



Olympic
PENINSULA

TOURISM MASTER PLAN 2024-2029



Lake Sutherland, Port Angeles

Land Acknowledgement

In deep respect for the Quinault, Hoh, Quileute, Makah, Lower Elwha Klallam, Jamestown S'Klallam, Port Gamble S'Klallam, Skokomish and Squaxin Island Tribes, we honor their treaty rights on the Olympic Peninsula. We are grateful for their generosity in sharing their stories and images, as well as their enduring stewardship of this land, both ancestral and present, which enriches it.

We recognize the Olympic Peninsula holds profound significance for the local Native communities, fostering a heritage that transcends generations. In embracing this legacy, the Olympic Peninsula Tourism Master Plan pledges to promote responsible and respectful tourism, honoring the land and traditions of the native communities who occupy it, and ensuring sustainable practices for the benefit of present and future generations.

A Message FROM THE OLYMPIC PENINSULA VISITOR BUREAU

An actual call from a visitor from “the other Washington” (D.C.):

“Why can’t I find any accommodations on the Olympic Peninsula next week (in August)? That can’t be right. No one knows about the Olympic Peninsula – it’s a secret!”

Well, the secret is out, at least in the summer. Increased visitation to the region over the last few years has brought both blessings and new challenges to our region. Blessings in terms of eager new visitors, strong economic growth, and new business opportunities. Challenges in terms of greater summer crowds, novice adventurers, and workforce opportunities.

In late 2022, the Olympic Peninsula’s tourism industry felt the time had come to carefully examine the changing role the visitor economy plays in our region’s economic vitality, and to thoughtfully plan an appropriate path forward that takes into account not only the interests of the visitors, but equally important, the needs of our communities and our residents. There was a desire to create a stable year-round visitor economy which could support more full-time employment for locals and help level out some of the peaks and valleys. There was a desire to embrace new audiences, and to lean into promoting respectful, responsible tourism to the Olympic National Park and to our communities.

While the work of this Tourism Master Plan began with inspiration from area tourism industry and business leaders on the Olympic Peninsula, it was developed with a strong community-driven process. Under the guidance of the Olympic Peninsula Visitor Bureau and fostered by a Leadership Team representing diverse community voices, the resulting plan provides a road map for thoughtful, responsible growth for the Olympic Peninsula’s visitor economy over the next five years. It seeks to even out the seasonal variation, to create a more stable, year-round tourism economy that can support local businesses and workforce. It calls for a collaborative approach across municipalities, Tribes, business communities and citizens.

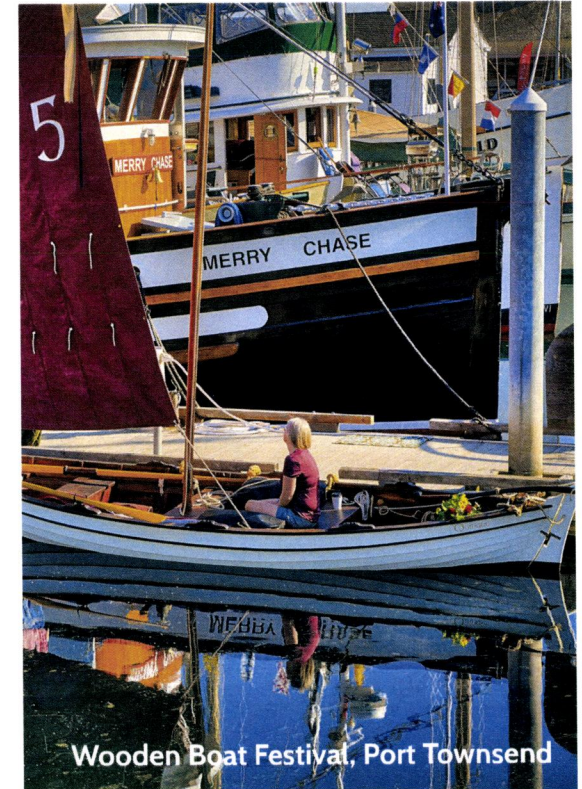
Using this Tourism Master Plan as a guide and committing to working collaboratively on the short-, mid- and long-term goals, we can build a thriving, year-round visitor economy, encourage responsible visitor engagement and create magical memories for our visitors. Together, we can walk thoughtfully into the future for tourism on the Olympic Peninsula.



Sincerely,

Marsha Massey

Executive Director
Olympic Peninsula Visitor Bureau
Olympic Peninsula Tourism Commission

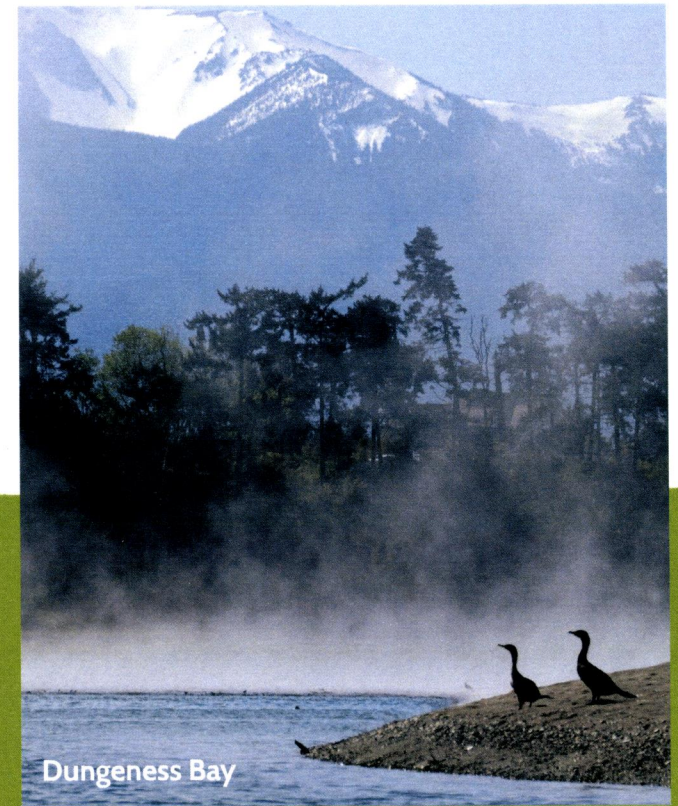


Purpose

The purpose of the 5-year Olympic Peninsula Tourism Master Plan is to create a more consistent, sustainable and vibrant year-round visitor economy, with an emphasis on increasing visitor spending in spring, fall and winter.

Many times during the development of this plan, residents stated, **"We're more than just a park."** Identifying what that "more" is, how to nurture it, and how to promote it was foundational for understanding how best to increase visitor revenue outside peak season and warmer months. Ultimately, the answers to those questions helped determine the plan's final strategic framework.

At the same time, the Olympic National Park anchors everything. It is the soul and beating heart of the Olympic Peninsula, and it infuses the visitor experience in some way for every traveler during every month. This plan is designed to celebrate and accentuate the overall park experience as well, for both visitors and residents.



Purpose

No one organization can accomplish everything in this document. It will take the public, private and civic sectors collaborating to lead strategic initiatives in three areas:

- 1 DESTINATION MARKETING:**
Improve, expand and diversify targeted seasonal promotions to elevate awareness of the Olympic Peninsula and the incredible variety of reasons to visit during every month of the year.
- 2 DESTINATION & COMMUNITY DEVELOPMENT:**
Create and/or enhance tourism infrastructure, visitor experiences, amenities and services to increase overall industry capacity to attract higher visitor spending during spring, fall and winter.
- 3 PUBLIC-PRIVATE SECTOR ALIGNMENT:**
Enhance how the tourism industry and local/regional governments work together to identify opportunities for local small business development and responsible growth around a shared vision for the future.



The genesis of the Olympic Peninsula Tourism Master Plan began in earnest following the impacts of the 2020 pandemic on travel to the Olympic Peninsula. Like most other destinations around the world, the Olympic Peninsula saw an initial sharp drop-off of visitors, but recovered fairly quickly as people were encouraged to spend time outdoors away from crowds. This influx of new travelers, primarily regional travelers, brought new challenges. The busy season was becoming even busier, and there was a need to encourage disbursement and develop a more year-round appeal for visitors.

In turn, this will have the benefit of evening out the peaks and valleys of local employment in the tourism sector. Tourism industry leaders recognized a need for a visionary plan to better guide future tourism development in a positive direction. **This plan lights the way forward.**

Shared PRIORITIES



The Olympic Peninsula Tourism Master Plan is dedicated to protecting the beauty and serenity that residents hold dear.

This word cloud was generated from what residents stated they love about living on the peninsula during four public town halls in 2023.

This plan isn't simply about increasing visitor spending outside peak season. It's about sustainably sharing the Olympic Peninsula's magic with like-minded visitors who respect the region's natural beauty and community spirit.

By nurturing authentic experiences and fostering responsible growth, the plan is designed to enhance life on the peninsula for everyone. A thriving visitor economy benefits residents beyond just increased spending. It also opens doors for artists/performers, chefs, wine/cider makers, brewers/distillers, farmers/growers, shop owners, the maker community and all types of entrepreneurs. It creates new jobs and opportunities for people of all ages within tourism and beyond, and it supports many businesses that would not be viable without visitors.

This plan is not about changing the Olympic Peninsula's soul.

It's about continually enhancing and sharing its magic responsibly to benefit the widest range of residents possible.

Tourism Master Plan LEADERSHIP TEAM

The process to develop the Olympic Peninsula Tourism Master Plan was overseen by the following members of the Tourism Master Plan Leadership Team. These industry and community leaders provided thoughtful direction, invaluable insights and a strong spirit of collaboration to ensure this plan represents the broad interests of the people living and working on the Olympic Peninsula.

Marc Abshire

Port Angeles Chamber of Commerce

Lissy Andros

Forks Chamber of Commerce

Ben Braudrick

City of Port Angeles

Sarah Copley

Puget Sound Express

Pam Dahl

Aramark / Lake Crescent Lodge

Commissioner Heidi Eisenhour

Jefferson County

Barbara Hanna

City of Sequim

Michele Jaeger

Olympic Peninsula Visitor Bureau Board
Greenhouse Inn by the Bay

Bria Miller

7 Cedars

Lorrie Mittmann

Peninsula Adventure Sports

Renee Rux

Quileute Tribe

Steve Shively

Olympic Culinary Loop
Jefferson County Tourism Coordinating Council

Jessica Wiersma

Black Ball Ferry Line

Marsha Massey

Olympic Peninsula Visitor Bureau
Olympic Peninsula Tourism Commission

Debbie Wardrop

DebbieWardrop LLC

The Olympic Peninsula Visitor Bureau would like to give special thanks to the key visionaries who initially embraced and supported the importance of developing a five-year tourism master plan, and gave this project wings:

- Greg Brotherton, County Commissioner, Jefferson County
- Mike French, former City Council Member, City of Port Angeles
- Randy Johnson, County Commissioner, Clallam County
- Ryan Malane, former Vice President Marketing, Black Ball Ferry Line (posthumous)

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Jé-Vonna Sampson, Director, Destination Planning

Deb Archer, Executive Consultant

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Dinete Thomas, Destination Development Consultant

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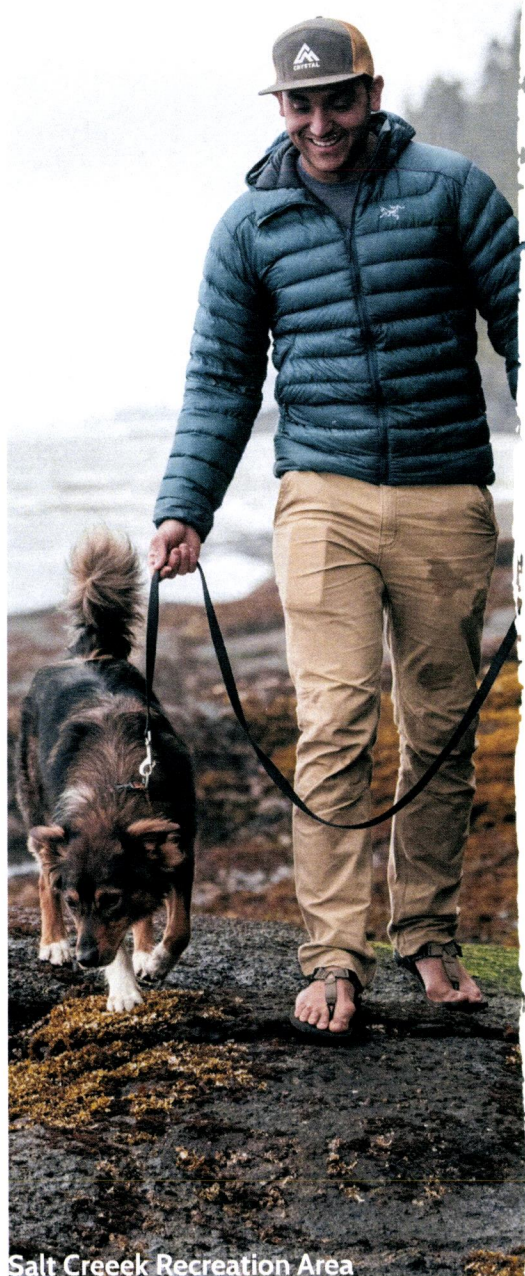
The Olympic Peninsula



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Cover photo: Hurricane Ridge, courtesy of Olympic Hiking Co.



Salt Creek Recreation Area



Executive SUMMARY

The Olympic Peninsula's visitor economy is robust and growing year-over-year, and there is exceptionally broad community support for the travel and tourism industry.

Overall, tourism was responsible for injecting \$979 million in visitor spending into the Olympic Peninsula's economy in 2022, based on data from Tourism Economics. According to the National Parks Service, the Olympic National Park was responsible for \$320 million of that visitor revenue.

Also, about 90% of residents state that travel and tourism is important for the Olympic Peninsula's general economy, according to a 2023 resident sentiment survey developed as part of this plan. That high level of support is important for embarking on a plan like this.

However, the vast majority of that tourism-related economic activity occurs during the summer.

Small business owners across the Olympic Peninsula report that spring and fall visitation has increased organically during the last decade, extending incrementally beyond the summer months year-over-year. That said, business owners emphasize that they require much more consistent, less spiky business throughout the year to ensure more predictable revenue and cash flow, hire and retain more quality employees, and support economic and community development in their neighborhoods.

The purpose of this 5-year Olympic Peninsula Tourism Master Plan is to create a more consistent, sustainable and vibrant year-round visitor economy with an emphasis on increasing visitor spending in spring, fall and winter — not summer peak season.

To accomplish that, the three overarching strategic goals in this plan focus on destination marketing, destination and community development, and public-private sector alignment.

Destination marketing includes initiatives to enhance promotional messaging and branding strategies to engage a broader cross-section of visitor audiences more effectively.

Destination and community development focuses on increasing industry capacity and enhancing visitor experiences specifically to attract more incremental spring, fall and winter visitation.

Public-private sector alignment is based on how well government and industry leaders collaborate at all levels to achieve shared success based on a long-term vision for the future.

Increasing visitation outside peak season is a long-term process that requires coordinated strategic planning and intentional collaboration in every municipality. There are many case studies where destinations with highly seasonal visitation have successfully optimized their visitor industry to drive tourism business during need periods.

Executive SUMMARY

STRATEGIC FRAMEWORK

The high-level strategic goals and actionable initiatives in this plan were entirely developed by people living on the Olympic Peninsula.

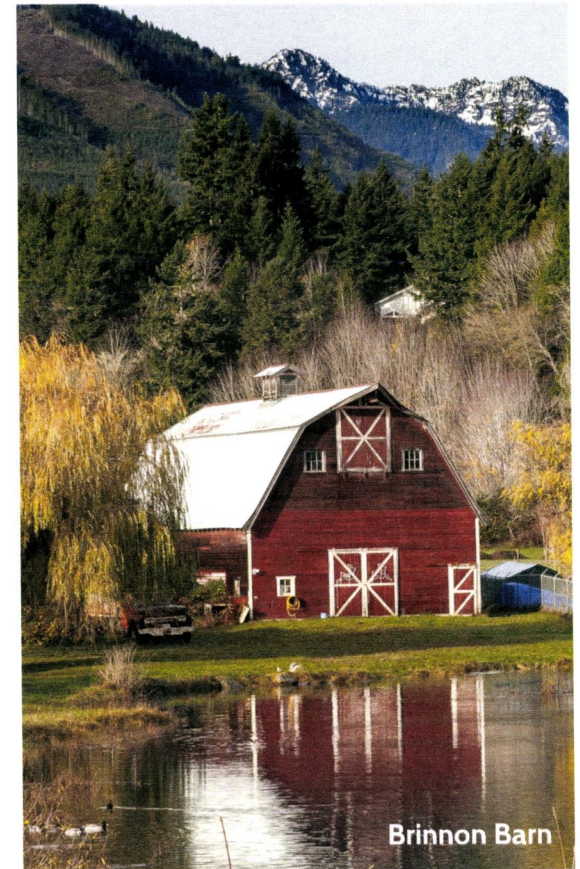
The consultants at MMGY NextFactor facilitated ten focus groups comprised of community and industry leaders; four town halls for residents in Port Townsend, Sequim, Port Angeles and Forks; more than 50 individual interviews; and a final Visioning Workshop with stakeholders in the public and private sectors. In addition, The Olympic Peninsula Visitor Bureau created a Tourism Master Plan Leadership Team, made up of industry and community stakeholders, who provided overall direction and strategic insights throughout the project.

Those community and industry engagement sessions were complemented with a proprietary DestinationNEXT Assessment that surveyed 168 regional stakeholders to evaluate how they perceive the performance of 24 different variables related to overall infrastructure and overall community/industry alignment. The MMGY team also produced a resident sentiment survey, which captured the many varying opinions from more than 1,400 area residents about what they prioritize related to the visitor economy.

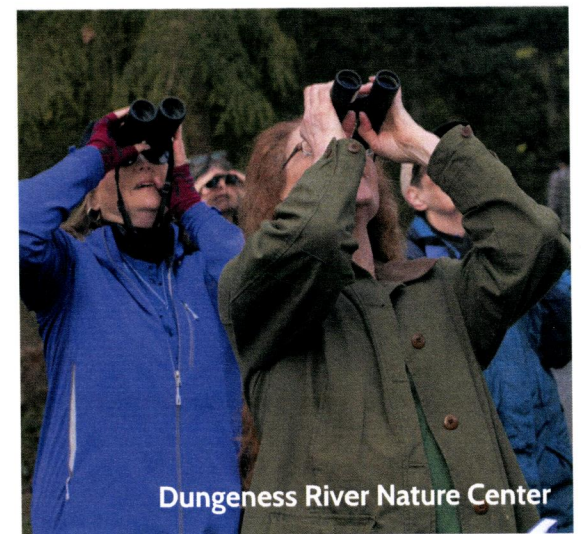
All that local insight and feedback contributed 100% to how the strategic goals and actionable initiatives were identified, debated, prioritized and written in this plan. That is critical to ensure the vast majority of the community buys into the plan's strategic direction so stakeholders are eager to work together to implement the initiatives.

The three key strategic goals in the Olympic Peninsula Tourism Master Plan are:

1. Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel seasons.
2. Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.
3. Increase government, community and industry alignment around sustainable tourism development.



Brinnon Barn



Dungeness River Nature Center

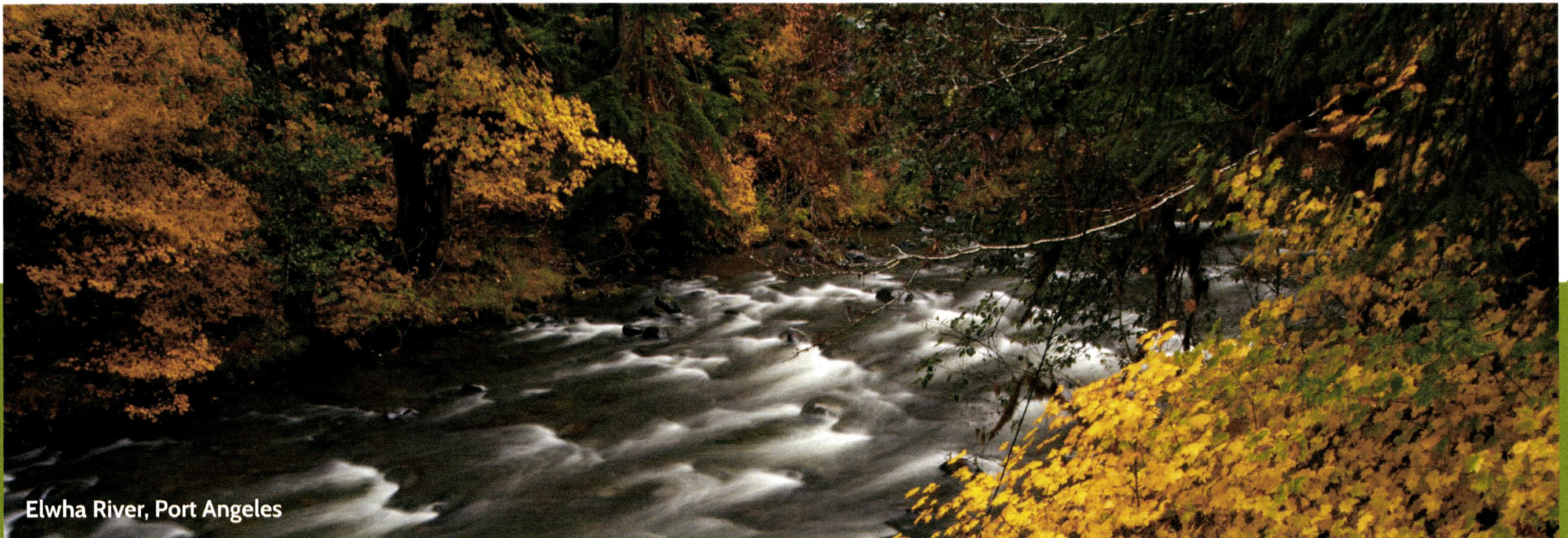
Executive SUMMARY

IMPLEMENTATION STRATEGY

There are a series of actionable initiatives for each of those three strategic goals. The success of any plan is only as good as the execution behind it. To implement those initiatives, there will need to be more intentional collaboration across the public and private sectors than ever before to accomplish what the majority of Olympic Peninsula residents have clearly stated they want in this plan.

To help guide the implementation strategy over the next five years, a separate series of work plans have been created. Each of the action items have short, medium or long-range timelines to help inform resource allocation. The initiatives have been prioritized based on what delivers the highest, earliest rewards for the lowest cost, as well as other factors such as the complexity of the task. There are also suggested coalitions of organizations that can work together to help move the plan forward. It will take local leaders in tourism and all other sectors to champion specific initiatives within the plan, coalesce support around them, and lead the necessary activities to accomplish them.

The three high-level goals should remain the same throughout the duration of the five-year timeline for this master plan. Meanwhile, the individual initiatives should be reviewed and reworked as necessary on an annual or bi-annual basis. That is to ensure that the Olympic Peninsula Tourism Master Plan is a living, continually relevant document that serves the needs of communities as effectively as possible.



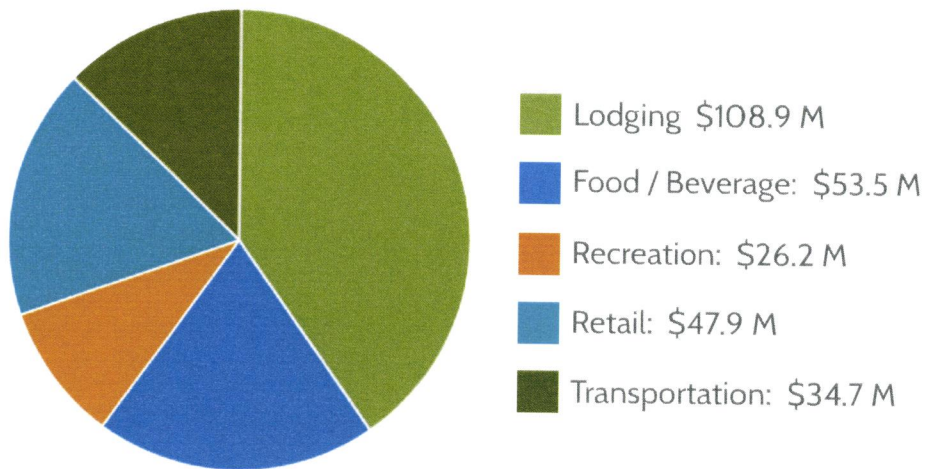
Elwha River, Port Angeles

Economic Impacts OF TOURISM

The tourism industry delivers enormous economic benefits for communities across the Olympic Peninsula. The following pages provide a high-level overview of visitor spending for Clallam County, Jefferson County, Mason County and Grays Harbor County. The dollar figures represent the 2022 calendar year, which were the latest available at the time of this plan's launch. (Source: *Tourism Economics*, as prepared for the *State of Washington Tourism*.)

2022 VALUE OF TOURISM TO CLALLAM COUNTY

\$271.2 M DIRECT VISITOR SPENDING



1,330,000 VISITS

\$23.4 M

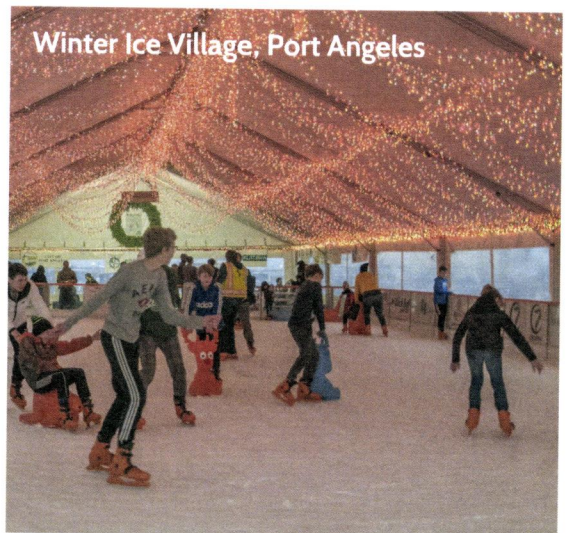
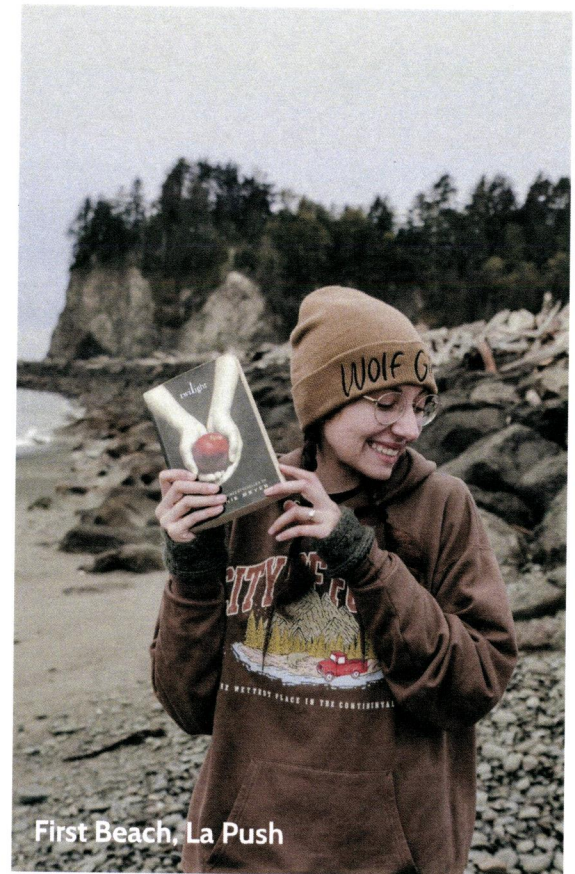
State/Local
Taxes Generated

1,837

Local
Employment

\$63.5 M

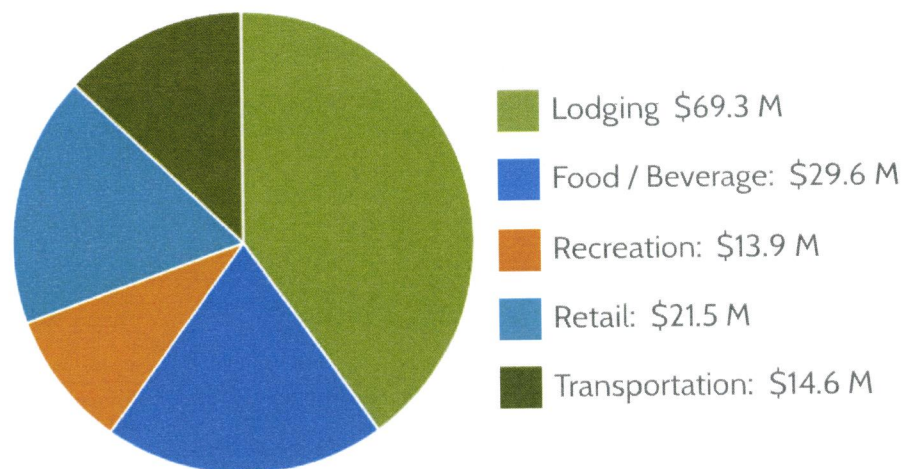
Local
Labor Income



Economic Impacts OF TOURISM

2022 VALUE OF TOURISM TO JEFFERSON COUNTY

\$148.9 M DIRECT VISITOR SPENDING



606,000 VISITS

\$13.1 M

State/Local
Taxes Generated

1,216

Local
Employment

\$43 M

Local
Labor Income

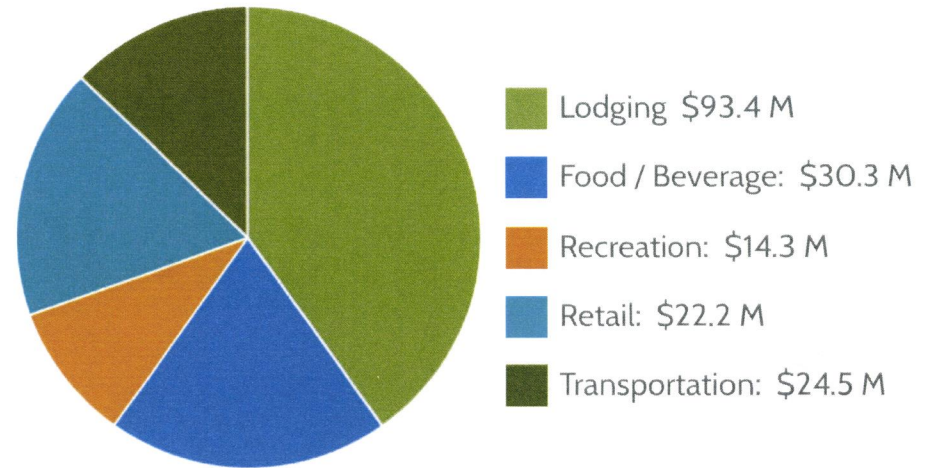


Economic Impacts OF TOURISM



2022 VALUE OF TOURISM TO MASON COUNTY

\$184.7 M DIRECT VISITOR SPENDING



1,180,000 VISITS

\$12 M
State/Local
Taxes Generated

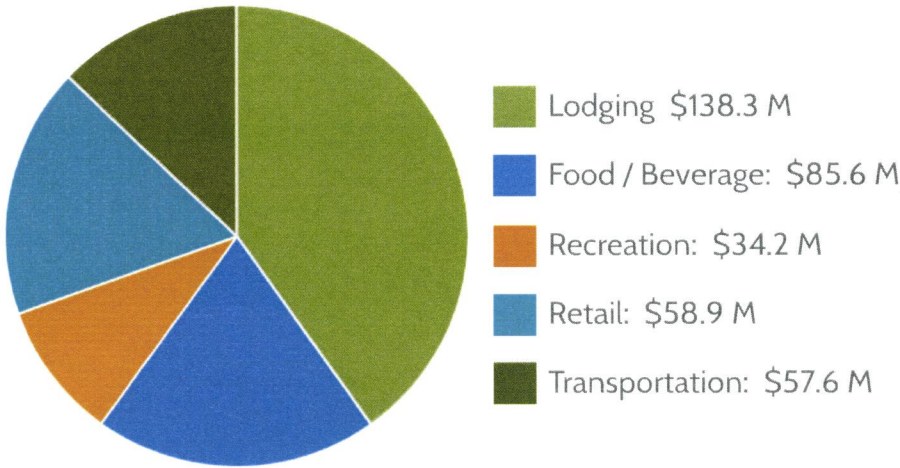
707
Local
Employment

\$35 M
Local
Labor Income

Economic Impacts OF TOURISM

THE VALUE OF TOURISM TO GRAYS HARBOR COUNTY

\$374.5 M DIRECT VISITOR SPENDING



1,550,000 VISITS

\$31.9 M
State/Local
Taxes Generated

3,219
Local
Employment

\$88.2 M
Local
Labor Income

Introduction

Perhaps no other region in the Northwest offers a history of such depth, nor a future ripe with so much potential.

- Tim McNulty, author of *"Salmon, Cedar, Rock, & Rain: Washington's Olympic Peninsula"*

Small business owners are the heroes of this plan.

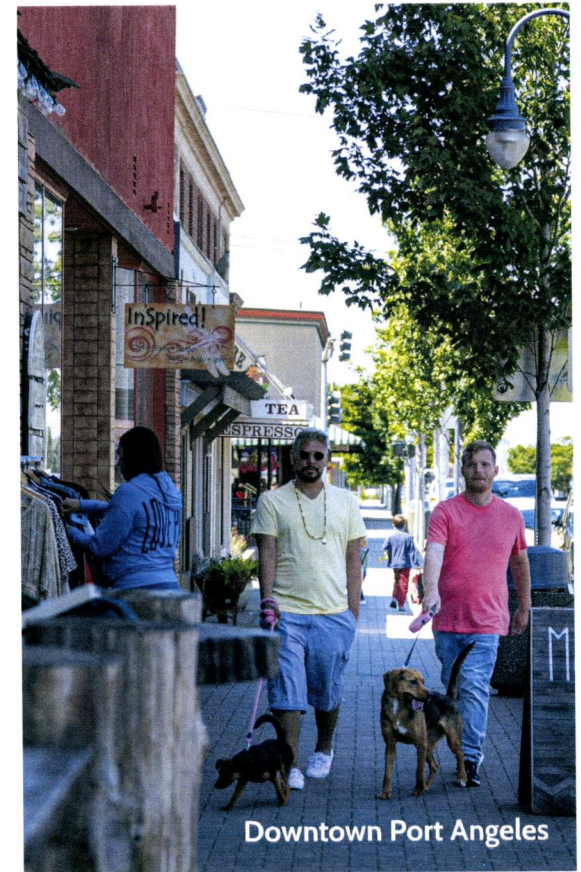
They are the many people living on the Olympic Peninsula who are investing their own money trying to build companies, hire and retain local employees, and make a positive impact in their community — economically and socially. They employ the majority of residents, and they contribute the most to county and municipal tax coffers, which pay for public infrastructure, services and amenities for everyone else.

Small businesses that cater to various consumer lifestyle pursuits are the backbone of the tourism economy. They are the companies selling products and services related to a wide variety of industries and experiences: food and beverage; arts and culture; Tribal heritage education; retail and entertainment; festivals and events; health and wellbeing; and sports and outdoor recreation.

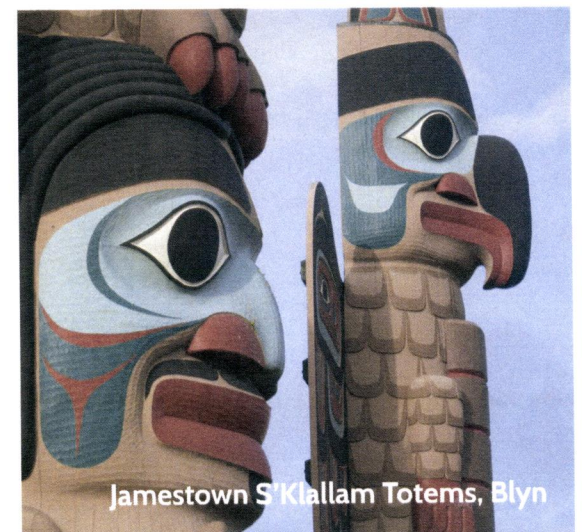
Many of these local businesses wouldn't be able to keep their doors open without visitors.

However, small business owners on the Olympic Peninsula face significant challenges year-round because the visitor economy booms exponentially in the summer and wanes as the months shift to shorter days and less predictable weather. That makes it incredibly difficult for business owners to staff their operations, order inventory and establish budgets. It is also daunting for local entrepreneurs to start new businesses, or expand them, which is critical for the success of any community if it wants to thrive and evolve for generations.

Therefore, that begs the question: How can community and industry leaders collaborate to attract more visitor business in spring, fall and winter to better balance the peninsula's year-round economy?



Downtown Port Angeles



Jamestown S'Klallam Totems, Blyn

Introduction

There are many good reasons to visit and explore the Olympic Peninsula year-round. The chance to escape a big city and breathe easier for a few days is not a summer-only thing. The challenge is that many people living off the peninsula are not aware of all those reasons — many of which are related to the aforementioned list of varied lifestyle pursuits.

In fact, more than a few residents stated during this project that outsiders — even people living nearby along the I-5 corridor — lack a basic awareness about the Olympic Peninsula in all kinds of ways. They're often not even aware of the sheer scope and size of the peninsula, let alone what to do there between October and May.

So.... If the main goal of this tourism master plan is to diversify when people visit the Olympic Peninsula, then the local tourism industry will need to prioritize two things:

- **Develop and diversify the type of experiences that will entice people to visit the peninsula outside summer.**
- **Develop and diversify storytelling that articulates what makes the Olympic Peninsula lifestyle so special outside summer.**

One of the interesting themes during the year-long process to produce this plan relates to how residents perceive where they live. A surprising number of residents questioned why anyone would want to visit outside peak season. If you take away the warm, sunny weather when people want to be outdoors most, what else is left?

There seemingly isn't always the appreciation of exactly just how special the peninsula is for travelers any time of year.



Washington State Ferry, Puget Sound

The reason for that is the local focus on the many challenges that Olympic Peninsula communities face. These concerns can sometimes cloud a local understanding of the visitor's perspective and the peninsula's unique vibe that attracts them.

An example of this is the visitor perception (and very often delight) at taking a ferry to the Olympic Peninsula. Think *Sleepless in Seattle* and the fun of riding a ferry in that film. While, in contrast, a resident's expectation and frustration when taking a ferry is often, "I'll just drive around and avoid the hassle."

From a visitor's point of view, they're enamored with a special energy that marries the Olympic Peninsula's small-town coastal lifestyle, the earthy and natural settings (some say "magical"), and the community values and spirit aligned with all that. Most importantly, for the purposes of this plan about increasing visitor revenue year-round, that local lifestyle and those values exist every month of the year.

Introduction

That is the common thread and underlying foundation for developing a more consistent year-round visitor economy. Enhancing ways for visitors to experience that energy all year, and delivering more messaging to visitors that shares and celebrates that vibe, is the core strategic direction for this tourism master plan.

Many other destinations in beautiful, natural environments have experienced similar seasonality challenges that small businesses on the Olympic Peninsula endure. At the same time, there are many places that have successfully diversified their visitor economy and attracted higher visitor spending outside their peak seasons. Notably, they have done so with the same collection of strategies.

They have developed and promoted a more comprehensive visitor destination that fully embraces the natural majesty and outdoor recreation opportunities, but they've expanded on that by developing and marketing more diverse, weather-independent lifestyle experiences. They have also leaned into developing and promoting outdoor experiences in cold or inclement weather. For the Olympic Peninsula, that includes activities ranging from the many types of snow-based experiences to storm watching on the Pacific Coast.

Quality of life is the selling point, which is a highly fluid perception for travelers. The pitch to visitors is about inviting them to come live a better life for a few days and enjoy the things they like to do, whatever those may be, from sampling local cider to shopping for local art to walking leisurely along a pier in a peaceful setting.

That strategy will increase the \$979 million in visitor spending annually across the Olympic Peninsula (2022 data; *Tourism Economics*). That is what will help small business owners between October and May for the long-term future.

THE PURSUIT OF LOYALTY

The most important business metric for any industry in any sector is consumer loyalty, otherwise known as Customer Lifetime Value. That applies as much to travel and tourism as it does to retail, food, automotive, sports, media, entertainment, and any other consumer industry.

The primary strategy for increasing loyalty is product quality and diversity. "Loyalty," from a travel industry perspective, means repeat visitation. The "product" is the overall visitor experience along the full industry supply chain, ranging from accommodations to activities.

Hotel, airline, cruise, car rental companies, etc., have developed loyalty programs to incentivize repeat purchasing, built on top of their digital distribution channels. Tourism boards and visitor bureaus, however,



Pacific Coast Beach

Introduction

don't have that type of online booking engine to collect visitor data and create loyalty programs nearly to the same degree. That means product quality and diversification is even more critically important if destinations want to increase their ratio of repeat visitors, or accelerate how often repeat visitors return.

So why is visitor loyalty so important for the Olympic Peninsula?

First, the purpose of the Olympic Peninsula Tourism Master Plan is to create a more consistent, sustainable and vibrant year-round visitor economy with an emphasis on increasing visitor spending outside peak summer season. First-time visitors often visit a destination during high season and explore the most popular places. Once they return and become more familiar with the destination, and learn about

the many types of people and experiences in the region, they begin to seek out different places and times of year to visit.

Many factors come into play that motivate that shift: Repeat visitors might want to escape the crowds and enjoy more peace and quiet, get better deals, experience other communities, and/or have what they might consider more “authentic” or local travel experiences. If the primary purpose of this tourism master plan is to increase seasonal and geographic visitor dispersal, then the repeat visitor is an especially high-value target visitor.

Second, repeat visitors tend to be more responsible travelers, which residents on the Olympic Peninsula often state is highly important to them.

Repeat visitors don't return because they want to feel like a tourist. They return because they identify with the community they're revisiting. They want to live like a local and feel like they're part of the community, temporarily. Therefore, they embrace the community's values, and they want to respect what's important to the community in order to feel like they belong and feel welcome.

The strategies in this plan prioritize what is proven to increase loyalty: product quality and product diversity. Naturally, continually improving and diversifying the visitor experience increases opportunities for attracting first-time visitors, as well.

If small business owners on the Olympic Peninsula want to move the needle and attract more spring, fall and winter visitation, then there needs to be concerted and collaborative efforts to encourage visitor loyalty. Increasing repeat visitation is imperative to increase year-round visitor revenues at scale.



Work Plan

MAR 2023 – MAR 2024



- MAR-APR 2023** Project planning to define purpose and engagement strategy
- APR-MAY 2023** Research of public and private sector development initiatives
- MAY 2023** Orientation trip to familiarize project team with local communities
- MAY-DEC 2023** Extensive community and industry engagement in various formats
- JUN 2023** In-destination meetings with Tribal leadership representatives
- JUN-AUG 2023** DestinationNEXT stakeholder assessment survey
- JUN-AUG 2023** Comprehensive Olympic Peninsula resident sentiment survey
- SEP 2023** Resident town halls in Port Townsend, Sequim, Port Angeles and Forks
- NOV 2023** In-destination visioning workshop with industry/community leaders
- NOV-DEC 2023** Draft development of the Olympic Peninsula Tourism Master Plan
- JAN-FEB 2024** Review and validation with the Tourism Master Plan Leadership Team
- FEB-MAR 2024** Development of implementation strategy and work plans

Community & Industry ENGAGEMENT

The future success of the Olympic Peninsula's visitor economy — and the growth of direct and indirect benefits it provides for communities — depends on the public and private sectors collaborating. It requires visionaries and champions joining forces across the Olympic Peninsula to develop and execute a shared vision for the future that supports managed visitor growth while continually enhancing the destination as a healthy, dynamic and productive place for all residents to live, work and play.

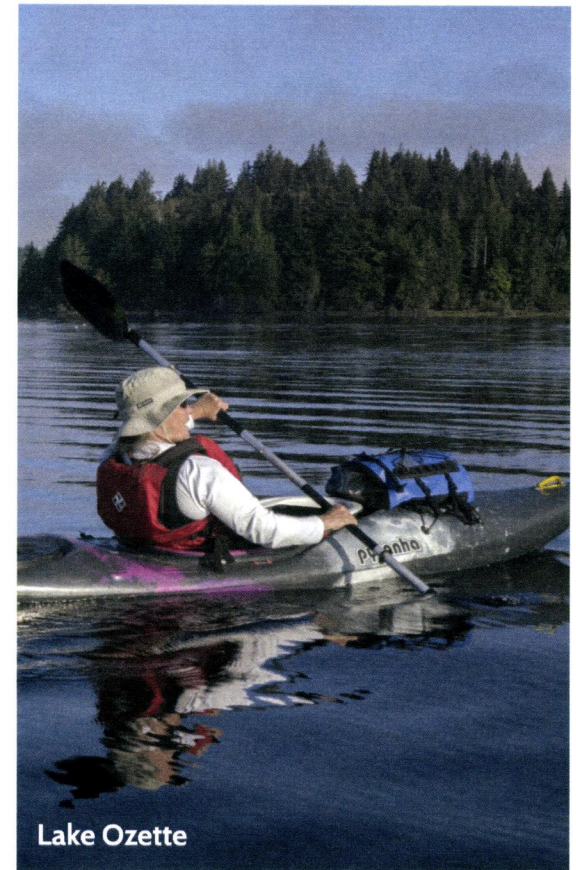
From March 2023 through February 2024, the Olympic Peninsula Visitor Bureau and MMGY NextFactor consultancy led the development of this 5-year Olympic Peninsula Tourism Master Plan. The process was guided by the Tourism Master Plan Leadership Team, which was created with a diverse array of public and private sector stakeholders to provide local knowledge, develop strategy and build community support for the project.

The process to develop the Olympic Peninsula's Tourism Master Plan included a DestinationNEXT Assessment to evaluate the overall strength of the destination's visitor experience and level of industry/community alignment. The process also included ten focus groups with various industry and community segments, more than 50 one-on-one interviews, four resident town halls, and one resident sentiment survey.

The primary objective of the engagement discussions was to identify key opportunities for the future of the Olympic Peninsula's economic and community development as it relates to growing non-peak visitation and enhancing the overall destination experience for both residents and visitors.

COMMUNITY & INDUSTRY ENGAGEMENT FORMATS

- DestinationNEXT Stakeholder Assessment (168 Survey Participants)
- Ten Focus Groups with Industry and Community Stakeholders
- 50+ Individual Interviews with Industry and Community Stakeholders
- Four Resident Town Halls in Port Townsend, Sequim, Port Angeles and Forks
- Resident Sentiment Survey (1,440 Participants)
- Visioning Workshop

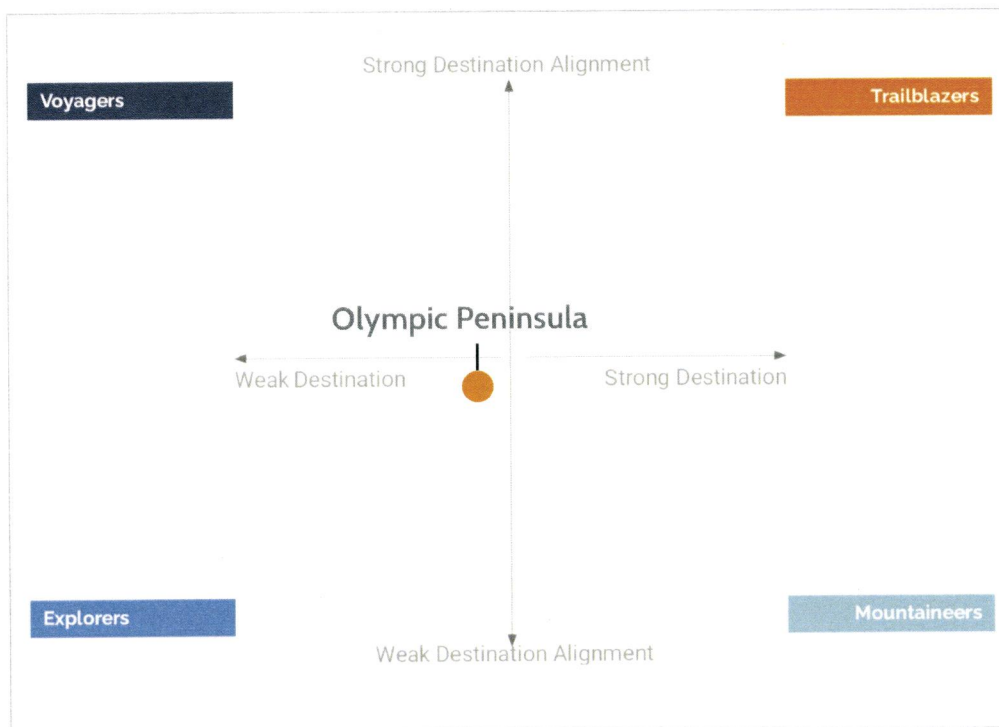


Lake Ozette



Sun Fun
Color Run,
Sequim

DestinationNEXT STAKEHOLDER ASSESSMENT



A total of 168 local industry and community stakeholders participated in the Olympic Peninsula DestinationNEXT industry assessment survey in summer 2023.

The results placed the region as slightly below the industry average in terms of both destination strength and destination/community alignment. Those results were anticipated due to the Olympic Peninsula's capacity and infrastructure challenges, the sheer scope of the region, and the multitude of county/municipal governments, chambers of commerce, tourism organizations and various other entities responsible for developing and promoting the visitor economy.

Developed by MMGY NextFactor, the comprehensive DestinationNEXT Stakeholder Assessment Tool is a global tourism industry standard designed to empirically measure how a specific destination's visitor economy is performing across a wide spectrum of indicators.

The methodology incorporates an in-depth survey of government officials, tourism leaders, community organizations, business owners and other key stakeholders. The survey questions focus on 24 different variables related to overall destination strength, including visitor industry infrastructure, experiences and services, and overall destination alignment, focusing on how well government, community and industry leaders work together.

The survey data is then plotted into a 4-quadrant scenario model that compares the destination with more than 350 DestinationNEXT assessments in other communities. The results provide valuable business intelligence identifying the greatest opportunities and challenges for the area's visitor economy.

The crosshairs of the X/Y axes above is the average of all the destination assessments to date conducted by the MMGY NextFactor project team.

DestinationNEXT STAKEHOLDER ASSESSMENT

The following are the highest and lowest ranked variables in the Olympic Peninsula DestinationNEXT 2023 survey:

Highest ranked destination strength variables (out of 5)

Outdoor Recreation	4.38
Attractions & Experiences	4.17
Arts, Culture & Heritage	3.66
Events & Festivals	3.57
Conventions & Meetings	3.49

Lowest ranked destination strength variables (out of 5)

Accommodations	2.96
Communication Infrastructure	2.95
Dining, Shopping & Entertainment	2.86
Local Mobility & Access	2.80
Destination Access	2.63

Highest ranked destination alignment variables (out of 5)

Organization Governance	3.78
Regional Cooperation	3.77
Business Support	3.74
Government Support	3.74
Sustainability & Resilience	3.71

Lowest ranked destination alignment variables (out of 5)

Community Support	3.55
Emergency Preparedness	3.52
Funding Support & Certainty	3.42
Hospitality Culture	3.12
Workforce Development	2.27

DESTINATIONNEXT VARIABLES

The DestinationNEXT survey questions are organized by:

- 12 variables related to destination strength, which gauge the quality of infrastructure, amenities, services, and the overall visitor experience
- 12 variables related to destination alignment, which identify the degree of how industry, government and community stakeholders share support for the visitor economy

Destination Strength

- Accommodations
- Attractions & Experiences
- Arts, Culture & Heritage
- Communication Infrastructure
- Destination Access
- Dining, Shopping & Entertainment
- Health & Safety
- Events & Festivals
- Local Mobility & Access
- Meetings & Conventions
- Outdoor Recreation
- Sports Tourism & Events

Destination Alignment

- Business Support
- Community Support
- Economic Development
- Emergency Preparedness
- Equity, Diversity & Inclusion
- Funding Support & Certainty
- Government Support
- Hospitality Culture
- Organization Governance
- Regional Cooperation
- Sustainability & Resilience
- Workforce Development

Resident Sentiment SURVEY

In summer 2023, the Olympic Peninsula Visitor Bureau launched an online survey to assess residents' sentiment regarding a wide variety of themes, including how they perceive the value of tourism on their lives and livelihoods. In the span of three months, the survey captured more than 1,440 responses, which is a higher-than-average response rate for the total population compared to many other similar regional destinations.

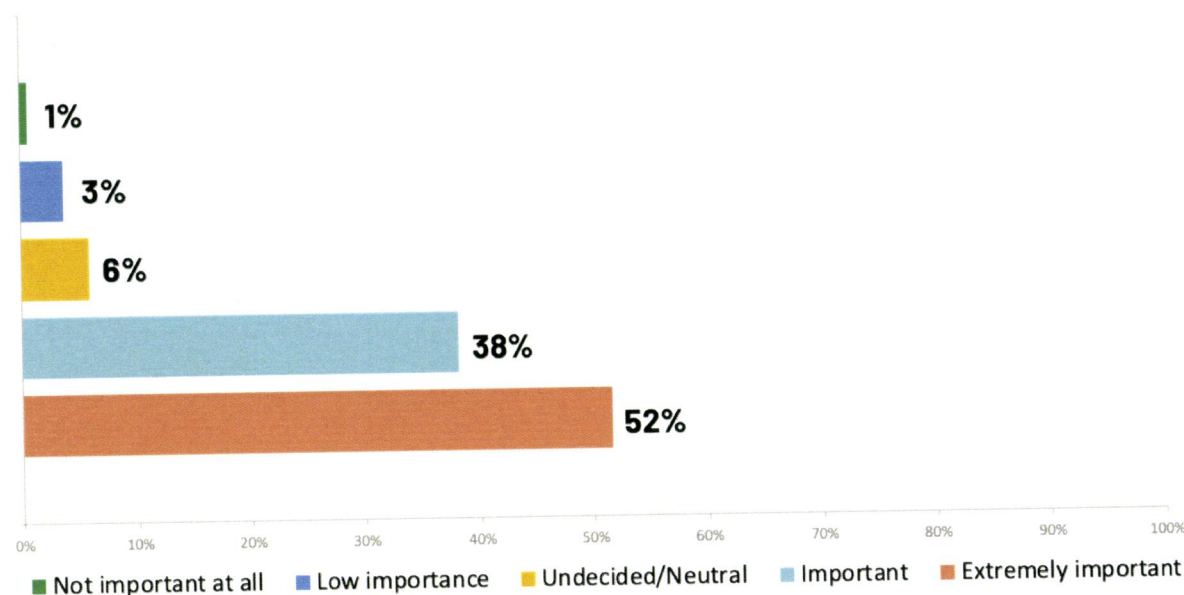
The value of a resident sentiment survey is that it establishes benchmarks for future surveys to help evaluate the success of industry strategies year-over-year. Tracking changes from one survey to the next provides empirical evidence to inform changes in strategic direction.

The following is a sample of the responses in the 2023 resident survey.

How would you rate the importance of tourism on the Olympic Peninsula economy?

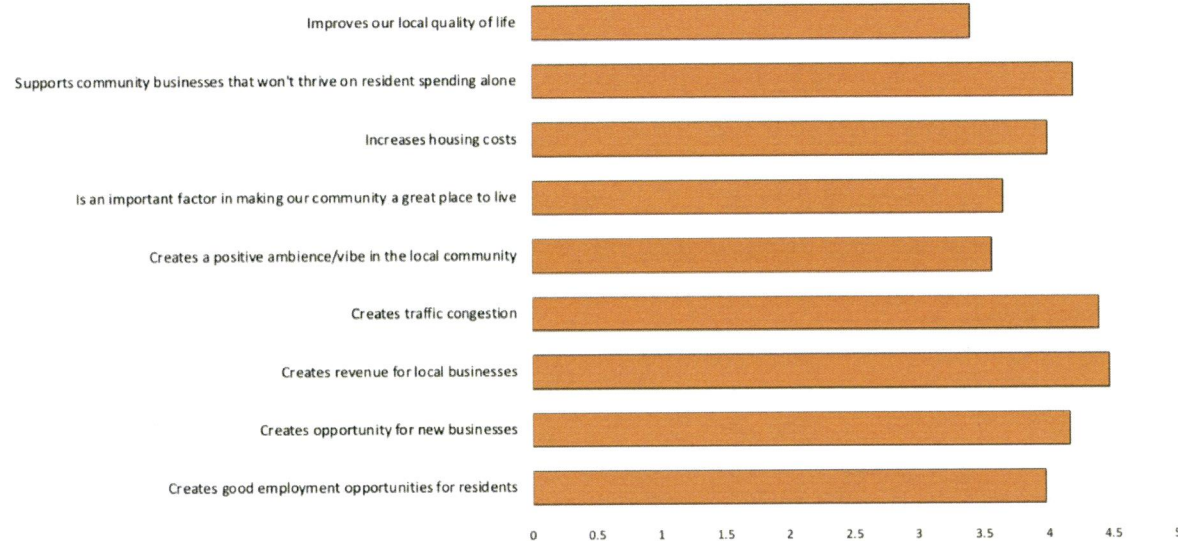
Over 90% of residents consider tourism to be an important (38%) or extremely important (52%) contributor to the Olympic Peninsula economy.

This is critically valuable insight because the success of this tourism master plan hinges on how well communities come together to develop the visitor economy for the long-term that balances economic growth for small business year-round and overall quality of life for residents.



Resident Sentiment SURVEY

From your perspective, to what extent do you agree or disagree with each of these statements? Tourism on the Olympic Peninsula...



There are a number of statements here that ranked four, or near four, out of five that highlight where there is widespread agreement among residents.

The greatest consensus is that tourism creates revenue for local businesses; it provides opportunities to start new businesses; and many local businesses could not survive without tourism.

At the same time, residents caution that tourism creates traffic congestion, which is why this plan prioritizes tourism development in spring, fall and winter.

Please indicate your level of agreement with the following statements...



One of the highest levels of consensus in the resident sentiment survey was support for the idea that the Olympic Peninsula Visitor Bureau should encourage locals to explore their own backyard.

That strategy is a key part of this tourism master plan. There is also a relatively high agreement that the positive benefits of tourism outweigh the negative impacts, but ideally this number should be higher in future resident surveys. Enhancing advocacy efforts, increasing community messaging and sharing more economic development data will help in this regard.

Resident Ideas FOR DESTINATION DEVELOPMENT

Attempting to develop the Olympic Peninsula in ways that attract more visitors in spring, fall and winter is a sustained long-term process that requires significant collaboration and resources to accomplish. It also requires a lot of input from stakeholders and residents. Therefore, all the different community and industry engagement sessions/surveys during this project asked for ideas about what types of demand generators will actually help drive visitation to the peninsula outside summer peak season. The following suggestions, in no particular order, are a summary of the feedback received from area residents.

INFRASTRUCTURE DEVELOPMENT

- Continue to develop and enhance the Olympic Discovery Trail experience for people of all ages and abilities
- Redevelop Hurricane Ridge Lodge as a full-service visitor experience
- Increase shuttle service options for key visitor attractions, including Hurricane Ridge and Hoh Rain Forest
- Expand and diversify year-round accommodation options
- Expand agritourism ecosystem, including lavender farms, fish markets, farmers markets, etc.
- Develop and brand the Olympic Peninsula Loop around Highway 101
- Advocate for significant improvements across the full WA state ferry network
- Expand modes of transportation around the peninsula
- Expand wayfinding and signage throughout the peninsula
- Expand e-bike infrastructure and businesses
- Develop more indoor venues for sports and entertainment
- Develop downtown mural district and experiences to engage creative/maker community in Port Angeles
- Expand and promote EV charging station network
- Develop more affordable workforce housing
- Explore air service development opportunities

EXPERIENCE DEVELOPMENT

- Incentivize and streamline small business development in the tours and activities segment, including support for more local guides
- Expand Culinary Loop to encompass all relevant businesses and experiences, and to elevate the “Olympic Coastal Cuisine” brand
- Develop group experiences that cater to weddings, corporate retreats, social groups and other niche segments
- Develop sample itineraries specific to various visitor lifestyle segments, especially for food and beverage; arts, culture and heritage; and health and wellbeing, etc.
- Develop Dark Night Sky and storm watching events
- Further develop specific holiday programming and experiences
- Produce more performances and concerts
- Increase Tribal education experiences
- Develop more night-time and nightlife experiences, with a focus on developing a robust live music scene
- Expand options for skiing, snowshoeing, skating and other snow experiences
- Develop more golf and marina-based events and experiences
- Develop hunting and river fishing experiences
- Develop incentive/reward program for local residents to motivate them to explore their own backyard
- Prepare for the robust return of the International Visitor

Key Engagement TAKEAWAYS

The following 12 key takeaways were culled from all the strategic insights gathered during the focus groups, town halls, individual interviews, the DestinationNEXT Assessment and the resident sentiment survey. They provide a high-level prioritization of major opportunities and challenges for the Olympic Peninsula's visitor economy, both short and long term. This process is a critical phase to see where there's the greatest consensus in the community to help develop the final strategic framework.

1

YEAR-ROUND VIBRANCY IS JOB #1

During the four town halls, the communities were unanimous in their support for developing a more consistent and diversified four-season visitor economy. More demand generators are needed to attract more visitor dollars during spring, fall and winter. Extending tourism beyond the Olympic Peninsula's traditional peak season is vital for sustained economic growth. This will create year-round demand that helps foster more consistent employment and long-term economic stability.

2

"WE'RE MORE THAN JUST A PARK"

Residents wholeheartedly expressed that what they love about living on the peninsula is the variety, energy, distinctiveness and colorful nature of their communities — as well as the peaceful natural surroundings. **"We're more than just a park"** was a constant talking point among residents. To attract more visitors to the Olympic Peninsula outside warmer months when people typically visit a national park, there needs to be a clear definition of what that "more" is, how to continually enhance it, and how to sell it to the traveling public.



Hurricane Ridge, Olympic National Park

Key Engagement TAKEAWAYS

3

CREATE AN EXPANDED NARRATIVE

Increasing visitor spending beyond high season will require vibrant messaging strategies targeting a much broader range of visitor lifestyle segments. Recognizing the evolving landscape of travel preferences, the peninsula's success lies in capturing a diverse group of visitors, particularly lifestyle travelers who seek authentic local and immersive experiences related to culinary, culture, etc. To accomplish that, the industry needs to leverage the distinctive community vibes of different locales and highlight the ways they cater to a range of lifestyle interests and values.

4

ADDRESS PERCEIVED REMOTENESS

The Olympic Peninsula is unique in the U.S. with a diverse and awe-inspiring mix of natural environments and intriguing communities with their own distinct personalities. The challenge for the region's visitor economy is the perceived remoteness. Many residents have suggested that the tourism industry should emphasize how the Olympic Peninsula is closer and more convenient to access than most people believe. And, they felt, this should be an immediate priority.

5

ONE DESTINATION BRAND

The Olympic Peninsula is the signature brand for the region. The communities, attractions, national park, the natural environment, etc., are obviously all key demand drivers. However, they all fall under the Olympic Peninsula brand from an overarching destination marketing and visitor perspective. Marketing always needs to be developed through a consumer lens. It is critical for all communities and attractions to embrace the Olympic Peninsula brand in order to expand the region's appeal and diversify its reputation for a broader base of visitor segments.

6

LOCALS SUPPORT TOURISM BIG TIME

Over 90% of residents think the annual \$979 million visitor economy (2022) is "Very Important" or "Important" for the Olympic Peninsula. At the same time, most of the residents want the tourism industry to develop dedicated educational messaging for visitors about how to be more responsible travelers. That balance needs to be top of mind. While residents understand the value of tourism for the local economy, they very much want to protect and improve the quality of life enjoyed in this beautiful location. Resident surveys should be conducted at least every two years to gauge shifts in sentiment.

Sol Duc Falls,
Olympic National Park



Key Engagement TAKEAWAYS

7

THE OLYMPIC PENINSULA LIFESTYLE

Food and beverage, arts and culture, health and wellness, events and festivals, Tribal tourism, and niche group travel are major growth opportunities for driving business during need periods, in addition to outdoor recreation. These consumer lifestyle segments also align with high household incomes, and they don't rely on the weather. There is a lot of opportunity to define the Olympic Peninsula lifestyle and share that with the world to expand the destination brand and make it resonate with a broader group of potential visitor segments.

8

TRIBAL TOURISM DEVELOPMENT

There is keen interest in developing Tribal tourism experiences across the industry and within the individual Tribes. And there are significant and sensitive questions about how to do that responsibly and effectively. Tribal leaders have recommended that the industry work with existing Tribal cultural venues and experiences to develop more programming and experiences. There are also some Tribes that are exploring how to customize internal educational programs in ways that are appropriate for visitors to experience.

9

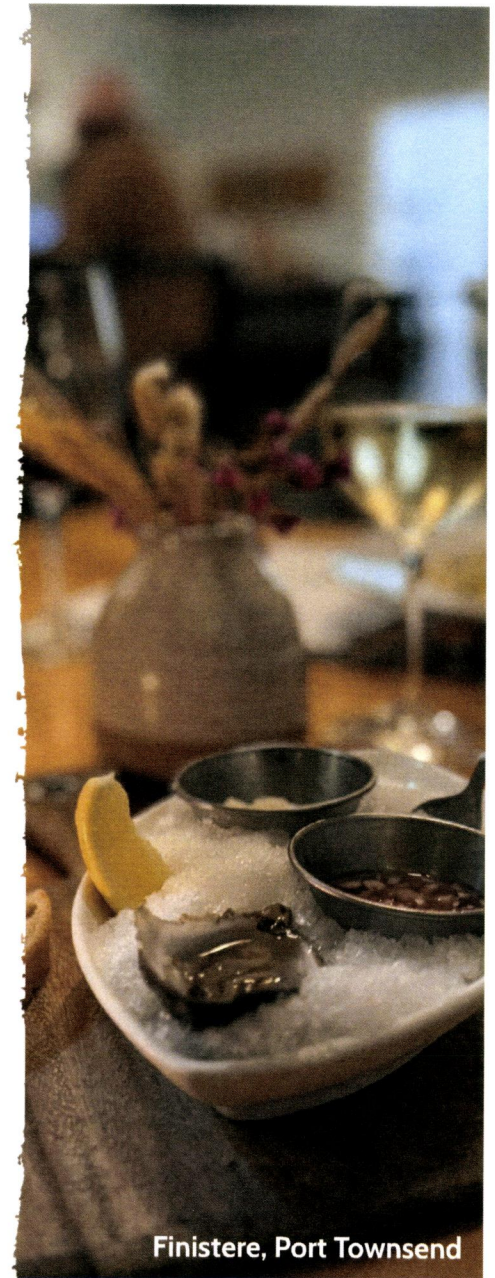
INFRASTRUCTURE & AMENITY UPGRADES

A wide variety of infrastructure improvements are needed to accelerate small business development, improve the visitor experience and enhance local quality of life. Industry stakeholders and residents are advocating for better roads, signage and wayfinding; upgraded trails, trail maintenance and new trail development; and more public facilities across the peninsula. There are also considerable benefits for developing uniform Olympic Peninsula branding for all visitor information centers, supplemented with the name of the individual destination, to strengthen sense of place and encourage more visitors to enter.

10

MOBILITY AND TRANSPORTATION

There is widespread demand to improve multi-modal transportation options, both for getting to the Olympic Peninsula and traveling throughout. This is especially exasperated during summer peak-travel season, which is one of the reasons why this plan is focused on increasing spring, fall and winter travel. Developing new public and private transportation in a seasonal economy is a "chicken and egg" issue. Stronger year-round visitor revenue helps validate investments in transportation infrastructure and equipment, but at the same time, better options for people getting from place to place will build more year-round business.



Finistere, Port Townsend

Key Engagement TAKEAWAYS

11

WASHINGTON STATE FERRIES

Residents had a lot to say about ferry service to and from the peninsula during the focus groups and town halls. For residents who rely on ferries to commute to work, the issues are real. That said, while new ferries are not expected to come online until 2028, Washington State Ferries will be aggressively hiring new crewmembers during the next few years that will help improve service and reliability in the short term. The purpose of this plan, however, is to capitalize on the much more positive sentiment from visitors, and to emphasize to them that the journey to the peninsula can be a big part of the overall experience.

12

WORKFORCE HOUSING & DEVELOPMENT

The lack of places to live and people to employ on the Olympic Peninsula was one of the most common laments throughout the community and industry engagement process to identify challenges and opportunities for the visitor economy. This is a national problem, which accelerated significantly coming out of the Covid pandemic. Work preferences, especially among youth, have changed forever. Therefore, this must be a priority consideration for how the Olympic Peninsula addresses concerns about young people moving away from the peninsula.



Lake Crescent, Olympic National Park

Strategic FRAMEWORK

The full scope of destination research and community/industry engagement during the development of the Olympic Peninsula Tourism Master Plan provided the foundation for the final strategic framework. The three primary strategic goals each have a series of actionable initiatives that are designed to achieve the priorities put forth by the majority of industry stakeholders, community leaders and residents.

The three primary strategic goals have been developed intentionally to identify and prioritize the varying roles and levels of participation for the Olympic Peninsula Visitor Bureau (OPVB), its marketing collaborative group, the Olympic Peninsula Tourism Commission (OPTC), and the rest of the travel and tourism industry. Those degrees of participation include: Lead and Co-lead; Convene and Support; and Influence & Enable.

- **GOAL #1** / DESTINATION MARKETING (LEAD & CO-LEAD)
- **GOAL #2** / DESTINATION & COMMUNITY DEVELOPMENT (CONVENE & SUPPORT)
- **GOAL #3** / PUBLIC-PRIVATE SECTOR ALIGNMENT (INFLUENCE & ENABLE)

GOAL #1

Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel.

The OPVB/OPTC and tourism industry partners are responsible for leading and co-leading initiatives and providing seed funding and resources, and the tourism industry is accountable for performance metrics. The OPVB will need to rely on input and resources from public/private partners to develop optimal collaborative marketing strategy.

GOAL #2

Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.

The OPVB/OPTC are collaborators and conveners to implement initiatives. Sometimes the organization will provide resources where appropriate. Other times, it is there to support stakeholders and inform development strategy. The organization's full aggregate of partner relationships and insights into visitor motivations and spending behaviors is a key asset for investment decisions.

GOAL #3

Increase government, community and industry alignment around sustainable tourism development.

The OPVB/OPTC need to have a seat at the table to help tackle some of the most challenging issues for county and municipal governments. The organization can provide data and business intelligence to influence policy development that further enables small business development across the visitor industry.



GOAL #1 DESTINATION MARKETING

Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel.

The lowest hanging fruit to drive visitor spending in spring, fall and winter on the Olympic Peninsula over the short term involves marketing, branding, public relations and messaging strategy. That includes everything from updating the **olympicpeninsula.org** website to producing more content for specific visitor lifestyle segments to acquiring modern tourism industry data management platforms.

Effectively delivering on that requires a few high-level transformations. Those include municipalities embracing the Olympic Peninsula as the top-level brand, restructuring the Olympic Peninsula Visitor Bureau, and identifying new and profitable visitor segments specifically for shoulder season and winter travel.

THE OLYMPIC PENINSULA IS THE BRAND

A major takeaway from all the research and engagement to develop this plan highlighted how the Olympic Peninsula has so many different types of communities.

Residents emphasized over and over that the Olympic Peninsula is not one single destination. They also said the Olympic Peninsula is about much more than the Olympic National Park and its incredible majesty.

Rather, they argued, the Olympic Peninsula is a vast mosaic of communities, each with dynamic personalities and diverse, individual identities. At the same time, many residents expressed how they do share common values related to their relationship with the outdoors, so there's a very interesting and layered mix of vibes to cherish.

That wide variety of identities is one of the great aspects of living on the Olympic Peninsula because people can find a place to call home that's best aligned with their personal and professional interests. Visitors are looking for the same thing, especially repeat visitors.

From a tourism perspective, a lot of various municipalities, counties, businesses and events on the Olympic Peninsula are producing a variety of promotional materials and distributing them directly to their audiences. However, all those varying information sources can contribute to a fractured message for people who live outside the area, even if they've visited before. This is a common issue in travel destinations with multiple jurisdictions, each with their own funding sources, tourism industry marketing agencies, and government structures.

GOAL #1 DESTINATION MARKETING

Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel.

With any destination that has such a multi-jurisdictional makeup, it is critical to have one overarching brand and uniform brand messaging to present to the world. The Olympic Peninsula is the brand. All the municipalities and attractions are sub-brands that roll up under the main brand.

The reasons for this are many. One is to expand awareness beyond the local drive market. People living along the I-5 corridor might be aware of the Olympic Peninsula and some of the towns within it (although even then many are not aware of the sheer size of the peninsula and all it offers). But for many more potential visitors, the Olympic Peninsula is still somewhat of an unknown. That was a common theme in many community/industry engagement sessions.

Also, a “top-of-the-funnel” marketing approach promoting the Olympic Peninsula as the signature brand is a basic marketing strategy to get people excited about the peninsula first and foremost. A strong

Olympic Peninsula brand can act like a lighthouse illuminating the entire region with high-level storytelling and marketing messaging that all municipalities and attractions can leverage and share. This type of strategic marketing direction can be achieved in part through both effective advertising and dynamic public relations efforts.

ORGANIZATIONAL STRUCTURE

Currently, the organizational and funding structure of the Olympic Peninsula Visitor Bureau (OPVB) and Olympic Peninsula Tourism Commission (OPTC) is not as efficient as it might be. The OPVB is attempting to work like a typical regional destination marketing and management organization, but it's not built or funded like one. A majority of public and private sector stakeholders at the county and municipal levels agree on this, and many have stated they are open to developing a new organizational structure with a more integrated funding model.



GOAL #1 DESTINATION MARKETING

Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel.

This is the most important initiative in this plan because it supports or influences every other strategy and action item. An overhaul of the structure also includes hiring additional personnel to help execute this plan, deliver intended outcomes, and track and share progress. Specifically, those positions include talent for content development and new business development. There is also a need to upgrade to a more modern website built to today's standards with new data management systems that better identify visitor traffic flows, source markets, conversion triggers, etc.

COMMUNITY/INDUSTRY PARTNERSHIP

There is a wide range of local and regional organizations that can develop co-op marketing initiatives to promote the Olympic Peninsula brand at a macro level, which the individual municipalities can adopt and customize for their local partners. Historically, the OPVB/OPTC and their visitor industry partners have been successful in working collaboratively for the benefit of the individual communities and their small business development progress.

The actionable initiatives relevant to this topic include expanding on that success by deepening the collaborations with gateway partners outside the peninsula, such as the State of Washington Tourism, Port of Seattle and Visit Seattle, and bringing appropriate new partners into the mix.

Something interesting happened during the series of four town halls where any and all residents were asked to share their ideas. Multiple times people mentioned that their communities shouldn't have to bring in outside consultants for residents to get together to identify shared goals. In that vein, there are recommendations in this plan to reinstate the Annual Regional Tourism Summit and locally organize more community forums like the town halls.

TARGETED MARKETING

There is a long list of initiatives in this strategic goal related to targeted marketing because custom content is key to driving incremental visitor volumes in spring, fall and winter.



GOAL #1 DESTINATION MARKETING

Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel.

A sample of specific, high-value target audiences who are more likely to travel outside peak season are local residents, lifestyle travelers, niche group travelers and sporting event participants. All these visitor segments are often seeking to travel during slower seasons.

Also, the Olympic Peninsula Visitor Bureau will find eager support across the region to help co-develop educational content directed at visitors about how to be more responsible travelers. Residents have been very vocal about this. However, to make a difference over the long term, this type of content development needs to be well-funded and sustained, with significant buy-in from all types of industry and community partners so everyone is sharing the same messages.

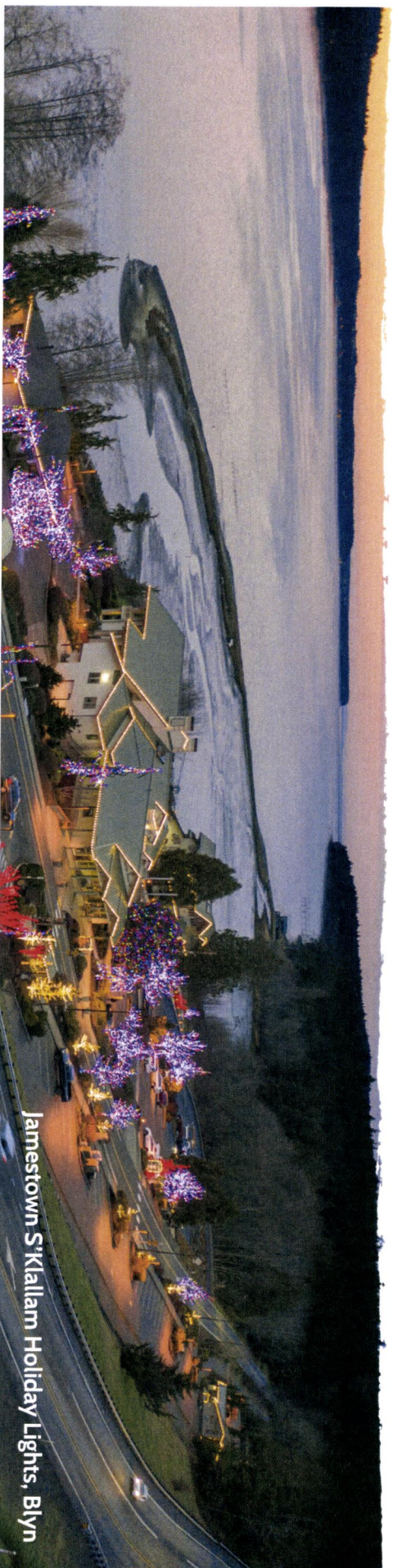
NEW BUSINESS DEVELOPMENT

There are a number of opportunities for tapping new group travel business, which often happens midweek and during slower times of the year when local small businesses need the revenue most. This

includes a wide variety of potential visitor groups, including small corporate retreats and affinity groups. It was somewhat surprising just how often industry stakeholders advocated for going after corporate group business. Their motivation is to capitalize further on these types of groups' traditional non-peak travel patterns and their higher than average visitor spending.

Many other group segments are also targeted in this plan. Sports tourism is one of the fastest growing visitor segments in the country right now. There is also clear demand for weddings, reunions and other social groups, as well as small niche groups such as associations and clubs. The main theme here is about promoting group travel more effectively in a way that aligns with the purpose of this plan to drive spring, fall and winter visitor spending.

Lastly, there is interest in resuscitating international travel, both group and FIT, which like everywhere else nosedived during the Covid pandemic.



Jamestown S'Klallam Holiday Lights, Blyn

Enhance targeted marketing efforts to increase awareness of spring, fall and winter travel.

ORGANIZATIONAL STRUCTURE

- a. Review Destination Marketing Organization structure, funding and duplication of efforts with other local and regional entities.
- b. Hire personnel in business development and content development.
- c. Upgrade, optimize and consolidate existing websites, social media and tech/data platforms to improve visitor engagement and increase visitor loyalty.
- d. Re-envision and conduct Annual Regional Tourism Summit.
- e. Create a dedicated day or session for building relationships with Tribal leaders and strategic planning for Tribal tourism development.

COMMUNITY/INDUSTRY PARTNERSHIP

- f. Expand marketing partnerships on the Olympic Peninsula, and beyond the peninsula, such as: regional Tribal nations, State of Washington Tourism, Port of Seattle, Visit Seattle, Port of Port Angeles, Port of Port Townsend, Port of Kingston/Edmonds, Federal/State/County Parks and Lands, NOAA, WSDOT, Black Ball Ferry, real estate agencies, neighboring markets including Kitsap Peninsula and Victoria/Vancouver Island.
- g. Develop more community forums for resident input on tourism development, including sharing best practices.
- h. Improve data collection and sharing for resident and public/private partner education.
- i. Create a regular and robust communication plan regarding the value of tourism to local communities and residents.

TARGETED MARKETING

- j. Increase season and holiday-specific content and programming/packaging to engage lifestyle travelers.
- k. Create experience itineraries for targeted interest groups (e.g. Tribal, culinary, arts & culture, shopping, wellness & health, entertainment, family, biking, etc.).
- l. Develop responsible visitor education.
- m. Promote resident staycations during shoulder and winter season.
- n. Develop “bounce back” cross-promotion program to invite peak season visitors to return other times of year.
- o. Create library of podcasts to celebrate amazing local storytellers and area lifestyles (e.g., Tribal stories by Elders and Leaders, beachcombing, environmentalists, boat builders, maritime, etc.).
- p. Collaborate with Black Ball Ferry Line to develop and promote non-summer programs to attract Canadian visitors to explore the Olympic Peninsula in fall/winter/spring.

NEW BUSINESS DEVELOPMENT

- q. Identify new sales and marketing opportunities for niche travel segments and affinity groups.
- r. Identify new sales and marketing opportunities for group travel segments (corporate retreats, state and regional associations, etc.).
- s. Identify new sales and marketing opportunities for the sports tourism segment.
- t. Identify new sales and marketing opportunities for social groups (weddings, reunions, memorial services, etc.).
- u. Identify new sales and marketing opportunities for growing international travel segment.

GOAL #2 DESTINATION & COMMUNITY DEVELOPMENT**Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.**

The success of this tourism master plan to increase spring, fall and winter visitation hinges on developing more interesting things to do and places to go during those seasons. Strategic and executable destination development and community development are interrelated, and they are as critical to the success of this plan as destination marketing.

The majestic Olympic Peninsula stands at the crossroads of opportunity and growth. The region has done well to attract visitors to the national park, but a four-season visitor economy requires more demand generators. The industry must develop more well-rounded visitor experiences that capitalize on lifestyle interests beyond outdoor recreation. That is crucial for engaging and attracting visitors when days get shorter and/or the weather becomes more inclement, as well as increasing repeat visitation.

TOURISM PRODUCT DEVELOPMENT

“Tourism product” is the combination of accommodations, attractions, food and beverage, transportation, tours, entertainment, events and all other goods and services that visitors purchase before, during and after their travel experience. Sometimes travel product is more succinctly defined as: accommodations, attractions, accessibility, amenities and activities.

The Olympic Discovery Trail is a very fortunate and unique asset for the Olympic Peninsula because it is a powerful catalyst for product and experience development. Many other destinations are aggressively trying to develop similar trails that connect a myriad of communities and spur greater economic development for all of them.

In effect, the coastal artery is a community connector that provides a wonderful linear narrative about the past and present to engage visitors in new ways and incentivize visitor dispersal.

The Olympic Discovery Trail is a key differentiator for the north coast of the Olympic Peninsula and the region as a whole. It is highly marketable and it is a dream asset for helping visitors navigate the destination. From a visitor standpoint, the Olympic Discovery Trail is a way for the local travel industry to hold visitors’ hands, so to speak, and guide them on a journey that they can customize for themselves based on their individual travel motivations.

GOAL #2 DESTINATION & COMMUNITY DEVELOPMENT

Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.

With regard to accommodations, many industry and community stakeholders on the Olympic Peninsula emphasized the need to develop more hotels and other types of lodging, or upgrade existing properties. That theme came up often in the focus groups to prepare this plan, with the realization that hotel and lodging development is both a long-term goal and capital intensive.

The intention behind accommodation development is not to meet growing visitation volumes in the summer. It is more about developing new lodging products that act as demand generators across a wider variety of destinations around the Olympic Peninsula. Interesting accommodations that capture the local essence of a destination are often a key purchase trigger for visiting a specific community. Also, both traditional and alternative types of accommodations can be active gathering places that provide a platform for expressing the social and cultural values of the community.

LIFESTYLE EXPERIENCE DEVELOPMENT

Lifestyle experience development is one of the most important themes in this master plan. Industry and community stakeholders continuously emphasized the need to develop more types of visitor experiences, along with complementary packaging and itinerary building to make it easier for visitors to purchase those experiences. Concurrently, there should be greater support for the development of more tour operators and more tours aligned with all the many various visitor lifestyle segments such as culinary, arts/culture, etc.

Related, the "travel as a local" trend continues to grow and evolve. There is increasing demand for "Lifeseeing" travel (versus sightseeing) where visitors can immerse themselves in neighborhoods and feel the local vibe. This is important to consider when developing new self-guided itineraries or guided tour packages across the various visitor lifestyle segments defined on the following pages.



Fort Worden Historical State Park, Port Townsend

GOAL #2 DESTINATION & COMMUNITY DEVELOPMENT

Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.

CULINARY, FOOD/BEVERAGE EXPERIENCE DEVELOPMENT

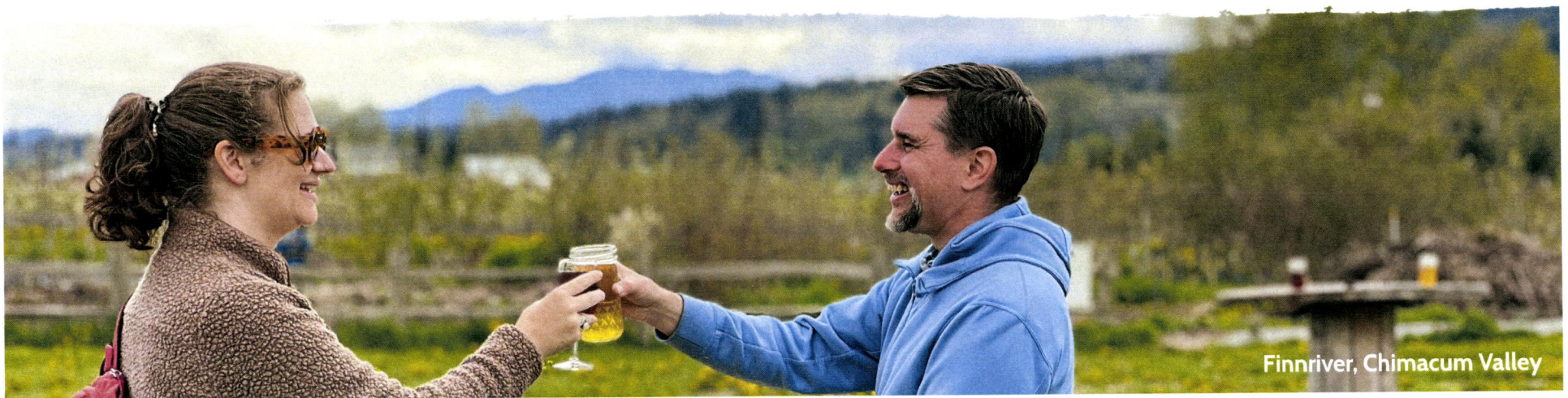
The Culinary Loop has shown there is a wide breadth of small businesses with creative agritourism, food and beverage experiences. Expanding the Olympic Peninsula's reputation as a foodie destination is crucial to attract higher visitor spending year-round. Culinary tourism has proven that it can elevate a destination brand because of the content opportunities and widespread demand across many visitor segments. It's often expressed in the tourism sector that you can never have too much good culinary content and programming.

The Culinary Loop is impressive regarding how it's elevated the culinary sub-sector into the limelight on the Olympic Peninsula, but there has been considerable stakeholder feedback that the present membership model hampers scale. To fully capitalize on all the hard work that has gone into developing the Culinary Loop, there should be an exploration of alternatives to expand on the pay-to-play model.

ARTS, CULTURE & TRIBAL HERITAGE EXPERIENCE DEVELOPMENT

The arts and culture-oriented visitor lifestyle segment encompasses many types of experiences. The focus is on makers — people who create all kinds of things and experiences that tell a story about local identities and values. That can range from art pieces to cultural performances to history tours to cool local shops. Their common theme is the enriching stories they tell that provide a special glimpse into what it means to be a local living on the Olympic Peninsula.

In terms of visitor experiences related to learning about Tribal heritage, the various Tribes have different levels of infrastructure and programming to welcome visitors across the Olympic Peninsula. Tribal leaders have expressed interest in developing the Tribal tourism market, but the process is highly complex and sensitive. It requires a dedicated strategic plan where all strategies are fully customized to the individual Tribe.



GOAL #2 DESTINATION & COMMUNITY DEVELOPMENT

Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.

OUTDOOR RECREATION, HEALTH & WELLBEING EXPERIENCE DEVELOPMENT

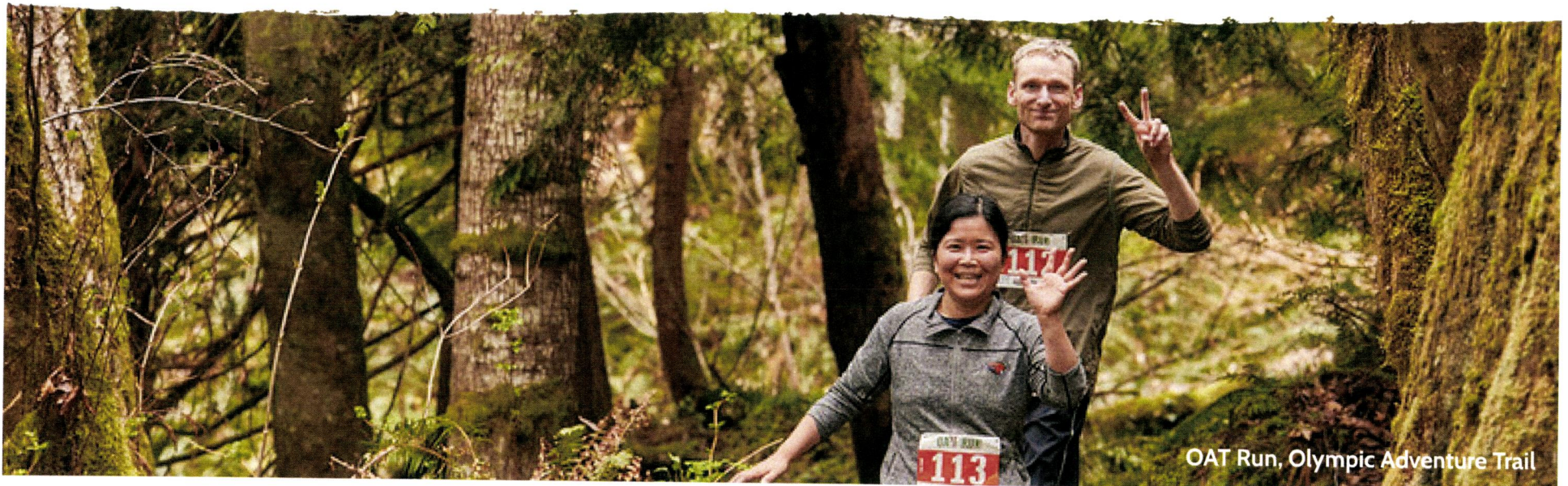
Health and wellbeing tourism experiences in the great outdoors represent one of the fastest growing visitor segments in the world today. More people than ever are eager to explore healthier lifestyles in destinations that provide amazing opportunities for physical, mental and emotional rejuvenation.

The Olympic Peninsula is already a very popular destination for active outdoor recreation in the summer. The strategies in this plan are designed to increase capacity and business development in healthy outdoor tours and activities during spring, fall and winter that cater to people seeking to live a more robust life.

FESTIVAL & EVENT DEVELOPMENT

Events enrich the community tapestry by providing platforms for residents to celebrate the heartbeat of the Olympic Peninsula's cultural and social landscape. Developing new festivals and expanding existing special events are excellent ways to attract visitor spending during need periods. They also help define a destination's identity and brand to enhance its reputation as a vibrant place to visit.

Continuing to develop cross-county partnerships is important to launch new events in spring, fall and winter. Community and industry stakeholders across the peninsula have expressed interest in increasing collaboration with the Washington Festival & Events Association to identify new types of events and co-funding opportunities.



OAT Run, Olympic Adventure Trail

Develop diversified year-round tourism product and visitor experiences to engage a wider variety of consumer lifestyles.

TOURISM PRODUCT DEVELOPMENT

- a. Promote, support and diversify small business development, especially in communities located along the Discovery Trail to capitalize on critical mass of economic activity.
- b. Increase and diversify types of visitor accommodations (e.g., glamping, tiny homes, Airstreams, etc.).
- c. Develop group experiences and venues for corporate, association, sports, social and other group travel segments.

CULINARY, FOOD/BEVERAGE EXPERIENCE DEVELOPMENT

- d. Expand the Culinary Loop and increase support for the culinary supply chain.
- e. Reimagine the integration of experiences (pie-making in PA, breadmaking in Chimacum, cheese making on Marrowstone).
- f. Elevate the peninsula as a leading agritourism region in the Pacific Northwest.
- g. Expand the local wine, cider, brewery and spirits tourism sector.
- h. Develop a farmers market schedule for the OPVB website.

ARTS, CULTURE & TRIBAL HERITAGE EXPERIENCE DEVELOPMENT

- i. Expand collaboration with Tribal communities to develop arts, culture, heritage and culinary experiences (including OPVB staff and partners to request attendance at Tribal leadership meetings.).
- j. Prioritize collaboration with visitor-facing venues such as Makah Museum, 7 Cedars, Quileute Oceanside Resort, Lower Elwha Hotel, etc., which are presently (or will be) active in visitor experience development.

- k. Collaborate with local artists, musicians, performers, craftspeople, etc. to develop authentic storytelling opportunities to educate and inspire visitors.
- l. Establish an official Olympic Peninsula Arts Council or develop a structured network of arts organizations.

OUTDOOR RECREATION, HEALTH & WELLBEING EXPERIENCE DEVELOPMENT

- m. Enhance local bike culture; pursue national cycling certifications; and expand networks related to BMX, pump track, offroad, ebikes, families, tandem, and the Canadian market.
- n. Develop forest bathing experiences and other outdoor wellness experiences.

FESTIVAL & EVENT DEVELOPMENT

- o. Increase shoulder season and winter events, (seasonal) and align event calendars to support arts, culture and lifestyle businesses and organizations.
- p. Partner with Washington Festival & Events Association to nurture new/existing events and create “micro” events in non-peak months, and enhance collaboration regarding event management, funding, etc.
- q. Expand cross-county event partnerships (e.g., Cider/Fungi Festivals on same weekend to encourage longer stays).



GOAL #3 PUBLIC-PRIVATE SECTOR ALIGNMENT

Increase government, community and industry alignment around sustainable tourism development.

The two previous strategic goals have focused on destination marketing and destination/community development. They address both supply and demand. Effectively implementing the actionable initiatives in each will require an unprecedented level of collaboration between the public, private and civic sectors. Aligning government, industry and community priorities drives the performance of any destination across every indicator.

There is already a strong spirit of collaboration on the Olympic Peninsula. Public officials, industry stakeholders and community leaders have all been instrumental in the development of this master plan. The challenge is that various county and municipal organizations can create duplication of efforts. This can result in a fractured approach to leveraging available resources, and it can hamper the development of consistent brand messaging and marketing storytelling in the tourism marketplace.

The Olympic Peninsula is facing some serious macro challenges related to road infrastructure and transportation capacity, workforce housing and development, and slow economic development in various places. These are issues common across the country, and they are beyond the scope of the tourism sector to address alone. However, travel industry leaders need to have a seat at the table for these discussions to provide input, including visitor data, industry trends and general industry business intelligence.

INDUSTRY ADVOCACY

The success of any destination's visitor economy and its ability to grow responsibly is dictated by how well non-industry stakeholders and residents support tourism development. Over 90% of residents on the Olympic Peninsula stated in the 2023 resident sentiment survey that tourism is very important or important. That shouldn't be taken for granted, so it's important to ensure tourism growth aligns with larger community goals over the long term.

It's much more effective when community leaders and industry professionals advocate for the value of tourism with data-based messaging. For example, residents should know the degree to which visitor dollars make many small businesses viable. Employment data and tax contributions that pay for public services and amenities are also valuable to share. Ultimately, there should be an advocacy strategy that informs how the public and private sector align their messaging to residents about the social and economic benefits of tourism.

GOAL #3 PUBLIC-PRIVATE SECTOR ALIGNMENT

Increase government, community and industry alignment around sustainable tourism development.

FIRST IMPRESSIONS

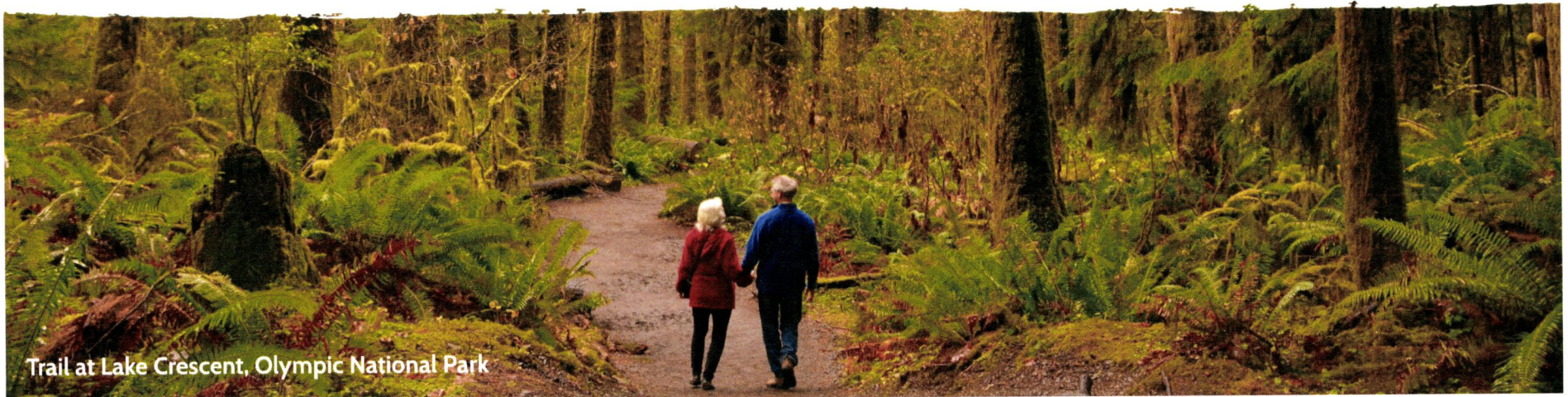
One immediate action item coming out of this plan is about investing in welcome signage at the major points of entry onto the Olympic Peninsula. The importance of a strong sense of arrival cannot be overstated, in terms of how that sets the tone for an entire trip. Signage also imprints a visual identity into the minds of visitors; it shows how the destination appreciates visitors; it communicates a warmth of hospitality; and it helps guide visitors on their journey.

More long-term, the downtown urban environments in the municipalities can use some love. Residents from Port Angeles, for example, were adamant during their town hall that improvements need to be made to increase local pride and improve optics related to safety. Aesthetics, walkability, security and experience quality — those are the cornerstones of effective placemaking. They also improve how visitors feel when they're first greeted by their hosts.

SMALL BUSINESS DEVELOPMENT

Government and industry leaders agree they can work together more deliberately in a few areas to accelerate tourism and economic development. One specific initiative is to update zoning so established businesses can expand their offerings to deliver a more dynamic visitor experience year-round. Certain zoning laws have been on the books for decades that challenge that, but government officials have stated they are eager to address encumbrances to business development and economic growth.

Small business owners are asking for more streamlined business development support related to permitting, grants and general business intelligence. The tourism industry and local chambers of commerce have a good working relationship, and there is a strong will to collaborate further to support small business development specifically related to the visitor economy.



Trail at Lake Crescent, Olympic National Park

GOAL #3 PUBLIC-PRIVATE SECTOR ALIGNMENT

Increase government, community and industry alignment around sustainable tourism development.

INFRASTRUCTURE DEVELOPMENT

The national shortage of workforce housing and travel industry workforce are interrelated. They represent two sides of the same coin, and together they are arguably the biggest challenges that hundreds of destinations in North America face. The key to moving the needle on these issues is communities coming together to develop more unified housing action plans.

Likewise, transportation infrastructure (including roads and highways, and land/sea transportation options) are also among the most

concerning challenges facing long-term tourism and economic growth for the Olympic Peninsula.

This is key: If visitors feel it's too stressful or too much of a hassle to get to the peninsula, with more stress added to navigate within it, then it's difficult to promote the destination as a great place to relax and unwind.

Transportation infrastructure requires a collaborative regional and state approach more than any other strategic imperative in this plan.



Ludlow Falls, Port Ludlow

Increase government, community and industry alignment around sustainable tourism development.

INDUSTRY ADVOCACY

- a. Develop messaging to increase resident understanding that visitor dollars are why they have great restaurants, amenities and outdoor experiences (e.g., “This [] brought to you through lodging tax dollars provided by visitors”).
- b. Convene public, private and civic sector leaders to agree on uniform advocacy language and opportunities/challenges related to resident sentiment.

FIRST IMPRESSIONS

- c. Review entrance signage to welcome visitors to the Olympic Peninsula (e.g., monuments at Hood Canal, coming from Victoria and through Western and Southern points of entry).
- d. Create uniform Olympic Peninsula branding at all visitor information centers and consider renaming them as Olympic Peninsula Welcome Centers (or co-branding them, Olympic Peninsula Welcome Center — Forks, etc.).
- e. Invest in downtown beautification, placemaking, walkability and security (especially Port Angeles as a major gateway to the Olympic Peninsula) in alignment with the Elevate PA Strategic Action Plan.

SMALL BUSINESS DEVELOPMENT

- f. Update zoning to support travel industry business development (e.g., Agritourism businesses, cideries, lavender farms, breweries and distilleries.) This is a current Clallam County focus/need.
- g. Create a more streamlined process and enabling environment for investment in small business development in outdoor recreation and lifestyle experiences (e.g., tour operators, restaurants, retail, indoor facilities, etc.).

INFRASTRUCTURE DEVELOPMENT

- h. Align counties and cities around strategies for housing and workforce development. Ensure tourism-related workforce housing is included in every municipality's housing action plan.
- i. Bring all industry and community stakeholders together to advocate for improved ferry equipment, infrastructure and services.
- j. Address quality of visitor experience/quality of life for residents during high season, especially related to traffic; source state funding for high-capital infrastructure needs.
- k. Create communication platforms to broadcast business interruptions that could impact high-season successes (road/bridge closures, natural disasters, etc.).
- l. Develop a sustainable tourism benchmarking framework and identify funding sources to ensure consistent tracking processes over the long-term.
- m. Explore options for improvements in broadband connectivity.

Top 5 SHORT-TERM PRIORITIES

With so many opportunities, strategies and action items in this tourism master plan, it helps to have a final list of takeaways that sum up the major short-term deliverables to provide direction and build momentum. The following are geared to help identify shared goals and inform investment decisions as community and industry stakeholders begin to embark on implementing this plan.

1

PROMOTE WHY THE DIFFERENCE IS WORTH THE DISTANCE

Develop new maps, messaging and marketing to shift the (mis) perception that the Olympic Peninsula isn't easily accessible. Lean into the language that the Olympic Peninsula is only a two-hour drive from Seattle-Tacoma International Airport. That two-hour timeframe will be powerful in consumer-facing messaging. Also, emphasize how the journey can be part of the experience, and a short drive or ferry ride is necessary to access such a distinctive and special place.

2

PROMOTE HOW THE OLYMPIC PENINSULA IS MUCH MORE THAN A PARK

The Olympic National Park is one of America's most awe-inspiring natural environments. It is only part the story. There should be significant investment in promoting lifestyle experiences beyond outdoor recreation that celebrate the Olympic Peninsula's complete spectrum of community personalities and vibes. The goal is to engage high-value travelers during more times of the year, and ultimately, drive more repeat visitation to increase overall customer lifetime value.

3

PROMOTE STAYCATIONS TO INCREASE SPRING, FALL & WINTER BUSINESS

Olympic Peninsula residents should really get to know their own backyard. Many residents said exactly that during the development of this plan. Residents are the most likely travelers to want to visit outside summer peak season, and they tend to be the most responsible travelers, as well. The key to increasing staycations is to develop more resident incentive/reward programs and promotional campaigns to motivate more locals to travel local.

4

MAKE VISITORS FEEL MORE WELCOME

There should be a stronger sense of arrival when visitors drive onto the Olympic Peninsula and when they arrive at each of the major destinations. Every major point of entry should make visitors feel welcome. They should have clear orientation so they know they've arrived somewhere special. A welcome sign is a trigger. It makes people feel like they've arrived. It makes them start to feel different. It's the beginning of the experience. Welcome signage and visitor information show that visitors are valued, and that the community is proud of where they live and they want to share it.

5

IMPROVE MOBILITY OPTIONS TO HELP VISITORS SUPPORT SMALL BUSINESSES

When a destination makes it easier for visitors to explore everything in the region, it's helping remove friction between people spending their visitor dollars and increasing local business revenue. Mobility equals opportunity. Make it more convenient to help visitors spend their money. Many industry and community representatives across the Olympic Peninsula alike have advocated for investing in public and private shuttle services and other modes of transportation. This benefits everyone: residents, business owners and visitors.

Top 5 LONG-TERM IMPACTS

With so many opportunities, strategies and action items in this tourism master plan, it helps to have a final list of takeaways that sum up the major short-term deliverables to provide direction and build momentum. The following are geared to help identify shared goals and inform investment decisions as community and industry stakeholders begin to embark on implementing this plan.

1

ROBUST FOUR-SEASON VISITOR ECONOMY

The most important outcome from this plan in five years is for small business owners to have more consistent revenue and cash flow year-round, more full-time employees, and more peace of mind. That benefits the vast majority of all residents living and working on the Olympic Peninsula. It can't be overstated, however, that accomplishing this will require the sustained efforts of many different community and industry leaders to build coalitions of support and drive action.

2

GLOBAL BRAND RECOGNITION

There will come a time when much more of the world knows about the Olympic Peninsula's distinctive beauty and character. This tourism master plan aims to accelerate that. Presently, even a lot of people living along the I-5 corridor don't appreciate the full scope of lifestyle experiences on the peninsula. There are so many powerful stories to share beyond the natural beauty and peaceful vibe that can help expand the Olympic Peninsula brand exponentially.

3

ECONOMIC OPPORTUNITY FOR ALL

As tourism grows into a more consistent year-round economic sector, it provides more personal and professional development opportunities for people of all ages and backgrounds. The travel and tourism industry is an exceptional industry for people of all educational levels and backgrounds. This is critically important for young residents especially so they see viable long-term career goals on the peninsula instead of looking elsewhere to relocate.

4

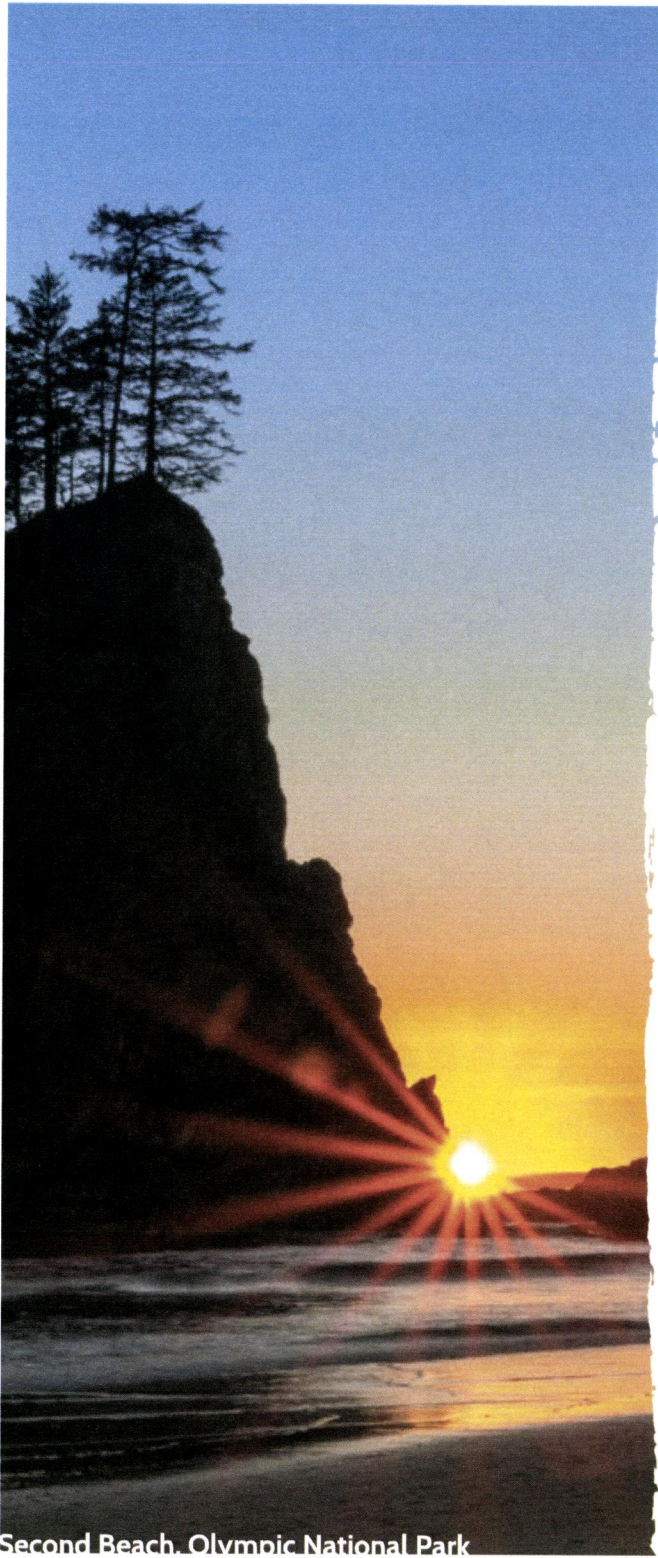
TRIBAL TOURISM COLLABORATION

Several Tribal communities on the Olympic Peninsula have expressed interest in expanding their participation in tourism development. Tribal leaders feel their community members have many important stories to share with visitors, and they wish to bring Tribal and non-Tribal residents together to help develop appropriate visitor experiences that respect traditional values. The Olympic Peninsula's visitor industry has a significant opportunity to lead Tribal tourism development in the U.S.

5

RELIABLE PUBLIC/PRIVATE TRANSPORTATION

A more consistent year-round visitor economy provides many benefits. One is that it will spur greater investments in more reliable public and private transportation options across the peninsula. This is crucial for sustained economic growth in both the major municipalities and smaller communities. Better mobility in-destination was also one of the most consistent demands from residents.



Summary IMPLEMENTATION STRATEGY

A plan is only as good as the execution behind it.

The launch of the Olympic Peninsula Tourism Master Plan is just a road map. It is a guidance document that captures and prioritizes what so many residents, business owners, and other community and industry stakeholders say they want to see happen over the next five years.

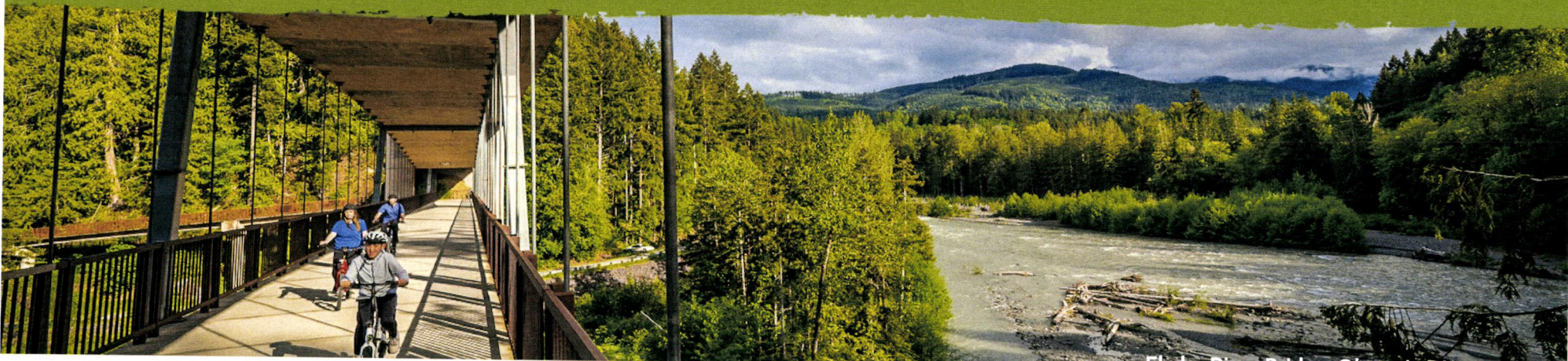
The process to execute the actionable initiatives in this plan is a decidedly complex set of tasks that will require a high degree of public and private sector collaboration over the long term to accomplish shared success.

Toward that end, there is a separate Implementation Plan with a flow chart that includes the three primary strategic goals and all their respective initiatives. It is designed in an Excel spreadsheet so that it can be updated on a regular basis to track ongoing developments and accomplishments.

The Implementation Plan will include short, medium and long-term time frames for each initiative. It will provide intended outcomes and relevant key performance indicators. And, it will identify the leaders and coalition of partners who will oversee the execution of the initiatives and be held accountable for their performance.

The Implementation Plan helps ensure that the Olympic Peninsula Tourism Master Plan is a living and transparent document that remains relevant on a day-to-day basis. It also keeps the strategic framework agile so it can evolve with ongoing developments on the Olympic Peninsula and within the travel and tourism marketplace.

Appendix CASE STUDIES



Elwha River Bridge - Olympic Discovery Trail

Travel Industry CASE STUDIES

The following case studies provide inspiration and direction to help achieve the actionable initiatives in the Olympic Peninsula Tourism Master Plan.

VANCOUVER ISLAND / vancouverisland.travel

Destination Greater Victoria and multiple other tourism organizations in the region pooled resources and collaborated to develop the Pacific Marine Circle Route. The coastal loop promotes year-round travel around the island, and it shows off the full spectrum of lifestyle experiences for type of traveler. The dynamic content and sophisticated online maps help visitors develop comprehensive itineraries based on their personal travel motivations, and it increases visitor loyalty by enticing visitors to return to explore other parts of the road network.

NORTH CAROLINA / neckofthewoodsnc.com

The Appalachian Regional Commission, Boone/Watauga County Tourism, and Blowing Rock Tourism collaborated to develop the Neck of the Woods Local Flavor Trail. Well-designed for mobile use, the culinary trail engages various types of food lovers, and it disperses visitor spending to more small businesses in more diverse areas. It has earned national recognition for how the culinary tool has supported small business development in many different communities.

JACKSON HOLE, WY / visitjacksonhole.com

Adding a new narrative beyond outdoor recreation, Visit Jackson Hole launched a "Wild Women" campaign to showcase innovative and successful female leaders in the public and private sectors. The initiative highlighted the community's values as a dynamic place where all people have opportunities to contribute to the local social fabric and overall business success. The initiative has also been successful at expanding the destination's brand and identity for both visitors and residents.

VISIT CARSON VALLEY, NV / visitcarsonvalley.org

Located near Lake Tahoe, the small communities that make up Carson Valley are eager to communicate and collaborate to define the future of tourism in their region. The Visit Carson Valley organization developed a "Tourism Matters" website to provide information relating to visitor data, strategic planning initiatives, industry testimonials and community feedback. The site provides valuable insights to help educate everyone living in the Valley about the #1 economic driver in the destination.

FLORIDA KEYS, FL / keysarts.com

The Florida Keys Council of the Arts is the leading arts and culture organization in the Florida Keys. As the non-profit local arts agency in Monroe County, it connects audiences from around the world to local artists, galleries, theaters, museums, festivals, dance and music from Key Largo to Key West.

METIS CROSSING, ALBERTA / metiscrossing.com

This Tribal-owned lodge is attracting international attention for the innovative combination of accommodations, cuisine, outdoor recreation, and a wide variety of storytelling experiences shared by Metis people about their land, culture and history. The success of Metis Crossing is due to an incredible degree of collaboration between many different organizations, who were intent on establishing a new blueprint for Tribal tourism development.

MOAB, UT / discovermoab.com

Discover Moab helped develop and promote a trail network and online guide for e-bike riders to capitalize on the growth and opportunities in e-mobility. The organization collaborated with Grand County, the City of Moab, and Moab Trail Mix to complete the project.

KAMLOOPS, BC / kamloopssportsCouncil.com

Kamloops, British Columbia has been successful at increasing the volume of amateur sports events it hosts every year. The Kamloops Sports Council developed a strategic event management plan that helps get everyone on the same page about sports tourism. The plan is a good case study for developing initiatives that prioritize community needs and benefits, ensure sustainable funding for covering the public costs of those events, and organize the many volunteers necessary to host high-quality event experiences.

ITI DIGITAL EVENTS CALENDAR / iti-digital.com

Tourism organizations are using the ITI Digital daily events calendar to help manage, input and expand the number of events on a tourism organization's event page. The technology is winning positive reviews with its ability to integrate promotions and packages into the platform to increase visitor engagement, industry partner support and overall return on investment.

Olympic

PENINSULA



Lavender Farm, Sequim



The Whale Trail



Hoh Rain Forest, Olympic National Park