

# SANTA BARBARA

THE AMERICAN RIVIERA®

## *Executive Summary*



2008

Santa Barbara County Visitors Survey and Economic Impact Study  
By Lauren Schlau Consulting

Santa Barbara Conference & Visitors Bureau and Film Commission  
1601 Anacapa Street, Santa Barbara, CA 93101  
[SantaBarbaraCA.com](http://SantaBarbaraCA.com)

# SANTA BARBARA

THE AMERICAN RIVIERA®

CONFERENCE + VISITORS BUREAU + FILM COMMISSION

The Santa Barbara Conference & Visitors Bureau and Film Commission (CVB), a non-profit 501(c) 6 corporation, is the Destination Marketing Organization (DMO) funded by the City and County of Santa Barbara, and a membership of 260 partnership companies and tourism-related businesses. The mission of the CVB is to “market Santa Barbara County as a destination.” Our goals are designed to enhance the economies of the City and the County through a sustained growth in tourism spending, resulting in a significant increase in economic impact in the areas of earnings, tax collections, and jobs. Bureau challenges include brand development, analysis and implementation of market outreach and impact assessment.

The CVB conducts extensive market analysis including surveys, focus groups and research and employs the data in its marketing plan, branding campaign, and sales efforts. The research is also used by a wide variety of Santa Barbara County businesses in their efforts to understand their particular markets and attract new business. This research should be periodically updated to include shifts in patterns and market changes as well as to track and evaluate previous research-based decisions and outcome. The last visitor survey was performed by the CVB in fiscal year 2003-2004.

The 2008 Santa Barbara County Visitor Survey was conducted to obtain comprehensive data about visitors and the economic impact of tourism.

The objectives of this survey are to serve as

1. a reference document from which to pinpoint marketing strategies designed to meet targeted niche market segments
2. a comprehensive market planning document from which to develop a 3-5 year strategic marketing direction and overall
3. plan an evaluation/accountability tool for measuring impact and progress toward strategic marketing goals
4. a comparative tool to identify trends that have taken place since the 2003-2004 survey.

The 2008 Survey also points to specific market segments to target in order to increase tourism spending, while minimizing increases in numbers of actual visitors. These markets include long-haul U.S. and international travelers. The CVB’s integrated marketing plan will incorporate these key findings in the programs to be developed by all departments.



April, 2009

Kathy Janega-Dykes  
President & CEO  
Santa Barbara Conference & Visitors Bureau and Film Commission  
1601 Anacapa Street  
Santa Barbara, CA 93101-1909

Dear Ms. Janega-Dykes:

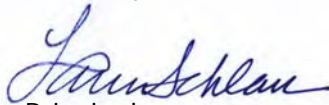
LSC is pleased to present the following Executive Summary of the research results of the Visitor Profile and Economic & Fiscal Impacts of Santa Barbara Tourism for calendar year 2008.

Our findings and conclusions represent tourism activity based on market research conducted in four periods (seasons) during 2008, reflecting then-current market conditions. The results were expanded to represent the entire year, and thus, while not specific measures, reliably reflects the conditions during this period.

Please feel free to contact me at any time should you have any questions, comments or need further interpretation of the results or this report.

We express our appreciation to the Conference & Visitors Bureau for its support and thank you for the opportunity to have assisted you. We wish you success in your use of the study.

Sincerely,

  
Principal

c: Skip Hull, VP CIC Research, Inc.

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## EXECUTIVE SUMMARY OF FINDINGS

### Study Background & Approach

This Study of the Economic and Fiscal Impacts of Santa Barbara Tourism ("the Study") was conducted to provide the Santa Barbara Conference & Visitors Bureau and Film Commission (the Bureau or SBCVB) and other interested parties with accurate and credible estimates of Santa Barbara County tourism volume, its economic and fiscal impacts, and visitor demographics and trip characteristics. The Study covers calendar year 2008.

To gather the base data, the Study consisted of three related surveys, as listed below.

- 1,587 on-site intercept interviews with "visitors" (i.e., non-Santa Barbara County residents) in key visitor locales throughout Santa Barbara city and county, to obtain demographic, trip behavior and spending data.
- 406 Santa Barbara County households were interviewed by telephone to determine the incidence of hosting visitors in their homes and/or referring guests to local hotels, as well as the visitors' demographics and trip behaviors.
- Santa Barbara County transient lodgings were surveyed to determine 2008 room demand, occupancy, average rate and seasonality factors.

Once collected and tabulated, the data served as the basis for the visitor profile, and were input into CIC Research, Inc.'s economic model, generating the estimates of visitor volume, economic and fiscal impact and related employment.

### Summary of Results

#### Visitor Volume and Visitor Days

- In 2008, Santa Barbara County overall attracted 8.2 million visitors.<sup>1</sup>
  - Total visitor volume was slightly higher in Santa Barbara city at 5.7 million versus 5.3 million in the county areas.
- Overall, visitors spent an average of 1.4 days anywhere within Santa Barbara County, generating 19.4 million total visitor days.
  - County area visitors (i.e., outside Santa Barbara city) stayed about one day longer, 2.6 days, versus 1.4 days for Santa Barbara city visitors, due to the presence of more private residence and other paid lodging guests who have

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<sup>1</sup> California Tourism reports 10.5 million annual visitors countywide in 2006. Differences are due to definition and the study year. The State counts a visitor as taking a trip of 50 + miles, which would include some Santa Barbara County residents. This study excludes Santa Barbara County residents regardless of trip distance.  
Note: throughout this report, Santa Barbara County or "countywide" refers to all areas within Santa Barbara County, "county areas" refers to areas outside Santa Barbara city, and City refers to Santa Barbara City itself.

long stays. As a result, they generated substantially more visitor days, 13.6 million in county areas, compared to 7.7 million days in Santa Barbara city.

- Overall each visitor group spent an average of \$700 during their visit or \$84 per-person per-day in Santa Barbara County, generating total direct spending of \$1.59 billion for the year.
  - Per-person daily spending was \$79 in the city and nearly \$72 in county areas. It is higher on an overall basis, \$84 due to the fact that visitors spent in both areas (and therefore is not an average of the two areas).
- With more visitor days, county area visitors spent \$977 million, or 61.5% of the total, versus \$612 million or 38.5% in Santa Barbara City, as shown in Table 1.

**Table 1 - Summary of Overall Visitor Indicators for 2008**

Measure	Total Countywide	SB City	SB County
Total visitors*	8,242,500	5,684,000	5,286,300
Average length of stay – all visitors (days)	2.4	1.4	2.6
Total visitor days*	19,444,500	7,741,900	13,652,600
Average daily spending per-person	\$83.98	\$79.06	\$71.61
Total Annual Direct visitor spending	\$1,589,760,000	\$612,100,000	\$977,700,000
Direct Spending Ratio	100.0%	38.5%	61.5%
Total Direct + Indirect Visitor Spending**	\$2,164,530,000	\$795,730,000	\$1,368,800,000

\* SB City and SB County visitors and visitor days cannot be added to equal the Total Countywide as some visited both areas. However SB City and SB County spending can be added to equal the Total Countywide.

\*\* Indirect total spending results by multiplying City direct spending by a 1.3 multiplier and County direct spending by a 1.4 multiplier.

Source: CIC Research, Inc. and Lauren Schlau Consulting.

More insight is provided when looking at the results by visitor lodging type, as follows.

- Overnight visitors anywhere in Santa Barbara County totaled 3.1 million visitors or 39% of the 8.2 million total visitor volume. Of the overnight visitors within Santa Barbara County:
  - 1.57 million visitors or 19% were staying in hotels/motels/inns.
  - 1.04 million or about 13% were guests staying in private residences.
  - 544,400 or 7% stayed in other paid lodging that included RV and tent camp sites, guest homes, or timeshares (not specifically identified in the survey).
- Day visitors were the largest single segment at 5.1 million or 61% of the total.

The impact of length of stay is reflected in visitor days.

- Hotel guests, staying an average of 3.76 days, generated 5.9 million visitor days or 30% of the 19.4 million visitor days, the most of any segment.

- Next are private residence guests who stayed an average of 5.3 days and accounted for more than 5.5 million visitor days or 29% of the total.
- Due to their one-day stay, day visitors accounted for 5.0 million visitor days or 26% of total visitor days, only third highest.
- Finally, other lodging guests, who stayed the longest at 5.34 days, accounted for 2.9 million visitor days or 15% of the total, as shown below in Table 2a.

**Table 2a - Summary of Countywide Tourism Volume - 2008**

Visitor Segment	Number of Visitors		Persons Per Group	Number of Visitor Days*		Days in SB
	Number	Ratio		Number	Ratio	
Hotel	1,569,157	19.0%	2.89	5,902,985	30.4%	3.76
Private Home	1,047,227	12.7%	2.76	5,551,102	28.5%	5.30
Other Paid Lodging	544,406	6.6%	4.01	2,908,738	15.0%	5.34
<b>All overnight</b>	<b>3,160,790</b>	<b>38.3%</b>	<b>2.98</b>	<b>14,362,825</b>	<b>73.9%</b>	<b>4.38</b>
Day Visitors	5,081,720	61.7%	4.18	5,081,720	26.1%	1.00
<b>Total</b>	<b>8,242,510</b>	<b>100.0%</b>	<b>3.62</b>	<b>19,444,546</b>	<b>100.0%</b>	<b>2.36</b>

Source: CIC Research Inc., economic impact model

\*Visitor days are calculated by multiplying the number of visitors by their length of stay (days).

However, there are key differences when looking at the results by Santa Barbara city versus county areas, as discussed below and shown in Tables 2b through 2e.

- In terms of **visitor volume**, both areas had about the same *overall* visitor party size, however by lodging segment, Santa Barbara city visitor groups were smaller than for those in the county areas, except for day (no lodging) visitors.
- Thus, due primarily to day visitors, Santa Barbara city had more overall visitors, 5.68 million versus 5.29 million in the county areas.
- The overnight visitor ratio was 18.1% in the city versus 45.4% in county areas, mainly due to private residence and other paid lodging guests in the county areas.
- Another factor effecting volume is visitor group size. While comparable overall at nearly 4 per group, overnight groups are larger in county areas, 3.21 versus 2.51 in SB city. The larger group size, shown in the Persons Per Group column in Table 2b, as well as group type (alone or traveling with other adults or children), impacts lodging volume in the city and county areas also shown below.

**Table 2b – Total Visitor Volume - Santa Barbara City vs. County Areas**

Visitor Segment	Santa Barbara City		Santa Barbara County Areas		SB City	SB County Areas
	Visitor Volume		Visitor Volume		Persons Per Group	
	Number	Ratio	Number	Ratio	Number	Number
Hotel	758,841	13.4%	998,517	18.9%	2.63	3.10
Private Home	227,312	4.0%	875,014	16.6%	2.19	2.94
Other Paid Lodging	39,840	0.7%	525,832	9.9%	2.44	4.14
<b>All Overnight</b>	<b>1,025,993</b>	<b>18.1%</b>	<b>2,399,363</b>	<b>45.4%</b>	<b>2.51</b>	<b>3.21</b>
Day Visitors	4,658,014	81.9%	2,886,984	54.6%	3.95	3.77
<b>Total</b>	<b>5,684,007</b>	<b>100.0%</b>	<b>5,286,347</b>	<b>100.0%</b>	<b>3.58</b>	<b>3.50</b>

- If day visitors are removed from the calculations to look at overnight only visitors, Santa Barbara city actually had a far higher ratio of hotel visitors, 74.0% versus 41.6% for county areas as shown in Table 2c.

**Table 2c – Comparison of Overnight Visitor Volume – Santa Barbara City vs. County Areas**

Visitor Category	SB City		SB County Areas	
	Overnight Visitors	Ratio	Overnight Visitors	Ratio
Hotel Guests	758,841	74.0%	998,517	41.6%
Private Home/Other Unpaid Lodging	227,312	22.2%	875,014	36.5%
Other Overnight Paid Lodging Visitors	39,840	3.9%	525,832	21.9%
<b>Total Overnight Visitors</b>	<b>1,025,993</b>	<b>100.0%</b>	<b>2,399,363</b>	<b>100.0%</b>

- In terms of **visitor days**, the *overall* stay is about one day less in Santa Barbara city, 1.36 days versus 2.58 for the county areas, again mainly due to more day visitors in the city and more private residence and other paid guests in the county areas.
- As well, Santa Barbara city visitors reported shorter stays than the county areas for each lodging segment except other paid lodging.
- Thus, due primarily to segment mix and length of stay, Santa Barbara county areas received over 50% more visitor days, 13.65 million than the 7.74 million days in the city.
- But as well, the ratio of overnight visitor days was 40% in the city (versus 19% of its visitors being overnight), while it was nearly 80% in county areas (versus 45% of its visitors being overnight).

**Table 2d - Visitor Days - Santa Barbara City vs. County Areas**

Visitor Lodging Segment	Santa Barbara City Visitor Days		County Areas Visitor Days		Days Stay in SB	
	Number	Ratio	Number	Ratio	City	County Areas
					Number	Number
Hotel	1,794,224	23.2%	4,139,455	30.3%	2.36	4.15
Private Home	1,076,119	13.9%	4,394,729	32.2%	4.73	5.02
Other Paid Lodging	213,566	2.8%	2,231,384	16.3%	5.36	4.24
<b>All overnight</b>	<b>3,083,909</b>	<b>39.9%</b>	<b>10,765,568</b>	<b>78.8%</b>	<b>3.01</b>	<b>4.49</b>
Day Visitors	4,658,014	60.2%	2,886,984	21.1%	1.00	1.00
<b>Total</b>	<b>7,741,922</b>	<b>100.0%</b>	<b>13,652,552</b>	<b>100.0%</b>	<b>1.36</b>	<b>2.58</b>

- If only looking at overnight visitors, Santa Barbara City actually has a far higher ratio of hotel visitor days, 58.2% versus 38.5% for the county areas as shown below.

**Table 2e – Comparison of Overnight Visitor Days**

Visitor Category	SB City		SB County Areas	
	Overnight Visitor Days	Ratio	Overnight Visitor Days	Ratio
Hotel Guests	1,794,224	58.2%	4,139,455	38.5%
Private Home/Other Unpaid Lodging	1,076,119	34.9%	4,394,729	40.8%
Other Overnight Paid Lodging Visitors	213,566	6.9%	2,231,384	20.7%
<b>Total Overnight Visitors</b>	<b>3,083,909</b>	<b>100.0%</b>	<b>10,765,567</b>	<b>100.0%</b>

### Visitor Spending

Santa Barbara visitors spent \$1.59 billion in total direct spending in 2008, that is, \$700 per visitor group for their entire trip in Santa Barbara County, or \$84 average daily per-person. Spending varied by visitor segment, i.e., Santa Barbara hotel guest, private residence guest, other paid lodging guest or a day visitor, as shown in Table 3.

- Each hotel visitor, due to lodging and other costs, spent the most daily, \$151, and in total, an estimated \$924 million accounting for 58% of all visitor spending countywide.
- Private home visitors spent a total of \$357 million, or an average of nearly \$67 per day.
- Guests in other paid lodging spent \$152 million or \$63 per day.
- Thus overnight guests accounted for 90% of the visitor spending countywide.
- Day visitors spent the least, \$31 per-day but generated a sizable \$156 million or 10% of the total spending.

**Table 3a - Visitor Spending in Santa Barbara Countywide by Segment - 2008**

Visitor Segment	Daily Avg. Per-VISITOR Spending	Avg. Trip per GROUP Spending	Total Annual Visitor Spending	Total Spending Ratio
Hotel	\$ 151.42	\$ 1,700.99	\$ 924,320,000	58.1%
Private Home	\$ 66.92	\$ 941.89	\$ 357,830,000	22.5%
Other paid lodging	\$ 63.17	\$ 1,115.87	\$ 151,450,000	9.5%
Day Visitors	\$ 30.73	\$ 128.40	\$ 156,170,000	9.8%
<b>Avg./Total</b>	<b>\$ 83.98</b>	<b>\$ 698.72</b>	<b>\$ 1,589,760,000</b>	100.0%

Source: CIC Research Inc., economic impact model

- As shown below, spending varied by city versus county areas mainly due to the differences in visitor volume discussed above.
- Overall, spending in Santa Barbara City totaled \$612 million, while it was over \$977million in the County areas.
- Per-trip per-visitor group was about 60% higher in county areas, at \$650 compared to \$385 in the city largely due to length of stay resulting from the mix of day versus overnight visitor volume.
- However, on a per-person per-day basis spending is higher in Santa Barbara city at \$79 versus \$72 in the county areas, in part driven by higher spending by hotel guests in the city.

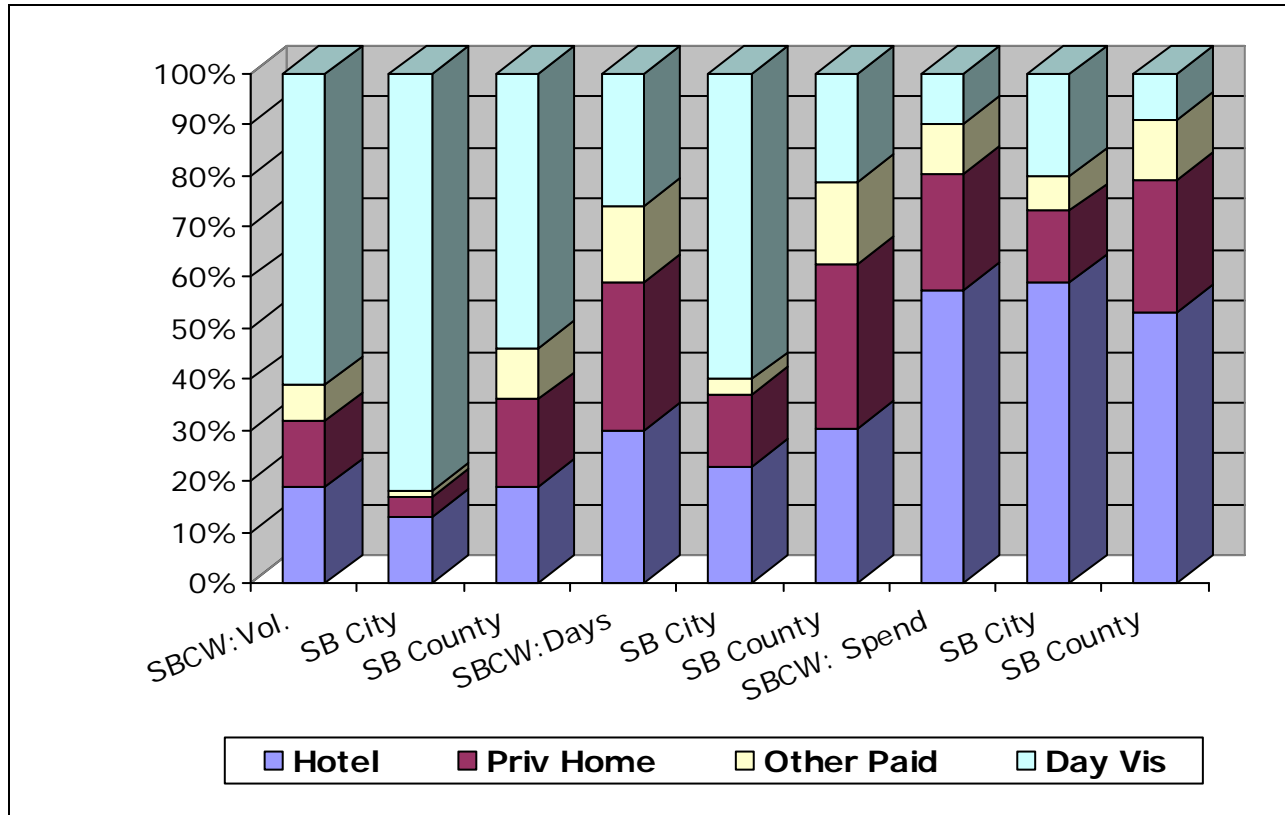
**Table 3b – Visitor Spending in Santa Barbara City & County areas by Segment**

Visitor Segment	Santa Barbara City Spending				Santa Barbara County Areas			
	Daily Avg. Per-Visitor	Avg. Trip per GROUP	Total Annual Visitor	Total Spending Ratio	Daily Avg. Per-VISITOR	Avg. Trip per GROUP	Total Annual Visitor	Total Spending Ratio
Hotel	\$ 201.01	\$ 1,251.97	\$360,650,000	58.9%	\$ 125.97	\$ 1,620.74	\$ 521,450,000	53.3%
Private Home	\$ 79.35	\$ 822.63	\$85,390,000	14.0%	\$ 58.64	\$ 865.04	\$ 257,700,000	26.4%
Other paid lodging	\$ 212.25	\$ 2,776.26	\$45,330,000	7.4%	\$ 50.43	\$ 886.54	\$ 112,520,000	11.5%
Day Visitors	\$ 25.92	\$ 102.26	\$120,750,000	19.7%	\$ 29.80	\$ 112.41	\$ 86,030,000	8.8%
<b>Avg./Total</b>	<b>\$ 79.06</b>	<b>\$ 385.24</b>	<b>\$612,100,000</b>	100.0%	<b>\$ 71.61</b>	<b>\$ 646.69</b>	<b>\$977,690,000</b>	100.0%

Source: CIC Research Inc., economic impact model

Shown below in Exhibit 1 is a comparison of ratios for visitor volume, visitor days and visitor spending by segment and by area.

**Exhibit 1 - Comparison of Santa Barbara Visitor Volume, Days and Spending Ratios by Segment by Area**



**Domestic versus International**

Shown below is a comparison of U.S. resident versus international visitor volume, length of stay, visitor days and visitor spending in Santa Barbara countywide and for the city, and county areas.

**Table 4 - Domestic versus International Volume and Spending**

	SB Countywide		Total SB City		SB County Areas	
	U.S. Domestic	Inter-national	U.S. Domestic	Inter-national	U.S. Domestic	Inter-national
Total Visitors	6,788,002	1,454,507	4,394,961	1,289,046	4,409,372	876,975
Mean Days in SB	2.22	2.67	1.31	1.54	2.54	2.78
Total Visitor Days	15,046,547	3,884,649	5,757,132	1,984,790	11,211,714	2,440,838
Per Capita Daily Spending	\$ 79.55	\$ 101.13	\$ 67.80	\$ 111.72	\$ 71.94	\$ 70.10
Spending Per Trip	\$ 176.33	\$ 270.09	\$ 88.82	\$ 172.02	\$ 182.93	\$ 195.10
Total Spending	\$1,196,930,000	\$392,850,000	\$390,340,000	\$221,750,000	\$806,590,000	\$171,100,000

## Spending by Category

Visitors spent across a range of categories on a countywide basis, as shown in Table 5. The top categories are discussed below.

- Nearly \$426 million, or 27% of total spending was for meals/snacks out; when \$129 million spent on beverages are added to meals, the combined category reaches \$555 million, or 35% of the total.
- Another \$417 million, one-quarter was for paid lodging.
- Retail spending also was strong at \$296 million, or 19% of total visitor spending.

**Table 5 - Visitor Spending in Santa Barbara Countywide by Category – 2008**

Spending Category	% Who Spent in Category	Daily Per-Person*	Total Direct Spending	Category Ratio
Meals/snacks out	72.5%	\$ 22.50	\$ 425,950,000	26.8%
Lodging	19.6%	\$ 22.05	\$ 417,500,000	26.3%
Shopping	30.3%	\$ 15.65	\$ 296,280,000	18.6%
Groceries/incidentals	21.6%	\$ 8.27	\$ 156,490,000	9.8%
Beverages	52.2%	\$ 6.82	\$ 129,090,000	8.1%
Wine Tasting	13.3%	\$ 3.33	\$ 63,050,000	4.0%
Local Transportation	12.5%	\$ 2.16	\$ 40,950,000	2.6%
Admissions	19.4%	\$ 1.58	\$ 29,990,000	1.9%
Other Activities	1.9%	\$ 0.84	\$ 15,810,000	1.0%
Spa/Health/Beauty	0.5%	\$ 0.77	\$ 14,650,000	0.9%
None	5.4%			
<b>Total – who spent</b>	<b>94.6%</b>	<b>\$ 83.98</b>	<b>\$1,589,770,000</b>	<b>100.0%</b>

\* Per-person per day spending includes those not spending in that category.

Retail categories include sales tax; food and beverage categories include sales tax and tips.

## Multiplier

The estimated \$1.59 billion of total Santa Barbara visitor spending represent direct level expenditures. Additional indirect spending accrues from purchases of local goods and services by the local tourism industry and employees spending earnings. The multiplier is estimated at 1.3 for Santa Barbara City and 1.4 for Santa Barbara County. When multiplied by direct visitor spending, an **additional \$574 million** is generated to the local economy, resulting in total direct and indirect spending of **\$2.1 billion**.

## Fiscal/Tax Impacts

Of the total \$1.59 billion visitors spent in Santa Barbara in 2008, excluding non-taxable admissions, transportation, and spa/beauty services, the County earned \$49.9 million in local taxes. Thus, for each dollar visitors spent, the county realized 3.1 cents. Santa Barbara County visitors also generated an estimated \$60 million in taxes to the State.

Of the total taxes, \$40.85 million were transient occupancy tax, accounting for 81.9% of all visitor generated taxes, reflecting the fiscal importance of lodging. The remaining \$9.0 million was for visitor purchases of food, beverages, retail and other items in the county.

### Employment

Tourism supported an estimated 19,872 jobs in Santa Barbara County in 2008, representing 7.5% of the countywide workforce of some 265,000.

### Santa Barbara Countywide Lodging Market

The countywide lodging market, including paid hotels, motels and inns, is discussed below and shown in Table 6.

- The Santa Barbara countywide hotel market consists of 181 properties with 10,121 daily available rooms or 3.7 million available rooms on an annual basis in 2008.
  - Comparing Santa Barbara City to the county areas shows more rooms in the county, 6,663 or 66%, versus 3,458 or 34% in Santa Barbara City.
- In 2008, guests occupied 2.74 million rooms countywide, resulting in an overall occupancy rate of 73.9%.
  - Santa Barbara City properties achieved a higher occupancy rate, 76.0% versus 71.7% for the county area.
  - Due to the greater room count, county areas had far higher demand, 1.77 million occupied rooms, compared to 961,700 rooms for the City.
- Collectively, the lodgings achieved an average daily room rate of \$148 for 2008.
  - Santa Barbara city hotels achieved a far higher average room rate, \$197 versus \$121 in the county areas.

**Table 6 - Santa Barbara Countywide Lodging Market Performance -2008**

	Countywide	City SB	County SB
Daily Available Rooms	10,121	3,458	6,663
Annual Available Rooms	3,704,286	1,265,628	2,438,658
Ratio of Available Rooms	100.0%	34.2%	65.8%
Annual Occupied Rooms	2,735,721	961,691	1,774,031
Ratio of Occupied Rooms	100.0%	35.2%	64.8%
Avg. Occupancy Rate	73.9%	76.0%	71.7%
Avg. Daily Room Rate (ADR)	\$ 148.03	\$ 197.01	\$ 121.54

Source: Santa Barbara Lodging Properties and Lauren Schlau Consulting

**Visitor Profile - Residence**

Another goal of the study was to identify visitor demographics and trip characteristics, including visitor origin, as discussed below.

- Of total visitors, 63% were Californians, 19% were residents of other states and the remainder, 18% were from international areas. Thus, 72% were U.S. residents.
  - For Santa Barbara City, 56% were Californians, 22% were residents of other states and 23% were from international areas. Thus, 78% were U.S. residents.
  - For Santa Barbara County areas, 61% were Californians, 22% were residents of other states and 17% were from international areas. Thus, 83% were U.S. residents.

**Table 7a – Visitor Residency Overall**

	<b>Total</b>	<b>SB City</b>	<b>SB County Areas</b>
<b>Base</b>	<b>1587</b>	<b>550</b>	<b>566</b>
% California Resident	63.4%	55.5%	61.1%
% U.S. Resident Visitor (excl. California)	19.0%	21.8%+	22.3%
% International Visitor	17.6%	22.7%	16.6%

- Of the U.S. origin visitors, 77% were from California, with far fewer from Arizona, Texas, New York and Washington, as shown below.

**Table 7b - Top U.S. Feeder Markets**

	<b>Total*</b>	<b>SB City</b>	<b>SB County Areas</b>
<b>Base: U.S. residents</b>	<b>1247</b>	<b>796</b>	<b>747</b>
1. California	76.9%	73.9%	75.0%
2. Arizona	3.1%	1.6%	4.3%
3. Texas	2.5%	3.9%	4.0%
4. New York	1.6%	1.9%	1.1%
5. Washington	1.5%	1.4%	1.9%

\*Percentages based on U.S. residents, not the entire sample.

- As shown in Table 7c, 60% of the **California visitors** overall were from Southern California with 33% from Central areas and 7% from Northern California.
- However, in looking at origin by SB City versus County areas, far more Southern Californians visited in county areas while more from Central California visited Santa Barbara city.

**Table 7c- California Regions**

	Total	SB City	SB County Areas
<b>Base: CA resident</b>	<b>837</b>	<b>550</b>	<b>556</b>
Southern California	59.9%	53.5%	70.5%+
Central California	33.4%	38.8%	21.6%-
Northern California	6.7%	7.7%	7.8%

- Among **international visitors**, as shown in Table 7d, Europe was the largest feeder market, with 61% of total international volume.
- Asia was second with 10%, followed by Scandinavia with 9%, Mexico at 6%, and Canada (eastern and western) at 5%.
- Europeans were more heavily represented in Santa Barbara City, 68%, while more Asians, 21% and Scandinavians, 15% were in the county areas.

**Table 7d - Top Overall International Feeder Markets**

Origin Country/Region	Total*	SB City	SB County
<b>Base: Non-US visitors</b>	<b>340</b>	<b>248</b>	<b>164</b>
Europe (Other than Scandinavia)	61.0%	68.1%	37.9%-
Asia	9.9%	12.0%	20.9%
Scandinavia	9.2%	6.2%	15.3%
Mexico	5.7%	3.2%	6.3%
Australia/ New Zealand	3.7%	3.6%	5.4%
Canada-Western	2.5%	1.5%	3.4%
South America	2.5%	0.5%	3.3%
Canada-Eastern	2.4%	1.7%	2.4%
Central America	1.4%	1.5%	2.7%
Middle East	1.1%	1.4%	2.0%

\*Percentages based on international resident visitors, not the entire sample.

- As shown in the next table, the **top European markets** (excluding Scandinavia) were the United Kingdom with 57.5% and Germany with 21%.

- This varied slightly between city and county areas, with more from the U.K., 57% in the City versus 48% in the county areas, but more Germans, 33% in the county versus 21% in the city.

**Table 7e - Top European Feeder Markets**

	Total	Total Visitors SB	
		City	Cnty
<b>Base: visitors from Europe</b>	<b>182</b>	<b>174</b>	<b>123</b>
United Kingdom	57.5%	57.2%	48.3%
Germany	20.9%	20.8%	33.7%
Switzerland	4.0%	4.0%	6.8%+
France	3.6%	3.7%	1.2%
Netherlands	2.8%	2.8%	4.3%
Italy	0.2%	0.3%	0.6%
Other	10.9%	11.2%	5.2%

\*Percentages based on European visitors, not the entire sample.

- Again, 10% of countywide visitors were from Asia.
- Of the Asian visitors, 5% were from Japan and 4% from Thailand, while 88% were from other areas not specified.

**Table 7f - Top Asian Feeder Markets**

	Total*	SB City*	SB County*
<b>Base: visitors from Asia</b>	<b>14</b>	<b>13</b>	<b>11</b>
Japan	4.6%	4.8%	4.0%
Thailand	4.0%	0.0%	4.1%
Philippines	2.0%	2.1%	2.1%
China	0.8%	0.8%	0.0%
South Korea	0.4%	0.4%	0.4%
Other	88.3%	92.0%	89.4%

\*Percentages based on Asian visitors, not the entire sample. Due to the small base these percentages are subject to wide variance.

Shown in the next table is international visitors' seasonality to Santa Barbara County.

- Overall, 25% of international traveled to Santa Barbara County in the Fall season, with 20% arriving in the Summer but less than 15% came in Winter or Spring.
- By region, it can be seen that more Europeans visited in the Fall.
- Asians were more likely to visit in the Summer, Scandinavians across seasons and Mexicans in the Summer.
- Canadians visited in Winter and Spring and South Americans also in the Spring.

**Table 8 - Domestic and International Visitor Seasonality**

	<b>Total</b>	<b>Win</b>	<b>Spring</b>	<b>Sum</b>	<b>Fall</b>
<b>Base: Respondents</b>	<b>1587</b>	<b>402</b>	<b>382</b>	<b>401</b>	<b>402</b>
U.S. Resident	82.4%	89.1%	87.2%	79.8%	74.9%
International Resident	17.6%	10.9%	12.8%	20.2%	25.1%
<b>Full Base: non-US visitors</b>	<b>340</b>	<b>59</b>	<b>89</b>	<b>98</b>	<b>94</b>
Europe (Other than Scandinavia)	61.0%	63.3%	44.0%	42.0%	80.0%+
Asia	9.9%	0.0%	2.9%	32.4%	1.3%
Scandinavia (Denmark, Finland, Iceland, Norway, Sweden)	9.2%	11.7%	11.6%	12.2%	5.2%
Mexico	5.7%	0.6%-	8.1%	4.2%	7.5%
Australia/ New Zealand	3.7%	9.2%	5.6%	3.4%	1.2%-
Canada-Western	2.5%	5.6%	4.3%	2.2%	0.9%
Canada-Eastern	2.4%	3.4%	2.7%	1.5%	2.7%
South America	2.5%	0.0%	12.9%	0.6%	0.2%
Central America	1.4%	2.0%	4.7%	1.1%	0.0%
Middle East	1.1%	2.8%	0.9%	0.4%	1.0%
All Other	0.6%	1.3%	2.3%	0.0%	0.0%

### **Visitor Profile –Key Factors All Visitors**

The key visitor profile factors are shown in Table 9 and discussed below. In Table 10 activities are detailed by area and by season.

In general, Santa Barbara County visitors on a countywide basis were as follows:

- By origin, visitors were mainly Californians, 63%, with 19% from other U.S. states and 18% international visitors.
- More than six of ten visitors, 62% had visited the county within the past three years and of those who did, they averaged 4.8 trips in that period or over one per year.
- To plan their trip, 39% used either past experience, while 33% relied on a family member or friend. Another 12% used the Santa Barbara visitor website.
- Visitors main purpose for visiting the area was leisure, by 30%, with 14.7% visiting relatives/ friends/ personal visit, 14.5% were passing through to another place and 13.9% were generally sightseeing or exploring the area.
- Once in the area, visitors' top activities included; dining out in a Santa Barbara restaurant, by 31%, 26% went to the beach, 25% were sightseeing/exploring the area, and 25% went browsing or shopping.
- Also popular were wine tours and wine tasting, by 16.5%, and 14% did cultural activities (museums, performances, historic/architectural sites, festivals).
- Over one-half or 62% were day visitors, and 38% stayed overnight.
- Those staying overnight averaged 4.38 days overall countywide. This was 3.0 days for Santa Barbara City and 4.4 days in the county areas, again mainly due to more private home and other paid lodging guests staying in the county areas versus the greater number of day visitors in SB city.
- Nearly one-half of countywide overnight visitors, or 49.7% stayed in hotel/motel lodging. This was 74.1% for Santa Barbara City versus 41.6% for county areas.
- Lodging guests reserved their lodging 3.8 weeks in advance of their visit.
- Of the hotel guests, 54% used the internet to make their hotel reservation.
- Just 18% overall arrived into Santa Barbara County by air.
- Overall each visitor spent an average of \$84 per-day while in the county. Spending ranged from the \$151 daily average spent by each hotel guest and \$67 by a private home visitor, to about \$31 by each day visitor.
- Each international visitor spent \$101 per-day versus \$80 for each U.S. resident.
- Visitors averaged 43 years of age.
- Visitors reported average household income of \$85,200 (for 2007).

**Table 9 - Overall Profile of Santa Barbara Countywide Visitors**

Characteristic	SB Countywide
% <b>California</b> resident	63.4%
% <b>Other U.S.</b> Resident	19.0%
% <b>International</b> Resident	17.6%
% Visiting: <b>First-time</b> in 3 Years	37.8%
% <b>Past Visitor</b> in 3 Years	62.2%
Avg. # <b>Visits to SB</b> in Past 3 Years (by those who visited)	4.82
<b>Top Trip Planning Information Sources</b>	
Own experience/been here before	38.9%
Family member/friend	32.7%
SB destination website	11.6%
<b>Main Visit Purpose</b>	
Pleasure/leisure/vacation	30.6%
To visit relatives/friends/personal visit	14.7%
Passing through to another place	14.5%
General sightseeing/ exploring the area	13.9%
<b>Top Activities</b> in SB Countywide:	
Dining out in a Santa Barbara restaurant	31.4%
Going to the beach	26.0%
Sightseeing/exploring the area	25.2%
Browsing or shopping	24.7%
Visit wineries/wine tours	16.5%
Cultural (museums, performances, historic/archit. sites, festivals)	14.4%
<b>% Day Visitors:</b> Countywide	61.7%
SB County areas	54.6%
SB City	81.9%
<b>% Overnight:</b> Countywide	38.3%
SB County areas	45.4%
SB City	18.1%
<b>Avg. Days Stay</b> ( overnights)	
Countywide	4.38
SB City	3.01
SB County areas	4.49
% of overnight staying in <b>hotel/motel:</b>	
Countywide	49.7%
SB City	74.0%
SB County	41.6%
% Used <b>Internet for SB Hotel Reservation</b>	54.0%
<b>Median Weeks</b> in advance Reserved SB Hotel	3.8
<b>% Main Destination:</b> SB City / SB County areas	31.3% / 36.2%
Arrived by <b>Air into SB Region</b>	18.1%
Average daily <b>spending/person</b> in Santa Barbara - <b>all</b>	\$ 83.98
Average daily <b>spending/person</b> in Santa Barbara – <b>hotel guests</b>	\$ 151.42
Average daily <b>spending/person</b> in Santa Barbara - <b>home visitors</b>	\$ 66.92
Average daily <b>spending/person</b> in Santa Barbara - <b>day visitors</b>	\$ 30.73
Average daily <b>spending/person</b> in Santa Barbara – <b>U.S. visitors</b>	\$ 79.55
Average daily <b>spending/person</b> in Santa Barbara – <b>international</b> visitors	\$ 101.13
Avg. Age of Respondent (years)	43.0
Median Annual Household Income (2007)	\$85,200

**Table 10 - Overall Activities of Santa Barbara Visitors – by Area and Season**

	Total	Total Visitors		Wave			
		SB City	SB County	Win	Spr	Sum	Fall
<b>Base</b>	<b>1587</b>	<b>1209</b>	<b>1120</b>	<b>402</b>	<b>382</b>	<b>401</b>	<b>402</b>
Passing through to another place	35.7%	38.0%	34.7%	21.0%-	29.3%	33.3%	55.1%+
Dining out in a Santa Barbara restaurant	31.4%	26.4%-	44.4%+	51.6%+	15.2%-	28.2%	30.8%
Going to the beach	26.0%	27.3%	36.0%+	13.9%-	18.9%-	47.1%+	24.2%
General sightseeing/ exploring the area	25.2%	24.8%	35.1%+	32.3%	22.9%	23.6%	22.7%
Browsing or shopping in general	24.7%	19.5%-	36.4%+	44.4%+	11.9%-	21.6%	21.6%
Visit wineries "Sideways" tour	16.5%	10.9%-	25.7%+	34.3%+	11.3%	7.6%-	13.6%
Other area activities	9.6%	11.1%	10.1%	3.6%	20.6%	6.9%	7.6%
Golfing	5.3%	1.8%	7.9%+	15.1%	4.6%	1.1%	1.2%
Other outdoor/ water recreation	4.3%	4.3%	5.6%+	2.4%-	3.6%	3.9%	7.0%+
Attending a family function/ event/ reunion/ wedding	4.2%	3.9%	5.6%+	1.3%-	6.1%	5.3%	4.1%
Attending the Casino	3.9%	1.9%	6.0%+	5.7%	2.2%	1.8%	5.4%
Visit historic or architectural sites	3.8%	5.1%+	5.3%+	3.4%	6.0%	3.1%	2.9%
Visit art museums/ galleries	3.7%	4.6%+	4.6%	4.5%	4.9%	2.5%	3.2%
Attending a local special event/ festival	2.8%	1.9%-	3.8%+	3.2%	5.1%+	1.7%	1.4%-
Attending a meeting/ conference/ educational seminar	2.1%	2.9%	2.9%	0.7%	1.0%	5.9%	0.9%
Conducting business	1.9%	1.5%	2.2%	3.8%	2.0%	1.0%	1.1%
Attend art shows/ festivals/ cultural events	1.7%	2.1%	2.4%+	1.6%	3.2%+	0.9%	1.4%
Attend nightclubs/ nightlife	1.5%	1.9%+	2.1%+	0.6%-	2.1%	1.7%	1.7%
Attend live arts performance	0.9%	0.9%	1.2%+	0.6%	1.3%	1.6%	0.1%-
Vandenburg or military related meeting, project or business	0.7%	0.2%	1.1%	2.8%	0.1%	0.0%	0.1%
Attending or in a sports tournament	0.4%	0.5%+	0.5%	0.1%-	0.7%	0.7%	0.0%-
Go to a spa/ health retreat	0.3%	0.4%	0.5%+	0.2%	0.3%	0.3%	0.4%
See film or TV locations	0.1%	0.1%+	0.2%+	0.0%	0.3%+	0.0%	0.1%
Other	2.6%	0.7%-	4.0%+	3.4%	0.6%-	4.9%+	1.7%
None	17.6%	23.5%+	3.5%-	20.6%	24.8%	19.8%	7.6%-