

Santa Barbara South Coast

Visitor Profile & Economic Impact Research

Key Findings
October 2013

Methodology

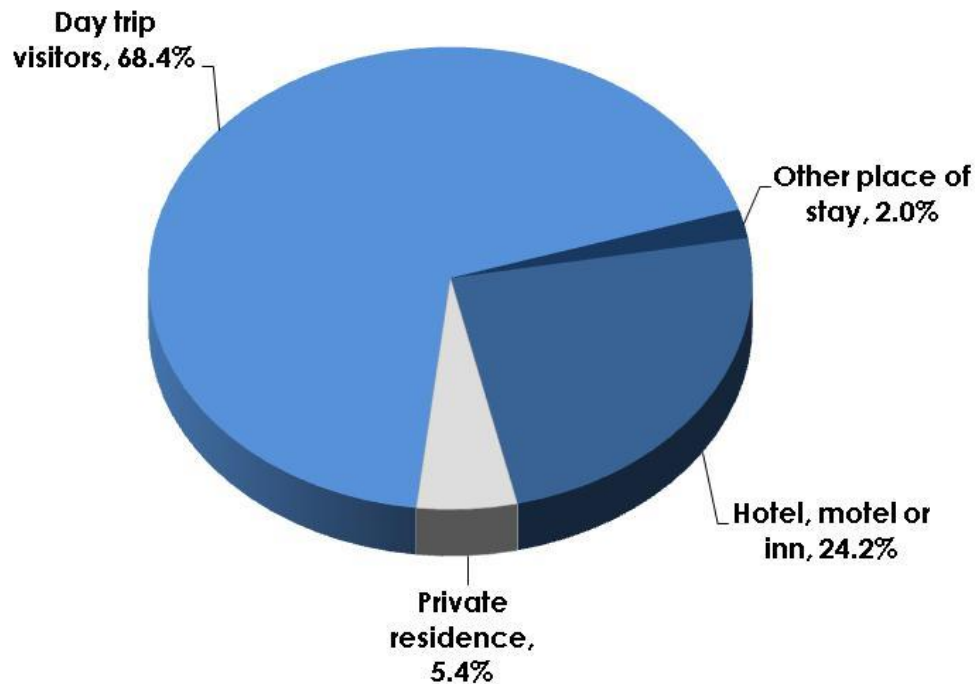
Year-long *survey-based* visitor profile study (FY 2012/13):

- **Santa Barbara South Coast Hotel Guest Survey**
 - **29 lodging properties--two weeks each quarter**
 - **1,305 fully completed surveys**
- **Santa Barbara South Coast Visitor Intercept Survey**
 - **Random locations throughout the Santa Barbara South Coast**
 - **2,235 visitors were interviewed - 829 day-trippers or VFRs**
- **Survey of Santa Barbara South Coast Homes (400 homes)**
- **Surveys of Santa Barbara South Coast Hoteliers**
- **Surveys of Meeting Planners**

Methodology



Visitor in Santa Barbara South Coast

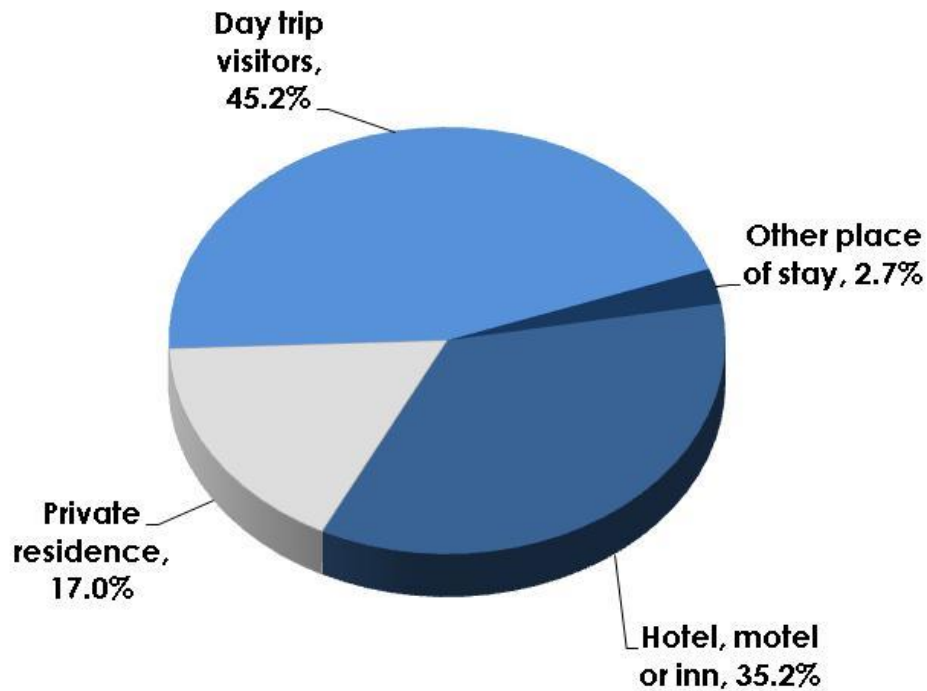


Visitors (in thousands)	
Hotel, motel or inn	1,487
Private residence	329
Day trip visitors	4,200
Other place of stay	125
Total	6,141

Visitors (in thousands)	
Santa Barbara	5,509
Carpinteria	897
Goleta	817
Montecito	491
Summerland	227

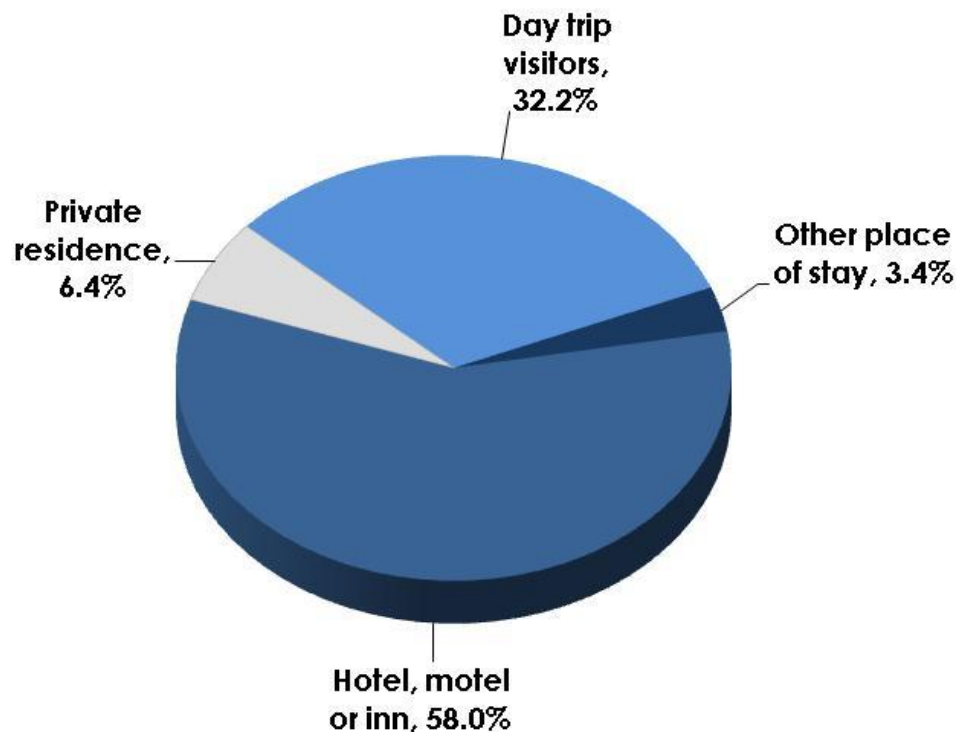


Visitor Days in Santa Barbara South Coast



Visitor Days (in thousands)	
Hotel, motel or inn	3,272
Private residence	1,579
Day trip visitors	4,200
Other place of stay	249
Total	9,301

Visitor Spending in Santa Barbara South Coast

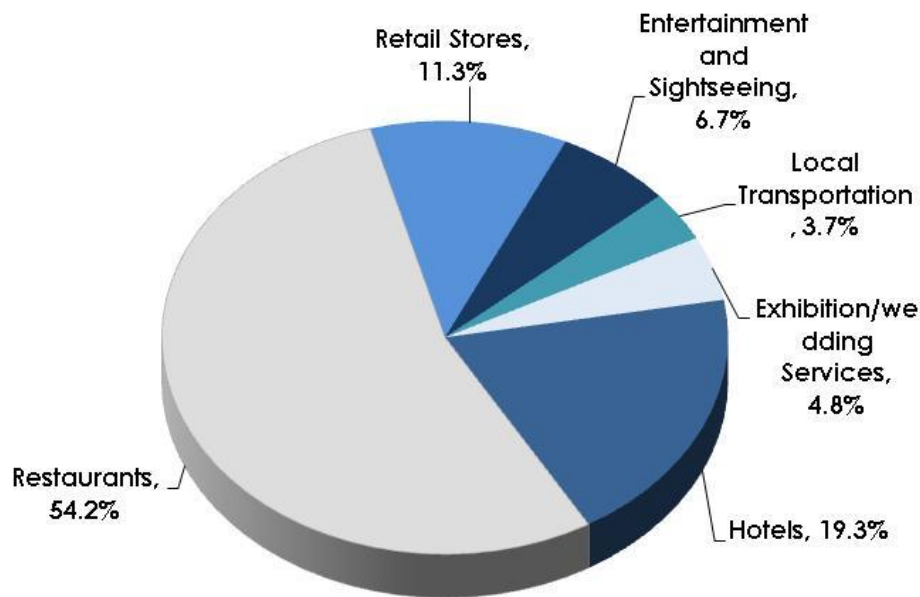


Spending (in thousands)	
Hotel, motel or inn	\$850,685
Private residence	\$93,819
Day trip visitors	\$472,819
Other place of stay	\$49,919
Total	\$1,467,242

Spending (in thousands)	
Montecito	\$154,369
Goleta	\$238,783
Carpinteria	\$116,329
Santa Barbara	\$943,251
Summerland	\$14,511
Total	\$1,467,242



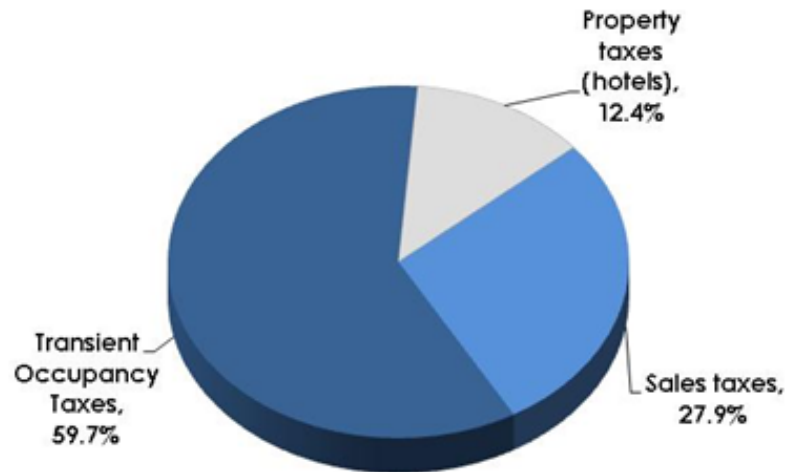
Jobs Supported by Visitor Industry



TOTAL VISITOR GENERATED EMPLOYMENT IN ALL INDUSTRIES

INDUSTRY SEGMENT	Jobs Supported
Hotels	2,319
Restaurants	6,504
Retail Stores	1,354
Entertainment and Sightseeing	799
Local Transportation	448
Exhibition Services	577
Total Visitor Industry	12,001

Tax Revenues Generated by Visitor Industry



DERIVED GOVERNMENTAL REVENUES GENERATED BY VISITOR INDUSTRIES	
MAJOR REVENUE SOURCES	
	Total Annual Direct Revenue in 2012/13 \$1,000s
HOTEL TAX	
Hotel tax collected by governmental entities	\$27,329
PROPERTY TAX	
Property taxes paid to city governments	\$5,690
SALES TAX	
Sales tax returned to the city governments	\$12,786
DIRECT GOVT. REVENUES FROM VISITOR INDUSTRY	\$45,805

Fun Facts – South Coast Visitor Industry

Average daily visitors	25,482
Direct Visitor Spending (daily average)	\$4.0 million
Jobs Supported by the Visitor Industry	12,001
Taxes Generated (annually)	\$46 million
Taxes Generated (annually per South Coast household)	\$832

Santa Barbara South Coast Visitor Profile

Primary Reason for Visit



HOTEL SEGMENT

Business/Group Meeting

Carpinteria	21.1%
Goleta	17.7%
Santa Barbara	14.7%

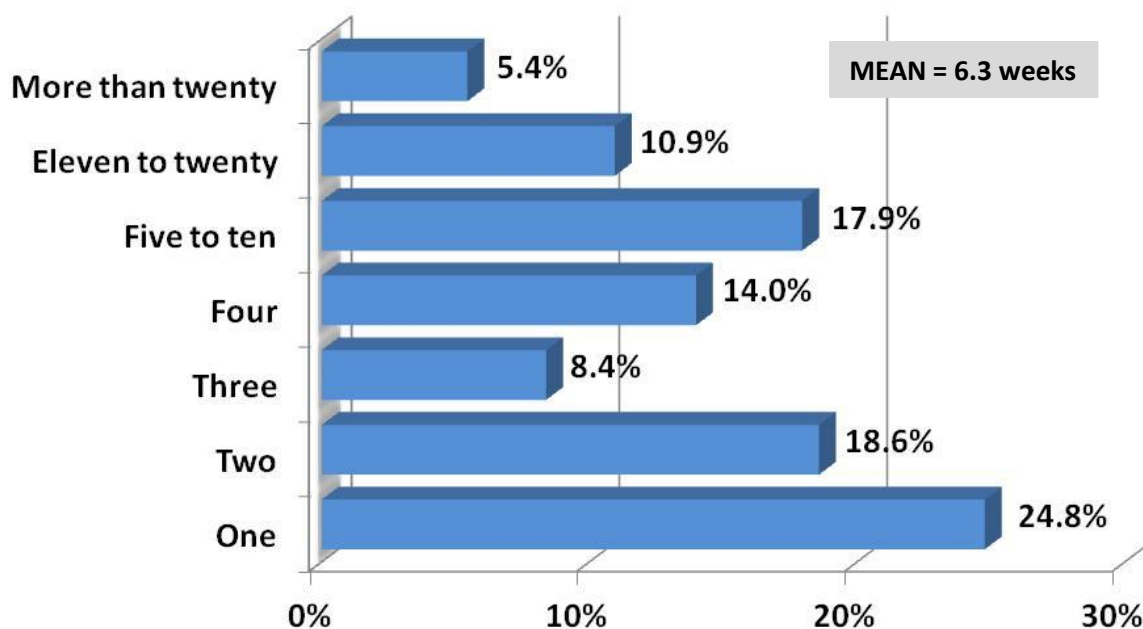
Vacation

Carpinteria	29.5%
Goleta	23.1%
Santa Barbara	40.8%



Q: Which best describes the primary reason for making this visit to the Santa Barbara South Coast area?

Number of Weeks Planning Trip



HOTEL SEGMENT

Weeks in Advance

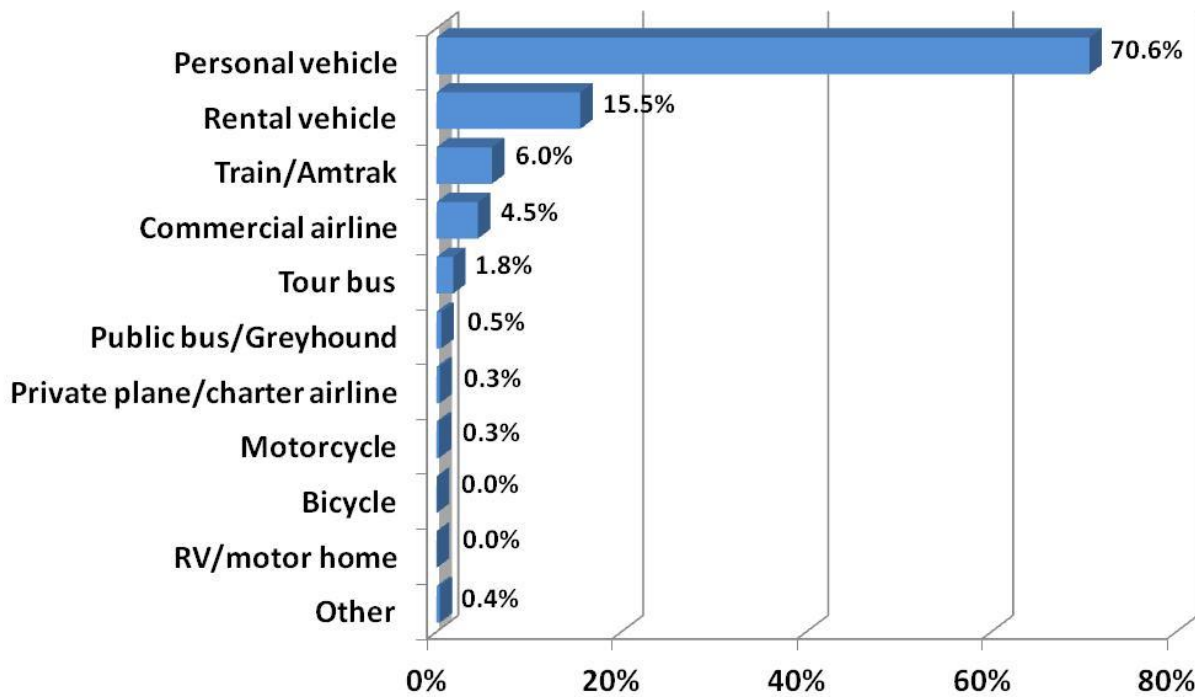
Carpinteria 6.2

Goleta 6.3

Santa Barbara 8.5

Q: How many weeks in advance did you begin planning your visit to Santa Barbara?

Method of Arrival



HOTEL SEGMENT

Method of Arrival

Private car

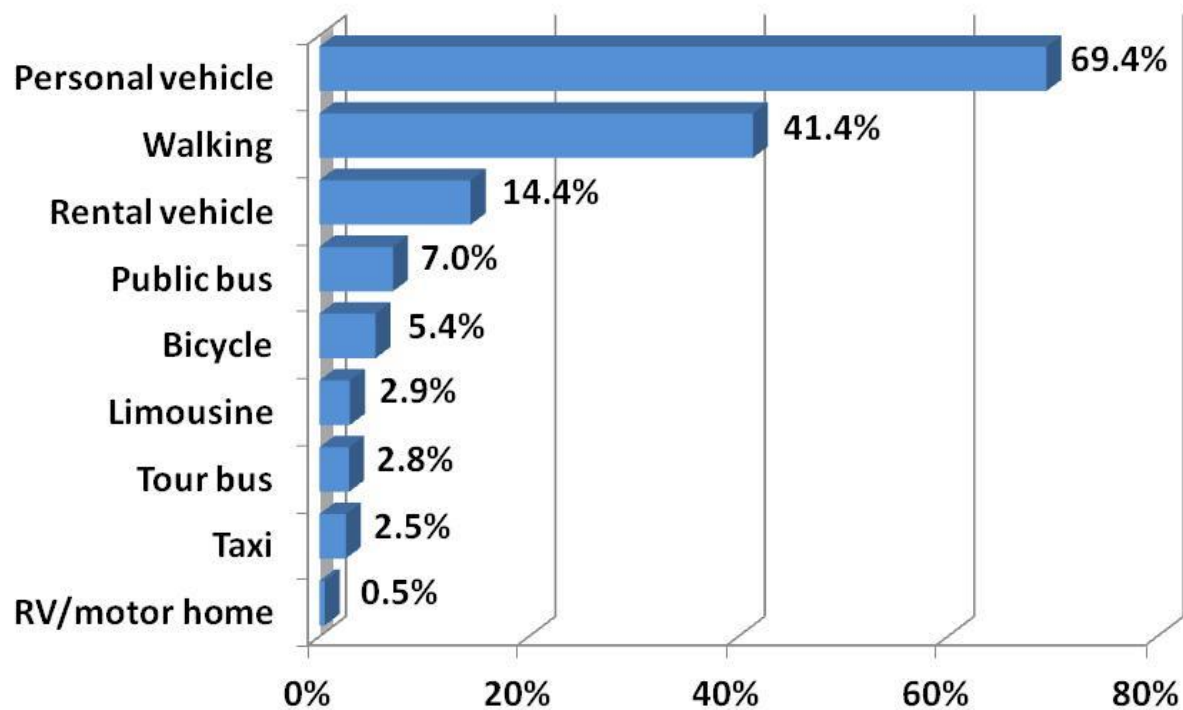
Carpinteria	68.4%
Goleta	75.2%
Santa Barbara	55.9%

Rental car

Carpinteria	16.8%
Goleta	6.2%
Santa Barbara	23.6%

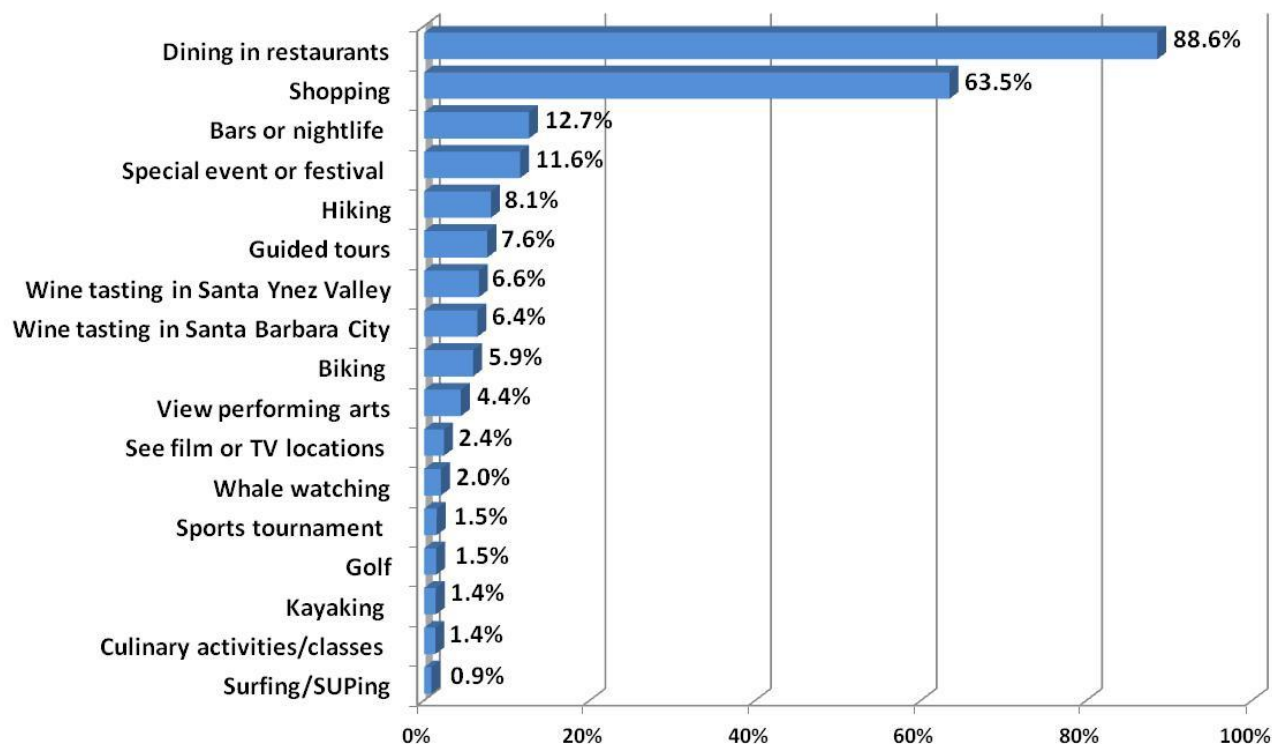
Q: How did you arrive in the Santa Barbara South Coast area? (Select one)

Transportation in Santa Barbara



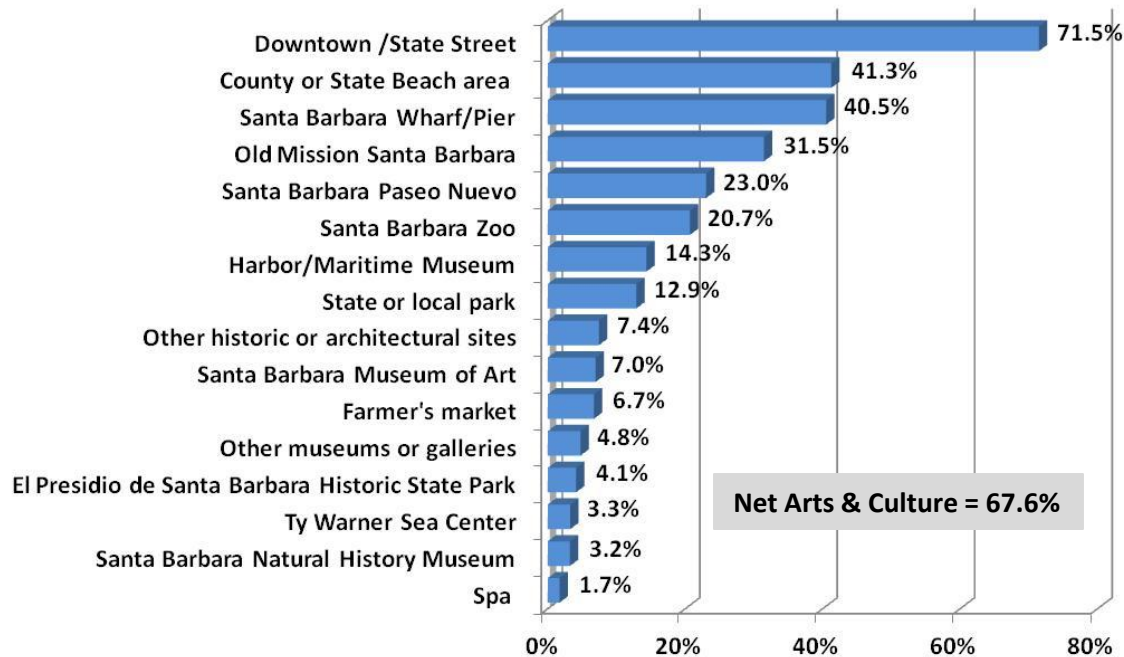
Q: How did you get around the Santa Barbara South Coast area? (Select all that apply)

Visitor Activities



Q: Please look at this list of activities. As we read down this list together, please tell me which of these activities you have or will participate in while in the Santa Barbara South Coast area. (Select all that apply)

Attractions Visited



HOTEL SEGMENT

Attractions Visited

Net Arts & Culture

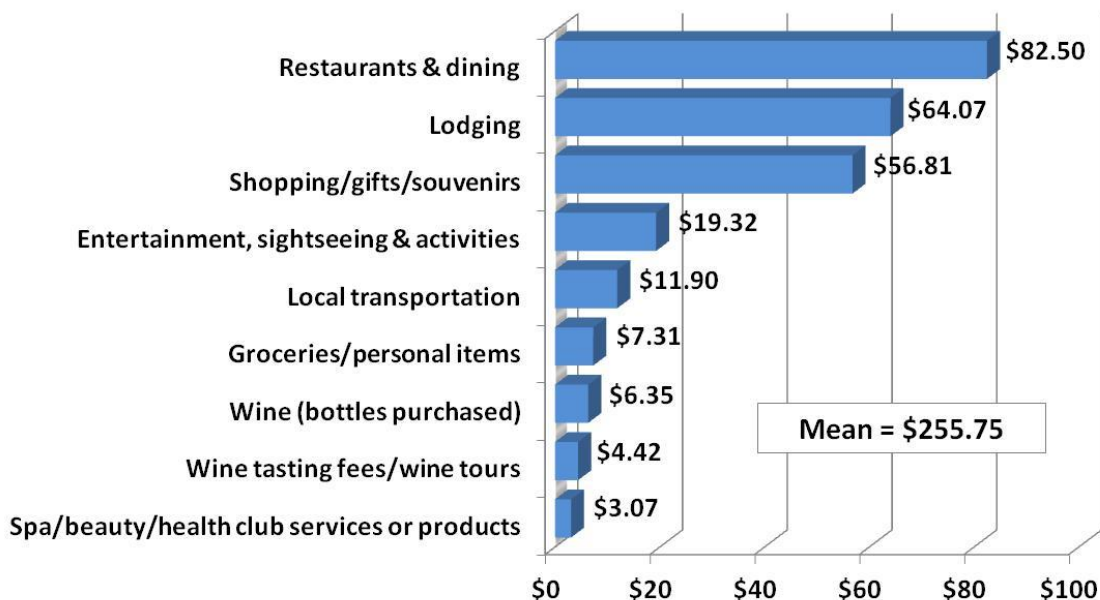
Carpinteria 46.8%

Goleta 46.6%

Santa Barbara 54.7%

Q: Please look at this list of attractions. As we read down this list together, please tell me which you visited or will visit while in the Santa Barbara South Coast area. (Select all that apply)

Daily Trip Spending



	Total	Hotel Guests	VFR Visitors	Day-trip Visitors
Restuarants & dining	\$82.50	\$123.80	\$82.20	\$63.47
Lodging	\$64.07	\$228.53	\$2.52	\$0.00
Shopping/gifts/souvenirs	\$56.81	\$62.38	\$51.93	\$55.09
Entertainment, sightseeing & activities	\$19.32	\$28.26	\$15.31	\$15.13
Local transportation	\$11.90	\$23.09	\$13.94	\$7.28
Groceries/personal items	\$7.31	\$18.79	\$14.82	\$1.77
Wine (bottles purchased)	\$6.35	\$15.03	\$9.04	\$1.81
Wine tasting fees/wine tours	\$4.42	\$10.29	\$15.96	\$1.49
Spa/beauty/health club services or products	\$3.07	\$10.61	\$2.19	\$0.31
Total	\$255.75	\$520.79	\$207.90	\$146.36
Base	2216	1305	216	632

Q: How much PER DAY did your immediate party spend on each of the following while in the Santa Barbara South Coast area? (Please only include your spending in the Santa Barbara South Coast area.)

Daily Trip Spending



HOTEL SEGMENT

Spend (Per-person, per-day)

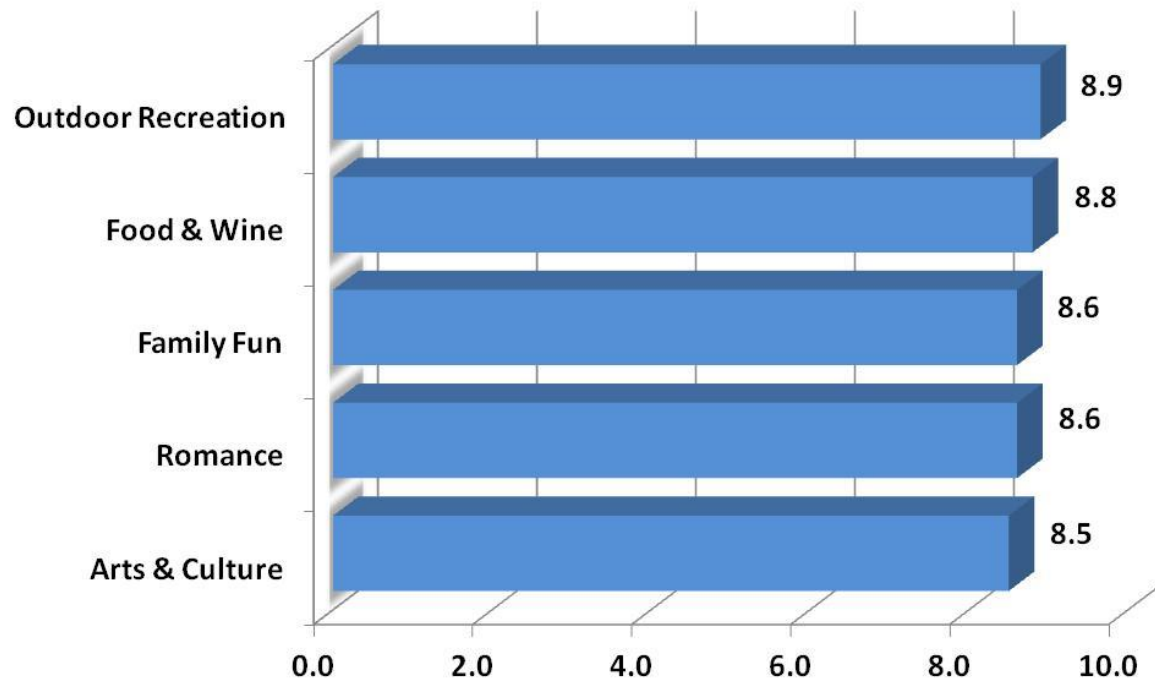
Carpinteria \$144.01

Goleta \$249.19 

Santa Barbara \$197.85

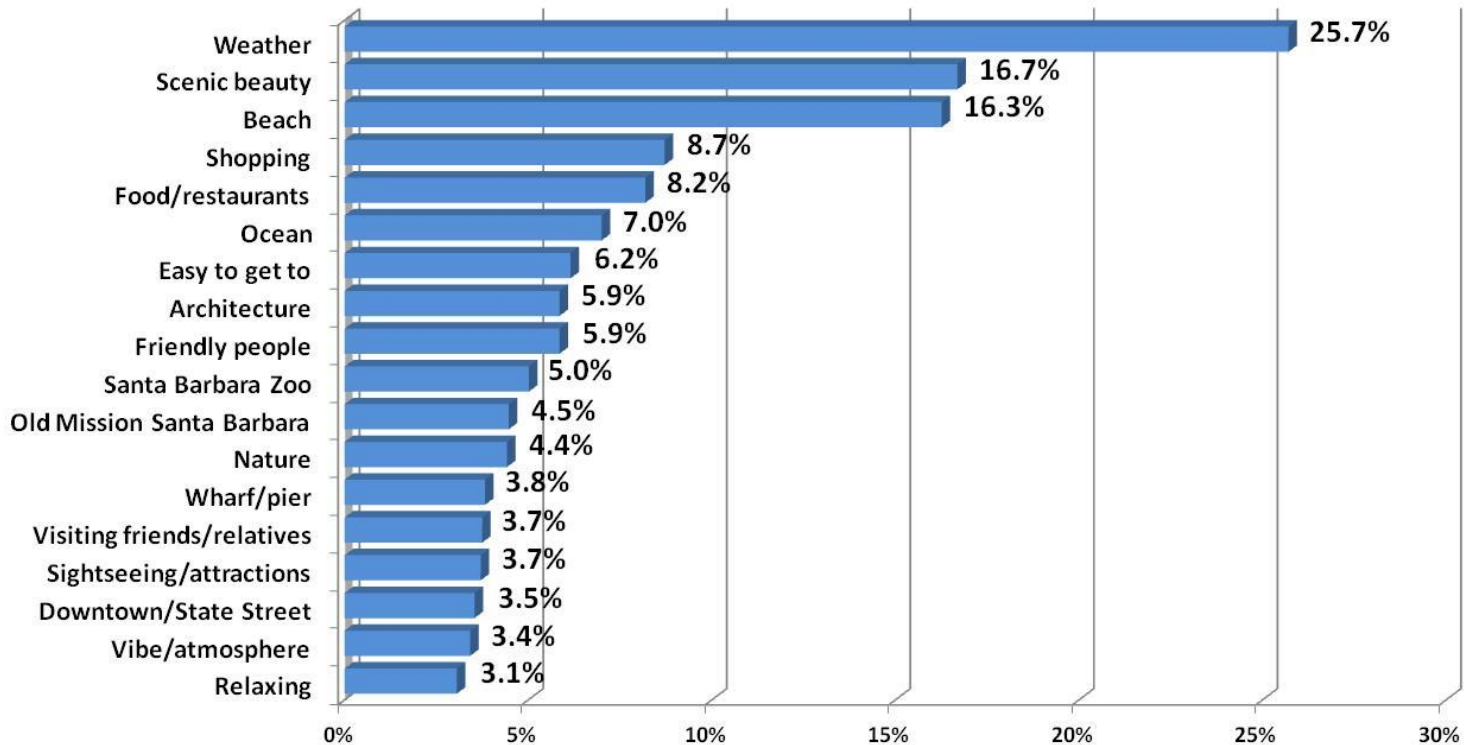
Q: How much PER DAY did your immediate party spend on each of the following while in the Santa Barbara South Coast area? (Please only include your spending in the Santa Barbara South Coast area.)

Visitor Experience Ratings



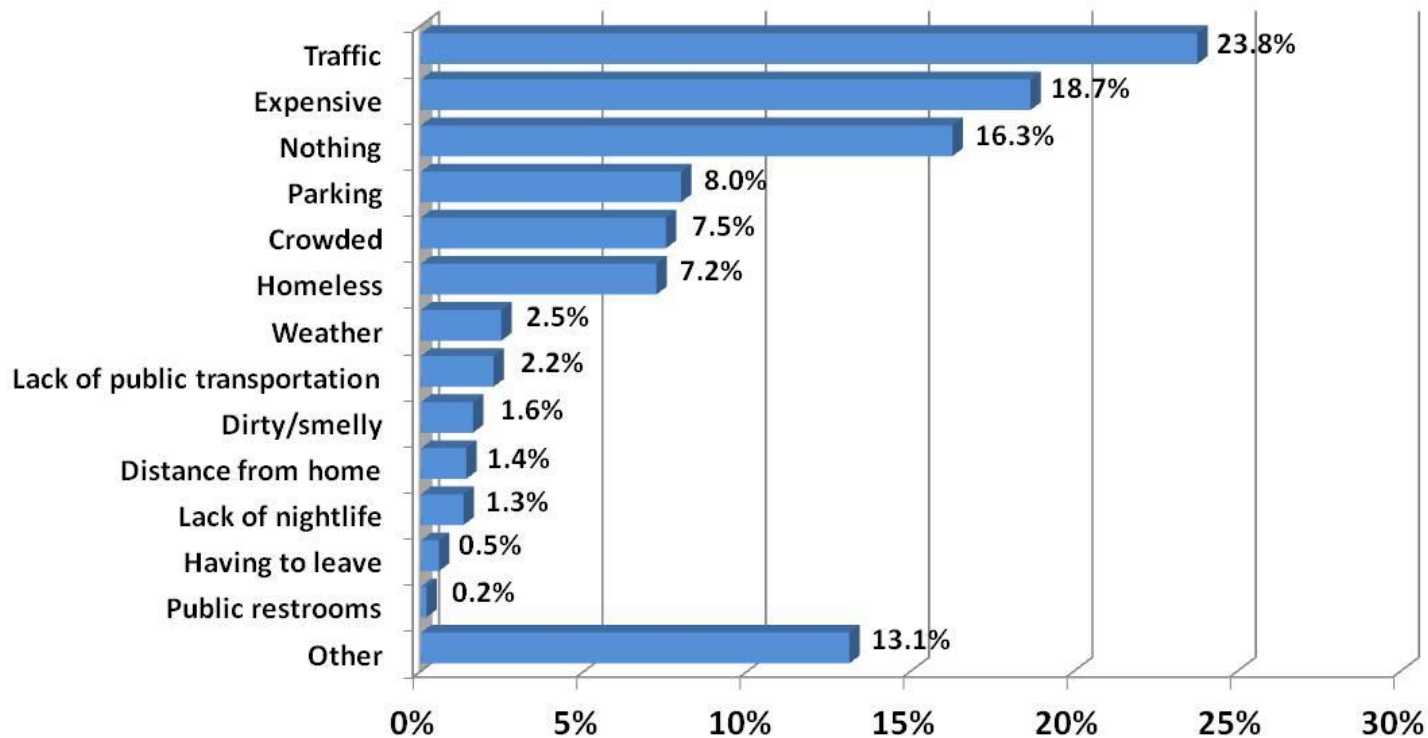
Q: Using a scale of 1 to 10, where 10 is "Excellent" and 1 is "Very poor," please rate the Santa Barbara South Coast area as a place to visit for each of the following experiences:

Most Liked Destination Attribute



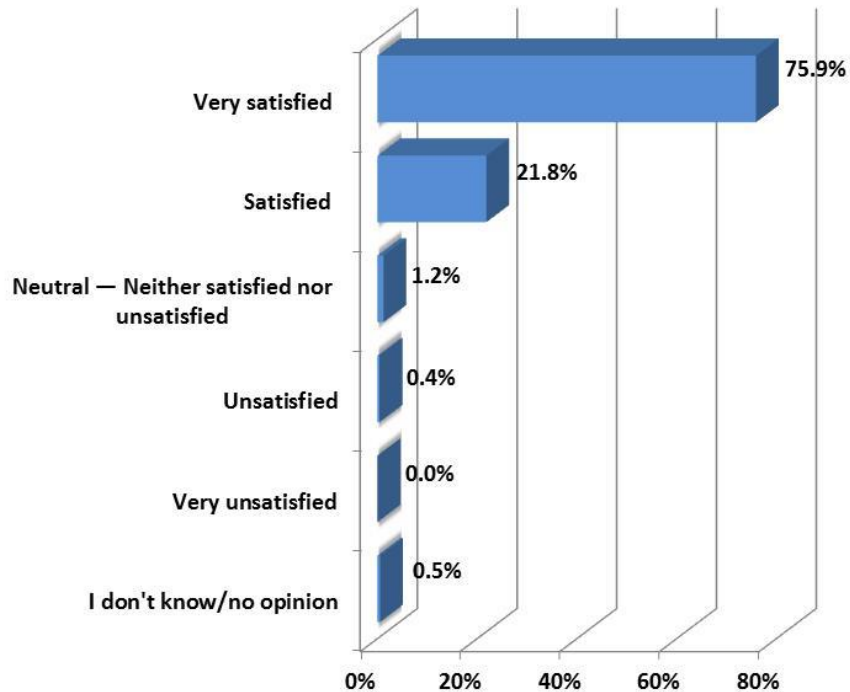
Q: What do you like most about the Santa Barbara South Coast area?

Least Liked – Destination Attribute



Q: What do you like least about the Santa Barbara South Coast area?

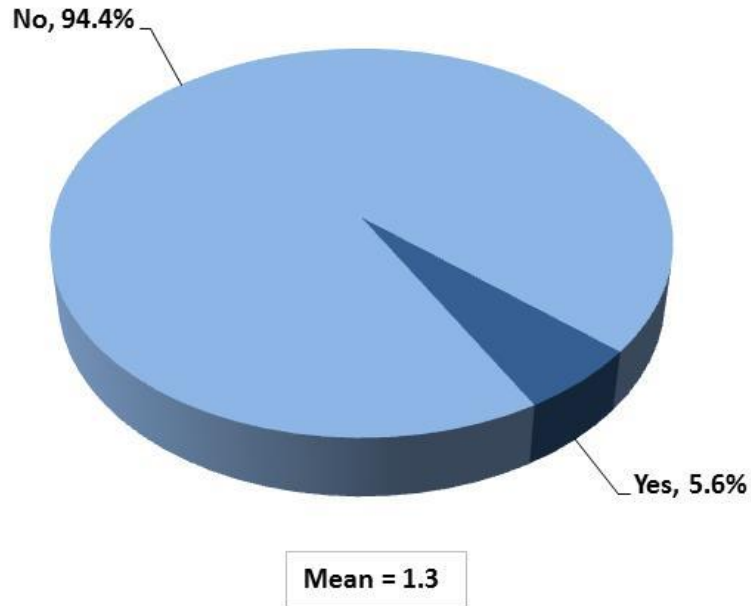
Satisfaction



	Total	Hotel Guests	VFR Visitors	Day-trip Visitors
Very satisfied	75.9%	78.6%	84.5%	74.3%
Satisfied	21.8%	18.8%	15.0%	23.6%
Neutral—Neither satisfied nor unsatisfied	1.2%	1.5%	0.5%	1.1%
Unsatisfied	0.4%	1.0%	0.0%	0.3%
Very unsatisfied	0.0%	0.1%	0.0%	0.0%
I don't know/no opinion	0.5%	0.1%	0.0%	0.7%
Base	2125	1246	207	611

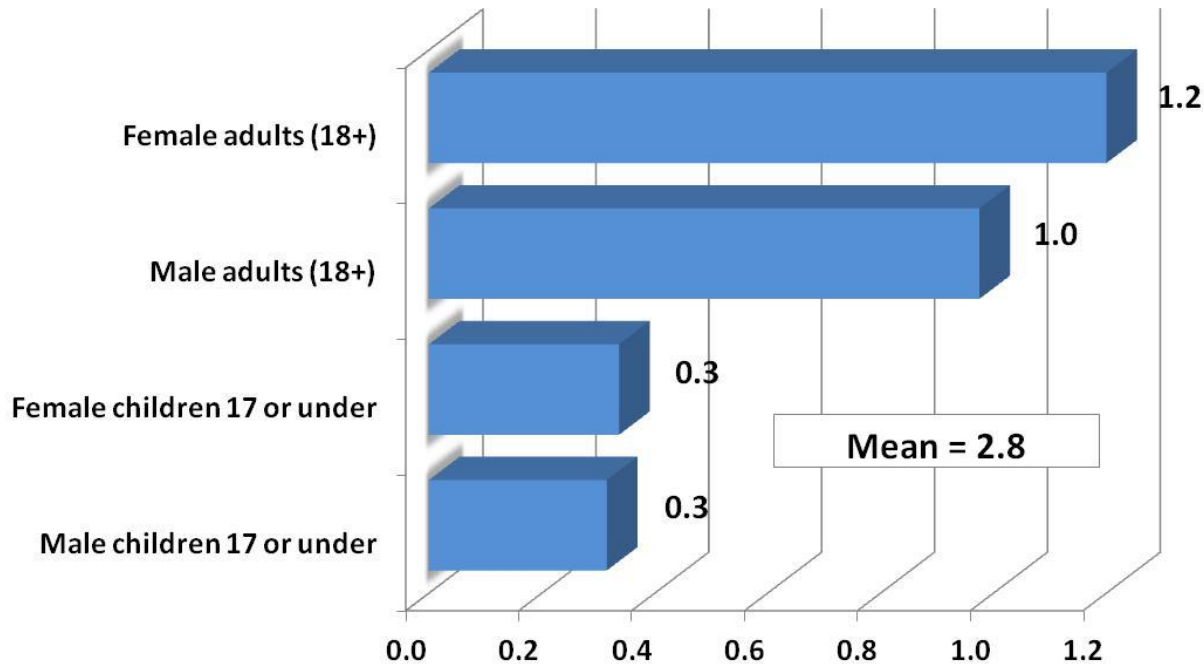
Q: How satisfied are you with your Santa Barbara South Coast area experience?

Extending Intended Trip



Q: Did any information you accessed while in the area cause you to extend your stay in the Santa Barbara South Coast? If YES, by how many nights?

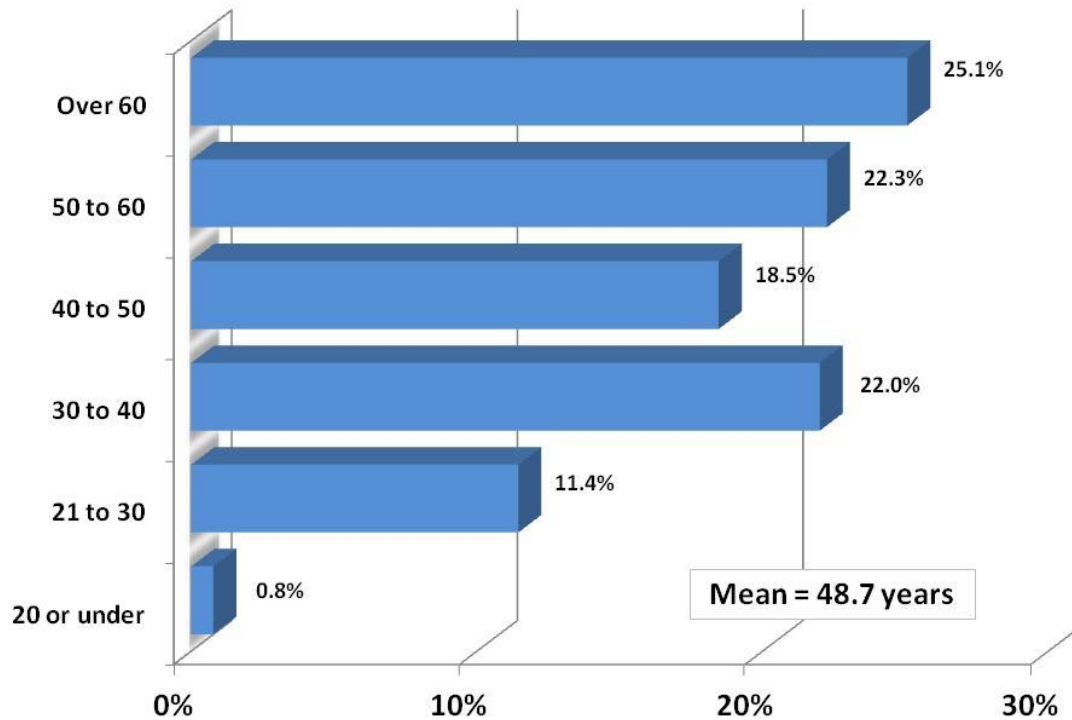
Demographics: Travel Party Size



31.8 percent of travel parties have children under age 18 in them.

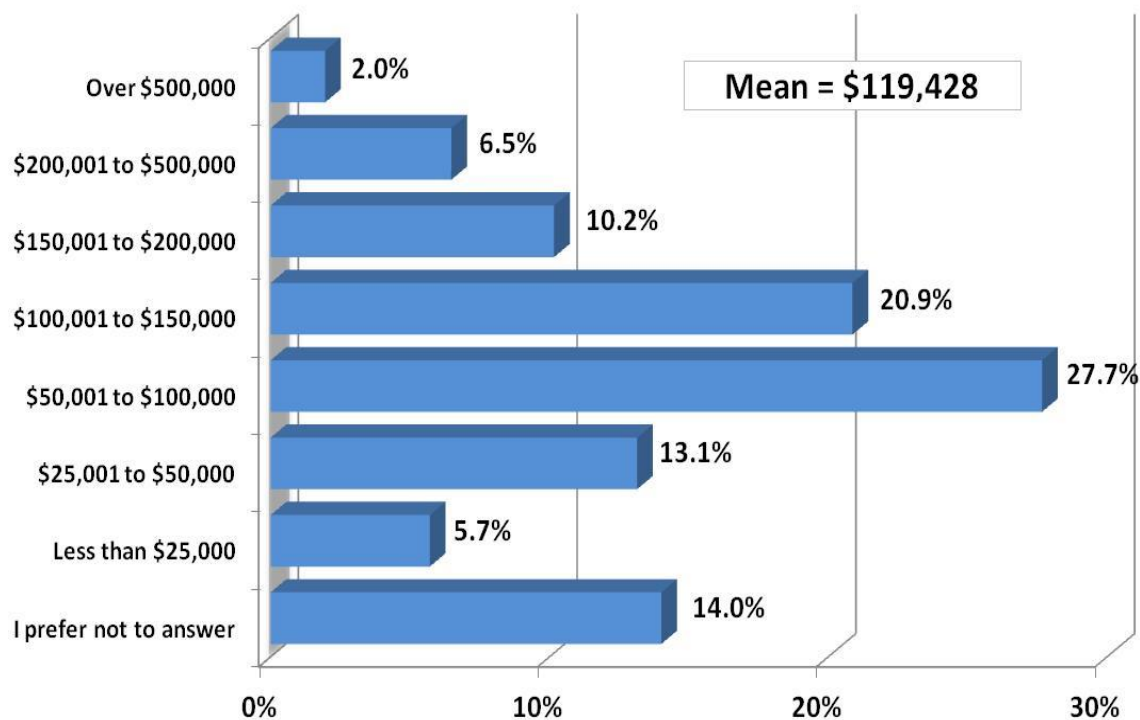
Q: Please tell us how many people (including yourself) were in your immediate travel party. Please enter the number of each type of travel party member in the fields below.

Demographics: Age



Q: *In what year were you born?*

Demographics: Annual Household Income



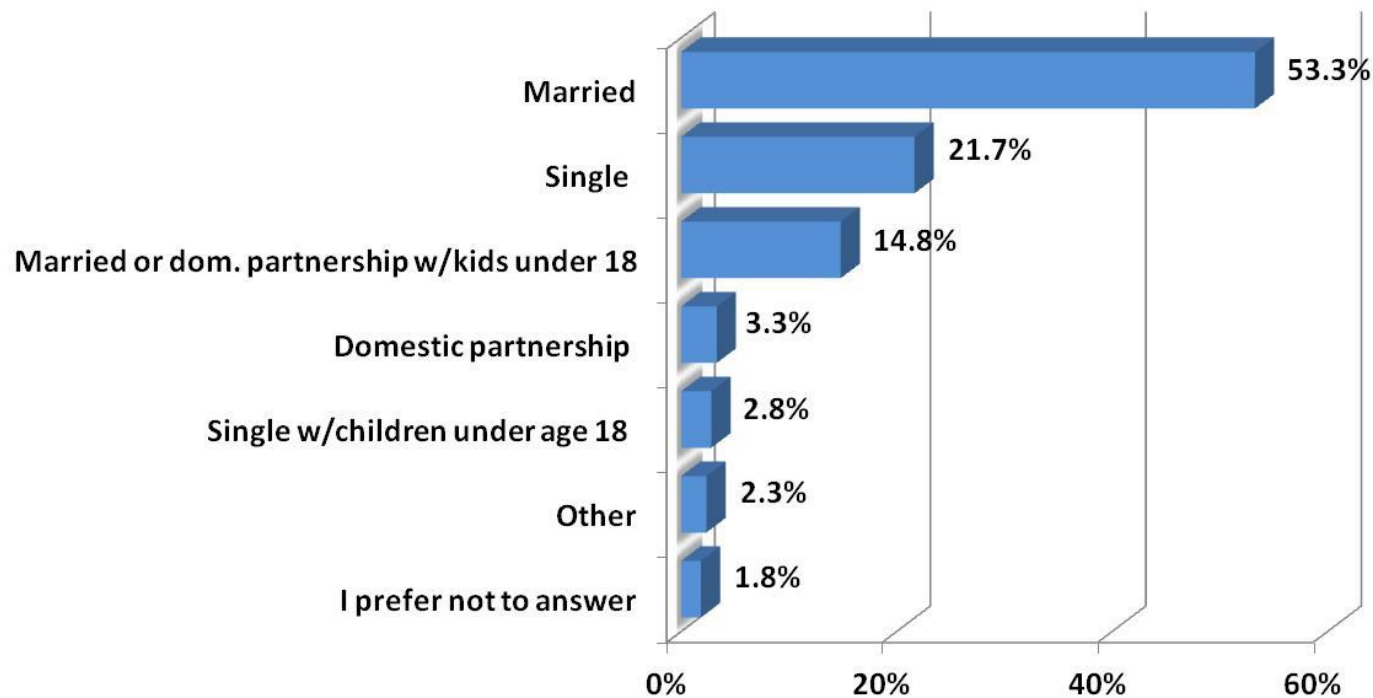
HOTEL SEGMENT

Annual HHI > \$100,000

Carpinteria	54.3%	◀
Goleta	71.3%	
Santa Barbara	68.2%	

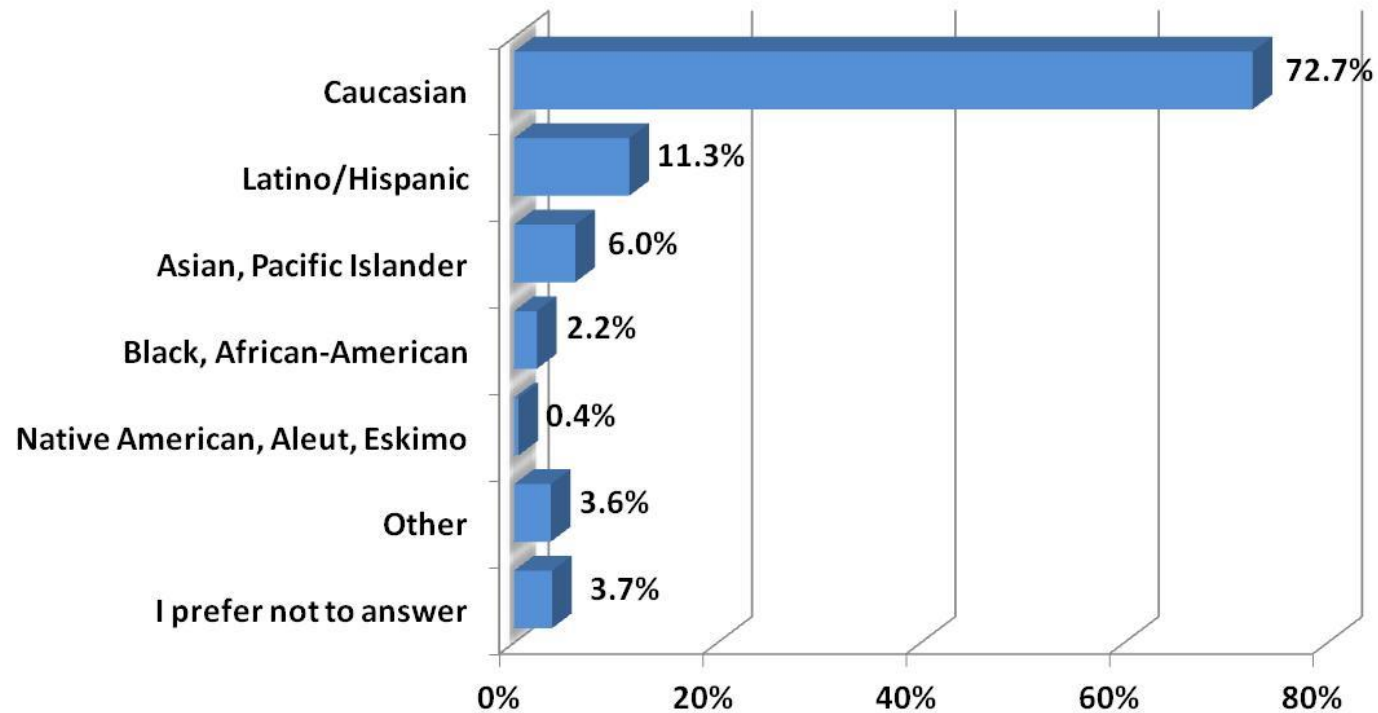
Q: Which best describes the combined annual income of all members of your household?

Demographics: Marital Status



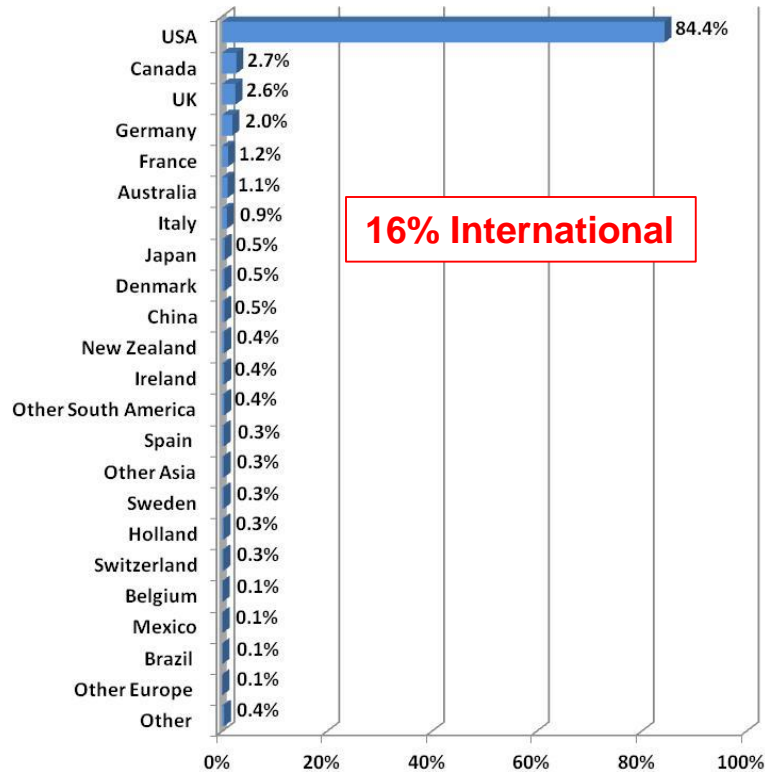
Q: Which best describes your marital status?

Demographics: Ethnicity



Q: Which best describes your race or ethnic background?

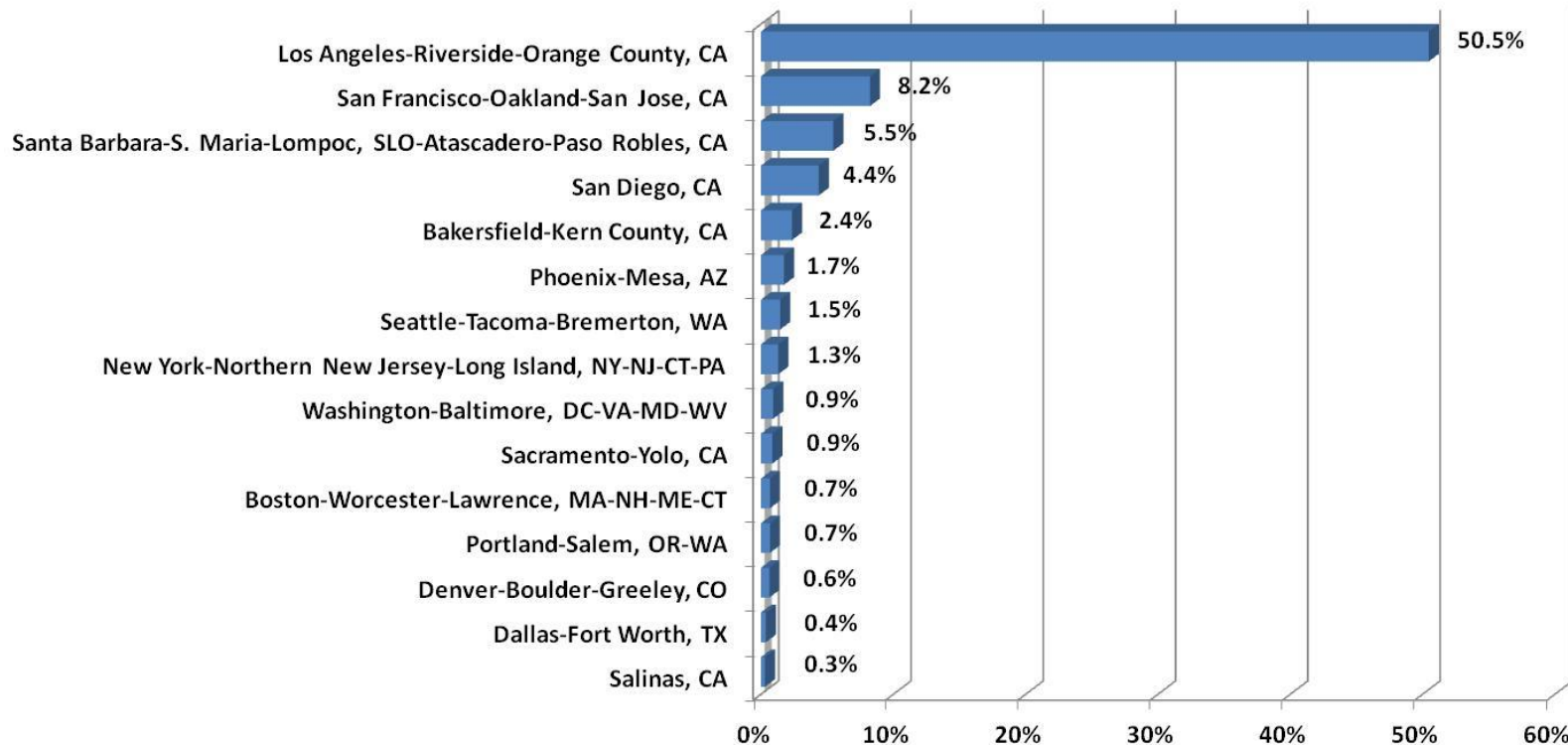
Demographics: Point of Origin



	Total	Hotel Guests	VFR Visitors	Day-trip Visitors
USA	84.4%	82.9%	87.8%	84.8%
Canada	2.7%	3.3%	0.6%	2.8%
UK	2.6%	4.1%	0.6%	2.2%
Germany	2.0%	2.3%	1.2%	1.5%
France	1.2%	1.3%	0.6%	1.1%
Australia	1.1%	1.2%	1.2%	1.1%
Italy	0.9%	0.4%	2.3%	1.1%
Japan	0.5%	0.5%	0.6%	0.4%
Denmark	0.5%	0.2%	0.0%	0.6%
China	0.5%	0.5%	0.6%	0.4%
New Zealand	0.4%	0.5%	0.0%	0.4%
Ireland	0.4%	0.5%	0.0%	0.4%
Other South America	0.4%	0.0%	0.0%	0.4%
Spain	0.3%	0.2%	0.6%	0.4%
Other Asia	0.3%	0.0%	1.2%	0.4%
Sweden	0.3%	0.2%	0.0%	0.4%
Holland	0.3%	0.5%	0.0%	0.2%
Switzerland	0.3%	0.4%	0.6%	0.2%
Belgium	0.1%	0.0%	0.0%	0.2%
Mexico	0.1%	0.2%	1.2%	0.0%
Brazil	0.1%	0.2%	0.6%	0.0%
Other Europe	0.1%	0.2%	0.6%	0.0%
Other	0.4%	0.0%	0.0%	0.6%
Base	1989	1303	172	462

Q: In what country do you reside?

Demographics: Point of Origin



Q: What is your zip?

