

# VISIT SUN VALLEY

ANNUAL REPORT  
2019-2020





# CONTENTS

Welcome Messages	04
Purpose, Mission, Vision & Goals	06
Objectives	08
2019–2020 Highlights	10
New Initiatives	12
Results	14
Marketing, Advertising & PR	16
Visitor Center	24
Operations	26



This report covers our fiscal year October 2019 – September 2020





All the while, we continued to take care of our visitors. We developed a three-phase approach to our summer marketing efforts beginning by focusing on drive markets, moving to popular second-homeowner cities, and rounding this out with extended reach markets once it was clear that visitor confidence was building for summer travel.

As we look to the future, we know, more than ever, that tourism is a team sport, one where everyone must play an active role. Welcoming visitors back at pre-pandemic levels will take strategic, calculated, and thoughtful attention, with an emphasis on building loyalty and retention. Despite its impact on the Valley, the entire community banded together to address COVID-19. We are grateful for and want to celebrate the creativity, adaptability, and generosity of our businesses, individuals, organizations, and community groups. The resilience that everyone has shown certainly made me realize that this is truly “What We’re Made Of.”

# A MESSAGE FROM OUR DIRECTOR

The year 2020 was an interesting one, to say the least. At Visit Sun Valley, we’ve always known that marketing and advertising adapts with the times. This past year, more than ever, our ability to adapt as an organization has been tested around every corner.

In early March, as soon as it was clear that Sun Valley would not escape the impacts of COVID-19, Visit Sun Valley spearheaded a stakeholder meeting to inform, educate, and plan for addressing the pandemic. Not a week later, the community was asked to “shelter in place” to reduce the virus’s spread. Everything turned on its head; nothing felt normal.

At Visit Sun Valley, we have always been storytellers, but this year, we have also become messengers, communicators, facilitators, advisors, listeners, analyzers, and researchers. We placed ourselves on the front lines of communication and information, leaning on our incredibly strong community of local businesses to develop a unified voice and path forward.

# 2020 HIGHLIGHTS

- Before the pandemic, we recorded an exceptionally strong start to the year, with the best occupancy rates and tax collections on record. During that time, we welcomed the National Brotherhood of Skiers (See visitor results on page 19).
- Visit Sun Valley stayed adaptable, agile, and creative.
- Spearheaded stakeholder meeting to inform, educate, and plan for addressing the COVID-19 pandemic.
- Published community and visitor resources related to COVID-19, including a COVID-19 landing page, a business openings, closures, and offerings guide, and a self-isolation inspiration blog.
- Coordinated guidelines of re-opening for lodging partners.
- Communicated PPE and PPP information in partnership with SVED and the The Chamber to the business community.
- Created a resource guide for businesses to use as guest-facing communications.
- Developed toolkits for messaging to visitors, clients, and guests.
- Hosted a meeting for Mountain Destination Chambers and DMOs.

Regards,

Scott Fortner, Executive Director  
Visit Sun Valley



# A MESSAGE FROM OUR CO-CHAIRS

COVID-19’s impact has reached far and wide, requiring every business, individual, and organization to adapt to a new way of interacting with their customers, friends, and even their families. At Visit Sun Valley, we are prepared to help the community navigate what is next, safely and sustainably.

As a community that relies on tourism for two-thirds of our economy, last year’s journey was at times a painful one. However, in the spring, with businesses reeling from shutdowns and a lack of tourists, Visit Sun Valley, its staff, and the Board of Directors decided to shift our attention to include not only visitors, but our local businesses, their employees, and the community.

One lesson from the past year is a renewed sense of the importance of “quality of life” in how our residents and visitors experience Sun Valley. We’ve worked hard to educate, integrate, and steward the influx of people into our community with campaigns like Mindfulness in the Mountains (see page 12 for more information on the year’s new initiatives). We remain focused on strengthening our tourism

economy safely and sustainably while maintaining our unique mountain culture. Our incredible quality of life is poised to create new opportunities for our Valley and the chance for our economy to rebound stronger than ever.

As we look ahead, “business as usual” takes on a new meaning. It’s no longer what we did in the past, but our resilience and adaptability for the future. There will be new opportunities and new challenges. We must remain respectful and empathetic, cautiously optimistic, and thankful for the resources that we have.

Kind Regards,

Diann Craven & Candice Pate, Co-Chair  
Visit Sun Valley



# PURPOSE, MISSION, VISION & GOALS

## OUR PURPOSE

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To create a better life for our community and the experience of the visitors through sustainable tourism with the strategy of right place, right people, right time.

## OUR MISSION

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To raise awareness of Sun Valley, Idaho, and influence consumers in an effort to sustainably balance visitation from our target markets and valued guests.

## OUR VISION

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Sun Valley will be recognized as a leader in mountain resort lifestyle, culture, and recreation.

## OUR GOALS

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### PRE-PANDEMIC GOALS (OCT - MAR)

- Build sustainable visitation to the area in underutilized seasons.
- Increase market share.
- Increase Raw Occupancy by +5% and Room Nights Sold by +8%.
- Influence positive growth of Local Option Tax collections.
- Maintain an airline seat occupancy of 70% - 75%.

### PANDEMIC GOALS (MAR - SEPT)

- Increase the average dollar spent by guests visiting the Sun Valley area.
- Limit Raw Occupancy decreases to -10% through the winter months and Room Nights Sold by -25%, pending the influences of the COVID-19 pandemic.
- Increase tax collections back to equal levels of the 5-year average.
- Maintain consistent air service to our current nonstop flight markets.
- Build sustainable visitation and educate newcomers of the culture and spirit of the Sun Valley area.



# OVERALL OBJECTIVES

## PRE-PANDEMIC OBJECTIVES

- Work with stakeholders to make well-informed strategic decisions for the future growth of the Wood River Valley.
- Engage repeat visitors to encourage visitation in seasons they have not experienced.
- Inform visitors of the plethora of activities and experiences that the area has to offer to increase spend and length of stay.
- Leverage the access to our wide array of outdoor spaces in our PR and advertising efforts.
- Create awareness for Sun Valley and the Epic Pass partnership.
- Continue engagement with our nonstop flight markets to ensure awareness of the air access to Sun Valley driven by our "Getting Here" landing pages.
- Work with lodging properties to build promotions and value-added offerings that entice visitors during low occupancy periods.
- Develop a lifetime value of the guest model.
- Continue to evaluate more stable funding models.

## PANDEMIC BASED OBJECTIVES

- Engage with regional drive audiences, second homeowners, and past guests familiar with the destination.
- Explore adaptations of the lifetime value of the guest model to reflect the changes in visitor behaviors and patterns.
- Look for opportunities to increase the dollar value of the guest through longer lengths of stay and increased spending.
- Build out a series of information touchpoints for best-practices on traveling to and enjoying the open spaces of Sun Valley.
- Create and distribute pandemic-related messaging through our COVID landing page.
- Develop Mindfulness in the Mountains, an awareness campaign for new visitors and residents focusing on stewardship and education. Mediums include posters, masks, and guides.
- Leverage a wider range of communication tactics, outlets and channels than had ever been established previously.



# 2019-2020 HIGHLIGHTS



## PRE-PANDEMIC HIGHLIGHTS

- Expanded our board and advisory committee seats to represent a broader range of sectors.
- Added two new members to our team – Cody Richmond as the Marketing Coordinator and Kami Miller as the Visitor Center Manager.
- Introduced Sun Valley as an Epic Pass partner.
- Hosted the National Brotherhood of Skiers.

## PANDEMIC HIGHLIGHTS

- Collaborated with a variety of stakeholder groups to learn from, inform, and strategize on topics ranging from sustainable tourism to health and safety concerns.
  - Wood River Valley Tourism Coalition
  - Outdoor Recreation Management Group
  - Sun Valley Lodging Association
  - Blaine Recovery Committee
- Developed a series of COVID-19 related materials and messaging that included a website landing page, weekly emails, and a business toolkit.
- Launched the Mindfulness in the Mountains campaign that emphasizes cultural and recreational education as well as best health practices.
- Worked with recreational leaders to develop trail etiquette awareness.
- Developed and adapted an ongoing set of FAQs, many of which have been integrated into our new automated chat feature on [visitsunvalley.com](https://visitsunvalley.com).
- Maintain the airport's lineup of air service from 6 nonstop destination including Chicago, Denver, Los Angeles, Salt Lake City, San Francisco and Seattle.
- Assisted in the development of operational safety protocols for lodging and accommodation partners.



# NEW INITIATIVES



## PRE-PANDEMIC INITIATIVES

- Creation of Stakeholder Group: Wood River Valley Tourism Coalition
- Joining of the 'Pledge for the Wild' initiative in conjunction with the Blaine County Recreation District
- Welcome Epic Pass holders

## PANDEMIC INITIATIVES

- Participation in newly formed Local Stakeholder Groups
  - Long Term Recovery Committee
  - Adaptive Recovery Committee
  - Outdoor Recreation Management Group
- Mindfulness in the Mountains Campaign
  - Landing Page
  - Informational Posters | Summer & Fall
  - Masks
- COVID-19 Informational Landing Page
- COVID-19 Related Blogs
- Integrated website chatbot to answer Frequently Asked Questions
- COVID-19 Business Toolkit
- COVID-19 Post Recovery Brief
- Business Opening and Closure Public Information Document
- Trail Etiquette Informational Poster





# SUN VALLEY VISITOR RESULTS

## PRE-PANDEMIC RESULTS

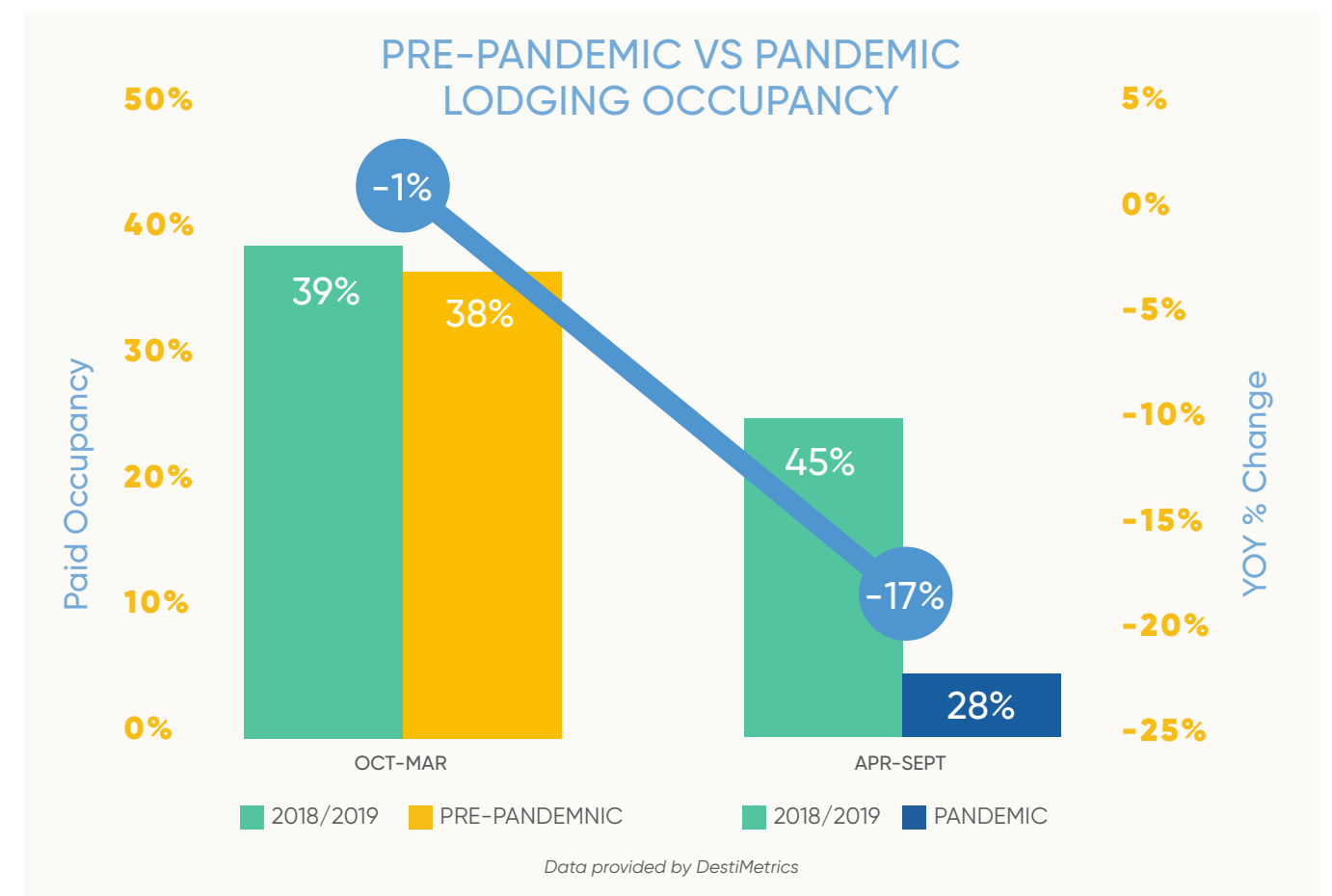
The start of the year kicked off strong thanks to better-than-average winter visitors coupled with an uptick in group-oriented visitation.

- Year-over-year growth during the fall season.
- Record breaking winter visitation, especially in February (lodging occupancy +28%). March was on track to be a record month before the lockdown occurred.

## PANDEMIC RESULTS

As expected, room nights sold decreased significantly during the pandemic, with near non-existent group and business bookings. Travelers that were comfortable visiting found more confidence staying isolated in vacation rentals.

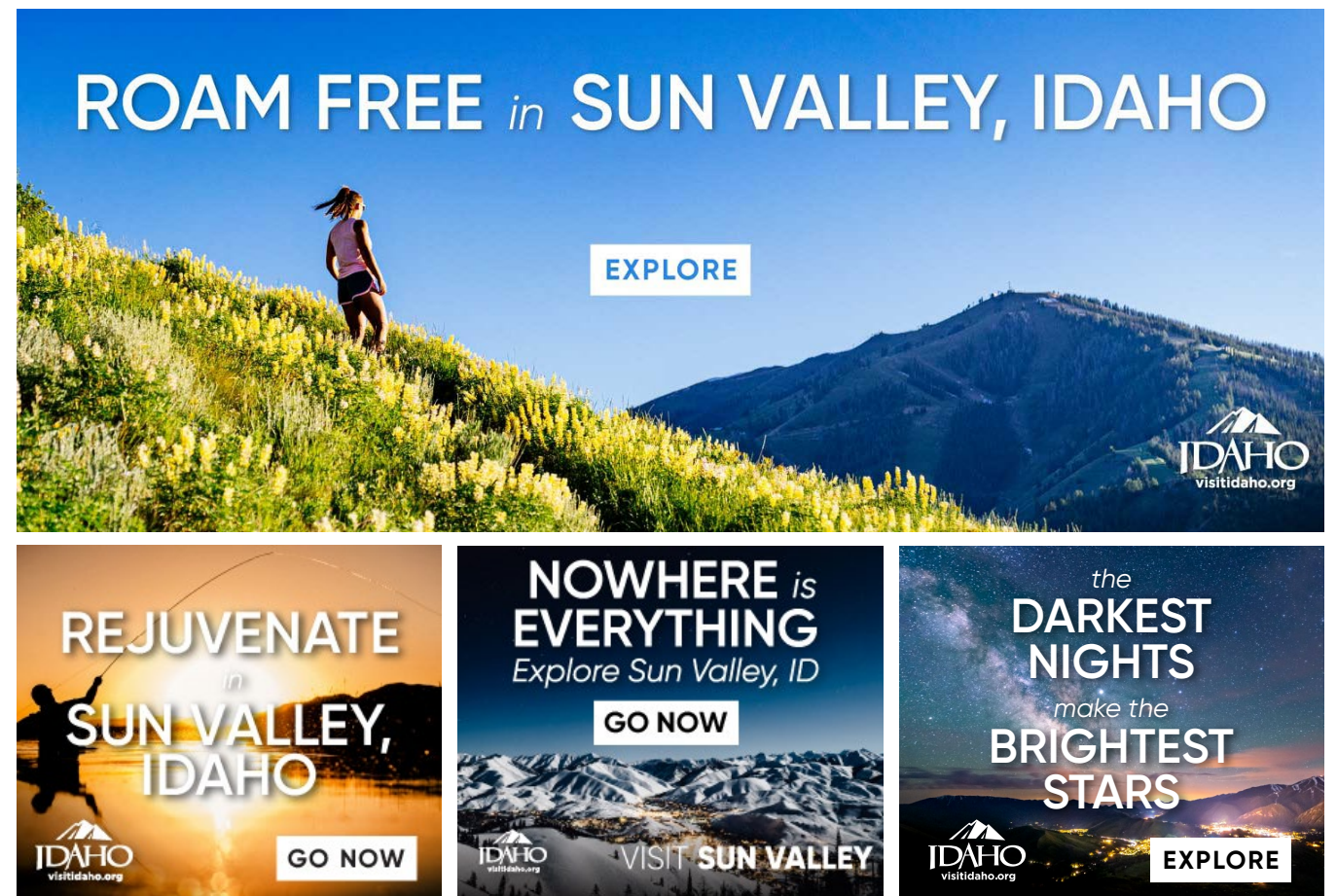
- Significant decreases in lodging occupancies due to the lack of group bookings.
- Considerable decreases in airline seat occupancy.
- Strong Valley-wide home sales.
- Increased outdoor recreation.
- Strong recreation-based retail sales.



**We were on pace to have a record winter with lodging occupancy and tax collections all eclipsing previous years.**



# MARKETING, ADVERTISING, & PR



## MARKETING, ADVERTISING, & PR

When we think of marketing and advertising, we think in the long and short term, not one or the other. The strategy revolves around the actions that we take in the short term that help us move a few steps closer to meeting the long term goals. Our process follows the evolution of customer attraction, to retention, and ultimately to loyalty.

Sustainability and audience alignment are top priorities when formulating our initiatives. We strive to maintain the integrity of this destination through mindful identification of opportunities ranging from activities to underutilized periods of visitation.

Advertising and marketing methods and approaches are ever-evolving. We work with a team of cutting edge strategists, creatives, and media buyers to stay on top of emerging trends and opportunities.



# PRE-PANDEMIC MARKETING & ADVERTISING

OCTOBER - MARCH

Moving into the 2019/2020 winter season, our approach focused on the continuation of the “What We’re Made Of” campaign, where we tapped into the unique culture born from Sun Valley’s rich history and the people that call it home. These people and entities include, but are not limited to, innovators, adventurers, creators, and entrepreneurs.

Building awareness of Sun Valley’s partnership with the Epic Pass was a top priority for us. We prioritize the alignment of our messaging to target pass holders within our nonstop flight markets before branching out elsewhere.

The second segment of our efforts focused on the attraction of a younger active audience to the area. The time has come to bring an influx of new energy and appreciation to the region while paving the way for the next generation of lifelong guests. It is important to note that both the Epic Pass holder group and younger audience profile are predominantly new or unexposed potential visitors to the area.

## TARGET AUDIENCES

- Active fun-loving families (especially younger-skewed visitors)
- Affluent outdoorsy travelers
- Avid activity participants (especially Epic Pass holders)
- Culture seekers

## TARGET MARKETS

- **NONSTOP:** Chicago, Denver, Los Angeles, San Francisco, & Seattle
- **OTHER NATIONAL:** Epic Pass markets, New York, Portland, & Boston
- **REGIONAL:** Boise, Twin Falls, & Salt Lake City

# PRE-PANDEMIC RESULTS

111,606 ▲ 5%

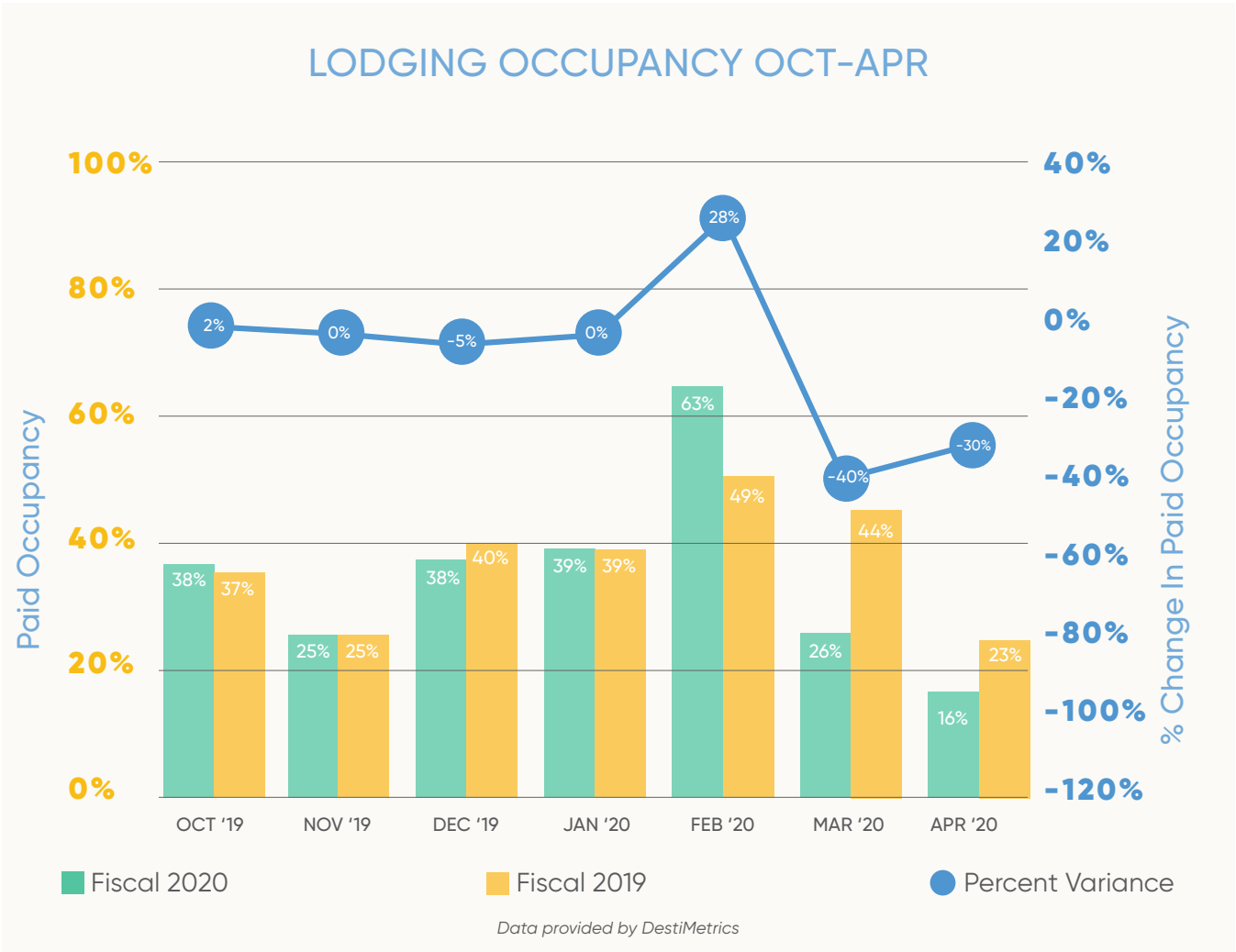
ORGANIC WEB SESSIONS

\$1,077,766 ▲ 8%

LOCAL OPTION TAX COLLECTIONS

36,858 ▲ 20%

ENPLANEMENTS





# PANDEMIC MARKETING & ADVERTISING

## MARCH - SEPTEMBER

As winter drew to a close and the COVID-19 pandemic settled in, the need to adapt our strategies hit fast and hard. With travel careening to a screeching halt, our directives shifted from attraction to awareness and education. Safety protocols and all-around information on the transformations within our destination became the top priority for visitors. On the local business front, we provided toolkits, best practices, ongoing COVID-19 updates, and more in an effort to help them successfully navigate the challenging times.

When travel began to open back up once again, we looked to engaging audiences that were familiar with the destination. We reminded guests that Sun Valley was and still is here and that vast open spaces awaited them. We urged guests to not cancel their plans completely, but rather to rebook them for a time when they might be more comfortable.

We rolled out our summer campaign in a series of phases that began with engaging friends and family as well as second homeowners. We then moved onto people that we had identified as being familiar with the place. Lastly, we looked for new potential visitors that aligned with our outdoor activity interests.

In addition to the awareness plays, we launched a campaign called Mindfulness in the Mountains to continue the education-based endeavours. This initiative brought together a collection of resources that included the phases of openings, recreation resources, insights to our mountain culture, and safety procedures for visitors and locals alike.

## TARGET AUDIENCES

- Second homeowners
- Those familiar with Sun Valley as a destination
- Outdoor adventure seekers
- Mountain bikers & wellness seekers

## TARGET MARKETS

- **NONSTOP:** Denver, Los Angeles, San Francisco, & Seattle
- **REGIONAL:** Boise, Twin Falls, & Salt Lake City

# PANDEMIC RESULTS

193,325 ▲ 1%

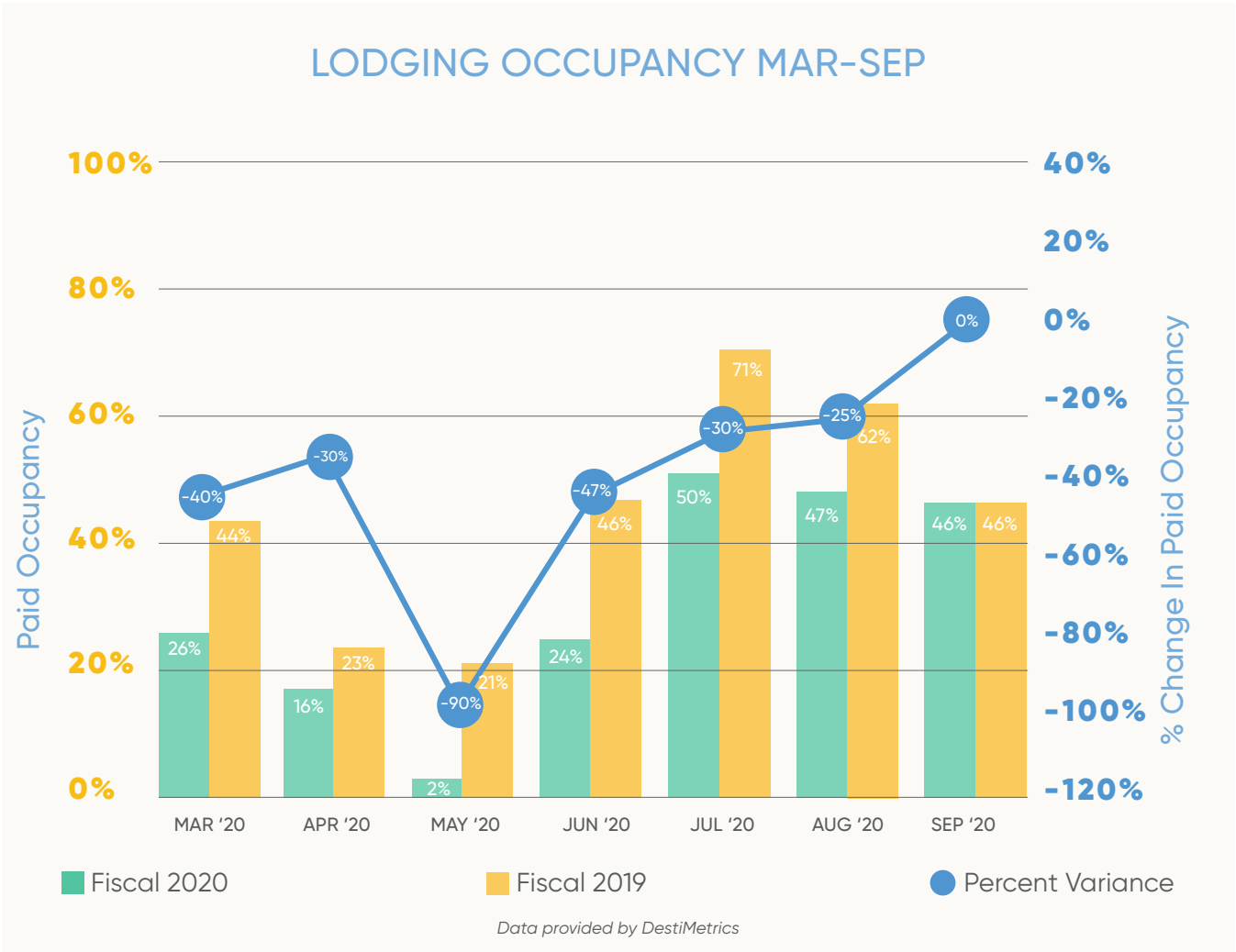
ORGANIC WEB SESSIONS

\$1,197,932 ▼ 10%

LOCAL OPTION TAX COLLECTIONS

12,616 ▼ 74%

ENPLANEMENTS





# PUBLIC RELATIONS

The value of earned media continues to be one of the best endorsements and validations for what Sun Valley has to offer. This area and its make-up continues to produce positive, news-worthy stories. We keep a close finger on the pulse of the community to cultivate, package, and pitch the unique highlights that make Sun Valley shine.

## PRE-PANDEMIC EFFORTS & HIGHLIGHTS

The start of the year was business as usual. The Epic Pass partnership, winter based-recreation, and wellness were our primary angles.

### JOINT MEDIA MISSION TO SEATTLE

- We teamed up with several local lodging properties and vendors to participate in the annual premier of the Warren Miller ski movie.
- With Seattle’s strong Epic Pass owner base, we were able to inform this engaged audience of our new partnership.
- Our team completed desk-side visits to Seattle based journalists on the front and back end of the premier.
- Additionally, we were able to meet with the Alaska Airlines team to continue to foster our relationship.

### TALKING POINTS

- Epic Pass partnership
- Backcountry skiing & snowboarding
- Wellness
- Dark skies
- Arts & culture



## PANDEMIC EFFORTS & HIGHLIGHTS

Messaging during the pandemic shifted significantly from travel-enticing angles to highlighting the success stories amidst the devastating challenges. Addressing the media’s sensationalized stories stemming from COVID-19.

Vast numbers of publishers furloughed their journalists and the majority of those that were still on staff were unable to travel. As a result, we had several media visits lined up that were ultimately canceled. We shifted our hosting efforts to virtual awareness campaigns aimed at reminding our audience of the amazing outdoor access and remote working opportunities in the Sun Valley area.

### TALKING POINTS

- Open spaces and outdoor recreation
- Dark skies
- Wellness
- Remote work and schooling opportunities





## VISITOR CENTER

Visit Sun Valley's Visitor Center goals are to provide exceptional customer service to guests and potential guests, as well as to identify new and innovative ways of meeting guest's needs.

### PRE-PANDEMIC GOALS & OBJECTIVES

- With a new manager and additional staff, the Visitor Center focused on increased coverage to maximize its service potential to the guests and community.

**WELCOMED ▲ 6,000 GUESTS**

### PANDEMIC EFFORTS & HIGHLIGHTS

To expand the reach of the Visitor Center and to assist those who interface with guests on a regular basis, staff connected with local business owners to:

- Share information and guidance from Visit Sun Valley's Mindfulness in the Mountains campaign
- Gather information from open businesses about their operating procedures and hours, in order to share those details with the public in a central document on [visitsunvalley.com](https://visitsunvalley.com)

With social distancing protocols in place, the Visitor Center reopened to the public from June 16 through October 18. We deployed touchless resources, like the ability to scan QR codes for information, to assist visitors with minimal contact. In addition, we distributed 5,000, custom-made Mindfulness in the Mountains masks to guests during this period.

**WELCOMED ▲ 2,700 GUESTS  
DISTRIBUTED 5,000 MASKS  
ENHANCED LOCAL OUTREACH**



# VENDORS

Specialized vendors assist us in meeting our goals and mission while keeping our staffing costs down.



**MEDIA BUYING & STRATEGY**  
Backbone Media – Carbondale, CO



**CREATIVE DEVELOPMENT**  
Two Things – Portland, OR



**PUBLIC RELATIONS**  
Fahlgren Mortine – Boise, ID



**WEB DEVELOPMENT**  
43 Web Studio – Ketchum, ID



**SEARCH ENGINE OPTIMIZATION**  
RightNow Communications – Boise, ID

# CREATIVE SERVICES

Tapping talented local creatives allows us to produce in-the-moment deliverables.



**VIDEO**  
Stellar Media – Ketchum, ID

**BLOGGING**  
Multiple team members all based in the Wood River Valley – Ketchum, ID



**GRAPHIC DESIGN**  
Cara Shumate – Ketchum, ID



# FUNDING PARTNERS

We are grateful for the working relationship with our funding partners, including the Mayors and Councils of both the City of Ketchum and City of Sun Valley, the Idaho Travel Council, and the Sun Valley Air Service Board.

We'd also like to thank our associate members of Visit Sun Valley.



# 2020 FISCAL YEAR

Visit Sun Valley has been fortunate that our funding partners—City of Ketchum, City of Sun Valley and the Idaho Travel Council—were able to maintain their funding contributions. We saw a slight reduction in the 1% for Air collections via the Air Service Board, delivering 95% of our original estimated amount. This deficit was offset by our shift in strategy during the lockdown and a reduction in labor costs due to the ensuing pandemic.

## PROJECTED BUDGET

TOTAL – \$3,137,846



## PRE-PANDEMIC EXPENSES

TOTAL – \$2,906,900



## PANDEMIC EXPENSES

TOTAL – \$2,345,900





# OUR TEAM & SUPPORT

Visit Sun Valley is a small but mighty team drawing from a variety of backgrounds capable of being highly collaborative, nimble, and multifaceted. One of our greatest assets is our communities' dynamic citizens. We have assembled two groups of highly engaged community leaders and members to provide insight to our organization via our Board of Directors and Advisory Committee. The committee expanded in 2020 to increase its outreach and feedback from a variety of businesses and nonprofit sectors in the broader Sun Valley community.

## Visit Sun Valley Staff



SCOTT FORTNER  
*Executive Director*



RAY GADD  
*Marketing Director*



ALY SWINDLEY  
*Community Relations*



CODY RICHMOND  
*Marketing Coordinator*

## Visitor Center Staff



KAMI MILLER  
*Visitor Center Manager*



CLAUDIA MOHR  
*Visitor Center Agent*



CRUGER THOMAS  
*Visitor Center Agent*



IRENE KOHLI  
*Visitor Center Agent*

## Board of Directors



DIANN CRAVEN  
*Board Co-Chair*



CANDICE PATE  
*Board Co-Chair*



KRISTIN POOLE  
*Advisory Committee Representative*



TIM SILVA  
*Sun Valley Company Representative*



CASSIE ABEL  
*At Large*



OLIN GLENNE  
*City of Ketchum Representative*



MIKE BURCHMORE  
*City of Sun Valley Representative*

WE'D LIKE TO WELCOME MIKE BURCHMORE TO THE BOARD AS THE CITY OF SUN VALLEY REPRESENTATIVE

## Advisory Committee

- RETAIL SECTOR | SUSAN NIEVES | *Independent Goods*
- CONSERVATION SECTOR | JEN SMITH | *Sawtooth Botanical Gardens*
- NONPROFIT SECTOR | MIKE WOLTER | *Wood River YMCA*
- RECREATION SECTOR | PADDY MCILVOY | *Backwoods Mountain Sports*
- REAL ESTATE SECTOR | EEVA TURZIAN | *Sun Valley Real Estate*
- TRANSPORTATION SECTOR | KIM MACPHERSON | *Mountain Rides*
- ENTREPRENEUR SECTOR | JACOB FREHLING | *Maude's Coffee & Clothes*
- ARTS & CULTURE SECTOR | GAIL SEVERN | *Gail Severn Gallery*
- FOOD & BEVERAGE SECTOR | BEN BRADLEY | *Warfield Distillery & Brewery*
- LODGING SECTOR | TIM JOHNSON | *Limelight Hotel*





#### **CONTACT US**

visitsunvalley.com | 208-726-3423

#### **VISITOR INFORMATION CENTER**

491 Sun Valley Road, Ketchum, Idaho 83340

#### **OFFICE LOCATION**

160 Sun Valley Road West, Ketchum, Idaho 83340

#### **MAILING ADDRESS**

PO Box 4934, Ketchum, Idaho 83340