



Pierce County, Washington

Comprehensive Profile of Visitors to Pierce County

Prepared by:



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Background and Introduction

This report presents the results of visitor profile research conducted in Pierce County, Washington in the year between October 1, 2015 and September 30, 2016.

The goal of the research, which was conducted by DPA on behalf of the county's Economic Development Department, is to allow the county and its travel industry stakeholders to better understand and monitor travelers and travel patterns over the course of a year.

The specific goals were to describe:

- Characteristics of trips to the county;
- Visitor and travel party demographics;
- Visitor expenditures;
- The process of travel planning and the sources of information used;
- Views toward Pierce County; and
- Satisfaction with the travel experience in the county.

In addition, the research was designed to provide profiles of specific subgroups of travelers.

The body of this report shows the information collected from all travelers over the course of the survey window. (Only valid, usable responses for each item or question were used, so the base size for the total answering population may not always add to the total number of respondents.)

Profiles of traveler subgroups are presented in the Appendix.

Methodology

The survey was conducted on paper questionnaires distributed at hotels, special events, and indoor and outdoor attractions across the county. Questionnaires were distributed during all daylight hours on weekdays and weekends. On average, interviewing was conducted 13 days per month; each interview day could include multiple locations, and each survey location could have been used for more than one day.

All respondents were at least 18 years old and either lived 50 miles or more outside the county or were staying overnight in the county.

A total of 2,629 travelers qualified for and agreed to take part in the research. The margin of error of the total survey results, at the 95% confidence level, is +/-1.9 percentage points. (Subgroups may have larger margins of error, depending on size.)

The number of interviews collected each month is shown below.

Month	Number of Completed Surveys
October 2015	48
November 2015	77
December 2015	51
January 2016	389
February 2016	576
March 2016	132
April 2016	168
May 2016	159
June 2016	265
July 2016	272
August 2016	241
September 2016	251
Total	2,629

The following table shows the distribution of interviewing across specific jurisdictions of the county. Most of the completed surveys were collected in Tacoma (64%), with 19% collected on or around Mt. Rainier. Fewer surveys were collected in Puyallup or Sumner (8%); the areas of DuPont, Lakewood, or South Tacoma (6%); or in Gig Harbor (3%).

Area	Percent of Completed Surveys
Tacoma	64%
Mt. Rainier/Crystal Mountain (Ashford, Elbe, Eatonville, Crystal, Paradise)	19%
Puyallup/Sumner	8%
DuPont/Lakewood/South Tacoma	6%
Gig Harbor	3%

The table below shows the specific types of venues where interviewing was conducted. Much of the surveying took place at lodging properties (37%) or museums (33%), though many visitors were surveyed at attractions (18%) or events (13%).

Venue	Percent of Completed Surveys
Hotel/Motel/Resort	37%
Museum	33%
Attraction	18%
Event	13%

Finally, the following table compares where survey respondents were staying overnight in the county (among those who were staying overnight) and the relative number of paid lodging rooms available in those locations.

This comparison suggests that the number of overnight guests surveyed in specific regions of the county is broadly representative of the geographic distribution of rooms available for travelers.

Area	Percent of Overnight Respondents Staying in Area	Percent of Rooms Available in Area*
Tacoma	58%	46%
DuPont/Lakewood	12%	16%
Puyallup	5%	15%
Other areas	25%	23%

* The census information above was provided by Smith Travel Research and does not measure Mt. Rainier or Joint Base Lewis-McChord (JBLM) separately. Surveying was not conducted directly on JBLM.

Key Findings/Visitors at a Glance (Graphics)

Profile of Travelers and Travel Parties

**Average household
income: \$98,000**

**Generally from the
West: top origin states
include Washington,
Oregon, and California.**

70% are married.

**Average travel party:
about 3 people**

Average Age: 46

**32% of visitors are
accompanied by minor
children.**

Profile of Trips

70% of responding travelers have **visited previously**.
Travelers to the county visit about **once a year on average**.

64% drive to the area.
Roughly **half begin planning or booking** their trip within a **month** of their visit.

Average length of stay: 3
nights.
87% of responding overnight visitors* stay in a hotel or **B&B** off JBLM.

*Surveying did not take place on JBLM.

80% visit the county for **vacation or personal purposes**.
Top reason for choosing the county: Visiting family and friends.

Most common activities:

- * Dining out
- * Sightseeing

Average spending:
\$1,381 per-party per-trip or
\$119 per-person per-day

Traveler Satisfaction

88% of surveyed travelers are satisfied with their trip to Pierce County.
54% are *very* satisfied.

76% would recommend the county.
45% *definitely* would recommend it.

82% say they are likely to return to the area at some point in the future; 64% are likely to do so within the next year.

Key Findings/Visitors at a Glance (Text)

Traveler Profile

- Average household income: \$98,000.
- Generally from the West.
 - Top origin states include Washington, Oregon, and California.
- 70% are married.
- Average travel party: about 3 people.
- Average Age: 46.
- 32% of visitors are accompanied by minor children.

Trip Profile

- 70% of responding travelers have visited previously.
 - Travelers to the county visit about once a year on average.
- 64% drive to the area; almost all of the rest fly.
- Roughly half begin planning or booking their trip within a month of their visit.
- Average length of stay: 3 nights.
- 87% of responding overnight visitors stay in a hotel or B&B off JBLM.
- 80% visit the county for vacation or personal purposes.
- Top reason for choosing the county is to visit family and friends.
- Most common activities:
 - Dining out;
 - Sightseeing.
- Average spending:
 - \$1,381 per-party per-trip or
 - \$119 per-person per-day.

Traveler Satisfaction

- 88% of surveyed travelers are satisfied with their trip to Pierce County;
 - 54% are *very* satisfied.
- 76% would recommend the county;
 - 45% *definitely* would recommend it.
- 82% say they are likely to return to the area at some point in the future;
 - 64% are likely to do so within the next year.

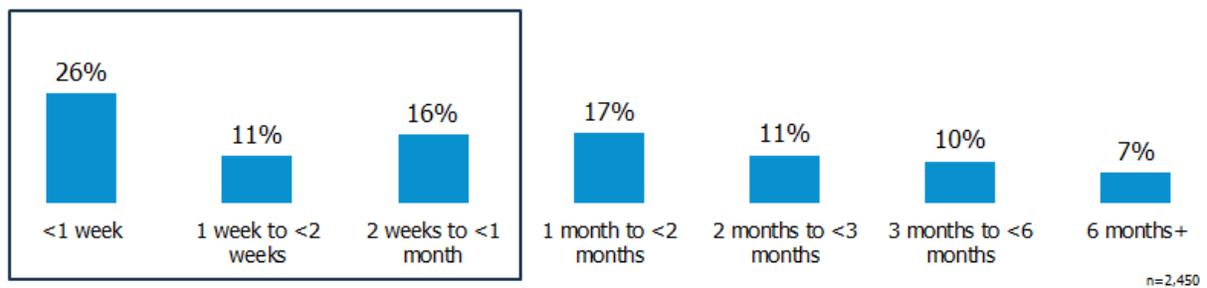
Detailed Findings

Travel Planning

Roughly half of all travelers surveyed between October of 2015 and September of 2016 began planning their trip to the county within one month of arriving (53%), with one-quarter planning their trip within one week of their visit (26%).

A total of 17% of surveyed travelers planned their trip three months or more before their visit, including 7% who planned six months or more before leaving home.

Timing of Travel Planning



Q4a. How far in advance of leaving for this trip did you begin planning your trip?

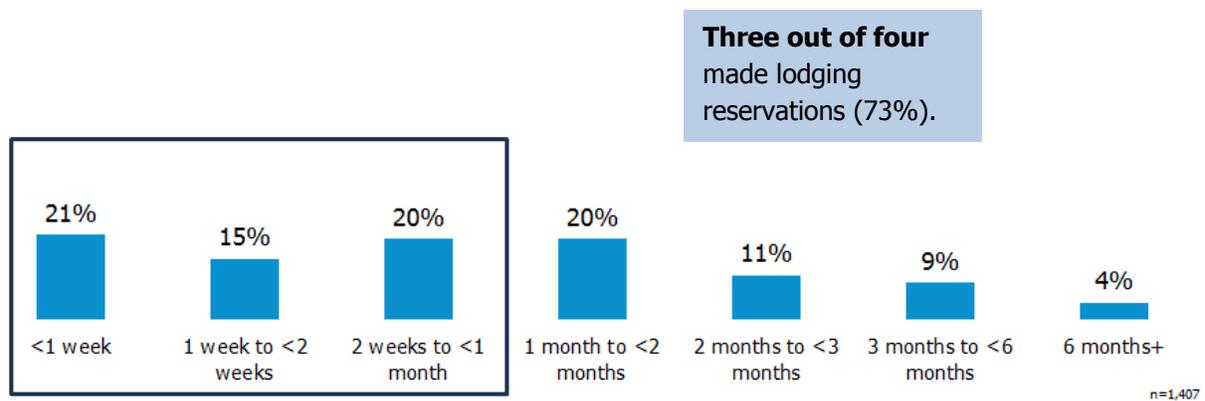
In all, three out of four surveyed visitors to the county made lodging reservations for their stay (73%).

Among those travelers, more than half made their lodging reservations within a month of leaving for Pierce County (55%), including 21% who made their reservations within a week of their trip.

Only 13% of travelers who made lodging reservations did so three months or more before leaving home.

Timing of Lodging Reservations

(Among those who made lodging reservations)

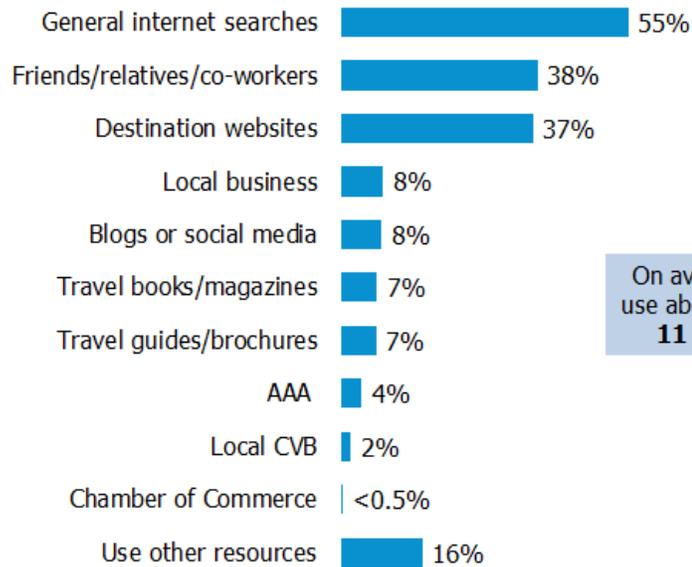


Q4b. How far in advance of leaving for this trip did you make lodging reservations?

General internet searches are, by far, the most popular planning resource for Pierce County’s visitors (used by 55% of responding travelers), followed by word of mouth (38%) and destination websites (37%). No other source was used by more than one out of ten visitors between the autumn of 2015 and the summer of 2016.

On average, surveyed travelers use approximately two of the eleven planning resources listed on the survey.

Planning Resources Used



On average, visitors use about **2 of these 11 resources.**

n=2,445

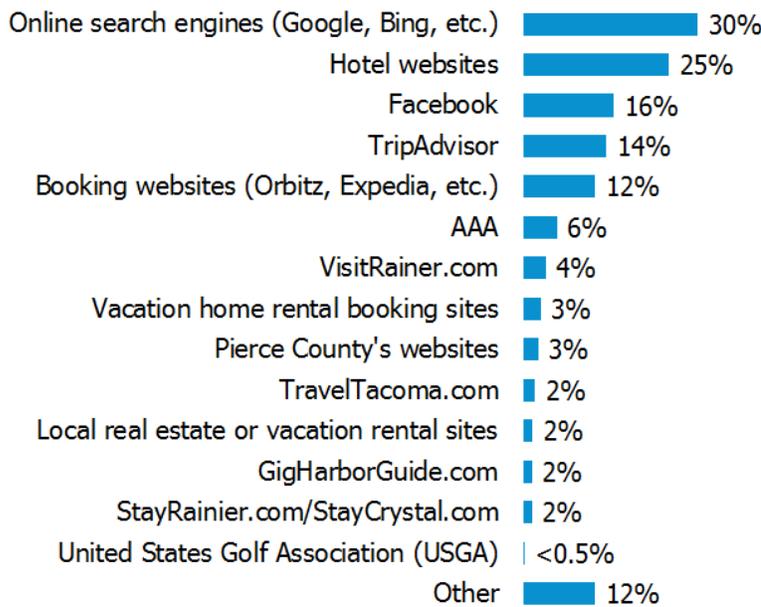
Q5. While planning this trip, did you: (Please select all that apply.)

Three out of four interviewed visitors to Pierce County used a website to plan their trip (76%).

Online search engines are the most common websites used by responding travelers (30%), followed by hotel websites (25%). Fewer – but still at least one out of ten visitors – use Facebook (16%), TripAdvisor (14%), or booking websites (12%).

No more than one out of twenty recall using any of the other nine specific websites tested in the survey.

Websites Used



76% visit one of these websites.

n=2,482

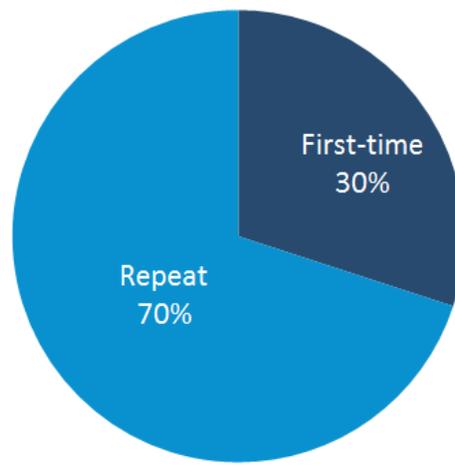
Q6. While planning this trip, did you use: (Please select all that apply.)

Trip Characteristics

The large majority of travelers to the county between October of 2015 and September of 2016 have been to the county more than once (70%).

In fact, the typical visitor comes to the county nearly once a year (four times in the five years prior to their most recent visit, on average).

Number of Visits to Pierce County



The **average** visitor has been to Pierce County **4 times in the past 5 years.**

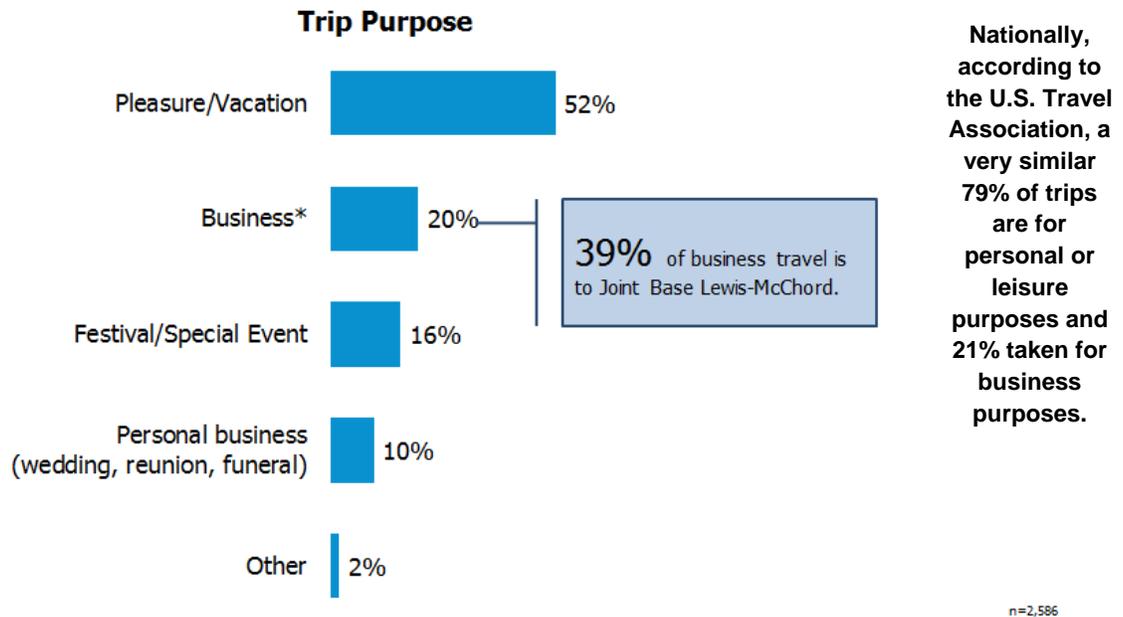
n=2,612
n=2,629

Q1. What is the **main** purpose of your trip to Pierce County?

The most common purpose of trips to Pierce County is pleasure or vacation, accounting for a slight majority of all travel to the county within the survey period (52%).

Business (20%) and festivals or other special events (16%) drive most other trips to the county, though 10% of visitors come for personal business.

Many of those who travel to the county for business say they have business on Joint Base Lewis-McChord (39%).



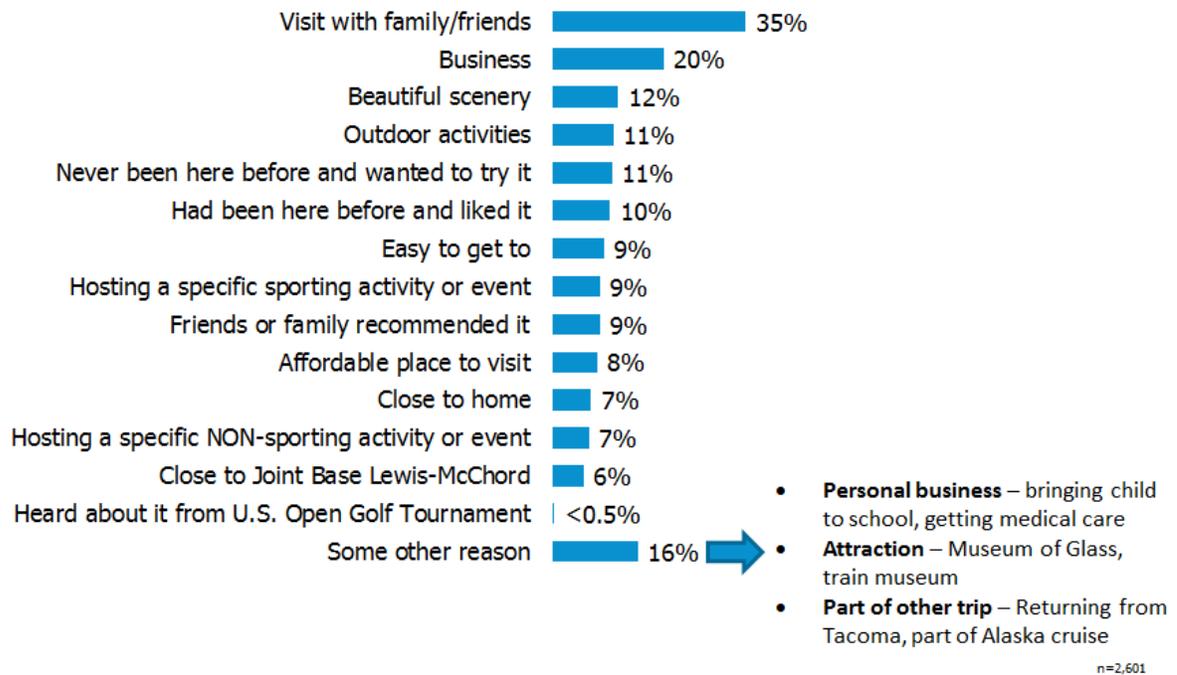
Q1. What is the **main** purpose of your trip to Pierce County?

*Note: A more detailed description of business travel purposes is presented in the Appendix of this report.

When asked why they chose to come to Pierce County specifically, responding travelers are most apt to say they were visiting family or friends (35% overall say it was a factor in their destination decision), followed by business reasons (20%).

Beyond these key selection drivers, travelers choose Pierce County for a variety of other reasons, though none is a factor for more than about one out of ten surveyed visitors.

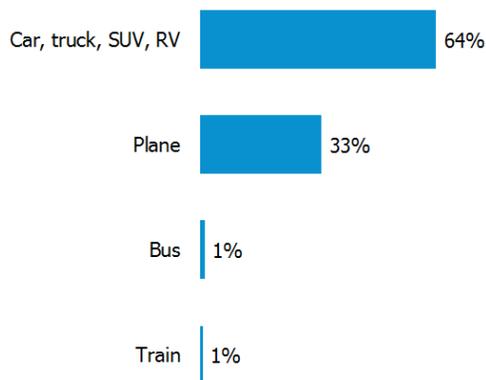
Reasons for Choosing Pierce County



Q7. Which of the following reasons best describe why you chose this destination? (Please select all that apply.)

Two out of three travelers between October of 2015 and September of 2016 came to the county by car (64%); nearly all of the rest came by plane (33%).

Mode of Transportation

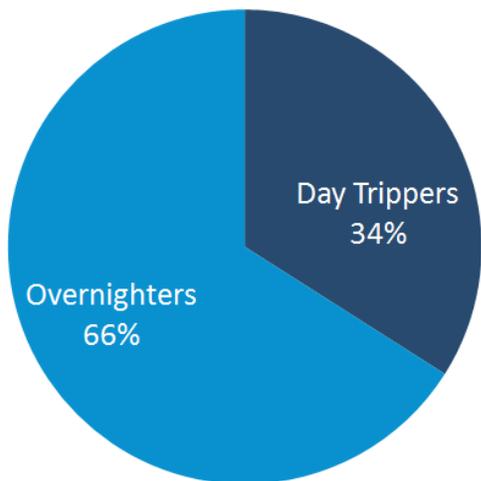


n=2,565

Q8. How did you travel to this area?

Two out of three responding travelers in the survey period stayed overnight in the county (66%), with a typical stay of about three nights overall.

Length of Visit



Number of Nights
(Among all travelers)

Mean	3.23
------	------

This is very similar to national travel overall; according to the U.S. Travel Association, 31% of trips last for just a day, and the remaining 69% of trips last one or more nights.

n=2,625

Q9. How many nights in total do you intend to stay in Pierce County on this trip?

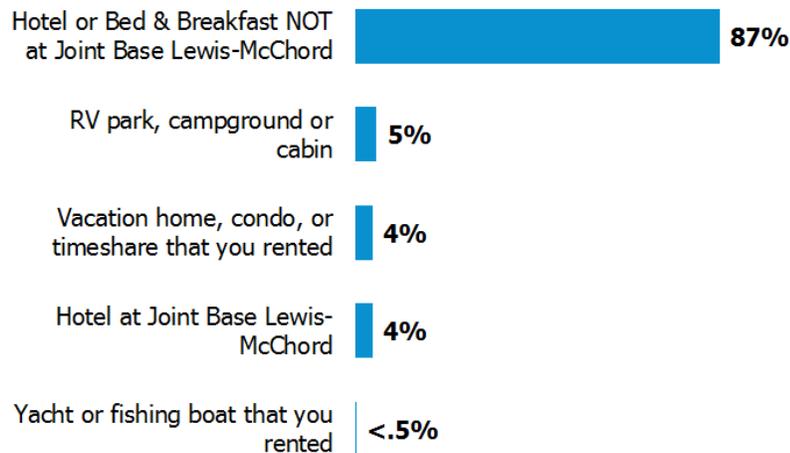
Eight out of ten *overnight* visitors stay in paid lodging in the county (81%), which amounts to 53% of *all* travelers.

Off-base hotels and bed and breakfasts are by far the most common type of paid accommodation, used by nearly nine out of ten who are staying in paid accommodations (87%).

No more than one out of twenty overnight visitors stay in any of the other paid accommodations listed in the survey.

Type of Paid Accommodations Used

(Among those who used paid accommodations)



n=1,390

Q11. What type of lodging are you staying in?

Note: Interviewing was not conducted on JBLM, which may have impacted these results. The base has over 600 hotel rooms, and further research would be required to understand how those staying on the base may differ from those staying off-base.

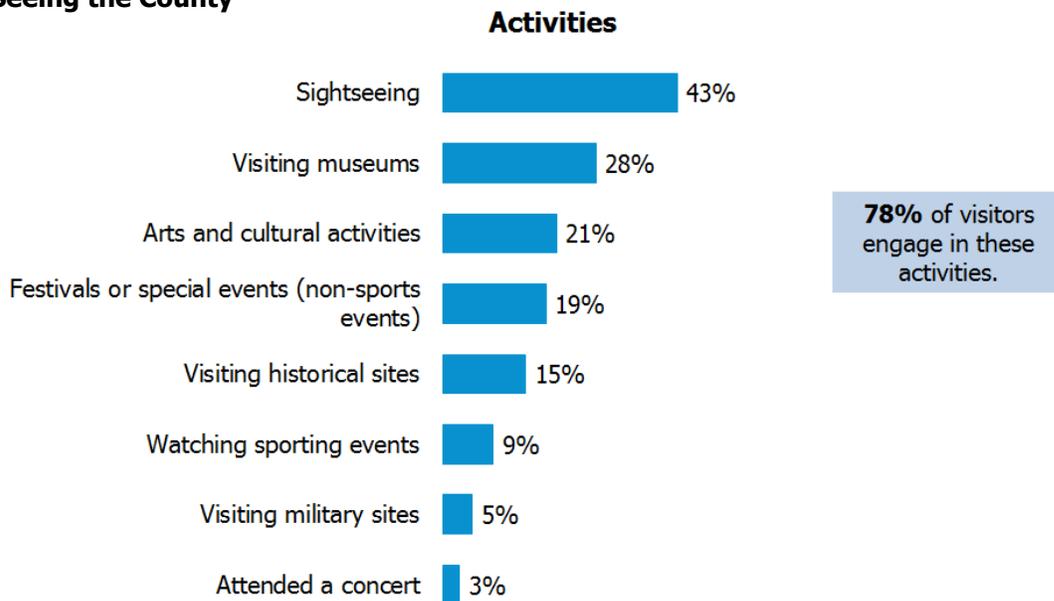
Visitors to Pierce County take part in a broad array of activities on their trips, including those that involve seeing the county, entertainment and recreation, and outdoor interests.

Eight out of ten visitors who responded to the survey engaged in one or more of the eight listed activities that involve seeing the area (78%), the most popular of which is sightseeing (43%).

Noteworthy shares of travelers also say they visited a museum (28%), took part in an artistic or cultural activity (21%), went to a festival or special event (19%), visited historical sites (15%), or went to a sporting event (9%).

A few others visited military sites (5%) or went to a concert (3%).

Seeing the County



n=2,354

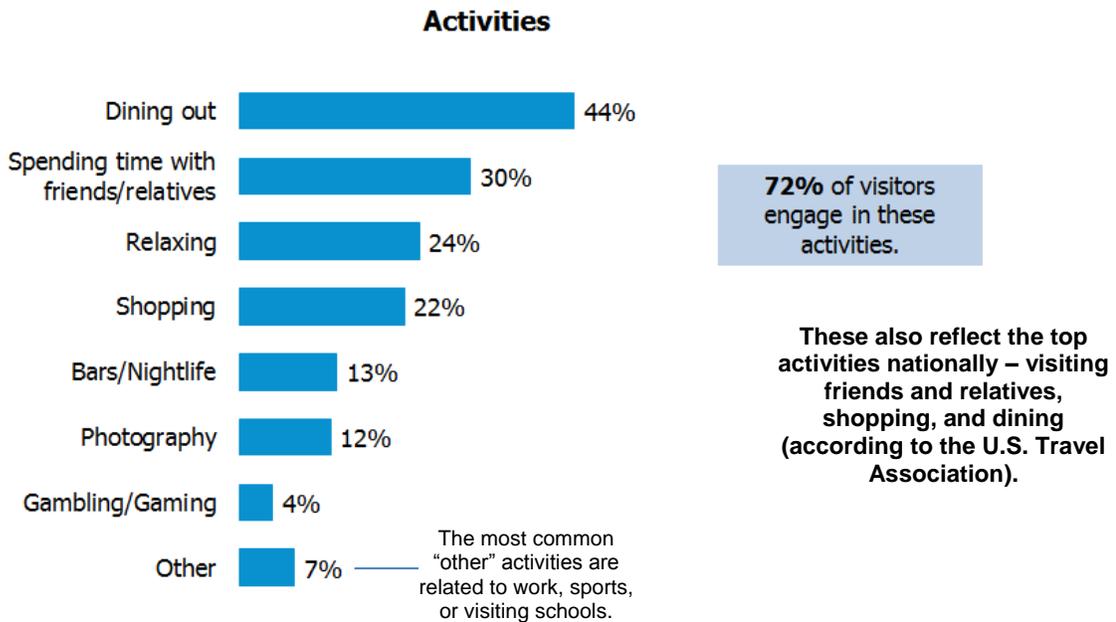
Q17. What activities or interests are you taking part in while in Pierce County? (Please select all that apply.)

Seven out of ten responding visitors overall engaged in any of the seven entertainment and recreation activities listed in the survey (72%), with the most common of those activities being dining out (44%).

An additional three out of ten spent time with friends or relatives while in the county (30%), and just over two out of ten relaxed (24%) or went shopping (22%).

Closer to one out of ten visitors went to bars (13%) or engaged in photography (12%) once in the county. Four percent gambled on their trip.

Entertainment and Recreation



n=2,354

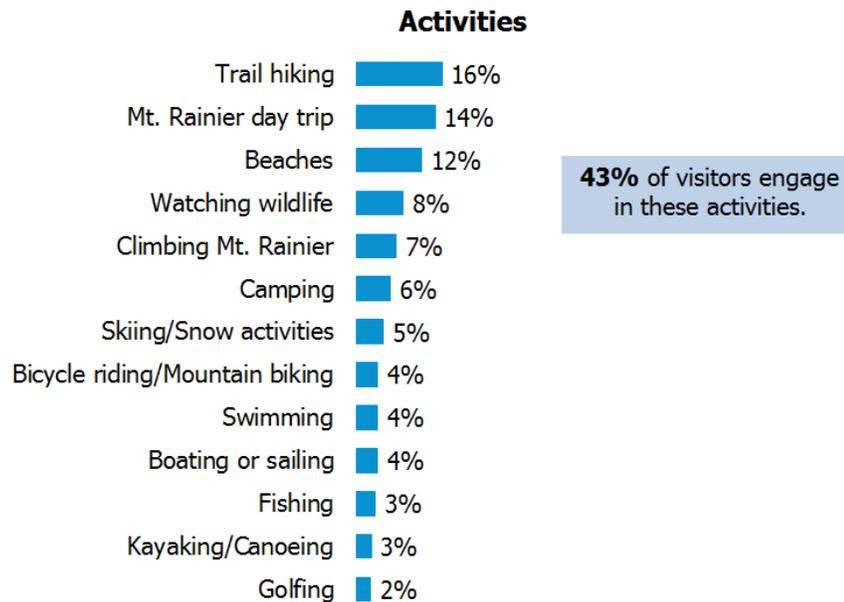
Q17. What activities or interests are you taking part in while in Pierce County? (Please select all that apply.)

Four out of ten visitors to Pierce County took part in any of the 13 surveyed outdoor activities on their trip (43%), though relatively small shares engage in any specific activity.

The most common of these outdoor activities are hiking (16%), taking a day trip to Mount Rainier (14%), and going to the beach (12%).

No more than 8% of surveyed travelers engage in any of the ten other outdoor activities listed in the survey.

Outdoor Activities

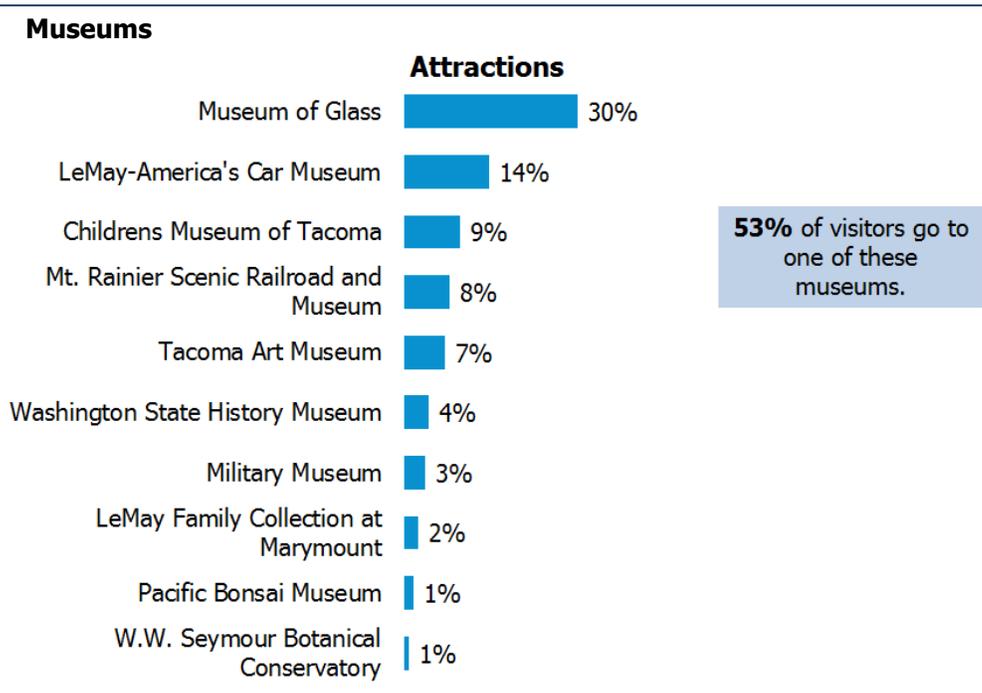


n=2,354

Q17. What activities or interests are you taking part in while in Pierce County? (Please select all that apply.)

One-half of surveyed travelers visited any of ten listed exhibition spaces in the survey year (53%).

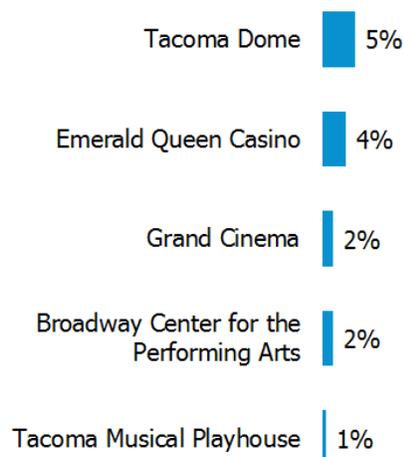
One out of three surveyed travelers went to the Museum of Glass (30%), and roughly one out of ten visited the LeMay Car Museum (14%), the Children’s Museum (9%), the Mt. Rainier Scenic Railroad and Museum (8%), or the Tacoma Art Museum (7%).



Q18. On this trip, which attractions are you visiting? (Please select all that apply.)

Note: Much of the interviewing was conducted at museums – in particular the Museum of Glass – which may have impacted the data shown here.

One out of ten surveyed travelers went to a listed arts or cultural attraction (11%) – most often to the Tacoma Dome (visited by 5% of travelers) and the Emerald Queen Casino (4%).

Arts & Culture**Attractions**

11% of visitors go to one of these attractions.

Q18. On this trip, which attractions are you visiting? (Please select all that apply.)

n=2,117

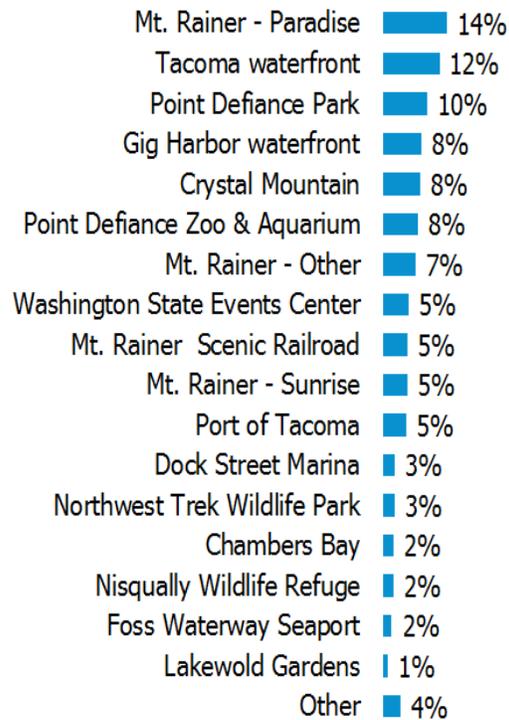
Travelers to Pierce County visit a wide variety of outdoor attractions; more than half visited one of the seventeen listed outdoor destinations between October of 2015 and September of 2016 (56%), though no more than about one out of ten went to any individual outdoor venue listed on the survey.

The largest shares of visitors went to a Mountain-based attraction, including Paradise (14%), Crystal Mountain (8%), the Scenic Railroad (5%), Sunrise (5%), or another part of Mt. Rainier (7%).

Waterfront activities are also popular: 12% of travelers went to the Tacoma waterfront and another 8% went to Gig Harbor’s waterfront.

Outdoor

Attractions



56% of visitors go to one of these outdoor attractions.

n=2,117

Q18. On this trip, which attractions are you visiting? (Please select all that apply.)

On average, travel parties spend approximately \$1,400 over the course of their trips to Pierce County.

Together, about half of trip spending is devoted to food (27%, amounting to an average of \$366 per travel party across the course of their trip) or lodging (25%, \$350 per-party per-trip).

The typical travel party spends closer to \$200 on shopping (\$197) and recreation or entertainment (\$187), each of which accounts for 14% of the average travel party’s expenditures.

About ten percent of the average travel party’s spending is devoted to either car rental (10%, amounting to \$138) or gasoline (8%, \$114).

Total Spending Per Travel Party Per Trip	Spending (Survey)	% of Spending (Survey)	% of National Spending (U.S. Travel Association)
Food & Beverages	\$366	27%	21%
Lodging & Accommodations	\$350	25%	25%
Shopping	\$197	14%	10%
Recreation or Entertainment	\$187	14%	10%
Car Rental	\$138	10%	35% (all “auto transportation”)
Gasoline	\$114	8%	
Everything else	\$29	2%	
Total	\$1,381		

Each traveler, on average, spends \$119 per day in Pierce County, which includes approximately \$32 on food and beverages and \$30 on lodging and accommodations.

The typical traveler spends \$17 on shopping each day and \$16 on recreation or entertainment.

Individual travelers spend \$12 on car rental and \$10 on gasoline each day in the county.

Daily Spending Per Person	Spending
Food & Beverages	\$32
Lodging & Accommodations	\$30
Shopping	\$17
Recreation or Entertainment	\$16
Car Rental	\$12
Gasoline	\$10
Everything else	\$3
Total	\$119

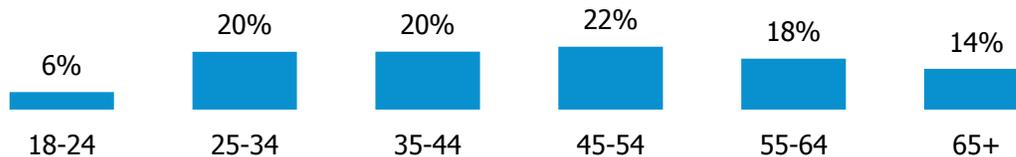
Visitor Party Characteristics

Surveyed travelers represent a relatively even mix of ages, with an average age of 46 overall. Two out of ten each are between the ages of 25 and 34 (20%), 35 and 44 (20%), 45 and 54 (22%), or between the ages of 55 and 64 (18%).

Closer to one out of ten visitors are younger (6% are 18 to 24) or older (14% are 65 years of age or older).

Ages of Respondents

Average Age: 46 years



Q27. What is your age?

n=2,330

The average household income of surveyed travelers to Pierce County is approximately \$98,000.

Roughly one out of five responding travelers each say their household makes under \$50,000 (16%), between \$50,000 and \$74,999 (19%), \$75,000 to \$99,999 (21%), \$100,000 to \$149,999 (23%), or \$150,000 or more (20%).

Household Income

Average Income: \$97,900



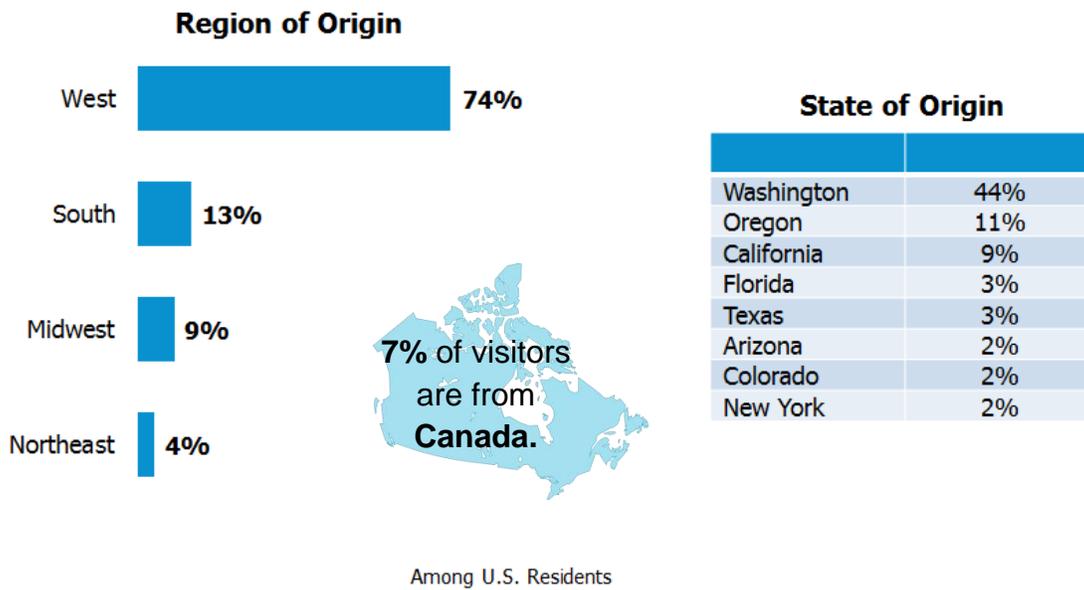
Q29. What is your total annual household income before taxes?

n=1,906

Three out of four American visitors surveyed are from the western part of the United States (74%); almost all of the rest live in either the South (13%) or Midwest (9%), with only a handful of responding travelers from the Northeast (4%).

More than half of all American respondents are from out of state (56%). After Washington, the two top states of respondent origin are Oregon (11% of all surveyed travelers) and California (9%).

Seven percent of surveyed visitors over the course of the survey year are from Canada.

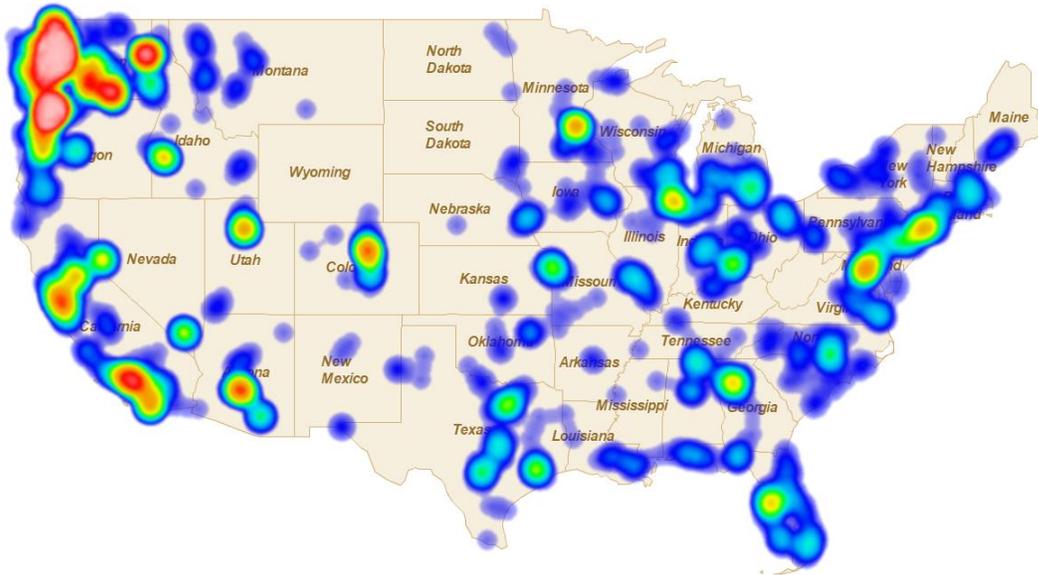


n=2,277

Q25. Are you currently a resident of:

The map below shows the relative proportion of surveyed travelers who come to the county based on the ZIP code of their primary residence. On the map, red correlates to a higher number of visitors from that area, followed by orange, yellow, green, and blue.

Area of Origin (Based on ZIP Code)



Q25. Are you currently a resident of:

n=2,277

The large majority of surveyed travelers are married (70%), with an equal share of men (50%) and women (50%) interviewed as part of this research.

Respondent Demographics	
Marital status	
Married	70%
Single	25%
Other	5%
Gender	
Male	50%
Female	50%

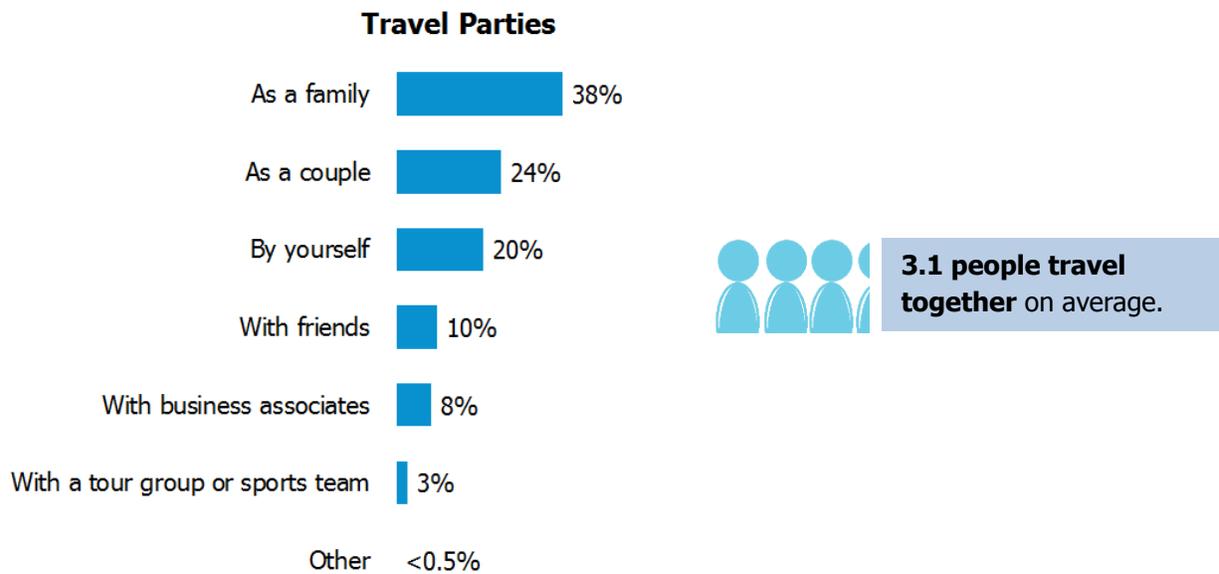
Q28. Are you: Married/Single/Other
Q26. Are you: Male/Female

n=2,521
n=2,493

The typical travel party to the county consists of about three people.

The largest share of visitors overall travel with family members (38%), though many travel as a couple (24%) or alone (20%).

Smaller shares travel with friends (10%) or business associates (8%), with a few traveling as part of a tour group or sports team (3%).



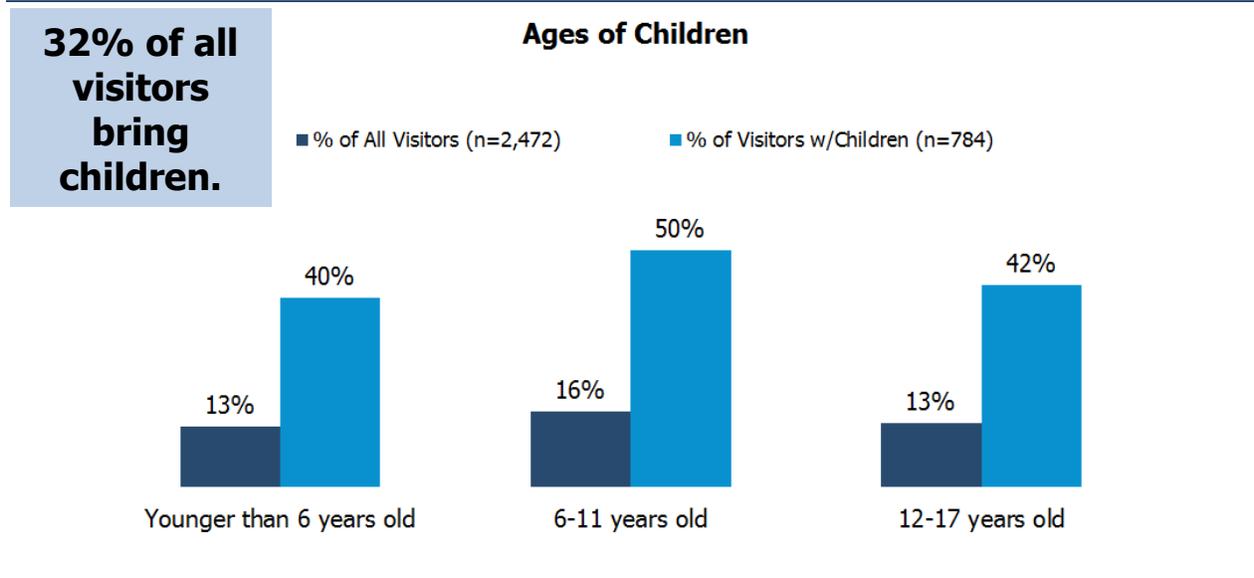
n=2,501
n=2,629

Q13. On this trip are you traveling:

Q14. Including yourself, how many people are in your immediate travel party?

One-third of all visitors are traveling with minor children (32%).

Among those visitors, there is an even distribution in the ages of the children they're traveling with: 40% of visitors with children say their children are under 6 years old (amounting to 13% of *all* travelers); another 50% of family travelers are traveling with 6 to 11 year olds (16% of all travelers); and another 42% of those traveling with kids have 12 to 17 year olds with them (13% of all travelers).



Q15. How many of those people are: Younger than 6 years old / 6-11 years old / 12-17 years old / adults?

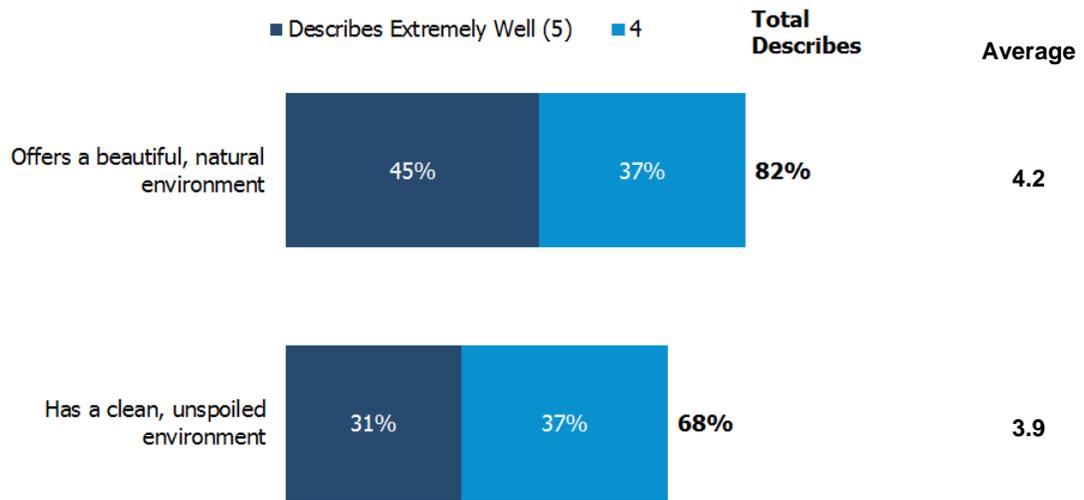
Views Toward Pierce County and Trip Satisfaction

As part of the survey, respondents were provided thirteen positive statements about the county’s nature and environment, entertainment options, hospitality, affordability, convenience, and its uniqueness. They were asked the extent to which each statement described the county. Overall, visitors believe each of the listed positive statements describe the county very well.

Specifically, eight out of ten responding travelers agree that the statement “Offers a beautiful, natural environment” describes the county (82% select a 4 or 5 on a 1 “does not describe at all” to 5 “describes extremely well” scale), and seven out of ten agree that the statement “Has a clean, unspoiled environment” describes the county (68%).

Nature & Environment

Views Toward Pierce County



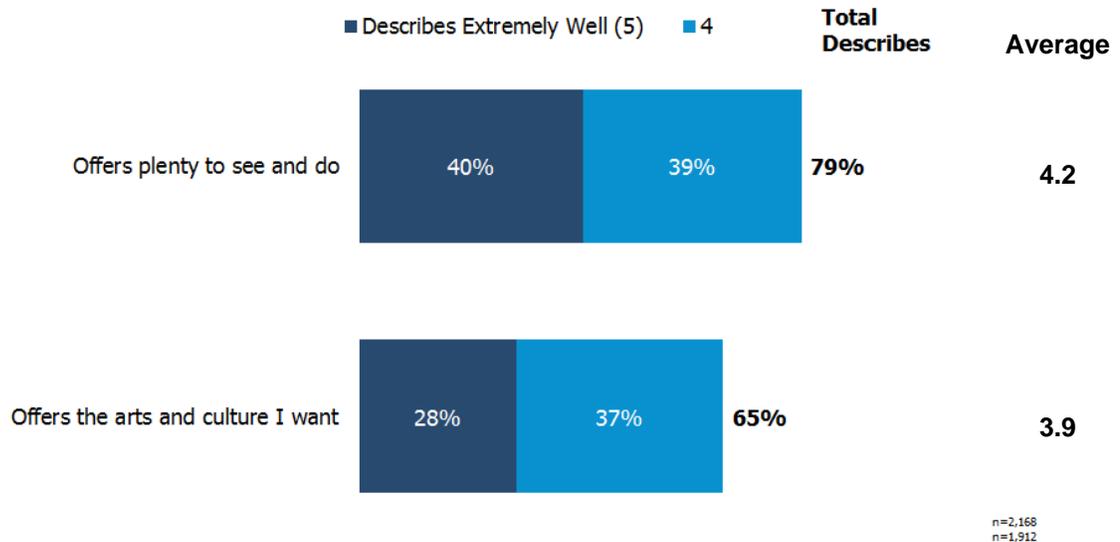
n=2,296
n=2,140

Q20. How well do you believe the following describe Pierce County?
(Scale: 1 – Does not describe at all to 5 – Describes extremely well)

Similar shares believe the county “Offers plenty to see and do” (79% select a 4 or 5 on the five-point scale), or “Offers the arts and culture I want” (65%).

Entertainment

Views Toward Pierce County

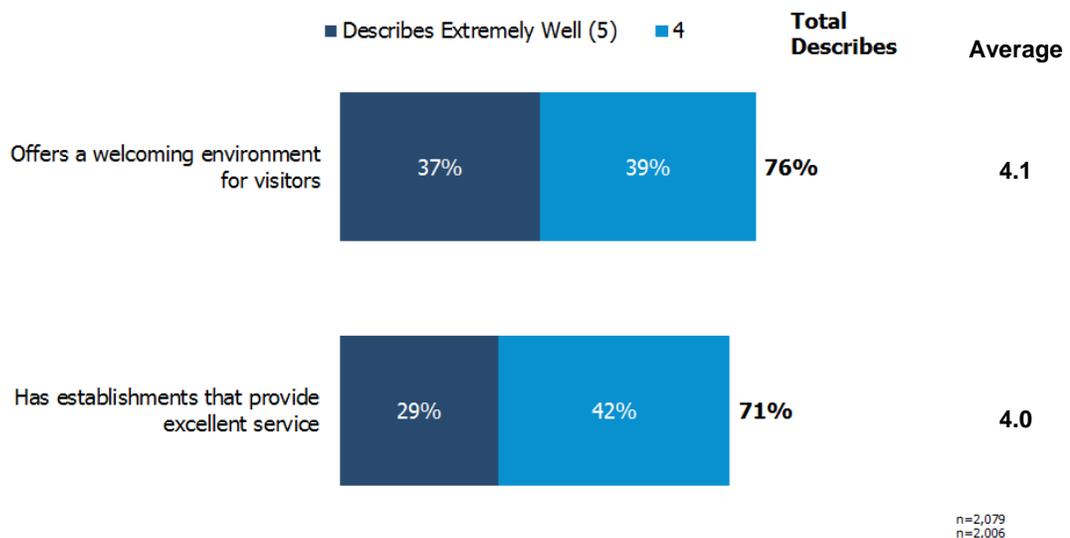


Q20. How well do you believe the following describe Pierce County?
(Scale: 1 – Does not describe at all to 5 – Describes extremely well)

Three out of four visitors agree that the county “Offers a welcoming environment for visitors” (76%), with nearly as many believing the county “Has establishments that provide excellent service” (71%).

Hospitality

Views Toward Pierce County

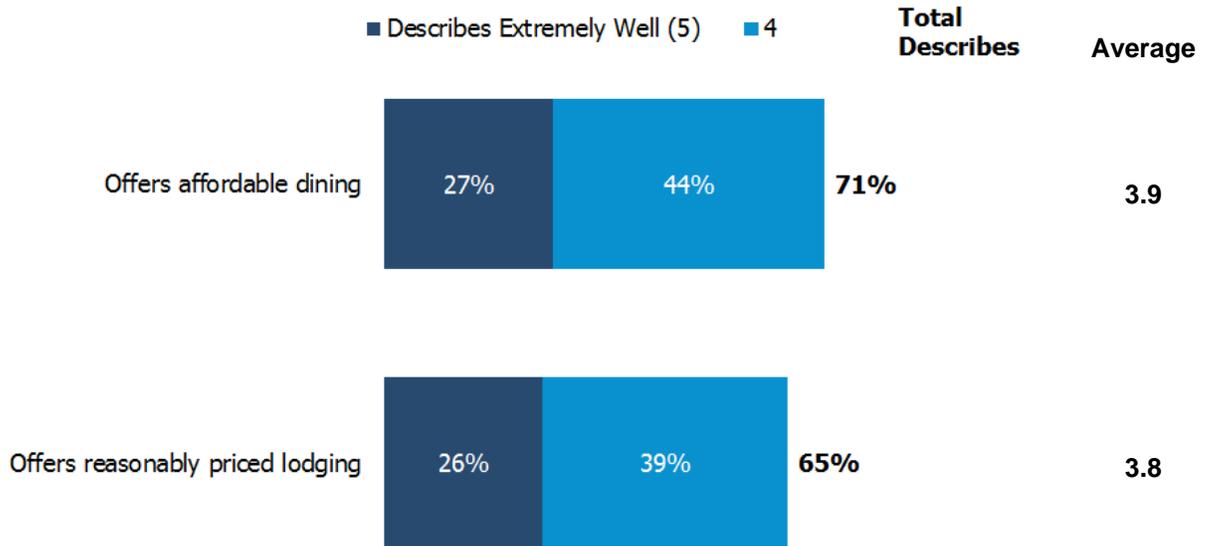


Q20. How well do you believe the following describe Pierce County?
(Scale: 1 – Does not describe at all to 5 – Describes extremely well)

Most also feel that traveling to Pierce County is affordable – seven out of ten believe that “Offers affordable dining” describes the county (71%), with nearly as many believing the county “Offers reasonably priced lodging” (65%).

Affordability and Value

Views Toward Pierce County



n=2,068
n=1,897

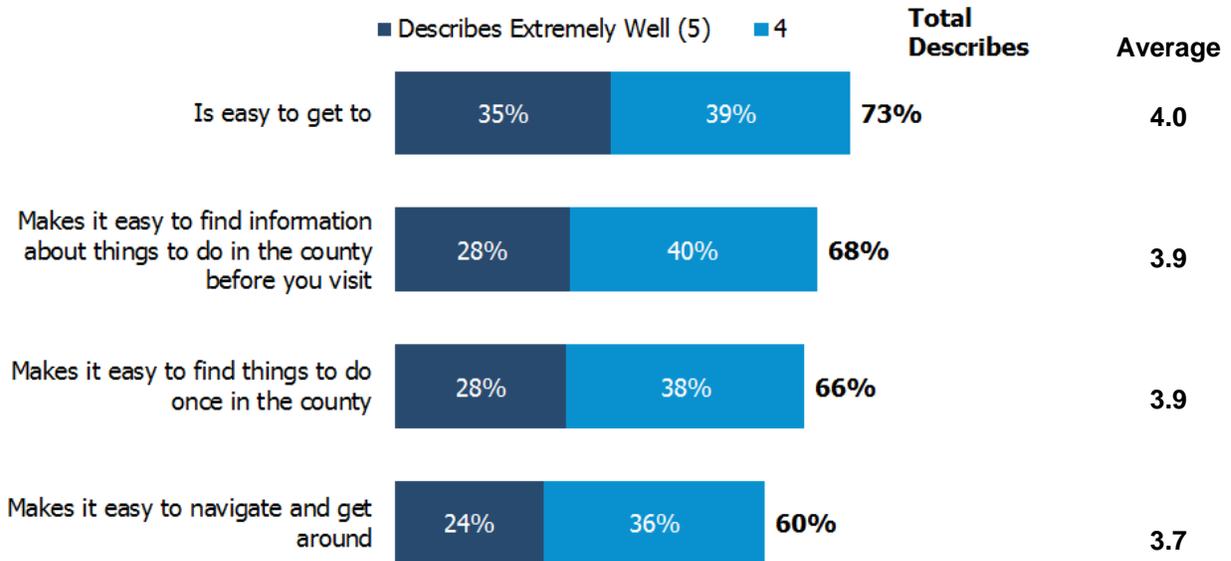
Q20. How well do you believe the following describe Pierce County?
(Scale: 1 – Does not describe at all to 5 – Describes extremely well)

Roughly seven out of ten visitors believe the county is described by several statements about its convenience, including: “Is easy to get to” (73%), “Makes it easy to find information about things to do in the county before you visit” (68%), or “Makes it easy to find things to do once in the county” (66%).

Fewer – but still six out of ten – believe the county is described by the statement “Makes it easy to navigate and get around” (60%).

Convenience

Views Toward Pierce County

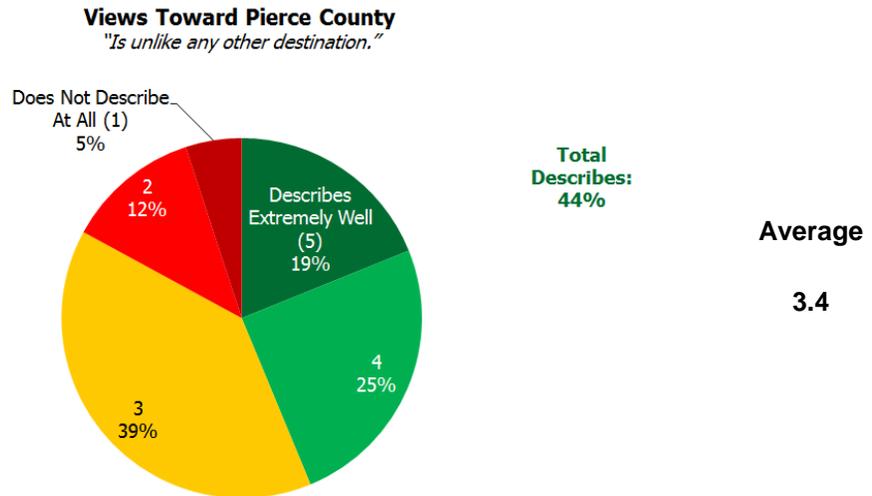


n=2,150
n=1,968
n=1,977
n=2,041

Q20. How well do you believe the following describe Pierce County?
(Scale: 1 – Does not describe at all to 5 – Describes extremely well)

Finally, more than four out of ten responding visitors believe that the statement “Is unlike any other destination” describes the county (44%), with almost all of the rest providing a more neutral rating of 3 (39%) on the 1 (“Does not describe at all”) to 5 (“Describes extremely well”) scale.

Uniqueness



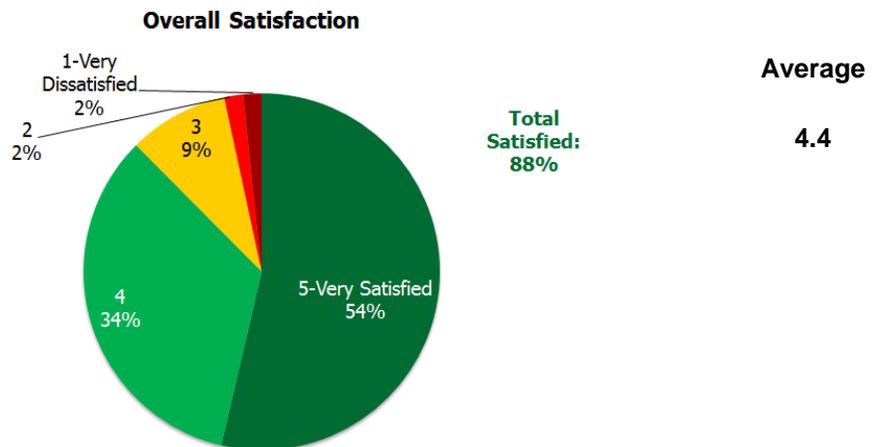
Q20. How well do you believe the following describe Pierce County?
(Scale: 1 – Does not describe at all to 5 – Describes extremely well)

n=1,946

In addition to the widespread agreement with the positive statements about the county, surveyed travelers to Pierce County also tend to be highly pleased with their experiences in the area.

Nine out of ten are satisfied with their visit overall (88%), including more than half who say they are *very* satisfied (54%).

Only a handful overall are dissatisfied with their visit to the county (4%).

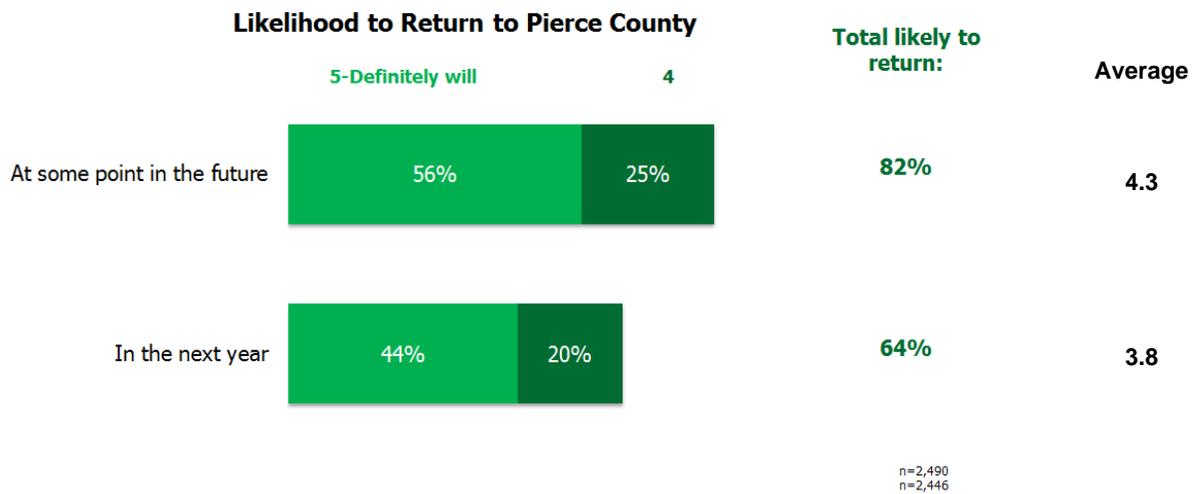


Q19. Overall, how satisfied are you with your stay in the area?

n=2,399

At the time of the survey, eight out of ten respondents planned to return to the county at some point in the future (82%), and most of those – amounting to 56% of all respondents – indicated that they *definitely* will return to the county.

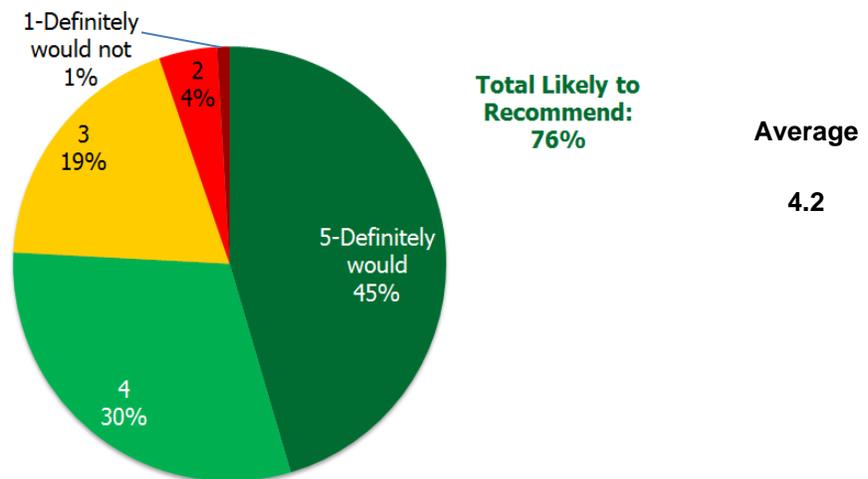
An additional six out of ten indicated that they are likely to visit the county again within one year (64%), including four out of ten who *definitely* will return within that time (44%).



Q23. How likely are you to visit Pierce County at some point in the future?
Q24. How likely are you to visit Pierce County in the *next year*?

Finally, three out of four interviewed visitors would recommend Pierce County to family or friends for a vacation (76%), with four out of ten saying they *definitely* would recommend the county (45%).

Likelihood of Recommending Pierce County



Q22. If asked, how likely would you be to recommend Pierce County to family or friends for a vacation or getaway trip?

n=2,475

Appendix: Profile of Traveler Subgroups

This appendix profiles specific subgroups of travelers to Pierce County between October 1 of 2015 and September 30 of 2016, and points out relevant differences and similarities between traveler types on key demographic and trip characteristics.

The subgroups profiled include:

- Business (n=522) and leisure (n=2,064) travelers;
- Washington residents (1,003) and residents of other states (n=1,274);
- Mountain visitors (n=644) and non-mountain visitors (n=1,985);
- First-time (n=780) and repeat (n=1,832) visitors;
- Day (n=898) and overnight (n=1,707) visitors;
- Overnight visitors staying in paid (n=1,390) or unpaid (n=317) accommodations;
- Travelers in each of the four seasons across the year-long interviewing period (Fall: n=125; Winter: n=1,016; Spring: n=459; Summer: 1,029);
- Easterners (n=495) and Westerners (n=1,736);
- Drivers (n=1,646) and flyers (n=848).

Differences between the traveler subgroups that rise to the level of statistical significance are shown by a "+" or, for the seasonal comparison, a letter next to the subgroup percentage that is larger.

Business and Leisure Travelers

Detailed Trip Purposes

Twenty percent of all surveyed visitors to the county between October of 2015 and September of 2016 indicated that the primary purpose of their trip was business – whether on Joint Base Lewis-McChord (39% of business travelers) or off-base (61%). These visitors are profiled as business travelers below.

The remaining 80% of visitors to the county in the survey window visited for pleasure or vacation; a festival or special event; personal business; or other reasons. These visitors are described as leisure travelers below.

Original Business Categories	Business Travelers	Leisure Travelers
Pleasure/Vacation		65%
Festival/Special Event		20%
Personal business (wedding, reunion, funeral)		13%
Other reasons		2%
Business (convention, meeting, training) not at Joint Base Lewis-McChord	61%	
Business (convention, meeting, training) at Joint Base Lewis-McChord	39%	

n=2,586

The questionnaire was modified in June of 2016 in order to capture more specific forms of business travel. Among business travelers who responded in this timeframe, the largest share – about four out of ten overall – were engaged in some form of business travel at JBLM (43%). Two out of ten came for a business meeting off the base (21%), and about one out of ten each were visiting a corporate office (13%), being trained (13%), or attending a convention or conference (10%).

Refined Business Categories	Business Travelers (June-September)
Business (convention, meeting, training) at Joint Base Lewis-McChord	43%
Business - meeting with a customer or client (not at JBLM)	21%
Business - visiting a field office or headquarters (not at JBLM)	13%
Business - training (not at JBLM)	13%
Convention, conference, or trade show (not at JBLM)	10%

Business travelers between June and September of 2016: n=143

Traveler Profile

On average, business travelers are younger than leisure travelers (43 vs. 47 years of age) and have slightly higher incomes (\$104,000 vs. \$97,000).

Seven out of ten business (71%) and leisure (70%) travelers are married.

Half of business travelers visit the county alone (50%), compared to only 12% of leisure travelers who have no one else in their travel party. Accordingly, business travelers are much less likely than their leisure traveling counterparts to be traveling with children (7% vs. 38%), and tend to have smaller travel party sizes overall (2 people total, compared to 3 people for leisure travelers).

Both business and leisure travelers come to the county once a year, on average.

	Business Travelers	Leisure Travelers
Average age	43	47+
Household income (average)	\$104,000+	\$97,000
% married	71%	70%
% traveling with children	7%	38%+
Travel party size (average number of people)	2.4	3.3+
% traveling alone	50%+	12%
% from Washington	21%	50%+
Number of visits to the county in last 5 years (average)	4	4

Trip Profile

The typical business traveler spends six nights in the county on average, while the typical leisure traveler spends closer to two nights in the county.

Due in large part to their longer stays in the county, business travelers also spend much more on their trips, on average: almost \$2,700 vs. \$1,100 per party per trip.

	Business Travelers	Leisure Travelers
Length of trip (average number of nights)	6.3+	2.5
% Staying overnight	94%+	59%
Travel party spending (average per-party, per-trip)	\$2,685+	\$1,050
Traveler spending (average per-person, per-day)	\$144+	\$107

Attractions

Perhaps predictably – business travelers tend to visit fewer museums than leisure travelers (visiting .6 out of 10 museums listed on the survey, compared to .9 for leisure travelers, on average) and outdoor attractions (.6 vs. 1.1 out of 17 outdoor attractions, on average). There is no difference between business and leisure travelers in the number of arts and cultural attractions they visit (an average of .1 such attractions for each group).

	Business Travelers	Leisure Travelers
Average # of museums visited (out of 10)	.6	.9+
Average # of arts and cultural attractions visited (out of 5)	.1	.1
Average # of outdoor attractions (out of 17)	.6	1.1+

Views Toward the County and Trip Satisfaction

Both business and leisure travelers are generally pleased with their trips to Pierce County, though leisure travelers have a slightly higher level of satisfaction with their trips than do business travelers (providing average ratings of 4.4 and 4.2, respectively, on a 5-point scale).

Leisure travelers are also slightly more apt than business travelers to say they are likely to return to the county (83% say they are likely to return at some point in the future, compared to 76% of business travelers).

	Business Travelers	Leisure Travelers
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.2	4.4+
Percent likely to return (% rating 4 or 5 on scale of 1: "Definitely will not" to 5: "Definitely will")	76%	83%+

While majorities of both business and leisure travelers to Pierce County believe that each of 13 positive statements describe the county, leisure travelers are more likely to believe that the county is described by almost all of the positive attributes listed in the survey.

Descriptiveness of Positive Statements		
About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")	Business Travelers	Leisure Travelers
Offers a beautiful, natural environment	75%	83%+
Offers reasonably priced lodging	70%+	63%
Offers plenty to see and do	73%	81%+
Has a clean, unspoiled environment	61%	70%+
Offers affordable dining	73%	70%
Is easy to get to	70%	74%
Offers the arts and culture I want	57%	67%+
Is unlike any other destination	62%	47%+
Has establishments that provide excellent service	70%	72%
Makes it easy to find information about things to do in the county before you visit	62%	70%+
Makes it easy to find things to do once in the county	61%	67%+
Makes it easy to navigate and get around	54%	61%+
Offers a welcoming environment for visitors	71%	77%+

Washington Residents and Residents of Other States

Traveler Profile

In all, forty-four percent of surveyed travelers to Pierce County are residents of Washington.

Compared to visitors from other areas, residents of Washington are slightly younger than those from other areas (44 vs. 48 years old) and have slightly lower incomes (\$95,000 vs. \$101,000).

Seven out of ten visitors, whether from Washington (69%) or other areas (72%) are married.

Washingtonians are more likely to be traveling with children (43%, compared to 23% of non-Washingtonians) and, likely as a result, tend to have larger travel parties (3.5 people, compared to 2.8 people, on average).

Visitors from Washington are also more likely to be visiting for leisure purposes (90%) than are those who do not live in the state (71%).

	Washington Residents	All Others
Average age	44	48+
Household income (average)	\$95,000	\$101,000+
% married	69%	72%
% traveling with children	43%+	23%
Travel party size (average number of people)	3.5+	2.8
% traveling alone	13%	25%+
Number of visits to the county in last 5 years (average)	6.6+	3.1
% traveling for leisure or personal reasons	90%+	71%

Trip Profile

Four out of ten residents who come from other areas of Washington are staying overnight in the county (44%), with an average stay of about one night; predictably, visitors to Pierce County who do not live in Washington stay much longer – eight out of ten stay overnight (81%), with an average total stay of about four nights.

Perhaps predictably, travelers from out of state spend much more in Pierce County (almost \$1,900 per-party per-trip, on average) than do those who live in Washington (about \$620).

	Washington Residents	All Others
Length of trip (average number of nights)	1.4	4.3+
% Staying overnight	44%	81%+
Travel party spending (average per-party, per-trip)	\$621	\$1,888+
Traveler spending (average per-person, per-day)	\$91	\$127+

Attractions

Overall, travelers who live in Washington visit roughly the same number of museums and outdoor attractions in Pierce County as their non-Washingtonian counterparts, though Washingtonians do tend to go to more arts and cultural attractions.

	Washington Residents	All Others
Average # of museums visited (out of 10)	.7	.8+
Average # of arts and cultural attractions visited (out of 5)	.2+	.1
Average # of outdoor attractions (out of 17)	.9	1.1

Views Toward the County and Trip Satisfaction

Residents of Washington and those who live out of state are equally pleased with their trips to Pierce County (each providing average ratings of 4.4 on a 5-point satisfaction scale). Predictably, however, residents of Washington (90%) are more likely than residents of other areas (76%) to say they will return at some point in the future.

Satisfaction With Trip	Washington Residents	All Others
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.4	4.4
Percent likely to return (% rating 4 or 5 on scale of 1: "Definitely will not" to 5: "Definitely will")	90%+	76%

Overall, many responding visitors – regardless of where they live – believe the county is described by most of 13 positive statements presented in the survey, though non-Washingtonians are more likely to believe that many of the statements describe the county highly.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")	Washington Residents	All Others
Offers a beautiful, natural environment	81%	83%
Offers reasonably priced lodging	59%	70%+
Offers plenty to see and do	80%	80%
Has a clean, unspoiled environment	64%	71%+
Offers affordable dining	67%	75%+
Is easy to get to	74%	74%
Offers the arts and culture I want	63%	67%
Is unlike any other destination	41%	46%+
Has establishments that provide excellent service	69%	74%+
Makes it easy to find information about things to do in the county before you visit	68%	69%
Makes it easy to find things to do once in the county	64%	68%
Makes it easy to navigate and get around	61%	59%
Offers a welcoming environment for visitors	75%	79%

Mountain Visitors and Non-mountain Visitors

Detailed Trip Purposes

One out of four travelers to Pierce County visited Mt. Rainier or engaged in a mountain-based activity between the autumn of 2015 and the summer of 2016 (24%). For the purposes of this analysis, these 'mountain visitors' are defined as those who:

- Stayed overnight on Mt. Rainier;
- Climbed Mt. Rainier, or took a day trip on the mountain;
- Visited the Mt. Rainier Scenic Railroad and Museum; or
- Went to Paradise, Sunrise, or another part of the county's mountains.

Traveler Profile

Generally speaking, travelers who visit the mountains are demographically very similar to those who do not visit the mountain in terms of age (mountain visitors and non-visitors are each 46 years old, on average), household income (\$96,000 for mountain visitors vs. \$98,000 for non-mountain visitors), and marital status (71%, 70%).

Perhaps predictably, mountain visitors (91%) are much more likely than those who do not visit the mountains (76%) to be traveling in the county for leisure or personal purposes.

Mountain visitors are also slightly more likely to travel with children (35% vs. 31%) and tend to have larger travel parties (3.6 people vs. 3.0 people, on average). At the same time, mountain visitors have not been to the county as many times as their non-mountain visiting counterparts (3.4 times in the past five years, compared to 4.4 times, on average).

	Mountain Visitors	All Others
Average age	46	46
Household income (average)	\$96,000	\$98,000
% married	71%	70%
% traveling with children	35%+	31%
Travel party size (average number of people)	3.6+	3.0
% traveling alone	12%	22%+
Number of visits to the county in last 5 years (average)	3.4	4.4+
% traveling for leisure or personal reasons	91%+	76%
% from Washington	48%+	43%

Trip Profile

Travelers who visit the mountains tend to spend more time in the county overall (4.3 nights vs. 2.9 nights, on average) but are *less* likely to be staying overnight (61% vs. 67%). This counterintuitive finding is a result of overnight travelers who visit the mountains staying much longer (7.1 nights) than overnight travelers who are not visiting the mountains (4.3 nights).

Mountain visitors spend more money on their trips, on average, than do those who do not go to the mountain (\$1,800 vs. about \$1,200 per-party per-trip).

	Mountain Visitors	All Others
Length of trip (average number of nights for all trips)	4.3+	2.9
% Staying overnight	61%	67%+
Length of <i>overnight</i> trips (average number of nights for overnight trips)	7.1	4.3
Travel party spending (average per-party, per-trip)	\$1,836+	\$1,235
Traveler spending (average per-person, per-day)	\$109	\$124+
% arriving by car	67%	63%

Attractions

Overall, mountain travelers visit roughly the same number of museums and other arts and cultural attractions as their counterparts, but, not surprisingly, do go to many more outdoor attractions.

	Mountain Visitors	All Others
Average # of museums visited (out of 10)	.9	.8
Average # of arts and cultural attractions visited (out of 5)	.2	.1
Average # of outdoor attractions (out of 17)	2.0+	.6

Activities

Overall, mountain visitors engage in more activities than do non-mountain visitors, whether seeing the county (1.8 activities out of 8, vs. 1.3 activities, on average), outdoor activities (2.2 out of 13, vs. .4 activities), or fun and recreation (1.7 out of 7, vs. 1.5).

	Mountain Visitors	All Others
Average # of activities related to seeing the county (out of 8)	1.8+	1.3
Average # of outdoor activities (out of 13)	2.2+	.4
Average # of entertainment and recreation activities (out of 8)	1.7+	1.5

Views Toward the County and Trip Satisfaction

Both mountain and non-mountain visitors are generally pleased with their trips to Pierce County. At the same time, mountain visitors have a slightly higher level of satisfaction with their trips than others (providing average ratings of 4.5 and 4.3, respectively, on a 5-point scale) and are slightly more likely to return to the county at some point in the future (85% of mountain visitors will return, vs. 81% of non-mountain visitors).

Satisfaction With Trip	Mountain Visitors	All Others
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.5+	4.3
Percent likely to return (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	85%+	81%

While majorities of both mountain and non-mountain visitors believe that most of 13 positive statements describe the county, mountain visitors are more likely to believe that the county is described by almost all of the positive attributes listed in the survey.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")	Mountain Visitors	All Others
Offers a beautiful, natural environment	91%+	78%
Offers reasonably priced lodging	67%	64%
Offers plenty to see and do	87%+	76%
Has a clean, unspoiled environment	79%+	64%
Offers affordable dining	73%	70%
Is easy to get to	76%	72%
Offers the arts and culture I want	69%+	64%
Is unlike any other destination	58%+	38%
Has establishments that provide excellent service	75%	70%
Makes it easy to find information about things to do in the county before you visit	78%+	65%
Makes it easy to find things to do once in the county	76%+	62%
Makes it easy to navigate and get around	71%+	55%
Offers a welcoming environment for visitors	85%+	73%

First-time and Repeat Visitors

Traveler Profile

Three out of ten surveyed visitors to Pierce County between October of 2015 and September of 2016 had never been to the county before (30%), leaving 70% of travelers in that timeframe who had visited previously.

In all, the typical repeat visitor has been to the county six times in the previous five years.

Demographically, those who have been to the county before are slightly older (with an average age of 47 compared to 45 among first-time visitors); have slightly higher incomes (\$99,000 vs. \$95,000); are more likely to be married (71% vs. 66%); and are more likely to bring children on their trip (35% vs. 25%).

First-time and repeat visitors have equal travel party sizes (3.1 people, on average, for each group), and are equally likely to be traveling for leisure or personal reasons (77% of first-time visitors and 81% of repeat visitors traveled to the county for these reasons).

	First-time Visitors	Repeat Visitors
Average age	45	47+
Household income (average)	\$95,000	\$99,000+
% married	66%	71%+
% traveling with children	25%	35%+
Travel party size (average number of people)	3.1	3.1
% traveling alone	20%	20%
Number of visits to the county in last 5 years (average)	1	5.8+
% traveling for leisure or personal reasons	77%	81%
% from Washington	16%	54%+

Trip Profile

First-time visitors are more likely than those who have been to the county before to stay overnight (72% vs. 63%) and, consequently, have longer stays overall (4.0 nights on average, vs. 2.9 nights).

Due in large part to their longer stays in the county, first-time visitors also spend more on their trips: more than \$1,800 vs. \$1,200, on average, per-party per-trip.

	First-time Visitors	Repeat Visitors
Length of trip (average number of nights)	4.0+	2.9
% Staying overnight	72%+	63%
Travel party spending (average per-party, per-trip)	\$1,836+	\$1,206
Traveler spending (average per-person, per-day)	\$121	\$118

Attractions

Overall, first-time and repeat visitors show broadly similar visitation to the county's museums, arts and cultural attractions, and outdoor attractions.

	First-time Visitors	Repeat Visitors
Average # of museums visited (out of 10)	.9+	.7
Average # of arts and cultural attractions visited (out of 5)	.1	.1
Average # of outdoor attractions (out of 17)	1.1+	1.0

Views Toward the County and Trip Satisfaction

Both first-time and repeat visitors are generally pleased with their trips to Pierce County (providing average ratings of 4.3 and 4.4, respectively, on a 5-point scale). Nearly nine out of ten repeat visitors, however, say they are likely to return at some point in the future (88%), compared to fewer than seven out of ten first-time visitors (67%).

Satisfaction With Trip	First-time Visitors	Repeat Visitors
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.3	4.4
Percent likely to return (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	67%	88%+

While majorities of both first-time and repeat visitors to Pierce County believe that almost all of 13 positive statements presented in the survey describe the county, interestingly, first-time visitors are more likely than repeat visitors to believe that the county is described by several of the listed positive attributes.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")	First-time Visitors	Repeat Visitors
Offers a beautiful, natural environment	84%+	80%
Offers reasonably priced lodging	67%	64%
Offers plenty to see and do	78%	79%
Has a clean, unspoiled environment	75%+	65%
Offers affordable dining	73%	70%
Is easy to get to	72%	74%
Offers the arts and culture I want	67%	64%
Is unlike any other destination	49%+	41%
Has establishments that provide excellent service	77%+	69%
Makes it easy to find information about things to do in the county before you visit	72%+	66%
Makes it easy to find things to do once in the county	70%+	64%
Makes it easy to navigate and get around	65%+	58%
Offers a welcoming environment for visitors	81%+	74%

Day and Overnight Visitors

Traveler Profile

Two out of three visitors to Pierce County between the fall of 2015 and the summer of 2016 stayed overnight (66%).

Although day visitors and overnight visitors tend to be about the same age (46 vs. 47 years old, on average), overnight visitors have higher household incomes (\$101,000 vs. \$92,000) and are more likely to be married (72% vs. 66%).

Day-trippers, on the other hand, are more likely than overnight visitors to travel with children (38% vs. 29%), to have been to the county before (with an average of 4.6 trips over the past five years, compared to 3.9 trips among overnight visitors), and to be traveling for leisure (96% vs. 71%).

	Day Visitors	Overnight Visitors
Average age	46	47
Household income (average)	\$92,000	\$101,000+
% married	66%	72%+
% traveling with children	38%+	29%
Travel party size (average number of people)	3.5+	2.9
% traveling alone	11%	24%+
Number of visits to the county in last 5 years (average)	4.6+	3.9
% traveling for leisure or personal reasons	96%+	71%
% from Washington	69%+	30%

Trip Profile

The typical overnight traveler spends nearly five nights in the county (4.9 nights in all, on average).

The average travel party visiting Pierce County for just a day spends just over \$150 in the area. Those who are staying overnight, however, spend an average of \$2,000.

	Day Visitors	Overnight Visitors
Length of trip (average number of nights)	0	4.9
Travel party spending (average per-party, per-trip)	\$159	\$2,000+
Traveler spending (average per-person, per-day)	\$49	\$126+

Attractions

Predictably, those who are in the county for more than a day are able to visit more attractions.

Although day and overnight travelers visit the same number of museums on average, overnight visitors go to more arts and cultural activities and outdoor attractions than those who do not stay overnight.

	Day Visitors	Overnight Visitors
Average # of museums visited (out of 10)	.8	.8
Average # of arts and cultural attractions visited (out of 5)	.1	.2+
Average # of outdoor attractions (out of 17)	.9	1.1+

Views Toward the County and Trip Satisfaction

Both day and overnight travelers are generally pleased with their trips to Pierce County, (providing average ratings of 4.4 and 4.3, respectively, on a 5-point scale), though day visitors are more likely to say they will return to the county at some point in the future (86% vs. 80%).

	Day Visitors	Overnight Visitors
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.4	4.3
Percent likely to return (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	86%+	80%

By and large, most day-trippers and overnight visitors believe Pierce County is described by each of the 13 positive statements provided in the questionnaire, though, interestingly, overnight visitors are more likely than day-trippers to believe the county is affordable.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")		
	Day Visitors	Overnight Visitors
Offers a beautiful, natural environment	84%+	80%
Offers reasonably priced lodging	59%	67%+
Offers plenty to see and do	82%+	77%
Has a clean, unspoiled environment	70%	67%
Offers affordable dining	65%	73%+
Is easy to get to	76%	72%
Offers the arts and culture I want	66%	64%
Is unlike any other destination	49%+	41%
Has establishments that provide excellent service	69%	72%
Makes it easy to find information about things to do in the county before you visit	68%	68%
Makes it easy to find things to do once in the county	65%	66%
Makes it easy to navigate and get around	63%+	58%
Offers a welcoming environment for visitors	76%	76%

Overnight Visitors Staying in Paid Accommodations and Those Staying in Unpaid Accommodations

Traveler Profile

Among the 66% of visitors who are staying overnight in Pierce County, eight out of ten stay in paid accommodations (81%).

Overnight visitors who are staying in paid lodging are similar to those who are staying in unpaid lodging in terms of age (47 vs. 46 years of age, respectively), travel party size (2.9 vs. 3.1 people, on average) and number of previous visits to the county in the past five years (4.0 and 3.9, respectively).

At the same time, compared to their counterparts, those who are paying for overnight accommodations in the county have higher household incomes (\$104,000 vs. \$86,000) and are more likely to be married (75% vs. 61%), but are less likely to come to the county for leisure or personal purposes (65% vs. 97%).

	Paid Accommodations	Unpaid Accommodations
Average age	47	46
Household income (average)	\$104,000+	\$86,000
% married	75%+	61%
% traveling with children	26%	40%+
Travel party size (average number of people)	2.9	3.1
% traveling alone	25%+	19%
Number of visits to the county in last 5 years (average)	4.0	3.9
% traveling for leisure or personal reasons	65%	97%+
% from Washington	31%	28%

Trip Profile

Overnight travelers who are not paying for their lodging in the county stay an average of about six nights in all – significantly longer than those in paid accommodations (who stay less than five nights on average).

Perhaps because they spend more time in the county on their trips, overnight visitors who are *not* paying for their lodging spend almost as much in the county, overall, as do those who are paying for their lodging (each type of overnight travel party spends about \$2,000 over the course of their trip).

	Paid Accommodations	Unpaid Accommodations
Length of trip (average number of nights)	4.5	6.4+
% Staying overnight	100%	100%
Travel party spending (average per-party, per-trip)	\$1,988	\$2,063
Traveler spending (average per-person, per-day)	\$135+	\$96

As mentioned above, those who stay in unpaid accommodations have longer stays in the county, so although they do not have expenses for lodging, overnight visitors who do not pay for lodging spend more on food, recreation, shopping, gasoline, and other expenses, leading to an equivalent amount of trip spending overall.

Average Spending Per Travel Party Per Trip	Paid Accommodations	Unpaid Accommodations
Lodging & Accommodations	\$635	\$0
Food & Beverages	\$493	\$688+
Recreation or Entertainment	\$203	\$500+
Shopping	\$245	\$477+
Gasoline	\$148	\$237+
Car Rental	\$227+	\$94
All other	\$37	\$67+
TOTAL	\$1,988	\$2,063+

Attractions

Overnight visitors who are staying in unpaid accommodations tend to visit more attractions than their counterparts who are paying for accommodations. This includes museums, arts and cultural attractions, and outdoor attractions.

	Paid Accommodations	Unpaid Accommodations
Average # of museums visited (out of 10)	.7	1.1+
Average # of arts and cultural attractions visited (out of 5)	.1	.2
Average # of outdoor attractions (out of 17)	1.0	1.4+

Views Toward the County and Trip Satisfaction

Among overnight visitors to Pierce County, those staying in unpaid accommodations are more likely than those staying in paid accommodations to be pleased with their trips. Specifically, those not paying for lodging have slightly higher satisfaction ratings with their trips overall (providing average ratings of 4.5 on a 5-point scale, compared to 4.3 among those in paid lodging), and are more apt to say they are likely to return (87% vs. 78%).

	Paid Accommodations	Unpaid Accommodations
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.3	4.5+
Percent likely to return (% rating 4 or 5 on scale of 1: "Definitely will not" to 5: "Definitely will")	78%	87%+

Although majorities of overnight visitors to Pierce County – regardless of their accommodations – believe that almost all of 13 positive statements presented in the survey describe the county, those staying in unpaid accommodations are more likely than those staying in paid accommodations to believe the county is described by many of the listed positive attributes.

Descriptiveness of Positive Statements About the County (%) <small>rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well"</small>	Paid Accommodations	Unpaid Accommodations
Offers a beautiful, natural environment	78%	90%+
Offers reasonably priced lodging	68%	62%
Offers plenty to see and do	75%	86%+
Has a clean, unspoiled environment	64%	78%+
Offers affordable dining	72%	77%
Is easy to get to	71%	78%+
Offers the arts and culture I want	61%	80%+
Is unlike any other destination	39%	52%+
Has establishments that provide excellent service	71%	77%
Makes it easy to find information about things to do in the county before you visit	66%	77%+
Makes it easy to find things to do once in the county	64%	77%+
Makes it easy to navigate and get around	56%	66%+
Offers a welcoming environment for visitors	74%	86%+

Seasonal Comparisons

Definitions of Seasons

The definitions of the seasons profiled in this appendix are shown in the table below.

Fall	Winter	Spring	Summer
October 2015	December 2015	March 2016	June 2016
November 2015	January 2016	April 2016	July 2016
	February 2016	May 2016	August 2016
			September 2016

Traveler Profile

Overall, the average age of visitors to Pierce County does not differ dramatically across the seasons, though visitors in the winter do tend to be slightly younger than visitors in other seasons.

Visitors in the fall are less likely than visitors in other seasons to be married and, perhaps as a result, have the lowest household incomes, on average.

Travel parties tend to consist of about three people in each season – with no difference in the share of travelers who are traveling with children – although spring and summer bring slightly larger parties to the county, on average than do fall and winter.

Finally, travelers surveyed in the winter are much less likely to be traveling for leisure or personal purposes; the larger number of business travelers in this season likely contributes to the fact that winter visitors are the most likely to be traveling alone.

	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Average age	46	45	48 B	47 B
Household income (average)	\$89,000	\$101,000 AD	\$99,000 A	\$95,100
% married	58%	69% A	72% A	71% A
% traveling with children	35%	32%	31%	31%
Travel party size (average number of people)	2.9	2.9	3.2 B	3.3 AB
% traveling alone	15%	28% ACD	15%	15%
Number of visits to the county in last 5 years (average)	4.0	4.8 CD	3.9	3.7
% traveling for leisure or personal reasons	95% BCD	69%	86% B	85% B
% from Washington	55% BCD	44%	42%	44%

The letters shown next to numbers above indicate that the accompanying figure is significantly greater than the counterpart figure shown in the column marked by the letter.

Trip Profile

Summer visits to the county are significantly longer than visits in any other season, with fall visits being the shortest overall.

Overall, autumn travelers tend to spend less than do those in other seasons, with travelers in the spring and summer spending the most overall.

	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Length of trip (average number of nights)	2.0	2.9 A	2.7	3.9 ABC
% Staying overnight	49%	69% AD	68% A	64% A
Travel party spending (average per-party, per-trip)	\$872	\$1,154 A	\$1,761 AB	\$1,836 AB
Traveler spending (average per-person, per-day)	\$97	\$129 AD	\$120 A	\$113 A

Views Toward the County and Trip Satisfaction

In general, travelers’ satisfaction with their trips and their likelihood to return to the county in the future are consistent across seasons.

	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Average satisfaction rating (scale of 1: “Very dissatisfied” to 5: “Very satisfied”)	4.4	4.3	4.3	4.4 B
Percent likely to return (% rating 4 or 5 on scale of 1: “Definitely will not” to 5: “Definitely will”)	86%	81%	82%	81%

While many travelers to Pierce County believe that each of 13 positive statements describe the county – regardless of the season of their trip – travelers in the winter are less likely than those in other seasons to believe that several of these positive attributes describe the county.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")	Fall	Winter	Spring	Summer
	(A)	(B)	(C)	(D)
Offers a beautiful, natural environment	85% B	77%	83% B	85% B
Offers reasonably priced lodging	67%	65%	64%	65%
Offers plenty to see and do	77%	76%	81%	81% B
Has a clean, unspoiled environment	62%	61%	71% B	74% AB
Offers affordable dining	70%	71%	71%	71%
Is easy to get to	78%	73%	72%	74%
Offers the arts and culture I want	70%	62%	69% B	65%
Is unlike any other destination	48% B	35%	43% B	52% BC
Has establishments that provide excellent service	68%	70%	73%	73%
Makes it easy to find information about things to do in the county before you visit	62%	65%	70%	71% B
Makes it easy to find things to do once in the county	67%	61%	66%	71% B
Makes it easy to navigate and get around	62%	54%	60%	65% B
Offers a welcoming environment for visitors	73%	72%	78% B	80% B

Easterners and Westerners

Traveler Profile

Approximately one out of five visitors to Pierce County over the course of the survey period came from the eastern portion of the contiguous United States (22%, as defined below), with the remaining 78% coming from the western portion (also as defined below).

East	West
Alabama	Arizona
Arkansas	California
Connecticut	Colorado
Delaware	Idaho
Florida	Kansas
Georgia	Montana
Illinois	Nebraska
Indiana	Nevada
Iowa	New Mexico
Kentucky	North Dakota
Louisiana	Oklahoma
Maine	Oregon
Maryland	South Dakota
Massachusetts	Texas
Michigan	Utah
Minnesota	Washington
Mississippi	Wyoming
Missouri	
New Hampshire	
New Jersey	
New York	
North Carolina	
Ohio	
Pennsylvania	
Rhode Island	
South Carolina	
Tennessee	
Vermont	
Virginia	
Washington, DC	
West Virginia	
Wisconsin	

Generally, visitors from the eastern portion of the country are similar to those from the western portion, though visitors from the east tend to be slightly older than those from the west (49 vs. 46 years old, on average), and tend to have slightly higher household incomes (\$102,000 vs. \$97,000).

	Easterners	Westerners
Average age	49+	46
Household income (average)	\$102,000+	\$97,000
% married	74%	70%
% traveling with children	19%	36%+
Travel party size (average number of people)	3.0	3.2
% traveling alone	23%	19%
Number of visits to the county in last 5 years (average)	2.5	5.1+
% traveling for leisure or personal reasons	49%	52%
% from Washington	0	58%

Trip Profile

Perhaps predictably, those who traveled longer distances to visit Pierce County spend more time there (5.5 nights in all, on average, vs. 2.3 among those from the west).

While the average daily spending per person does not vary with region, those from the eastern portion of the contiguous United States spend more than those from the western portion over the course of their stay in Pierce County. (This would be expected, given their longer stays in the county.)

	Easterners	Westerners
Length of trip (average number of nights)	5.5+	2.3
Travel party spending (average per-party, per-trip)	\$2,782+	\$968
Traveler spending (average per-person, per-day)	\$126	\$113

Attractions

Although easterners and westerners visit the same number of Pierce County’s museums overall, westerners visit more of the county’s arts and cultural attractions while easterners visit more outdoor attractions.

	Easterners	Westerners
Average # of museums visited (out of 10)	.84	.75
Average # of arts and cultural attractions visited (out of 5)	.08	.14+
Average # of outdoor attractions (out of 17)	1.25+	.95

Views Toward the County and Trip Satisfaction

Visitors from the east and west are equally satisfied with their trips to Pierce County (each providing average ratings of 4.4 on a 5-point satisfaction scale), though, perhaps predictably, those who live closer to Pierce County (85%) are more likely than those who live farther away (75%) to say they will return.

	Easterners	Westerners
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.4	4.4
Percent likely to return (% rating 4 or 5 on scale of 1: "Definitely will not" to 5: "Definitely will")	75%	85%+

Finally, by and large most visitors – regardless of where they live – believe Pierce County is described by each of 13 positive statements provided in the questionnaire. Those from the east, however, are slightly more likely than their western counterparts to agree with several of the listed statements.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")		
	Easterners	Westerners
Offers a beautiful, natural environment	85%+	81%
Offers reasonably priced lodging	69%	65%
Offers plenty to see and do	83%	79%
Has a clean, unspoiled environment	76%+	66%
Offers affordable dining	77%+	70%
Is easy to get to	73%	75%
Offers the arts and culture I want	69%	64%
Is unlike any other destination	52%+	42%
Has establishments that provide excellent service	76%+	70%
Makes it easy to find information about things to do in the county before you visit	72%	68%
Makes it easy to find things to do once in the county	70%	65%
Makes it easy to navigate and get around	62%	59%
Offers a welcoming environment for visitors	79%	76%

Drivers and Flyers

Traveler Profile

Two out of three visitors to Pierce County between the fall of 2015 and the summer of 2016 came to the area by car (64%). Nearly all of the rest, (33% of all travelers) arrived by plane.

Demographically, drivers are similar to flyers in age (46 vs. 47 years old, on average) and marital status (71% of each type of visitor). At the same time, flyers are less likely than drivers to be traveling with others (70% vs. 85%), to be traveling for leisure (39% vs. 57%), and to be from Washington (3% vs. 65%).

Flyers also have higher household incomes than drivers (\$104,000 on average vs. \$96,000) and have made fewer recent visits to the county (2.9 vs. 5.0 visits in the last five years).

	Drivers	Flyers
Average age	46	47
Household income (average)	\$96,000	\$104,000+
% married	71%	71%
% traveling with children	39%+	19%
Travel party size (average number of people)	3.2+	2.9
% traveling alone	15%	30%+
Number of visits to the county in last 5 years (average)	5.0+	2.9
% traveling for leisure or personal reasons	57%+	39%
% from Washington	65%+	3%

Trip Profile

The typical flyer spends more than twice as much time in the county as the typical driver (5.4 nights vs. 2.1 nights, on average) and, largely as a result, spends much more money in the county (roughly \$2,500 vs. \$800 for drivers in all).

	Drivers	Flyers
Length of trip (average number of nights)	2.1	5.4+
Travel party spending (average per-party, per-trip)	\$824	\$2,531+
Traveler spending (average per-person, per-day)	\$104	\$130

Attractions

Flyers and drivers tend to visit the same number of arts and cultural and outdoor attractions in the county. Flyers, however, visit more museums on average than do drivers.

	Drivers	Flyers
Average # of museums visited (out of 10)	.75	.87+
Average # of arts and cultural attractions visited (out of 5)	.14	.12
Average # of outdoor attractions (out of 17)	1.00	1.07

Views Toward the County and Trip Satisfaction

Both flyers and drivers are pleased with their trips to Pierce County (each providing average ratings of 4.4 on a 5-point scale). Perhaps predictably, however, those who drive to the county are more apt than those who fly to say they are likely to return (85% vs. 76%).

	Drivers	Flyers
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.4	4.4
Percent likely to return (% rating 4 or 5 on scale of 1: "Definitely will not" to 5: "Definitely will")	85%+	76%

Most flyers and drivers believe Pierce County is described by almost all of the 13 positive statements listed in the questionnaire. At the same time, flyers are more likely than drivers to believe many of the positive statements describe the county.

Descriptiveness of Positive Statements About the County (% rating 4 or 5 on a scale of 1: "Statement does not describe the county at all" to 5: "Statement describes the county extremely well")		
	Drivers	Flyers
Offers a beautiful, natural environment	80%	84%+
Offers reasonably priced lodging	62%	71%+
Offers plenty to see and do	78%	81%
Has a clean, unspoiled environment	66%	72%+
Offers affordable dining	68%	77%+
Is easy to get to	74%	73%
Offers the arts and culture I want	63%	69%+
Is unlike any other destination	44%	45%
Has establishments that provide excellent service	69%	75%+
Makes it easy to find information about things to do in the county before you visit	67%	71%
Makes it easy to find things to do once in the county	64%	70%+
Makes it easy to navigate and get around	59%	62%
Offers a welcoming environment for visitors	74%	81%+