



Pierce County, Washington

Supplemental Profiles of Visitors to Pierce County

Prepared for:

TRAVEL TACOMA + PIERCE COUNTY

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March 2018

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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; those profiles are the focus of this report.

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.)

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.

Detailed Profiles of Traveler Subgroups

This document, created for Travel Tacoma + Pierce County, 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:

- Washington residents (1,003) and residents of other states (n=1,274);
- Mountain visitors (n=644) and non-mountain visitors (n=1,985);
- Day (n=898) and overnight (n=1,707) visitors;
- 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);
- Drivers (n=1,646) and fliers (n=848).

Differences between the traveler subgroups that rise to the level of statistical significance – and are therefore likely to reflect true differences in the population – are shown by a “+” or, for the seasonal comparisons, a letter next to the subgroup percentage that is larger.

Throughout this report, the tables showing specific activities and views toward the county have the highest rated items for each subgroup bolded.

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).

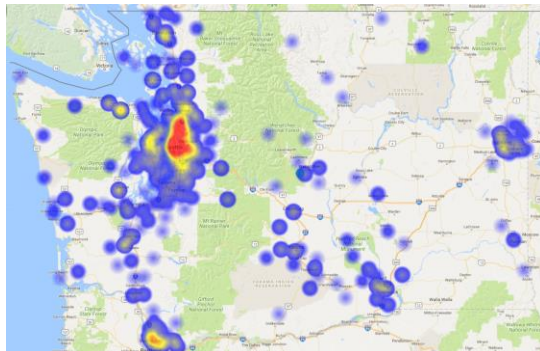
Seven out of ten visitors, whether from Washington (69%) or other areas (72%) are married.

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).

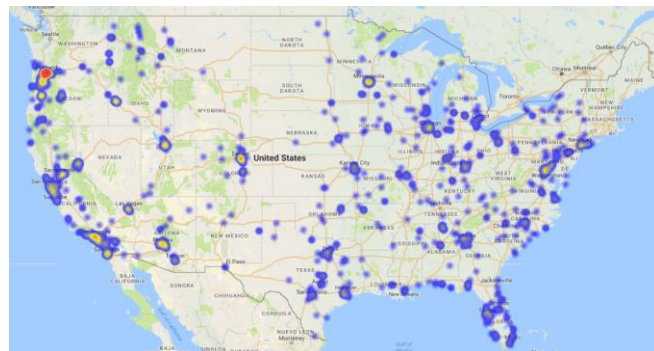
Visitors from Washington are also more likely to be visiting for leisure purposes (90%) than are those who do not live in the state (71%).

Traveler Characteristics	Washington Residents	All Others
Average age (years)	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 vacation	90%+	71%

Origin of Washington Residents



Origin of Other Americans



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.

Trip Characteristics	Washington Residents	All Others
% staying overnight	44%	81%+
Length of trip (average number of nights)	1.4	4.3+

Fewer than four out of ten residents of Washington stay in overnight lodging while in the county (37%), compared to nearly seven out of ten non-residents (66%).

Hotels and B&Bs are, by far, the most common type of lodging for all visitors, and those who live outside of Washington are twice as likely as those who live in the state to stay in this type of lodging (59% vs. 29%).

Lodging		Washington Residents	All Others
Percent staying in lodging		37%	66%+
<i>Top Lodging</i>	Hotel/B&B (off JBLM)	29%	59%+
	Home of friend or family member (unpaid)	6%	14%+
	RV park/campground/cabin	4%+	2%
	Vacation home/timeshare	2%	2%
	Hotel/B&B (on JBLM)	1%	3%+

On average, state residents plan their trips and make lodging reservations about five weeks in advance. Non-residents have longer planning windows – they begin planning their trips 8 weeks in advance of leaving, on average, and make lodging reservations 6 weeks before their trip.

Trip Planning	Washington Residents	All Others
Average trip planning window (planned before leaving home)	4.5 weeks	8 weeks+
Lodging reservation window (booked accommodations before leaving home)	5.2 weeks	6.2 weeks+

Visitors from outside of Washington use more resources generally, and more websites specifically, to plan their trips.

Resources		Washington Residents	All Others
Average # of resources used (out of 11)		1.7	1.9+
Top Re-sources	General internet searches	54%	54%
	Destination websites	40%+	35%
	Friends/family/coworkers	32%	41%+
Average # of websites used (out of 15)		1.1	1.5%+
Top Websites	Online search engines	27%	33%+
	Hotel websites	16%	32%+
	Facebook	19%+	12%
	TripAdvisor	7%	17%+
	AAA	4%	8%+

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).

Spending in the County	Washington Residents	All Others
Travel party spending (average per-party, per-trip)	\$621	\$1,888+
Traveler spending (average per-person, per-day)	\$91	\$127+

Attractions and Activities

Just over half of all visitors go to outdoor attractions during their trip to the county, and these attractions are equally popular among visitors who live in Washington (57%) and their non-resident counterparts (53%). About half also go to museums while in the county, although those from outside Washington are more likely to go to these attractions (55% vs. 48%). Only about one out of ten go to other arts and cultural attractions, though these are slightly more common among Washingtonians (9%) than others (13%).

Attractions	Washington Residents	All Others
Percent visiting outdoor attractions	57%	53%
Average # of outdoor attractions (out of 17)	.9	1.1
Percent visiting museums	48%	55%+
Average # of museums visited (out of 10)	.7	.8+
Percent visiting arts & cultural attractions	13%+	9%
Average # of arts and cultural attractions visited (out of 5)	.2+	.1

Roughly three out of four visitors overall engage in some form of sightseeing activity, though these activities are slightly more popular among visitors from outside of Washington (78%, 1.5 activities on average) than from Washington (74%, 1.2 activities on average).

Six out of ten Washingtonians take part in entertainment and recreation activities (61%, 1.2 activities on average), which is much lower than among their out-of-state counterparts (81%, 1.8 activities).

More than four out of ten visitors engage in outdoor activities (44% among Washington residents, 45% among other visitors), and each type of visitor engages in about one of these activities overall, on average (1.0 and .8 out of 13).

Activity Types	Washington Residents	All Others
Percent seeing the county	74%	78%+
Average # of activities related to seeing the county (out of 8)	1.2	1.5+
Percent engaging in entertainment and recreation activities	60%	81%+
Average # of entertainment and recreation activities (out of 8)	1.2	1.8+
Percent engaging in outdoor activities	44%	45%
Average # of outdoor activities (out of 13)	1.0	.8

Across all travelers, dining out is the most common activity in the county. Spending time with family and friends and visiting museums are also popular activities.

Those who come to the county from outside of Washington are more likely than Washington residents to engage in a number of activities listed on the survey. The most notable exception is festivals and special events, which are a draw for more visitors from Washington (23%) than out of state (15%).

Activities	Washington Residents	All Others
<i>Top Activities</i> Dining out	33%	52%+
Spending time with family/friends	24%	36%+
Visiting museums	25%	30%+
Relaxing	17%	28%+
Arts/culture	18%	23%+
Shopping	17%	23%+
Festivals/special events	23%+	15%
Visiting historical sites	12%	17%+
Mt. Rainier	16%	14%

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).

Roughly three out of four visitors would recommend a trip to the county to others; this holds true for residents of Washington (77%) and their counterparts from outside the state (74%).

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 recommend to others (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	77%	74%
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%
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%

Descriptiveness of Positive Statements	Washington	All Others
About the County (% selecting: "Statement describes the county extremely well")	Residents	All Others
Offers a beautiful, natural environment	44%	47%
Offers reasonably priced lodging	24%	28%
Offers plenty to see and do	39%	42%
Has a clean, unspoiled environment	29%	33%
Offers affordable dining	27%	28%
Is easy to get to	38%	34%
Offers the arts and culture I want	29%	28%
Is unlike any other destination	20%	19%
Has establishments that provide excellent service	29%	30%
Makes it easy to find information about things to do in the county before you visit	28%	29%
Makes it easy to find things to do once in the county	27%	29%
Makes it easy to navigate and get around	25%	24%
Offers a welcoming environment for visitors	35%	38%

Mountain Visitors and Non-mountain Visitors

Detailed Trip Purposes

One out of four surveyed 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

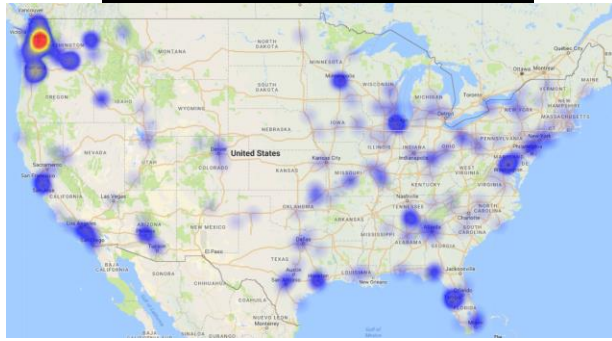
Generally speaking, travelers who visit the mountains are demographically very similar to those who do not visit the mountains in terms of age (mountain visitors and non-visitors are each 46 years old, on average), household income (\$96,000 for mountain visitors vs. \$98,000 for non-mountain visitors),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

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.

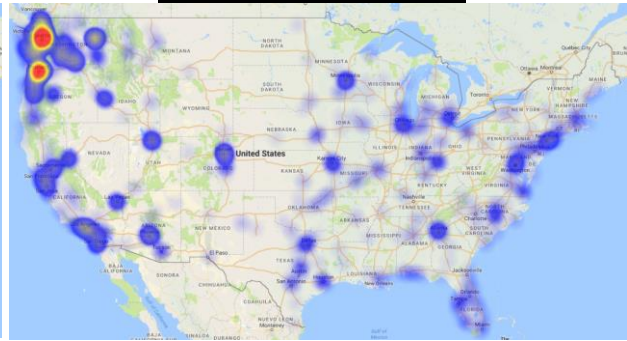
Mountain visitors are also slightly more likely to travel with children (35% vs. 31%) and tend to have larger travel parties (3.6 people vs. 3.0 people, on average). At the same time, mountain visitors have not been to the county as many times as their non-mountain visiting counterparts (3.4 times in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

Traveler Characteristics	Mountain Visitors	All Others
Average age (years)	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 vacation	91%+	76%
% from Washington	48%+	43%

Origin of Mountain Visitors



Origin of All Others



Trip Profile

Travelers who spend time at 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 mountains (\$1,800 vs. about \$1,200 per-party per-trip).

Trip Characteristics	Mountain Visitors	All Others
Length of trip (average number of nights for all trips)	4.3+	2.9
% stating 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%

Six out of ten mountain visitors stay in overnight accommodations while in the county (61%), compared to nearly seven out of ten who are not visiting the mountain (67%).

Hotels and B&Bs are the most common type of lodging for all visitors. Travelers visiting the mountains are less likely than others to stay in a hotel or B&B (34% vs. 51%), but are more likely to stay in an RV park or campground (7% vs. 1%) or a vacation home or timeshare (5% vs. 1%).

Lodging		Mountain Visitors	All Others
Percent staying in lodging		61%	67%+
<i>Top Lodging</i>	Hotel/B&B (off JBLM)	34%	51%+
	Home of friend or family member (unpaid)	12%	11%
	RV park/campground/cabin	7%+	1%
	Vacation home/timeshare	5%+	1%

On average, mountain visitors plan their trips and make lodging reservations about a week in advance. This is slightly earlier than their counterparts who do not go to the mountain, who begin planning their trips about six days in advance and book their reservations about five days in advance, on average.

Trip Planning		Mountain Visitors	All Others
Average trip planning window (planned before leaving home)		7.5+	6.4
Lodging reservation window (booked accommodations before leaving home)		7.3+	5.5

Visitors to the mountains use more resources overall than do travelers who do not visit the mountain, including a number of specific websites. At the same time, given that mountain visitors are less likely than their counterparts to stay in a hotel, it is not surprising that they are less likely than other visitors to rely on hotel websites.

Resources		Mountain Visitors	All Others
Average # of resources used (out of 11)		2.2+	1.7
<i>Top Re-sources</i>	General internet searches	63%+	53%
	Destination websites	44%+	35%
	Friends/family/coworkers	41%	37%
Average # of websites used (out of 15)		1.6+	1.2
<i>Top Websites</i>	Online search engines	36%+	28%
	Hotel websites	19%	27%+
	Facebook	19%+	15%
	TripAdvisor	20%+	13%
	VisitRainier.com	13%+	1%

Attractions and Activities

Overall, museums and other arts and cultural attractions are equally popular among mountain visitors and their counterparts. About half of all travelers go to museums (53% each, visiting about one, on average) and one out of ten go to arts and cultural attractions (11% each).

At the same time, as may be predicted, mountain visitors are much more likely to go to outdoor attractions (89% vs. 42%) and go to more of these attractions than do non-mountain visitors (2 vs. .6, on average).

Attractions	Mountain Visitors	All Others
Percent visiting outdoor attractions	89%+	42%
Average # of outdoor attractions (out of 17)	2.0+	.6
Percent visiting museums	53%	53%
Average # of museums visited (out of 10)	.9	.8
Percent visiting arts & cultural attractions	11%	11%
Average # of arts and cultural attractions visited (out of 5)	.2	.1

Almost nine out of ten mountain visitors engage in some form of sightseeing activity (86%) and these visitors engage in nearly two of these activities over the course of their stay (1.8, on average, out of 8). Fewer non-mountain visitors, though still three out of four, engage in a sightseeing activity (75%, 1.3 activities on average).

Mountain activities appear to drive outdoor recreation in the county. Nearly nine out of ten mountain visitors take part in outdoor activities (87%, 2.2 activities on average), compared to fewer than three out of ten who do not visit the mountain (27%, .4 activities).

Seven out of ten visitors overall engage in entertainment and recreation activities (72% among both mountain visitors and non-mountain visitors), and each type of visitor engages in almost two of these types of activities overall, on average (1.7, 1.5).

Activity Types	Mountain Visitors	All Others
Percent seeing the county	86%+	75%
Average # of activities related to seeing the county (out of 8)	1.8+	1.3
Percent engaging in outdoor activities	87%+	27%
Average # of outdoor activities (out of 13)	2.2+	.4
Percent engaging in entertainment and recreation activities	72%	72%
Average # of entertainment and recreation activities (out of 8)	1.7+	1.5

Visiting Mt. Rainier is the most common activity for mountain visitors (54%), followed by trail hiking (37%). Many of these visitors say they climbed the mountain during their trip to the county (27%).

Many of the most popular activities for visitors to the county generally are equally popular for those who visit the mountain and those who do not.

More than four out of ten mountain visitors (42%) and non-visitors (45%) dine out while in the county, and closer to three out of ten spend time with family or friends (mountain visitors: 33%; non-mountain visitors: 29%) or visit museums (26%, 29%).

Relaxing is more common among mountain visitors (32%, vs. 21%), as are visiting historical sites (27%, 11%), and photography (20%, 9%).

Activities		Mountain Visitors	All Others
Top Activities	Mt. Rainier	54%	--
	Climbing Mt. Rainier	27%	--
	Dining out	42%	45%
	Spending time with family/friends	33%	29%
	Relaxing	32%+	21%
	Visiting historical sites	27%+	11%
	Visiting museums	26%	29%
	Arts/culture	19%	21%
	Shopping	22%	21%
	Trail hiking	37%+	8%
	Photography	20%+	9%

Views Toward the County and Trip Satisfaction

Both mountain and non-mountain visitors are generally pleased with their trips to Pierce County, though mountain visitors have a slightly higher level of satisfaction with their trips than others. Compared to those who do not visit the mountain, mountain visitors:

- Provide average ratings of 4.5 (on a 5-point scale), compared to 4.3 for others;
- Are much more likely to recommend the county to others (86% vs. 72%), and
- Are slightly more likely to return to the county at some point in the future (85%, vs. 81%).

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 recommend to others (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	86%+	72%
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 generally described or – described *extremely well* – 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%

Descriptiveness of Positive Statements		
About the County (% selecting: "Statement describes the county <i>extremely well</i> ")	Mountain Visitors	All Others
Offers a beautiful, natural environment	63%+	38%
Offers reasonably priced lodging	31%+	24%
Offers plenty to see and do	53%+	35%
Has a clean, unspoiled environment	45%+	26%
Offers affordable dining	30%	26%
Is easy to get to	40%+	33%
Offers the arts and culture I want	28%	28%
Is unlike any other destination	30%+	15%
Has establishments that provide excellent service	34%+	27%
Makes it easy to find information about things to do in the county before you visit	35%+	26%
Makes it easy to find things to do once in the county	36%+	25%
Makes it easy to navigate and get around	32%+	21%
Offers a welcoming environment for visitors	47%+	33%

Day and Overnight Visitors

Traveler Profile

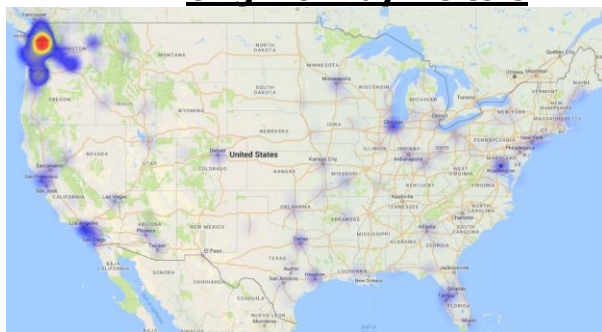
Two out of three surveyed visitors to Pierce County between the fall of 2015 and the summer of 2016 stayed overnight (66%).

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, on average) and are more likely to be married (72% vs. 66%).

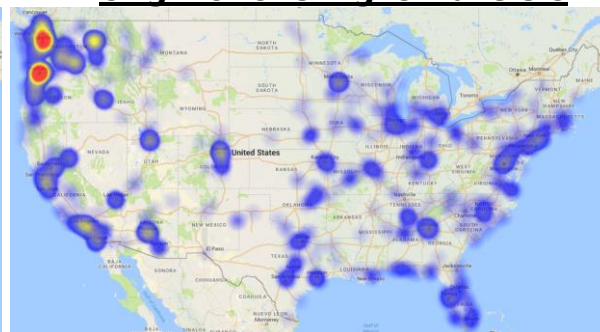
Day-trippers, on the other hand, are more likely than overnight visitors to travel with children (38% vs. 29%), to have been to the county before (with an average of 4.6 trips over the past five years, compared to 3.9 trips among overnight visitors), and to be traveling for leisure (96% vs. 71%).

Traveler Characteristics	Day Visitors	Overnight Visitors
Average age (years)	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 vacation	96%+	71%
% from Washington	69%+	30%

Origin of Day Visitors



Origin of Overnight Travelers



Trip Profile

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

The average group 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.

Trip Characteristics	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+

Hotels and B&Bs outside JBLM are, by far, the most common type of lodging for overnight visitors – seven out of ten stay in this type of accommodation (71%). Most of the rest, amounting to 17% overall, stay in a friend’s or family member’s home, with handfuls staying in outdoor lodging (4%), a vacation home or timeshare (3%), or a hotel on JBLM (3%).

Lodging		Day Visitors	Overnight Visitors
Percent staying in lodging		--	100%
<i>Top Lodging</i>	Hotel/B&B (off JBLM)	--	71%
	Home of friend or family member (unpaid)	--	17%
	RV park/campground/cabin	--	4%
	Vacation home/timeshare	--	3%
	Hotel/B&B (on JBLM)	--	3%

Overnight visitors plan their trips almost eight weeks in advance, and book their lodging nearly six weeks in advance. Day visitors, by contrast, begin planning their trips less than five weeks in advance.

Trip Planning	Day Visitors	Overnight Visitors
Average trip planning window (planned before leaving home)	4.7 weeks	7.7 weeks +
Lodging reservation window (booked accommodations before leaving home)	6.5 weeks (staying overnight outside the county)	5.8 weeks

Overnight visitors are more likely than day visitors to use general internet searches to plan their trip to the county (57% vs. 52%), while day visitors are more likely to use destination websites (42%, 34%).

Overnight visitors use more websites to plan their trips, though this appears to be largely driven by the need to book or find information about their hotels.

Resources		Day Visitors	Overnight Visitors
Average # of resources used (out of 11)		1.8	1.8
Top Resources	General internet searches	52%	57%+
	Destination websites	42%+	34%
	Friends/family/coworkers	38%	38%
Average # of websites used (out of 15)		1.1	1.4+
Top Websites	Online search engines	29%	31%
	Hotel websites	9%	34%+
	Facebook	16%	15%
	TripAdvisor	10%	17%+
	Booking websites	6%	16%+

Attractions and Activities

Day travelers are *more likely* than their overnight counterparts to visit museums (59% vs. 50%), though day and overnight travelers visit the same *number* of museums, on average, overall (.8 out of 10 museums listed in the survey, on average, for each).

Day (54%) and overnight (56%) visitors are equally *likely* to visit outdoor attractions, though overnight visitors typically visit *more* outdoor attractions than do their day-trip counterparts (1.1 vs. .9, out of 17).

Finally, compared to day-trippers, overnight visitors are both *more likely* to go to arts or cultural attractions (13% vs. 9%) and *visit more* of these attractions while in the county (.2 vs. .1 out of five, on average).

Attractions	Day Visitors	Overnight Visitors
Percent visiting museums	59%+	50%
Average # of museums visited (out of 10)	.8	.8
Percent visiting outdoor attractions	54%	56%
Average # of outdoor attractions (out of 17)	.9	1.1+
Percent visiting arts & cultural attractions	9%	13%+
Average # of arts and cultural attractions visited (out of 5)	.1	.2+

Eight out of ten day visitors engage in some form of sightseeing activity (82%) and these visitors engage in more than one of these activities over the course of their stay (1.4, on average, out of 8). Fewer overnight visitors, though still three out of four, engage in a sightseeing activity (75%, 1.4 activities on average).

Just over half of day visitors take part in entertainment and recreation activities (55%, engaging in 1.1 of these activities on average), compared to eight out of ten overnight visitors (82%, 1.5 of these activities on average).

Almost half of day visitors take part in outdoor activities (47%, 1 activity on average), compared to four out of ten overnight visitors (41%, .9 activities).

Activity Types	Day Visitors	Overnight Visitors
Percent seeing the county	82%+	75%
Average # of activities related to seeing the county (out of 8)	1.4	1.4
Percent engaging in entertainment and recreation activities	55%	82%+
Average # of entertainment and recreation activities (out of 8)	1.1	1.8+
Percent engaging in outdoor activities	47%+	41%
Average # of outdoor activities (out of 13)	1.0	.9

Not surprisingly, those who stay in the county for more than a day are more likely to take part in the most popular activities available in the county. Overnight travelers are more likely than day-trippers to dine out (52% vs. 29%), spend time with friends and family (34% vs. 24%), relax (27% vs. 17%), shop (25% vs. 14%), or enjoy nightlife (16%, 7%).

At the same time, day-trippers are slightly more likely than overnight travelers to visit museums (31% vs. 26%) or arts and cultural activities (24% vs. 19%), or visit the mountain (16%, 13%).

Festivals or special events (21% day-trippers, 18% overnight visitors) and visiting historical sites (14%, 15%) are equally popular among day and overnight visitors to the county.

Activities		Day Visitors	Overnight Visitors
Top Activities	Dining out	29%	52%+
	Spending time with family/friends	24%	34%+
	Visiting museums	31%+	26%
	Relaxing	17%	27%+
	Shopping	14%	25%+
	Arts/culture	24%+	19%
	Festivals/special events	21%	18%
	Visiting historical sites	14%	15%
	Mt. Rainier	16%+	13%
	Bars/Nightlife	7%	16%+

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 satisfaction scale).

At the same time, day visitors are more likely to say they will return to the county at some point in the future (86% vs. 80%) or to recommend a visit to the county to others (82% vs. 73%).

Satisfaction	Day Visitors	Overnight Visitors
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.4	4.3
Percent likely to recommend to others (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	82%+	73%
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.

Day-trippers are particularly likely to say the county is described *extremely well* by nearly of these positive 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")		
	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%

Descriptiveness of Positive Statements		
About the County (% selecting: "Statement describes the county <i>extremely well</i> ")		
	Day Visitors	Overnight Visitors
Offers a beautiful, natural environment	51%+	42%
Offers reasonably priced lodging	28%	25%
Offers plenty to see and do	43%+	38%
Has a clean, unspoiled environment	36%+	29%
Offers affordable dining	29%	26%
Is easy to get to	39%+	33%
Offers the arts and culture I want	32%+	26%
Is unlike any other destination	25%+	16%
Has establishments that provide excellent service	32%+	28%
Makes it easy to find information about things to do in the county before you visit	32%+	26%
Makes it easy to find things to do once in the county	30%	26%
Makes it easy to navigate and get around	28%+	22%
Offers a welcoming environment for visitors	41%+	35%

Seasonal Comparisons

Definitions of Seasons

The definitions of the seasons described in this profile 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 fall and winter do tend to be slightly younger than visitors in other seasons (ranging from 45 years old, on average, in the winter to 48 in the spring).

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.

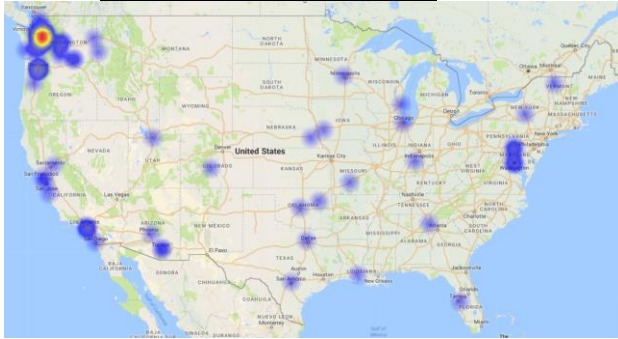
Travel parties tend to consist of about three people in each season – with no difference in the share of travelers who are traveling with children – although spring and summer bring slightly larger parties to the county, on average than do fall and winter.

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 finding that winter visitors are the most likely to be traveling alone.

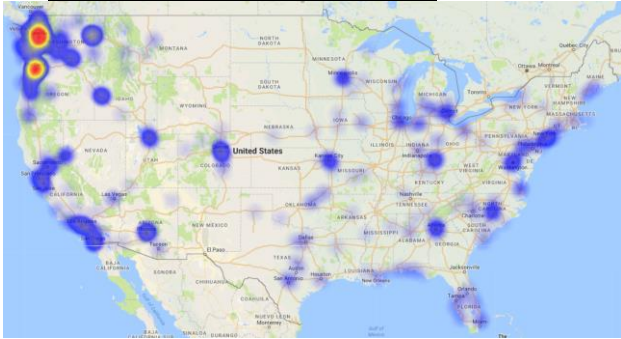
Traveler Characteristics	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Average age (years)	46	45	48 B	47 B
Household income (average)	\$89,000	\$101,000 AD	\$99,000 A	\$95,100
% married	58%	69% A	72% A	71% A
% traveling with children	35%	32%	31%	31%
Travel party size (average number of people)	2.9	2.9	3.2 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 vacation	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.

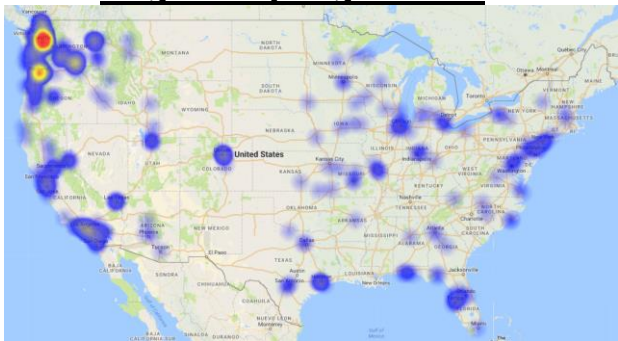
Origin of Fall Visitors



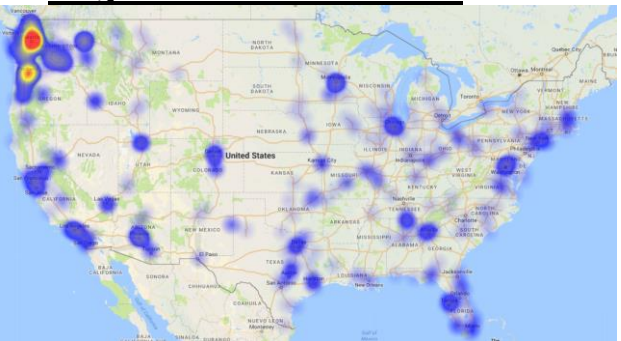
Origin of Winter Visitors



Origin of Spring Visitors



Origin of Summer Visitors



Trip Profile

Summer visits to the county are significantly longer than visits in any other season (about 4 nights on average), and fall visits are the shortest overall (2 nights).

Overall, likely because they take the shortest trips, autumn travelers tend to spend less than do those in other seasons, with traveler parties in the spring and summer spending the most overall.

Trip Characteristics	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
% stating 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

Visitors in the fall are much less likely than those in other seasons to stay in paid lodging while in Pierce County (49%, vs. 69%, 67%, and 63% of visitors in the winter, spring, and summer, respectively).

And while hotels or B&Bs off JBLM are, by far, the most common accommodation type for winter (54%), spring (50%), and summer visitors (42%), these accommodations are much less common for fall visitors (18%).

Fall visitors, by contrast, are most likely to stay in a friend’s or family member’s home (22%, vs. 9% of winter visitors, 11% of spring visitors, and 12% of summer visitors).

Lodging		Fall	Winter	Spring	Summer
		(A)	(B)	(C)	(D)
Percent staying in lodging		49%	69% AD	67% A	63% A
<i>Top Lodging</i>	Hotel/B&B (off JBLM)	18%	54% AD	50% A	42% A
	Home of friend or family member (unpaid)	22% BCD	9%	11%	12% B
	RV park/campground/cabin	3%	<0.5%	2%	5% BC
	Vacation home/timeshare	4%	2%	2%	2%
	Hotel/B&B (on JBLM)	1%	3% AD	2%	1%

Summer visitors plan for their trips further in advance than other travelers, likely reflecting the fact that they spend more time in the county overall.

On average, fall and winter visitors begin planning their visits just over five weeks before leaving for the county, while spring visitors plan their visits more than six weeks in advance and summer visitors plan their visits eight weeks before arriving.

Fall and winter visitors book their overnight accommodations just over four weeks in advance, on average, compared to more than five weeks in advance for spring visitors and more than seven weeks in advance for summer travelers.

Trip Planning	Fall	Winter	Spring	Summer
	(A)	(B)	(C)	(D)
Average trip planning window (planned before leaving home)	5.1 weeks	5.5 weeks	6.4 weeks AB	8.1 weeks ABC
Lodging reservation window (booked accommodations before leaving home)	4.2 weeks	4.8 weeks	5.5 weeks	7.5 weeks ABC

Overall, there are few noteworthy differences in the trip planning resources travelers use based on the season of their visit, though spring and summer visitors use slightly more than others.

Resources		Fall (A)	Winter (B)	Spring (C)	Summer (D)
Average # of resources used (out of 11)		1.8	1.7	1.9 B	1.9 B
Top Re-sources	General internet searches	53%	53%	59%	56%
	Destination websites	41%	36%	40%	36%
	Friends/family/coworkers	40%	34%	39%	40% B
Average # of websites used (out of 15)		1.3	1.2	1.5 BD	1.4 B
Top Websites	Online search engines	30%	28%	34%	30%
	Hotel websites	15%	28% AD	32% AD	21%
	Facebook	12%	15%	17%	16%
	TripAdvisor	18%	12%	18% B	15%
	Booking websites	14%	11%	16% BD	12%

Predictably, the attractions visitors go to when in the county vary with the seasons.

For example, more than seven out of ten surveyed visitors in the summer go to an outdoor attraction (74%), compared to about half in the fall (50%) and spring (54%), and only four out of ten in the winter (39%).

In addition, almost nine out of ten surveyed visitors in the fall go to museums (86%), compared to about six out of ten in the winter (56%) and spring (62%) and four out of ten in the summer (42%).

There is little noteworthy variation across the seasons in attendance at arts and cultural attractions, with roughly one out of ten visitors visiting in any season (ranging from 8% in the summer to 14% in the winter).

Attractions	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Percent visiting museums	86% BCD	56% D	62% D	42%
Average # of museums visited (out of 10)	1.2 BCD	.8 D	.9 D	.6
Percent visiting outdoor attractions	50% B	39%	54% B	74% ABC
Average # of outdoor attractions (out of 17)	1.1 B	.7	.9 B	1.5 ABC
Percent visiting arts & cultural attractions	13%	14% D	11%	8%
Average # of arts and cultural attractions visited (out of 5)	.2	.2 CD	.1	.1

Seven out of ten visitors in the winter take part in activities that let them see the county (69%, 1.2 activities on average, overall), rising to eight out of ten in the spring (80%, 1.5 activities) and summer (84%, 1.5), and peaking at nine out of ten visitors in the fall (91%, 1.9 activities).

There is little variation across seasons in the popularity of entertainment and recreation activities: roughly seven out of ten visitors take part in this type of activity broadly, with the typical visitor engaging in almost two of the 8 activities listed in the questionnaire.

Three out of ten visitors in the winter engage in an outdoor recreation activity (30%, engaging in .6 out of 13 activities overall), compared to about four out of ten in the fall (42%, .8 activities) and spring (44%, .9) and rising to nearly six out of ten in the summer (56%, 1.2 activities).

Activity Types	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Percent seeing the county	91% BCD	69%	80% B	84% B
Average # of activities related to seeing the county (out of 8)	1.9 BCD	1.2	1.5 B	1.5 B
Percent engaging in entertainment and recreation activities	68%	74%	70%	73%
Average # of entertainment and recreation activities (out of 8)	1.7	1.5	1.6	1.6
Percent engaging in outdoor activities	42% B	30%	44% B	56% ABC
Average # of outdoor activities (out of 13)	.8	.6	.9 B	1.2 ABC

Predictably, visitors in different seasons engage in different specific activities.

Outdoor activities and special events are more common among visitors who were surveyed in the summer, while arts and cultural activities (including visiting museums and historical sites specifically) are most common in the fall.

Activities	Fall (A)	Winter (B)	Spring (C)	Summer (D)	
<i>Top Activities</i>	Visiting museums	50% BCD	31% D	33% D	19%
	Dining out	43%	46% D	48% D	40%
	Spending time with family/friends	35%	27%	34% B	31%
	Relaxing	30% B	20%	24%	26% B
	Shopping	23%	20%	21%	24% B
	Arts/culture	37% BCD	20%	24% D	17%
	Festivals/special events	8%	10%	16% AB	30% ABC
	Visiting historical sites	28% BCD	11%	15% B	18% B
	Mt. Rainier	16% B	6%	11% B	23% BC
	Trail hiking	13%	10%	14%	22% ABC

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.

However, visitors in the winter are less likely than those in other seasons to recommend the county as a place to visit.

Satisfaction	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 recommend to others (% rating 4 or 5 on scale of 1: “Definitely will not” to 5: “Definitely will”)	78% B	69%	77% B	82% 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.

Visitors in the summer are particularly likely to feel most of these positive statements describe the county *extremely well*.

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 (A)	Winter (B)	Spring (C)	Summer (D)
	Offers a beautiful, natural environment	85% B	77%	83% 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

Descriptiveness of Positive Statements				
About the County (% selecting: "Statement describes the county extremely well")	Fall (A)	Winter (B)	Spring (C)	Summer (D)
Offers a beautiful, natural environment	43%	34%	45% B	56% ABC
Offers reasonably priced lodging	28%	22%	23%	30% BC
Offers plenty to see and do	41%	33%	38%	48% BC
Has a clean, unspoiled environment	35% B	21%	27% B	42% BC
Offers affordable dining	25%	25%	24%	32% BC
Is easy to get to	32%	32%	35%	38% B
Offers the arts and culture I want	27%	28%	26%	29%
Is unlike any other destination	21%	15%	13%	26% BC
Has establishments that provide excellent service	27%	26%	25%	34% BC
Makes it easy to find information about things to do in the county before you visit	20%	24%	24%	35% ABC
Makes it easy to find things to do once in the county	23%	22%	25%	35% ABC
Makes it easy to navigate and get around	26%	18%	21%	32% BC
Offers a welcoming environment for visitors	35%	31%	32%	45% BC

Drivers and Fliers

Traveler Profile

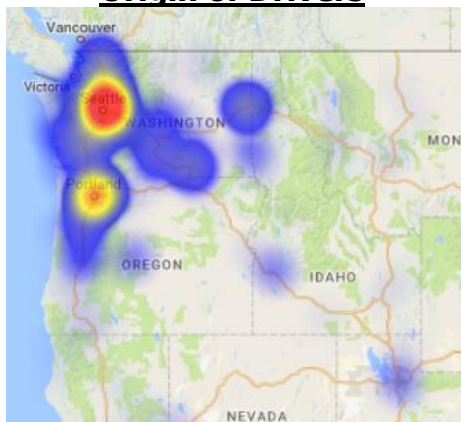
Two out of three visitors to Pierce County between the fall of 2015 and the summer of 2016 came to the area by car (64%). Nearly all of the rest, (33% of all travelers) arrived by plane.

Demographically, drivers are similar to fliers in age (46 vs. 47 years old, on average) and marital status (71% of each type of visitor are married). At the same time, fliers 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%).

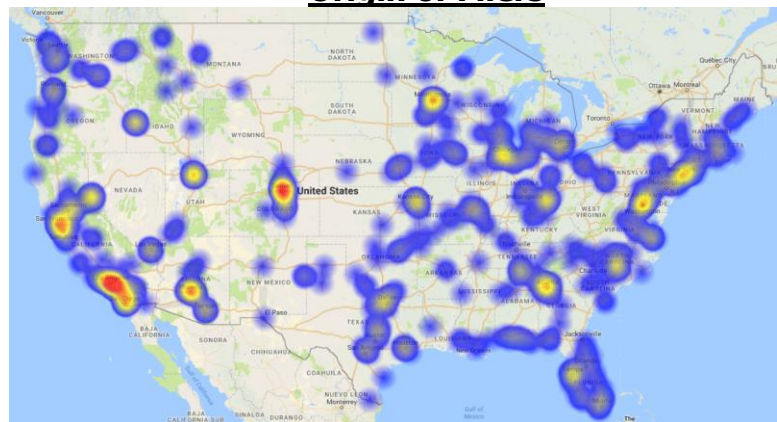
Fliers also have higher household incomes than drivers (\$104,000 on average vs. \$96,000) and have made fewer recent visits to the county (2.9 vs. 5.0 visits in the last five years).

Traveler Characteristics		
	Drivers	Fliers
Average age (years)	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 vacation	57%+	39%
% from Washington	65%+	3%

Origin of Drivers



Origin of Fliers



Trip Profile

The typical flier 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).

Trip Characteristics		
	Drivers	Fliers
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

Almost six out of ten drivers stay in overnight accommodations while in the county (56%), compared to nearly eight out of ten who fly (77%).

Hotels and B&Bs are, by far, the most common type of lodging for all visitors, and those who fly to the county are much more likely to stay in this type of lodging than are those who drive to the county (64% vs. 39%). Fliers are also more likely than drivers to stay in the next most common type of lodging – the home of a family member or friend (16% vs. 9%)

Lodging		
	Drivers	Fliers
Percent staying in lodging	56%	77%+
<i>Top Lodging</i>	Hotel/B&B (off JBLM)	39%
	Home of friend or family member (unpaid)	9%
	RV park/campground/cabin	4%+
	Vacation home/timeshare	2%
	Hotel/B&B (on JBLM)	1%

On average, drivers begin planning their trips and make lodging reservations nearly six weeks before their trip. Fliers have longer planning windows – they begin planning their trips 9 weeks in advance, on average, and make lodging reservations 6 weeks before their trip.

Trip Planning		
	Drivers	Fliers
Average trip planning window (planned before leaving home)	5.6 weeks	8.6 weeks+
Lodging reservation window (booked accommodations before leaving home)	5.7 weeks	6.2 weeks

Those who fly to the county use slightly more trip planning resources than do drivers overall. And while drivers are more likely to use destination websites (39% vs. 33%), fliers are more apt to rely on friends and family (44% vs. 34%, perhaps reflecting the fact that they are more likely to stay with friends and family).

Fliers use more websites to plan their trips, on average, though this appears to be driven by the need to book or find information about their hotel-based lodging.

Resources		Drivers	Fliers
Average # of resources used (out of 11)		1.8	1.9+
<i>Top Resources</i>	General internet searches	56%	54%
	Destination websites	39%+	33%
	Friends/family/coworkers	34%	44%+
Average # of websites used (out of 15)		1.3	1.5+
<i>Top Websites</i>	Online search engines	29%	32%
	Hotel websites	22%	32%+
	Facebook	16%	14%
	TripAdvisor	12%	19%+
	Booking websites	10%	17%+

Attractions and Activities

More than half of drivers (56%) and fliers (53%) visit outdoor attractions – with each visiting about one of these attractions during their stay, on average.

Roughly half of all travelers visit museums in the county, regardless of how they arrive (52% of drivers and 54% of fliers visit a museum). At the same time, fliers visit more museums than do drivers (.9 out of 10, on average, compared to .8 on average for drivers).

Just over one out of ten visit the county’s arts and cultural attractions (drivers: 12%; fliers: 11%), with no difference in the number of these attractions these travelers visit.

Attractions		Drivers	Fliers
Percent visiting outdoor attractions		56%	53%
Average # of outdoor attractions (out of 17)		1.0	1.1
Percent visiting museums		52%	54%
Average # of museums visited (out of 10)		.8	.9+
Percent visiting arts & cultural attractions		12%	11%
Average # of arts and cultural attractions visited (out of 5)		.1	.1

While drivers and fliers are equally likely to engage in some form of sightseeing activity (77% of drivers and 78% of fliers), fliers engage in slightly more of these activities than drivers, on average (1.6 vs. 1.3, out of 8 listed in the questionnaire).

Almost seven out of ten fliers take part in entertainment and recreation activities (66%, 1.4 activities on average overall), compared to almost nine out of ten fliers (86%, 1.9 activities).

Four out of ten visitors engage in outdoor activities (42% among drivers and fliers), and each type of visitor engages in about one of these activities overall, on average (.9 each, out of 13).

Activity Types	Drivers	Fliers
Percent seeing the county	77%	78%
Average # of activities related to seeing the county (out of 8)	1.3	1.6+
Percent engaging in entertainment and recreation activities	66%	86%+
Average # of entertainment and recreation activities (out of 8)	1.4	1.9+
Percent engaging in outdoor activities	42%	42%
Average # of outdoor activities (out of 13)	.9	.9

Likely as a result of their longer stays, fliers are more likely than drivers to engage in several specific activities in the county. Six out of ten fliers (58%) and almost four out of ten drivers dine out (37%) while in the county, making it the most popular activity for travelers overall.

Many also visit museums (30% of fliers, 26% of drivers), spend time relaxing (29%, 21%), or go shopping (27%, 19%).

Activities		Drivers	Fliers
<i>Top Activities</i>	Visiting museums	26%	30%
	Arts/culture	19%	22%
	Festivals/special events	21%+	15%
	Dining out	37%	58%+
	Spending time with family/friends	27%	37%+
	Relaxing	21%	29%+
	Shopping	19%	27%+

Views Toward the County and Trip Satisfaction

Both fliers and drivers are typically highly pleased with their trips to Pierce County (each providing average ratings of 4.4 on a 5-point scale). Three out of four are likely to recommend a trip to the county to others (76% of drivers, and 75% of fliers).

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%).

Satisfaction	Drivers	Fliers
Average satisfaction rating (scale of 1: "Very dissatisfied" to 5: "Very satisfied")	4.4	4.4
Percent likely to recommend to others (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	76%	75%
Percent likely to return (% rating 4 or 5 on scale of 1:"Definitely will not" to 5:"Definitely will")	85%+	76%

Most fliers and drivers believe Pierce County is described by almost all of the 13 positive statements listed in the questionnaire. At the same time, fliers 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	Fliers
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%+

Descriptiveness of Positive Statements About the County (% selecting: "Statement describes the county extremely well")		
	Drivers	Fliers
Offers a beautiful, natural environment	44%	47%
Offers reasonably priced lodging	25%	27%
Offers plenty to see and do	40%	42%
Has a clean, unspoiled environment	30%	33%
Offers affordable dining	26%	29%
Is easy to get to	37%+	31%
Offers the arts and culture I want	28%	27%
Is unlike any other destination	20%	17%
Has establishments that provide excellent service	28%	32%
Makes it easy to find information about things to do in the county before you visit	28%	29%
Makes it easy to find things to do once in the county	26%	30%
Makes it easy to navigate and get around	25%	24%
Offers a welcoming environment for visitors	35%	39%