



THE STATE OF STATE OF WASHINGTON TOURISM

David Blandford, CEO
State of Washington Tourism

August 13, 2025

2024 STATE TOURISM STATISTICS

- VISITOR VOLUME
110.8 million (+2.7%) – 101% of 2019
- VISITOR EXPENDITURES
\$25.1 billion (+5.3%) – %4.8 of 2019
- VISITOR GENERATED TAX RECEIPTS
\$2.6 billion (+4.1%) – offsets average household tax burden by \$1,140
- TOURISM EMPLOYMENT
152,131 direct jobs supported (+4.7%)

Source: *Tourism Economics, 2024*



HOW ARE WE *REALLY* DOING?

- 2024 visitor volume, spend, tax revenue, jobs near 2019 levels

However:

- Real spending, inflationary pressures, travel prices = 5% below 2019
- WA spending growth slightly higher than national average
- Pace of recovery uneven
- Seattle/KC visitor spending +6.8%, rest of counties +4.0%



TOURISM DEMAND AND KEY PERFORMANCE FACTORS

- Canadian inbound travel down 30%
- Statewide hotel occupancy down
- Tariff wars, proposed \$250 Visa integrity fee
- Inbound US visitation – mixed bag
- Alaska Airlines international route expansion:
 - Rome
 - Seoul
 - Tokyo
 - London Heathrow
 - Reykjavik



ROLE OF THE DMO





SWT MISSION & STRATEGIC POSITION

- Official state DMO
- Industry led 501(c)6
- Stimulate new money for WA (out-of-state visitation)
- Drive market development
 - North America
 - Overseas
- Optimize tourism: seasonal demand, need periods
- Beneficial flow of statewide visitation

STATE OF WASHINGTON TOURISM INDUSTRY PARTNERSHIPS

Regional DMOs,
Chambers



Trade Associations

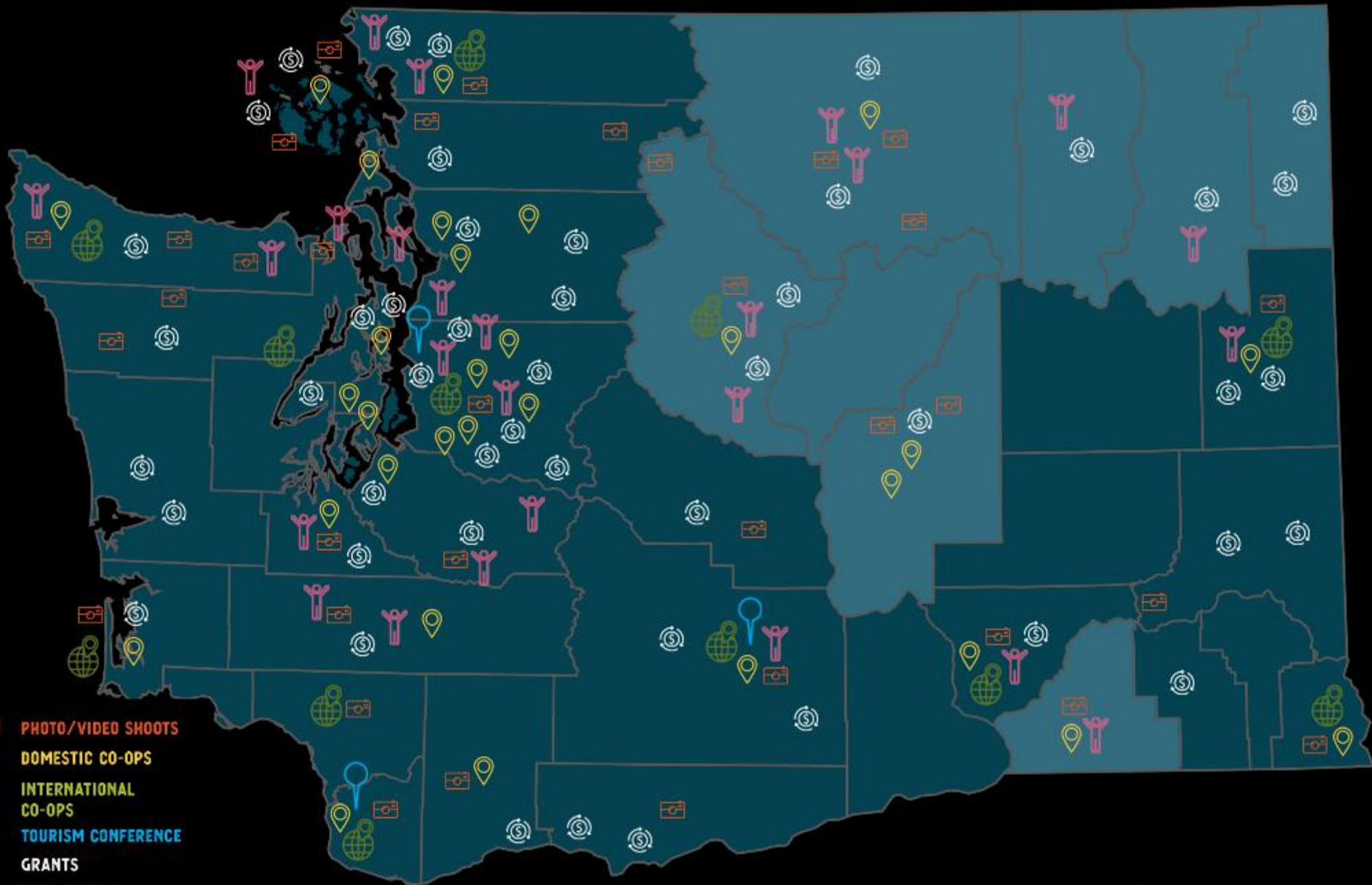


International Tourism



Tourism Advocacy





-  PHOTO/VIDEO SHOOTS
-  DOMESTIC CO-OPS
-  INTERNATIONAL CO-OPS
-  TOURISM CONFERENCE
-  GRANTS
-  FAM TOURS
-  RTS PROGRAM

INDUSTRY INVESTMENT



INDUSTRY RECOVERY AND DEVELOPMENT

- ✓ Rural Tourism Support program
- ✓ Technical assistance & development grants
- ✓ DMO recovery grants
- ✓ Agritourism grants
- ✓ Industry co-op programs – consumer data and research
- ✓ \$3.5 million distribution of in federal recovery funds for Washington’s tourism industry in 2024-2025 (contracted by Dept. of Commerce)

DESTINATION BRANDING & PROMOTION



BRAND VALUES

WASHINGTON TOURISM

From an event to a social post, the brand values should be reflected in everything we put out into the world.

APPRECIATIVE

Recognition and enjoyment of the good qualities of our people and places.

MODERN

Happening now, in motion; Caught in the moment; Defining the future together.

OPTIMISTIC

Sense of possibility; 'Can do'; Why not? Attitude.

IMMERSIVE

Touch, feel, indulgence; Texture, grit, sensory experiences; Learning, understanding and respect gained through experiences.

INVENTIVE

Love of creation; Independent exploration;

IMAGERY:

AUTHENTIC NATURAL & TRUE

The State of Washington brand is about being in the moment and authentically connecting: with the landscape, with others and with oneself. The story should naturally unfold in front of us and not be manufactured by marketing.

Washington is a place for all.

We must always have an eye on



MARKETING & PR PROGRAMS

- Statewide video, digital, paid social, native, paid search
- New web site content monthly
- Social channel updates daily
- Co-op programs for DMOs and industry partners
 - Marketing, content, small businesses, digital programming
- FAM trips and press visits
- Retained national PR firm
- Ongoing media pitches
- Reactive media relations



TRUE TO NATURE CAMPAIGN



YOU DON'T
HAVE TO
BE LOST TO
FIND YOURSELF.



#TRUE TO NATURE

LEARN MORE



NO WRONG
PATHS, ONLY
DIFFERENT
ONES.



#TRUE TO NATURE

LEARN MORE



JOURNEYS
ARE AN
OPEN-ENDED
CONVERSATION.



#TRUE TO NATURE

SAVOR LOCAL FLAVOR

MARKETING CAMPAIGN RESULTS

- 2022 launch: **\$33:1 ROI**
- 2022-2023: **\$69:1 ROI**
- 2023-2024: **\$184:1 ROI**

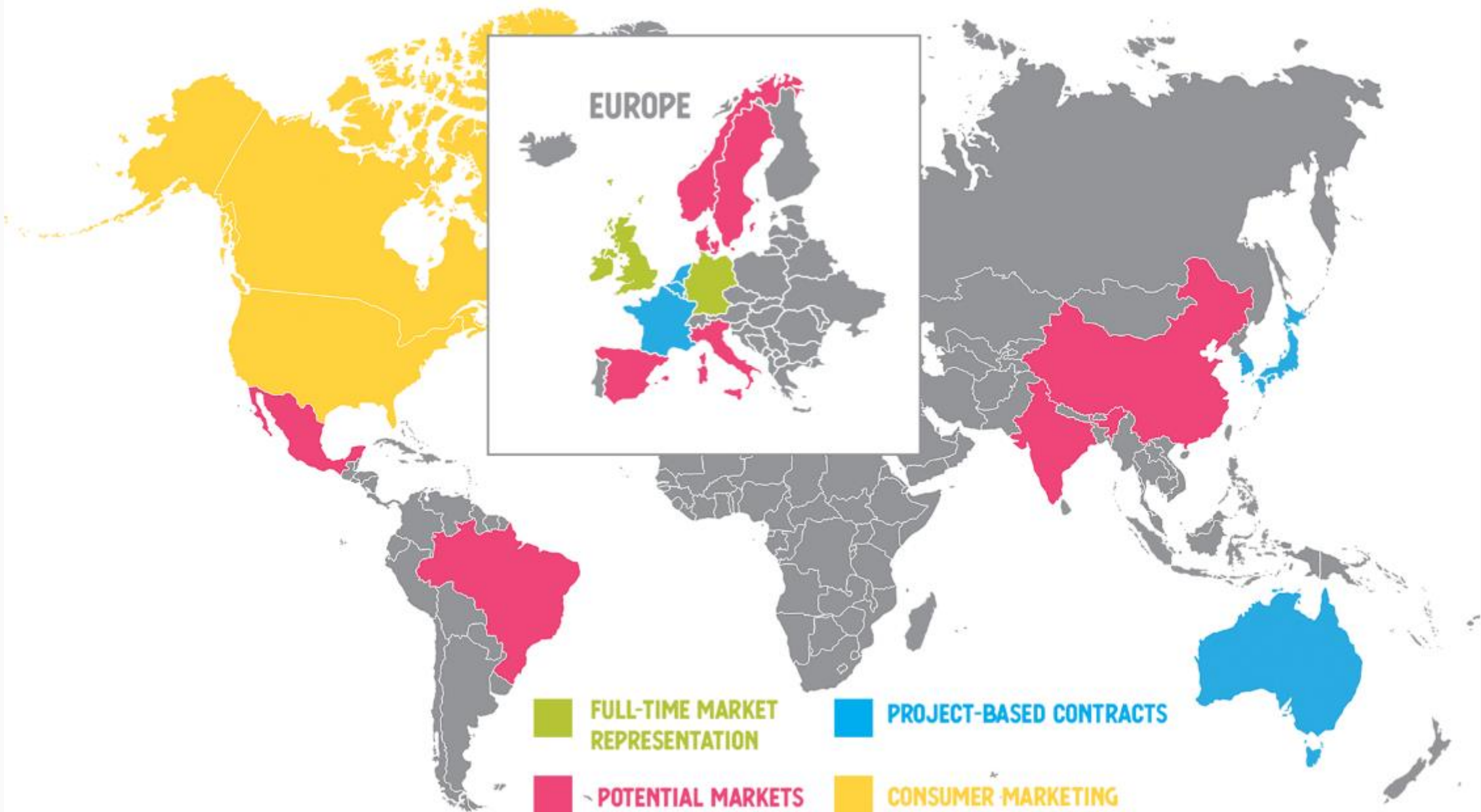
**Top 10 campaigns
measured by SMARI Insights**

**Time in market = campaign
efficiency, greater ROI**



INTERNATIONAL TRAVEL TRADE

INTERNATIONAL POTENTIAL, STRATEGIC PARTNERSHIP





IPW in LA



FAM Visit to Nordic
Museum



Wild WA Wine Event, London

TRAVEL TRADE & OVERSEAS TOURISM

- ✓ Year-round trade show promotion
- ✓ Tour operator/media FAMs
- ✓ Co-op programs for industry
- ✓ In-market representation:
 - UK/Ireland, Germany, Australia
- ✓ Project contracts:
 - Japan, South Korea, France, Benelux

PRIORITIES AND PROGRAM DEVELOPMENT



WORLD CUP PROMOTION

- International travel planner: portable printed piece translated into German, Spanish and Japanese and ready for additional translations will be distributed by international reps
- Photo and video captured around the state in fan zones and on likely World Cup visitor routes available in SWT library
- Microsite with destination B.C. will promote travel between the province and Washington State.





RECREATION

- Top travel motivator for Washington
- Highlight all four seasons, with an emphasis on less-visited regions and experiences during summer
- Emphasize distinctly Washington experiences like water recreation, bioluminescence, and how to visit National Parks responsibly
- Shift messaging to things like ski, snowboard and snowshoeing in winter season

RESPONSIBLE TRAVELER, ADVISORY & EDUCATION

- **Balanced promotions**
 - Seasons, need periods
 - Sensitive communities
 - Public and tribal lands
- **Coordination**
 - State agencies
 - Emergency management
- **Public/traveler education**
- **Responsible Outdoor Travel Summit**



Art Strolls

IT'S ALMOST IMPOSSIBLE to walk through most Washington cities and even many small towns without spying a colorful mural, an art installation, or a gallery filled with creative works. And with the establishment of the Creative Districts program by Arts Washington, communities can express their cultural identity while kickstarting their economies. Check out these lively hubs of visual and performing art.

CHEWELAH With a popular First Thursday Art Walk and an eclectic mix of painters, photographers, jewelers, and other crafts makers, this picturesque mountain town north of Spokane has a vibrant arts scene.

Fused glass at
Whatcom
Art
Market



FAIRHAVEN, BELLINGHAM On the shores of Bellingham Bay, this historic village is home to several galleries, including the Whatcom Art Market, which features paintings, sculptures, ceramics, and more by 45 local creatives, and Chuckanut Bay Gallery, with its beautiful sculpture garden.

FRIDAY HARBOR In the main port of glorious San Juan Island, view artwork by Coast Salish carvers and painters at the Arctic Raven Gallery, and jewelry and sculptures at WaterWorks Gallery. Summers here feature outdoor theater performances and the Summer Music Concert Series.

GIG HARBOR With eight art galleries, plus annual arts festivals and performing arts and dance studios, this charming boating community near Tacoma is a favorite creative destination.

PIONEER SQUARE, SEATTLE Also known as Seattle's first neighborhood, Pioneer Square

is an art mecca, with more than a dozen galleries and well-attended First Thursday Art Walks.

PORT TOWNSEND Film and arts festivals, live theater, and galleries come together in this Victorian-era seaport that's a pleasure to explore on foot.

SPOKANE Artists of every stripe flock to the Inland Pacific Northwest's largest metropolis. The First Friday Art Walk

showcases galleries and creative spaces in the city's vibrant downtown, and visitors can take a Sculpture Walk through colorful Riverfront Park.

WALLA WALLA Wine is just one of the big draws of this arts-minded college town in southeastern Washington. It's also home to the longest-running symphony orchestra west of the Mississippi, and an abundance of studios, galleries, and theaters. —Malia Alexander

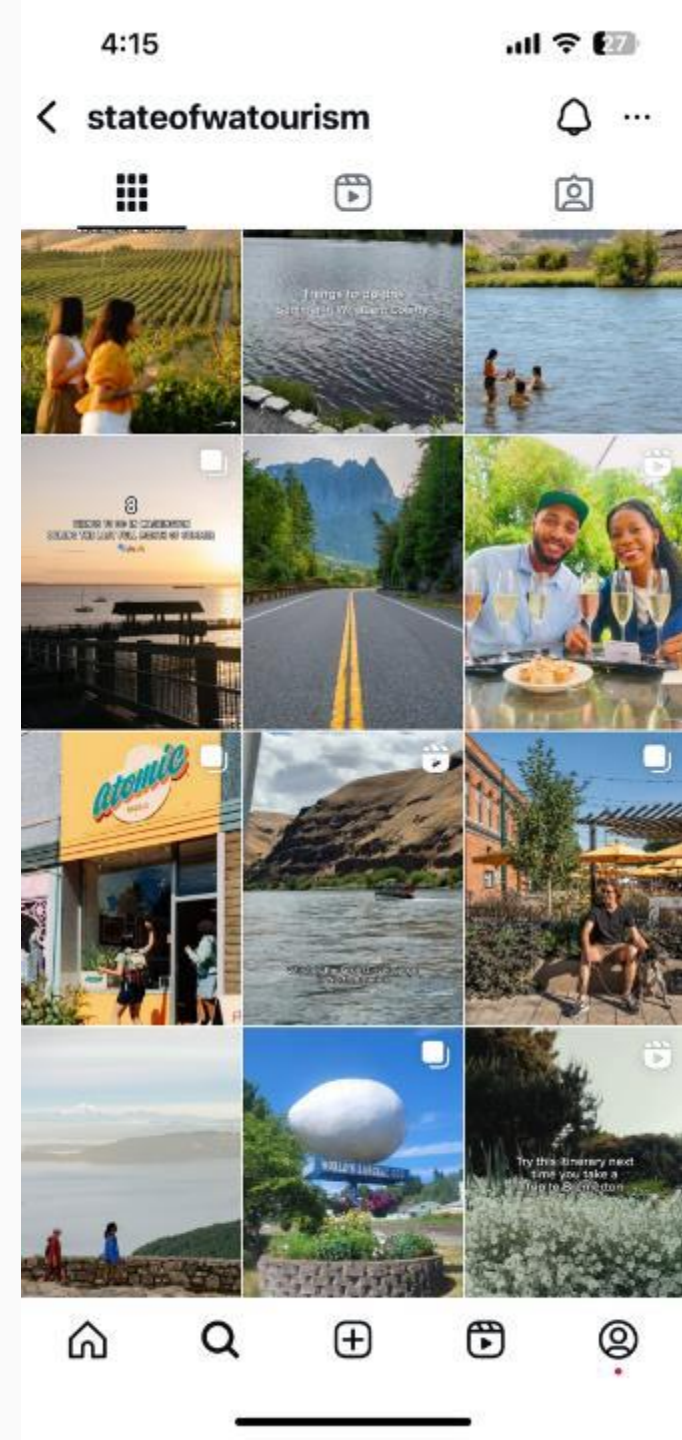


CULTURAL TOURISM

- Consumer campaigns, web portal, state visitor guide, social media
- Additional funding: Expand air markets for Washington
- Arts & culture is top travel motivator for SWT regional markets such as Vancouver, BC
- Visit Tour operator/media itineraries feature cultural stops
- International markets stay twice as long, spend four times as much as do domestic

SOCIAL CHANNELS

- Currently active on Facebook, Instagram, X and TikTok
- Pinterest will be added to channels in 2025
- Post a mix of articles, links, photos, slideshows and stories to inspire travel around the state
- Added short form video in 2024 partnering with creators around the state



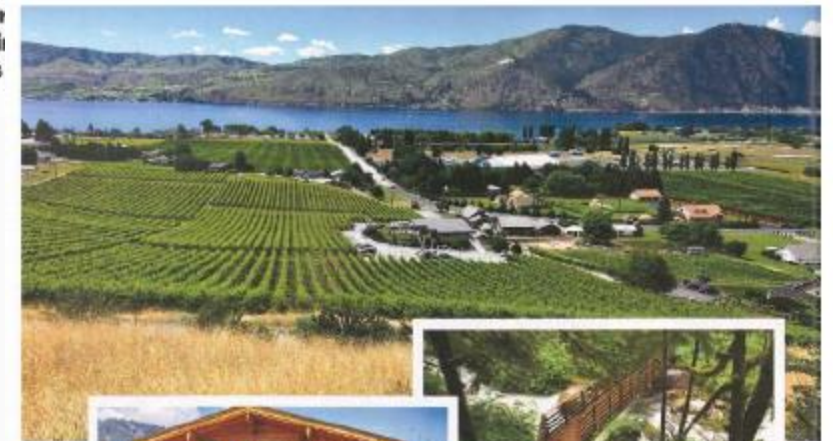
PUBLIC RELATIONS

- Recent coverage highlights include Travel Noire, AAA Explorer, National Geographic
- Wine country FAM completed in May
- Attendee quote “This is my first time visiting Washington, and I had no idea all of this was here. I love it and can’t wait to come back and explore more of the state! Sorting through pitching ideas now.”



Circle of Dreams

Washington's Cascade Loop is a lavish playground of food and charming fairy tales. This is America's
BY BRAD WRIGHT



Day 1 ► EVERETT

With its proximity to both the Seattle Tacoma and Paine Field airports, the up-and-coming city of Everett is a convenient starting point for the loop.



to a spectacular view of the 265-foot cascade at the Middle Falls overlook.

Now that you're inflated into the Cascades, continue on to the make-believe Bavarian village of Leavenworth. Surrounded by crenelated alpine peaks, the town is a living postcard with gabled architecture, dirdl-wearing shopkeepers, and horse-drawn carriages. Time your summer visit to arrive on a Saturday, so you can soak up the town's old-world aura at the weekly 5:30 p.m. alphon per-

Washington State Visitor Guide

Editions produced in spring of each year
275,000 copies are distributed annually to potential visitors nationwide

Photo/Video Library

We maintain a library of photo and video assets that can be used by media and tour operators to promote Washington State.



FOOD & BEVERAGE

- Social posts showcase specific experiences
- Statewide roundups include destinations in all 7 regions
- Highlight a range of experiences, including:
 - Wine & beer
 - Festivals & Events
 - Fine Dining
 - Local flavors like apples or shellfish
 - Agritourism



SUPPORTING AGRITOURISM

- Local food and agricultural experience in web, social and campaign content
- Partnership with Eat Local First network: local food & farm finder, and educational content
- Rural Tourism Support Program: development of new agritourism product
- Educational programming provided through free webinars, conferences



AGRITOURISM IN WASHINGTON

- Fewer farms, reduced ability to make a living
- Most farmers are small scale: 77% operate under 100 acres
- Just 62% operate year-round
- Over 40% gross less than \$40k/year
- Most farmers just beginning to explore income from agritourism



CHALLENGES & OPPORTUNITIES

- Labor costs
- Infrastructure development
- Marketing support
- Regulatory definition of agritourism
- Favorable state/county policies
- Farmer toolkits and technical assistance



SUSTAINABLE AND COMPETITIVE FUNDING INITIATIVE

THE ROAD TO HERE: FUNDING INNOVATION

- 2011** State tourism office closed in Great Recession
- 2018** Base funding/2:1 private/public match = \$1.5M annually
- 2021-22** Port of Seattle recovery partnership = \$1.5M
- 2021-23** Legislative proviso (federal relief funds) = \$12M
- 2023-24** Port of Seattle overseas marketing contract = \$800,000
- 2023-25** Biennial base funding increase/industry 1:1 match = \$4.5M
- 2025-27** Port of Seattle Int'l Program = \$1.5M

STATE FUNDING STATUS

GOOD NEWS & BAD NEWS

2025-27 Biennial Budget

SWT base funding:

Reduced from \$4.5M to statutory \$1.5M

ESHB 2061 passage

New revenue tax on duty free sales splits revenue between SWT and Sustainable Aviation Fuel Account:

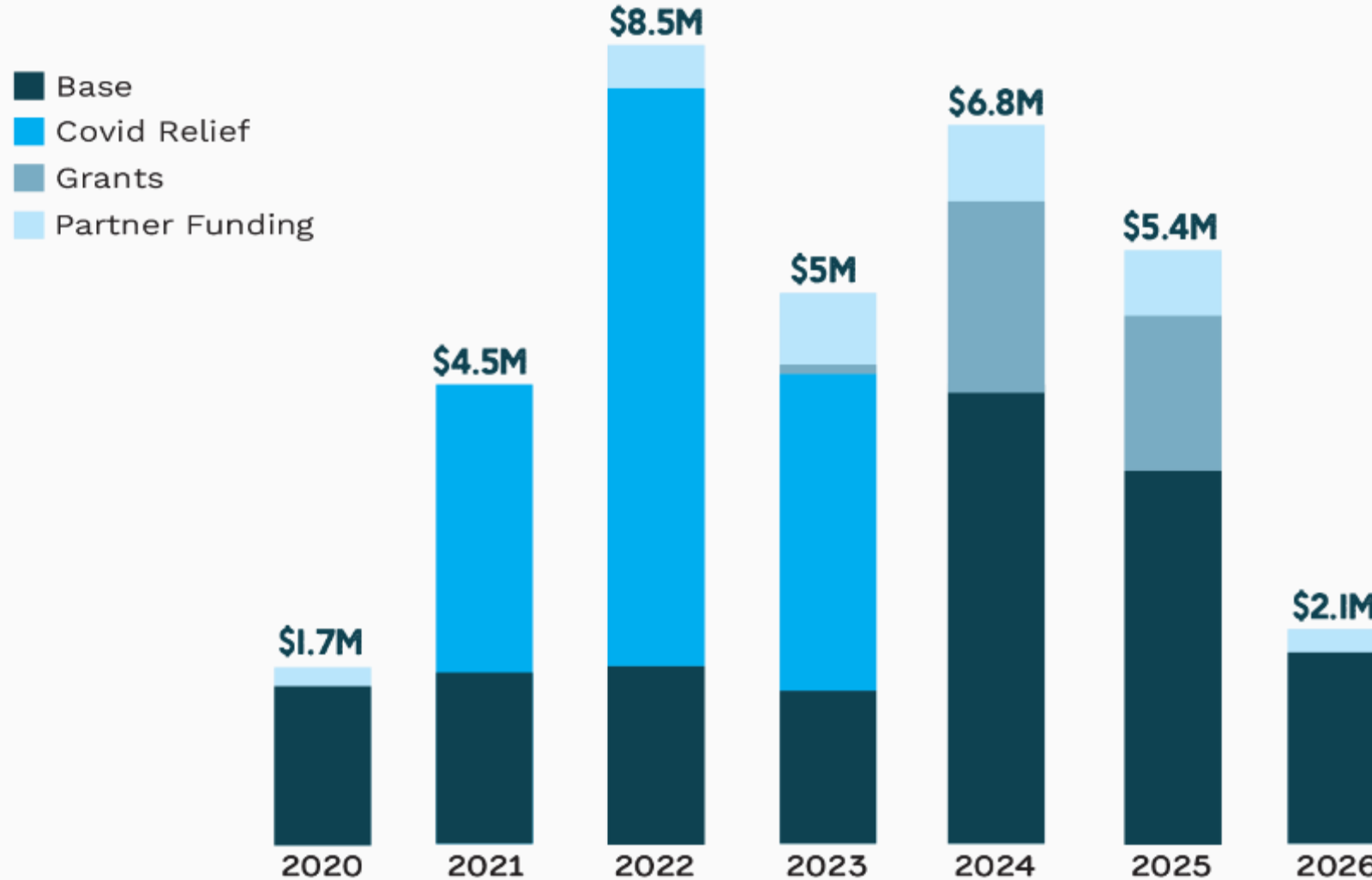
Combined General funds + duty free revenue could restore SWT state funding to \$4.5 million/year by 2028

SHB 5492 passage

Passed by legislature, signed by governor:

Gateway to industry self-assessment, long-term sustainability and competitive marketing position

SWT FUNDING TRAJECTORY (WITH CURRENT MODEL)



COMPETITIVE ANALYSIS: OVERVIEW

Washington ranked 5th in lodging industry size and last in tourism office funding

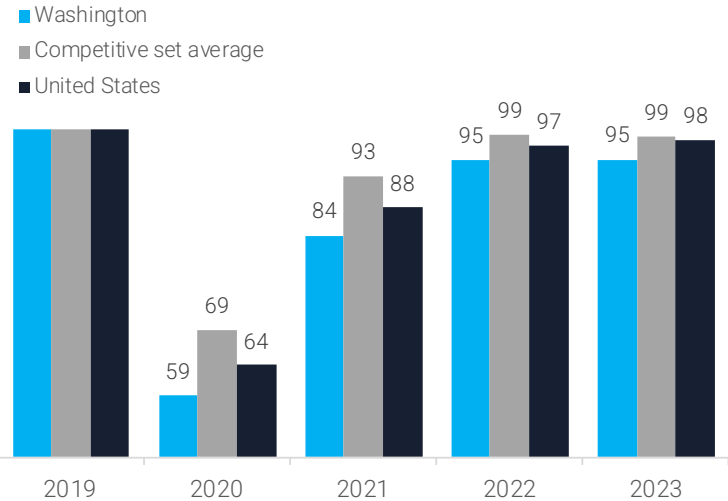
	DMO Budget	Room Revenue	Budget Share of Revenue	Budget Share Rank
Montana	\$37.5	\$1,109.3	3.4%	1
Oregon	\$38.3	\$2,166.4	1.8%	2
Utah	\$29.6	\$2,134.3	1.4%	3
Idaho	\$10.9	\$834.0	1.3%	4
Arizona	\$44.0	\$4,745.1	0.9%	5
California	\$164.1	\$26,401.7	0.6%	6
Nevada	\$47.3	\$10,263.9	0.5%	7
Colorado	\$20.5	\$5,053.8	0.4%	8
Washington	\$7.0	\$3,733.8	0.2%	9

Source: State of Washington Tourism, U.S. Travel Association, STR

COMPETITIVE ANALYSIS

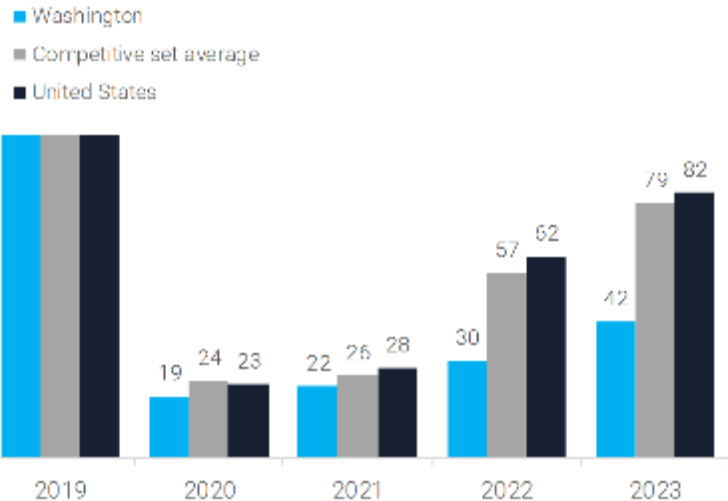
LODGING PERFORMANCE

Washington trailed pre-pandemic levels by 4% more than its competitive set in 2023



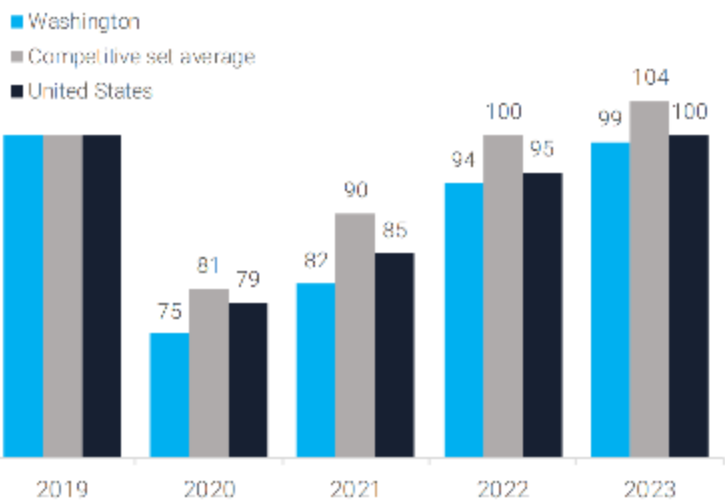
INTERNATIONAL MARKETS

International visitation recovery in Washington trailed competitive set by 37%



TOURISM-SUPPORTED EMPLOYMENT

Washington leisure and hospitality industry jobs recovery trailed competitive set by 5% in 2023





POTENTIAL OF DESTINATION MARKETING IN WASHINGTON

May 2024

Prepared for: State of Washington
Tourism

BENCHMARK STATE TOURISM STUDY

- SWT ROI: 29:1
- WA significantly under-funded relative to market size
- WA stands to gain \$14.6 billion in next decade with budget comparable to competing western states

SUCCESSFUL DESTINATIONS *TAP USER FEES*

Brand USA

\$250 million annual budget

Fees paid by Visa Waiver country visitors to U.S.
Matched 1:1 by travel industry/corporations
Re-authorized by Congress every six years

Travel Oregon

\$38 million annual budget

Tax paid by hotel guests via 1.5% transient lodging tax

Visit California

\$164 million annual budget

Fees of visitors via a Tourism Improvement District
30-year success, 97% favorability of TID businesses

A SUSTAINABLE + COMPETITIVE FUNDING MODEL FOR **WASHINGTON**

\$20M

- Industry self-assessment program
- Shared investment across business segments
- Industry driven program with ROI
- Nominal fee (0.4% of a dollar)

\$1.5M

Maintain General Fund appropriation

\$2M

Increase membership, corporate sponsorship & strategic partnerships

\$23.5M

Total annual operating budget

POTENTIAL SELF-ASSESSMENT PARTICIPANTS

Tourism businesses across multiple segments *pass on fees at a nominal rates, such as 0.4% of a dollar (two tenths of a cent)* to customers:

- **Lodging:** Hotels, B&Bs, RV parks, others
- **Travel Services:** transportation, sightseeing, tours
- **Attractions/Arts & Culture:** Attractions, museums, performing arts, theme parks
- **Recreation:** Golf courses, ski areas
- **Beverage Industry:** Wine, beer, distilling, cider-making
- **Restaurants & Drinking Places:** Full-service dining and bars
- **Retail:** Department stores and general merchandise

SAMPLE ASSESSMENT FEES AT 0.4% OF A DOLLAR

\$200 hotel folio	80 cents
\$120 arts ticket	48 cents
\$100 restaurant bill	40 cents
\$80 guided tour	32 cents
\$20 attraction ticket	8 cents

Administrative Ease:

State collects assessments in alignment with annual tax collections/schedules, passes in full to state tourism program

2025 FUNDING INITIATIVE CALENDAR

- ✓ **SHB 5492** Passed by legislature (195-1), signed by Governor
- Summer 2025** Business stakeholder listening sessions
- Late July** Industry advisors appointed, assessment rulemaking
- October 8-10** Draft assessment rules and industry feedback
- November 1** Industry rules recommended to legislature
- 2026 Session** 2nd bill to establish statewide assessment
- Spring 2026** Industry referenda to approve assessment program

STRATEGIC, ALWAYS-ON MARKETING PROGRAMS

- Influence off-peak, mid-week demand through inspirational story telling
- Promote shoulder (spring & fall) and off-seasons (winter) to stimulate year-round revenue
- Enhance Washington's profile among key affinity groups including winter recreators, food-motivated travelers, and arts & culture aficionados
- Support local destination growth and management goals



FULLY ACTIVATED INTERNATIONAL TOURISM

Expanded Overseas Market Presence

- Europe, Australia, India, China, emerging markets

Enhanced Consumer Awareness

- In-market activations
- Digital marketing & influencer partnerships
- Targeted marketing and advertising

New Tour Product Development & Sales

- Expanded FAM and trade show schedule
- Tour operator sales promotions

Earned Media

- WA Press Trips
- Full-time dedicated PR agency



INDUSTRY (RE)INVESTMENT

- **Community and regional resilience**
 - Tourism as a shared community value
 - Grants for destinations, regions, businesses
- **Optimize visitation**
 - Overnight stays, retail, festivals and events (where needed)
 - Address capacity issues
 - Visitation management and planning resources
- **Infrastructure development and grants**
 - Wine and food trails
 - Visitor Shuttles/transportation



OUTCOME: MORE BUSINESS FOR WASHINGTON

Projected Returns with a \$25M budget, 2025–2034

(source: Tourism Economics):

- **\$14.6 billion** Additional visitor expenditures
- **2.1 billion** Additional room revenue (\$250M/year average)
- **\$1.4 billion** Additional state and local tax revenue
- **\$116 million** Additional lodging tax revenue



STATE OF
WASHINGTON
TOURISM

THANK YOU

David Blandford – david@stateofwatourism.com