

Appendix B

Additional information and results from visitation analysis

Additional methods information

Initial request to Washington State Ferries

To: John Vezina, Government Affairs Liaison, Washington State Ferries

From: Doug Whittaker and Bo Shelby, Confluence Research and Consulting
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Regarding: San Juan Islands Visitor Study

Date: April 18, 2017

Summary of request

Confluence Research and Consulting is leading a series of integrated studies on visitor use to the San Juan Islands in 2017. Two components require assistance from WSF:

1. Permission to survey Anacortes-bound ferry riders as they wait in/near their vehicles and the walk-on lines at Friday Harbor, Lopez, and Orcas.
2. Access to the WSF fare-based database to conduct additional analysis on vehicle and passenger use levels.

Survey request

We are currently developing a 6-8 page survey designed to be completed by visitors or residents as they wait to load Anacortes-bound ferries at Friday Harbor, Orcas, or Lopez.

In general, our planned protocol is to

1. Have survey technicians approach groups after they have parked in Anacortes-bound lanes or are lining up at the walk-on lines about one hour before a scheduled sailing.
2. A random member of each group will be asked to complete the survey (person with the next birthday).
3. The surveys ask several questions about people's trips, their evaluations of conditions and public facilities around the island, and support for management actions to improve the quality of trips in the future.
4. We are developing a draft of the survey and will send it to WSF for review; we suspect many topics in the survey will be of interest to WSF planners to assess ridership patterns.
5. The survey is voluntary, and we will make a single request to participate.
6. All survey responses will be kept confidential, and the survey does not ask for names or addresses of respondents.
7. The survey will take most people about 10 to 12 minutes to complete.

8. The technician will collect the surveys when people are finished; all surveys should be collected about 10 minutes before the scheduled sailing (no new surveys will be handed out more than 20 minutes before a sailing).
9. We expect to survey about 8 to 10 groups per sailing.
10. We expect to survey about 30 one-hour sessions at Lopez and Orcas (target sample sizes of 300 each) or about two sailings a week for 15 weeks from early June through mid-September.
11. We expect to survey about 50 one-hour session at Friday Harbor (for a sample size of 500) or about three sailings a week for 15 weeks.
12. The surveying will occur on a schedule to cover morning, mid-day, afternoon, and evening sailings on both weekend and weekdays.

In order to reduce any safety risks:

1. We would be willing to wear a reflective vest or other identifying clothing.
2. We will only survey in areas that your loading staff deem allowable after cars have been stopped (we will not approach moving vehicles).
3. Check-in with any onsite staff to make sure they know when we are surveying, and obey any instructions they have about staying out of the way of the loading process.

Ferry ridership analyses

While WSF provides excellent quarterly and annual statistics on ferry ridership, we are interested in conducting a finer-grain analysis to document daily use through the 2017 season, and examine average and peak use by day of the week, weekday-weekends, and months of the year. We also understand it may be possible to analyze zip code data for reservations, which could help assess proportion of ferry ridership from different islands vs. those from the mainland.

Current WSF statistics are presented by vehicles and passengers, with sub-divisions by type of fare (full vs. multi, and by vehicle size) for each route for each quarter. As discussed above, we are interested in some additional analysis of this primary data set for the following five routes:

- Anacortes – Friday Harbor
- Anacortes – Orcas
- Anacortes – Lopez
- Anacortes – Shaw
- Interisland

For each route, we are interested in analyzing...

Per sailing statistics (possibly for a sample time period) to:

- Examine differences between morning, mid-day, afternoon, and evening ferries.
- Examine differences by ferries with different capacities, and to assess whether some ferries fit more vehicles than design capacities.

Per day statistics to:

- Examine differences by day of the week in peak and shoulder seasons.
- Examine use over specific high use periods such as Memorial Day, Fourth of July, and Labor Day holiday weekends.

Per month statistics to:

- Examine overall trends through the year.

Zip code analyses to:

- Examine the proportion of reservations from different San Juan County zip codes vs. those from other counties in WA vs. places outside WA.

Bicycle surcharge statistics to:

- Assess the average number of bikes (not with a vehicle) on different routes.

We would like to talk with you IT/database manager (Marsha Walker?) to discuss the type of data available from previous years, as well as a timeline for receiving information from 2017 (we recognize it may be difficult to provide data until after a quarter is complete). Our preference is a database in Excel or a similar format (we plan to convert that so we analyze the data in SPSS, a social science statistical package), but we be able to handle other formats.

Project background

The project is designed to help the County assess visitor management issues and opportunities related to increasing use levels in the San Juan Islands. The Visitor Study fits with additional work being conducted through the Terrestrial Managers Group, which includes several cooperating federal, state, and local land managing agencies (including San Juan County Parks and Land Bank, NPS, BLM, Washington State Parks, and Washington State Department of Natural Resources). That work includes visitor use studies that will document overall use levels to the islands, site-specific use levels and patterns, and an inventory of accommodation on the islands.

Response from WSF

WSF sent individual sailing data for all the requested routes for June, July, August and September – after removing days when schedules were modified due to maintenance issues.

Longer term analysis was conducted on data downloaded from the WSF website, which publishes quarterly data by route and type of fare.

Additional sailing-by-sailing information

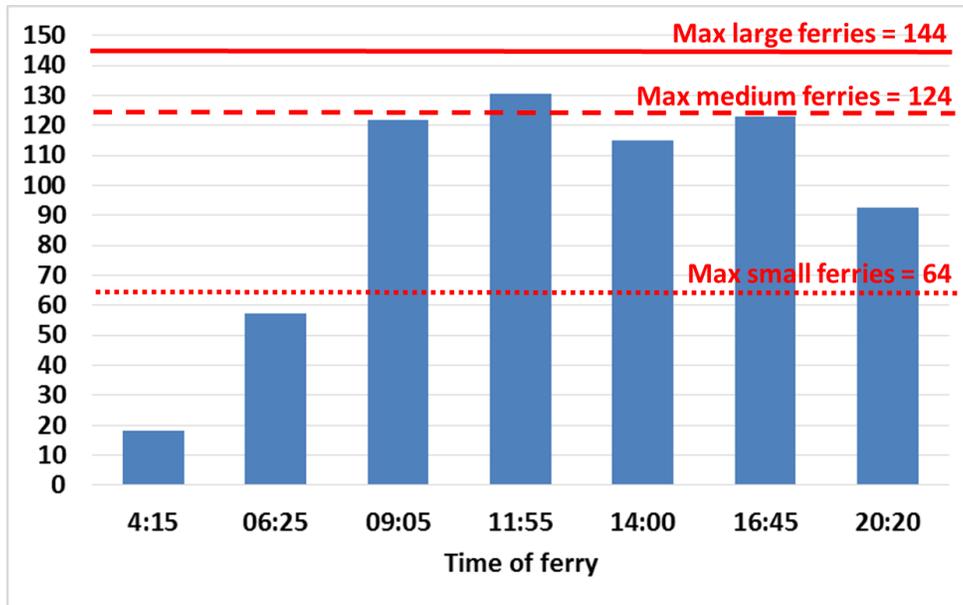


Figure 1. Average vehicles per day from Anacortes to Friday Harbor by time of sailing (summer 2017).

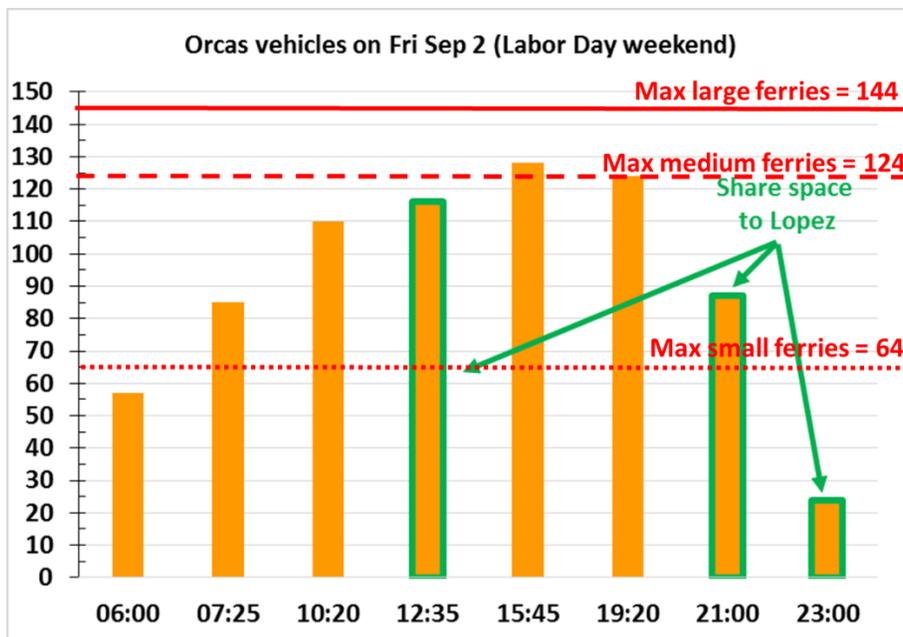


Figure 2. Vehicles on individual Anacortes-Orcas sailings on a busy day (Friday Sep 2, 20178).

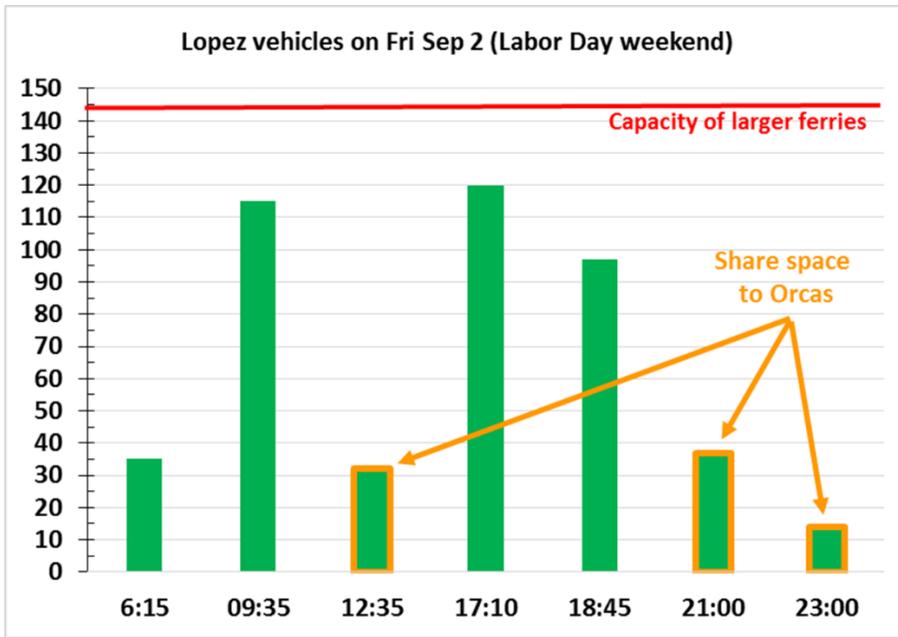


Figure 3. Vehicles on individual Anacortes-Lopez sailings on a busy day (Friday Sep 2, 2017).

Additional information about marinas and Port of Friday use levels

Marina slips on three main islands

Marina	Slips
Port of FH	500
Roche Harbor	378
Shipyards cove	120
SYC outstation	75
Jensen	55
Snug Harbor	50
Fish Creek	46
Brown Island	36
Sub-total San Juan	1,260
West Sound	180
Deer Harbor	98
Cayou Quay	80
Rosario	50
West Beach	9
Lieber Haven	8
Sub-total Orcas	425
Spencer's Landing	110
Islands Marine Center	80
Islander	65
Sub-total Lopez	255
Total marinas – three islands	1940
Anchorage moorages – three islands	270
Total all three islands	2,210

Summer use statistics from Port of Friday Harbor

	Jun	Jul	Aug
Port – transient boats per month	1,859	3,732	3,856
Port – transient boats per day	62	120	124
Port walk-on ferry pax per month	18,234	29,052	28,373
Port walk-on ferry pax per day	608	937	915
US customs estimates – check-ins from Canada	25	35	35
Total boat nights	1,922	3,720	3,844