SANTA BARBARA & TODAY'S TRAVELER

DESTINATION ANALYSTS' THE STATE OF THE AMERICAN TRAVELER + TRAVEL SENTIMENT INDEX—MARCH 2022

Destination Analysts

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Today

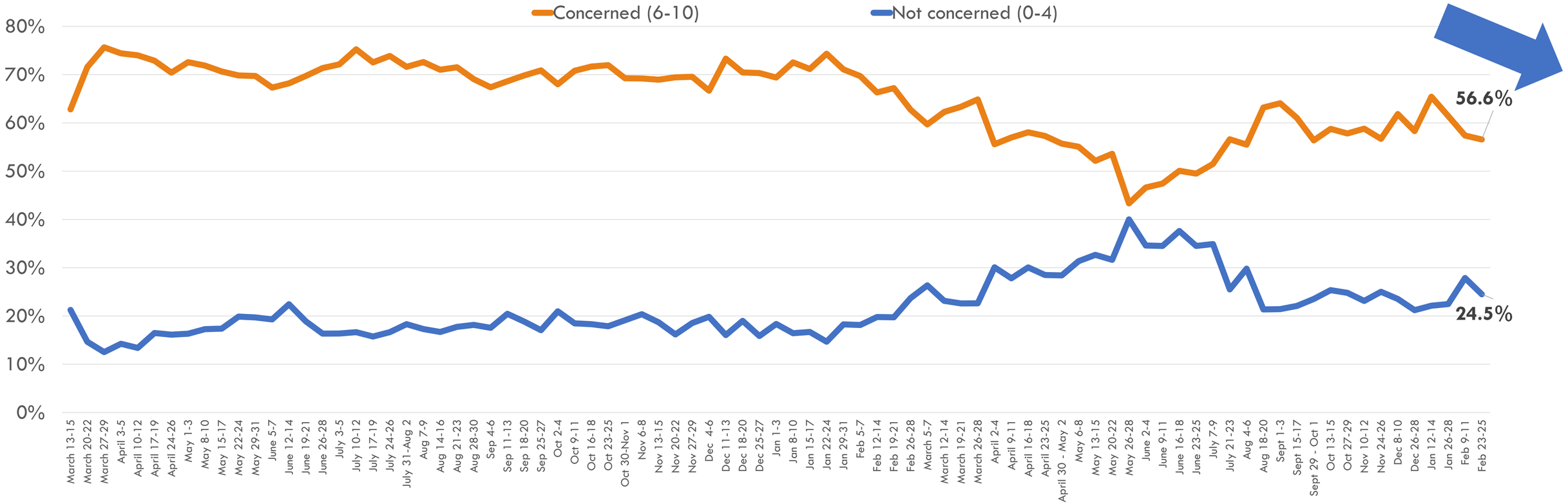
- National Travel Trends
- Santa Barbara Advertising Insights
- Visitor Insights

NATIONAL TRAVEL TRENDS

Even as COVID retreats as an impediment, financial strain is beginning to be evident in American travel sentiment.

PERSONAL HEALTH CONCERNS (MAR 2020 – FEB 2022)

Question: **Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)**



(Base: Waves 1-85. All respondents, 1,200+ completed surveys each wave.)

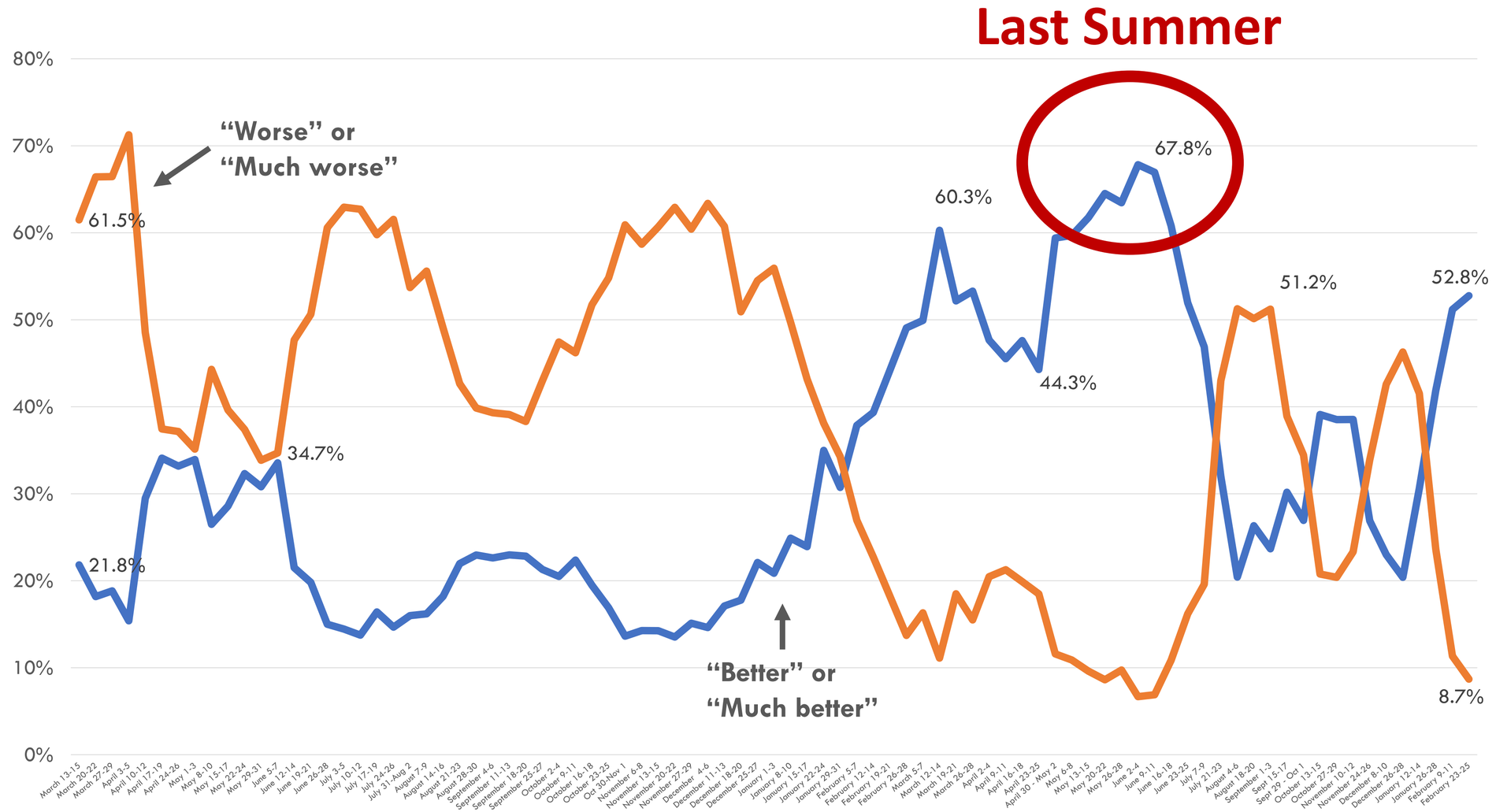
EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-85)

Question: **In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?**

In the next month the coronavirus situation will get

_____

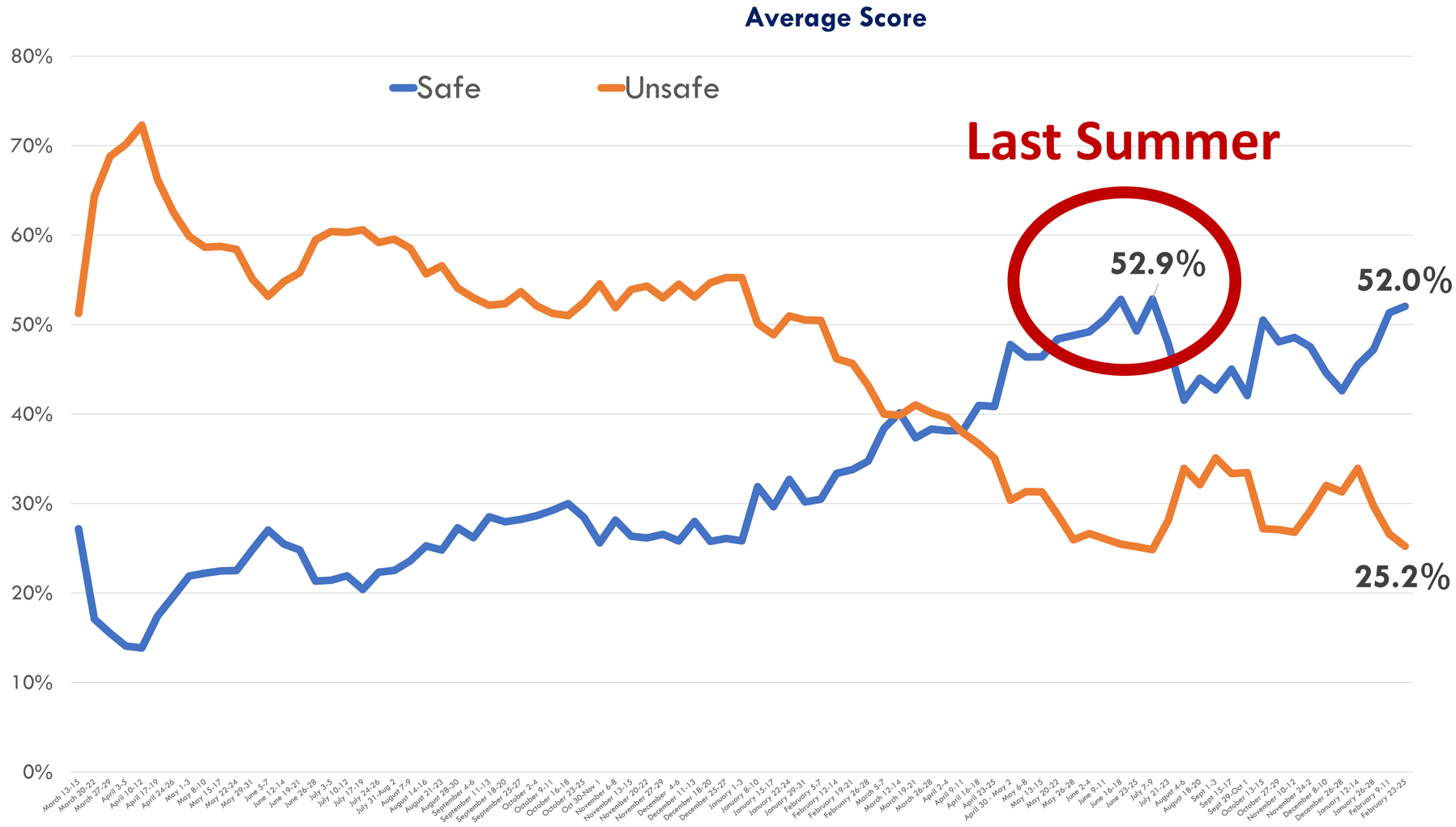
(Base: Waves 1-85. All respondents, 1,200+ completed surveys each wave.)



AVERAGE SAFETY PERCEPTIONS OF TRAVEL ACTIVITIES (MAR 2020 – FEB 2022)

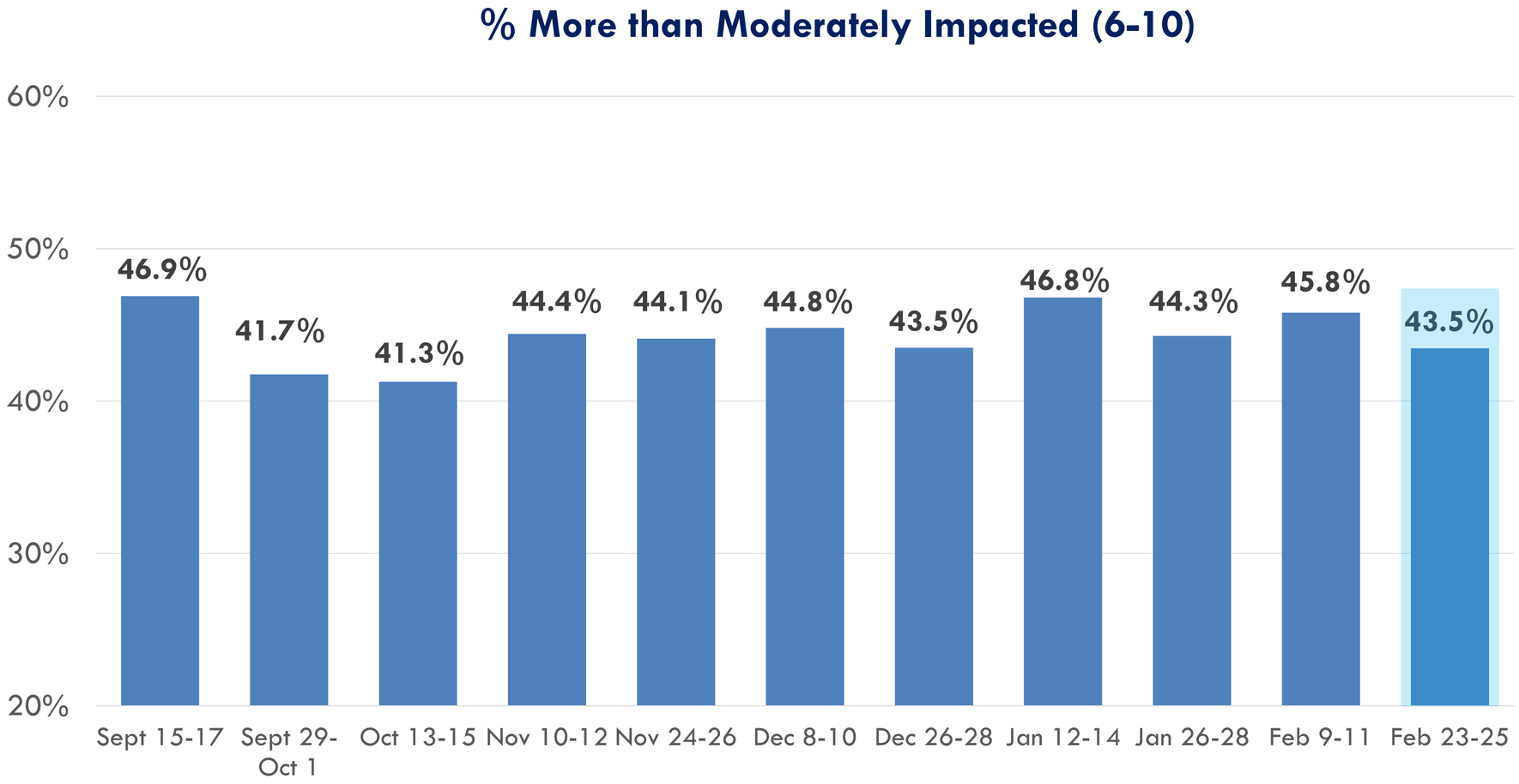
Question: **At this moment, how safe would you feel doing each type of travel activity?**

(Base: Waves 1-85. All respondents, 1,200+ completed surveys each wave.)



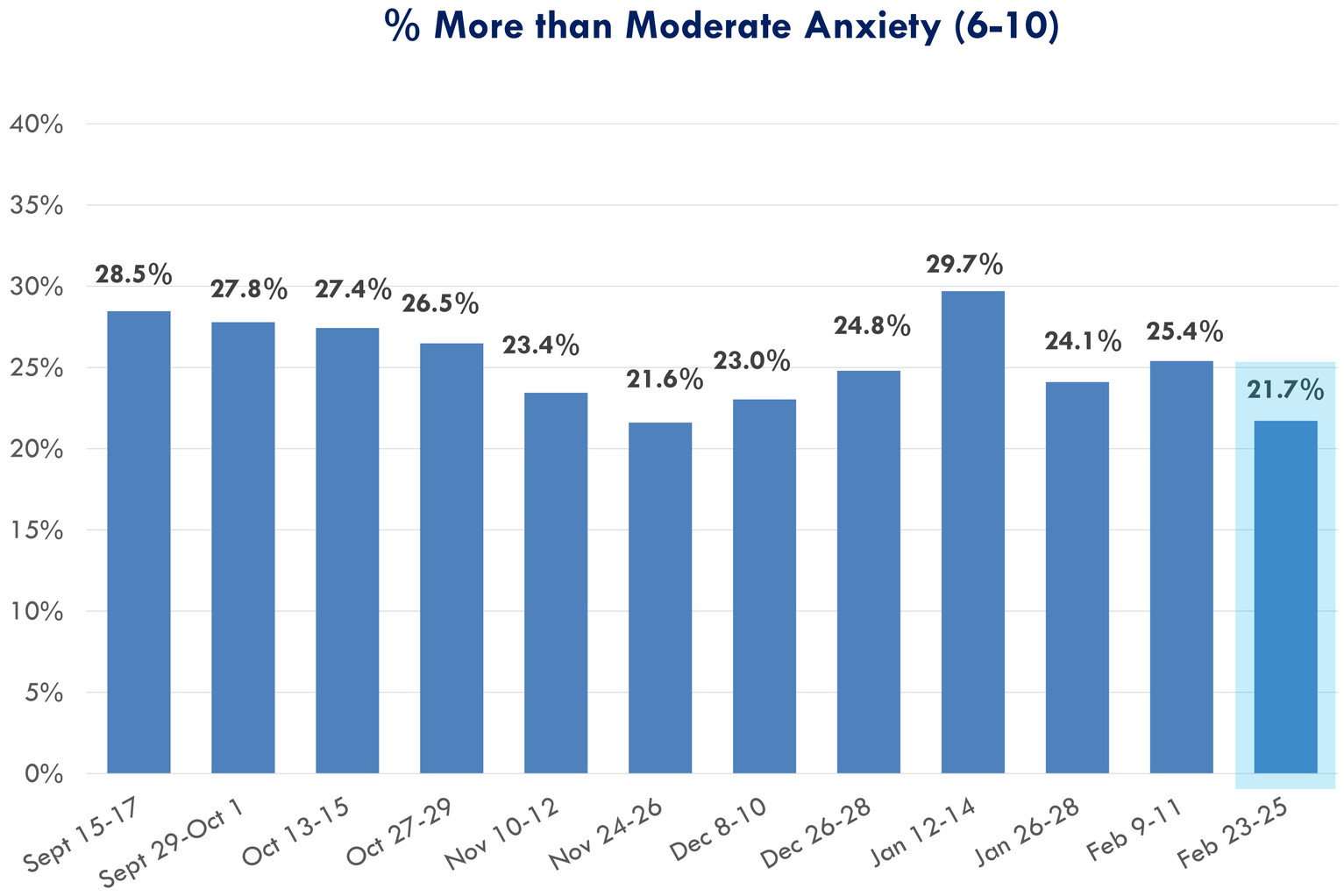
COVID-19'S IMPACT ON MEANINGFUL TRAVEL EXPERIENCES

Question: How much is the COVID-19 issue impacting your ability to have meaningful travel experiences? (Select one)



MOST RECENT OVERNIGHT TRIP: COVID-19 ANXIETY

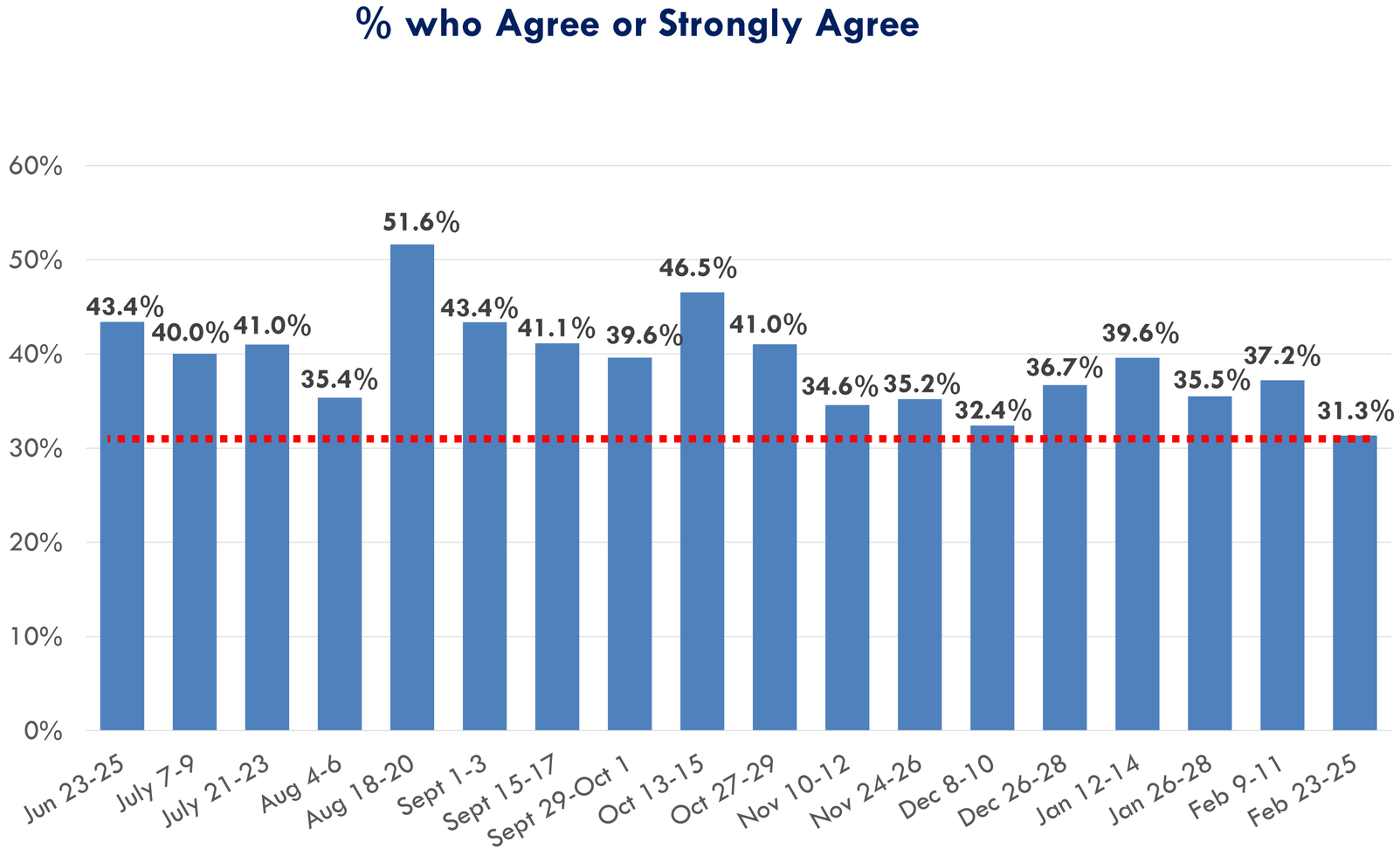
Question: While traveling on your most recent overnight trip, HOW MUCH ANXIETY did you generally feel about the COVID-19 situation?



MOST RECENT OVERNIGHT TRIP:
TRAVEL BUSINESSES HAVING TROUBLE PROVIDING ADEQUATE SERVICE

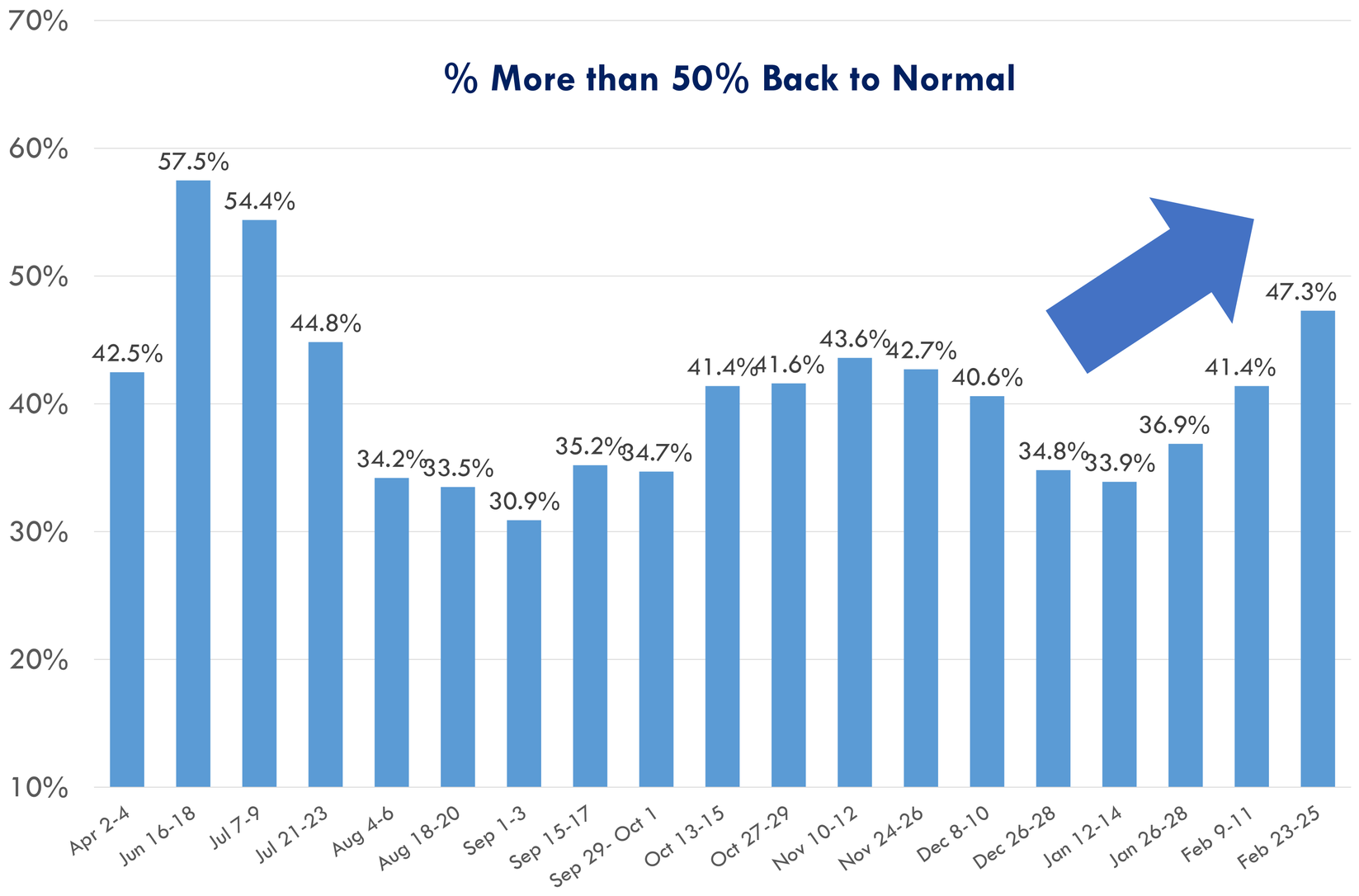
Question: How much do you agree or disagree with the following statement?

On my most recent trip, it seemed like businesses in the travel industry were having trouble providing adequate service to travelers.



RETURNING TO NORMAL

Question: Overall, how close to "normal" is the U.S. in terms of resuming leisure activities (dining out, travel, etc.)?

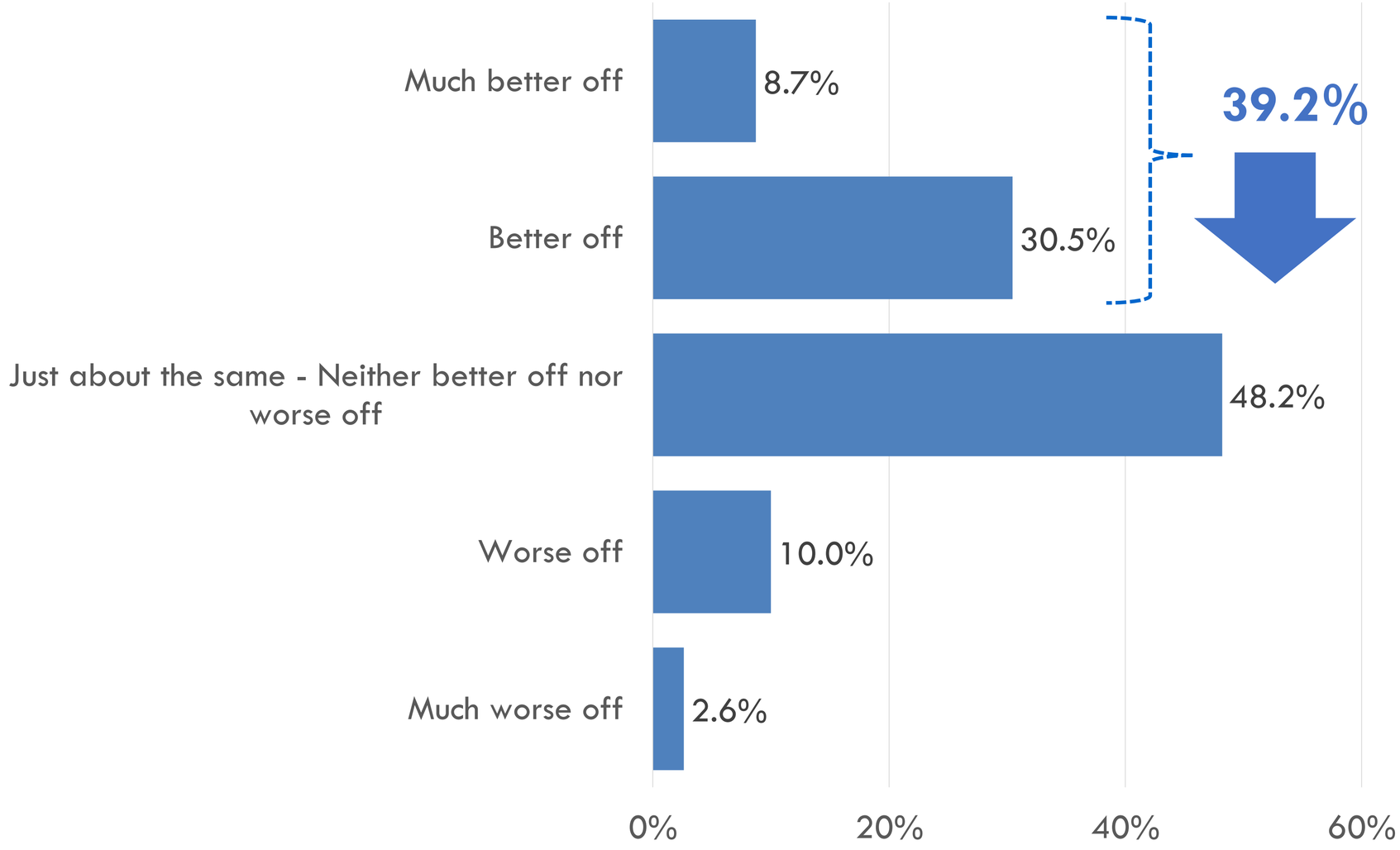


Destination Analysts
DO YOUR RESEARCH

EXPECTATIONS FOR FUTURE FINANCES

Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

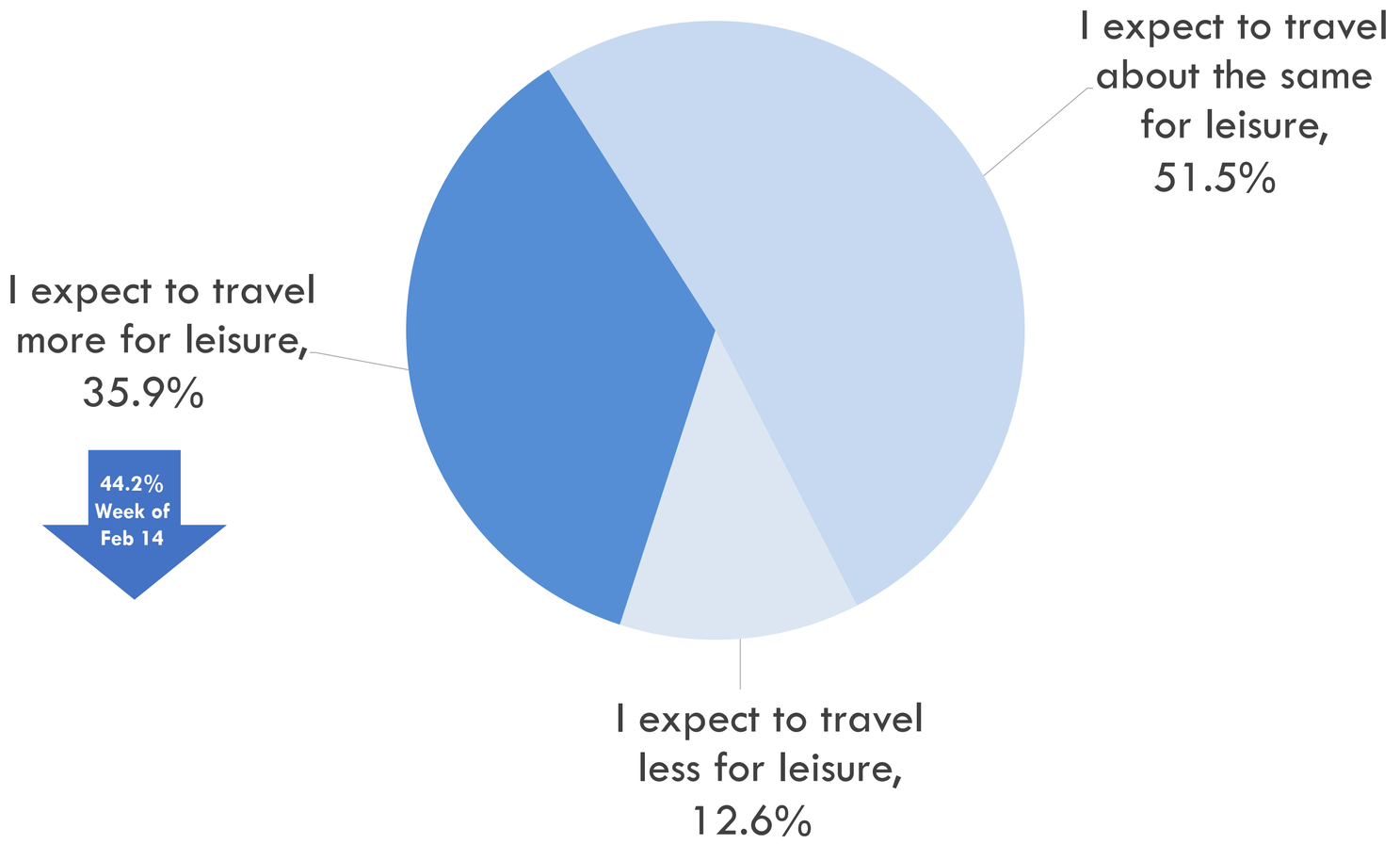
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



EXPECTATIONS FOR TRAVEL (NEXT 12 MONTHS)

Question: In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)

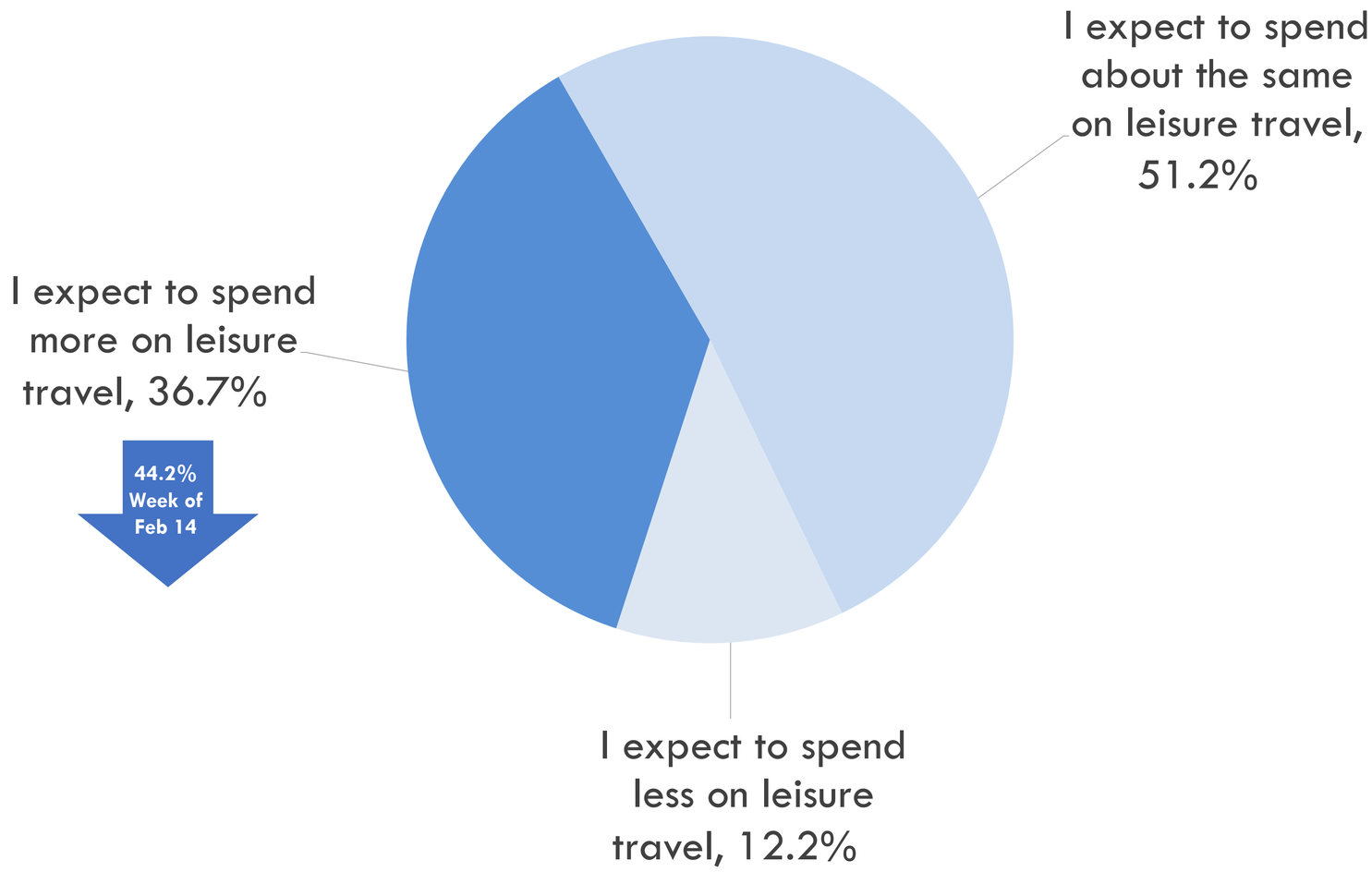
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



EXPECTATIONS FOR TRAVEL SPENDING (NEXT 12 MONTHS)

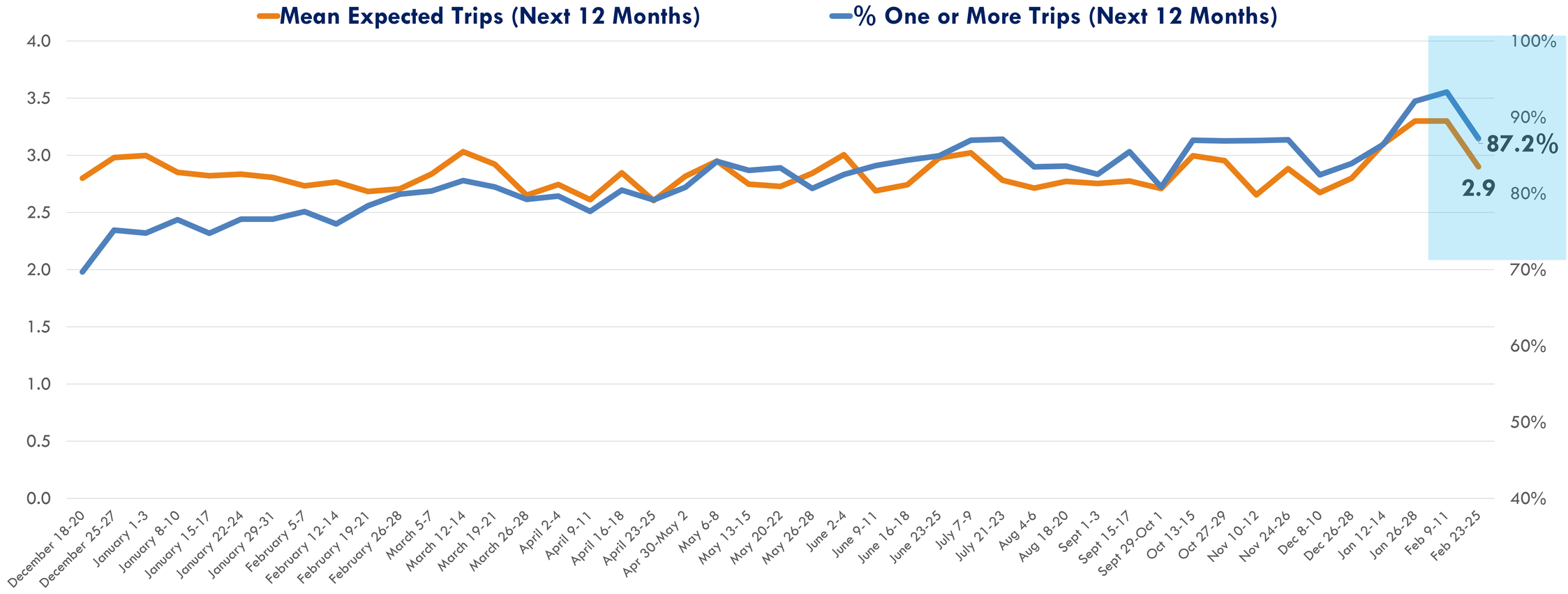
Question: In the NEXT 12 MONTHS, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period? (Select one)

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



NUMBER OF LEISURE TRIPS ANTICIPATED IN THE NEXT 12 MONTHS

Question: **IN TOTAL**, how many **leisure trips** (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)

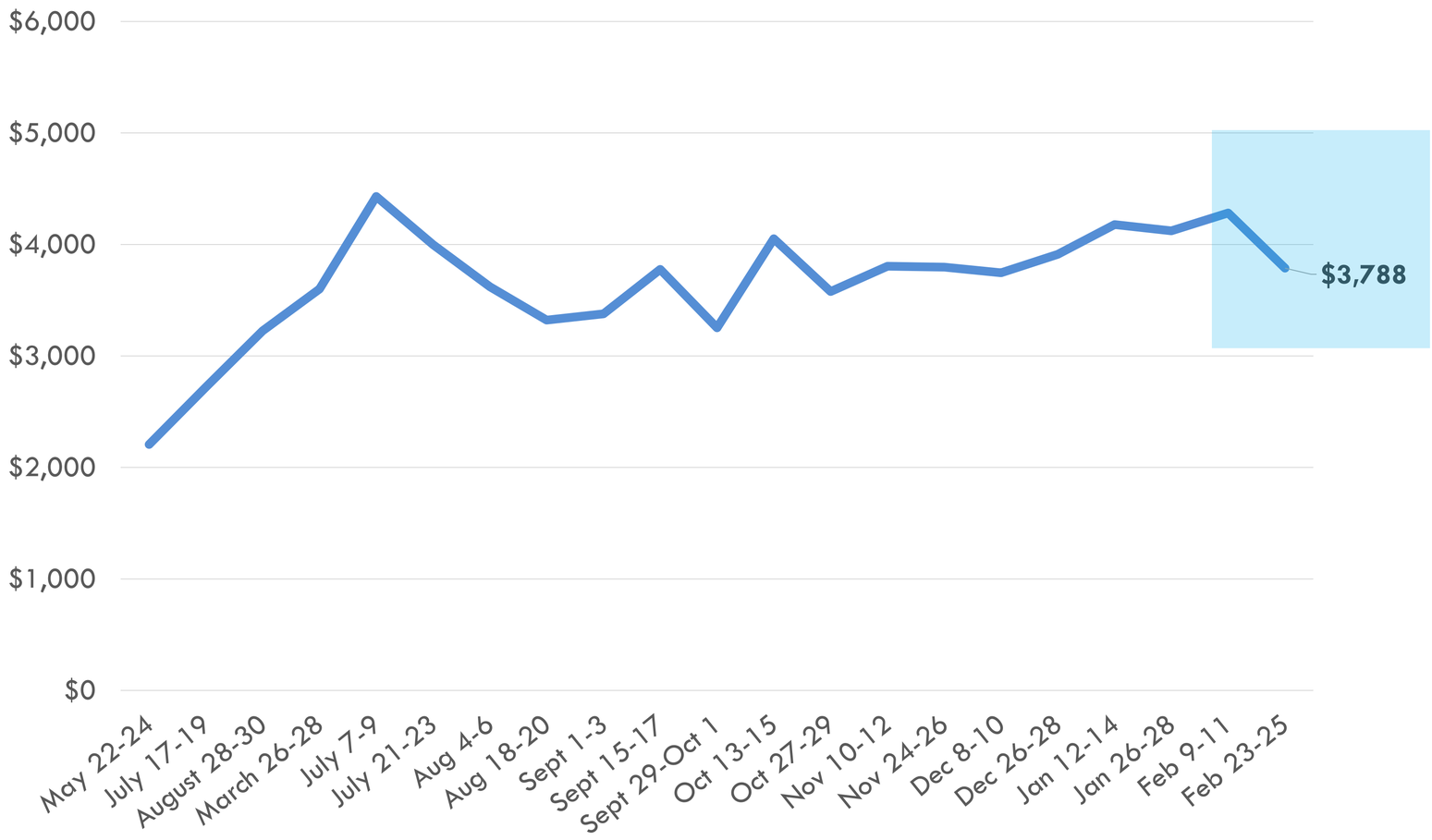


MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS

Question: **How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?**

Maximum I would spend on leisure travel (next 12 months):

_____

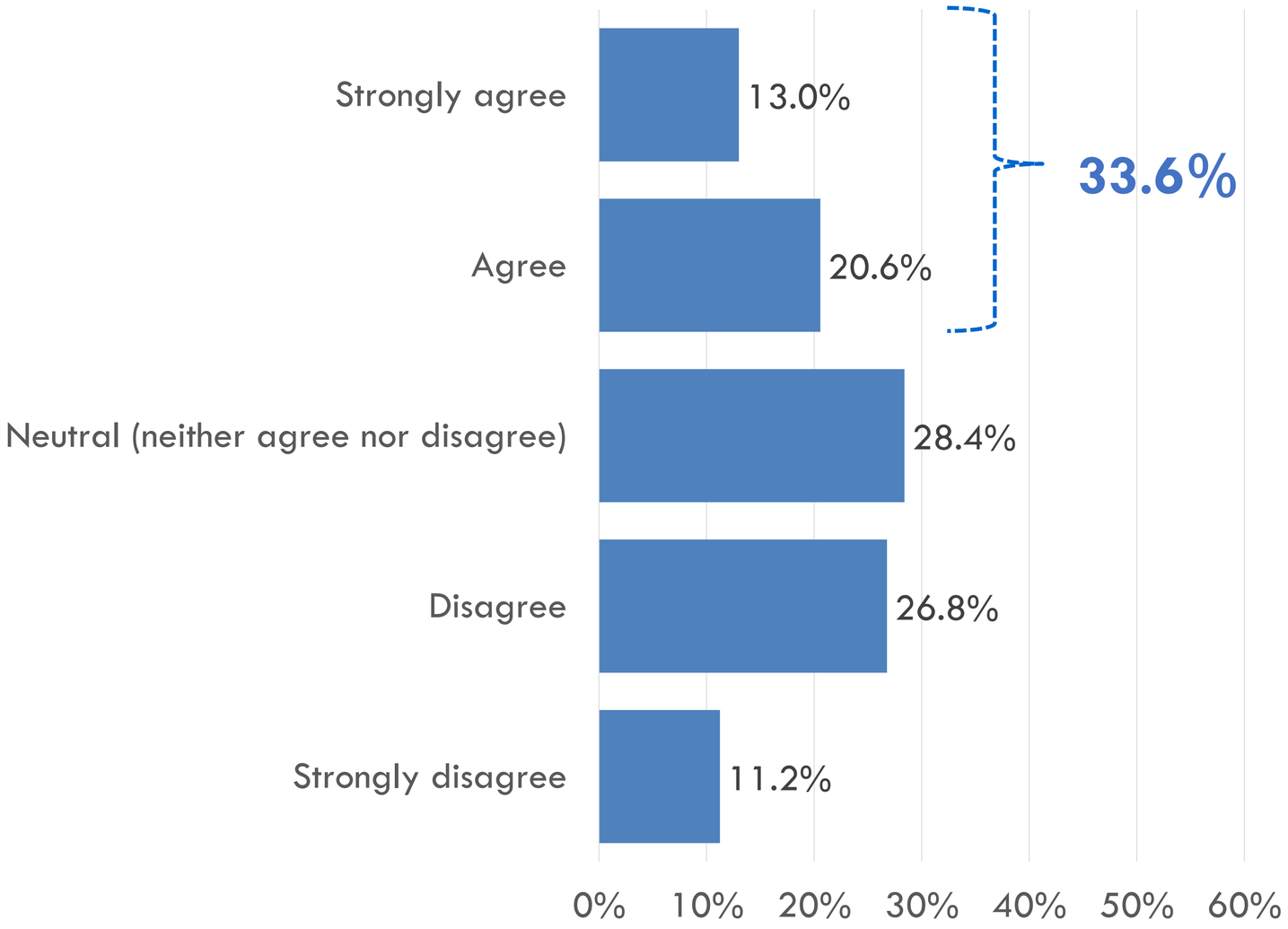


TRAVEL PRICES AS AN IMPEDIMENT TO TRAVEL

How much do you agree or disagree with the following statements?

Question: High travel prices have kept me from traveling in the past month.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

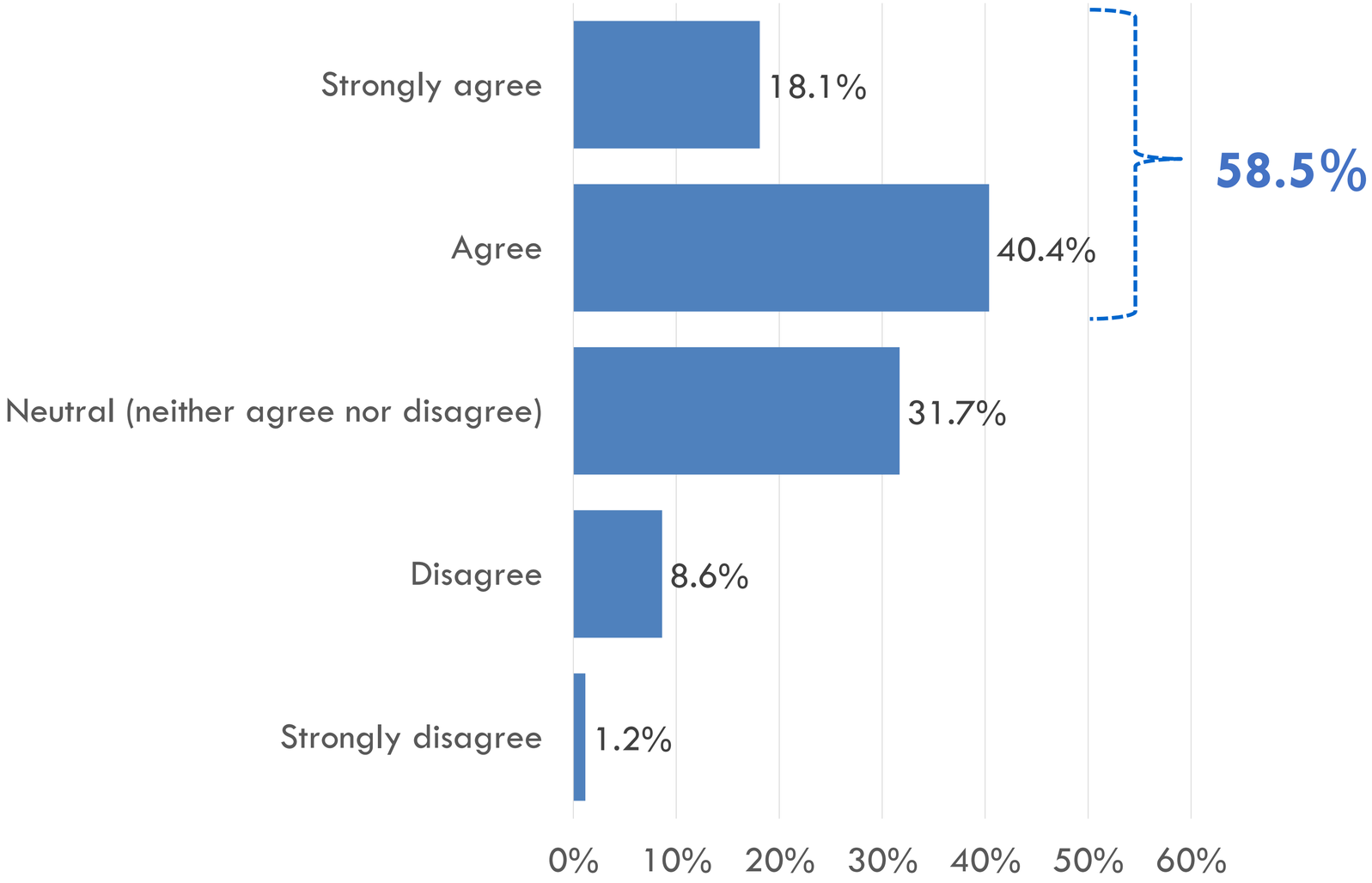


TRAVEL PRICES ARE TOO HIGH

How much do you agree or disagree with the following statements?

Question: Travel prices are generally too high right now.

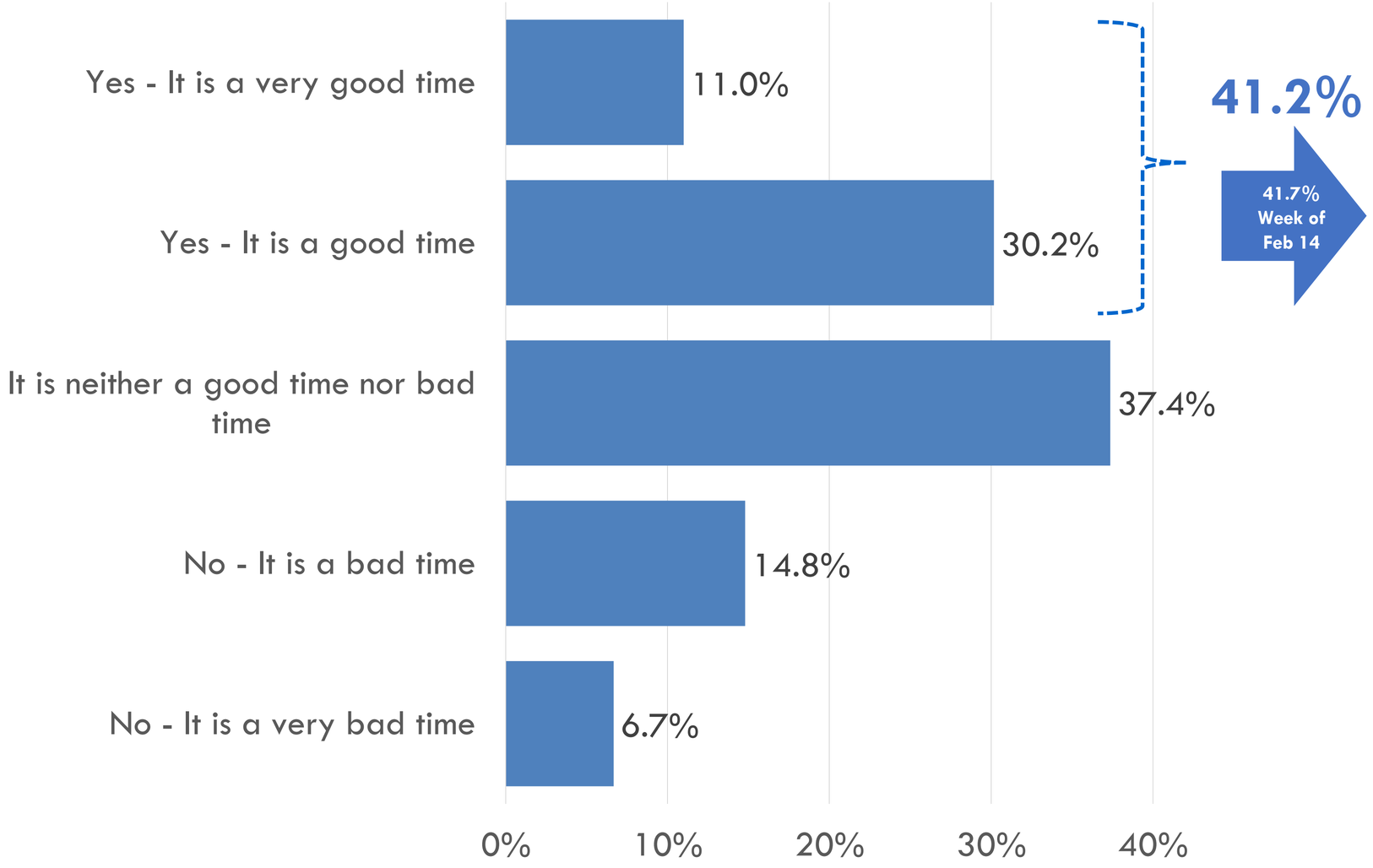
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



IS IT A GOOD TIME TO SPEND ON TRAVEL?

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

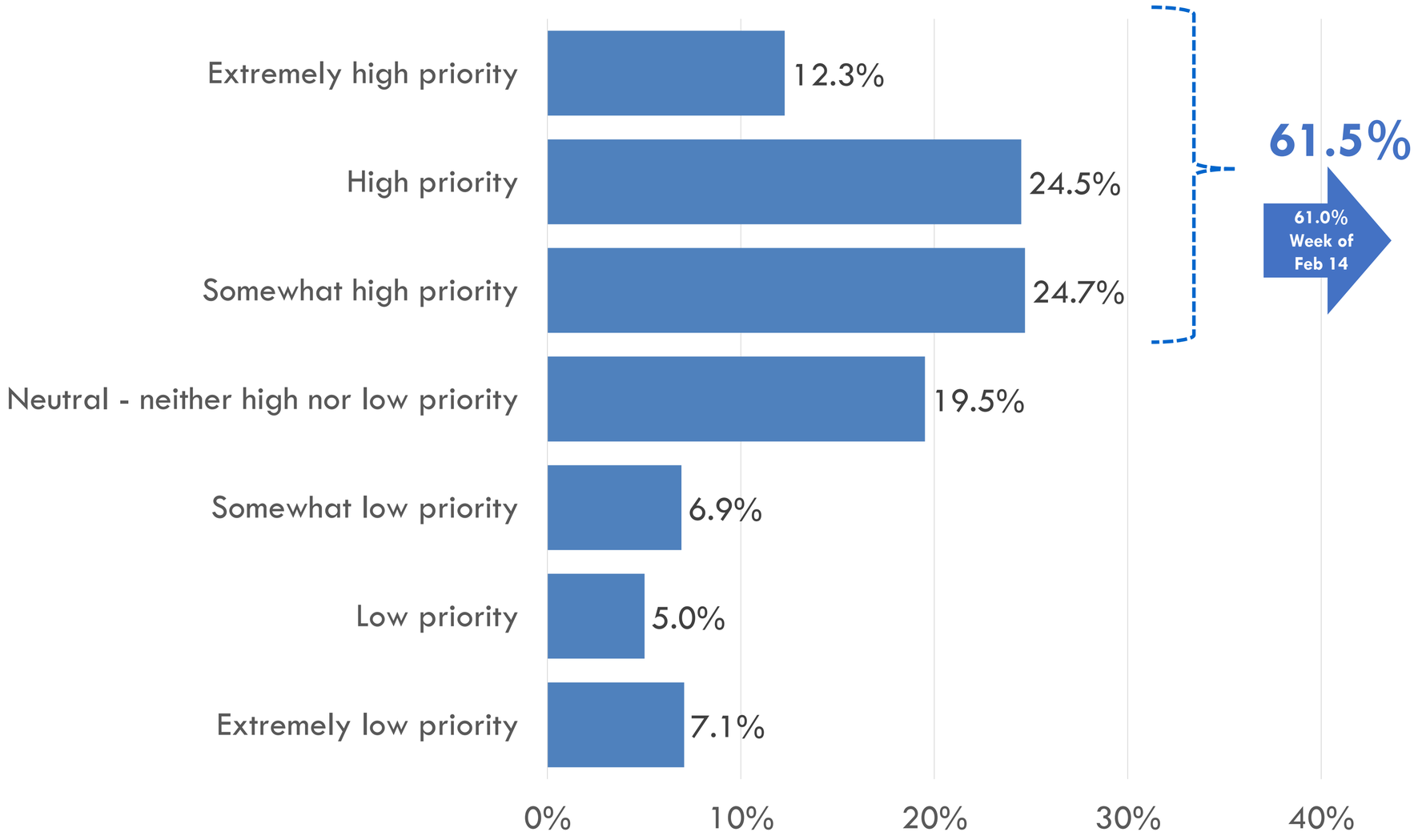


TRAVEL AS A BUDGET PRIORITY

Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

Leisure travel will be a(n) _____.

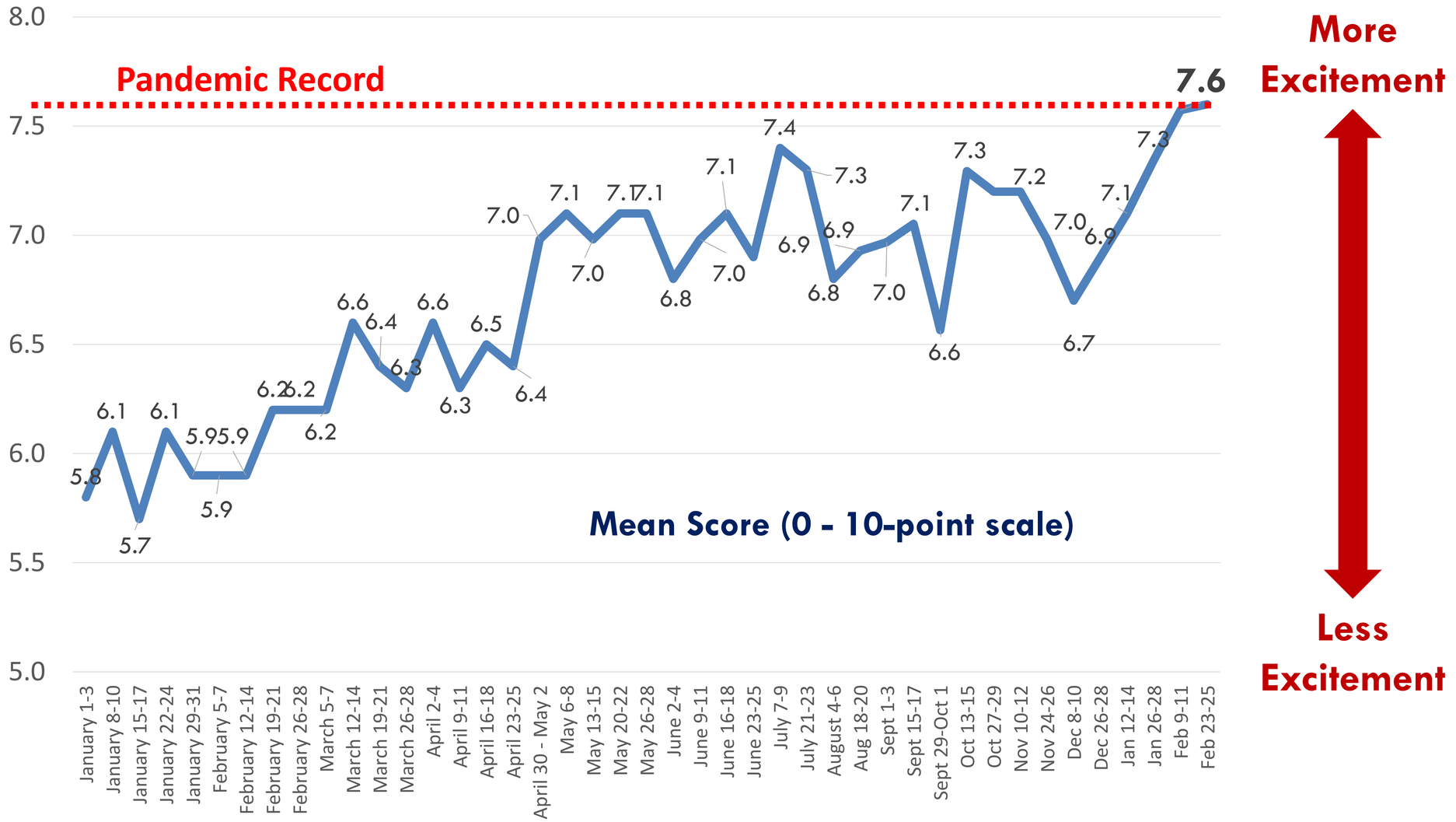
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



Excitement for travel is extraordinary, reaching records last seen in Summer 2021

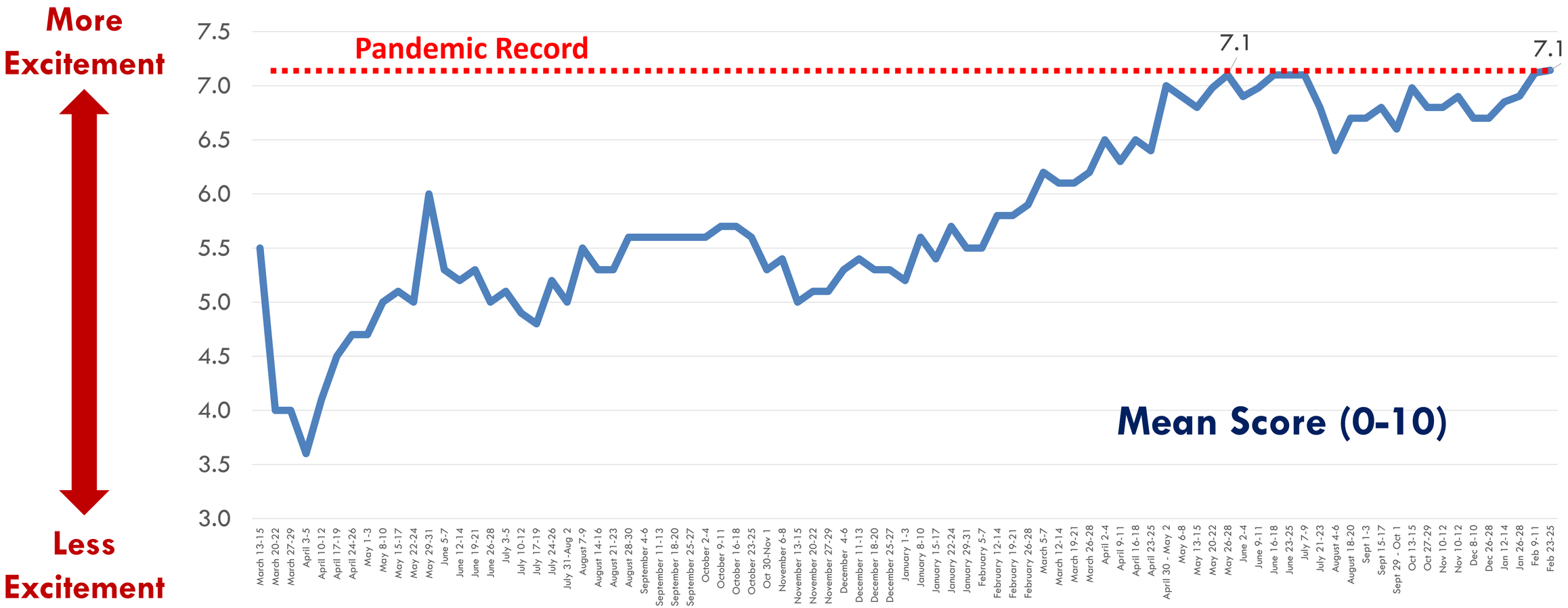
EXCITEMENT FOR LEISURE TRAVEL IN THE NEXT 12 MONTHS

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



EXCITEMENT TO TRAVEL NOW

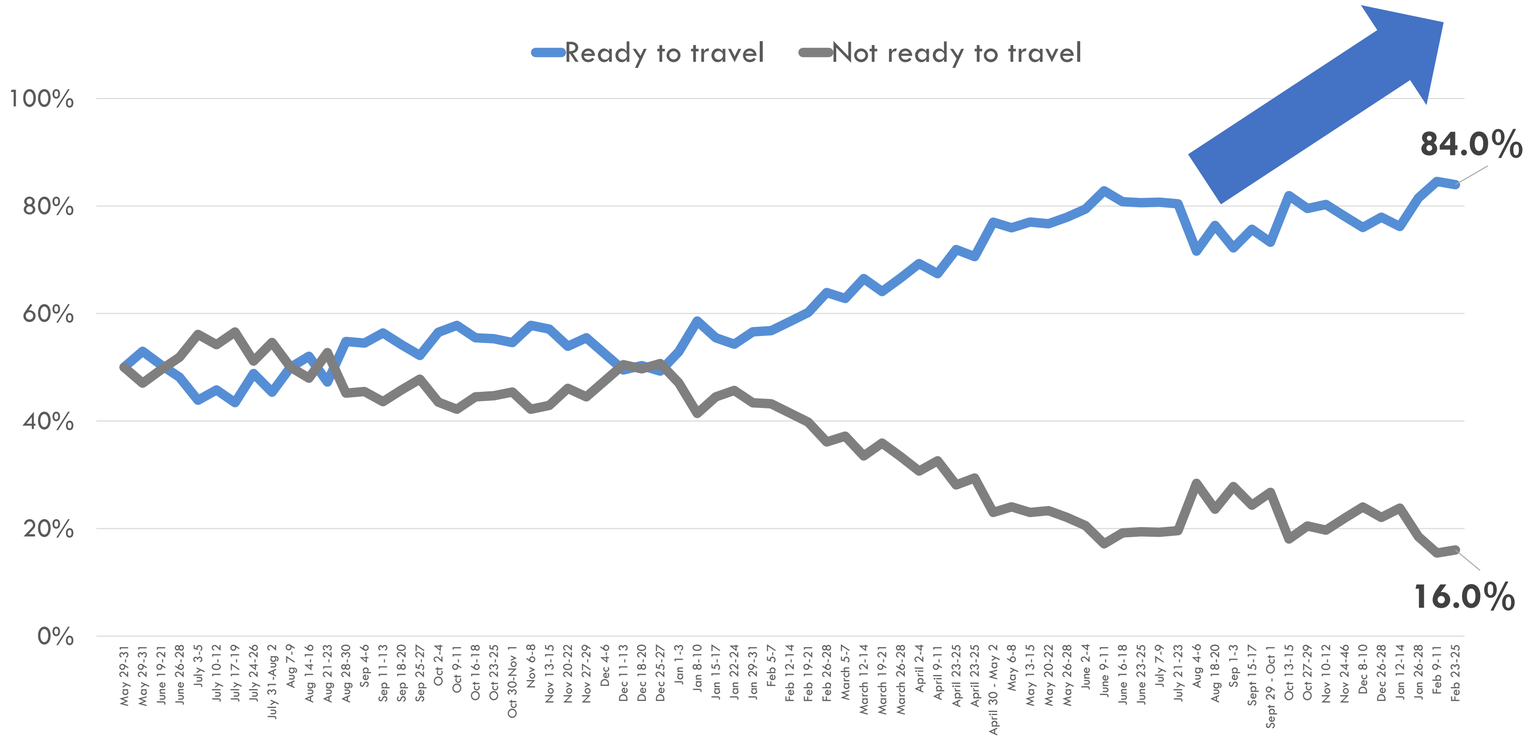
Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)



TRAVEL STATE-OF-MIND

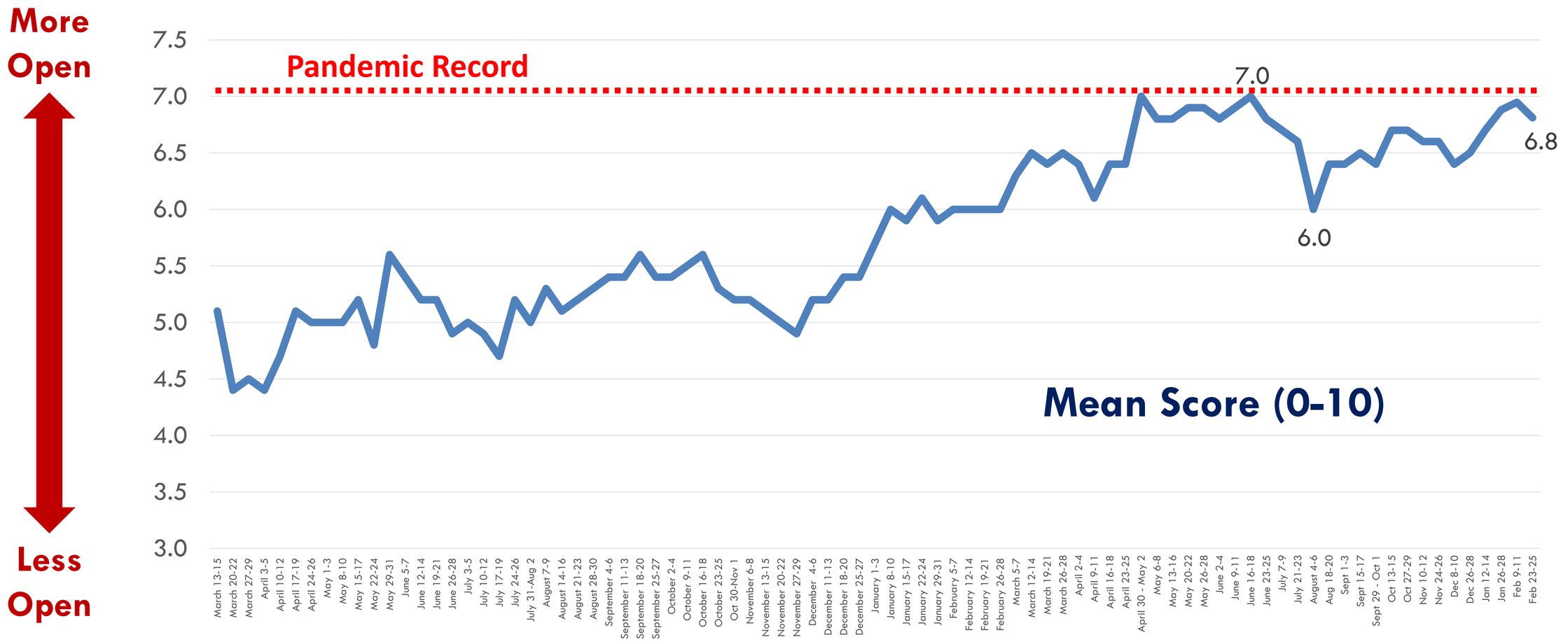
Question: **When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)**

Historical data



OPENNESS TO TRAVEL INSPIRATION

Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

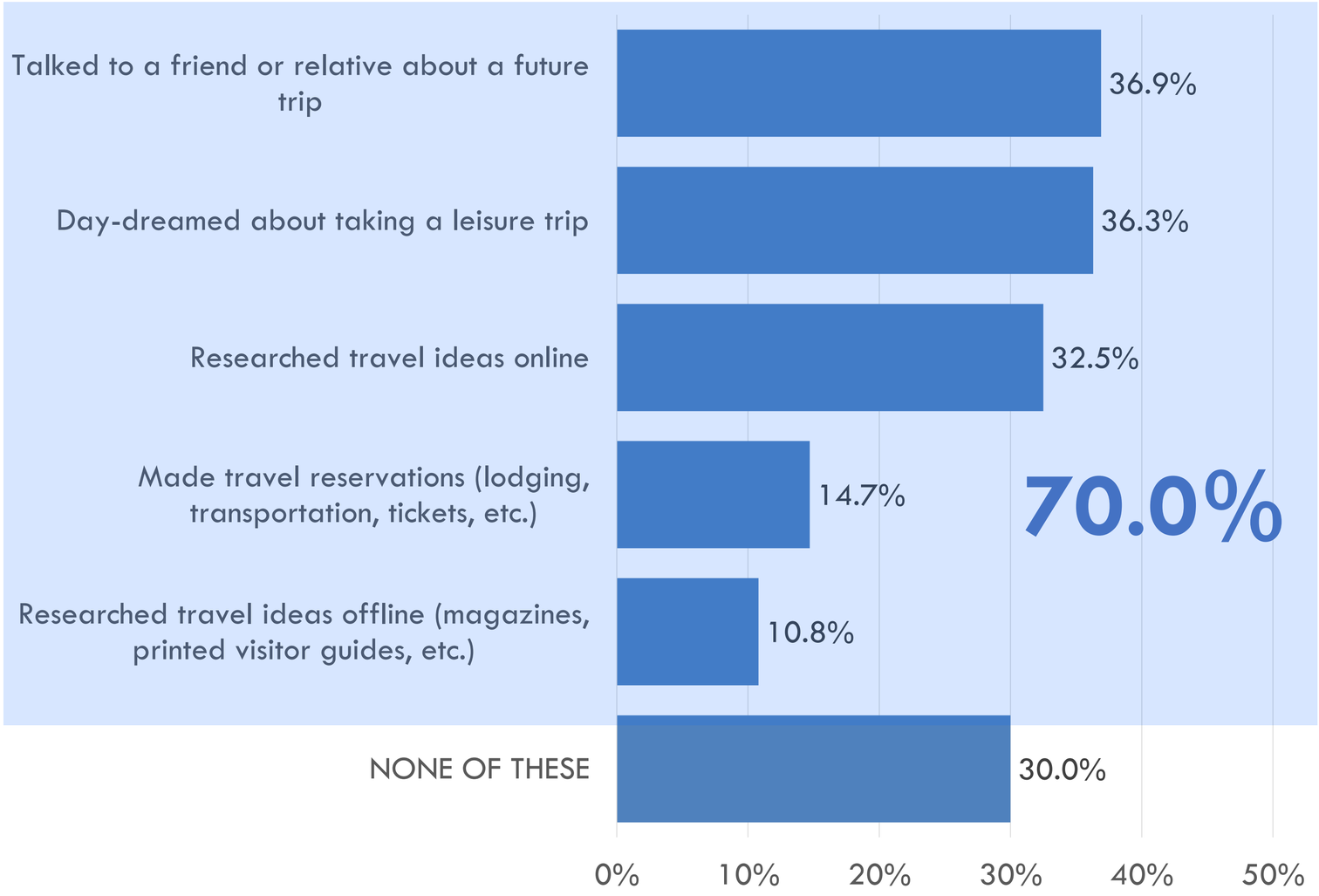


TRAVEL PLANNING IN THE PAST WEEK

Question: In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have

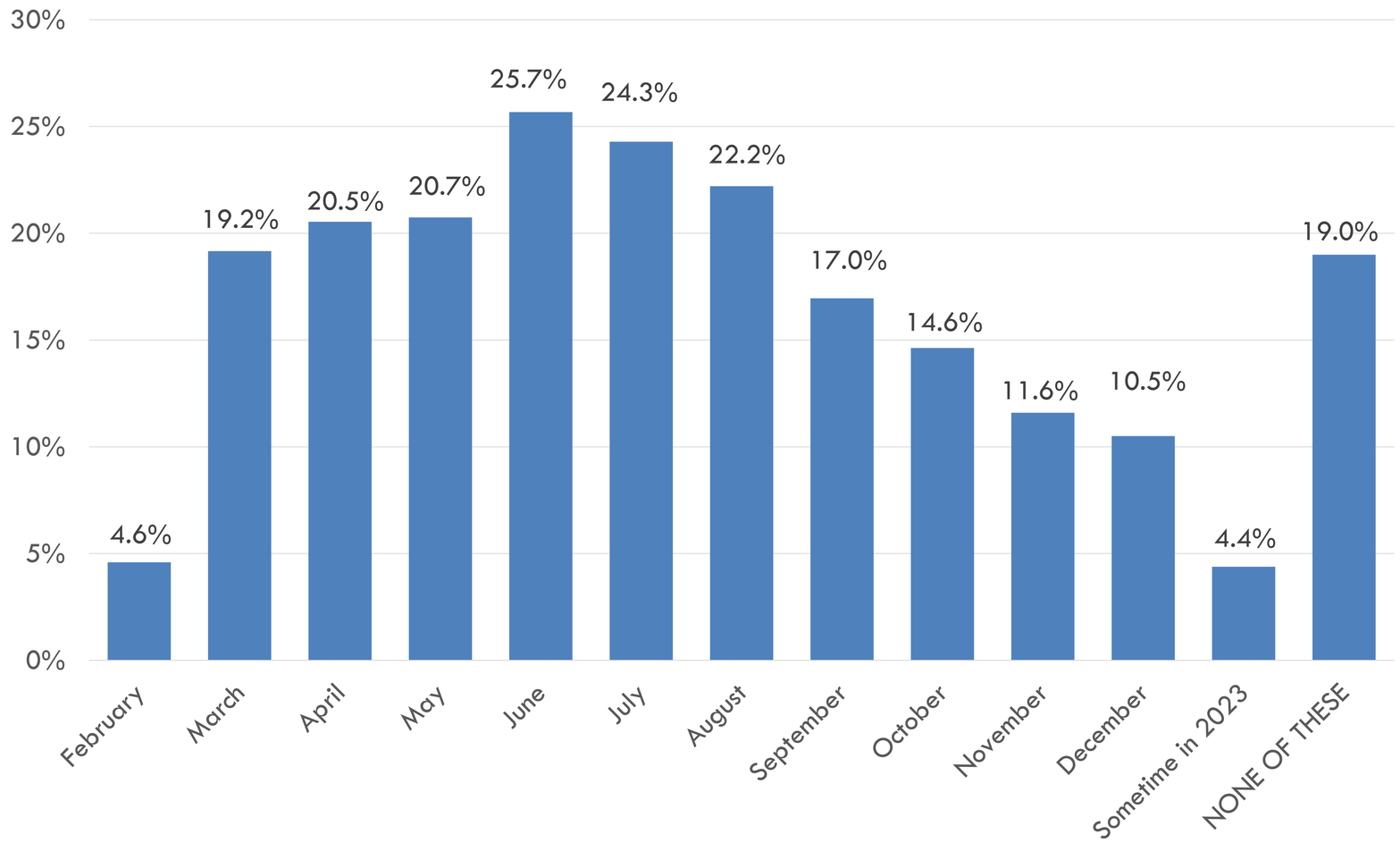
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



MONTHS OF EXPECTED LEISURE TRIPS IN 2022

Question: In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



In a highly enthusiastic and open mindset, exploration looks to be back in vogue for American travelers

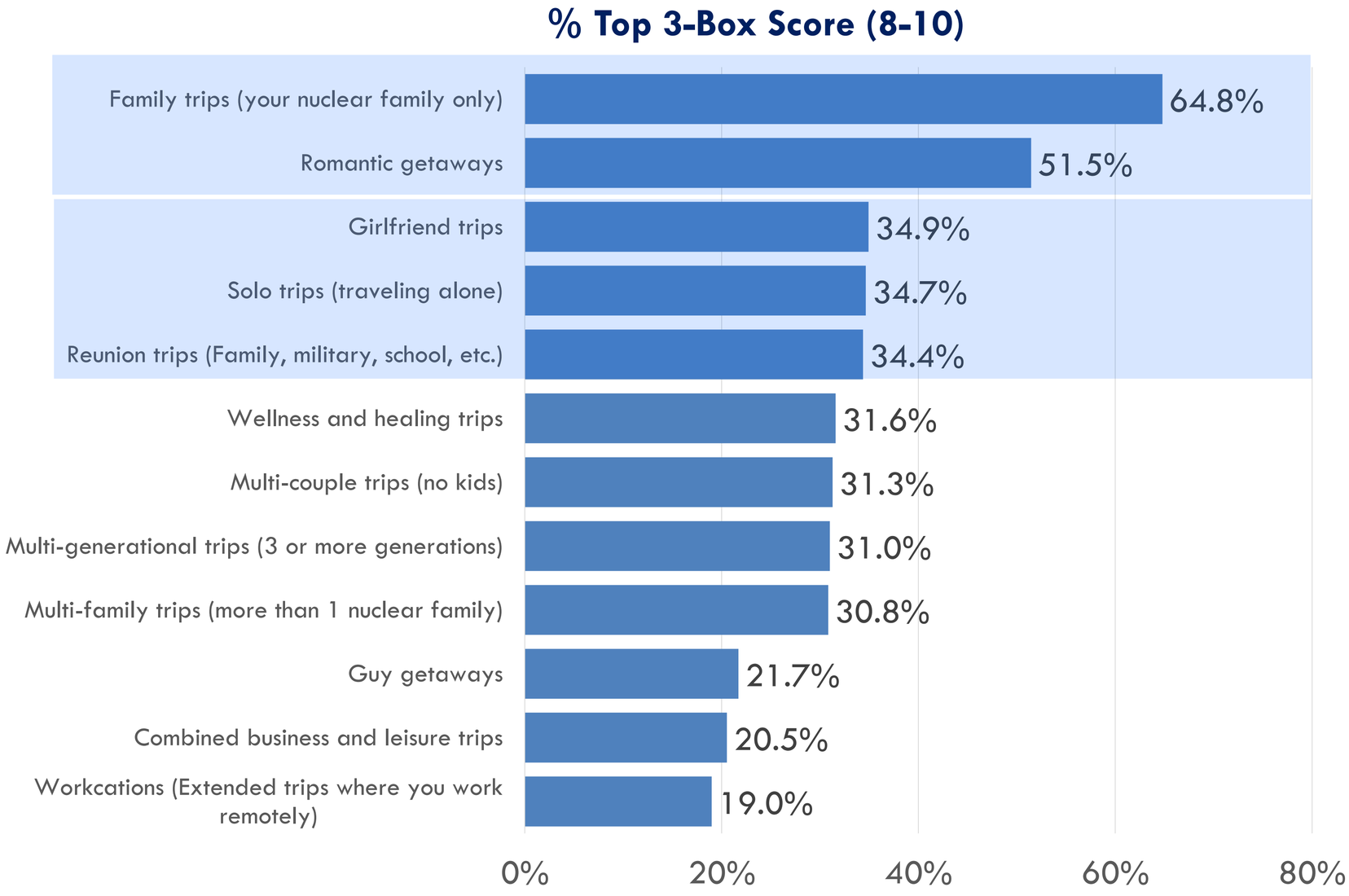
AMERICANS' LEISURE TRAVEL ATTITUDES, IDEOLOGIES + PREFERENCES

EXCITEMENT FOR TRIP TYPES

Question: **Thinking carefully about THE NEXT TWELVE (12) MONTHS.**

Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to take each of these types of trips?

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

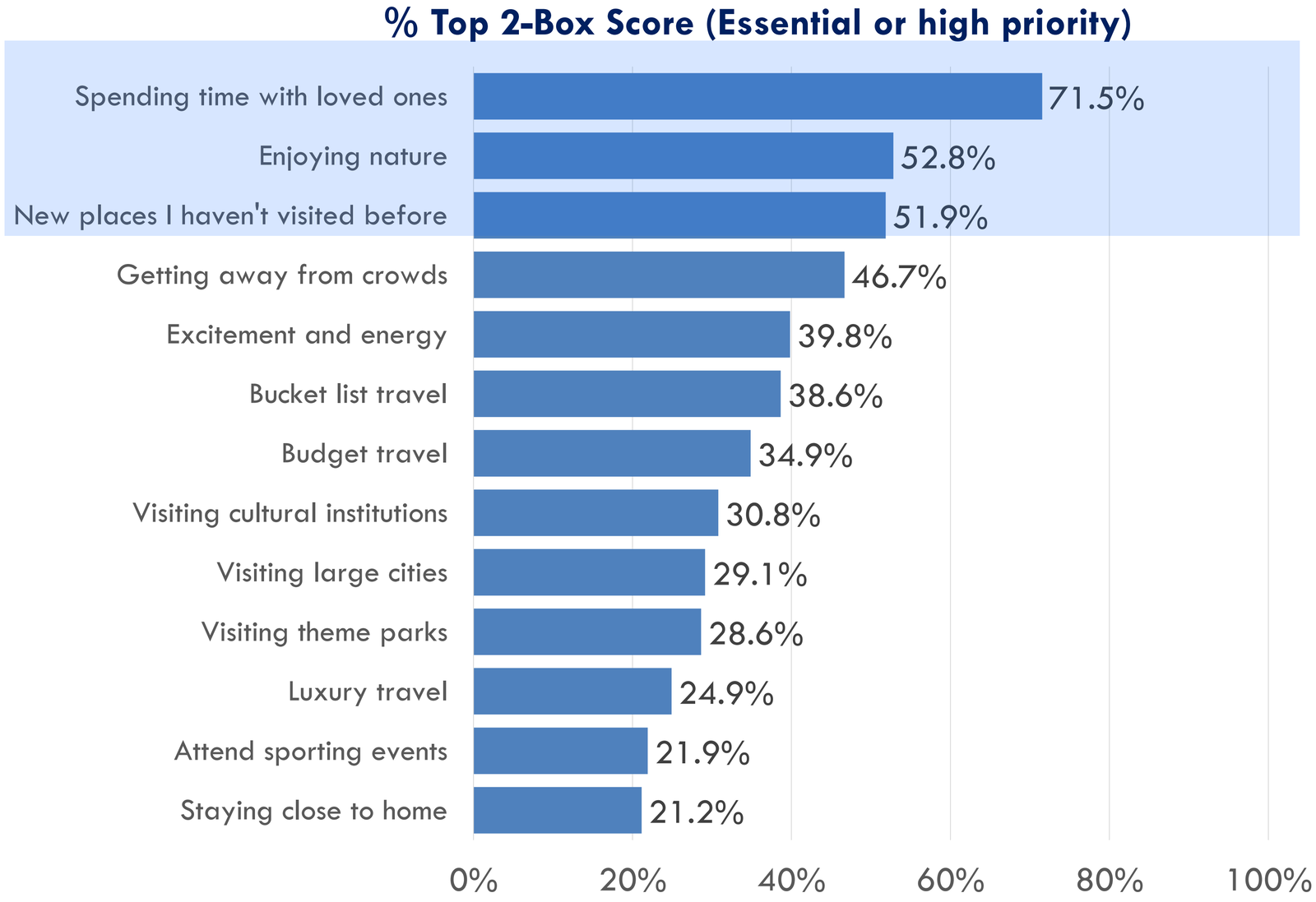


TRAVEL EXPERIENCE PRIORITIES

Question: Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?

However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

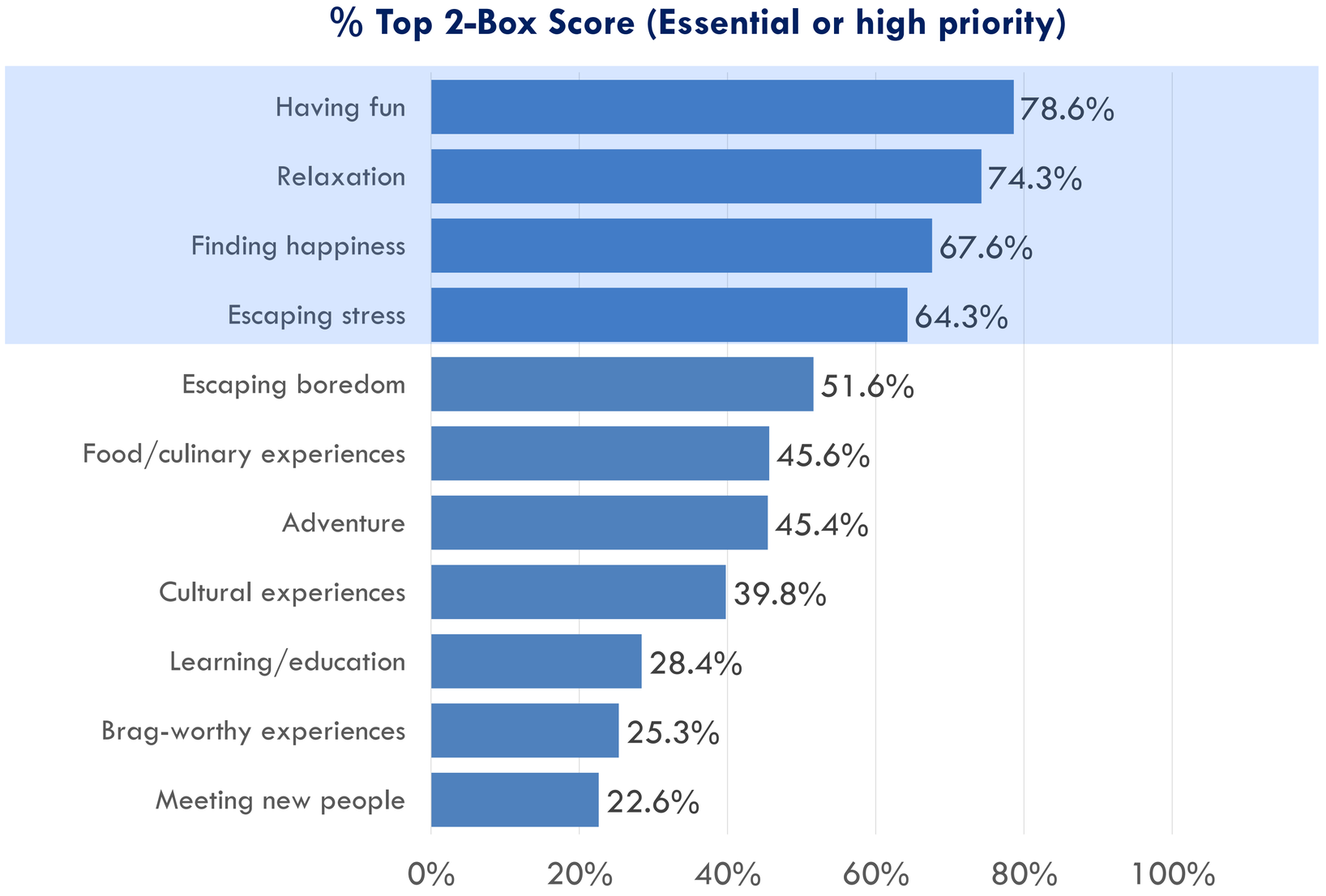


TRAVEL EXPERIENCE PRIORITIES

Question: Continuing this line of thought: Thinking about your travel in the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?

However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

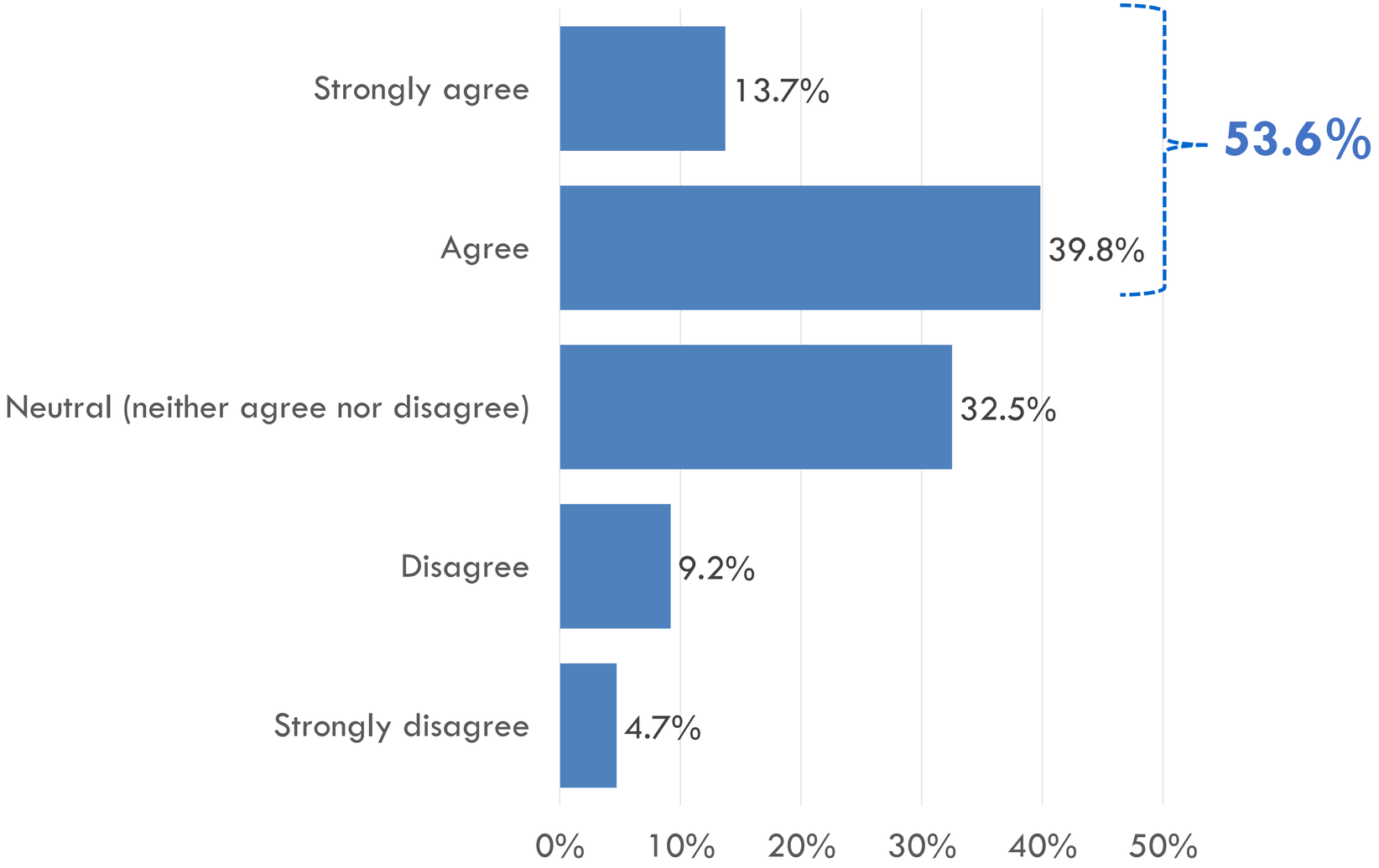


LIMITING PERSONAL ENVIRONMENTAL IMPACT

How much do you agree or disagree with the following statements?

Statement : I usually make an effort to limit my personal impact on the environment when traveling.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

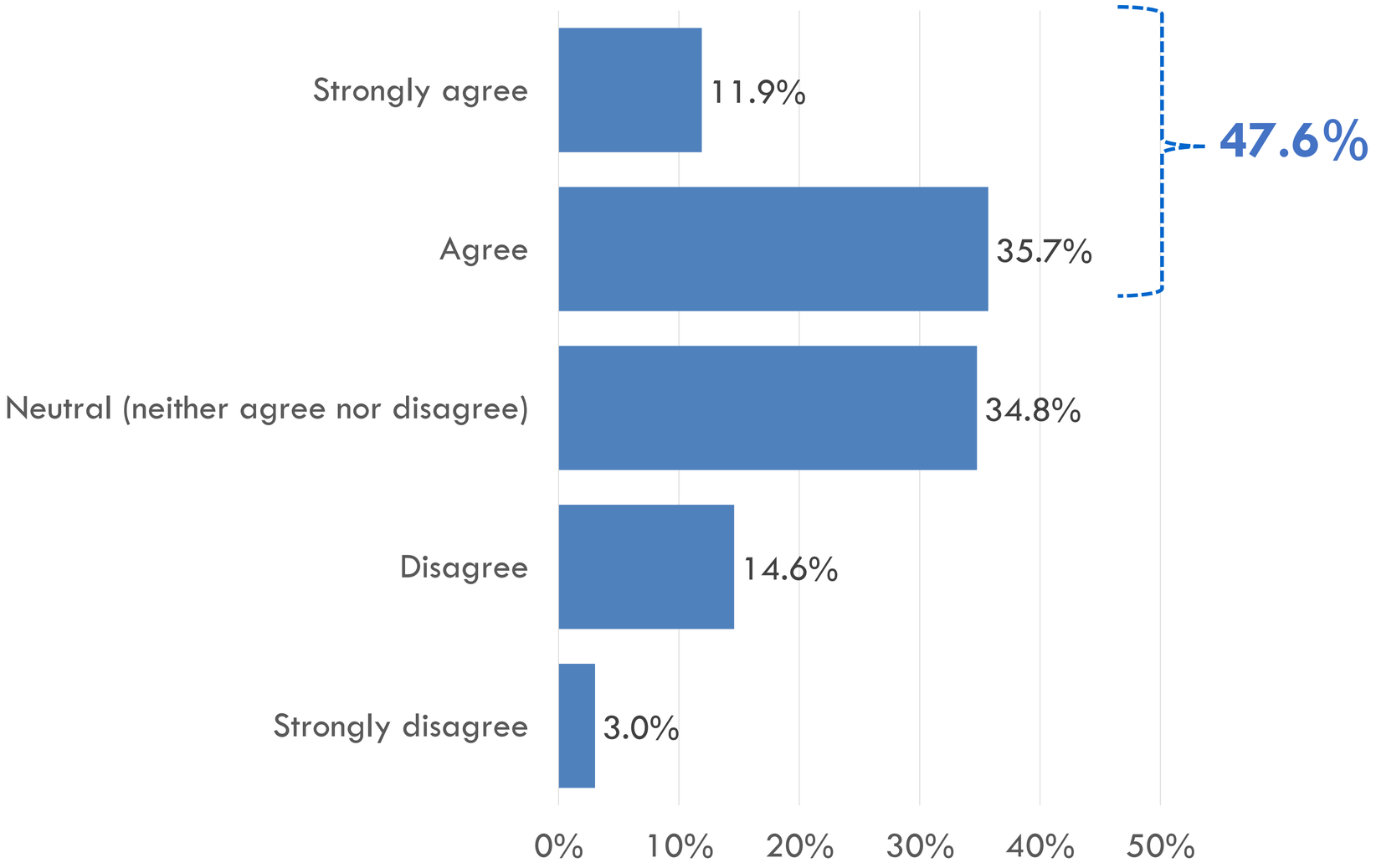


PREFERENCE FOR ACTIVE VACATIONS

How much do you agree or disagree with the following statements?

Statement : I tend to prefer "active time" to "down time" on vacations.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

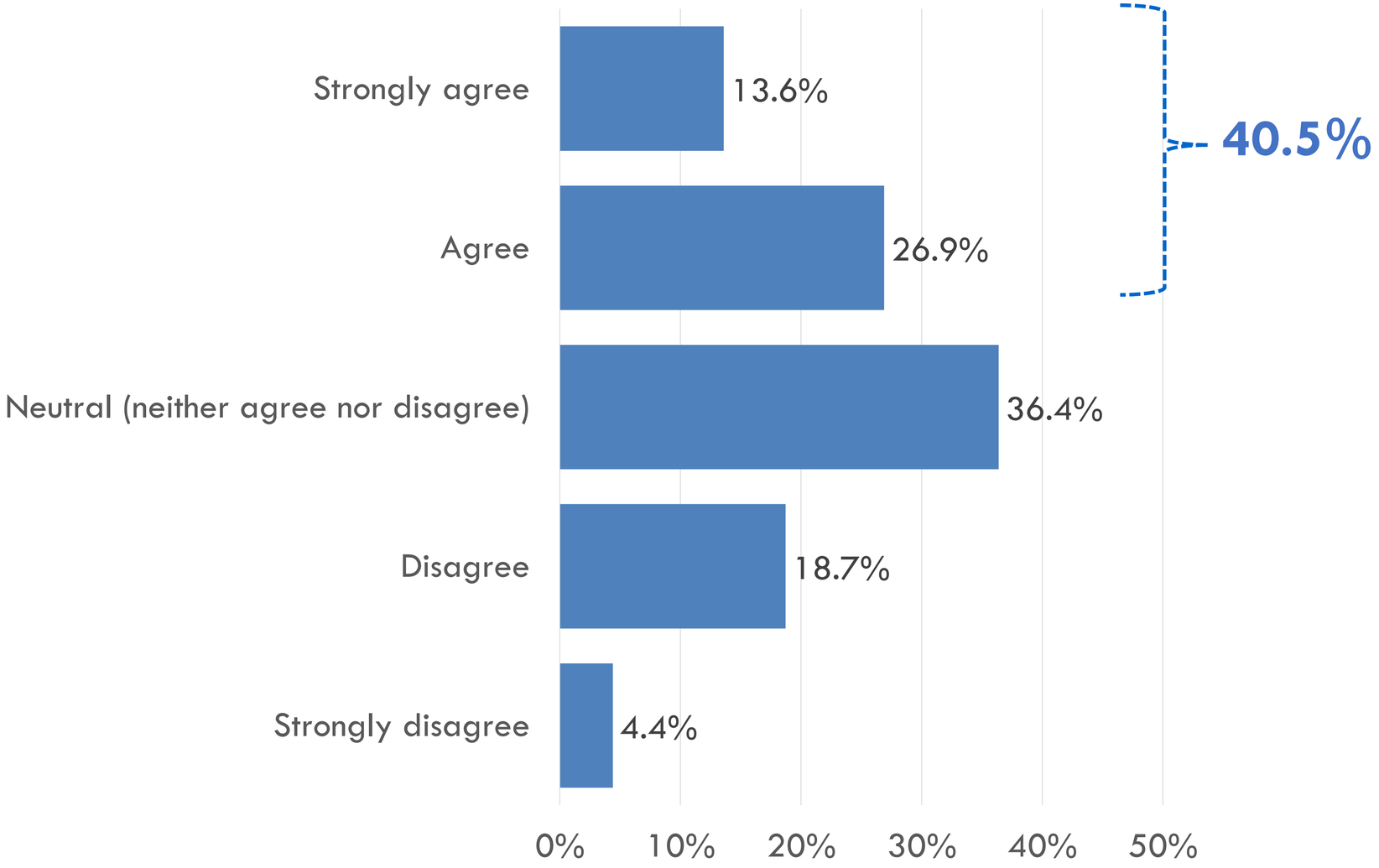


AVOIDING TOURISTY DESTINATIONS

How much do you agree or disagree with the following statements?

Statement : I usually avoid visiting touristy or overdeveloped places.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



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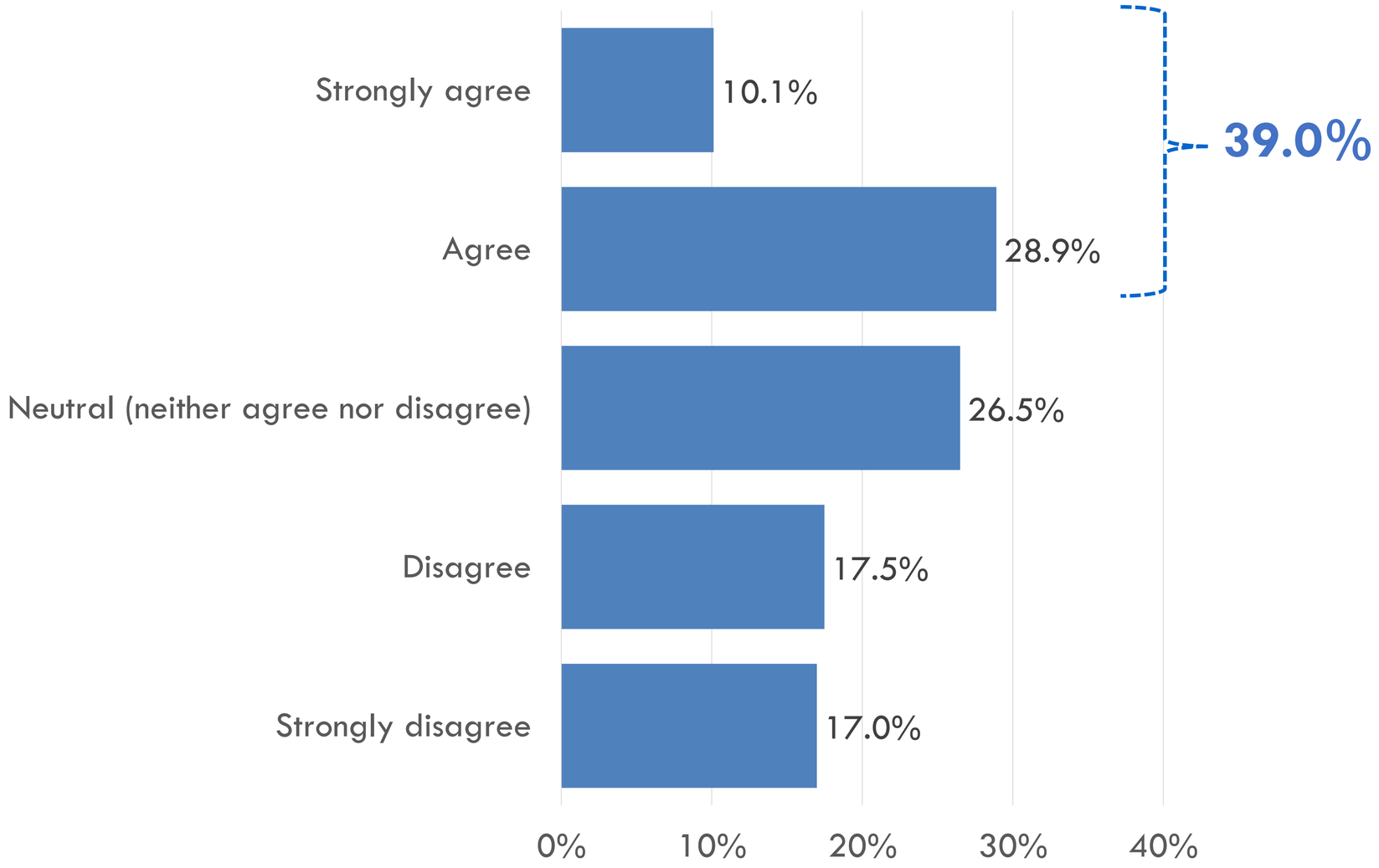
IMPORTANCE OF LUXURY TRAVEL EXPERIENCES

How much do you agree or disagree with the following statements?

Statement: Having luxury travel experiences is usually an important part of my leisure trips.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



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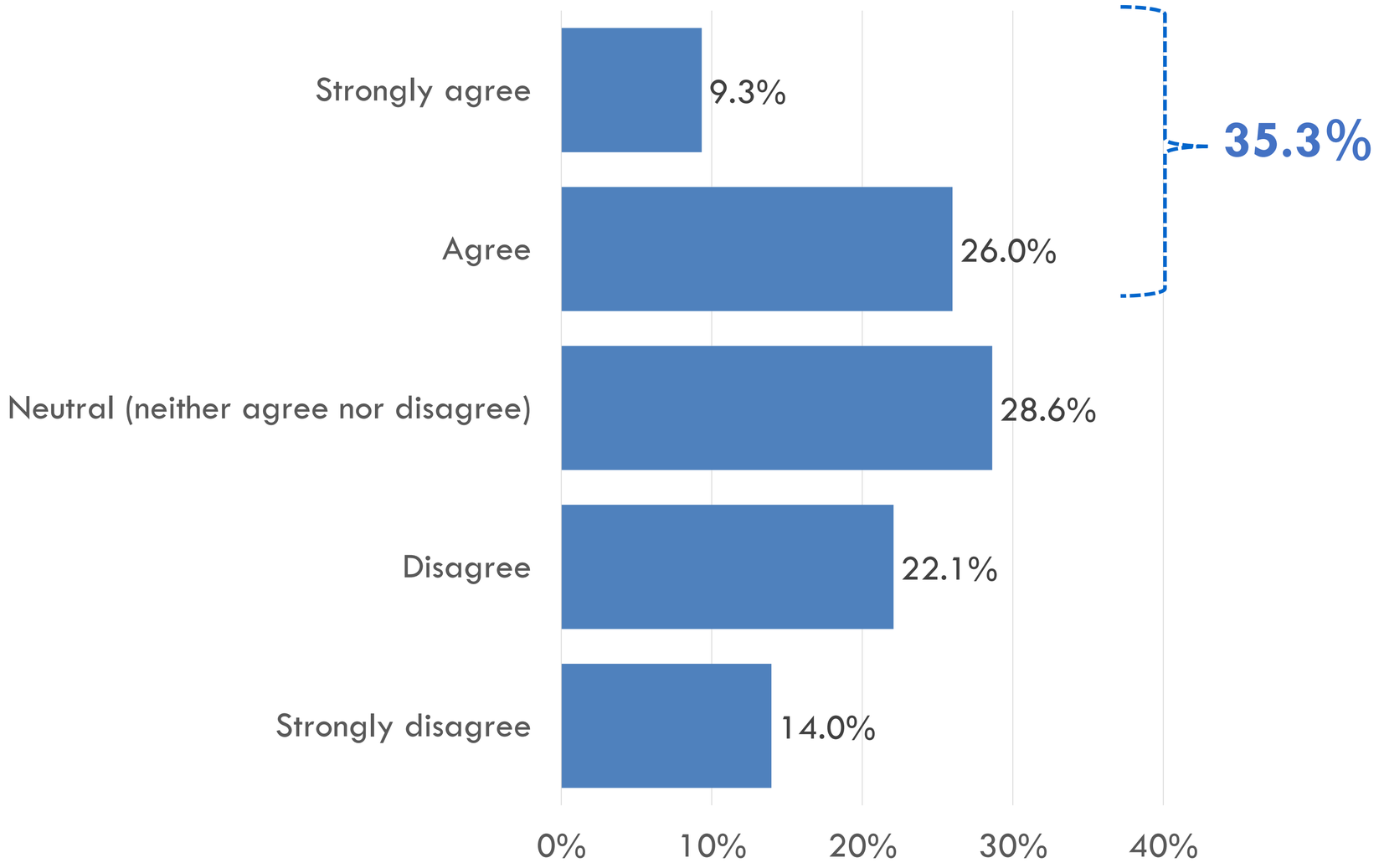
MAKING FRIENDS WHILE TRAVELING

How much do you agree or disagree with the following statements?

Statement : I'm the kind of person that often makes new friends while traveling.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



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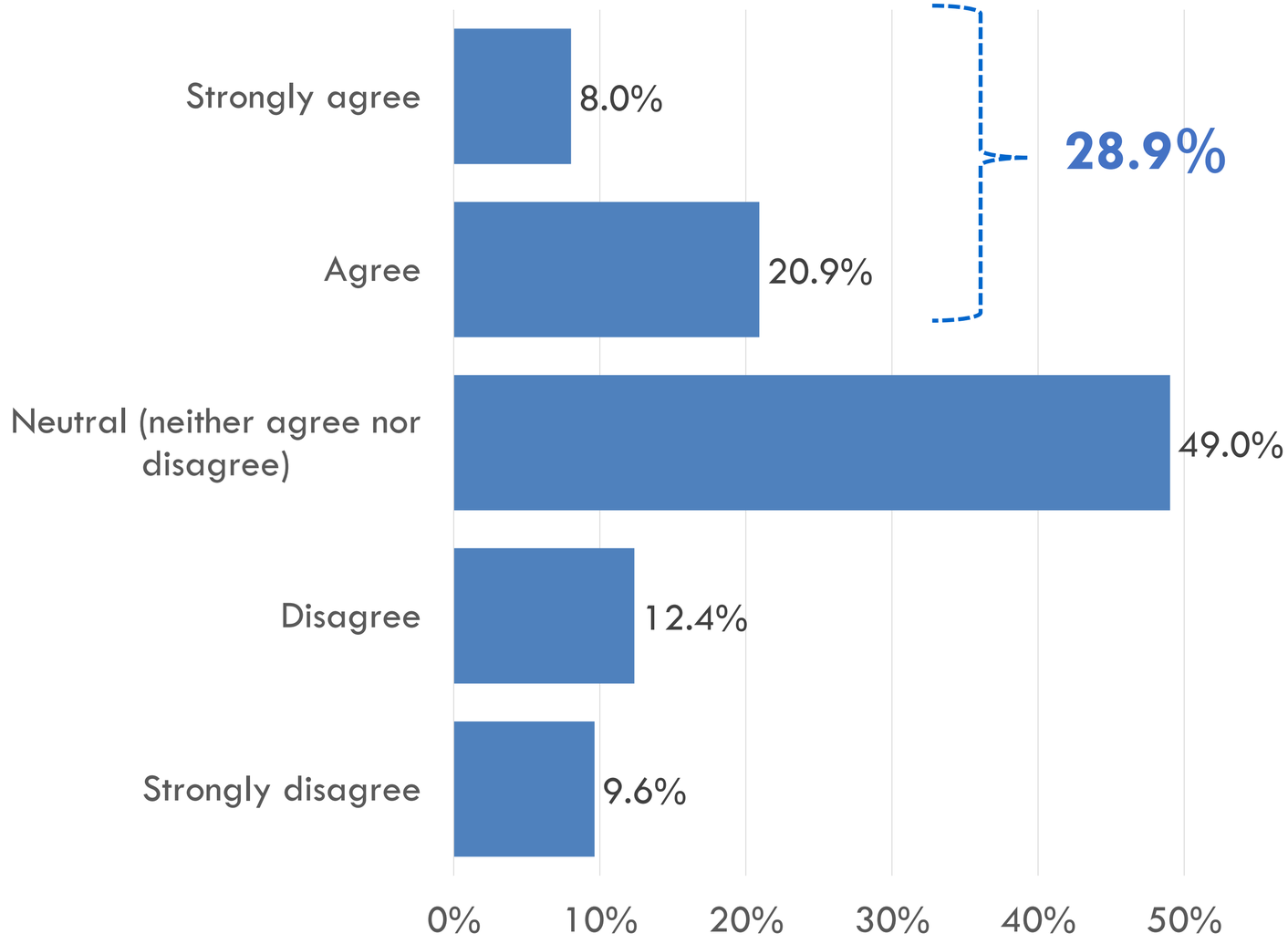
PATRONIZING MINORITY-OWNED BUSINESSES

How much do you agree or disagree with the following statements?

Statement : I usually make an effort to support minority-owned businesses when I travel.

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



WHY + HOW AMERICANS TRAVEL

Question: How much do the following statements describe you?

Please use the 10-point scale where "1" equals "Does not describe me at all" and "10" equals "Describes me completely" to rate how well each statement describes you. Please drag the scale bar to the appropriate number.

(Base: Wave 84 data. All respondents, 1,208 completed surveys. Data collected February 9-11, 2022)

% Top 3-Box Score (8-10)

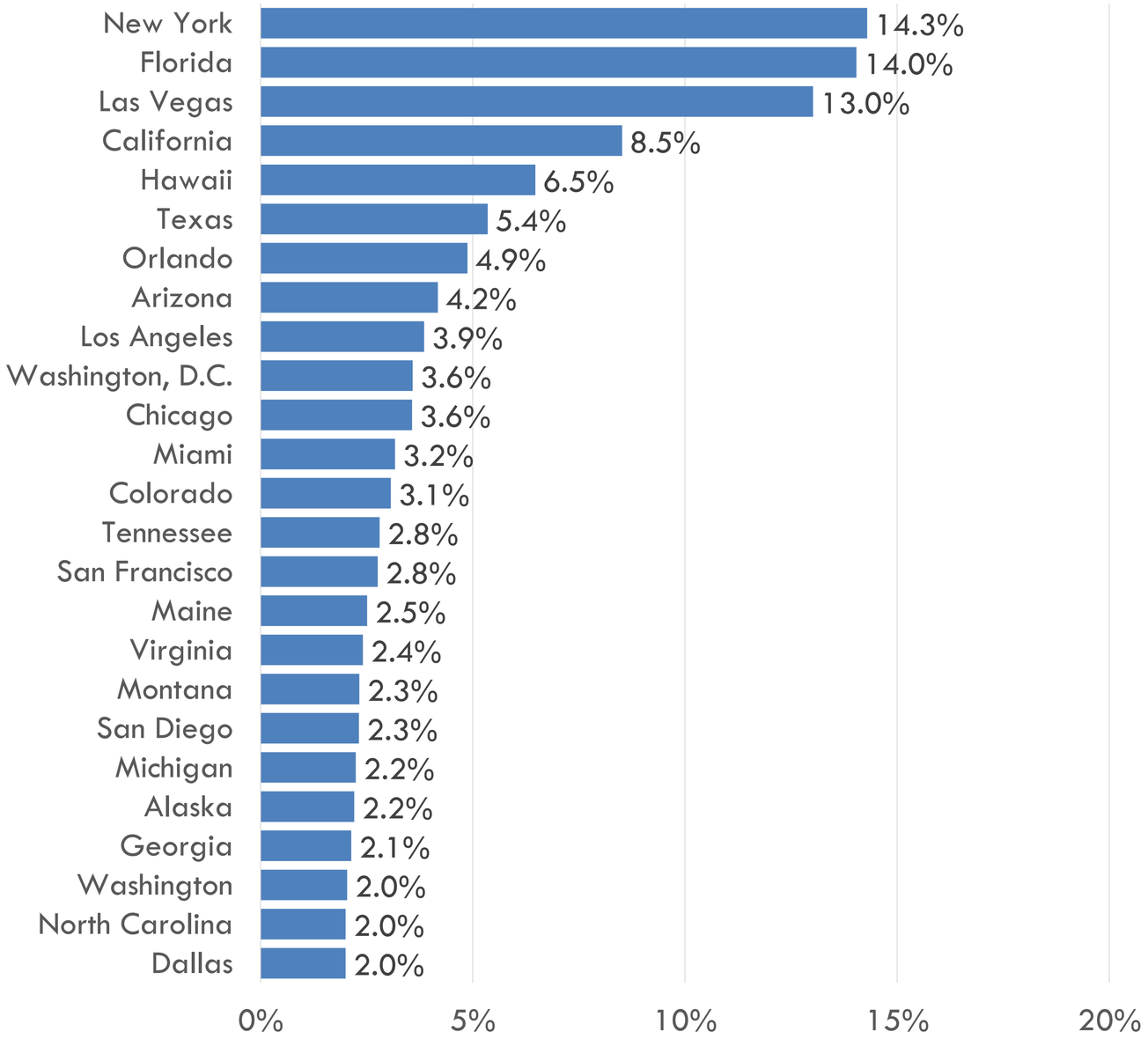
Spending time with my family and making memories with them is important to why I travel	72.1%
Being outside and reconnecting with nature motivates me to travel	52.2%
I travel to open my mind to new cultures and experiences	48.5%
Having experiences where I can really get a sense for the essence and culture of a place is important to me when I travel	46.2%
I prefer active time to down time on vacation	42.6%
I make an effort to support small businesses when I travel	41.9%
I hate very touristy and overdeveloped places	38.6%
I am someone that others seek out for travel ideas and advice	37.5%
I make an effort to support minority-owned businesses when I travel	31.8%
I research the cultural diversity of destinations/locations before I travel there	31.6%
I strongly prefer to travel to places I have been to before	30.7%
I won't vacation in places in which their local political culture is sharply different from mine	25.3%
I feel safer in large cities compared to rural areas	20.8%

MOST DESIRED DOMESTIC DESTINATIONS IN THE NEXT 12 MONTHS (UNAIDED)

Question: Which domestic destinations do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations in the United States)

(Base: Wave 85 data. All respondents, 1,081 completed surveys. Data collected February 23-25, 2022)

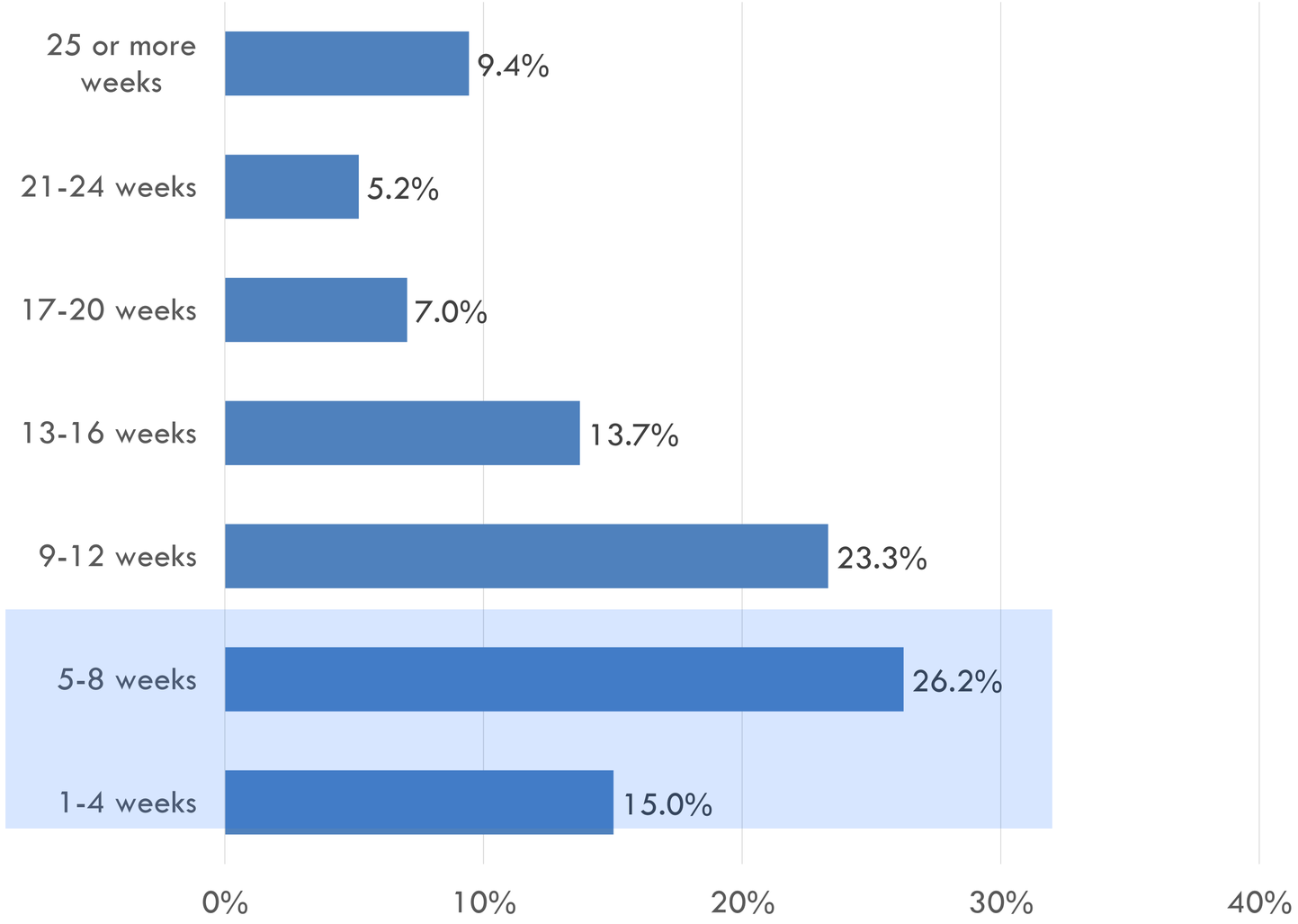


With planning windows still relatively short, Americans are turning to an array of resources to plan

LEISURE TRAVEL PLANNING WINDOW (DOMESTIC TRIPS)

Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



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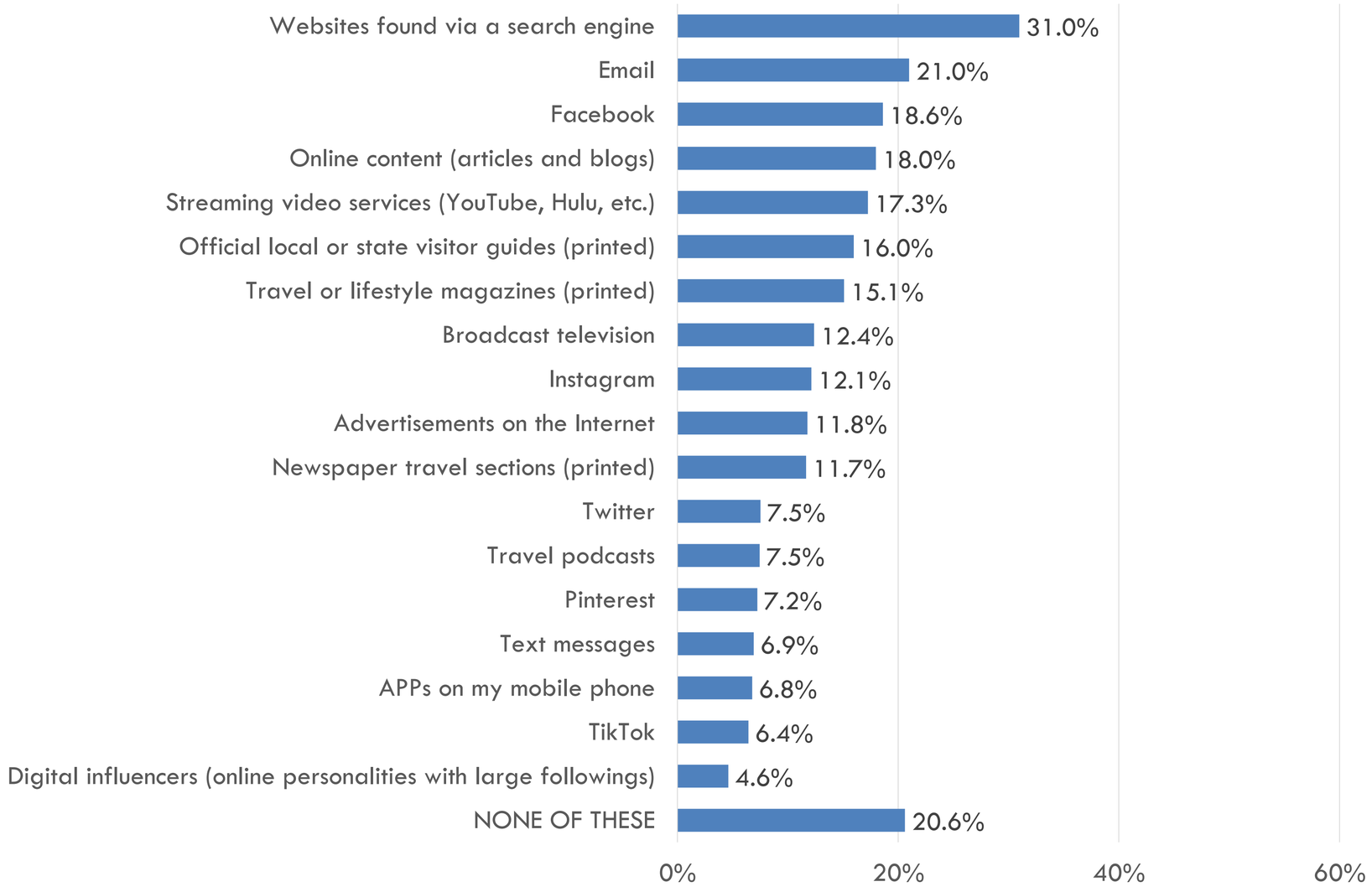
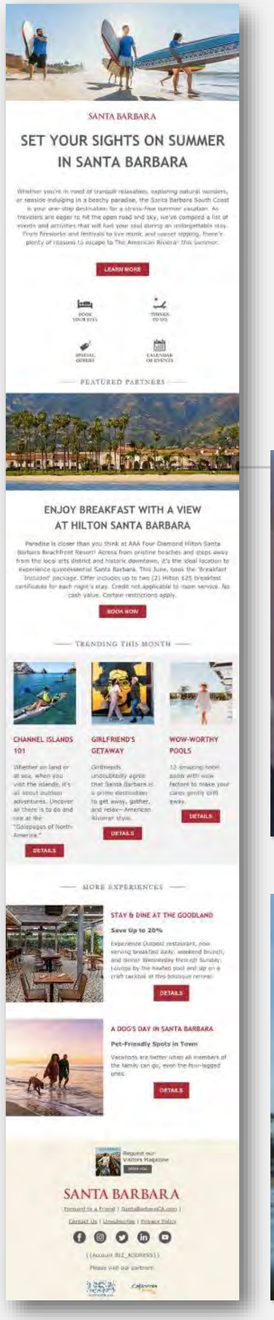
MOST RECEPTIVE CHANNELS

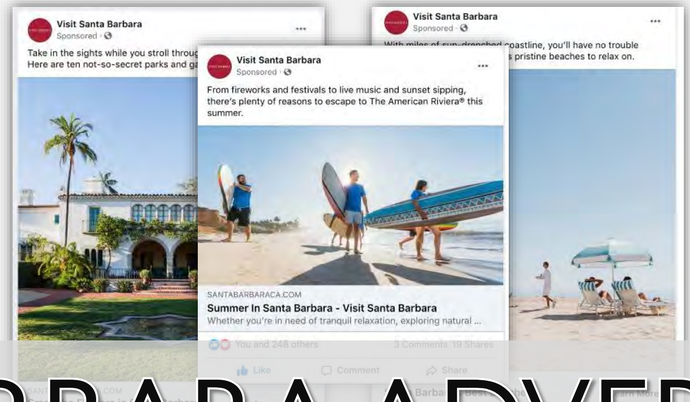
Question: Please think about how travel destinations could best reach you with their messages right now.

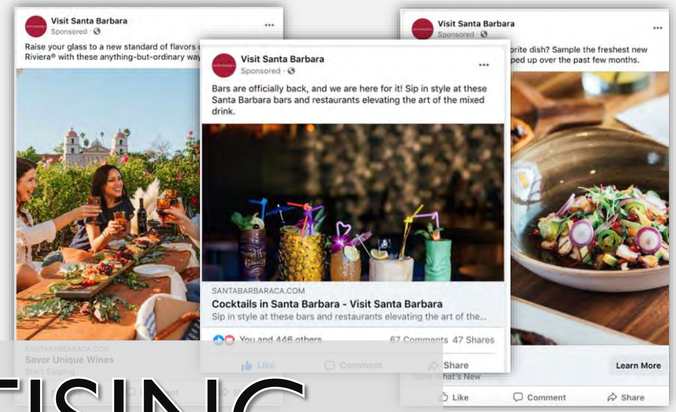
Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

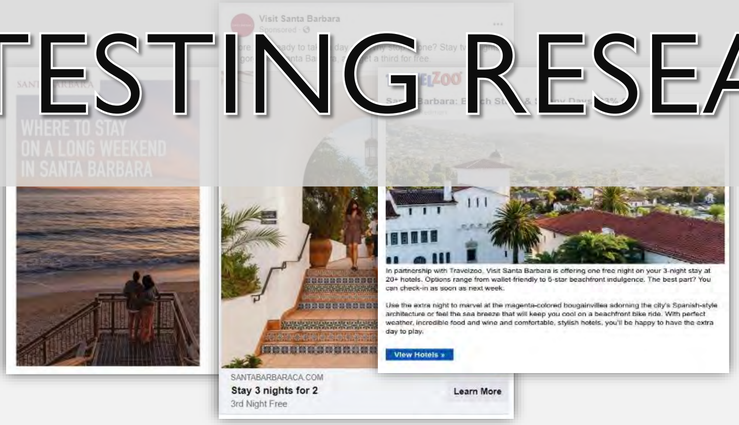
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

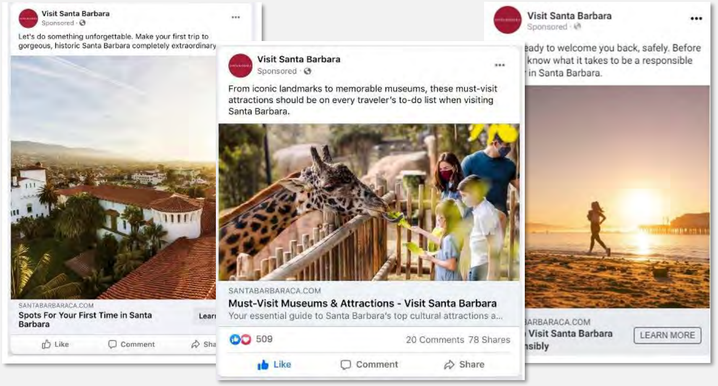












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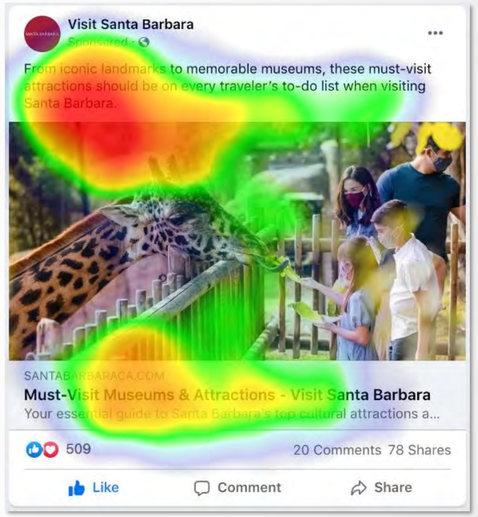
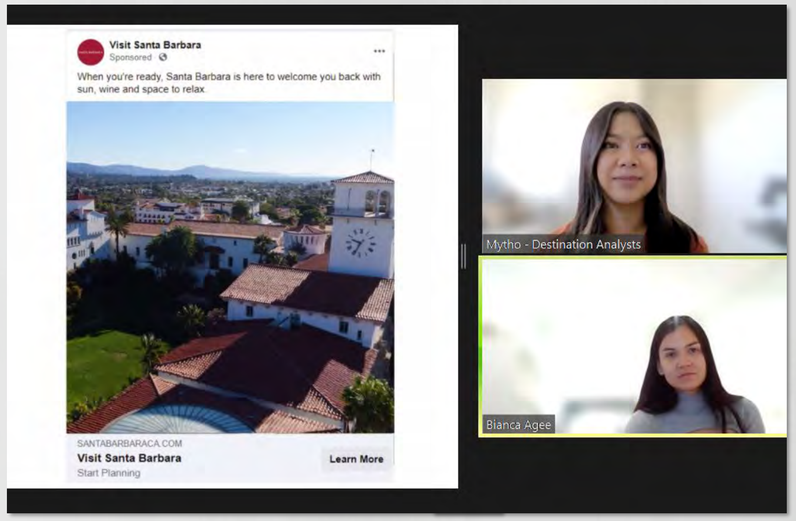
Research Overview

Survey of Leisure Travelers

Ad Interaction & Heat Mapping Assessment



In-Depth Interviews with Leisure Travelers

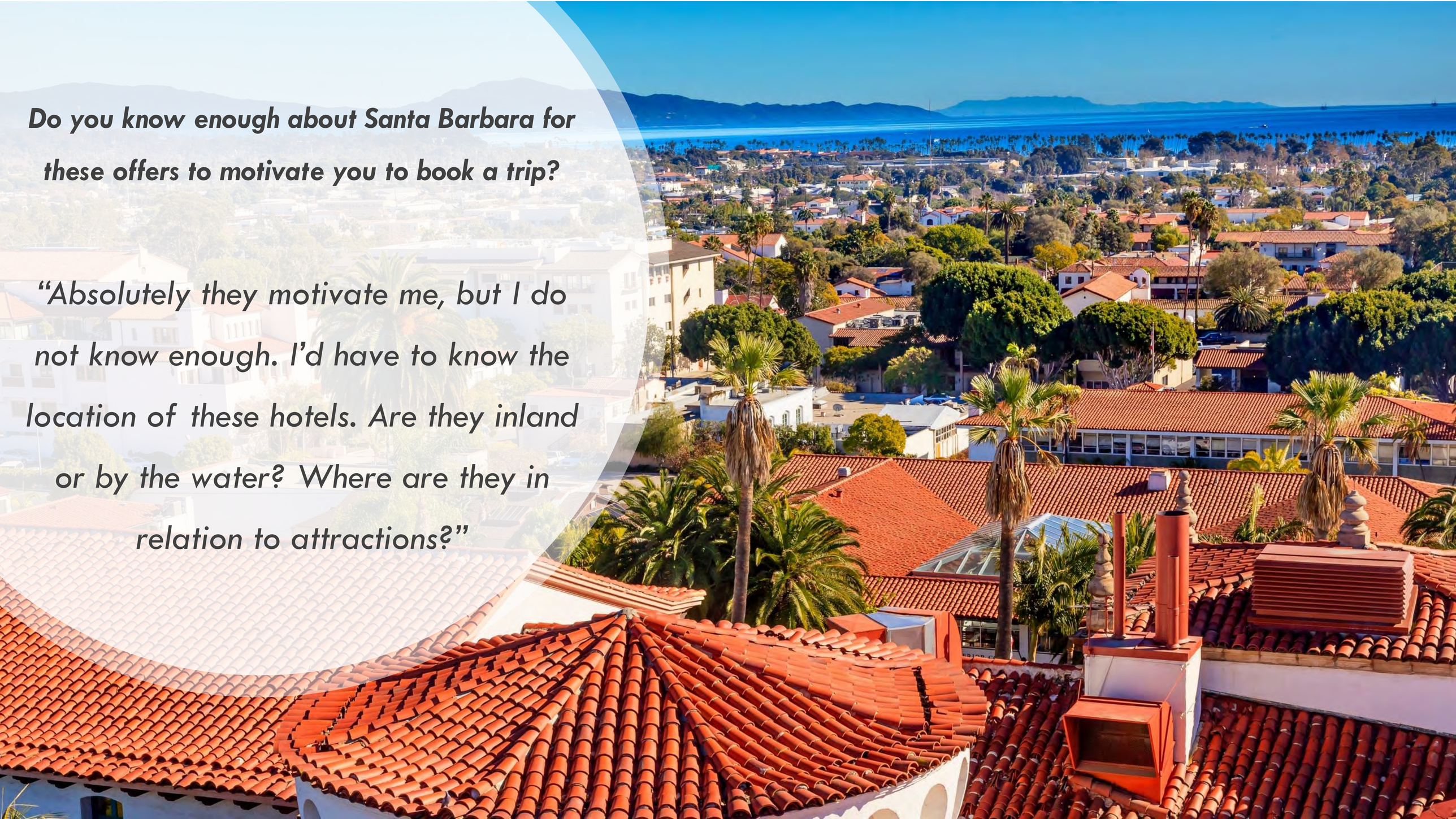


“Shows that Santa Barbara is well orchestrated for lots of enjoyable outdoor activities. Visitors can have an active, healthy lifestyle.”

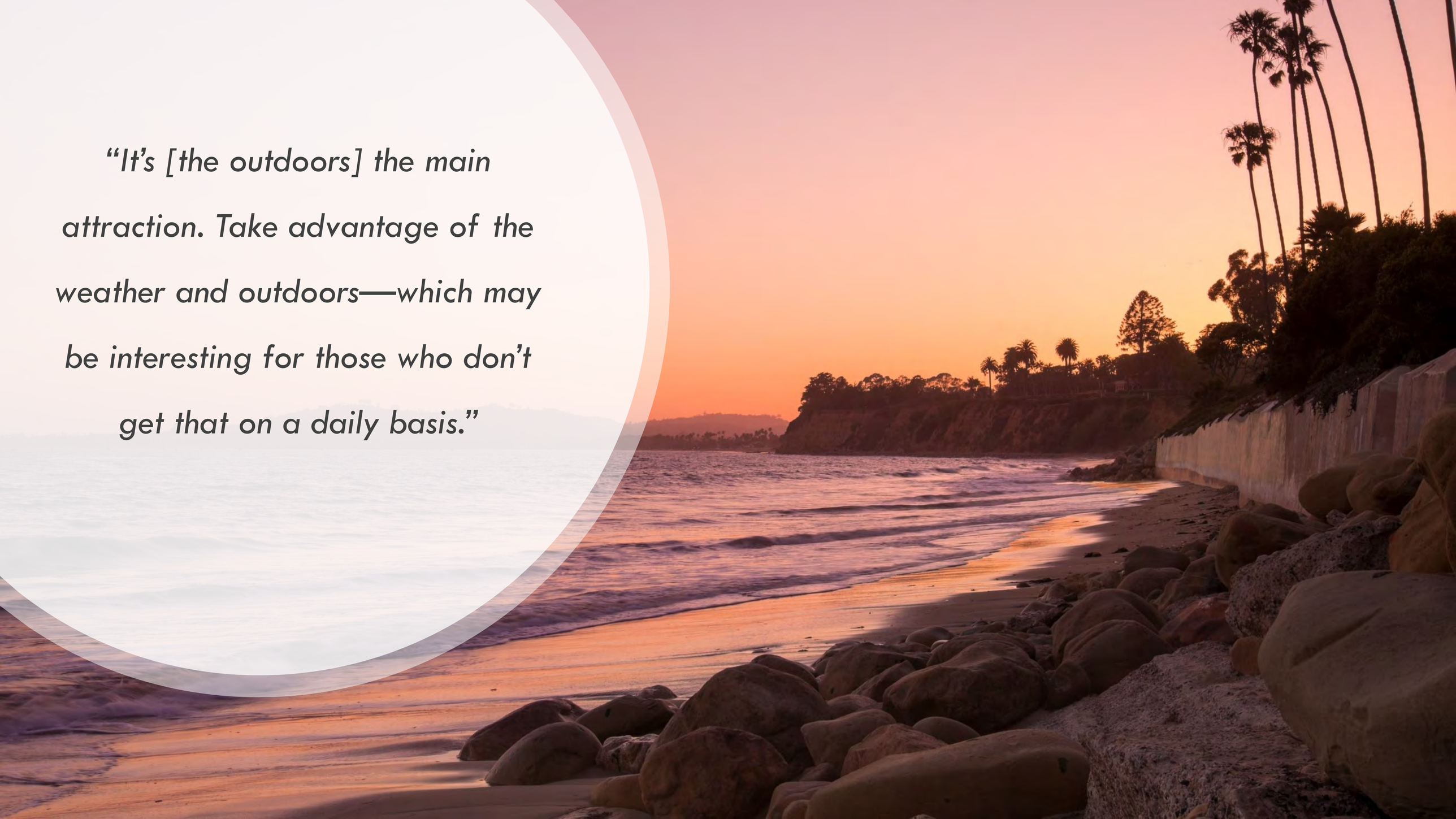
“Text is useful if they’re mentioning a specific place or a recognizable place. Otherwise, there is no value add to having text.”

Do you know enough about Santa Barbara for these offers to motivate you to book a trip?

"Absolutely they motivate me, but I do not know enough. I'd have to know the location of these hotels. Are they inland or by the water? Where are they in relation to attractions?"



“It’s [the outdoors] the main attraction. Take advantage of the weather and outdoors—which may be interesting for those who don’t get that on a daily basis.”



“Understand my value and my dollars. We spend a lot of money on vacation so we are finding that we do make a point to travel to places where there are people that look like us. We want our kids to see everything. Our dollars look the same as everyone else’s.”

“When I choose a vacation destination, my expectation is a variety of activities, a safe environment and more unique kinds of places to visit. Seeing things that are so different than what my life is like.”

SANTA BARBARA SOUTH COAST ADVERTISING BEST PRACTICES

- *When possible, highlight what is New & Unique about the destination or business. Potential travelers seek this information most when deciding where to visit.*

- *Highlight Special Events & Popular Local Businesses (when applicable). This can also help differentiate the Santa Barbara South Coast from other coastal cities.*

- *Continuity of Message is Important. Make sure there is a clear connection between written messages and accompanying imagery.*

- *Mix of Scenic Beauty Shots and People Experiencing the Destination/attraction is Ideal. Showing travelers enjoying the destination adds energy and excitement and allows potential visitors to more easily imagine themselves in the Santa Barbara South Coast.*

- *Imagery of businesses like restaurants should include people. In the covid-era, not seeing people in places where you would expect them to be communicates that the destination/business is not open or not very lively which is seen as a turn off.*

Santa Barbara Geo-Location Stu...
Last published: 14 Mar 22 04:59 PM

Filter | Export | Search... | 68 % | Edit

- Overview and Methodology
- Trip Count by Zip Code
- Trip Count by State
- Segment Profile 1
- Segment Profile 2
- Breakout Tables

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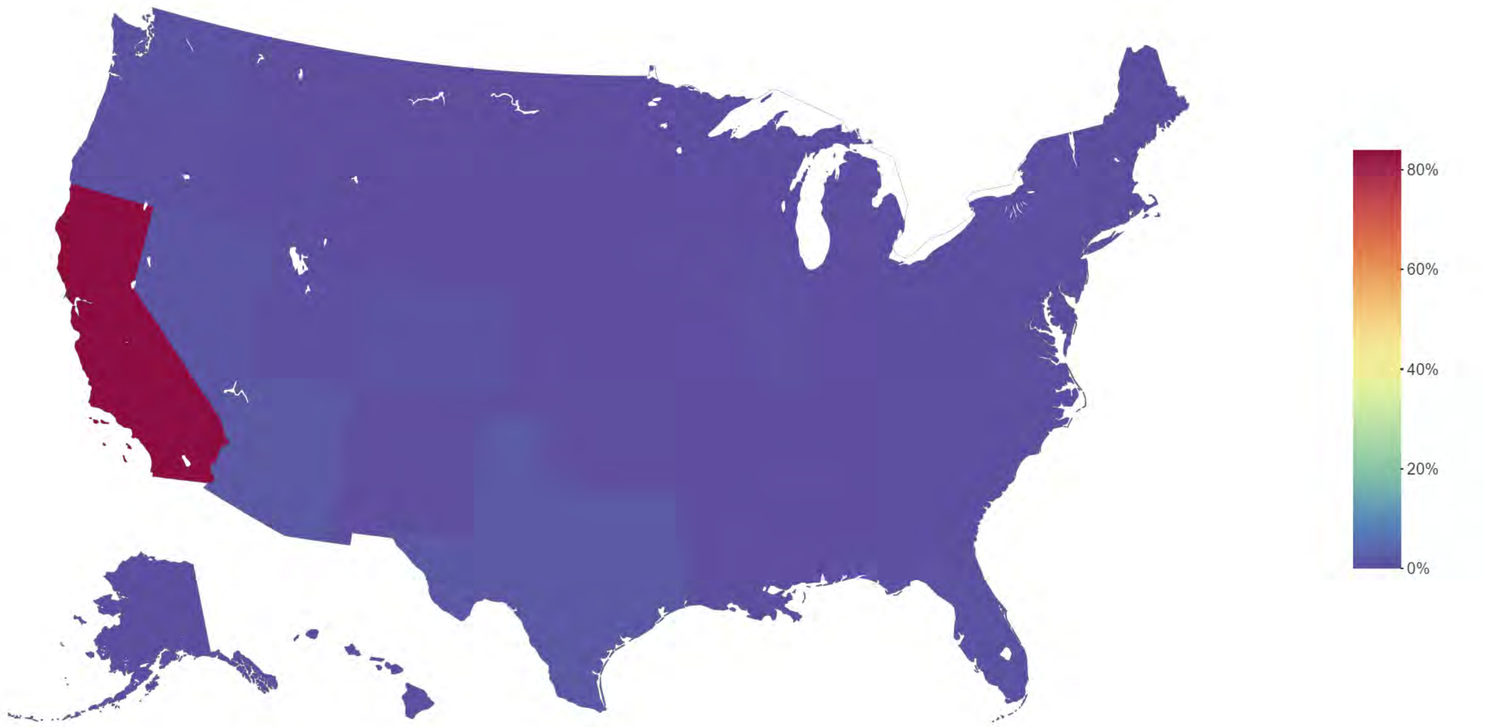
Visit Santa Barbara

Destination Apollo Launch-Pad Geo Location Data Analysis

Last Updated: 3/14/2022

Trip Count by State

	%	n
CA	84.0%	40,784
AZ	1.9%	903
TX	1.9%	906
NV	1.3%	627
WA	1.0%	497
CO	1.0%	498
FL	.9%	458
OR	.7%	330
IL	.6%	286
ID	.3%	146
UT	.5%	244
NY	.6%	280
PA	.3%	154
WI	.2%	111
OH	.3%	142
NC	.3%	131
MO	.2%	105
MI	.3%	127
VA	.3%	127
MA	.2%	114
IN	.2%	86
GA	.3%	132
MD	.2%	93



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Trip Count by Zip Code

	n
93013	1,429
93436	1,332
93003	761
93001	690
93036	488
93030	423
93454	277
93455	444
93010	347
93463	341
93065	257
91362	330
93004	308
93033	240
93427	204
93012	279
93023	321
93060	171
90049	181
91320	218
93063	185
93311	192
93015	113

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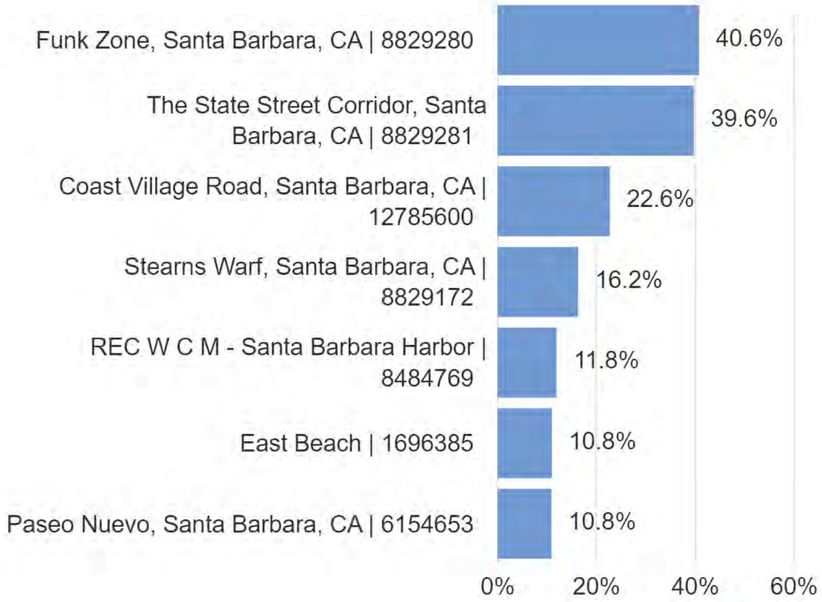
Top Transportation Options:

Top Attractions:



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THANK YOU

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