



2022 SEMI- ANNUAL REPORT

DESTINATION MARKETING &
MANAGEMENT, JANUARY-JUNE

"Take only memories, leave only footprints." -Chief Seattle

Photo: 50 Shades of Blue by Teren Photography

DESTINATION MARKETING & MANAGEMENT



OUR MISSION

"To enhance the economic prosperity of San Juan County by promoting the San Juan Islands as a preferred, year-round travel destination, while respecting and sustaining the Islands' unique and diverse ecosystems, environments, lifestyles and cultures."



Tourism, when managed responsibly, is a key economic development strategy for small, rural towns and counties, as well as big cities and countries. Tourism is a top economic driver for San Juan County. Research by Tourism Economics reveals that visitors spent over \$267 million in our county in 2021.

Visitors "import" new dollars, which benefit small businesses and residents as these dollars circulate throughout our island communities. Tourism creates business opportunities and jobs, offsets Islanders' tax burdens when visitors pay local sales tax, and "subsidizes" a variety of restaurants, retailers and other businesses.

Tourism also helps support and sustain many community assets which residents often take for granted such as parks, farmers markets, museums, community theatres, artist co-ops, wineries, festivals and events, and so much more.



ABOUT US

The San Juan Islands Visitors Bureau (SJIVB) is a non-profit, 501(c)6 economic development agency created and incorporated in 1999 which has served as San Juan County's and the Town of Friday Harbor's contracted, locally staffed destination marketing organization since 2003.

Over the last 19 years, we've evolved into a destination marketing and *management* organization (DMMO) as we continue to focus on responsible, stewardship-minded tourism via branding and messaging, striving to help balance the quality of our economy with the quality of residents' lives, the environment, and our visitors' experiences.



GOALS

1. To help strengthen San Juan County's year-round economy.
2. To foster an appreciation of San Juan County's maritime and rural ways of life, as well as its history, arts and culture.
3. To communicate San Juan County's environmental stewardship messages to visitors.
4. To enhance visitors' travel experiences countywide.

WHAT WE DO

1. ECONOMIC DEVELOPMENT VIA DESTINATION MARKETING

- Focus on shoulder season visitation to the Islands
- Work with media to tell authentic Island stories
- Use targeted marketing to attract mindful visitors

2. DESTINATION MANAGEMENT VIA MESSAGING, STEWARDSHIP EDUCATION & VISITOR SERVICES

- Communicate with potential visitors via phone, email and our website; mail travel brochure for trip planning
- Integrate stewardship, "Love It Like a Local" and "Leave No Trace" principles into messaging on our website, social media, brochure, advertising, media relations, etc.
- Address local policies that impact tourism and resident quality of life; participate in SJIs Stewardship Network

3. MEMBER MARKETING, SUPPORT & ADVOCACY

- Marketing support for 220+ local businesses and non-profits
- Connect members with potential visitors and resources including media leads, marketing tips, green business information, and more

WHY ARE DMMOS IMPORTANT?

Destination marketing *and* management are essential to our Islands' successful tourism economy. Tourism is big business for most towns, cities, counties, states, and countries around the world. *All compete for visitors and their hard-earned dollars.*

As the local DMMO, our partnerships with businesses, non-profits, parks and public land managers, and others allow us to carefully craft messaging and stories that best represent and educate potential visitors about our unique Islands.

One magazine article, online or print ad, social media post, or wedding show display can result in couples visiting for relaxing or romantic weekends, families staying for an entire week, or a wedding party inviting their guests to spend a couple of nights and thousands of dollars locally.

WE FOCUS ON 4 PILLARS OF DESTINATION MARKETING & MANAGEMENT

Our quality of life and tourism economy depend on our beautiful environment. Our four pillars focus on working to strike a balance between sustaining a vibrant economy, protecting resident quality of life, preserving our fragile lands and waters, and creating memorable visitor education and experiences. We believe focusing on these four pillars is key to helping the Islands move forward responsibly into the future in regards to tourism.

ECONOMY

Brand and market our destination & tourism experiences to enhance our economy in ways that balance its vibrancy and long-term sustainability

VISITOR EDUCATION & EXPERIENCE

Promote Island experiences while educating visitors about Islanders' stewardship and sustainability values



ENVIRONMENT

Educate visitors about the Islands' sustainable and regenerative tourism principles, positioning the Islands as a leader in destination stewardship

RESIDENT QUALITY OF LIFE

Strive to protect residents' quality of life by helping to mitigate the impacts of tourism by focusing on promoting shoulder seasons, via messaging on our website, etc.

HELPING TO MANAGE RESPONSIBLE, SUSTAINABLE TOURISM VIA MESSAGING

As a Destination Marketing & Management Organization, we help manage responsible, sustainable tourism *before* visitors arrive via stewardship messaging on our website, travel brochure, advertising, social media, communications with writers and editors, etc.

In 2019 we applied for the lodging tax grant which enabled the County to hire consultants to begin the Sustainable Tourism Management Plan public process this spring. The County's Environmental Stewardship Department is spearheading this project, and our Executive Director, and a Board member, sit on the Steering Committee. We look forward to taking actions which will help support this important plan in years to come.

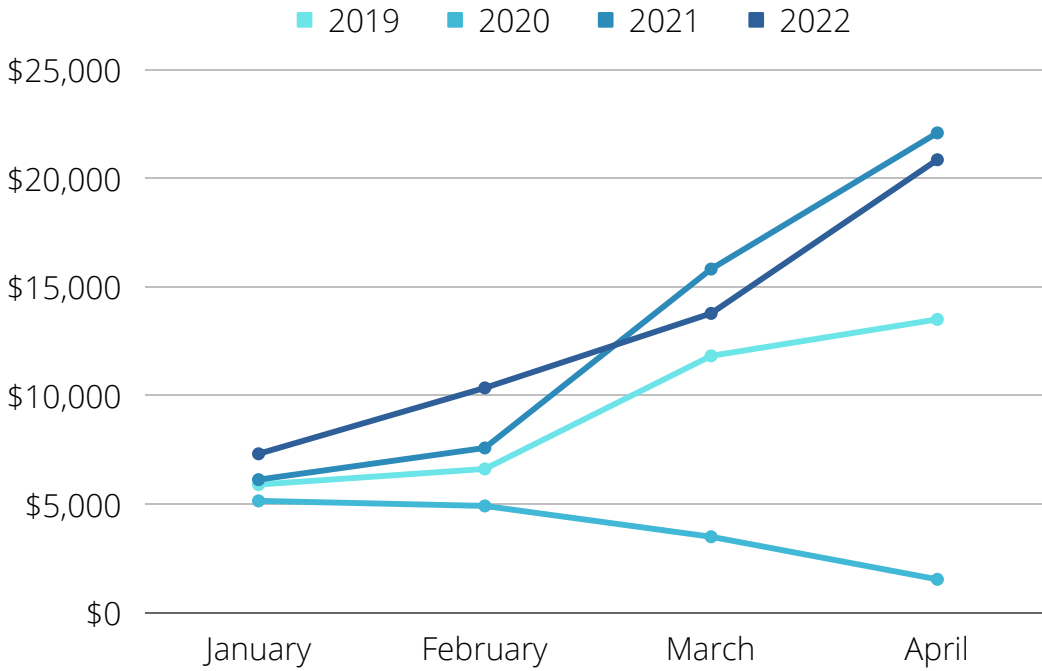




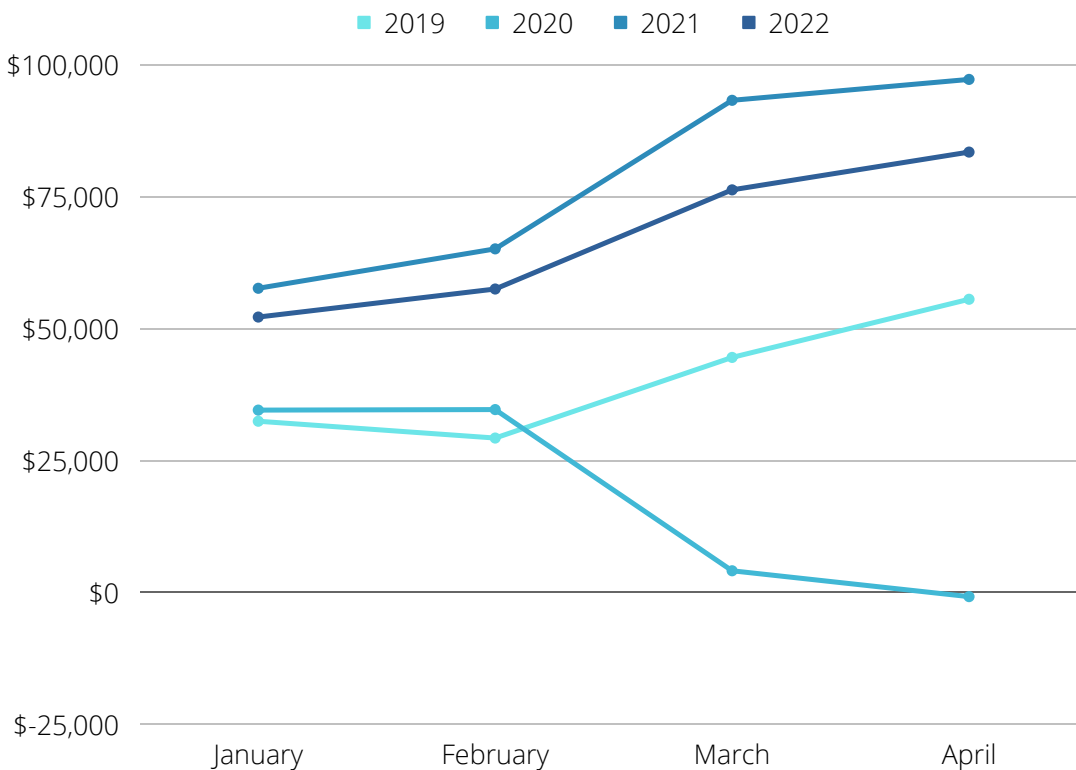
BENEFITS OF TOURISM & LODGING TAX COLLECTIONS

Tourism is a top economic driver for San Juan County. The lodging tax statistics on the left are from the Town of Friday Harbor and San Juan County, comparing January-April collections in 2019-2022. On the right is 2021 data specific to San Juan County from Tourism Economics, a research company contracted by State of Washington Tourism.

JANUARY-APRIL FRIDAY HARBOR LODGING 2% TAX DOLLARS



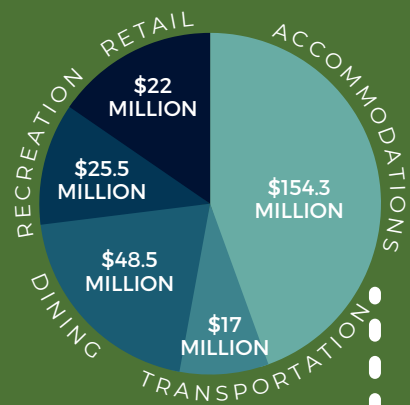
JANUARY-APRIL SAN JUAN COUNTY LODGING 2% TAX DOLLARS



BENEFITS FROM TOURISM



Visitors spent **\$267.3 MILLION** in San Juan County in 2021



1,489 JOBS

were directly supported by tourism in San Juan County



SJC tourism created

\$66.2 MILLION

in job & business owner earnings



Tax revenue collected from SJC visitors totaled

\$22.3 MILLION

in state & local taxes



State & local tax revenues generated by visitors supported

\$2,641

in governmental services for each local household



ECONOMY PILLAR

Our marketing efforts — which help support and enhance the Islands' tourism economy, and as a result the County's overall economy — are split between "paid" advertising, "earned" media coverage, and "owned" social content. Funding from the County and Town of Friday Harbor lodging tax supports advertising campaigns which target our main feeder market — the greater Seattle area. Mentions of the Islands seen in articles or lists in various media outlets are the result of our media relations efforts or curious journalists — they are not paid ads.

SEASONAL ADVERTISING CAMPAIGNS IN SEATTLE AREA

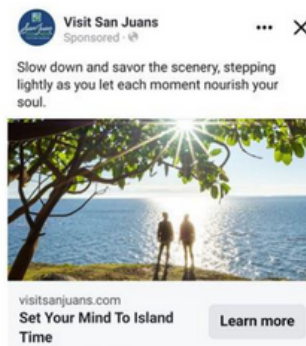
"PAID"

SEASONAL CAMPAIGNS TO DATE:

- Winter Romance: January - Mid February
- Spring & Spring Break: Mid March - May
- Early Summer: June
- Annual: WA State & Seattle Guides/Websites

4,160,591

Online advertising impressions in the Seattle market from January-May



MEDIA RELATIONS

"EARNED"

Our media relations focus is to emphasize our unique islands and local sustainability initiatives to inspire eco-minded visitors. Though we can't work with every person who decides to write about the Islands, we strive to target, support, and educate journalists who want to tell meaningful, stewardship-minded stories about the Islands.

Note: We don't pay for coverage, nor can we control what a given outlet may print about the Islands.

7 MILLION

MEDIA ADVERTISING
EQUIVALENCY VALUE

13

ASSISTED PRESS
TRIPS

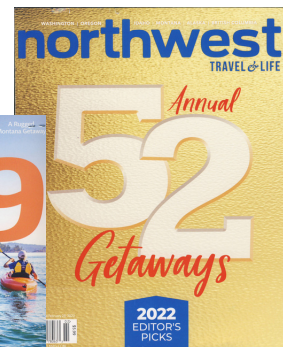
228 MILLION REACH

VIA CISION + PRINT & ONLINE
TRACKED TRAVEL ARTICLES

166

MENTIONS IN PRINT &
ONLINE ARTICLES

Among the press trips we've helped host so far this year, three writers were on assignment for *The Washington Post*, *USA Today*, and *Travel+Leisure*, respectively. These articles have not yet been published.



NOTABLE MEDIA FEATURING THE ISLANDS:

Forbes, Seattle Met magazine, LonelyPlanet.com, National Geographic, The Seattle Times, Newsweek.com, Sunset.com, CondeNastTraveler.com, Huff Post



ENVIRONMENT PILLAR

The Islands' trails, forests, fields, waterways, and heritage sites are valuable and treasured by both residents and visitors. Our Stewardship & Communications Manager makes sure we view our work through an environmental lens to help ensure that the Islands' natural beauty and cultural heritage remain protected and intact for generations to come.

EXAMPLES OF DESTINATION MANAGEMENT MESSAGING ON OUR WEBSITE'S HOME PAGE & STEWARDSHIP PAGES



How to Love It Like a Local

Loving the Islands like a local can mean many things — bringing a reusable water bottle, joining a work party or other volunteer event, driving carefully on narrow island roads, and everything in between. The beauty of the Islands is meant to be shared and locals urge you to learn the history of this special place so we can work together to ensure it endures. Here are a few ways to help preserve the qualities that make this place special, and enjoy a better visit in the process.



Plan Ahead

Book ferries and accommodations early, and consider visiting in the shoulder seasons or during the week for the best island experience.



Conserve Water

On an island, water is everywhere. But fresh water is always at a premium. With lower rainfall from May to October, our water supply is not recharged during the summer. Conserve when you can, keep showers short, and shut off the tap instead of letting it run.



Tread Lightly

Stay on established trails, campsites, and parking spots. Erosion happens quickly. It's not only unattractive, it can affect the local ecosystem.

How to Love Wildlife Like a Local

Our wildlife is precious to us and we want to keep them wild. We know that this is their home, too, and we must work to protect their way of life. This is why we don't feed the foxes and maintain a safe distance while watching them. When on the water, we know to give marine life plenty of space to forage, play, and communicate with each other by **being "whale wise."**



BY THE NUMBERS

2,800 VISITS

TO OUR
"LOVE IT LIKE A
LOCAL" RESPONSIBLE
TRAVEL HUB

787 VISITS

TO OUR
"SAN JUAN ISLANDS
PLEDGE" PAGE

193 SIGNATURES

ON OUR
SAN JUAN ISLANDS
PLEDGE

250 VISITS

TO OUR "ISLAND
KIDS EXPLAIN"
VIDEOS WEB PAGE

1,140 VISITS

TO OUR
VOLUNTEER VACATION
OPPORTUNITIES PAGE



RESIDENT QUALITY OF LIFE PILLAR

We live, work, and play in a beautiful and quiet part of the world, so it's a natural response to feel anxious when we start to see an increase in cars and bicyclists on the roads, an influx of short term renters occupying our neighborhoods, and other signs of tourism — especially during summer.

Below are examples of ways we're working to help mitigate the negative effects of tourism to ensure that our quality of life in the Islands is sustained, in addition to being very involved in the County's Sustainable Tourism Management Plan public process which began this spring.

Community Involvement

Tourism impacts many Island organizations' missions, and as a result, various staff are members of different organizations and committees including:

- Sustainable Tourism Management Plan Steering Committee (Deborah)
- Stewardship Network of the San Juans (Amy is Chair)
- San Juan Island Chamber of Commerce Board (Deborah)
- San Juan County Ferry Advisory Committee (Deborah)
- Friends of Lime Kiln Society Volunteer (Amy)
- San Juan Community Theatre Volunteer (Annesa)
- Community Thanksgiving Dinner Volunteer (Annesa)
- SJI School District Career & Technical Education Advisory Committee (Deborah)

Community Relations

- Our Stewardship & Communications Manager attends public meetings about topics that affect the community and tourism to learn more about how we can help mitigate negative effects of tourism.

Participating in the Conversation

- Held "Tourism Talk" meetings on each island for residents, businesses & non-profits in February & March to listen to tourism concerns
- Listened to all seven of the Sustainable Tourism Management Plan public meetings in April & May
- Worked with the Terrestrial Managers on educational practices around the treatment and protection of San Juan Island foxes

Supporting our Community

- Donated \$1,000 from our Membership funds to the Friday Harbor Fire Fund
- For the fifth year, we offered \$3,000 in scholarships, from our Membership funds, to seniors at each of the three Islands' public high schools pursuing degrees in hospitality, business/communications or related fields of study.
- Staff adopted Jackson Beach through Plastic Free Salish Sea
- Continued to assist the County's Environmental Stewardship Dept. in distributing Stewardship Guides to lodgings, VRBOs and Airbnbs.

THE SAN JUAN ISLANDS PLEDGE 193 SIGNATURES TO DATE ON OUR WEBSITE

*I will come prepared for any experience.
I will bring what I need, and won't leave anything behind.
I will be courteous to all on the road,
no matter the number of wheels.
I will feed my sense of adventure, but never the wildlife.
I will wander in the middle of the beach,
not in the middle of the street.
I will venture into unfamiliar places
while staying on familiar trails.
I will carve the waves and not the trees.
I will camp for the night in a designated site.
I will help out with the drought and turn off the spout.
I will keep my distance from the seals and whales
using a motor, paddle, or sails.
I will keep my fire in a ring
and store-bought firewood I will bring.
I will leash my dog on the street and on the trail,
and dispose of waste in the proper place.
I will use a lens to zoom and give wildlife plenty of room.
I will acknowledge all cultures and respect their sites.*





VISITOR EDUCATION & EXPERIENCE PILLAR

Our messaging seeks to educate potential visitors about the Islands and how to both plan a memorable trip *and* be mindful travelers. While promoting the amenities of our members, we also share guidelines on how to travel in eco-friendly and responsible ways — for example, bring a reusable water bottle and leave the plastic behind. We also strive to make all potential visitors feel welcome via our IDEA initiatives. (*Visitation/DMA data is attributed to Datafy.*)

TRIP PLANNING, INSPIRATION & EDUCATION JANUARY - JUNE



577,953
WEB SESSIONS
+4% YOY



24,950
E-NEWSLETTER
SUBSCRIBERS
+30.6% YOY

SOCIAL MEDIA ("OWNED")



23,100
FOLLOWERS
+5.3% YOY



10,975
FOLLOWERS
+15.6% YOY



5,147
FOLLOWERS
+0.1% YOY

ENGAGING WITH POTENTIAL VISITORS



436
PHONE
CALLS



523
EMAILS



3,922
BROCHURES
MAILED

Brand Positioning Statement:

The SJIVB promotes responsible travel by inspiring people to mindfully experience, cherish and protect the magical, natural beauty and quality of life in the Islands.



WHERE WERE OUR JANUARY-JUNE VISITORS FROM?

Top DMAs (Designated Market Areas), according to Datafy

1. SEATTLE-TACOMA: 58,000+
2. PORTLAND: 8,900+
3. SPOKANE: 3,900+
4. LOS ANGELES: 2,600+
5. DENVER: 1,800+
6. SAN FRANCISCO: 1,800+



DMAs, also referred to as media markets, are the 210 regions of the U.S. divided by Nielson to measure and define television and radio markets



"IDEA" INITIATIVES

INCLUSION, DIVERSITY, EQUITY, ACCESS

Even amid a global pandemic, 2020-2022 brought issues of racial inequality to the surface, revealing weaknesses and opportunities in the travel industry, among other industries.

We acknowledge that there is much more work we need to do, and we're striving to learn from and connect with people of diverse backgrounds to make the Islands more inclusive and welcoming.



MEDIA RELATIONS

- Received a Port of Seattle grant to partner with the Black Travel Alliance for a fall FAM ("familiarization") tour with BIPOC writers/influencers
- Connected with staff from Outdoor Afro during the Outdoor Writers Association of America conference
- Renewed destination listing in Pride Journeys Travel Directory
- Became a bronze member of the Travel Unity Alliance to gain access to resources and network with other professionals



WEBSITE

- Hosted a Washington-based writer to create website content about experiencing the Islands as a family with special needs
- Featured LGBTQ+ couple in new "first time visitors" video



MEMBER MARKETING, SUPPORT & ADVOCACY

Being a partner to small businesses and non-profits means being proactive, supportive, and invested in the community. We strive to be an advocate for Island tourism industry businesses and non-profits by providing an expansive platform to promote their services via our website, etc., as well as working to identify ways in which we all can collaborate to develop a sustainable economy, best represent our destination, and inspire mindful visitors.

ONLINE GIFT GUIDE

During COVID, it was important for us to continue supporting our member businesses and non-profits — even though we couldn't promote travel in the same way.

We created an online gift guide to sell products, gift certificates, and services, *which has become an important, permanent part of our website and membership services.*

The online gift guide currently features 87 members.

6,513
GIFT GUIDE
PAGEVIEWS

3,683
CLICK THROUGHS TO
MEMBER PRODUCTS

Explore the Gift Guide at:
VisitSanJuans.com/gift-guide



San Juan Islands Marketplace

Treat yourself or give the gift of the Islands without leaving the comfort of your cozy home! Below you'll find a variety of offerings and gift certificates from our talented artists, makers and small businesses.

Island Products & Apparel

For the Food & Beverage Enthusiast



Brown Bear Baking Gift Friday Harbor Chocolates Girl Meets Dirt Heritage Harrison House Gourmet Foods Pelindaba Lavender

For the Art & History Aficionado



Alchemy Art Center Classes Arctic Raven Gallery Colleen Johansen Fine Art Debbie Pigman Artworks Friday Harbor Atelier


San Juan Island San Juan Island San Juan Island San Juan Island San Juan Island

MEMBERSHIP: BUSINESSES & NON-PROFITS


 **223**
MEMBERS

 **15**
NEW MEMBERS

 **27**
MEMBER NEWSLETTERS
& ACTION ITEMS

 **257,888**
MEMBER WEB
LISTING PAGEVIEWS

 **179,187**
MEMBER WEB LISTING CLICK
THROUGHS TO THEIR WEBSITES

 **20,979**
MEMBER WEB ADVERTISER CLICK
THROUGHS TO THEIR WEBSITES
(27 MEMBERS HAVE WEB ADS)

SAN JUAN ISLANDS



SCENIC BYWAY

After a 10-year hiatus, National Scenic Byway grants became available again this spring. We partnered with San Juan County Public Works, the Orcas Island Chamber of Commerce, and the Orcas Island Rotary Club to submit a grant application for a bicyclists' rest area at Map Corner on Orcas Island. We'll find out in the fall whether or not we're awarded this grant.

2022 LEADERSHIP

BOARD OF DIRECTORS

ANNA MARIA DE FREITAS

President
Harrison/Tucker House/Coho, San Juan Is.

LYDIA MILLER

Vice President
Pebble Cove Farm, Orcas Island

ANTHONY ROVENTE

Treasurer/Secretary
The Edenwild Boutique Inn, Lopez Is.

LAURA SACCIO

Earthbox Inn & Spa/Bird Rock Hotel
San Juan Island

BILL APPEL

SJC Economic Development
Council Rep

JEFF FRIEDMAN

Outdoor Recreation/Watchable
Wildlife/PWWA Rep/Maya's Legacy
San Juan Island

KENDRA SMITH

Terrestrial Managers Rep/SJC
Environmental Stewardship Dept.

AMANDA ZIMLICH

Otter's Pond B&B, Orcas Island

BECKI DAY

San Juan Island Chamber Director

LANCE EVANS

Orcas Island Chamber Director

ANDREA HUSS

Lopez Island Chamber Director

STAFF

DEBORAH HOSKINSON

Executive & Marketing Director

AMY NESLER

Stewardship &
Communications Manager

ANNESA KNOWLES

Visitor & Member Services Manager

ANNA ERICKSON

Digital Marketing & Outreach Manager
Joined the SJIVB in May



Staff at American Camp

CONCLUSION

From January through April, San Juan County and Friday Harbor lodging tax collections lagged behind 2021 collections -- which broke records -- however, they're well above 2019 collections. There's still pent-up demand for travel and people are still searching for beautiful, safe, "outdoorsy" destinations, however, we'll have to wait and see how rising gas prices, inflation, and Canadian and international travel affect our summer season and the rest of the year.

We will continue to be thoughtful with our marketing and stewardship messaging, and will continue to be advocates for the Sustainable Tourism Management Plan process, which will help guide our work into the future. This plan will help balance the quality of our vibrant economy with the quality of residents' lives, our environment, and our visitors' experiences.

Balance is the key, so that these beautiful Islands can be enjoyed by residents and visitors for generations to come.