

APPENDIX A: DESTINATION COMPETITIVE ANALYSIS

Asheville / Buncombe County, North Carolina

Asheville, North Carolina features layers of lush mountains that abound with adventure, profound cultural roots from literary giants to American royalty, and inspired locals whose passion projects jump from pop-up kitchens to performance art. Asheville has been a point of pilgrimage since the 1800s as a destination for inspiration, rejuvenation and self-expression. No wonder George W. Vanderbilt chose this Blue Ridge city for his greatest legacy, [Biltmore](#). And perhaps why *Lonely Planet* named Asheville as the #1 destination in 2017, just one of many accolades for this hip mountain town.

Beer is big in Asheville and only continues to grow. With 28 breweries in the city and 30 in Buncombe County, Asheville has the most breweries per capital in the country. Four additional breweries will open by the end of 2017, including Turgua Farmstead Brewing, set on a five-acre farm in Fairview and utilizing fruits and root vegetables. SmartAsset.com ranked Asheville #2 among "[The Best Cities for Beer Drinkers](#)" following a study that analyzed various sources of data (December 2015).

Asheville is also a foodie town, with its own "Foodtopia" campaign to attract culinary tourists to its 250+ independent restaurants; six James Beard nominated chefs; 28 breweries; 14 farmers markets; one vegan butcher; 1,000+ family farms; one wild foods market, the first in the nation; three craft hard cideries using local apples; the fifth micro sake brewery in the nation; one rum distillery (the only one in Western N.C.); one kombucha bar, all local; one honey bar/boutique; one underground supper club with wild themes and secret locations; two insanely creative donut shops; two locations to get bean-to-bar local chocolate; one mushroom man tour guide; and the first woman to legally distill moonshine.

Asheville's creative arts community by the French Broad River, known for its visitor-friendly art studios and galleries set in old industrial buildings, has an influx of new experiences for travelers. In addition to New Belgium craft beer moving in, other new neighbors include The Salvage Station (large riverside music venue), Asheville Guitar Bar (cozy bar and music-themed art installations), RAMP Studios (home to artists and a ginger beer brewery) and The Foundation (new public art-filled home for 12 Bones and a second Wedge Brewing location). The area has a transformative multi-year plan that includes connected greenway spaces, bike trails and new adventures on the French Broad River.

The Asheville Convention & Visitors Bureau (CVB) uses the tag line "Discovery, inside and out" to drive visitation. The CVB redesigned ExploreAsheville.com with 120+ pieces of new content, 100+ navigation pages, realized four+ million user sessions (72% new site visits). The CVB oversees a \$6 million advertising plan focusing on traditional core markets in the southeastern U.S. (Greensboro, Charlotte, Raleigh, NC; and Atlanta, GA) and expanded markets (Columbia,

Charleston, SC; Nashville, Knoxville, TN; Cincinnati, OH; and Jacksonville, Orlando, Tampa, West Palm Beach, Miami, FL). The advertising campaign features new broadcast, print and digital ads reaching target audience of 455 million. Proactive Media Relations led 746 targeted pitches and 204 media site visits netting 3.8 billion impressions. Video assets realized a total of six million video views; return again received 2+ million views; 15- and 30- second spots received 3.9 million views. The CVB recently set out to establish Asheville as a Top Music Town – with a new music website (Explore Asheville Radio, comprehensive live music calendar, streaming video with IAMAVL editorial content); advertising campaign targeting music enthusiasts; a music culture PR and content push; and video to promote Asheville’s music scene.

Perhaps one of the most progressive programs is Asheville's Tourism Product Development Fund. Since its inception in 2001, \$23 million has been awarded to 27 community projects. Annual grants and loans range from \$16,500 to \$2 million. Several of the funded projects are historic or cultural: Grove Arcade, Western North Carolina Veteran’s Memorial at Pack Square Park, Buncombe County Civil War Trails, Asheville Art Museum, and Riverglass Public Glass Studio & School. In 2017, grants were awarded to complete the Pack Square Park Canopy, River Access to Pearson Bridge; Smoky Mountain Adventure Center; The Collider; and the Rooftop & Event Space at Highland Brewing Company. Asheville added 2,072 new rooms in the last two years, demonstrating need for more tourism product to support increased visitation.

Bend, Oregon

Six hours southeast of Bellingham, or a short 55-minute flight from Seattle, the community of Bend, Oregon serves as the gateway to the Umpqua National Forest and the Warm Springs Reservation. With a relatively young population (average age of 37.3 years) of 84,000, Bend offers several world-class attractions including the Mount Bachelor ski area (3,683-acre ski area with 10 lifts); Deschutes National Forest (with hiking, forest, cave, wildlife, and camping); Lava Butte (volcano and hiking); Tumalo State Park, La Pine State Park, Pilot Butte, Farewell Bend State Park, and Dillon Falls; and several manmade parks including Pine Nursery Park and Bend Whitewater Park. The High Desert Museum educates visitors about the region through natural and cultural history exhibits. Art in the High District (juried show), the historic Tower Theatre, Les Schwab Amphitheatre, public art program, and Jazz at the Oxford Hotel are just some of the cultural and historic attractions in the community.

Bend hosts three million visitors annually,¹ with 63% of the visitors living outside Oregon and 14.7% of summer visitors from Washington State. Travel and tourism is responsible for 8,480 jobs in Deschutes County.² Lodging occupancy rates

¹ Source: RRC

² Source: Dean Runyon

ranged from 88.8% (peak) in July 2016 to 54.5% (low) in January 2017.³ In FY16, Transient Room Tax (TRT) generated \$7.6 million for the city; in FY14 and 15, the TRT generated \$6.3 million in local tax.⁴

The Visit Bend annual FY17 budget is \$3.26 million, with eight full-time employees. Using the marketing tag line, “It’s Where You Go to Play,” Visit Bend promotes summer and winter world-class river activities, trail running on the Urban Trail System, and enjoying the “vibrant energy of a hip, cosmopolitan mountain town.” While the marketing driver for Visit Bend is the visitbend.com website (with more than 1.4 million visitors in 2015). The destination marketing organization (DMO: Visit Bend) recently began an aggressive :60 and :30 minute TV ad campaign throughout Oregon, Washington, and California (\$300,000 dedicated to media buys outside Oregon). Radio ads promote special events and seasonal promotions. National and regional print ads showcase natural beauty and distinctive recreation.

The Bend Cultural Tourism Fund (BCTF) is a “grant program dedicated to enhancing the local economy through the promotion and cultivation of Bend’s cultural tourism programs.” The program, funded by 7.5% of Visit Bend’s total annual public funding received from the City of Bend, awarded \$125,000 to cultural tourism programs in 2015 and more than \$185,000 in 2016.⁵ The community also created a Community Wide Visitor Development Fund to attract major events, conferences and conventions to Bend. The FY17 Marketing and Business Plan includes a strategy focusing on diversification of tourism offerings with an aggressive cultivation of non-outdoor recreation tourism offerings. In addition to the Bend Cultural Tourism Fund, this effort includes expansion of the Bend Ale Trail and introduction of the Drinkable Diversions, expansion of the Tin Pan Alley Art Collection, the Roundabout Art Route, and the Pillars of Art Program.

San Juan Islands, Washington

The Business Association of San Juan County, doing business as San Juan Islands Visitors Bureau (SJIVB), was formed in 1999 as a private, nonprofit, volunteer destination marketing organization. The SJIVB has served as San Juan County’s, and the Town of Friday Harbor’s, official, locally-staffed destination marketing organization (DMO) since 2003. The organization’s mission is to enhance the economic prosperity of San Juan County by promoting the San Juan Islands as a preferred, year-round travel destination, while respecting and sustaining the Islands’ unique and diverse ecosystems, environments, lifestyles and cultures. The organization currently has 292 members, is managed by a 15-member board of Directors, and five staff. The Brand Positioning Statement is “For Adults 25-64, the SJIVB helps me imagine and plan a getaway for me and my family and friends that will reconnect us to a quality of life where there’s breathtaking beauty,

³ <http://www.visitbend.com/2017.4.21-Bend-Oregon-Occupancy-Report.pdf>

⁴ Bend Oregon FY 2017 Business Plan, <http://www.visitbend.com/About-Us/Business-plan/>

⁵ <http://www.visitbend.com/About-Us/bend-cultural-tourism-fund/>

rich activities, and wonder and discovery encased in a soothing, rural, small-town atmosphere where life feels a little slower paced and a little safer.”

All marketing strategies drive consumers to the website, www.VisitSanJuans.com, the destination’s #1 marketing tool. According to Google Analytics, web ‘sessions’ were up +7.9% (1,109,888), pageviews were up +16.7% (4,526,096), and pages per session were up +8% (4.08). Age groups viewing the website were as follows: 27% were 25-34 year olds, 22% were 35-44 years, 16% were 45-54 years, 15% were 55-64 years, 10% were 18-24 years, and 9% were 65+. Technology being used to view the site was as follows: desktop 48%, mobile 39%, tablet 13%.

Advertising was placed in key, regional, ‘portal’ travel guides and their corresponding websites including the Seattle Visitors Guide (350,000 X 2 issues), www.VisitSeattle.org, the Washington State Visitors Guide (375,000), www.ExperienceWA.com, a scenic byway ad and listing in the Washington State Scenic Byways Guide & Map (400,000 combined circulation). Via a lodging tax grant from the Town of Friday Harbor, SJIVB manages five seasonal advertising campaigns in the greater-Seattle area – Winter Romance, Spring, Summer, Fall/Savor the San Juans, and Cozy Island Holidays. Mixed media campaigns were placed in print, online, TV and radio for over 36,000,000 ad impressions. SJIVB tracked print media coverage of the Islands in over 689 print and online articles including *Sunset* magazine (1.6 million print & online), *The Wall Street Journal* (1.3 million), *Travel + Leisure* (976,500), *Conde Nast Traveler* (814,000), *The Seattle Times* (199,000), *Seattle* magazine (190,664), *Los Angeles Times* (15 million), and *Time Out New York* (141,866).

The SJIVB exhibited at “Seattle Wine & Food Experience” in February, “Taste Washington” in April (the country’s largest single region food & wine tasting event), and “Red, White & Brew” in July (Seattle magazine’s Washington Wine Awards tasting). SJIVB also partnered with the Ag Guild to create a two-page map/advertisement in the 2016 Puget Sound Fresh Farm Guide state-wide directory, titled “Explore the Farms & Food of the San Juan Islands,” which featured 41 island farms and restaurants. 130,000 copies were published and distributed throughout the state. The San Juans were also included on the app at www.pugetsoundfresh.org/freshapp.

For the fifth year, SJIVB worked with reps from the Town of Friday Harbor; the Orcas, Lopez and San Juan Historical Museums; and the San Juan Island National Historical Park to coordinate efforts to market National Historic Preservation Month in May as “History Lives Here: Heritage Month in the San Juan Islands.” It was promoted via a press release to regional media, and on the SJIVB website’s home page and island history itineraries.

A Tourism Management Plan is currently under development, with county and industry stakeholders in conversation about how to move the plan to completion/implementation.

Accolades include 2016 *Travel + Leisure* World's Best Awards: #2 of World's Friendliest Island; 2015 *Conde Nast Traveler*, Best U.S. Islands for Family Vacations: Reader's Choice Awards; 2015 *Travel + Leisure*, Best Islands in the Continental US; 2015 TripAdvisor Traveler's Choice Awards: #9 of Ten Best Islands in the U.S.; *Lonely Planet*: #3 of Top 10 U.S. Destinations for 2013; San Juan Islands National Monument designated March 2013. In January 2017, completed \$4.2 million fundraising campaign for Mount Grant Preserve, a 141-acre ridgeline offering multiple recreational opportunities.

Yakima Valley, Washington

The Yakima Valley is a collective of charming communities located within Central Washington. Boasting four seasons and over 300 days of annual sunshine, the Yakima Valley is an agricultural and multi-recreational area. The geography consists of various types of terrain including dense forests, stark desert landscapes, vineyards, hop and produce fields, orchards, rolling hills, scenic vistas which include Mt. Rainier and Mt. Adams and multiple water formations. Numerous historic towns, vintage electric trolleys and scenic wonders are within the Yakima Valley's countryside.

The first white men to view the Yakima Valley were members of the Lewis and Clark Expedition of 1805. In 1865, Yakima County was officially established and by 1880, nearly 3,000 people were reported in the county. Historic attractions include Yakima Valley Museum and Children's Underground, Yakima Electric Railway Museum, Yakima Valley Trolley (vintage wooden railroad trolley cars), Yakima Valley Rail & Steam Museum, American Hop Museum, Central Washington Agriculture Museum, Fort Simcoe State Park Heritage Site, Where the West Still Lives / "City of Murals" (over 65 in Toppenish), Yakama Nation Cultural Center, and State Fair Park.

The Capitol Theatre serves as Yakima's primary performing arts facility and is located in downtown Yakima. This completely refurbished 82-year-old historic vaudeville theatre is a true testament to the community's dedication to its past and the arts. The stage is home to the productions of numerous local organizations such as the Yakima Symphony Orchestra, Town Hall Series, Community Concerts, as well as national tours and spectacular Broadway touring productions. The Warehouse Theatre Company features an outstanding art gallery and offers an impressive series of community plays throughout the year. Yakima's Symphony Orchestra provides an outstanding musical series. The Seasons Music Festival is held in a former church that was built using 17th Century Italian architectural designs. Its stained glass windows and high arching majestic ceiling provide the perfect ambiance for music and unparalleled natural acoustics.

The Yakima Valley is home to four American Viticultural Areas (AVAs), more than 70 wineries and over one third of the state's vineyards. It has a rich diversity of microclimates, rugged hillsides and wetlands. These factors contribute to the many wine grape varieties and wine styles achieved from Yakima Valley grapes. Exploration opportunities of the region's

viticulture is varied -- choose a walking tour of tasting rooms in historic downtown Yakima, a leisurely scenic drive from vineyard to vineyard in and around Wapato and Zillah, a stroll through urbane tasting rooms in Prosser or overnight in a romantic wine-country inn. Several wine celebrations also attract visitors. Spring Barrel Tasting, the last full weekend in April, provides the opportunity to sample wine straight from the barrel and stake a claim to the finished product before its even bottled. At Red Wine & Chocolate over Presidents' Day weekend (and close to Valentine's Day), chocolate lovers and wine devotees come together to enjoy pairings of creamy confections and rich red wines.

Outdoor recreation attracts nature enthusiasts to Yakima Valley. Hiking the Pacific Crest Trail, fishing at Rimrock Lake, enjoying White Pass Ski Company's Alpine and Nordic facilities, bicycling Yakima Greenway, meandering down Yakima Canyon Road (Washington State Scenic Route 821), fly fishing on the Yakima River, or enjoying white water rafting during the annual Yakima Flip Flop are just a few of the adventures available.

The mission of Yakima Valley Tourism (YVT) is to stimulate economic development by marketing the Yakima Valley for conventions, groups and leisure travel. In 2015, travelers spent \$376 million in Yakima County (a 2% increase over 2014), generated \$34 million in state and local taxes (a 5% increase over 2014) and supported 3,800 jobs (a 6% increase over 2014). Conventions are a major generator of economic activity for downtown Yakima; 57 conventions were held in 2016 (an increase of 12% over 2015) with attendees generating a \$10 million direct economic impact. The Yakima Valley Visitor Information Center had 11,764 walk-in visitors, helped extend the stay of 27% of visitors and facilitated \$154,605 in new visitor spending.

YVT also drives the dreaming and planning phases of travel to its website, Visityakima.org. In 2016, 361,515 people visited the website, an 8% increase over 2015, and created a 15% increase in lodging referrals. Social media is also an effective marketing tool for YVT, with 2,073 new Instagram followers. *Google's Five Stages of Travel*. Seasonal campaigns focus on craft beverages and related agritourism, touting the destination as the birthplace of Washington State's wine industry. The on-line consumer campaigns are supported by print and digital media buys in regional, national and targeted (wine) magazines plus social media placements in Facebook, Instagram and Twitter. The Tourism Bureau uses the tag line "Come. Visit. Stay. You'll see why we call this place home." Sports and conventions are two areas of proposed growth for Yakima Valley, with the Sports Commission strengthening the relationship with SOZO Sports Complex and expansion/headquarter hotel planned for the Convention Center.



To provide further comparison of cultural heritage assets between Bellingham and its competitors, the following tables show how TripAdvisor generated content ranks “museums” and “top things to do” for each destination.

Top Trip Advisor Attraction Listings of Competitors: Museums (July 8, 2017)				
Bellingham	Asheville, NC	Bend, OR	San Juan Islands, WA	Yakima Valley, WA
#1 Spark Museum	#1 Lexington Glassworks	#1 High Desert Museum	#1 The Whale Museum	#1 Yakima Valley
#2 Mindport	#2 New Morning Art	#2 Des Chutes Historical	#2 San Juan Islands	Museum
#3 Whatcom	Gallery	Museum	Sculpture Park	#2 Yakima Nation
Museum	#3 Asheville Pinball	#3 TAW Gallery	#3 Island Studios	Cultural Center
#4 Artwood Gallery	Museum	#4 Lubbesmeyer Art	(Friday Harbor)	#3 American Hops
#5 Bellingham	#4 Southern Highland	Studio & Gallery	#4 IMA – San Juan	Museum
Railway Museum	Craft Guild Folk Art		Islands Museum of Art	#4 Northern Pacific
#6 Whatcom Art	Center		#5 Arctic Raven Gallery	Railroad Museum
Market	#5 Woolworth Walk		#6 Orcas Island	#5 Sixth Street Art &
	#6 River Arts District		Artworks	Gift Gallery
	#7 Downtown Asheville		#7 Waterworks Gallery	#6 Central
	Art District		#8 San Juan Historical	Washington
	#8 aSHEville Museum		Society & Museum	Agricultural
	#9 Jonas Gerard Fine Art		#9 Crow Valley Pottery	Museum
	#10 Blue Spiral 1		#10 Lambiel Museum	

Top Trip Advisor "Things to Do" Listings of Competitors: By Ranking (July 8, 2017)

Bellingham	Asheville, NC	Bend, OR	San Juan Islands, WA	Yakima Valley, WA
#1 Whatcom Falls Park	#1 Biltmore Estate	#1 High Desert	#1 Moran State Park	#1 Yakima Valley
#2 Fairhaven Historic District	#2 Biltmore Gardens	Museum	(Olga)	Museum
#3 Boulevard Park	#3 Beer Tastings & Tours	#2 Newberry National	#2 Nature & Wildlife Tours	#2 14 Hands Winery
#4 Lake Padden Park	#4 The North Carolina Arboretum	Volcanic Monument	#3 Boat Tours	#3 Johnson's Orchards
#5 Triad River Tours (Upper Skagit rafting)	#5 Lexington Glassworks	#3 Pilot Butte State Scenic Viewpoint	#4 Lime Kiln Point State Park (Friday Harbor)	#4 Cowiche Canyon Trail
#6 Triad River Rafting & Tubing (Upper Skagit rafting)	#6 Asheville Visitor Center	#4 Tumalo Falls	#5 Whale Museum	#5 Treveri Cellars
#7 Mount Baker Theatre	#7 Basilica of Saint Lawrence	#5 Mt. Bachelor Ski Area	#6 Pelindaba Lavender Farm	#6 Airfield Estates Winery
#8 Spark Museum	#8 Asheville Pinball Museum	#6 Lava Lands Visitor Center	#7 Hiking & Camping Tours	#7 Two Mountain Winery
#9 Larrabee State Park	#9 Southern Highland Craft Guild Folk Art Center	#7 Ski & Snow Tours	#8 Dolphin & Whale Watching	#8 Alexander Nicole Cellars
#10 Nooksack Falls	#10 Grovewood Village	#8 Lava River Cave	#9 Lime Kiln Point State Park Interpretive Center	#9 Bale Breaker Brewing Company
#11 Boat Tours (San Juan Cruises/Schooner Zodiac/Gato Verde)	#11 Craggy Gardens	#9 Kayaking & Canoeing	#10 English Camp	#10 Terra Blanca Vintners
#12 Chuckanut Bay Distillery	#12 Thomas Wolfe Memorial	#10 Drake Park	#11 Orcas Island Pottery	#11 Tucannon Cellars
#13 Interurban Trail	#13 Western NC Nature Center			#12 Kana Winery
#14 Big Rock Garden Park	#14 Woolworth Walk			#13 Bonair Winery
#15 Lake Whatcom				#14 The Teapot Dome Gas Station
				#15 Daven Lore Winery