



Inquirer & Conversion Survey

2009 edition

Prepared by

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Marketing Research for the Nonprofit World



Santa Cruz County

Introduction & Methodology



Intro & Methodology

- Santa Cruz County Conference and Visitors Council commissioned Campbell Rinker to conduct a survey to help guide the CVC's marketing efforts and support its mission to promote Santa Cruz County as a tourism destination.
- This survey is a follow-up to a survey conducted in December 2000.



Intro & Methodology

- In September 2009, 297 people completed the survey over the phone. On average, the survey took phone participants nine minutes to complete.
- In September and October 2009, 9,353 people were invited by email to take the online version of the survey. A total of 1,190 people logged in and qualified to take the survey, a 13% response rate. This provides a ± 2.8 percent margin of error at the 95 percent confidence level.

Intro & Methodology

- Fifty-seven percent of those surveyed have visited the area within the past two years. The table below shows how long it has been since they visited, among only those that have visited.

Time Since Last Visited Santa Cruz (n=660)	
Average Number of Months	9.2
2 or less	30%
3 to 6	19%
7 to 12	10%
12 or more	41%

Intro & Methodology

- This survey focuses specifically on those that contact the CVC for information, while the intercept survey focuses on visitors randomly approached while they are still in the area. Results from this survey include both those that have visited the Santa Cruz area, and those that have not visited. The intercept survey only included visitors.
- For the sake of comparison, many questions are the same between the two studies. But since the studies are looking at different groups, the results for many questions will naturally be different. On the next slide we've presented several key differences – differences that significantly impact portions of the results such as spending data.

Intro & Methodology

	Inquirer Survey	Intercept Survey
% that have visited SC Co. in past 2 years	57%	100%
% that were day visitors on last trip to SC Co.	16%	63%
% overnight visitors using hotel lodging	70%	42%
Avg. visitor group size	4.8	3.1
% of U.S. visitors coming from California	42%	83%



Santa Cruz County

Spending

Spending

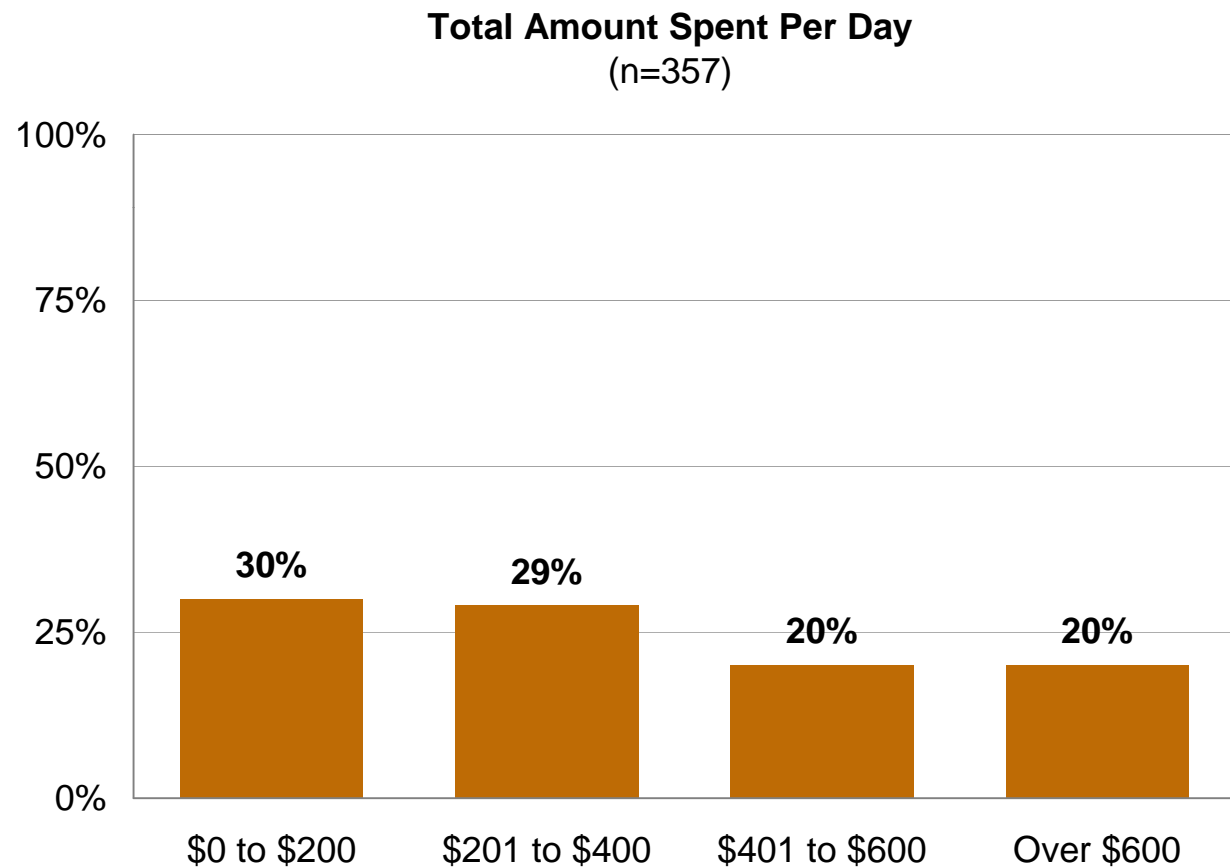
- Based on this study and other supporting data provided by the CVC, we estimate that those requesting information from the CVC spend between \$91.6 million and \$98.3 million in Santa Cruz County annually.
- For every dollar spent on the CVC budget, at least \$10 is collected in sales and hotel occupancy taxes. This multiple excludes admission taxes, parking fees, and other misc. local fees and taxes that the County may collect from visitors.

Spending

- The average spent per visitor during their entire time in Santa Cruz is \$775 for those that pay for lodging, and \$63 for day visitors.
- Groups spend an average of \$1,772 when visiting the Santa Cruz area. Forty-seven percent spend less than \$1,000, 16% spend between \$1,000 and \$1,500, and 37% spend more than \$1,500.
- The average spent for first-time visitors is \$1,652 (*this figure is less accurate than the others because it is based on only 77 responses*).
- The total spent per trip jumps to \$1,831 when we look specifically at overnight visitors, which is \$523 a day per group. The total spent by a day-trip group averages \$200.

Spending

- This chart shows what percentage of groups fall within each overall spending category.

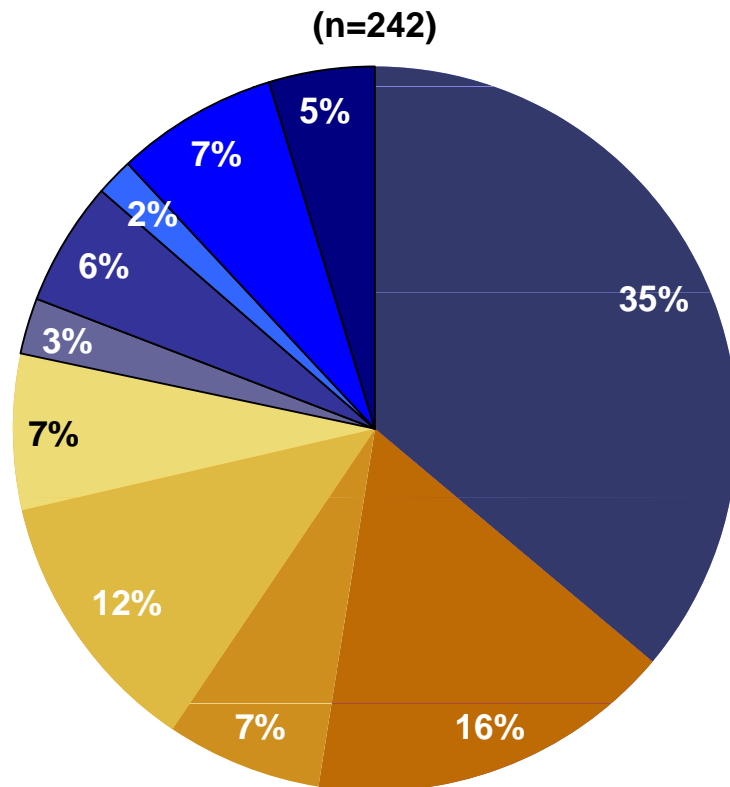


Spending

- The data in this table shows average amounts spent. Several key groups are reported on...

Spending Category	<u>Average Spending Per Day, Per Group</u>			
	Overall	1st Time Visitors	Paid Lodging Visitors	Summer Visitors
<i>N</i>	535	134	242	280
Total	\$470	\$437	\$520	\$440
Hotel/lodging	\$139	\$140	\$188	\$144
Meals/snacks	\$89	\$85	\$85	\$81
Drinks/beverages	\$31	\$29	\$36	\$33
Shopping/gifts/souvenirs	\$59	\$57	\$61	\$52
Attraction admission, museums, nightclubs	\$34	\$36	\$36	\$40
Activity or equipment rentals	\$14	\$15	\$14	\$10
Local transportation	\$29	\$28	\$29	\$24
Spa/health club amenities	\$6	\$3	\$9	\$7
Groceries/personal items	\$35	\$31	\$38	\$36
Anything else not listed above	\$34	\$13	\$24	\$14

Spending



- This chart shows the proportion of spending used on each category. The chart focuses on one key group: overnight visitors that use paid lodging.

- Hotel/lodging
- Meals/snacks
- Drinks/beverages
- Shopping/gifts/souvenirs
- Attraction admission, museums, nightclubs
- Activity or equipment rentals
- Local transportation
- Spa/health club amenities
- Groceries/personal items
- Anything else not listed above



Santa Cruz County

Trip Planning

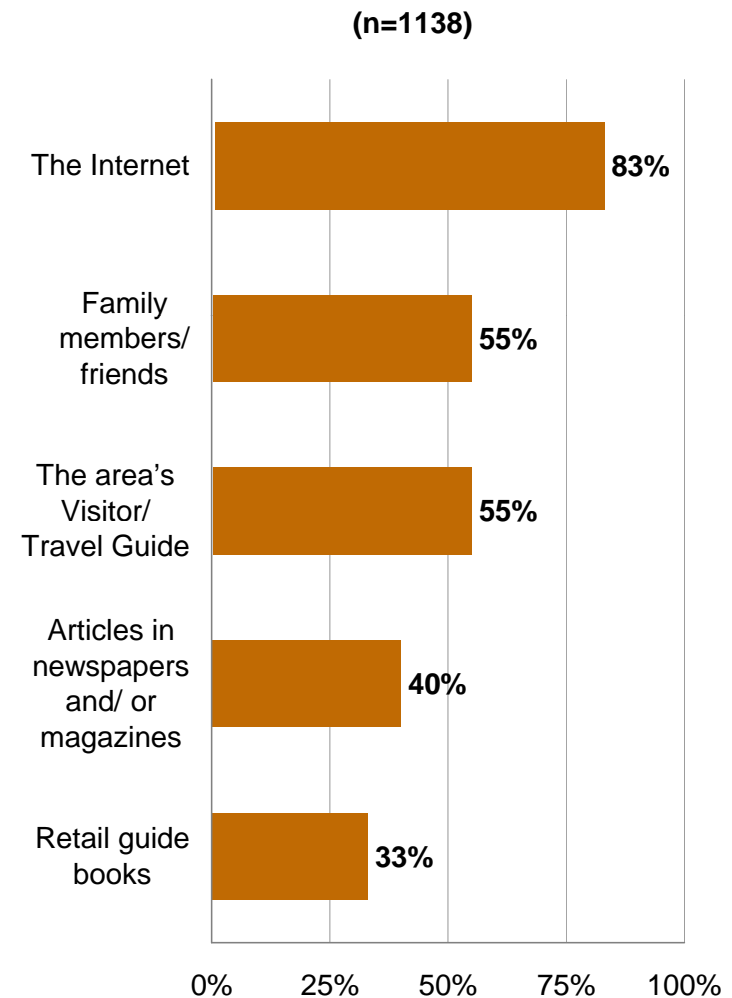
Other Destinations Considered

- Forty-four percent of those that request information from the CVC are considering alternative destinations. Below we see visitor-specific data showing that Santa Cruz has the most competition when looking at overnight visitors that use paid lodging...

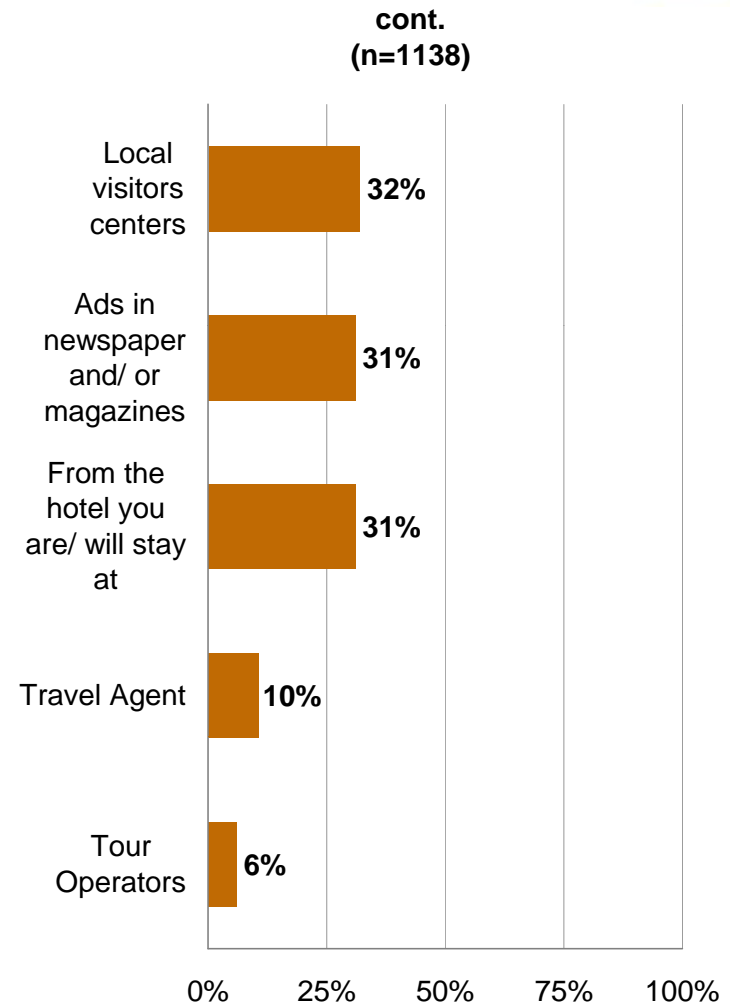
Other destinations being considered?	Overnight Visitors, Paid Lodging	Overnight Visitors, Unpaid Lodging	Day Visitors
Yes	45%	25%	36%
No	55%	75%	64%

Sources for Overnight Leisure Travel Information

- 83% of respondents who request information from the CVC use the Internet to plan overnight leisure travel.

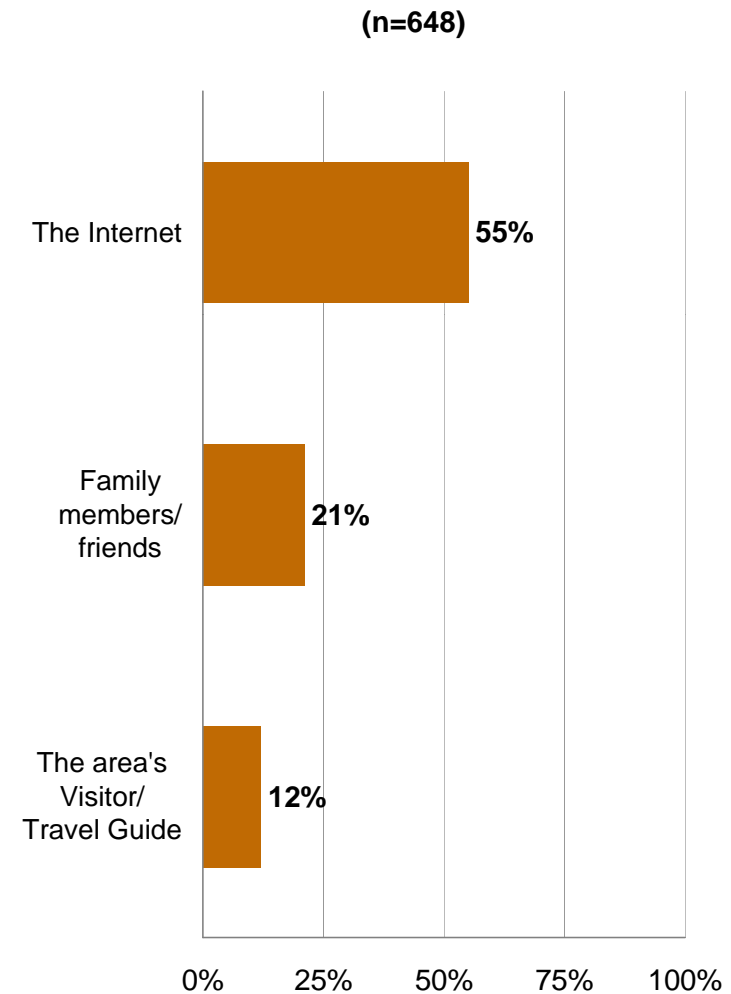


Sources for Overnight Leisure Travel Information



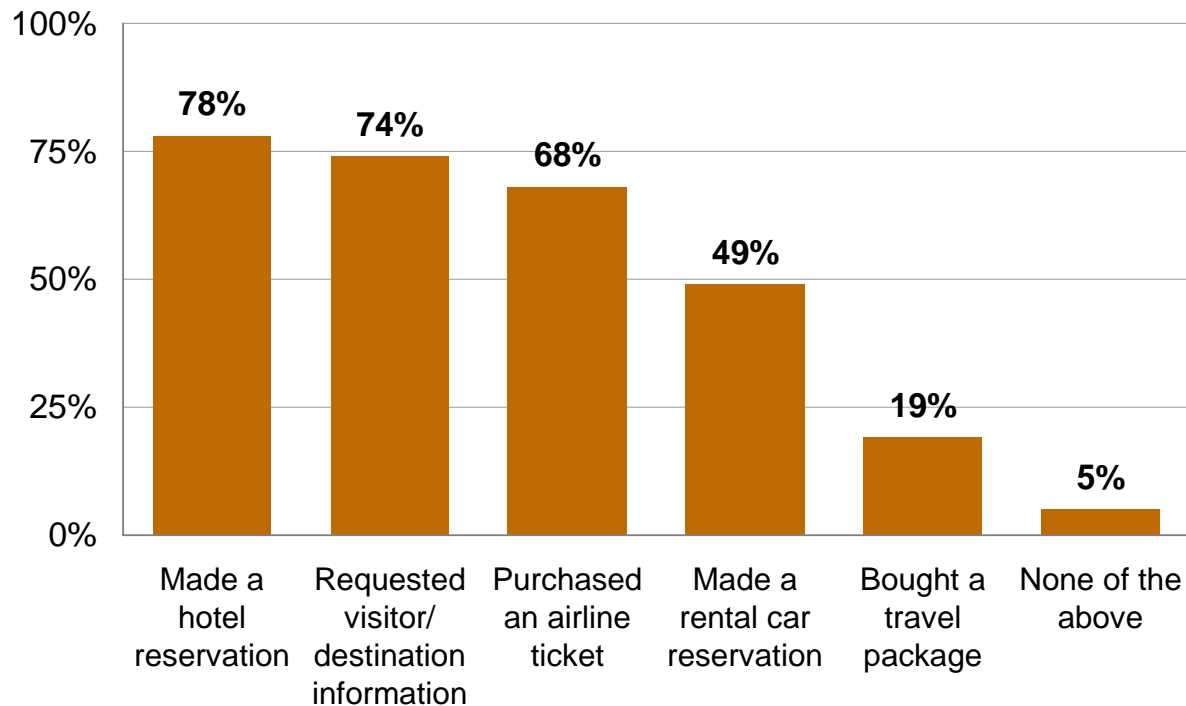
Primary Source for Travel Information

- More than half, 55%, said the Internet was their primary source of travel information when planning their trip to Santa Cruz.



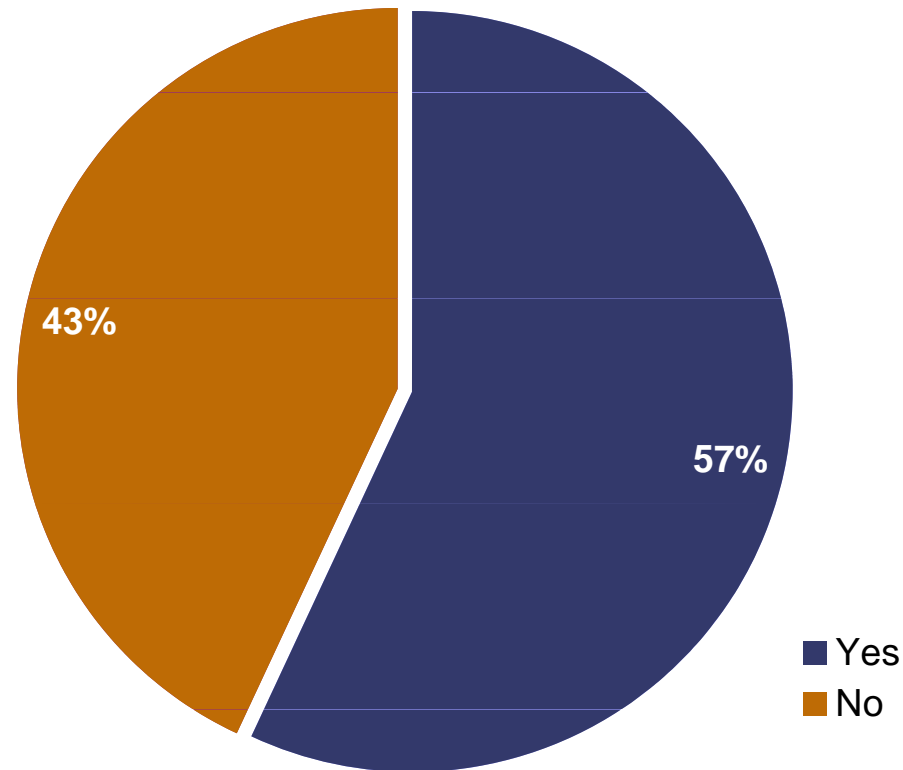
Tasks Performed Using Internet for Recent Trips

(n=941)



Advertising and Media Recall

- Nearly six in ten of those that request information from the Santa Cruz CVC recall seeing or hearing something about the Santa Cruz area in media or advertising.





Santa Cruz County

Visiting Santa Cruz

Profile of a Visitor to Santa Cruz

- Below the most common traits are identified for both those that stay overnight in the area, and those that visit without spending the night.

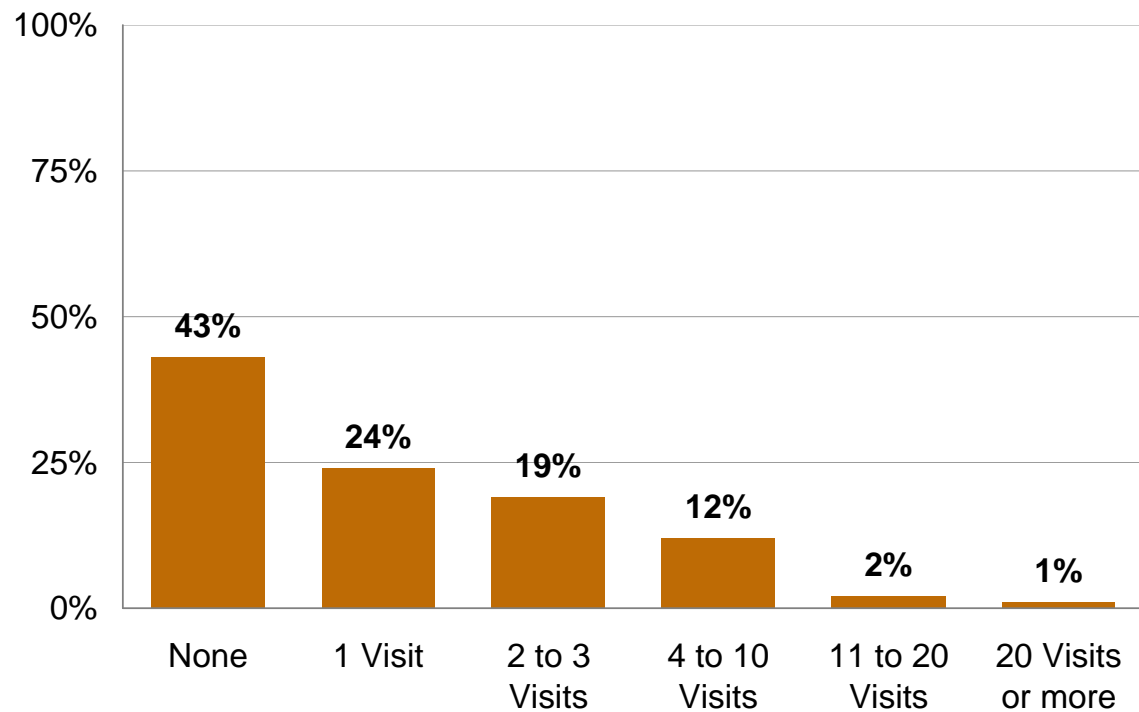
Trait <i>(individual-specific traits are for the survey respondent)</i>	Common Profile of an Overnight Visitor	Common Profile of a Day Visitor
Age	Fifties	Forties
Number of people in group (average)	Five	Four
Place of residence	California	California
Total spent by group in Santa Cruz area	\$1,831	\$200
Race/Ethnicity	Caucasian	Caucasian
Likelihood of household income being \$100k or more	38%	37%
Education	Completed College	Completed College
Marital status	Married	Married
% with children living in the home	34%	37%

Trips to Santa Cruz

- Fifty-seven percent of respondents who have requested information from Santa Cruz have visited the area within the past two years. One-third of inquirers visited the area more than once.
- The average number of visits is 2.1 for all inquirers, or 3.6 if we omit inquirers who did not visit at all. This repeat visitation rate has fallen slightly- it was measured at 3.9 in 2000. This represents between 51,703 and 55,462 visits annually from inquirers.

Number of Trips to Santa Cruz Over Past Two Years

(n=1189)



Conversion from Inquirers to Visitors

- The CVC's estimated conversion rate is 70%. The conversion rate is the percentage of people that request information from the CVC and then end up visiting, or plan to visit the area in the near future. This conversion rate takes into account the most optimistic and most conservative possible conversion measurements, seen below.

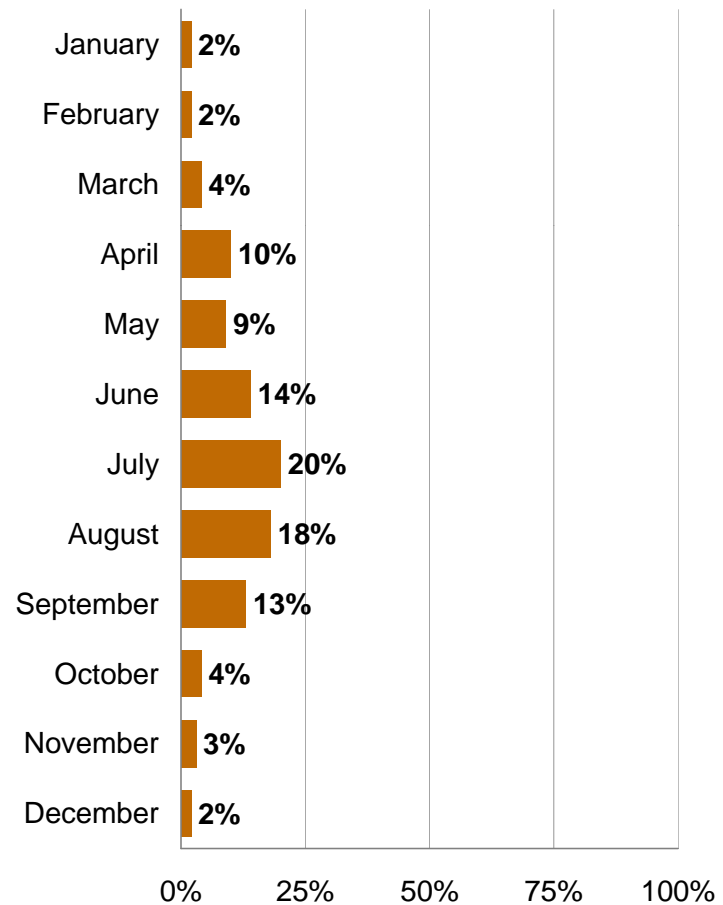
Conversion Rate (<i>n</i> =1186)	Most Optimistic Estimate	Most Conservative Estimate
Percent of Inquirers that Visit	79%	60%

- The current conversion rate is a significant increase over the 2000 conversion rate, which was estimated at 57%.

(n=671)

Month of Visit

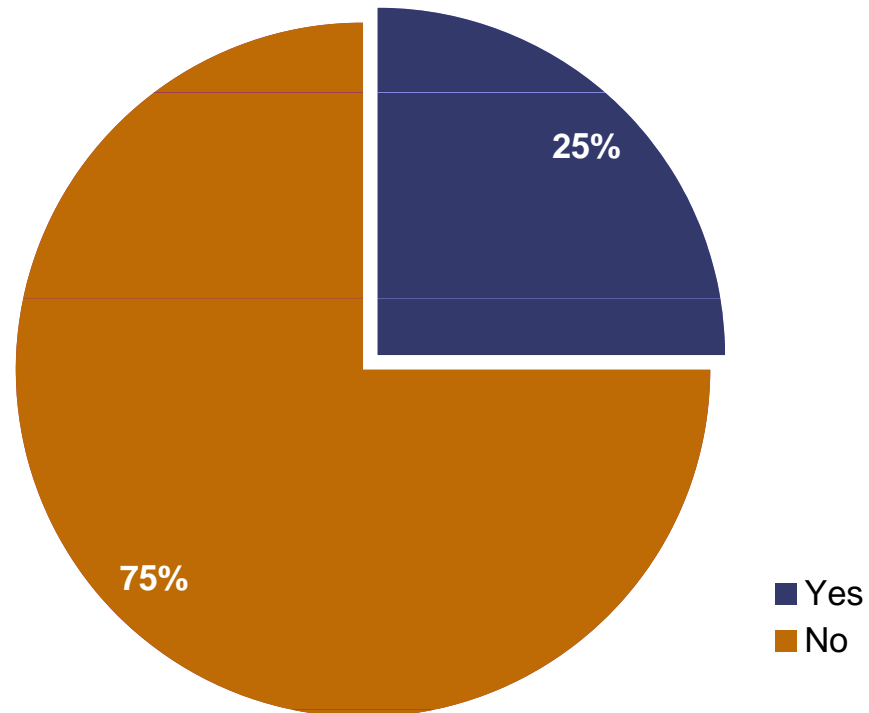
- Responding visitors came in the largest numbers in the summer months (52%, compared to 46% in 2000), and then in the spring months* (19%, compared to 12% in 2000).



**these are CVC-defined travel seasons, not seasons as they are traditionally defined*

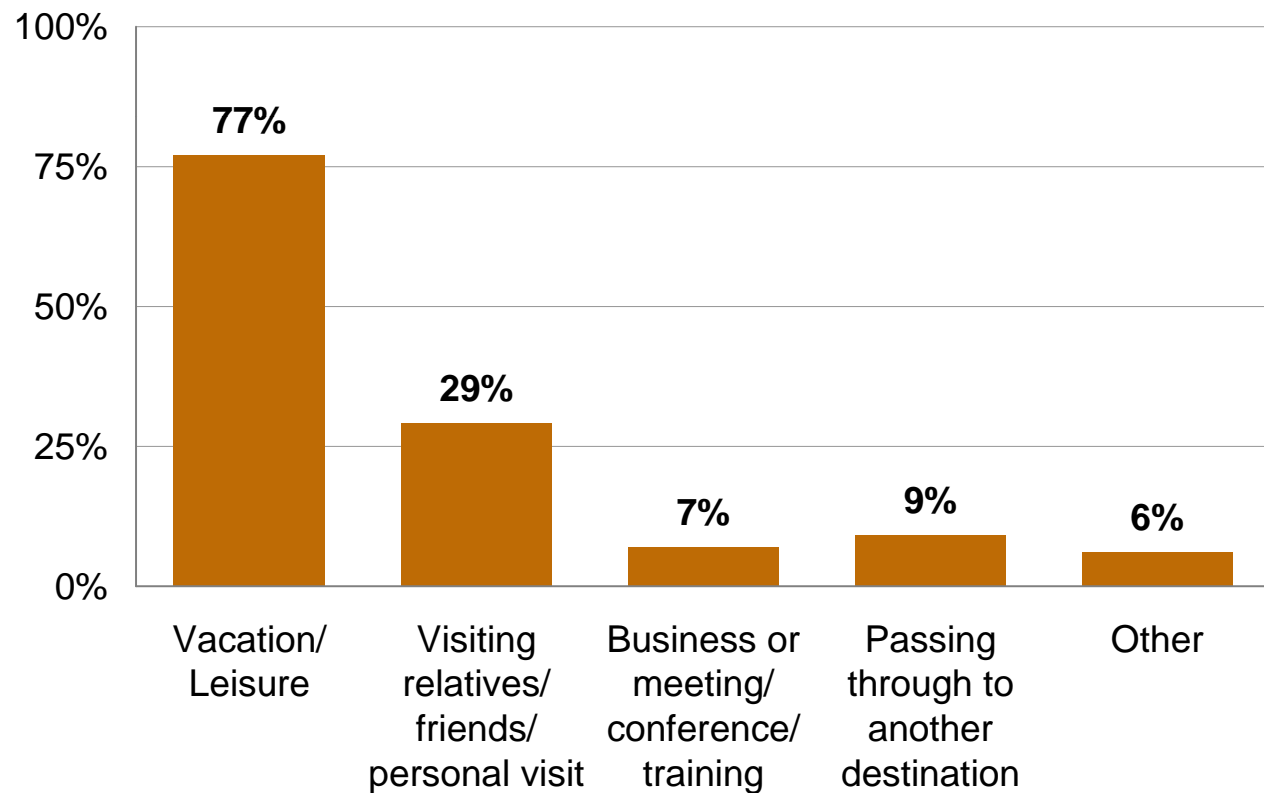
First-time Visitors

- One in four visitors are first-time visitors, compared to 32% in 2000.



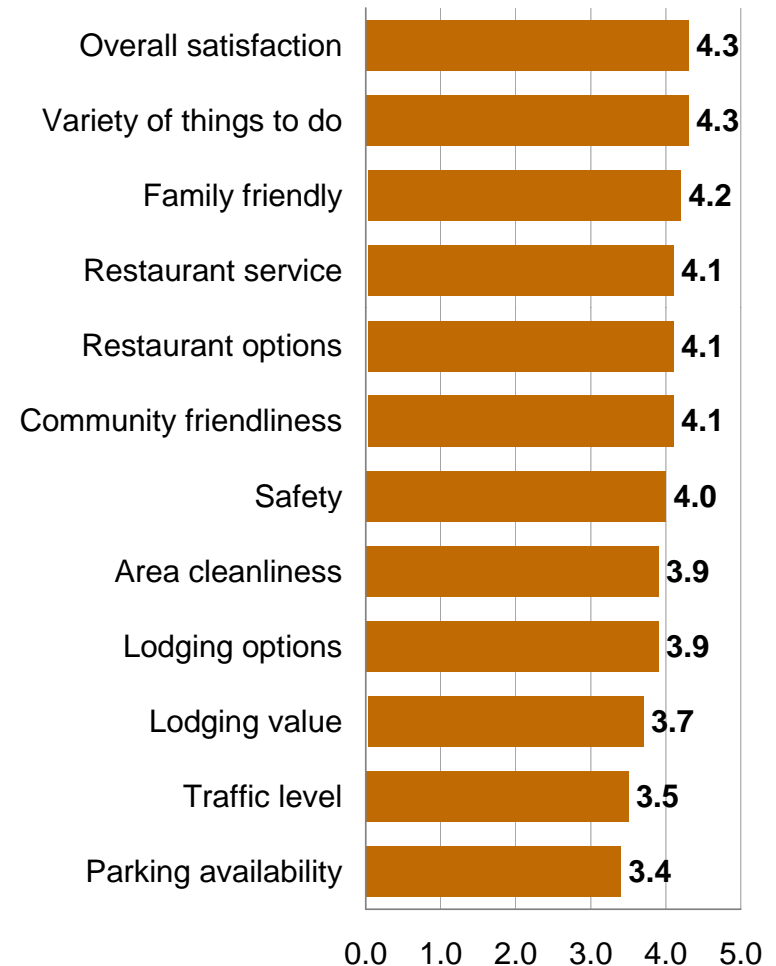
Reasons for Travel to Santa Cruz

- Respondents could select more than one response.

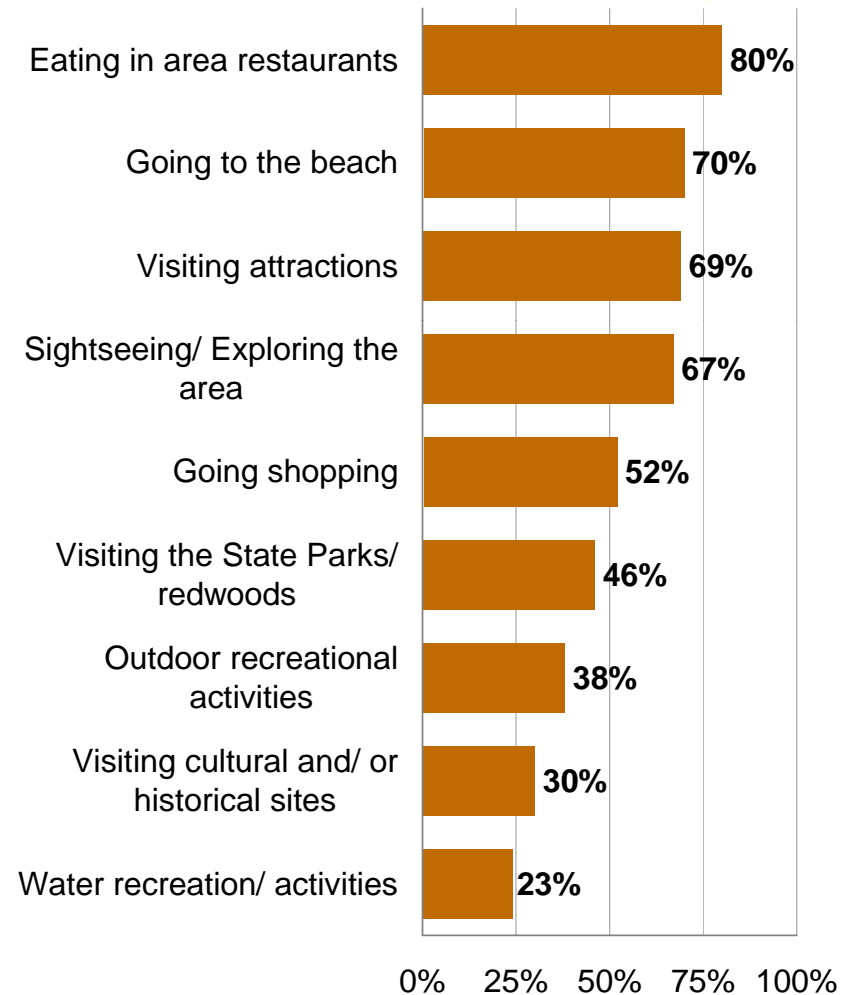


Satisfaction with Santa Cruz

- Visitors rate the Santa Cruz area a 4.3 out of a possible 5.0 as a travel destination. This is the exact same score visitors rated the area in 2000.
- They are least satisfied with the levels of traffic and available parking. These are also the same scores as in 2000.

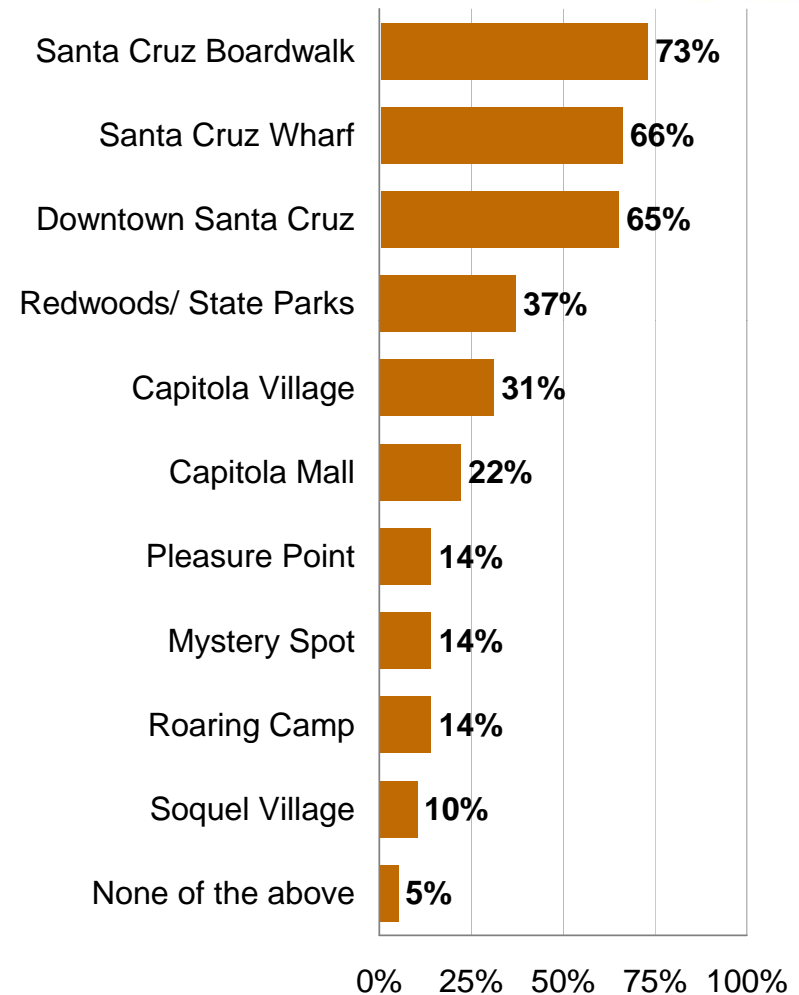


Percentage of Visitors Partaking in Specific Activities When in Santa Cruz

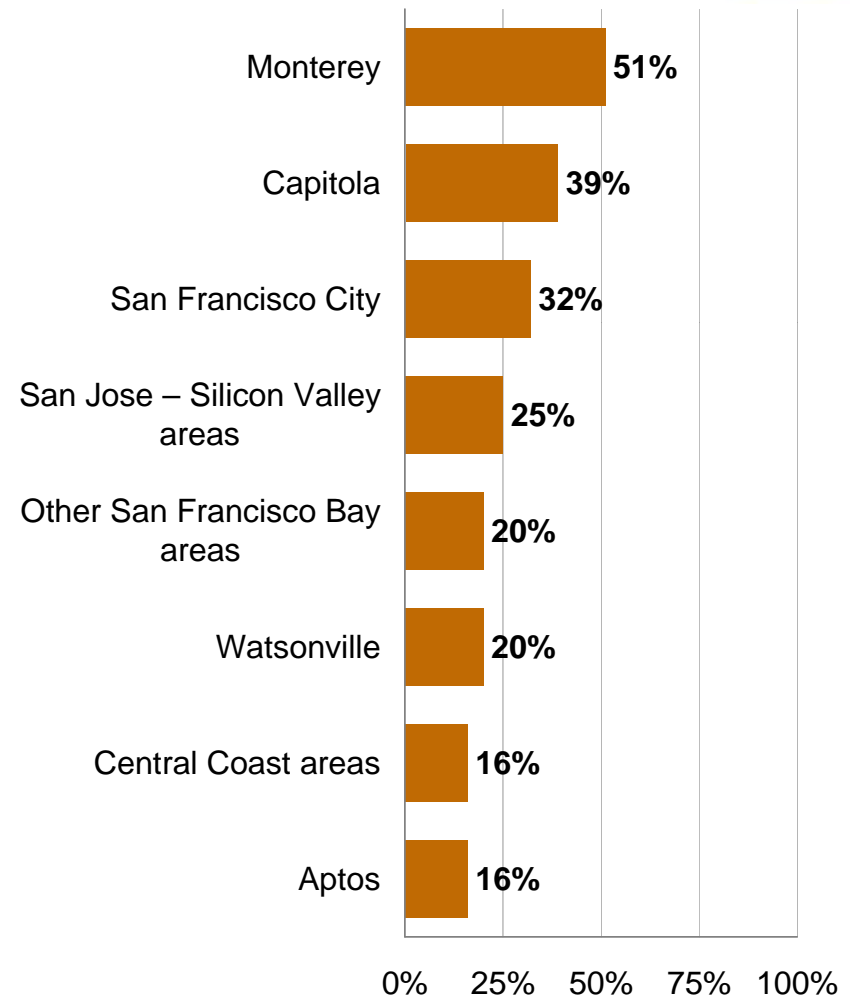


Places Visited in Santa Cruz County

- The chart shows overall figures for visitors.
- The study also found that visitors using paid lodging are significantly more likely than those that do not to visit the Santa Cruz Boardwalk, Santa Cruz Wharf, and Downtown Santa Cruz.



Other Places Visited During Trip to Santa Cruz



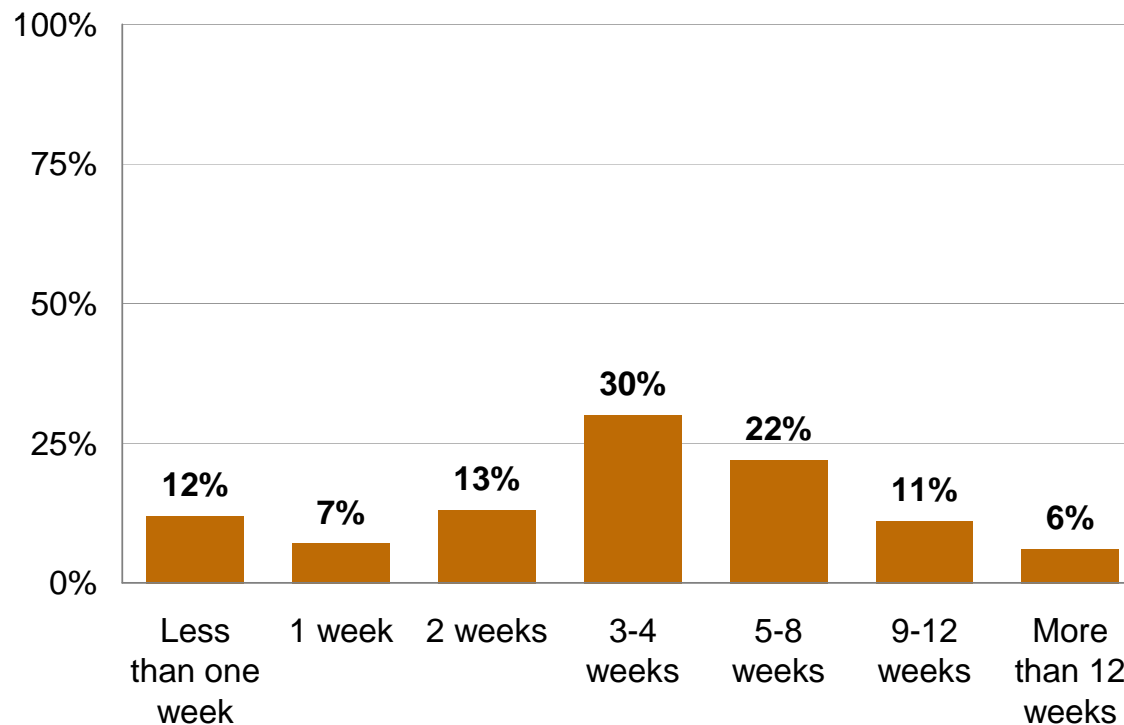
Types of Lodging Used in Santa Cruz

- Seven in ten overnight visitors who requested CVC information say they stayed in a hotel or motel during their visit, compared to six in ten in 2000. Respondents could select more than one option, so the total percentages equal more than 100%.

Lodging	Overall (n=371)	First-time Visitor (n=93)	Household Incomes Over \$100k (n=114)
Hotel or motel	70%	74%	75%
Family or friends	20%	20%	14%
Vacation rental	11%	10%	14%
Campground/RV park	8%	4%	8%
Bed and Breakfast	3%	2%	4%
Other	4%	2%	2%

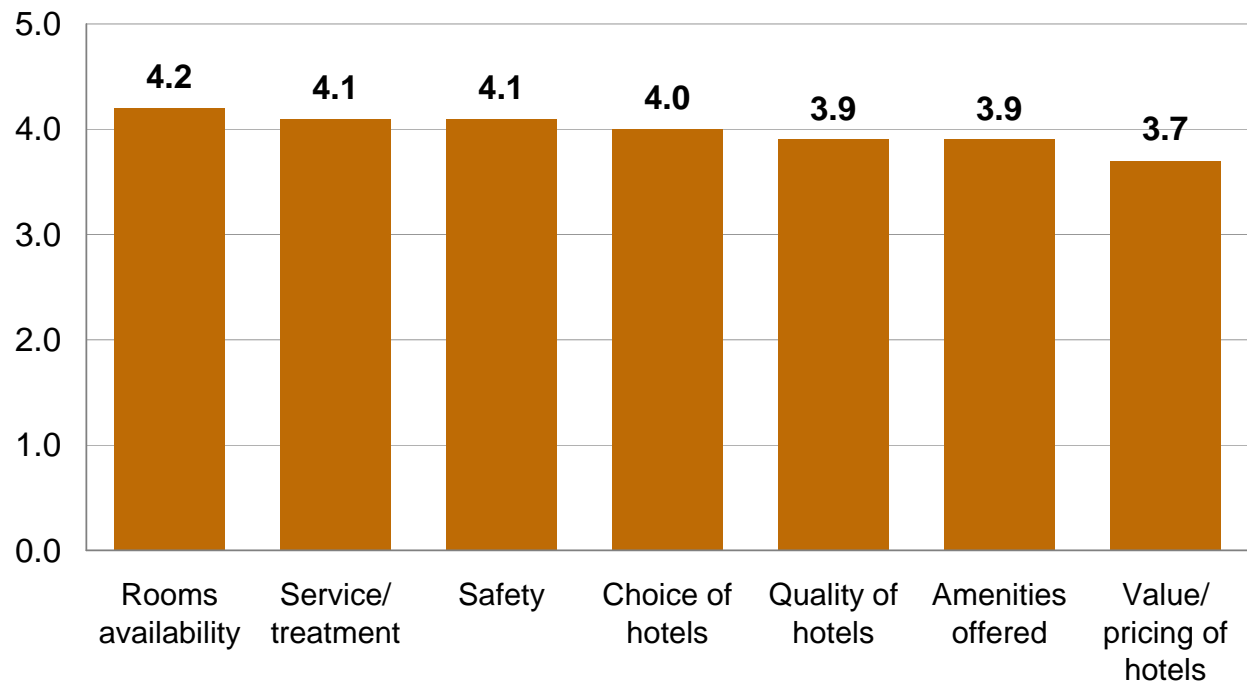
Timing of Reservations

- A majority of inquirers make their hotel/motel reservations three to eight weeks in advance. The average is 5.2 weeks.



Satisfaction with Aspects of Lodging

Satisfaction Rating - 1 to 5 scale where 5 equals "Most Satisfied"



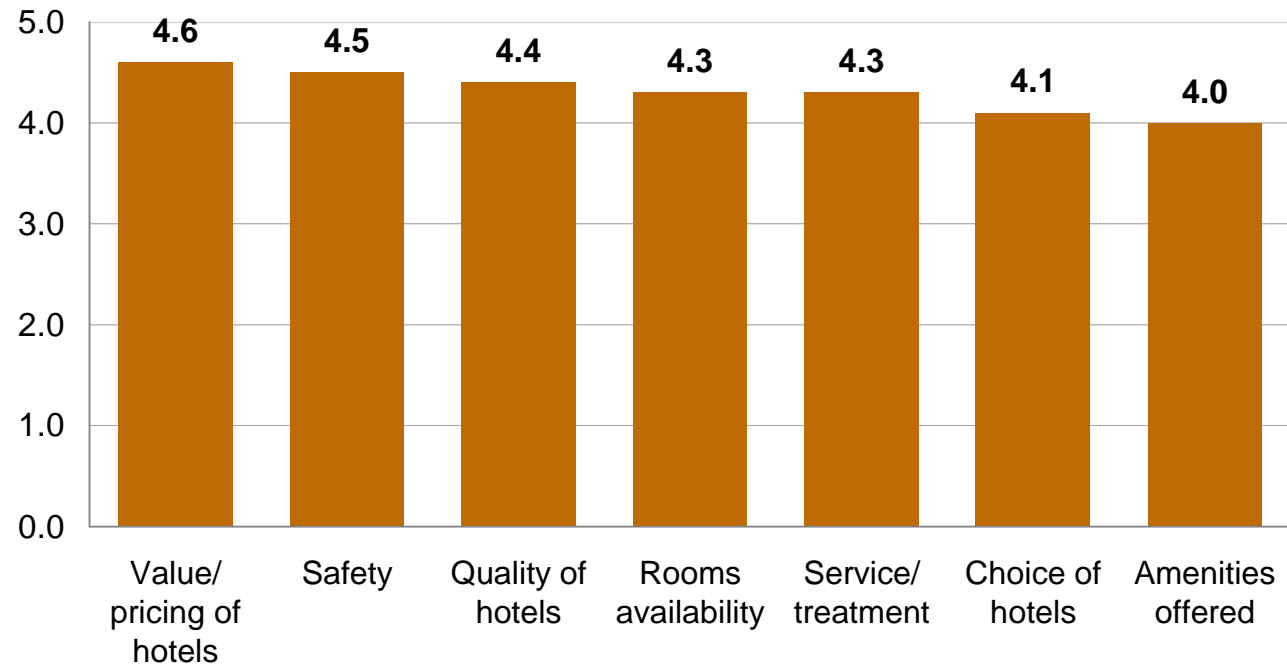


Importance of Aspects of Lodging

- Santa Cruz area hotel customers feel that value/pricing is the most important aspect of lodging. This is also the item that they are the least satisfied with. Thus, improving value/prices for customers has the greatest potential impact on improving their levels of satisfaction.

Importance of Aspects of Lodging

Importance Rating - 1 to 5 scale where 5 equals "Extremely Important"



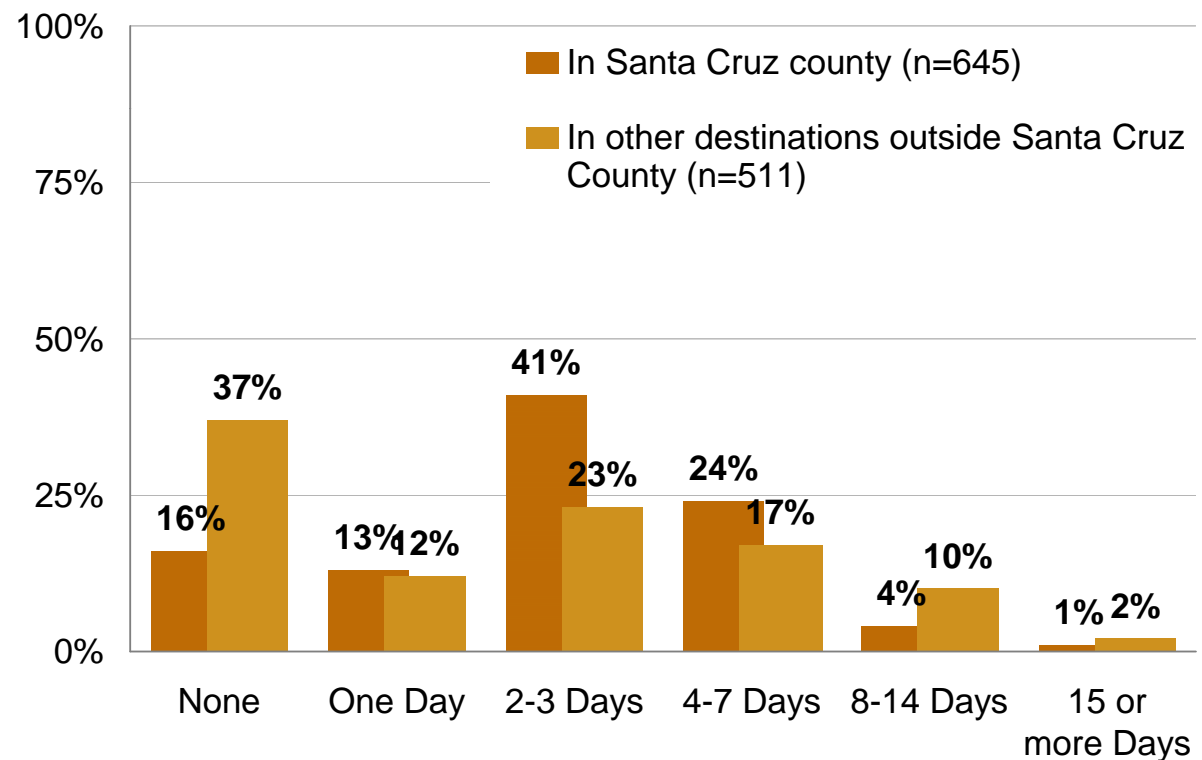


Nights Spent

- Among the visitors to Santa Cruz County that were surveyed, 84% stayed overnight on their last trip to the area (81% in 2000), while the remaining 16% were day visitors.
- Sixty-three percent of visitors also stayed overnight in places outside Santa Cruz County on the same trip.

Nights Spent

- Visitors stay an average of three nights in Santa Cruz County and three nights in places outside of Santa Cruz County on the same trip (i.e., 6 days overall trip length, down from 7.6 days in 2000).



Nights Spent

- Below is overnight data for visitors based on where they live...

Area of Residence	N	Average Nights in Santa Cruz County	Average Nights in Other Destinations
San Francisco/Oakland	82	1.9	0.5
Sacramento Area	74	2.9	3.0
Central Valley	58	2.5	2.4
Southern CA	92	2.9	1.6
Other CA Areas	69	1.9	1.3
Western States	77	3.6	3.7
All Other States	188	4.0	4.7

**It should be noted that the data in this table generally has a higher margin of error compared to most of the data for this study, due to the fewer number of responses represented in each row.*

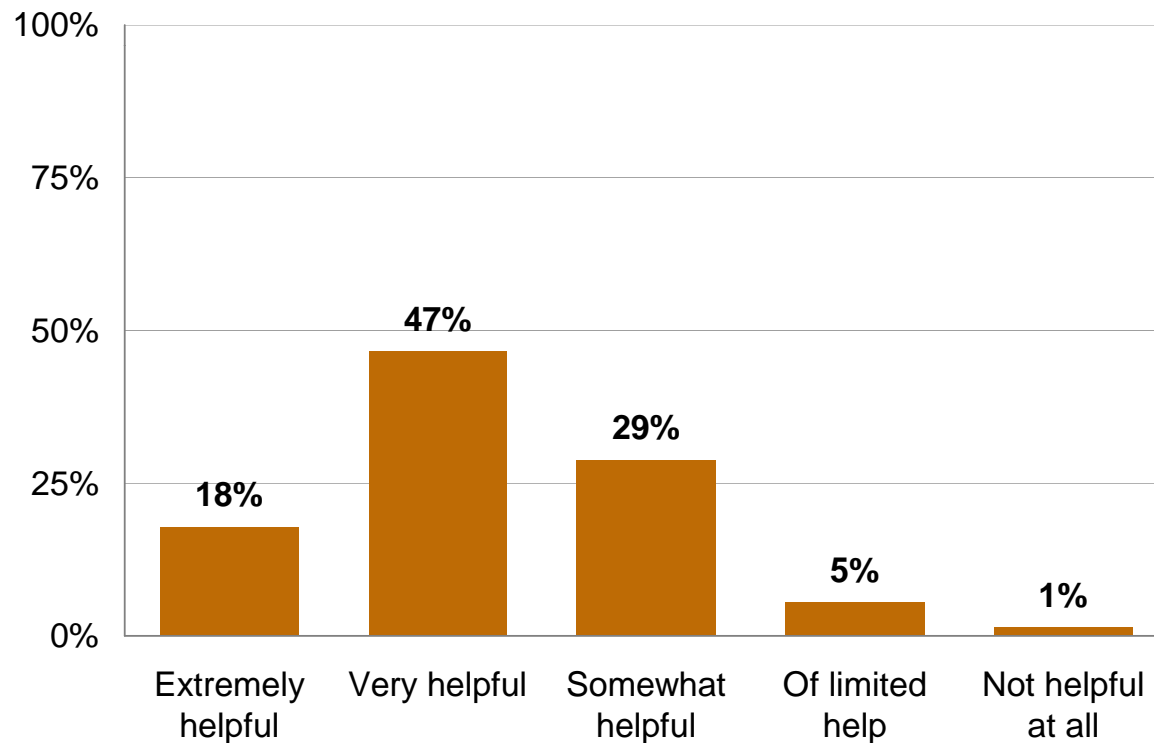


Santa Cruz County

CVC & Traveler's Guide

Helpfulness of CVC to Visitors

- Almost two-thirds of visitors feel the CVC was very or extremely helpful in planning their visit to the area.



Traveler's Guide Influence on Visitors

- 74% of visitors expressed that the Traveler's Guide had some influence over their decision to visit the area (i.e. rated 2 or higher on a 1 to 5 scale where 5 equals extremely influential).

Traveler's Guide Influence (n=394)	Mean Scores	
	All Visitors	1 st Time Visitors
To see more attractions than you expected to in the Santa Cruz area	3.3	3.4
To participate in more activities than you expected to in the Santa Cruz area	3.1	3.2
To take the trip to the Santa Cruz area	2.9	3.2
To stay overnight in the Santa Cruz area	2.7	2.9
To stay longer than you expected in the Santa Cruz area	2.6	2.8

Internet Influence on Visitors

- The influence of the information on the Internet is very similar to the influence of the Traveler's Guide. Visitors were asked about all information they viewed online, not just CVC-published content.

Internet Influence (n=563)	Mean Scores	
	All Visitors	1 st Time Visitors
To see more attractions than you expected to in the Santa Cruz area	3.3	3.4
To participate in more activities than you expected to in the Santa Cruz area	3.1	3.3
To take the trip to the Santa Cruz area	3.1	3.4
To stay overnight in the Santa Cruz area	3.0	3.2
To stay longer than you expected in the Santa Cruz area	2.3	2.6

Influencing Visitors to Stay Longer

- 34% of all visiting inquirers are influenced by the Traveler's Guide to stay at least one more night, and 33% are influenced to do so by the Internet.
- Both the Internet and the Traveler's Guide influence an average of 1.7 extra nights stayed in the area. In the 2000 survey, the average additional nights stayed by those that were influenced by the Traveler's Guide was 2.1 nights. Campbell Rinker speculates that the recession is probably the main cause for this drop.

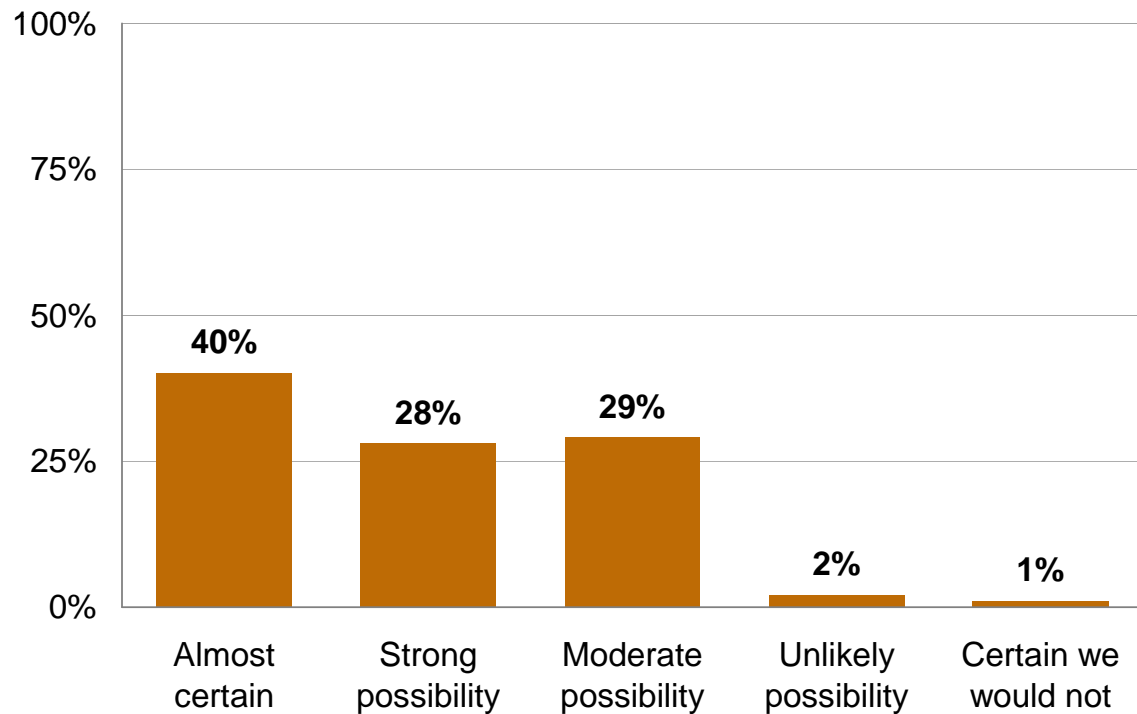
Extra Nights Stayed (among those influenced to do so)	Influenced by the Traveler's Guide (n=135)	Influenced by the Internet (n=185)
Average Additional Nights	1.7	1.7
One	53%	53%
Two	33%	30%
Three	7%	8%
Four or more nights	7%	9%

Likelihood of Visiting when Requesting the Traveler's Guide

- With almost all people that request a Traveler's Guide, there is a possibility of them visiting the Santa Cruz area (97%).
- With about six out of ten people that request the Traveler's Guide, there is an opportunity for the Guide to encourage visitation to the area (i.e. the possibility is strong to moderate).

Likelihood of Visiting when Requesting the Traveler's Guide

(n=632)



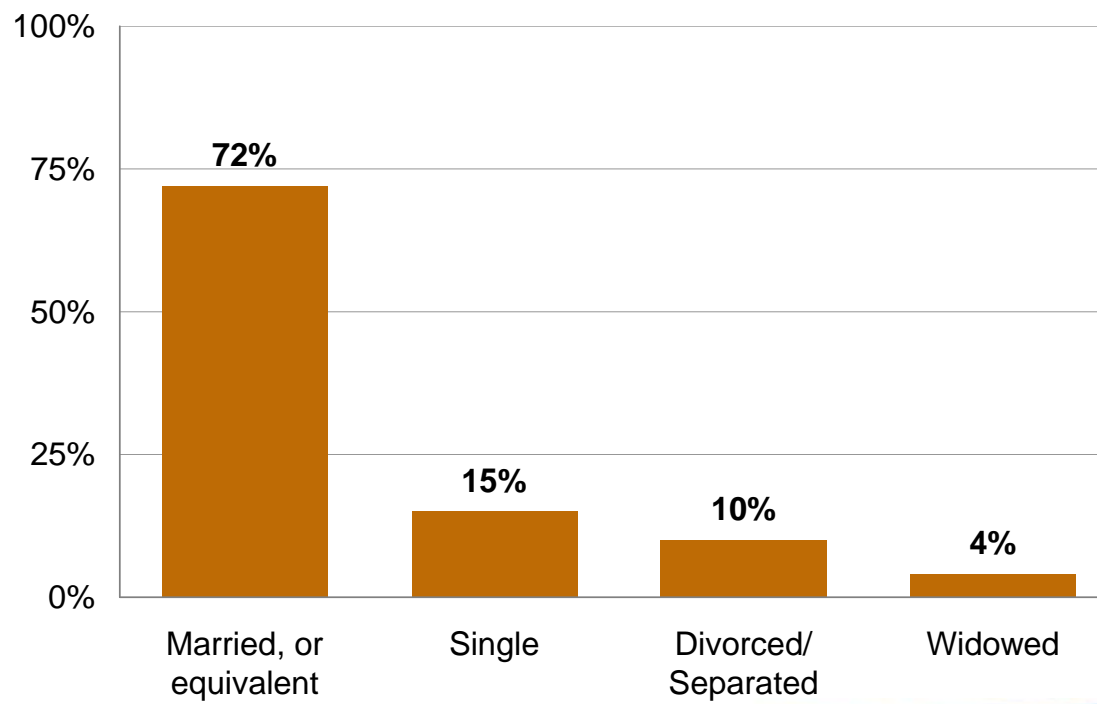


Santa Cruz County

Demographics

Make-up of a Traveler's Group

- Over three-fourths of visitors come to Santa Cruz County as families or couples.



Number of Travelers in Group

- On average, visitors have about five people in their group. The average drops to four people if groups of 15 or more are excluded. First-time visitors average about four people in their groups.

Average Size of Group (n=562)	All Visitors	First Time Visitors
Under the age of 18	1.4	0.8
18 or over	3.4	3.3
Total number of people in group	4.8	4.1

- Twenty-nine percent of visitors are under the age of 19, compared to 24% in 2000.

Location of Residence

- Fifty-seven percent of those requesting information from the CVC came from outside of California. Visitors from within California come from all over the state.

Area of Residence (n=1180)	Overall %
San Francisco/Oakland	8%
Sacramento Area	8%
Central Valley, California	6%
Southern California	13%
Other California Areas	7%
Other Western States	12%
All Other States	45%

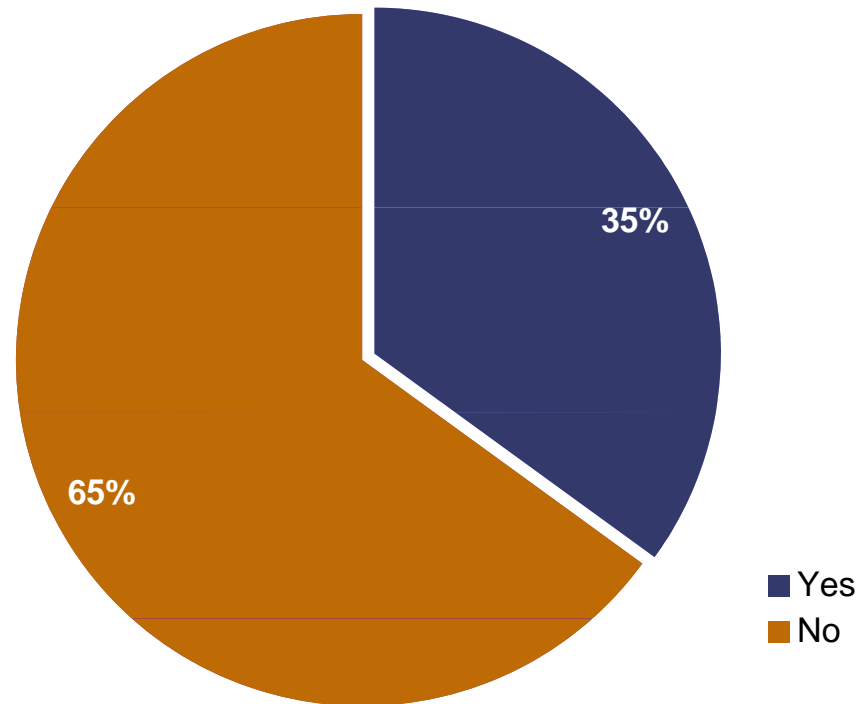
Gender and Marital Status

- Since many respondents to this survey will be responding both for themselves and their spouse, we find it most useful to present a hybrid of the results. Those identified as unmarried below can be single, divorced, or widowed.

Type of Survey Respondent (<i>n</i> =1092)	Overall %
Married Couple or Equivalent	72%
Unmarried Female	21%
Unmarried Male	7%

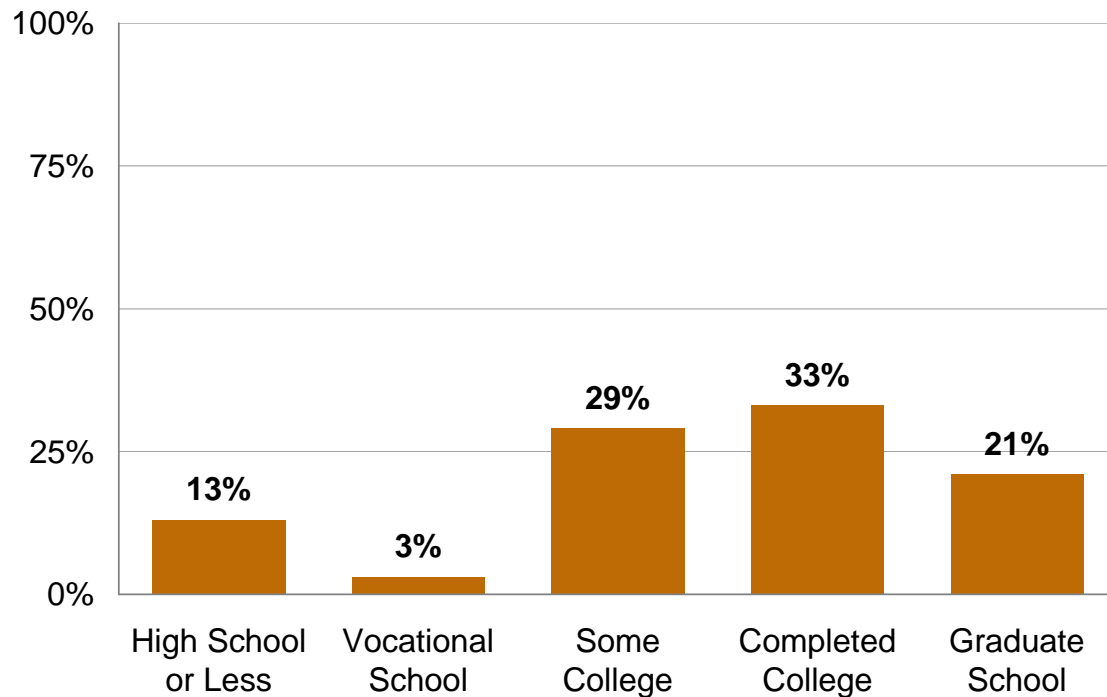
Children in the Home

- Almost two-thirds of those that contact the CVC have no children living in the home.



Education Level

- A majority (54%) of those that contact the CVC have a college degree.

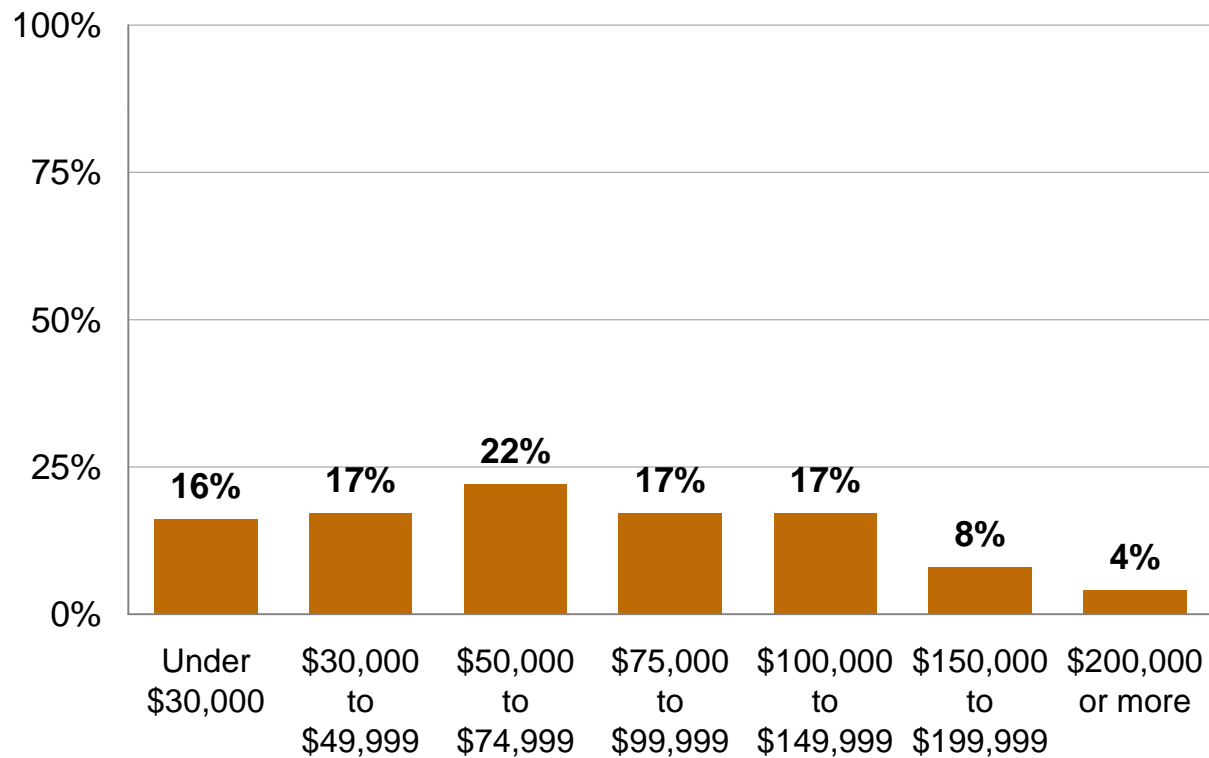




Household Income

- People of all levels of income contact the CVC...
 - A third have household incomes under \$50k
 - 39% have incomes between \$50k and \$99k
 - 29% have incomes of \$100k or more

Household Income





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