

San Juan Islands Visitor Study

Highlight preliminary findings
Ferry survey and accommodation inventory
January 2018

DRAFT

Ferry survey



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

631 visitors

114 residents

27 unknown or commercial

DRAFT

The San Juan Islands Experience

“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

DRAFT

Reasons visitors enjoy the San Juan Islands



-  Natural resource or public lands
-  Community social setting
-  Tourism infrastructure

DRAFT

Outdoor recreation participation

“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

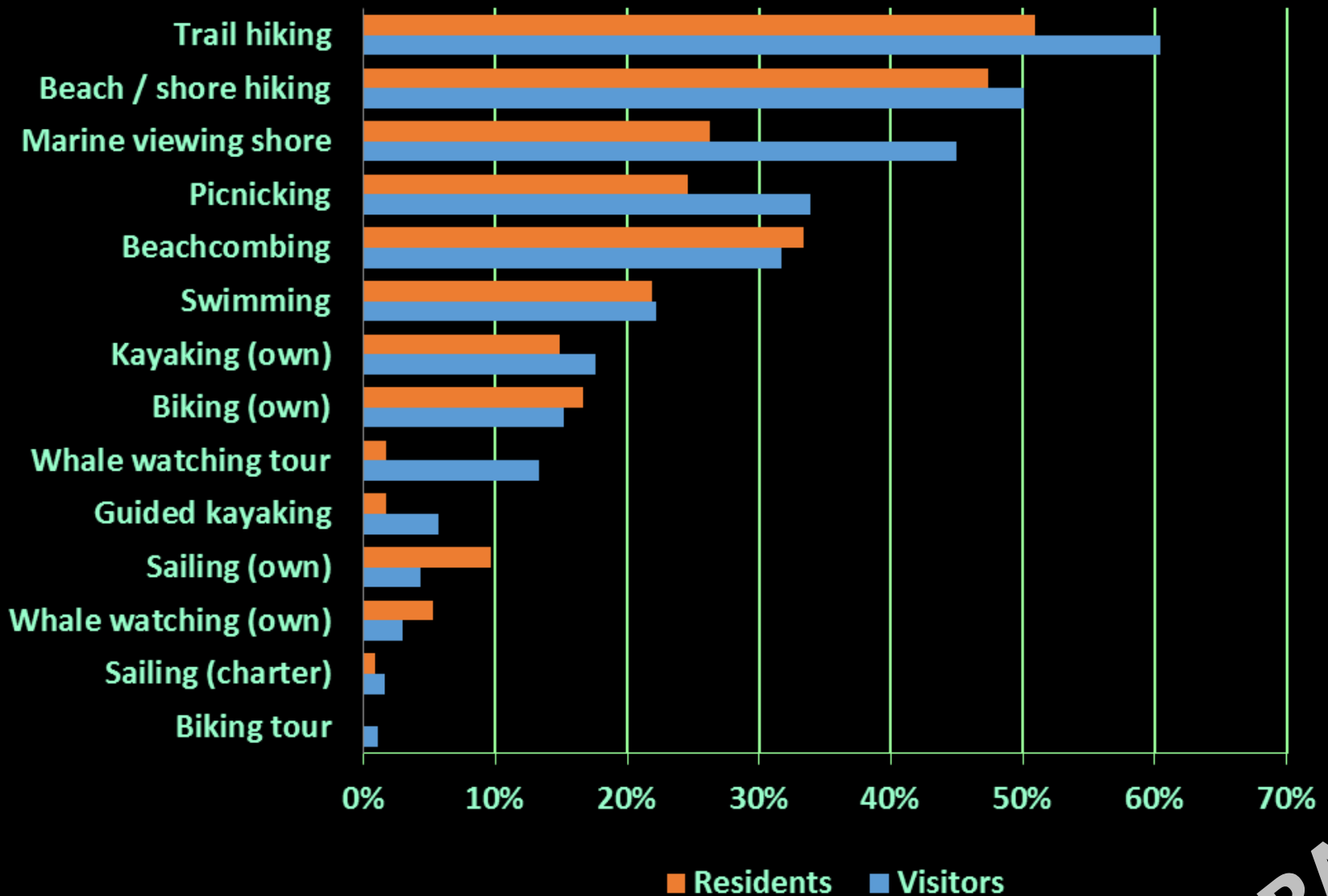
Etc.

14 activities listed on survey

Percent of visitors and residents who checked each shown on graph

DRAFT

Outdoor recreation participation rates



DRAFT

Crowding

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

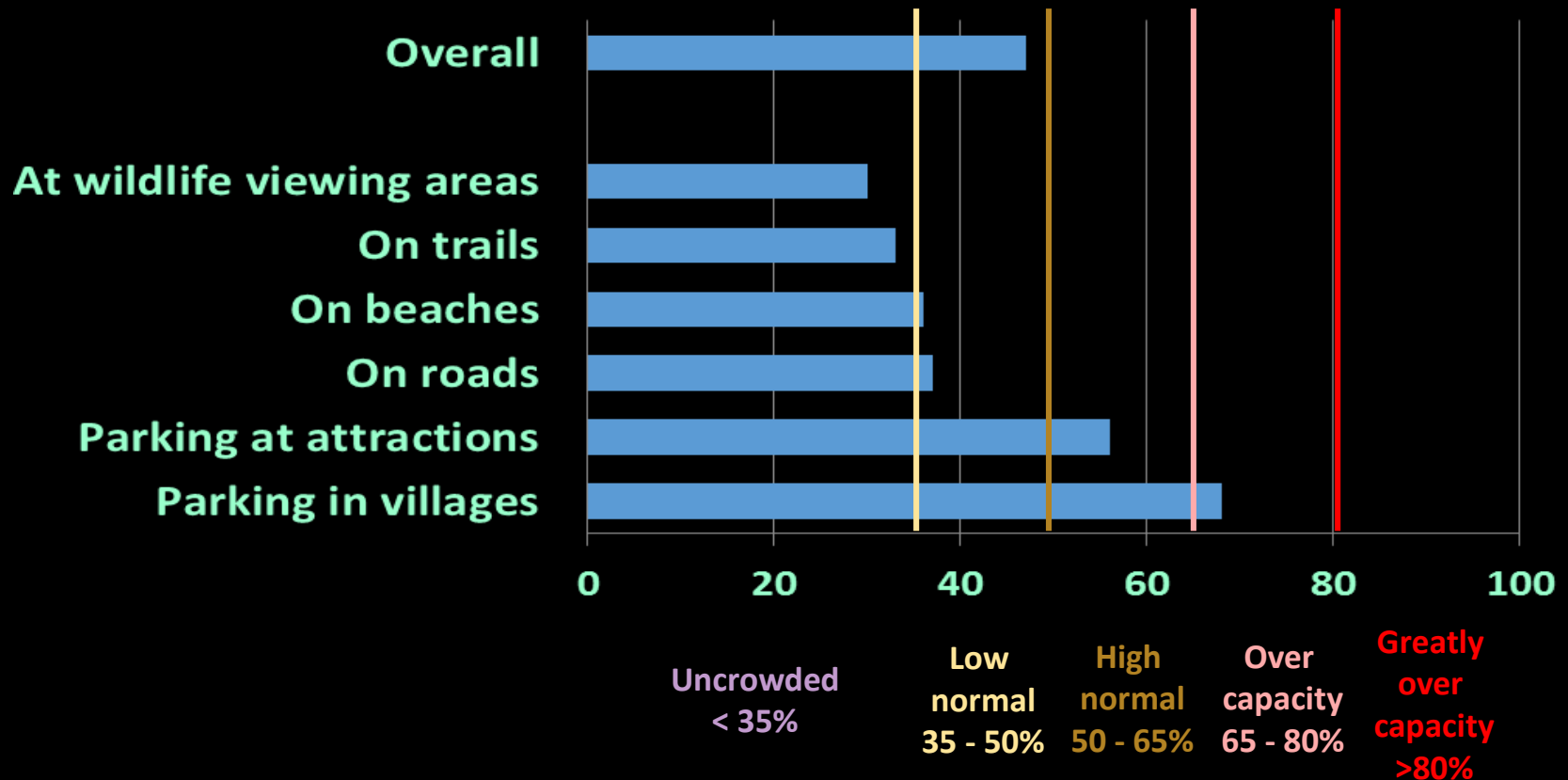
	Not at all crowded		Slightly crowded		Moderately crowded			Extremely crowded	
	1	2	3	4	5	6	7	8	9
Parking in villages									
Etc.									
Etc.									

**Percent reporting 3 or higher (some degree of crowding) for
all locations shown in following graph...**

“Rule of thumb” indicator of capacity...

DRAFT

Percent of visitors reporting 3 or higher on crowding scale



Where do visitors feel crowded?

- When parking their vehicles...especially in villages (over capacity)

Less crowding during activities

Interesting differences between islands – coming soon

DRAFT

Beach Photos

©CRC

Photo A



Photo B



Photo C



Photo D

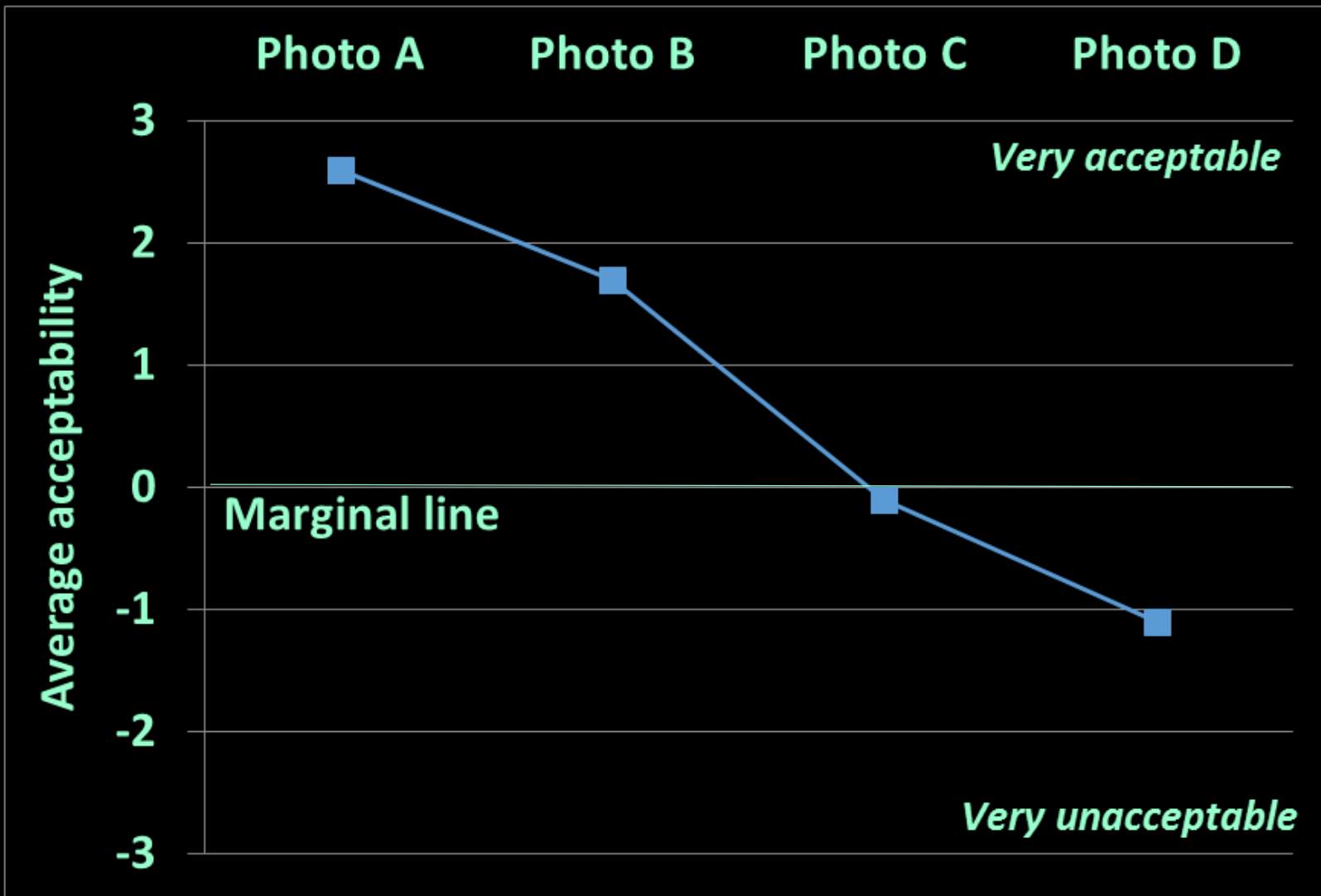


Evaluating use at beaches

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

DRAFT

Evaluating beach densities: All respondents



DRAFT

Evaluating beach/viewing area densities

Marine viewing evaluations showed similar patterns to beaches

For both beaches and marine viewing evaluations

- Differences between visitors and residents were small
- Differences between islands were small

DRAFT

Support for management actions

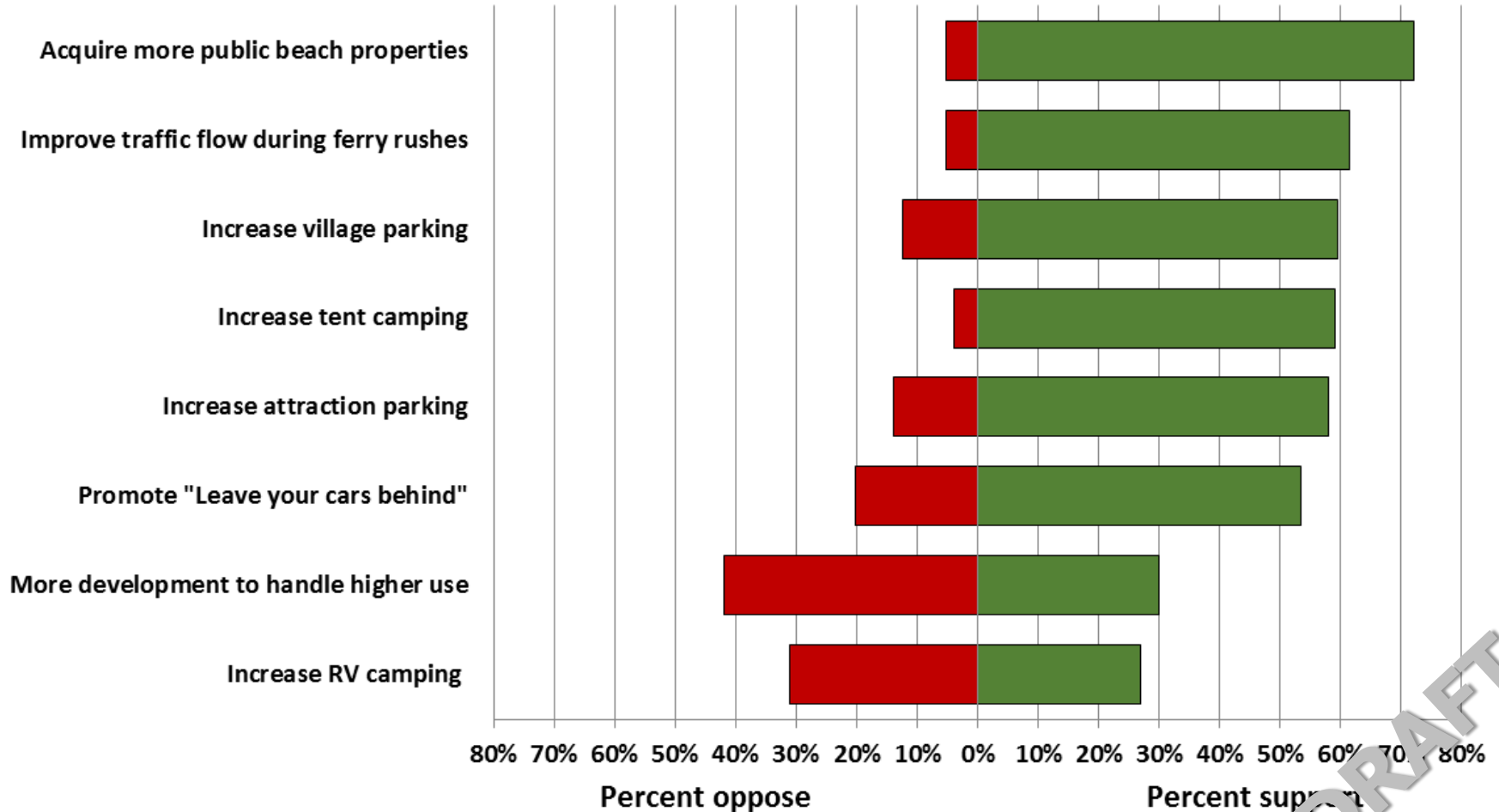
“Please tell us if you support or oppose the following actions that might be used to improve tourism in the San Juan Islands. If you support an action, identify whether it should be a low, medium, or high priority.”

Respondents were asked about 21 different actions...eight are shown on the following graph.

For simplicity, only support/oppose results are shown.

DRAFT

Support for management actions: All respondents



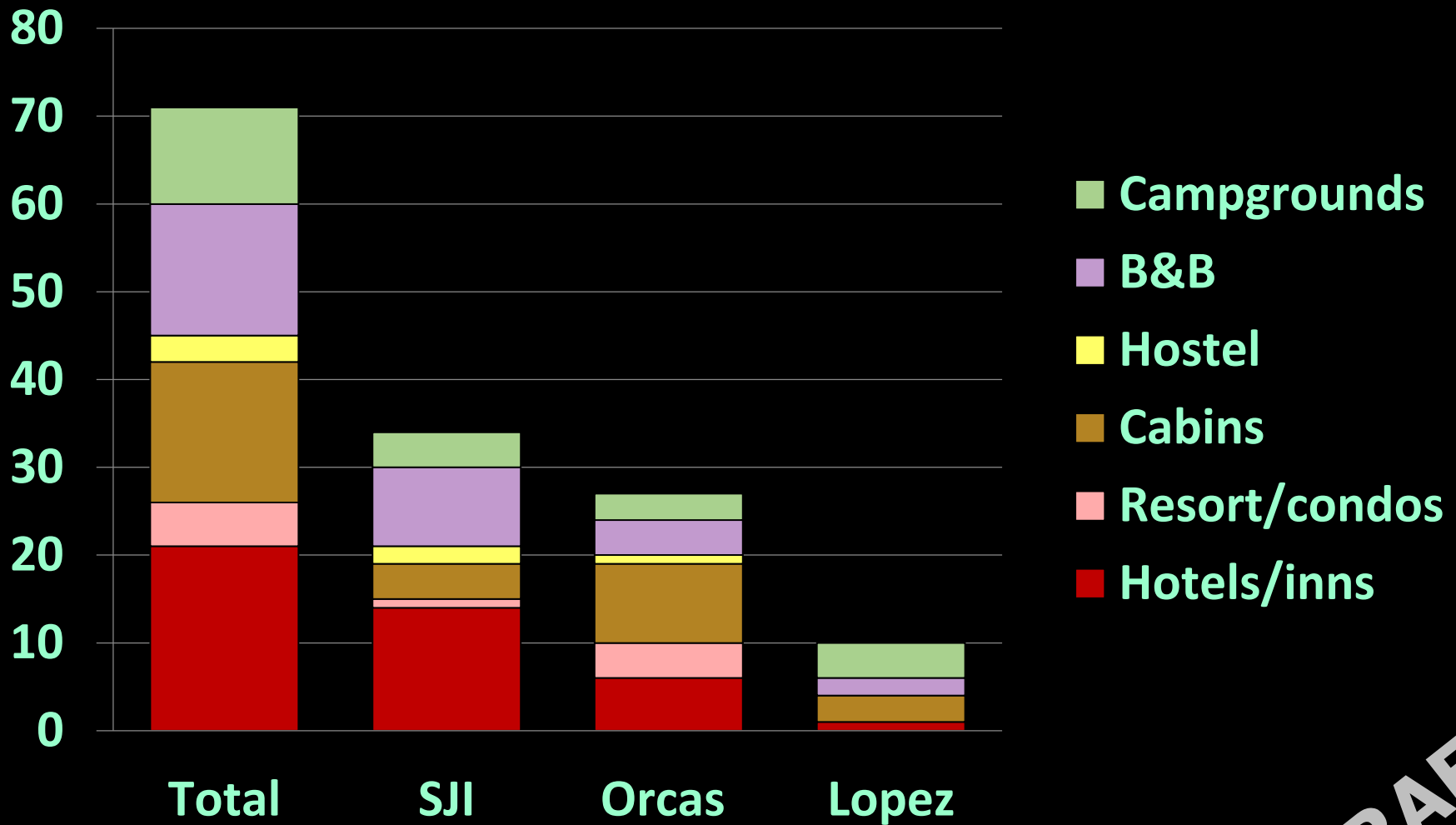
DRAFT

Accommodation inventory



Developing a baseline database
Some DBAET overview information below

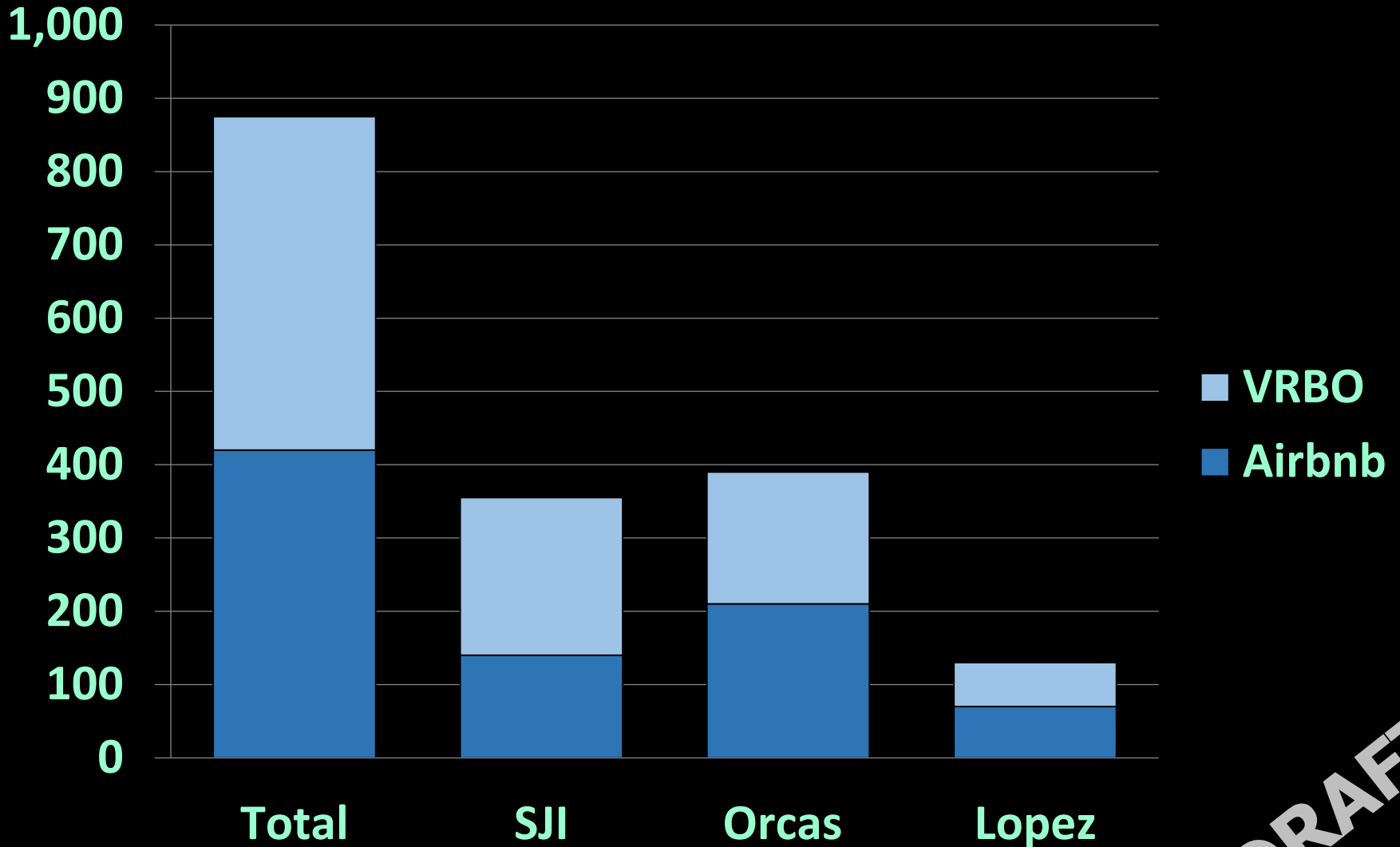
Number of accommodation “operations” (not including VRBO/Airbnb rentals)



DRAFT

Number of VRBO/Airbnb rentals

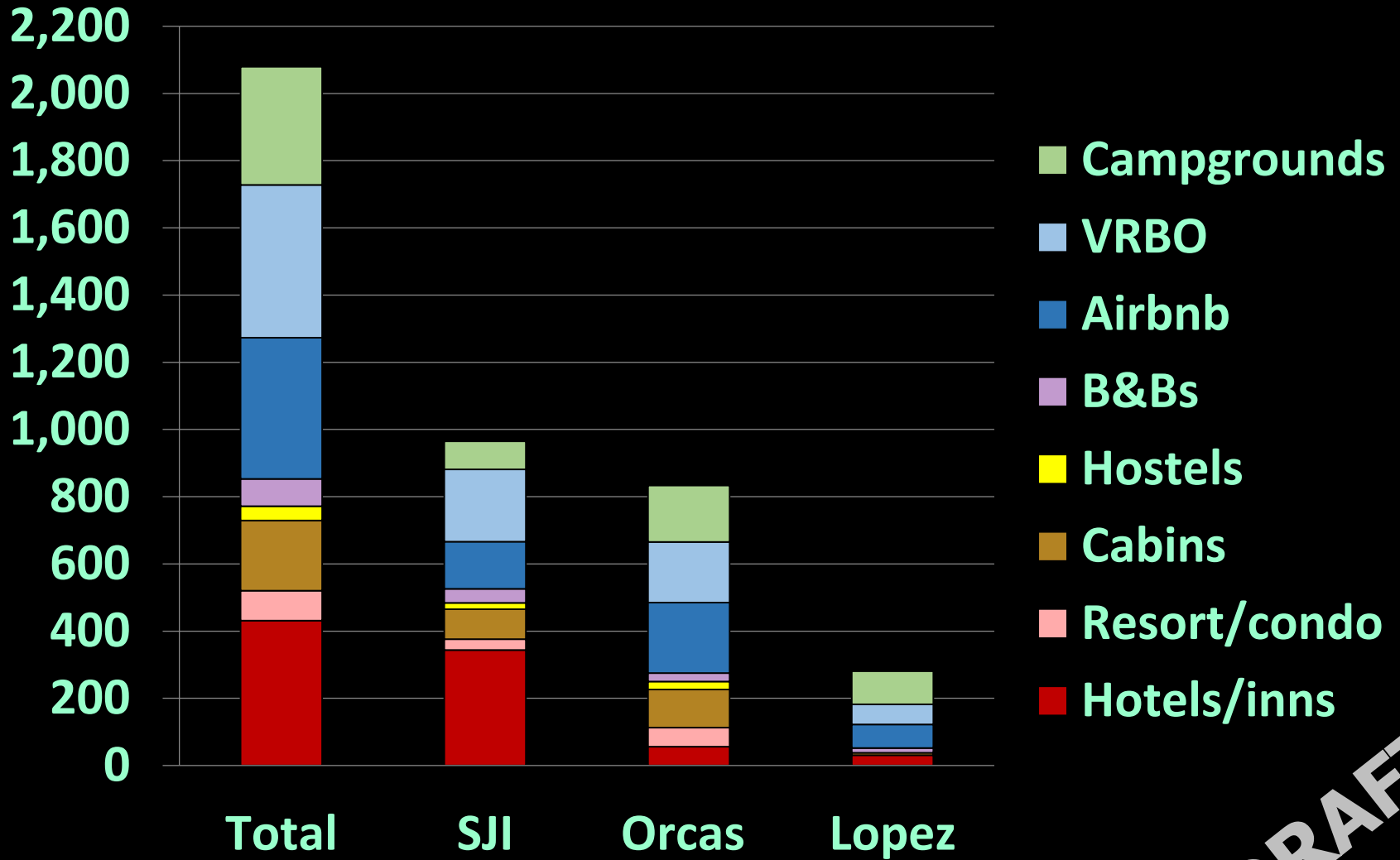
(Does not include Friday Harbor)



DRAFT

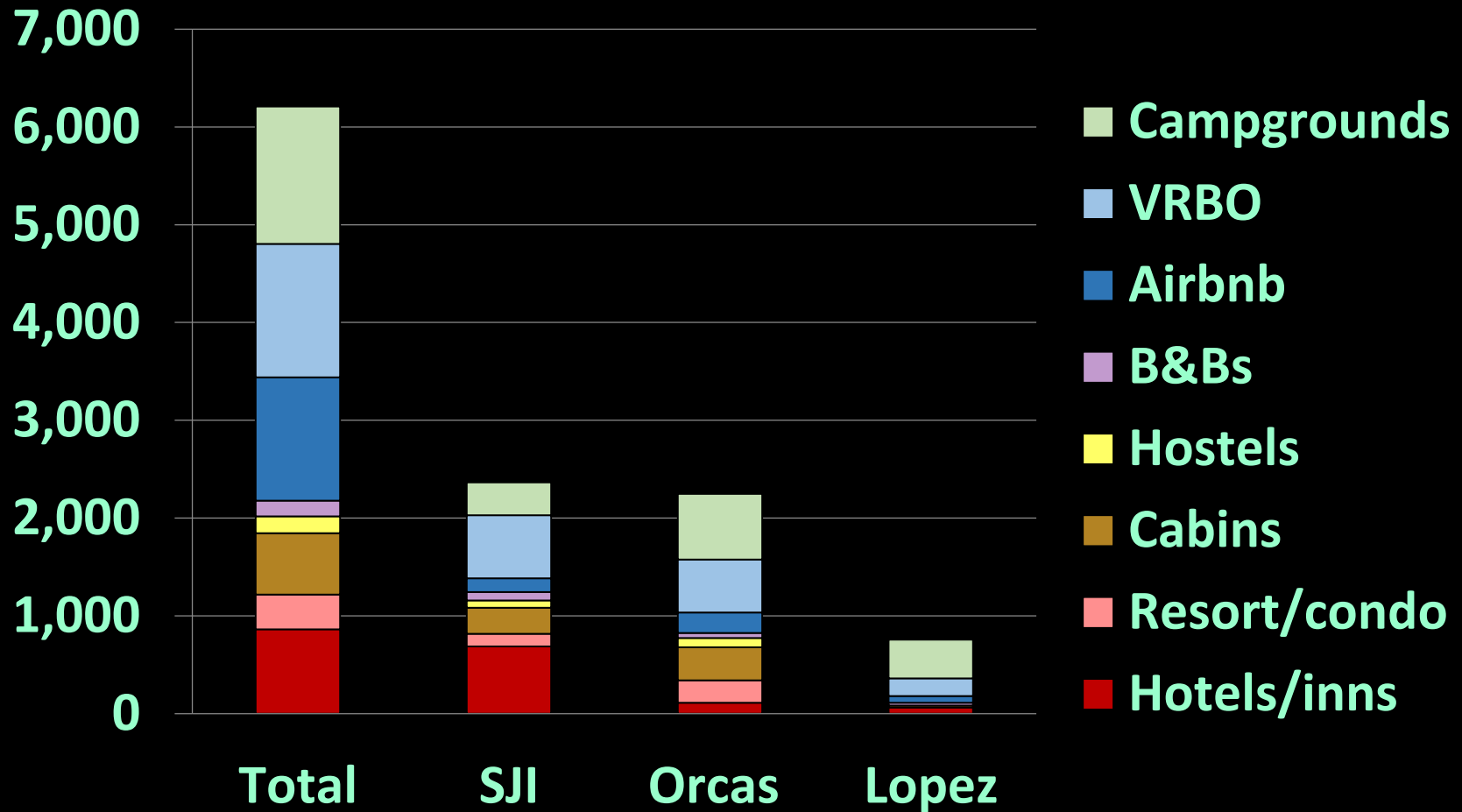
Number of accommodation units

Rooms / bedrooms / campsites



DRAFT

Estimated average overnight visitors (if all units were occupied)



Assumes 2 people per hotel unit, 4 per condo, 3 per cabin, 4 per hostel room, 2 per BB bedroom, 3 per transient rental unit, and 4 per campsite

DRAFT

Next Steps

Feb. 2018 - pre-meeting information

**Week of Feb. 26 2018 - public meetings,
stakeholder workshop**

March 2018 - written report



Questions or comments

