



2023 SEMI-ANNUAL REPORT

DESTINATION MARKETING &
MANAGEMENT, JANUARY-JUNE

Photo by Kathleen Ballard

"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 an 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.

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 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 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
- Work with media to tell authentic Island stories
- Target our marketing to attract mindful visitors

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 225+ 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.

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 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 is spearheading this project, and our Executive Director and a Board member sit on the Steering Committee. This plan will help shape the future of tourism in a meaningful way which reflects community values. The draft plan will soon be published for public comment. We have already been working on assigned actions to move this important plan forward.



JANUARY-JUNE 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.

January-June Visitation to Lopez, Orcas & San Juan Islands

This graph makes comparisons back to 2018; July 2023 stats, in red, have not been fully collected

Visit San Juan Islands - Custom Report

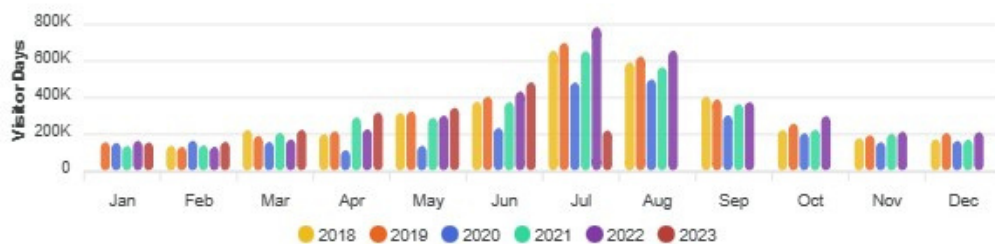
Filters: In-State Out-of-State Distance: 20 mi - 2,806 mi Dates: 2/1/2018 - 7/8/2023

Title

Clusters: All included POIs: All included

Monthly Volume by Visitor Days

All Main Dates vs Compare Dates



| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 2018 | 0 | 138.4K | 225.2K | 201.4K | 317.1K | 379.2K | 657.7K | 594.3K | 407.4K | 224.0K | 179.5K | 173.5K |
| 2019 | 157.7K | 132.1K | 191.5K | 216.7K | 325.6K | 406.2K | 700.3K | 625.7K | 391.0K | 259.3K | 195.5K | 207.6K |
| 2020 | 153.6K | 165.6K | 159.1K | 113.4K | 138.0K | 235.3K | 484.1K | 500.6K | 304.1K | 206.6K | 158.2K | 164.9K |
| 2021 | 137.1K | 141.0K | 208.5K | 293.3K | 290.7K | 376.9K | 654.9K | 567.5K | 365.4K | 225.4K | 203.2K | 171.3K |
| 2022 | 165.1K | 132.2K | 172.8K | 228.8K | 303.6K | 434.6K | 786.8K | 657.6K | 377.0K | 300.5K | 214.6K | 212.0K |
| 2023 | 156.0K | 159.6K | 225.4K | 319.4K | 345.7K | 485.4K | 221.5K | 0 | 0 | 0 | 0 | 0 |

Visitor Days by Length of Stay



| | | | |
|----------|-------|---------|-------|
| Day Trip | 37.6% | 2 Days | 13.3% |
| 3 Days | 13.1% | 4 Days | 10.5% |
| 5 Days | 7.8% | 6+ Days | 17.7% |

Custom notes

Caladon Model | © Datafy - All Rights Reserved

These estimates are generated from a statistical model which has been trained using historical behavior. The specific results are based on an observed sample of devices that met the specified filter settings.

DATAFY

Datafy tracks people who live 20+ miles from the San Juan Islands via cell phone and credit card use.

January-June Visitor Demographics

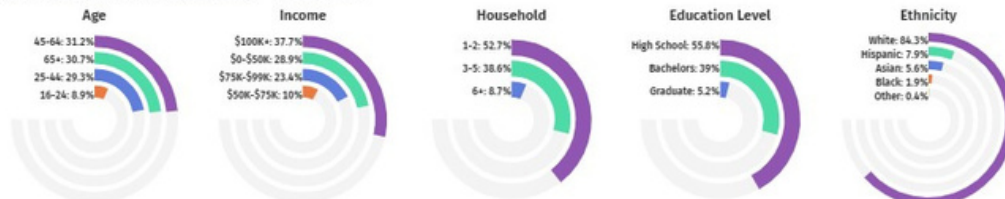
Visit San Juan Islands - Custom Report

Filters: In-State Out-of-State Distance: 20 mi - 2,806 mi Main Dates: 1/1/23 - 6/30/23

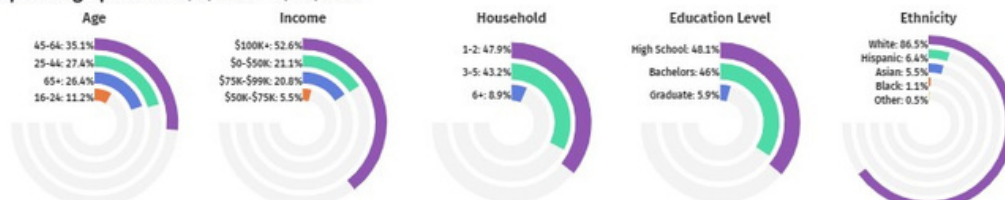
Title

Compare Dates: 1/1/22 - 6/30/22 Clusters: All included POIs: All included

Top Demographics for 1/1/2023 - 6/30/2023



Top Demographics for 1/1/2022 - 6/30/2022



Caladon Model | © Datafy - All Rights Reserved

These estimates are generated from a statistical model which has been trained using historical behavior. The specific results are based on an observed sample of devices that met the specified filter settings.

DATAFY



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. County and Town of Friday Harbor lodging tax collections fund advertising campaigns that target our main feeder market—the Greater Seattle area. Media relations and social media efforts help us reach beyond Seattle.

SEASONAL ADVERTISING CAMPAIGNS

"PAID"

EXAMPLES OF OUR WINTER ROMANCE & SPRING ADS



Approx. 3,355,675 online advertising impressions in the Greater Seattle area

Sip Magazine 2-page spread advertorial partnership

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 media coverage, nor can we control what a given outlet may print about the Islands.

\$1.7 MILLION

MEDIA ADVERTISING
EQUIVALENCY VALUE

870 MILLION REACH

VIA CISION + PRINT & ONLINE
TRACKED TRAVEL ARTICLES

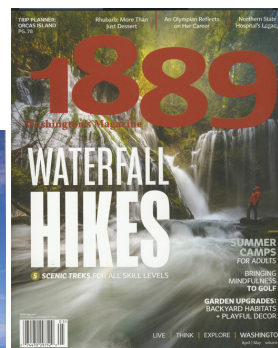
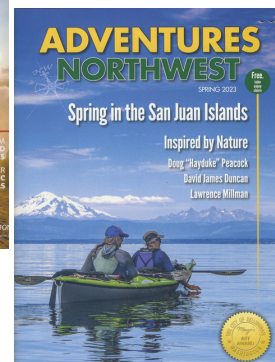
11

ASSISTED PRESS
TRIPS TO THE
ISLANDS

181

ISLANDS MENTIONS IN
PRINT & ONLINE
ARTICLES

Among the press trips we've helped host this year, three writers were on assignment for *TravelAwaits*, *Seattle Refined*, and *Departures*. Six articles have been published so far in *Seattle Refined* and *Travel Awaits*.



NOTABLE MEDIA FEATURING THE ISLANDS:

TravelAwaits.com, LonelyPlanet.com, The Seattle Times, Forbes.com, Travel+Leisure.com, Northwest Travel+Life, MSN Travel



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



Set Your Mind to Island Time

Join us in enjoying and protecting the islands we love

Let us acknowledge that we reside on the ancestral lands and waters of the Coast Salish people who have called this place home since time immemorial and let us honor inherent, aboriginal, and treaty rights that have been passed down from generation to generation.

Things change when you're on island time. Priorities re-sort. We value a slow pace here, and invite you to "Love It Like a Local" - treating the San Juans with the same care and respect as you would your own backyard. It's an environment we all cherish and want to protect, and we encourage you to embrace island time while caring for one another and nature itself.

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."



Protect the Foxes



Respect Wildlife



Support the Orcas

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.

BY THE NUMBERS

18,958 VISITS

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

679 VISITS

TO OUR
"SAN JUAN ISLANDS
PLEDGE" PAGE

264 SIGNATURES

ON OUR
SAN JUAN ISLANDS
PLEDGE

526 VISITS

TO OUR "LEAVE NO
TRACE" WEB PAGE

1,228 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 Destination Management Plan public process and action plan which began in Spring 2022, noted on page 3.

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)
- 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)
- SJIs WSF Schedule Update Task Force (Deborah)
- Friends of Lime Kiln Society Volunteer (Amy)
- San Juan Community Theatre Volunteer (Annesa)

Community Relations

- Published two articles (of a four-part series) in all three of Sound Publishing's newspapers detailing the various aspects of Visitors Bureau marketing and management
- Contributed an article to Sound Publishing's SpringTide booklet 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

264 SIGNATURES ON OUR PLEDGE PAGE AS OF JUNE 30
679 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 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



613,907

WEB SESSIONS
+6% YOY
VISITSANJUANS.COM



19,597

E-NEWSLETTER
SUBSCRIBERS
+7.65% SINCE DEC.

SOCIAL MEDIA ("OWNED")



24,522
FOLLOWERS
+0.4% SINCE DEC.



12,446
FOLLOWERS
+5% SINCE DEC.



5,033
FOLLOWERS
-0.6% SINCE DEC.

ENGAGING WITH POTENTIAL VISITORS



364
PHONE
CALLS
-16% YOY*



418
EMAILS
-20% YOY*



4,983
BROCHURES
MAILED
+27% YOY

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

WHERE WERE OUR JANUARY-JUNE VISITORS FROM?

Top markets according to Datafy

1. Washington 75%
2. Oregon 5%
3. California 4.5%
4. Texas 2%
5. Idaho 1.5%
6. Florida 1.3%
7. Arizona 1.3%
8. Colorado 1%



"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 two content creators in April to create social and blog content focused on Black outdoor adventure and accessible family travel; *Note: content will be posted in August to promote travel in the shoulder seasons.*
- A third creator, Traveling While Black, is scheduled for September



"IDEA" ON OUR WEBSITE

- Collaborated with non-profit Disabled Hikers to create an Accessible Trail Guide for the San Juans in April. The final guide will be posted to our website in August.
- Created an outdoor activities "how to visit" video which featured an Asian couple

1,709 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 & Marketing 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, 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



229
MEMBERS
ON 3 MAIN
ISLANDS



15
NEW MEMBERS

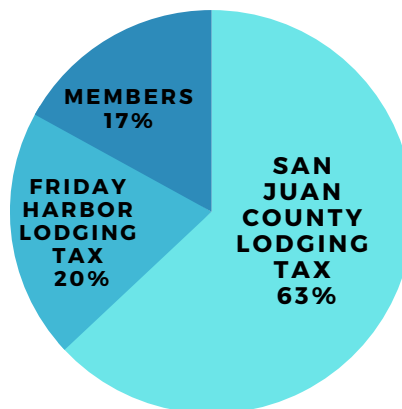


23
MEMBER
NEWSLETTERS
& ACTION ITEMS



OUR FUNDING MIX

Our annual County and Friday Harbor lodging tax funding is based on the previous years' collections. Our 2023 County funding is 26% of total 2022 collections, while up to 74% was granted to community assets related to tourism 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 funding is 30% of 2022 collections, while up to 70% was allocated for tourism grants. We supplement our annual County/Town 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, and will continue to participate in, and be advocates for, the Destination Management Plan process, which will guide our work into the future. *Balance is the key, so that these beautiful Islands can be enjoyed by residents, wildlife, and visitors for generations to come.*