



Santa Cruz County Visitor Profile

Presented by:

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Background

- As region's official visitor marketing entity, SCCVC relies on current & comprehensive visitor behavior, attitude & demographic data.
- SCCVC commissioned a visitor profile study for calendar year 2009, first since 2000 (part of ad conversion study both times).
- Results useful to:
 - guide SCCVC communications and marketing, especially to increase paid overnight visitation to Santa Cruz County.
 - assist SCCVC to convey tourism's role in local economy.
 - help guide visitor-serving business' marketing, and help them better understand and serve visitor needs.
 - public & private sector community stakeholders interested and invested in the tourism industry.

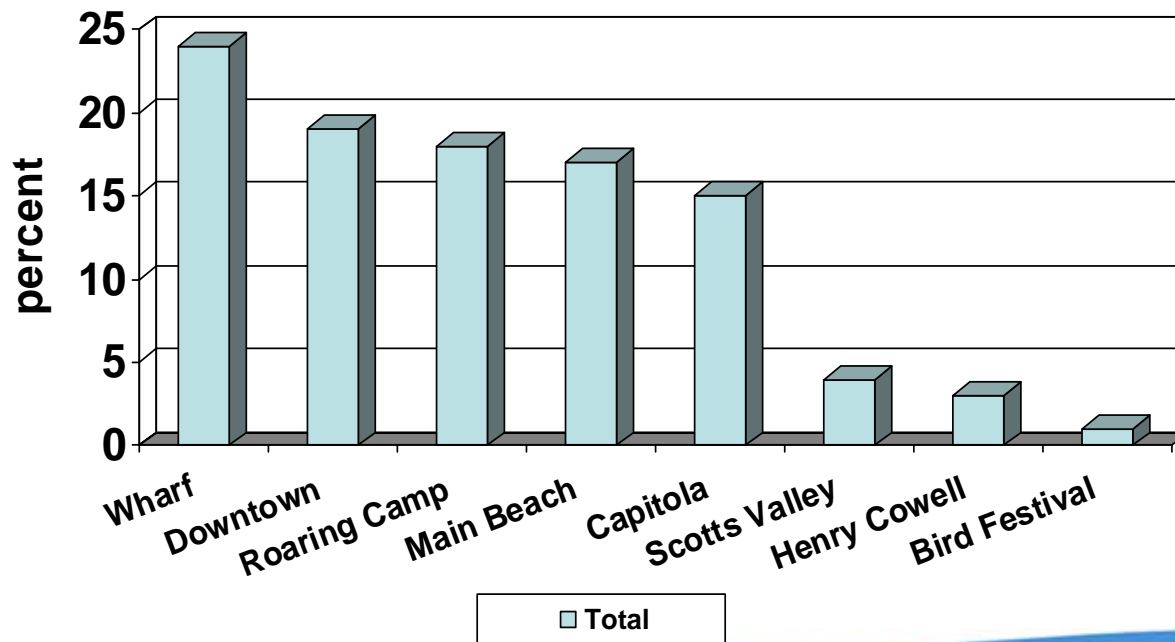


Methodology & Definition

- Total of 706 visitor groups interviewed on-site at specified locations around Santa Cruz County during three visitor “seasons” Spring, Summer, Fall, 2009.
- Definition of a “visitor:” anyone residing outside Santa Cruz County, and there for any temporary purpose (excl. regular work or school.)

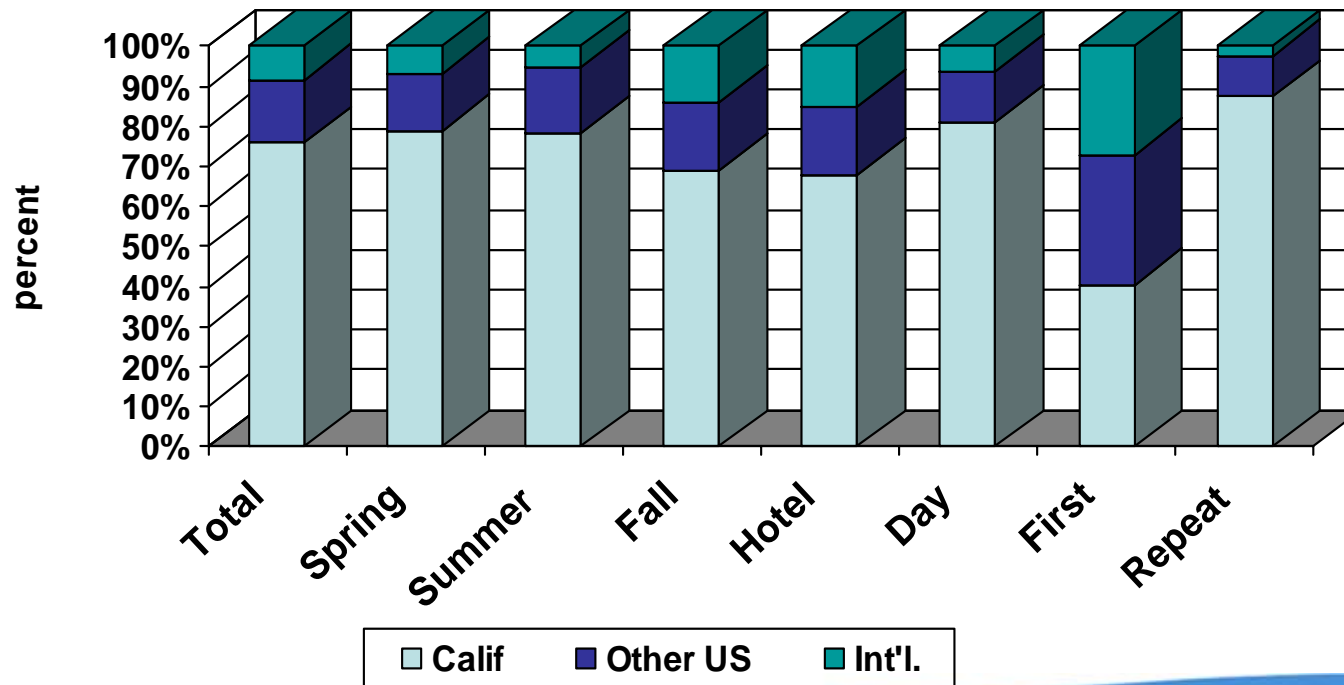
Interviewing Locations (total)

- The Wharf + Beach accounted for 41% of total interviews, with 19% in Downtown Santa Cruz.
- About 41% were conducted in areas outside of Santa Cruz city.



Visitor Residence Summary

- 76% of Total Santa Cruz County visitors were Californians, 16% from other U.S. states, and 8% from foreign countries.
- In Fall 14% were international, as were 15% of hotel guests.
- 98% of past visitors were from the U.S.; 27% of first-timers were foreign.



Top Visitor Feeder States

- Of all U.S. states, California was by far the top with 83%.
- The top 10 states accounted for 92% of all Santa Cruz visitation.

	Total	Season			SC Lodging-		
		Spring	Summer	Fall	Hotel/ motel	Priv. Home	Day Visitor
California	82.8%	84.8%	82.7%	80.2%	80.2%	62.6%	86.2%
Florida	1.7%	0.5%	2.1%	2.8%	0.0%	0.0%	2.6%
Oregon	1.3%	1.3%	1.1%	1.5%	0.0%	5.9%	0.8%
Maryland	1.2%	0.0%	3.1%	0.3%	0.0%	0.0%	1.9%
Nevada	1.2%	1.4%	1.3%	0.7%	5.2%	1.2%	0.4%
Arizona	0.9%	0.9%	1.2%	0.6%	0.3%	0.8%	0.8%
North Carolina	0.9%	0.2%	1.9%	0.5%	0.0%	6.3%	0.3%
Texas	0.8%	0.6%	0.4%	1.8%	0.0%	0.0%	1.2%
Washington	0.8%	1.0%	0.7%	0.6%	1.2%	0.0%	0.8%
Top 10 states	92.4%	90.7%	94.5%	92.0%	92.0%	77.6%	95.0%

California Visitor Feeder Areas

- 89% of Santa Cruz visitors were from Nor. Cal., 7% from So. Cal. & 4% from Central Cal.
- Summer had many more from So. Cal., 11%.
- 12% of hotel guests were from Central California.

	Total	Season			SC Lodging		
		Spring	Summer	Fall	Hotel/ motel	Priv. Home	Day Visitor
Northern Calif.	89.1%	90.0%	86.4%	91.4%	78.1%	68.1%	94.0%
Central Calif.	3.6%	6.0%	1.8%	2.5%	12.9%	8.0%	1.3%
Southern Calif.	6.9%	3.0%	11.3%	6.0%	8.2%	22.6%	4.6%

Non-U.S. Feeder Markets

- The top foreign feeders were Western & Central Europe, with 65% of all foreign markets. These were especially strong in the Fall, at 86%.
- Canada was also relatively strong at 8% overall, and 21% in the Summer.

	Total	Spring	Summer	Fall	Hotel/motel
Western Europe	50.2%	35.6%	42.2%	62.6%+	56.0%
Central Europe	14.5%	0.0%	14.2%	23.5%	10.8%
Austral/New Zealand	10.2%	19.5%	6.8%	5.9%	12.0%
Scandinavia	5.1%	14.0%	0.0%	2.0%	3.4%
Canada - Eastern	4.0%	3.2%	14.2%	0.0%	10.8%
Canada - Western	3.9%	4.9%	6.8%	2.0%	3.4%
Mexico	2.4%	6.5%	0.0%	1.0%	0.0%
Middle East	1.9%	6.5%	0.0%	0.0%	0.0%
Southeast Asia	1.5%	4.9%	0.0%	0.0%	0.0%
Japan/Korea	1.5%	0.0%	6.8%	0.0%	0.0%
South America	1.0%	3.2%	0.0%	0.0%	0.0%
All Other	3.9%	1.6%	9.0%	3.0%	3.4%

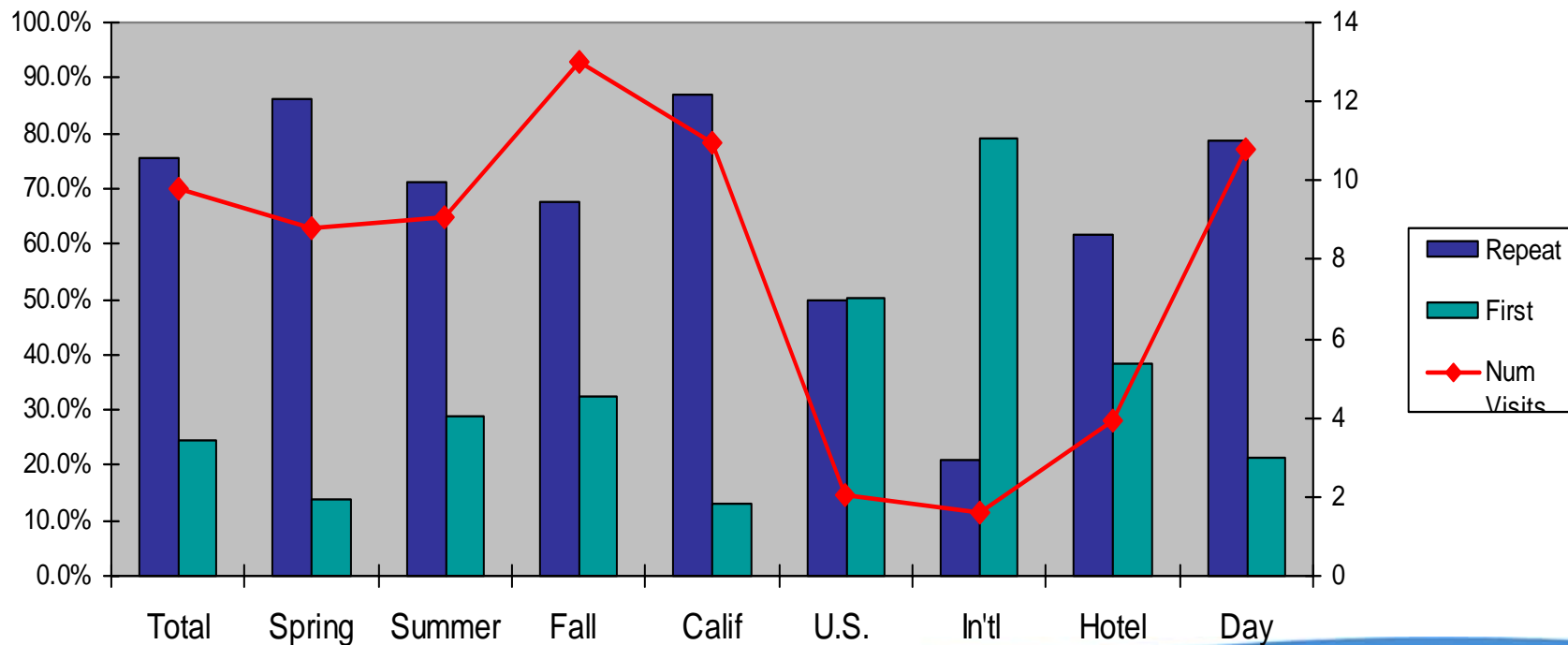
Likelihood to Visit in Another Season (asked of Summer visitors)

- Two-thirds, or 68% of Summer visitors would be likely to visit the Santa Cruz area in another season other than Summer.
- Of those likely, 65% would prefer to visit in the Spring instead.

Likely to Change Seasons	Total- Summer
Very likely (4)	34.8%
Somewhat likely (3)	33.3%
Net "likely"	68.1%
Somewhat unlikely (2)	10.3%
Not at all likely (1)	21.6%
Mean rating	2.81
Season Most Likely to Visit in:	139
Spring	64.7%
Fall	26.6%
Winter	8.6%

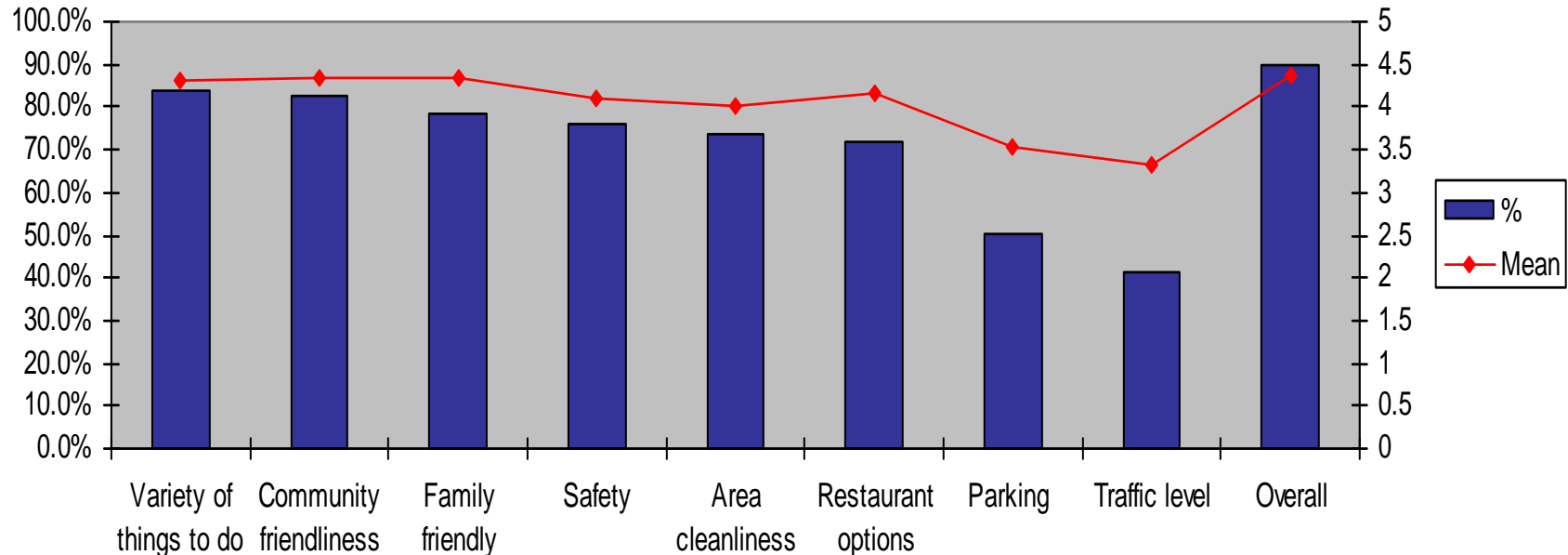
First-Time vs. Repeat Visitation

- Most visitors 76% have been to Santa Cruz County before.
- Residence area and season impacted visitation.
- Repeat visitors took nearly 10 visits in the past two years.



Satisfaction Ratings

- Nearly 90% were extremely or very satisfied with Santa Cruz as a destination.
- The overall mean rating was 4.36 out of 5.
- Only parking and traffic were rated lower than 4.0.



Sources of Area Visitor Information

- Most visitors used own/past experience for information both to plan their trip and once in the area.
- Many also relied on their friends and family.

Source	Planning	In Area
Own experience/been here before	44.3%	62.6%
Family member/friend	20.2%	11.4%
NET: Internet	12.2%	3.4%
Travel website like travelocity.com	7.9%	2.2%
Santa Cruz Internet/web site	3.6%	1.0%
SC Visitor Guide, books/Auto Club	3.4%	2.4%
Tour Operator	1.5%	1.5%
Calif. state Internet/web site	1.2%	n/a
Other	24.3%	15.5%
None	3.0%	6.7%

Main Trip Destination

- The main destination for 80% of visitors was somewhere in Santa Cruz County.

City of Santa Cruz	52.8%
San Lorenzo Valley	13.7%
Capitola	8.9%
Other SC County	4.5%
Tot. Santa Cruz County	79.9%
San Francisco/Bay area	11.3%
Southern Calif.	2.5%
Other U.S. areas /all of U.S.	2.0%
Monterey/San Jose-Silicon Valley areas	3.3%
Western states	0.3%
Other Calif. areas	0.3%

Transportation into the Region and to Get Around Santa Cruz

- 59% arrived into the Northern California region by driving and 27% flew in.
- Once in the area, most, 69% drove a personal car, and 12% drove a rental car.

	Arrival into Nor. Cal. (non-Nor. Cal. resident)	Around SC (all)
Personal/borrowed vehicle	59.4%	69.4%
Commercial air	26.6%	n/a
Tour or other bus	7.2%	5.9%
Rental vehicle	2.7%	11.7%
RV/trailer	2.3%	1.5%
Walking	n/a	37.0%

Main Purpose of Visit to Santa Cruz County

- Most visitors, 84% came to Santa Cruz County for vacation/leisure as their main purpose.
- For 83%, their main purpose was their only purpose.

	Main Purpose	Other Purpose
Vacation/pleasure/to visit	84.2%	13.8%
Visit relatives/friends/personal visit/ occasion	5.9%	3.0%
Combining business or meeting and pleasure	2.9%	0.7%
Other	2.8%	0.0%
Business or meeting	2.1%	0.6%
Passing through to another place	2.2%	0.7%
No Other purpose	n/a	82.8%

Top Activities in Santa Cruz County

- 73% went to the Beach, 70% visited attractions and 70% ate in area restaurants, the top three activities in Santa Cruz County overall.
- Activities varied by season as expected, especially beach going in the Summer.

	Total	Season		
		Spring	Summer	Fall
Go to the Beach	73.0%	69.4%	82.8%	65.8%
Visit attractions, Boardwalk, Wharf, Roaring Camp, etc.	70.2%	70.1%	74.5%	65.3%
Eat in area restaurants	70.1%	62.6%	75.7%	72.7%
Sightsee/explore the area	54.1%	50.4%	48.2%	65.5%
Go shopping	39.9%	33.5%	38.3%	49.8%
Visit the State Parks/ Redwoods	18.6%	21.0%	13.7%	21.4%
Outdoor recreation (hiking, biking, etc.)	12.9%	10.5%	14.6%	14.0%

Top Santa Cruz County Venues Visited

- Overall, 95% of visitors went to at least one attraction/venue.
- 64% went to the Santa Cruz Boardwalk, 53% visited the Wharf & 40% went to Downtown Santa Cruz, the top three venues.
- As expected, venue visitation varied by season.

	Total	Spring	Summer	Fall
Santa Cruz Boardwalk	64.0%	58.5%	77.4%	55.1%
Santa Cruz Wharf	53.1%	43.2%	53.1%	65.5%
Downtown Santa Cruz	40.4%	38.8%	33.8%	50.2%
Capitola Village	20.2%	16.3%	25.7%	18.8%
Roaring Camp	19.7%	22.2%	13.7%	23.5%
Redwoods/State Parks	15.9%	16.3%	11.1%	21.1%
Capitola Mall	5.3%	3.2%	7.6%	5.3%

Overnight vs. Day Visitation in Santa Cruz County

- 63% visited Santa Cruz County for the day only & 37% stayed overnight.
- Of overnight visitors, 42% stayed in a hotel/motel.
- Lodging varied less by season but more by visitor residence.

	Total	Season			Residence		
		Spring	Summer	Fall	Calif.	Other US	Int'l.
Santa Cruz Co Day visit only	63.1%	64.4%	62.8%	61.8%	67.2%	51.7%	47.5%
Overnight in Santa Cruz County	36.9%	35.6%	37.2%	38.2%	32.8%	48.3%	52.5%
Lodging Type (overnight in SC):							
Hotel or motel	42.1%	37.6%	44.4%	44.6%	42.4%	34.3%	53.7%
Private home of friends/family	29.9%	38.0%	26.3%	24.8%	25.6%	50.1%	19.3%
RV/tent campground/park	17.4%	19.9%	13.1%	19.5%	21.1%	6.5%	15.3%
Vacation home/condo/other rental	8.8%	3.3%-	15.3%	7.8%	9.4%	7.4%	7.7%

Nights Away in Santa Cruz County

- Overnight visitors in Santa Cruz County spent an average of 3.3 nights there. Visitors averaged 10.4 nights in other areas.
- Little variance by season, but more by residence and lodging type.

	Total	Season			Vis. Residence Origin			SC Lodging	
		Spring	Summer	Fall	Calif.	Other US	Int'l.	Hotel/motel	Priv. Home
1 night	26.3%	19.5%	33.4%	26.1%	27.5%	11.9%	44.4%	38.0%	22.2%
2-3 nights	40.9%	48.1%	29.4%	45.7%	41.8%	45.3%	28.3%	47.1%	35.2%
4-7 nights	26.2%	28.9%	31.6%	16.8%	24.7%	35.9%	17.8%	13.8%	37.8%
7+ nights	6.6%	3.4%	5.7%	11.5%	6.1%	6.9%	9.5%	1.1%	4.8%
Mean nts SCC	3.32	3.27	3.32	3.38	3.00	4.86	3.62	2.02	4.02
Mean nts. other	10.36	9.33-	10.92	11.51	2.81	9.57	20.96	11.50	12.81

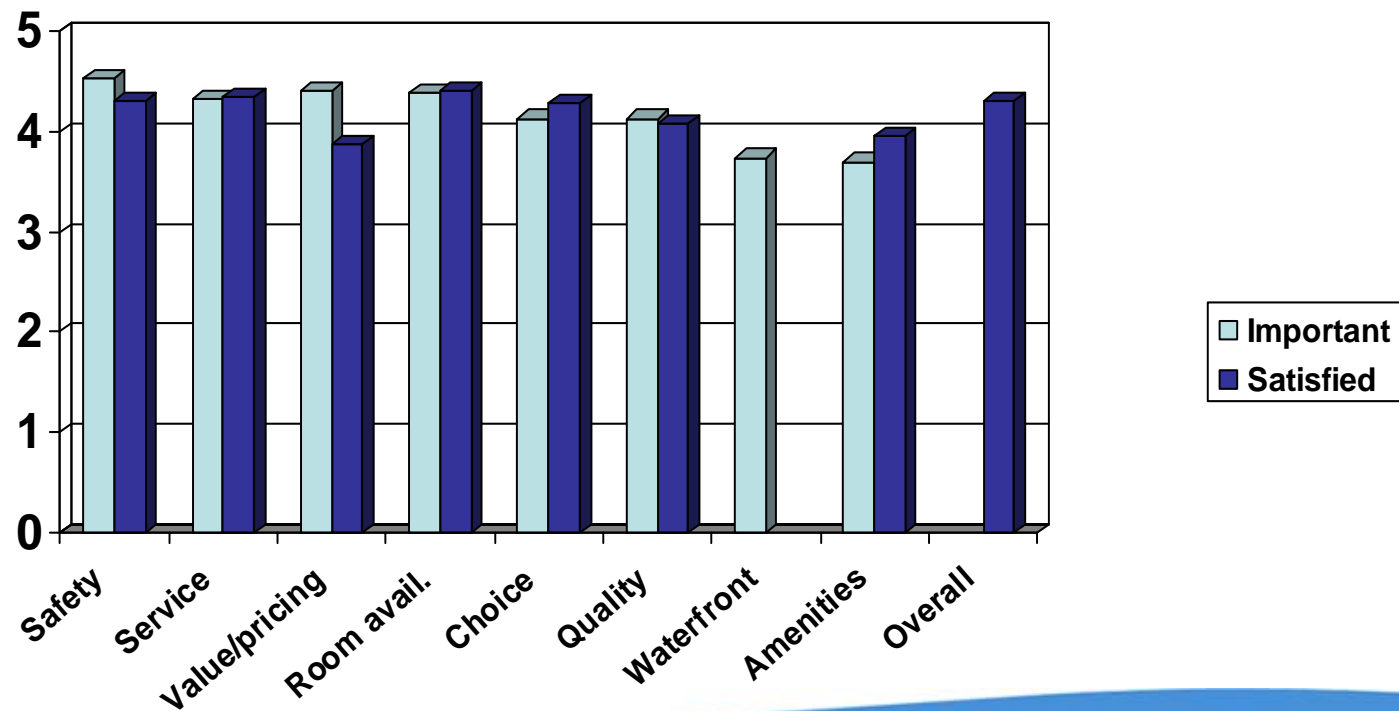
Paid Lodging Reservation

- 28% of Santa Cruz County hotel guests reserved on the hotel's internet site; 26% called the hotel (or its "800" number).
- 7% did not make an advance reservation.
- Those who reserved did so about 2 weeks in advance of the trip.

	Total
Base: SC hotel/motel guest	120
On the hotel's Internet site	28.2%
By call to the hotel or hotel's "800" reservation #	25.9%
Other Internet site	8.1%
Through a travel agent	0.5%
Did not make an advance reservation	7.0%
Advance reservation period (weeks – if reserved)	1.96

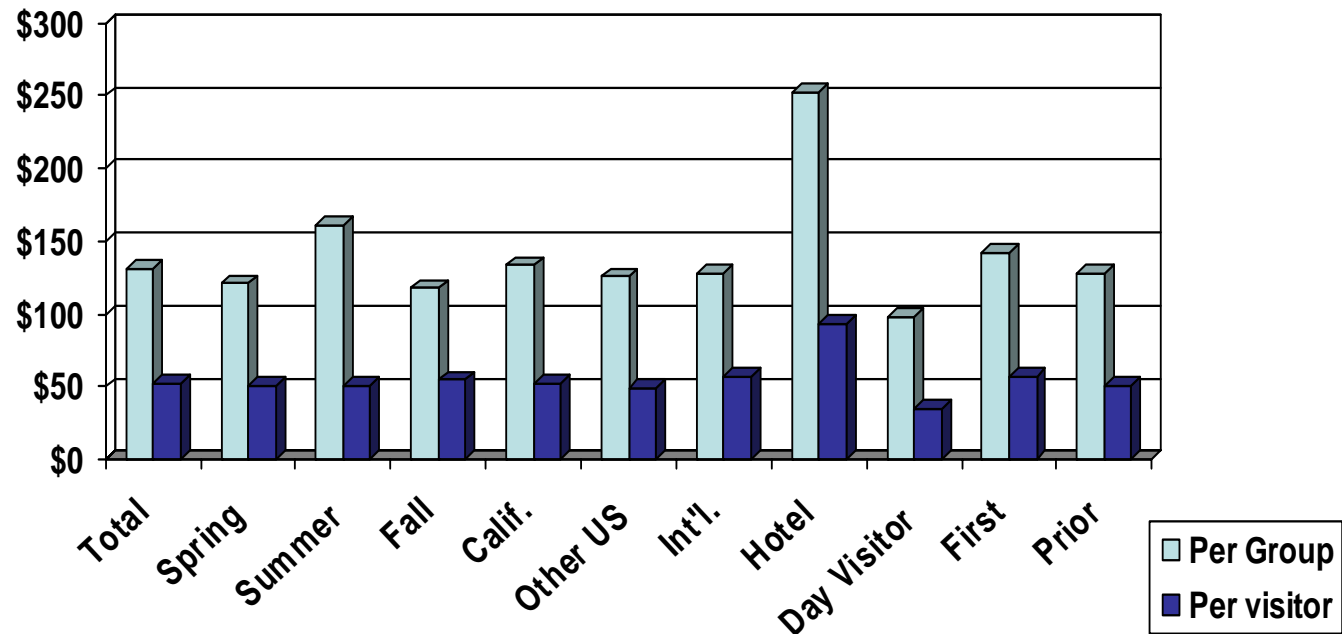
Hotel Attribute Ratings

- Santa Cruz hotel guests rated **safety** as the most important, followed by **service/treatment** and **value/pricing**.
- Least important were **beachfront** location or **on-site amenities**.



Overall Daily Visitor Spending

- Each visitor group averaged **\$131** per day in Santa Cruz County.
- Each visitor averaged **\$52** per day in Santa Cruz County.
- There are notable differences in spending by season, lodging type and first/past visitation, but less by visitor origin.



Spending by Category

(allocated to ALL visitors whether or not they spent)

- Per-group per-day, visitors spent most, **\$44 on meals/snacks out**, **\$27 on hotels** and **\$25 for shopping/gifts**.
- Per-person, visitors spent most, \$15 for lodging, \$12 for shopping/gifts and \$11 on meals/snacks out.

Average daily spending	% of groups spending	Per group	Hotel Guests	Day Visitor
Overall	97.8%	\$131.13	\$252.36	\$97.43
Meals out/snacks	89.0%	43.98	64.50	40.95
Hotel/lodging (/night in S.C.)	23.2%	27.38	106.45	5.47
Shopping/Gifts/Souvenirs	41.5%	25.38	33.85	20.84
Admissions:	23.8%	12.93	19.72	12.69
Drinks/beverages	63.5%	10.5	15.47	9.74
Local transportation	55.5%	6.01	7.01	5.81
Groceries/personal items	11.3%	4.43	4.31	1.80
Activity/equipment rental	3.7%	1.52	2.96	1.37

Travel Group Composition & Size

- Overall 36% of visitor groups were families, and 29% were couples.
- Families made up 52% in Summer while couples were 37% in Fall.
- Mean group size was 3.13 overall, close to 4 in the Summer.
- 22% traveled with children; it was 30% in Summer, but 16% in Fall.

	Total	Season		
		Spring	Summer	Fall
Family group	35.8%	32.0%	51.5%+	27.0%-
A couple	28.6%	28.4%	18.6%-	36.9%+
Group of friends/co-workers	15.3%	18.4%	12.3%	14.7%
Alone	12.0%	10.4%	10.8%	14.7%
Mix of family/friends	5.9%	6.0%	5.9%	6.0%
Other	2.3%	4.8%+	1.0%-	0.8%-
Mean: persons/ group	3.13	3.08-	3.86	2.63
% Traveling with children	22.4%	24.5%	29.2%	15.8%

Key Visitor Demographics

- Santa Cruz County visitor survey respondents averaged **41.2** years of age.
- Overall **35%** of Santa Cruz County visitors have **children under age 18** at home.
- Santa Cruz County visitors reported median household income of **\$77,900**.
- The respondent base was **52% male** and **48% female**.

 Santa Cruz County



**Questions/
Discussion**



Thank You !

 Santa Cruz County

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