



2023 ANNUAL REPORT

**DESTINATION
MARKETING &
MANAGEMENT
HIGHLIGHTS**

Photo by Mike Bertrand

"Take nothing but memories, leave nothing but footprints."
Chief Seattle

DESTINATION MARKETING & MANAGEMENT



OUR MISSION STATEMENT SINCE 2003

"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. All "compete" for visitors and their hard-earned dollars. Tourism is a top, integral sector of our County's economic base. The latest research by Tourism Economics reveals that visitors spent \$289.7 million here in 2022 on lodging, dining, recreation, retail, etc. 2023 statistics will be available in May.

Visitors "import" new dollars, which benefit small businesses, non-profits, and residents as these dollars trickle down and circulate throughout our Island communities. Tourism creates business opportunities and jobs, off-sets Islanders' tax burdens when visitors pay local sales tax, and "subsidizes" a variety of restaurants, retailers and other businesses and non-profits that couldn't survive via residents alone.

Tourism also helps support and sustain many community assets which residents often take for granted such as parks, farmers markets, museums, community theatres/centers, 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. We have served as San Juan County's and the Town of Friday Harbor's contracted, locally staffed destination marketing organization since 2003. Over the last 20 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 economic benefits of tourism with quality of life for residents as well as the quality of our natural and beautiful environment.

OUR GOALS SINCE 2003



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 spring, fall, and winter visitation
- Target our marketing to attract mindful visitors
- Work with media to tell authentic Island stories

2. DESTINATION MANAGEMENT VIA VISITOR EDUCATION & COMMUNITY ENGAGEMENT

- Integrate stewardship, "Love It Like a Local," and "Leave No Trace" principles into messaging on our website, social media, brochure, advertising, media relations, etc.
- Involved in local policies that impact tourism and resident quality of life; participate in SJIs Stewardship Network and Destination Management Plan process

3. MEMBER MARKETING, SUPPORT & ADVOCACY

- Marketing support for 210+ businesses and non-profits
- Connect members with potential visitors and resources via our website, media leads, travel trade leads, marketing tips, green business information, and more

OUR 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.

WHY ARE DMMOS IMPORTANT?

Destination marketing *and* management are essential to our Islands' successful tourism economy. As the local DMMO, our partnerships with businesses, non-profits, parks and public land managers, and others allow us to carefully craft messaging that best represents and educates potential visitors about our unique Islands.

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, year-round economy, protecting resident quality of life, preserving our fragile lands and waters, and creating memorable visitor experiences. We believe focusing on these four pillars is key to helping the Islands move forward responsibly into the future in regards to sustainable tourism.

ECONOMY

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

VISITOR EXPERIENCE

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



ENVIRONMENT

Educate visitors about the Islands' sustainable and regenerative tourism principles, and how we can live, work, and play in harmony with nature

RESIDENT QUALITY OF LIFE

Strive to protect our Islands' sense of place by helping to mitigate impacts of tourism by focusing on promoting shoulder seasons and stewardship messaging within our marketing

DESTINATION MANAGEMENT PLAN PROCESS

As a Destination Marketing & Management Organization (DMMO), 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 Destination Management Plan public process in the Spring of 2022. The County's Dept. of Environmental Stewardship has been spearheading this project, and our Executive Director and a Board member sit on the Steering Committee. This public plan is still a work in progress and we are hopeful that it will help shape the future of tourism in a meaningful way which reflects small business and community values. As we await the next steps, we're appreciative of the feedback received to date, especially in regards to visitor education actions. We're using this feedback to inform our work in 2024 and beyond.



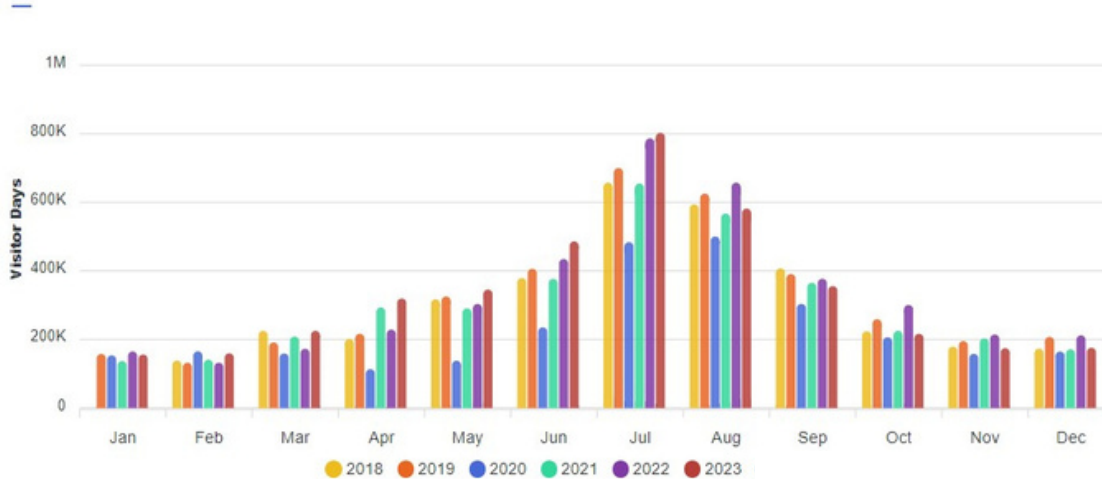
2023 VISITOR STATISTICS

Tourism is an integral sector of our County's economic base. According to Tourism Economics, in 2022 (the latest data available), visitors "imported" \$289.7 million dollars, spending them on lodging, dining, recreation, retail and transportation. These "new" dollars circulate and trickle down throughout our Island communities. Lodging tax—collected from visitors—helps fund many community assets like parks, museums, community theatres/centers, farmers markets, and more.

2023 Visitation to Lopez, Orcas & San Juan Islands

Monthly Volume by Visitor Days

All Main Dates vs Compare Dates



Datafy tracks people who live 20+ miles from the San Juan Islands via mobile devices and credit cards. Anyone from Anacortes and beyond is considered a visitor. Note that 2023 visitation was up through July, then dropped to below 2022 levels from August through December. This could likely be related to the WA State Ferries' situation and negative news which Seattleites and Washingtonians were reading.

APRIL 10, 2023 | The Seattle Times | Northwest

Hawaii is Seattle's ninth most popular vacation spot

Nearly 8% of Seattle-area adults, or around 350,000 people, visited Hawaii in the past 12 months — the ninth most popular destination for stays of at least one night.

OVERNIGHT DESTINATION	NUMBER OF PEOPLE	PERCENT OF SEATTLE-AREA ADULTS
1. Washington Coast	899,564	20.1%
2. Oregon Coast	638,568	14.3%
3. Leavenworth	628,016	14.1%
4. Portland	615,108	13.8%
5. Idaho	450,050	10.1%
6. Las Vegas	448,023	10.0%
7. Lake Chelan	377,704	8.5%
8. Spokane	368,466	8.2%
9. Hawaii	345,976	7.7%
10. Los Angeles	316,018	7.1%
11. San Juan Islands	312,748	7.0%
12. Montana	282,965	6.3%
13. Phoenix	255,190	5.7%
14. Mexico	246,817	5.5%
15. San Diego	209,224	4.7%

Source: Nielsen Prime Time

Reporting by GENE BALK, graphic by MARK NOWLIN / THE SEATTLE TIMES

The San Juan Islands were the 11th most popular vacation spot for Seattleites in 2022/2023 according to The Seattle Times. Only 1/3 as many Seattleites visited the Islands compared to the Washington Coast.

2023 Tourism Indicator Statistics

Tourism Indicator Statistics	2019	2020 (COVID)	2021	2022	2023	% Change 2022 to 2023
County Lodging Tax – "Special 2%" *	\$880,403	\$656,600	\$1,185,849	\$1,131,980	\$1,085,986	-4.06%
County Sales Tax*	\$5,018,226	\$4,885,199	\$6,428,748	\$7,089,068	\$7,017,509	-1.01%
Friday Harbor Lodging Tax – "Special 2%" *	\$241,942	\$141,516	\$295,221	\$310,813	\$294,736	-5.17%
Friday Harbor Sales Tax*	\$1,404,699	\$1,206,962	\$1,602,100	\$1,721,792	\$1,792,376	+4.10%
Lopez Island Lodging Tax	\$50,310	\$55,495	\$87,871	\$81,990	\$73,451	-10.4%
Orcas Island Lodging Tax	\$446,419	\$313,430	\$576,763	\$613,663	\$602,745	-1.78%
San Juan Island Lodging Tax*	\$383,678	\$263,020	\$487,214	\$436,327	\$409,790	-6.08%
WSF Anacortes to San Juans Total Riders	2,025,923	1,416,037	1,928,441	1,890,458	1,932,543	+2.2%
WSF Anacortes to Lopez Island Total Riders	317,329	240,298	300,109	295,460	306,502	+3.7%
WSF Anacortes to Orcas Island Total Riders	677,400	462,941	626,425	609,951	619,601	+1.6%
WSF Anacortes to FH/SJI Total Riders	896,384	604,405	876,244	869,851	897,055	+3.1%

* Town of Friday Harbor lodging and sales tax is collected separately from the rest of San Juan Island and San Juan County

It's important to note that 2021 and 2022 were record-setting years due to pent up demand for travel following COVID.



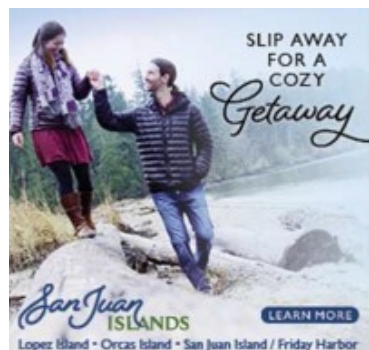
SUPPORTING OUR ECONOMY VIA DESTINATION MARKETING

Our marketing efforts—to help support and strengthen the Islands' year-round tourism economy, and as a result, the County's overall economy—are split between "paid" advertising, "earned" media coverage, and "owned" social media content. Our seasonal advertising campaigns target our main feeder/drive market—the Greater Seattle area—while media relations, our consumer e-newsletter, and social media efforts help us reach beyond Seattle.

SEASONAL ADVERTISING CAMPAIGNS

"PAID"

EXAMPLES OF OUR SEASONAL ADS



We garnered approximately 7,391,134 online advertising impressions in the Greater Seattle area. We also placed print ads in magazines like NW Travel & Life, as well as in the WA State Visitors Guide and Seattle Visitors Guide.



MEDIA RELATIONS

"EARNED"

Our media relations focus is to emphasize our unique Islands and experiences, as well as 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 stories.

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

\$6.2 MILLION

MEDIA ADVERTISING
EQUIVALENCY VALUE

23

HOSTED MEDIA
GUESTS &
CREATORS

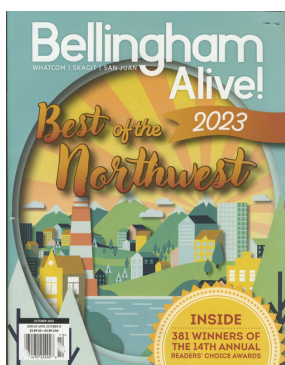
1.8 BILLION REACH

VIA CISION + PRINT & ONLINE
TRACKED TRAVEL ARTICLES

399

ISLANDS MENTIONS IN
PRINT & ONLINE
ARTICLES

Among the press trips we've helped host this year, three writers were on assignment for *Boulevard*, *Bellingham Alive*, *Seattle*, and *1889*. Three articles have been published so far in *Boulevard* (Vancouver & Victoria) and *Seattle*.



NOTABLE MEDIA FEATURING THE ISLANDS:

Seattle magazine, *LonelyPlanet.com*, *Seattle Refined*, *Sunset*, *Travel+Leisure.com*, *AAA*, and *Boulevard Vancouver*



PROTECTING OUR ENVIRONMENT VIA STEWARDSHIP MESSAGING

The Islands' trails, forests, fields, waterways, and heritage sites are valuable and treasured by both residents and visitors. Our Communications/Stewardship 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 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

18,958 VISITS

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

2,129 VISITS

TO OUR
"RESPONSIBLE WILDLIFE
WATCHING" PAGE

1,433 VISITS

TO OUR
"SAN JUAN ISLANDS
PLEDGE" PAGE

325 SIGNATURES

ON OUR
SAN JUAN ISLANDS
PLEDGE

PARTICIPATING IN THE CONVERSATION

- Our Communications/Stewardship Manager was a panelist on "Regenerative Tourism: a Paradigm Shift in Travel" at Public Relations Society of America (PRSA)'s annual Travel & Tourism Conference in Madison, WI.
- Our Communications/Stewardship Manager was asked to provide input to Port of Seattle and The Travel Foundation for new Responsible Travel Handbook for Washington Tourism Organizations

EXAMPLES IN OUR 2023 TRAVEL BROCHURE

SET YOUR MIND TO ISLAND TIME

THINGS CHANGE ON ISLAND TIME.

Priorities re-sort. The rush of the daily grind falls away. And suddenly you're more mindful of the fragile, magical environment that surrounds us. It's an environment we all cherish and want to protect.



LOVE IT LIKE A LOCAL

AS YOU EMBRACE island time, we invite you to "Love It Like a Local" and treat the San Juans with the same care and respect as you would your own backyard. Here are a few ways to preserve the qualities that make this place special, and enhance your own visit in the process.

BOOK EARLY. Ferries, accommodations, and tours can fill quickly.

CONSIDER LEAVING THE CAR BEHIND. Walk or bike onto the ferry and use options below to get around.

TREAD LIGHTLY. Stick to designated trails, campsites, and parking.

GIVE WILDLIFE SPACE. Don't disturb or feed wildlife on land or water.

BE CAREFUL WITH WATER AND FIRE. Be mindful of water use and keep campfires in rings.

MIND THE DOG. Keep pets on leash and pick up waste.

AVOID MID-DAY CROWDS. Visit popular trails and attractions early or late for the best experience.

BE A GOOD NEIGHBOR. Be patient, share the road with bicyclists, and keep speed and noise down.

LOOK FOR OUR LOW-CARBON AMENITIES:

- Shuttles, trolleys, and taxis to see the sights
- Electric vehicle charging stations
- Bikes, mopeds, and hybrids for rent
- Water bottle refilling stations



COME AS YOU ARE



OUR TEMPERATE CLIMATE, island time philosophy, and friendly locals are welcoming to all. Our community thrives on a talented and eclectic mix of artists, chefs, entrepreneurs, farmers, whale researchers, and outdoor guides—all with different identities and stories to tell. Strike up a conversation with a local, and you may find a kindred spirit.



MAINTAINING RESIDENT QUALITY OF LIFE VIA ENGAGEMENT

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, we're involved in the County's Destination Management Plan public process and action plan which began in Spring 2022, noted on page 3. We're awaiting the next steps.

Community Involvement

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

- Destination Management Plan Steering Committee (Deborah & Laura Saccio, Board Member)
- Stewardship Network of the San Juans (Amy is Chair)
- SJIs Monument Advisory Committee (Amy)
- San Juan Is. Chamber of Commerce Board (Deborah)
- Orcas Island Chamber of Commerce Board (Anna)
- SJIs WSF Schedule Update Task Force (Deborah & Laura Saccio, Board Member)
- Friends of Lime Kiln Society Volunteer (Amy)
- San Juan Community Theatre Volunteer (Annesa)

Community Relations

- Published a four-part series of articles in all three of Sound Publishing's newspapers detailing the various aspects of Visitors Bureau marketing and management work
- Contributed an article to Sound Publishing's SpringTide guide about the National Monument, as well as our Islands map

Marketing the Shoulder Seasons

- Our marketing is focused on spring, fall, and winter visitation to help balance year-round economic vitality for small business owners, employees, and residents.

Participating in the Conversation

- Partnered with the Terrestrial Managers on educational practices around the treatment and protection of San Juan Island foxes to help mitigate human-wildlife conflict

Supporting our Community

- Staff volunteered at events like the Great Islands Cleanup and San Juan Island Pride Festival
- For the sixth year, we offered \$3,000 in scholarships, from our Membership fund, to seniors at each of the three Islands' public high schools pursuing degrees in hospitality, business/communications, or related fields
- Continued to assist the County's Dept. of Environmental Stewardship in distributing Stewardship Guides to lodgings, VRBOs and Airbnbs

THE SAN JUAN ISLANDS PLEDGE
325 SIGNATURES ON OUR PLEDGE PAGE
AS OF DECEMBER 31
1,433 VISITS TO THE PLEDGE PAGE

*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 venture into unfamiliar places
while staying on familiar trails.
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.*

ELEVATING VISITOR EXPERIENCES VIA EDUCATION

Our messaging seeks to educate potential visitors about the Islands and how to both plan a memorable trip *and* be mindful travelers. While promoting our business and non-profit members, we also share guidelines on how to travel in eco-friendly and responsible ways—for example, bring a reusable water bottle, conserve water, tread lightly, respect wildlife, etc. We also strive to make all potential visitors feel welcome via our IDEA initiatives (see below).

TRIP PLANNING, INSPIRATION & EDUCATION



1.16 MILLION
WEB SESSIONS
+2.6% YOY
VISITSANJUANS.COM



20,101
E-NEWSLETTER
SUBSCRIBERS
+10.4% YOY

SOCIAL MEDIA ("OWNED")



24,828
FOLLOWERS
+1.6% YOY



13,100
FOLLOWERS
+10.4% YOY



4,970
FOLLOWERS
-1.8% YOY

ENGAGING WITH POTENTIAL VISITORS



727
PHONE
CALLS
-6% YOY*



741
EMAILS
RECEIVED
-13% YOY*



8,578
BROCHURES
MAILED
+21% YOY

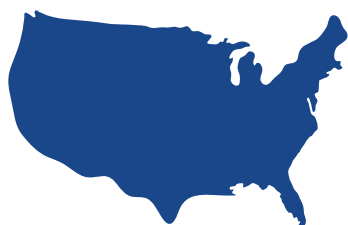
55,000
TOTAL
BROCHURES
PRINTED &
DISTRIBUTED
VIA RACKS, ETC.

*Negative numbers re: phone calls and emails aren't alarming; more and more people are ordering travel brochures directly from our website

WHERE WERE OUR 2023 VISITORS FROM?

Top states according to Datafy

1. Washington 73.2%
2. Oregon 5.4%
3. California 4.9%
4. Texas 2.3%
5. Arizona 1.5%
6. Idaho 1.4%
7. Florida 1.3%
8. Colorado 1%
9. Utah 0.8%
10. Illinois 0.7%



"IDEA" INITIATIVES

INCLUSION, DIVERSITY, EQUITY & ACCESS

We are committed to addressing any gaps in our knowledge and protocols, and to improving our practices and increasing representation in the Islands.

We acknowledge that there is 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.



"IDEA" VIA MEDIA RELATIONS

- Hosted Seattle-based couple Traveling While Black on San Juan Island, who rate destinations based on how welcome they feel as Black travelers. They gave Friday Harbor/San Juan Island a 5 out of 5!
- Our Communications/Stewardship Manager participated as a panelist in a Skillshop hosted by State of Washington Tourism to highlight our partnership with Disabled Hikers, see below.



"IDEA" ON OUR WEBSITE

- Collaborated with non-profit Disabled Hikers to create a SJIs Accessible Trail Guide in April. The final guide was posted to our website in September at www.VisitSanJuans.com/Accessible.
- Posted new content written by the Learners and Makers, creators specializing in accessible family travel (mom is an amputee).

2,836 VISITS

TO OUR "ACCESSIBLE SAN JUANS" WEB PAGE



2023 LEADERSHIP

BOARD OF DIRECTORS

ANNA MARIA DE FREITAS

President
Harrison House/Tucker House/Coho
Restaurant, San Juan Island

LYDIA MILLER

Vice President
Pebble Cove Farm, Orcas Island

ANTHONY ROVENTE

Treasurer/Secretary
The Edenwild Boutique Inn, Lopez Island

LAURA SACCIO

Earthbox Inn & Spa/Bird Rock Hotel
San Juan Island

JEFF FRIEDMAN

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

KENDRA SMITH

SJ County Dept. of Environmental
Stewardship & Terrestrial Managers Rep

AMANDA ZIMLICH

Otter's Pond B&B, Orcas Island

BECKI DAY

San Juan Island Chamber Director

CAREY ESKRIDGE

Orcas Island Chamber Director

ANDREA HUSS

Lopez Island Chamber Director

STAFF

DEBORAH HOSKINSON

Executive Director

AMY NESLER

Communications & Stewardship Manager

ANNESA KNOWLES

Visitor & Member Services Manager

ANNA ERICKSON

Digital Marketing & Outreach Manager

AGENCIES/CONSULTANTS

The Communications Group

Drozian Webworks

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 the Islands' tourism industry by providing an expansive platform to promote their services via our website, social media, media relations, 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.

MEMBERSHIP: BUSINESSES & NON-PROFITS



211
MEMBERS
ON 3 MAIN
ISLANDS



20
NEW
MEMBERS

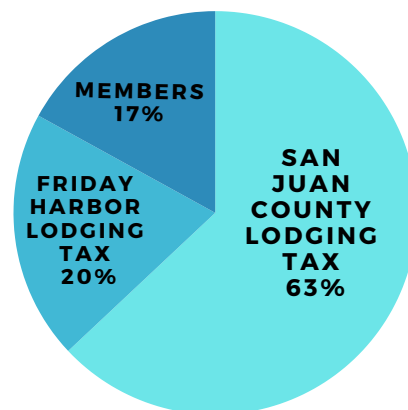


63
MEMBER
NEWSLETTERS
& ACTION ITEMS



OUR FUNDING MIX

Our annual County and Friday Harbor lodging tax funding is based on the previous years' collections. Our 2023 County funding was 26% of total 2022 collections, while remaining funds were granted to tourism-related community assets on Lopez, Orcas, and San Juan Islands including museums (historical & art), community theatres/centers, farmers markets, parks and fair, film fests, events, trail maintenance, stewardship projects, and more. Our 2023 Friday Harbor lodging tax grant was 30% of 2022 collections, while some funds were also granted to tourism-related community assets. We supplement our annual County/Friday Harbor lodging tax funding with membership dues and website advertising fees. We reserve some of these membership funds as a "best practice."



IN CONCLUSION

We will continue to be thoughtful with our marketing and stewardship messaging as we maintain our focus on responsible, sustainable tourism. *Balance is the key, so that these beautiful Islands can be enjoyed by residents, wildlife, and visitors for generations to come.*