

Findings from the San Juan Islands Visitor Study for Terrestrial Managers

Presented on Wednesday, February 28th
at the San Juan County Fairgrounds in Friday Harbor, WA



Confluence Research and Consulting

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San Juan Islands Visitor Study

Special Edition
February 28, 2018

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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

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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

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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



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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



San Juan Islands Study • Ferry Survey

Please print name _____ Date _____

1. For residents, please enter the number of days you spent on each island and check all the outdoor recreation locations you visited on this San Juan Islands trip. For residents, enter the number of days spent and check islands you visited in the past week.

Days on San Juan Islands	Days on Orcas Island	Days on Lopez Island
<input type="checkbox"/> Jackson Beach to Friday Harbor <input type="checkbox"/> Fourth of July Beach and trails <input type="checkbox"/> American Camp Visitor Center & buildings <input type="checkbox"/> South Beach <input type="checkbox"/> Castle Point Lighthouse - beaches <input type="checkbox"/> English Cove <input type="checkbox"/> Westside Scenic Preserve overlooks <input type="checkbox"/> County Park / Little Beach Park <input type="checkbox"/> Michael Hill trails <input type="checkbox"/> Young Hill trails <input type="checkbox"/> English Camp gardens and buildings <input type="checkbox"/> Roche Harbor trails <input type="checkbox"/> Reuben Tabor County Park <input type="checkbox"/> Other _____	<input type="checkbox"/> Deer Harbor Westside Preserve <input type="checkbox"/> Timberlake Mountain trails <input type="checkbox"/> North Beach Shore Access <input type="checkbox"/> Westside Park in Eastwood <input type="checkbox"/> Judd Cove Preserve <input type="checkbox"/> Cascade Lake in Moron State Park <input type="checkbox"/> Mt. Constitution in Moron State Park <input type="checkbox"/> Hiking trails in Moron State Park <input type="checkbox"/> Chabachan Pass State Park <input type="checkbox"/> Other _____	<input type="checkbox"/> Upright Head - ferry landing <input type="checkbox"/> Cedar County Park <input type="checkbox"/> Fisherman Spit <input type="checkbox"/> Hummel Linn <input type="checkbox"/> Lopez Hill trails <input type="checkbox"/> Apple Reef Sanctuary <input type="checkbox"/> Adams Beach County Park <input type="checkbox"/> Adams Point <input type="checkbox"/> Wardsburg Bay <input type="checkbox"/> Columbia River <input type="checkbox"/> Spencer Spit State Park <input type="checkbox"/> Other _____

Outdoor recreation activities

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

Days on other islands (please specify)
<input type="checkbox"/> Hiking on trails <input type="checkbox"/> Kayaking / canoeing <input type="checkbox"/> Canoeing / kayaking with a guide <input type="checkbox"/> Nature watching / sightseeing from shore <input type="checkbox"/> Nature watching / sightseeing from a private boat <input type="checkbox"/> Fishing (on a charter) <input type="checkbox"/> Fishing (on a private boat) <input type="checkbox"/> Hiking along beaches or nature shorelands <input type="checkbox"/> Bicycling with a tour group <input type="checkbox"/> Bicycling with your bike or a rented bike <input type="checkbox"/> Beachcombing <input type="checkbox"/> Swimming <input type="checkbox"/> Other _____

Did you make a reservation for this ferry? (Please check "yes" or "no" and check the boxes that apply)

Yes - and no reservation was made for my first choice date and time	No - I did not make a reservation for this ferry
<input type="checkbox"/> Yes - and no reservation was made for my first choice date and time	<input type="checkbox"/> No - I did not make a reservation for this ferry
<input type="checkbox"/> Yes - and no reservation was made for a different date than my first choice	<input type="checkbox"/> No - I did not make a reservation for this ferry
<input type="checkbox"/> Yes - and no reservation was made for a different time than my first choice	<input type="checkbox"/> No - I did not make a reservation for this ferry
<input type="checkbox"/> Yes - and no reservation was made for a different date and time	<input type="checkbox"/> No - I did not make a reservation for this ferry
<input type="checkbox"/> Yes - and no reservation was made for a different time than my first choice	<input type="checkbox"/> No - I did not make a reservation for this ferry

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

631 visitors

141 residents/other

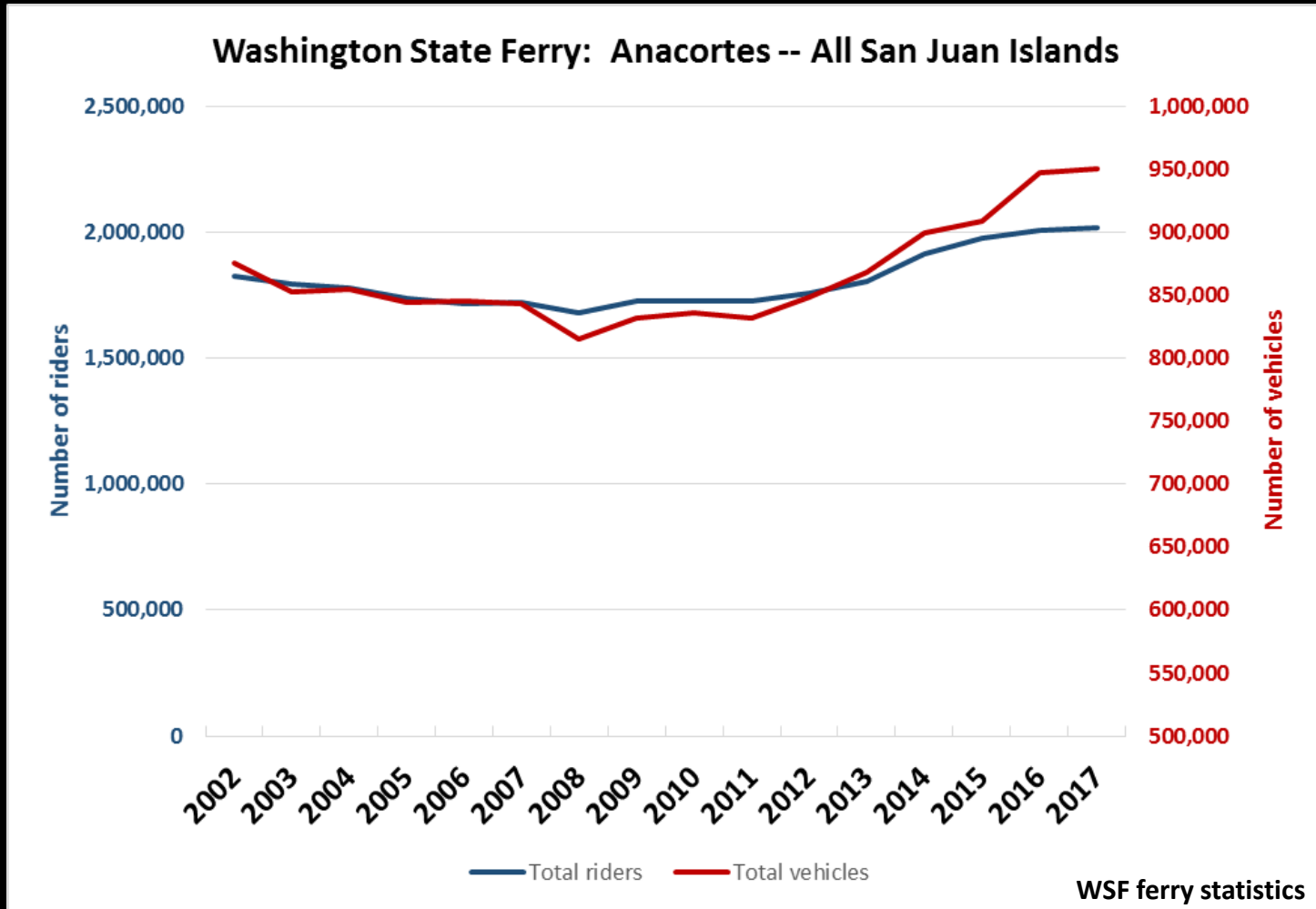
Getting to the islands

WSF stats , web-information, & interviews



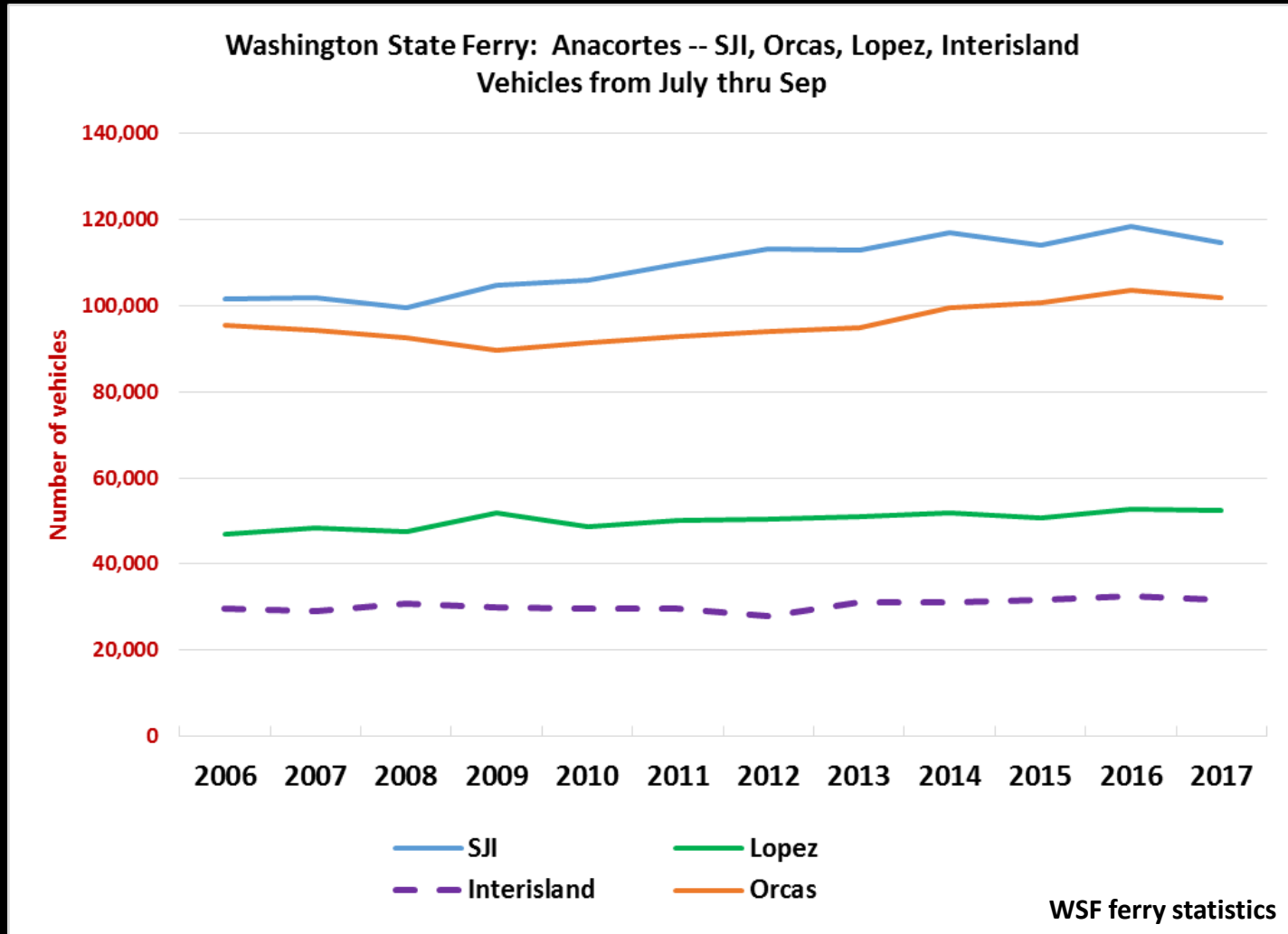
Long term year-round WSF trends – all islands

Riders and vehicles



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

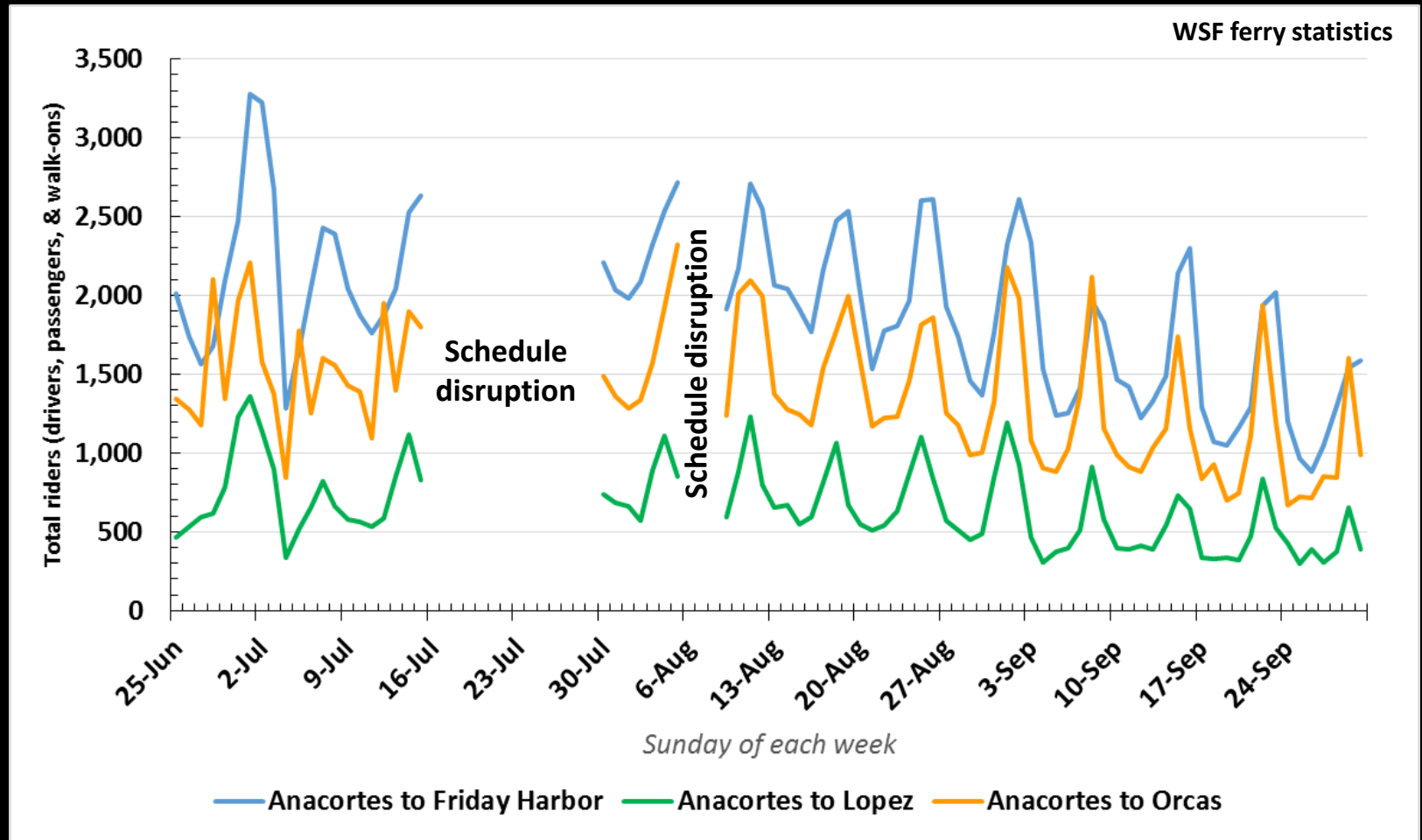
Long term summer WSF vehicle trends by islands



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

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



Summer effect; weekend effect, holiday effect
San Juan Island > Orcas > Lopez

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Ferry capacities



Larger

144 vehicles

2,000 passengers

124

1,200

Smaller

64

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

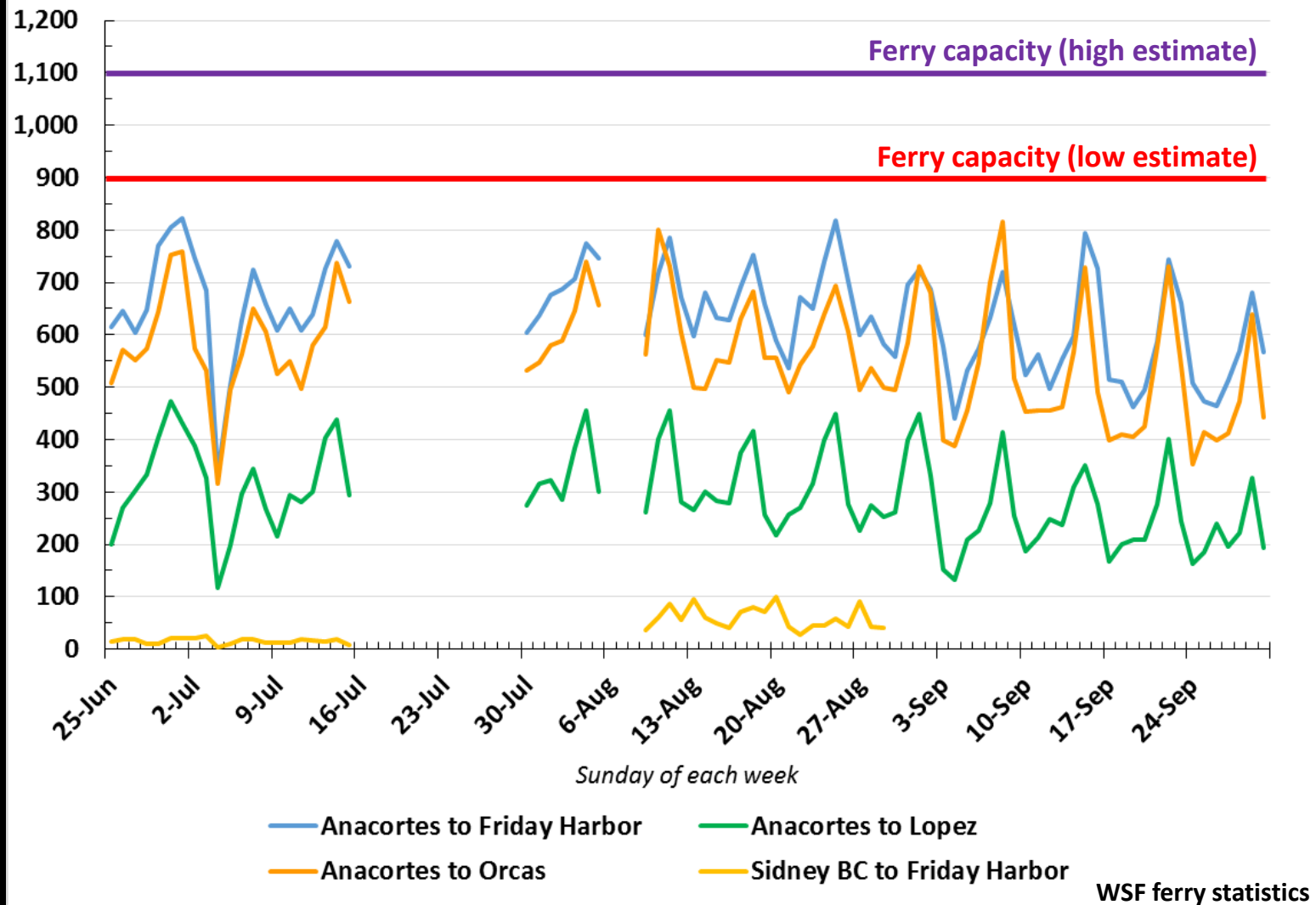
Per day capacity: ~800 to 1,000

Lopez –

- 5 direct from Anacortes + 2 to 3 with

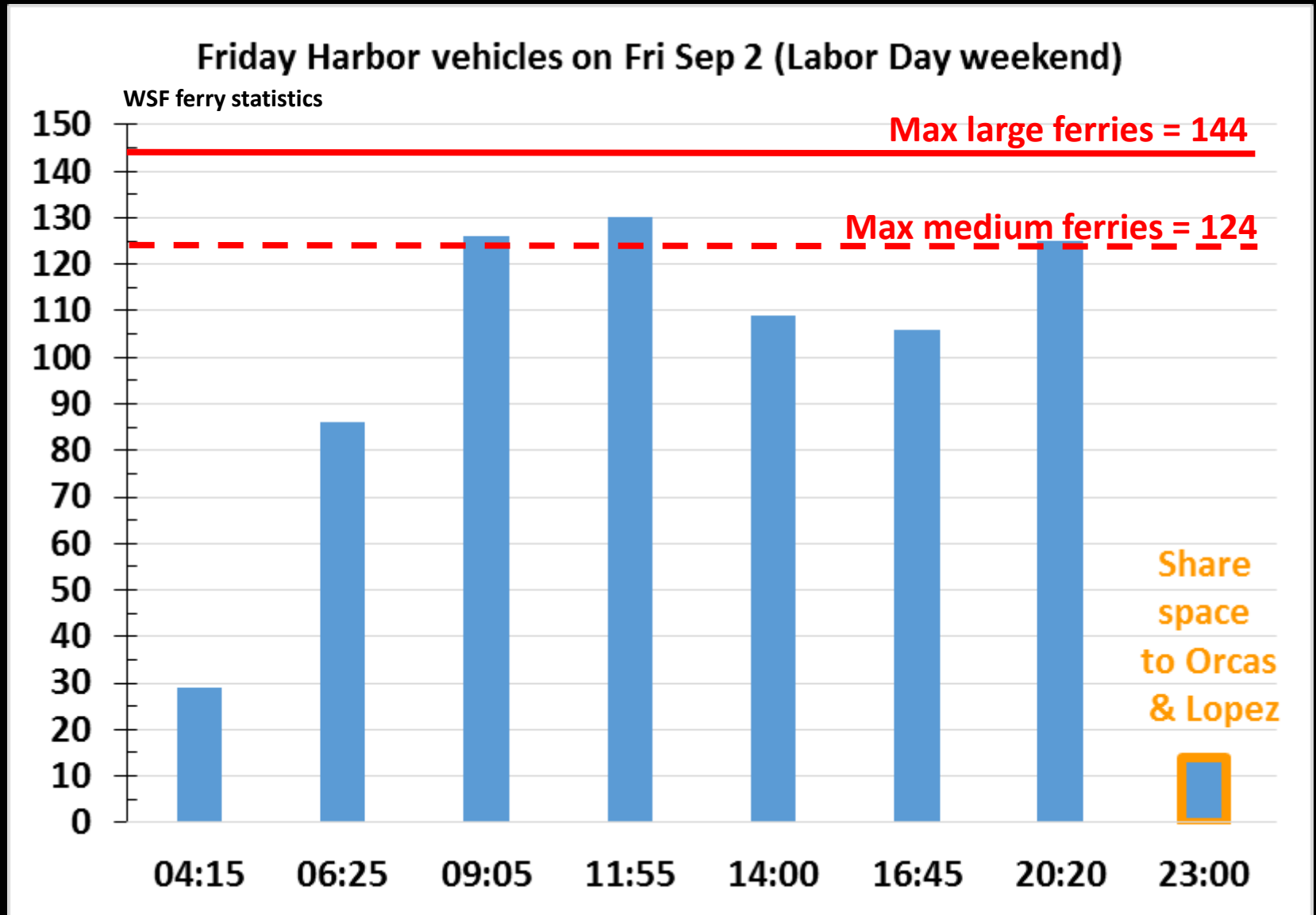
Per day capacity: ~500 to 700

Vehicles per day by island 2017



San Juan and Orcas > Lopez
Consistent weekend peak pattern
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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

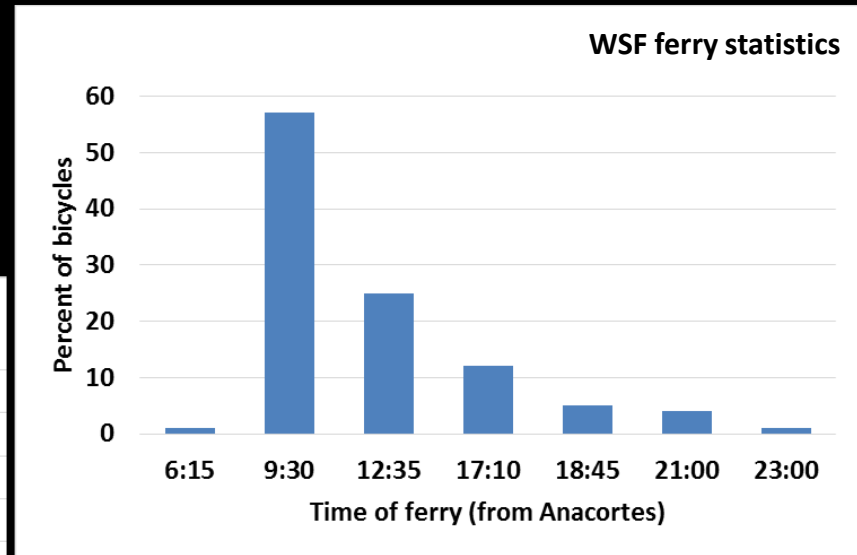
Unused space on ferries for vehicles...and unused space in vehicles

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

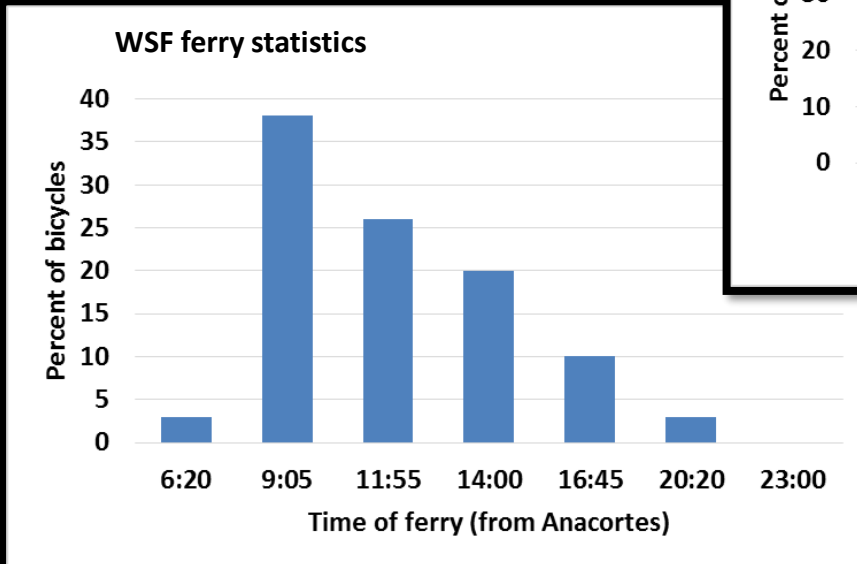
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Ride-on bicycles: Percent by time of day

Anacortes → Lopez

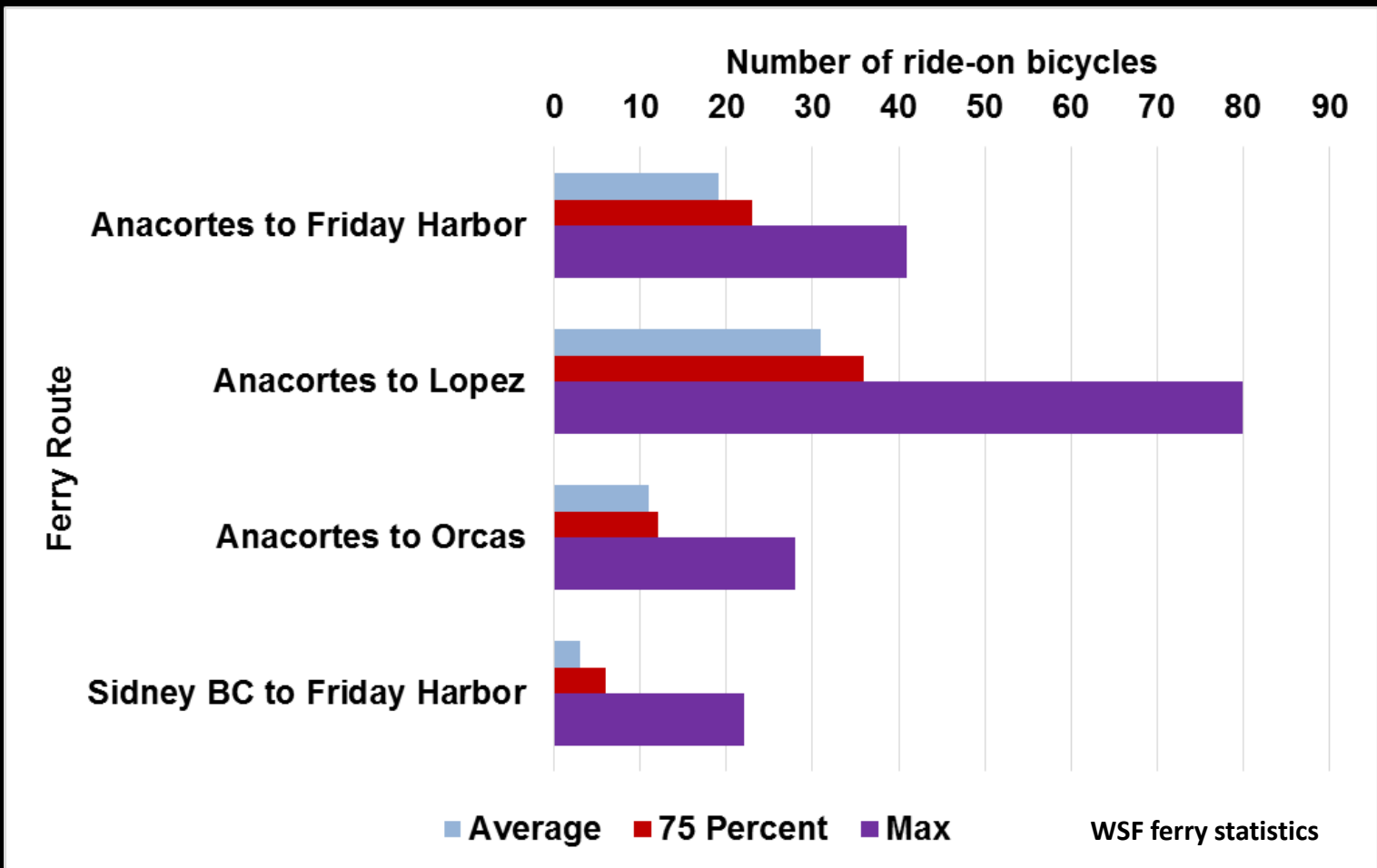


Anacortes → Friday Harbor



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

Ride-on bicycles per day on ferry routes (peak season)



Lopez > San Juan > Orcas

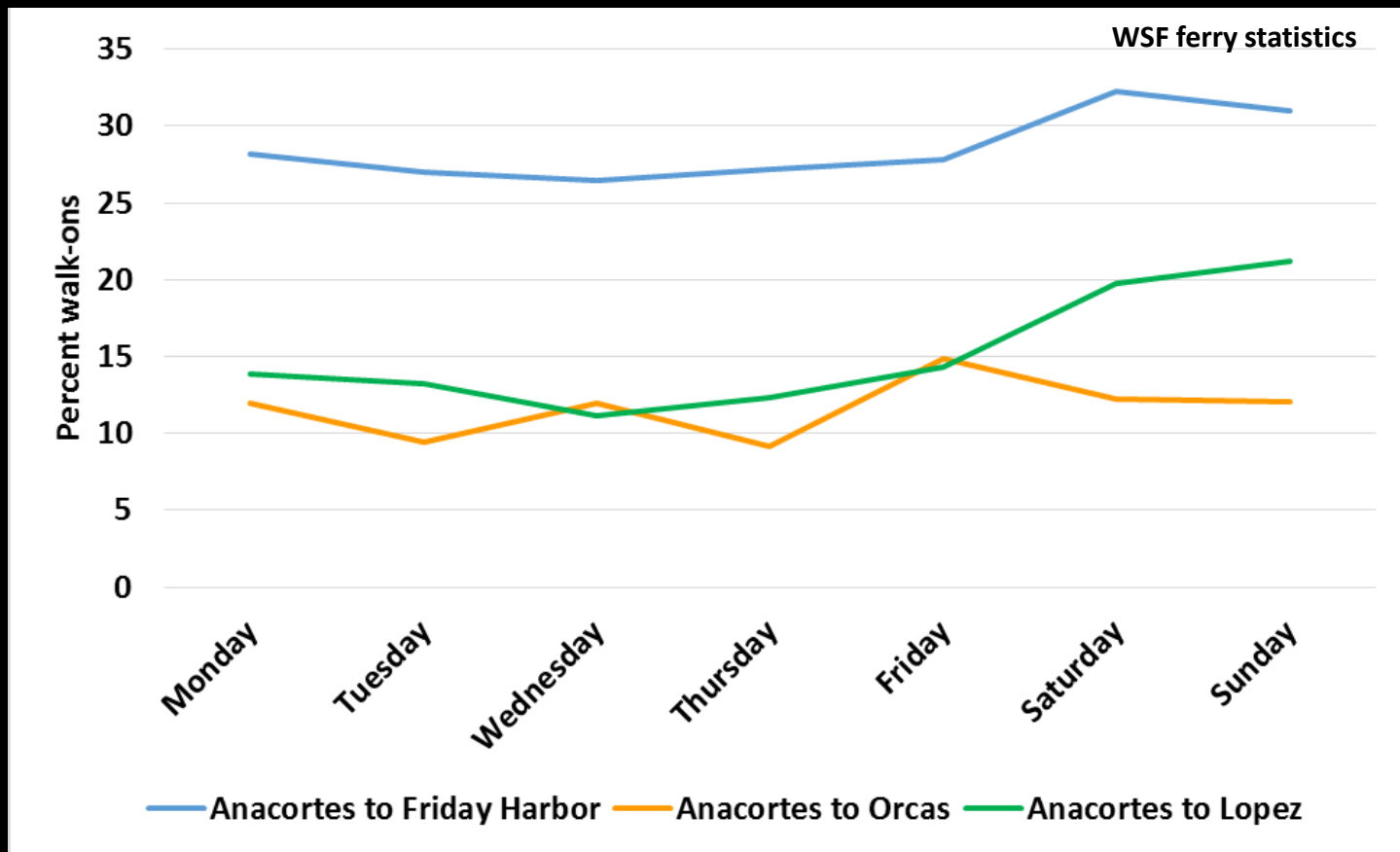
Peaks more than twice the averages

From limited FH 2017 in-person ferry counts: 9.8 bikes on cars / ferry

Car to bike ratio: 12 to 1

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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

Cruise ships

Infrequent day landings
<100 ppd



Private boats

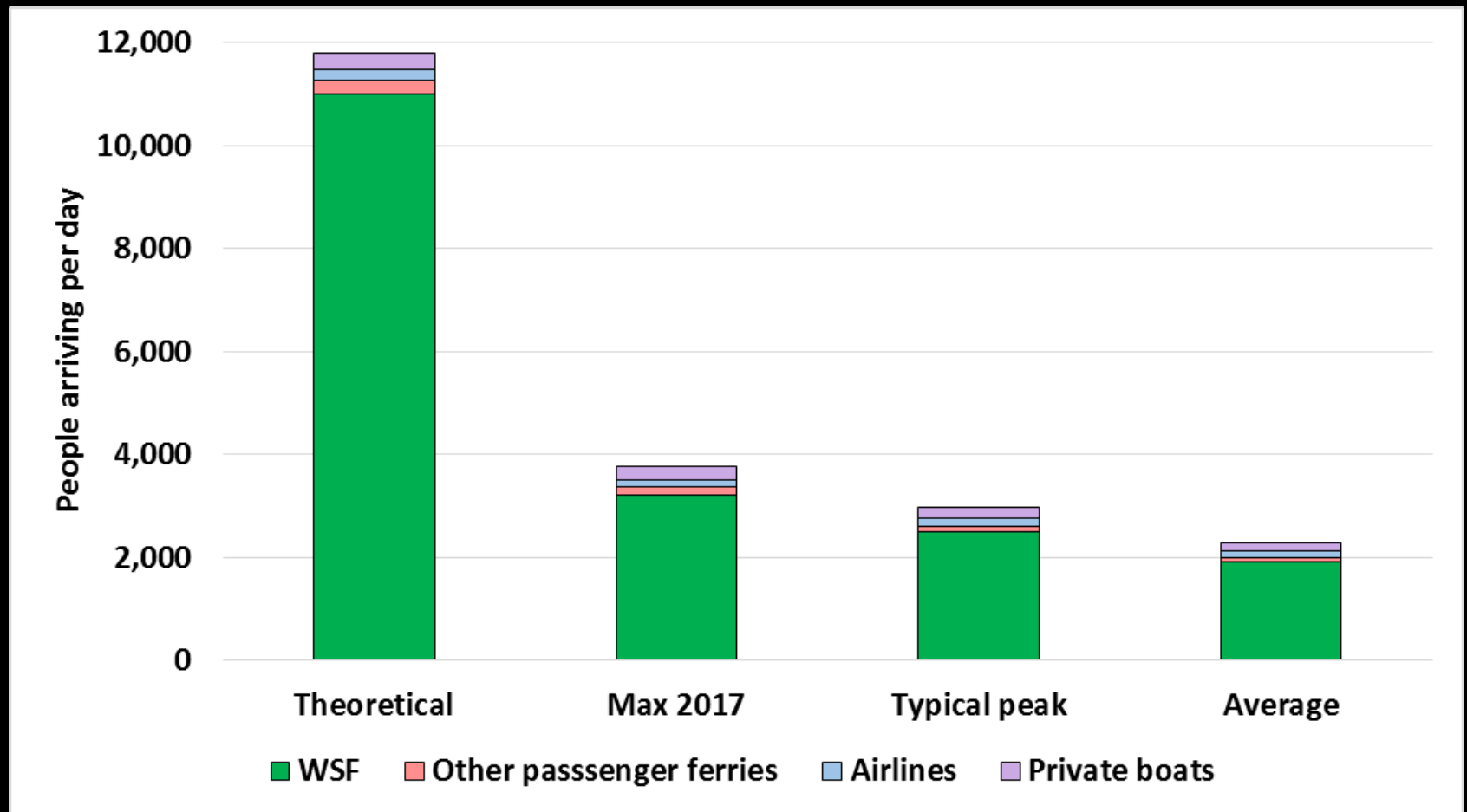



<2000 slips

<30% for cruisers (non-local)

Use estimate challenges

People per day from all sources (San Juan Island example)

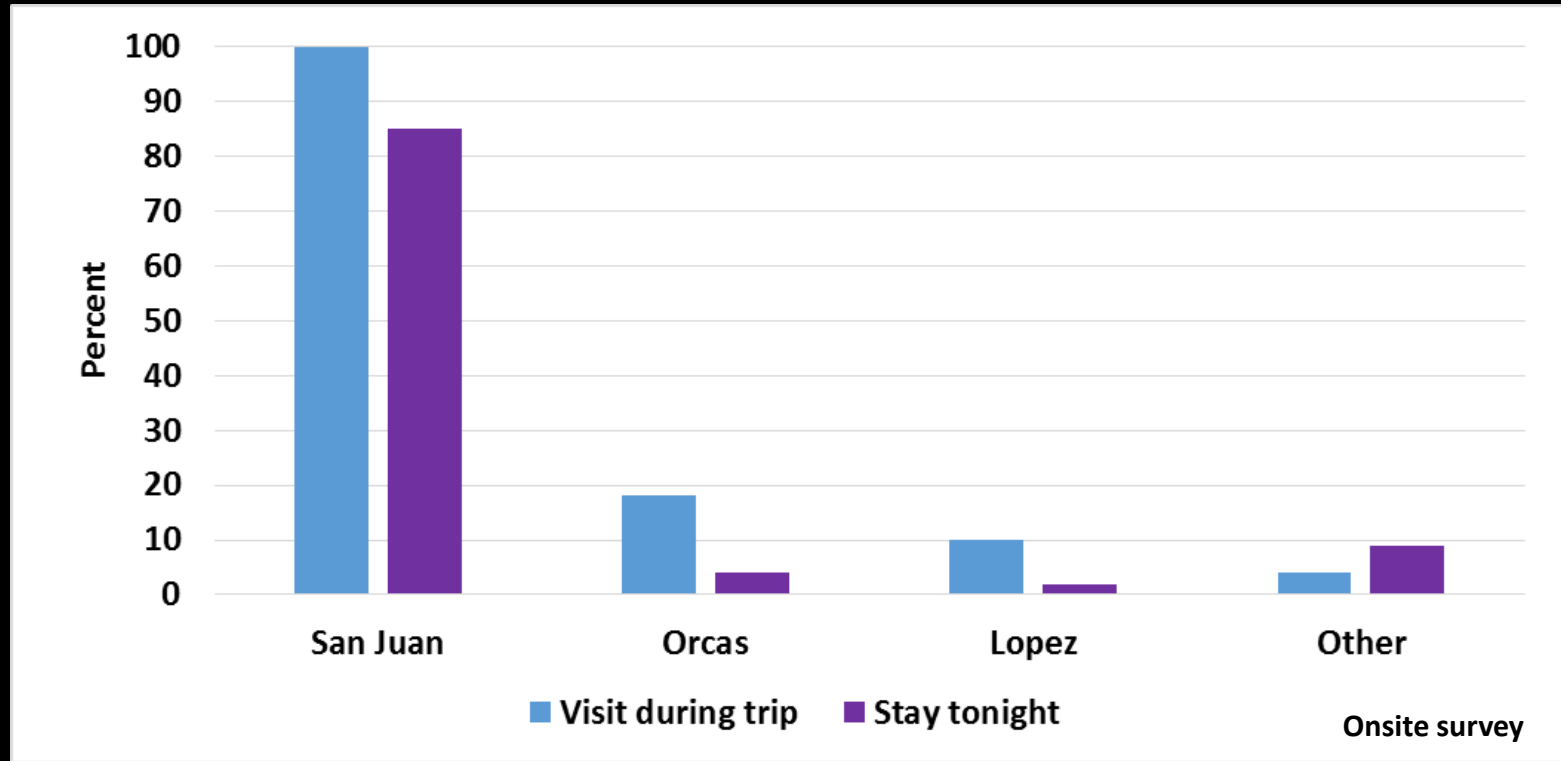


A photograph of a pebbly beach with two people walking along the shoreline. The water is blue and calm, with small waves lapping at the shore. The person on the left is wearing a dark jacket and pants, and the person on the right is wearing a yellow vest over a dark shirt and dark pants, carrying a white bag. The scene is captured from a high angle, showing the vast expanse of the water and the textured surface of the beach.

Who are they?

From onsite and ferry survey

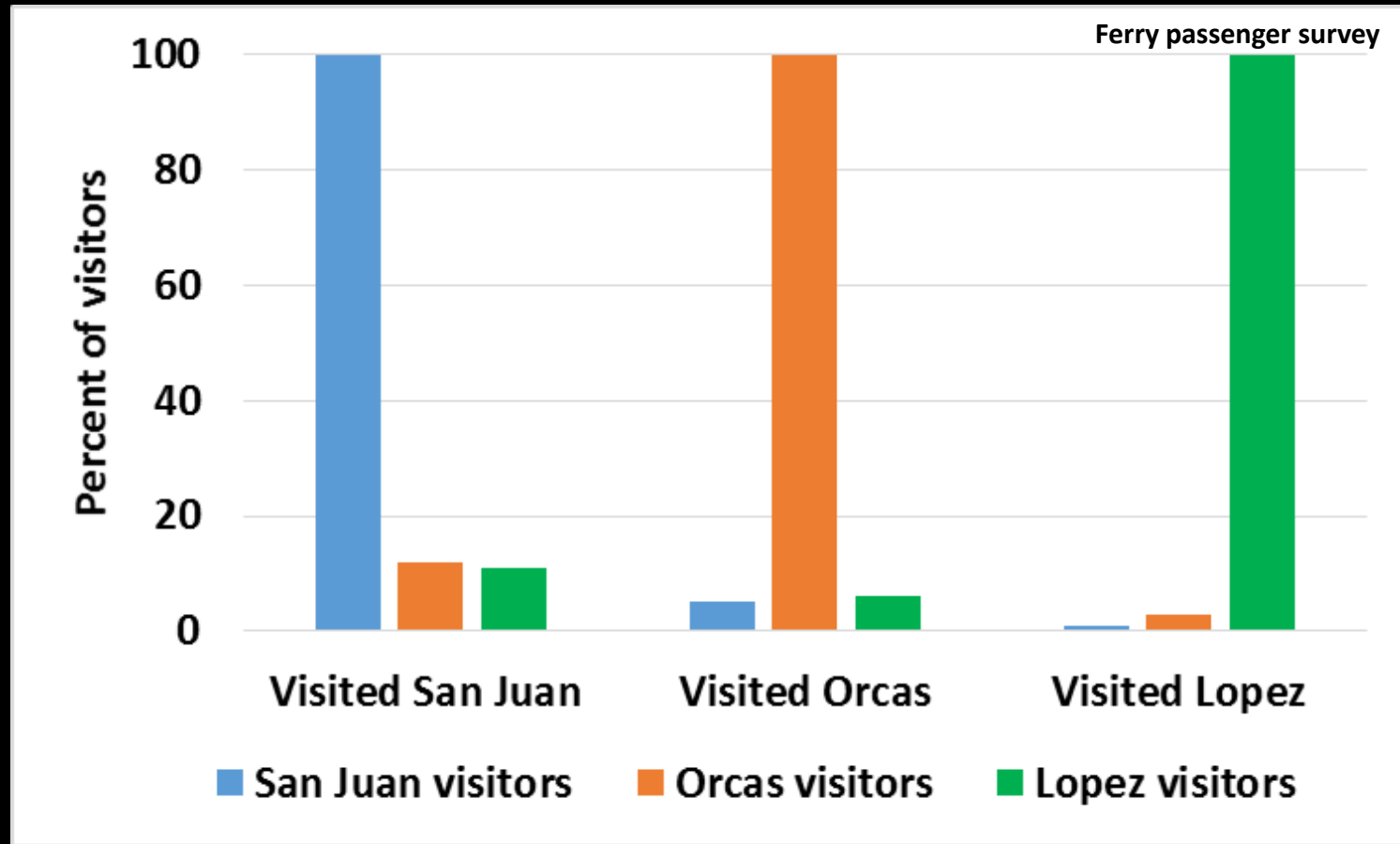
Which islands do SJI visitors go to? *From onsite survey*



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

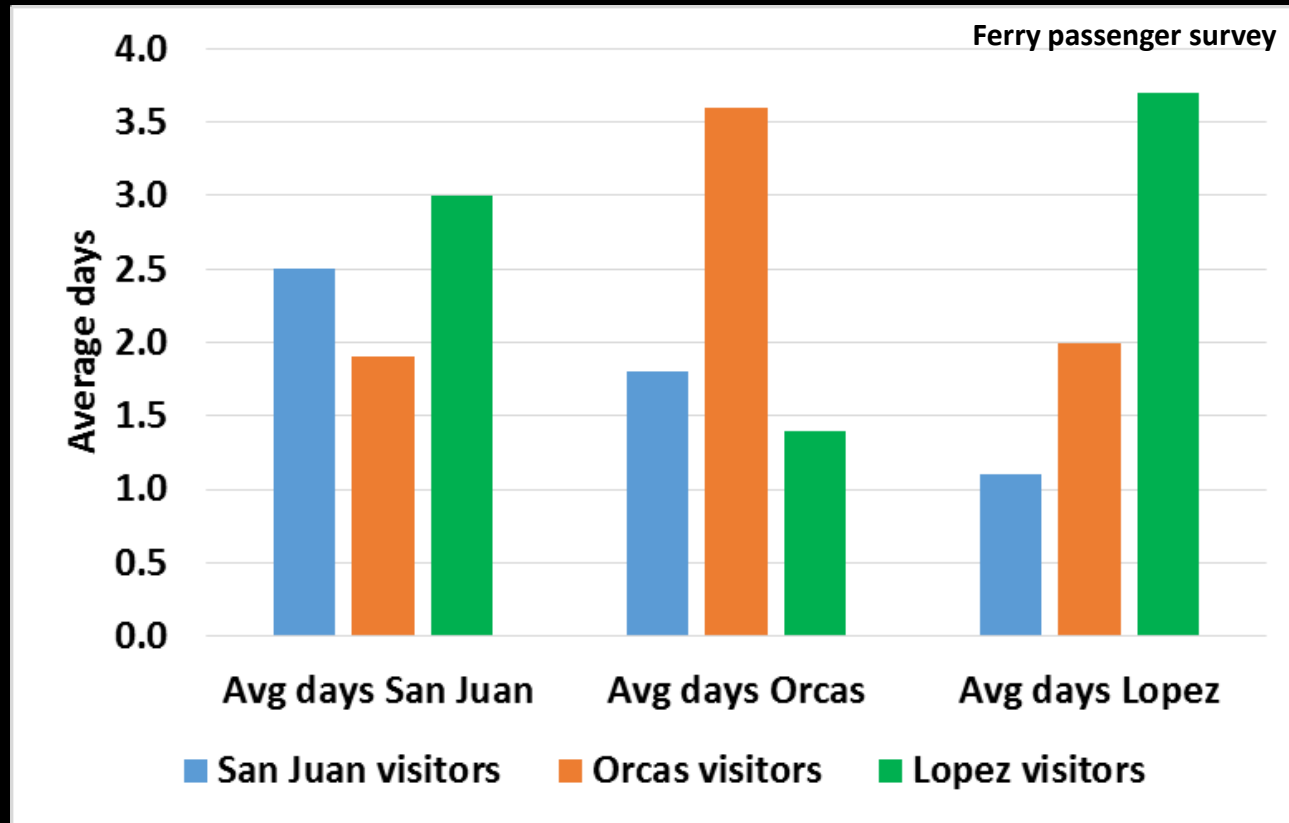
Who visits which island?

From ferry survey



Less multi-island travel than among onsite visitors (5-20%)
San Juan-surveyed visitors most likely to visit other islands
Lopez-surveyed visitors most likely to visit only one island

Average number of days per island (among those visiting that island)



San Juan visitors stay fewer days

Of those who visit multiple islands, many stay more than one day

A scenic sunset over a body of water, likely a fjord or bay. The sky is filled with soft, colorful clouds in shades of orange, pink, and purple. The sun is low on the horizon, casting a warm glow across the water. In the foreground, two people are kayaking on the water. In the middle ground, there are several small, tree-covered islands. In the background, larger landmasses are visible under the twilight sky.

Days on other islands – all visitors

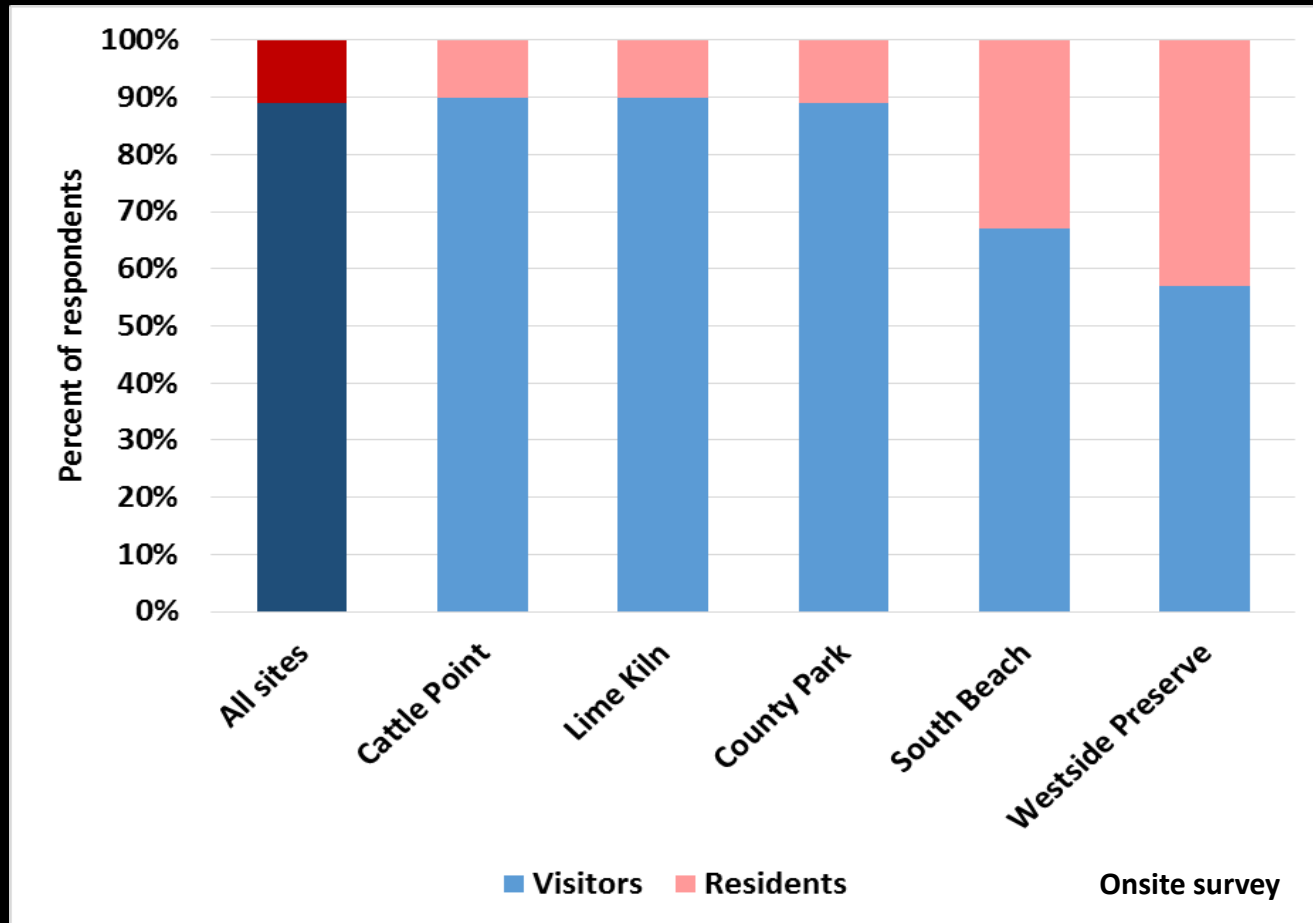
Pearl (14)
Henry (7)
Small private island (7)
Stuart (4)
James (3)
Sucia (3)
Jones (3)
Vancouver Island (3)
Shaw
Fidalgo
Gulf Islands
Whidbey

5% spend days on other islands
Of those: average 2.7 days

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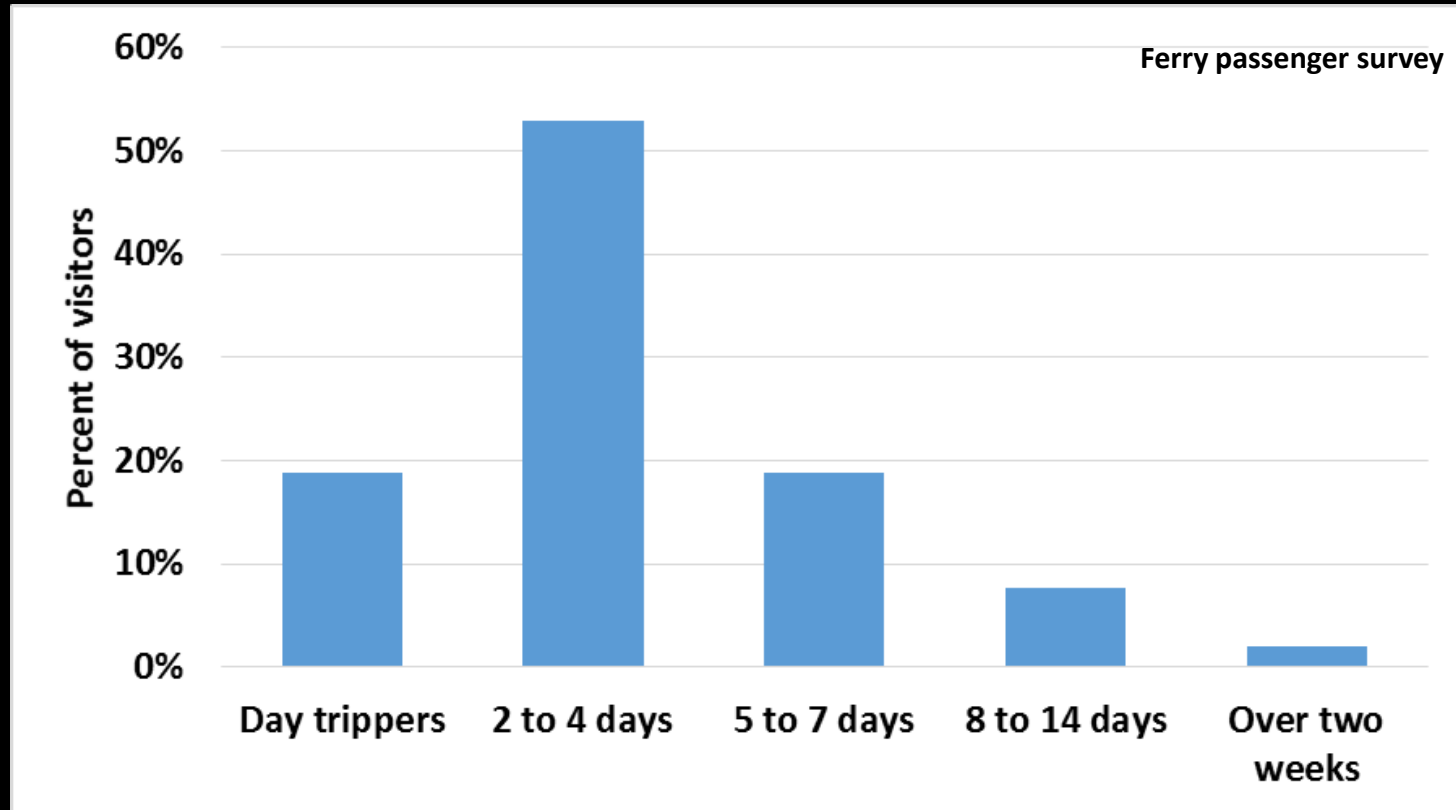
San Juan Island

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



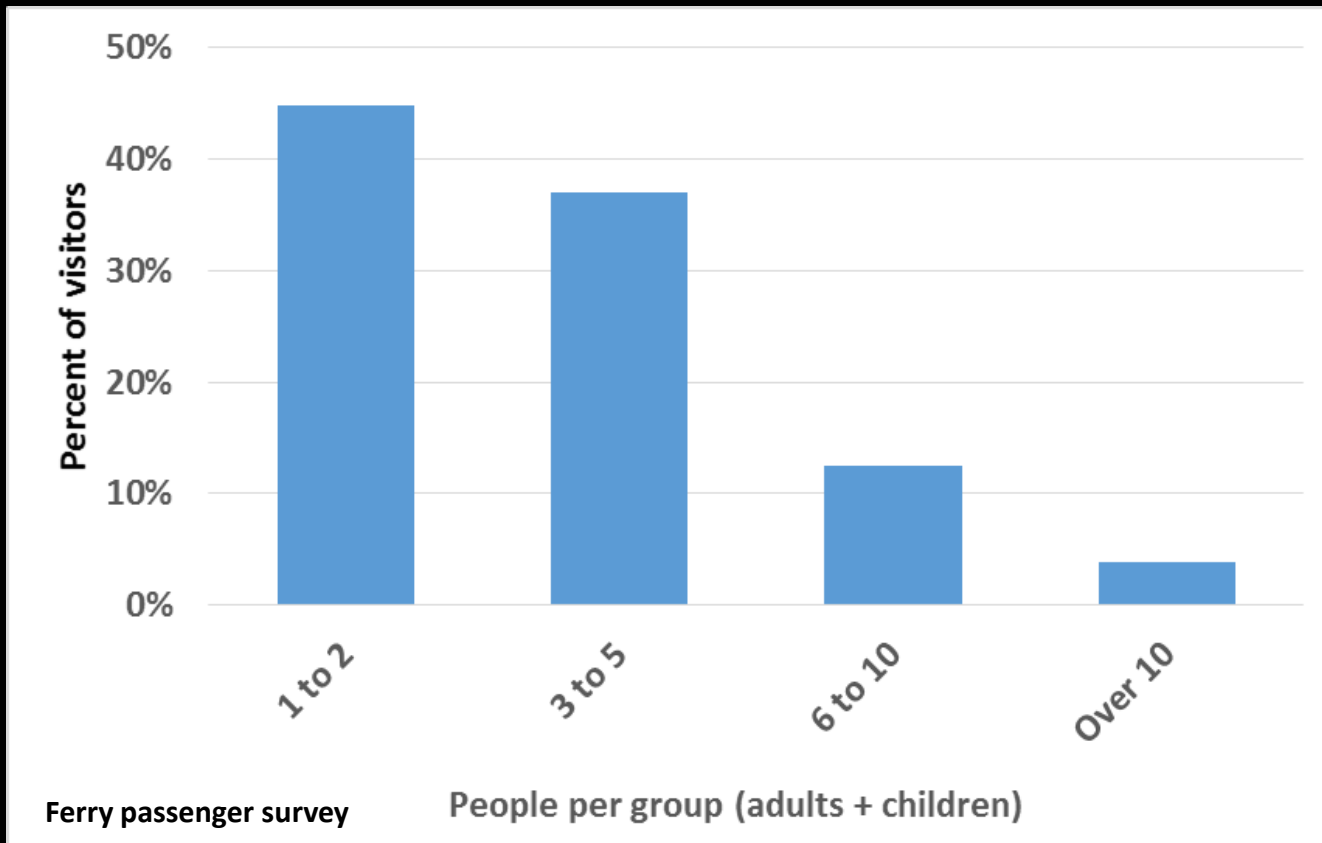
Much more day use than Orcas & Lopez

Median 3.0 days

Majority stay less than a long weekend

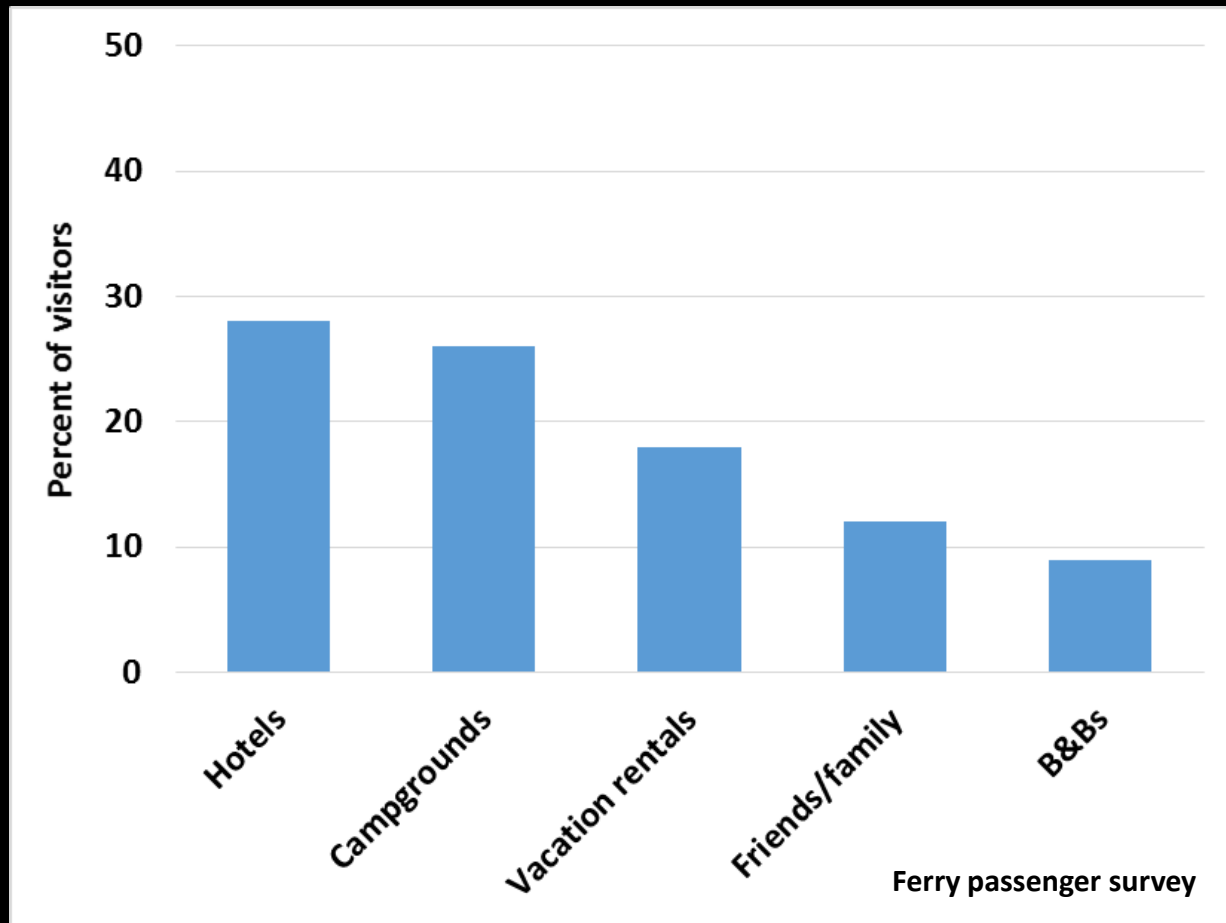
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Visitor group size



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

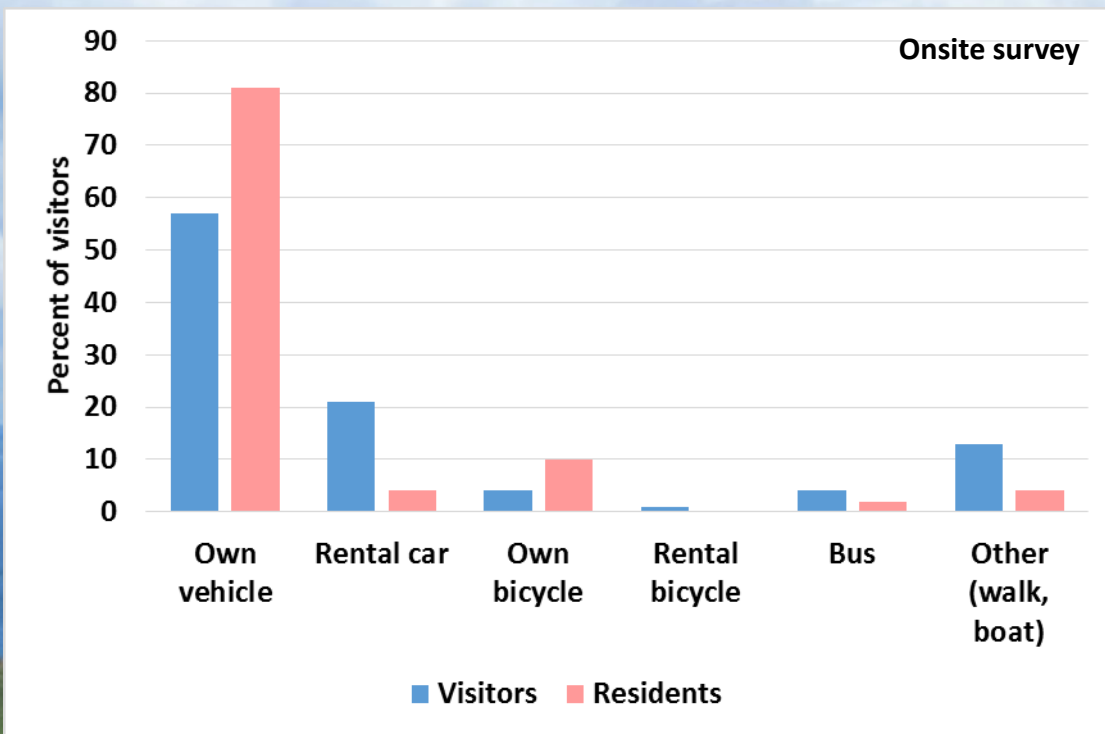
Visitors' accommodation



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

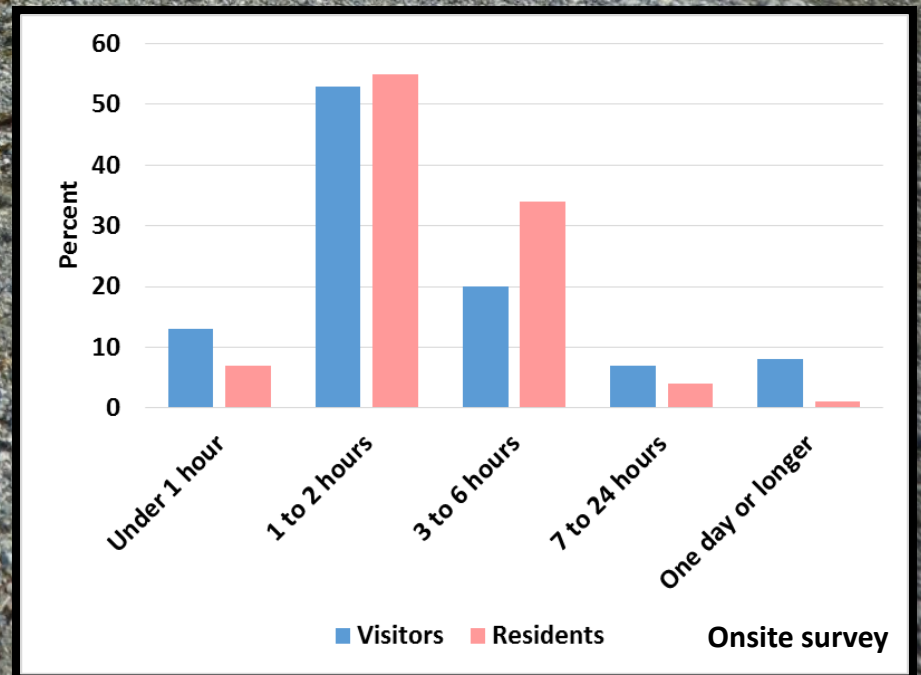
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Travel to sites – Visitors and residents

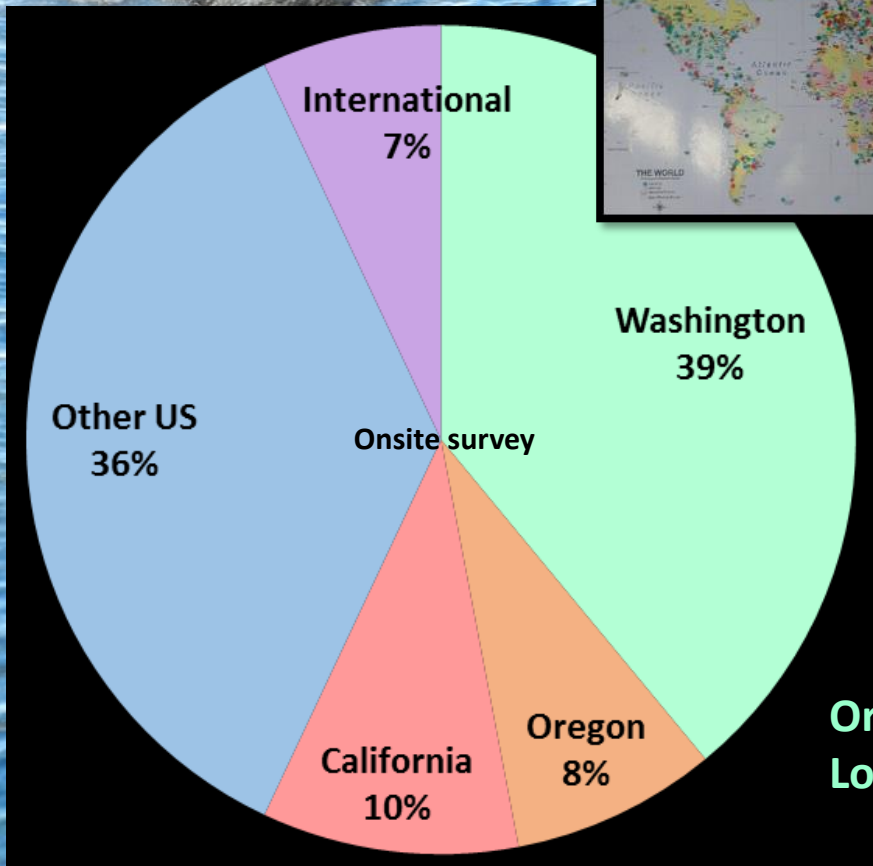


Most drive vehicles – their own or rentals
Residents use bikes more often than other islands

Length of site visit Visitors and residents



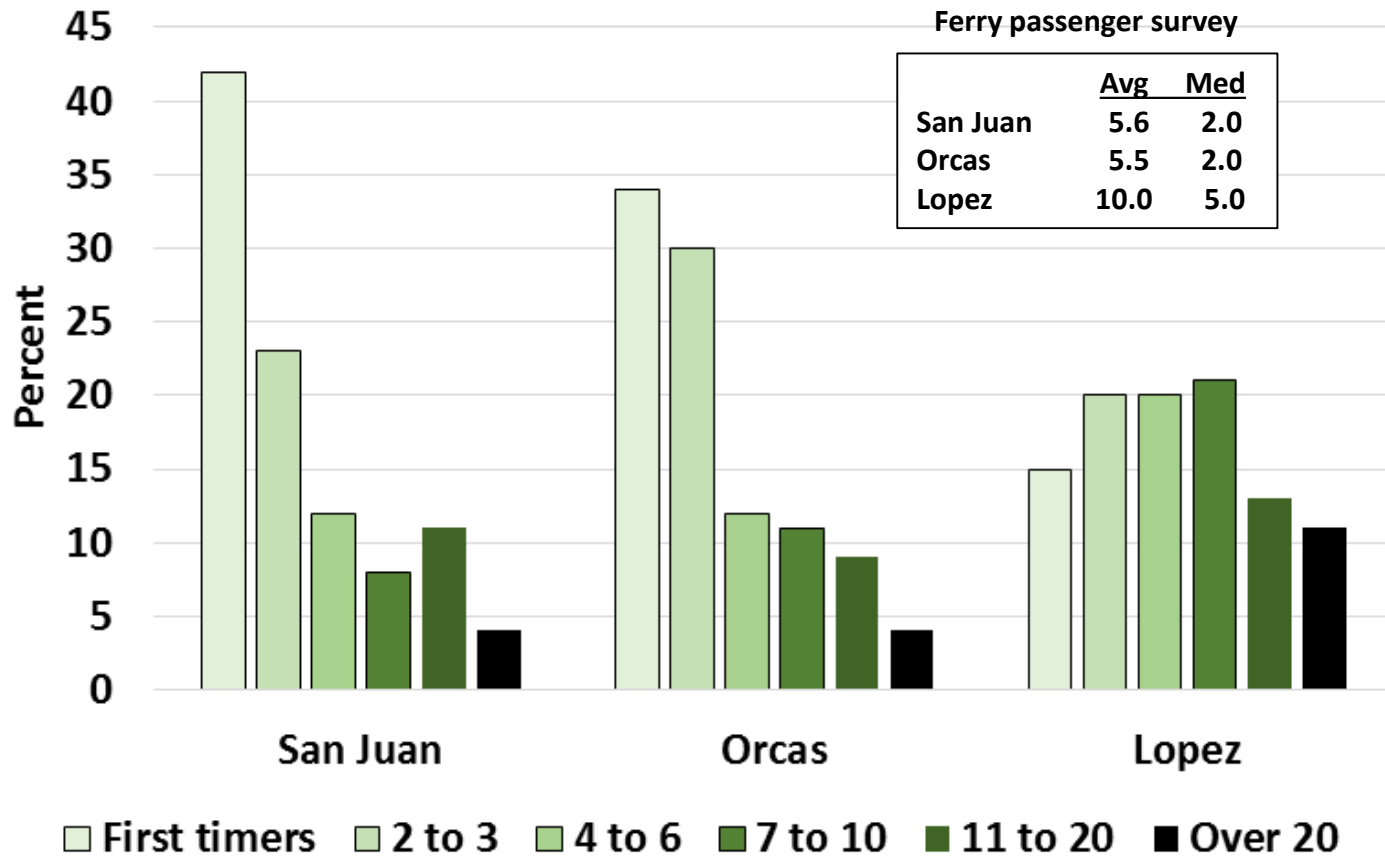
San Juan Island visitors – Where are they from?



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

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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

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).”

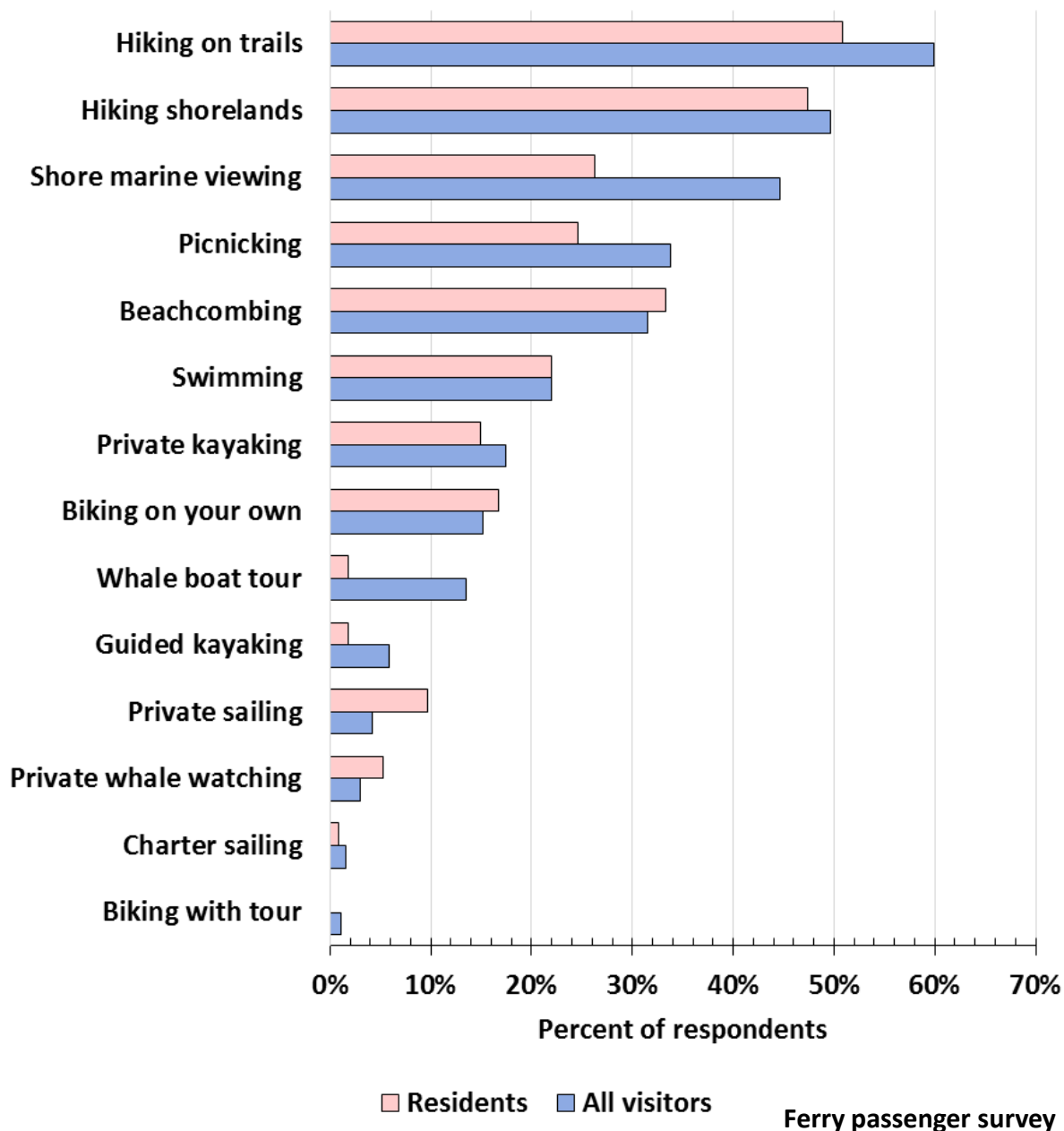
Hiking on trails

Etc.

14 activities listed on survey

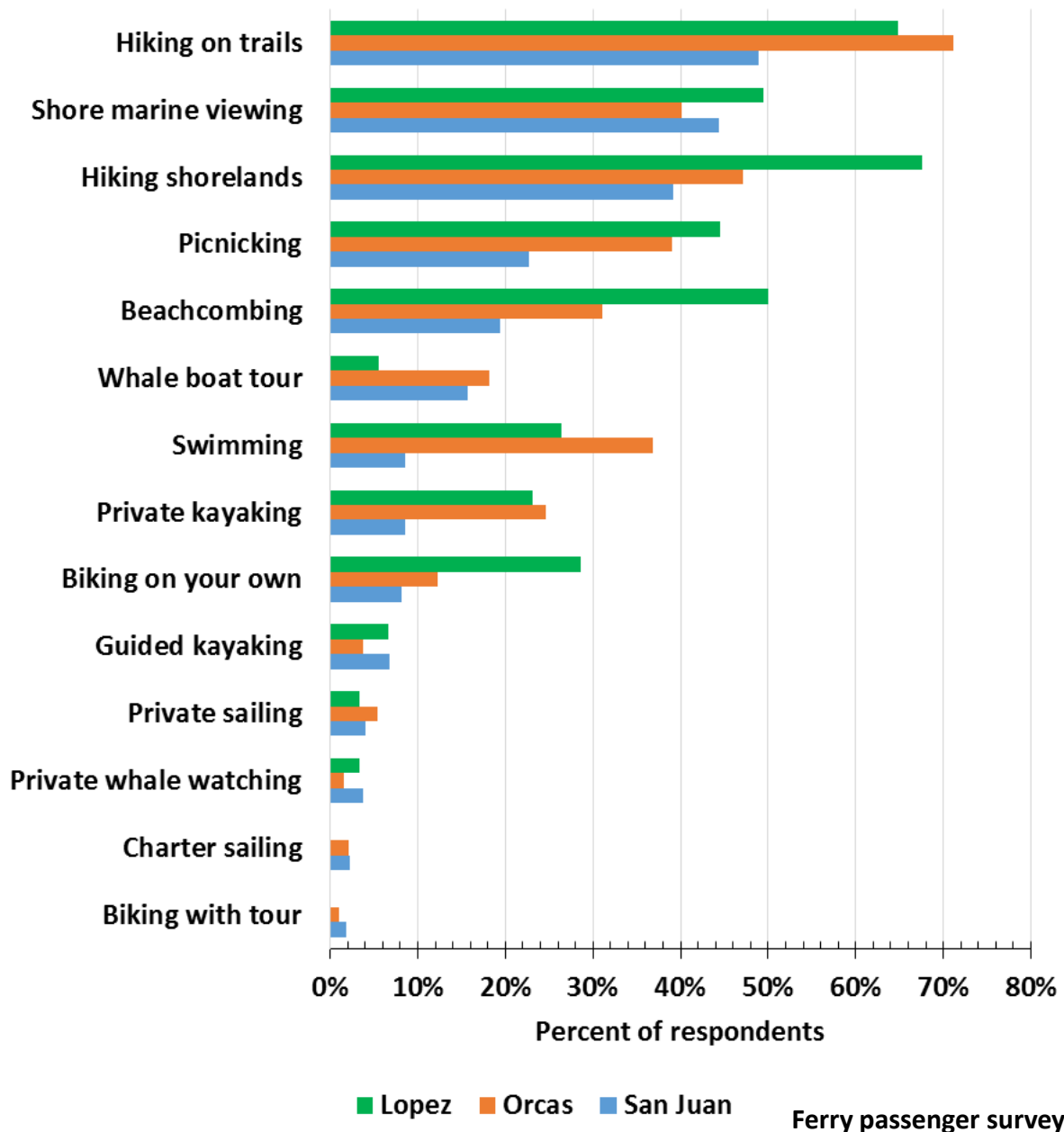
Percent of visitors and residents who checked each shown on graph

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

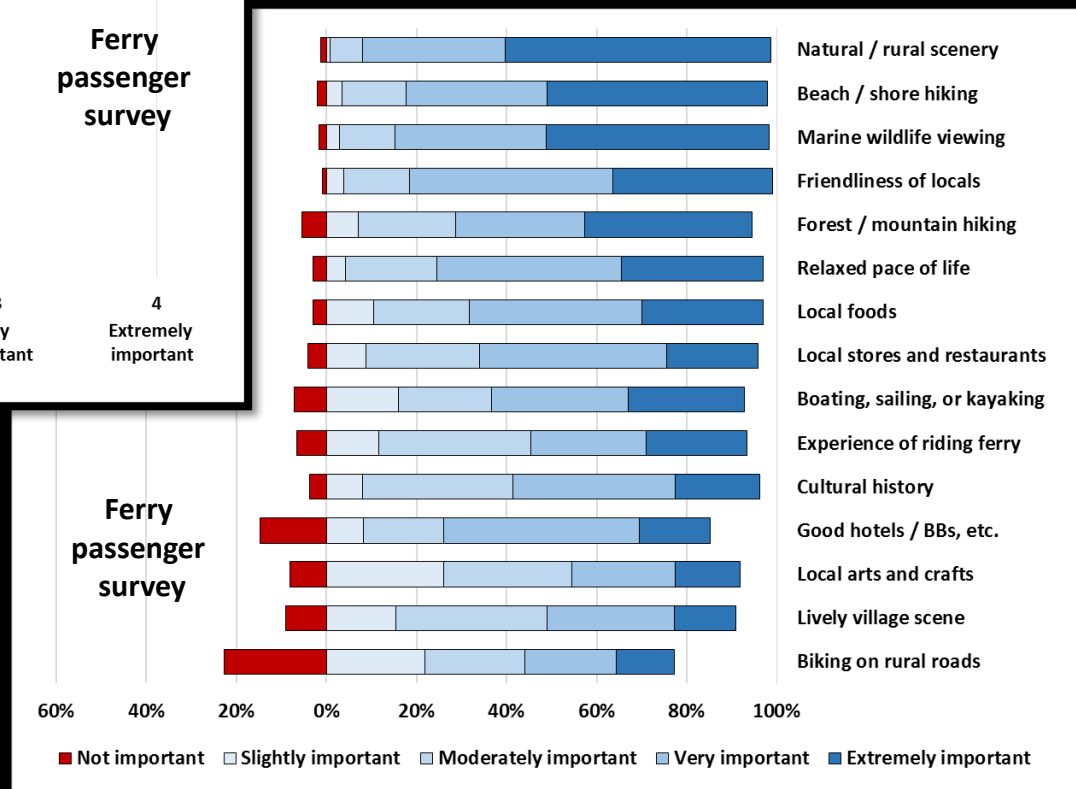
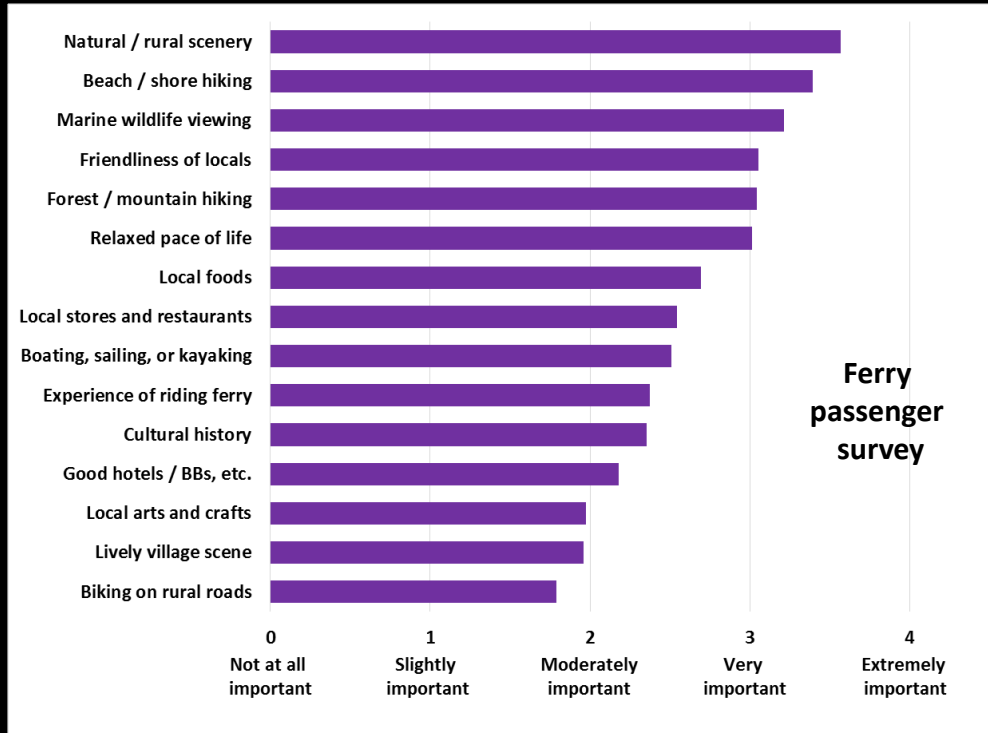
“People enjoy the San Juan Islands for many reasons. Please rate the following reasons for you.”

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

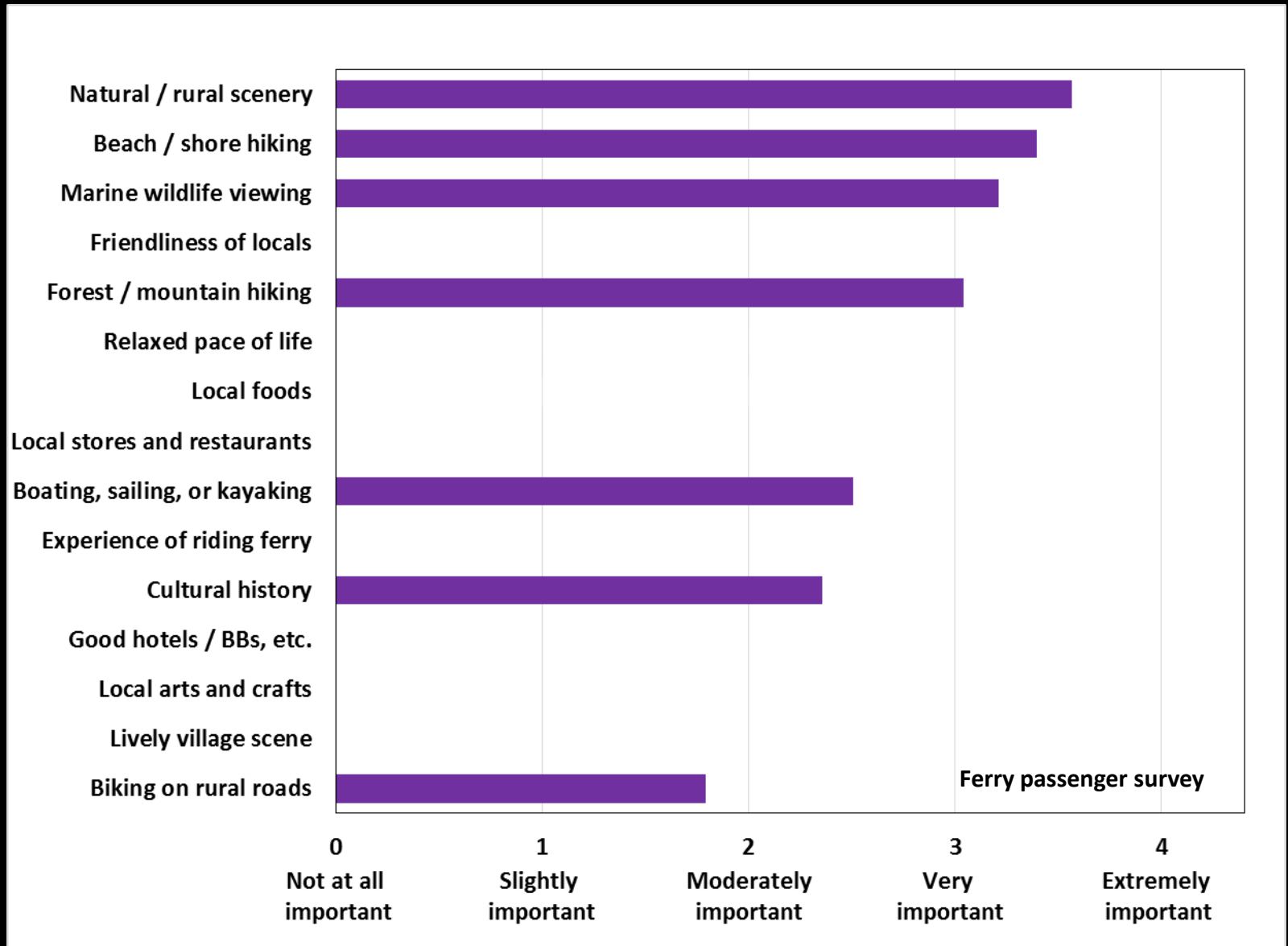
15 items on the survey

Average importance of 12 key items on following graph

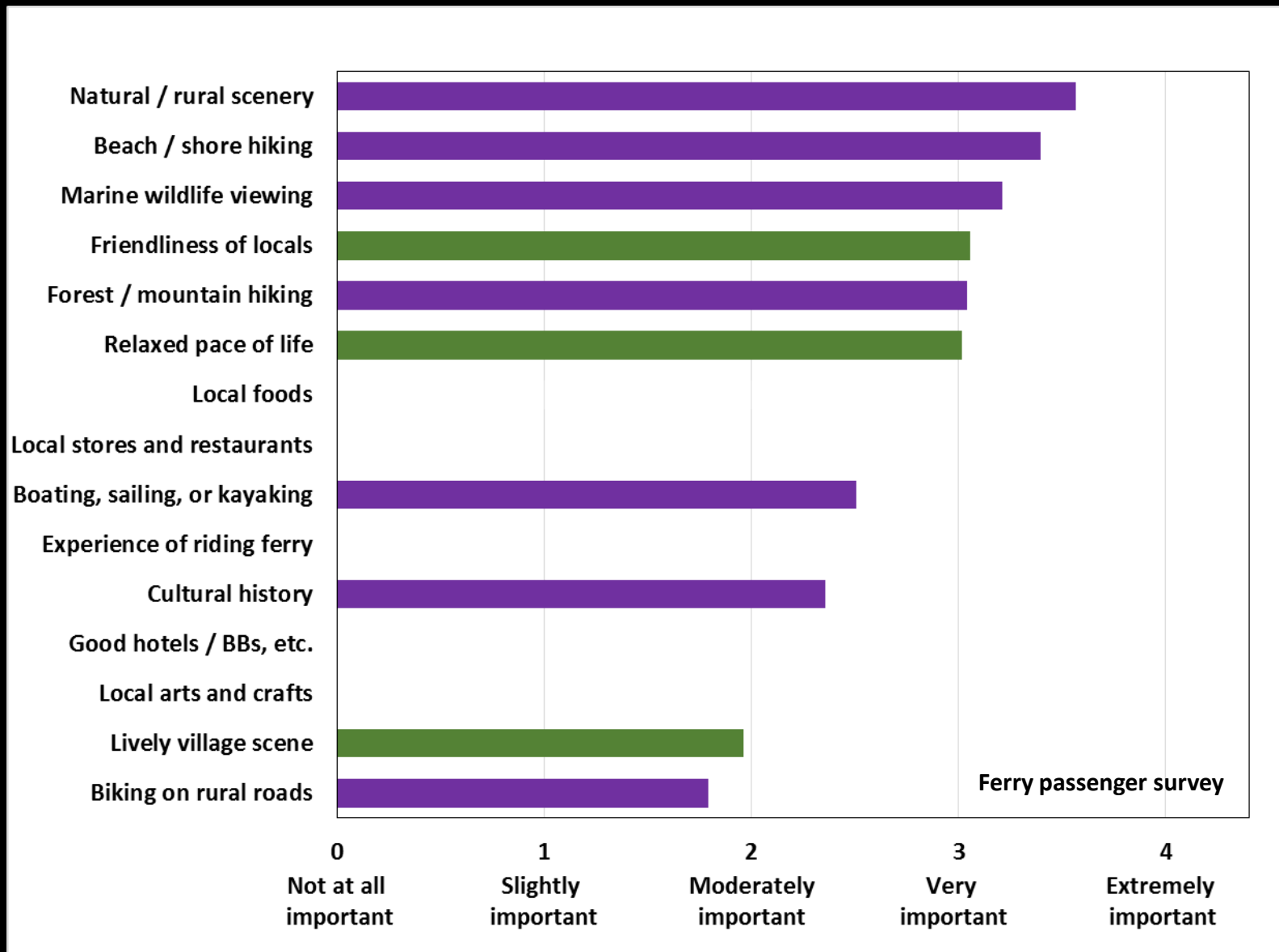
Experience importance: two ways to analyze



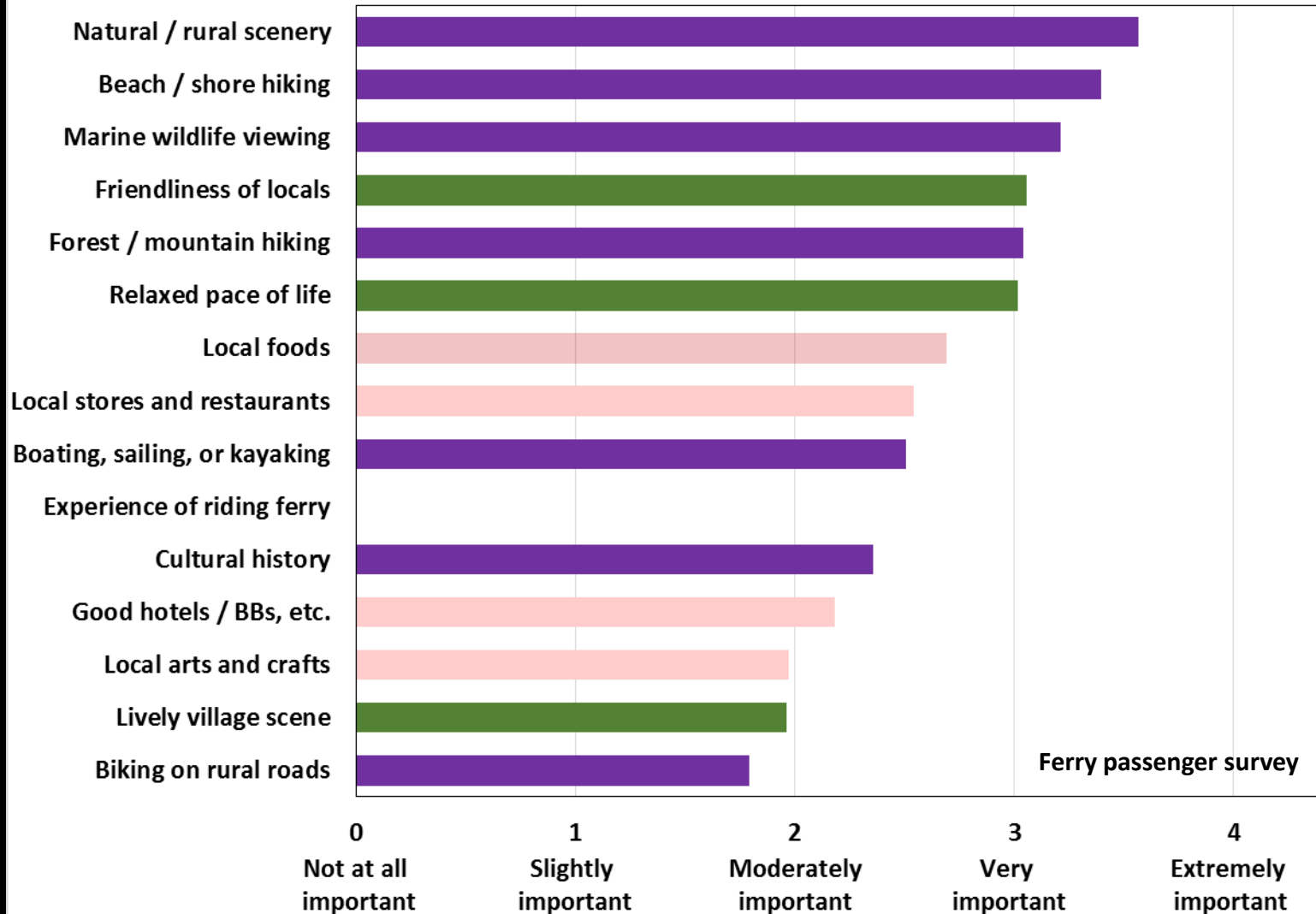
4 of 5 most important experiences rely on natural resources



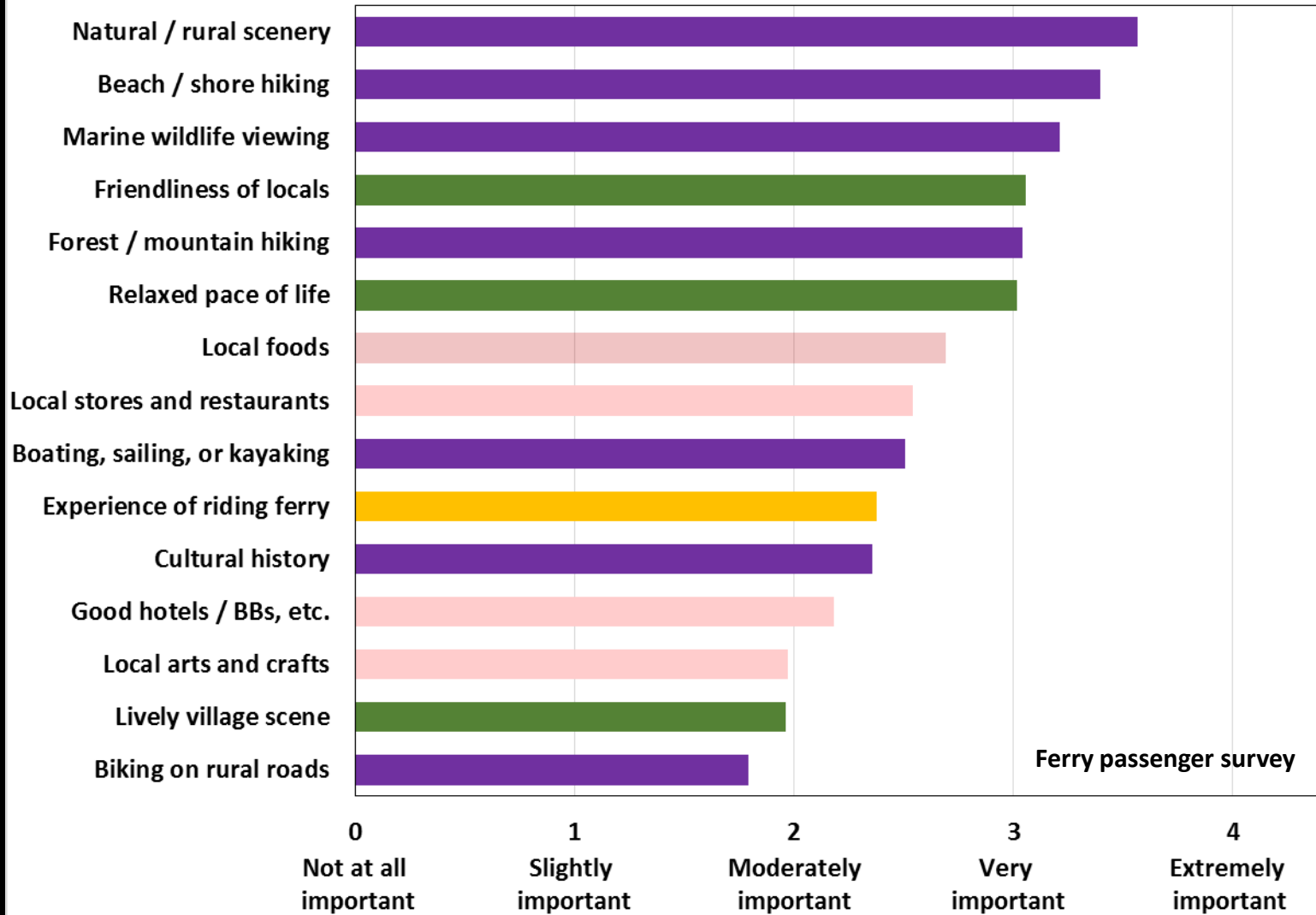
Social setting: Friendliness & relaxed pace > lively village scene

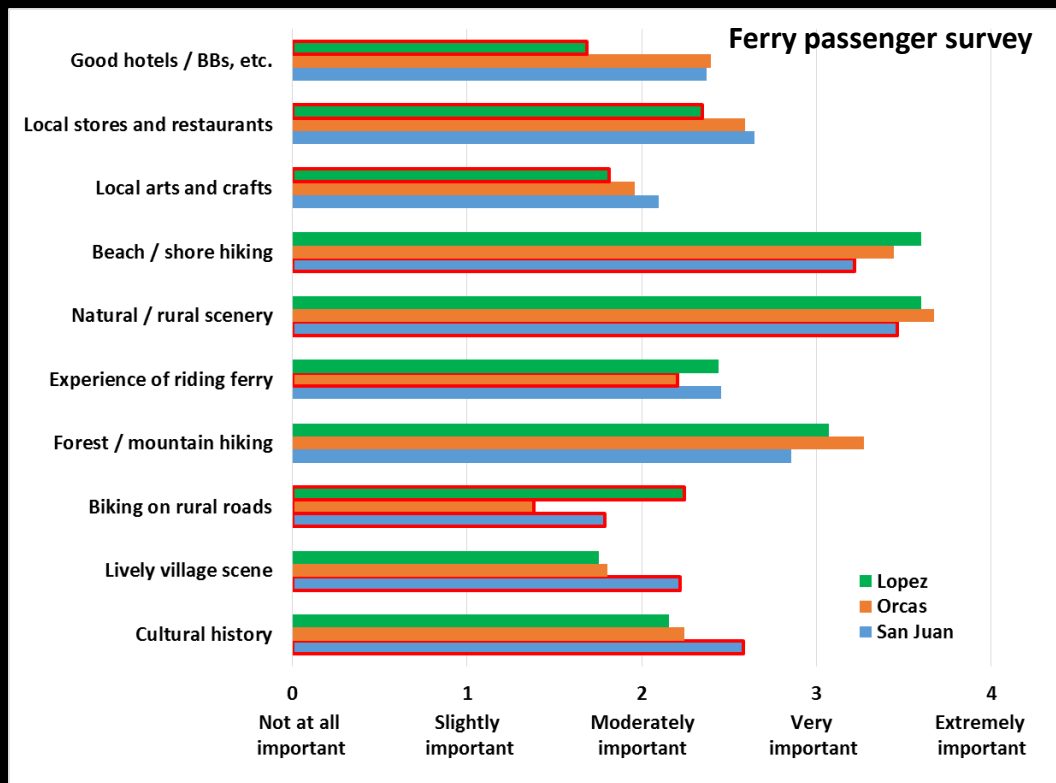


Tourism development is relatively less important



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**

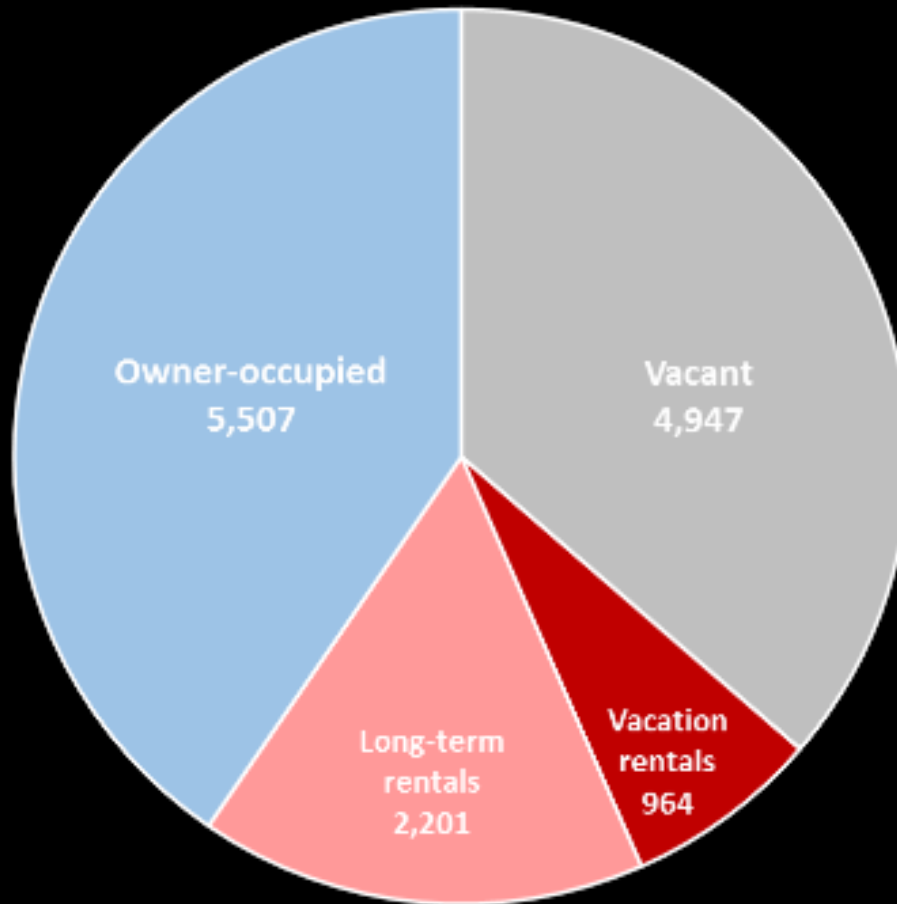


**Hotel
Inventory**

Overall housing stock

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

Four categories



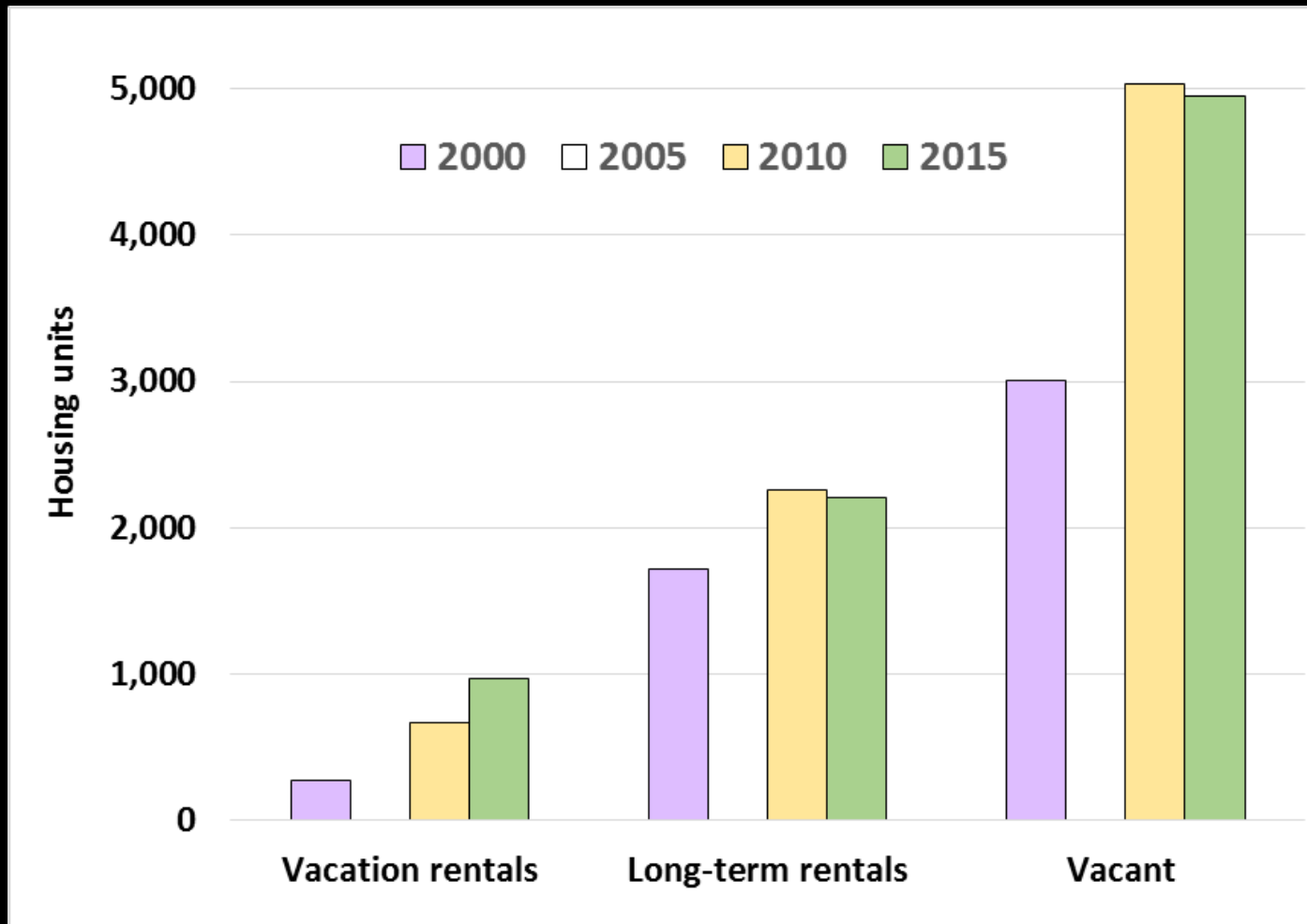
Source: SJI County DCD 2017 briefing on vacation rental code amendments (Erica Shook & Linda Kuller)

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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)

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Sampling



San Juan Islands · Homes

Become a hostHelpSign UpLog 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



RARE FIND

Search as I move the map

Stuart Island

Waldron Island

West Beach

Turt Mountain Preserve

Orcas

Shaw Island

Lakedale

Roche Harbor

Henry Island

Yacht Haven

San Juan Bay

Map data ©2018 Google

Terms of Use

Report a map error

\$581

\$112

\$176

\$165

\$256

\$102

\$220

\$94

\$229

\$288

\$161

\$173

\$175

\$203

\$426

Google

Language and currency



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Hotel Inventory


An aerial photograph of a waterfront resort. In the foreground, a large marina with multiple docks is filled with numerous white sailboats and motorboats. A long wooden pier extends from the shore into the water. Behind the marina, there are several buildings, including a large white structure with a red roof and a smaller blue building. The resort is surrounded by a dense forest of evergreen trees. The water is a deep blue, and the sky is clear.

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

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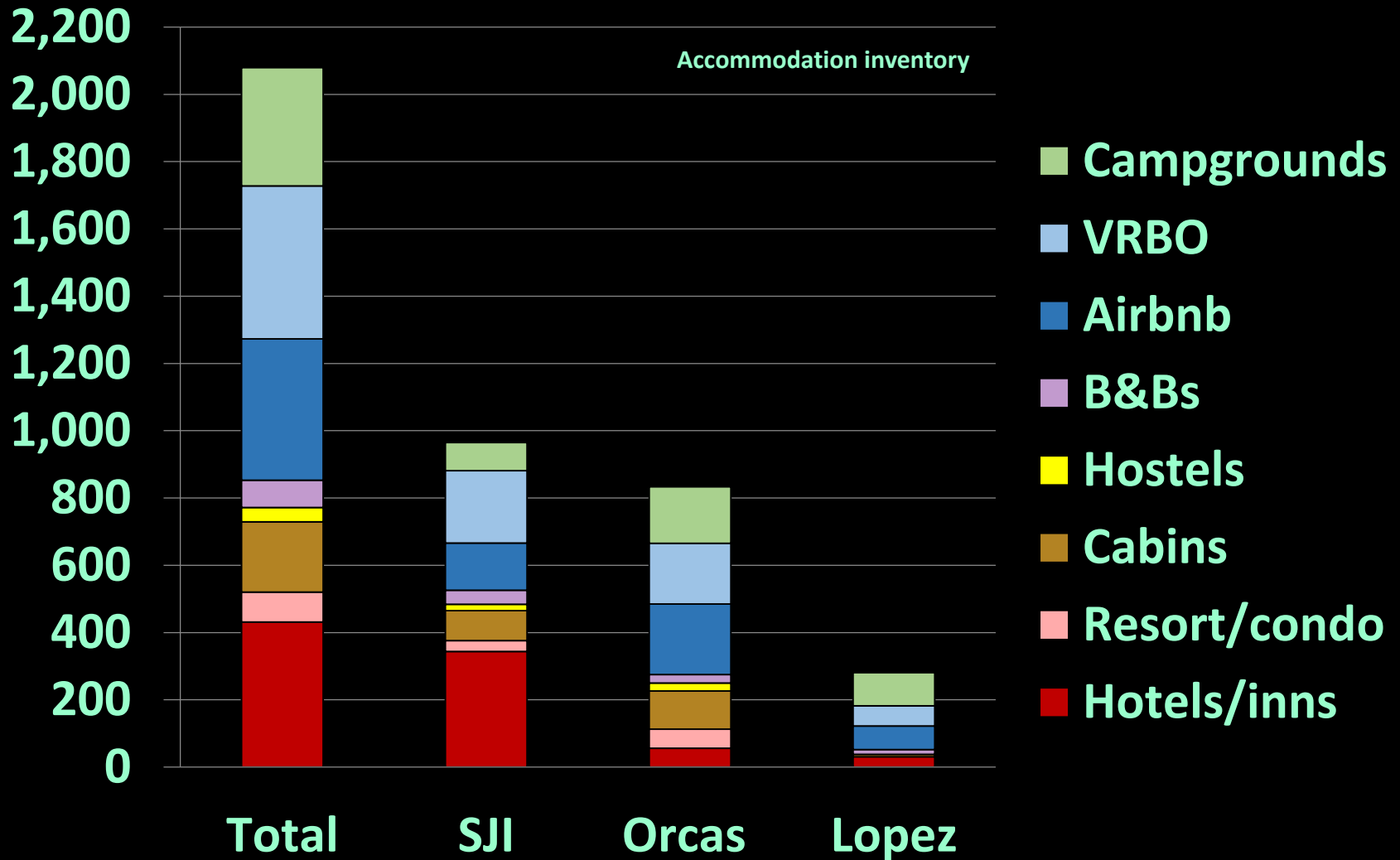


~ 50% of units
have kitchens

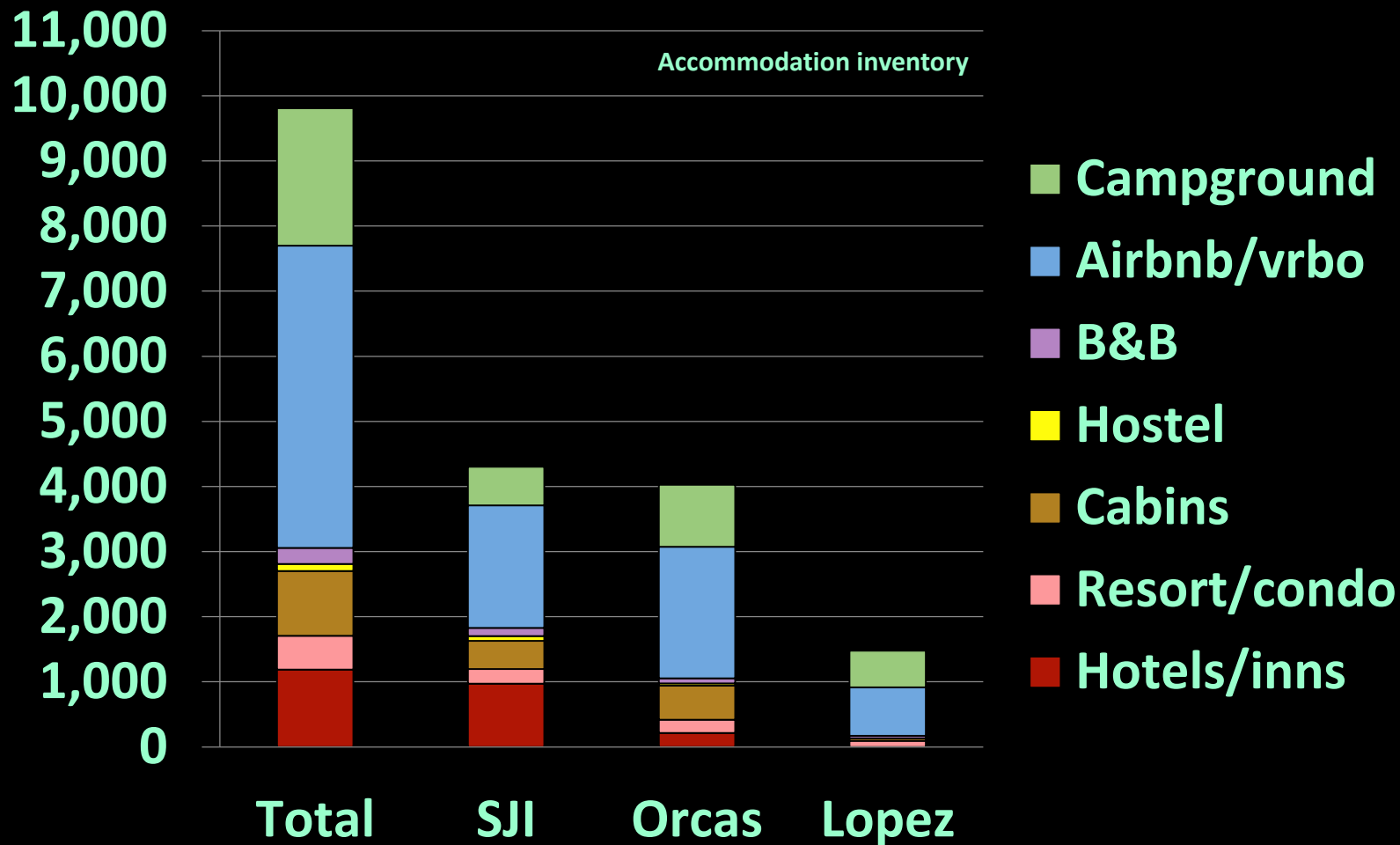
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Number of accommodation units

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

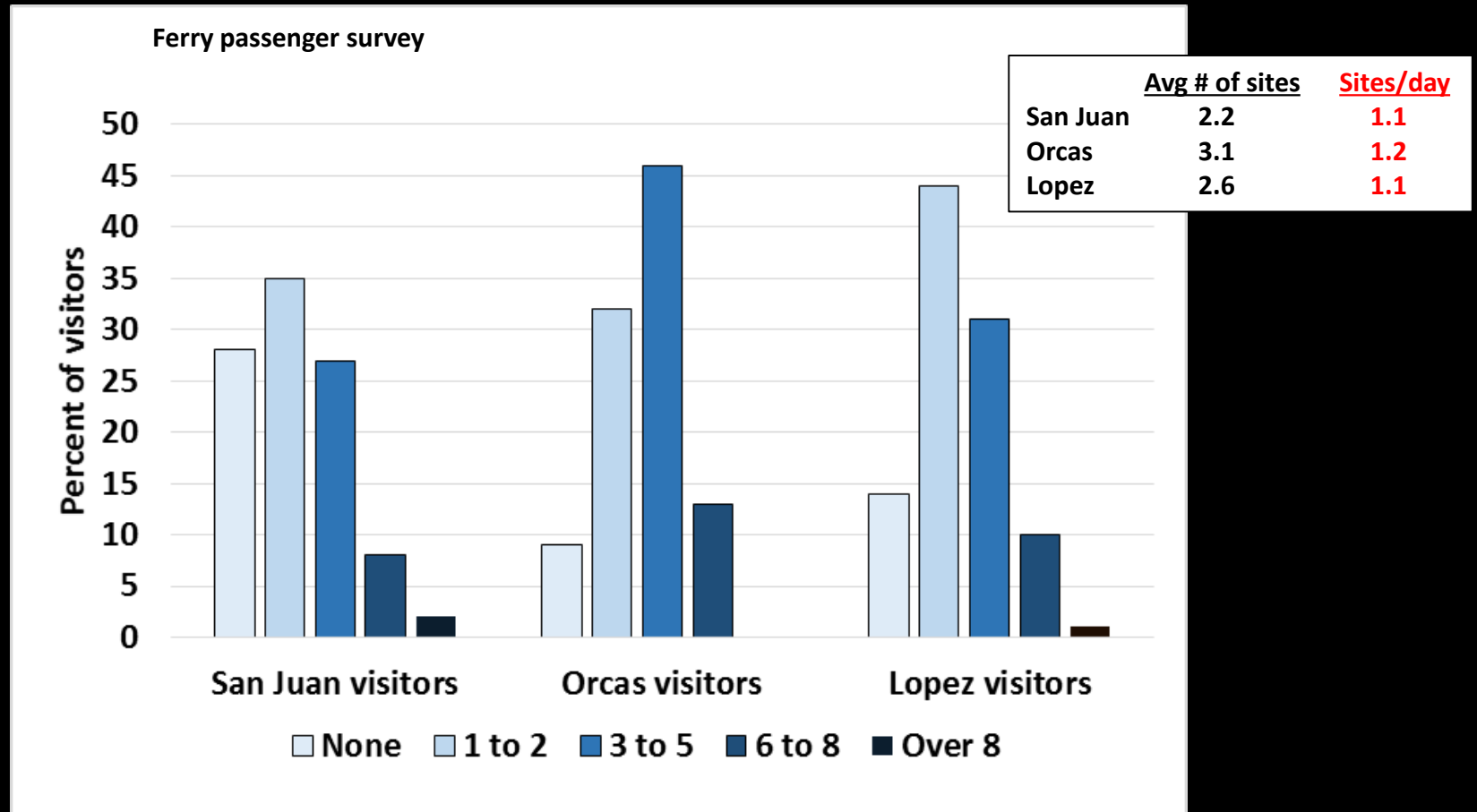
Where do they go?

Onsite and ferry surveys; some use stats



Number of recreation sites visited (total and per day)

For the island where they were surveyed



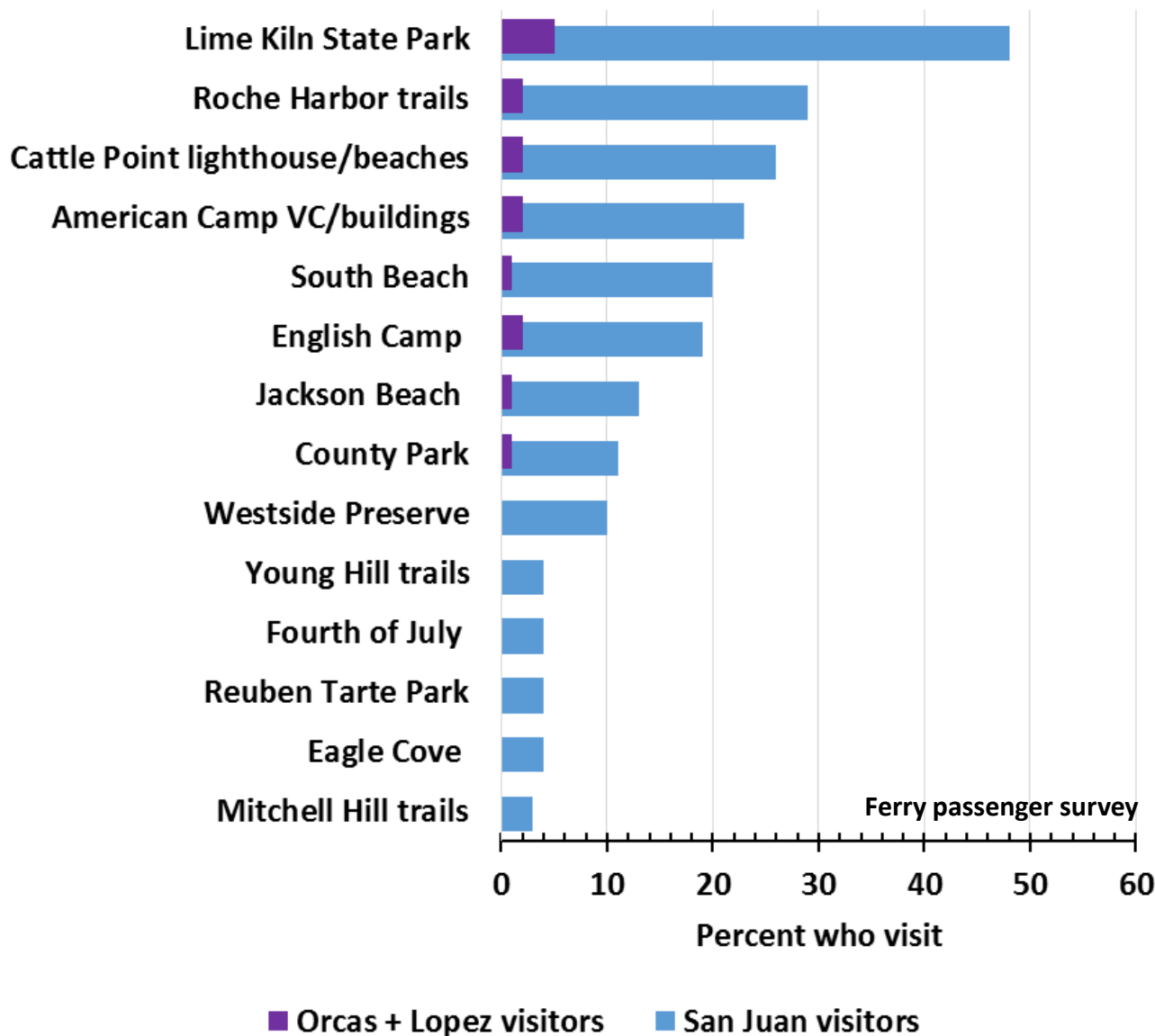
Majorities visit multiple sites

Orcas > Lopez > San Juan

More San Juan visitors don't visit any sites

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

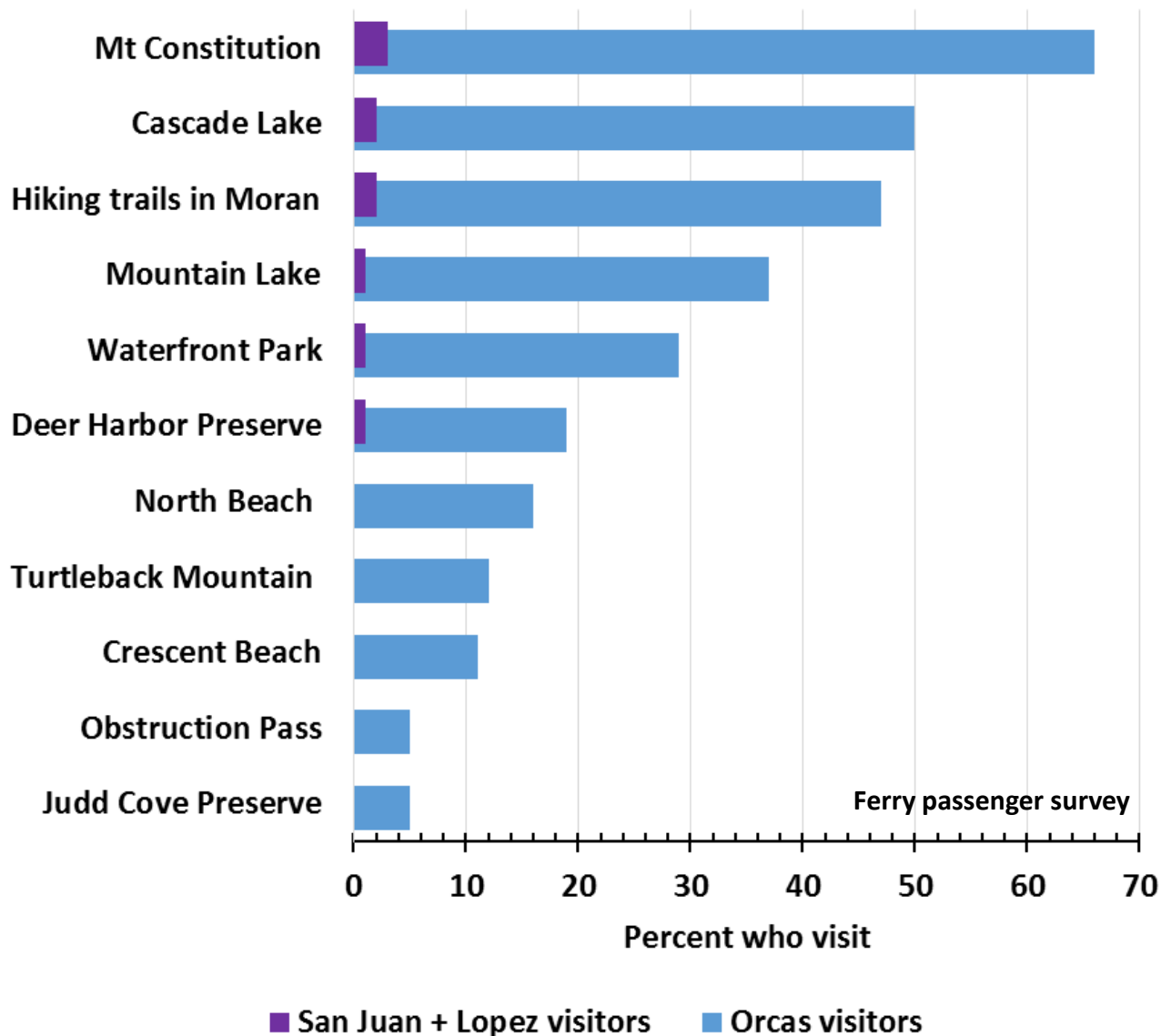
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Most visited outdoor recreation sites on San Juan Island

Others listed:

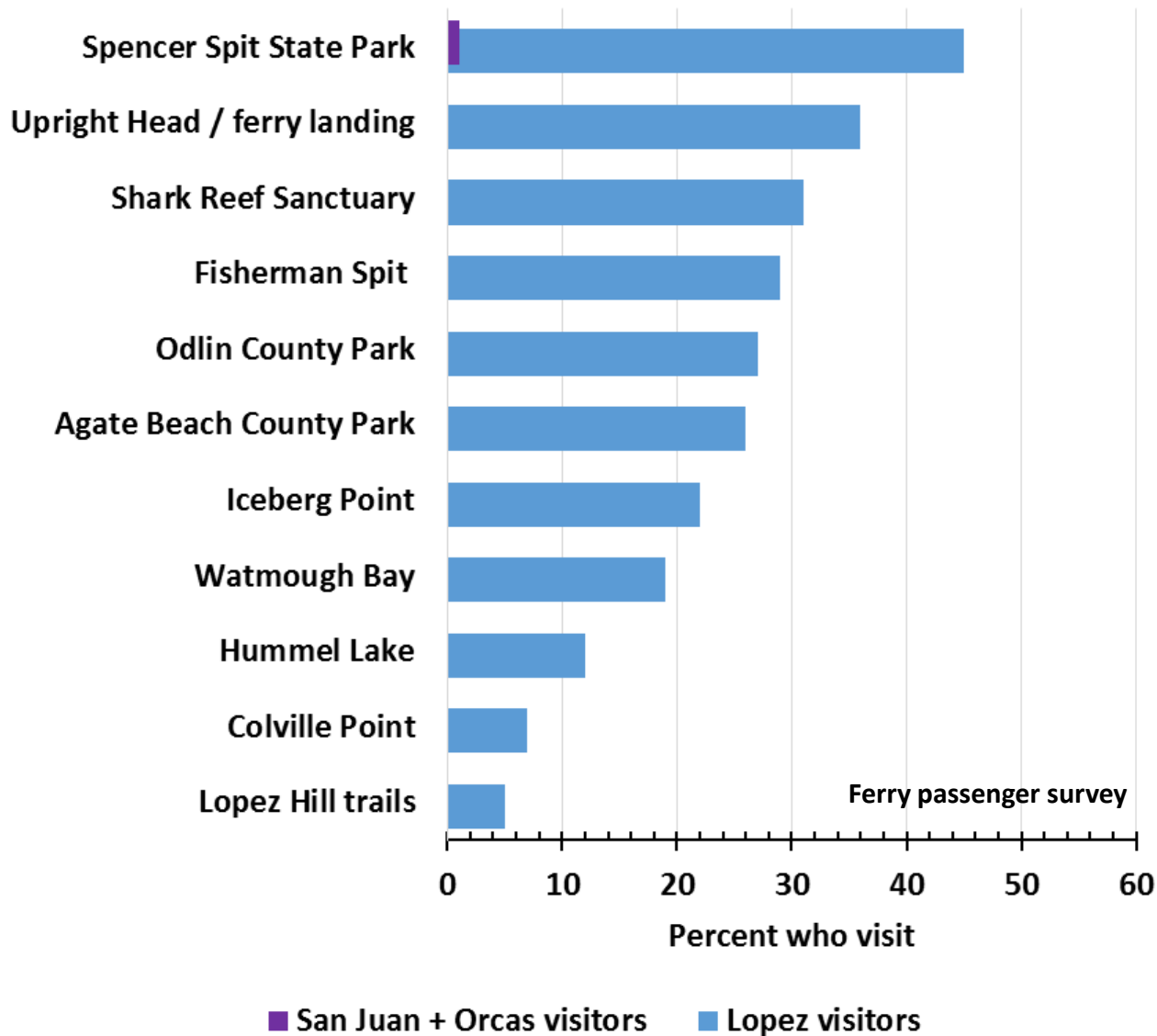
Friday Harbor
Shops/restaurants
Alpaca Farm
Lavender Farm
Deadman's Bay
Egg Lake
Cemetery
Whales



Most visited outdoor recreation sites on Orcas Island

Others listed:

Eastsound
Buck Bay
Skate park
Rosario
Kayaking
Whale watching



Most visited outdoor recreation sites on Lopez Island

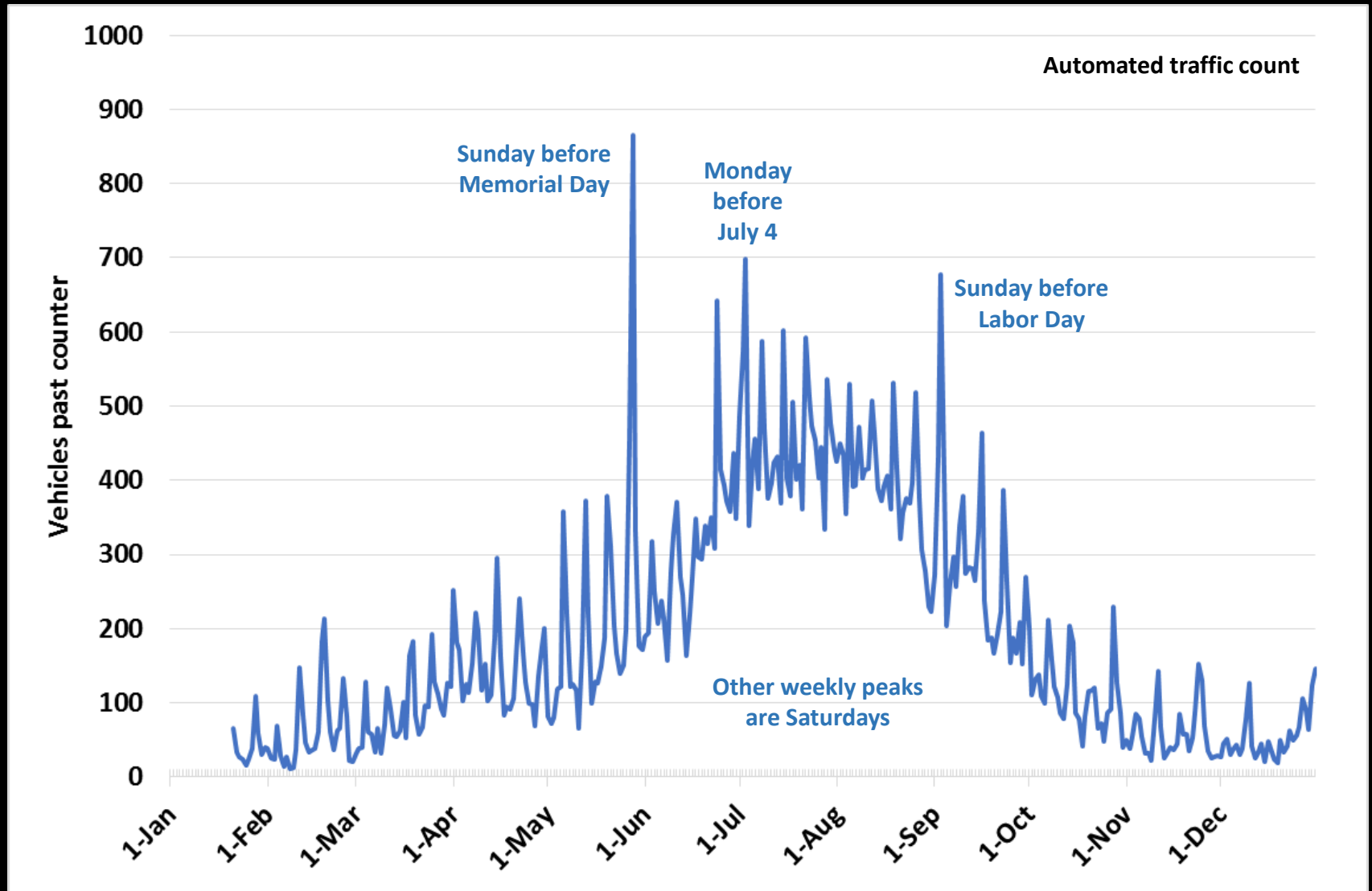
Others listed:

Lopez Village
Mackaye Harbor
Flat Head
Marina
Kayaking

Use levels at sites

*Traffic counters, campground
reservations, and onsite counts*

Lime Kiln traffic counts 2017

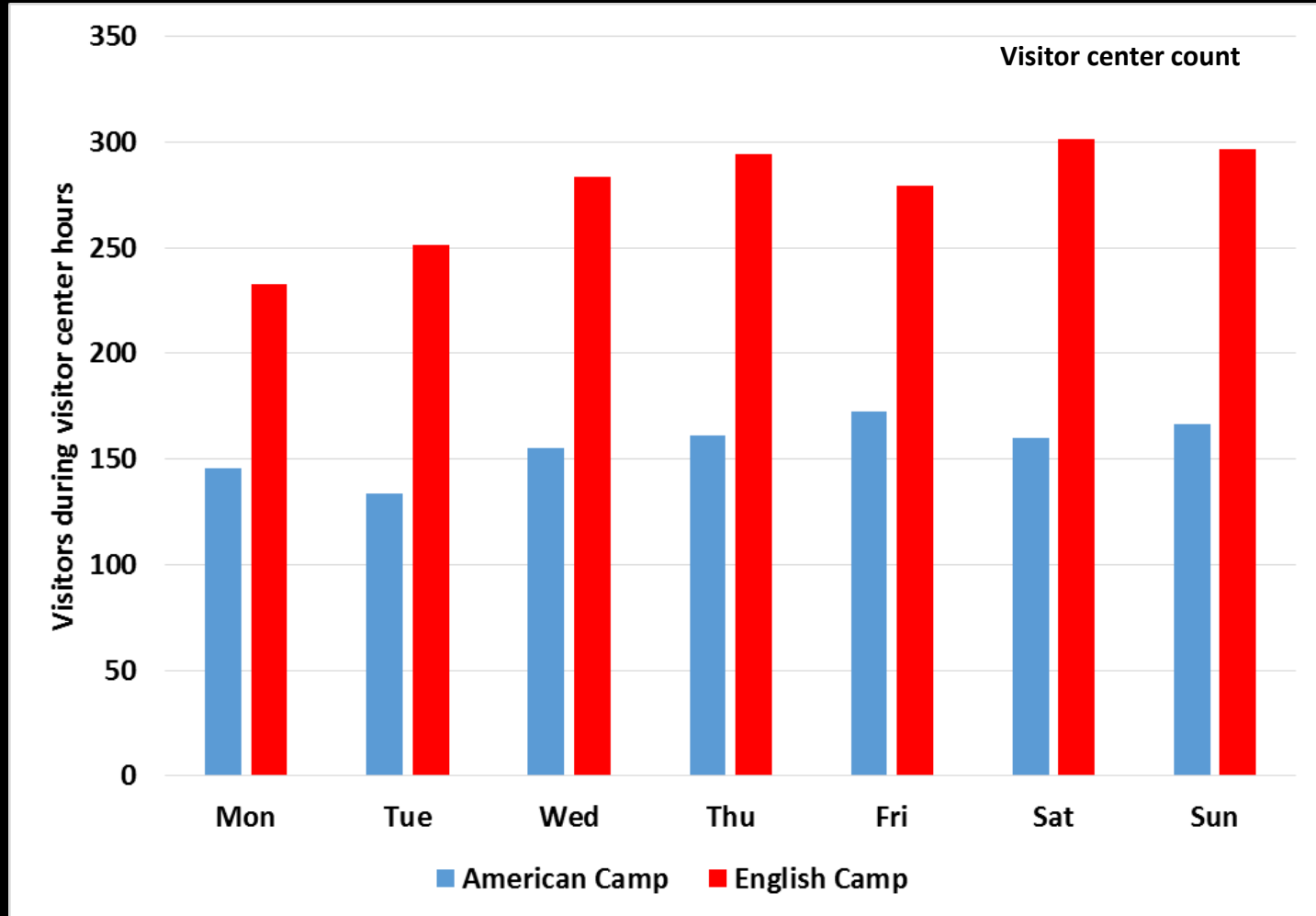


Same season, weekend, and holiday effects shown in WSF data

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American Camp and English Camp visitor center counts 2017

Day of the week variation



Bob Otis Lime Kiln observations

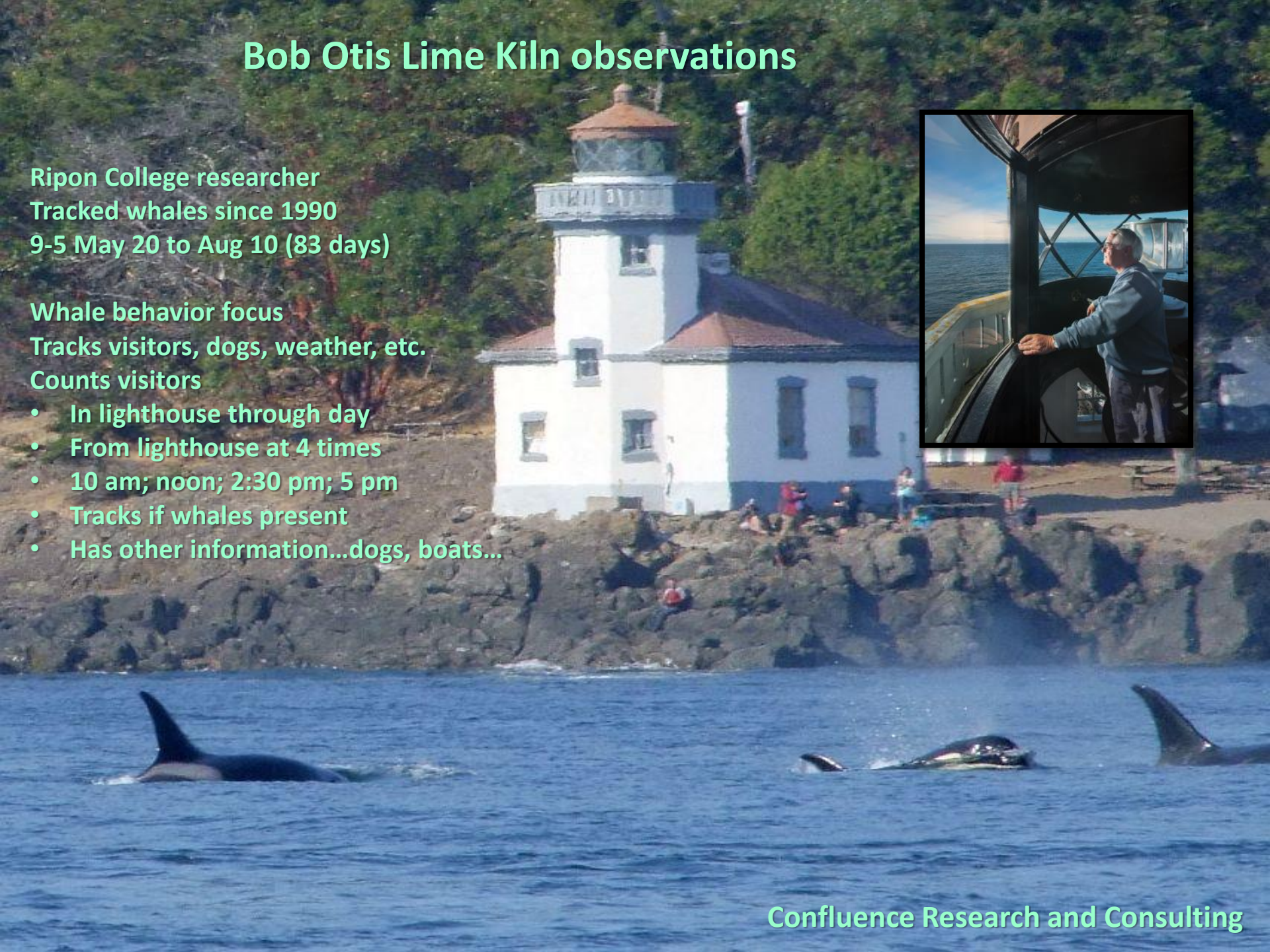
Ripon College researcher
Tracked whales since 1990
9-5 May 20 to Aug 10 (83 days)

Whale behavior focus

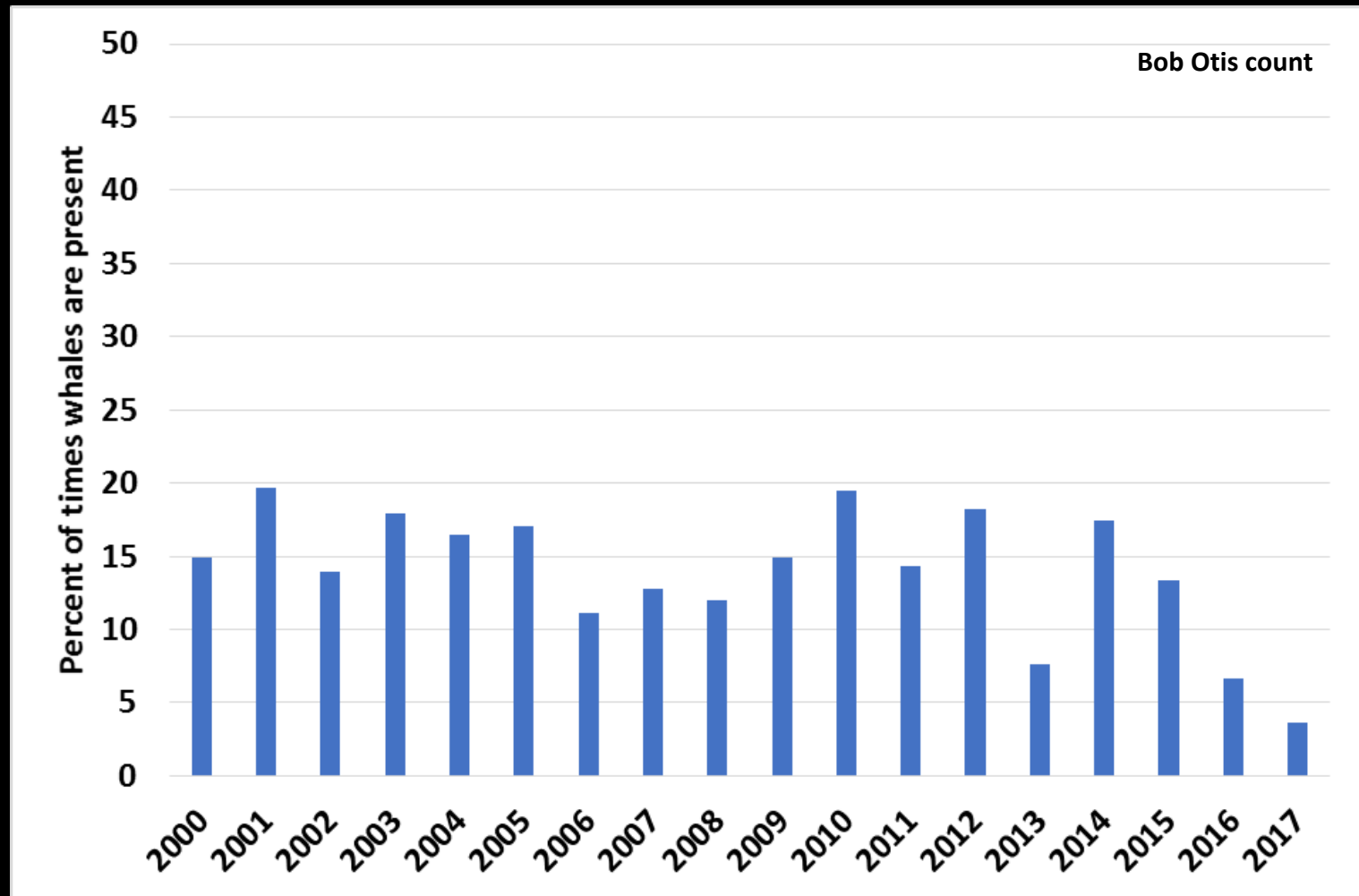
Tracks visitors, dogs, weather, etc.

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

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Best times for viewing at Lime Kiln

Percent of times with whales

10% at 10 am

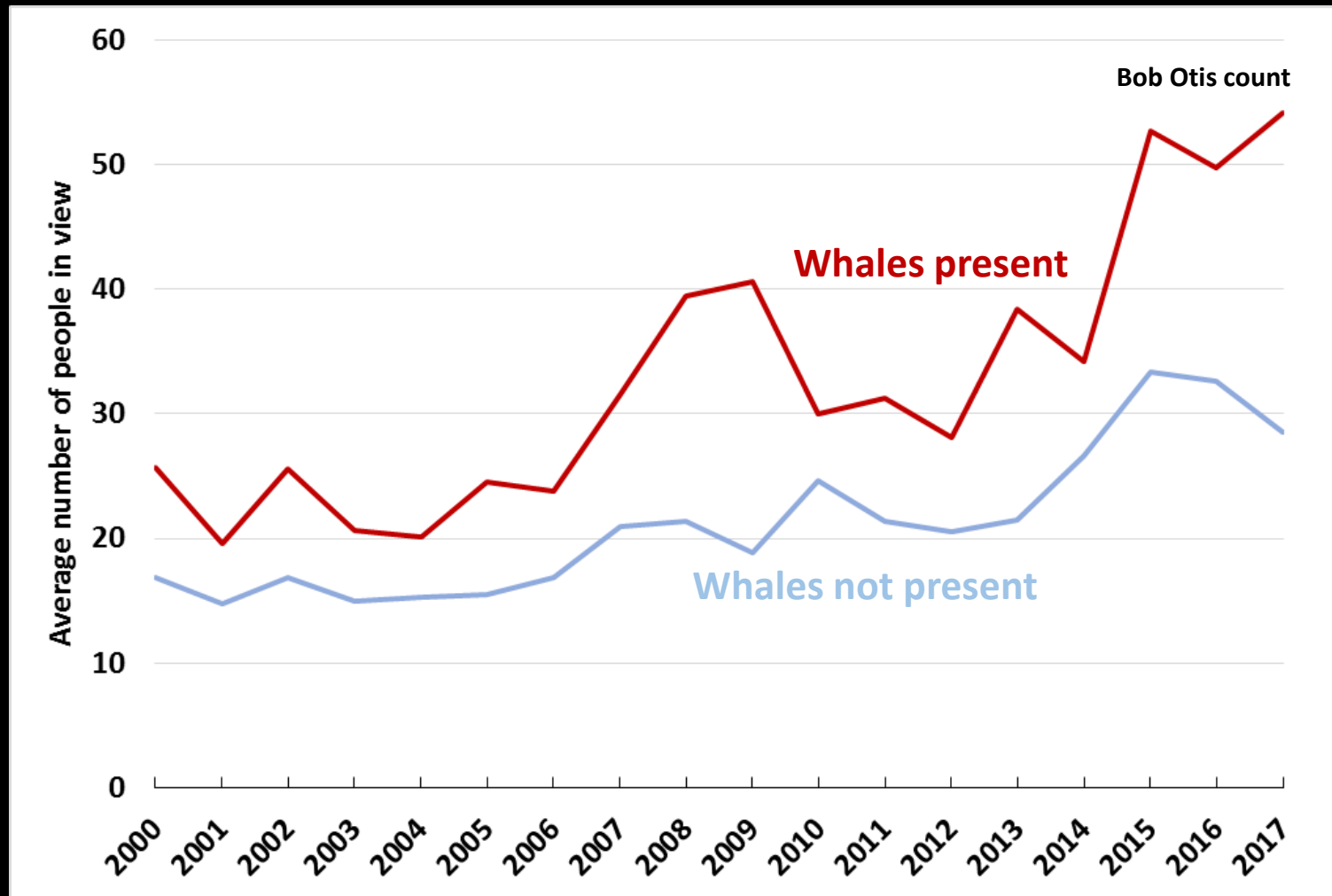
16% at noon

17% at 2:30 pm

14% at 5 pm

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Average number of people in view from Lighthouse



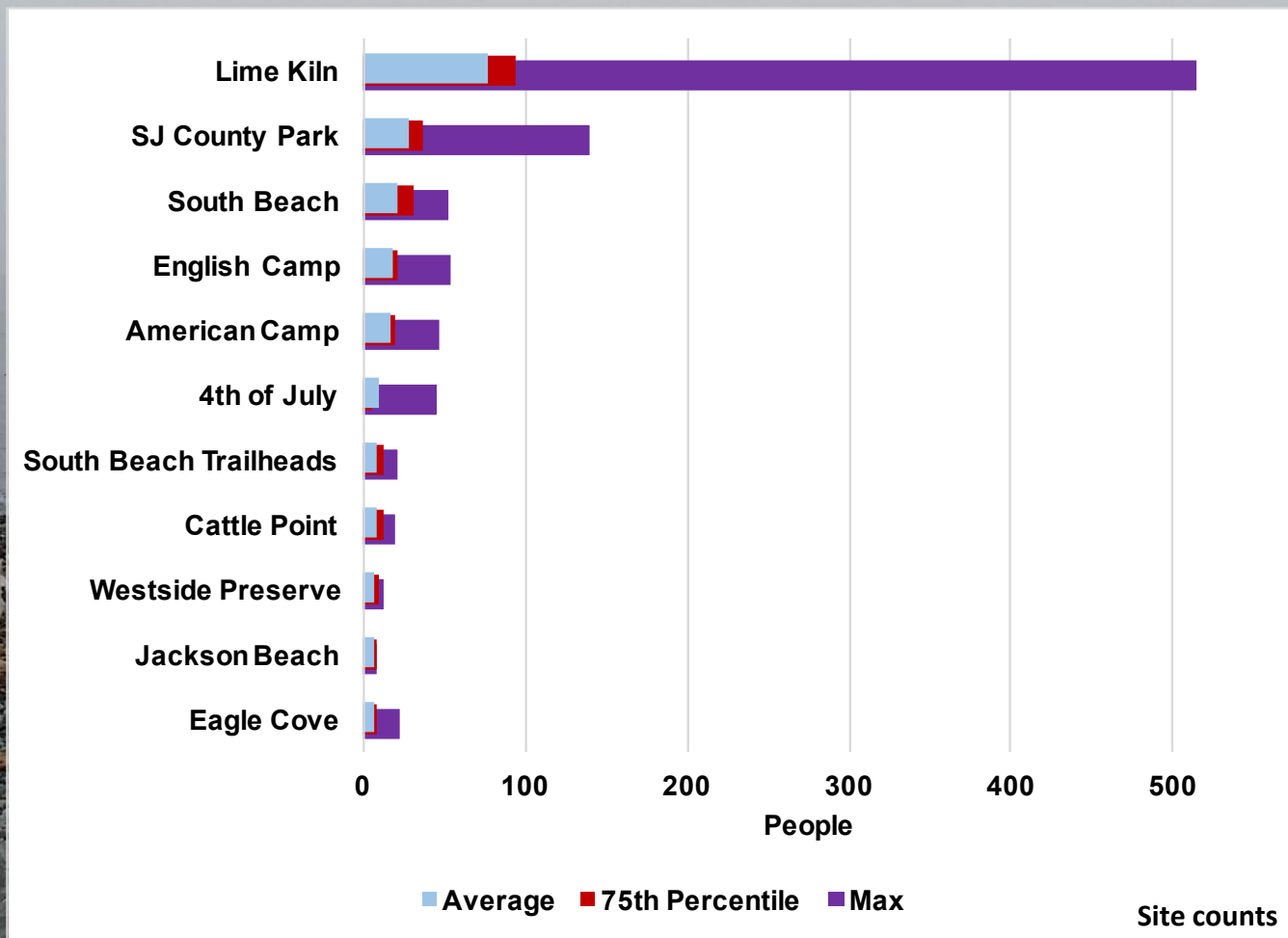
Use has increased over years

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

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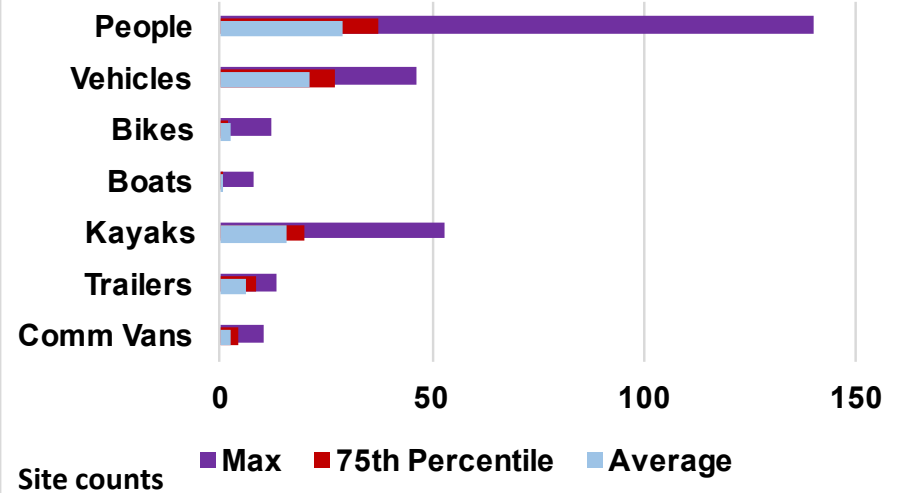
San Juan Island – People counts at all sites



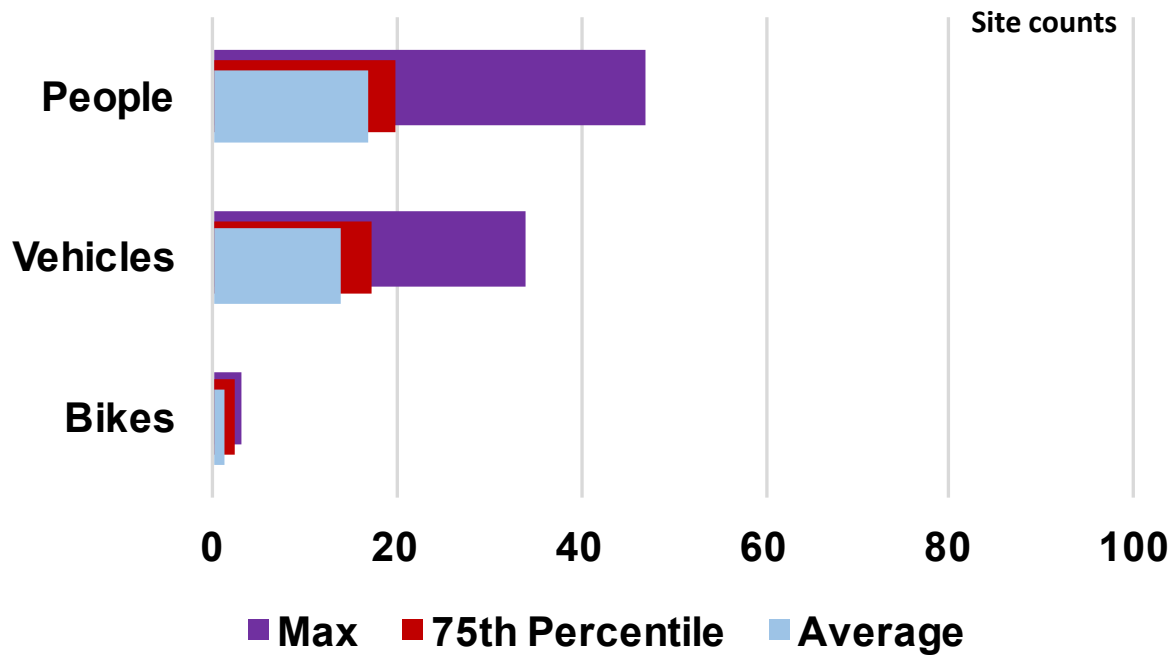
San Juan County Park



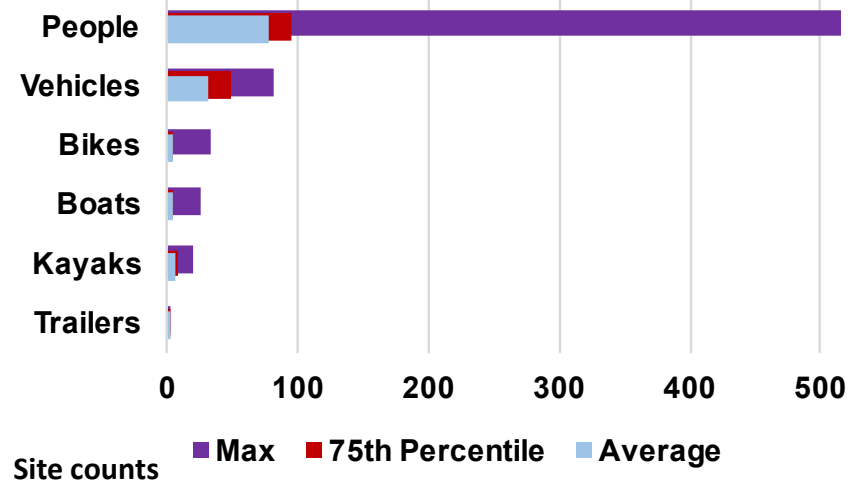
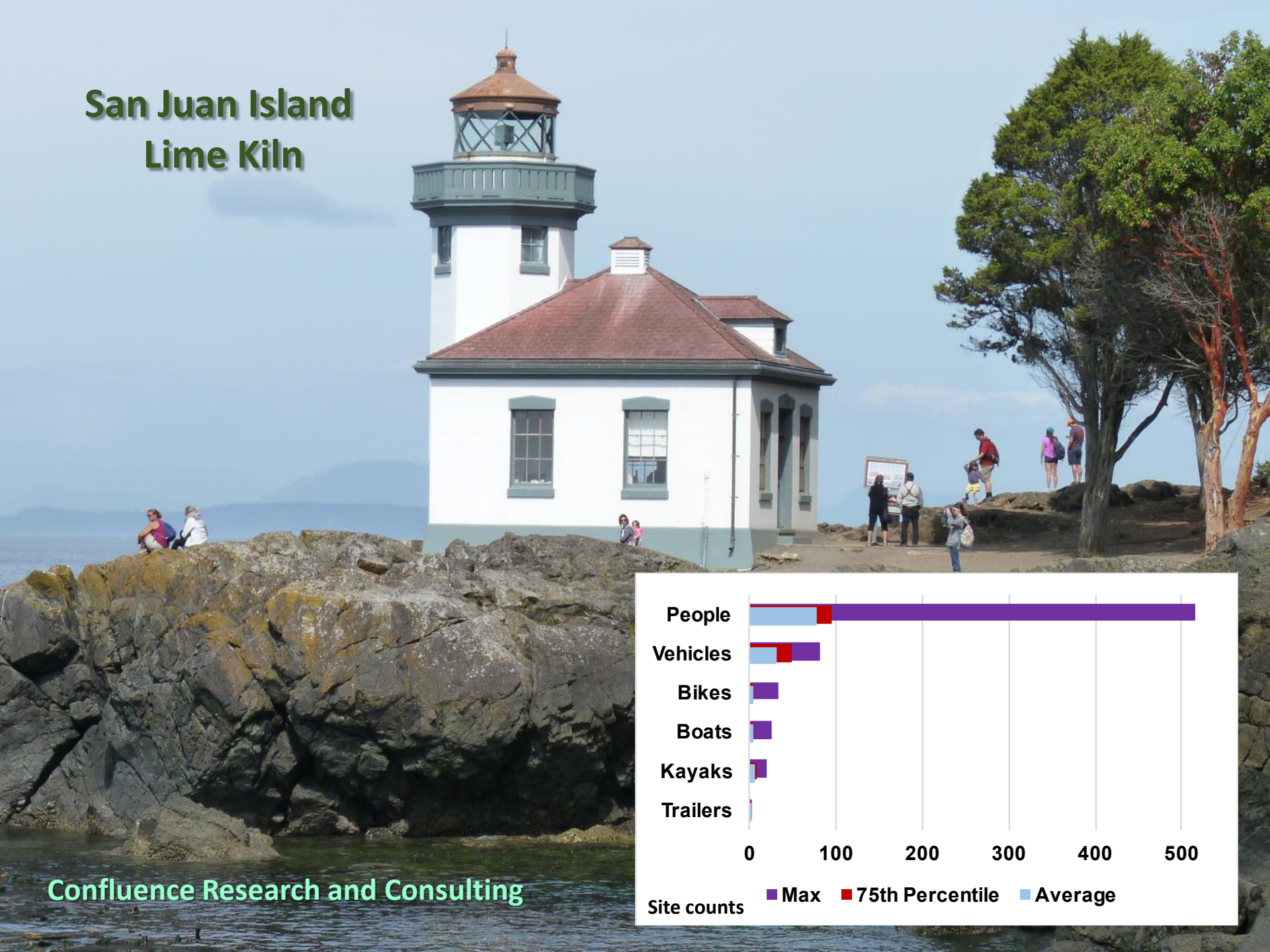
Confluence Research and Consulting




San Juan Island American Camp



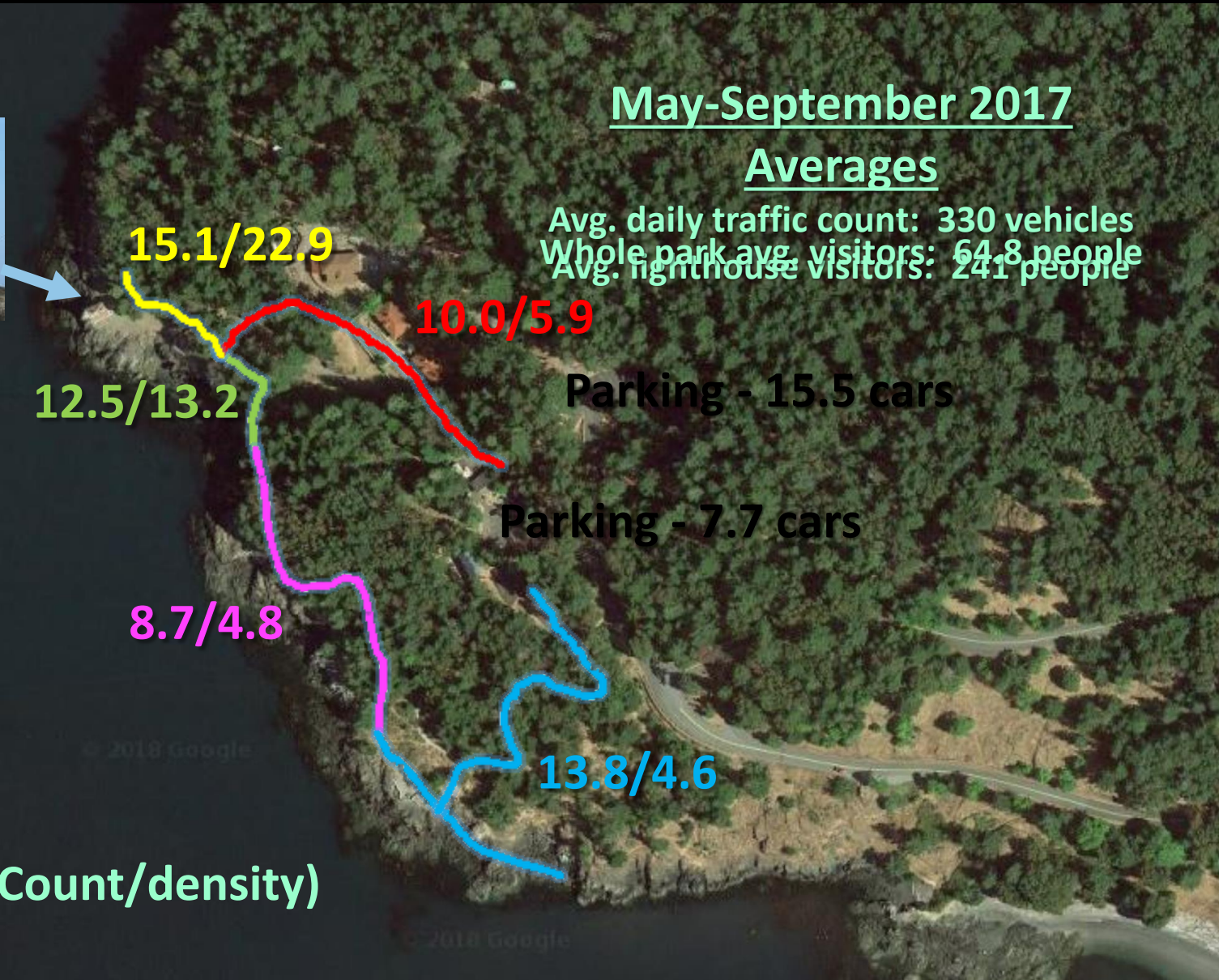
San Juan Island Lime Kiln





Lime Kiln, 105 people
~200 in area

Lime Kiln use densities – people per 100 yards of trail



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

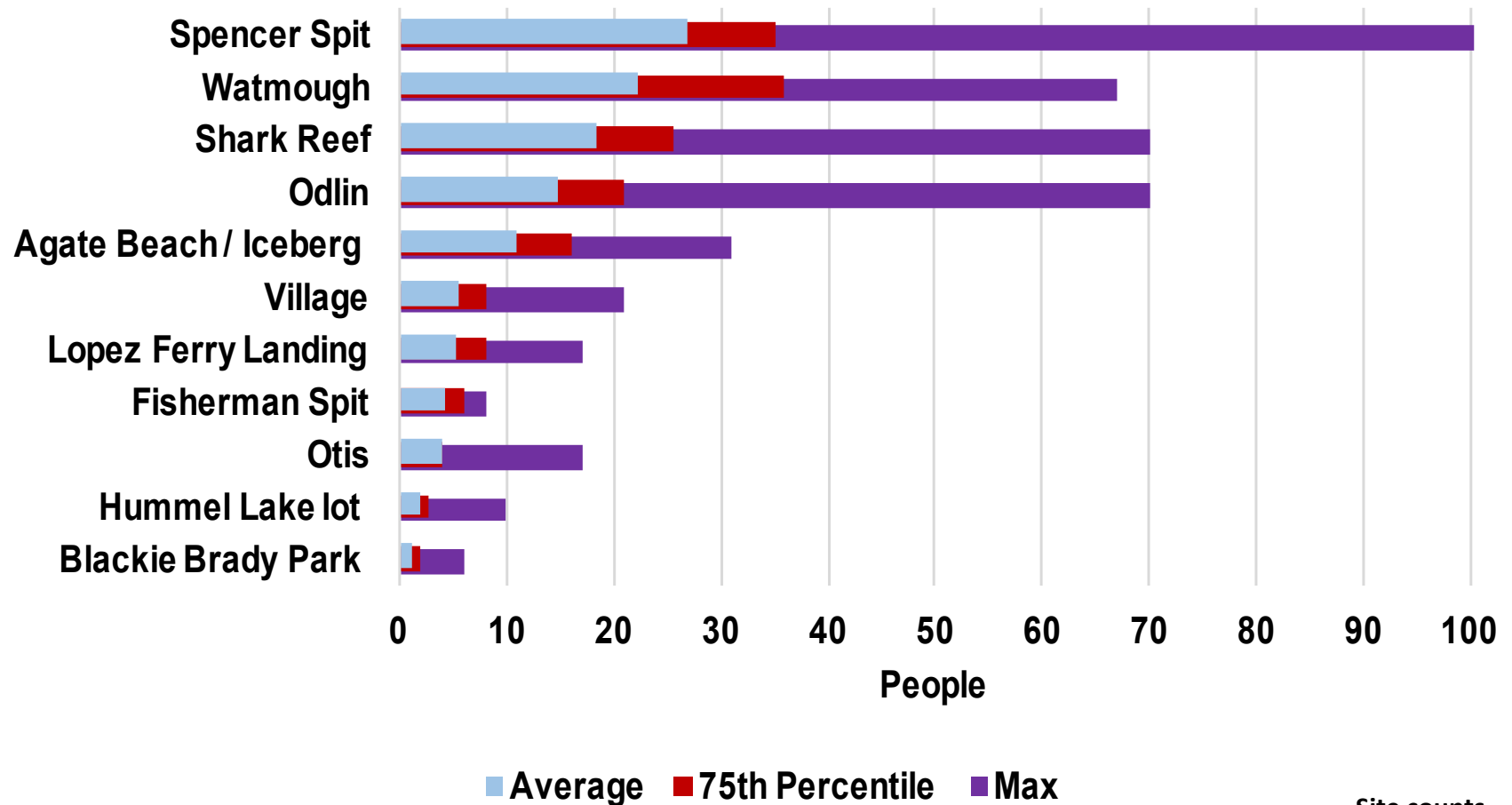
Parking - 2 cars

1/0.6

0/0.0

(Count/density)

Lopez Island All Sites



Site counts

Crowding

*Onsite and ferry surveys –
comparison to many other studies*



Crowding

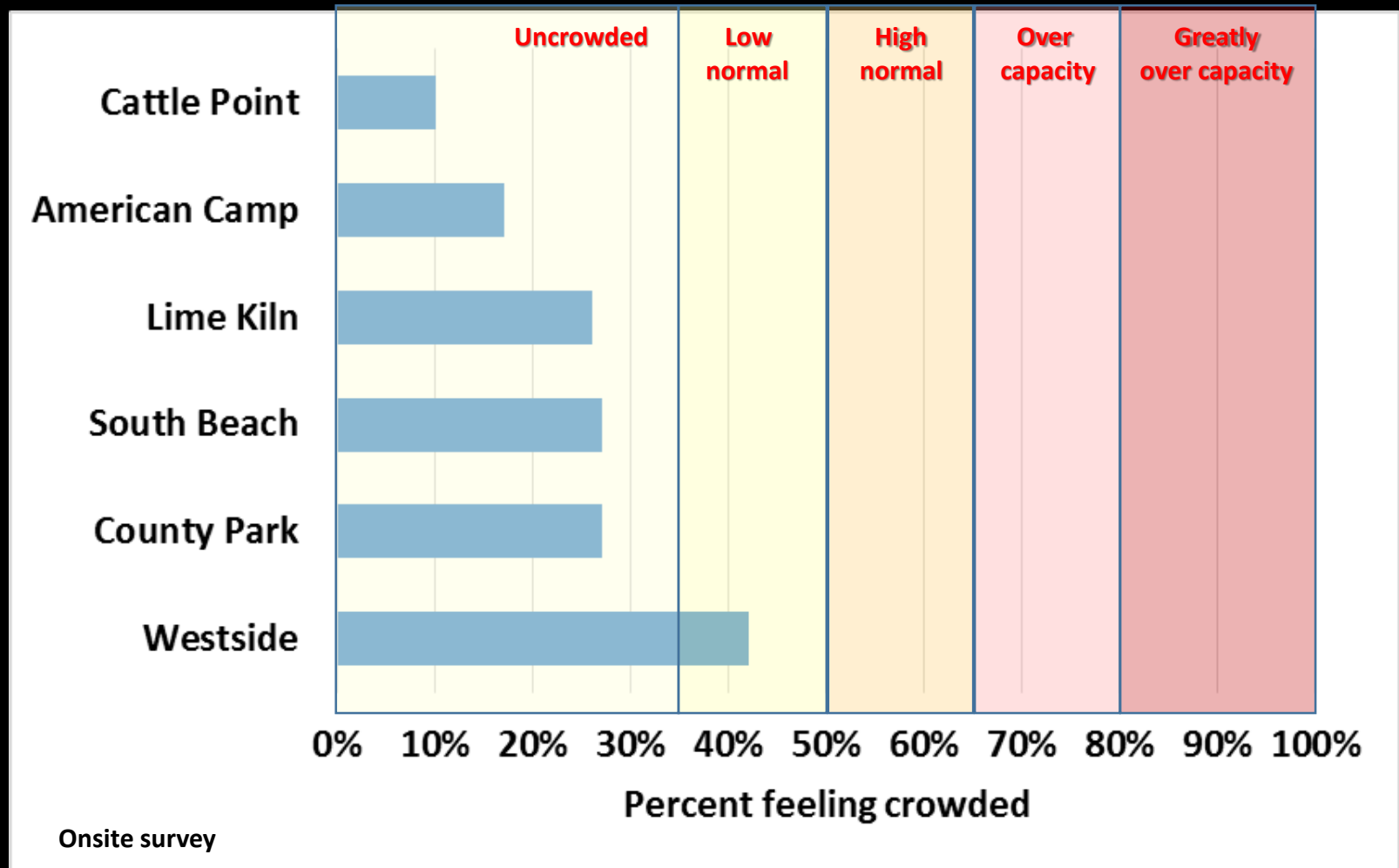
**“How crowded did you feel
in the following locations during your visit?”**

	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...**

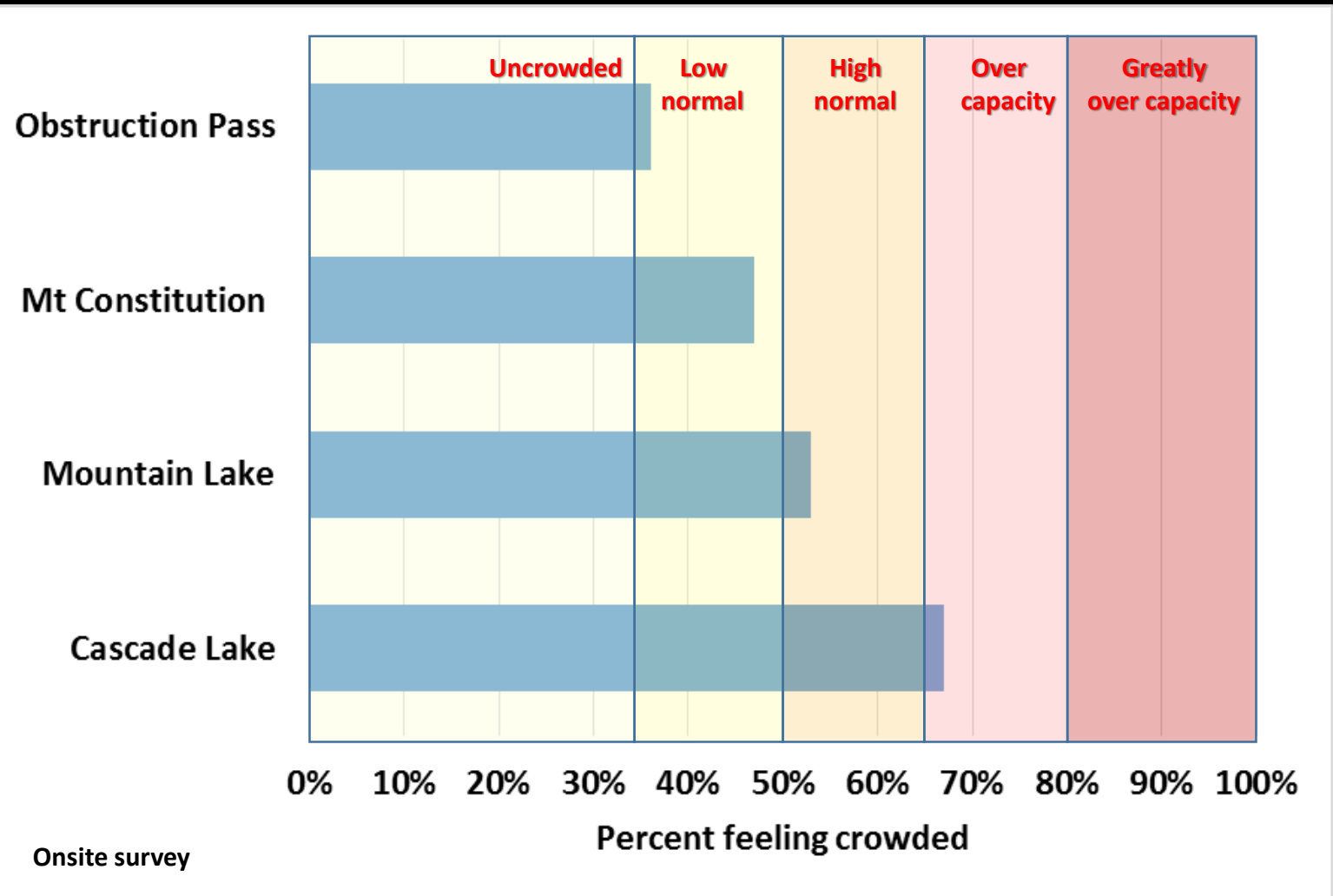
“Rule of thumb” indicator of capacity...

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

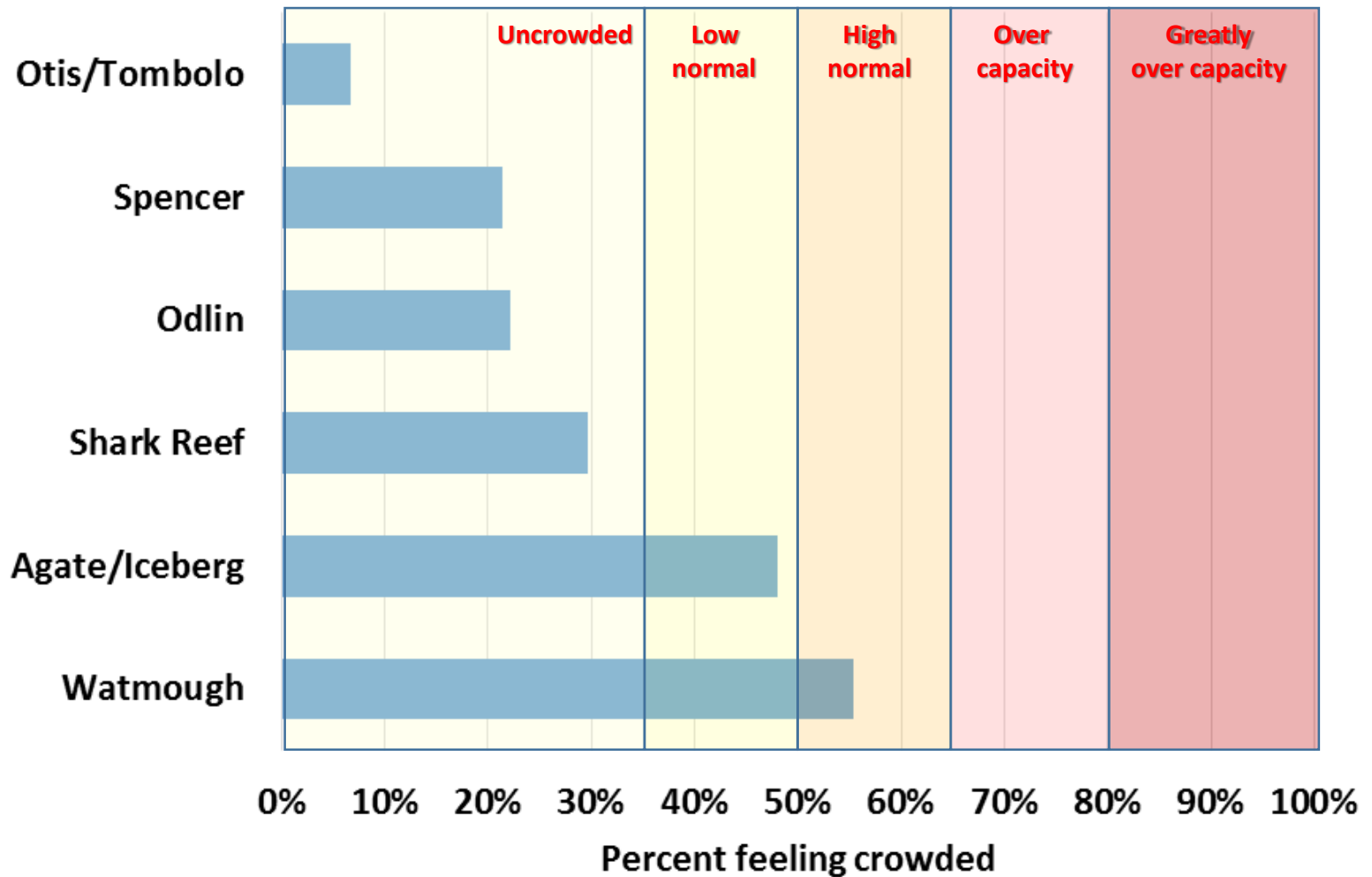


Surprisingly low levels of crowding (compared to other islands' sites)
Especially Lime Kiln and County Park (see further analysis below)

Orcas Island – Percent feeling crowded at sites (overall)

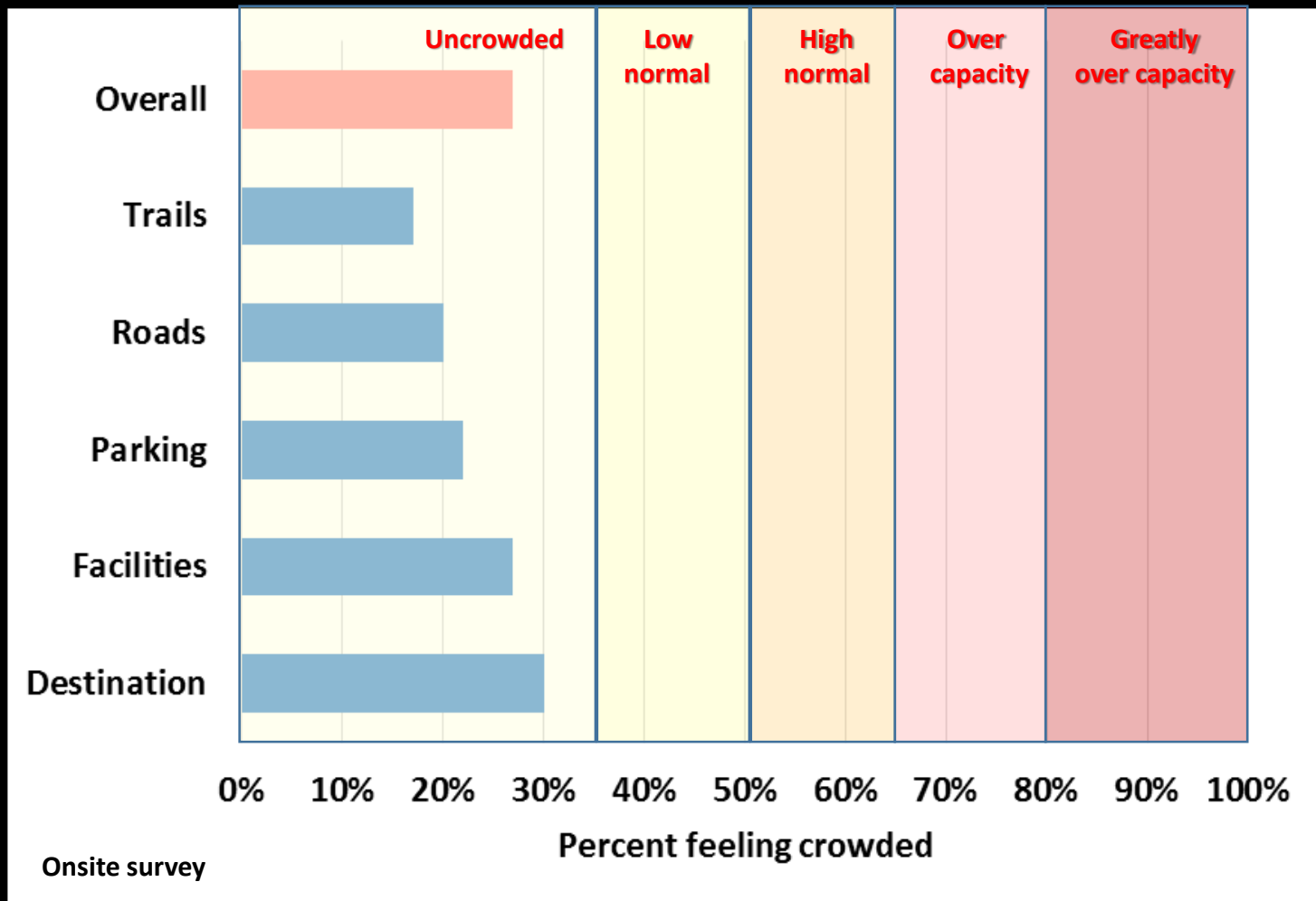


Lopez Island – Percent feeling crowded at sites (overall)

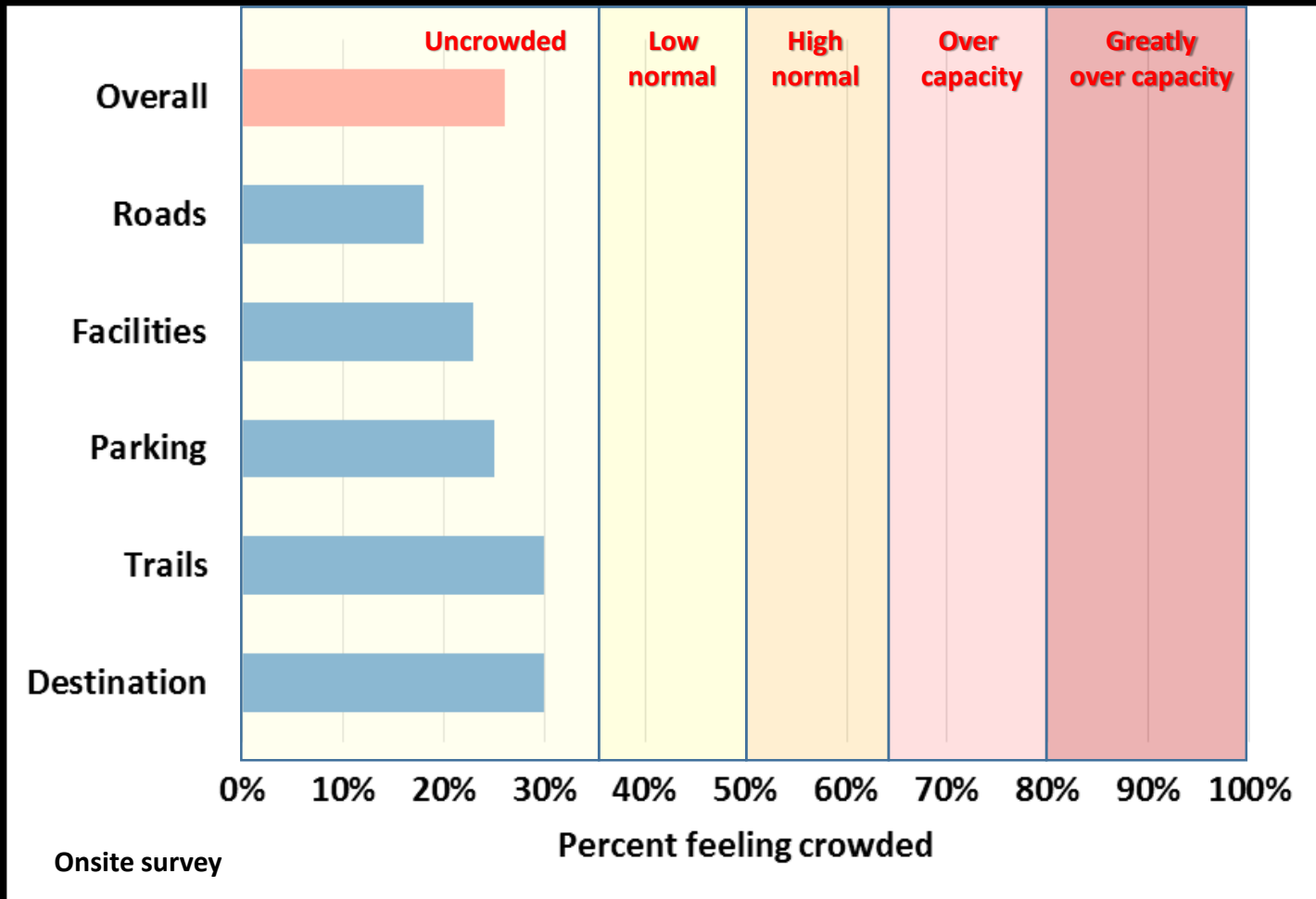


Onsite survey

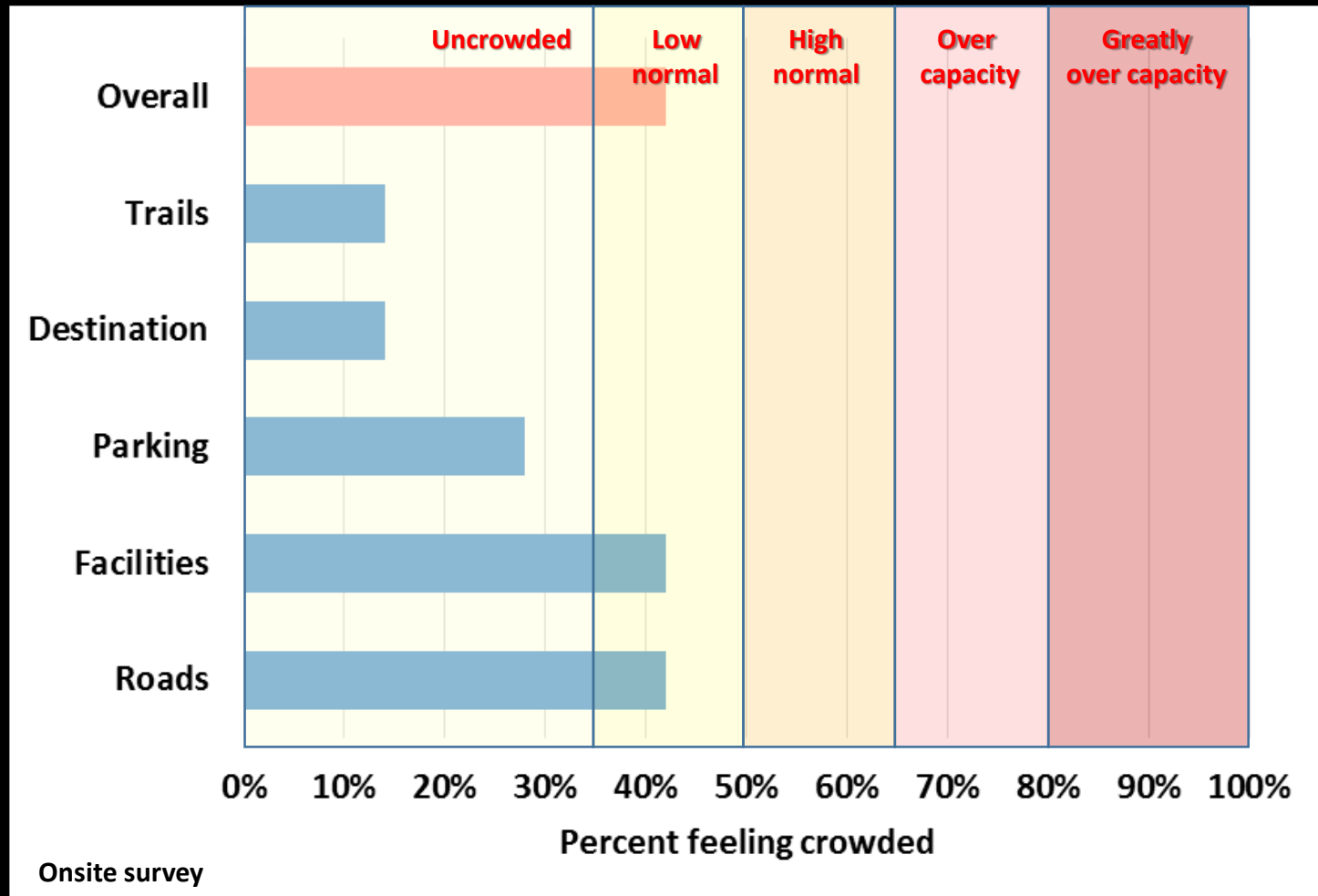
Back to San Juan Island – Percent feeling crowded at County Park



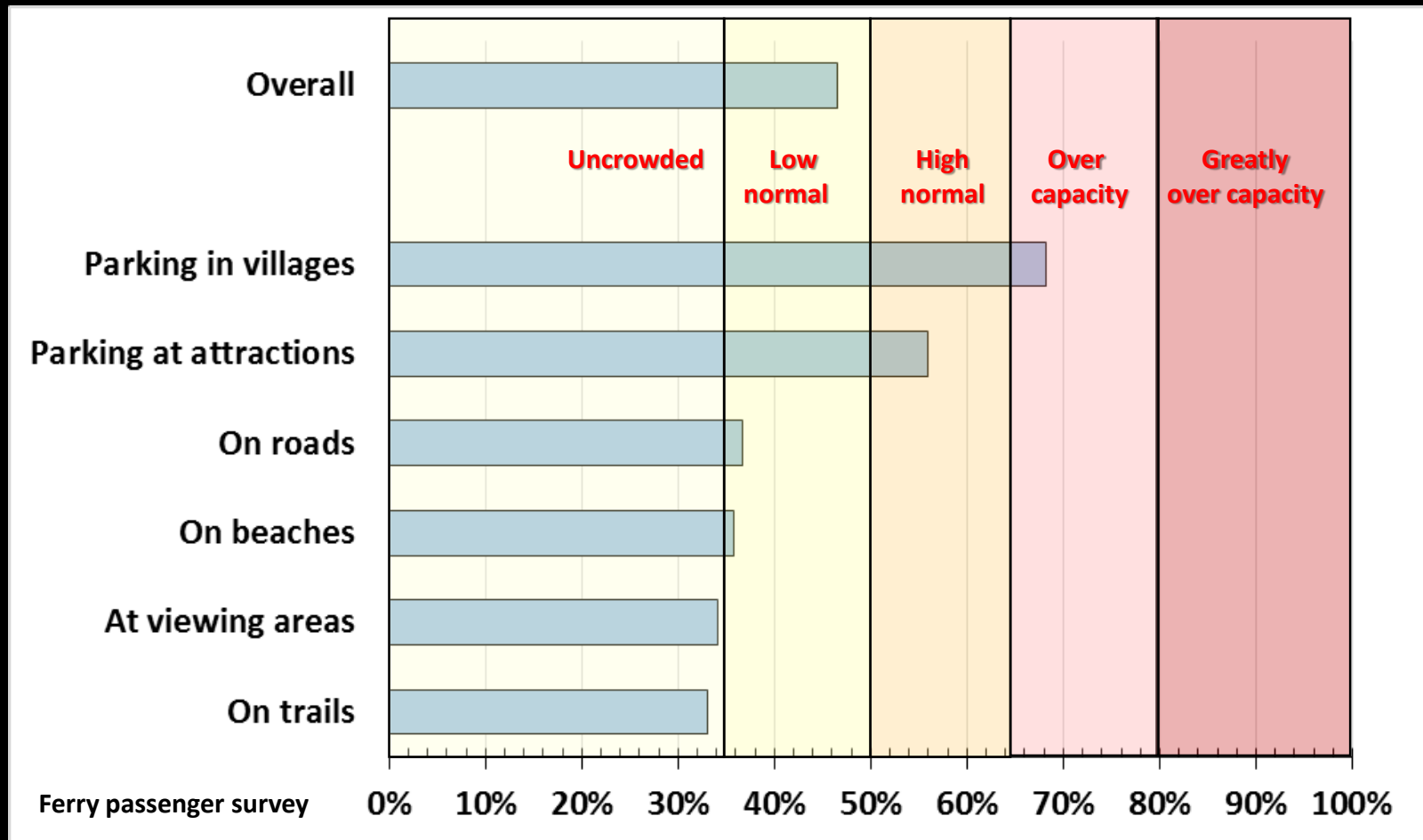
San Juan Island – Percent feeling crowded at Lime Kiln



San Juan Island – Percent feeling crowded at Westside Preserve



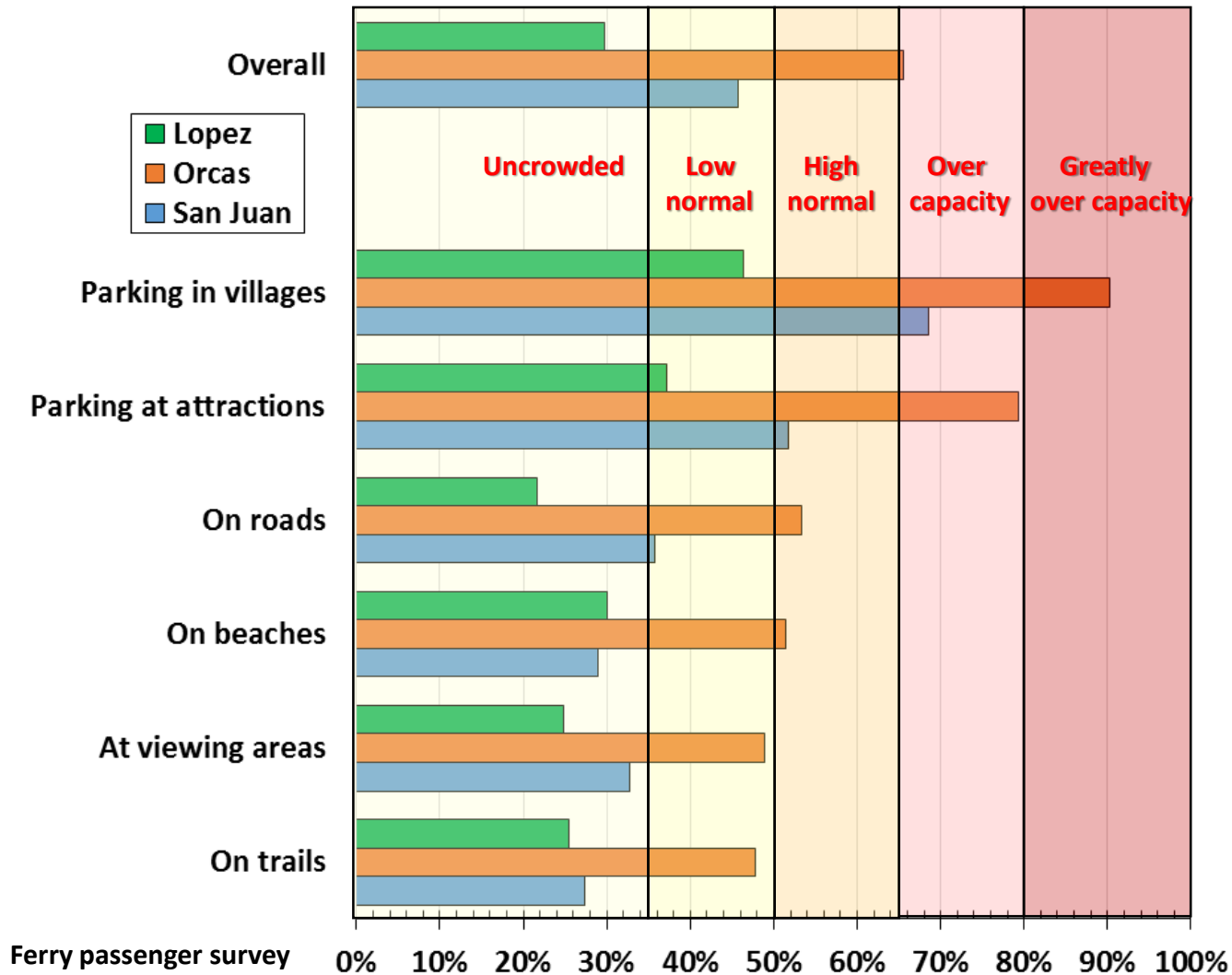
Percent of all ferry visitors feeling crowded



**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



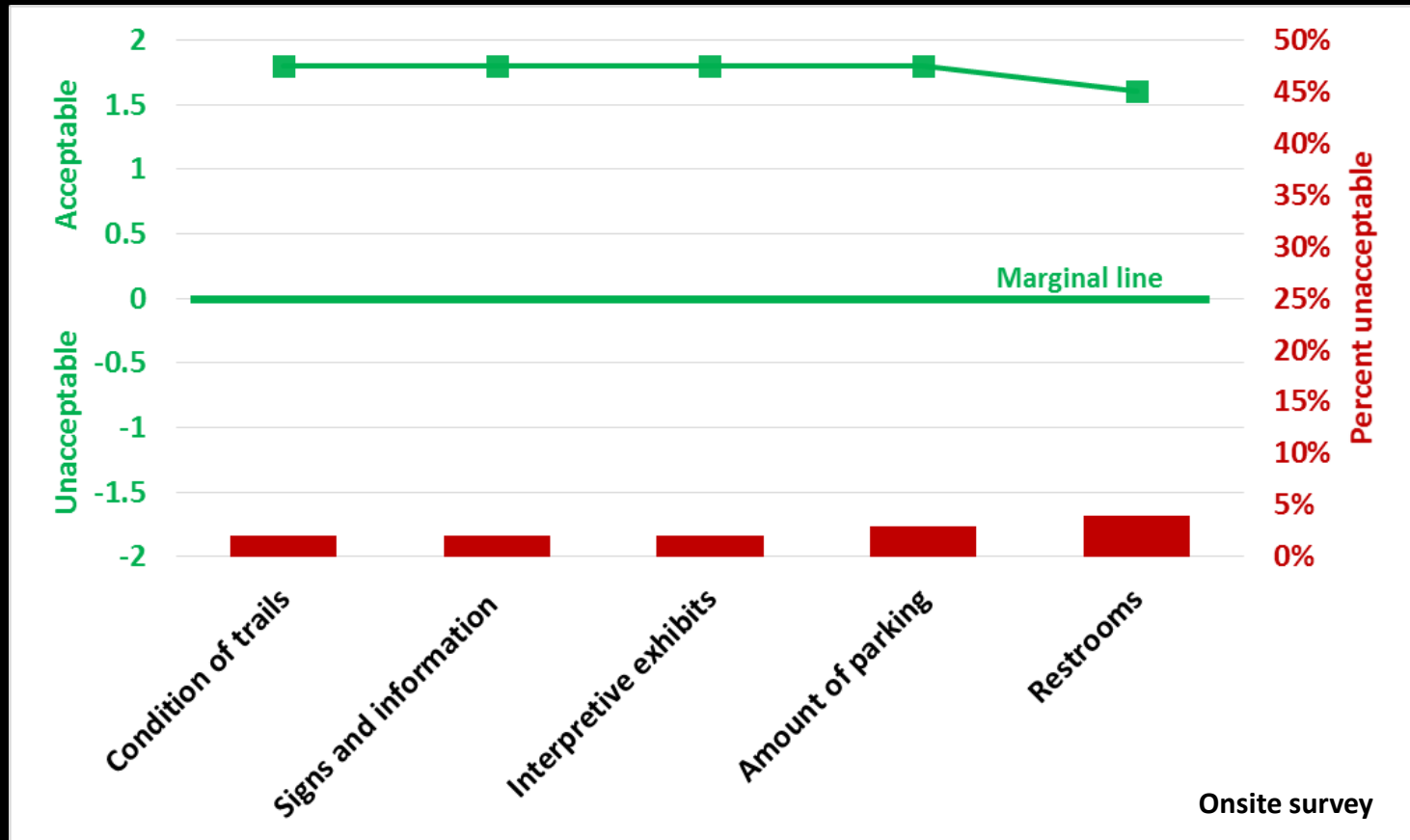
- Orcas > San Juan > Lopez for most contexts

- 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): _____

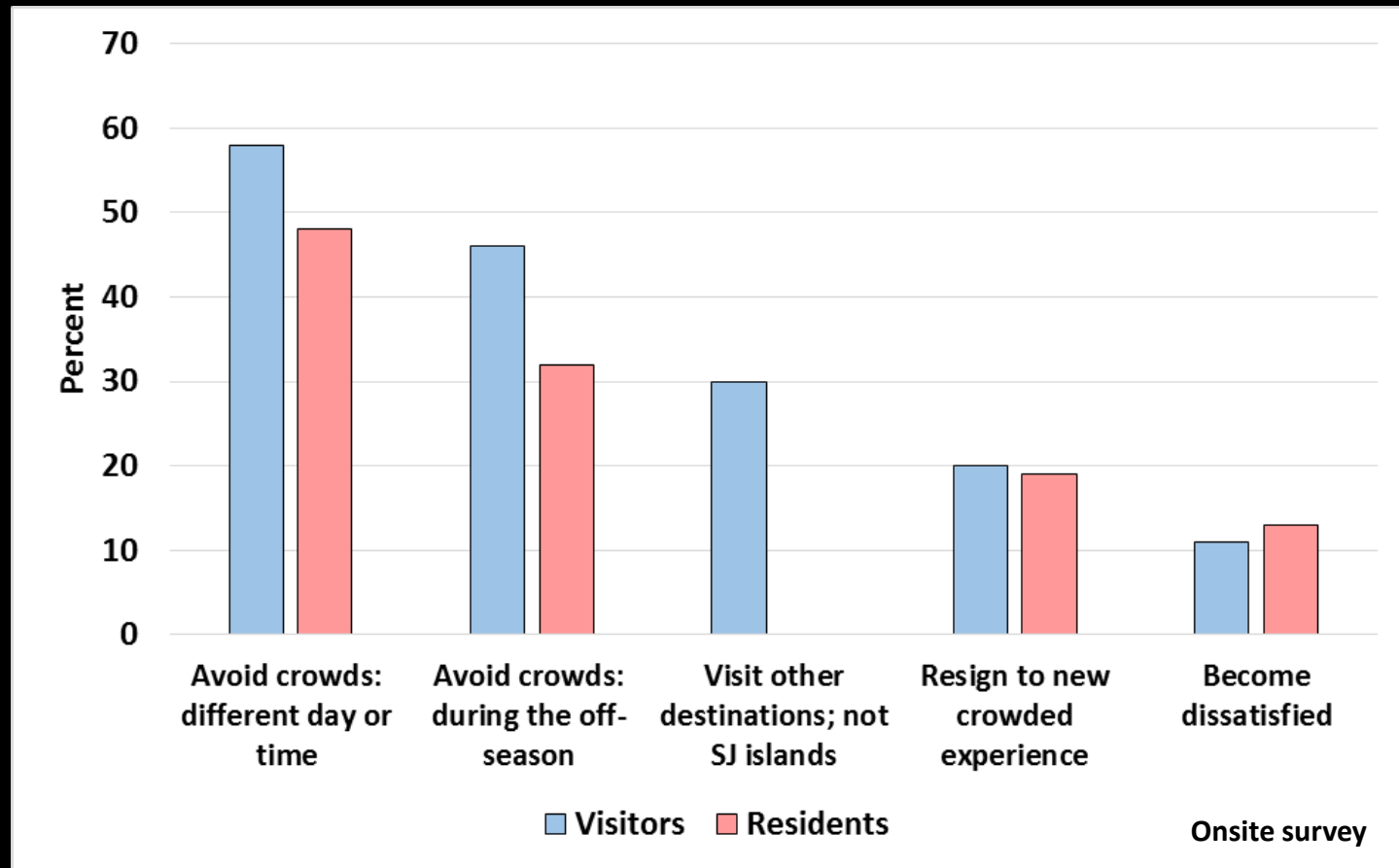


Coping with increased visitation

From ferry survey – all islands

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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%)

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Evaluations of use levels

Ferry survey



Beach Photos

©CRC

Photo A



Photo B



Photo C



Photo D

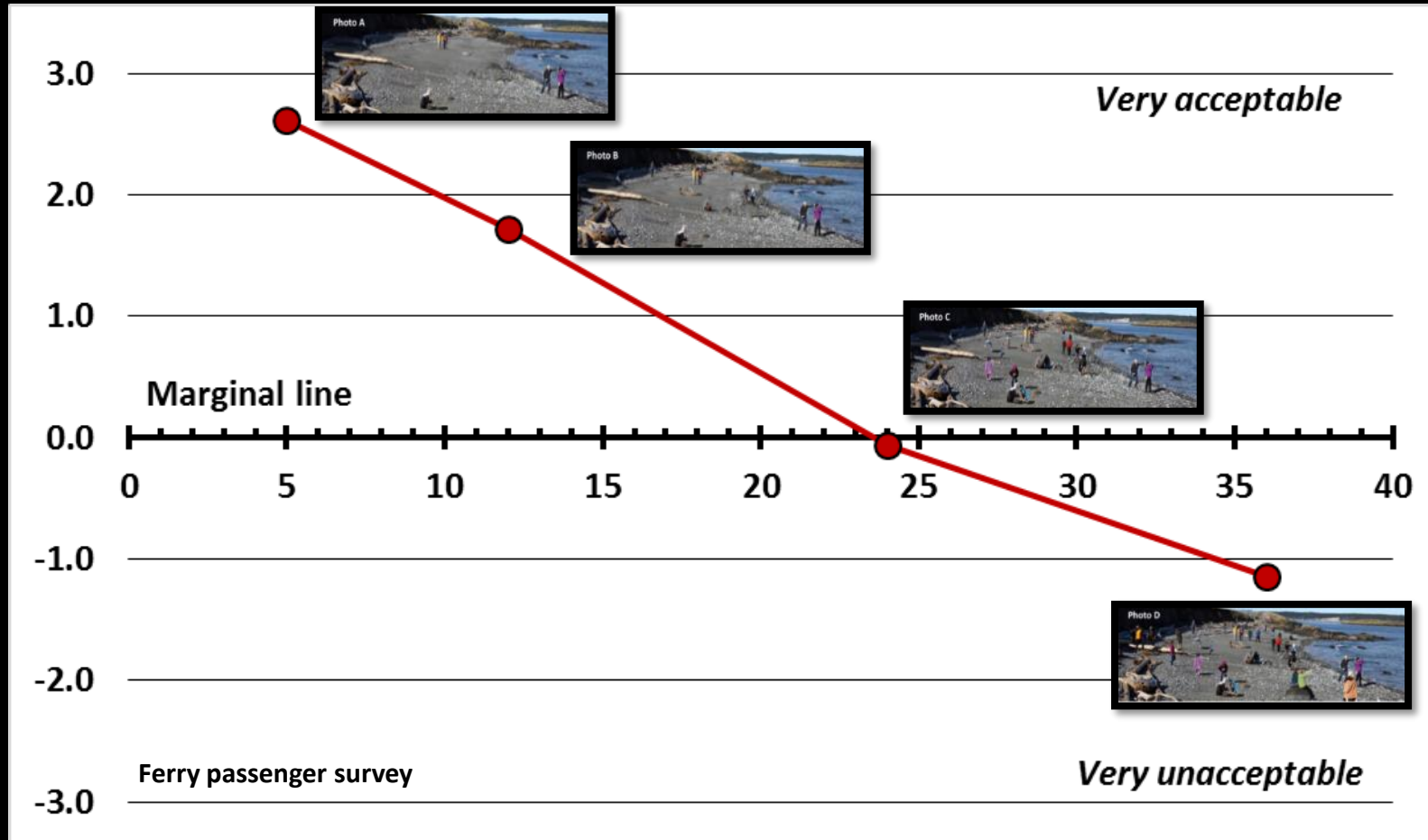


Evaluating use at
beaches

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

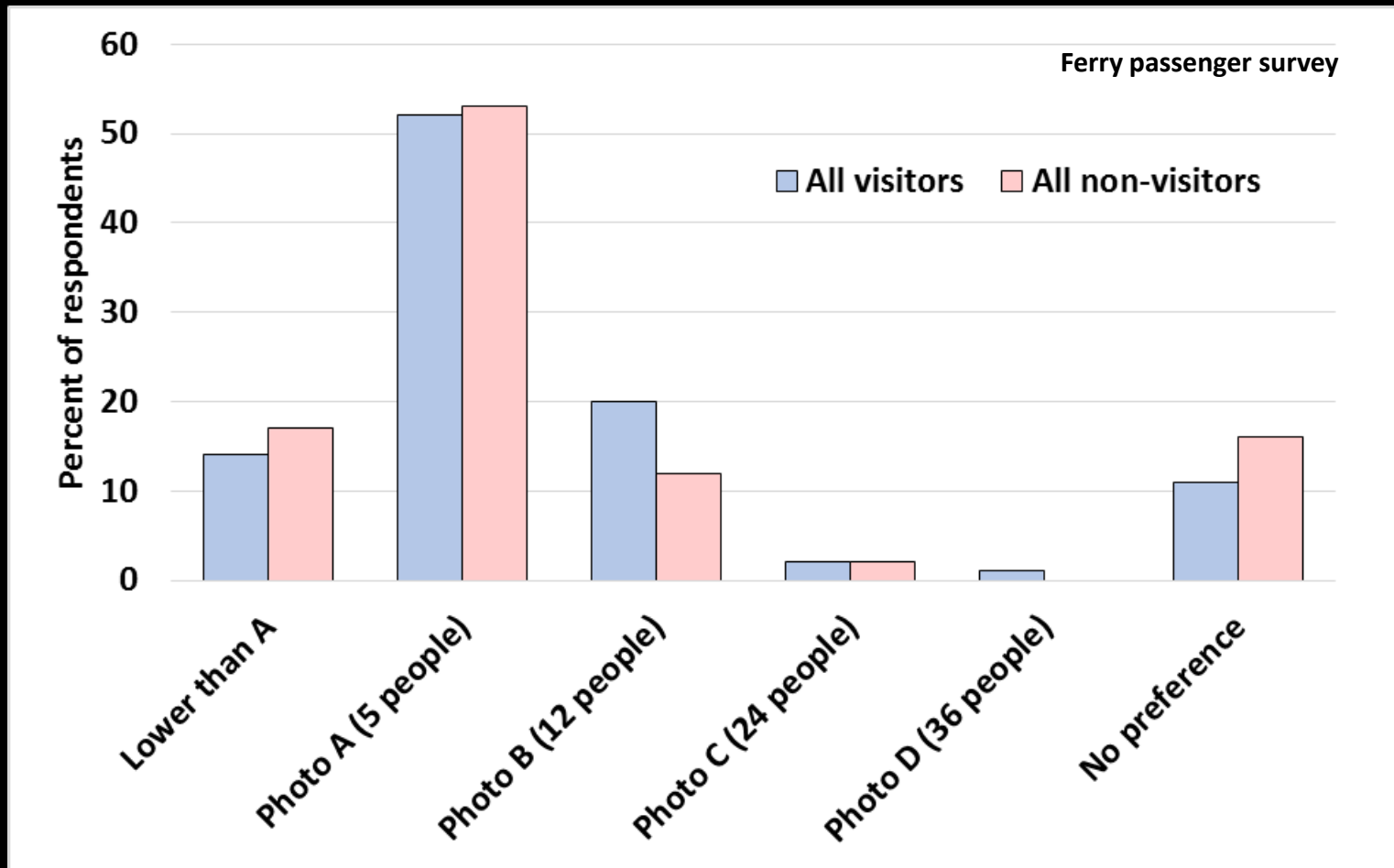


5 and 12 people acceptable; 24 at margin; 36 clearly unacceptable
No statistical differences between islands or visitors/residents

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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

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Evaluating use at marine wildlife viewing area

Scenic Photos

©CRC

Photo E



Photo F



Photo G

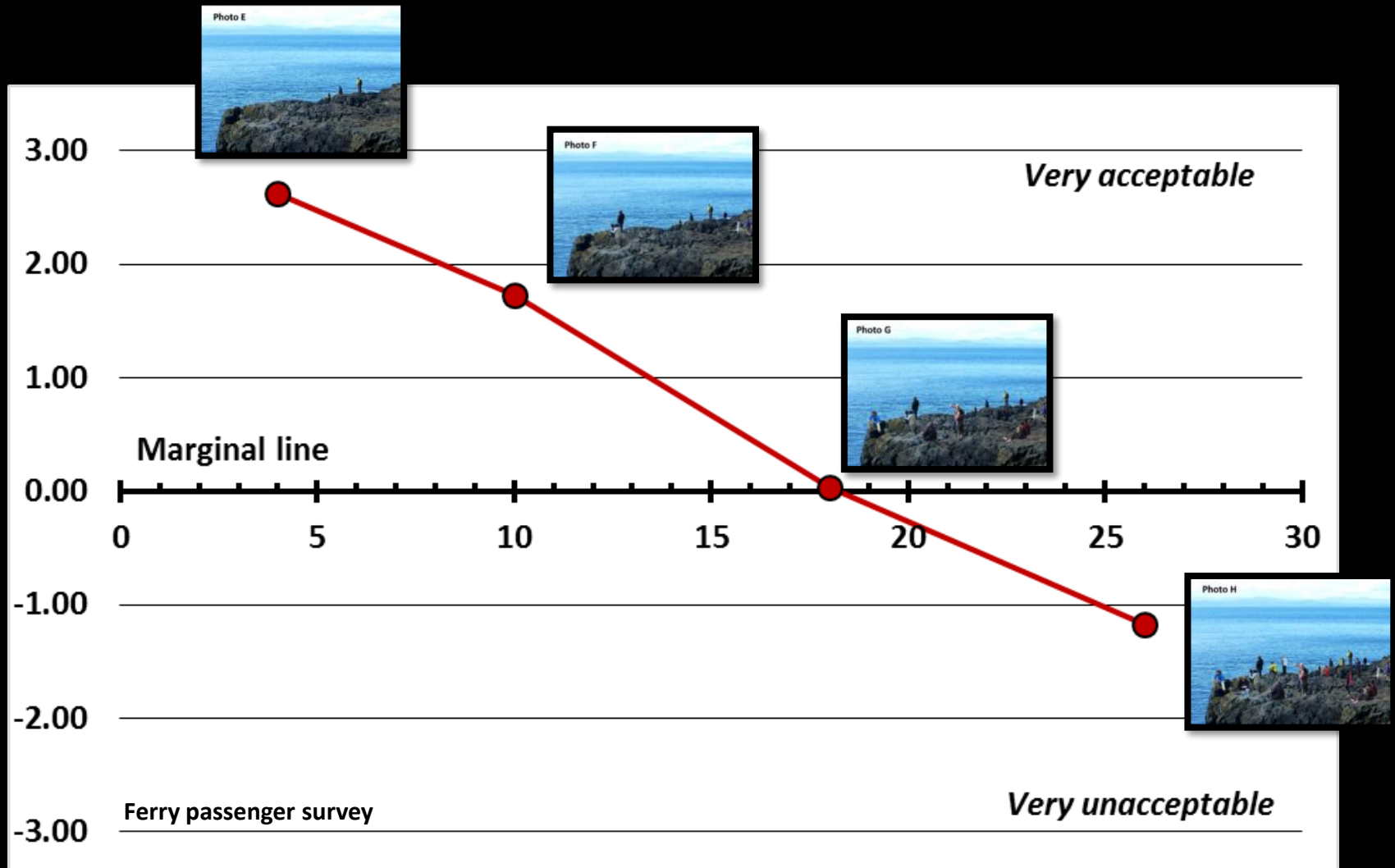


Photo H



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

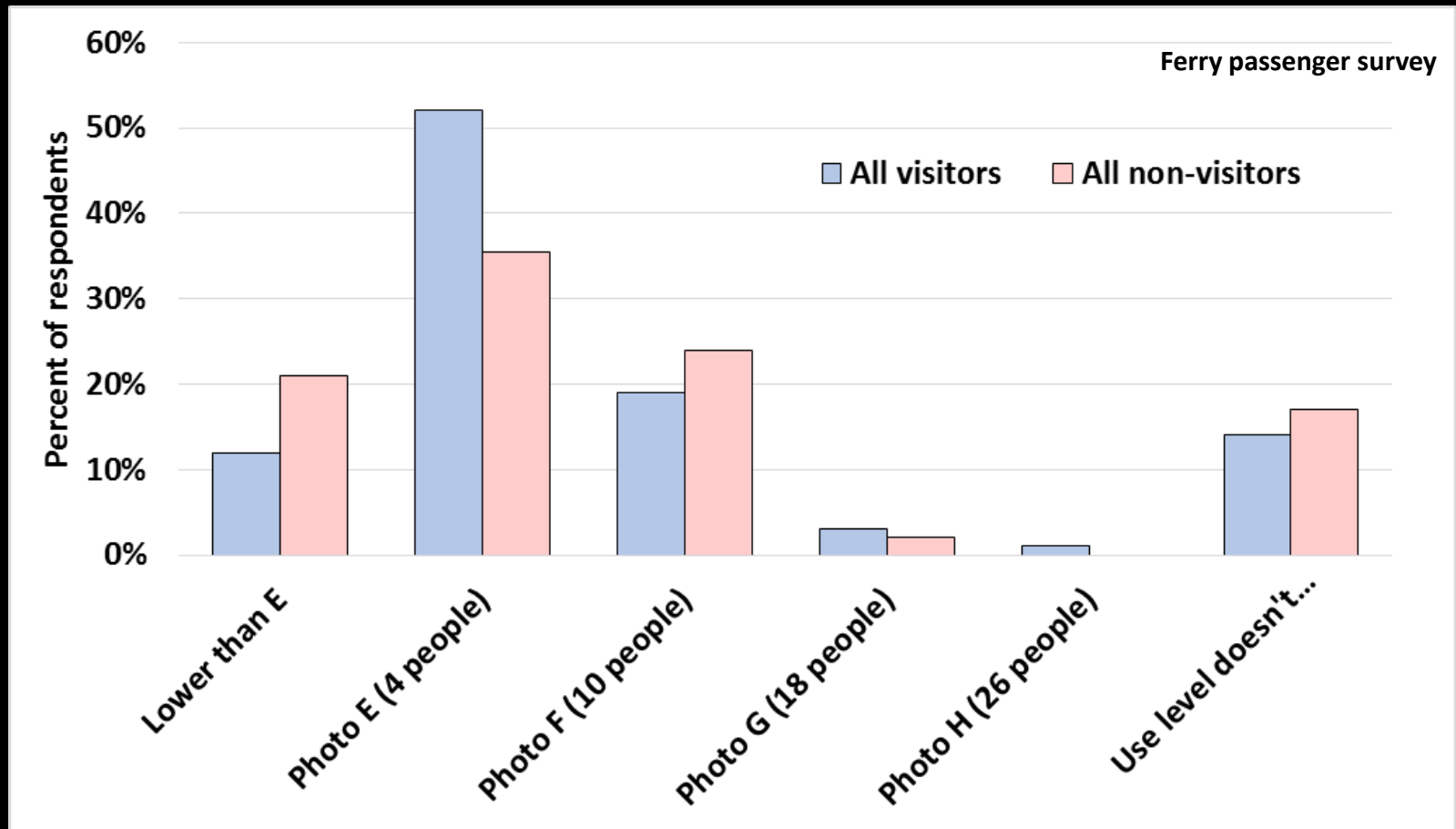
Evaluating marine viewing densities: All respondents



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
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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

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Support for management actions

Ferry survey

Support for management actions

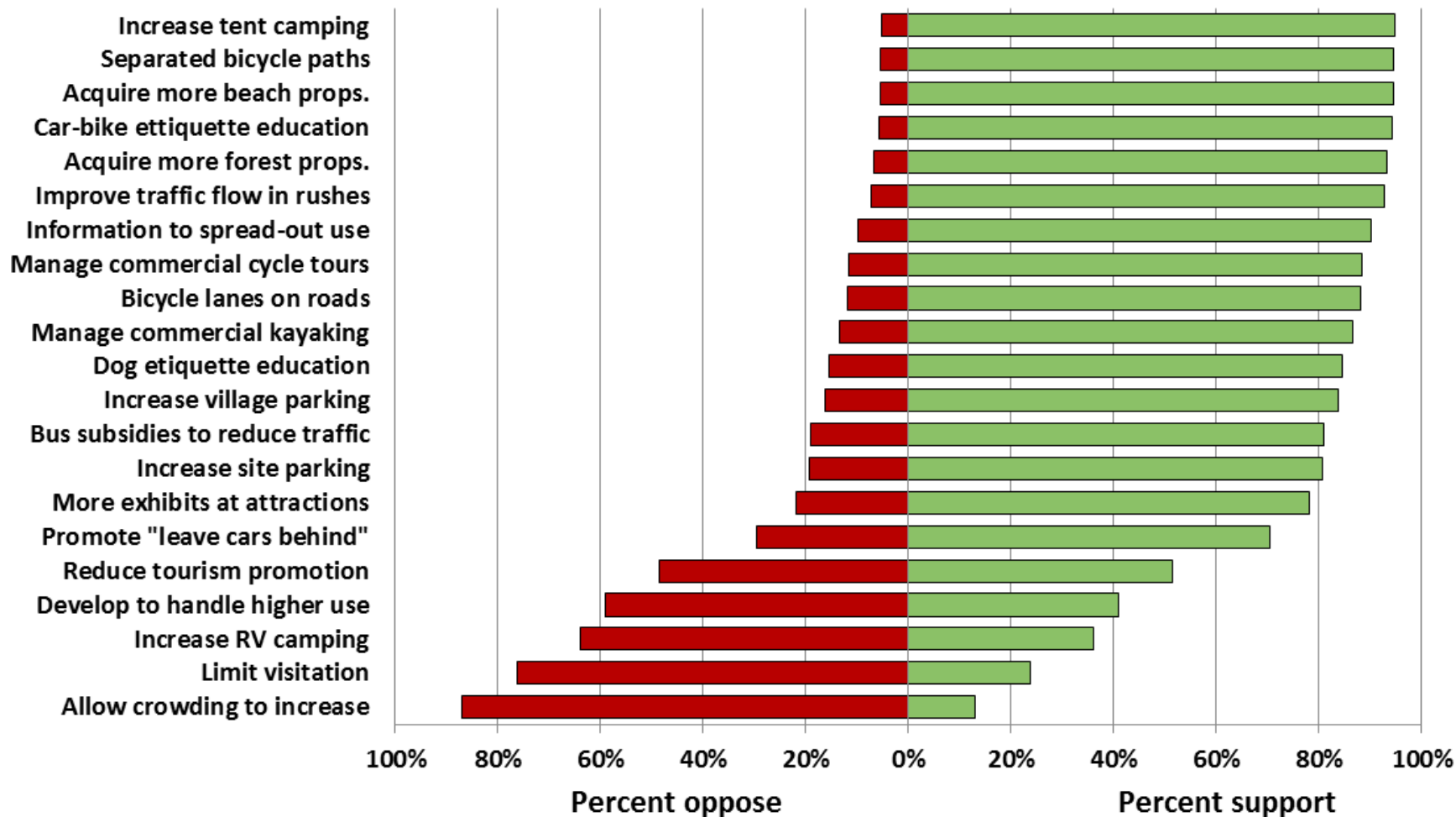
21 different actions



“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.”

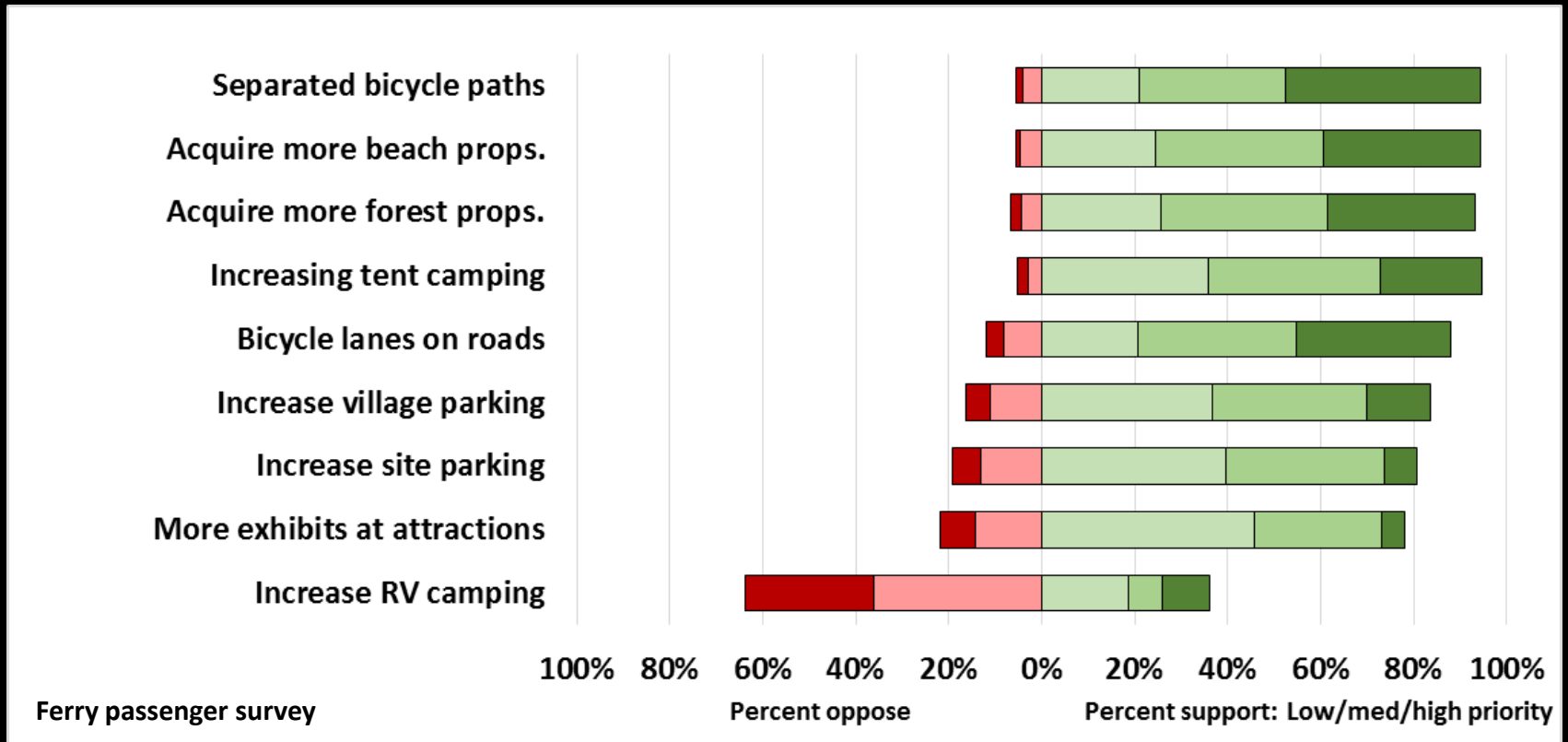
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Support for management actions among all visitors



Ferry passenger survey

Highest priority acquisition/infrastructure actions among visitors



More public land – shore > forest/mountain properties

Separated bicycle lanes > roadside bike lanes

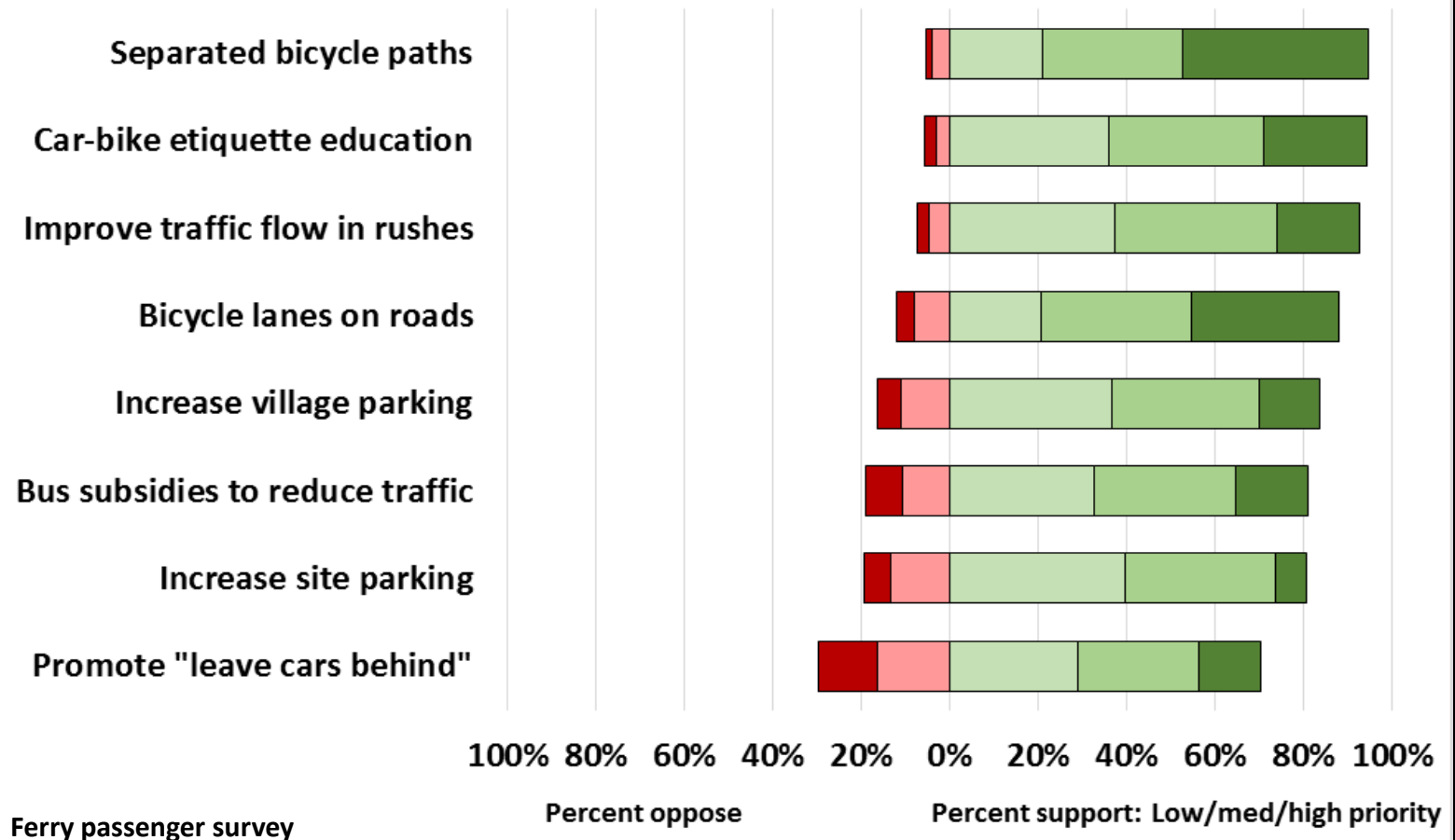
Village parking > site parking

More camping

Interpretive exhibits are lower priority

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Highest priority transportation actions among visitors



Visitors support them all

Separated bike paths > etiquette > bicycle lanes on roads

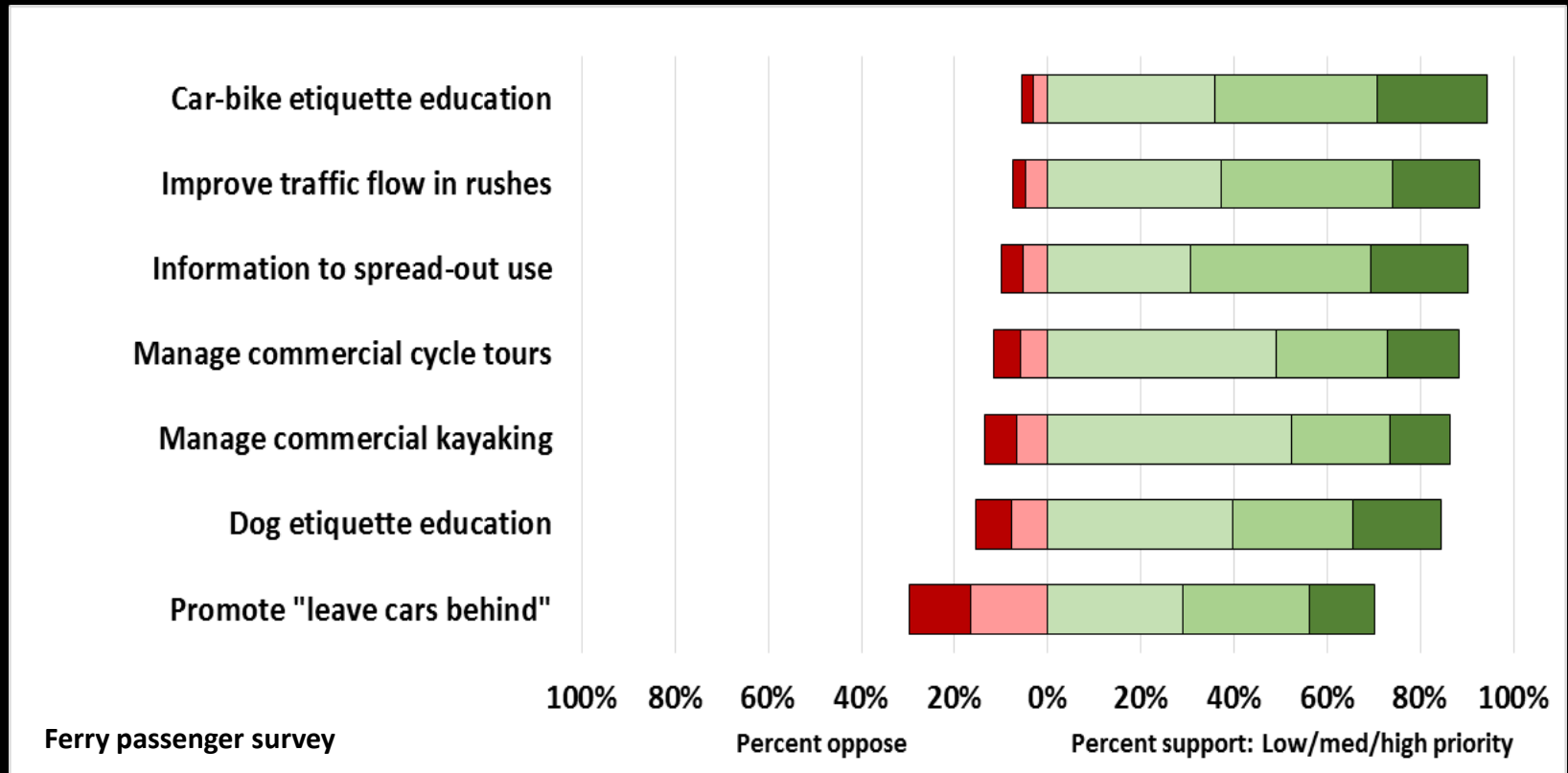
Improve traffic management in ferry rushes

Village parking > site parking

Bus subsidies > "leave cars behind"

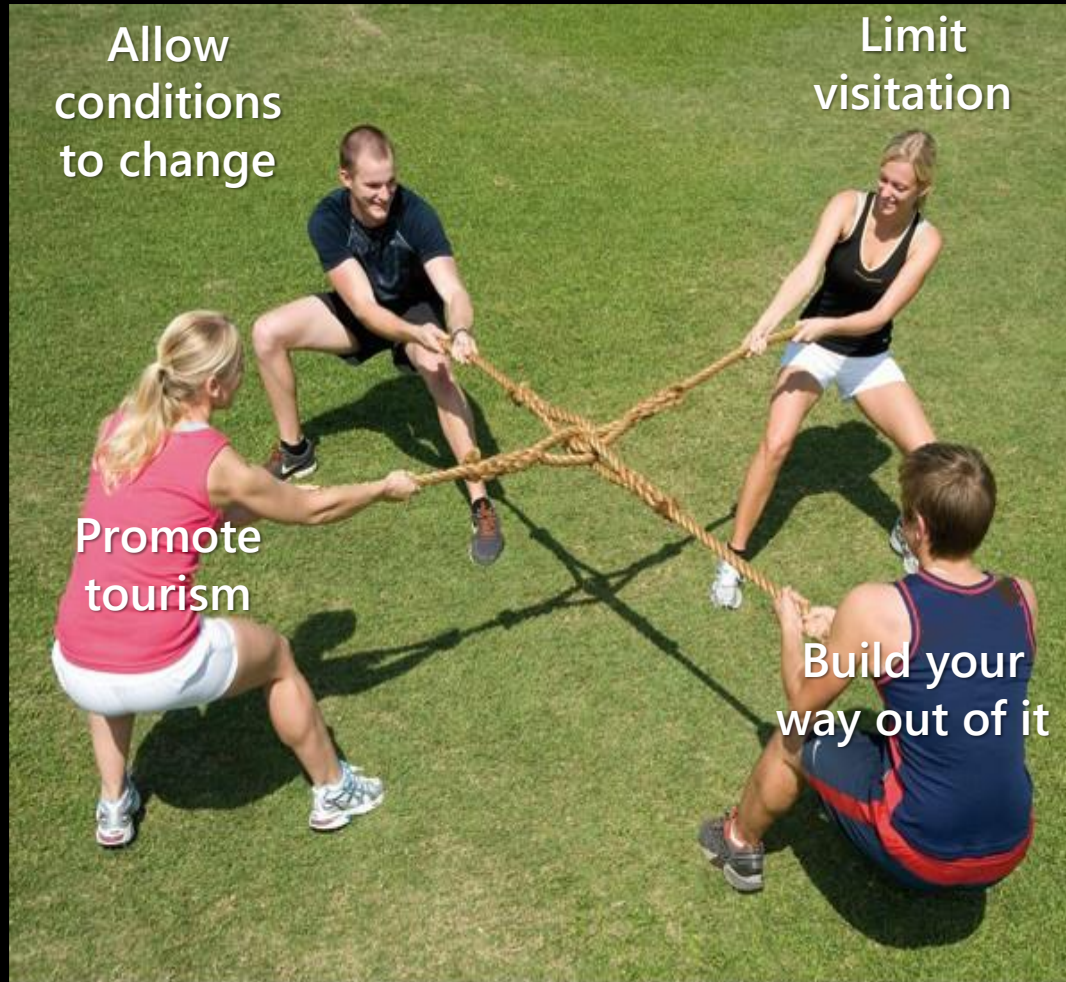
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Highest priority education actions among visitors

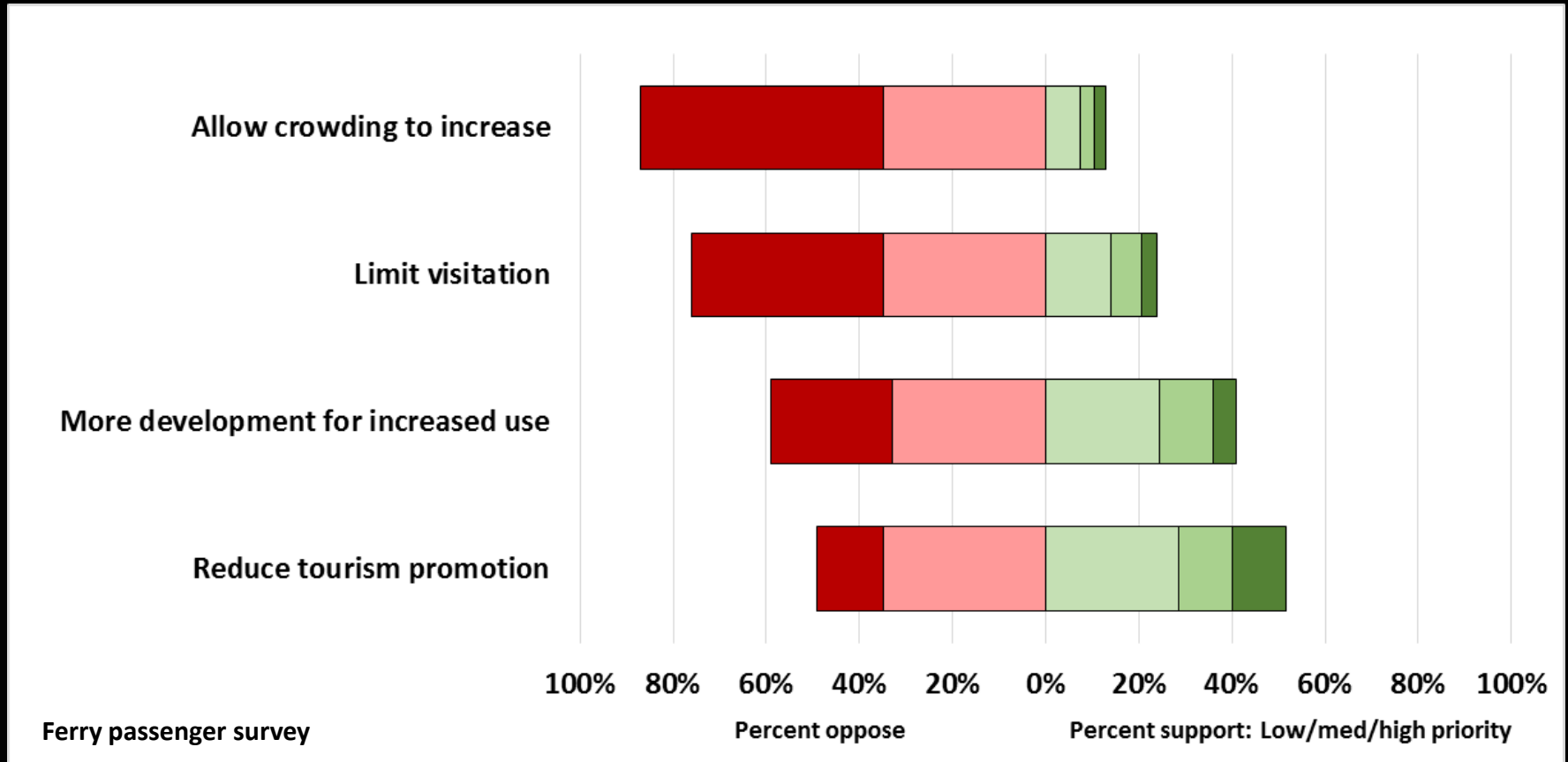


Visitors support them all
Lowest priority is promote "leave cars behind"

Management strategies & trade-offs



Tradeoff strategies – Which do visitors support?



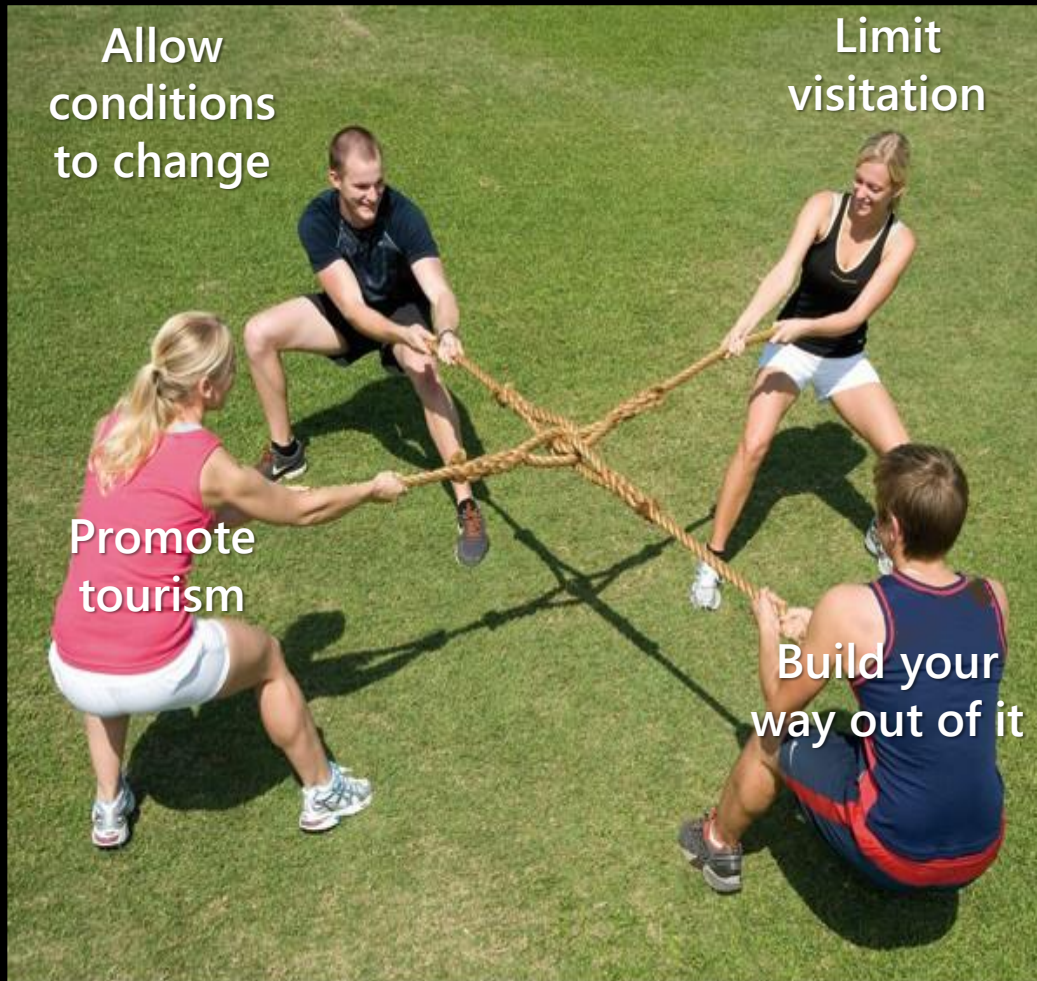
Strongest opposition (87%) to the default strategy: allow increase

Majority opposition to limit visitation (76%)

Majority opposition for “building out of it” (59%)

Mixed opinion toward reducing promotion

Tradeoffs: Use, conditions, infrastructure, and promotion



San Juan visitors: Lean toward infrastructure or allowing conditions

Orcas visitors: Lean toward buying more land and opposes limits

Lopez visitors: Lean toward less promotion, less infrastructure

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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

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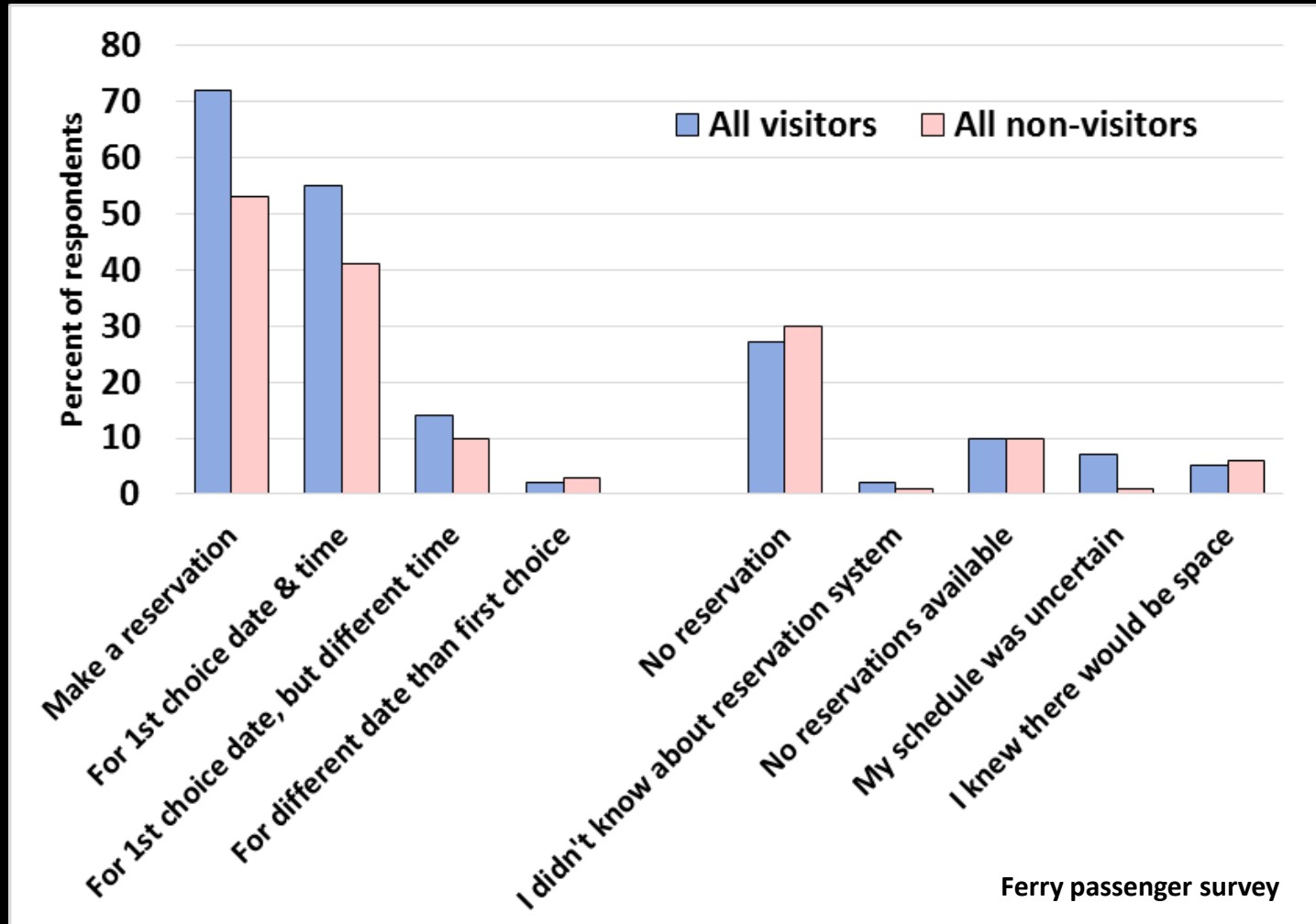
Supplementals



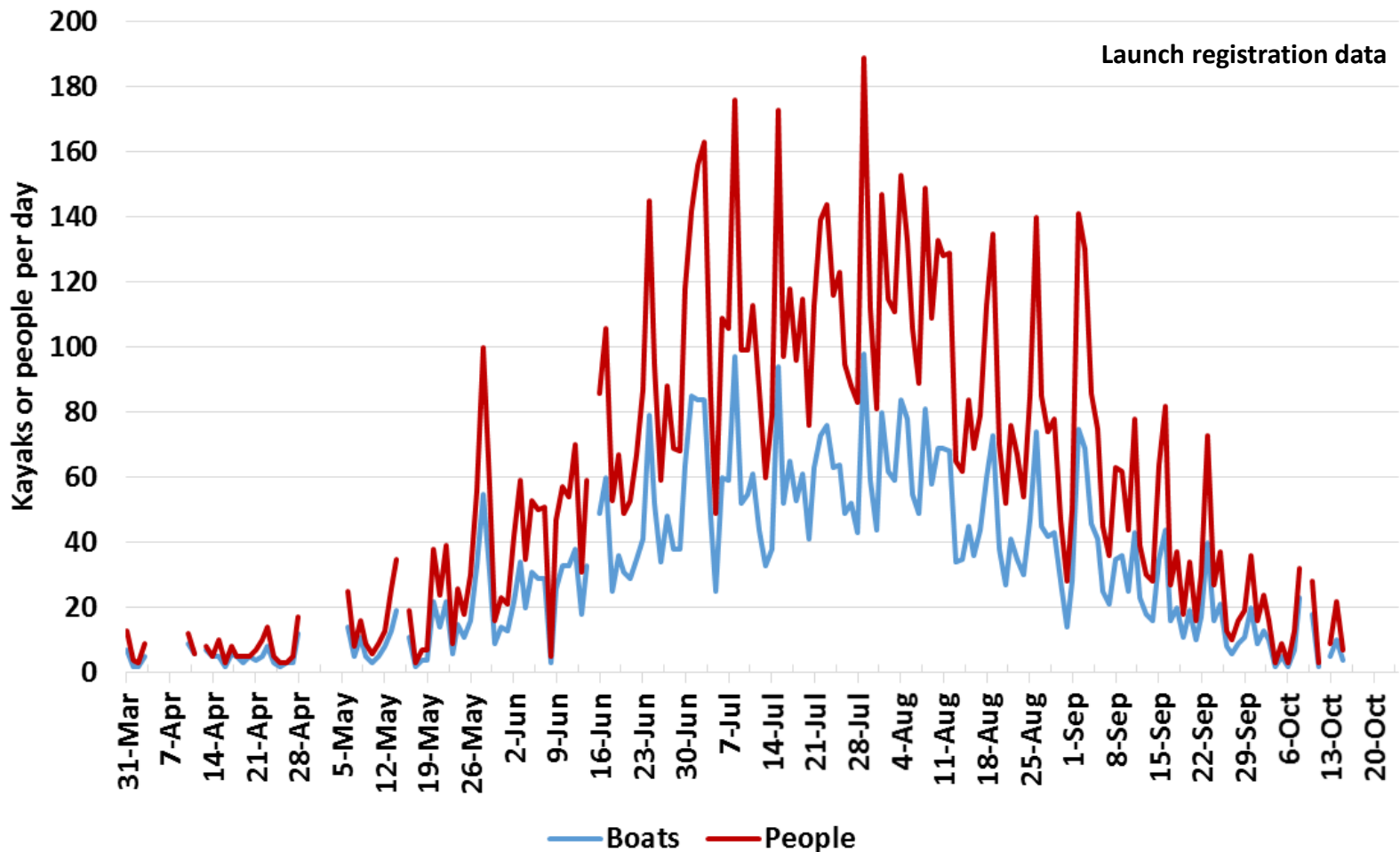
Did you make a reservation for this ferry? (Please check “yes” or “no” and check the boxes that apply)

Yes – and my reservation was...

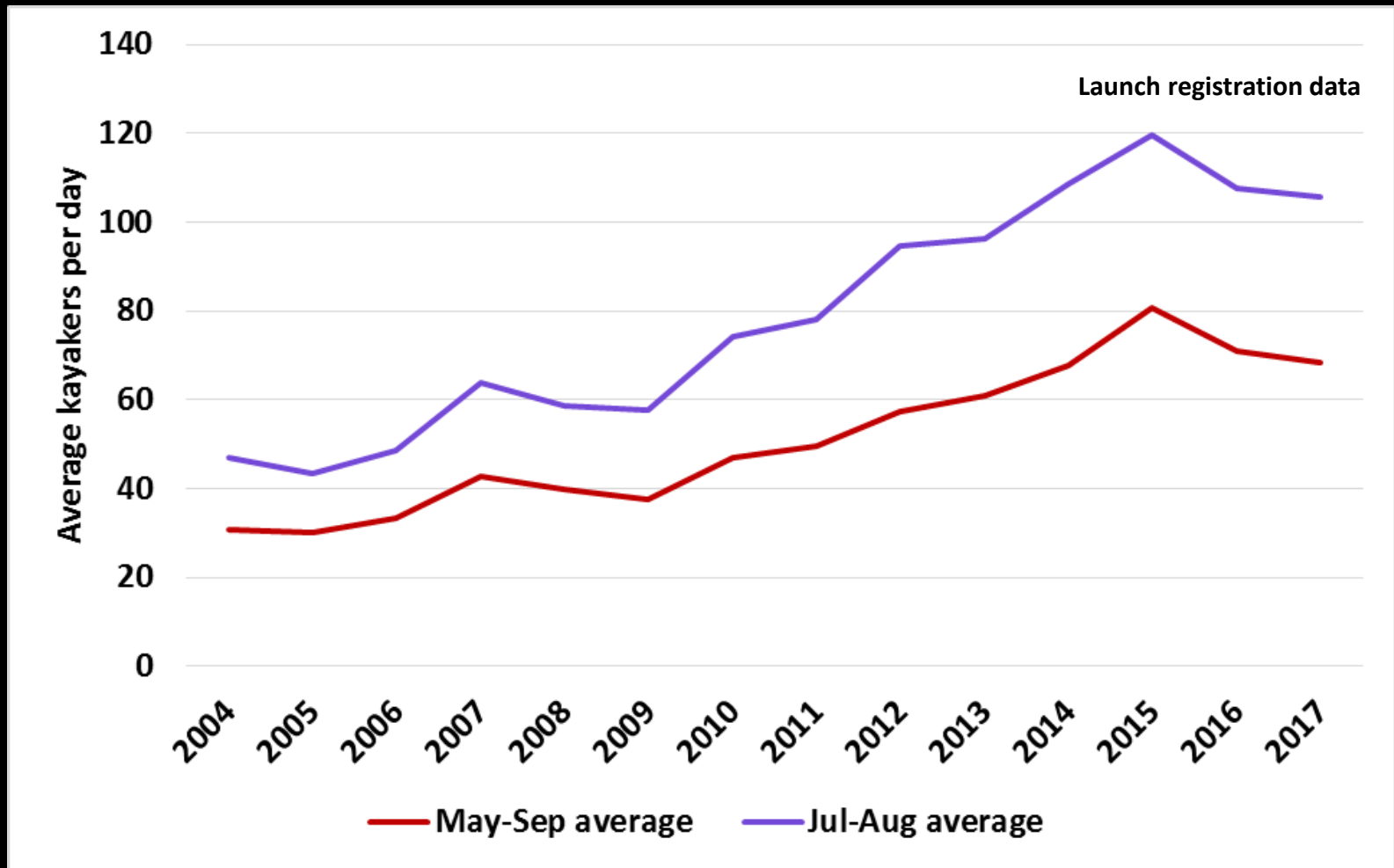
No – because...



SJ County Park commercial kayaks and people 2017



County Park kayaking from previous years



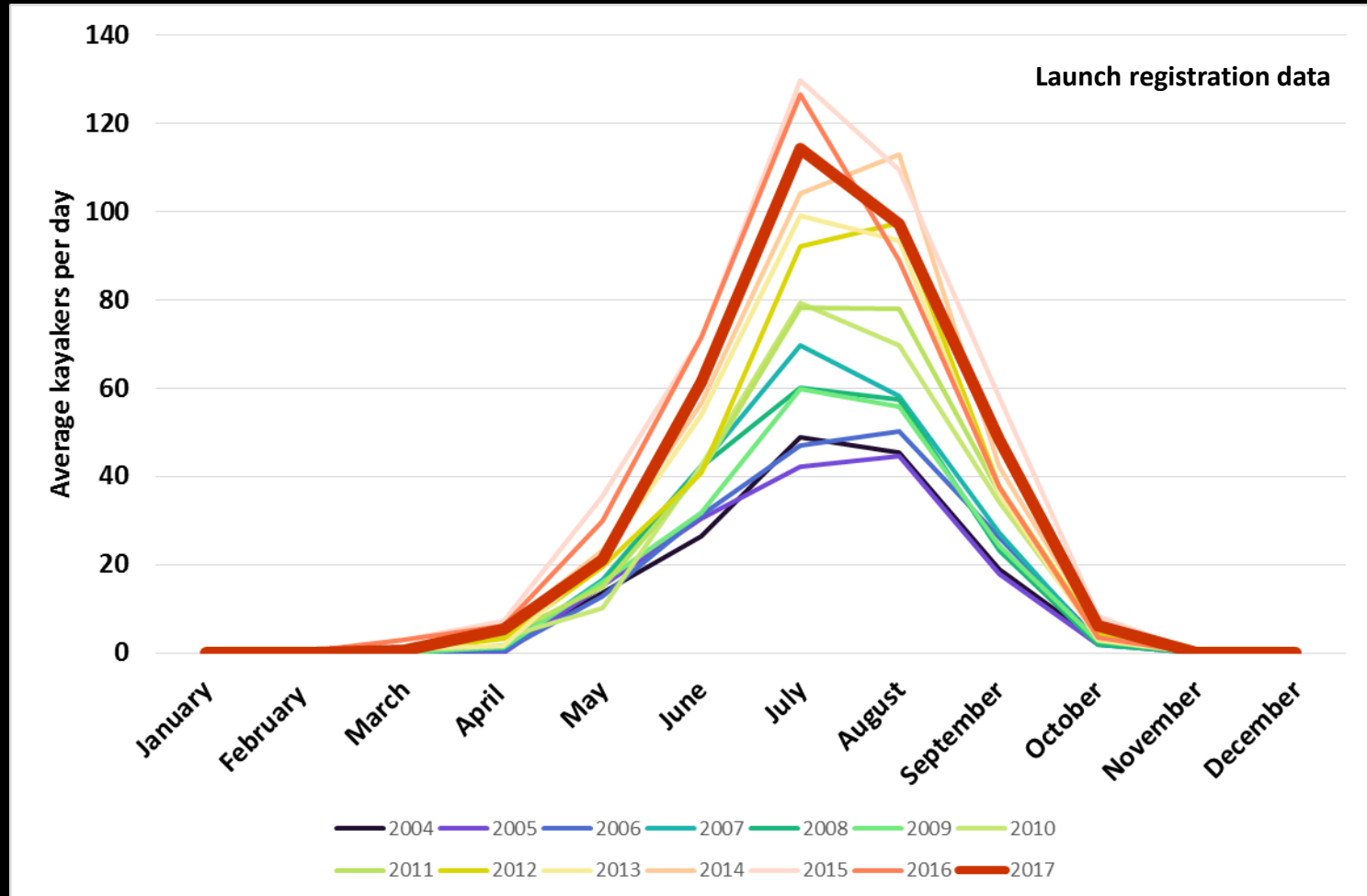
An aerial photograph of a park building with a red roof and a paved area. In the foreground, there is a gravel beach with many yellow and blue kayaks lined up. Several people are standing on the beach and near the kayaks. The background is a dense forest of evergreen trees.

County Park kayaking 2017

	Boats	People
May – Sep avg	38 per day	70
Max	98	189
Jul-Aug avg	56	104

Kayakers per trip has changed...
9-10 kayakers per trip before 2009
Dropping to 7 in recent years

County Park kayaking over the years



Adapted from Toby H. analysis