



**2016/17**

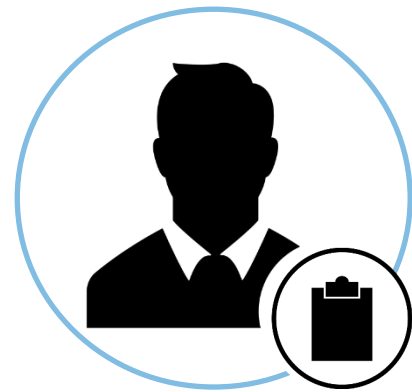
**Santa Barbara South Coast  
Visitor Profile & Tourism  
Economic Impact Study**

*Research prepared for Visit Santa Barbara by  
Destination Analysts, Inc.*



# Methodology

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## Visitor Intercept Survey



## Hotel Guest Survey



## Survey of Santa Barbara South Coast Homes



## Survey of Santa Barbara South Coast Meeting Planners



## Survey of Santa Barbara South Coast Hoteliers

**When you think of Santa Barbara, what are  
the first words that come to mind?**

Beth



The background image shows a historic building with a red-tiled roof and a small dome. Palm trees are visible in the foreground and background. The text "VISITOR INDUSTRY PERFORMANCE" is overlaid in the center in a blue, sans-serif font.

# VISITOR INDUSTRY PERFORMANCE

# Visitor Industry Quick Facts

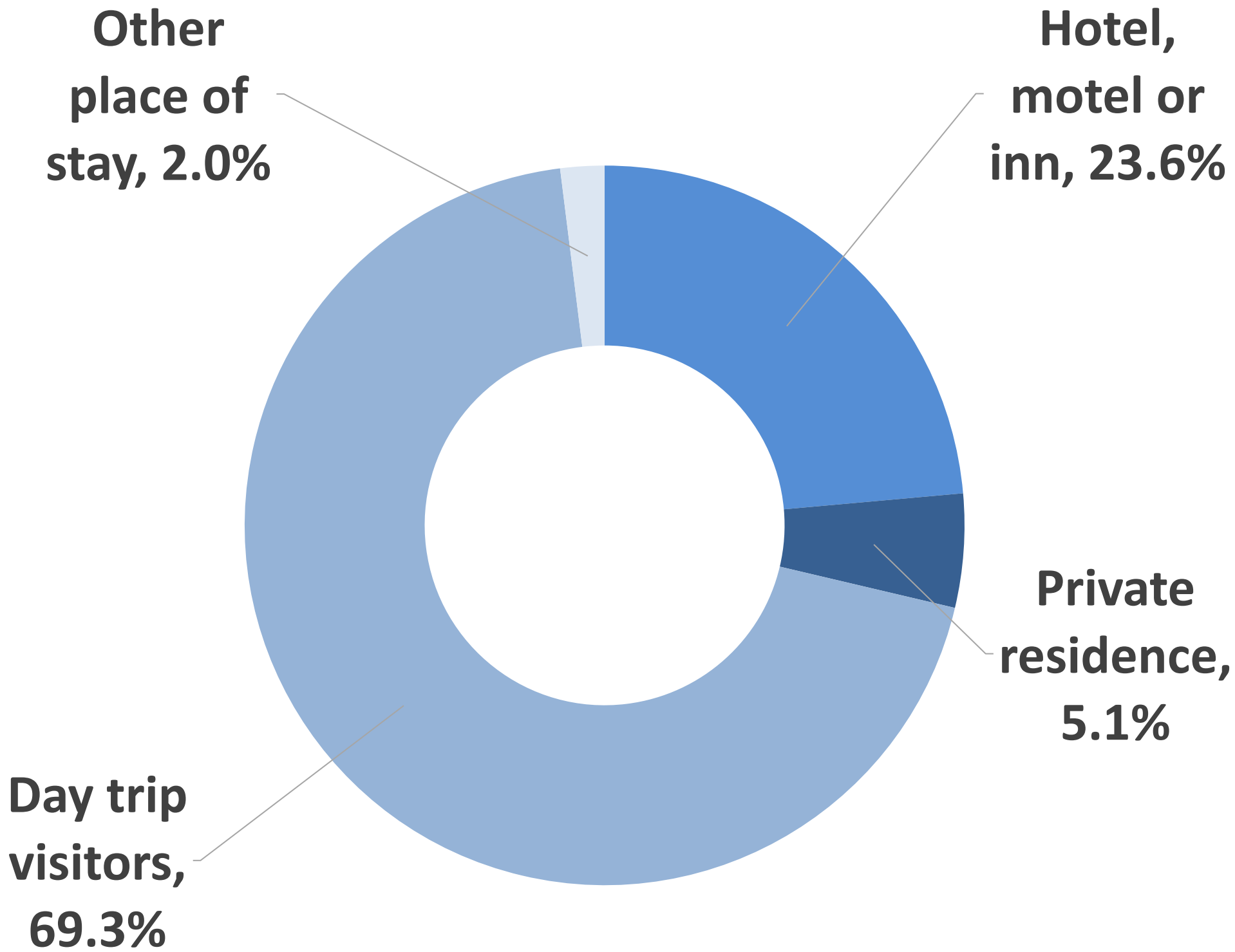
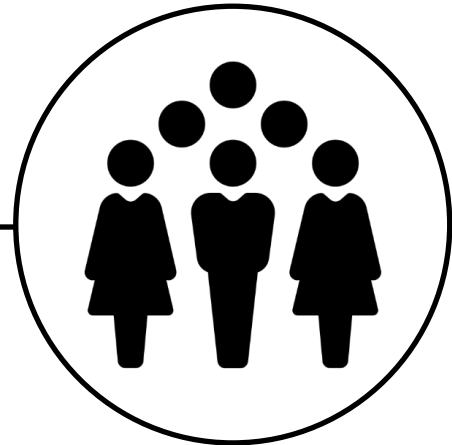
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A summary of the project's key findings are presented following:

	2012/13	2016/17	% CHNG
Visitors to Santa Barbara South Coast (annually, in millions)	6.1	7.2	18.0%
Hotel, Motels and Inns (annually, in millions)	1.5	1.7	13.3%
Private Homes (annually, in thousands)	323	369	14.2%
Day-trip Visitors (annually, in millions)	4.2	5.0	19.0%
Visitor Days Spent in Santa Barbara South Coast (annually, in millions)	9.3	10.5	12.9%
Average Daily Visitors to Santa Barbara South Coast	25,482	28,884	13.4%
Direct Visitor Spending in Santa Barbara South Coast (annually, in billions)	\$1.5	\$1.9	25.3%
Direct Visitor Spending per Santa Barbara South Coast Resident (annually)	\$10,317	\$13,241	28.3%
Jobs Supported by the Visitor Industry	12,001	13,482	12.3%
Taxes Generated for South Coast municipalities (annually, in millions)	\$46	\$56	21.7%
Taxes Generated (annually per Santa Barbara South Coast household)	\$832	\$1,031	23.9%

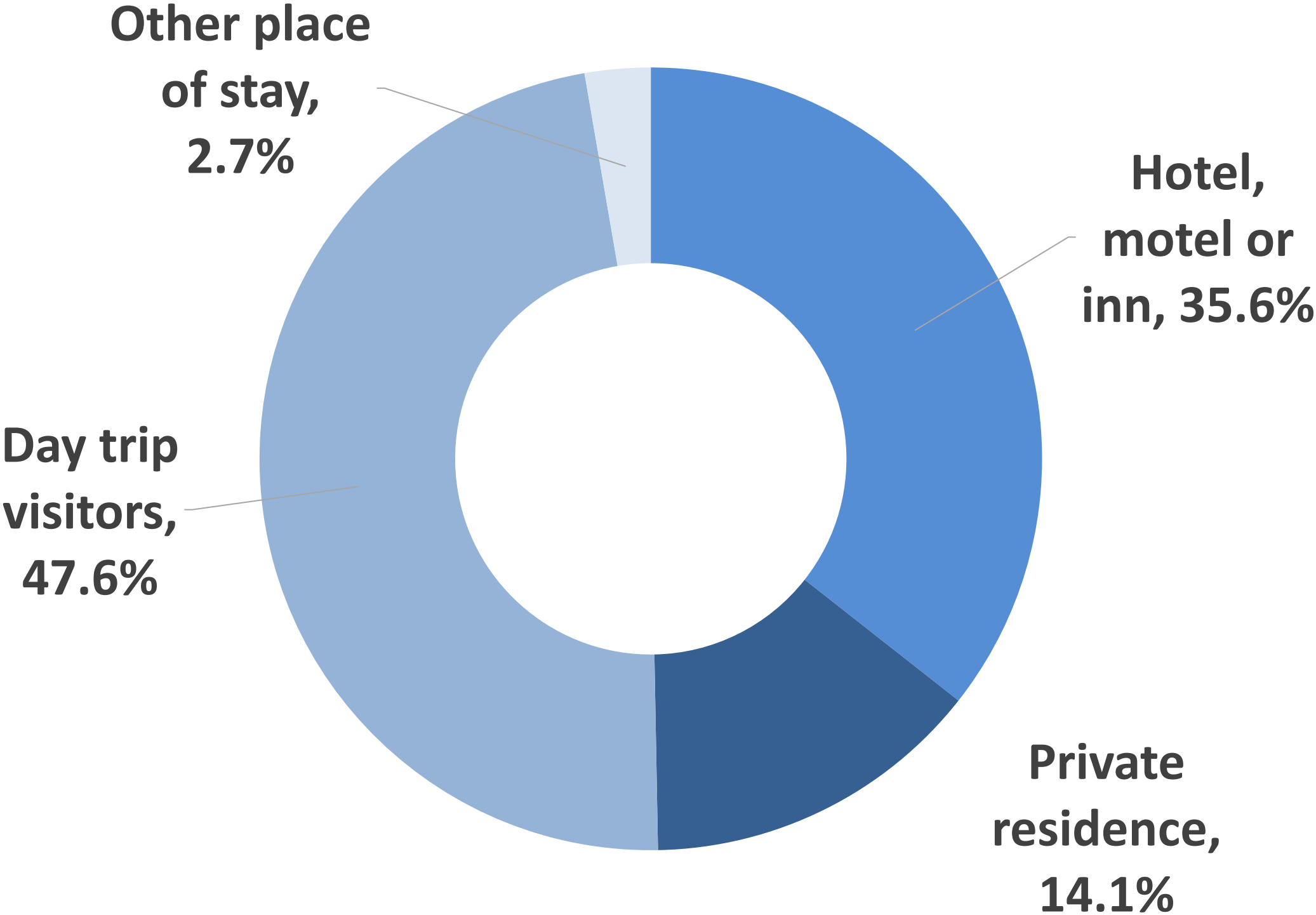
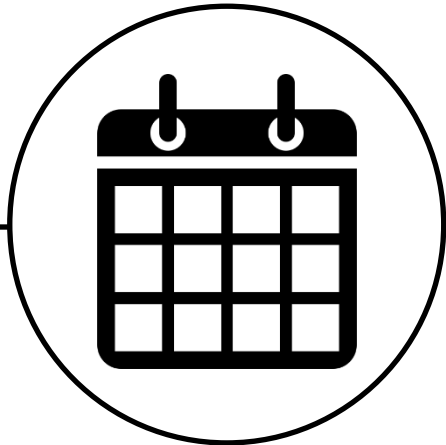


# Visitors to Santa Barbara South Coast



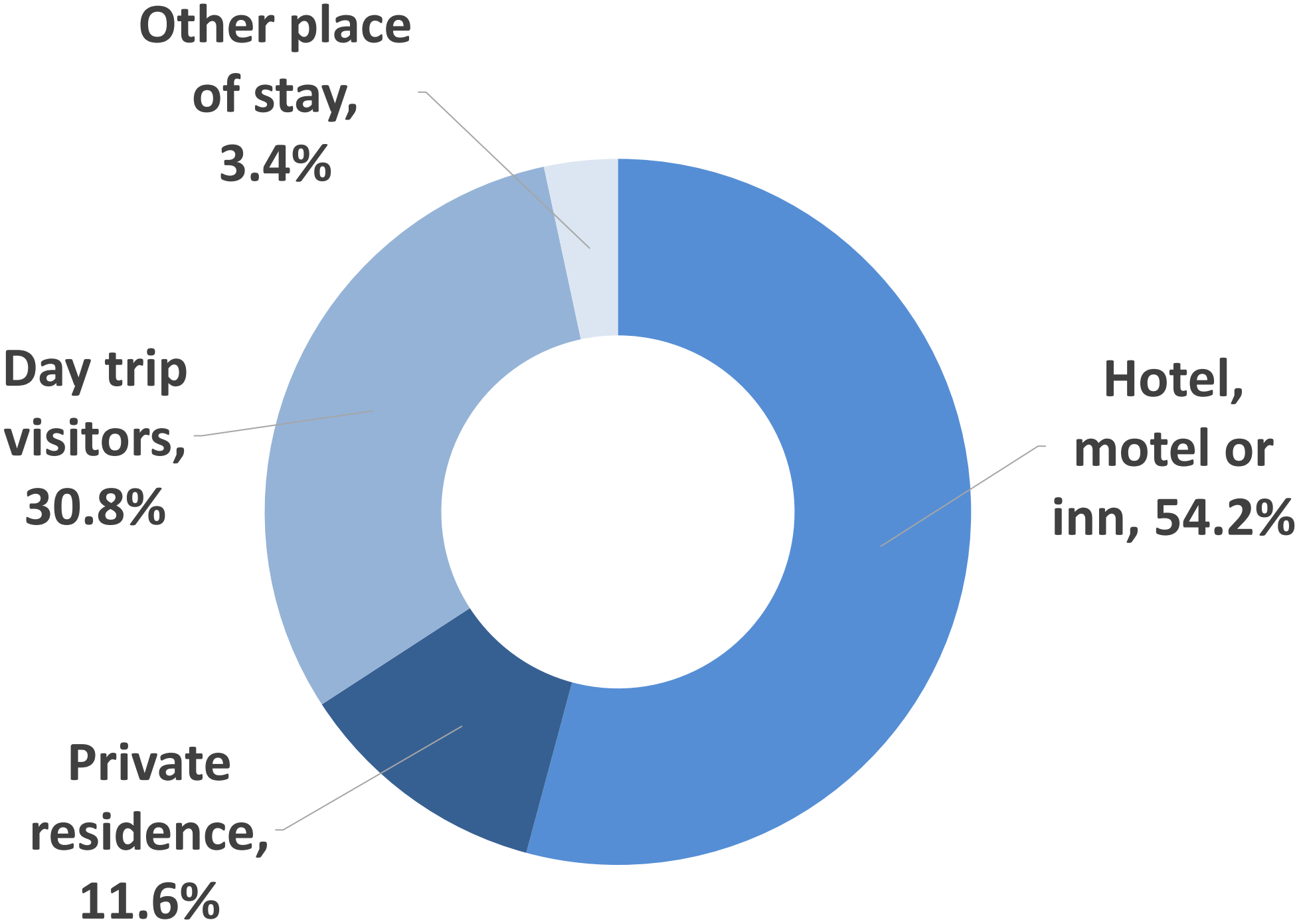
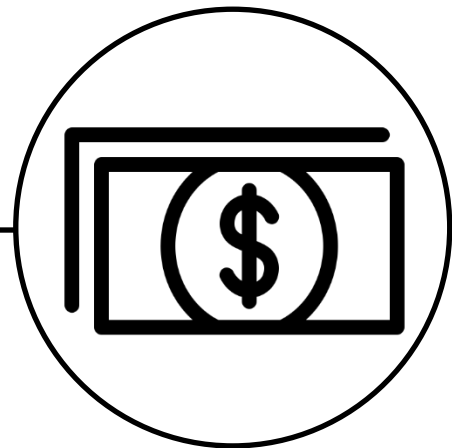
Visitors (annual, in thousands)	
Hotel, motel or inn	1,706
Private residence	369
Day trip visitors	5,016
Other place of stay	143
Total	7,234

# Visitor Days in Santa Barbara South Coast



Visitor Days (annual, in thousands)	
Hotel, motel or inn	3,753
Private residence	1,488
Day trip visitors	5,016
Other place of stay	286
Total	10,543

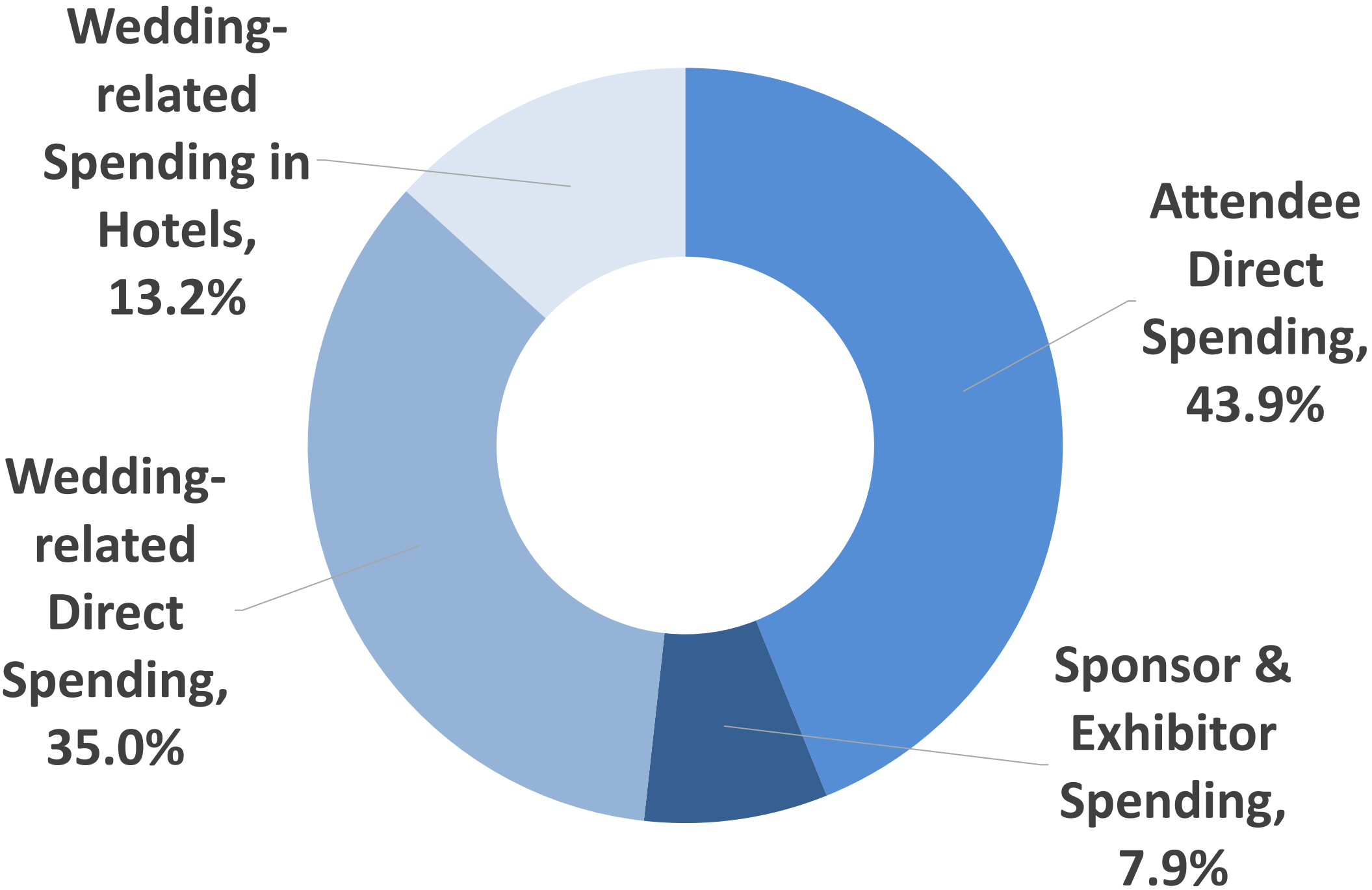
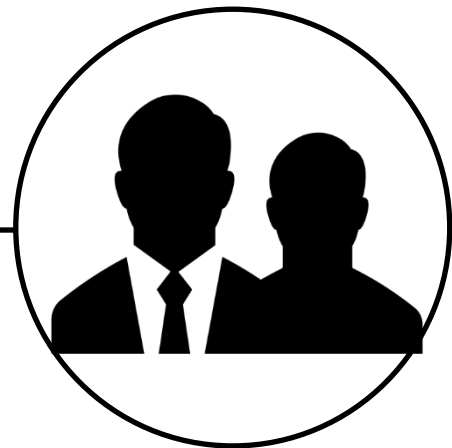
# Visitor Spending in Santa Barbara South Coast



Visitor Spending (annual, in thousands)	
Hotel, motel or inn	\$1,018,967
Private residence	\$219,003
Day trip visitors	\$579,563
Other place of stay	\$63,252
Total	\$1,880,785

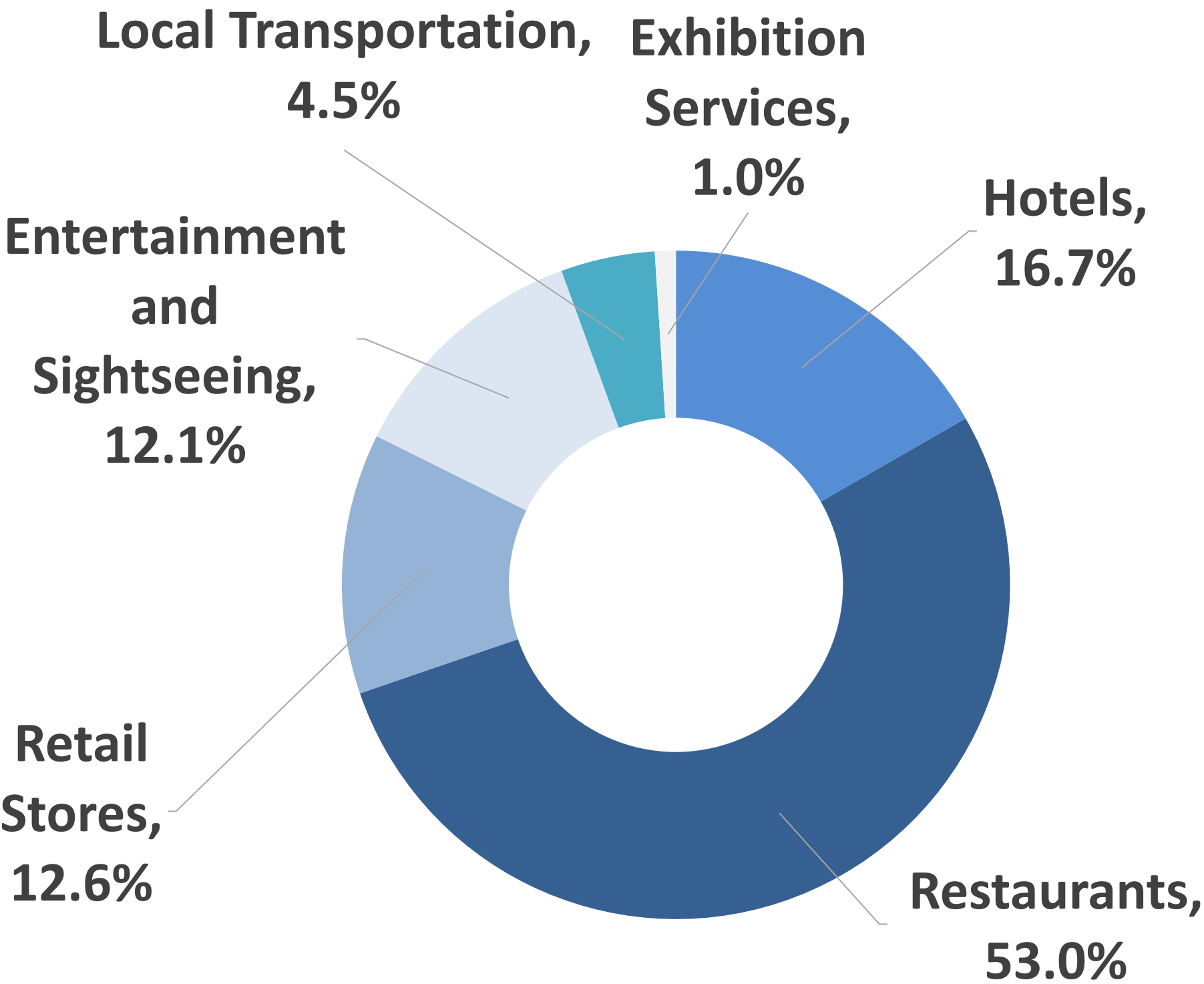


# Group Meeting & Wedding-Related Spending



Group-meeting & Wedding-related Spending	
Attendee Direct Spending	\$41,797,270
Sponsor & Exhibitor Spending	\$7,486,646
Wedding-related Direct Spending	\$33,342,539
Wedding-related Spending in Hotels	\$12,608,341
Total	\$95,234,796

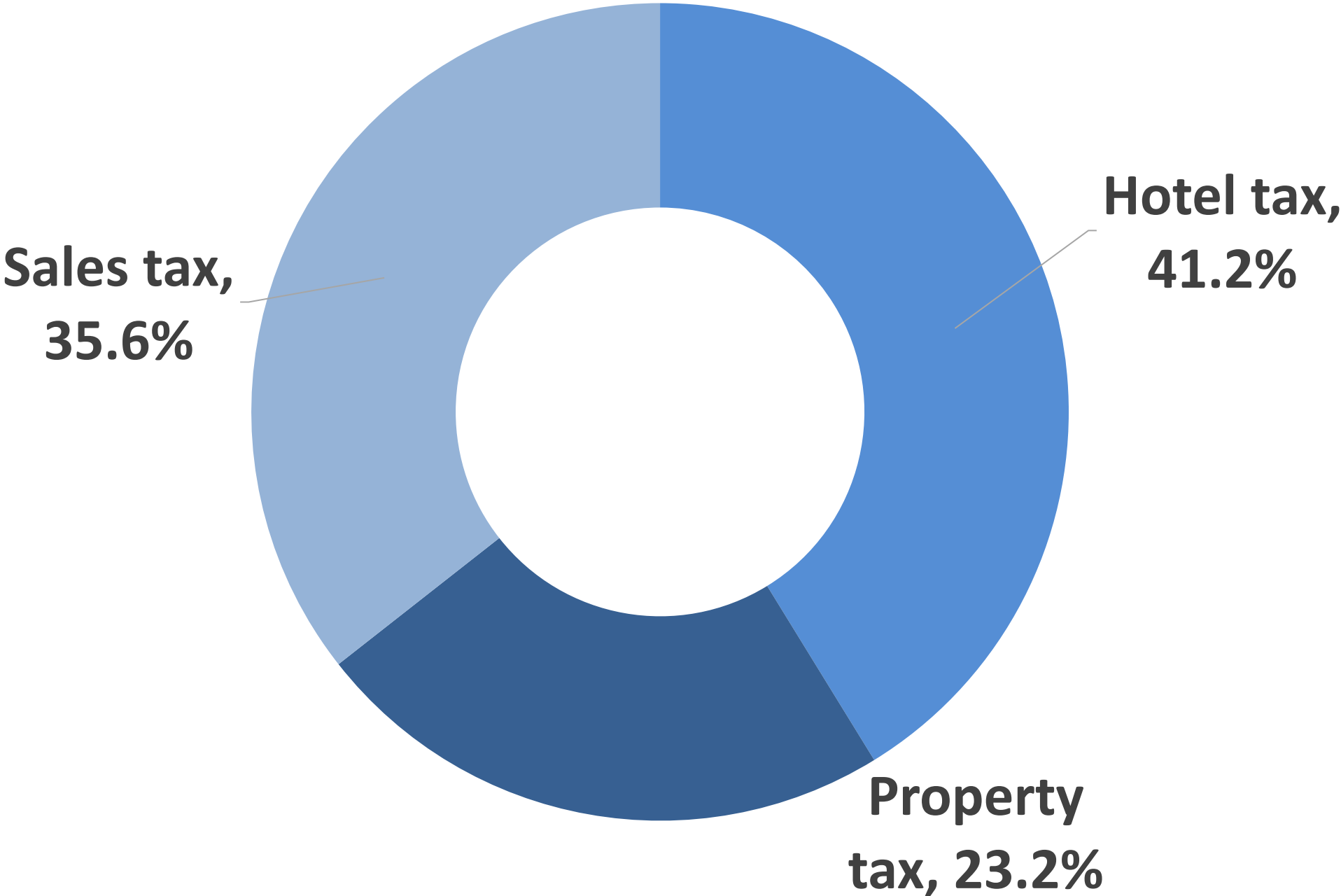
# Jobs Supported by Visitor Industry



INDUSTRY SEGMENT	Total Employment
Hotels	2,253
Restaurants	7,150
Retail Stores	1,699
Entertainment and Sightseeing	1,631
Local Transportation	613
Exhibition Services	137
Total Visitor Industry	13,482



# Tax Revenues Generated for South Coast Municipalities



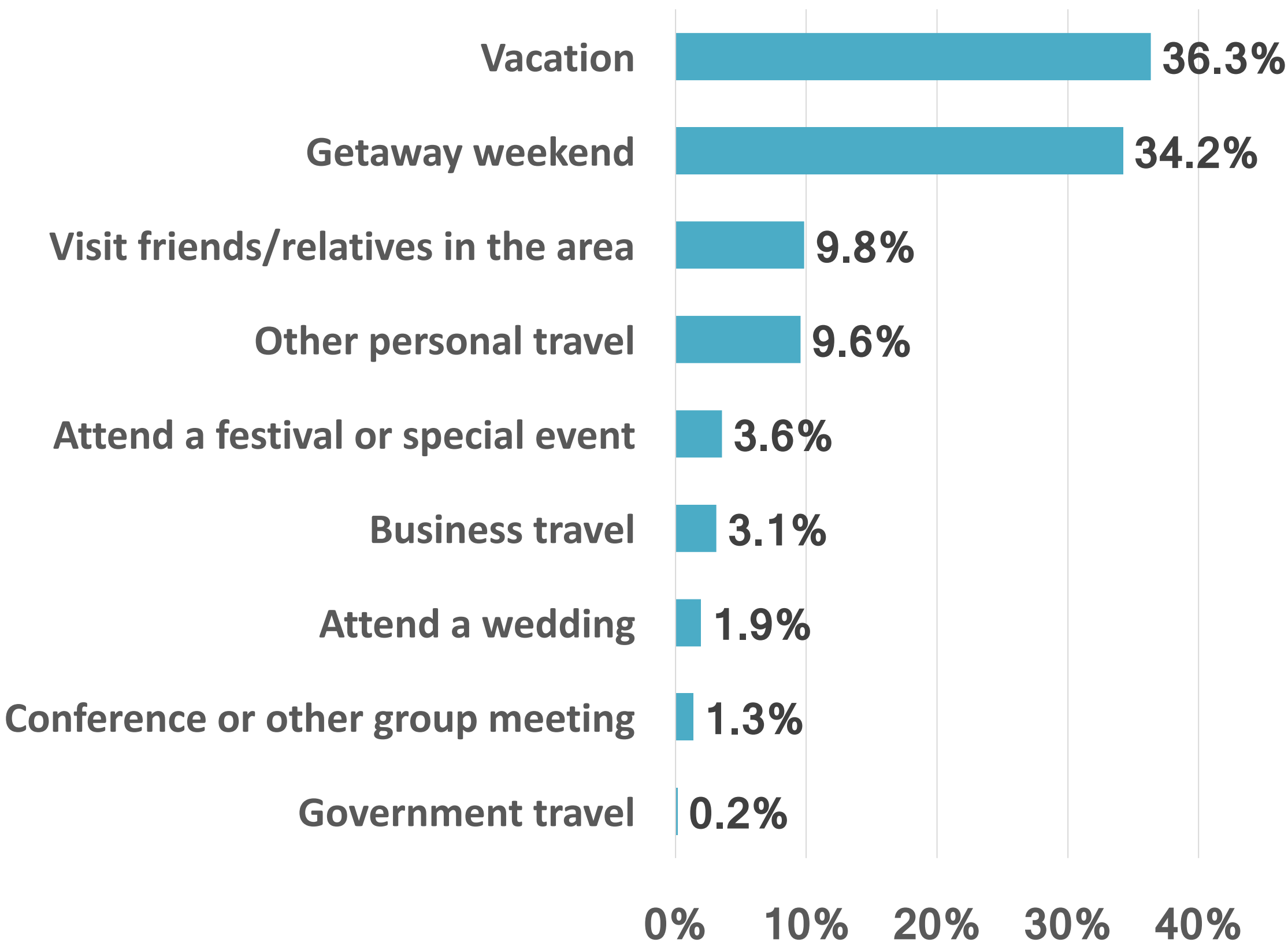
Derived Governmental Revenues Generated by the Visitor Industry		Total Annual Direct Revenue in 2016/17 \$1,000s
HOTEL TAX		
Hotel Tax Collected by Government Entities		\$23,097
PROPERTY TAX		
Property Taxes Paid to City Governments		\$12,995
SALES TAX		
Sales Tax Returned to City Governments		\$19,941
DIRECT REVENUES FROM VISITOR INDUSTRY		\$56,032



# DETAILED FINDINGS



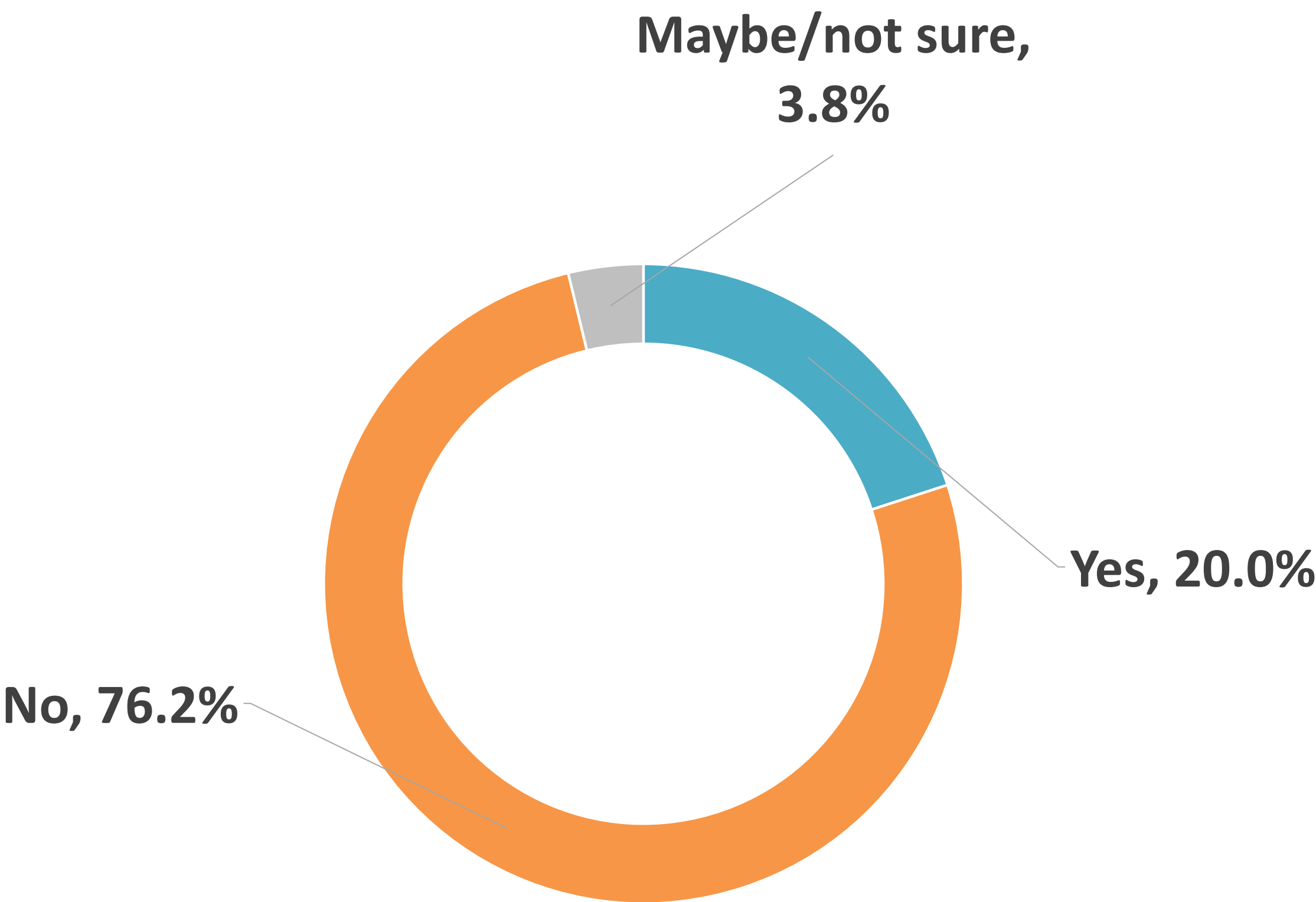
# Primary Reason for Visit



	Hotel Guest	VFR	Day Trip
Vacation	43.4%	25.1%	34.3%
Getaway weekend	23.9%	18.4%	39.1%
Visit friends/relatives in the area	8.0%	33.2%	8.9%
Other personal travel	6.6%	9.4%	10.6%
Attend a festival or special event	5.1%	4.5%	3.0%
Business travel	4.4%	3.6%	2.8%
Attend a wedding	4.0%	5.4%	0.9%
Conference or other group meeting	4.5%	0.4%	0.4%
Government travel	0.1%	0.0%	0.2%
Sample size:	880	223	540

Question: Which best describes the primary reason for making this visit to the Santa Barbara South Coast area? Base: All respondents. 1,752 responses.

# Business Travelers: Extended Stay in Santa Barbara for Leisure

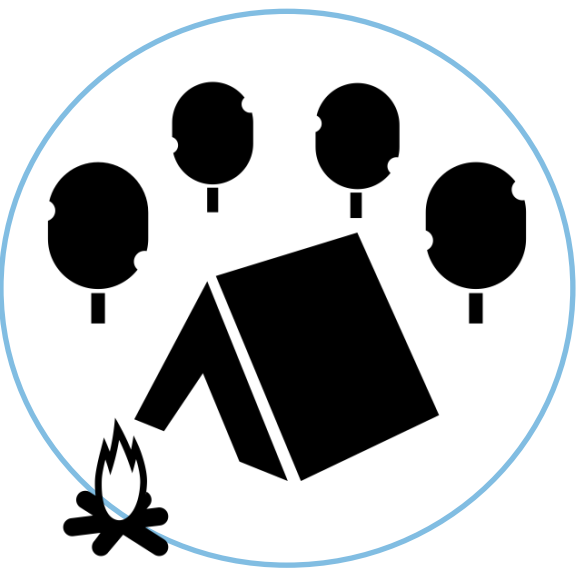
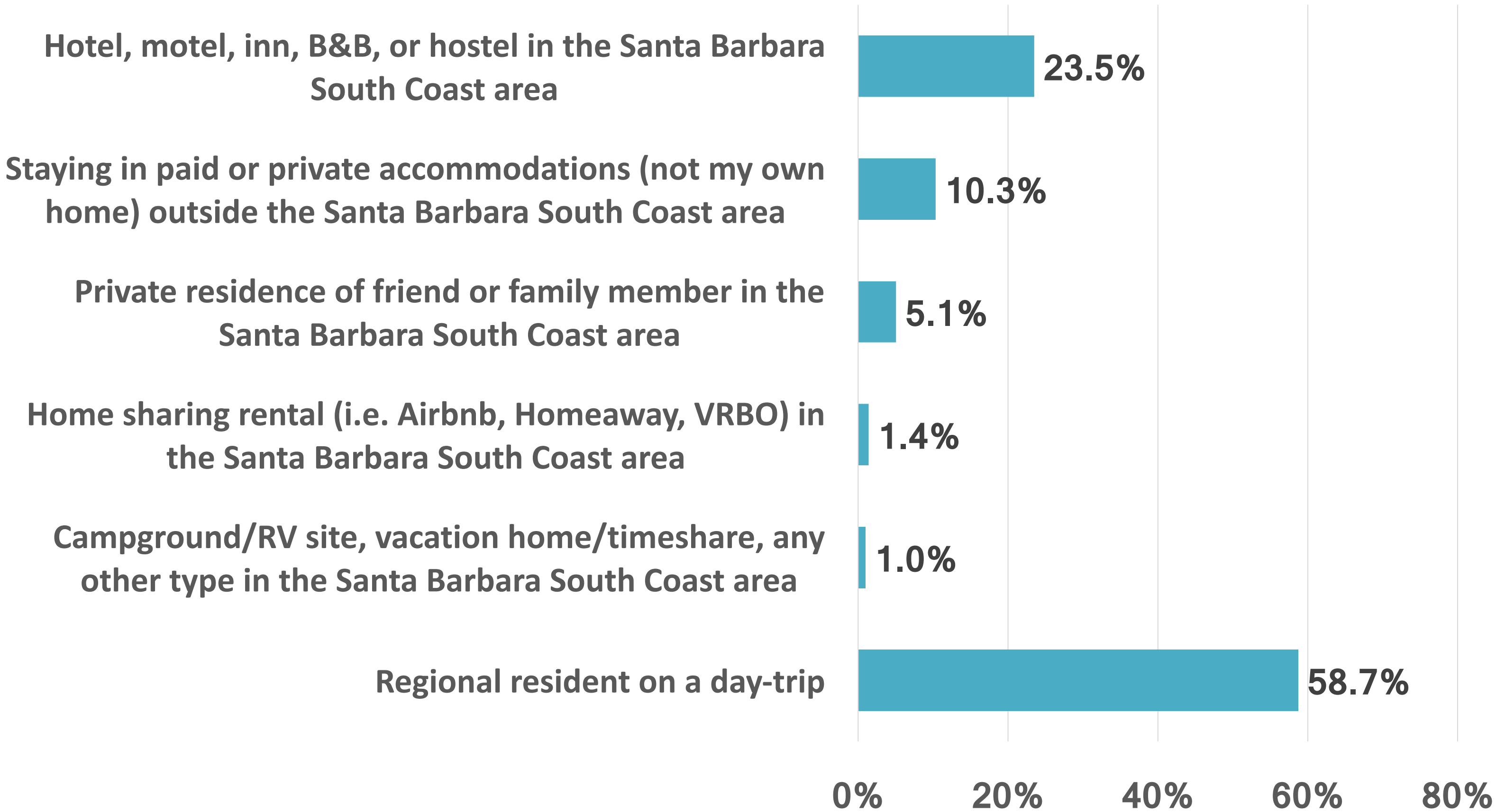


Question: If here on business, did you extend your stay in Santa Barbara any additional days beyond what was needed for your business/meeting to accommodate leisure activities? Base: Respondents in the destination for business, group meetings or government travel. 91 responses.



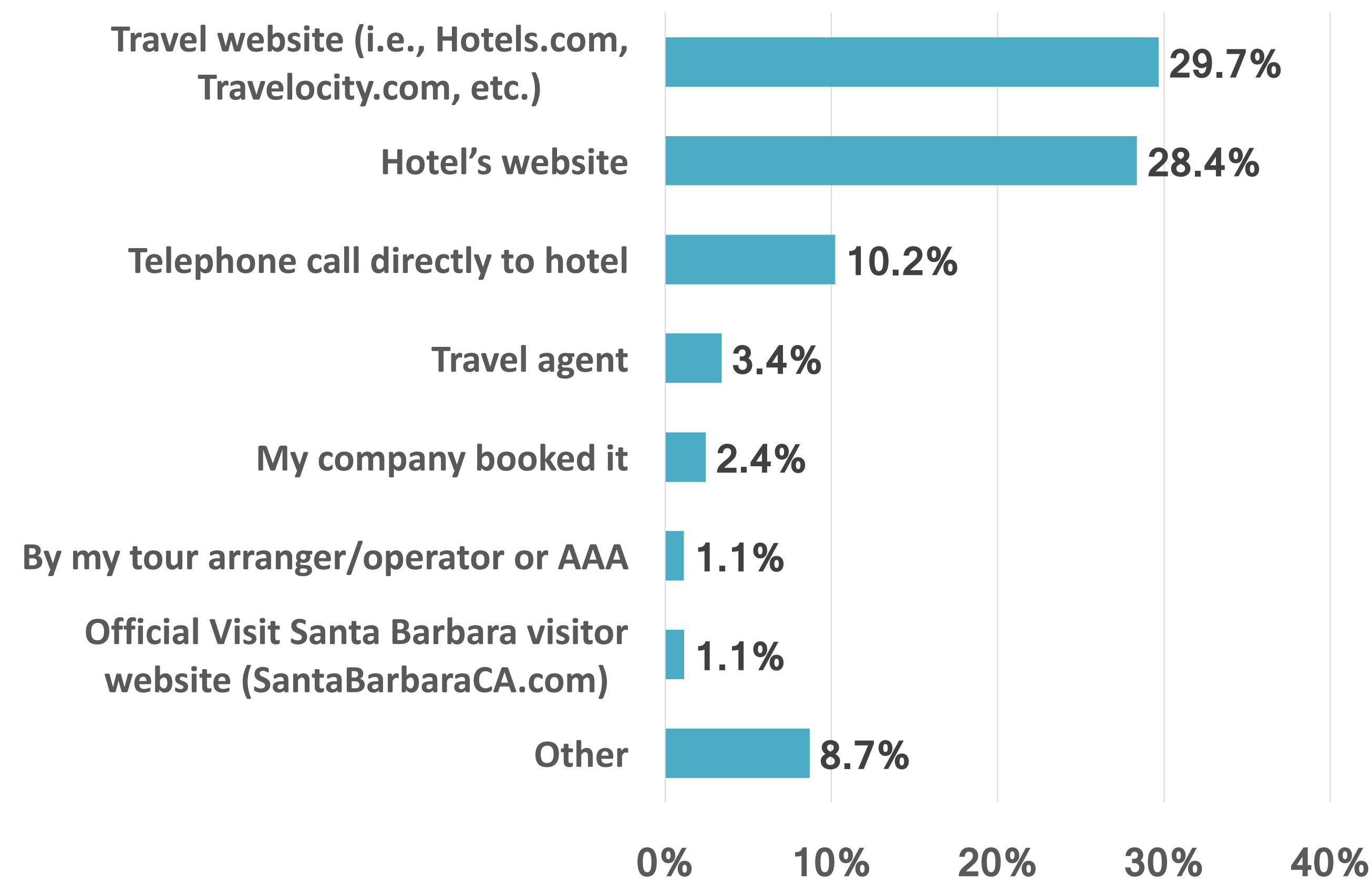


# Place of Stay

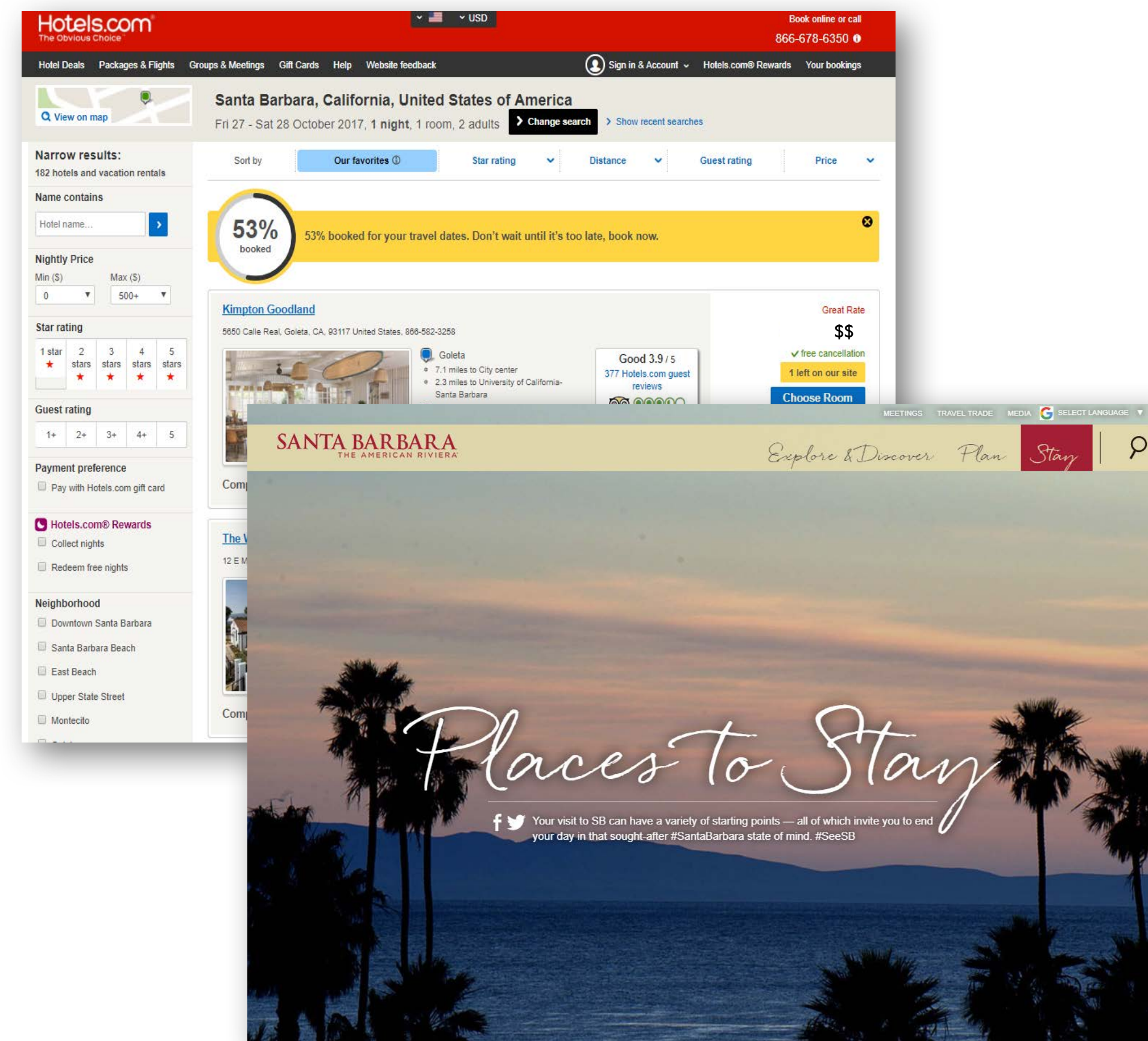


Question: Where are you staying overnight on this visit to the Santa Barbara South Coast area? Base: All respondents. 1,801 responses.

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

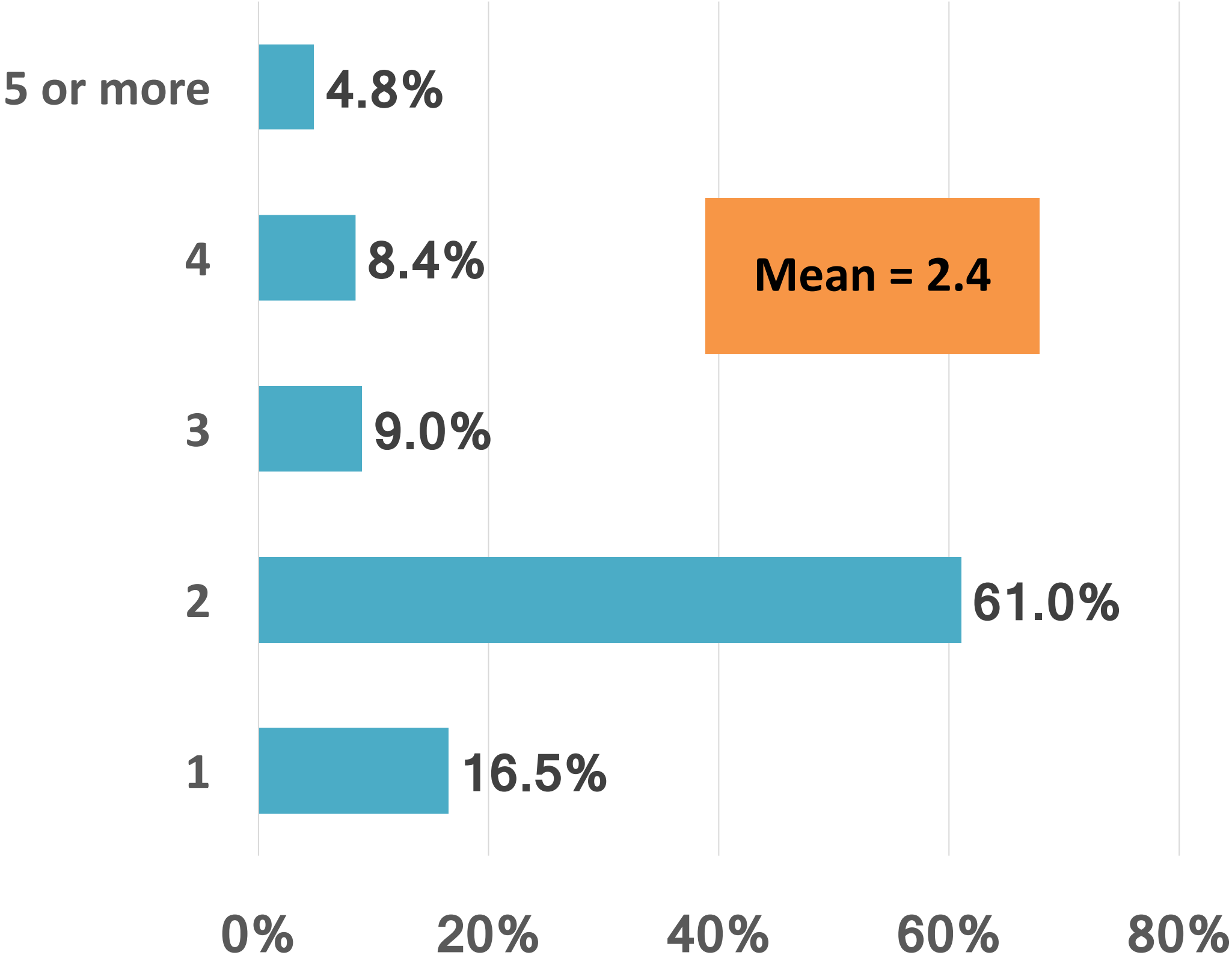


Question: How was your Santa Barbara South Coast area lodging reservation(s) made? (Select all that apply) Base: Respondents staying overnight in a Santa Barbara hotel; intercept survey only. 626 responses.





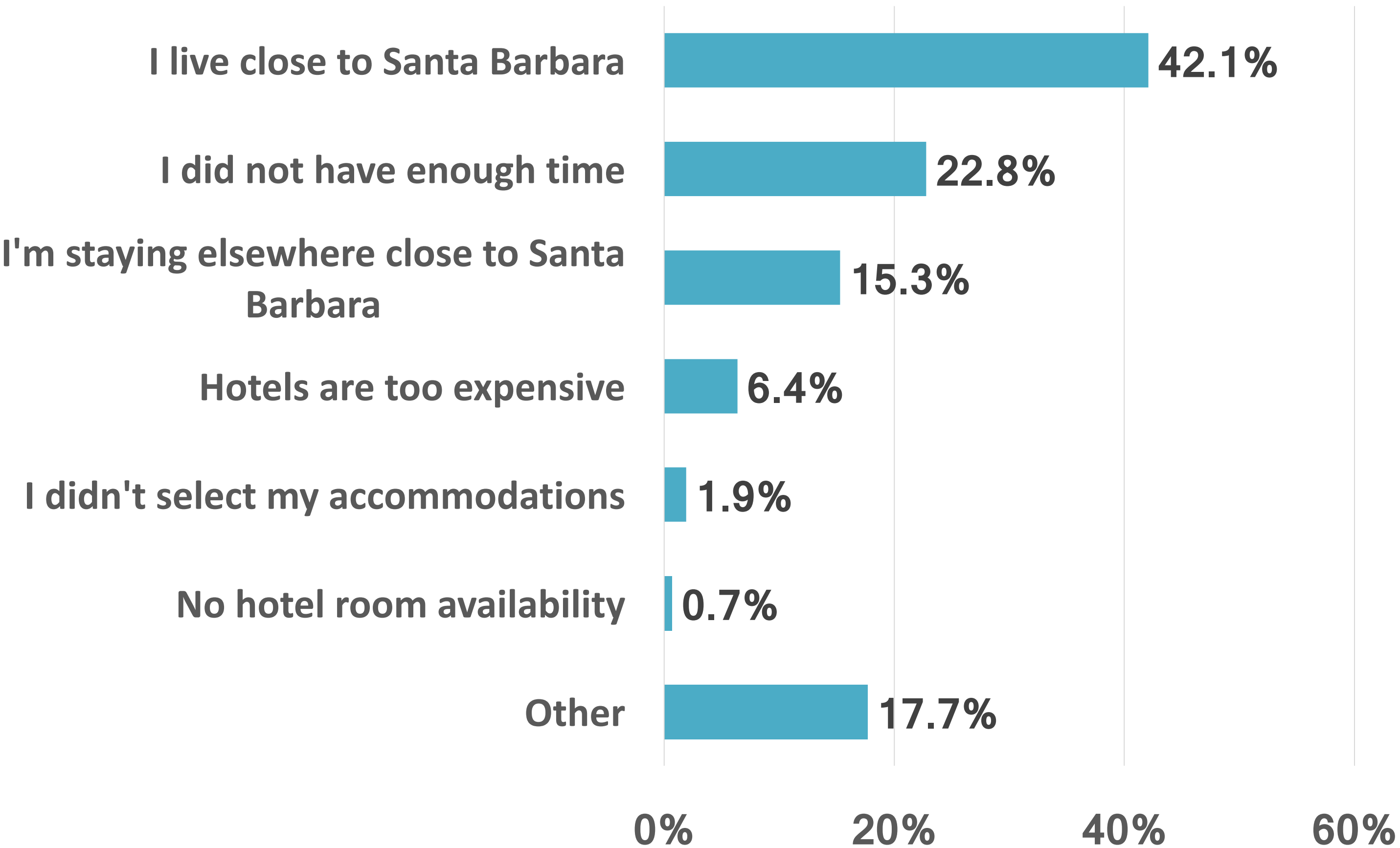
# Hotel Guests: Number of People in Hotel Room



Question: Including yourself, how many people are staying/stayed in your hotel room? Base: Respondents staying overnight in a Santa Barbara hotel. 951 responses.



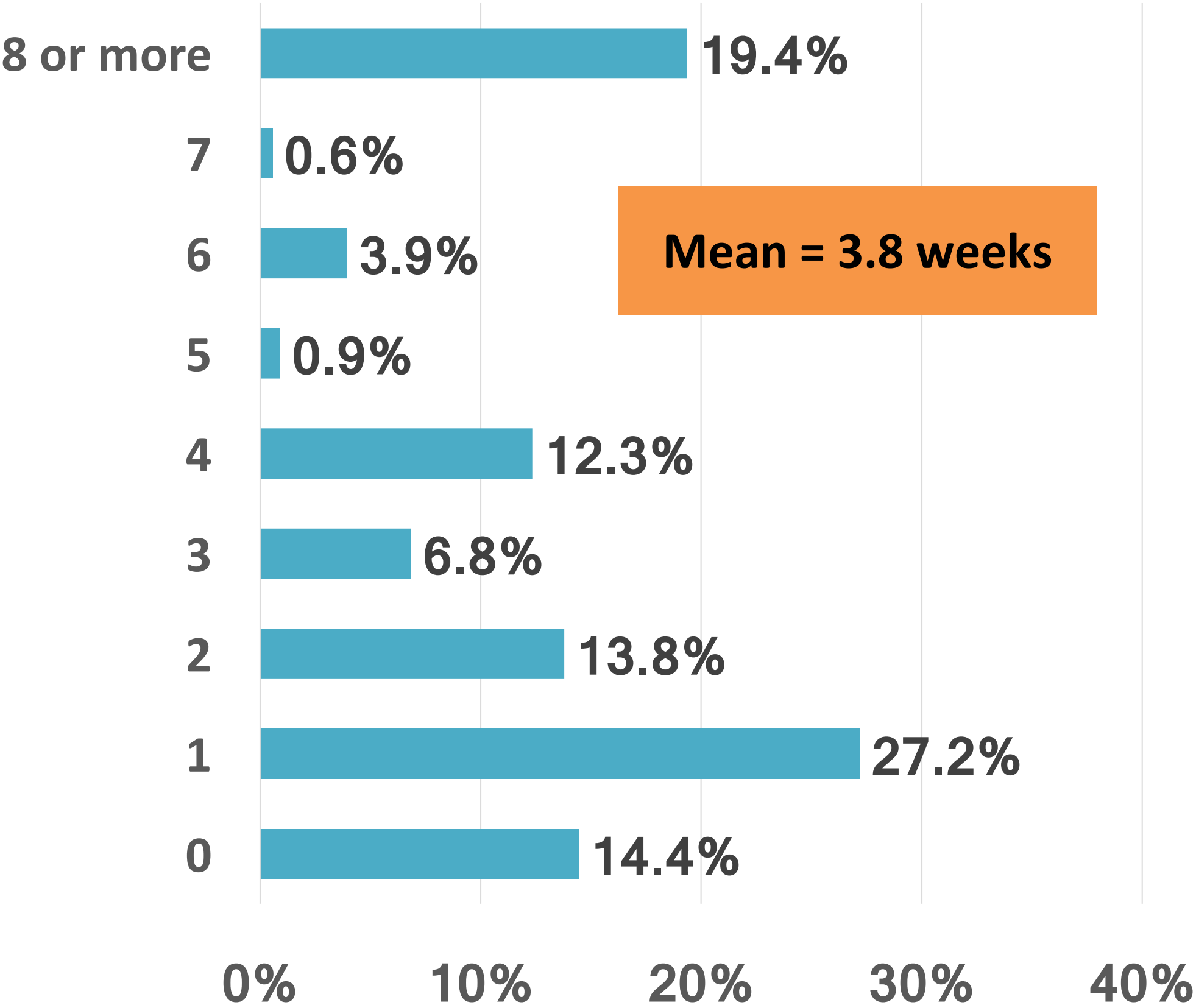
# Day Trip Visitors: Reasons for not Staying Overnight in Santa Barbara (Intercept Survey)



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. 449 responses.



# Weeks of Advanced Trip Planning



	Hotel Guest	VFR	Day Trip
8 or more	33.3%	26.2%	13.1%
7	0.9%	0.0%	0.5%
6	6.9%	0.5%	3.0%
5	2.0%	4.7%	0.2%
4	16.8%	13.6%	10.6%
3	10.1%	6.8%	5.7%
2	11.7%	22.5%	14.0%
1	13.9%	19.9%	32.9%
0	3.8%	4.7%	19.3%
Mean:	5.7	4.3	3.0
Sample size:	786	191	435

Question: How many weeks before leaving home did you begin planning this trip?  
Base: All respondents. 1,498 responses.

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

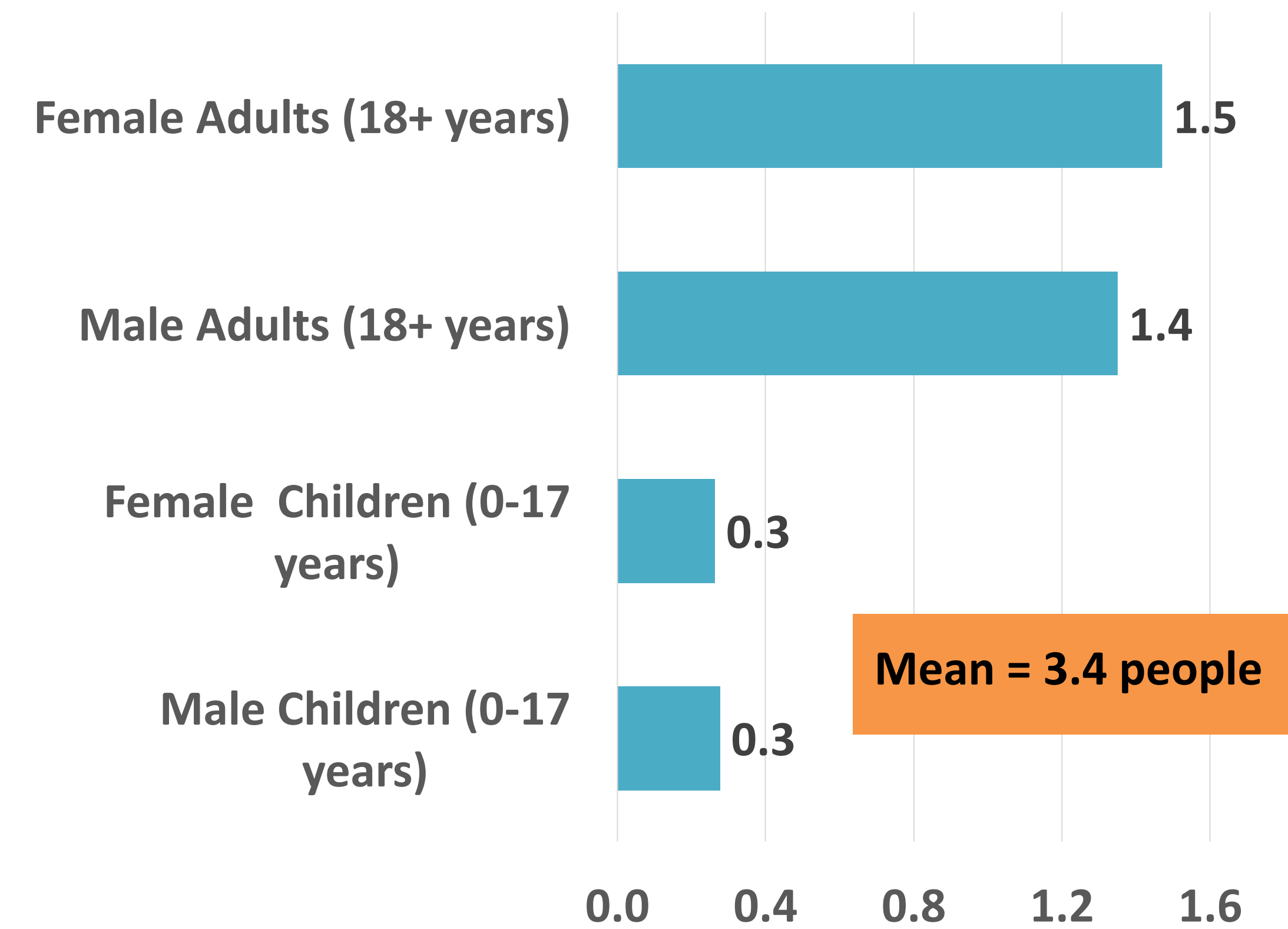
	Total Answering
5 or more	5.9%
4	4.7%
3	11.2%
2	9.6%
1	67.6%
Mean # of Days:	1.6
5 or more	4.5%
4	2.5%
3	5.6%
2	11.7%
1	7.6%
0	66.6%
Mean # of Nights:	0.8

	Hotel Guest	VFR	Day Trip
5 or more	11.9%	26.3%	--
4	12.1%	18.1%	--
3	28.8%	26.9%	--
2	31.0%	21.9%	--
1	15.1%	6.3%	100.0%
Mean # of Days	2.8	3.3	1.0
5 or more	7.0%	19.4%	--
4	6.3%	15.0%	--
3	10.8%	17.5%	--
2	29.5%	27.5%	--
1	21.6%	16.3%	--
0	23.2%	1.3%	100.0%
Mean # of nights	1.8	2.7	0.0
Sample size:	555	160	393

Question: How many days and nights are you staying in Santa Barbara area? Base: All respondents. 1,191 responses.



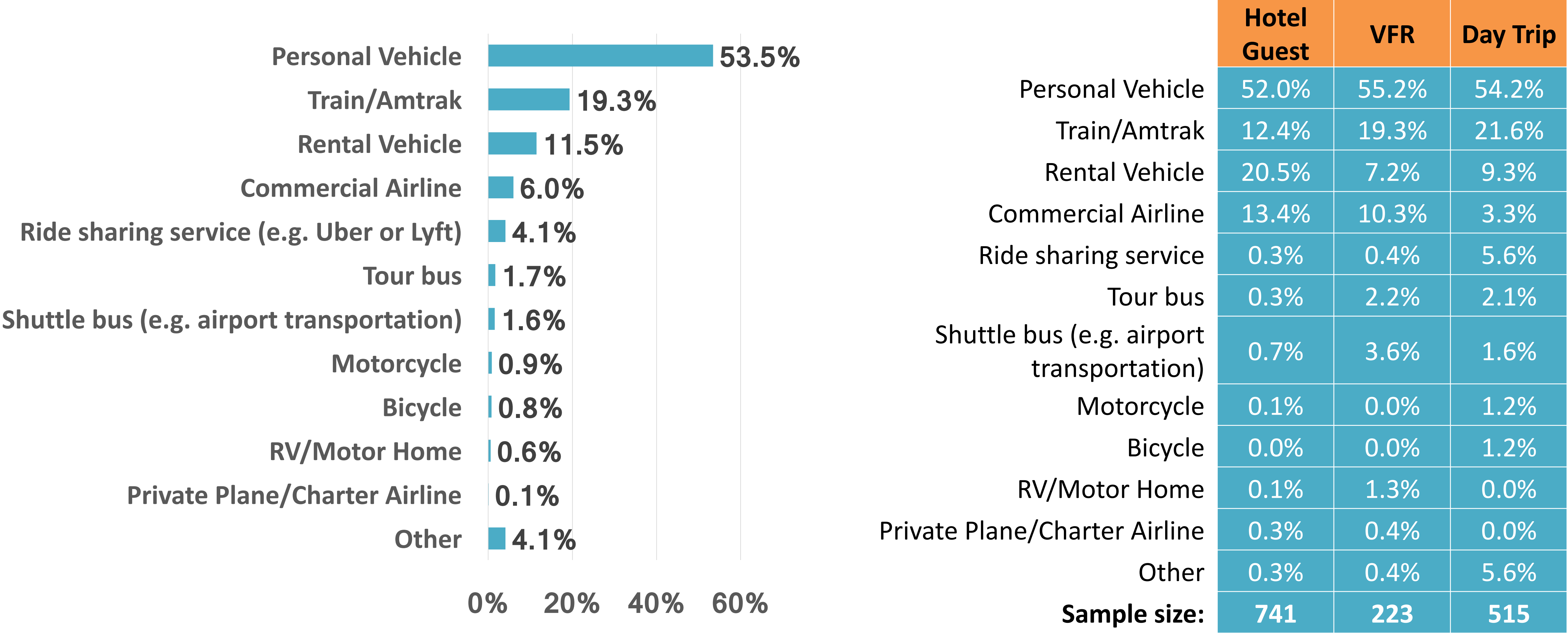
# Travel Party Composition



	Hotel Guest	VFR	Day Trip
Female Adults (18+ years)	1.4	1.3	1.5
Male Adults (18+ years)	1.2	1.0	1.4
Female Children (17 years or younger)	0.1	0.2	0.3
Male Children (17 years or younger)	0.1	0.2	0.3
Mean	2.9	2.7	3.5
% with children	12.2%	21.2%	25.7%
Sample size:	895	226	544

Question: Please tell us how many people (including yourself) are in your immediate travel party. Base: All respondents. 1,774 responses.

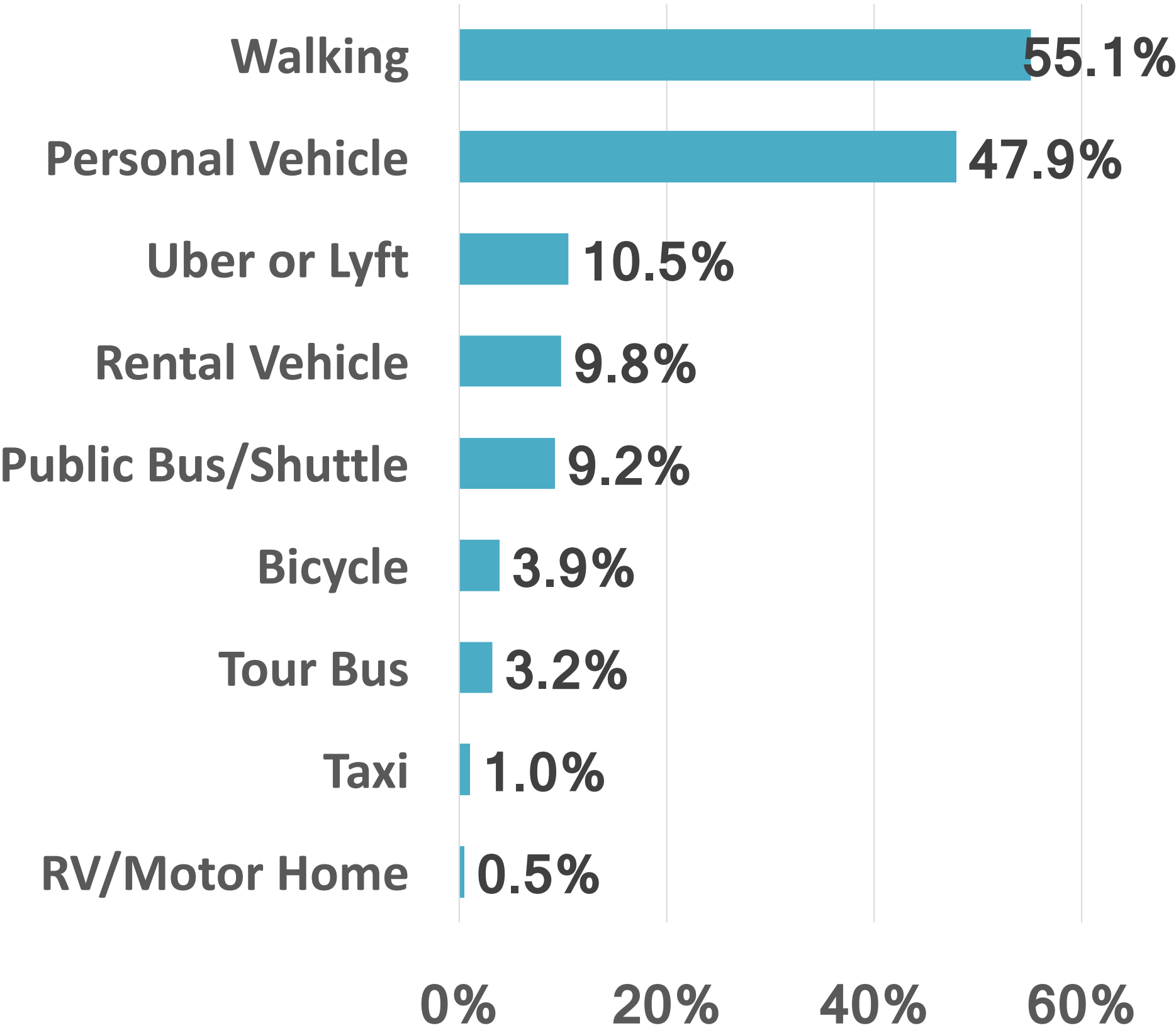
# Method of Arrival



Question: How did you arrive in the Santa Barbara area area? (Select one) Base: All respondents. 1,586 responses.



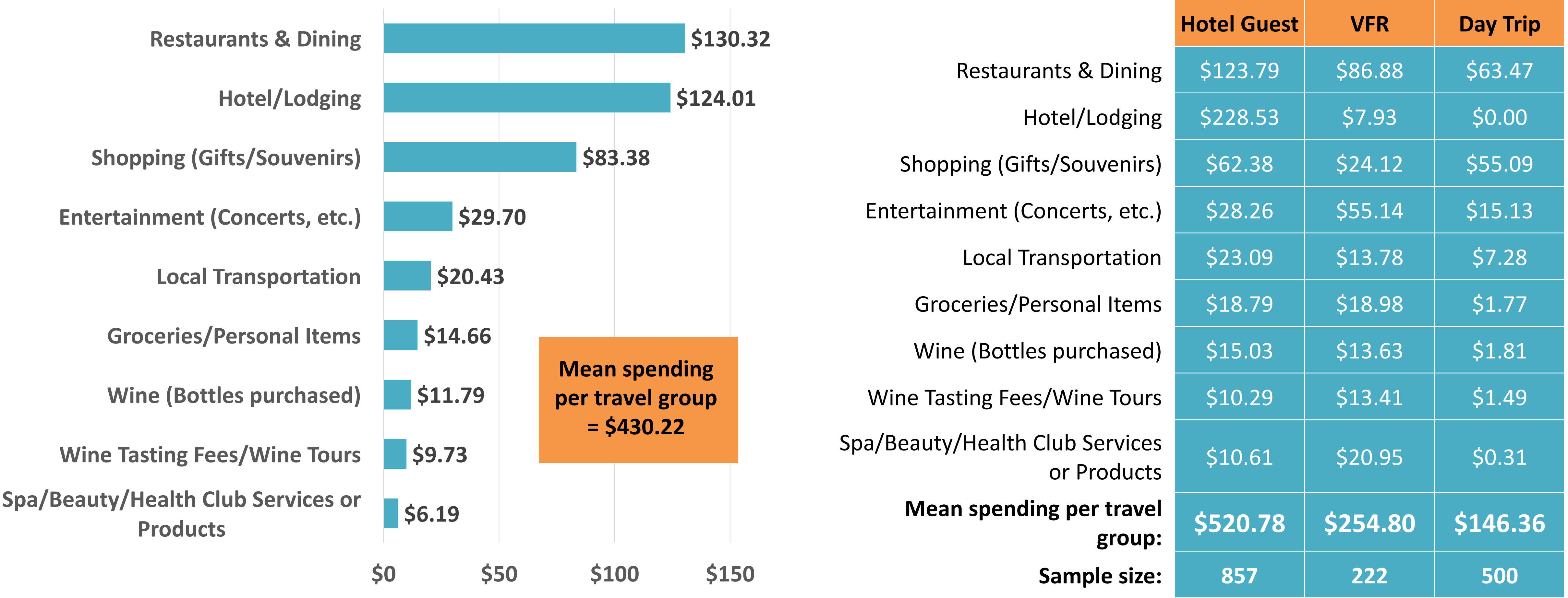
# Transportation Used In-Market (Intercept Survey)



	Hotel Guest	VFR	Day Trip
Walking	51.2%	43.0%	57.1%
Personal Vehicle	41.5%	70.6%	47.1%
Uber or Lyft	21.4%	19.7%	7.8%
Rental Vehicle	27.4%	7.5%	6.9%
Public Bus/Shuttle	7.1%	9.2%	9.5%
Bicycle	3.7%	9.2%	3.3%
Tour Bus	0.9%	0.9%	3.8%
Taxi	1.4%	1.3%	0.9%
RV/Motor Home	0.2%	0.4%	0.2%
Sample size:	434	228	548

Question: How did you (or will you) get around the Santa Barbara South Coast area? (Select all that apply) Base: All respondents. 1,320 responses.

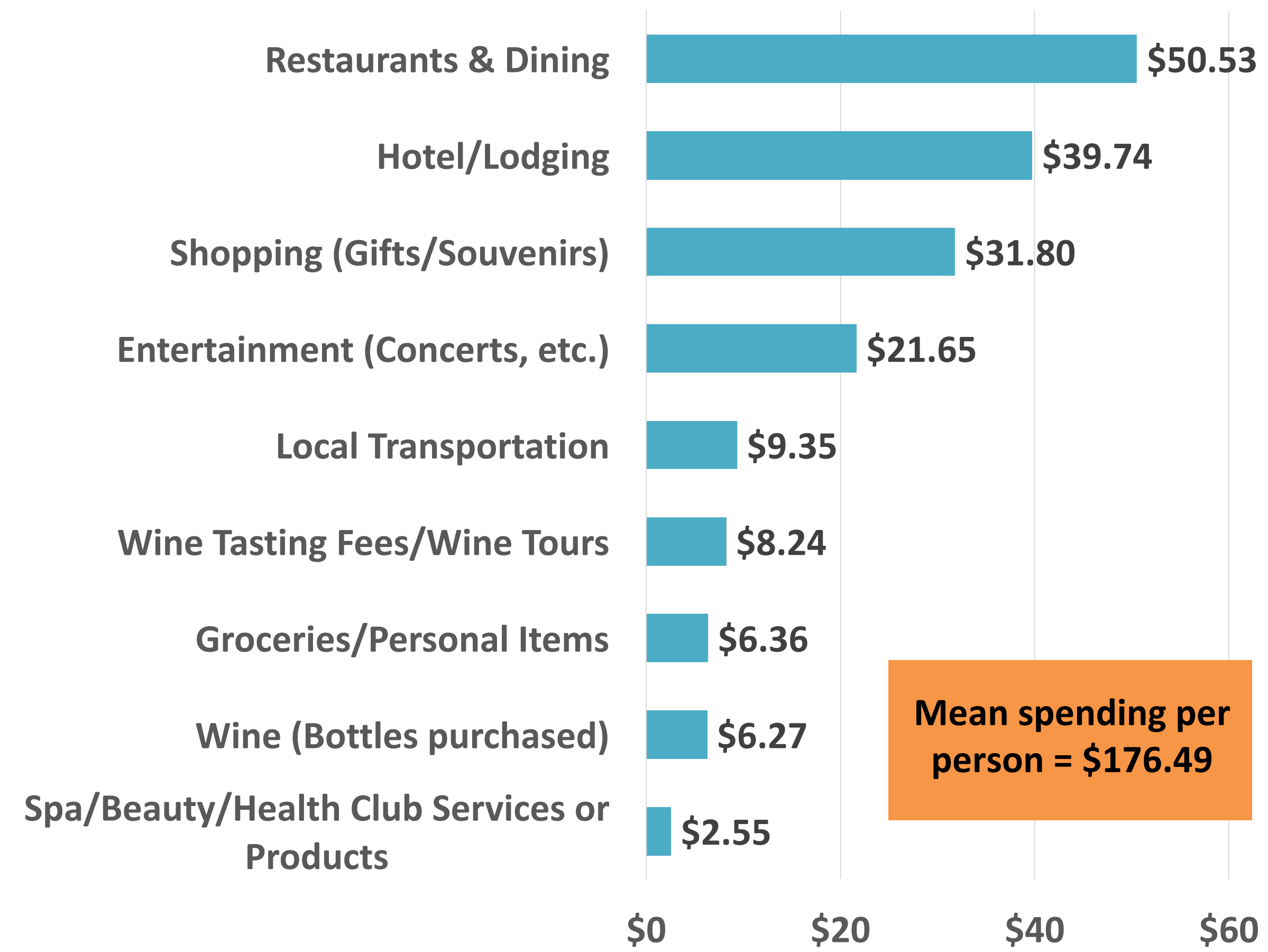
# Daily Spending, Per Travel Group



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? Base: All respondents. 1,685 responses.



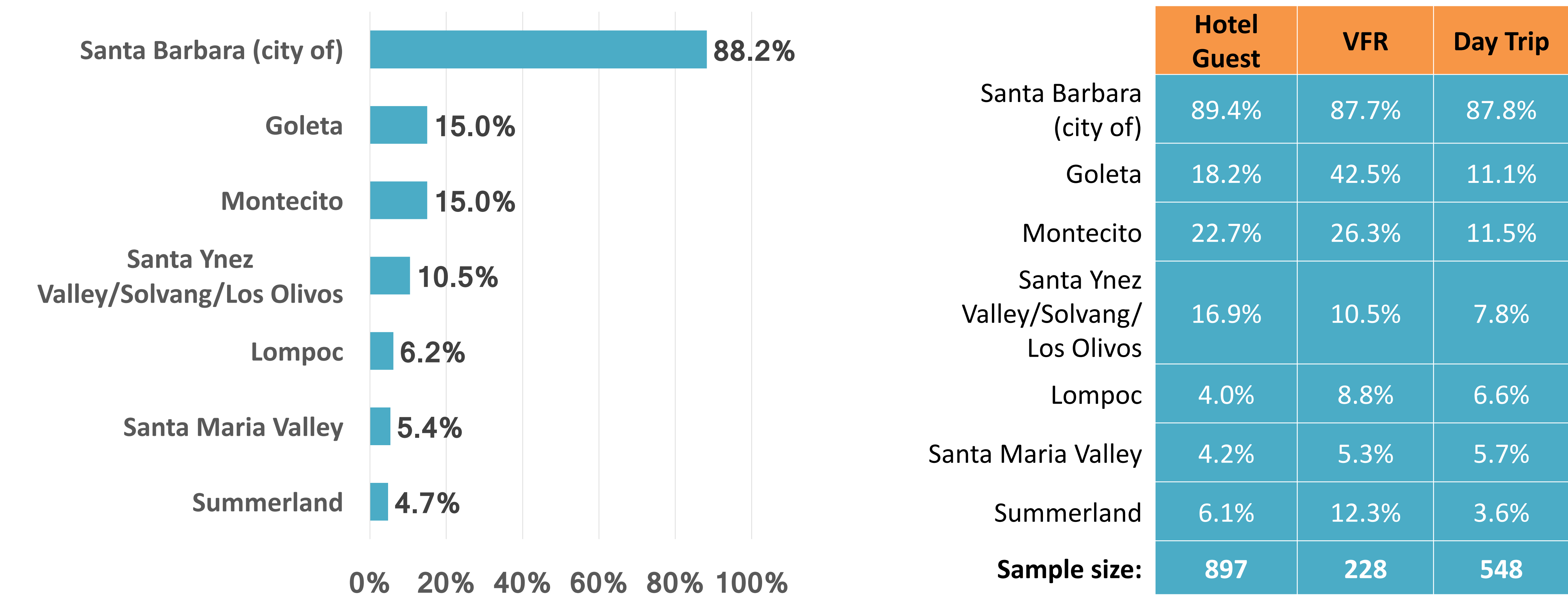
# Daily Spending, Per Person



	Hotel Guest	VFR	Day Trip
Restaurants & Dining	\$68.90	\$44.71	\$38.34
Hotel/Lodging	\$104.81	\$4.08	\$0.00
Shopping (Gifts/Souvenirs)	\$32.87	\$40.79	\$28.64
Entertainment (Concerts, etc.)	\$18.99	\$17.87	\$24.32
Local Transportation	\$9.31	\$9.77	\$9.16
Groceries/Personal Items	\$6.46	\$13.54	\$3.73
Wine (Bottles purchased)	\$8.14	\$7.01	\$4.61
Wine Tasting Fees/Wine Tours	\$12.22	\$6.90	\$5.51
Spa/Beauty/Health Club Services or Products	\$4.46	\$2.56	\$1.22
Mean spending per person	\$266.16	\$147.23	\$115.54
Sample size:	857	222	500

Question: How many persons’ travel expenses does this spending fully cover? Base: All respondents. 1,666 responses.

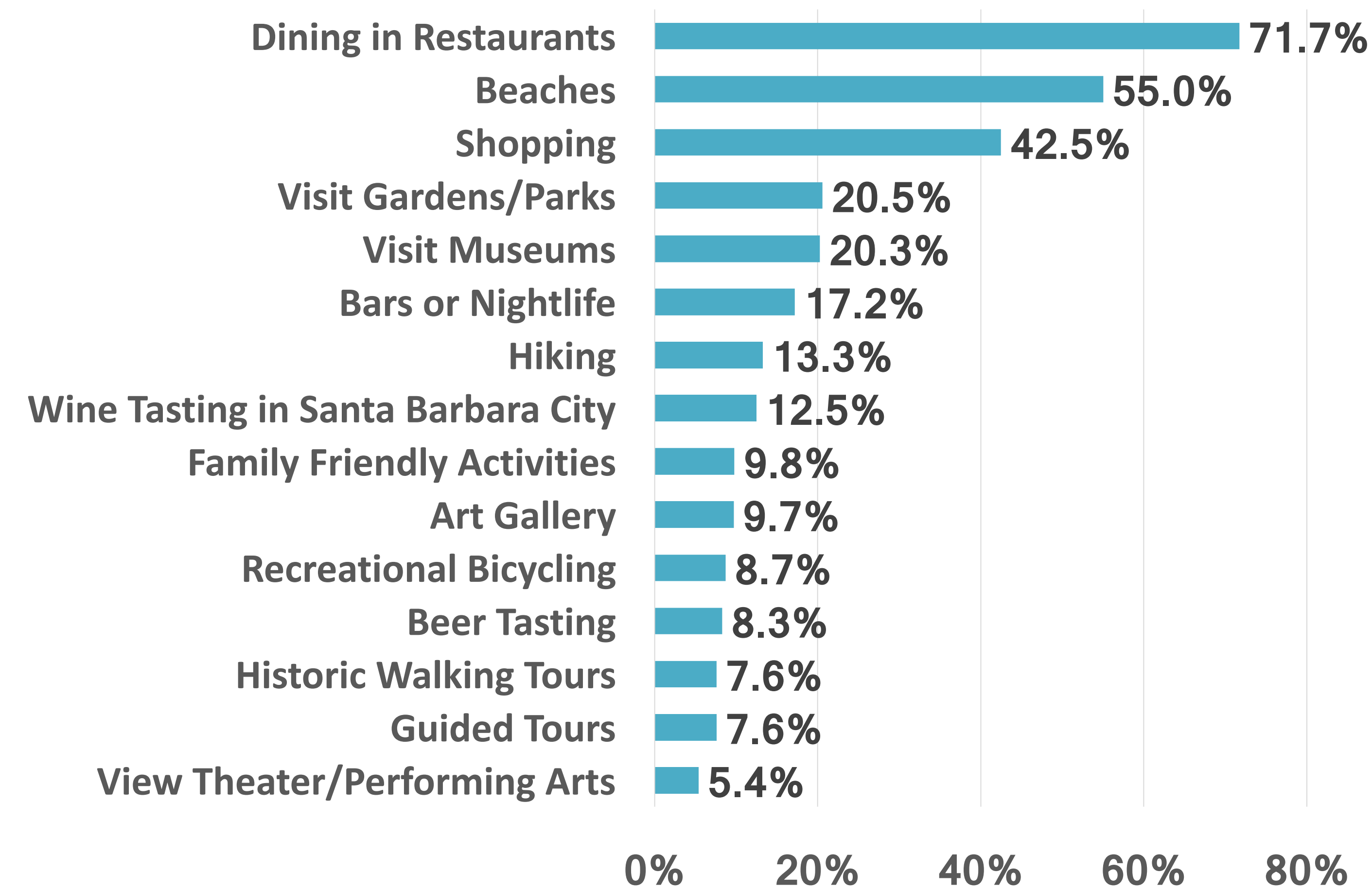
# Santa Barbara County Areas Visited



Question: On this trip, which of these Santa Barbara County areas and towns did you visit? (Select all that apply) Base: All respondents. 1,783 responses.



# Activities Participated in while in the Santa Barbara Area



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. 1,780 responses.



# Activities – Full Detail

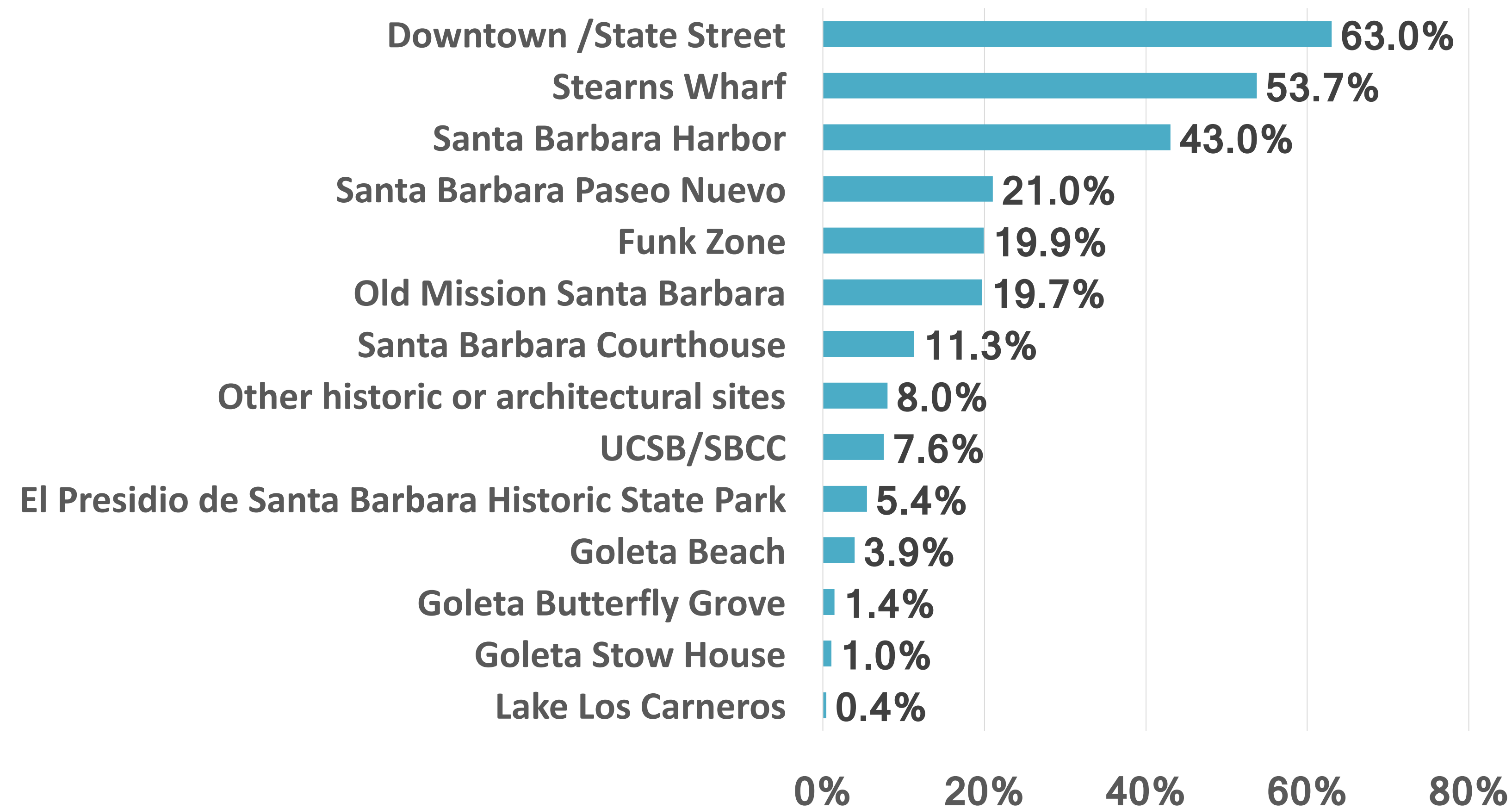
	Hotel Guest	VFR	Day Trip
Dining in Restaurants	79.1%	75.4%	68.4%
Beaches	58.9%	68.4%	51.8%
Shopping	50.1%	46.9%	39.1%
Visit Gardens/Parks	25.7%	21.1%	18.6%
Visit Museums	24.3%	28.9%	18.1%
Bars or Nightlife	26.8%	35.1%	12.0%
Hiking	14.9%	33.3%	10.4%
Wine Tasting in Santa Barbara City	16.7%	14.0%	10.8%
Family Friendly Activities	9.4%	20.2%	8.8%
Art Gallery	11.7%	11.4%	8.8%
Recreational Bicycling	10.7%	14.5%	7.1%
Beer Tasting	9.5%	12.7%	7.1%
Historic Walking Tours	9.2%	3.9%	7.3%
Guided Tours	10.4%	6.6%	6.6%
View Theater/Performing Arts	9.2%	9.6%	3.6%
Special Event or Festival	6.9%	6.6%	2.9%
Wine Tasting in Santa Ynez Valley	8.4%	2.2%	2.6%
Whale watching	4.8%	4.8%	2.6%
Visit Spa	6.6%	2.6%	1.6%
Kayaking	1.9%	7.0%	2.4%
Sailing	2.0%	3.9%	2.7%
Surfing / Stand-up Paddle Boarding	1.8%	7.5%	2.0%
Channel Islands excursion	1.3%	1.3%	1.5%
Sports Tournament or Event	1.6%	0.0%	1.5%
Golfing	1.2%	1.8%	1.1%
Wine Tasting in Santa Maria Valley	1.1%	0.0%	0.5%
Wine Tasting in Lompoc	1.3%	0.0%	0.4%
Cycling (Organized Tour, Event, Race or Independent Touring)	1.1%	0.0%	0.0%
Sample size:	894	228	548

**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. 1,780 responses.



# Attractions Visited while in the Santa Barbara Area



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. 1,780 responses.

# Attractions Visited – Complete Detail

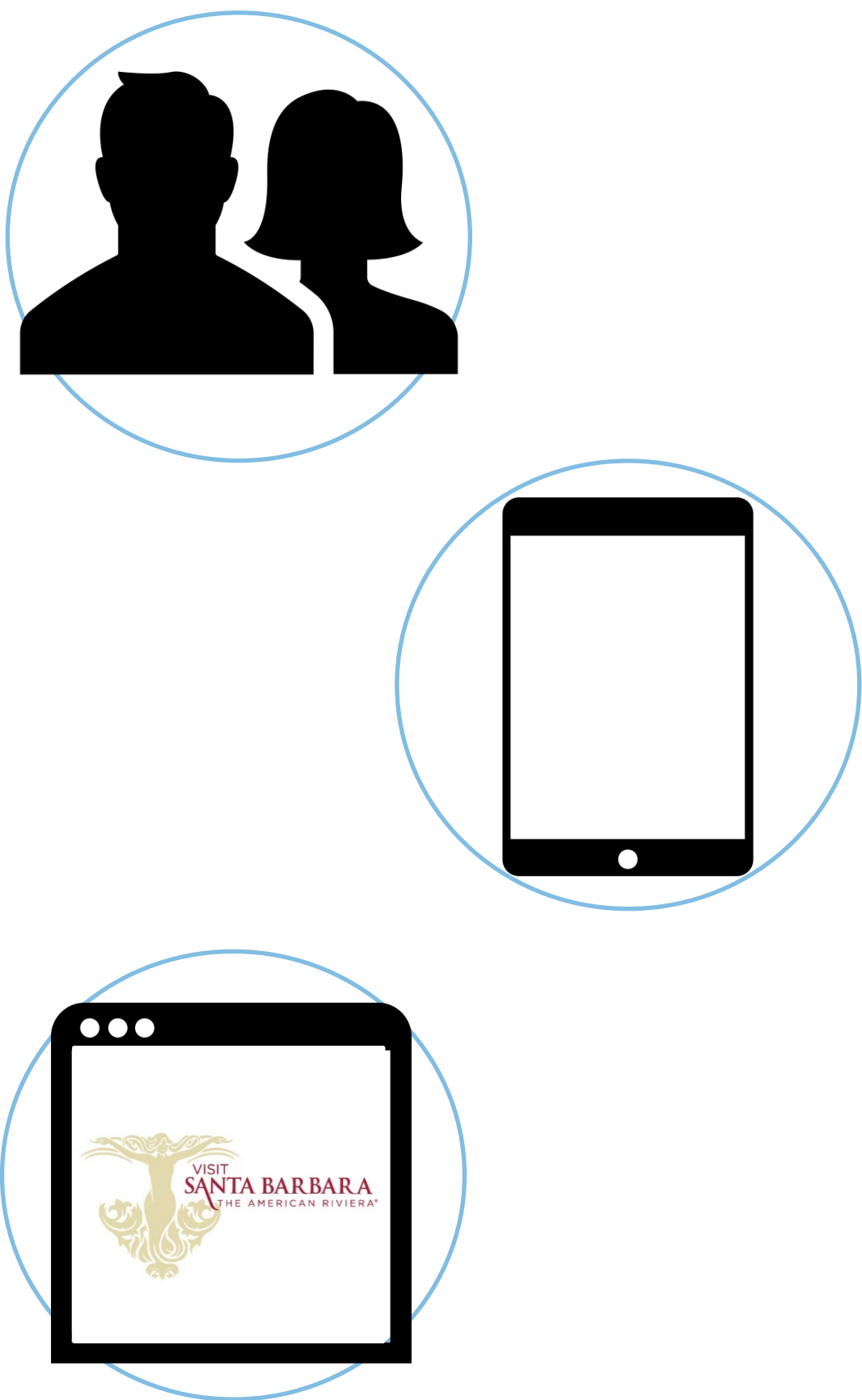
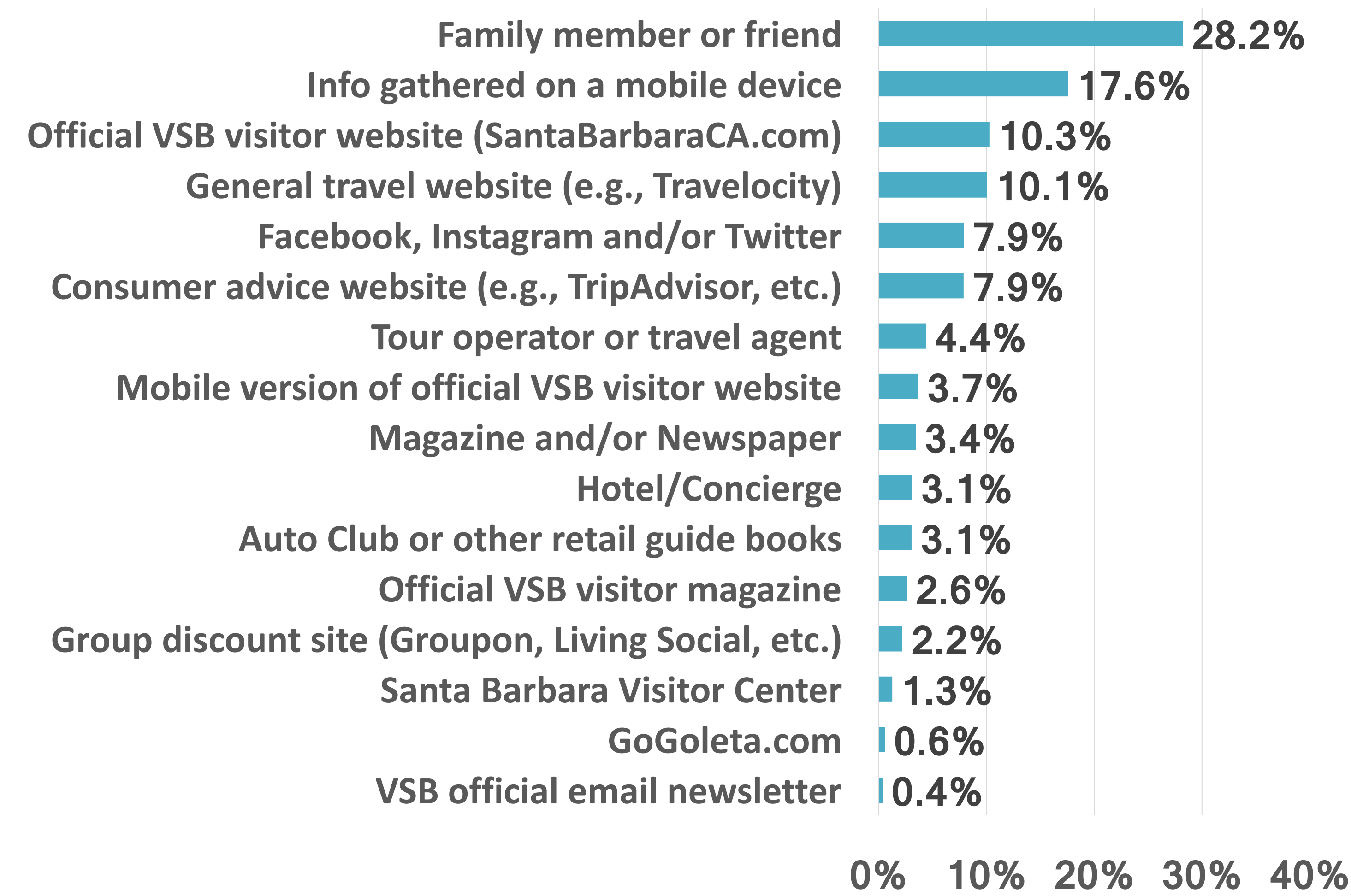
	Hotel Guest	VFR	Day Trip
Downtown /State Street	73.0%	70.6%	58.4%
Stearns Wharf	60.1%	60.5%	50.5%
Santa Barbara Harbor	45.1%	50.0%	41.4%
Santa Barbara Paseo Nuevo	24.0%	34.6%	18.2%
Funk Zone	22.1%	34.2%	17.7%
Old Mission Santa Barbara	29.3%	27.6%	15.7%
Santa Barbara Courthouse	16.4%	14.5%	9.1%
Other historic or architectural sites	9.7%	4.8%	7.7%
UCSB/SBCC	8.7%	22.8%	5.7%
El Presidio de Santa Barbara Historic State Park	8.3%	7.0%	4.2%
Goleta Beach	4.8%	13.2%	2.6%
Goleta Butterfly Grove	2.0%	5.3%	0.7%
Goleta Stow House	0.4%	3.5%	0.9%
Lake Los Carneros	0.7%	3.5%	0.0%
<b>Sample size:</b>	<b>894</b>	<b>228</b>	<b>548</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. 1,780 responses.



# Travel Planning Resources Used Before Arrival



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. 1,769 responses.

# Travel Planning Resources Used Before Arrival – Complete Detail

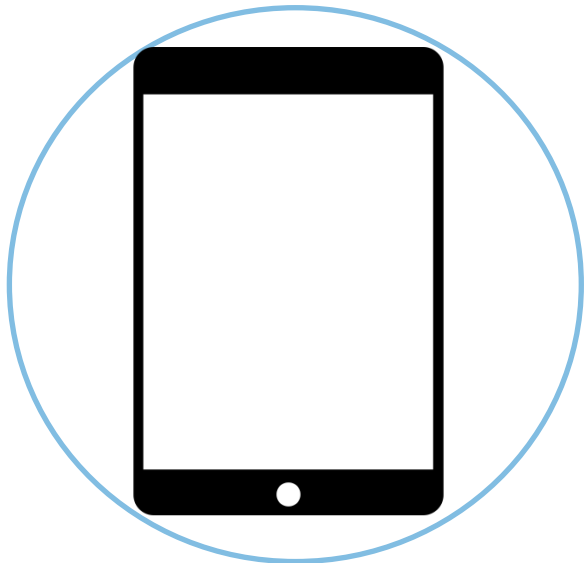
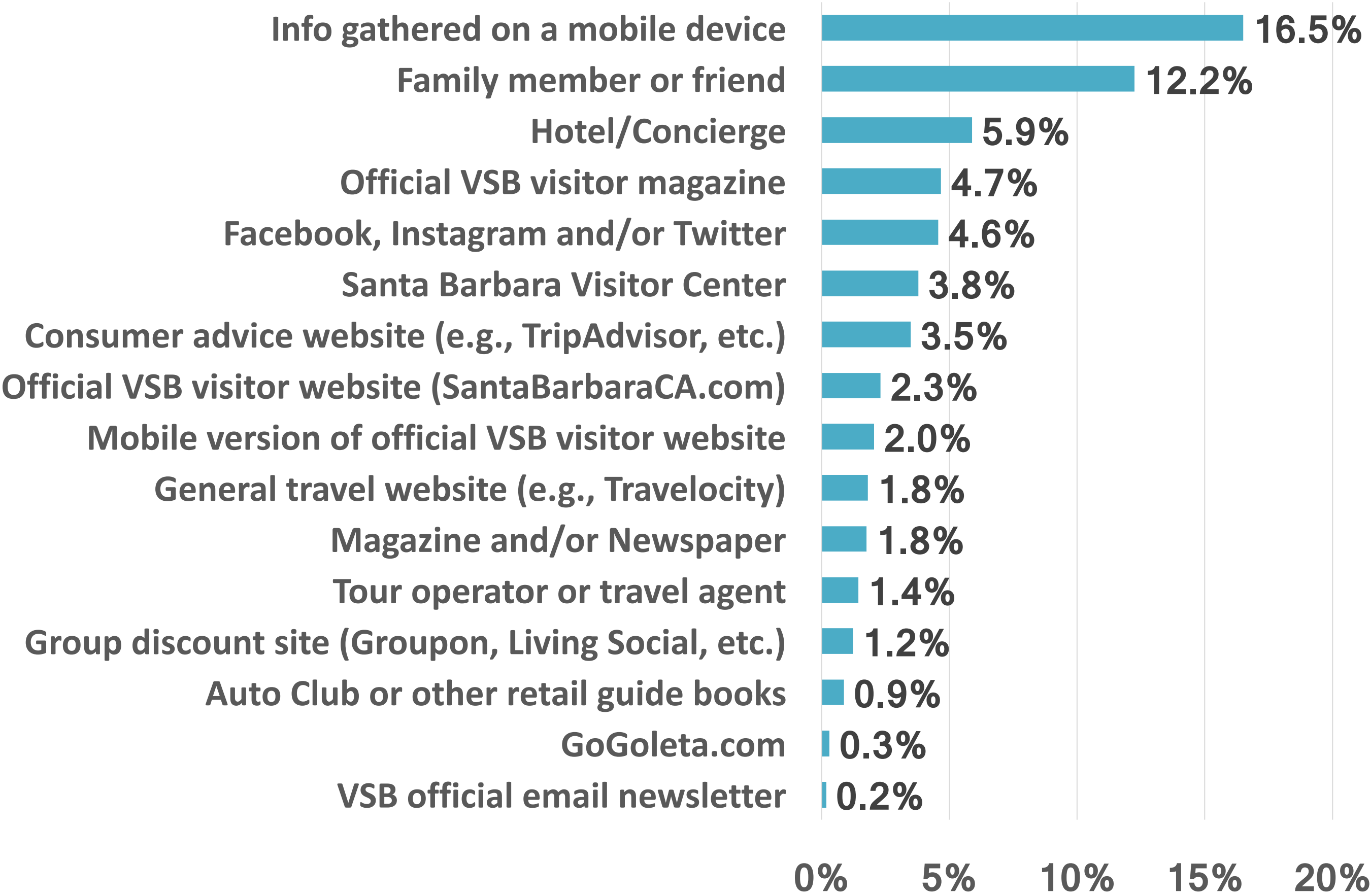
	Hotel Guest	VFR	Day Trip
Family member or friend	23.7%	54.8%	27.5%
Info gathered on a mobile device	17.6%	8.8%	18.1%
Official VSB visitor website (SantaBarbaraCA.com)	16.9%	7.0%	8.3%
General travel website (e.g., Travelocity)	18.8%	7.0%	7.4%
Facebook, Instagram and/or Twitter	7.9%	12.3%	7.4%
Consumer advice website (e.g., TripAdvisor, etc.)	17.2%	5.3%	4.8%
Tour operator or travel agent	4.4%	1.8%	4.6%
Mobile version of official VSB visitor website	4.6%	0.9%	3.5%
Magazine and/or Newspaper	5.1%	1.8%	3.0%
Hotel/Concierge	8.3%	0.0%	1.7%
Auto Club or other retail guide books	6.3%	0.9%	2.0%
Official VSB visitor magazine	4.3%	2.2%	2.0%
Group discount site (Groupon, Living Social, etc.)	3.1%	1.8%	1.8%
Santa Barbara Visitor Center	1.7%	0.4%	1.1%
GoGoleta.com	1.3%	0.0%	0.4%
VSB official email newsletter	0.4%	0.0%	0.4%
<b>Sample size:</b>	<b>890</b>	<b>228</b>	<b>541</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. 1,769 responses.



# Travel Planning Resources Used In-Market



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. 1,769 responses.

# Travel Planning Resources Used In-Market – Complete Detail

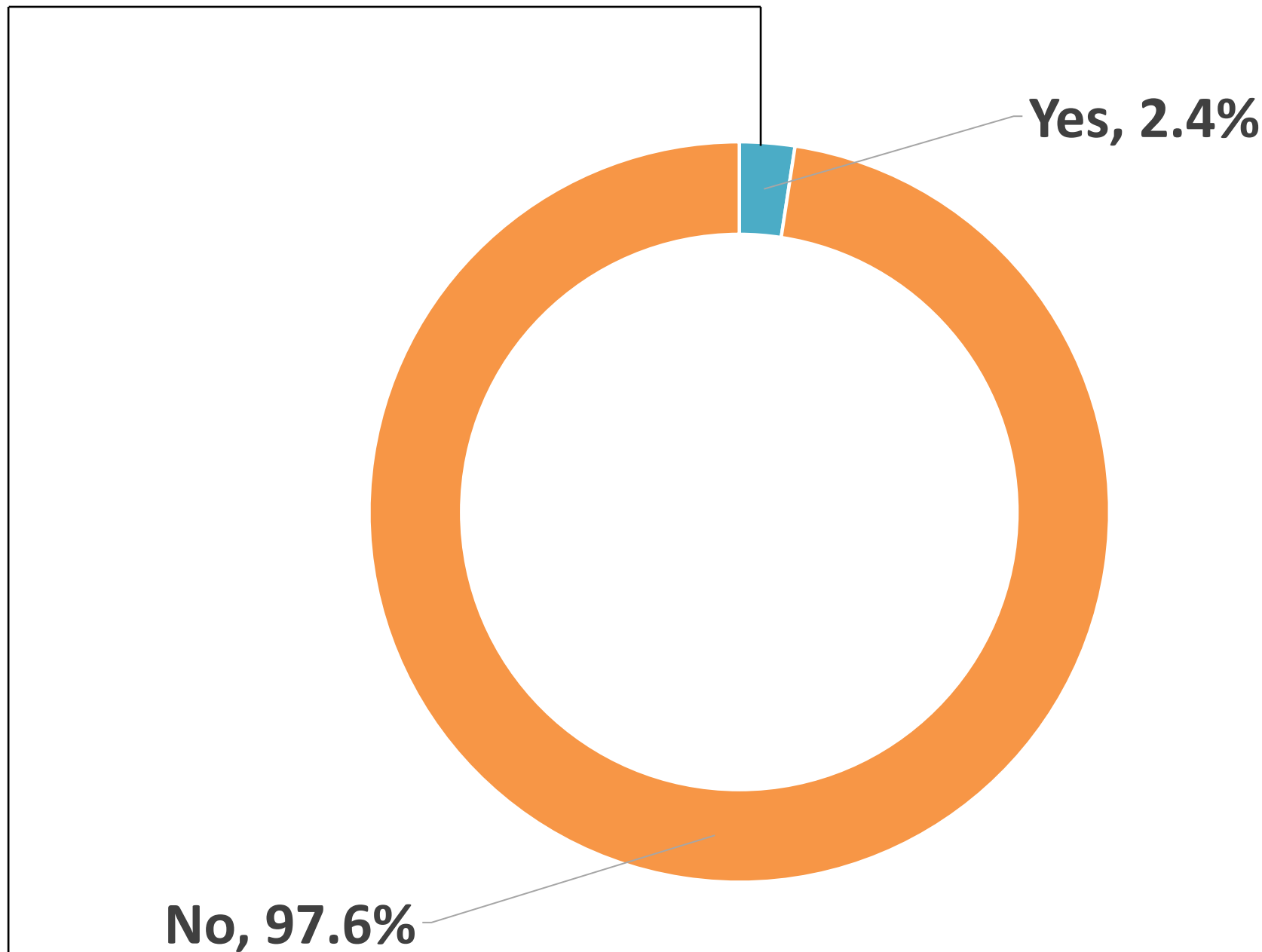
	Hotel Guest	VFR	Day Trip
Info gathered on a mobile device	16.9%	12.3%	16.6%
Family member or friend	12.5%	29.4%	10.5%
Hotel/Concierge	21.2%	0.9%	1.1%
Official VSB visitor magazine	16.0%	1.3%	1.1%
Facebook, Instagram and/or Twitter	7.1%	10.1%	3.1%
Santa Barbara Visitor Center	4.0%	1.3%	3.9%
Consumer advice website (e.g., TripAdvisor, etc.)	6.1%	6.1%	2.2%
Official VSB visitor website (SantaBarbaraCA.com)	5.8%	1.8%	1.1%
Mobile version of official VSB visitor website	5.4%	1.3%	0.9%
General travel website (e.g., Travelocity)	3.8%	1.8%	1.1%
Magazine and/or Newspaper	4.7%	1.8%	0.7%
Tour operator or travel agent	2.0%	0.9%	1.3%
Group discount site (Groupon, etc.)	1.9%	1.8%	0.9%
Auto Club or other retail guide books	1.2%	1.8%	0.6%
GoGoleta.com	0.2%	0.0%	0.4%
VSB official email newsletter	0.1%	0.4%	0.2%
<b>Sample size:</b>	<b>890</b>	<b>228</b>	<b>541</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. 1,769 responses.



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



**Mean # of nights this group increased their stay in Santa Barbara = 2.4**

**Mean # of days SB trip was extended**

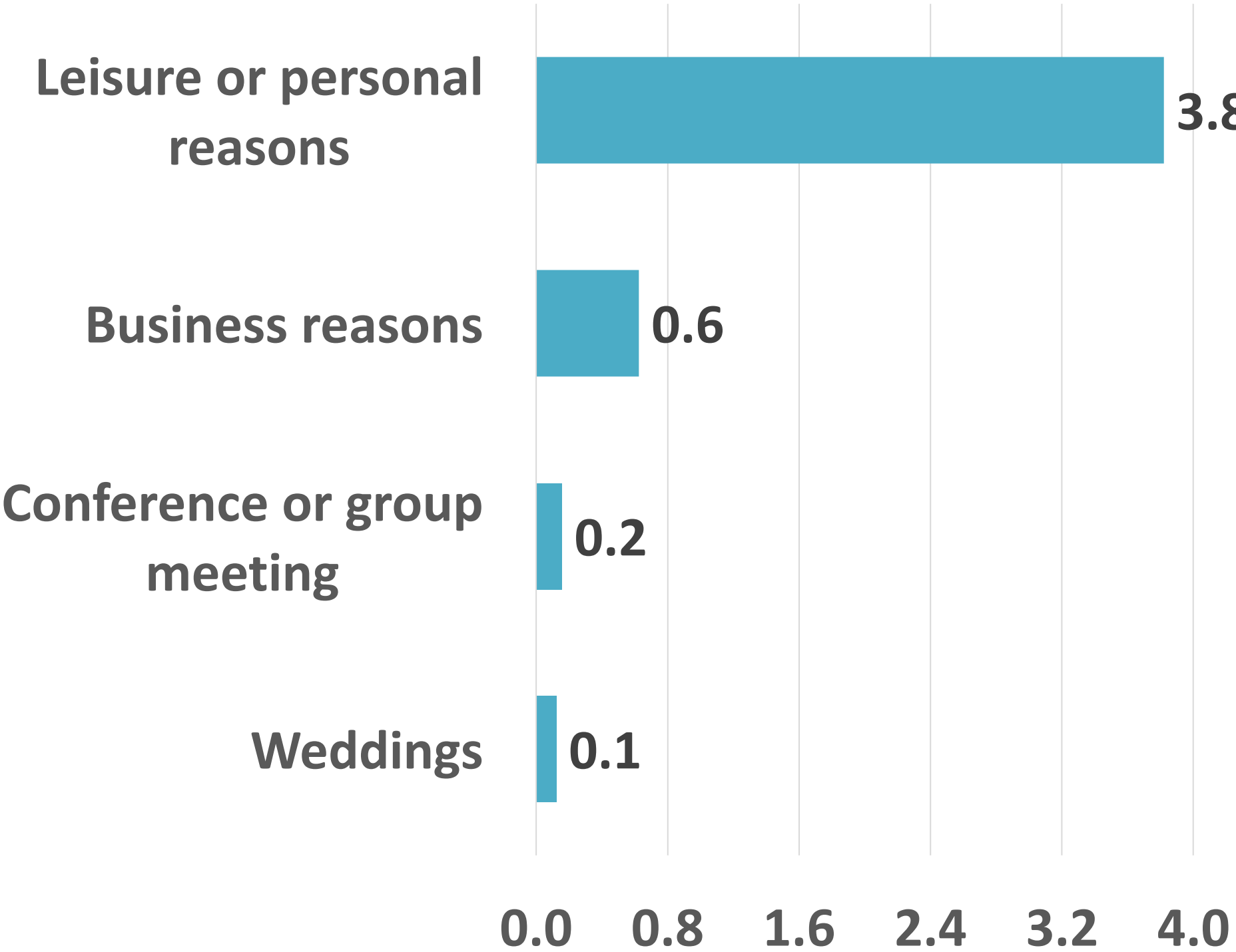
**Sample size:**

	Hotel Guest	VFR	Day Trip
Yes	3.5%	2.7%	2.0%
No	96.5%	97.3%	98.0%
	1.9	2.3	1.1
	425	187	444

Questions: 1. Did any information you accessed while in the area cause you to extend your stay in the Santa Barbara South Coast? Base: All respondents. 1,153 responses.  
2. If YES (above), by how many nights? Base: Respondents who extended their stay in response to information accessed in the destination. 30 responses.

# Number of Visits to the Santa Barbara Area in the Past 12 Months

## (Intercept Survey)

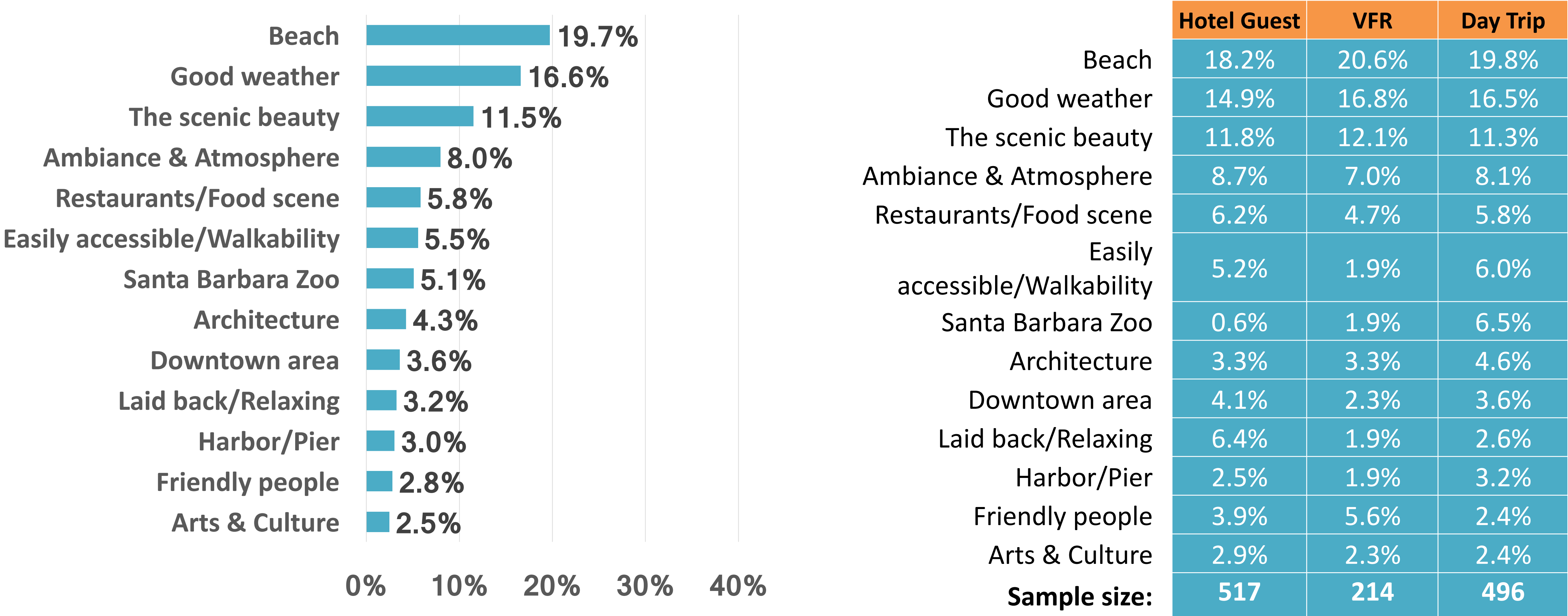


	Hotel Guest	VFR	Day Trip
Leisure or personal reasons	1.4	3.6	4.4
Business reasons	0.3	0.5	0.7
Conference or group meeting	0.1	0.2	0.2
Weddings	0.1	0.3	0.1
Mean # of trips	1.9	4.5	5.4
Sample size:	353	169	352

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? Base: All respondents. 934 responses.



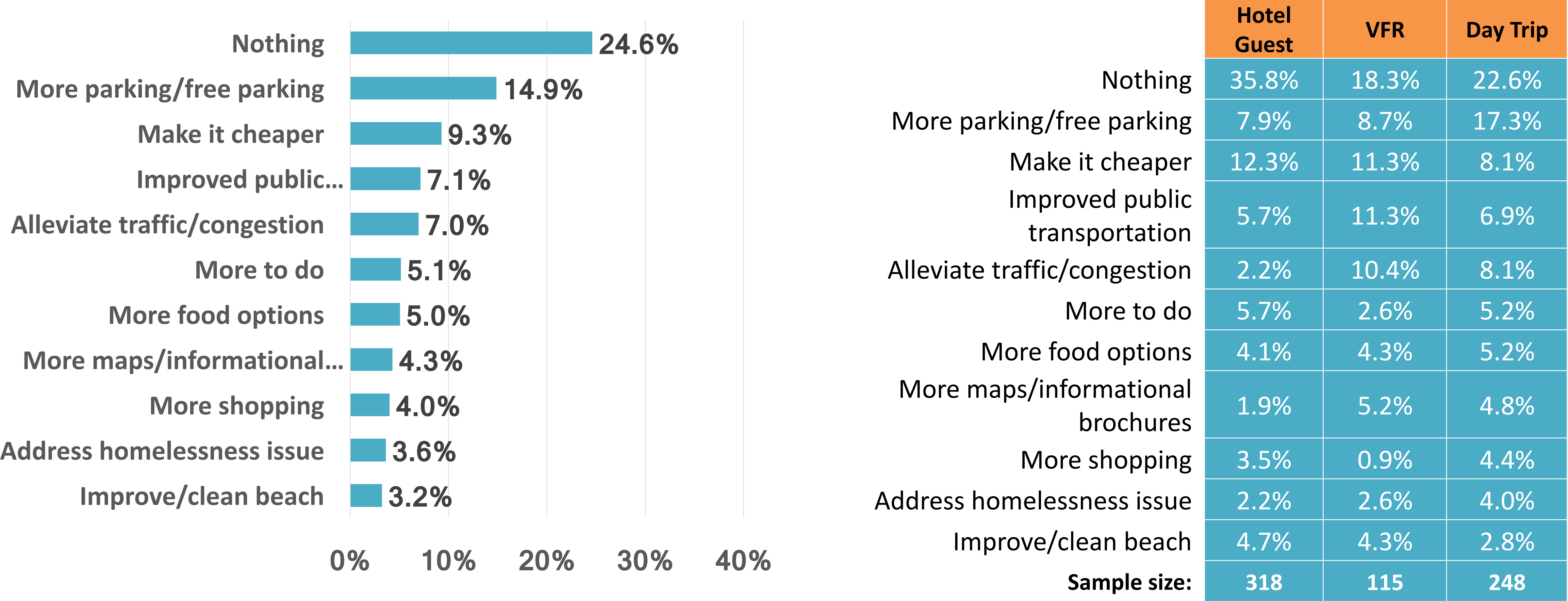
# Most Liked Aspects of the Santa Barbara Area (Intercept Survey)



Question: What aspects of your experience in the Santa Barbara area did you like best? Base: All respondents. 1,325 responses.

# Attractions/Services that Would Enhance the Santa Barbara Experience

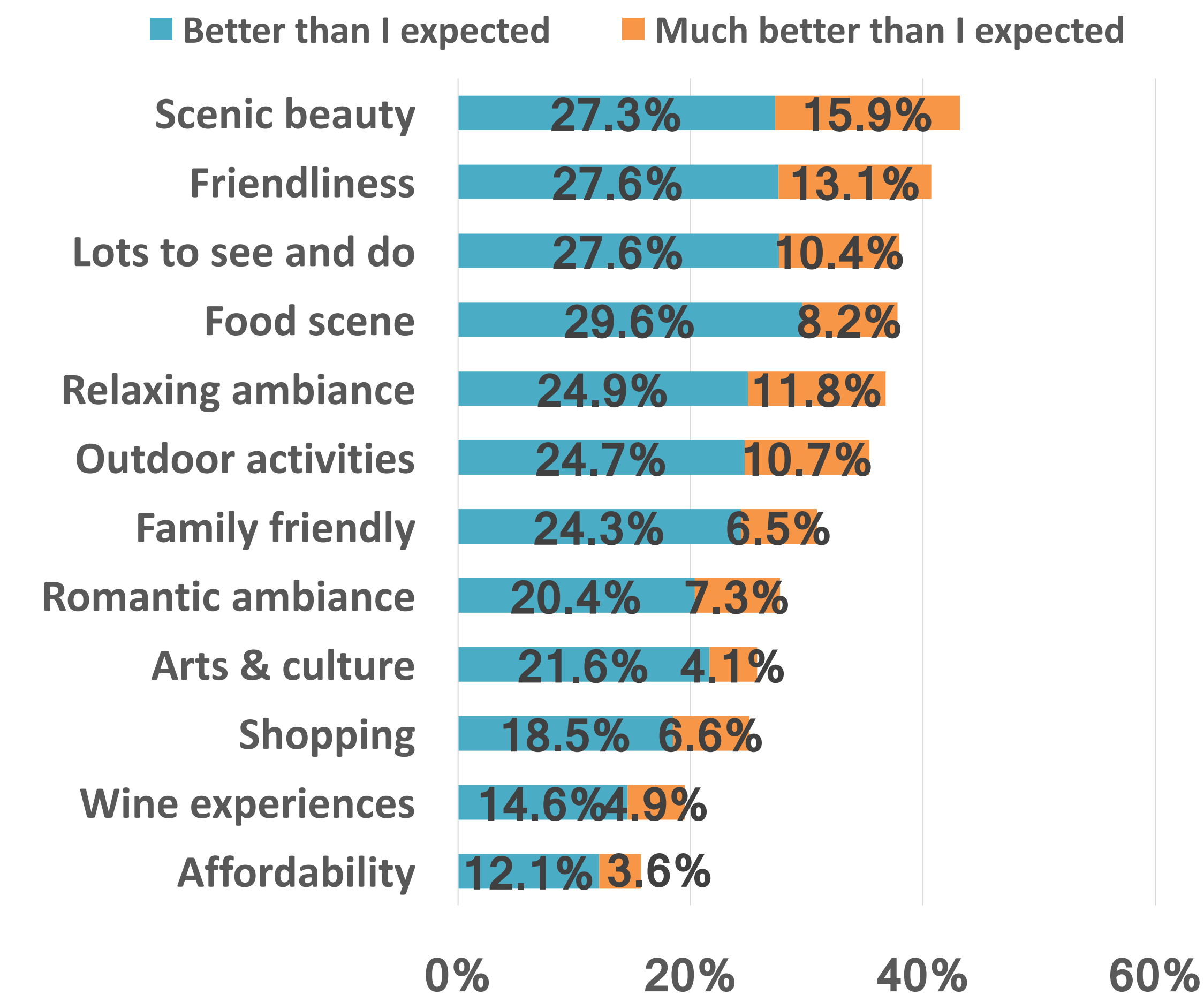
## (Intercept Survey)



Question: In your opinion, what attractions or services would have most enhanced your experience in the Santa Barbara South Coast? Base: All respondents. 728 responses.



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

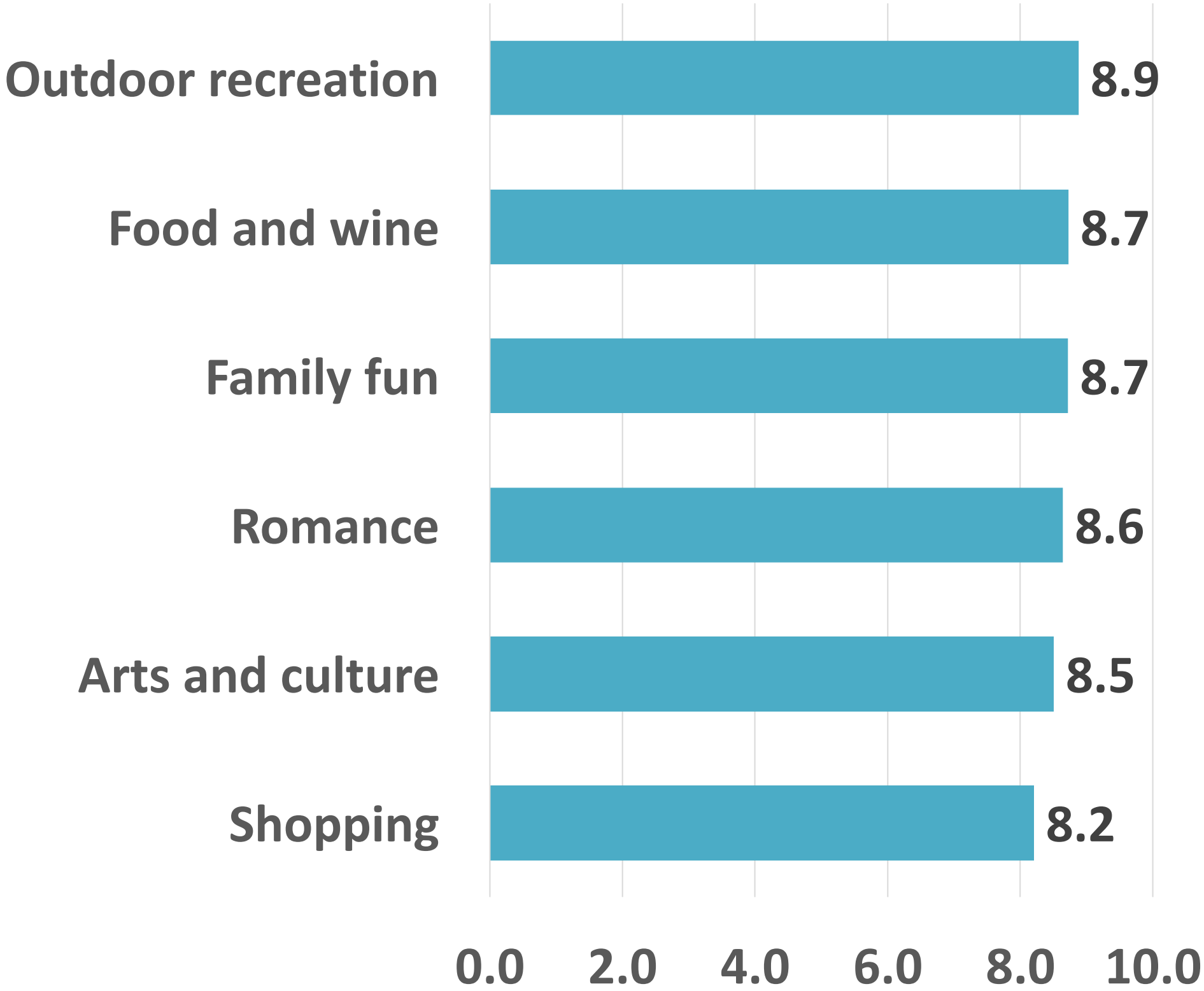


Top 2 box score (Better than & Much better than expected)

	Hotel Guest	VFR	Day Trip
Scenic beauty	49.6%	57.0%	39.7%
Friendliness	43.9%	47.5%	38.8%
Lots to see and do	40.4%	49.3%	36.1%
Food scene	39.3%	48.9%	36.3%
Relaxing ambiance	41.5%	47.1%	34.2%
Outdoor activities	37.7%	48.4%	33.4%
Family friendly	27.4%	50.2%	30.7%
Romantic ambiance	31.3%	41.7%	25.3%
Arts & culture	27.3%	39.9%	24.2%
Shopping	23.6%	33.2%	25.0%
Wine experiences	21.8%	30.5%	17.9%
Affordability	16.9%	17.5%	15.4%
Sample size:	857	223	521

Question: Thinking about your experience on this trip, how did Santa Barbara South Coast compare to what you expected before arriving? Base: All respondents. 1,705 responses.

# Visitor Experience Ratings (Intercept Survey)

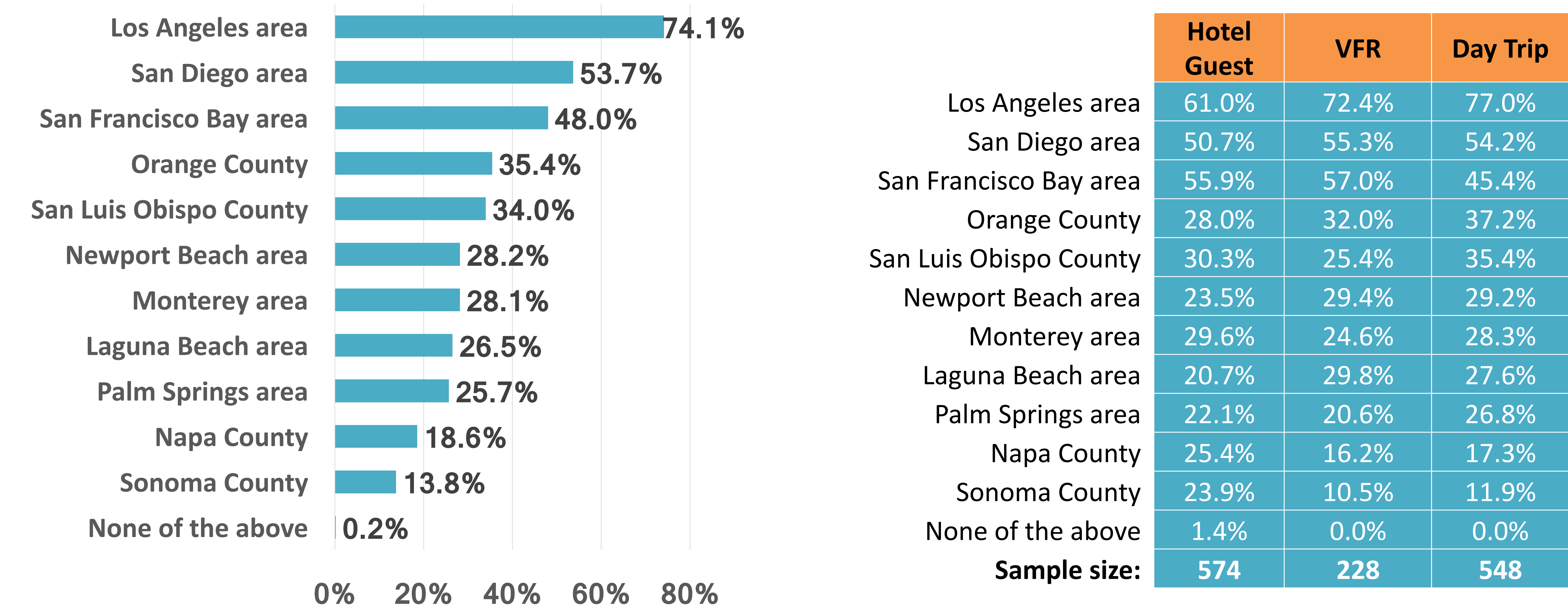


	Hotel Guest	VFR	Day Trip
Outdoor recreation	8.8	9.1	8.9
Food and wine	8.6	8.7	8.8
Family fun	8.5	8.8	8.8
Romance	8.7	8.5	8.6
Arts and culture	8.3	8.5	8.5
Shopping	8.0	8.2	8.3
Sample size:	544	219	508

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. Base: All respondents. 1,375 responses.



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



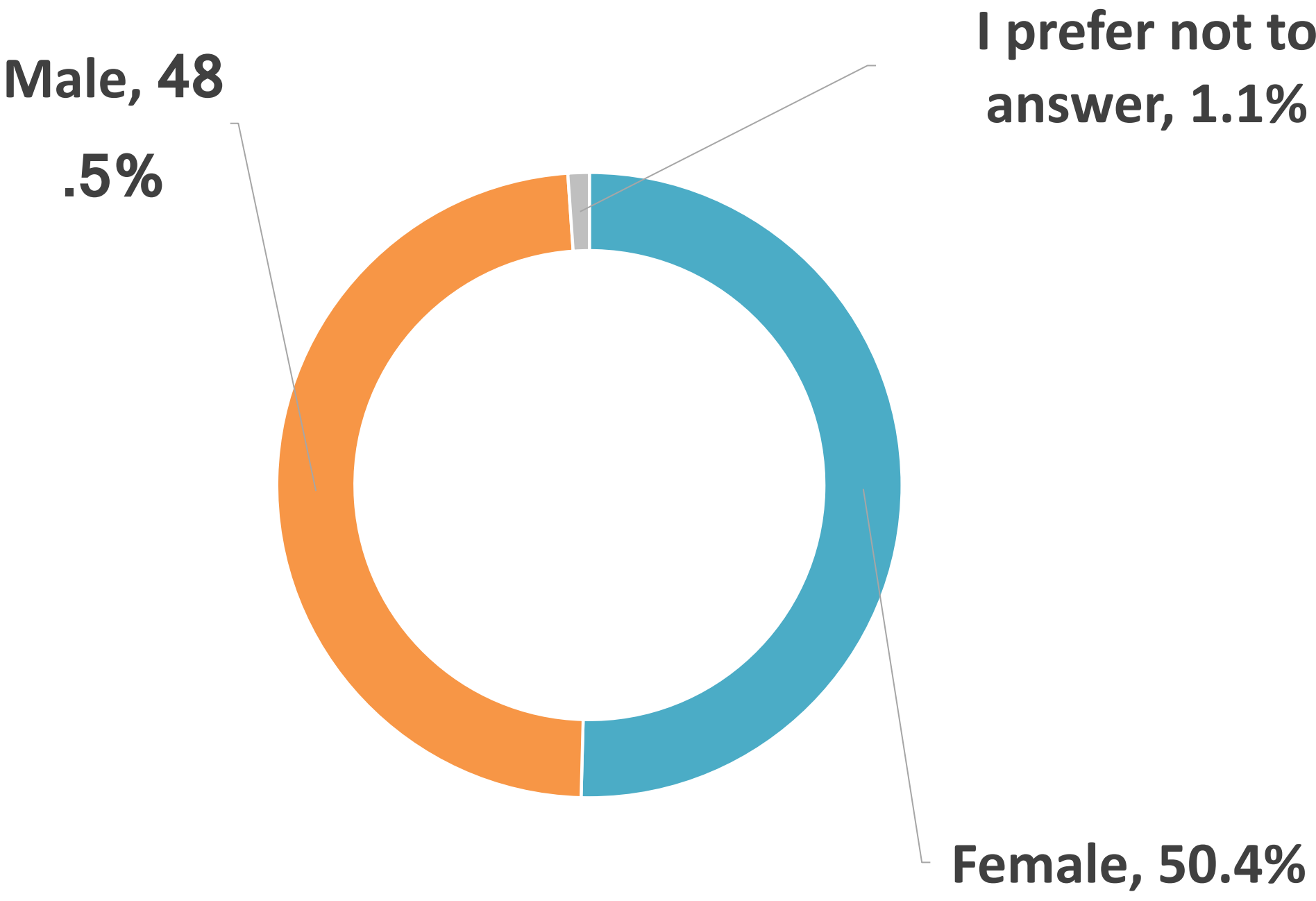
Question: Which of the following destinations have you visited for leisure in the past two (2) years? (Select all that apply) Base: All respondents. 1,460 responses.

The background image shows a historic building with a red-tiled roof and a small dome. Palm trees are visible in the foreground and background. The image is slightly faded to allow the text to be read clearly.

# VISITOR DEMOGRAPHICS



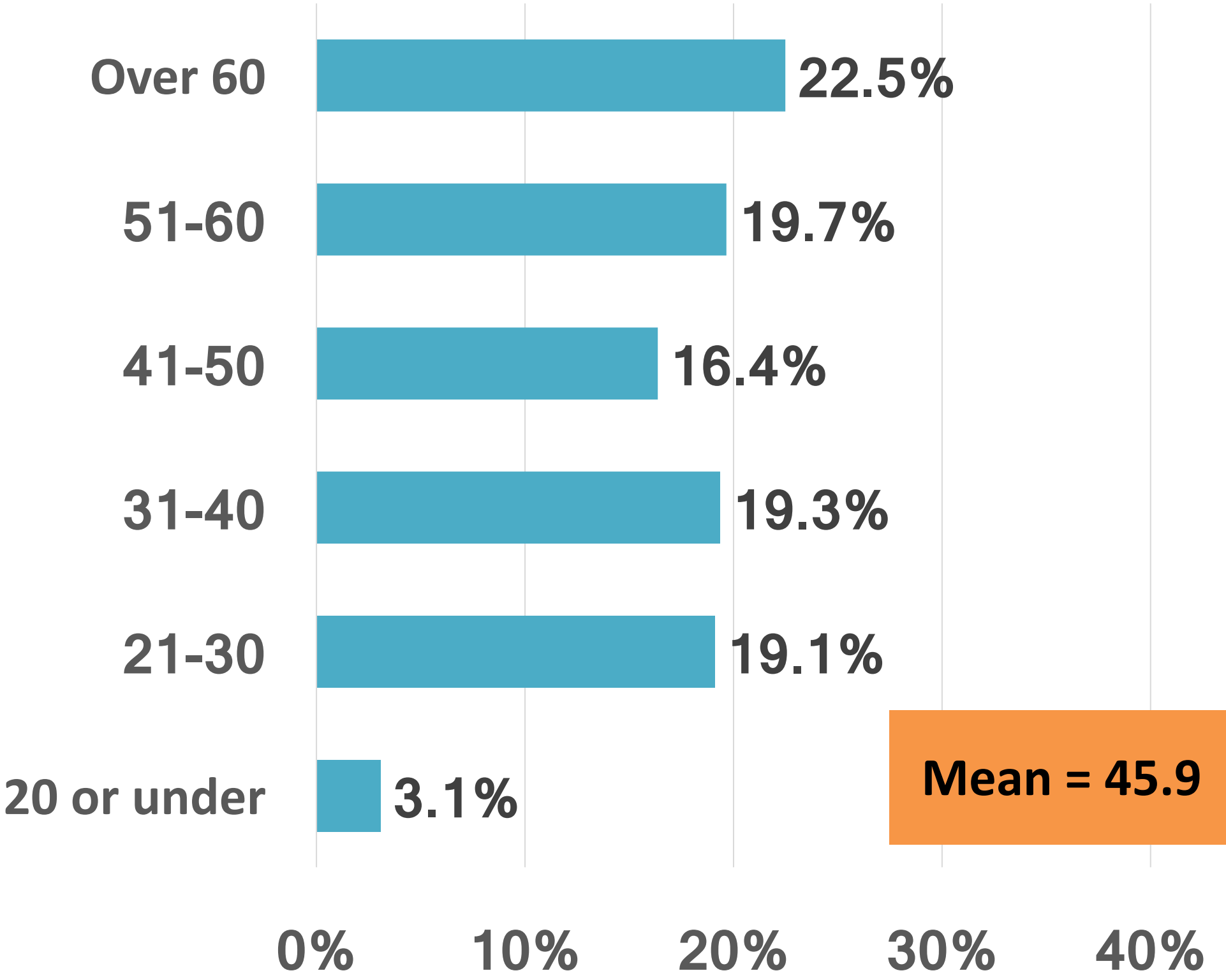
# Gender



	Hotel Guest	VFR	Day Trip
Female	54.7%	49.0%	49.4%
Male	44.6%	48.0%	49.6%
I prefer not to answer	0.7%	3.0%	1.1%
Sample size:	834	198	470

Question: What is your gender? Base: All respondents. 1,597 responses.

# Age

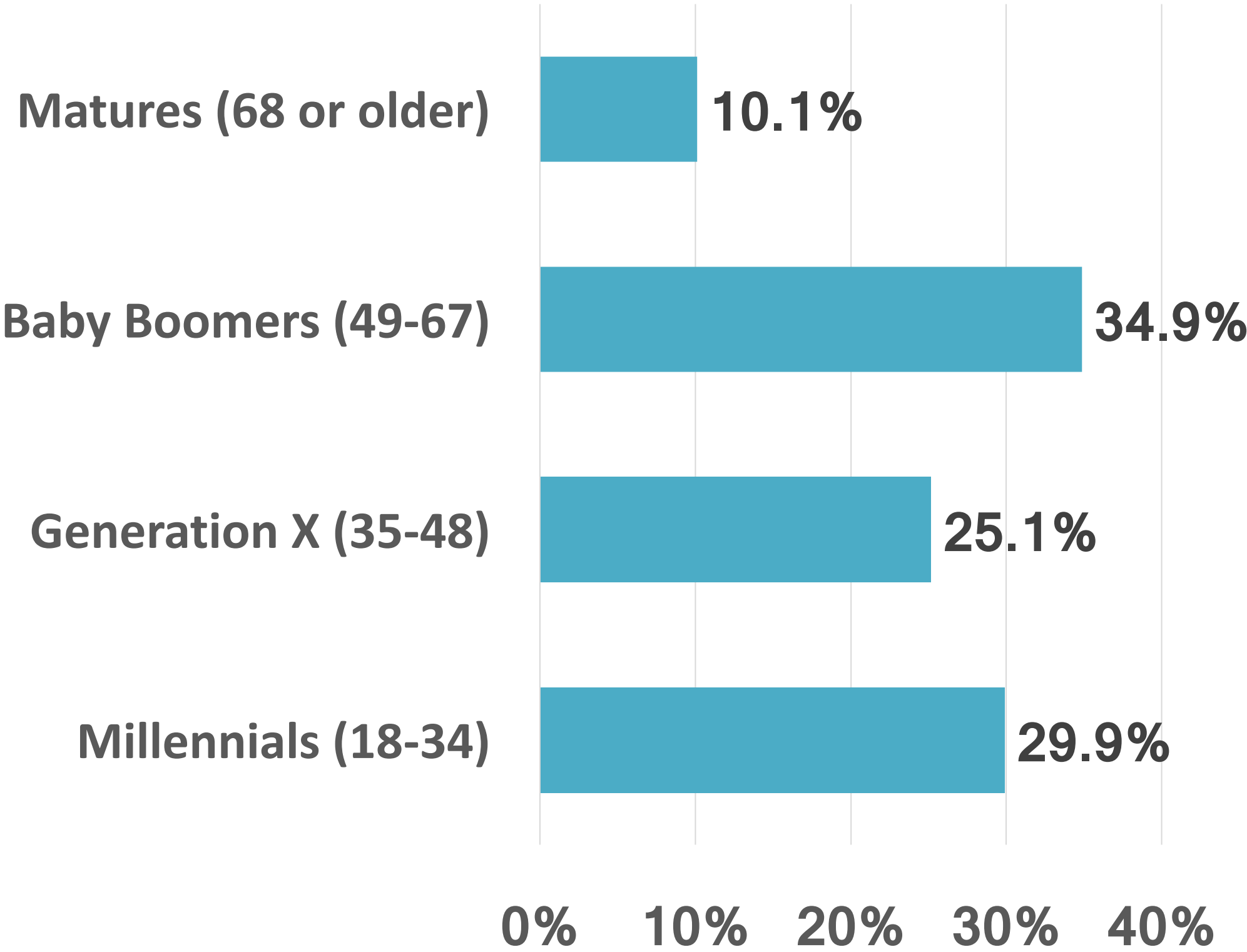


	Hotel Guest	VFR	Day Trip
Over 60	33.1%	15.6%	19.3%
51-60	23.4%	11.7%	19.3%
41-50	13.1%	10.6%	18.0%
31-40	15.0%	15.1%	21.5%
21-30	14.6%	35.8%	18.8%
20 or under	0.7%	11.2%	3.2%
Mean	51.0	38.1	44.8
Sample size:	725	179	410

Question: Which is your age? Base: All respondents. 1,399 responses.



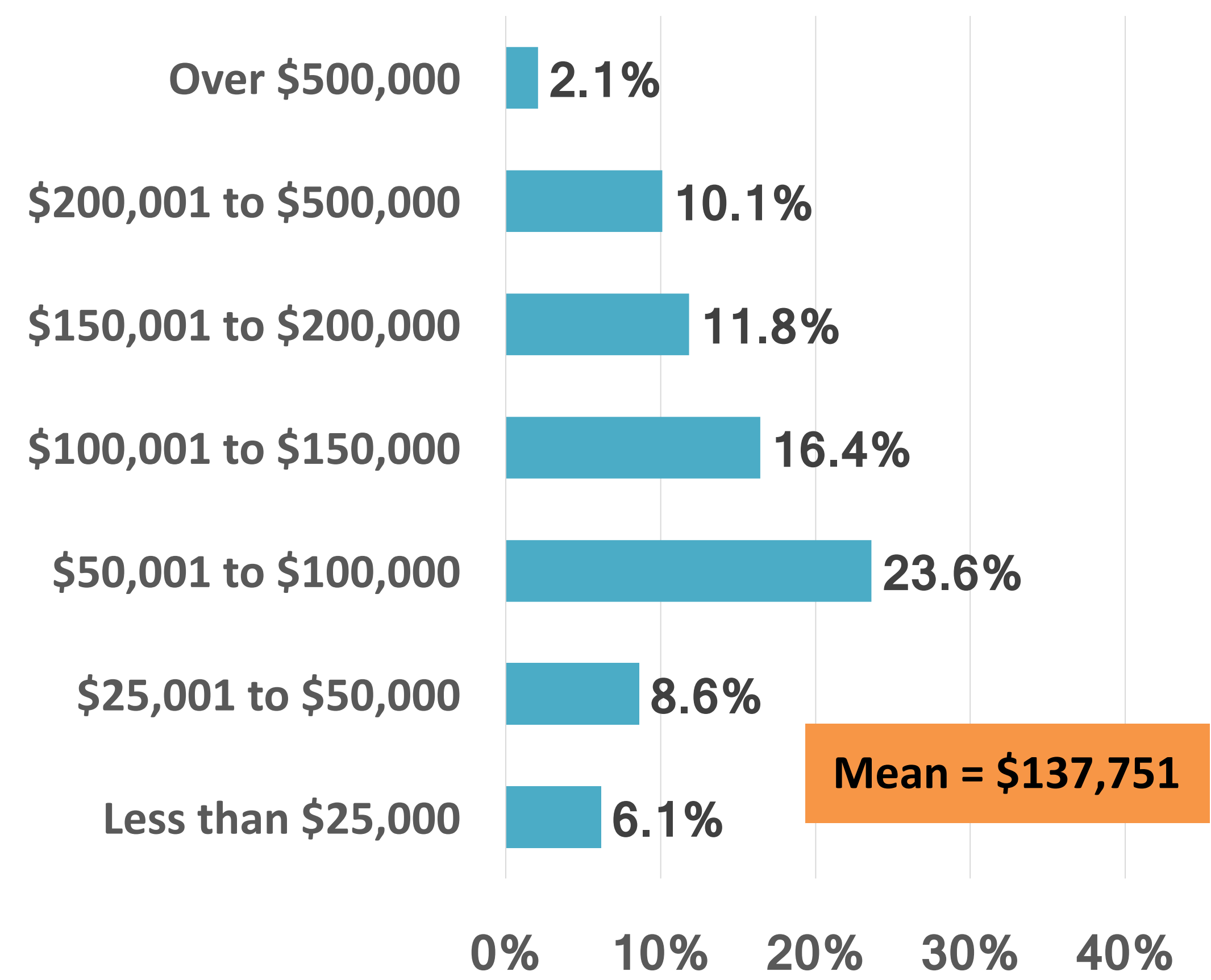
# Age – Generations Breakout



	Hotel Guest	VFR	Day Trip
Matures (68 or more)	15.9%	5.0%	8.5%
Baby Boomers (49-67)	44.1%	23.5%	32.7%
Generation X (35-48)	16.7%	19.0%	29.0%
Millennials (18-34)	23.3%	52.5%	29.8%
Sample size:	725	179	410

Question: Which is your age? Base: All respondents. 1,399 responses.

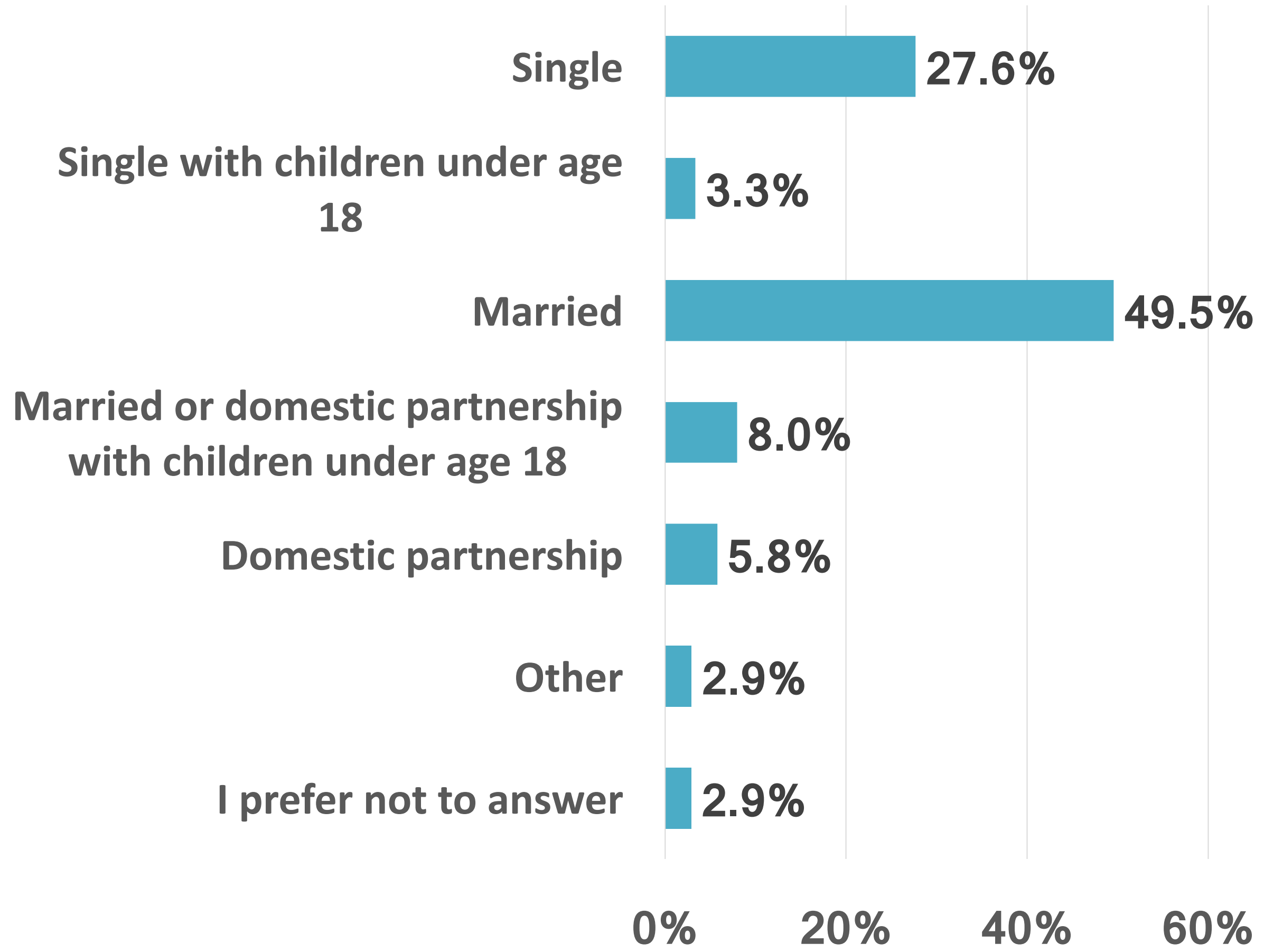
# Annual Household Income



	Hotel Guest	VFR	Day Trip
Over \$500,000	2.8%	4.6%	1.6%
\$200,001 to \$500,000	16.9%	7.7%	7.6%
\$150,001 to \$200,000	10.4%	9.3%	12.7%
\$100,001 to \$150,000	17.1%	11.9%	16.5%
\$50,001 to \$100,000	19.4%	20.1%	25.9%
\$25,001 to \$50,000	7.4%	13.4%	8.5%
Less than \$25,000	3.4%	13.4%	6.5%
I prefer not to answer	22.6%	19.6%	20.8%
Mean	\$167,790	\$128,206	\$127,078
Sample size:	824	194	448

Question: Which of the following best describes the combined annual income of all members of your household? Base: All respondents. 1,559 responses.

# Marital Status

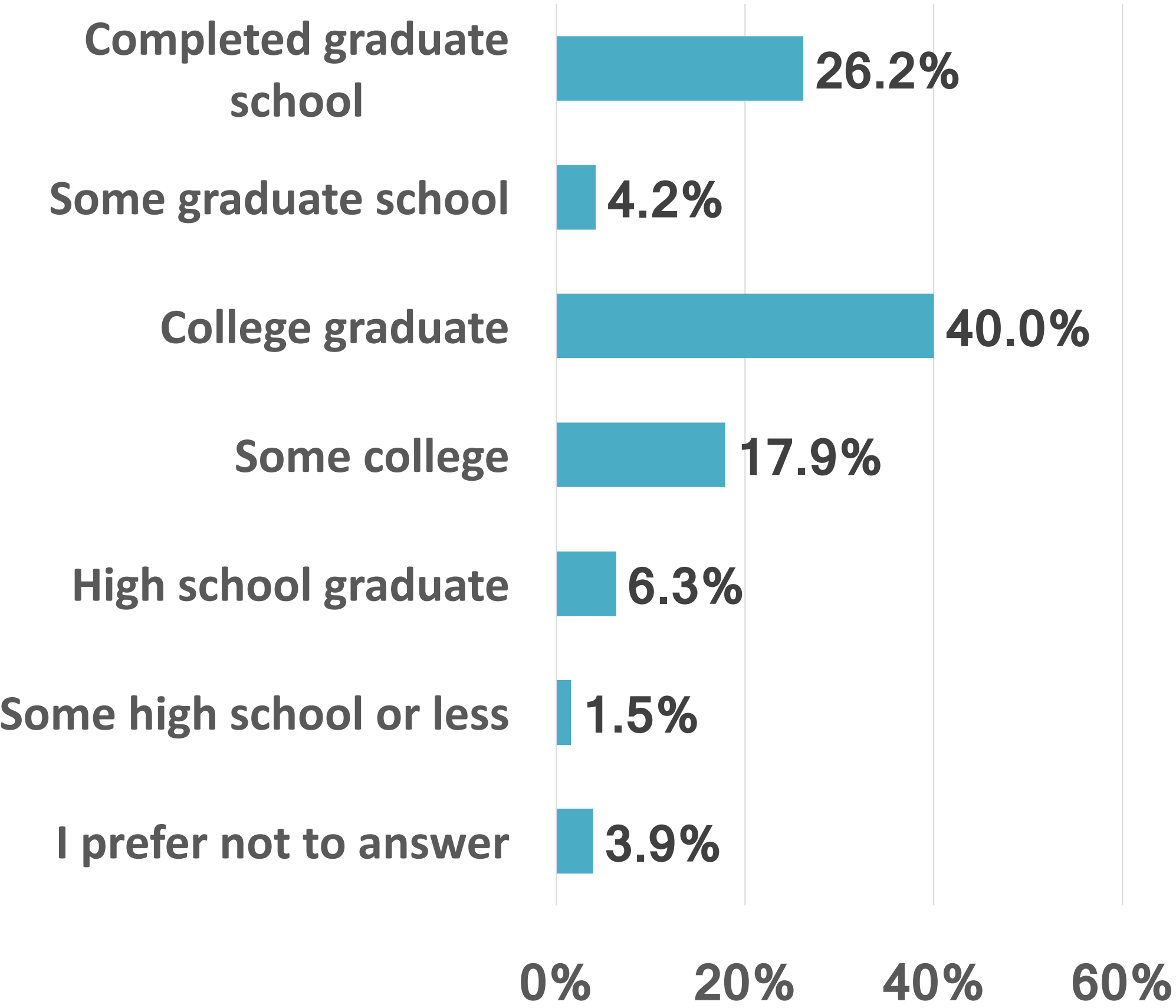


	Hotel Guest	VFR	Day Trip
Single	22.2%	49.7%	27.7%
Single with children under age 18	1.8%	2.6%	3.9%
Married	58.8%	29.0%	48.0%
Married or domestic partnership with children under age 18	6.3%	2.6%	9.0%
Domestic partnership	3.7%	6.7%	6.5%
Other	2.1%	5.2%	3.0%
I prefer not to answer	5.0%	4.1%	1.9%
Sample size:	838	193	465

Question: Which of the following best describes your current marital status? Base: All respondents. 1,588 responses.



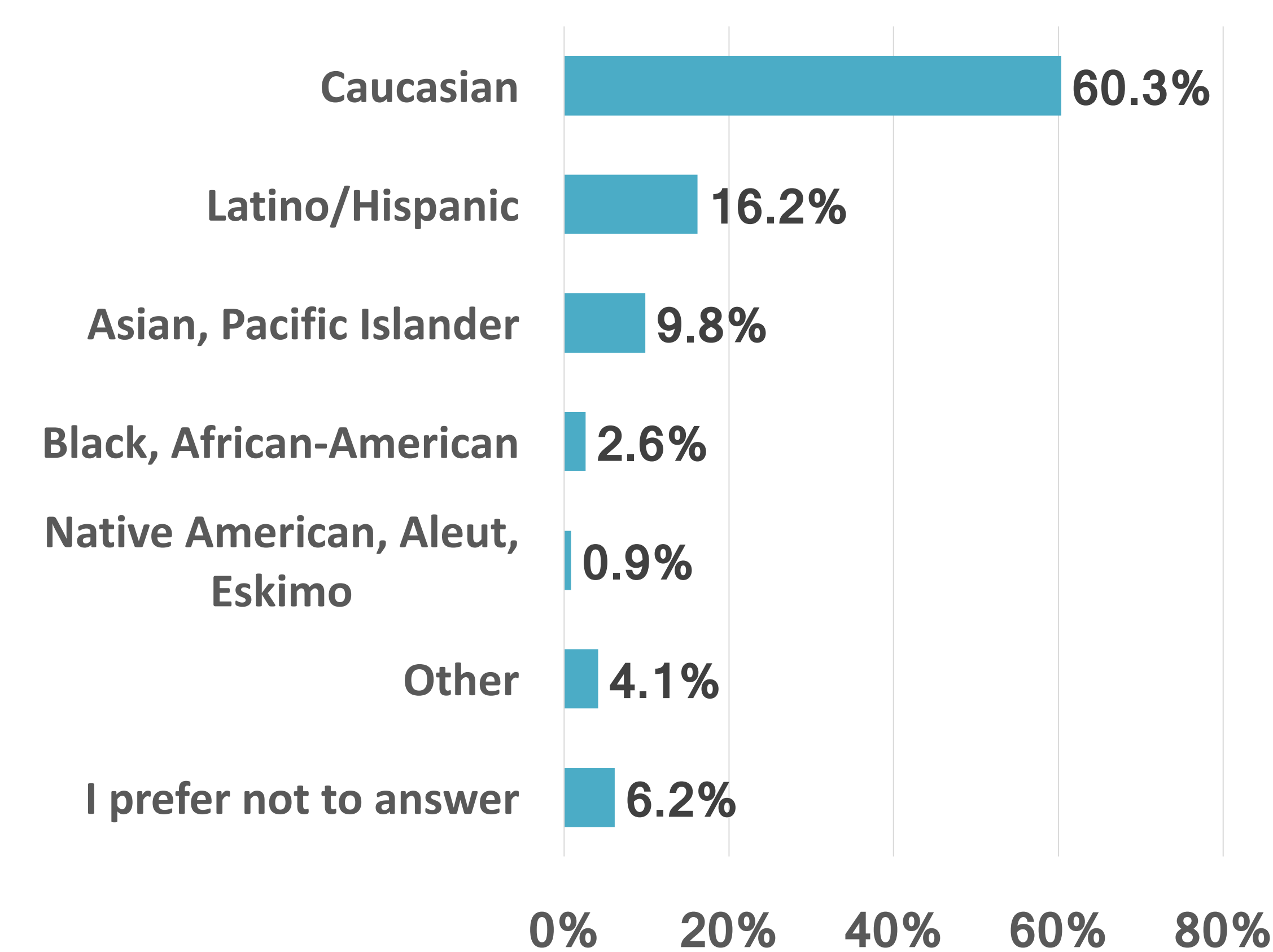
# Education



	Hotel Guest	VFR	Day Trip
Completed graduate school	33.8%	17.8%	24.0%
Some graduate school	6.9%	3.0%	3.1%
College graduate	37.0%	39.1%	41.2%
Some college	12.8%	28.9%	19.0%
High school graduate	3.5%	5.6%	7.6%
Some high school or less	1.0%	1.5%	1.7%
I prefer not to answer	5.0%	4.1%	3.5%
Sample size:	837	197	459

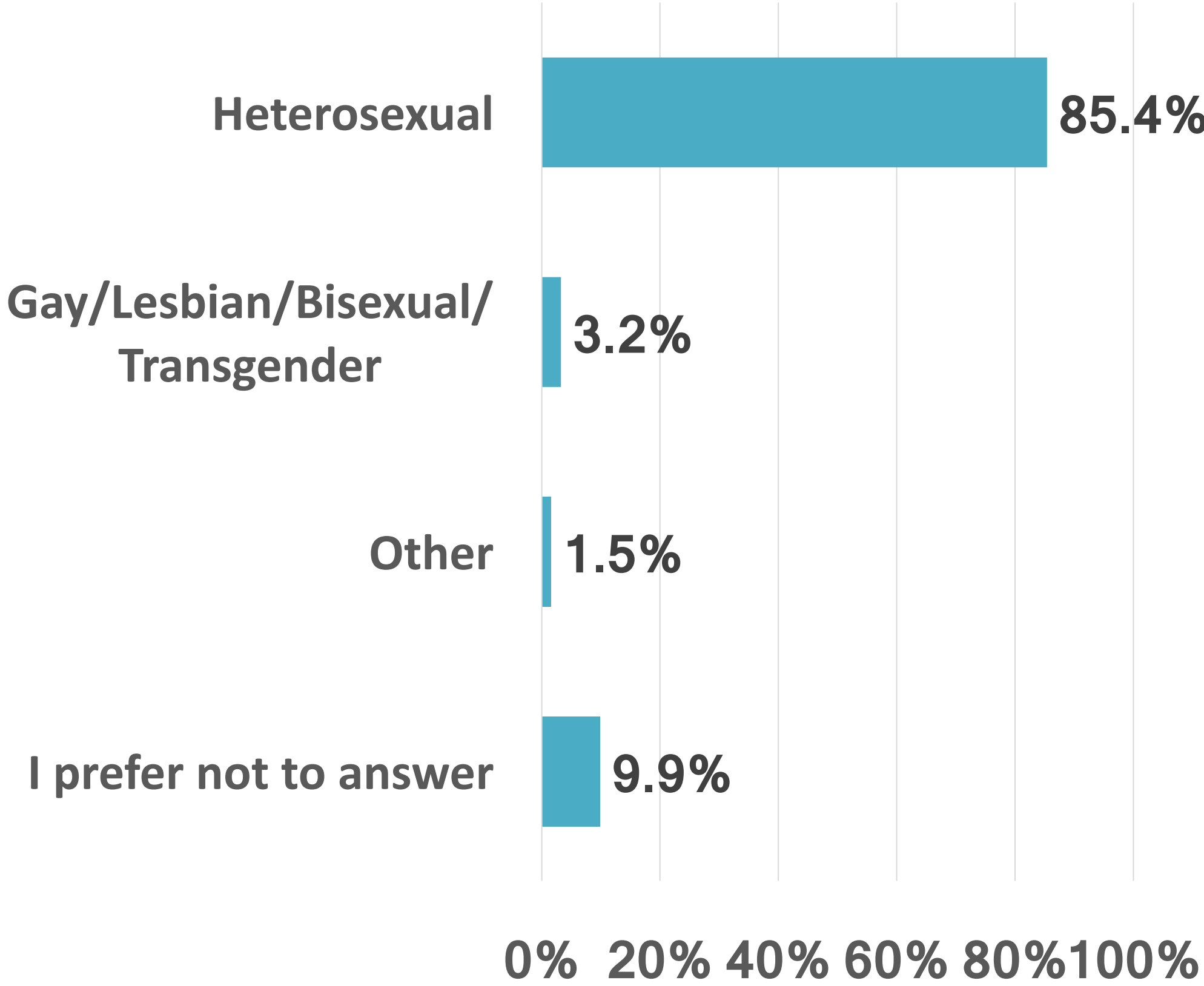
Question: What is your highest level of formal education? (Select one) Base: All respondents. 1,586 responses.

# Ethnicity



	Hotel Guest	VFR	Day Trip
Caucasian	69.1%	56.9%	57.2%
Latino/Hispanic	8.8%	18.8%	18.7%
Asian, Pacific Islander	7.9%	10.7%	10.4%
Black, African-American	2.0%	5.1%	2.6%
Native American, Aleut, Eskimo	1.0%	0.5%	0.9%
Other	3.7%	3.6%	4.3%
I prefer not to answer	7.6%	4.6%	5.9%
Sample size:	834	197	460

Question: Which best describes your ethnicity? Base: All respondents. 1,583 responses.



	Hotel Guest	VFR	Day Trip
Heterosexual	86.1%	79.4%	85.6%
Gay/Lesbian/Bisexual/Transgender	2.5%	11.3%	2.7%
Other	2.5%	1.0%	1.3%
I prefer not to answer	8.9%	8.2%	10.3%
Sample size:	359	194	445

Question: Which best describes you? (Select one) Base: All respondents.  
1,089 responses.

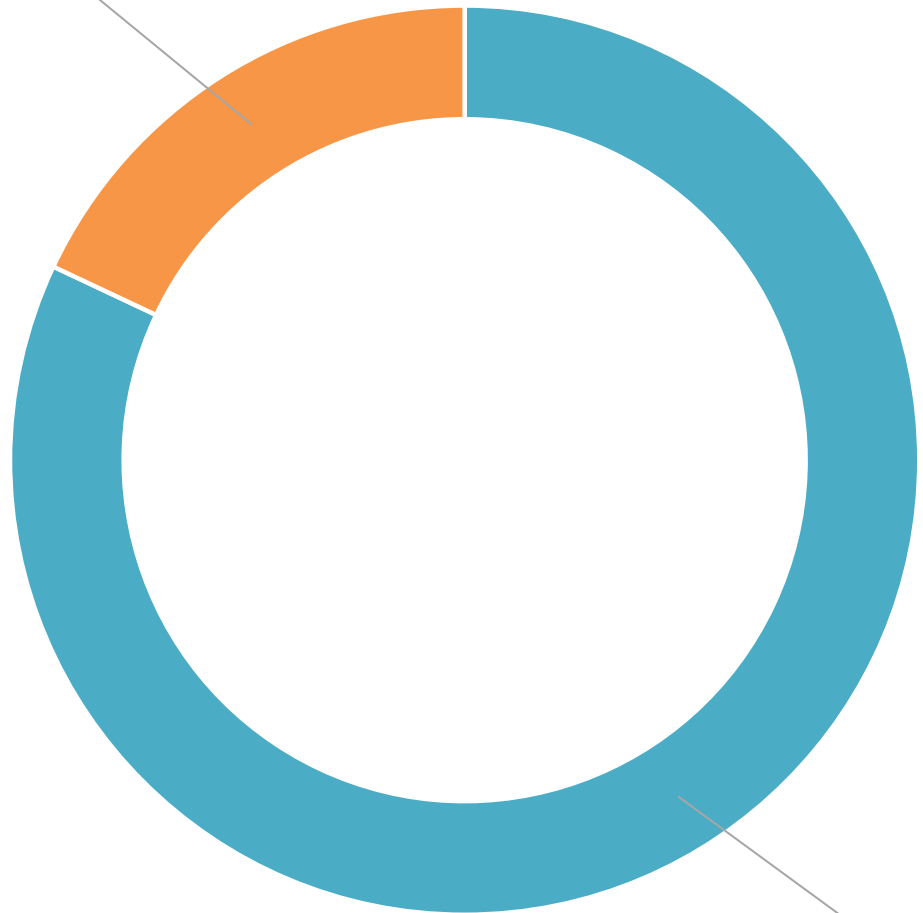


The background image shows a Spanish-style building with a red-tiled roof and a small dome. Palm trees are visible in the foreground and background. The text "POINT OF ORIGIN" is overlaid in the center.

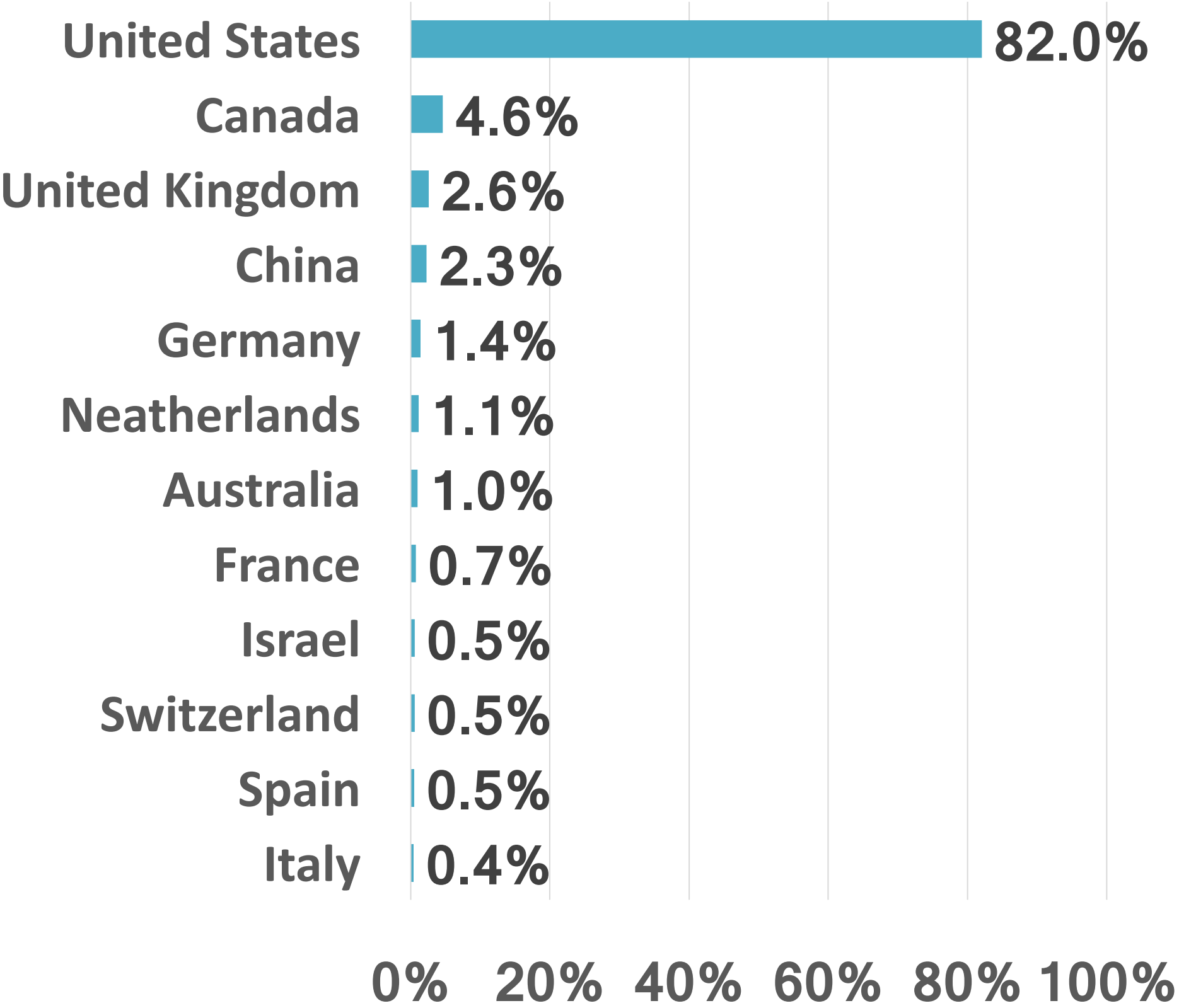
# POINT OF ORIGIN

# Point of Origin: Top Countries of Residence

International  
Visitors, 18.0%



Domestic  
Vistitors, 82.0%



Question: In what country do you reside? Base: All respondents. 1,616 responses.



# Point of Origin: Countries of Residence – Full Data

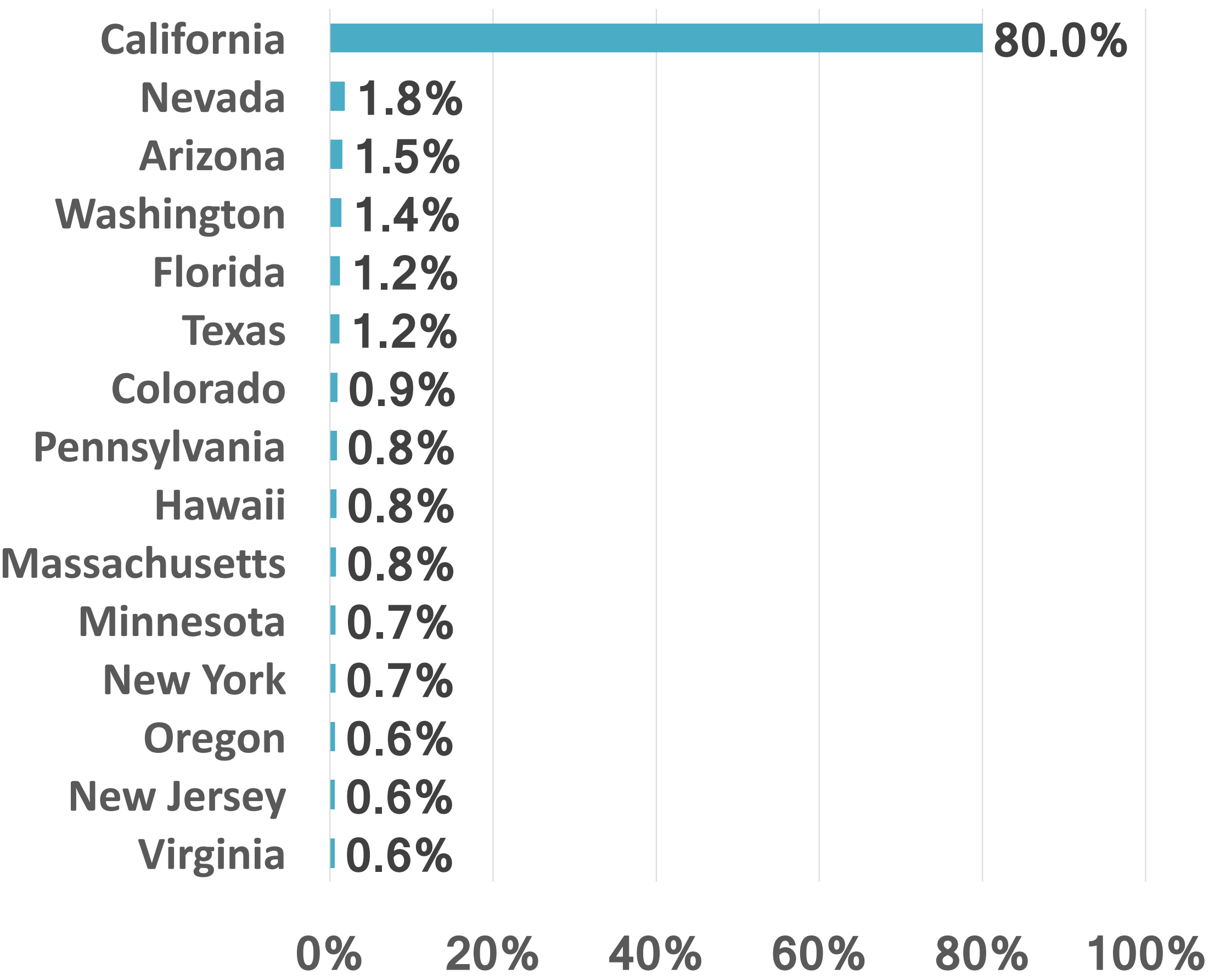
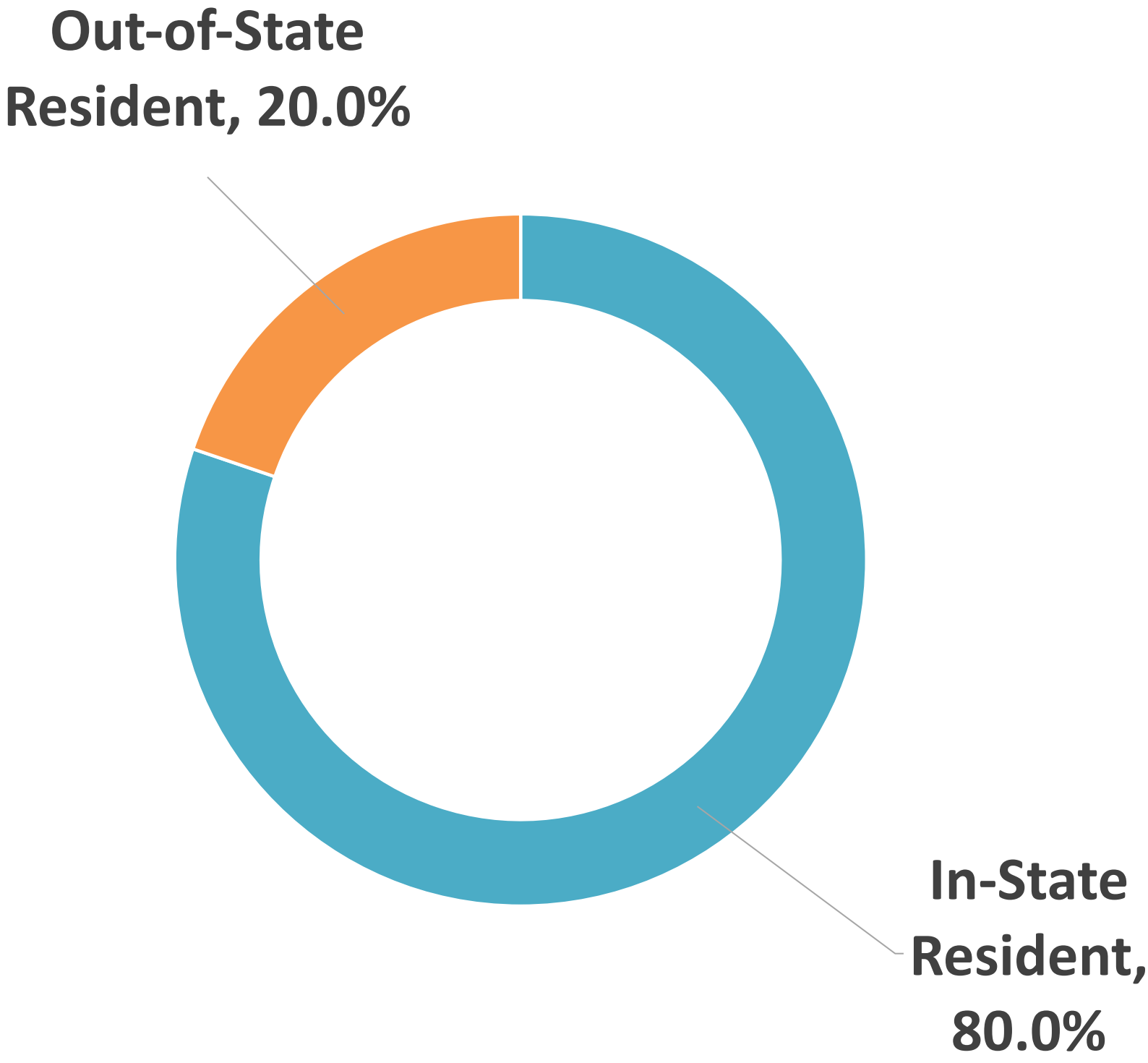
	Q4 Total	Hotel Guest	VFR	Day Trip
United States	82.0%	80.9%	86.2%	82.6%
Canada	4.6%	2.1%	3.0%	5.6%
United Kingdom	2.6%	5.0%	0.5%	1.7%
China	2.3%	3.1%	2.0%	2.0%
Germany	1.4%	2.1%	2.0%	1.1%
Netherlands	1.1%	0.7%	1.0%	1.3%
France	1.0%	0.7%	0.5%	1.1%
Australia	0.7%	0.7%	0.5%	0.7%
Israel	0.5%	0.3%	0.0%	0.7%
Switzerland	0.5%	0.8%	0.0%	0.4%
Spain	0.5%	0.2%	0.5%	0.7%
Italy	0.4%	0.6%	0.0%	0.4%
Mexico	0.4%	0.8%	1.0%	0.2%
Brazil	0.4%	0.3%	0.5%	0.2%
Sweden	0.3%	1.0%	1.5%	0.0%
Ukraine	0.3%	0.0%	0.0%	0.4%
Vietnam	0.3%	0.0%	0.0%	0.4%
India	0.2%	0.1%	1.0%	0.2%
Philippines	0.2%	0.0%	0.0%	0.2%
New Zealand	0.1%	0.2%	0.0%	0.0%
Chile	0.1%	0.0%	0.0%	0.0%
South Africa	0.0%	0.1%	0.0%	0.0%
Sample size:	1,616	857	203	461

**Question:** In what country do you reside?

**Base:** All respondents. 1,616 responses.



# Point of Origin: Top States of Residence



Question: What state do you live in? Base: All domestic respondents. 1,229 responses.

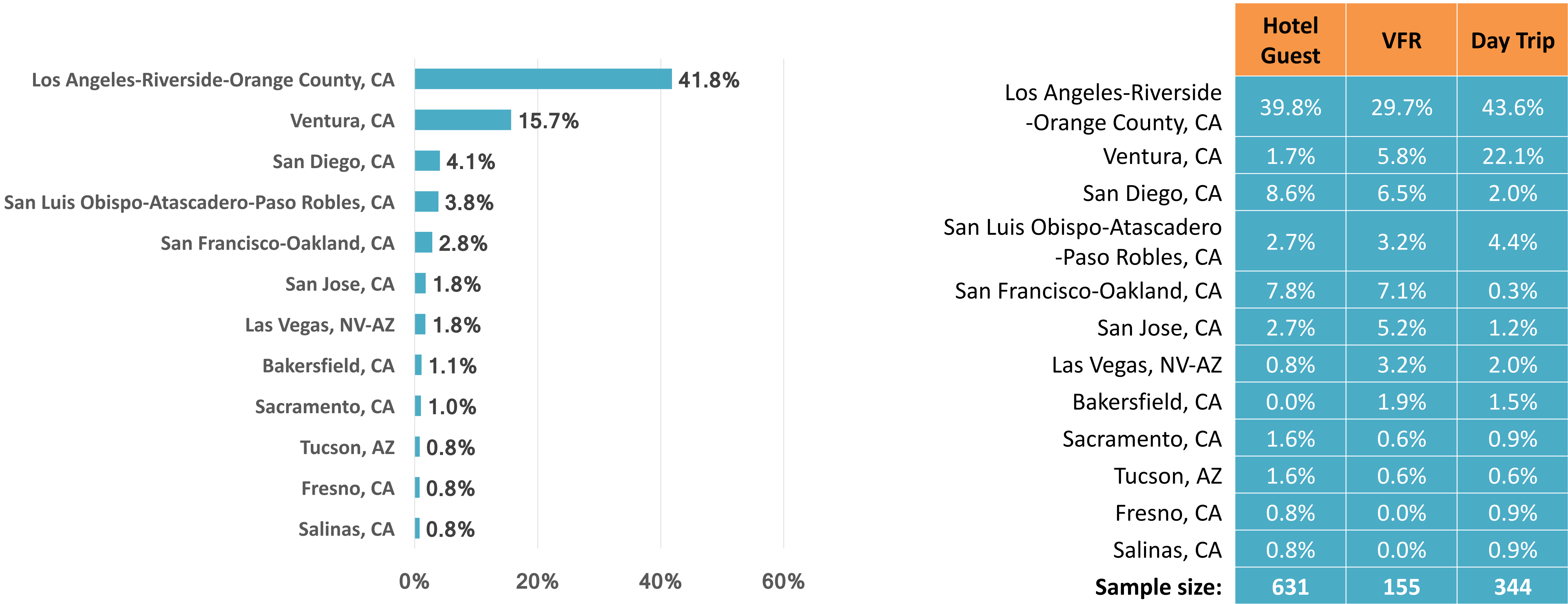
# Point of Origin: Top States of Residence

	Hotel Guest	VFR	Day Trip
California	72.1%	66.9%	84.3%
Nevada	0.6%	3.1%	2.2%
Arizona	2.5%	1.8%	1.1%
Washington	1.5%	1.2%	1.4%
Florida	1.4%	0.0%	1.1%
Texas	2.3%	2.5%	0.6%
Colorado	1.5%	1.8%	0.6%
Pennsylvania	1.1%	2.5%	0.6%
Hawaii	0.0%	0.6%	1.1%
Massachusetts	1.4%	0.6%	0.6%
Minnesota	0.8%	1.8%	0.6%
New York	1.2%	1.8%	0.3%
Oregon	1.1%	0.0%	0.6%
New Jersey	1.4%	1.2%	0.3%
Virginia	1.1%	1.8%	0.3%
Sample Size	653	163	356

**Question:** What state do you live in?

**Base:** All domestic respondents. 1,243 responses.

# Point of Origin: Top MSAs of Residence



Question: What is your zip/postal code? Base: All domestic respondents. 1,180 responses.



# Point of Origin: By County

	Total	Hotel Guest	VFR	Day Trip
Los Angeles, CA	27.7%	22.4%	21.0%	30.1%
Ventura, CA	16.7%	1.7%	3.4%	23.4%
Orange, CA	6.7%	10.1%	5.9%	5.6%
San Luis Obispo, CA	4.5%	2.8%	4.2%	5.2%
San Diego, CA	3.6%	8.0%	4.2%	1.9%
Santa Clara, CA	2.0%	2.8%	4.2%	1.5%
Clark, NV	1.9%	0.6%	4.2%	2.2%
San Bernardino, CA	1.8%	4.1%	0.8%	1.1%
Kern, CA	1.2%	0.0%	2.5%	1.5%
Riverside, CA	1.1%	2.2%	0.8%	0.7%
Pima, AZ	1.0%	1.7%	0.8%	0.7%
Alameda, CA	1.0%	2.2%	0.8%	0.4%
Santa Cruz, CA	0.9%	1.9%	3.4%	0.4%
Hennipin, MN	0.8%	0.9%	1.7%	0.7%
Maricopa, AZ	0.8%	0.6%	1.7%	0.7%
San Francisco, CA	0.5%	1.1%	3.4%	0.0%
San Mateo, CA	0.5%	1.9%	0.0%	0.0%
Sacramento, CA	0.4%	1.5%	0.8%	0.0%
King, CA	0.4%	1.3%	0.0%	0.0%
Sample	891	464	119	269

**Question:** What is your zip/postal code?

**Base:** All domestic respondents. 891 responses.

The background image shows a historic building with a red-tiled roof and a small dome. Palm trees are visible in the foreground and background. The text "KEY VISITOR SEGMENTS" is overlaid in the center.

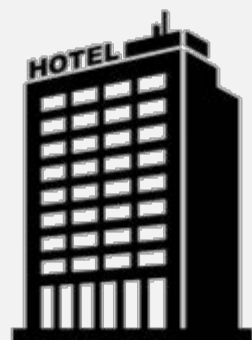
# KEY VISITOR SEGMENTS



# THE HOTEL GUEST VISITOR

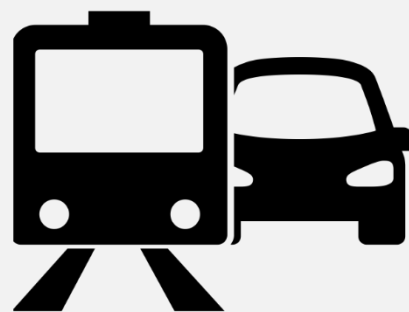


Visitors who stayed overnight in a hotel in the Santa Barbara South Coast during their trip.



## Hotel Stay Details

Mean hotel spend daily – \$228.53  
Mean # of people in hotel room – 2.4



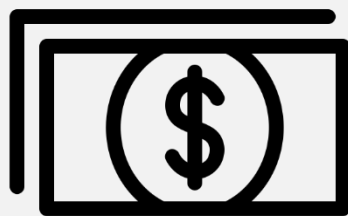
## Top Methods of Arrival

- Personal Vehicle - 52.0%
- Rental Vehicle - 20.5%
- Commercial Airline - 13.4%
- Train/Amtrak - 14.5%



## Days Spent in the Santa Barbara Area

Mean – 2.8 days

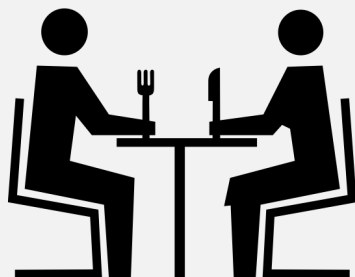


## Average Daily Spending In-Market

Mean – \$520.78, per travel party

## Top Activities Participated In

- Dining in Restaurants - 79.1%
- Beaches - 58.9%
- Shopping - 50.1%
- Bars or Nightlife - 26.8%



## Mean Travel Party Size

- 2.9 people, on average
- 12.2% of travel parties had children



## Key Demographics

Annual household income – \$167,790

Marital Status: Married/Partnered – 68.9%  
Single – 24.0%



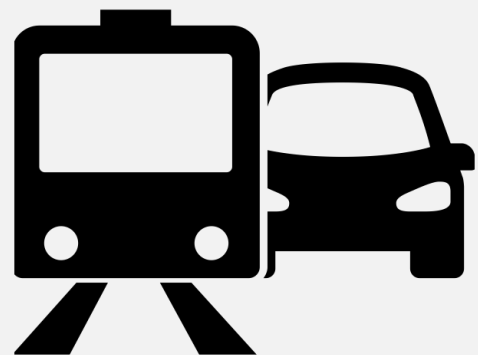
Mean age – 51.0



# THE INTERNATIONAL VISITOR



Visitors who reside outside the United States.



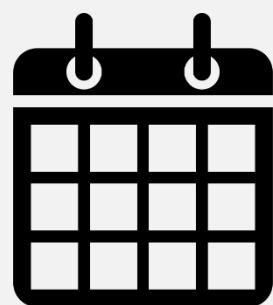
## Top Methods of Arrival

- Rental Vehicle - 35.0%
- Personal Vehicle - 24.2%
- Train/Amtrak - 14.5%
- Commercial Airline - 12.9%



## Days Spent in the Santa Barbara Area

Mean – 2.2 days



## Average Travel Planning Window for SB Trip

Mean - 6.6 weeks

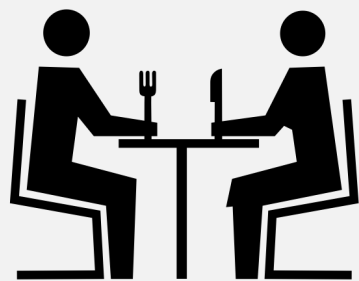


## Average Daily Spending In-Market

Mean – \$618.52, per travel party

## Top Activities Participated In

- Dining in Restaurants - 71.4%
- Beaches - 56.6%
- Shopping - 46.8%
- Visit Museums - 17.9%



## Mean Travel Party Size

- 3.3 people, on average
- 15.9% of travel parties had children



## Key Demographics

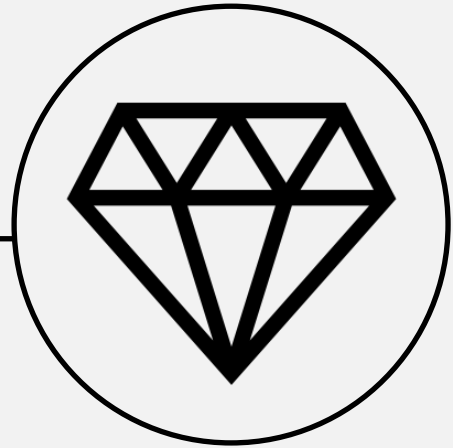
Annual household income – \$112,824

Marital Status: Married/Partnered – 69.0%  
Single – 26.5%

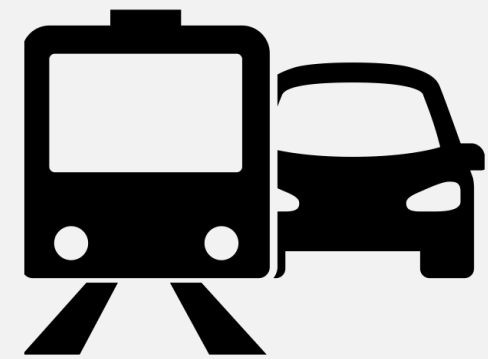
Mean age – 43.6



# THE AFFLUENT VISITOR

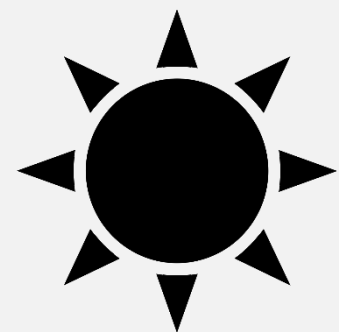


Visitors who reported having an annual household income over \$200,000.



## Top Methods of Arrival

- Personal Vehicle - 52.9%
- Rental Vehicle - 19.1%
- Train/Amtrak - 15.7%
- Commercial Airline - 6.4%



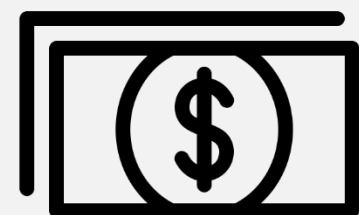
## Days Spent in the Santa Barbara Area

Mean – 2.1 days



## Average Travel Planning Window for SB Trip

Mean - 4.7 weeks

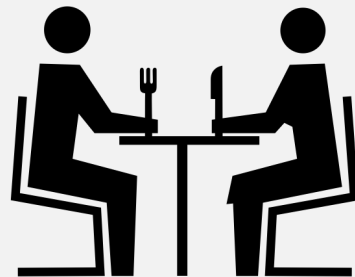


## Average Daily Spending In-Market

Mean – \$997.65, per travel party

## Top Activities Participated In

- Dining in Restaurants - 77.8%
- Beaches - 55.3%
- Shopping - 49.7%
- Visit Gardens/Parks - 23.5%



## Mean Travel Party Size

- 3.8 people, on average
- 18.5% of travel parties had children



## Key Demographics

Annual household income – \$374,854

Marital Status: Married/Partnered – 76.4%  
Single – 21.6%

Mean age – 49.2

