

San Juan Islands Visitor Studies

Presented to

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San Juan ISLANDS



Visitor Bureau marketing success



WELCOME TO THE OFFICIAL TRAVEL SITE

[Lopez Island](#) • [Orcas Island](#) • [San Juan Island/ Friday Harbor](#)

ORCAS ISLAND
LOPEZ ISLAND
SAN JUAN ISLAND

ABOUT THE ISLANDS

WHERE TO STAY

WHAT TO DO

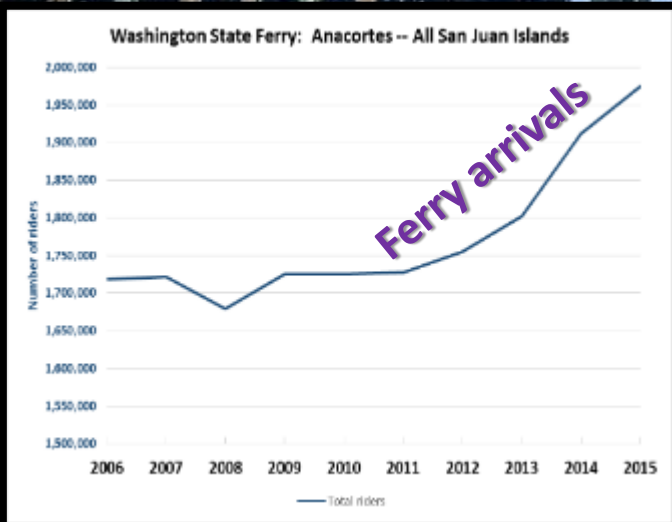
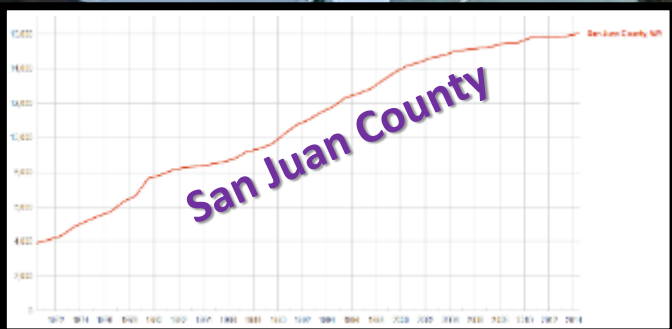
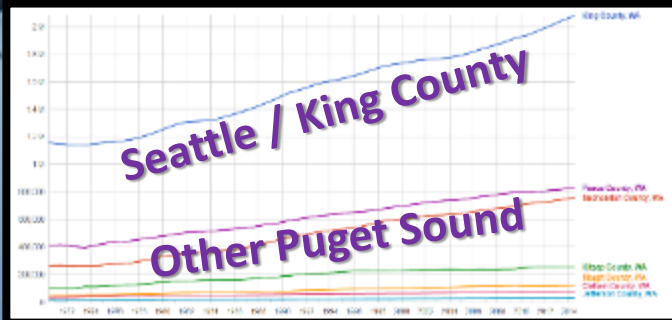


TripAdvisor 2015
TOP 10 BEST ISLANDS IN THE U.S.



Travel + Leisure 2016
TOP 5 ISLANDS CONTINENTAL U.S.

Increasing population and visitation



Resource impacts





Social impacts and crowding

Sustainable tourism
depends on...



High quality experiences



Good visitor management



- Match visitors with opportunities
- Keep impacts at acceptable levels
- Infrastructure handles peaks
- Don't encourage/invite more than you can handle

Terrestrial Managers Group Visitor Workshop/Assessment



Review existing information and needs
Identify issues and possible solutions

Workshop / Assessment Output



What do we know?

What do we need to know?

Who should collect data?



Overview of proposed visitor studies

Multiple agencies – interconnected data collection

Observations and counts
Onsite survey
Ferry survey
Accommodation inventory
Use statistics analysis

Agency roles

County lead...

- Onsite survey
- Ferry survey
- Accommodation inventory

NPS lead...

- Onsite observation / count data
- Ferry statistics / visitation analysis

Other agencies...

- March study design/fieldwork
- March TMG meeting
- May intern training



Onsite survey

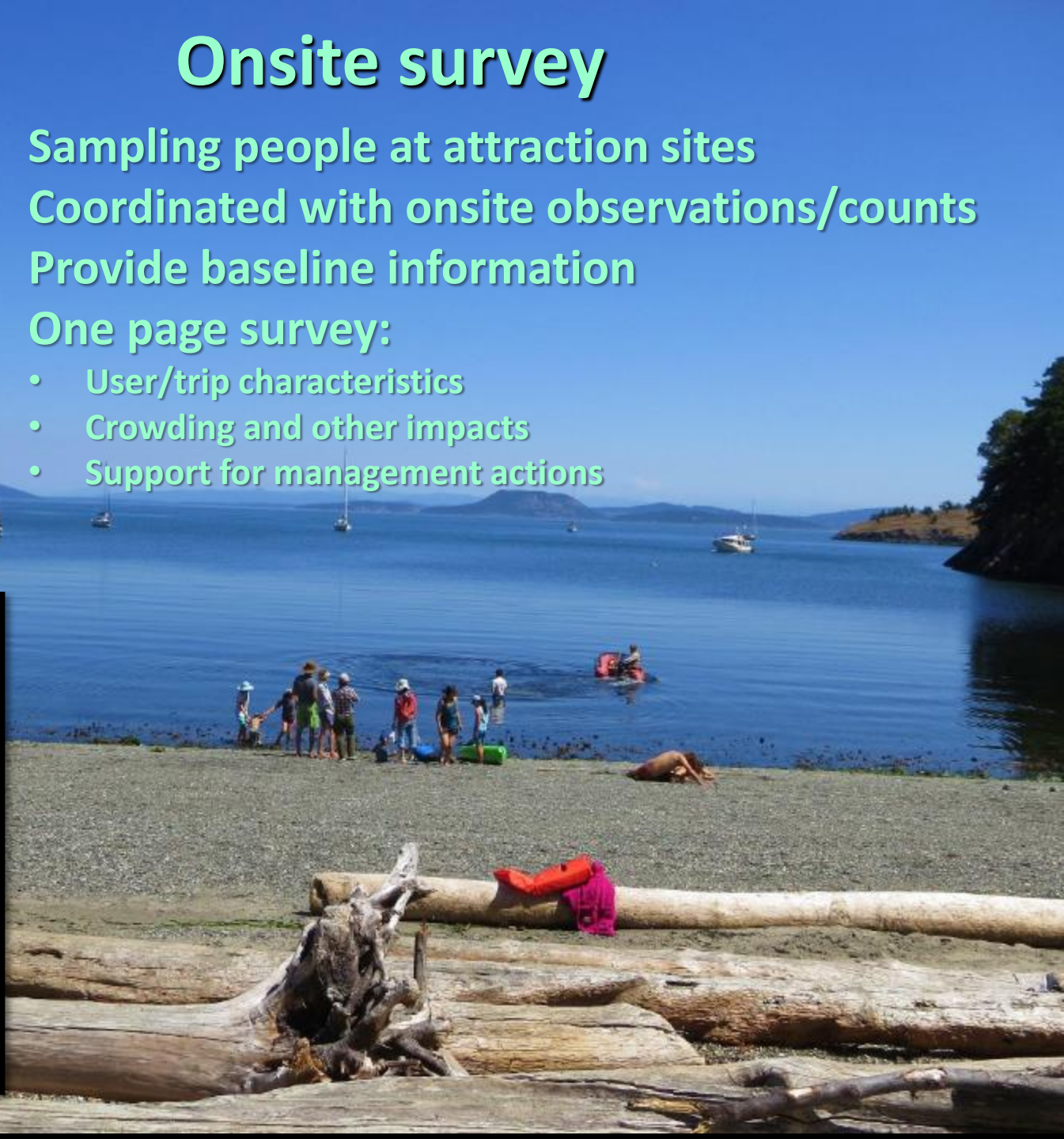
Sampling people at attraction sites

Coordinated with onsite observations/counts

Provide baseline information

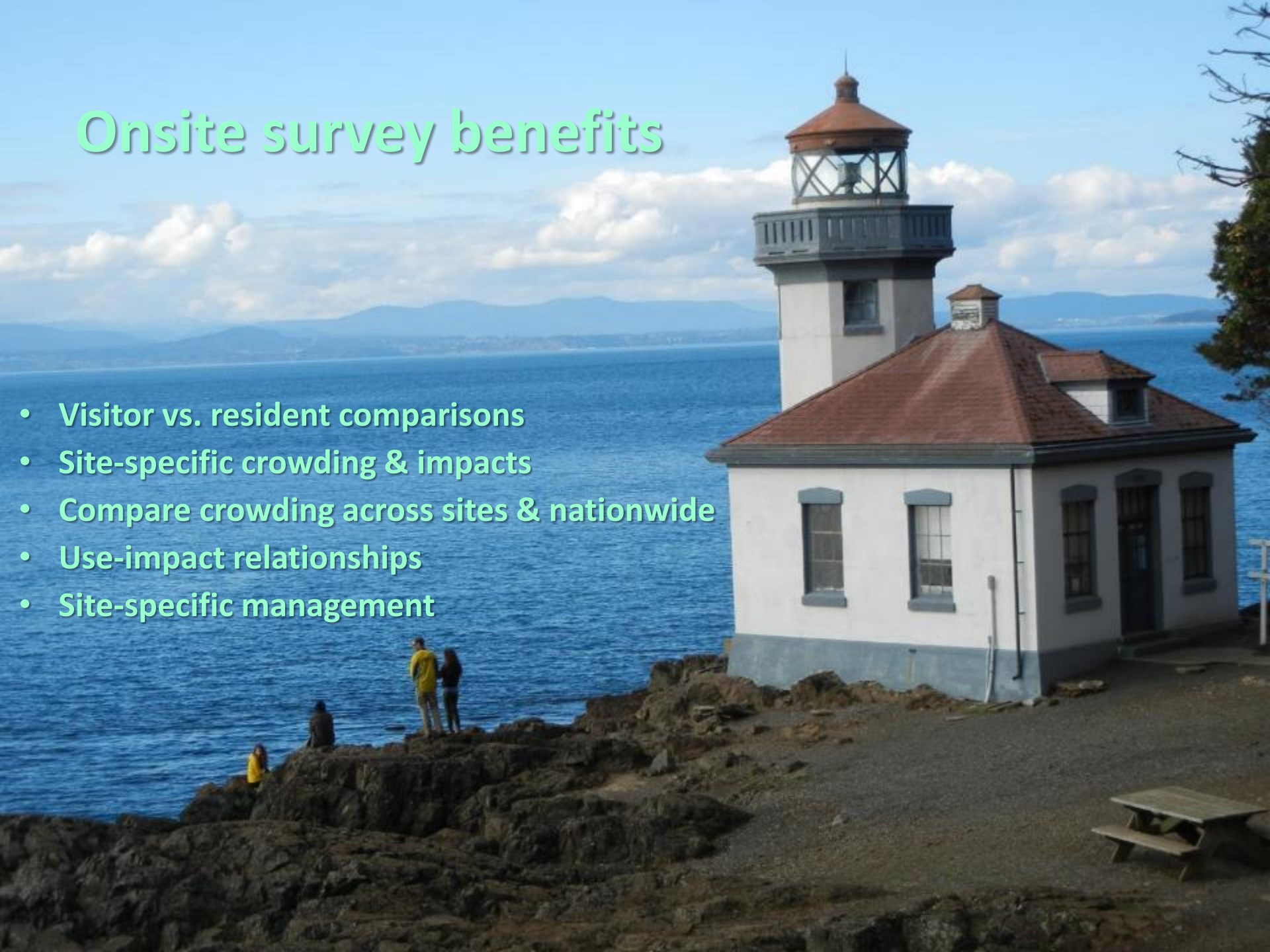
One page survey:

- User/trip characteristics
- Crowding and other impacts
- Support for management actions



Onsite survey benefits

- Visitor vs. resident comparisons
- Site-specific crowding & impacts
- Compare crowding across sites & nationwide
- Use-impact relationships
- Site-specific management



Ferry survey



Sampling of Anacortes-bound passengers

Longer than on-site survey

- Baseline information on ferry riders
- User/trip characteristics
- Activity participation and locations
- Photo evaluations of different use levels
- Support for management actions



Ferry survey benefits

Tourism planning/marketing

- Compare residents and visitors
- Accommodation and attraction preferences
- Facility evaluations and preferences

Visitor management

- Evaluate use levels at beaches and viewing areas
- Support for broader management strategies



Accommodation inventory



Baseline database
Multiple sources

Data by island, area, amenities, rooms, and pillows

Accommodation inventory benefits



Range of accommodation types
Compare inventory with...

- Average and peak visitation
- Ferry / airline capacity

Visitor studies

Baseline information
Management-specific
Benefits multiple agencies



Help implement...

- County Parks Plan
- Multi-agency Scenic Byway Plan

Help with on-going...

- NPS visitor center planning
- Tourism Master Plan
- BLM Monument Plan
- TMG cooperative actions
- County decisions on transit, affordable housing, VRBOs



Questions or comments?

