

A scenic view of a valley at sunset. The sun is low on the horizon, creating a bright orange and yellow glow that radiates across the sky. The sky is filled with soft, pinkish-orange clouds. In the foreground, a ski lift chair is suspended from a cable, its silhouette visible against the bright sky. The chair has a striped backrest. The valley below is a mix of green fields and dark, silhouetted mountains. The overall mood is peaceful and scenic.

2018 2019

ANNUAL REPORT

VISIT **SUN VALLEY**

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THIS REPORT COVERS OUR FISCAL YEAR
OCT 2018 – SEPT 2019

OLIN GLENNE

CHAIR OF THE BOARD OF DIRECTORS



The Board of Directors of the Sun Valley Marketing Alliance believes that Sun Valley is a world-class travel destination, and is a dynamic place to live, work, and visit. We believe that travel and tourism strengthen our community’s economic position and provides opportunities for businesses, individuals, and non-profits in the Sun Valley area.

Like all great destinations, marketing and image play a role in attracting and retaining visitors to Sun Valley. The Sun Valley Marketing Alliance’s public-facing arm, Visit Sun Valley, works to promote and represent Sun Valley in major markets throughout the United States. The Board fully supports this mission by providing expertise, resources, and a vision for tourism-based marketing that will help our local businesses prosper and succeed.

Collaboration has been the Board’s theme for the past year.

One of our primary goals was to strengthen our relationship with the city and county governments, the business community, and local non-profits like the Fly Sun Valley Alliance and Sun Valley Economic Development. We have made significant progress toward this end, though we know there is still room for growth and improvement.

I appreciate the passion, dedication, and expertise that the Board has poured into the Sun Valley Marketing Alliance over the past year. I am bullish on the future and look forward to working with the Board, Advisory Committee, and staff of Visit Sun Valley in 2020.

A stylized, handwritten signature in dark ink that reads "Olin Glenne".

– Olin Glenne, Chair of the Board of Directors

SCOTT FORTNER

EXECUTIVE DIRECTOR

In 2019, the Visit Sun Valley team focused on leveraging strategies and opportunities that have a positive impact on the towns and businesses of Sun Valley, Ketchum, and Hailey. From our marketing and public relations initiatives to our relationship with local stakeholders, we are focused on longer-term strategies that support a vibrant, prosperous future that works in harmony with our tourism-based economy.

In the past year, we continued to increase our outreach and communication with our constituents, including reinventing our Advisory Committee to represent ten different sectors of business and organizations. Through this outreach, we have listened, made adjustments to our initiative’s goals, and feel more in tune with our constituents’ issues, concerns, and desires.

We also endured funding challenges in the last year. As such, we have dedicated time to building a foundation of metrics, like our Return on Investment Index, to evaluate future projects, measure their efficacy, and work to provide a clearer picture to stakeholders on the positive value of our efforts on the local economy.

Our initiatives in 2019 will help to guide the organization in the year to come. In the next year, we will continue to focus on establishing best practices, creating a path to stable funding, and serving the local cities and business community of the Sun Valley area.

A handwritten signature in dark ink that reads "Scott Fortner".

– Scott Fortner, Executive Director





OUR PURPOSE

The Sun Valley Marketing Alliance, operating as Visit Sun Valley, promotes Sun Valley as a world-class travel destination, a desirable place to live, and a dynamic place to work.

OUR MISSION

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

OUR VISION

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

OUR GOALS

- Increase market share
- Increase Raw Occupancy by +5% & Room Nights Sold by +8%
- Influence positive growth of Local Option Tax collections
- Maintain air load factor of 70% - 75%
- Build sustainable visitation to the area in underutilized seasons



OVERALL OBJECTIVES

- Continually evolve advertising strategies to strategically target ideal guests in efficient and compelling ways
- Drive conversion marketing messaging to our all-inclusive “Getting Here” webpage to highlight nonstop air service into SUN
- Develop a measurement for the lifetime value of a guest
- Cultivate the next generation of young visitors that align with our target audiences
- Work with stakeholders to make well-informed strategic decisions for the future growth of the Wood River Valley
- Work with lodging properties to build promotions that entice visitors during low occupancy periods
- Drive promotions that encourage longer lengths of stays

2018-2019 RESULTS AT-A-GLANCE

- Increased visitation in the Sun Valley area, especially in the shoulder seasons of spring and fall
- The cities of Ketchum, Sun Valley and Hailey continue to see record increases in their collection of Local Option Taxes (LOT)
- Developed a “Return on Investment” (ROI) index as a mechanism to track reservations on airline tickets, hotel stays, and car rentals from visitors who interacted with Visit Sun Valley’s online advertising
- Fly Sun Valley Alliance’s air program continued to offer better access to visitors and residents
- Collaborated with the Lodging Association on projects such as familiarization tours, media hosting, promotion, and sales initiatives



//
**SUN VALLEY,
WHERE WILDERNESS
AND ADVENTURE MEET
COMMUNITY AND
CULTURE."**

2018-2019 HIGHLIGHTS

- Relaunched visitsunvalley.com with an enhanced user experience
- Hosted OUTERBIKE in June
- Launched a web-based toolkit to help businesses and organizations leverage place-branding in their marketing efforts
- Initiated a fact-based review of the Tourism Economy Assessment to guide future decision making
- Awarded hosting of the Mountain Travel Symposium in 2022
- Reinvented the Advisory Committee to represent more sectors of local businesses
- Began exploring additional funding mechanisms for long-term sustainability

NEW INITIATIVES

- 13 Brand Story
- 14 Place Branding
- 16 Website Update
- 18 Sun Valley Visitor Results
- 20 Funding Assessment
- 22 Outerbike
- 24 Mountain Travel Symposium

//
**SUN VALLEY, A QUIETLY KICK-ASS,
CULTURED AND DOWN TO EARTH
DESTINATION."**



BRAND STORY

Sun Valley is a self-described quietly kick-ass yet cultured place. We have a modest, unpretentious, down-to-earth feel that embraces both its residents and guests as the same – regardless of their age, income, or social status.

PLACE BRANDING

Place Branding isn't about a logo, tagline or ad campaign. In the experience economy, an integrative place branding strategy focuses on community, policy, innovation, product programming, infrastructure investments and symbolic actions.

We invited community leaders from diverse sectors across the Wood River Valley to provide their insights and thoughts on how we define ourselves. The resulting guide communicates the elements of the Sun Valley brand in a way that will advise and support its stakeholders in a continued and consistent expression.

THE VALUE WE BRING TO OUR GUESTS

These buckets are where we look to align with for our advertising efforts throughout the year.

BRAND VALUE PROPOSITION

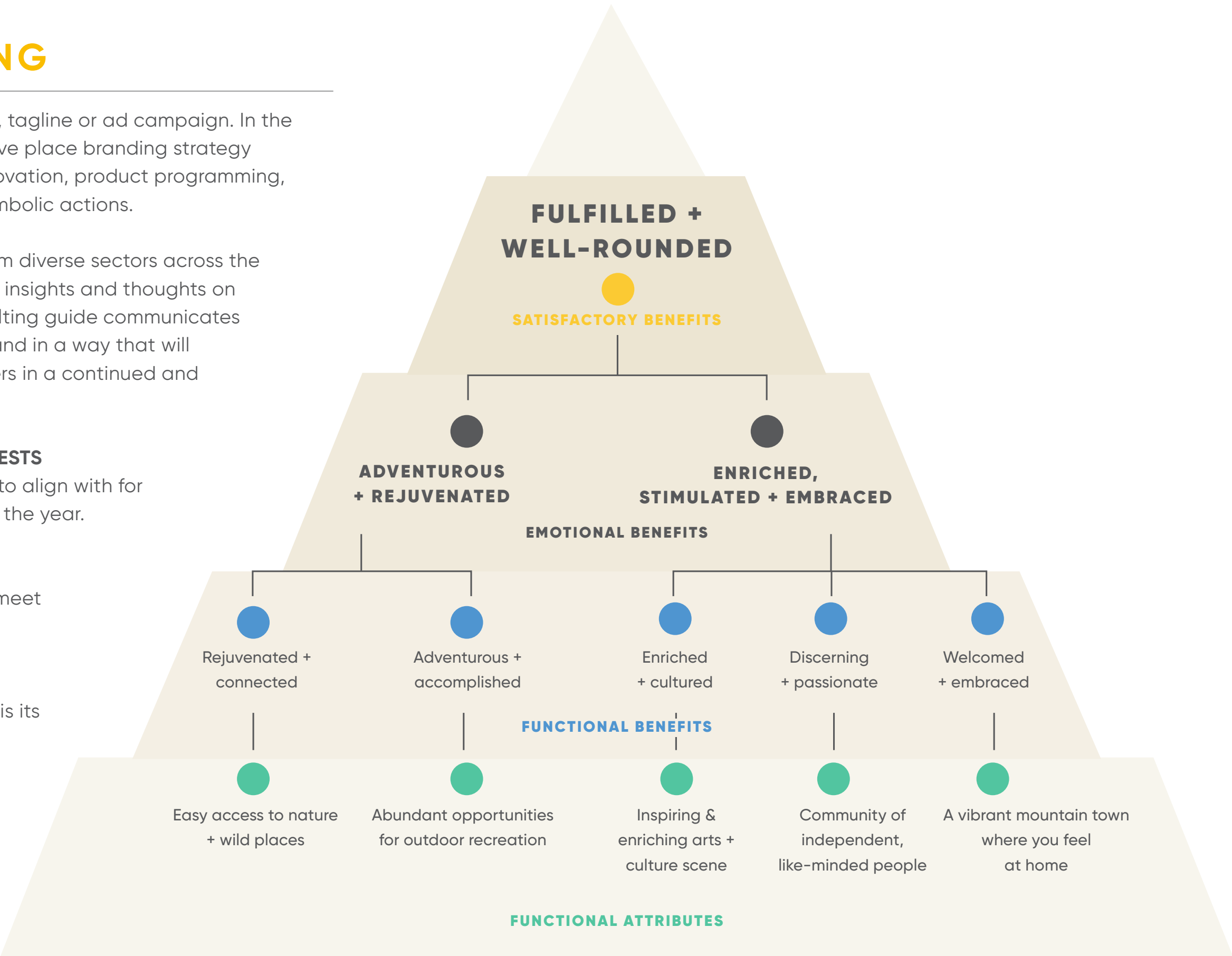
Where wilderness and adventure meet community and culture.

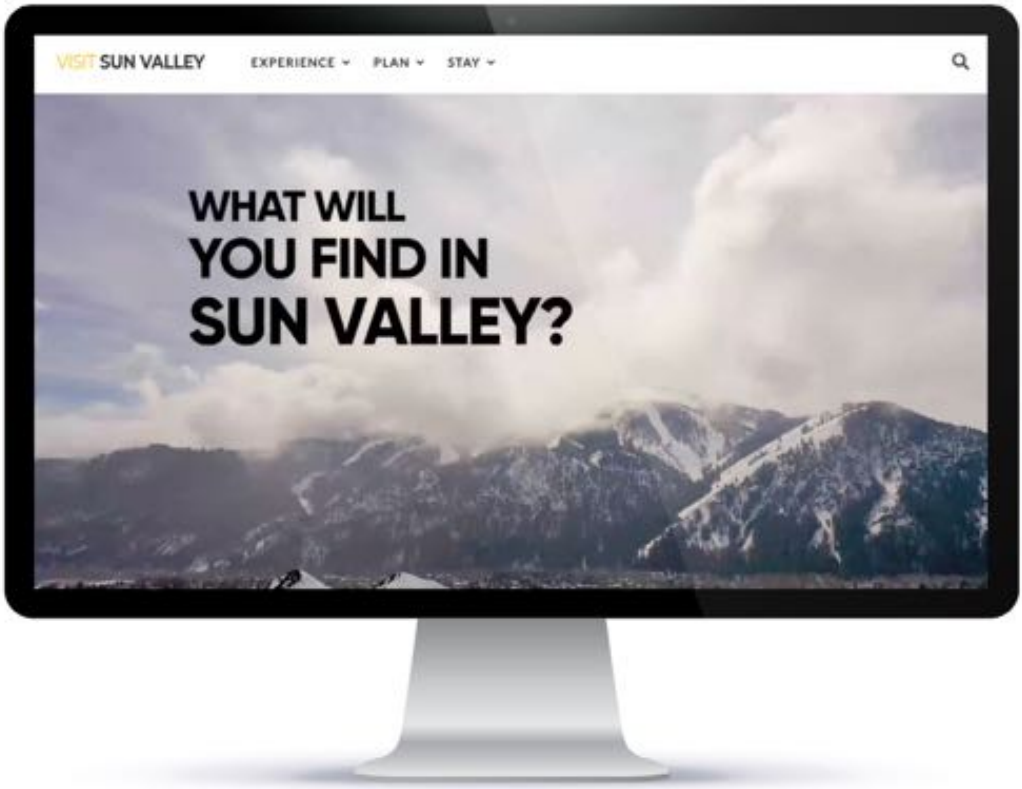
BRAND ESSENCE

At the heart of Sun Valley's brand is its quietly kickass yet cultured spirit.

OUR IDEAL GUESTS

- Active Fun-Loving Families
- Affluent Outdoorsy Travelers
- Avid Activity Participants
- Culture Seekers



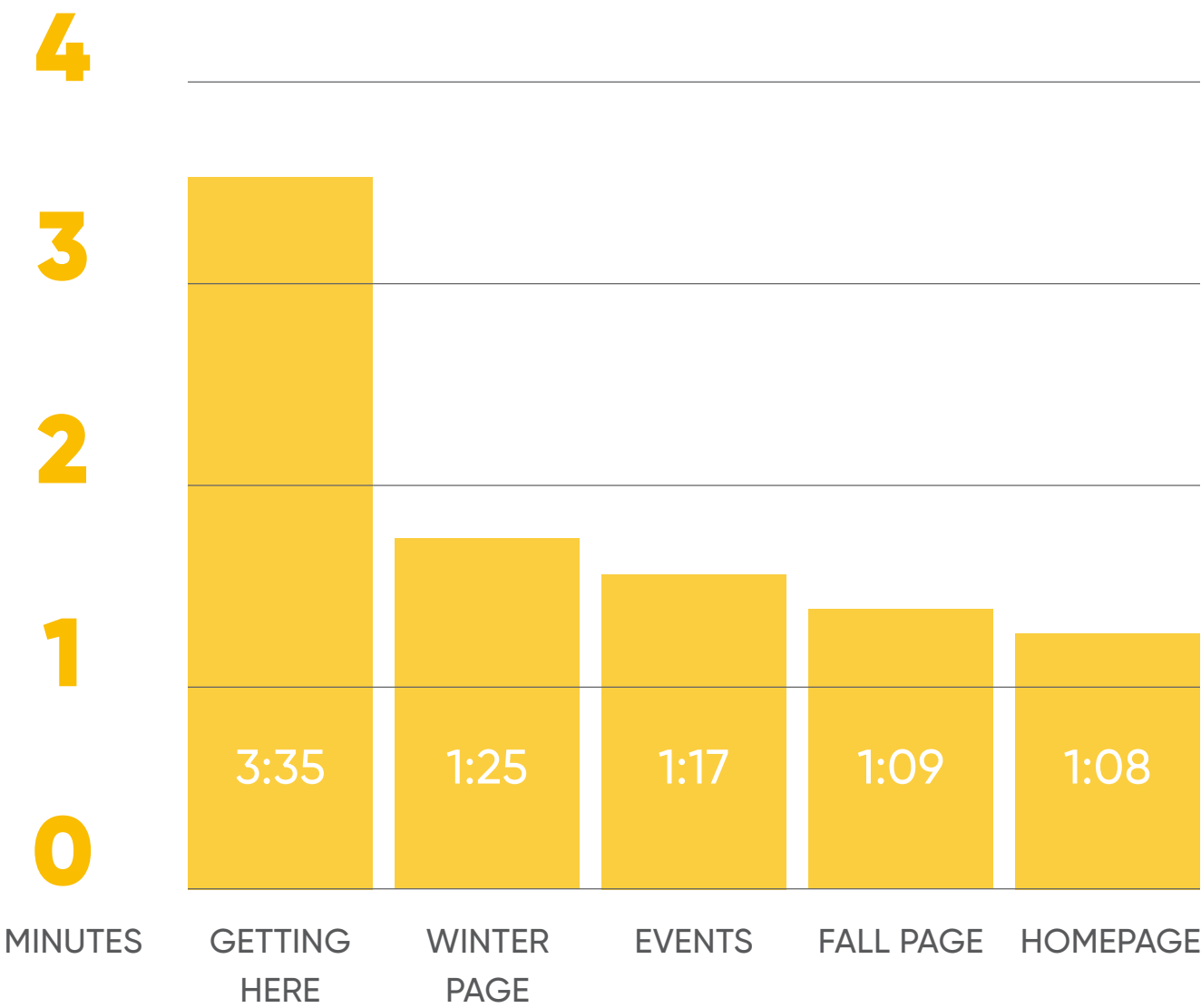


▲ 22%

WEBSITE UPDATE

We developed a new website with the help of **43 Web Studio** to improve the user experience through better navigation structure and enhanced visuals.

Organic traffic to the site was **up 22%** from June - September.



TOP 5 MOST VISITED SECTIONS

- 1. **GETTING HERE** – 3:35 Minutes on Page
- 2. **WINTER LANDING PAGE** – 1:25 Minutes on Page
- 3. **EVENTS** – 1:17 Minutes on Page
- 4. **FALL LANDING PAGE** – 1:09 Minutes on Page
- 5. **HOMEPAGE** – 1:08 Minutes on Page

SUN VALLEY VISITOR RESULTS

Sun Valley’s visitor base is growing and diversifying. Over the last three years, in particular, the area has welcomed geographically diverse visitors, thanks in part to non-stop flights from locations like San Francisco and Denver and population growth in the regional cities of Boise and Twin Falls. In addition, we are experiencing an uptick in visitors from younger generations.

The results also suggest that new and repeat visitors to Sun Valley over recent years bear many resemblances to Sun Valley’s traditional user base.

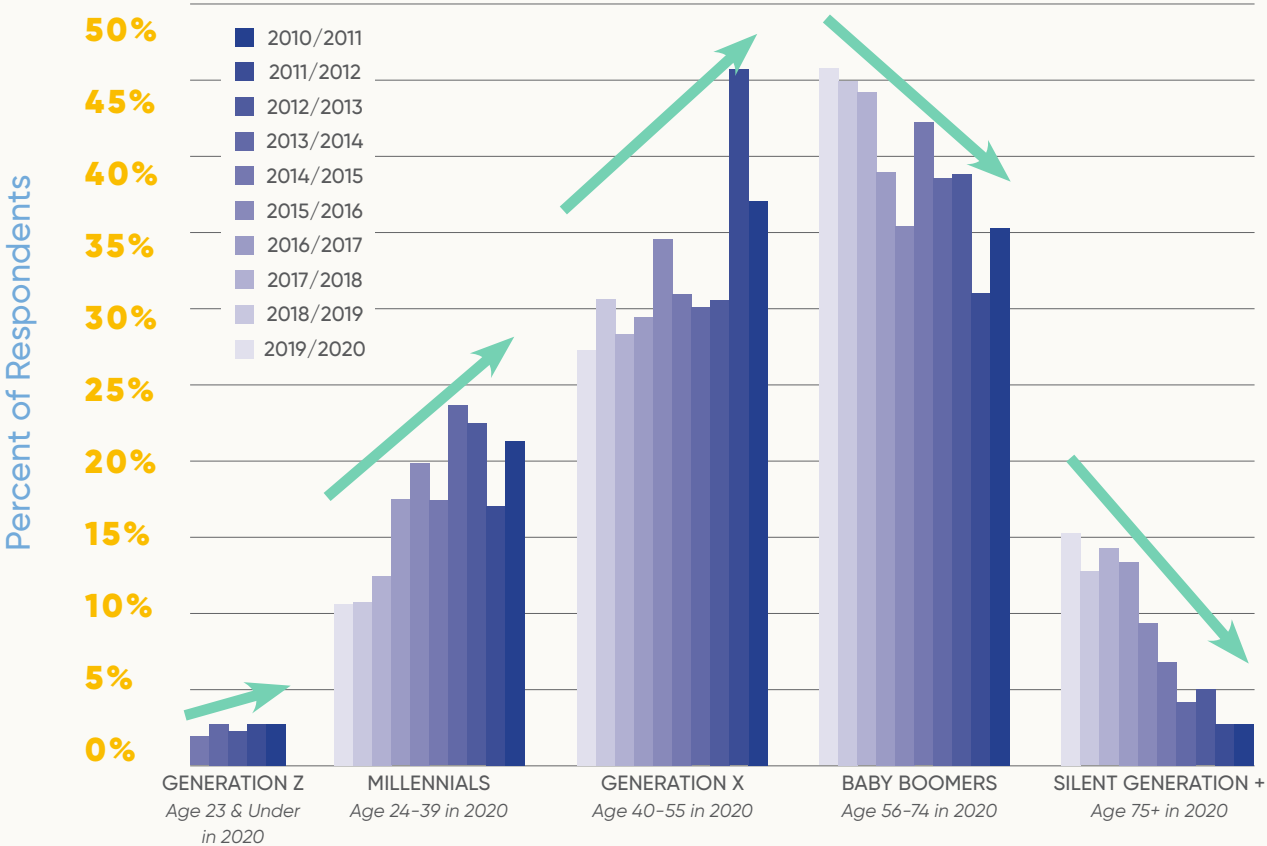
THERE IS DEFINITELY A VISITOR TRANSITION TAKING PLACE, WITH YOUNGER GENERATIONS REPLACING OLDER GENERATIONS."

NOTABLE SHIFTS IN SUN VALLEY’S VISITOR PROFILE:

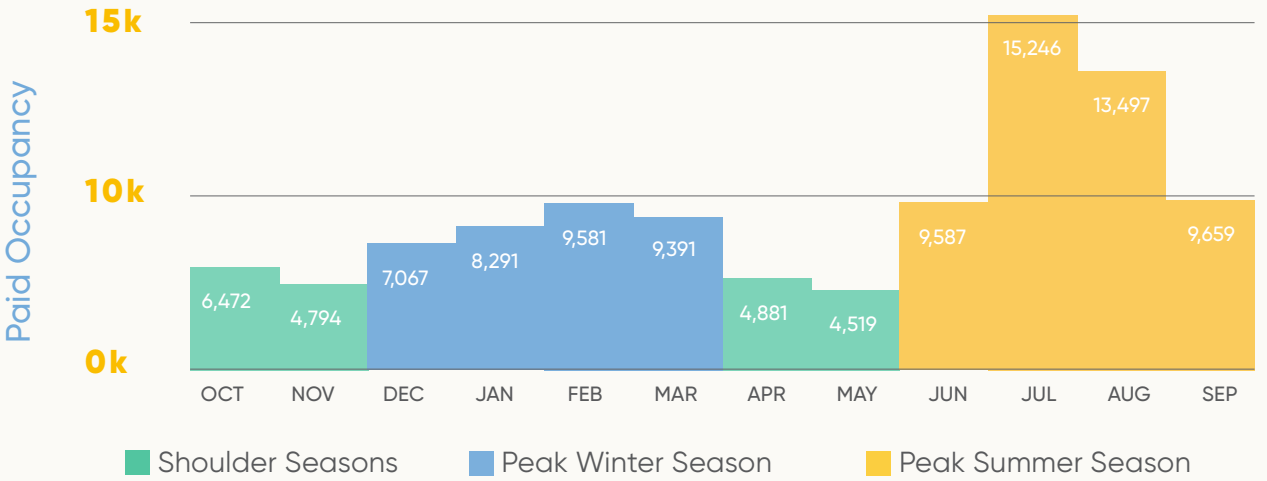
- We are seeing increased visitation from members of Generation Z and Millennials, alongside proportionate declines in the "Silent Generation."
- Visitation continues to increase from markets that added nonstop flights to Sun Valley, including San Francisco and Denver.
- A growing share of winter visitors have chosen to stay in paid accommodations, while fewer are staying in owned vacation units or with friends and family. Additionally, bookings through rent-by-owner sites like Airbnb and VRBO has increased.
- The number of first-time and repeat visitors has experienced substantial growth. Proportionally, the trend line on first-time versus repeat visitors has stayed relatively flat.
- In winter, there is a growth in the number of visitors arriving for activities other than downhill or Nordic skiing, showcasing the strength of Sun Valley's off-mountain offerings.

GENERATION OF SUN VALLEY RESORT ADULT SKIER/SNOWBOARDER VISITORS 2010/11-2019/20

Overnight visitors only (full-time residents, part-time residents, and day visitors excluded)
Adults aged 18 & older only (children under 18 excluded)



LODGING OCCUPANCY FOR 2018/2019



Data provided by DestiMetrics

FUNDING ASSESSMENT

In the fall of 2018, Visit Sun Valley partnered with The Advisory Group (TAG) to create a fact-based evaluation of the Sun Valley area’s positioning with comparable mountain resort and tourism-dependent communities.

THE RESULTS:

- The Sun Valley area is underperforming compared to other mountain resort destinations, especially in the prime winter and shoulder season months.
- Our resort area has lower taxes and significantly lower taxable revenues due to lower occupancy and a smaller bed base.
- The State of Idaho has a 2% bed tax that provides grants to support the promotional efforts or other related services that benefit the tourism industry. Otherwise, Idaho law provides for very limited revenue-based taxes at the local or regional level, unlike many of the states where Sun Valley’s competitors are located.
- Sun Valley lacks established horizontal communications or organizational structure for representing tourism as an industry.

// THE WOOD RIVER VALLEY TOURISM COALITION WAS CREATED WITH THE GOAL OF IDENTIFYING AND PURSUING MORE STABLE ALTERNATIVE SOURCES OF INCOME."

THE OUTCOMES:

- Visit Sun Valley, and many of the region’s tourism-dependent businesses and associations are interested in developing a self-sustaining and permanent funding mechanism to promote our Valley’s assets and amenities.
- A Wood River Valley Tourism Coalition is in the first stages of creation. This group aims to organize itself into a campaign funding coalition with the intent to explore a long term, stable funding plan, and to vet all available options within the structure of Idaho State Law.
- Additional support for the Coalition comes from non-profit economic development organizations like Sun Valley Economic Development and Fly Sun Valley Alliance, the real estate industry through Sun Valley Board of Realtors, business organizations such as the Sun Valley Lodging Association and a wide range of local business sectors including retail, restaurants, communications, transportation, events, outdoor recreation, and the arts.



OUTERBIKE

In June 2019, Visit Sun Valley hosted Outerbike at the Sun Valley Resort. Outerbike is known as one of the best bike demos in the North America.

VENUE

River Run Parking Lot, Sun Valley Resort

TRAILS

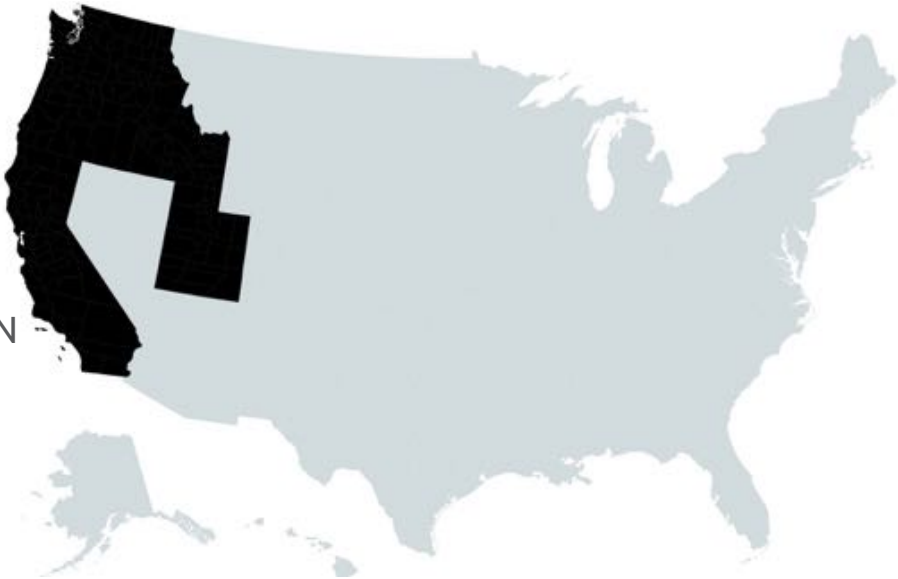
Bald Mountain, Adam’s Gulch, Greenhorn, and more

346

ATTENDEES

TOP STATES

CALIFORNIA, IDAHO, OREGON
UTAH & WASHINGTON



//

BEST BIKE
DEMO IN THE
UNIVERSE."



22+

BIKE VENDORS

LOCAL VENDORS

CLUB RIDE APPAREL, SAWTOOTH BREWERY
SYNC VANS & WILD RYE



COMING IN MARCH

2022

MOUNTAIN TRAVEL SYMPOSIUM

The Mountain Travel Symposium is the largest and longest running annual gathering of mountain travel professionals in the world. More than 1,000 representatives from 35+ countries attend to establish relationships, build their businesses, pursue professional development and create a stronger mountain community.

Visit Sun Valley will host the Mountain Travel Symposium in March 2022.



MARKETING & ADVERTISING

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36	Fall
38	Results

MARKETING & ADVERTISING

Over the past year, we have continued the *What We’re Made Of* marketing campaign. This campaign showcases the unique culture born from Sun Valley’s rich history and the contributions of the people who call it home. We embrace the idea that the trends of the day don’t drive Sun Valley, but instead that our innovators, adventurers, creators, and entrepreneurs define us.

WHAT WE TRACK

We’ve established a set of metrics from a variety of touchpoints. These allow us to set a baseline and measure our year over year performance. Our indicators include:

- Organic Web Sessions to visitsunvalley.com
- Enplanements in to Friedman Memorial Airport (SUN)
- Local Option Tax Collections from the Cities of Ketchum and Sun Valley
- Visit Sun Valley Social Media Followers
- The “Net Promoter Score” provided by the Sun Valley Resort’s Survey
- The Average Daily Lodging Rate
- The Number of Room Nights Sold

MARKETING STRATEGY

Digital media continues to dominate the advertising space. Attention spans are getting shorter, and the platforms that that people use to consume media are becoming broader. We look at a wide range of offerings to deliver the right value to the right audience at the right time. This requires optimizing a suite of assets for specific platforms.

CURRENT ADVERTISING VEHICLES

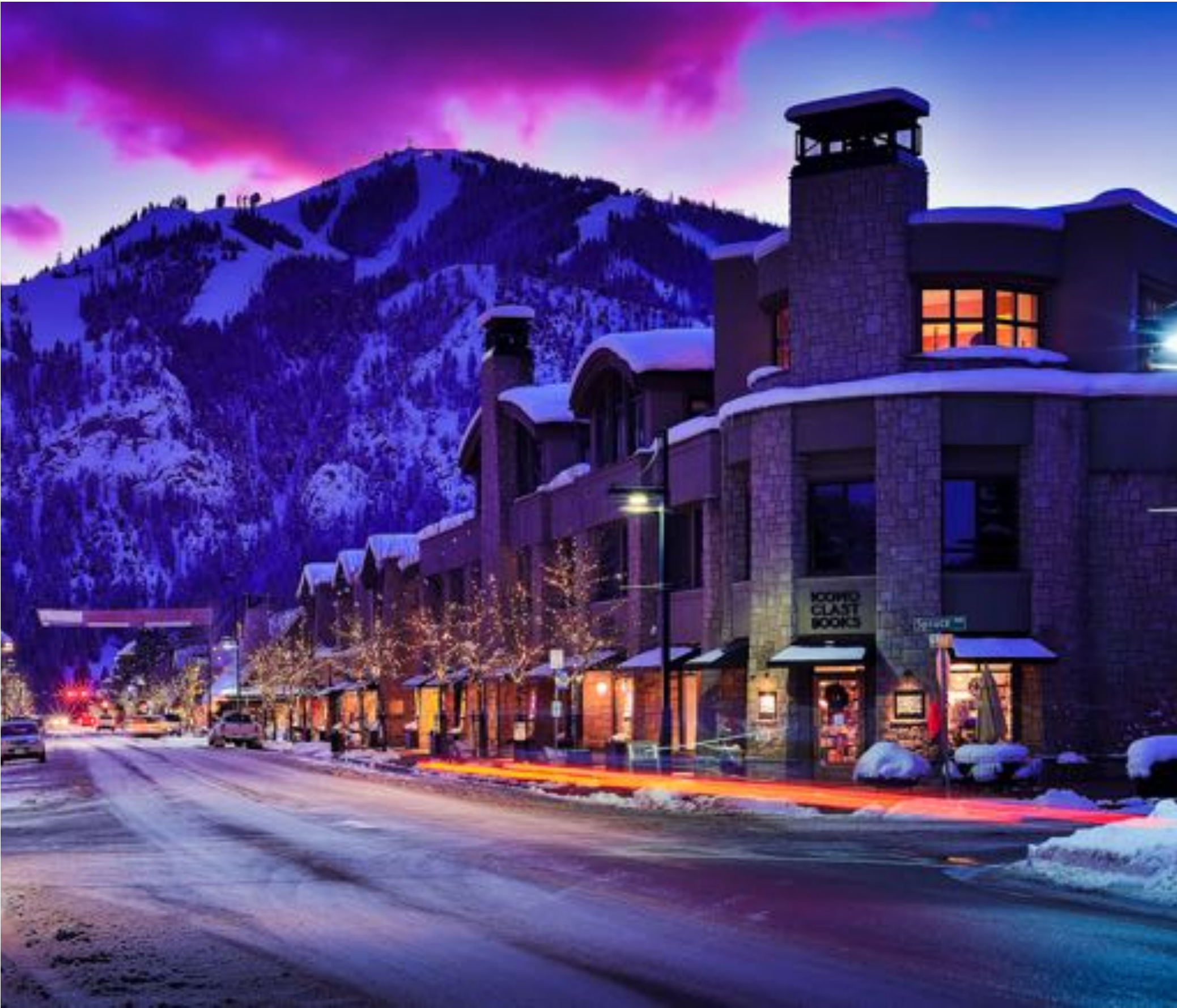
- Videos & Photos
- Display Ads
- Blog Stories

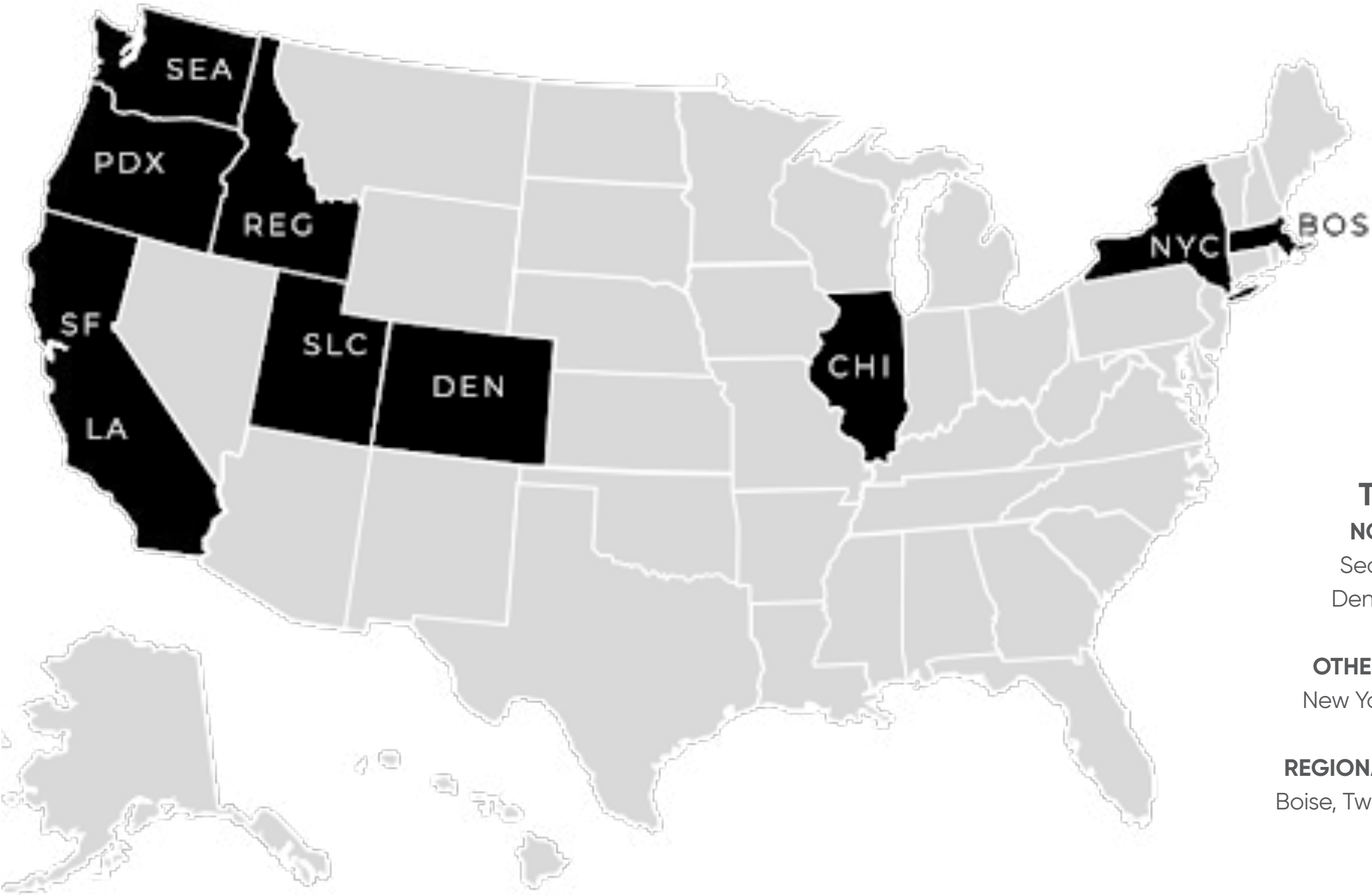
PRIMARY ADVERTISING OUTLETS

- Content Partnerships
- Social Media Platforms
- Connected TV
- Digital Streaming Music Services
- Podcasts Influencers



TO RAISE AWARENESS OF SUN VALLEY AND INFLUENCE CONSUMERS IN AN EFFORT TO SUSTAINABLY INCREASE VISITATION FROM OUR TARGET MARKETS AND VALUED GUESTS."





YEAR-ROUND MESSAGING

Our primary messaging leans on the fundamental findings from our Place Branding session, along with additional segmented opportunities.

TARGET AUDIENCE

- Active Fun-Loving Families
- Affluent Outdoorsy Travelers
- Avid Activity Participants
- Culture Seekers

TARGET MARKETS

NON-STOP

Seattle, San Francisco, Los Angeles, Salt Lake City, Denver & Chicago

OTHER NATIONAL

New York, Boston & Portland

REGIONAL

Boise, Twin Falls, Idaho Falls & Salt Lake City



WINTER & SPRING 2018-2019

Sun Valley is known for being a winter destination, yet our visitation is inverse compared to other destination ski resorts. The Christmas holiday fortuitously brings visitors and second homeowners in droves, but they tend to leave immediately following the New Year. January is one of our weakest months for visitation year after year. We see a spike in February due to the President’s Day long weekend, and slowly see increases in March for Spring Break weeks and the Sun Valley Film Festival. There is ample room for growth, and we will continue to put the majority of our advertising dollars into the winter season.

Equally important is cultivating the next generation of youthful skiers as older skiers age out of the sport. Backcountry skiing is the fastest growing sector of winter sports, and we’re fortunate to have an incredible product offering in this space. We leverage this opportunity for growth through a variety of partners.

269,060▲9%

ORGANIC WEB SESSIONS

Nov 1 – April 13

40,573▼5%

ENPLANEMENTS

Nov 1 – April

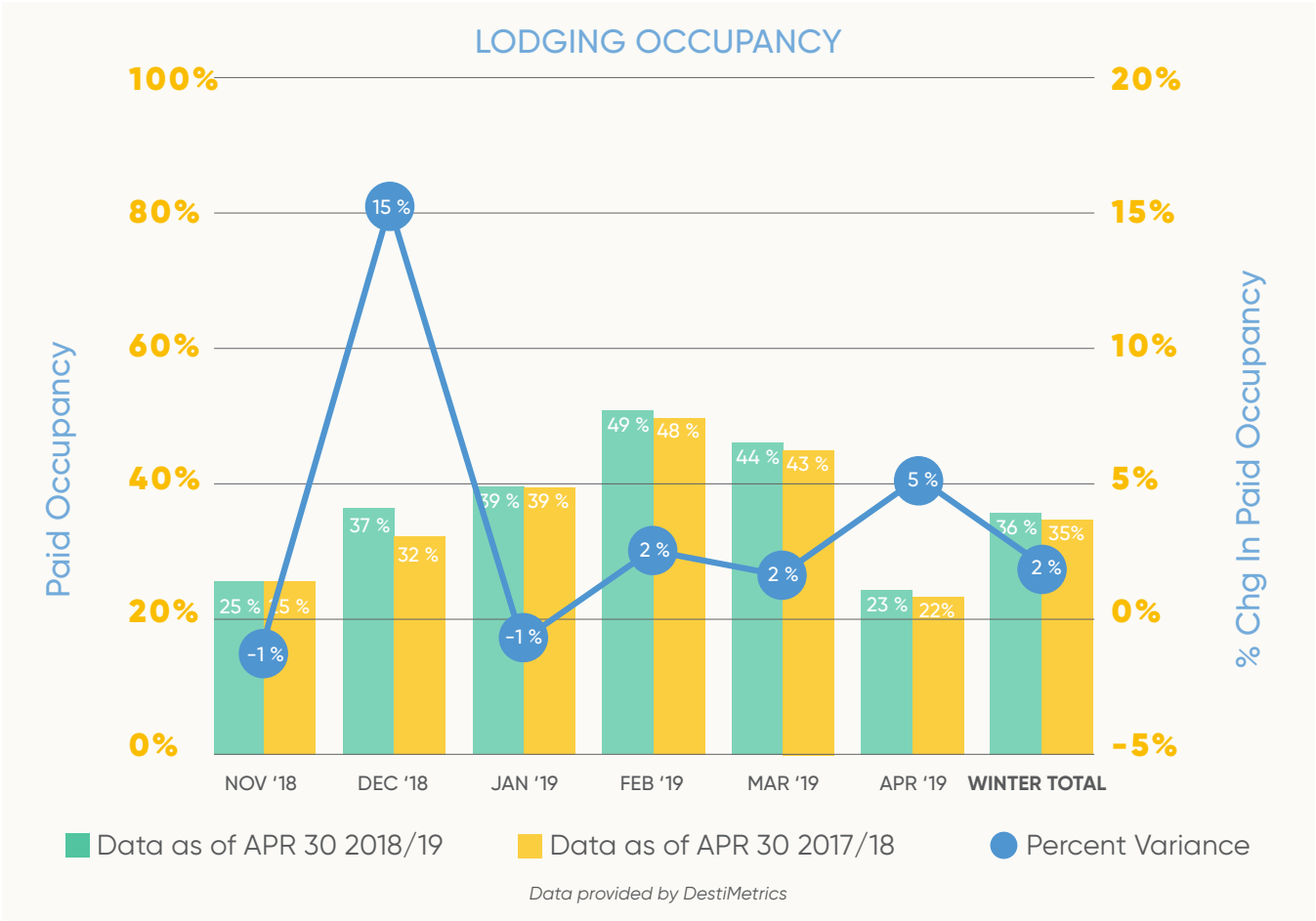
\$1,351,143▲8%

LOT COLLECTION

Nov 1 – April

60+

PR FEATURES & MENTIONS





SUMMER 2019

Summer is the busiest time of year in Sun Valley. We continue to see a compression of events from the end of June through early August, which ultimately pushes visitation to these periods.

We have shifted our ad dollars away from peak summer period and ramped up spending early in mid-April through early June to encourage pre-bookings for the summer. We then taper the spend with a limited “always-on” budget for the remainder of summer.

SUMMER MESSAGING

- Mountain Biking + Outerbike
- Arts & Culture
- Dark Skies
- Wellness

169,549▲21%

ORGANIC WEB SESSIONS

May – Sept

50,945▼2%

ENPLANEMENTS

May – Sept

\$1,329,228▲7%

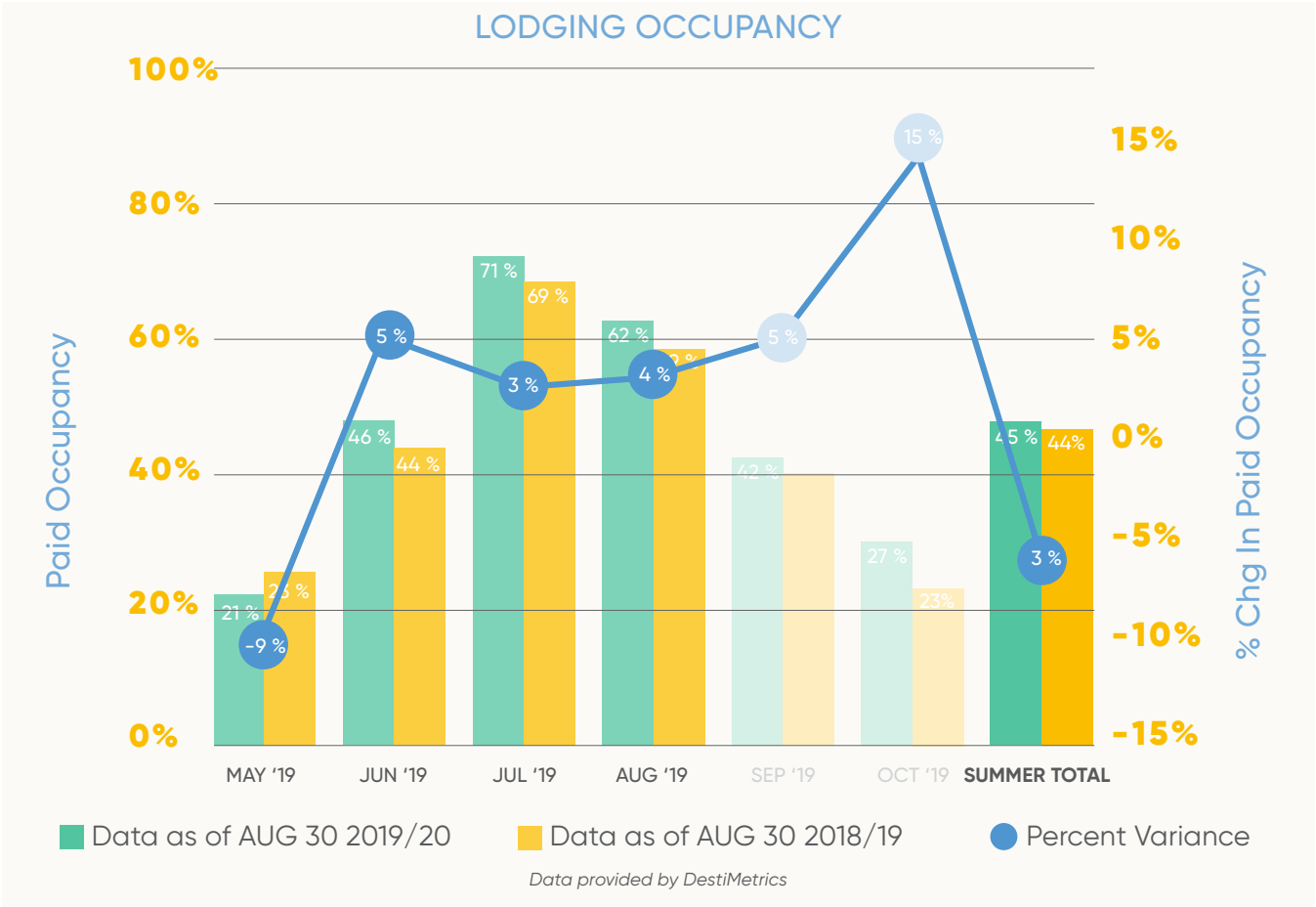
LOT COLLECTION

May – Sept

45+

PR FEATURES & MENTIONS

May – Sept





FALL 2019

We’ve seen continued growth during the fall season, especially the month of September. October and November are opportunities for the Sun Valley area, as they have ample capacity for visitation.

With the decrease in nonstop flights during this period, fall is an ideal time to engage with our regional audience. Lower room rates and “slack specials” create compelling incentives to the last-minute drive markets.

We’ve leveraged our fall messaging to include Sun Valley’s “Secret Season” and “Festival Season” as invitations to potential visitors to check out this otherwise forgotten time of year.

FALL MESSAGING

- Festival Season: Oktoberfest, Trailing of the Sheep, Jazz & Music Festival
- Outdoor Recreation: Mountain Biking, Fly Fishing, Hiking
- Leaf-peeping
- Arts & Culture
- Wellness

76,353

▼9%

ORGANIC WEB SESSIONS

Sept 2 – Nov 1

13,620

▼6%

ENPLANEMENTS

Sept – Oct

\$516,156

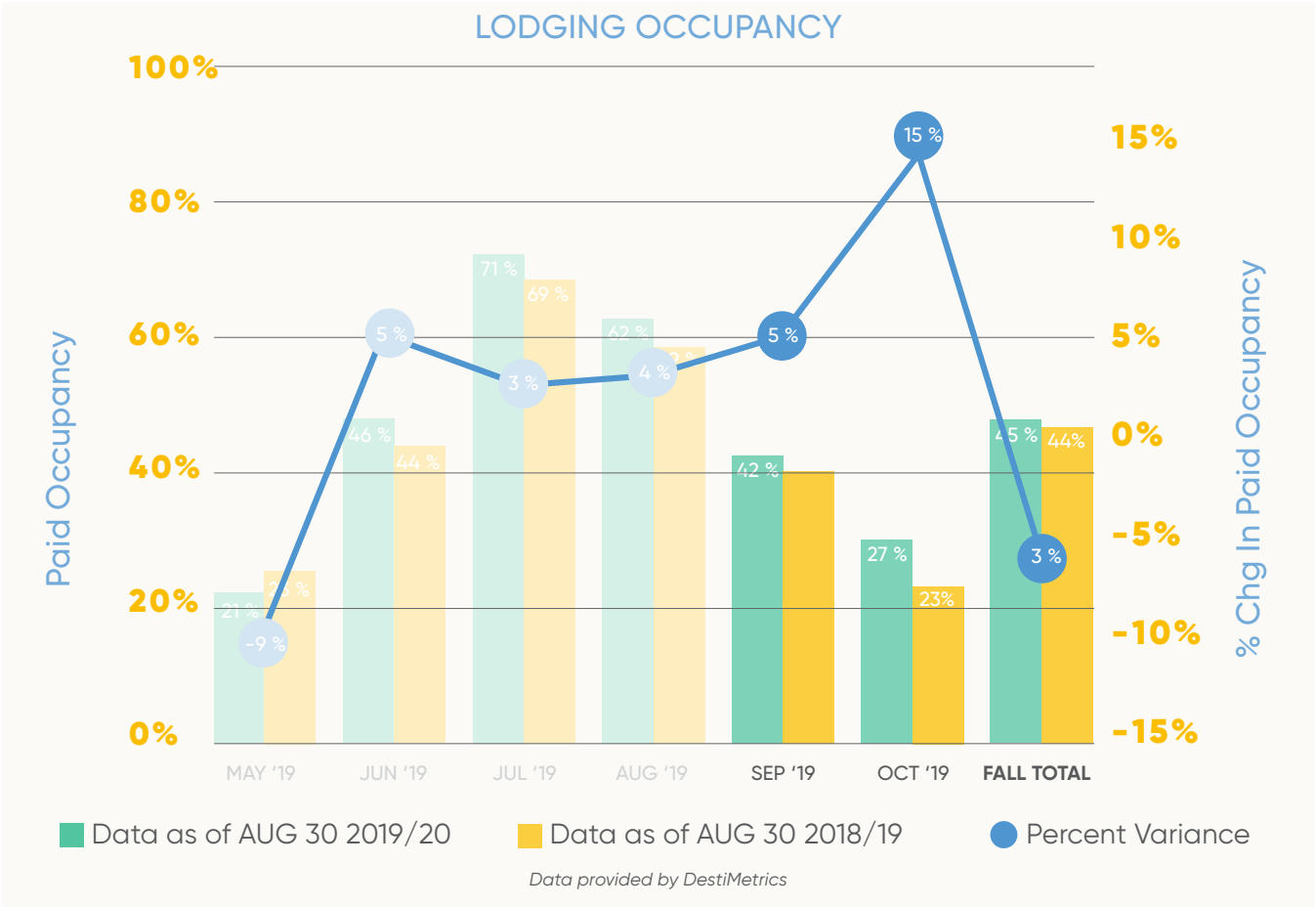
▲1%

LOT COLLECTION

Sept – Oct

10+

PR FEATURES & MENTIONS



TRAVEL TOURISM IN BLAINE COUNTY

\$308 MILLION
TOTAL TRAVEL SPENDING

5,300 JOBS
25% OF BLAINE COUNTY JOBS

\$29.5 MILLION
TAX DOLLARS GENERATED

RESULTS FOR FISCAL YEAR 2019

▲ 28%
ORGANIC WEB SESSIONS

▼ 3%
ENPLANEMENTS

▲ 7%
LOT COLLECTION

+ 2.1K
FACEBOOK FOLLOWERS

+ 3.7K
INSTAGRAM FOLLOWERS

▲ 2.1%
AVERAGE DAILY RATE

▲ 4%
ROOM NIGHTS SOLD

PUBLIC RELATIONS

41 PR Strategy

42 Media Hosting

MEDIA HOSTING & MISSIONS

Hosting media is a top priority for us. We've learned that the best way to convey Sun Valley's secret sauce is to have people experience the area firsthand. More often than not, journalists experiencing Sun Valley walk away with multiple stories that they hadn't planned. They also tend to leave with a yearning to venture back. We work in collaboration with numerous partners in town, ranging from restaurants and lodging to guides and ambassadors. These allow us to offer well-rounded experiences for incoming journalists.

MEDIA MISSIONS

- New York
- Seattle
- Boise
- Salt Lake City
- We hosted our first international tour operator familiarization trip to Sun Valley in conjunction with a variety of local partners.

100+

MENTIONS & FEATURES COVERING
THE GREATER SUN VALLEY AREA



// SICK OF THE HEAT? HERE'S WHERE YOU CAN FIND
A COOL FAMILY VACATION IN SUMMER"

The
New York
Times

// 5 PLACES TO VISIT IN KETCHUM, IDAHO"

SFGATE

// 10 STELLAR PLACES FOR STARGAZING"

MEN'S JOURNAL

// THE 20 BEST MOUNTAIN TOWNS IN AMERICA"

Sunset

// SUN VALLEY JUST BECAME OUR FAVORITE
DESTINATION FOR AN ARTS & CULTURE GETAWAY"

TRAVEL+
LEISURE

// THE BEST PLACES TO TRAVEL IN OCTOBER"



// 10 PERFECT WAYS TO COOL OFF IN THE U.S."



OPERATIONS

45	Visitor Center
46	Vendors & Creative Services
48	Budget & Funding
50	Our Team

VISITOR CENTER

Visit Sun Valley's Visitor Center uses both technology and personal assistance from paid staff to meet visitor's needs.

VISITOR SERVICES GOALS/OBJECTIVES

- To identify new and innovative ways of meeting visitor needs both before arrival and during their visit to Sun Valley.
- To provide exceptional customer service to all visitors and potential visitors.

365 DAYS A YEAR

OPEN EVERYDAY 9AM - 5PM

DEC 28TH 2018

130 PEOPLE SERVED Winter's highest visitation date

JULY 4TH 2019

159 PEOPLE SERVED Summer's highest visitation date

"AM I IN KETCHUM OR SUN VALLEY?"

"WHERE'S SHOULD WE HIKE/BIKE/CAMP?"

"WHERE SHOULD WE EAT?"

MOST POPULAR QUESTIONS Asked in 2019

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



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 our 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.



BUDGET FISCAL YEAR 2019

Total Income – \$3,109,526

AIR SERVICE LOT FUNDS \$1,770,000		
CITY OF KETCHUM \$440,000	CITY OF SUN VALLEY \$320,000	PRIOR YEAR CARRY OVER \$200,000
IDAHO TRAVEL COUNCIL \$405,526		MEMBERSHIP – \$12,000
		MISC – \$2,000

EXPENSES FISCAL YEAR 2019

Total – \$2,788,000

MARKETING EXPENSE (Advertising, Website + PR) \$2,112,600 76%	OVERHEAD & ADMINISTRATION \$487,200 17%	RESERVES \$188,200 7%
		CREATIVE SERVICES & RESEARCH \$186,000 7%

OUR TEAM

One of our community’s greatest assets is its dynamic citizens. We have assembled a group of highly engaged community leaders and members to provide insight to our organization. The committee expanded this year to receive more outreach and feedback from additional business and nonprofit sectors in the broader Sun Valley community.

Advisory Committee

Gail Severn
Mike Wolter
Shannon Allen
Jim Keating

Jacob Frehling
Ben Bradley
Jen Smith
Eeva Turzian
Heather LaMonica

Deckard
Kim MacPherson
Susan Nieves
Mike Herlinger

Visit Sun Valley Staff



SCOTT FORTNER
Executive Director



RAY GADD
Marketing Manager



ALY SWINDLEY
Community Relations



CLAUDIA MOHR
Visitor Center Agent

Visit Sun Valley Staff

Continued



CRUGER THOMAS
Visitor Center Agent



LLOYD BETTS
Visitor Center Agent



IRENE KOHLI
Visitor Center Agent



BILL COLLINS
Visitor Center Agent

Board of Directors



DIANN CRAVEN
City of Ketchum Representative



TIM SILVA
Sun Valley Company Representative



KRISTIN POOLE
Advisory Committee Representative



OLIN GLENNE
At Large



CANDICE PATE
At Large



CASSIE ABEL
At Large



DAVID SYFERD
City of Sun Valley Representative

We would like to thank Dave Syferd, who had a long history with tourism promotion in Sun Valley; we appreciate his dedication to our board of directors. He had a strong passion for our organization’s mission and enjoyed sharing what the valley had to offer with others.



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