

Findings from the San Juan Islands Visitor Study for Orcas Island

Presented on Monday, February 26th
at Orcas Senior Center in Eastsound, WA



Confluence Research and Consulting

Alaska office

Doug Whittaker, Ph.D.
6324 Red Tree Circle
Anchorage, Alaska 99507 USA
Email: dougwhit@alaska.net
907.346.3769

Oregon office

Bo Shelby, Ph.D.
3600 NW Thrush
Corvallis, Oregon 97330 USA
Email: bo.shelby@oregonstate.edu
541.753.0635 (office)

San Juan Islands Visitor Study

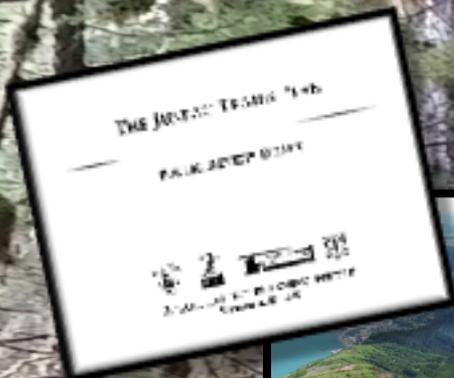
Orcas Special Edition
February 26, 2018

Confluence Research and Consulting

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



Sources of information

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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

Orcas n = 510

One page

Cascade Lake
Mountain Lake
Mt Constitution
Obstruction Pass

Sampling

- Late May through mid-September
- More in mid-summer (67% Jul-Aug)
- Morning through late afternoon
- More in afternoon (60% after 2 pm)

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"/> 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"/> Westport Scenic Preserve overlooks	<input type="checkbox"/> Cascade Lake in Moron State Park	<input type="checkbox"/> Lopez Beach Sanctuary
<input type="checkbox"/> Line 4th State Park / Lighthouse State Park	<input type="checkbox"/> All Constitution in Moron State Park	<input type="checkbox"/> Volney Place
<input type="checkbox"/> County Park / Small Fox Cove	<input type="checkbox"/> Hiking trails in Moron State Park	<input type="checkbox"/> Washington Bay
<input type="checkbox"/> Michael Park / Small Fox Cove	<input type="checkbox"/> Observation Pass State Park	<input type="checkbox"/> Cowles Point
<input type="checkbox"/> Young Hill trails	<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____
<input type="checkbox"/> Eagle Camp gardens and buildings		
<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	<input type="checkbox"/> Bicycling with a bike group
<input type="checkbox"/> Canoeing / paddling (with a guide)	<input type="checkbox"/> Bicycling with your bike on a rented bike
<input type="checkbox"/> Horse watching / sightseeing from a boat	<input type="checkbox"/> Fishing
<input type="checkbox"/> Horse watching / sightseeing from a private boat	<input type="checkbox"/> Swimming
<input type="checkbox"/> Horse watching / sightseeing from a charter	<input type="checkbox"/> Other _____
<input type="checkbox"/> Hiking (on a private boat)	

Reservations

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

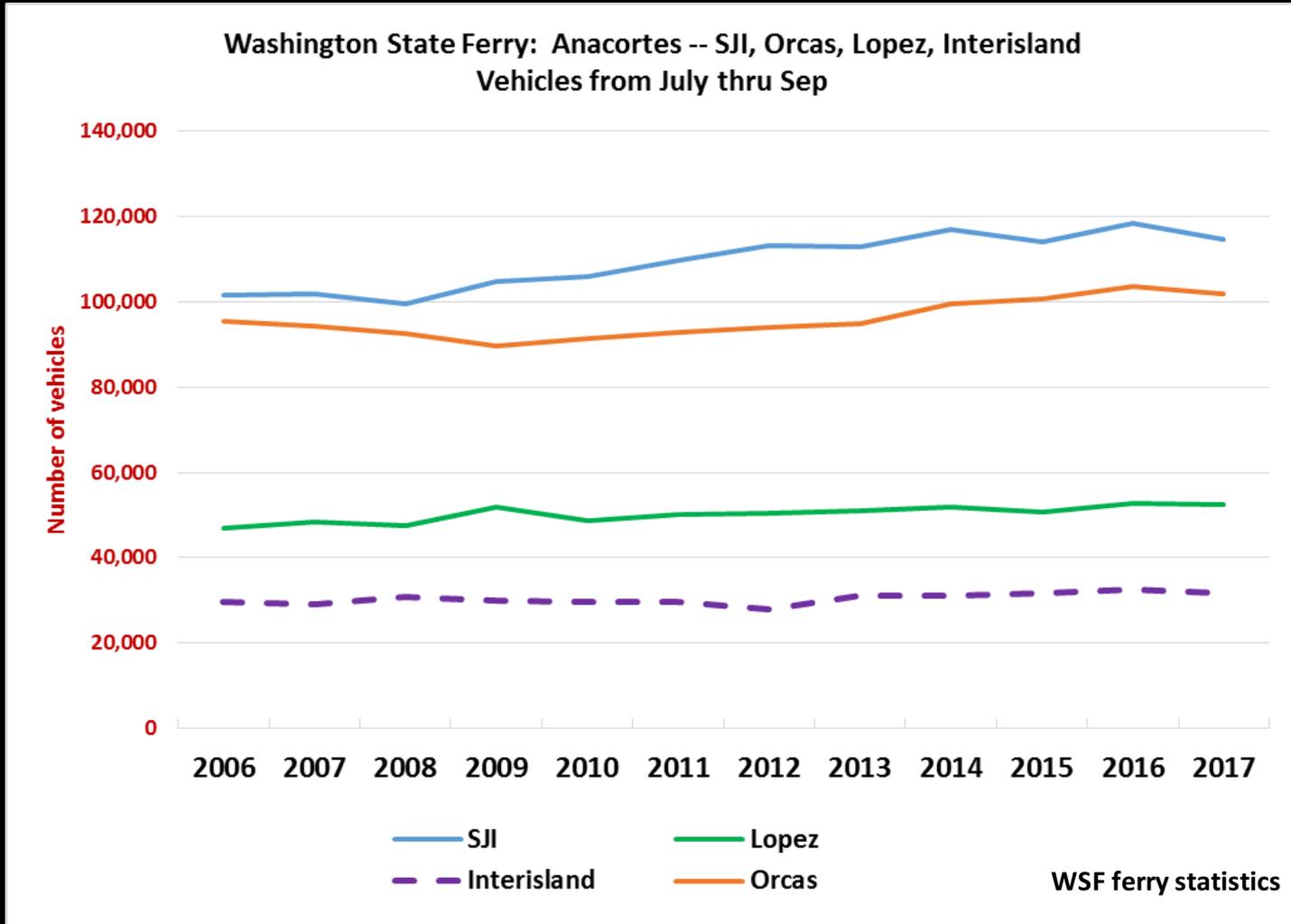


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Getting to the islands

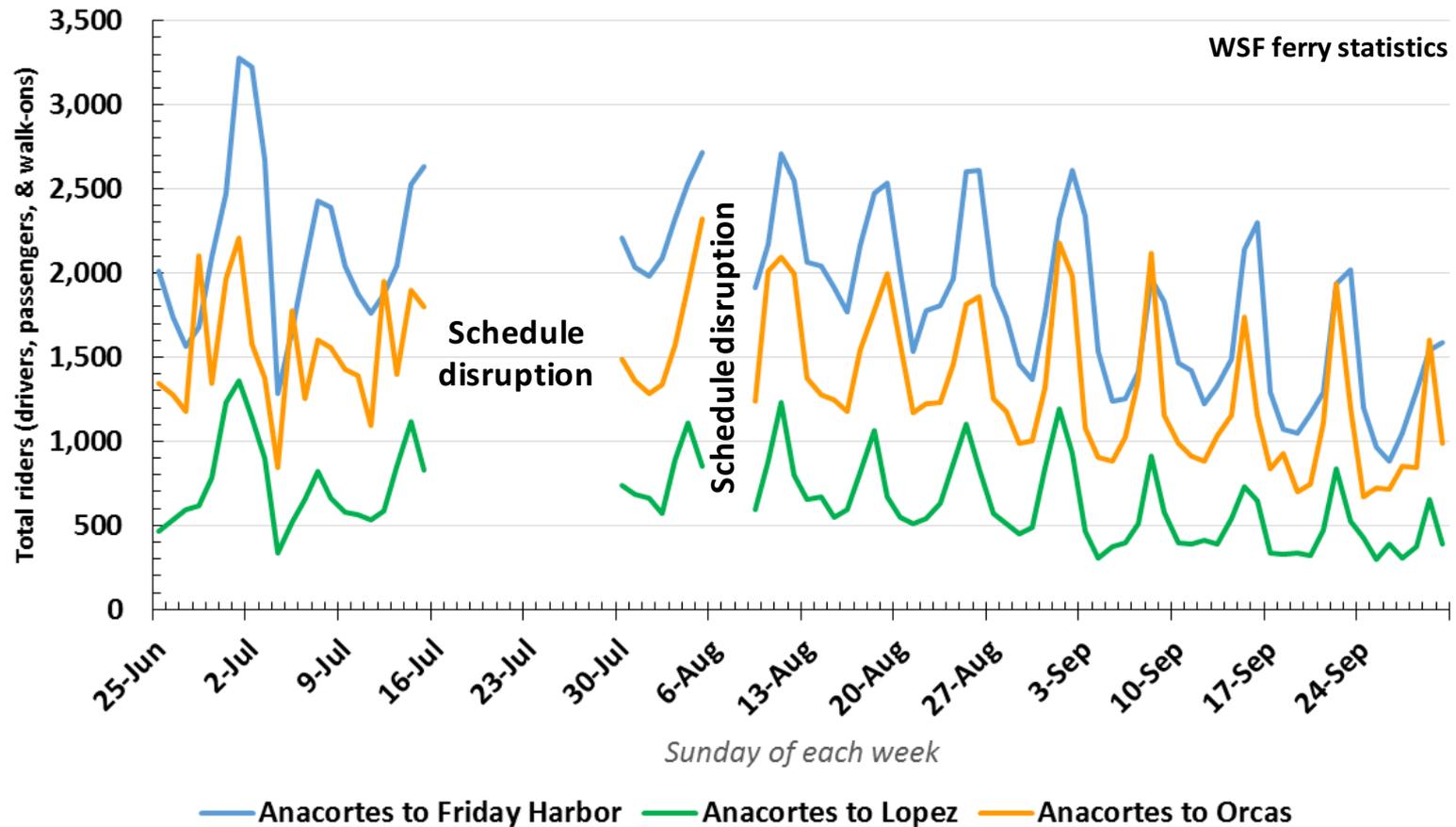
WSF stats , web-information, & interviews

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 oversized vehicles

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

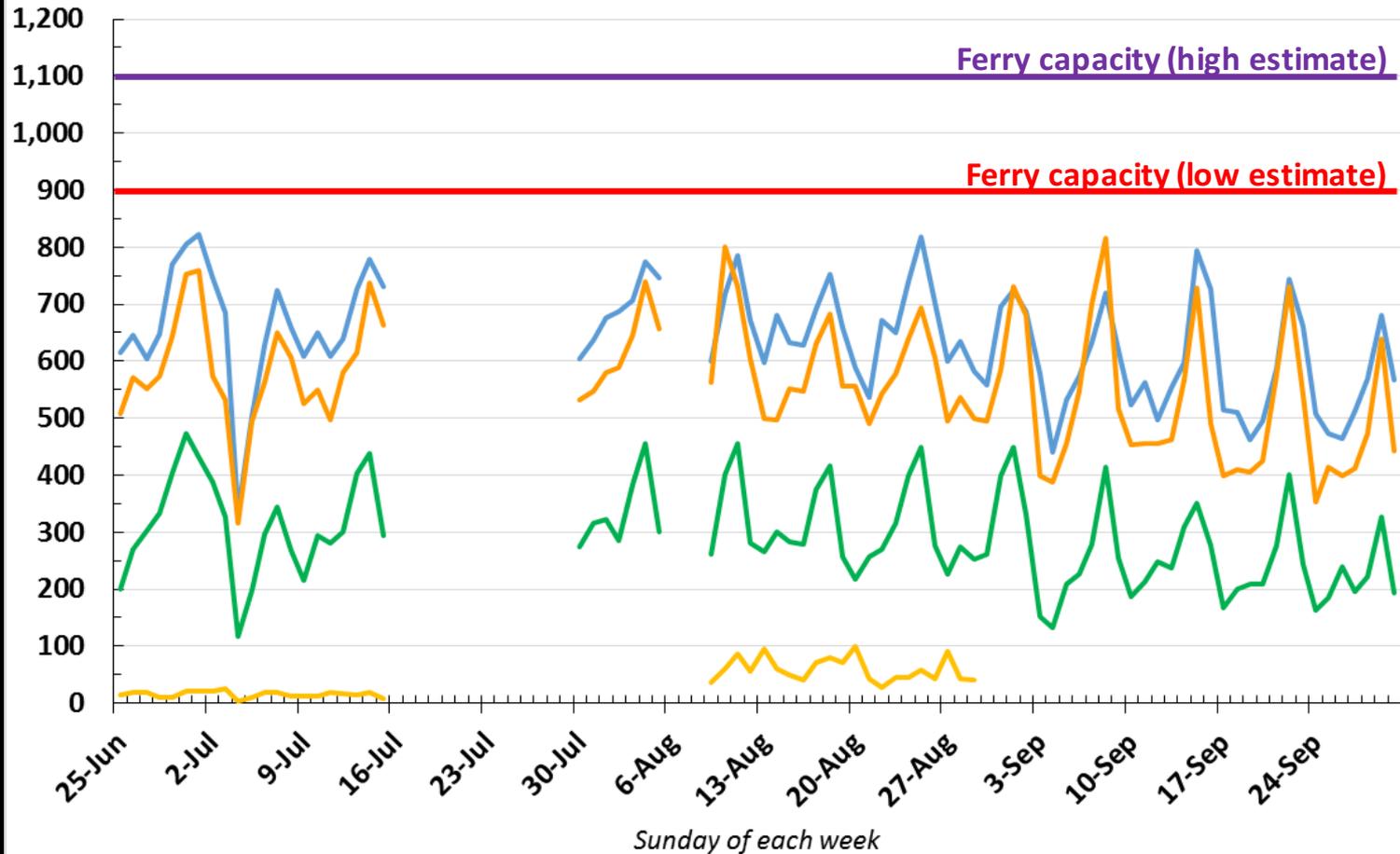
Per day capacity: ~800 to 1,000

Lopez –

- 5 direct from Anacortes + 2 to 3 with

Per day capacity: ~500 to 700

Vehicles per day by island

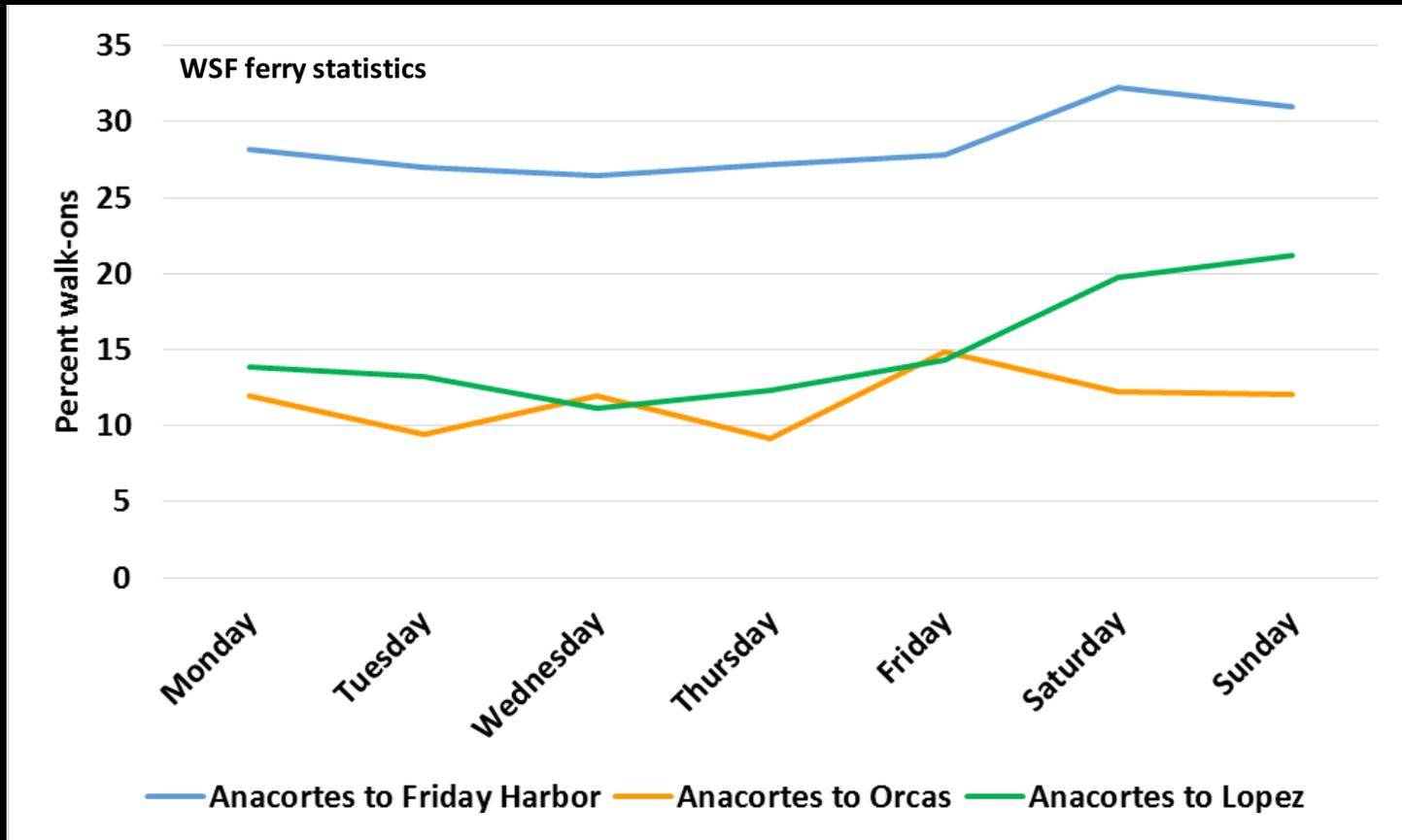


— Anacortes to Friday Harbor — Anacortes to Lopez
— Anacortes to Orcas — Sidney BC to Friday Harbor

WSF ferry statistics

San Juan and Orcas > Lopez
Consistent weekend peak pattern
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Percent walk-ons 2017



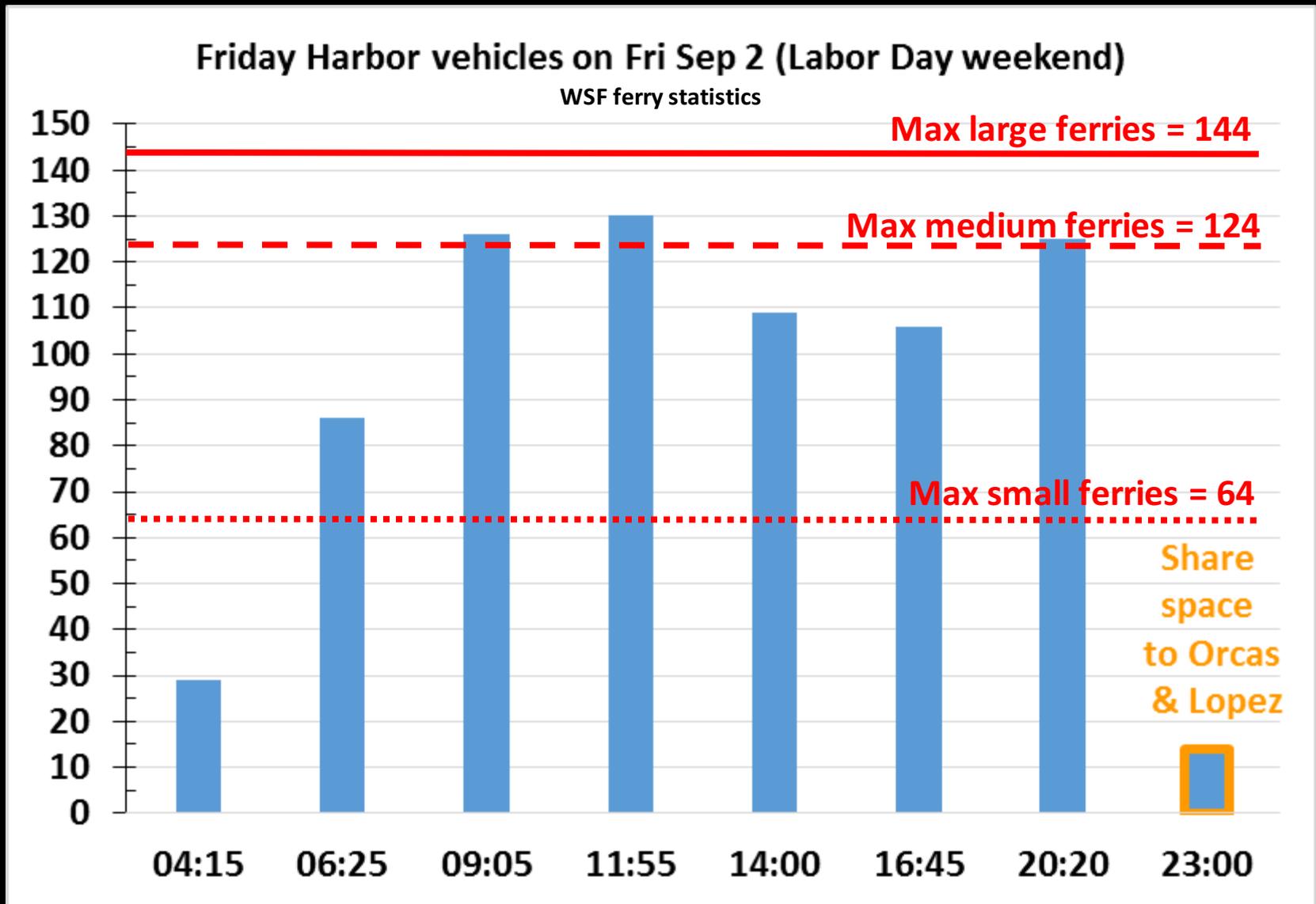
San Juan > Orcas or Lopez

Proportion of walk-ons builds toward end of the week

Short duration visitors have less need of a car?

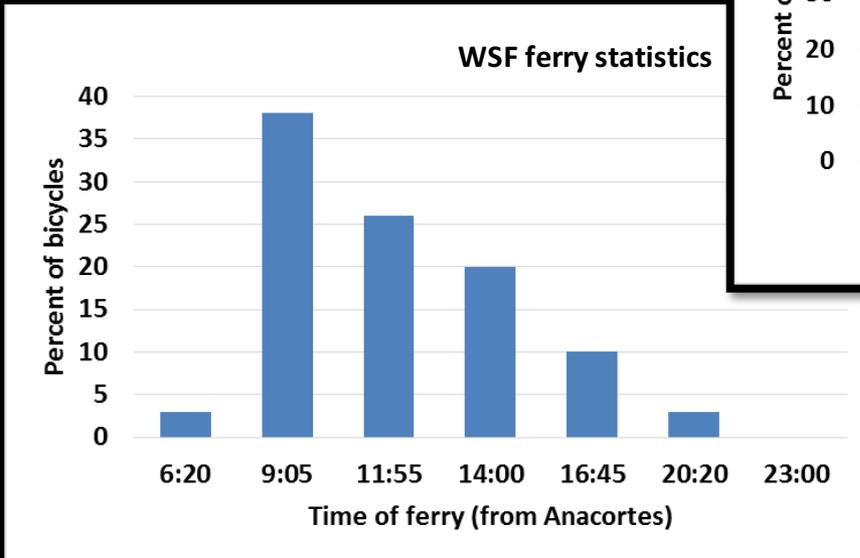
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Space for vehicles even on busy days

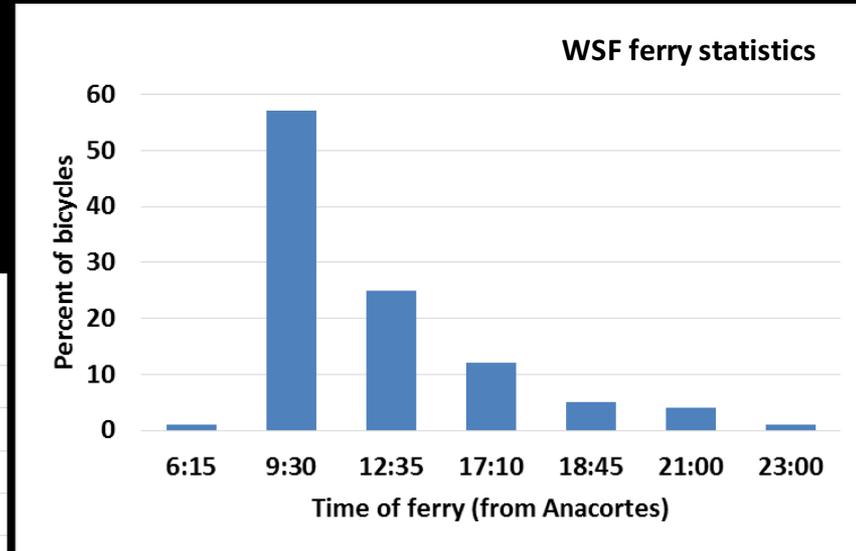


Ride-on bicycles: Percent by time of day

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

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



American Cruise Lines



Un-Cruise Adventures



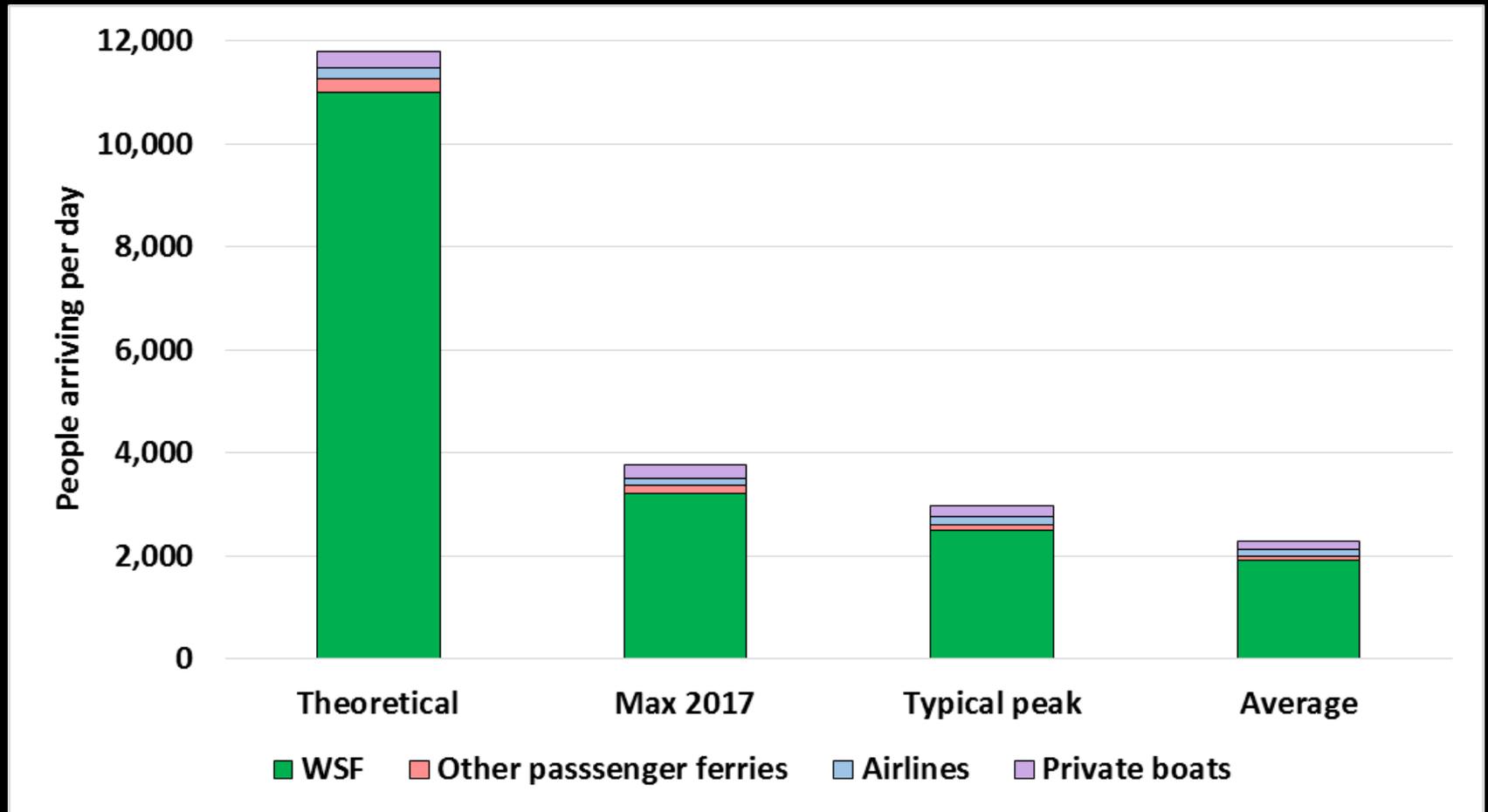
USA River Cruises

Private boats



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

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



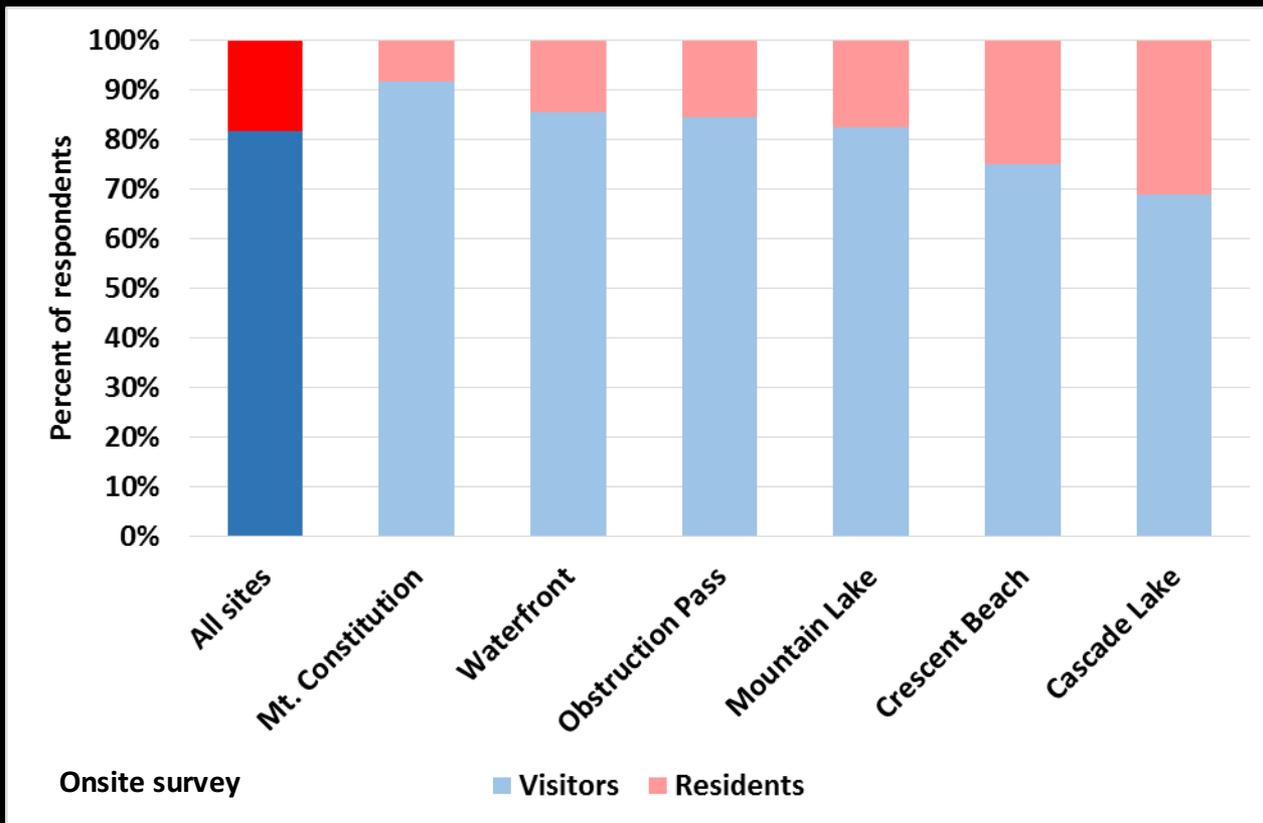


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Who are they?
From onsite and ferry survey

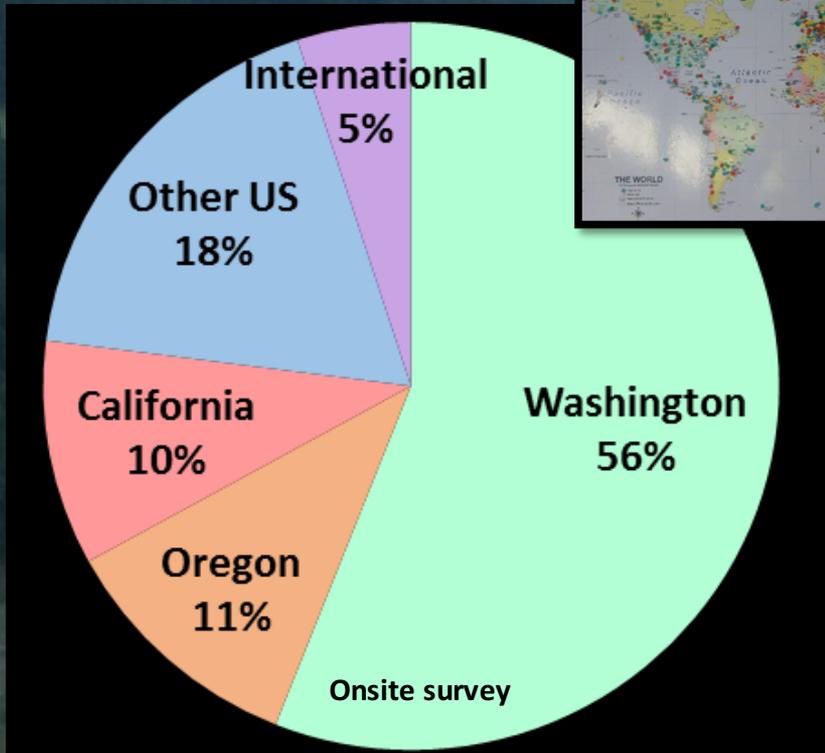
Orcas Island

Percent visitors (n=418) and residents (n=92)

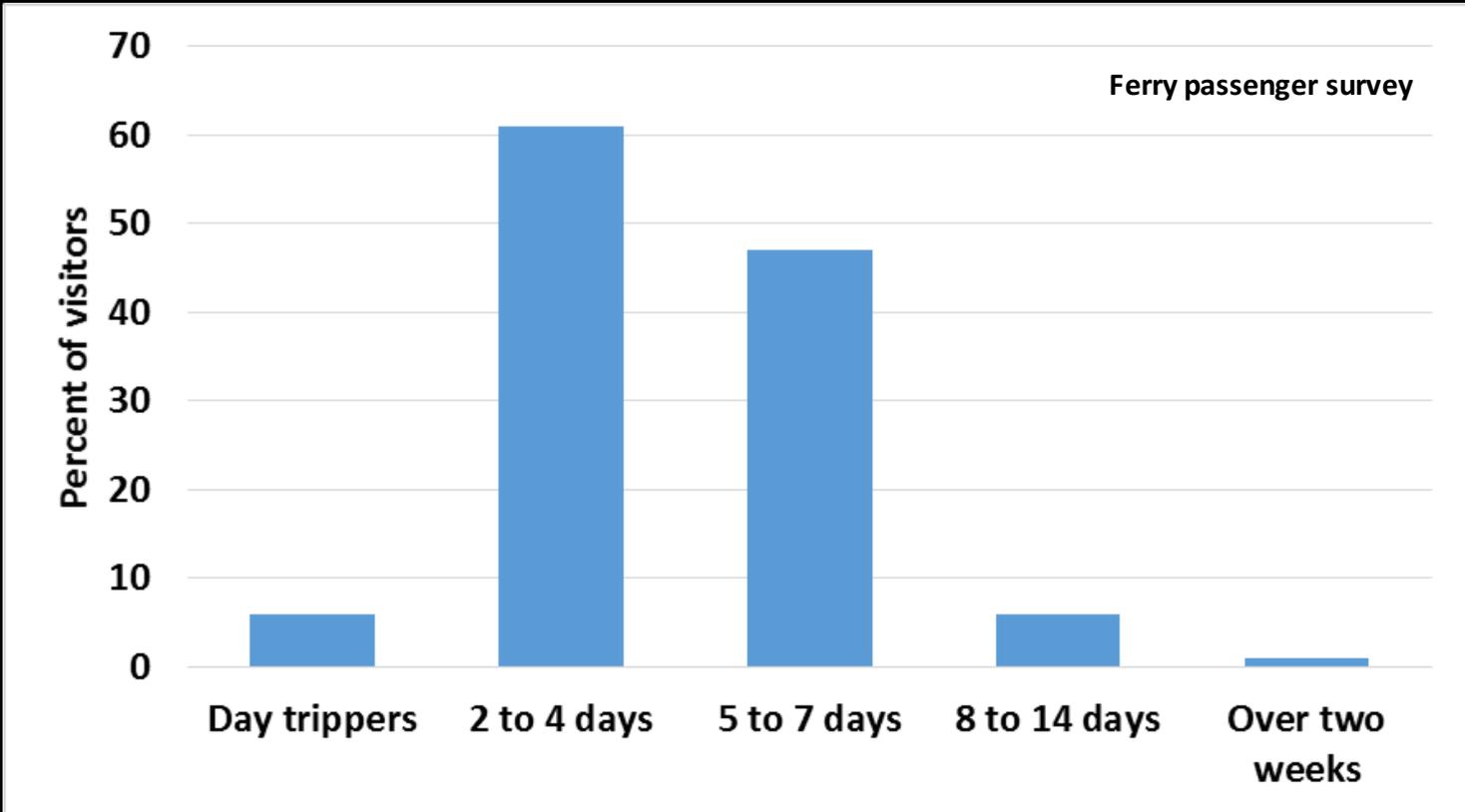


About 8 in 10 people at sites are visitors (same as Lopez)
But some sites have higher proportions (e.g. Mt. Constitution)
Cascade Lake is most popular among residents
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Orcas visitors – Where are they from?

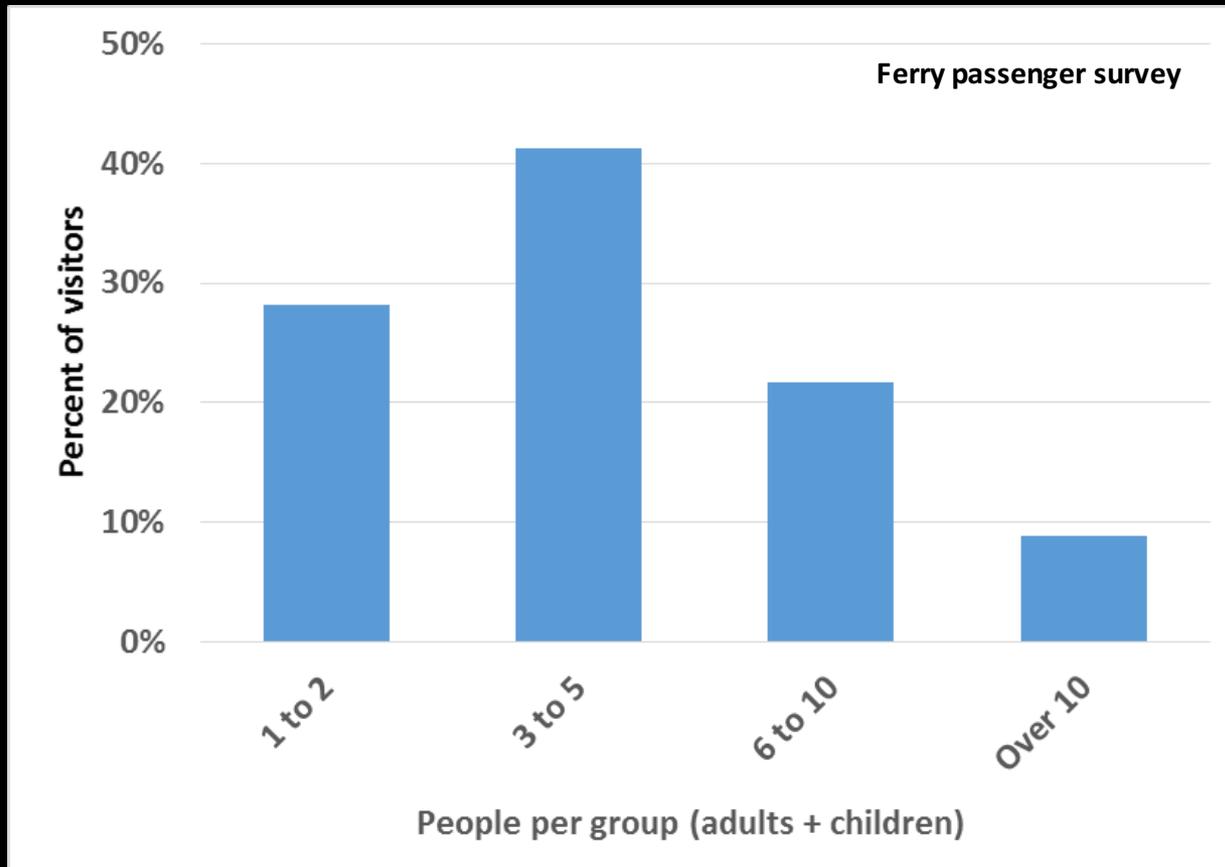


Orcas visitor length of stay



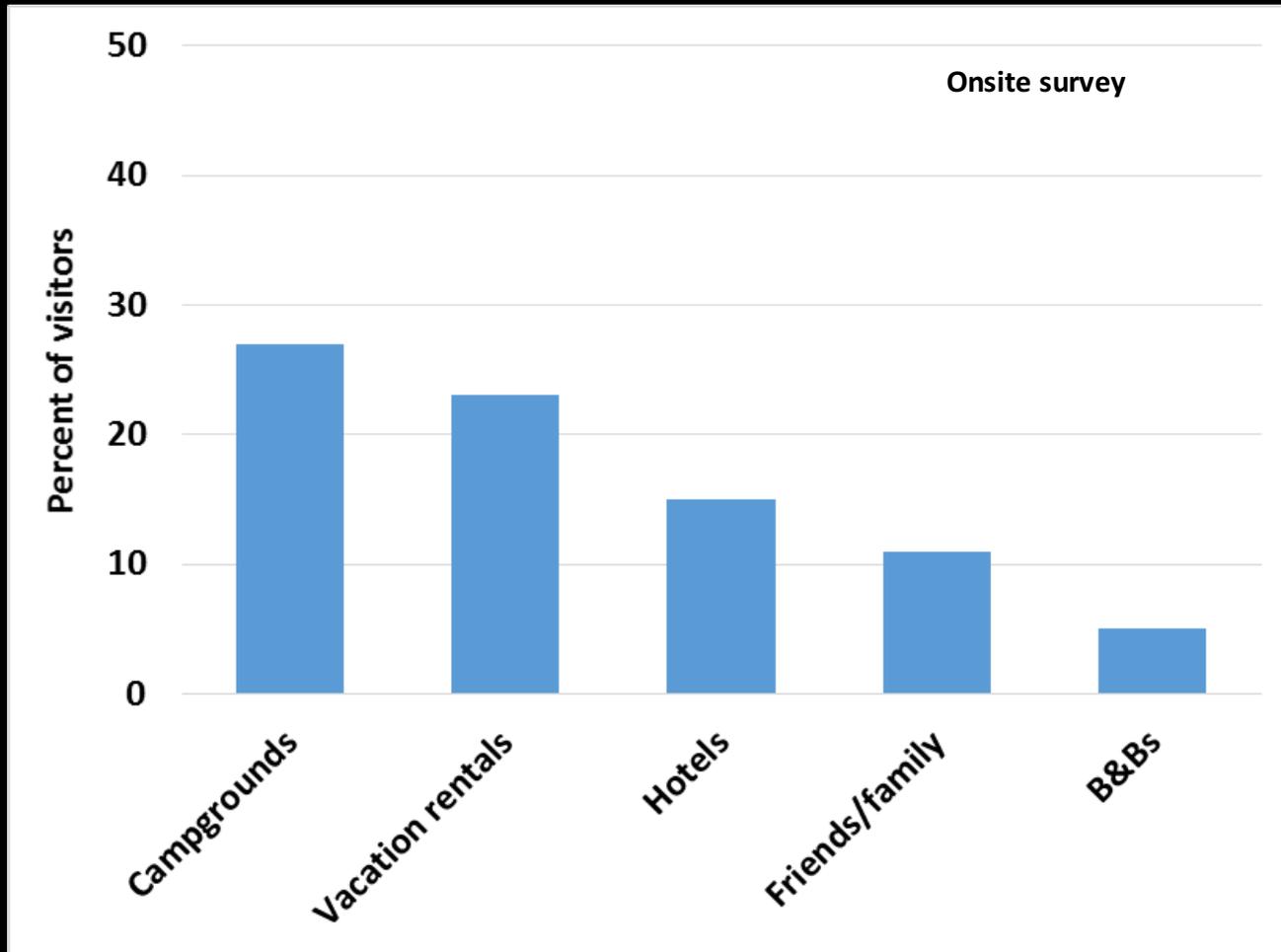
Even less day use than Lopez
Median 4.0 days
Most stay longer than a weekend

Orcas visitor group size



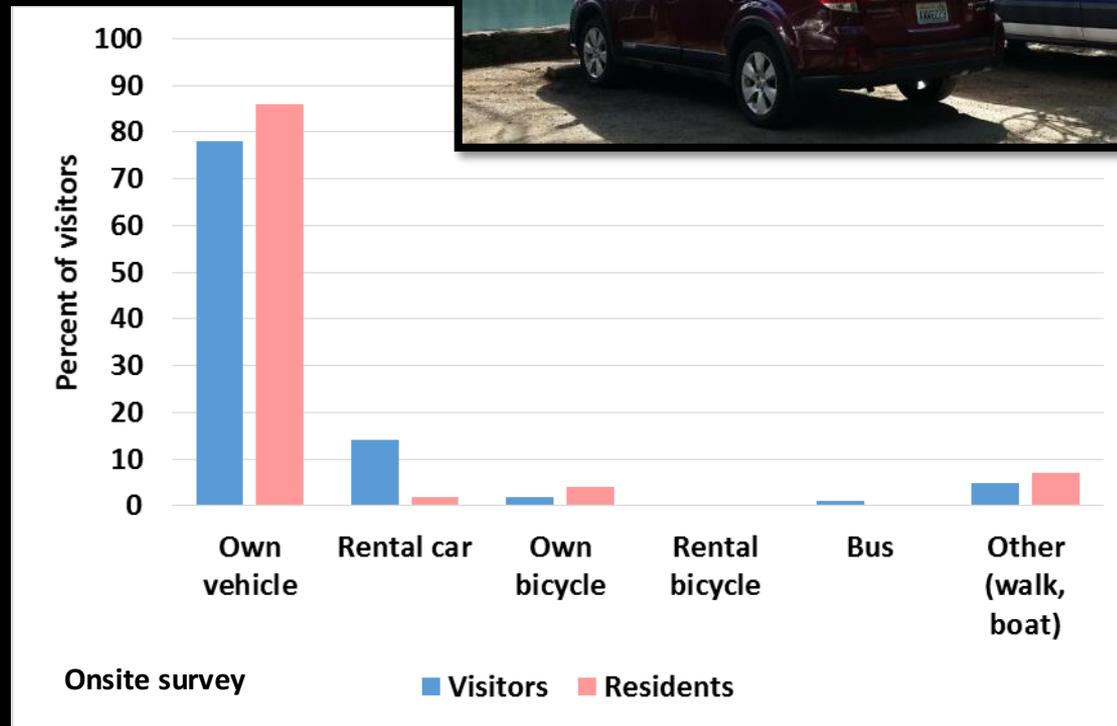
Mostly small groups
Average: 4.8 (similar to Lopez)

Orcas onsite visitors' accommodation

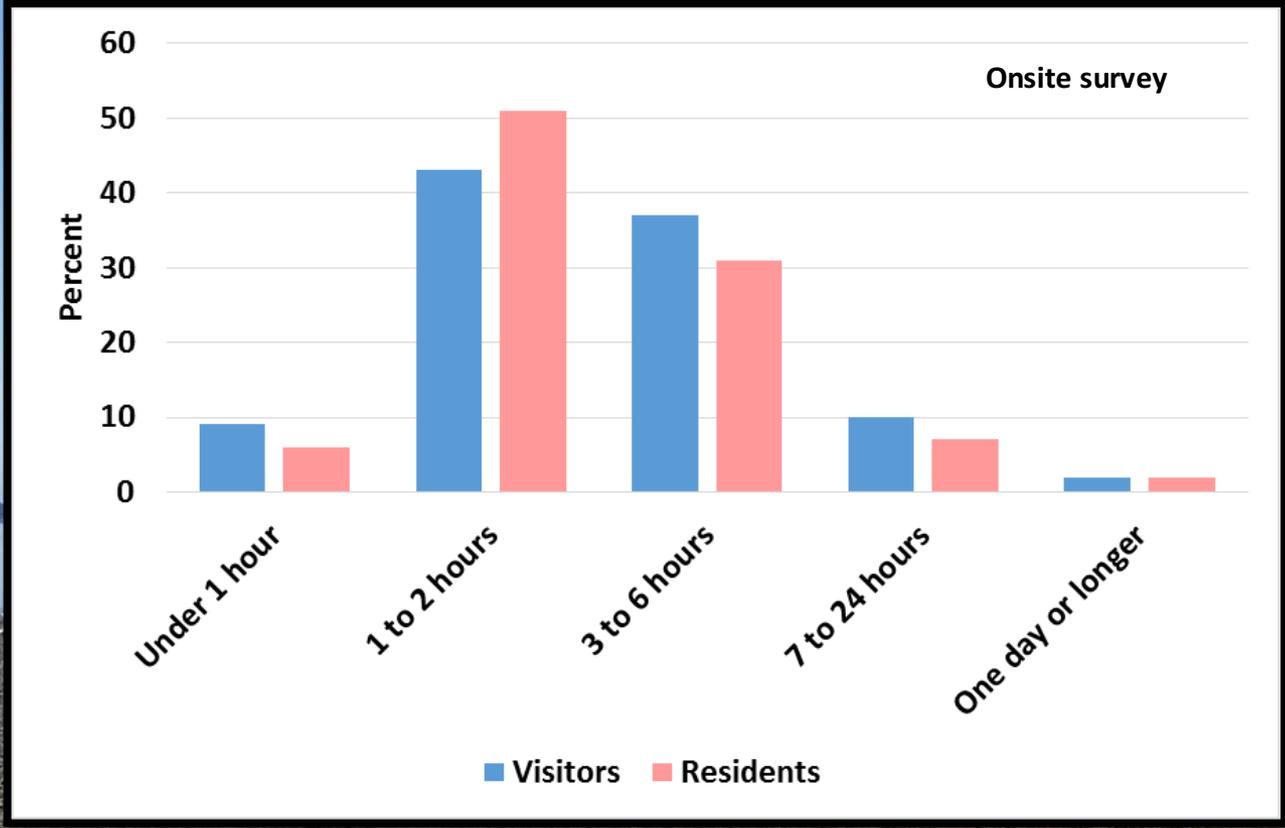
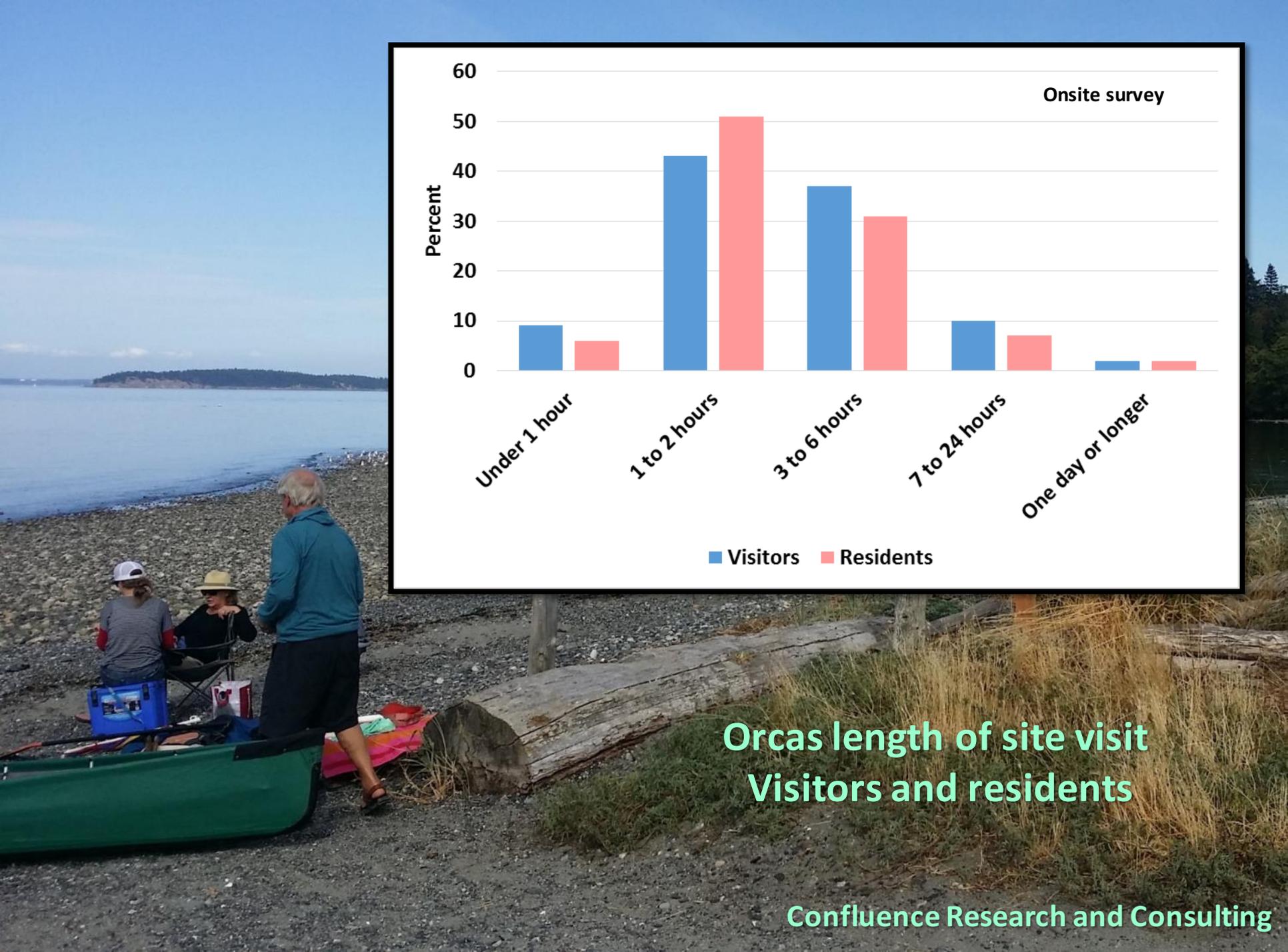


Many Orcas visitors stay in Moran SP campgrounds
More stay in hotels than on Lopez; a similar percent stay in rentals
Friends/family = "free vacation rentals?"

Travel to sites – Orcas visitors and residents

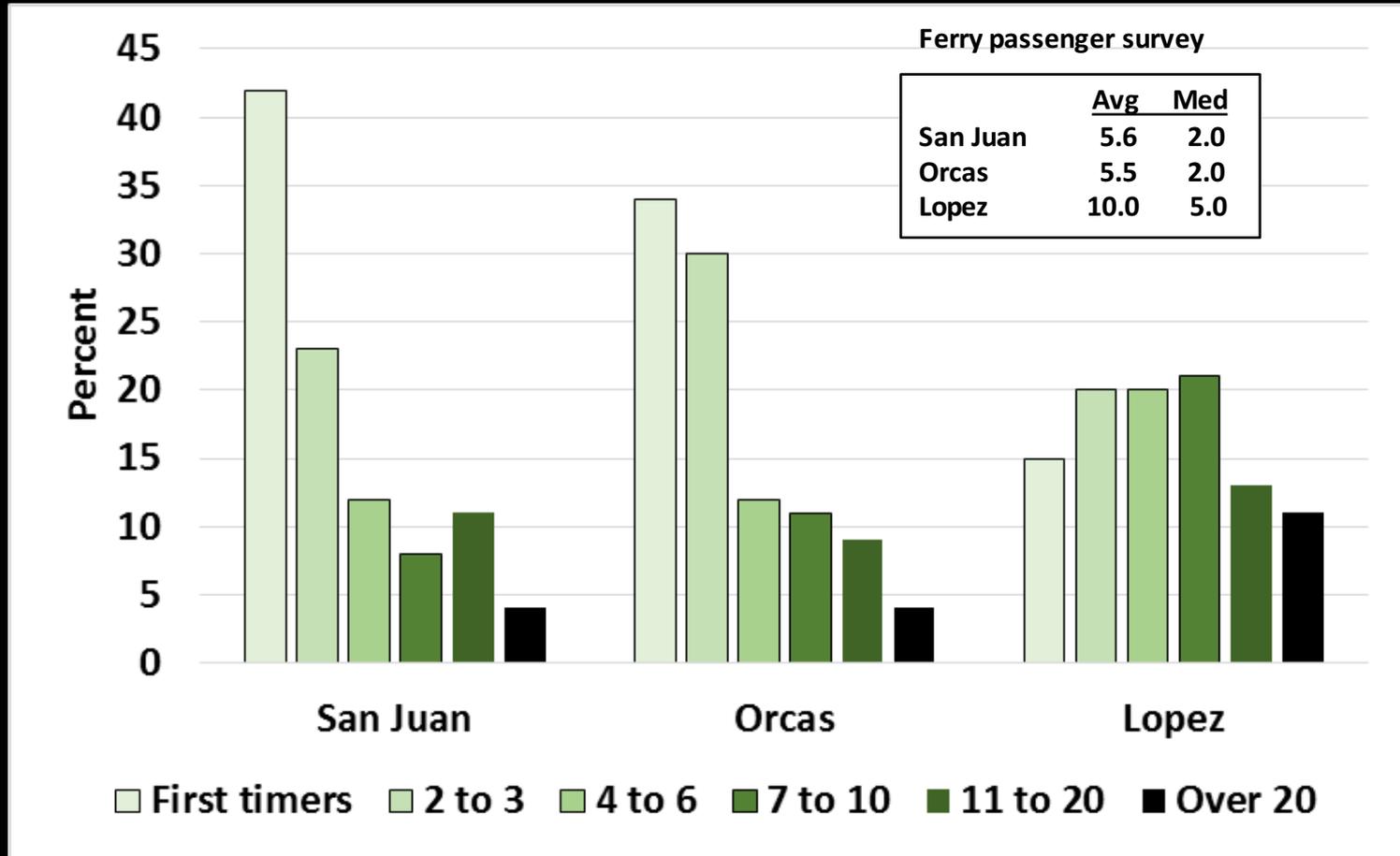


Most drive vehicles – their own or rentals
Residents slightly likely to bike more – but less than on Lopez



Orcas length of site visit
Visitors and residents

Past visits to the San Juan Islands (ferry survey)



Over one-third are first-timers for Orcas and San Juan

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

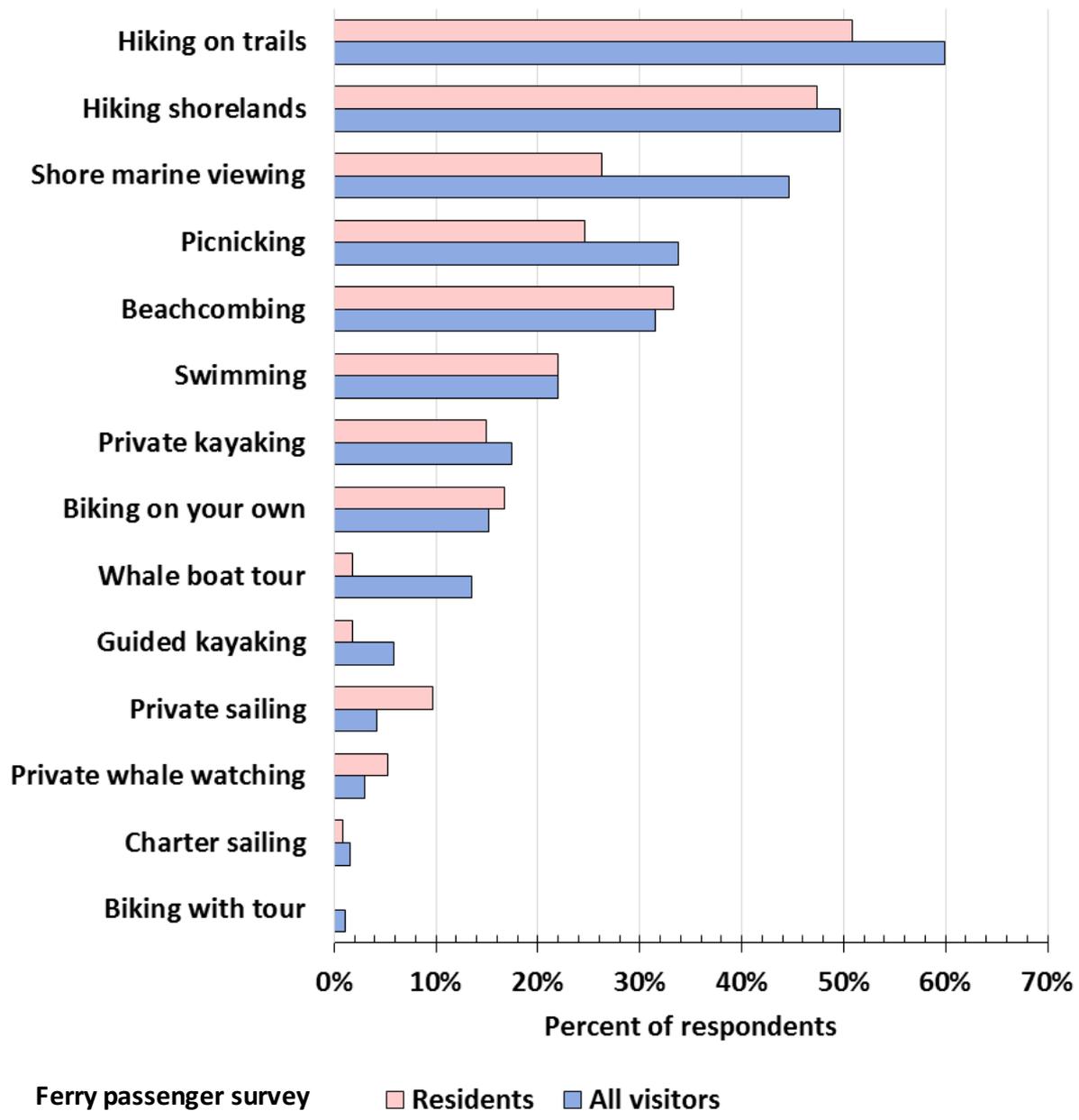
Etc.

14 activities listed on survey

Percent of visitors and residents who checked each shown on graph

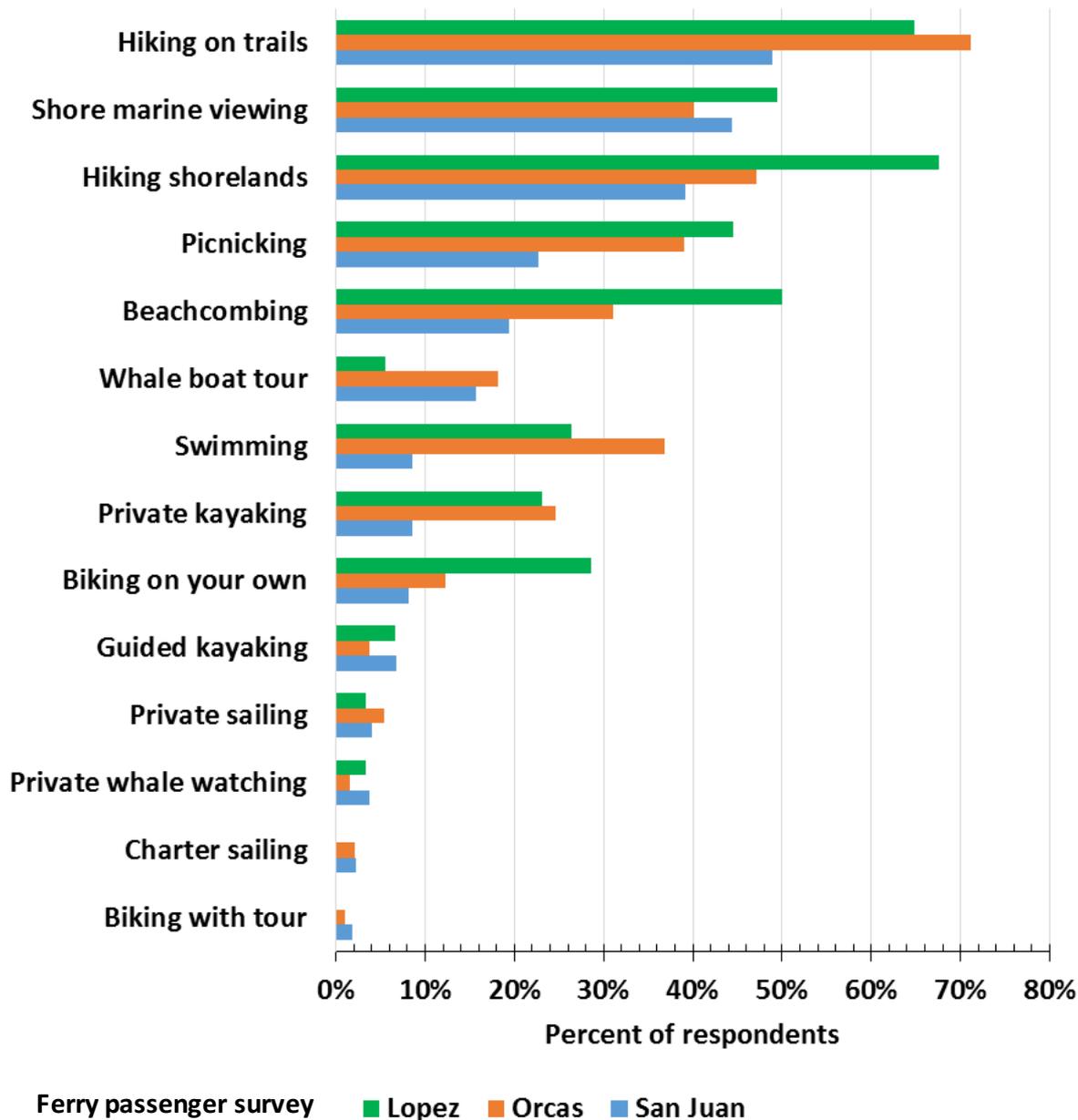
Reported recreation activities

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

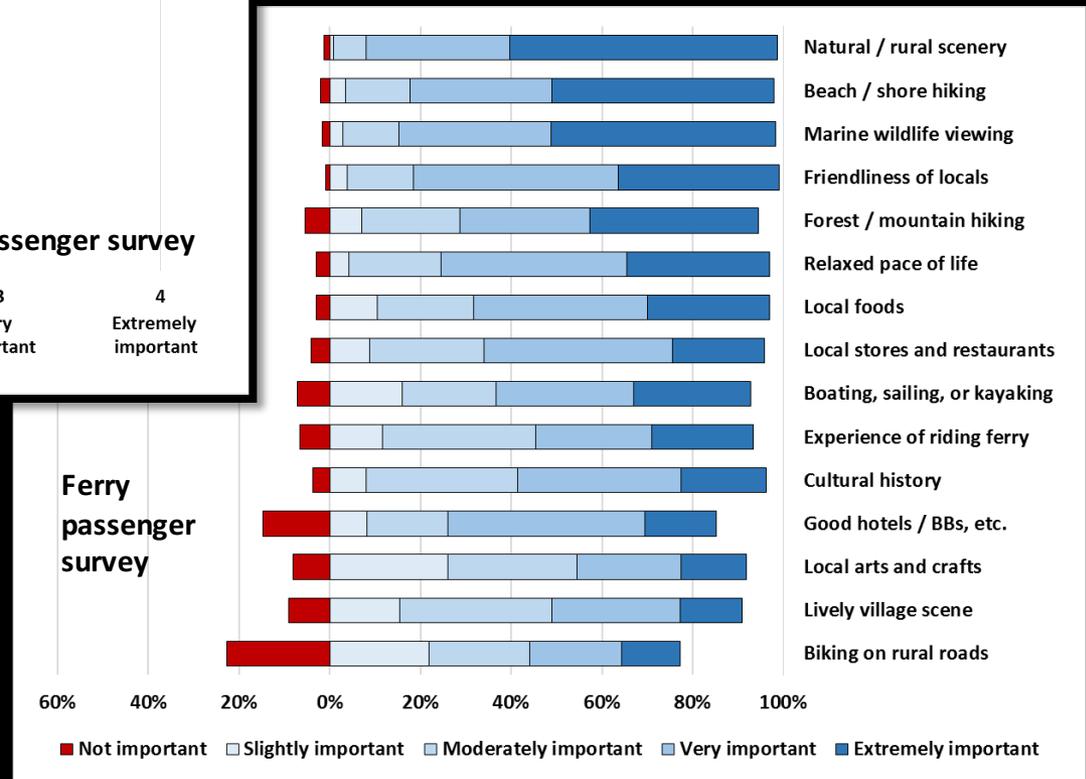
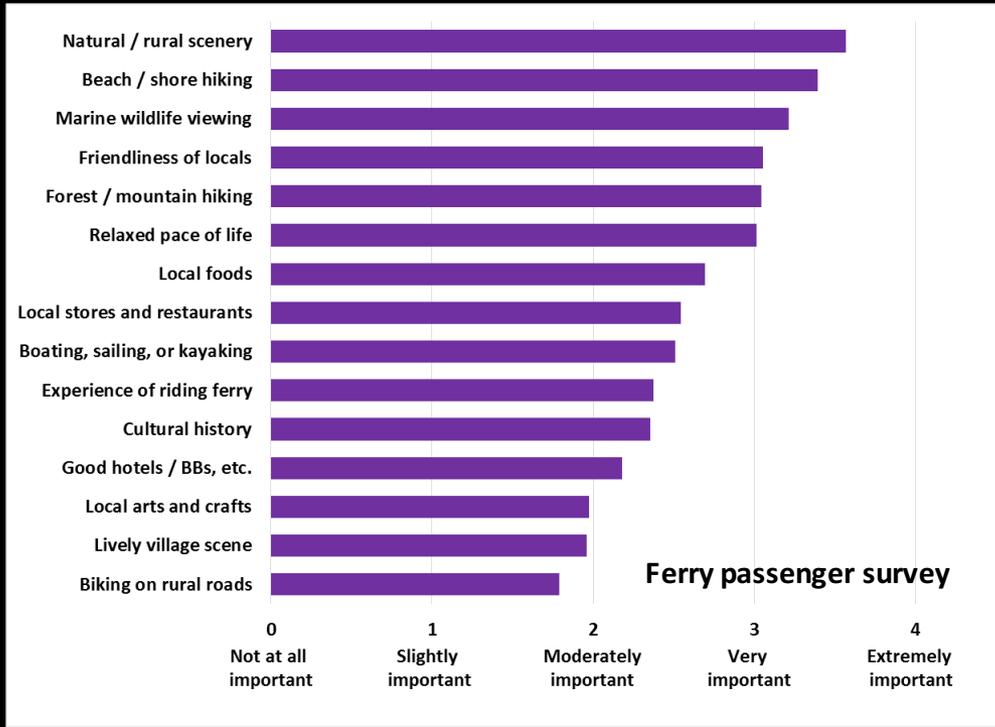
“People enjoy the San Juan Islands for many reasons. Please rate the following reasons for you.”

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

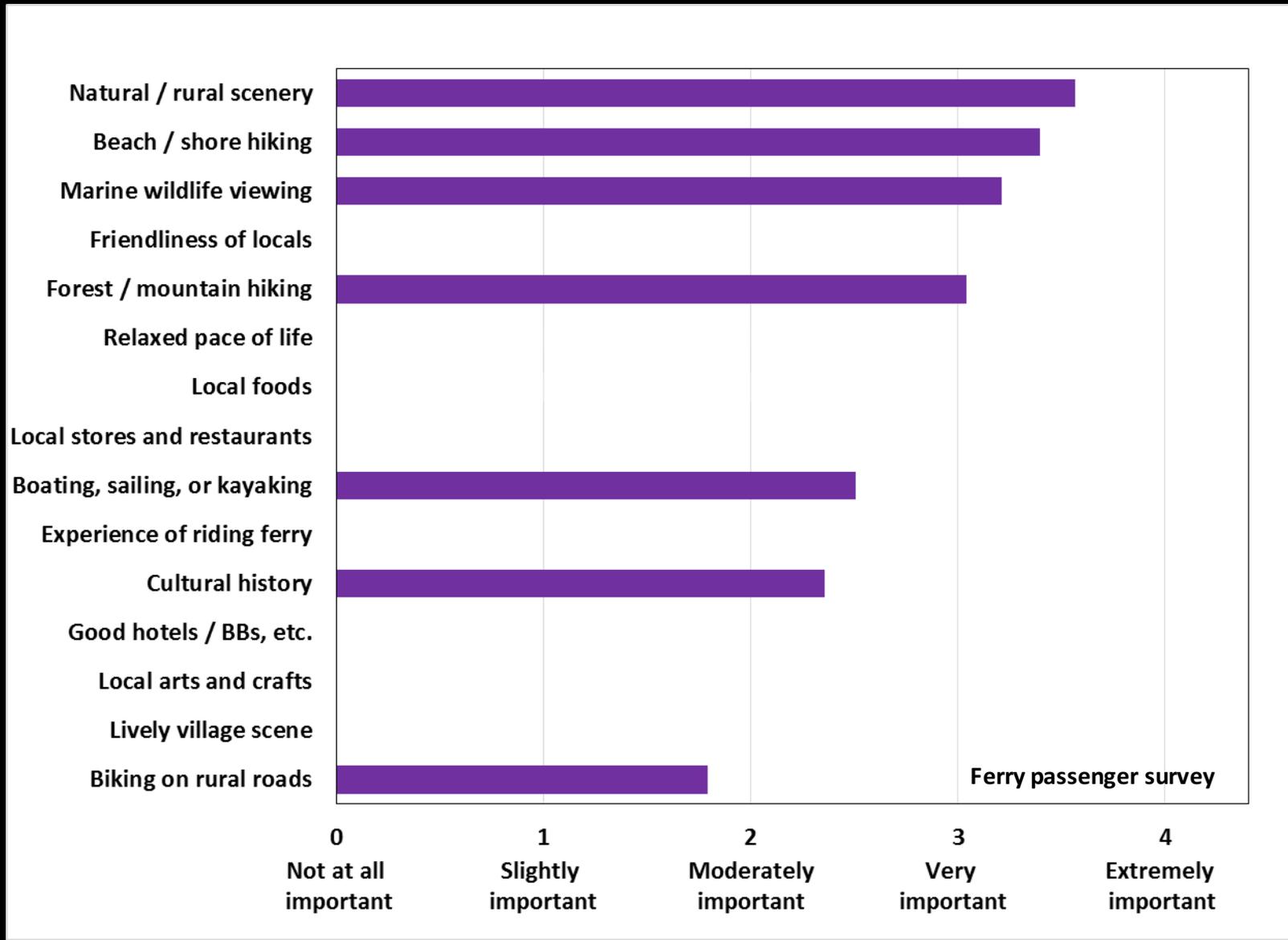
15 items on the survey

Average importance of 12 key items on following graph

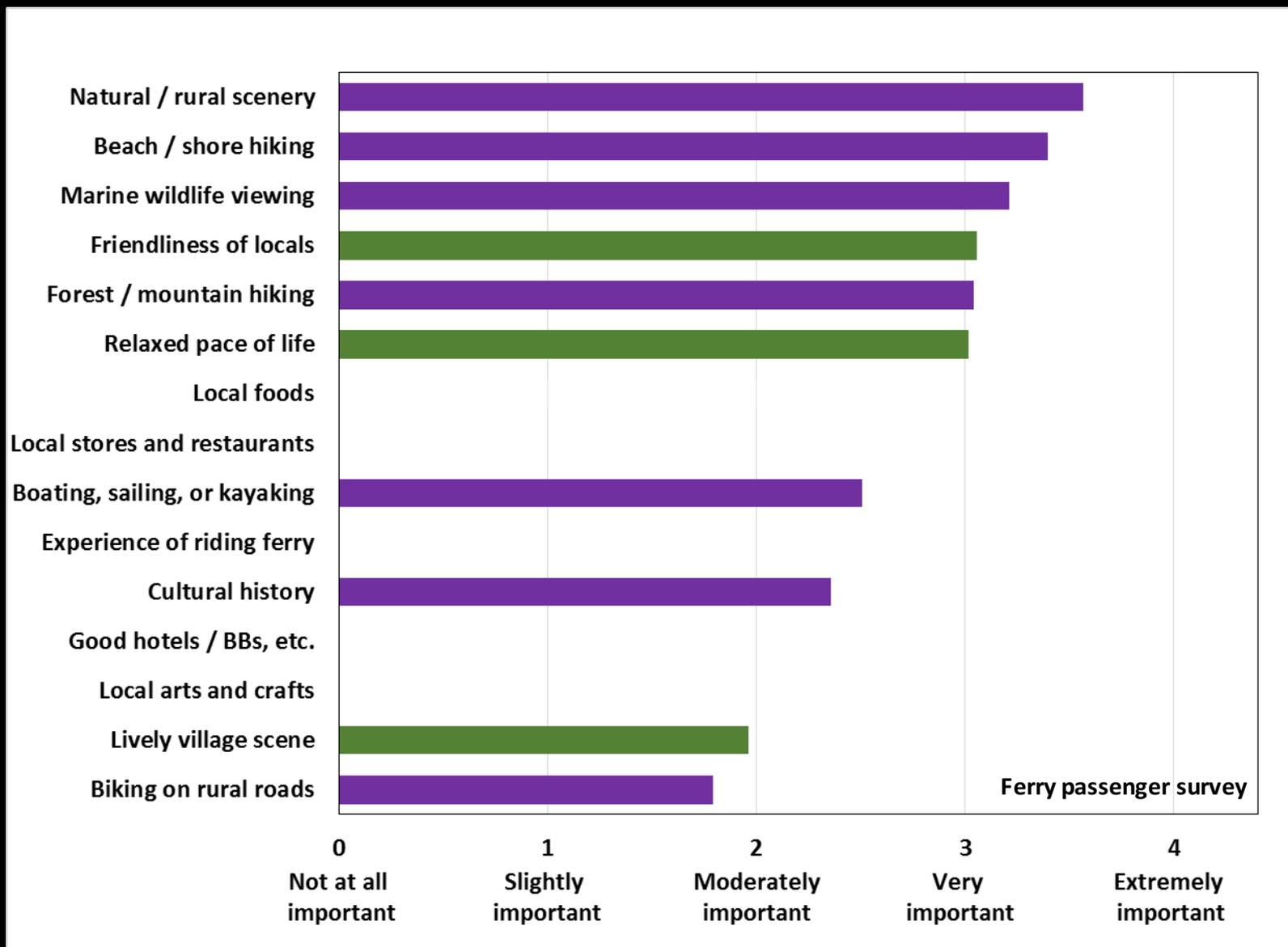
Experience importance: two ways to analyze



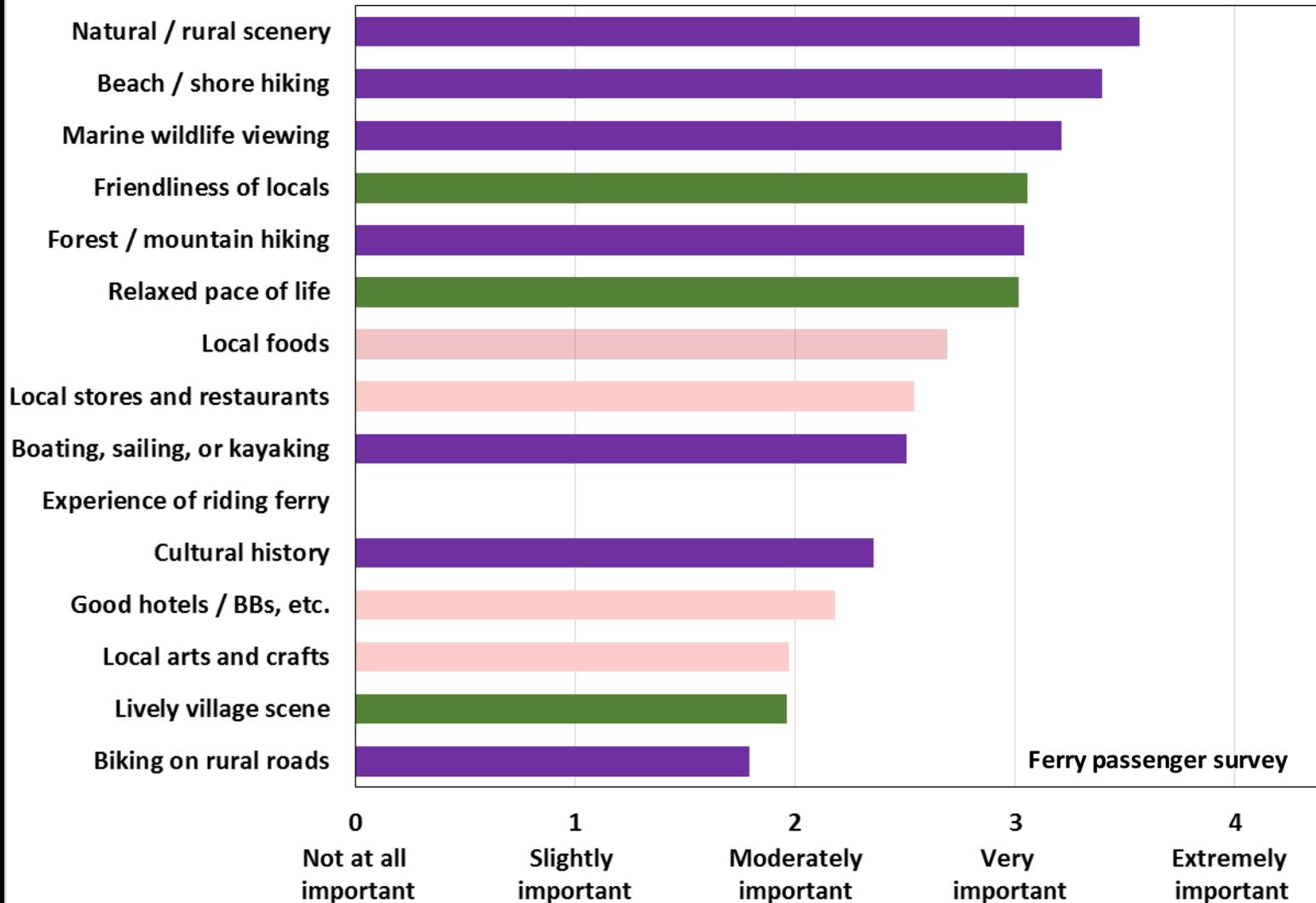
4 of 5 most important experiences rely on natural resources



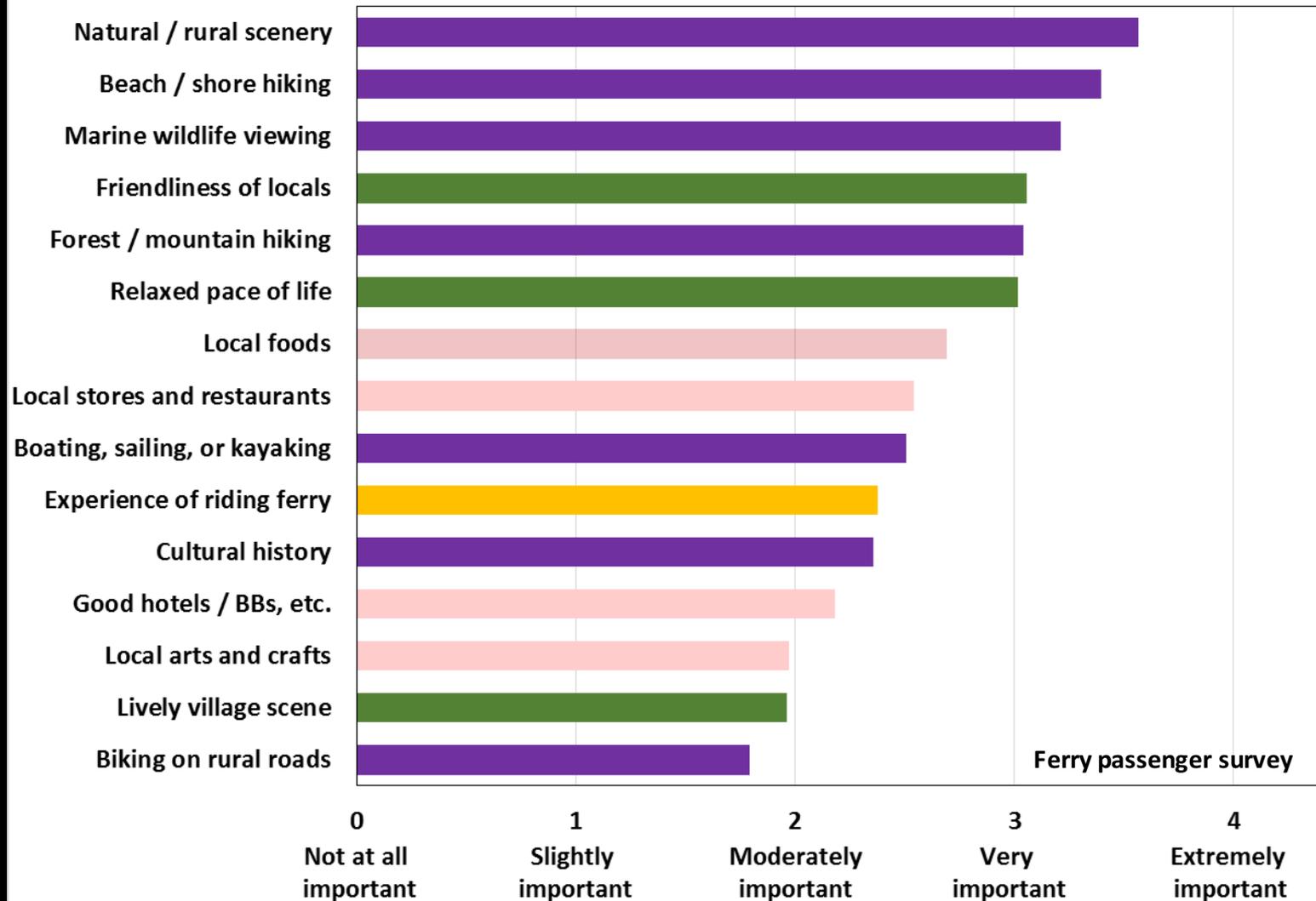
Social setting: Friendliness & relaxed pace > lively village scene



Tourism development is relatively less important



Ferry experience is moderately important



A scenic view of a large body of water, likely a bay or fjord, with several islands and peninsulas. The water is a deep blue-grey color. In the foreground, there are several pine trees with green needles and some bare branches. The sky is overcast with light grey clouds. The overall scene is a natural landscape view.

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Where do they stay?

Types of Accommodation



**Vacation Rental
Inventory**

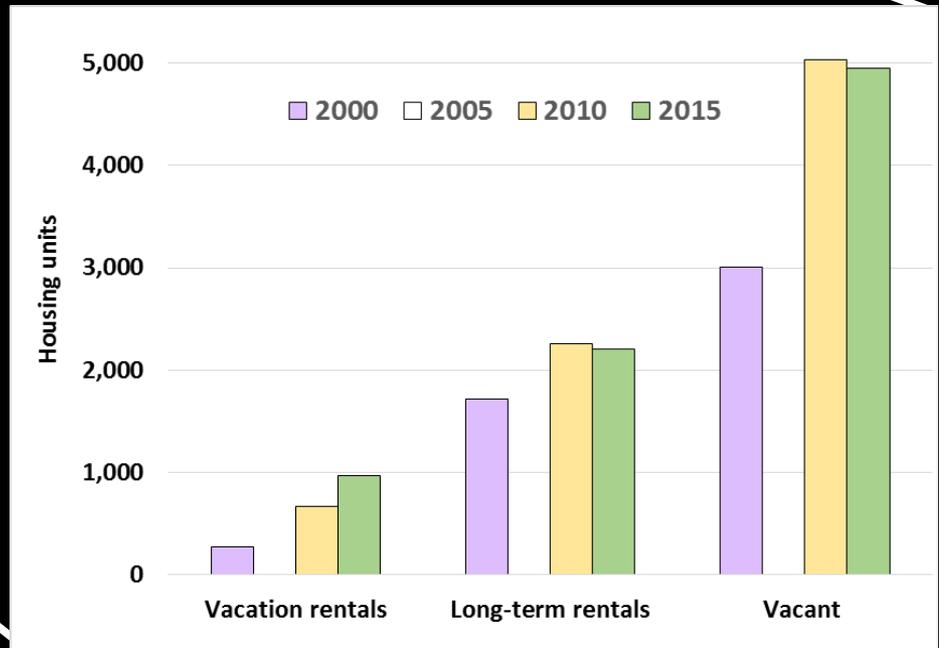
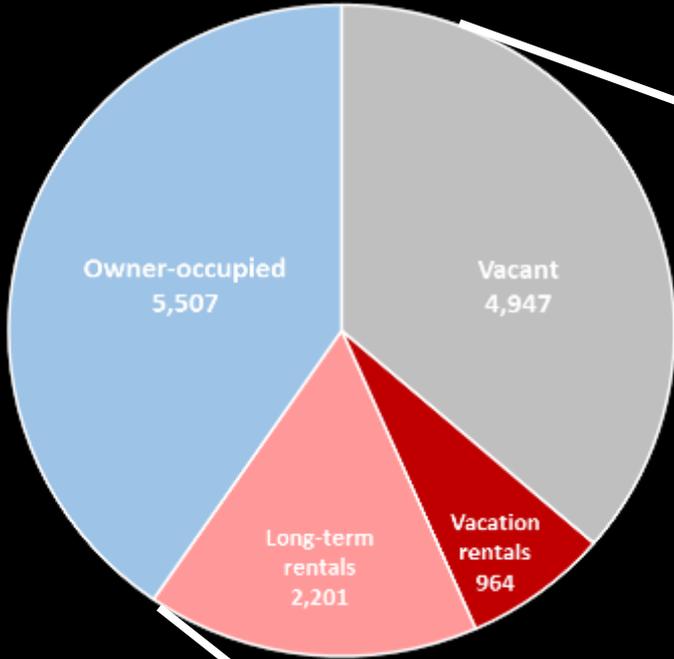
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**Hotel
Inventory**

13,619 total housing units

Housing statistics 2010



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

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 the Airbnb search interface for "San Juan Islands - Homes". The search bar at the top contains the text "San Juan Islands - Homes". To the right of the search bar are links for "Become a host", "Help", "Sign Up", and "Log In". Below the search bar, there are filter buttons for "Jan 17 - Jan 21", "1 guest", "Home type", "Price", "Instant Book", "Trip type", and "More filters".

The main content area displays a grid of property listings. Each listing includes a thumbnail image, a title, a description, and pricing information. The listings are as follows:

- 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

On the right side of the page, there is a map of the San Juan Islands. The map shows various islands and their corresponding rental prices. The prices are: \$581, \$112, \$165, \$256, \$102, \$426, \$220, \$94, \$229, \$288, \$161, \$173, \$176, \$203, and \$175. The map also includes a search bar, a "Search as I move the map" checkbox, and a "Language and currency" dropdown menu.





Hotel Inventory



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

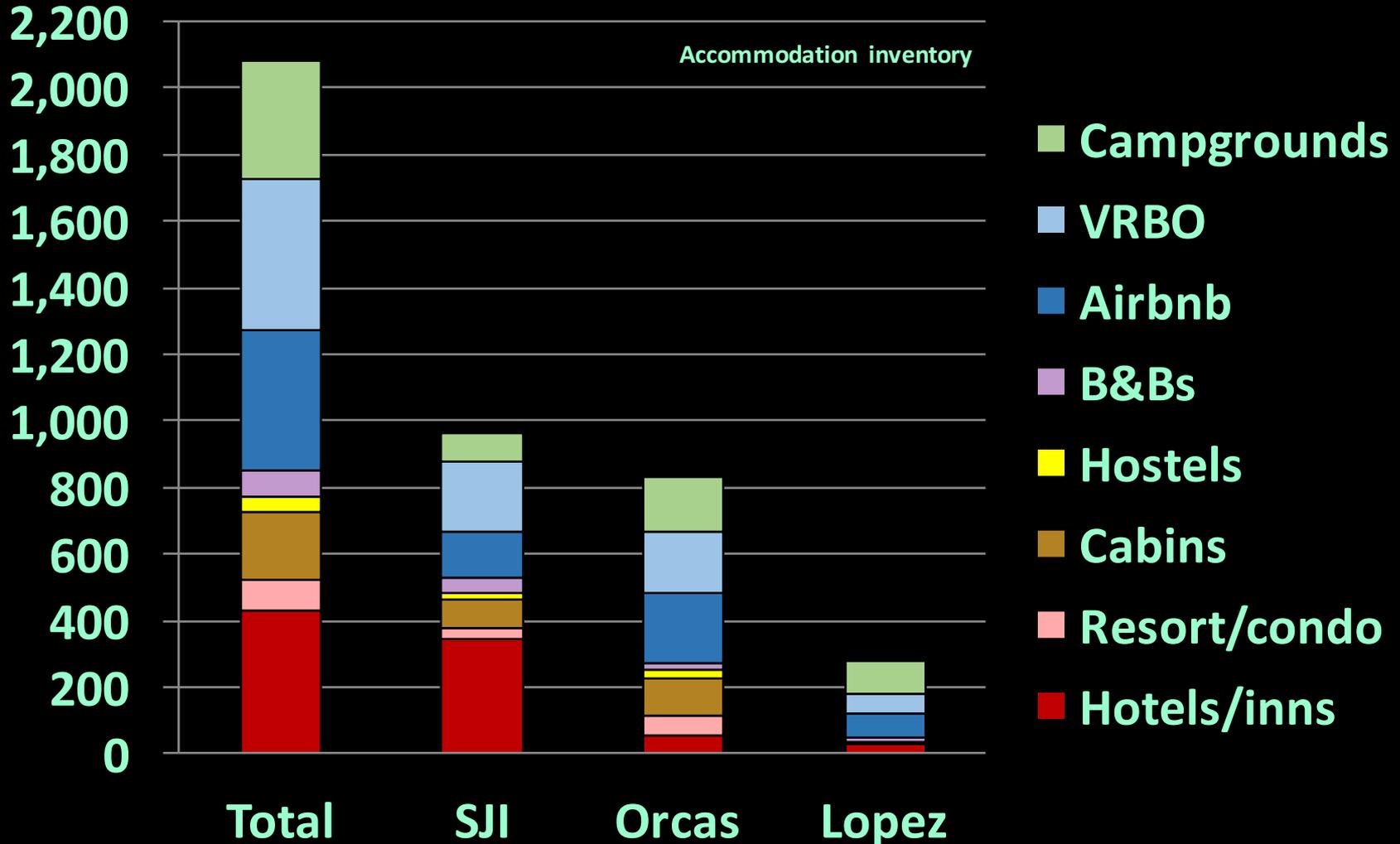


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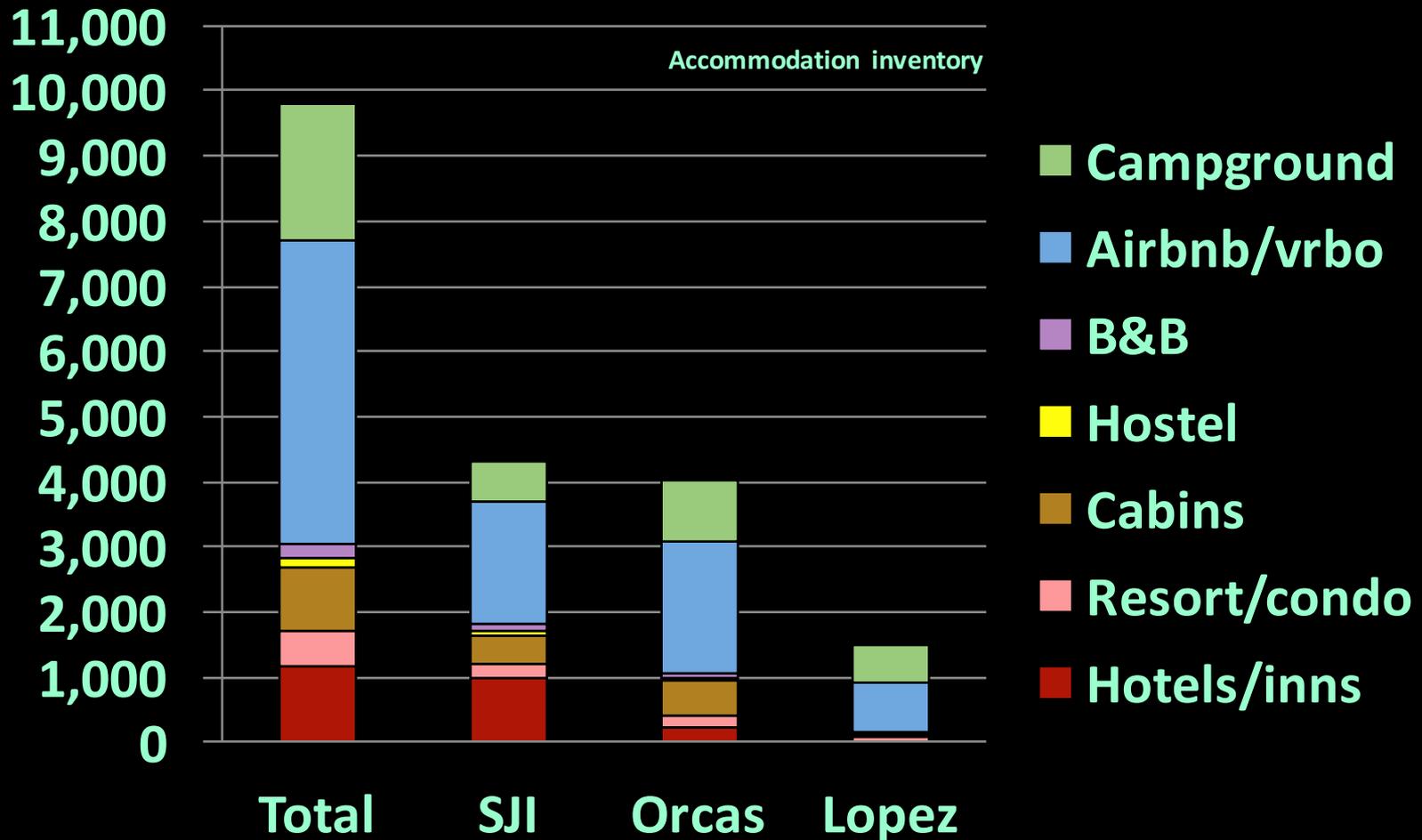
~ 50% of units
have kitchens

Number of accommodation units

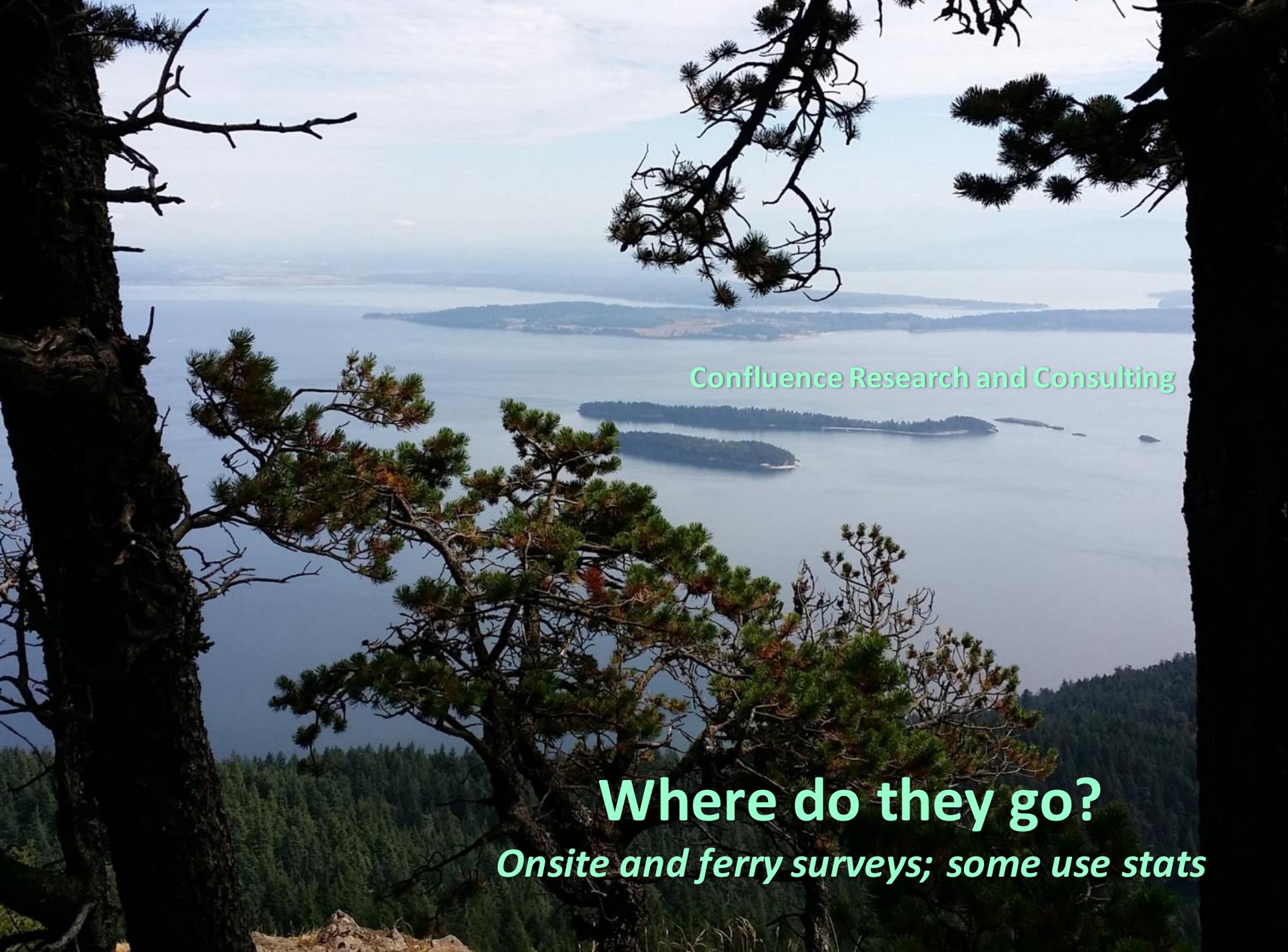
Rooms / bedrooms / campsites



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



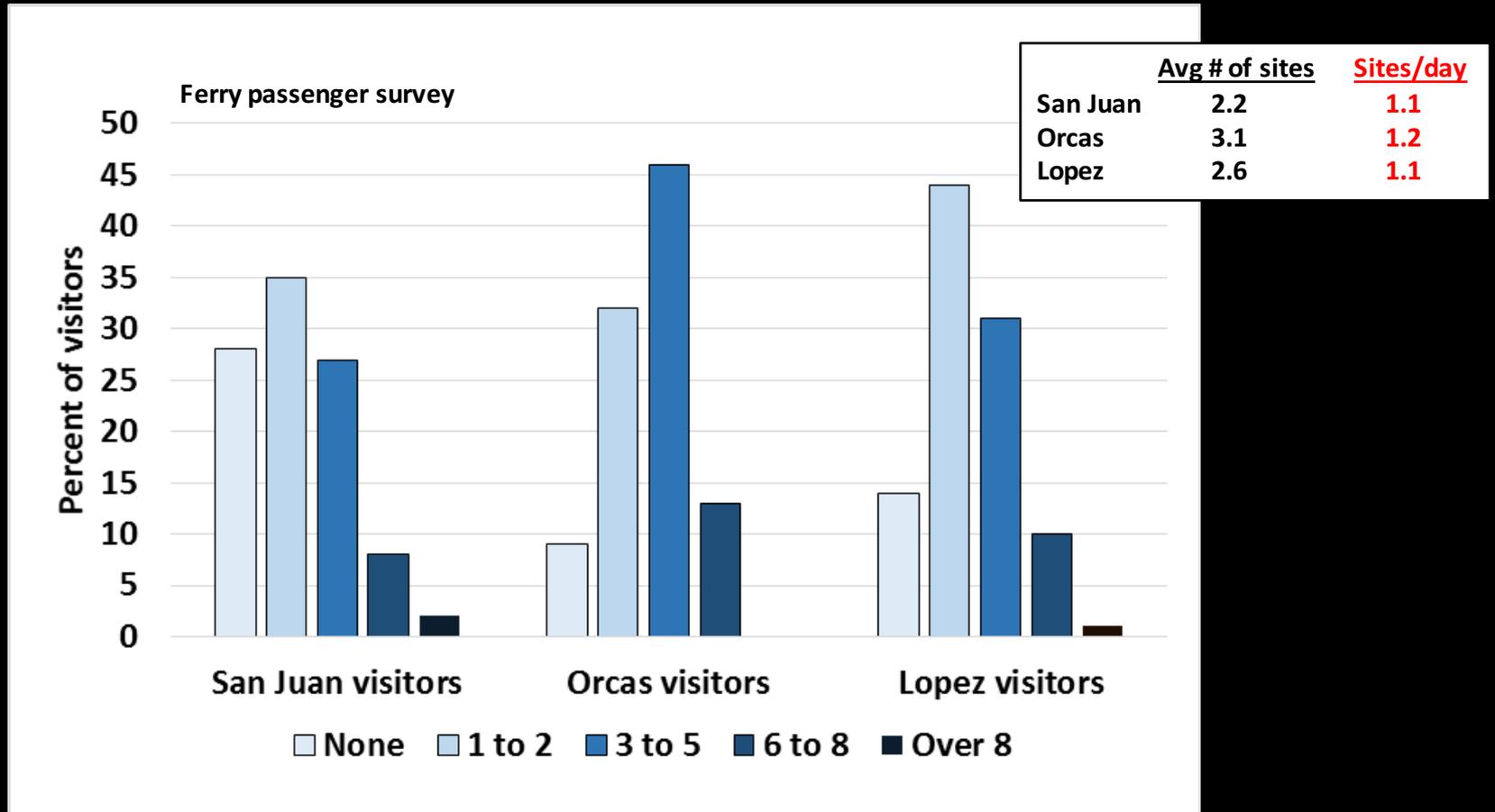
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Where do they go?

Onsite and ferry surveys; some use stats

Number of recreation sites visited (total and per day)

For the island where they were surveyed



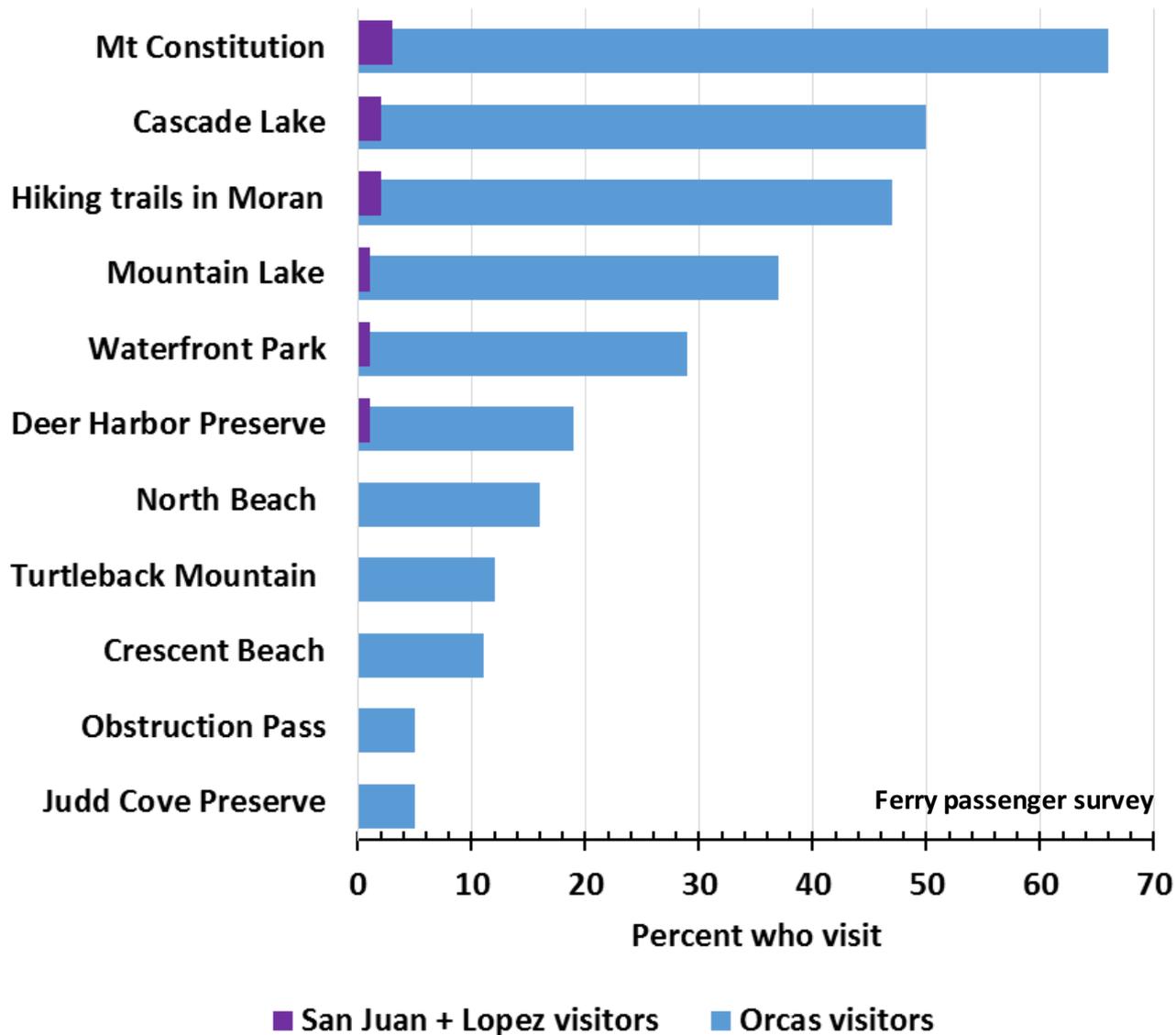
Majorities visit multiple sites

Orcas > Lopez > San Juan

More San Juan visitors don't visit any sites

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

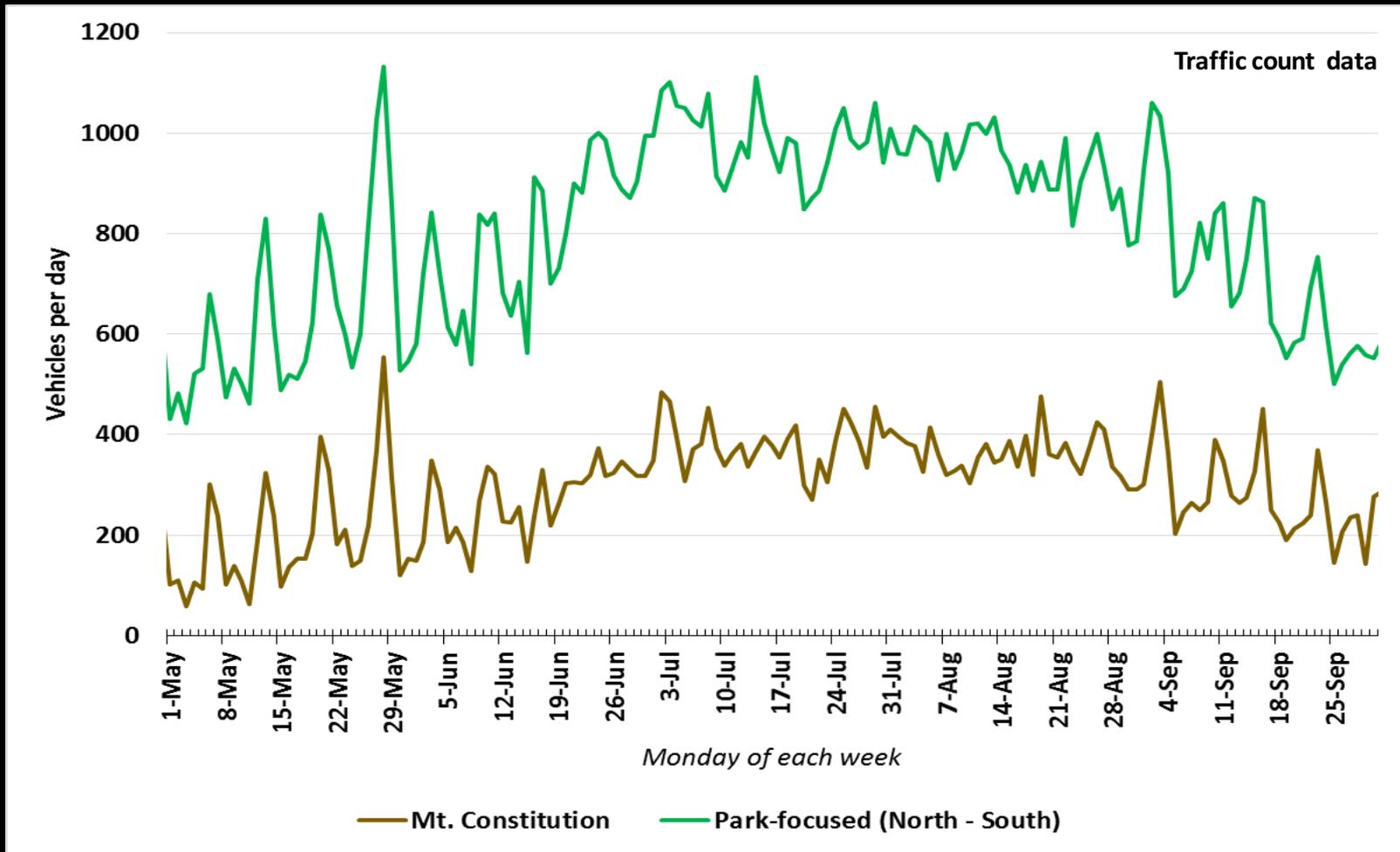
Most visited outdoor recreation sites on Orcas Island



Others listed:

- Eastsound
- Buck Bay
- Skate park
- Rosario
- Kayaking
- Whale watching

Mount Moran State Park 2017 Vehicles per day through season



About 33% to 50% (depends on day) use Mt. Constitution Road
Correlation Moran & MC road = .93; if busy in park, it's busy on mountain

Obstruction Pass State Park



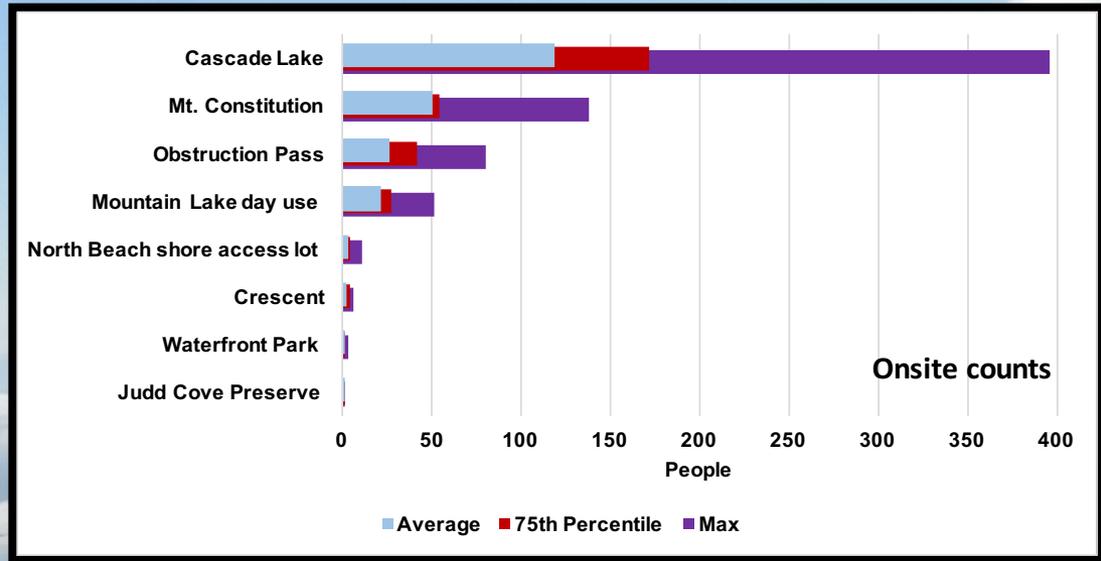
OP traffic is about 8% of Moran	
May – Sep average	68 per day
Typical range	49 to 86
Max	136
Jul-Aug average	82



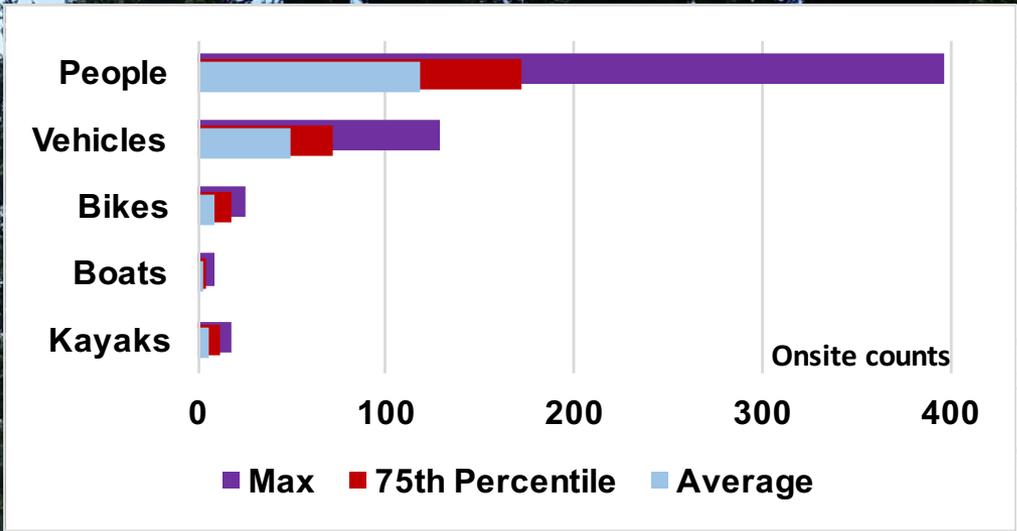
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Conditions at sites
Onsite and ferry surveys

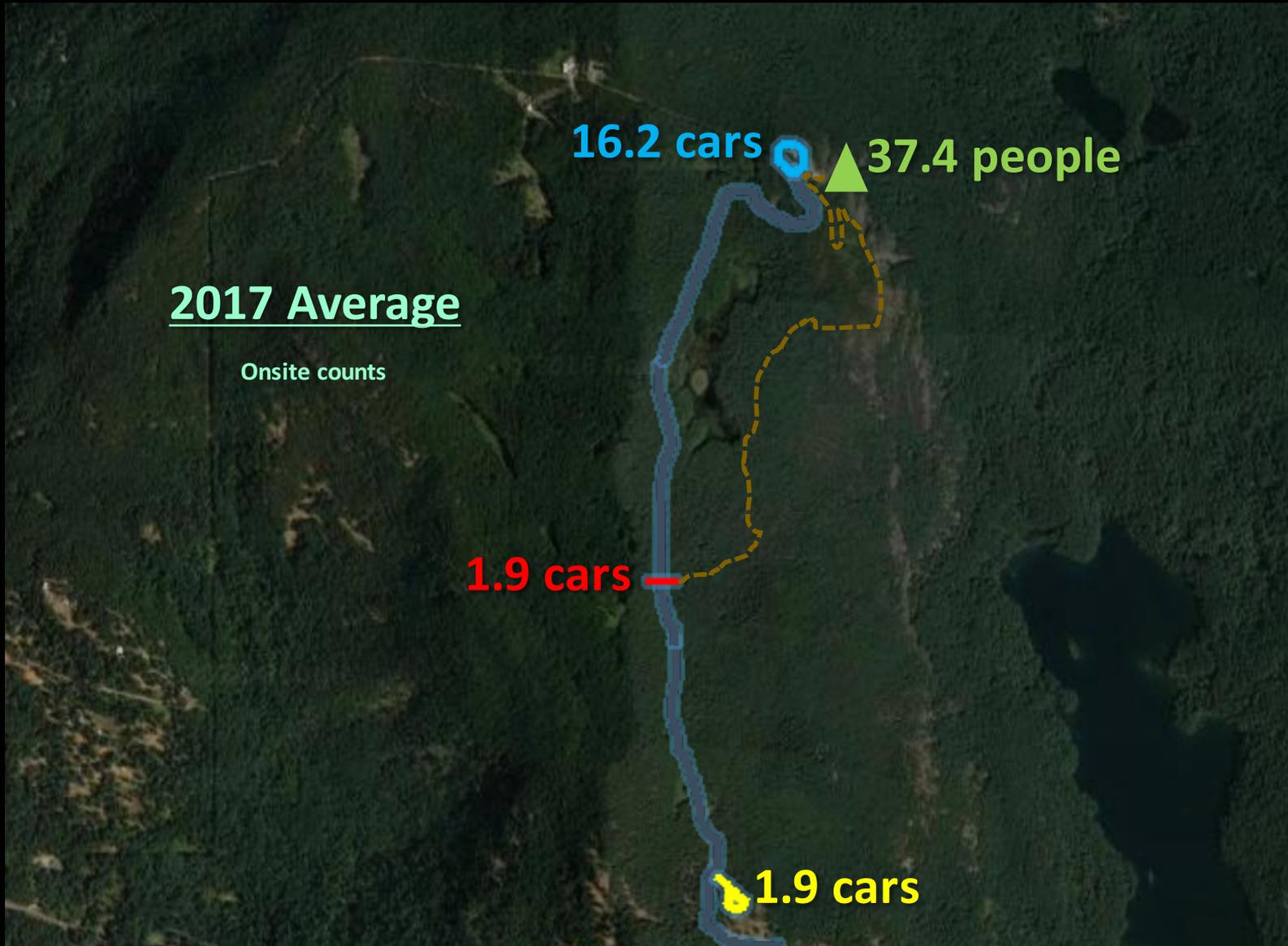
Orcas Island All Sites



Cascade Lake



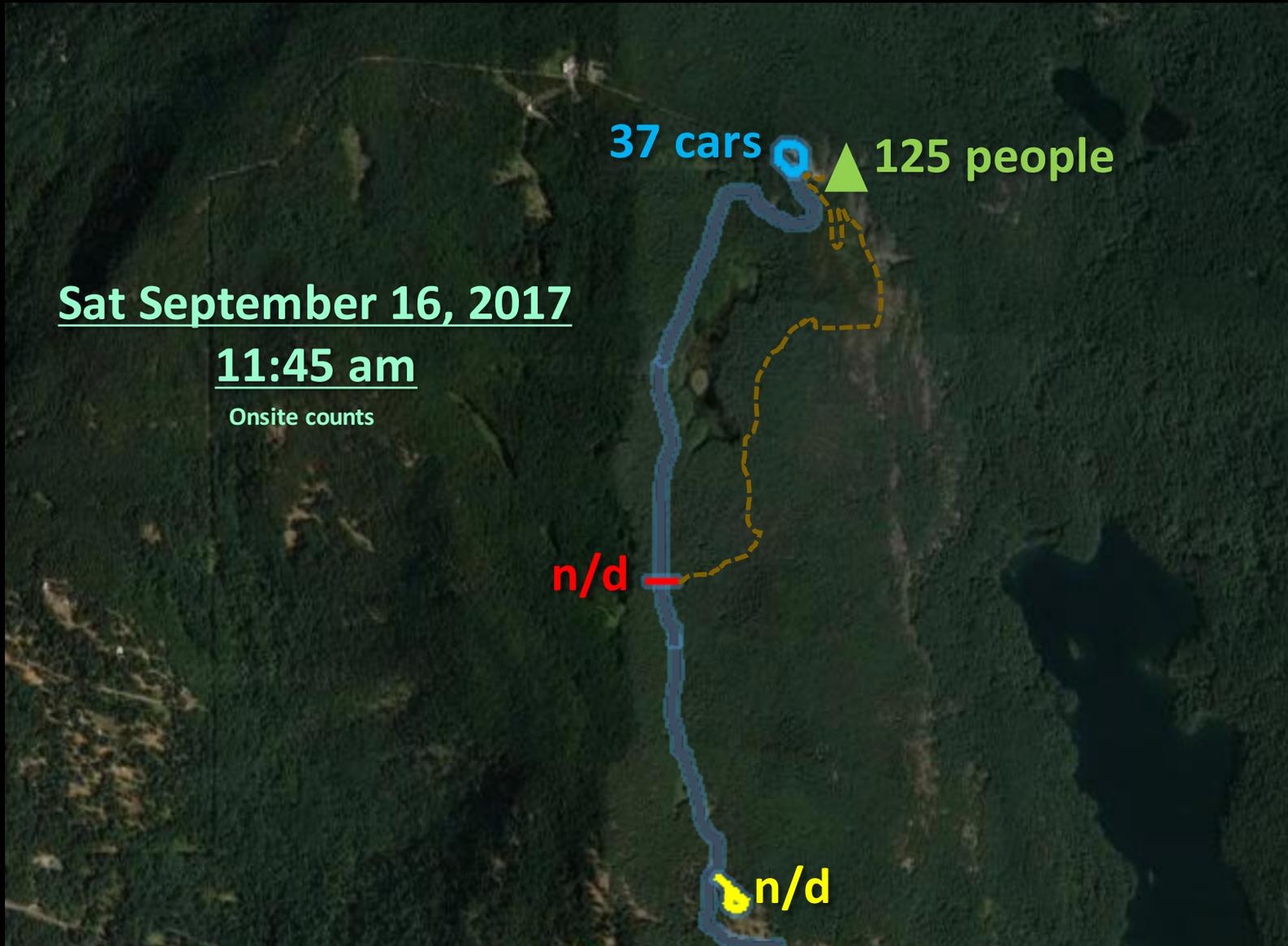
Mt. Constitution use distribution



Mt. Constitution use distribution



Mt. Constitution use distribution



Crowding

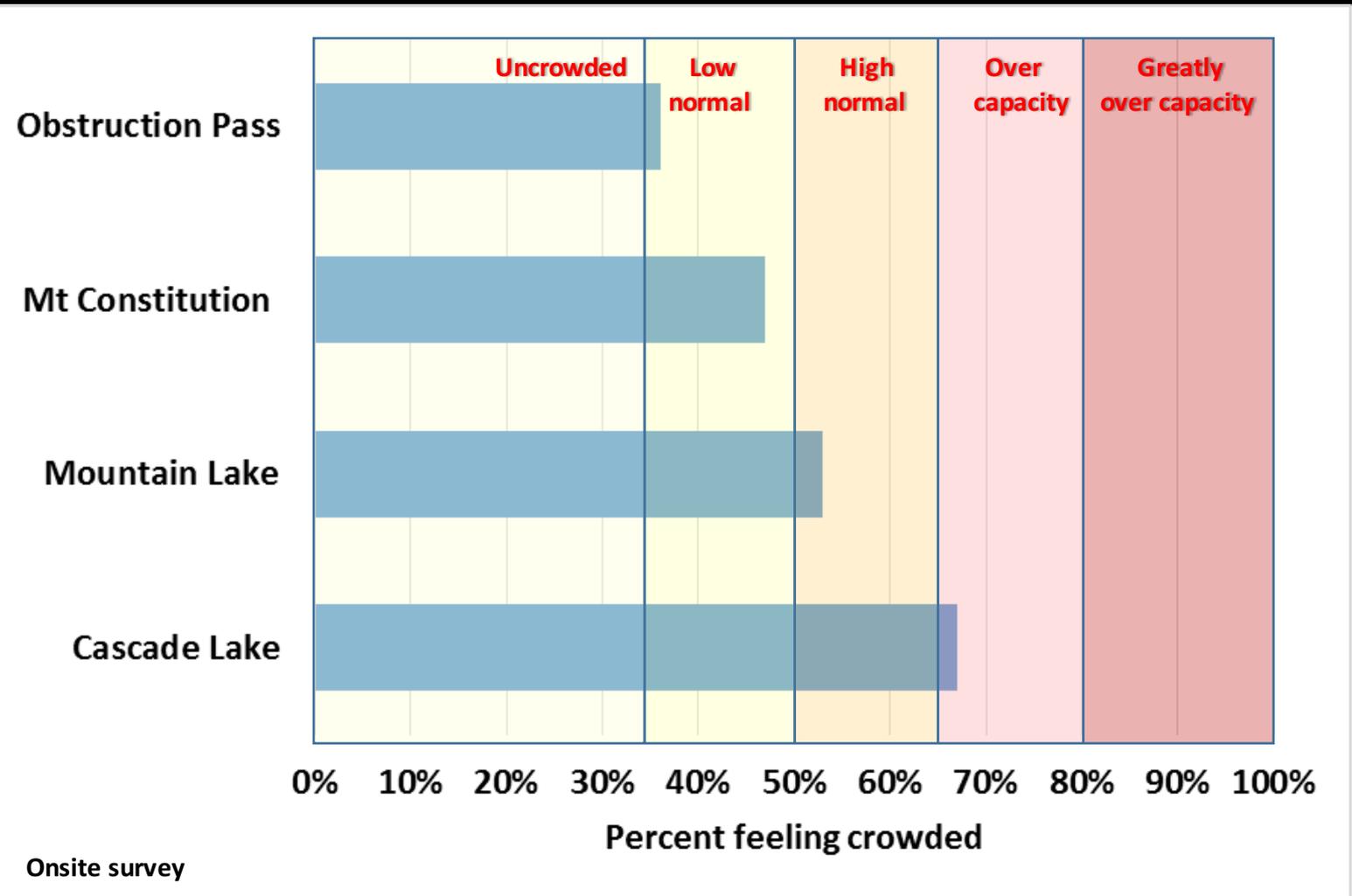
**“How crowded did you feel
in the following locations during your visit?”**

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

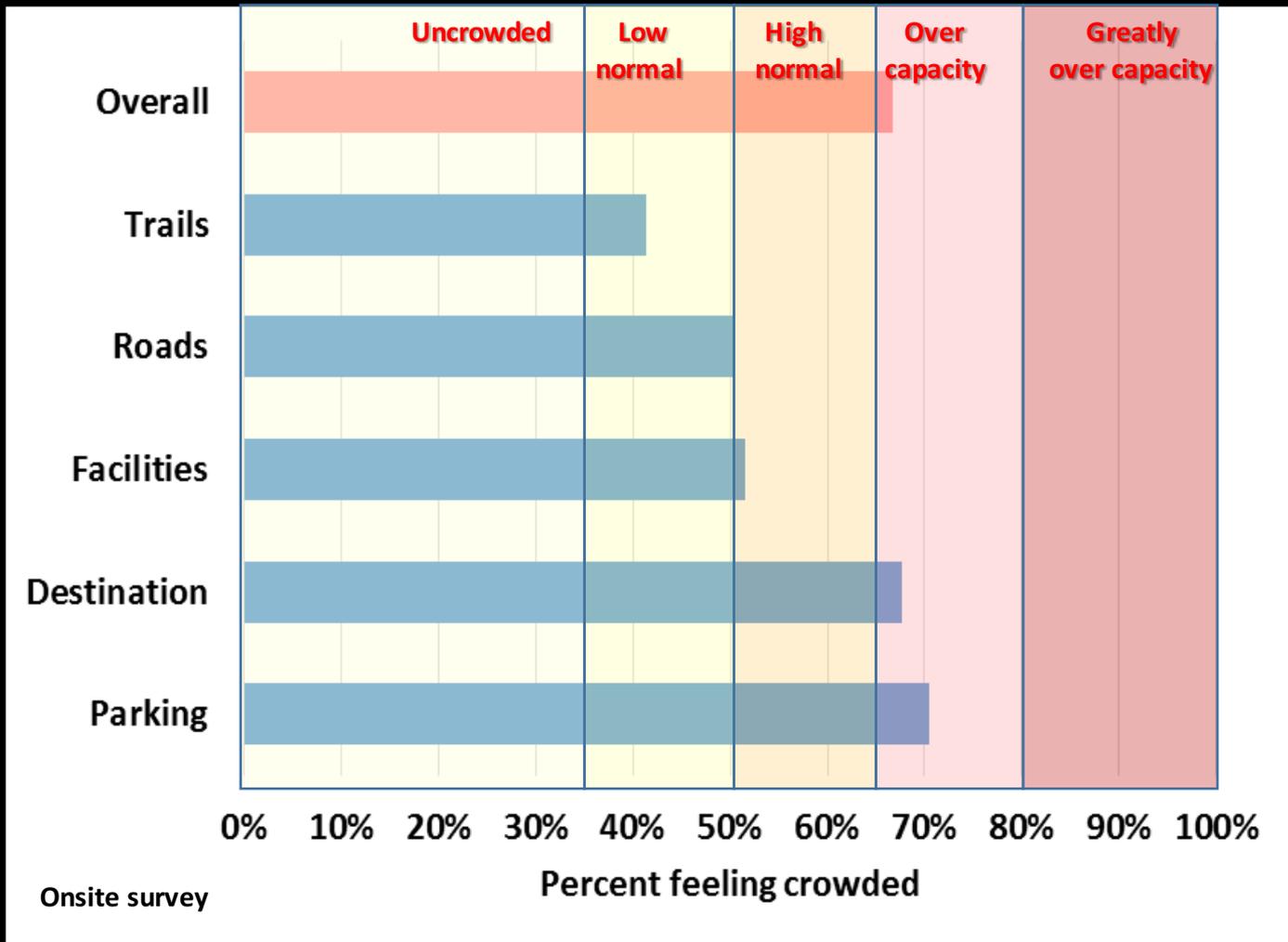
**Percent reporting 3 or higher (some degree of crowding) for
all locations shown in following graph...**

“Rule of thumb” indicator of capacity...

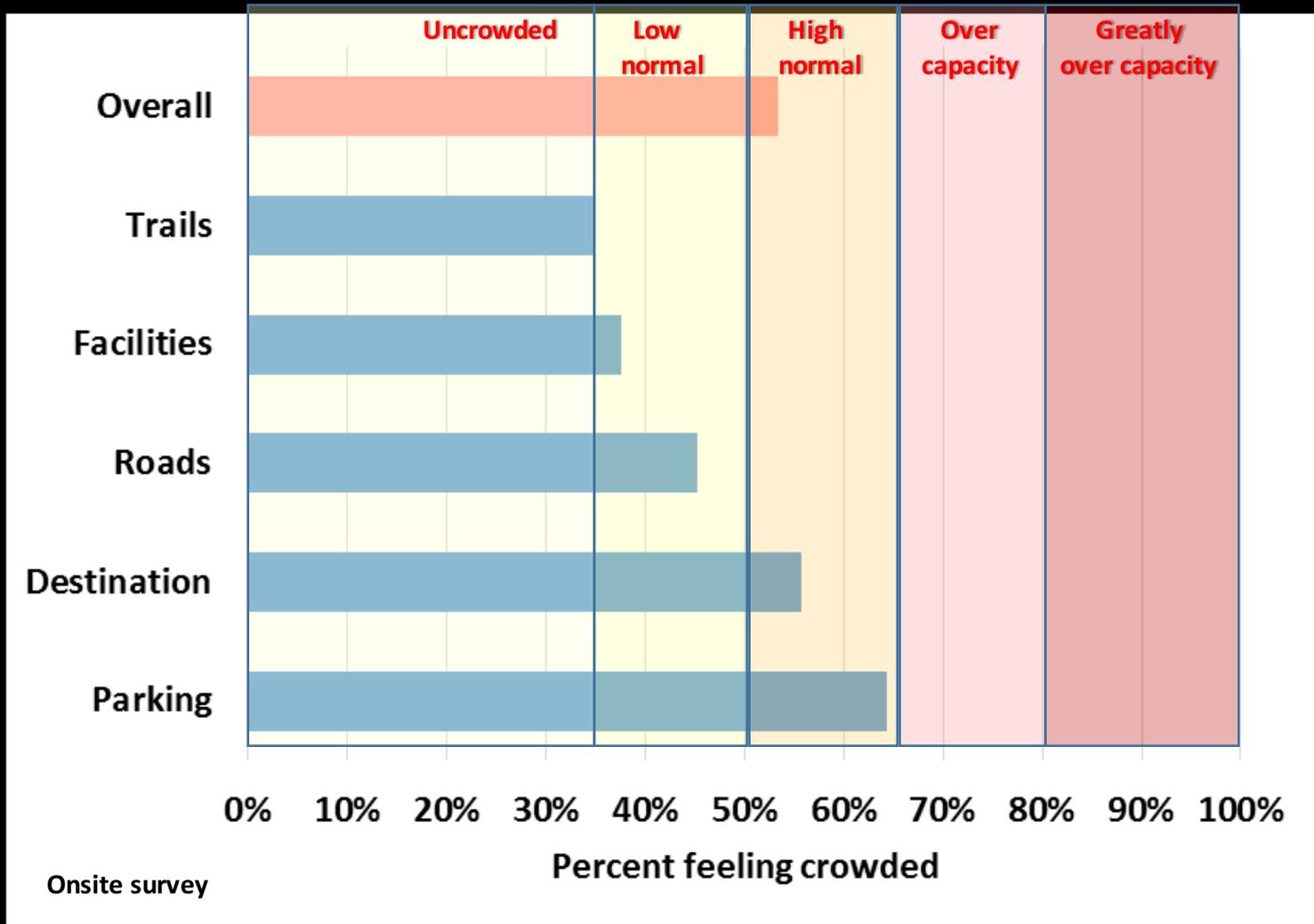
Orcas Island – Percent feeling crowded at sites (overall)



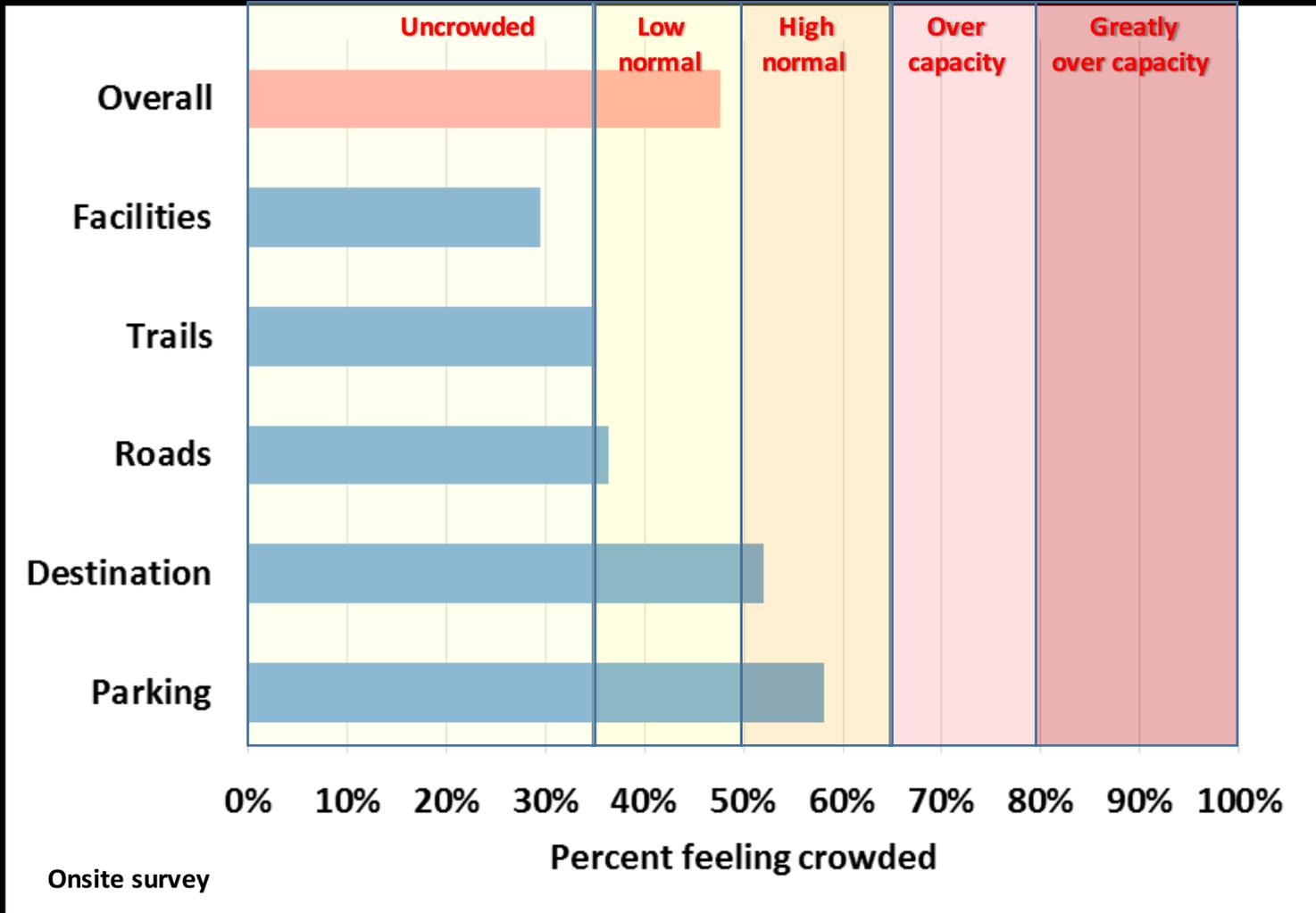
Orcas Island – Percent feeling crowded at Cascade Lake



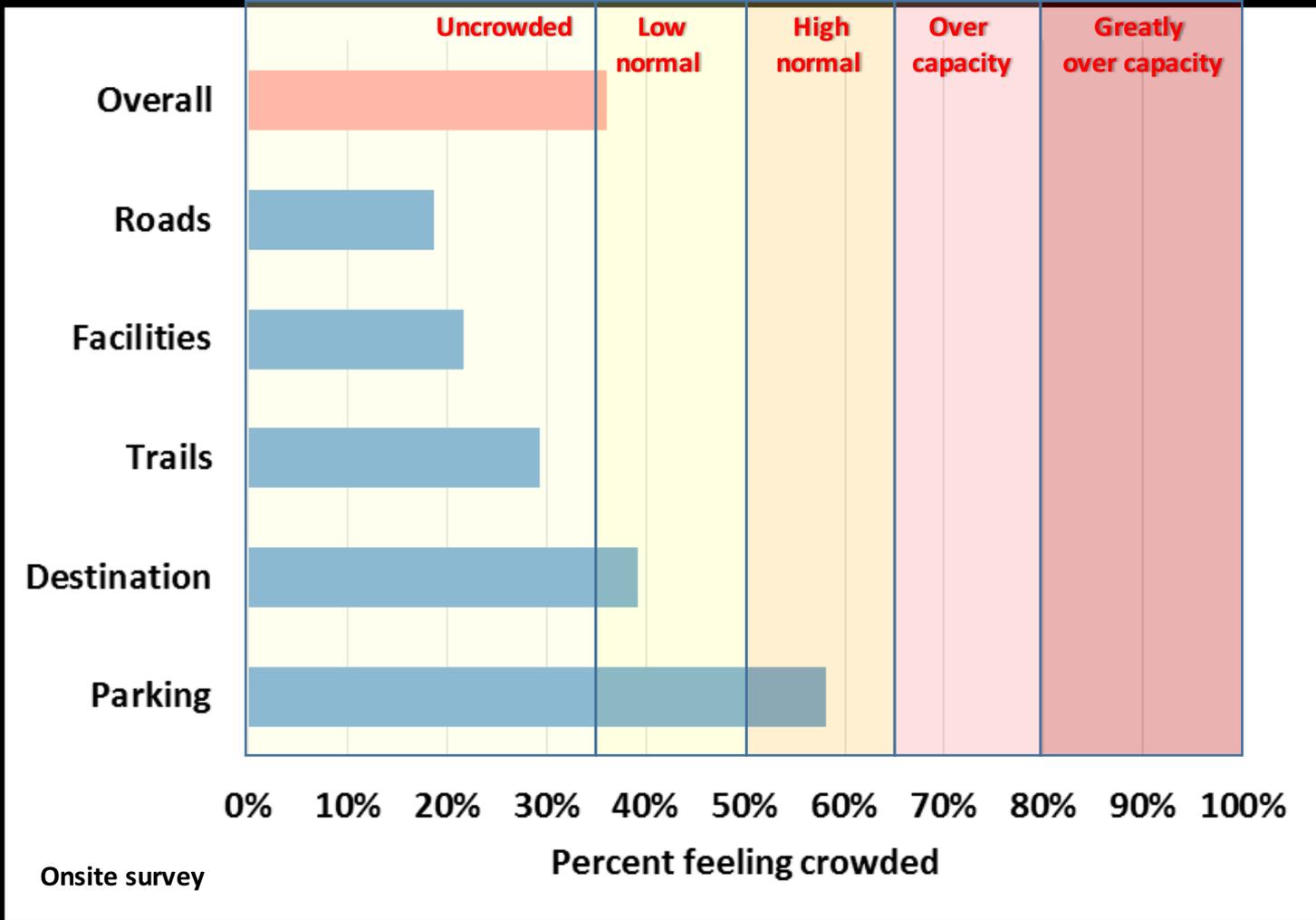
Orcas Island – Percent feeling crowded at Mountain Lake



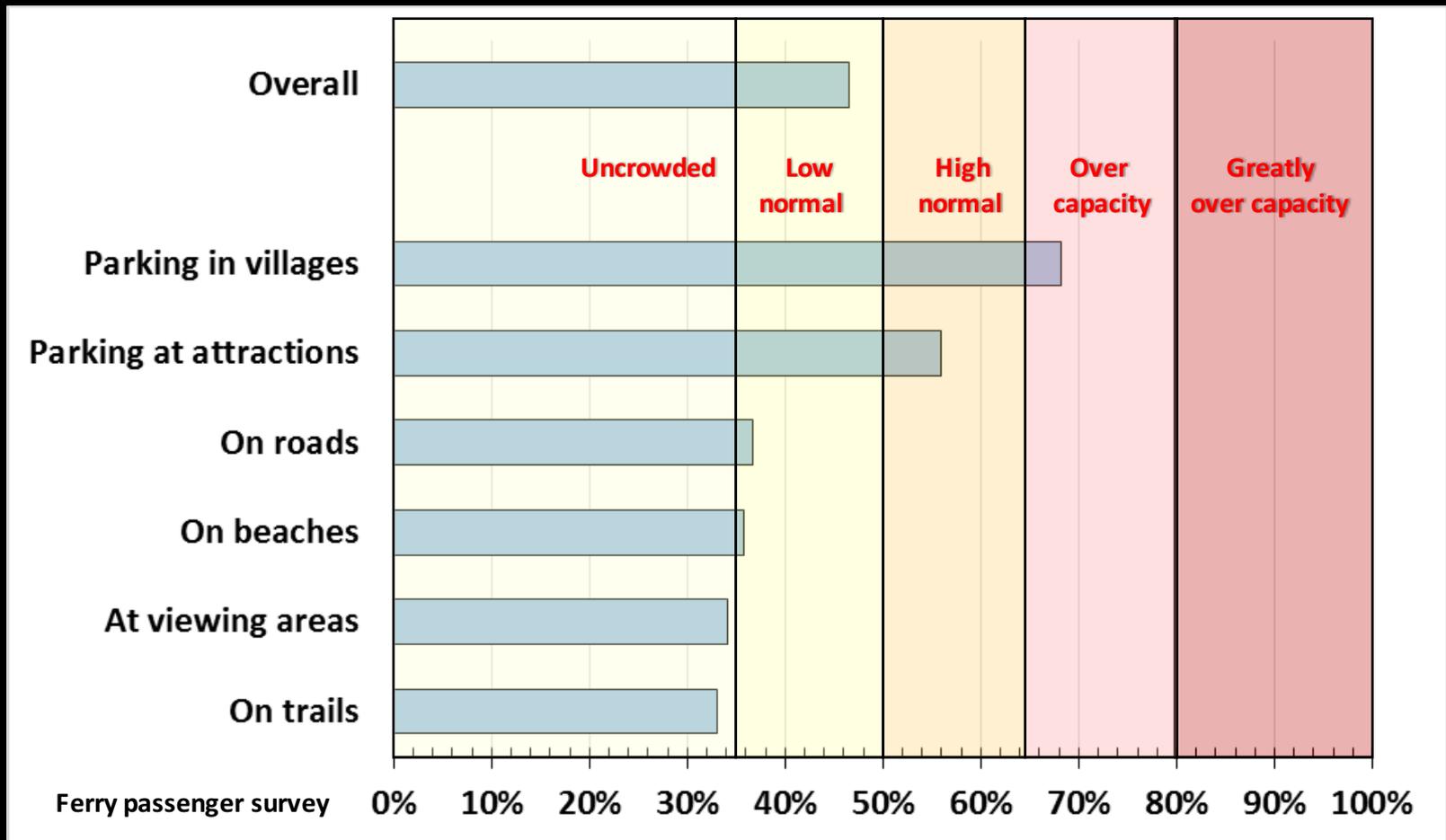
Orcas Island – Percent feeling crowded at Mt. Constitution



Orcas Island – Percent feeling crowded at Obstruction Pass

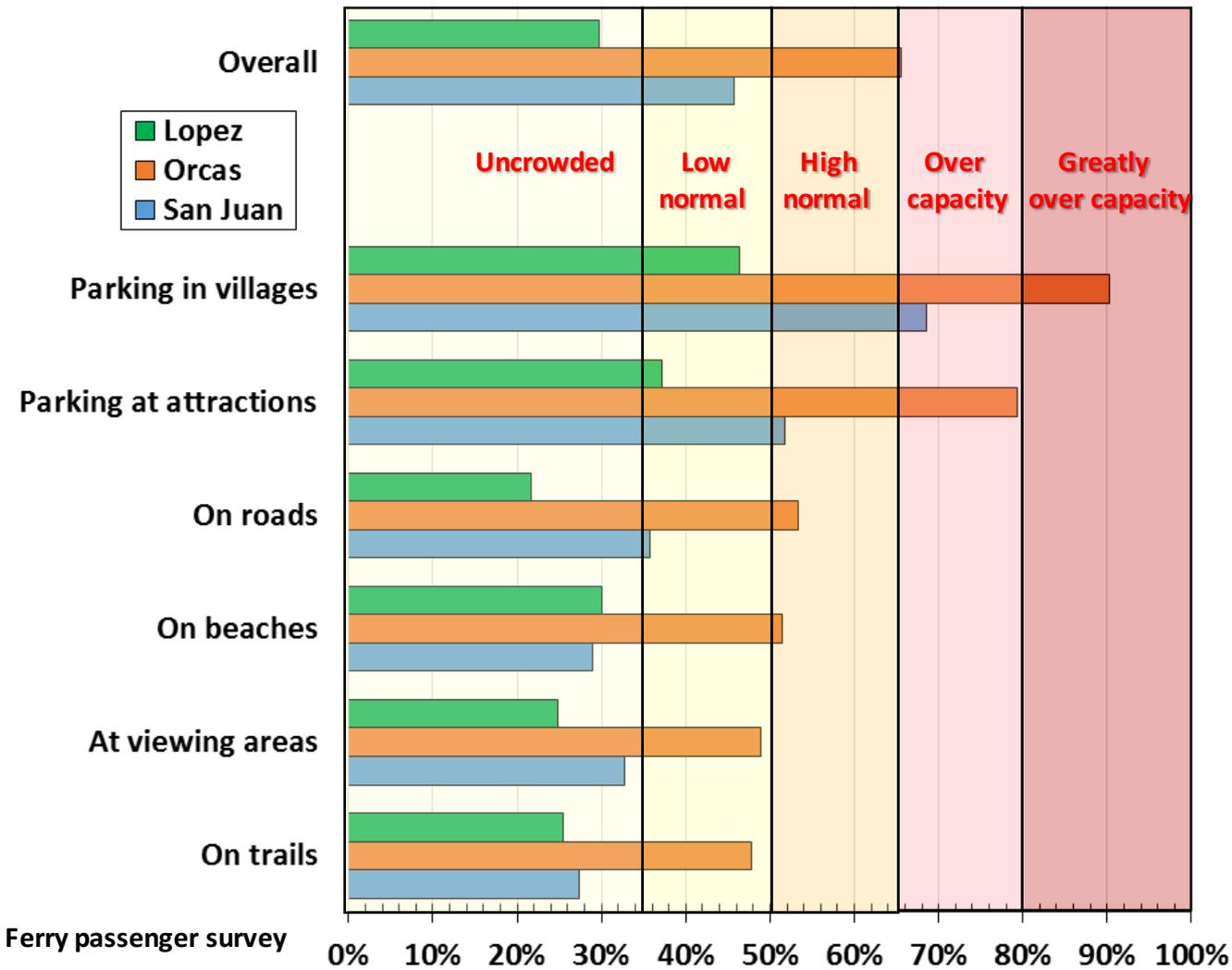


Percent of all ferry visitors feeling crowded



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

Percent of ferry visitors feeling crowded – comparing islands



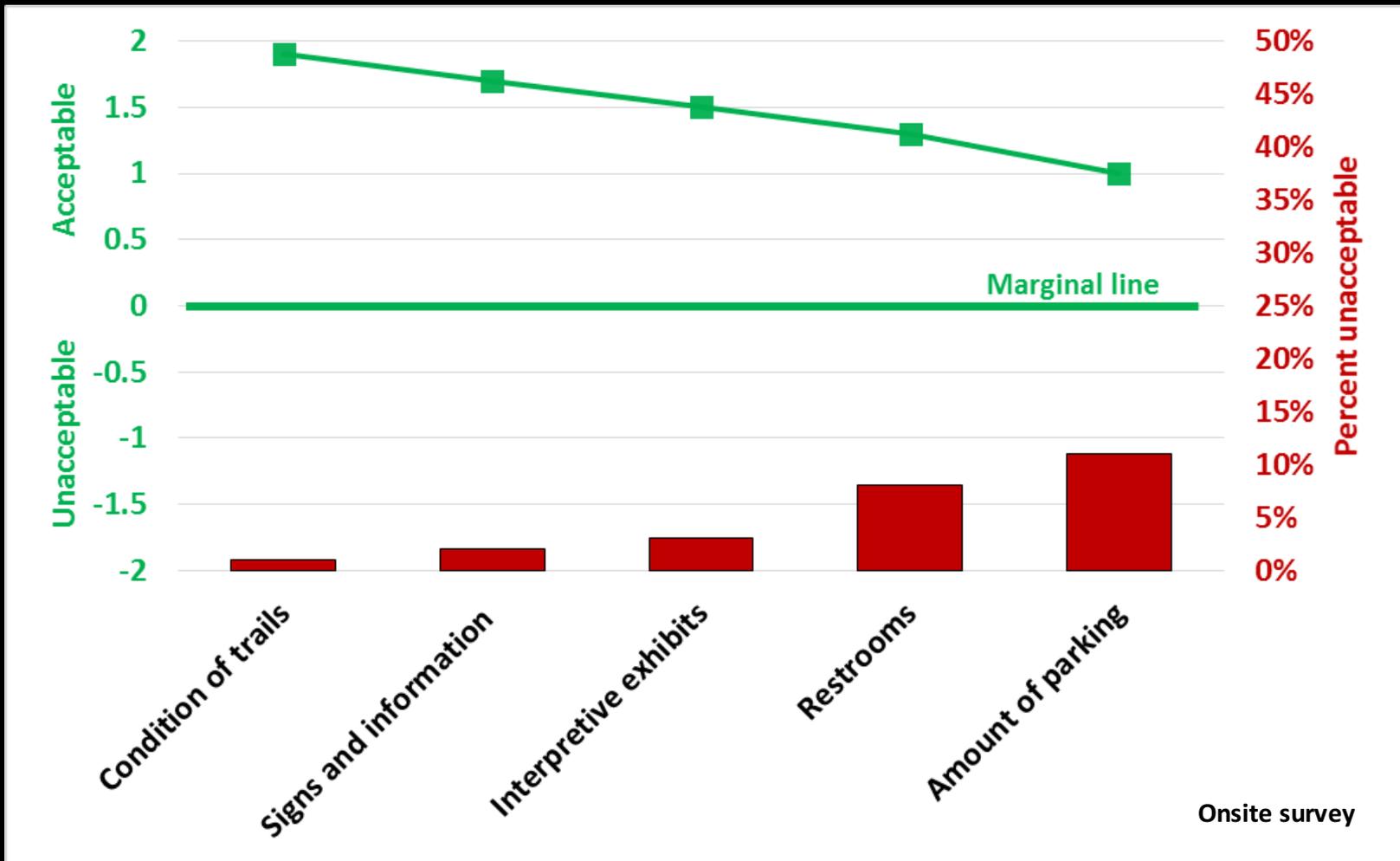
- Orcas > San Juan > Lopez for most contexts

- 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

Orcas Island – Rating conditions and facilities (all sites)



Lowest ratings:

Parking at Mt. Lake (0.9 and 12%); Mt. Constitution (0.9 and 11%)

Facilities at Mt. Constitution (0.9 and 11%)

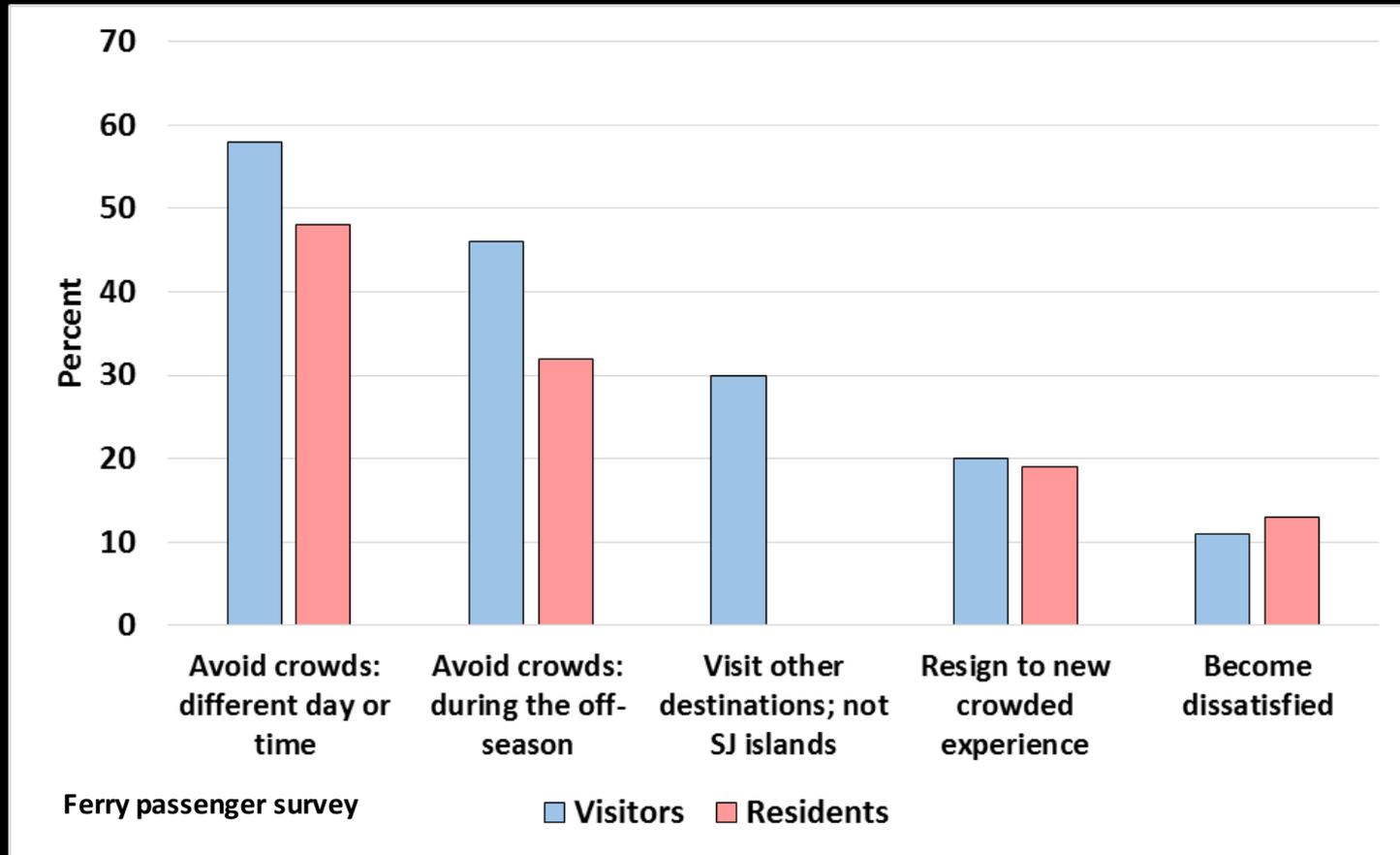
If visitation to the San Juan Islands grows higher than you'd like, how will you cope with it? *(Check all that apply)*

- 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

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

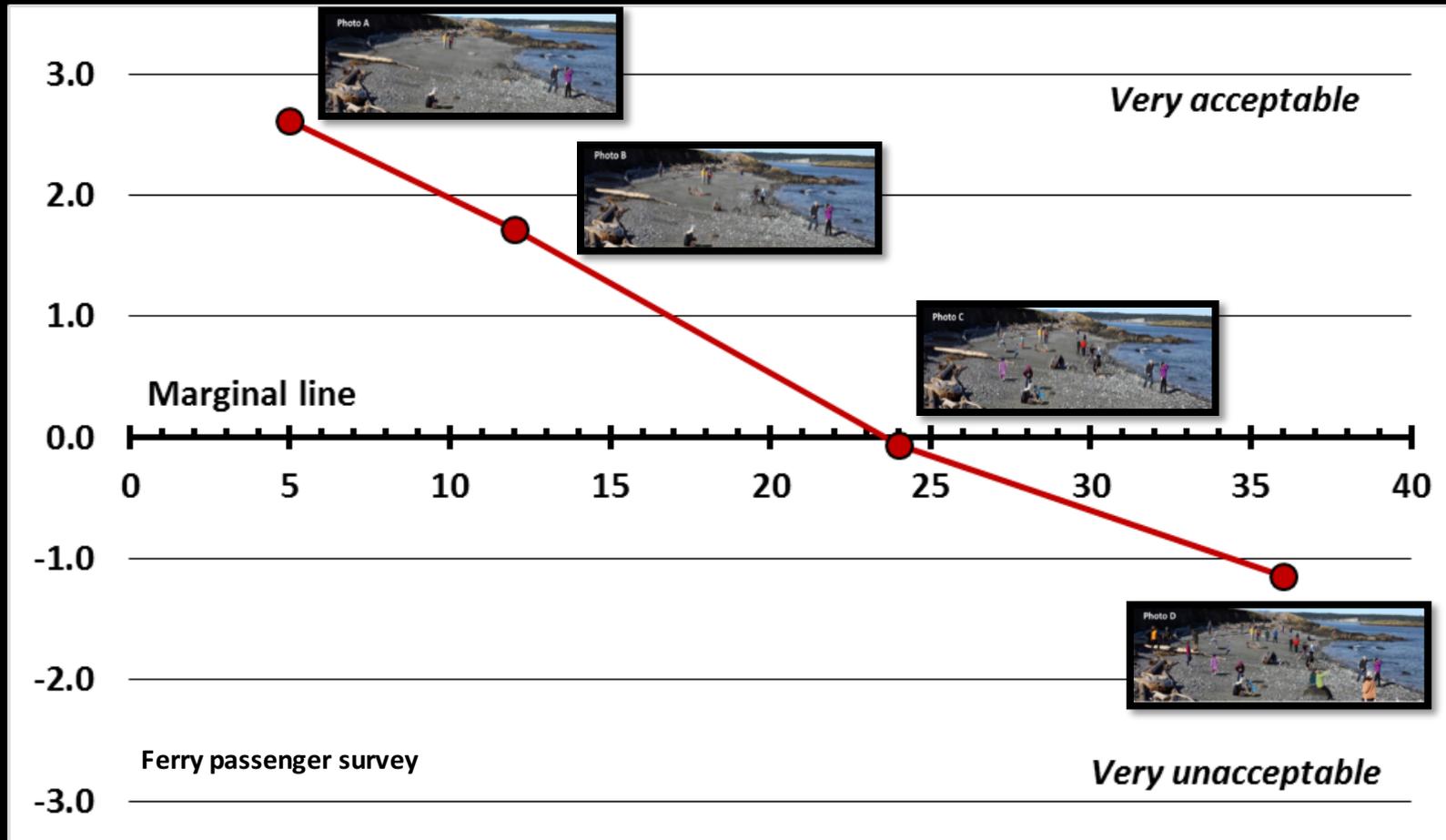


Evaluating use at
beaches

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

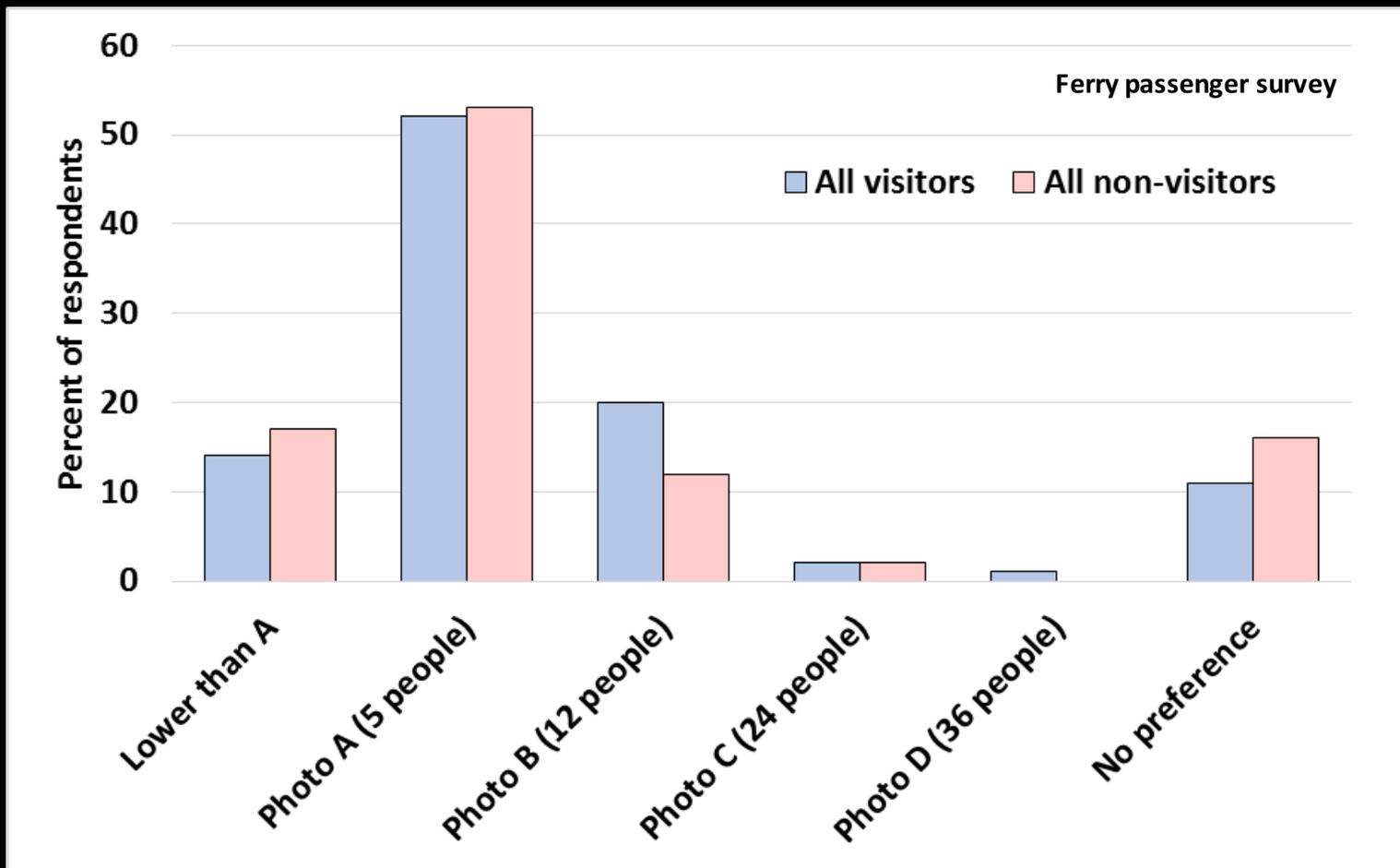


5 and 12 people acceptable; 24 at margin; 36 clearly unacceptable

No statistical differences between islands or visitors/residents

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

Evaluating use at marine wildlife viewing area

Scenic Photos

©CRC

Photo E



Photo F



Photo G

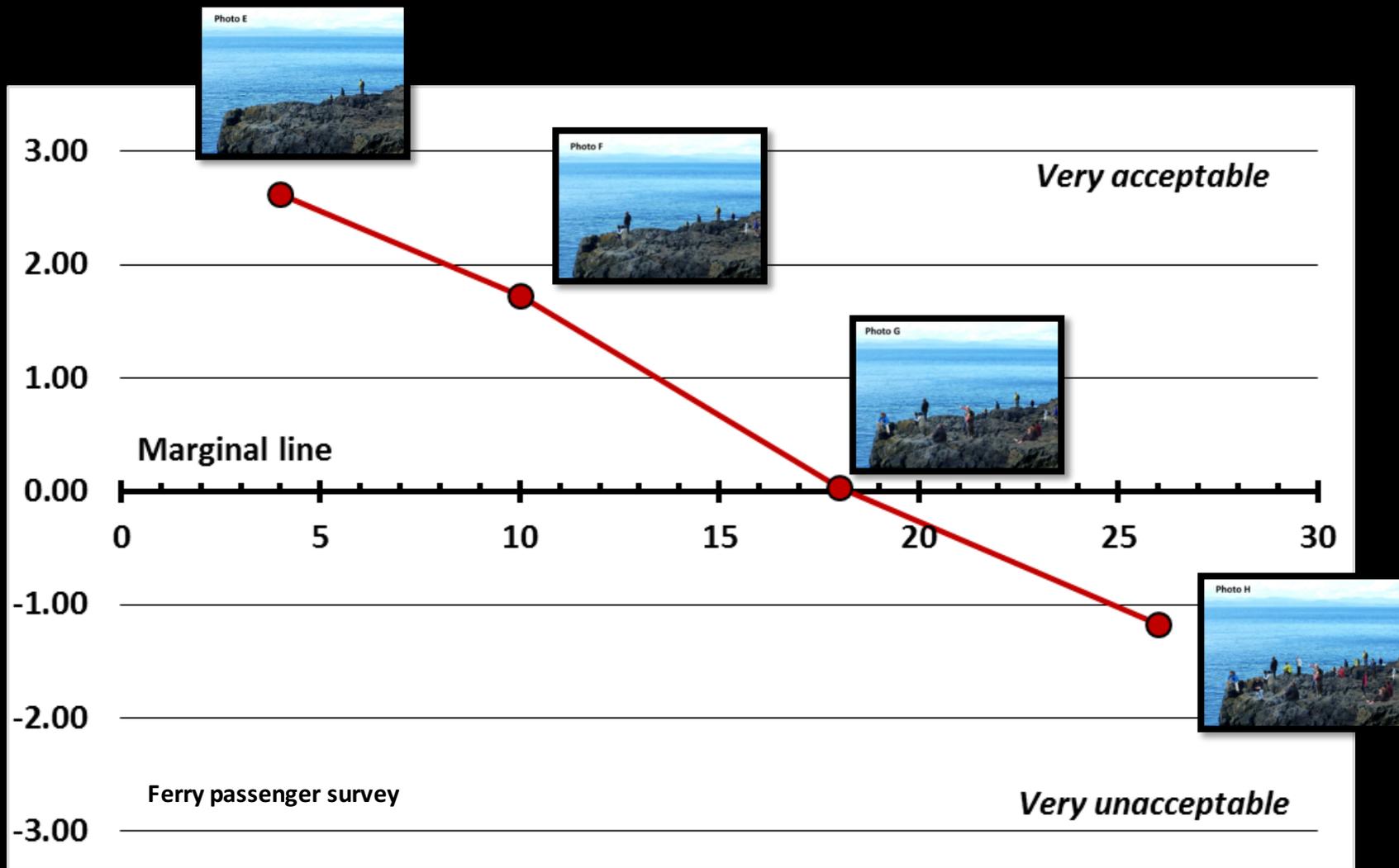


Photo H



“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

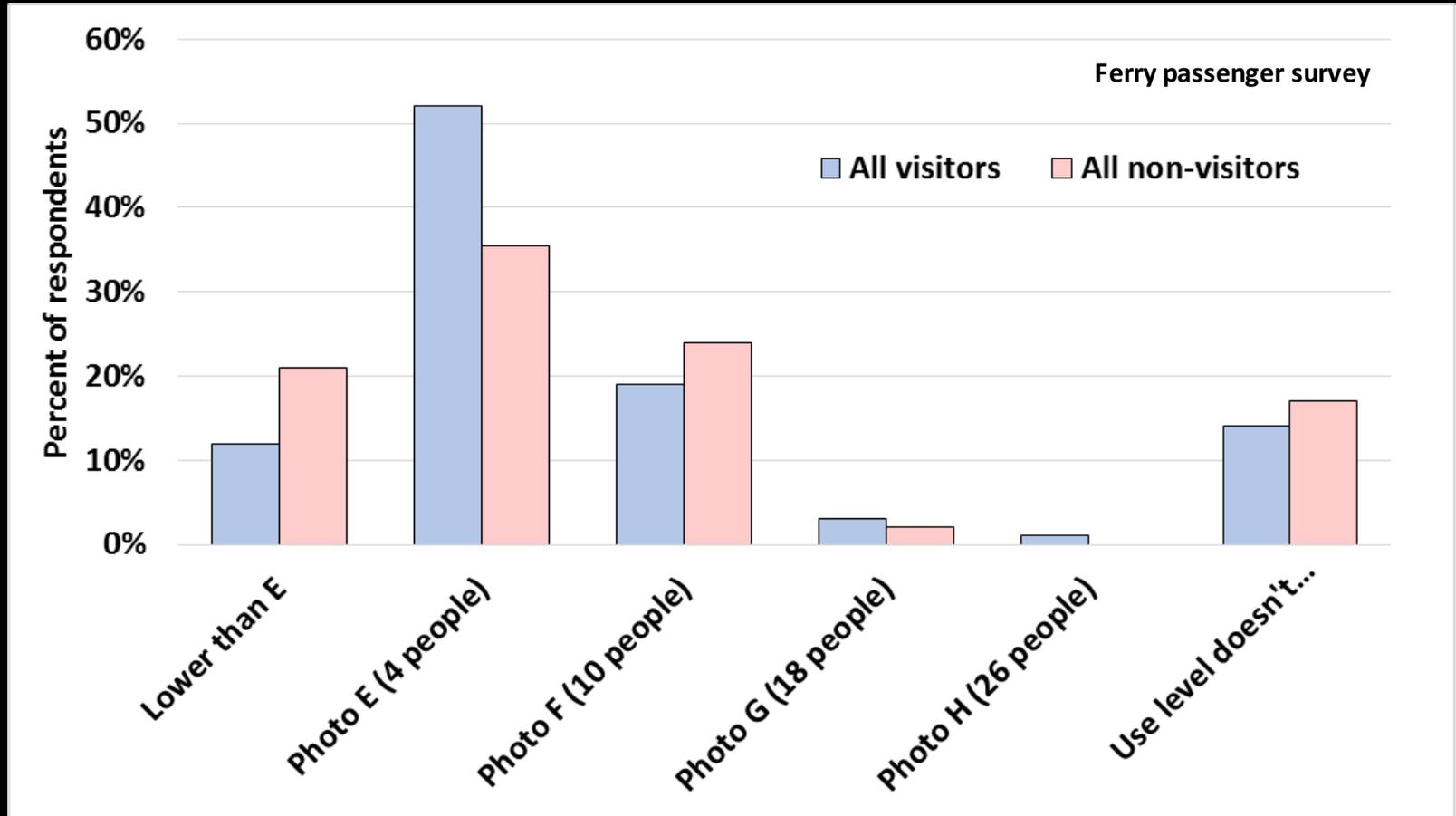
Few statistical differences between islands or visitors/residents

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

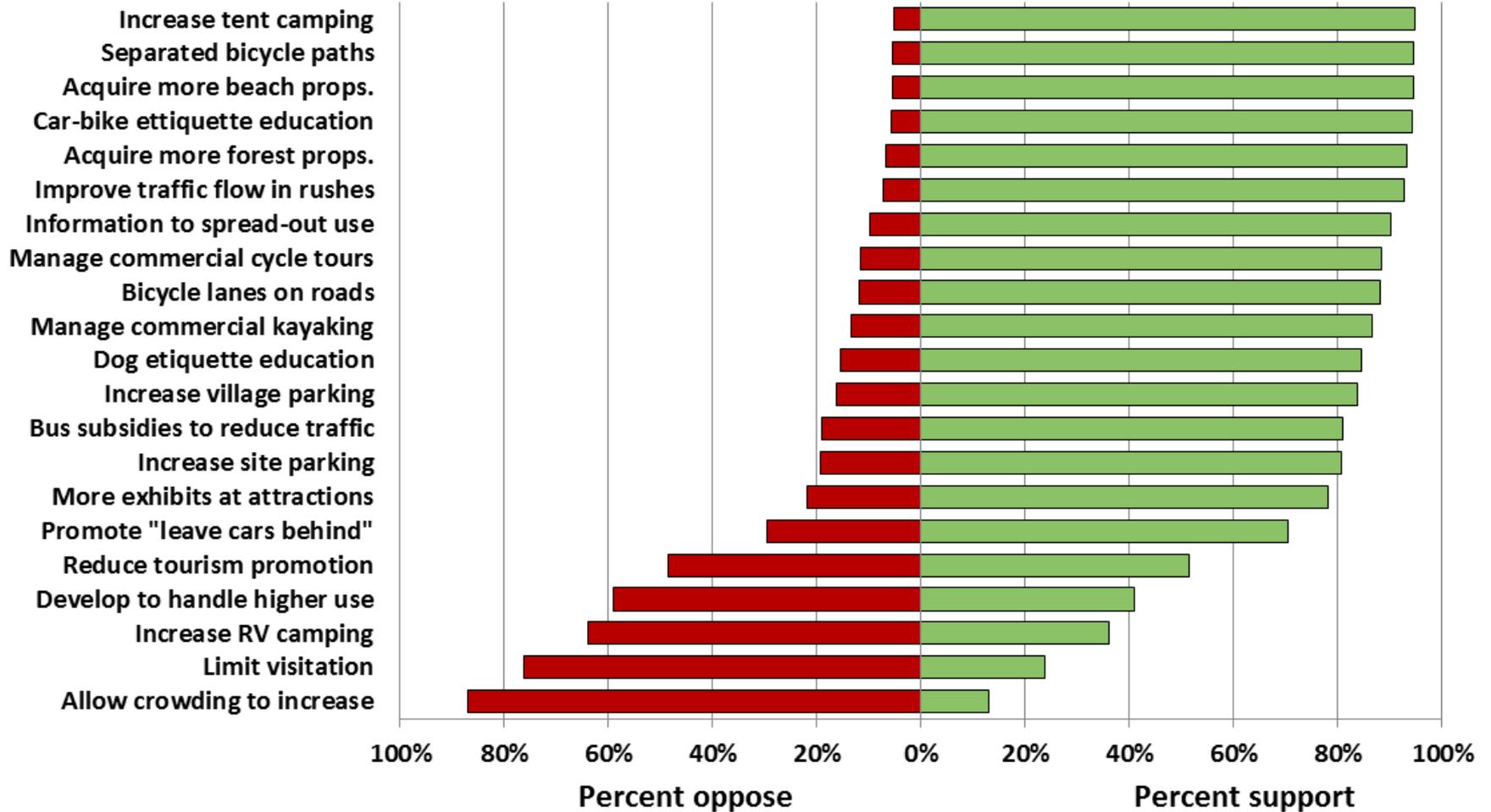
Ferry survey

Support for management actions

“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.”

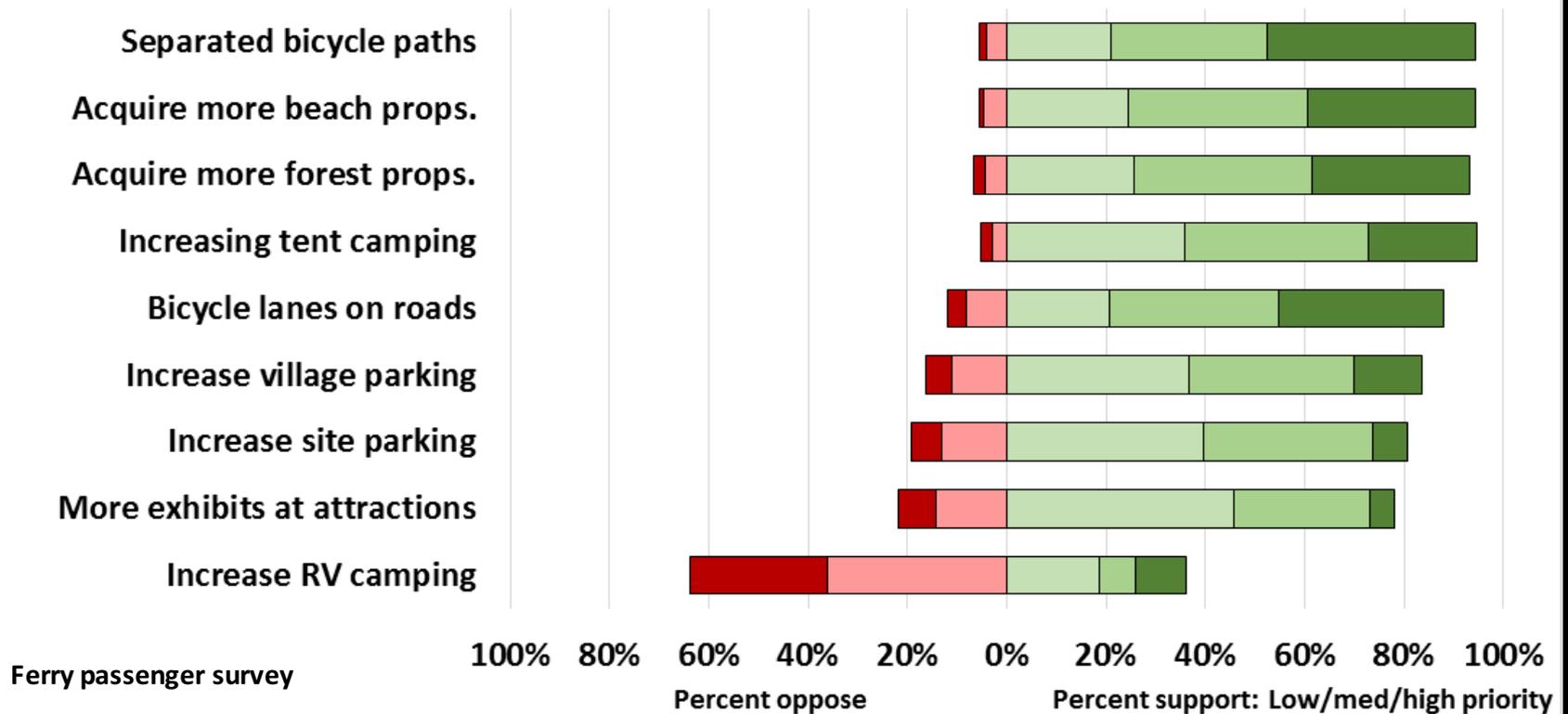
Respondents were asked about 21 different actions.

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

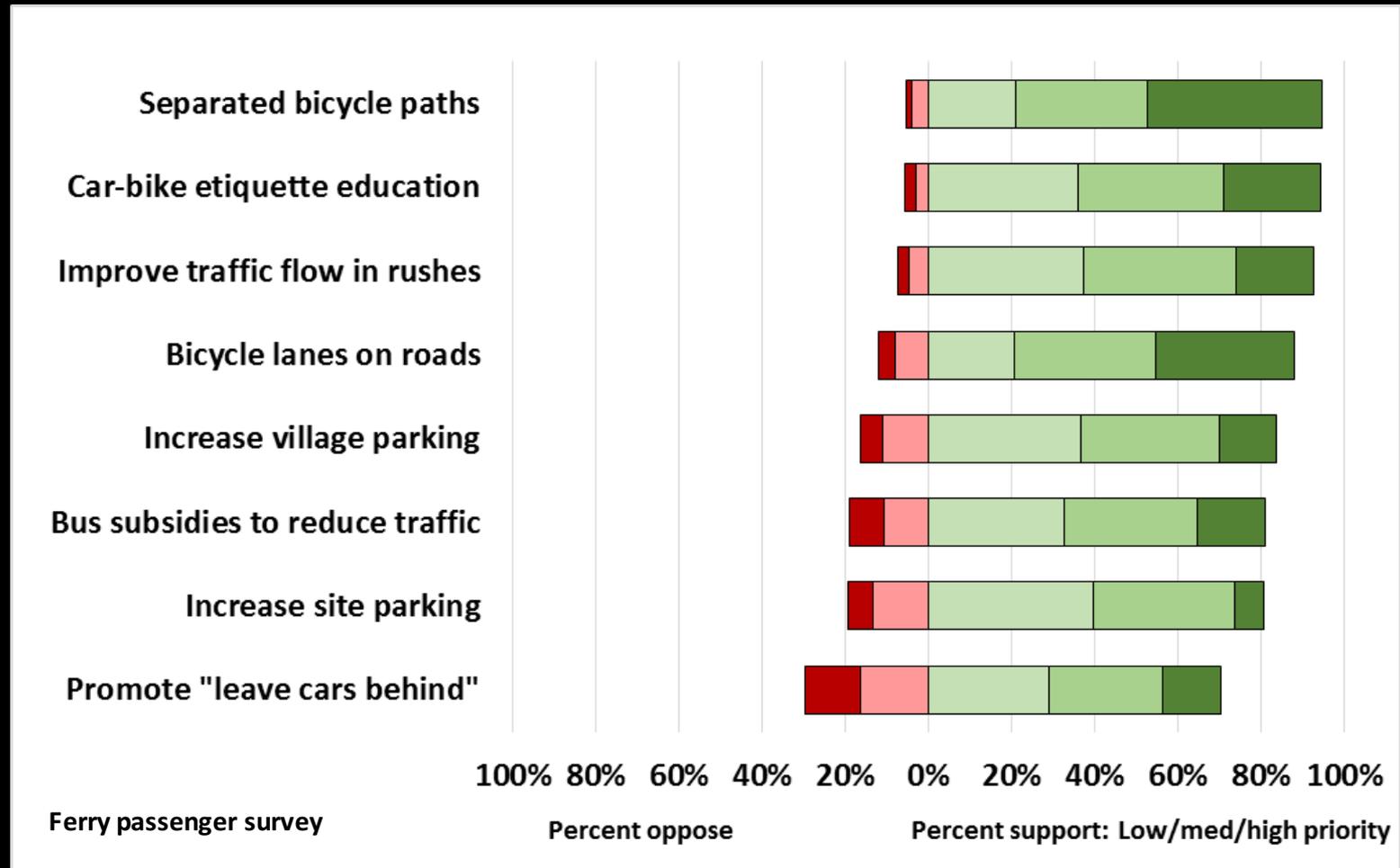
Village parking > site parking

More camping

Interpretive exhibits are lower priority

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Highest priority transportation actions among visitors



Visitors support them all

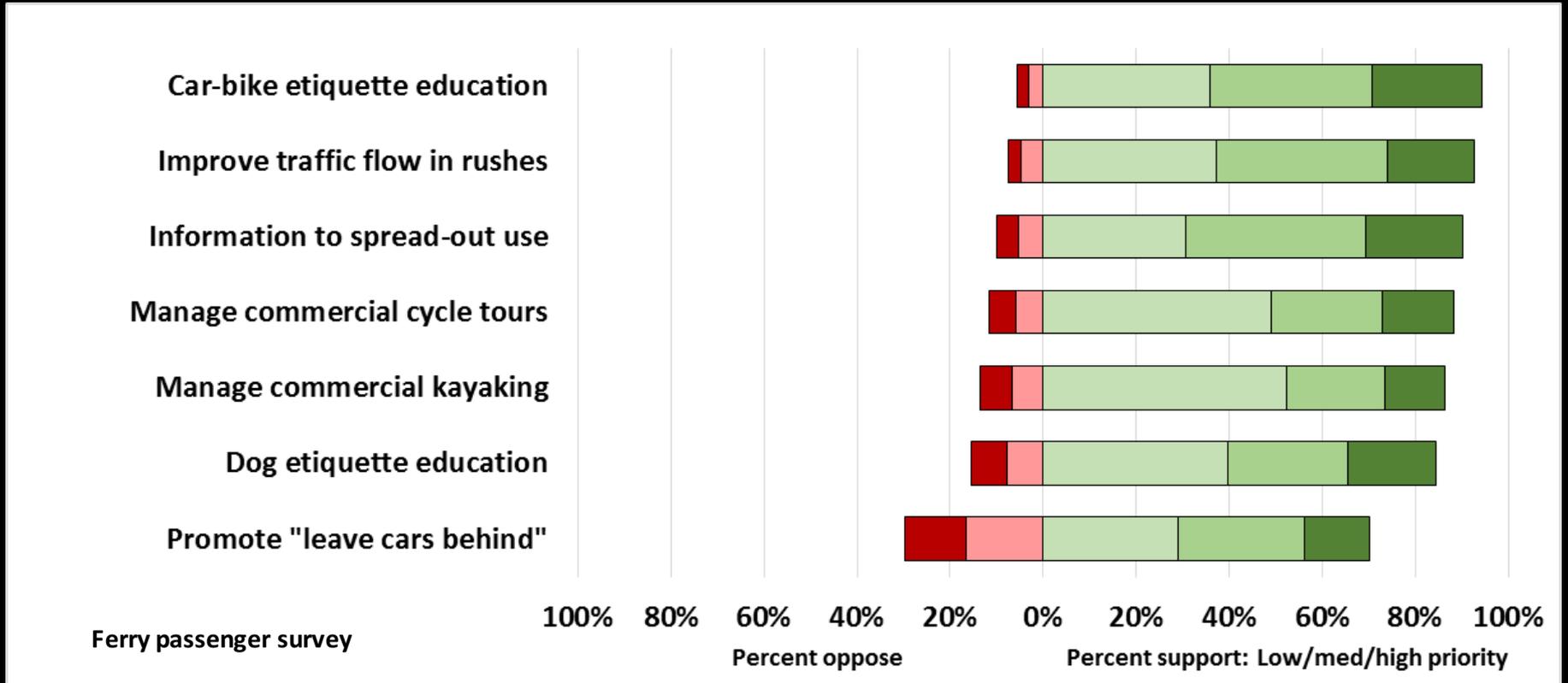
Separated bike paths > etiquette > bicycle lanes on roads

Improve traffic management in ferry rushes

Village parking > site parking

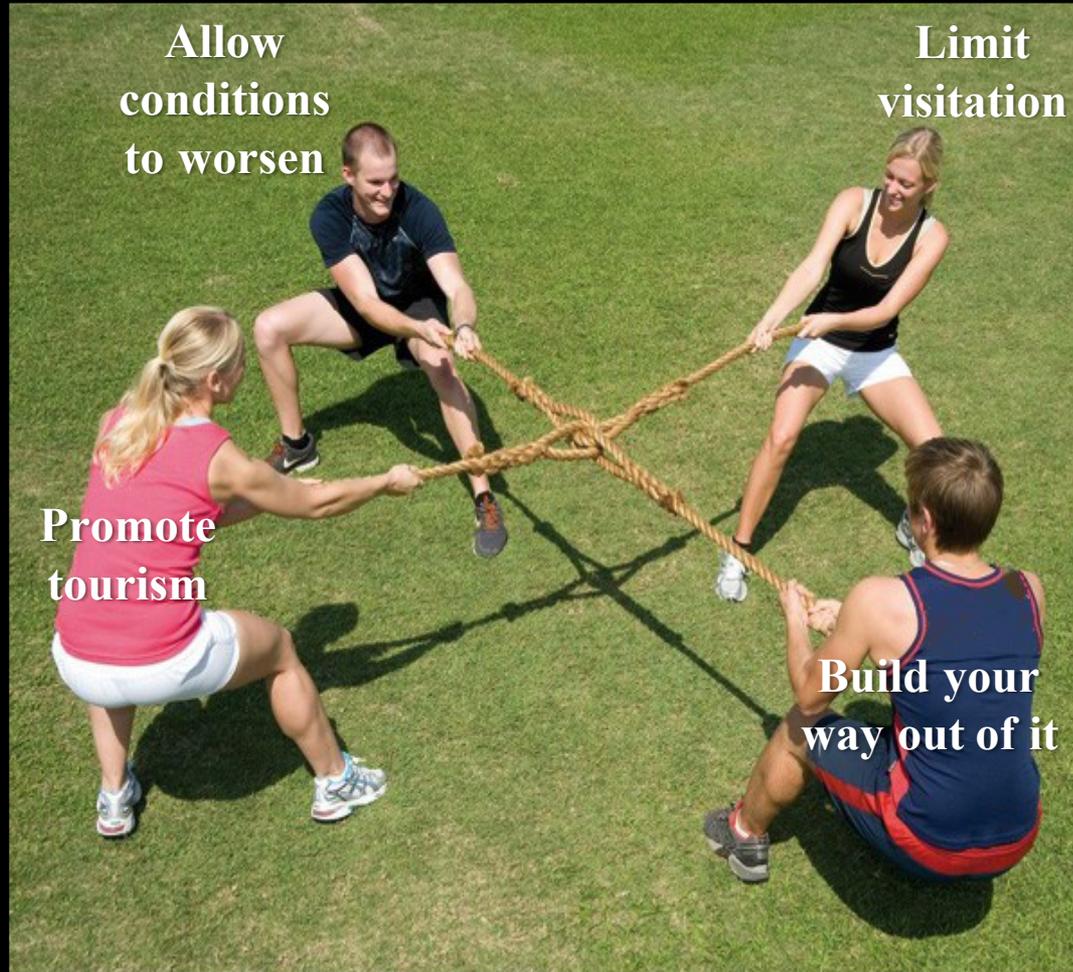
Bus subsidies > "leave cars behind"

Highest priority education actions among visitors

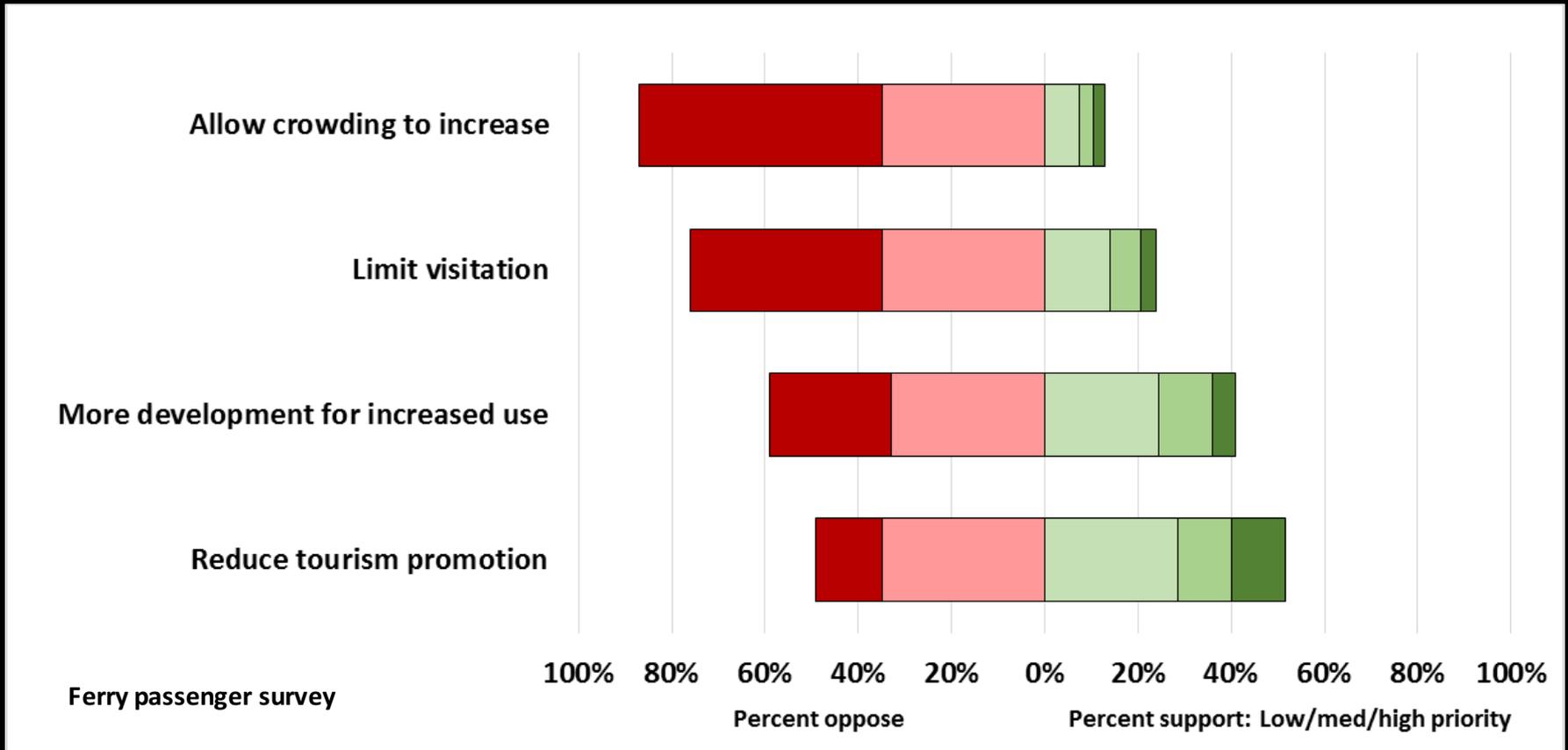


Visitors support them all
Lowest priority is promote "leave cars behind"

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%)

Barely majority support to reduce 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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