



2020 Semi-Annual Destination Marketing & Management Report

And then came COVID.....

The Visitors Bureau was humming along, as in year's past, with our Winter Romance campaign during January and February, followed by our Spring campaign, launched March 1. **But on March 16, we paused our advertising campaign, and nothing has been the same since.** The economic effects of COVID-19 hit the tourism industry especially hard -- in San Juan County and around the world -- with tourism businesses and organizations seeing unprecedented declines in revenue, leading to unprecedented declines in sales tax revenue for counties, towns, states and countries. Only time, and statistics, will determine when San Juan County will move to Phase 3. In the meantime, despite cuts to all staff hours, we've been keeping members informed of opportunities for economic relief, and keeping the Islands on travelers' radars with soft messaging until it's appropriate to proactively welcome visitors back once again...

Tourism, when managed responsibly, is a key economic development strategy for small, rural towns and counties, as well as big cities and countries. Since 2003, our mission has been *"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 is a top economic driver for San Juan County. We can all agree that our economy should be more diversified, however, currently, tourism is a vital sector. The latest research by Tourism Economics, a new contractor to the Washington Tourism Alliance, reveals that visitors spent approximately **\$236,200,000 in our county in 2019** on lodging, food and beverage, recreation, retail and transportation. Visitors "import" new dollars into our economy, which benefit small businesses, non-profits and residents as these dollars circulate throughout our Island communities. Tourism creates business opportunities and jobs. Tourism off-sets Islanders' tax burdens when visitors pay local sales tax, which helps pay for our local government services and infrastructure. Tourism helps improve residents' quality of life by "subsidizing" a variety of restaurants and retailers. And tourism 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.

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. 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 brides and grooms inviting guests to spend a couple of nights and thousands of dollars locally. **Below you'll find our January–June 2020 destination marketing and management highlights.**

January–June 2020 Numbers at a Glance

286 business and non-profit members/partners

-50% in County lodging tax and -9% in sales tax through May YOY

-57% in Friday Harbor lodging tax and -15% in sales tax through May YOY

Conservative 342,015,000 media reach via 254+ print & online tracked travel articles

Media advertising equivalency value of \$1,766,000+

382,129 web sessions (-35% YOY) and 2,828,904 page views (+29% YOY)

21,830 Facebook followers and 5,098 Twitter followers

19,182 E-newsletter subscribers and 7,777 Instagram followers

Approx. 232 calls, 192 emails, 1,040 website forms, plus 288 other requests for visitor info/brochures

About Us – The Business Association of San Juan County, dba San Juan Islands Visitors Bureau (SJIVB), was formed in 1999. We are a non-profit, 501(c)6 economic development agency responsible for competitively marketing the Islands as a premier, year-round travel destination. The SJIVB has served as San Juan County's and the Town of Friday Harbor's contracted, locally-staffed *destination marketing organization* (DMO) since 2003. In the last few years, we, like many DMOs from around the world, have

evolved into a *destination marketing and management organization* as we continue to focus more keenly on responsible, stewardship-minded tourism which balances the quality of our economy and visitor experiences with the quality of residents' lives and the environment.

Our Mission – See first paragraph.

Our 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**; and, 4) To enhance visitors' travel experiences countywide.

Brand Positioning Statement – “The SJIVB helps people imagine and plan a getaway for themselves, and their family and/or friends, that will reconnect them to a quality of life where there's breathtaking beauty, rich activities, and wonder and discovery encased in a soothing, rural, small-town atmosphere, where life feels a little slower paced and a little safer.”

Membership – We gained **10 new members** for a **total of 286** on all four, ferry-served Islands and the mainland. We held our annual Lopez Island spring brown bag lunch on April 7 via Zoom, but decided against holding our annual spring Membership Luncheon on Orcas Island in May. We emailed members our **News & Marketing Updates e-newsletters** at least once a week since mid-March when COVID became a national and Island-wide issue.

Board of Directors – Our Board typically meets monthly, except July–September, however, due to COVID, the Board began meeting weekly via Zoom in April. Our Board represents community leaders on Lopez, Orcas and San Juan Islands and includes: President - **Meaghan Felso**, Friday Harbor House, San Juan Island; Treasurer - **Anna Maria de Freitas**, Harrison House/Tucker House/Coho Restaurant, SJI; Secretary - **Lydia Miller**, Pebble Cove Farm, Orcas Island; Lopez Chamber Director - **Christa Campbell**; Orcas Chamber Director - **Lance Evans**; San Juan Chamber Director - **Becki Day**; SJC Economic Development Council Rep – **Bill Appel**; County LTAC Rep - **Laura Saccio**, Earthbox Inn & Spa/Bird Rock Hotel, SJI; **Anthony Rovente**, The Edenwild Boutique Inn, Lopez Island; **Holly Southern**, Kingfish Inn/Restaurant, Orcas Island; Appointed Outdoor Activities Rep - **Sally Thomsen**, San Juan Kayak Expeditions, SJI; and in mid June we added Whale & Wildlife Watching Advisor – **Jeff Friedman**, Maya's Legacy Tours and President of the Pacific Whale Watch Association.

Staff & Consultants – Due to COVID, all staff hours were cut from 10-50% in April, depending on positions and responsibilities. Marketing staff includes **Deborah Hoskinson**, Executive/Marketing Director; **Barbara Marrett**, Communications/Film Liaison/Stewardship Manager; **Kimberly Albert**, Visitor/Membership Services Manager; **Amy Nesler**, Communications/Stewardship Coordinator, and **Erin Wygant**, Marketing Content/Outreach Coordinator. We contracted with **Meaghan Rader** of Rader Bookkeeping. We contracted with consultants **The Communications Group** and **No. 10 Web Company/Cellar Door Media**, both in the Seattle/Puget Sound area. On June 1, **Drozian Webworks** officially took over the hosting and management contract for our website; they are a small company specializing in DMO websites, SEO and analytics.

DESTINATION MARKETING & MANAGEMENT HIGHLIGHTS

We implemented the following destination marketing and management strategies to create awareness of the San Juan Islands brand, primarily targeting the growing **Seattle area** in order to put “heads in beds” and “feet on streets.” **As noted in our introduction, and below, most of our strategies changed in mid March, when COVID became a reality.**

New Logo – We worked with The Communications Group and our graphic designer to update the look of our eight-year-old logo she had previously designed, and settled on the logo at the top of this report -- a more casual look than before.

COVID Messaging – On Monday, March 16, our traditional marketing strategies ground to a halt, and we pivoted our energies to providing travel advisory information and soft messaging to travel “dreamers” and “planners.”

- We built a **travel advisory page** (www.visitsanjuans.com/travel-advisory) to update locals and visitors of changing COVID information. It includes info about wearing masks, a “**Stay Safe Pledge**” and **travel planning checklist** we created for members and potential visitors (see below), and links to the San Juan County website, as well as other helpful websites including the Washington State Department of Health and the Governor's COVID information.
- We designed a “**Stay Safe Pledge**” poster and “Guidelines for Enjoying Your Visit to the San Juan Islands” handout. These documents are found on a new “Stay Safe” page, www.visitsanjuans.com/staysafe, and were printed/mailed with brochures.
- We started creating **virtual experiences** for visitors to stay connected to the Islands, to help them to continue to dream about, and plan for, a vacation here. Visitors were directed to a “Virtual Vacations” landing page where 10 virtual experiences were compiled, www.visitsanjuans.com/itineraries/virtual-vacations-to-the-san-juan-islands.

- We developed the **#SanJuanIslandsTime Challenge** (www.visitsanjuans.com/itineraries/sanjuanislandstime-challenge) that encouraged locals, businesses, and visitors to share what #SanJuanIslandsTime means to them. Videos and photos were posted online using the hashtag, and reposted by the @VisitSanJuans Facebook and Instagram accounts. We then edited together a video showcasing all of the submissions, www.youtube.com/watch?v=Kpi75uJ9gK0. This campaign encouraged thoughtful reflection of Island values and kept the San Juans top of mind for many travelers.
- We produced **two videos** to address COVID. The first was a minute-long video assuring potential travelers the Islands hope to welcome them back soon, when it is safe to do so, www.youtube.com/watch?v=ro5un5lyZvl. The second video supports the #SanJuanIslandsTime Challenge, linked and explained above.

Destination Management & Visitor Education – *Our quality of life and economy depend on our beautiful environment. We are mindful of balancing vibrant economic development with Island/community culture, stewardship ethics, and visitor education.*

- **Leave No Trace Videos** – We continued filming our Leave No Trace video series using local kids to spread cute, humorous messages about proper preparation for a visit to the Islands (i.e., ferry reservations, rain gear, etc.) and to make sure to “leave it as you find it” (not picking flowers, gathering seashells, and taking trash with you), www.visitsanjuans.com/island-kids-explain. (At the time of this report, these videos are still being edited.) The goal is to film two more videos this year to cover the other LNT principles regarding sticking to trails and being considerate of other visitors, but this will depend on social distancing and other health and safety requirements.
- **Responsible Tourism** – Before 2020 and COVID, the focus of tourism dialogue was on preventing overtourism. In response, we have been strategizing on how best to promote responsible tourism. Responsible tourism requires that the tourism industry, governments, residents and visitors take responsibility and action to make tourism more sustainable. While visitor numbers have been reduced during COVID, we continued to work on strategies to avoid the perception/reality of overtourism here again, and into the future, including encouraging a county-wide **Tourism Management Plan** via a Lodging Tax Advisory Committee (LTAC) grant. We attended IMPACT Victoria in January, focused on sustainability in tourism, and an opportunity to connect with DMOs and organizations to share ideas and collaborate.

Website – All of our marketing strategies drive consumers to our website, www.VisitSanJuans.com, our #1 marketing tool.

We terminated our contract with No. 10 Web Company/Cellar Door Media in May and began working with Drozian Webworks, which specializes in DMOs. Drozian designed a new website that prioritizes usability, data-driven design, and conversions. The new site officially launched on May 28. Drozian provides monthly reports and advise on website updates based on user traffic and behaviors. We continuously update the website with new, in-house content – new information, experiences, blogs, photos, etc. In response to COVID, we added a travel advisory page, San Juan Islands Strong page, virtual vacations, a safety guidelines and checklist page, and more COVID cautionary language throughout the site. We’ve continued to contract with **Book>Direct** for their lodging availability and pricing calendar. Book>Direct generates monthly, quarterly and year-end reports that help us track our progress and better serve our members, so we can compete with OTA’s websites like Booking.com, etc.

According to **Google Analytics**, our 2020 web ‘sessions’ were down -35% (382,129 vs. 590,947) year-over-year, but page views were up 29% (2,828,904 vs. 2,181,990). In addition to COVID, in general, DMO website traffic growth has slowed due to the myriad of travel websites in the marketplace including Google Trips, TripAdvisor, Airbnb, VRBO, etc., however, according to recent national research, DMO websites are still relevant travel and education tools.

- **Age groups** viewing our website were: 18-24 = 8%, 25-34 = 25%, 35-44 = 16%, 45-54 = 17%, 55-64 = 16% and 65+ = 16%.
- 75% of our users were **new** and 25% were returning users. Females accounted for 62%, males for 38%.
- **Technology used** to view our website: desktop 45% (+4.3% YOY), mobile 49% (+4.4% YOY), and tablet 5% (-44% YOY)
- Viewers were from the following **locations**: U.S. 93% (WA 48%, CA 10%, OR 6%, TX 3%), Canada 2% (BC 66%, ON 15%)

Social Media – We continued to focus the majority of our social media efforts on the three major platforms – **Facebook, Twitter and Instagram**. Since COVID, we’ve used social media to share virtual vacation opportunities and updated travel information. Our number of followers continues to rise, although at a slower pace than last year. See www.facebook.com/VisitSanJuans, <https://twitter.com/visitSJIslands>, and www.instagram.com/visitsanjuans.



21,830 followers
Up 6.2% since Jan.
[@visitsanjuans](https://www.facebook.com/visitsanjuans)



5,098 followers
Up 6.6% since Jan.
[@visitsjislands](https://twitter.com/visitsjislands)



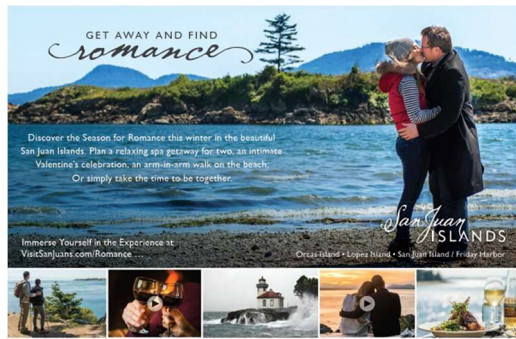
7,777 followers
Up 11.1% since Jan.
[@visitsanjuans](https://www.instagram.com/visitsanjuans)

E-Newsletters – Since January, we’ve sent out eight consumer e-newsletters, including two special wedding editions in February as follow-up to wedding shows. We increased our subscribers to **19,182**, up +5.3% since January, with a consistent open rate of about 33%. We also write a membership e-newsletter, which we’ve been sending out weekly with relevant COVID information.

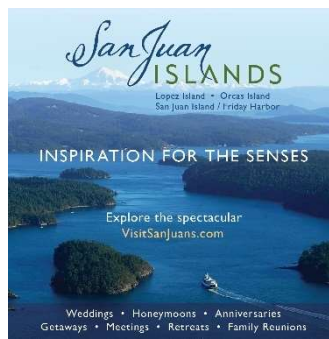
Travel Brochure – We continued to partner with the **three Chambers of Commerce** to produce a “family” of 2020 brochures which look similar in branding. (The Orcas Chamber is continuing to use their 2019-2020 version.) We published 88,000 updated copies, which include the **seven principles of Leave No Trace**, a **new stewardship message**, **EV charging stations** info, and our two **State Scenic Byways**. Brochures were sent out as fulfillment for visitor information requests via phone, email, website, and advertising leads; in media kits; at wedding shows; and were distributed by **Certified Folder Display Services in approximately 530 locations** in NW Washington, on all Washington State Ferries, and at the Anacortes and Sidney B.C. terminals.

Regional Travel Guides – We placed ads in these annual, key, regional, ‘portal’ travel guides, and their corresponding websites: (1) **Seattle Visitors Guide** (350,000 readership, winter/spring) and www.VisitSeattle.org, and (2) **Washington State Visitors Guide** (937,500 readership) and www.ExperienceWA.com. We also placed a scenic byway ad and listing in the **Scenic Washington State 365 Scenic Drives & Road Trips Guide** (400,000 circulation).

Seasonal Advertising Campaigns – Thanks to our lodging tax contract with the Town of Friday Harbor, which supplements our County contract, we continued to retain The Communications Group to create and manage seasonal advertising campaigns targeted to the Seattle area. We ran our **Winter Romance** campaign during January and February. Our **Spring Campaign** began March 1 but was **paused on March 16 due to COVID**. We resumed our campaign on June 16, focusing on wellness and outdoor activities, when many County officials anticipated we would be moving to Phase 3 within a day or two, but **suspended it again on July 6** after our County Health officer postponed the original application to Phase 3 and then the Governor paused all requests for phase changes. Below are a few samples of our 2020 print and online ads. Our TV ads and “Voices of the Islands” videos can be found on our YouTube channel at www.youtube.com/user/visitSJIslands under the “Home” and “Videos” tabs. (Detailed seasonal campaign reports are available.)



Winter Romance Campaign

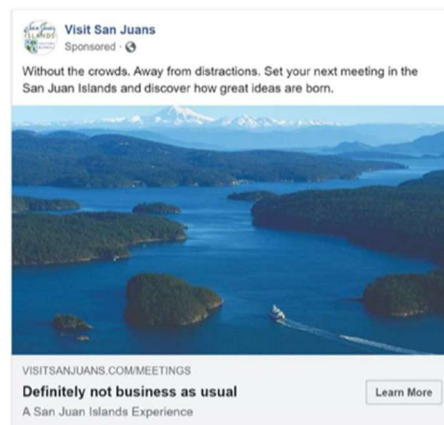


WA State & Visit Seattle Ads



Spring Campaign

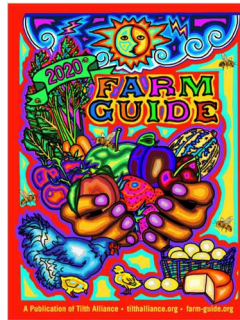
Meetings & Retreats Campaign – Our Winter/Spring regional campaign ran from January until mid March, when we paused it due to COVID. Our webpages can be found at these links: www.visitsanjuans.com/meetings, www.visitsanjuans.com/meetings-venues-summary and www.visitsanjuans.com/meetings-venues. Our team building webpage can be found at: www.visitsanjuans.com/team-building.



Destination Weddings – Destination weddings, honeymoons and anniversaries are big business for the Islands – one bride and groom can (typically) invite a hundred or so guests here, who book lodgings, eat in restaurants, shop, kayak, golf, spa, etc.

- We distributed approximately 300 of our six-page destination wedding brochures, plus travel brochures, at the annual **Seattle and Portland Wedding Shows** in January, and to brides-to-be who called our office. In addition, we partnered with The Journal, Souder and Weekly to distribute a wedding resource guide at both shows. As a follow up to the shows, we emailed two special edition e-newsletters in February to brides who provided their emails.
- We placed a full-page advertorial in Seattle’s top wedding guidebook, the **B&E Wedding Guide**, www.butlerevents.com.

Agritourism & Culinary Tourism – We’ve been partnering with the Ag community since 2008 when we created “Savor the San Juans” as the focus of our fall marketing campaign, and we also partner with them on some spring marketing. We continued to help fund a full-page advertisement in the **2020 Tilth Alliance Farm Guide** state-wide directory, below, which promoted the San Juan County Farm to Market Guide and “Savor the San Juans.” 100,000 copies were published in April and distributed to approximately 275,000 readers throughout Puget Sound in over 700 locations. See page 44 at <https://farm-guide.org/wp-content/uploads/2020/05/2020-FarmGuide-web.pdf>. (We did not exhibit at Taste Washington in March, which was cancelled.)



Heritage Tourism – For the ninth annual May “History Lives Here” promotion -- typically in partnership with Friday Harbor, the museums and historical park -- due to COVID we simply created an Islands’ history book blog and promoted it via social media.

Cultural Tourism – We met with the Friday Harbor Arts Commission and/or a rep three times this spring and summer, with the goal of creating a special event for artists, similar to, or in tandem with, “Savor the San Juans,” in order to begin more specifically promoting our Islands’ arts and artists. We’ll continue to meet with them and other art groups to move this forward.

NW Washington Partnership Marketing – DMOs from around the state were again invited to apply for highly-reduced advertising space at Sea-Tac via a lottery system. We were chosen for one of 24 spots available Q1 January-March. This enabled us to secure Alaska Airlines Concourse C with a 62”w x 43”h diorama ad. This is their largest terminal, serving 25% of Sea-Tac’s passengers, approximately 773,000 domestic plus 12,000 international visitors. We were also chosen for Q2 but turned it down due to COVID.

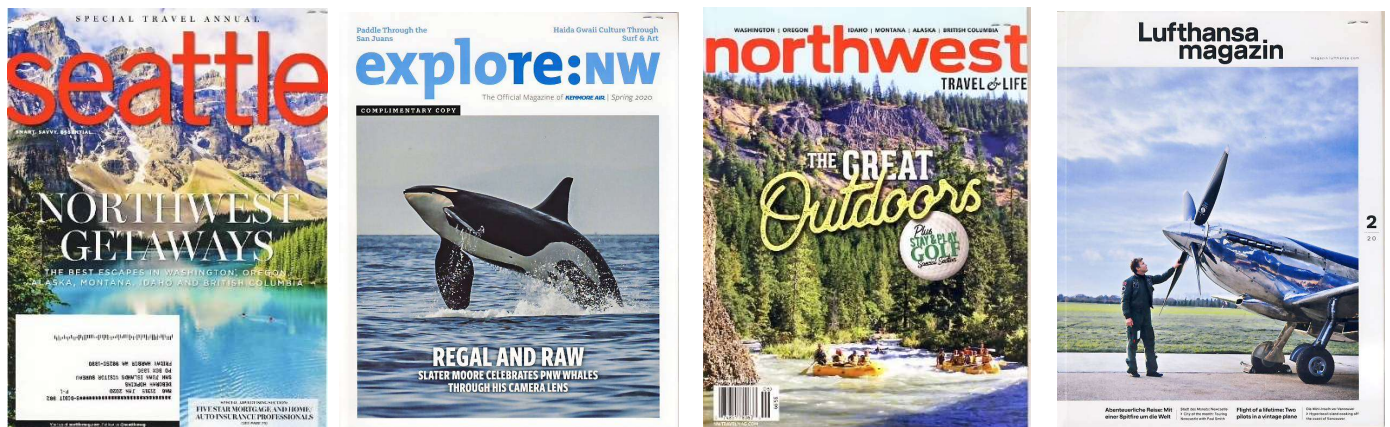
Scenic Byways – We continued to promote the two Scenic Byways on Orcas and San Juan Islands by denoting them on the maps in our annually printed brochure, on our website, on WSDOT’s scenic byways web page, on its own Facebook page, and in the 100-page **Scenic Washington State 365 Scenic Drives & Road Trips Guide**. Shopkeepers on Orcas and San Juan Islands continued to promote it via popular merchandise including posters, wooden signs, mugs, coasters, etc.

Media Relations – The San Juan Islands are one of the few destinations in the state to have a **dedicated media relations staff**, an important reason why the Islands consistently enjoy excellent media coverage, even now during the COVID “pause” in actual travel. We have temporarily suspended traveling for media blitzes (when we meet with top travel editors in CA or NY) and media marketplaces. **We hosted a virtual Islands tour for the International Food & Wine Travelers Association** (25+ were on Zoom) and a link was shared on social media. We actively participated in a Travel USA Twitter Party to virtually promote the Islands for future travel. We were interviewed during a World Foodprints podcast to give listeners a snapshot of what was happening in the Islands early in the pandemic, and also to provide inspiration for future travel. Barbara was one of the speakers at a NATJA virtual annual conference. We will continue to do virtual tours for media as the opportunity arises. We sent out press releases about what’s “New & Cool” to keep the Islands top of mind for future travel, while reminding folks of what phase we are in and local mask requirements. We continued to update our comprehensive media pages on our website, and will host journalists on press trips when it is safe to do so. In the meantime, we will connect with journalists via email to check in and keep the Islands as a source of inspiration for their future stories. These are a few ways **we proactively engage media to “earn” media coverage**.

Press Trips – In our continuing efforts to court top publications and influential journalists, we hosted or assisted **6 journalists**, influencers and photographers on **6 press trips earlier in the spring**. **We cancelled 8 scheduled trips due to COVID**. (Last year by this time we had hosted 24 people on 19 press trips.) Among the publications represented were TheManual.com, Uprox.com, ShermansTravel.com, The New York Post, Sip Northwest, Northwest Travel, The Ranger, NorthwestMilitary.com, Seattelite.com, TheRoyalTourblog.com, and Honolulu Star Advertiser.

Media Marketplaces & Sales Missions – Due to COVID, all media relations travel was cancelled. We hope to attend one travel writers marketplace this fall.

Media Coverage – We tracked coverage of the Islands in over **254 print and online articles**. The outlets producing the highest reach and ad value for a feature article or roundup were People.com (27m) (about the local whale-poop-sniffing dog!), LonelyPlanet.com (2 articles, 11m and 10m, respectively), and ReadersDigest.com (7m). According to Cision & Meltwater, our media tracking services, **online reach for January-June was over 342,015,000**. **Total publicity value was over \$1,766,000**. For top stories, see www.visitsanjuans.com/san-juan-islands-news.



Media Leads – We responded to and/or shared **35 significant media leads** with our members, generated from our marketing efforts, as well as efforts by the Washington Tourism Alliance, Visit Seattle and the Port of Seattle. This is an important tool to stay top of mind, during COVID, without having media travel here nor the expense of hosting them.

Inclusion in “best” or “top” lists is often the result of our responding to a time-sensitive media query through a third-party service called HARO (Help A Reporter Out). Stories in January–June included these high-reach, “best” lists (ranked by reach):

- “The Best Bike Touring Destinations in the U.S.,” TheOnlineRocket.com
- “9 Places You Can and Should Travel by Float Plane,” TheMatadorNetwork.com
- “Best Whale Watching Spots in the United States,” Tripsavvy.com
- “When We Travel Again: Orca Watching Across the World,” Femina.com
- “10 Breathtaking Spots for Whale Watching in Washington Without a Boat,” KOMONews.com
- “No Passport Required Beach Destinations,” HGTV.com
- “101 Things Every American Should Do in the U.S. in Their Lifetime,” (see orcas in Washington State), MSN.com
- “Keep Love Alive: The Most Romantic Towns in the United States,” (Friday Harbor), *San Diego Entertainer Magazine*
- “These Destinations Will Bring Your Kid’s Favorite Books to Life,” LonelyPlanet.com
- “6 Romantic Weekend Getaways From Seattle to Escape the Chill and Cuddle Up,” SeattlePI.com
- “6 Great Pacific Northwest Vacation Ideas,” Wiki.ezvid.com
- “15 of the Best U.S. Cities for a Weekend Trip,” Insider.com
- “Corporate Getaways: 11 Resorts for Your Next Seattle-area Company Retreat,” (Lakedale Resort), SeattleTimes.com
- “Top 7 Outdoor Seattle Adventures to Scale in 2020,” TheSeattleLesbian.com
- “The 11 Most Peaceful Places on Earth,” (Orcas Island), RD.com (Reader’s Digest)
- “Charming Spots for a Coastal Stay,” *Travel 50 & Beyond* magazine
- “10 Great Places to See in 2020, From the Woman Who Popularized the Bucket List,” USAToday.com

Cision & Meltwater Tracking Reports – We contract with these **media tracking services** to create semi-annual and annual reports utilizing data from travel articles and social media tracked throughout the year. The reports help measure the effectiveness of our communications strategies and see which topics received the most traction, when and where. **A copy of the January-June document is attached, note the tabs along the bottom.**

Photos & B-roll Video – We are often asked to **provide photos** for upcoming books, articles, and promotional materials, as well as **b-roll (video clips)** for films and television, all of which bring new business to the Islands. We fulfilled **28 requests** for photos and b-roll during the first half of 2020. (Last year at this time we had fulfilled more than 42 requests.)

Government/Port/WA State Ferries Relations

- Barbara is a **Port of Friday Harbor Commissioner**; she helps collaborate with the Port on advertising, media relations, events and shared tourism issues.
- Deborah continued to represent tourism and the Scenic Byways on the **SJC Ferry Advisory Committee (FAC)**.

Community/Islands Relations

- **Tourism impacts many Islands’ organizations’ missions**, and as a result, various staff are members of several committees including the Stewardship Network of the San Juans (Amy is Chair), Salish Sea Association of Marine Naturalists, Leave No Trace Committee, and we participate with the Ag community on various projects.
- For the third year, we offered three **\$1,000 scholarships** to all three Islands’ public high schools, to seniors pursuing degrees in tourism/hospitality or a related business/marketing degree. This year they were awarded at virtual graduations.

Crisis Communications – We continued to update our **Crisis Communications Plan** and forge stronger relationships with local first responders, communications managers, and the SJC Department of Emergency Management (DEM). During COVID we have been in frequent communication with the Director of the DEM regarding messaging for our travel advisory and other communications.

VISITOR SERVICES HIGHLIGHTS

SJIVB Visitor Services – We answered approximately **232 phone calls** and **192 emails** requesting visitor information and/or a travel brochure, and received **1,040** requests for brochures via our website. We sent out an additional **288** brochures to DMOs, Chambers, AAAs, businesses, etc. A majority of our calls and email **inquiries came from the following states**: #1 California, #2 Washington, #3 Oregon, #4 Colorado, #5 Texas, #6/#7/#8 Arizona/Florida/Ohio tied, #9 Idaho, and #10 New York.

Chambers of Commerce & Visitor Information Services – We continued our **partnerships with the three Chambers of Commerce/Visitor Information Centers**. Each Chamber Director has a voting seat on our Board of Directors. SJIVB staff attend as many San Juan, Orcas and Lopez Chamber meetings/luncheons as possible throughout the year, although there was a pause on this due to COVID. Our phone system refers callers to each of the Chamber offices for Island-specific visitor information.

TOURISM INDICATORS FOR TRACKING & MEASURING RESULTS

The following statistics compare January-May* YOY, and reflect the impacts of COVID.

San Juan County & Town of Friday Harbor TRAVEL INDICATORS	2017 Collected Through May (probable month of business activity)	2018 Collected Through May (probable month of business activity)	2019 Collected Through May (probable month of business activity)	2020 Collected Through May (probable month of business activity)	% Change from 2019 to 2020 Through May (probable month of business activity)
County 2% Lodging Tax	\$253,250.00	\$274,005.00	\$309,030.00	\$151,757.00	-50%
County Sales Tax	\$2,178,246.00	\$2,237,376.00	\$2,460,953.00	\$2,231,768.00	-9%
Friday Harbor 2% Lodging Tax	\$70,088.92*	\$73,735.65*	\$71,690.11	\$30,727.72	-57%**
Friday Harbor Sales Tax	\$576,465.38	\$622,346.21	\$675,757.50	\$569,448.64	-15%**
Lopez Island “Special” Lodging Tax	\$20,230.00	\$15,747.00	\$21,079.00	\$15,074.00	-28%
Orcas Island “Special” Lodging Tax	\$135,609.00	\$153,627.00	\$177,847.00	\$92,196.00	-48%
San Juan Island “Special” Lodging Tax	\$97,375.00*	\$102,998.00*	\$110,104.00*	\$44,488.00	-59%

* There’s a two-month lag in receiving statistics back from the State, and so we only have them through May at this time

** Friday Harbor lodging and sales tax is collected separately from San Juan Island lodging and sales tax

[Washington State Ferries Ridership](#) – Ferry ridership was down due to COVID, so WSF stayed on their winter schedule.

Anacortes to:	January	February	March	April	May	June
	Total Riders	Total Riders	Total Riders	Total Riders	Total Riders	Total Riders
	% Change YOY	% Change YOY	% Change YOY	% Change YOY	% Change YOY	% Change YOY
Lopez Island	15,851	17,411	13,790	8,298	14,949	23,538
	-9.6%	25.9%	-33.8%	-65.2%	-48.9%	-27.4%
Orcas Island	32,379	36,188	26,098	12,228	23,538	42,013
	-6.3%	34%	-42%	-75.8%	-62.4%	-41.6%
San Juan Island	38,450	45,996	32,214	15,039	29,068	52,061
	-12.3%	37.3%	-42.5%	-76.2%	-64.6%	-47%

2020 BUDGET

The following budget reflects our original 2020 budget, **except for the loss of approximately \$85,000 in website advertising revenue**, which we've rebated to our members since March, due to our paused marketing strategies. This budget will likely continue to change based on seasonal advertising campaigns, media marketplaces, etc. which we've limited or eliminated this year, perhaps to be replaced by projects during the rest of the year which may be more appropriate due to COVID.

Revenue Sources:

County lodging tax contract	\$ 508,460.00 (65.5%)
Friday Harbor lodging tax contract	\$ 191,000.00 (24.5%)
Membership dues & additional listings	\$ 65,157.00 (8%)
Member website ads (<i>rebating March-Dec.; projected revenue was \$97,000</i>)	<u>\$ 11,922.00 (2%)</u>
Total	\$ 776,539.00 (100%)

Investments/Expenses:

Advertising, brochures, shows, research, visitor education, etc.	\$ 281,173.00 (36%)
Media relations (press trips, marketplaces, tracking, photography, etc.)	\$ 35,579.00 (4.5%)
Website (hosting, maintenance, SEO, new technology, etc.)	\$ 58,267.00 (7.5%)
Visitor services (phones & postage)	\$ 6,228.00 (1%)
Marketing personnel (payroll, taxes, benefits)(<i>all hours were cut in April</i>)	\$ 347,350.00 (45%)
Administration (rent, internet, insurance, bookkeeping, etc.)	<u>\$ 47,942.00 (6%)</u>
Total	\$ 776,539.00 (100%)

IN CONCLUSION

The **economic effects of COVID** hit the tourism industry especially hard, in San Juan County and around the world, with tourism businesses and organizations seeing unprecedented declines in revenue and statistics, leading to a trickle down effect on towns, counties, states and countries. At this time it's very unclear when San Juan County will move to Phase 3, and when we'll be able to proactively, officially welcome visitors back once again...

We look forward to the positive economic impact that our destination marketing and management strategies—paired with the three Chambers' visitor information services programs, and our members' individual marketing efforts—will bring to our Islands and our stewardship-minded tourism industry, hopefully in the second half of 2020 and into 2021.

We will continue to be mindful of the delicate balance between our environment, residents' quality of life, and our economy as we move forward with responsible tourism marketing and management strategies, determined in partnership with our members, Chambers of Commerce, and stakeholders on each Island. We will also continue to encourage the LTAC and County to hire a consultant to produce a **Tourism Management Plan**, which will include resident and stakeholder input.

We thank the San Juan County Council, Friday Harbor Town Council, County and Town Administrators, County and Town LTAC members, and our Board of Directors and members for their support and investment in destination marketing and management.

For further information or questions, please contact Deborah Hoskinson, Executive/Marketing Director, 378-3277 ext. 5, deborah@visitsanjuans.com, or Meaghan Felso, Board President, Innkeeper, Friday Harbor House, meaghan@fridayharborhouse.com.