



# Tourism and visitor management in the San Juan Islands

## Part II: A survey of all-island boaters

January 2020

Prepared by

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Photo by Rachael Shelby

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*for*

**San Juan County  
Land Bank  
Parks, Recreation, and Fair  
Lodging Tax Advisory Committee  
Marine Program**

*in cooperation with*

**Bureau of Land Management  
Chambers of Commerce for San Juan, Orcas, and Lopez Islands  
National Park Service  
San Juan Conservation District  
San Juan Preservation Trust  
San Juan Islands Visitors Bureau  
US Fish and Wildlife Service  
Washington State Department of Natural Resources  
Washington State Parks**

**January 2020**

## Executive Summary

After completion of 2017 visitor surveys and other analyses in 2018, *stakeholders requested comparable data from residents/businesses, all-island boaters, and remote island boaters that visit the San Juan Islands*. The *2019 all-island boater survey* was designed to provide some of this information and address other sustainable tourism issues.

### Methods

A representative sample of boaters to the San Juan Islands (hereafter labeled the all-island boater survey) was developed from two sources:

- **On-site surveying of visiting boaters** at marina docks (including Friday Harbor and Roche Harbor on San Juan Island, both Fisherman's Bay marinas on Lopez Island, and Deer Harbor on Orcas Island).
- **Emails from boaters** who bought or were given Whale Warning Flags to use in the waters of the San Juan Islands; the flags were sold online, or were given away on specific dates at several San Juan Island marinas in summer 2019, or at regional boat shows.

### Highlight findings

**Profile of sample.** More boaters use powerboats than sailboats. Some report kayaks, probably carried on board larger craft. Most visiting boaters travel in groups of two adults with few traveling solo. About 20% bring children, typically one to three. Most San Juans boaters register their boats in Washington State, with only 9% from other states and 5% from Canada. Most boaters report 10 or more years of experience in the San Juans.

Nearly one-third of boaters start/end their trips in the San Juans or adjacent waters of the Salish Sea. Most boaters stay on their boat at a dock while visiting the islands. Very few use land-based accommodations or report day trips.

Most boaters report trips of a week or less. 20% take trips between 8 and 14 days, with 18% over 14 days. Most boaters appear to spend **multiple nights on both main and remote islands**, but spend slightly more nights at main islands (San Juan, Orcas, and Lopez).

**Onshore activities.** Most boaters report several onshore activities including visiting local restaurants/bars, buying groceries or supplies, hiking on beaches or marine shores, walking in villages, or walking in a forested/mountain area. Lesser numbers report shopping for arts and crafts or kayaking/board paddling. Few boaters report renting/using a vehicle or bicycle.

**Reasons for boating in the islands.** Similar to 2017 visitors and 2019 residents and businesses, boaters value the San Juan Islands for reasons related to natural resources. Boating-specific values are near the top of the list. The relaxed pace and friendliness of residents were more important than a lively village scene.

**Crowding.** The highest crowding ratings were from finding space to dock/moor/anchor on remote islands, and while staying at marinas (mostly Friday Harbor and Roche Harbor). These ratings were much higher than for finding space to dock/moor/anchor on the main islands.

**Evaluating tourism.** Boaters recognize both positive and negative impacts from tourism, and generally agree that current impacts are acceptable. Few reported they are irritated by the level of tourism in the islands.

**Capacity evaluations.** Most boaters indicate the San Juan Islands are at capacity (60%) or over capacity (35%) during peak summer season. 31% would support measures to limit the number of visitors if their numbers increase, while 48% said maybe, and 21% would never support limits. Boaters' capacity evaluations were more like surveyed businesses than residents.

**Support for sustainable tourism.** Boaters are similar to residents and businesses in near-unanimous support for promoting off-season use. They also supported increased infrastructure to handle visitation and limiting vacation rentals, but were more divided over limiting hotels and resorts. Boaters strongly oppose reducing ferries and limiting docking/mooring on the islands.

**Support for specific management actions.** Boaters showed majority support for 20 of the 21 management actions. The highest priority actions were education regarding etiquette for viewing marine wildlife and docking/mooring, and increasing docking/mooring on main islands. Similar to results from the 2017 visitor and 2019 resident/business surveys, boaters showed majority support for biking infrastructure and management, addressing village congestion and parking, and acquiring more public land. Boater opinions were split regarding reduced tourism promotion.

**Orca whale questions.** Boaters reported understanding new whale watching policies, and supported additional regulations. There is majority support for additional regulations to turn off fish/depth sounders (82% agree) or creating some no-go zones where orcas feed (75% agree). Results suggest boaters are willing to change their own uses to reduce impacts on whales.

## Table of contents

Introduction .....	1
Methods.....	3
Survey development .....	3
Sample development and survey administration .....	3
Analysis and reporting .....	4
Findings .....	5
Profile of the visiting boater sample (n = 211 total) .....	5
Type of boat .....	5
People on trip.....	6
Other boats on trip .....	6
Starting and ending points of trip .....	7
Launch from trailer .....	8
Lodging while on boating trips.....	8
Length of boating trips.....	9
Main island locations .....	10
Remote island locations.....	11
Nights on trip at main islands, remote islands, and outside San Juans .....	12
Home port.....	13
Boating experience .....	14
Residence on the islands.....	14
On-shore activities .....	15
Reasons for boating in the islands .....	16
Crowding.....	18
Evaluating Tourism.....	20
General opinions about San Juan Islands tourism issues .....	20
Overall capacity evaluations .....	22
Support for limits on visitor numbers.....	23
Appropriate levels of public land .....	24
Evaluating approaches or actions to address problems .....	25
Support for sustainable tourism approaches .....	25
Support for and prioritization among specific management actions .....	26
Questions about boating use around Southern Resident orcas .....	30

## Introduction

The San Juan Islands are a major northwest tourist destination, with increasing use and impacts that threaten resource health, the quality of visitor experiences, and quality of life for residents. Throughout San Juan County, several local, county, state, federal, and non-governmental organizations work with tourism and manage parks, protected areas, or recreation facilities. Collectively, these agencies understand that visitors' experiences occur across agency boundaries, and the impacts of tourism affect residents, visitors, businesses, and resource managers. As a result, ***solutions for tourism-related problems require a broad county-wide vision along with coordinated management actions.***

Over the past three years, these agencies have collectively supported or participated in several projects (listed below) to organize background information, assess current conditions, assess stakeholder or user group opinions, and brainstorm possible management actions.

- ***Visitor Management Workshop*** (October 2016) reviewed existing information, brainstormed and prioritized issues, and considered example management actions.
- ***Visitor Management Assessment*** (February 2017) summarized the workshop and existing information, including long-term visitation trends, recreation impacts, visitor management “hot spots,” information gaps, and study options to fill those gaps.
- ***2017 San Juan Islands Visitor Study*** (published February 2018) had several components.
  - ***Visitation analysis*** – described patterns and trends of visitation numbers from Washington State Ferries, other passenger ferries, cruise ships, airlines and charters, and private boats.
  - ***Counts and observations*** – provided site-specific use information at attraction sites, park units, or along road segments.
  - ***On-site survey*** – one-page survey of people at attraction sites to evaluate crowding and facility conditions, and characterize users (visitors and residents).
  - ***Ferry survey*** – six-page survey of people waiting for ferries to Anacortes (mostly visitors) covering several topics: respondent characteristics, recreation participation, attractions visited, reasons for visiting, evaluations of use densities at beach and marine viewing areas, and support for management actions.
  - ***Accommodation inventory*** – estimated the numbers and types of overnight accommodations used by visitors, compared them with visitation estimates.
  - ***2018 Public Meetings*** on all three main islands to present and discuss results from the 2017 studies listed above.
  - ***2018 Workshop with Terrestrial Managers Group*** to consider results from 2017 studies, reactions from public meetings, and next steps.

In 2019, San Juan County supported additional projects summarized in a four-part report:

- Survey of ***residents and businesses (separate report, Part I)***
- Survey of ***all-island boaters (this report, Part II)***, focused on characteristics of boaters who visit the San Juans and their opinions about general tourism issues.

- Survey of **remote island boaters (separate report, Part III)**, focused on evaluations of conditions and facilities on remote islands (those not serviced by Washington State Ferries).
- **Conclusions and recommendations (separate report, Part IV)**

Overall, the 2019 surveys provide information for these important stakeholder groups, comparable to the information about main island visitors from the 2017 on-site and ferry surveys. The information can then be used by individual agencies, cooperating groups of agencies, or the County Council to develop and implement a vision for sustainable tourism in the San Juan Islands.

## **Organization of this document**

This report presents findings by topic as listed below. Each topic includes a header, the survey question (in green), tables or graphs with results, and bullets describing key findings. **Comparisons among 2017 visitor studies, 2019 resident/business surveys, and the 2018-19 remote island boater survey are included when appropriate.**

- Profiles of the all-island boater sample
- Reasons for visiting the San Juan Islands
- Crowding
- Evaluating general tourism
  - Attitudes towards tourism
  - Capacity evaluations
- Evaluating approaches or actions to address problems
  - Support for sustainable tourism approaches
  - Support for specific management actions
  - Managing boat use around Southern Resident orcas

## Methods

After completion of the 2017 visitor surveys (primarily the ferry survey) and other analyses in 2018, **stakeholders requested comparable data representing from residents/businesses, all-island boaters, and remote island boaters that visit the San Juan Islands.** The **2019 all-island boater survey** (reported here) was designed to provide some of this information and address other sustainable tourism issues. Specific methods topics are described below.

### Survey development

Draft surveys were developed by CRC and pre-tested with the Terrestrial Managers Group (TMG; see list of agencies on report title page), the Visitors Bureau, and San Juan County Marine Program. Following comments from reviewers, CRC produced the final survey. Survey questions are provided in the results section; topics covered by surveys follow from the list provided above.

### Sample development and survey administration

The target population for the survey was **boaters visiting the San Juan Islands.** A representative sample was developed primarily from two sources:

- **On-site surveying** of visiting boaters at marina docks (including Friday Harbor and Roche Harbor on San Juan Island, both Fisherman’s Bay marinas on Lopez Island, and Deer Harbor on Orcas Island).
- **Email lists of boaters** who bought or were given Whale Warning Flags to use in the waters of the San Juan Islands; the flags were sold online, or given away on specific dates at several San Juan Island marinas in summer 2019, or at regional boat shows (Seattle and Anacortes).



On-site surveying was conducted on 12 days in July and August 2019 (see Table 1). In total, on-site surveyors approached 387 boaters. After accounting for 174 who were residents of the San Juans or not visiting by boat (and thus not eligible), 72 completed surveys, a **response rate of 33%**. The final on-site sample included 58 boaters from San Juan Island, 10 from Orcas, and 4 from Lopez.

The email sample included 431 non-duplicate addresses from the San Juan Island Marine Resources Committee (a conservation NGO). Each was sent an invitation to complete the all-island boater survey online. After accounting for undeliverable invitations (mostly bad addresses), 137 visiting boaters completed surveys, a **response rate of 34%**.

The all-island boater response rates (33% on-site, 34% email) are lower than the response rates for surveys of residents (43%) and businesses (57%), but higher than recent County surveys of residents related to parks and open space (20% and 12%).

Taken together, the two methods produced a total of **211 surveys from boaters**, which exceeded the study target of 200. This provides estimates with a margin of error about 7% (with 95% confidence). Our sampling methods may under-represent visiting boaters who do not 1) visit the larger marinas on the three main islands, or 2) attend boating shows. It may over-represent visiting boaters with an interest in whale conservation (two-thirds of the sample came from those who obtained a Whale



Warning Flag). The sample also includes some boaters who have residences in the San Juan Islands (residents were filtered out during the on-site marina sampling, but some were included in the email whale flag sample).

**Table 1. On-site surveying on San Juan, Orcas, and Lopez Islands in 2019.**

<b>Marina</b>	<b>Boater groups approached</b>	<b>Eligible groups (visiting boaters)</b>	<b>Surveys completed</b>
<b>Roche Harbor</b>	<b>162</b>	<b>81</b>	<b>21</b>
<b>Friday Harbor</b>	<b>187</b>	<b>108</b>	<b>37</b>
<b>All San Juan Island</b>	<b>349</b>	<b>189</b>	<b>58</b>
<b>Islander Resort</b>	<b>13</b>	<b>10</b>	<b>4</b>
<b>Island Marine Center</b>	<b>1</b>	<b>1</b>	<b>0</b>
<b>All Lopez Island</b>	<b>14</b>	<b>11</b>	<b>4</b>
<b>Deer Harbor</b>	<b>18</b>	<b>12</b>	<b>10</b>
<b>All Orcas Island</b>	<b>18</b>	<b>12</b>	<b>10</b>
<b>All islands</b>	<b>387</b>	<b>213 (55%)</b>	<b>72 (33%)</b>

## **Analysis and reporting**

Analysis includes descriptive statistics, statistical comparisons among groups, and correlations among variables. For the sake of parsimony, the report focuses on statistically significant ( $p < .05$  unless otherwise noted) and substantively important differences.

## Findings

### Profile of the visiting boater sample (n = 211 total)

#### Type of boat

What boat(s) are you using on this trip? (Check all that apply)  
 Kayak    Sailboat (length: \_\_\_\_\_)    Powerboat (length: \_\_\_\_\_)    Other: \_\_\_\_\_

**Table 2. Types of boats reported by visiting boaters.**

	Count	Percent <sup>1</sup>	Avg. Length (feet)
<b>Kayak</b>	16	8	--
<b>Sailboat</b>	66	32	36
<b>Powerboat</b>	140	66	37

1. Percentages do not sum to 100 because respondents could use more than one boat.

- About two-thirds of boaters use powerboats, while one-third use sailboats. About eight percent report kayaks, probably carried on board larger craft.
- Based on Washington State boat registrations (2017), about 4% of boats are sailboats, 9% are cabin powerboats, and 60% are open motorboats (the remainder are classified as houseboats, inflatable boats, personal watercraft, or pontoon boats). Not surprisingly, San Juan Island boaters in this survey report higher proportions of sailboats and cabin powerboats than the state registration proportions (which include many inland settings less conducive to larger boats).
- Average lengths of sail and power boats are similar (36 to 37 feet), but this is double the Washington State median (18 feet).
- 69% of sailboats were under 40 feet, compared to 40% of powerboats. The longest powerboat was 100 feet, with 7% over 60 feet. The longest sailboat was 64 feet (the only one over 60).
- Other boats included dinghies (5), tenders (3), SUPs (2), and the ferry (2).

## People on trip

How many people (including yourself) and dogs are on your boat on this trip?  
 \_\_\_ adults \_\_\_ children \_\_\_ dogs

**Table 3. Group sizes.**

	Percent reporting any <sup>1</sup>	Median	Average
<b>Adults</b>	--	2.0	2.7
<b>Children</b>	20	1.0	1.1
<b>Dogs</b>	27	1.0	0.9

1. Percent of total sample reporting any children or dogs on trip.

- Most boaters travel in groups of two adults (64%), with only 6% solo, and 31% in larger groups. The average number of adults was 2.7; the largest was 8.
- About 20% bring children, typically one to three (average is 1.1).
- About 27% bring dogs, 66% of these report one dog.

## Other boats on trip

How many **other** boats are traveling with you on this trip? \_\_\_\_\_ other boats

**Table 4. Travel with other boats.**

	Percent
<b>No other boats</b>	86
<b>1 other boat</b>	8
<b>2 other boats</b>	2
<b>3 or more</b>	4

- Nearly all boaters travel alone (86%) or with one other boat (8% more; total of 94%).

## Starting and ending points of trip

Where will you start and end boating on this trip (name of access / marina)?  
 Start: \_\_\_\_\_ End: \_\_\_\_\_

Table 5. Starting and ending points of trip.

	Start trip (%)	End trip (%)
<b>All San Juan islands (together)</b>	29	29
<b>Friday Harbor</b>	12	11
<b>Roche Harbor</b>	4	4
<b>Orcas Island</b>	4	5
<b>Lopez Island</b>	3	2
<b>Other San Juan islands</b>	6	7
<b>Closer mainland U.S. locations (together)</b>	34	32
<b>Fidalgo/Whidbey Islands (includes Anacortes)</b>	26	24
<b>Bellingham</b>	8	8
<b>Farther mainland U.S. (together)</b>	31	29
<b>Seattle</b>	11	12
<b>Kitsap/Hood Canal</b>	11	8
<b>Tacoma/Olympia</b>	5	5
<b>Everett</b>	4	4
<b>British Columbia, CAN</b>	5	5
<b>HI, AK, OR, CA</b>	2	2

- Roughly equal percentages (29-34%) start/end their trips in 1) the San Juan Islands, 2) closer U.S. mainland locations on Fidalgo or Whidbey (e.g., Anacortes or Oak Harbor), or 3) mainland locations in Puget Sound (e.g., Everett, Seattle, Tacoma, Hood Canal).
- Relatively few began their trips from out-of-state or Canada.

## Launch from trailer

Did you launch your boat from a trailer for this trip?

Yes

No

- 94% of boaters did not launch from a trailer, suggesting that most keep their boats at marinas or docks.

## Lodging while on boating trips

Where are you staying tonight (or last night of your trip in the online version)?

On boat – docked     On boat – anchored     On boat – on a mooring

In a campsite     In a hotel / B&B     In a rental house     I'm only here for the day

Other please specify: \_\_\_\_\_

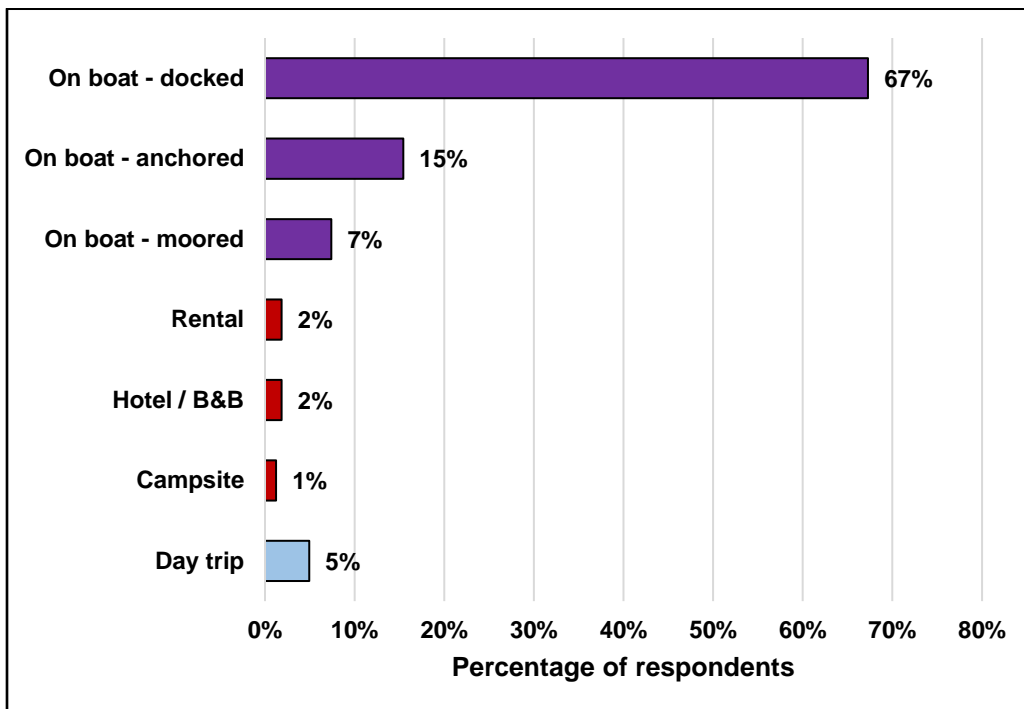


Figure 1. Lodging while on boating trips.

- Most boaters (67% total) stay on their boat at a dock while visiting the San Juan Islands (shown in purple), with another 15% at anchorages and 7% on moorings.
- 5% stay in on-land accommodations (shown in red) such as vacation rentals (2%), hotels (2%), and campgrounds (1%).
- 5% report day trips; most of these come from Bellingham or Anacortes.

## Length of boating trips

How many days (including first and last) will you spend boating in the San Juan Islands on this trip?  
\_\_\_\_\_ days

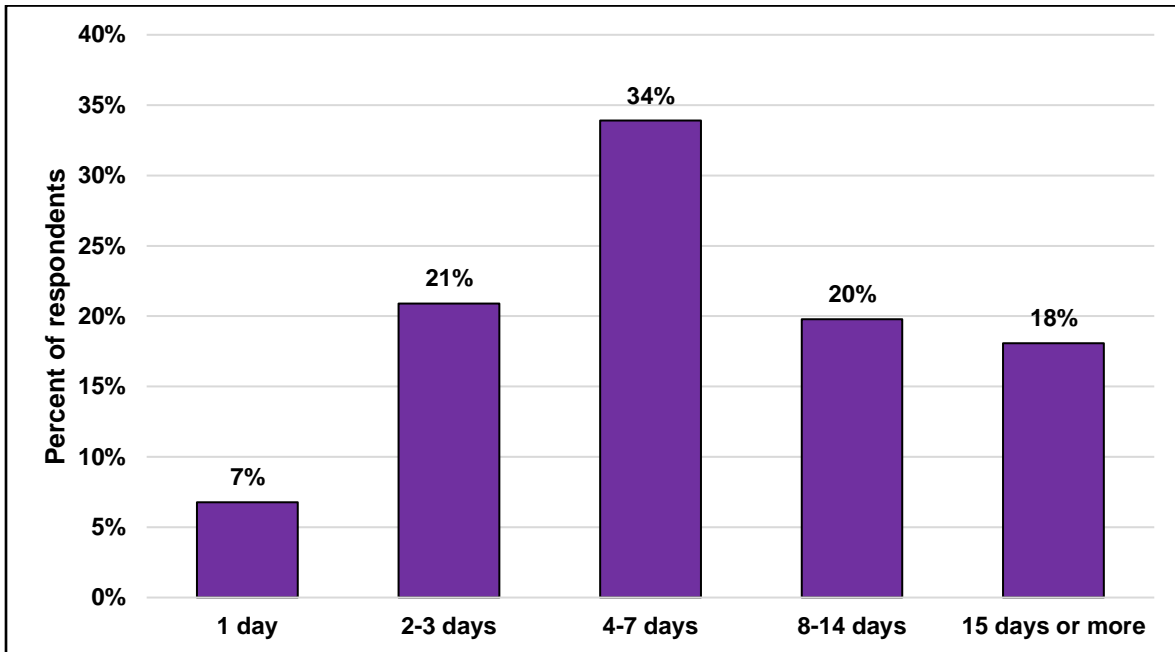


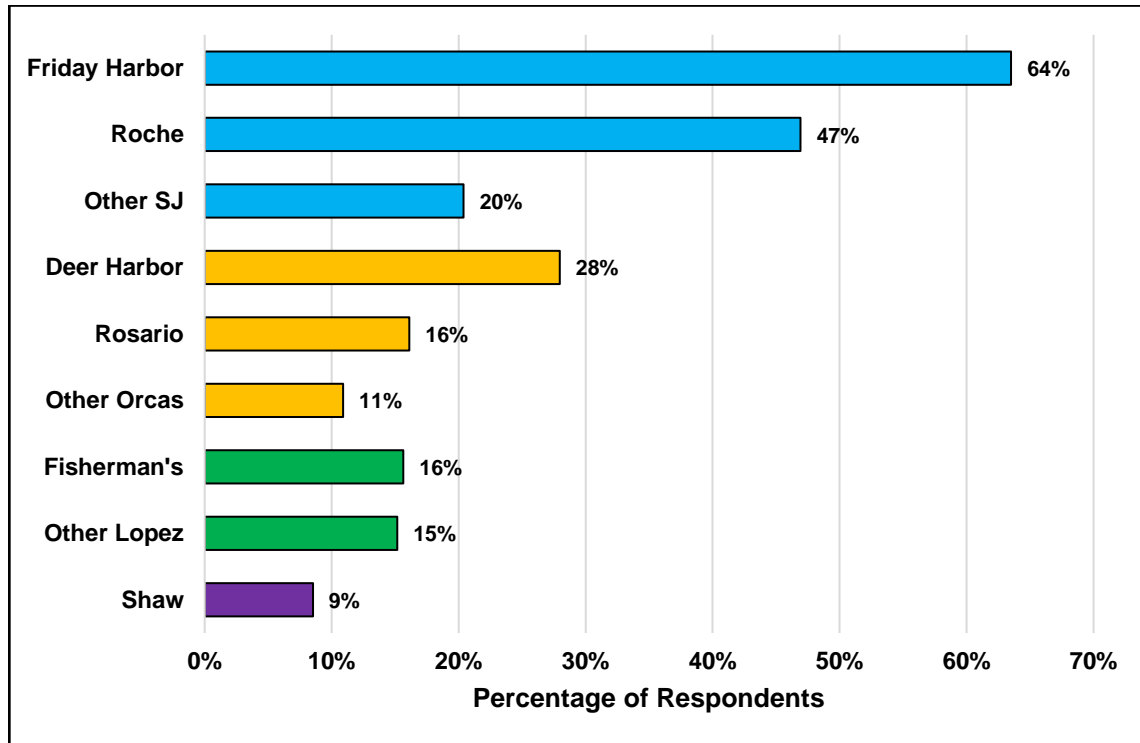
Figure 2. Length of boating trips.

- Most visiting boaters (62%) report trips of a week or less, with 4 to 7 days the most common response.
- However, 20% take trips between 8 and 14 days, with 18% over 14 days (often part of a longer cruise).
- About 7% report day trips.

## Main island locations

What “main island” locations will you visit on this trip? *(Check all that apply)*

<input type="checkbox"/> Friday Harbor, San Juan	<input type="checkbox"/> Deer Harbor, Orcas	<input type="checkbox"/> Any areas on Shaw Island
<input type="checkbox"/> Roche Harbor, San Juan	<input type="checkbox"/> Rosario, Orcas	<input type="checkbox"/> Fisherman’s Bay on Lopez _____
<input type="checkbox"/> Other areas on San Juan	<input type="checkbox"/> Other areas on Orcas	<input type="checkbox"/> Other areas on Lopez Island _____
<input type="checkbox"/> Other – please specify:		



**Figure 3. Main Island locations visited.**

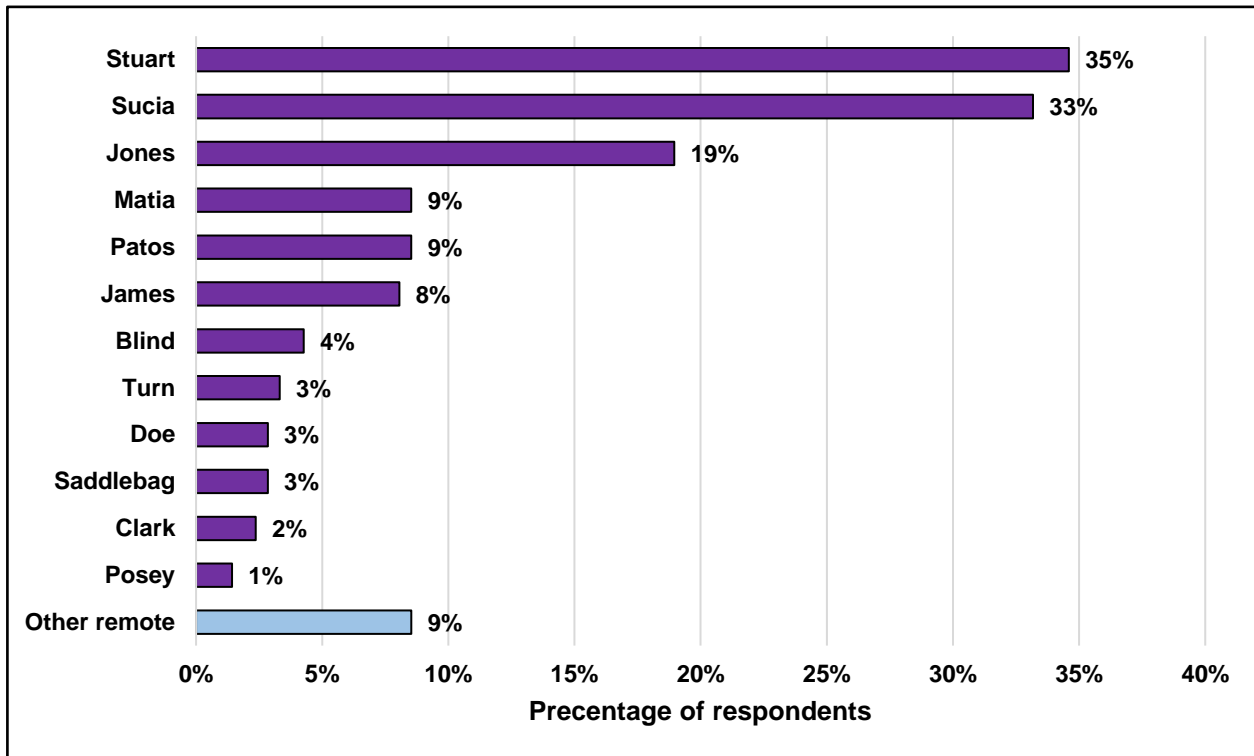
Totals sum greater than 100% because boaters reported any that apply

- The only location visited by most boaters was Friday Harbor (64%), although 47% visited Roche Harbor, and 20% other San Juan Island locations.
- Deer Harbor (28%) and Rosario (16%) were the most common Orcas Island locations, with 11% other Orcas locations (e.g., West Sound, Olga).
- 16% visit Fisherman’s Bay on Lopez, with 15% other Lopez locations (e.g. Spencer Spit, Mackey Harbor).
- 9% visit Shaw Island.

## Remote island locations

What remote island(s) in the San Juan Islands will you visit on this trip? *(Check all that apply)*

<input type="checkbox"/> Patos Island	<input type="checkbox"/> Matia Island	<input type="checkbox"/> Blind Island	Other – please specify:
<input type="checkbox"/> Stuart Island	<input type="checkbox"/> Clark Island	<input type="checkbox"/> James Island	_____
<input type="checkbox"/> Posey Island	<input type="checkbox"/> Saddlebag Island	<input type="checkbox"/> Turn Island	_____
<input type="checkbox"/> Sucia Island	<input type="checkbox"/> Doe Island	<input type="checkbox"/> Jones Island	_____



**Figure 4. Remote islands visited.**

Totals sum greater than 100% because boaters reported any that apply

- The most-visited remote islands were Stuart (35%), Sucia (33%), and Jones (19%); no other island was visited by more than 10%.
- Islands reported in the “other” category included Cypress (3), Waldron, John’s, Center, Henry, Pearl, and several in Canada.



## Nights on trip at main islands, remote islands, and outside San Juans

**On this trip**, about how many nights (total) will you spend in each of the following locations?  
 \_\_\_\_\_ nights docked / moored / anchored on or near the four **main** islands (San Juan, Orcas, Shaw, and Lopez)  
 \_\_\_\_\_ nights camping on or docked / moored / anchored near **remote** islands  
 \_\_\_\_\_ nights docked / moored / anchored at locations **outside** the San Juan Islands  
 It is difficult to count -- I'm on a multi-week (or longer) cruise  
 None -- I'm only boating for the day

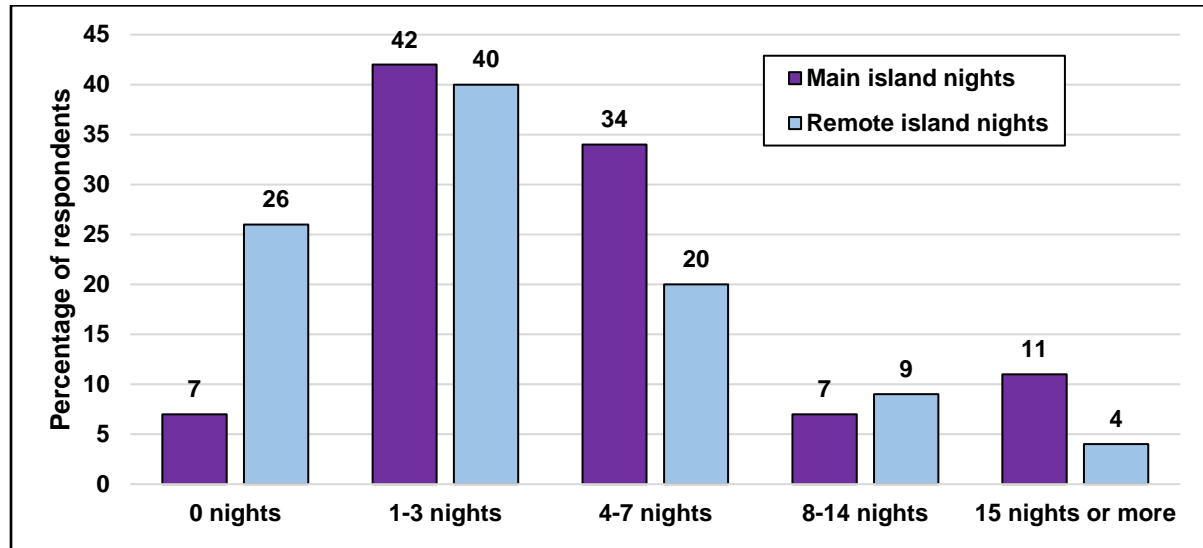


Figure 5. Nights on main and remote islands.

- For this trip, boaters reported a median of 4 nights on main islands, 4 nights on remote islands, and 2 nights outside the San Juans.
- Averages, which were skewed by high numbers from longer trips, were 8 nights on main islands, 4 nights on remote islands, and 9 nights outside the San Juans.
- About 7% spend no nights on main islands, and 26% no nights on remote islands. Short distances among many islands in the archipelago easily allow day trips.
- **Most boaters spend multiple nights on both main and remote islands**, but with slightly more nights at main island locations.

## Home port

What is your “home port” city and state / province? Please list your hailing port if your boat is registered with USCG, the place where you moor / dock your boat if registered with a state / province, or your residence city and state if you launch with a trailer.

City: \_\_\_\_\_ State / province: \_\_\_\_\_

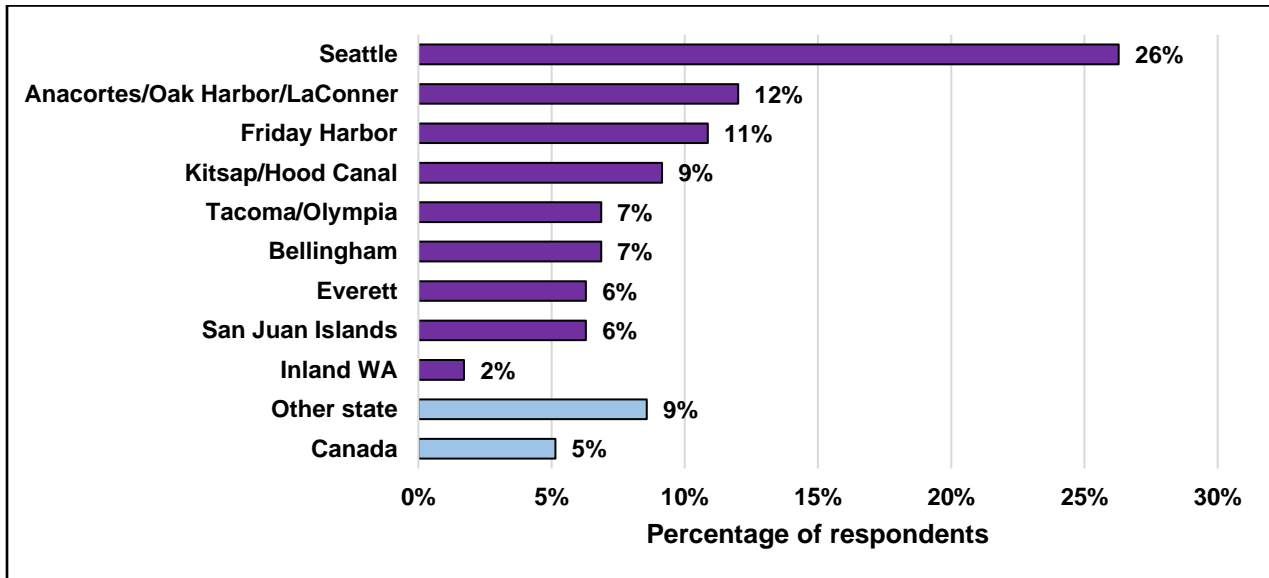


Figure 6. Home ports.

- Most register their boats in Washington State (collectively 87%), with only 9% from other states and 5% from Canada (all BC).
- Within Washington, the highest percentages were from Seattle area locations (26%) and Anacortes/Whidbey/La Conner (12%). There were 6-9% each from other Puget Sound locations, including Kitsap County/Hood Canal, Tacoma/Olympia, Bellingham, and Everett.
- Other state homeports were mostly in Oregon and California (although the sample included boats registered in Alaska, Idaho, Montana, Hawaii, and Arizona).
- 11% of the sample identified Friday Harbor as their home port, with another 6% reporting other locations in the San Juan Islands. Some of these may be San Juan Island residents (suggested by earlier questions about where they spent their last night), although marina harbor masters report that several people moor boats in the islands but live elsewhere.

## Boating experience

About how many years have you been boating in the San Juan Islands? \_\_\_\_\_ years

About how many days do you spend boating in the San Juan Islands each year? \_\_\_\_\_ days per year

**Table 6. Boating experience**

Years boating		Days per year	
Average	24.0	Average	34.0
Median	15.0	Median	14.0
Percent		Percent	
2 or less	13	7 or less	17
3 to 9	20	8 to 14	32
10 to 19	17	15 to 30	29
20 to 29	21	31 to 100	16
30 or more	29	Over 100	6

- Most boaters have considerable experience in the San Juans, with 67% reporting over 10 years, 29% over 30, and only 13% two years or less. The median was 15 years, average was 24 (increased by high outliers).
- Many report boating up to 14 days per year in the San Juans (49% total). About 16% report 31-100 days, with 6% over 100. The median was 14 days, but outliers raise the average to 34.

## Residence on the islands

Do you have a residence on the San Juan Islands (not including your boat)

No  Yes

- 19% of the sample have a residence on the San Juan Islands.
- Among those who have a residence, 65% live in the San Juans year-round, with 15% reporting 9 to 11 months (80% total). These respondents were from the email invitation sample; the on-site sampling protocol filtered out residents.

## On-shore activities

Please check all the activities you have done (or probably will do) on the San Juan Islands on this trip.

- Hike or walk on a beach or marine shore area
- Hike or walk in a forested or mountain area
- Walk in a village
- Eat / drink in a restaurant or bar
- Shop for groceries or supplies in a village
- Shop for arts, crafts, etc.
- Rent, borrow, or use your own sea kayak or paddle board (if you are traveling on a larger vessel)
- Rent, borrow, or use your own bicycle
- Rent, borrow, or use your own vehicle
- Other — please specify: \_\_\_\_\_

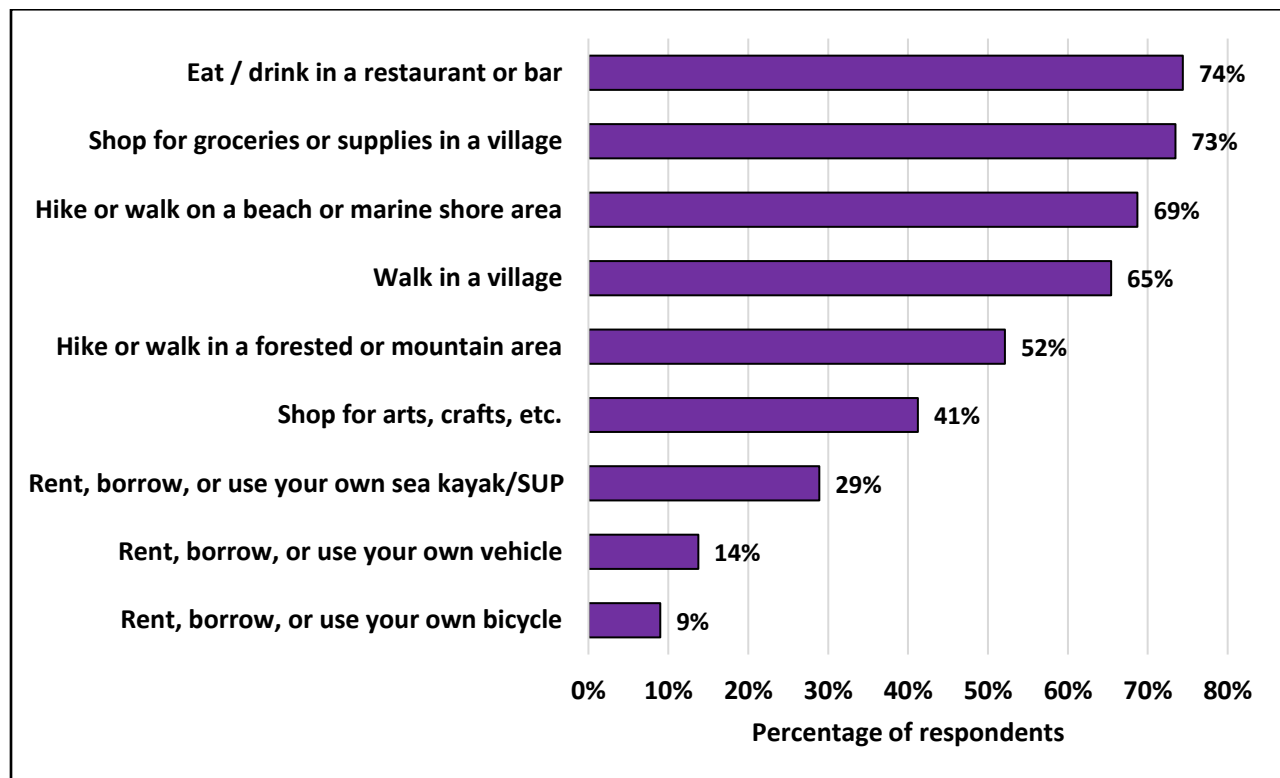


Figure 7. On-shore activities.

- Most boaters report several onshore activities, including visiting local restaurants/bars (74%), buying groceries or supplies (73%), hiking on beaches or marine shores (69%), walking in villages (65%), or walking in a forested / mountain area (52%).
- Fewer report shopping for arts and crafts (41%) or kayaking / board paddling (29%).
- Few report renting / using a vehicle (14%) or bicycle (9%).

## Reasons for boating in the islands

People enjoy boating in the San Juan Islands for many reasons; please rate the following for you. (*Circle one number for each row.*)

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
The relaxed pace of life – being on “island time”	0	1	2	3	4
Good choice of hotels, inns, B&Bs, or house rentals	0	1	2	3	4
Good choice of places to dock, moor, or anchor	0	1	2	3	4
Good opportunities for boating, sailing, or kayaking	0	1	2	3	4
Local stores and restaurants	0	1	2	3	4
Local arts and crafts	0	1	2	3	4
Local foods	0	1	2	3	4
Friendliness of residents	0	1	2	3	4
Lively village scene	0	1	2	3	4
Cultural history of the islands	0	1	2	3	4
Natural / rural scenery	0	1	2	3	4
Beach / shore / bluff / headlands hiking	0	1	2	3	4
Forest / mountain hiking	0	1	2	3	4
Marine wildlife viewing	0	1	2	3	4
Good weather / sea conditions for boating	0	1	2	3	4
Biking on rural roads	0	1	2	3	4
Agreeable climate	0	1	2	3	4
Others (please list)					

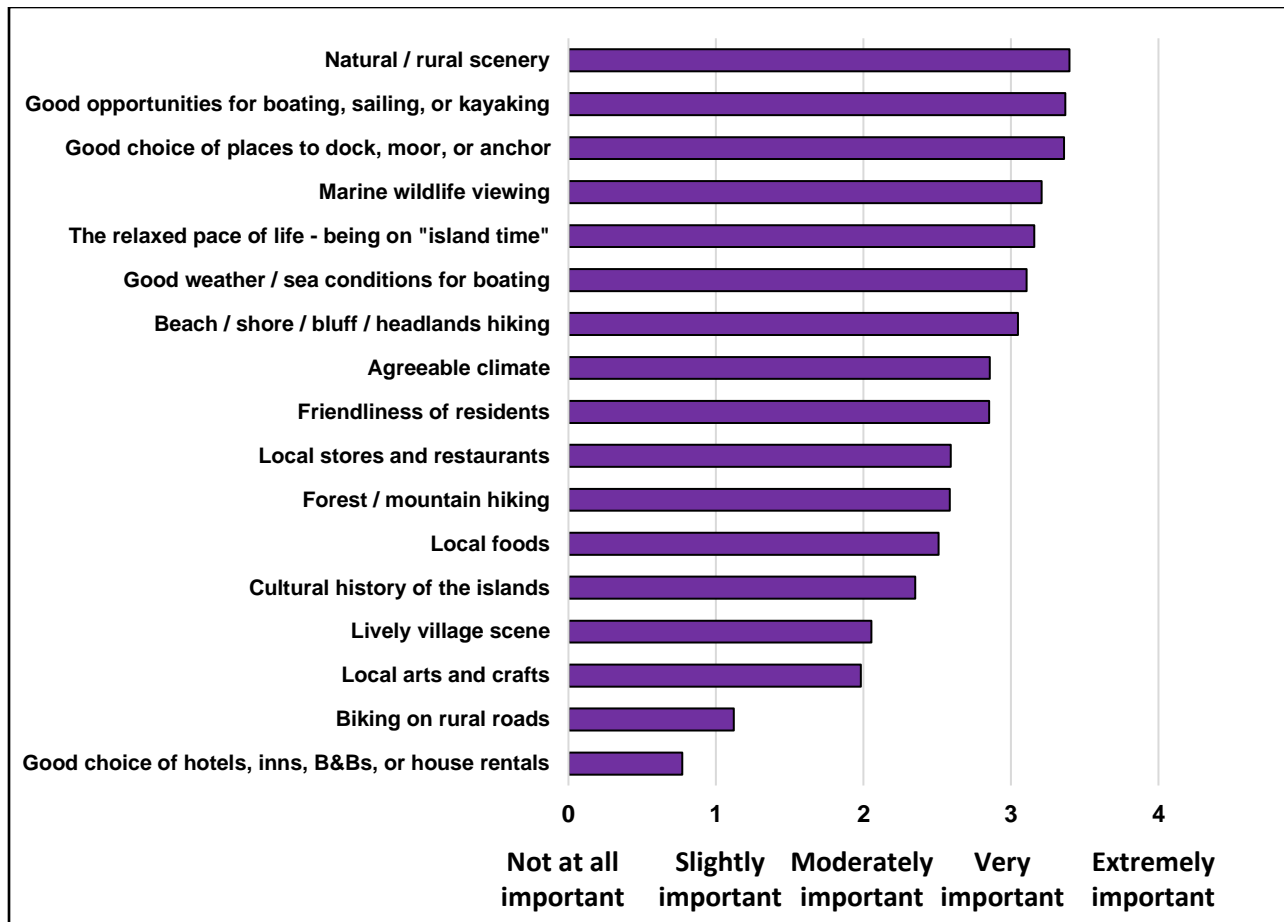


Figure 8. Reasons for boating in the San Juan Islands.

- Similar to 2017 visitors and 2019 residents and businesses, boaters visit the San Juan Islands for reasons related to natural resources (including natural and rural scenery, marine wildlife viewing).
- Three reasons specific to boating are near the top of the list: “good opportunities for boating, sailing, or kayaking;” “good choice of places to dock, moor, or anchor;” and “good weather / sea conditions for boating.”
- The relaxed pace and friendliness of residents were important social characteristics.
- Local stores/restaurants and local foods were further down the list, followed by a lively village scene and local arts and crafts. Good accommodations were at the bottom, probably because most boaters stay on their boats.
- Differences between all-island boaters and 2017 visitors were generally small. However, boaters rated biking and accommodations lower (probably because they don’t carry bikes, and they stay overnight on their boats).
- There were no substantive differences between all-island boaters and residents or 2017 visitors.

## Crowding

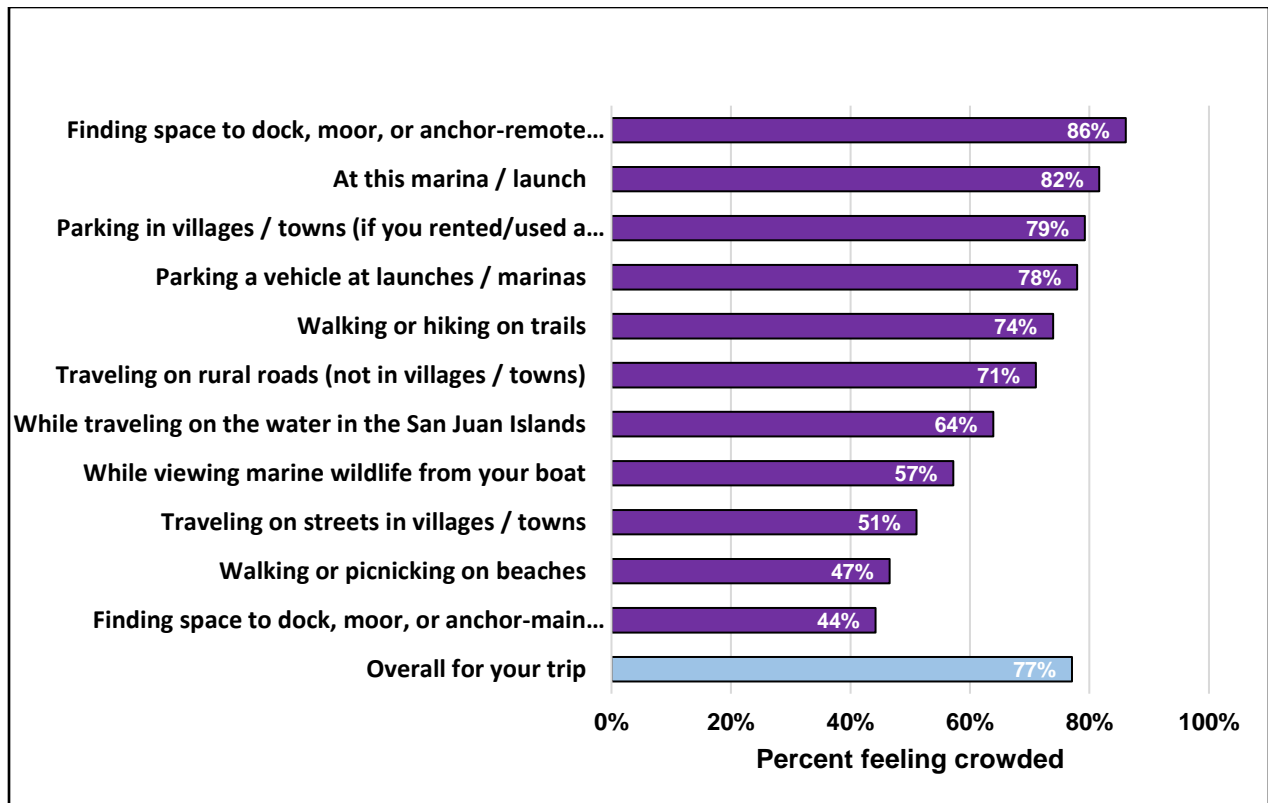
As discussed in previous reports for the San Juan Islands, researchers recognize a difference between use density and crowding (Shelby and Heberlein 1986; Shelby et al., 1989). **Density** is a descriptive term that refers to the number of people per unit area (and it can be determined objectively). **Crowding** is a negative evaluation of density; it involves a value judgment that a particular number is too many. The term **perceived crowding** is used to emphasize the evaluative nature of the concept.

How crowded did you feel during your trip in the San Juan Islands (so far)? (Please circle one number for each row; if you didn't do an activity, leave that row blank)									
	Not at all crowded		Slightly crowded		Moderately crowded		Extremely crowded		
At this marina / launch	1	2	3	4	5	6	7	8	9
While traveling on the water in the San Juan Islands	1	2	3	4	5	6	7	8	9
While viewing marine wildlife from your boat	1	2	3	4	5	6	7	8	9
While finding space to dock, moor, or anchor near four main islands (SJ, Orcas, Shaw, and Lopez)	1	2	3	4	5	6	7	8	9
While finding space to dock, moor, or anchor near remote islands	1	2	3	4	5	6	7	8	9
Parking in villages / towns (if you rented/used a vehicle)	1	2	3	4	5	6	7	8	9
Parking a vehicle at launches / marinas	1	2	3	4	5	6	7	8	9
Traveling on streets in villages / towns	1	2	3	4	5	6	7	8	9
Traveling on rural roads ( <b>not</b> in villages / towns)	1	2	3	4	5	6	7	8	9
Walking or hiking on trails	1	2	3	4	5	6	7	8	9
Walking or picnicking on beaches	1	2	3	4	5	6	7	8	9
Overall for your trip	1	2	3	4	5	6	7	8	9

Results can be analyzed in several ways. The traditional analysis collapses the scale into two categories. This provides a conceptually meaningful break point between those who labeled the situation as “not at all crowded” (scale points 1 and 2, a positive evaluation), and those who labeled the situation as slightly, moderately, or extremely crowded (scale points 3 through 9, a negative evaluation).

This single indicator (***the percent feeling crowded, or crowding rating***) can be easily compared among different places, times, groups, or contexts in the San Juan Islands, as well as to other locations where the indicator has been measured (over 200 studies and several hundred locations or resource contexts since 1977).

The figures below compare crowding ***scores from the all-islands boater survey***. An appendix to Part III of this report compiles these and other crowding ***scores from all the San Juan Island visitor, resident, and business surveys*** conducted since 2017. This allows ***comparisons across groups, places, contexts, and other similar resources***.



**Figure 9. Visiting boaters' crowding ratings for different settings.**

- The highest crowding ratings are for “dock/moor/anchor on remote islands” (86%), and while at the marina where boaters were surveyed (82%; mostly Friday Harbor and Roche Harbor). These ratings were much higher than for finding space to dock/moor/anchor on the main islands (44%).
- Crowding ratings for parking in villages and at launches/marinas are higher than for walking/traveling on trails, roads, or water, and distinctly higher than for marine wildlife viewing from boats, traveling on streets in villages, and walking on beaches.



## Evaluating Tourism

### General opinions about San Juan Islands tourism issues

Visiting boaters were asked whether they agreed or disagreed with eight statements about tourism in the San Juan Islands (wording shown below). The statements represented a range of positive, negative, and more neutral evaluations commonly discussed in the community, presented in an alternating order.

Responses were on a 5-point Likert-type scale, from strongly disagree to strongly agree with a neutral category. Figure 10 shows percent agree and disagree (neutral responses are 100 minus the sum of other responses), ordered from greatest to least agreement based on averages.

Please tell us whether you agree or disagree with the following statements about tourism in the San Juan Islands.

Statement	Strongly disagree	Slightly disagree	Neither agree nor disagree	Slightly agree	Strongly agree
Tourism has improved the economic living standard of the islands.	-2	-1	0	1	2
Crowding is reducing the quality of recreation experiences on or around the islands.	-2	-1	0	1	2
If it helps the local economy grow, it is acceptable if tourism changes some aspects of life in the San Juan Islands.	-2	-1	0	1	2
Tourism generally supports more community amenities (such as marinas, docks, moorings, restaurants, shopping, festivals, and cultural activities) than residents could alone.	-2	-1	0	1	2
Increased vacation rentals have reduced the affordability of long-term housing rentals.	-2	-1	0	1	2
I'm generally irritated by the level of tourism in the islands.	-2	-1	0	1	2
The current level of impact from tourism is acceptable to me.	-2	-1	0	1	2
Tourism has had a negative impact on the natural environment on or around the islands.	-2	-1	0	1	2

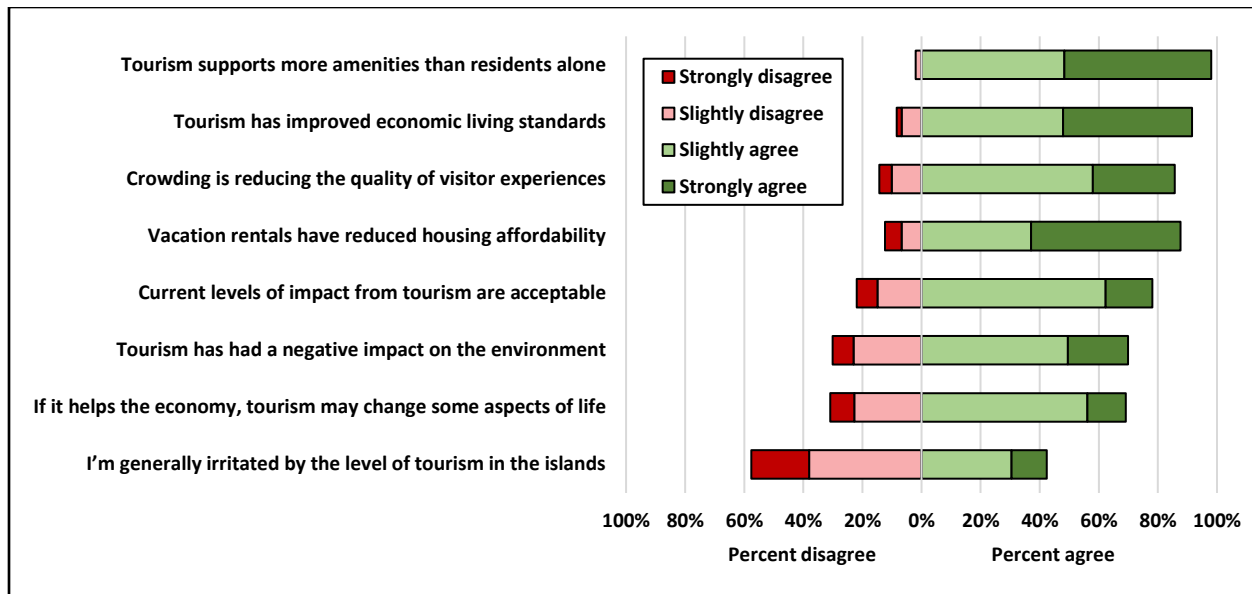


Figure 10. Boaters' general opinions about tourism issues.

- The greatest agreement was that tourism supports more amenities than residents alone (89%), and improves living standards (92%).
- On the other hand, majorities of boaters recognize that crowding is reducing the quality of visitor experiences (86%) and creating negative impacts on the environment (70%).
- Boaters also agree that vacation rentals may reduce housing affordability (88%).
- In spite of these negative impacts, majorities agree that “current levels of tourism impact are acceptable” (78%) and “if it helps the economy, it’s OK if tourism changes some aspects of life” (69%). In addition, 58% **disagreed** with the statement “I’m generally irritated by the level of tourism in the islands.”
- Compared to residents, all-island boaters were generally more likely to cite the benefits of tourism and less concerned about negative impacts. Boaters’ needs are largely served by tourist services, so these opinions make sense. Visitors in 2017 were not asked this question.

## Overall capacity evaluations

In general, do you think visitation to the San Juan Islands in summer months is **under capacity**, **at capacity**, or **over capacity**?

- Under capacity (the islands can handle more tourists).
- At capacity (there is a good balance between the number of visitors and the ability to handle them).
- Over capacity (the number of visitors is reducing the quality of life for residents or experiences for visitors).

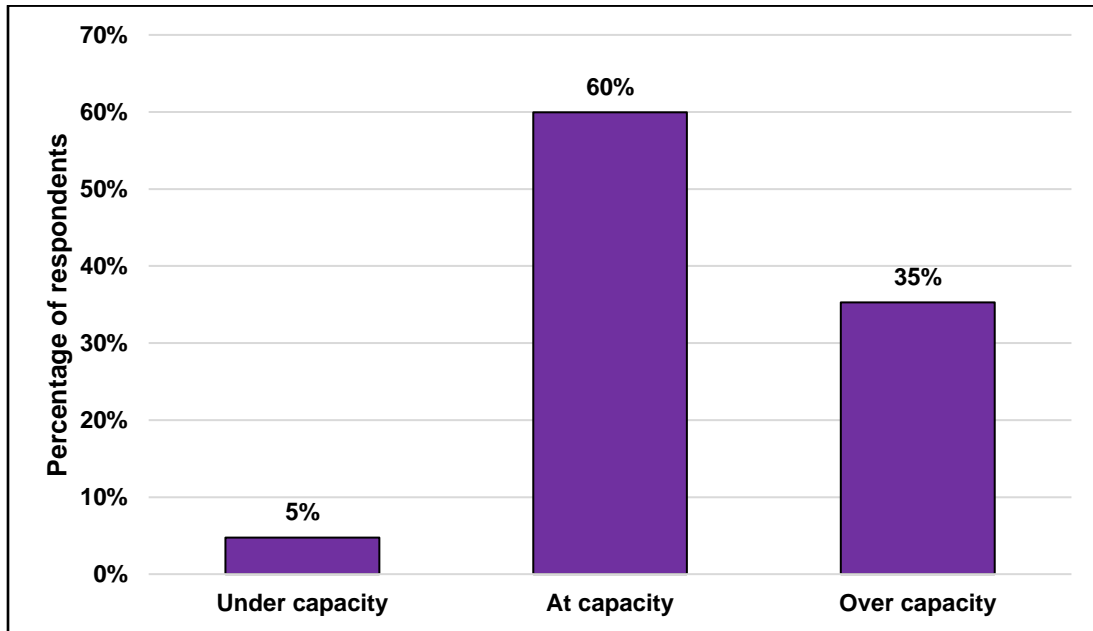


Figure 11. Capacity evaluations.

- Most boaters indicate the San Juan Islands are at capacity (60%) or over capacity (35%) during summer months (95% taken together). Only 5% say the San Juans are “under capacity, we can handle more tourists.”
- Results are generally in-between businesses and residents. Visitors in 2017 were not asked this question.

## Support for limits on visitor numbers

Over the long-term, visitation to the San Juan Islands has increased about 3 percent per year, which means visitor numbers would double in about 25 years. If visitation continues to increase, would you support measures to limit the number of visitors?

- Never
- Maybe
- Yes, limits on the number of visitors will eventually be needed.

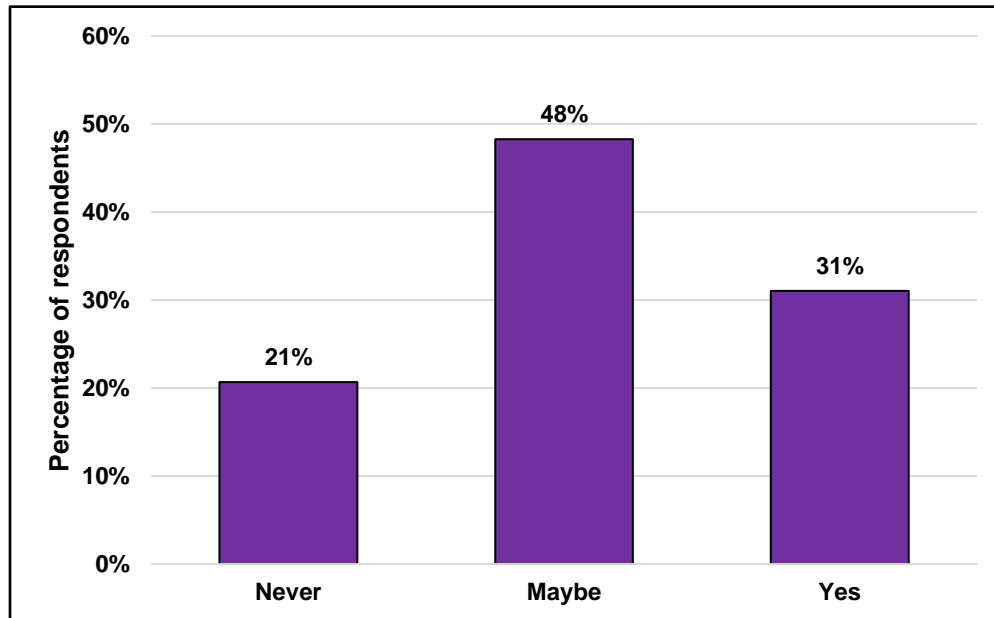


Figure 12. Support for limits on visitor numbers.

- 31% of boaters said “yes,” they would support measures to limit the number of visitors if visitation continues to increase, while 48% said “maybe.” Taken together, 79% of residents are not opposed to limits, vs. 21% who said they would “never” support limits.
- Boater support for limits is similar to businesses (where 34% said “yes” and 41% “maybe,” 75% taken together). Among residents, 50% said “yes” and 35% “maybe” (85% together). Visitors in 2017 were not asked this question.

## Appropriate levels of public land

About 16% of San Juan County is public land; other counties in the State of Washington average about 57%. In general, do you think San Juan County has too little, too much, or about the right amount of public land?

- Too little public land
- About the right amount of public land
- Too much public land

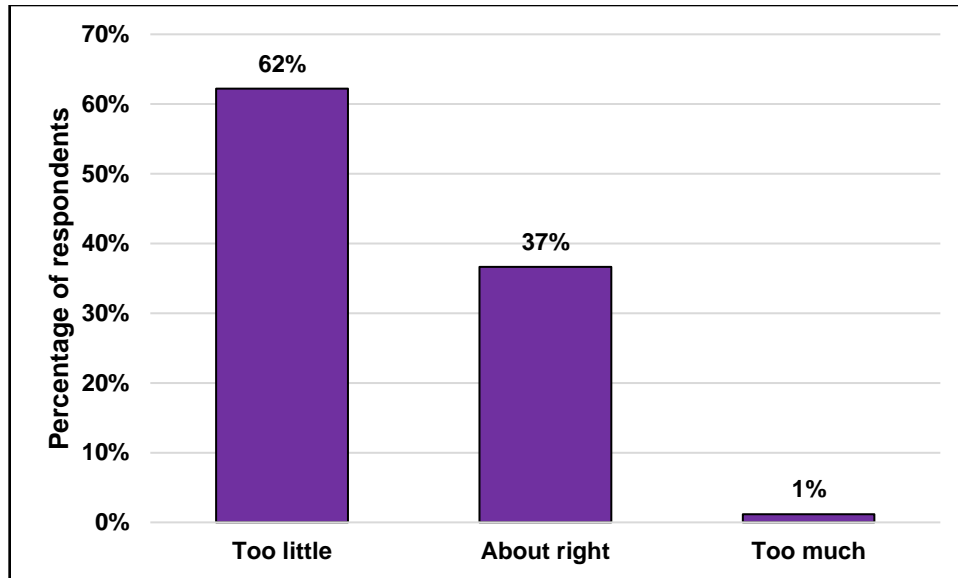


Figure 13. Appropriate levels of public land.

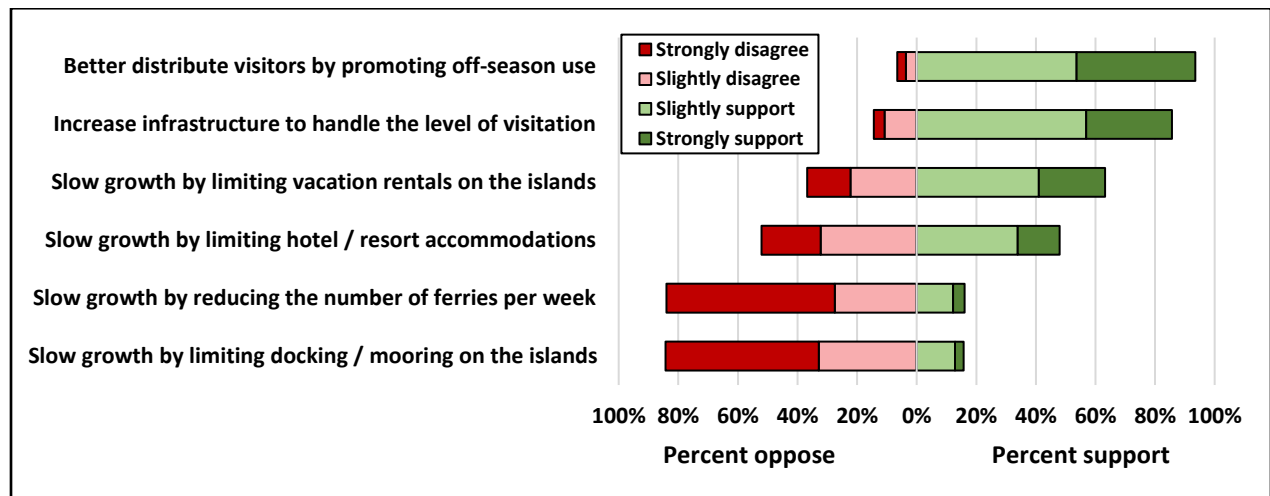
- Most visiting boaters (62%) say San Juan County has “too little” public land, and 37% say “about right.” Only 1% say “too much.”
- More boaters (62%) than residents and businesses (54 to 55%) report there is too little public land (visitors in 2017 were not asked this question).

## Evaluating approaches or actions to address problems

### Support for sustainable tourism approaches

If visitor numbers were to approach capacity, do you support or oppose making tourism more sustainable in the following ways?

	Strongly oppose	Slightly oppose	No opinion	Slightly support	Strongly support
Better distribute visitors by promoting off-season use.	-2	-1	0	1	2
Increase infrastructure to handle the level of visitation.	-2	-1	0	1	2
Slow growth by limiting vacation rentals on the islands.	-2	-1	0	1	2
Slow growth by limiting hotel / resort accommodations on the islands.	-2	-1	0	1	2
Slow growth by limiting docking / mooring on the islands.	-2	-1	0	1	2
Slow growth by reducing the number of ferries per week.	-2	-1	0	1	2



**Figure 14. Support for sustainable tourism approaches (detailed results).**

- Boaters are similar to residents and businesses in near-unanimous support (94%) for better distributing visitation by promoting off-season use.
- They also supported increased infrastructure to handle the level of visitation (86%); this was more similar to businesses (66% support) than residents (47% support).
- Boaters supported slowing growth by limiting vacation rentals (63%), but were divided over limiting hotel / resort accommodations (48% support; 52% oppose).
- Like residents and businesses, boaters strongly oppose (83%) slowing growth by reducing ferries. Boaters also strongly opposed (84%) limiting docking / mooring on the islands, an approach that would clearly affect their own visits.

## Support for and prioritizing specific management actions

Please tell us if you support or oppose the following actions that might be used to improve tourism in the San Juans. If you support an action, identify whether it should be a low, medium, or high priority. (Circle one number per row).

Management action	Strongly oppose	Slightly oppose	No opinion	<i>I support this &amp; it should be a...</i>		
				Low priority	Medium priority	High priority
Increase parking in towns / villages.	-2	-1	0	+1	+2	+3
Develop more parking at attraction sites.	-2	-1	0	+1	+2	+3
Improve traffic flow through villages during “ferry rushes.”	-2	-1	0	+1	+2	+3
Encourage visitors to “leave their cars on the mainland.”	-2	-1	0	+1	+2	+3
Subsidize alternative travel (buses, trolleys, vans, or bike sharing) to reduce traffic congestion on the islands.	-2	-1	0	+1	+2	+3
Develop separated bicycle paths on high-use roads.	-2	-1	0	+1	+2	+3
Widen and add bicycle lanes on high-use roads.	-2	-1	0	+1	+2	+3
Education about car-bike etiquette to reduce traffic conflicts.	-2	-1	0	+1	+2	+3
Education and enforcement about dog-walking etiquette.	-2	-1	0	+1	+2	+3
Increase education about boating etiquette to reduce impacts when viewing wildlife.	-2	-1	0	+1	+2	+3
Increase education about docking / mooring etiquette to reduce crowding near marinas and popular anchorages.	-2	-1	0	+1	+2	+3
Provide information about less-used areas to spread out use.	-2	-1	0	+1	+2	+3
Acquire more public beach / bluff / headland properties.	-2	-1	0	+1	+2	+3
Acquire more public forest / mountain properties.	-2	-1	0	+1	+2	+3
Manage number / timing of commercial kayaking groups.	-2	-1	0	+1	+2	+3
Manage number / timing of commercial wildlife viewing boats.	-2	-1	0	+1	+2	+3
Increase docking / mooring near marinas on four main islands.	-2	-1	0	+1	+2	+3
Increase docking / mooring on remote islands.	-2	-1	0	+1	+2	+3
Reduce tourism promotion.	-2	-1	0	+1	+2	+3
Develop more exhibits at attraction sites.	-2	-1	0	+1	+2	+3
Develop off-road trails for pedestrian, bike, and horse use	-2	-1	0	+1	+2	+3

Other (please list)

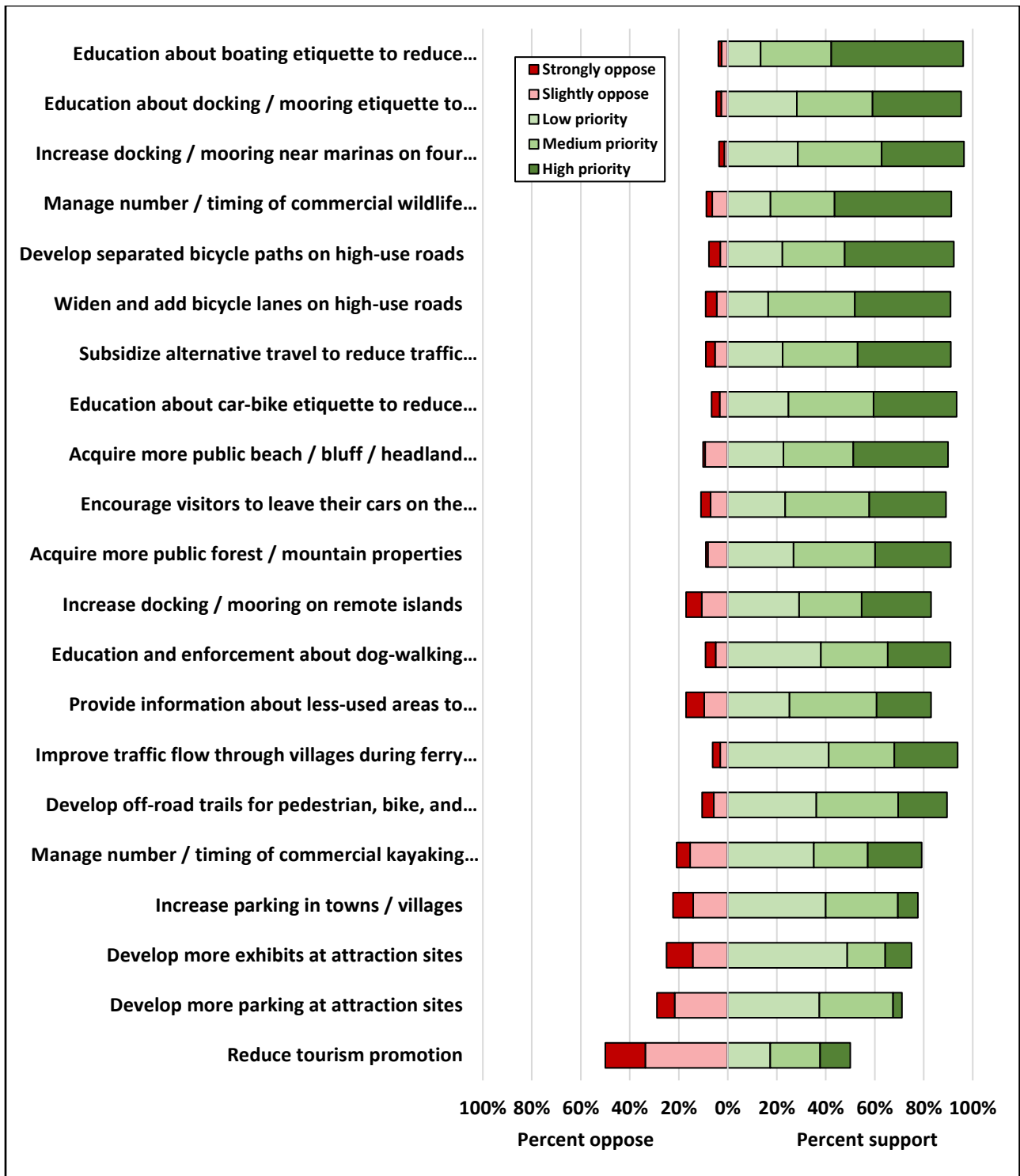


Figure 16. Boaters' opinions about specific management actions (detailed results).  
Ranked by mean score.



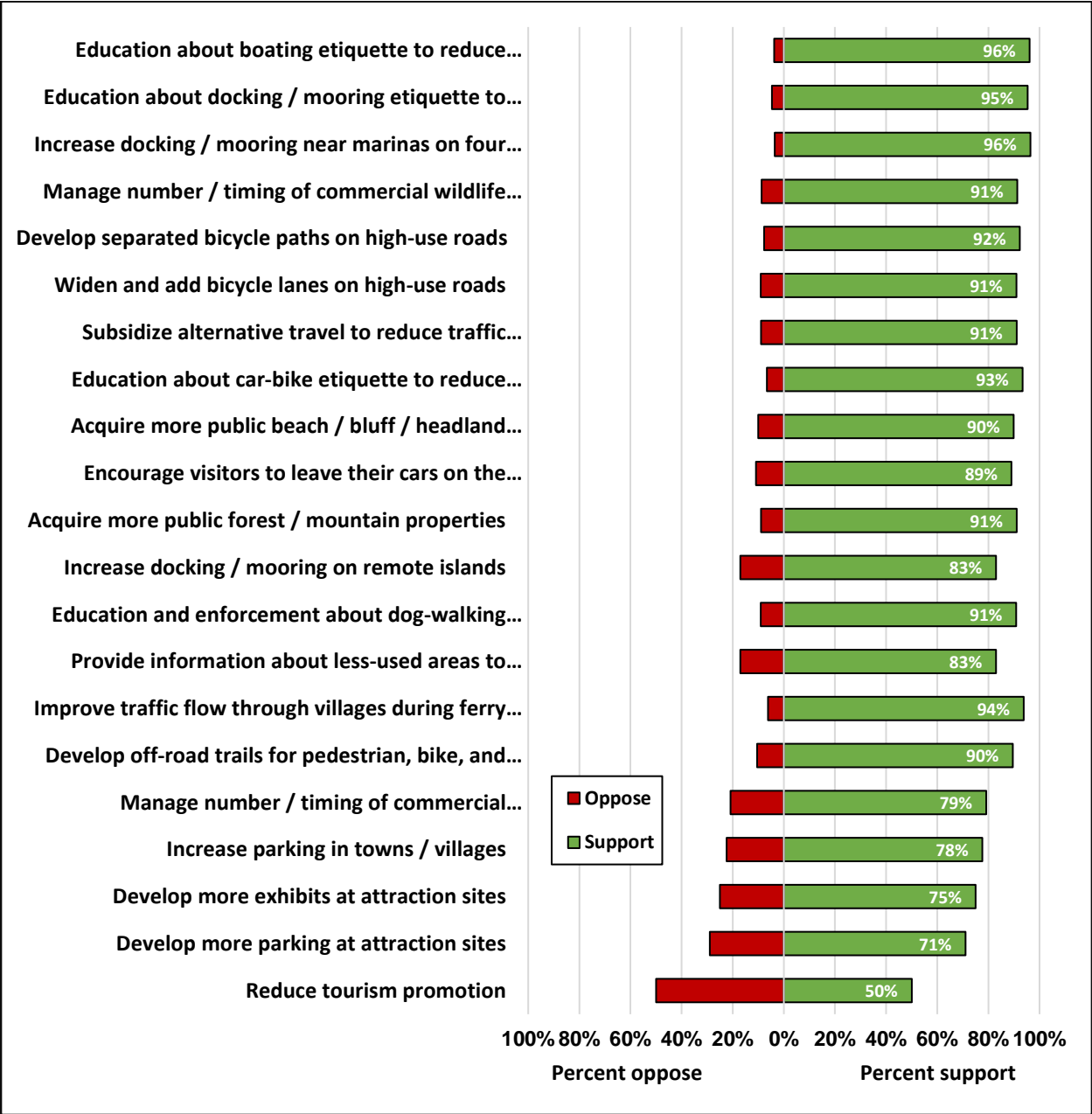


Figure 17. Boaters’ opinions about specific management actions (summary of support/oppose only).  
 Ranked by mean score.

- Boaters showed majority support for 20 of the 21 management actions, with split opinions about one (reduce tourism promotion).
- The highest priority actions were 1) etiquette education for viewing marine wildlife, 2) etiquette education for docking and mooring; and 3) increasing docking and mooring near the four main islands. The support for etiquette regarding marine wildlife probably reflects highly publicized whale-watching issues (see separate section below).
- Similar to results from the 2017 visitor and 2019 resident/business surveys, all-island boaters showed majority support for 1) several biking infrastructure and management actions; 2) addressing village congestion and parking; and 3) acquiring more public land.

## Boating use around Southern Resident orcas

The State of Washington recently passed a new law regarding vessel use to protect Southern Resident orca whales. Please tell us whether you agree or disagree with the following statements about boating use around orca whales.

Statement	Strongly disagree	Slightly disagree	Neither agree nor disagree	Slightly agree	Strongly agree
I understand the new regulations and how they affect the way I operate my boat near Southern Resident orcas.	-2	-1	0	1	2
I find some regulations confusing (for example, because they are new, or different from Canadian regulations).	-2	-1	0	1	2
I am uncertain about judging distances well enough to comply with the new regulations (stay 300 yards to the side of whales, 400 yards in front of or behind whales, slow to 7 knots within a half mile of whales).	-2	-1	0	1	2
I would support additional regulations to turn off fish / depth sounders within a half mile of Southern Resident orcas.	-2	-1	0	1	2
I would support additional regulations to create some “no-go zones” (no vessels allowed) where Southern Resident orcas feed regularly.	-2	-1	0	1	2
I would support additional regulations managing the number and practices of whale-watching vessels to minimize their impacts on Southern Resident orcas.	-2	-1	0	1	2

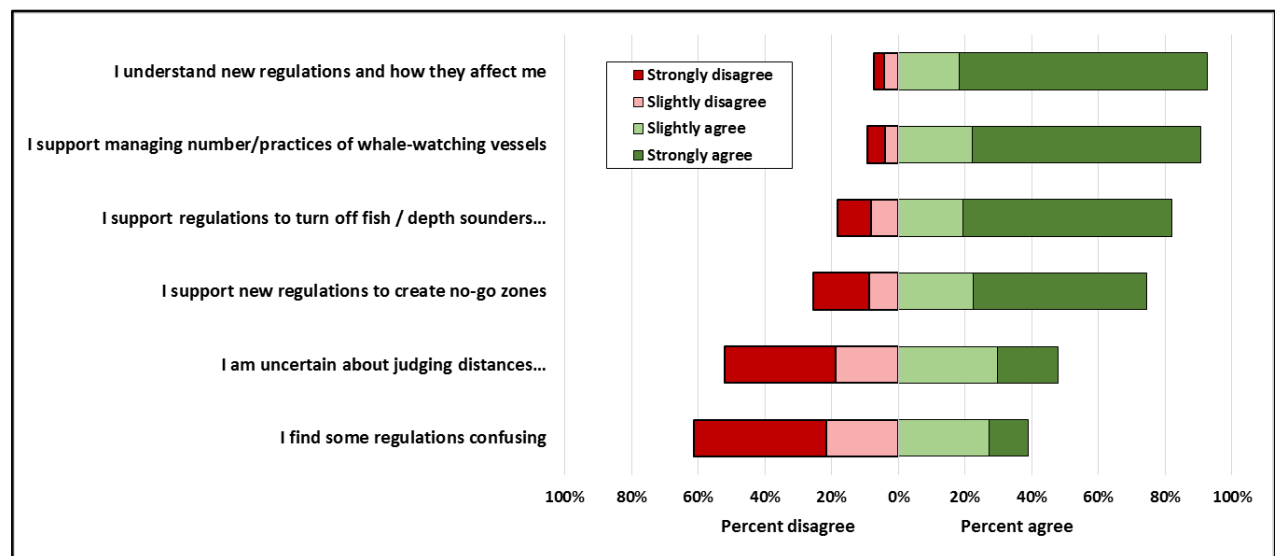


Figure 18. Boaters' opinions about whale watching management issues.

- Nearly all boaters (94%) report that they understand the new whale-watching regulations and how they affect them. Similarly, 91% support additional regulations to manage the number and practices of whale-watching vessels to minimize their impacts on orcas. Taken together, results show support for recent legislative and policy decisions to increase management of boating around orcas.
- There is majority support for additional regulations to 1) turn off fish / depth sounders (82% agree) or 2) create some no-go zones where orcas feed (75% agree). While support might vary depending on the details of specific regulations (e.g., distances for turning off electronics, specific locations and times for no-go zones), results suggest boaters are willing to change their own uses to reduce impacts on whales.
- Substantial numbers of boaters agree that they are “uncertain about judging distances well enough to comply with the new regulations” (48% agree), or that new regulations can be “confusing” (39% agree). This suggests additional work may be needed to help boaters understand and comply with regulations.