



STATE OF WASHINGTON  
DEPARTMENT OF COMMUNITY,  
TRADE AND ECONOMIC DEVELOPMENT

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## Olympic & Kitsap Peninsulas Visitor Profile 2002

April 2003

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**Prepared for:**

Washington State Office of Trade and  
Economic Development  
Business & Tourism Development  
[www.experiencewashington.com/industry](http://www.experiencewashington.com/industry)

**In cooperation with:**

City of Port Townsend  
Kitsap Peninsula VCB  
North Olympic Peninsula VCB

**Martha Choe**  
Director

## Introduction

Welcome to the Olympic & Kitsap Peninsulas 2002 Visitor Profile Report. This report is posted to this website in Adobe Acrobat Portable Document Format (PDF).

Please refer to the Table of Contents to gain an overview of the categories covered within this report.

To locate a specific section, chart or table within the report, refer to the page numbers printed in the table of contents. As you scroll through the document, you will see the page numbers in the status bar at the bottom left area of your screen.

## Methodology

- ▶ During the months of July-October, 2001, seventeen electronic, programmable survey instruments were placed at attractions and visitor centers throughout the **Olympic & Kitsap Peninsulas** of Washington State.
- ▶ The counties included in the study were: Clallam, Jefferson, and Kitsap.
- ▶ The primary purpose of this study is to provide information on origin and characteristics of seasonal visitors to this area of Washington State.
- ▶ A total of 4,204 surveys were used in compiling the data for this report. Strong emphasis was given to the sub-set of all **overnight visitors**.
- ▶ Surveys were “self-selecting” (i.e., voluntary). A rigorous, methodic editing process is applied to eliminate invalid and irregular responses.
- ▶ Because respondents self-select, they also may choose not to respond to each question in the survey. Therefore the total sample size per question may vary. A calculation of the lowest sample size yields a 95% confidence interval of  $\pm 1.6\%$ .
- ▶ As with all self-selected sampling, it is advised that these results be interpreted with some caution.

# Olympic & Kitsap Peninsulas 2002 Visitor Profile

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## F. COMPARISON WITHIN OLYMPIC/KITSAP PENINSULAS

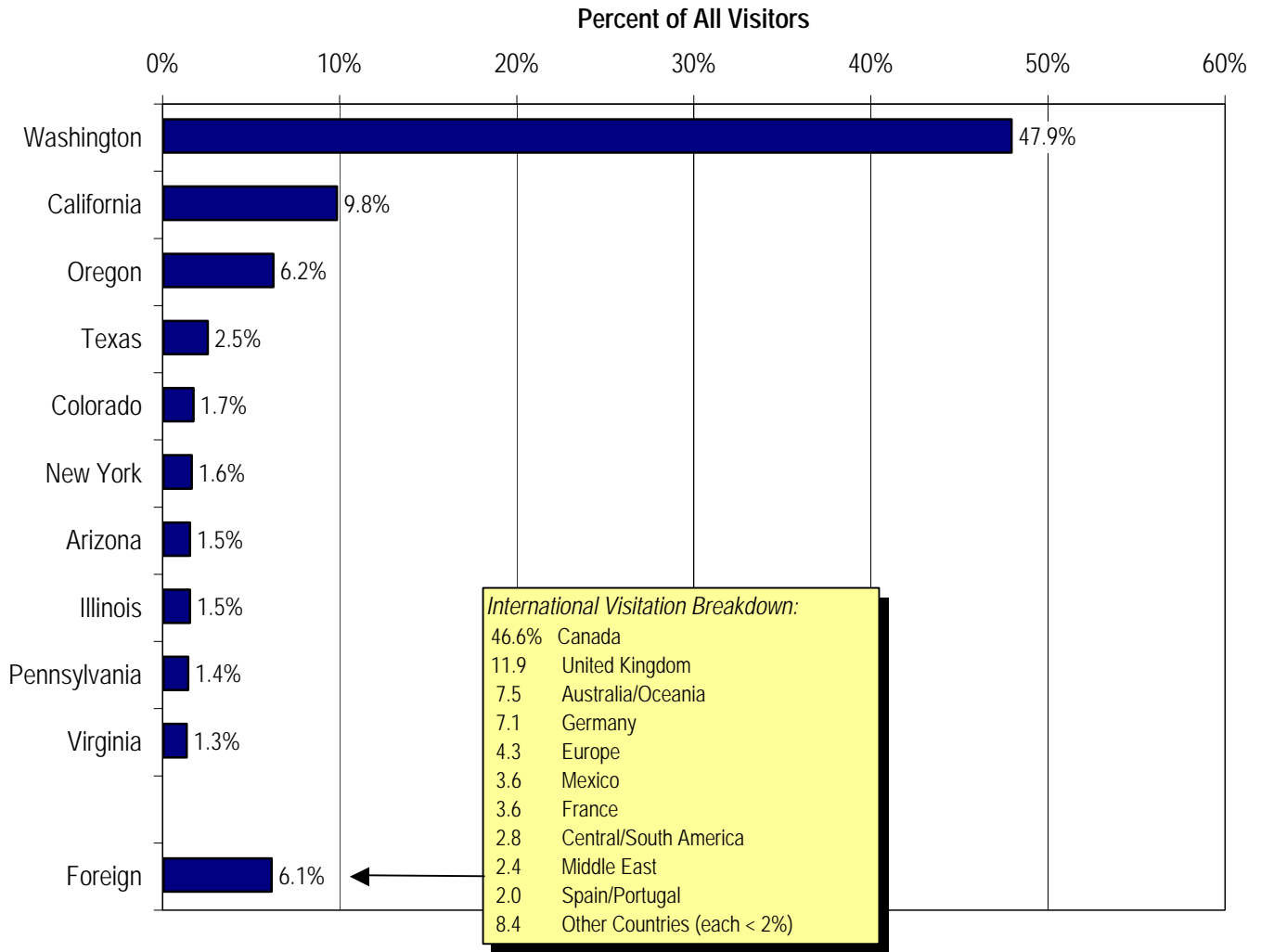
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# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## VISITOR ORIGIN – ALL VISITORS

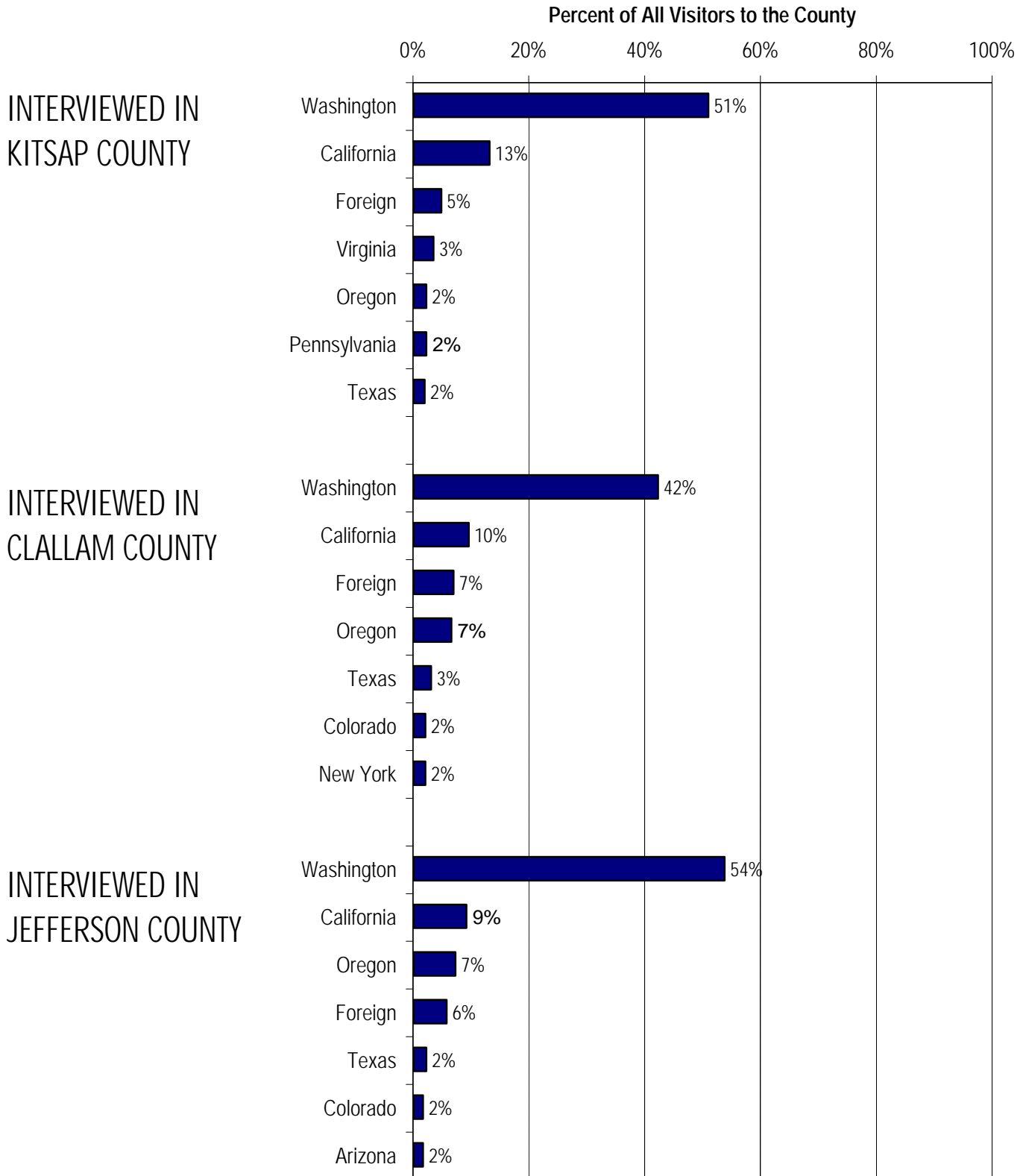
*(top 10 states and international)*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## VISITOR ORIGIN – TOP STATES FOR EACH COUNTY

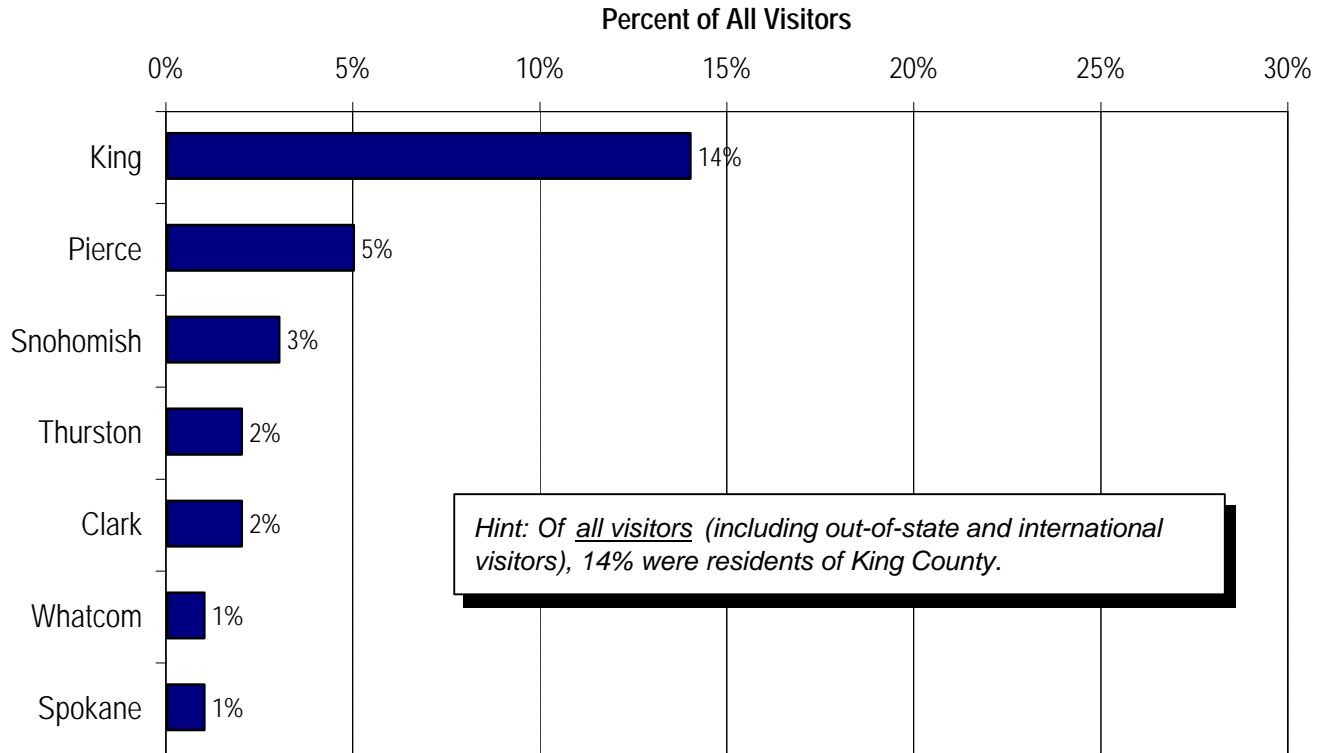
*by county where interviewed*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## VISITOR ORIGIN – WASHINGTON RESIDENTS

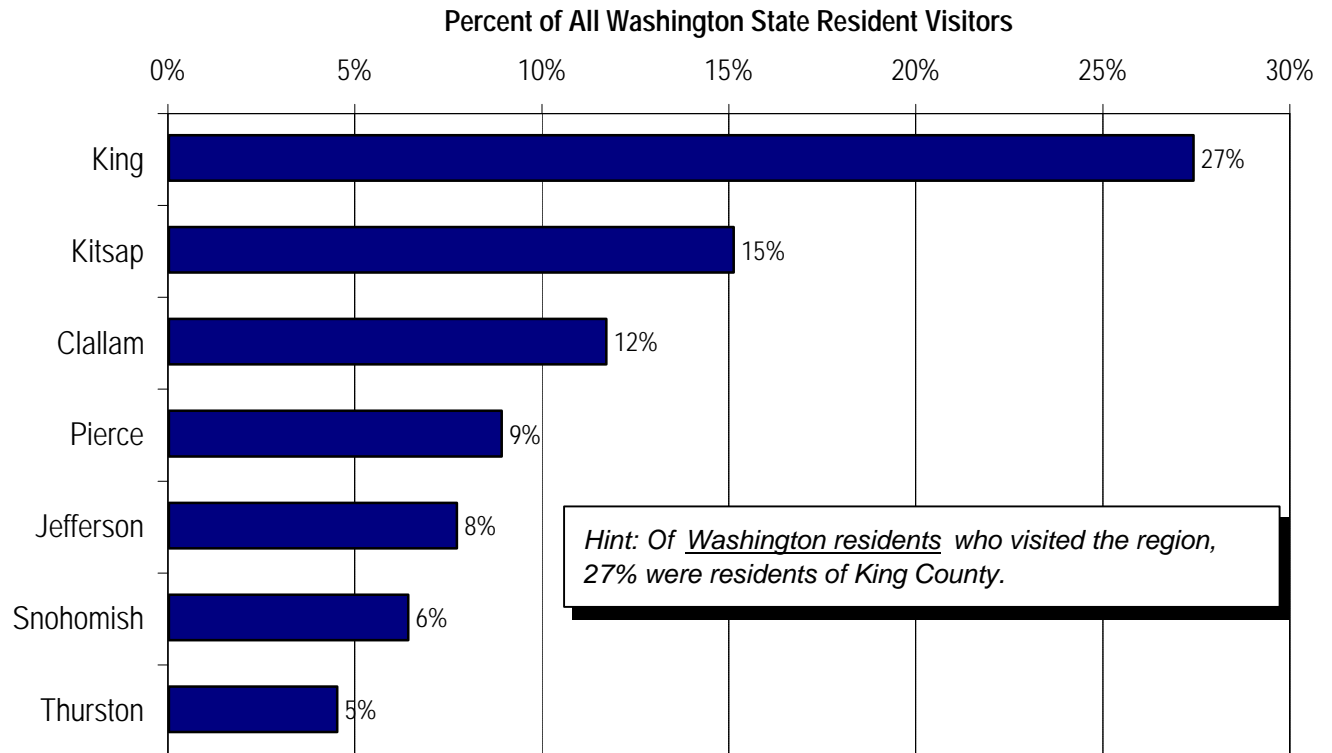
*all interview locations combined*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

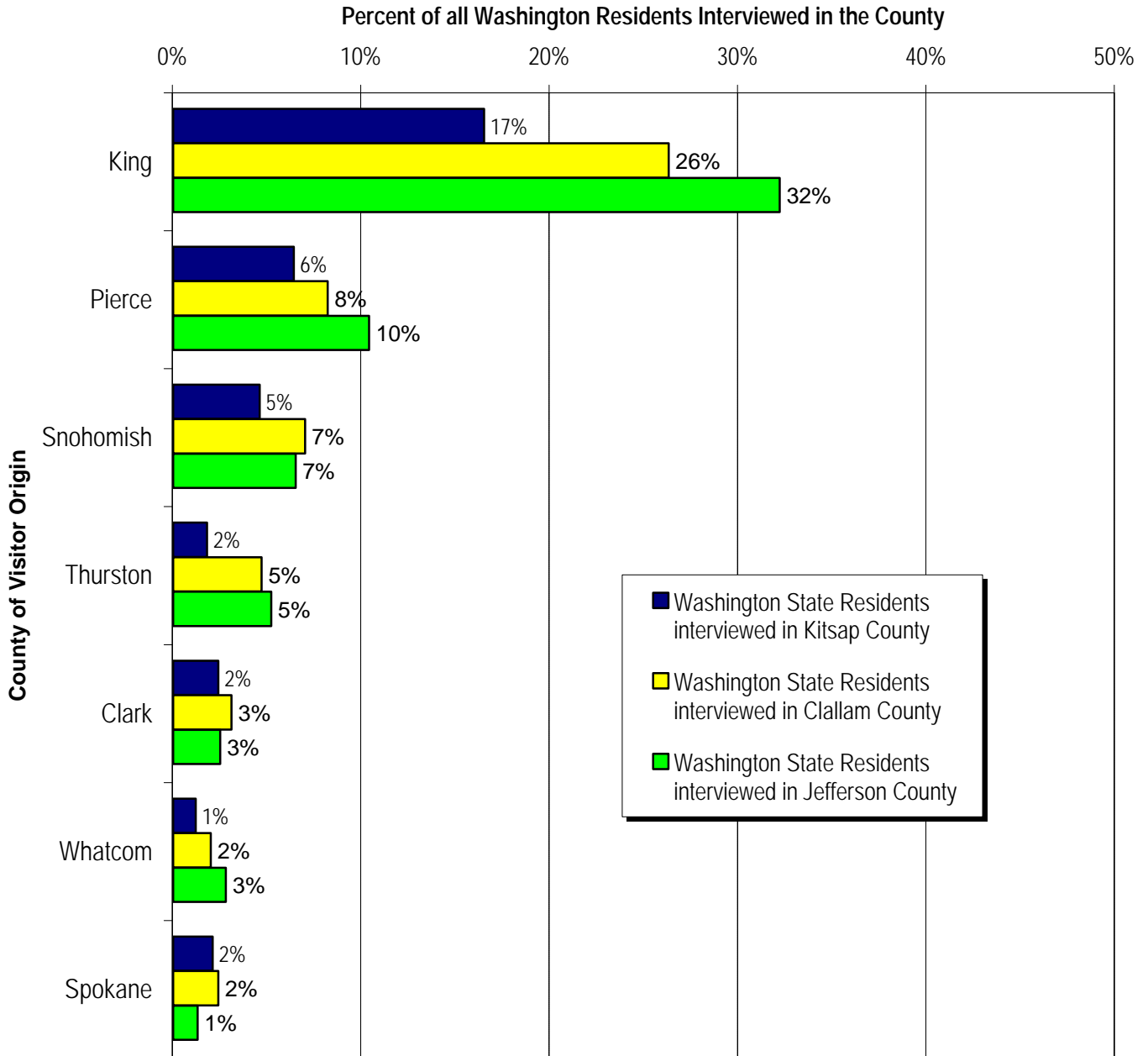
## VISITOR ORIGIN – WASHINGTON RESIDENTS

*all interview locations combined*



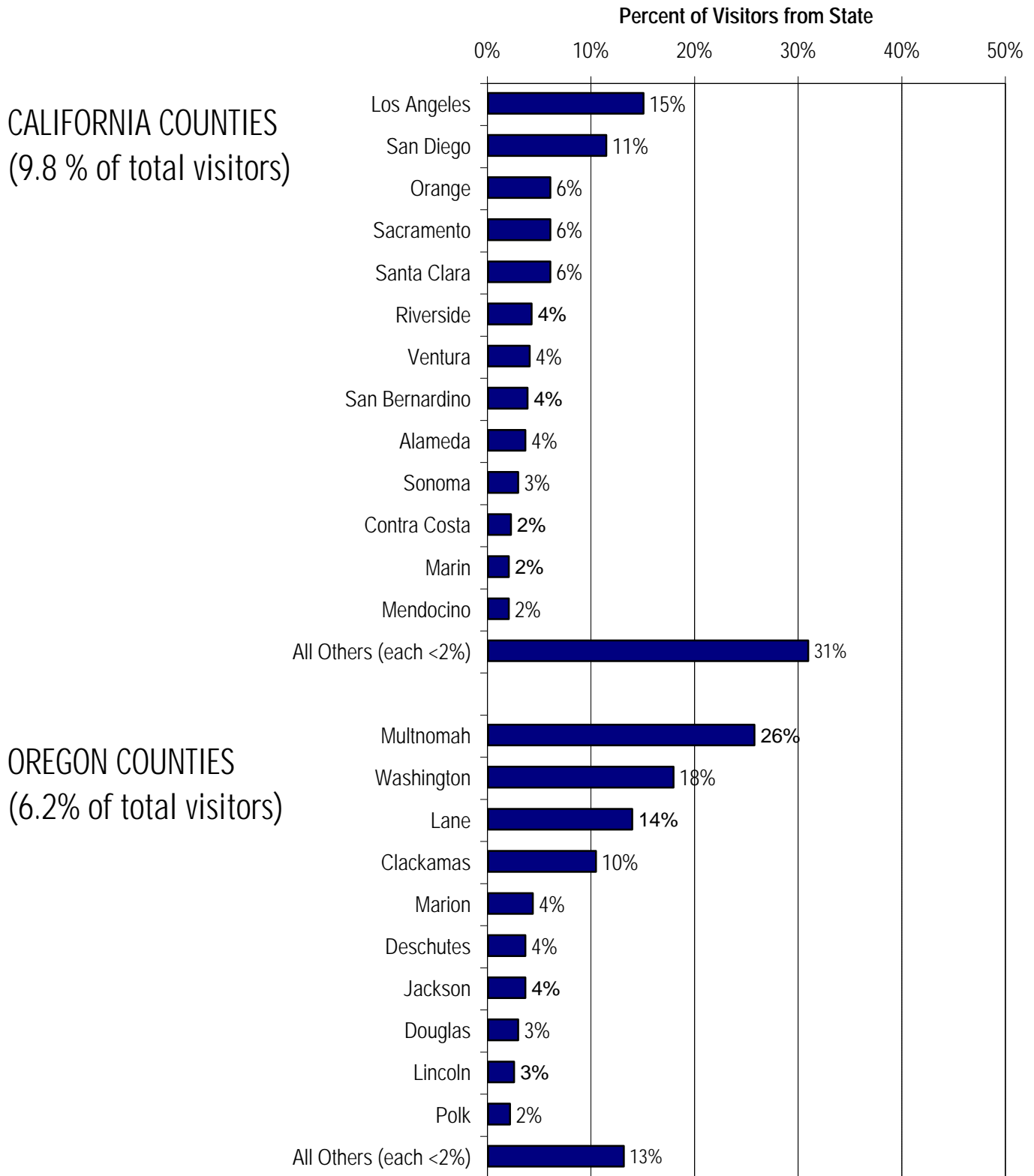
# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## VISITOR ORIGIN – WASHINGTON RESIDENTS BY COUNTY

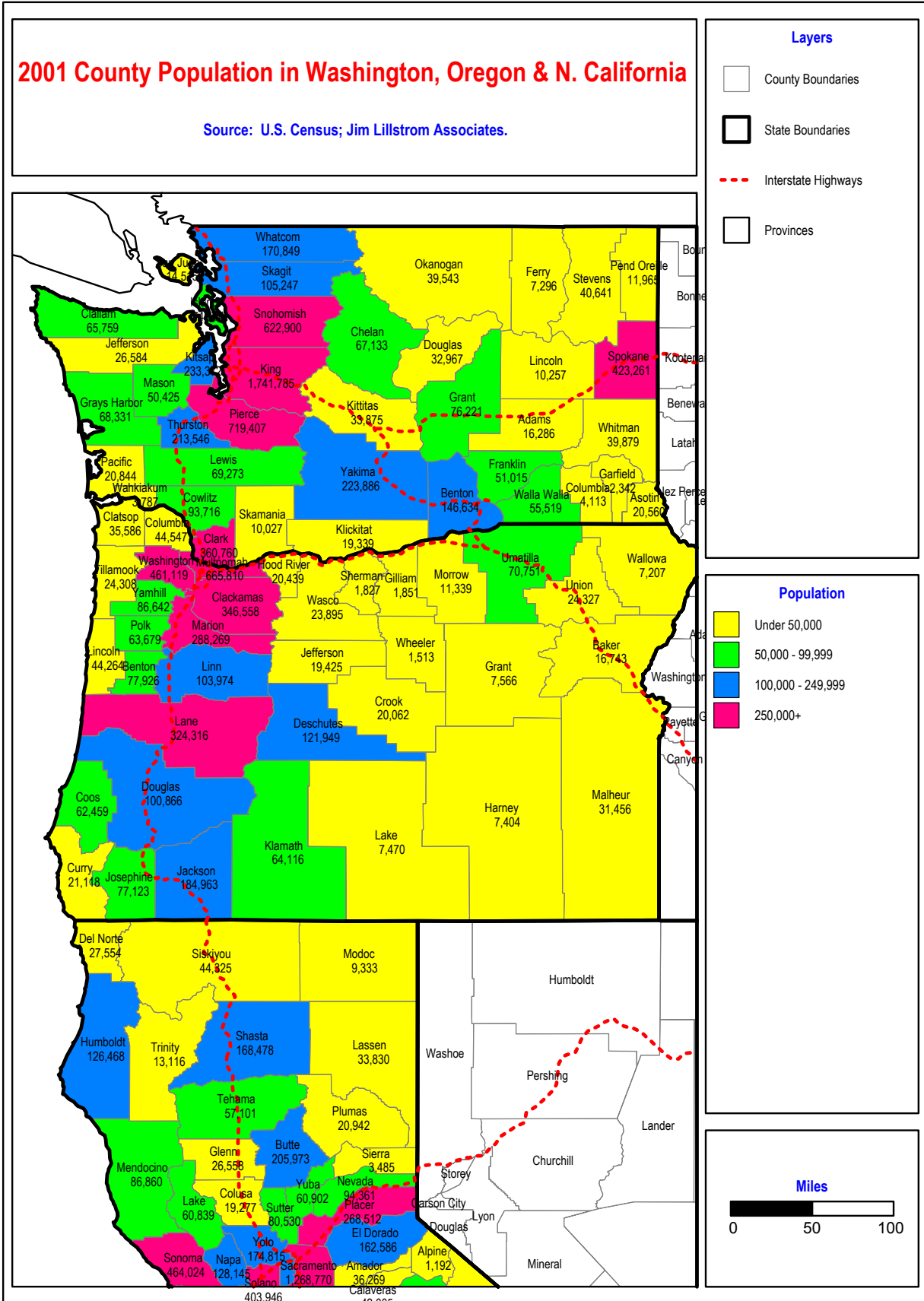


# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## VISITOR ORIGIN – TOP CALIFORNIA & OREGON COUNTIES



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

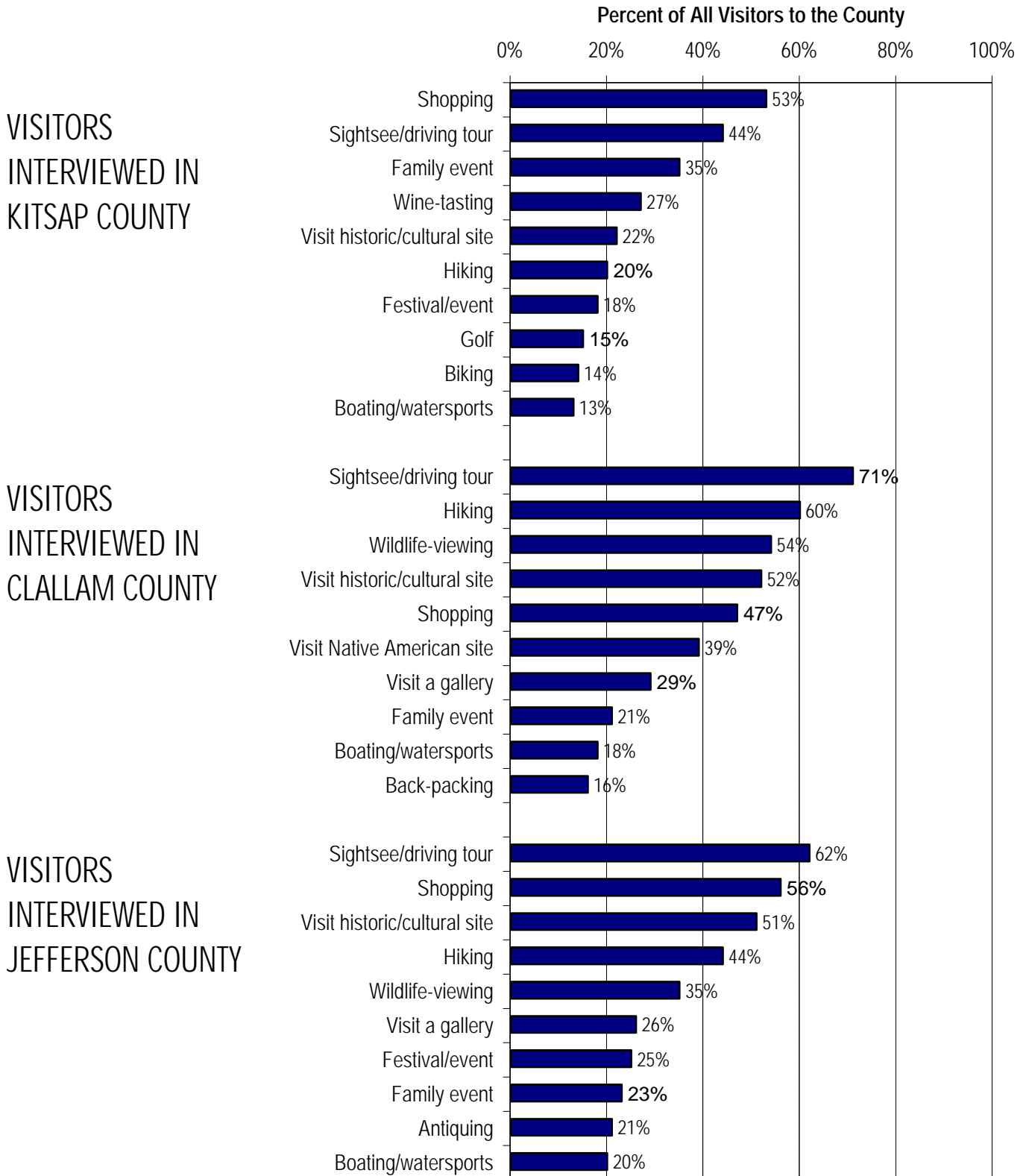




# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## TOP 10 ACTIVITIES

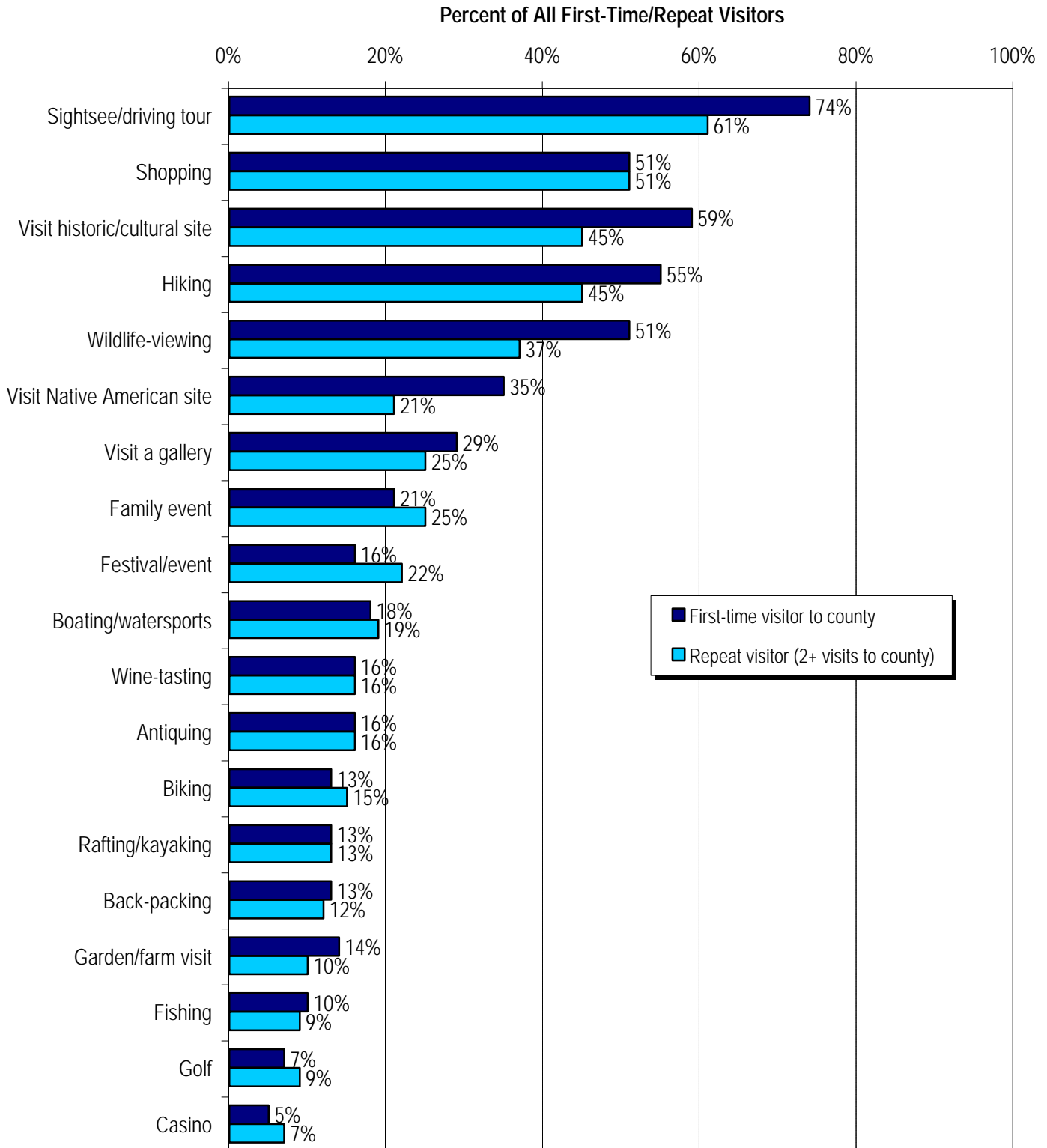
*by county where interviewed*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – ALL VISITORS

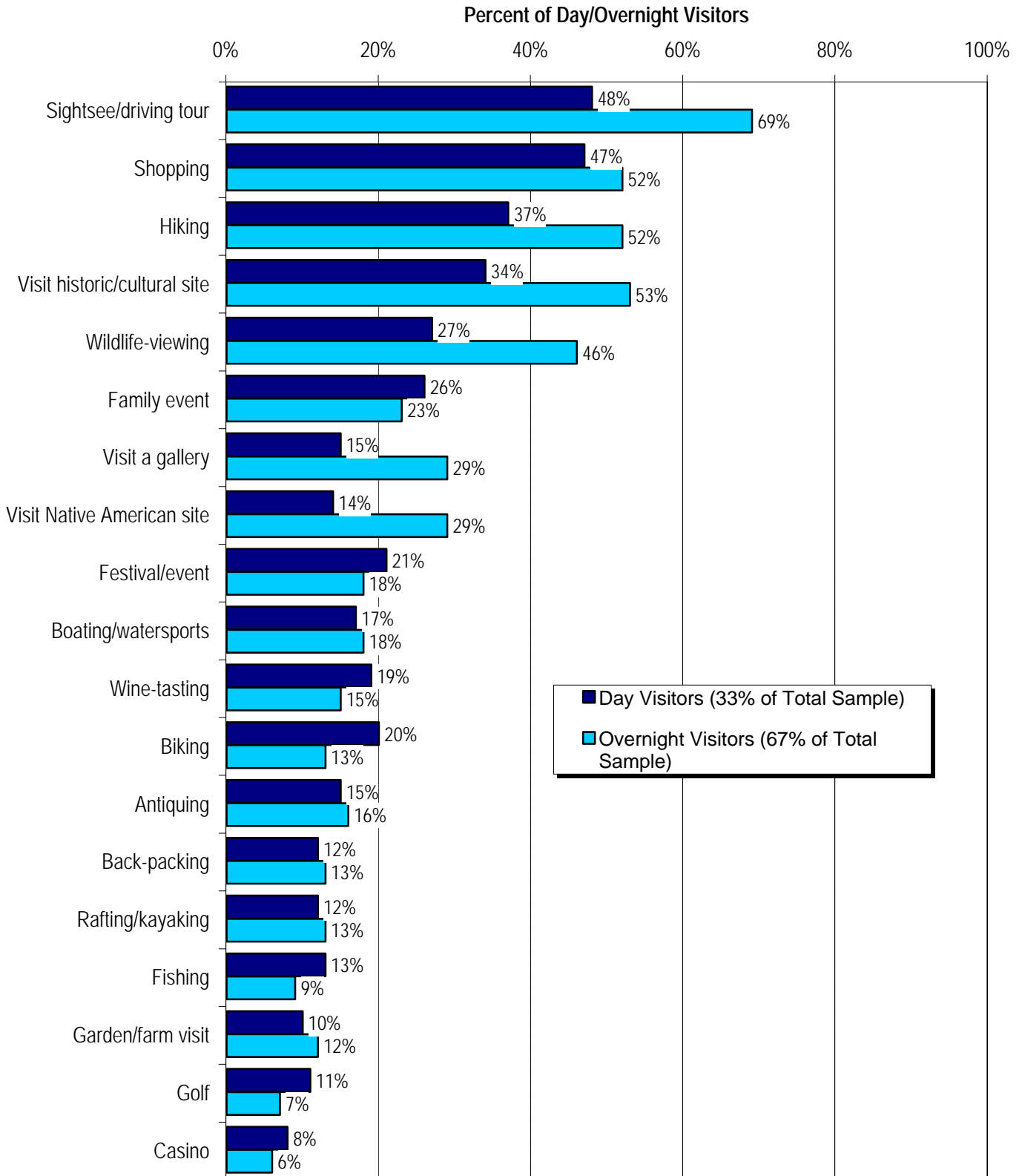
*repeat vs. first-time visitors*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP

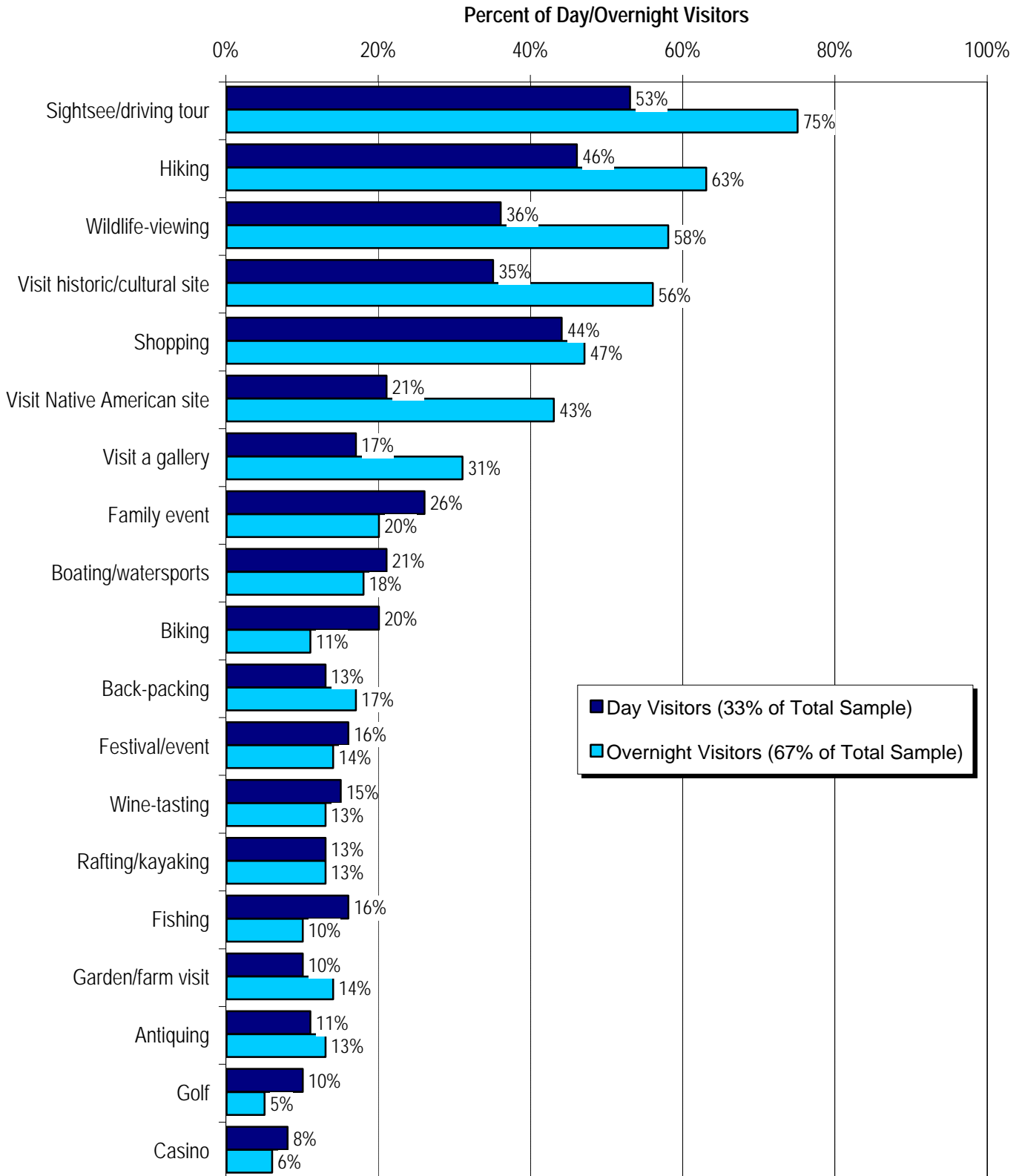
*by day vs. overnight visitors – all interview locations combined*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP

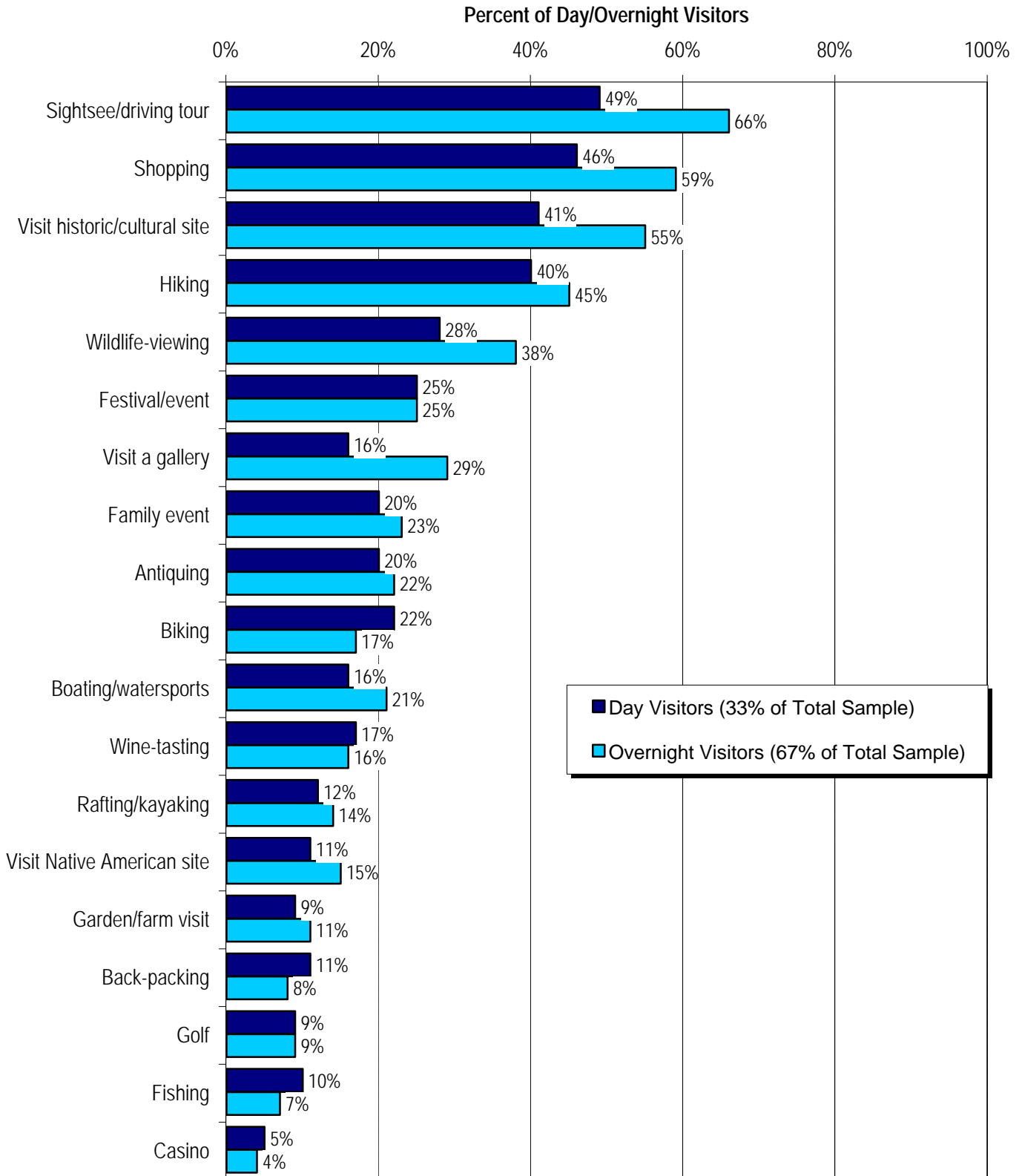
*by day vs. overnight visitors – Interview Location: Clallam County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP

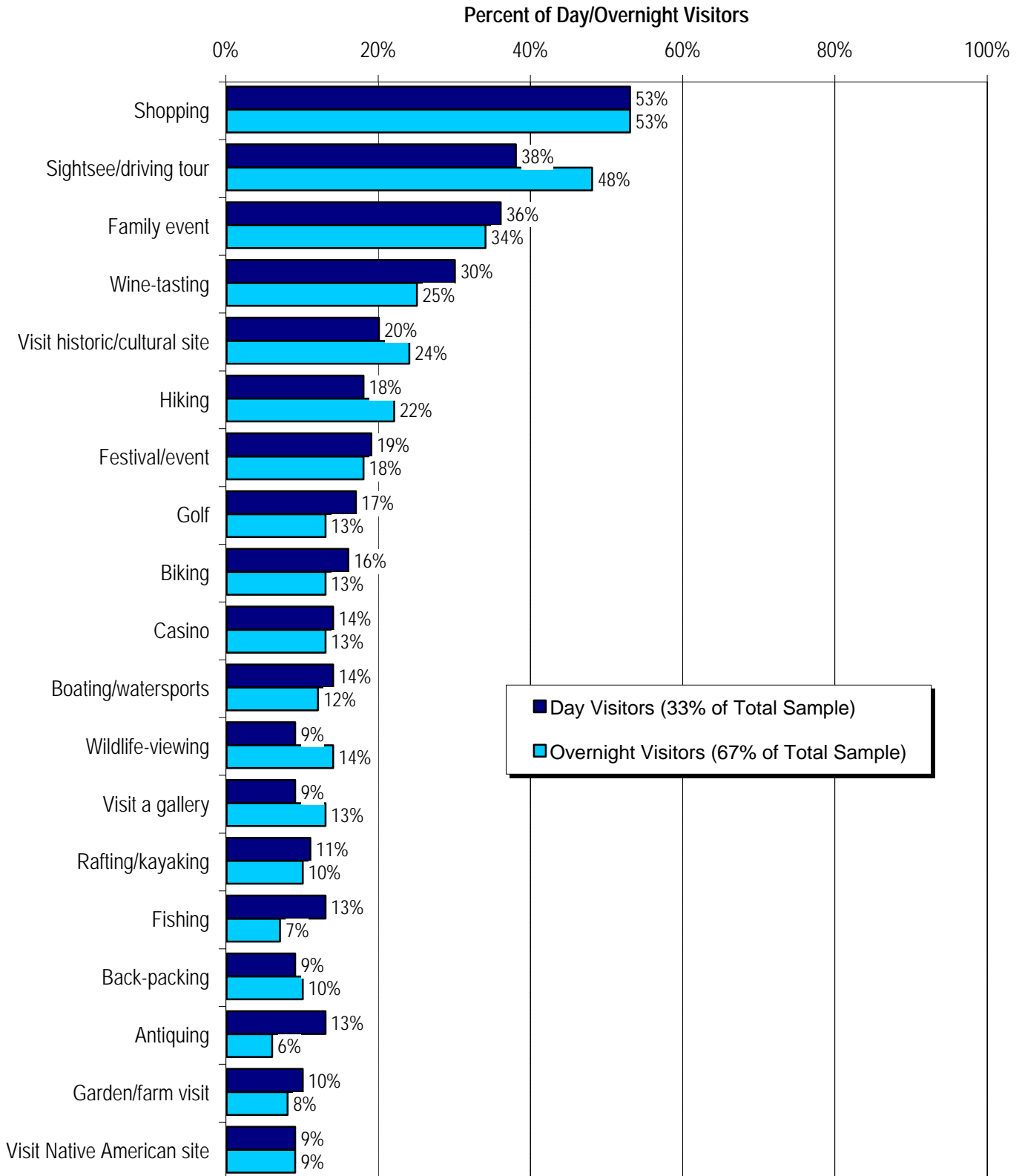
*by day vs. overnight visitors – Interview Location: Jefferson County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP

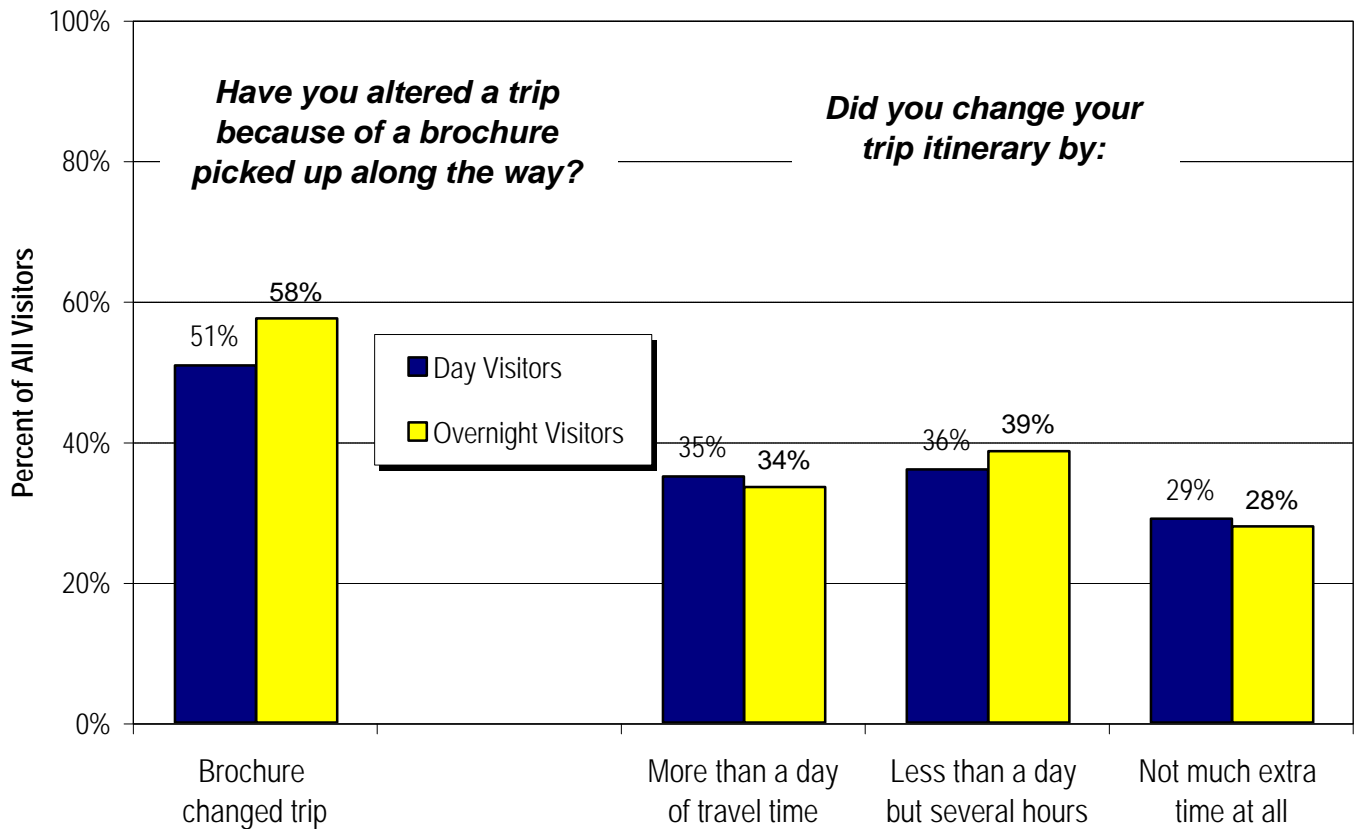
*by day vs. overnight visitors – Interview Location: Kitsap County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

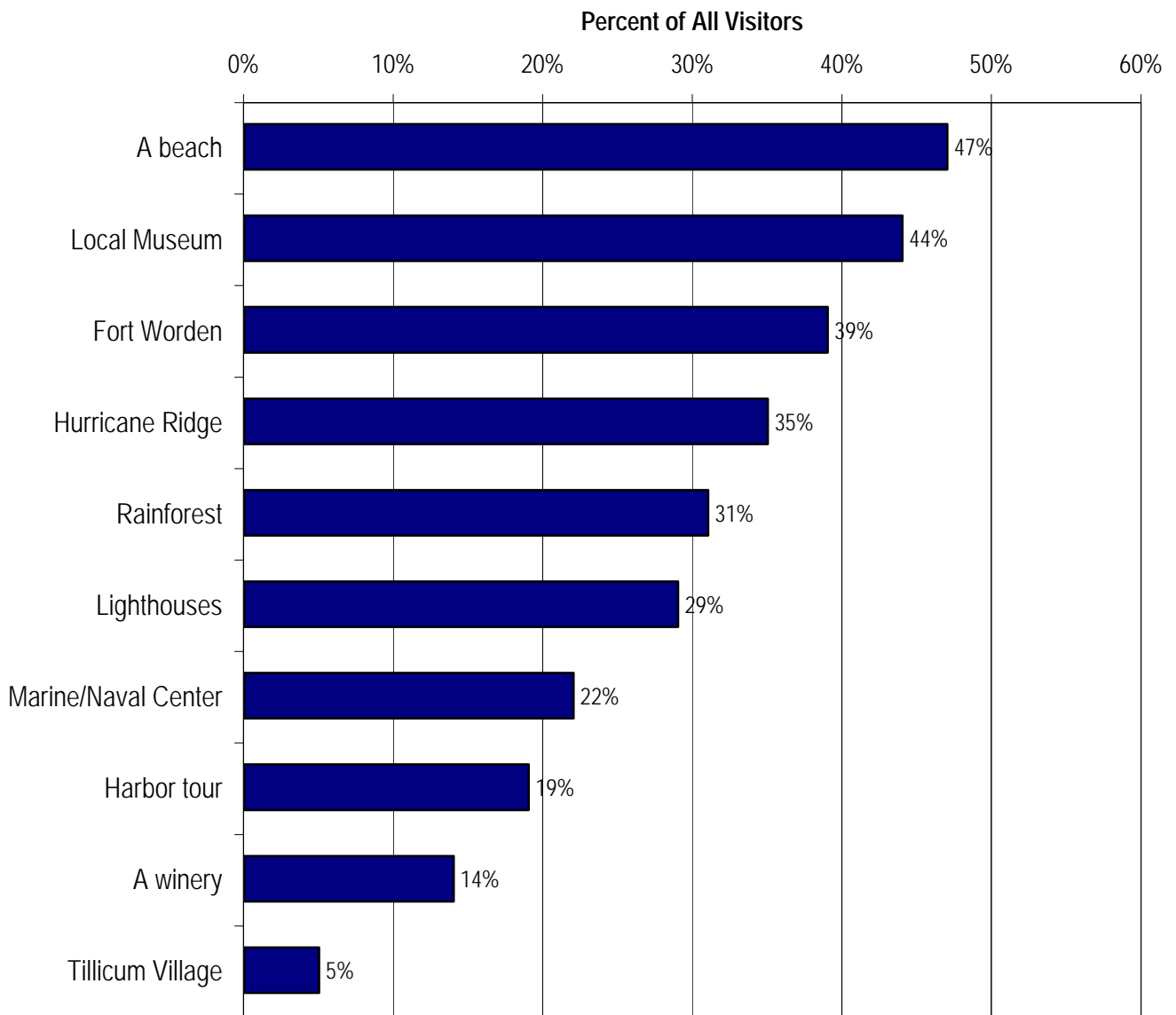
## BROCHURE INFLUENCE ON ITINERARY (during trip)

*by Day vs. Overnight*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

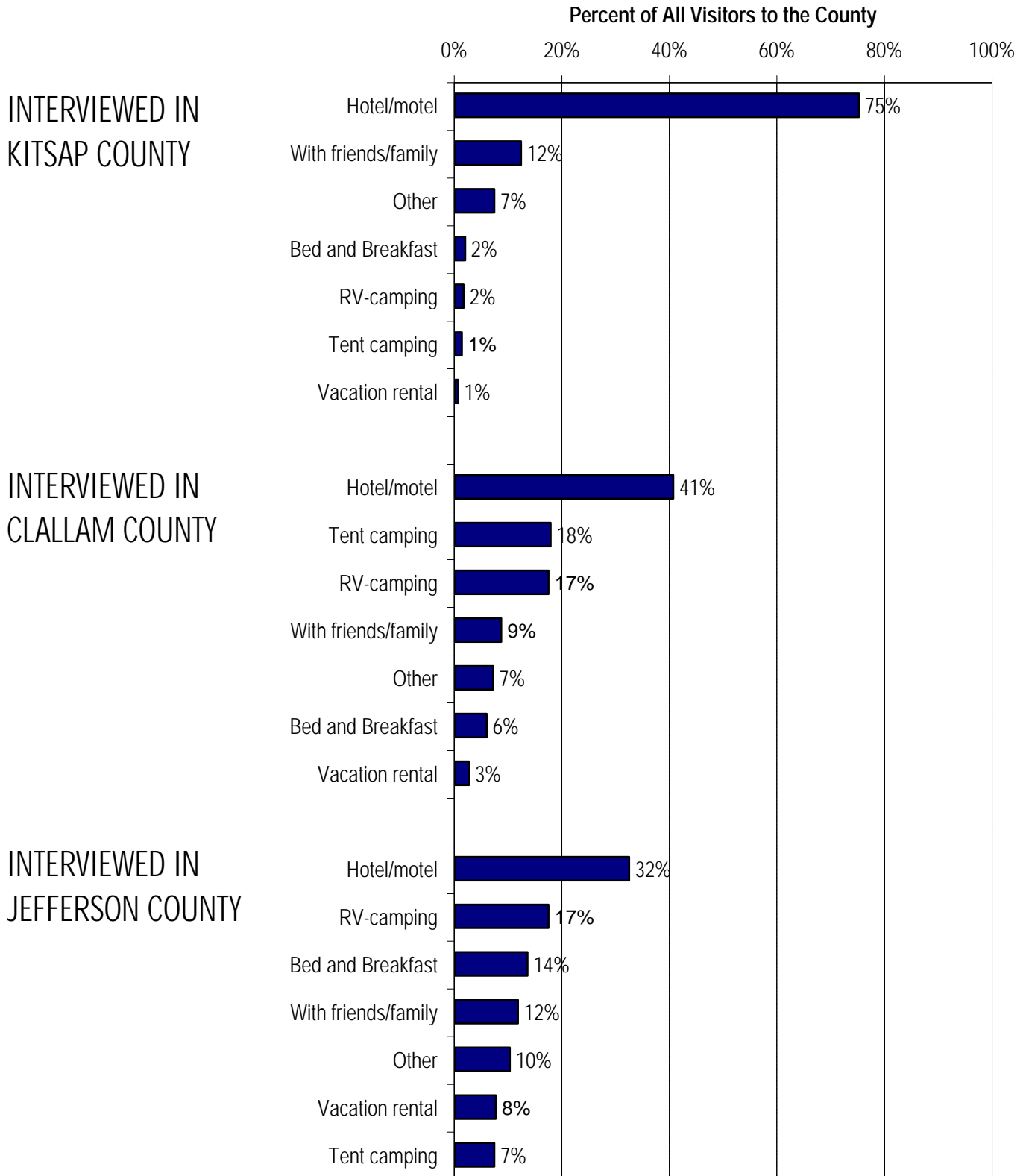
## SPECIFIC ATTRACTIONS VISITED – ALL VISITORS



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## OVERNIGHT VISITOR ACCOMMODATION PREFERENCE

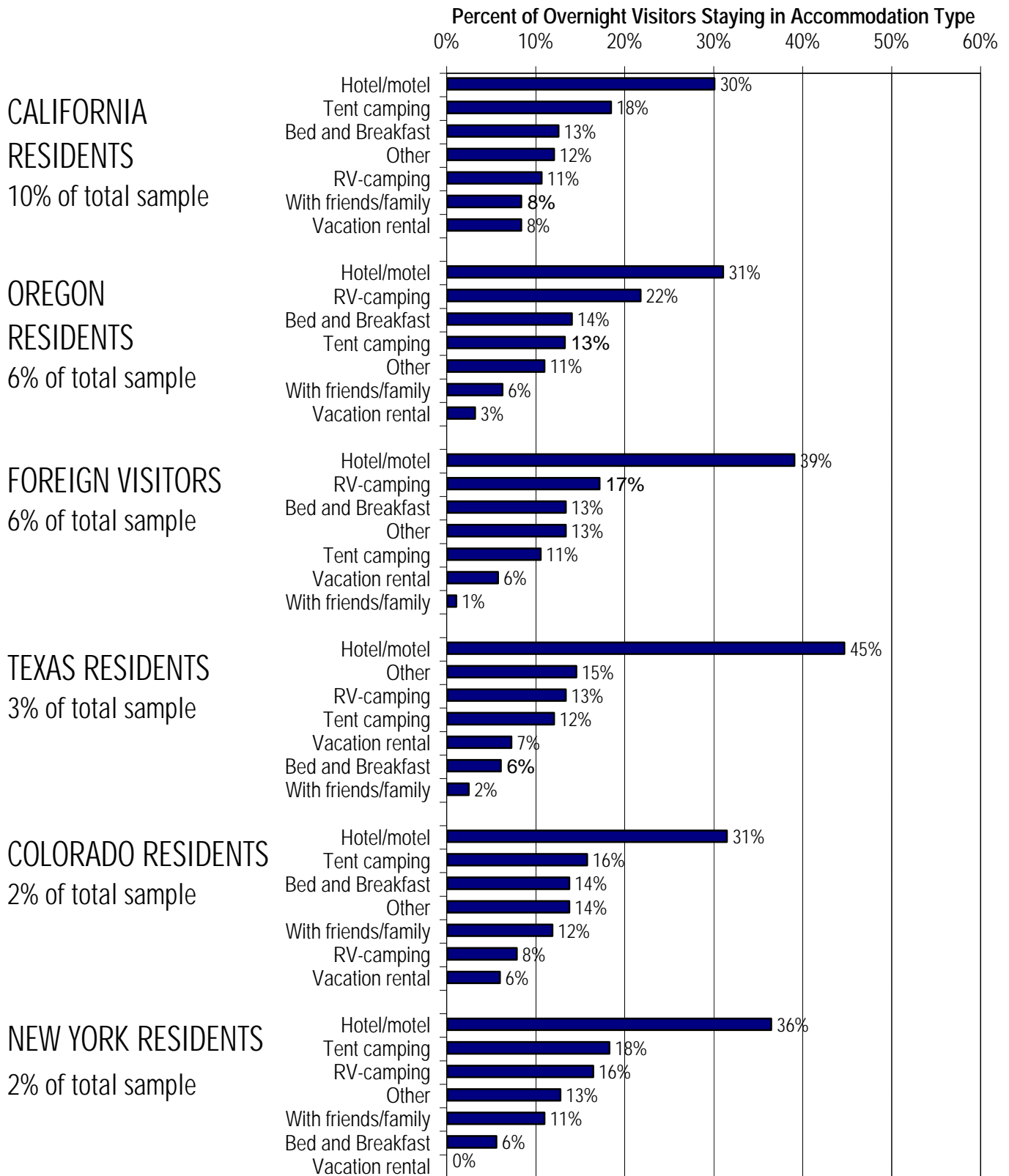
*by county where interviewed*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## OVERNIGHT VISITOR ACCOMMODATIONS

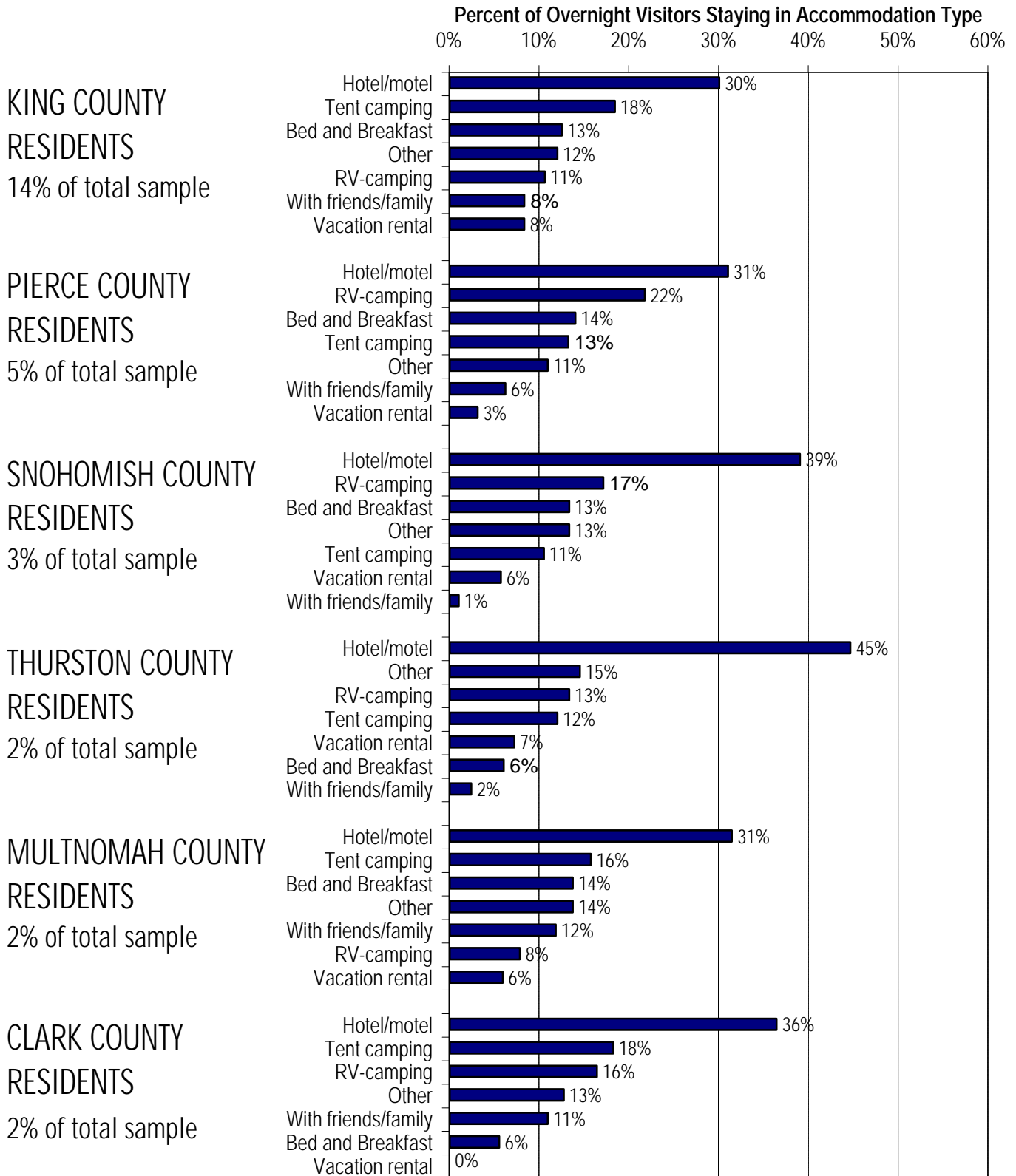
*by visitor origin*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## OVERNIGHT VISITOR ACCOMMODATIONS

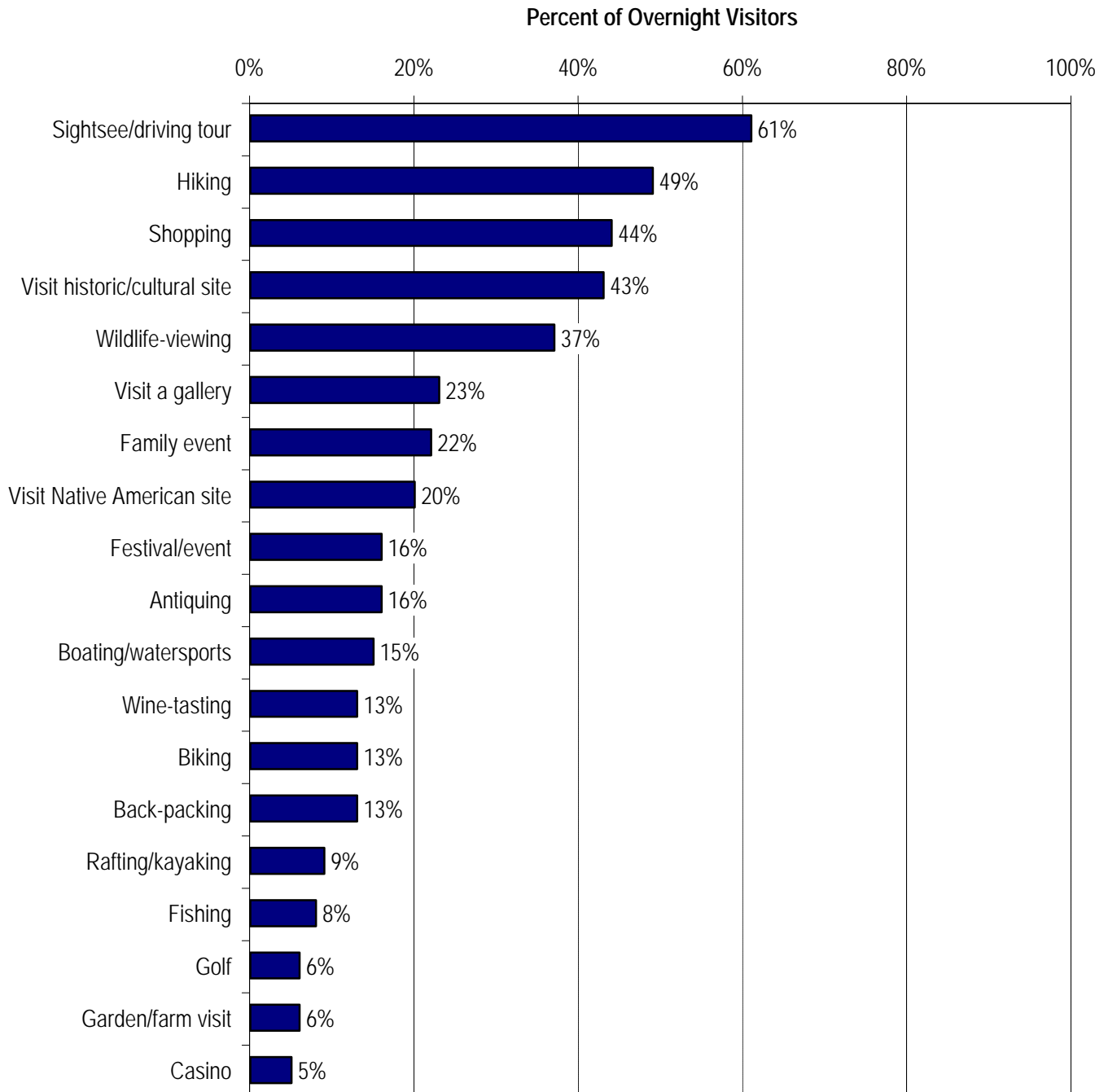
*by county of visitor residence*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

*King County Residents (14% of Total Sample)*

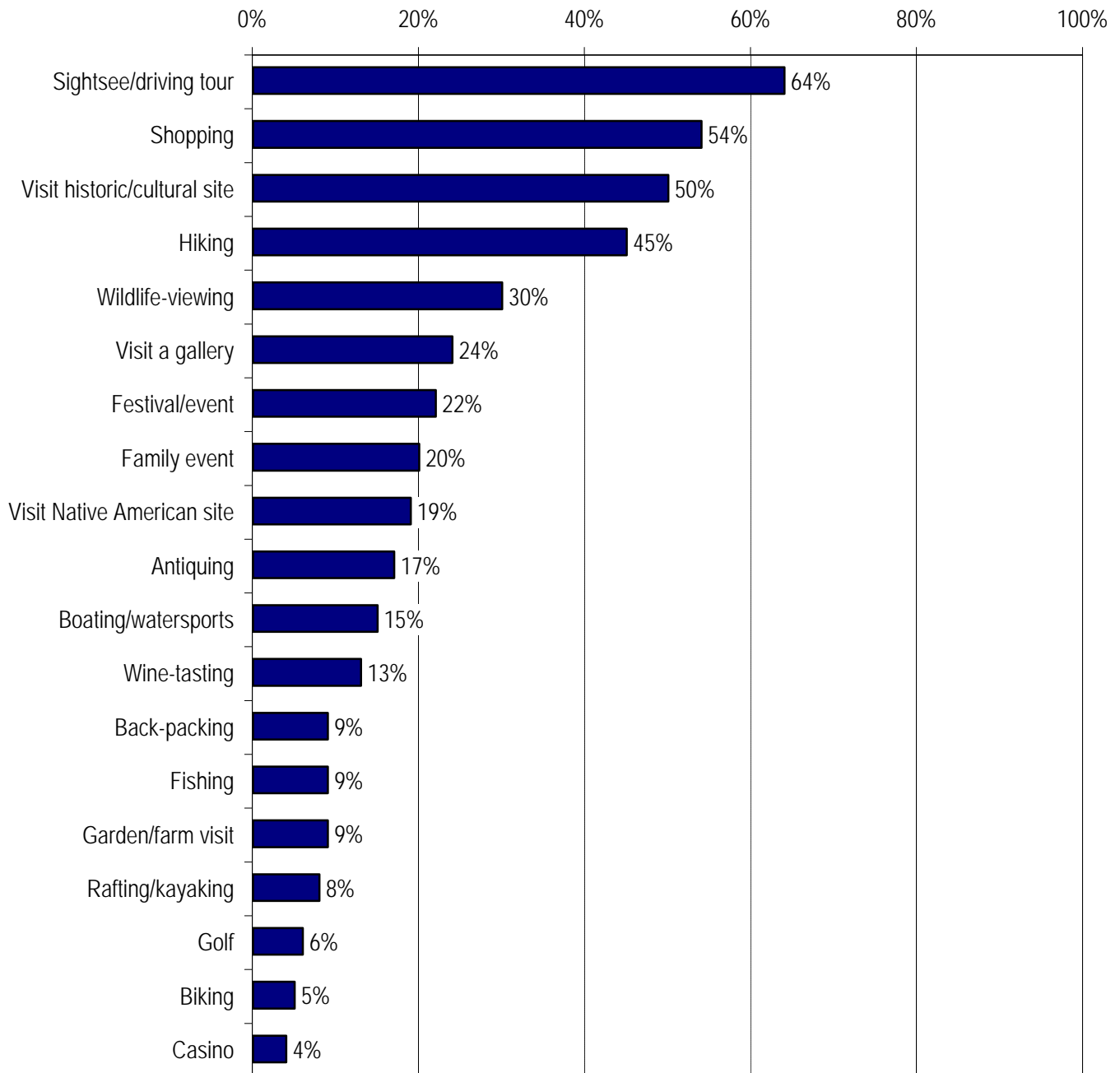


# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

*Pierce County Residents (5% of Total Sample)*

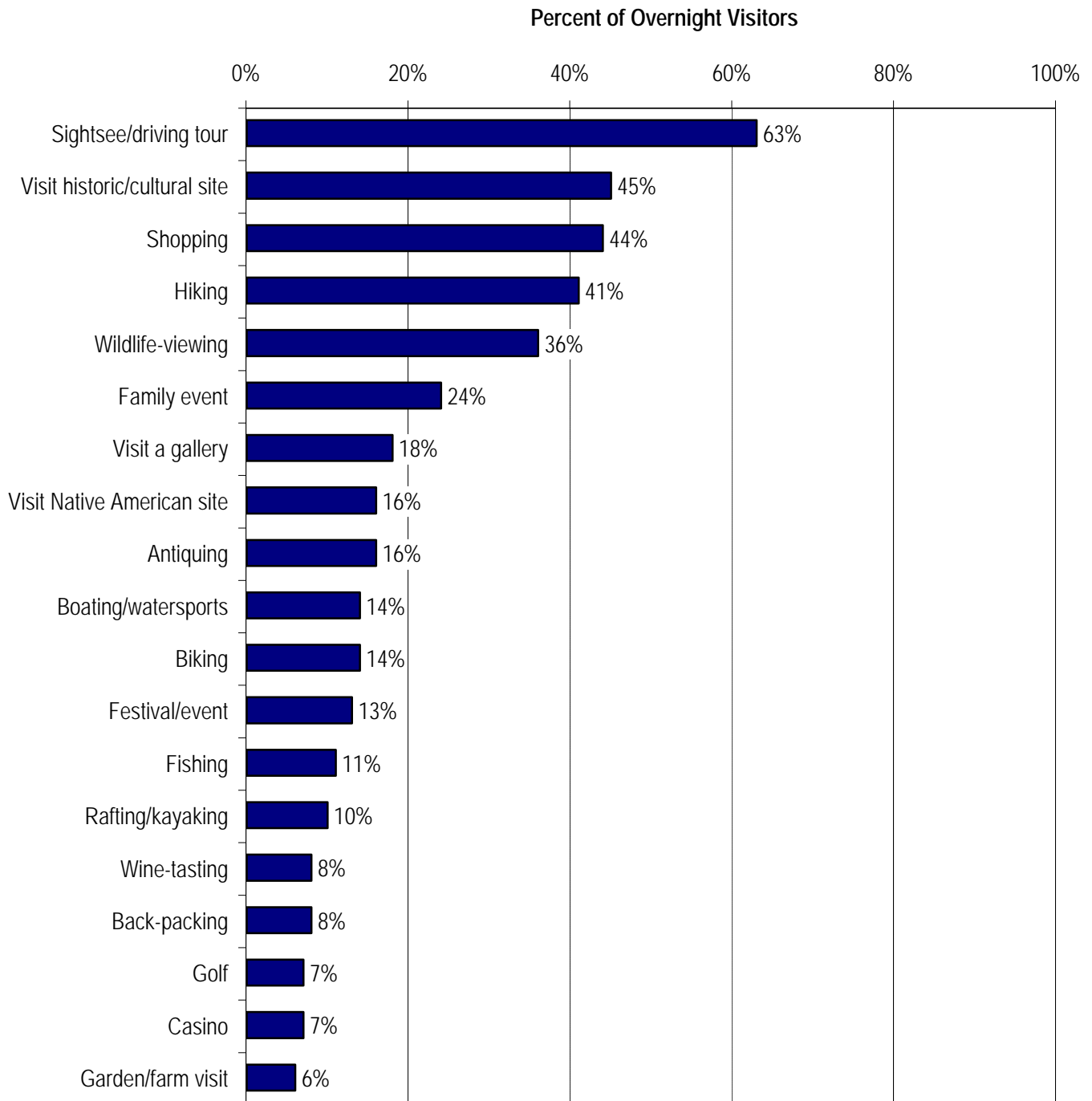
Percent of Overnight Visitors



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

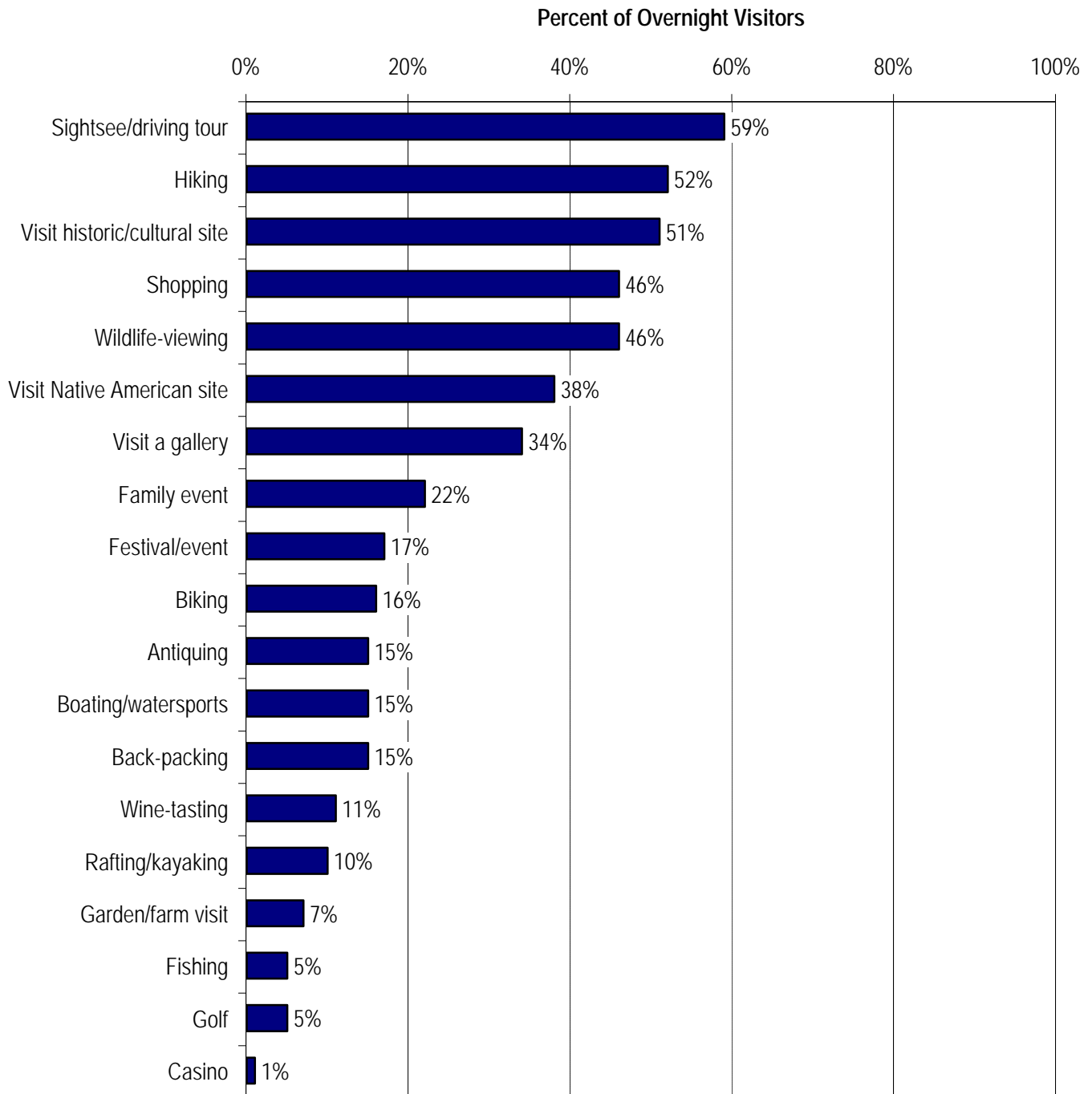
*Snohomish County Residents (3% of Total Sample)*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

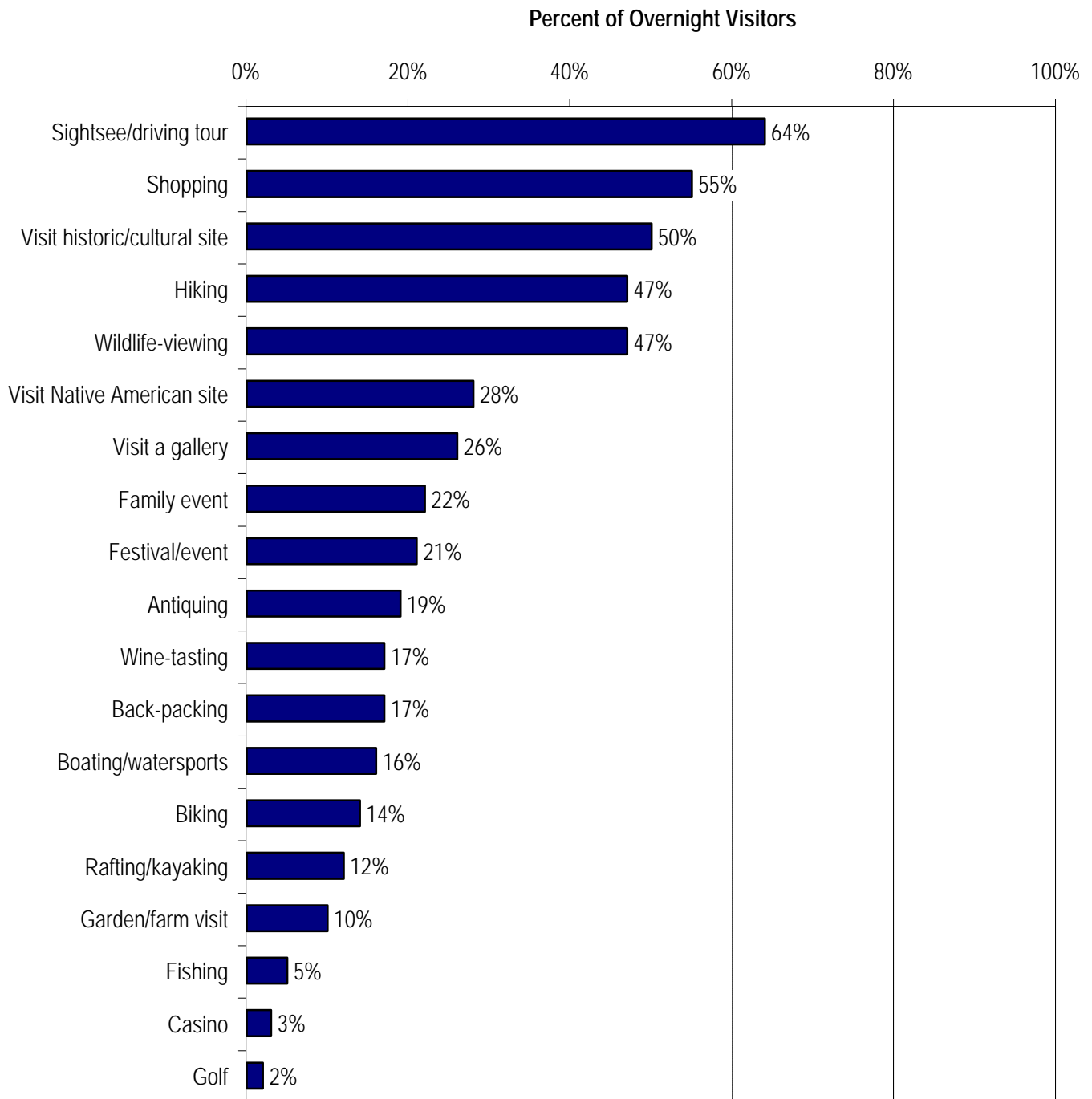
*Thurston County Residents (2% of Total Sample)*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

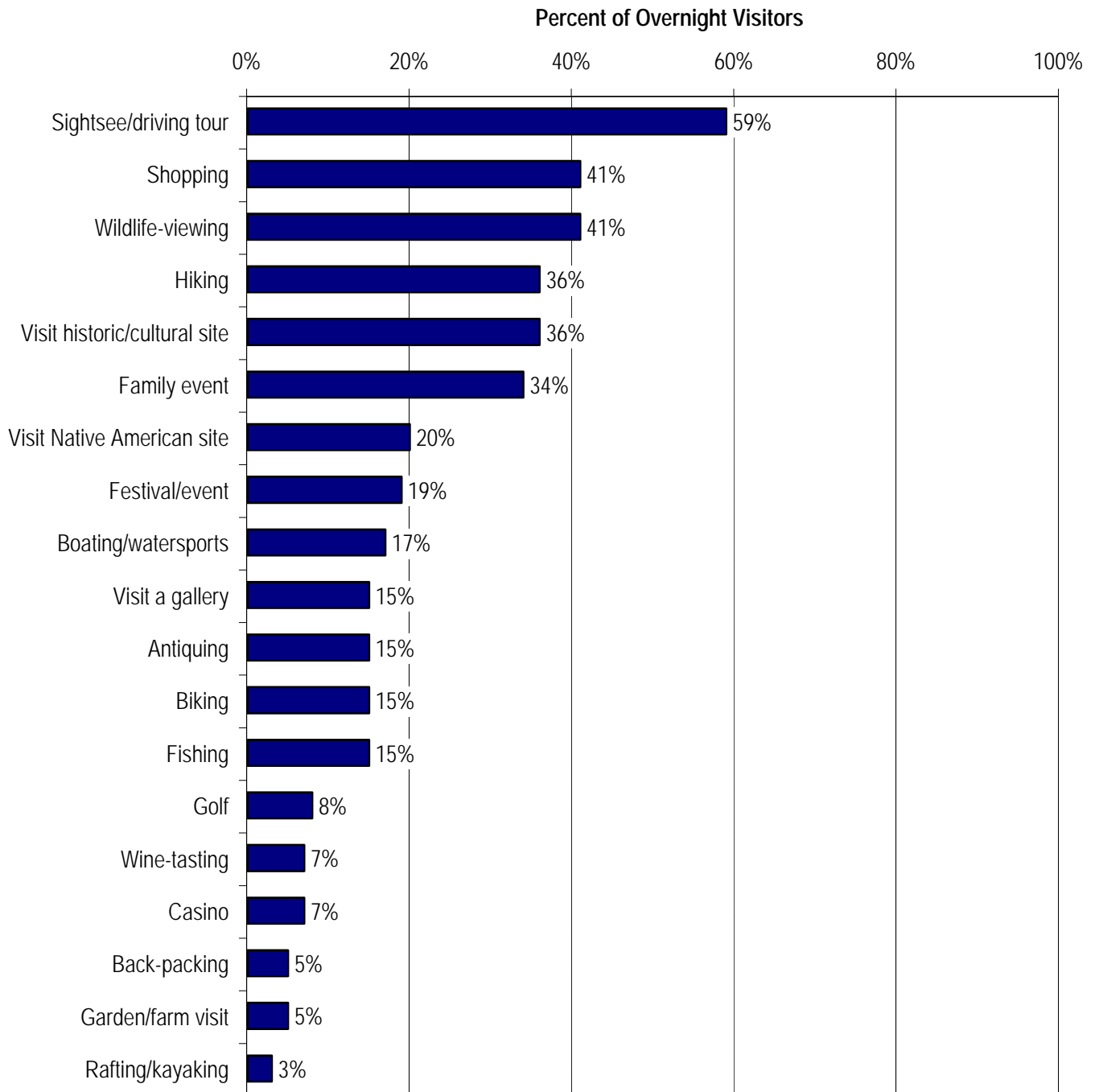
*Multnomah County Residents (2% of Total Sample)*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

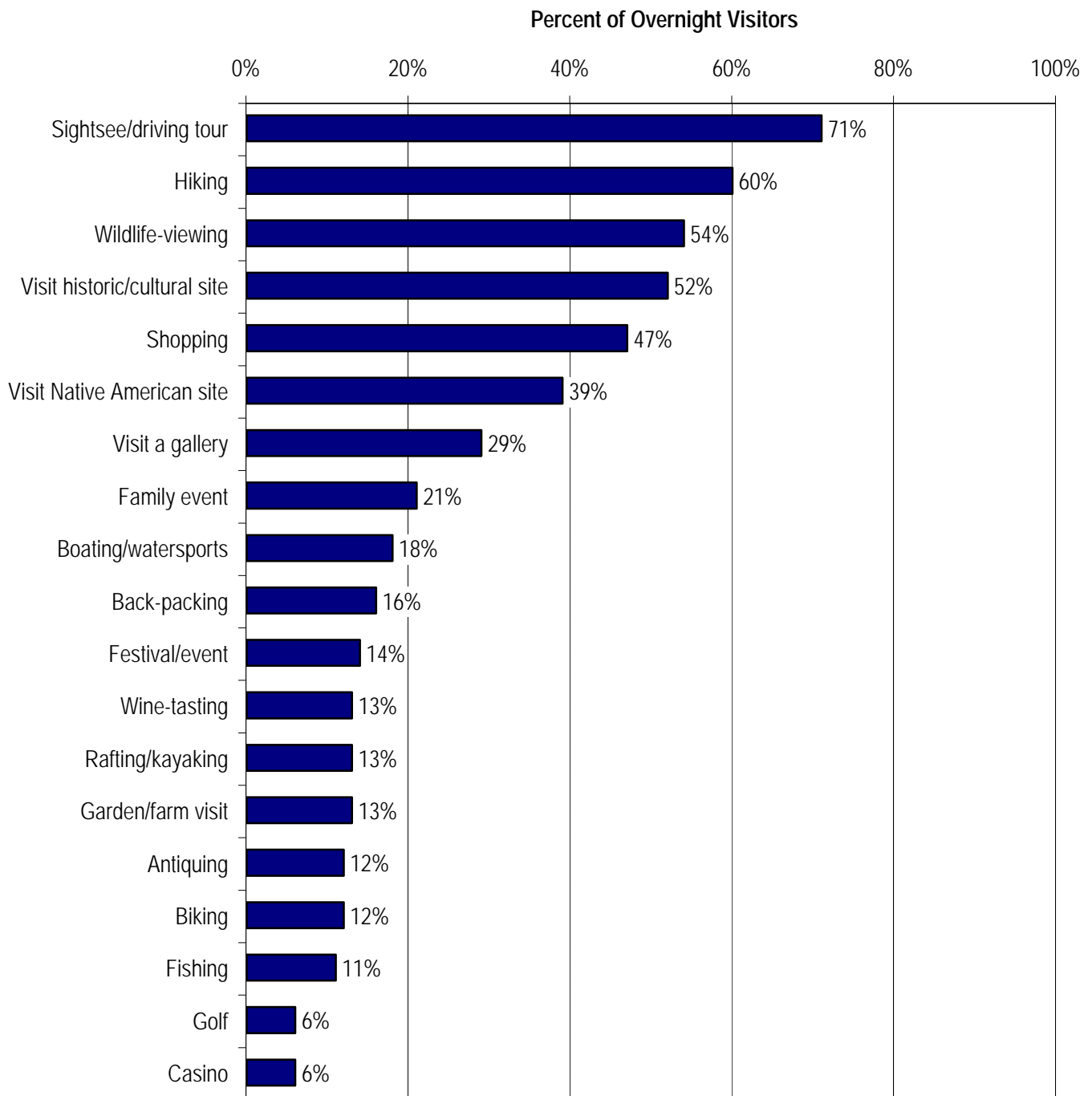
*Clark County Residents (2% of Total Sample)*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

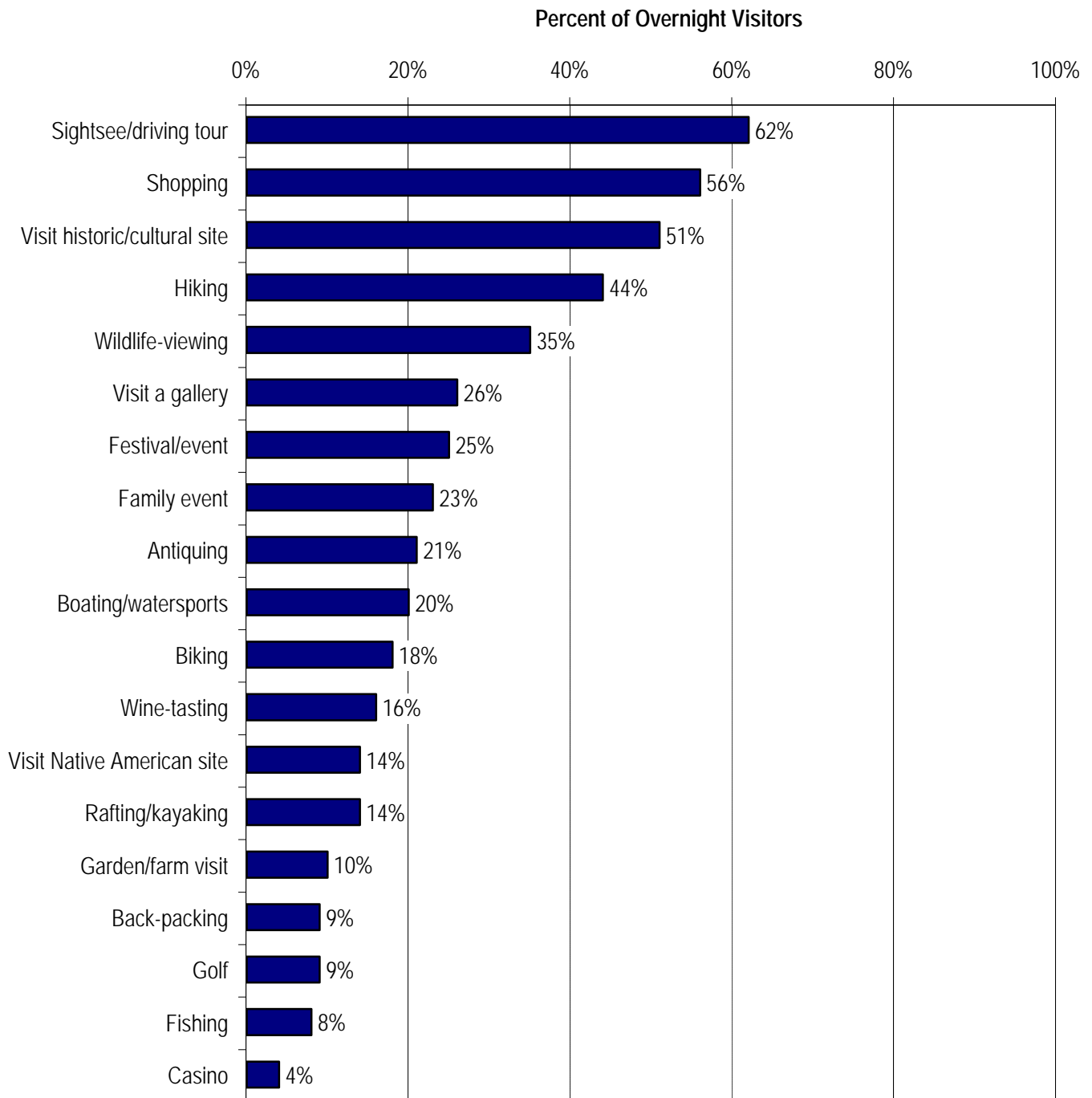
*Interview Location: Clallam County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

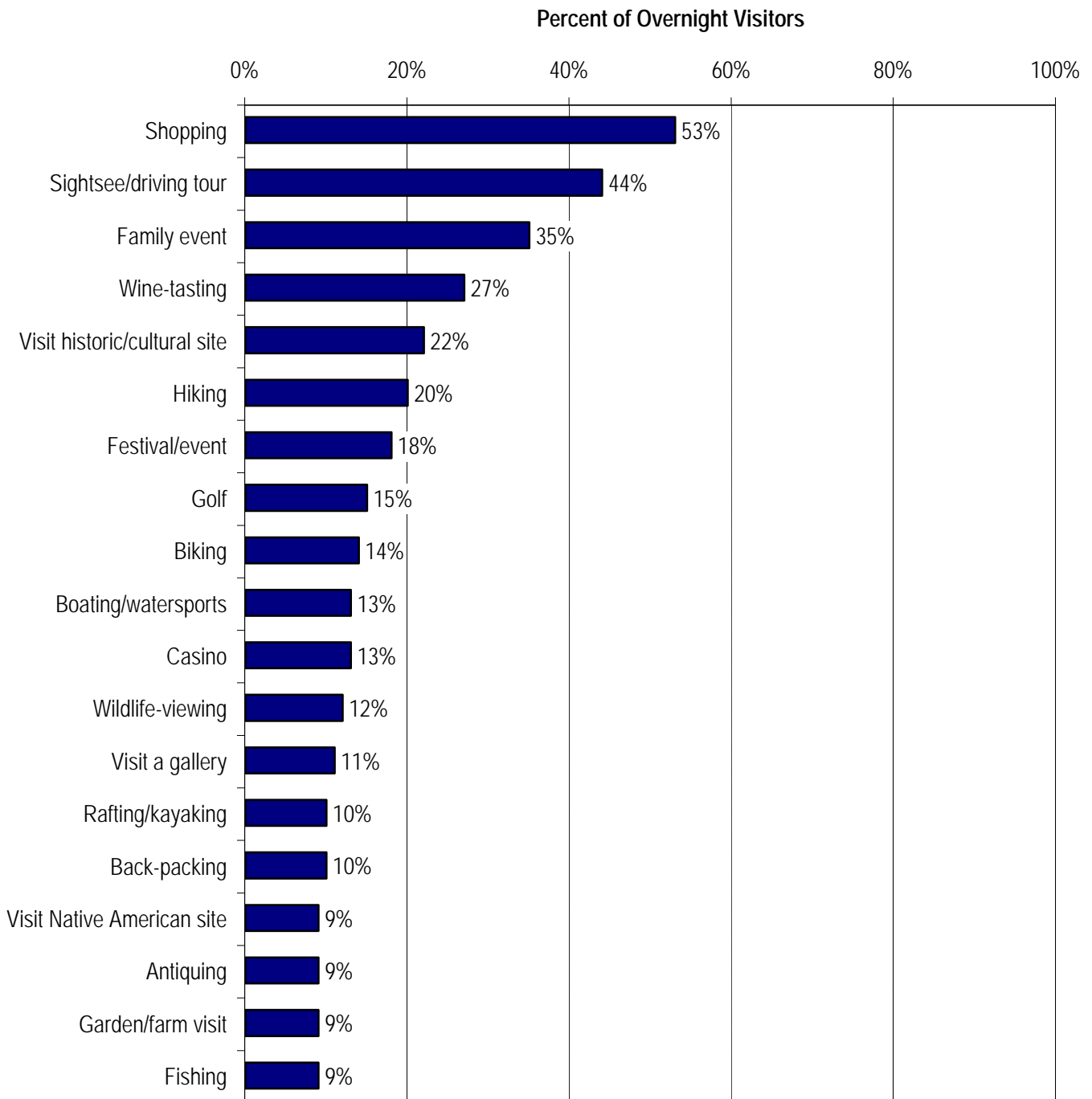
*Interview Location: Jefferson County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## ACTIVITIES THIS TRIP – OVERNIGHT VISITORS

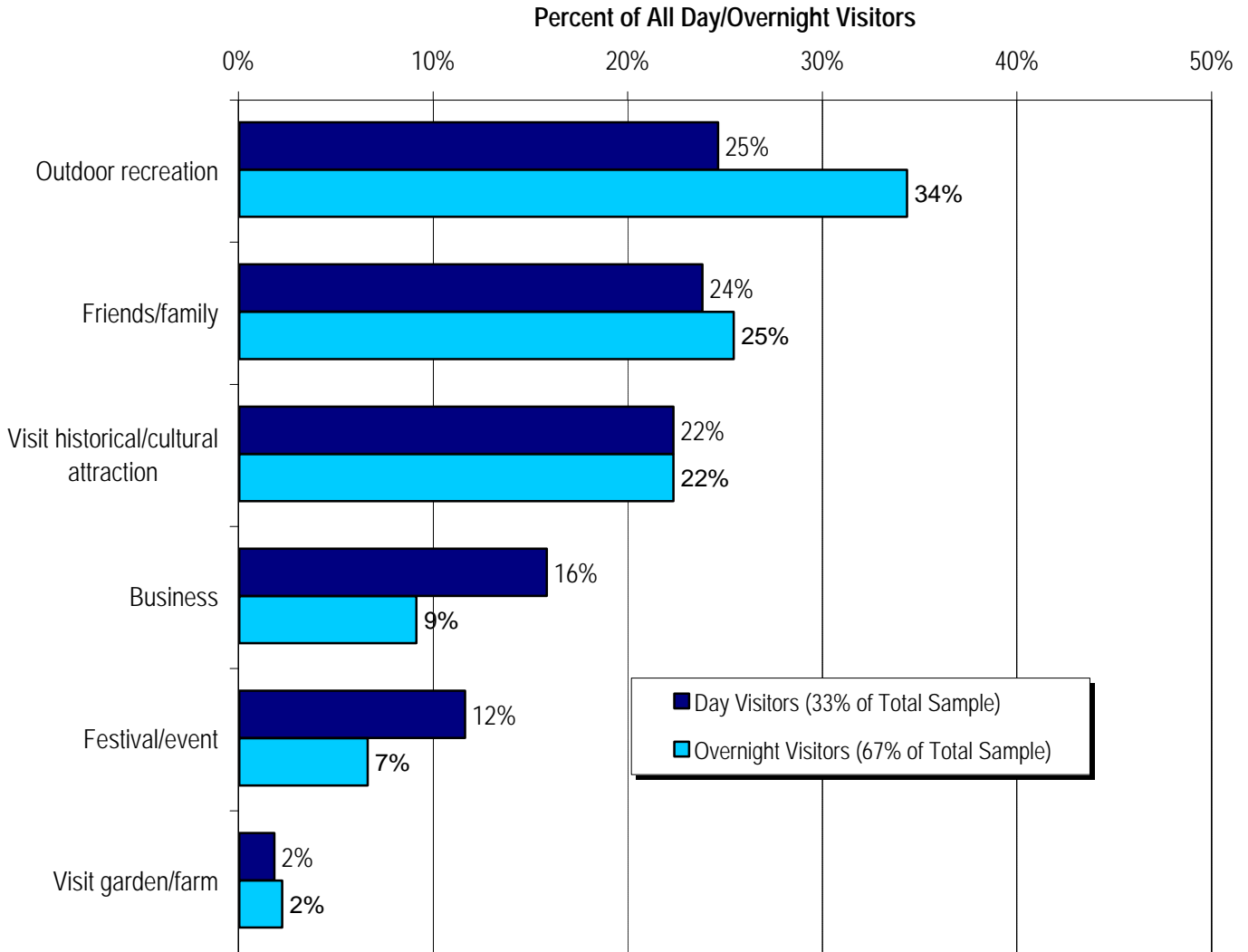
*Interview Location: Kitsap County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## PRIMARY REASON FOR VISIT

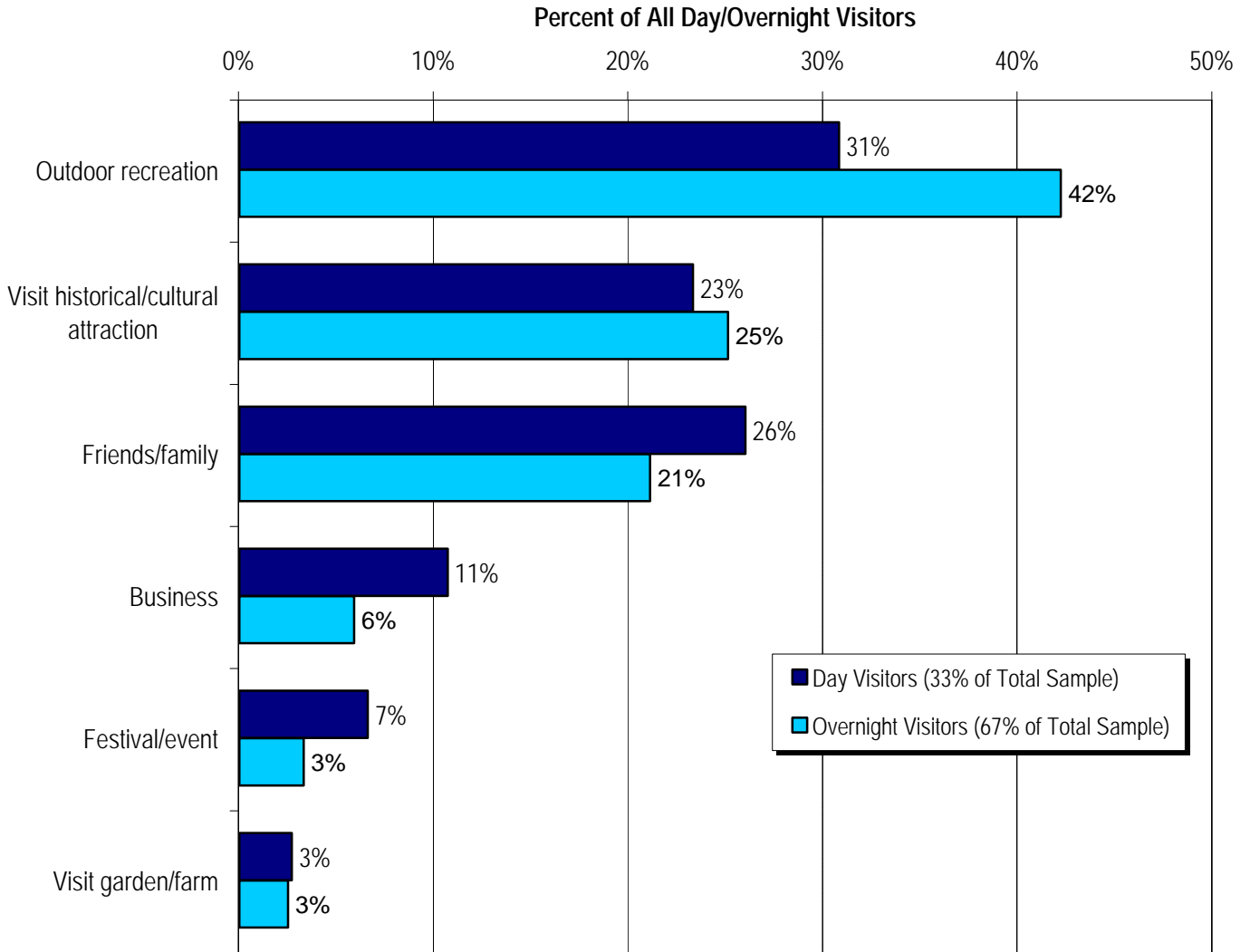
*by Day vs. Overnight Visitors – all interview locations combined*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## PRIMARY REASON FOR VISIT

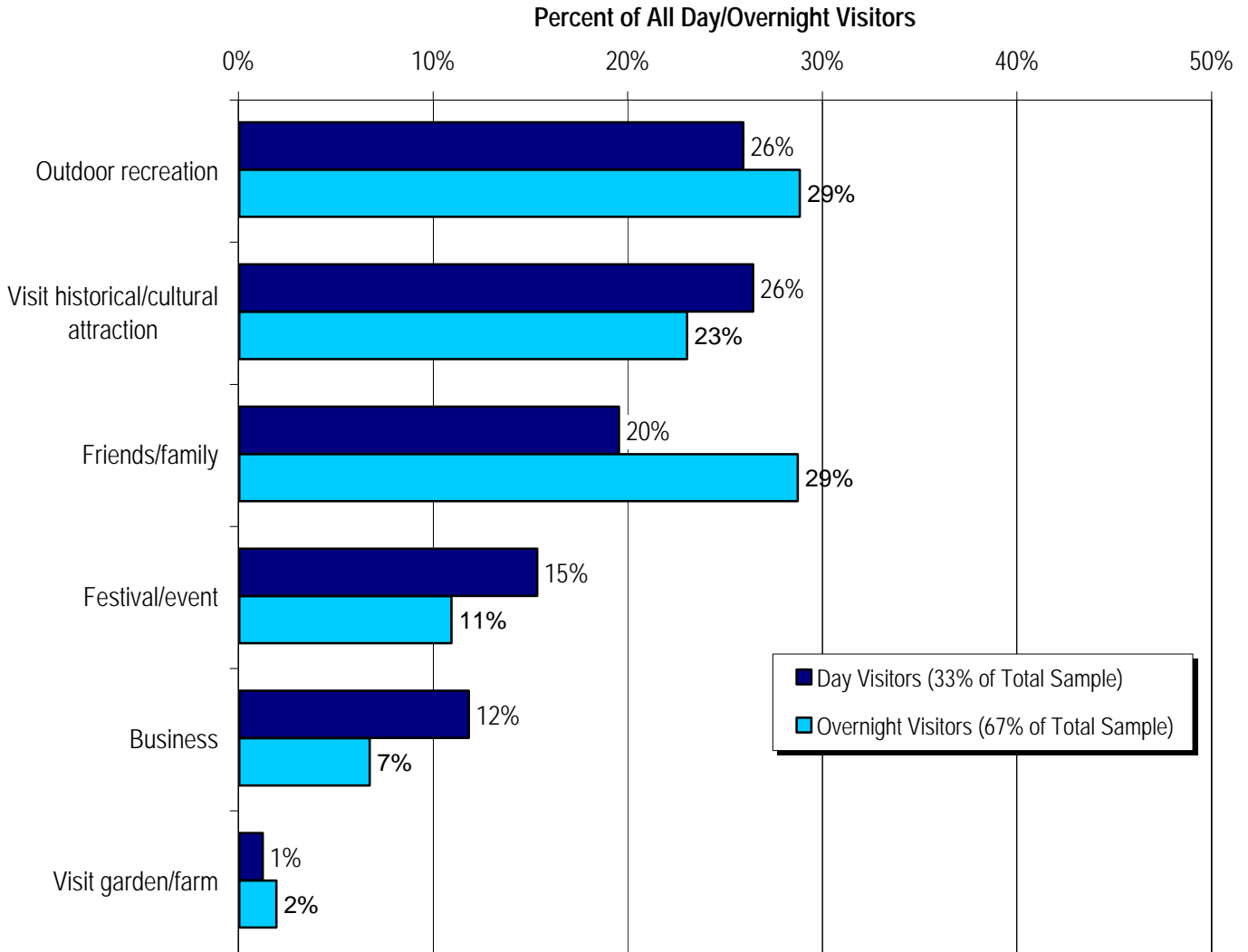
*by Day vs. Overnight Visitors – Interview Location: Clallam County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## PRIMARY REASON FOR VISIT

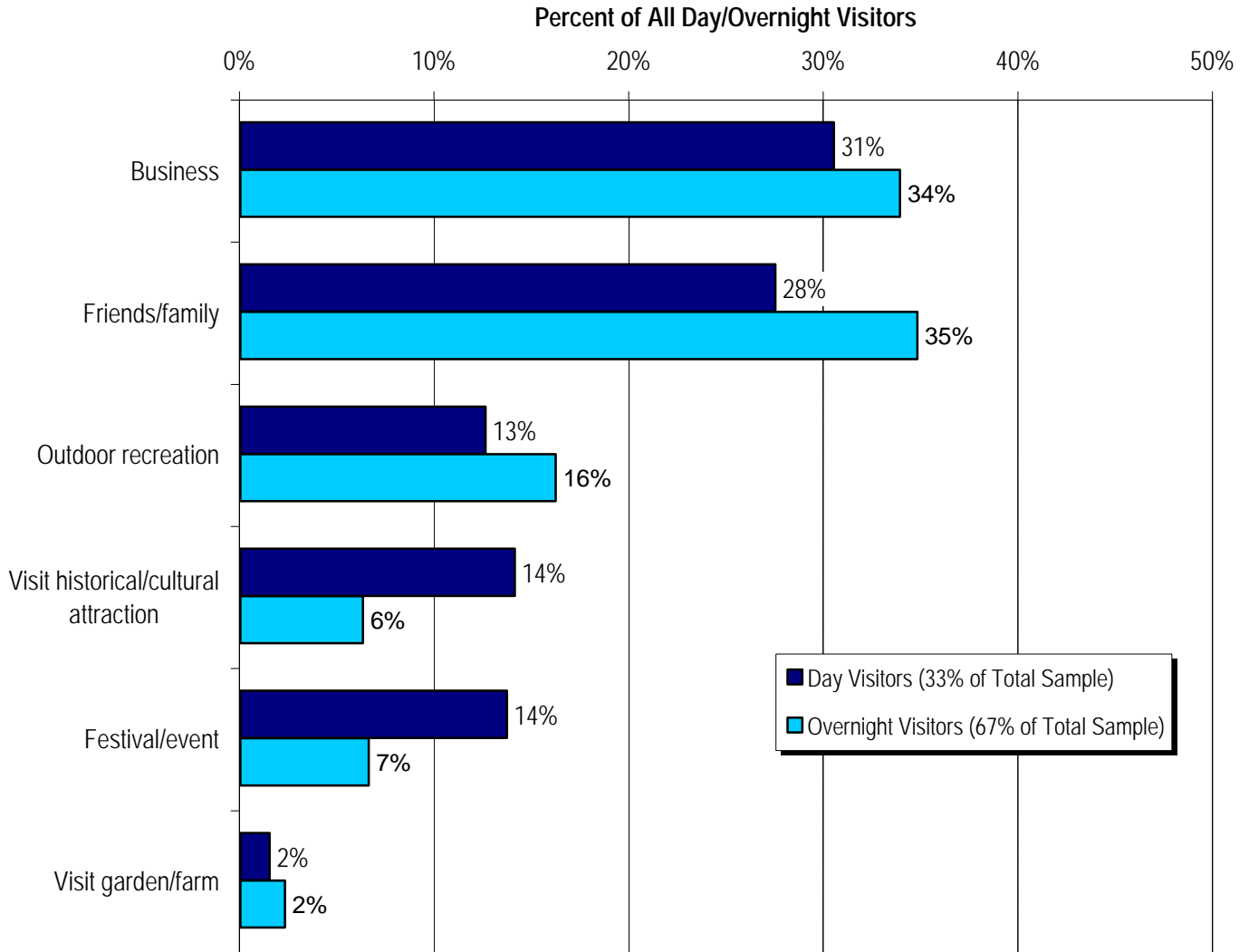
*by Day vs. Overnight Visitors – Interview Location: Jefferson County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## PRIMARY REASON FOR VISIT

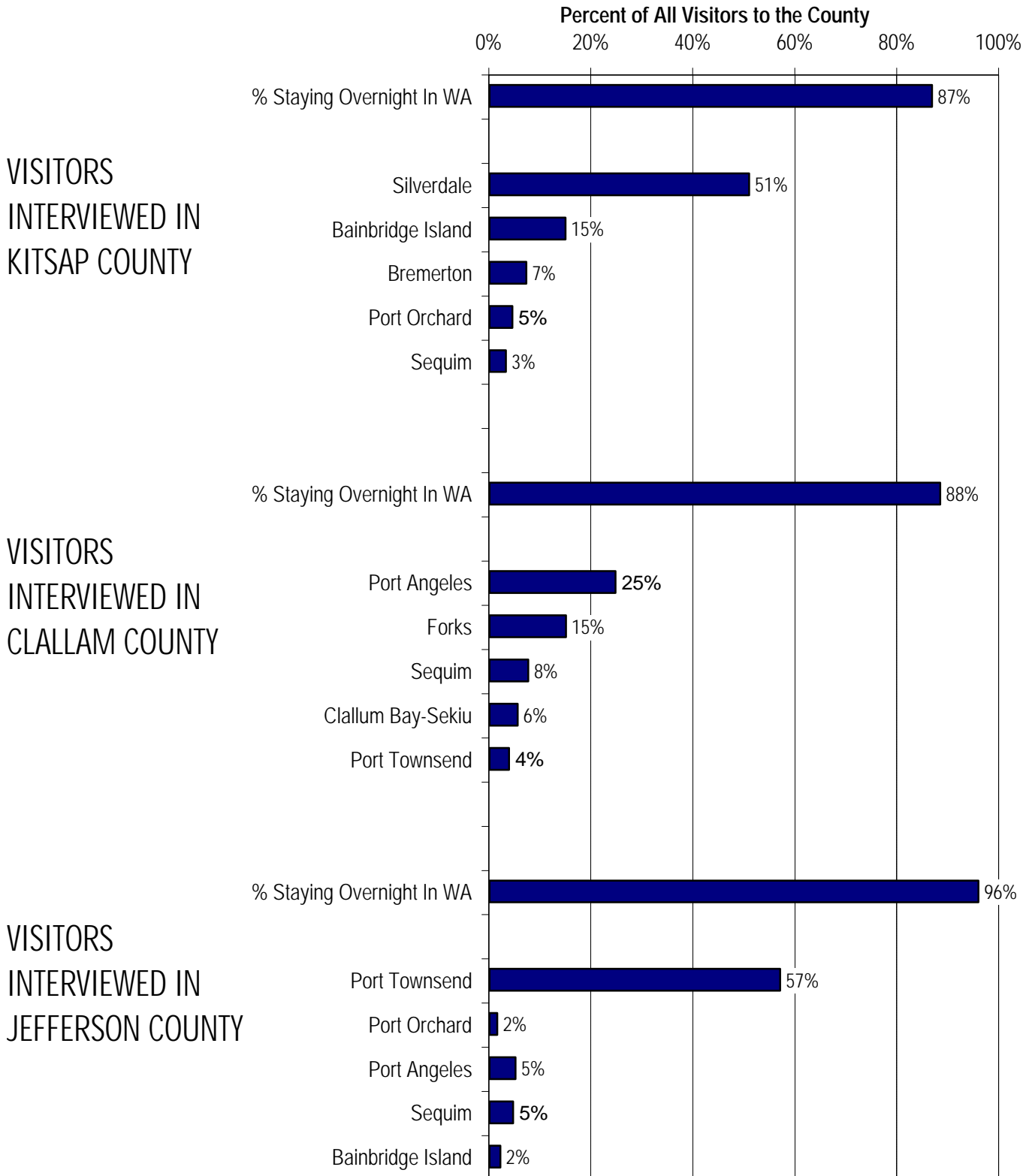
*by Day vs. Overnight Visitors – Interview Location: Kitsap County*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## OVERNIGHT VISITOR DESTINATION

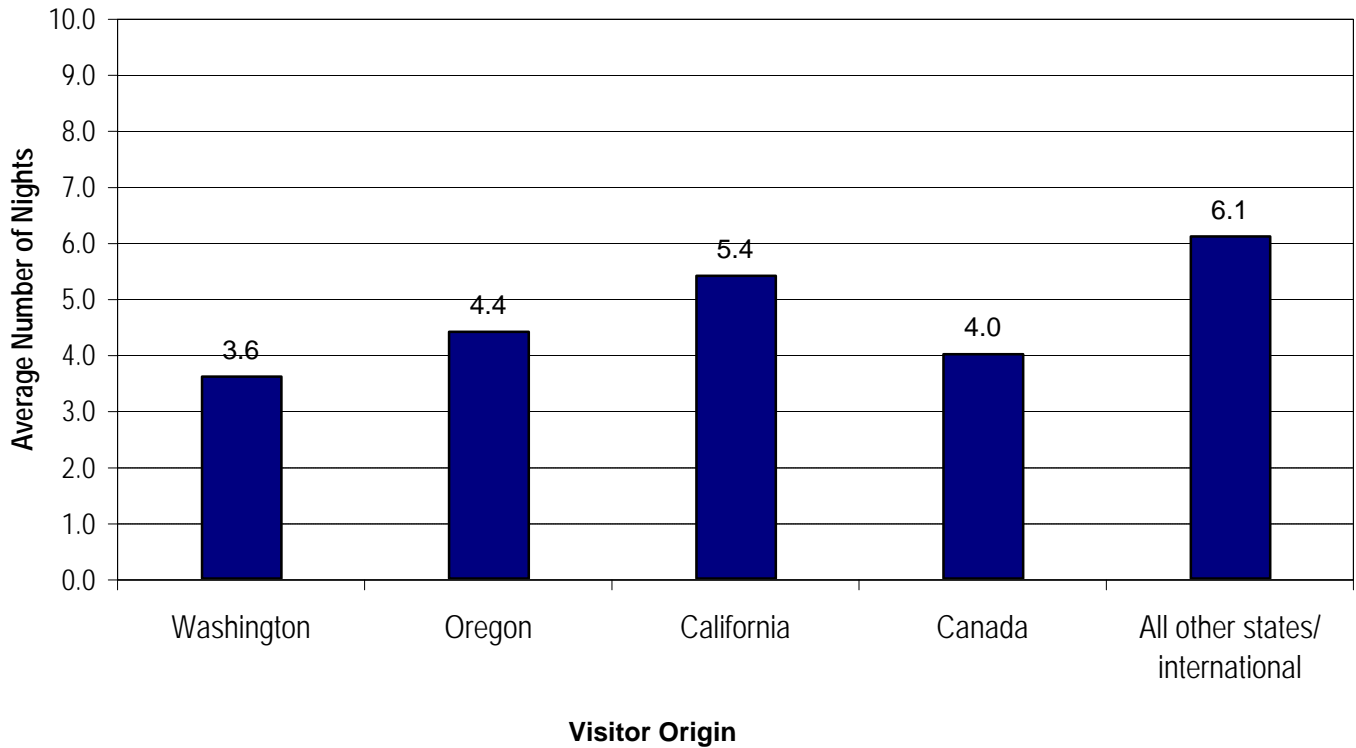
*top 5 responses by county where interviewed*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## NUMBER OF NIGHTS SPENT IN WASHINGTON STATE

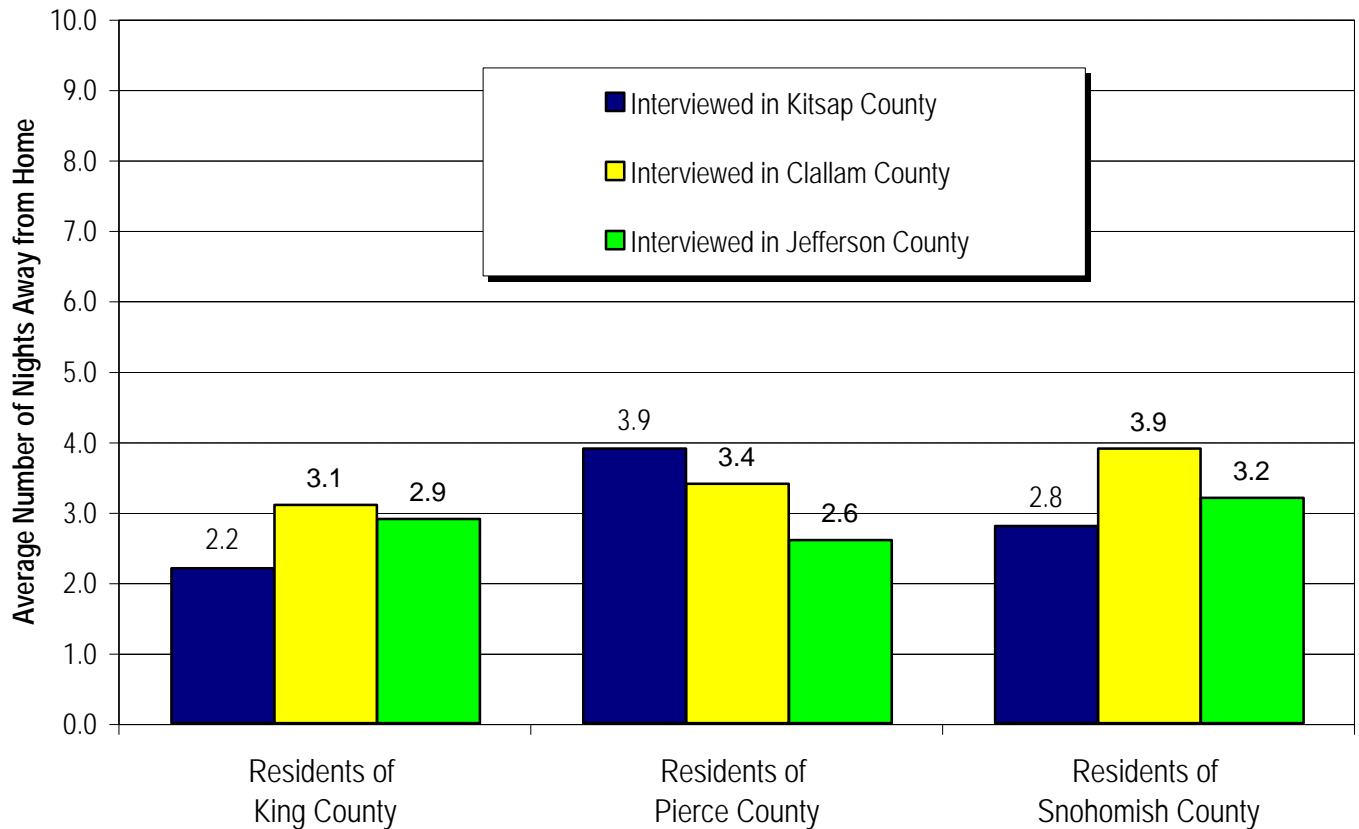
*by visitor origin*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## AVERAGE NUMBER OF NIGHTS AWAY FROM HOME

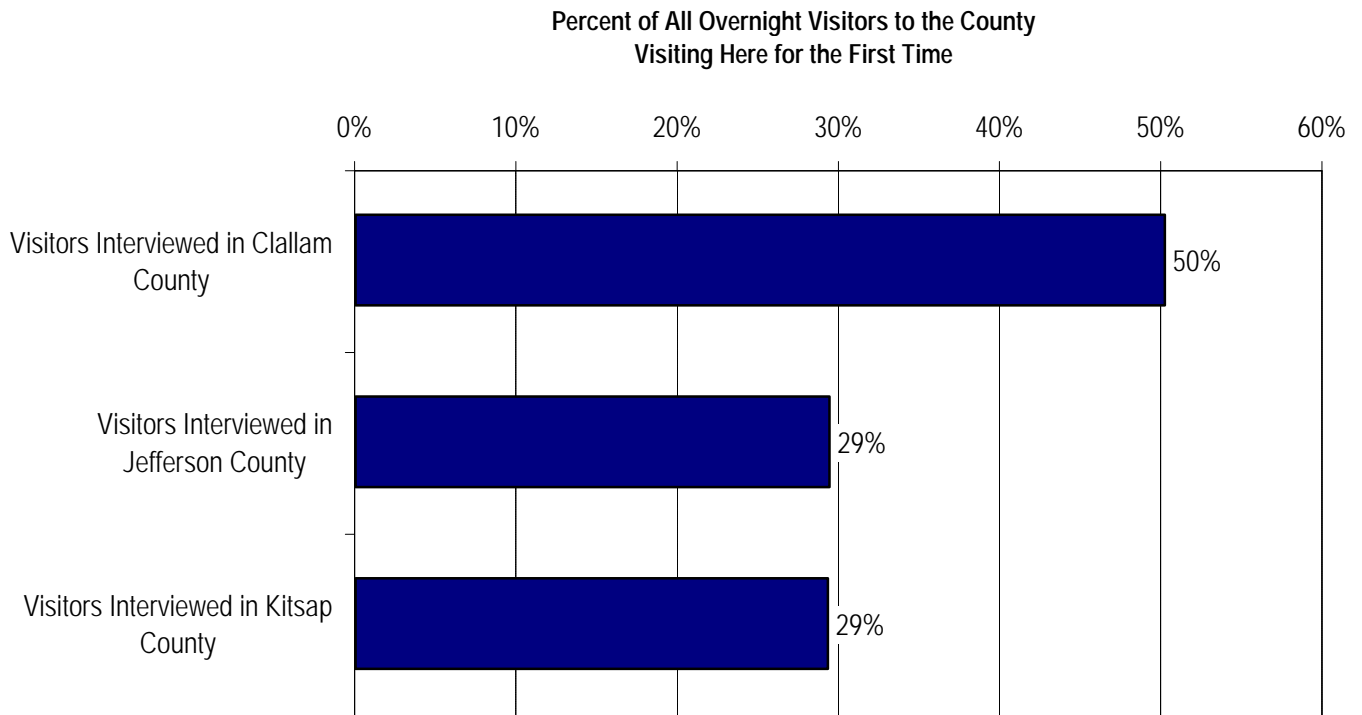
*for Washington Residents  
by county where interviewed*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## FIRST-TIME VISITORS – OVERNIGHT VISITORS

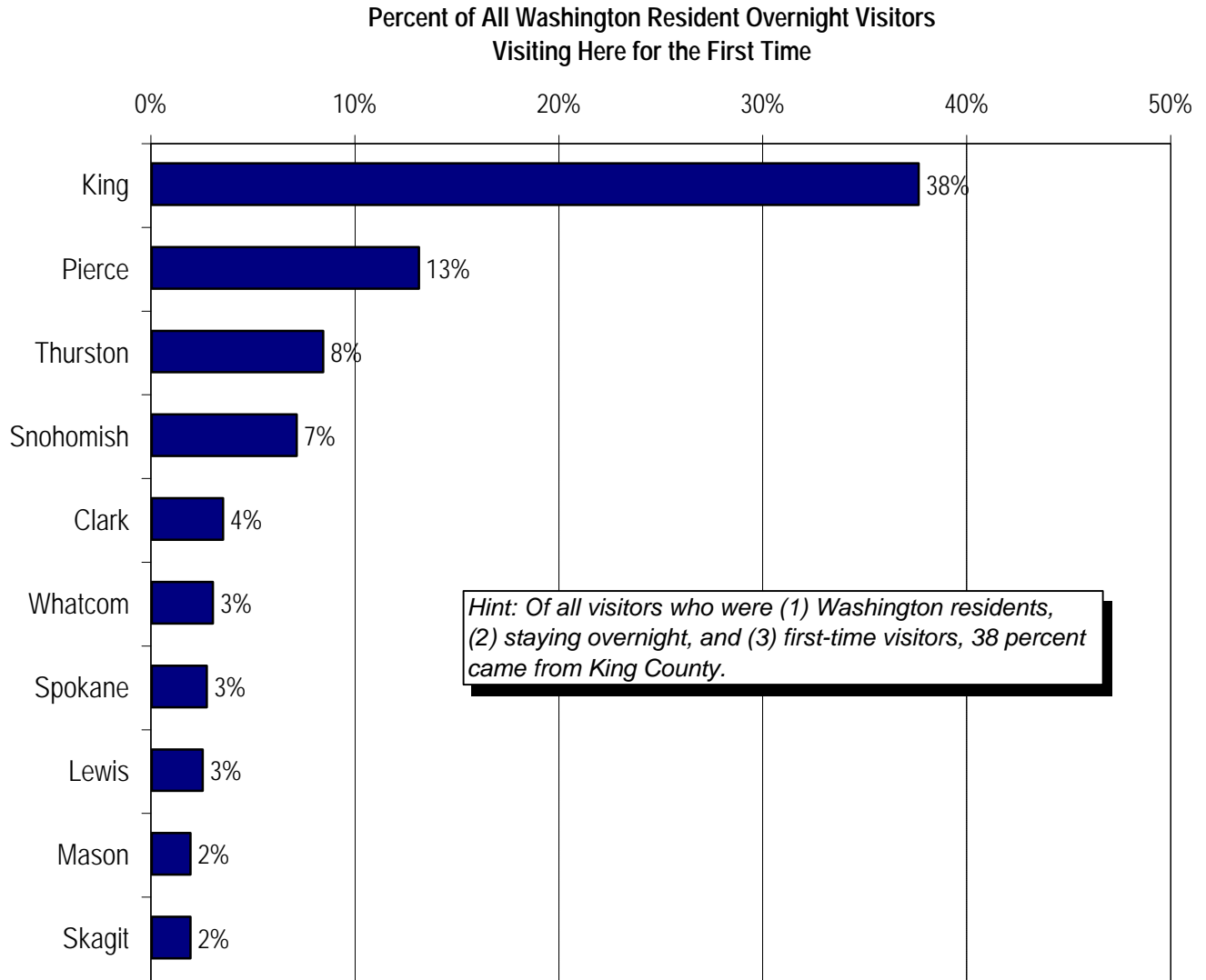
*by county where interviewed*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## FIRST-TIME VISITORS – OVERNIGHT VISITORS

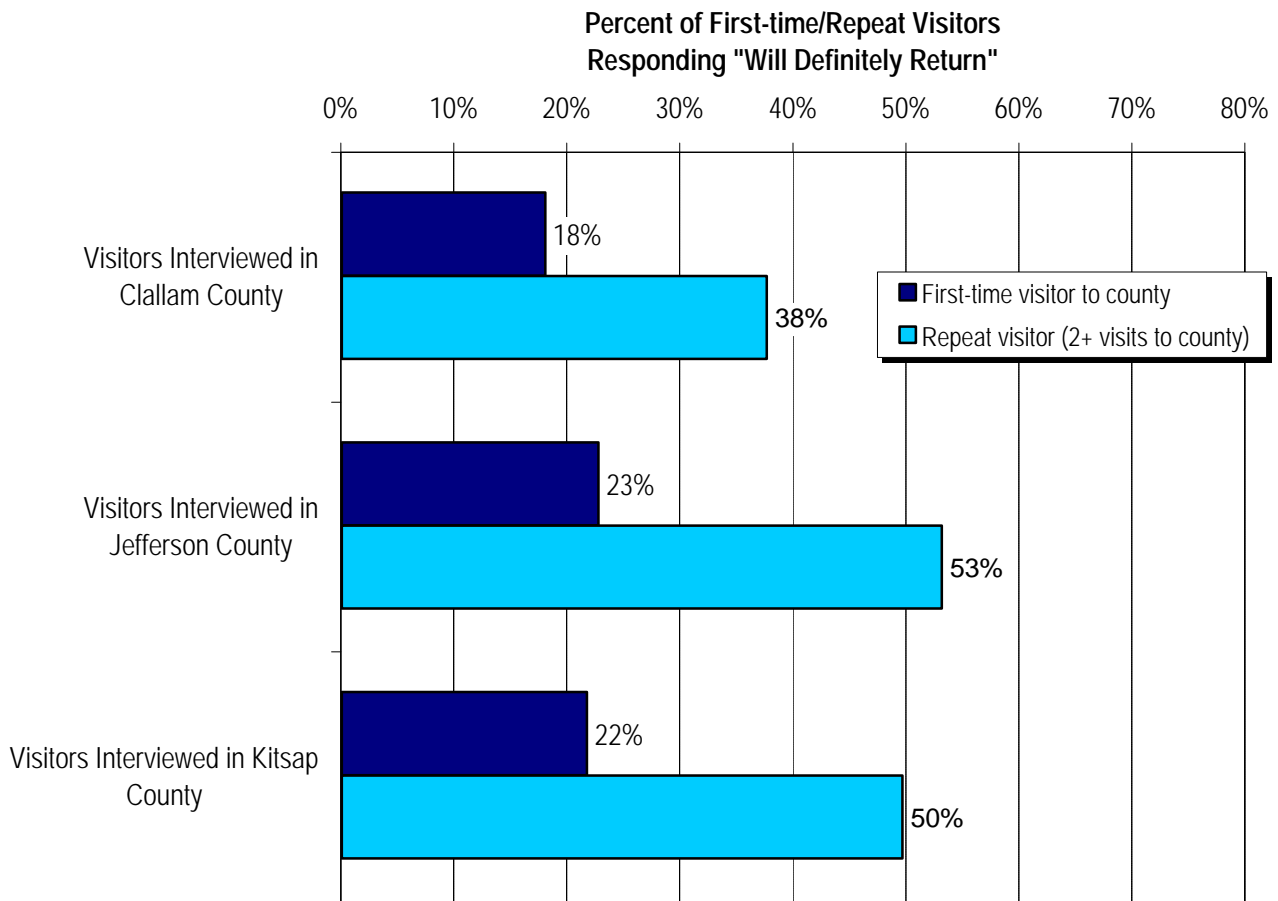
*by county of visitor origin*



# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## LIKELIHOOD OF RETURN\* – OVERNIGHT VISITORS

*repeat vs. first-time visitors*

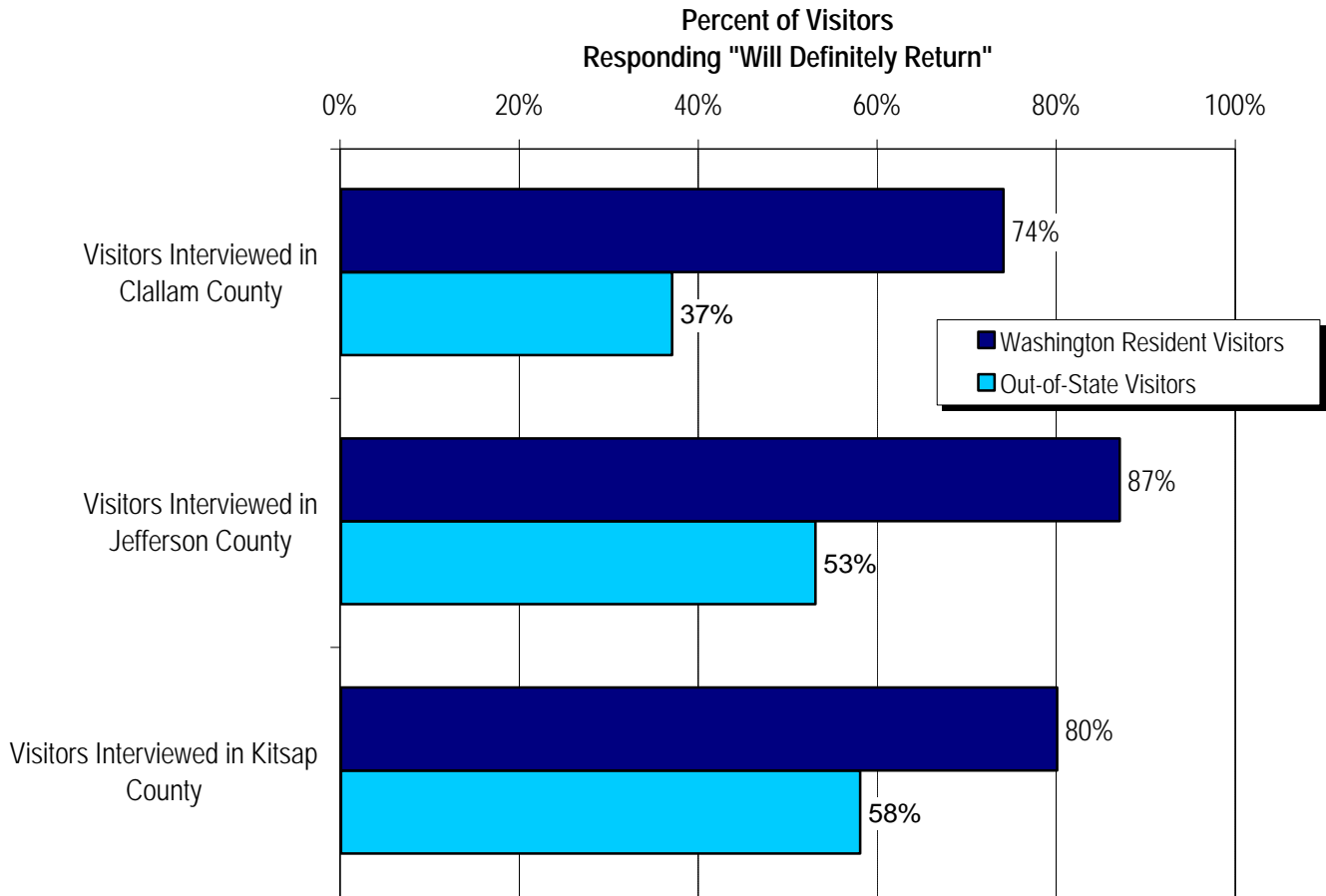


\* Likelihood of returning within a year

# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## LIKELIHOOD OF RETURN

*Washington Resident Visitors vs. Out-of-State Visitors*

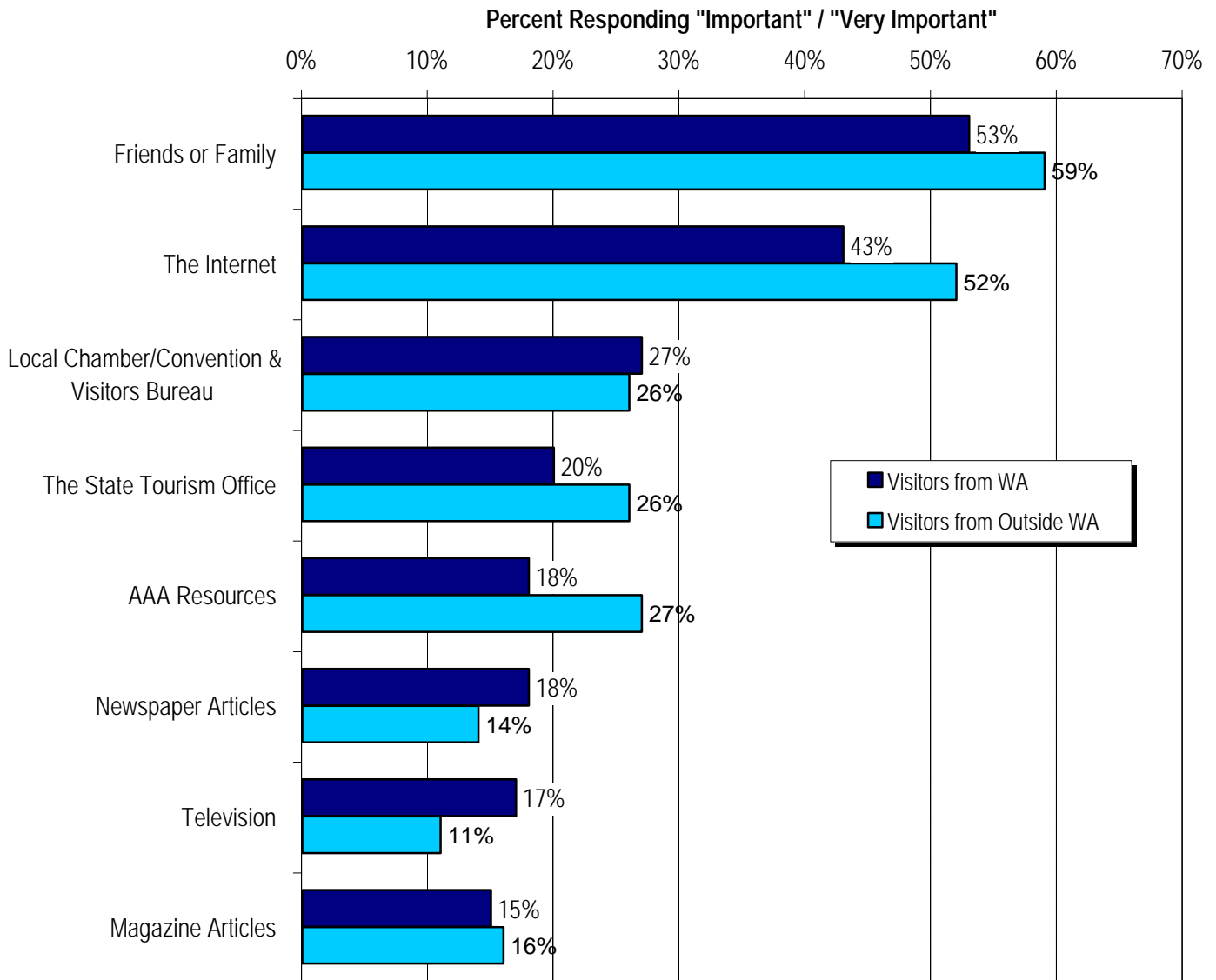


*\* Likelihood of returning within a year*

# Olympic & Kitsap Peninsulas 2002 Visitor Profile

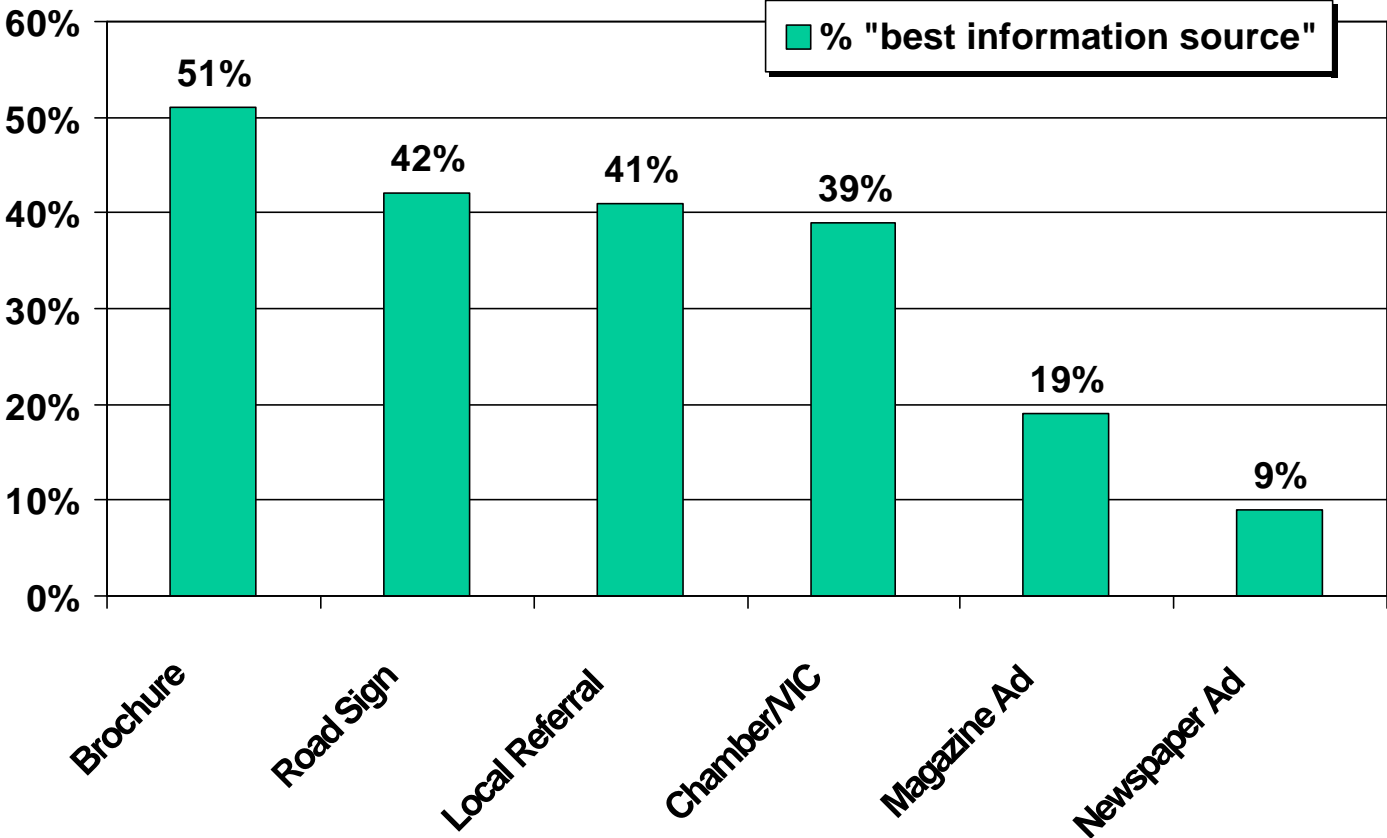
## IMPORTANCE OF INFORMATION SOURCES

*Washington Residents vs. Out of State Visitors*



# Itinerary Influence While Traveling

(all visitors)



## Comparison With Other Visitor Profiles

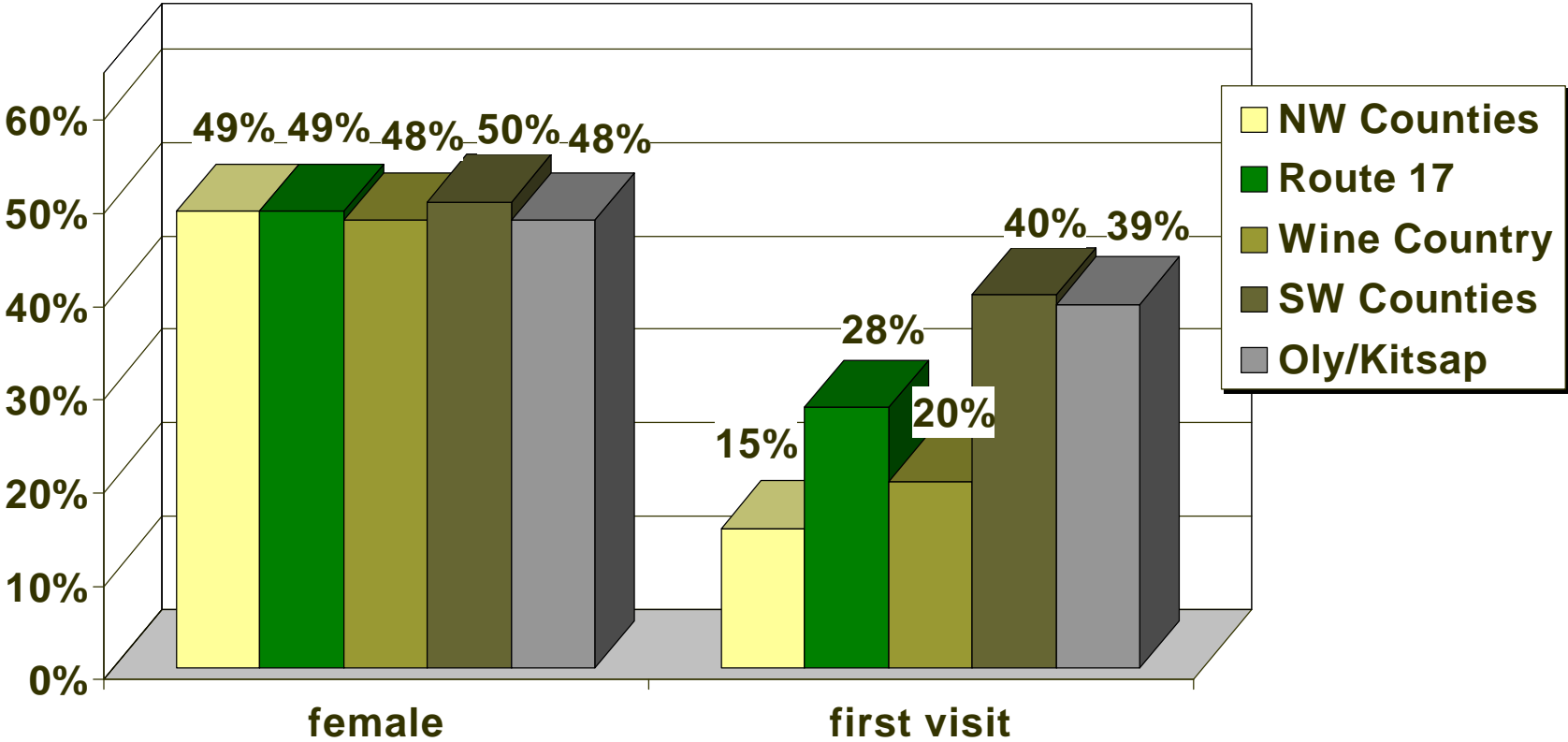
- ▶ Similar visitor profile studies have been conducted in other areas of Washington state.
- ▶ These other areas include:

<b>Northwest Counties</b>	<b>Route 17</b>	<b>Wine Country</b>	<b>Southwest Counties</b>
Island	Grant	Benton	Clark
San Juan		Franklin	Cowlitz
Skagit		Walla Walla	Grays Harbor
Snohomish		Yakima	Lewis
Whatcom			Pacific

- ▶ These survey results are available on:  
[www.experiencewashington.com/industry](http://www.experiencewashington.com/industry)      Look for “research.”

# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## Comparison With Other Visitor Profiles – Gender & First-Time Visitation (all visitors)



## Olympic & Kitsap Peninsulas 2002 Visitor Profile

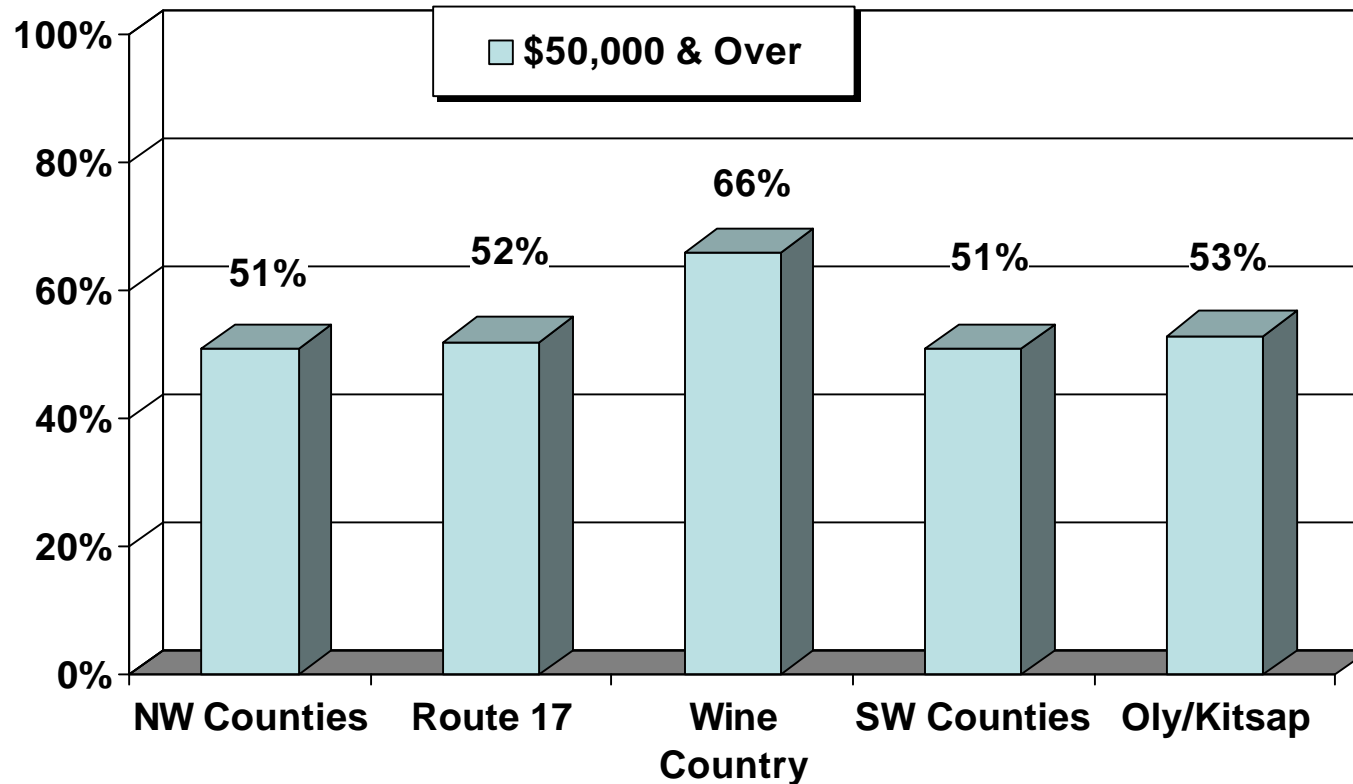
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### Comparison With Other Visitor Profiles – Average Age (all visitors)

<b>WASHINGTON DESTINATION AREA</b>	<b>Average Age of Visitors</b>
<b>NW Counties</b>	<b>38 years</b>
<b>Route 17</b>	<b>40 years</b>
<b>Wine Country</b>	<b>44 years</b>
<b>SW Counties</b>	<b>39 years</b>
<b>Olympic/Kitsap</b>	<b>41 years</b>

## Olympic & Kitsap Peninsulas 2002 Visitor Profile

### Comparison With Other Visitor Profiles – Household Income (all visitors)



## Olympic & Kitsap Peninsulas 2002 Visitor Profile

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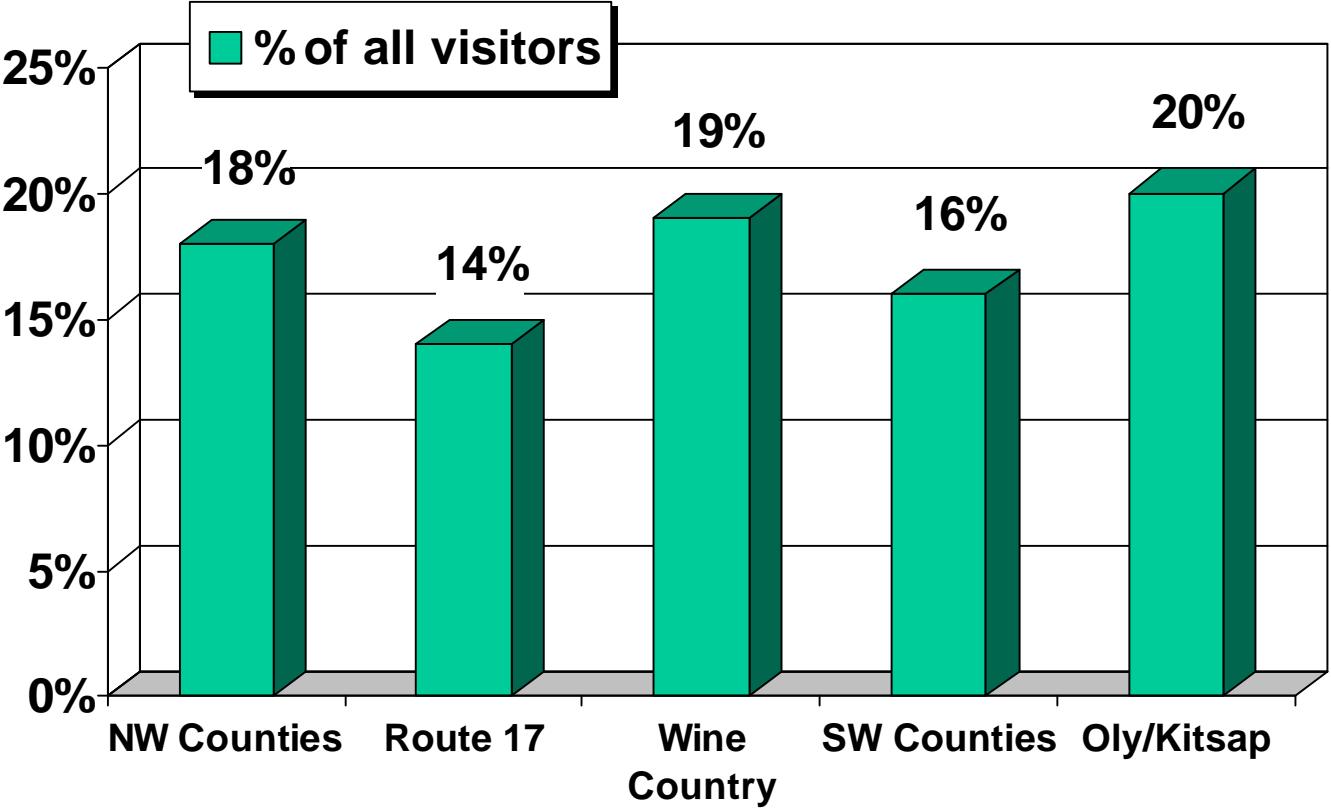
### Comparison With Other Visitor Profiles – Overnight Visitors

(as a percentage of all visits within the area)

<b>WASHINGTON DESTINATION AREA</b>	<b>Overnight Visits as % of Overall Visits</b>
<b>NW Counties</b>	<b>54%</b>
<b>Route 17</b>	<b>77%</b>
<b>Wine Country</b>	<b>50%</b>
<b>SW Counties</b>	<b>39%</b>
<b>Olympic/Kitsap</b>	<b>49%</b>

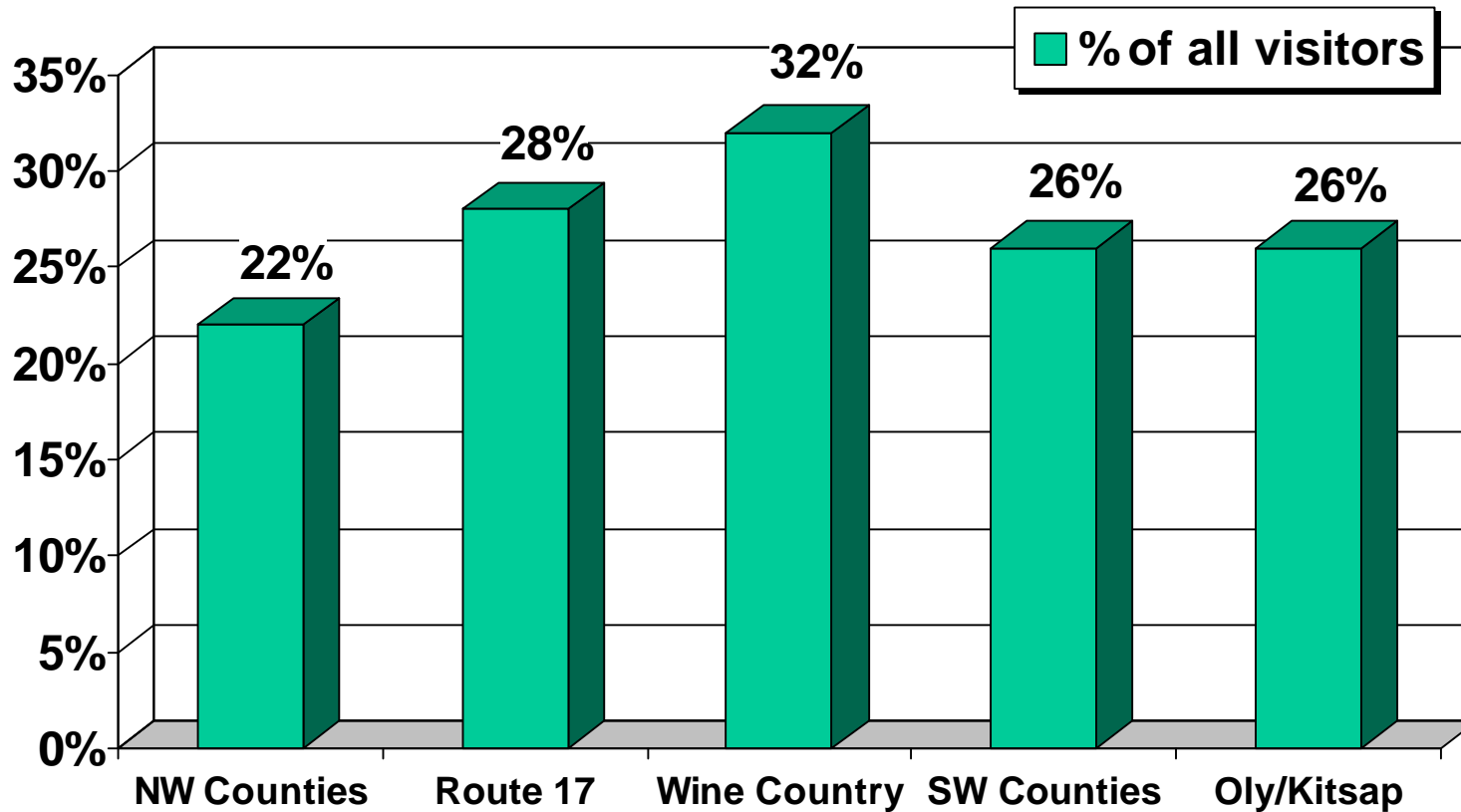
# Olympic & Kitsap Peninsulas 2002 Visitor Profile

Comparison With Other Visitor Profiles –  
Childless Couples (all visitors)



## Olympic & Kitsap Peninsulas 2002 Visitor Profile

Comparison With Other Visitor Profiles –  
Empty Nesters (children no longer living at home)



## Olympic & Kitsap Peninsulas 2002 Visitor Profile

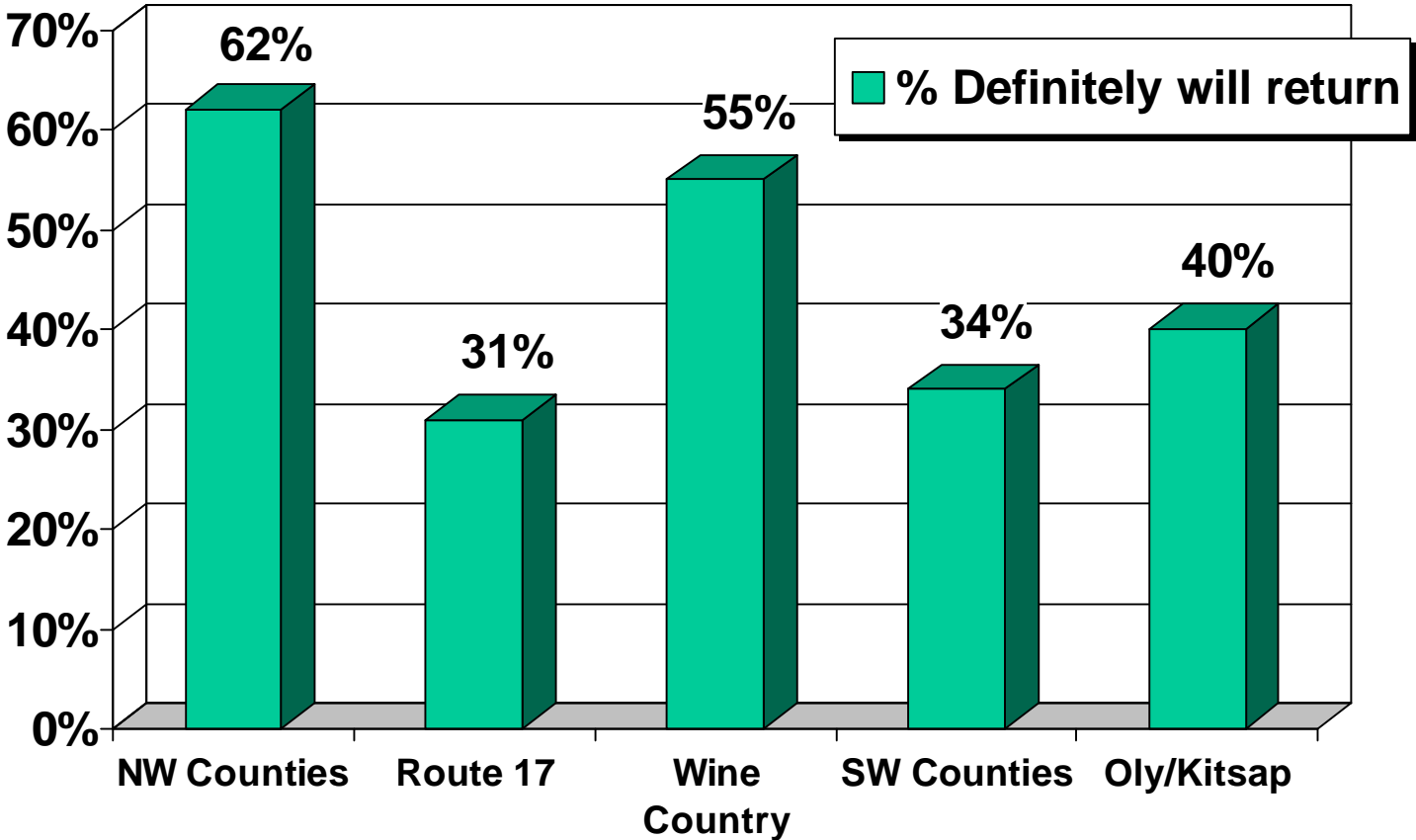
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### Geographics Comparisons of Washington Residents (all visitors)

<b>WASHINGTON DESTINATION AREA</b>	<b>% Visitors From WA State Residents</b>	<b>% Visitors From King County Residents</b>
<b>NW Counties</b>	<b>62%</b>	<b>19%</b>
<b>Route 17</b>	<b>54%</b>	<b>18%</b>
<b>Wine Country</b>	<b>66%</b>	<b>30%</b>
<b>SW Counties</b>	<b>42%</b>	<b>10%</b>
<b>Olympic/Kitsap</b>	<b>48%</b>	<b>14%</b>

# Olympic & Kitsap Peninsulas 2002 Visitor Profile

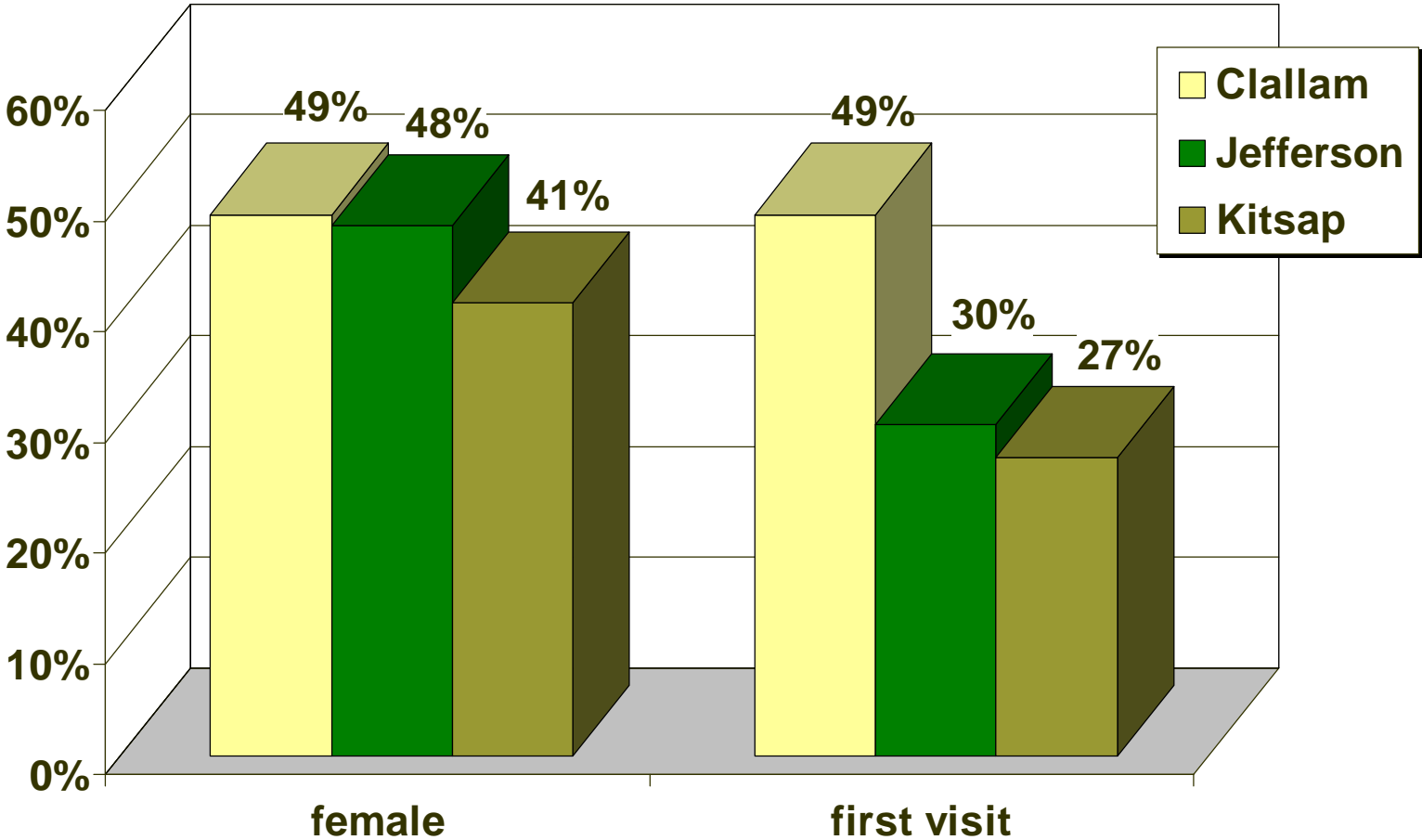
## Comparison With Other Visitor Profiles – Likelihood of Return Visit\* (all visitors)



\* Likelihood of returning within a year

# Olympic & Kitsap Peninsulas 2002 Visitor Profile

## Comparison With Other Counties – Gender & First-Time Visitation (all visitors)



## Olympic & Kitsap Peninsulas 2002 Visitor Profile

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### Comparison Within Olympic/Kitsap Peninsulas – Average Age (all visitors)

<b>WASHINGTON DESTINATION AREA</b>	<b>Average Age of Visitors</b>
<b>Clallam</b>	<b>38 years</b>
<b>Jefferson</b>	<b>45 years</b>
<b>Kitsap</b>	<b>40 years</b>

## Olympic & Kitsap Peninsulas 2002 Visitor Profile

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### Comparison Within Olympic/Kitsap Peninsulas – Overnight Visitors

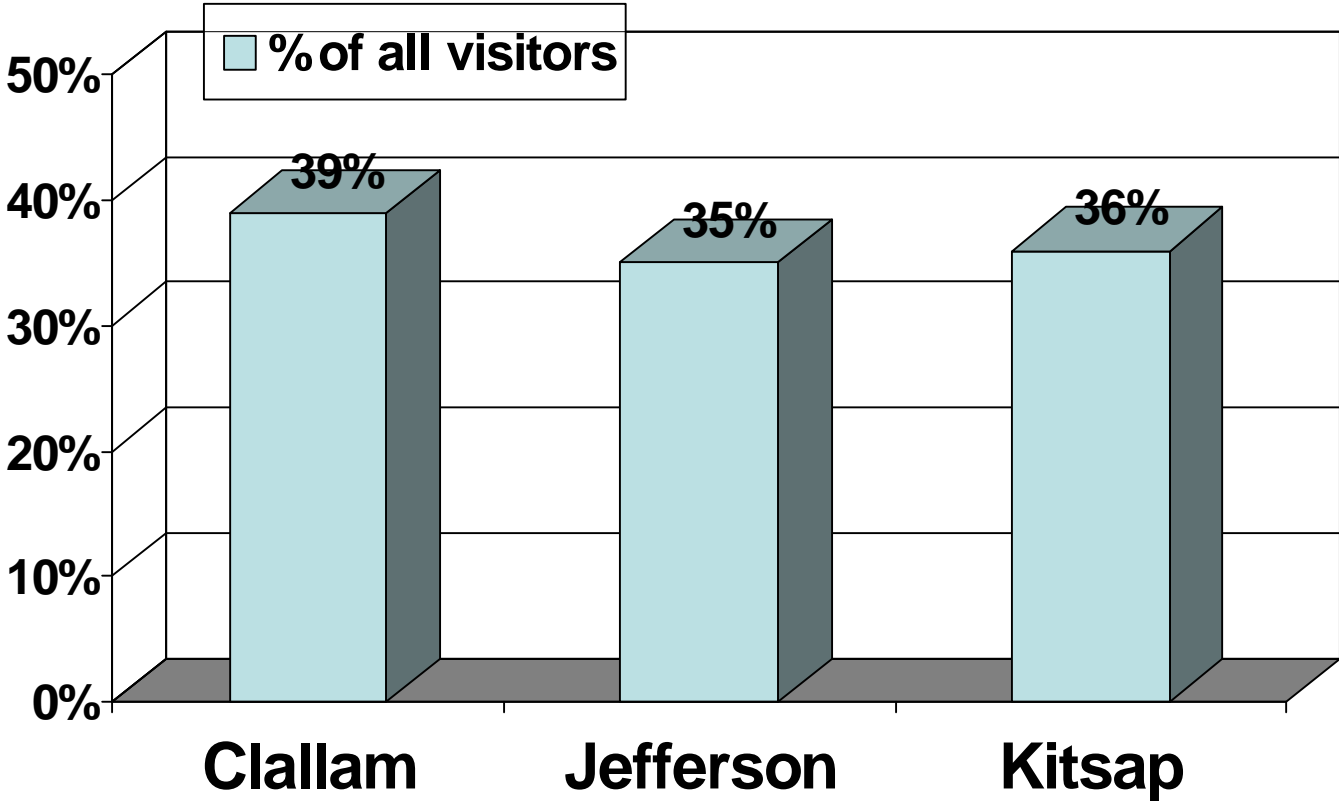
(as a percentage of all visits within the area)

(all visitors)

<b>WASHINGTON DESTINATION AREA</b>	<b>Overnight Visits as % of Overall Visits</b>
<b>Clallam</b>	<b>46%</b>
<b>Jefferson</b>	<b>56%</b>
<b>Kitsap</b>	<b>41%</b>

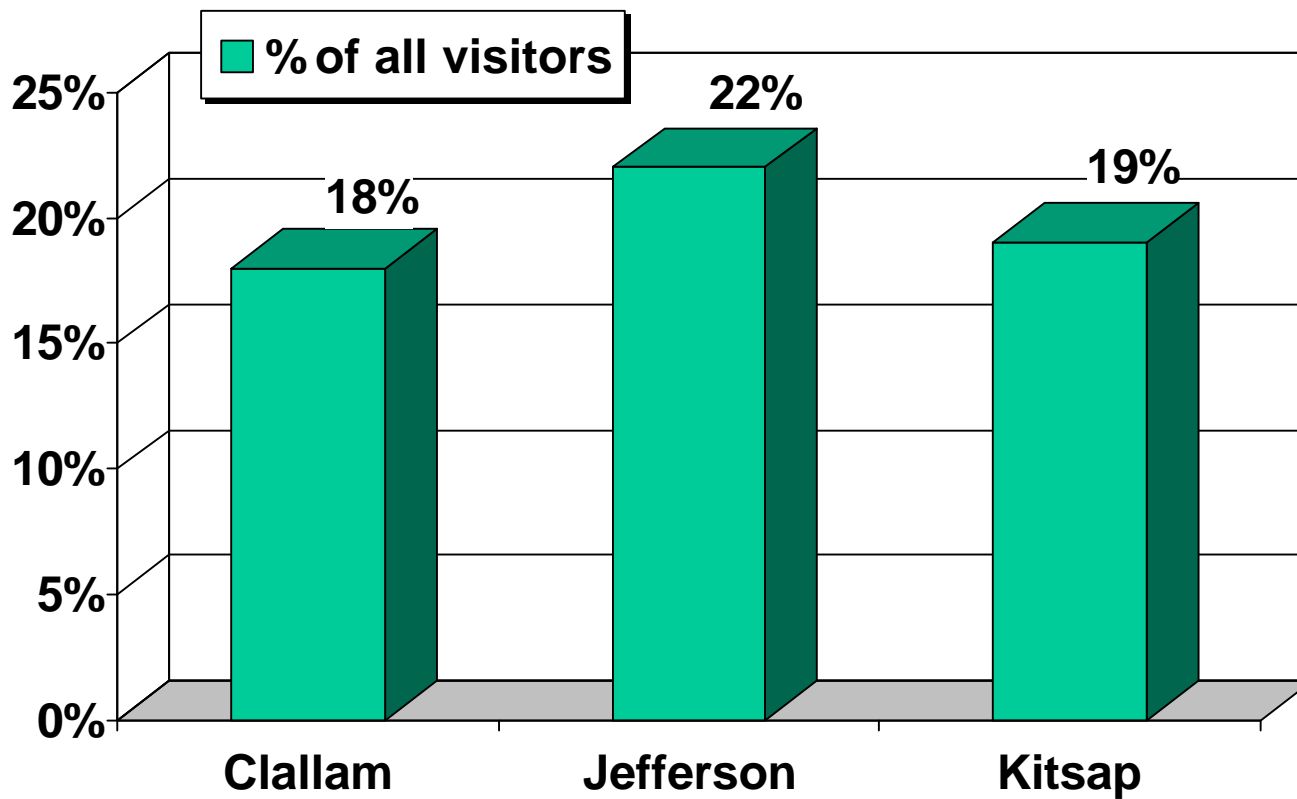
# Olympic & Kitsap Peninsulas 2002 Visitor Profile

Comparison Within Olympic/Kitsap Peninsulas – Visitors Traveling With Children/Grandchildren (18 & under)  
(all visitors)



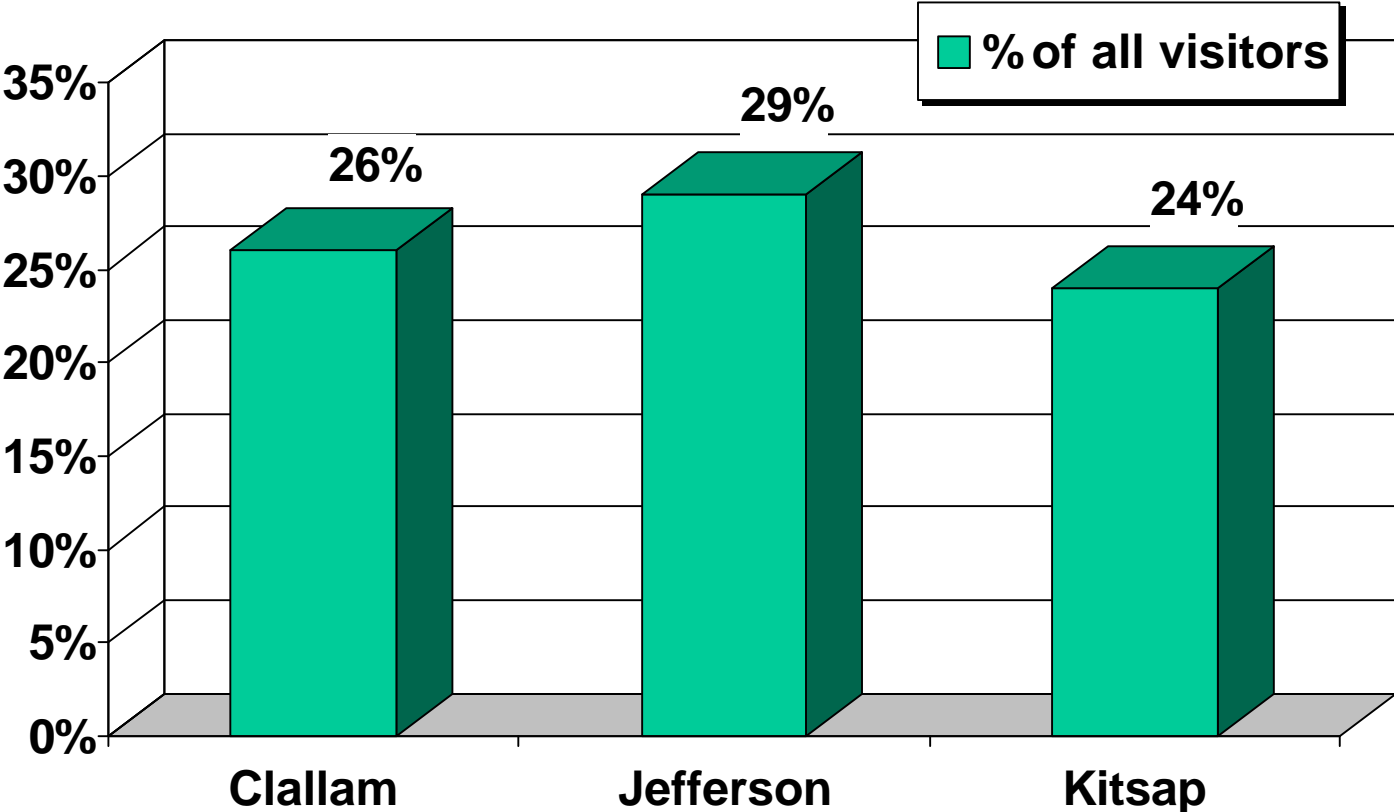
## Olympic & Kitsap Peninsulas 2002 Visitor Profile

Comparison Within Olympic/Kitsap Peninsulas –  
Childless Couples (all visitors)



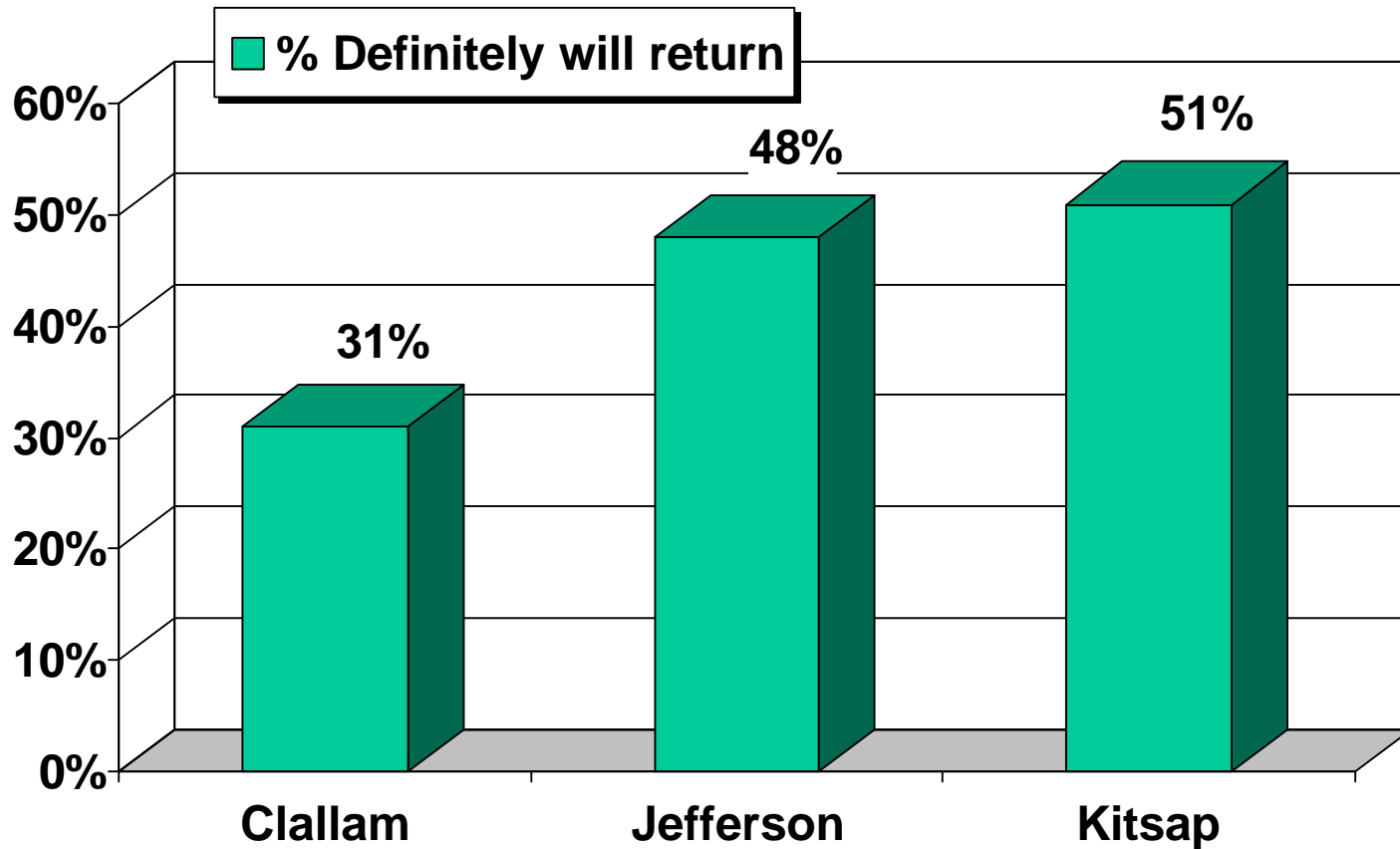
# Olympic & Kitsap Peninsulas 2002 Visitor Profile

Comparison Within  
Olympic/Kitsap Peninsulas – Empty Nesters  
(children no longer living at home)



## Olympic & Kitsap Peninsulas 2002 Visitor Profile

### Comparison Within Olympic/Kitsap Peninsulas – Likelihood of Return Visit\* (all visitors)



\* Likelihood of returning within a year

## Olympic & Kitsap Peninsulas 2002 Visitor Profile

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Comparison within Olympic/Kitsap Peninsulas –  
Washington Residents

<b><u>WA.</u> <u>DESTINATION</u> <u>AREA</u></b>	<b>% visitors from WA state residents</b>	<b>% visitors from King County residents</b>
<b>Clallam</b>	<b>42%</b>	<b>12%</b>
<b>Jefferson</b>	<b>54%</b>	<b>18%</b>
<b>Kitsap</b>	<b>51%</b>	<b>9%</b>

## Appendix 1 – Interview Locations

### **Clallam**

Lake Crescent Lodge/Shadow Mountain  
Makah Cultural & Research Center  
Olympic Nat'l Forest Rec. Center  
Port Angeles VIC  
Red Lion Inn/Port Angeles  
Sequim VIC

### **Kitsap**

Bremerton Chamber  
Island Country Inn  
Keyport Naval Museum  
Port Gamble VIC  
South Port Orchard VIC  
West Coast Silverdale Hotel

### **Jefferson**

Port Townsend VIC  
Sports Townsend  
*unknown*  
*unknown*  
*unknown*