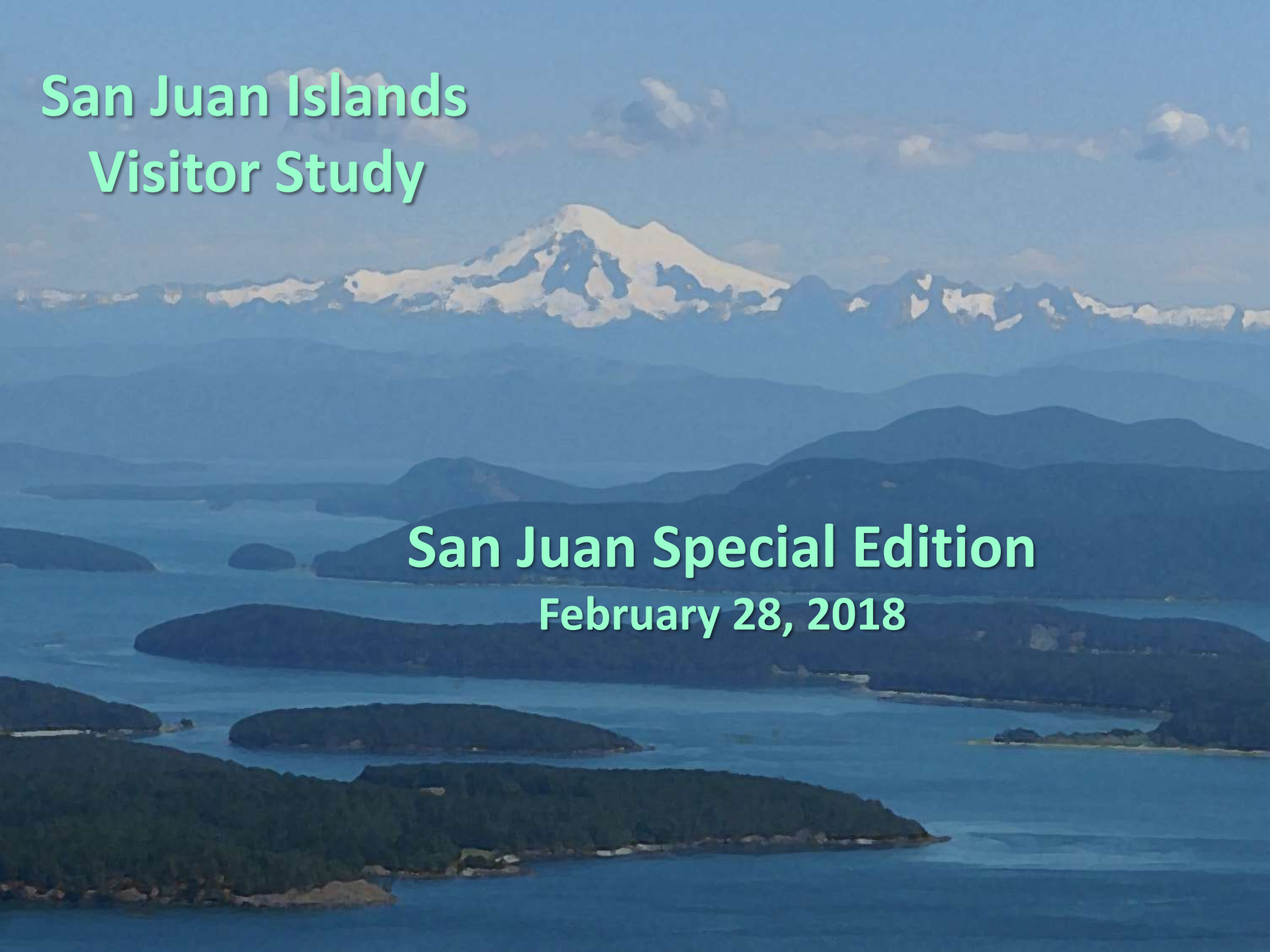

San Juan Islands
Visitor Study
San Juan Special Edition
February 28, 2018

How did we get here?
Where are we heading?

Terrestrial Managers Group
Oct 2016 workshop and 2017 Report
Identify information needs
Conduct study and review findings
Cooperative action planning

Similar projects

Juneau Trails Plan

Yosemite Valley

Colorado River in Grand Canyon

Snake River in Jackson Hole

Tongass NF shore lands– Misty Fjords

Spokane River

Study intentions

Organize existing information
Collect new information – tell you tonight
Make it useful
It's your place – no advocacy
Goal: Good information for all

Overview

Sources of information – overview of study
Getting to the islands
Who are they and what do they want?
Where do they stay?
Where do they go?
Conditions at sites
Support for management actions
Conclusions and overriding themes
Questions

Five main sources of information

1. Use info from WSF and other transportation modes

2. Accommodation Inventory

Basic unit of analysis – how many:
Hotels, campgrounds, & vacation rentals

3. Site counts

People, vehicles boats, bikes on roads
Systematic sampling -- medium to higher use times
Quantify use patterns, averages, and peaks

4. Onsite survey

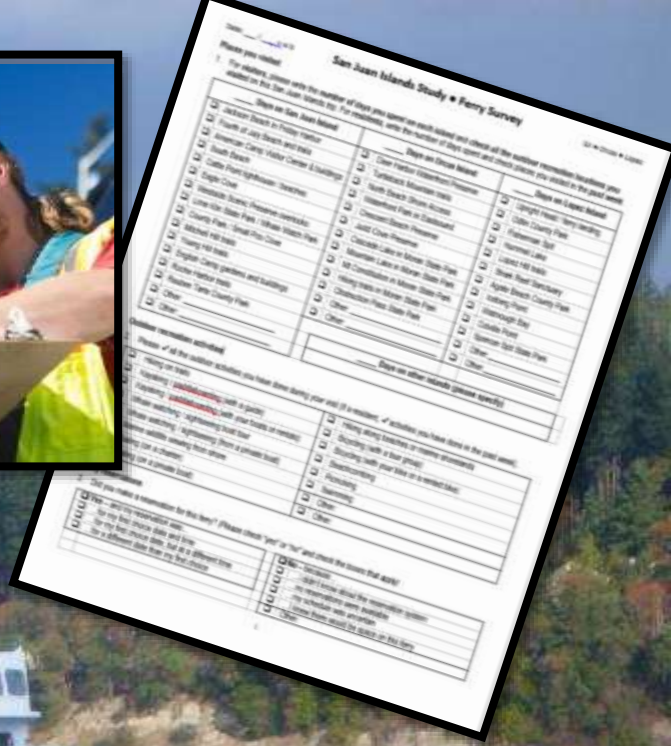
San Juan n = 537

One page

Cattle Point
South Beach
Lime Kiln SP
SJ County Park
Westside Preserve

Sampling
Late May through mid-September
More in mid-summer (75% Jul-Aug)
Morning through early evening
24% before 11; 35% midday; 41% after 2pm

5. Ferry survey



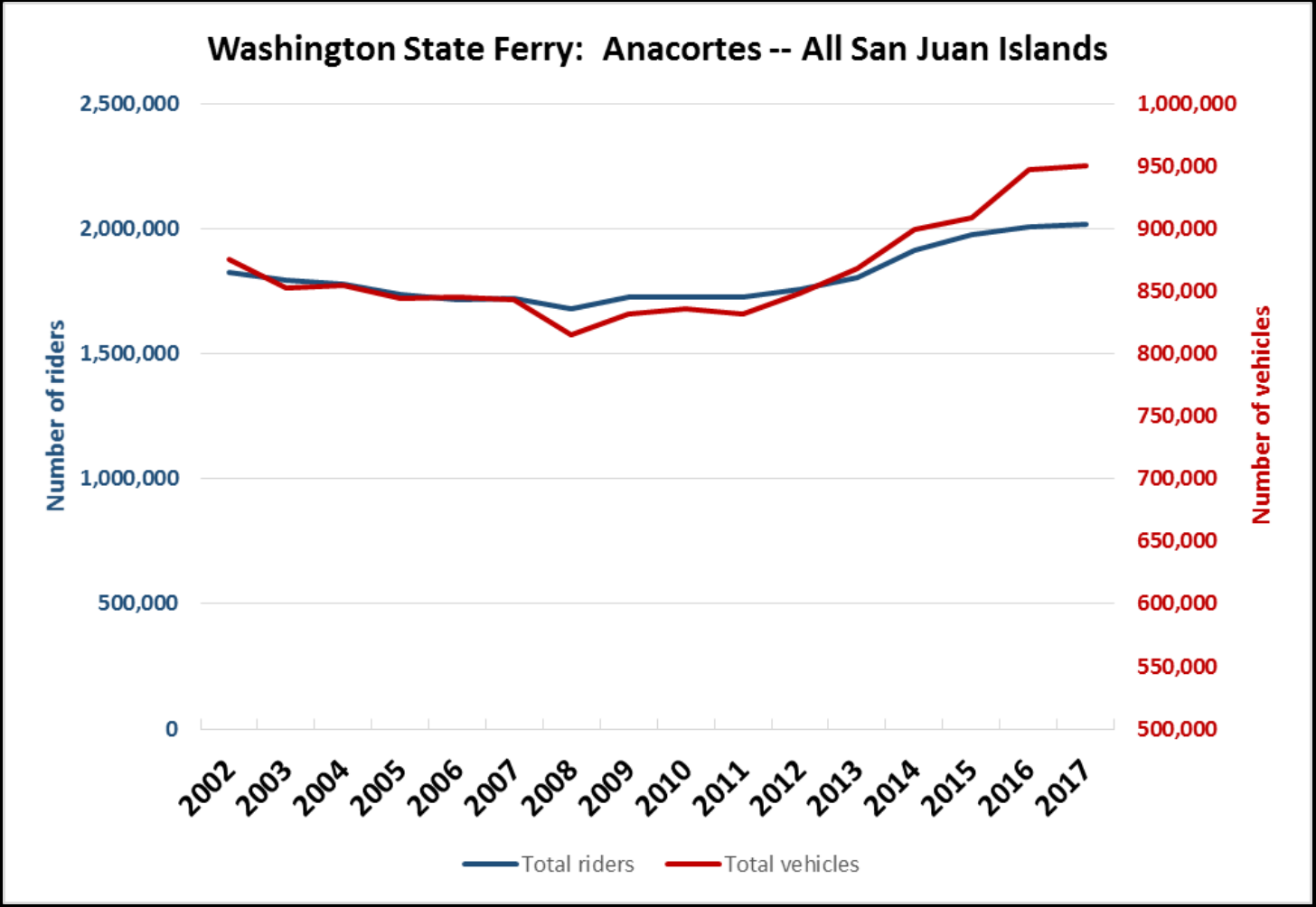
Total 772 ferry passengers – 323 SJI, 219 Orcas, 230 Lopez

631 visitors
141 residents/other

Getting to the islands

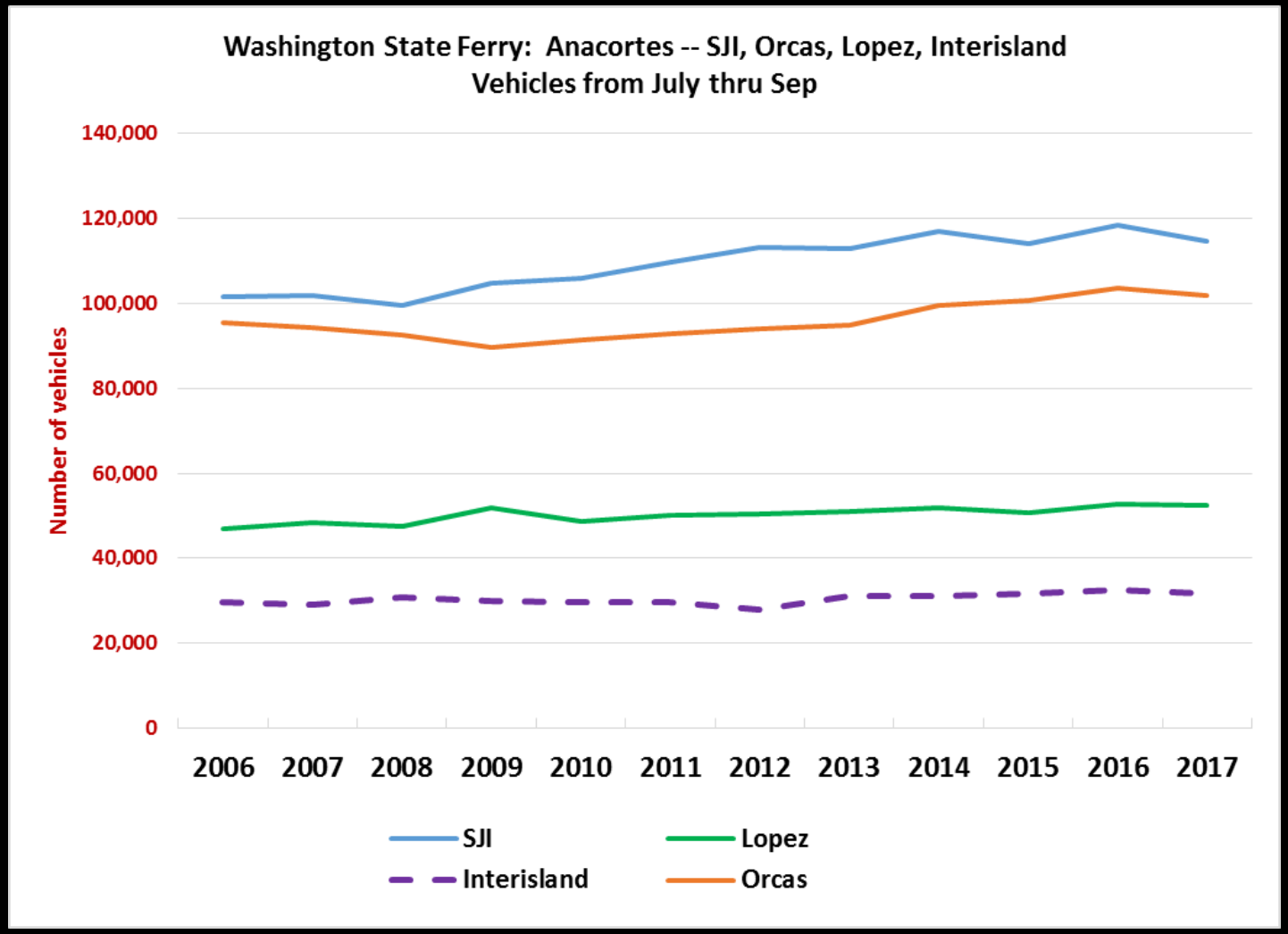
WSF stats , web-information, & interviews

Long term year-round WSF trends – all islands
Riders and vehicles



Steady increase since 2007-08 recession; 2017 similar to 2016

Long term summer WSF vehicle trends by islands

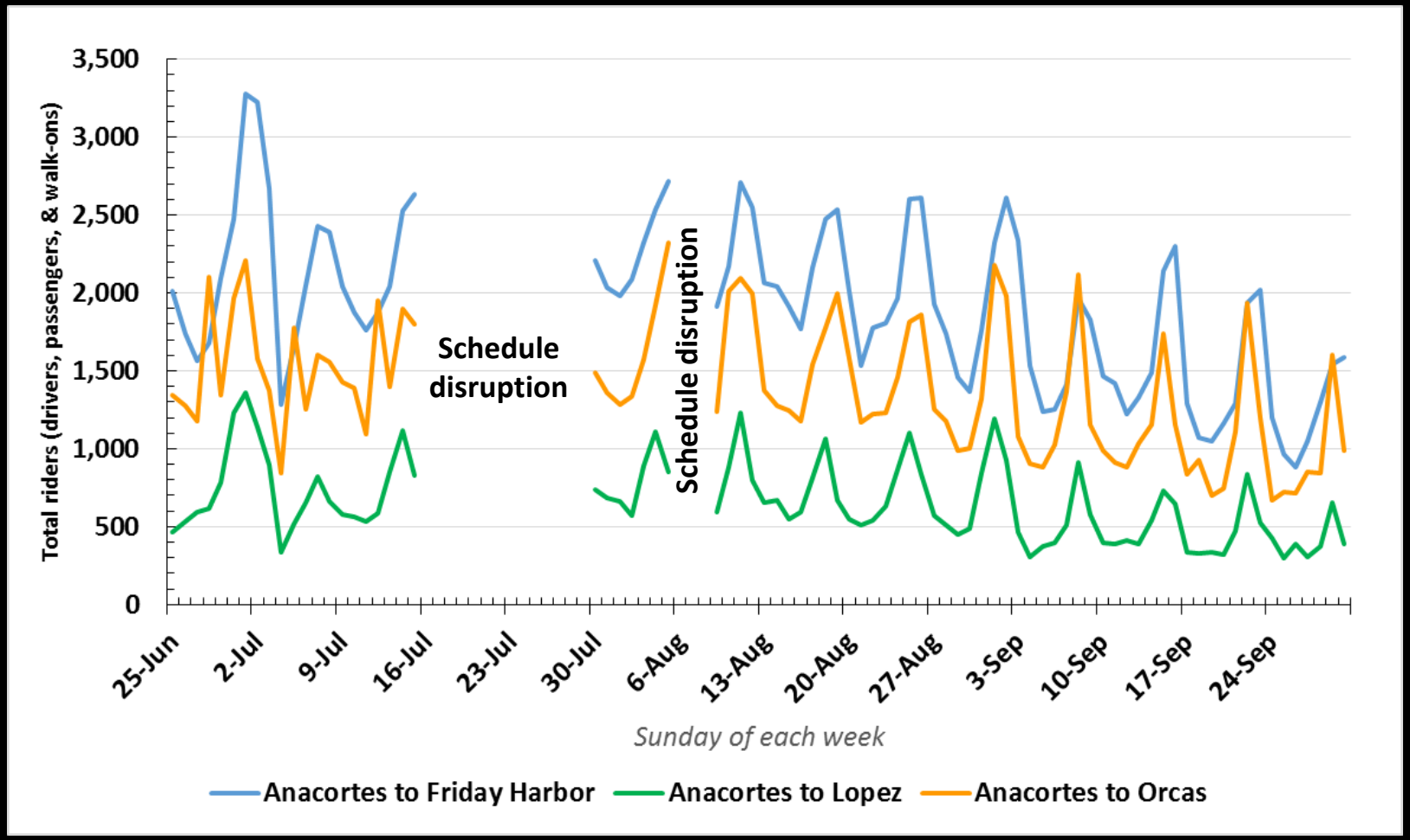


San Juan Island > Orcas > Lopez > Interisland

Summer vehicles lower for 2017 for SJI and Orcas; Lopez steady

Reasons: weather, fire, ferry disruptions in July and early Aug

Daily riders (drivers + passengers + walk-ons) 2017



Summer effect; weekend effect, holiday effect

San Juan Island > Orcas > Lopez

Ferry capacities

Larger		Smaller
144 vehicles	124	64
2,000 passengers	1,200	750

Challenging to estimate

- Shared space on some islands (multiple stops)
- Sailings per day vary
- WSF can fit more/less depending on lengths of “talls”

Per day WSF vehicle capacities by island

Friday Harbor –

- 5 to 6 direct from Anacortes +2-3 via Lopez

Per day capacity: ~900 to 1,100

Orcas –

- 5 from Anacortes + 2 to 3 via Lopez

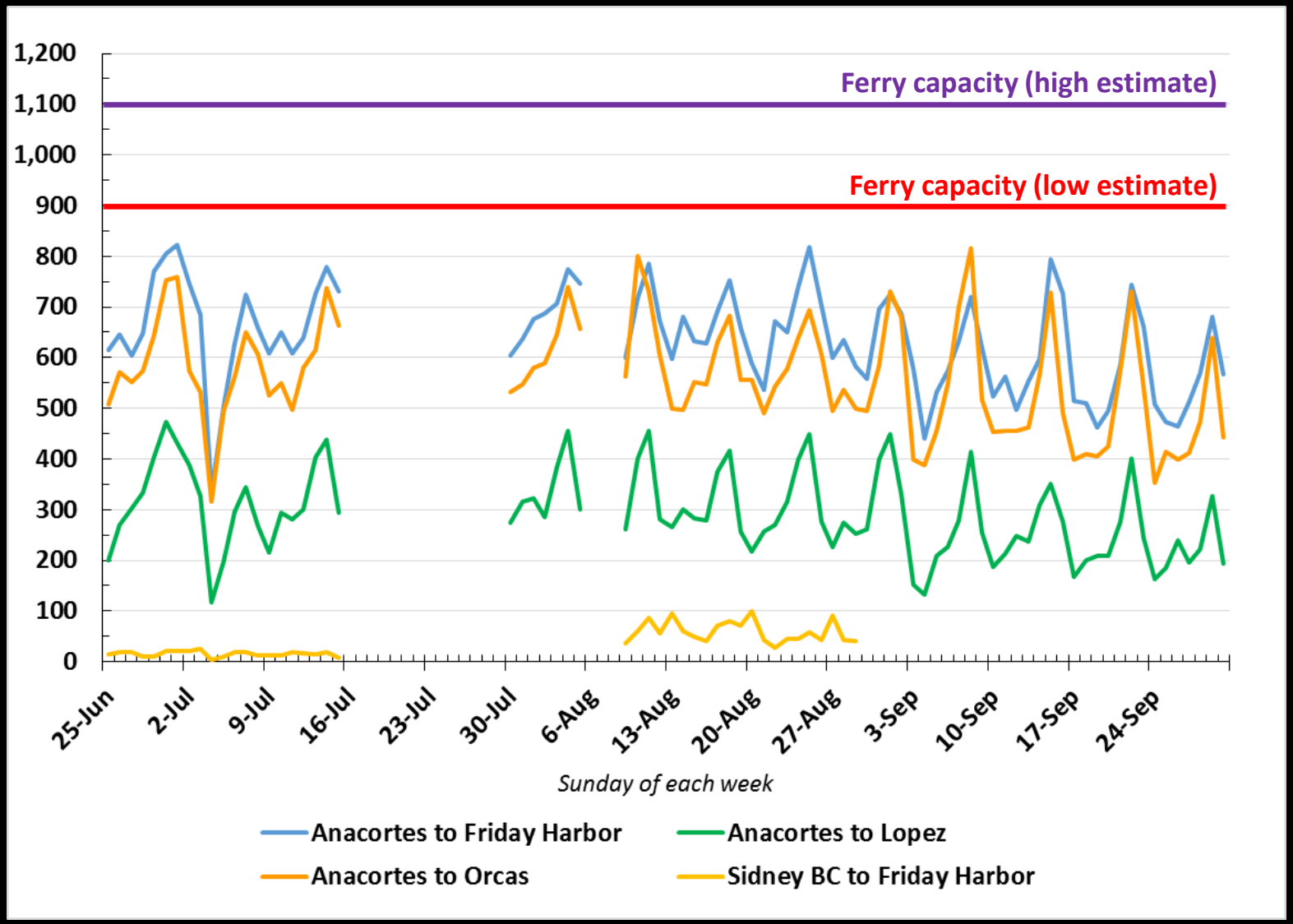
Per day capacity: ~800 to 1,000

Lopez –

- 5 direct from Anacortes + 2 to 3 with

Per day capacity: ~500 to 700

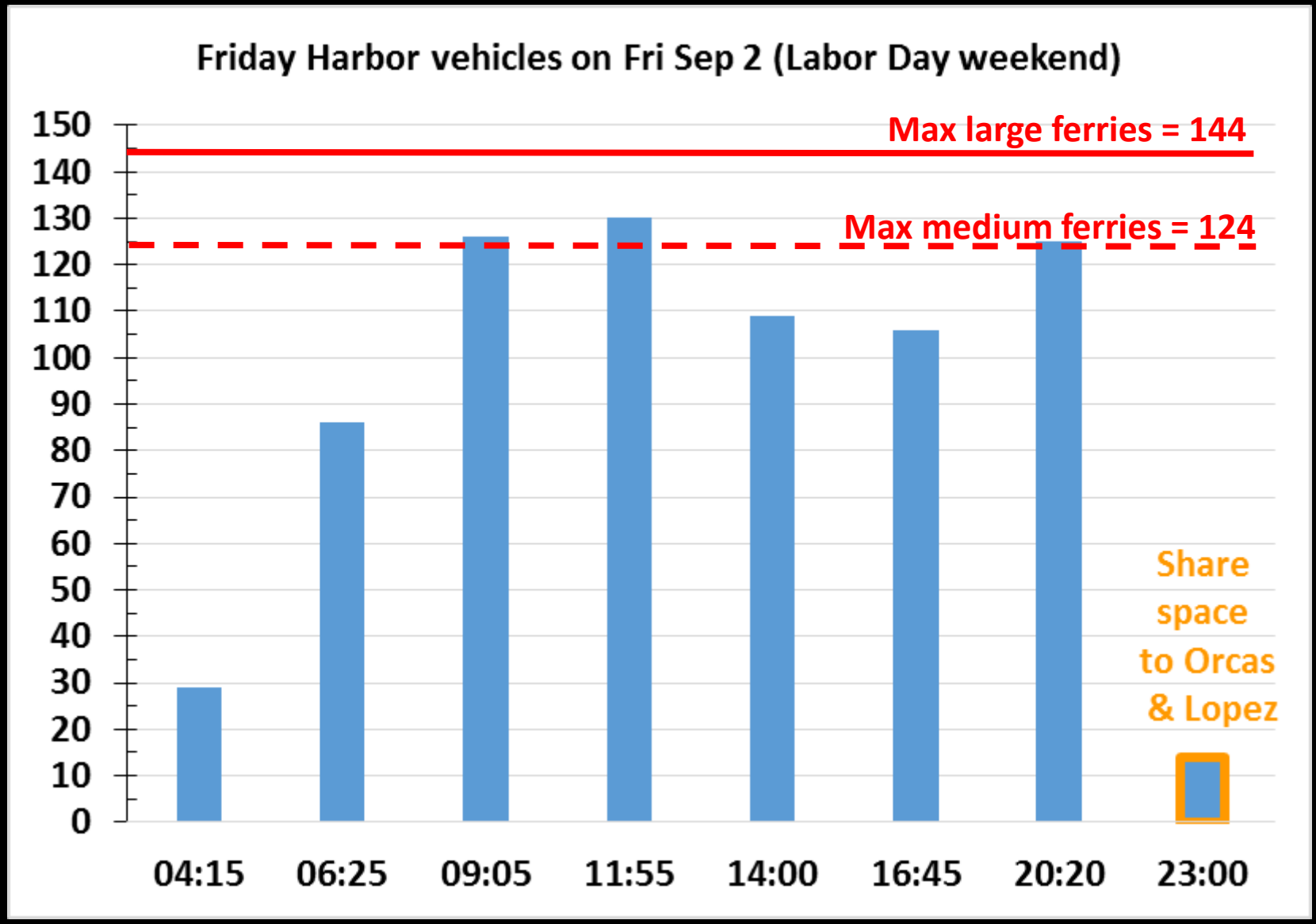
Vehicles per day by island 2017



San Juan and Orcas > Lopez

Consistent weekend peak pattern

Space for vehicles even on busy days



People per vehicle on ferries

Summer 2017 (without walk-ons)

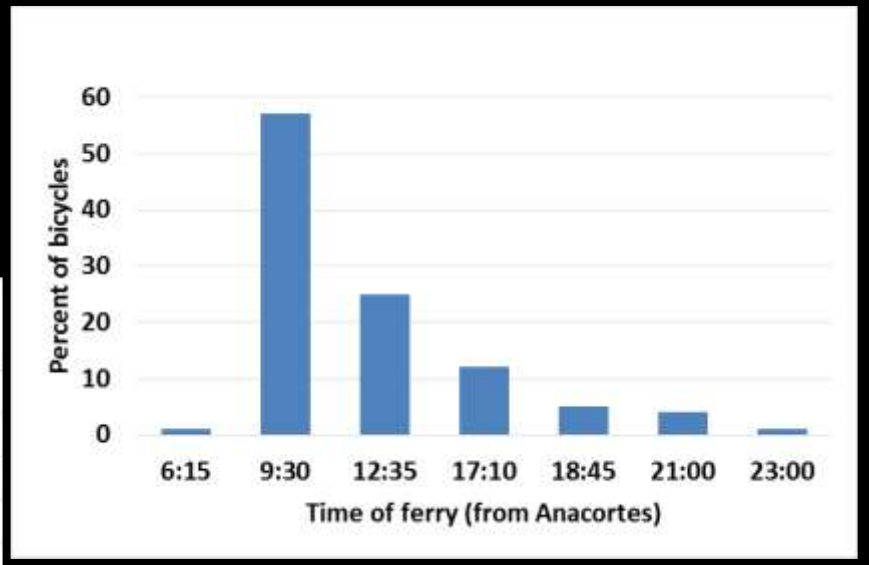
San Juan	2.1
Orcas	2.3
Lopez	1.8

Unused space on ferries for vehicles…and unused space in vehicles

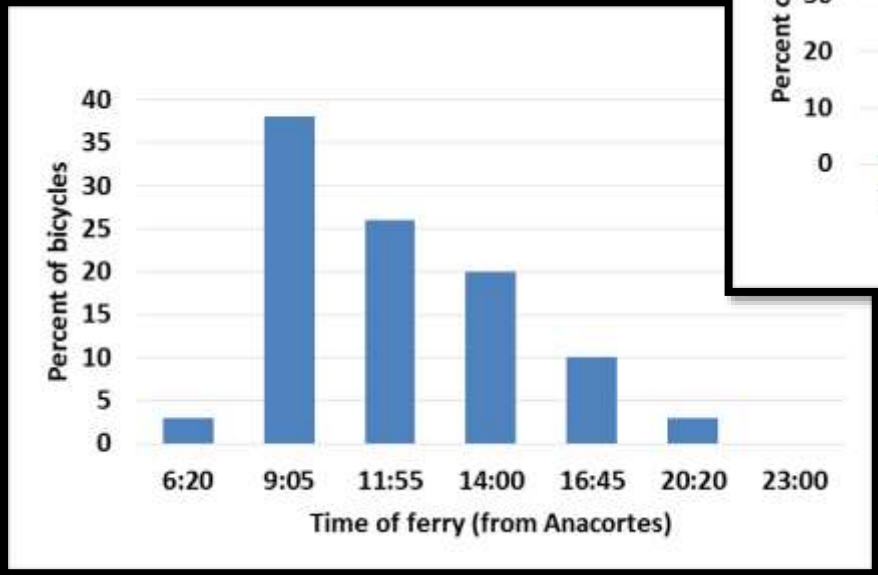
In winter/shoulder, fewer people per vehicle – more visitors with filled cars in summer

Ride-on bicycles: Percent by time of day

Anacortes → Lopez

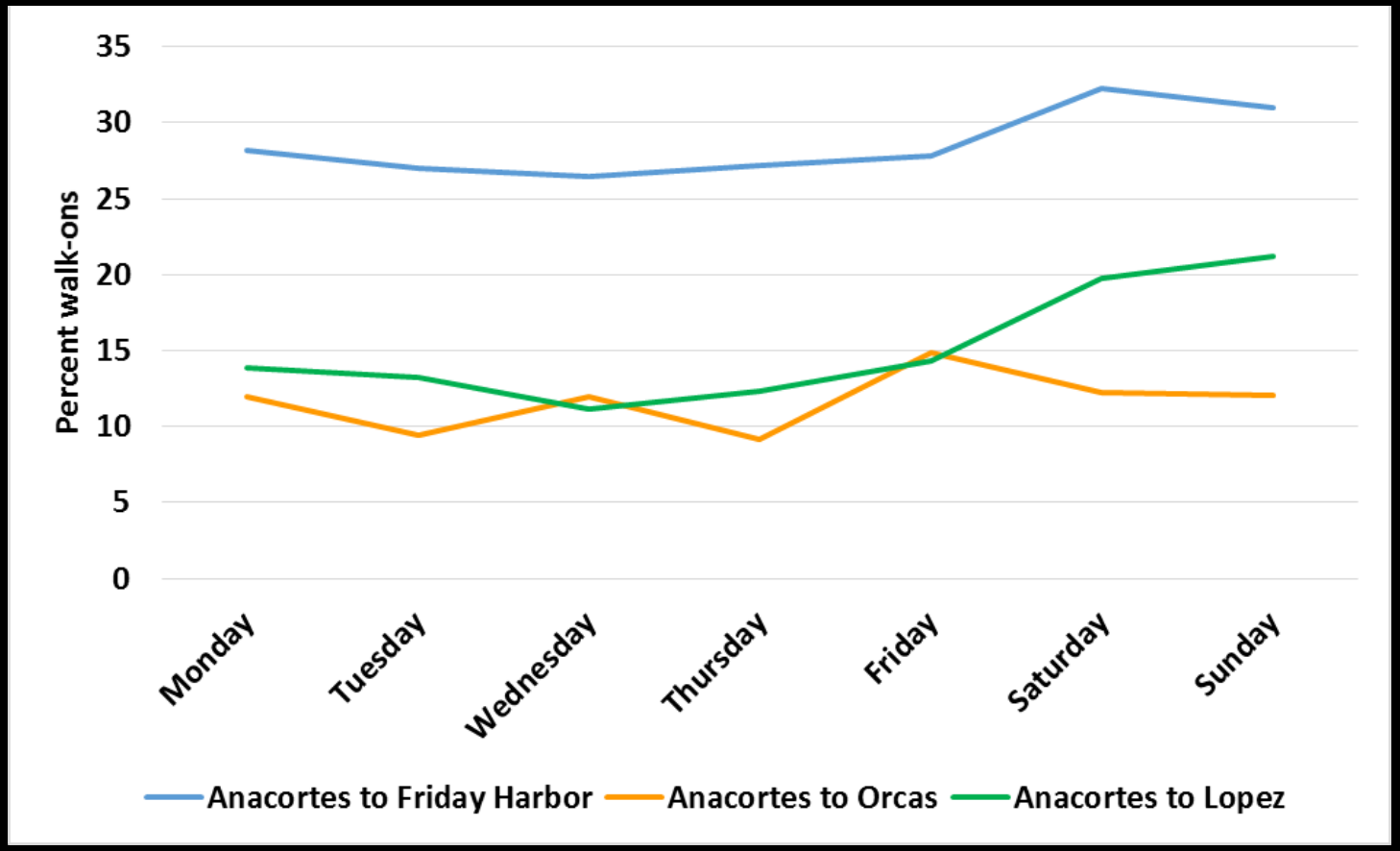


Anacortes → Friday Harbor



2nd morning ferry is most popular; declining numbers through day
With no constraints on reservations – cyclists have their choice of sailings

Percent walk-ons 2017



San Juan > Orcas or Lopez

Proportion of walk-ons builds toward end of the week

Short duration visitors have less need of a car?

Airlines and private planes

150 to 250 pax per day San Juan

50 to 80 ppd Orcas

10 to 30 ppd Lopez

Other passenger ferries

Rough estimate of <150 per day
Clipper holds 200 – but most do not disembark
Other ferries have smaller capacities

Cruise ships

Infrequent day landings
In spring and fall months
About 1-2 days per week
<100 ppd

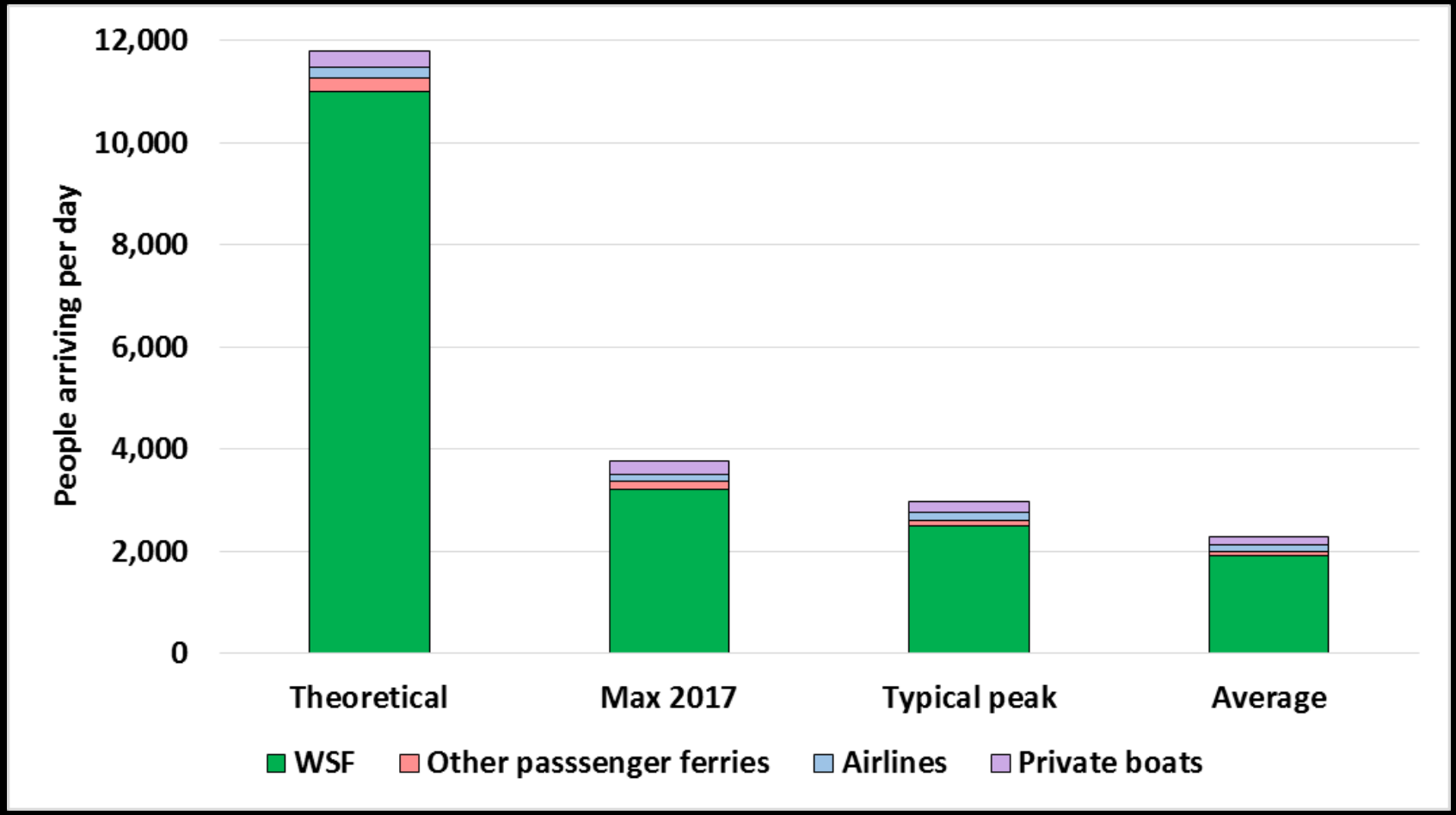
Private boats

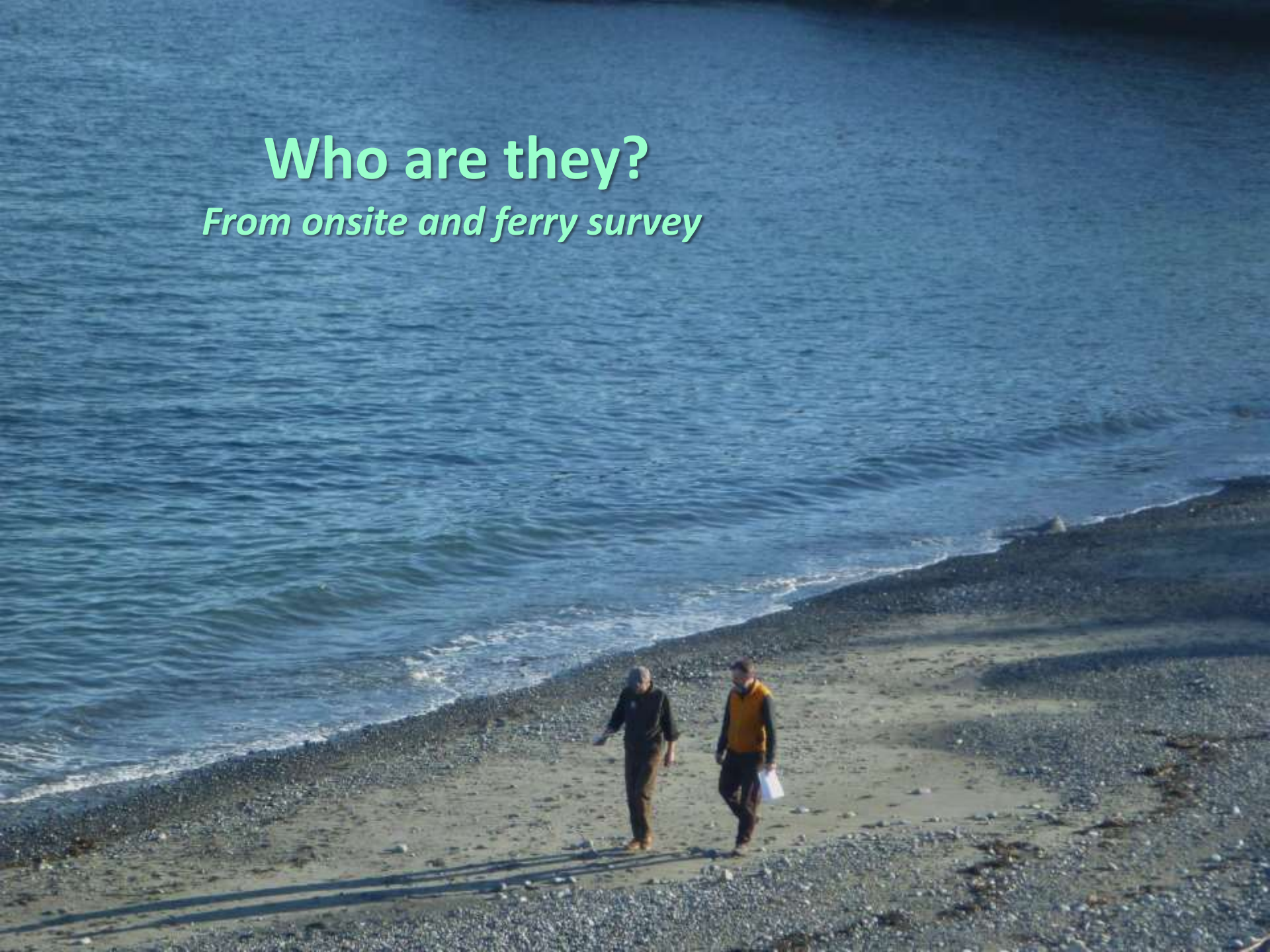
<2000 slips

<30% for cruisers (non-local)

Several use estimate challenges

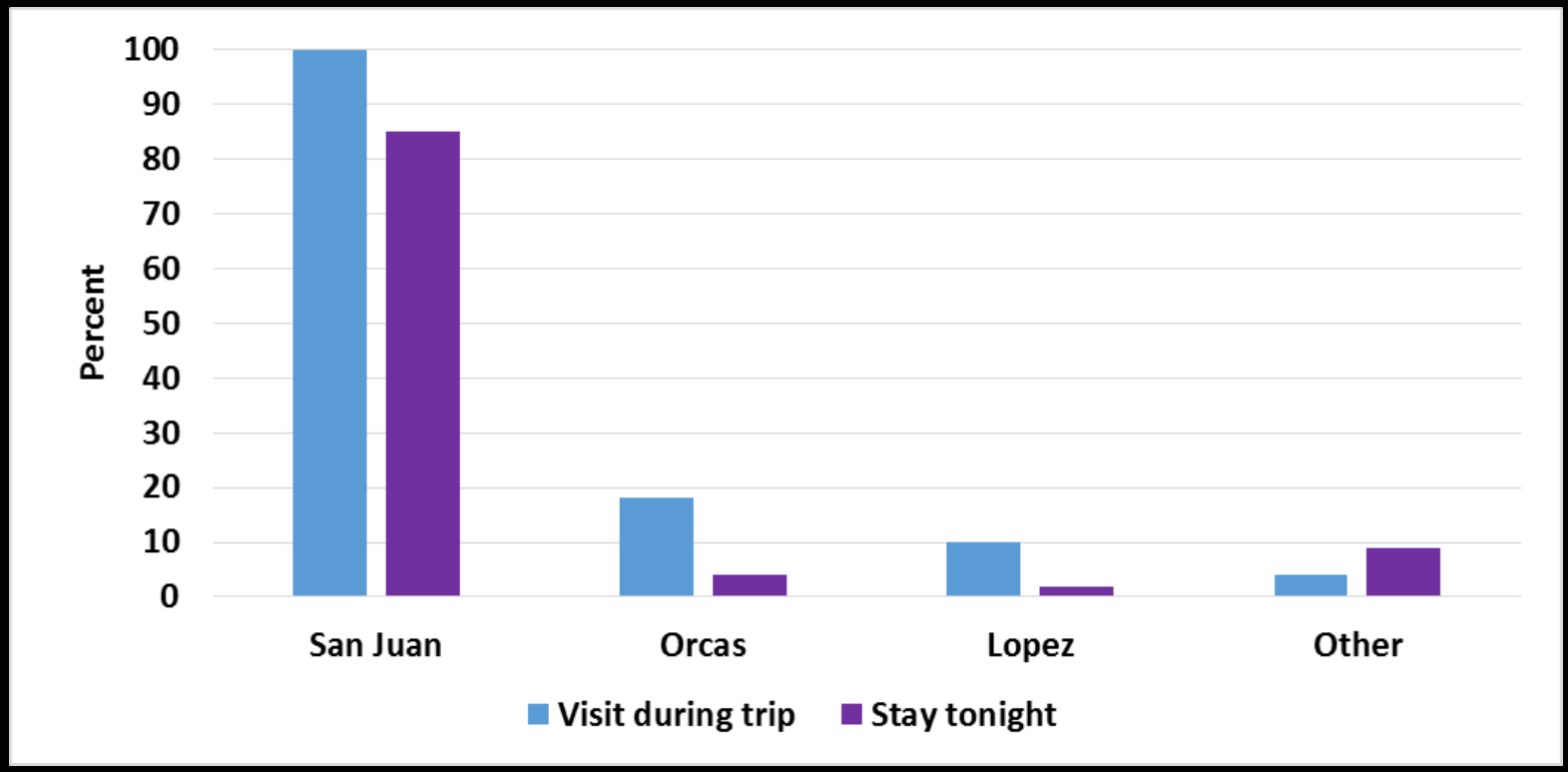
Estimated people per day from all sources (San Juan Island example)




Who are they?
From onsite and ferry survey

Which islands do SJI visitors go to?

From onsite survey

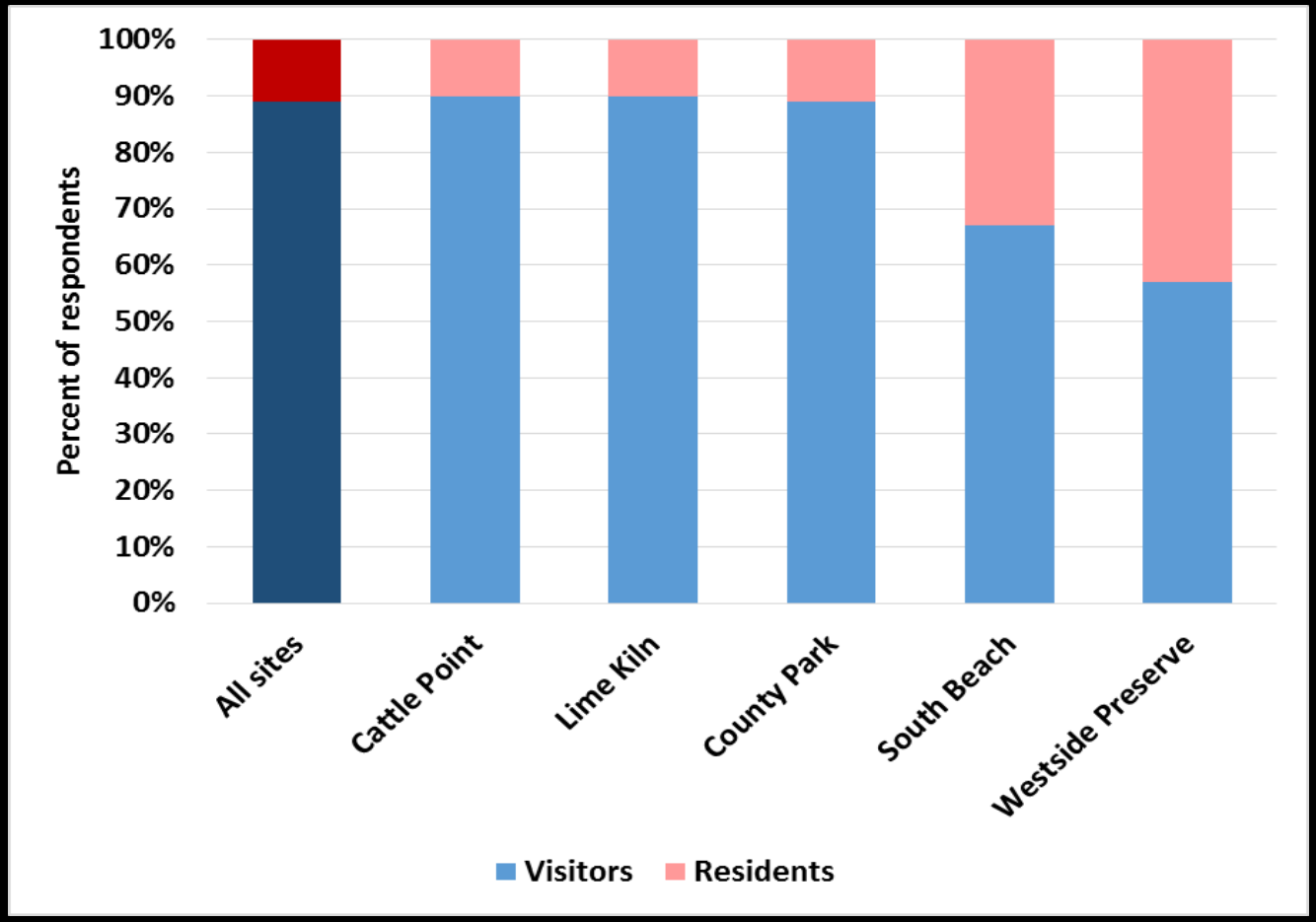


Most stay the night on SJI

About 20% visit Orcas and 5% visit Lopez, but few stay on those islands

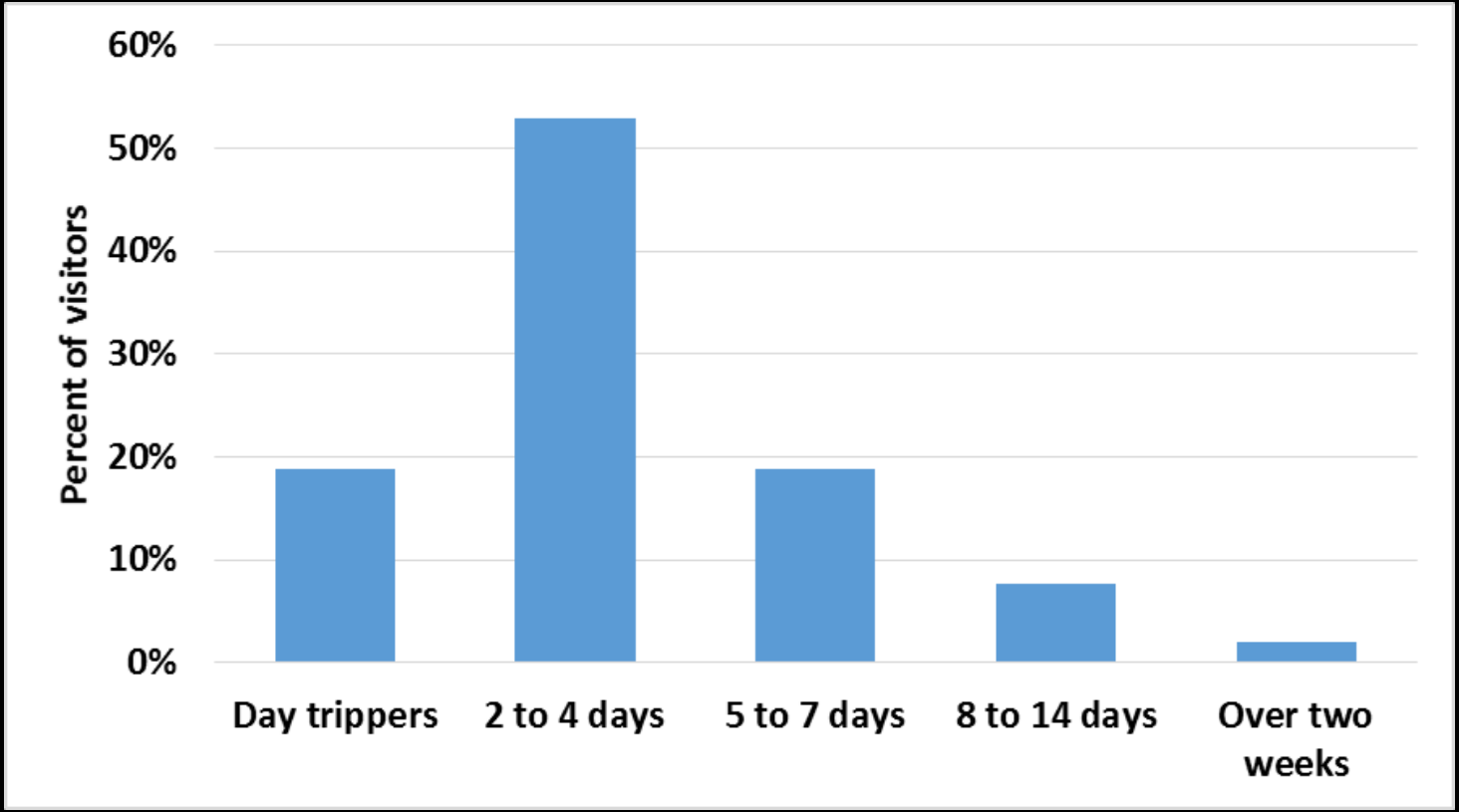
Other overnight locations: leaving for home/mainland; boat

San Juan Island
Percent visitors (n=465) and residents (n=59)



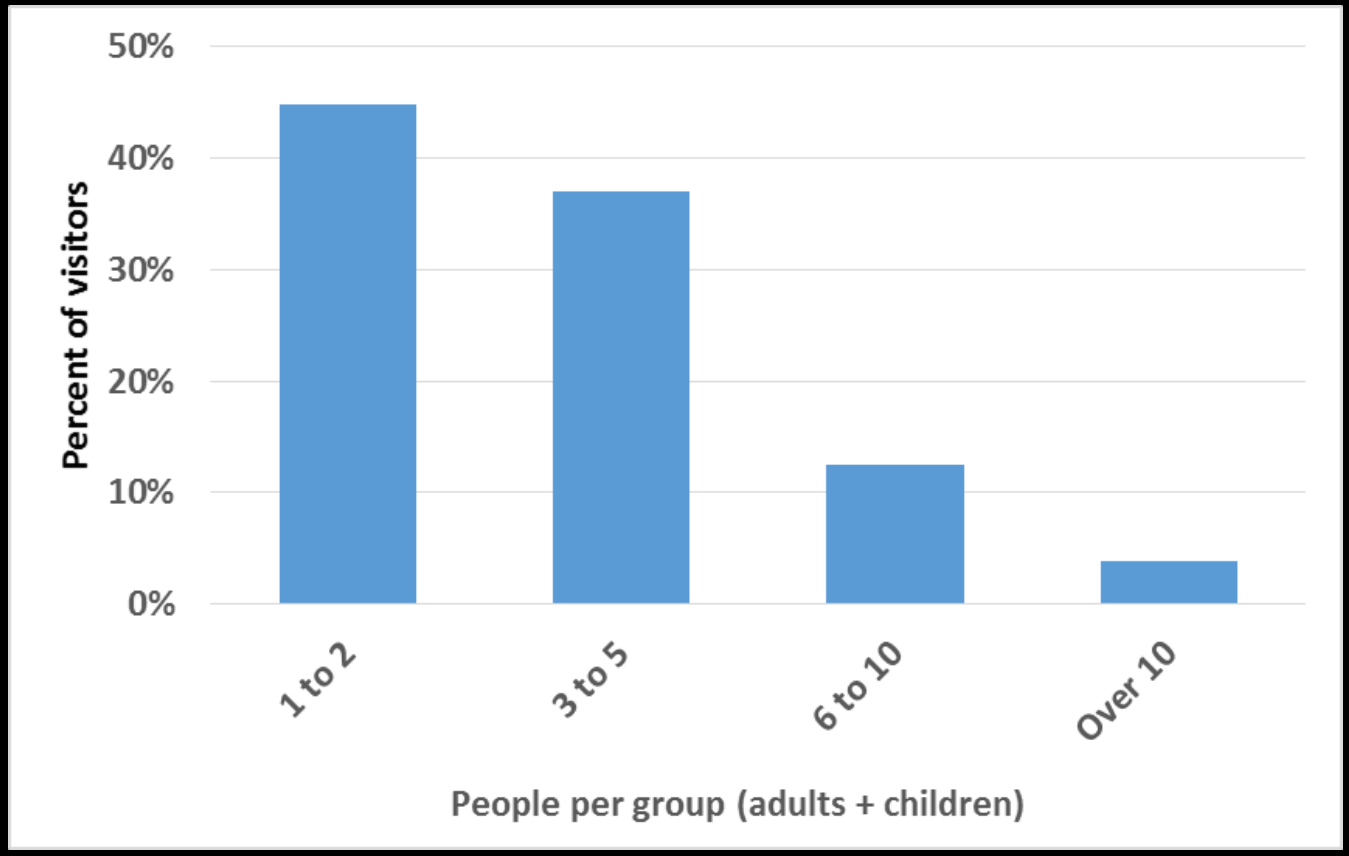
About 9 in 10 people at sites are visitors (higher than other islands)
South Beach and Westside have lower proportions (but small samples)
Higher visitor proportions than Lopez and Orcas (80%)

Visitor length of stay



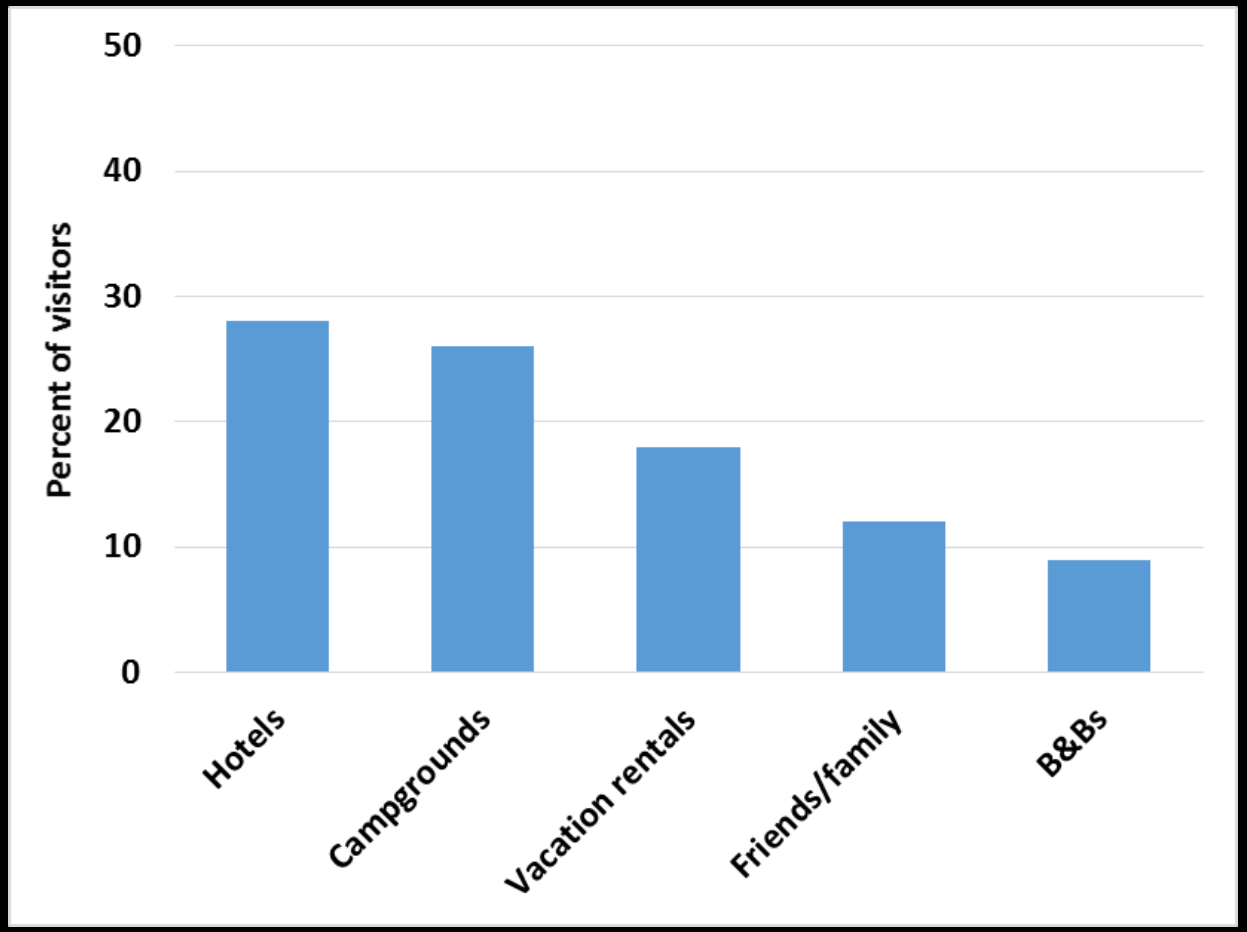
Much more day use than Orcas & Lopez
Median 3.0 days
Majority stay less than a long weekend

Visitor group size



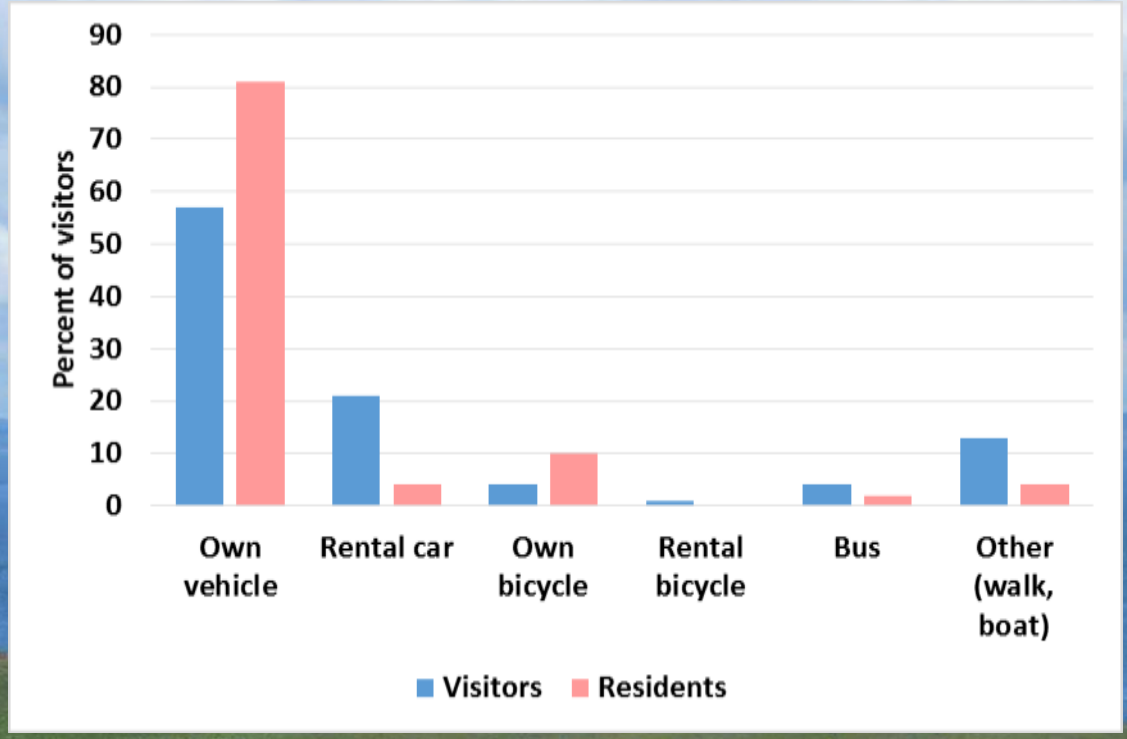
Mostly small groups
Median 3.0; average: 4.1 (similar to other islands)
Largest group: 48 kids + 16 adults; some other groups >16

Visitors' accommodation



More SJI visitors stay in hotels and B&Bs than Orcas and Lopez
Fewer SJI visitors stay with family/friends than Lopez
High campground percentages influenced by County Park sampling

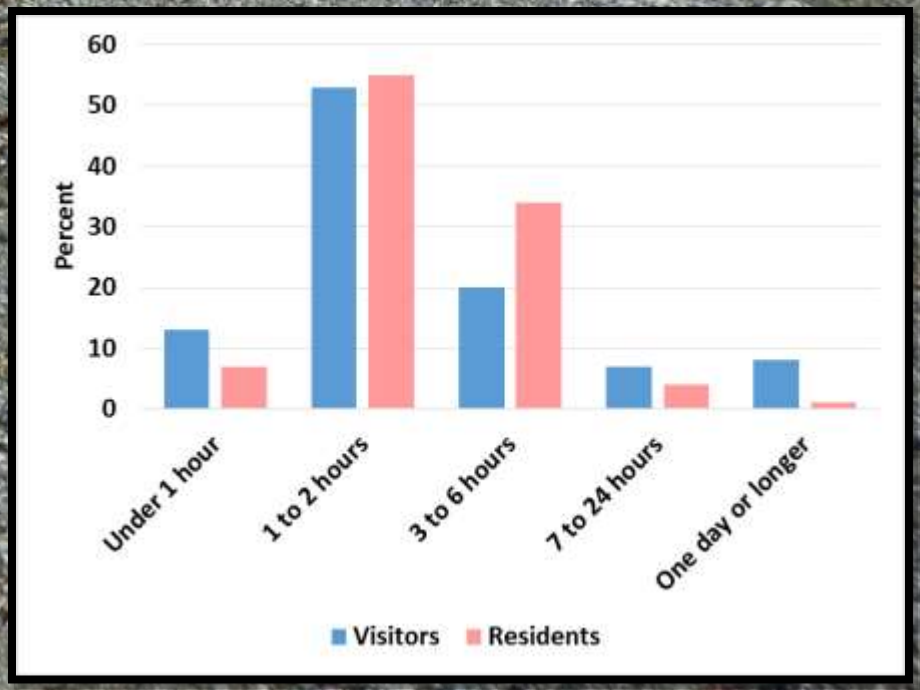
Travel to sites – Visitors and residents



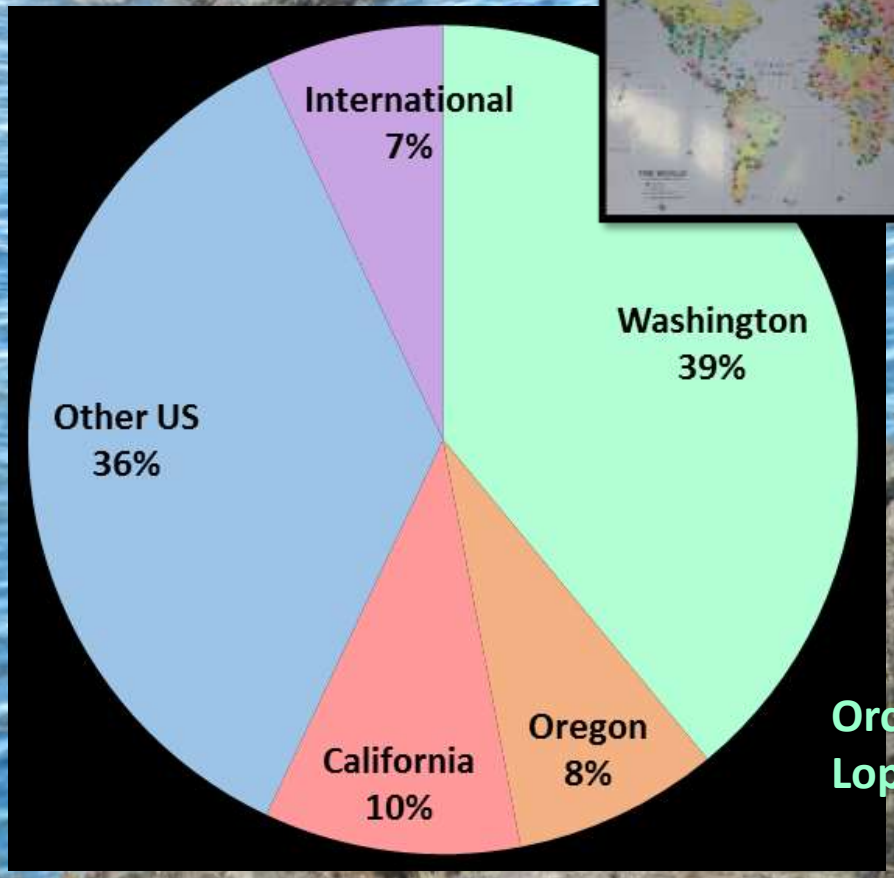
Most drive vehicles – their own or rentals

Residents use bikes more often than other islands

Length of site visit
Visitors and residents

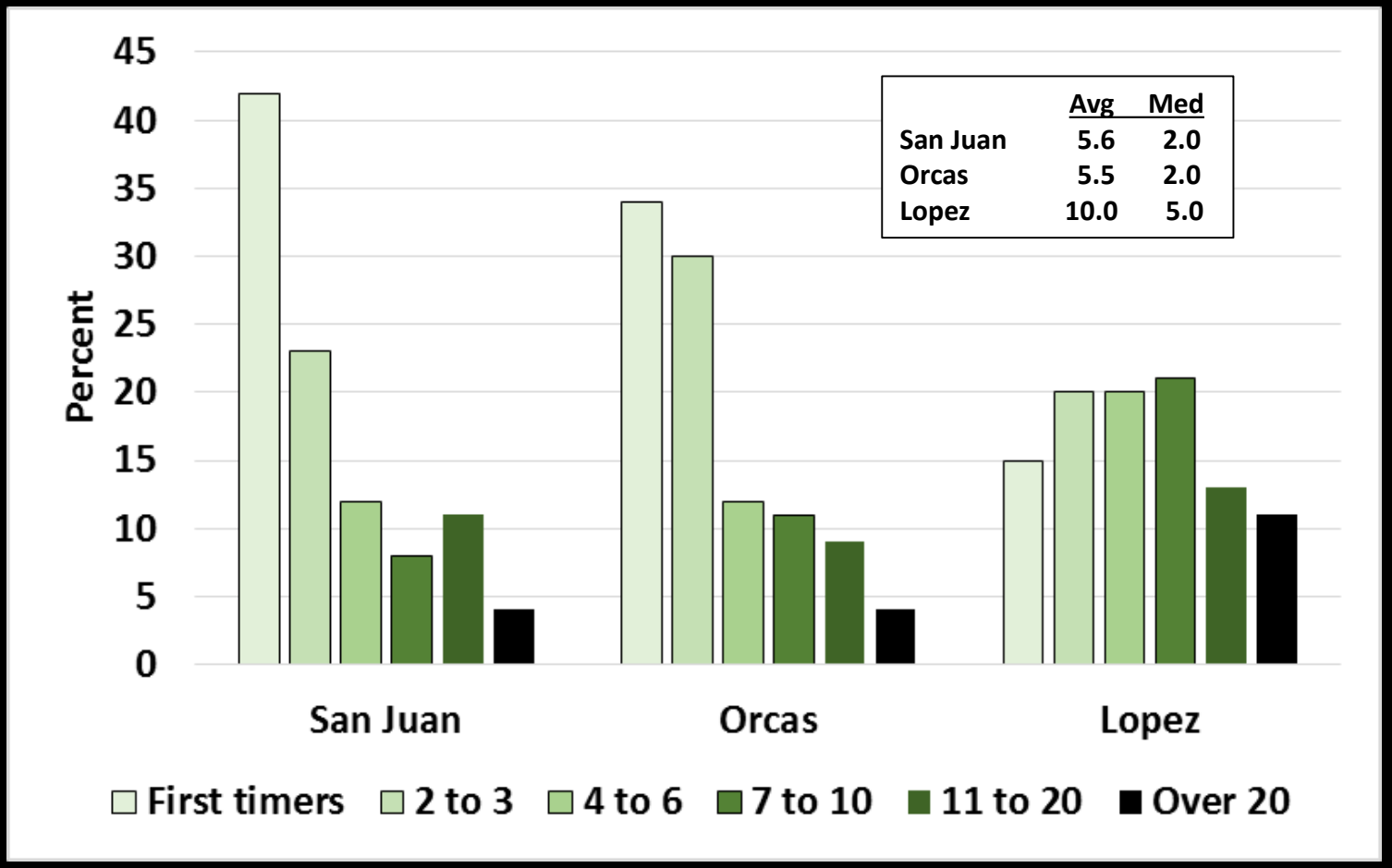


San Juan Island visitors – Where are they from?



Orcas: 56% Washington; 18% other US; 7% Intl.
Lopez: 68% Washington; 14% other US, 4% Intl.

Number of times visiting the San Juan Islands



Lopez > Orcas and San Juan

San Juan has highest number of first-timers

Over 20 includes reports of “dozens,” “hundreds,” “jillion,” “infinite” – not in means

San Juan Island –
Profile of residents visiting sites (n=59)

92% live on San Juan Island
None live on Orcas or Lopez Island

59% year-round residents
8% 7 to 11 months
12% 4 to 6 months
20% < 4 months (higher than Orcas & Lopez)

29% retired (slightly higher than Lopez, similar to Orcas)

Median 10 years living on island (average 11.7)
24% have lived on SJI > 20 years

Visit sites median 4 times /month
25% visit >10 times per month

Rueben Tarte Park

Recreation participation
From ferry survey

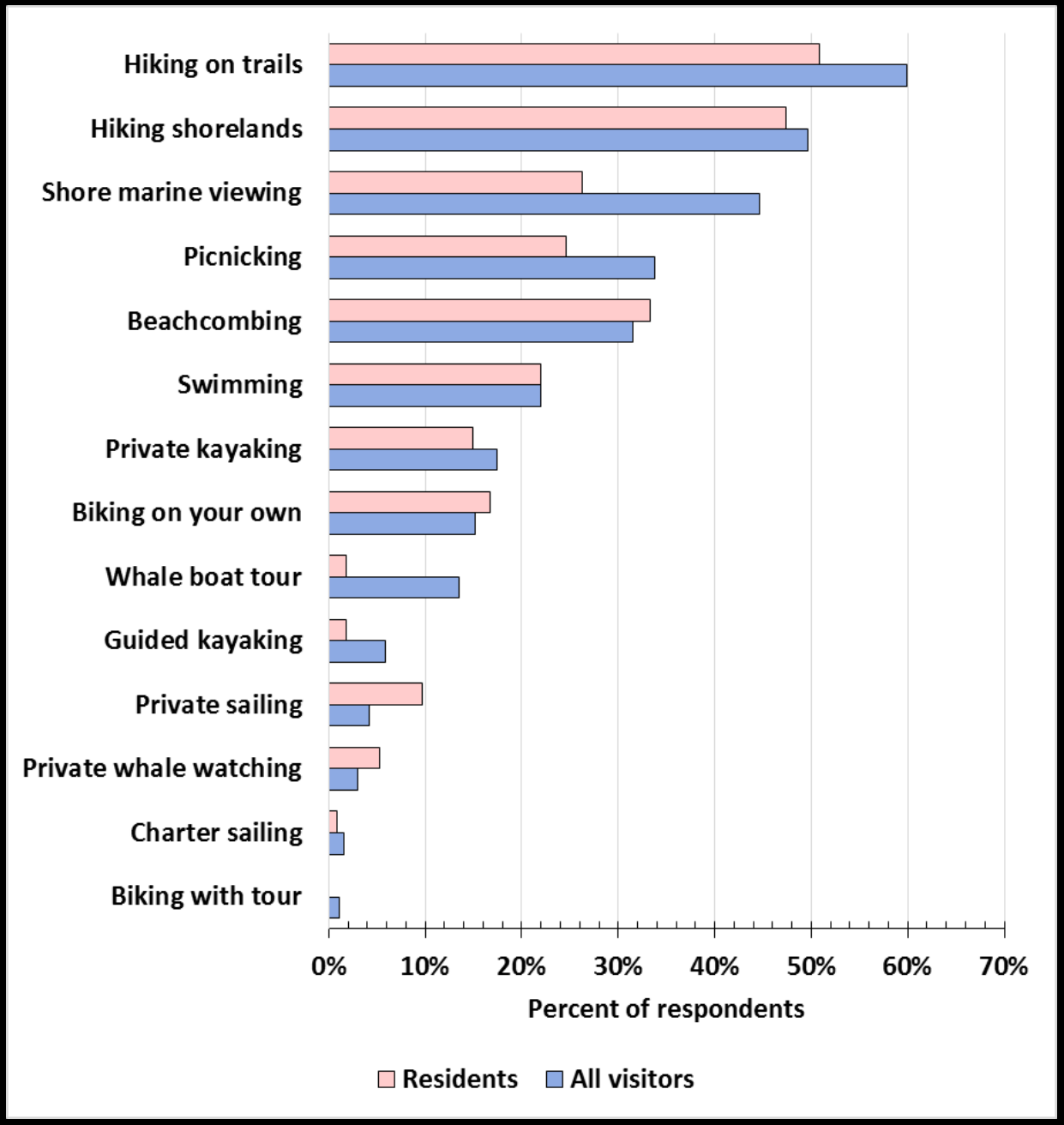
Outdoor recreation participation

From ferry survey – all islands first, then differences

"Please check all the outdoor activities you have done during your visit (if a resident, check activities you have done in the past week)."

Hiking on trails
Etc.

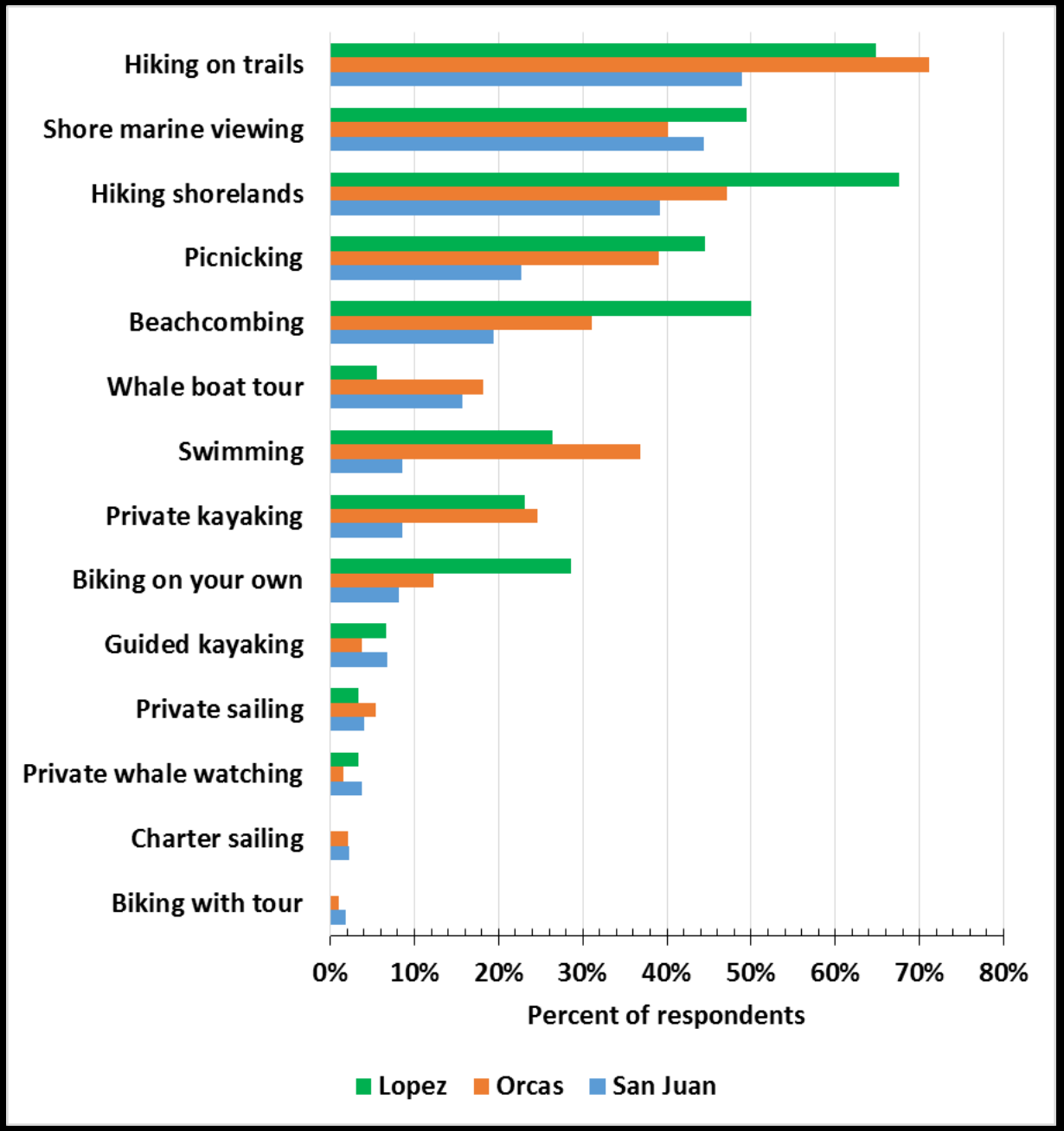
14 activities listed on survey
Percent of visitors and residents who checked each shown on graph



Reported recreation activities

Visitors & residents

- Hiking is top activity
- 5 of 7 top activities are water-proximate
- Visitors and residents are similar (rank order)
- A few exceptions – e.g. visitors > residents for shore marine viewing



Reported recreation activities

Comparing islands

- Orcas & Lopez > San Juan for most activities
- Orcas is highest for trail hiking and swimming – fits with geography
- Small samples for guided activities

Experience preferences

From ferry survey – all islands

The San Juan Islands Experience

From ferry survey

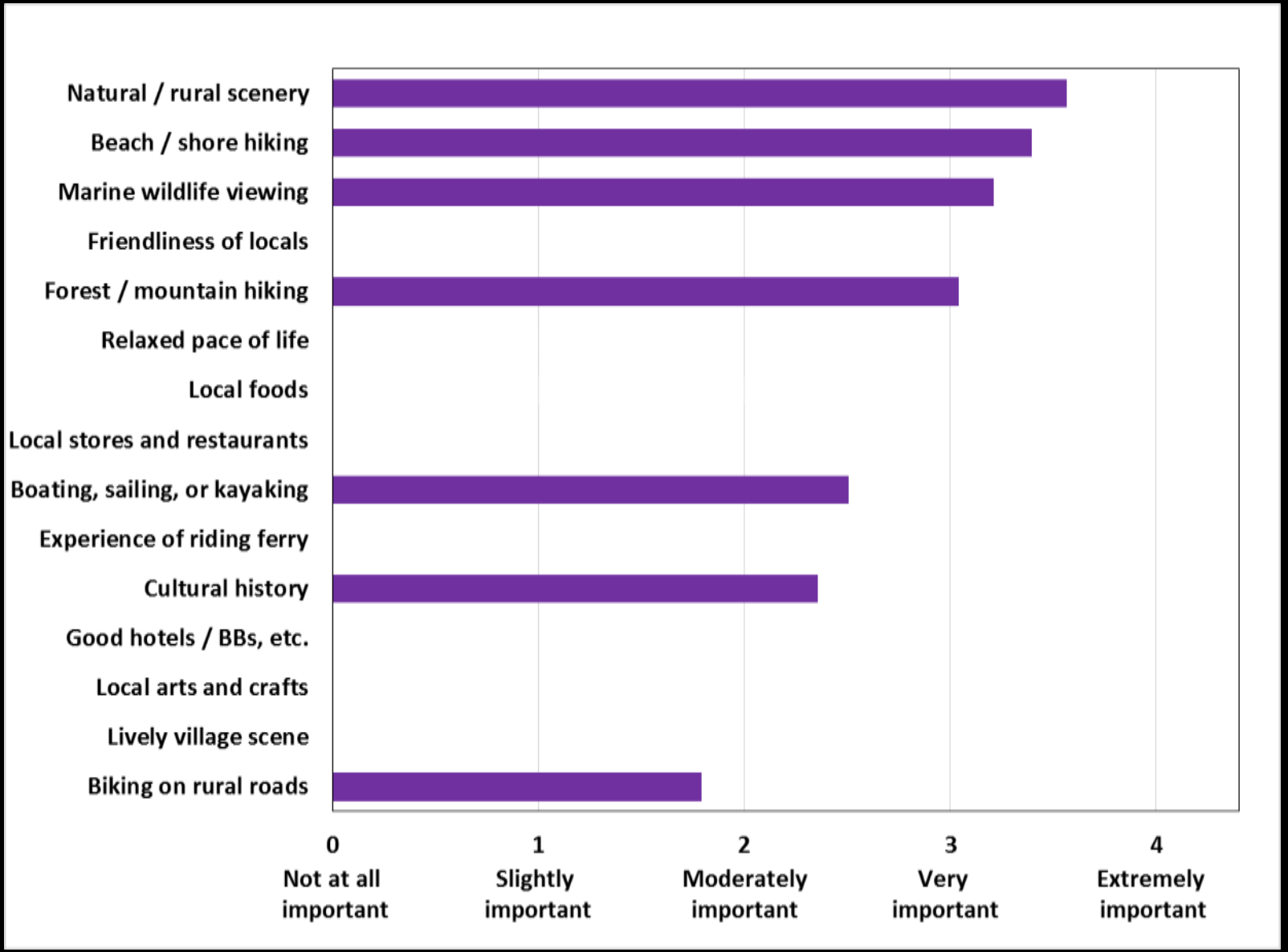
"People enjoy the San Juan Islands for many reasons. Please rate the following reasons for you."

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Natural/rural scenery	0	1	2	3	4
Etc.					
Etc.					

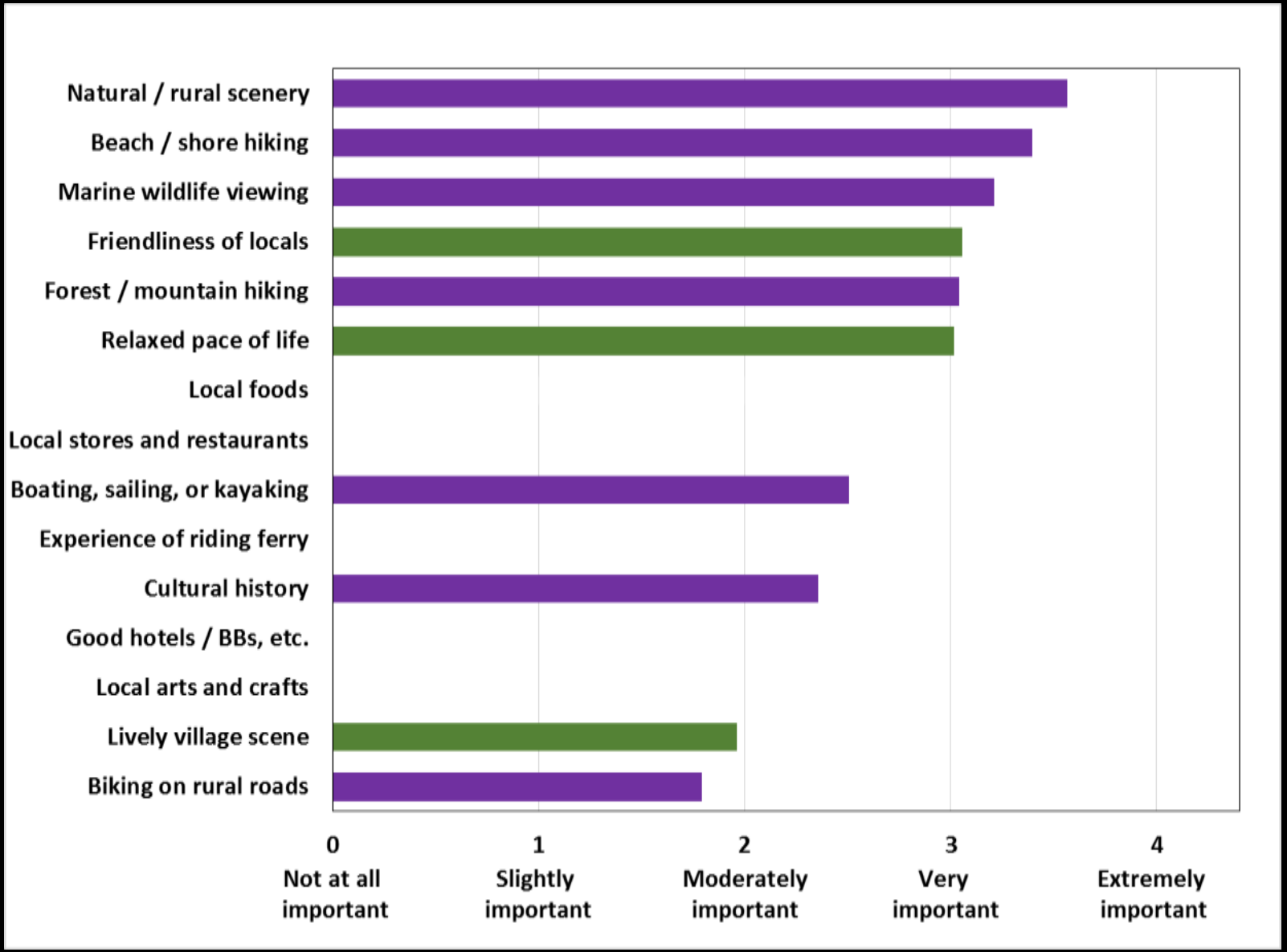
15 items on the survey

Average importance of 12 key items on following graph

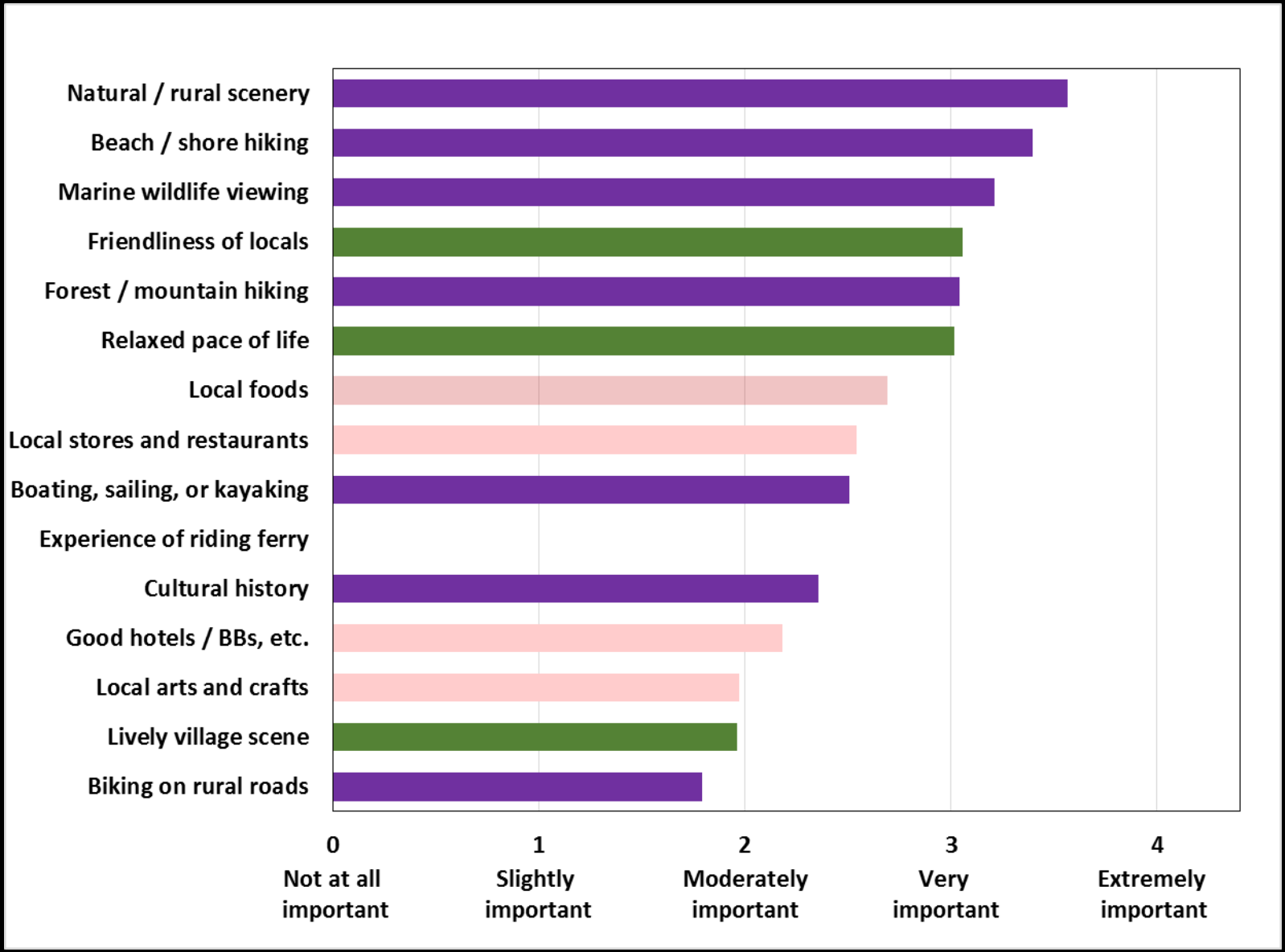
4 of 5 most important experiences rely on natural resources



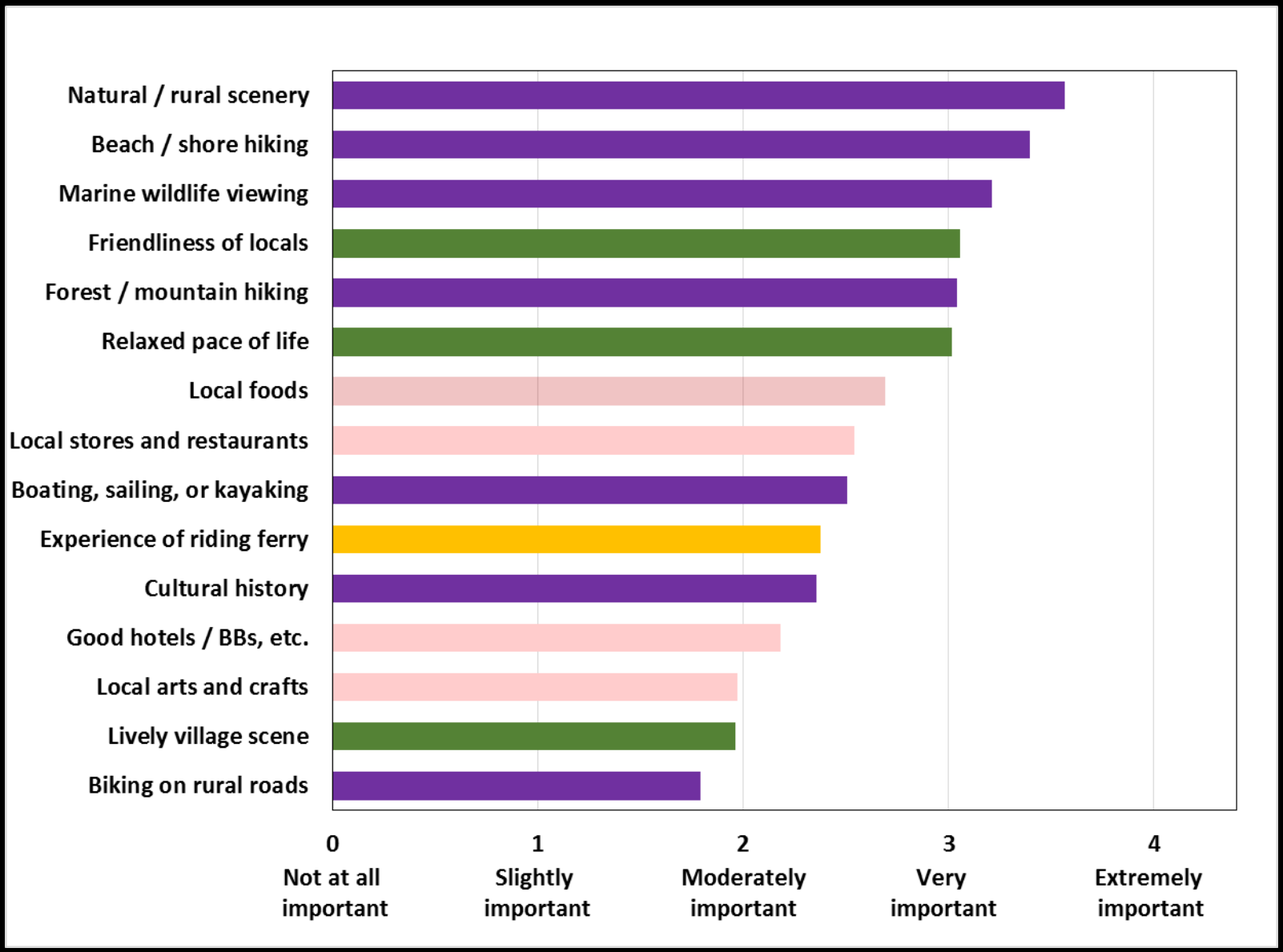
Social setting: Friendliness & relaxed pace > lively village scene

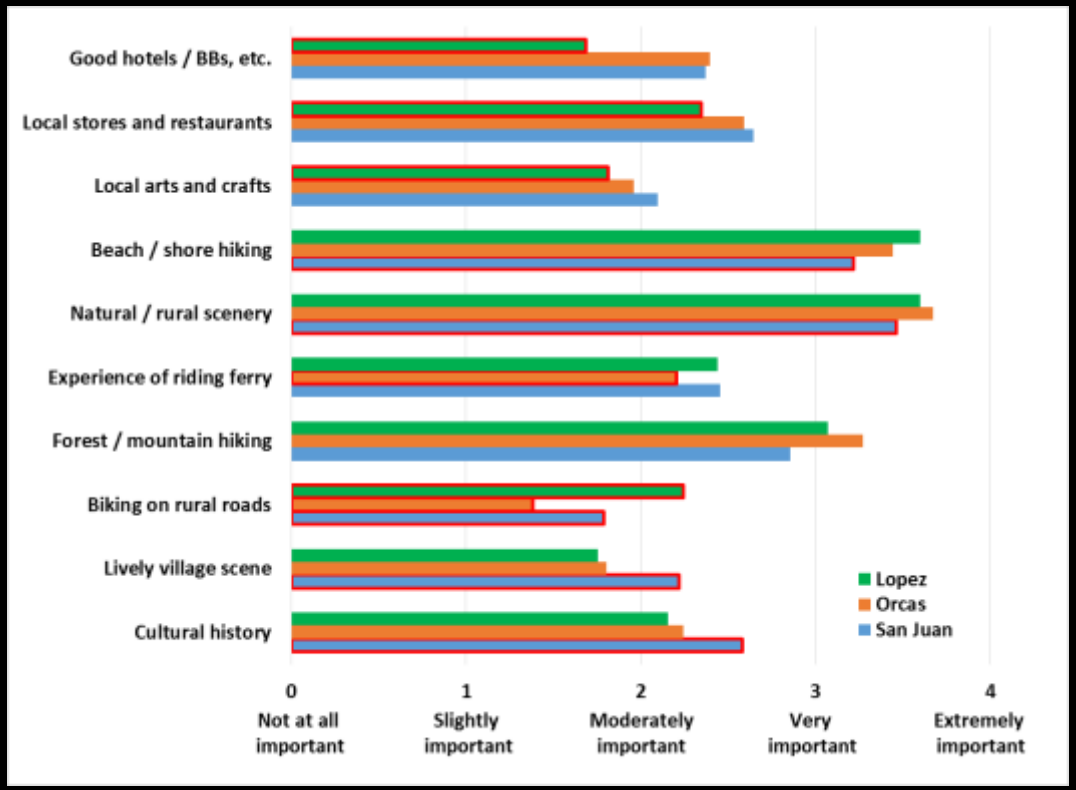


Tourism development is relatively less important



Ferry experience is moderately important





Experience importance

Differences between islands

Compared averages (t-tests, p< .05)

Visitors recognize differences:

Lopez: higher on biking
San Juan: higher on cultural history, lively village scene
San Juan and Orcas > Lopez on arts, stores/restaurants, accommodation

All islands equal on friendliness

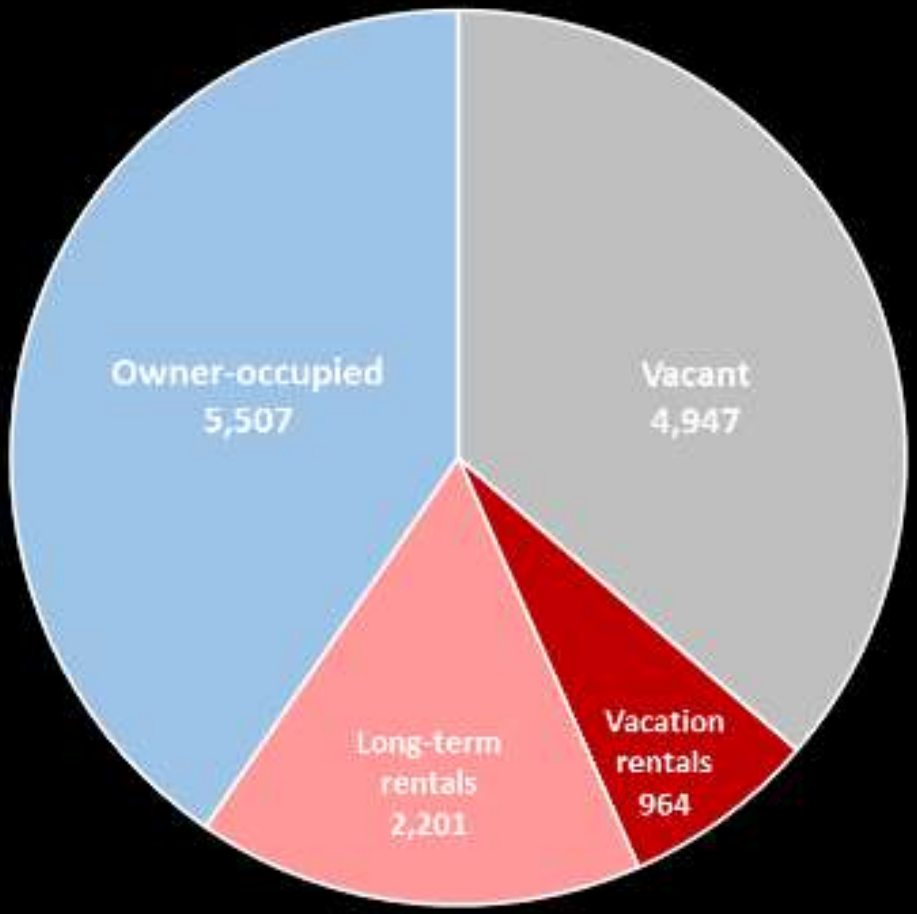
Where can they stay?
Accommodation inventory

Types of Accommodation
Vacation Rental Inventory
Hotel Inventory
QUARRYMAN HALL

Overall housing stock

~13,500 housing units for ~8,000 full-time resident households

Four categories

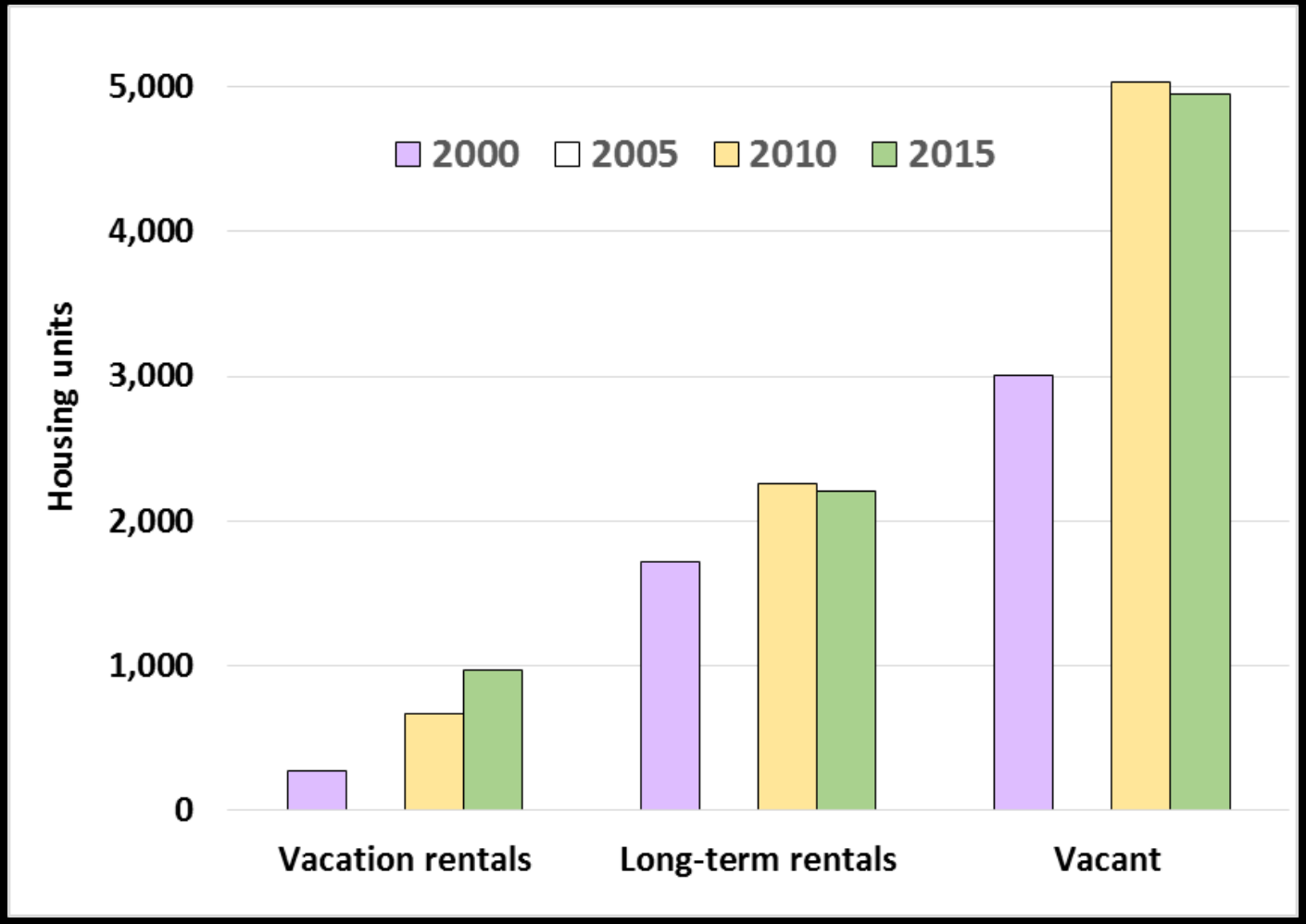


Source: SJI County DCD 2017 briefing on vacation rental code amendments (Erica Shook & Linda Kuller)

Changing proportions

Declining long-term rentals and "vacant" homes

Increasing vacation rentals



Source: SJI County DCD 2017 briefing on vacation rental code amendments (Erica Shook & Linda Kuller)

Vacant homes = second homes
Probably not vacant in summer
Family/friends – free vacation rentals

Rental Platforms

Airbnb - VRBO - Craigslist - Direct booking - Word of mouth

Vacation Rental Inventory

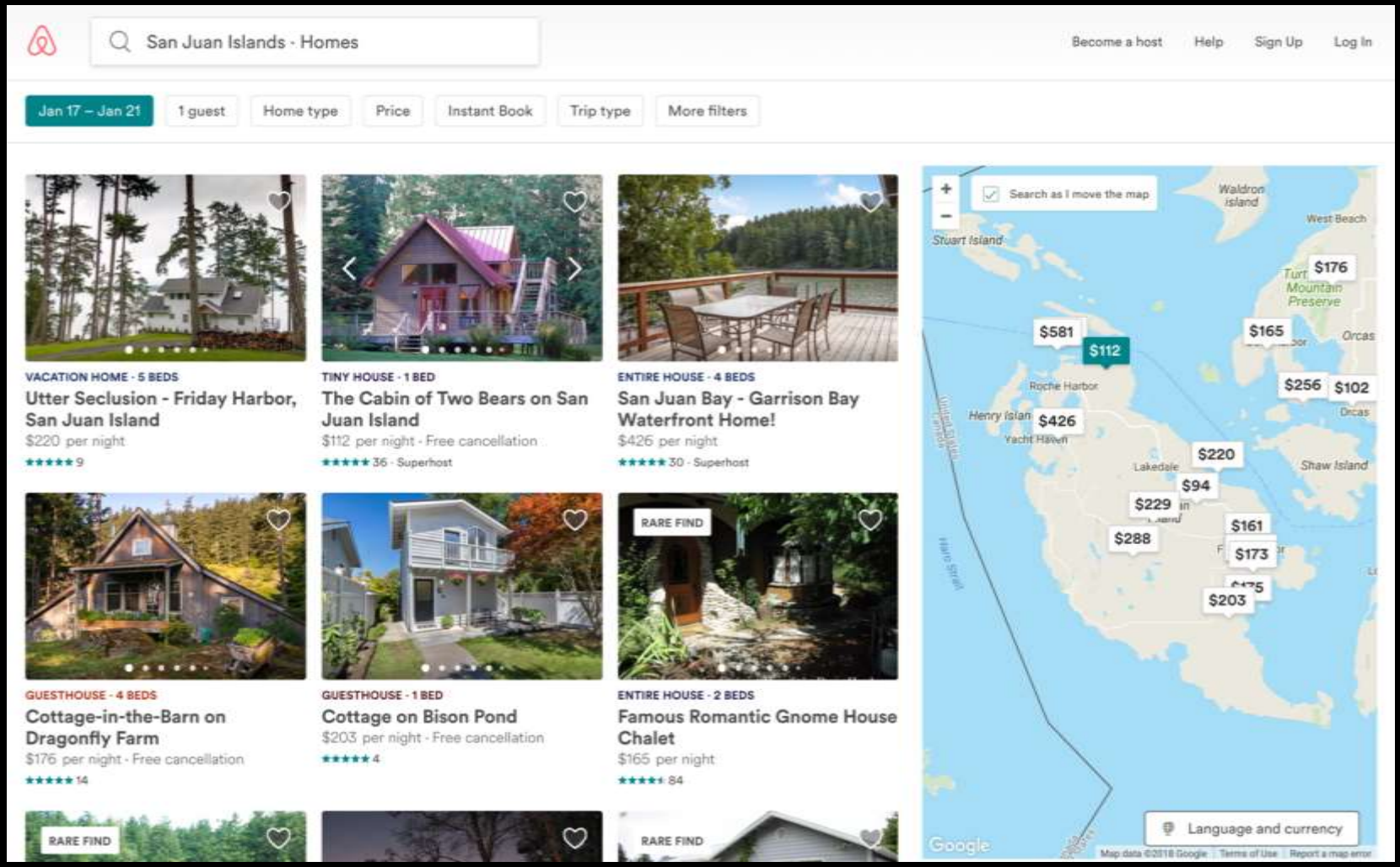
875 units sampled

Random subset of 215 listings

Airbnb & VRBO

San Juan (97), Orcas (60), and Lopez (60)

Sampling


San Juan Islands · Homes
Become a host
Help
Sign Up
Log In
Jan 17 – Jan 21
1 guest
Home type
Price
Instant Book
Trip type
More filters
VACATION HOME · 5 BEDS
Utter Seclusion - Friday Harbor, San Juan Island
$220 per night
9
TINY HOUSE · 1 BED
The Cabin of Two Bears on San Juan Island
$112 per night · Free cancellation
36 · Superhost
ENTIRE HOUSE · 4 BEDS
San Juan Bay - Garrison Bay Waterfront Home!
$426 per night
30 · Superhost
GUESTHOUSE · 4 BEDS
Cottage-in-the-Barn on Dragonfly Farm
$176 per night · Free cancellation
14
GUESTHOUSE · 1 BED
Cottage on Bison Pond
$203 per night · Free cancellation
4
RARE FIND
ENTIRE HOUSE · 2 BEDS
Famous Romantic Gnome House Chalet
$165 per night
84
RARE FIND
RARE FIND
Search as I move the map
Waldron Island
West Beach
Stuart Island
$176
$581
$112
$165
Orcas
$256
$102
Roche Harbor
Henry Island
$426
Yacht Haven
$220
Lakedale
Shaw Island
$94
$229
$161
$288
$173
$203
Language and currency
Google

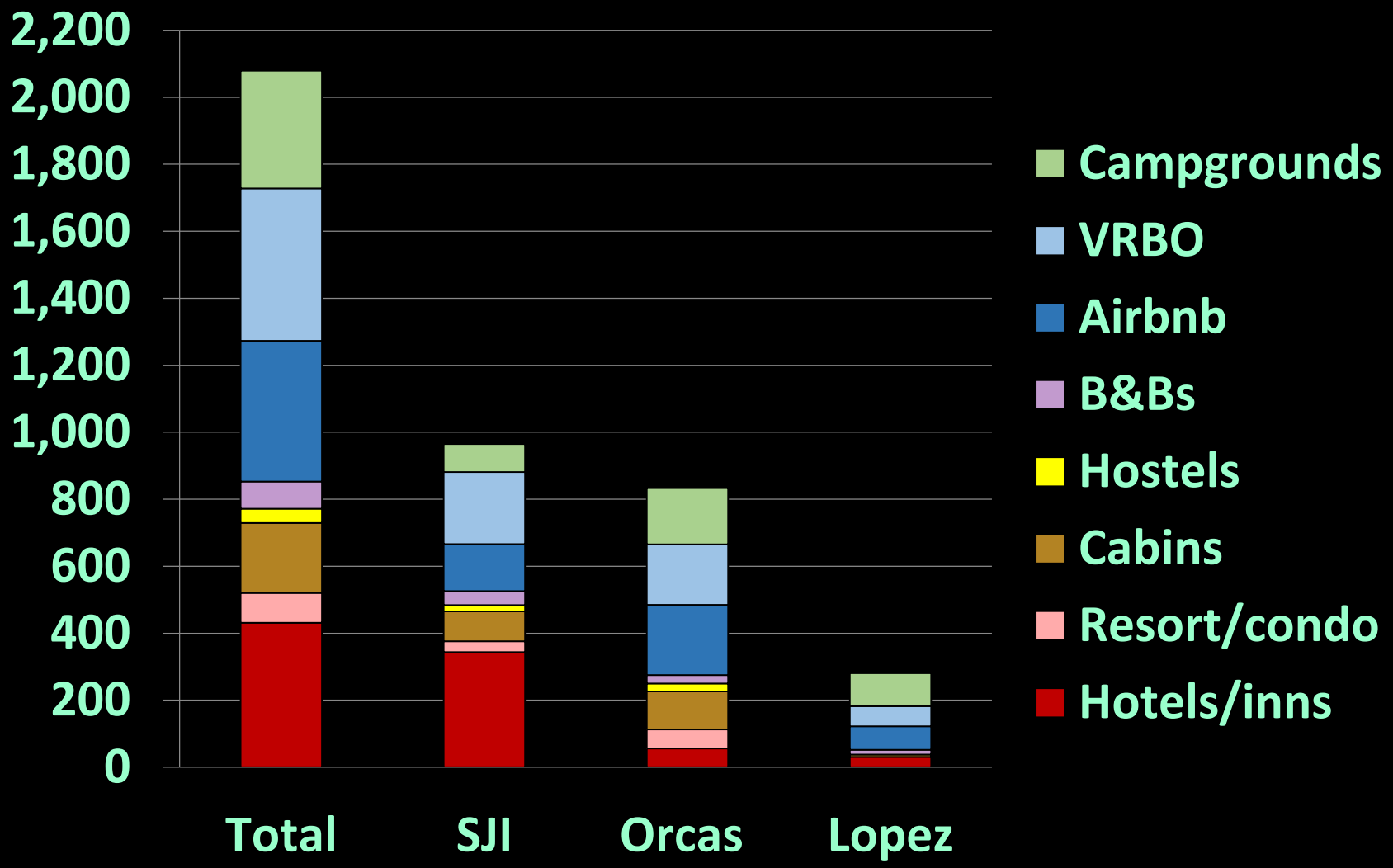
Hotel Inventory

Web searches and structured interviews
76 establishments
San Juan (41), Orcas (28), and Lopez (7)

~ 50% of units
have kitchens

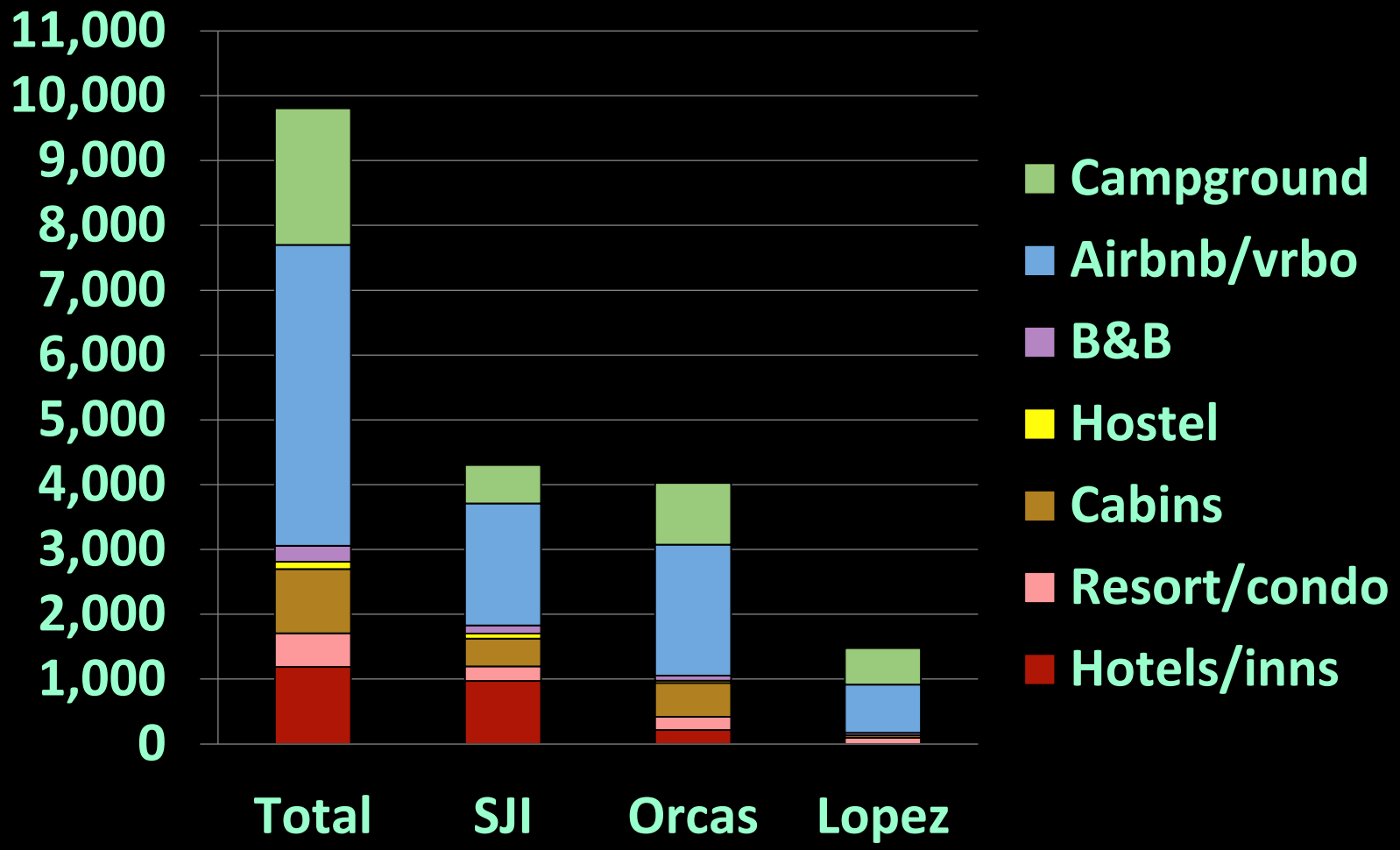
Number of accommodation units

Rooms / bedrooms / campsites



Estimated average overnight visitors

(if all units were occupied)

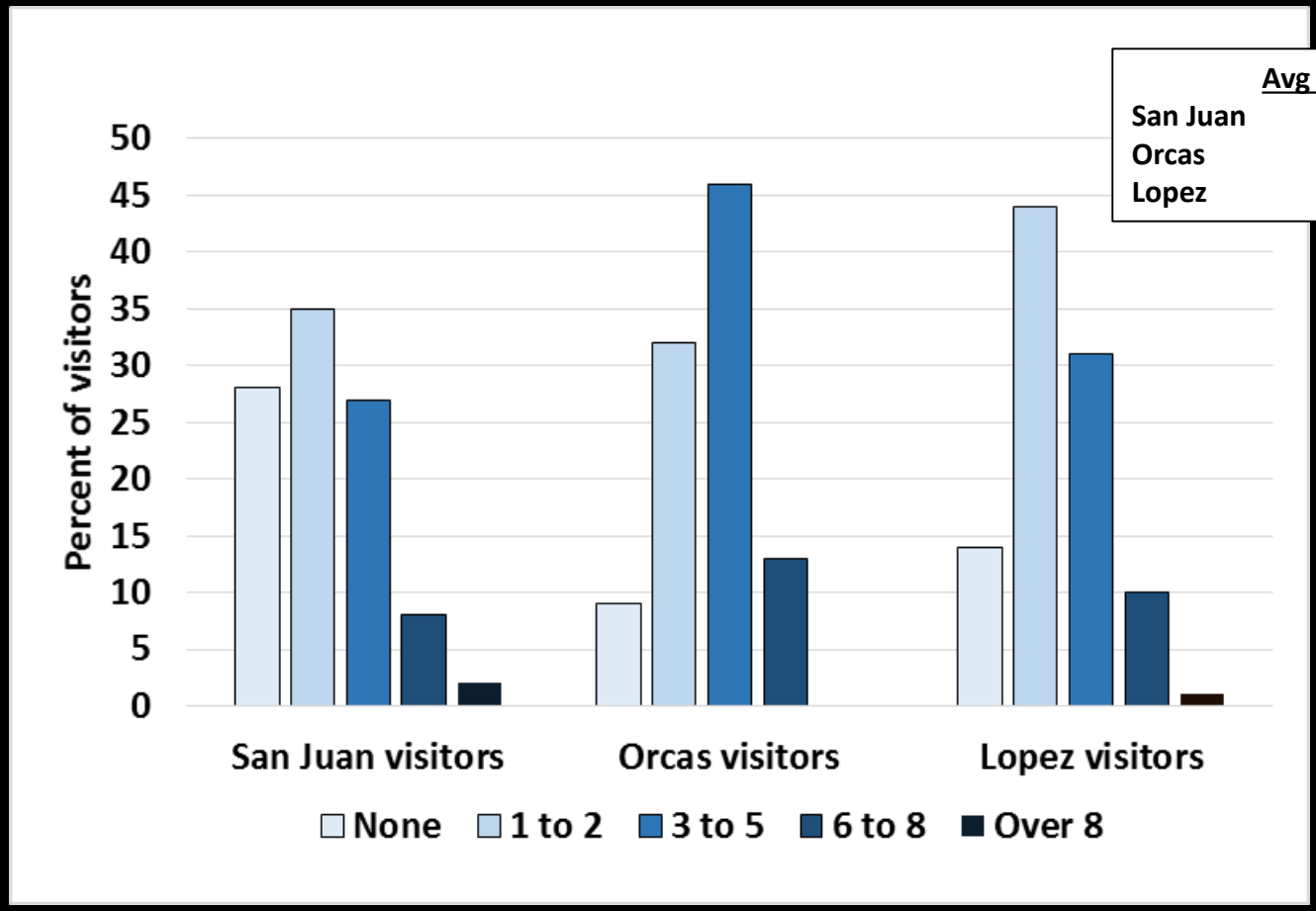


Assumes 3 people per hotel unit, 7 per condo, 6 per cabin, 4 per hostel room, 3 per BB bedroom, 5 per transient rental unit, and 6 per campsite

Where do they go?
Onsite and ferry surveys; some use stats

Number of recreation sites visited (total and per day)

For the island where they were surveyed



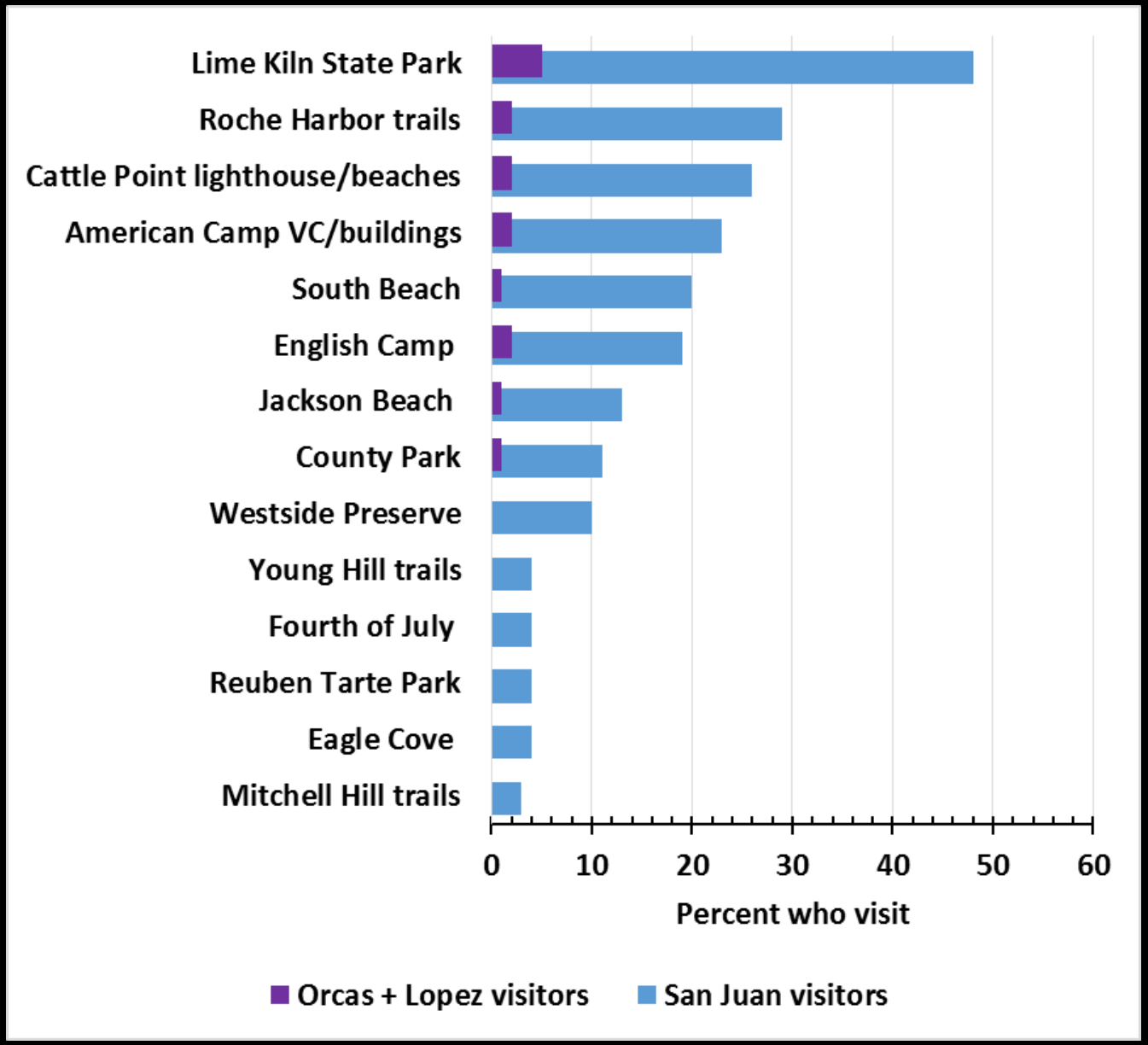
	Avg # of sites	Sites/day
San Juan	2.2	1.1
Orcas	3.1	1.2
Lopez	2.6	1.1

Majorities visit multiple sites

Orcas > Lopez > San Juan

More San Juan visitors don't visit any sites

Across all islands, visitors go to ~1 site per day



Most visited outdoor recreation sites on San Juan Island

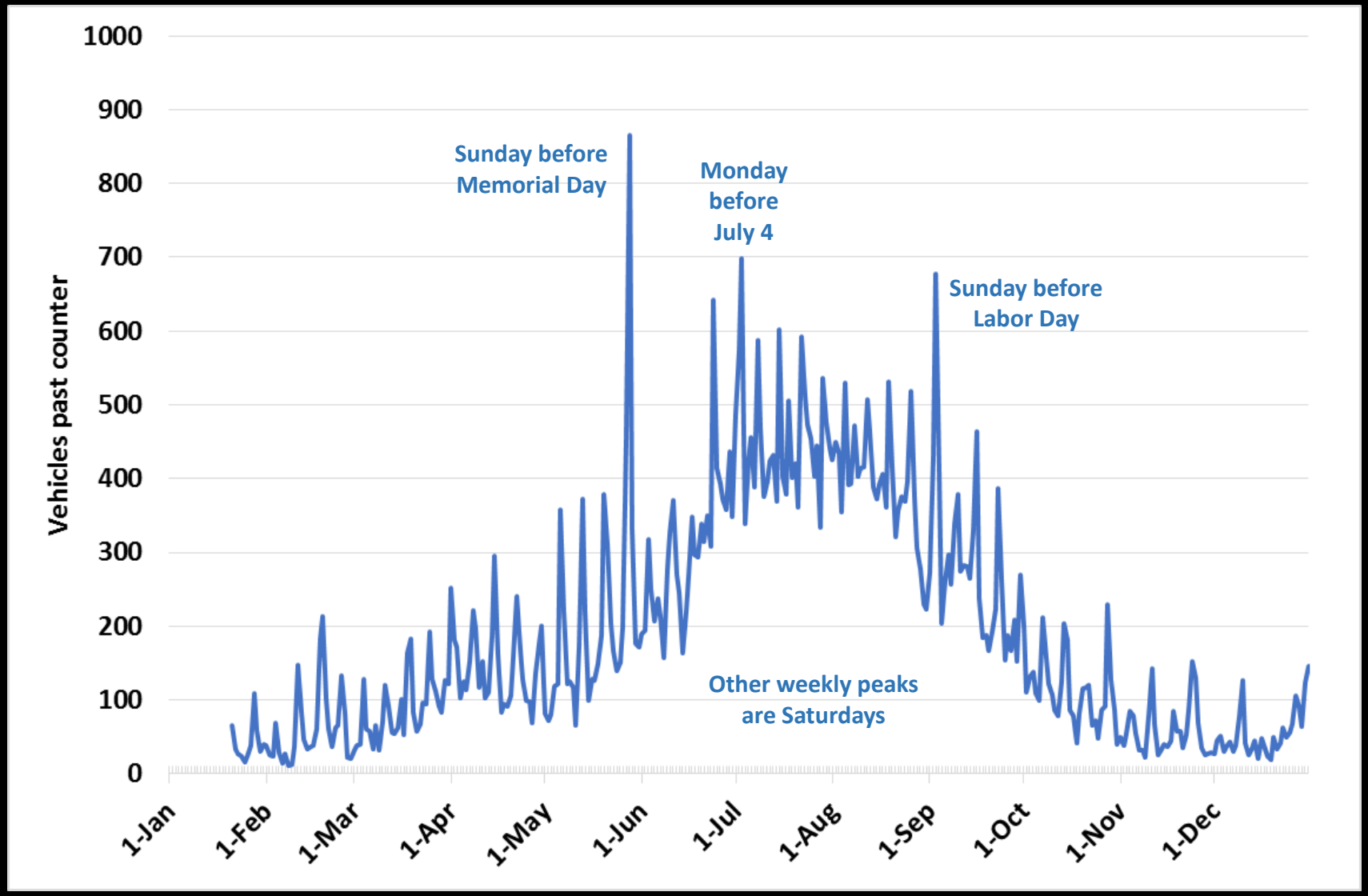
Others listed:

Friday Harbor
Shops/restaurants
Alpaca Farm
Lavender Farm
Deadman's Bay
Egg Lake
Cemetery
Whales

Use levels at sites

Onsite counts

Lime Kiln traffic counts 2017



Same season, weekend, and holiday effects shown in WSF data

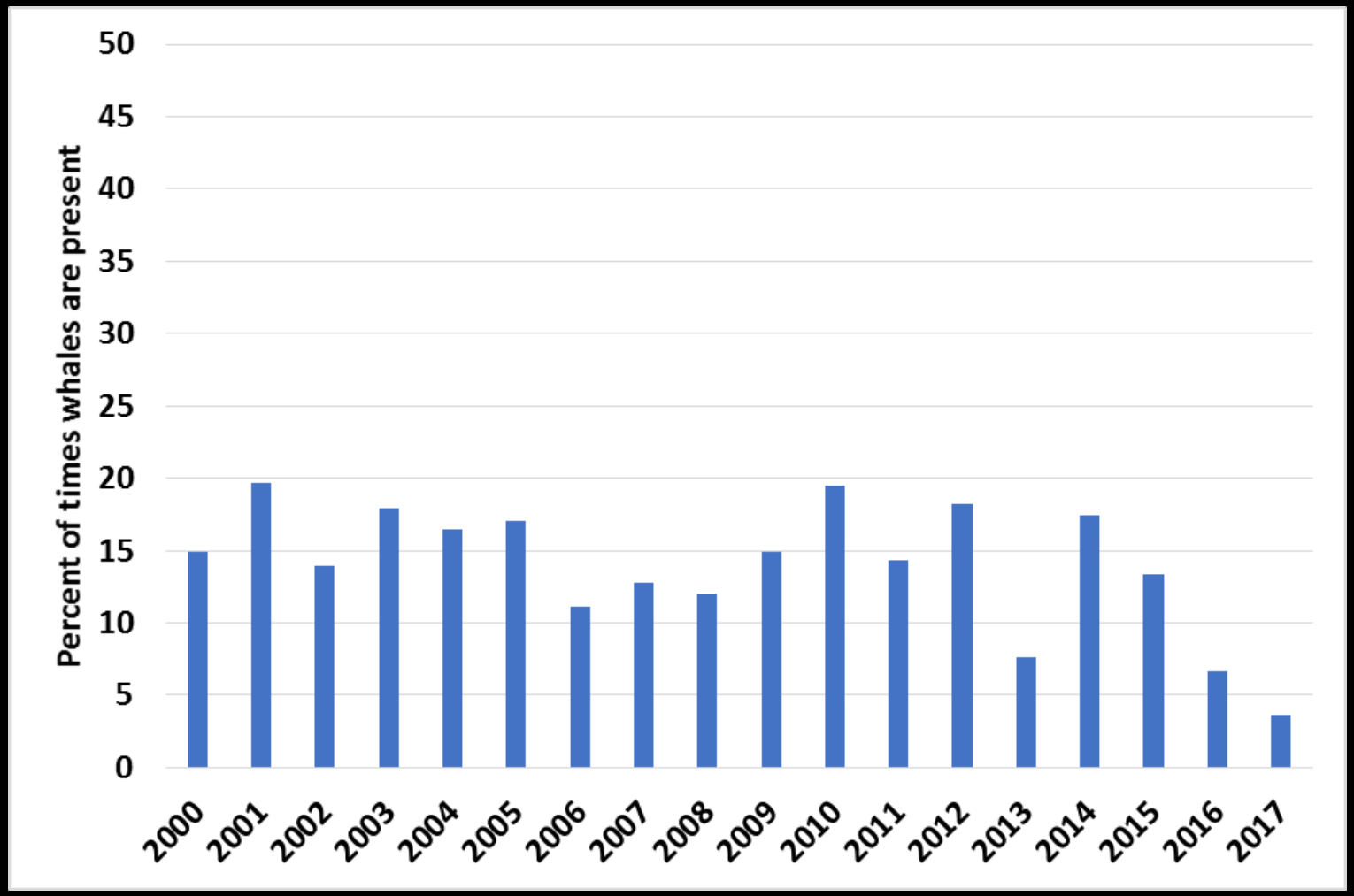
Bob Otis Lime Kiln observations

Ripon College researcher
Tracked whales since 1990
9-5 May 20 to Aug 10 (83 days)

Whale behavior focus
Tracks visitors, dogs, weather, etc.
Counts visitors

- In lighthouse through day
- From lighthouse at 4 times
- 10 am; noon; 2:30 pm; 5 pm
- Tracks if whales present
- Has other information…dogs, boats…

Percent of times whales are present



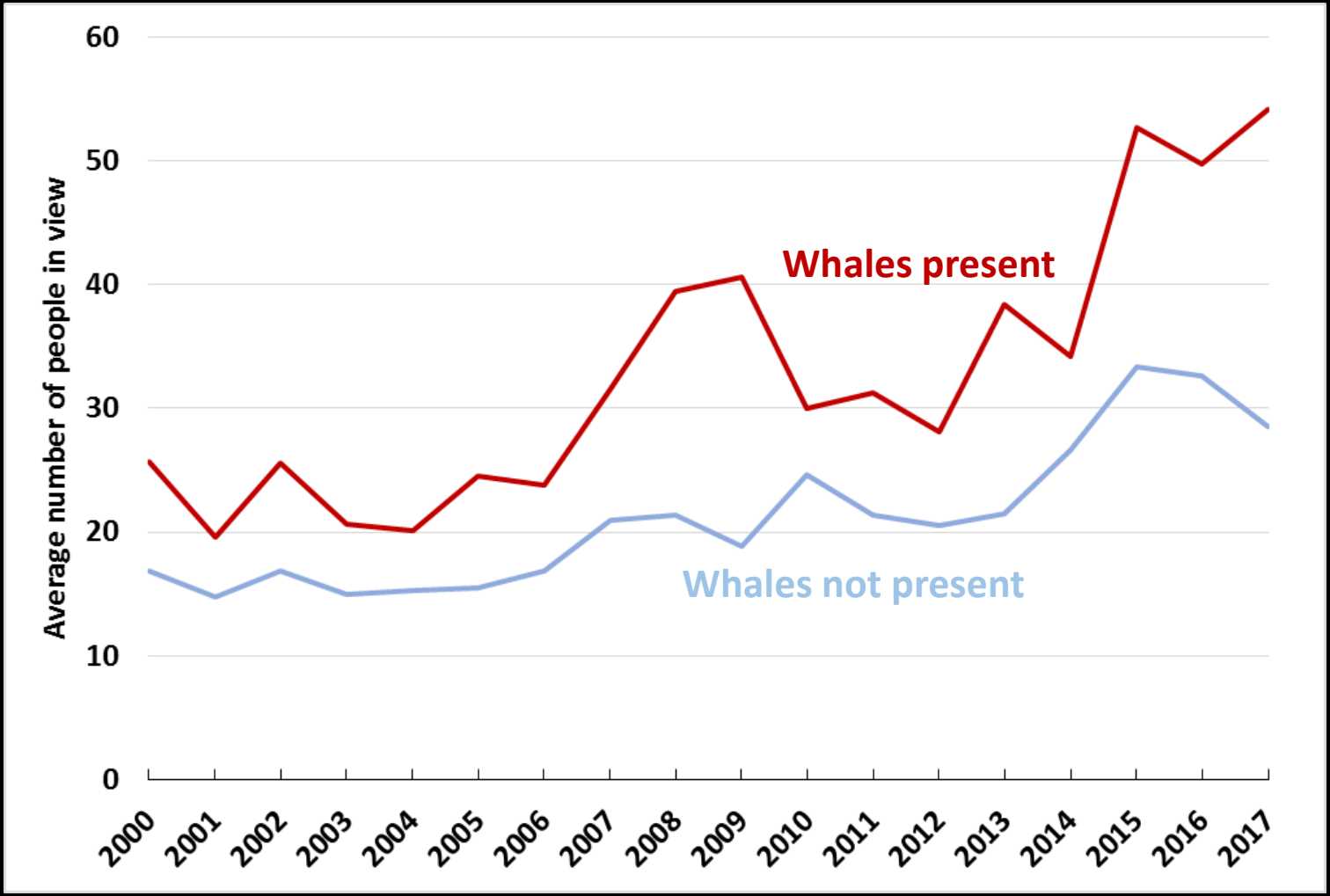
Long term average is 14%; 10-20% most years
But down in 2016 and 2017

Best times for viewing at Lime Kiln

Percent of times with whales

10% at 10 am
16% at noon
17% at 2:30 pm
14% at 5 pm

Average number of people in view from Lighthouse

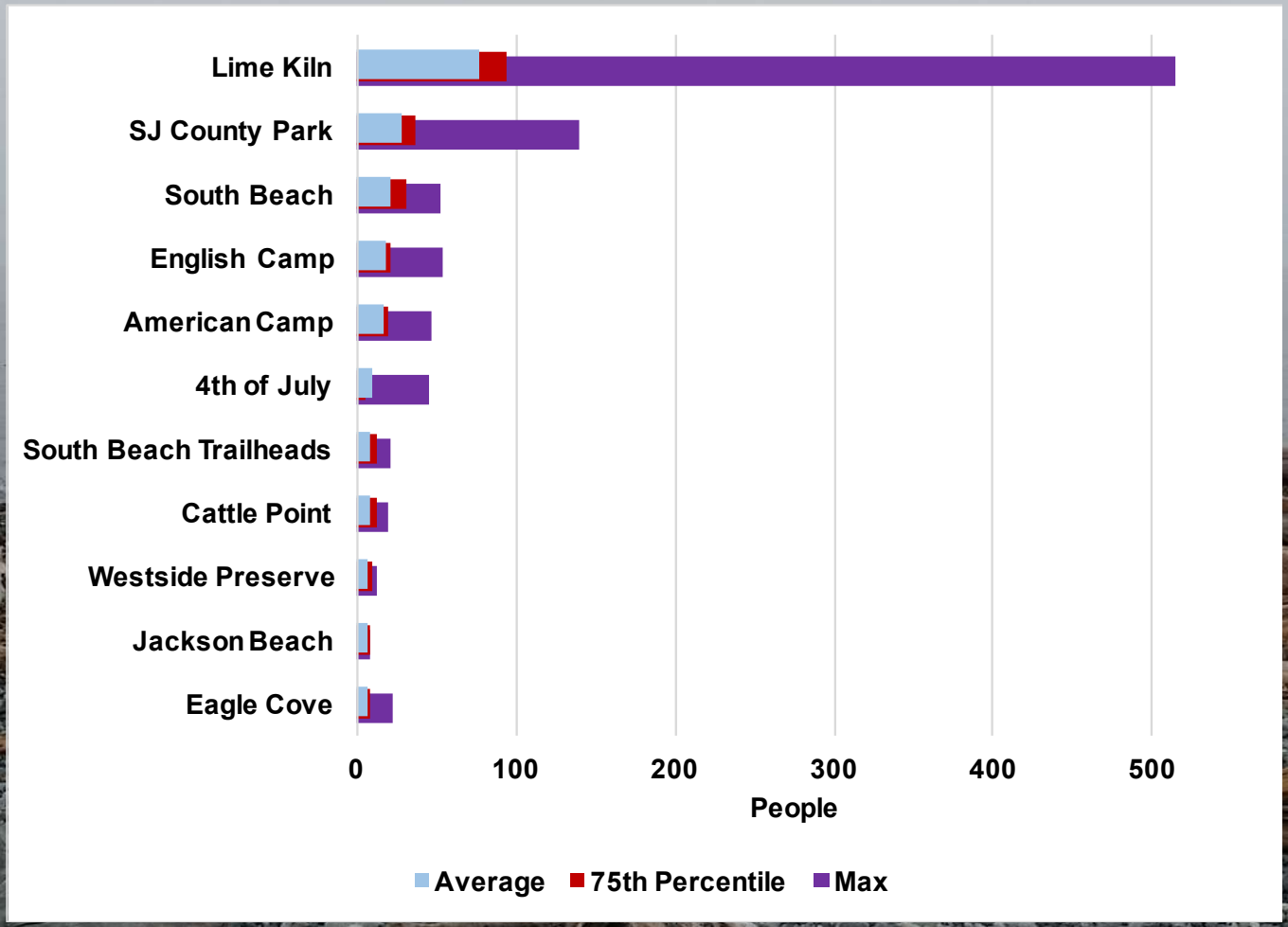


Use has increased over years

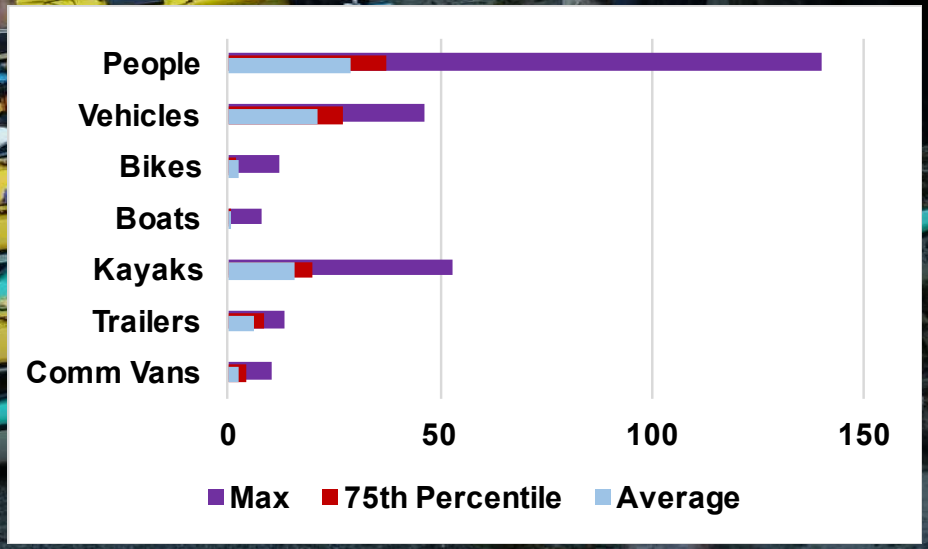
More people when whales are visible (but that isn't very often) stay longer

Widening gap – indicator of social media effect? Whale rushes are possible

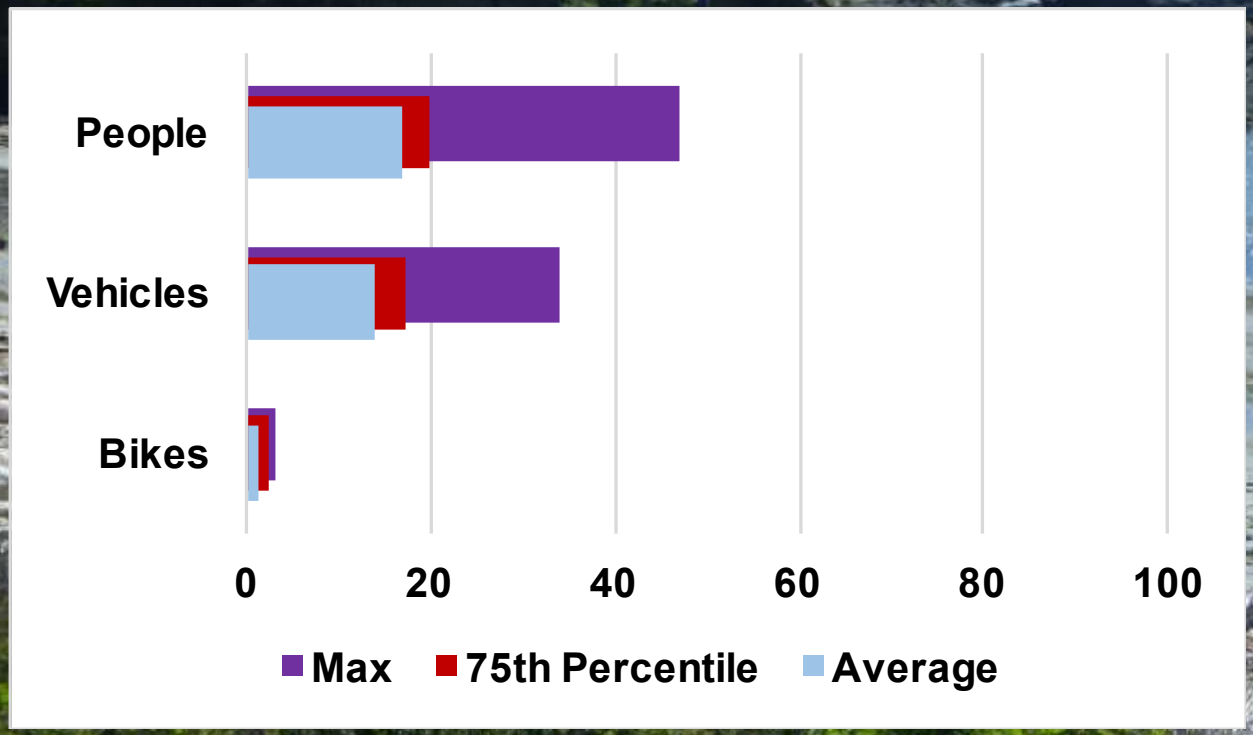
San Juan Island – people at all sites



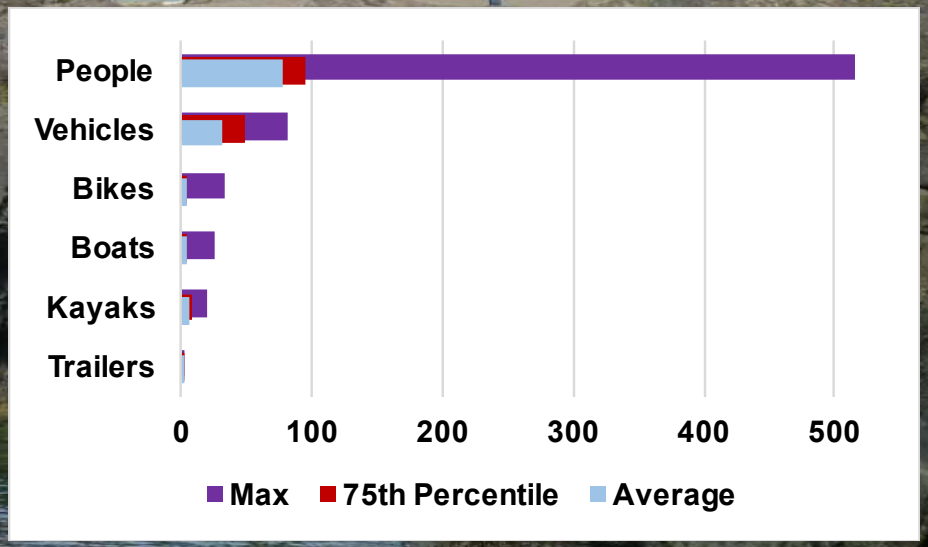
San Juan County Park



San Juan Island
American Camp



San Juan Island Lime Kiln



Lime Kiln, 105 people
~200 in area

Lime Kiln use densities – people per 100 yards of trail

May-September 2017 Averages

Avg. daily traffic count: 330 vehicles
Whole park avg. visitors: 64.8 people
Avg. lighthouse visitors: 241 people

15.1/22.9

10.0/5.9

12.5/13.2

Parking - 15.5 cars

Parking - 7.7 cars

8.7/4.8

13.8/4.6

(Count/density)

Lime Kiln use densities – people per 100 yards of trail

Tue July 4, 2017 1:20 pm

Daily traffic count: 338 vehicles

Daily lighthouse visitors: 162 people

Whole park AOT visitors: 109 people

11/16.7

28/16.6

12/12.7

Parking - 17 cars

Parking - 8 cars

10/5.5

28/9.3

(Count/density)

Lime Kiln use densities – people per 100 yards of trail

Wed July 5, 2017 9:00 am

Daily traffic count: 426 vehicles

Daily lighthouse visitors: 307 people

Whole park AOT visitors: 1 person

0/0.0

0/0.0

0/0.0

Parking - 0 cars

Parking - 2 cars

1/0.6

0/0.0

(Count/density)

Crowding

Onsite and ferry surveys – comparison to <u>many</u> other studies

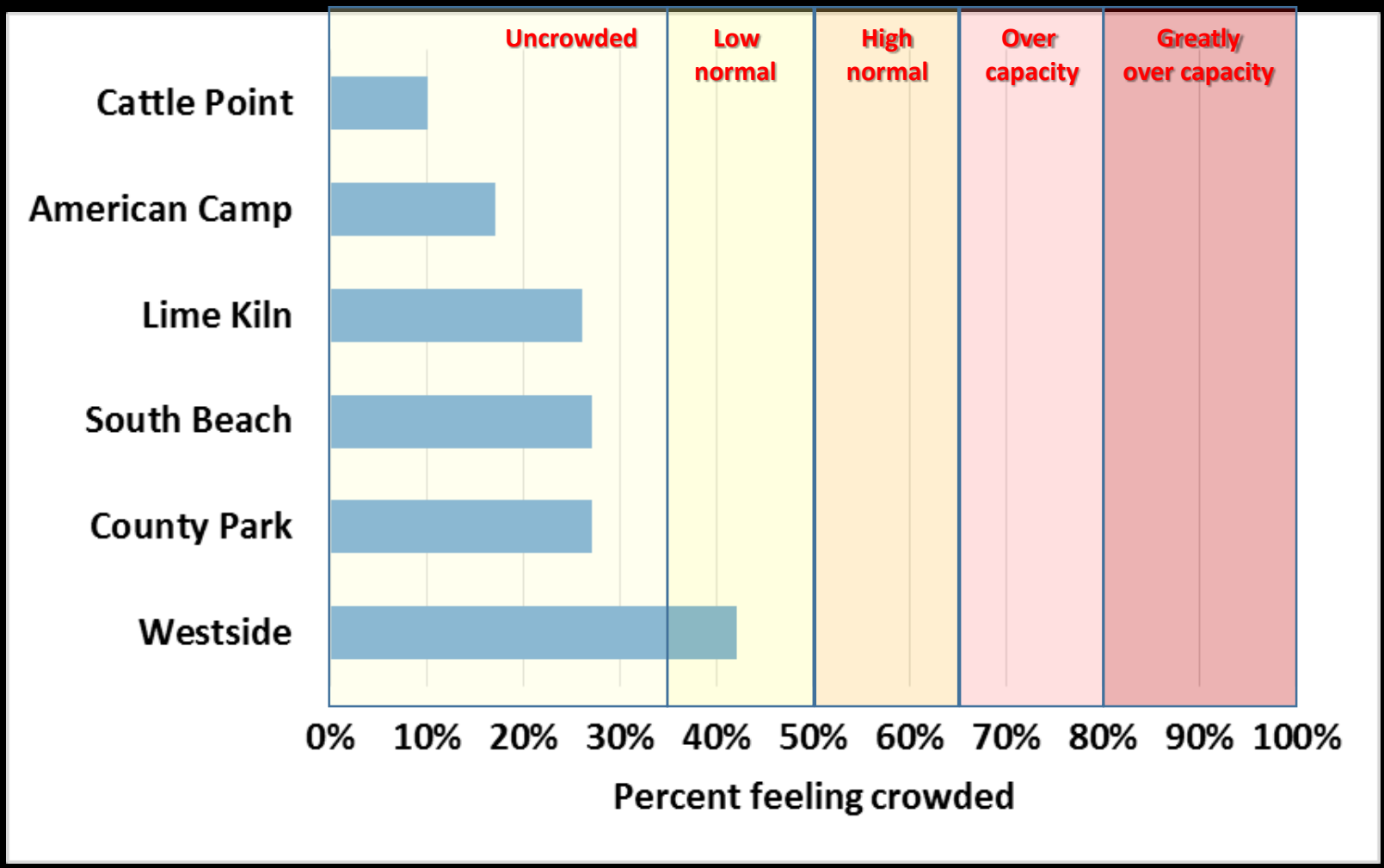
Crowding

"How crowded did you feel in the following locations during your visit?"

	Not at all crowded		Slightly crowded		Moderately crowded		Extremely crowded	
Parking in villages	1	2	3	4	5	6	7	8	9
Etc.									
Etc.									

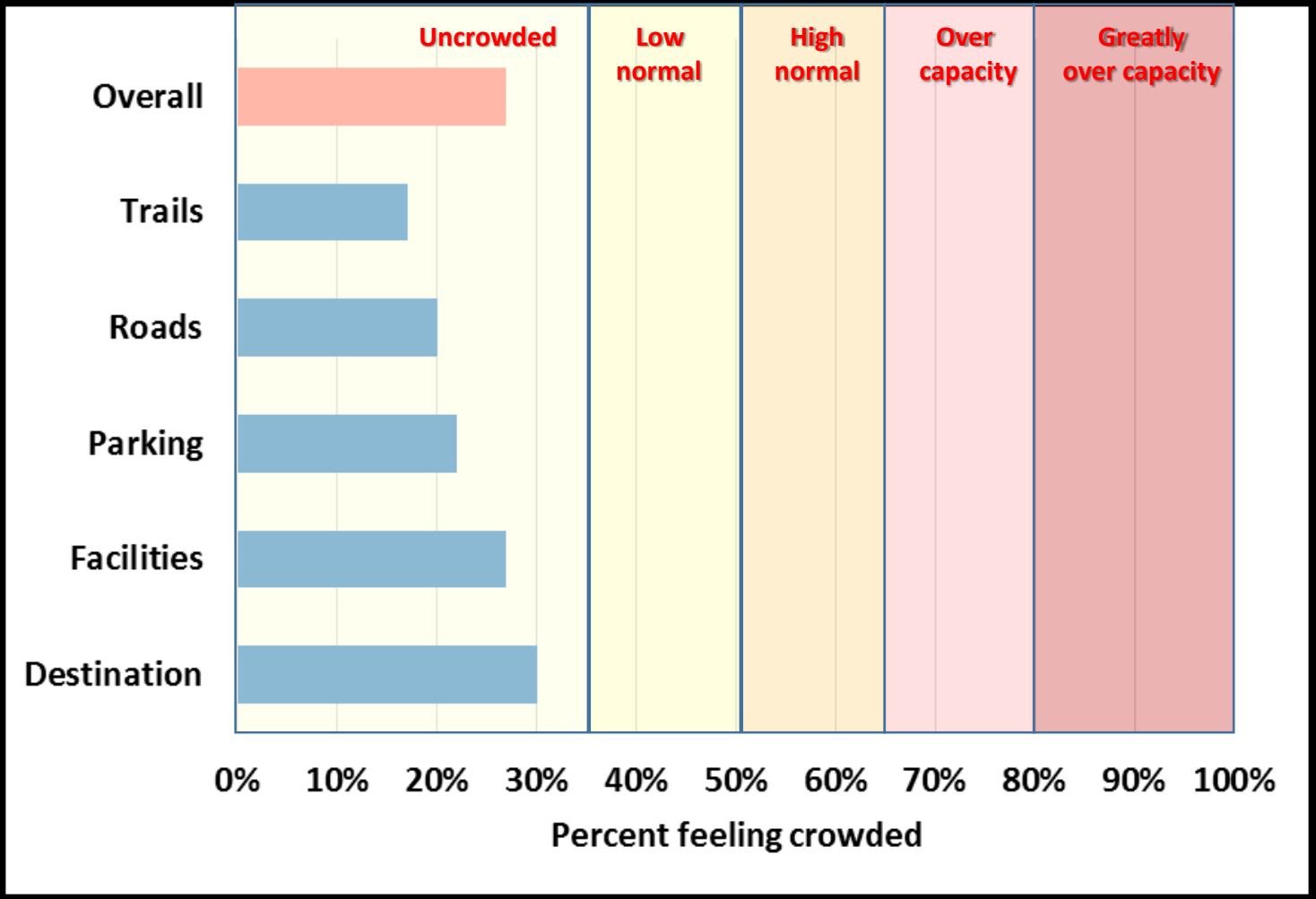
Percent reporting 3 or higher (some degree of crowding) for all locations shown in following graph…
"Rule of thumb" indicator of capacity…

San Juan Island – Percent feeling crowded at sites (overall)

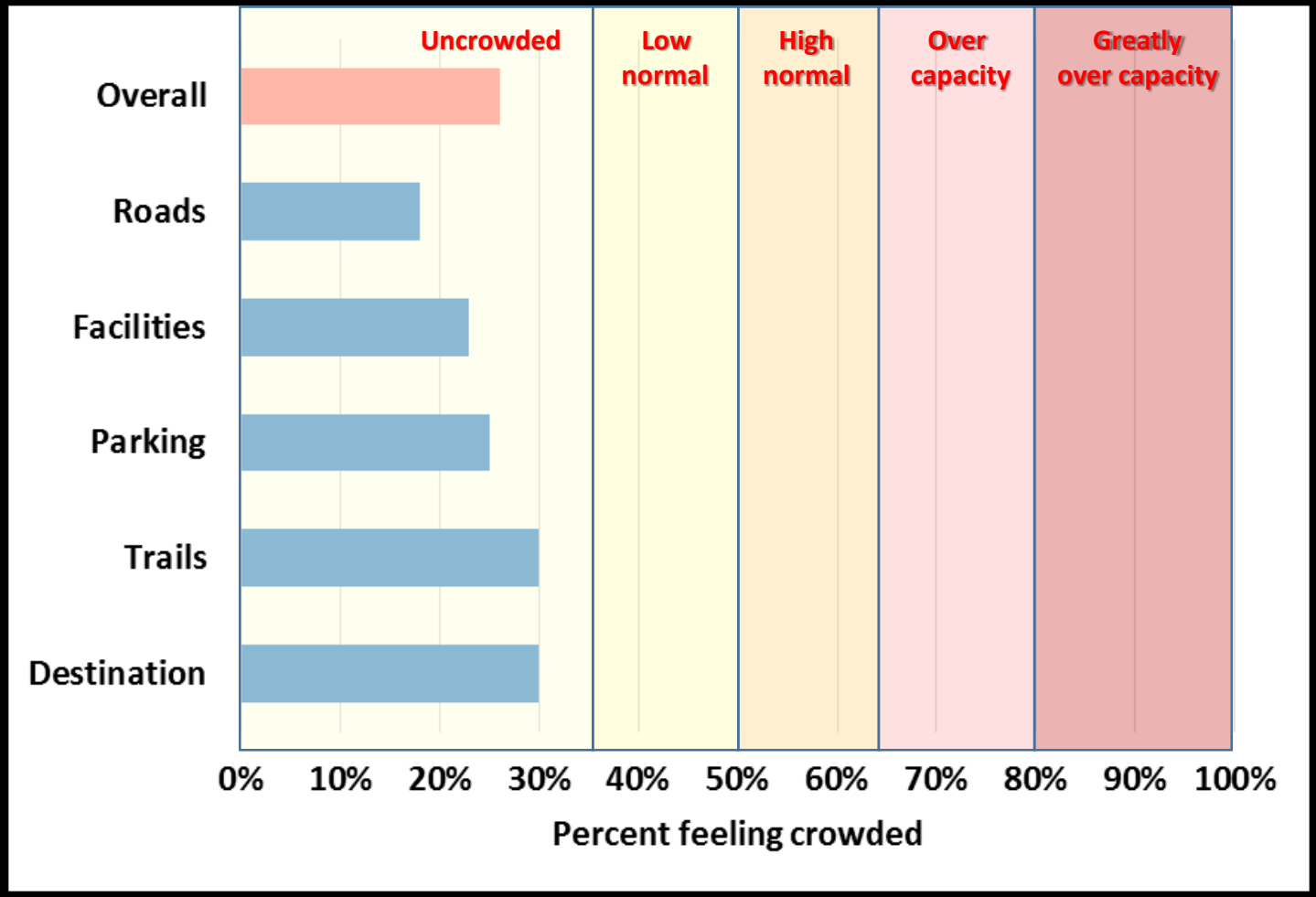


Surprisingly low levels of crowding (compared to other islands' sites)
Especially Lime Kiln and County Park (see further analysis below)

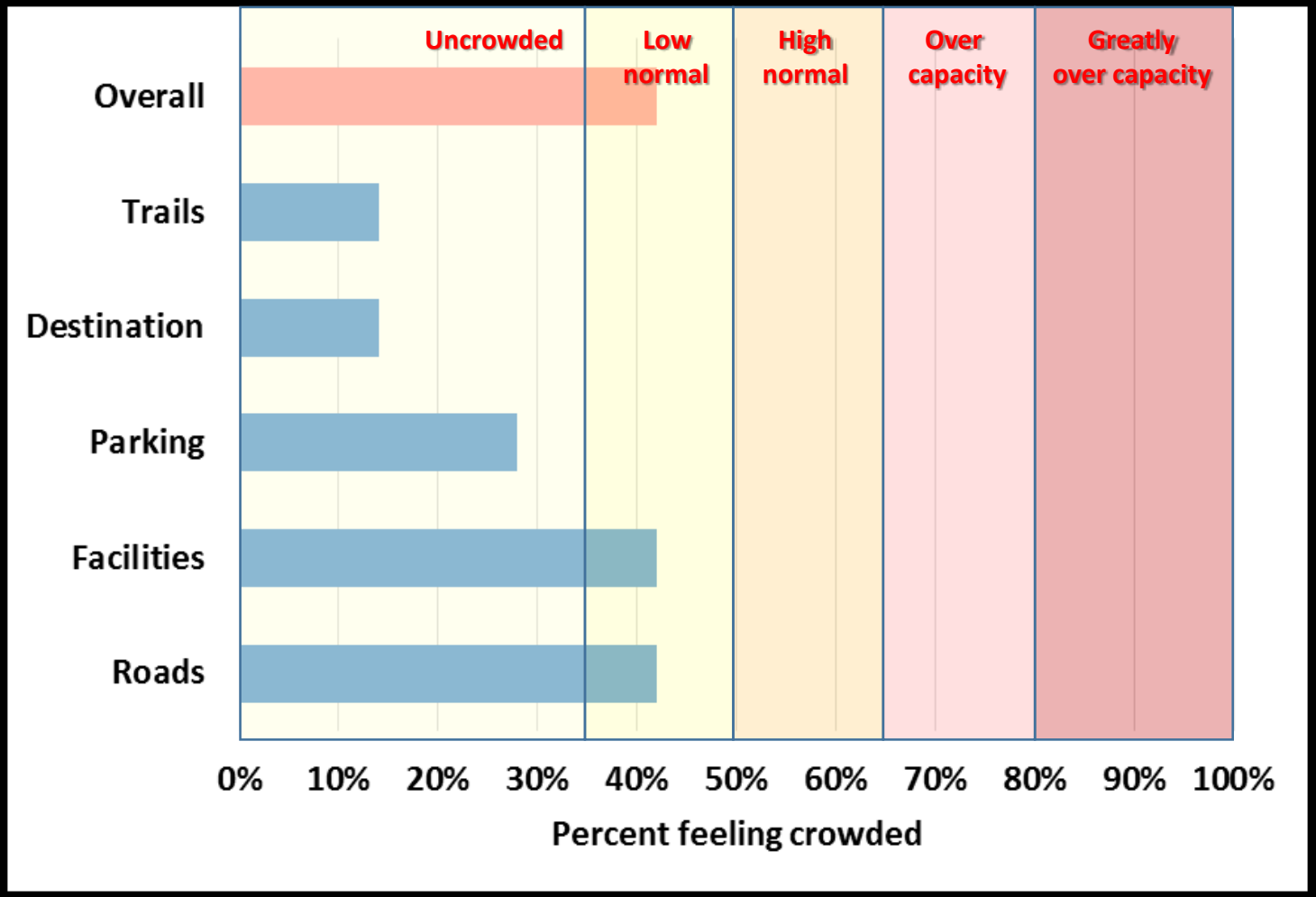
San Juan Island – Percent feeling crowded at County Park



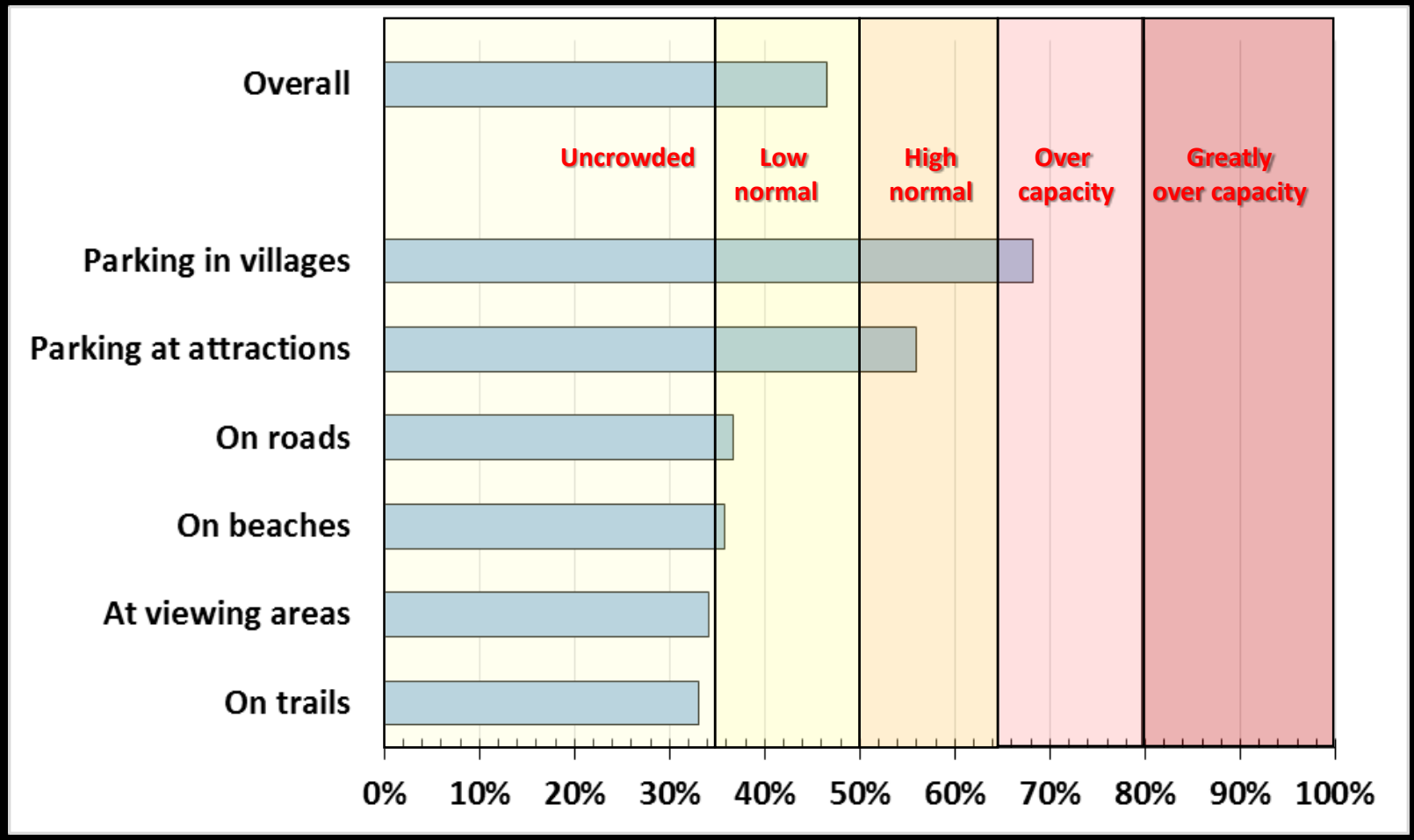
San Juan Island – Percent feeling crowded at Lime Kiln



San Juan Island – Percent feeling crowded at Westside Preserve



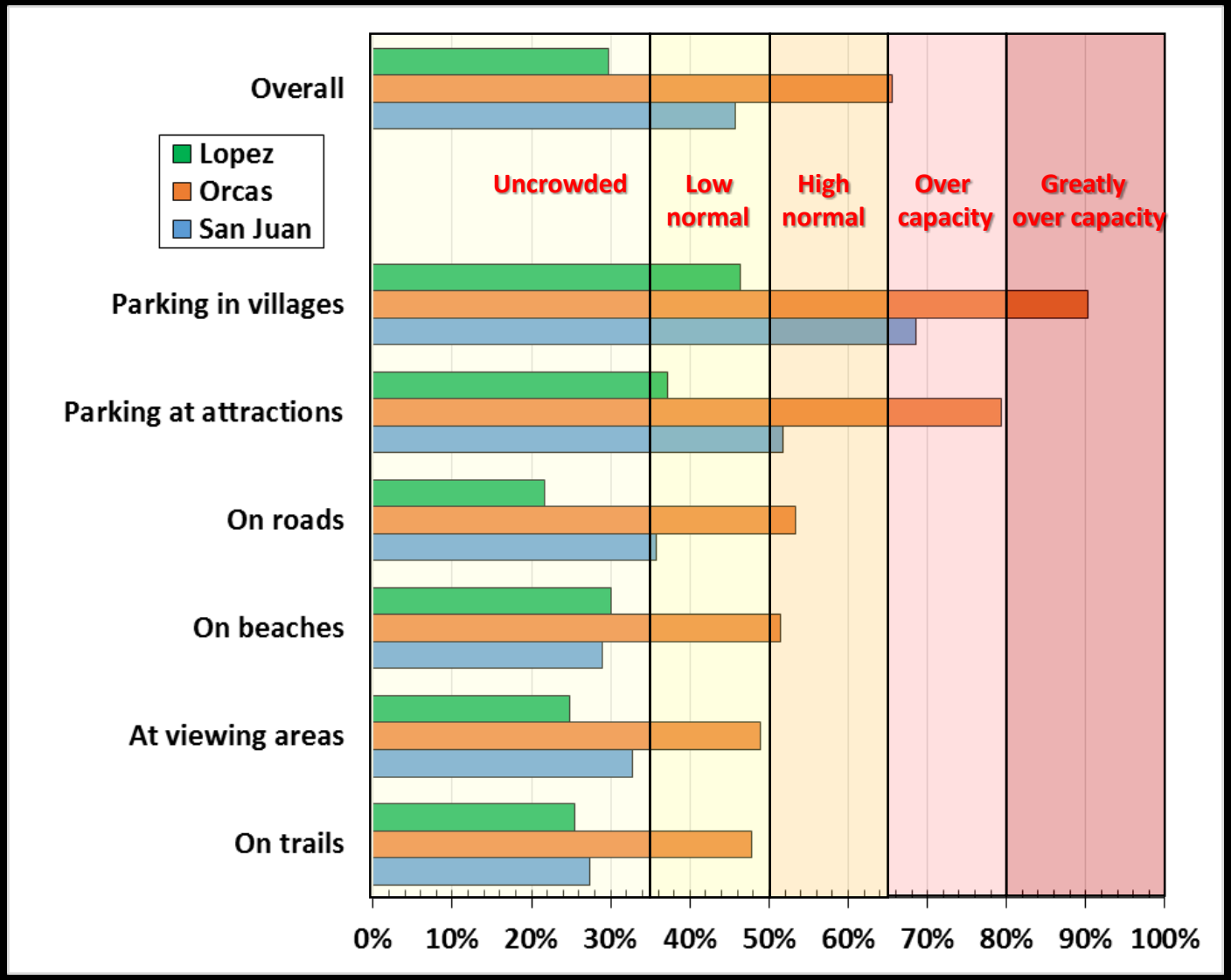
Percent of all ferry visitors feeling crowded



When parking their vehicles…especially in villages (over capacity)
Less crowding at destinations or while traveling

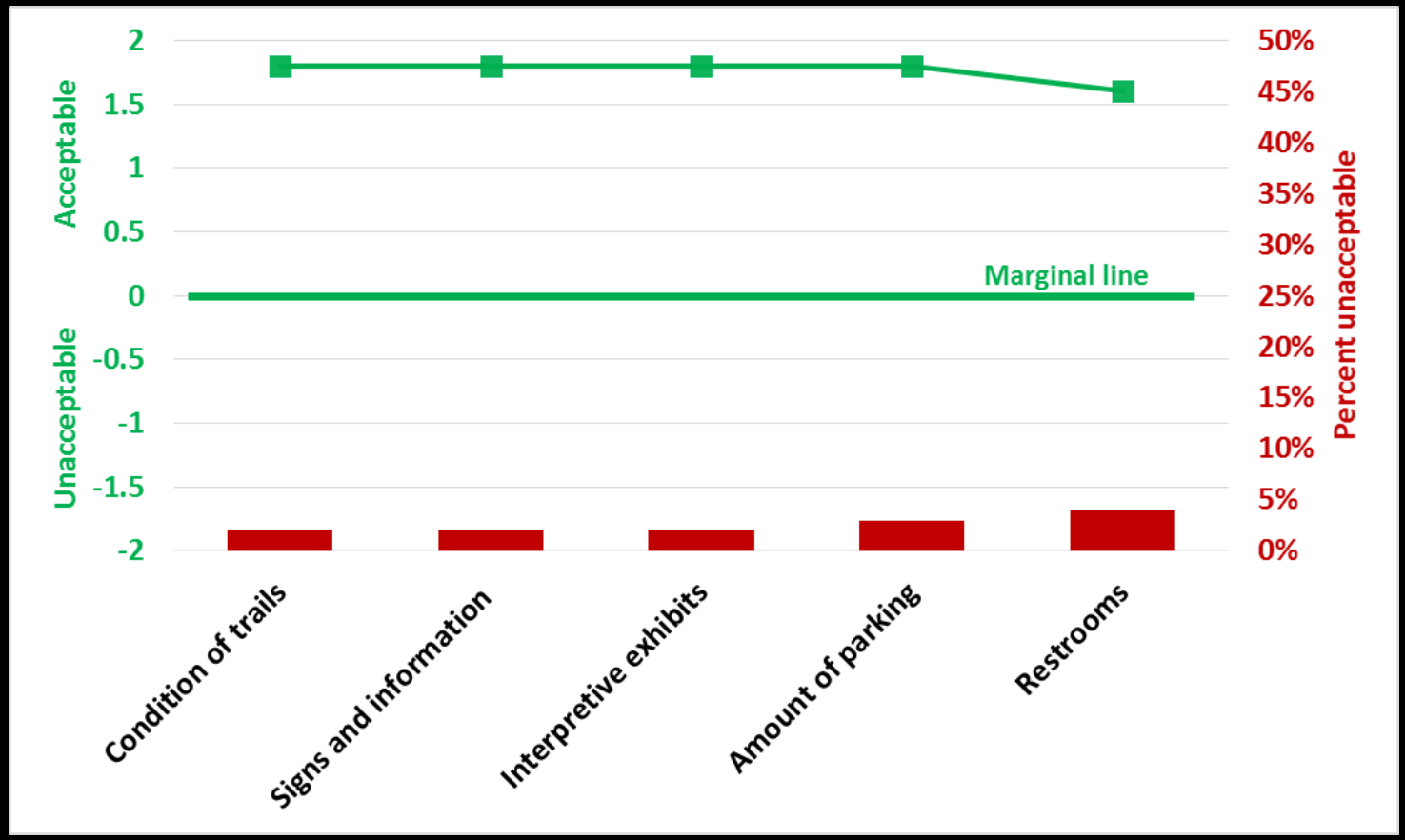
Percent of ferry visitors feeling crowded – comparing islands

From ferry survey



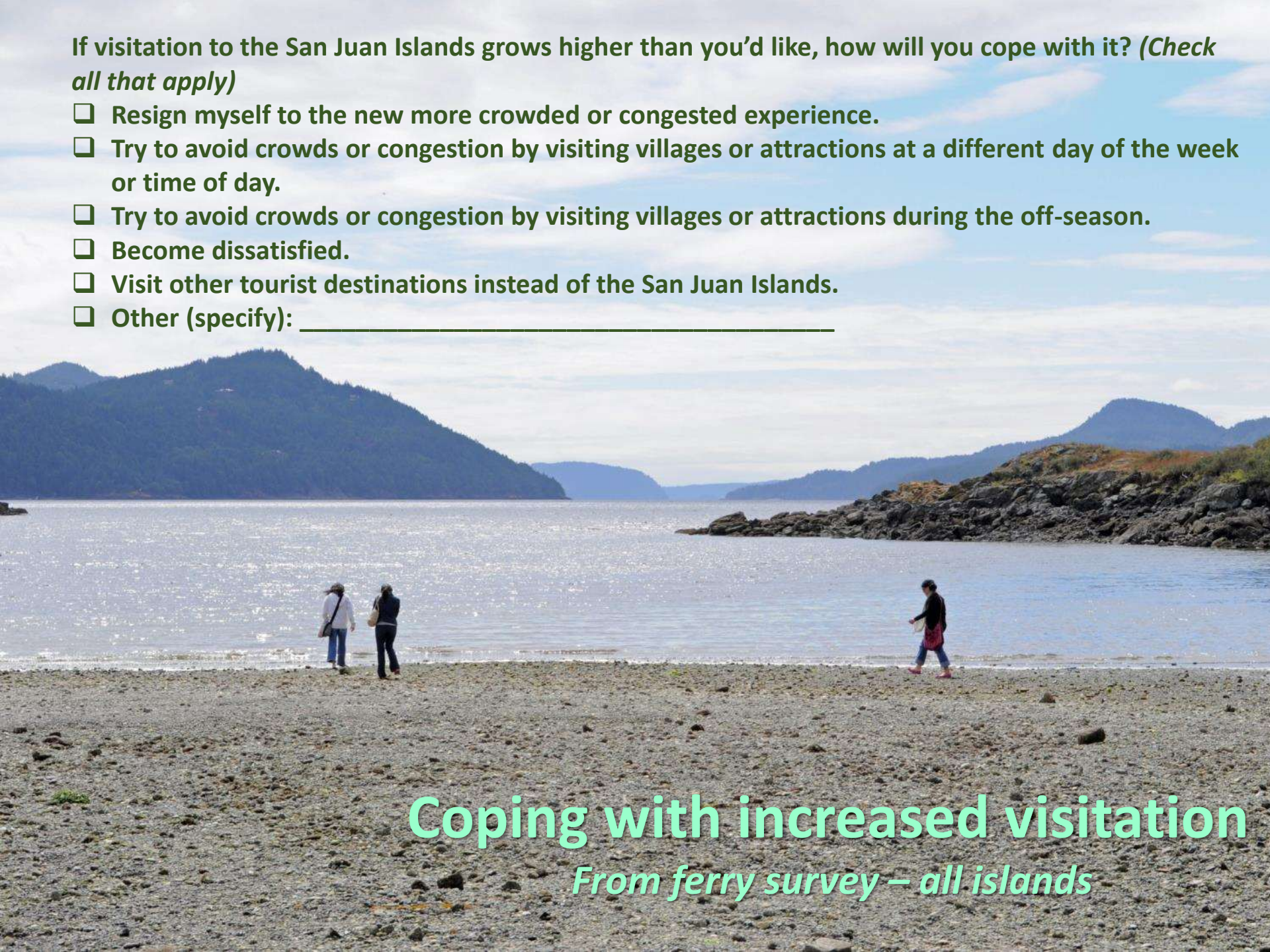
- Orcas > San Juan > Lopez for most contexts
- Parking in villages and at attractions > at destinations
- Relative rank of contexts is similar for all islands
- Overall ratings are median between highest and lowest

San Juan Island – Rating conditions and facilities (all sites)



Even higher ratings than other islands

Lowest rating at any site – restrooms at Lime Kiln (1.4)



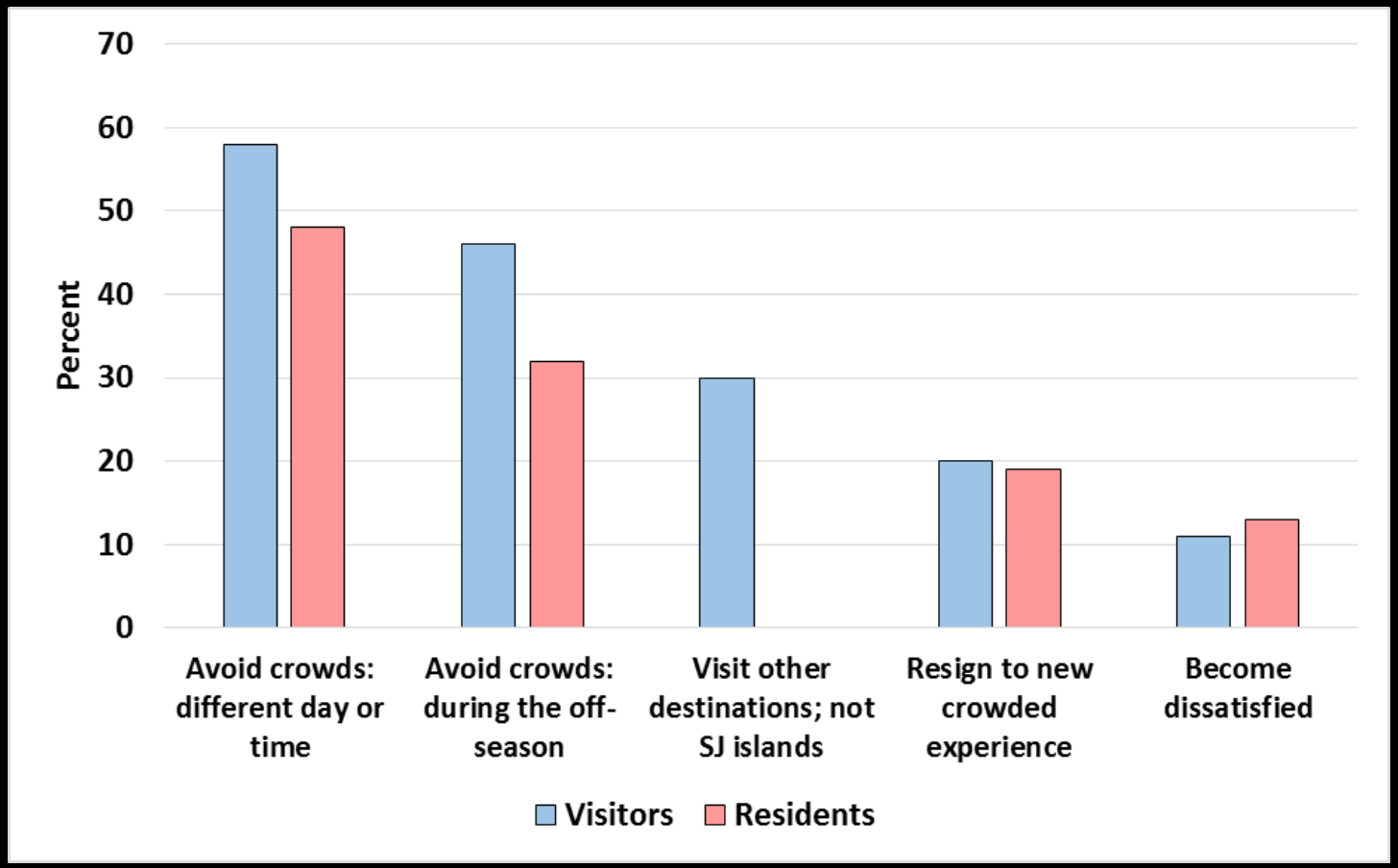
If visitation to the San Juan Islands grows higher than you'd like, how will you cope with it? *(Check all that apply)*

- ❑ Resign myself to the new more crowded or congested experience.
- ❑ Try to avoid crowds or congestion by visiting villages or attractions at a different day of the week or time of day.
- ❑ Try to avoid crowds or congestion by visiting villages or attractions during the off-season.
- ❑ Become dissatisfied.
- ❑ Visit other tourist destinations instead of the San Juan Islands.
- ❑ Other (specify): _____

Coping with increased visitation

From ferry survey – all islands

Coping with increased visitation



Similar pattern for visitors and residents

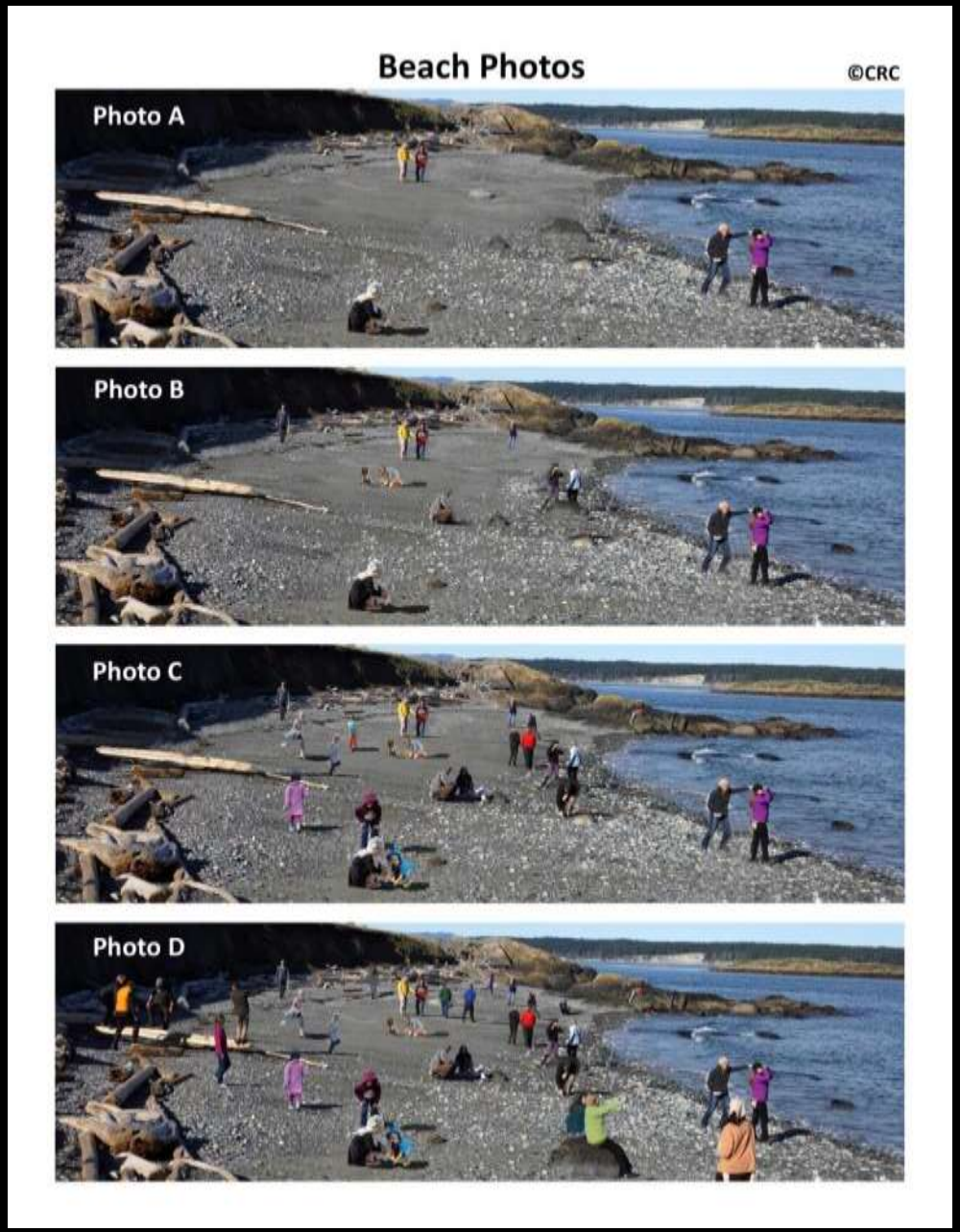
Displacement: temporal in-season > off-season > inter-site spatial

Displacement > product shift – lower “resign” than Rogue (34%), similar to Kenai (23%)

Lowest: choosing not to cope – lower than Kenai (21%)

Evaluations of use levels

Ferry survey

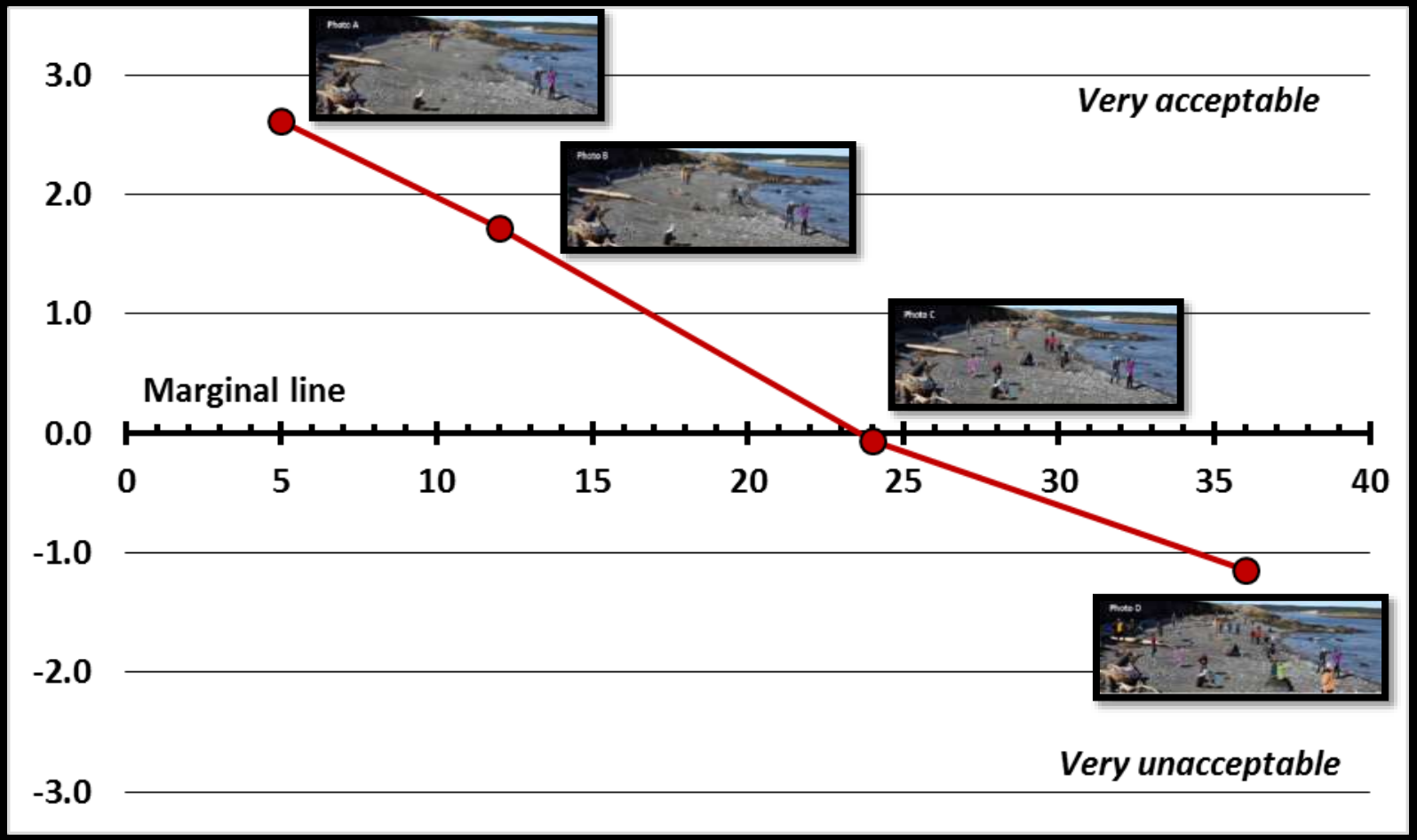


Evaluating use at beaches

Ferry survey

"For the beaches you visited, please rate the acceptability of use levels shown in Photos A, B, C, and D."

Evaluating beach densities: All respondents

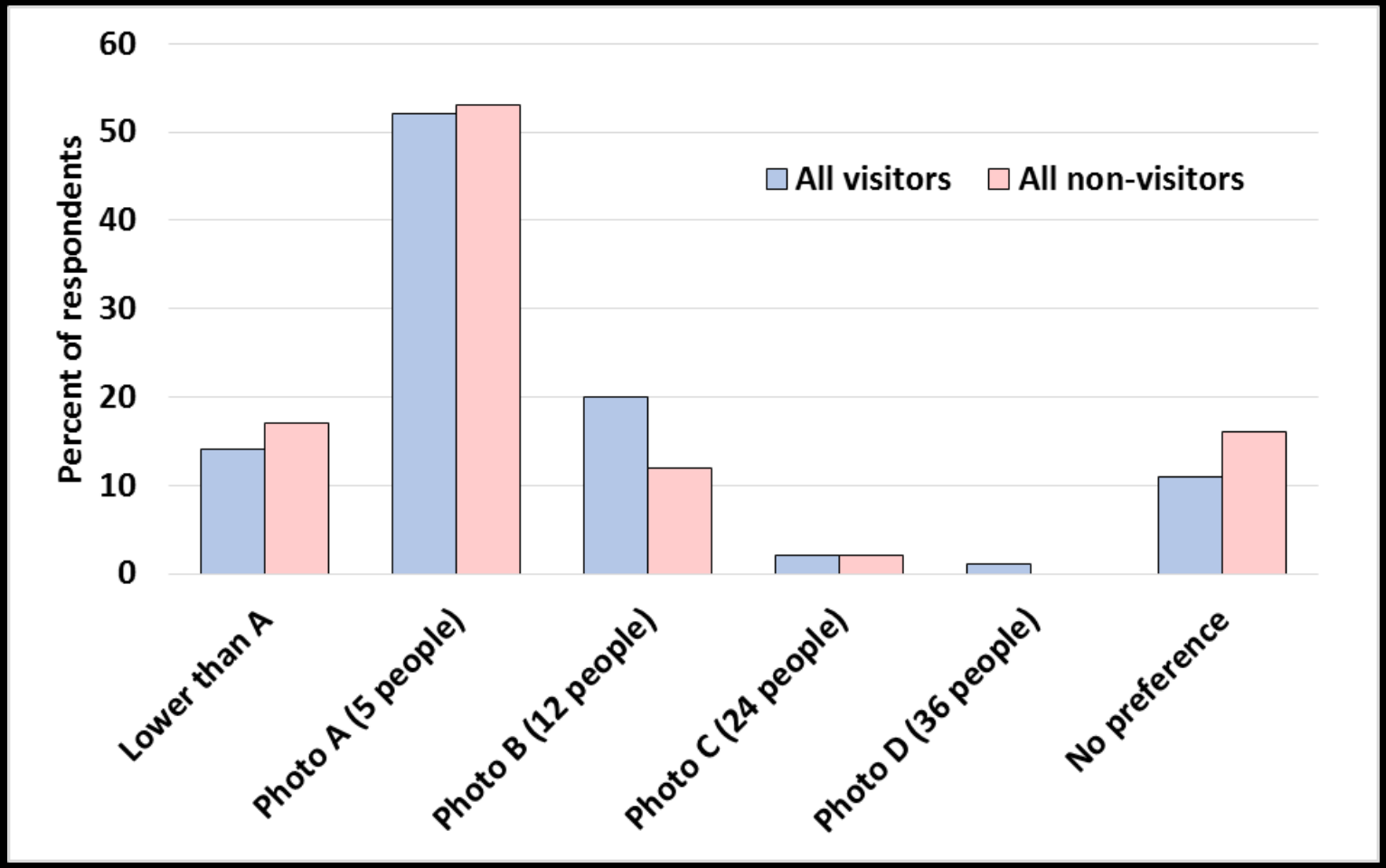


5 and 12 people acceptable; 24 at margin; 36 clearly unacceptable

No statistical differences between islands or visitors/residents

Evaluating beach densities: Preferences

"…the number of people you prefer to see"

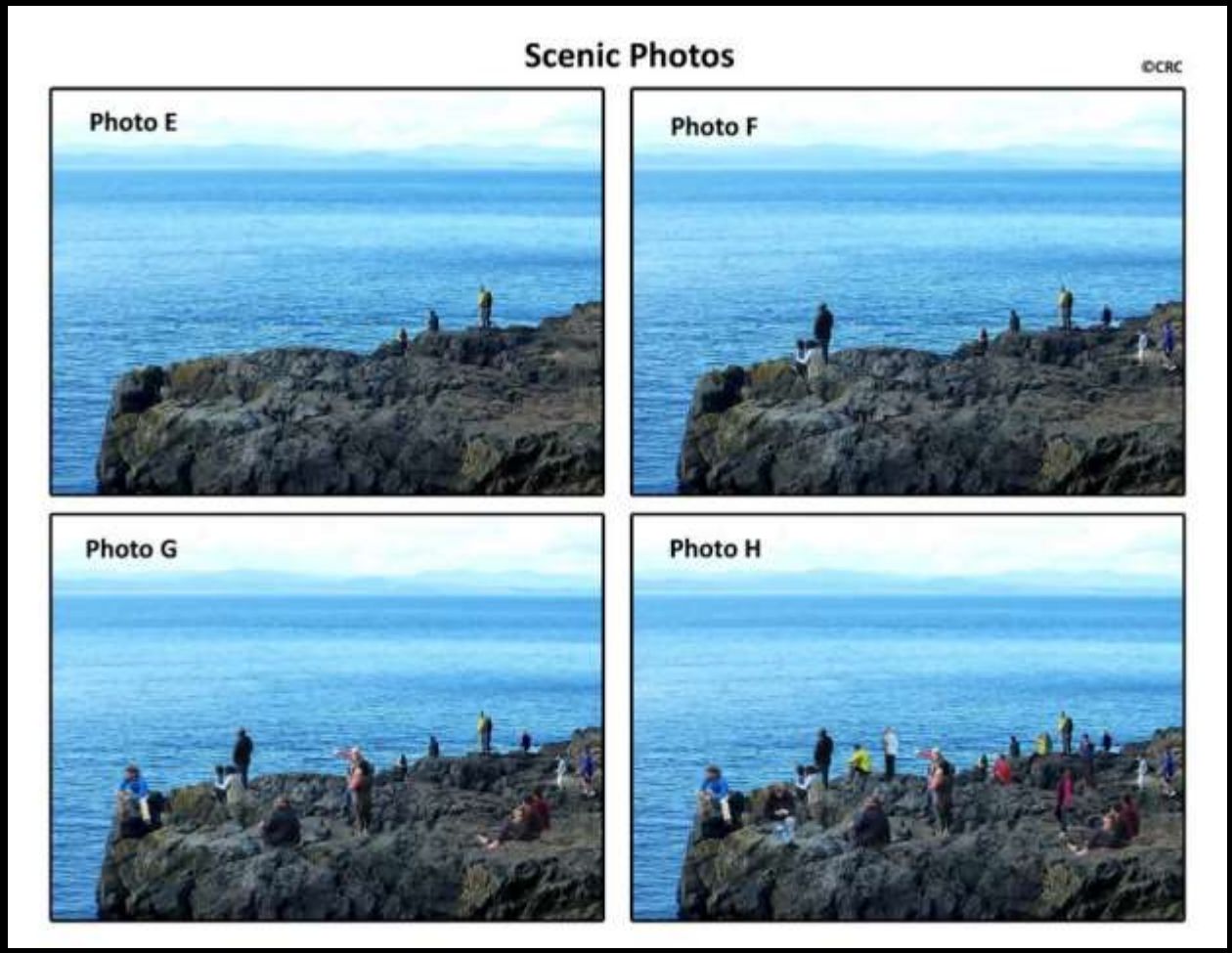


Majorities prefer Photo A; few prefer higher use in Photos C and D

Few differences between visitors and residents

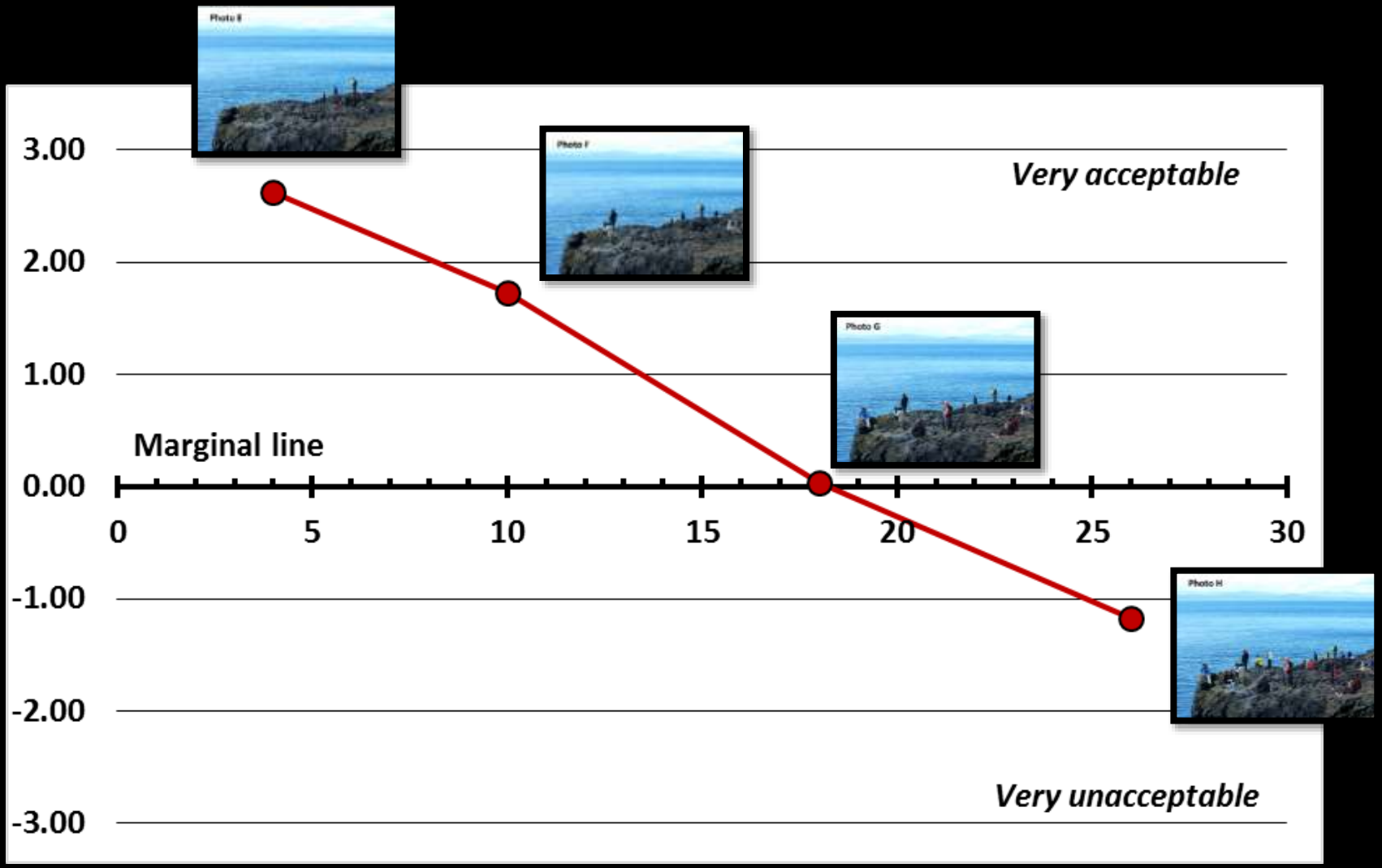
Island differences small; slightly more Lopez prefer A

Evaluating use at marine wildlife viewing area



“For the marine wildlife viewing areas you visited, please rate the acceptability of use levels shown in Photos E, F, G, and H.”

Evaluating marine viewing densities: All respondents



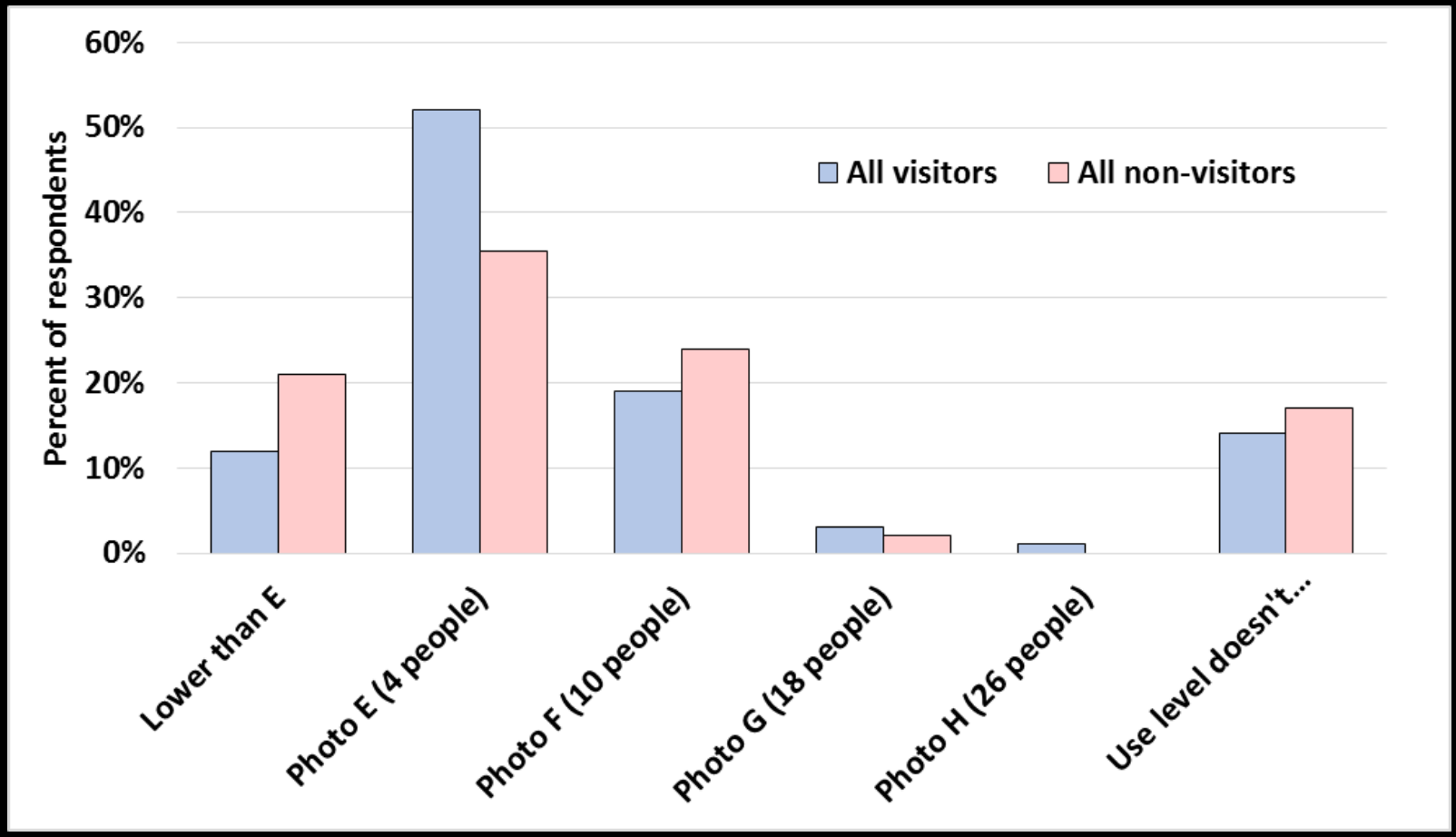
4 and 10 people acceptable; 18 at margin; 26 clearly unacceptable

Few statistical differences between islands or visitors/residents

But Lopez rated 18 people more negatively than San Juan & Orcas

Evaluating marine viewing area densities: Preferences

"…the number of people you prefer to see"



Majorities prefer Photo E; few prefer higher use in Photos G and H

Few differences between visitors and residents

Island differences small

Support for management actions

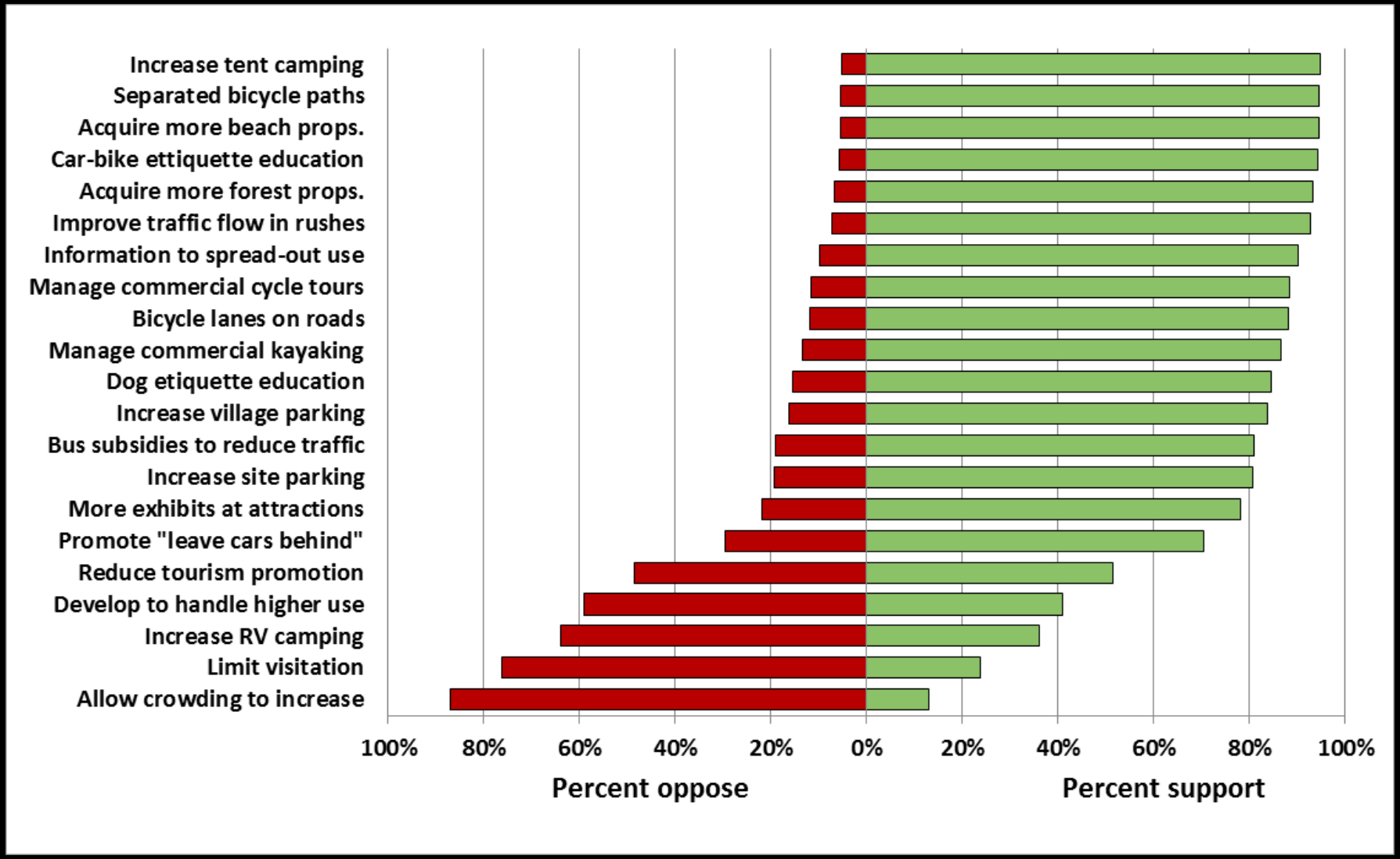
Ferry survey

Support for management actions

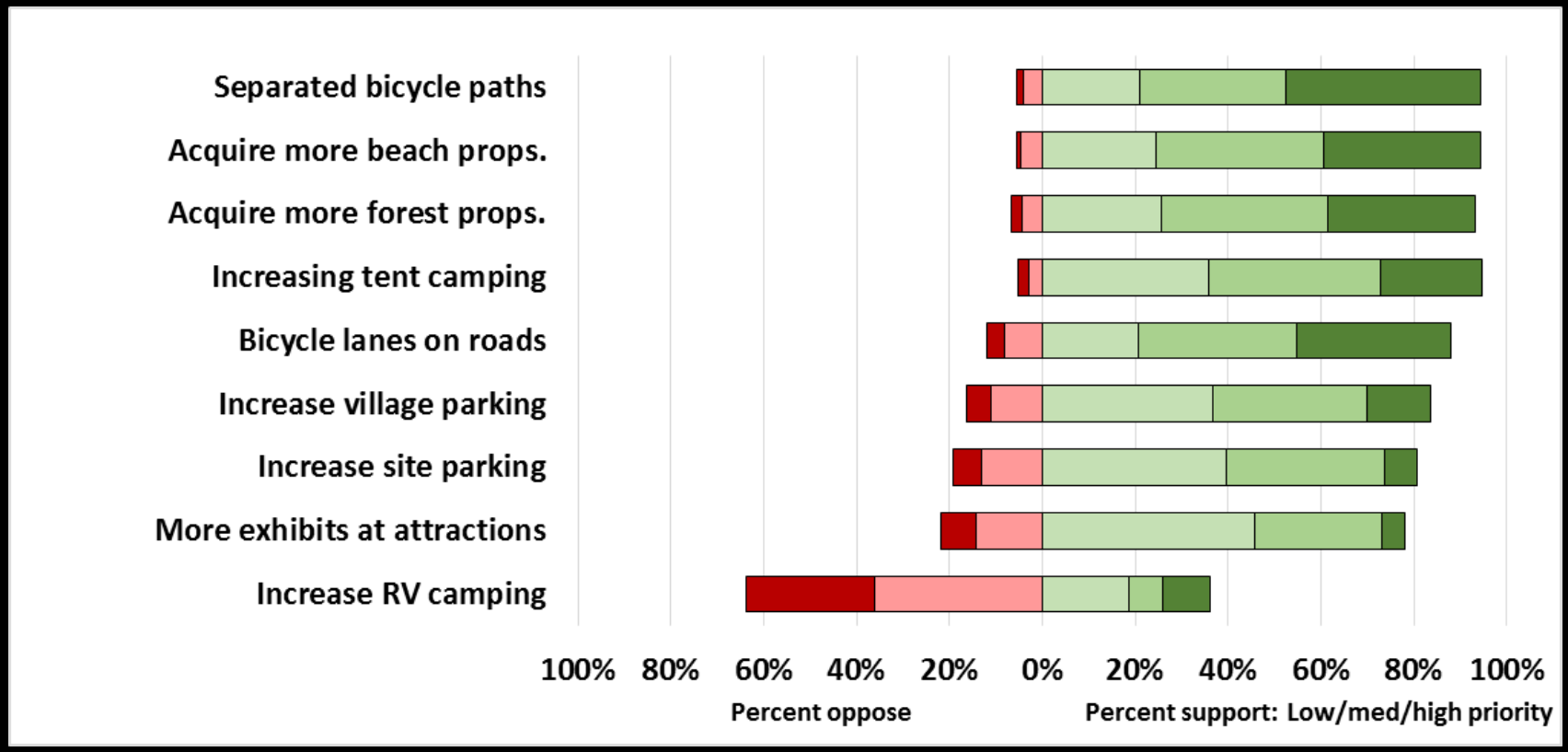
21 different actions

"Please tell us if you support or oppose the following actions that might be used to improve tourism in the San Juan Islands. If you support an action, identify whether it should be a low, medium, or high priority."

Support for management actions among all visitors

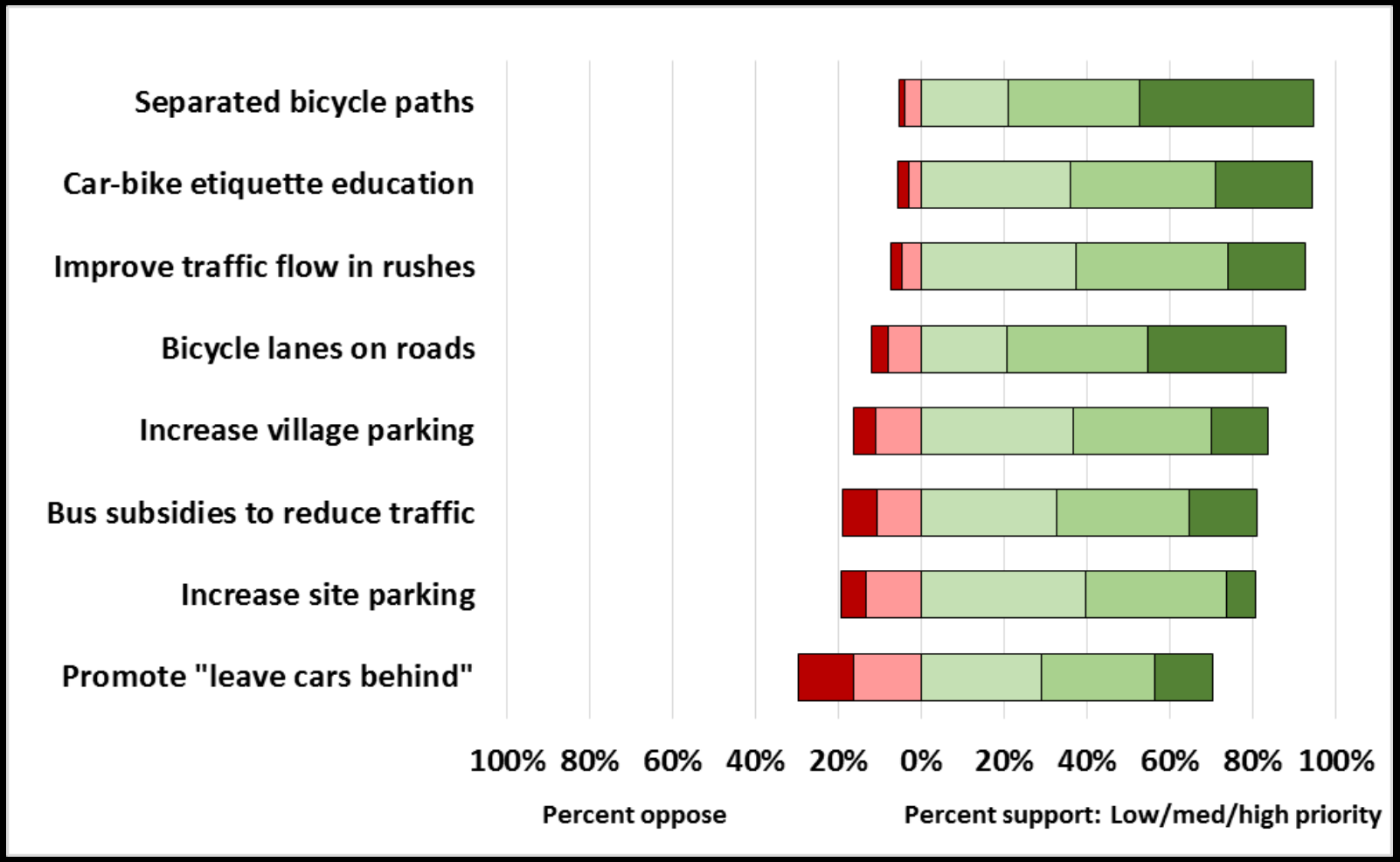


Highest priority acquisition/infrastructure actions among visitors



More public land – shore > forest/mountain properties
Separated bicycle lanes > roadside bike lanes
Village parking > site parking
More camping
Interpretive exhibits are lower priority

Highest priority transportation actions among visitors



Visitors support them all

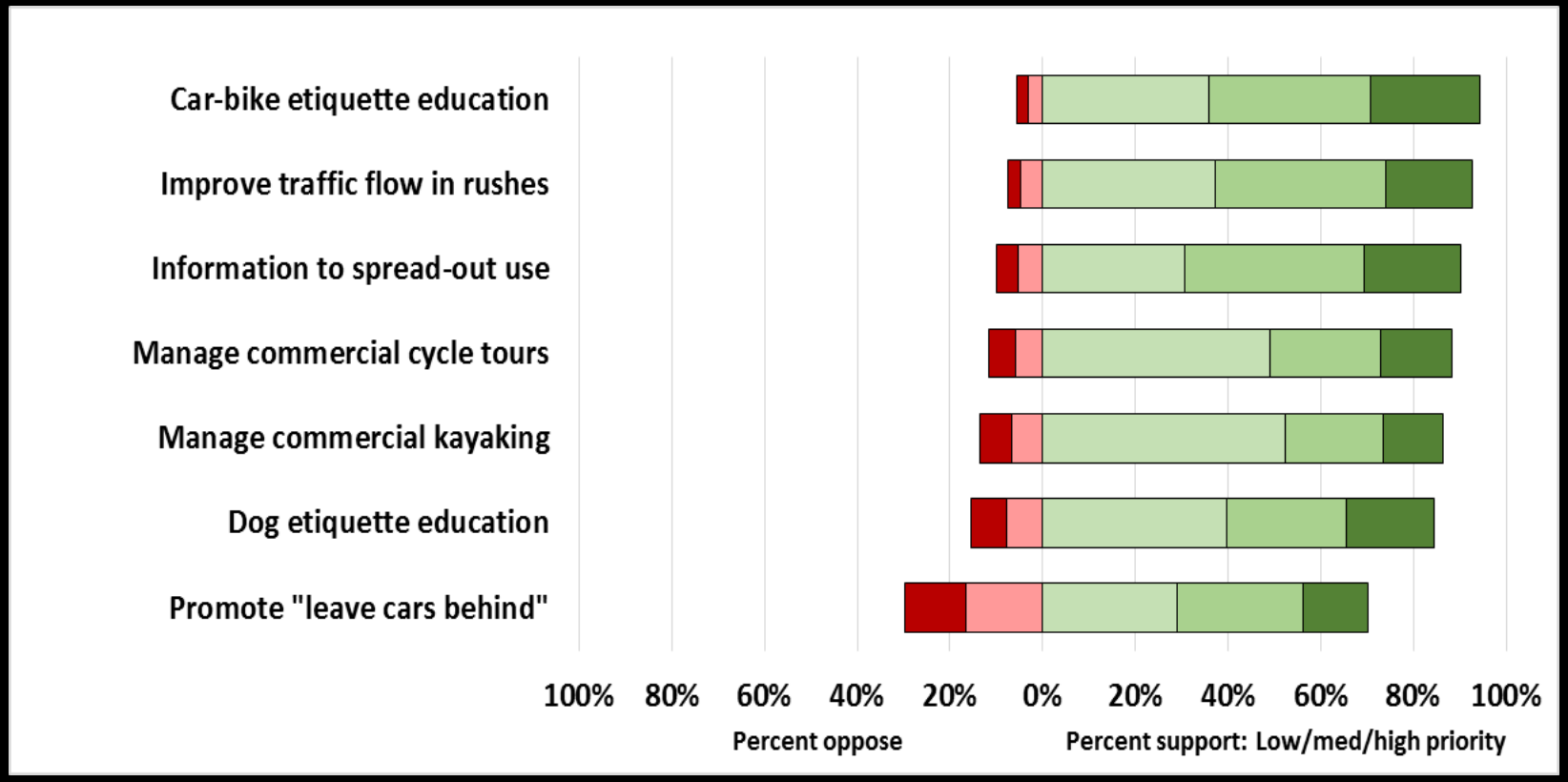
Separated bike paths > etiquette > bicycle lanes on roads

Improve traffic management in ferry rushes

Village parking > site parking

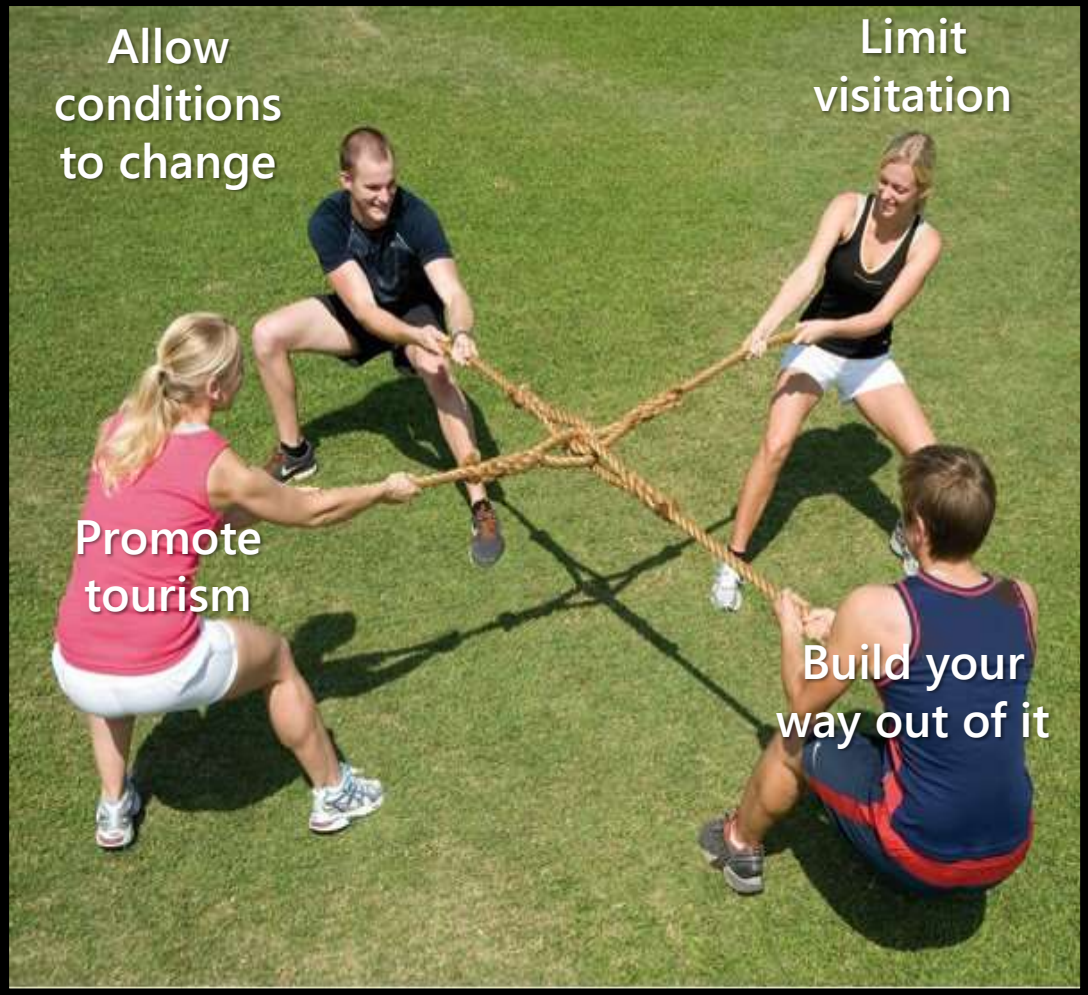
Bus subsidies > “leave cars behind”

Highest priority education actions among visitors

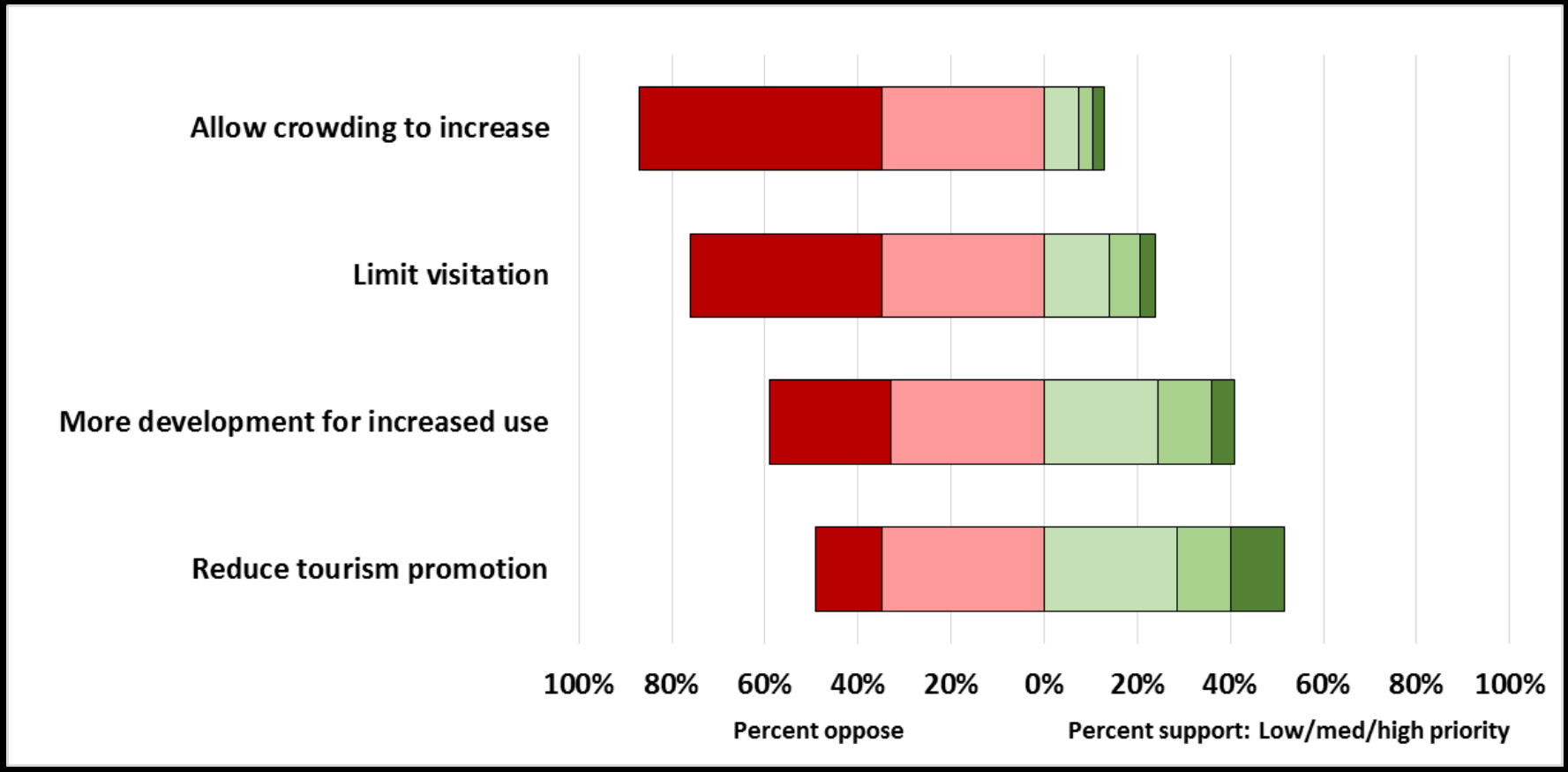


Visitors support them all
Lowest priority is promote “leave cars behind”

Management strategies & trade-offs



Tradeoff strategies – Which do visitors support?



Strongest opposition (87%) to the default strategy: allow increase
Majority opposition to limit visitation (76%)
Majority opposition for “building out of it” (59%)
Mixed opinion toward reducing promotion

Major themes

Tourism is here, may increase

Ferry and accommodations have greater capacity

Everybody wants high quality experiences

Data can help identify and quantify issues, standards, and strategies

They're your islands – need to manage by design, not default

Questions or comments