



SAN JUAN COUNTY
DEPARTMENT OF COMMUNITY DEVELOPMENT

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MEMO

REPORT DATE: July 6, 2018
TO: San Juan County Council
San Juan County Planning Commission
CC: Mike Thomas, County Manager
FROM: Erika Shook, AICP, Director DCD 
SUBJECT: 2036 Comprehensive Plan Update: Seasonal Population
JOINT MEETING: July 20, 2018

Purpose: Briefing and discussion about seasonal population estimates.

Introduction: This memorandum summarizes available information on existing and expected visitor population and provides an estimate of existing and future visitor population for planning purposes. This replaces the seasonal population discussion in the Population projection technical memorandum dated April 11, 2017.

For the purposes of planning for seasonal and visitor population, the size of the total population in the County on any given day in the peak season will provide the information necessary to develop future plans. Using a daily visitor population provides a reasonable means by which to measure impacts and assess capital facilities and service needs. The estimates in this memorandum are a peak population, which means that the numbers overestimate the average daily population. Population in vacation homes and permanent residences are included in this estimate.

Visitors and seasonal population are dependent on the availability of accommodations and transportation capacity, so Washington State Ferry Ridership and the June 2018 San Juan Islands Visitor Study provide the most current data and information on visitors.

Washington State Ferry Ridership Counts

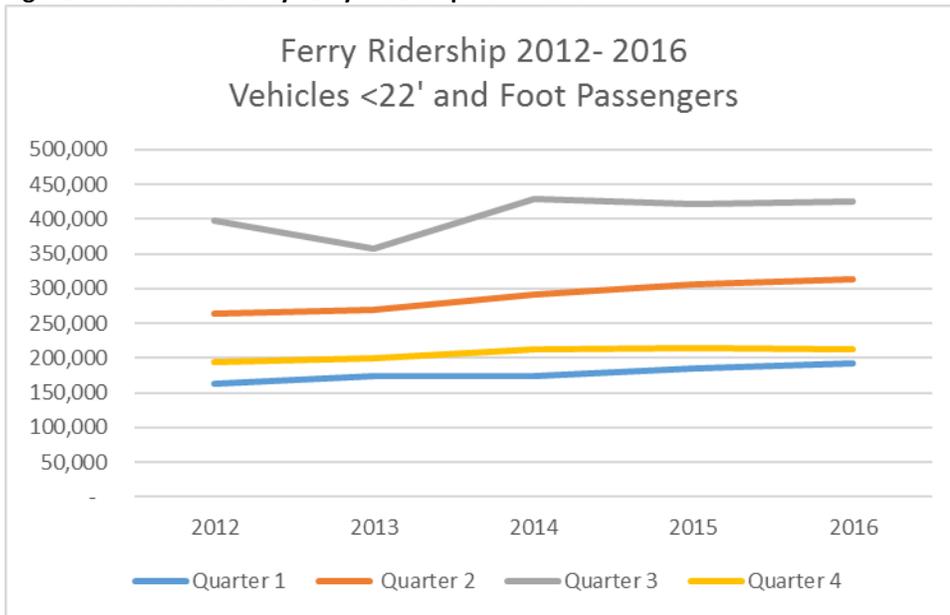
Ferry ridership counts from 2012 through 2016 in Table 1 below show that the peak season for ridership is the third quarter, July 1 through September 30 of each year. For the purposes of planning for seasonal population, the peak season is assumed to occur between July 1 and September 30.

Table 1. Total Ridership Excluding Vehicles greater than 22 feet.

Year	Quarter 1	Quarter 2	Quarter 3	Quarter 4
2012	163,362	264,622	398,004	194,696
2013	173,598	270,182	356,668	200,098
2014	173,842	291,269	428,820	212,977
2015	185,525	305,332	422,270	215,078
2016	192,346	313,360	424,890	212,253

Source: Washington State Department of Transportation.

Figure 1. San Juan County Ferry Ridership 2012-2016.



Source: Washington State Department of Transportation.

For the purposes of determining visitor population during the peak season, it is assumed that:

- first quarter ferry traffic is primarily permanent residents, and
- the number of visitors in the peak season will be the difference between first quarter riders and third quarter riders.

It also assumed that vehicles greater than 22 feet long are not used by seasonal visitors. Most of this activity is related to commercial transport of goods to the islands, any visitors with large vehicles are not likely to be statistically significant.

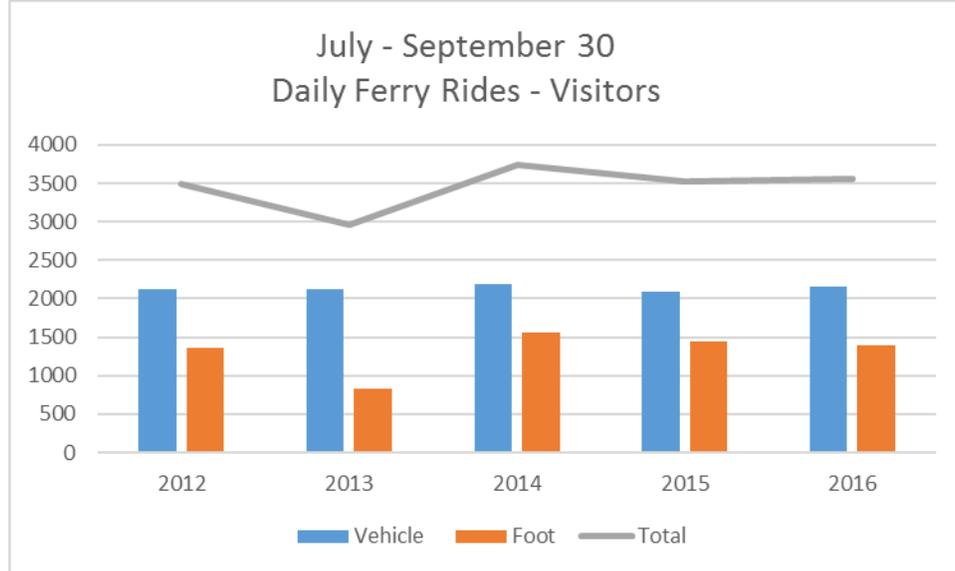
Based on these assumptions, the average daily visitor population in the peak season was about 2,538 from 2012 - 2016. This means that based on ferry ridership alone, the summer population increases 15.5 percent over the year round population (2,538 visitors/16,314 permanent population).

Table 2. Peak season average daily riders – visitors.

July 1- September 30 (90 days) Average daily riders - Visitors			
Year	Vehicle	Foot	Total
2012	1186	1359	2545
2013	1189	833	2021
2014	1271	1562	2833
2015	1201	1442	2643
2016	1248	1398	2646

Source: Source: Washington State Department of Transportation.

Figure 2. Peak Season Average Daily Riders – Visitors.



Source: Washington State Department of Transportation.

San Juan Islands Visitor Study June 2018

The San Juan Islands Visitor Study June 2018 provides analysis of transportation and accommodation capacity for visitors. Since the islands can be reached only by boat or airplane, the capacity of the transportation system is a key determinant of future visitor capacity in addition to the accommodation capacity.

Visitor Study Transportation Capacity

The San Juan Islands Visitor Study June 2018 provides estimates of peak daily visitors arriving on all types of transportation. Table 3 was extrapolated from the data in the charts found on pages 28 and 29 of the study. The typical peak and the average reported in this study are similar to the average daily ferry ridership described above. It should be noted that the data in Table 3 includes both residents and visitors.

The study found that while space is scarce on popular WSF sailings on weekends and holidays during the peak season, there is unused space for vehicles on two or three ferries each day. It also found ample space in mid-week and almost all days outside of the peak season (Memorial Day – Labor Day).

The average visitor stay was 2.5 days on San Juan Island, 3.7 days on Orcas and 3.6 days on Lopez.

Nineteen percent (19%) of all trips to San Juan, and approximately ten percent (10%) of trips to Orcas and Lopez are day trips, the remainder are overnight trips.

Table 3. Visitor Capacity – Transportation - Extrapolated.

Island	Theoretical Capacity	2017 Max Capacity	Typical Peak	Average
Lopez	7,500	2,800	2,200	1,900
Orcas	8,800	3,000	2,200	1,900
San Juan	13,250	4,000	3,500	2,500

Source: June 2018 Visitor Study.

Figure 3. San Juan Island Visitor Transportation Capacity, San Juan Islands Visitor Study June 2018.

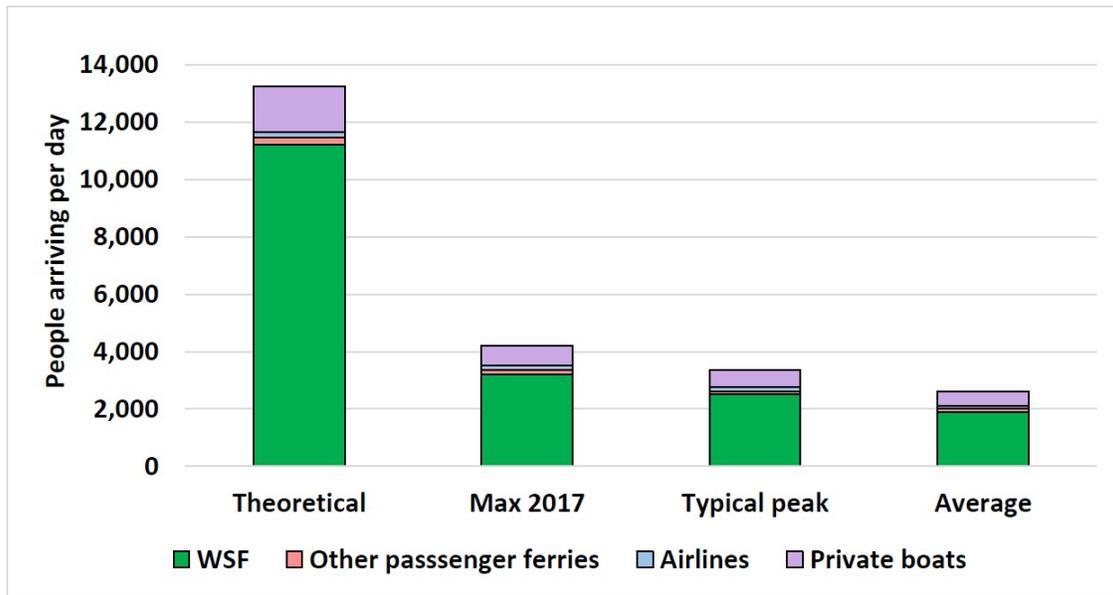


Figure 12. Estimated number of people arriving per day to San Juan Island: 1) theoretical maximum; 2) highest use in 2017; 3) typical peak in recent years; and 4) average in recent years.

Figure 4. Lopez Island Transportation Capacity, San Juan Islands Visitor Study June 2018.

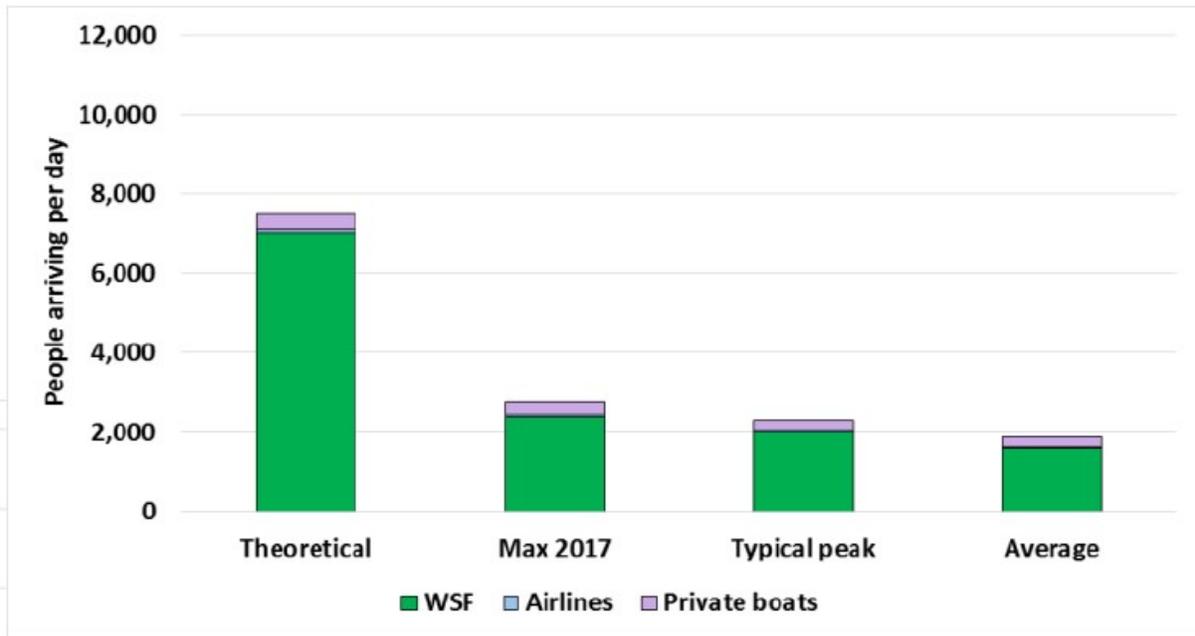
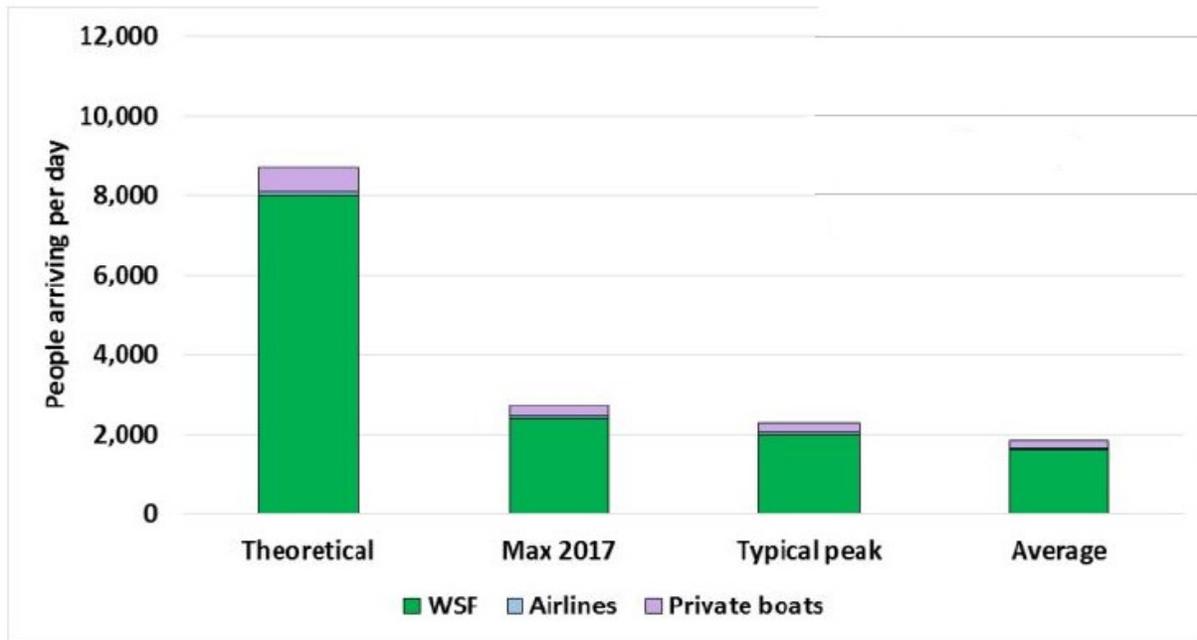


Figure 5. Orcas Island Transportation Capacity, San Juan Islands Visitor Study June 2018.



Visitor Study Accommodation Capacity

The San Juan Islands Visitor Study June 2018 describes the total number of accommodations by type and provides an analysis of theoretical capacity. There are over 2,000 accommodation units, which are categorized as campsites, vacation rentals, Bed and Breakfasts, hostels, cabins, resort/condo and hotel/inns. Vacation rentals are the largest category of accommodations, comprising nearly half of the accommodation units.

If all accommodation units were occupied to their maximum, the study finds that nearly 10,000 people could be accommodated per night in existing facilities (see Figure 6).

The study found the following:

- Most hotels/inns are fully occupied on summer weekends, but there is some capacity to accommodate additional visitor growth mid-week.
- “The overall housing stock in the County is listed as the other major accommodation supply. The current stock of vacation rentals is the single largest accommodation category, overall providing roughly a third of the units and serving roughly half the visitors (San Juan Islands Visitor Study June 2018, Page 60).”
- “The current stock of vacant housing is five times larger than the vacation rental stock. Ferry survey data show that numbers of visitors staying with friends and family are about the same as numbers in vacation rentals, which suggests that 20% of the vacant category may serve as de facto units in the vacation rentals category, occupied by people who consider themselves visitors (San Juan Islands Visitor Study June 2018, Page 60).”
- “The current accommodation supply is probably a larger constraint on visitation than the WSF system. For example, our earlier transportation analysis shows that typical peak weekends bring as many as 3,000 people per day to San Juan Island, and because they stay an average of 2.0 days, roughly 6,000 people need to be accommodated each night. The accommodation inventory suggests there is space for about 4,000 visitors on San Juan Island, so 2,000 of the ferry arrivals must be residents, or people staying in the vacation homes stock (San Juan Islands Visitor Study June 2018, Page 60).”

Figure 6. Maximum capacity of all overnight accommodations, San Juan Islands Visitor Study 2018.

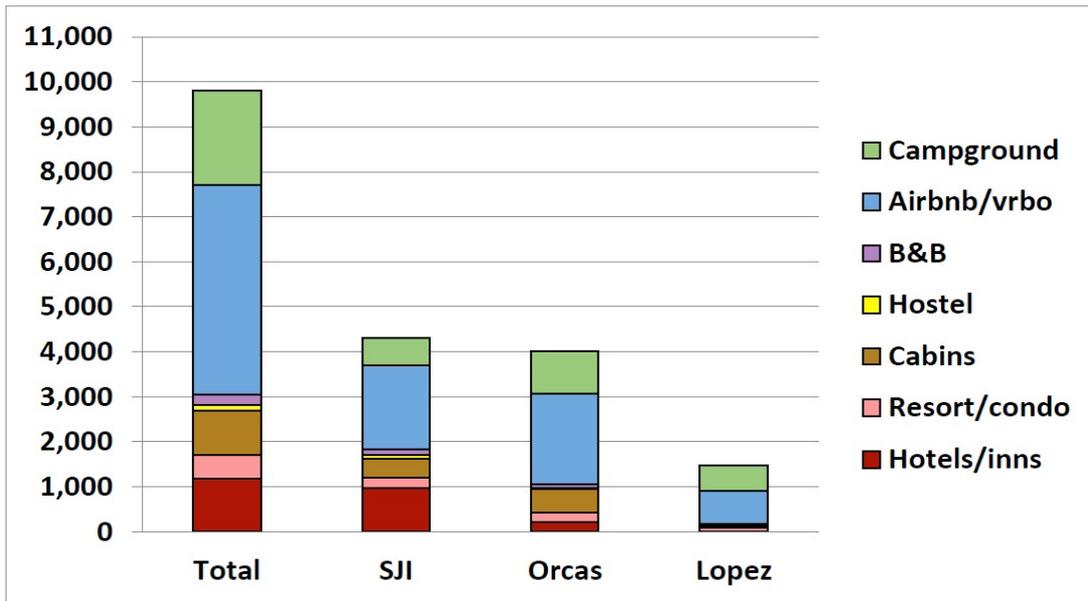
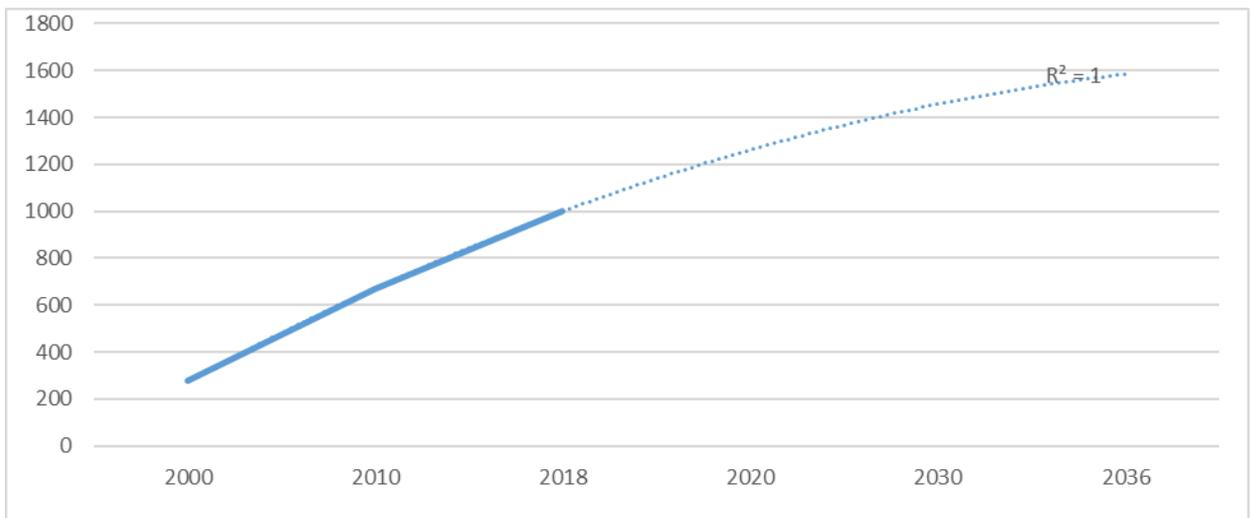


Figure 35. Estimated average overnight visitors (if all units were occupied)

Figure 7. Forecast of future vacation rentals.



Source: DCD calculations based on permit data.

Peak Daily Population Estimates

Table 4 provides an estimate of peak daily population based on the information in the San Juan Islands Visitor Study 2018:

Table 4. San Juan County estimated peak population.

Island	Typical 2017 Peak Daily WSF Ridership[1]	Percent of Total	Average Overnight Stay	Peak Daily Population	April 1, 2016 OFM Population Estimate (permanent residents)
Lopez	2,200	28%	3.6	7,920	2,466
Orcas	2,200	28%	3.7	8,140	5,395
San Juan (incl. TFH)	3,500	44%	2.5	8,750	7,810
Shaw					241
Other Islands					402
Total	7,900	100%		24,810	16,314

Source: San Juan Island Visitors Study June 2018.

Accommodation capacity is the limiting factor to growth visitor population. Vacation rental accommodations are the primary means by which additional visitor growth is likely to occur. Based on past vacation rental growth rates, an estimate of future accommodations and associated visitor population can be determined.

The average rate of growth for vacation rental permits was approximately 51 per year over the last 20 years. If current trends continue, by the year 2036 600-1,000 new vacation rental units could be added to the accommodation inventory (see Figure 7). Based on the assumptions found in the San Juan Islands Visitor Study (5 people per transient unit), this would mean capacity for an additional 3,000 - 5,000 people per night (see Table 5).

Assuming growth of vacation rentals similar to past growth trends, peak daily population for the 2036 planning period can be estimated with no changes in land use:

Table 5. 2016-2036 Estimated peak daily population.

	Vacation Rentals	Additional Visitors	Peak Daily Population	2036
Low	600	3,000	27,810	19,423
High	1,000	5,000	29,810	19,423

Source: DCD calculations.

There is no reliable data on how often vacation homes are used making estimating population and forecasting infeasible. Ferry ridership data is the best information available for this purpose because the majority of visitors and seasonal residents will arrive via ferry.

Staff Recommendation:

County Council and Planning Commission review data and analysis and provide direction to staff as to whether to use these estimates for planning purposes or whether additional data is needed.

[1]Based on Figures 3-6 and data provided in the San Juan Islands Visitor Study June 2018. Includes both visitors and residents. We do not have reliable data for Shaw Island or for the non-ferry served islands.