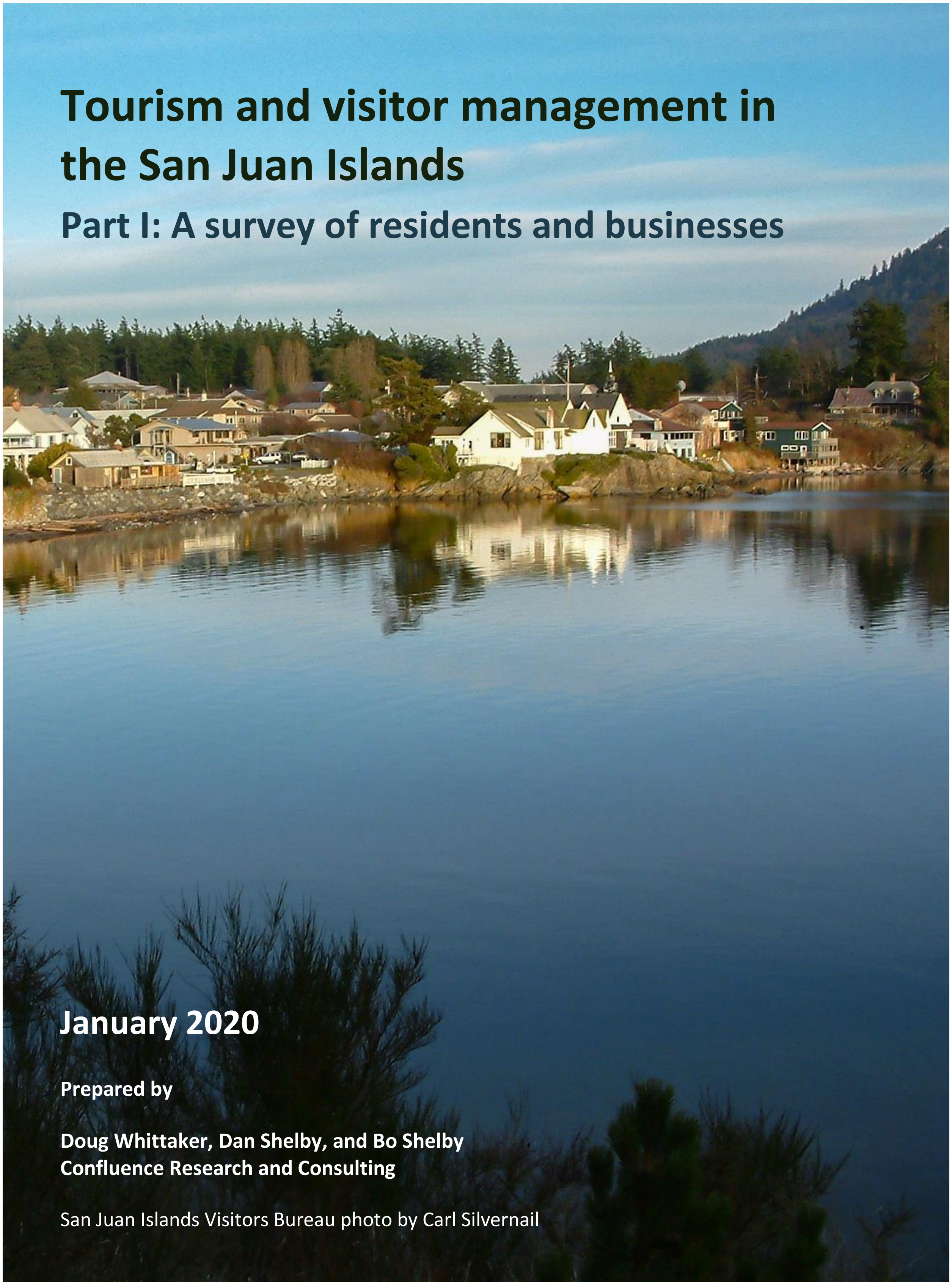

Tourism and visitor management in the San Juan Islands

Part I: A survey of residents and businesses

January 2020

Prepared by

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Confluence Research and Consulting

San Juan Islands Visitors Bureau photo by Carl Silvernail

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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 visitor surveys in 2017, ***stakeholders requested comparable data representing residents/businesses, all-island boaters, and remote island boaters.*** This report covers the ***resident survey*** and ***business survey***.

Methods

Residents. A representative sample of adults who live or work in San Juan County was developed from voter registration rolls. Over 2,000 postal invitations and reminders were sent out in summer 2019. The final sample included ***829 residents (42% response rate),*** which exceeded response rates for the SJC Parks, Trails, and Natural Areas surveys in 2009 and 2016.

Businesses. Email invitations and reminders were sent to every business registered with the San Juan County Visitor Bureau and the San Juan, Orcas, and Lopez Chambers of Commerce. The business survey was completed by ***319 businesses (57% response rate)*** which is a very high response rate for any public survey.

Highlight findings

Profile of residents. The sample had, on average, a residency length of 21 years and live on the islands 11.1 months per year. 54% report full or part-time work. Among those who work, 79% do so on the same island where they live and 24% work in tourism.

Vacation rental owners. Most residents do not offer their homes as vacation rentals (93%). But some might do so in the future (28%) if regulations, their living situation, or potential revenue changed. About 5% are considering this now.

Boat ownership. Most residents report owning a boat (56%), with 27% powerboats, 26% kayaks, 10% sailboats, and 15% other small craft (SUPs, canoes, or row boats). About half launch their boats from trailers, 31% keep them at a marina, and 17% use private docks.

Profile of businesses. Most respondents live on the island where their business is located. Many businesses serve more than one island. The average business age was 22 years and the oldest was 134 years; 71% of businesses have five or less employees.

About 35% of all businesses get over 75% of revenue from tourism, while 31% get less than 25%. 70% of businesses have connections to tourism, including arts/gifts retail, restaurants, accommodations, guide/outfitter services, and vacation rentals. San Juan Island businesses appear more reliant on tourism revenue.

Reasons for living on the islands. The top reasons are related to natural resources and public land. “Friendliness of residents” and “relaxed pace of life” are also important, more so than a “lively village scene.” Differences among islands and between visitors, residents, and businesses were generally small.

Crowding. The highest crowding ratings are related to parking and traffic. There were few substantive differences between residents and businesses. Findings from the residents and businesses were

distinctly different from 2017 visitors, who reported much lower crowding. The highest crowding ratings among residents and businesses were on San Juan Island.

Traffic and congestion. Majorities report frequent traffic congestion and trouble finding parking in Friday Harbor and Eastsound, vs. 11% of residents and 17% of businesses who report there are "never too many people." The most common way of coping with crowding was choosing a different day or time, followed by going in the off-season, and visiting another location on the islands. Few would consider moving somewhere less crowded.

Evaluating tourism. There was wide acknowledgement among residents that vacation rentals reduce long-term housing affordability. Residents recognize economic benefits from tourism, but also that tourism-related crowding reduces the quality of visitor experiences and has negative impacts on the environment.

A higher percentage of businesses than residents recognized the economic benefits from tourism, but most agreed that vacation rentals reduce affordability of long-term rentals. Businesses were more accepting of impacts from tourism, but recognized that crowding reduces the quality of visitor experiences.

Capacity evaluations. Most residents indicate the San Juan Islands are at (52%) or over (42%) capacity during peak summer season. Only 6% of residents (vs. 20% of businesses) report the San Juans are "under capacity, we can handle more tourists." Half of residents and 34% of businesses support limits on visitor numbers; many others recognize that limits may be needed eventually.

Support for sustainable tourism. Residents and businesses are similar in their support for limiting vacation rentals, and their near-unanimous opposition to reducing ferries. Businesses show more support than residents for promoting the off-season and increasing infrastructure. A majority of businesses oppose limits on hotel accommodations, while over half of residents support this.

Support for specific management actions. Residents showed majority support for 18 of 25 management actions. The highest priority actions included 1) adjustments to the ferry system to favor residents; 2) increased whale-watching management; 3) several biking infrastructure and management actions; 4) addressing village congestion and parking; and 5) acquiring more public land. Residents showed majority opposition to more development and allowing congestion/crowding to increase.

Businesses showed majority support for 17 of 25 management actions. The highest priority actions included 1) several biking infrastructure items; 2) reserving space on ferries for residents; 3) increasing whale-watching management; 4) addressing village congestion and parking; and 5) acquiring more public land. Businesses showed opposition to more development, reducing tourism promotion, limiting visitation to the islands, and allowing congestion/crowding to increase.

The two groups had opposing positions for only one action (reducing tourism promotion, which most residents support while most businesses do not).

Targets for tourism promotion. Majorities of residents wanted to reduce promotion targeting summer visitors and package/tour groups. The only majority support for increased promotion was for off-season visitors.

There was business support for targeting off-season, arts-oriented, farm-oriented, education-oriented, history-oriented, food-oriented, independent, business/conference, and outdoor recreation tourists. Businesses wanted to reduce promotion for package/tour groups and summer visitors.

Ferry use and reservations. Most residents and businesses report one to two round trips per month to Anacortes, with little difference between summer and the rest of the year. About 75% of residents and businesses report making a reservation for every ferry trip. Among those who don't make reservations, the most common reason is an uncertain schedule or lack of available reservations.

Although residents and visitors make reservations at about the same rate, visitors report more success getting reservations for their desired time and date, probably due to a longer planning horizon. These results fit with residents' perceptions that reservations favor visitors.

Table of contents

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, priority 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.
    - ***Onsite 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*** (***this report, Part I***)
- Survey of ***all island boaters (separate report, Part II)***
- Survey of ***remote island boaters (separate report, Part III)***
- ***Conclusions and recommendations*** (***separate report, Part IV***)

The overall goal is to develop information for these important stakeholder groups, ***comparable to the information about main island visitors*** developed through the 2017 onsite and ferry surveys. The information can then be used by individual agencies or cooperating groups of agencies 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. This report presents findings by topic, integrating results from the resident and business surveys rather than treating them serially. This keeps the focus on the survey topics rather than the two different samples. 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 are also included when appropriate.***

- Profiles of the resident and business samples
- Reasons for living/working in the San Juan Islands
- Evaluating tourism conditions and islanders' responses to them
  - Crowding, congestion, parking, and coping/displacement
- 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
  - Preferred targets for tourism promotion
- Ferry use and reservations

Methods

After completion of land-based visitor surveys (including the onsite and ferry surveys) in 2017, ***stakeholders requested comparable data representing residents/businesses, all-island boaters, and remote island boaters.*** This report covers the ***resident survey*** and ***business survey***. Specific methods 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) and other stakeholders, including SJC Visitors Bureau staff, Parks Board members, and County Council members. Following comments and a conference call, CRC produced the final surveys. Survey questions are provided in the results section.

Sample development and survey administration

The study targeted two populations, residents and businesses.

Residents

The target population for the resident survey was ***adults who live or work in San Juan County***. A representative sample was developed primarily from voter registration rolls.

Postal invitations and reminders were sent to a random sample of just over 2,000 San Juan County registered voters (which include about 75% of the census-based 2017 estimate of 16,715 adult residents in the county). The initial goal was an overall sample of 400, with at least 110 from Lopez Island. The final sample included ***829 residents,*** which exceeded targets and provides estimates with about 5% margin of error with 95% confidence intervals.

After accounting for undeliverable invitations, the ***response rate was 42%***. This exceeded response rates for the SJC Parks, Trails, and Natural Areas surveys in 2009 (20%) and 2016 (12%) that also used voter registration rolls (but no reminders and minimal publicity). This high response rate shows the benefits of multiple reminders, a well-orchestrated publicity campaign by members of the TMG, and high interest in tourism topics.

Sub-groups that may be under-represented include 1) people who live in rentals and do not vote in the county; 2) people who own second homes and do not vote in the county; and 3) seasonal workers who do not own property or vote in the county. A sub-sample of vacation rental owners was originally identified for the study, but contact information from county vacation rental permits was not made available.

Businesses

Email invitations and reminders were sent to a census of over 550 business listings from the San Juan County Visitor Bureau and the San Juan, Orcas, and Lopez Chambers of Commerce. The business survey was completed by ***319 business representatives*** (hereafter referred to as "businesses"); this provides estimates with about 4% margin of error with 95% confidence intervals for this small population.

After accounting for undeliverable or unopened emails, the ***response rate was 57%*** (Table 1). This is a very high response rate for any public survey, and indicates the utility of multiple reminder protocols, a

well-orchestrated publicity campaign by members of the TMG, Visitors Bureau, and Chambers of Commerce, and high interest in tourism topics.

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 (e.g., among islands, or between newer vs. longer-term residents). Results generally describe residents first, then businesses.

Findings

Profile of the Resident Sample (n=829)

Island of residence

Where is your island residence located? *(Circle one number)*

1. San Juan 2. Orcas 3. Lopez 4. Other island (please specify)________________

Table 1. Island of residence.

	San Juan	Orcas	Lopez	Other islands
n	348	277	149	34
Percent in survey sample	43	34	18	4
Percent in population (2017)	46	33	18	3

- Other islands included Shaw (n=9), Decatur (8), and Waldron (6); seven other islands had one to three respondents.
- Sample proportions for different islands were very close to 2017 population proportions, suggesting the voter roll and survey sample reasonably represent island populations.
- Note: 21 respondents (3%) did not specify the island where they live.

Years living in the San Juan Islands

How many years have you had a residence in the San Juan Islands?	_____ years

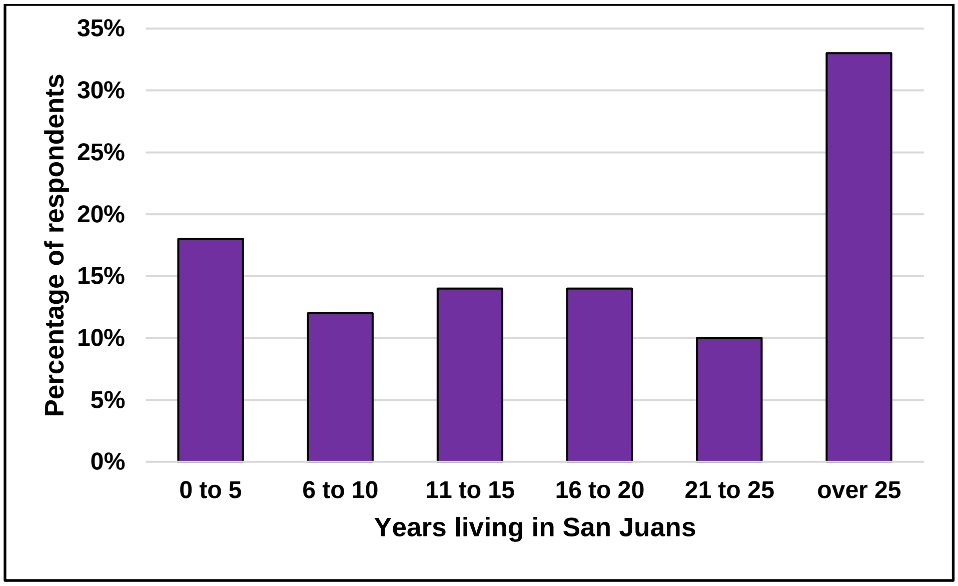

Figure 1. Years living in the San Juan Islands.

- The average for all residents was 21 years (and ranged from 6 months to 100 years).
- About a third have been living in the San Juans less than ten years, and a third more than 25 years.
- Differences among islands were small, with averages slightly lower for Orcas (19 years) than San Juan (21) and Lopez (22).

Months per year on islands

About how many months per year do you live in the San Juan Islands?	_____ months per year

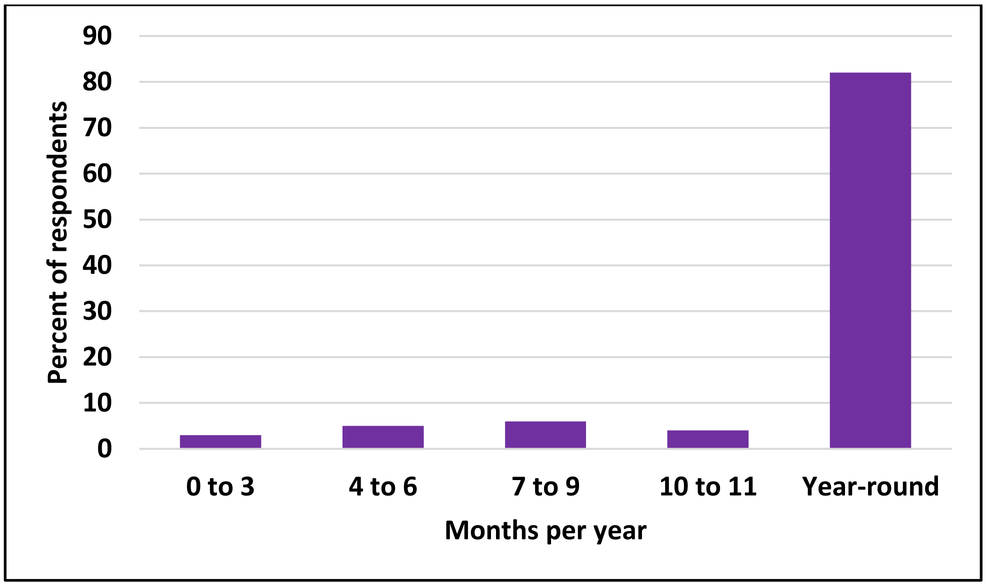

Figure 2. Months per year living on the islands.

- The average for all residents was 11.1 months (and ranged from 1 to 12 months).
- 82% live on the islands year-round, 8% 6 months or less. This small percentage whose residence might best be described as a "second home" is a known consequence of the voter roll sample frame.
- There were no differences among islands for this variable.

Work / retirement situation

Which of the following best describes your work situation?

❑ I work full time
❑ I'm semi-retired or work part-time (less than 20 hours per week or seasonally)
❑ I'm retired → SKIP TO QUESTION 7
❑ I'm a stay-at-home parent / guardian → SKIP TO QUESTION 7
❑ Other (please specify): ____

Table 2. Work / retirement situations.

	Percent
Full time	36
Semi-retired / part-time work	18
Retired	40
Other work situation	6

- 54% report full or part-time work. This is close to the census estimate for the county in 2018 (56%), but lower than for Washington state-wide (63%).
- There were a few substantive differences among islands. Lopez has a lower proportion of full-time workers (24%) and more full-time retirees (54%) compared to San Juan (40% full time workers and 37% full retirees) and Orcas (35% full time workers and 38% full retirees).

Work vs. living situation

If you work (full or part-time), please indicate your living situation:

- ❑ I work on the same island where I reside
- ❑ I work on one island and live on another
- ❑ I work on the mainland and commute
- ❑ Other (please specify): ____________________

Table 3. Percent of residents reporting different living/work situations.

	Percent
Same island	79
Other island	2
Multiple islands	4
Work on mainland	10
Remote work	5
Other situation	< 1

- Among those who work, 79% do so on the same island where they live.
- There were a few small differences among islands. San Juan Island residents were slightly more likely to work on the mainland, while Orcas and Lopez residents were slightly more likely to have an “other” situation (such as remote work).

Work in tourism-related jobs

If you work (full or part-time), please indicate if you work for a tourism-based business *(Check all that apply).*

❑ I don't work for a business directly involved with tourism.

OR...I work for a...

❑ Retail business
❑ Restaurant / food & beverage service business
❑ Accommodations (hotel / motel / campground)
❑ Real estate / property management
❑ Outfitting or guiding
❑ Other service businesses that include tourists as clients
❑ Other tourism-based business (please describe: ______________________)

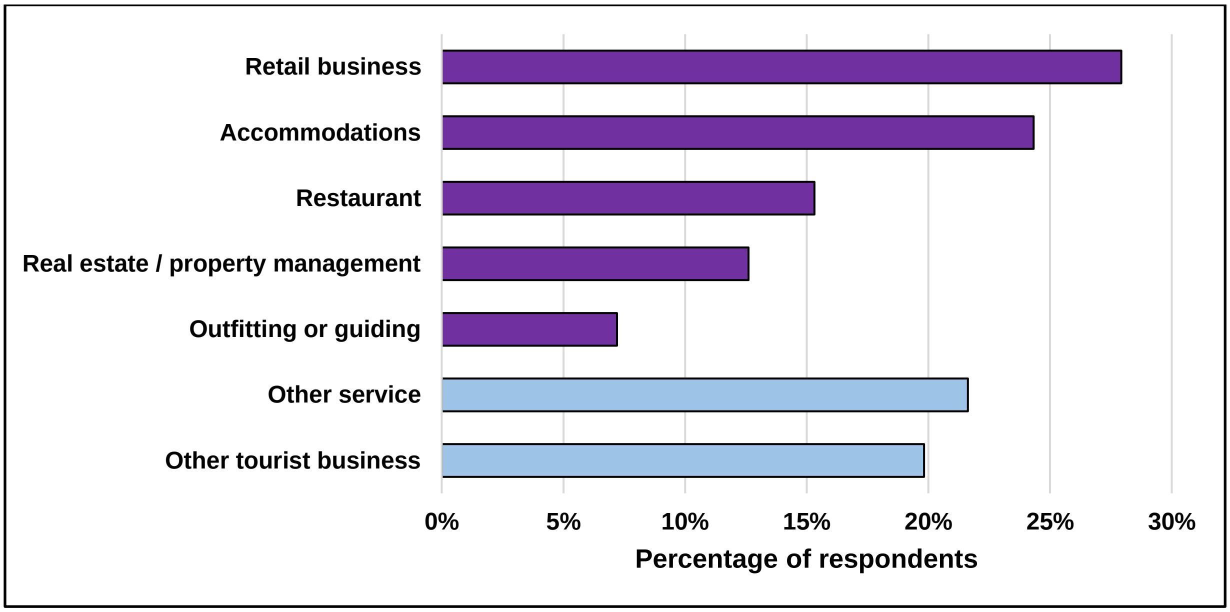

Figure 3. Percent working in different tourism businesses.

Note: Results sum greater than 100% because respondents could check all that apply.

- Of the residents who report working, 24% say they work in tourism. This is lower than the 32% estimated for the "leisure and hospitality" sector in state labor statistics, possibly because many are seasonal workers (who may be under-represented in this voter-based sample).
- A smaller proportion of San Juan Island residents work in tourism (21%) compared to Orcas (24%), and Lopez (32%). This makes sense because San Juan Island has a more diverse economy and more government functions.

Outdoor recreation participation

During the summer, about how many ***days per week*** do you recreate outdoors (for more than an hour per day)?
_____ days per week

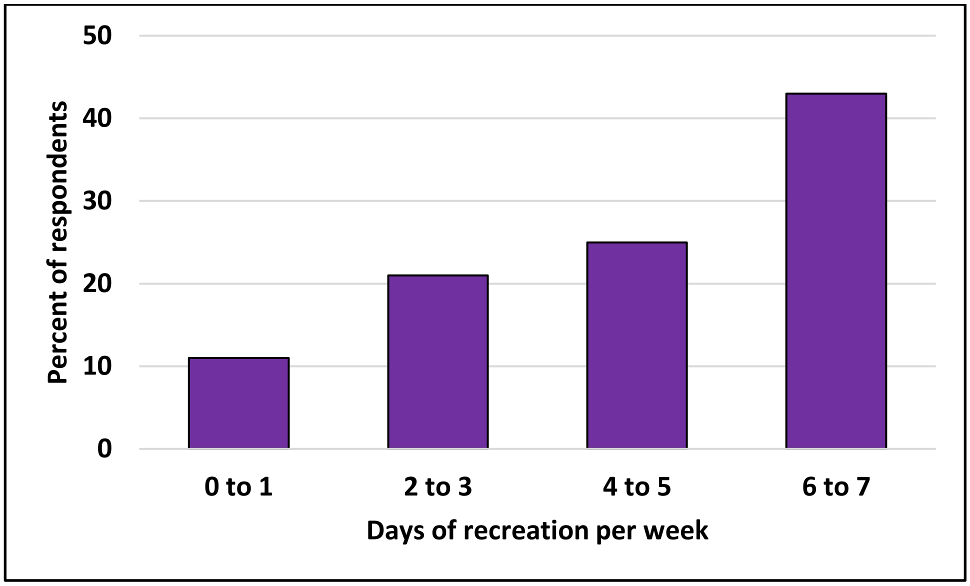

Figure 4. Summer outdoor recreation participation.

- The average reported level of recreation participation was 4.7 days a week, with 43% reporting six to seven days a week. This is high given that national recreation participation surveys report only 22% of Americans recreate three to seven days per week (OIA, 2016), although question and season format may explain some differences.
- There were no substantive differences among islands.

Vacation rental information

Do you rent your island residence (or part of your home or property) to visitors?
❑ No
❑ Yes

If yes…which of the following best describes your rental?
1. The entire house 2. Separate apartment 3. Bedrooms or rooms in the house 4. Other (please specify):

How many bedrooms does your rental include? _____ bedrooms

About how many weeks per year is your rental available?
About ____ weeks per year

About how many weeks was your rental actually rented in 2018?
About ____ weeks in 2018

Table 4. Vacation rental information.

	Count	Percent
Residents with vacation rentals	60	7% of sample
Among those with rentals (n=60)		
Entire house	26	46%
Other rental (guest house, tree house, 2nd house)	14	25%
Separate apartment	12	21%
Room in house	5	9%
Average number of bedrooms	2.2	
Weeks available per year	34.8	
Weeks booked per year	20.2 / year	
Percent available less than 22 weeks (May-Sep)	33%	
Percent booked at least 22 weeks	38%	
Percent available year round	32%	
Percent booked year round	11%	
Calculated average occupancy	58%	

- We have a small sample of vacation rental (VR) owners (n=60, about 7% of our sample). As discussed in the 2017 report:
  - There are about 13,600 housing units in the county, with about 7,700 occupied by full-time resident households (San Juan County Community Development, 2017). Seven percent of 13,600 estimates about 950 VRs, which is similar to the number of permitted VRs (currently just over 1,000).
  - Of the 7,700 full-time resident households, about 71% or 5,500 own their homes, and 29% or 2,200 live in long-term rentals. Occupied homes in these two groups probably are not candidates for additional VRs.
  - The remaining 6,000 housing units are commonly described as "second homes." Some are currently VRs (estimated at a little over 1,000), while the rest are so-called "vacant homes" (about 5,000). The former are permitted by the County to be rented to visitors, similar to hotels or other accommodation. The latter are used part-time, and some could become VRs in the future.
  - Our study sample of VR owners slightly underestimates the proportion of VRs among residents, and may not represent all VR permittees. Analyses of VR permits (recently collected by the County but not yet analyzed) or lodging tax receipts from VRs might provide better estimates of some characteristics. A survey of permittees might provide the best data, but the permit list was not made available for the present study. ***With these caveats, here are the results from this small sample.***
- 46% of VRs in our sample rent their entire house; 46% rent separate apartments, guest houses, etc.; and 9% rent individual rooms.
- VRs average 2.2 bedrooms.
- About one-third are ***available*** year-round, and about a third less than 22 weeks (approximately the number of weeks from May through September, although the question didn't specify). The average is 35 weeks a year.
- On average, VRs are ***rented*** about 20 weeks per year. This average is skewed by a few VRs (about 11%) that are booked nearly year-round.

Information about considering vacation rentals and "guest-days" estimates

If no…Would you ever consider renting your home (or a part of your home) to visitors? *(Check all that apply)*

❑ No.
❑ Maybe, if the price was right.
❑ Maybe, if my living situation changed.
❑ Maybe, if regulations made this easier.
❑ Yes, I am thinking about this.

Some people invite friends and family to share (***not rent***) their home. About how many days per year do out-of-town guests stay in your home?

About ____ days per year

Table 5. Responses about considering vacation rentals and "guest-days" per year

	Count	Percent
Residents without vacation rentals	746	93%
Among those without rentals (n=746)		
Average "guest-days" per year	15.9	
No, I would never have a vacation rental	491	67%
Maybe, if the price was right	29	4%
Maybe, if my living situation changed	133	18%
Maybe, if regulations changed	46	6%
Yes, I'm considering this…	34	5%

- Most residents do not offer their homes as VRs (93% of the sample). But some might do so in the future (about 28%, the sum of the three "maybe" categories) if their living situation changed, the regulations changed, or the price was right. About 5% are considering this now.
- Residents who ***don't*** rent VRs report that friends and family share their homes an average of 15.9 days a year. These contribute to visitor numbers, although they are challenging to include when estimating visitor use and are not typically considered when assessing accommodation supply.

Boat ownership

Do you own a boat or boats(s)? *(Check all that apply and give length of larger boats)*
❑ I don't have a boat → SKIP TO END OF SURVEY
❑ Kayak
❑ SUP
❑ Sailboat about ____ feet
❑ Powerboat about _____ feet
❑ Other (describe): ________________

Do you keep your boat or boats in the water? *(Check all that apply)*
❑ No, I launch it each time I use it
❑ Yes, at ______________ marina
❑ Yes, at my own dock or mooring

Table 6. Boat ownership.

	Count	Percent
Residents that own at least one type of boat	464	56%
Types of boats (n=464)		
Powerboats	220	27%
Kayaks	216	26%
Sailboats	82	10%
Other (e.g., canoes, row boats, lake skiffs)	75	9%
SUPs	49	6%
Average length of powerboats	23 feet	
Percent of powerboats over 30 feet	21% (largest was 65 feet)	
Average length of sail boats	24 feet	
Percent of sailboats over 30 feet	39% (largest was 65 feet)	
Boat storage		
Launch each time they use it	51%	
Yes at a marina	31%	
Yes at own private dock	17%	

- Most residents report owning a boat (56%), with 27% powerboats, 26% kayaks, 10% sailboats, and 15% other small craft (SUPs, canoes, or row boats).
- The average size of power and sailboats is 23 and 24 feet, respectively.
- About half launch from trailers each time, 31% keep boats at a marina, and 17% use private docks.
- There were a few differences among islands. By percentage of residents, San Juan has more powerboats (49%) and kayaks (47%) but fewer sailboats (19%); Orcas has more boats launched by trailer (62%) and fewer at private docks (6%); Lopez has more kayaks (57%).

Profile of the business sample (n=319)

Business location and islands served

Where is your business located? *(Check all that apply)*
❑ San Juan ❑ Orcas ❑ Lopez ❑ Other ______________

On which island do you live? *(Check one)*
❑ San Juan ❑ Orcas ❑ Lopez ❑ Other ______________

Which islands does your business serve? *(Check all that apply)*
❑ San Juan ❑ Orcas ❑ Lopez ❑ Other ______________

Table 7. Count and percent of business representatives who live on different islands.

	San Juan	Orcas	Lopez	Other island/location[1]
Business location (n)[2]	138	123	49	16
Percent	42	38	15	5
Island of residence (n)[3]	133	124	48	8
Percent	42	39	15	3
Location served (n)[4]	176	182	129	68
Percent	55	57	40	21

1. Includes businesses on the mainland.
2. Primary location; exceeds total sample because some businesses have more than one location.
3. Island where representative reported living.
4. Exceeds sample because many businesses serve more than one island.

- San Juan Island has the highest number of businesses, followed by Orcas and Lopez. Most respondents live on the island where their business is located.
- Many businesses serve more than one island.

Years of business operation

How many years has your business served the San Juan Islands? _____ years

- The average was 22 years, with a range from 1 to 134 years. About 21% have been in business five years or less, with 31% over 30 years.

Size of business (number of employees)

How many employees does your business employ during the summer season?
❑ 1 to 2 full-time equivalent employees
❑ 3 to 5 full-time equivalent employees
❑ 6 to 10 full-time equivalent employees
❑ Over 10 full-time equivalent employees

Table 8. Number of summer employees.

	Percent
1 to 2 full-time equivalent (FTE)	53
3 to 5 FTE	18
6 to 10 FTE	13
Over 10 FTE	16

- 53% of the businesses have 1 to 2 employees, and 71% have five or less.
- Differences among islands were small, although San Juan Island had higher percentages in the top two categories (34% compared to 22% for the other two islands).

Revenue from tourism

In general, what percent of your business revenue comes from visitors or tourism?

❑ Less than 25% of revenue
❑ Between 25% and 50%
❑ Between 50% and 75%
❑ Over 75%

Table 9. Percent of businesses reporting different levels of revenue from tourism.

	All businesses (Percent)	San Juan	Orcas	Lopez	Multiple islands
Less than 25%	31	11	28	39	43
25 to 50%	20	27	18	27	16
50 to 75%	13	10	17	9	14
75 to 100%	35	52	37	24	26

- About 35% of all businesses get over 75% of revenue from tourism, while 31% get less than 25%.
- San Juan Island businesses appear more reliant on tourism revenue (52% in the 75 to 100% category).
- Businesses serving multiple islands are less reliant on tourism (43% report less than 25% tourism revenue).

Type of business

Which of the following categories best describes your business? *(Check all that apply)*

❑ Transportation (bus, shuttle, taxi, boat taxi, etc.)
❑ Retail – groceries, liquor, etc.
❑ Retail – arts, crafts, gifts, etc.
❑ Retail – electronics, hardware, marine supplies, etc.
❑ Restaurant / food & beverage services
❑ Accommodations -- hotel / motel / B&B
❑ Accommodations – vacation rentals
❑ Accommodations -- campgrounds
❑ Guide / outfitter
❑ Real estate / property management
❑ Financial services / banking
❑ Other services
❑ Healthcare
❑ Construction
❑ Manufacturing
❑ Agriculture
❑ Other (please specify): ______________________________

Table 10. Types of businesses by category.

	Percent
Arts, crafts, gifts, clothing, etc.	19
Restaurant	14
Other services	13
Hotel/motel/B&B	11
Guide/outfitter	10
Non-profit/community service	9
Vacation rental	9
Transportation	8
Real estate/property management	8
Groceries, Liquor, beverages, etc.	7
Healthcare/wellness	6
Agriculture	5
Construction/home services	4
Wedding/event services	4
Financial/banking	2
Performing arts	2
Campground	2
Manufacturing	2
Other industry	2

- Many businesses have connections to tourism, including arts/gifts retail, restaurants, accommodations, guide/outfitter services, and vacation rentals. Taken together, these categories account for over 70% of all businesses.
- These percentages do not reflect the number of people associated with these businesses because the sample was one representative per business.

Reasons for living in the San Juan Islands

Both samples were asked to rate the importance of different reasons for living and working in the San Juan Islands. The list included 13 reasons asked of visitors in 2017, along with five other reasons specific to residents (starred below).

People enjoy living and working 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
*Quality of housing (even if it may be expensive)	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
Boating, sailing, or kayaking	0	1	2	3	4
Biking on rural roads	0	1	2	3	4
*Work availability / economic opportunities	0	1	2	3	4
*To live on an island only accessible by ferry / plane	0	1	2	3	4
*To live with or be near family	0	1	2	3	4
*Agreeable climate	0	1	2	3	4
Others (please list)					

*Not asked of visitors in 2017 survey.

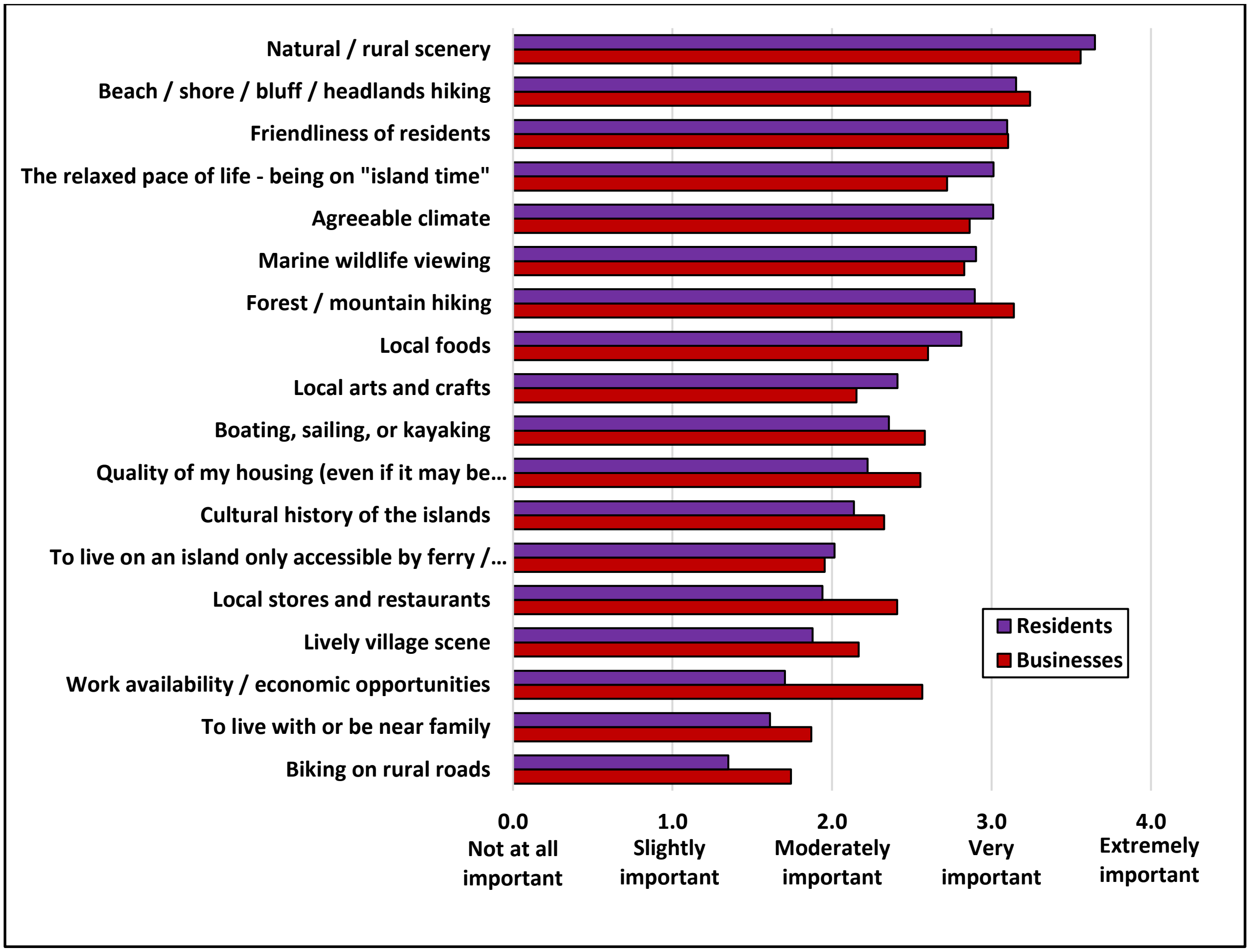

Figure 5. Reasons for living/working in the San Juan Islands (ordered by residents' average ratings).

- The top two, and five of the top seven, are related to natural resources and occur on public land.
- Among the social setting reasons, the "friendliness of residents" and "relaxed pace of life" are in the top four, and more important than a "lively village scene." This is similar to visitor survey findings.
- Differences between residents and businesses were generally small (less than .5 on the 5-point scale) for most attributes.
- Notable exceptions were "work availability / economic opportunities" and "local stores and restaurants," rated more important by businesses.
- Differences between visitors (from 2017 ferry survey) and residents/businesses were generally small, with a similar rank ordering and the four highest-rated reasons nearly identical. However, there were some interesting differences:
    - Residents and businesses rated boating / sailing / kayaking more important (2.4 and 2.6) compared to visitors (1.8).
    - Visitors rated marine wildlife viewing (3.2) more important than residents or visitors (2.9 and 2.8).

- Visitors were closer to businesses for local stores and cultural history (rating both higher than residents).
- Visitors were closer to residents for lively village scene (rating it lower) and the relaxed pace of the islands (rating it higher).
- Local arts and crafts was the only reason rated differently for all three groups, with residents highest (2.4), followed by businesses (2.2), and visitors (1.8).

- We examined bivariate correlations among all the different reasons for living in the San Juan Islands and found two distinct groupings of reasons with higher correlations (over about 0.4).
  - Quality of housing, local stores and restaurants, local arts and crafts, local foods, friendliness of residents, and lively village scene were all correlated between 0.4 and 0.6.
  - Natural rural scenery, beach/shoreland/bluff/headlands hiking, forest/mountain hiking, marine wildlife viewing, and boating/sailing/kayaking were all correlated between 0.4 and 0.7.

  Results suggest two general dimensions: 1) an economic and community factor (the first group), and 2) an environment and outdoor recreation factor (the second group). Future research could explore the influence of these factors on perceived tourism impacts or acceptability of management actions.

Reasons for visiting: Differences among islands

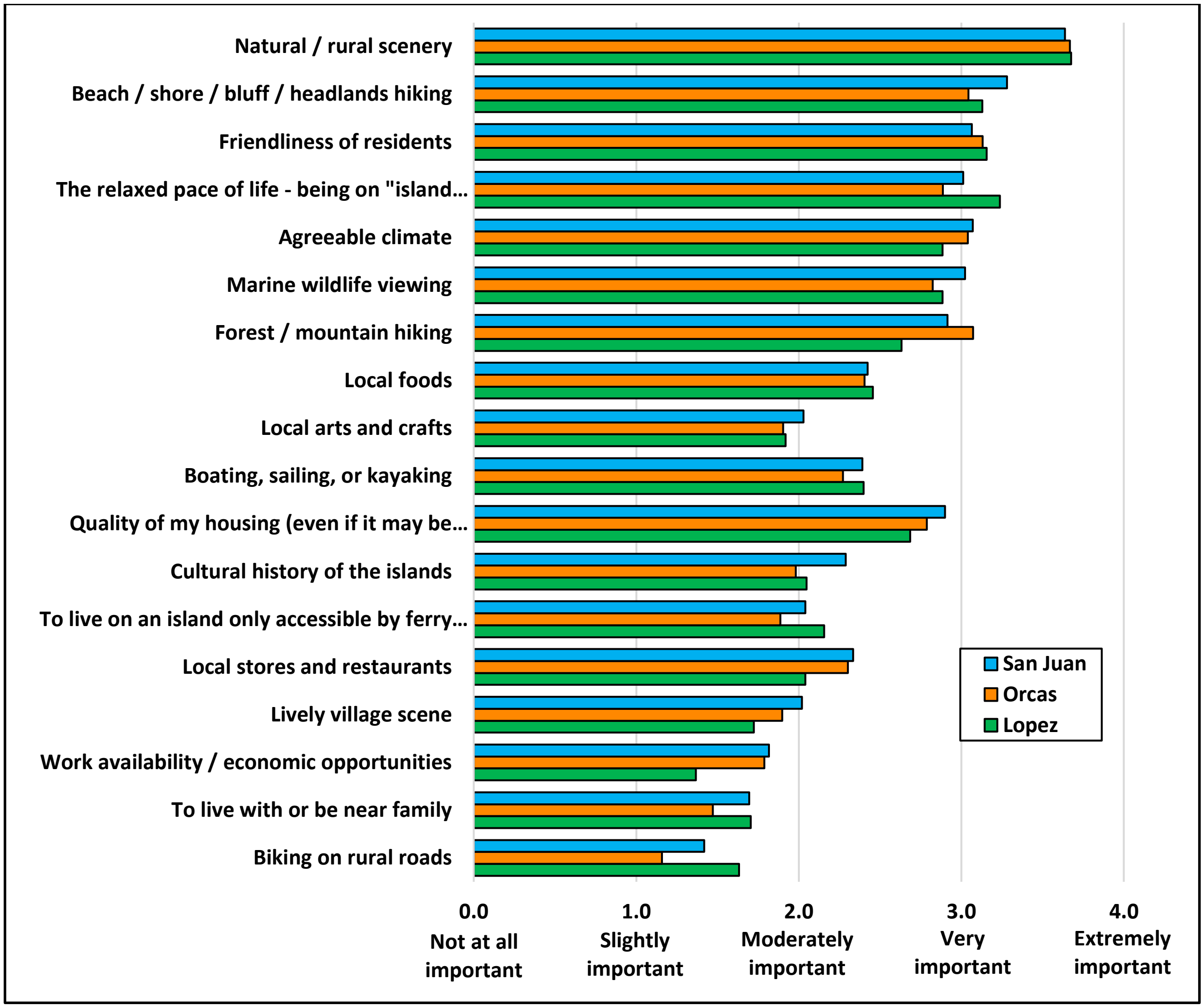

Figure 6. Reasons for living on the San Juans (difference among islands).

- Although they are small, the directions of some differences among islands fit with conventional wisdom.
  - Lopez residents rated a relaxed pace of life higher, and economic opportunities and forest/mountain hiking lower.
  - San Juan residents rated cultural history higher.
  - Orcas residents rated biking on rural roads lower.

Evaluating tourism conditions and islanders' responses to them

Reported crowding

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.

On the island where you live, how crowded do you feel in the following locations during the summer tourist season?

	Not at all crowded		Slightly crowded		Moderately crowded				Extremely crowded
Parking in villages / towns	1	2	3	4	5	6	7	8	9
Parking at trailheads, county & state parks, etc.	1	2	3	4	5	6	7	8	9
On streets in villages / towns	1	2	3	4	5	6	7	8	9
On rural roads (***not*** in villages /towns)	1	2	3	4	5	6	7	8	9
On trails	1	2	3	4	5	6	7	8	9
On beaches	1	2	3	4	5	6	7	8	9
At wildlife viewing areas	1	2	3	4	5	6	7	8	9
Overall	**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 measure indicator ***(the percent feeling crowded or crowding score)*** can then be easily compared among different places, times, groups, or contexts in the San Juan Islands. It can also be compared 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 resident and business surveys. An ***appendix to Part III*** of these reports compiles these and other crowding scores from all the San Juan Island visitor, resident, and business surveys conducted since 2017. This allows comparisons with all the studies, across several places and contexts, as well as comparisons to other similar resources that have crowding data.

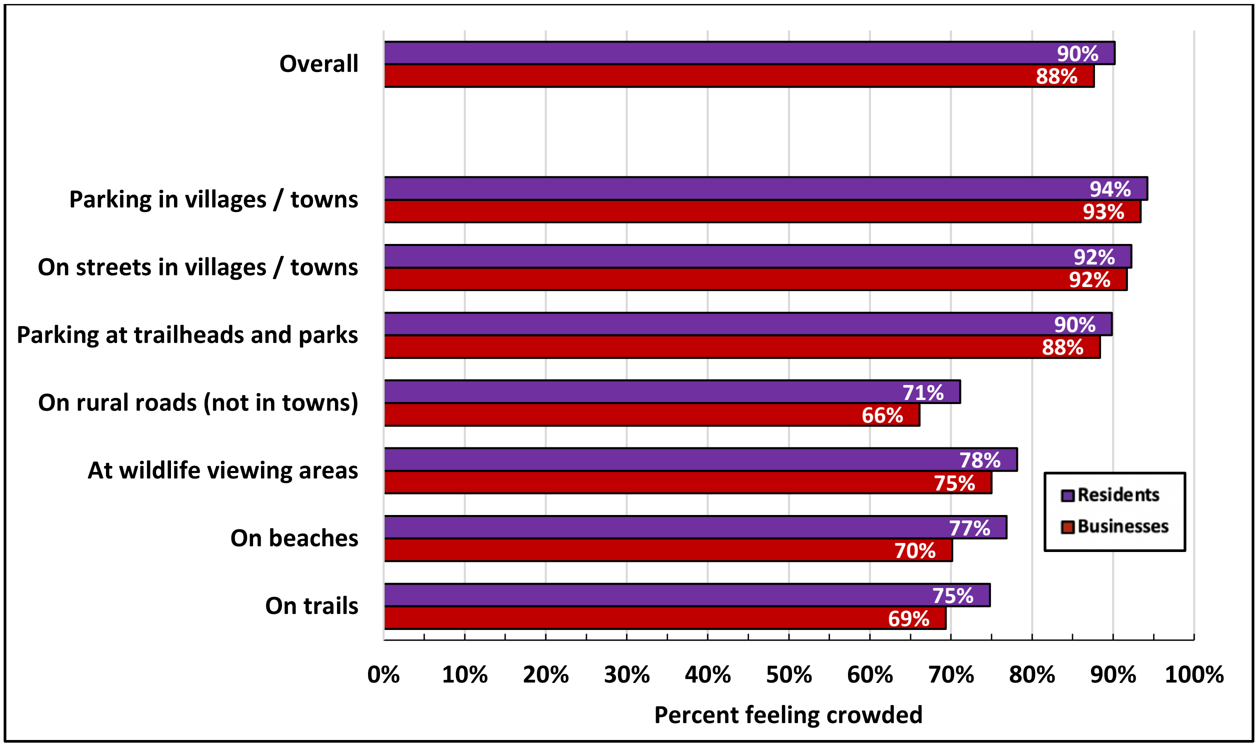

Figure 7. Crowding ratings during summer season, (residents/businesses, all islands combined).

- The highest crowding ratings are for parking and traffic in villages/towns, and parking at trailheads/parks.
- Crowding ratings for marine wildlife viewing areas, beaches, trails, and rural roads (65% to 78%) are distinctly lower than for parking and traffic.
- "Overall" crowding ratings for the San Juans appear to be driven by the most crowded settings (the parking and traffic hotspots). This is similar to Yosemite Valley, where crowded parking and traffic drive overall ratings.
- Findings from the residents/businesses are distinctly different from 2017 visitors, where 68% reported some degree of crowding for parking in villages/towns, 56% for attraction site parking, and less than 40% for roads, beaches, trails, or marine wildlife viewing areas. In general, residents and businesses are more sensitive to crowding than 2017 visitors (perhaps because they have experience with lower-use off-season conditions).
- There were few substantive differences between residents and businesses, and the rank orders were similar.

Crowding ratings -- differences among islands

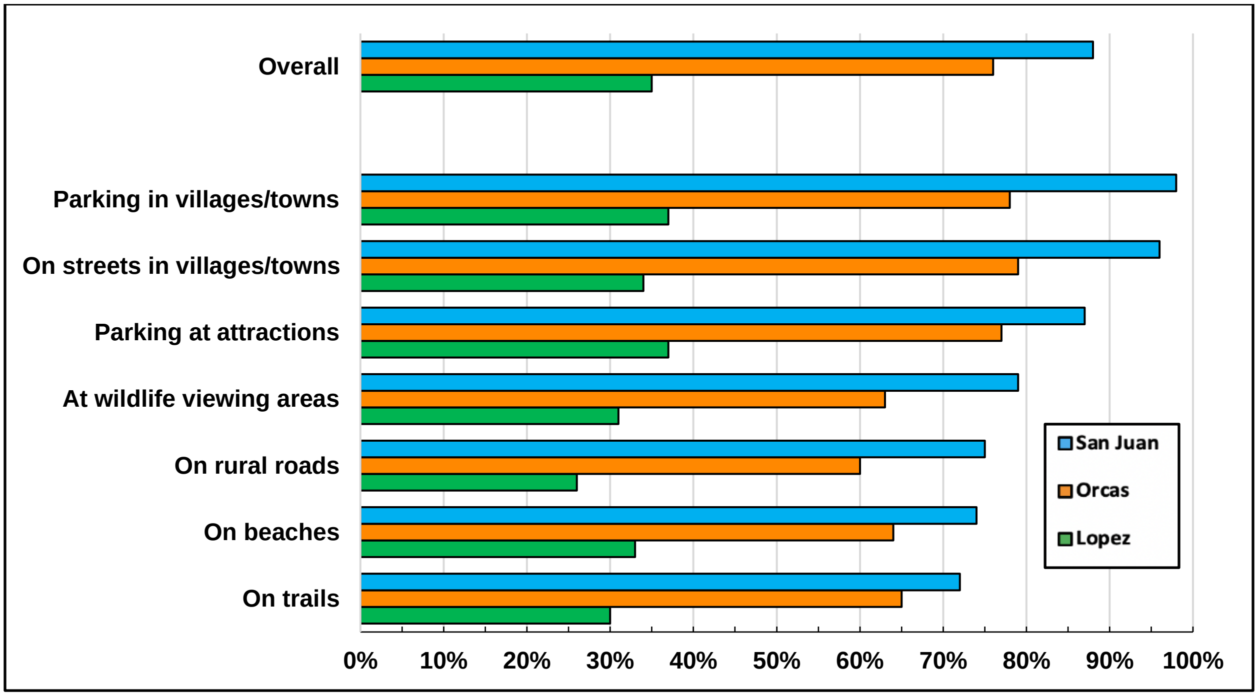

Figure 8. Differences among islands for crowding ratings during summer tourist season (residents only).

- In general, San Juan residents reported the most crowding and Lopez the least, with Orcas in between.
- The largest differences between San Juan and Orcas Islands were for parking and on streets in villages, reflecting the higher densities in Friday Harbor compared to Eastsound.
- These results are ***different from 2017 visitors'*** crowding ratings, which were consistently higher for Orcas than the other two islands.

Traffic congestion in towns/villages

When you drive into the following towns/villages during the summer, how often do you experience traffic congestion?

	Rarely Less than 25% of trips	**Occasionally** 25% to 50% of trips	**Frequently** Over 50% of trips	I rarely drive into this village
Friday Harbor	1	2	3	4
Eastsound	1	2	3	4
Lopez Village	1	2	3	4

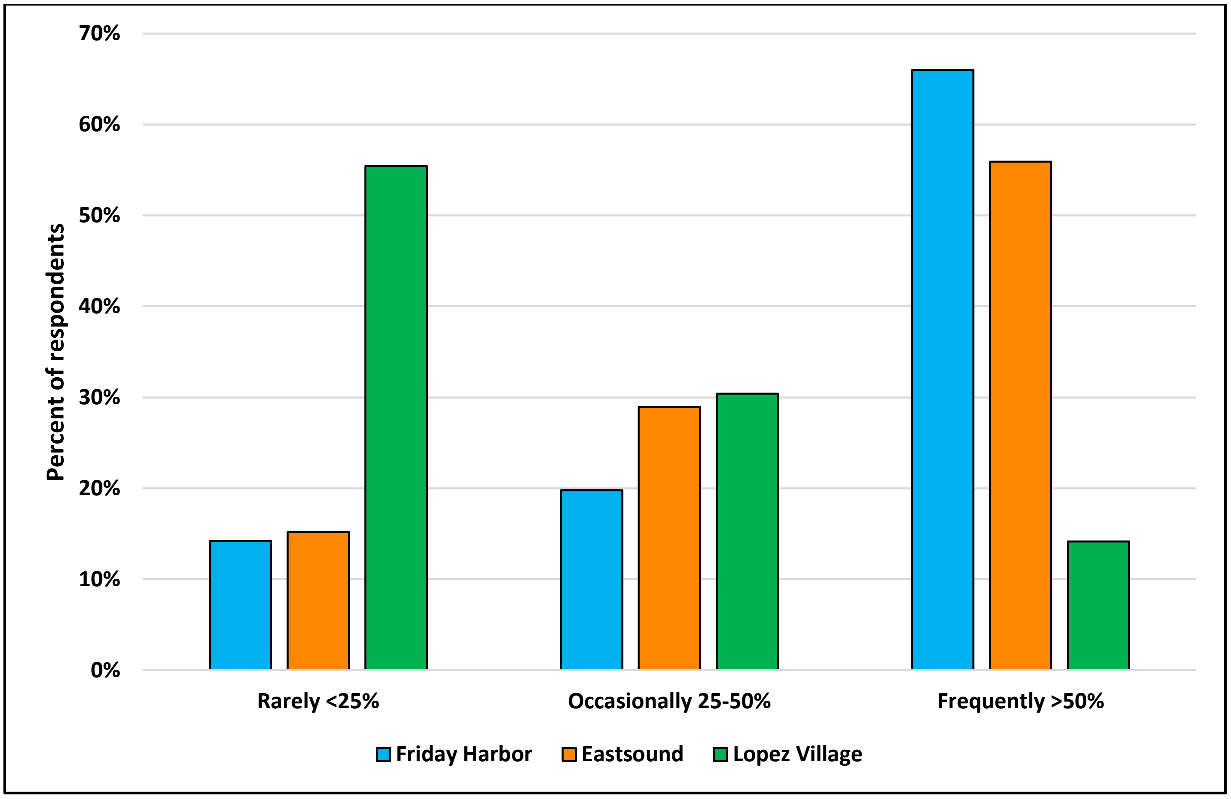

Figure 9. Traffic evaluations in villages.

- Rarely drive into this village: 27% Friday Harbor, 39% Eastsound, 61% Lopez Village.
- Among those who evaluated the conditions…
  - Majorities report frequent traffic congestion in Friday Harbor (66%) and Eastsound (56%), in contrast with 15% for Lopez Village.

Parking in towns and villages

When you drive into the following towns/villages during the summer, how often does it take over 5 minutes to find a parking space?

	Rarely Less than 25% of trips	**Occasionally** 25% to 50% of trips	**Frequently** Over 50% of trips	I rarely drive into this village
Friday Harbor	1	2	3	4
Eastsound	1	2	3	4
Lopez Village	1	2	3	4

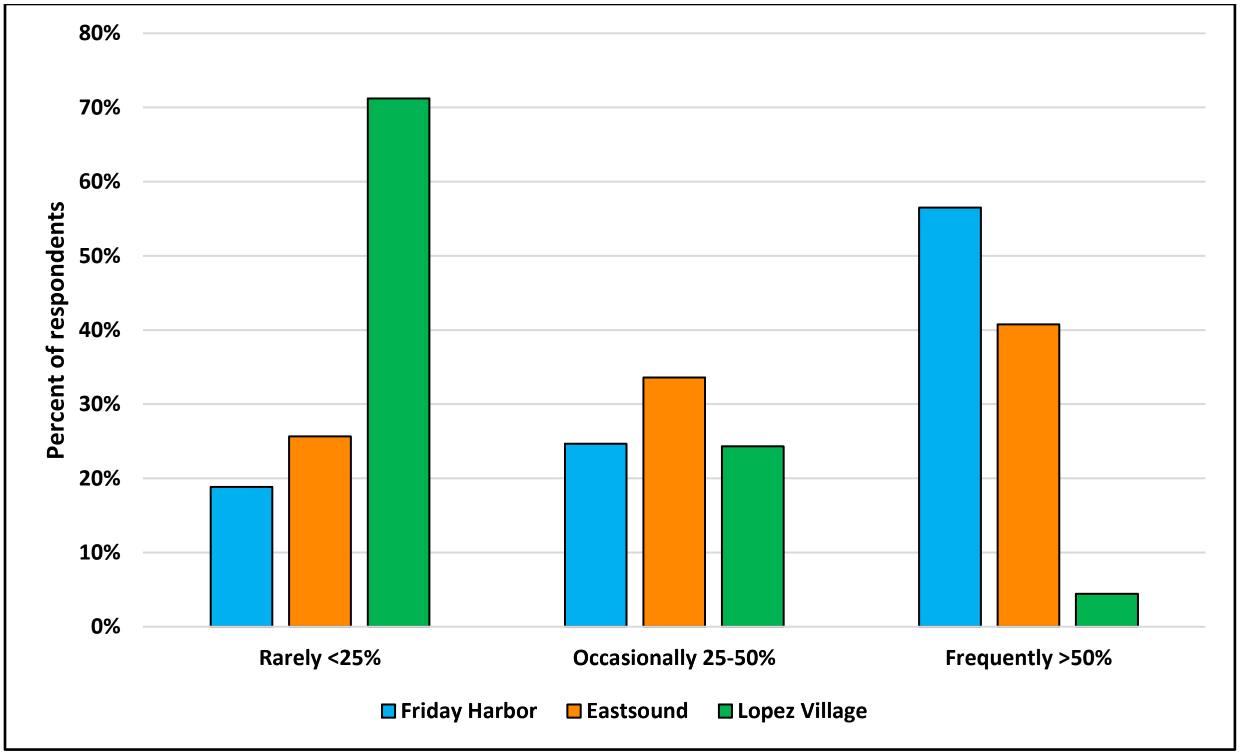

Figure 10. Parking evaluations in villages.

- Rarely drive into this village: 27% Friday Harbor, 40% Eastsound, 63% Lopez Village.
- Among those who evaluated the conditions, 57% report frequent challenges finding a parking space in Friday Harbor, compared to 41% for Eastsound and 4% for Lopez Village.
- Results for traffic congestion and parking are similar, but traffic congestion is reported slightly more often.

Coping with crowding and congestion

Residents use the same roads, trails, and parking areas as visitors. When there are too many people, how do you cope with it? *(Check all that apply)*

- ❑ There are never too many people using roads, trails, and parking.
- ❑ I avoid congestion by going at a different time of day or day of the week.
- ❑ I avoid congestion by going during the off-season.
- ❑ I avoid congestion by going to a less crowded location.
- ❑ I resign myself to the new conditions.
- ❑ I become dissatisfied.
- ❑ I consider moving my residence to a less crowded town or region.
- ❑ Other (specify):____

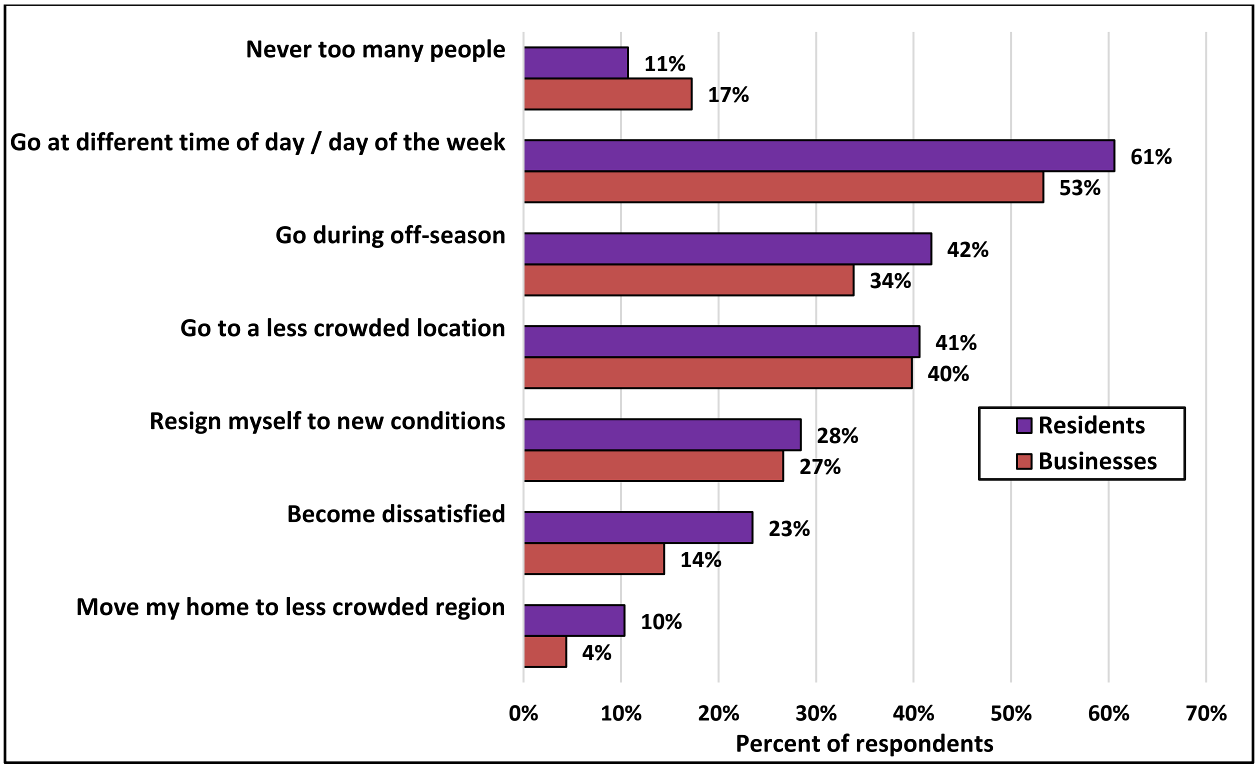

Figure 11. Residents' and businesses reported coping responses to crowding.

- About 11% of residents and 17% of businesses report there are "never too many people."
- Among those who reported too many people, the most common response (53 to 61%) was ***temporal displacement*** (going on a different day or time). This was similar to 2017 visitors (58%).
- Many residents (42%) also report ***seasonal displacement*** (going in the off-season), and many visitors (47%) report the same strategy.
- For ***geographical displacement,*** 40 to 41% of residents and businesses say they would "go to another location" (on the islands). In response to a differently worded question, 30% of visitors said

they would “visit different tourist destinations instead;” these visitors would be lost from the San Juan Islands’ visitor economy.

- About 10% of residents and 4% of businesses would “consider moving my residence to a less crowded town or region.”
- Among residents and businesses, 27 to 28% resign themselves to higher density conditions (sometimes called a ***product shift, where the experience changes***). Fewer become dissatisfied (23% of residents and 14% of businesses).

Evaluating tourism

General opinions about San Juan Islands tourism issues

Residents and businesses 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. Figures 17 (for residents) and 18 (for businesses) show percent agree and disagree (neutral responses are 100 minus the sum of other responses), ordered from greatest to least agreement based on averages. Figure 19 compares simplified percentages (without the slightly/strongly distinctions) to highlight differences between residents and businesses.

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 local community.	-2	-1	0	1	2
Crowding is reducing the quality of recreation experiences on 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 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 my community.	-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 of the islands.	-2	-1	0	1	2

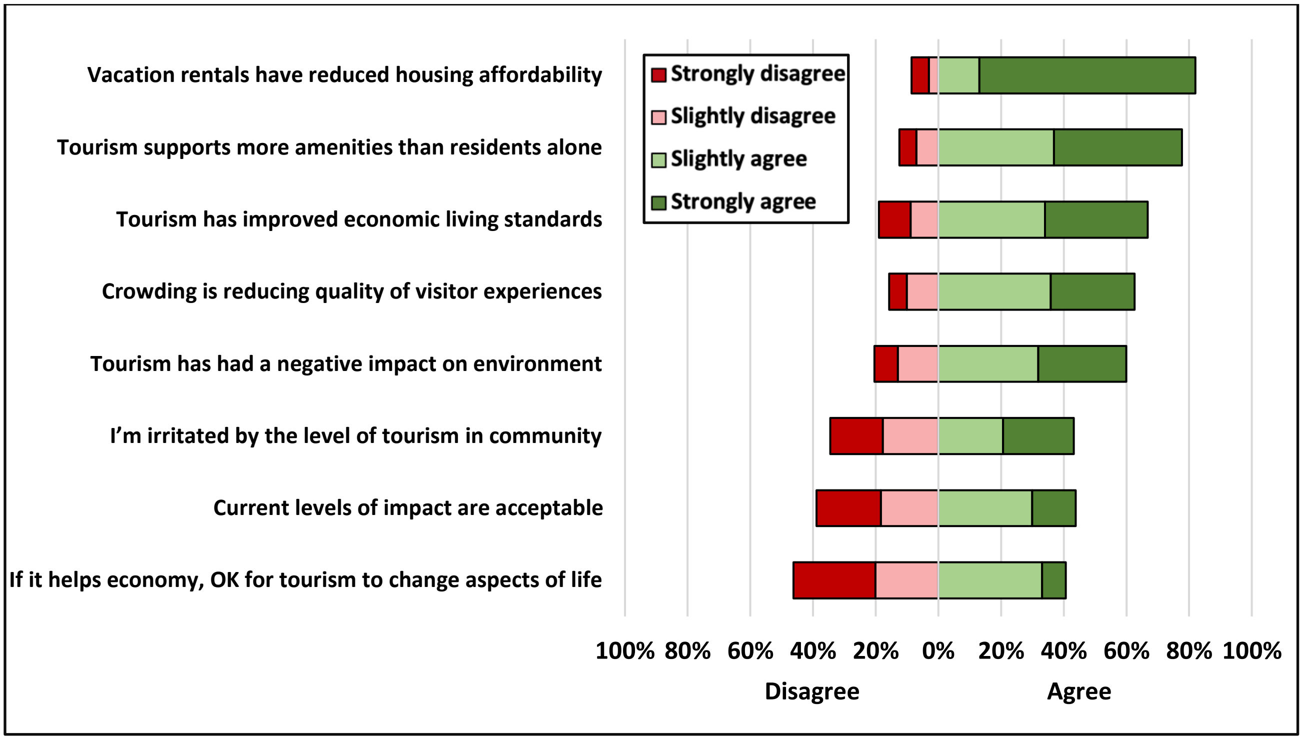

Figure 12. <u>Residents'</u> general opinions about tourism issues.

- The greatest agreement (82%) was about vacation rentals reducing affordable long-term rentals.
- Majorities agree that tourism provides benefits such as amenities (78%) and living standards (67%).
- Majorities also recognize that tourism produces crowding that reduces the quality of visitor experiences (63%), and has negative impacts on the environment (60%).
- Residents were more evenly divided about other issues. Slightly more agree than disagree that "I'm irritated by the level of tourism in my community," and "current levels of impact are acceptable." Slightly more disagree than agree that "if it helps the economy, it's OK if tourism changes some aspects of life."
- Taken together, results indicate thoughtful assessments about the trade-offs associated with tourism.

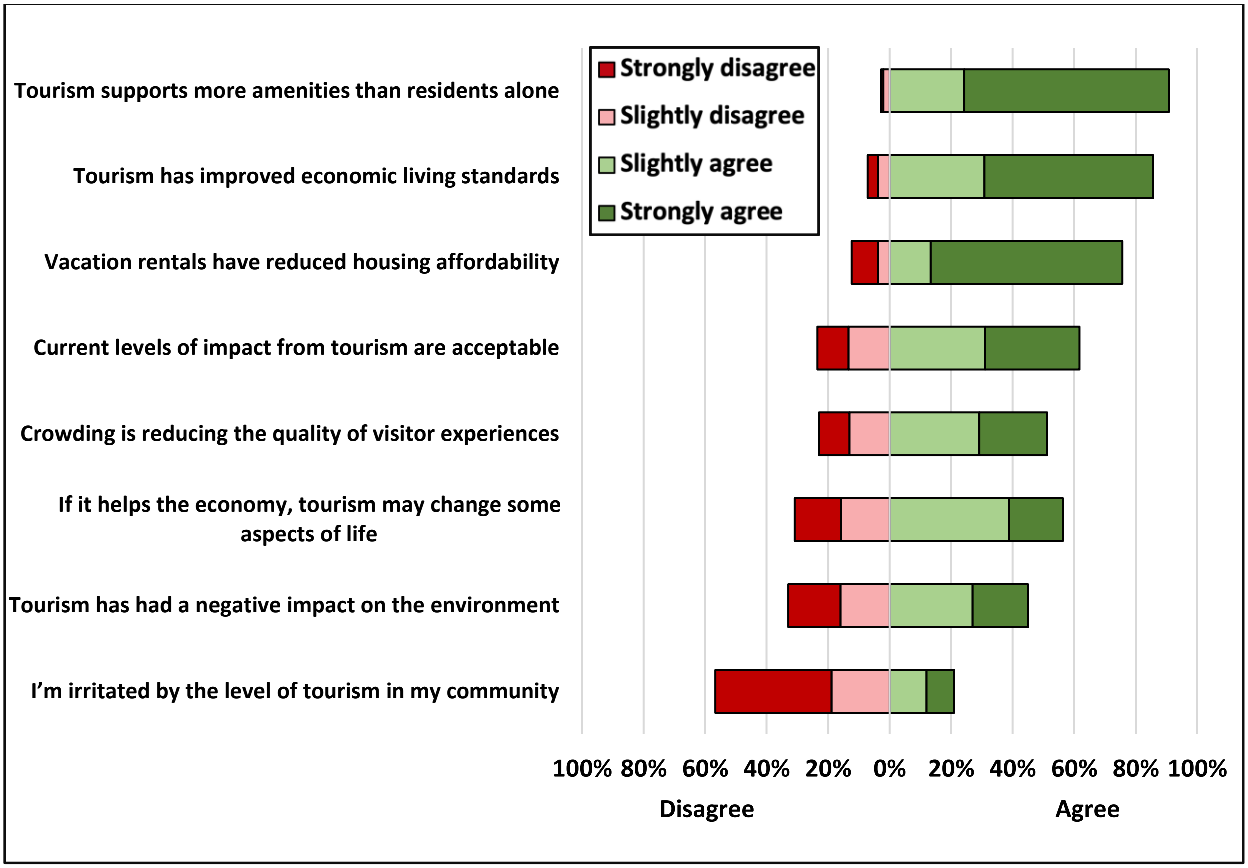

Figure 13. <u>Businesses'</u> general opinions toward tourism issues.

- For businesses, there was agreement that tourism supports amenities (91%) and improves living standards (86%). On the other hand, 76% agreed that vacation rentals reduce affordability of long-term rentals.
- There also was majority business agreement with "current impacts are acceptable" (62%) and "OK if tourism has impacts as long as it grows the economy" (56%), along with recognition that "crowding reduces visitor experiences" (51%). Businesses were more evenly divided (46% agree vs. 34% disagree) that tourism has "negative impacts on the environment."
- In addition, 58% of businesses ***disagreed*** that they are "irritated" by tourism in their community.
- Taken together, these findings suggest that businesses are more likely to identify the economic benefits from tourism, while acknowledging some negative impacts.

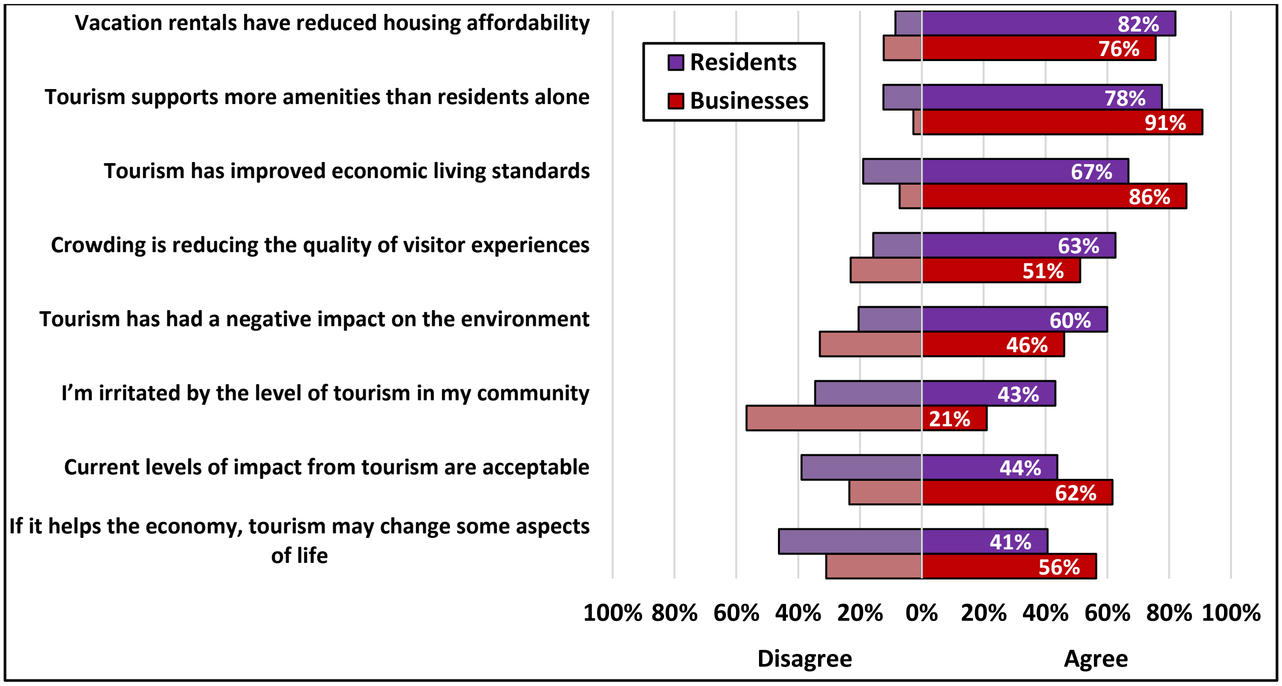

Figure 14. Comparison of residents' and businesses' general opinions toward tourism issues.

- Businesses were more likely than residents to recognize amenities and economic benefits from tourism.
- Businesses were more likely than residents to agree that current impact levels are acceptable, and even if tourism changes some aspects of life, those changes are acceptable as long as it helps the economy.
- These differences fit with a common assertion that businesses prioritize economic growth.
- However, ***it is striking that differences between residents and businesses are small***; in all but one case, residents and businesses lean the same direction, but differ in degree.

General tourism opinions – Differences among islands

- Based on average scores, there were small differences among islands for five of the eight statements.
- In general, San Juan Island residents were slightly more "pro-tourism" or less concerned about its impacts than Orcas or Lopez residents.
  - "If it helps the economy, it's OK for tourism to cause some changes" – 47% agreed for San Juan, vs. 40% for Orcas and 30% for Lopez.
  - "Current levels of tourism impact are acceptable" – 49% agreed for San Juan, vs. 38% for Orcas and 43% for Lopez.
  - "Tourism has improved the living standard" -- 74% agreed for San Juan vs. 62% for Orcas and 61% for Lopez.

- “Tourism has a negative effect on the islands’ environment” – 53% agreed for San Juan vs. 67% for Orcas and 66% for Lopez.

General tourism opinions – Differences between new vs. long-term residents

- There were statistically significant differences for six of the eight statements. In all cases, new residents (5 years or less) were more likely to be “pro-tourism” or less concerned about its impacts than longer-term (over 5 years) residents.
  - “If it helps the economy grow, some changes are acceptable” -- 50% of new residents agree vs. 38% of longer-term residents ($t=3.6$, $p<.001$).
  - “I’m generally irritated by the level of tourism in my community” – 33% of new residents agree vs. 46% of longer-term residents ($t=-3.2$, $p<.001$).
  - “Current tourism impacts are acceptable to me” – 55% of new residents agree vs. 42% of long-term residents ($t=3.3$, $p<.001$).
  - “Tourism has improved the living standard of the islands” -- 73% of new residents agree vs. 66% of long-term residents ($t=2.7$, $p<.006$).
  - “Tourism supports more amenities than residents alone” – 85% of new residents agree vs. 76% of long-term residents ($t=2.4$, $p<.007$).
  - “Crowding is reducing the quality of visitors’ experiences” – 56% of new residents agree vs. 64% of long-term residents ($t=-2.3$, $p<.01$).

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 (we 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).

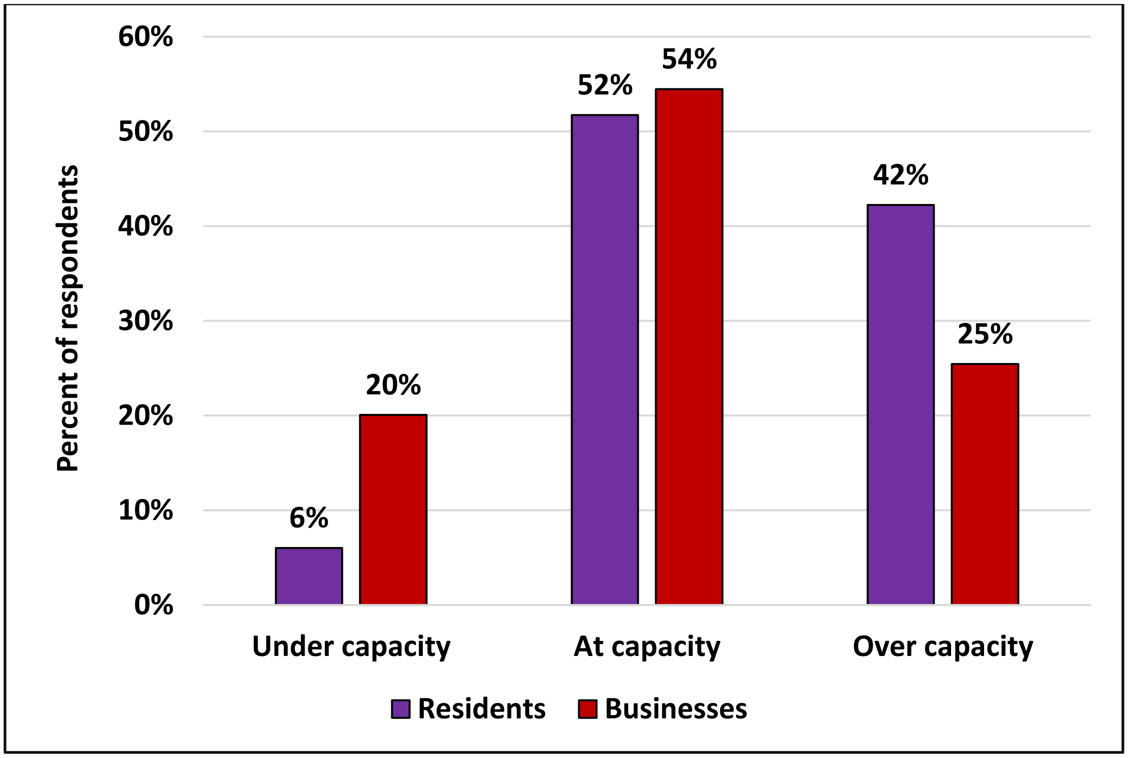

Figure 15. Capacity evaluations for residents and businesses.

- Most residents indicate the San Juan Islands are at (52%) or over (42%) capacity during peak summer season (94% taken together). Only 6% report the San Juans are "under capacity, we can handle more tourists."
- Businesses are similar for at capacity (54%) but lower (25%) for over capacity (79% taken together), with 20% under capacity.
- Results are consistent with other findings showing businesses are slightly more pro-tourism or less concerned about impacts.
- Correlations measure the strength of a relationship between two variables; they can range from -1.0 (inversely correlated) to 0.0 (no correlation) to 1.0 (correlated). Analysis assessed correlations between capacity evaluations and these general tourism statements and showed consistent strong relationships (in most social science contexts, correlations over 0.5 are considered strong).

Example correlations are provided below. In general, they show that people more likely to report the San Juan Islands are over capacity are also more likely to agree there are negative tourism impacts (first three statements in green, all positive correlations) and less likely to agree that impacts are acceptable, acceptable if it helps the economy grow, or that tourism improves the economic standard of living in the community (the second three statements in red, all negative correlations).

Correlations with capacity evaluations

"I'm generally irritated by the level of tourism in my community."	r = 0.67
"Crowding is reducing the quality of recreation experiences on the islands."	r = 0.49
"Tourism has had a negative impact on the natural environment of the islands."	r = 0.52
"The current level of impact from tourism is acceptable to me."	r = -0.67
"If it helps the local economy grow, it is acceptable if tourism changes some aspects of life in the San Juan Islands."	r = - 0.52
"Tourism has improved the economic living standard of the local community."	r = - 0.50

Capacity evaluation differences by island

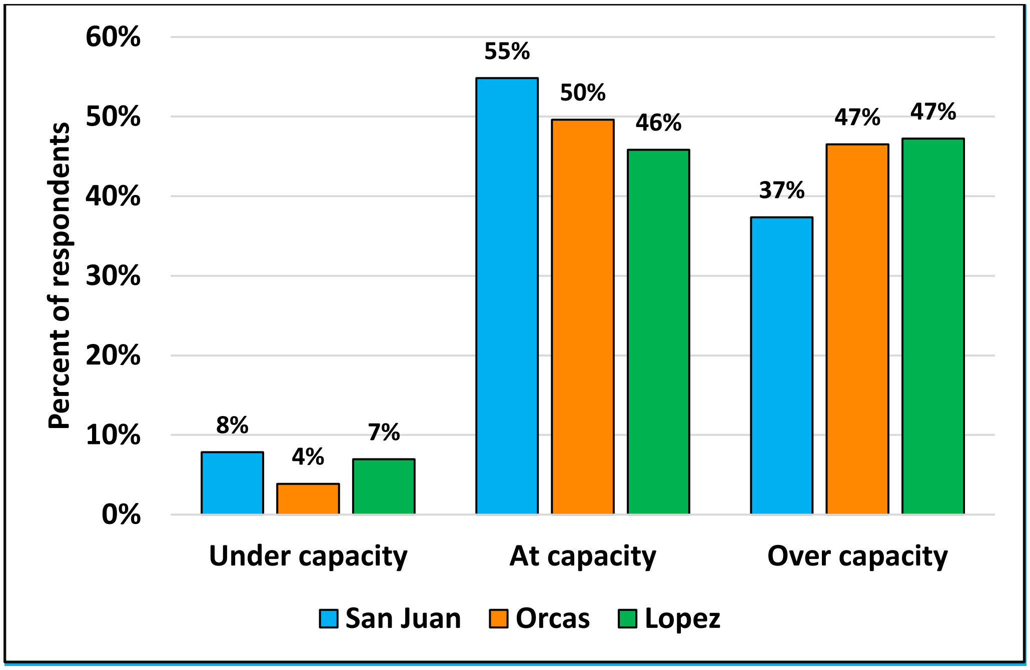

Figure 16. Capacity evaluations differences among islands (residents).

- Differences among islands were generally small; 92 to 96% report that summer visitation is at or over capacity.
- San Juan Island residents are slightly more likely to report "at capacity" and less likely to report "over capacity." This might reflect more tolerance for tourism impacts, or greater tourism infrastructure on San Juan Island to handle use.

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.

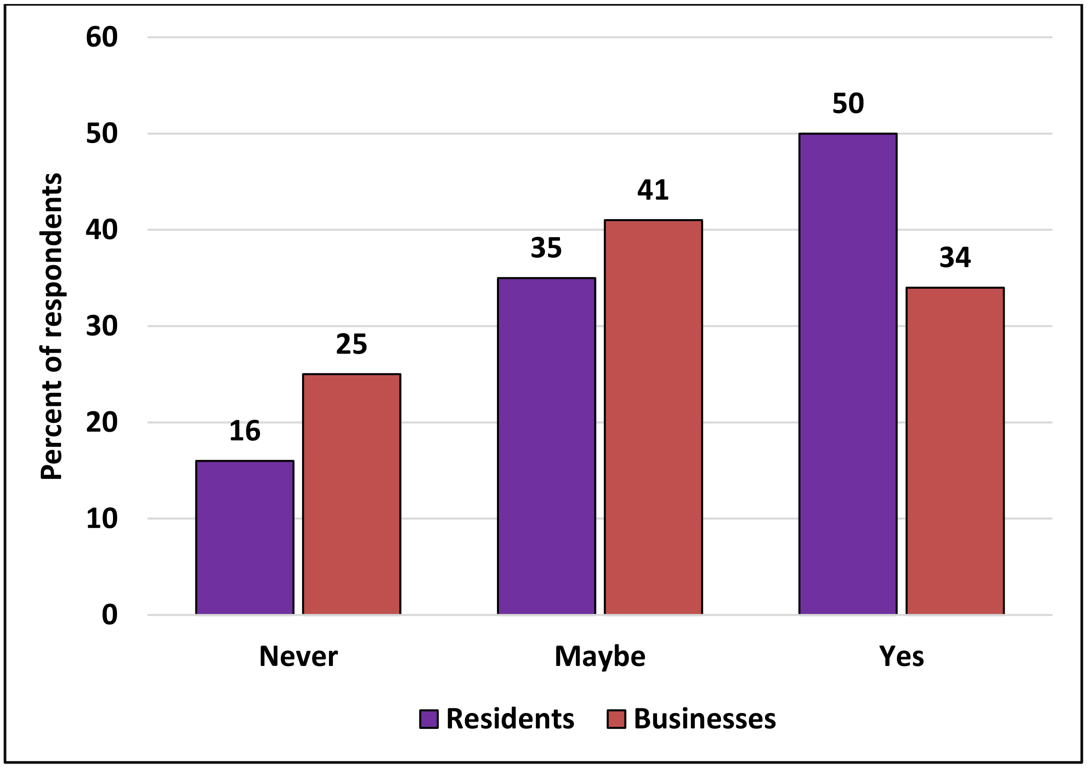

Figure 17. Support for limits on visitor numbers for residents and businesses.

- Half of residents said "yes" they would support measures to limit the number of visitors if visitation continues to increase, while 35% said "maybe." Taken together, 85% of residents are not opposed to limits, vs. 16% who said they would never support limits (totals do not sum to 100 due to rounding).
- In contrast, 34 percent of businesses would support limits, while 41% said "maybe." Taken together, 75% of businesses are not opposed to limits, vs. 25% who said they would never support limits. This is consistent with other results that show businesses are slightly more pro-tourism.
- People who report summer visitation is over-capacity were more likely to support or consider visitation limits (r = 0.54 for residents).

Support for limits on visitor numbers – Differences among islands

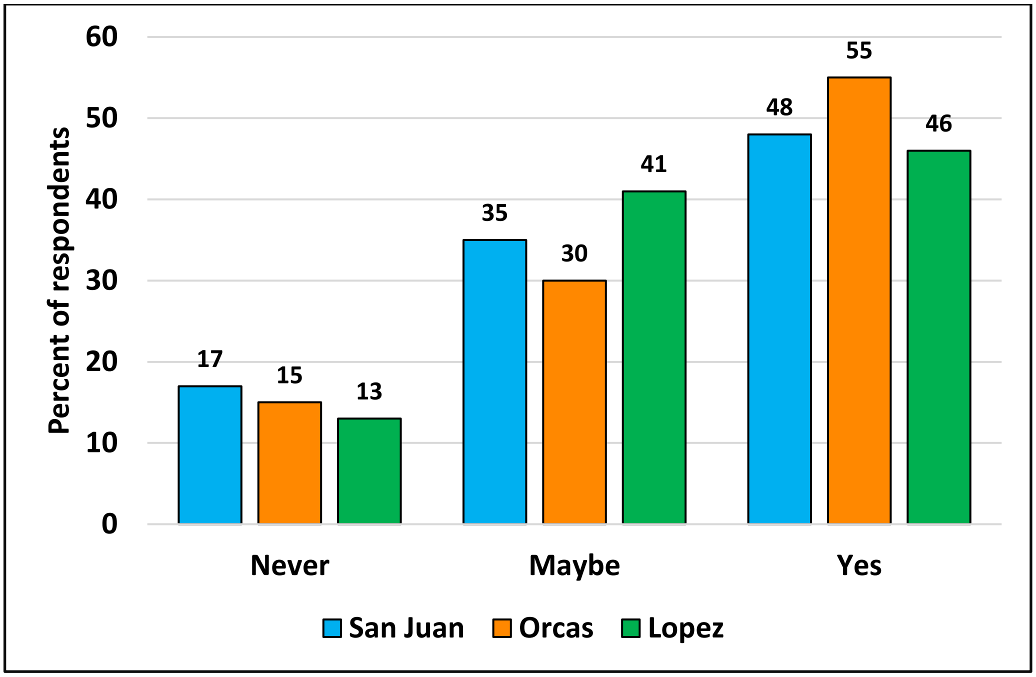

Figure 18. Support for visitation limits for residents on three main islands.

- Results show similar patterns among islands, with 83 to 87% saying “yes” or “maybe,” and 13 to 17% saying “never.”
- Differences among islands are generally small, but slightly more Orcas residents say “yes” and slightly more San Juan residents say “never.”

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

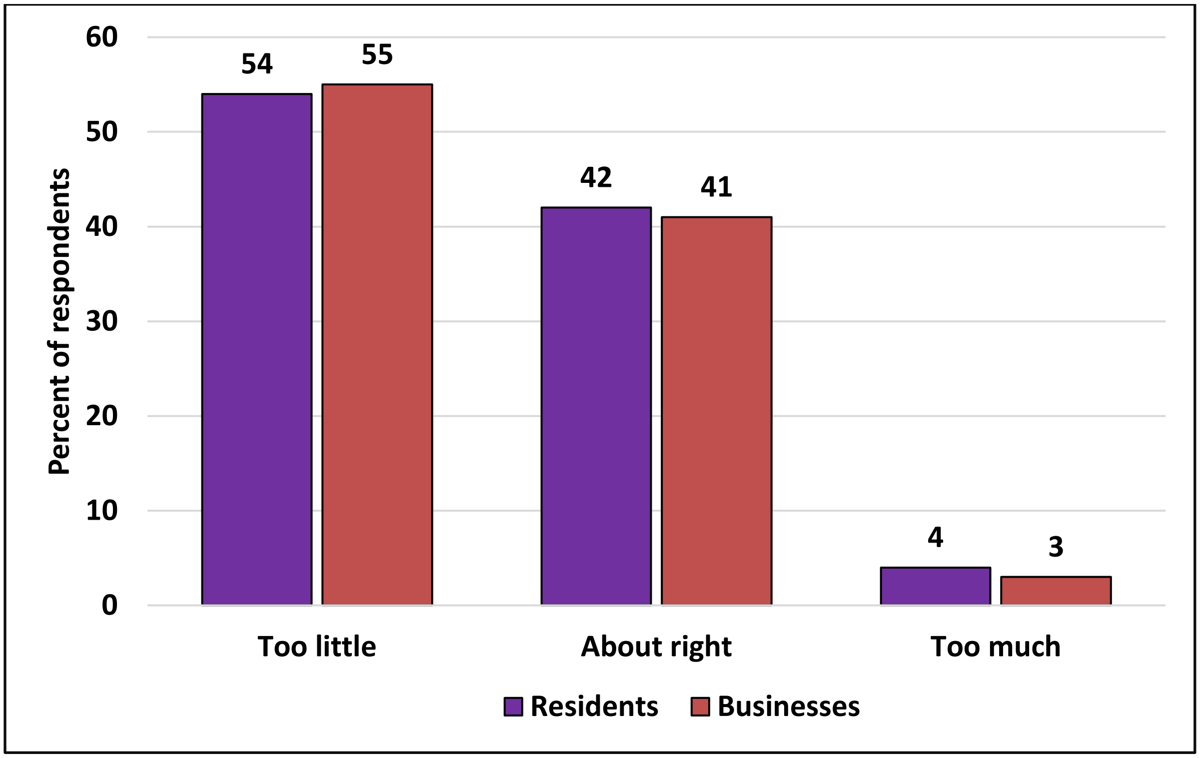

Figure 19. Appropriate levels of public land.

- Most residents (54%) and businesses (55%) say San Juan County has too little public land, while 40-42% report it is about right. Very few (3 to 4%) report too much.
- Residents and businesses were not statistically different.
- Among islands, 59% of Orcas residents said "too little" public land, compared to 52% for San Juan and 50% for Lopez. Orcas has two of the largest public parcels in the islands (Moran State Park at 5,424 acres and Turtle Mountain Preserve at 1,576 acres) but fewer public shore lands, which may help explain this finding.

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 reducing the number of ferries per week.	-2	-1	0	1	2

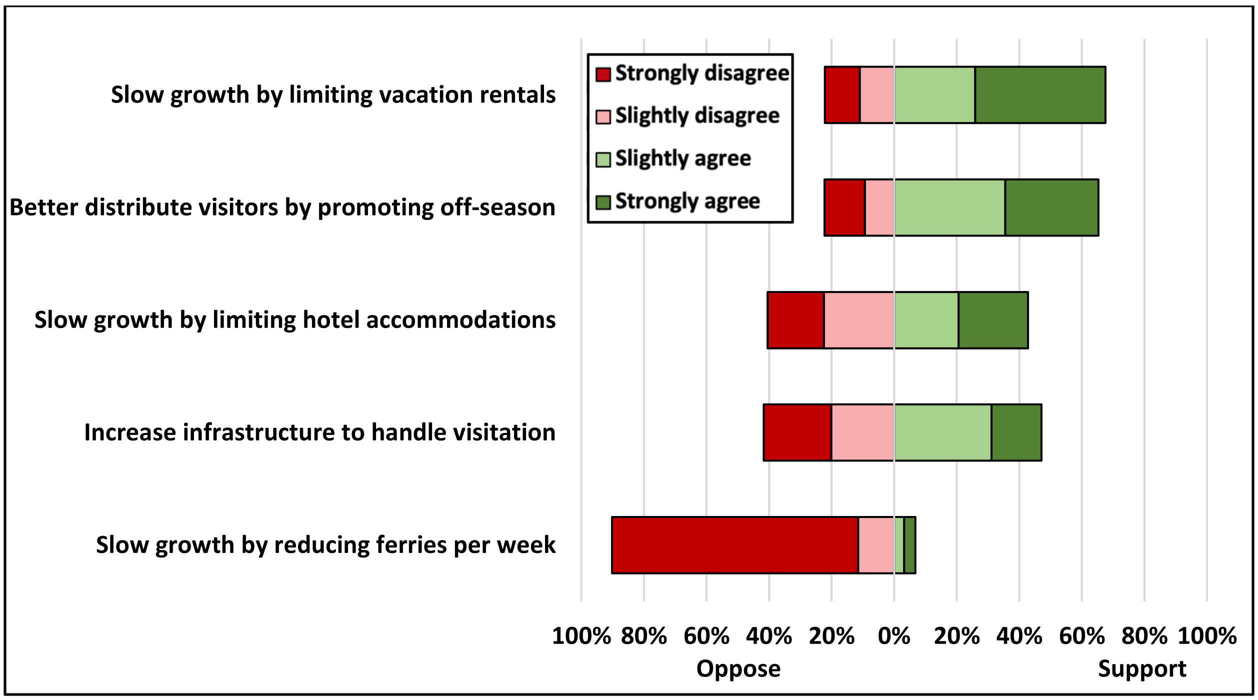

Figure 20. Residents' support for sustainable tourism approaches.

- Residents show majority support (and little opposition) for 1) slowing growth by limiting vacation rentals (68% support vs. 22% oppose) and 2) distributing visitors by promoting off-season use (65% support vs. 22% oppose).
- Opinion is more divided about 1) limiting hotel / resort accommodations (43% support vs. 40% oppose) or 2) increasing infrastructure to handle visitation (47% support vs. 42% oppose).
- There is strong opposition to slowing growth by limiting ferries (91% oppose vs. 7% support).

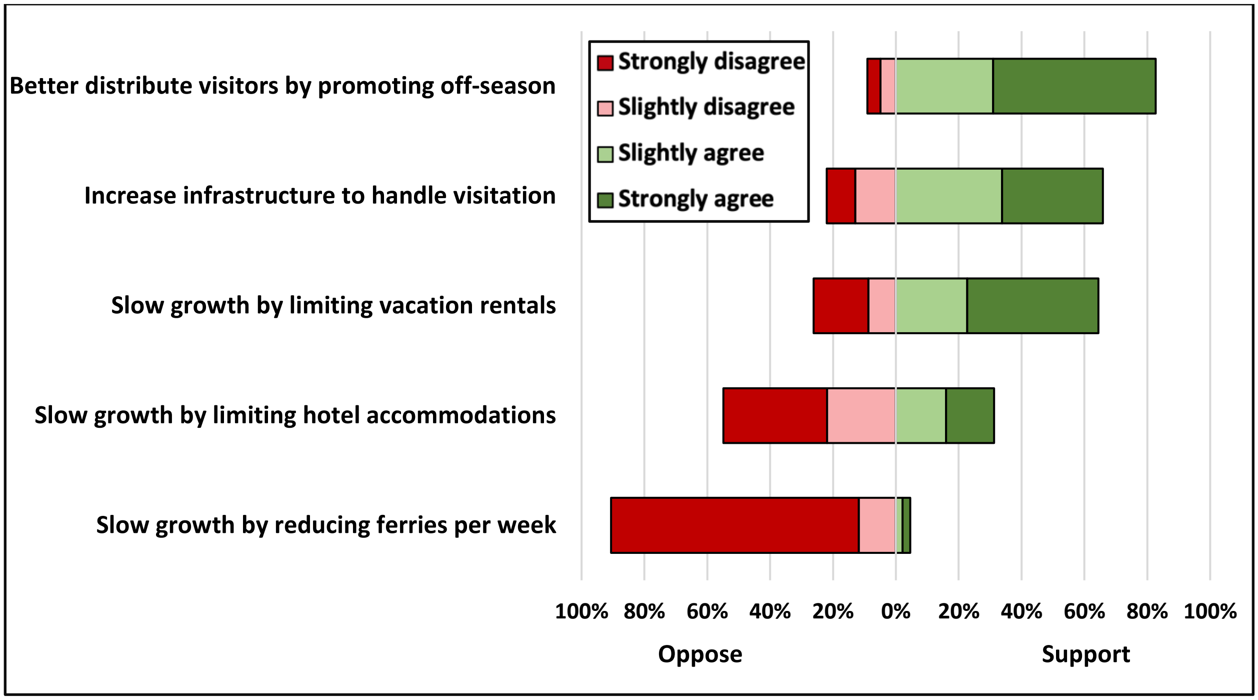

Figure 21. Businesses' support for sustainable tourism approaches.

- Businesses show majority support (and little opposition) for three approaches: 1) distributing visitors by promoting off-season use (83% support vs. 9% oppose); 2) increasing infrastructure to handle visitation (66% support vs. 22% oppose); and 3) slowing growth by limiting vacation rentals (65% support vs. 26% oppose).
- There is majority opposition for 1) limiting hotel / resort accommodations (66% oppose vs. 31% support) and 2) limiting ferries (91% oppose vs. 4% support).

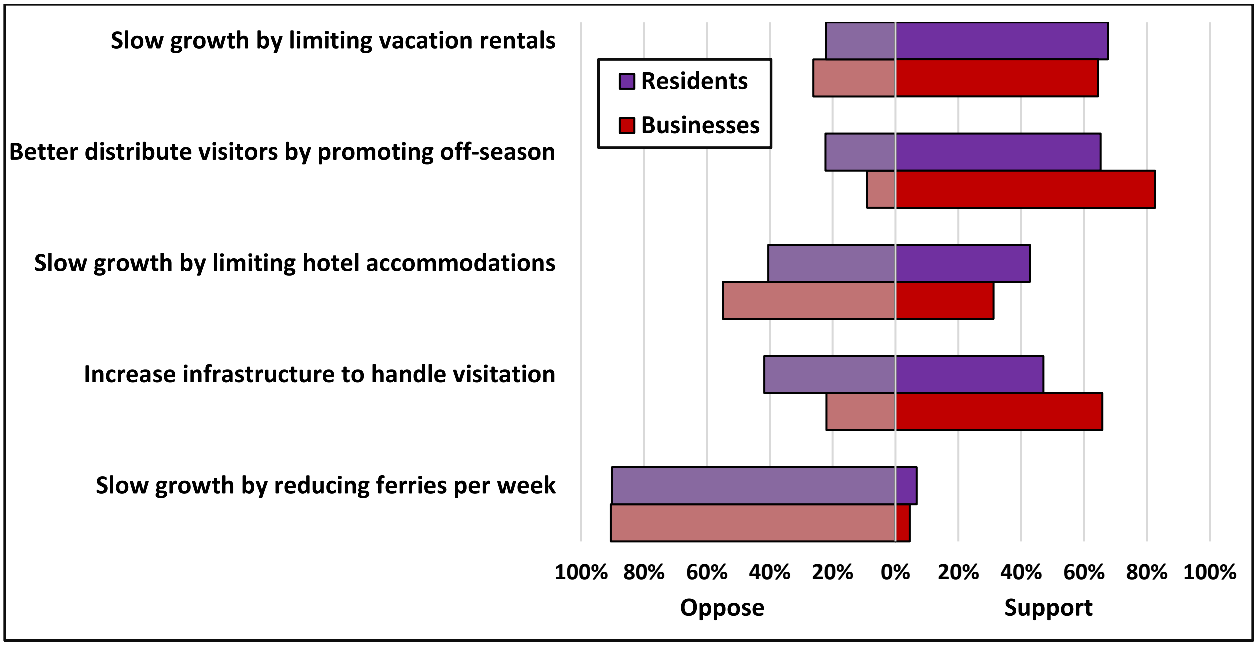

Figure 22. Comparing resident and business support for sustainable tourism approaches.

- Residents and businesses are similar in their support for limiting vacation rentals, and nearly unanimous opposition to reducing ferries.
- Businesses show more support than residents for distributing visitors by promoting the off-season, and increasing infrastructure to handle visitation (although more residents supported than opposed both approaches).
- Businesses differ in their majority opposition to limiting hotel accommodations (slightly more residents support than oppose this).
- These differences are instructive, but overall the two groups are more similar than one might expect.
- Reasons for similarities or differences are interesting to consider. For example, both groups support limiting vacation rentals. Resident concerns could include impacts from visitors staying in neighborhoods or VR expansion. Business concerns could include affordable housing impacts on seasonal labor, and competition in the accommodation market.

Sustainable approaches – Differences among islands

- There were a few small differences among islands for sustainable approaches.
  - More San Juan residents supported infrastructure to handle visitation (59% support for San Juan vs. 47% for Orcas and 45% for Lopez).
  - Fewer San Juan residents (46%) support limiting hotels compared to Lopez (60%).
  - Orcas residents are slightly more likely to support limits on VRs (83%) than San Juan (70%) and Lopez (76%).
  - Lopez residents (69%) are less likely to support distributing use to the off-season than San Juan (78%).

Sustainable approaches – Differences between new and longer-term residents

- More new residents support increasing infrastructure to handle the level of visitation (61% vs. 44% for longer-term; $t=3.2$, $p<.001$).
- Fewer new residents support limiting the number of VRs (56% vs. 70% for longer-term; $t=-2.6$, $p<.001$).

Support for and prioritization among specific 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. *(Circle one number per row).*

				I support this and it should be a…		
	Strongly oppose	Slightly oppose	No opinion	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 (trolleys, vans, or bike sharing) to reduce traffic congestion.	-2	-1	0	+1	+2	+3
Education about car-bike etiquette to reduce traffic conflicts.	-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
Provide information about less-used areas to spread out use.	-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 and enforcement about dog-walking etiquette.	-2	-1	0	+1	+2	+3
Manage number / timing of commercial kayaking groups.	-2	-1	0	+1	+2	+3
Manage number / timing of commercial bicycling groups.	-2	-1	0	+1	+2	+3
Develop more exhibits at attractions.	-2	-1	0	+1	+2	+3
Increase tent camping opportunities.	-2	-1	0	+1	+2	+3
Increase RV camping opportunities.	-2	-1	0	+1	+2	+3
Reduce tourism promotion.	-2	-1	0	+1	+2	+3
More development to accommodate increased visitation.	-2	-1	0	+1	+2	+3
Limit visitation to the islands.	-2	-1	0	+1	+2	+3
Reserve some space on summer ferries for residents' vehicles.	-2	-1	0	+1	+2	+3
Create residents-only parking areas in Friday Harbor or Eastsound – usable only by vehicles with permit stickers.	-2	-1	0	+1	+2	+3
Allow congestion and crowding to increase.	-2	-1	0	+1	+2	+3
Develop off-road trails for pedestrian, bike, and equestrian use	-2	-1	0	+1	+2	+3
Manage the number and practices of whale-watching vessels to minimize their impacts on resident orcas.	-2	-1	0	+1	+2	+3
Other (please list)						

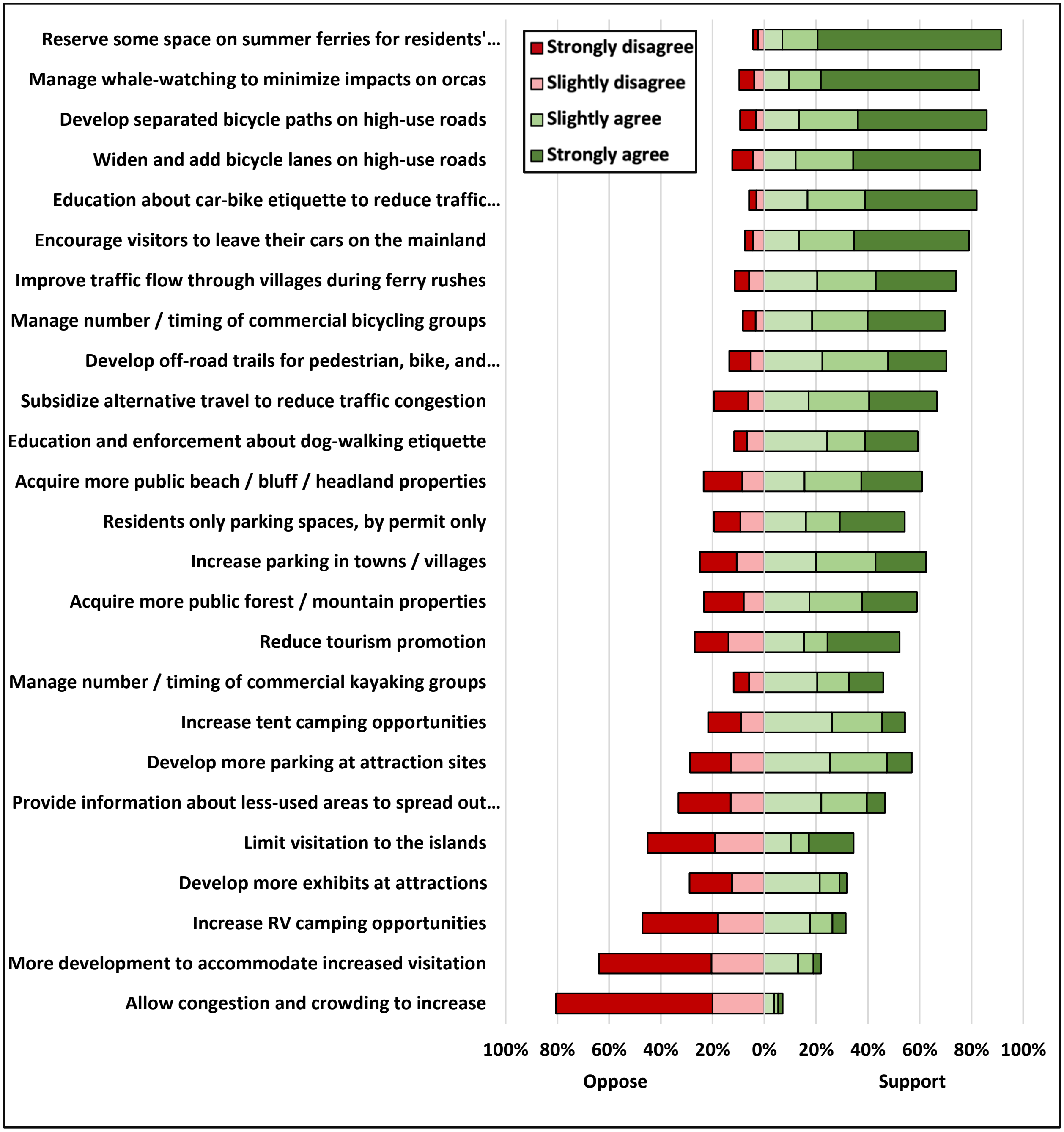

Figure 23. Residents' opinions about specific management actions.

- Residents showed majority support for 18 of 25 management actions, and more support than opposition for four more. Three had more opposition than support (two with majority opposition).
- The highest priority actions included 1) adjustments to the ferry system to favor residents; 2) increased whale-watching management; 3) several biking infrastructure and management actions; 4) addressing village congestion and parking; and 5) acquiring more public land.
- Residents showed majority opposition to allowing congestion and crowding to increase, and more development to accommodate visitation (these are more general approaches than specific actions).

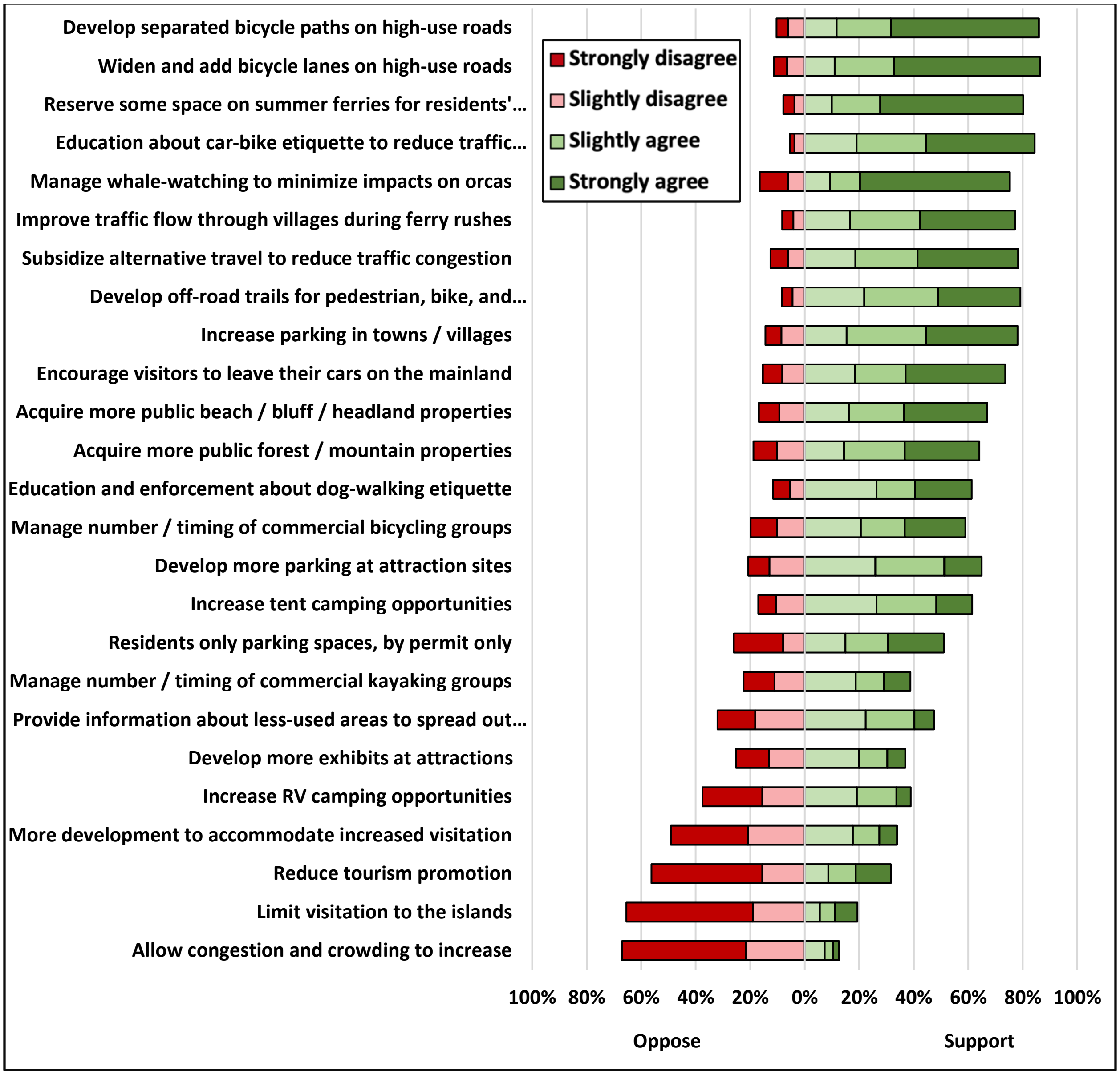

Figure 24. Businesses' opinions about specific management actions.

- Businesses showed majority support for 17 of 25 management actions, while three had majority opposition.
- The highest priority actions included 1) several biking infrastructure items; 2) reserving space on ferries for residents; 2) increasing whale-watching management; 4) addressing village congestion and parking; and 5) acquiring more public land.
- Businesses showed opposition to more development to accommodate visitation, reducing tourism promotion, limiting visitation to the islands, and allowing congestion and crowding to increase.

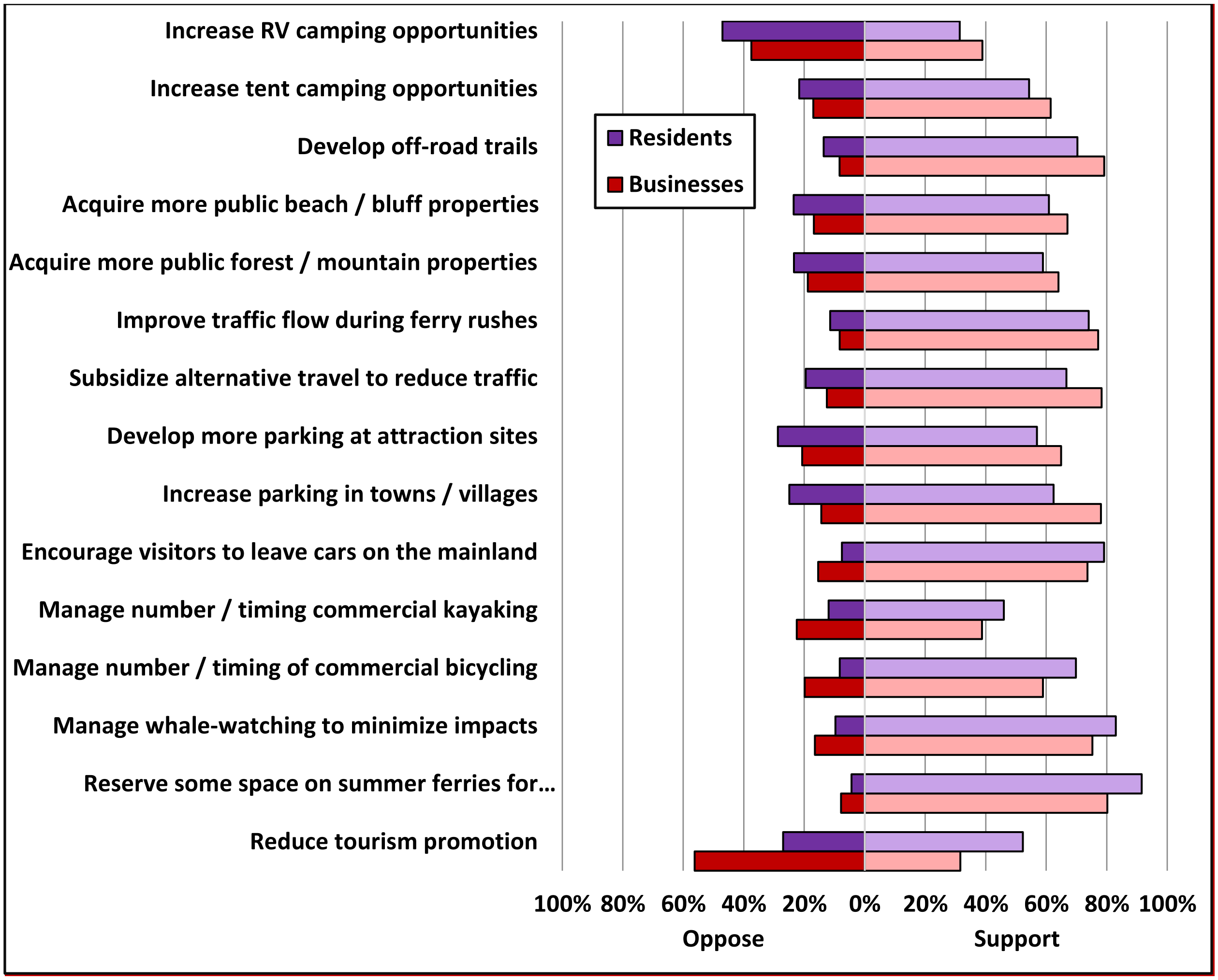

Figure 25. Residents vs. businesses' opinions about specific management actions.

(Statistically significant differences only)

- There were statistically significant (but generally small) differences between residents and businesses for 15 of the 25 actions.
- The two groups had opposing positions for only one action (reducing tourism promotion), which most residents support while most businesses do not.
- Businesses were slightly more likely to support development actions (e.g., increase RV and tent camping, off-road trails, parking at attraction sites and in villages), which fits with a "build infrastructure" approach to increasing tourism.
- Businesses showed slightly greater support for public land acquisition.
- Businesses were slightly more likely to support subsidies for alternative transportation, encouraging visitors to leave vehicles on the mainland, and improving traffic flow during ferry rushes. These actions might allow more visitation while minimizing impacts in business districts.
- Residents were slightly more likely to support increased management of commercial whale-watching, bicycling, and kayaking groups, along with reserving space on ferries for residents.

Specific management actions – differences among islands

- Residents showed small differences among islands for 14 of the 25 management actions. In all but one case, the differences were a matter of degree and would not change conclusions about support (as described above). However, there were interesting patterns that are consistent with conventional wisdom, as summarized below.
    - For adding parking in villages, at attraction sites, and handling ferry rushes, San Juan residents showed more support than Orcas, which showed more support than Lopez. This fits with the parking and congestion problems in Friday Harbor vs. Eastsound vs. Lopez Village.
    - For encouraging visitors to leave their vehicles on the mainland, San Juan and Orcas showed more support than Lopez.
    - Lopez residents showed more support for vehicle-biking etiquette education than San Juan or Orcas; this may reflect greater biking use on Lopez (particularly on shared rural roads).
    - San Juan and Orcas showed more support for separate bike trails than Lopez, probably because Lopez has lower traffic densities.
    - San Juan residents showed more support for managing commercial kayaking groups, but Orcas and Lopez showed more support for managing bike groups and whale watching.
    - Orcas and Lopez showed more support for reserving space on ferries for residents, while San Juan and Orcas showed more support for resident-only parking areas in villages.
    - San Juan residents showed more support for additional tent and RV camping; there are currently many more camping sites on Orcas (Moran State Park) and Lopez (Spencer Spit State Park and Odlin County Park).

Specific management actions – Comparing residents to visitors

- There are small but statistically significant differences between residents and visitors (from 2017 ferry survey) for 11 of the 21 actions that were listed on both surveys.
- Visitors showed slightly less support for encouraging visitors to leave their vehicles on the mainland (70% vs. 80%).
- Visitors showed slightly less support for limiting visitation to the islands (24% vs. 34%).
- Visitors showed slightly more support for managing commercial kayak groups, developing parking at attraction sites, increasing development to handle the level of visitation, acquiring beach and forest properties, increasing tent camping opportunities, and providing better information to visitors to spread out use. Differences generally ranged from five percent for the first few items in this list to about 10 percent for the last.

Targets for tourism promotion

The San Juan Islands Visitor Bureau promotes the islands to increase tourism. Please tell us whether you think they should do more, less, or about the same level of promotion targeting each of the following groups.

	Much less	Slightly less	About the same	Slightly more	Much more
Package / tour groups	1	2	3	4	5
Independent travelers (not in tour groups)	1	2	3	4	5
Businesses and conference tourists	1	2	3	4	5
Outdoor recreation/adventure-based tourists	1	2	3	4	5
Arts-oriented tourists	1	2	3	4	5
Food-oriented tourists	1	2	3	4	5
Farm-holiday or agri-tourists	1	2	3	4	5
Education-oriented tourists (such as Road Scholars, schools, or elder hostel)	1	2	3	4	5
History/heritage-oriented tourists	1	2	3	4	5
Visitors during the summer season	1	2	3	4	5
Visitors during the off-season	1	2	3	4	5

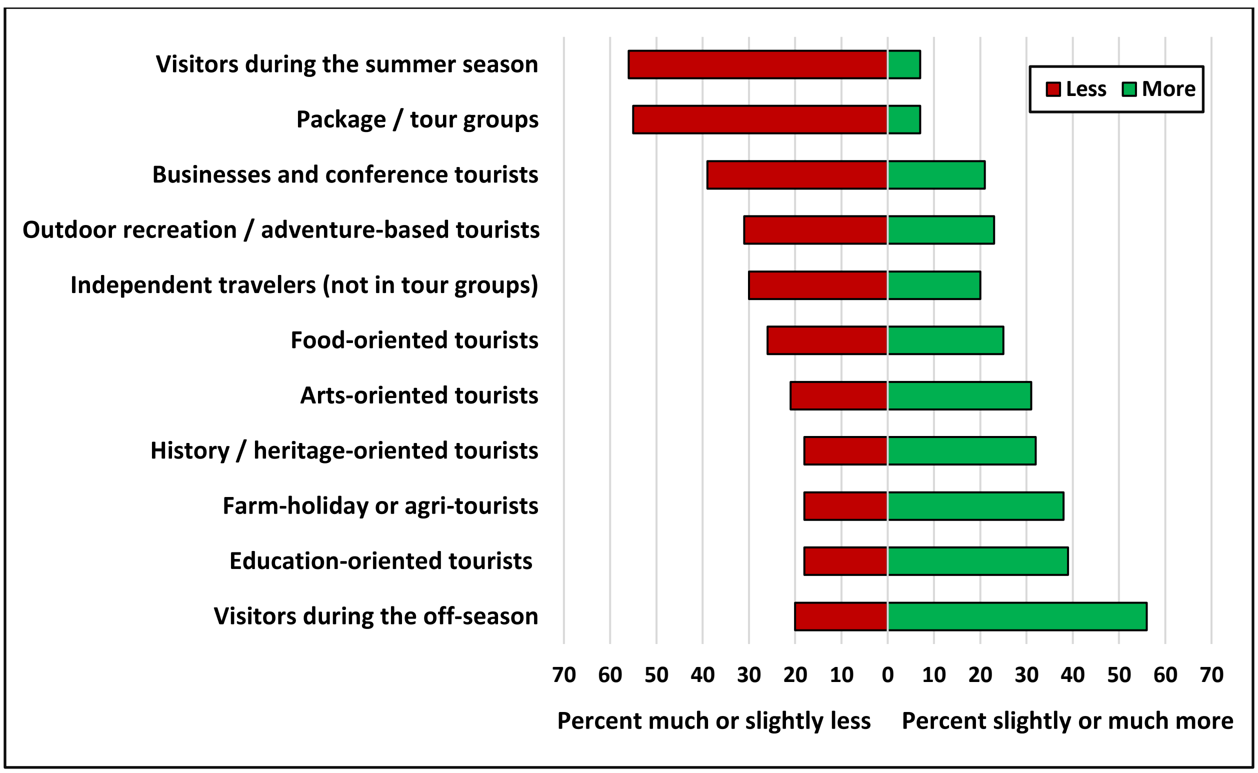

Figure 26. Residents' preferred targets for tourism promotion.

- Majorities of residents wanted to reduce promotion targeting summer visitors and package / tour groups.
- The only majority support for increased promotion was for off-season visitors.
- There were higher percentages for more than for less for promotion targeting education-oriented, farm holiday, history, and arts-oriented visitors.
- In contrast, there were higher percentages for less rather than more promotion targeting business/conference, outdoor recreation, independent, and food-oriented tourists.

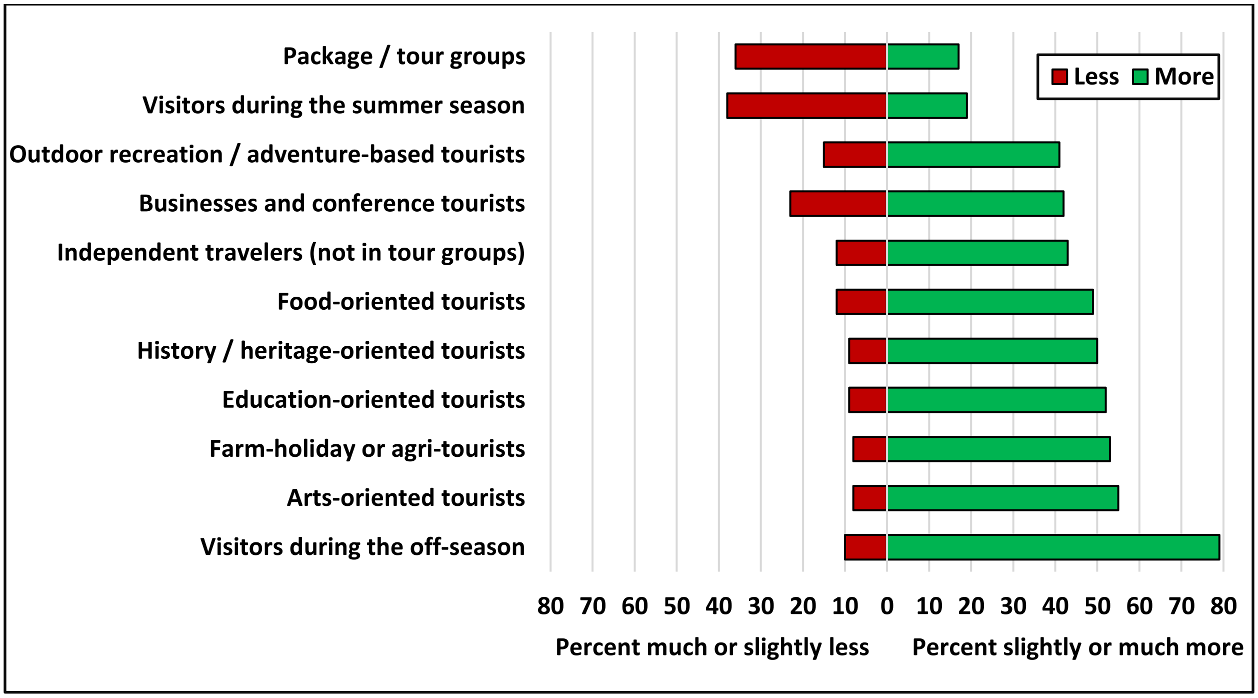

Figure 27. Businesses' preferred targets for tourism promotion.

- In general, businesses were more willing to support increased promotion.
- There was majority business support for targeting off-season, arts-oriented, farm-oriented, education-oriented, and history-oriented visitors.
- There were higher percentages for more rather than less food-oriented, independent, business/conference, and outdoor recreation tourists.
- Pluralities preferred less rather than more promotion for package/tour groups and summer visitors (agrees with residents).

Preferred targets for tourism promotion – Differences among islands

- San Juan Island residents were more likely to support promotion for the following groups.
  - Package tourists (42% “more” for San Juan vs. 20% for Orcas and Lopez together).
  - Business/conference tourists (79% “more” for San Juan vs. 52% for Orcas and Lopez together).
  - Independent tourists (80% “more” for San Juan vs. 73% for Orcas and Lopez together).
- Orcas residents are less likely to support promotion for education-oriented tourists (74% vs. 89% for San Juan and Lopez). Although speculative, this may reflect concern over impacts from the large scout camp (Camp Orkila) or other education-based groups that use Moran State Park, with well-known congestion issues from camp change-over days and highly-visible “off campus” bus trips.

Ferry use and reservations

Frequency of trips to the mainland

About how often do you take round trip ferries to Anacortes?	
Trips per month in summer (June, July, and August)	_____ round trips per month
Trips per month during the rest of the year (September thru May)	_____ round trips per month

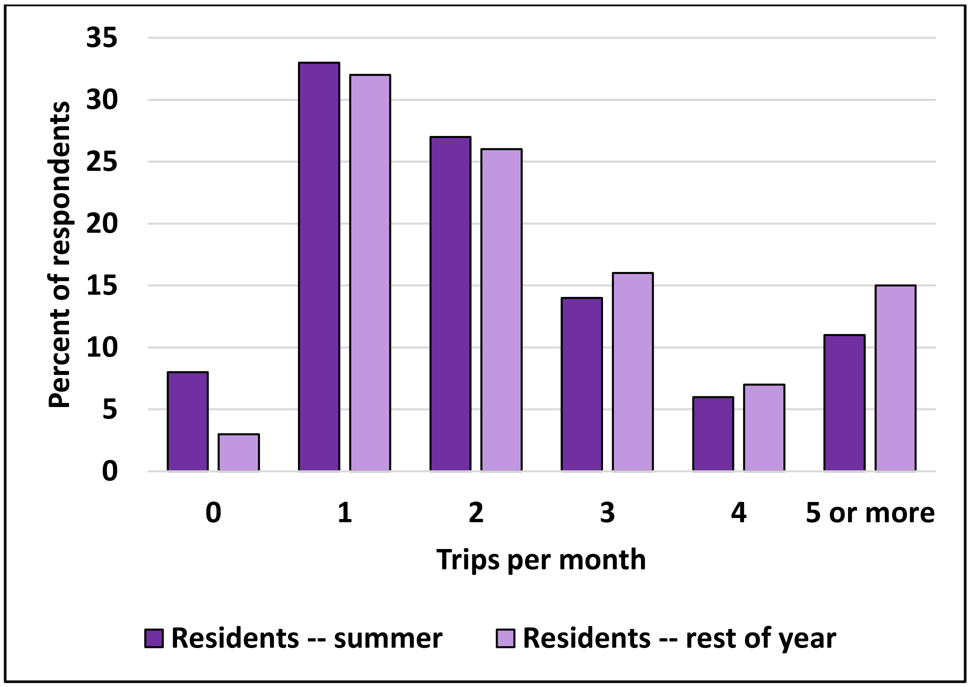

Figure 28. Ferry trips to mainland (residents).

- About 60% of residents report one to two round trips per month to Anacortes, with little difference between summer and the rest of the year.
- A few (11 to 15%) report five or more trips per month.
- Differences between residents and businesses (not shown) were small. In summer, residents averaged 2.4 trips per month vs. 2.2 for businesses; the rest of the year, residents averaged 3.0 vs. 3.4 for businesses.

Reservation frequency

When making trips to and from Anacortes during the summer, about how often do you make a reservation? ❑ Never ❑ <25% of the time ❑ 25-75% of the time ❑ >75% of the time ❑ Always

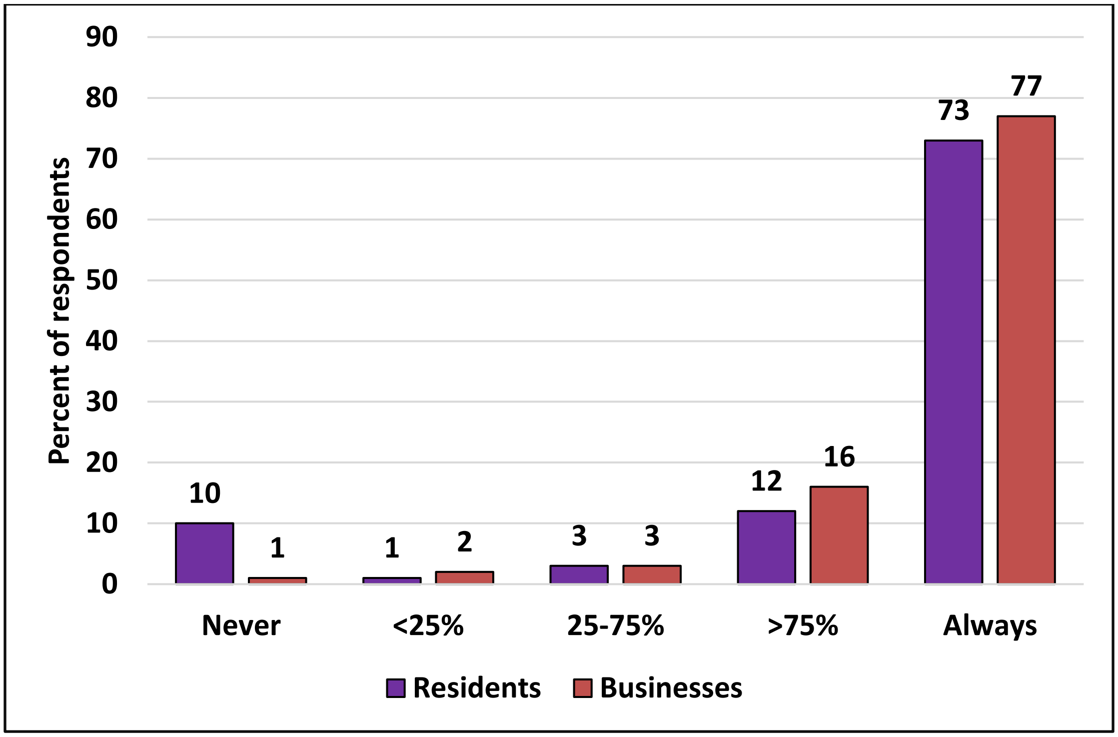

Figure 29. Frequency of reservations on ferries in summer.

- About three quarters of residents and businesses say they always make reservations on ferries in summer, and another 12 to 16% make reservations 75% of the time.
- About 10% of residents and 1% of businesses never make reservations.
- San Juan and Orcas residents are more likely to make reservations (90 to 94% do so 75-100% of the time, compared to 73% on Lopez). The question acknowledges that reservations are currently unavailable from Lopez to Anacortes.

Evaluating the ferry reservation system

Does the system favor residents or visitors?

When traveling to and from Anacortes from your island by ferry during the summer, do you feel the reservation / waiting system is better for residents or visitors? (Check one) ❑ The reservation system favors visitors ❑ The reservation system favors residents ❑ The reservation system works similarly for both visitors and residents

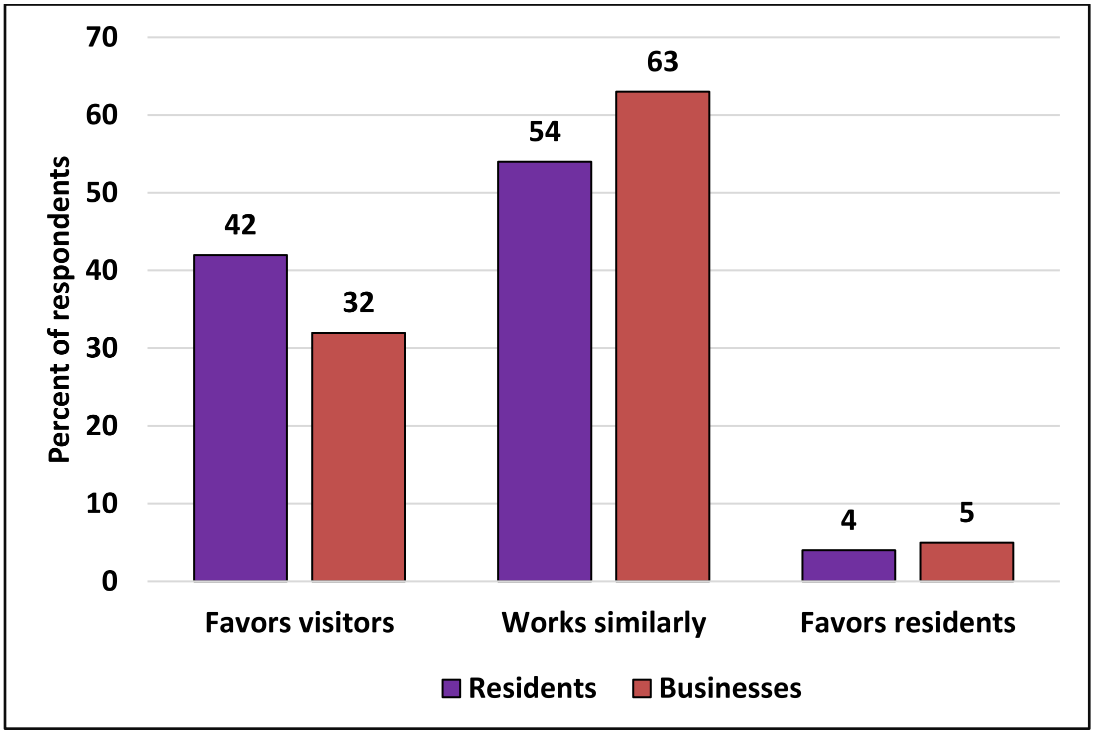

Figure 30. Perceived fairness of ferry reservation system.

- Most (54 to 63%) residents and businesses report the ferry reservation system works similarly for residents and visitors.
- However, 42% of residents and 32% of businesses say it favors visitors, while 4 to 5% say it favors residents. Comments suggest some respondents believe residents take more trips to the mainland on short notice, while visitors tend to have longer planning horizons.

Reported reservation success

When you make reservations for trips to Anacortes during the summer, what percent of time do you get...

…your first choice date and time	_____ percent
…your first choice date but at a different time	_____ percent
…a different date than my first choice	_____ percent

OR...

❑ Check here if you don't typically make reservations

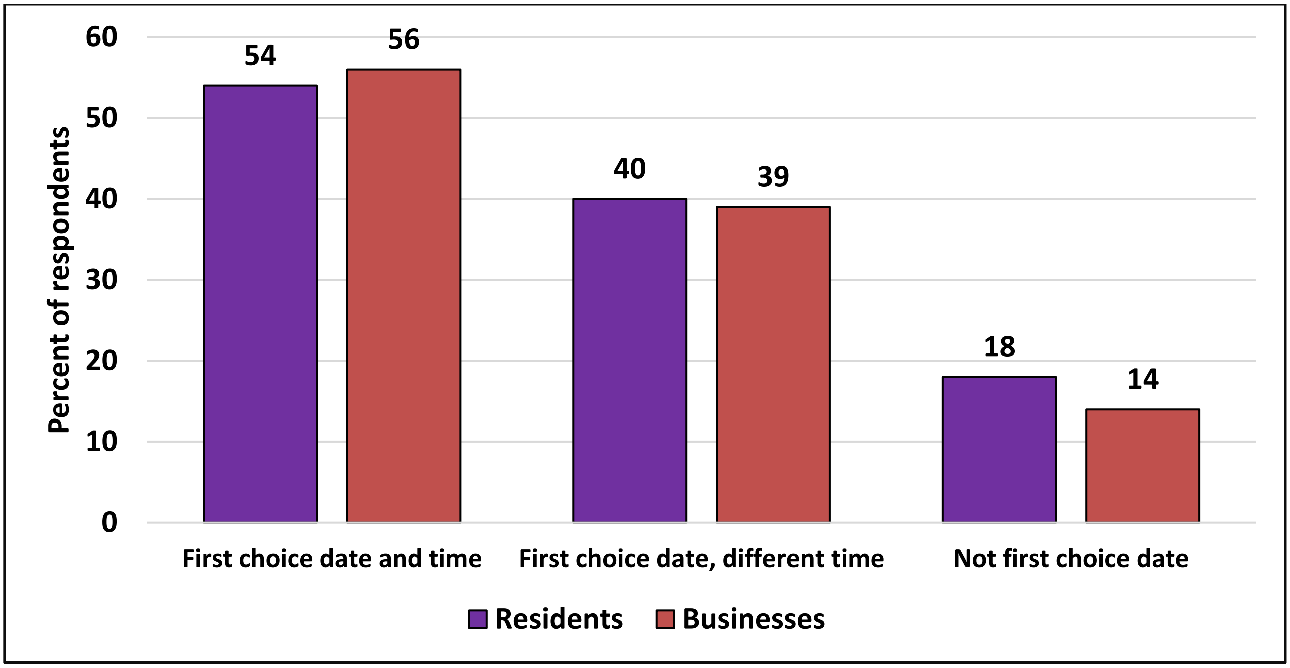

Figure 31. Reported success with ferry reservations.

- Among those who use the reservation system, 54 to 56% get their first choice date and time, and 39 to 40% get their first choice date at a different time.
- Summing across the three responses is misleading because the question allowed people to estimate percentages independently for each outcome. But only 18% of residents and 14% of businesses reported settling for a different reservation date, so those who use the system appear to get their preferred trip dates more than 80 percent of the time.
- Differences between businesses and residents were small.
- There were small differences among islands (not shown in a table or graph). Lopez residents report getting their first choice date and time more often (61%) than Orcas or San Juan (51 to 54%).

- There were ***substantial differences between residents and visitors.*** Although both groups make reservations at about the same rate (over 70% of the time), visitors report more success (about 78% get first choice date and time vs. 54% of residents. Similarly, only 3% of visitors reserved a different date, compared to 18% of residents. These results fit with residents' perceptions that reservations favor visitors (described above).

Reasons for not using reservation system

When you don't use the reservation system, which of the following reasons explain why? *(Check all that apply)*

❑ I don't know how to use the reservation system.
❑ The reservation system is too complicated.
❑ Reservations generally are not available.
❑ My schedule is too uncertain.
❑ I know there will be space on the ferry I desire.
❑ The ferry doesn't take reservations (Lopez Island only).
❑ I walk-on because I keep a vehicle in Anacortes.
❑ I walk-on because I use other transportation in Anacortes.
❑ I don't mind waiting in line for space on the ferry.
❑ I don't mind missing a ferry, because I know there will eventually be space for my vehicle.
Other – please specify: ______________________________

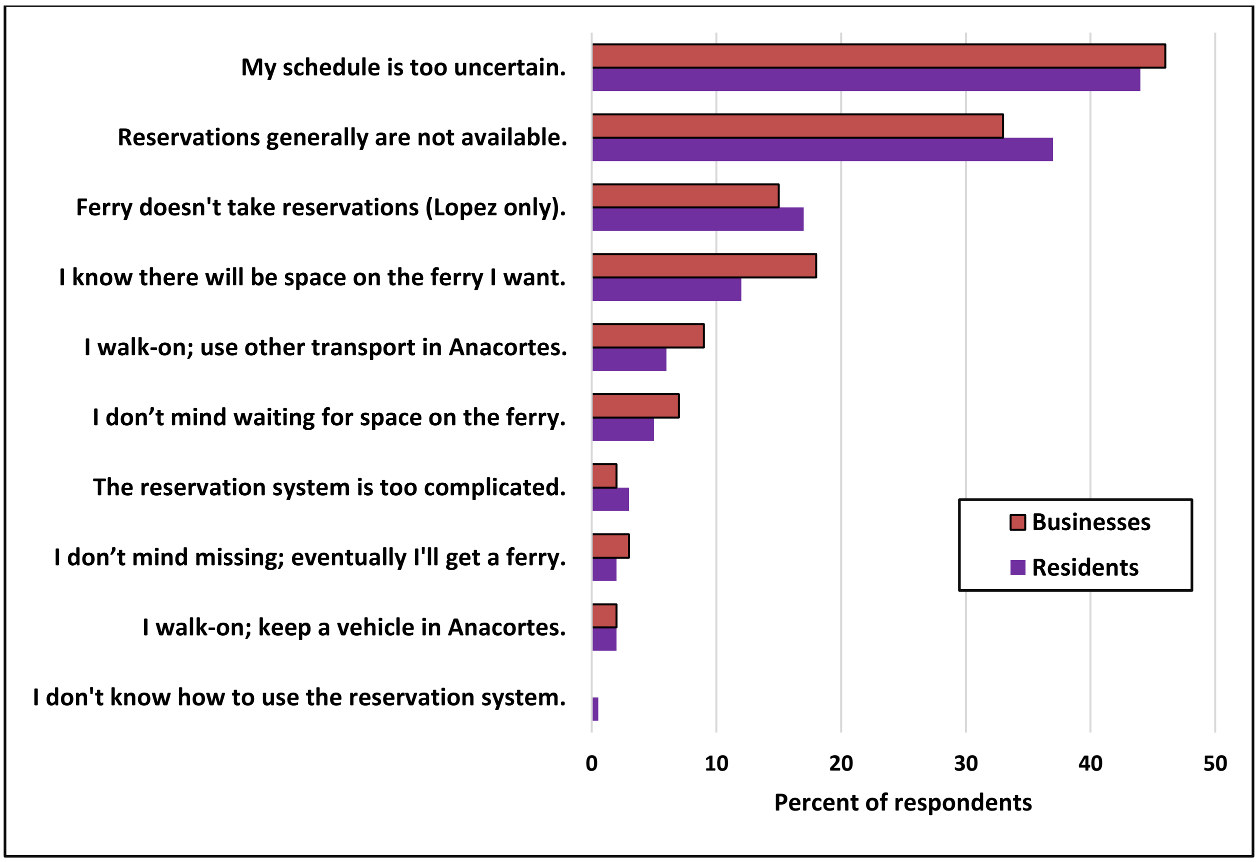

Figure 32. Reasons why people don't make reservations.

- Among those who don't make reservations, the most common reason is an uncertain schedule (44 to 46%), although 33 to 37% report that reservations are not available.
- About 15 to 17% say they know there will be space on the ferries they choose (perhaps at off peak hours, although the question didn't specify).
- About 5 to 7% say they don't mind waiting in line for space.
- Only 1 to 3% said they do not know how to use the reservation system or it is too complicated.
- Few report having alternative transportation in Anacortes (2% keep a vehicle there, and 9% of businesses and 6% of residents use other transportation).
- There were few differences among islands.
    - In general, San Juan and Orcas were similar, while Lopez was different.
    - Nearly all the responses to "ferry doesn't allow reservations" were from Lopez; this is true for ferries from Lopez to Anacortes, as acknowledged in the question.
    - Lopez residents were more likely to have uncertain schedules (65% vs. 41 to 42% for San Juan and Orcas).
    - Lopez residents were less likely to report reservations were not available (26% vs. 41 to 42% for San Juan and Orcas).