

Tourism Sentiment Survey Results

March 2021

Conducted by Campbell Rinker

Get to Know *Visit Santa Cruz County*



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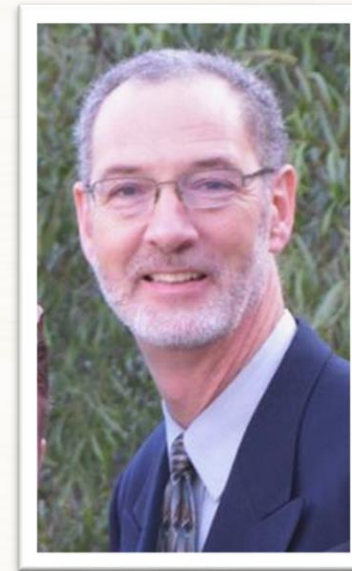
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Getting to Know Campbell Rinker

- Campbell Rinker has specialized in research for tourism entities and nonprofits since 1991.
- The Southern California firm is known for its programs helping small to mid-size tourism entities retain visitors.
- This is the fourth time they have collaborated with Visit Santa Cruz County.



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- Travel Sentiment and Plans
- Attitudes about Travel, Lodging, Dining and Retail
- Planning for Travel
- Local Attitudes on Visitors and Travel
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Background and Methodology

**March
2021**

9%
Response

4.5K
Responses

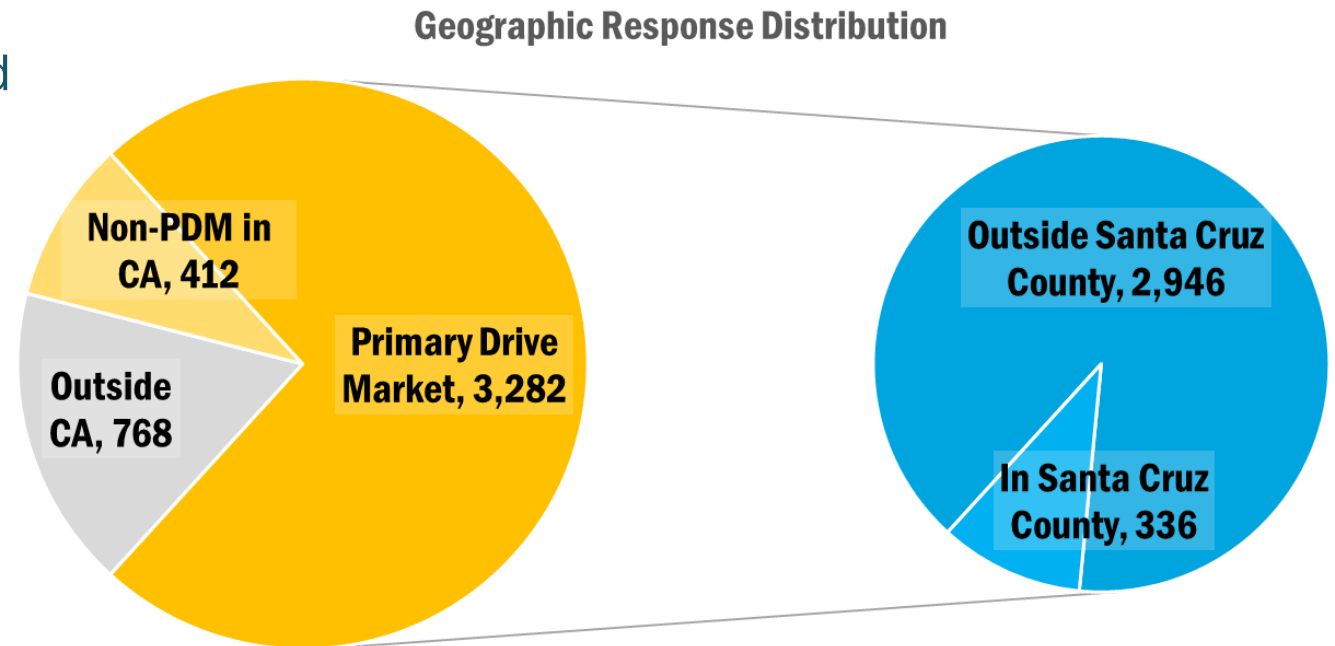
±1.8%
Margin of Error

99%
Conf. Level

- Visit Santa Cruz County commissioned Campbell Rinker to conduct an online traveler sentiment survey in March 2021.
- VSCC emailed invitations to 57,497 newsletter subscribers and 2019/2020 website survey respondents and received 5,000 responses for a 9% response rate.
 - While such a sample involves some degree of bias due to the subjects' known interest in visiting Santa Cruz County, their opinions regarding conditions for travel willingness are seen as accurate.
- As an incentive, one respondent won a weekend beachfront getaway in Santa Cruz County.
- Rigorous data cleaning isolated 4,501 qualified, valid respondents. 336 of these were Santa Cruz County residents.
 - International respondents and unlikely travelers (identified on pp. 6-12 of this document are excluded from response data.
- This response level delivers a ±1.8% margin of error at the 99% confidence level.

Respondent Location

- The total number of respondents was 4,501.
- The primary drive market was established as a 200-mile radius from Santa Cruz County.
- A few respondents provided no zip code and could not be categorized.
- A handful of international respondents are not shown in the results.
- Interestingly, the survey saw seven respondents from Hawaii.



Are you a U.S. resident?~In what country/region do you live?~ What is your home zip code?

Key Takeaways

- 61% of respondents are positive about traveling right now.
- 16% have definite plans for 2021 already, and four in 10 are finalizing plans.
- Travelers are ready for overnight trips.
- Most county residents are willing to welcome visitors.
 - Tourists have fewer safety concerns than locals.
- A majority of VSCC list members trust the Safety Pledge.

Travel Sentiment and Plans

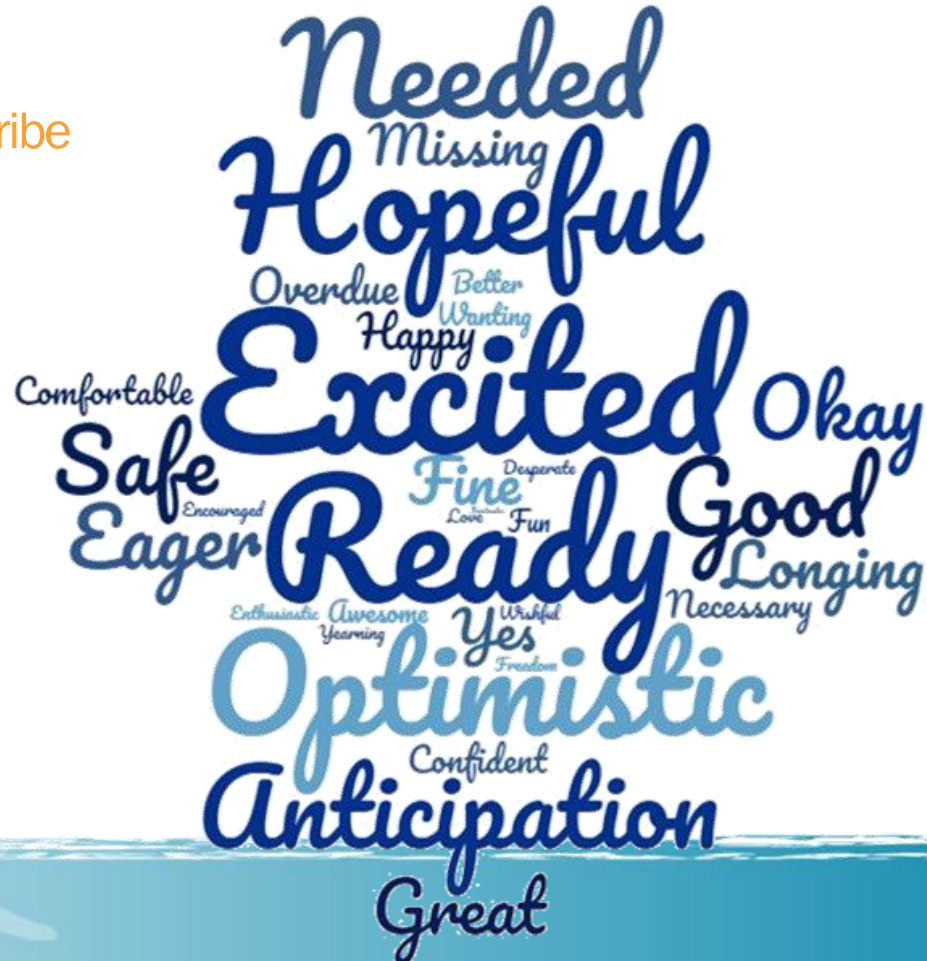
Overall Travel Sentiment

What ONE WORD best describes how you feel about travel right now?

- Most respondents describe positive feelings about immediate travel.

61%

positive



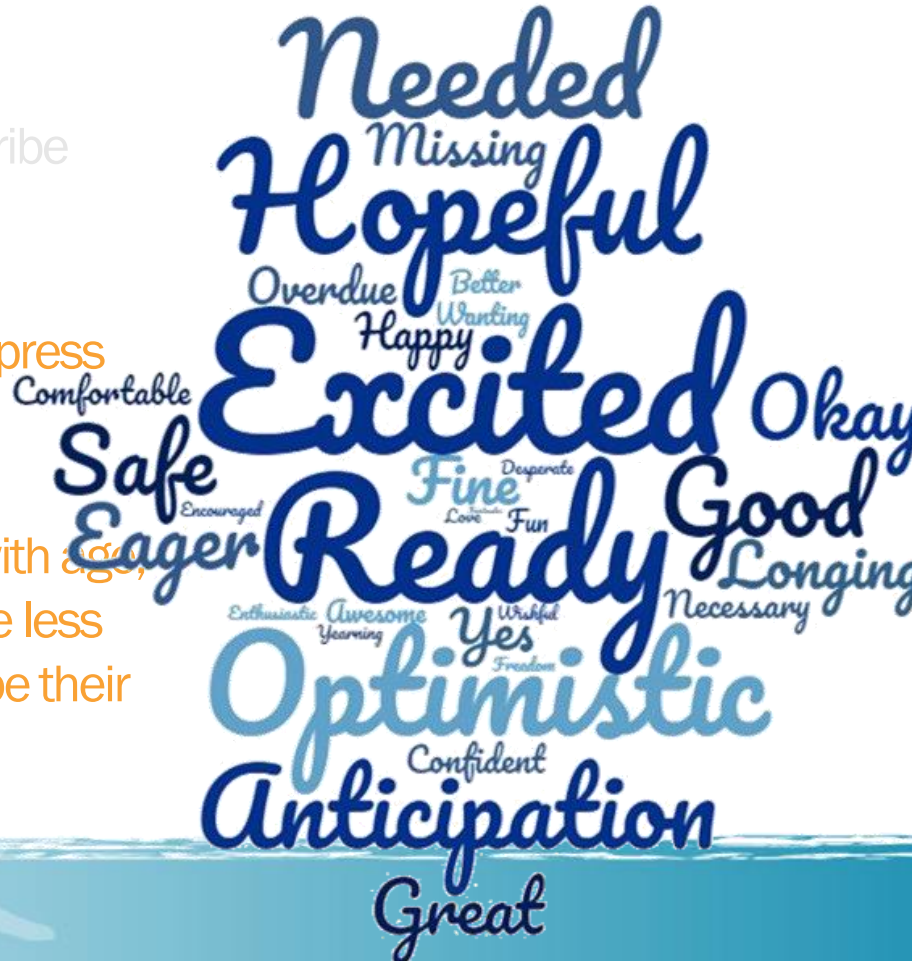
Overall Travel Sentiment

What ONE WORD best describes how you feel about travel right now?

- Most respondents describe positive feelings about immediate travel.
- Less than one in four express negative feelings about hitting the road.
- Travel positivity wanes with age, as older generations use less positive terms to describe their readiness.

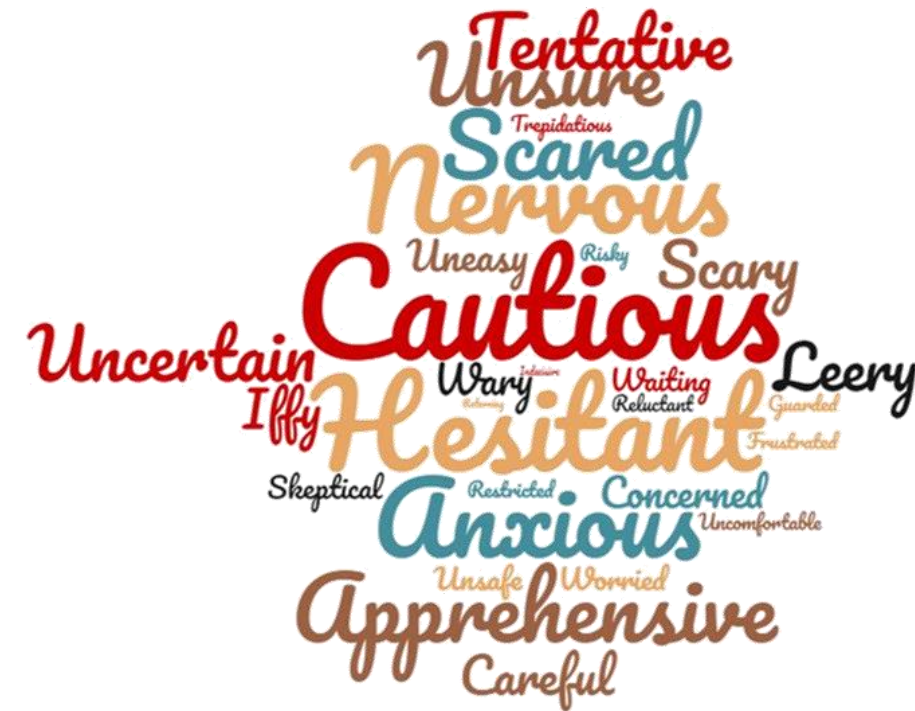
61%

positive

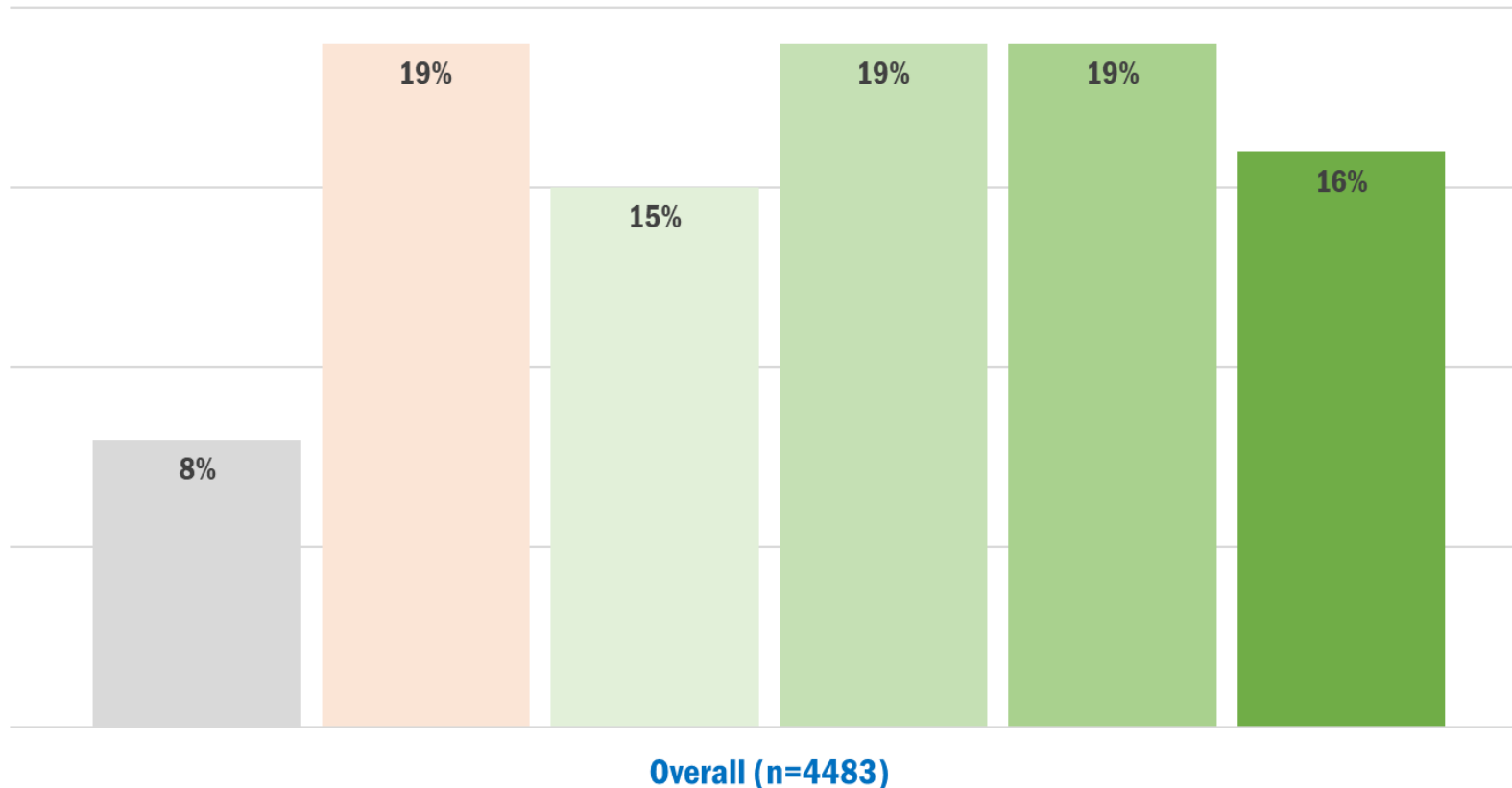


39%

negative



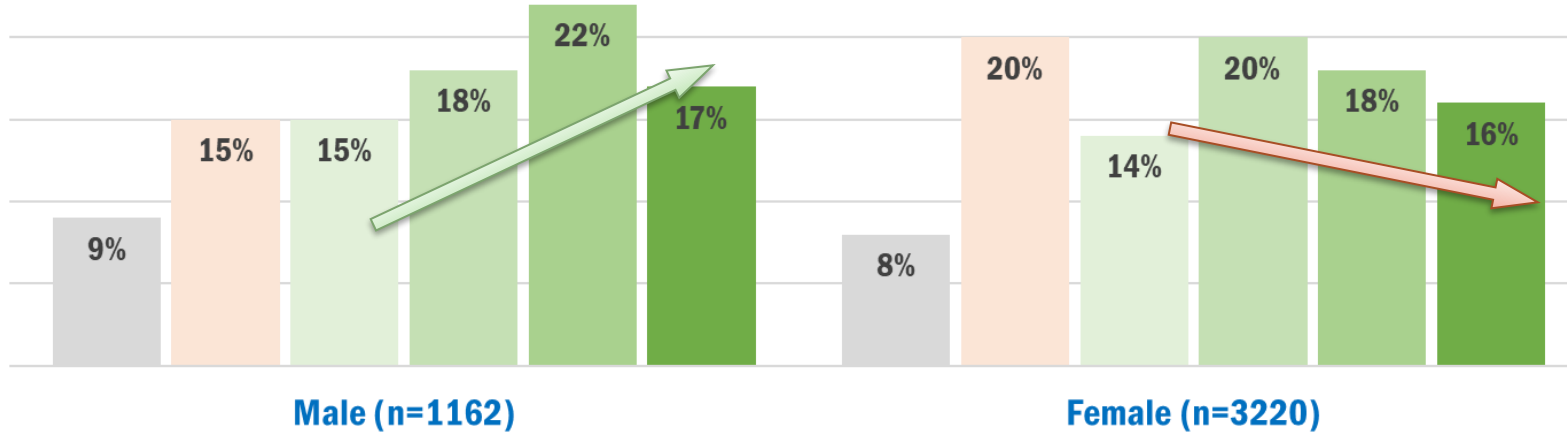
State of Travel Readiness



Which of the following best describes your travel goals for this year?

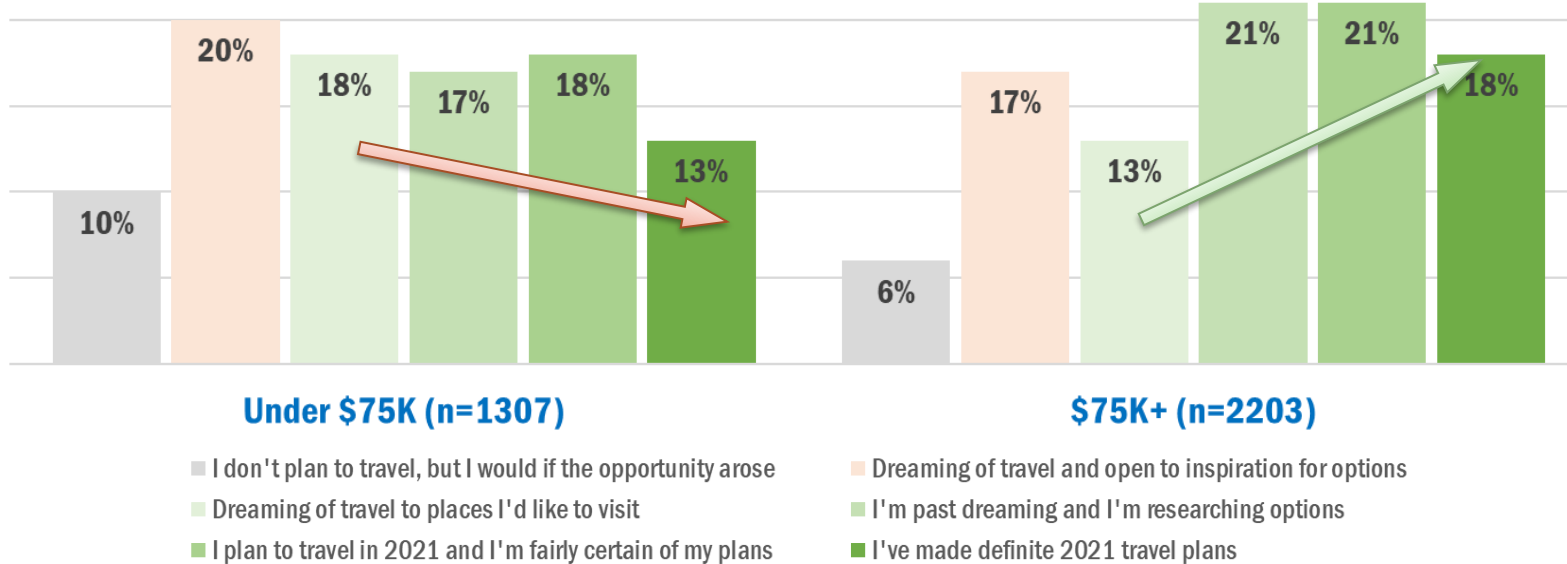
- One in six travelers have made plans for 2021
- Another four in ten are well on the way to finalizing their travel plans.
- About a third of travelers are still dreaming of plans

Travel Readiness by Gender and Income



Which of the following best describes your travel goals for this year?

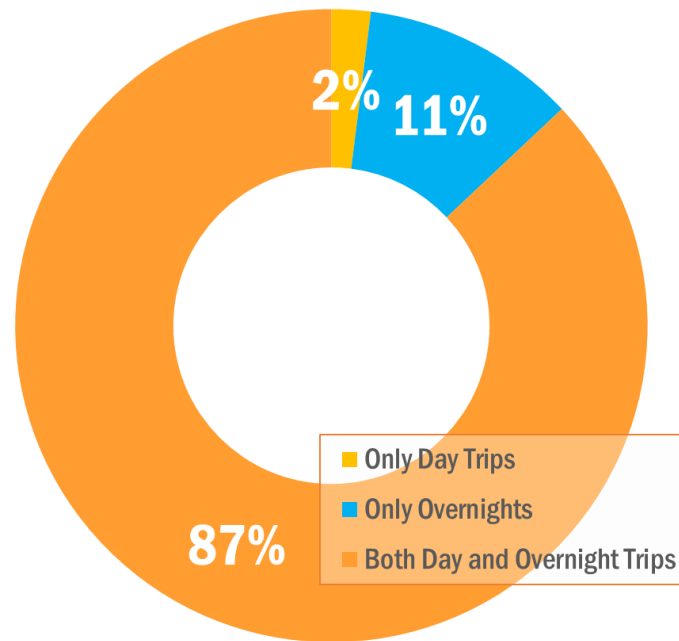
- Men tend to be more certain of their plans than women.
- Higher HHI travelers tend to be more certain of their plans than households that earn lower HHI.



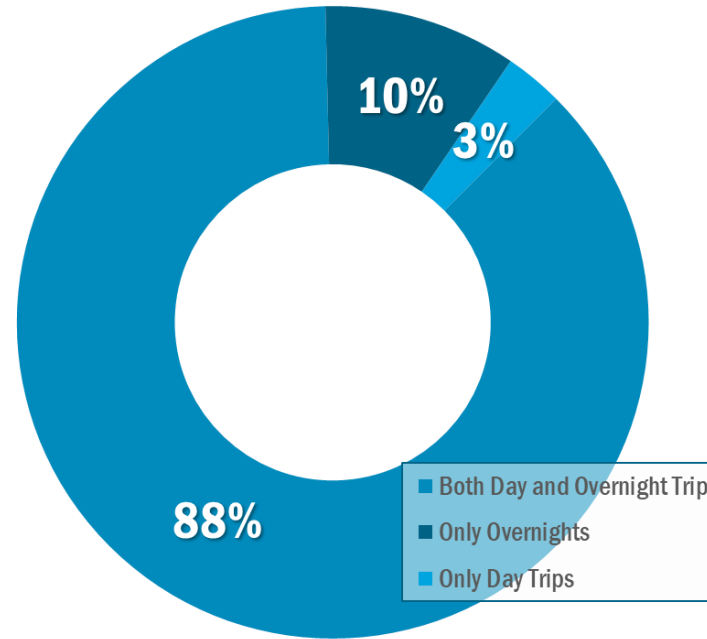
■ I don't plan to travel, but I would if the opportunity arose
 ■ Dreaming of travel to places I'd like to visit
 ■ I plan to travel in 2021 and I'm fairly certain of my plans

■ Dreaming of travel and open to inspiration for options
 ■ I'm past dreaming and I'm researching options
 ■ I've made definite 2021 travel plans

Day Trippers and Overnightriders



All Respondents



Primary Drive Market

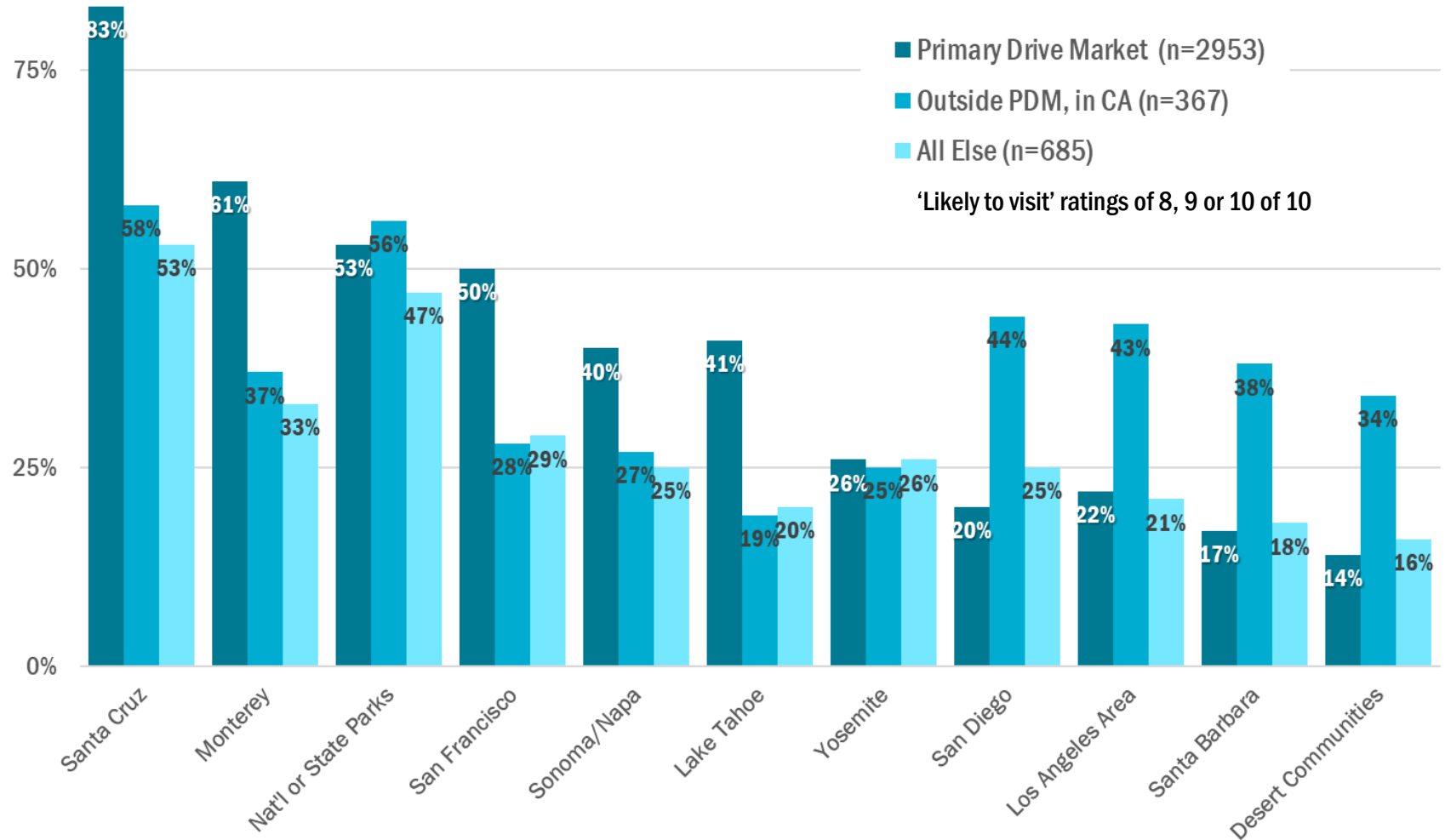
Which of the following best describes your travel intentions during the coming year? (Excludes unlikely travelers)

- Only one in eight potential visitors limit themselves to just day trips or overnight trips.
- Visitors outside the primary drive market, Boomers and those with less education are likeliest to opt only for overnight travel.

Destination Intent

Which of the following best describes your travel intentions during the coming year? (excludes unlikely travelers)

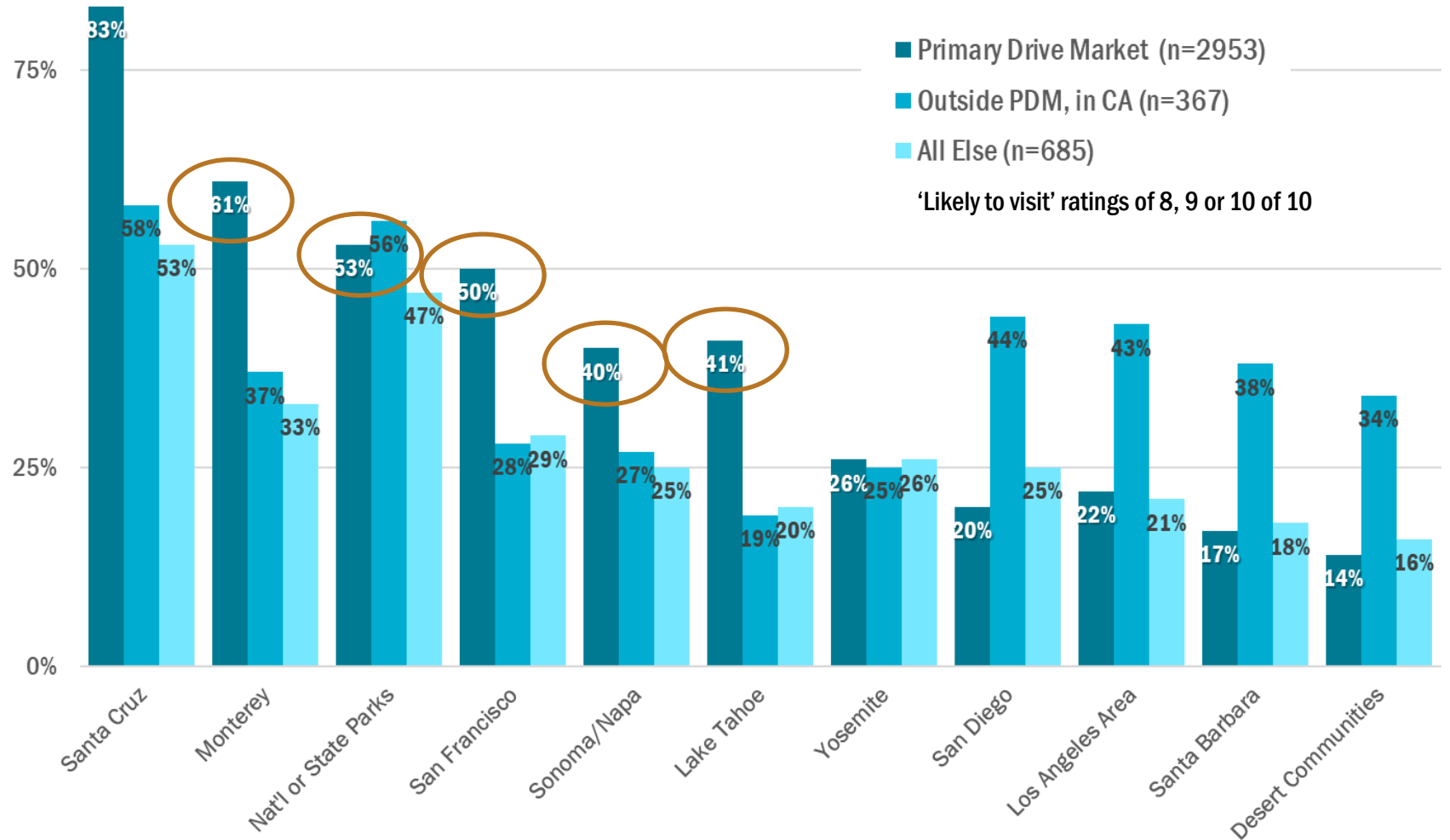
- Over eight in ten travelers on VSCC lists chose Santa Cruz County as their most likely destination in the coming twelve months.



Destination Intent

Rate the California destinations in this alphabetical list for your likelihood to visit them this year.

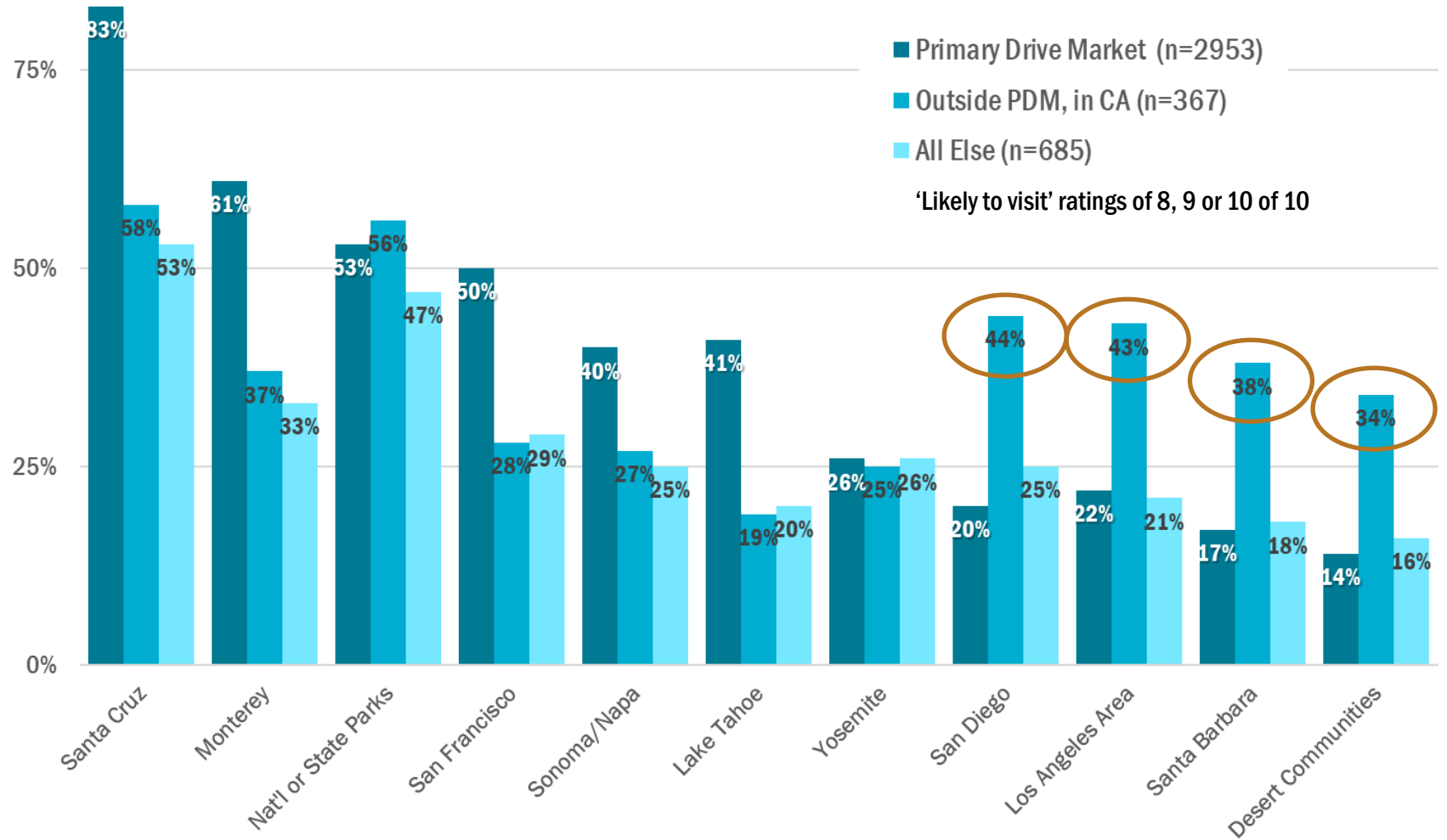
- Over eight in ten prospective travelers on the VSCC lists chose Santa Cruz County as the most likely destination during the coming twelve months.
- Monterey, natural Parks, San Francisco, Napa and Lake Tahoe make up Santa Cruz County's top PDM competitors.



Destination Intent

Rate the California destinations in this alphabetical list for your likelihood to visit them this year.

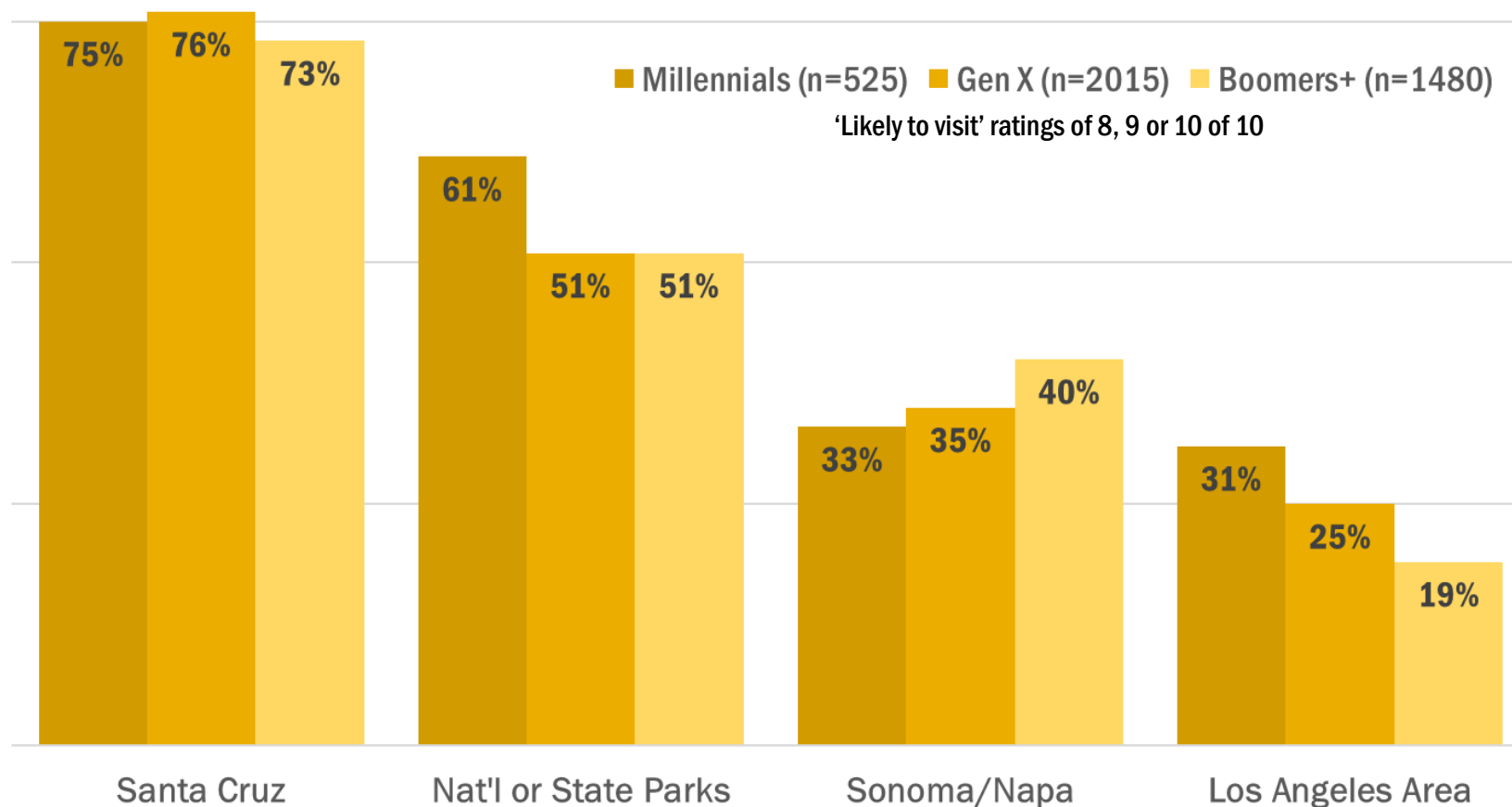
- Over eight in ten travelers on VSCC lists chose Santa Cruz County as their most likely destination in the coming twelve months.
- Monterey, Parks, San Francisco, Napa and Lake Tahoe comprise SCC's chief primary drive market competitors.
- San Diego, the LA area, Santa Barbara and Desert spots are preferred by Californians living outside the PDM.



Destination Intent by Generation

Rate the California destinations in this alphabetical list for your likelihood to visit them this year.

- Millennials are significantly more likely to visit State or National parks or LA.
- Boomers indicated a higher likelihood to take in the wine region compared to Gen X and Millennials.
- Still, none compare overall to the overall appeal of Santa Cruz County.

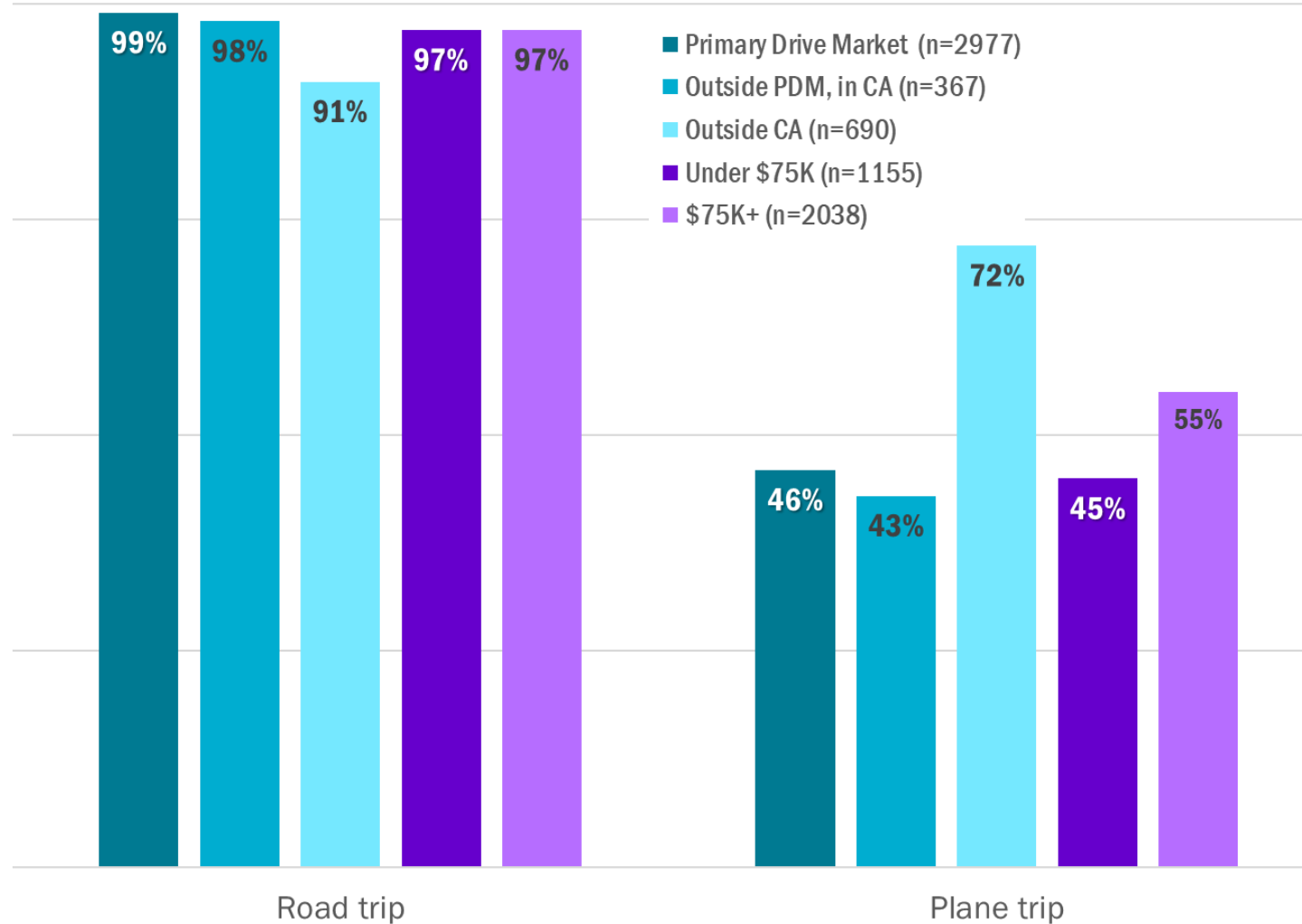


Takeaways on Travel Sentiment

- Analysis of verbatim responses shows that older travelers need more **safety reassurance** than younger travelers, on the road and at their destination.
- Many prospective visitors in the Santa Cruz County PDM – especially women – are **still making travel plans**.
 - The time is ripe for local destination marketers to remind them of your readiness to welcome them.
- Most travelers want the **freedom to pursue either day trips or overnight trips**.
- Santa Cruz County's main PDM competitors are **Monterey, National and State parks, San Francisco, Napa and Lake Tahoe**.
 - Santa Cruz County must woo younger travelers away from outdoor destinations and LA.
 - It must convince older travelers to opt for Santa Cruz County over the wine country.

Travel Attitudes and Preferences

Comfort with Modes of Travel in 2021



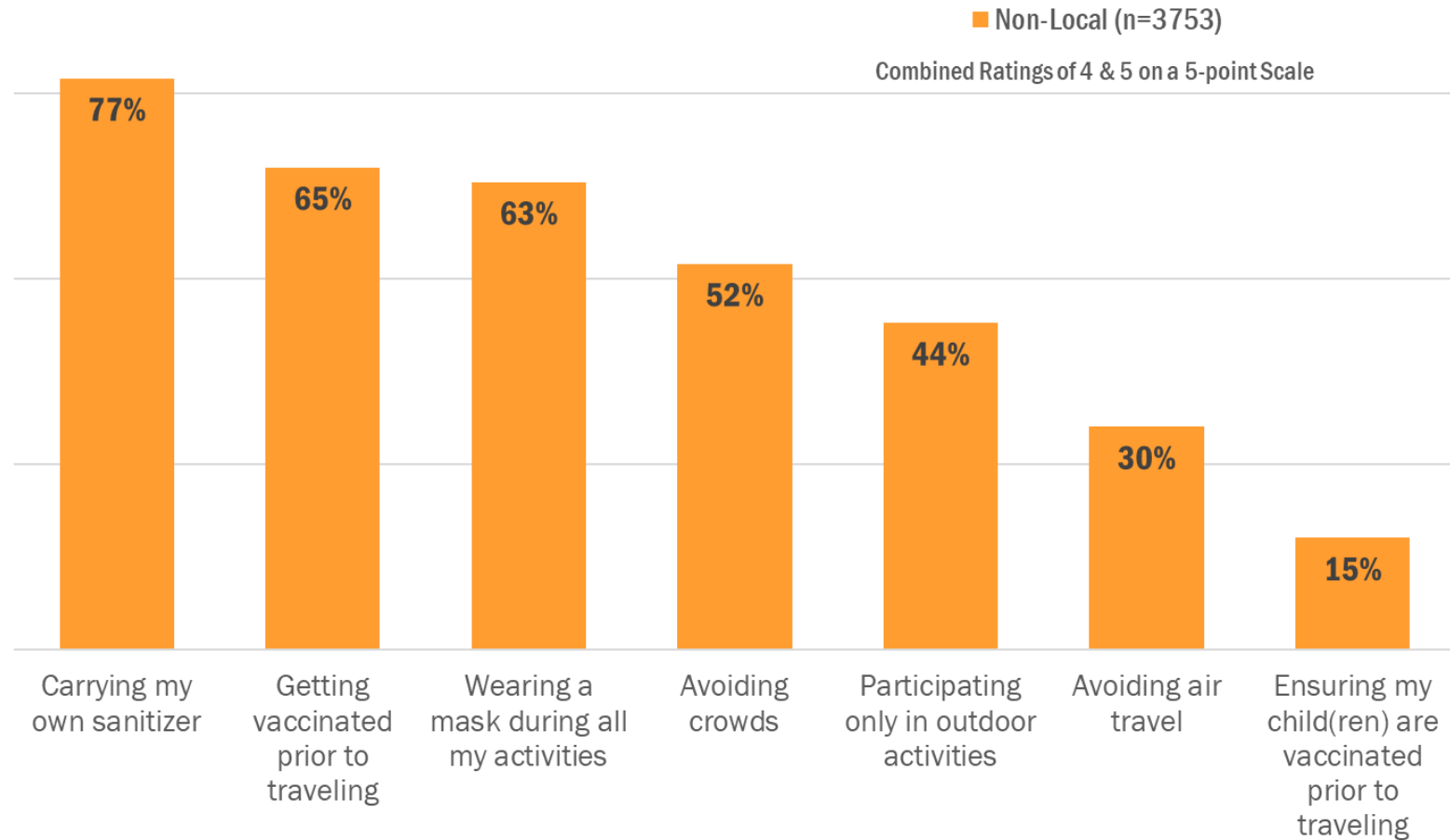
What types of travel are you comfortable with in 2021?
(Select all that apply)

- As might be expected as COVID wanes, travelers are much more open to road trips than they are to plane trips.
- Respondents from outside California are more open to plane trips than Californians are. This may be related to distance more than it is to COVID-19.
- Those with higher incomes are also more likely to fly, potentially due to higher disposable income.

General Safety while Traveling

Please rate the following actions for assuring your safety during upcoming overnight travels.

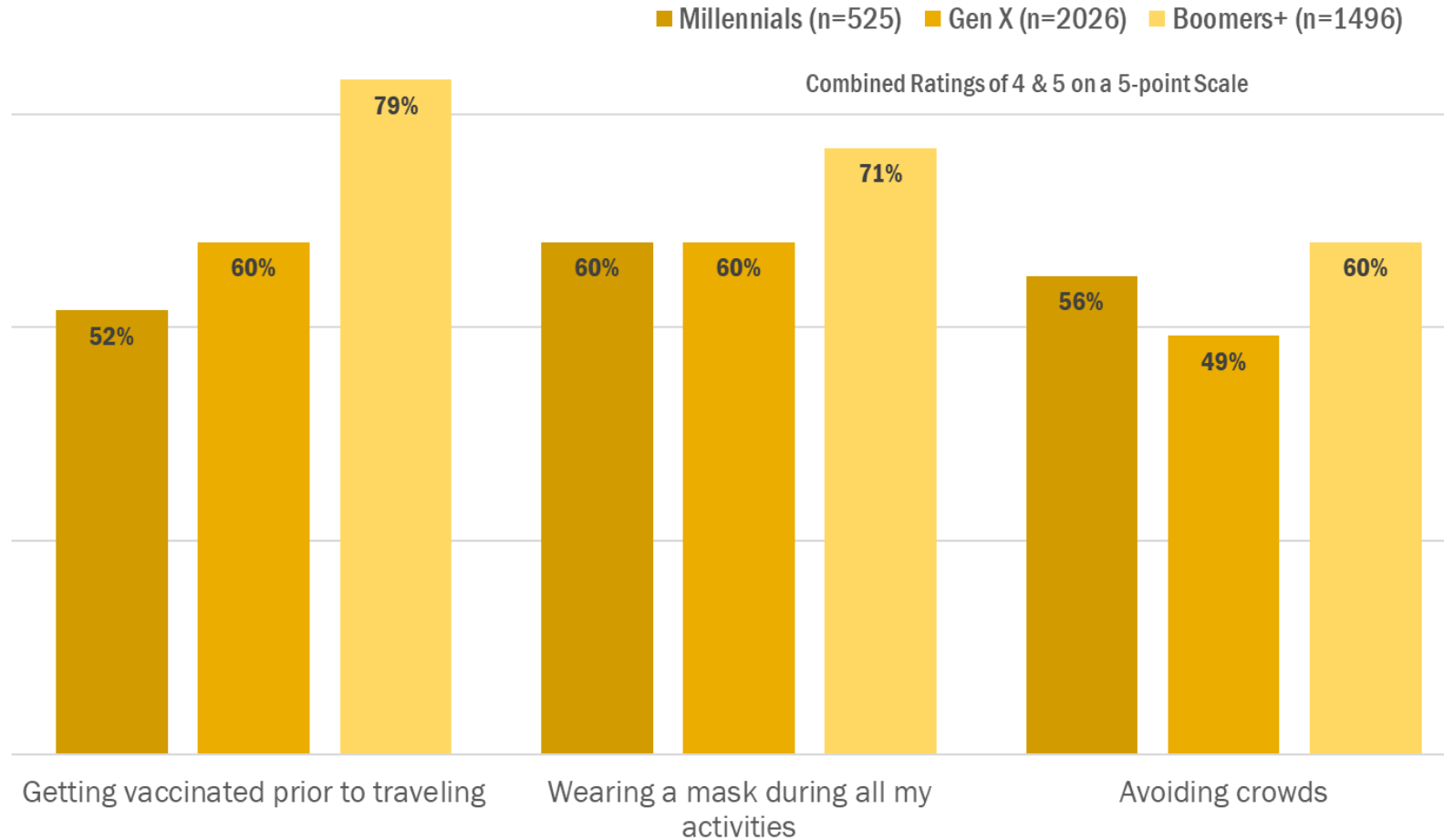
Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"



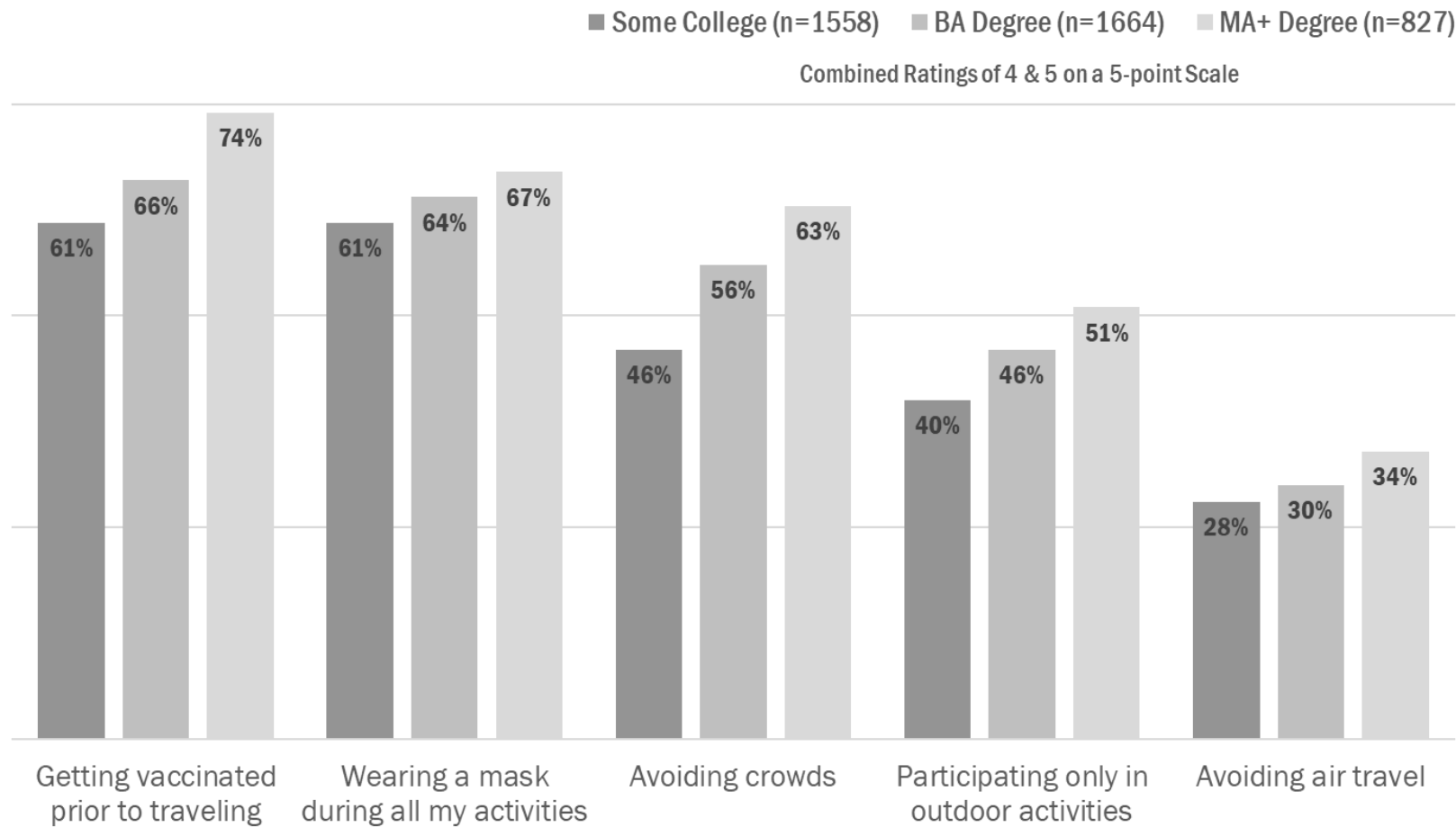
General Safety while Traveling

Please rate the following actions for assuring your safety during upcoming overnight travels.

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General Safety while Traveling



Please rate the following actions for assuring your safety during upcoming overnight travels.

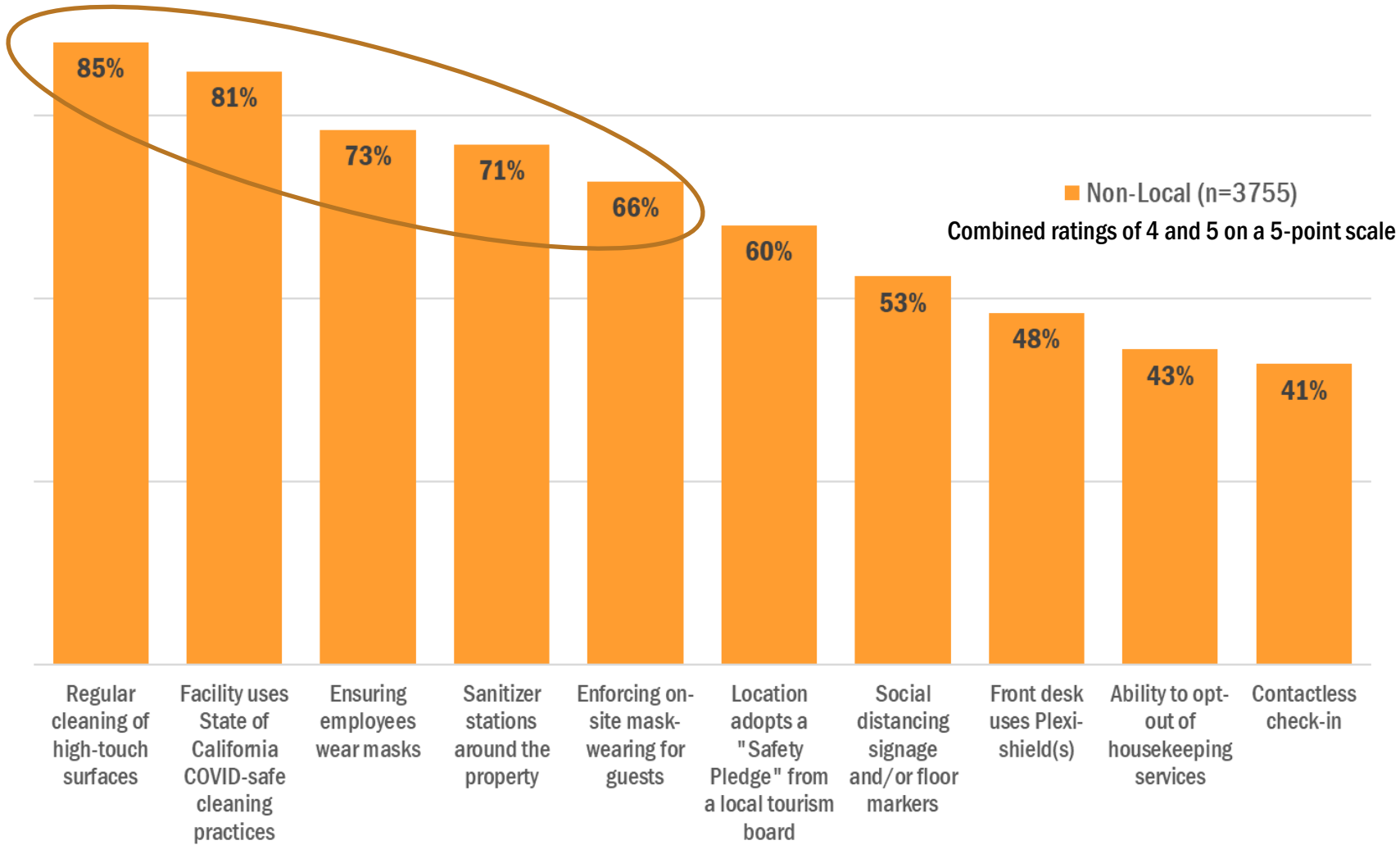
Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- For every set of safety measures rated in this study (e.g., general safety, lodging, dining out and shopping), educated respondents rated all safety measures as significantly more necessary compared to less educated respondents.

General Safety Takeaways

- Santa Cruz County businesses can expect most travelers to come by car.
- Generally, older generations and more educated groups are more safety-conscious.
- Most travelers expect to bring sanitizer and wear a mask.
 - However, they appreciate businesses that have sanitizer and extra masks on hand.
- Crowded indoor activities will likely be less popular, due to half of travelers wanting to avoid crowds.
 - If possible, venues will want to plan for outdoor options to accommodate everyone.
- Few travelers see it as mandatory to vaccinate children prior to traveling.
 - Child-friendly venues may want to offer older patrons more safety assurances.

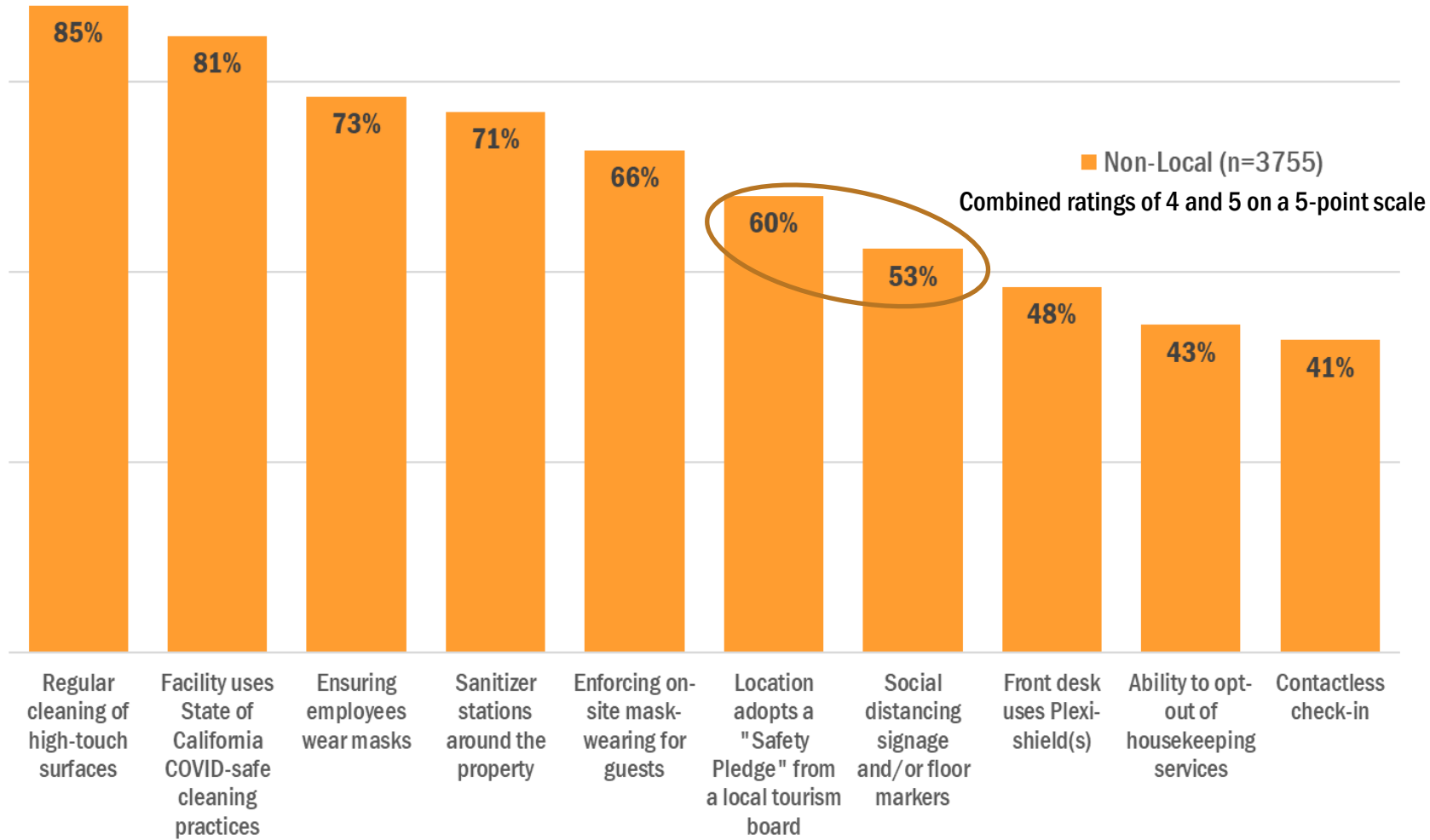
Safety in Lodging



Please rate the following measures for assuring that you are safe staying overnight at a hotel. Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- The most important safety steps are regular surface cleaning, following State guidelines, mask-wearing for staff *and* guests, and sanitizer stations.

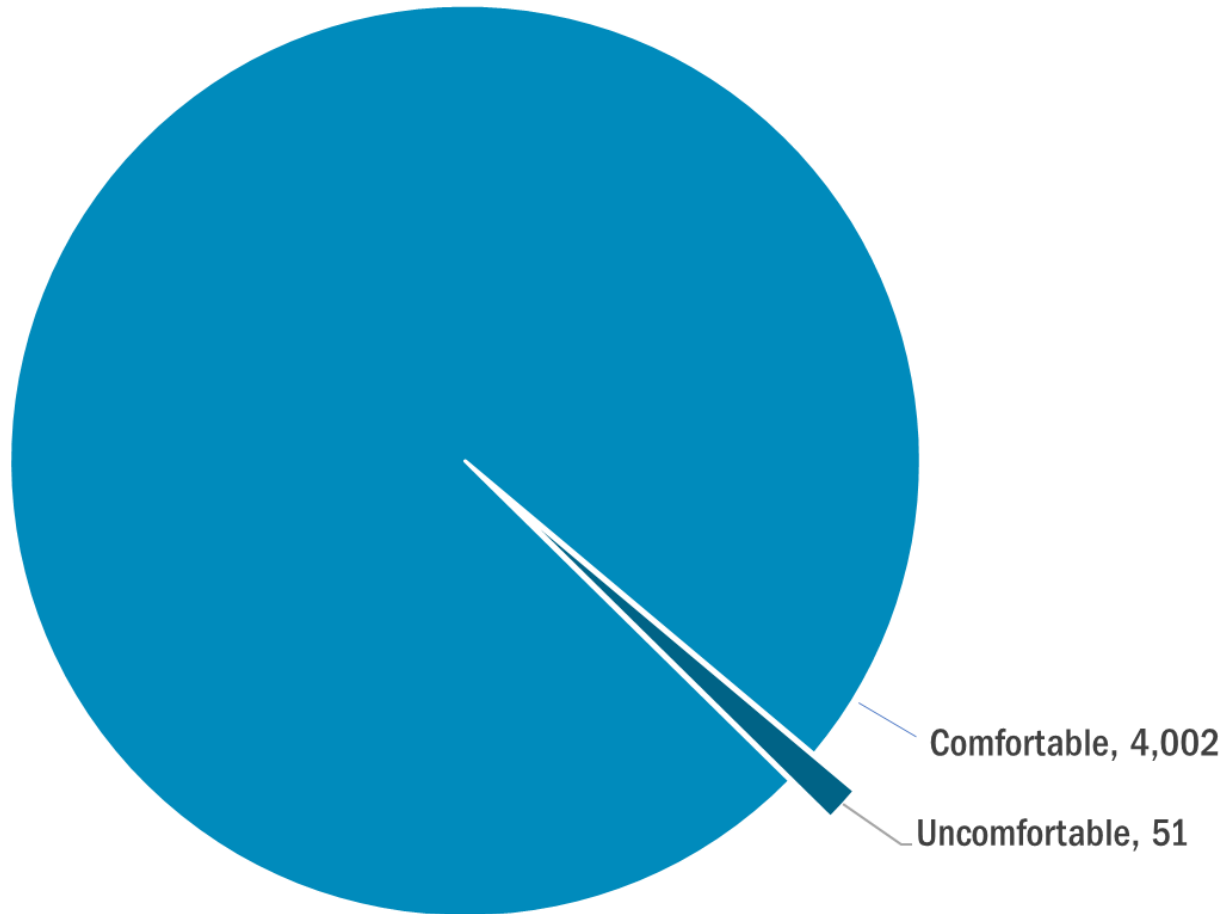
Safety in Lodging



Please rate the following measures for assuring that you are safe staying overnight at a hotel. Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- The most important safety steps are regular surface cleaning, following State guidelines, mask-wearing for staff **and** guests, and sanitizer stations.
- A majority also see adopting a safety pledge and posting social distancing signage as either necessary or mandatory.

Very Comfortable Staying Overnight

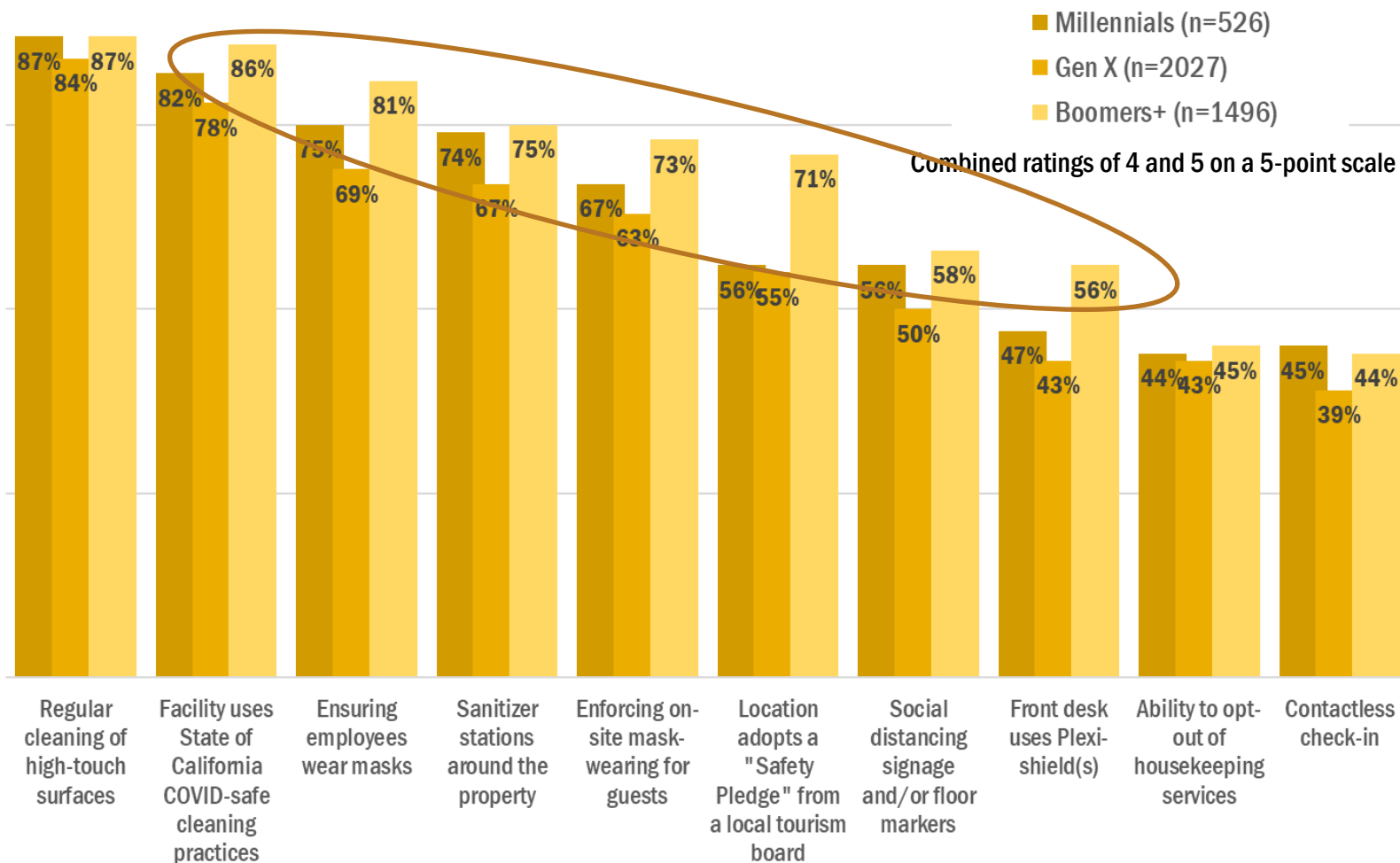


Selectable option after rating all items in previous question:

☐ *I do not feel safe staying overnight at a hotel or similar facility.*

- 98 percent of prospective travelers are comfortable staying overnight at a hotel.
- Only **51** of **4,053** respondents said they felt uncomfortable staying overnight in a hotel.

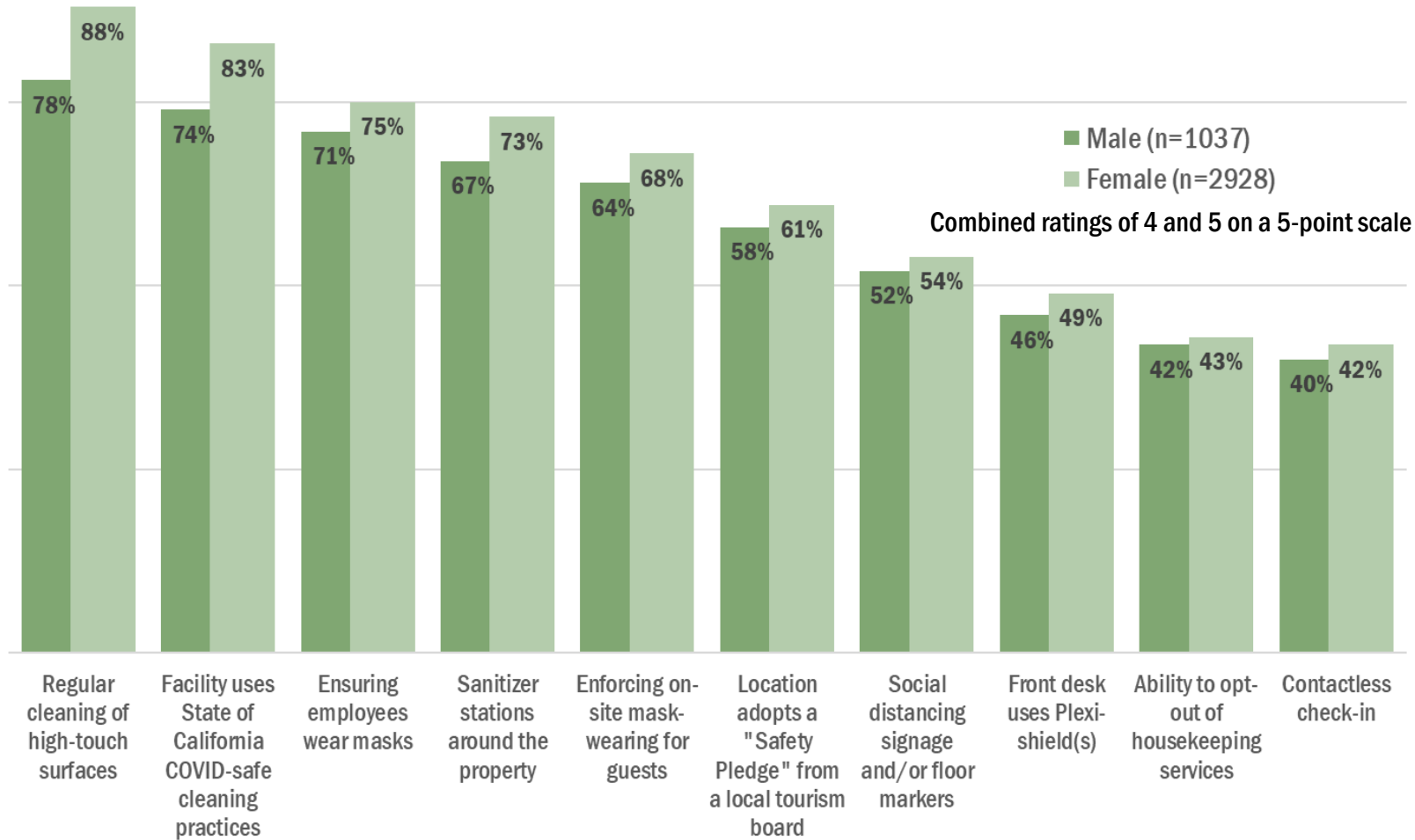
Safety in Lodging by Generations



Please rate the following measures for assuring that you are safe staying overnight at a hotel. Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- Older visitors are significantly more sensitive to the safety measures lodging facilities enforce compared to their younger counterparts.
- This is especially true for cleaning protocols, mask-wearing, adopting a tourism bureau safety pledge and using Plexi-shields.

Safety in Lodging by Gender

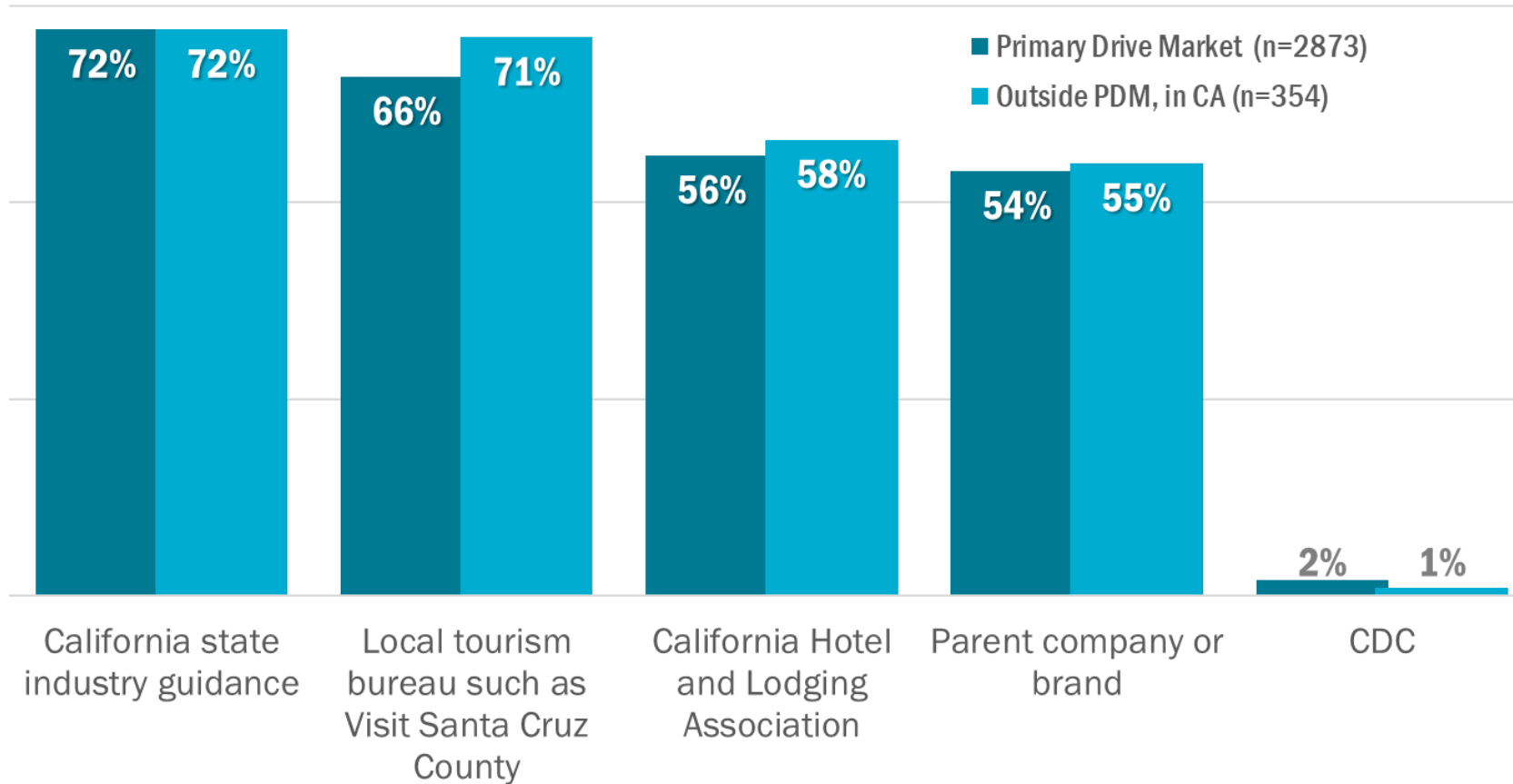


Please rate the following measures for assuring that you are safe staying overnight at a hotel. Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- Women – who typically make more travel decisions and plans - are significantly more sensitive to hotel safety measures than their male counterparts.

Source of Safety Designations

*Which of the following entities would you trust to offer a COVID-safe designation for hotels or other types of lodging?
(Select all that apply)*



- A majority would trust a safety designations from either the State, Visit Santa Cruz County County, CHLA or a hotel brand.
- Guidance from the State of California and Visit Santa Cruz County is seen as much more trustworthy than guidance from other listed entities.
- Visitors don't see the CDC as offering trustworthy guidance.

Essential Lodging Facility Actions

- A very high majority – 70 to 85 percent of respondents – see these actions as necessary or mandatory before they felt safe staying overnight...
 - Visibility is reassuring.
 - Dedicate certain housekeeping staff to continuously touch-up and sanitize high-touch public surfaces in full view of the public.
 - Especially consider doing this during high-traffic times.
 - Post notice that your facility exceeds or follows California state COVID-safe guidelines.
 - Mandate employee mask-wearing.
 - Place and maintain highly visible sanitizer stations on the premises.

Recommended Lodging Facility Actions

- A strong majority – 60-70 percent of respondents – see these actions as necessary or mandatory before they felt safe staying overnight...
 - Train managerial staff in how to delicately ask that patrons wear masks.
 - Maintain a supply of free masks for patron use.
 - Adopt the Safety Pledge from Visit Santa Cruz County and post signage about it.

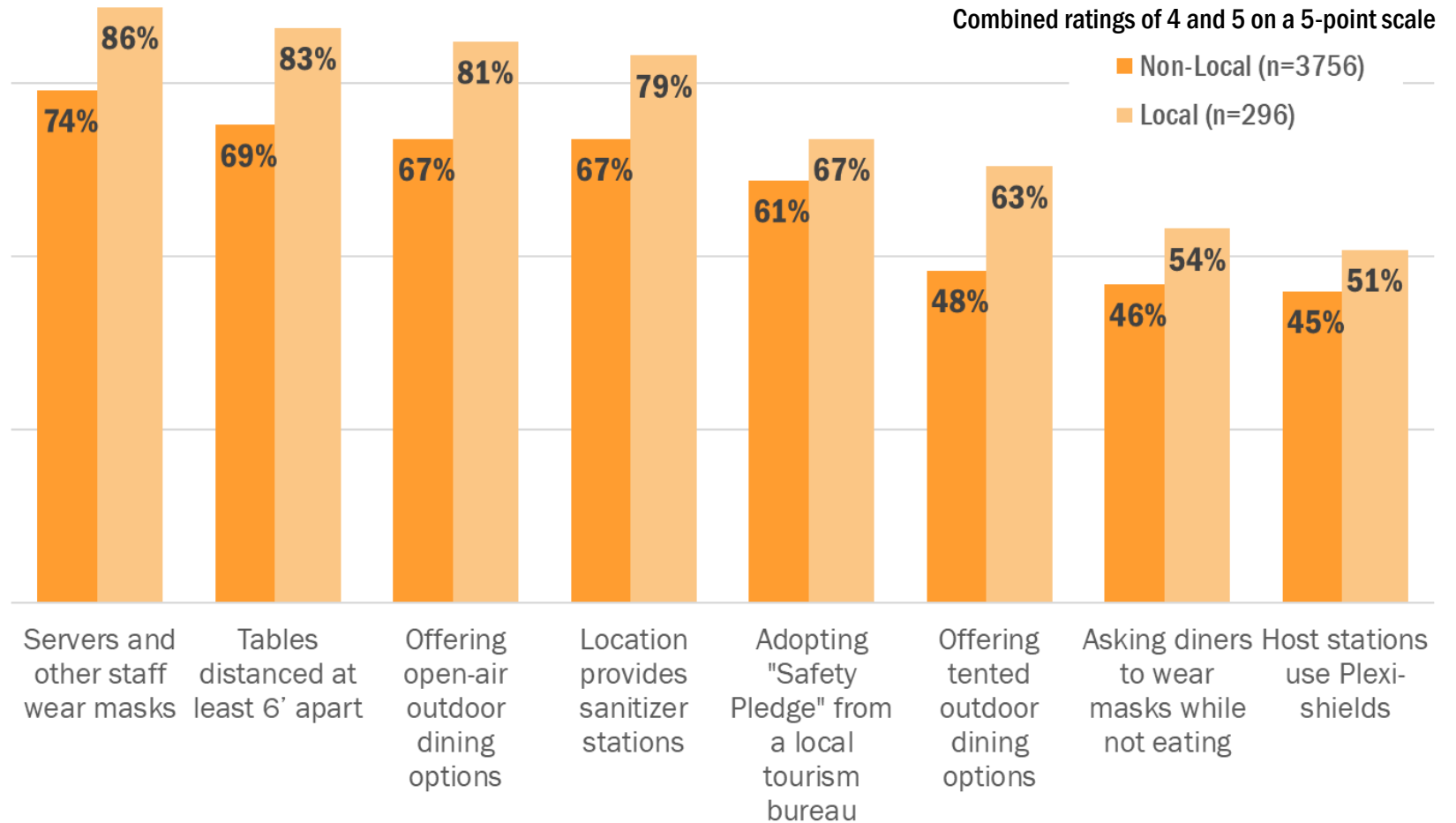
Suggested Lodging Facility Actions

- Just over half of respondents would find these types of actions necessary or mandatory before they felt safe staying overnight...
 - Install social distancing floor markers. Replace them when they wear out.
 - Use Plexi-shields at check-in stations.

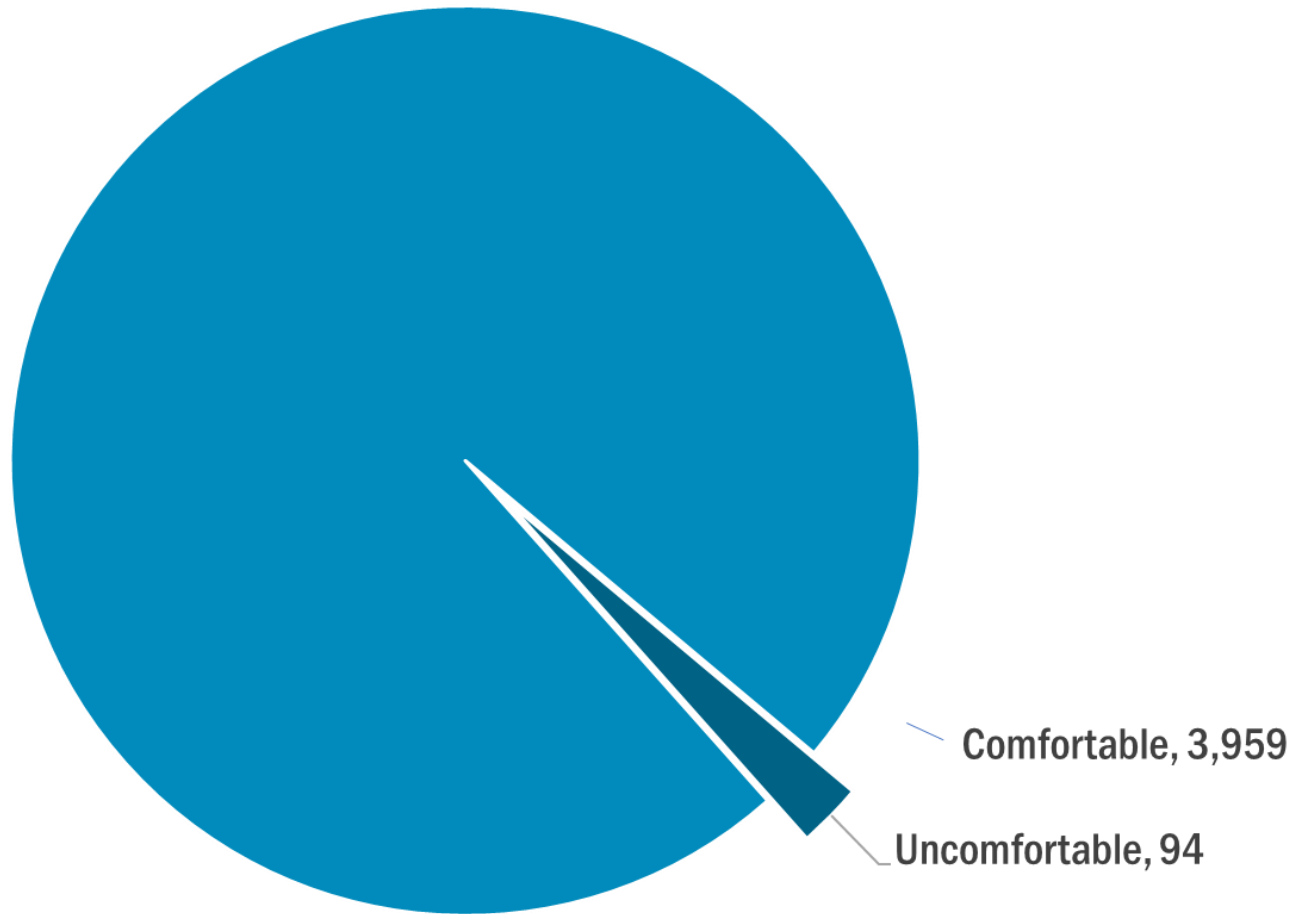
Safety While Dining

Please rate the following measures for assuring that you are safe while dining at a restaurant. Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- Most visitors see masking, distancing, open-air options, sanitizer and adopting a safety pledge as either necessary or mandatory in assuring their dining safety.
- Most responding Santa Cruz County respondents see each of these measures as necessary or mandatory.



Visitors and Locals are Comfortable Dining Out



Selectable option after rating all items in previous question:

☐ *I do not feel safe dining at a restaurant.*

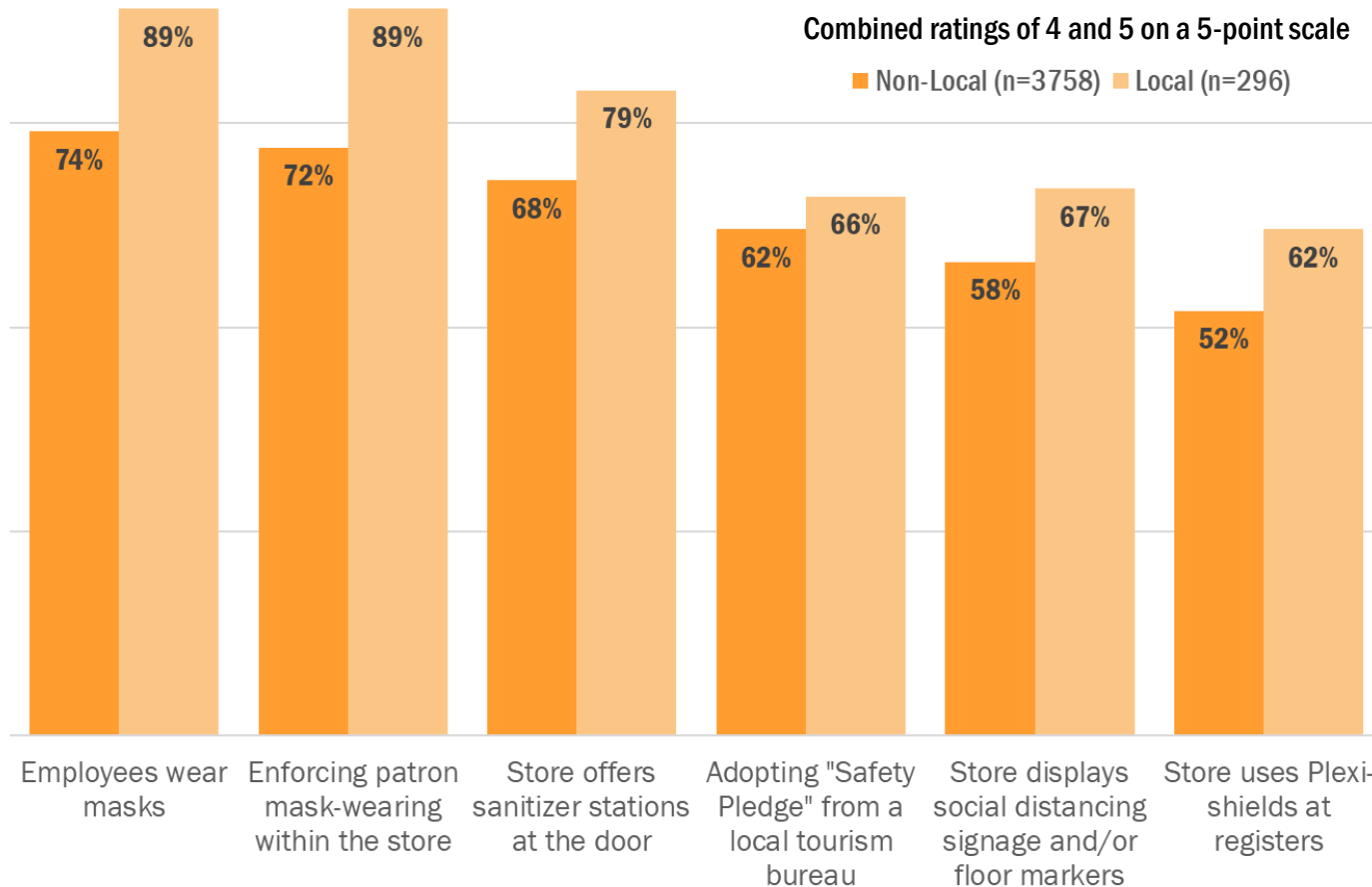
- Only **94** of **4,053** respondents said they felt uncomfortable eating at a restaurant and would not do it.

Takeaways for Dining Locations

- Local customers need more reassurance than visitors.
- Restaurants are advised to enact safety measures such as the following...
 - Require employees to wear masks.
 - Set tables six feet apart.
 - Establish outdoor covered dining areas.
 - Provide numerous sanitizer stations to guests.
 - Adopt the Safety Pledge from Visit Santa Cruz County.
- Consider ways to promote the safety measures you take. Local customers are likely to recognize these efforts and be especially grateful for the effort.

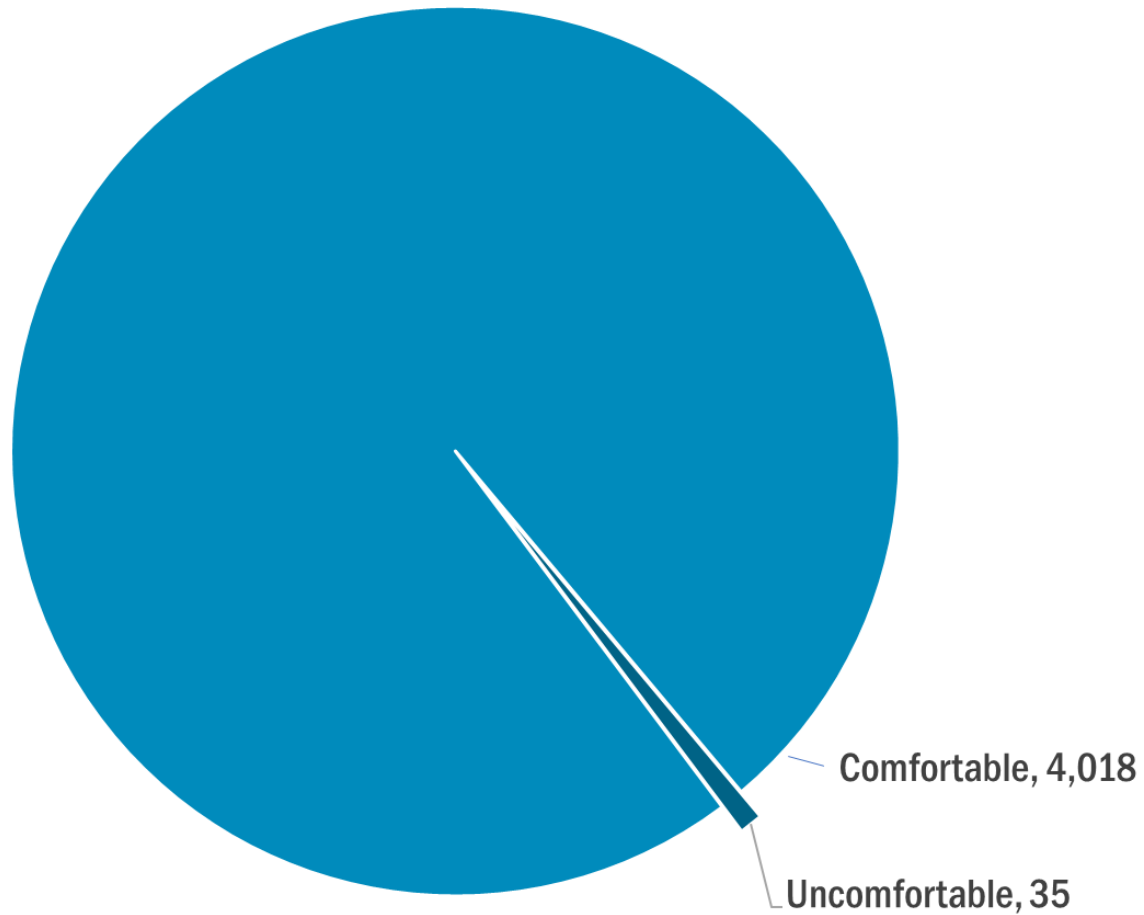
Safety When Shopping

Please rate the following measures for assuring that you are safe while visiting a retail shop on a trip.
Scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"



- Wearing masks is the most reassuring action that retail shops might take, according to travelers.
- Residents of Santa Cruz County are even more emphatic in agreeing that masks are either very necessary or mandatory.
- Over 50% of respondents agree that sanitizer stations, adopting the Safety Pledge, posting social distancing signage and using Plexi-shields at registers is at least very necessary.

People are Comfortable Shopping



Selectable option after rating all items in previous question:

☐ *I do not feel safe visiting a retail establishment.*

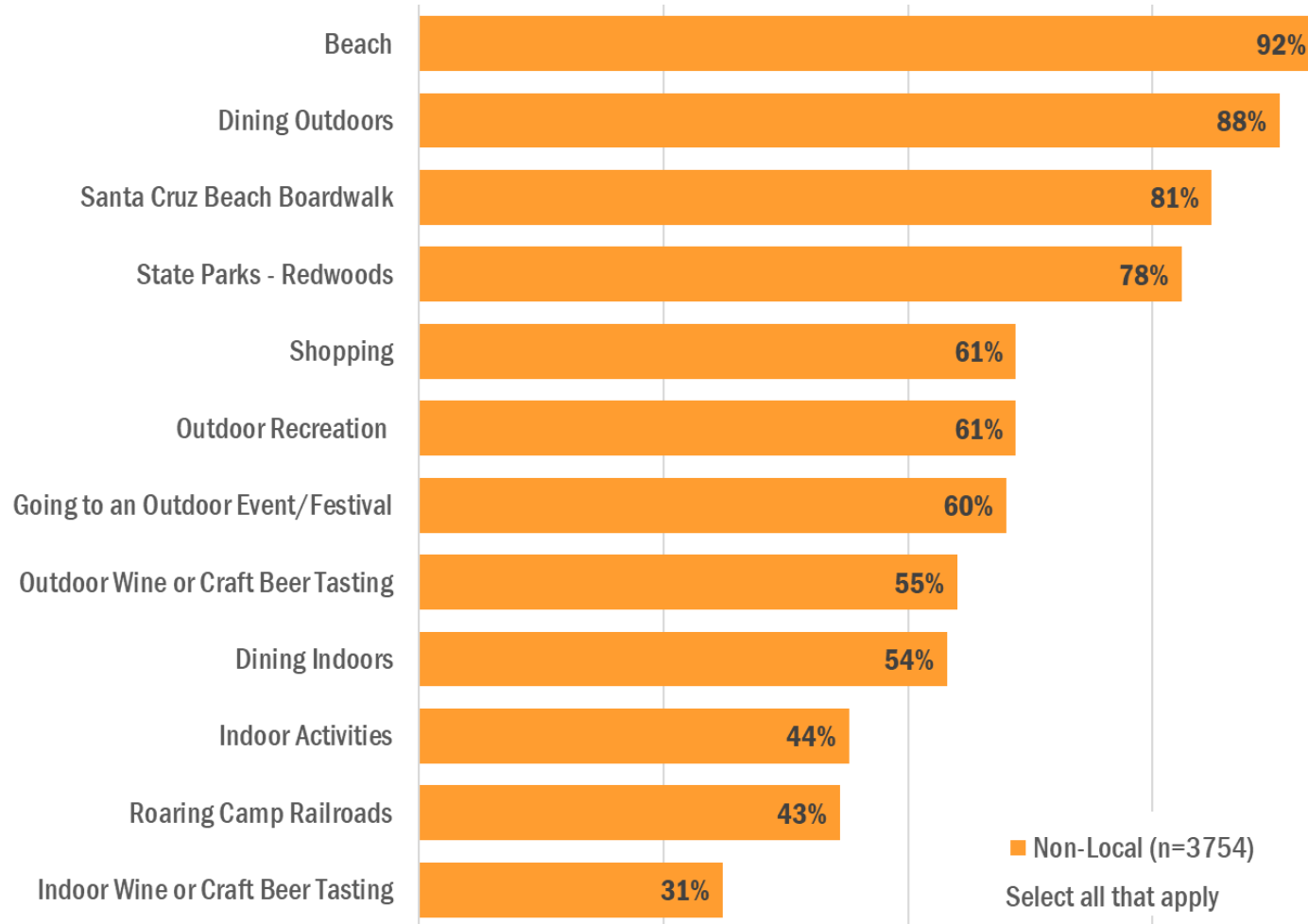
- 99 percent of people are comfortable shopping.
- Only **35** of **4,053** respondents said they wouldn't feel safe in a retail shop.

Takeaways for Retailers

- Most travelers and locals agree that retail stores need safety measures such as...
 - Staff wearing masks, and customers encouraged to wear masks through signage.
 - Sanitizer stations in the store.
 - Retailers adopting the VSCC Safety Pledge.
 - Posting distancing reminders and markers.
 - Plexi-shields at registers.
- Travelers note that retailers should also keep their stores clean, ventilated, offer extra masks if needed, limit occupancy, see that staff get vaccinated, offer sanitizing wipes and even provide for contactless checkout.

Planning for Travel

Interest in Santa Cruz County Activities



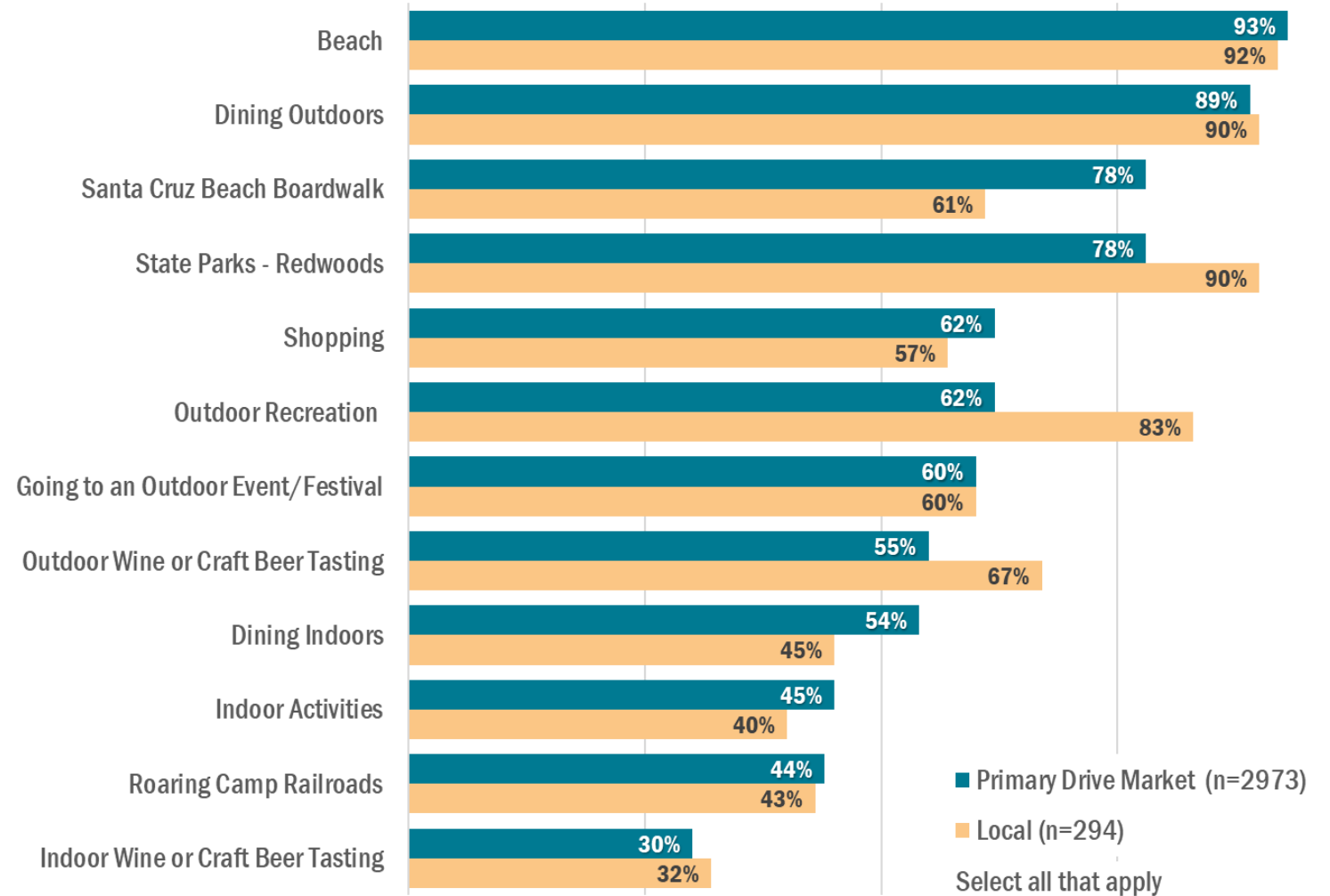
If you were to visit Santa Cruz County in 2021, what types of activities would interest you? (Select all that apply)

- Nine in ten non-locals are into the beach and dining outdoors, while about eight in ten wanted to visit the Santa Cruz Beach Boardwalk or the local Redwoods.
- Six in ten would like to be active outdoors, go to an outdoor event or shop.
- Over half wanted to do an outdoor wine or beer tasting or dine indoors.
- Four in ten or less would seek out indoor activities or Roaring Camp.

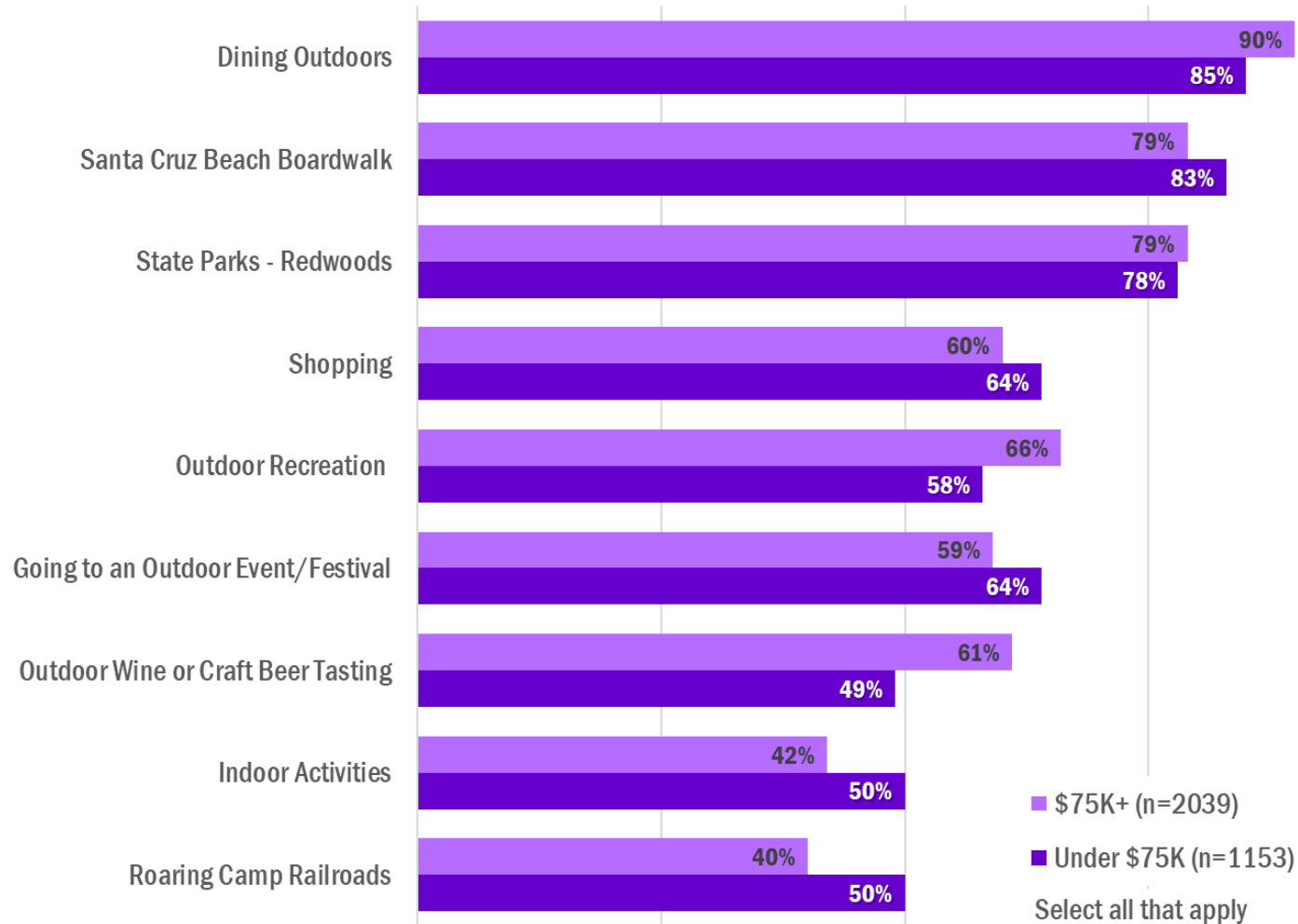
Interest in Santa Cruz County Activities

If you were to visit Santa Cruz County in 2021, what types of activities would interest you? (Select all that apply)

- As seen here, PDM travelers are much more likely than locals to seek out the Boardwalk, shopping, indoor dining and other indoor activities.
- For their part, locals are significantly more likely to visit nearby state parks, pursue outdoor recreation, and participate in outdoor beer and/or wine tasting.
- Locals and PDM visitors were equally likely to visit the beach or eat outdoors.



Interest in Santa Cruz County Activities



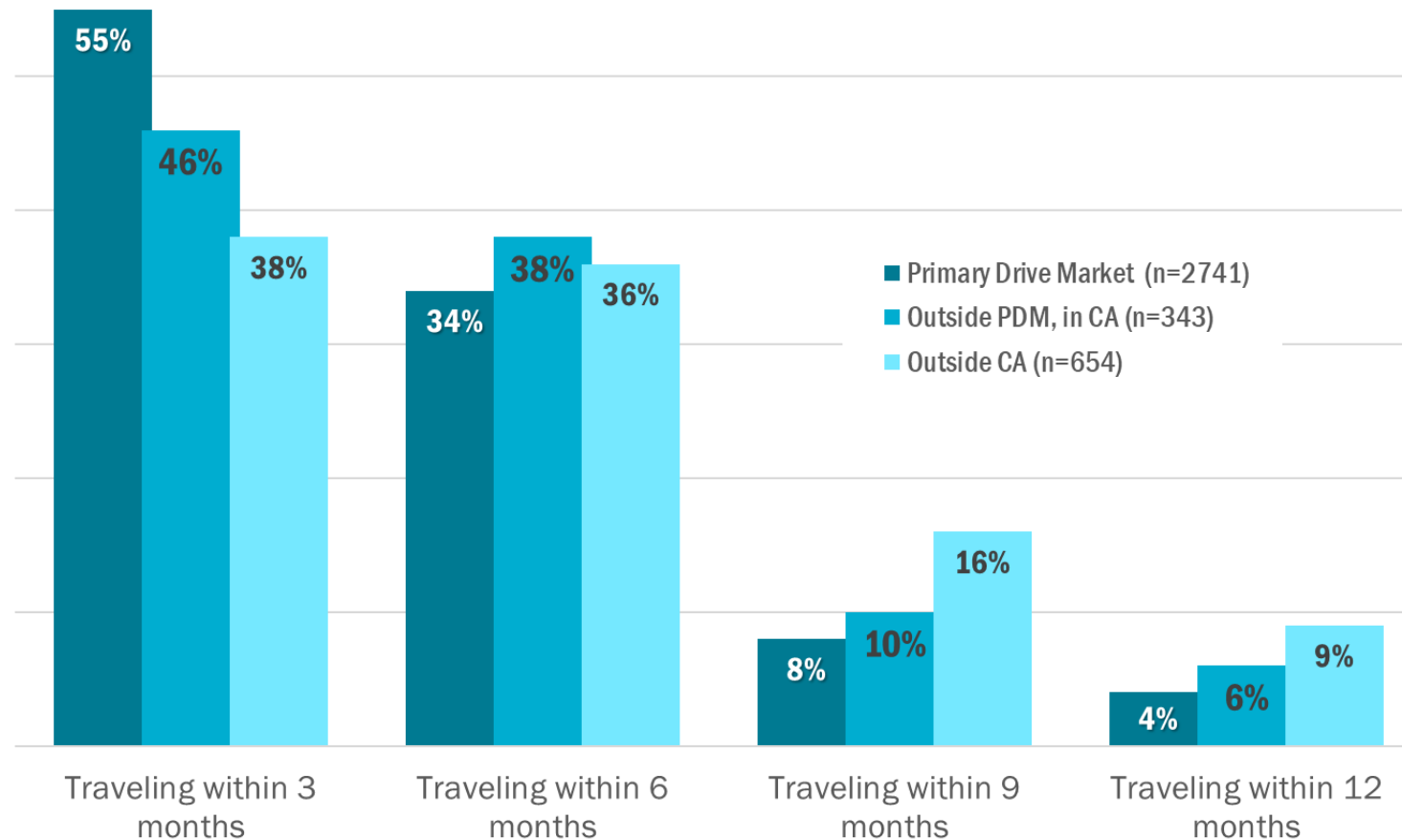
If you were to visit Santa Cruz County in 2021, what types of activities would interest you? (Select all that apply)

- Households that earn more are more interested in outdoor dining, outdoor recreation and outdoor tastings.
- Households with under \$75K annual HHI were more interested in the Santa Cruz Beach Boardwalk, outdoor events, shopping, indoor dining and activities and Roaring Camp Railroads.

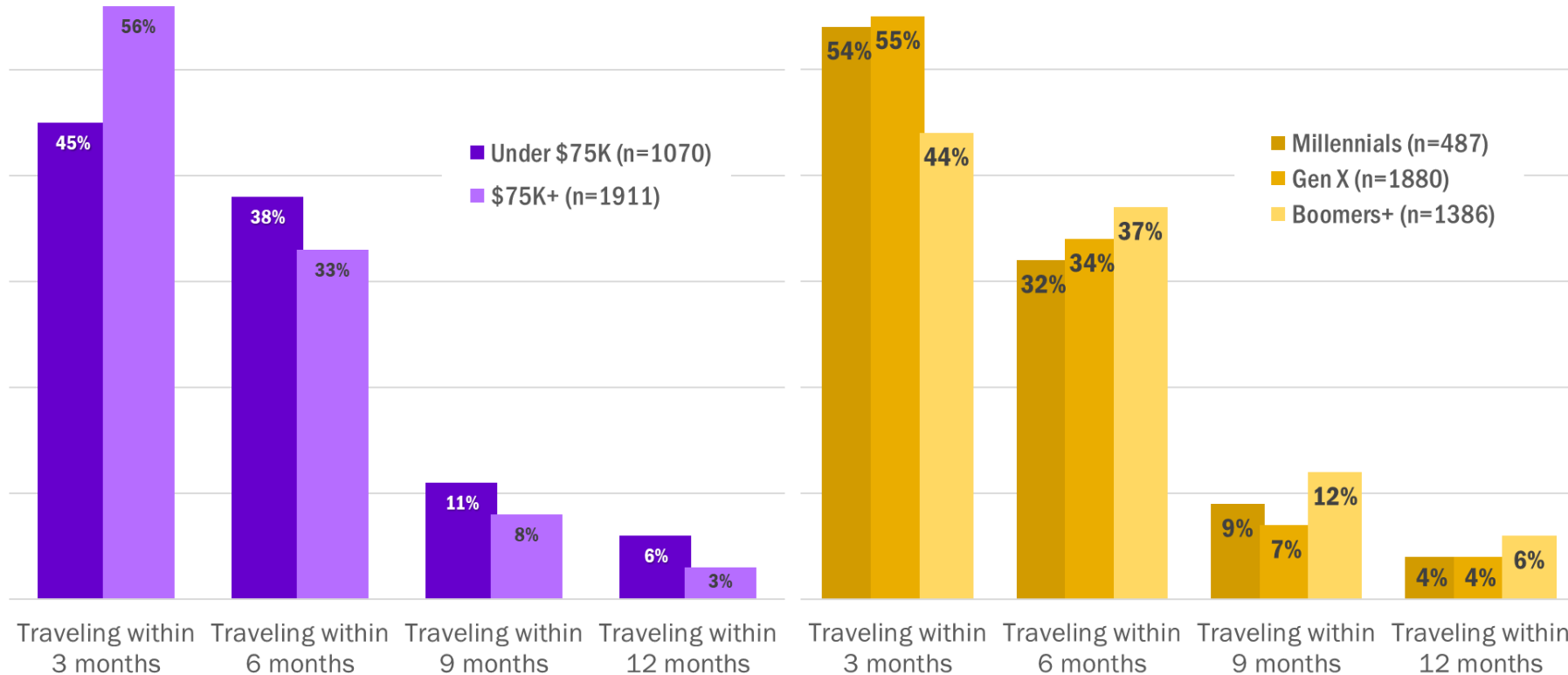
2021 Overnight Travel Outlook

What timeframe best describes your expected overnight travel in 2021? (Select one only)

Nearly nine in ten Santa Cruz County PDM respondents describe their overnight travel plans as happening soon.



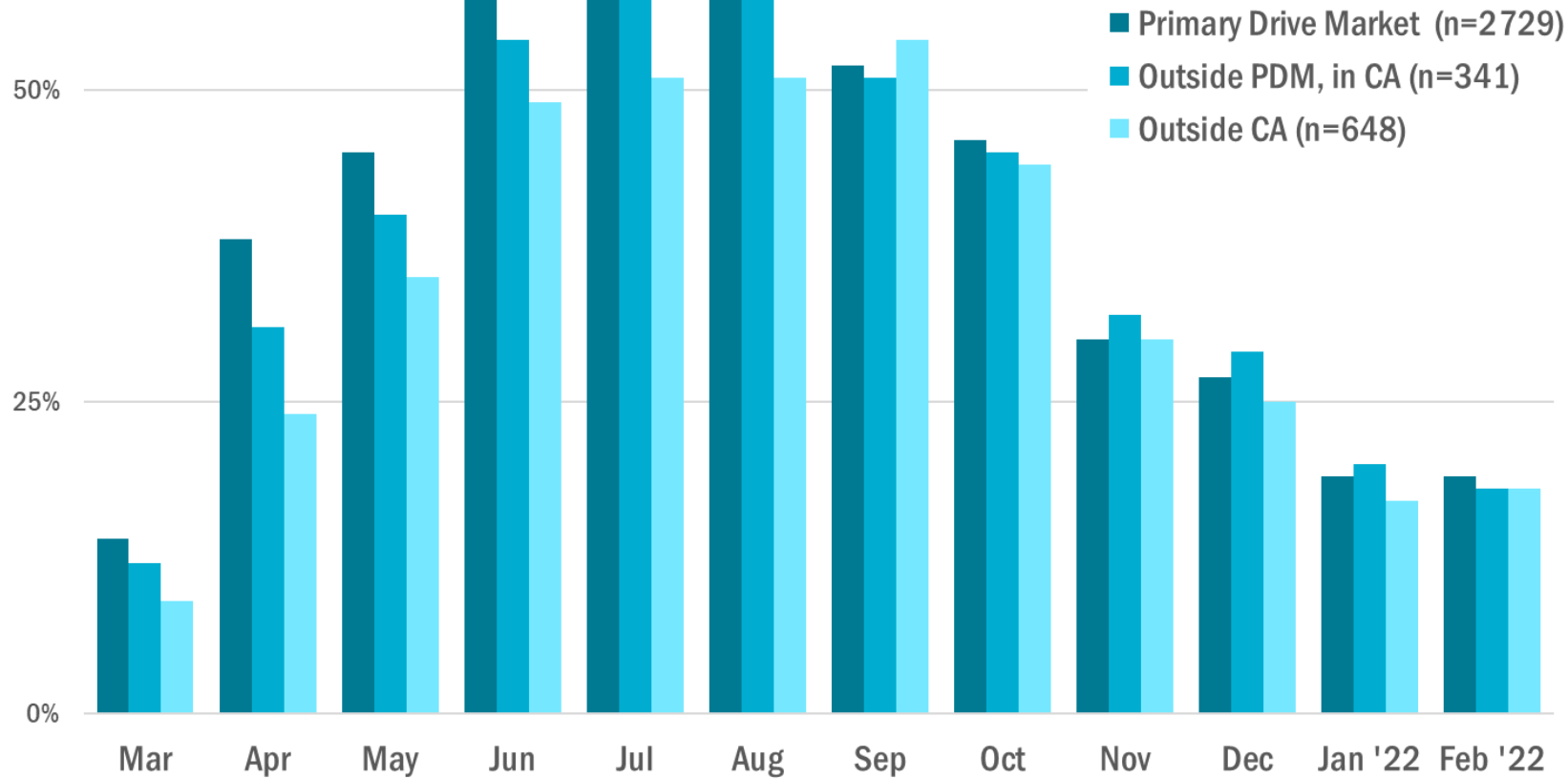
2021 Overnight Travel Outlook



*What timeframe best describes your expected overnight travel in 2021?
(Select one only)*

- Wealthier travelers plan to travel sooner than those with less income.
- Younger Millennial and GenX travelers want to hit the road sooner than Boomers do.
- Women feel like traveling sooner, while men are a bit more willing to wait.

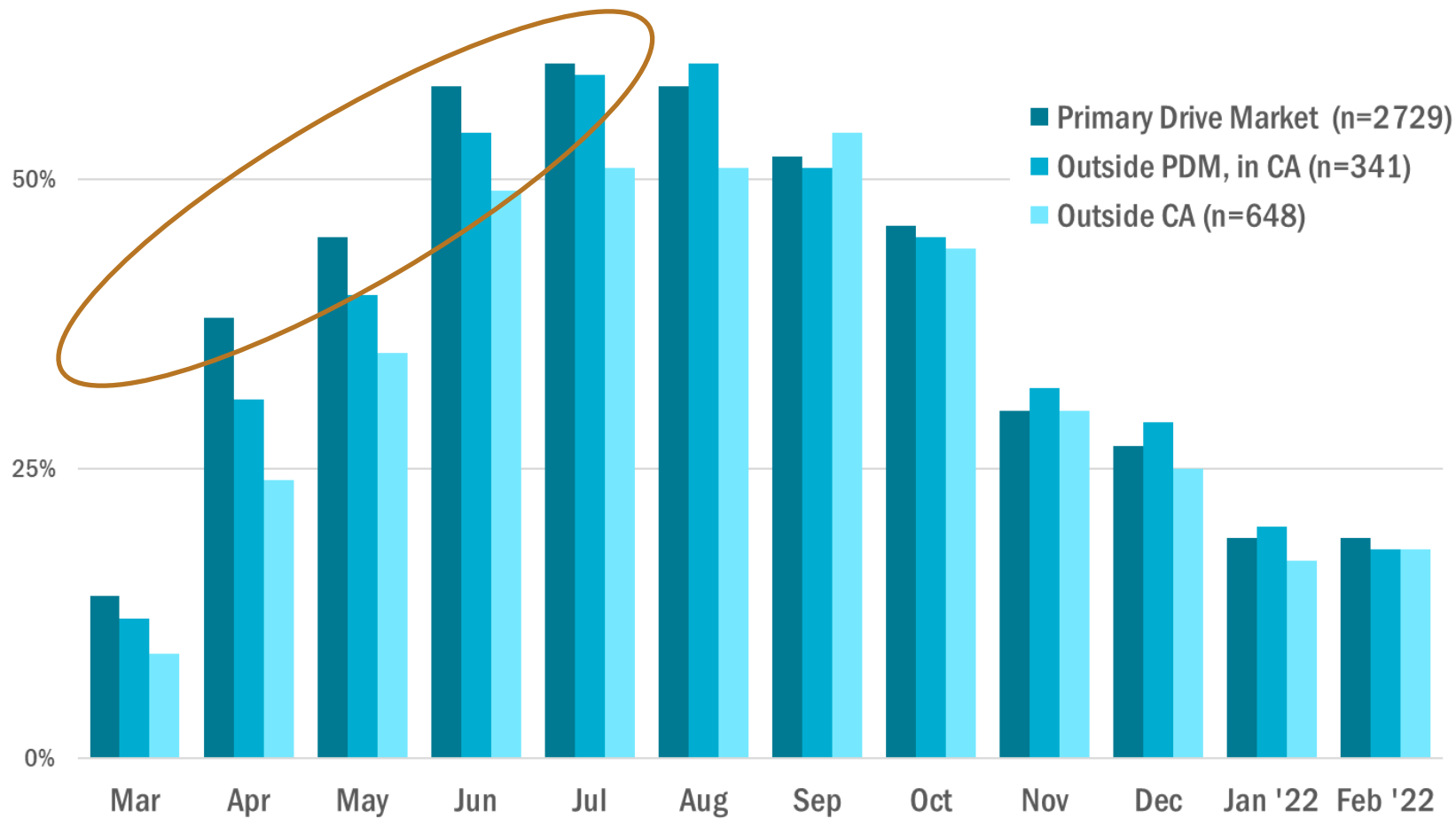
Likely Months for Travel in Coming Year



In which upcoming month(s) are you considering overnight travel? (Select all that apply)

- Travelers in the PDM area surrounding Santa Cruz County are willing to travel significantly sooner than those in other parts of California and those elsewhere in the country.

Likely Months for Travel in Coming Year



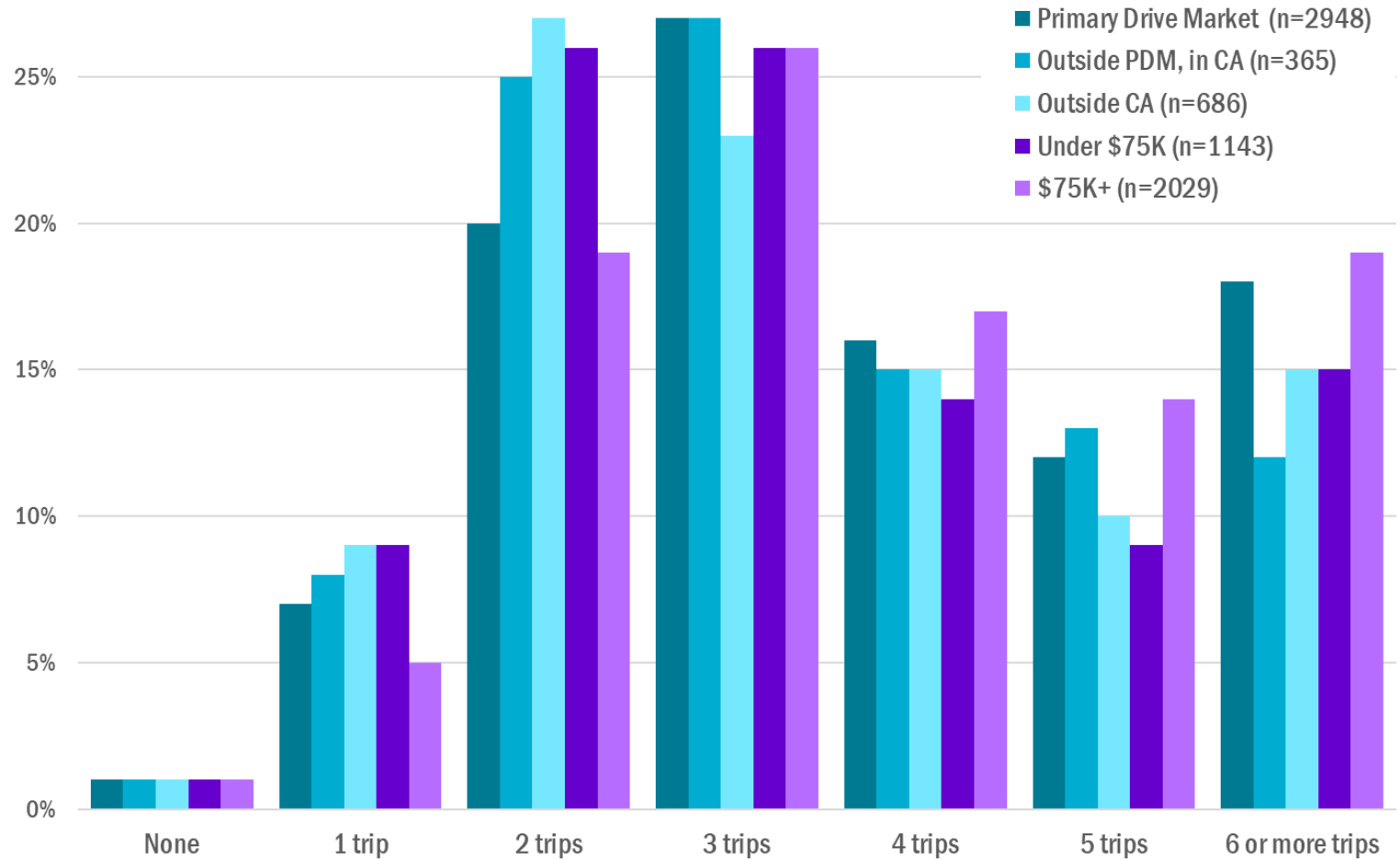
In which upcoming month(s) are you considering overnight travel? (Select all that apply)

- Travelers in the PDM area surrounding Santa Cruz County are willing to travel significantly sooner than those in other parts of California and those elsewhere in the country.

Overnight Trips Planned for 2021

How many trips do you plan to take in 2021 with at least one overnight stay? (Select one)

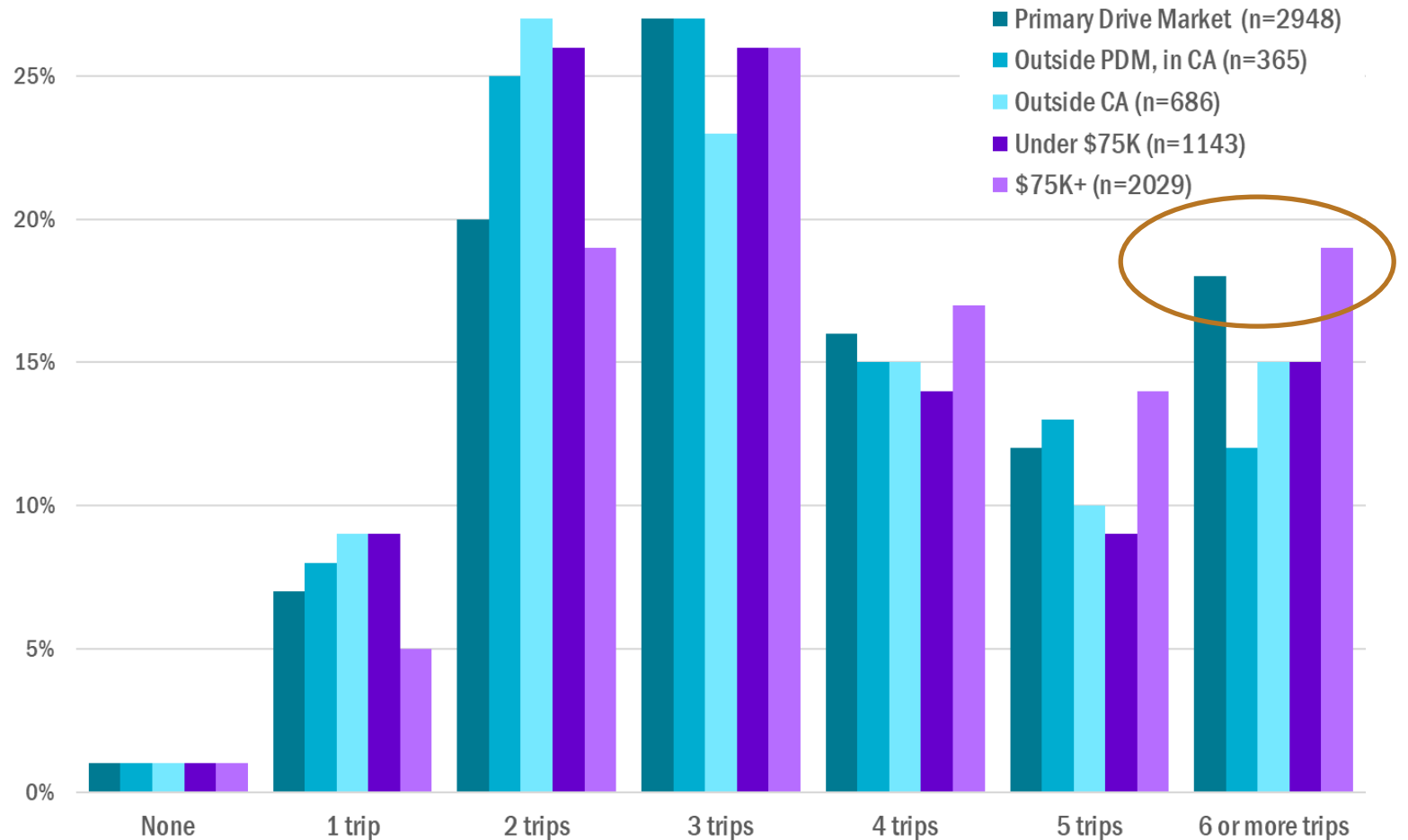
- Few travelers plan to take just one trip or less.
- A majority plan to take three to five trips.



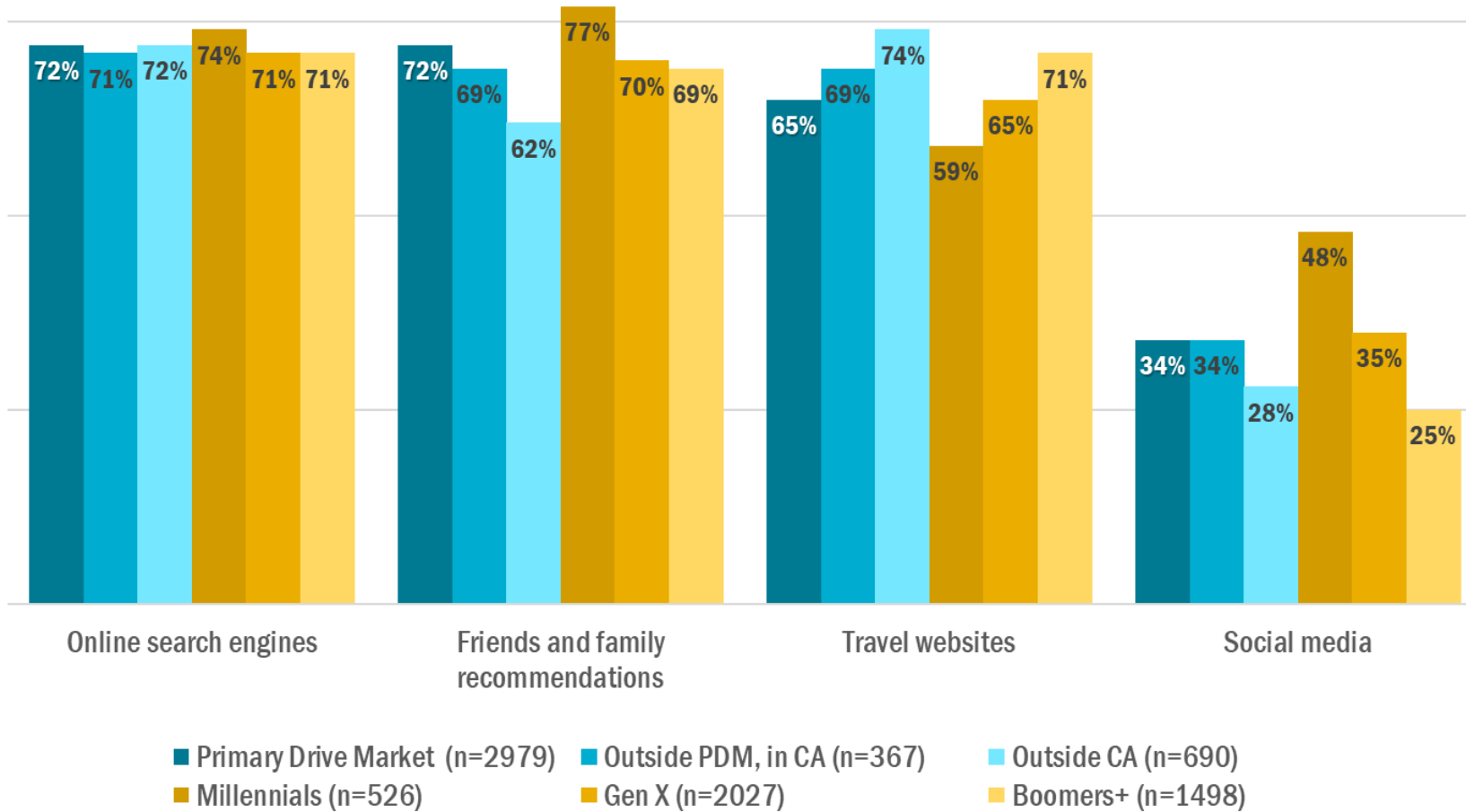
Overnight Trips Planned for 2021

How many trips do you plan to take in 2021 with at least one overnight stay? (Select one)

- Few travelers plan to take just one trip or less.
- A majority plan to take three to five trips.
- Those in the Santa Cruz County drive market are much more likely to plan six or more trips.
- Households earning over \$75K plan to take significantly more trips than traveler households earning \$75K or less.



Doing Travel Research



What resources could you see yourself using to research travel for your next trip? (Select all that apply).

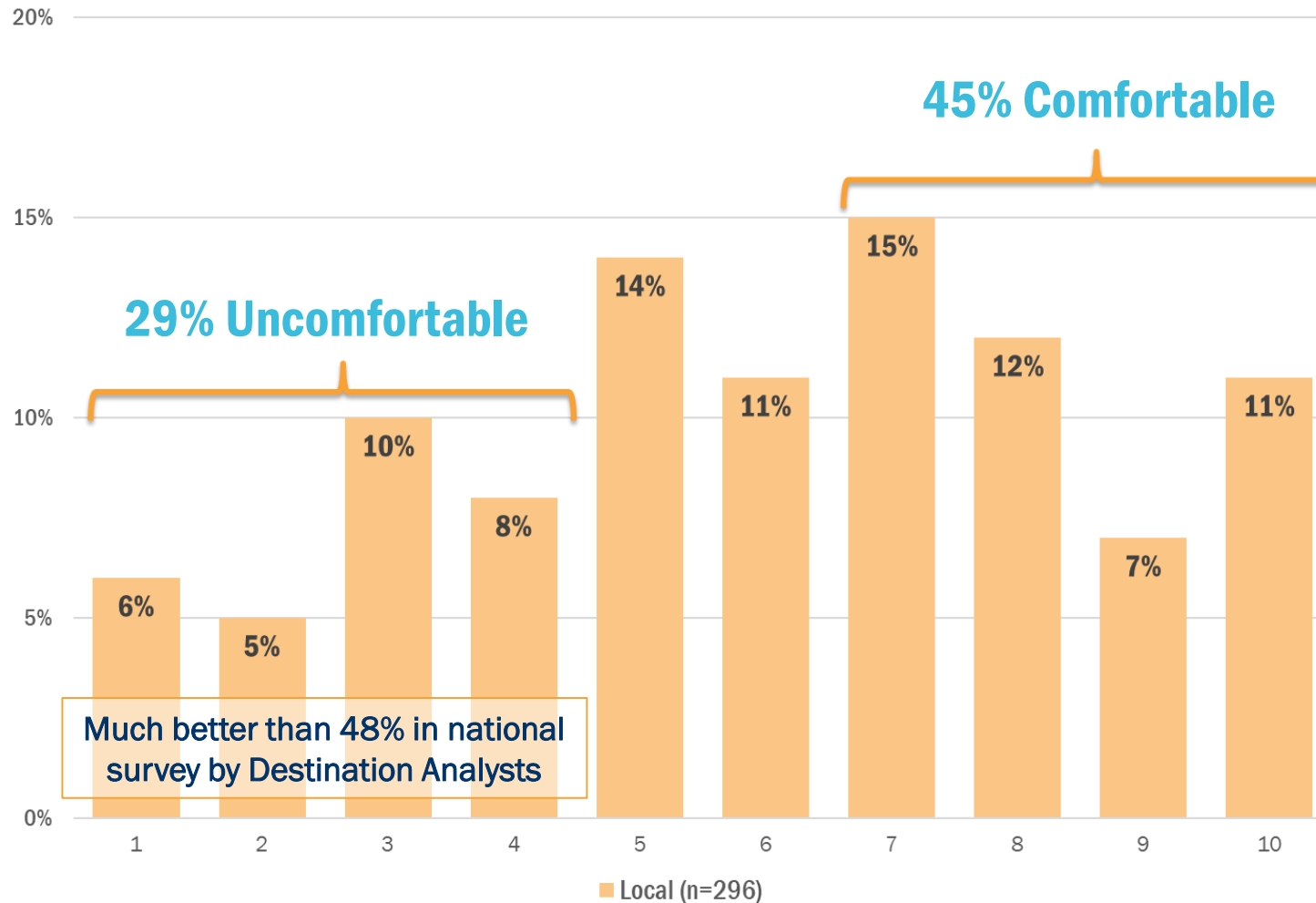
- Seven in ten travelers expect to use search engines, word of mouth recommendations and travel websites to research their options. Half this many expect to use social media.
- Except for search engines, expected utilization varied most widely by generation and location.

Takeaways for Travel Planning

- Travelers in the PDM area surrounding Santa Cruz County are **willing to travel significantly sooner than others** elsewhere in California and the country.
 - Start inviting them to visit Santa Cruz County now. Offer rewards for spontaneity.
- Santa Cruz County **PDM travelers will be trekking many times this year.**
 - Repeated invitations are essential to ensure that Santa Cruz County destinations receive a good share of these trips.
- **Leverage your media channel usage and messaging.**
 - Get to Millennials on social media, get them talking, and reward them for planning early.
 - Reach 40+ year-olds thru search engines and travel sites and reassure them of safety.

Local Attitudes on Visitors and Travel

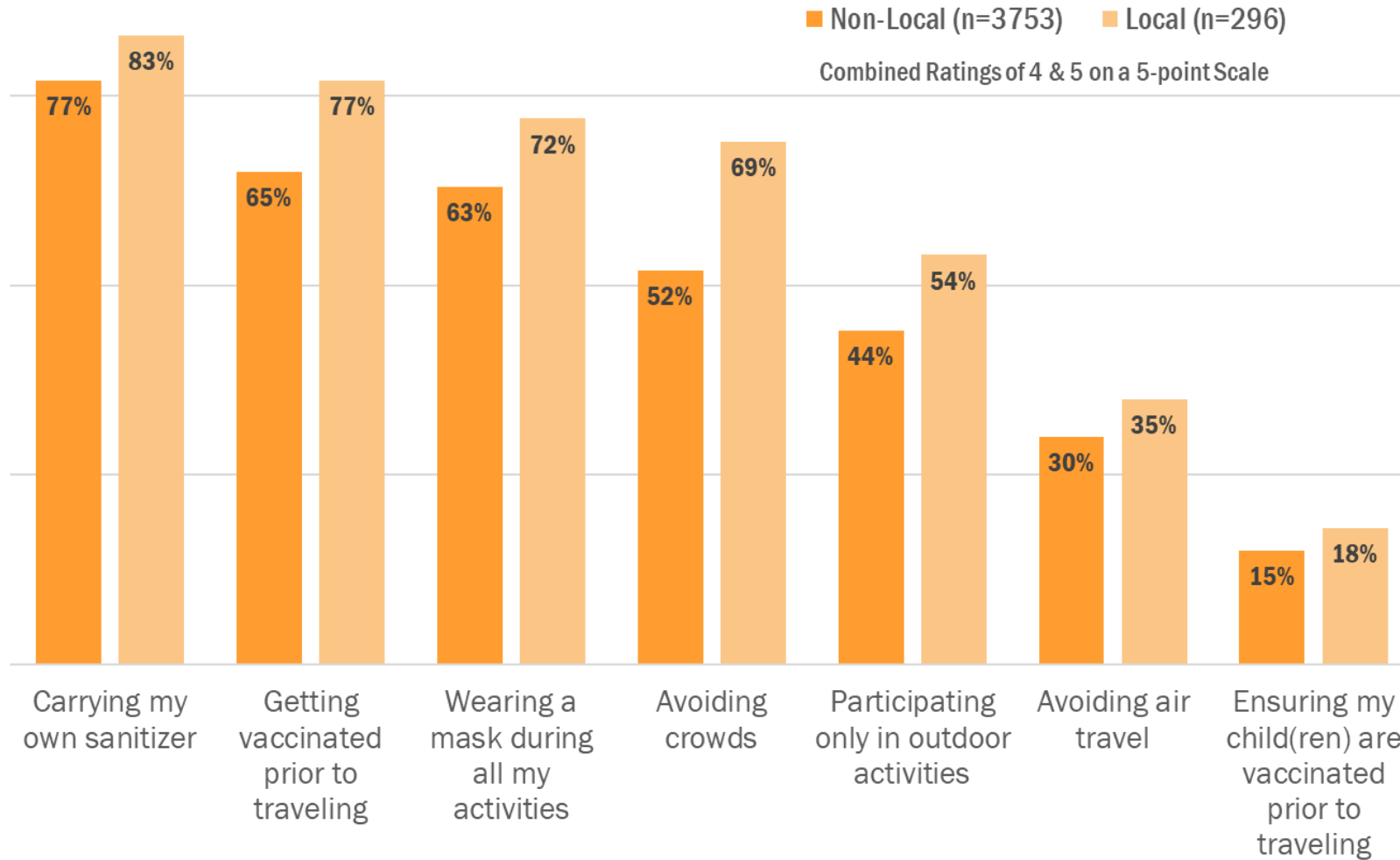
Local Attitudes on Santa Cruz County Tourism



Please rate your feelings about the idea of out-of-towners visiting Santa Cruz County in 2021? Scale of 1-10 where 1 is "Extremely Uncomfortable" and 10 is "Extremely Comfortable"

- Most residents of Santa Cruz County who answered the survey are either comfortable or neutral about the notion of visitors to Santa Cruz County.

Local and Visitor Attitudes on Safety



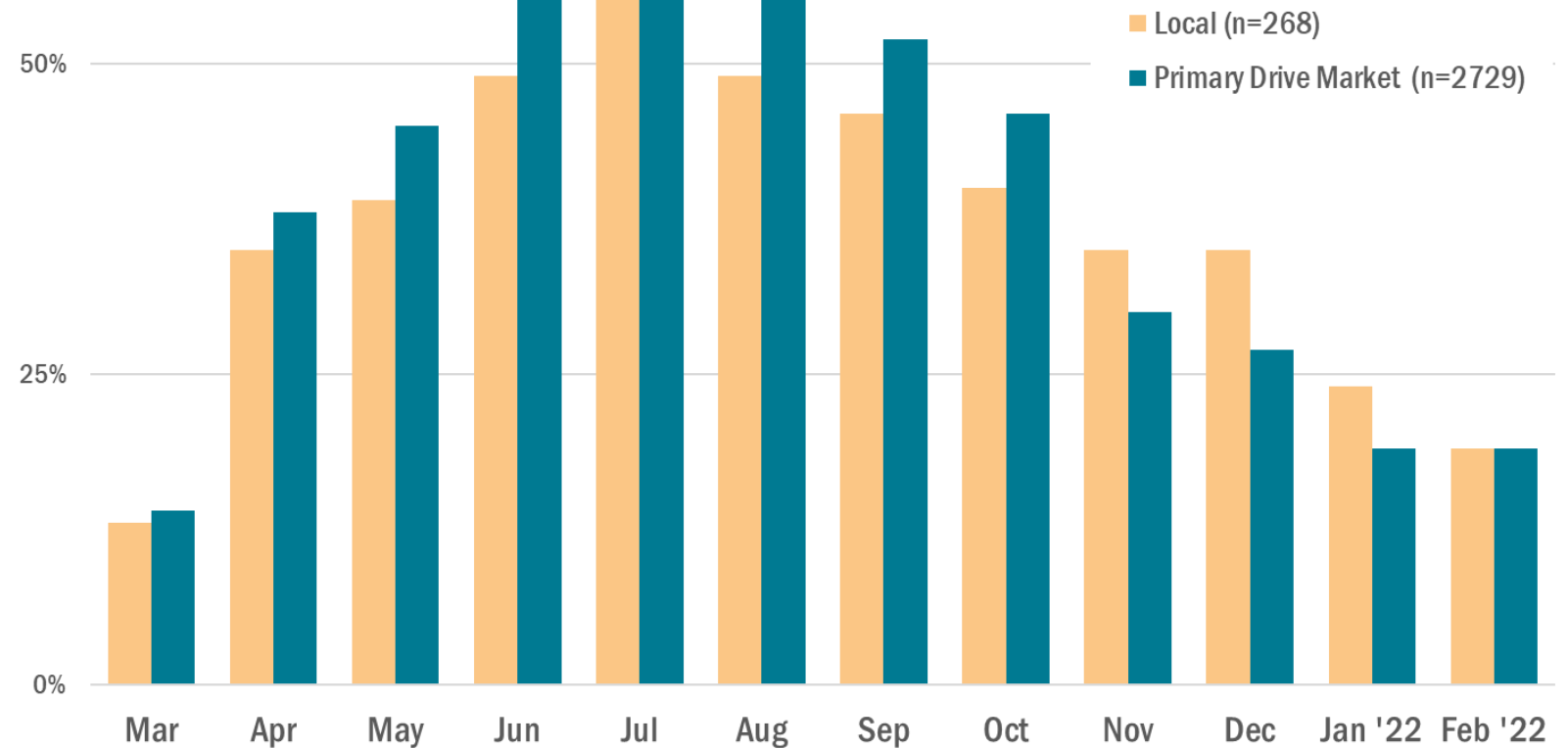
Please rate the following actions for assuring your safety during upcoming overnight travels. Scale of 1-5 scale of 1-5 where 1 is "Completely Unnecessary" and 5 is "Mandatory"

- Except for vaccinating children, locals rated every action they might take during travel as 'necessary' or 'mandatory' significantly more than non-local respondents.

Local and Visitor Thoughts on Travel Timing

In which upcoming month(s) are you considering overnight travel? (Select all that apply)

- Fewer local travelers seem to be planning trips elsewhere during the summer months, compared to PDM visitors to Santa Cruz County.

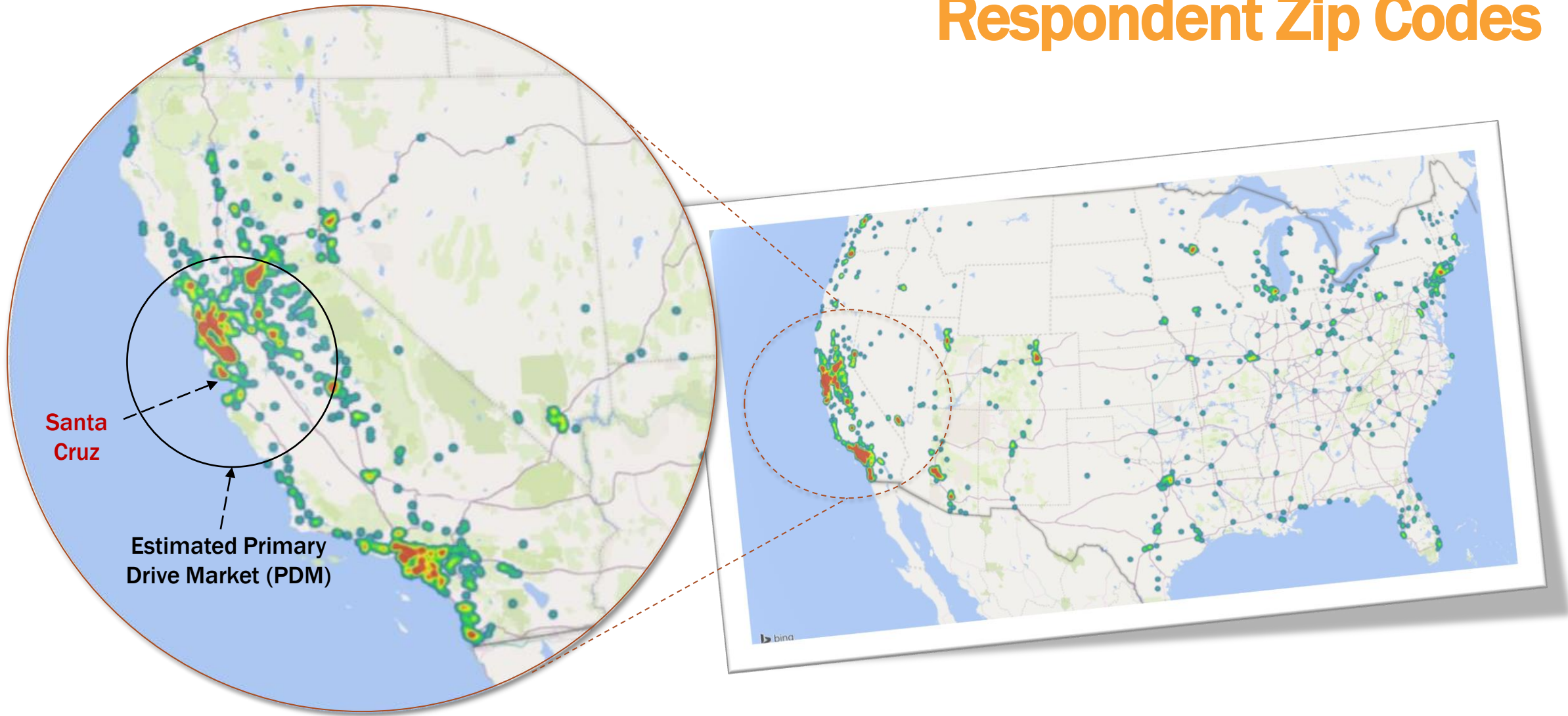


Takeaways Regarding Local Attitudes

- Residents are most likely to welcome visitors back to Santa Cruz County.
- Residents seem likely to remain in town while tourists come to visit.
- Locals express a higher sensitivity regarding personal COVID-19 safety measures while traveling than outsiders did.
 - Businesses are encouraged to reinforce expectations for visitor safety and hygiene by visibly posting recommended guidelines.
 - Municipalities should redouble their efforts to maintain public health and safety, e.g., increasing street sweeping, trash pick-up schedules, etc.

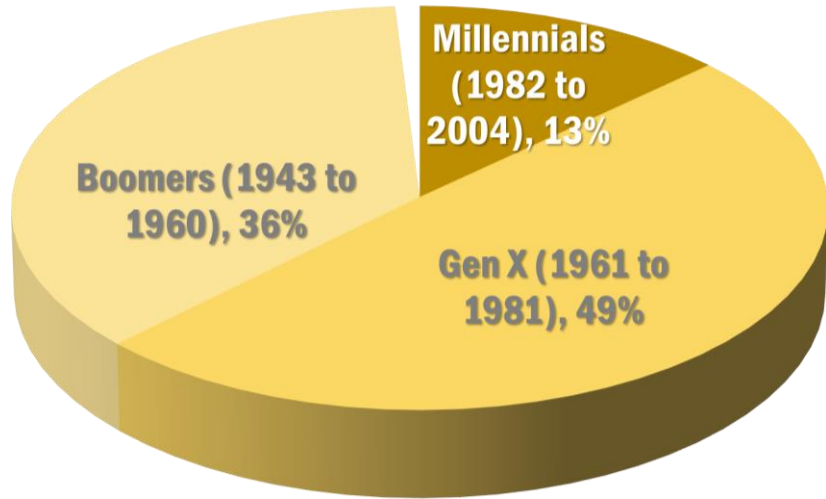
Demographics

Respondent Zip Codes

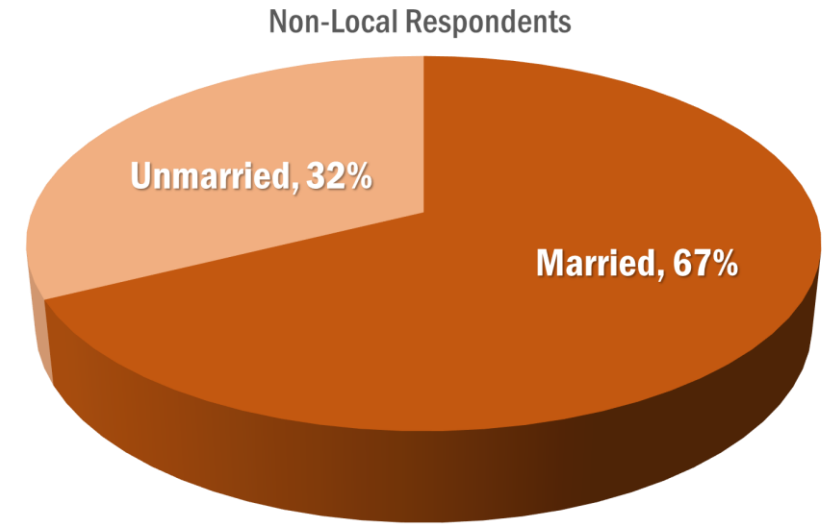
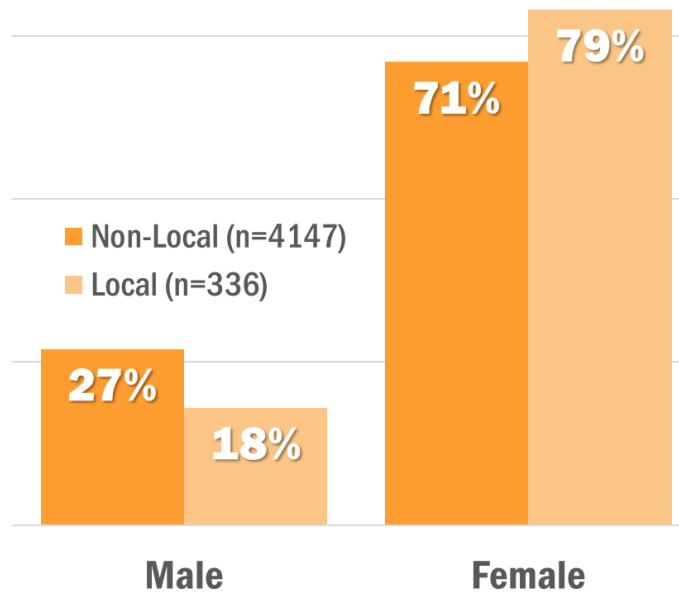


Are you a U.S. resident? ~ In what country/region do you live? ~ What is your home zip code?

Age ~ Gender ~ Relationships

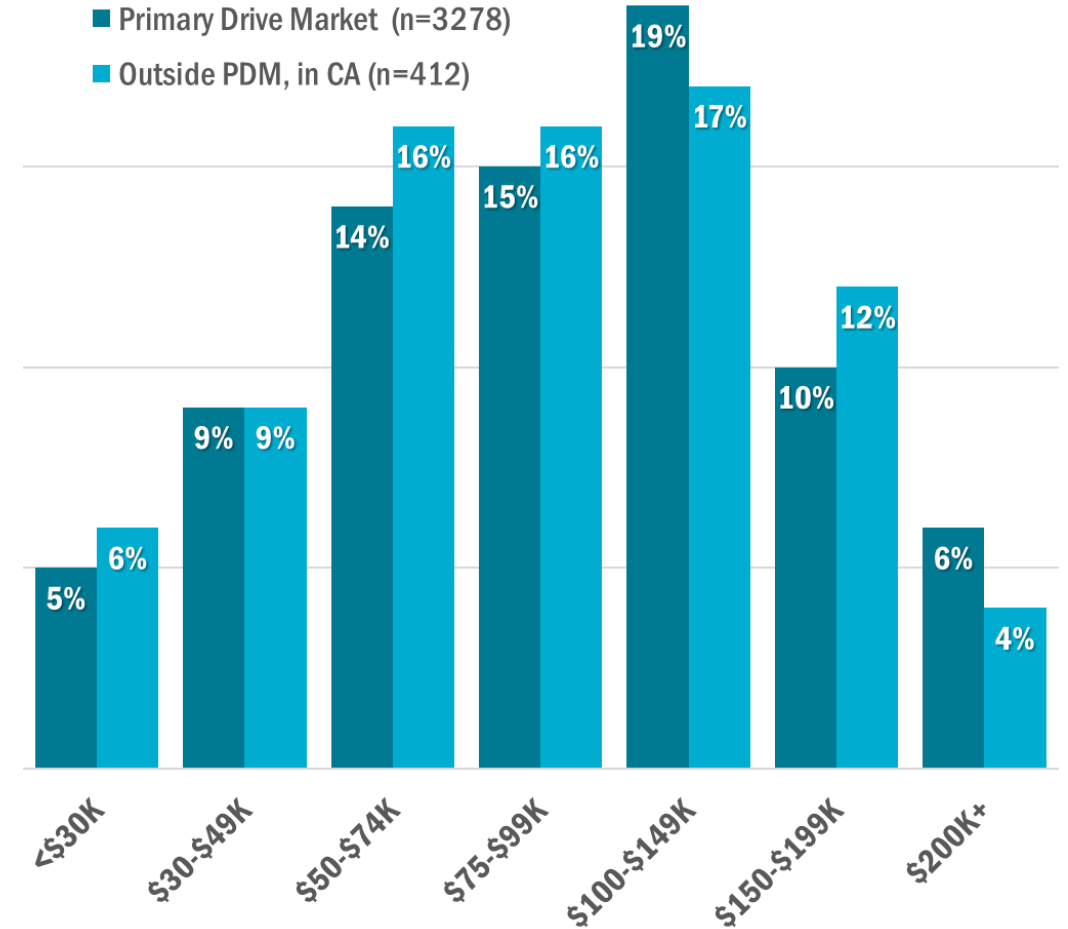
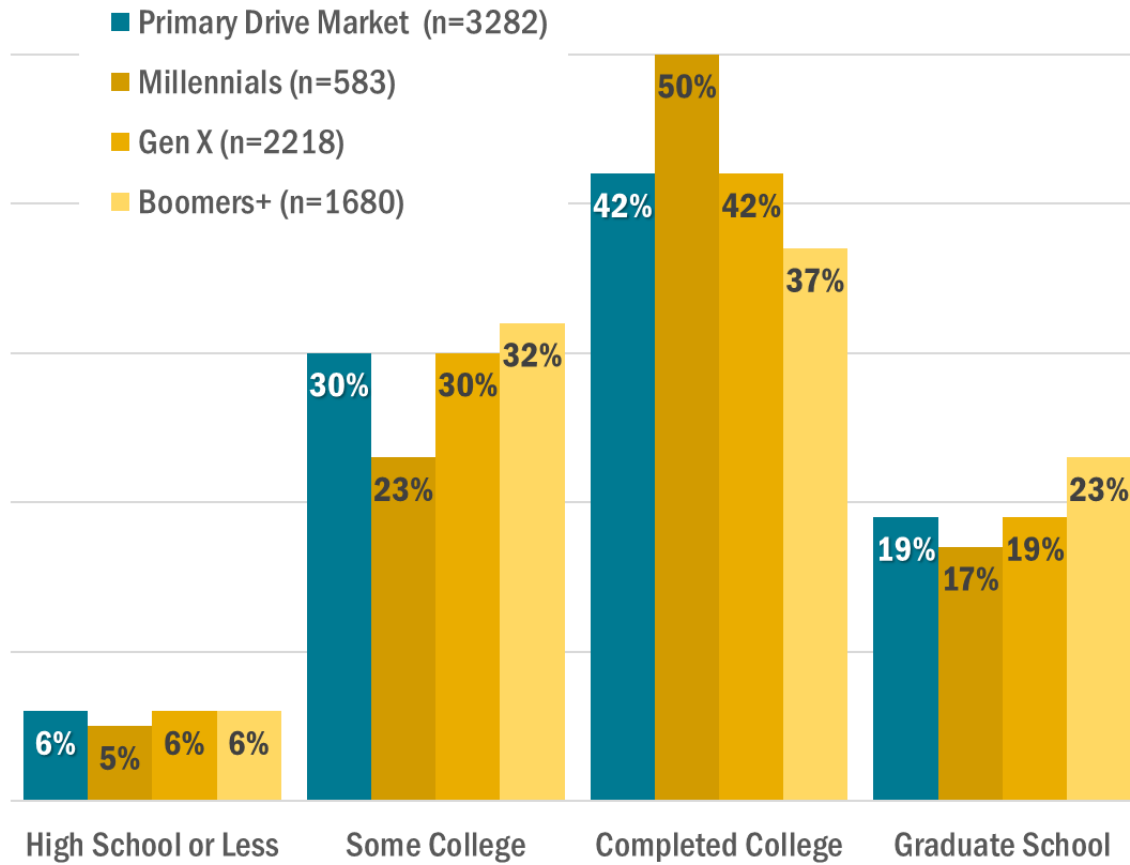


Self-Identified Gender



What is your age? ~ What is your gender? ~ What is your relationship status?

Education ~ Income



What is the highest level of education you've completed? ~ Which category best describes your annual household income?

Questions and Answers about the Study

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