

Findings from the San Juan Islands Visitor Study for San Juan Island

Presented on Wednesday, February 28th
at San Juan Island Library in Friday Harbor, WA



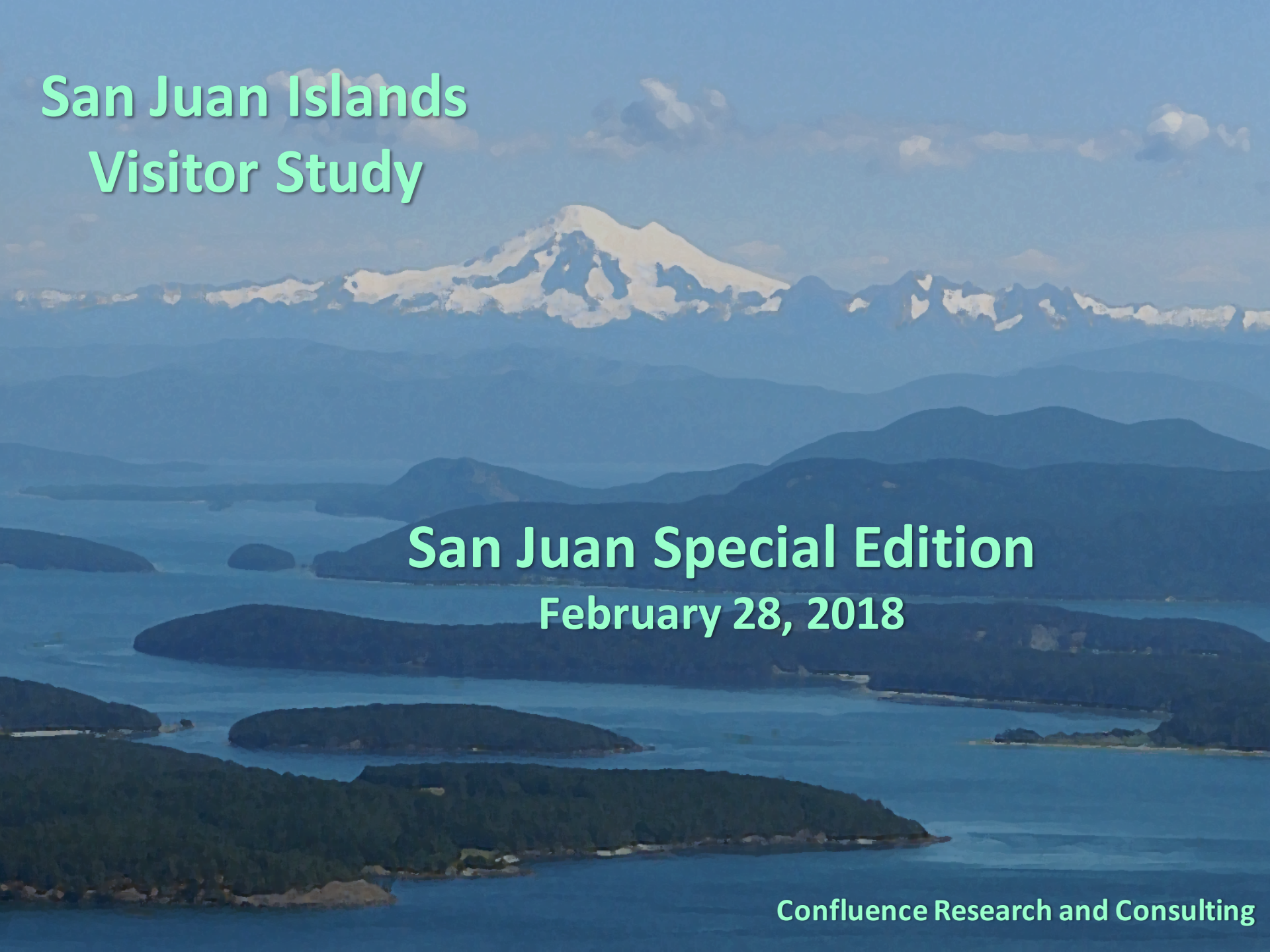
Confluence Research and Consulting

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San Juan Islands Visitor Study

San Juan 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

A photograph of a pebbly beach with two people walking along the water's edge. The water is a deep blue, and the sky is clear. The people are walking from left to right. 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 beach is covered in small, dark pebbles and some seaweed. The water is calm with small ripples.

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, etc.
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 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 viewpoint Preserve	<input type="checkbox"/> Light House / ferry landing
<input type="checkbox"/> Fourth of July Beach and trails	<input type="checkbox"/> Timberack Mountain trails	<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"/> Hummel 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"/> Shawk Reef Sanctuary
<input type="checkbox"/> Historical Scenic Preserve overlooks	<input type="checkbox"/> Cascade Lake in Moran State Park	<input type="checkbox"/> Lopez Beach Sanctuary
<input type="checkbox"/> County Park / Little State Park / Ullrich State Park	<input type="checkbox"/> All Constitution in Moran State Park	<input type="checkbox"/> Volney Place
<input type="checkbox"/> Michael Park / Small Fox Cove	<input type="checkbox"/> Hiking trails in Moran State Park	<input type="checkbox"/> Wagonwheel Bay
<input type="checkbox"/> Young Hill trails	<input type="checkbox"/> Observation Pass State Park	<input type="checkbox"/> Cowles Point
<input type="checkbox"/> Eagle Camp gardens and buildings	<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____
<input type="checkbox"/> Roche Harbor trails		
<input type="checkbox"/> Reuben Tate 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 (with a guide)	<input type="checkbox"/> Bicycling with a bike group
<input type="checkbox"/> Kayaking / canoeing (with your boat or rental)	<input type="checkbox"/> Bicycling with your bike on a rented bike
<input type="checkbox"/> Canoe watching / sightseeing from your 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	
<input type="checkbox"/> Other _____	

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

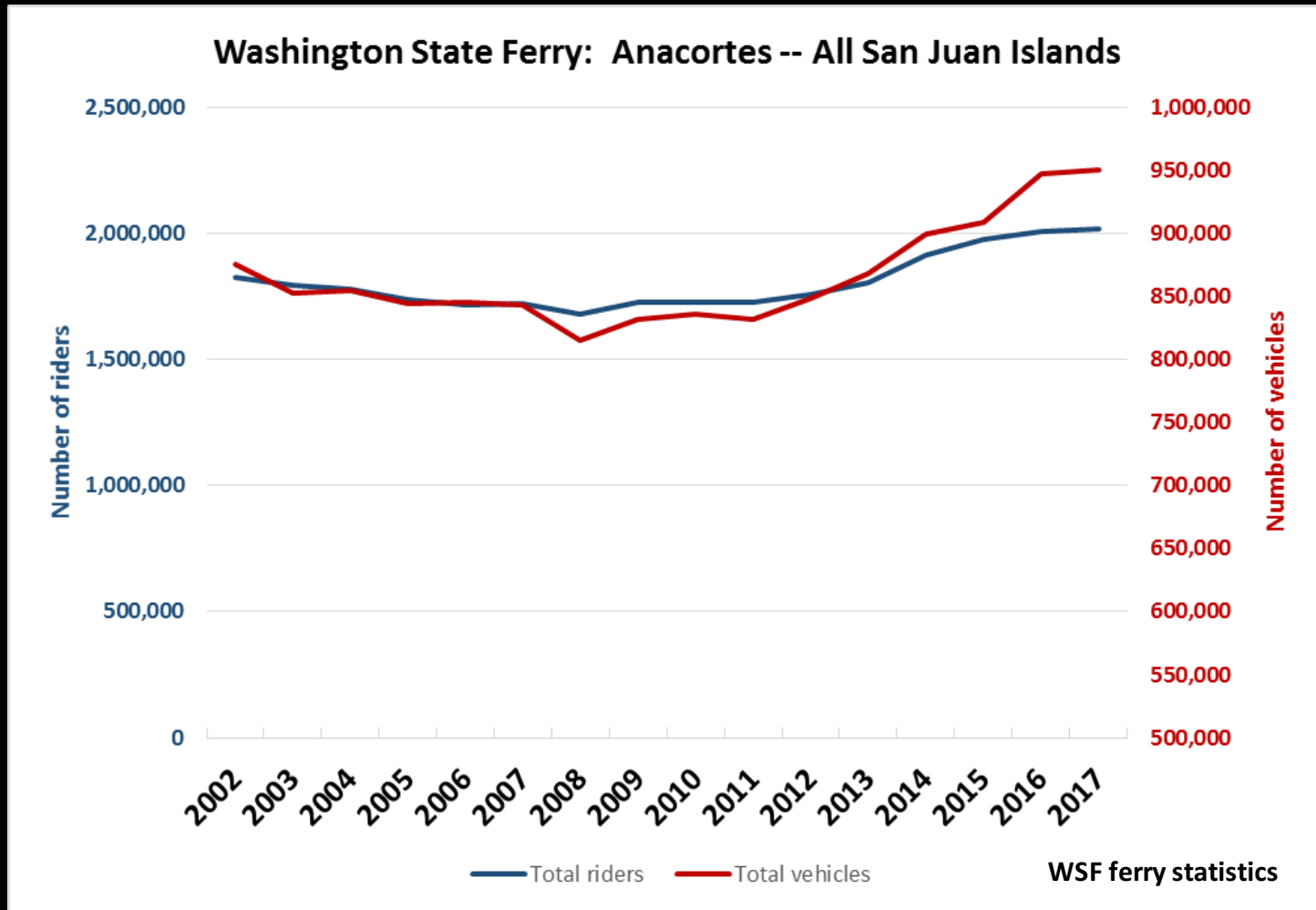
141 residents/other

Getting to the islands

WSF stats , web-information, & interviews

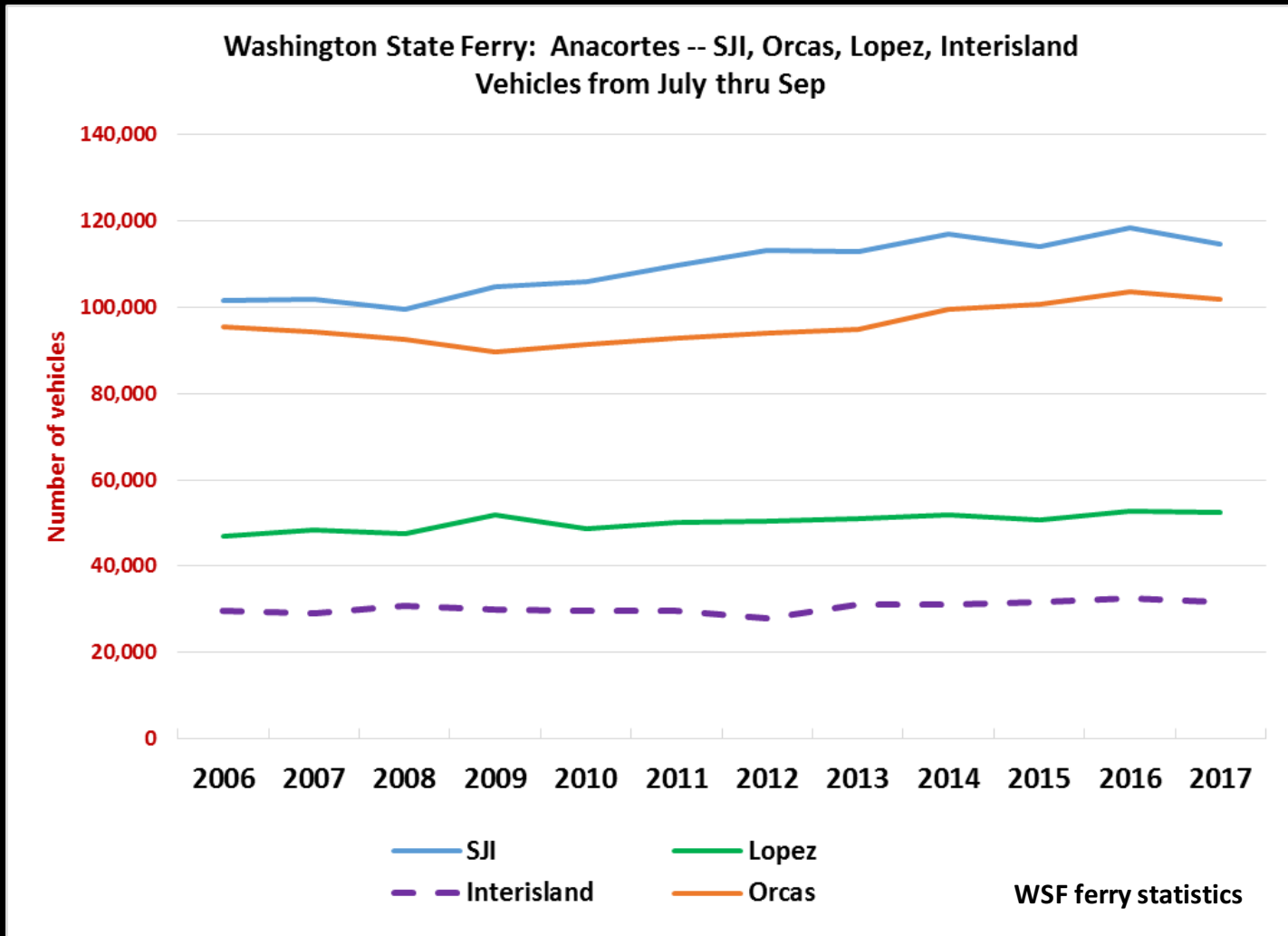


Long term year-round WSF trends – all islands Riders and vehicles



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

Long term summer WSF vehicle trends by islands



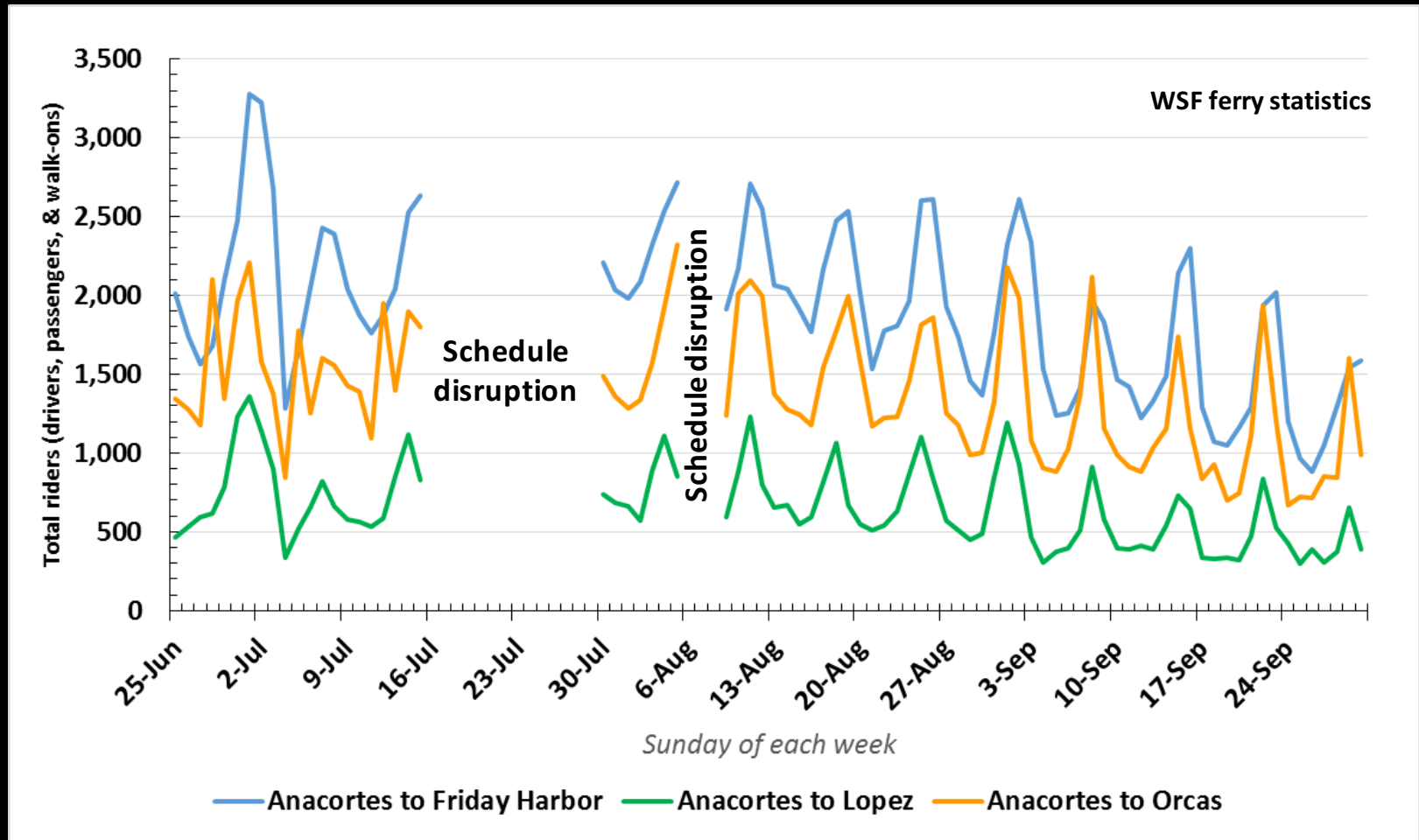
San Juan Island > Orcas > Lopez > Interisland

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

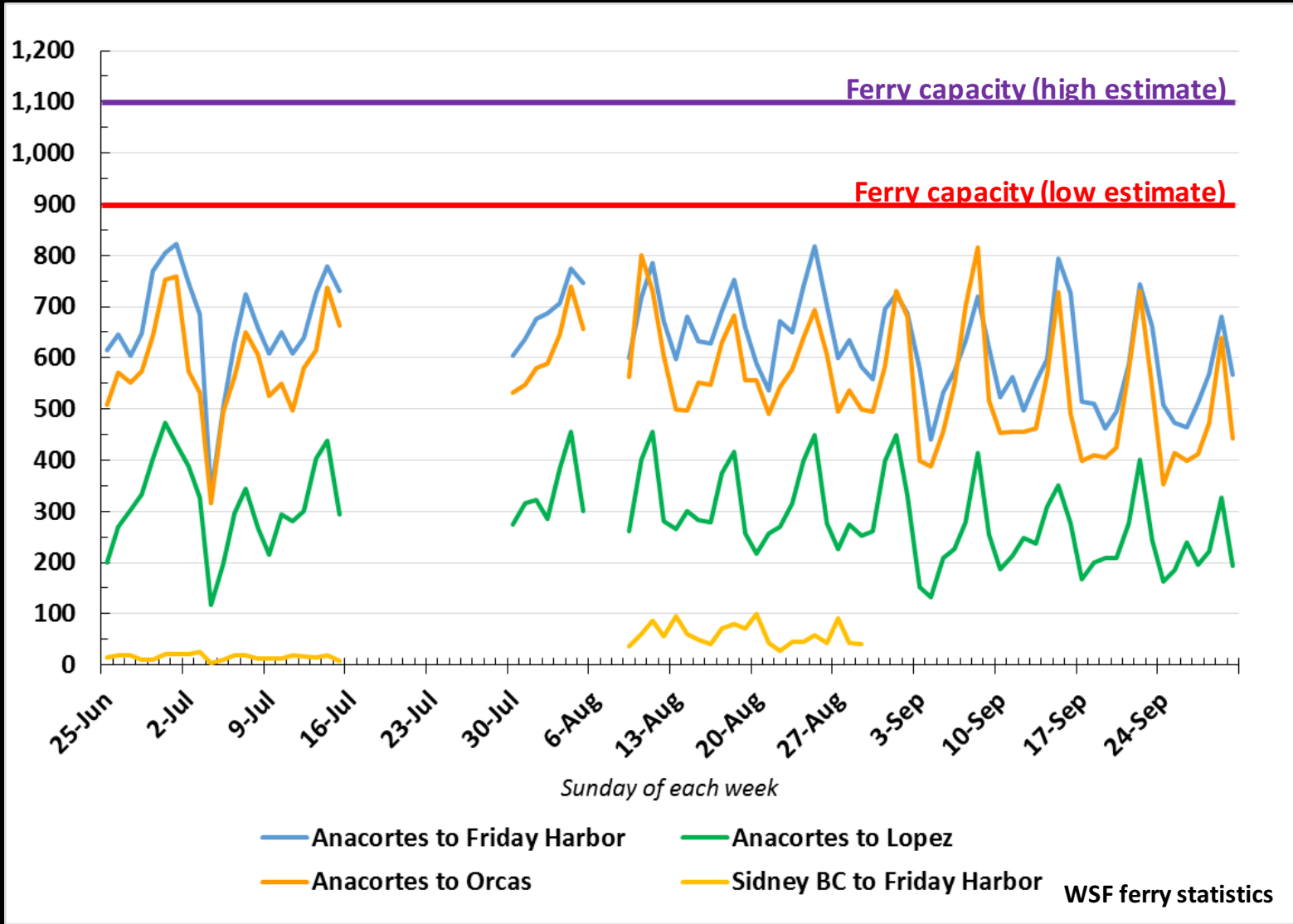
Per day capacity: ~800 to 1,000

Lopez –

- 5 direct from Anacortes + 2 to 3 with

Per day capacity: ~500 to 700

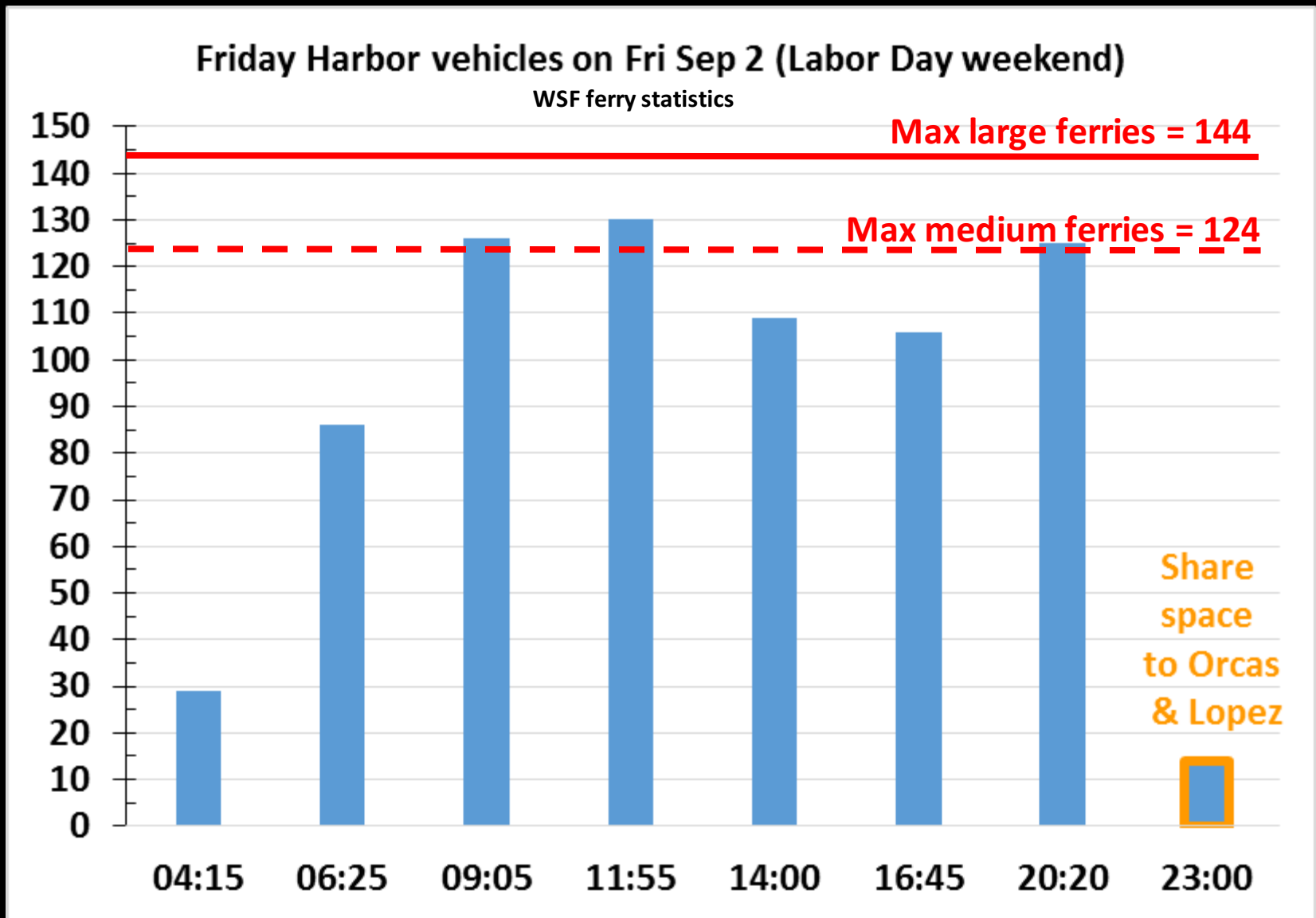
Vehicles per day by island 2017



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)



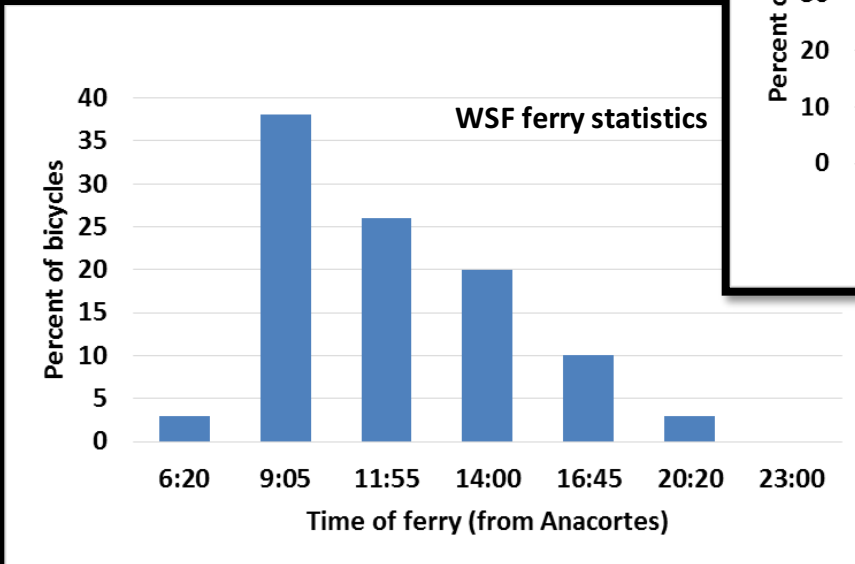
San Juan	2.1
Orcas	2.3
Lopez	1.8

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

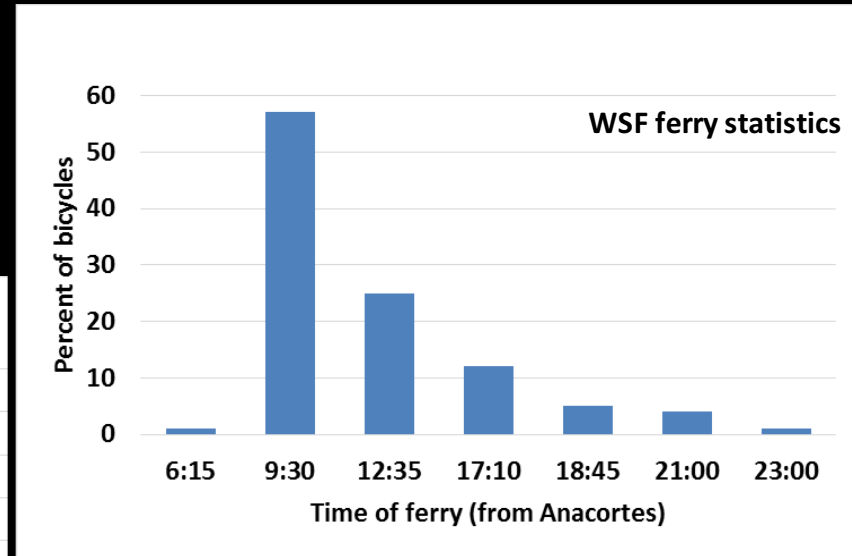
In winter/shoulder, fewer people per vehicle – more visitors with filled cars in summer

Ride-on bicycles: Percent by time of day

Anacortes → Friday Harbor

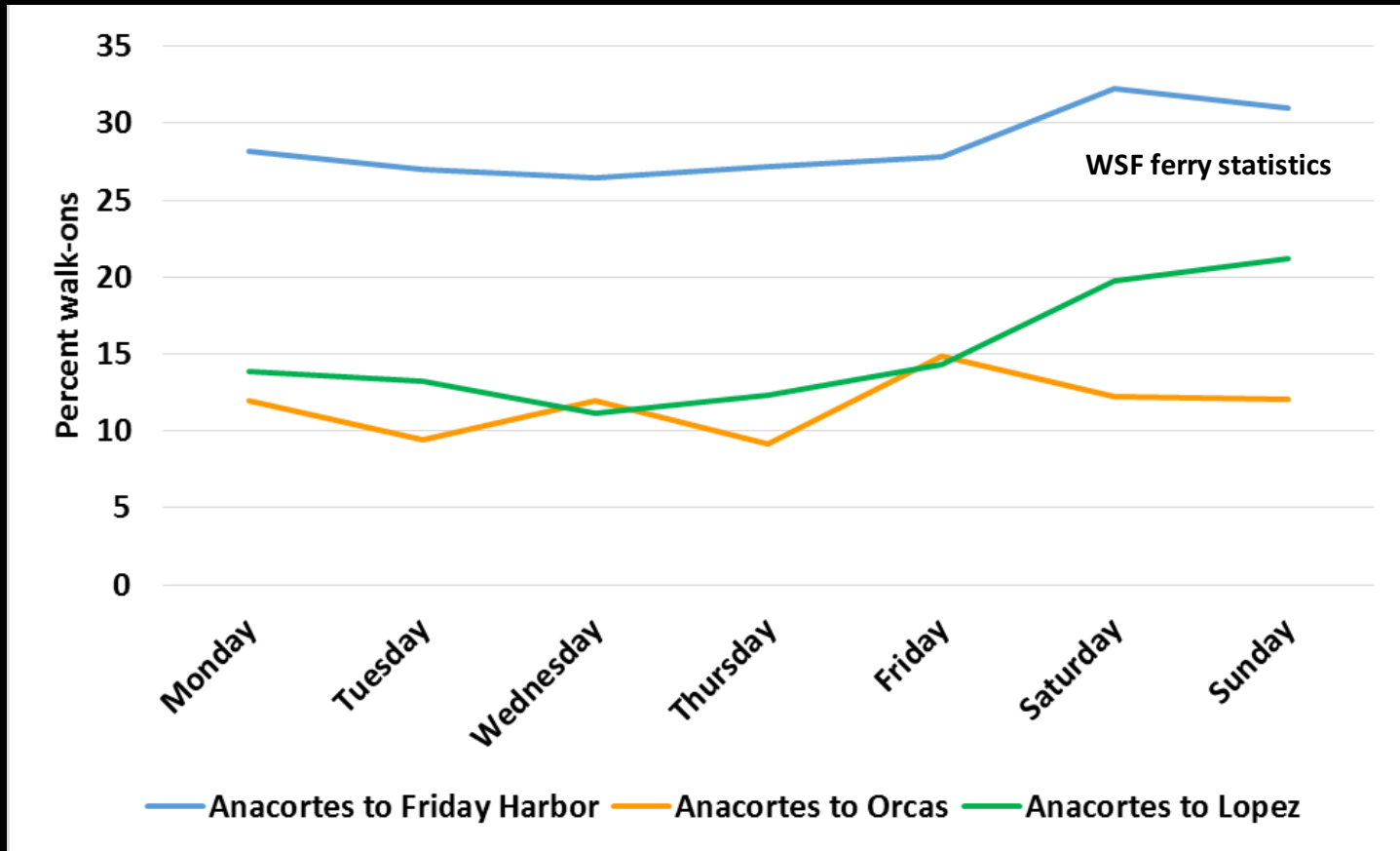


Anacortes → Lopez



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?

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

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



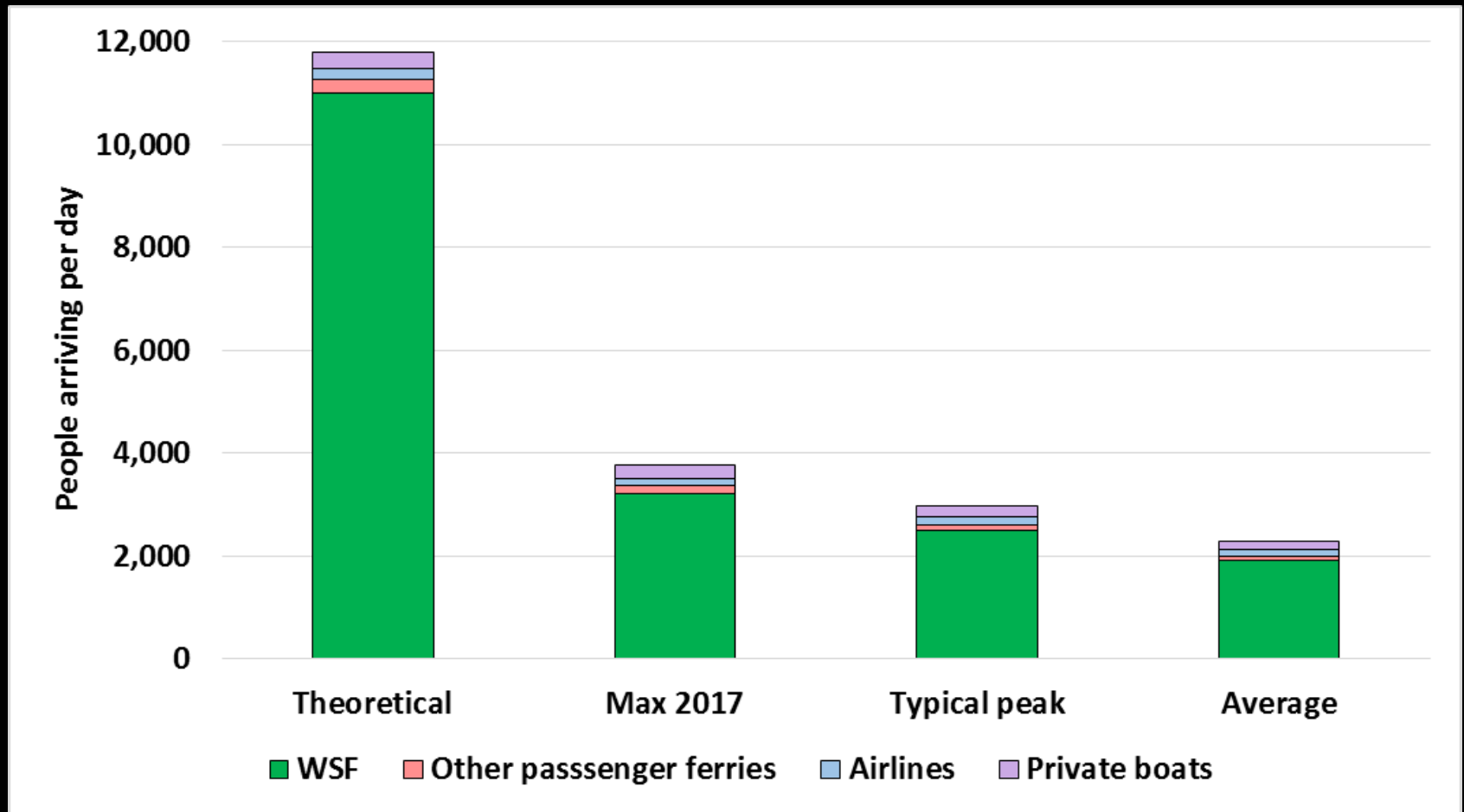
<2000 slips


<30% for cruisers (non-local)

Several use estimate challenges

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



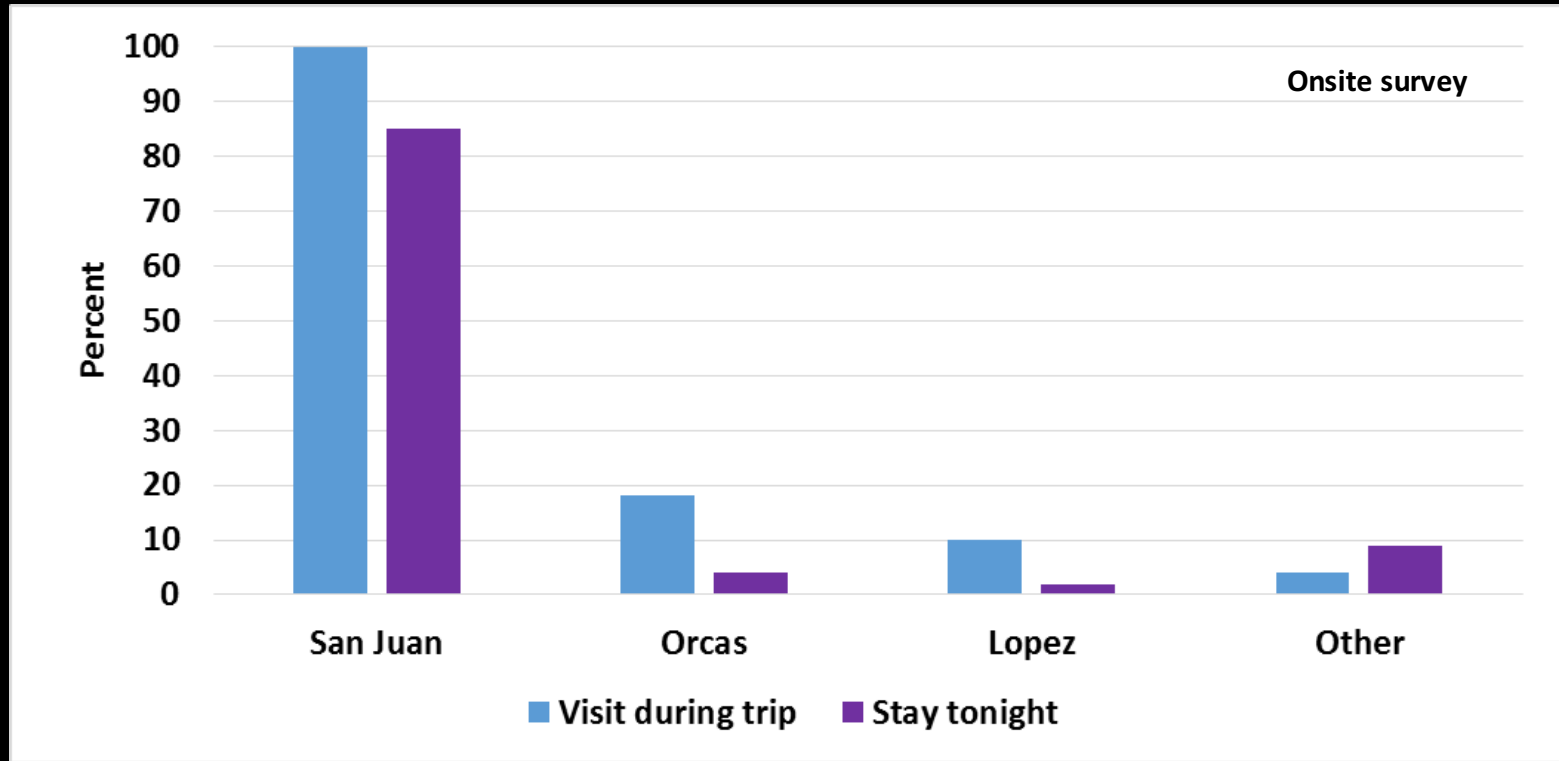
A photograph of two people walking on a pebbly beach. The person on the left is wearing a dark jacket and pants, and the person on the right is wearing a yellow vest over a dark shirt and dark pants, carrying a white bag. They are walking away from the camera towards the water. The water is a deep blue with gentle ripples. The beach is composed of small, dark pebbles and sand. The sky is not visible, but the lighting suggests a bright day.

Who are they?

From onsite and ferry survey

Which islands do SJI visitors go to?

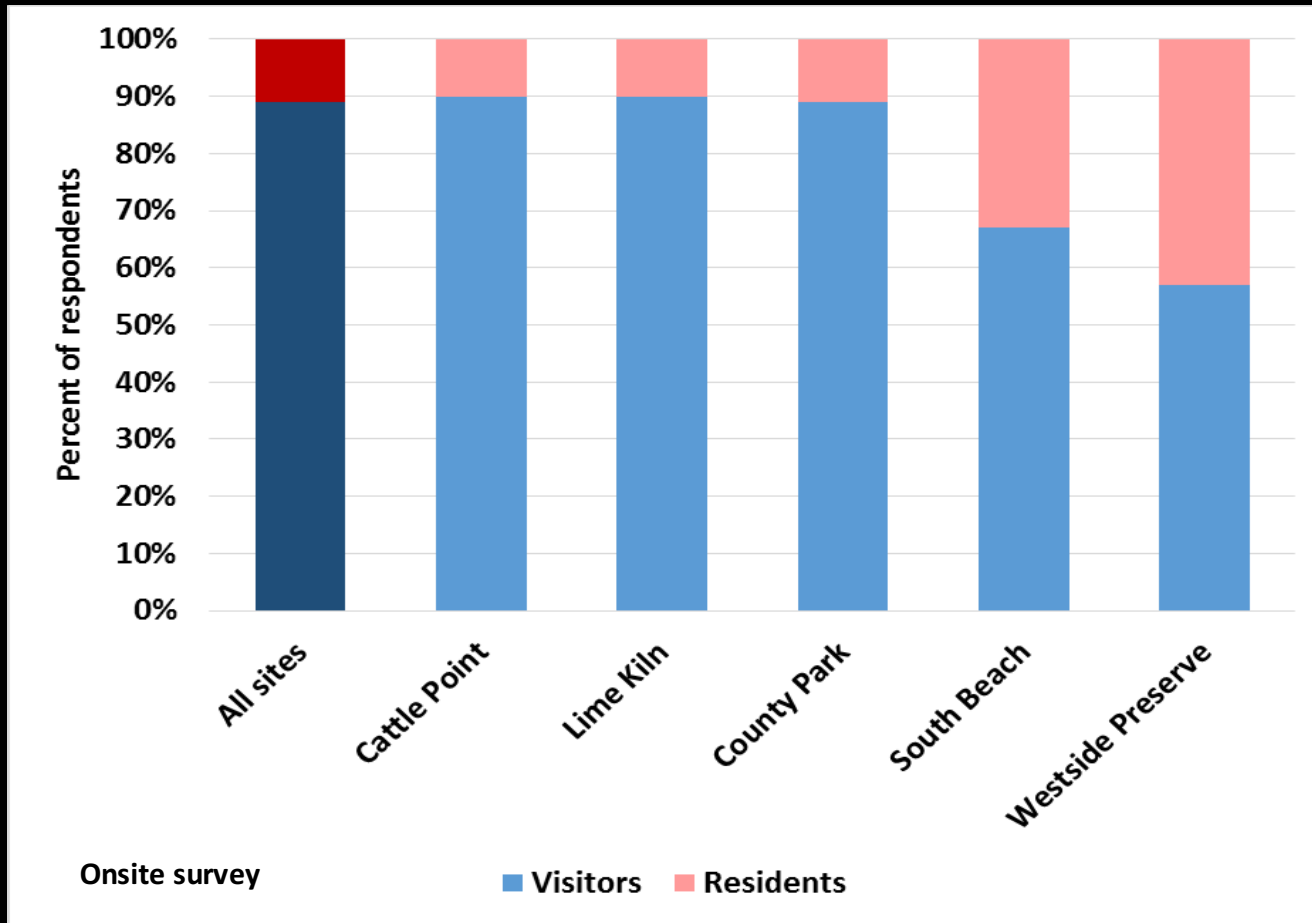
From onsite survey



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

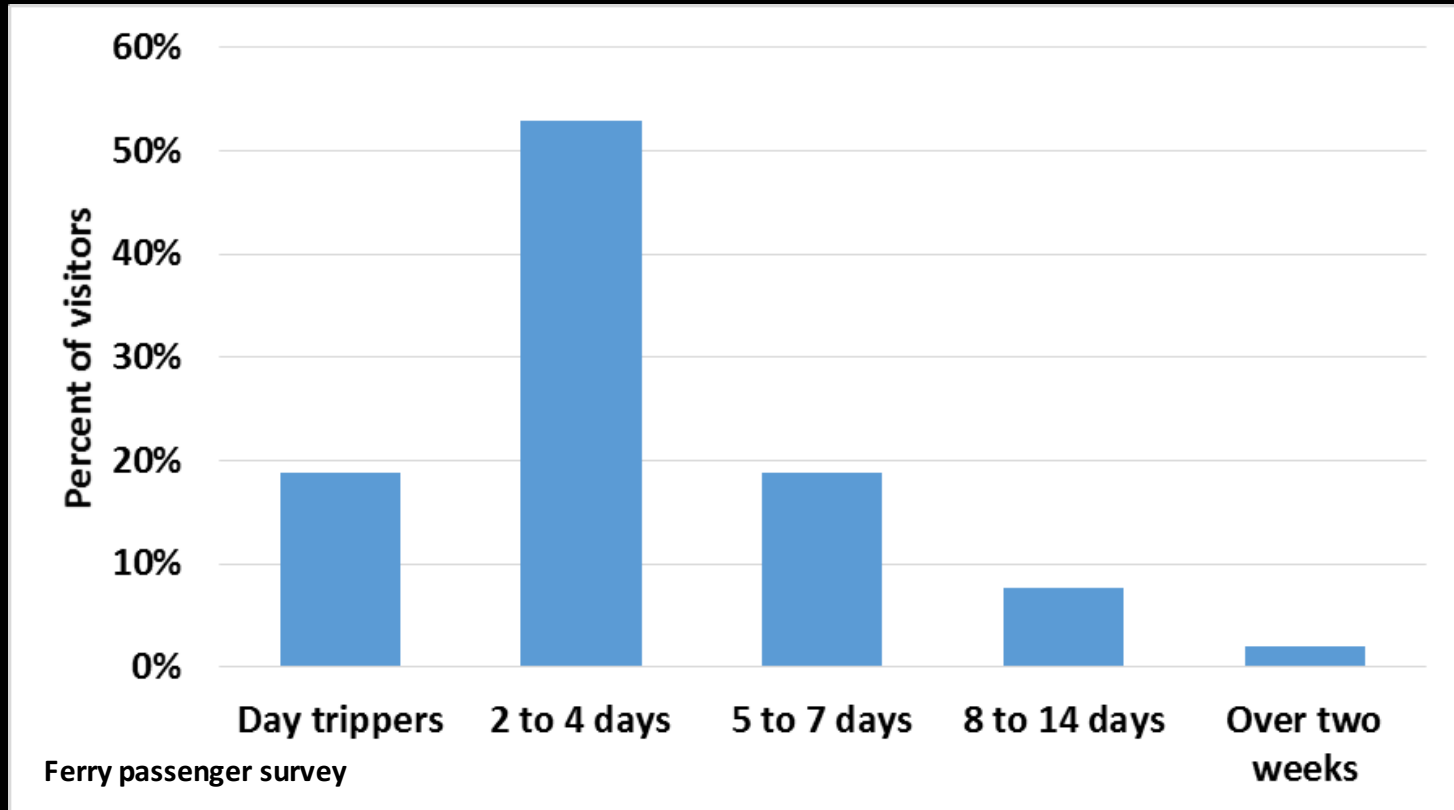
San Juan Island

Percent visitors (n=465) and residents (n=59)



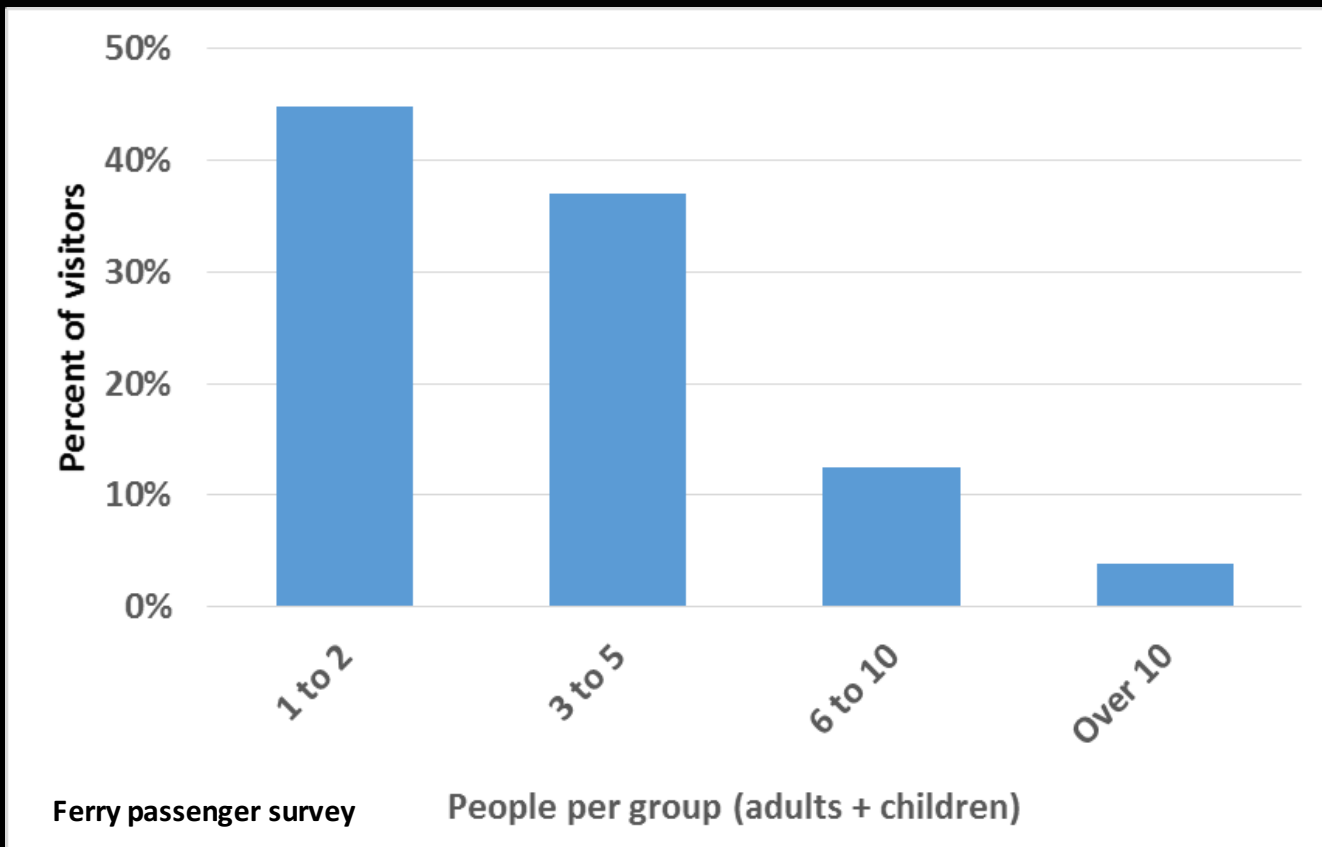
About 9 in 10 people at sites are visitors (higher than other islands)
South Beach and Westside have lower proportions (but small samples)
Higher visitor proportions than Lopez and Orcas (80%)

Visitor length of stay



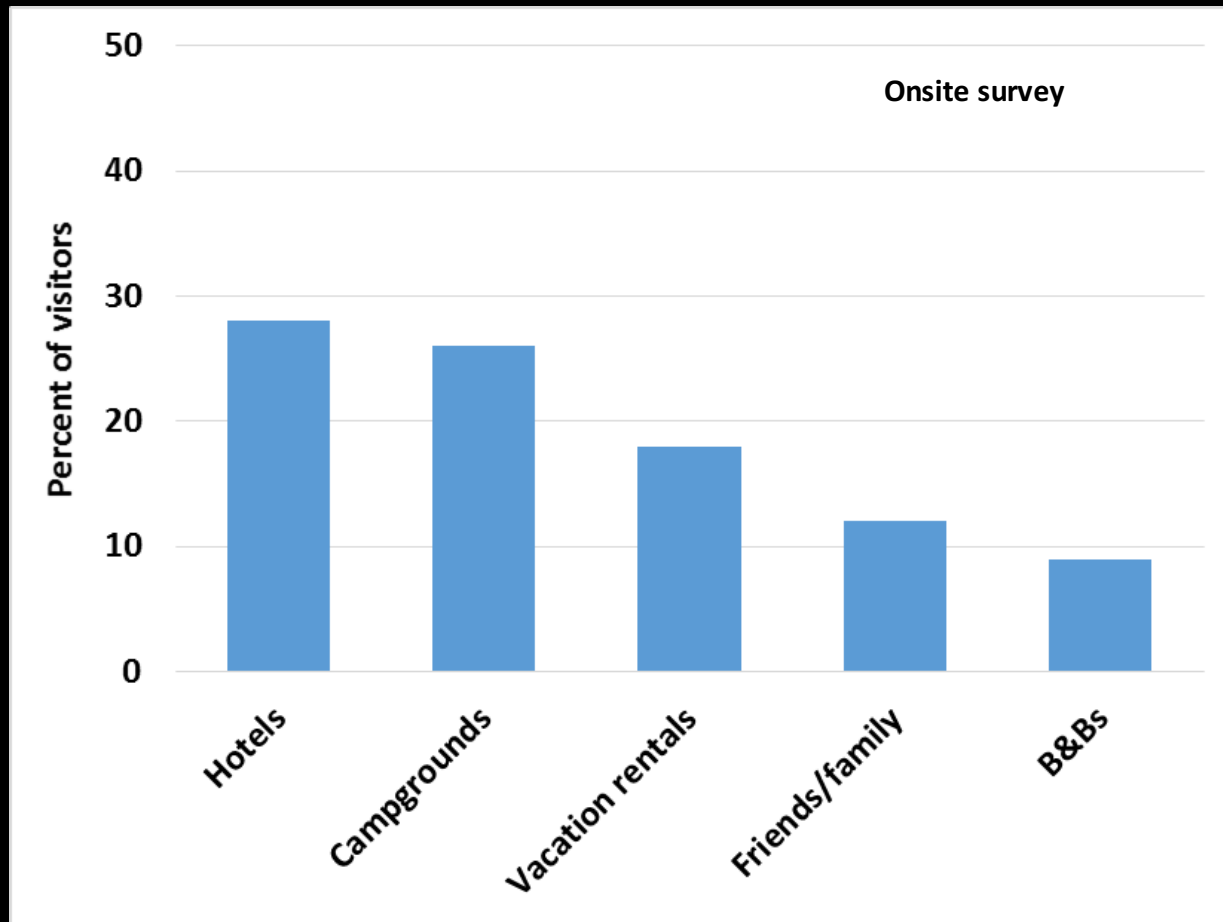
Much more day use than Orcas & Lopez
Median 3.0 days
Majority stay less than a long weekend

Visitor group size



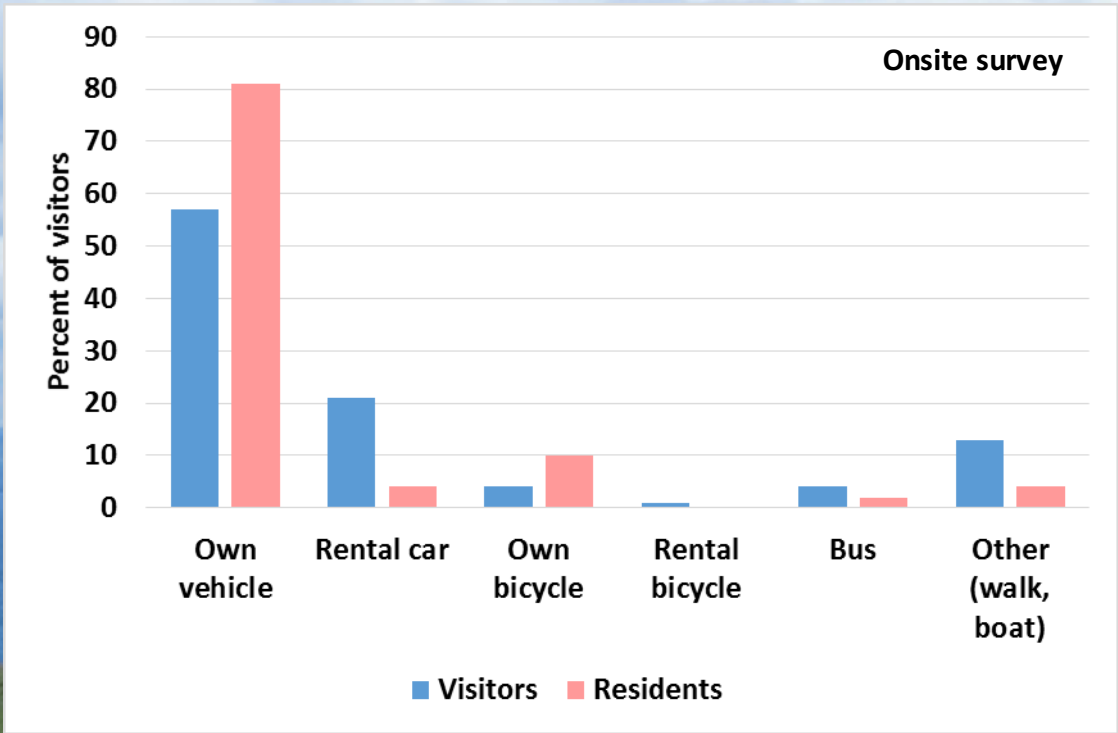
Mostly small groups
Median 3.0; average: 4.1 (similar to other islands)
Largest group: 48 kids + 16 adults; some other groups >16

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

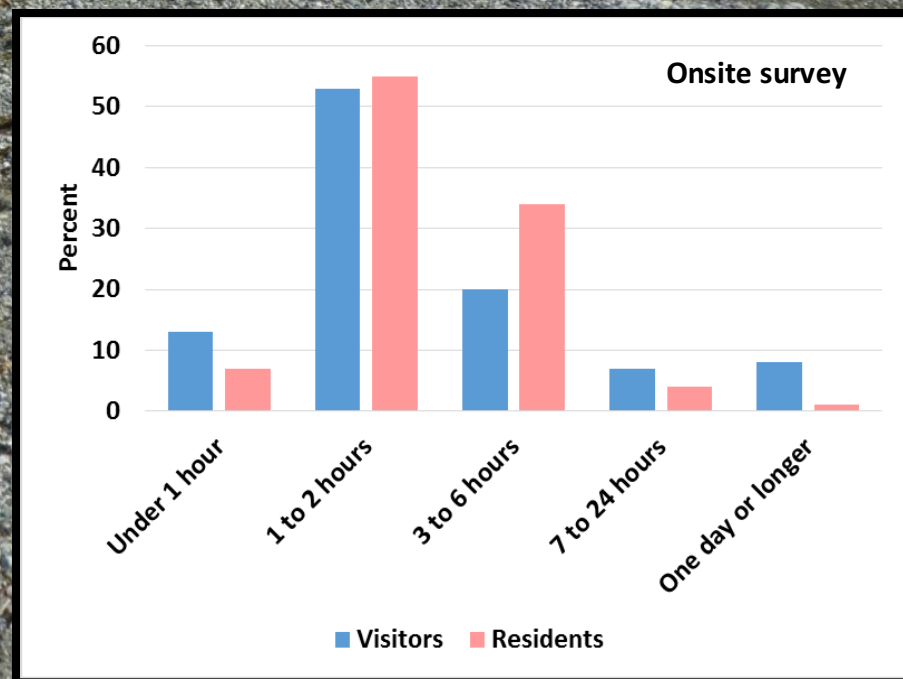
Travel to sites – Visitors and residents



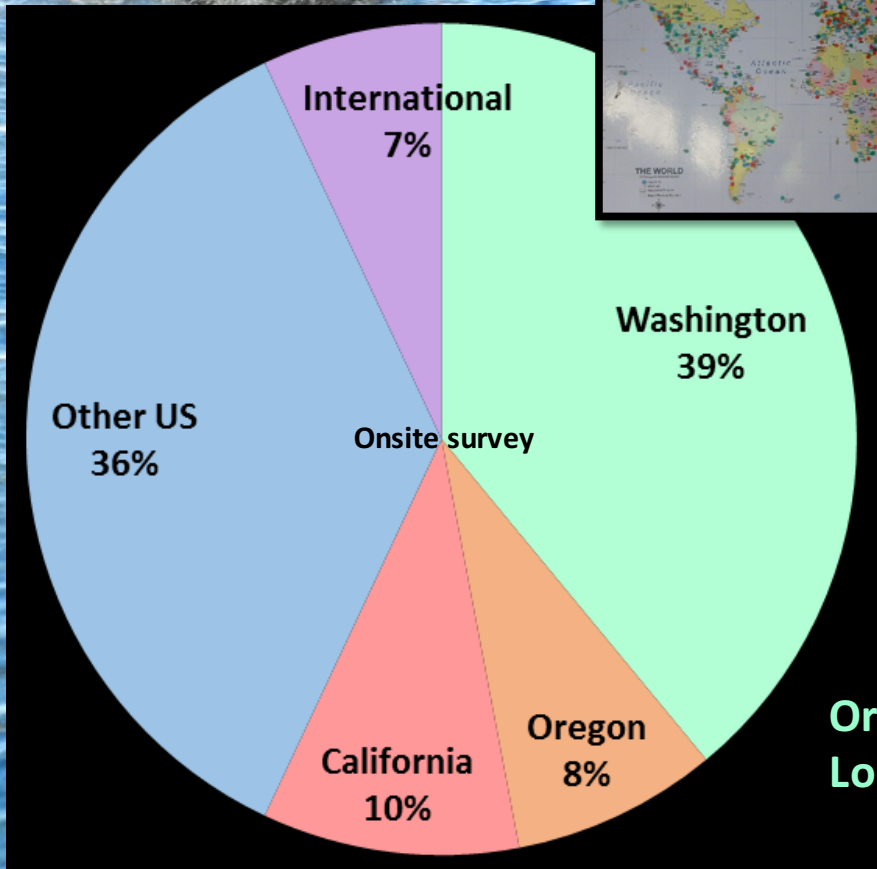
Most drive vehicles – their own or rentals
Residents use bikes more often than other islands



Length of site visit Visitors and residents

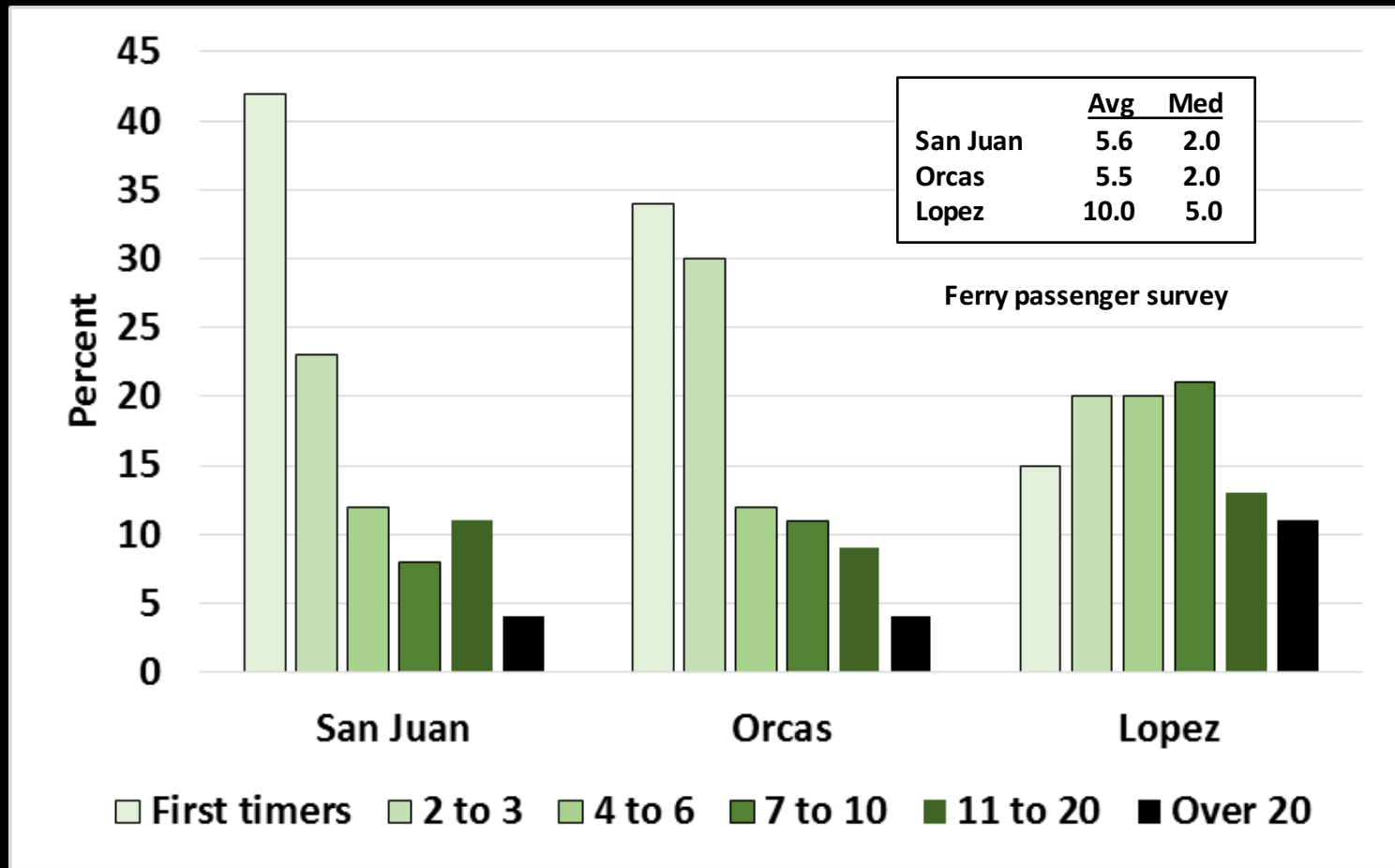


San Juan Island visitors – Where are they from?



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

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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).”

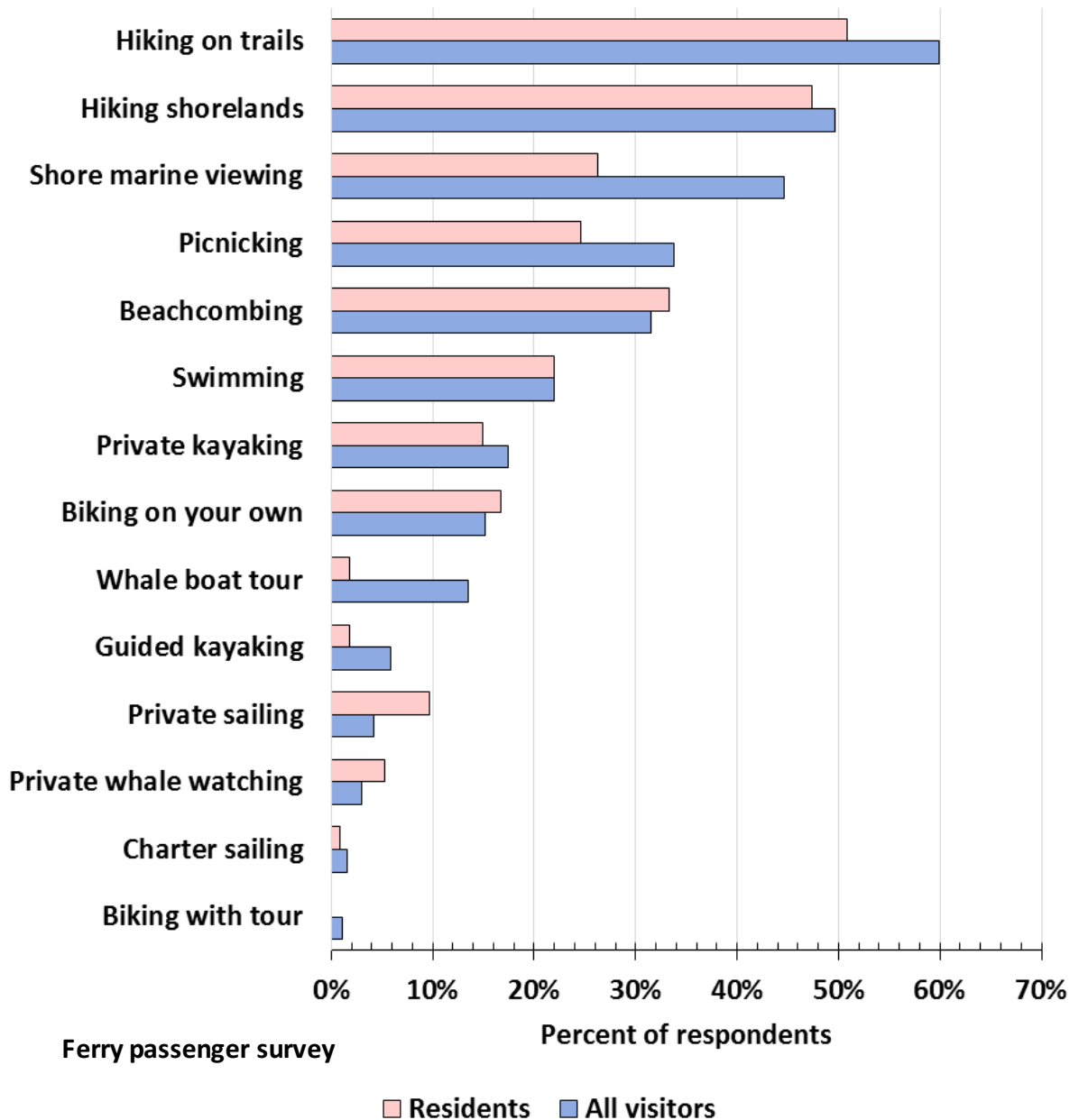
Hiking on trails

Etc.

14 activities listed on survey

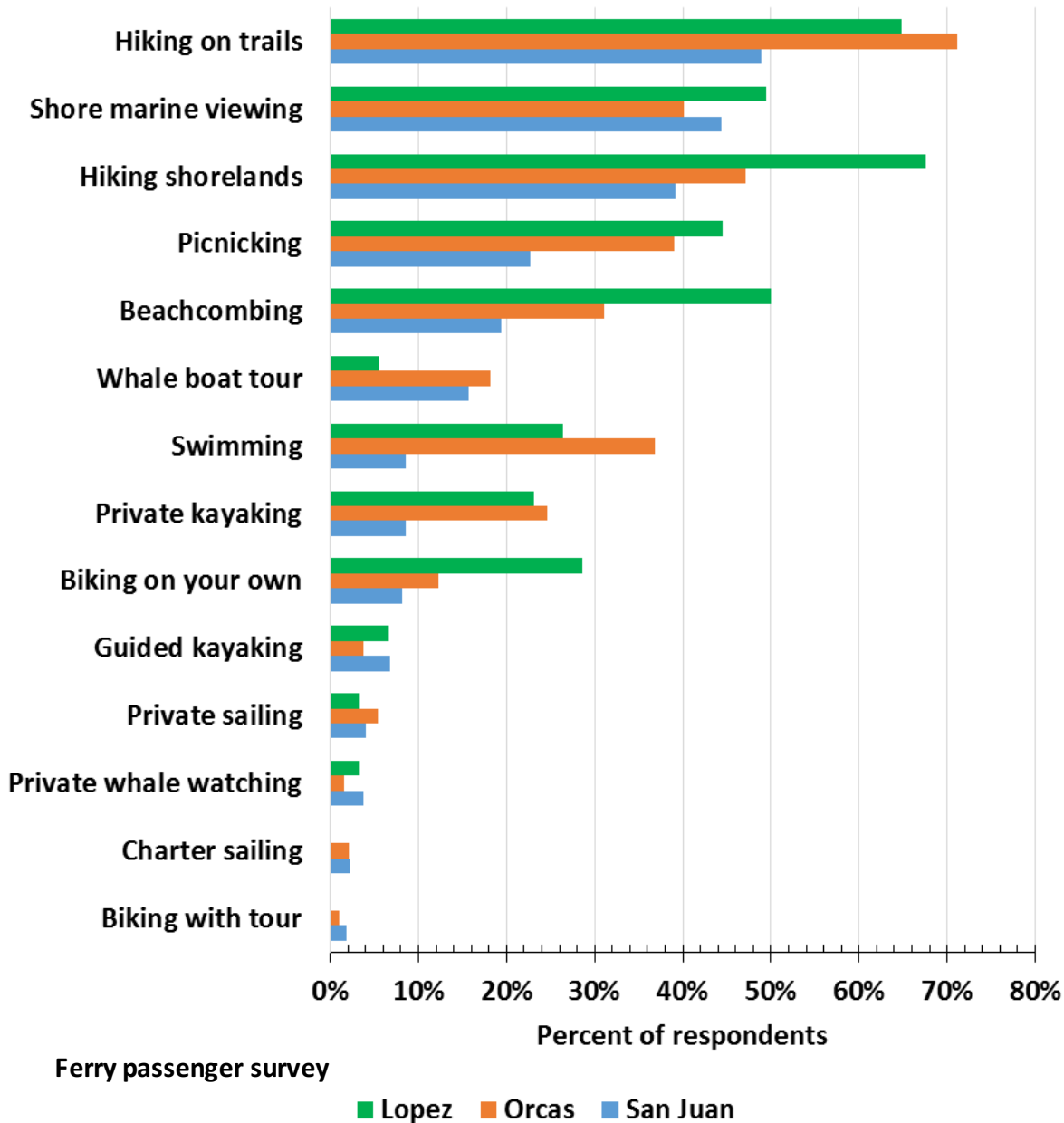
Percent of visitors and residents who checked each shown on graph

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

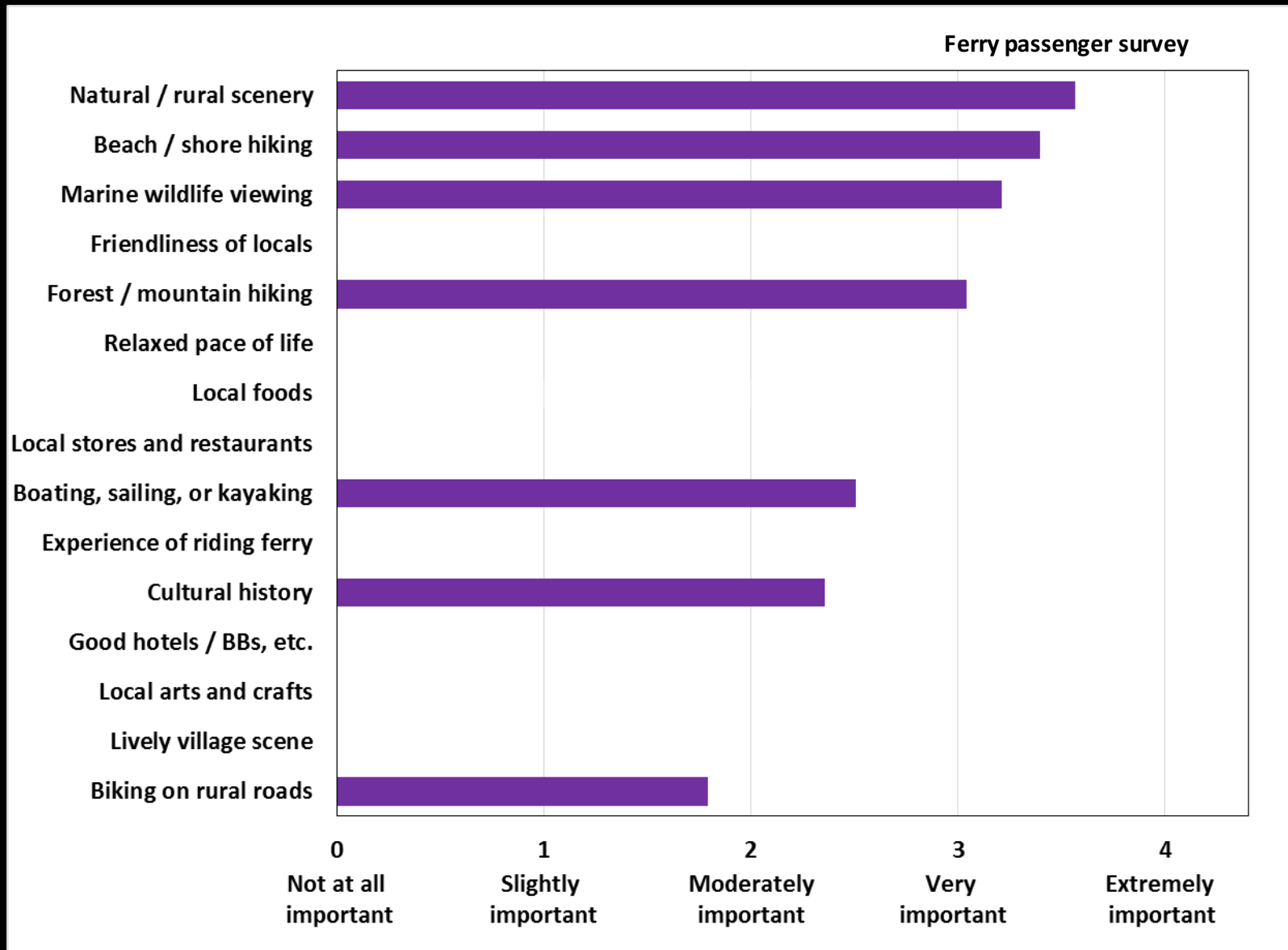
“People enjoy the San Juan Islands for many reasons. Please rate the following reasons for you.”

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

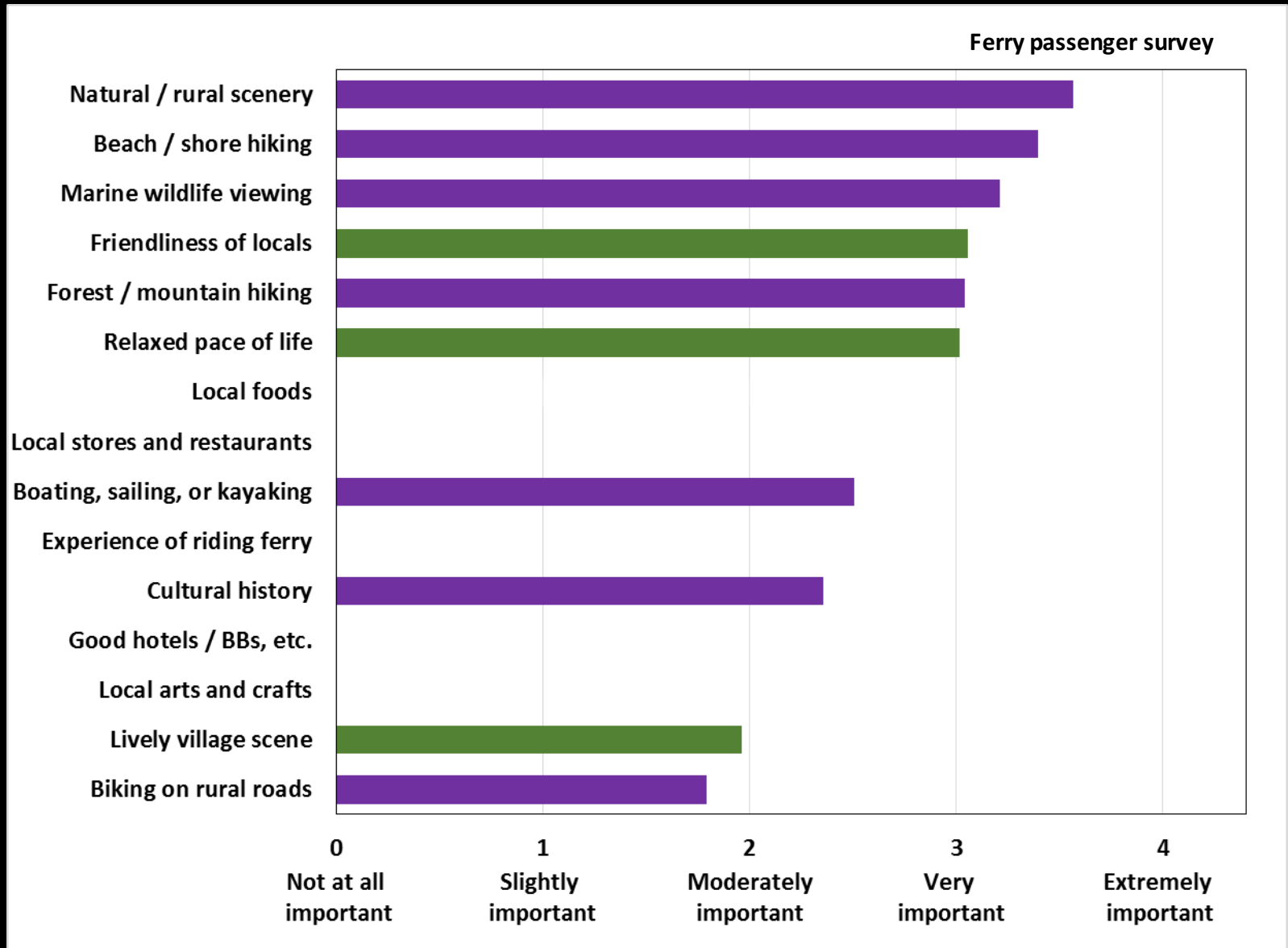
15 items on the survey

Average importance of 12 key items on following graph

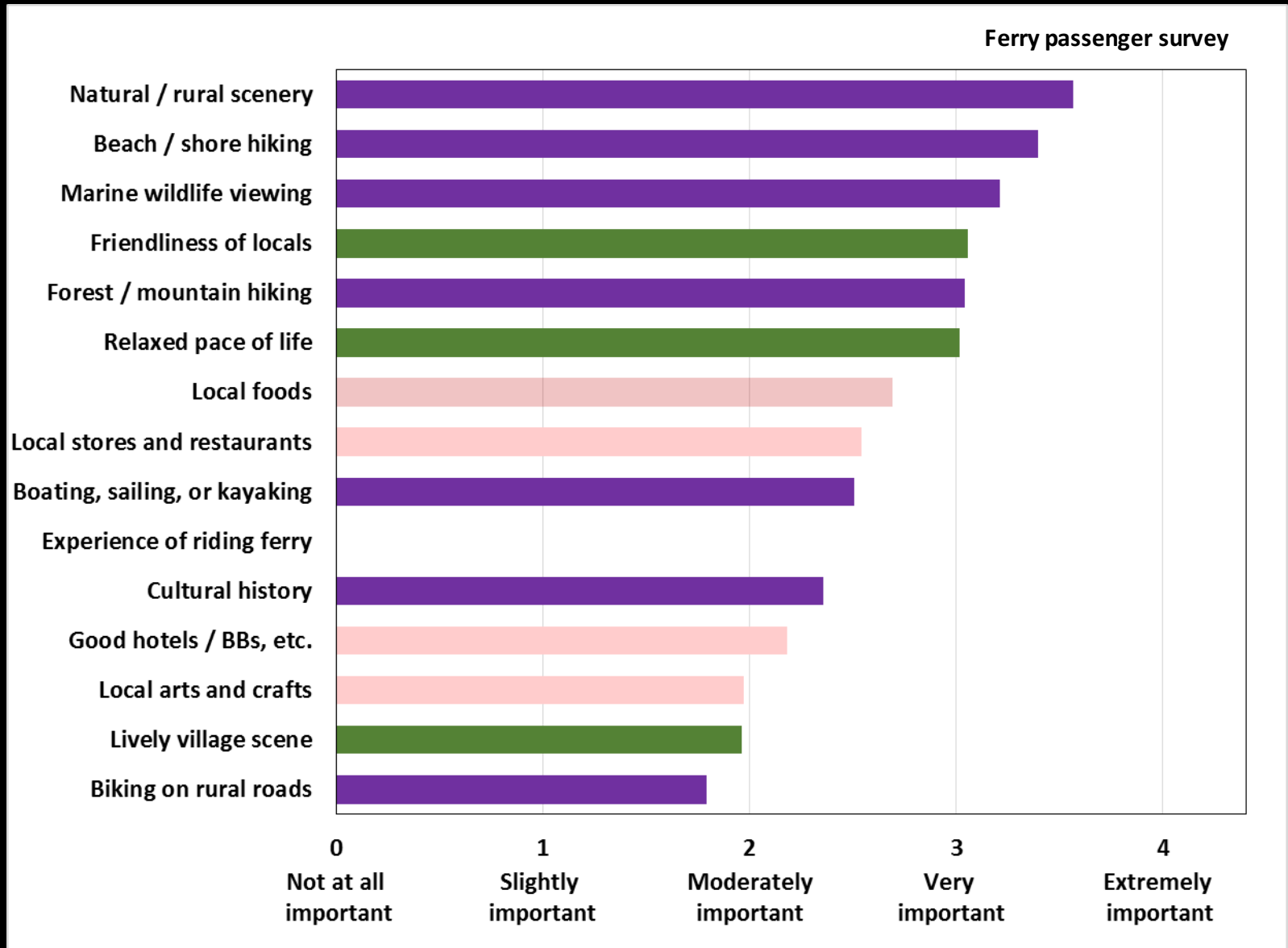
4 of 5 most important experiences rely on natural resources



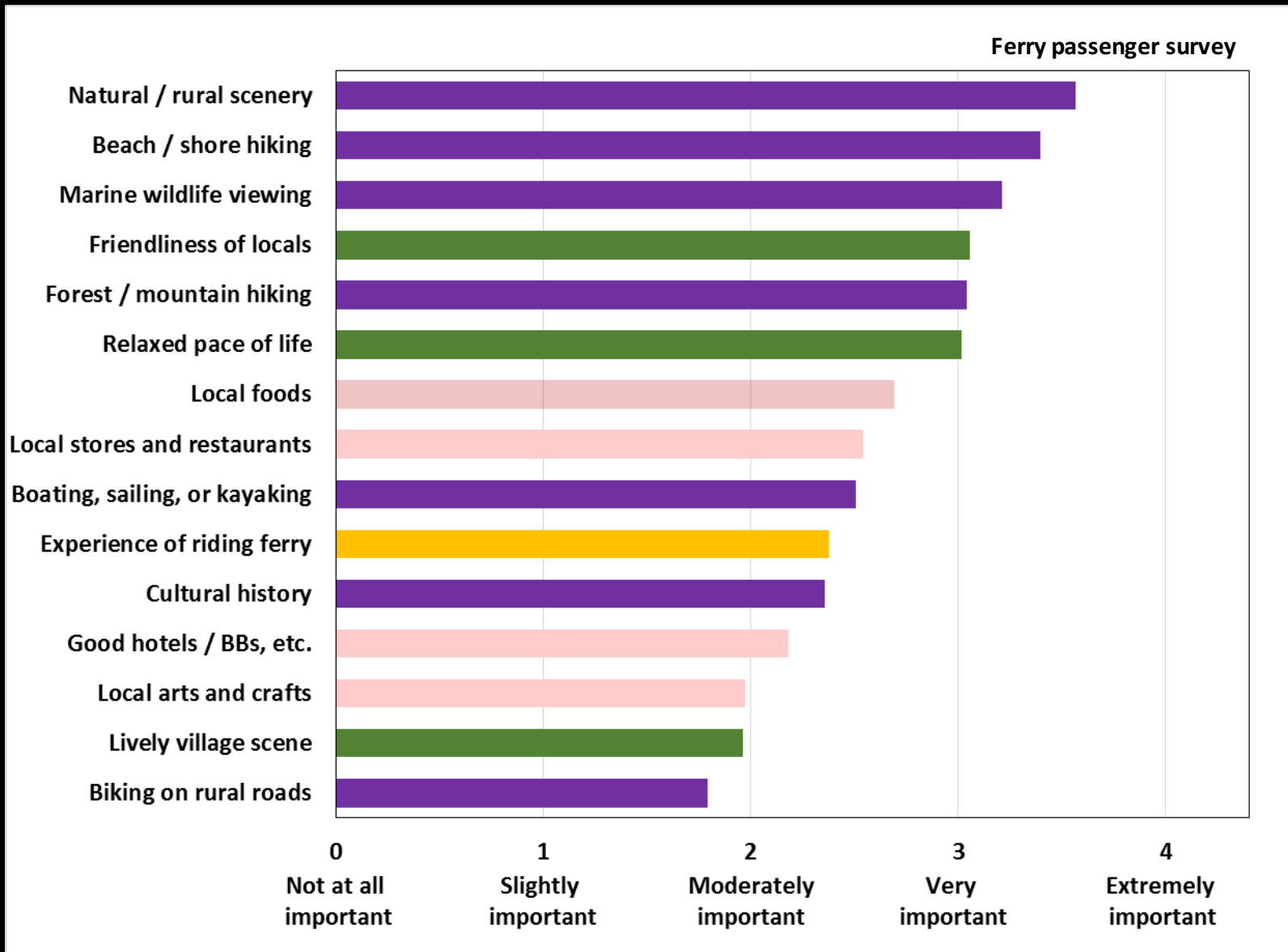
Social setting: Friendliness & relaxed pace > lively village scene

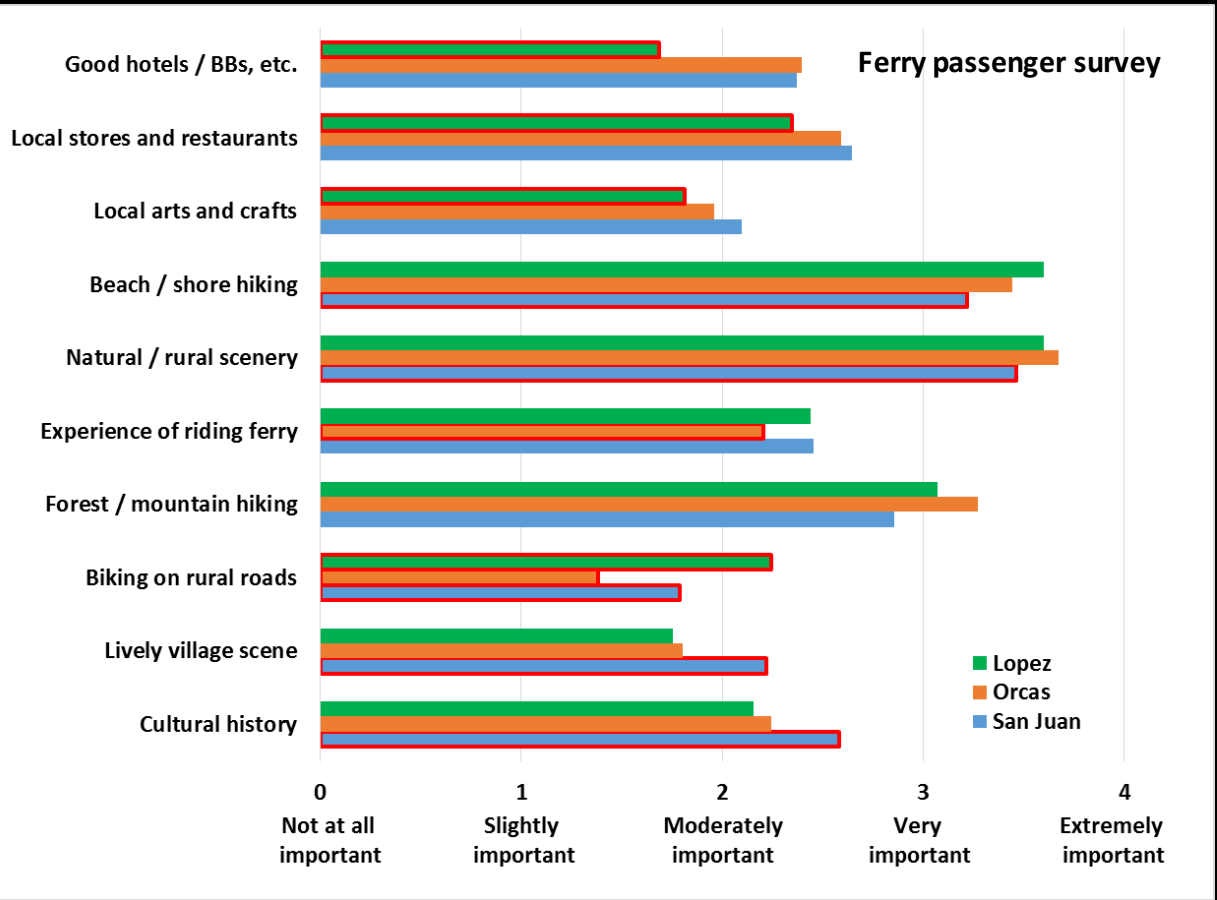


Tourism development is relatively less important



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**

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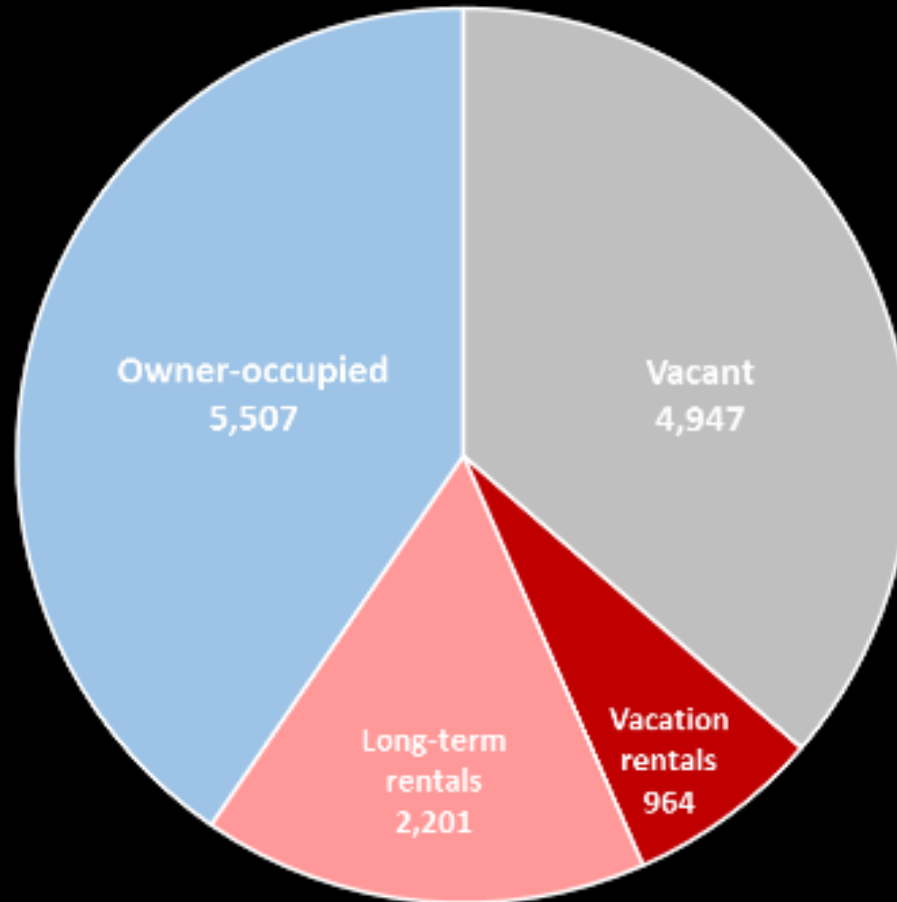


**Hotel
Inventory**

Overall housing stock

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

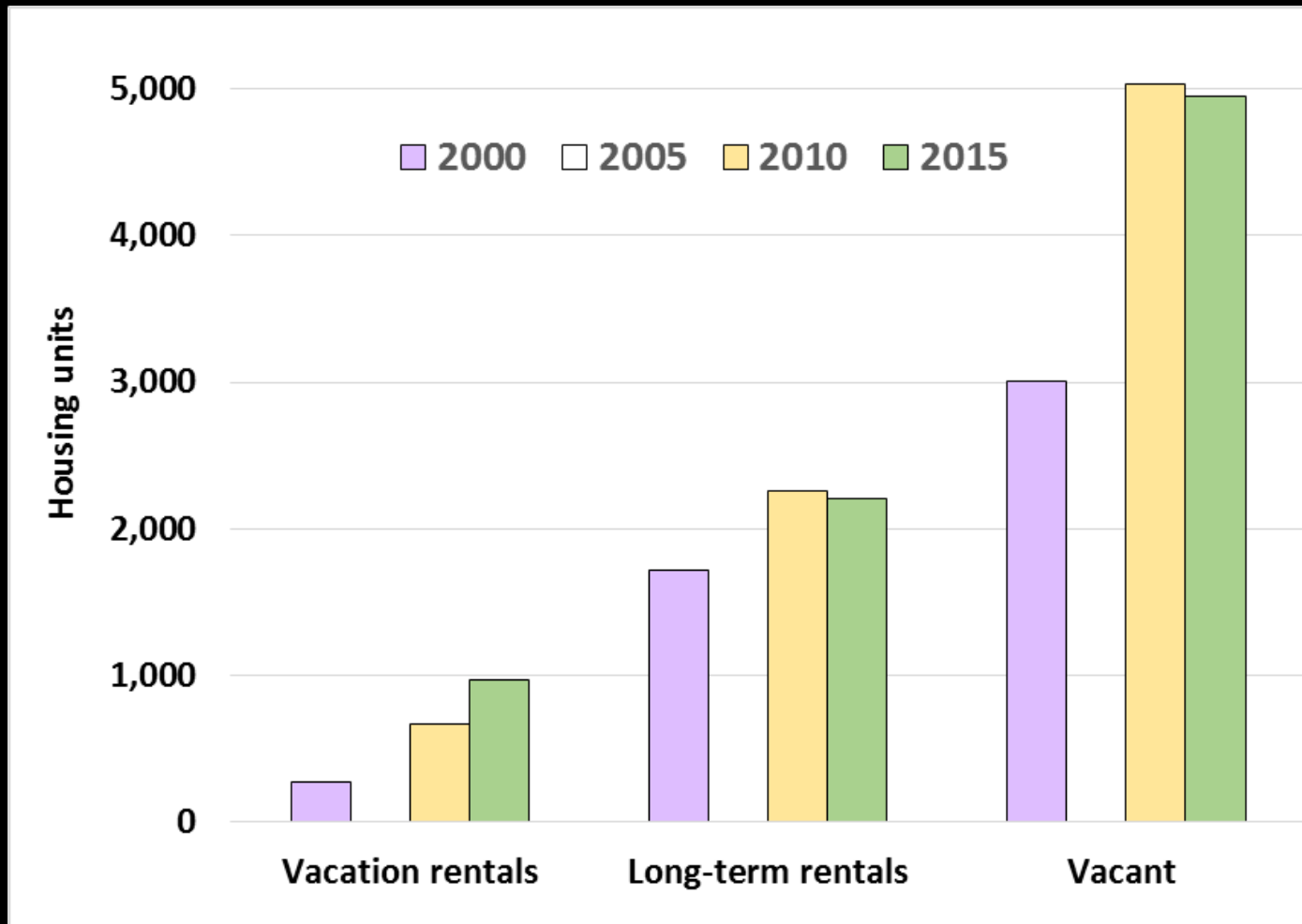
Four categories



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

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

The screenshot shows an Airbnb search results page for "San Juan Islands - Homes". The search parameters are set for "Jan 17 - Jan 21" with "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 islands, with price tags overlaid on the map. The map includes labels for various islands such as Stuart Island, Roche Harbor, Henry Island, Yacht Haven, Lakedale, Shaw Island, and West Beach. The price tags range from \$94 to \$581. The search bar at the top contains the text "San Juan Islands - Homes". The navigation bar at the top right includes links for "Become a host", "Help", "Sign Up", and "Log In". The filter bar below the search bar includes options for "Home type", "Price", "Instant Book", "Trip type", and "More filters".

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

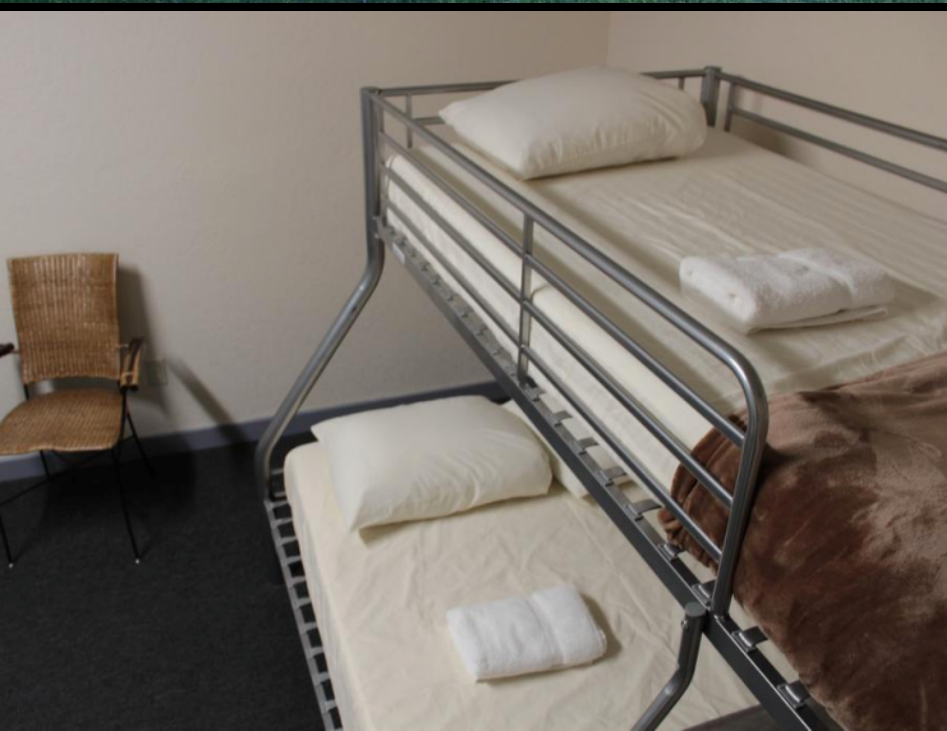
Map showing property locations and prices: \$581, \$112, \$426, \$220, \$94, \$229, \$288, \$161, \$173, \$203, \$165, \$256, \$102, \$176.

Language and currency

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



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Hotel Inventory

An aerial photograph of a coastal resort area. In the foreground, a large, multi-level dock system extends into a blue body of water, with numerous white yachts and boats moored. A long wooden pier connects the dock to a long, low building on the shore. The background features a mix of green grass, paved areas, and dense evergreen forests. Several buildings, including a large white structure and a blue-roofed building, are visible. The overall scene is a well-maintained waterfront facility.

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

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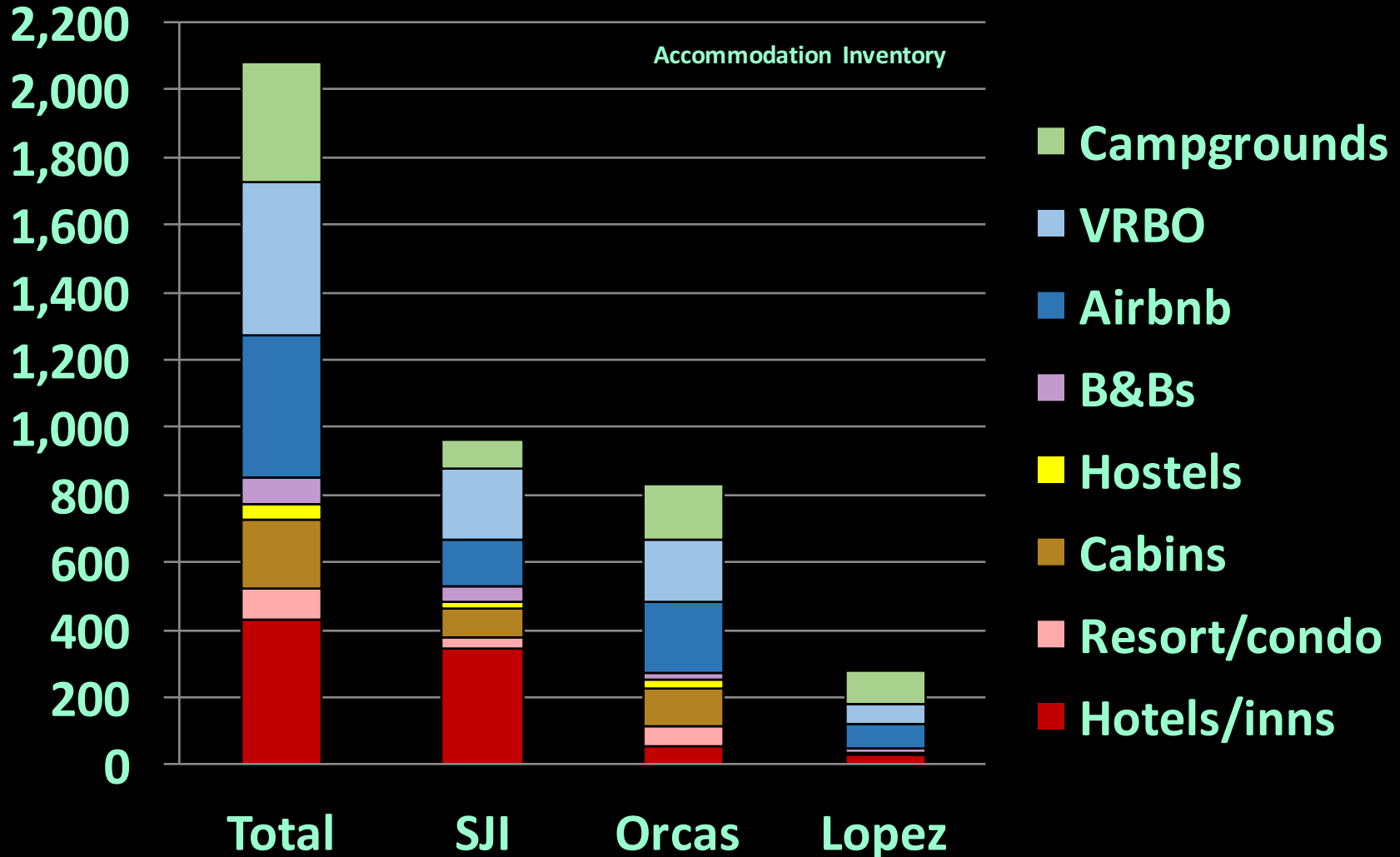
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**~ 50% of units
have kitchens**

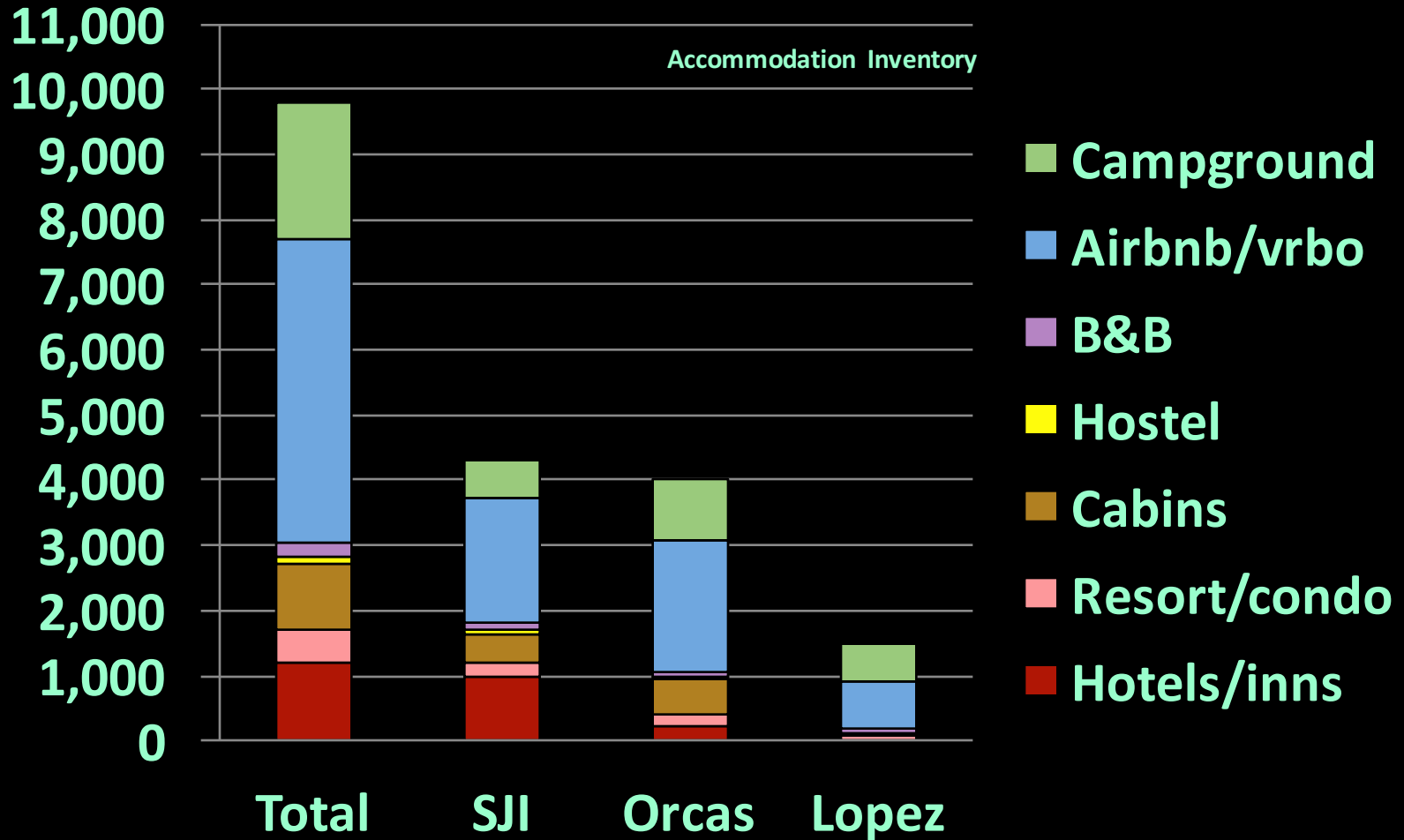
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Number of accommodation units

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

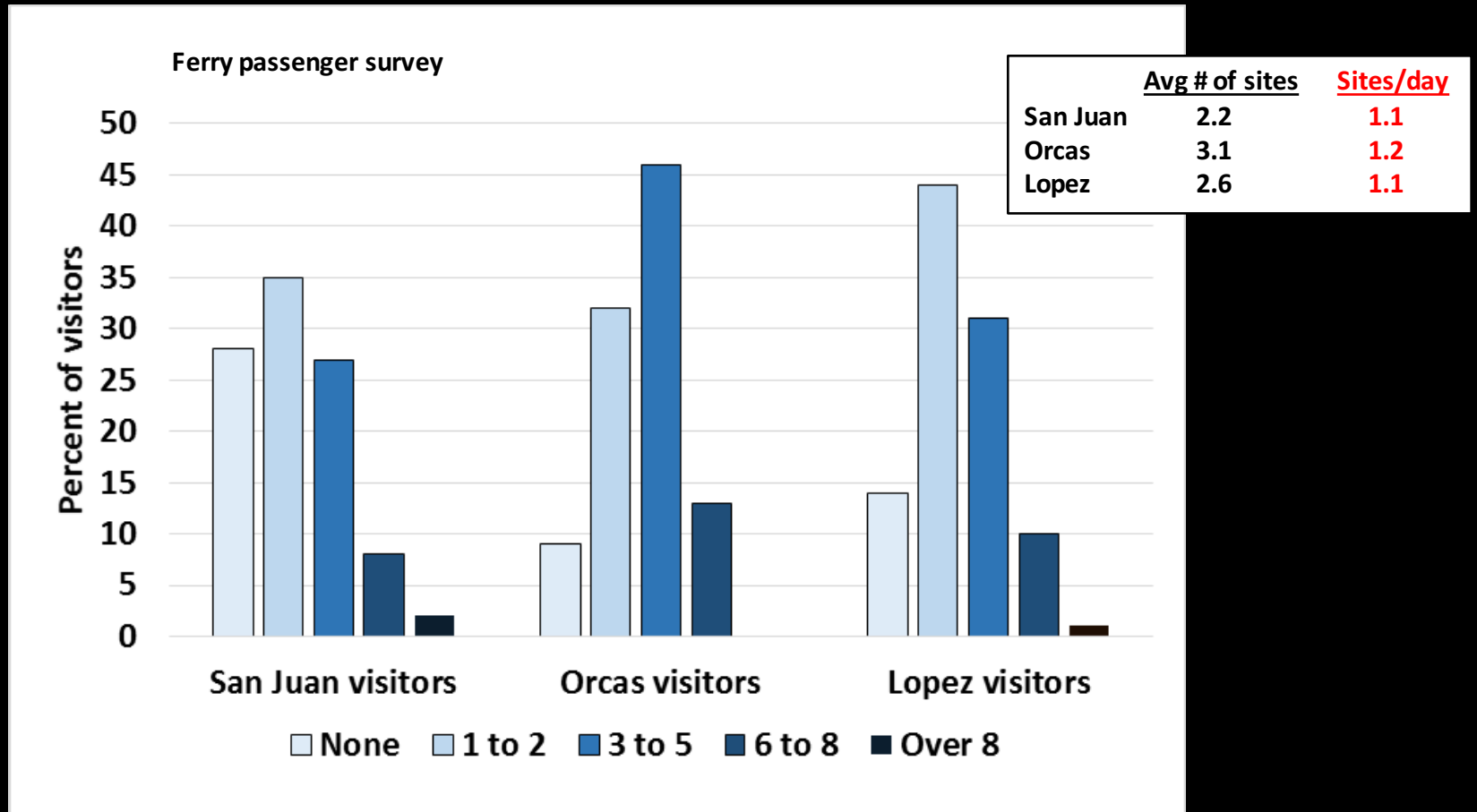
Where do they go?

Onsite and ferry surveys; some use stats



Number of recreation sites visited (total and per day)

For the island where they were surveyed

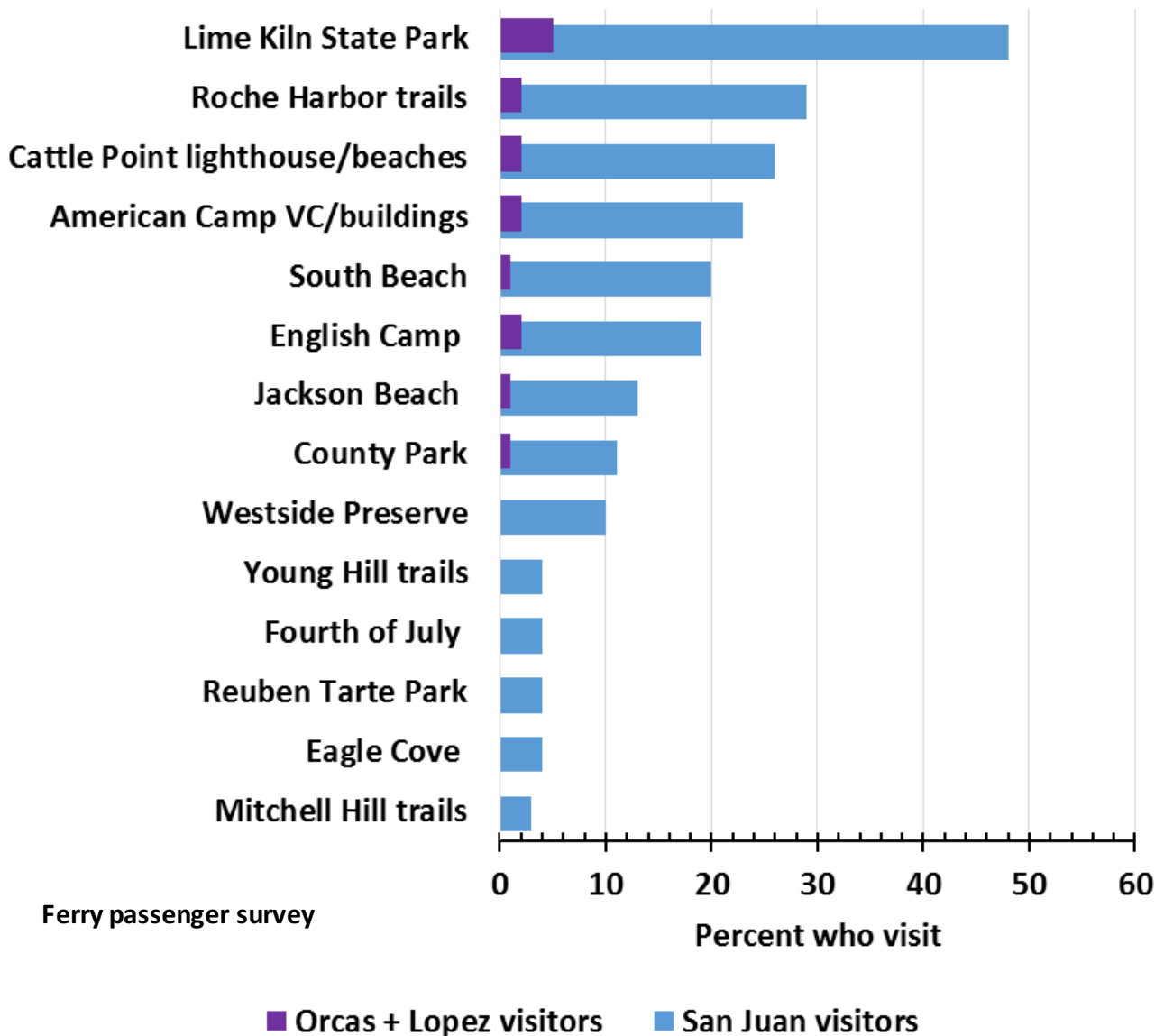


Majorities visit multiple sites

Orcas > Lopez > San Juan

More San Juan visitors don't visit any sites

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



Most visited outdoor recreation sites on San Juan Island

Others listed:

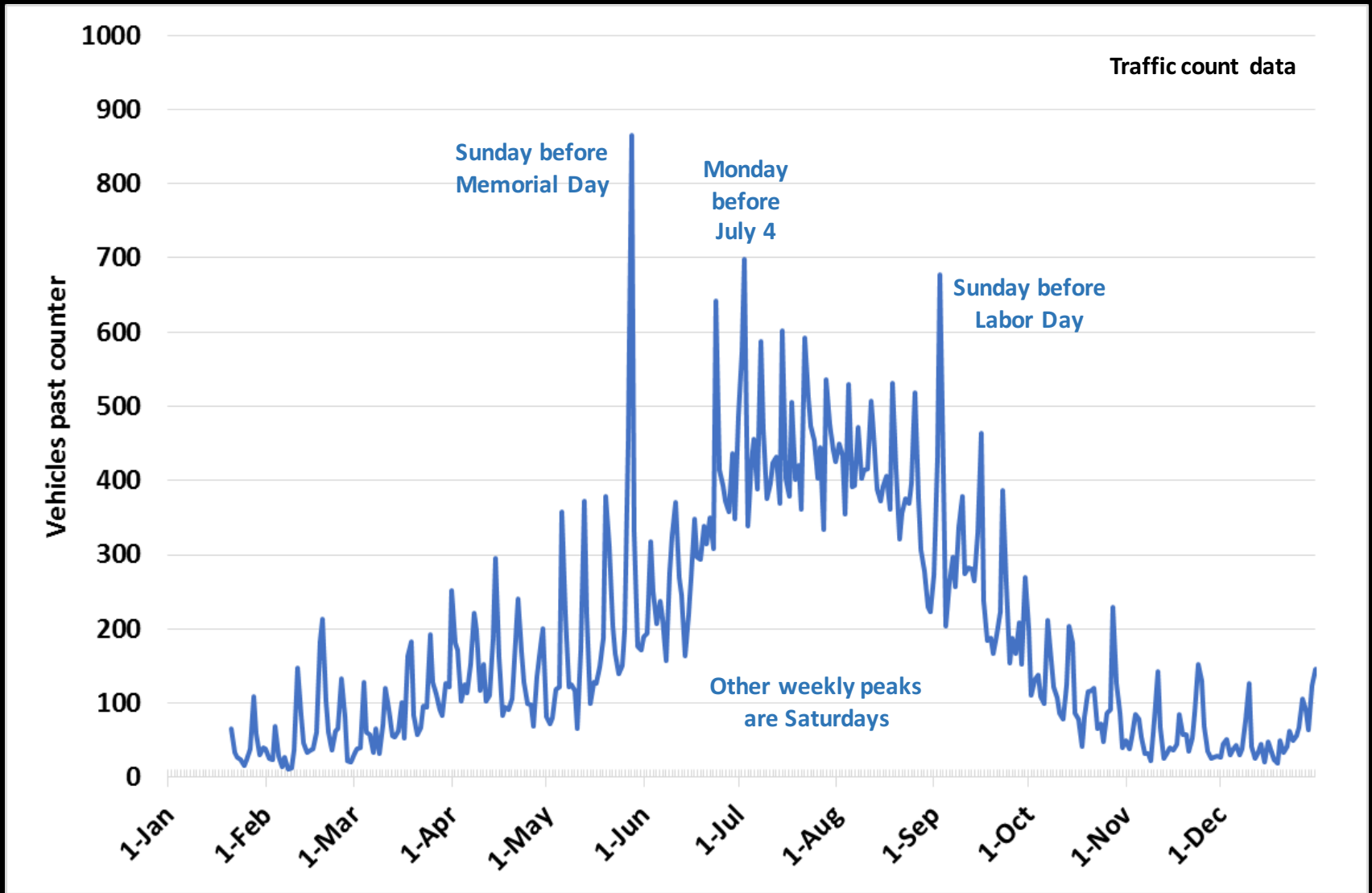
- Friday Harbor
- Shops/restaurants
- Alpaca Farm
- Lavender Farm
- Deadman's Bay
- Egg Lake
- Cemetery
- Whales

Use levels at sites

Onsite counts



Lime Kiln traffic counts 2017



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

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Bob Otis Lime Kiln observations

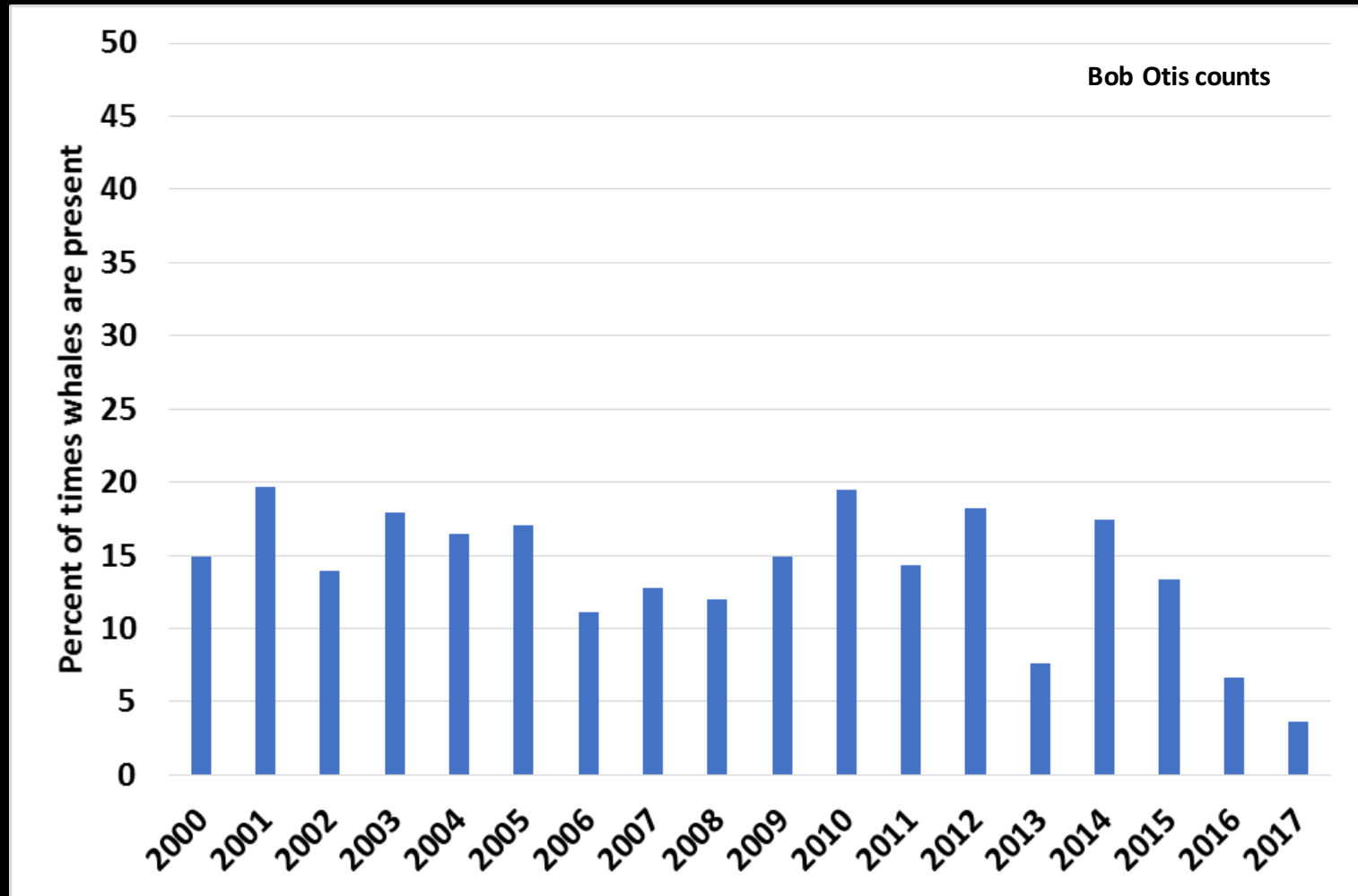
Ripon College researcher
Tracked whales since 1990
9-5 May 20 to Aug 10 (83 days)

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

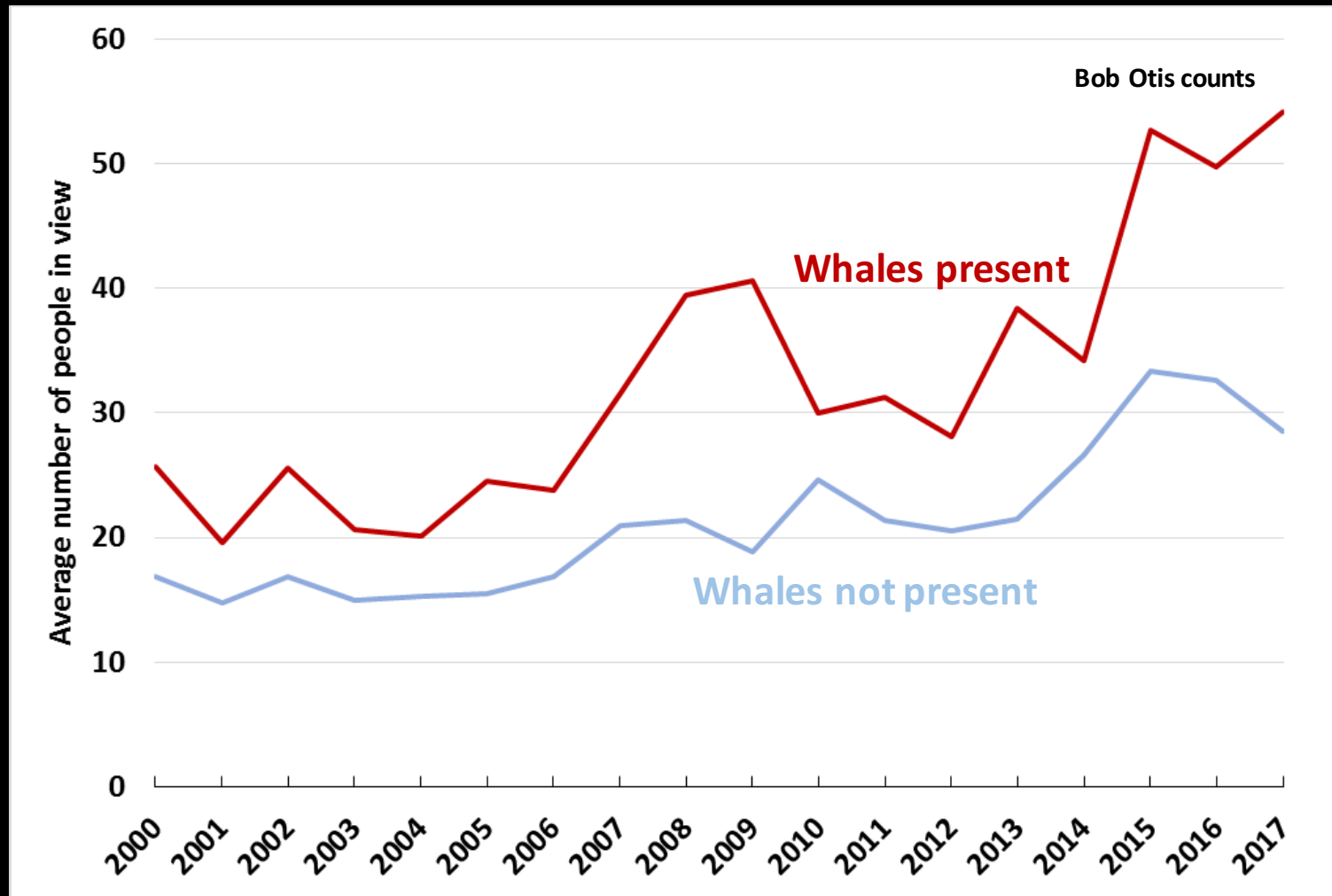
10% at 10 am

16% at noon

17% at 2:30 pm

14% at 5 pm

Average number of people in view from Lighthouse



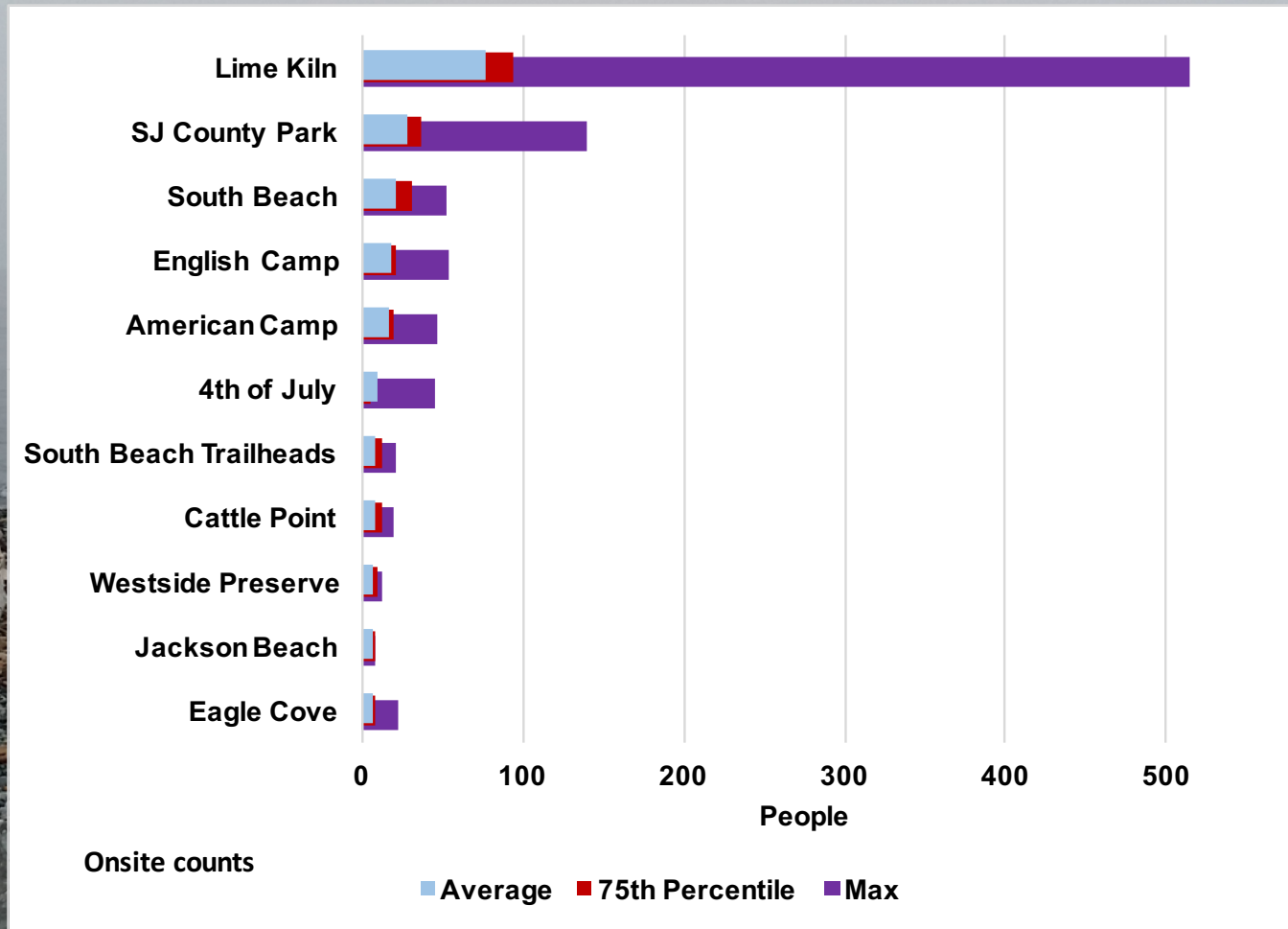
Use has increased over years

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

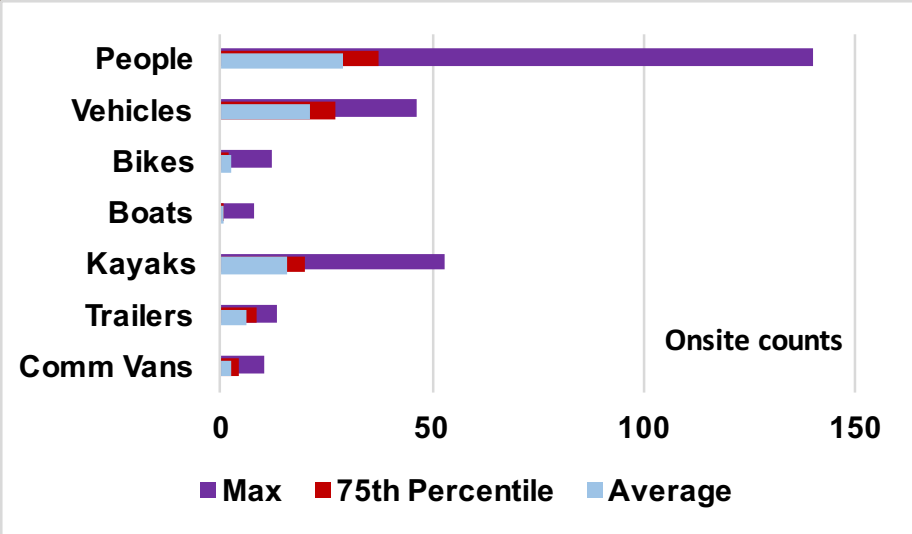
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San Juan Island – people at all sites

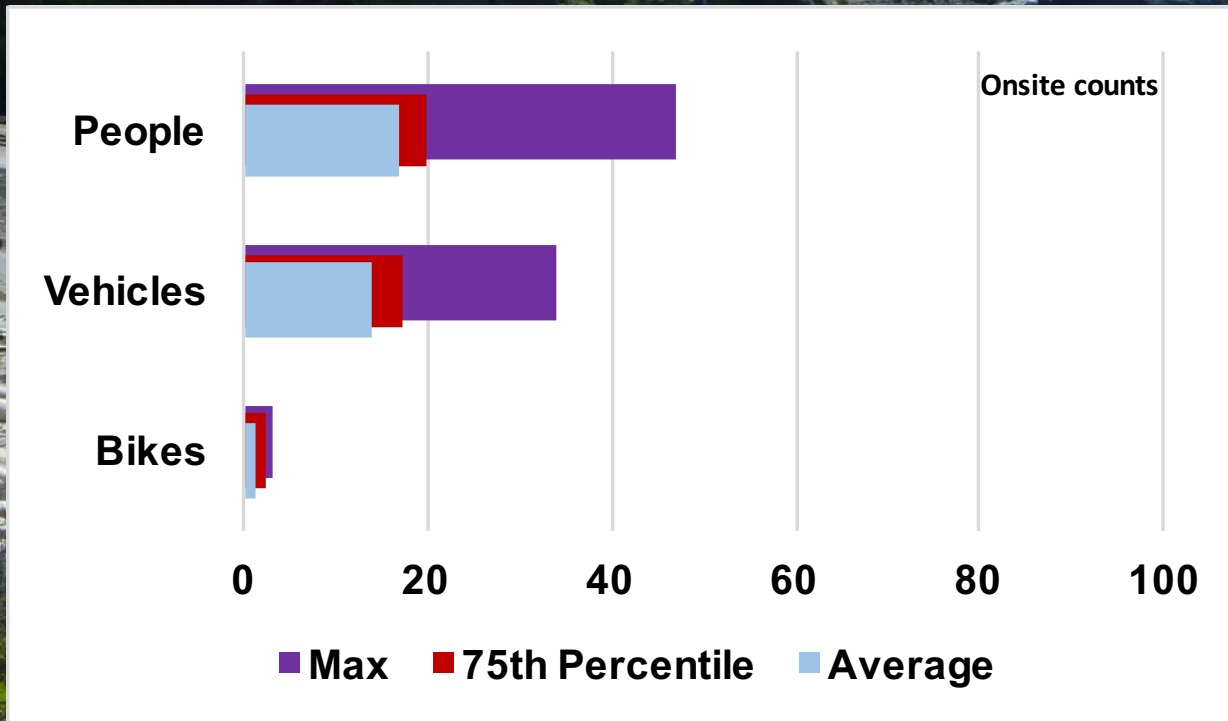


San Juan County Park

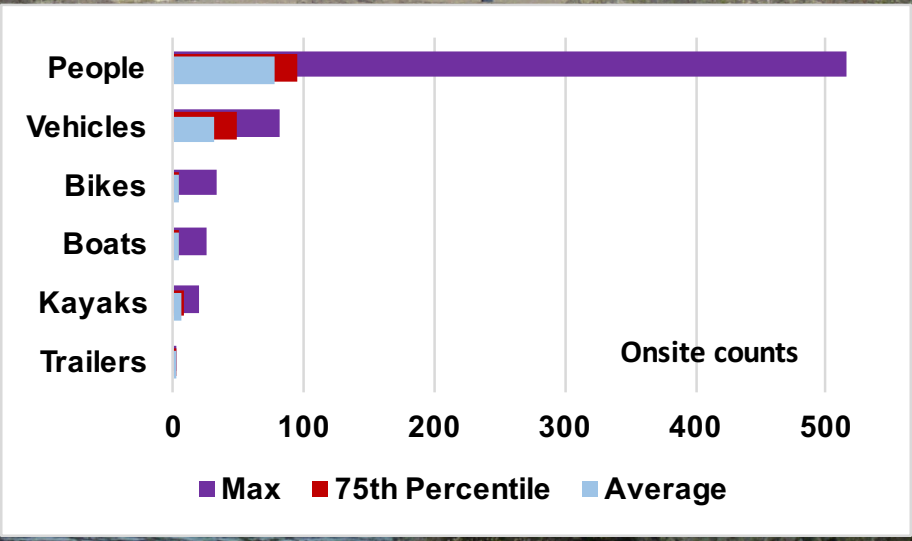
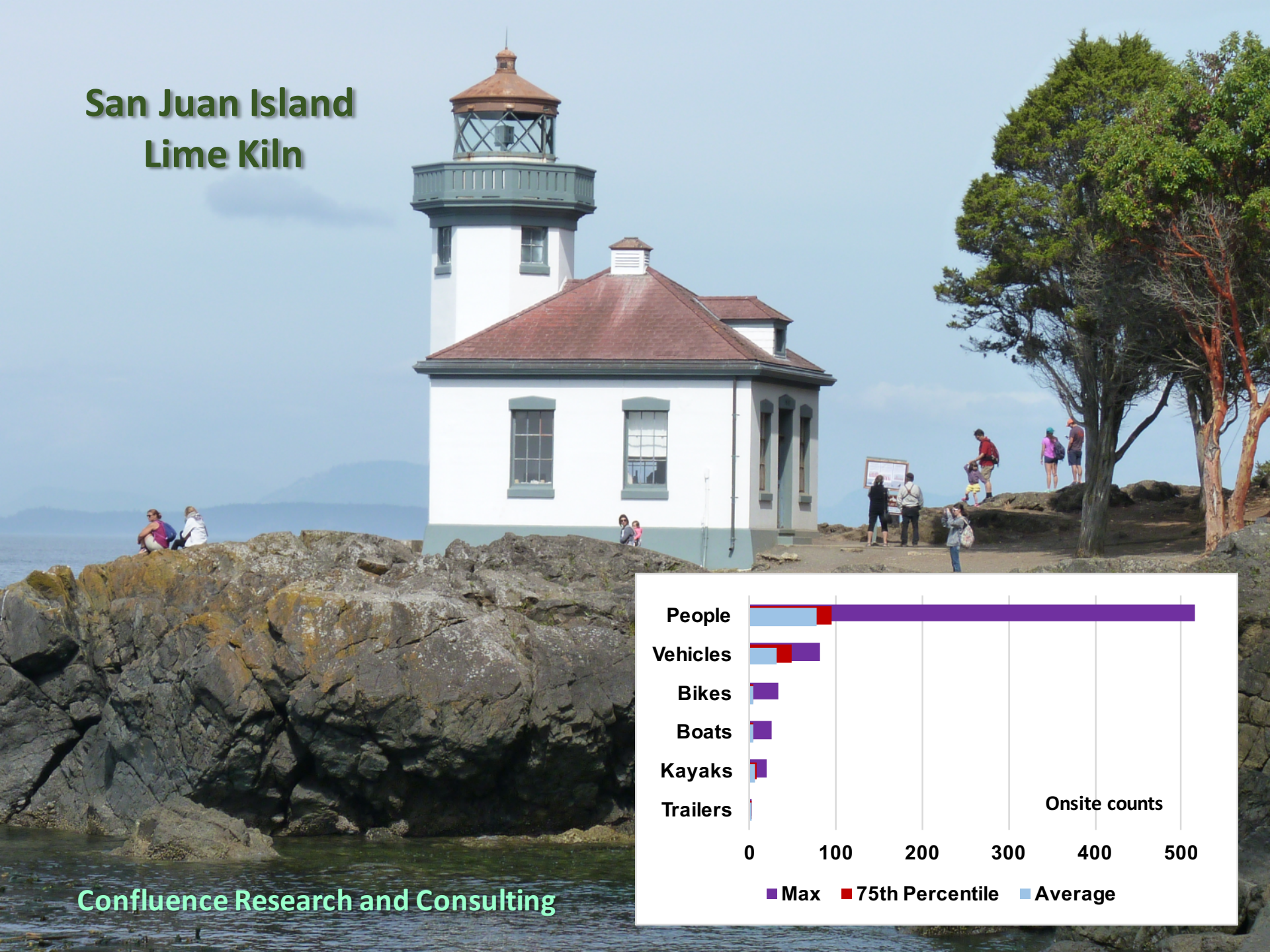
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San Juan Island American Camp



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

Avg. lighthouse visitors: 241 people

Whole park avg. visitors: 64.8 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)

Onsite counts

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)

Onsite counts

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)

Onsite counts

Crowding

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

Crowding

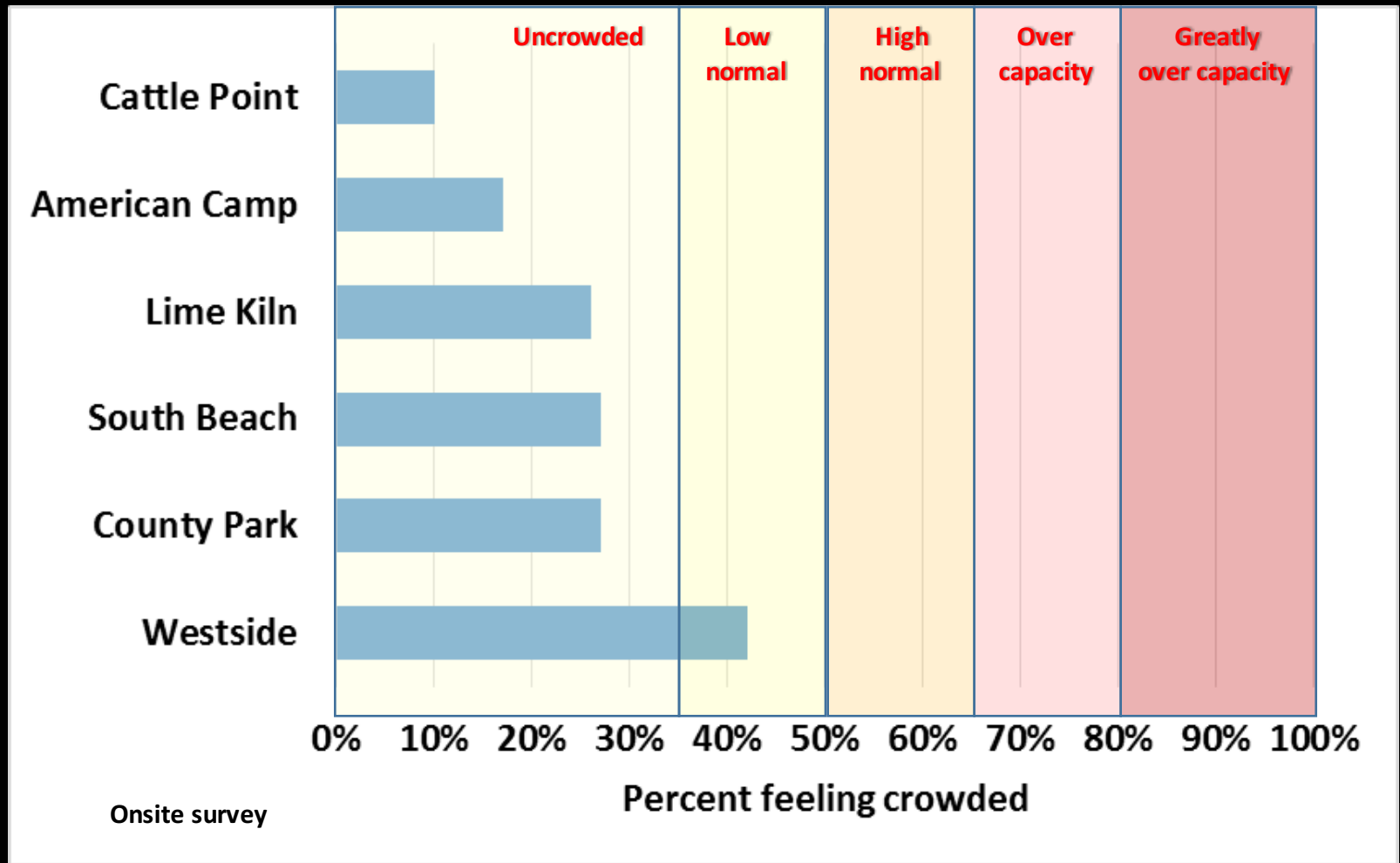
**“How crowded did you feel
in the following locations during your visit?”**

	Not at all crowded		Slightly crowded		Moderately crowded			Extremely crowded	
	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...**

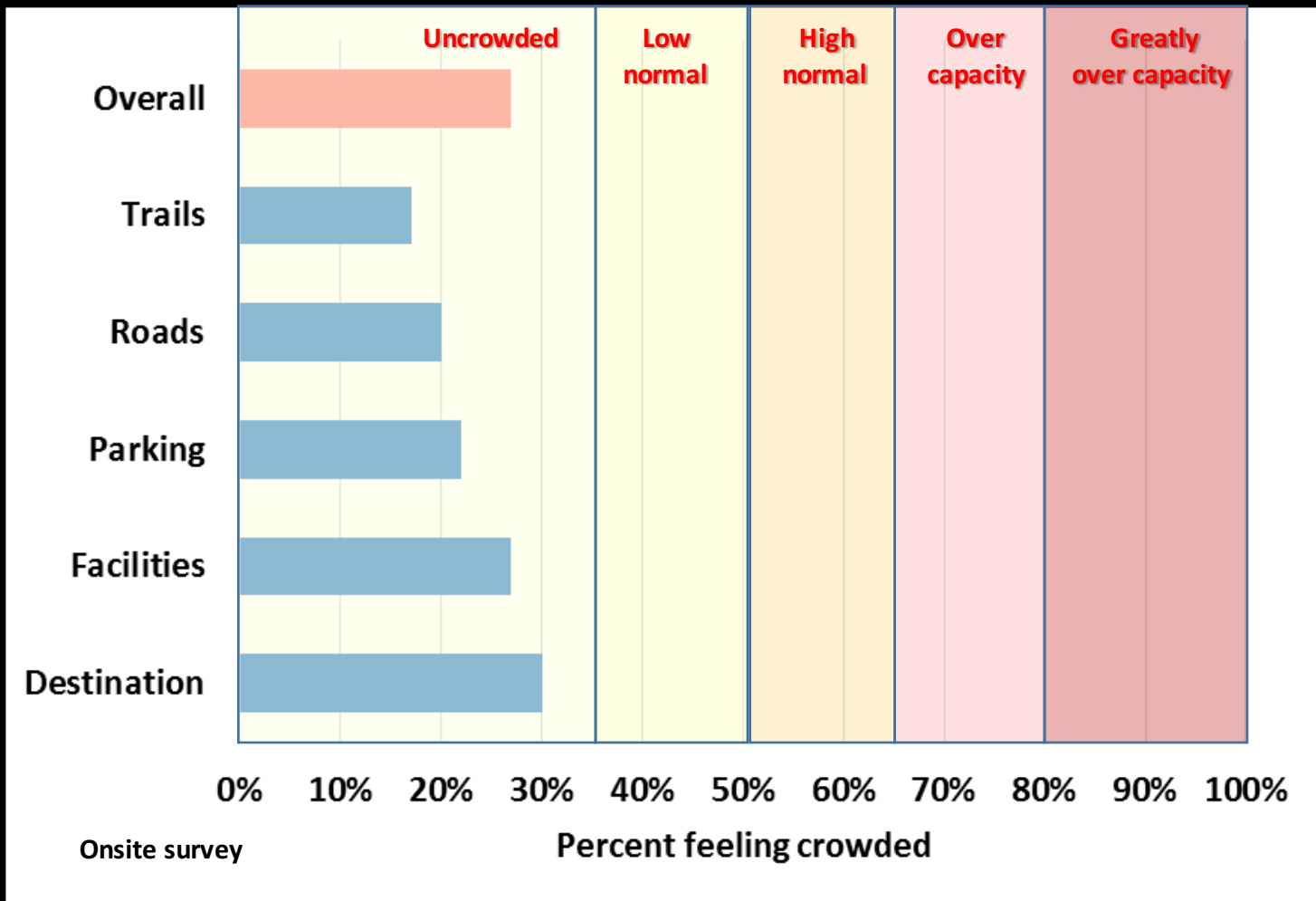
“Rule of thumb” indicator of capacity...

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

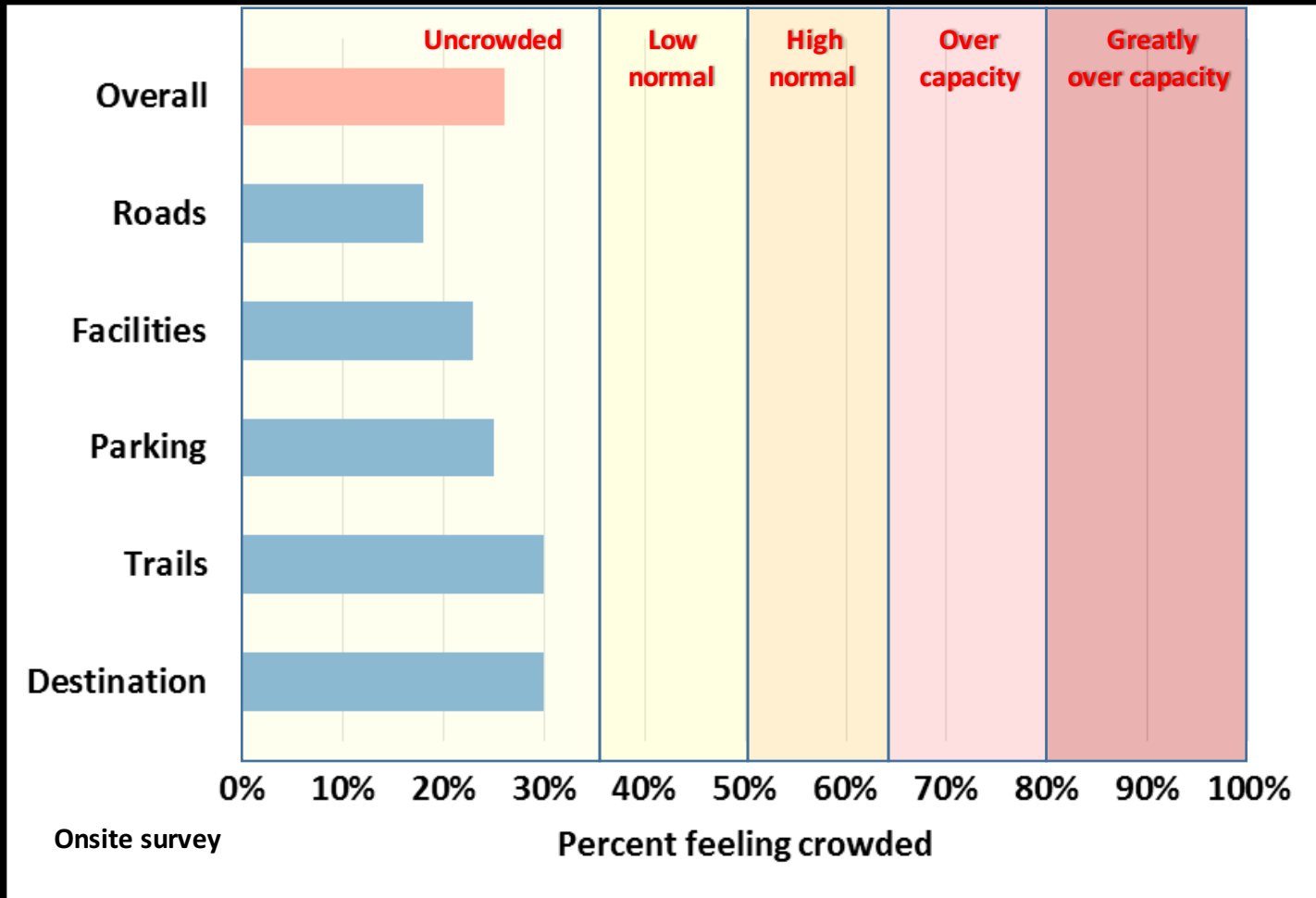


Surprisingly low levels of crowding (compared to other islands' sites)
Especially Lime Kiln and County Park (see further analysis below)

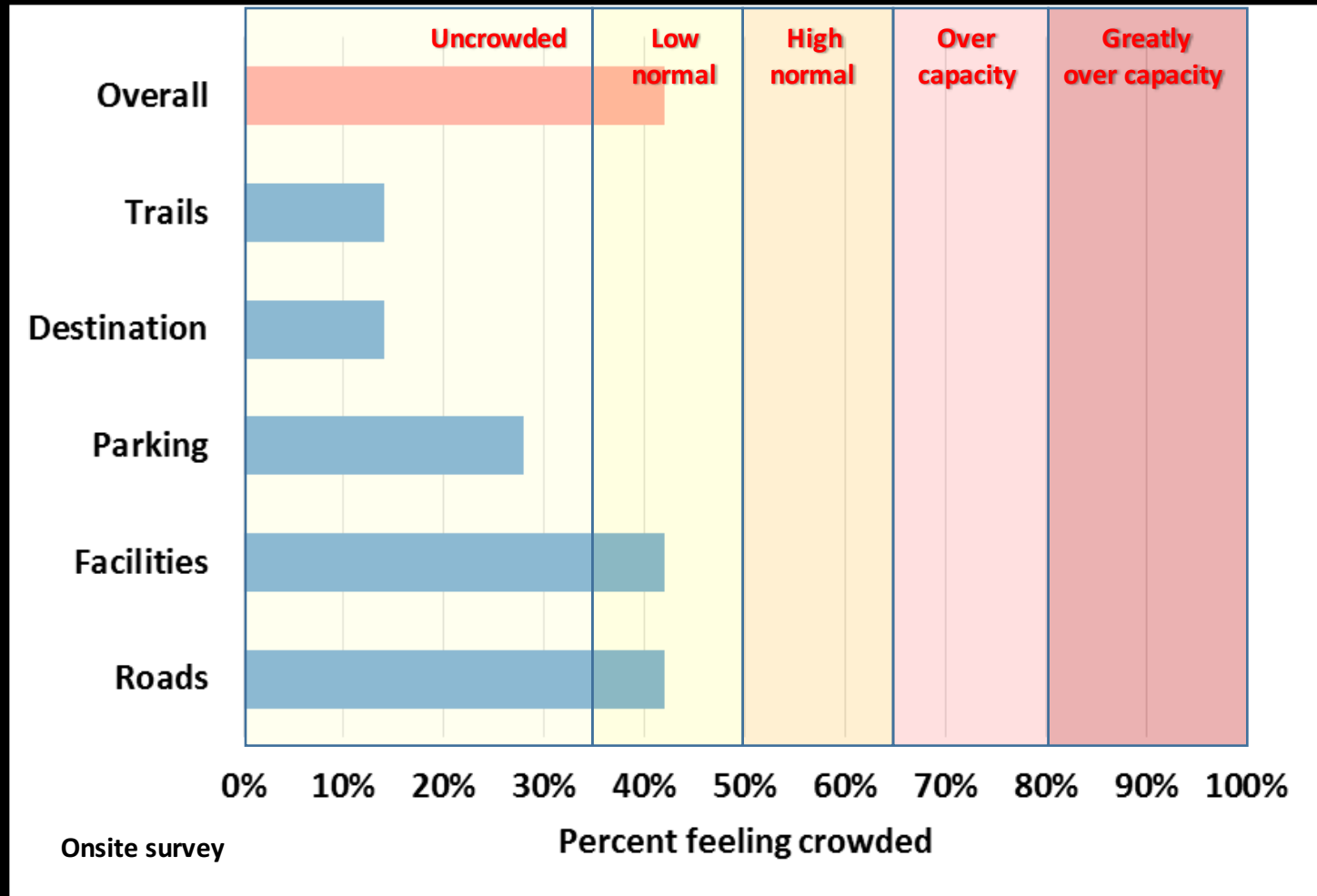
San Juan Island – Percent feeling crowded at County Park



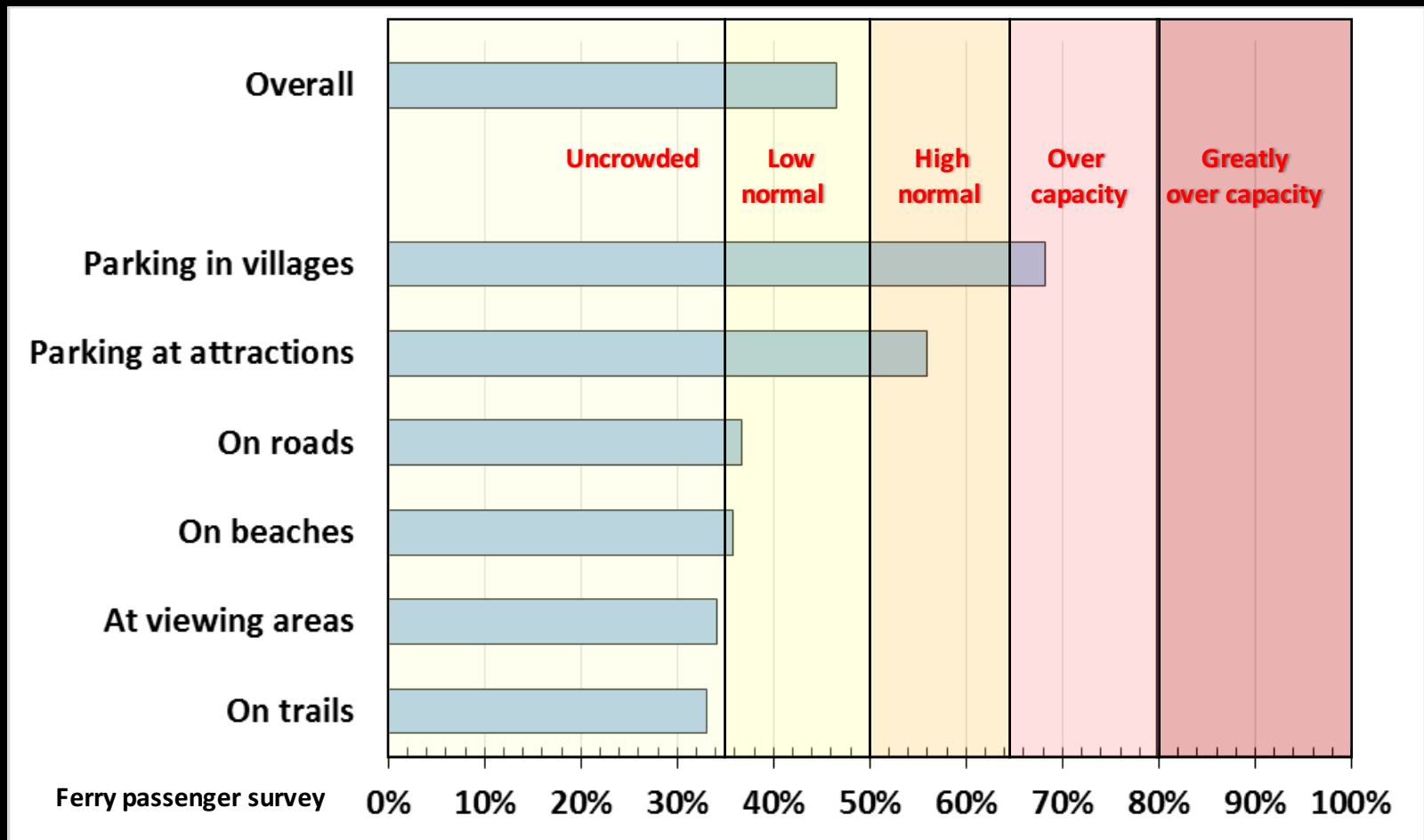
San Juan Island – Percent feeling crowded at Lime Kiln



San Juan Island – Percent feeling crowded at Westside Preserve



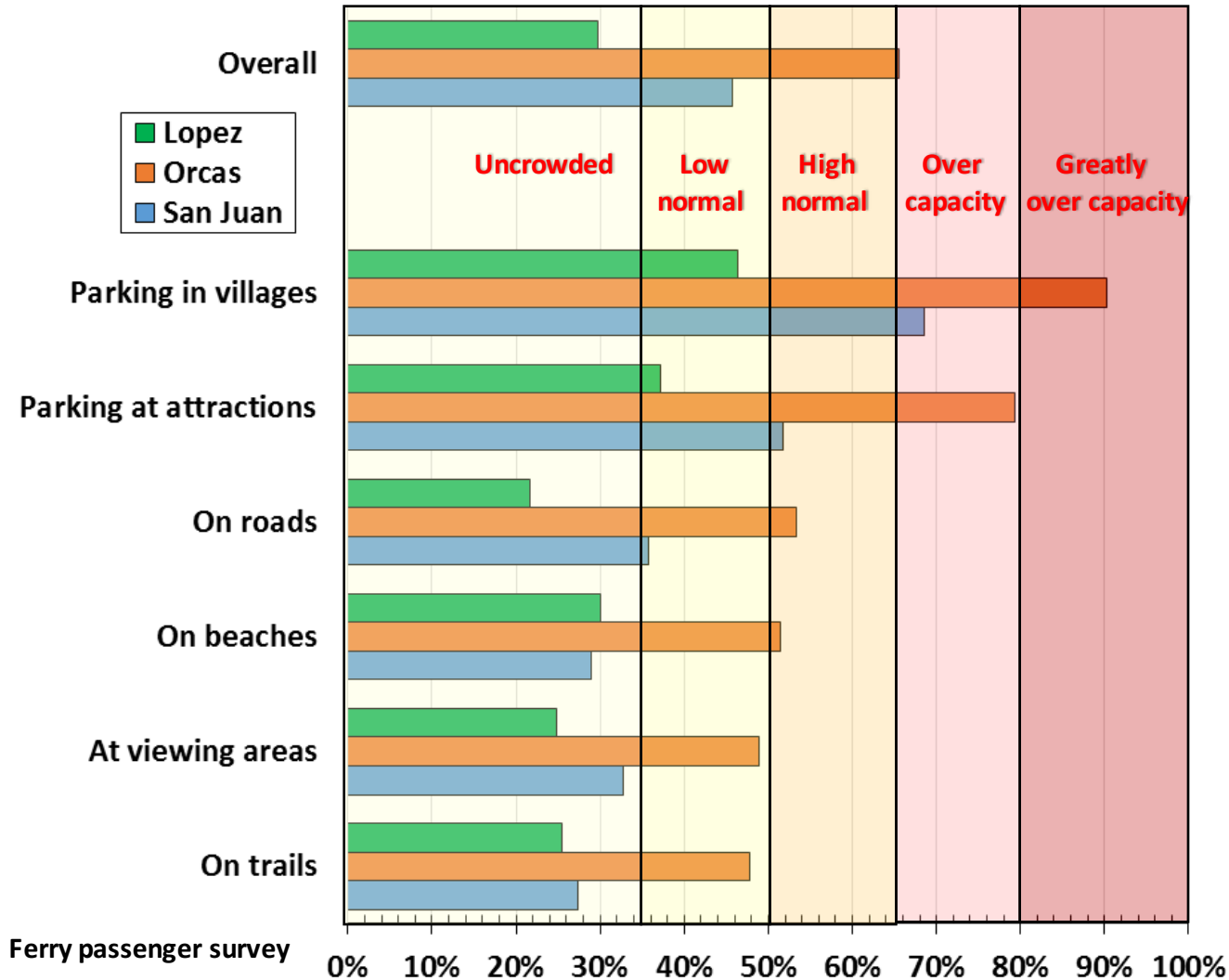
Percent of all ferry visitors feeling crowded



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

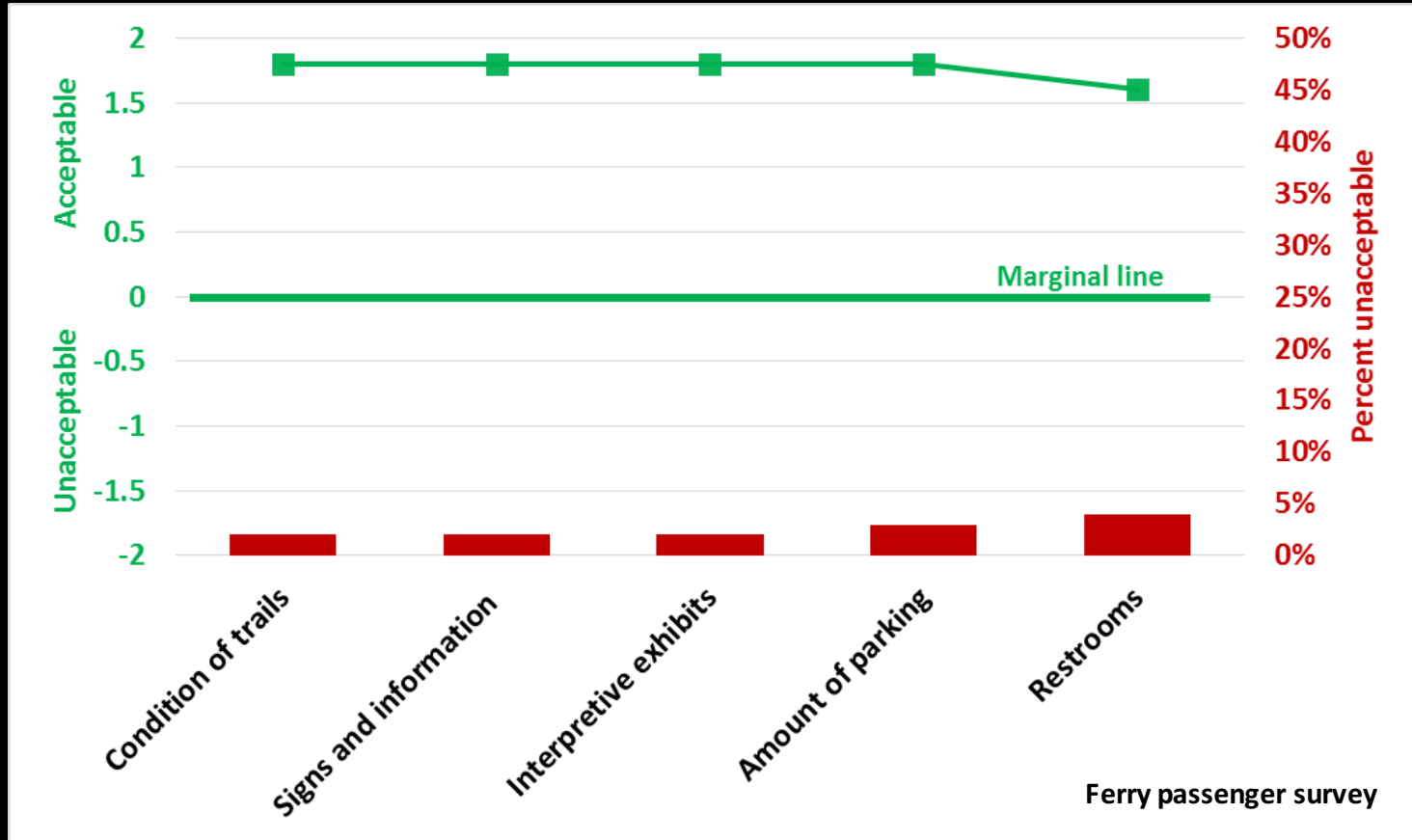
Percent of ferry visitors feeling crowded – comparing islands

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)*

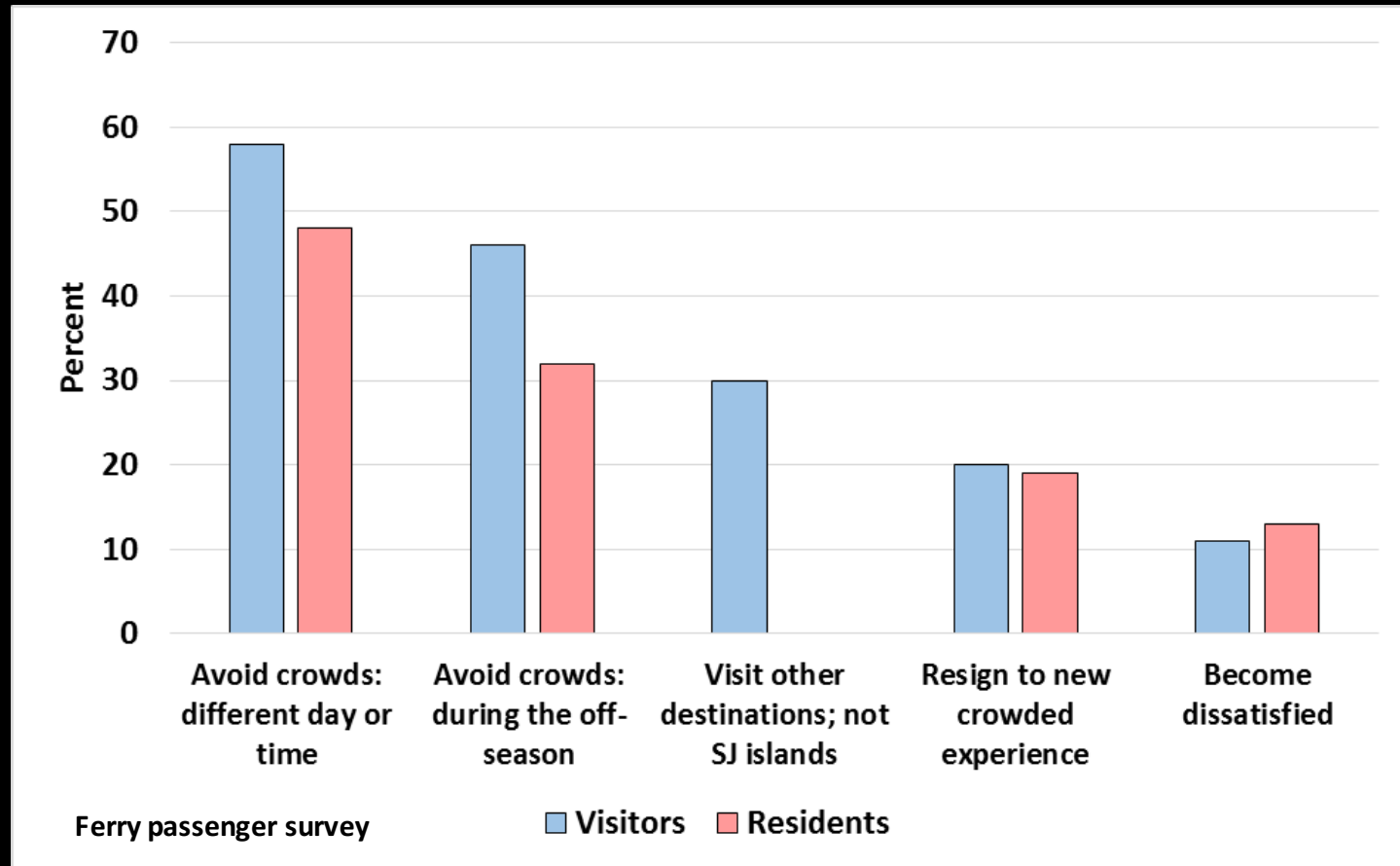
- Resign myself to the new more crowded or congested experience.
- Try to avoid crowds or congestion by visiting villages or attractions at a different day of the week or time of day.
- Try to avoid crowds or congestion by visiting villages or attractions during the off-season.
- Become dissatisfied.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

Beach Photos

©CRC

Photo A



Photo B



Photo C



Photo D

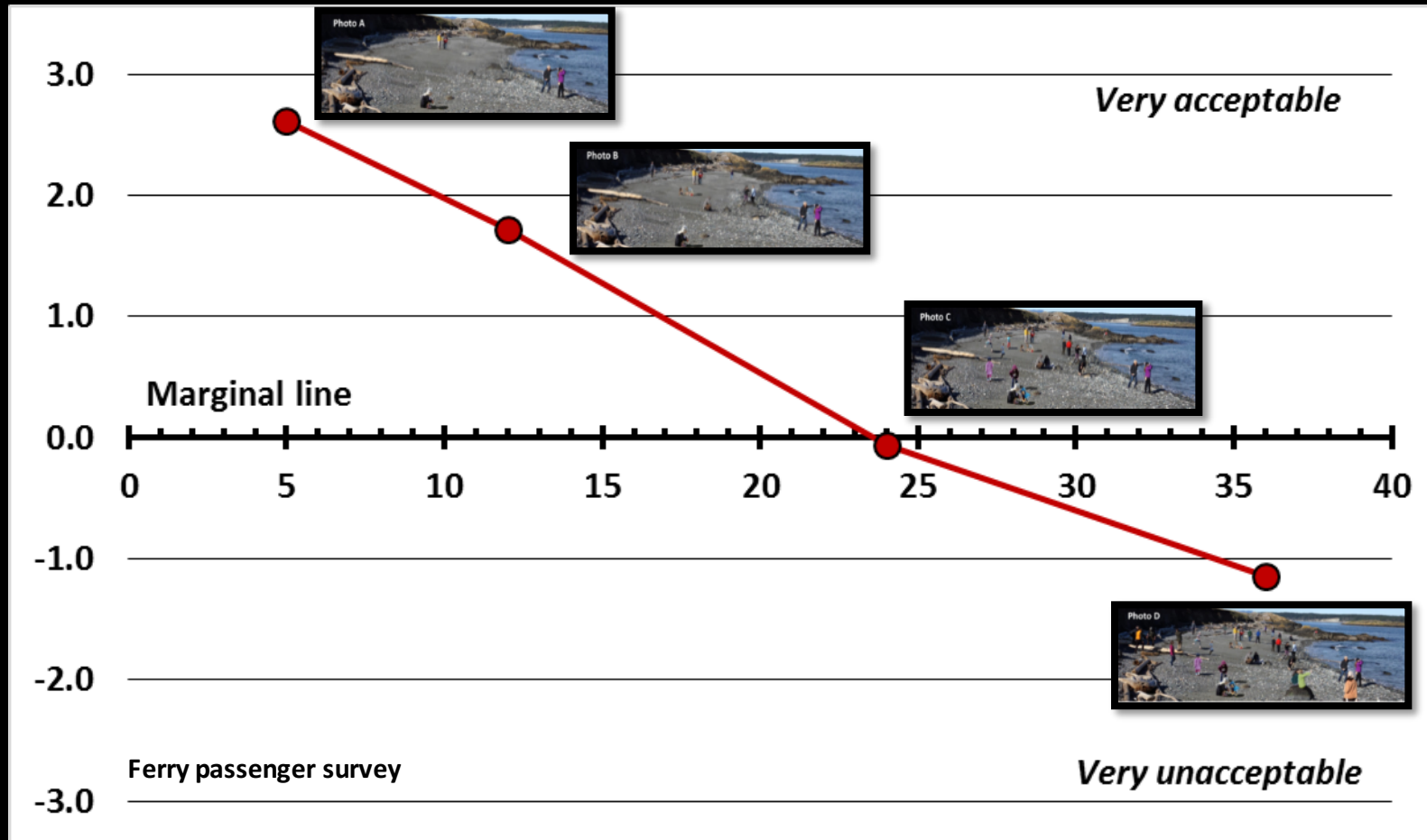


Evaluating use at
beaches

Ferry survey

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

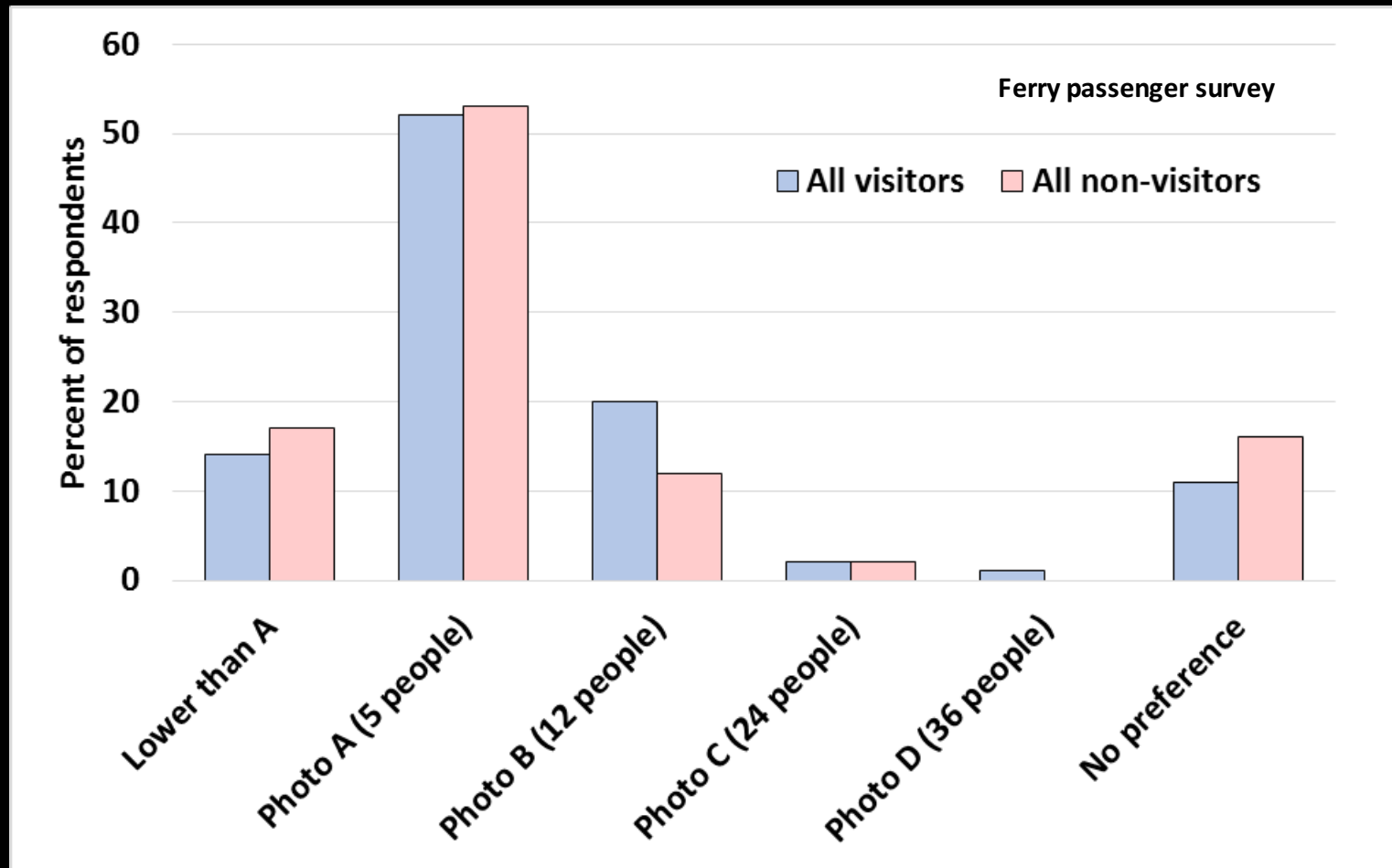
Evaluating beach densities: All respondents



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

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

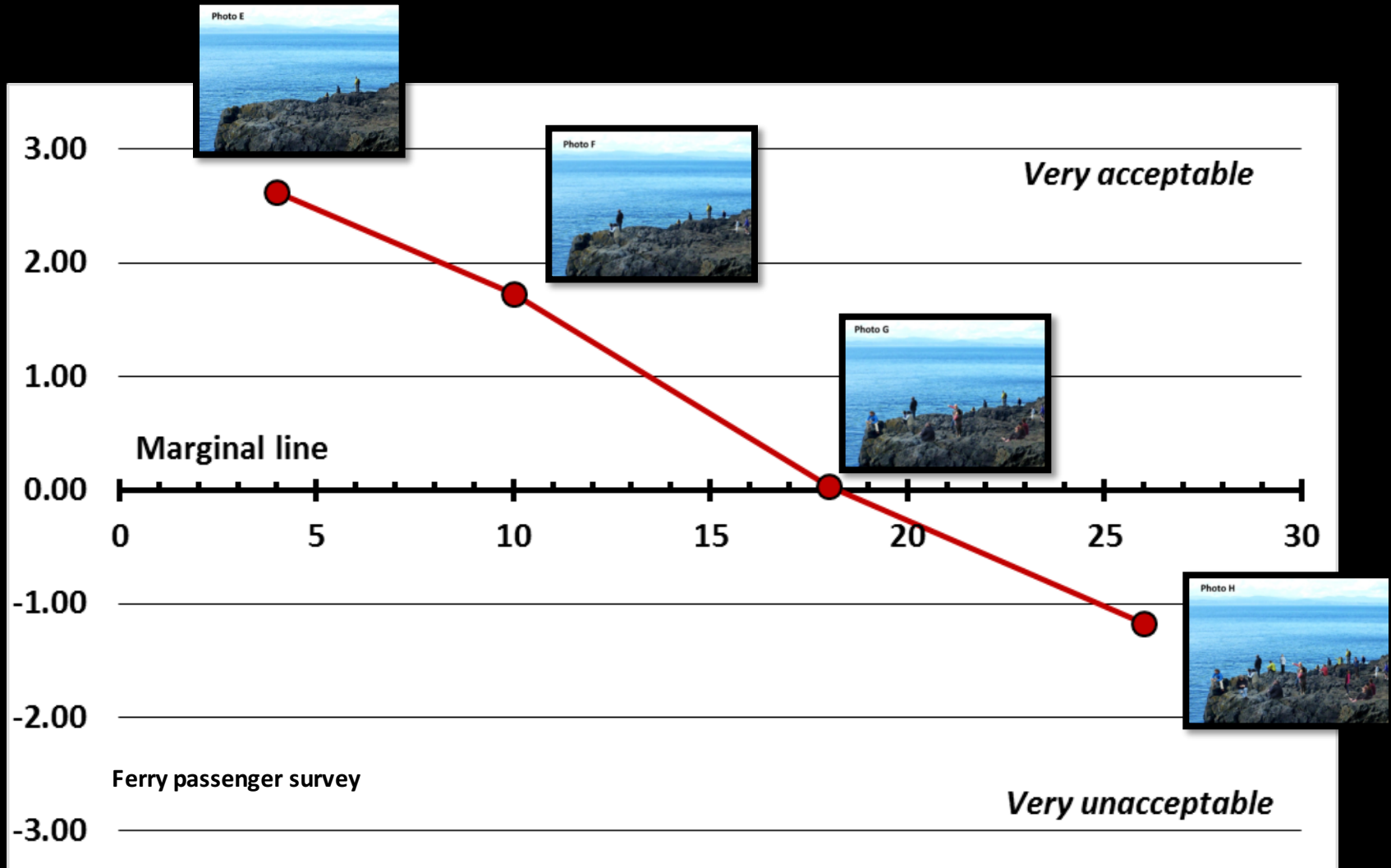


Photo H



“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



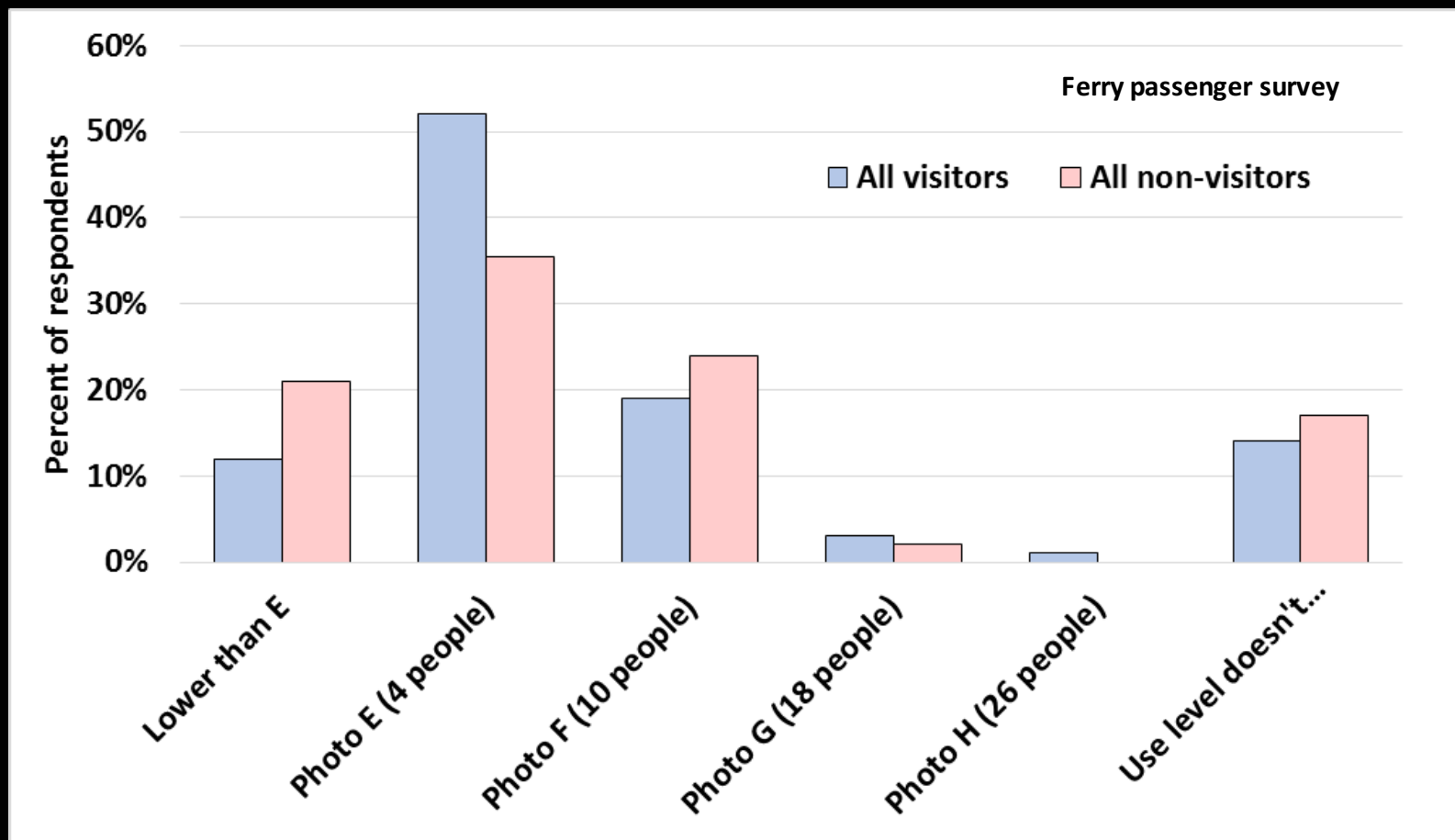
4 and 10 people acceptable; 18 at margin; 26 clearly unacceptable

Few statistical differences between islands or visitors/residents

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

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

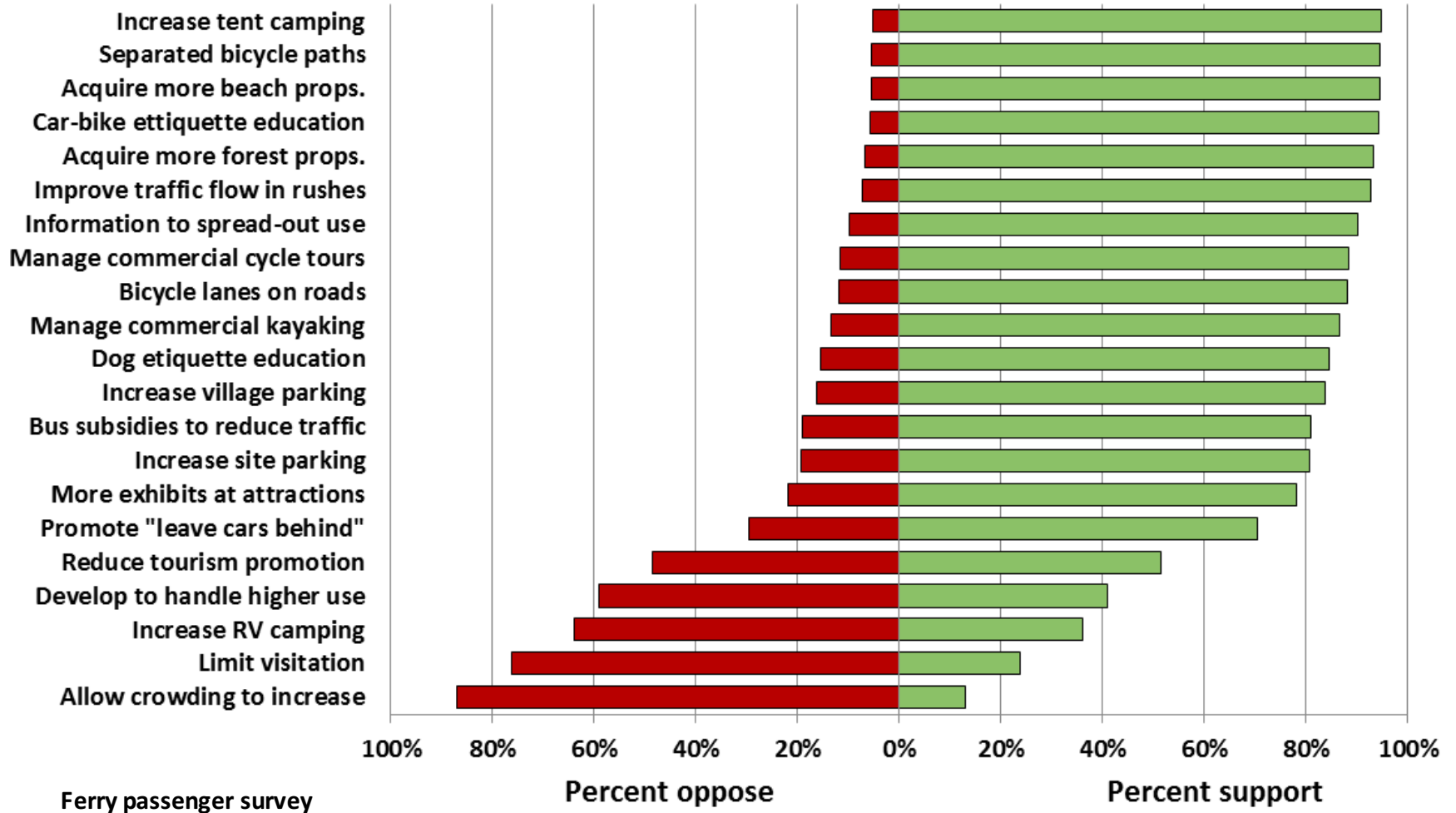
Support for management actions

21 different actions



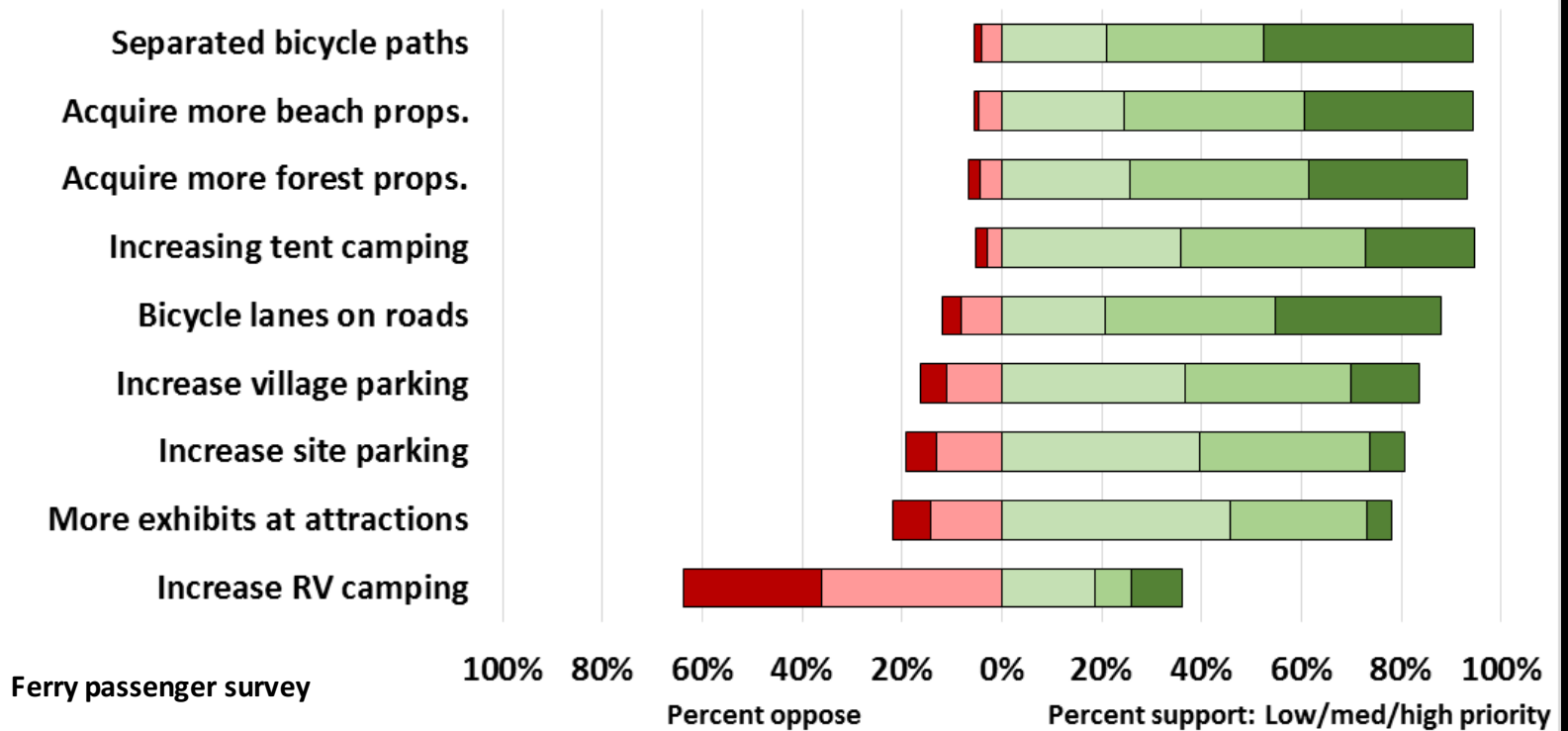
“Please tell us if you support or oppose the following actions that might be used to improve tourism in the San Juan Islands. If you support an action, identify whether it should be a low, medium, or high priority.”

Support for management actions among all visitors



Ferry passenger survey

Highest priority acquisition/infrastructure actions among visitors



More public land – shore > forest/mountain properties

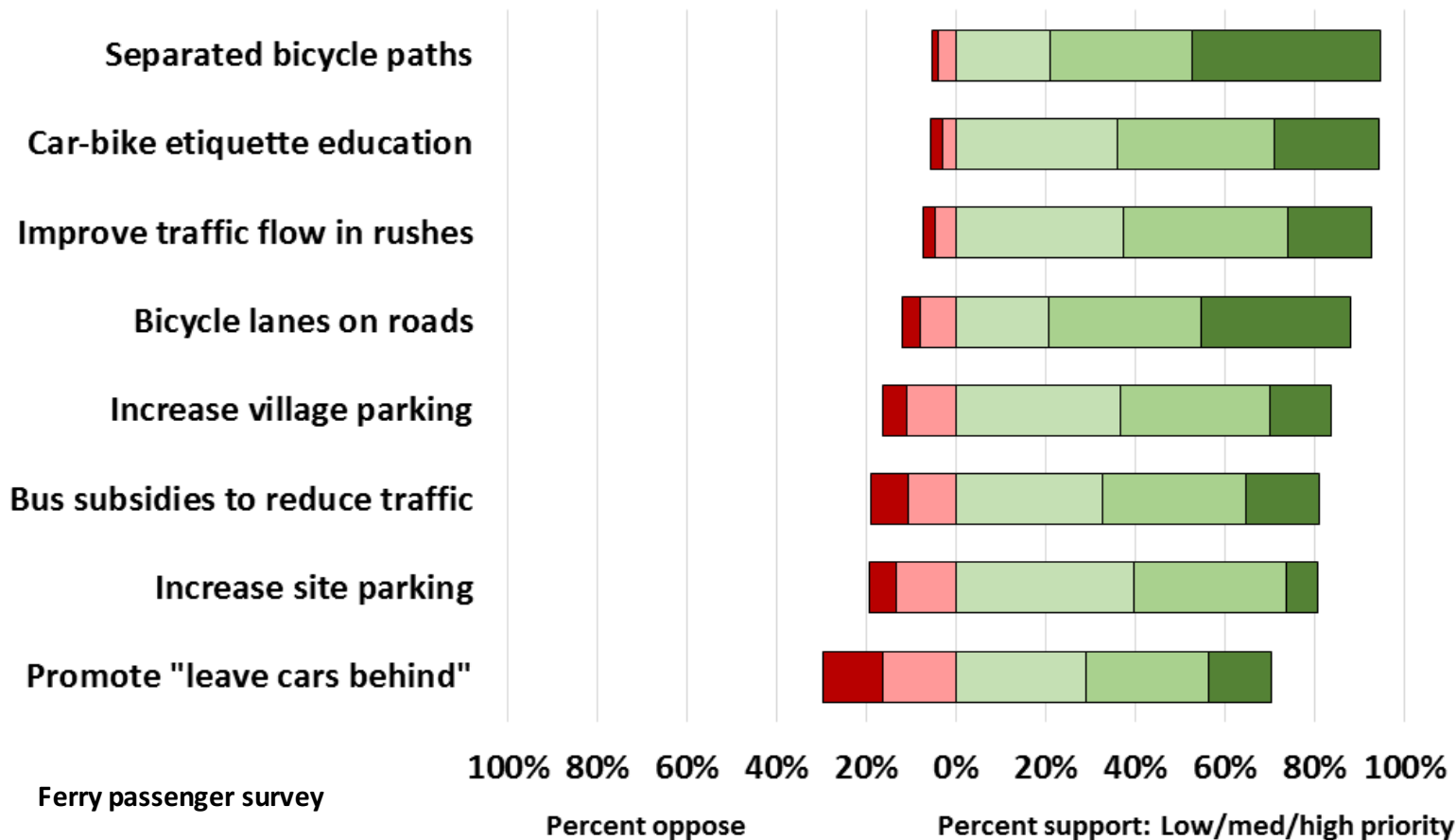
Separated bicycle lanes > roadside bike lanes

Village parking > site parking

More camping

Interpretive exhibits are lower priority

Highest priority transportation actions among visitors



Visitors support them all

Separated bike paths > etiquette > bicycle lanes on roads

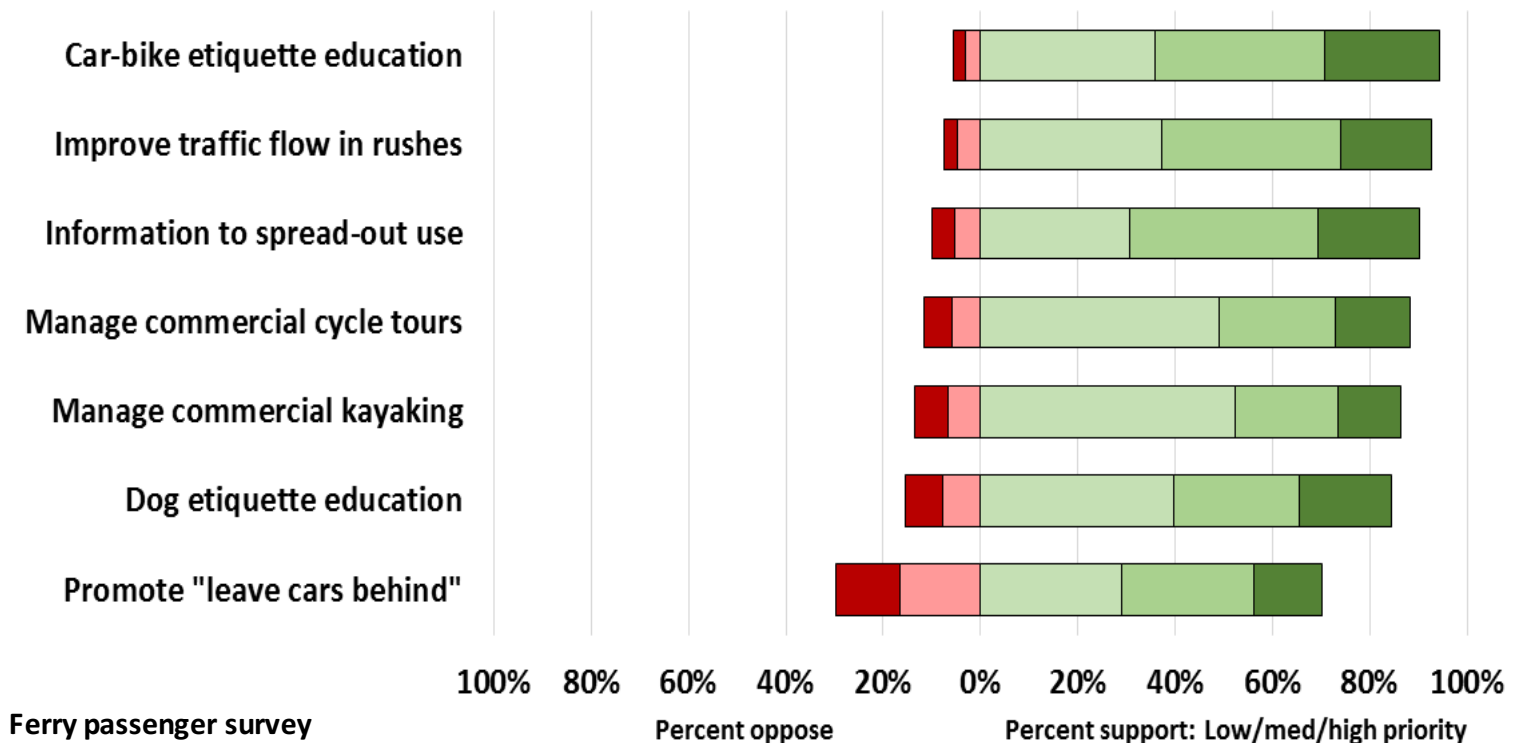
Improve traffic management in ferry rushes

Village parking > site parking

Bus subsidies > "leave cars behind"

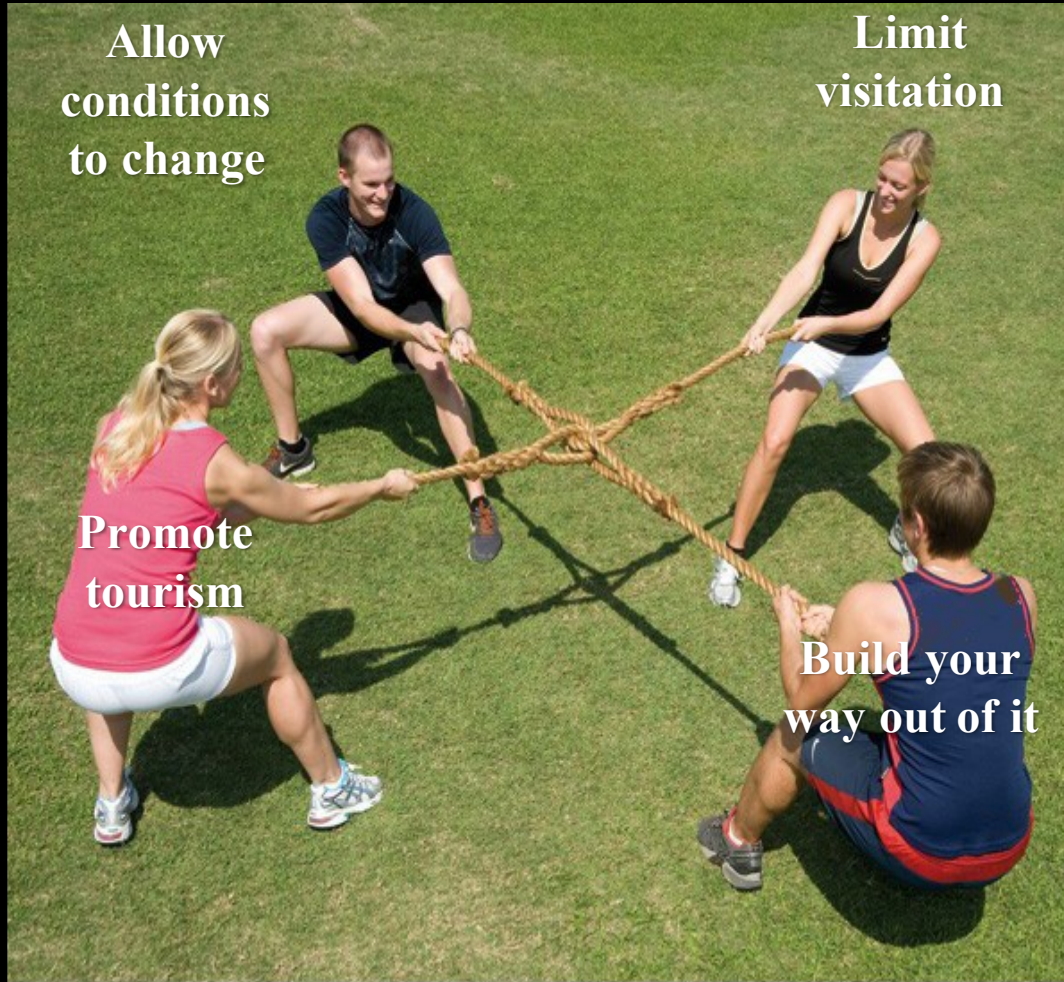
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Highest priority education actions among visitors

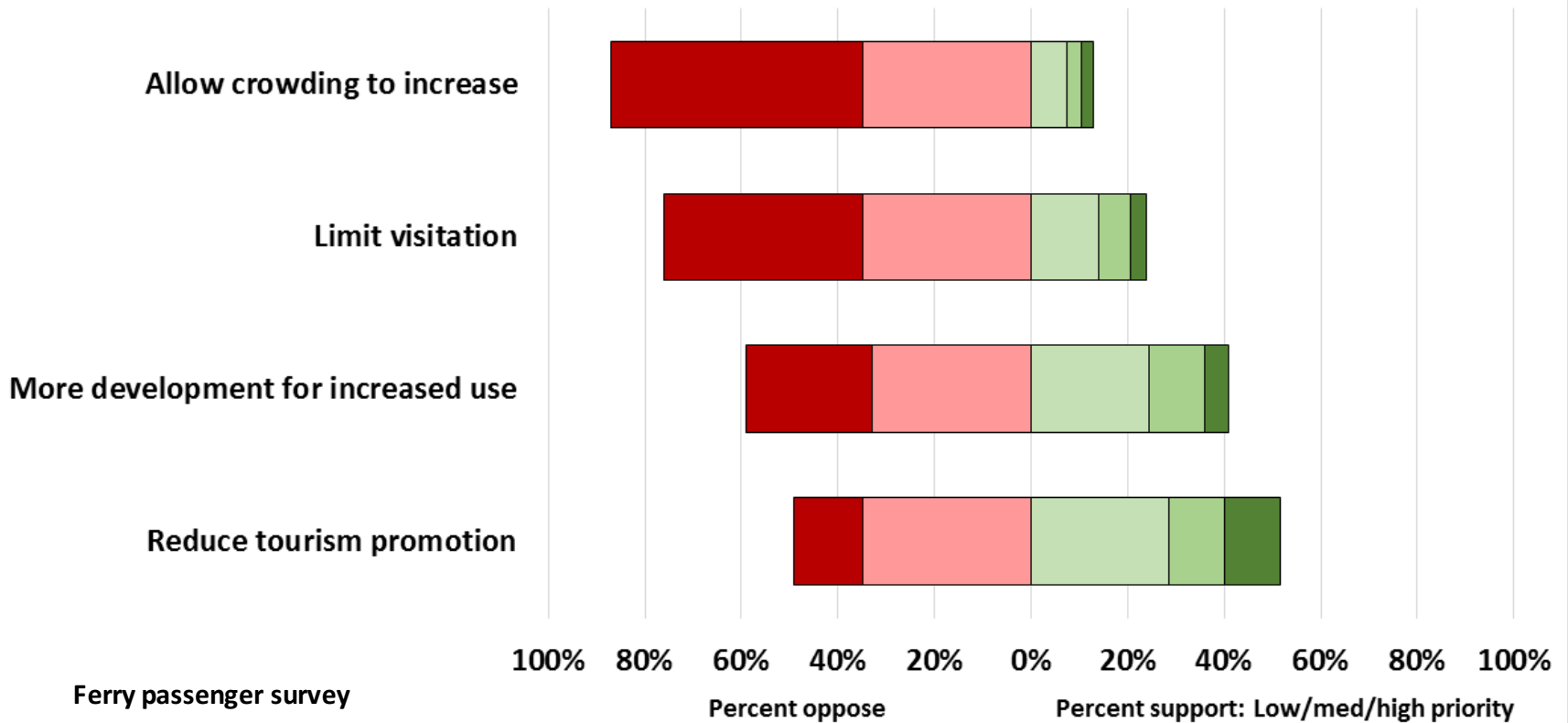


Visitors support them all
Lowest priority is promote "leave cars behind"

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

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

A scenic view of a small, forested island in the middle of a large body of water under a blue sky with scattered clouds. The island is covered in dense green trees and sits on a rocky base. The water is calm with gentle ripples. In the distance, other landmasses are visible under a clear blue sky with a few white clouds.

Questions or comments

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