



Visit Santa Barbara  
**Santa Barbara Visitor Profile**

Q1 (September-November 2016)  
Interim Report of Findings



# Research Overview

This report presents the interim findings of a comprehensive visitor profile development and tourism economic impact study conducted by Destination Analysts, Inc. on behalf of Visit Santa Barbara. The data presented here comes from an intercept survey of Santa Barbara area visitors at locations throughout the area, as well as from a self-administered survey distributed to guests at Santa Barbara area hotels.

This report presents the survey data collected from these surveys between September and November 2016. Note that data presented in this interim report has been weighted based on the destination's overall visitor mix.



**Important Note:** This report represents only a quarter of the overall data we will collect from Santa Barbara area visitors throughout 2016/2017—and thus sample sizes for some visitor segments' are small and should be considered informational and not directional at this point.



# Research Objectives

The overarching goal of this survey-based research is to create an in-depth profile of the Santa Barbara area visitor, including developing the following marketing intelligence:

- Detailed trip characteristics (i.e. tripographic information like the reason for visiting the Santa Barbara area, length of stay, place of stay, etc.)
- Activities & attractions visited in the Santa Barbara area
- Evaluation of Santa Barbara area brand attributes
- Detailed Santa Barbara area visitor spending estimates
- Travel planning resources used by Santa Barbara area visitors
- Visitor expectations and satisfaction
- Visitor psychographic and demographic profiling

In addition to developing the Santa Barbara area visitor profile, data from this research will be used as inputs into Destination Analysts' economic model to estimate the annual impact of tourism to the Santa Barbara South Coast area.

# Methodology

The research includes two separate yet carefully integrated survey collection techniques. Destination Analysts, working closely with Visit Santa Barbara, prepared a base survey questionnaire that was fielded in two ways: (1) an intercept survey of visitors to the Santa Barbara South Coast area collected at locations around the destination, and (2) a self-administered survey of Santa Barbara area hotel guests distributed at their hotel.

Through the first quarter (September-November 2016), 396 responses were collected from three different groups of visitors:

1. Visitors staying in a hotel inside the Santa Barbara South Coast area (hotel guests)
2. Visitors staying in the private home of a friend or relative inside the Santa Barbara area (VFRs)
3. Day-trippers to the Santa Barbara area (regional residents coming to the area for the day and those on trips staying overnight outside the Santa Barbara South Coast area)

The survey also collected data from visitors staying overnight in the Santa Barbara area in other types of accommodations, such as a private home rental or campground. All data collected in the intercept survey and hotel guest survey has been weighted to reflect the actual proportion of hotel guests, VFRs, and day-trip visitors to the Santa Barbara area. The weighting plan applied to this data has been extracted from the 2013 Santa Barbara Visitor Profile. At the conclusion of this project the weighting plan will be updated based on actual 2016/17 visitor volume estimates.



# Visitor Intercept Survey Overview

Destination Analysts' survey collection team worked at locations around the destination to randomly select and interview visitors. The questionnaire was administered to persons residing outside the Santa Barbara South Coast area at the following locations:

- City of Santa Barbara Waterfront
- Figueroa Mountain Brewing Company
- Santa Barbara Maritime Museum
- Santa Barbara Museum of Natural History
- Santa Barbara Zoo
- Stearns Wharf



*Destination Analysts' team member surveying visitor at the Waterfront*



# Hotel Guest Survey Overview

The self-administered printed Hotel Guest Survey was distributed at various lodging properties throughout the Santa Barbara South Coast area. Guests were asked to complete the survey and drop it in the mail at their convenience (postage is paid via BRC). The following Santa Barbara area hotels distributed the Hotel Guest Survey:

- Bacara Resort & Spa
- Beach House Inn
- Belmond El Encanto
- Brisas del Mar Inn
- BW Pepper Tree Inn
- Cheshire Cat Inn
- Coast Village Inn
- Courtyard by Marriott Santa Barbara Goleta
- Four Seasons Resort The Biltmore Santa Barbara
- Franciscan Inn
- Hotel Indigo Santa Barbara
- Hotel Milo
- Hotel Santa Barbara
- Inn by the Harbor
- Pacific Crest Hotel Santa Barbara
- Pacifica Suites
- Ramada Santa Barbara
- Simpson House Inn
- Super 8 Goleta
- The Eagle Inn
- The Fess Parker a Doubletree by Hilton Resort
- The Goodland
- The Presidio
- The Wayfarer

# ABOUT THIS REPORT

**In the remainder of this report, data from the survey findings is presented as follows:**

- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by visitor place of stay:
  1. Hotel—Visitors who stayed overnight at a Santa Barbara area hotel during their trip
  2. VFR—Visitors who stayed overnight in a private residence of a friend or family member in the Santa Barbara area
  3. Day Trip—Visitors who did not stay overnight anywhere in the Santa Barbara area

*Note: findings for visitors who stayed in a private home rental was not broken out but is represented within the aggregate total charts.*

**\*\*For questions asked only in the Lodging Guest Survey or in the Visitor Intercept Survey, this is specified in the slide title.**



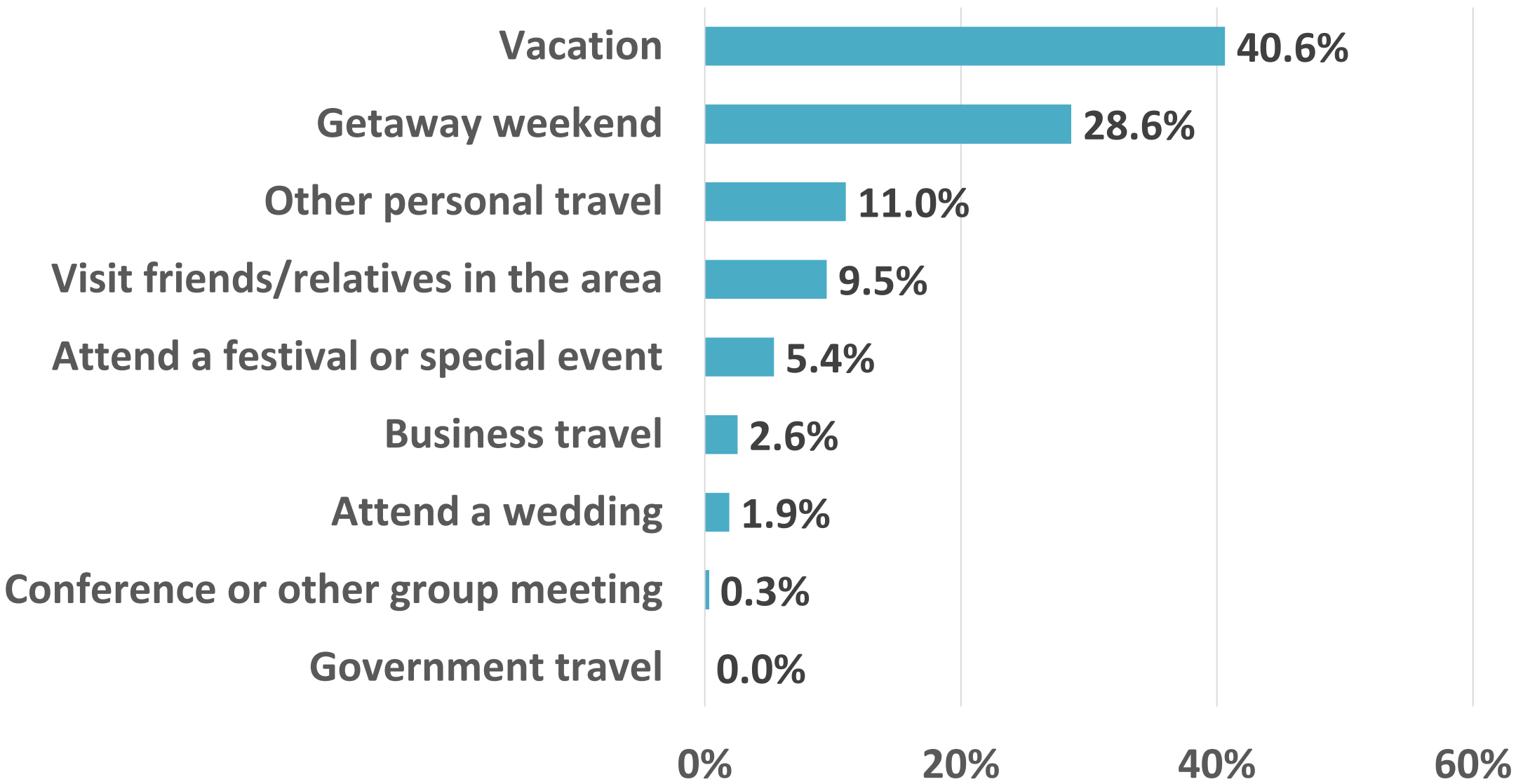
# DETAILED FINDINGS



# Primary Reason for Visit

Visitors surveyed between September and November of 2016 came to the Santa Barbara area primarily for leisure. In total, 40.6 percent of visitors surveyed were in the destination for a vacation, while 28.6 percent were on a getaway weekend. Approximately one-in-ten were in the Santa Barbara area for other personal travel (11.0%) or to visit friends/relatives (9.5%). Additionally, 2.9 percent of visitors surveyed were in the Santa Barbara area for business or conference/group meetings.

Figure 1: Primary Reason for Visit



Base: All respondents. 386 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Vacation	50.0%	22.6%	37.5%
Getaway weekend	20.9%	25.8%	31.9%
Other personal travel	6.8%	9.7%	12.5%
Visit friends and/or relatives in the area	8.1%	19.4%	9.7%
Attend a festival or special event	4.1%	12.9%	5.6%
Business travel	6.1%	3.2%	1.4%
Attend a wedding	2.7%	6.5%	1.4%
Conference, trade show or other group meeting	1.4%	0.0%	0.0%
Government travel	0.0%	0.0%	0.0%
Sample size:	148	62	144

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

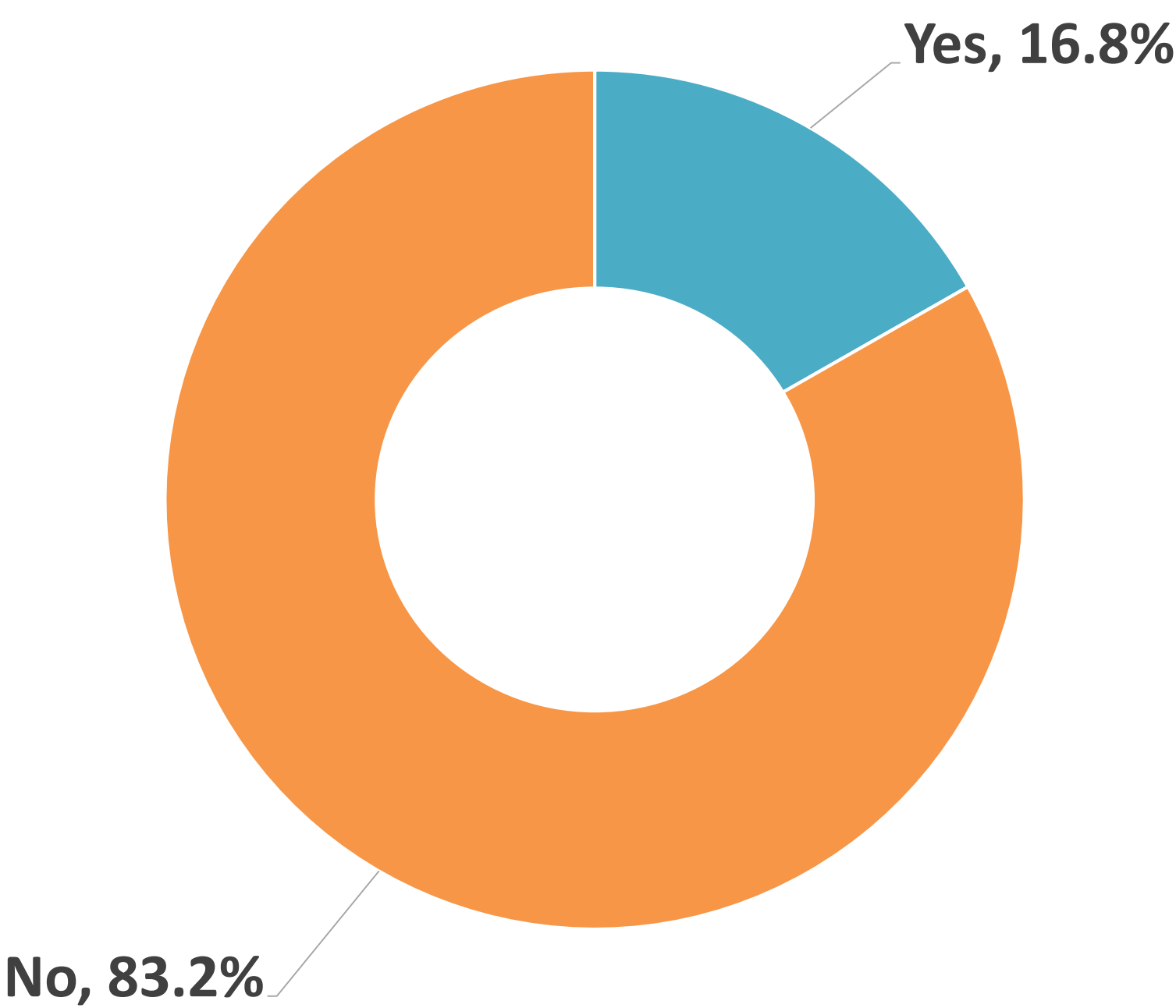
# Business Travelers: Extended Stay in Santa Barbara for Leisure

A notable proportion of business travelers surveyed said they extended their stay in Santa Barbara to accommodate leisure activities. Survey respondents who were in the Santa Barbara area for business, group meetings or government travel were asked if they extended their stay in the destination beyond what was needed for their business to enjoy leisure activities. In total, 16.8 percent of this group said they indeed stayed longer in the area for this purpose.

*\*Please note the small sample size. This data should be considered informational and not directional.*

Question: If here on business, did you extend your stay in Santa Barbara any additional days beyond what was needed for your business/meeting to accommodate leisure activities? Base: Respondents in the destination for business, group meetings or government travel. 11 responses (weighted).

Figure 2: Extended Stay in Santa Barbara for Leisure



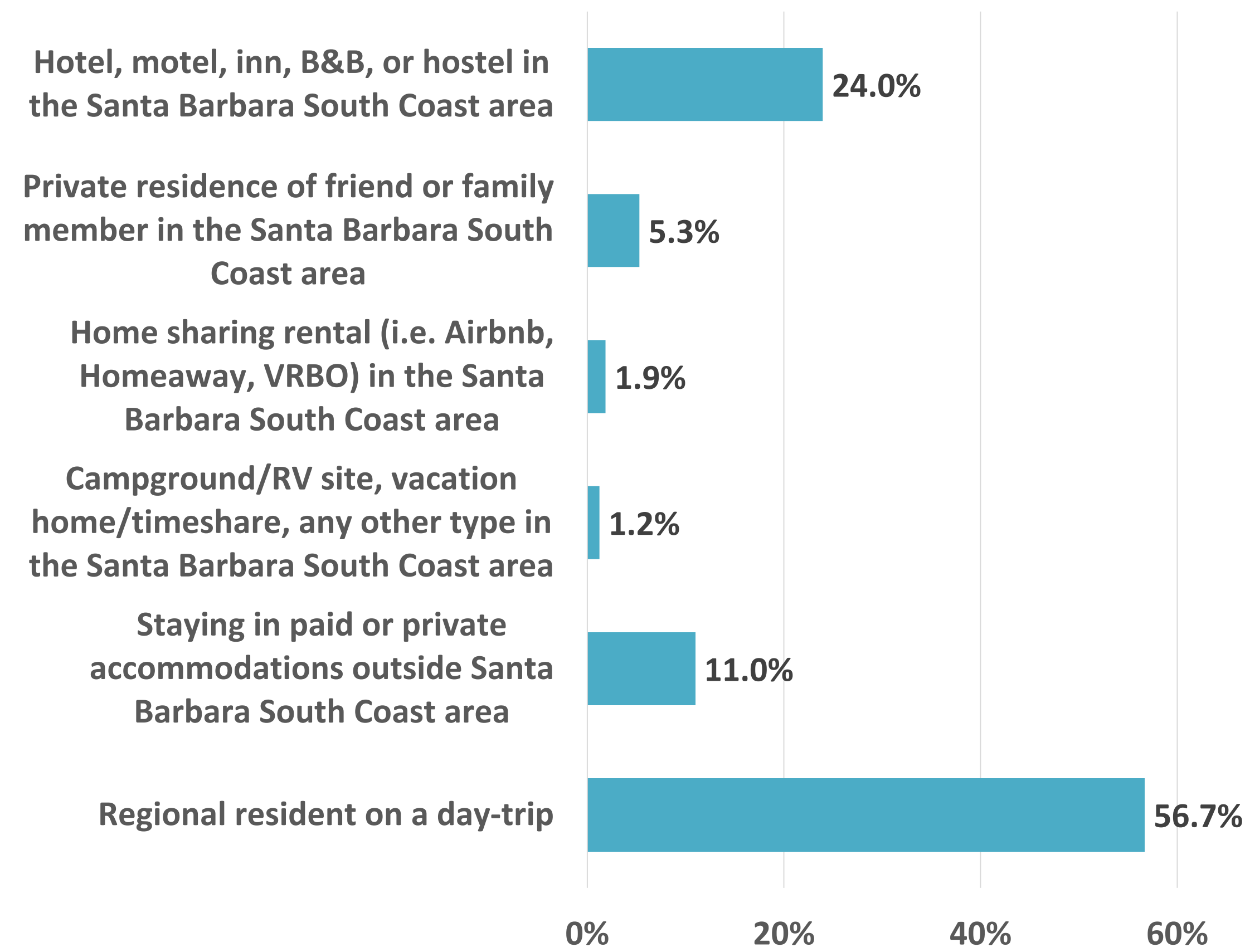


# Place of Stay

Through September to November of 2016, one-in-three visitors surveyed stayed overnight in the Santa Barbara area during their visit (32.4%). Of these overnight visitors, 24.0 percent stayed in a Santa Barbara area hotel, 5.3 percent stayed in a private residence and 1.9 percent stayed in private home rental. The percentage of visitors surveyed who stayed overnight in Santa Barbara is comparable to the findings in Q1 of the 2012 Visitor Profile study (32.4% for 2016/2017 vs. 35.4% for 2012). Day-trippers—including those staying in paid or private accommodations outside the Santa Barbara area and regional residents on leisure day trips—represented 67.6 percent of visitors surveyed.

Question: Where are you staying overnight on this visit to the Santa Barbara South Coast area? Base: All respondents. 398 responses (weighted).

Figure 3: Place of Stay

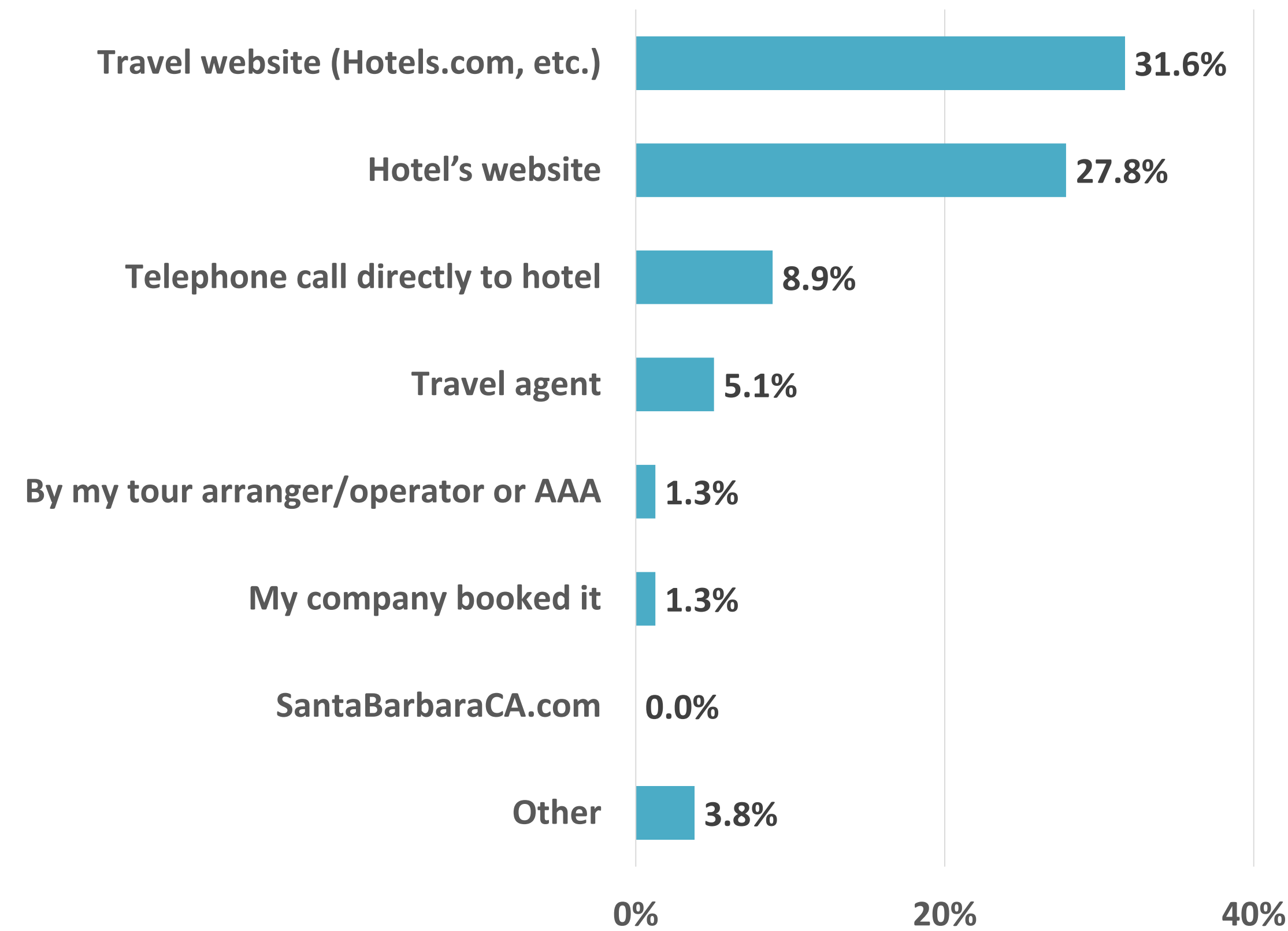


# Hotel Guests: Method of Booking Lodging Reservation (Intercept Survey)

Overnight visitors who stayed in paid accommodations in the Santa Barbara area typically booked their lodging through a travel website or directly through the hotel’s website. Survey respondents who reported staying overnight in commercial lodging in the Santa Barbara area were asked how they made their reservations. One-in-three visitors from this group booked their reservation through a travel website (31.6%). Another 27.8 percent made their reservation on the hotel’s website and 8.9 percent called their hotel directly.

Question: How was your Santa Barbara South Coast area lodging reservation(s) made? (Select all that apply) Base: Respondents staying overnight in a Santa Barbara hotel; intercept survey only. 79 responses (weighted).

Figure 4: Method of Booking Lodging Reservation



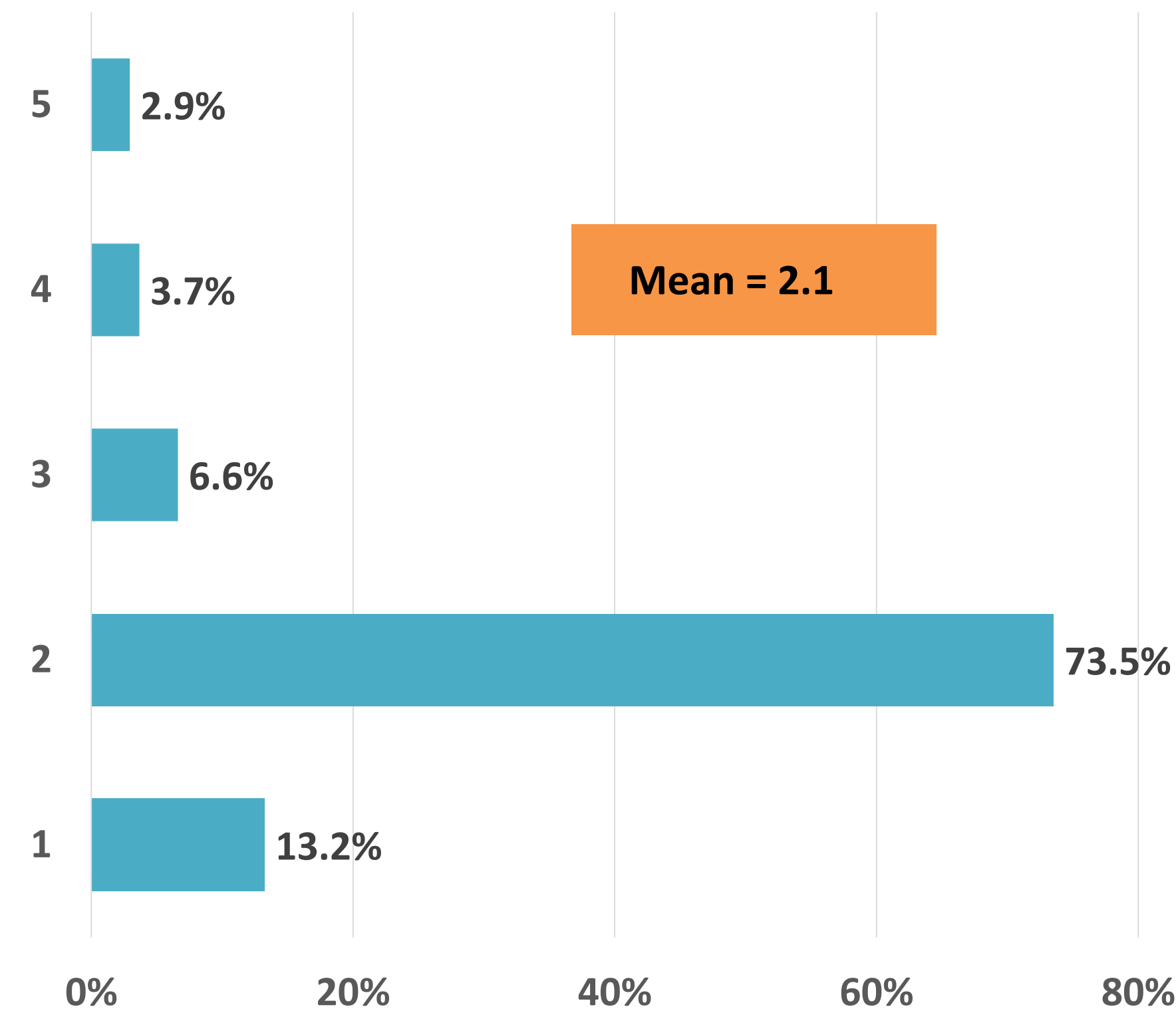


# Hotel Guests: Number of People in Hotel Room

The average Santa Barbara area hotel guest had 2.1 people in their room, including themselves. Visitors who stayed in a Santa Barbara area hotel were asked how many people, including themselves, stayed in their room. A large majority, 73.5 percent, stayed with one other person. 13.2 percent of this group were the sole occupant.

Question: Including yourself, how many people are staying/stayed in your hotel room? Base: Respondents staying overnight in a Santa Barbara hotel. 136 responses (weighted).

Figure 5: Number of People in Hotel Room

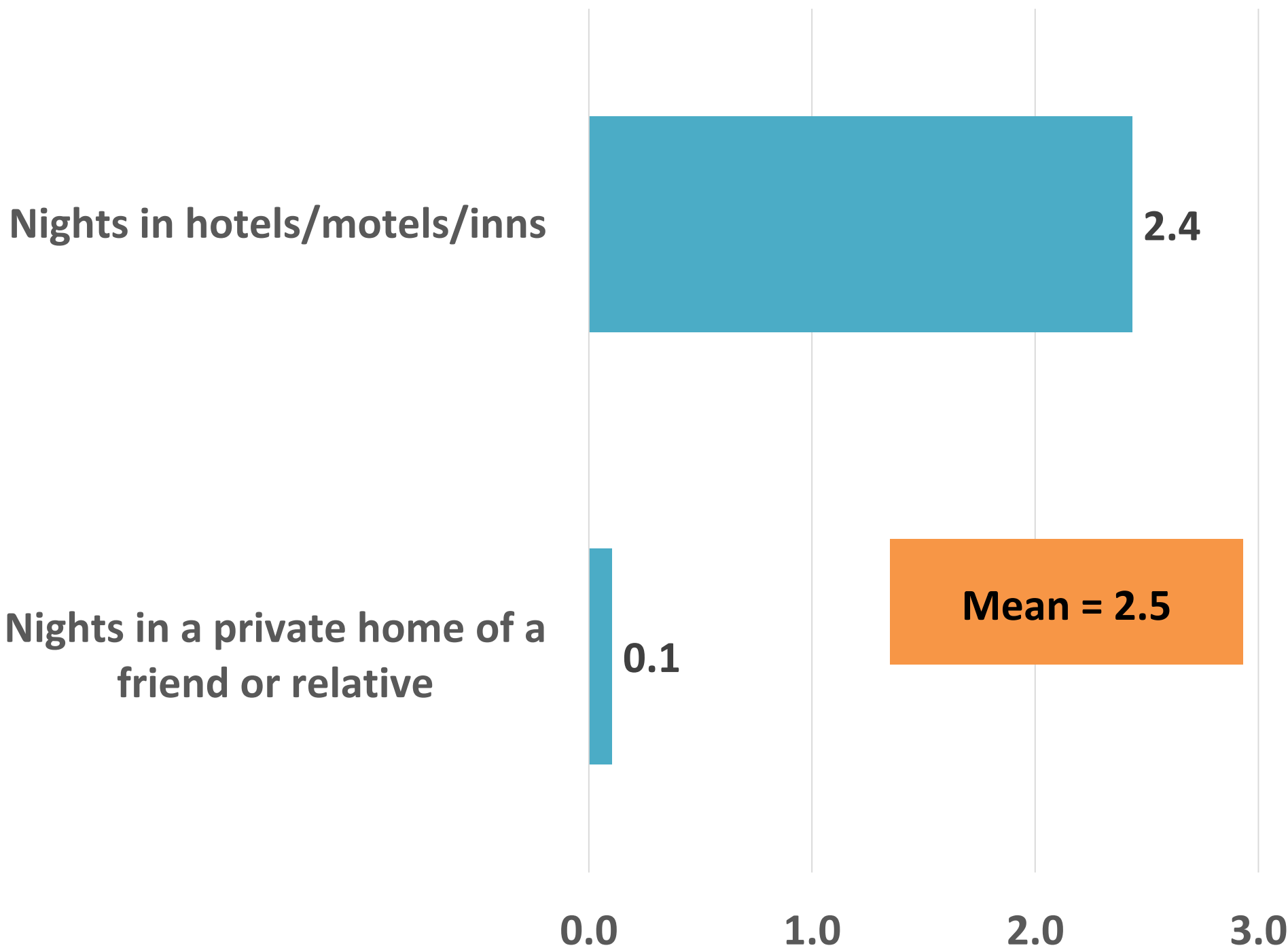


# Overnight Visitors: Total Nights Spent in Each Lodging Type (Hotel Guest Survey)

On average, visitors who stayed in a Santa Barbara area hotel spent **2.5 nights in the destination**. Visitors who stayed in a Santa Barbara area hotel were asked how many nights they spent in each primary accommodation type—friend/relative’s residence and hotel/motel. This group spent an average of 2.4 nights in a hotel and 0.1 nights in the private home of a friend or relative.

Question: While on this trip, how many total nights did you spend in hotels/motels/inns in the Santa Barbara South Coast area? Base: Hotel Guest Survey Respondents. 87 responses (weighted).

Figure 6: Total Nights Spent in Each Lodging Type



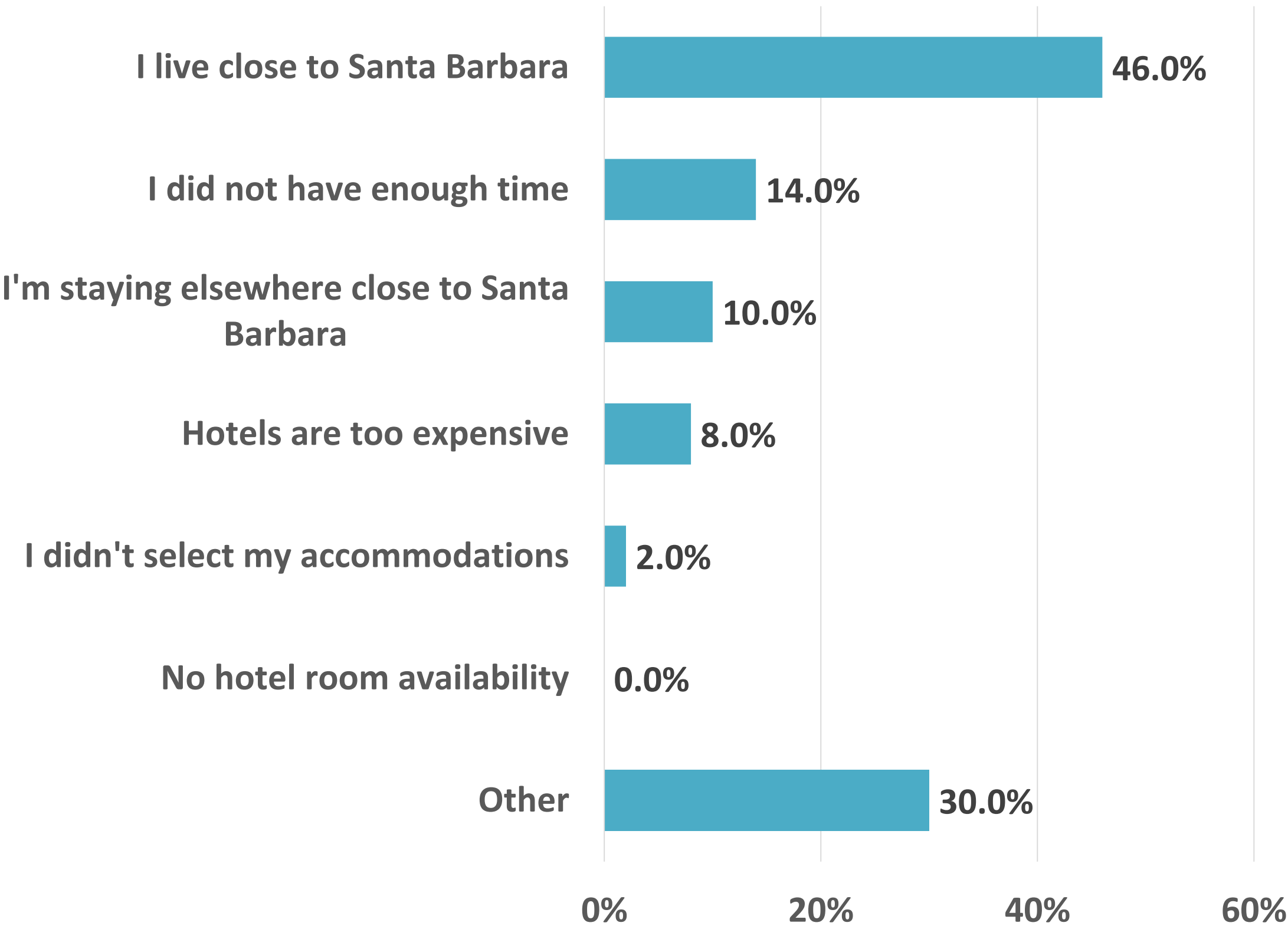


# Day Trip Visitors: Reasons for not Staying Overnight in Santa Barbara (Intercept Survey)

Over 40 percent of day-trip visitors surveyed said they did not stay overnight in the Santa Barbara area because they live close to the destination (46.0%). Another 14.0 percent cited “not having enough time” as their reason for not staying overnight in the area. Additionally, approximately one-in-ten were staying elsewhere close to Santa Barbara (10.0%) or felt hotels were too expensive (8.0%) to stay overnight in the destination.

Question: Why did you decide to not stay overnight in the Santa Barbara South Coast on this trip? (Select all that apply) Base: Respondents who did not stay overnight in the Santa Barbara area. 188 responses (weighted).

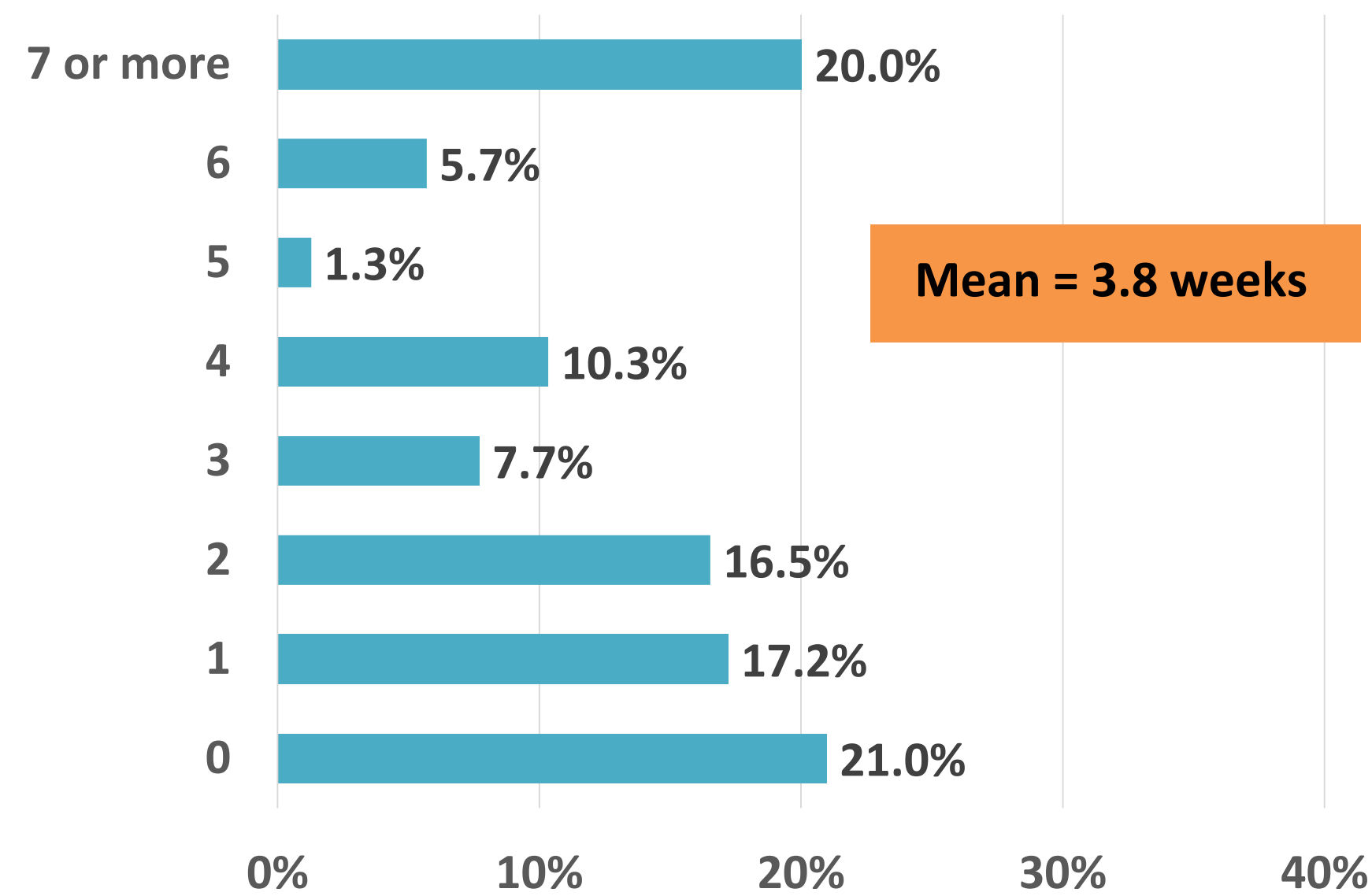
Figure 7: Reasons for not Staying Overnight in Santa Barbara



# Weeks of Advanced Trip Planning

The average trip planning period across all visitor segments is 3.8 weeks in advance of the trip. Hotel guests (6.3) and VFRs (4.3) have longer planning windows, with an average of 6.3 and 4.3 weeks of advance travel planning. In contrast, day-trip visitors planning window averaged 2.6 weeks, with three-in-ten of these visitors not doing any advanced planning for the Santa Barbara area trip (30.2%).

Figure 8: Weeks of Advanced Trip Planning



Base: All respondents. 293 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
7 or more	39.0%	24.0%	11.3%
6	6.5%	0.0%	5.7%
5	3.3%	8.0%	0.0%
4	16.3%	16.0%	7.5%
3	8.9%	8.0%	7.5%
2	9.8%	24.0%	18.9%
1	13.8%	12.0%	18.9%
0	2.4%	4.0%	30.2%
Mean	6.3	4.3	2.6
Sample size:	123	50	106

Question: How many weeks before leaving home did you begin planning this trip?



# Days & Nights in the Santa Barbara Area (Intercept Survey)

The average Santa Barbara area visitor surveyed between September and November of 2016 spent an average of 1.4 days and 0.5 nights in the area during their trip. Hotel guests had the longest length of stay averaging 3.2 days and 2.8 nights in the Santa Barbara area.

Figure 9: Days & Nights in the Santa Barbara Area

	Q1 Total
5 or more	3.4%
4	2.4%
3	5.3%
2	4.8%
1	84.1%
Mean # of Days	1.4
5 or more	3.2%
4	1.6%
3	3.9%
2	5.4%
1	7.0%
0	79.0%
Mean # of nights	0.5

Question: How many days and nights are you staying in Santa Barbara area? Base: All respondents. 318 responses (weighted).

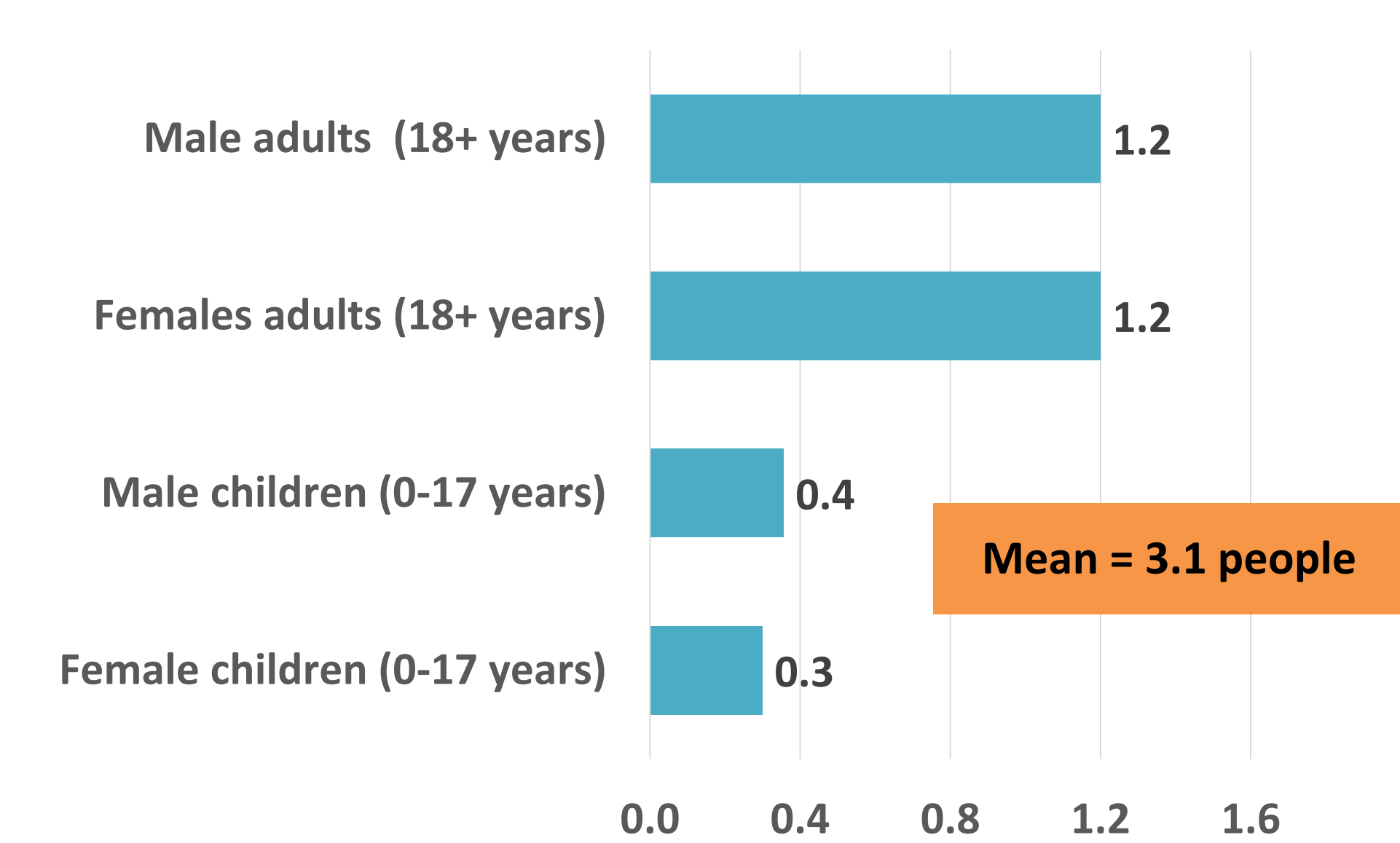
Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
5 or more	14.5%	23.5%	0.0%
4	16.4%	17.6%	0.0%
3	25.5%	35.3%	1.4%
2	23.6%	17.6%	1.4%
1	20.0%	5.9%	97.3%
Mean # of Days	3.2	3.1	1.0
5 or more	12.7%	23.5%	--
4	9.1%	17.6%	--
3	21.8%	11.8%	--
2	25.5%	29.4%	--
1	30.9%	17.6%	--
0	0.0%	0.0%	100.0%
Mean # of nights	2.8	2.7	0.0
Sample size:	55	34	146

# Travel Party Composition

Through the first quarter of the survey, the typical travel party to the Santa Barbara area was comprised of 3.1 persons. The average travel party included 1.2 adult females and 1.2 adult males. Day-trip visitors had an average travel party comprised of 3.4 people, while hotel guests had smaller travel parties – averaging 2.6 people. Approximately three-in-ten of all travel parties surveyed had children in them (29.3%). Day-trip visitors were the most likely to have children in their traveling party compared to the other visitor segments (37.5% for day-trip vs. 8.3% for hotel guests and 18.8% for VFRs).

Figure 10: Travel Party Composition



Base: All respondents. 385 responses (weighted).

Detail by Type of Visitor

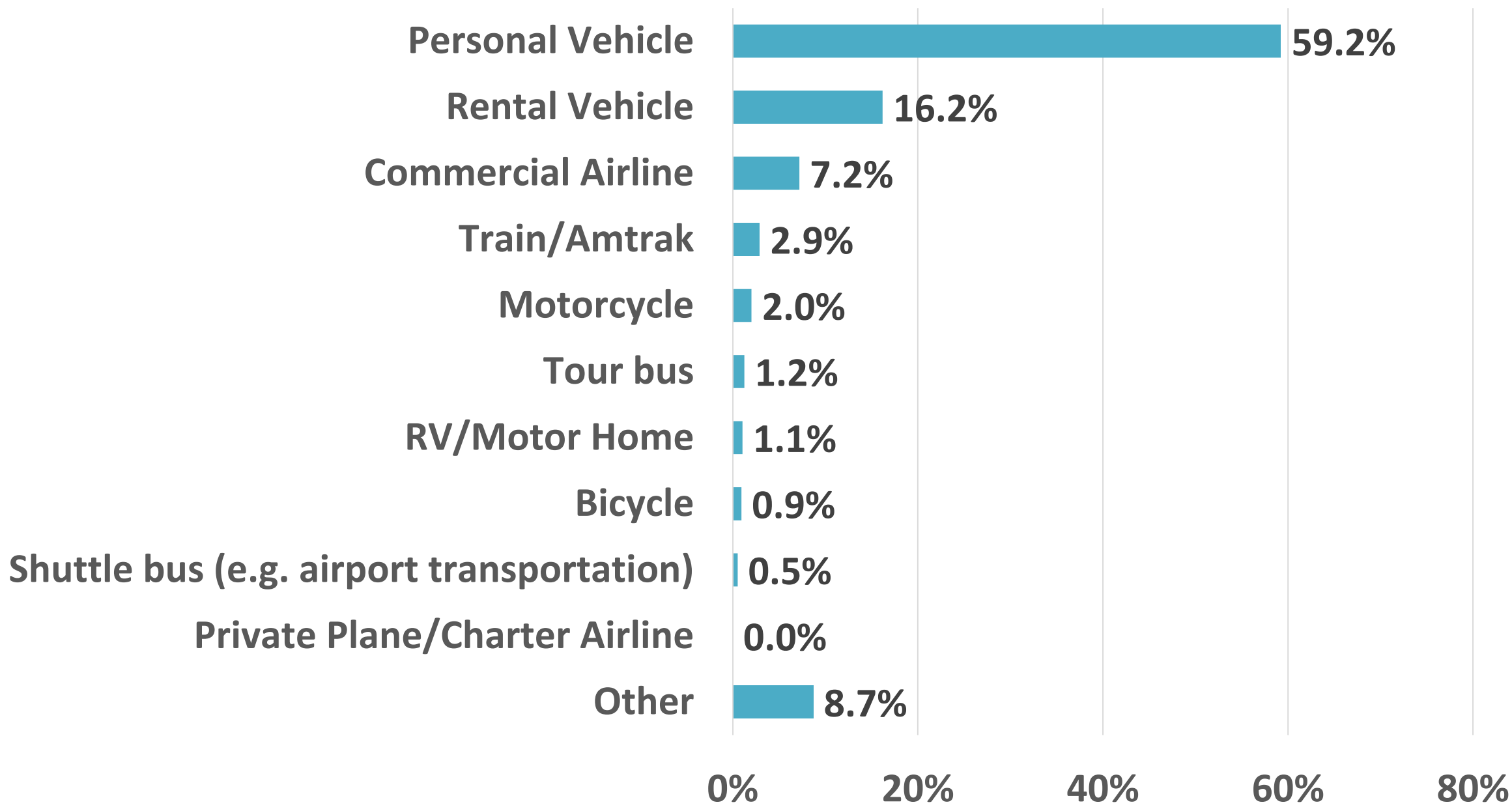
	Hotel Guest	VFR	Day Trip
Male adults (18+ years)	1.1	0.8	1.3
Female adults (18+ years)	1.3	0.7	1.2
Male children (17 years or under)	0.1	0.2	0.5
Female children (17 years or under)	0.1	0.1	0.4
% of travel parties with children	8.3%	18.8%	37.5%
Mean	2.6	1.8	3.4
Sample size:	145	64	144

Question: Please tell us how many people (including yourself) are in your immediate travel party.

# Method of Arrival

Three-quarters of visitors surveyed between September and November of 2016 arrived to the Santa Barbara area by car, either in a personal (59.2%) or rental vehicle (16.2%). The next most common method of arrival was commercial airline, reported by 7.2 percent of respondents.

Figure 11: Method of Arrival



Base: All respondents. 391 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Personal Vehicle	53.1%	62.5%	62.2%
Rental Vehicle	22.4%	12.5%	14.9%
Commercial Airline	14.0%	15.6%	4.1%
Train/Amtrak	6.3%	6.3%	1.4%
Motorcycle	0.7%	0.0%	2.7%
Tour bus	1.4%	0.0%	1.4%
RV/Motor Home	0.0%	0.0%	0.0%
Bicycle	0.0%	0.0%	1.4%
Shuttle bus (e.g. airport transportation)	0.7%	3.1%	0.0%
Private Plane/Charter Airline	0.0%	0.0%	0.0%
Other	1.4%	0.0%	12.2%
Sample size:	143	64	148

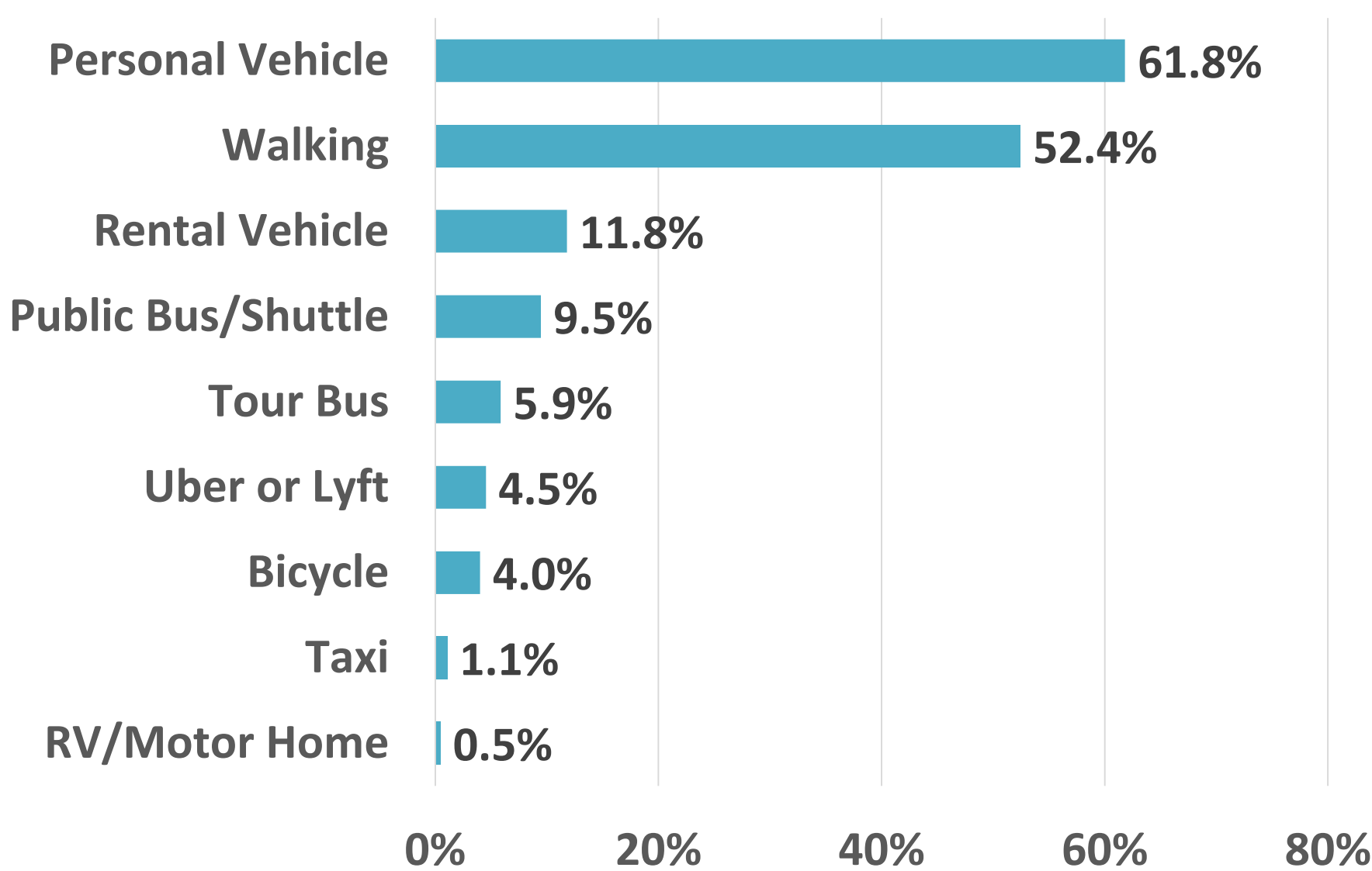
Question: How did you arrive in the Santa Barbara area area? (Select one)



# Transportation Used In-Market (Intercept Survey)

Nearly three-quarters of visitors surveyed used a personal or rental vehicle while in-market (73.6%). In addition, over half of visitors walked (52.4%), while another 9.5 percent used a public bus or shuttle to get around the Santa Barbara area. Ride-sharing services like Uber and Lyft were used by 4.5 percent, while taxis were used by 1.1 percent of visitors surveyed. Compared to other visitor types, hotel guest visitors were more likely to use a rental car (28.1%) and a public bus/shuttle (15.6%).

Figure 12: Transportation Used In-Market



Base: All respondents. 342 responses (weighted).

Detail by Type of Visitor

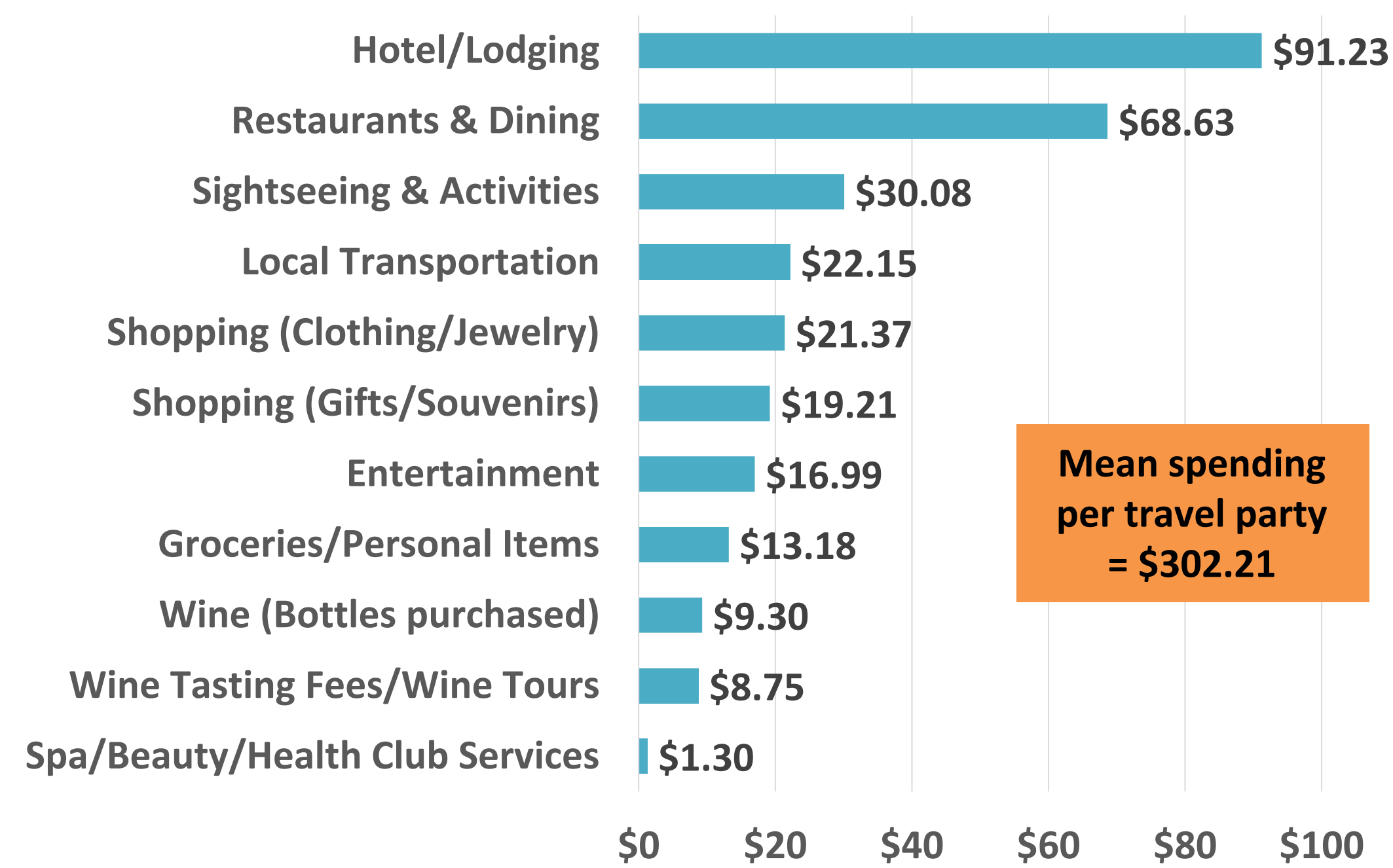
	Hotel Guest	VFR	Day Trip
Personal Vehicle	54.7%	75.8%	62.2%
Walking	54.7%	42.4%	54.1%
Rental Vehicle	28.1%	6.1%	9.5%
Public Bus/Shuttle	15.6%	9.1%	8.1%
Tour Bus	3.1%	3.0%	6.8%
Uber or Lyft	3.1%	12.1%	4.1%
Bicycle	6.3%	15.2%	2.7%
Taxi	0.0%	0.0%	1.4%
RV/Motor Home	0.0%	0.0%	0.0%
Sample size:	64	66	148

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

# Daily Spending, Per Travel Party

Through the first quarter of the survey, visiting travel parties to the Santa Barbara area spent an average of \$302.21 per day in the destination. A majority of this spending is attributed to lodging (\$91.23 across all visitor segments – Hotel guests spent an average of \$239.24 for lodging) and restaurants (\$68.63). Hotel guests represent the greatest visitor spend, averaging \$527.73 per day, per travel party. Overall spending is up significantly compared to findings in the 2012 Visitor Profile (\$255.75) with the most notable spending increases on lodging (\$91.23 in 2016 vs. \$64.07 in 2012), entertainment & sightseeing (\$47.07 in 2016 vs. \$19.32 in 2012) and local transportation (\$22.15 in 2016 and \$11.90 in 2012).

Figure 13: Daily Spending, Per Travel Party



Base: All respondents. 380 responses (weighted).

Detail by Type of Visitor

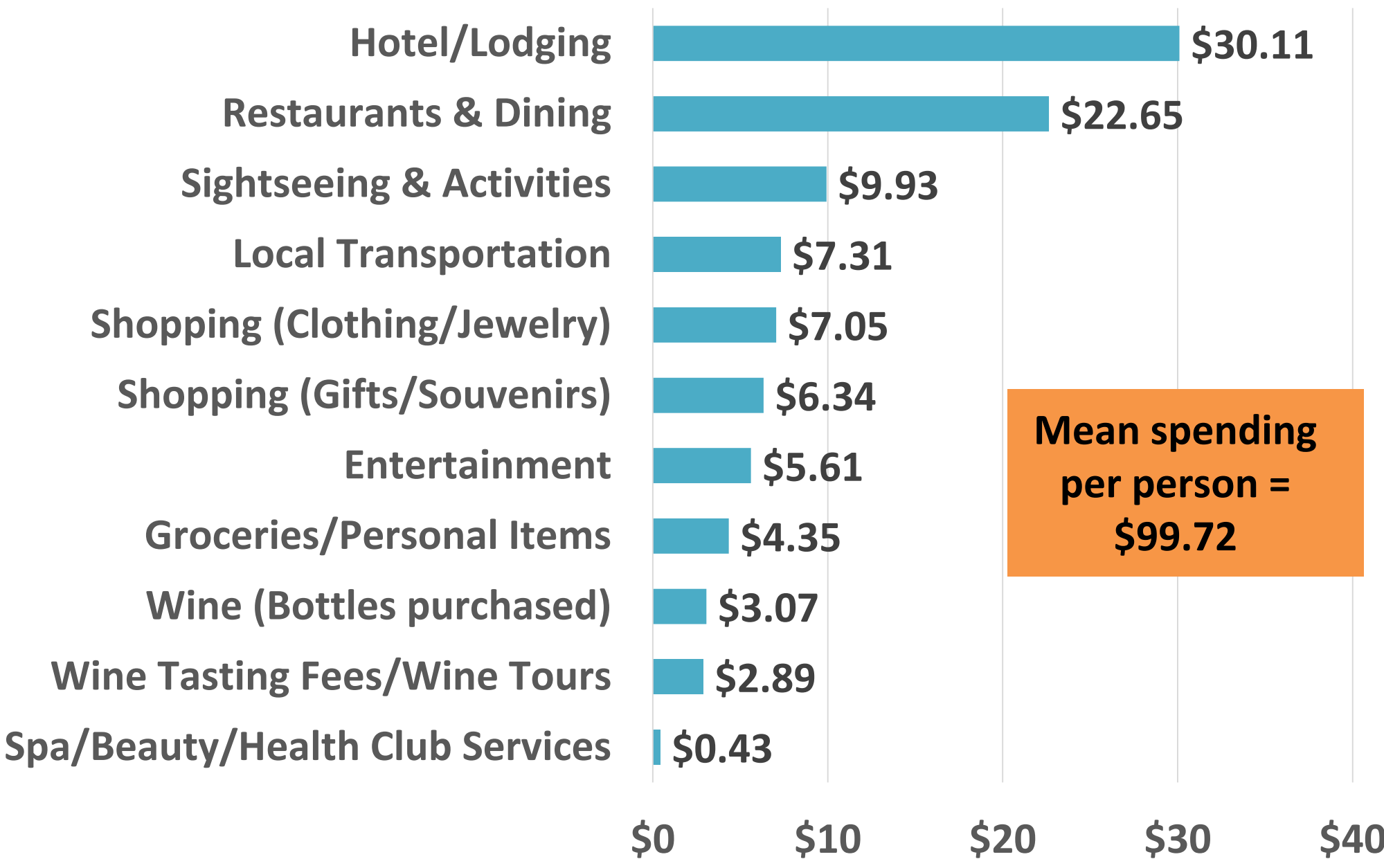
	Hotel Guest	VFR	Day Trip
Hotel/Lodging	\$239.24	\$0.00	\$0.00
Restaurants & Dining	\$121.24	\$83.94	\$48.69
Sightseeing & Activities	\$18.75	\$25.97	\$34.56
Local Transportation	\$16.94	\$27.48	\$23.37
Shopping (Clothing/Jewelry)	\$42.60	\$66.61	\$11.30
Shopping (Gifts/Souvenirs)	\$21.32	\$38.65	\$17.37
Entertainment	\$21.94	\$14.90	\$14.63
Groceries/Personal Items	\$14.49	\$32.26	\$11.15
Wine (Bottles purchased)	\$12.13	\$17.74	\$7.46
Wine Tasting Fees/Wine Tours	\$14.63	\$18.06	\$4.79
Spa/Beauty/Health Club Services	\$4.44	\$5.00	\$0.00
Mean spending per travel party:	\$527.73	\$330.61	\$173.33
Sample size:	144	62	142

Question: How much PER DAY did (or will) your immediate party spend on each of the following while in the Santa Barbara South Coast area?

# Daily Spending, Per Person

It is estimated that the average Santa Barbara area visitor represents \$99.72 in daily in-market spending. This is based on the reported daily spending of \$302.21 covering an average of 3.0 travelers. When comparing these findings to the 2012 Visitor Profile, per person daily spending in Santa Barbara for Hotel Guests has increased considerably (\$221.20 for 2016 and \$200.30 for 2012).

Figure 14: Daily Spending, Per Person



Base: All respondents. 380 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Hotel/Lodging	\$100.28	\$0.00	\$0.00
Restaurants & Dining	\$50.82	\$44.97	\$14.43
Sightseeing & Activities	\$7.86	\$13.91	\$10.25
Local Transportation	\$7.10	\$14.72	\$6.93
Shopping (Clothing/Jewelry)	\$17.86	\$35.69	\$3.35
Shopping (Gifts/Souvenirs)	\$8.94	\$20.70	\$5.15
Entertainment	\$9.20	\$7.98	\$4.34
Groceries/Personal Items	\$6.07	\$17.28	\$3.31
Wine (Bottles purchased)	\$5.09	\$9.50	\$2.21
Wine Tasting Fees/Wine Tours	\$6.13	\$9.68	\$1.42
Spa/Beauty/Health Club Services	\$1.86	\$2.68	\$0.00
Mean # of people covered by spending:	2.4	1.9	3.4
Mean spending per travel party:	\$221.20	\$177.11	\$51.39
Sample size:	144	62	142

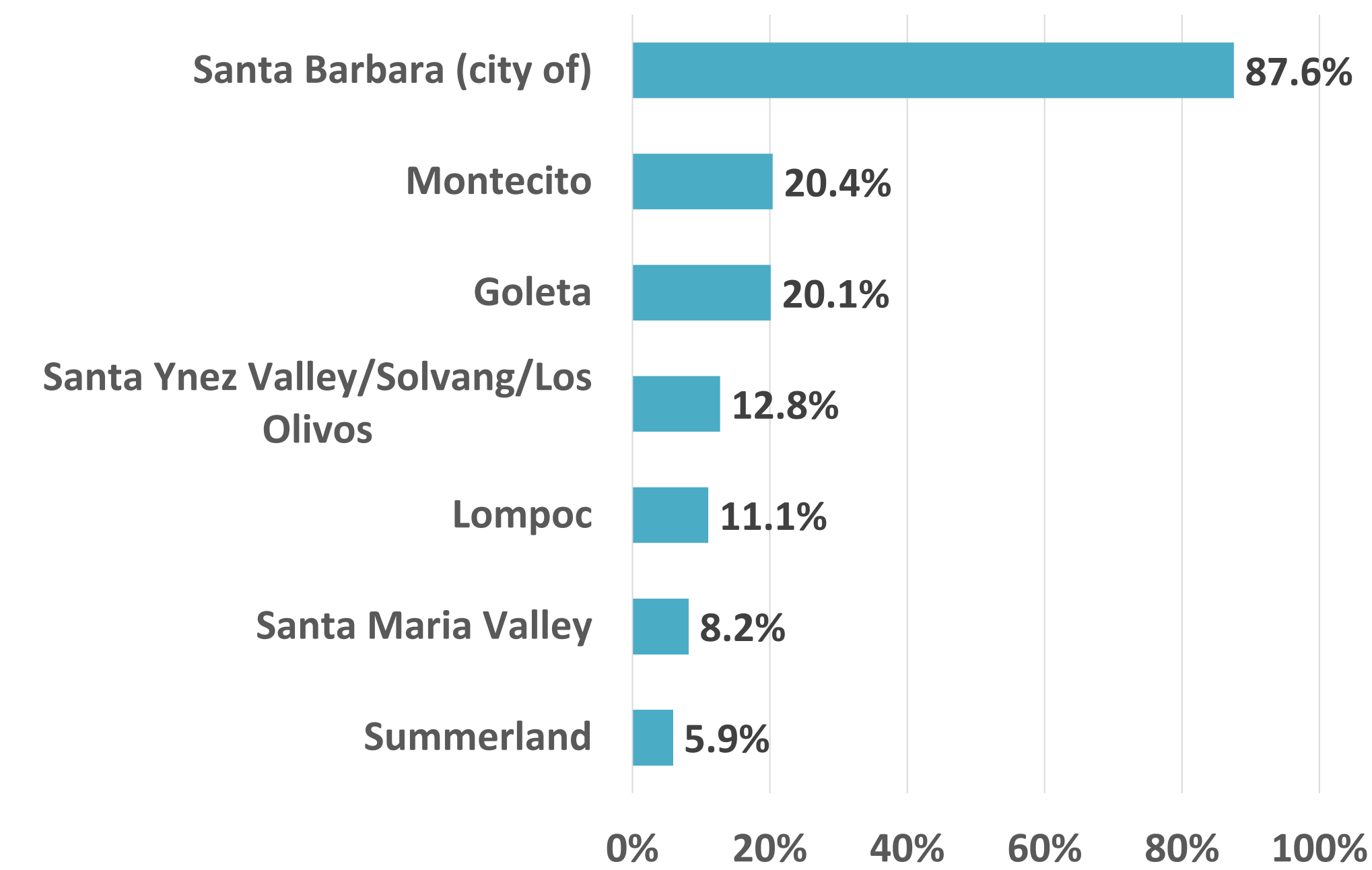
Question: How many persons' travel expenses does this spending fully cover?



# Santa Barbara County Areas Visited

Visitors surveyed between September and November of 2016 were most likely to have visited the city of Santa Barbara, Montecito and Goleta during their trip. Survey respondents were asked which Santa Barbara County areas and towns they visited. A large majority visited the city of Santa Barbara (87.6%) while one-in-five visited Montecito (20.4%) and Goleta (20.1%). Hotel guests were the most likely to visit the city of Santa Barbara and the Santa Ynez Valley compared to the other visitor segments.

Figure 15: Santa Barbara County Areas Visited



Base: All respondents. 396 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Santa Barbara (city of)	91.4%	84.8%	86.5%
Montecito	15.9%	33.3%	21.6%
Goleta	15.9%	48.5%	17.6%
Santa Ynez Valley/Solvang/Los Olivos	16.6%	9.1%	10.8%
Lompoc	6.6%	15.2%	12.2%
Santa Maria Valley	5.3%	6.1%	9.5%
Summerland	6.0%	15.2%	5.4%
Sample size:	151	66	148

Question: On this trip, which of these Santa Barbara County areas and towns did you visit? (Select all that apply)

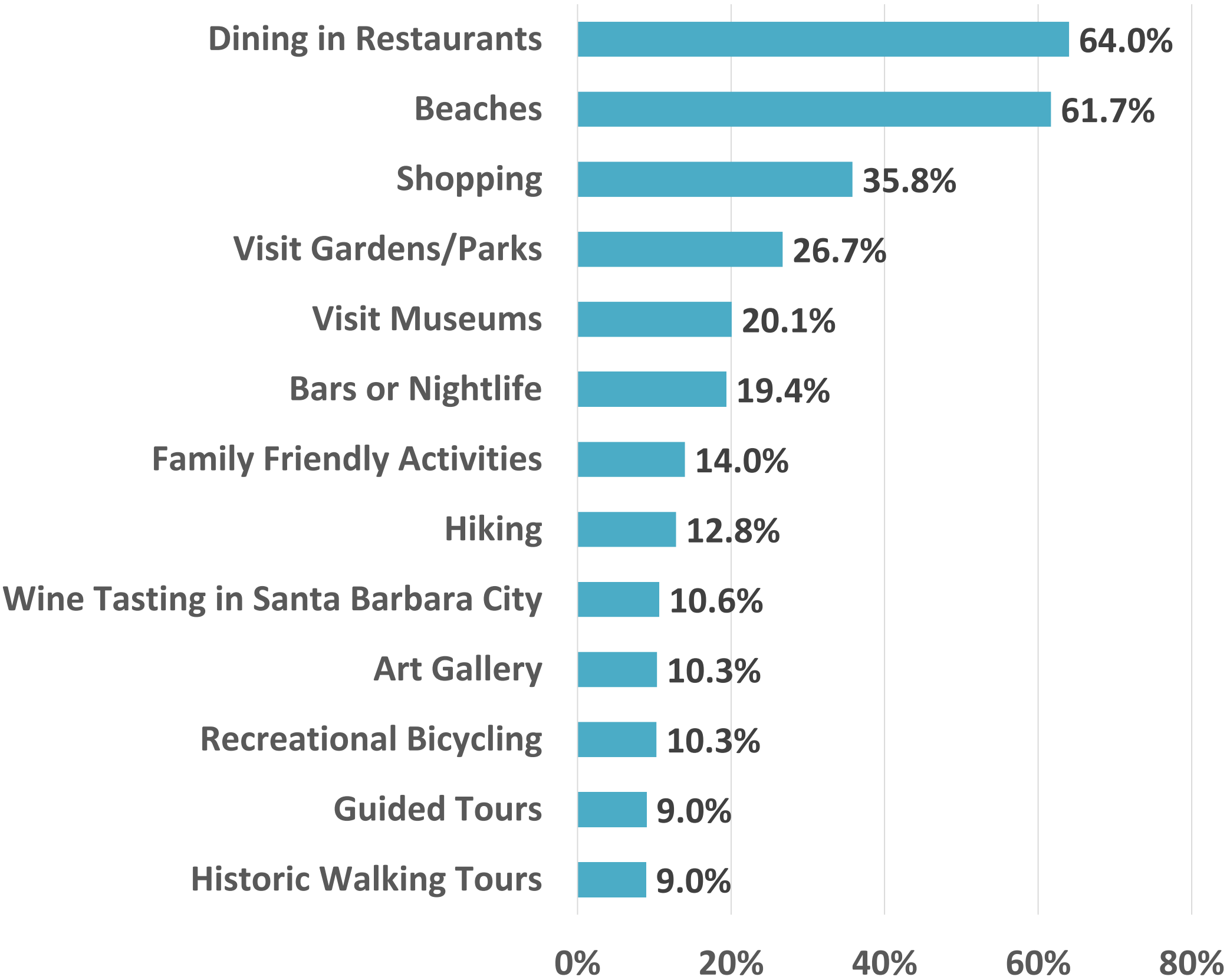
# Activities Participated in while in the Santa Barbara Area

Visitors surveyed between September and November of 2016 participated in a variety of activities while in the Santa Barbara area. Visitors surveyed were presented with a list of activities and asked which they participated in during their time in the Santa Barbara area. The chart to the right shows the top activities visitors participated in during their trip. Of these, dining in restaurants (64.0%) and going to the beach (61.7%) were, by far, the most popular activities amongst Santa Barbara area visitors. These were followed by shopping (35.8%), visiting gardens or parks (26.7%), visiting museums (20.1%) and bars or nightlife (19.4%). In comparing these findings to Q1 of the 2012 Visitor Profile we see that a notably higher percentage of Hotel Guests surveyed in 2016 participated in wine tasting in Santa Barbara City (15.9% in 2016 –see data on next page vs. 10.1% in 2012).

*The full list of activities tested are shown in a table segmented by visitor place of stay on the next page.*

Question: On this trip, which of the following activities did you (or will you) participate in while in Santa Barbara South Coast area? (Select all that apply)  
Base: All respondents. 396 responses (weighted).

Figure 16: Top Activities Participated in while in the Santa Barbara Area



# Activities – Full Detail

	Hotel Guest	VFR	Day Trip
Dining in Restaurants	78.1%	63.6%	58.1%
Beaches	62.3%	72.7%	59.5%
Shopping	47.7%	54.5%	29.7%
Visit Gardens/Parks	22.5%	24.2%	28.4%
Visit Museums	22.5%	24.2%	18.9%
Bars or Nightlife	21.9%	36.4%	16.2%
Family Friendly Activities	12.6%	24.2%	12.2%
Hiking	15.9%	30.3%	9.5%
Wine Tasting in Santa Barbara City	15.9%	18.2%	8.1%
Art Gallery	9.3%	15.2%	10.8%
Recreational Bicycling	12.6%	18.2%	8.1%
Guided Tours	11.3%	12.1%	8.1%
Historic Walking Tours	13.2%	6.1%	8.1%
View Theater/Performing Arts	11.9%	18.2%	5.4%
Beer Tasting	7.9%	9.1%	5.4%
Kayaking	3.3%	18.2%	4.1%
Surfing / Stand-up Paddle Boarding	2.0%	12.1%	4.1%
Special Event or Festival	10.6%	9.1%	1.4%
Whale watching	2.6%	6.1%	4.1%
Wine Tasting in Santa Ynez Valley	7.9%	0.0%	1.4%
Sailing	1.3%	3.0%	2.7%
Visit Spa	3.3%	0.0%	1.4%
Sports Tournament or Event	2.0%	0.0%	1.4%
Channel Islands excursion	0.7%	0.0%	1.4%
Wine Tasting in Lompoc	2.6%	0.0%	0.0%
Golfing	0.7%	0.0%	0.0%
Wine Tasting in Santa Maria Valley	1.3%	0.0%	0.0%
Cycling (Organized Tour, Event, Race or Independent Touring)	1.3%	0.0%	0.0%
<b>Sample size:</b>	<b>151</b>	<b>66</b>	<b>148</b>

## Detail by Type of Visitor

**Question:** On this trip, which of the following activities did you (or will you) participate in while in the Santa Barbara South Coast area? (Select all that apply)

Base: All respondents. 396 responses (weighted).



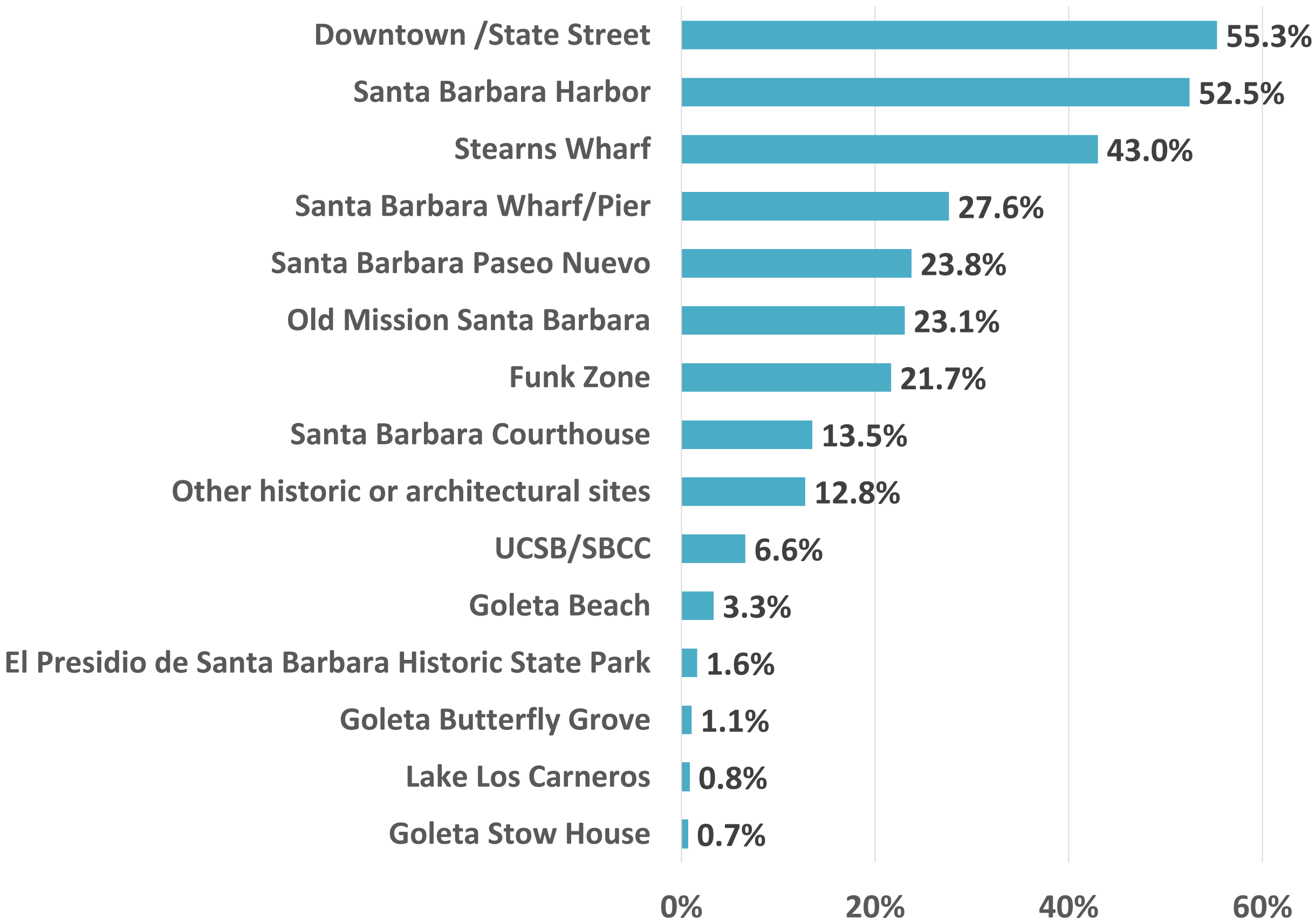
# Attractions Visited while in the Santa Barbara Area

Santa Barbara area visitors surveyed between September and November 2016 went to many area attractions while in the destination. Presented with a list of 15 Santa Barbara area sites and attractions, respondents were asked to identify which they had or planned to visit during their trip. The most frequented attractions were Downtown/State Street (55.3%), Santa Barbara Harbor (52.5%) and Stearns Wharf (43.0%). Approximately one-quarter of survey respondents also visited the Santa Barbara Wharf/Pier (27.6%), Santa Barbara Paseo Nuevo (23.8%) and Old Mission Santa Barbara (23.1%). Compared to findings in the 2012 Visitor Profile we see that Downtown/State Street continues to be one of the top frequented attractions in Santa Barbara.

*The full list of sites and attractions tested are shown in a table segmented by visitor place of stay on the next page.*

Question: On this trip, which of the following did you (or will you) visit while in Santa Barbara area? (Select all that apply) Base: All respondents. 396 responses (weighted).

Figure 17: Attractions Visited while in the Santa Barbara area



# Attractions Visited – Complete Detail

## Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Downtown/State Street	71.5%	84.8%	45.9%
Santa Barbara Harbor	58.9%	60.6%	48.6%
Stearns Wharf	53.0%	60.6%	36.5%
Santa Barbara Wharf/Pier	38.4%	45.5%	21.6%
Santa Barbara Paseo Nuevo	23.2%	36.4%	21.6%
Old Mission Santa Barbara	31.8%	48.5%	17.6%
Funk Zone	18.5%	42.4%	20.3%
Santa Barbara Courthouse	17.2%	24.2%	10.8%
Other historic or architectural sites	6.6%	0.0%	16.2%
UCSB/SBCC	7.3%	24.2%	4.1%
Goleta Beach	4.6%	9.1%	1.4%
El Presidio de Santa Barbara Historic State Park	5.3%	3.0%	0.0%
Goleta Butterfly Grove	1.3%	6.1%	0.0%
Lake Los Carneros	0.7%	9.1%	0.0%
Goleta Stow House	0.7%	6.1%	0.0%
<b>Sample size:</b>	<b>151</b>	<b>66</b>	<b>148</b>

**Question:** On this trip, which of the following did you (or will you) visit while in the Santa Barbara South Coast area? (Select all that apply)

Base: All respondents. 396 responses (weighted).

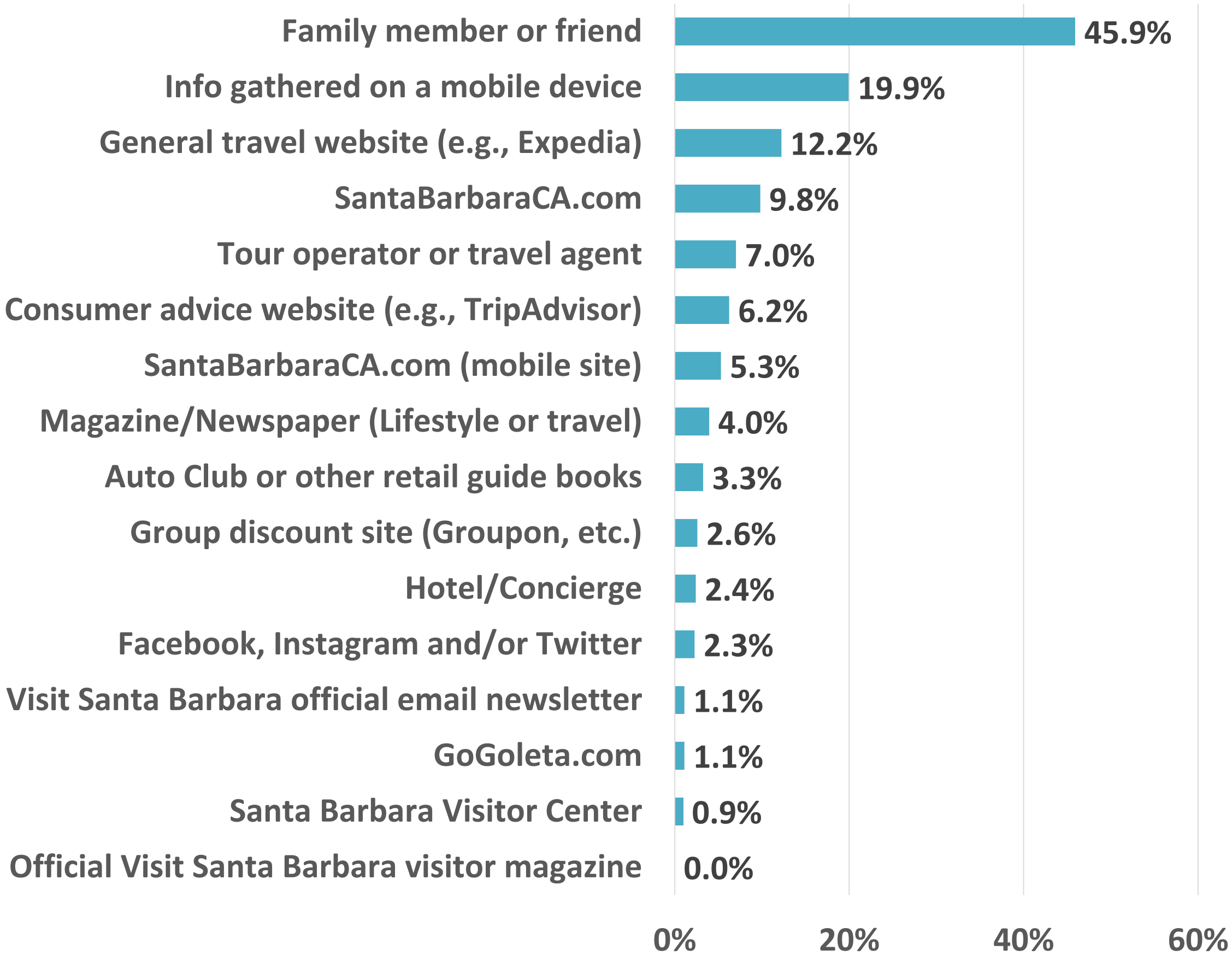
# Travel Planning Resources Used Before Arrival

Before arriving in the Santa Barbara area, 45.9 percent of visitors used the opinions of friends or relatives as a resource to plan their trip. This was followed by information gathered on a mobile device (19.9%), general travel websites such as Expedia (12.2%) and SantaBarbaraCA.com (9.8% full site – 5.3% mobile site). Additionally, 1.1 percent of visitors surveyed used the Visit Santa Barbara official email newsletter to plan their trip before arriving to the destination. In comparing these findings to the 2012 Visitor Profile, use of the official Santa Barbara visitor website amongst Hotel Guests is comparable with approximately one-in-five using the site as a travel planning resource before arrival in both years (18.1% for 2016 and 19.2% in 2012).

*The full list of travel planning resources tested prior to arrival are shown in a table segmented by visitor place of stay on the next page.*

Question: Which of the following did you use specifically to plan your trip BEFORE ARRIVING and which did you use while IN the Santa Barbara South Coast? (Select all that apply) Base: All respondents. 384 responses (weighted).

Figure 18: Travel Planning Resources Used Before Arrival





# Travel Planning Resources Used Before Arrival – Complete Detail

## Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Family member or friend	24.2%	81.8%	50.7%
Info gathered on a mobile device	22.1%	9.1%	19.7%
General travel website (e.g., Expedia)	20.8%	3.0%	9.9%
SantaBarbaraCA.com	18.1%	9.1%	7.0%
Tour operator or travel agent	4.0%	3.0%	8.5%
Consumer advice website (e.g., TripAdvisor)	13.4%	3.0%	4.2%
SantaBarbaraCA.com (mobile site)	5.4%	0.0%	5.6%
Magazine/Newspaper (Lifestyle or travel)	0.7%	0.0%	5.6%
Auto Club or other retail guide books	8.7%	0.0%	1.4%
Group discount site (Groupon, etc.)	2.0%	0.0%	2.8%
Hotel/Concierge	10.1%	0.0%	0.0%
Facebook, Instagram and/or Twitter	4.0%	12.1%	0.0%
Visit Santa Barbara official email newsletter	0.7%	0.0%	1.4%
GoGoleta.com	0.7%	0.0%	1.4%
Santa Barbara Visitor Center	0.0%	0.0%	1.4%
Official Visit Santa Barbara visitor magazine	0.0%	0.0%	0.0%
<b>Sample size:</b>	<b>149</b>	<b>66</b>	<b>142</b>

**Question:** Which of the following did you use specifically to plan your trip BEFORE ARRIVING and which did you use while IN the Santa Barbara South Coast? (Select all that apply)

Base: All respondents. 384 responses (weighted).

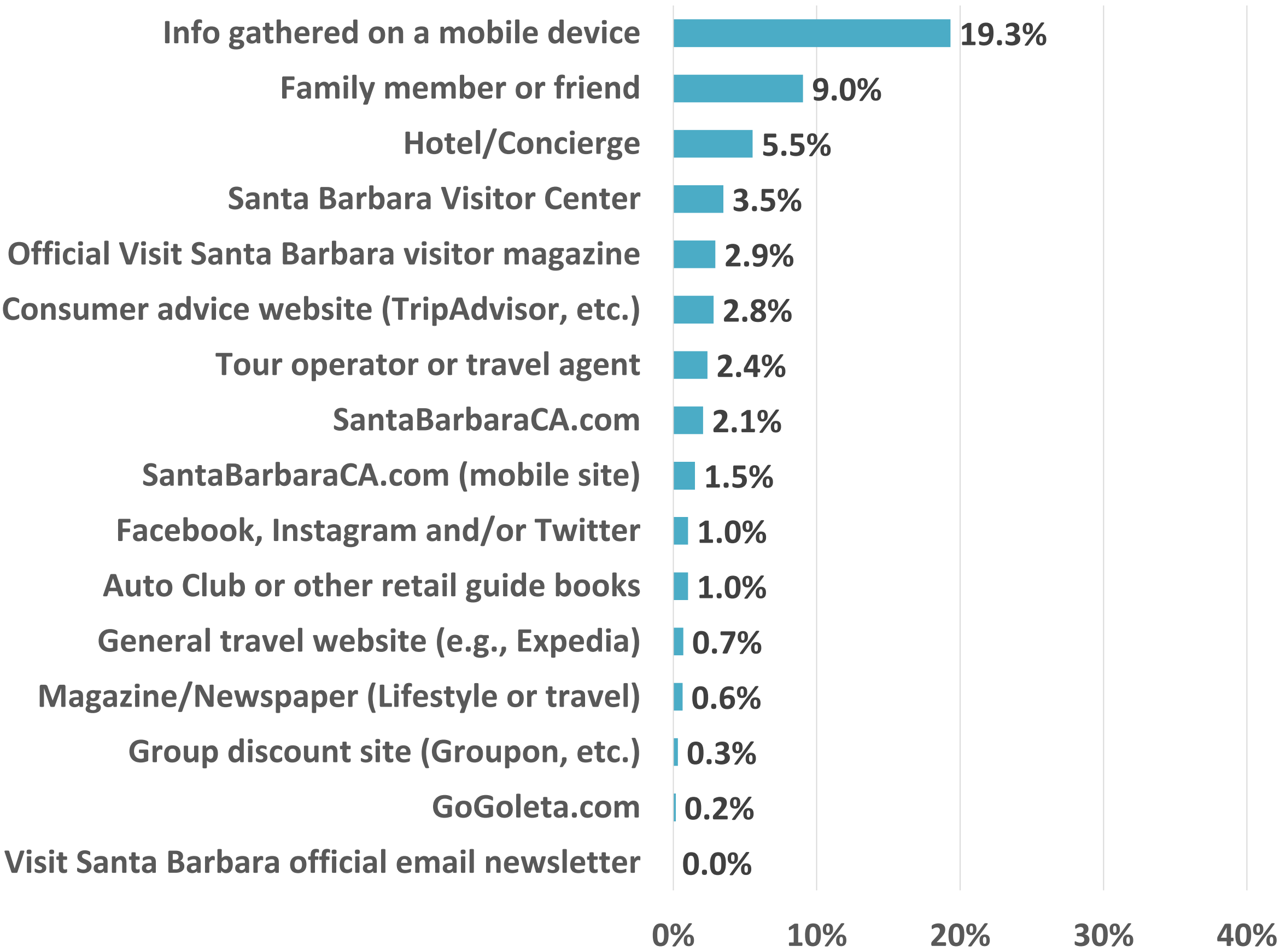
# Travel Planning Resources Used In-Market

Visitors surveyed were most likely to use information gathered on mobile devices and the opinions of friends or relatives for trip planning while in-market. While in the Santa Barbara area, one-in-five visitors surveyed gathered trip planning information on a mobile device (19.3%) and nearly one-in-ten used the opinions of their family or friends (9.0%). The next most utilized resources were the hotel concierge (5.5%), Santa Barbara Visitor Center (3.5%) and official Visit Santa Barbara visitor magazine (2.9%).

The full list of travel planning resources tested used in market are shown in a table segmented by visitor place of stay on the next page

Question: Which of the following did you use specifically to plan your trip BEFORE ARRIVING and which did you use while IN the Santa Barbara South Coast? (Select all that apply) Base: All respondents. 384 responses (weighted).

Figure 19: Travel Planning Resources Used In-Market



# Travel Planning Resources Used In-Market – Complete Detail

## Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Info gathered on a mobile device	22.1%	15.2%	18.3%
Family member or friend	8.1%	18.2%	8.5%
Hotel/Concierge	22.1%	0.0%	0.0%
Santa Barbara Visitor Center	2.7%	0.0%	4.2%
Official Visit Santa Barbara visitor magazine	7.4%	0.0%	1.4%
Consumer advice website (e.g., TripAdvisor, etc.)	8.7%	9.1%	0.0%
Tour operator or travel agent	2.0%	0.0%	2.8%
SantaBarbaraCA.com	4.7%	0.0%	1.4%
SantaBarbaraCA.com (mobile site)	4.7%	3.0%	0.0%
Santa Barbara Visitor Center	2.7%	0.0%	4.2%
Facebook, Instagram and/or Twitter	2.0%	6.1%	0.0%
Auto Club or other retail guide books	2.7%	3.0%	0.0%
General travel website (e.g., Expedia)	2.0%	0.0%	0.0%
Magazine and/or Newspaper (Lifestyle or travel)	2.7%	0.0%	0.0%
Group discount site (Groupon, etc.)	1.3%	0.0%	0.0%
GoGoleta.com	0.7%	0.0%	0.0%
Visit Santa Barbara official email newsletter	0.0%	0.0%	0.0%
<b>Sample size:</b>	<b>149</b>	<b>66</b>	<b>142</b>

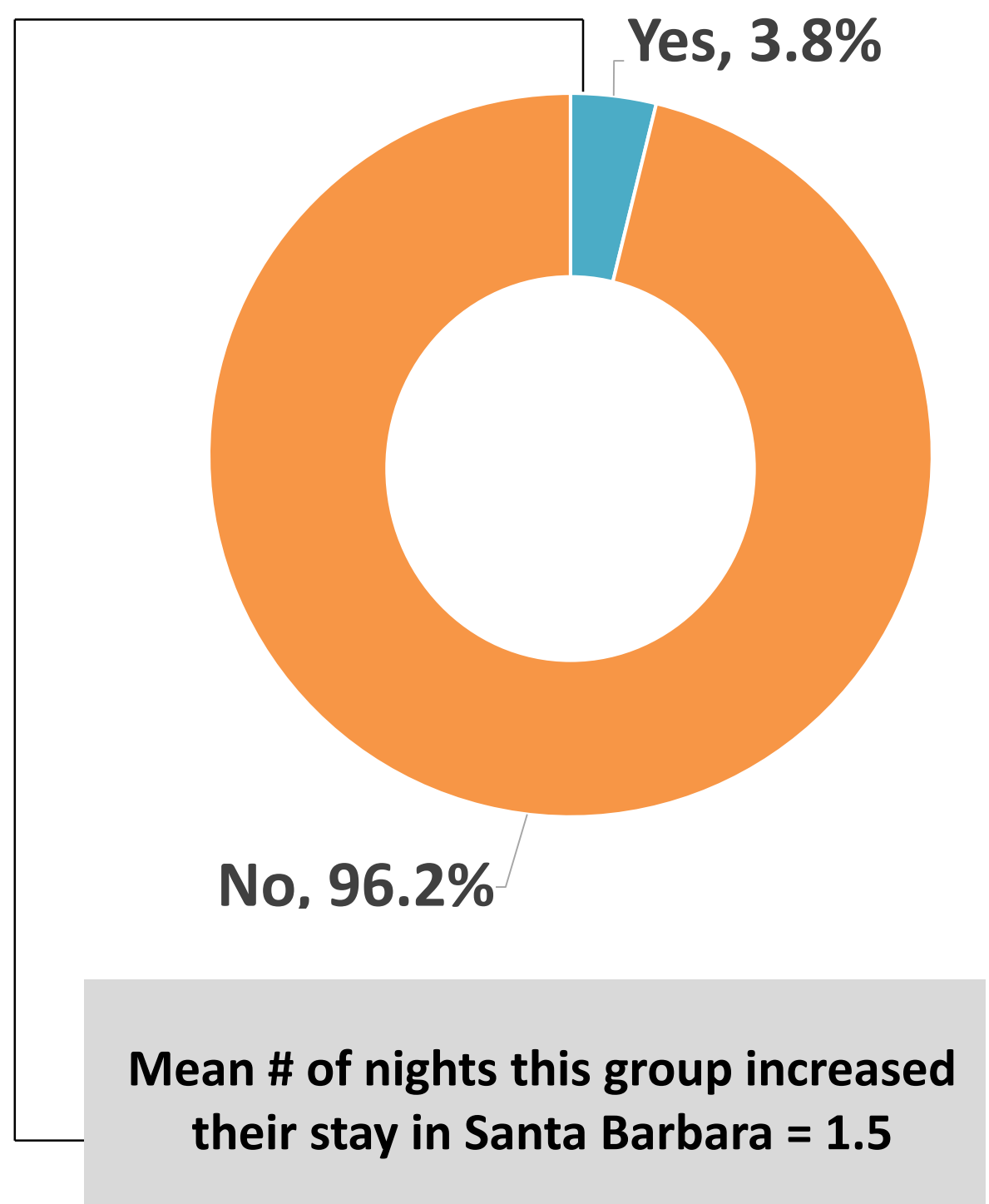
**Question:** Which of the following did you use specifically to plan your trip BEFORE ARRIVING and which did you use while IN the Santa Barbara South Coast? (Select all that apply)

Base: All respondents. 384 responses (weighted).

# Extended Stay in Santa Barbara Area based on Information Accessed In-Market (Intercept Survey)

A small proportion of visitors to the Santa Barbara area extended their stay in the destination by an average of 1.5 nights in response to information accessed while in the destination. Visitors surveyed were asked if any information they accessed while in the Santa Barbara area caused them to extend their stay in the destination. In total, 3.8 percent of respondents said they indeed extended their stay by an average of 1.5 nights. Hotel guests extended their stay an average of 2.4 nights, higher than the 1.0 nights reported by VFR visitors. *(Please note the small sample size. This data should be considered informational not directional.)*

Figure 20: Extended Stay in Santa Barbara Area based on Information Accessed In-Market



Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Yes	7.4%	7.1%	2.9%
No	92.6%	92.9%	97.1%
Mean # of days SB trip was extended	2.4	1.0	1.0
Sample size:	68	28	70

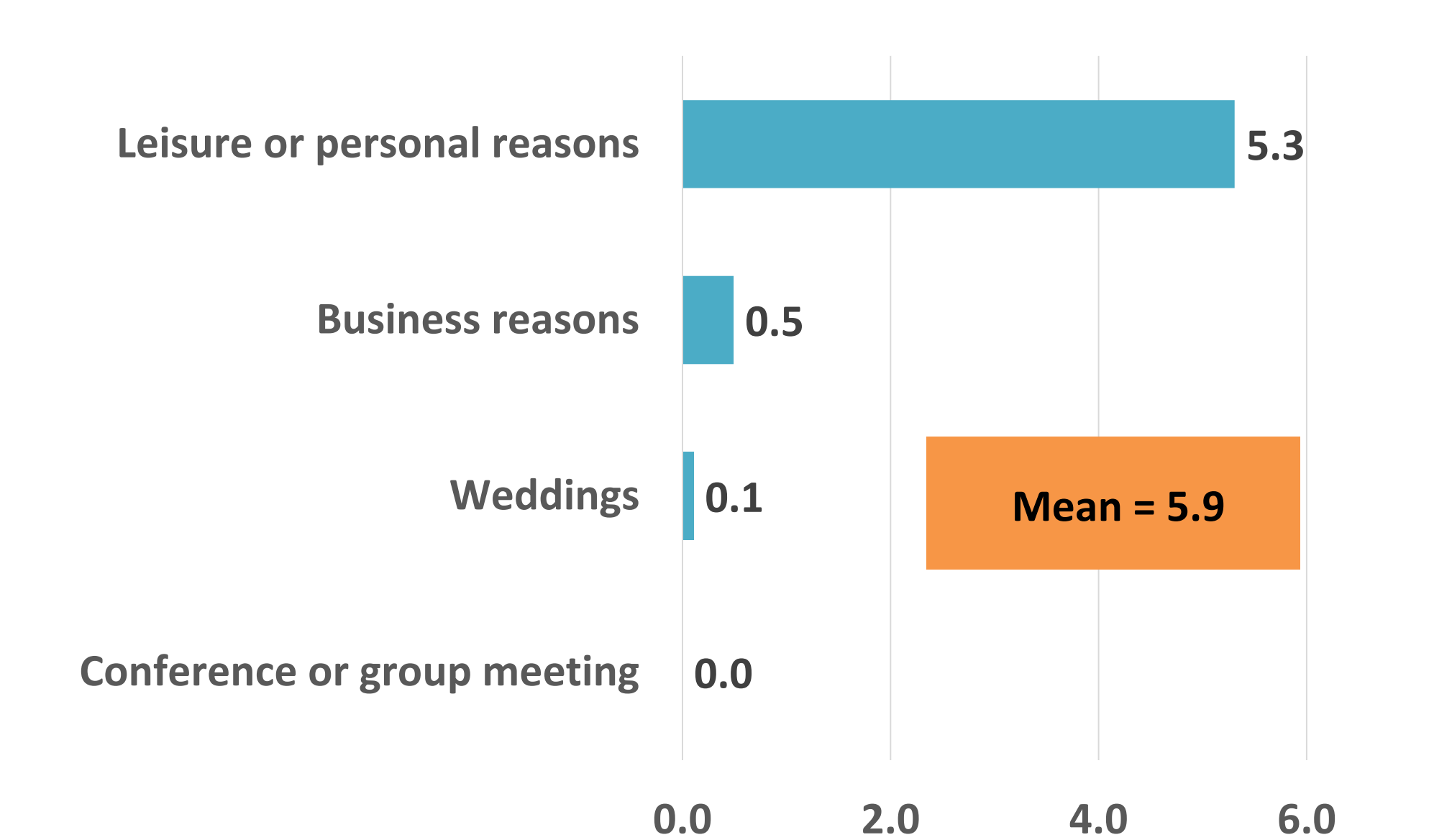
Questions: 1. Did any information you accessed while in the area cause you to extend your stay in the Santa Barbara South Coast? 2. If YES (above), by how many nights?  
Base: All respondents. 327 responses (weighted).



# Number of Visits to the Santa Barbara Area in the Past 12 Months (Intercept Survey)

The Santa Barbara South Coast area appears to draw a significant amount of repeat visitation. The average Santa Barbara area visitor surveyed between September and November of 2016 made 5.9 trips to the Santa Barbara area in the past twelve months, primarily for leisure or personal reasons (5.3 trips). Repeat visitation is largely driven by day-trip visitors (6.6 trips) and VFRs (4.8 trips). Hotel guests report an average of 2.7 visits to the area in the past twelve months , which has increased from 1.6 visits in 2012.

Figure 21: Number of Visits to the Santa Barbara Area in the Past 12 Months



Base: All respondents. 220 responses (weighted).

Detail by Type of Visitor

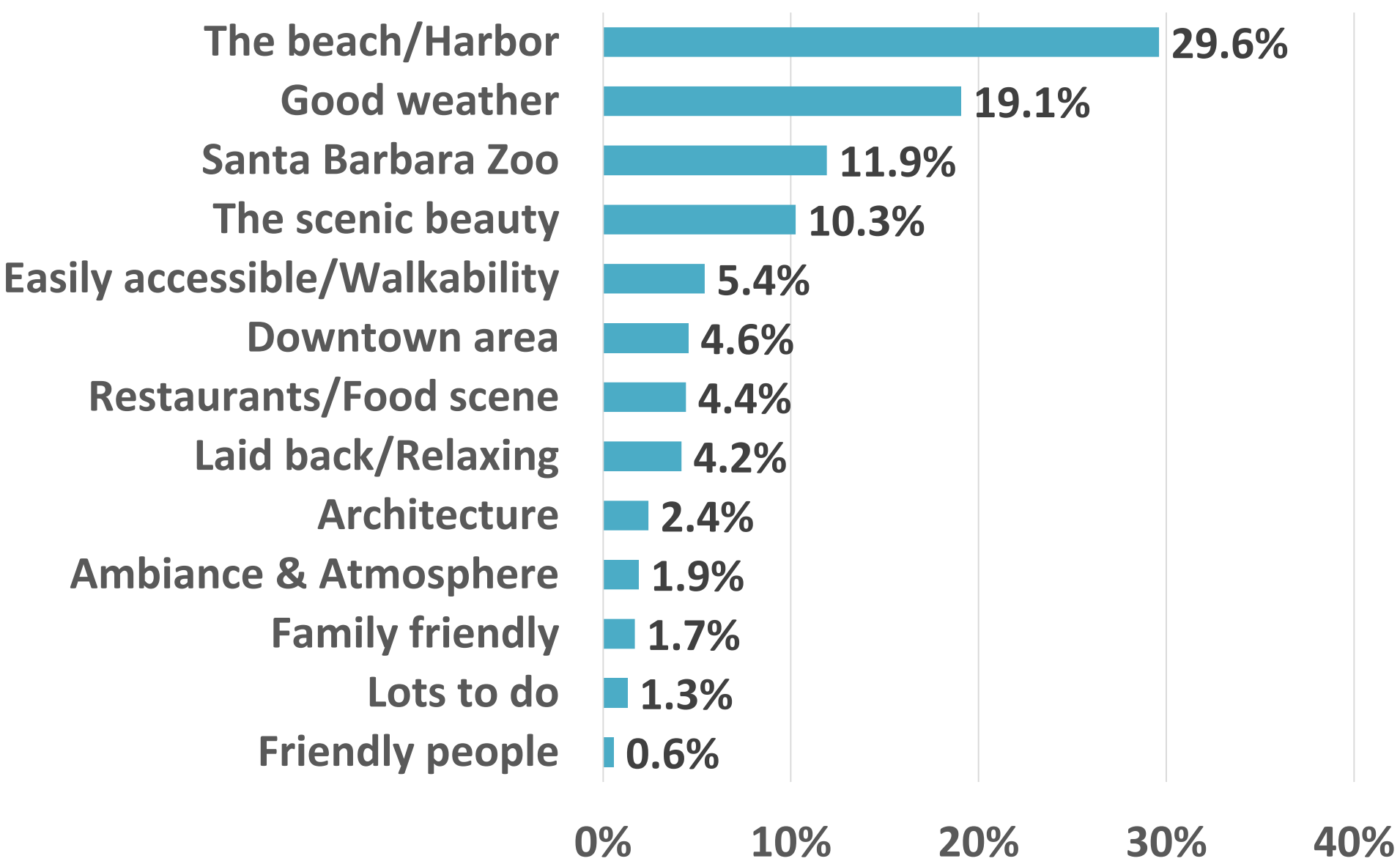
	Hotel Guest	VFR	Day Trip
Leisure or personal reasons	2.2	4.5	5.9
Business reasons	0.4	0.1	0.6
Weddings	0.1	0.2	0.1
Conference or group meeting	0.0	0.0	0.0
Mean # of trips	2.7	4.8	6.6
Sample size:	38	52	94

Question: EXCLUDING THIS VISIT, in the past 12 months, how many visits to Santa Barbara area have you made for each of the following reasons?

# Most Liked Aspects of the Santa Barbara Area (Intercept Survey)

The Santa Barbara South Coast area’s beaches was the most liked aspects of the destination in the minds of visitors surveyed (29.6%). Survey respondents were asked, in an open-ended format, what they liked best about their experience in the Santa Barbara area. The chart and table below list the top cited responses. In addition to the areas beaches, 19.1 percent said the “good weather” was the best part of their experience in the Santa Barbara area. Area visitors also liked the Santa Barbara zoo (11.9%) and the scenic beauty (10.3%).

Figure 22: Most Liked Aspects of the Santa Barbara Area (Unaided)



Base: All respondents. 326 responses.

Detail by Type of Visitor

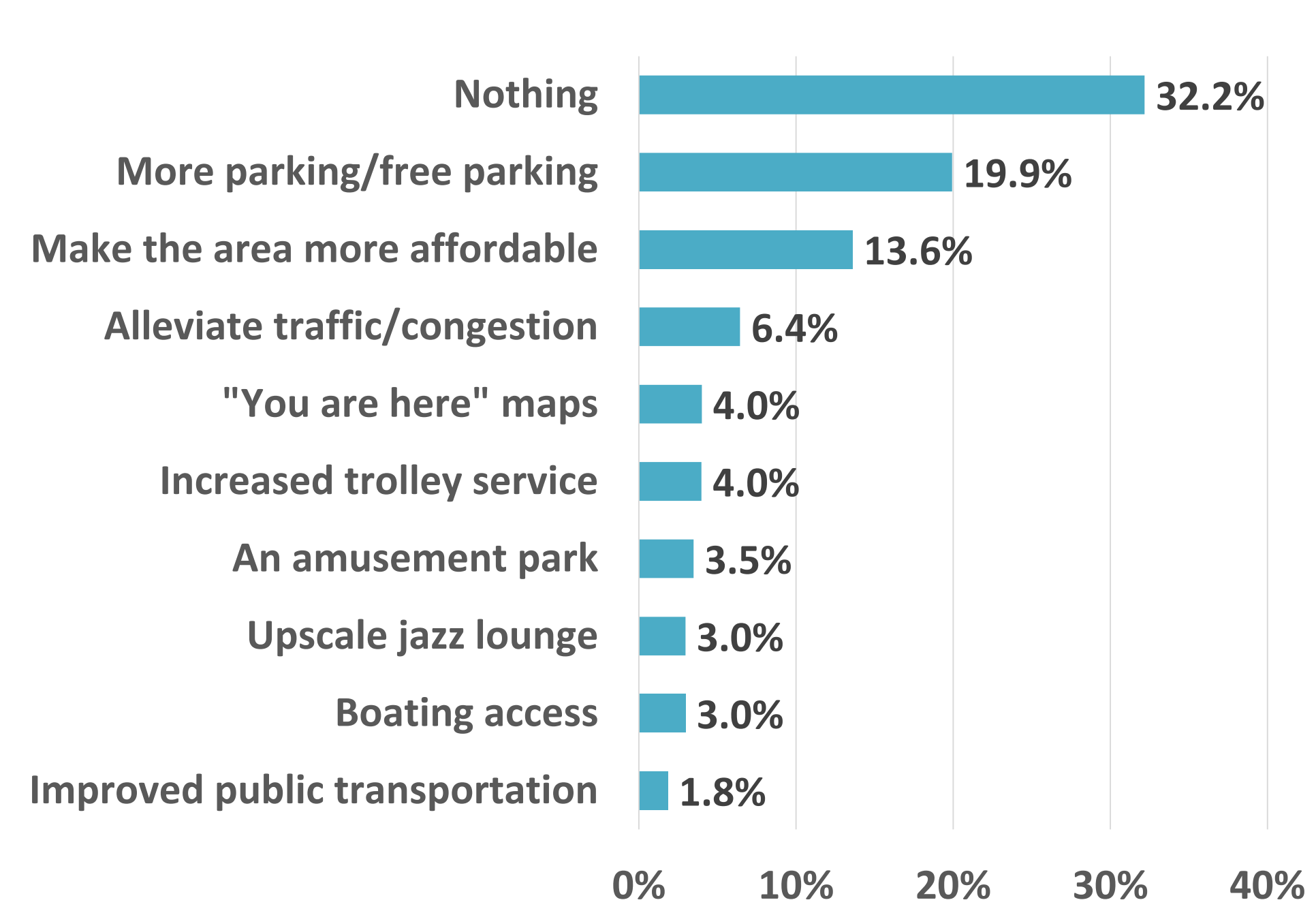
	Hotel Guest	VFR	Day Trip
The beach/Harbor	23.9%	32.3%	30.4%
Good weather	15.5%	16.1%	18.8%
Santa Barbara Zoo	2.8%	6.5%	14.5%
The scenic beauty	7.0%	6.5%	11.6%
Easily accessible/Walkability	7.0%	0.0%	5.8%
Downtown area	4.2%	6.5%	4.3%
Restaurants/Food scene	4.2%	0.0%	4.3%
Laid back/Relaxing	2.8%	3.2%	4.3%
Architecture	1.4%	0.0%	2.9%
Ambiance & Atmosphere	11.3%	6.5%	0.0%
Family friendly	2.8%	3.2%	1.4%
Lots to do	1.4%	0.0%	1.4%
Friendly people	1.4%	6.5%	0.0%
Sample size:	71	62	138

Question: What aspects of your experience in the Santa Barbara area did you like best?

# Attractions/Services that Would Enhance the Santa Barbara Experience (Intercept Survey)

When asked what attractions or services would have most enhanced visitors’ experience in the Santa Barbara area, nearly one-in-three respondents said there was “nothing” the destination needed (32.2%). Of the specific responses provided, more parking/free parking (19.9%) and making the area more affordable (13.6%) were cited as the most desired services that would have enhanced the Santa Barbara area experience.

Figure 23: Attractions/Services that Would Enhance the Santa Barbara Experience (Unaided)



Base: All respondents. 123 responses.

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Nothing	33.3%	8.3%	36.0%
More parking/free parking	10.0%	0.0%	24.0%
Make the area more affordable	20.0%	16.7%	12.0%
Alleviate traffic/congestion	0.0%	8.3%	8.0%
"You are here" maps	0.0%	16.7%	4.0%
Increased trolley service	3.3%	8.3%	4.0%
An amusement park	0.0%	8.3%	4.0%
Upscale jazz lounge	0.0%	0.0%	4.0%
Boating access	0.0%	0.0%	4.0%
Improved public transportation	3.3%	0.0%	0.0%
Sample size:	30	24	50

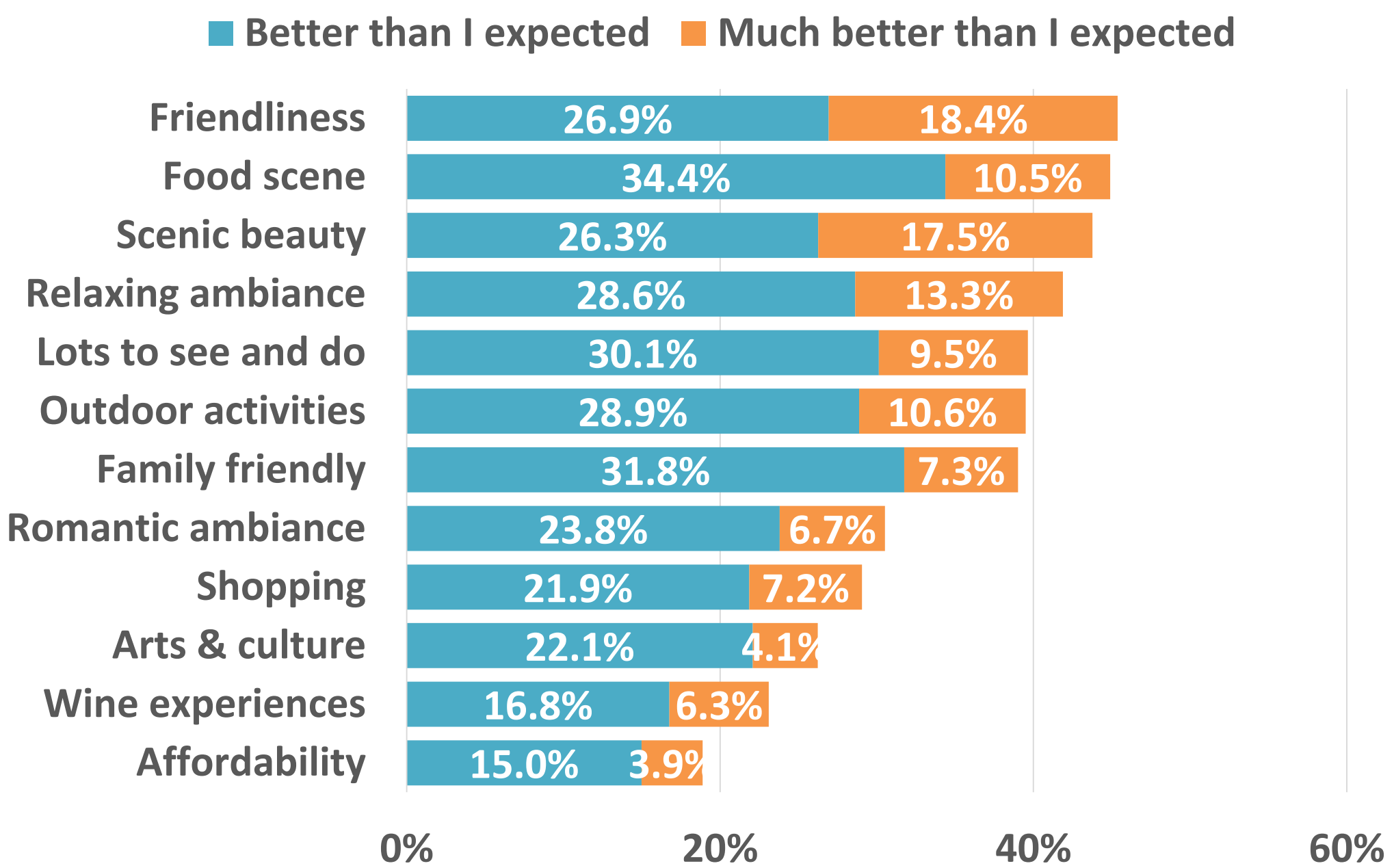
Question: In your opinion, what attractions or services would have most enhanced your experience in the Santa Barbara South Coast?



# How Expectations of Visitor Experience Aspects were Met (Intercept Survey)

**Santa Barbara’s overall friendliness, food scene and scenic beauty were the top destination attributes that exceeded visitors’ expectations.** Survey respondents were asked to think about their experience in Santa Barbara and compare their actual experience in the destination to their expectations before arrival. The chart and table below show the top two box score (“Better than I expected” and “Much better than expected”) for each attribute tested. Nearly half said Santa Barbara’s friendliness (45.4%), food scene (44.9%) and scenic beauty (43.8%) were better or much better than they had initially expected. *(The full data on all aspects tested is presented on the next page.)*

Figure 24: How Expectations of Visitor Experience Aspects were Met



Base: All respondents. 382 responses (weighted).

Detail by Type of Visitor

Top 2 box score (Better than expected & Much better than expected)	Detail by Type of Visitor		
	Hotel Guest	VFR	Day Trip
Friendliness	44.7%	66.7%	43.1%
Food scene	44.0%	72.7%	43.1%
Scenic beauty	48.9%	75.8%	38.9%
Relaxing ambiance	42.6%	75.8%	38.9%
Lots to see and do	41.1%	54.5%	37.5%
Outdoor activities	38.3%	63.6%	37.5%
Family friendly	31.2%	78.8%	38.9%
Romantic ambiance	27.7%	69.7%	27.8%
Shopping	24.8%	45.5%	29.2%
Arts & culture	27.0%	54.5%	23.6%
Wine experiences	20.6%	45.5%	22.2%
Affordability	17.0%	18.2%	19.4%
Sample size:	141	66	144

Question: Thinking about your experience on this trip, how did Santa Barbara South Coast compare to what you expected before arriving?



# How Expectations of Visitor Experience Aspects were Met – Full Detail

## Detail by Level of Expectations

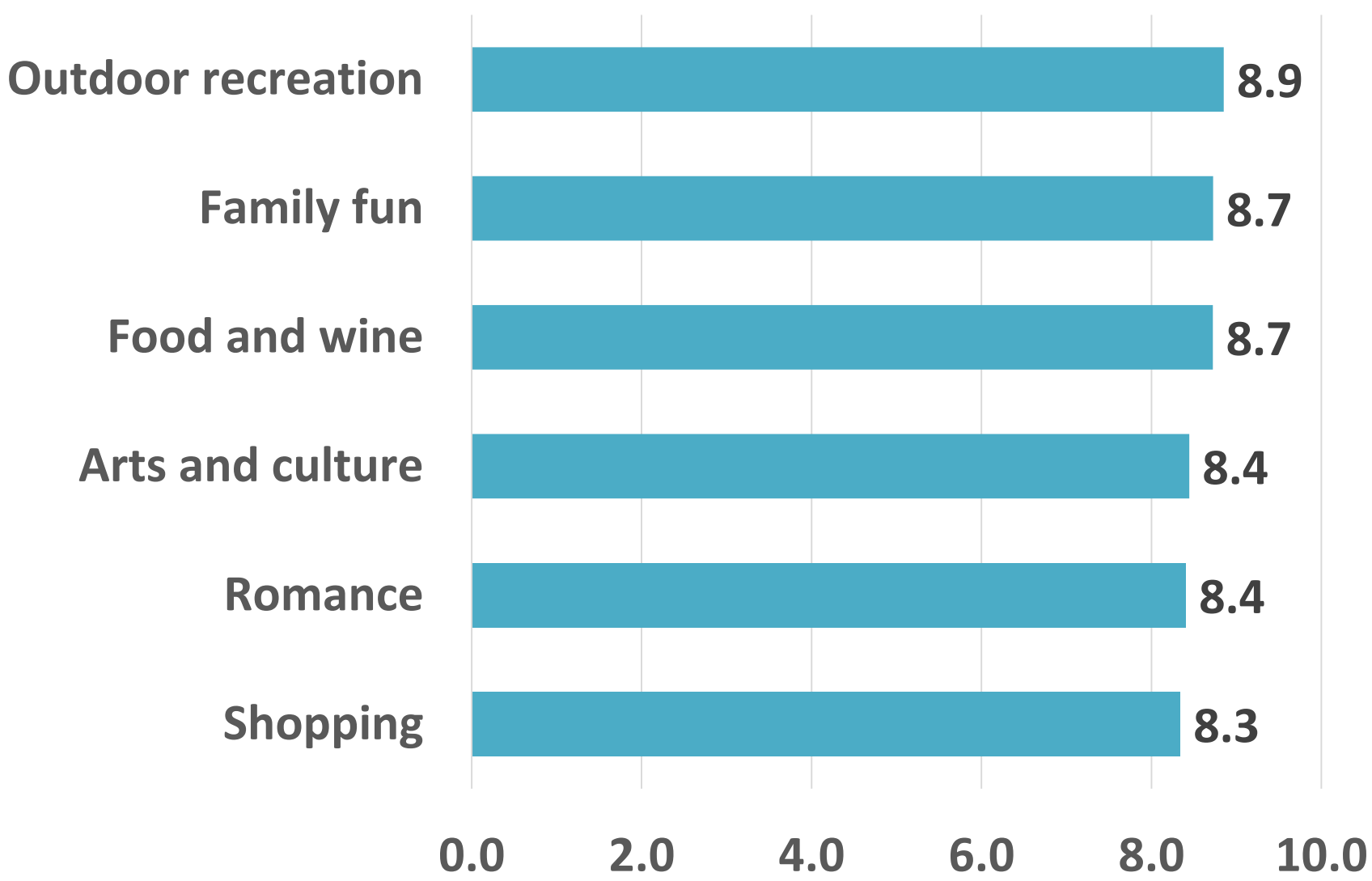
Total aggregate	Much better than I expected	Better than I expected	Exactly what I expected	Worse than I expected	Much worse than I expected
Friendliness	20.1%	29.3%	48.0%	0.4%	0.0%
Food scene	12.8%	35.2%	46.9%	2.9%	0.0%
Scenic beauty	22.3%	28.6%	46.5%	0.4%	0.0%
Relaxing ambiance	18.3%	28.2%	49.1%	0.4%	0.0%
Lots to see and do	13.2%	29.7%	49.8%	2.6%	0.4%
Outdoor activities	13.9%	28.6%	47.3%	1.5%	0.0%
Family friendly	9.5%	30.8%	51.3%	0.4%	0.0%
Romantic ambiance	12.1%	22.7%	53.1%	1.8%	0.0%
Shopping	9.2%	21.2%	56.4%	3.7%	1.1%
Arts & culture	6.2%	23.8%	55.3%	2.6%	0.0%
Wine experiences	7.3%	17.2%	54.2%	1.1%	0.4%
Affordability	4.0%	15.4%	65.2%	10.3%	4.0%
Sample size:	382				

Question: Thinking about your experience on this trip, how did Santa Barbara South Coast compare to what you expected before arriving? Base: All respondents. 382 responses (weighted).

# Visitor Experience Ratings (Intercept Survey)

Of the visitor experiences tested, the Santa Barbara area shows the greatest strength as a destination for outdoor recreation (8.9), family fun (8.7) and food & wine (8.7). Using a ten-point scale from 1 to 10 in which “1” represents “Very poor” and “10” represents “Excellent,” survey respondents were asked to rate the Santa Barbara area as a destination for six travel experiences. The destination received a mean score above 8 for every experience tested. Both hotel guest and VFR visitors scored Santa Barbara higher in romance, with an average rating of 8.6 and 8.7, respectively.

Figure 25: Visitor Experience Ratings



Base: All respondents. 340 responses (weighted).

Detail by Type of Visitor

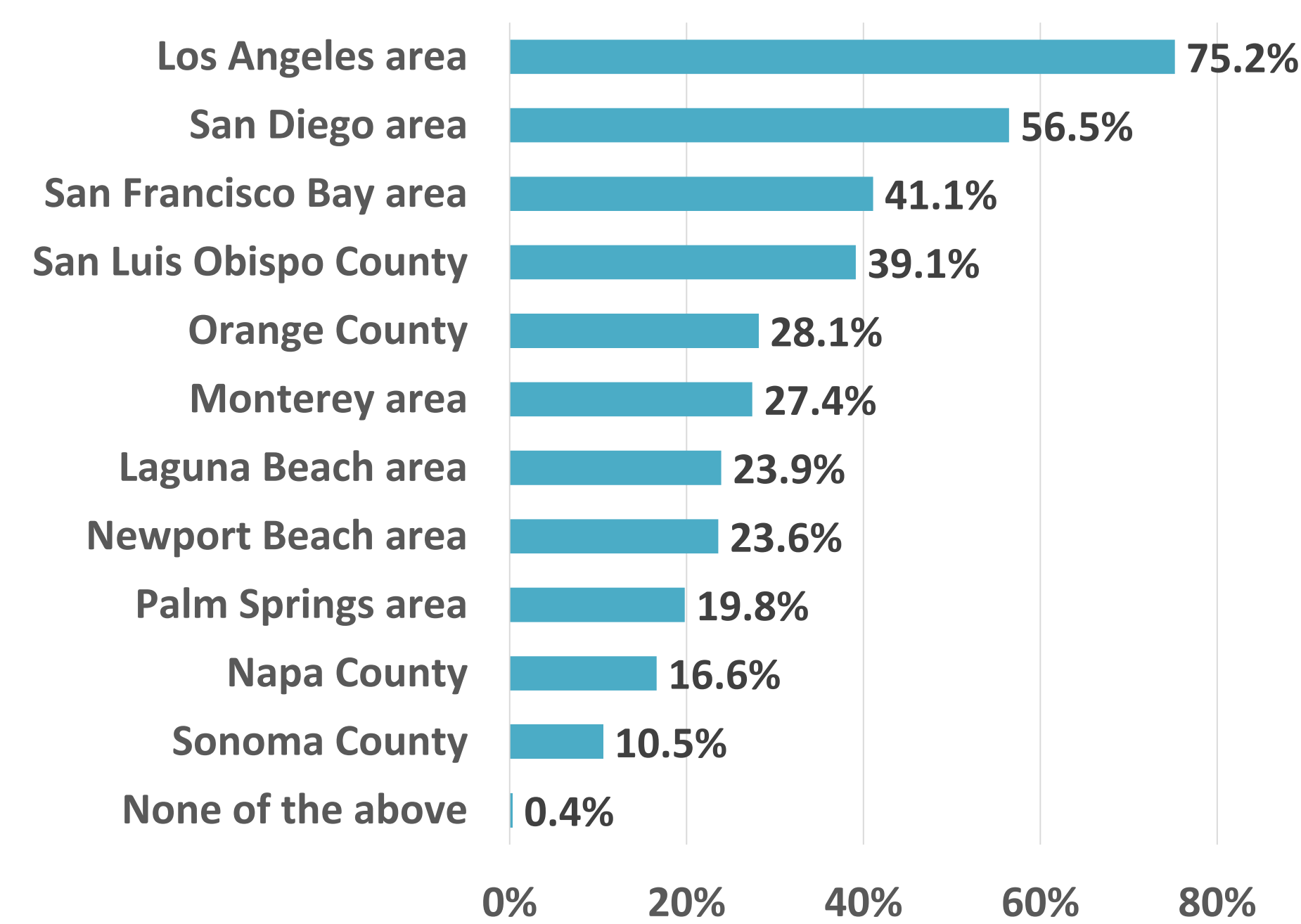
	Hotel Guest	VFR	Day Trip
Outdoor recreation	8.8	9.0	8.9
Family fun	8.4	8.7	8.8
Food and wine	8.8	8.6	8.8
Arts and culture	8.4	8.4	8.4
Romance	8.6	8.7	8.3
Shopping	7.8	8.4	8.4
Sample size:	73	64	144

Question: 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:

# California Destinations Visited in the Past 2 Years (Intercept Survey)

The southern California areas of Los Angeles (75.2%) and San Diego (56.5%) were other California destinations Santa Barbara area visited traveled to in the past two years. From a list of California destinations, survey respondents were asked where they had visited for leisure in the past two years. In addition to Los Angeles and San Diego, San Francisco Bay area (41.1%) and San Luis Obispo County (39.1%) also had significant levels of past visitation. Day trip visitors were more likely to have visited Los Angeles and San Diego (78.4% and 58.1%, respectively) compared to hotel guest visitors (50.6% and 43.0%, respectively).

Figure 26: California Destinations Visited in the Past 2 Years



Base: All respondents. 352 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Los Angeles area	50.6%	84.8%	78.4%
San Diego area	43.0%	60.6%	58.1%
San Francisco Bay area	41.8%	60.6%	39.2%
San Luis Obispo County	22.8%	33.3%	41.9%
Orange County	24.1%	27.3%	28.4%
Monterey area	20.3%	36.4%	28.4%
Laguna Beach area	16.5%	30.3%	24.3%
Newport Beach	22.8%	27.3%	23.0%
Palm Springs area	15.2%	24.2%	20.3%
Napa County	21.5%	12.1%	16.2%
Sonoma County	17.7%	6.1%	9.5%
None of the above	2.5%	0.0%	0.0%
Sample size:	79	66	148

Question: Which of the following destinations have you visited for leisure in the past two (2) years? (Select all that apply)



# SAMPLE DEMOGRAPHICS

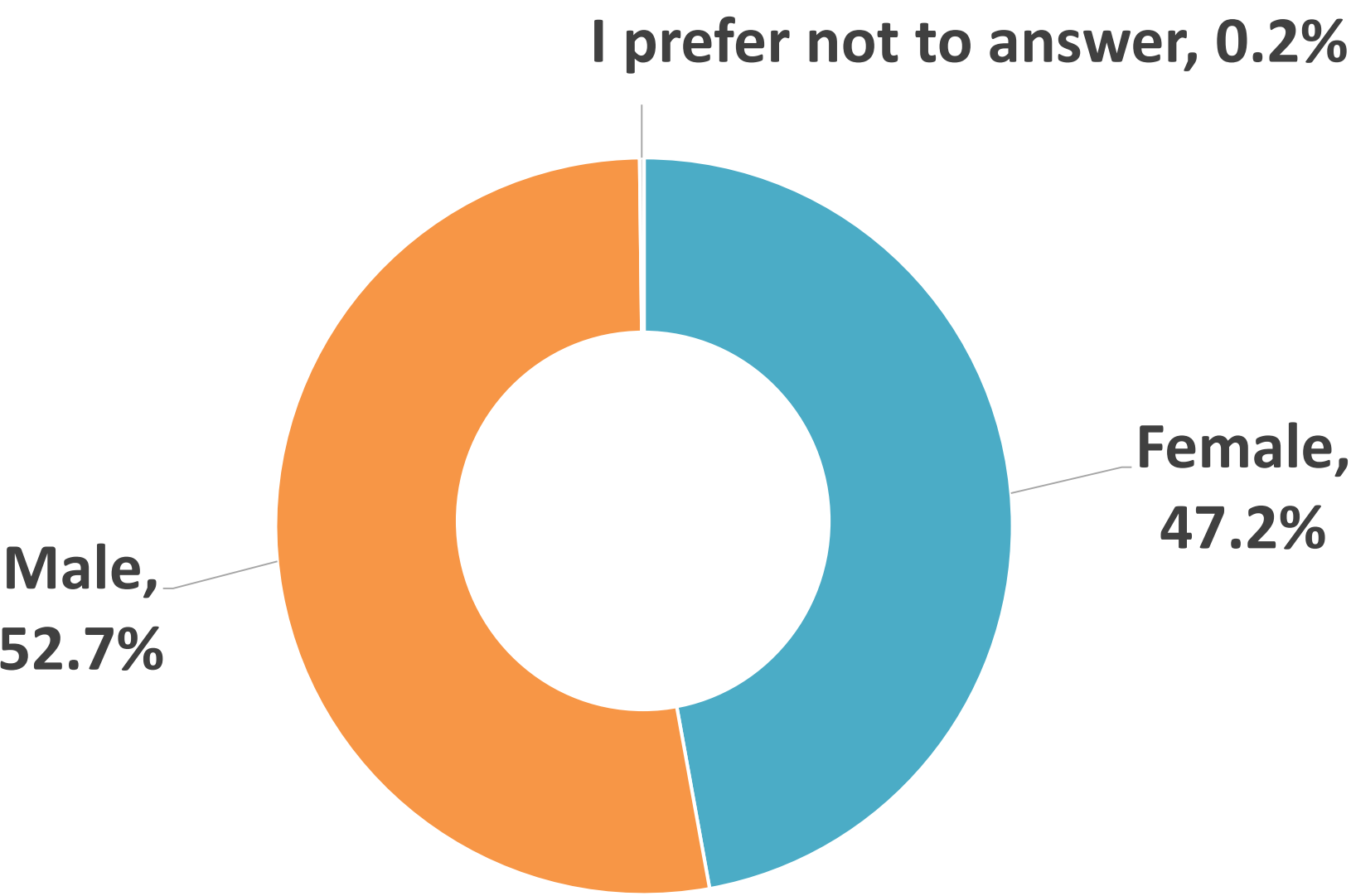
## Q1 (SEPTEMBER-NOVEMBER 2016)



# Gender

Through September and November of 2016, there was nearly an even gender split amongst survey respondents. 52.7 percent of the sample were male and 47.2 percent were female.

Figure 27: Gender



Base: All respondents. 322 responses (weighted).

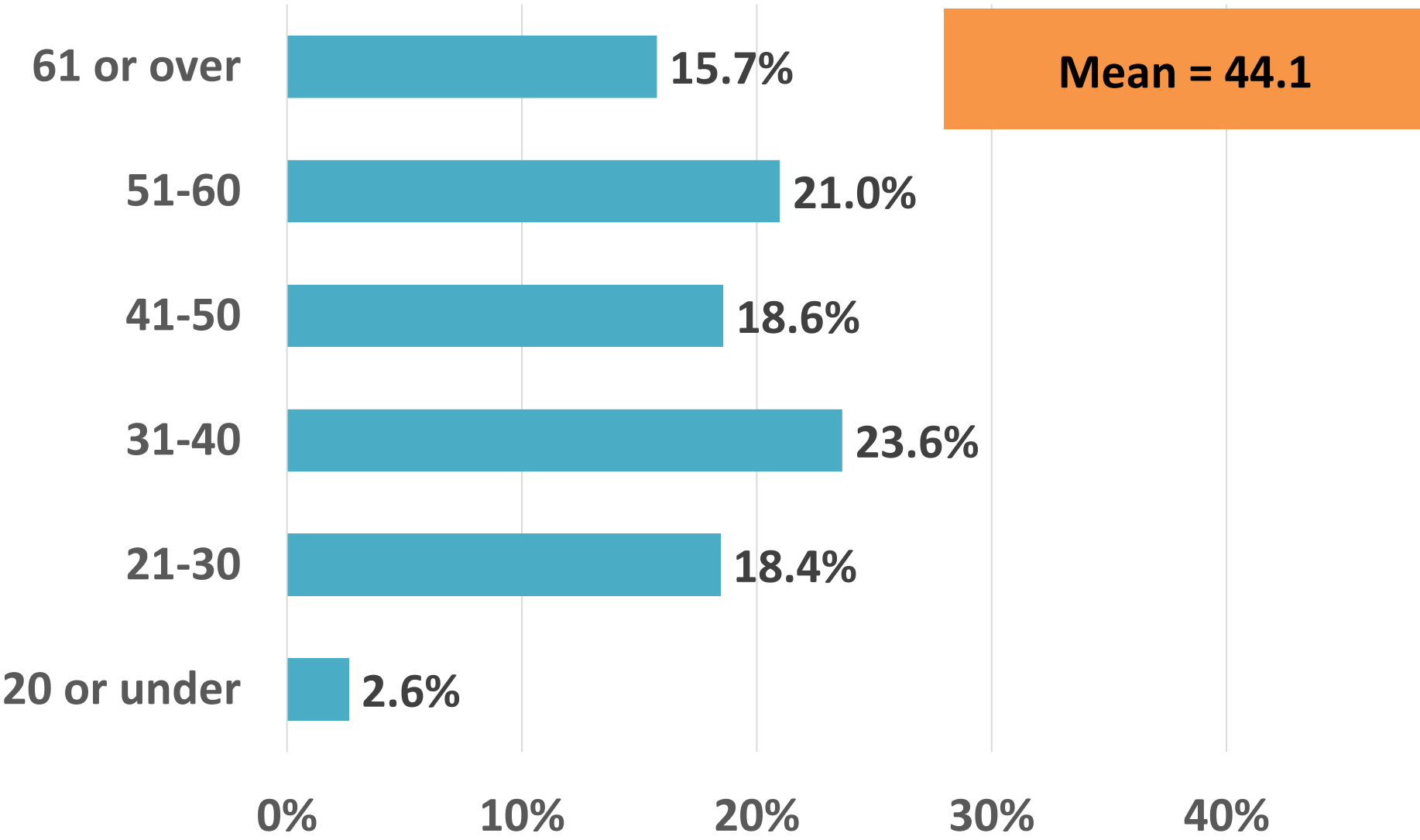
Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Female	58.1%	41.4%	43.9%
Male	41.2%	58.6%	56.1%
I prefer not to answer	0.7%	0.0%	0.0%
Sample size:	136	58	114

Question: What is your gender?

The average age of the Santa Barbara area visitors surveyed between September and November of 2016 was 44.1 years. Santa Barbara area hotel visitors (52.8) are typically older than both VFR (36.7) and day-trip visitors (41.6).

Figure 28: Age



Base: All respondents. 281 responses (weighted).

Detail by Type of Visitor

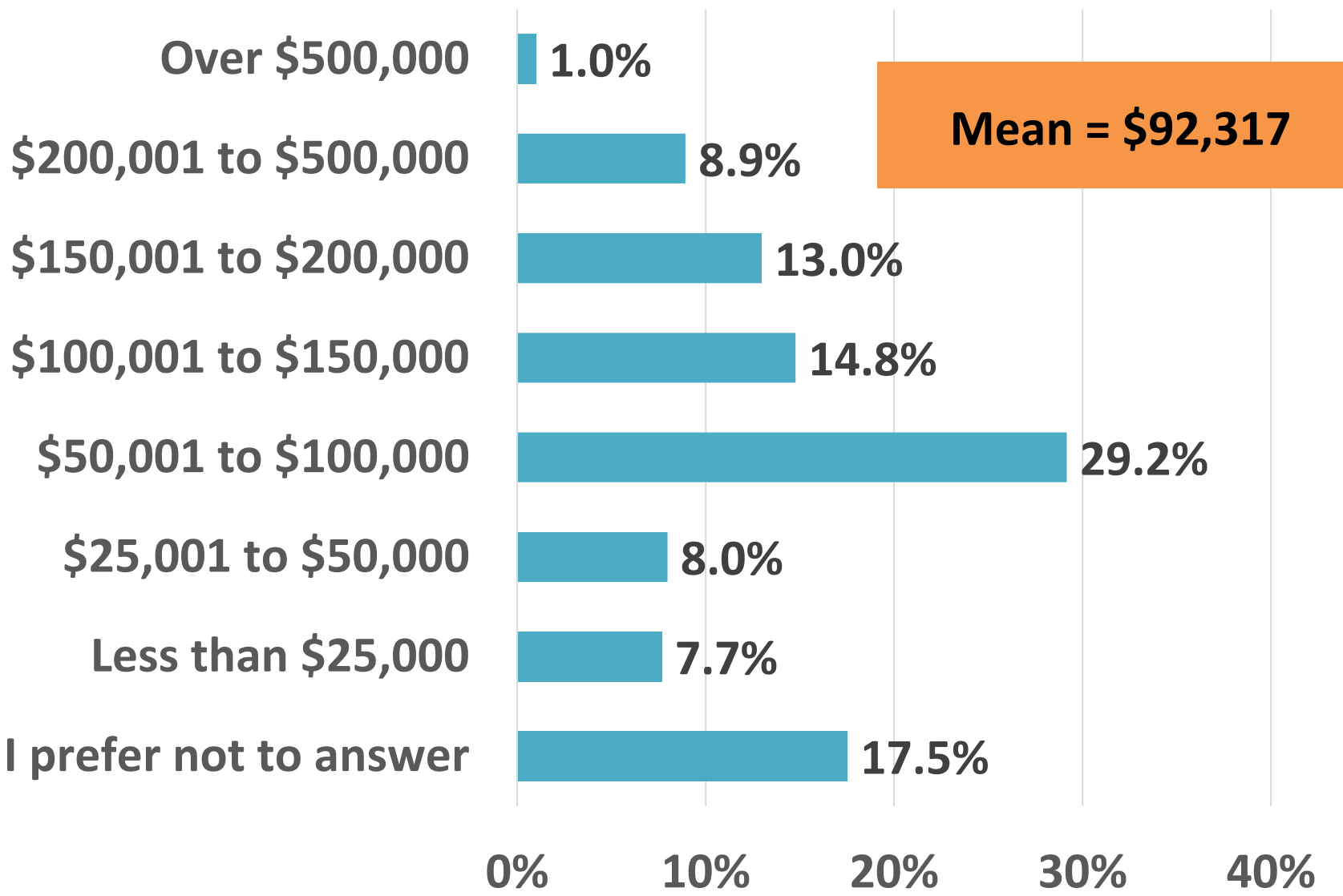
	Hotel Guest	VFR	Day Trip
61 or over	39.3%	11.1%	6.1%
51-60	26.2%	11.1%	20.4%
41-50	5.7%	14.8%	24.5%
31-40	12.3%	14.8%	30.6%
21-30	16.4%	40.7%	16.3%
20 or under	0.0%	7.4%	2.0%
Mean	52.8	36.7	41.6
Sample size:	122	54	98

Question: Which is your age?

# Annual Household Income

Santa Barbara area visitors surveyed through the first quarter have an average annual household income of \$92,317. Hotel guests report a slightly higher household income compared to day-trip visitors (\$98,193 vs. \$92,330).

Figure 29: Annual Household Income



Base: All respondents. 317 responses (weighted).

Detail by Type of Visitor

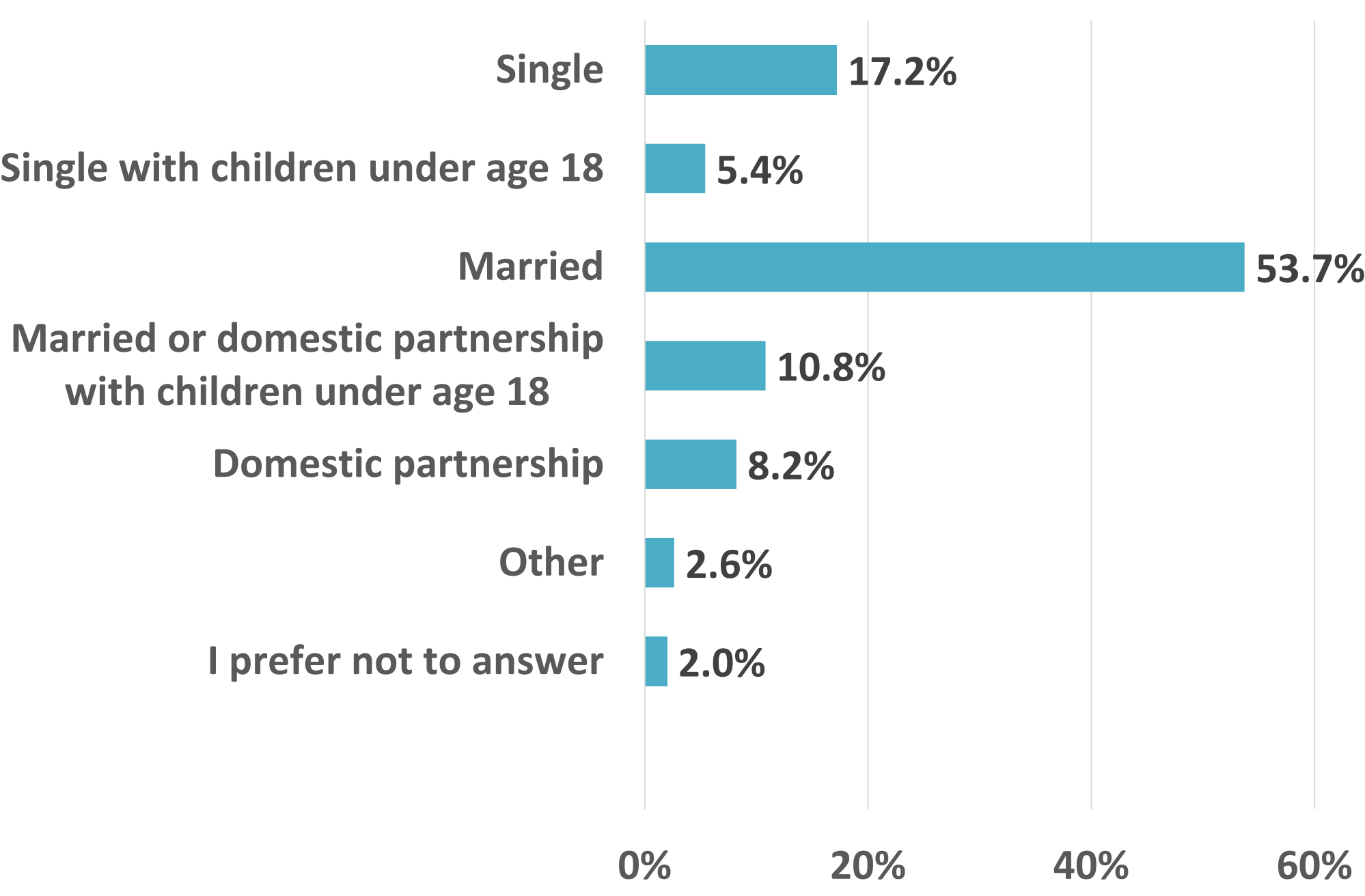
	Hotel Guest	VFR	Day Trip
Over \$500,000	2.2%	6.9%	0.0%
\$200,001 to \$500,000	16.4%	6.9%	5.4%
\$150,001 to \$200,000	12.7%	3.4%	14.3%
\$100,001 to \$150,000	15.7%	20.7%	14.3%
\$50,001 to \$100,000	21.6%	24.1%	33.9%
\$25,001 to \$50,000	5.2%	10.3%	8.9%
Less than \$25,000	6.7%	13.8%	7.1%
I prefer not to answer	19.4%	13.8%	16.1%
Mean	\$98,193	\$76,786	\$92,330
Sample size:	134	58	112

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

# Marital Status

Nearly three-quarters of Santa Barbara area visitors surveyed are married or partnered (72.8%), while 22.6 percent are single. In total, 16.2 percent of survey respondents have children under the age of 18.

Figure 30: Marital Status



Base: All respondents. 323 responses (weighted).

Detail by Type of Visitor

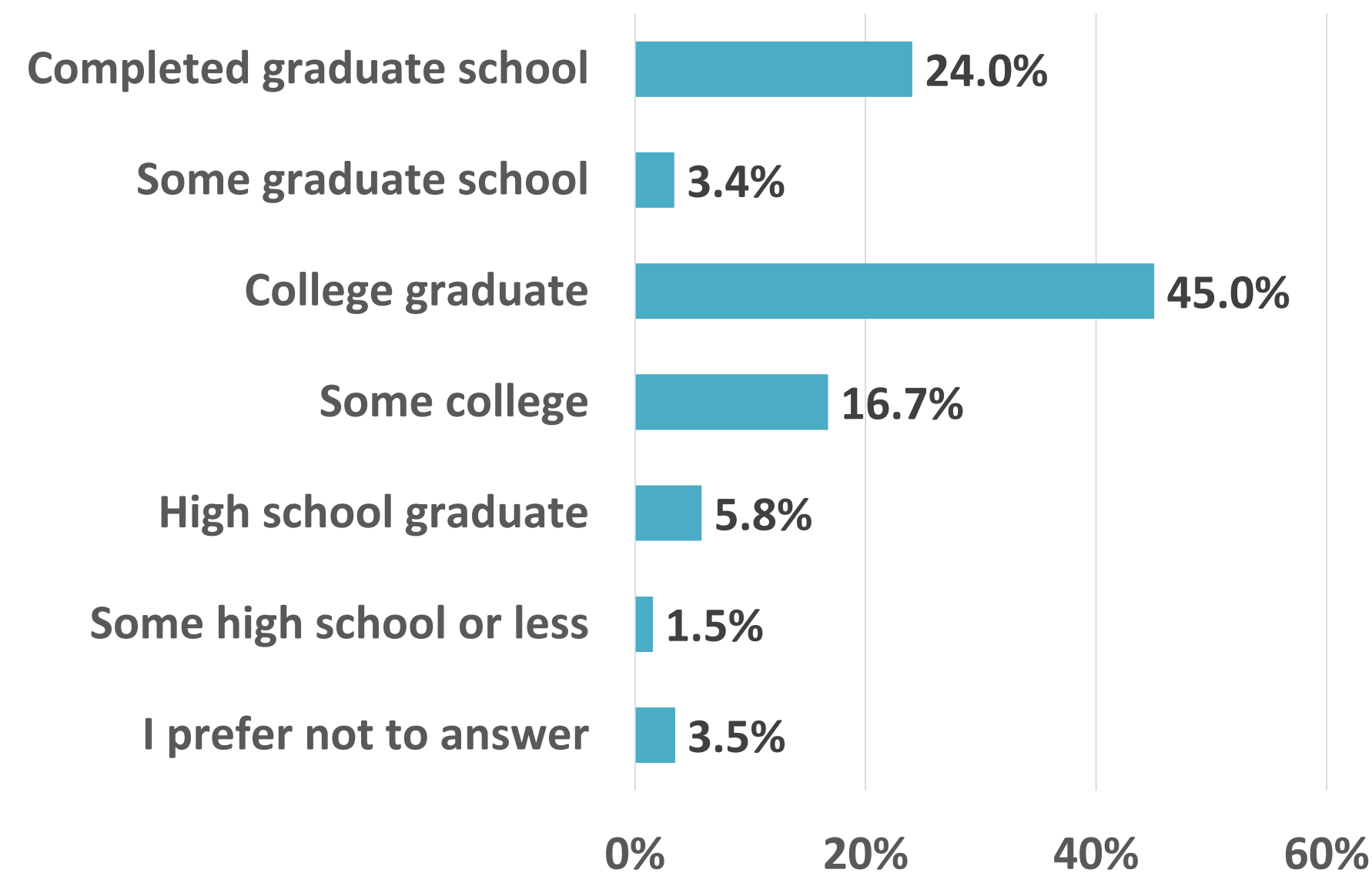
	Hotel Guest	VFR	Day Trip
Single	12.9%	44.8%	15.8%
Single with children under age 18	1.4%	0.0%	7.0%
Married	66.9%	37.9%	50.9%
Domestic partnership	6.5%	10.3%	8.8%
Married or domestic partnership with children under age 18	5.8%	0.0%	14.0%
Other	1.4%	0.0%	3.5%
I prefer not to answer	5.0%	6.9%	0.0%
Sample size:	139	58	114

Question: Which of the following best describes your current marital status?



Santa Barbara area visitors surveyed are highly educated. 72.5 percent have at least a bachelor’s degree, including 24.0 percent who have completed graduate school.

Figure 31: Education



Base: All respondents. 319 responses (weighted).

Detail by Type of Visitor

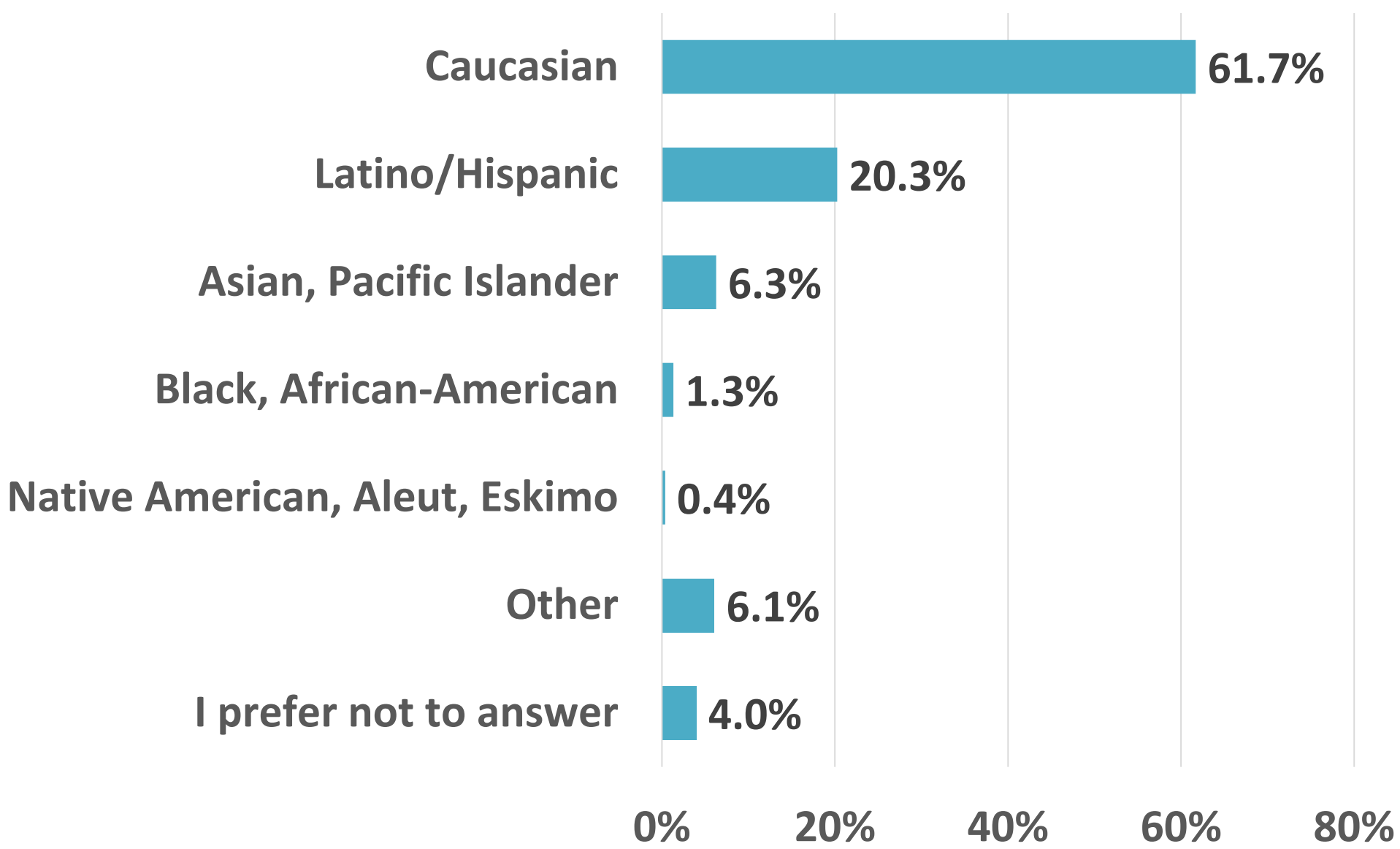
	Hotel Guest	VFR	Day Trip
Completed graduate school	31.9%	17.2%	21.4%
Some graduate school	6.5%	0.0%	1.8%
College graduate	40.6%	34.5%	48.2%
Some college	9.4%	34.5%	17.9%
High school graduate	7.2%	6.9%	5.4%
Some high school or less	0.7%	3.4%	1.8%
I prefer not to answer	3.6%	3.4%	3.6%
Sample size:	138	58	112

Question: What is your highest level of formal education? (Select one)

# Ethnicity

While 61.7 percent of respondents identify as Caucasian, 34.3 percent identify as other ethnicities. The largest non-Caucasian visitor groups were Latino/Hispanic (20.3%) and Asian, Pacific Islander (6.3%).

Figure 32: Ethnicity



Base: All respondents. 322 responses (weighted).

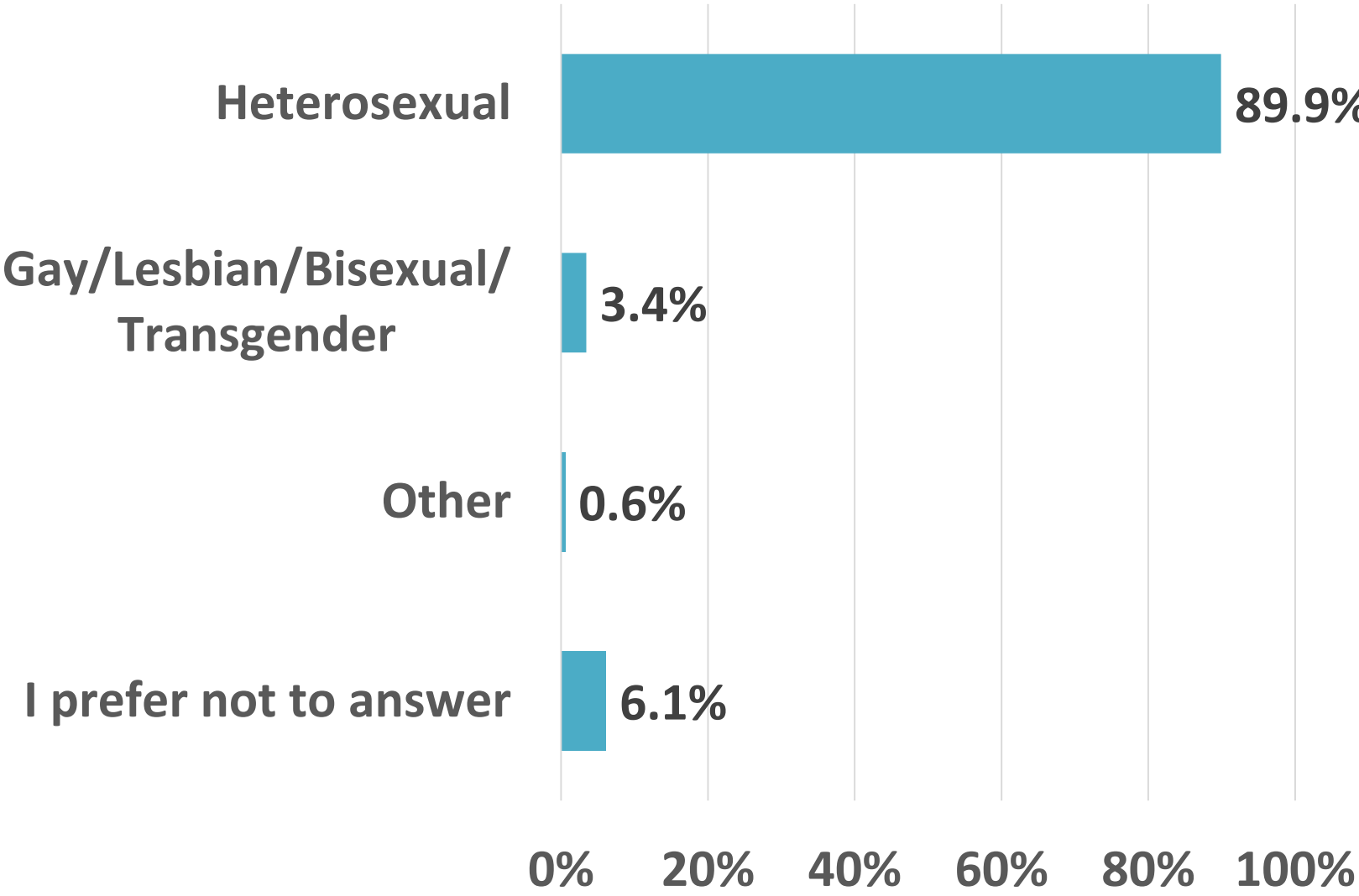
Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Caucasian	79.0%	55.2%	54.4%
Latino/Hispanic	3.6%	27.6%	26.3%
Asian, Pacific Islander	4.3%	10.3%	7.0%
Black, African-American	0.0%	3.4%	1.8%
Native American, Aleut, Eskimo	1.4%	0.0%	0.0%
Other	5.1%	3.4%	7.0%
I prefer not to answer	6.5%	0.0%	3.5%
Sample size:	138	58	114

Question: Which best describes your ethnicity?

In total, 89.9 percent of visitors surveyed between September and November of 2016 were heterosexual and 3.4 percent were LGBT.

Figure 33: LGBT



Base: All respondents. 260 responses (weighted).

Detail by Type of Visitor

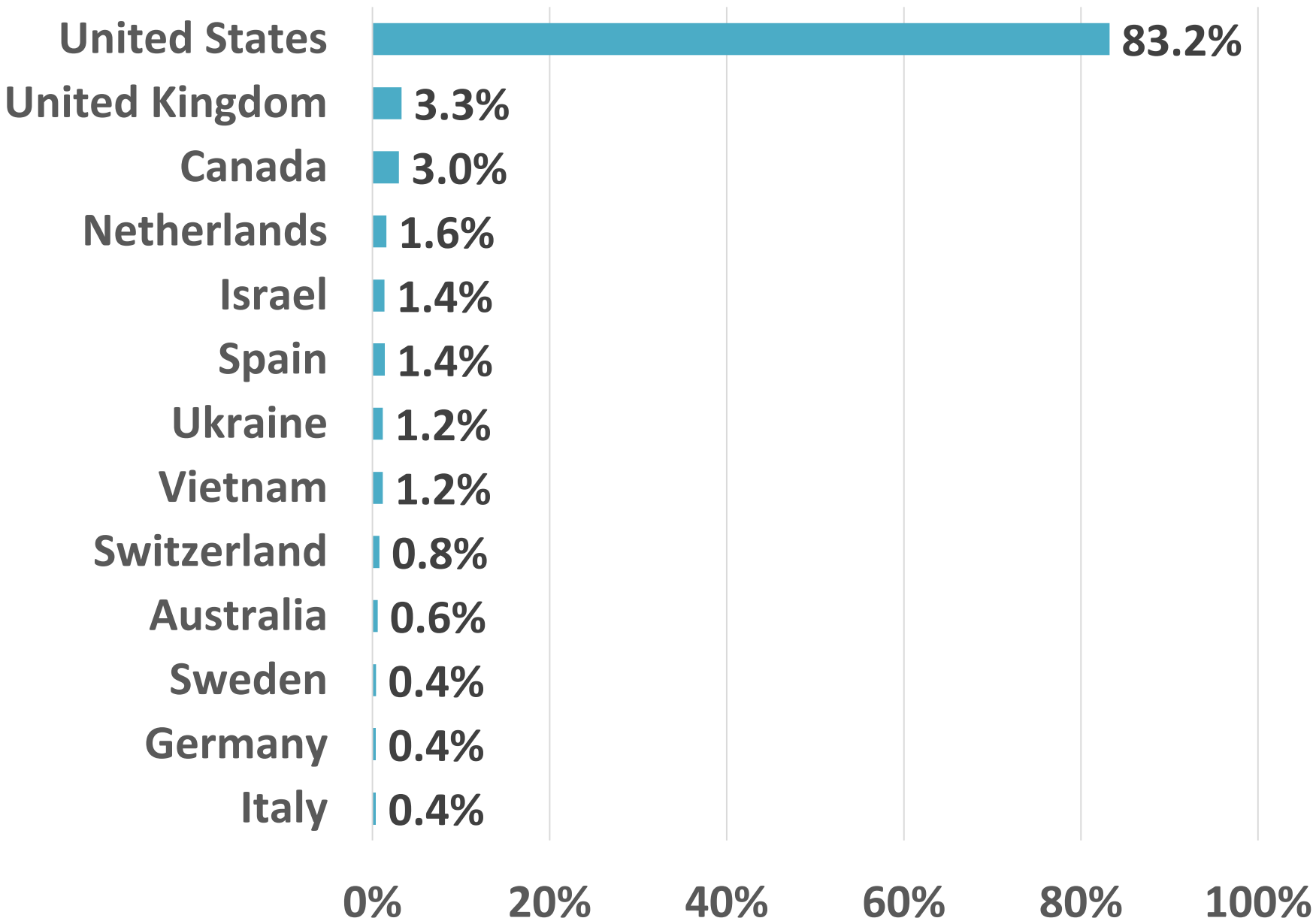
	Hotel Guest	VFR	Day Trip
Heterosexual	82.0%	75.9%	92.7%
Gay/Lesbian/Bisexual/Transgender	4.0%	17.2%	1.8%
Other	2.0%	0.0%	0.0%
I prefer not to answer	12.0%	6.9%	5.5%
Sample size:	50	58	110

Question: Which best describes you? (Select one)

# Point of Origin: Top Countries of Residence

A majority of visitors surveyed reside within the United States (83.2%) while the remaining 18.3 percent were international residents. The top international markets represented within the sample were United Kingdom (3.3%) and Canada (3.0%).

Figure 34: Point of Origin - Top Countries of Residence



Base: All respondents. 313 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
United States	79.6%	88.9%	85.5%
United Kingdom	5.8%	0.0%	1.8%
Canada	0.7%	3.7%	3.6%
Netherlands	1.5%	0.0%	1.8%
Israel	0.7%	0.0%	1.8%
Spain	0.7%	0.0%	1.8%
Ukraine	0.0%	0.0%	1.8%
Vietnam	0.0%	0.0%	1.8%
Switzerland	2.9%	0.0%	0.0%
Australia	2.2%	0.0%	0.0%
Sweden	0.7%	3.7%	0.0%
Germany	1.5%	0.0%	0.0%
Italy	1.5%	0.0%	0.0%
Sample size:	137	54	110

Question: In what country do you reside?



# Point of Origin: Countries of Residence – Full Data

	Q1 Total	Hotel Guest	VFR	Day Trip
United States	83.2%	79.6%	88.9%	85.5%
United Kingdom	3.3%	5.8%	0.0%	1.8%
Canada	3.0%	0.7%	3.7%	3.6%
Netherlands	1.6%	1.5%	0.0%	1.8%
Israel	1.4%	0.7%	0.0%	1.8%
Spain	1.4%	0.7%	0.0%	1.8%
Ukraine	1.2%	0.0%	0.0%	1.8%
Vietnam	1.2%	0.0%	0.0%	1.8%
Switzerland	0.8%	2.9%	0.0%	0.0%
Australia	0.6%	2.2%	0.0%	0.0%
Sweden	0.4%	0.7%	3.7%	0.0%
Germany	0.4%	1.5%	0.0%	0.0%
Italy	0.4%	1.5%	0.0%	0.0%
Brazil	0.3%	0.0%	0.0%	0.0%
Chile	0.3%	0.0%	0.0%	0.0%
India	0.2%	0.0%	3.7%	0.0%
China	0.2%	0.7%	0.0%	0.0%
France	0.2%	0.7%	0.0%	0.0%
New Zealand	0.2%	0.7%	0.0%	0.0%
Sample size:	313	137	54	110

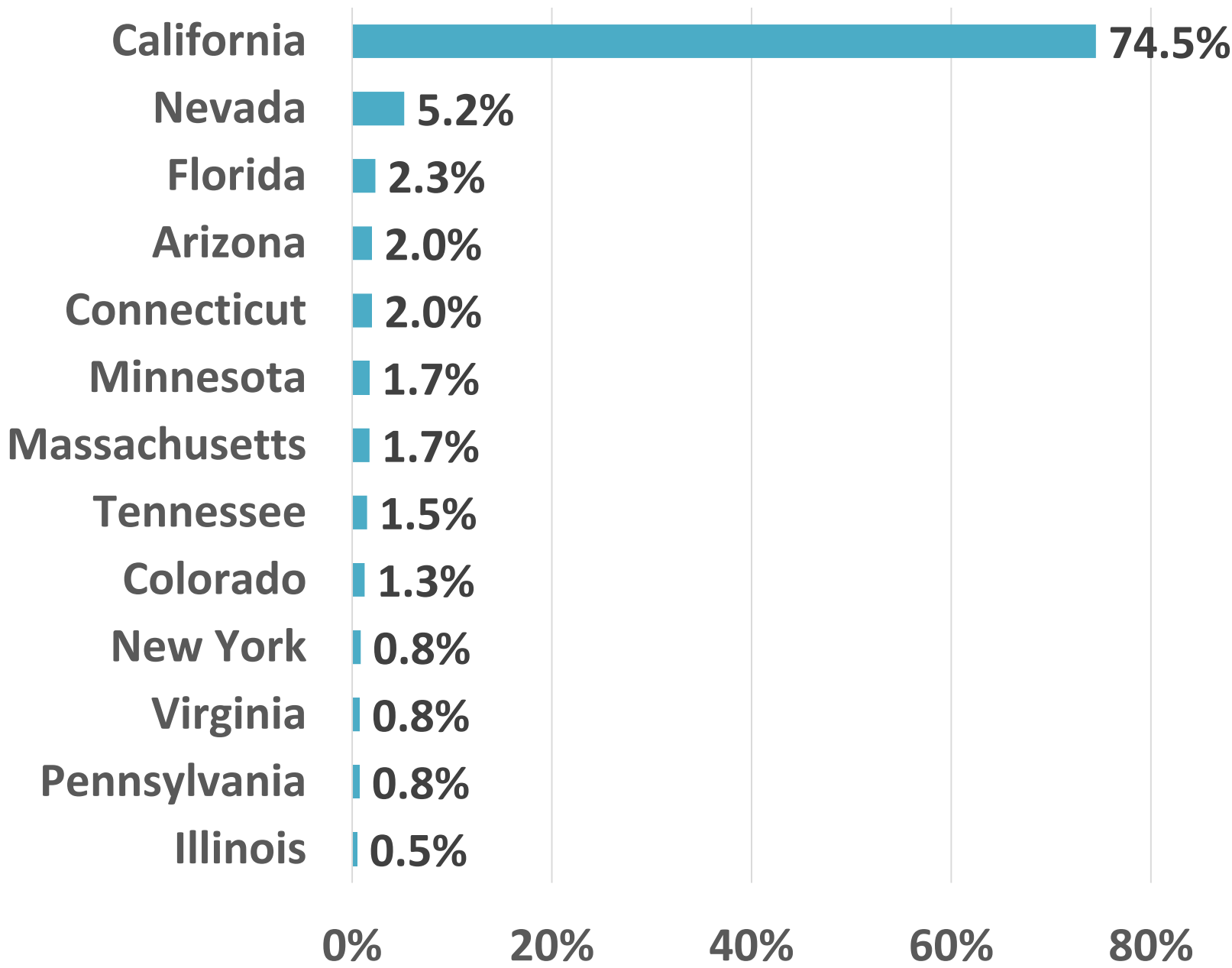
Question: In what country do you reside?

Base: All respondents. 313 responses (weighted).

# Point of Origin: Top States of Residence

Three-quarters of Santa Barbara area visitors surveyed through the first quarter were California residents (74.5%). In total, 25.5 percent of survey respondents were out-of-state residents with top visitation from Nevada (5.2%), Florida (2.3%), Arizona (2.0%) and Connecticut (2.0%).

Figure 35: Point of Origin - Top States of Residence



Base: All respondents. 246 responses (weighted).

Detail by Type of Visitor

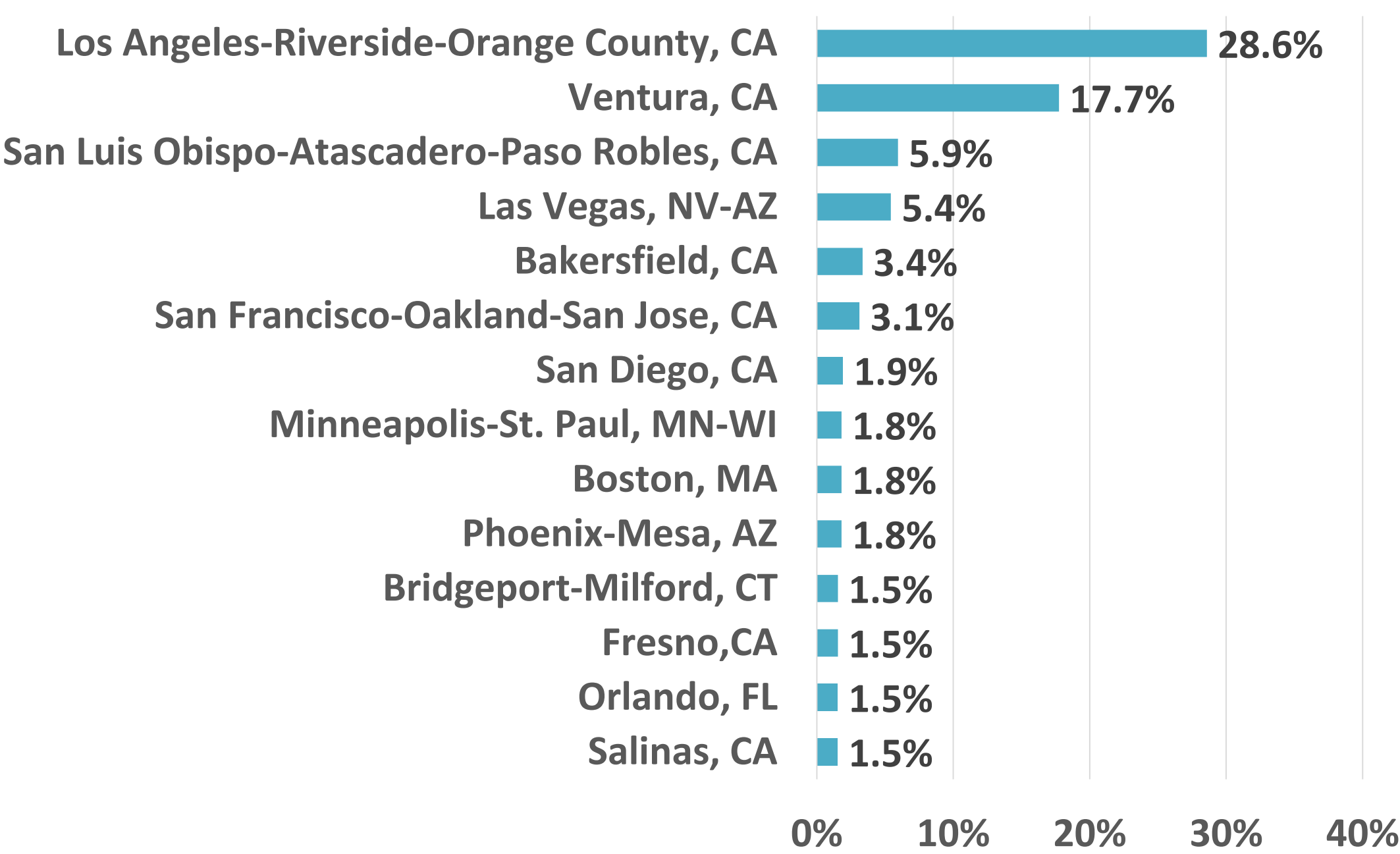
	Hotel Guest	VFR	Day Trip
California	66.0%	52.4%	80.0%
Nevada	1.0%	9.5%	6.7%
Florida	2.0%	0.0%	2.2%
Arizona	2.0%	0.0%	2.2%
Connecticut	2.0%	0.0%	2.2%
Minnesota	0.0%	4.8%	2.2%
Massachusetts	1.0%	0.0%	2.2%
Tennessee	0.0%	0.0%	2.2%
Colorado	5.0%	0.0%	0.0%
New York	1.0%	4.8%	0.0%
Virginia	2.0%	4.8%	0.0%
Pennsylvania	3.0%	0.0%	0.0%
Illinois	1.0%	4.8%	0.0%
Sample size:	100	42	90

Question: What is your zip/postal code?

# Point of Origin: Top MSAs of Residence

The highest proportions of domestic Santa Barbara area visitors surveyed between September and November of 2016 reside in the Los Angeles-Riverside-Orange County, CA MSA (28.6%) or the Ventura, CA MSA (17.7%). These was followed by San Luis Obispo-Atascadero-Paso Robles, CA at 5.9 percent. Top out-of-state markets included Las Vegas, NV-AZ MSA (5.4%), Minneapolis-St. Paul, MN-WI MSA (1.8%), Boston, MA MSA (1.8%) and Phoenix-Mesa, AZ MSA (1.8%). Comparing this to findings in the 2012 Visitor Profile we see that Los Angeles-Riverside-Orange County, CA continues to be the top feeder market and interestingly the Ventura and Las Vegas markets are emerging as significant contributors to visitation in 2016 (these markets were not top MSAs in 2012).

Figure 36: Point of Origin - Top MSAs of Residence



Base: All respondents. 236 responses (weighted).

Detail by Type of Visitor

	Hotel Guest	VFR	Day Trip
Los Angeles-Riverside-Orange County, CA	42.6%	30.0%	22.7%
Ventura, CA	3.2%	0.0%	25.0%
San Luis Obispo-Atascadero-Paso Robles, CA	4.3%	5.0%	6.8%
Las Vegas, NV-AZ	1.1%	10.0%	6.8%
Bakersfield, CA	0.0%	5.0%	4.5%
San Francisco-Oakland-San Jose, CA	5.3%	5.0%	2.3%
San Diego, CA	6.4%	0.0%	0.0%
Minneapolis-St. Paul, MN-WI	0.0%	5.0%	2.3%
Boston, MA	1.1%	0.0%	2.3%
Phoenix-Mesa, AZ	1.1%	0.0%	2.3%
Bridgeport-Milford, CT	0.0%	0.0%	2.3%
Fresno, CA	0.0%	0.0%	2.3%
Orlando, FL	0.0%	0.0%	2.3%
Salinas, CA	0.0%	0.0%	2.3%
Sample size:	94	20	44

Question: What is your zip/postal code?