

# Bellingham and Whatcom County

## *Tourism Analysis and Recommendations*

June 2010



Photo Credit: Bellingham Whatcom County Tourism

*Prepared for*

Bellingham Whatcom County Tourism  
Bellingham, Washington



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18 June 2010

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# I. Introduction

Whatcom County, and its primary population center of Bellingham, is located immediately south of the Vancouver metro area and north of the Seattle metro area. There are direct connections north and south by vehicle (Interstate 5) and by rail. Businesses and tourism promotion organizations within the County have capitalized on its assets in order to attract visitors for a variety of activities, ranging from sightseeing in urban, coastal and rural areas, attending special events, shopping and eating, as well as participating in active coastal and mountain outdoor recreation pursuits. Bellingham also is the location of Western Washington University, a regionally important university and an important factor with respect to educational and cultural travel. In addition Bellingham has a large and active seaport that supports recreational and commercial access to the Puget Sound, and Bellingham International Airport provides commercial air service offered by four airlines as well as a variety of business and general aviation operations.

This research is intended to describe visitors to Bellingham and Whatcom County and to provide interpretation and recommendations. Specific objectives include:

- Overview pertinent market conditions and trends that affect travel and tourism in Bellingham and Whatcom County
- Analyze current Whatcom County visitors, including a focus on both urban and rural locations and through contacts with visitors throughout the year
- Recommend approaches to product development and marketing

## Research Sequence

The project began with a review of project objectives and a trip to Bellingham and Whatcom County in order to visit the primary attractions and activity locations in the area and to gather preliminary information regarding visitor attendance and residence. A particular interest at this stage was to identify suitable locations for conducting the intercept survey of visitors over the subsequent seasons of the year.

Following this we prepared an overview of the County's primary visitor-oriented activities and destinations and analyzed basic demographic and economic factors pertaining to travel to the County. Some of this material was used for preparing the questionnaire to be used for the visitor survey.

Finally, in order to gather current data on visitation, perceptions, and attitudes we prepared a questionnaire and intercept survey instructions. Survey data collection was completed by staff and volunteers of BWCT on the basis of an established schedule and selection of survey locations. This survey was conducted between November 2008 and October 2009 in order to properly include all seasons of the year. Completed

questionnaires were coded for analysis and the findings appear in this report. A copy of the questionnaire and a summary of the intercept locations are included in Appendix A.

### Whatcom County Location



## II. Market Assessment

A number of factors influence visitation to Whatcom County, some of which can be influenced by investments in product and marketing. This section provides a review of these factors and an overview of trends that any such investments should take into consideration.

### Primary Factors Affecting Travel

Factors that affect many other destination locations and attractions, influence the appeal of Bellingham and Whatcom County as a travel and recreation destination to a substantial degree, specifically:

- Population size and growth trends, which primarily affect local and regional demand
- Demographic characteristics; chiefly age, income, and family position
- Travel costs (gasoline, in particular) and traffic congestion, which affect the ability of visitors to travel to the area, and are especially important for those traveling from 100 miles away or more
- Exchange rates and border crossing issues, for Canadian visitors in particular;
- Competition from other leisure, recreation and educational destinations and attractions
- Marketing programs, including advertising, travel literature, newspapers and other reporting, web-based information, and visitor activity programming

This study begins with an overview of important demographic and travel trends, preceded here by a review of the primary market segments that the County will probably pursue.

### Primary Markets

The market segments that the County will target will vary somewhat over time, depending on the level and focus of the County's visitor-oriented development, its draw as a visitor destination, its visibility and reputation, and the resources available for its marketing programs. Overall however, the following is a useful segmentation for purposes of discussing demand and the ways by which County development can be oriented toward potential visitors.

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<b>Segment</b>	<b>Primary Characteristics</b>
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### **Geographic Categories**

Metropolitan Seattle	Households within the Puget Sound area, particularly those in the Seattle Metropolitan Area requiring about an hour of travel time; most likely to be repeat visitors
Regional Domestic	Households within two or three hours of the County; day trips are possible for this group, but more likely to be overnight; more likely to stay longer and include more than one activity
Canadian	Households from Canada, primarily the Vancouver Metropolitan Area; influenced especially by exchange rate and border crossing factors
Out-of-State/ Foreign	Travelers from out of the region, some of who are visiting the U.S. from a foreign country; corporate visitors to the region associated with headquarters facilities that are included here; most of these visitors will stay overnight in the area

### **Interest/Demographic Categories**

Families	Primarily middle-aged households, including one or more children; may also include other family members or friends; typically strong interests in outdoor recreation, education; many will live within an hour or two of travel time; may be value-oriented
Young singles, couples	Childless households, sometimes traveling in small groups; often interested in outdoor recreation, fine dining, shopping
Empty nesters	Approaching retirement or retired, with flexible travel schedules; may avoid peak seasons; often interested in dining, shopping, special events/performances and sightseeing; may be value-oriented
Organized groups	May be local/regional resident (church or other social groups, commercial tour groups) but can be from throughout North America and from overseas; often sightseers but interested in specific activities or events such as whale watching or festivals
Outdoor enthusiasts	Households specifically interested in active outdoors activities such as hiking, biking, skiing/boarding, sailing or rafting

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County travel-related marketing and product development programming should keep all of these segments in mind, as well as other segments that become significant as the

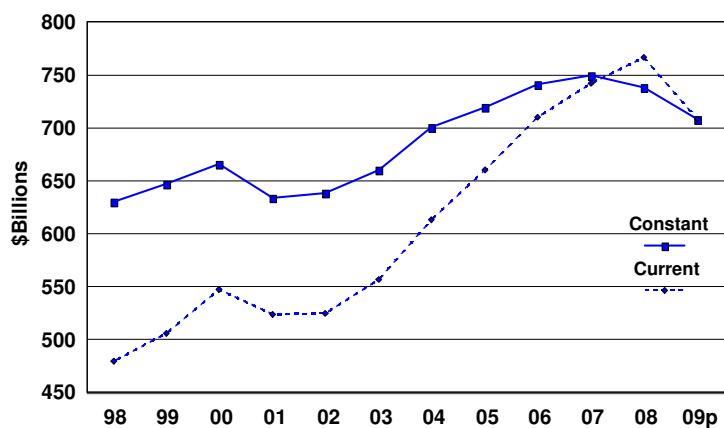
County develops further as a travel destination. A summary section at the end of this document returns to these segments in light of the market research findings.

## National and International Travel Trends

A number of trends are evident in the U.S. that affect the demand for Bellingham and Whatcom County, notably demand from travelers from other parts of North America and foreign locations. Overall, while many of these trends had been very favorable, recent economic uncertainty has dampened the travel and tourism market considerably. As we move forward, economic conditions will continue to influence national and regional demand and travel trends.

Travel spending in the U.S. increased for a number of years, but over the past year or two has been declining. Direct travel spending by domestic and international visitors in the United States was \$708 billion in 2009 (preliminary estimate). This represents a 7.7% decrease from 2008 in current dollars (no adjustment for price changes). The economy-wide recession was primarily responsible for the decline in travel activity, although a substantial portion of the decrease was also due to lower room rates and gasoline prices relative to 2008. When adjusted for changes in prices, real travel spending declined by 4.0%.

U.S. Direct Travel Spending in Current and Constant Dollars, 1998-2009p  
(\$Billions)



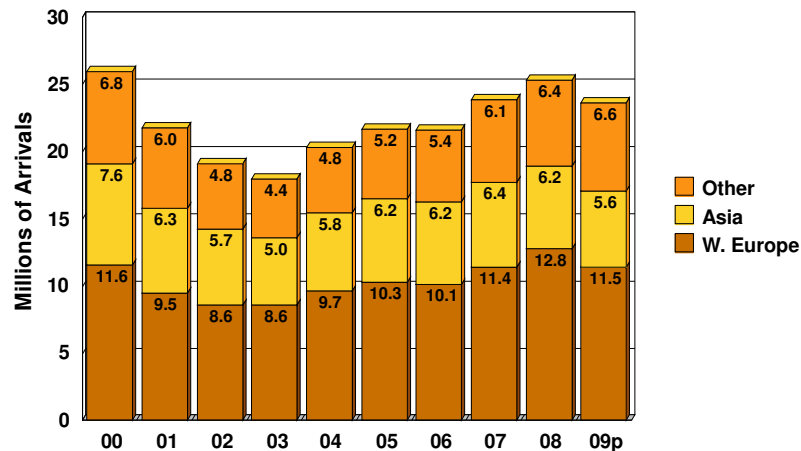
Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts. Constant (2009) travel spending estimates derived from BEA constant (2000) dollar estimates by Dean Runyan Associates, Inc.

The same overall pattern is evident with visitor arrivals on U.S. domestic flights. A slight decline in air travel began in the 2nd quarter of 2008 and accelerated through the 1st quarter of 2009. Preliminary estimates indicate that air travel in the 4th quarter of 2009 will be similar to the same quarter of 2008.

Overseas visitors to the U.S. show a somewhat similar pattern, although the downturn began relatively recently. Overseas visitation was strong through most of 2008, due

primarily to the drop in the value of the U.S. dollar relative to other currencies. However, the worldwide recession and higher airfares on international flights brought about a sharp reduction in overseas travel to the U.S. in 2009. Overseas arrivals were down 6.6% (projected) on an annual basis. Overseas arrivals do not include visitors from Canada or Mexico.

Overseas Arrivals to U.S., 2000-2009p



Source: U.S. Department of Commerce, International Trade Administration, Office of Travel and Tourism Industries. Preliminary 2009 estimate by Dean Runyan Associates based on January through November data.

### Demographic Trends

The following is a summary of a number of demographic trends that pertain to travel within the U.S.

**Aging American Population** The primary population growth is currently in the 45-64 age range, which increased by 31% between 2000 and 2005. The figure for Washington is higher, over 32%. Those age 50-59 are more likely to be empty nesters; only around 20% still have children at home, compared to 75% for those 40-49 years of age. Yet relatively few are retired – only 20%, of those age 50-59, compared to almost 85% for those 65 years of age or more. The retired population will increase strongly after 2010 (those 65 years of age or greater will increase by 36% by 2020).

**More Dual-Earner Households** About 59% of married women were in the workforce in 2005 (compared to 58% in 1990, 50% in 1980 and 40% in 1970), while 75% of married men are in the workforce. Although recent economic factors are affecting workforce participation, with more than one worker, it is more difficult to schedule travel, which often means

shorter, more frequent trips. Studies conducted by the U.S. Travel Association (USTA) report shorter and leisure-oriented trips taken by married travelers 45 and older now dominate the travel market. Further, short trips (1-2 nights) are now reported to be far more popular than longer trips. Shorter trips tend to be more single-purposed – focused on one or two activities; the most popular consist of shopping, outdoor activities, historical places/museums, beaches or national/state parks.

Increasing Incomes for Some Americans Incomes of professional, educated households have been increasing, producing a segment of the population with adequate resources for travel and recreation. Workers with a Bachelor's or Master's degree had faster income growth, compared to those with a high school diploma. However there is a segment that can and will continue to travel, although on a more limited basis and very value-oriented.

Educated Population The American population is becoming increasingly educated; in 2008 over a quarter (27%) of American adults, ages 25 and older, have four or more years of college, compared to 24% in 2000, 20% in 1990, 17% in 1980 and 11% in 1970. Educated travelers tend to be interested in information-rich activities.

### *Travel Trends*

Shorter Vacations, More Frequently North American households are more likely to take long weekend and other relatively short trips; the incidence of extended, multi-destination long-distance travel has been on the decline. More than half of all travel trips in the U.S. are now for two days or less, with only two in ten trips lasting a week or more. Thus a majority of travelers are taking vacations closer to home. Half of Americans in a recent USTA survey of travelers said they planned to travel closer to home.

Slowing Meetings Travel Travel for meetings, conferences and conventions was on a long-term growth trend throughout the 1990s, associated with the growing U.S. economic activity of the period. This segment has varied since 2001.

Organized Group Travel Organized group travel -- by motorcoach, cruise ship or air transportation -- increased through the 1990s, however, this growth essentially stopped in 2001 and 2002 (with a 9% decline). However, long term increases in this segment should continue, as it is highly correlated to the aging of the North American population and increasing incomes. Much of this travel is during summer and is very value-oriented.

Seasonality The preferred leisure travel season is June, July and August when well over a third of leisure travel occurs. Family travel in particular, is oriented to these three summer months. Spring and Fall travel tends to

be somewhat more popular among empty nesters, and is popular in the Southern tier due to cooler weather. Gaming-oriented travel occurs year-around; meetings/convention travel is more oriented to fall and spring.

Demand for Education, Packaged Experiences	The growth in travel and vacation trips including children has increased the demand for educational experiences. Many analysts have noted a “back to basics” sentiment in the leisure travel market since 2001. This means vacations and travel activities involving family, nature and America itself. Trips to visit friends and relatives, visiting national and state parks, and increased interest in America’s heritage and culture sites will be the preference.
More Combined Business and Leisure Travel	Travelers are more often extending business trips to include leisure activities. These travelers provide a good market for destinations in or adjacent to major metro areas. Business trips are also more likely to include spouses and children than in the past, (these trips increased 25% between 1994 and 2002, for example, while solo trips declined by over 5%). However, the majority of business trips (74%) are taken by solo travelers.
Increasing Importance of Entertainment	Entertainment is an increasingly important component of travel and recreation, and of education as well; travelers and facility users expect very good presentation, interactivity, and visual appeal. Competition and gaming are very popular as well.
Travel Parties and Grandparents	Travel parties including grandparents are increasing. These trips may have an educational focus and would not tend to include strenuous activity.
Increasing Membership Programs	Travel associated with membership programs is increasing: RV clubs, senior citizen organizations, churches, membership reward programs (e.g., frequent fliers). Family reunions are a popular reason for travel.
International Travel in the U.S.	Travel from foreign destinations, like most other segments of travel, increased through the 1990s. Following a decline after 2001, growth has accelerated since 2004, expanding to nearly 56 million arrivals by 2007. The most important markets are Canada and Mexico, which send more travelers to the U.S. than any other foreign nations, with 17.8 and 14.3 million arrivals, respectively, in 2007. The UK is the top overseas country for inbound travel, with nearly 4.5 million arrivals, followed closely by Japan with 3.5 million. Germany, France, South Korea, Australia, Italy and Brazil round out the top ten. These travelers are especially interested in things that are historic, unique and memorable. International travel is strongly affected by exchange rates.

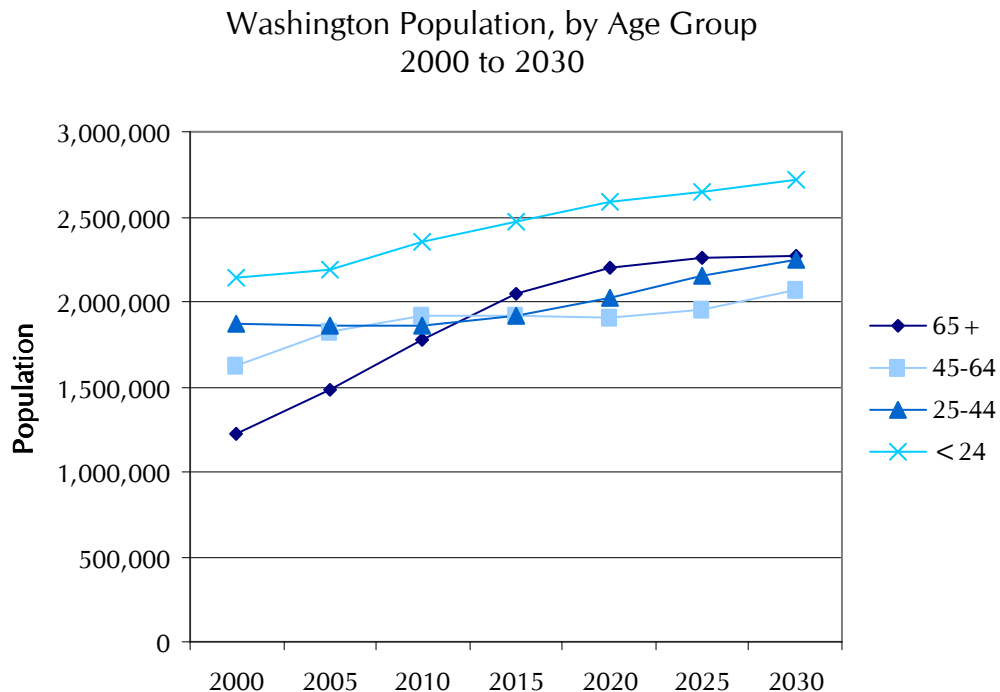
The primary pertinence of these factors is discussed in the review section at the end of this chapter.

## Washington Population Factors

Population projections for Washington indicate substantial increases in the future. As is evident in the figure below, the number of residents in Washington in all age categories has been increasing, and is projected to increase further in the decades ahead. Because a substantial portion of this population is located in the Seattle Metropolitan area, relatively close to Whatcom County, the potential demand for visitation will increase accordingly.

Shifts in age segments are also illustrated in this figure in terms of age projections for Washington population for four age groups. The two age groups representing people 44 and under currently represent the largest portion of the state's population, and the portion 24 and younger are projected to continue growing such that they continue to represent the largest single category.

The most notable changes will be in the number of people age 65 and older, which will become the second largest category by 2015. This group, as the visitor profile data will show in a section further below, is an important segment for Whatcom County.



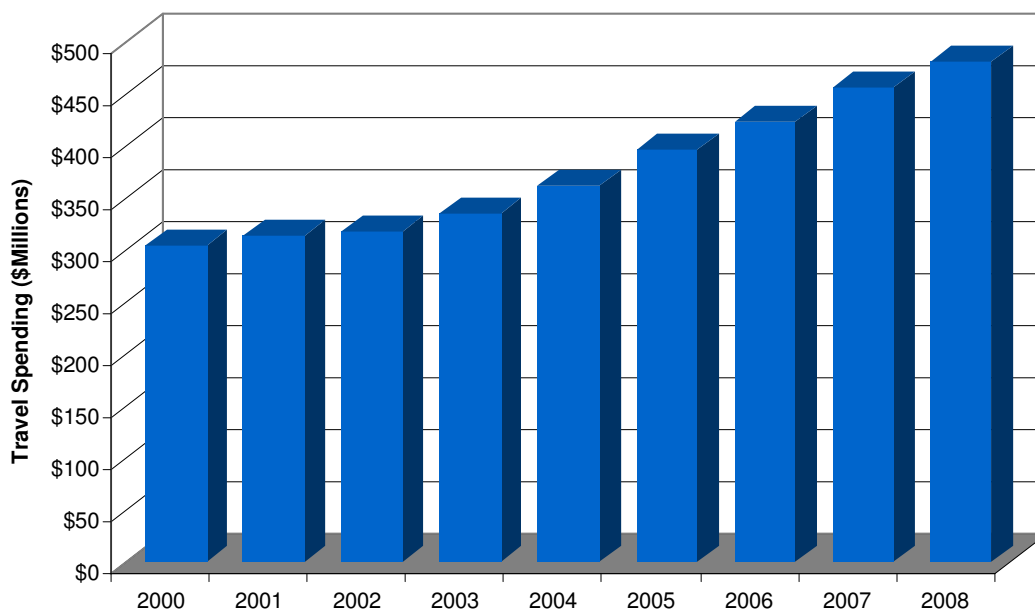
Source: WA OFM/Dean Runyan Associates

These population growth patterns obviously vary among regions and communities, some of which are seeing population declines while others experience rapid growth. Age dynamics can also vary substantially by community, with some destination-oriented locations, for example, seeing the number of empty nest and retired population increase more than other locations in the state. Economic factors such as job and business prospects are also very important factors.

## Regional Travel Trends

Whatcom County has a well-established position as a travel and recreation destination. It includes a number of coastal, outdoor recreation, events and other attractions, and enjoys a substantial advantage in its proximity to the most populated areas of both Washington and British Columbia. Available data on travel-generated spending in the County show steady growth for a number of years, as illustrated by the figure below. Total spending by visitors to the county rose steadily to over \$460 million in 2008, the most recent year for which County-level data are available. These amounts include both domestic and foreign travelers, including Canadians.

Whatcom County Travel Spending, 2000 –2008



Source: Dean Runyan Associates

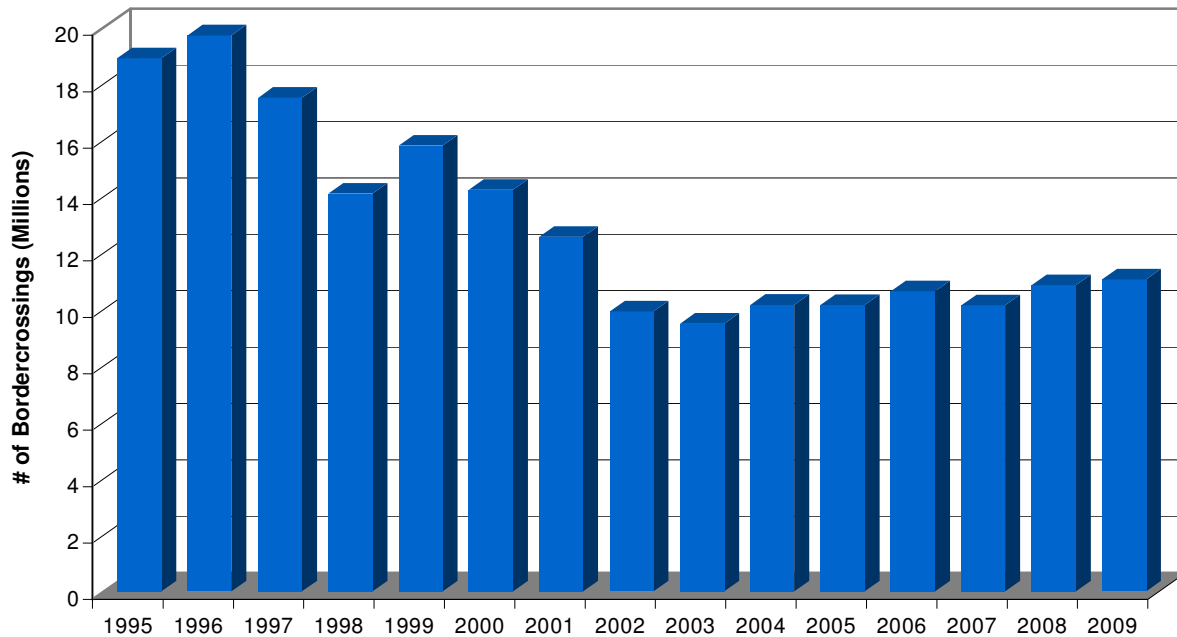
## Canadian Travel

As will be evident by the analysis that appears in Section III, travel by Canadians is an important segment for Whatcom County. A number of significant factors, including distance to Canadian population centers, exchange rates, and boarder crossing

procedures influences such travel however. As is evident from the figure below, overall Canadian traffic into Washington has declined from a high in 1996. This has occurred even though the population of Vancouver and British Columbia increased during this period. More recently, however, a slow but steady pattern of growth has been evident.

These trends, combined with the figures immediately above on travel spending, suggest that travel from Canada has not been the source of increases in travel spending in the County, although it is clearly a significant factor. The extent to which Canadian travel will increase in the future is difficult to predict, depending in part on exchange rate and border crossing factors. Other factors equal, Vancouver and British Columbia population will presumably continue to grow, increasing the overall size of the Canadian market.

Border Crossings (persons) from Canada to Washington, 1995 –2009



Source: Dean Runyan Associates

## Implications

The following are some of the primary implications of the market research findings:

- The County is very well situated with respect to population concentrations in Washington and British Columbia, and will benefit from a growing number of well-educated people and an affluent population in its local/regional market area

- The largest age segment of the primary market area will continue to be relatively young people, indicating the importance of attracting families and young, active visitors
- The older segments of the population in the region will grow relatively quickly over the next decade or two and represent an important, growing market
- Travel from Canada to the U.S. had slowed but is now increasing slowly, and could represent a more important factor in the years ahead, contingent on exchange rate and border crossing issues

### III. Travel Characteristics

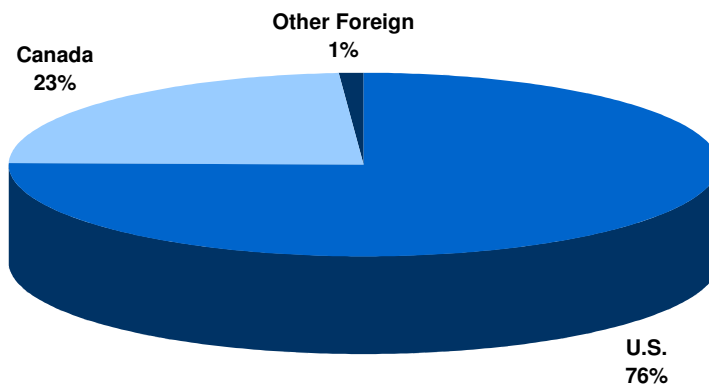
#### Visitor Origin and Experience

Knowing visitor origin is valuable for developing advertising programs for which geographic and message targeting is required. Breakouts by repeat visitation and season help further to target potential markets.

#### Three quarters of visitors to Bellingham/Whatcom County are from the U.S.

Bellingham/Whatcom County gets most of its visitors from the U.S. and, as will be evident and discussed below, from within the state. However, nearly a quarter of the County's visitors are from Canada, a rather large percentage—larger than neighboring counties— that can be attributed to the County being located directly along the border.

National vs. International Visitor Origin

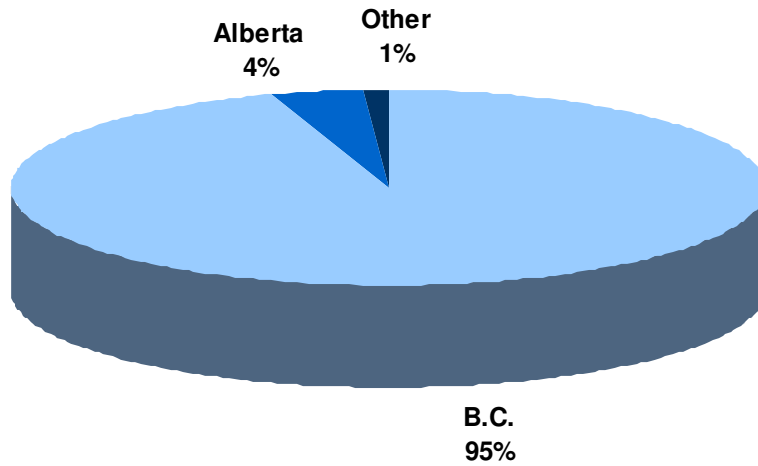


Source: Dean Runyan Associates

#### Only a very small percentage of Canadian visitors are not from British Columbia

As British Columbia is the closest Canadian province to Whatcom County, making up its entire northern border, understandably the great majority of Canadian visitors come from B.C.

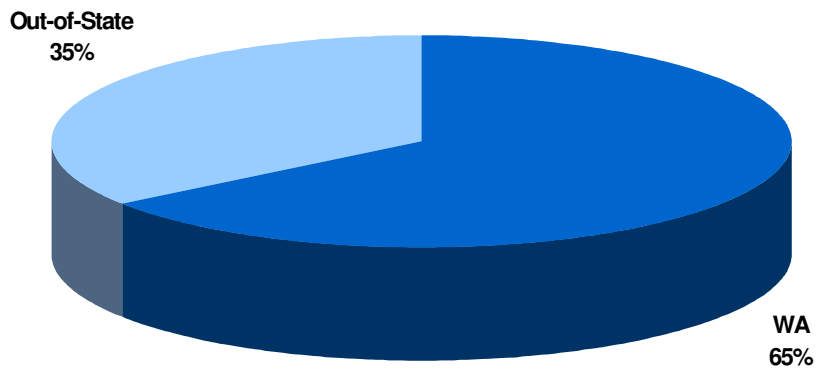
### Breakout of Canadian Visitors



Source: Dean Runyan Associates

### Over two thirds of visitors to Bellingham/Whatcom County are from Washington

#### Washington vs. Out-of-State Visitors

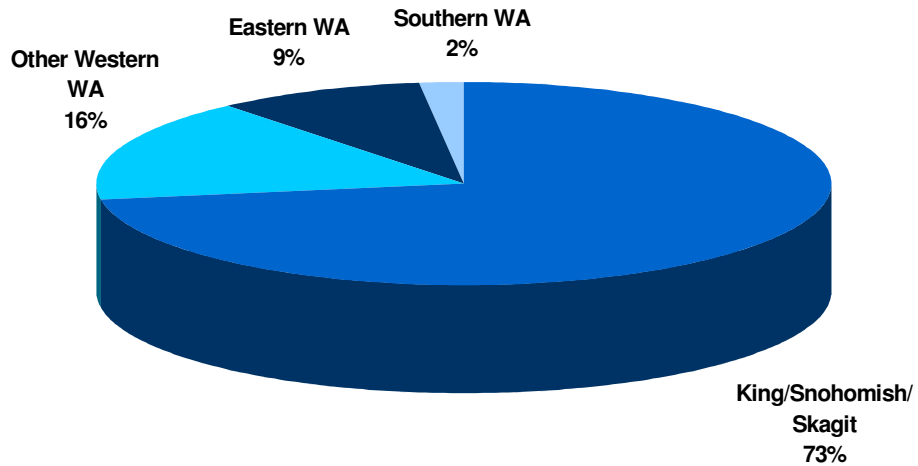


Source: Dean Runyan Associates

### Most visitors are from the Seattle/King County Metropolitan Area

Nearly three quarters of Bellingham/Whatcom County visitors come from the County's three nearest southern counties: Skagit, Snohomish, and King County. Much of this can be attributed to the Seattle/King County Metropolitan Area— the largest and most active market in the Northwest and an internationally-recognized visitor destination.

### Regional Breakout of Washington Visitors

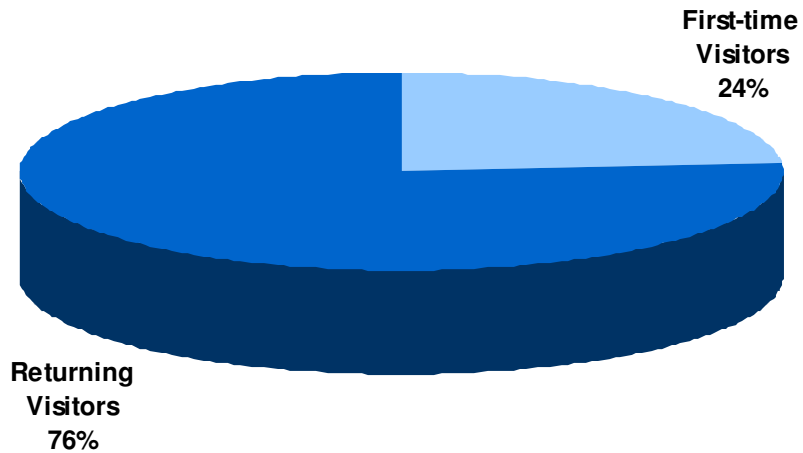


Source: Dean Runyan Associates

### Over three quarters of Whatcom County visitors have been to the County previously

Repeat visitation for the Bellingham/ Whatcom County area is high, with only about a quarter of visitors being there for the first time. The high proportion of repeat visitation is consistent with the relatively nearby residence of many visitors.

### Percentage of First-time and Returning Visitors



Source: Dean Runyan Associates

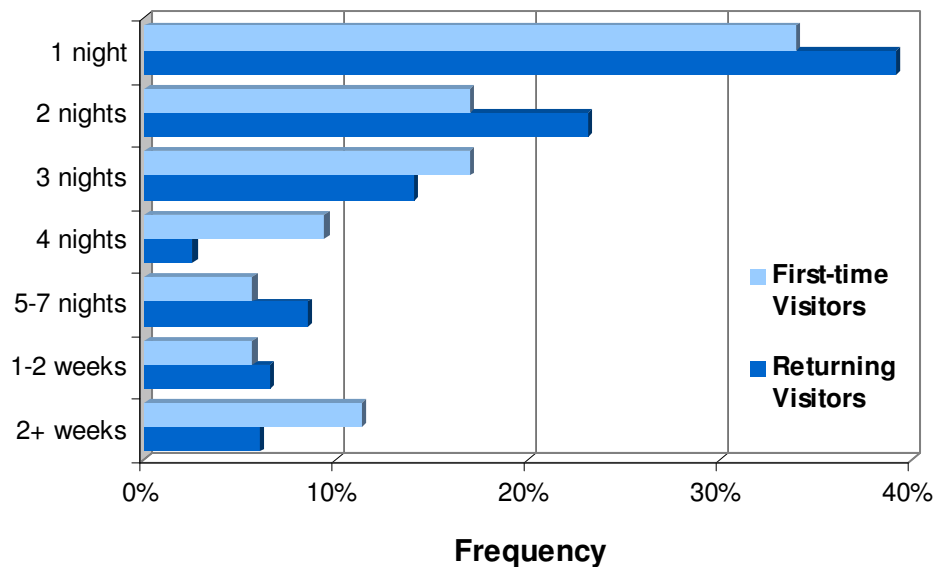
## First-time and Returning Visitors

### First-time visitors are more likely to stay longer

Those visiting for the first time are more likely than repeat visitors to stay for three or more nights, with the exception of longer stay visitors – one or two weeks or more – who tend to be repeat visitors. It is likely that the latter group is those staying with friends or relatives.

This pattern indicates that repeat visitors, probably on the basis of their experience from earlier visits, plan longer trips to the County that include a more involved itinerary.

Length of Stay in Bellingham, First-time vs. Returning Visitors

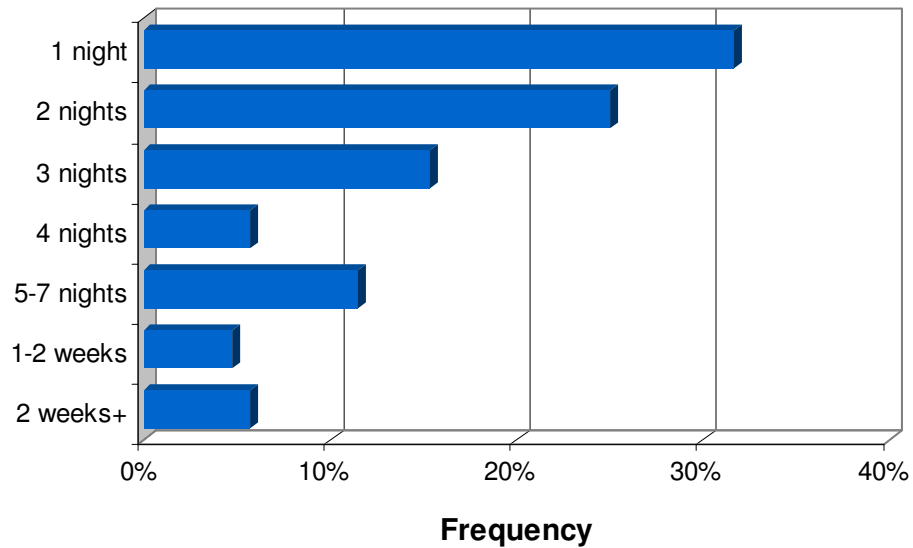


Source: Dean Runyan Associates

### Visitors staying overnight outside Bellingham are most often in the area for one or two nights

This pattern is similar to those staying in Bellingham, although the proportion that stays for three nights is somewhat higher. This pattern may be associated with camping and outdoor recreation such as skiing.

### Length of Stay Outside Bellingham for Overnight Visitors



Source: Dean Runyan Associates

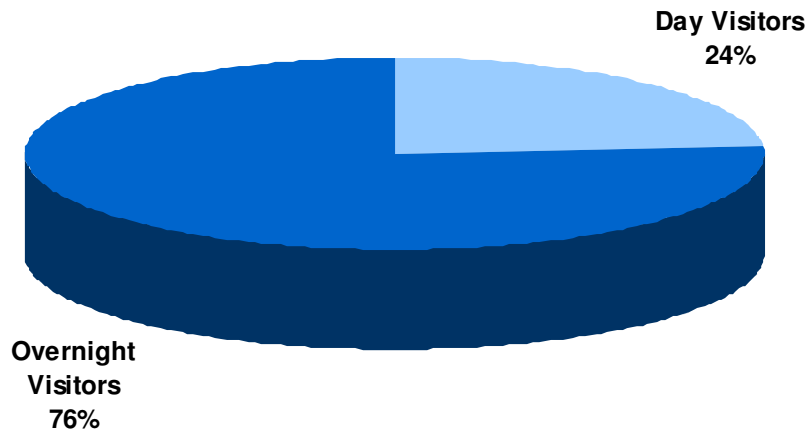
Data are not adequate to break out first time visitors among those who stay overnight outside Bellingham.

### Overnight and Day Visitors

#### About three quarters of Whatcom County visitors are staying overnight in the County

Overnight visitation is particularly beneficial due to the higher visitor expenditures associated with lodging and food service. This relatively high proportion implies that many visitors are treating the County as a mini-vacation destination rather than a location for a quick visit. As will be evident below, this finding is consistent with visitor travel and activity patterns in the County.

### Percentage of Day and Overnight Visitors

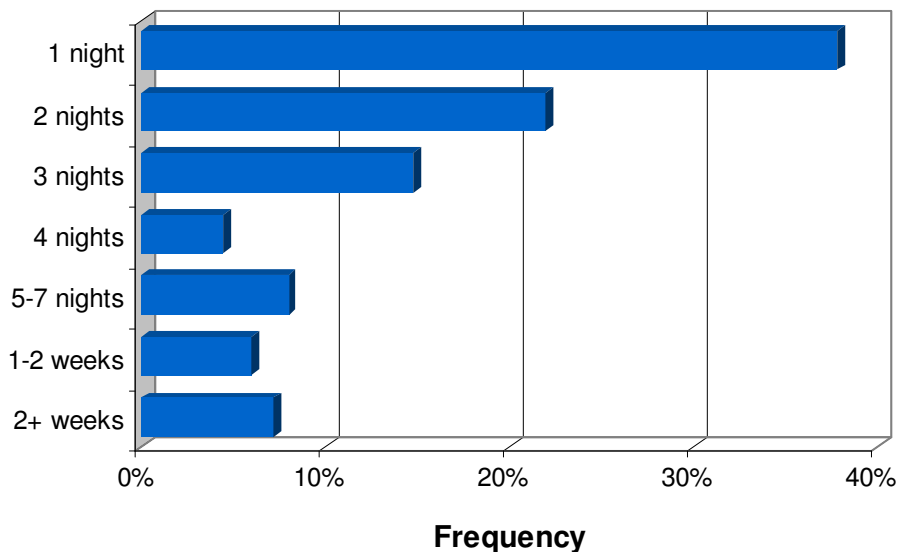


Source: Dean Runyan Associates

### Overnight visitors staying in Bellingham most often stay one or two nights

Stays in Bellingham are often relatively short, rarely longer than 3 nights, with single night stays making up nearly half of visitors staying in Bellingham. This can be attributed to the nature of the trips made to Bellingham, which tend to be for urban recreation such as visiting the museums, galleries, restaurants etc.

### Length of Stay in Bellingham for Overnight Visitors



Source: Dean Runyan Associates

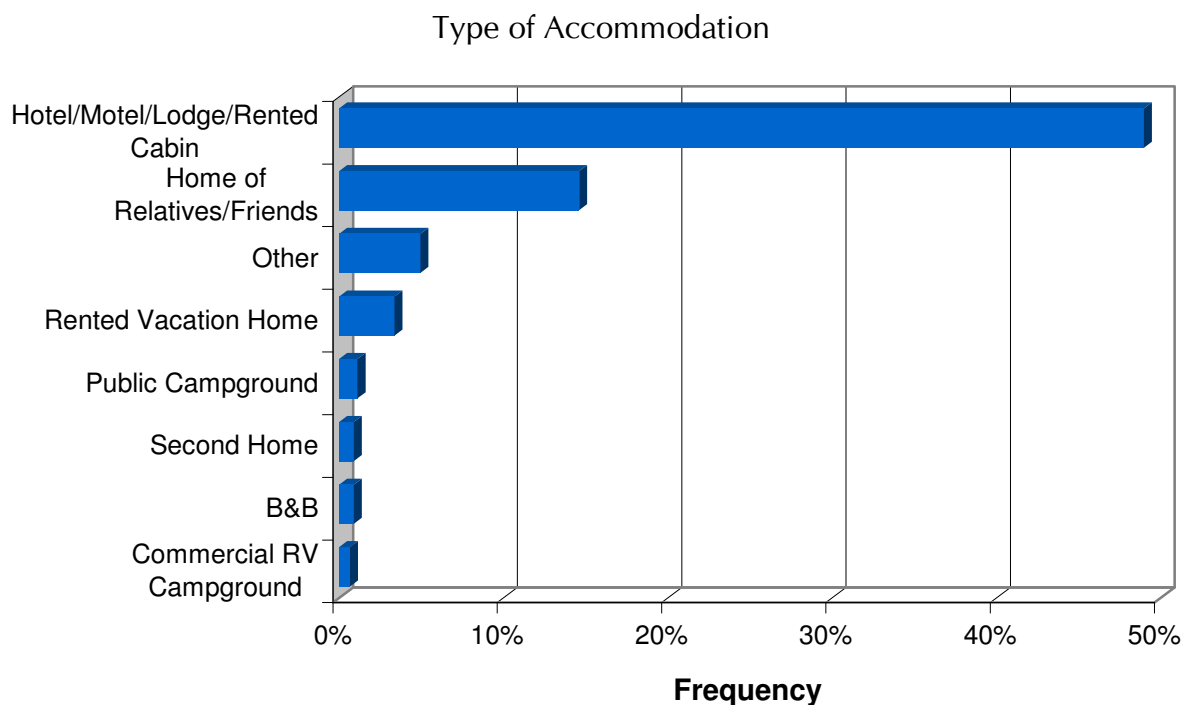
The length of stay for overnight guests outside of Bellingham follows the same trend as those that stay within Bellingham with 1-3 nights making up a great majority of the trips.

There are however, a slightly smaller number of 1-2 nights and a slightly larger number of 5-7 night stays. The reason for this increase in longer trips is most likely due to inclusion of visitors that partake in camping and RV trips, which do not take place in Bellingham.

## Accommodations

**The great majority of overnight visitors to Bellingham/Whatcom County choose to stay in a hotel/motel or some other form of rented lodging**

Nearly half of all overnight visitors choose to stay in rented lodging followed by small 15% that choose to stay with relatives and friends. Visitors that choose to stay in other types of accommodations are few.



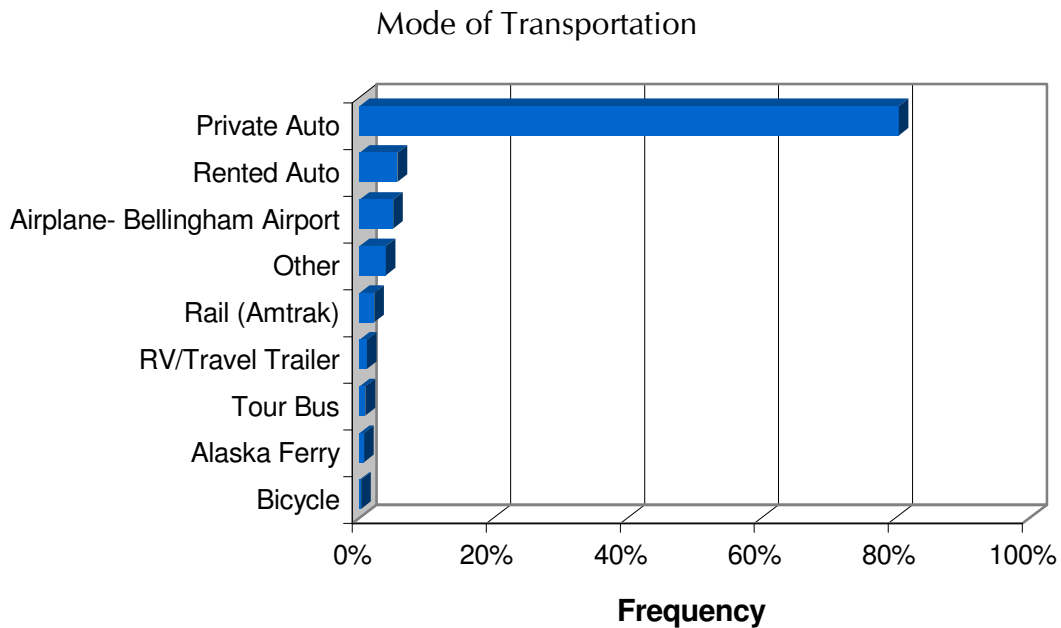
Source: Dean Runyan Associates

There is not a notable difference between the choice of accommodations for all overnight visitors and first-time and returning visitors, or much of difference when comparing first-time visitors to returning visitors. All visitors seem to greatly prefer rented lodging.

## Mode of Transportation

The great majority of visitors to Bellingham/Whatcom County travel by private auto

Nearly 80% of all visitors come by way of their own vehicle, which is consistent with the high number of day and Canadian visitors. The majority of overnight visitors tend to be from surrounding counties and the Seattle Metro area as well. Due to the overwhelming preference for private auto for all visitors, any variation among day and overnight visitors and first-time and returning visitors, was slight.



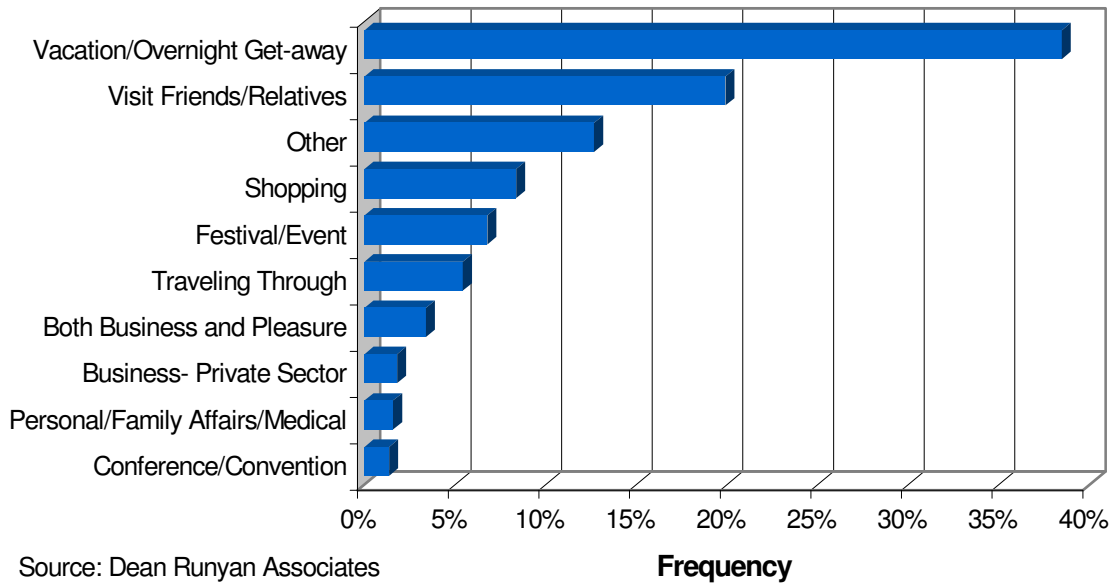
Source: Dean Runyan Associates

## Purpose of Trip

Visitors to Bellingham/Whatcom County tend to visit for a short get-away and/or visit friends and relatives

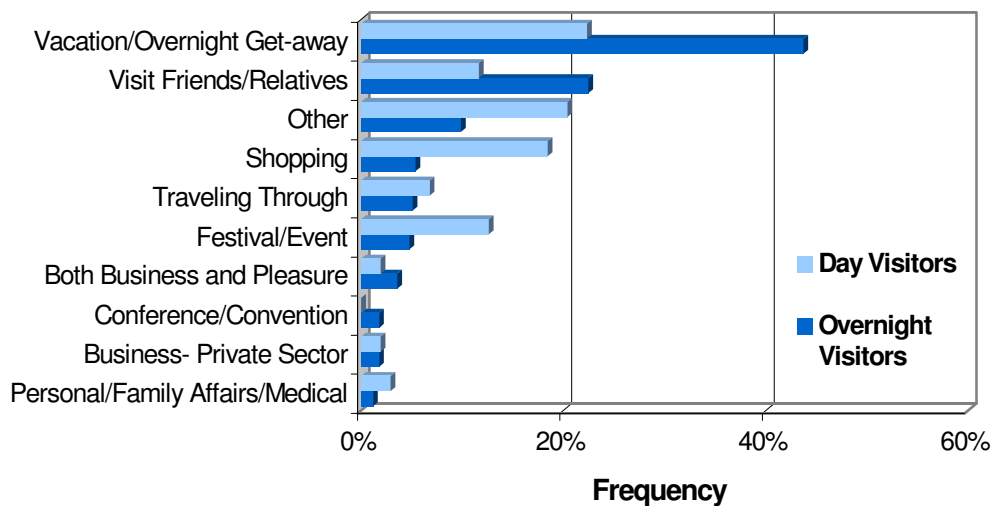
This is consistent with the fact that the majority of visitors tend to be traveling from a neighboring county or British Columbia, Canada. There is not much of a contrast when the data are broken out by returning and first-time visitors, and as the majority of the data are representative of overnight visitors, understandably their activities follow this same trend.

### Primary Purpose for Visiting Whatcom County



The purpose for day visitors, however, tends to be quite different. Along with a vacation or overnight get-away, day visitors tend to come to Bellingham/ Whatcom County for shopping as well as a festival or event with no overwhelming preference for one activity over the other.

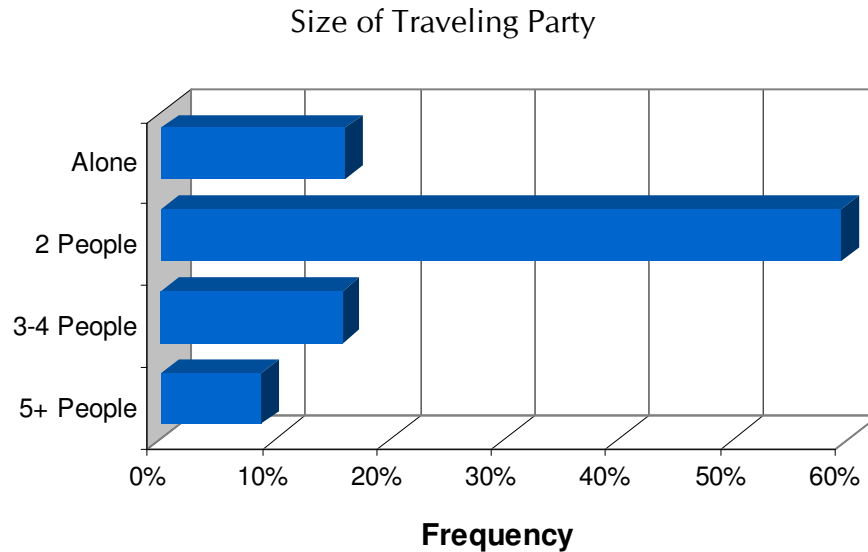
### Purpose of Trip, Day vs. Overnight Visitors



## Party Size

The great majority of visitors travel to Bellingham/Whatcom County as a party of two

As will be evident and discussed further under 'Visitor Demographics', this is consistent with the fact that the majority of visitors are middle age or older and are not traveling with children.

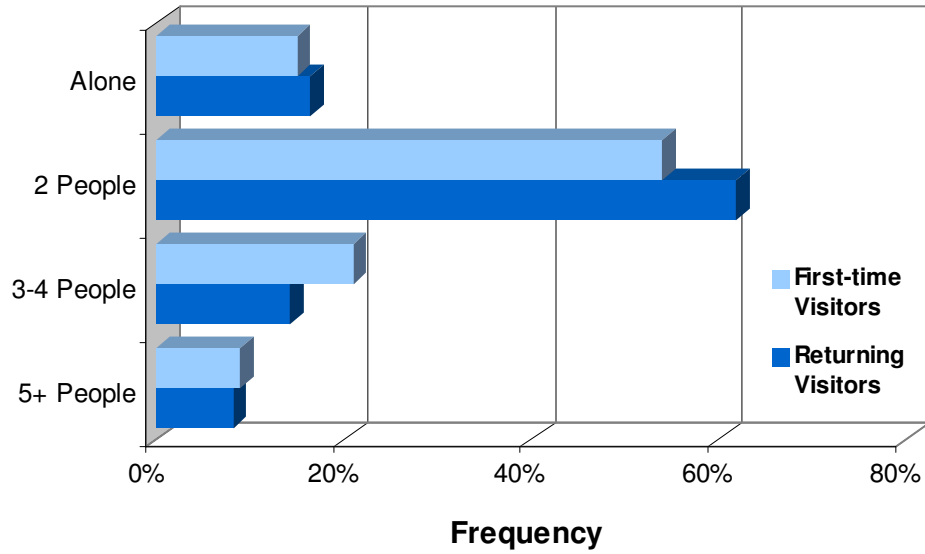


Source: Dean Runyan Associates

### First-time visitors are a bit more likely to have a larger traveling party than returning visitors

First-time visitors have a slightly higher percentage of 3+ people in their traveling party whereas returning visitors are more likely to travel in pairs or alone. As will be evident in and discussed further in 'Visitor Demographics', this could be attributed to the fact that returning visitors have a higher percentage of older adults and thus are more likely to be empty-nesters.

### Size of Traveling Party, First-time vs. Returning Visitors

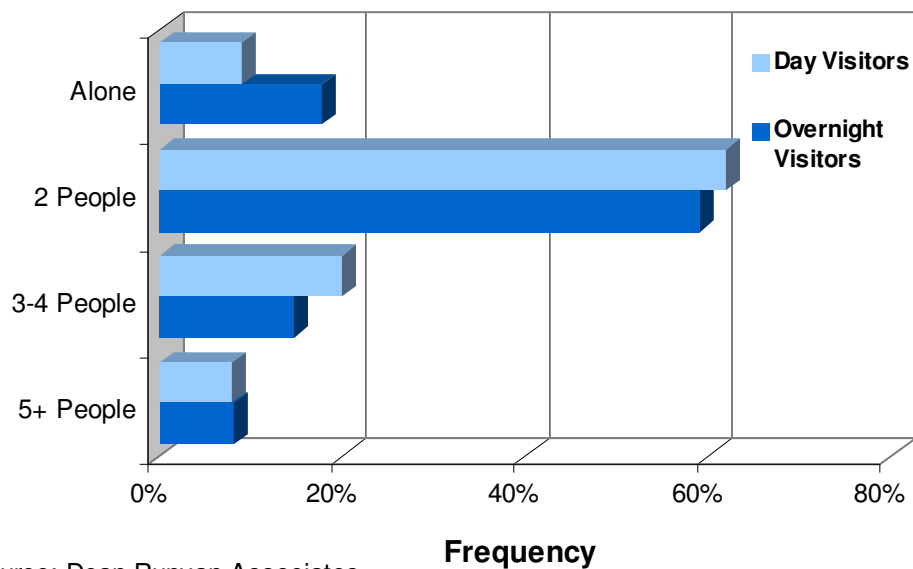


Source: Dean Runyan Associates

### Day visitors are more likely to travel in larger groups than overnight visitors

Though both day and overnight visitors tend to travel in groups of two, day travelers have a higher percentage of groups number three and up, whereas overnight visitors are more likely to travel alone than day visitors. One reason for this is that there are a notable percentage of travelers that come to Bellingham/Whatcom County on business and stay a night or two.

### Size of Traveling Party, Day vs. Overnight Visitors

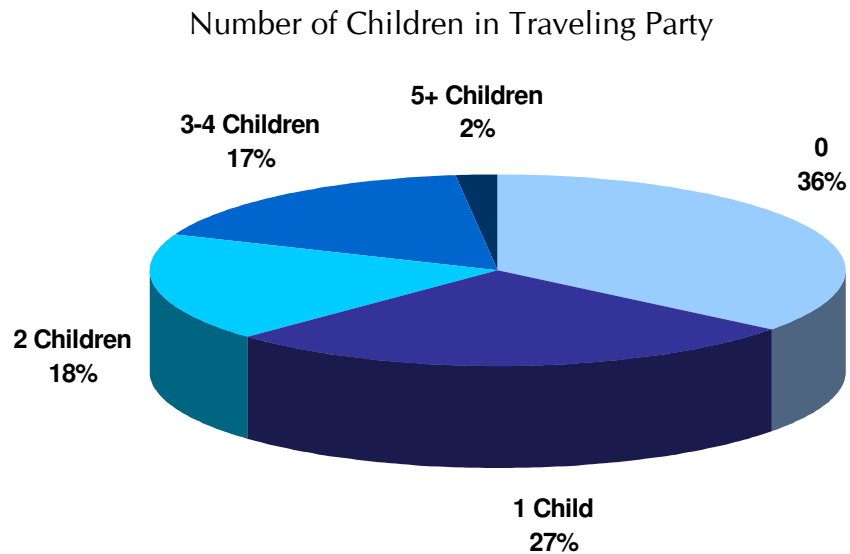


Source: Dean Runyan Associates

## Traveling with Children

**Roughly two-thirds of visitors to Bellingham/Whatcom County travel with zero or one child only**

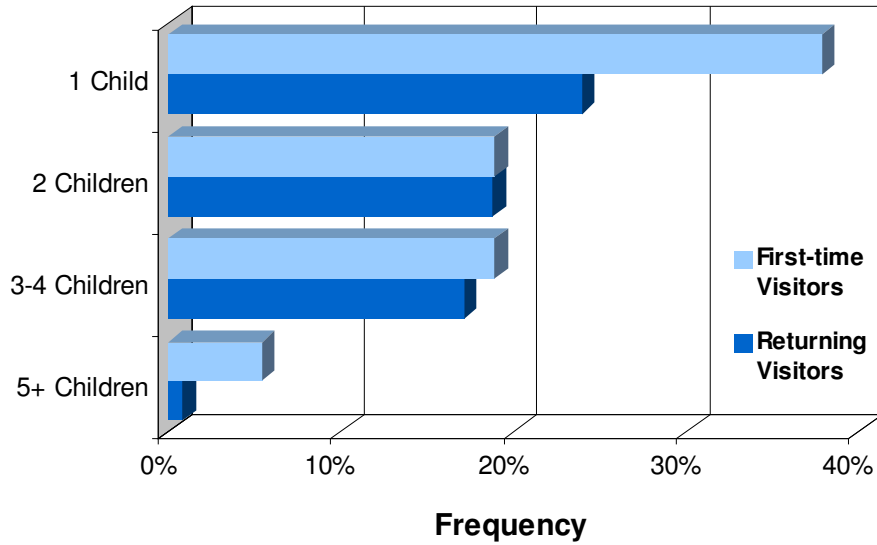
63% of visitors travel with no more than one child with 36% with no children at all. As will be discussed further in 'Popular Activities', a large majority of Bellingham/Whatcom visitors participate in urban recreation, who in particular tends to be older adults.



Source: Dean Runyan Associates

The majority of first-time visitors travel with children whereas the majority of repeat visitors do not have any children in their party. This could be due partly to the fact that Bellingham/Whatcom County is particularly strong in what it offers in terms of urban recreation such as museums, sightseeing, and strolling through downtown Bellingham. Activities are geared more towards adults than children and parents return alone to experience this further.

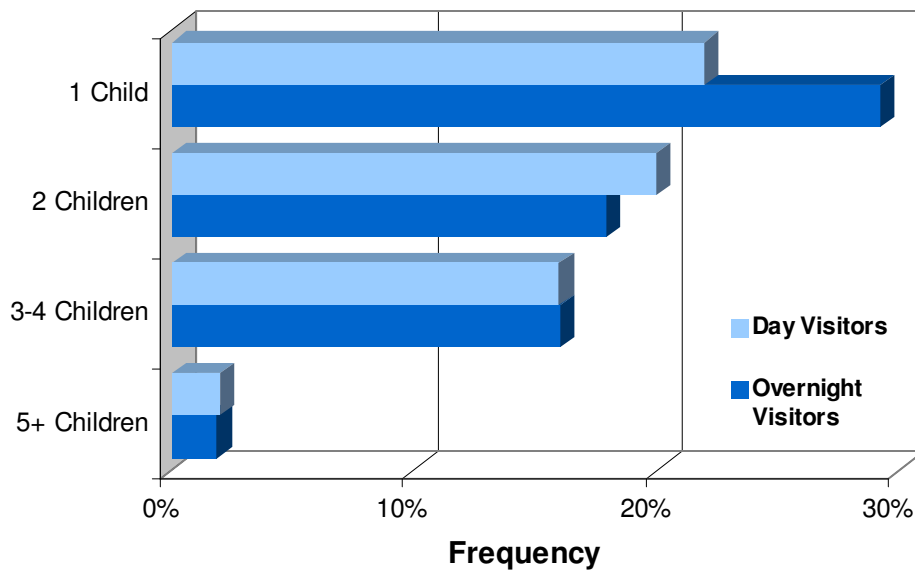
Number of Children in Traveling Party, First-time vs. Returning Visitors



Source: Dean Runyan Associates

The breakout for day and overnight visitors follows the same trend as all visitors- where most visitors are traveling without children and the percentage of those traveling with children slowly decreases as the number of children in the party increases.

Number of Children in Traveling Party, Day vs. Overnight Visitors



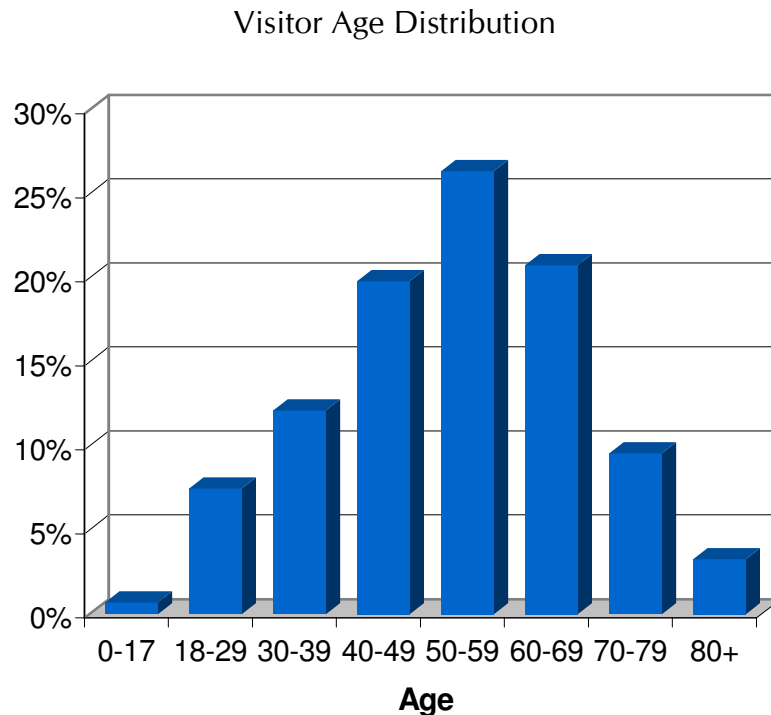
Source: Dean Runyan Associates

## IV. Visitor Demographics

Visitor demographics can prove to be an important indicator of a destination's strengths and weaknesses. By understanding the type of people that most often travel to the County, the County can gather some insight into what activities and attractions are most popular as well as develop priorities for new activities and attractions that could be developed further.

### Most visitors to Bellingham/Whatcom County are middle age or older

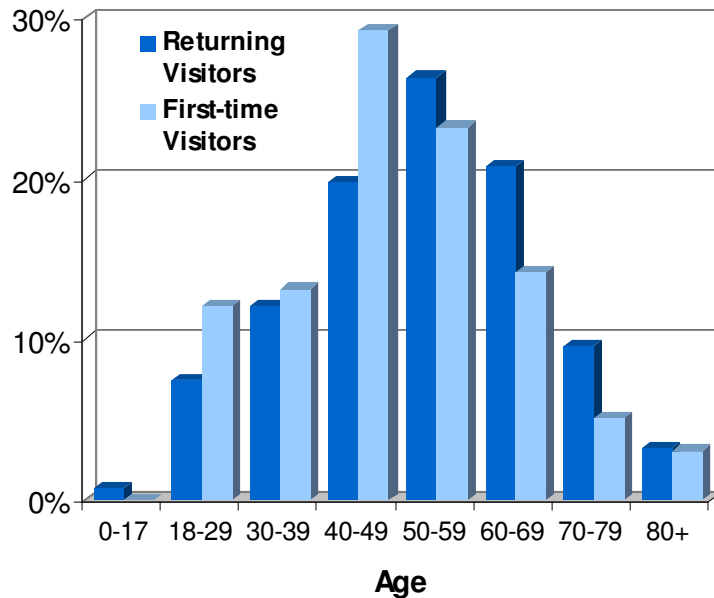
80% of visitors to Bellingham/Whatcom County are middle age or older. The largest age category, with 26%, is adults 50 to 59.



Source: Dean Runyan Associates

For the most part the age breakout of visitors by first-time and repeat visitors follows the same trend as the breakout for all visitors except that the largest percentage of first-time visitors fits is the 40 to 49 age category rather than the 60 to 69 category.

### Age Distribution, First-time vs. Returning Visitors



Source: Dean Runyan Associates

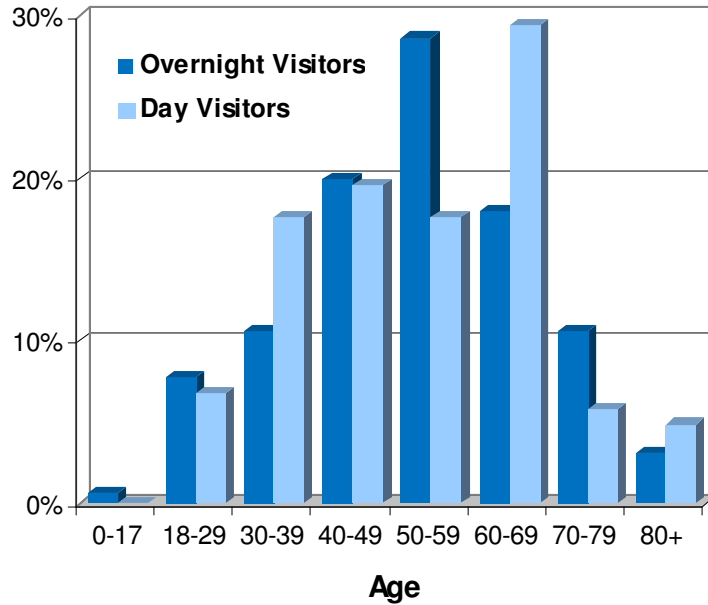
**The majority of Bellingham/Whatcom County visitors that make a day trip are middle aged or older**

Older adults between the ages 60 to 69 make up the majority of day trips to Bellingham/Whatcom County. Older adults are more likely to participate in activities such as visiting museums, shopping, dining out etc., all of which are readily available in Bellingham.

**Adults between the ages of 50 to 59 make the majority of overnight trips**

This could be explained, and is consistent with, the largest percentage of visitors traveling with one or no children.

Age Distribution, Day vs. Overnight Visitors



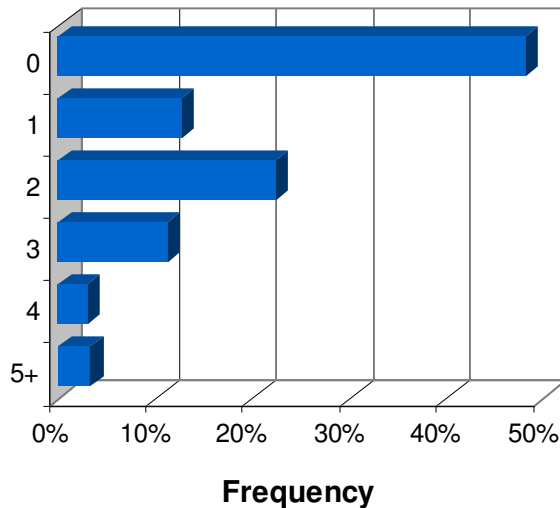
Source: Dean Runyan Associates

## Children in Household

### Nearly half of all visitors have no children at home

As most of the people traveling to Bellingham/Whatcom County tend to be older adults, more specifically above the age of 50, it is common that adults of this age are empty-nesters.

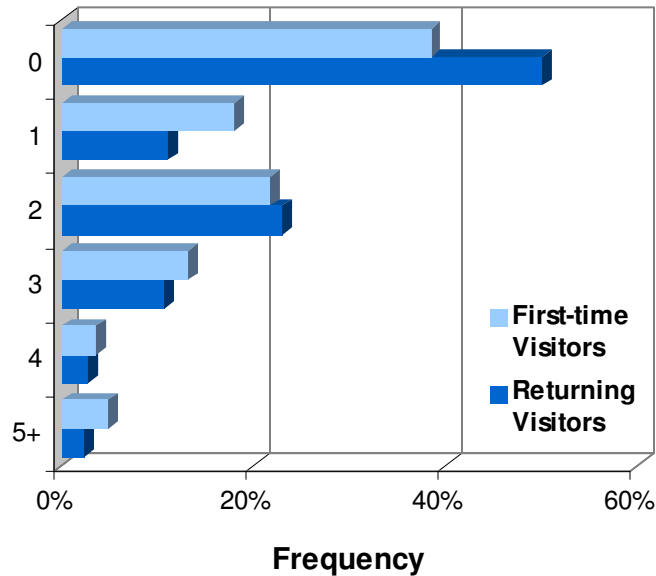
Number of Children in Household



Source: Dean Runyan Associates

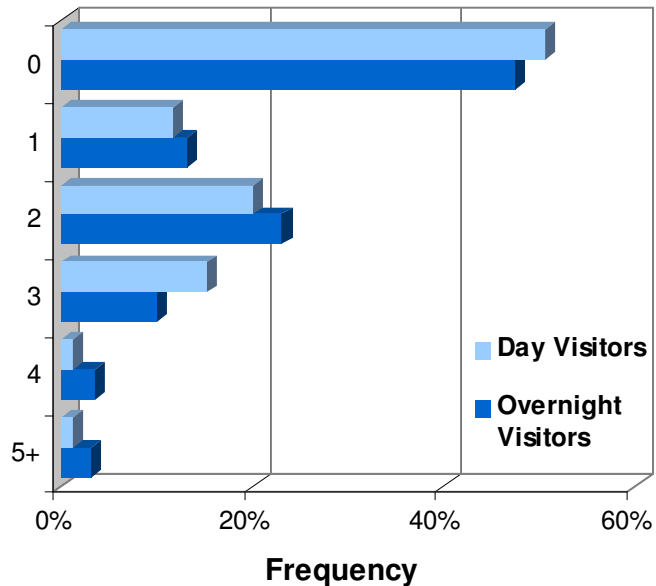
The number of visitors with children at home is consistent with number of children in the traveling party. For the most part the breakout of returning and first-time visitors is the same as that for overnight and day visitors. Though there is the general trend of not having any children at home, there is a slight variation in that for first-time visitors, the number of children they have at home is more evenly distributed. This is consistent with the fact that the majority of first-time visitors are 40 to 49 and are not yet empty-nesters.

Number of Children in Household, First-time vs. Returning Visitors



Source: Dean Runyan Associates

Number of Children in Household, Day vs. Overnight Visitors

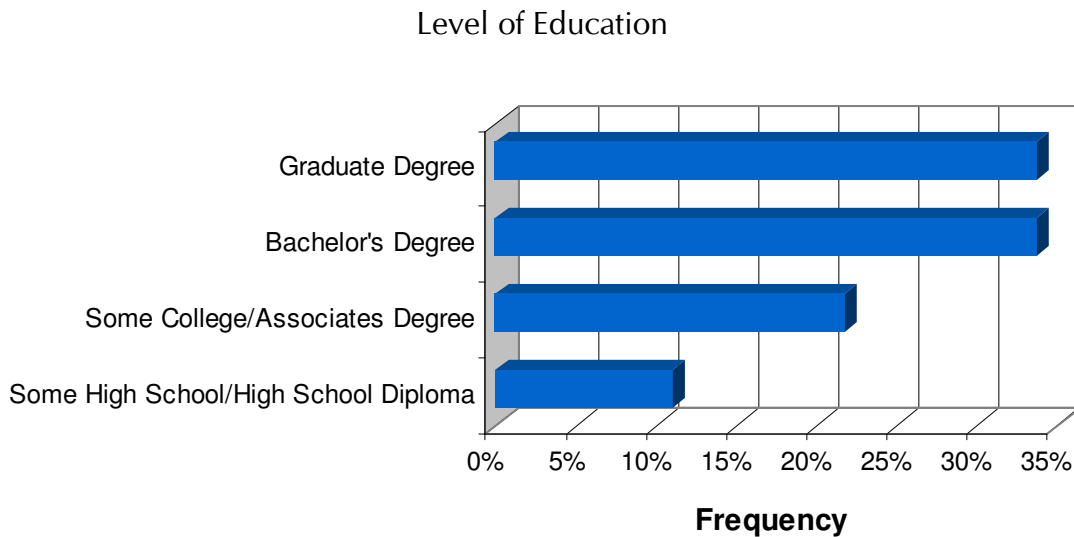


Source: Dean Runyan Associates

## Education

### Visitors to Bellingham/Whatcom County are well educated

With nearly 70% possessing a college or advanced degree, visitors to Bellingham/Whatcom County tend to have an above average level of education. This is consistent with the fact that the great majority of visitors to Bellingham/Whatcom are older adults and have had time to complete a degree, if not two.

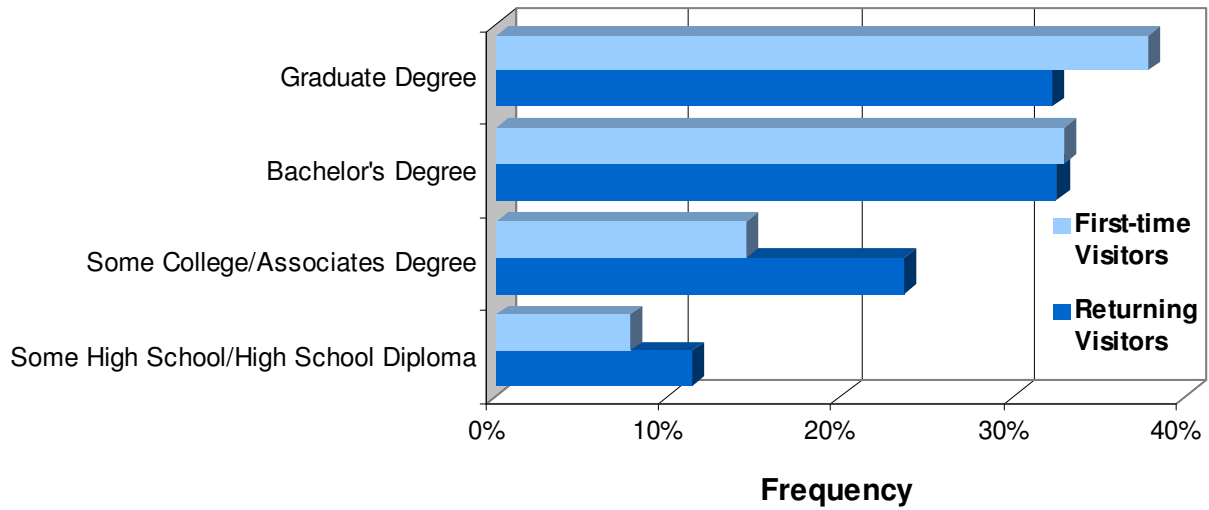


Source: Dean Runyan Associates

### The majority of first-time visitors to Bellingham/Whatcom County have graduate degrees

The higher level of education among visitors could be due, in part, to the fact that the great majority of visitors are older adults and have had time to complete their degrees. The majority of both first-time and returning visitors have at least a bachelors degree as well, and more specifically, nearly 40% of first-time visitors have graduate degrees. The breakout by day and overnight visitors follows this same trend and any variation is slight.

### Level of Education, First-time vs. Returning Visitors

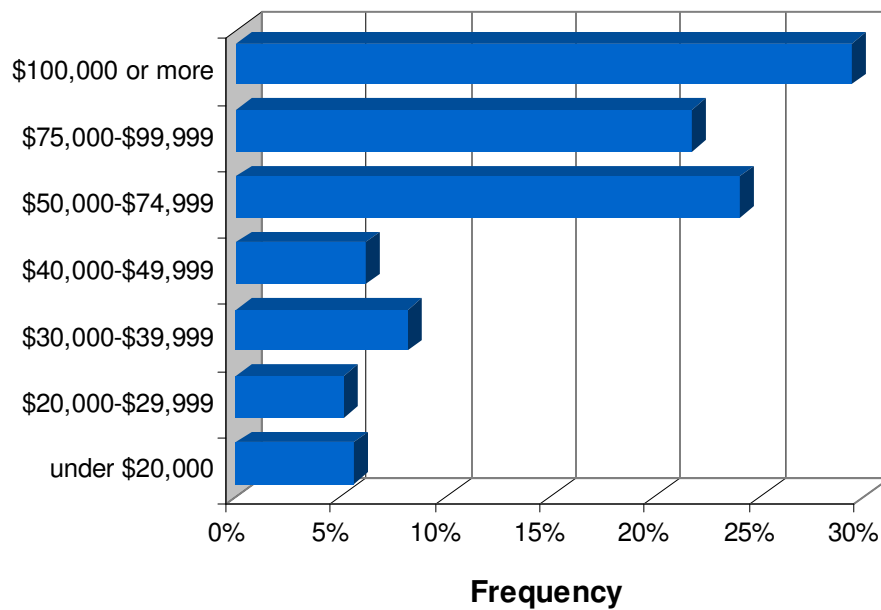


Source: Dean Runyan Associates

### The majority of Bellingham/Whatcom County visitors have fairly high incomes

Over half of all visitors make family incomes of at least \$75,000, which is consistent with their higher level of education.

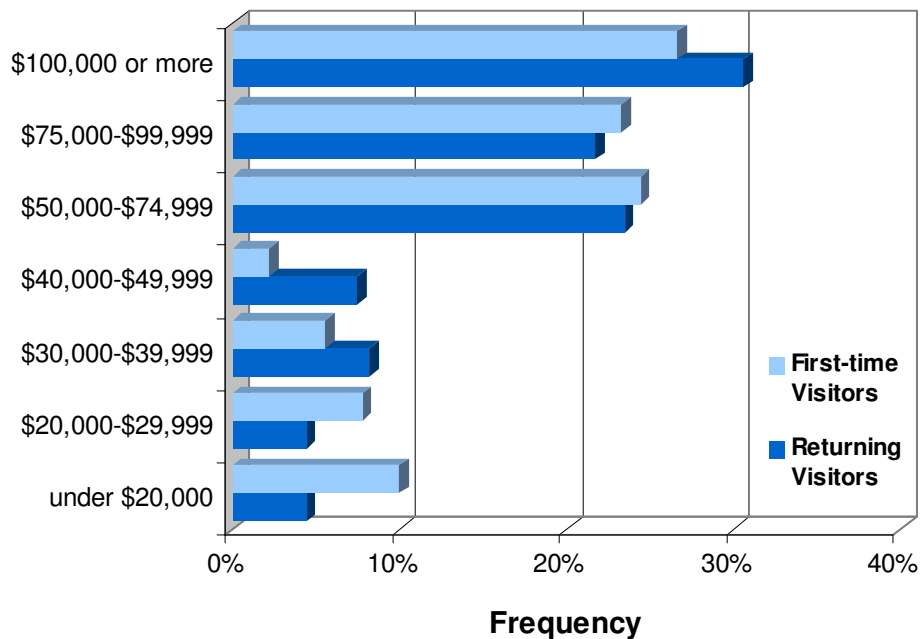
### Visitor Income



Source: Dean Runyan Associates

Whereas the majority of returning visitors have incomes of \$50,000 or more, the percentage for lower income categories decreases as the level of income decreases. This could be due to the fact that the majority of returning visitors are older adults and more likely to have a higher level of education and steady employment. First-time visitors, though the vast majority also have incomes of \$50,000 or more, as the level of income decreases, the percentage within that category actually increases. This could be explained by the fact that first-time tend to be younger in general.

Visitor Income, First-time vs. Returning Visitors

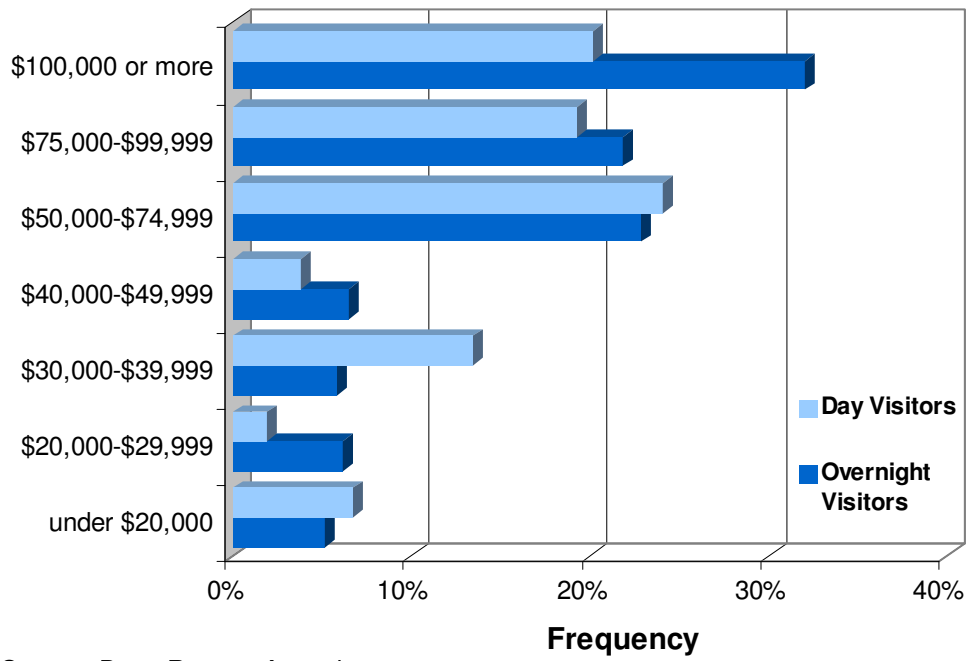


Source: Dean Runyan Associates

**For both day and overnight visitors there is a fairly large contrast between visitors making \$50,000 or more and visitors making less than \$50,000**

For day visitors the percentage of visitors is a bit more evenly distributed among salary categories whereas only a small percentage of overnight visitors make less than \$50,000 per year.

### Visitor Income, Day and Overnight Visitors



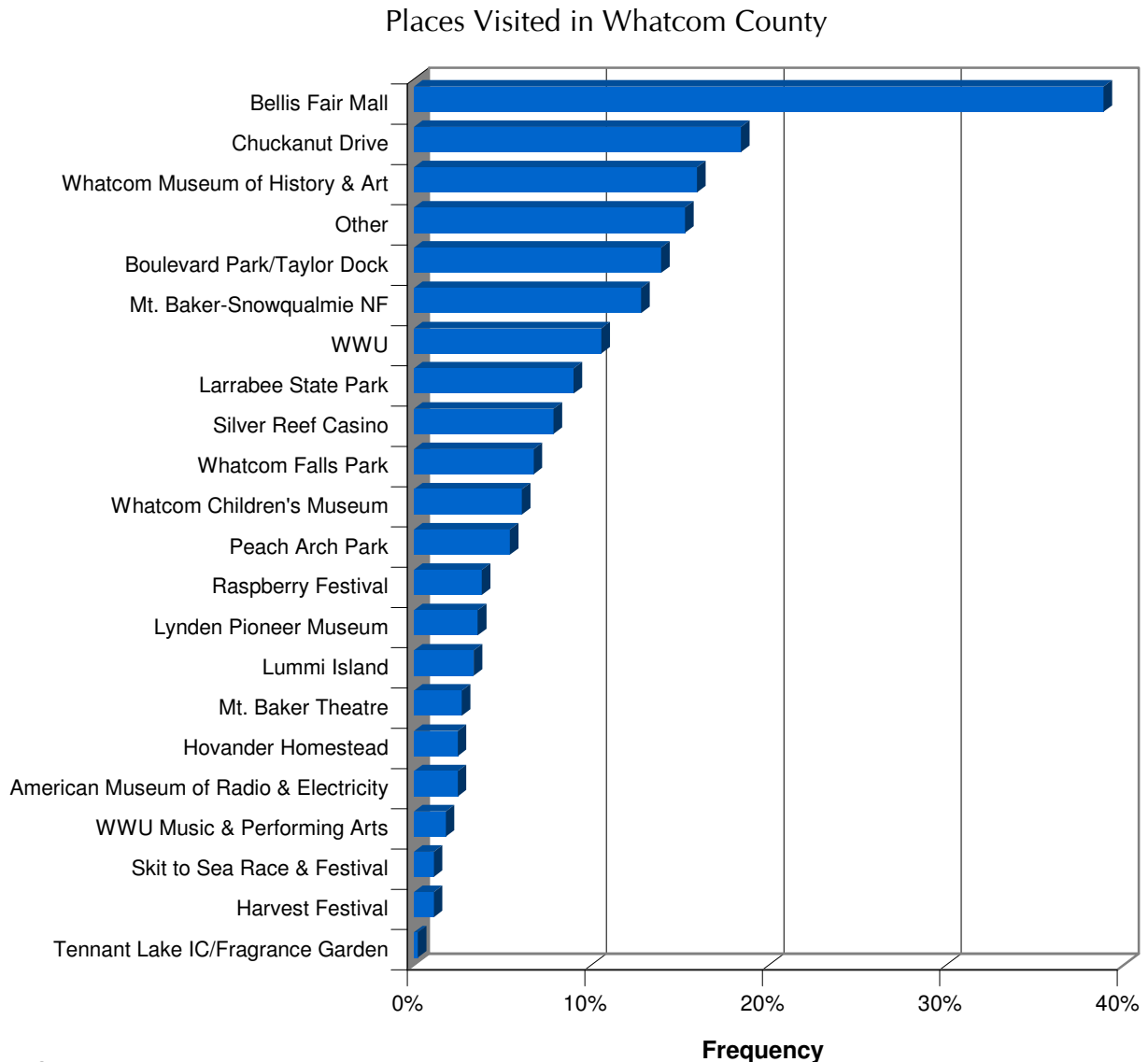
Source: Dean Runyan Associates

## V. Places, Locations, and Activities

Travel for many people involves varied motivations and itineraries that include multiple locations and activities. Understanding where people go within the County, and the primary activities in which they participate, provides valuable insight into the County’s primary strengths and sources of visitor satisfaction. Further, it is useful to analyze these factors separately for first-time and repeat visitors so as to better understand what attracts people to the area for the first time.

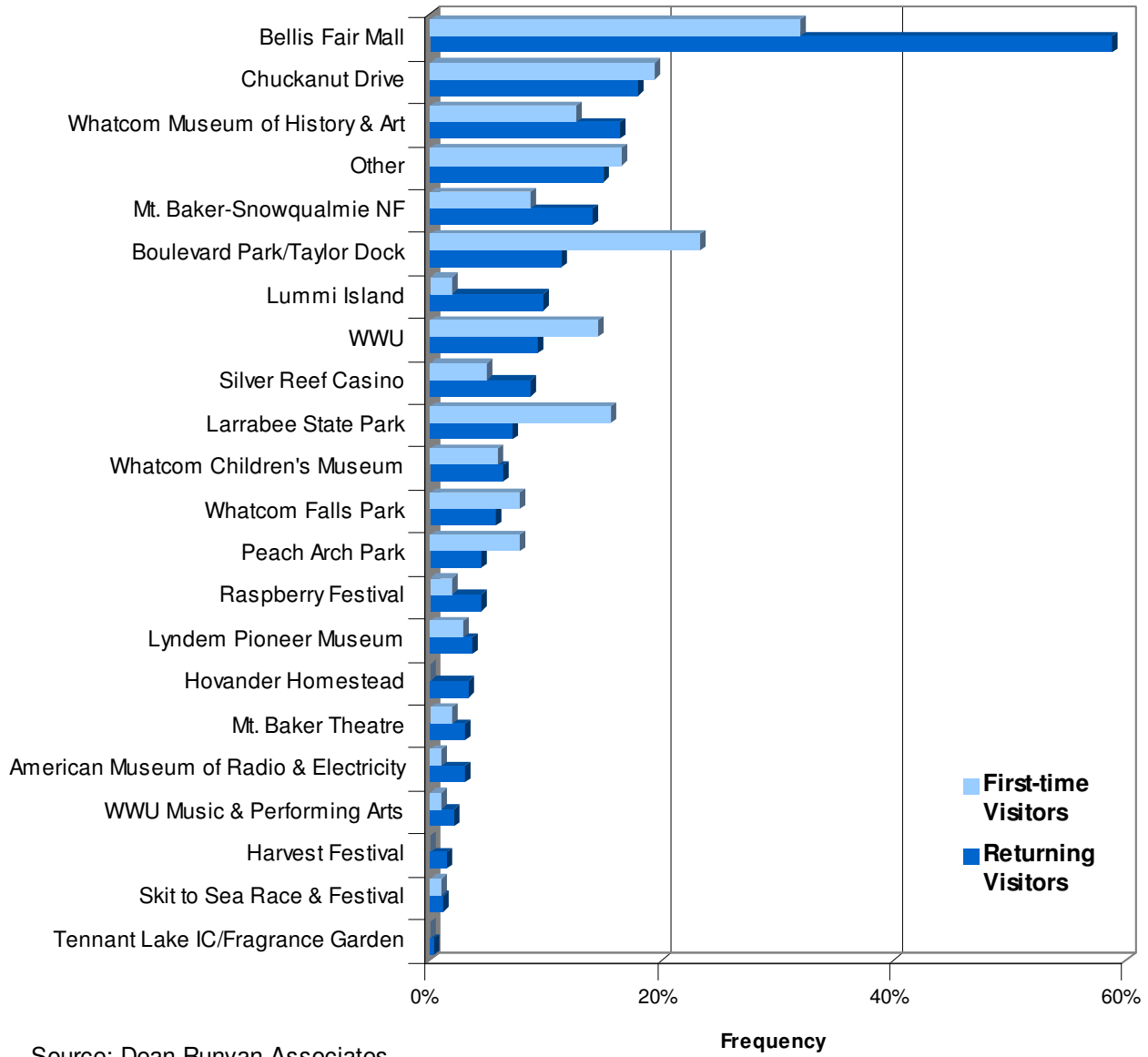
### Places Visited

Nearly 40% of all visitors to Bellingham/Whatcom County visit Bellis Fair Mall



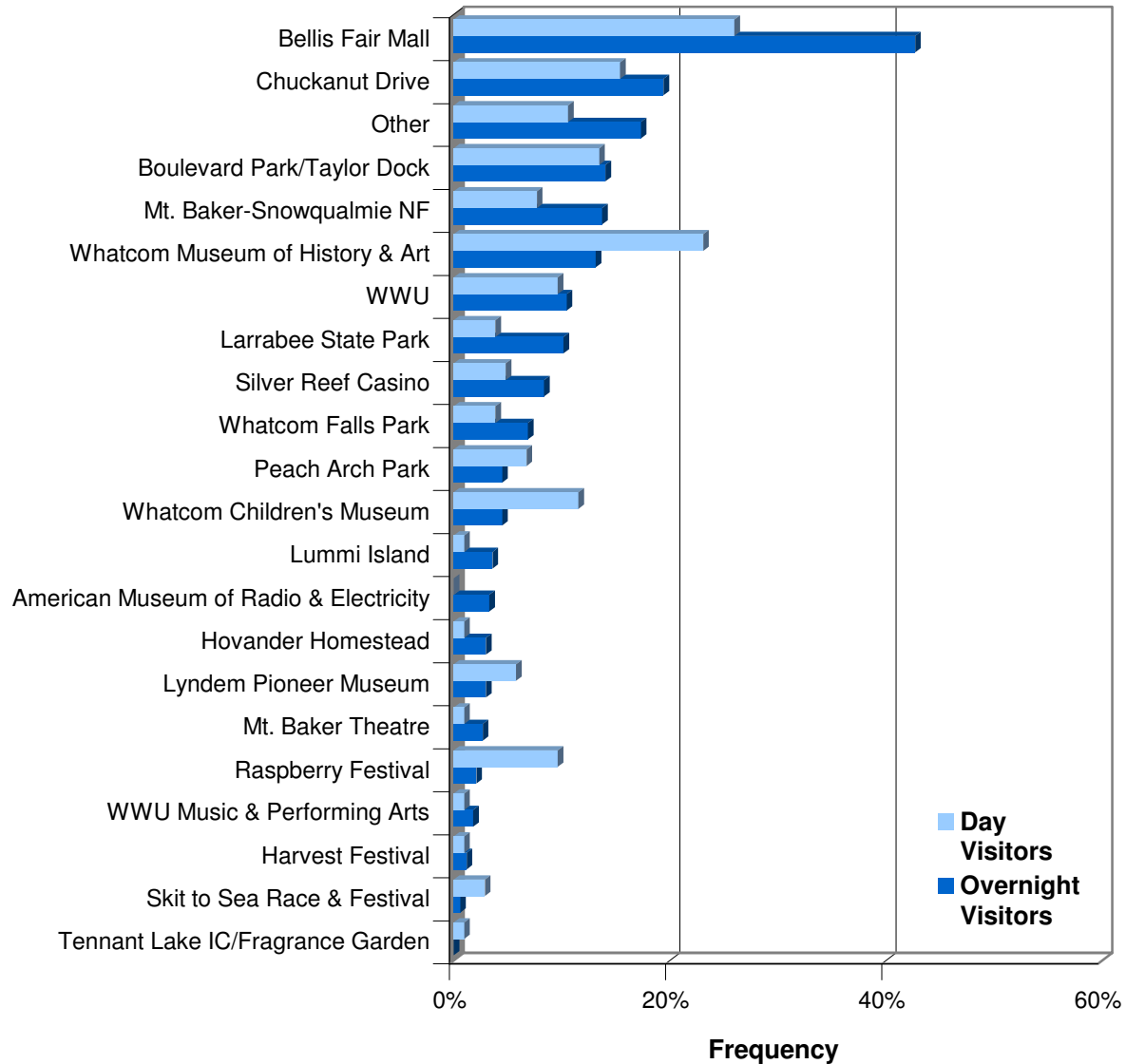
Source: Dean Runyan Associates

### Places Visited, First-time vs. Returning Visitors



Source: Dean Runyan Associates

## Places Visited, Day vs. Overnight Visitors



Source: Dean Runyan Associates

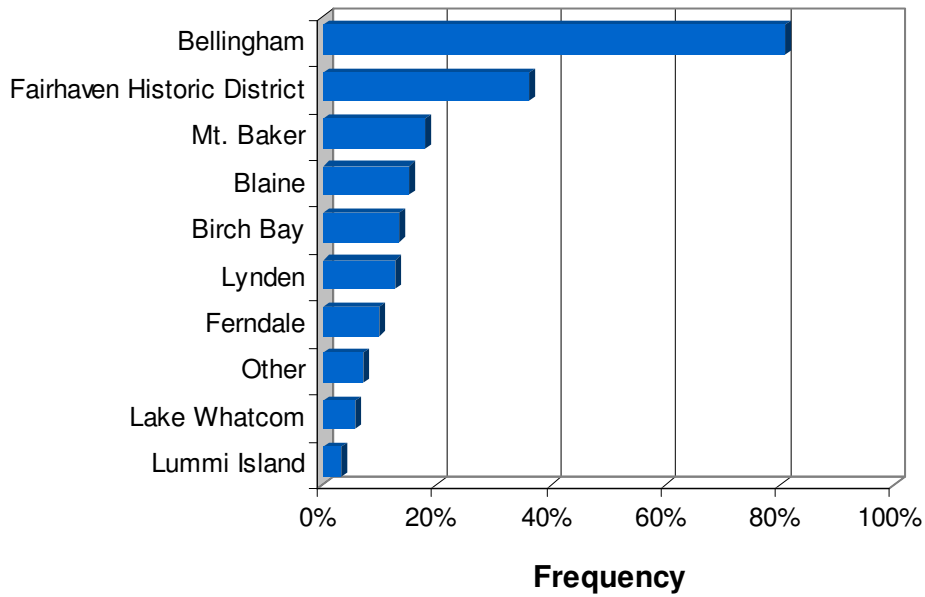
## Locations Visited

Respondents were asked to specify the locations within Whatcom County that they visited during their trip. They could specify multiple locations if they wished.

### Four out of five visitors travel through Bellingham

Bellingham is located on Interstate 5, the region's primary vehicle corridor, so a high proportion of visitors will travel to or through the community. Fairhaven, located nearby, is part of the Bellingham metro area and is also a frequent visitor destination. Mount Baker is clearly popular also, with most travel focused on the winter season.

### Locations Visited in Whatcom County

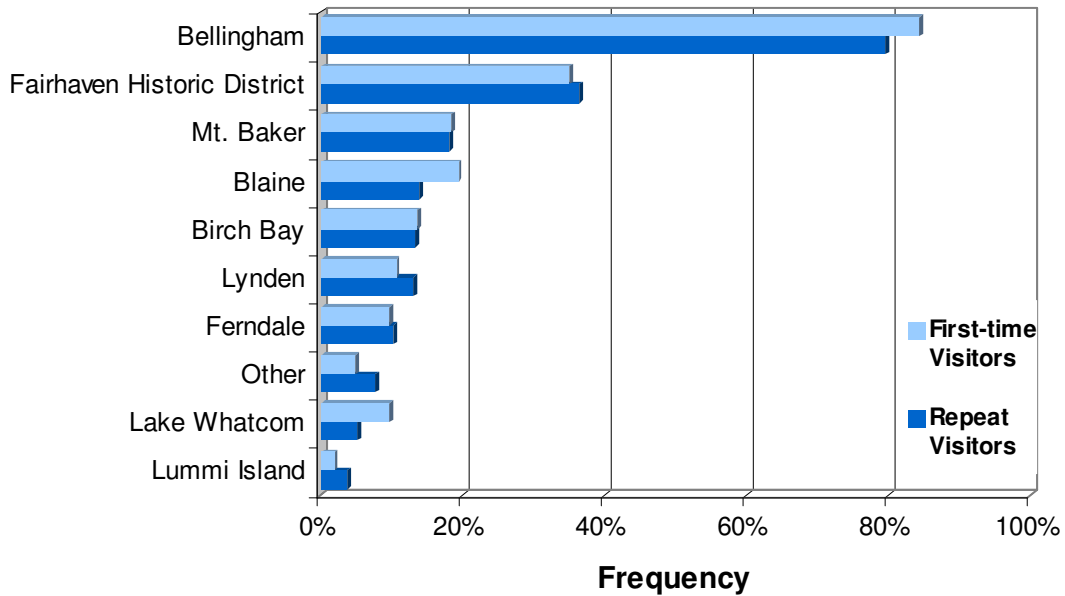


Source: Dean Runyan Associates

### First-time visitors are somewhat more likely to visit Bellingham

Bellingham is a popular destination for first time visitors in particular, although very popular for all. Fairhaven remains the second most popular location visited.

### Locations Visited in Whatcom County, First-time vs. Returning Visitors

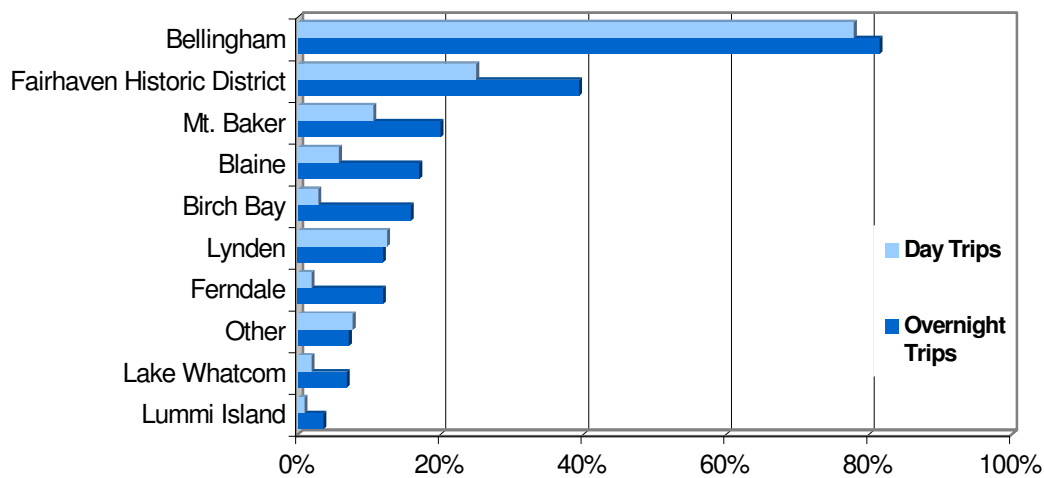


Source: Dean Runyan Associates

## Fairhaven and several smaller communities in the County are relatively more popular for overnight visitors

While Bellingham remains very popular for both day and overnight visitors, the latter are more likely to visit Fairhaven, as well as Mt. Baker and communities such as Blaine, Birch Bay and Ferndale. Overnight visitors often have a richer travel itinerary than day visitors, taking more time to travel further afield. Lynden stands out as being particularly attractive to day visitors, probably due in part to its festival activity.

Locations Visited in Whatcom County, Day vs. Overnight Visitors



Source: Dean Runyan Associates

Frequency

## Activities

Visitors to Bellingham and Whatcom County can partake in a wide variety of activities, ranging from relatively experiential, passive activities such as window shopping or sightseeing to much more specific and often active choices such as skiing, going to a concert or purchasing a whale watching tour. The first graphic below shows activity patterns for all County visitors and is followed by two others that investigate activities for repeat visitors and those who stay overnight. Respondents were allowed to indicate all activities in which they participated and commonly marked two or more categories.

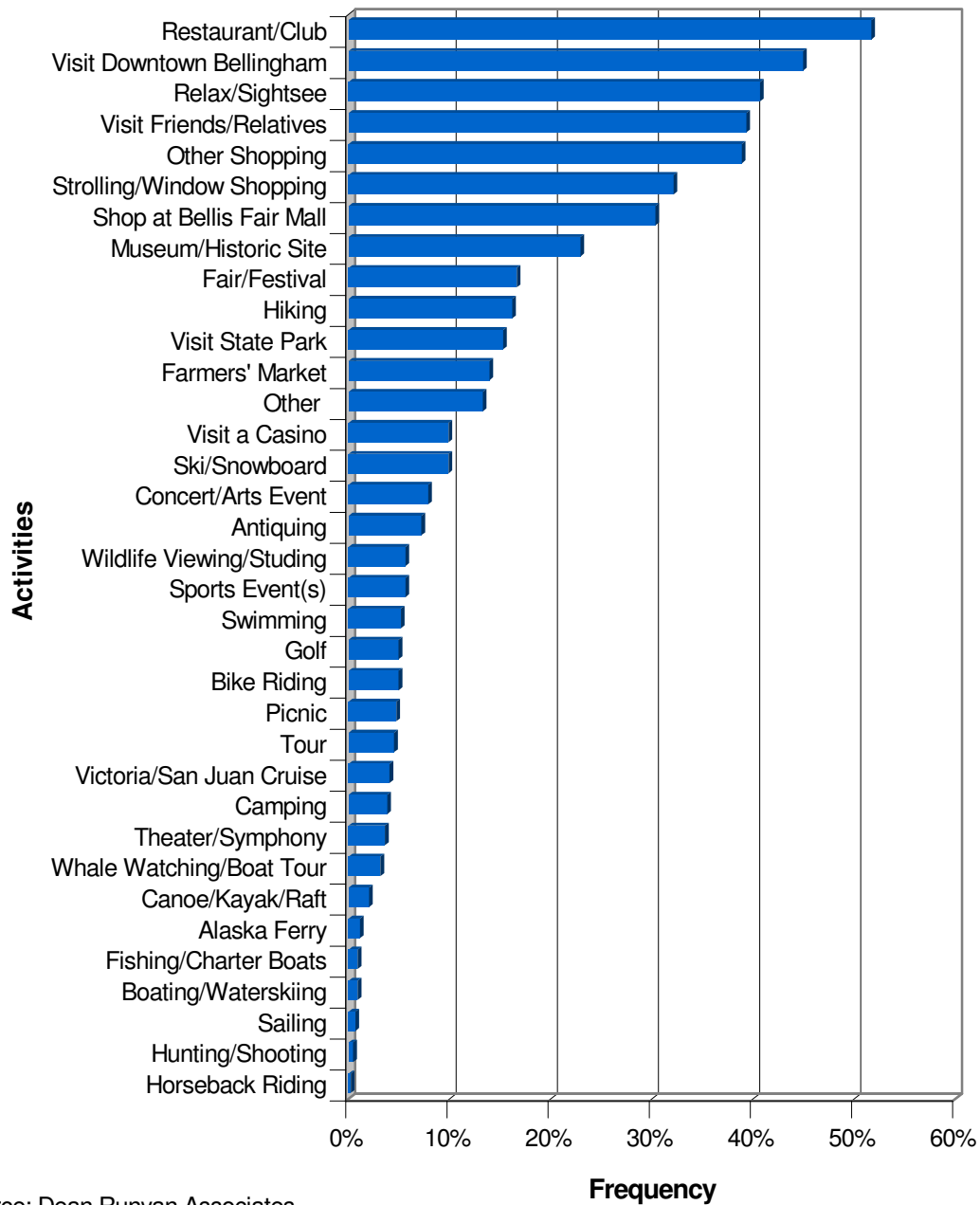
**The most common activities for Bellingham/Whatcom County visitors are in Bellingham and include going out to eat, shopping, and visiting the downtown area**

These common activities center on Downtown Bellingham and are directly related to the retail, food and other offerings of the area. Visiting with friends and relatives is also very common and presumably is combined with these downtown activities at times.

Shopping at Bellis Faire Mall is popular, as is visiting a museum or historic site, attending a fair or festival, or hiking

Other specific activities include a state or other park, the farmers market, a casino, skiing/boarding or a concert

Activities of All Whatcom County Visitors

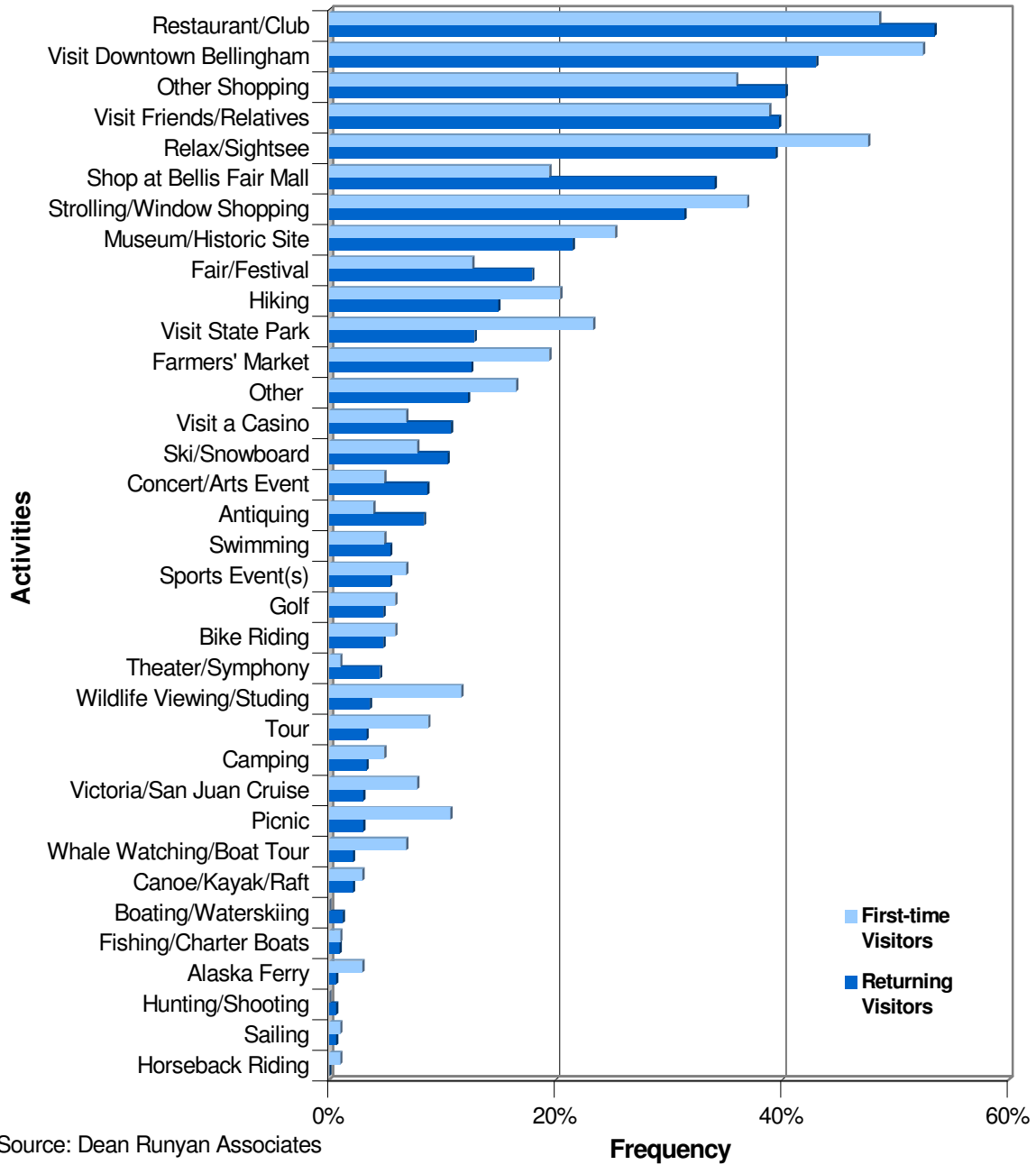


Source: Dean Runyan Associates

## Activities by First-time Visitors

Looking at the activity choices of first time visitors, versus those who are repeat visitors, helps identify the aspects of Bellingham and Whatcom County that are most effective for attracting people to the area for the first time. Conversely, looking at the activities of repeat visitors helps identify what they find most satisfying and appealing, and motivate them to return to participate in again.

Activities of Visitors, First-time vs. Returning Visitors



**First-time visitors are particularly oriented to visiting downtown Bellingham, sightseeing, and window-shopping**

The basic attributes of Bellingham itself – its retail, food, galleries and streetscape – are a primary draw for first-time visitors. These are particularly accessible attributes for most visitors and it is apparent that those visitors with little prior experience are drawn in particular to the Community itself. In this regard the community of Fairhaven clearly functions in a similar manner and, for some visitors, is considered part of the overall Bellingham area.

**Other activities that appeal particularly to first-time visitors include hiking, the state parks and the Farmers Market**

**Activities that appeal to repeat visitors in particular include shopping at Bellis Fair Mall, attending a fair or festival, or partaking in a specific recreation activity such as skiing/boarding, going to a casino or arts event, or antiquing**

It is apparent that specific activities such as outdoor sports or cultural events are often the focus of repeat visitors. These visitors are more familiar with the area and have the specific knowledge necessary to locate and participate in a more focused manner. While the overall findings show that they still often visit the downtown area, go to restaurants and shop, they also are more likely to participate in activities that are more specific.

## **Activities by Overnight Visitors**

Overnight visitors, because they are staying longer in the area, are more likely to participate in a variety of activities. Conversely, day visitors are more likely to focus on one or a few activities and to travel to a single location within the County.

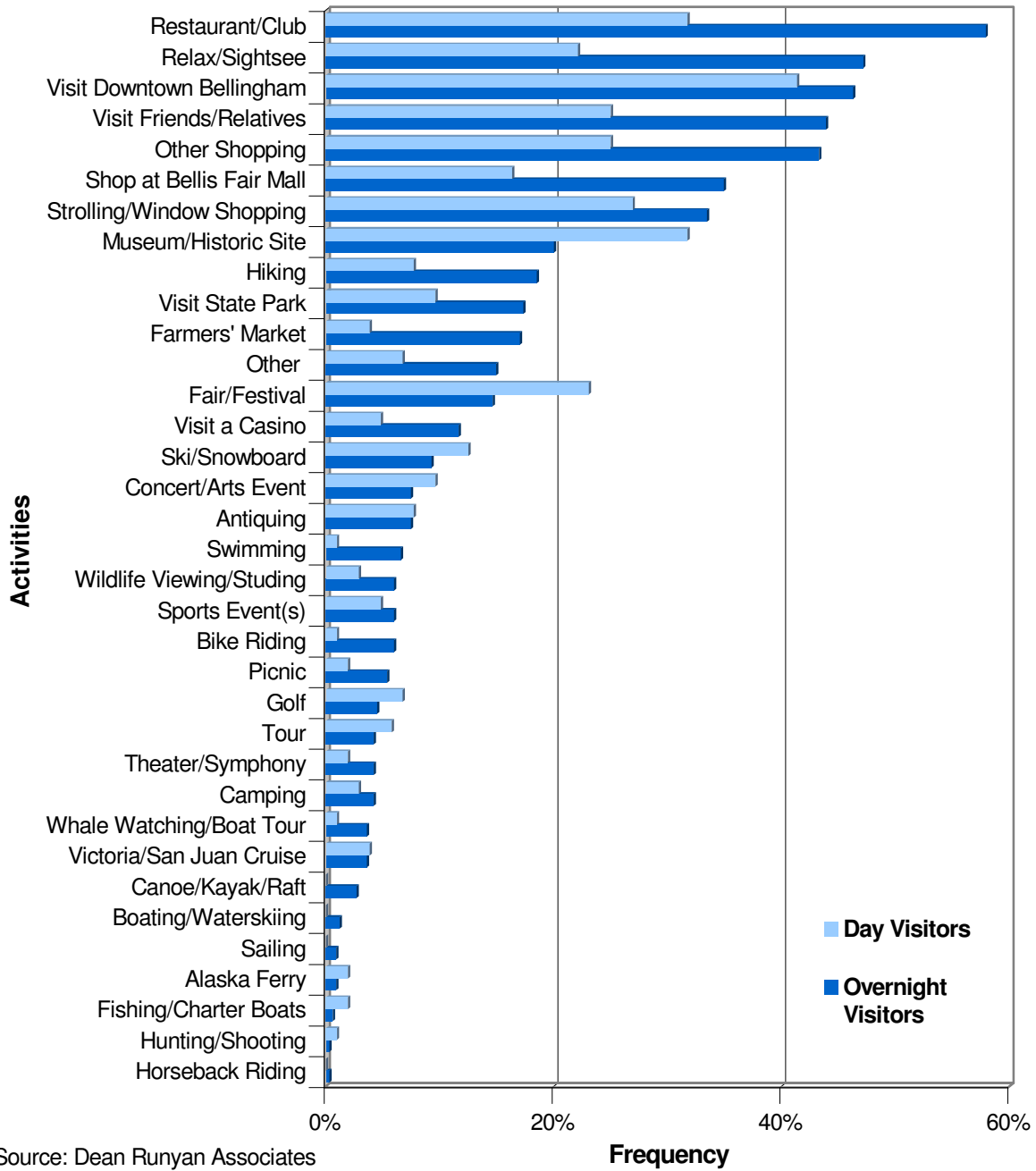
**Overnight visitors are more likely to sightsee, eat out, shop and participate in many of the County's more specific outdoor recreation and other activities**

This pattern shows how the travel itinerary of overnight visitors is typically more extensive than that of day visitors, and how they make use of commercial services and retail and hence provide relatively large economic benefits to the County's businesses.

**Day visitors are particularly attracted to museums and historic sites, fairs and festivals, concerts and arts events and skiing/boarding**

These activities are the most likely to be part of the limited itinerary of a day visitor, and probably are the primary motivation to travel to the County. Interestingly the farmers market is among the least likely to attract day visitors. The figures show, however, that many of these day visitors also visit downtown Bellingham to window-shop and sightsee and perhaps get a meal.

### Activities of Visitors, Day vs. Overnight Visitors



## VI. Attribute Ratings

Visitors to the County were asked about their opinions on a variety of attributes that typically are important to a visitor's trip experience. These attributes are valuable to analyze in concert with the information on locations visited and activities because, taken together, they offer useful insight into what is most satisfying for visitors. For this data, visitors were asked to rate Bellingham/Whatcom County on a 1 to 7 scale for each attribute. These scores are averaged for reporting, with the calculation excluding those who do not provide a score for a particular item.

### **The highest ratings are for the physical environment of the County and for the friendliness of its residents**

Residents are considered friendly and the area's parks and scenic areas, camping locations and trails get particularly high scores. There is also a high average score for how clean and quiet the area is, for its safety and security and for its wildlife. All of this, taken together, indicates that, whatever the motivation for travel to the County, visitors score the environment and residents highly. This is a very encouraging finding and suggests how important it is for the County to maintain the physical and environmental appeal for visitors as well as the positive attitudes of its residents towards visitors and the visitor and recreation industry.

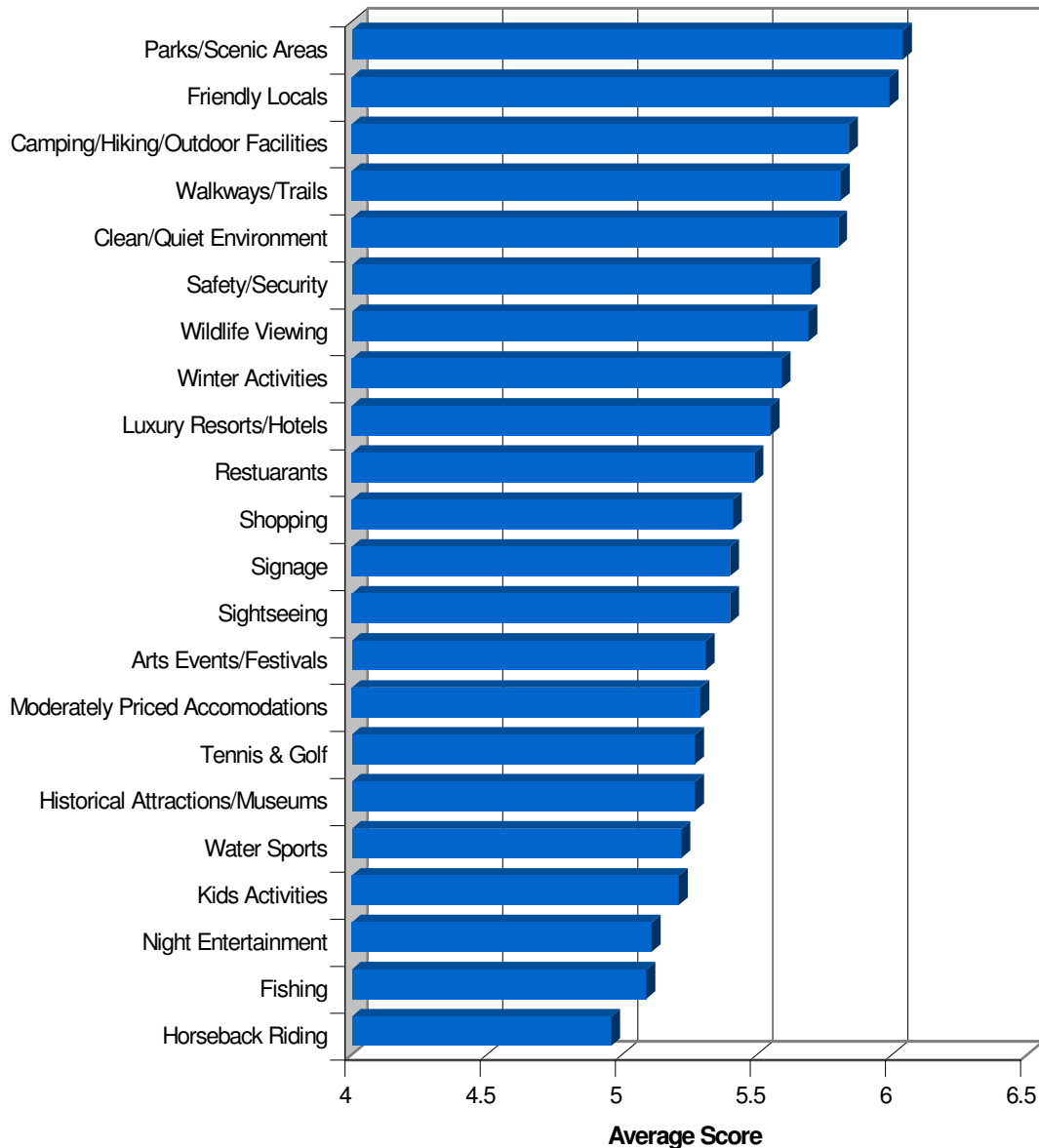
### **Categories such as dining, shopping, arts and cultural events, signage and sightseeing receive good but relatively more intermediate scores**

These average scores, while high overall, indicate that Bellingham and Whatcom County stands out less in visitors' minds with regard to its commercial and event offerings. The County competes for these visitors with many other popular visitor destinations in the Northwest – examples include Whistler, Victoria, the Olympic Peninsula, La Conner, Leavenworth, Washington's coast and a number of destinations in Oregon – and apparently the visitors do not find that these County attributes stand out as much.

### **Visitors indicate that the County stands out less with regard to children's activities, night entertainment, and fishing**

These findings indicate that some visitors probably tend to go to other destinations that are stronger in these areas, although still providing positive overall average scores for Whatcom County.

## Whatcom County Attribute Scores



Note: On a scale of 1 to 7, 1 being 'Poor' and 7 'Excellent'

Source: Dean Runyan Associates

### Day, Overnight and First-time Visitors

#### Overnight visitors in general score most County attributes higher

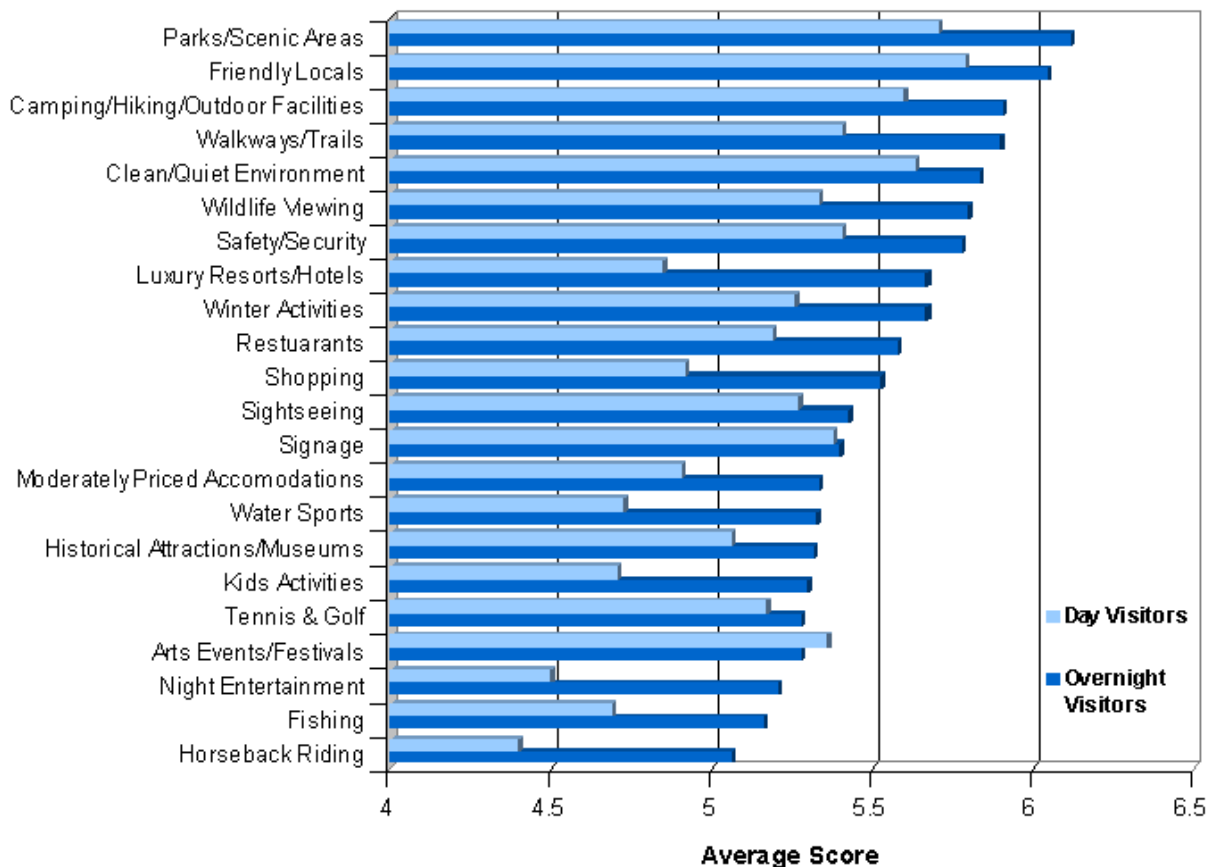
It is not surprising that overnight visitors, who have made a larger commitment to visit the county compared to day visitors, would score its attributes higher. Day visitors, who may visit primarily for a specific activity and have little other contact with the County, have a more limited basis for scoring. Overall, however, the finding is encouraging in

that the most beneficial visitors from an economic perspective, those who stay overnight, rate the County particularly high.

### Day visitors score festivals and events higher compared to overnight visitors

Day visitors appear to differ the least from overnight visitors in this regard, compared to the other attributes.

Whatcom County Attribute Scores, by Day vs. Overnight

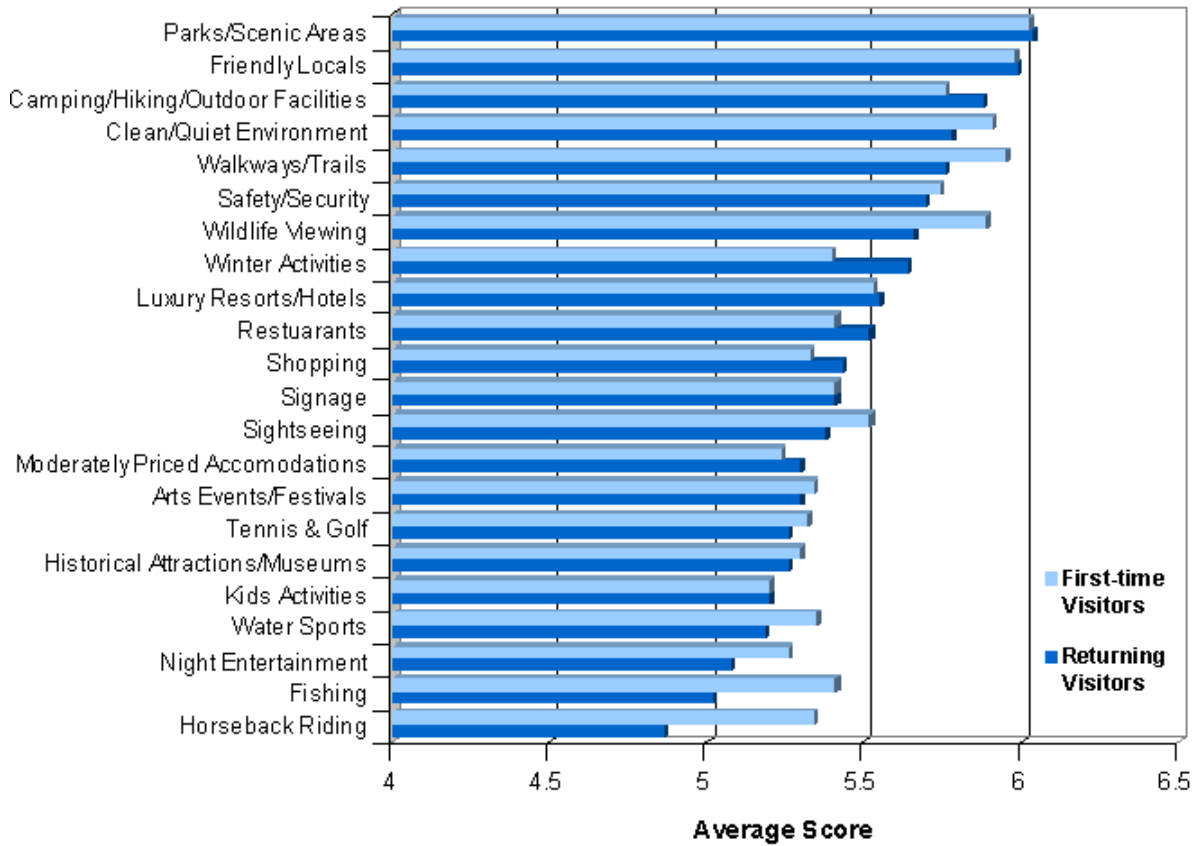


Note: On a scale of 1 to 7, 1 being 'Poor' and 7 'Excellent'  
 Source: Dean Runyan Associates

### First-time visitors rate the County similarly for many attributes compared to those who have visited previously

Trails and wildlife are rated somewhat higher for first time visitors, and returning visitors rate skiing/boarding relatively high. In most regards however, impressions of Bellingham and Whatcom County remain consistent after the first visit.

### Whatcom County Attribute Scores, First-time vs. Returning Visitors



Note: On a scale from 1 to 7, 1 being 'Poor' and 7 'Excellent'  
 Source: Dean Runyan Associates

## VII. Expenditures

Ascertaining visitor expenditures provides valuable insight into how purchases vary among different types of visitors and the variation in their purchases among different types of goods and services. The survey questionnaire asked respondents to provide their average daily expenditures for the trip they were on, reported separately for five different expenditure categories.

Gathering expenditure data in this manner is good in that respondent recall can be relatively accurate. However, none of these respondents had finished their trips yet, so the amounts are actually projections to some degree. Accordingly these figures should be used with care and not considered the most accurate measures of what visitors spend during their trip.

Expenditures vary substantially with respect to whether visitors stay overnight, as one might expect, although day visitors are not the lowest spenders. See the table below. Visitors staying in commercial lodging – hotels, motels, B&B, resorts or in rental condos – spend the most, about \$350 per visitor party per day. Lodging expenditures are the largest category of expenditures, followed by food and beverage.

Average Daily Expenditures per Visitor Party, by Type of Lodging Used

	Overnight Visitors			Day
	Hotel/Motel/ B&B	VFR/ Second Home	All Overnight	
Accommodations	131	0	102	0
Food & Beverage	79	43	64	52
Transportation	26	26	26	26
Recreation/Entertainment	53	29	43	37
Retail	63	32	56	65
	352	130	292	180

Source: Dean Runyan Associates

Visitors, who stay with friends or relatives, or in their own second home, spend substantially less, about \$130 per party per day. Food and beverage is the largest category, followed by shopping. Separate data for visitors who camp is too limited to report. All overnight visitors, which do include campers, spend an average of \$292 per party per night.

Day visitors are substantial spenders even though they do not purchase accommodations. They are particularly oriented to shopping, spending the most of any category of visitor. Recall that a number of repeat visitors are focused on shopping,

which is consistent with this finding. Day visitors also spend well on food and beverage, and show fairly good expenditures on recreation and entertainment, consistent with their tendency to visit with an event in mind

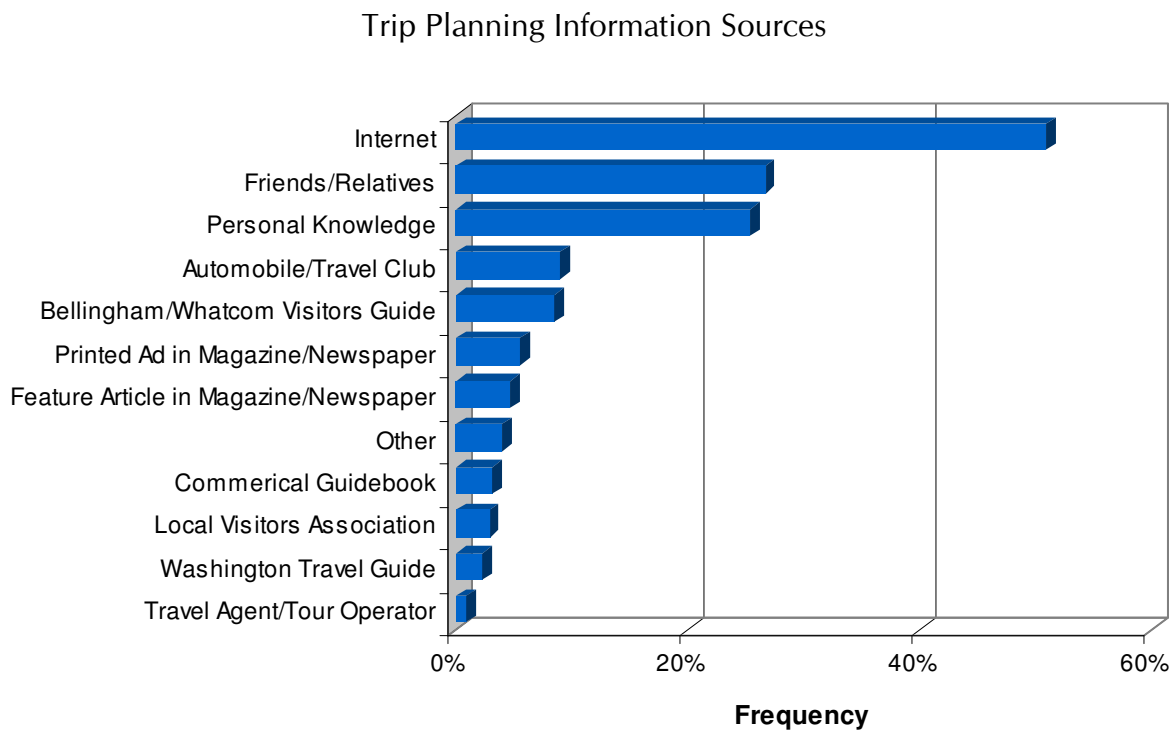
These figures were compared against other expenditure data that Dean Runyan Associates has on file for Washington and found to be suitably consistent.

## VIII. Trip Planning and Satisfaction

Information about trip planning – the use of trip planning information sources in particular – is very useful for marketing and public relations purposes. Information sources used by travelers have been changing rapidly with the proliferation of digital media, as will be evident.

**Half of visitors used the Internet as an information source for planning their trip, more than double the proportion that used other sources**

It is clear that internet-based media and equipment have become a mainstay for trip planning. The Internet as a medium is particularly valuable for relatively small and diverse businesses, as are very prominent in Whatcom County.



Source: Dean Runyan Associates

**Information from friends and relatives, and from previous trips, is also very important**

This finding illustrates the importance of one visitor passing information along to others – those who have not been to the County before as well as repeat visitors – and how important retaining visitor satisfaction is in order to take advantage of this process.

Satisfied visitors are most likely to return, and to tell their friends about their positive experiences.

**Print media are used less often for travel planning information**

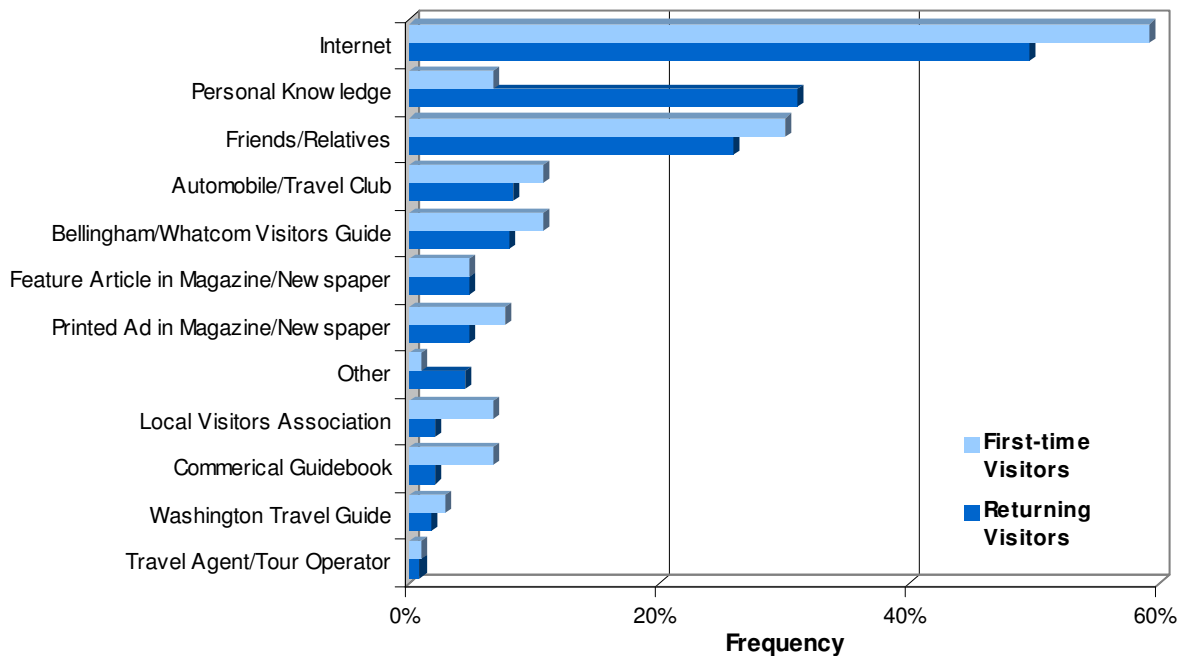
Among the print media, auto club and the County’s own Travel Guide are used the most, with other media used less frequently. Compared to the Internet all these media are used substantially less.

**First-time and Returning Visitors**

**First time visitors are particularly likely to find travel planning on the Internet, with nearly three in five reporting such use**

This finding shows how people who have not been to the County previously and accordingly have only limited personal knowledge make extensive use of the Internet. This indicates how important good Internet resources are to attracting first-time visitors. Even repeat visitors, however, commonly use the Internet for trip planning information.

Trip Planning Information Sources, First-time vs. Returning Visitors



Source: Dean Runyan Associates

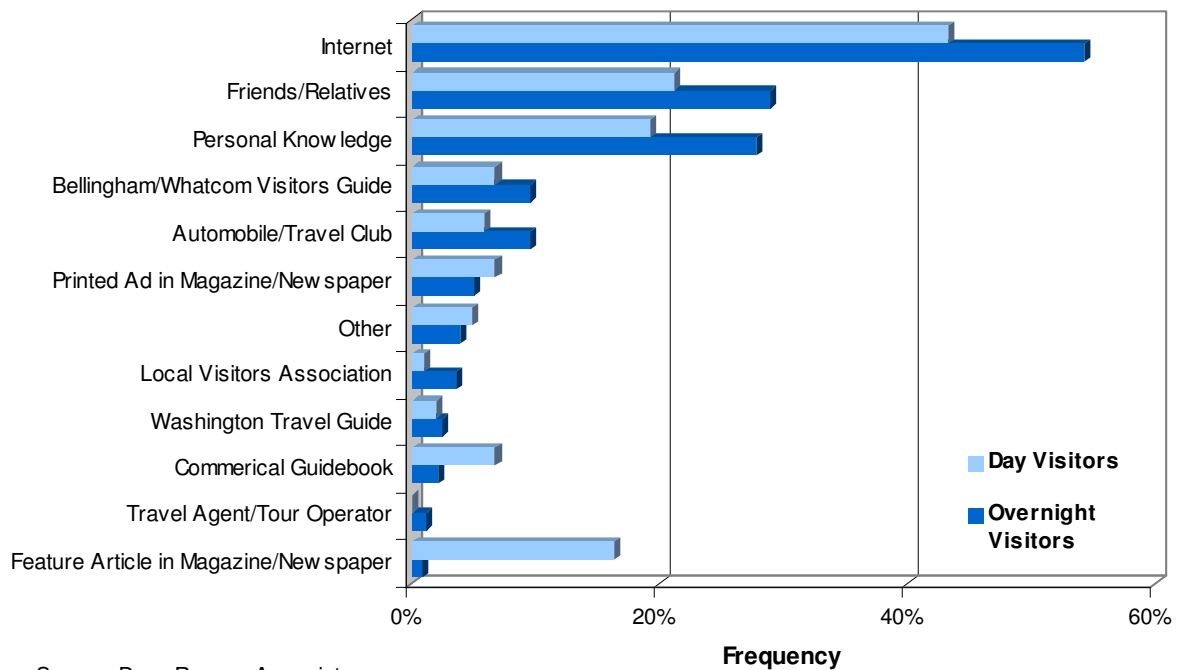
**First-time visitors also rely relatively more on information from friends and relatives as well as on many of the printed media**

First time visitors, compared to repeat visitors, make relatively more use of a variety of media, whereas repeat visitors are more likely to rely on their experience from previous trips.

### Overnight visitors use most media more than day visitors

Planning an overnight trip involves making decisions regarding the travel itinerary, lodging, food service and perhaps other matters such as recreation activities and shopping. It is not surprising that overnight visitors make relatively more use of information media across the board. It is interesting however that newspaper ads and features, along with information in commercial guides, is used relatively often by day visitors. This probably relates to the more specific itineraries of these visitors and, potentially, to their tendency to decide quickly on a visit on the basis of something they recently read.

Trip Planning Information Sources, Day vs. Overnight Visitors

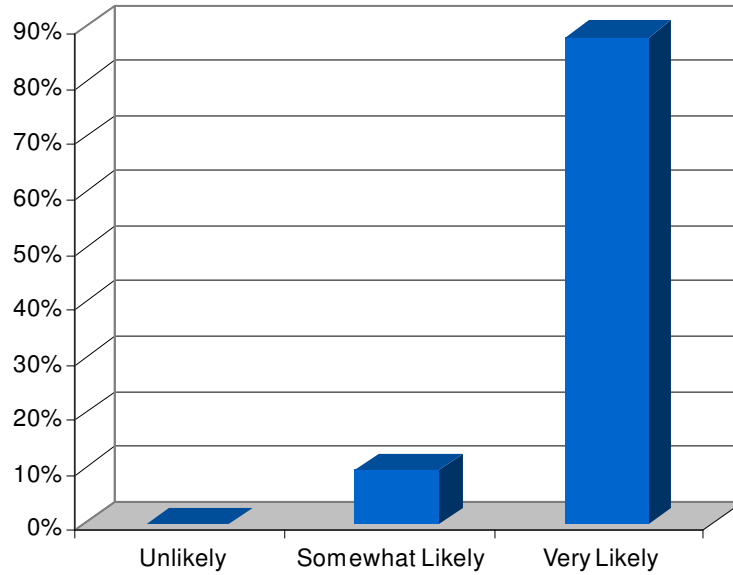


Source: Dean Runyan Associates

### Visitors are very satisfied with their trip to Bellingham and Whatcom County

Willingness to recommend Bellingham and Whatcom County as a place to visit is very high, with over 85% indicating they are "Very Likely" to do so.

### Willingness to Recommend as a Good Place to Visit

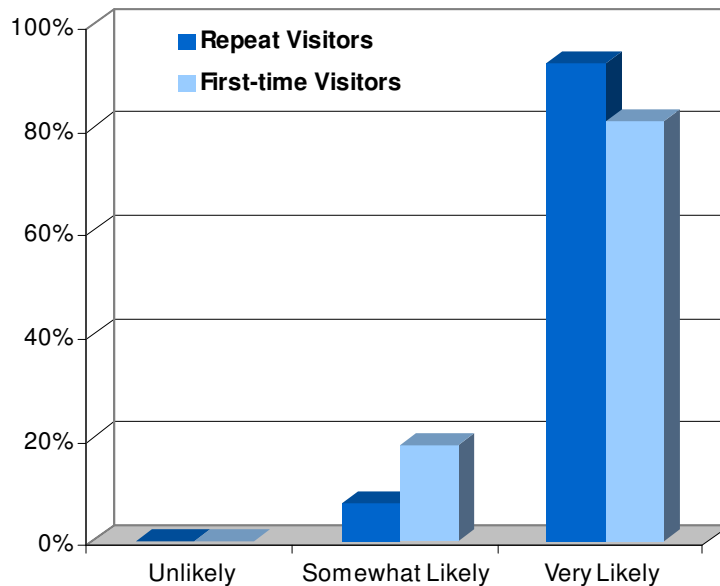


Source: Dean Runyan Associates

### Repeat visitors are the most likely to recommend the County

Repeat visitors have returned to Bellingham or Whatcom county at least once and it is not surprising that they are relatively satisfied with the area. The high average score of first-time visitors, however, is encouraging.

### Willingness to Recommend as a Good Place to Visit, by Repeat Visitation



Source: Dean Runyan Associates

## IX. Interpretation and Recommendations

The following are some primary findings from the research. A listing of other, more specific findings follows.

### **Markets relatively close by are the most important sources of visitors**

Visitors from the Seattle Metropolitan Area are particularly prominent, following by visitors from the Vancouver Metropolitan Area. Access to Whatcom County is much easier from these two locations than from more distant regions or and/or regions to the east, primarily due to the significance of Interstate 5 as a travel corridor. Drawing visitors from these areas will always be relatively easy, particularly given the limited nature of the marketing budgets available to most entities in the County.

This is not to say, however, that certain more distant markets are not worth consideration. The findings illustrate the wide range of experiences and activities that Bellingham and Whatcom County offer and how certain visitors are oriented to specific locations and activities. Unique and high quality attributes – which in Whatcom County are often outdoor recreation resources – can draw from distant markets. Examples are whale watching, skiing/snowboarding, hiking/camping and events associated with Western Washington University. The draw for these visitors, in terms of volume, will not be as large as to downtown Bellingham and Fairhaven, but can be significant, particularly for the County's outlying areas and specialized recreation businesses.

### **The ambiance of downtown Bellingham and Fairhaven is a particularly important draw**

Visitors of all types are drawn to these urban locations. Many first-time visitors head downtown, and a high proportion of visitors overall say they shop there, go to restaurants, window shop, or just sightsee.

It behooves Bellingham and Fairhaven to maintain their emphasis on downtown preservation and enhancement, including historic building renovation, business development and retention, parking, signing and streetscape enhancement. A similar emphasis in the smaller communities in Whatcom County is also advisable, particularly those on the coast.

### **Making good use of the Internet is crucial for reaching all categories of visitors**

Readily available information on the Internet promoting the County's many activities and unique attributes is essential. The Internet as a means of communication and information is not only the easiest and fastest way to distribute information, but more and more it is becoming the preferred informational source by all demographics. As most visitors to Bellingham/Whatcom County travel from surrounding areas, the Internet

will prove to be an invaluable, and necessary, tool for reaching out-of-state and foreign visitors.

### **Visitors are well-educated with good incomes, and most are middle age or older**

A substantial portion of visitors to Bellingham/Whatcom County is well educated and has good incomes. The County is very fortunate to be attracting visitors of this type, and, because so many are repeat visitors, they appear well satisfied. Because this group also tends to be beneficial economically, any further appeal to this demographic will be very desirable.

The findings suggest a few possible approaches. Several attributes appear important for such visitors but not scored especially high for the County, in particular shopping, dining and museums/galleries. These are very important attractions and services, but appear not to stand out for visitors as much as the natural environment. In this regard it is useful to scan the comments in Appendix B that respondents wrote as their two-word description of Bellingham and Whatcom County. Lodging is another important visitor service that is scored well but for which the County does not seem particularly notable among its visitors.

Other more specific findings include:

- The County is very well situated with respect to population concentrations in Washington, and can continue to benefit from a growing number of well-educated people and an affluent population in the Seattle Metropolitan Area– the largest and most active market in the Northwest and an internationally–recognized visitor destination
- The County will benefit from direct access via Interstate-5 from both the Puget Sound Area and from Vancouver, B.C., the largest market in western Canada
- The County has several important attractions attributes, primarily coastal communities that offer water access for recreation activities, high-quality outdoor recreation opportunities in mountain areas, a number of appealing small communities, and abundant wildlife and scenery
- Retirement-age residents of the Northwest are an increasing proportion of the market
- Overnight travel to Bellingham and Whatcom County is common, but trips are most often fairly short
- Many travel parties do not include children
- Travel from Canada to the U.S. could represent a more important factor in the years ahead, depending on exchange rate and border crossing issues

- The most common comments about positive attributes of Bellingham and Whatcom County refer to natural beauty, peace and quiet, and other aspects of the natural environment
- Overall visitors are very satisfied with their trip to Whatcom County

# Appendix A

## Visitor Survey Methodology

In order to contact and gather data from as representative a sample of Bellingham and Whatcom County visitors as possible the project involved conducting a phased, stratified intercept survey, fielded largely during 2009.

### Sampling

Prior to conducting the survey a number of sites were selected throughout the County that could serve as intercept locations. These sites were discussed with BWCT staff and a selection made of those that seemed most suitable for each season and for contacting as representative a sample of visitors as would be feasible. Intercepts were to be made throughout the year – stratified into four seasonal periods – and at locations within Bellingham as well as at community and rural locations elsewhere in the County. The locations used for the survey, and the number of completed questionnaires associated with each, appear in Table A-1.

In addition a self-administered questionnaire was prepared and reviewed with BWCT staff, then duplicated for use during the year. Respondents were asked to complete and return the questionnaire at the time of the intercept. Only visitors to the County were provided a copy of the questionnaire to complete. A copy of the questionnaire appears below.

### Fielding

Fieldwork was completed by BWCT staff and volunteers. Staff intercepted a sample of people at each location, asking a screening question of whether they were visitors to the County. Visitors were then asked to complete the questionnaire, and completed questionnaires were gathered from those who were willing to participate. During the course of the survey a total of 2,380 people were contacted, 53% percent of which were visitors. Of visitors who were asked to complete a questionnaire, 40% complied. A total of 444 questionnaires were available for analysis, each representing an intercepted visitor party.

### Verification and Weighting

Before the survey data analysis was undertaken a check was made on how well the completed questionnaires represent the seasonal variation in visitors to the County. Lodging receipts data for each month were used as a measure of seasonal variation in visitor traffic, as appear in the first data column of Table A-2. Months are aggregated to represent four primary seasons. The distribution of lodging tax revenue for these four seasons appears in the second data column. Because two seasons were not represented as well as is desired, weights were calculated, as appear in the third column of the data table,

and applied to all subsequent data analysis. In this manner the data represent, to the best degree possible, the known seasonal variation of visitors to Whatcom County.

An additional preliminary analysis was made of whether the choice of intercept sites resulted in unacceptable bias in the survey data, suggesting that additional weighting may be necessary. Inspection of the distributions of a range of visitor characteristic and visit pattern variables indicated that no undue biases appeared to be present in the data and accordingly no additional weighting was necessary.

## Appendix B

### Respondent Comments

Accessible, quaint	Beautiful, wet
Accommodating	Beautiful, clean
Again in the summer	Beauty, relaxing
Aging hippiedom	Bella vista
Alaska gateway	Bit expensive
Alive and scenic	Breathing air
Always pleasing	Busy, clean
Amazing views	Busy, clean
Artsy, peaceful	Calmly entertaining
Attractive town	Charming area
Awesome outdoors	Charming diverse
Beautiful	Charming, historic
Beautiful	Charming, interesting
Beautiful and inviting	Charming, scenic
Beautiful and gorgeous	Clean air
Beautiful and peaceful	Clean friendly
Beautiful and relaxing	Clean friendly
Beautiful and relaxing	Clean, friendly
Beautiful city	Clean green
Beautiful community	Clear
Beautiful, friendly	Clear
Beautiful, friendly	College town
Beautiful, friendly	College town
Beautiful, friendly	College town
Beautiful, friendly	College town
Beautiful good	Comfortable, relaxing
Beautiful location	Comfortable, fun
Beautiful location	Coming back
Beautiful paradise	Convenient location
Beautiful, quiet	Cool place
Beautiful, relaxing	Country cottage
Beautiful scenery	Definitely breathtaking
Beautiful scenery	Delightful, beautiful scenic views
Beautiful, scenic	Easily accessible and nicely restored and green and clean
Beautiful setting	Eco-friendly
Beautiful, scenic	Environmentally friendly
Beautiful, liberal	Excellent shopping
Beautiful, outdoorsy	Exciting, nature-friendly
Beautiful, peaceful waterfront	Extremely beautiful
Beautiful, quaint	

Eye candy  
F-ing sweet  
Fabulous  
Fairhaven -lovely!  
Family friendly  
Family heritage  
Faster pace  
Four seasons  
Fresh, open  
Friendly, hospitable  
Friendly and quiet  
Friendly and green  
Friendly and natural  
Friendly clean  
Friendly people  
Friendly people (very important!)  
Friendly place  
Friendly staff  
Friendly, accommodations  
Friendly, quiet  
Friends, future  
Fun  
Fun, fun  
Fun and games  
Fun place  
Fun town  
Fun trip  
Fun, artsy  
Good-looking  
Good golf  
Good golf  
Good skiing  
Good, wonderful  
Great  
Great  
Great city!  
Great college  
Great cycling  
Great experience  
Great fun  
Great getaway  
Great place  
Great place  
Great place  
Great place  
Great shopping

Great town  
Great views  
Has everything  
Hippie town  
Hippie town  
Hippies  
Hippy, fun  
Historic, beauty  
Historic, clean  
Historic, interesting  
Historical & scenic  
Info- center excellent  
Inspiring beauty  
Interesting places  
Interesting, charming  
Interesting, pretty  
Interesting, enjoyable  
It rocks, plan on returning soon  
It's ok  
Just beautiful  
Just right  
Laid back  
Laid back  
Liberal, outdoors  
Light-catcher  
Local flavor  
Love it  
Love it  
Love it  
Love shopping  
Love the city  
Lovely place  
Lovely city  
Lovely place  
Lovely place  
Lovely place, friendly, eco-friendly town  
Lovely safe  
Lovely place  
Most excellent  
Mount Baker  
Mountains, bay  
Natural Beauty  
Naturally Enjoyable  
Need to have sign at turn for Kensington  
Ferry where road from Burlington off  
Hwy 5.

Nice city	Relaxing retreat.
Nice college town with a nice downtown	Relaxing, Fairhaven
Nice people	Relaxing, friendly
Nice place	Relaxing, peaceful
Nice place	Relaxing.
Nice place	Right size
Nice place	Rockin', awesome
Nice place	Rustic
Nice place	Sailing skiing excellent
Nice place	Scenic and historic
Nice relaxed environment	Scenic beauty
Nice town	Scenic fresh
Nice town	Scenic friendly
Northern Jewel!	Scenic value
Not welcoming, but I still like it	Scenic wonder
Oh ya!	Scenic, beautiful
Old town	Scenic, cold
Old, intriguing	Sea views
Open Green	Semiahmoo-therapeutic, eye candy
Outdoor playground	Serene and warm
Overpriced homes	Simply beautiful
Peaceful by the water	Simply magnificent! Lots to do! We will be back again for a longer stay. We were in the area for a wedding and drove up here just for fun". Wow!"
Peaceful, fun	Simply refreshing
Peaceful, entertaining	Small, beautiful
Peaceful, beautiful	Small town
Peaceful, relaxing	Strong Community
Peaceful, serenity	Stunningly beautiful
Peacefully beautiful	Subdued excitement
Perfect stay	Sunny and pretty
Picturesque, serene	Surprising, beautiful
Pleasant place	Sweet, quaint
Pleasant, peaceful	The history
Police state	Verdantly rainy
Pretty landscapes	Very appealing
Pretty nice	Very beautiful
Progressive city	Very beautiful
Quaint	Very beautiful
Quaint, quiet, scenic	Very beautiful
Quaint, fun	Very beautiful
Quiet & relaxing	Very beautiful
Quiet, human friendly	Very beautiful
Quiet port	Very beautiful
Quiet, relaxing	Very beautiful
Quiet, scenic.	Very beautiful
Relaxed town	Very beautiful
Relaxing and awesome	Very charming

Very enjoyable  
Very friendly  
Very friendly  
Very friendly  
Very friendly  
Very good  
Very good  
Very good  
Very good  
Very interesting  
Very liberal  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice  
Very nice city  
Very nice  
Very pleasant  
Very pleasant  
Very pretty  
Very relaxing  
Very relaxing  
Very relaxing  
Very relaxing  
Very comfortable  
Vintage, pedestrian  
Visitor center  
Want to live here  
Warm, beautiful  
Warm, friendly  
Water, mountains  
Weekend escape  
Welcoming and peaceful  
Welcoming, breathtaking  
Wet  
Wonderful  
Wonderful, nice view

## Appendix C

### Respondent Suggestions

2-day specials on accommodations  
A boardwalk (shops along the water)  
A grandchild  
Absolutely nothing  
Add Disneyland  
Advertise as great tourist/cultural destination.  
Advertise Fairhaven as a shopping district  
Advertise hiking trails in the Whatcom County area  
Advertise more community events better. It's hard to hear about them when you're out of town. And a lot of locals don't know what events are happening  
Advertise website with info  
All it needs is more sunshine  
Already visit frequently  
At Par  
Atmosphere  
Attractions, sightseeing, camping world, quilting stores  
Beautiful, simply beautiful  
Better bus service to Birch Bay  
Better directions?  
Better hotel promotions for rooms  
Better parking  
Better parking/traffic control  
Better road maps  
Better streets (maintenance and cleanliness) fewer homeless  
Better weather  
Better weather more often  
Better weather or more indoor options  
Better weather, more nightlife-live, more accommodations at Mt. Baker ski area or nearby entertainment  
Botanical or Tour type gardens.  
Bring more goods back for 1 day of shopping  
Can't think of anything...maybe free parking?  
Change the one-way streets  
Cheaper flights from major cities to Seattle  
Cheaper lift tickets, cheaper accommodation packages for weekend  
Church, brochure  
Clean up downtown  
Control development  
Discount packages  
Discounts for WA state residents for lodging  
Discounts, better taxi service

Disneyworld/Rainy Day Specials such as our stay  
Don't become like whistler! Keep the Forest Park  
Don't charge for parking downtown Bellingham, we had no quarters & wanted to shop  
but we left instead.  
Draw our name  
Easy bike trails eagle refuge needs better signs  
Enjoyed the stay-no changes for us-will return  
Everything  
Extend the bike trail up Mt. Baker Highway  
Free Bicycle Rentals!!!  
Free coffee is a good start  
Free nights, or store coupons  
Free Parking  
Free Parking  
Free Parking  
Friends Fairhaven  
Give better deal to Canadians in Mt. Baker  
Give me more coupons  
Good as it is! We visit every 6 weeks or so!  
Great as is! We love coming here  
Great place to visit  
Great place very friendly  
Have a bed and breakfast that wasn't upscale  
Historical architecture tour  
Hotel deals  
I was here on business. I will return on business but I would like to stay an extra few  
days to explore.  
I will be back. I love it here.  
If you paved the gravel portion of south bay trail road bikes like mine could use it  
I'm here on business for NOAA  
Improve lodging, very dirty, uncomfortable rentals.  
Information boards at the historic buildings, tourist board/desk at village green in  
Fairhaven, information conservation, eco-tours  
It is fine the way it is. Bellis Fair was busier this time than 20 years ago. I liked that  
It is perfect!  
It's fine  
It's Great  
It's great as it is...  
Its perfect the way it is.  
Keep clock museums open on weekends  
Keep the clock museum always open  
Keep up on the signs on the roads. It's hard to read them.  
Last turn off Semiahmoo was hard to see in the dark.  
Less rain  
Less rain more golf  
Less rain!

Lifestyle, Relaxed, Comfy, Good Shopping  
Like to come to visit  
Live music & clubs  
Lodging on or closer to Mt. Baker  
Loose slot machines  
Love it  
Lower hotel rates  
More accommodations at baker, cheaper  
More activities for young children  
More advertising on a national level  
More advertising in Vancouver B.C./DC area  
More Amtrak service rail not bus  
More attractions for kids / or access to information about kid's activities  
More business  
More camping  
More downtown stuff  
More employment opportunities  
More free parking  
More great architecture, like the new museum! Finally develop the waterfront site.  
(Former factory)  
More hotels, high end  
More inexpensive over-night options, weekend passes to baker rather than daily pass  
More info on rentals /accommodations glacier area  
More local artist  
More nicer restaurants  
More nightclubs  
More parking free down town  
More public parking (free)  
More public waterfront to Bellingham bay  
More rental accommodations at a moderate price  
More restaurants/shops  
More retirement funds  
More shops open downtown!!  
More sunny days  
More sunny weather  
More time off  
More walking trails by the water  
More whales  
Move my other kids /grandkids here.  
Music events  
Need good family restaurants moderately priced, move theaters with stadium seating.  
Need more signage on the road- I get lost driving More Hotels that are moderately priced (150-200 per night) I often have trouble getting a room due to no vacancy at the hotels. I like Best Western, Lakeway + Fairhaven Village Inn  
Nil  
No ideas great as is

No immediate ideas.  
No more condo. Save Lowell. No Chickanut ridge development.  
None. A great place with limitless outdoor activities. Every time I visit I discover something (place) wonderful and new.  
Not Much  
Not much, just visiting children and grandchildren  
Nothing, perfect  
Nothing  
Nothing  
Nothing  
Nothing  
Nothing  
Nothing  
Nothing  
Nothing  
Nothing, it's a nice place to visit  
Nothing, I can think of  
Nothing, I love the area  
Nothing, it is a great place to be  
Nothing, that comes to mind  
Nothing, we are just passing through :)  
Nothing, we like it.  
Nothing!  
Nothing, we love it here.  
O.K.  
Ocean, shopping  
Offer discounts  
One-night accommodations in glacier or maple falls  
Open Children's Museum soon!  
Open the Children's Museum again and update website  
Parking Problems  
Perfect!  
Photography events, art fairs  
Possible relocation  
Promote Chakanti  
Relatives, Scenery, Relaxing, Friendly People.  
Remove homeless people from downtown corr.  
Shorter Border Lineups, Better money exchange rate.  
Silver reef casino and hotel  
Small town feel, friendly people  
Specials  
Stay unique  
Sunshine! Hehe we are from San Diego we are spoiled  
Support sustainability; market Bellingham as a leader in this area  
This is really only an overnight stop for me, but I do know that you have a lot to offer tourists to the area

Very Nice

Very pretty and lots of things to do

Warmer weather

Was hard to research hotels/motels on the web, many of them did not seem to be online

We always come here!

We visit relative so, OK as is!!!

Weather

We'll always come back for the shopping

Winter Farmers Market.

Yes, beautiful landscape