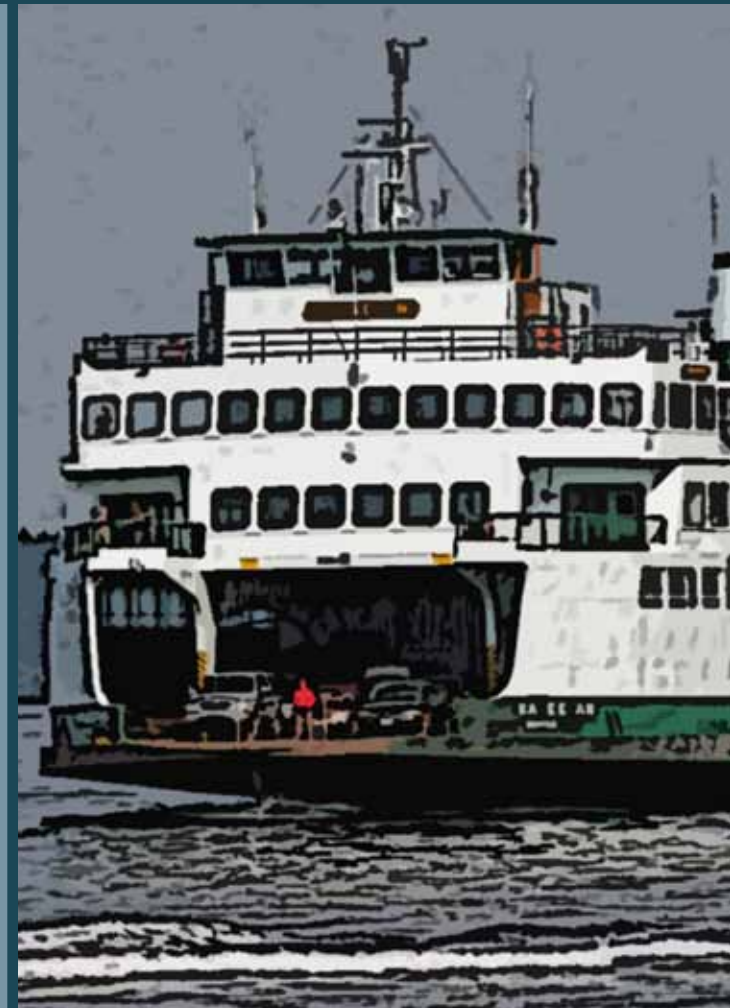


**UNDERSTANDING AND
ACCOMMODATING
SAN JUAN ISLANDS
SCENIC BYWAY VISITORS**

5





The calm, peachy sky meets the rolling hills of the islands.

Visitors to the San Juan Islands...

have needs and expectations that relate to the experiences they hope to enjoy, as well as the availability of accommodations, facilities, and services to support their visit. This section summarizes visitor characteristics, needs, and interests, and describes available accommodations, facilities, and services for visitors. It also provides recommendations to the byway partnership for more effectively managing byway visitation and better serving visitors, in some cases through new accommodations, facilities, and services.

San Juan Islands Scenic Byway Visitor Profile

Developing strategies to enhance visitor experience and manage byway visitation requires a strong understanding of existing visitor characteristics, interests, and needs, as well as visitation patterns and statistics. The information on the following pages provides insights into the typical byway visitor, including those who come to the San Juan Islands periodically for rest and relaxation, as well as those who live in the San Juan Islands and travel the byway more frequently.

Residents of the San Juan Islands

Residents of the San Juan Islands (including permanent home and second/vacation home owners) are regular “visitors” of the byway and important local stakeholders. They travel the byway routes and visit destinations along the byway on a daily basis. Their lifestyles are greatly affected by tourism patterns, particularly by ferry schedules and how well visitors are directed, managed, and accommodated by the local infrastructure.

Residents’ Perspectives & Interests

Many people choose to live in the San Juan Islands because of the sense of peace

and isolation, the immediate availability of nature and recreation opportunities, and the surrounding scenic beauty. They are also drawn to the small town pace, rural lifestyle, and strong sense of community. These are the same qualities that draw visitors to the islands. But with more people coming to the islands, these qualities are at risk. This is why most residents in the islands are deeply committed to living sustainably and managing tourism effectively to avoid impacts to natural resources and the local quality of life.

CONNECTING VISITORS TO THE CULTURE OF THE ISLANDS

“It is not enough to just get people here to spend money in our local businesses.

Visitors need to feel more connected, have richer experiences, and be inspired to engage in actions and activities that are consistent with a more sustainable way of island living.”

– Scenic Byway public workshop participant



Residents of the islands provided input about the scenic byway at public meetings and through an online survey conducted during the planning process. Many recognized tourism’s importance to the health of the local economy, but also expressed concerns about making sure tourism is well managed. For example, residents frequently aired their concerns about increasing levels of ferry-related traffic congestion during the peak summer months and the need to encourage and accommodate car-free visits to the islands and travel by alternative modes (shuttle/public transportation, bicycling, and walking). Many participants in the planning process and public meetings expressed the need to expand local transit service on the islands, as well as the need to improve local roads to more safely accommodate bicyclists, transit use, and pedestrians, and for multi-use trails to connect communities and destinations throughout the islands. *“Residents and visitors should be able to get anywhere along the byway without a car if they choose.”* –public workshop participant

Other strong interests expressed by island residents include the following:

- Use the ferry ride as an opportunity to provide education and interpretation about the islands, and to stress the importance of sustainability and stewardship as part of the visitor experience.
- Encourage more visitation during the shoulder and off seasons to spread out the tourism benefits and help diversify and bolster the local economy.
- Preserve and enhance public access to the water, particularly for hand-launched/nonmotorized boating (kayaking, canoeing, sailing, etc.).

- Connect visitors with the natural and cultural heritage of the islands thoughtfully and strategically by providing access to local farms and agricultural operations as well as artist studios, and by preserving and interpreting historic buildings and cultural landscapes.
- Provide more scenic viewpoints – formally designated locations for enjoying scenic views and photographing island scenery.
- Continue to preserve undisturbed wildlife habitat areas, with well-managed, limited access to visitors and interpretation/education so visitors understand the value and risks to these sensitive ecosystems.
- Promote lower-impact activities that are sustainable both environmentally and economically.
- Engage the community in developing, promoting, and caring for the byway.

In November 2009, San Juan County conducted a random sample community survey to support the development of the *Parks, Trails and Natural Areas Plan*. The results of this survey provide insights into residents’ perspectives. A high percentage of respondents (98 percent) indicated that parks, trails, and natural areas are important to their community’s quality of life.

In addition, a majority of respondents indicated that there is not enough public land managed for conservation and public use (59 percent of the Orcas Island and San Juan Island respondents). When asked about the most important factors related to land conservation, respondents indicated the following top reasons shown above right.

TOP REASONS FOR LAND CONSERVATION

1. Protect wildlife habitat
2. Preserve local biodiversity
3. Provide spaces for solitude and enjoyment of nature
4. Protect views and vistas
5. Provide hiking and biking trails
6. Preserve farm lands



Protecting wildlife habitats is the most important factor related to land conservation according to respondents.

Visitation Levels and Seasonal Patterns

Overall, annual visitation to the San Juan Islands is difficult to measure exactly. However, several sources of information and statistics provide insights into the annual influx of visitors and its significant affect on the local economy.

- San Juan County’s population of approximately 16,000 year-round residents increases substantially during the summer months. The County estimates that the summer resident/vacation home/hotel night population swells to double the year-round population on any given summer date. (This does not include overnight visitors who stay in informal accommodations such as house guests or campground stays, nor does it include day visitors.)
- Some estimates put the average annual number of visitors (non-resident) to the islands at between 750,000 and 1,000,000 and sometimes approaching 1,500,000. This is approximately 50 to 90 times the local year-round population.
- According to the Washington State Office of Financial Management, average annual visitation to all state parks in San Juan County typically ranges from around 1,300,000 to around 1,600,000. This includes visitation to more than fifteen sites managed by Washington State Parks in the islands—Moran State Park on Orcas, Lime Kiln Point State Park on San Juan, and various other smaller parks and marine parks on other islands. State parks visitation in the County reached a high of 2.24 million in 2004. Visits are calculated as visitor “days”—one visitor’s presence during a single day in a state park. Moran State Park visitation reaches to nearly 700,000 annually (including travelers passing through the park) and Lime Kiln Point State Park visitation is typically above 200,000. (Source: Dean Runyan Associates, *Economic Impacts to Visitors of Washington State Parks*)

SAN JUAN ISLAND NATIONAL HISTORICAL PARK ANNUAL VISITATION

2000	267,718
2001	301,067
2002	255,215
2003	246,150
2004	270,969
2005	246,780
2006	258,804
2007	273,289
2008	255,492
2009	274,642
2010	263,370

Source: <http://www.nature.nps.gov/stats/viewReport.cfm>

SAN JUAN ISLAND NATIONAL HISTORICAL PARK MONTHLY VISITATION, 2010

January	15,707
February	14,933
March	18,651
April	18,515
May	23,396
June	26,439
July	39,821
August	31,394
September	31,445
October	17,273
November	13,349
December	12,447

Source: <http://www.nature.nps.gov/stats/viewReport.cfm>

- In 2010, 263,370 visitors were recorded at American Camp and English Camp at San Juan Island National Historical Park (NHP). This was down slightly from the 2009 level. In 2009, visitation reached the highest level over the past five years, and up 7.5 percent from 2008. Annual visitation to the Park since 2000 is shown in the table on the previous page. The average annual visitation over the span of 2000-2010 was 264,863.
- According to a review of visitor statistics at San Juan Island NHP over the past ten years, May through September represents the peak period of visitation, with substantial visitation occurring in March, April, October and December (holiday influence) as well. This visitation pattern is generally indicative of visitation to other destinations in the San Juan Islands since most visitors to San Juan Island NHP also visit other locations. 2010 monthly visitation is shown in the table on the previous page.
- The average annual ridership (residents and visitors) to the San Juan Islands via the Washington State Ferries system is 1.7 million. Ridership from 2002 to 2010 remained steady. See Section 7 for more information about ferry ridership statistics.
- A 2009 study by the San Juan County Economic Development Council estimated that 25,000 kayaking visitors come to San Juan Island alone.
- The Whale Trail estimates that more than 500,000 people are involved in whale watching each year in the Salish Sea via commercial whale watch boats, private powerboats, and kayaks. Additional thousands watch whales from locations on shore. The “Be Whale Wise” program encourages shore-based whale watching and following other guidelines to protect the health of the orcas (www.bewhalewise.org, www.thewhaletrail.org, www.OrcaSound.net, and www.whalemuseum.org).

- Typical traffic volumes on San Juan County roads are summarized in Section 7 of this plan, and these also provide an indication of the levels of traffic and visitation at certain destinations on San Juan Island and Orcas Island, with hundreds of thousands of vehicles traveling on local roads each year.

In summary, hundreds of thousands of visitors come to the San Juan Islands each year, yet there are only 16,000 tax payers in the County to accommodate the infrastructure and public services needs for visitors. Although some revenue is provided through overnight lodging taxes and other taxes paid by visitors, overall there is a disproportionate burden on the local population to provide transportation such as roads and trails, as well as public services such as transit and safety and emergency response. However, tourism is one of the top economic drivers for the local economy, supporting many private businesses throughout the islands.

**COMMITMENT TO
LIVING SUSTAINABLY**

*Residents of the San Juan Islands
are deeply committed to living
sustainably and managing tourism
effectively to avoid impacts to natural
resources and the local quality of life.*

A World Famous Destination

The San Juan Islands are world-renowned as a vacation destination and frequently listed as a top place to visit in travel magazines and publications (see media referrals below). This attention is ongoing and continues to build momentum

as the world population grows and people continue to seek opportunities for relaxation and recreation across the globe.

Ongoing tourism promotion and marketing activities are important to support the local economy, which heavily relies on the travel industry.



SAN JUAN ISLANDS IN THE MEDIA

International, national, and regional media and publications continually show a strong interest in the destination value of the San Juan Islands. Here are a few of the media referrals from recent publications (partial list).

- *New York Times: The 41 Places to Go in 2011—listed as the number 2 place to visit in the world, in between Santiago, Chile as number 1 and Koh Samui, Thailand as number 3. (Editor’s tagline related to the San Juan Islands: “Bold-face restaurateurs vie with unspoiled nature. Nature wins.”)*
 - *National Geographic Traveler: The world list featured San Juan Islands as number 3 in the 10 Best Trips of Summer 2011, “all about weather, whales, and water”*
 - *Travel + Leisure: World’s Best List in 2011 and 2010, the number 4 position for Top Islands (moving up from number 9 in 2009)*
 - *Life: 100 Places to See in Your Life Time, July 2011*
 - *USA Today: Best Wildlife Watching Spots in Each State, July 2011*
 - *Lonely Planet: US Islands that Won’t Break the Bank, July 2011*
 - *New York Times: A Directory of Rare Wonders, May 2011*
 - *HUFFPOST TRAVEL: 10 Best Whale Watching Destinations Around the World, April 2011*
 - *The TODAY Show, NBC: Affordable Secret Island Getaways, April 2011*
 - *AOL Travel: Six Best Beach Vacation Spots in the Pacific Northwest, February 2011*
 - *Sunset magazine: “One of the Best Coastal Vacation Spots in the West 2010”*
- and the list goes on....*

Because there is a high level of public interest in and media attention drawn to the San Juan Islands, there will be a strong ongoing need to balance tourism promotion with managing tourism effectively. Effective tourism management will help to minimize impacts to resources and sustain the local culture and quality of life in the islands. For example, summer tourism levels are high compared to spring, fall and winter. Tourism management should continue to focus on ways to promote more visitation during the “shoulder seasons” (spring and fall) and in winter to help spread visitation throughout the year and support a stronger year-round economy. A continued strong pattern of summer tourism is also important to the local economy. Since most people travel in the summer, local businesses work to maximize revenues during those months to “make hay while the sun shines.” Directing visitors to sites with capacity and facilities to serve their needs

is another important aspect of tourism management. Effective tourism management is an important underlying focus of this plan.

Visitor Use Characteristics and Studies

Visitors to the San Juan Islands have diverse interests and needs. Several studies and surveys summarized on the following pages provide insight into these interests and needs.

National Park Service Visitor Study

A comprehensive visitor study by the National Park Service (NPS) Cooperative Park Studies Unit gathered important information about visitor use as a result of questionnaires distributed to San Juan Island National Historical Park visitors. The results reflect typical visitor use patterns at the Park, as well as visitor use to the San Juan Islands in general, since most visitors to the Park also travel to other areas around the islands. The study, conducted during peak period visitation (August), indicated that:

- 64 percent of visitors were part of a family group.
- Groups often consisted of two people (35 percent) or three to four people (38 percent).
- The most common visitor ages were 36-50 years old (37 percent) and 15 years or younger (21 percent).
- Most were first time visitors (68 percent).
- International visitors were from Canada (55 percent) and the United Kingdom (12 percent), as well as from other countries, primarily Europe and Asia.
- Visitors from within the United States came from Washington (49 percent), California (13 percent), Oregon (9 percent), and other states (29 percent).

MANAGING TOURISM EFFECTIVELY

People from all over the world are drawn to the extraordinary experience of the San Juan Islands. The strongest need in the islands over the long term will be to manage tourism effectively so that resources can be protected and the local way of life can be preserved.



Shoreline access is important to County residents according to a 2009 survey.

- Twelve percent of the visitors lived on San Juan Island either year-round or part of the year.
- The Park was not the primary destination for 80 percent of the respondents (rather a part of their overall visit to the San Juan Islands). Respondents stated the following reasons for their visits to the Park.

MOST COMMON REASONS FOR VISITING

1 To view scenery	87 percent
2 To learn about history	64 percent

Related to transportation and visitor orientation:

- 87 percent of the visitors used the ferry to get to San Juan Island.
- Once on the island, to get to the Park, 65 percent used a private vehicle, followed by 16 percent using rental cars/vans.
- One fourth of all visitors stated they went to the former Friday Harbor visitor center before visiting the Park or other sites. (Since

the time period that this survey was conducted, the visitor center in Friday Harbor, which was operated by the National Park Service, has been closed. The San Juan Chamber of Commerce still operates a visitor information center in Friday Harbor.)

In the NPS study, the most common activities visitors mentioned they were involved in during their visit are listed below.

VISITORS' MOST COMMON ACTIVITIES

1 Walking/hiking on trails	78 percent
2 Taking photographs	70 percent
3 Viewing wildlife	45 percent

The most visited sites in the Park were the historical camp at English Camp, the American Camp visitor center, the historical camp at American Camp, and the redoubt/earthen fort.

San Juan County Parks, Trails, and Natural Areas Community Survey

Respondents to a 2009 San Juan County survey indicated that the top five outdoor recreation activities they had most frequently participated in over the past year included:

TOP FIVE OUTDOOR RECREATION ACTIVITIES

1 Walking/hiking	88.1 percent
2 Watching wildlife	83.4 percent
3 Visiting public parks, trails, or natural areas	79.9 percent
4 Seeking solace/relaxation in nature in a County park or natural area	79.3 percent
5 Visiting a County park, trail, or natural area	78.2 percent

Other activities that more than half the respondents mentioned participating in over the past year (in order of most often mentioned to least) included walking their dog, going for a recreational drive, riding a bicycle for recreation, and using a hand-carried boat such as a kayak. The table below shows how respondents ranked the priority of services.

PRIORITY OF PARKS AND RECREATION SERVICES

1 Open space and natural areas	91 percent
2 Hiking/walking trails in parks	90 percent
3 Shoreline access & wildlife viewing	87 percent

In addition to these top three priorities, a high number of respondents also identified a need for the following services and facilities:

OTHER IMPORTANT PARKS AND RECREATION SERVICES

1 Picnic facilities, including shelters, tables and barbeques	73.2 percent
2 Playgrounds and play parks for children	73 percent
3 Camping facilities	66.2 percent
4 Hand-carried boat launches	65.2 percent
5 Community special events and festivals	62.6 percent

The top three highest-priority improvements to the County parks system mentioned were:

THREE HIGHEST PRIORITY IMPROVEMENT NEEDS

1 More trails (including hiking trails, bike lanes, and bike paths)
2 More shoreline access
3 Better maintenance of facilities

The needs to secure more funding and provide restrooms and benches along trails were also commonly mentioned. Overall, survey respondents expressed a strong interest in the development of more trails.

TRAILS/FACILITIES FOR WALKING AND BICYCLING—

Facilities for walking and bicycling are a high priority in the County. The majority of respondents called for expanding the County’s trail system through various means, such as trail development:

- Within existing rights-of-way or on County property
- Where donated lands are provided



Wildlife viewing is a popular activity in the San Juans.

- Within additional easements or rights-of-way purchased to facilitate new trail development.

Respondents favored unpaved walking paths and trails as well as designated and striped bike lanes along the road as the types of trail improvements they would like to see. They also preferred cross-island, point-to-point connecting trails, paved bike paths separated from road right-of-way or pavement, support facilities for trails such as parking, restrooms, picnic tables, and directional information, and paved pedestrian paths in town centers.

CAMPING—As stated above, residents expressed a strong interest in the need for more camping facilities in the islands, and so have visitors. When a 2005 study by Washington State Parks and Recreation Commission questioned where additional yurts, cabins and platform tents should be added to the Washington State Parks system, 28 percent of the respondents chose the San Juan Islands region as a preferred location. (This was third in the state, behind the “Ocean Beaches” and “Cascade Mountains”



Residents and visitors expressed a need for more camping facilities throughout the islands.

regions.) Camping at Moran State Park represents approximately 2.2 percent of the total percentage of camping available throughout the Washington State Parks system.

BEACH, MARINE, AND WATER ACCESS—Respondents chose beach or tidal access as the most needed type of water access in the County. The second choice was water viewpoints and vistas, followed by hand-carried boat launches, and docks for fishing or temporary moorage. Respondents listed locations throughout the islands where

beach access, boat ramps, and docks or floats are needed. General feedback offered included statements such as:

- “Community docks for other islands are needed to reduce dock proliferation.”
- “More access to County parks and communities.”
- “There should be more places for a few parked cars and kayak launching.”
- “We need a dock closer to the village in the summer for dinghies.”
- Improve what already exists and make more accessible.”

On San Juan Island and Orcas Island, survey respondents mentioned the following locations as their preferred places for beach access.

Beach Access

- North Beach on Orcas
- Orcas Island in general
- Ends of County roads in general

Boat Ramps

- West Sound on Orcas
- Eastsound on Orcas
- North Beach on Orcas
- Deer Harbor on Orcas
- Jackson Beach on San Juan

Docks or Floats

- Eastsound on Orcas
- County Parks in general
- Jackson Beach on San Juan
- Day use moorage in general

WILDLIFE WATCHING—Wildlife watching was the second-most mentioned activity in the County survey, and it is a strong interest for visitors coming to the islands. Research has

shown that wildlife watching enthusiasts tend to stay longer on a trip and spend more on their vacations.

FUNDING PRIORITIES—Respondents were asked to prioritize where funding should go for parks and recreation. Their priorities are listed below.

PARKS AND RECREATION FUNDING PRIORITIES

- 1** Purchasing land for parks, trails, natural areas
- 2** Developing off-street trails for walking and bicycling
- 3** Developing on-street bicycling lanes
- 4** Upgrading and renovating existing facilities
- 5** Improving access to the water/beach

AVAILABILITY OF INFORMATION—One in five respondents to the County survey indicated that information about recreation opportunities was not available or only sporadically available. A similar number of respondents indicated a lack of familiarity with County sites. When asked about preferred options for obtaining information, respondents indicated the following preferences. These can also be

seen as priority locations for providing information about the scenic byway.

- County website (63.9 percent)
- Aboard ferries (39 percent)
- Chambers of Commerce (32.4 percent)
- Parks/water access sites (30.1 percent)
- Newspaper (28.1 percent)
- Ferry terminals (23.5 percent)

San Juan Islands Visitors Bureau Information

The San Juan Islands Visitors Bureau conducts informal tourism and visitor surveys about once a year. A summary of the results from the most recent survey conducted in the summer of 2010 is provided on pages 5-12 and 5-13.



The public has expressed a strong interest in more non-motorized boat (canoe, kayak, etc.) sites in San Juan County.



SAN JUAN ISLANDS VISITORS

A survey of visitors conducted by the San Juan Islands Visitors Bureau in July/August 2010 gathered information from 164 visitors. Some of the data collected may present a skewed sense of visitor preferences and interests due to the small sample size and the types of businesses that distributed the survey. For example, a high level of bed and breakfast (B & B) lodging was reported, likely due to the survey being distributed at many B & Bs. However, overall the results still provide good general insight into San Juan Islands visitation demographics and visitor interests.

1. Why specifically did you choose the San Juan Islands for your trip?

Although the diverse answers were hard to quantify, most fell into these categories: scenic beauty, nature, outdoor recreation, whales, tradition, wedding, visiting relatives or friends, recommendations, reputation, bucket

list, relaxing, weather, crabbing/fishing, close to Seattle, and special occasion.

2. Have you ever been to the San Juan Islands before?

- No: 52 percent
- Yes: 48 percent

3. How did you hear/learn about the San Juan Islands?

- Friends/family: 51 percent
- Guidebook/map/media/magazine: 18 percent
- Live or lived in WA: 16 percent
- Internet: 8 percent
- Education/employment: 4 percent
- Been here before: 3 percent

4. Where are you from?

- Washington: 36 percent
- California: 15 percent
- Oregon: 12 percent
- Canada: 4 percent
- Other States: 26 others
- France & England

5. How many people are in your travel party, including you?

- Average # in travel party: 3.49

6. What is the age & gender of the person who made the travel plans?

- Average age: 50
- Males: 40 percent
- Females: 60 percent

7. Which Island(s) did you visit?

- San Juan: 76 percent
- Orcas: 40 percent
- Lopez: 16 percent
- Shaw: 2 percent
- Vancouver Island/Victoria, BC: 10 percent

8. How many nights did you spend in the Islands?

- Spent 1+ nights: 95 percent
- Day trip only: 5 percent
- Average # of nights: 3.48

9. Where did you stay?

- Friends/Family: 3 percent

BUREAU SURVEY, SUMMER 2010

- Campground: 10 percent
- Resort/Hotel/Cabin: 39 percent
- Bed & Breakfast: 52 percent
- Vacation Rental: 2 percent

10. How did you travel here?

- WA State Ferry: 84.5 percent
- Kenmore Air: 2 percent
- Victoria Express: 4 percent (from Victoria)
- Victoria Clipper: 3 percent (from Seattle)
- Other: 6 percent

11. Which activities did you enjoy during your summer visit?

- Dining: 74 percent
(ate out an average of 2.67 times)
- Shopping: 53 percent
- Hiking: 47 percent
- Park: 45 percent
- Whale watching from land: 40 percent
- Art galleries: 30 percent
- Beachcombing: 30 percent
- Whale watching from a boat: 29 percent
- Bike/moped: 26 percent
- Kayaking: 25 percent

- Farmers' Market: 21 percent
- Winery: 18 percent
- Boating/sailing: 16 percent
- Museum: 14 percent
- Farm: 12 percent
- Festival/event: 9 percent
- Community theatre: 4 percent

12. Approximately how much did you spend during your visit to the San Juan Islands?

- \$0-\$250: 16 percent
- \$250-\$500: 16 percent
- \$500-\$1,000: 31 percent
- \$1,000-\$2,000: 24 percent
- \$2,000-\$5,000: 10 percent
- More \$: 2 percent

13. Do you believe you received a good value for the amount of money you spent in the San Juan Islands?

- Yes: 85.4 percent
- Not sure: 9 percent
- No: 5.5 percent

14. Did your visit:

- Meet your expectations: 56 percent
- Exceed expectations: 37.6 percent
- Did not meet expectations: 6 percent

15. Will you visit the San Juan Islands again?

- Yes: 76 percent
- Maybe: 20 percent
- No: 4 percent

16. Will you recommend the San Juan Islands to your family & friends?

- Yes: 97 percent
- Maybe: 2.5 percent
- No: 0.6 percent (1 person)

Economic Benefits and Challenges of Tourism and Travel Spending

According to an annual study by Dean Runyan Associates for Washington State, annual tourism spending in San Juan County has gradually increased since 2003, reaching nearly \$130 million in 2008. Spending in 2009 was down due to the economic recession, totalling \$116.4 million. Earnings from travel in the County totaled \$42.7 million in 2008 and \$39.4 million in 2009. 1,740 travel-related jobs were generated in 2008, and 1,580 jobs were generated in 2009. San Juan County typically ranks in the top three of all counties in Washington for its level of earnings and jobs generated (by percentage). Overall travel spending in San Juan County has increased more rapidly than in other counties in Washington.

For additional information, including more detail about categories of traveler spending in San Juan County (e.g. hotel/motel, camping, food, retail, etc.), refer to the Washington State County Travel Impacts 1991-2009, Dean Runyan Associates, September 2010 and the San Juan County Comprehensive Plan, Economic Development Element, 2007.

Overall, direct travel spending in Washington totaled \$14.1 billion in 2009, and spending by international visitors accounted for 10 percent of all visitor spending in the state, with residents from other states accounting for 53 percent of all travel spending. Average daily and trip spending by travel parties/persons in Washington state in 2010 is shown below.

For San Juan Island specifically, responses to a National Park Service visitor survey indicated that over one-third of the visitors (38 percent) estimated their total expenditures during

their visit as up to \$150. Twenty percent said they spent \$378 (or more). The average visitor expenditure during the visit was \$254 and the average per capita expenditure was \$77. (These expenditures included estimated costs by visitors associated with day trips as well as overnight visits that involved a stop at the National Historical Park. Estimated expenditures were adjusted to reflect inflation since the original survey period. While the recent economic recession likely impacted visitor spending levels, these numbers are generally consistent with the state statistics and are thought

AVERAGE DAILY AND TRIP SPENDING BY TRAVEL PARTIES AND PERSONS, WASHINGTON STATE, 2010

Accommodation	Total in Millions	Per Travel Party		Per Person	
		Per Day	Per Trip	Per Day	Per Trip
Overnight	\$7,410	\$205	\$728	\$76	\$271
<i>Hotel/Motel</i>	\$5,011	\$352	\$844	\$185	\$444
<i>Other Overnight (Camping, etc.)</i>	\$2,399	\$109	\$438	\$34	\$137
Day	\$1,863	\$224	\$224	\$86	\$86
Day & Overnight	\$9,273	\$208	\$491	\$78	\$184
Transportation	\$3,703				
TOTAL/AVERAGE	\$12,976	\$292	\$687	\$109	\$257

Sources: Dean Runyan Associates, TNS TravelsAmerica Survey, and Longwoods International. Spending on resident air transportation and travel agencies are not included in this table. Spending on transportation is only included in the total.

to be accurately representative of visitor spending levels in the San Juan Islands.)

The NPS Social Science Program conducts modeling to show economic benefits to some gateway communities resulting from national park attendance. For the San Juan Island National Historical Park, the model showed \$15,415,000 in economic benefits for fiscal year 2005 (based on the attendance that year of 246,780). The model also estimated that 337 jobs in the tourism and service sector were tied to the presence of the park. With

visitation levels in recent years exceeding those of 2005, the current economic and employment benefits are now even higher than this 2005 measurement.

The tourism industry is clearly a key economic anchor for San Juan County, generating more than 20 percent of all County employment and tax receipts (San Juan County Comprehensive Plan). While more vital to some islands, and portions of islands, than others, it nonetheless generates revenue and taxes that offset the costs of services County-wide and provides income for residents.

Issues Related to Tourism

While tourism is an important lifeblood of the local economy, its seasonality creates economic challenges for the region's communities, individual businesses, and employees. Business activity and the demand for the local work force are highly influenced by the summer peak visitation period – typically from June through September each year. This seasonality directly and indirectly affects all sectors of the local economy. Local citizens often grow frustrated with the instability of year-round business and dislocations caused by summer tourism, as well as the stresses placed on infrastructure and community services by summer visitors.

Another ongoing challenge in the islands is affordability of housing for permanent and seasonal employees in the tourism industry as well as for moderate income wage earners. A growing income disparity between retirees and wage-earning residents has resulted in San Juan County being one of the least affordable places to live in Washington. This condition also has a direct affect on the work force available to fill jobs, particularly seasonal employment driven by the tourism industry.



Visitation to San Juan Island National Historical Park provides strong economic benefits to the local economy.

Restaurants and food services are typically some of the most affected types of businesses by the seasonal nature of the tourism industry, as well as the large proportion of part-time residents. Restaurants and food service businesses have a difficult time achieving year-round profitability and increasing difficulty finding seasonal workers. The success of restaurants in the islands is largely dependent on a successful tourism industry.

Stabilizing the local economy by extending revenue over a more sustained, year-round period are ongoing priorities for local leaders, policy-makers, and citizens. Finding more diverse employment industries/generators and promoting off-season



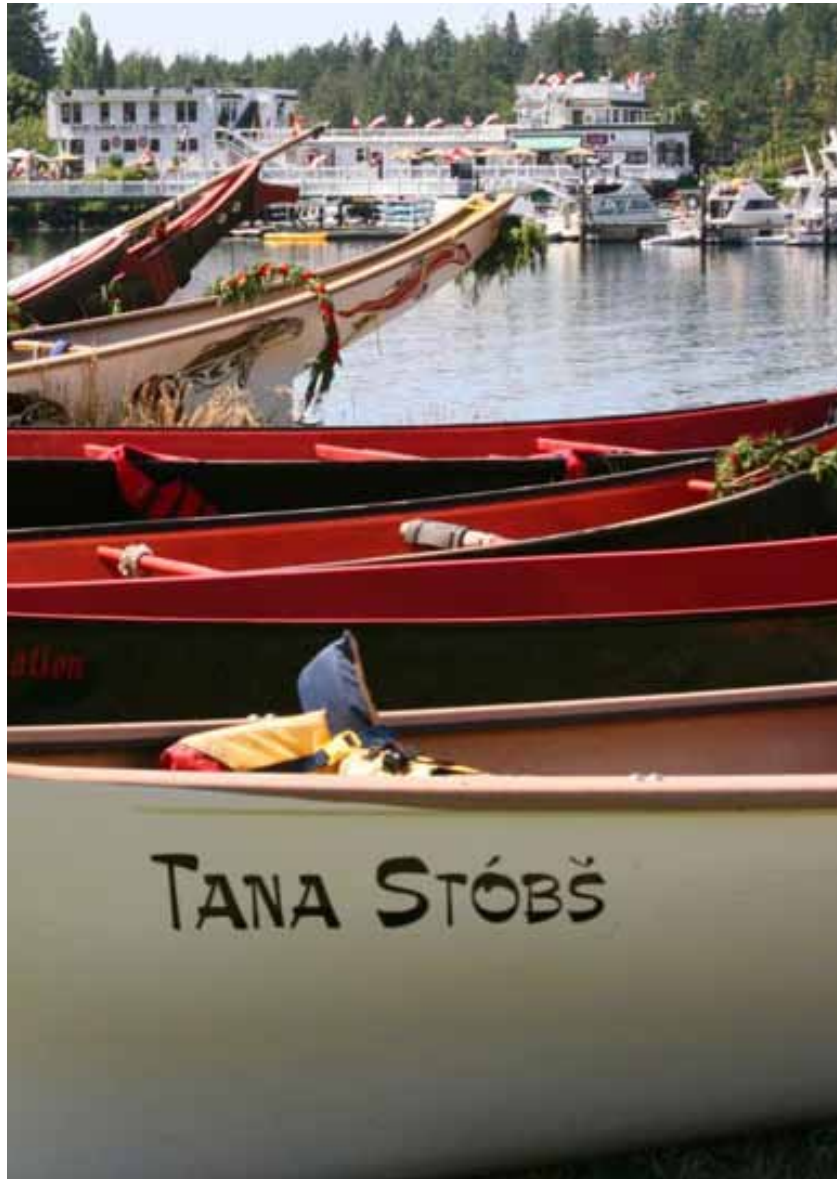
The local economy is largely dependent on tourism.

and shoulder-season tourism are strategies being implemented to help strengthen the year-round economy. For example, visitor spending during the shoulder seasons has increased slightly in recent years, due to the Visitors Bureau focus on promoting spring and fall events (artist studio tours, agri-tourism programs, weddings, etc.) as well as special programs such as the Skagit Valley College's Road Scholar Program (formerly Elder Hostel).

A new program, "Island Grown," supported by the Agricultural Resources Committee has been a bright spot in these challenges. This program promotes food establishments offering locally grown items and is receiving positive support from numerous establishments. (Source: *Economic Development Element, San Juan County Comprehensive Plan*) The San Juan Islands Visitors Bureau is also working to support the food and agricultural sectors with new tourism promotion programs, such as "Savor the San Juans" during October.

The success of the tourism industry, as well as other key industries, is highly dependent on the health of the area's ecosystems. In particular, recreation and tourism-related industries (such as wildlife watching and kayaking), commercial and tribal fisheries, shellfish growers, agriculture, forestry, and real estate development all directly and indirectly benefit from, and even rely upon, a high-quality natural environment to succeed. The quality and allure of the islands also includes the sense of place, the small town atmosphere, as well as historic buildings and cultural landscapes.

For additional information about the relationship of tourism to the local economy and marketing and promotional recommendations for the byway, refer to Section 9—Attracting Stewardship-Minded Visitors: Marketing and Promotions Program.



Cultural programs such as the Canoe Journey rely on the high quality environment of the Salish Sea and San Juan Islands to provide an enriching experience to participants.

Accommodating Scenic Byway Visitors

Scenic byway travelers and visitors to the San Juan Islands have basic needs such as lodging, food, water, public restrooms, information, and emergency and medical services. All of these basic accommodations, and more, are available along the San Juan Islands Scenic Byway, including services and facilities in Anacortes (a key mainland gateway community to the byway), at ferry terminals, onboard the ferries, and on San Juan Island and Orcas Island. While the current level of facilities and services is sufficient to serve the traveling public, there are some specific needs in key areas of the byway where investment in facilities would help to better manage and direct tourism and visitors, and enhance their experience of the byway. These needs are summarized below and on the following pages.

Expanding Multi-modal Transportation Facilities

Expanding multi-modal transportation options for byway travelers is a key strategy to support both environmental and economic sustainability in the San Juan Islands. As visitation to the San Juan Islands continues to grow, the need for increased access to public transportation, as well as expanded bicycling and walking facilities (bike lanes, widened shoulders, sidewalks, shared streets, trails and paths, etc.) will also increase. The time to start planning for this inevitability and seeking funding to support multi-modal improvements is now. Refer to Section 7— Expanding Multi-modal Transportation Options for more information.



Expanding multi-modal transportation options is a key strategy to support sustainability.

Fostering Stewardship and Preserving the Byway's Character

Visitors are drawn to many aspects of the San Juan Islands – the extraordinary scenery, rich history and culture, and abundant natural resources (such as the natural forests, prairie landscapes, and beaches). The islands also provide extensive recreation opportunities, such as wildlife watching, hiking, kayaking, camping, and many other activities. The islands' distinctive rural character, and the sustainable lifestyles of the people who live here, are also important aspects of the islands.

Preservation of the unique qualities that draw people to the islands is critical to sustaining tourism. Protection of the natural and cultural resources of the islands needs to continue to be a priority for local, county, state, and federal government, as well as citizens of the islands. Encouraging visitors to be good stewards is an important part of the process as well. Given these considerations, the corridor management plan places a strong emphasis on instilling a sense of stewardship with visitors to the

islands. Stewardship is a tradition that is thousands of years old in the San Juan Islands, and today it's part of the fiber of local lifestyles. People from the Coast Salish tribes were the first stewards of the islands, and the surrounding Salish Sea. The San Juan Islands Scenic Byway will follow in this tradition by promoting sustainable tourism and encouraging visitors to become stewards of this unique place, just as residents are. Proposed actions related to promoting stewardship and providing interpretation and education to byway visitors are further described in Section 6.

Many of the islands' unique and intrinsic qualities are already preserved and maintained through land preservation and management programs and land use plans. However, some qualities and resources continue to be at risk. Section 9—provides design guidelines for roadside elements and recommendations for retaining the byway's intrinsic qualities, including its scenic beauty. Additional actions related to fostering stewardship as part of tourism marketing and promotions are described in Section 10—Attracting Stewardship-Minded Visitors: Marketing and Promotions Program.

Visitor Accommodations, Facilities, and Services

Visitor accommodations, facilities, and services are available all along the byway. Many of the key sites described in Section 4 provide basic facilities such as public restrooms and information, as well as various recreation opportunities for visitors. In addition, most towns and villages along the byway provide public restrooms, lodging, dining, and other accommodations. Available accommodations, facilities, and

services are further summarized below, along with additional recommendations for the byway organization as it continues to manage tourism and accommodate visitors in the coming years.

One of the most important responsibilities of a scenic byway program is being able to sufficiently guide visitors to available accommodations, facilities, and services along the byway. Numerous publications, brochures, and websites provide information about where to stay and eat, places to visit, and things to do in the San Juan Islands. The Chambers of Commerce offices in Friday Harbor (San Juan Island) and Eastsound (Orcas Island) serve as visitor information centers. Various other destinations along the byway, such as national, state, and county parks, and local businesses, also provide information to visitors. Byway maps and information displays with easily recognizable international icons identifying locations of accommodations, facilities, and services should be placed at gateways to the byway and at key hubs and destinations, as well as on websites. Refer to Section 8—Helping Visitors Find Their Way: Wayshowing and Signing Program and Section 11—Action Plan for more specific recommendations. Also refer to Section 6—Enhancing the Visitor Experience through Interpretation and Improvements for additional recommendations.

Lodging

A wide variety of lodging opportunities are available on San Juan Island and Orcas Island, including hotels, historic inns, cabins, vacation rentals, camping, bed and breakfast establishments and other accommodations. Lodging is also available in Anacortes, as well as along the I-5 corridor. Popular public camping opportunities include Moran State Park (150

campsites) San Juan County Park (20 campsites and a group camp area) and other Cascadia Marine Trail campsites. As the byway organization continues to plan for accommodating visitors in partnership with the San Juan Islands Visitors Bureau and local Chambers of Commerce, it should:

- Work with State and County land managers to support expansion of camping opportunities in the islands as appropriate and manageable.
- Coordinate with lodging and hotel/motel representatives to promote the byway, along with key visitor stewardship messages.
- Work with lodging and hotel/motel representatives in Friday Harbor, Eastsound and other locations to coordinate shuttle and alternative transportation to destinations along the byway.
- Coordinate with lodging providers and emergency and medical services representatives to develop visitor-specific emergency and disaster-preparedness plans.

Dining and Culinary Opportunities

Visitors can choose from a broad diversity of dining options in the main towns and villages along the byway, as well as off the beaten path on the islands. Eating establishments are available year-round, but some restaurants do close during the off season. Cafes and delis as well as gourmet restaurants featuring a wide variety of cuisine are available in Friday Harbor and Roche Harbor on San Juan and Orcas Village and Eastsound on Orcas, as well as in some of the hamlets and smaller crossroads locations, such as Deer Harbor, Olga, and Doe Bay on Orcas. There are also several grocery stores and convenience stores, and some lodging facilities have food preparation and storage capabilities. Travelers are interested in locally grown and produced food and experiencing

local fare as part of their visit to the islands. The Agricultural Guild (AG) and Agricultural Resources Committee (ARC) are working closely with tourism representatives to promote access to farm goods along the byway. The byway partnership should continue to:

- Coordinate with eating establishment representatives to promote the byway, along with key visitor stewardship messages.
- Partner with the AG and ARC to promote local farms and farmstands as well as culinary events.
- Promote locally grown and made foods and products to byway visitors.

Arts and Culture

The islands are rich with opportunities to experience arts and culture. A few of these are summarized below. The byway partnership should:

- Continue to promote access to arts and culture as part of the byway experience, working closely with representatives from the arts community, the Visitors Bureau, local Chambers of Commerce, and others.
- Develop an “Arts and Culture” tour experience along the byway highlighting public art (naming works and artists), studios, galleries, and exhibits.

ART GALLERIES AND STUDIOS/SCULPTURE PARK—

Paintings, pottery, jewelry, prints, glass art, textiles, photography, sculpture, wood and metal arts, and other arts and crafts are on display in galleries and studios throughout the islands, including locations in Friday Harbor and Roche Harbor on San Juan Island, Eastsound, and Olga on Orcas Island, and various others. Art exhibits are also available at the Orcas Senior Center and the

Orcas Center, both in Eastsound, and the San Juan Community Theatre in Friday Harbor. Numerous artist studios are open to the public on both San Juan and Orcas. There is even a houseboat art gallery that travels from harbor to harbor in the islands (check www.frommphotos.com for schedule).

There is a long-time tradition of the arts, including pottery making, in the islands. Visitors can not only view and purchase works at the studios, but in some cases learn and participate in making their own pottery. Various maps and brochures highlight the locations of studios in the islands. Many studios are open by appointment only or with limited hours. There are several art studio tours and special art events in the islands, held at various times throughout the year. “ArtStock” held in October is one example.

Near Roche Harbor, over 100 works of art are displayed on 19 acres at the San Juan Islands Museum of Art and Sculpture Park. The Sculpture Park also offers nature trails and trail maps and art and nature workshops and is open year-round every day from dawn to dusk.

PERFORMING ARTS—A diversity of opportunities to enjoy performing arts are available on the islands, including:

- **San Juan Community Theatre** – Local and touring shows year-round, including music, drama, and dance.
- **Island Stage Left** – Resident professional theatre at Roche Harbor and Wold Road outdoor stages presents Shakespeare Under the Stars; no admission fee; donations welcome.
- **Stage on the Green** in Eastsound – Outdoor performances in season.



- **Orcas Center** – Arts and cultural center presenting dance, theater, music, and visual arts.
- **Actors Theater** of Orcas Island.
- **Organ and piano concerts** at the Historic Rosario Resort.

Farms and Farmers Markets

Visitors have opportunities to experience working farms and to visit various farmers' markets and farm stands along the byway. Places open for public visitation are summarized below. The byway partnership should:

- Continue to promote access to farms and farmers' markets, as well as culinary tours and experiences, as part of the byway experience, working closely with representatives from the agricultural community.
- Develop a "Farms and Barns" tour experience along the byway, highlighting local farms open to the public, and historic barns and sites.

FARMS—Farms, ranches, gardens, orchards, wineries and tasting rooms (cideries, distilleries, etc.) are open to the public seasonally on both islands. Visitors can learn about raising sheep (a long-standing tradition in the San Juans), goats, alpacas, chickens, and other livestock, purchase organically-grown local foods, and participate in a host of other fun activities.

FARMERS' MARKETS—Open to the public on both islands in season.

- **San Juan Island Farmers' Market** in Friday Harbor, April-October, Saturdays (vegetables, fruits, flowers, goat cheese, meat, seafood, baked goods, and more).
- **Orcas Island Farmers' Market** at the Village Green – May through September, Saturdays (farmers vegetables and fruits, plants and flowers, island crafters with hand-made jewelry, art to wear, ceramics, textiles, soap, and other goods)

Heritage and Historic Sites

Historic structures, sites, and objects may be found in the byway’s towns and villages, and dotting the countryside. These provide opportunities for visitors to learn about the rich heritage of the islands. There are national historic register and landmark sites throughout the islands (see appendix). The sites described on this page offer public services and programs that will enhance scenic byway visitors’ experiences. Related to historic sites and heritage tourism, the byway partnership should:

- Continue to promote access to historic sites and heritage of the islands as part of the byway experience, working closely with the historical societies and other organizations.
- Develop a “History of the San Juan Islands” tour experience along the byway, working closely with history experts.
- Work closely with representatives from Coast Salish tribes to reflect tribal history as part of the tour experience and in byway interpretation and educational materials.
- Encourage the creation of a County-wide historic preservation association.

- Identify and implement preservation strategies for barns that include visitor access, interpretation, and education opportunities.
- Provide a specific brochure identifying all designated historic sites and landmarks on San Juan and Orcas islands.

HISTORIC BARNs—The 100 Friends of Old Island Barns works to preserve, and promote awareness about, the historic barns on the islands, some still in agricultural use, others have been repurposed. Some, though on private land and not open to the public, are visible from scenic byway routes.

HISTORIC FRIDAY HARBOR WALKING TOURS—Guided tours on Saturdays in May or private tours available; reservations required or take the self guided tour, following the *Historic Friday Harbor on Foot* guide, available at the historical museum, town hall, and book stores.

SAN JUAN HISTORICAL MUSEUM—1890 James King homestead with milk house and carriage house, a 100-year-old log cabin and the first County jail; new exhibits each year.

ROCHE HARBOR HISTORIC WALKING TOUR—Self-guided tour following brochure available at the hotel, covers 1886-1956 features of the historic Roche Harbor Resort including buildings and RH Lime & Cement Company workings.

ORCAS ISLAND HISTORICAL MUSEUM—Six log cabins built on Orcas Island in the late 1800s make up the museum site. Exhibits focus on the history of the Coast Salish First Peoples and early settler life. The Museum is open July through September, Tuesday through Sunday. A special program with Orcas Islands elders speaking about the “old days” is held on summer Saturdays.

HISTORIC CROW VALLEY POTTERY—1866 log cabin restored and displaying the work of over 80 artists.

HISTORIC CROW VALLEY SCHOOL MUSEUM—1888 restored schoolhouse. Open late May through late September, Wednesday and Saturday; group tours can be arranged.

Public Beach Sites/Water Access
In addition to the marine access afforded by the byway via the ferry excursion



San Juan County Park provides public beach access

across the Salish Sea, access to the water from land is another key experience of the byway. The sites listed on this page and the following are designated as locations where there is **public** access to the beach/shoreline on San Juan Island and Orcas Island according to Washington State Department of Ecology records. Regarding public beach sites and water access, the byway partnership should:

- Confirm which sites should be promoted to scenic byway visitors and identify these sites on byway maps, brochures, and website.
- Coordinate with land managers to post information about the byway

and provide stewardship messages at sites as feasible.

- Support San Juan County and other land managers in implementing improvements to beach and water access in accordance with local plans and priorities.

San Juan Island

- English Camp National Historical Park
- Reuben Tarte County Park*
- Historic Roche Harbor Resort & Marina
- Snug Harbor Resort and Marina
- Friday Harbor University of Washington Labs*

- Port of Friday Harbor
- Friday Harbor Ferry Landing
- Channel Vista Shore Access*
- Jackson Beach
- Lime Kiln Point State Park
- San Juan County Park
- American Camp National Historical Park (multiple sites listed)
- Fish Creek Public Access*
- Cattle Point Lighthouse Recreation Site

Orcas Island

- North Beach End Road
- Crescent Beach Preserve at Ship Bay*
- Fishing Bay Waterfront Park
- Fishing Bay Public Dock
- Historic Rosario Resort
- West Sound Marina
- Site northwest of West Sound Marina
- Resort at Deer Harbor
- Site north of the Resort at Deer Harbor site
- Site south of Resort at Deer Harbor Site
- Olga Marine State Park
- Olga County Park

- Obstruction Pass Recreation Site
- Obstruction Pass Boat Launch
- Orcas Island Ferry Terminal/Orcas Landing Area

**Note: These locations are small, primarily for local use, and currently should not be promoted to byway visitors.*

CASCADIA MARINE TRAIL SITES—

The Cascadia Marine Trail is a water trail promoted for use by small, wind- or human-powered beachable watercraft with designated landside campsites and day use points from south Puget Sound to the San Juan Islands. The following sites on San Juan Island and Orcas Island are designated points along the Cascadia Marine Trail:

- San Juan County Park (camping site)
- Griffin Bay State Park
- Point Doughty State Park
- Obstruction Pass State Park

Nearby Posey Island is also a site on the marine trail.

Other Facilities and Services

Other facilities and services are available for visitors, such as groceries, fuel,

post offices, medical, rental stores, bookstores, and a variety of other specialty shops and services. These facilities and services are primarily concentrated in the main community hubs on each island – Friday Harbor on San Juan and Eastsound on Orcas.

GROCERIES AND CONVENIENCE STORES—

Larger grocery stores and bakeries are located in the towns of Friday Harbor on San Juan Island and Eastsound on Orcas Island; smaller grocery and convenience stores are available at Roche Harbor, Lakedale Resort, States Ranch Inn, and Snug Harbor on San Juan Island and in Orcas Village, West Beach, Deer Harbor, Lieber Haven, and Doe Bay on Orcas Island.

GASOLINE/FUEL—

Locations in Friday Harbor (and one at Roche Harbor; one location in Eastsound on Orcas Island (corner of Crescent Beach Drive and Terrill Beach Road); and another at Island Hardware on Orcas Island (at the corner of Orcas Road and West Beach Road).

POST OFFICES—

Available in Friday Harbor and Roche Harbor on San Juan Island, and Orcas Village, Deer Harbor,

Eastsound, and Olga on Orcas Island. (Each post office on Orcas Island has its own zipcode.)

DOG PARKS—

Eddie & Friends Dog Park, Mullis Road in Friday Harbor; Eastsound Community Dog Park (just west of town via Enchanted Forest Road by the airport).

GOLF & TENNIS—

Public courses are available on both islands: San Juan Golf and Country Club on San Juan Island and Orcas Island Golf Club on the east side of Orcas Road.

HORSEBACK RIDING—

Orcas Island: trail rides/horseback riding at various locations; San Juan Island: guest ranches and horseback riding at various locations.

GUIDED NATURE HIKES—

San Juan Island: birding and nature tours, plus island history and geology, individuals or groups; Orcas Island: natural history, wildlife and wild edibles.

OUTDOOR EXPEDITIONS/WHALE AND WILDLIFE WATCHING TOURS/ KAYAKING TOURS/CHARTERS (SAILING, FISHING, ETC.)—

Numerous options are available. For shore-based

whale watching and inter-tidal exploration, visit The Whale Museum.

BOWLING—In Friday Harbor.

MOVIE THEATERS—In Friday Harbor and Eastsound.

FITNESS CENTERS—In Friday Harbor and Eastsound.

FUNHOUSE DISCOVERY CENTER FOR KIDS AND ADULTS—Science, arts and crafts on Orcas Island.

SHOPPING—Numerous stores with clothing, gifts, books, cards, and various sundries are available throughout both islands.

SENIOR CENTERS—Available in Friday Harbor (Mullis Senior and Community Center) and Eastsound (Orcas Senior Center).

EMERGENCY AND MEDICAL SERVICES—Available in Friday Harbor and Eastsound.

BOOKSTORES—Available in Friday Harbor and Eastsound.

RENTAL CENTERS—Numerous services available for cars, bicycles, electric bicycles, mopeds, skateboards, paddle boards, electric boats, power boats, pedal kayaks, kayaks, etc.

AIRPORTS AND PUBLIC TRANSPORTATION—Airports in Friday Harbor and Eastsound; charter flights and touring flights available from multiple providers. Seaplane access is

available to both islands. Refer to Section 7 for additional information.

PUBLIC TRANSPORTATION—Shuttle services and taxis available on San Juan Island (from Friday Harbor) and Orcas Island. Refer to Section 7 for additional information.

PORTS AND MARINAS—Available on both islands.



The Palace Theater in Friday Harbor