



2018 Semi-Annual Destination Marketing Report

"One's destination is never a place but rather a new way of looking at things." -Henry Miller

Tourism, when responsible and sustainable, is an important economic development strategy for small, rural towns and counties, as well as big cities. 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. The latest research by Dean Runyan Associates, released each spring, reveals that visitors spent over **\$232 million in our county in 2017**. Visitors "import" new dollars into our economy, which benefit businesses and residents as these dollars circulate, and trickle down, throughout our Island communities. Tourism creates business opportunities and jobs. Tourism off-sets Islanders' tax burdens when visitors pay local sales tax. Tourism improves residents' quality of life by "subsidizing" a variety of restaurants and shops. 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" is the key to our Islands' successful tourism economy. Tourism is big business for most towns, cities, counties, states and countries, and all compete for visitor dollars. One magazine article, online or print ad, social media post, or wedding show display can result in couples visiting for romantic weekends, families staying for an entire week, or brides and grooms inviting hundreds of guests to spend a couple of nights and thousands of dollars locally.

Below you'll find our destination marketing highlights for January-June 2018.

Numbers at a Glance

304 members on all four islands

8% increase in County lodging tax and 2.7% increase in sales tax through May

5% increase in Friday Harbor lodging tax and 7.95% increase in sales tax through May

610,523 web sessions, up 5.47%, and 2,370,915 pageviews, up 0.21%

Over 23,800,000 advertising impressions in print, online, radio and TV

Conservative 298,000,000 reach via 384+ print & online tracked travel articles

Media advertising equivalency value of \$2,700,000

40 journalists & photographers hosted on 24 press trips; 44+ requests fulfilled for photos & b-roll

15,437 Facebook "likes" and 4,723 Twitter followers

2,268 Instagram followers and 17,937 E-newsletter subscribers

Approx. 619 phone calls, 433 emails, and 1,683 website requests for visitor information and/or brochures

50,000 travel brochures printed; approx. 400 wedding brochures distributed to date

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, 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, have evolved into a DMMO—destination marketing and management organization—as we focus more keenly on sustainable, responsible tourism, and "product development" including agritourism, arts, cultural and heritage tourism.

Our Mission – See first paragraph.

Our Goals – To help strengthen San Juan County's year-round economy; to foster an appreciation of San Juan County's maritime and rural ways of life, as well as its history, arts and culture; to communicate San Juan County's environmental stewardship messages to visitors; and to enhance visitors' travel experiences county wide.

Membership – We gained **15 new members** for a **total of 304** on all four, ferry-served islands and the mainland. We held our **Annual Spring Membership Luncheon** on Orcas Island May 10. We coordinated **“Off the Charts Guest Experiences”** workshops in April on three islands featuring local expert and member Scott Hale of Island Inn at 123 West and LeanTo Glamping. A staff representative made it a priority to visit Orcas and Lopez Islands at least once a month to visit with members and potential members, and to attend Chamber of Commerce meetings when possible.



The first issue of our new member e-newsletter called **INFOcus** went out in early summer via Constant Contact, and another will go out in August. The purpose is to keep members informed of what is happening locally in the tourism industry. This e-newsletter is in addition to emails alerting members to marketing opportunities regarding seasonal campaigns, workshops, membership luncheons, legislative alerts, etc.

Board of Directors – Our Board represented community leaders on Lopez, Orcas and San Juan Islands and included: President - **Carl Silvernail***, Otters Pond B&B; Vice-President - **Meaghan McCormick**, Friday Harbor House, San Juan Island; Treasurer - **Anna Maria de Freitas***, Harrison House/Tucker House/Coho Restaurant; Secretary - **Lydia Miller**, Pebble Cove Farm, Orcas Island; Lopez Chamber Rep - **Christa Campbell***; Orcas Chamber Rep - **Lance Evans**; San Juan Chamber Rep - **Becki Day**; County LTAC Rep - **Laura Saccio***, Earthbox Inn & Spa/Bird Rock Hotel; **Anthony Rovente**, The Edenwild Boutique Inn, Lopez Island; **Kimaya Maitreya***, Cloud Nine Events, Orcas Island; **Holly Southern***, Rosario Resort, Orcas Island; Appointed Agritourism Rep - **Stephen Robins***, Pelindaba Lavender; Appointed SJC Economic Development Council Rep - **Victoria Compton**; Appointed Transportation Rep - **Kraig Hansen**, SJ Transit; and Appointed Outdoor Activities Rep - **Sally Thomsen**, San Juan Kayak Expeditions. (*Also on Board Marketing Committee)

Staff, Professional Development & Consultants – Marketing staff included **Deborah Hopkins Buchanan**, Executive/Marketing Director; **Barbara Marrett**, Communications/Film Liaison/Stewardship Manager; **Carole Sue Conran**, Visitor/Membership Services Manager; **Shannon Borg**, Marketing Content/Outreach Coordinator, and **Amy Nesler**, Communications/Stewardship Coordinator. We contracted with **Meaghan Rader** of Rader Bookkeeping for approximately 7 hours per week. In order to continue to be innovative and nimble in the ever-changing world of travel and destination marketing, staff attended the annual DMA West (Destination Marketing Assn. of the West) **Tourism Tech Summit**, as well as educational seminars presented by **Public Relations Society of America**, **Society of Travel Writers**, **International Food, Wine & Travel Writers Assn.** and **North American Travel Journalists Assn.** We also attended Visit Seattle's **Global Tourism Summit**, and their **Cruise Connections '18** in partnership with the Port of Seattle. We continued to work with expert consultants **The Communications Group** and **No. 10 Web Company**, both in Seattle, as noted below.

DESTINATION MARKETING HIGHLIGHTS

We implemented the following destination marketing strategies to create awareness of the San Juan Islands brand, primarily targeting the **greater Seattle leisure travel market**, in order to put “heads in beds” and “feet on the streets.”

Brand Positioning Statement – “For Adults 25-64, the SJIVB helps me imagine and plan a getaway for me and my family and friends that will reconnect us 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.”

Website – All of our marketing strategies drive consumers to our website, www.VisitSanJuans.com, our #1 marketing tool. We continued to contract with **No. 10 Web Company** to upgrade our website with new trends and technology. We also continuously updated it in-house with new content – new information, experiences, itineraries, photos, etc. We added a new **blog/Island Stories** section (www.visitsanjuans.com/blog), the **four seasons** to our home page (to help entice people here during spring, fall and winter), and continued to use a new social media tool, **CrowdRiff**, which allows us to post great Instagram images of the Islands to the photo gallery on our home page.

- According to **Google Analytics**, our January-June 2018 **web ‘sessions’ were up 5.47%** (610,523 vs. 578,847) year-over-year (YOY). Pageviews were at 2,370,915, up 0.21% YOY.
- 71% of our users are **new** and 29% are **returning users**. Females account for 61%, males for 39%.
- **Age groups** who viewed our website were as follows: 18-24 = 8%, 25-34 = 28.5%, 35-44 = 21.5%, 45-54 = 16.5%, 55-64 = 16%, and 65+ = 9.5%.
- **Technology** used to view our website included: desktop 47.6%, mobile 42.3%, and tablet 10.1%.
- Viewers were from the following **locations**: U.S. 93% (WA 41.6%, CA 11.3%, OR 6.5%, TX 5.4%, NY 2.6%), Canada 3% (BC 71%), and UK 1%.

Social Media – We focused on these top three social media platforms: **Facebook**, **Twitter** and **Instagram**. While our numbers are still relatively small, it's important to note that we've increased impressions and engagement. The more engagement, the further the reach and impact of our social campaigns, and the higher we rank in social media feeds. We also incorporated more social media "influencers" into our media relations strategies to appeal to this demographic. See www.facebook.com/VisitSanJuans, <https://twitter.com/visitSJIslands> and www.instagram.com/visitsanjuans.



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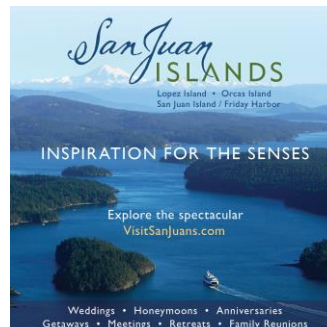
E-Newsletter – Our monthly consumer **E-newsletter** has 17,937 subscribers, up +51% YOY, as a result of incorporating a sign-up box on our home page last June. It has an excellent average open rate of 26%.

Travel Brochure – We continued to partner with the **three Chambers of Commerce** to produce a "family" of 2018 brochures which look similar in branding. We published 50,000 updated copies which included the seven principles of **Leave No Trace**; the SJIs **Scenic Byway** or driving tour maps of the three main Islands; maps of Friday Harbor, Eastsound and Lopez Village; descriptions and photos for each Island; "getting here" information, and SJIVB and Chambers contact info. Brochures were sent out as fulfillment for visitor information requests to our office via phone, email and website; in media kits; at wedding and foodie shows; and were distributed by Certified Folder Display Services in approximately 550 locations in NW Washington, on all Washington State Ferries, and at the Sidney B.C. terminal.



Regional Travel Guides – We placed ads in key, regional, 'portal' travel guides, and their corresponding websites: (1) the **Seattle Visitors Guide** (350,000 readership, winter/spring) and www.VisitSeattle.org, and (2) the **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).

Advertising Campaigns – Thanks to a lodging tax grant from Friday Harbor, which supplements our County contract, we continued to retain The Communications Group to create and manage seasonal advertising campaigns targeted to the greater-Seattle area, highlighting **Winter Romance**, **Spring**, and **Summer**, including our new "**Voices of the Islands**" campaign. These mixed media campaigns were placed in print, online, radio and TV garnering over 23,800,000 ad impressions. A picture is worth a thousand words – below are samples of our 2018 ads to date, and our TV ads can be found on our YouTube channel at www.youtube.com/user/visitSJIslands under "Videos." (Detailed reports are available.)



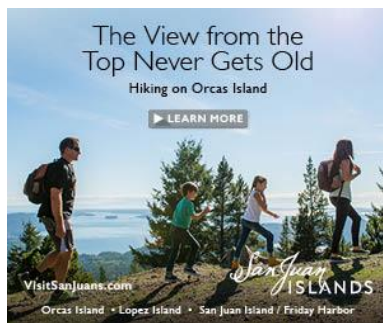
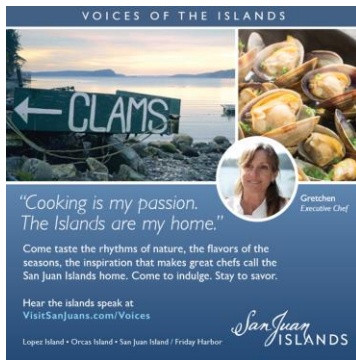


Photo Shoots – We coordinated spring photo shoots to capture photos for future advertising campaigns, social media, our website, etc. We took photos on **Lopez Island** (activities and dining) and **Orcas Island** (meetings, retreats and team building). The Communications Group coordinated with staff and contracted with two members to accomplish this: Robert S. Harrison Photography (Lopez) and Kimaya of Cloud 9 Events (Orcas).

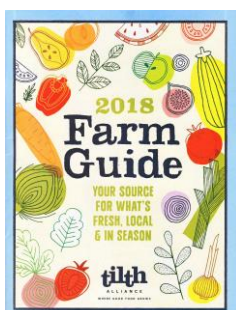
Videos – Short videos are a top trend in destination marketing. As a result, we continued to work with Orcas Island's Rock Island Media to produce a new **winter romance video** (scroll to the bottom www.VisitSanJuans.com/Videos), as well as a series of **"Voices of the Islands" videos**, promoted in our 2018 ad campaigns, which can be found at www.VisitSanJuans.com/Voices.

Destination Weddings – Destination weddings, honeymoons and anniversaries are big business for the Islands – one bride and groom can invite hundreds of guests here.

- We distributed approximately 400 of our six-page destination wedding brochures at the annual **Seattle** and **Portland wedding shows** January 13-14, and to brides-to-be who called our office. In addition, we partnered with The Journal, Sounder and Weekly to distribute a 24-page wedding resource guide at both shows. As a follow up to the shows, we emailed a special edition e-newsletter to brides who provided their emails.
- We placed a full-page advertorial in Seattle's top wedding guide, the **B&E Wedding Guide**.

Agritourism & Culinary Travel

- We exhibited at **"Taste Washington"** in March (230 wineries, 65 restaurants, 8,000 attendees) to promote **Island Grown** and **Island Made** products, **Savor the San Juans**, and our growing farms and food scene.
- An Orcas Island graphic designer created our full-page map/advertisement in the **2018 Tilth Alliance Farm Guide** state-wide directory, titled "Explore the Farms & Food of the San Juan Islands," which featured 57 Island farms, restaurants and artisan producers. The guides are available at nearly 500 locations throughout the state; see page 29 at http://www.pugetsoundfresh.org/sites/default/files/farm_guide/FarmGuide18-FINAL.pdf. The San Juans were also included on the app, www.pugetsoundfresh.org/freshapp.



Heritage Tourism – For the seventh year, we partnered with reps from the Town of Friday Harbor; the Orcas, Lopez and San Juan Historical Museums; and the San Juan Island National Historical Park to help market National Historic Preservation Month in May as “**History Lives Here: Heritage Month in the San Juan Islands.**” It was promoted via a press release to regional media, social media and on our website’s home page and history itinerary web pages, www.visitsanjuans.com/history-lives-here.

Regional & International Travel Trade & Special Projects – Research shows that international visitors stay longer and spend more money. As a result, we take advantage of many low-cost marketing opportunities offered by Visit Seattle, the Port of Seattle and the Washington Tourism Alliance (WTA).

- **UK Lonely Planet & Norwegian Airlines Getaway Promotion** – The Port of Seattle asked us to provide a getaway prize for this prestigious promotional contest. We partnered with members on Orcas Island (Rosario Resort and Deer Harbor Charters), and the winners enjoyed their prize in early April.
- **UK Virgin Atlantic Airlines & Virgin Holidays Video “Destination Guide”** – The Port of Seattle invited us to be featured in a video “destination guide” promoting Seattle, Woodinville and the San Juans. We coordinated interviews and activities for the three-person film crew to shoot on San Juan Island in early June as part of the 15-20 minute video which will be shown on Virgin Atlantic’s in-flight entertainment system and in their departure lounges. It will also be used for online promotional campaigns via their in-house tour operator Virgin Holidays. In 2016, Virgin Atlantic flew just over five million passengers to destinations around the world; this new video will be available on-demand on ALL Virgin Atlantic aircraft.
- **UK Trailfinders & Norwegian Airlines FAM Tour** – The Port of Seattle asked us to host nine reps from this top travel company in the UK and Ireland. They have a staff of over 1,000 in 32 travel centers, and have made travel arrangements for over 15 million clients since 1970. They enjoyed Seattle, Mt. Rainier National Park, Woodinville and San Juan Island on their June FAM (familiarization) tour. They arrived in Friday Harbor on June 26 via the San Juan Clipper (after enjoying a whale watch tour), enjoyed lunch at Downriggers and an hour of free time in town.
- **SeaTac Spotlight Program** – DMMOs from around the state were invited to apply for highly-reduced advertising space at SeaTac via a lottery system. We were picked #11 of 24 spots available. This enabled us to secure Alaska Airlines’ North Satellite Terminal for our 62”w x 43”h diorama. It serves 18% of SeaTac’s customers, approximately 561,994 domestic and 11,608 international visitors, for a total of 573,602, their second largest terminal.
- **Seattle’s Columbia Tower Sky View Observatory** – The Sky View Observatory marketing team offered the Islands a complimentary spot in their new trip planner digital experience on the 73rd floor. The Columbia Tower is the tallest building in Seattle, and people pay to see the spectacular view. We submitted photos and copy for their app, placed on stationary tablets around the perimeter of the Observatory. The overall goal is to give their visitors a jumping off point to discover different landmarks in and around the Seattle area.
- **NorthStar Air Tours** – We’ve been working with NorthStar for several years, helping to get them in the air despite all the red tape. They finally began air service between Friday Harbor and Eastsound to Victoria International Airport in May. We’ve partnered with them on two promotions to date: 1) they flew a small contingent of San Juan and Orcas Island reps to Victoria for sales calls and the Victoria Guest Services Tourism Showcase on May 14, and 2) they flew Victoria concierges to San Juan Island for a FAM tour on June 13. We will continue to partner with them to promote this convenient and affordable service.



Northstar Air Tours sales team in Victoria



UK Virgin Atlantic Airlines film crew



Tourism Master Plan – In late December we met with Councilman Rick Hughes and Erika Shook, Director, SJC Department of Community Development. **The Tourism Master Plan (TMP) was officially handed off** to Ms. Shook – the County’s planning expert. The TMP Steering Committee is standing by, ready to meet and/or assist as needed. It was recommended that a tourism industry consultant be hired, and a list of suggestions was shared. We recently began talking with Councilmen Hughes and Watson about creating an RFP to keep the process moving.

Scenic Byway – We continued to promote the SJIs Scenic Byway by denoting it on the map in our annually printed brochure, on our website, via WSDOT’s scenic byway web page, and in the 100-page **Scenic Washington State 365 Scenic Drives & Road Trips Guide**. Local shopkeepers on Orcas and San Juan also continued to promote it via merchandise.

Meetings & Retreats – As mentioned earlier, we photographed **meetings/retreats venues** and **team building activities** on Orcas Island this spring. We ran winter and spring campaigns online and in print in several Pacific Northwest meeting guides and magazines using the ads below. Our webpages can be found at these links: www.visitsanjuans.com/meetings, www.visitsanjuans.com/meetings-venues-summary and www.visitsanjuans.com/meetings-venues.



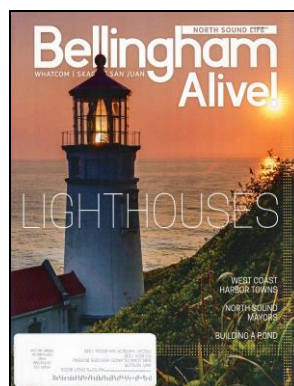
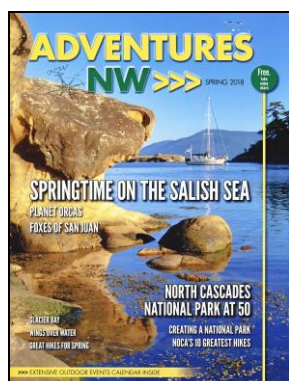
Media Relations – The San Juan Islands are one of the few destinations in the state that has a **dedicated media relations staff**, an important reason why the Islands consistently enjoy excellent media coverage. Media Blitzes (when we travel to meet with top travel editors), media marketplaces, a comprehensive media page on our website, and hosting journalists on press trips are a few of the ways **we proactively engage media in order to “earn” media coverage**.

Press Trips – In our continuing efforts to court top publications and influential journalists, we hosted or assisted **40 journalists**, influencers and photographers on **24 press trips**. Among the publications represented were United Airlines’ *Hemisphere’s* magazine; Aer Lingus’ magazine, *Cara*; *NW Travel & Life*; *Sunset*; *The Irish Times*; *The Daily Mirror*, *OnTrak* magazine, *1889* magazine, and *Sip Northwest*. **In-kind contributions towards press trips was approximately \$12,370.**

Media Marketplaces, Conferences & Sales Missions – Funded by our Friday Harbor lodging tax grant, as well as our County and membership budgets, we attended four, key media marketplaces/conferences, to meet with travel media/editors, and learn tips and trends, which included the **North American Travel Journalists Association (NATJA)** annual meeting, **Public Relations Society of America (PRSA)** Game Changers conference, **PRSA Travel & Tourism Section** annual meeting, and **International Food, Wine & Travel Writers Assn. (IFWTWA)** annual meeting. We pitched story ideas to approximately **80 writers, editors and television producers**. Publications represented included *AP Travel*, *Conde Nast Traveler*, *Northwest Travel & Life*, *Private Clubs* magazine, *Seattle* magazine, *AAA Midwest Travel*, *Midwest Living*, *Travel + Leisure*, *San Francisco Chronicle*, and *National Geographic Traveler*.

Port of Seattle Grant – We applied for and received a **grant from the Port of Seattle** totaling \$9,250. Seven thousand dollars are earmarked to expand press trips for media from outside the Pacific Northwest; \$2,250 is earmarked to attend the Travel Media Showcase Family Travel Assn. conference, since this is one of our strongest niches.

Print Media Coverage – We tracked coverage of the Islands in over **384 print and online articles**. Our biggest print reaches came from *The New York Times* Sunday Travel Section (1.7m), *Los Angeles Times* (14m), and *The Seattle Times* (10m). (m=million). Cover stories included:



Online Coverage – The **largest online travel-related media reach** came from the following: USAToday.com (53m), BusinessInsider.com (35m), Forbes.com (38m), TripAdvisor.com (35m), and NationalGeographic.com (19m). The new “Whale Warning Flag” received significant coverage in U.S. News & World Report (www.usnews.com) (15m). Many of these articles also appeared in print editions, however, our media tracking service (Meltwater) only tracks online articles, and we may not always see the print edition. According to Meltwater, the online reach for January-June was **297 million**.

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 included these high-reach “best” lists to date (ranked by reach):

“27 Underrated U.S. Destinations Everyone Should Visit in Their Lifetime,” BusinessInsider.com
“15 Incredible Whale Watching Trips in the USA,” www.tripadvisor.com/VacationRentalsBlog
“10 Great Places to Explore Along the Canadian Border,” USAToday.com
“7 Thrilling Border-Crossing Adventures Around the Globe,” NationalGeographic.com
“The 5 Best Whale Watching Spots in Washington,” TheCultureTrip.com
“6 Iconic Northwest Experiences to Look Ahead to as Winter Ends,” www.seattletimes.com
“America’s Best Island Vacations,” Jetsetter.com
“Best New Chef, Jay Blackinton’s Path from Veganism to Game Hunting,” www.foodandwine.com

Follow links to these stories on the Meltwater media tracking spread sheet attached to this report. For top stories see www.visitsanjuans.com/san-juan-islands-news. We continue to enjoy significant coverage as an emerging foodie destination. Coverage of Southern Resident killer whales, glamping (“glamorous” camping), kayaking, hiking, biking and the Islands as both a romantic and family travel destination, continues.

Meltwater Pulse Report – We contracted with this media tracking service to create a semi-annual and annual report utilizing data from travel articles and social media tracked throughout the year. This helps measure the effectiveness of our communications strategies, and see which topics received the most traction, when and where. ***A copy of this document is attached to this report.***

Television, Film Industry & Video Production – We are the State’s official **film liaison for San Juan County** and work closely with Washington Film Works to respond to leads through its office, as well as our own leads. Film, TV show producers and catalog shoots included Island Life (HGTV), Cutter & Buck catalog shoot, and a spotlight on the Fourth of July with British actor Martin Clunes for Britain’s ITV channel. There was no charge to the Visitors Bureau for these priceless promotions and crews lodged in the islands spent money at local businesses.

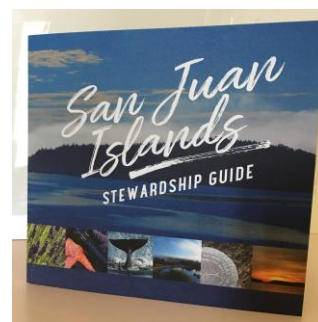
All-Island Storylines Brochure for Media – Our new, four-page **storylines brochure**, designed and printed in 2017, was a finalist in the 2018 NATJA Travel Media Awards Competition for Visitor’s Guides. It can be found on our media webpage at <http://bit.ly/2Dlj2u9>.

Photos & B-roll – We are often asked to provide photos for upcoming books, articles and promotional materials, or b-roll (video clips) for films and television, all of which bring new business to the Islands. We fulfilled over **44 requests** for photos and b-roll.

International Media – Our privileged **partnerships with Visit Seattle and the Port of Seattle** give us access to an outstanding international media market. We worked with the Port of Seattle to bring 8 media reps from Ireland, Scotland and Great Britain’s top newspapers and travel magazines as part of a promotion of Aer Lingus’ new direct flights from Seattle to Dublin. In addition, Visit Seattle sent Mari Compos, a Brazilian journalist specializing in travel for top Spanish language magazines, on a press trip for Brand USA.

Media Leads – With the support of Island businesses and organizations, **we responded to and/or shared 32** significant media leads with our members, generated from our marketing efforts, as well as efforts by the Port of Seattle and Visit Seattle. This is an important tool to stay top of mind, without the expense of hosting media. By proactively responding to quick-turn-around media leads we were included on many “top” or “best” lists.

Stewardship & Visitor Education – **Our economy depends on our beautiful environment.** The SJIVB works hard to balance vibrant economic development with stewardship ethics. We carefully monitor the wording of articles mentioning wildlife viewing and interaction, and make suggestions or corrections before (when possible) or after the article is published. The **seven local principles of Leave No Trace (LNT)** are on our website and brochure, linking to www.VisitSanJuans.com/leave-no-trace. A Sustainable San Juans landing page, www.visitsanjuans.com/about-islands/first-time-visitors-guide/sustainable-



san-juans, promotes stewardship messaging with links to our webpages encouraging responsible wildlife watching, ways to travel green, Leave No Trace, and voluntourism. We also write letters to our state legislature supporting bills that will protect our environment such as SB 6269 strengthening oil transportation safety.

We assisted SJC Public Works, in collaboration with the Stewardship Network and Terrestrial Managers Group, with producing and distributing their new **San Juan Islands Stewardship Guide** funded by lodging tax. The primary goal of this project was to provide a visitor orientation, including information on reducing, reusing, and recycling wastes; boating and whale watching best practices; water conservation; air and noise quality; and alternative transportation. Guests are “encouraged to act” in partnership with the community to preserve this unique and special place. These guides have been placed in lodging rooms throughout the County.

Community/Islands Relations

- **Tourism impacts many Islands’ organizations’ missions**, and as a result we are members of several committees including the Stewardship Network of SJC, Salish Sea Association of Marine Naturalists, SJIs Monument Advisory Committee, Leave No Trace Committee, SJI Trails Committee, Island Grown Committee, and SJC Agricultural Network. We’ve also been working closely with the Terrestrial Managers, providing information to their Visitor Study consultants and attending their February stakeholders workshop and other meetings.
- We’ve recently contracted with former SJIVB Communications/Stewardship Manager Robin Jacobson to write articles informing our community about our DMMO economic development work.
- For the first time, we offered \$1,000 **scholarships**, at all three public high schools, to seniors **pursuing degrees in tourism/hospitality** or a related degree. This year we awarded two scholarships and plan to widen the scope next year to also include seniors pursuing degrees in marketing/communications/public relations.

Government/WA State Ferries Relations

- In January we participated in the “**2018 Washington Tourism Rally**” in Olympia, meeting with state-wide tourism partners, attending hearings and lobbying legislators for support of a tourism-funding bill – which finally passed.
- We continued to represent Tourism and the Scenic Byway on the **SJC Ferry Advisory Committee** and were invited to participate on the **WSF Long Range Plan Policy Advisory Group**.
- Barbara is a Port of Friday Harbor Commissioner; she and staff assisted **NorthStar Air Tours** with its new Friday Harbor/Eastsound to Victoria flights, which finally took off this May.

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).

VISITOR SERVICES HIGHLIGHTS

SJIVB Visitor Services – We answered **619 phone calls** and **433 email** requests for visitor information and/or a travel brochure, and received **1,683** requests for brochures via our website. As a result, we sent out **6,482** brochures to individuals, DMOs, Chambers, AAAs, businesses, etc. A majority of our inquiries came from the following states: #1 Washington, #2 California, #3 Oregon, and Texas and Florida tied for #4 and #5.

Chambers of Commerce Visitor Services – We continued our **mutual 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. Also, our phone system refers callers to each of the three Chamber offices for island-specific visitor information.

TRACKING & MEASURING RESULTS

According to the following travel indicators, **tourism appeared to be healthy during the first half of 2018**. Lopez lodging tax was down significantly, however, like last year, it may catch up by the end of the year due to perhaps late collections and reporting to the State/County by some lodging properties. We’re not privy to lodging tax information so we’re not able to compare apples to apples. Regarding growth in lodging tax collections, we realize that these numbers reflect (1) more rooms sold to more visitors, (2) higher lodging rates than the year prior, and/or (3) more lodging properties may be collecting and reporting lodging tax due to new rules the State, County and/or Town are enforcing regarding new and old Airbnbs, VRBOs, etc.

County & Town TRAVEL INDICATORS	2017 Collected Through May (probable month of business activity)	2018 Collected Through May (probable month of business activity)	% Change from 2017 to 2018 Through May (probable month of business activity)
County Lodging Tax – “Special 2%”	\$253,250.00	\$274,005.00	8.19%
County Sales Tax	\$2,178,246.00	\$2,237,376.00	2.7%
Friday Harbor Lodging Tax – “Special 2%”*	\$70,088.92*	\$73,735.65*	5.2%*
Friday Harbor Sales Tax	\$576,465.38	\$622,346.21	7.95%
Lopez Island “Special” Lodging Tax	\$20,230.00	\$15,747.00	-22%
Orcas Island “Special” Lodging Tax	\$135,609.00	\$153,627.00	13.28%
San Juan Island “Special” Lodging Tax*	\$97,375.00*	\$102,998.00*	5.77%*

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

Washington State Ferries Ridership – Most first quarter stats were up; Lopez numbers were up for vehicle ridership but down for foot passengers. Second quarter stats were not yet available.

January 1 – March 31, 2018 (% change over 1st Quarter 2017)

Anacortes to:	Total Riders	% Change	Vehicles	% Change	Vehicle Pax	% Change	Foot Pax	% Change
Lopez	56,032	4.7%	32,448	3.9%	19,212	7.6%	4,372	-2.1%
Orcas	108,765	1.7%	58,905	1.2%	42,648	2.7%	7,212	0.3%
San Juan	136,539	3.6%	68,466	2.9%	46,045	4.7%	22,028	3.5%

MARKETING & OPERATING BUDGET

Our 2018 operating budget includes the following income and investments/expenses. The County Auditor receives monthly, detailed invoices, and the Friday Harbor Treasurer receives seasonal campaign/project invoices.

Income:

County lodging tax contract	\$ 460,334.00 (58%)
Friday Harbor lodging tax grant	\$ 186,265.00 (23%)
Membership dues, website ads, second/third listings	\$ 143,128.00 (18%)
Port of Seattle media relations grant	\$ 9,250.00 (1%)
Total	\$ 798,977.00

Investments/Expenses:

Seasonal & meetings/retreats ad campaigns (media buys & mgmt.)	\$ 272,149.80 (34%)
Media relations (marketplaces, press trips, tracking, etc.)	\$ 51,460.00 (6.4%)
Website & social media (upgrades, maintenance, hosting, etc.)	\$ 47,830.00 (6%)
Other marketing (brochures, e-news, weddings, photos, travel trade, etc.)	\$ 41,084.40 (5%)
Visitor services (phones & postage)	\$ 7,602.00 (1%)
Marketing personnel (4.9 FTE) (payroll, taxes, benefits, prof. dev.)	\$ 334,228.15 (42%)
Administration (rent, internet, technology, insurance, bookkeeping, etc.)	\$ 44,590.00 (5.6%)
Total	\$ 798,944.35

IN CONCLUSION

Based on the travel indicators above, tourism appeared to be healthy during the first half of 2018.

The SJIVB would like to thank the San Juan County Council, Friday Harbor Town Council, County and Town administrators, LTAC members, and our members for their support and investment in destination marketing. The SJIVB staff would like to thank our Board of Directors, Marketing Committee, The Communications Group, and No. 10 Web Company for their leadership, time and expertise.

We look forward to the continued, positive economic impact that our destination marketing 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 in the future. For further information or questions, please contact Deborah Hopkins Buchanan, Executive/Marketing Director, 378-3277 ext. 5, deborah@visitsanjuans.com, or Carl Silvernail, Board President, Owner/Innkeeper, Otter’s Pond B&B, Orcas Island, 376-8844, otter@otterspond.com.