




SAN JUAN COUNTY
DEPARTMENT OF COMMUNITY DEVELOPMENT

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MEMO

REPORT DATE: August 2, 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 Follow-up
ATTACHMENT: July 6, 2018, Staff Report Figure 7. Forecast of future vacation rentals
JOINT MEETING: August 17, 2018

Purpose: Supplement to July 6, 2018 briefing on seasonal population estimates.

Introduction: At the July 20, 2018 joint briefing, DCD provided a memorandum that summarized available information on existing and expected visitor population and provided an estimate of existing and future visitor population for planning purposes in Tables 4 and 5, below (included for reference).

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

Accommodation capacity is the limiting factor to the growth of visitor population. Vacation rental accommodations are the primary means by which additional visitor growth is likely to occur. Based on

[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.
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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 permits 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 attached Figure 7 from July 6, 2018 staff report). Based on the assumptions found in the San Juan Islands Visitor Study (5 people per transient unit), this would mean vacation rentals would provide additional capacity for 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 is estimated in Table 5 below:

Table 5. 2016-2036 Estimated peak daily population.

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

Source: DCD calculations.

*Note: peak daily population in Table 5 was calculated by adding the additional visitors to the peak population from Table 4 above (24,810 + additional visitors = peak daily population).

There is no reliable data on how often vacation homes are used. This makes estimating seasonal 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. The peak daily population estimated above would be more visitors than could be accommodated in the existing capacity.

Maximum population in seasonal residences and vacation homes not used for vacation rental

The last piece of information requested by the Planning Commission was the maximum population that could be accommodated in seasonal residences. Table 6 calculates the additional population that might use seasonal residences that are not vacation rented (since vacation rentals are accounted for in the lodging/accommodations above). Seasonal homes are likely to be used at the same person per household (pph) rate as resident homes, so an assumption a 2.04 pph:

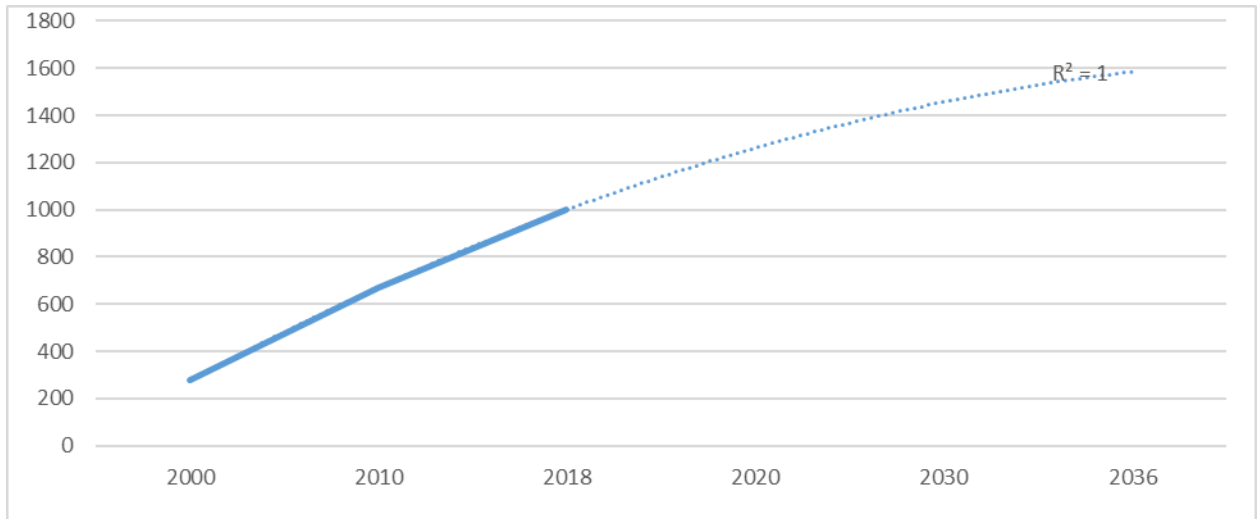
Table 6. Maximum population capacity of seasonal residences/vacation homes

	2016	2036
Total Seasonal Housing Units	5,862	8,542
Subtract Vacation Rentals	1,000	2,000
Subtotal	4,862	6,542
Max. Additional daily population capacity of seasonal residences if all units occupied (@2.04 pph)	9,918	13,346

Source: DCD calculations.

Attachment: July 6, 2018, Staff Report Figure 7

Figure 7. Forecast of future vacation rentals.



Source: DCD calculations based on permit data.