

Findings from the San Juan Islands Visitor Study for Lopez Island

Presented on Tuesday, February 27th
at Grace Episcopal Church in Lopez Village, WA




Confluence Research and Consulting

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San Juan Islands Visitor Study

Lopez Special Edition
February 27, 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



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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



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

3. Site counts



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

4. Onsite survey

Lopez n = 497

One page

Shark Reef

Watmough

Spencer Spit

Odlin Park

Agate Beach/Iceberg Point

Otis Perkins/Tombolo

Sampling

- Late May through Labor Day
- More in mid-summer (74% Jul-Aug)
- Morning through Later afternoon
- More in afternoon (66% after 2 pm)

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5. Ferry survey



San Juan Islands Study • Ferry Survey

Please you visited

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

Days on San Juan Islands	Days on Orcas Island	Days on Lopez Island
<input type="checkbox"/> Jackson Beach in Friday Harbor	<input type="checkbox"/> Deer Harbor	<input type="checkbox"/> Light House / Ferry landing
<input type="checkbox"/> Fourth of July Beach and trails	<input type="checkbox"/> Timberack Mountain Preserve	<input type="checkbox"/> Cedar County Park
<input type="checkbox"/> American Camp Visitor Center & buildings	<input type="checkbox"/> North Beach Shore Access	<input type="checkbox"/> Fishermen Spit
<input type="checkbox"/> South Beach	<input type="checkbox"/> Westport Park in Eastwood	<input type="checkbox"/> Hammer Linn
<input type="checkbox"/> Castle Point Lighthouse / beaches	<input type="checkbox"/> Crescent Beach Preserve	<input type="checkbox"/> Lopez Hill trails
<input type="checkbox"/> Eagle Cove	<input type="checkbox"/> Judd Cove Preserve	<input type="checkbox"/> Shalk Reef Sanctuary
<input type="checkbox"/> Historical Scenic Preserve overlooks	<input type="checkbox"/> Cascade Lake in Moran State Park	<input type="checkbox"/> State Beach Sanctuary
<input type="checkbox"/> Line 4th State Park / Ullrich State Park	<input type="checkbox"/> All Constitution in Moran State Park	<input type="checkbox"/> Adams County Park
<input type="checkbox"/> County Park / Small Fox Cove	<input type="checkbox"/> Hanging trails in Moran State Park	<input type="checkbox"/> Veterans Park
<input type="checkbox"/> Michael Hill trails	<input type="checkbox"/> Observation Pass State Park	<input type="checkbox"/> Washington Bay
<input type="checkbox"/> Hanging Hill trails	<input type="checkbox"/> Other _____	<input type="checkbox"/> Cowles Point
<input type="checkbox"/> English Camp gardens and buildings	<input type="checkbox"/> Other _____	<input type="checkbox"/> Spencer Spit State Park
<input type="checkbox"/> Roche Harbor trails		<input type="checkbox"/> Other _____
<input type="checkbox"/> Reuben Tarte County Park		
<input type="checkbox"/> Other _____		

Outdoor recreation activities

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

<input type="checkbox"/> Hiking on trails	<input type="checkbox"/> Hiking along beaches or nature shorelands
<input type="checkbox"/> Kayaking / canoeing	<input type="checkbox"/> Bicycling with a tow group
<input type="checkbox"/> Canoeing / paddling (with a guide)	<input type="checkbox"/> Beachcombing
<input type="checkbox"/> Canoe watching / sightseeing from boat	<input type="checkbox"/> Fishing
<input type="checkbox"/> Canoe watching / sightseeing from a private boat	<input type="checkbox"/> Swimming
<input type="checkbox"/> Canoe watching / sightseeing from a charter	<input type="checkbox"/> Other _____
<input type="checkbox"/> Canoe watching / sightseeing from a private boat	
<input type="checkbox"/> Canoe watching / sightseeing from a charter	

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

<input type="checkbox"/> Yes - and my reservation was for my first choice date and time	<input type="checkbox"/> No - because I don't know about the reservation system
<input type="checkbox"/> Yes - and my reservation was for my first choice date, but at a different time	<input type="checkbox"/> No - because my schedule was uncertain
<input type="checkbox"/> Yes - and my reservation was for a different date than my first choice	<input type="checkbox"/> No - because I have been asked to appear on this ferry
	<input type="checkbox"/> Other _____

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

631 visitors

141 residents/other

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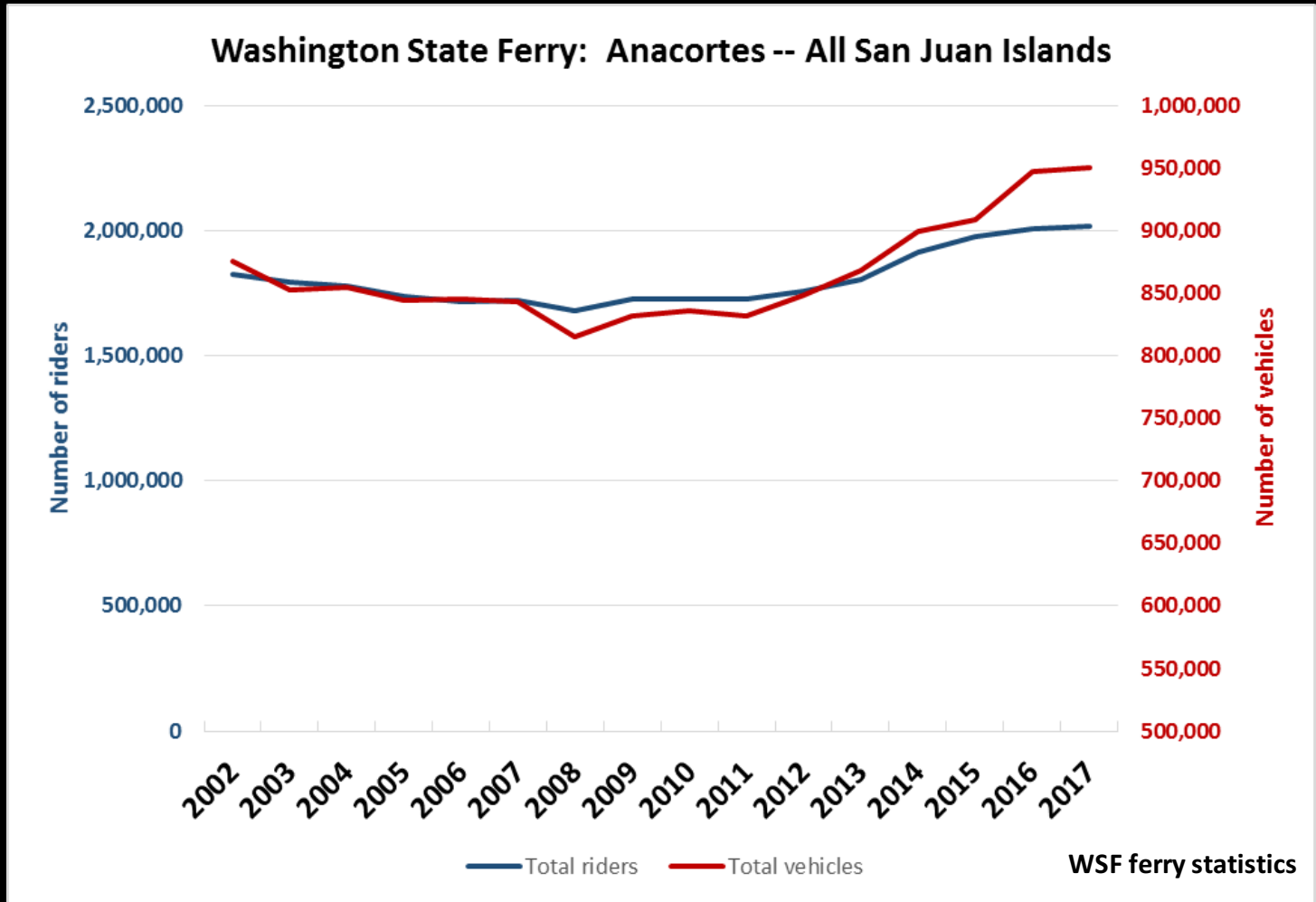
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Getting to the islands

WSF stats , web-information, & interviews

Long term year-round WSF trends – all islands

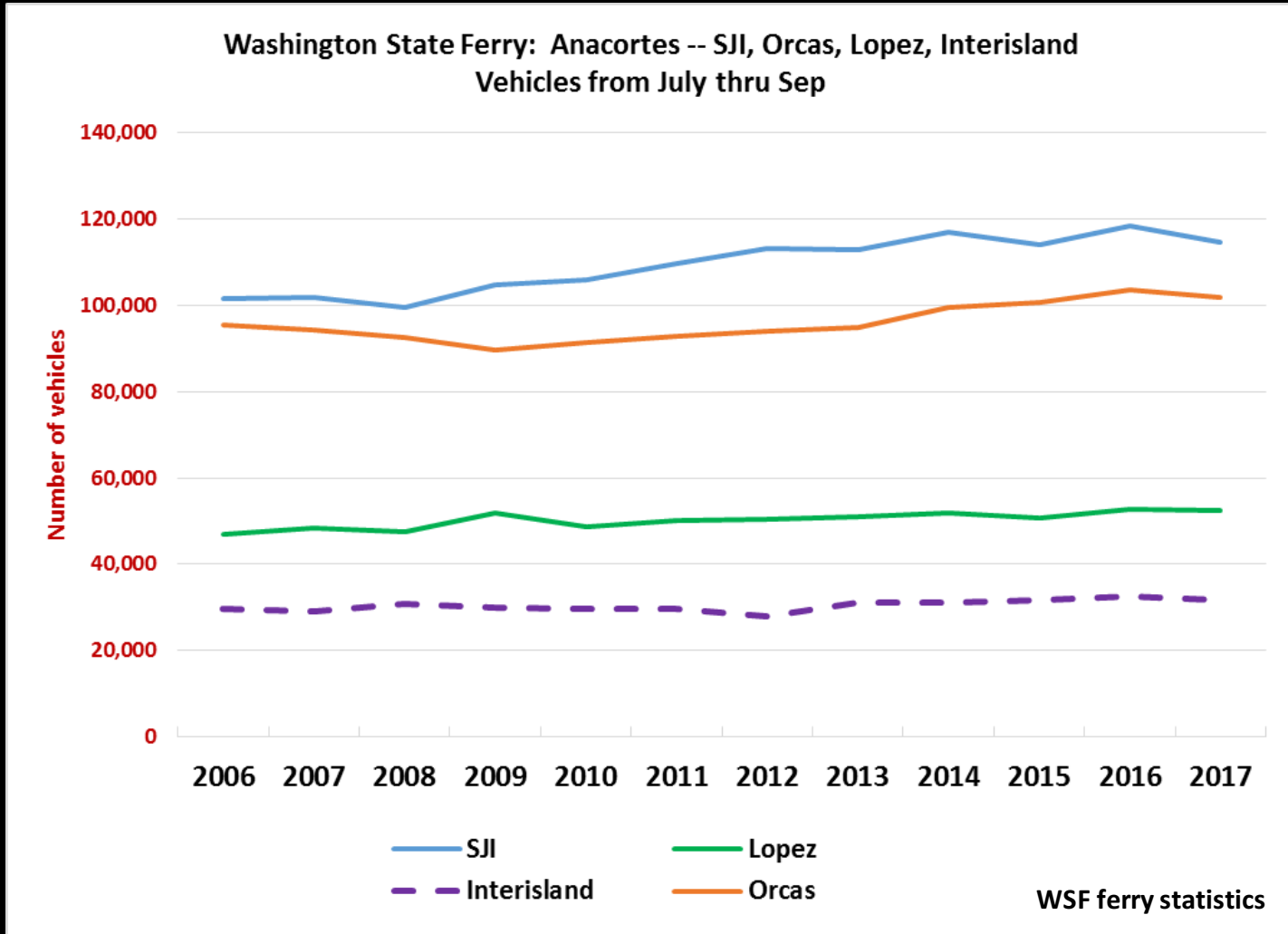
Riders and vehicles



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

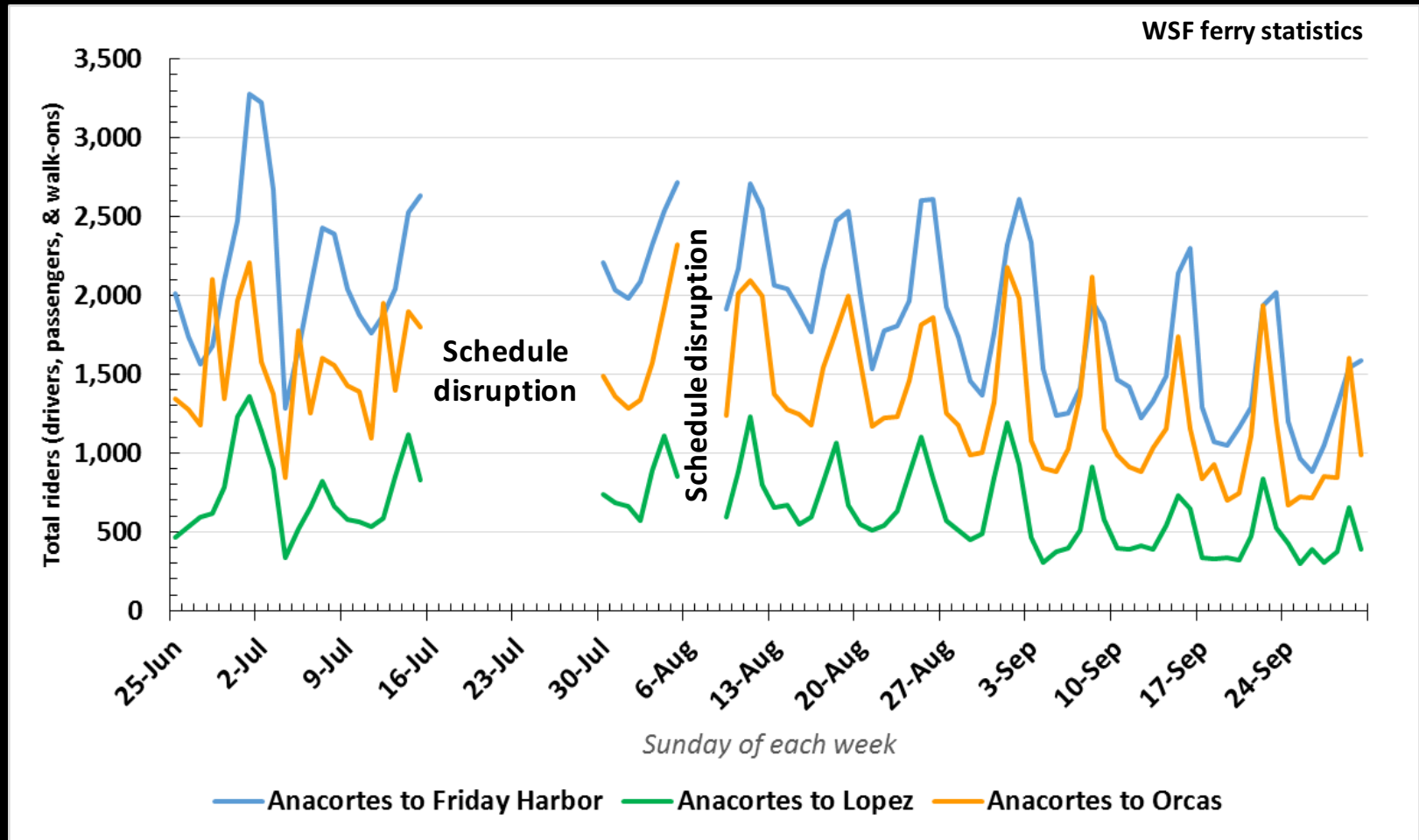
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Long term summer WSF vehicle trends by islands



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

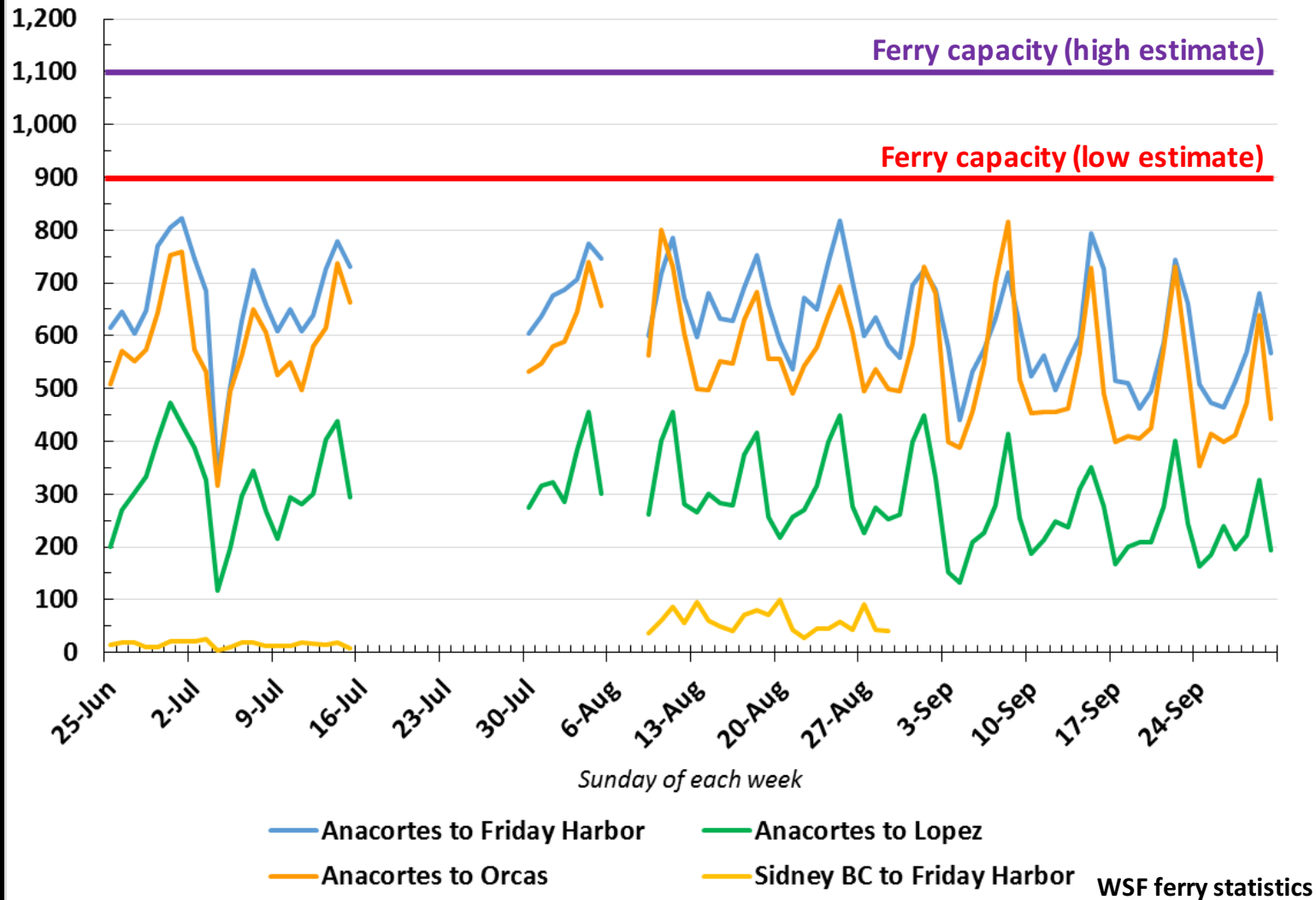
Per day capacity: ~800 to 1,000

Lopez –

- 5 direct from Anacortes + 2 to 3 with

Per day capacity: ~500 to 700

Vehicles per day by island 2017

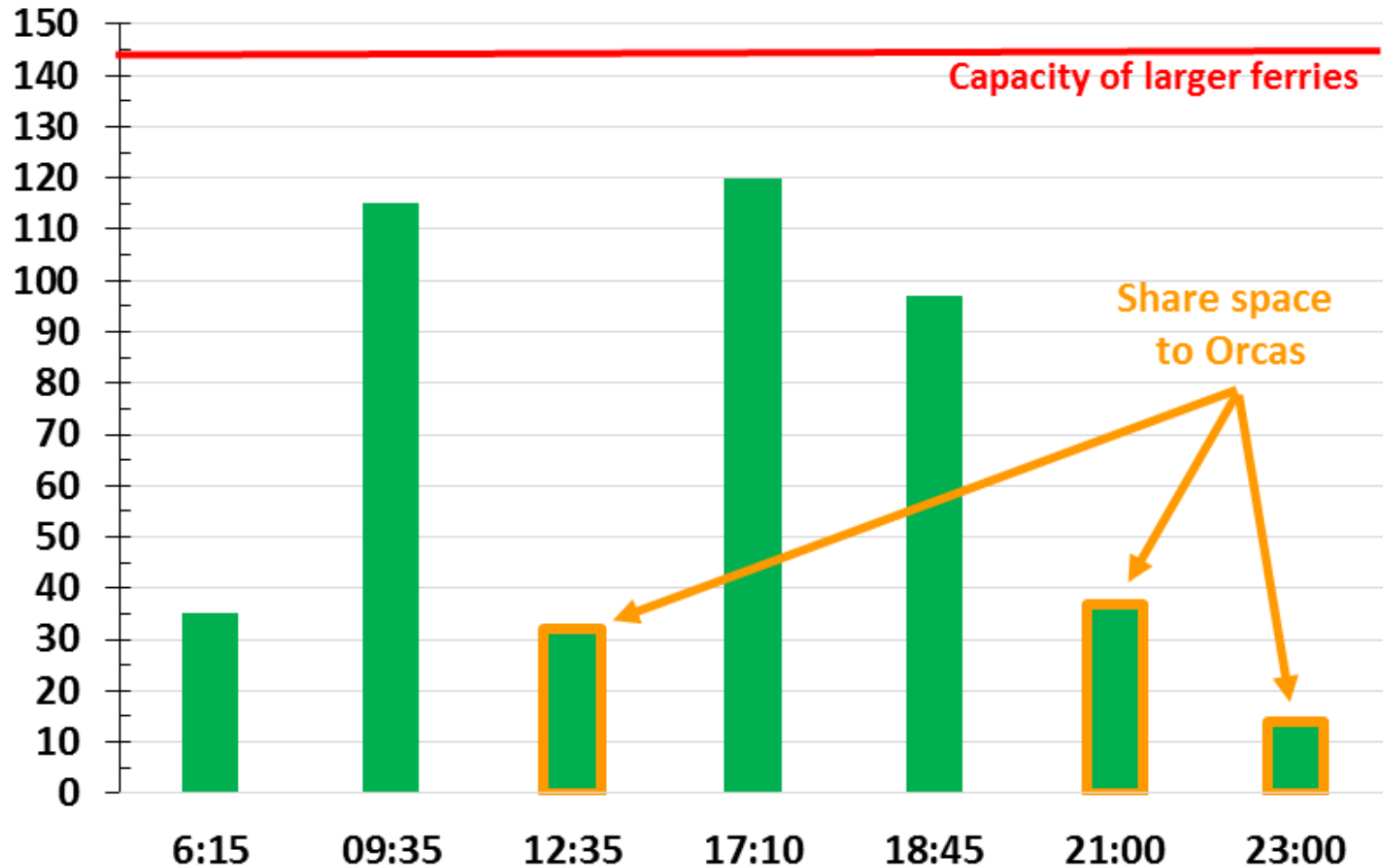


San Juan and Orcas > Lopez
Consistent weekend peak pattern
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Space for vehicles even on busy days

WSF ferry statistics

Lopez vehicles on Fri Sep 2 (Labor Day weekend)



People per vehicle on ferries

Summer 2017 (without walk-ons)



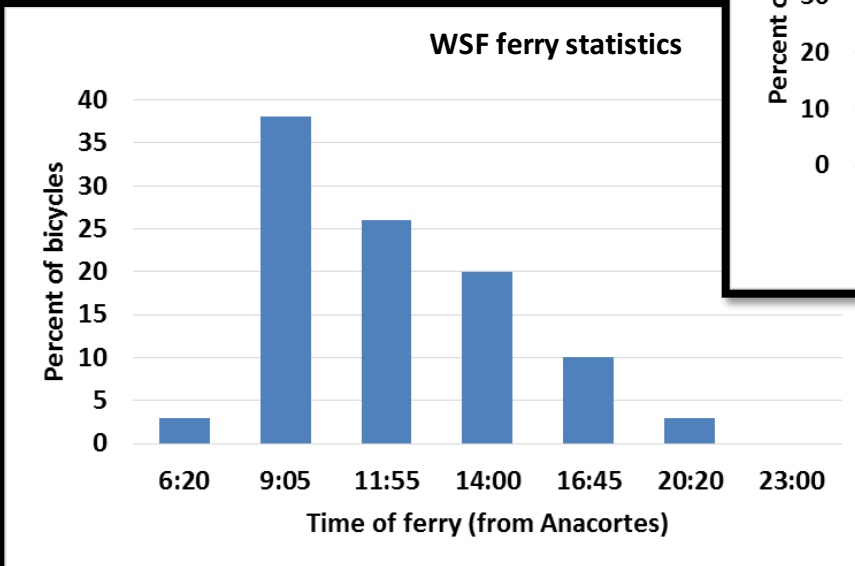
San Juan	2.1
Orcas	2.3
Lopez	1.8

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

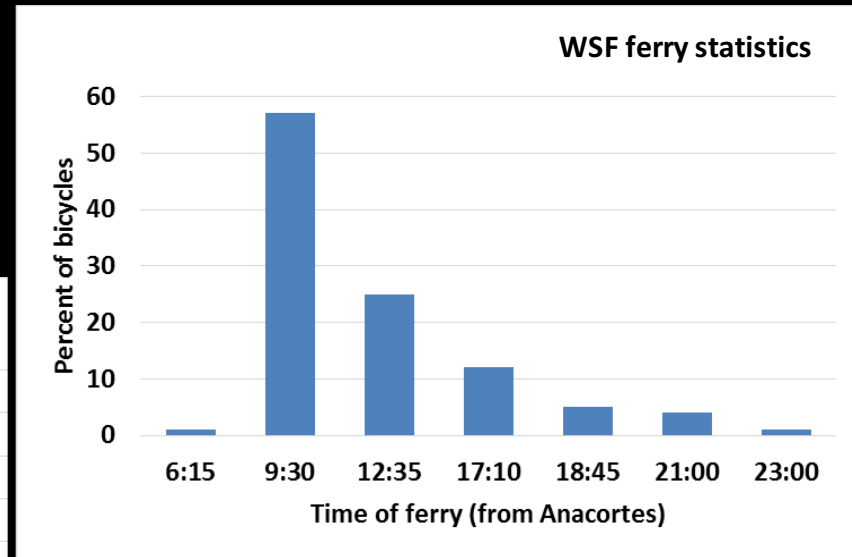
In winter/shoulder, fewer people per vehicle – more visitors with filled cars in summer

Ride-on bicycles: Percent by time of day

Anacortes → Friday Harbor

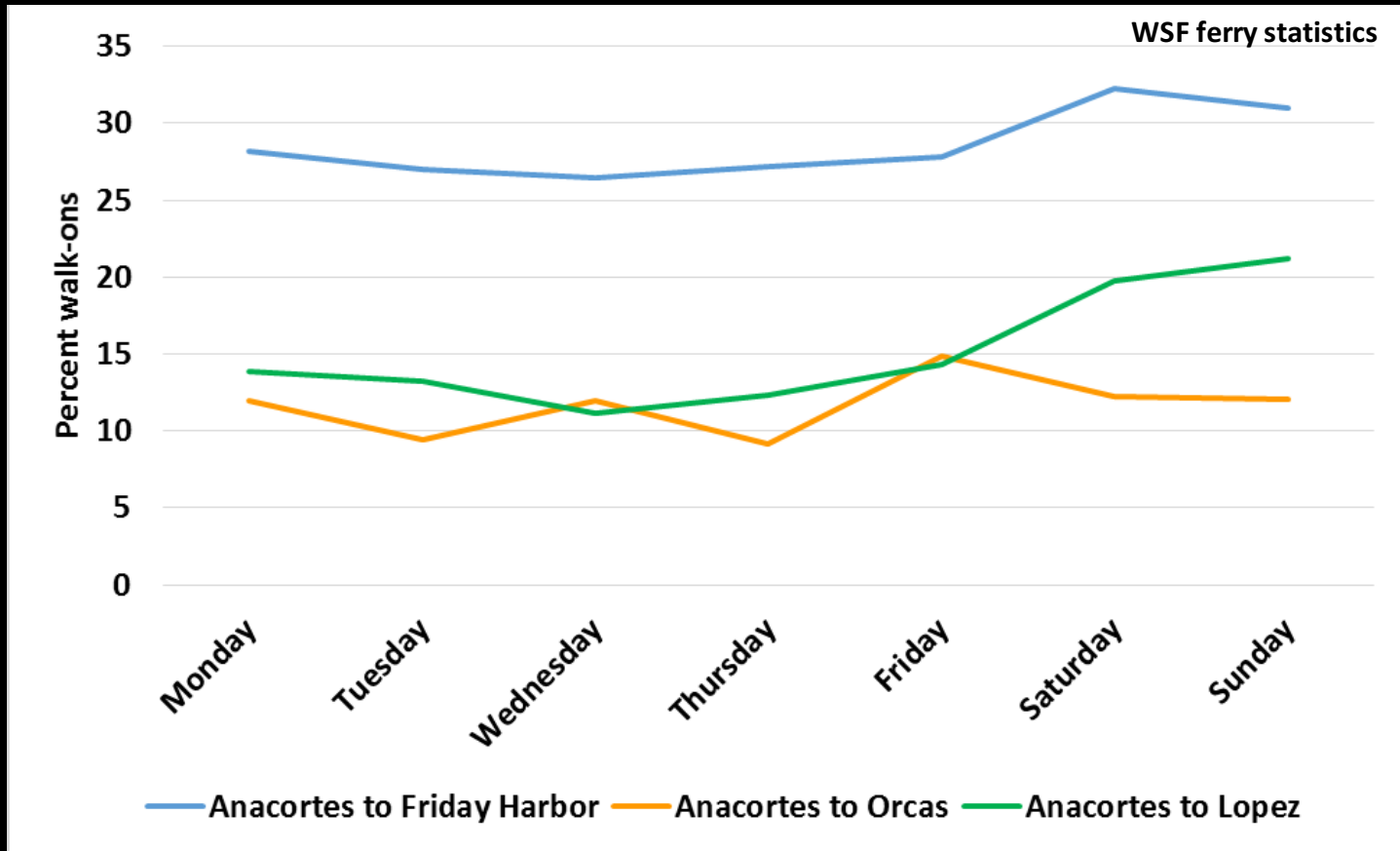


Anacortes → Lopez



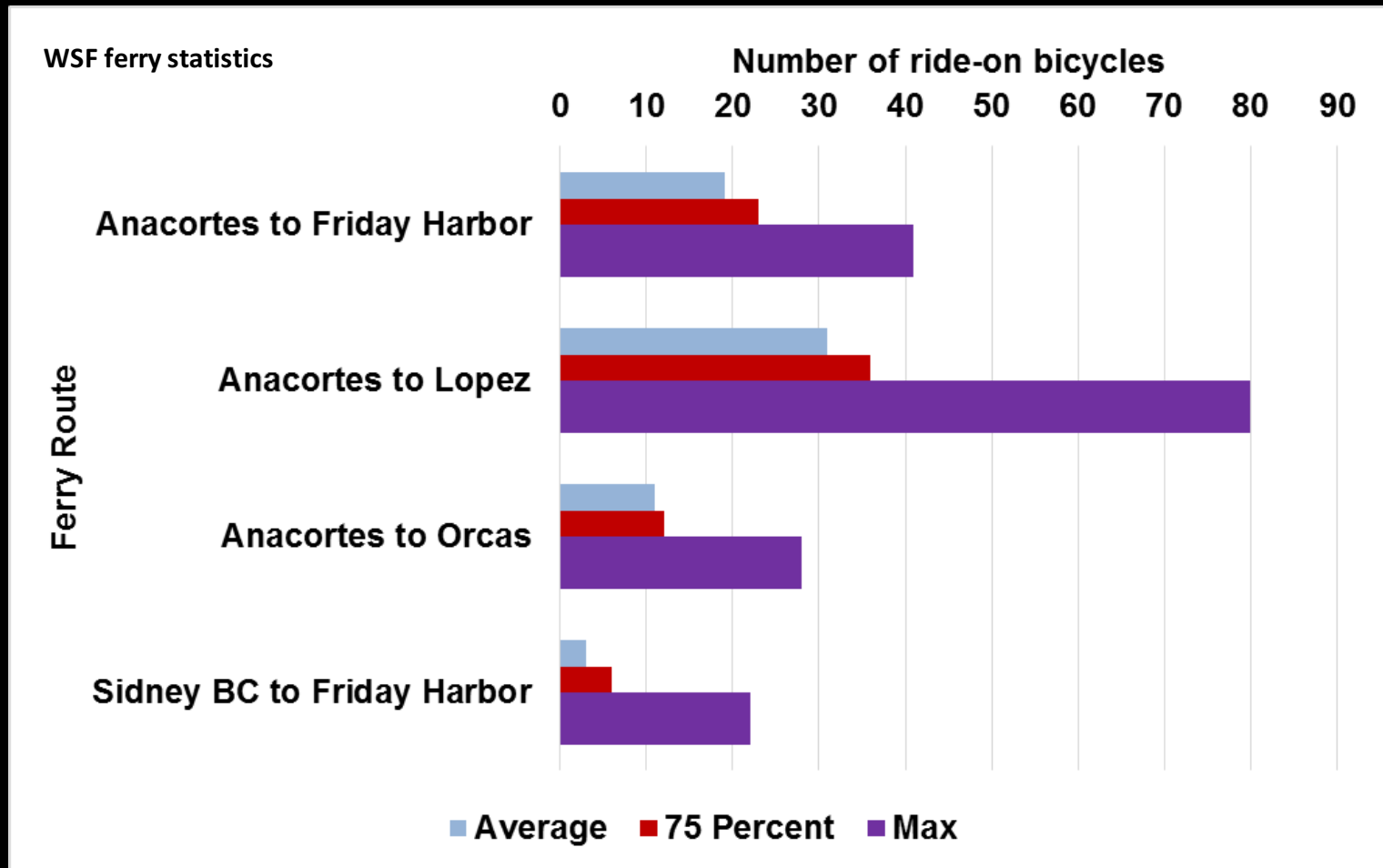
2nd morning ferry is most popular; declining numbers through day
With no constraints on reservations – cyclists have their choice of sailings

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?
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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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Airlines and private planes

150 to 250 pax per day San Juan

50 to 80 pax per day Orcas

10 to 30 pax per day Lopez



Other passenger ferries



Rough estimate of <150 per day

Cruise ships

Infrequent day landings
<100 ppd

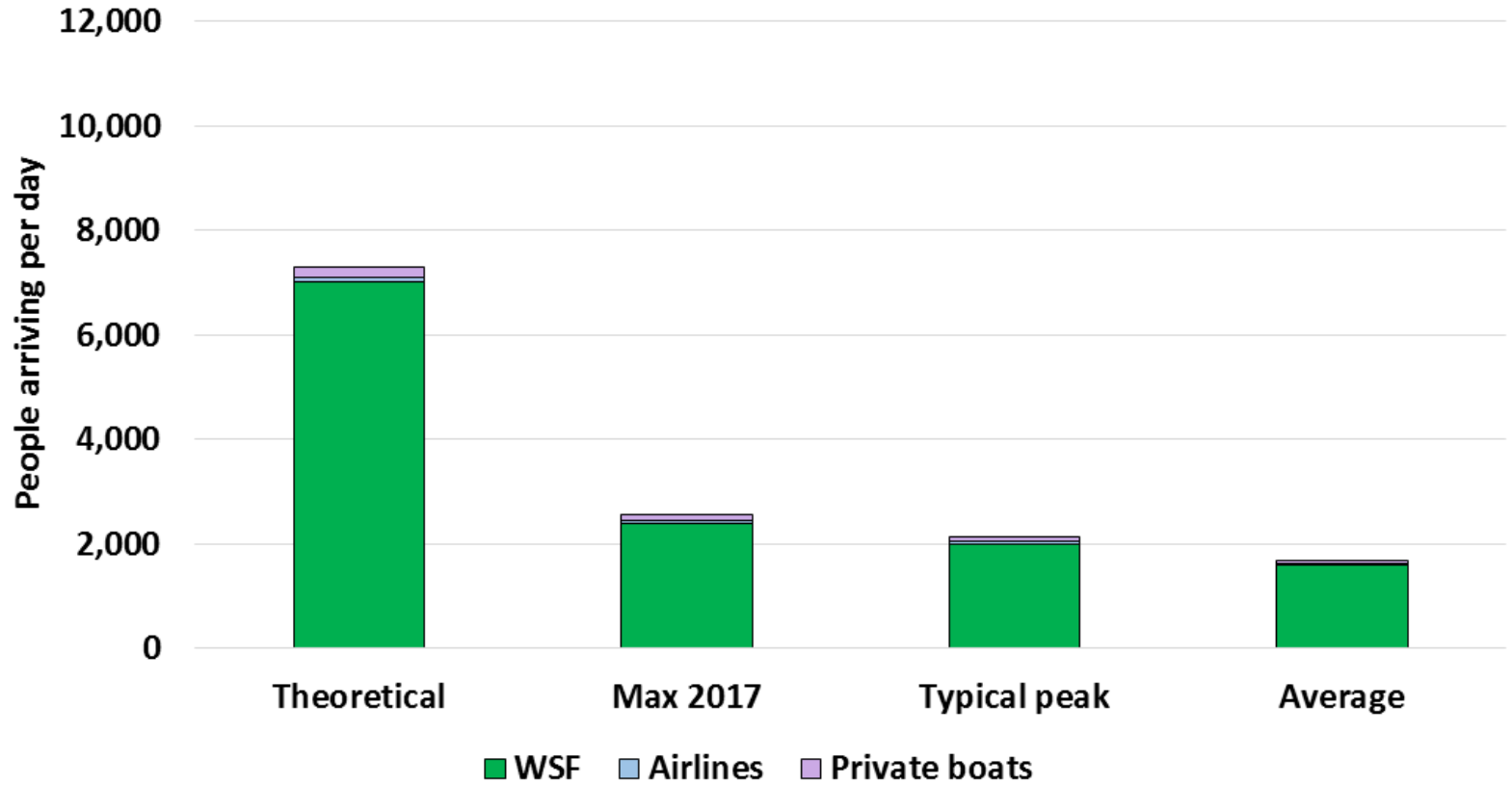


Private boats

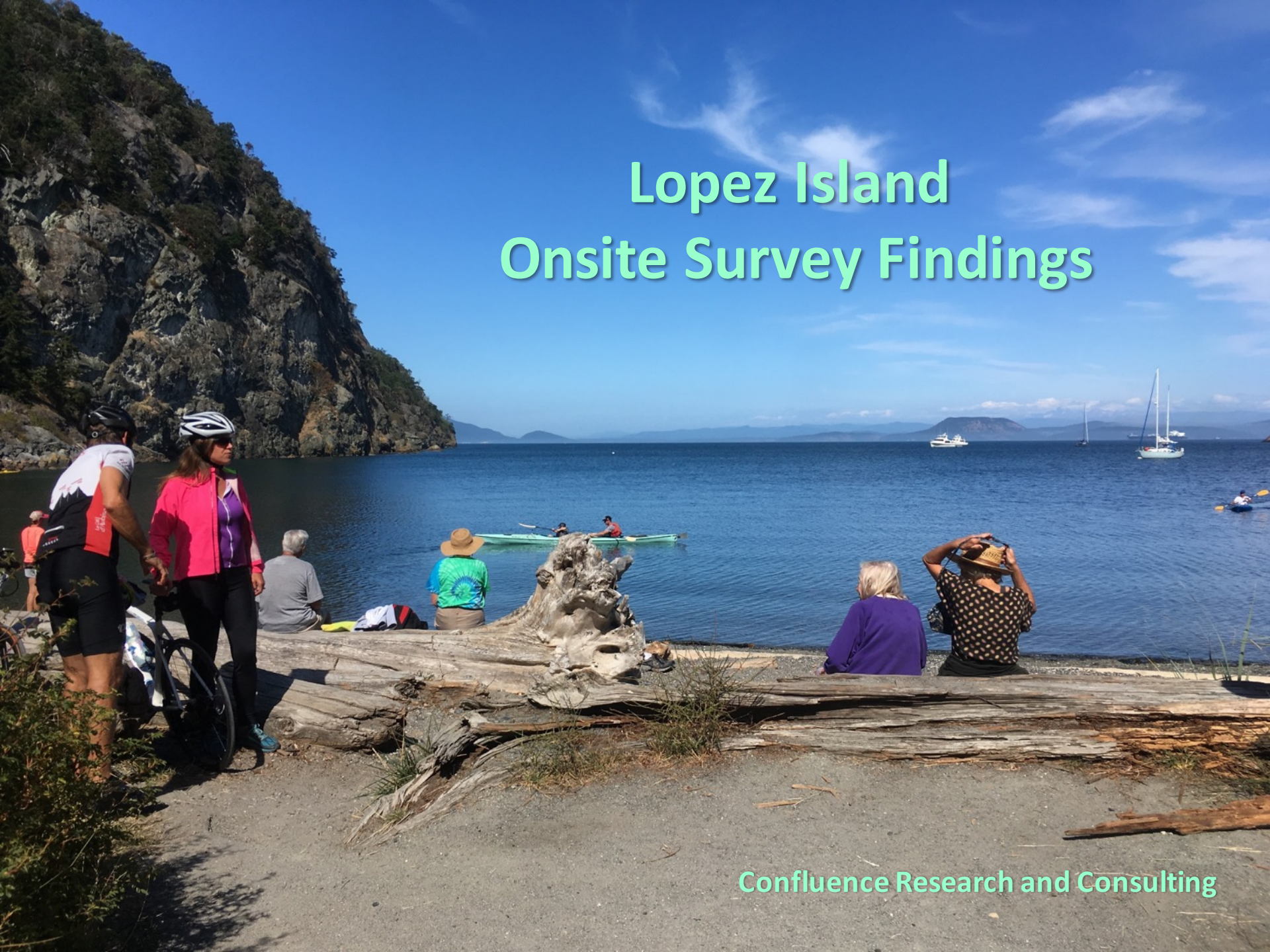


<2000 slips
<30% for cruisers (non-local)
Use estimate challenges

Lopez Island arrivals

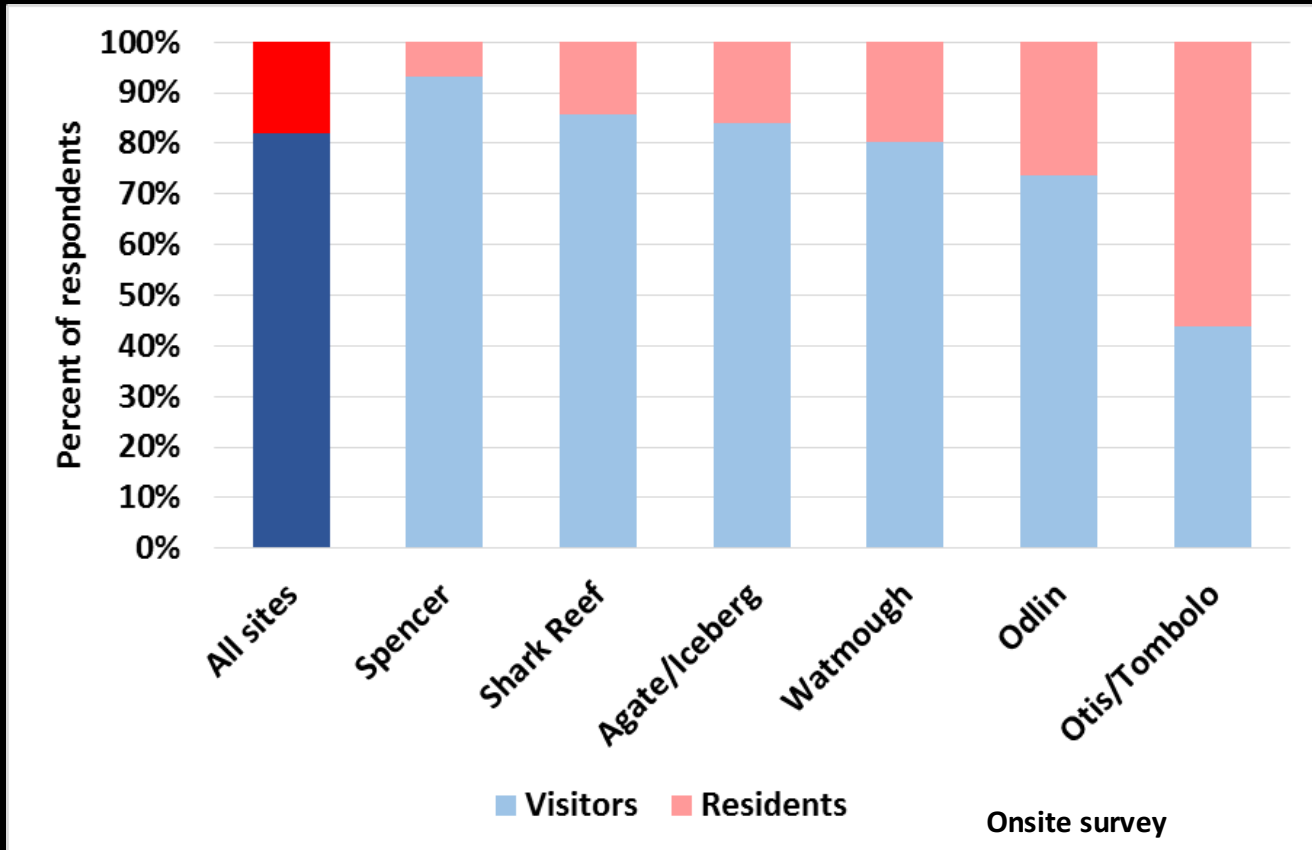


Lopez Island Onsite Survey Findings



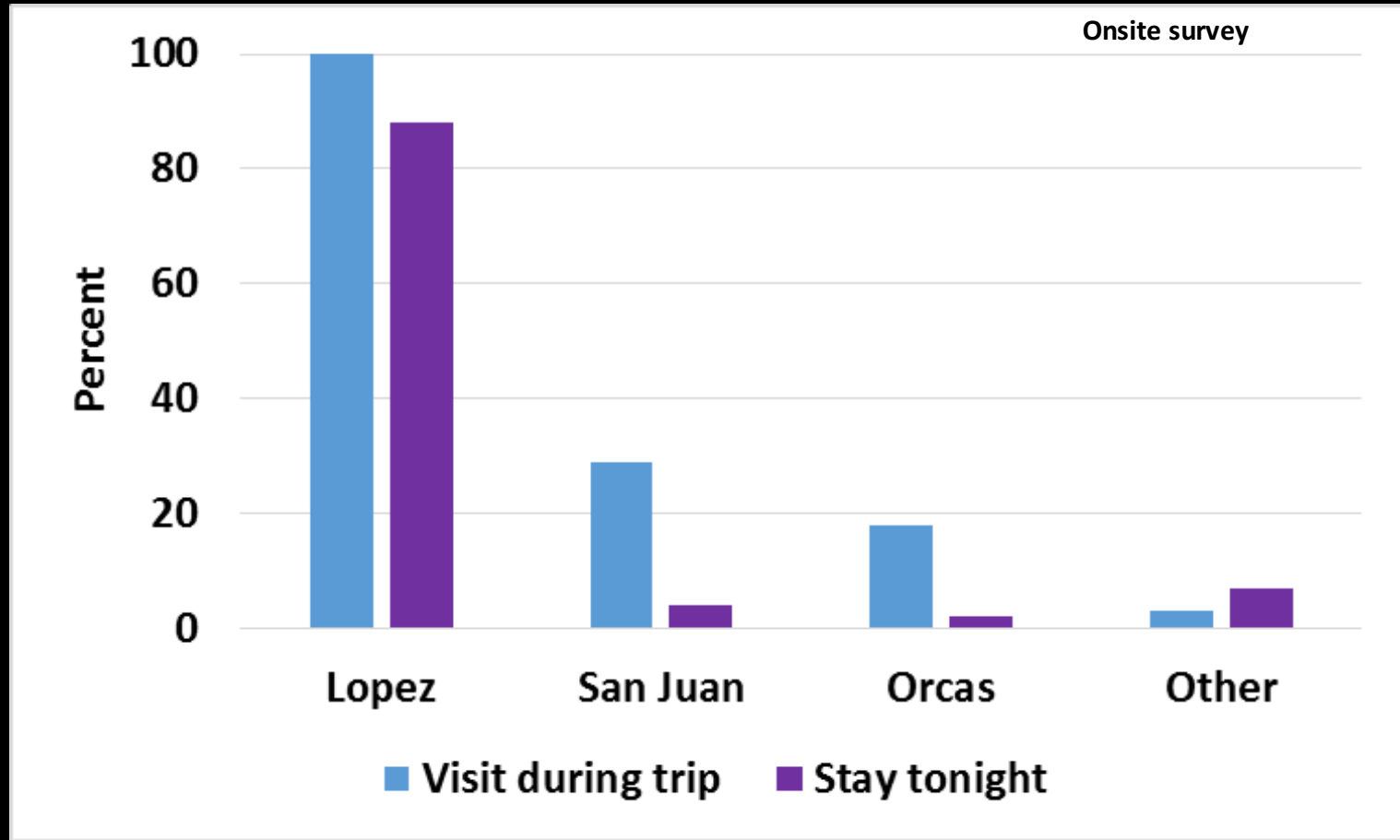
Lopez Island

Percent visitors (n=408) and residents (n=89)



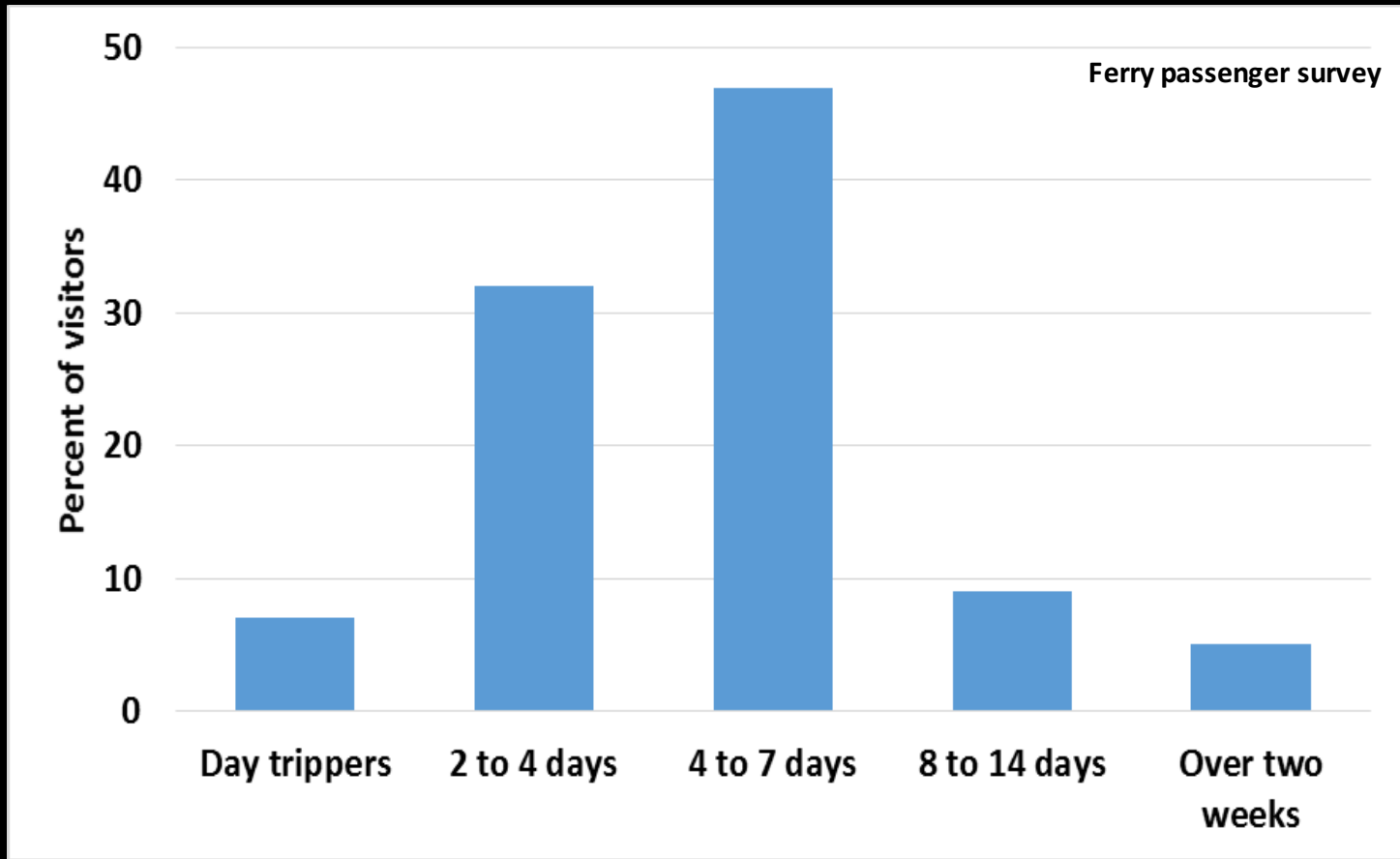
About 8 in 10 people at sites are visitors
But some sites have higher proportions
Highest percent at the fee-based site (Spencer)

Which islands do Lopez visitors go to?



Most Lopez visitors stay the night on Lopez
About a quarter visit San Juan and a fifth visit Orcas, but few stay on those islands
3% visit other islands (Shaw, Decatur, and Sucia)
7% are commuters or day trippers
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Lopez visitor length of stay



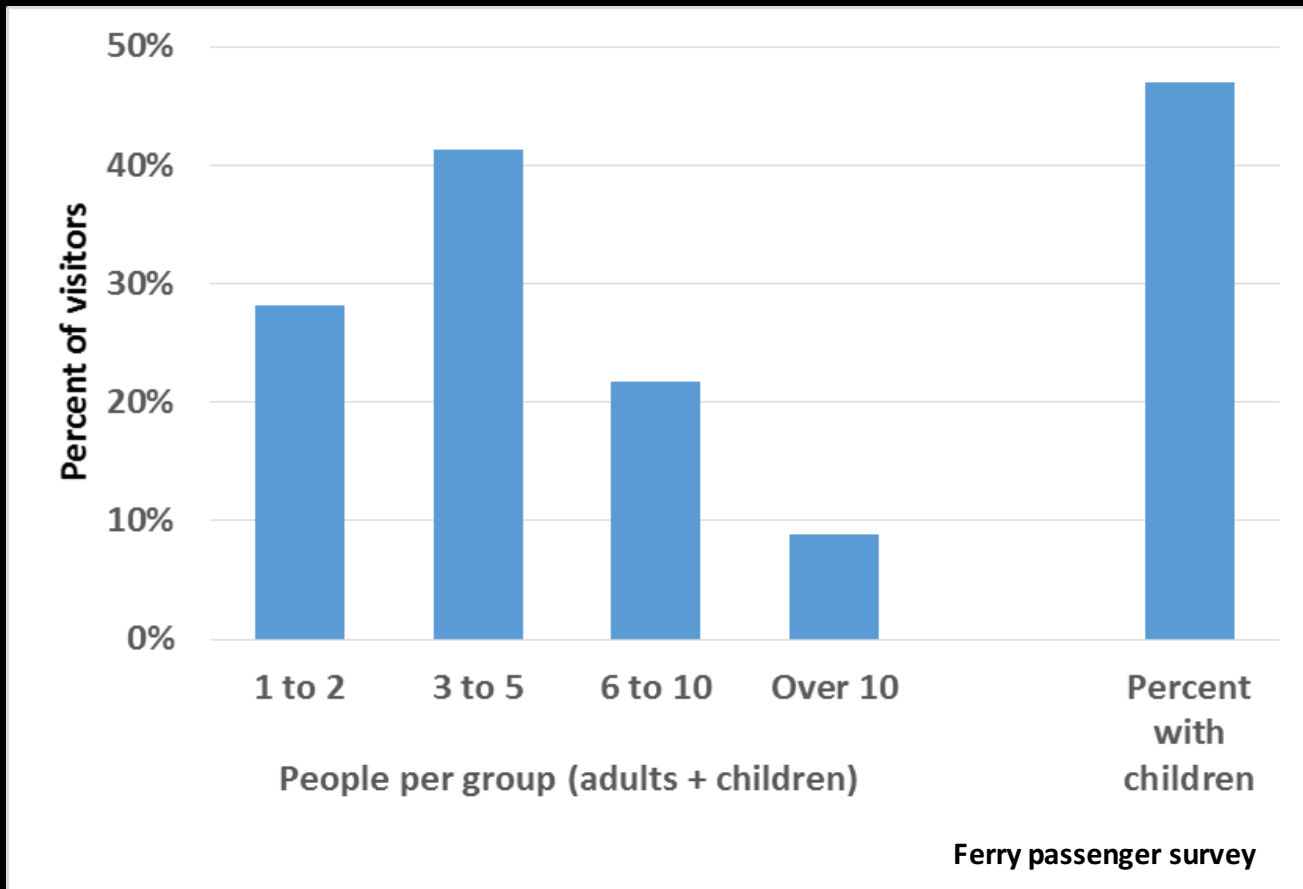
Relatively little day use

Median 4.0 days

Most stay longer than a weekend

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Lopez visitor group size



Mostly small groups

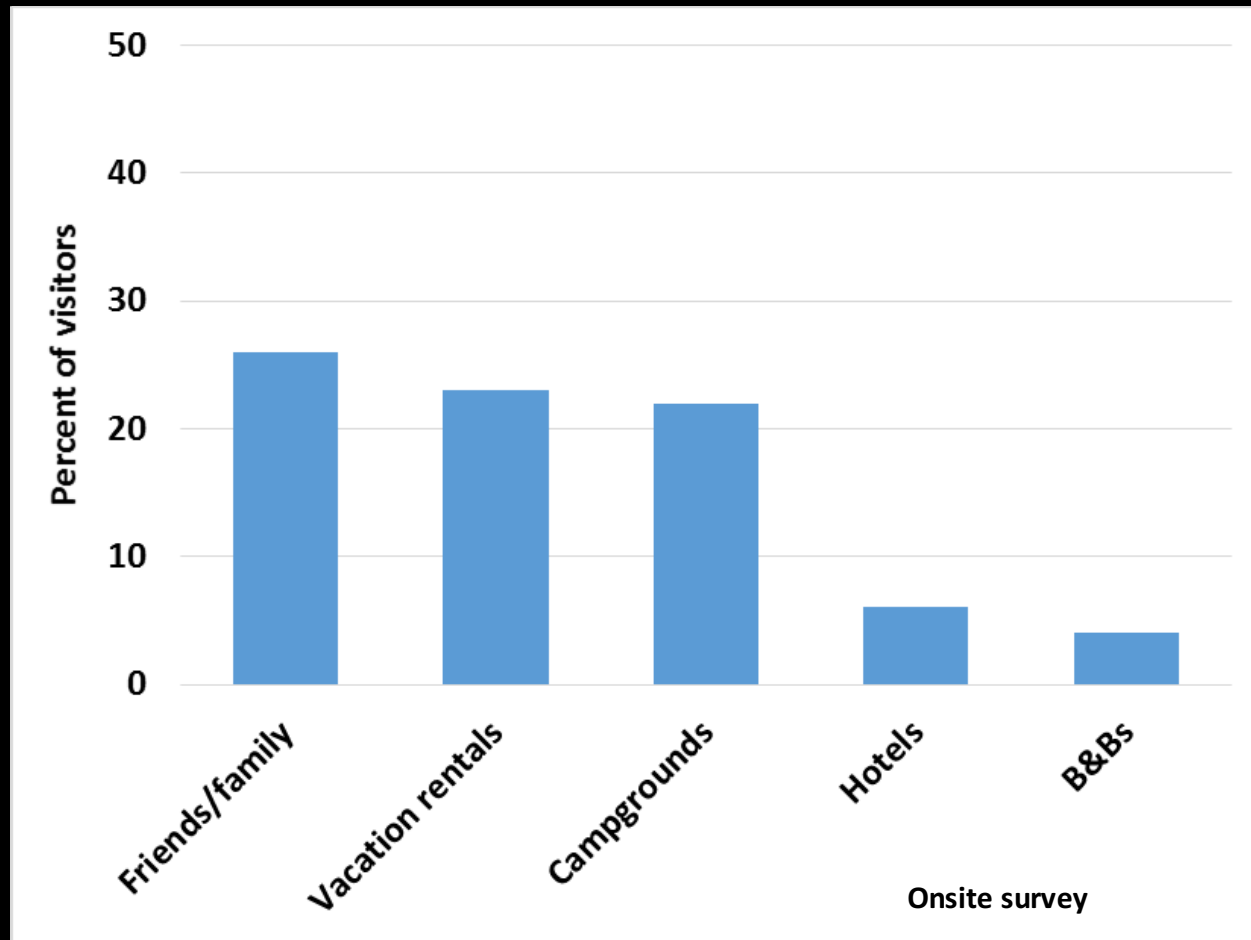
About half have children

Averages: 1.5 kids + 3.7 adults = 5.1 total

15% of groups with children have >6 – multi-family groups

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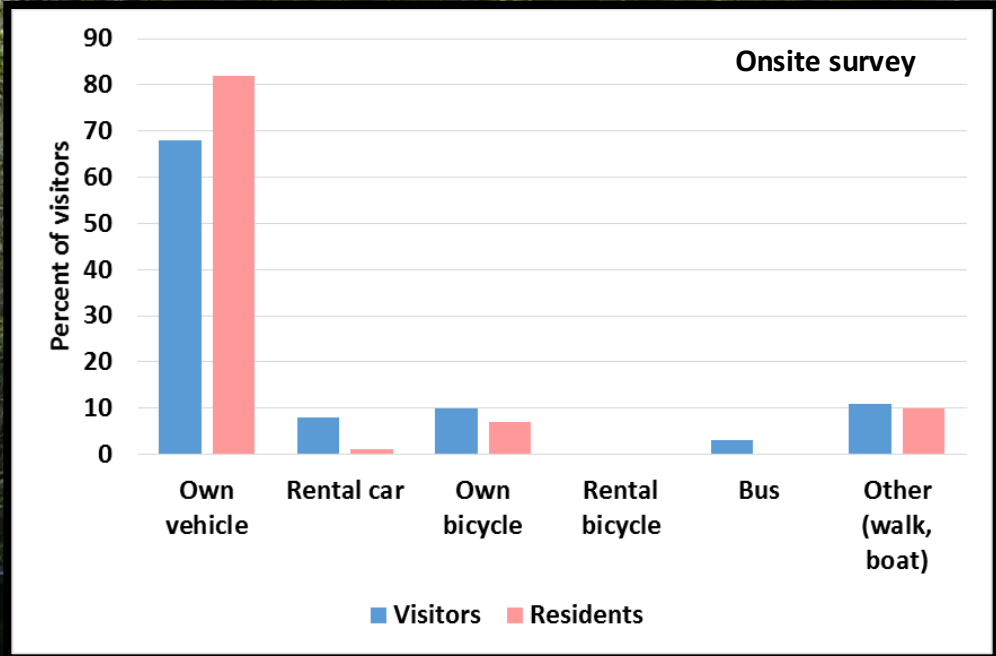
Lopez visitors' accommodation (excludes Odlin & Spencer)



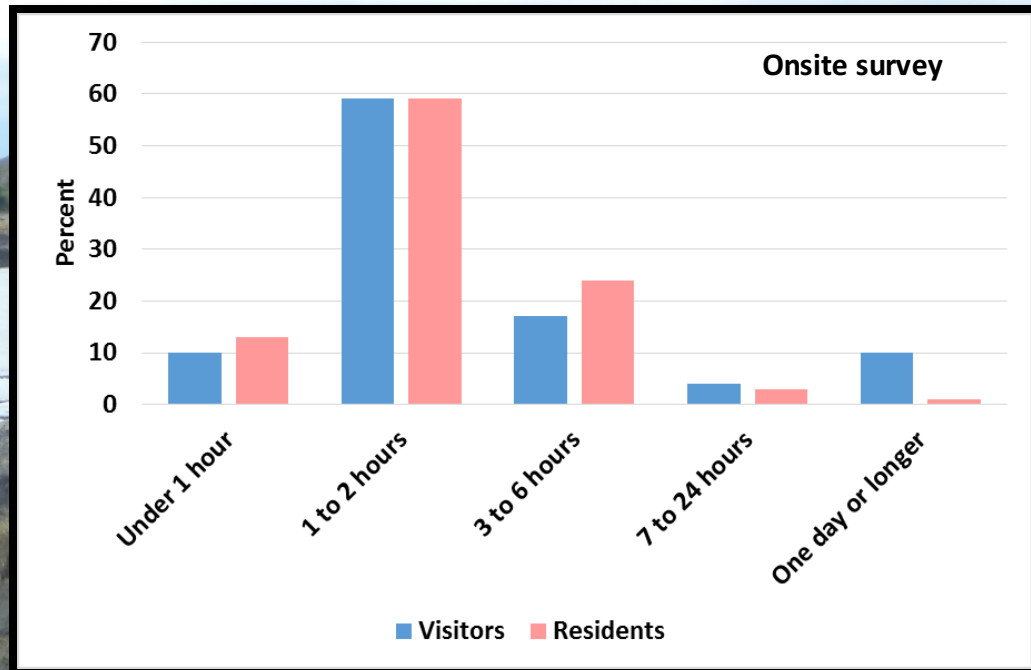
About half of Lopez visitors rent or stay in family/friend homes
Another 22% camp – relatively few in hotels and B&Bs
39% of Watmough visitors stay with family/friends – hidden destination?

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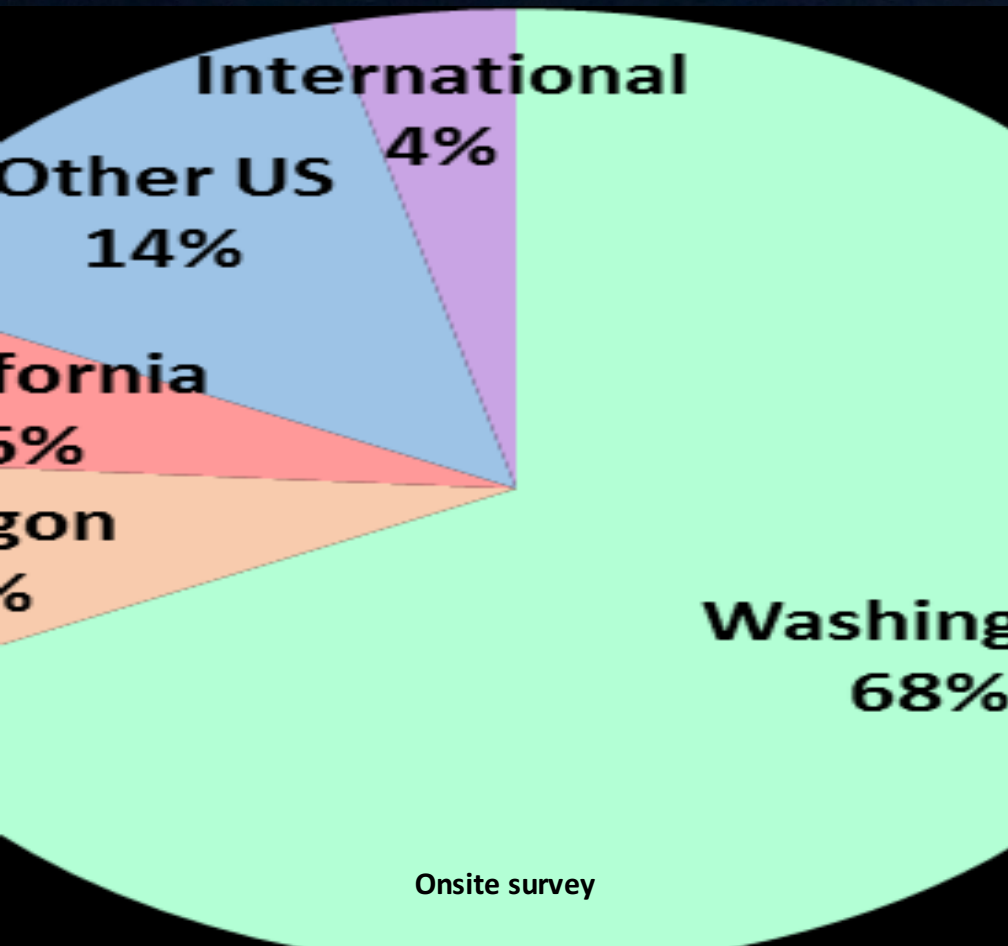
Lopez travel to sites – Visitors and residents



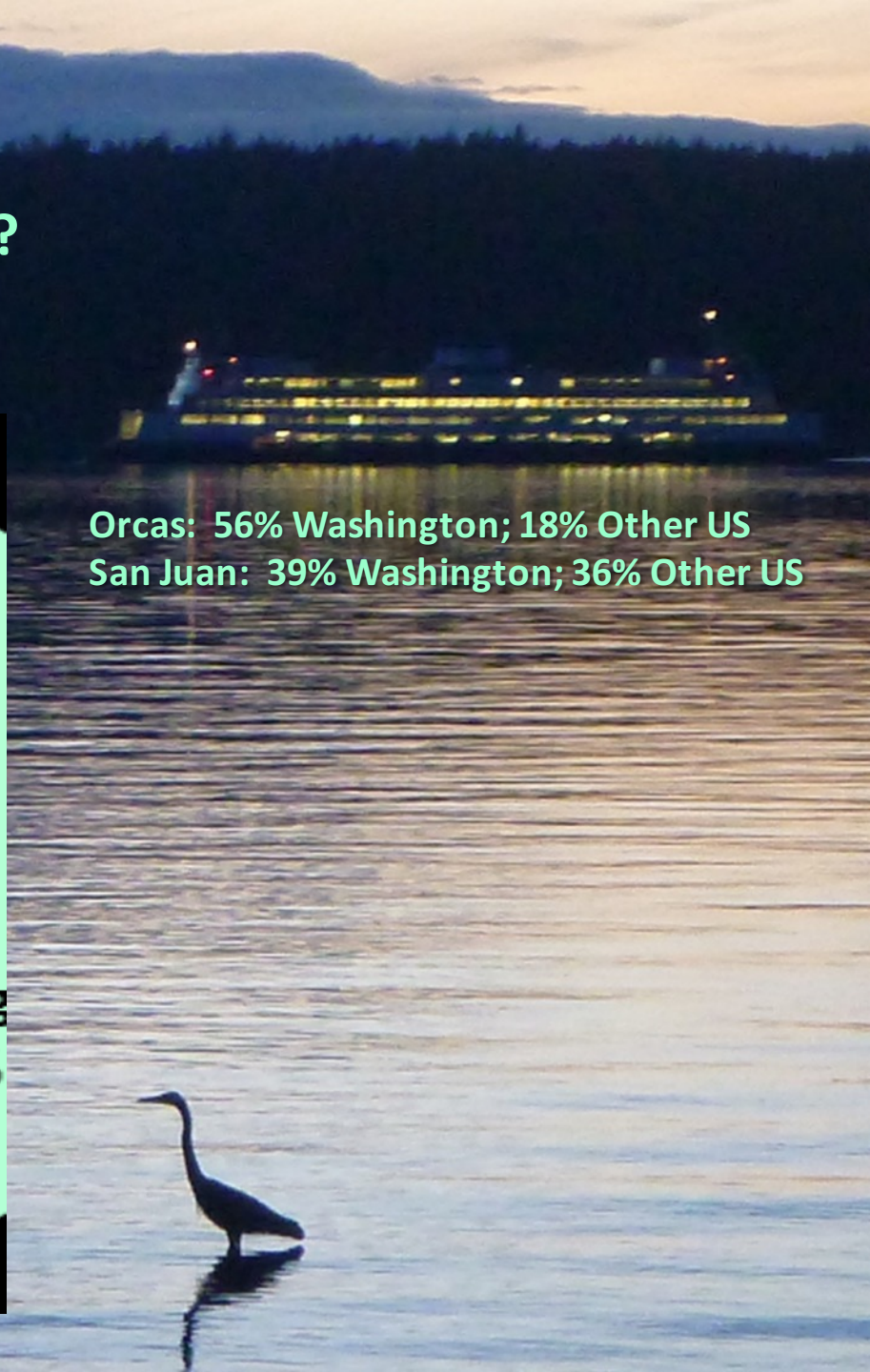
Lopez length of visit to sites Visitors and residents



Lopez visitors – Where are they from?



Orcas: 56% Washington; 18% Other US
San Juan: 39% Washington; 36% Other US



Lopez Island – Other profile information from residents (n=89)

87% live on Lopez
8% on San Juan Island
4% on Orcas Island

Median 15 years living on islands (average 27)

64% year-round residents

26% 4 to 11 months

10% < 4 months

Visit sites 4.4 times /month

25% visit 10 times per month

(Ferry Passenger Survey)

Who are they?

From onsite and ferry survey

Outdoor recreation participation

From ferry survey

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

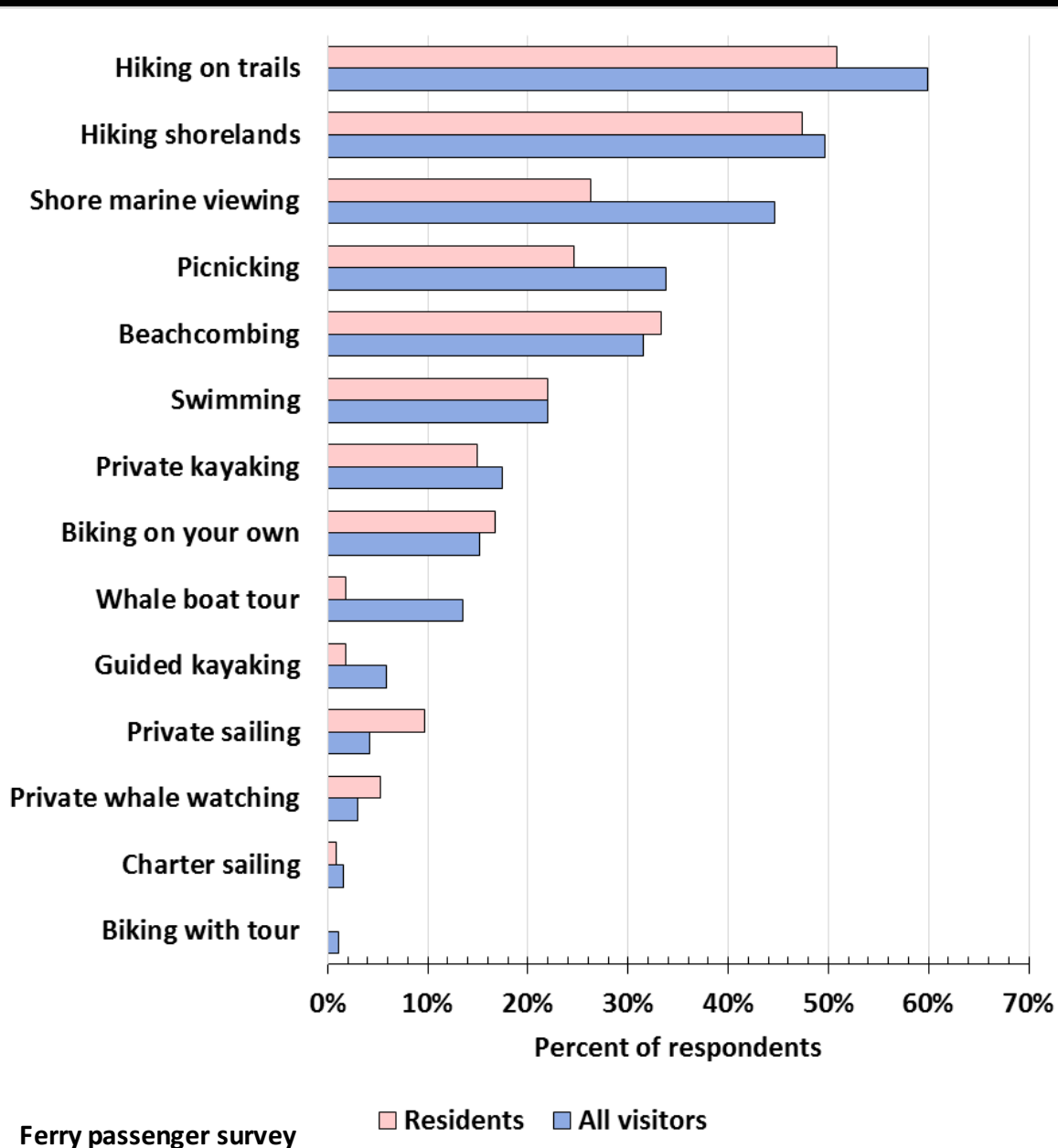
Hiking on trails

Etc.

14 activities listed on survey

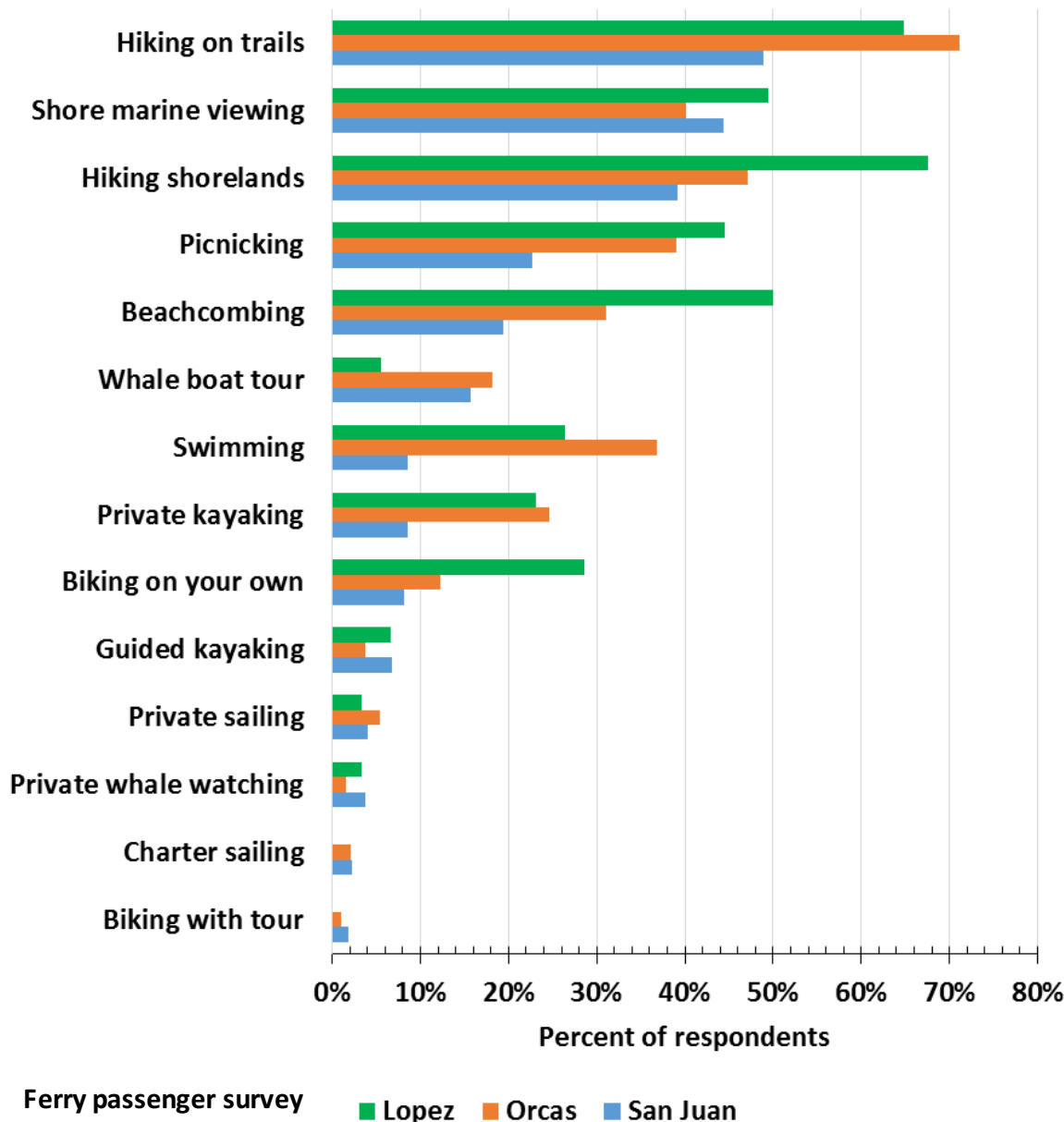
Percent of visitors and residents who checked each shown on graph

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

The San Juan Islands Experience

From ferry survey

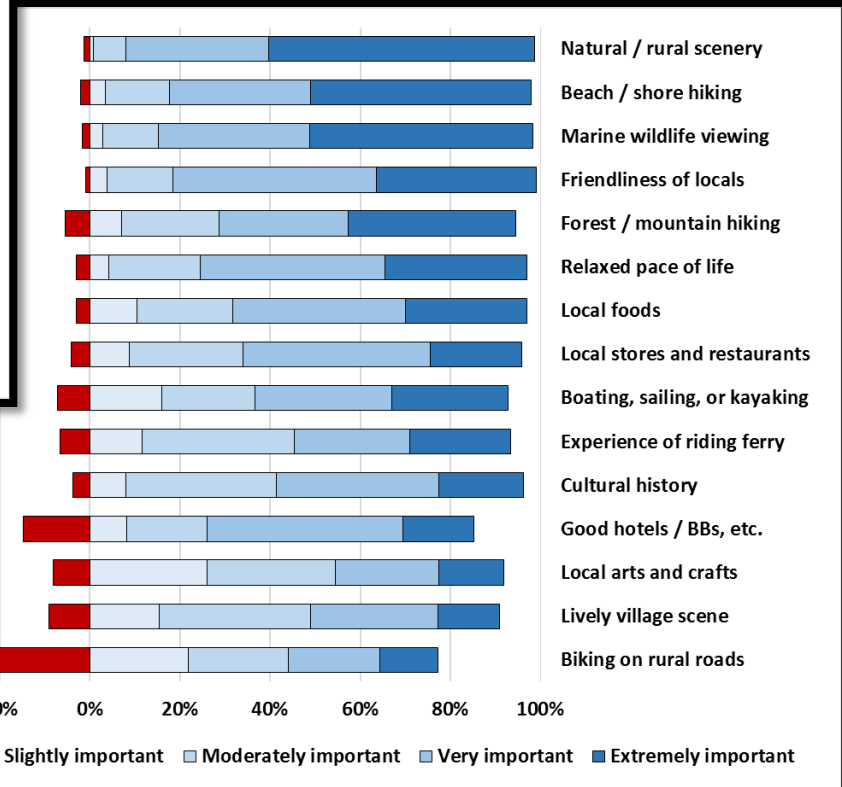
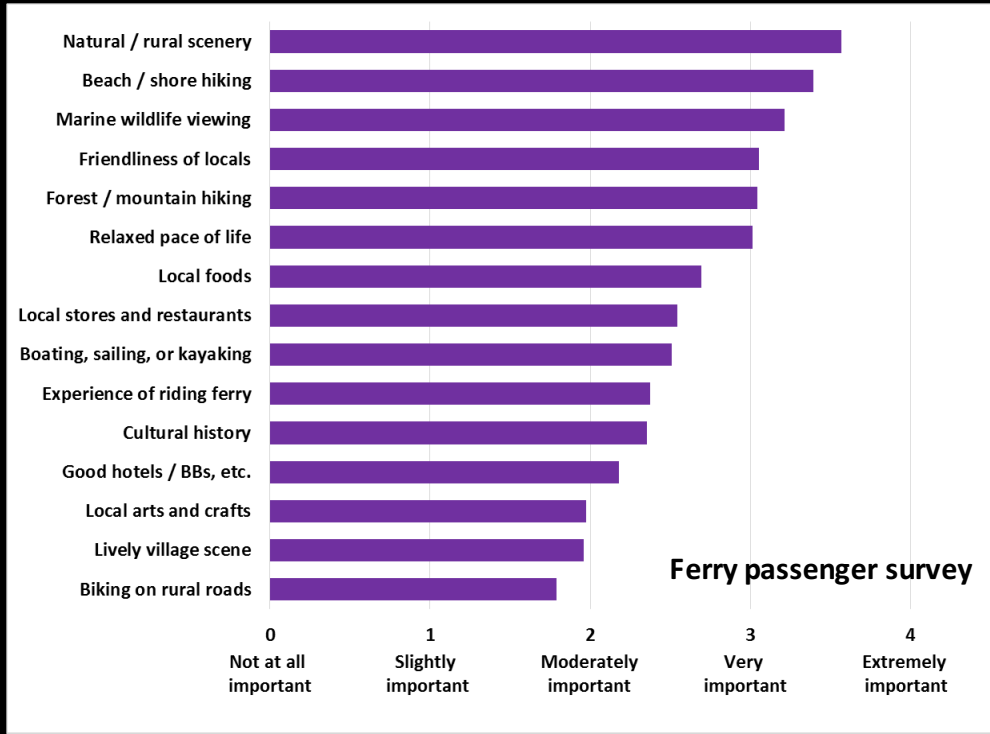
“People enjoy the San Juan Islands for many reasons. Please rate the following reasons for you.”

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

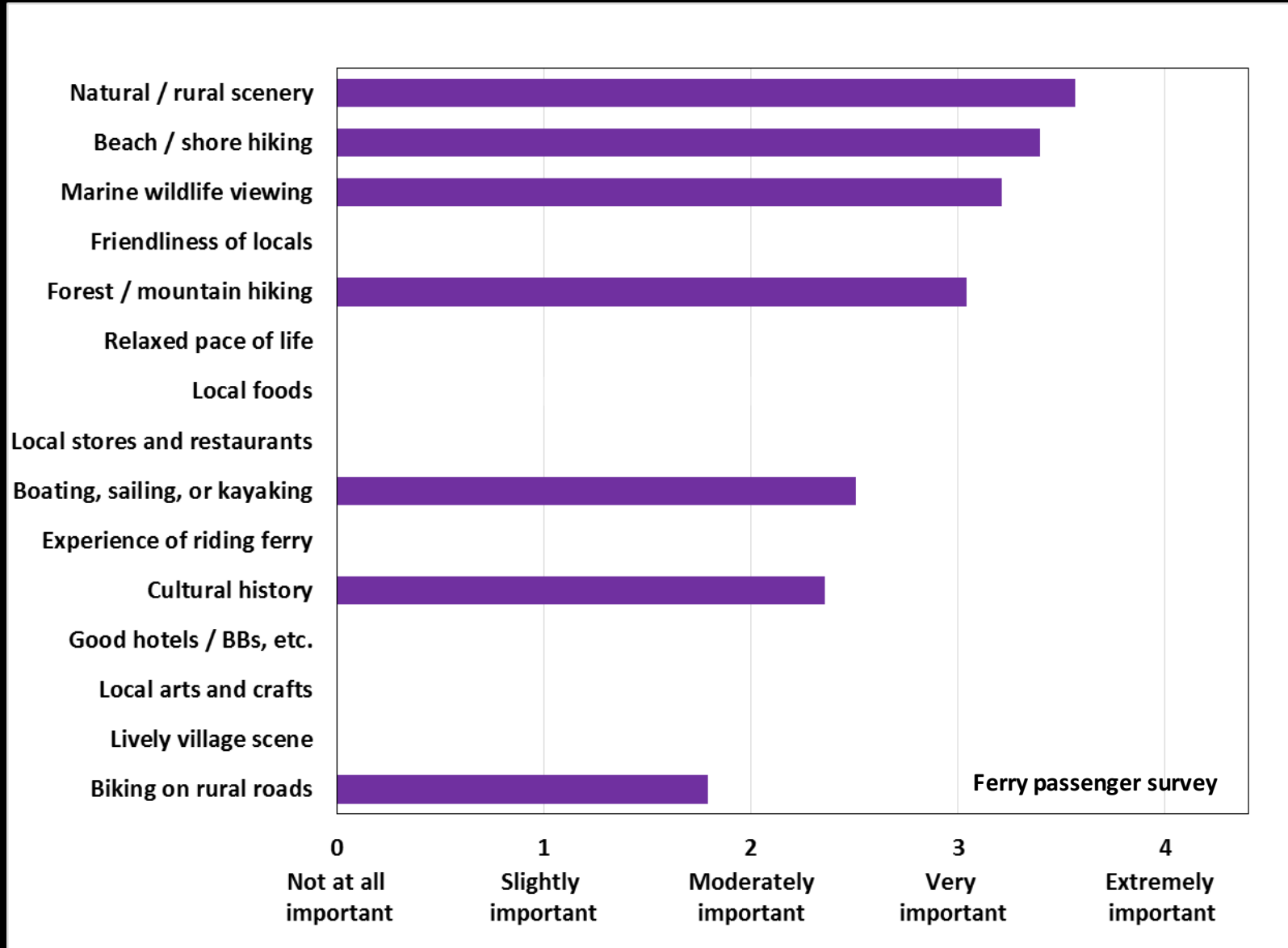
15 items on the survey

Average importance of 12 key items on following graph

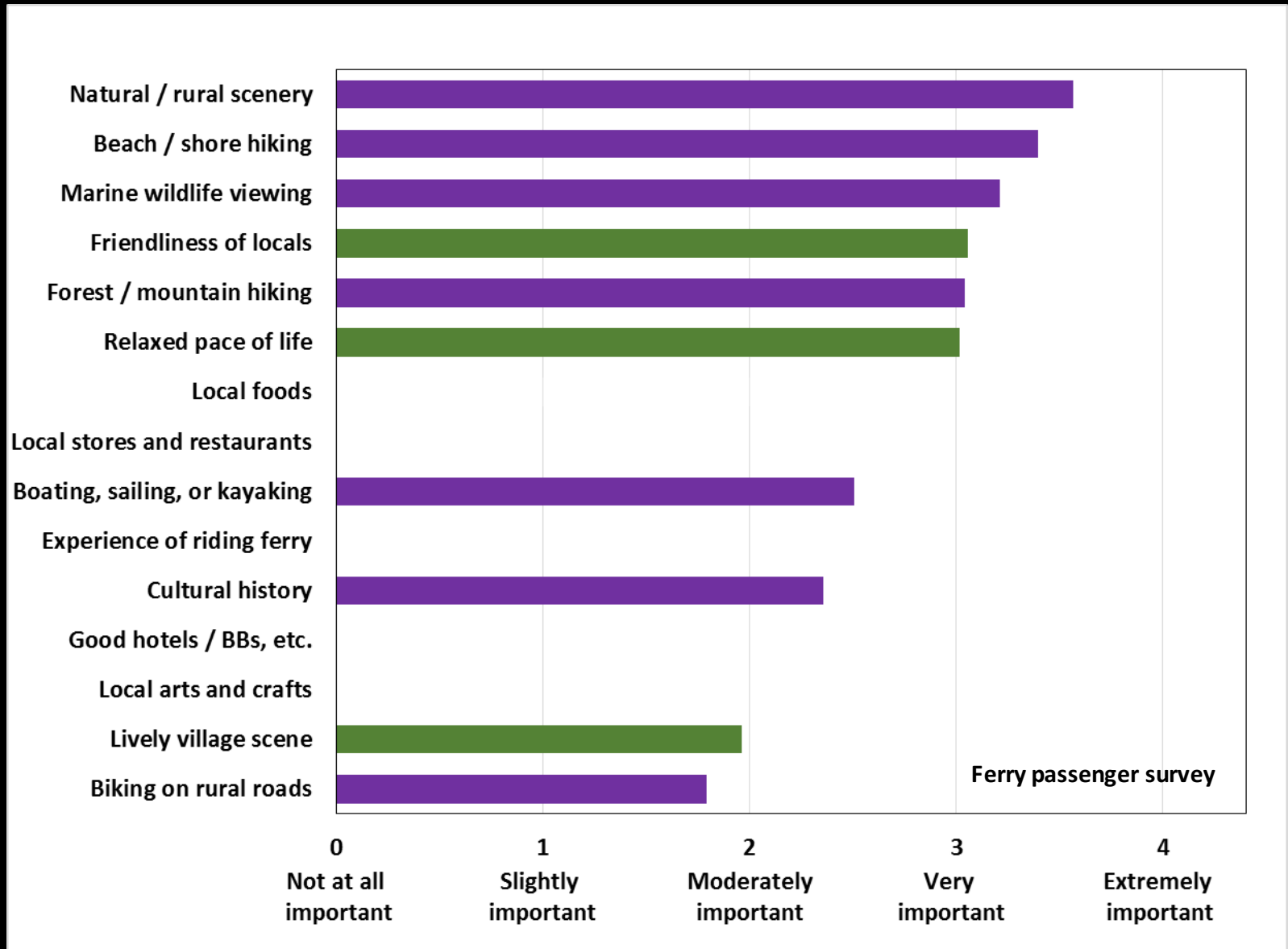
Experience importance: two ways to analyze



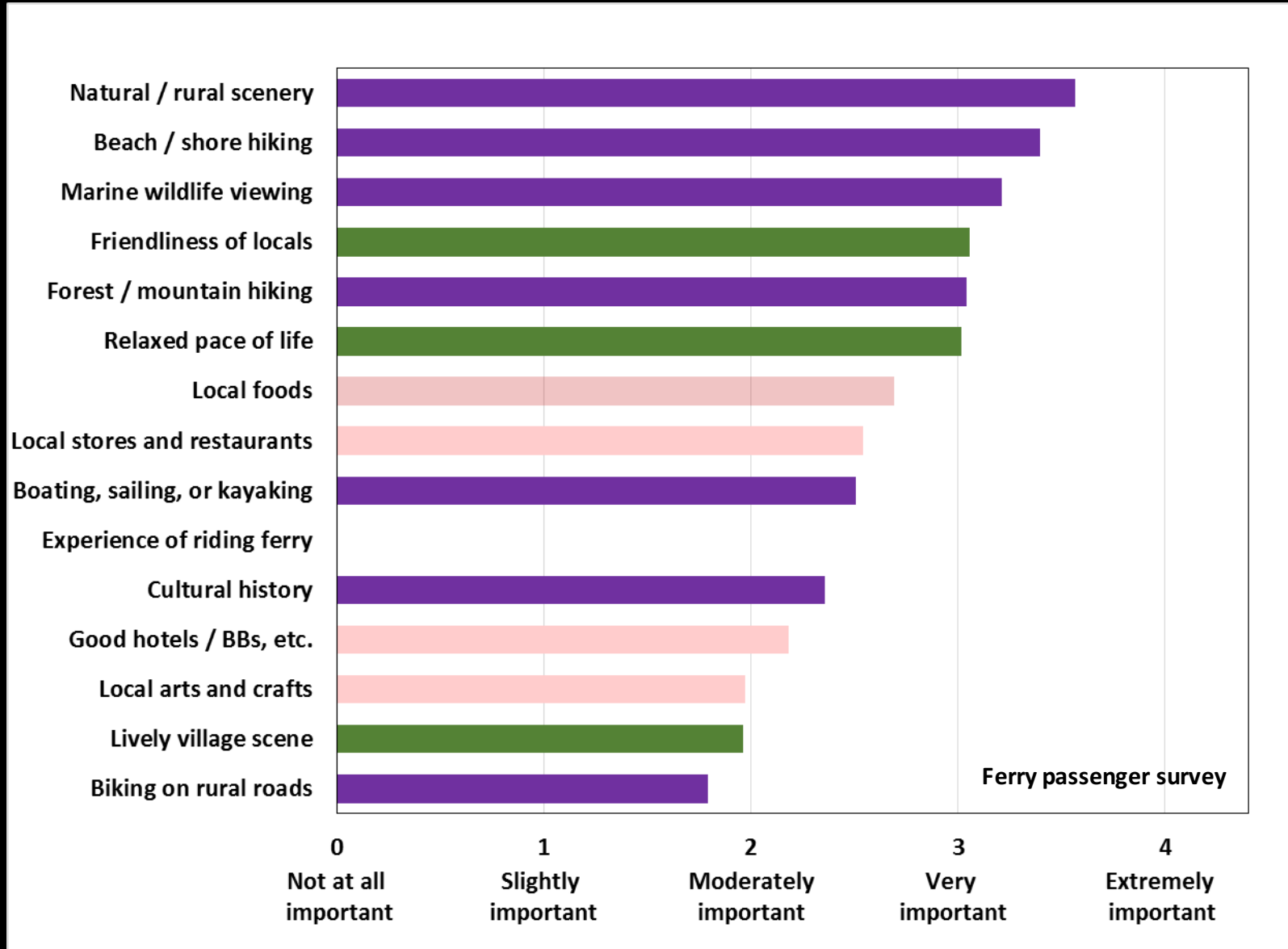
4 of 5 most important experiences rely on natural resources



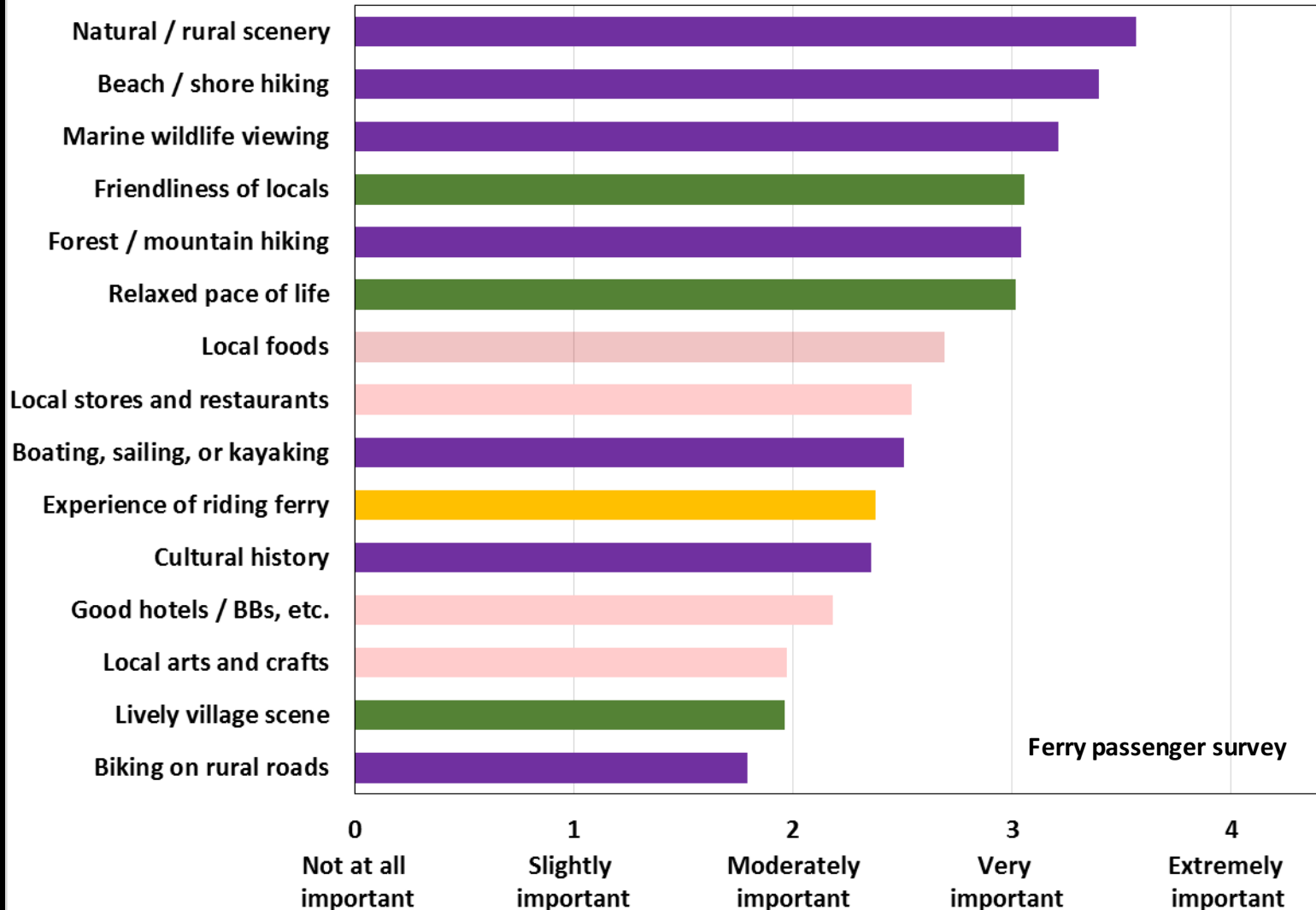
Social setting: Friendliness & relaxed pace > lively village scene

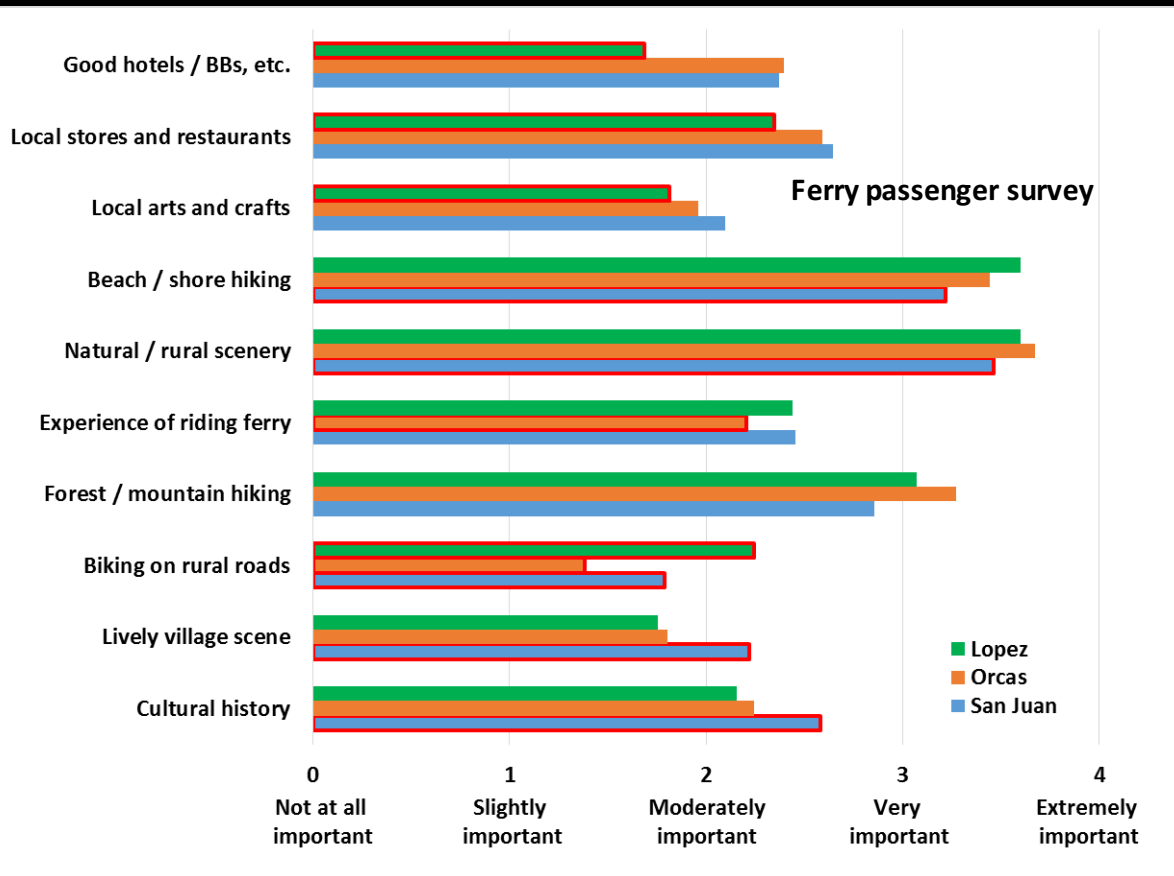


Tourism development is relatively less important



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 do they stay?



Types of Accommodation



**Vacation Rental
Inventory**

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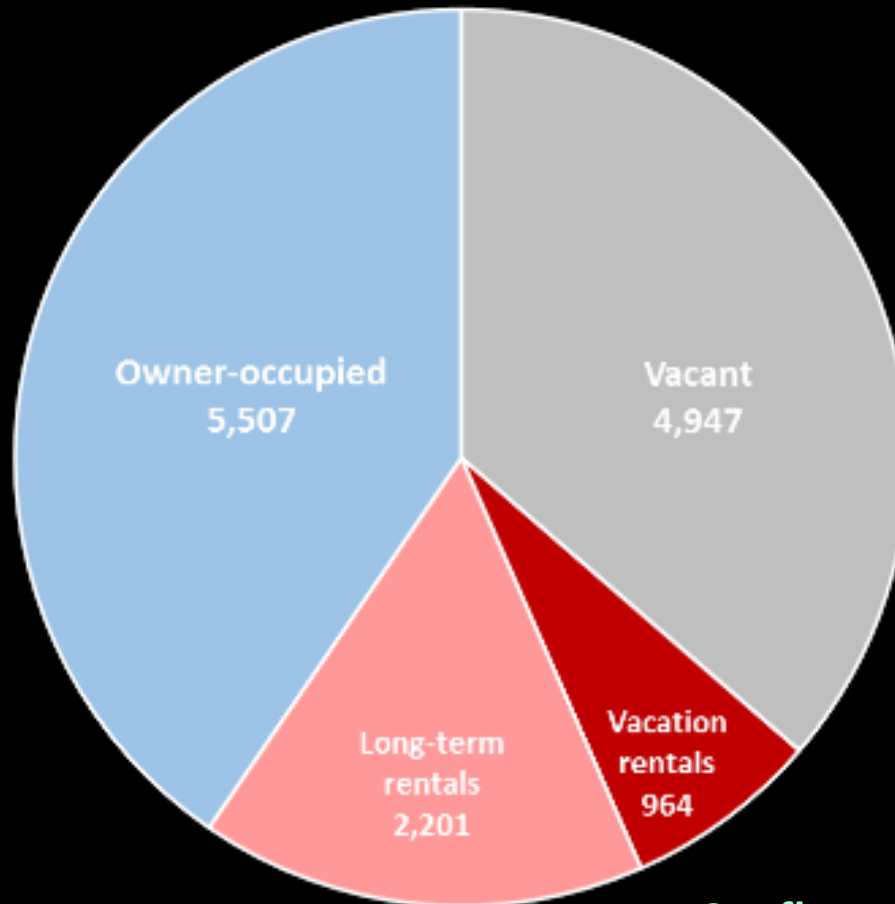


**Hotel
Inventory**

Overall housing stock

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

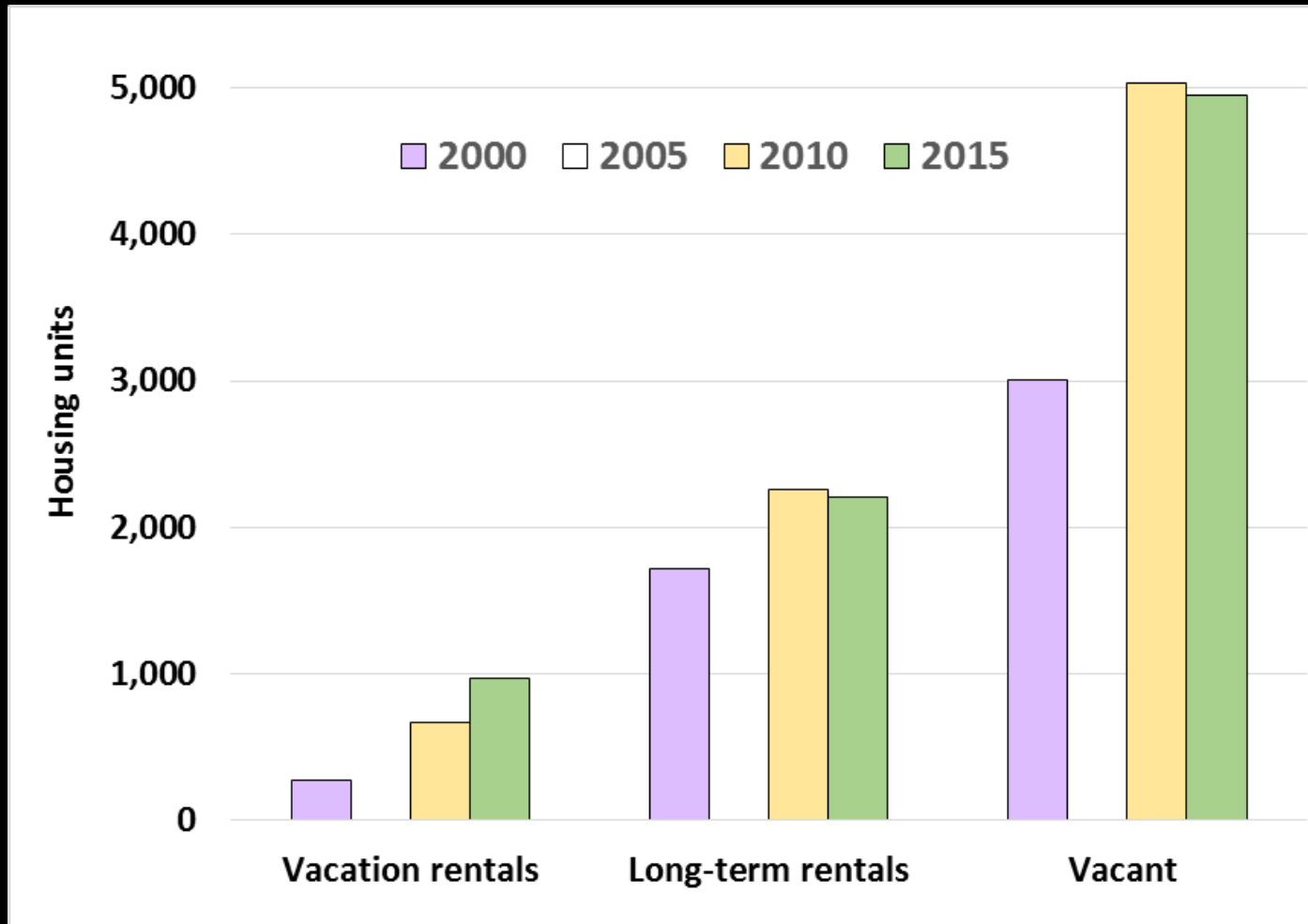
Four categories




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Changing proportions

Declining long-term rentals and “vacant” homes
Increasing vacation rentals



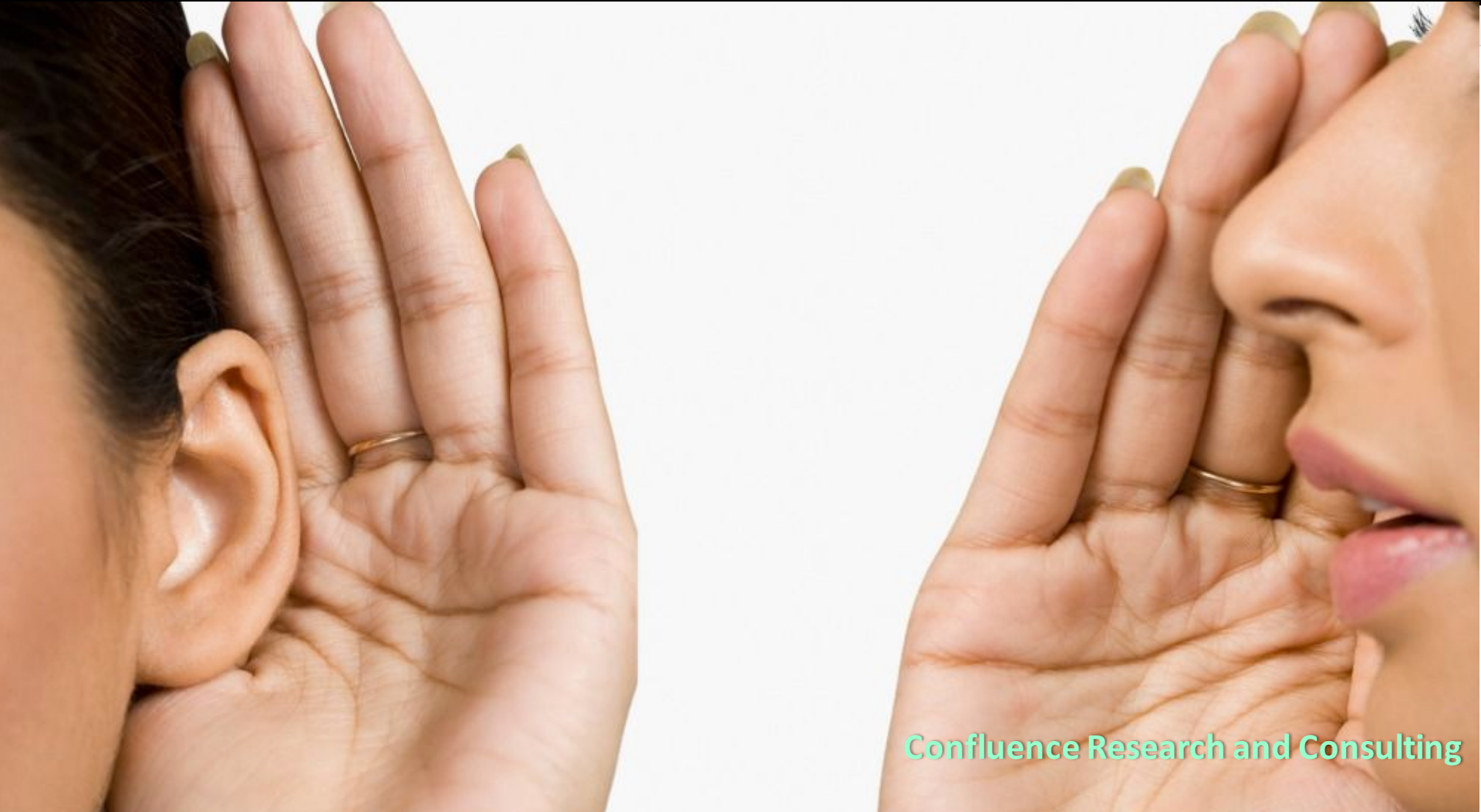
Source: SJI County DCD 2017 briefing on vacation rental code amendments (Erica Shook & Linda Kuller)



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

The screenshot shows an Airbnb search results page for "San Juan Islands - Homes". The search parameters are "Jan 17 - Jan 21" for "1 guest". The results are displayed in a grid of nine cards, each featuring a property photo, title, type, price, and rating. A map on the right side of the page shows the location of the properties on the San Juan Islands, with price tags overlaid on the map. The map also includes labels for various islands and landmarks such as Stuart Island, Roche Harbor, Henry Island, Yacht Haven, Lakedale, Shaw Island, and West Beach. The price tags on the map range from \$94 to \$581. The search bar at the top right includes options for "Become a host", "Help", "Sign Up", and "Log In".

San Juan Islands · Homes

Jan 17 - Jan 21 | 1 guest | Home type | Price | Instant Book | Trip type | More filters

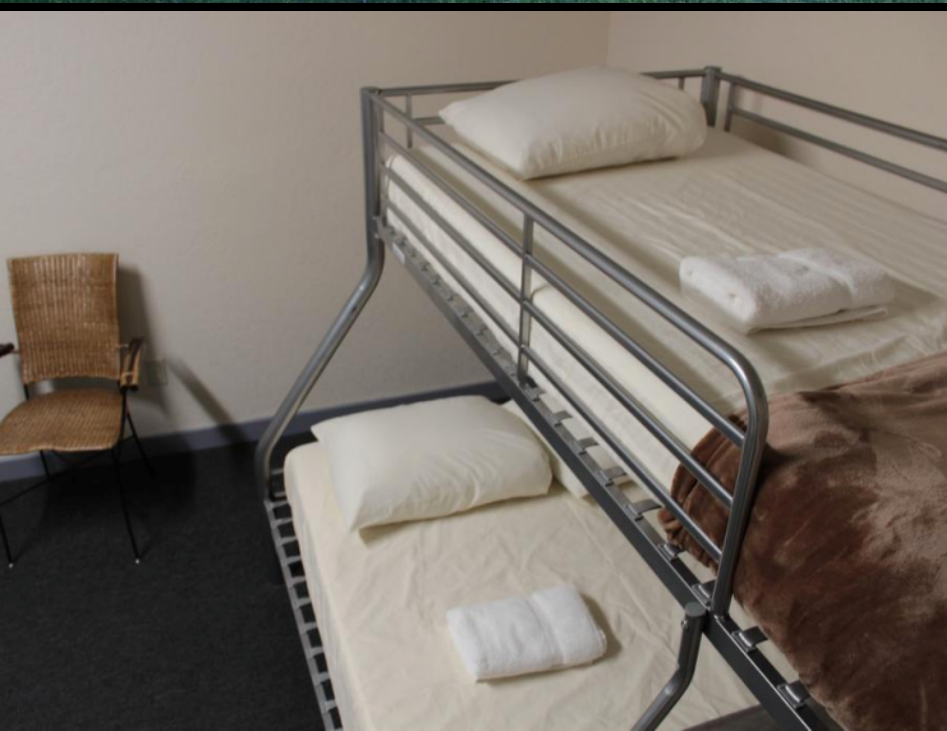
- VACATION HOME · 5 BEDS**
Utter Seclusion - Friday Harbor, San Juan Island
\$220 per night
★★★★★ 9
- TINY HOUSE · 1 BED**
The Cabin of Two Bears on San Juan Island
\$112 per night · Free cancellation
★★★★★ 36 · Superhost
- ENTIRE HOUSE · 4 BEDS**
San Juan Bay - Garrison Bay Waterfront Home!
\$426 per 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
- ENTIRE HOUSE · 2 BEDS**
Famous Romantic Gnome House Chalet
\$165 per night
★★★★★ 84

Map showing property locations and prices: \$581, \$112, \$426, \$220, \$94, \$229, \$288, \$161, \$173, \$203, \$165, \$256, \$102, \$176.

Language and currency

Map data ©2018 Google | Terms of Use | Report a map error






Hotel Inventory

An aerial photograph of a waterfront resort area. In the foreground, a large marina with several docks is filled with various boats, including sailboats and motor yachts. A long wooden pier extends from the shore into the water. Behind the marina, there are several buildings, including a large, modern-looking structure with a curved roof and a smaller building with a blue roof. The area is surrounded by lush green trees and a grassy field. In the background, a dense forest of tall evergreen trees covers a hillside.

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



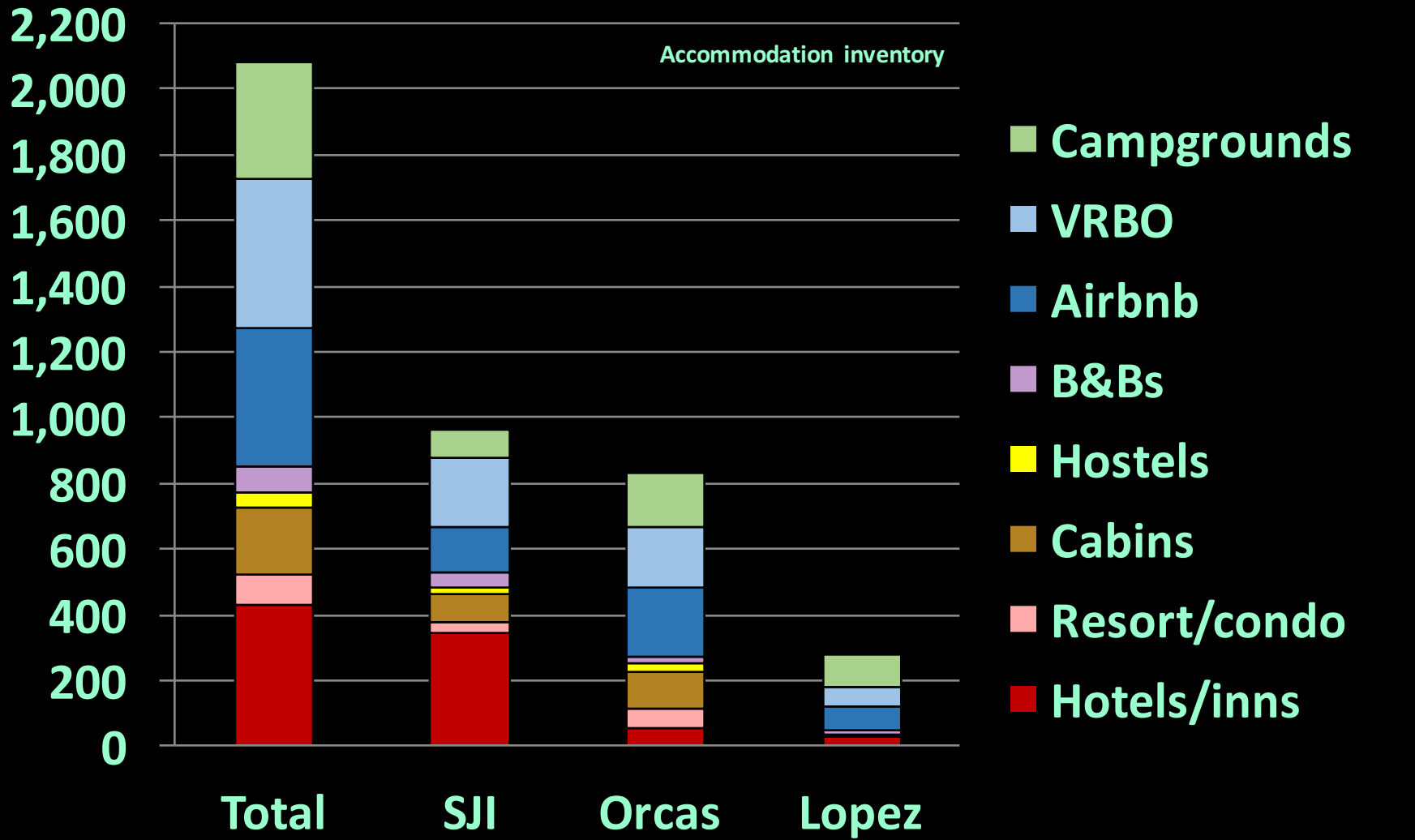


**~ 50% of units
have kitchens**

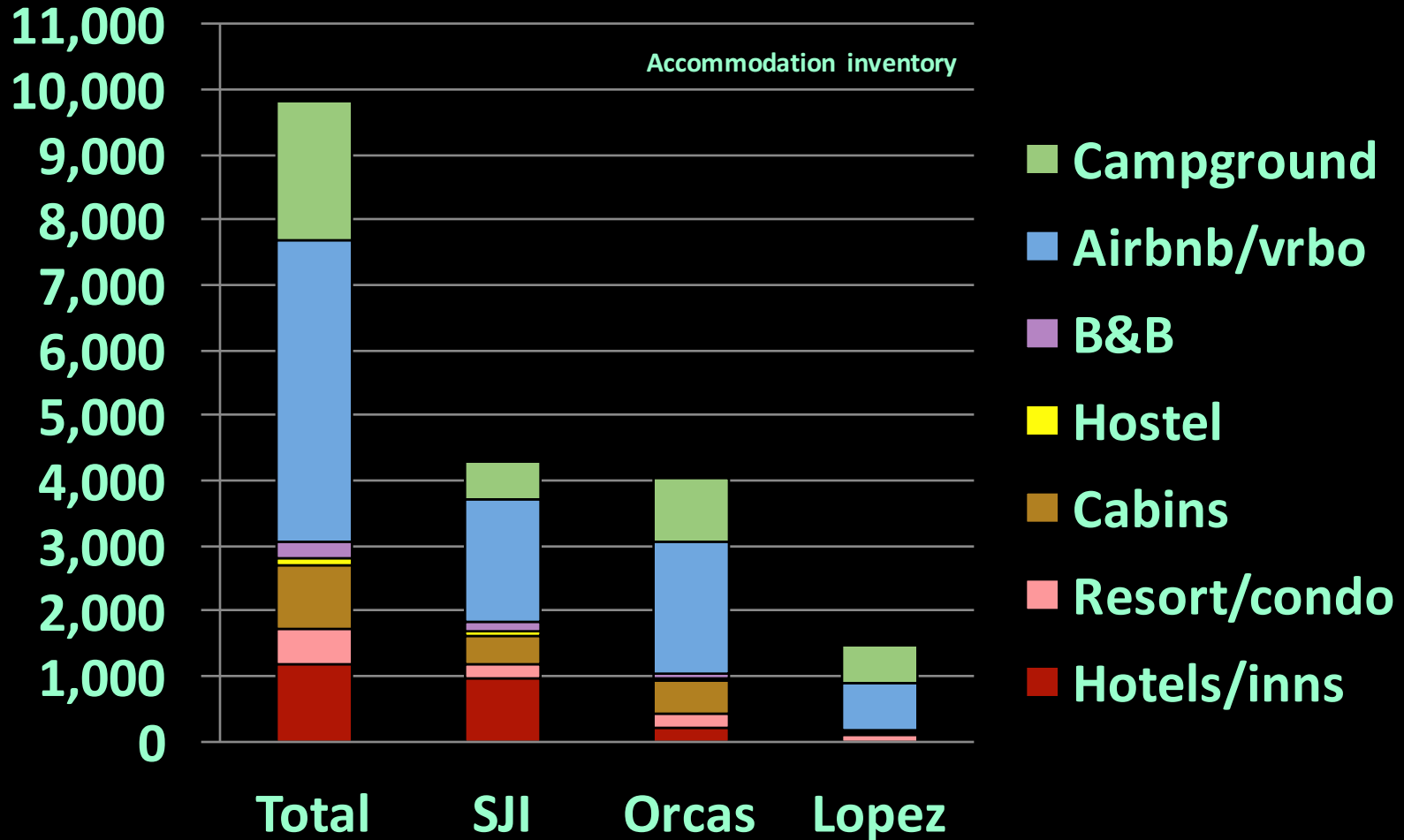
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Number of accommodation units

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

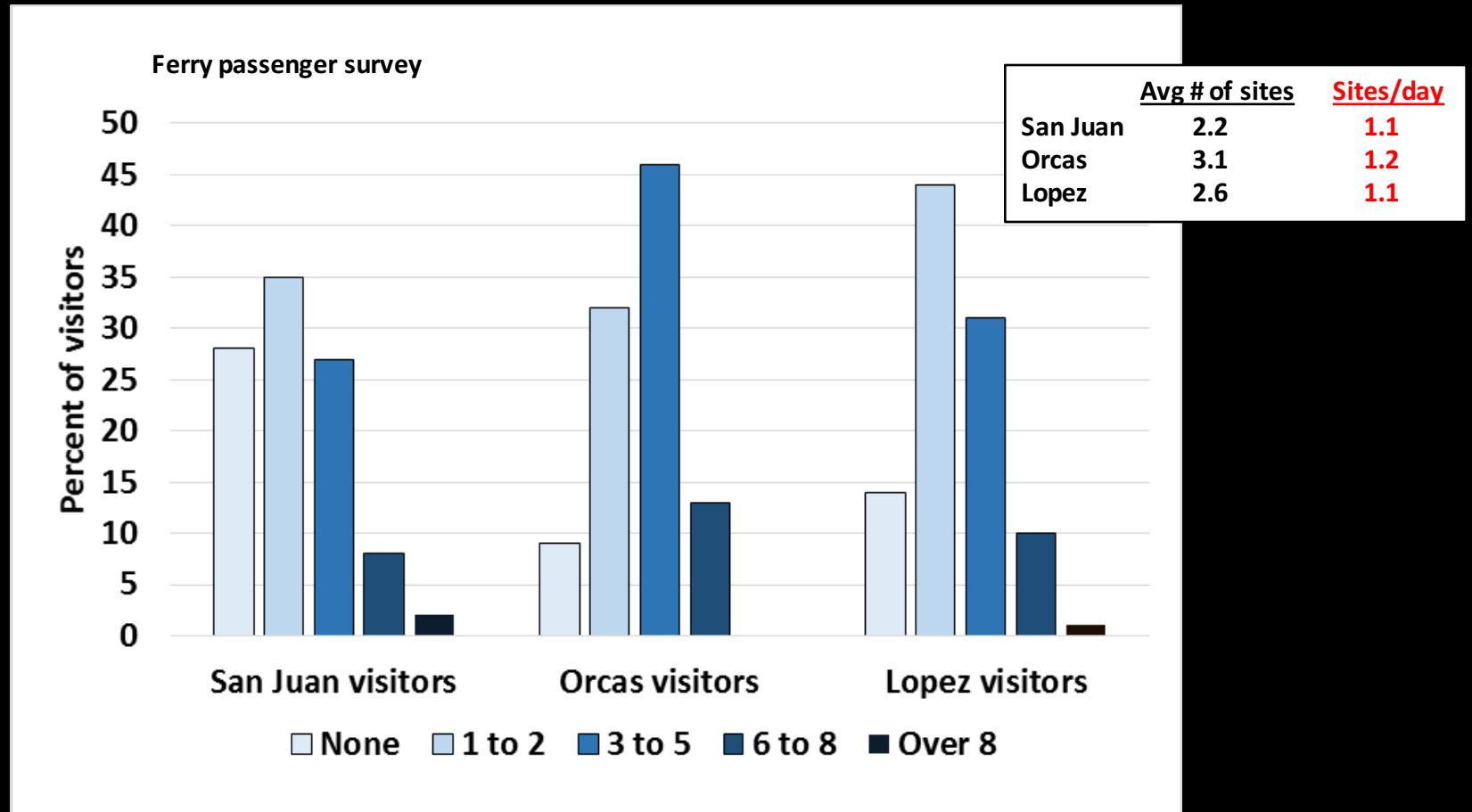
A scenic landscape photograph showing a person standing on a rocky, grassy cliff overlooking a body of water. The person is silhouetted against the sky. The water is calm and blue, with several small islands or peninsulas visible in the distance. The sky is light blue with some clouds. The foreground is dominated by large, grey rocks and patches of green grass.

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

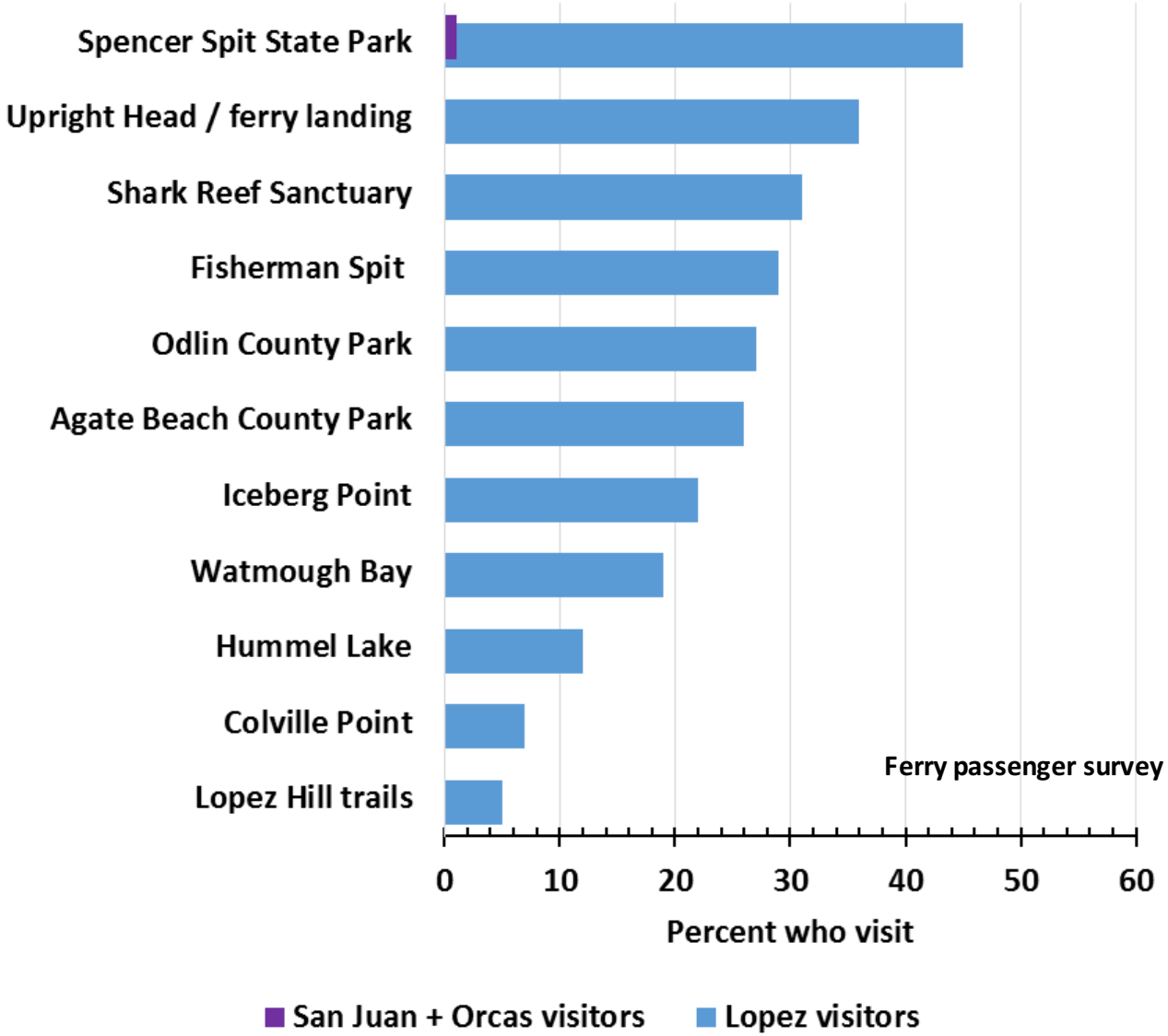
Orcas > Lopez > San Juan

More San Juan visitors don't visit any sites

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

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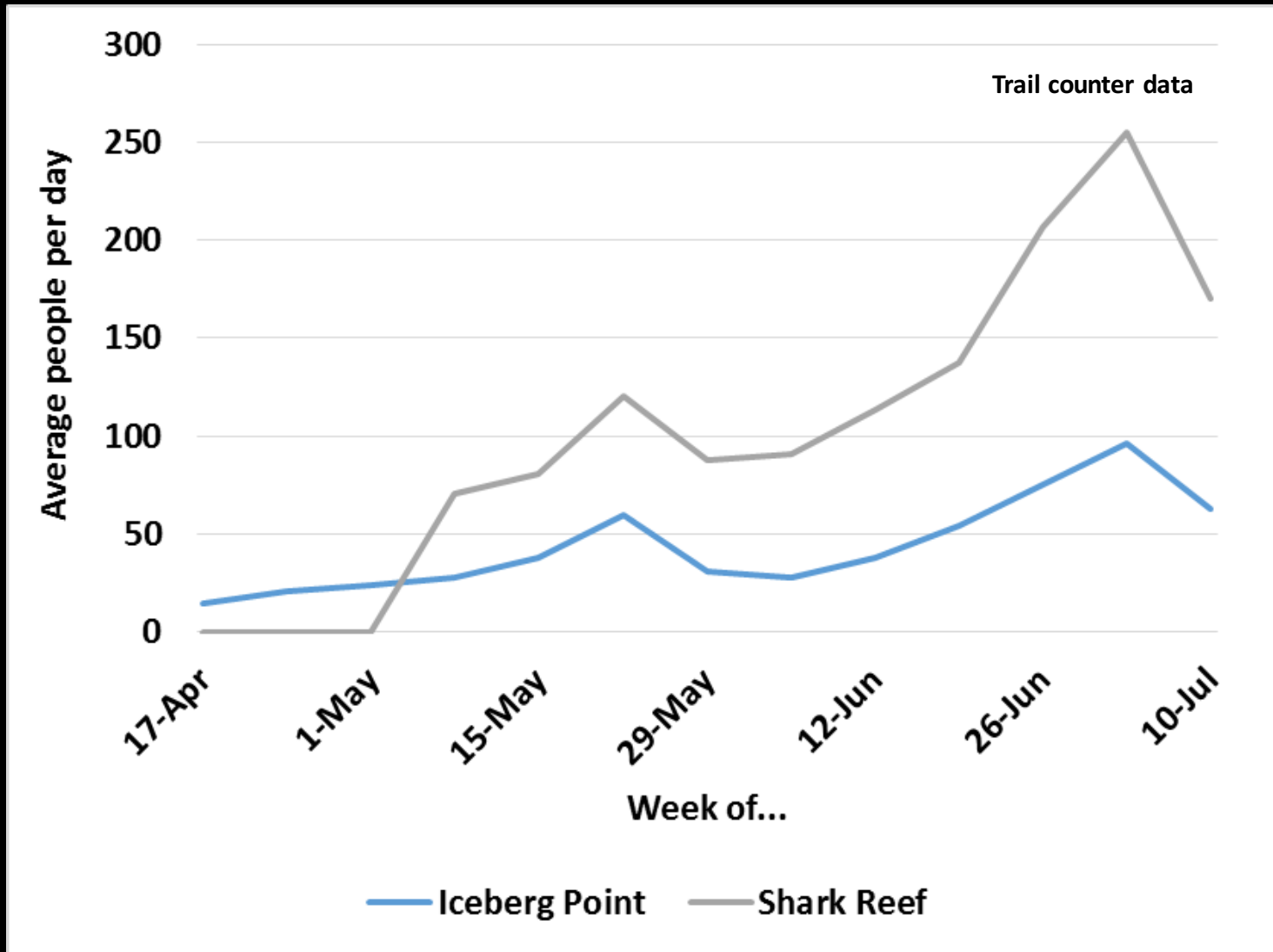
Most visited outdoor recreation sites on Lopez Island



Others listed:

- Lopez Village
- Mackaye Harbor
- Flat Head
- Marina
- Kayaking

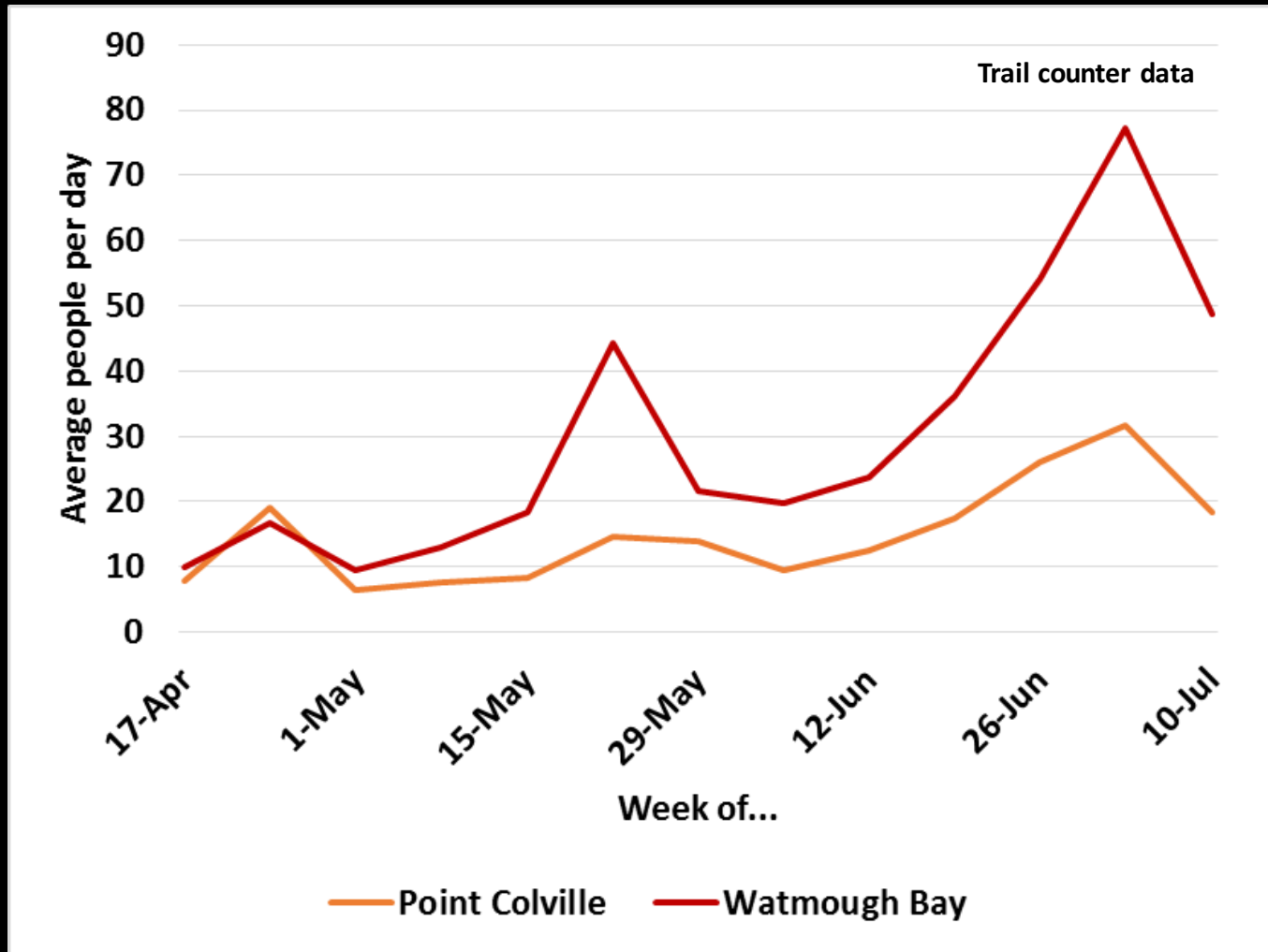
Lopez trail use – Iceberg and Shark Reef



Average 133 at Shark and 44 at Iceberg

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Lopez trail use – Watmough & Colville



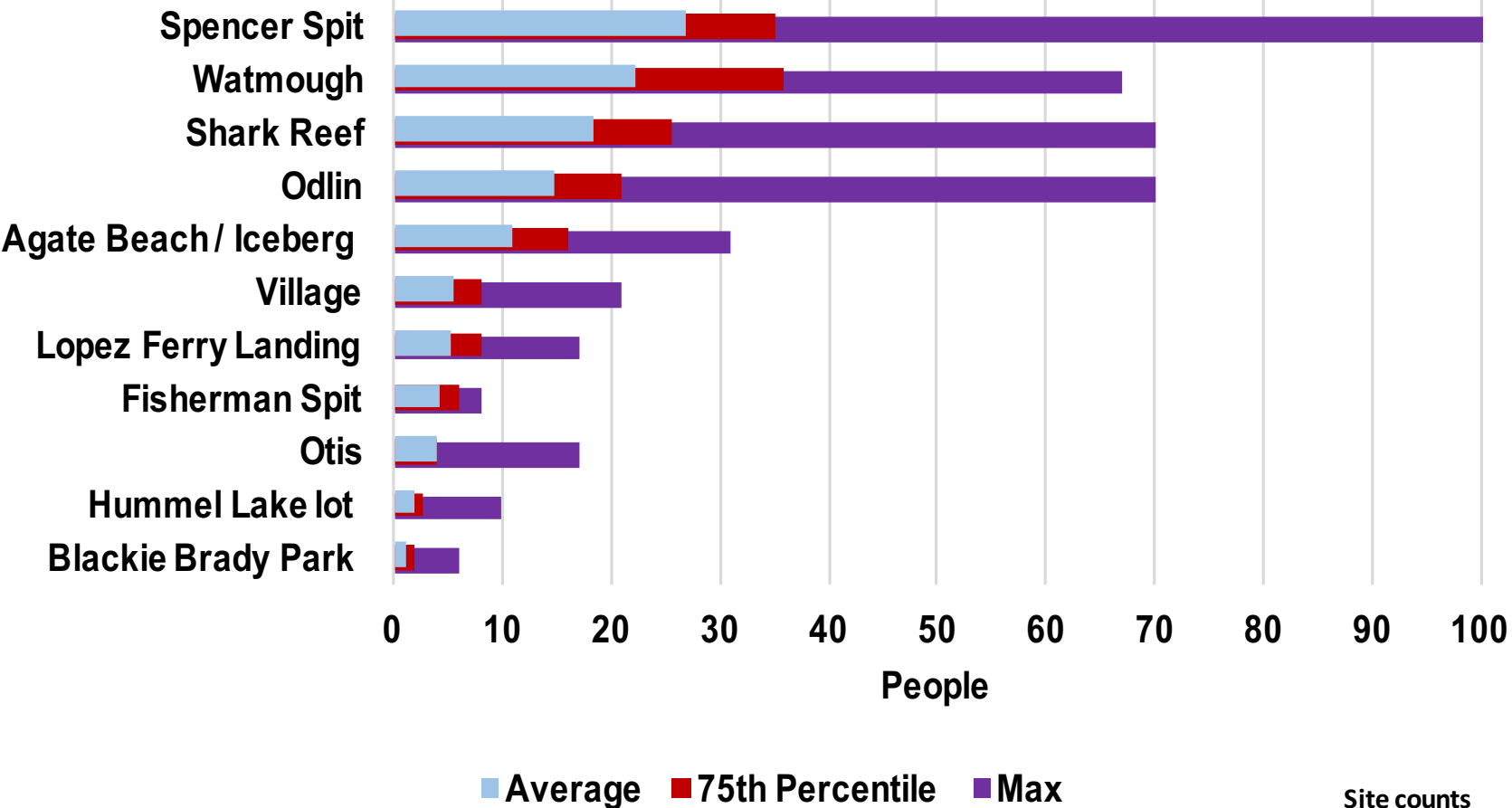
Average 30 at Watmough and 15 at Colville

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Conditions at sites
Onsite and ferry surveys

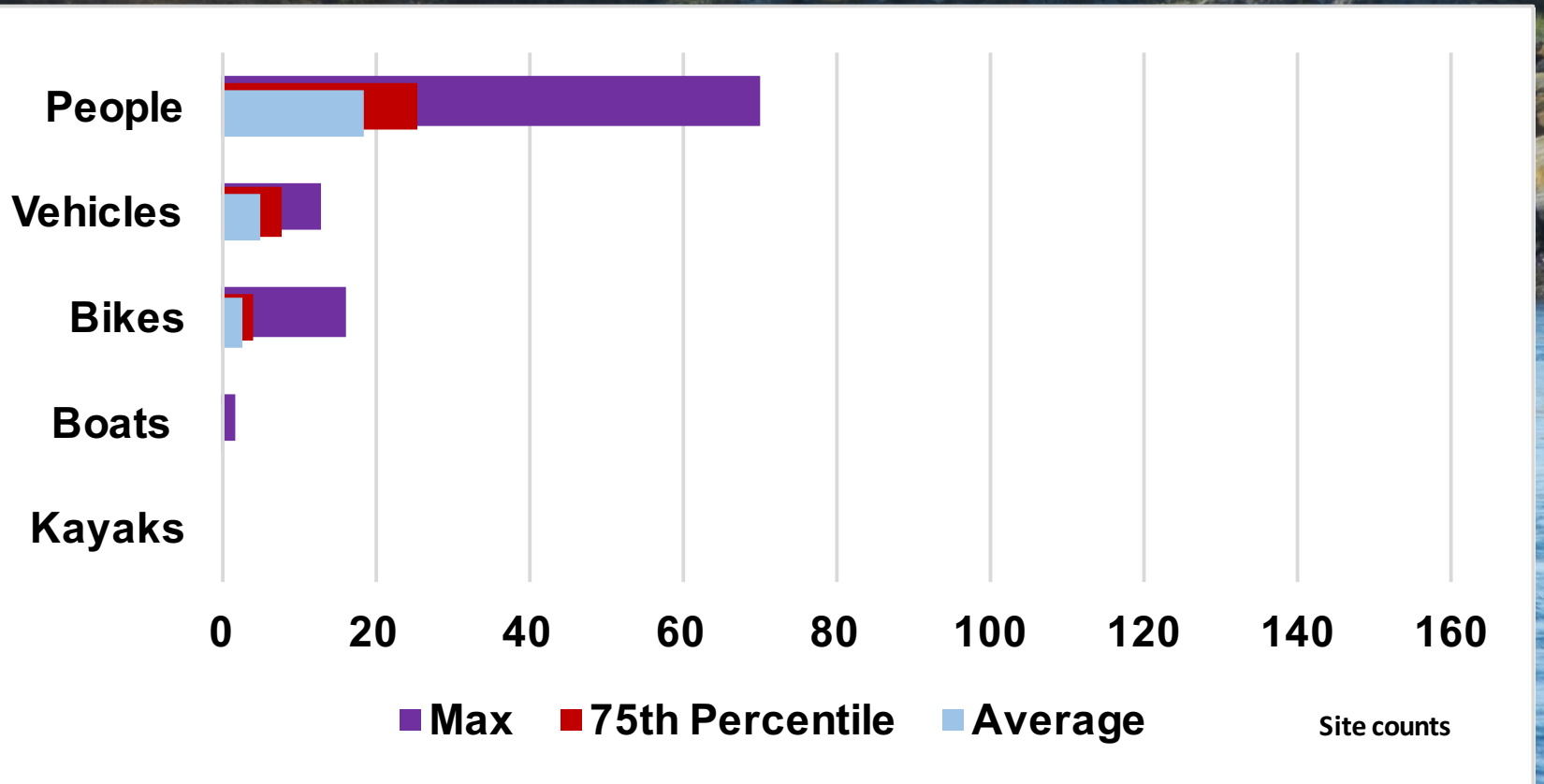


Lopez Island All Sites

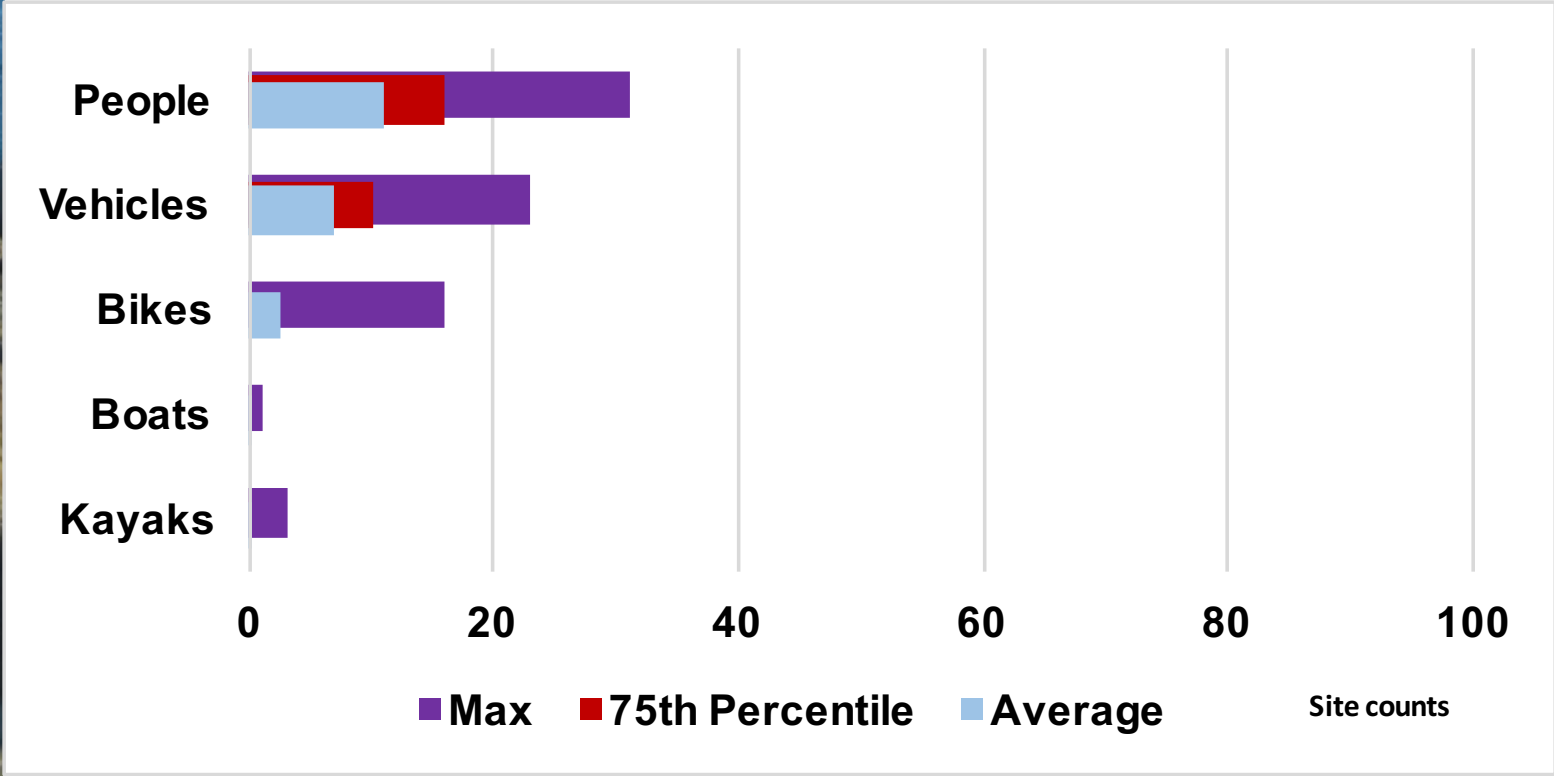


Site counts

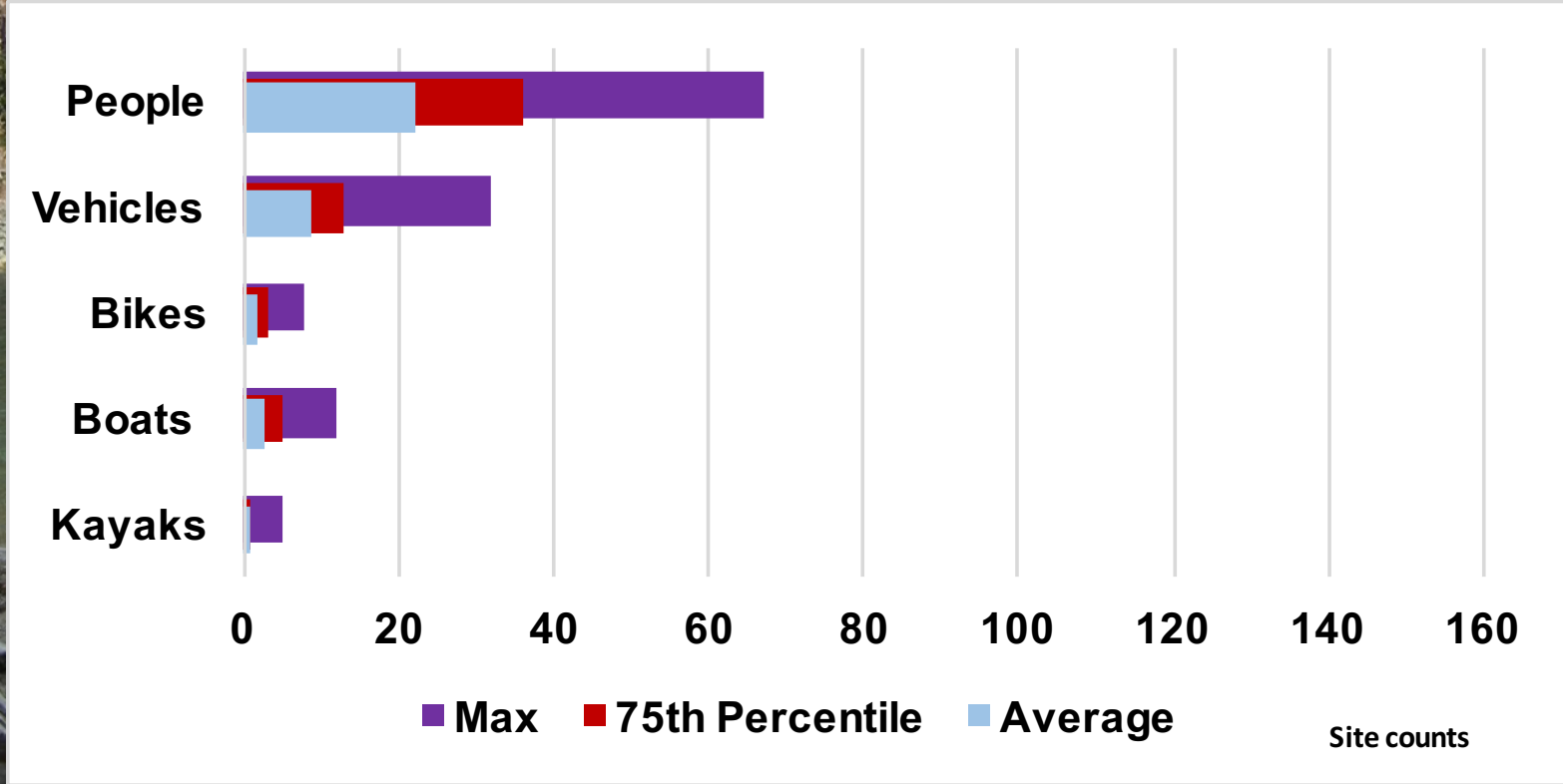
Lopez Island Shark Reef



Lopez Island Iceberg/Agate

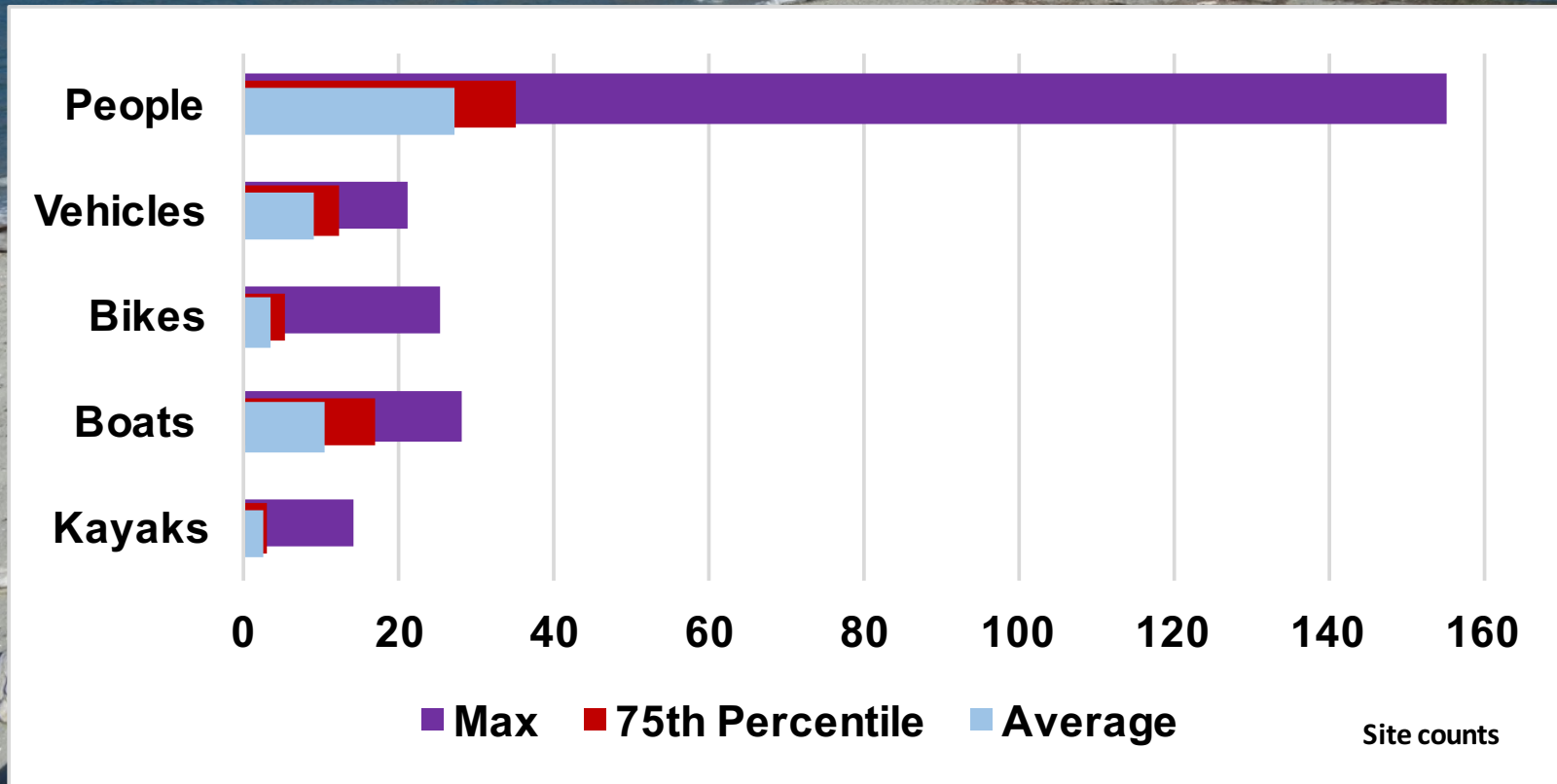


Lopez Island Watmough



Site counts

Lopez Island Spencer Spit



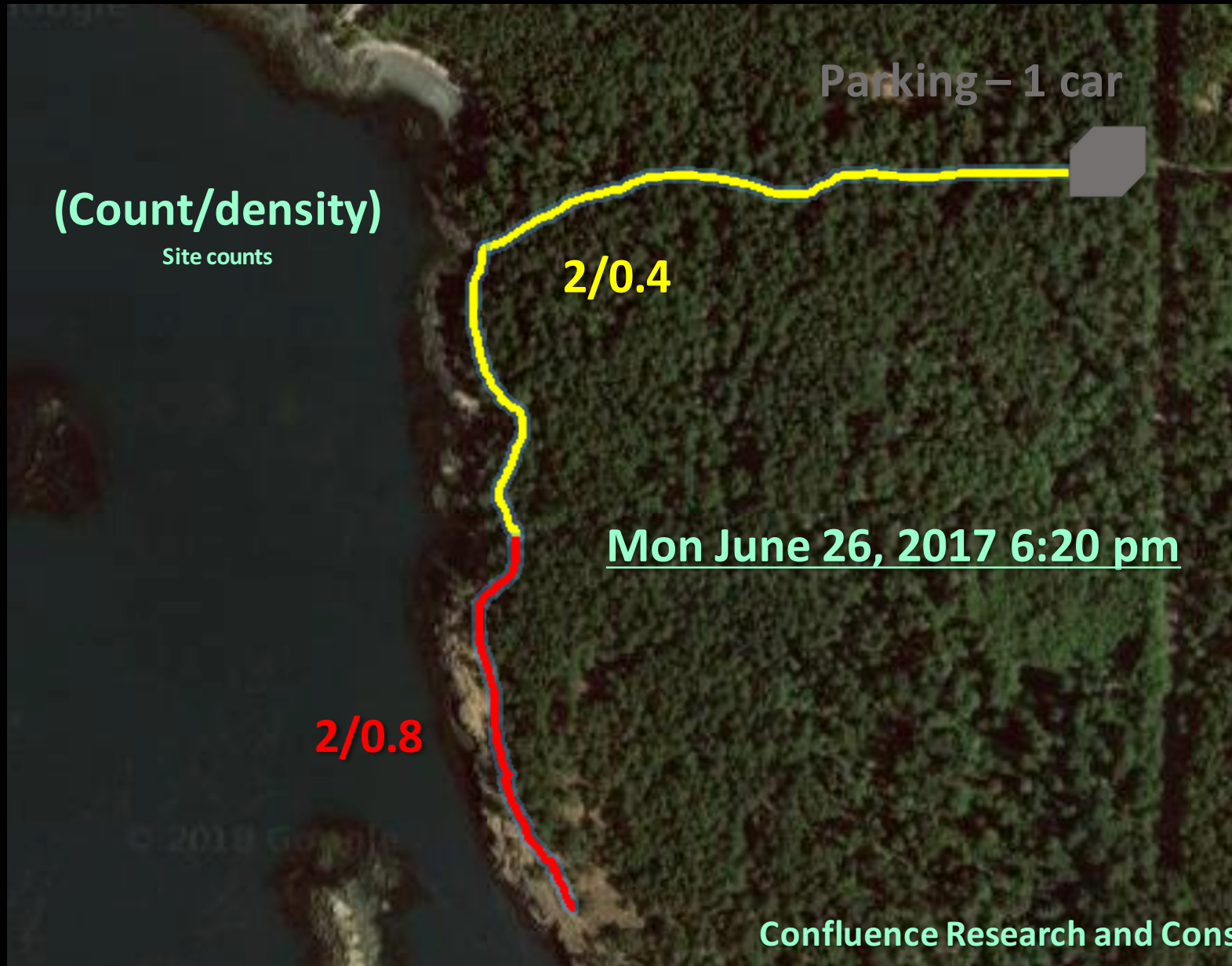
Shark Reef use densities – people per 100 yards of trail



Shark Reef use densities – people per 100 yards of trail



Shark Reef use densities – people per 100 yards of trail



Crowding

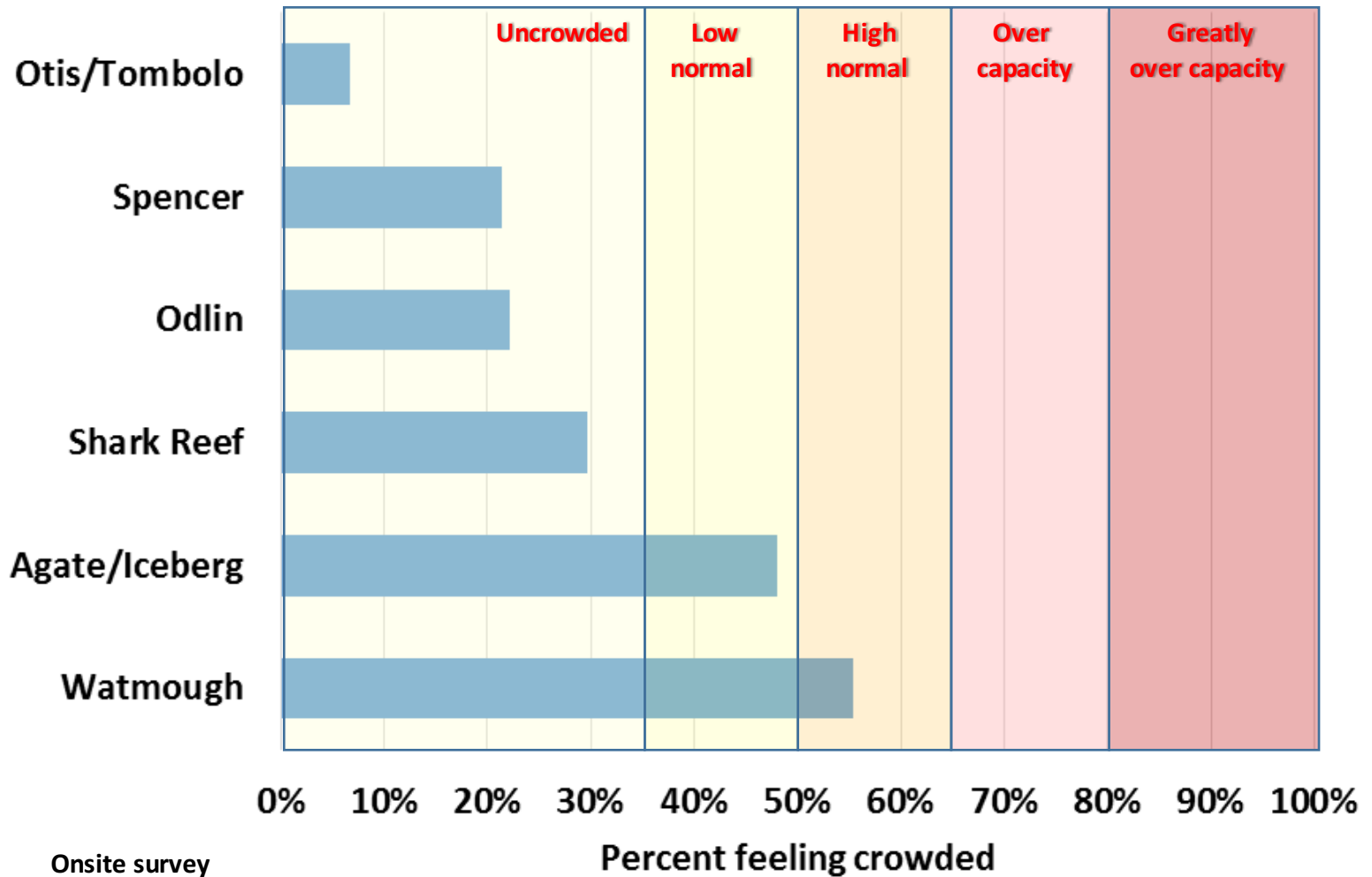
**“How crowded did you feel
in the following locations during your visit?”**

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

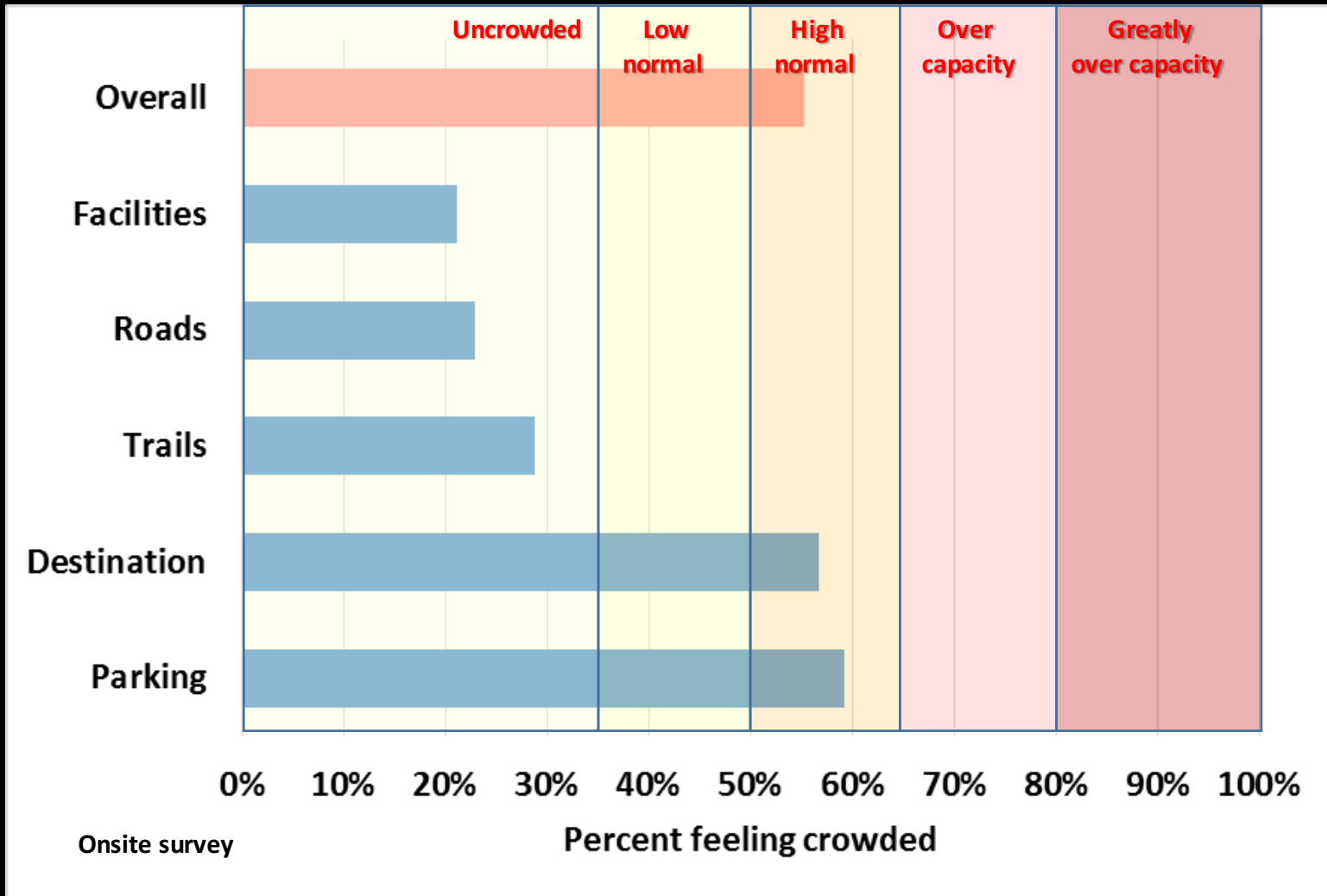
**Percent reporting 3 or higher (some degree of crowding) for
all locations shown in following graph...**

“Rule of thumb” indicator of capacity...

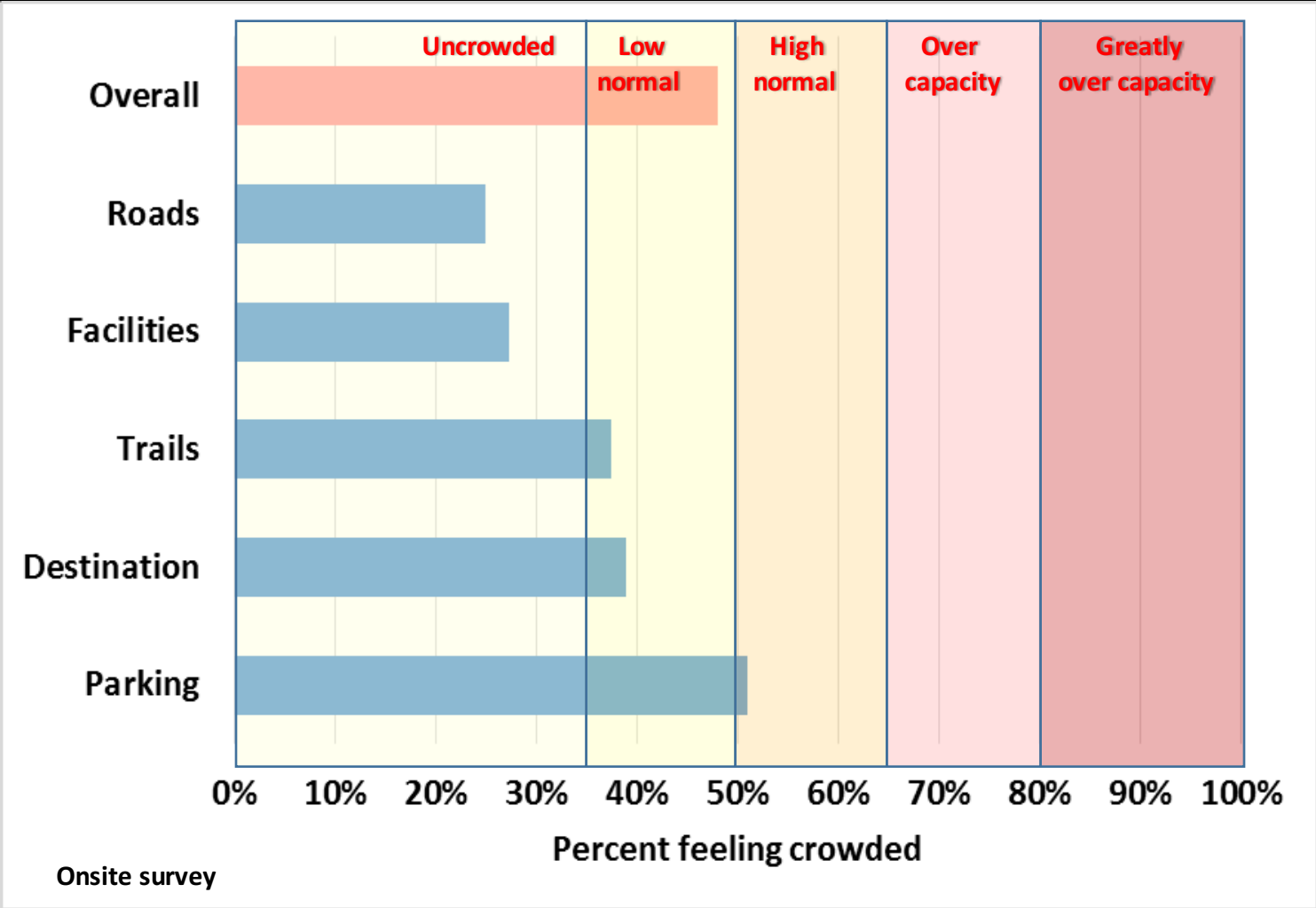
Lopez Island – Percent feeling crowded at sites (overall)



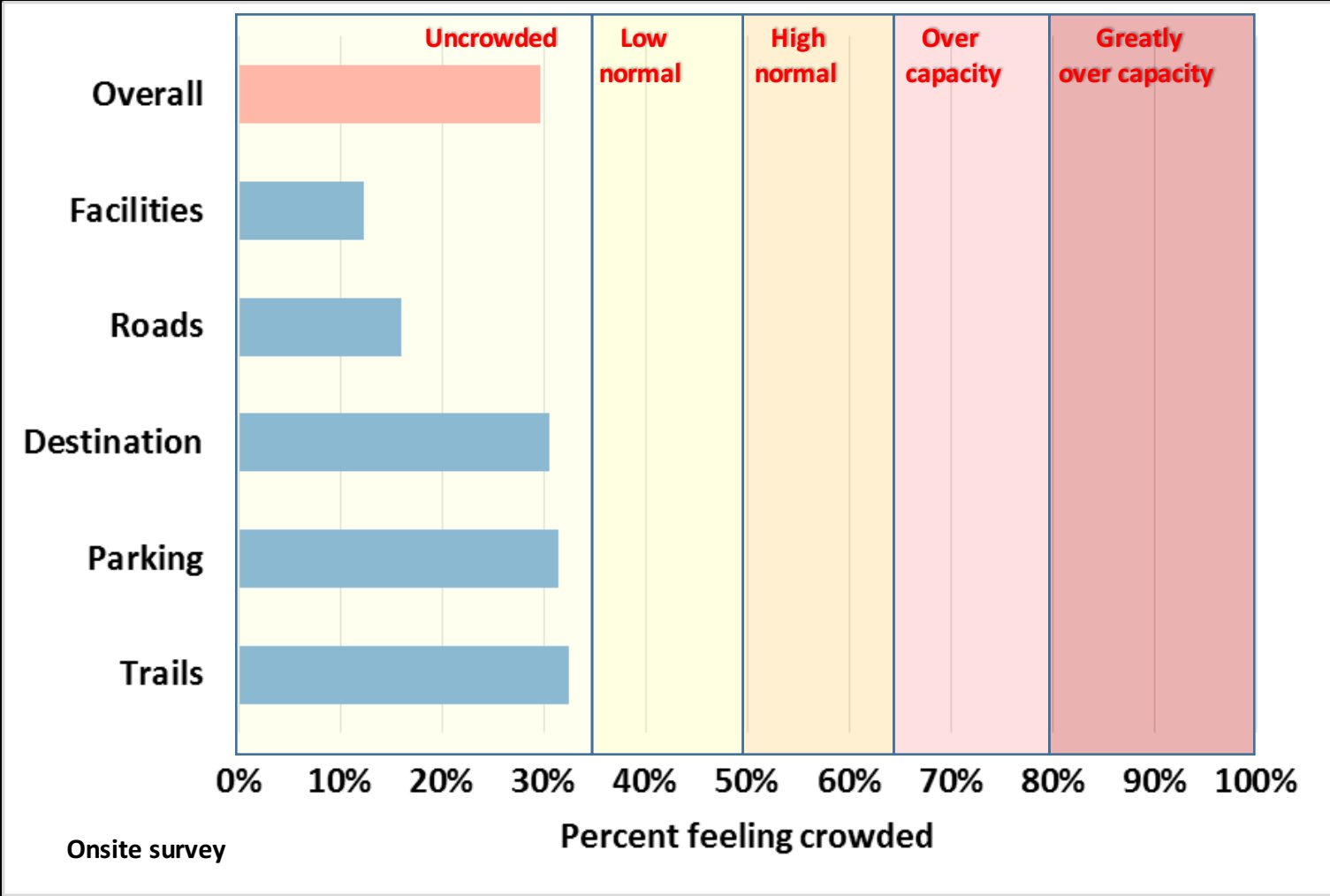
Lopez Island – Percent feeling crowded at Watmough



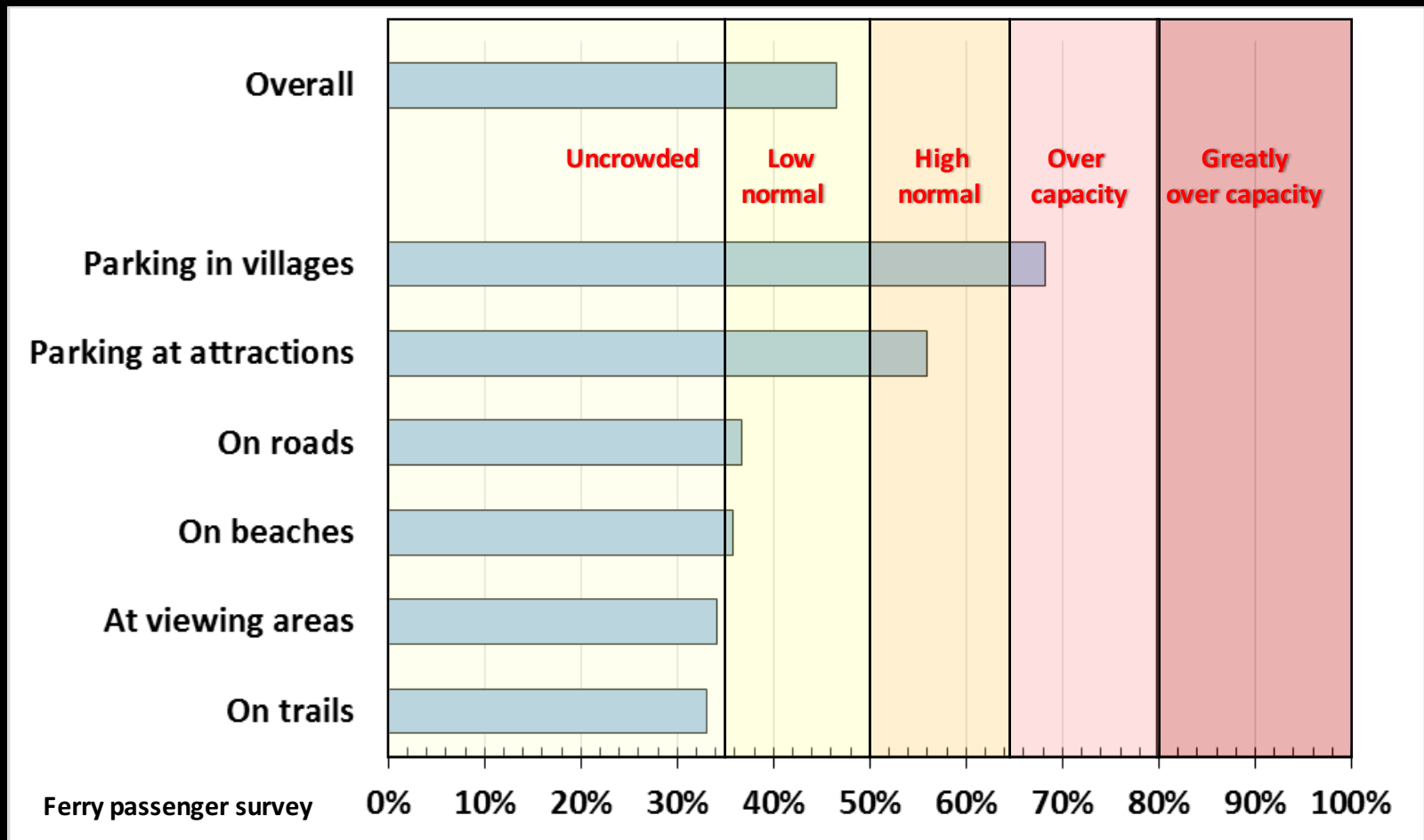
Lopez Island – Percent feeling crowded at Agate/Iceberg



Lopez Island – Percent feeling crowded at Shark Reef

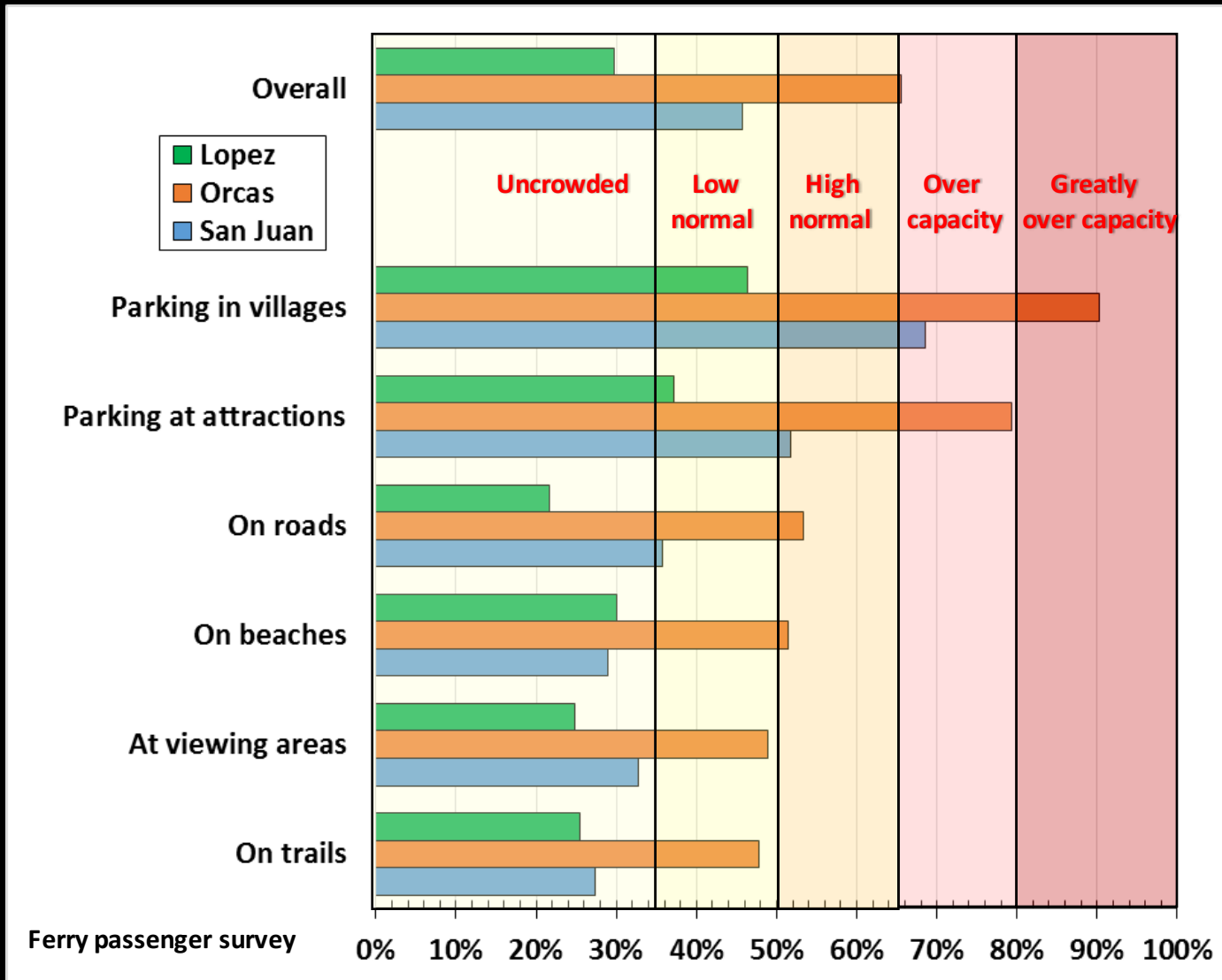


Percent of ferry visitors feeling crowded (all islands)



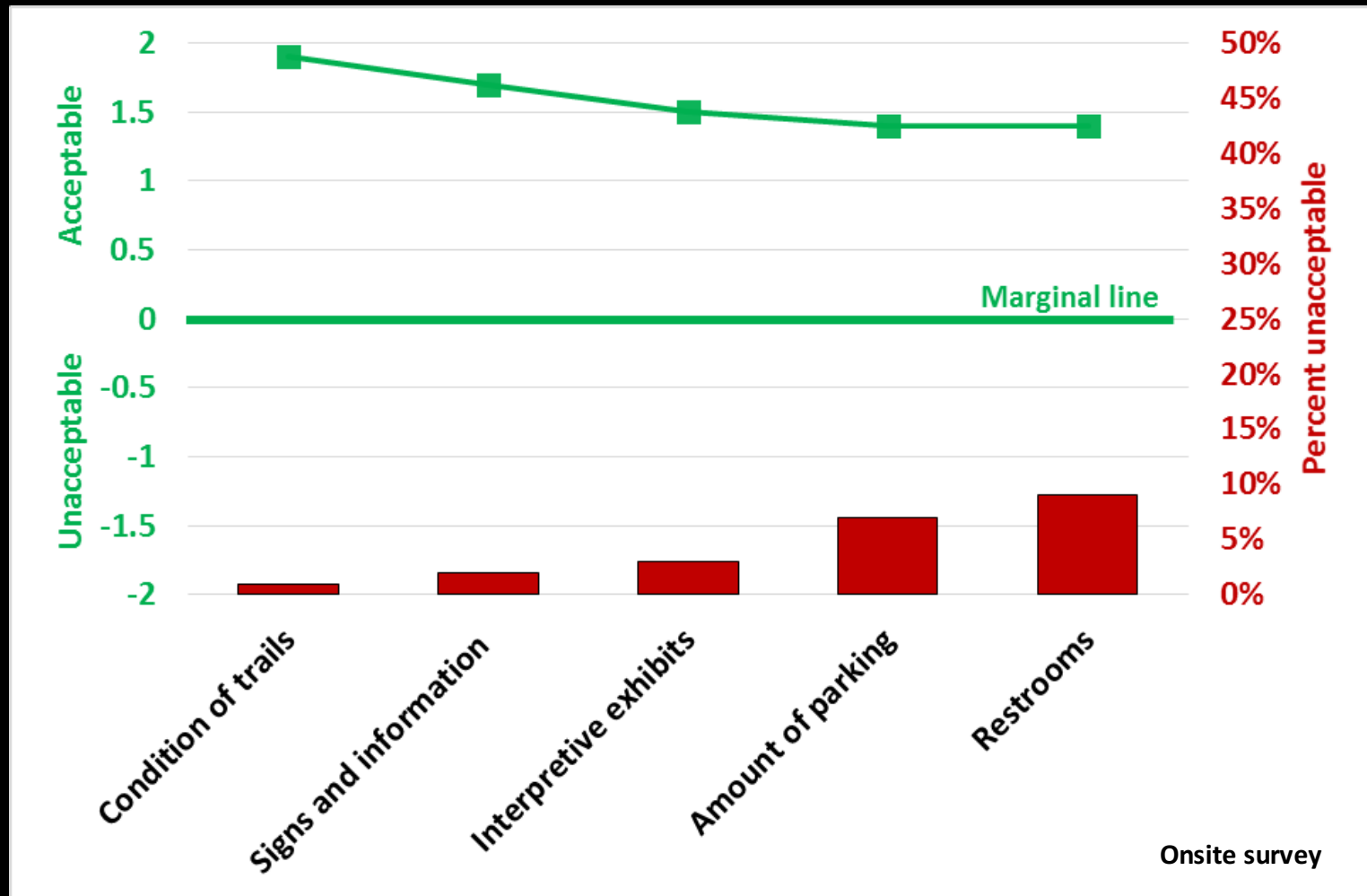
**When parking their vehicles...especially in villages (over capacity)
Less crowding at destinations or while traveling**

Percent of ferry visitors feeling crowded – comparing islands



- 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

Lopez Island – Rating conditions and facilities (all sites)



Lowest ratings: Restrooms at Otis/Tombolo (-0.6), Watmough (0.9)
Parking at Watmough (1.0), Agate (1.2), Otis/Tombolo (1.2)
Interpretation at Otis/Tombolo (0.5), Shark Reef (1.3)

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

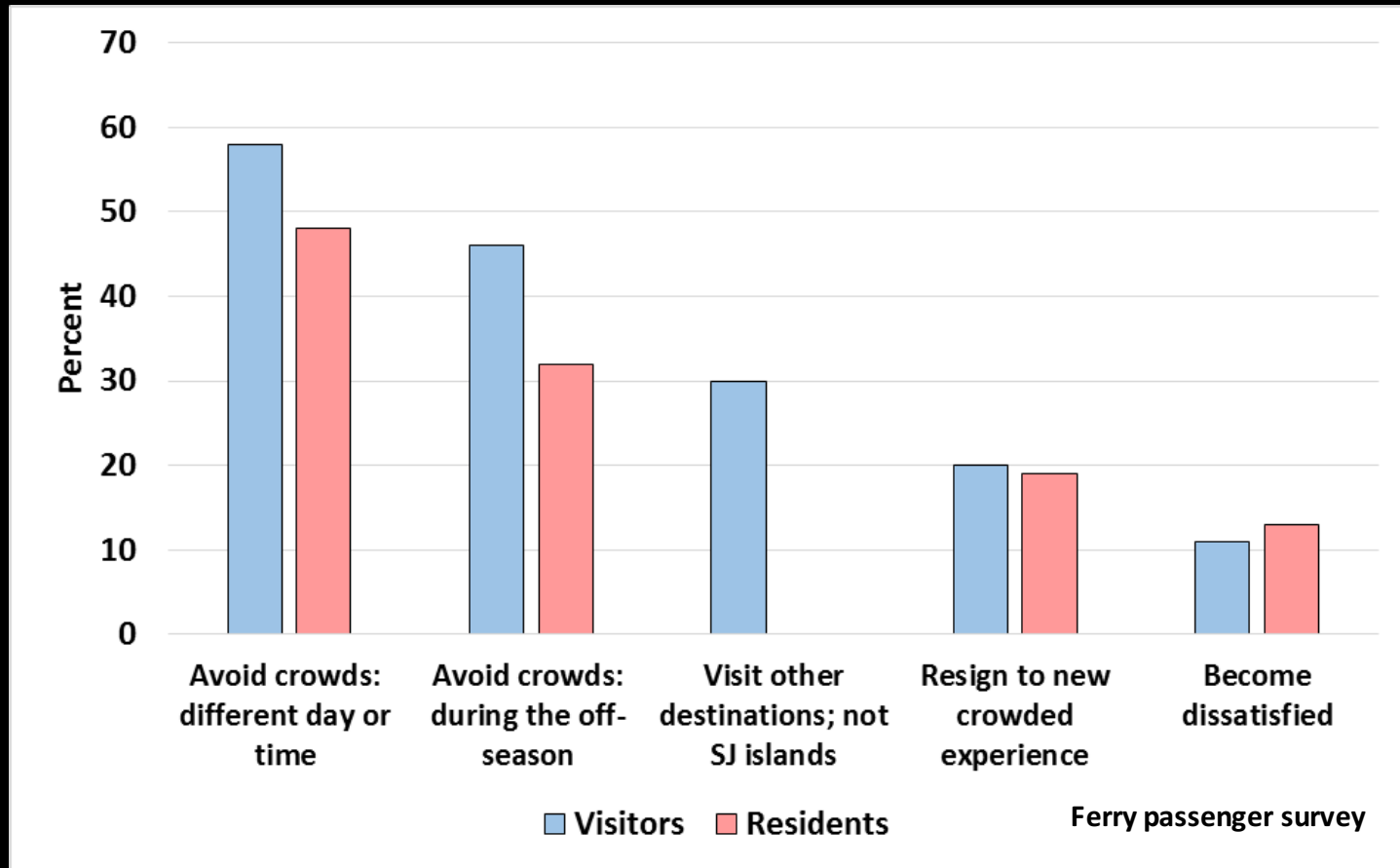
- Resign myself to the new more crowded or congested experience.
- Try to avoid crowds or congestion by visiting villages or attractions at a different day of the week or time of day.
- Try to avoid crowds or congestion by visiting villages or attractions during the off-season.
- Become dissatisfied.
- 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%)



Confluence Research and Consulting

Evaluations of use levels

Ferry survey

Beach Photos

©CRC

Photo A



Photo B



Photo C



Photo D



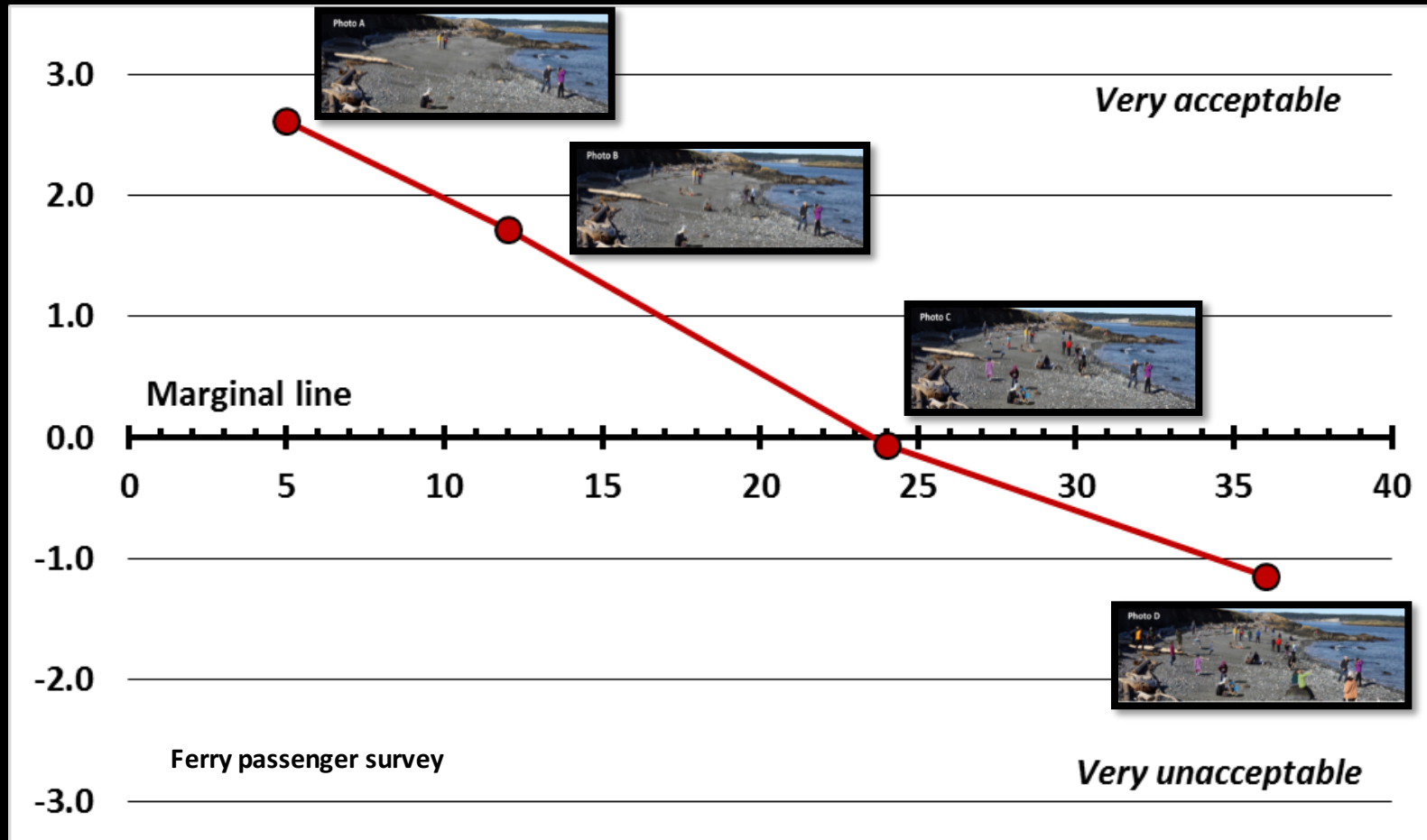
Evaluating use at
beaches

Ferry survey

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

Confluence Research and Consulting

Evaluating beach densities: All respondents



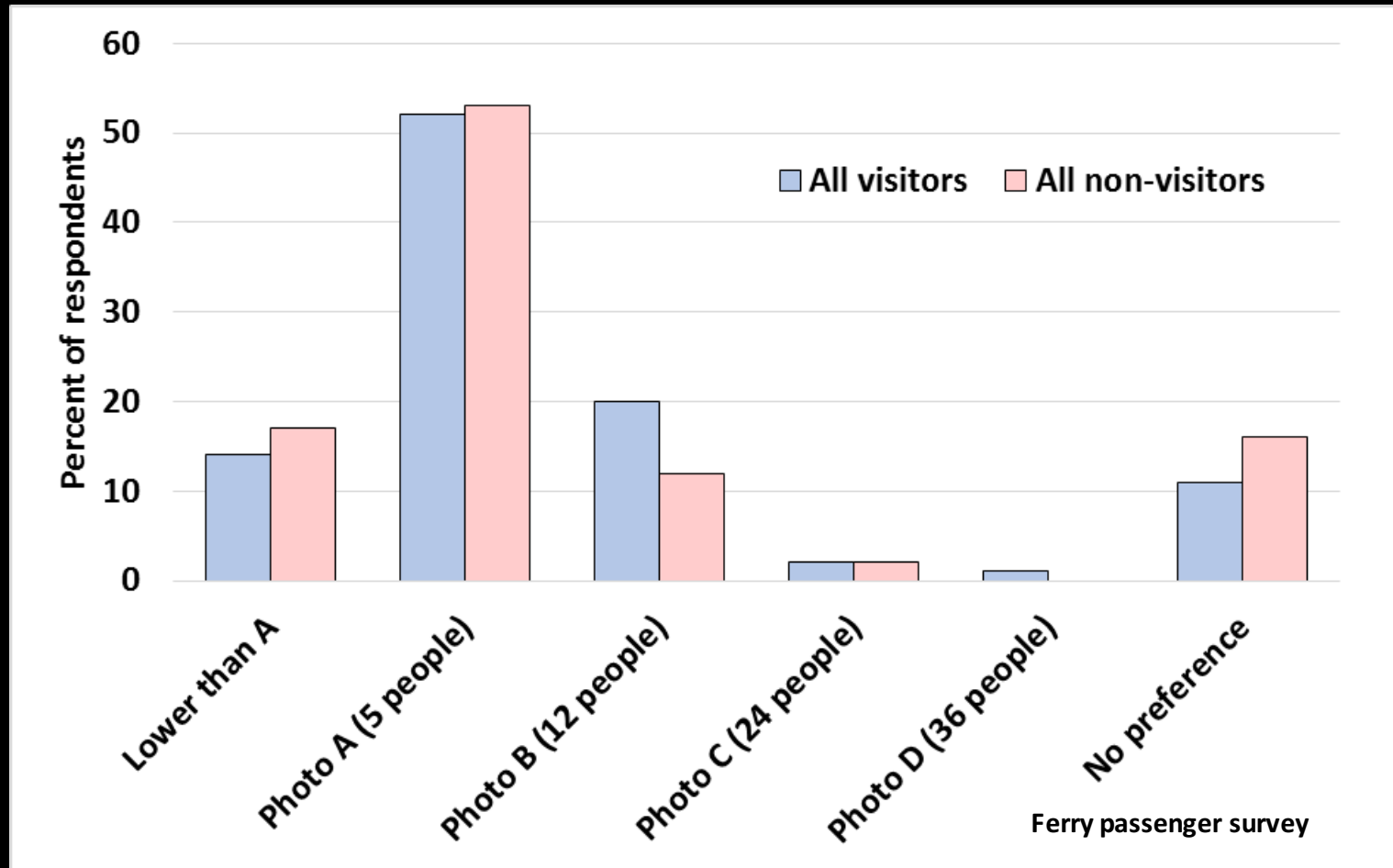
5 and 12 people acceptable; 24 at margin; 36 clearly unacceptable

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



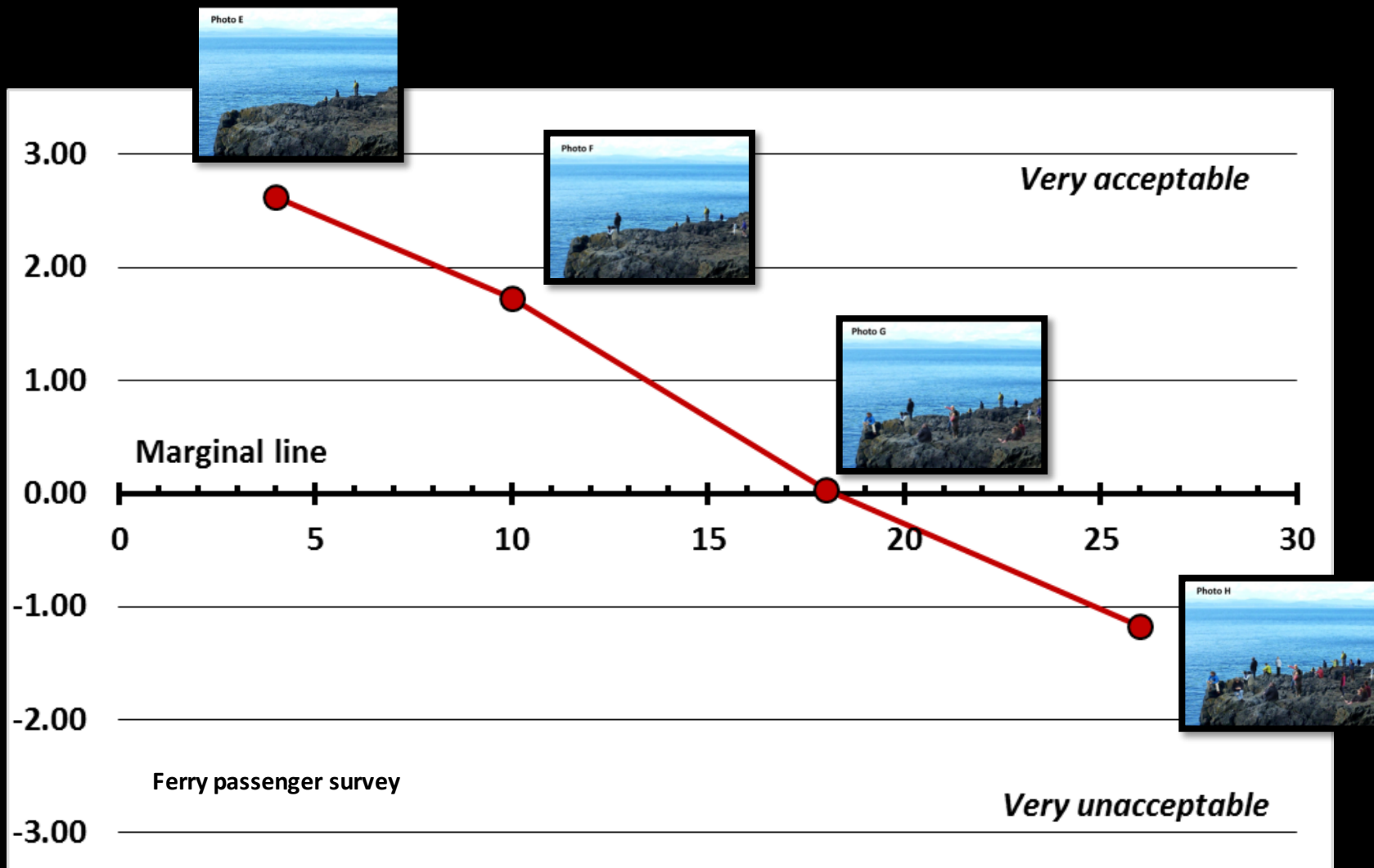
Photo H



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

Confluence Research and Consulting

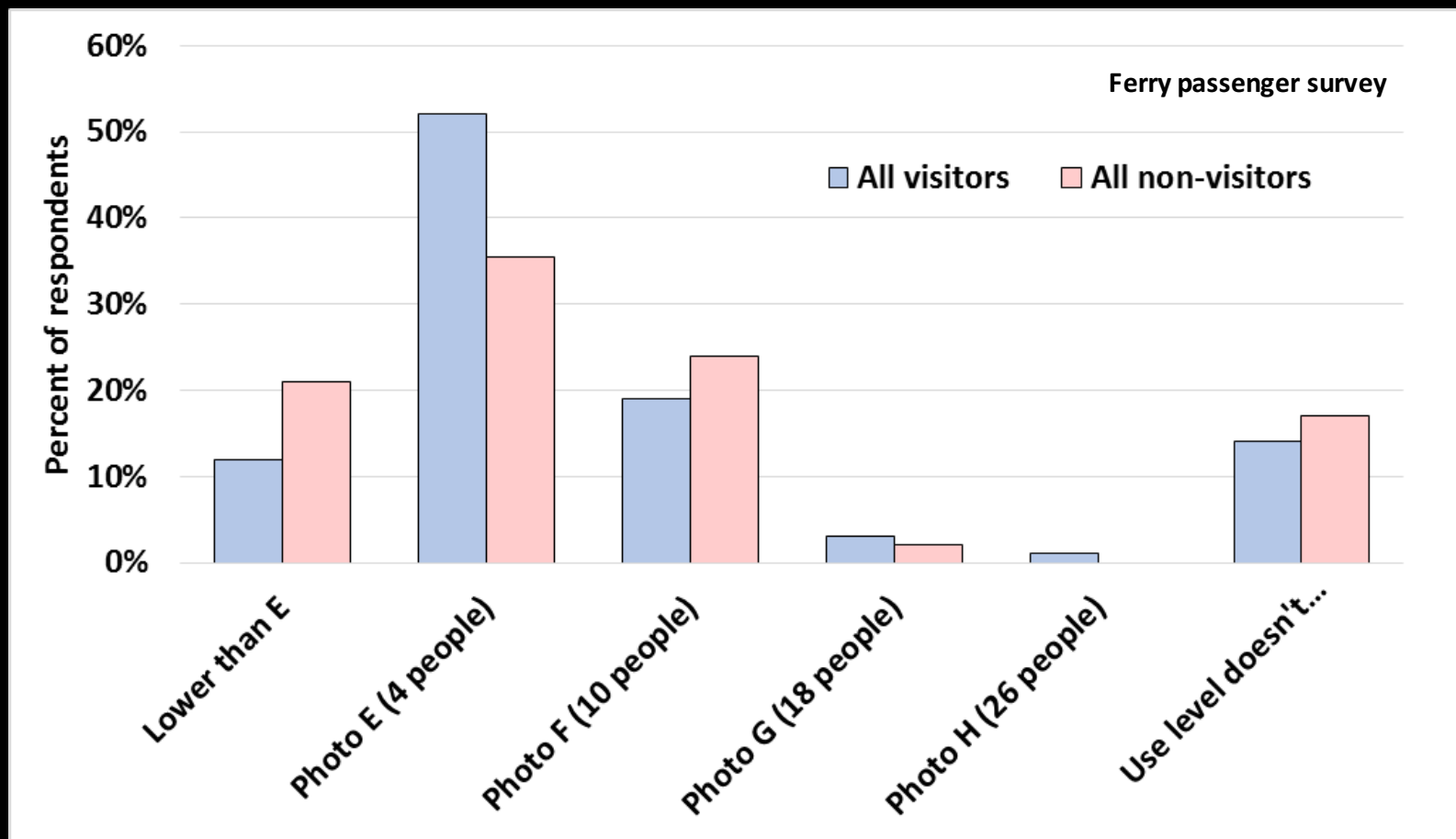
Evaluating marine viewing densities: All respondents



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
Confluence Research and Consulting

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

Confluence Research and Consulting

Support for management actions

Ferry survey

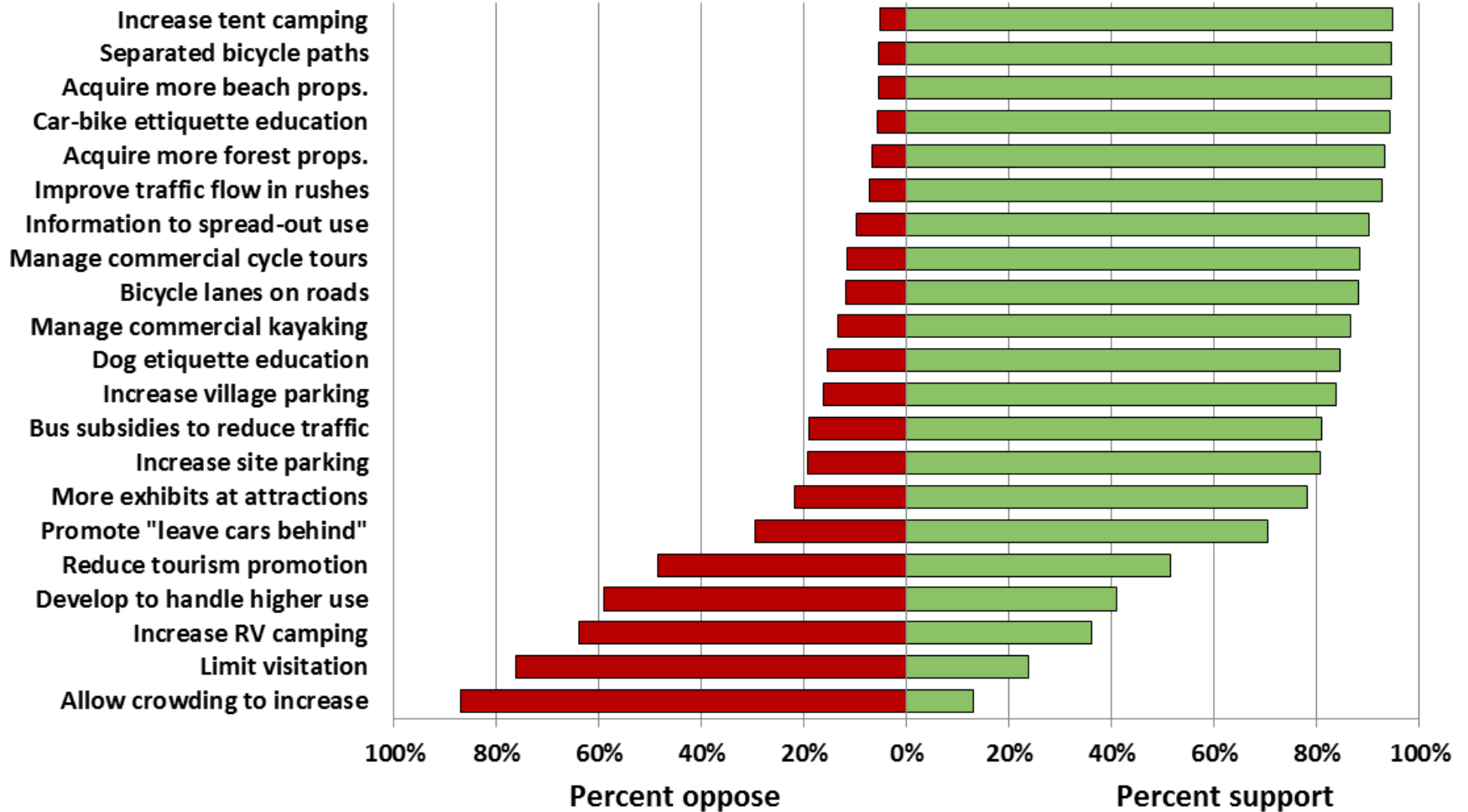
Support for management actions

21 different actions



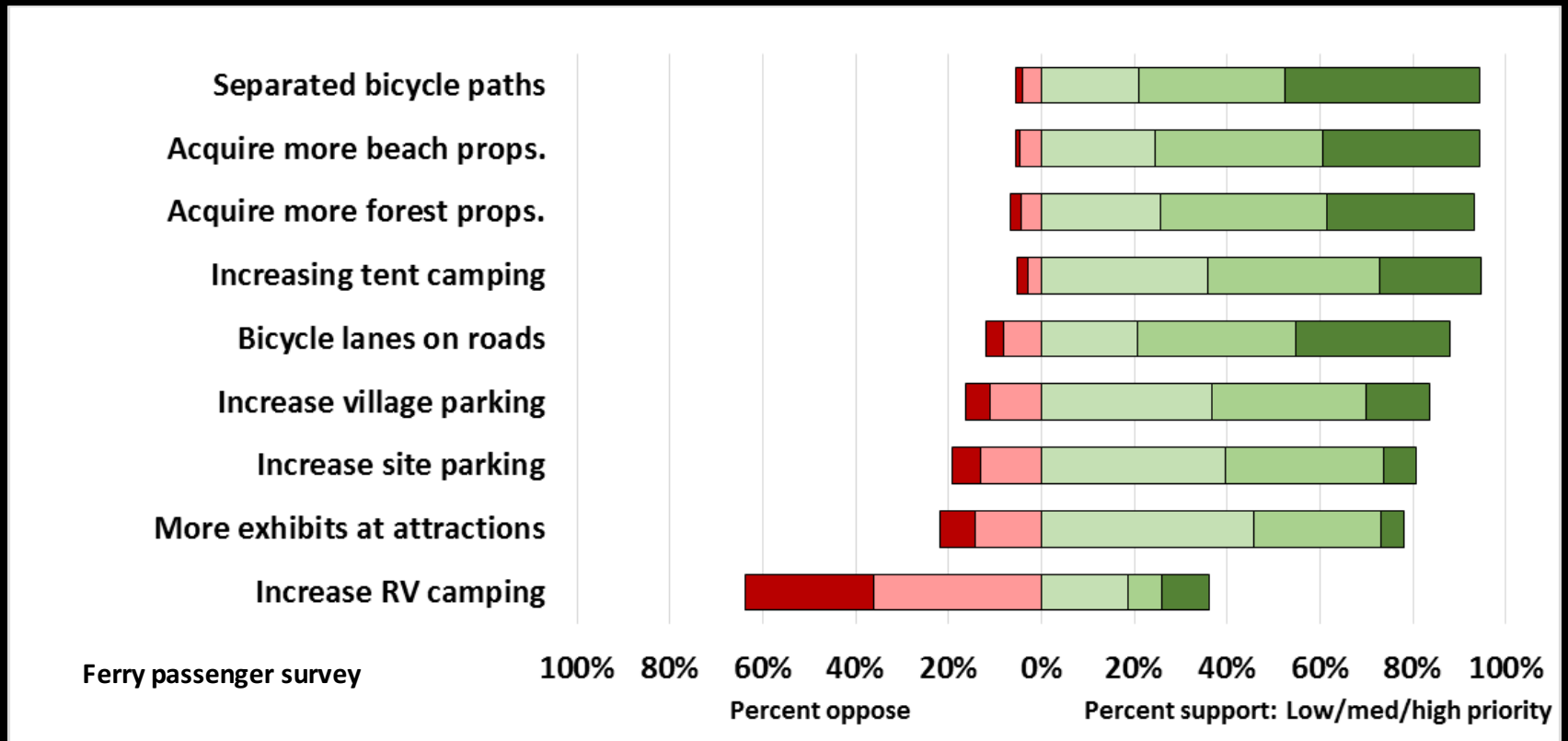
“Please tell us if you support or oppose the following actions that might be used to improve tourism in the San Juan Islands. If you support an action, identify whether it should be a low, medium, or high priority.”

Support for management actions among all visitors



Ferry passenger survey

Highest priority acquisition/infrastructure actions among visitors



More public land – shore > forest/mountain properties

Separated bicycle lanes > roadside bike lanes

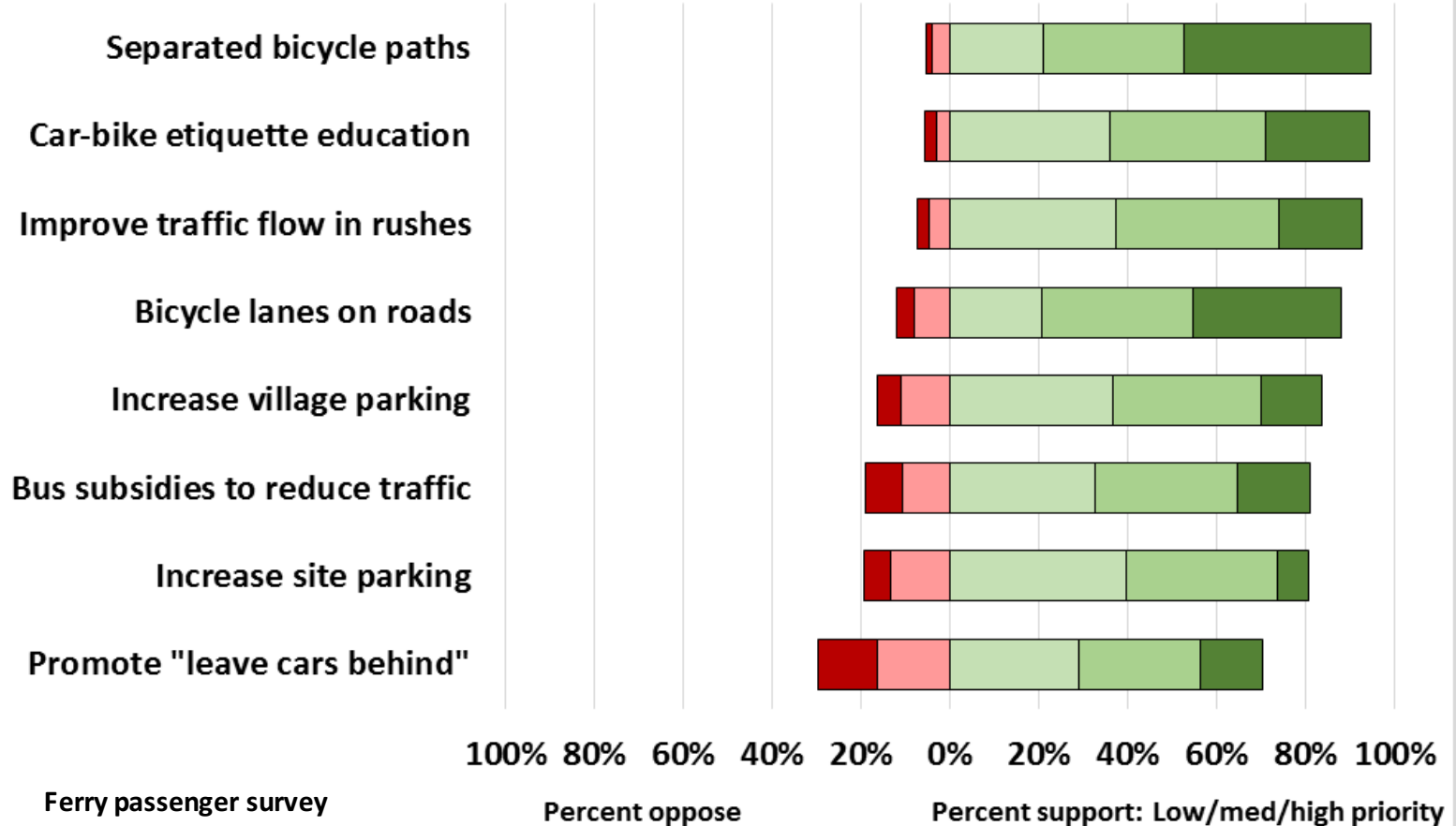
Village parking > site parking

More camping

Interpretive exhibits are lower priority

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Highest priority transportation actions among visitors



Visitors support them all

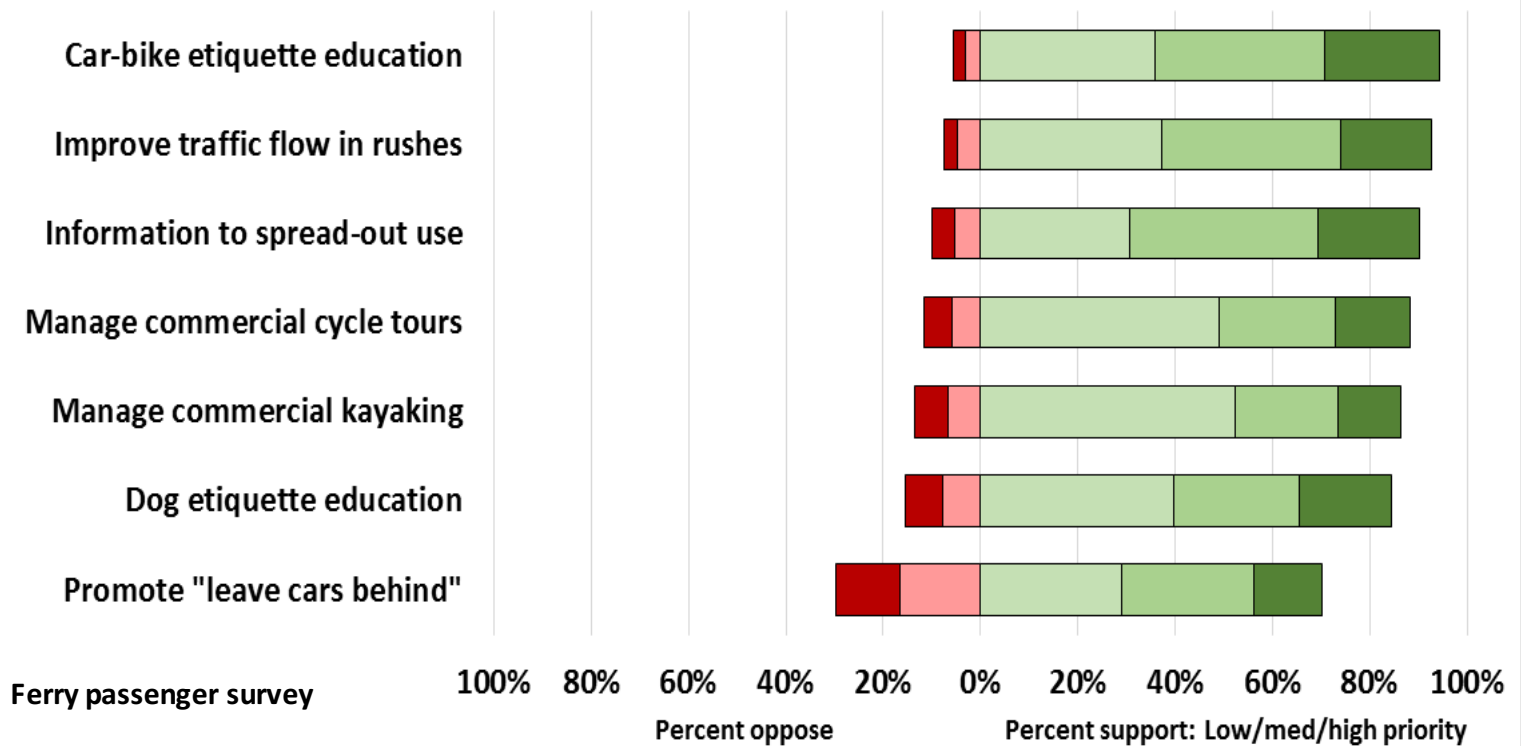
Separated bike paths > etiquette > bicycle lanes on roads

Improve traffic management in ferry rushes

Village parking > site parking

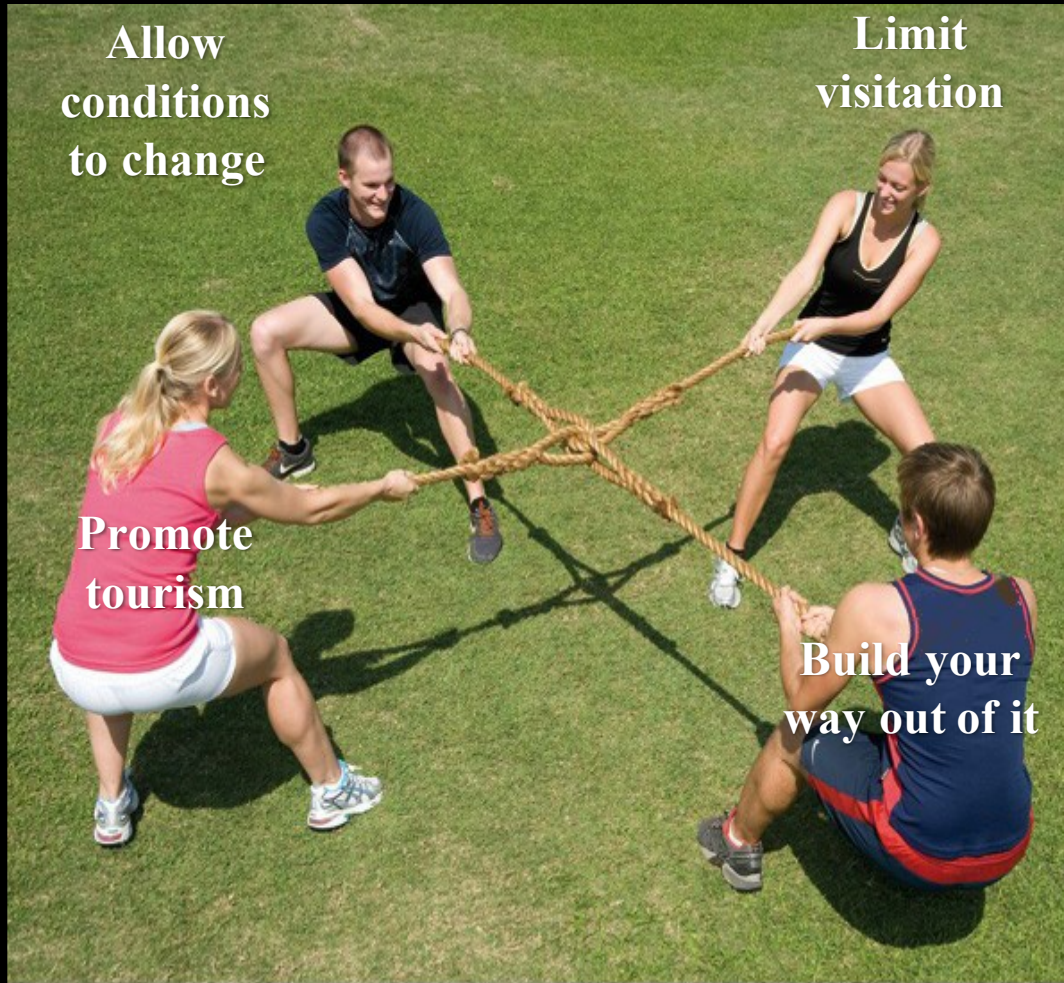
Bus subsidies > "leave cars behind"

Highest priority education actions among visitors

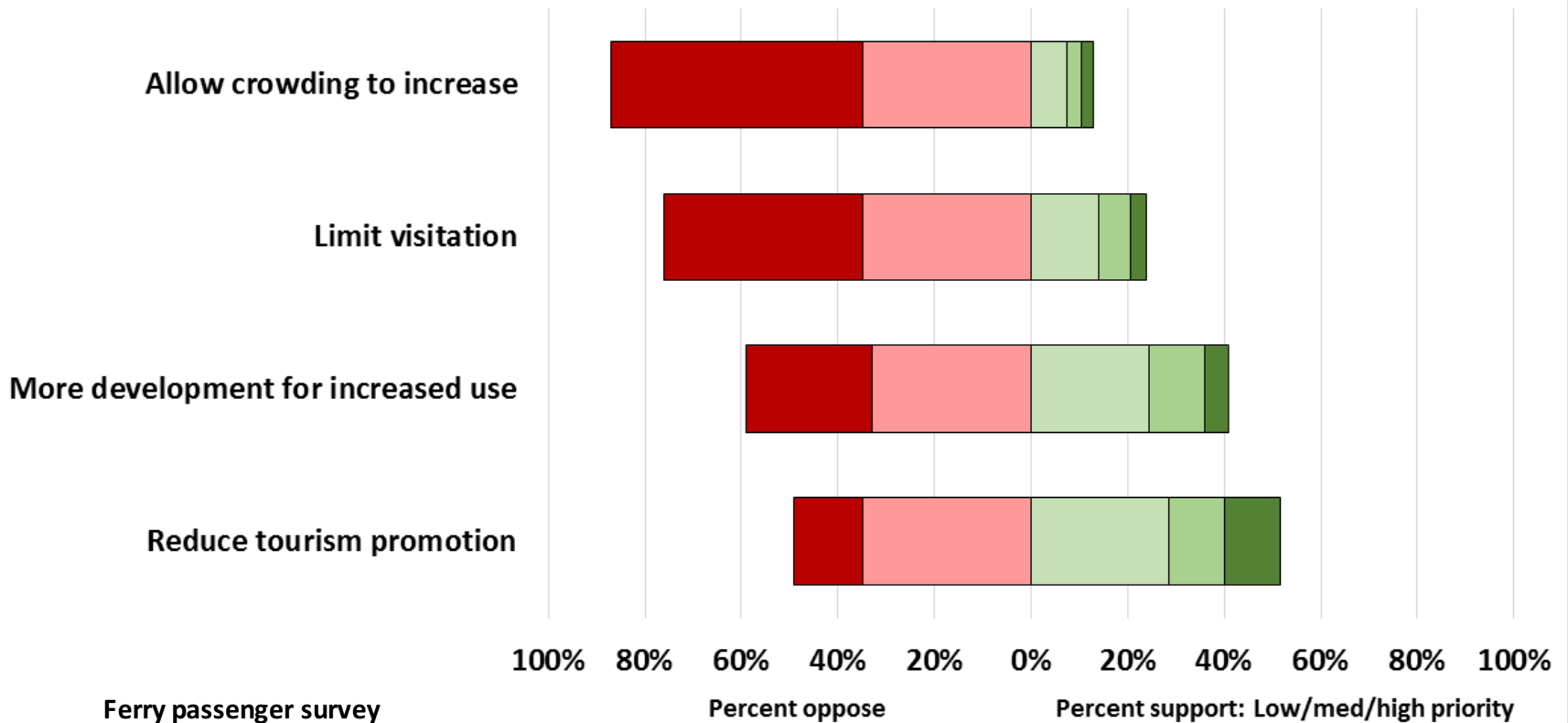


Visitors support them all
Lowest priority is promote "leave cars behind"

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

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