

2022 ANNUAL REPORT

DESTINATION MARKETING
& MANAGEMENT

Photo by Mike Reid

To see the world is a gift. To love the world is a choice.
This is what travel teaches us.

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. All "compete" for visitors and their hard-earned dollars. 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. (We will receive 2022 data this spring.)

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 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 and quality of our natural and beautiful environment.



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 COMMUNITY ENGAGEMENT & VISITOR EDUCATION

- Communicate with potential visitors via phone, email, and our website; mail travel brochures 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 225+ local 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 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 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, year-round sustainability

VISITOR EXPERIENCE

Promote unique 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 STEWARDSHIP 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 last 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.



2022 TOURISM STATISTICS

Tourism is a top economic driver for our county. "New" tourism dollars circulate throughout our Island communities, and lodging tax -- collected from visitors -- helps fund many community assets. Below are visitation and tourism indicator statistics collected from Datafy, San Juan County, and Friday Harbor.

2022 Visitation to Lopez, Orcas & San Juan Islands



According to Datafy, there were 506,953 'unique visitors' to the 3 main islands in 2022. Many visitors make more than one trip which accounts for 1,698,430 'total trips.' Datafy tracks people who live 20+ miles from the San Juan Islands via cell phone and credit card usage.

2022 Tourism Indicator Statistics

Tourism Indicator Statistics	2018	2019	2020 (COVID)	2021	2022	% Change 2021 to 2022**
County Lodging Tax – "Special 2%" *	\$785,959	\$880,403	\$656,600	\$1,185,849	\$1,131,980	-4.54%
County Sales Tax*	\$4,550,397	\$5,018,226	\$4,885,199	\$6,428,748	\$7,089,068	+10.27%
Friday Harbor Lodging Tax – "Special 2%" *	\$243,647	\$241,942	\$141,516	\$295,221	\$310,813	+5.28%
Friday Harbor Sales Tax*	\$1,298,904	\$1,404,699	\$1,206,962	\$1,602,100	\$1,721,792	+7.47%
Lopez Island Lodging Tax	\$48,177	\$50,310	\$55,495	\$87,871	\$81,990	-6.69%
Orcas Island Lodging Tax	\$407,785	\$446,419	\$313,430	\$576,763	\$613,663	+6.39%
San Juan Island Lodging Tax*	\$328,364	\$383,678	\$263,020	\$487,214	\$436,327	-10.44%
WSF Anacortes to San Juans Total Riders	2,046,940	2,025,923	1,416,037	1,928,441	1,890,458	-1.97%
WSF Anacortes to Lopez Island Total Riders	323,532	317,329	240,298	300,109	295,460	-1.5%
WSF Anacortes to Orcas Island Total Riders	676,969	677,400	462,941	626,425	609,951	-2.6%
WSF Anacortes to FH/SJI Total Riders	904,886	896,384	604,405	876,244	869,851	-0.72%

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

2022 County lodging tax collections were down -4.5% compared to 2021 (a record-setting year due to pent up demand for travel), however, 2022 lodging tax increased +28.5% compared to 2019, the last "normal" year before Covid. Lodging tax is invested in marketing, Chamber visitor info centers, stewardship projects, museums, theatres/centers, parks, fair, events and film festivals, farmers markets, restrooms, and more.



SUPPORTING THE ECONOMY VIA DESTINATION MARKETING

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 media content. Funding from 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 print and online media outlets are the result of our media relations efforts or curious journalists — they are not paid ads.

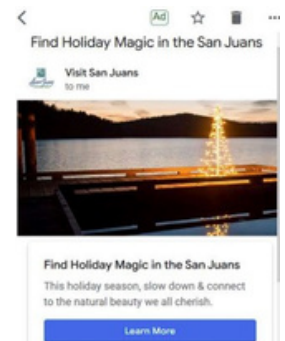
SEASONAL ADVERTISING CAMPAIGNS IN THE SEATTLE AREA

"PAID"

SEASONAL CAMPAIGNS:

- Winter Romance: January & February
- Spring & Spring Break: March - May
- Summer: June - August; *our July & August ads promote stewardship and Fall/Savor the San Juans*
- Fall/Savor the San Juans - September & October
- Holidays - November & December

Approx. 7,989,332 online advertising impressions in the Greater Seattle area



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 about the Islands.

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

\$7,755,489

MEDIA ADVERTISING
EQUIVALENCY VALUE

1.3 BILLION REACH

VIA CISION + PRINT & ONLINE
TRACKED TRAVEL ARTICLES

26

ASSISTED PRESS
TRIPS TO THE
ISLANDS

363

ISLANDS MENTIONS IN
PRINT & ONLINE
ARTICLES

Among the press trips we've helped host this year, four writers were on assignment for *Northwest Travel+Life*, *Seattle Refined*, and *Wanderlust*, respectively. Three articles have been published so far in *Seattle Refined*.



NOTABLE MEDIA FEATURING THE ISLANDS:

Seattle Met magazine, LonelyPlanet.com, The Seattle Times, Sunset.com, Travel+Leisure, The Washington Post, MSN Travel



PROTECTING THE 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 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

10,445 VISITS

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

1,339 VISITS

TO OUR
"SAN JUAN ISLANDS
PLEDGE" PAGE

234 SIGNATURES

ON OUR
SAN JUAN ISLANDS
PLEDGE

640 VISITS

TO OUR "ISLAND
KIDS EXPLAIN"
VIDEOS WEB PAGE

2,104 VISITS

TO OUR "VOLUNTEER
VACATION OPPORTUNITIES"
PAGE



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 very involved in the County's Sustainable Tourism Management Plan public process and action plan which began last spring.

Community Involvement

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

- Sustainable Tourism Management Plan Steering Committee (Deborah)
- Stewardship Network of the San Juans (Amy is Chair)
- SJIs Monument Advisory Committee (Amy)
- San Juan Island Chamber of Commerce Board (Deborah)
- Orcas Island Chamber of Commerce Board (Anna)
- San Juan County Ferry Advisory Committee (Deborah)
- Friends of Lime Kiln Society Volunteer (Amy)
- San Juan Community Theatre Volunteer (Annesa)

Community Relations

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

Marketing

- Our marketing is focused on spring, fall and winter visitation to help balance year-round economic vitality.

Participating in the Conversation

- Held "Tourism Talk" meetings via Zoom for residents, businesses & non-profits on the 3 main islands in February & March to listen to tourism concerns
- Listened to all 7 Sustainable Tourism Management Plan public Zoom meetings on the 3 main islands in April & May to listen to tourism concerns
- Partnered with Terrestrial Managers on educational practices around the treatment and protection of San Juan Island foxes to mitigate human-wildlife conflict

Supporting our Community

- Donated \$1,000 from our Membership fund to the Friday Harbor Fire Fund
- For the fifth 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
- Staff adopted Jackson Beach on San Juan Island 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

234 SIGNATURES ON THE PLEDGE PAGE AT YEAR END
1,339 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 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.*



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 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, conserve water, tread lightly, respect wildlife, etc. We also strive to make all potential visitors feel welcome via our IDEA initiatives.



TRIP PLANNING, INSPIRATION & EDUCATION



1.13 MILLION
WEB SESSIONS
-0.88% YOY
VISITSANJUANS.COM



18,204
E-NEWSLETTER
SUBSCRIBERS
-4.75% YOY

SOCIAL MEDIA ("OWNED")



24,427
FOLLOWERS
+6% YOY



11,865
FOLLOWERS
+18% YOY



5,064
FOLLOWERS
-1% YOY

ENGAGING WITH POTENTIAL VISITORS



773
PHONE
CALLS
-14% YOY



857
EMAILS
+31% YOY



7,076
BROCHURES
MAILED
-22% YOY

52,000
TOTAL
BROCHURES
PRINTED &
DISTRIBUTED
VIA RACKS, ETC.

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 2022 VISITORS FROM?

Top markets according to Datafy

1. Washington 76.1%
2. Oregon 6.1%
3. California 4.9%
4. Texas 1.6%
5. Idaho 1.5%
6. Arizona 1.4%
7. Colorado & Florida 1%



"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 others.

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

- Partnered with the Black Travel Alliance for a fall FAM ("familiarization") tour with BIPOC writers/influencers
- Attended Wavelength, a media marketplace hosted by the Black Travel Alliance, to connect with other BIPOC content creators



"IDEA" ON OUR WEBSITE

- Applied for a State of Washington Tourism grant to collaborate with the non-profit Disabled Hikers to create an Accessible Trail Guide for the San Juans in spring of 2023 to post to our website
- Created an itinerary focused on Coast Salish heritage and culture
- Created a "first-time visitors" video which featured an LGBTQ+ couple



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 (retired mid year)

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

Communications & Stewardship Manager

ANNESA KNOWLES

Visitor & Member Services Manager

ANNA ERICKSON

Digital Marketing & Outreach Manager
(Joined the SJIVB May 2)

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, 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



227
MEMBERS
ON MAIN 3
ISLANDS



21
NEW MEMBERS



46
MEMBER
NEWSLETTERS
& ACTION ITEMS



Staff at American Camp

IN CONCLUSION...

Although some 2022 tourism statistics were down compared to 2021, it's important to remember that 2021 was a record-setting year due to pent-up demand for travel following Covid. 2022 County and Town of Friday Harbor statistics look robust when compared to 2019, the last "normal" year prior to Covid.

Trends show there's still plenty of demand for travel, and people are still searching for beautiful, "outdoorsy" destinations. We'll have to wait and see if/how a possible recession affects 2023.

We will continue to be thoughtful with our marketing and stewardship messaging, and we will continue to participate in, and be advocates for, the Sustainable Tourism Management Plan process, which will help guide our work into the future. We're already working on our list of action items. This plan will help balance the quality of the Islands' vital and vibrant visitor economy with the quality of residents' lives, our environment, and our visitors' Island experiences.

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