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To: Ingrid Gabriel
Subject: Population Projection Comments

Comments to Planning Board – Population Projection

A true understanding of the current and future demographics of the county is essential for effective planning. However, the minimum state requirements of the plan (full time resident forecast) is wholly inadequate to obtain a realistic assessment of the structure of San Juan County's population and future resource needs given our unique demographic profile within the state – temporary/seasonal residents, high vacation rental house share, summer tourist visitation, retirement age skew. I encourage the county to build a demographic and economic model that can enable 'what-if' decision-making by the council on different future distributions of these segments.

My understanding is that fundamental questions like these can't be answered today:

- What is our true population (full time, season, tourist) throughout the year?
- What is our occupancy/utilization rate of full time, rented, and hotel housing throughout the year?
- What are our trends between housing segments?
 - Full time, long term rental, transient rental, hotel, boat
 - Seasonal <> Seasonal/Full time mix <> Full time
 - Owner <> Investor
- What is the economic contribution of these different economic segments to the county to support the local tax base and businesses? Is there an optimum mix for tax generation and local investment?

Getting this data is a challenging problem that ultimately requires direct surveying but approaches using external data sets may provide sufficient accuracy to provide insights sufficient for policy development.

Insights into our true population level throughout the year could be derived from utility records:

- Active cell phone circuits

- Electrical consumption (seasonally adjusted)
- Water consumption on public utility served areas
- Ferry passenger flow

Utilization rates of transient rentals can be extrapolated from VRBO / AirBNB availability tables and property manager records. Hotels can be asked directly.

Utilization of seasonal homes could be derived by analysis of electricity consumption.

IT systems have become increasingly capable in their analytics in the past 10 years and these data sets may be more readily available than we might be assuming. For example, Opalco tracks electricity consumption by subscriber daily and makes that information available online to their members. Concerns about privacy can be addressed by “anonymizing” and aggregating data to prevent its association with individuals.

The other data is likely to require direct surveys.

I anticipate that insights from this type of data is going to be far more valuable to county decision-makers than a simple extrapolation of our full time population derived from state statistics. It is worth some effort to acquire.

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