
San Luis Obispo County

2008 Survey of Visitor Perceptions and Attitudes

Prepared By:



Commissioned By:



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Section I: Report Overview

I. Introduction

The San Luis Obispo (SLO) County Visitors & Conference Bureau contracted with Strategic Marketing Group (SMG) to conduct market research in the form of a survey to evaluate San Luis Obispo (SLO) County visitor and non-visitor perceptions, decision making, and satisfaction.

The goals of the 2008 Survey included:

1. Develop visitor profile data, including:
 - Demographics
 - Destinations visited
2. Analyze visitor and non-visitor perceptions of SLO County, including:
 - Reasons for visiting and not visiting SLO County
 - Comparison with Monterey and Santa Barbara Counties
 - Likelihood of visiting in the future
3. Evaluate visitor satisfaction

II. Survey Methodology

In July 2008, SMG conducted an online survey.

- Survey invitations were sent to potential visitors who had inquired about visitor information for San Luis Obispo County within the past 24 months.
- The sample included 1,404 respondents. At a 95% confidence level, a margin of error of +/- 5% applies.
- All respondents completed visitor profile questions and questions about their perceptions of San Luis Obispo County

III. Master Tab

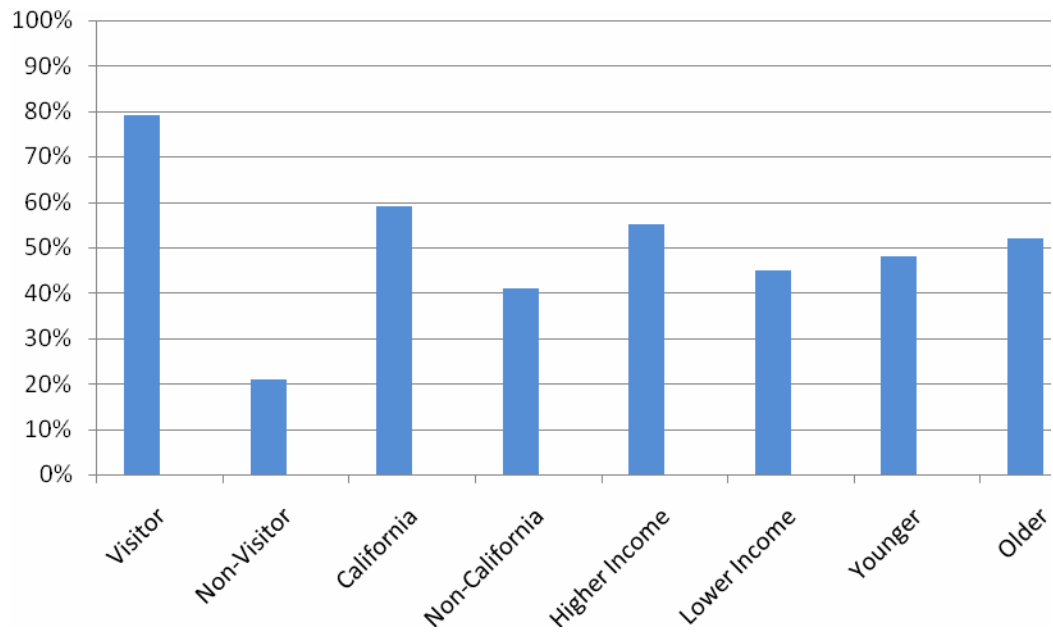
This report analyzes each survey question by the entire sample of respondents, as well as by “master tab” categories. The master tab provides a method for understanding how various groups within the entire sample conform and differ from one another.

For this report, the master tab consists of:

- **Visitor/Non Visitor:** Distinguishes between respondents who had visited SLO County within the past 24 months (79% of the overall sample) and those who had not (21% of the sample).
- **California/Non-California Respondents:** Distinguishes between visitors who live in California (59% of the sample) and those who live elsewhere (41%).
- **Higher Income/Lower Income Respondents:** Distinguishes between respondents with household incomes of more or less than \$100,000 a year (55% and 45% of the sample, respectively).



- **Age:** Distinguishes between respondents who are younger or older than 50 (48% and 52% of the sample, respectively).



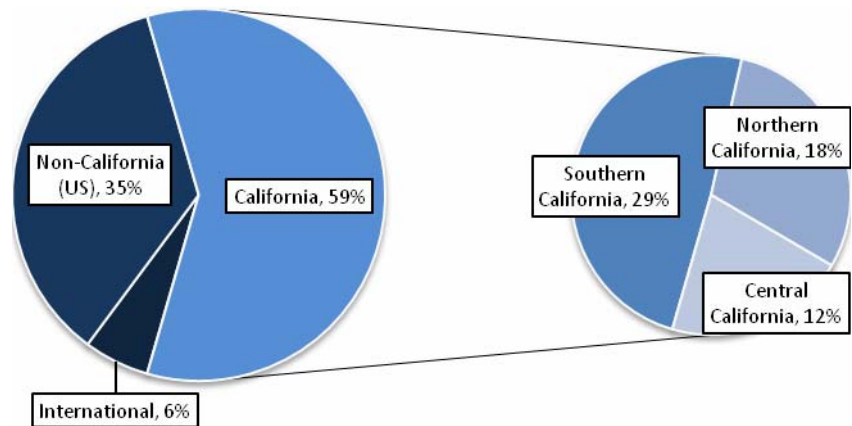
Section II: Demographics

In order to gather information about the sample, the survey asked respondents to specify where they live, their age and their income.

I. Geographic Origin

- Over half of respondents (59%) lived in California:
 - 18% lived in Northern California
 - 29% lived in Southern California
 - 12% lived in Central California
- An additional 6% of respondents lived outside of the United States.
- Other U.S. states accounted for only insignificant percentages of the sample, with the highest percentages of non-California respondents living in Arizona (4%), and Texas, Colorado and Florida (2% each).

Figure 2
Geographic Origin
Base: All Respondents



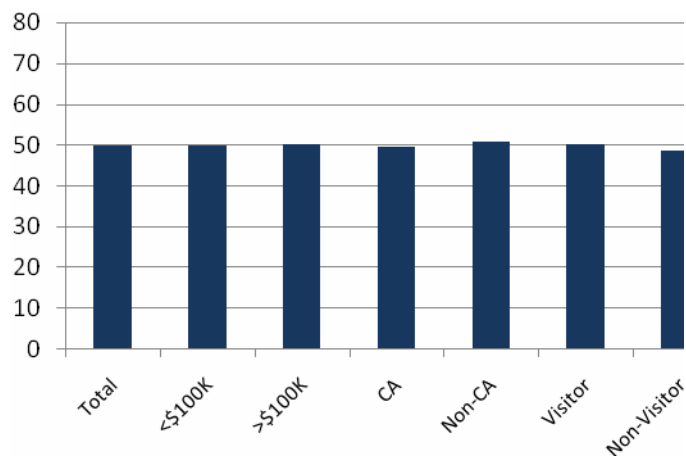
II. Age

- Among all respondents, the average age was 50.
- Age varied only slightly among master tab groups. See Figure 2.

III. Income

- The average annual household income among all respondents was \$117,553.
- Overall, 55% of respondents earned more than \$100,000 and 45% earned less than \$100,000 per year.

Figure 3
Age
Base: All Respondents



- Income varied only slightly by master tab group (see Figure 4).
 - The largest difference existed between visitors (\$120,567) and non-visitors (\$106,126).

Section III: Destinations Visited

The survey asked all respondents if they had visited SLO County, Santa Barbara County, Monterey County, and other coastal California destinations within the past 24 months.

I. SLO County Visitors

- Most respondents (79%) had visited SLO County within the past 24 months.
- The percentage of visitors was high among all master tab groups. However:
 - Californians were more likely to have visited (85%) than non-California respondents (70%)
 - Higher-income respondents were more likely to have visited (83%) than lower-income respondents (76%).

II. Monterey County Visitors

- Overall, 46% of respondents had visited Monterey County in the past 24 months.
- Percentages varied significantly by master tab groups:
 - SLO County visitors were much more likely to have visited Monterey County (53%) than non-visitors (18%).
 - Californians were more likely to have visited (51%) than non-Californians (39%).

Figure 4
Annual Household Income
Base: All Respondents

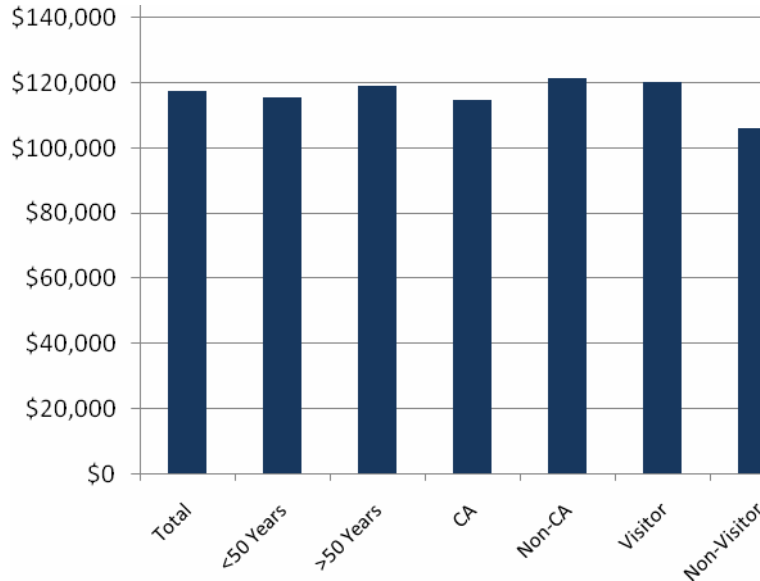
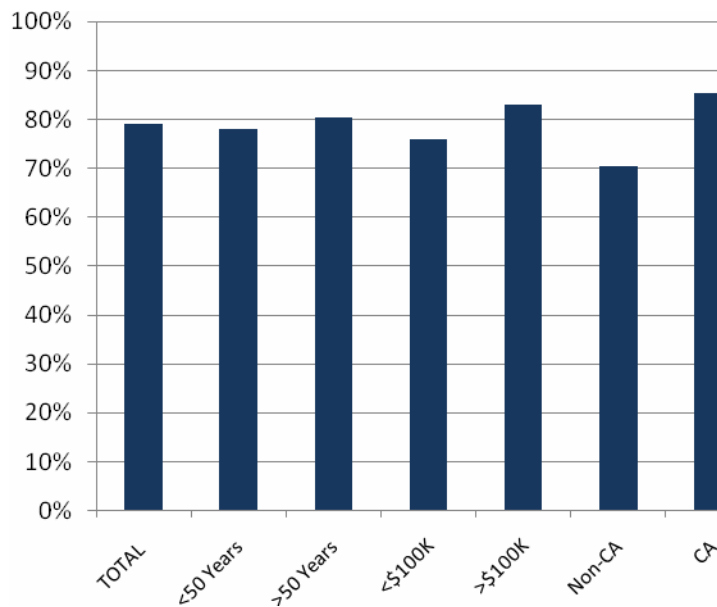


Figure 5
Had Visited SLO County in the Past 24 Months
Base: All Respondents



- Higher-income respondents were more likely to have visited Monterey County (51%) than lower-income respondents (42%).
- Respondents varied little by age; 45% of those under 50 and 47% of those over 50 had visited Monterey County.

III. Santa Barbara County Visitors

- Overall, 43% of respondents had visited Santa Barbara County in the past 24 months. Percentages varied among some master tab groups:
 - 49% of Californians had visited Santa Barbara County, compared with 34% among other respondents.
 - 51% of SLO County visitors had also visited Santa Barbara County, compared with only 13% among those who had not visited SLO County.
 - Percentages varied little by income (45% among higher-income respondents and 41% among lower-income respondents) and by age (43% among both older and younger respondents).

IV. Comparison of Monterey and Santa Barbara Counties with SLO County

Respondents who had visited Monterey or Santa Barbara Counties were asked to compare them with SLO County on several different attributes.

Figure 6
Had Visited Monterey County/Santa Barbara County in the Past 24 Months
Base: All Respondents

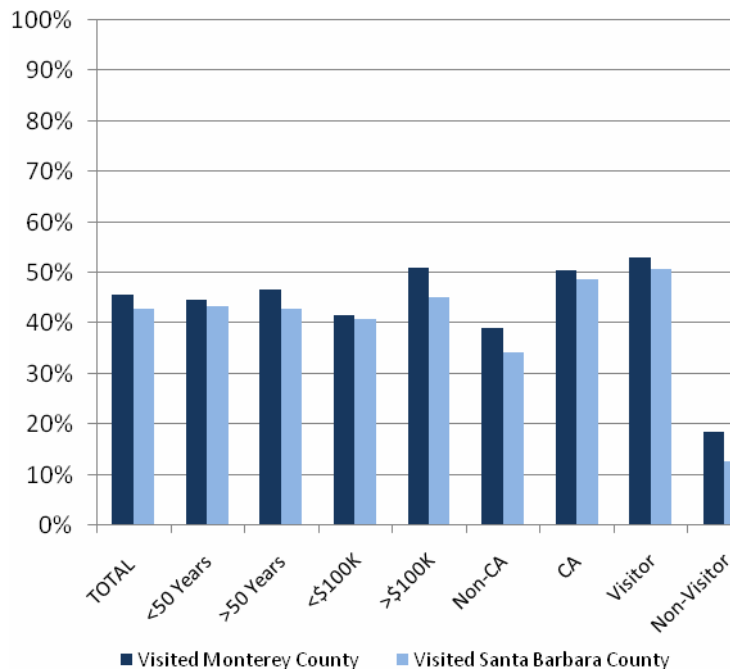
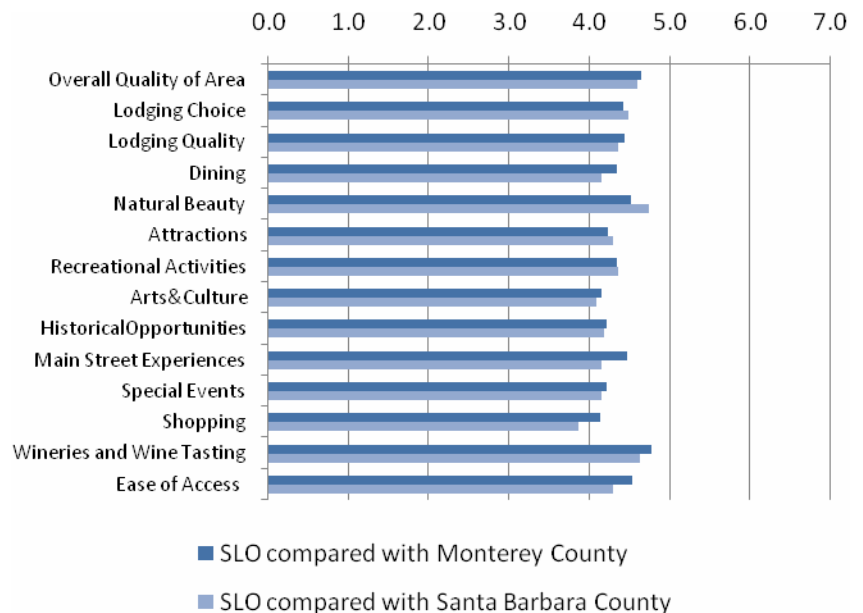


Figure 7
SLO County compared with Monterey County/Santa Barbara County
Base: Respondents who had visited Monterey County/Santa Barbara County



Respondents rated SLO County on a scale of 1 (SLO County is much worse than Monterey/Santa Barbara County) to 5 (SLO County is much better than Monterey/Santa Barbara County), with 4 indicating neutral rating (i.e., both SLO County and Monterey/Santa Barbara County are equal).

- Respondents gave all attributes ratings between 4.1 and 4.8 out of 7, indicating that they felt SLO was slightly better than Monterey County and Santa Barbara County in most attributes (see Figures 8 and 9).
- In general, ratings varied little by master tab groups, with no notable differences by age, income, or geographic origin.
- However, respondents who had visited SLO County gave higher ratings than those who had not (see Figure 8 and 9).

Highest Ratings

- Among the overall sample, SLO County received the highest ratings for wineries and wine tasting; Monterey County visitors gave SLO County a rating of 4.8, and Santa Barbara County visitors gave SLO a rating of 4.6.
- SLO also received high ratings for overall quality of the area (4.6 among both Monterey and Santa Barbara County visitors) and natural beauty (4.5 among Monterey County visitors and 4.7 among Santa Barbara visitors).

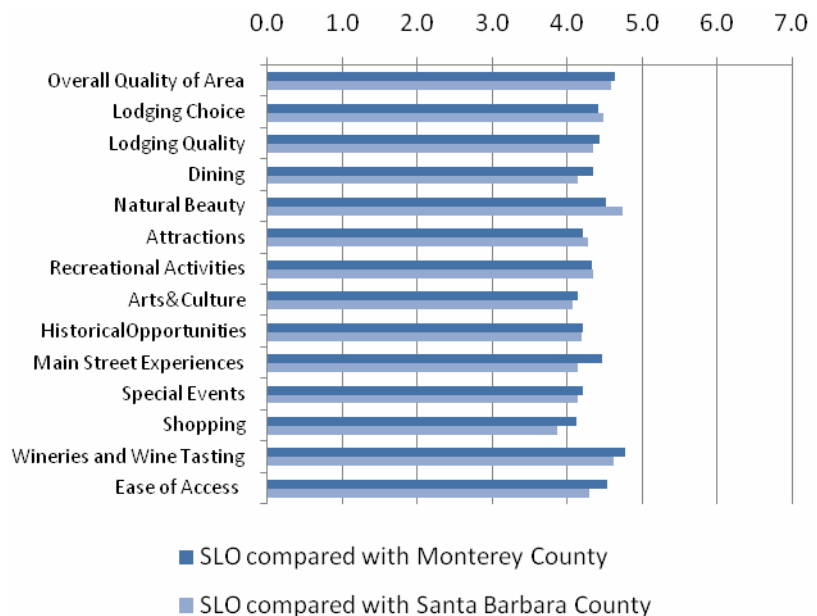
Lowest Ratings

- SLO County received the lowest ratings for shopping among both Monterey County (4.1) and Santa Barbara visitors (3.9).

Figure 8
SLO County compared with Monterey County:
SLO County Visitors and Non-Visitors
Base: Respondents who had visited Monterey County



Figure 9
SLO County compared with Santa Barbara County:
SLO County Visitors and Non-Visitors
Base: Respondents who had visited Santa Barbara County



- Santa Barbara County visitors also gave SLO County slightly lower ratings for special events, main street experiences, arts and culture, and dining (4.1 each).
 - However, even these lower ratings indicate that most respondents felt that SLO County was about the same as or slightly better than Santa Barbara in these areas.

V. Other California Coastal Destinations Visited

The survey asked all respondents to select other California coastal destinations that they had visited within the past 24 months, including Carlsbad, Huntington Beach, Marin County, Mendocino County, Newport Beach, Point Reyes area, San Diego area, Santa Cruz, Santa Monica, Venice Beach, and Ventura. See Figure 10.

Figure 10
Other California Coastal Destinations Visited in the Past 24 Months
Base: All Respondents

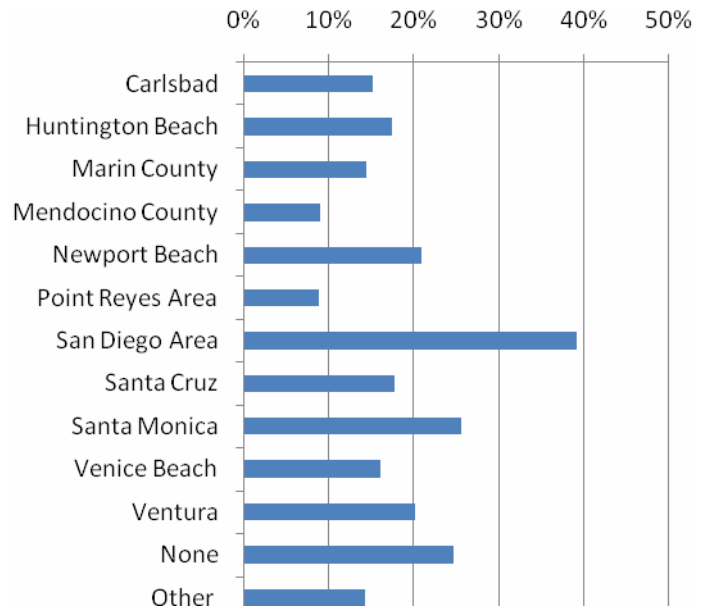
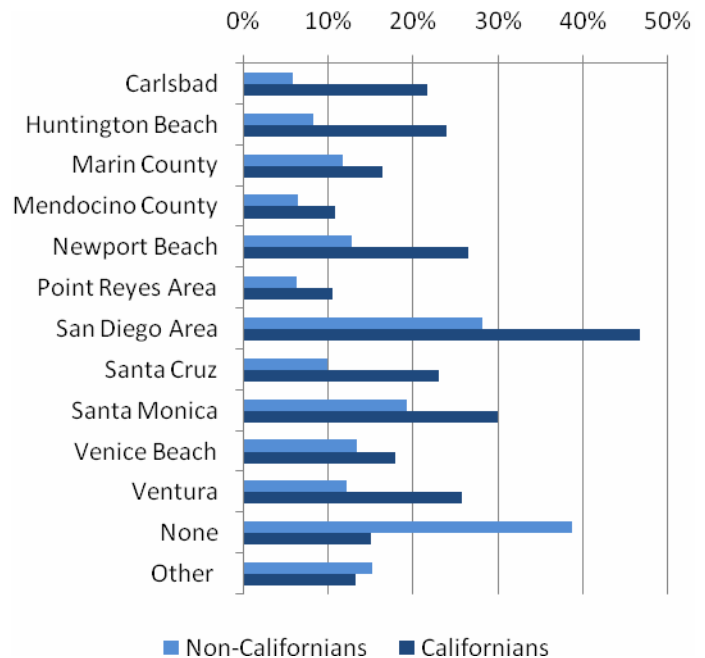


Figure 11
Other California Coastal Destinations Visited in the Past 24 Months
Californians and non-Californians
Base: All Respondents



- Among the entire sample, 75% of respondents had visited another California coastal destination in the past 24 months.
- San Diego was by far the most popular destination; 39% of all respondents had visited in the past 24 months.
- Other popular destinations included Santa Monica (26%) and Newport Beach (21%).

Destinations by Master Tab Group

- Not surprisingly, Californians and SLO County visitors were much more likely to have visited other California coastal destinations. See Figures X and X.

- 85% and 79%, respectively, had visited another California coastal destination, compared with 61% among non-Californians and 60% among non-SLO visitors.
- Additionally, Californians and SLO visitors were much more likely to visit each California coastal destination than non-Californians and non-SLO visitors.
- By income, 79% of higher-income respondents had visited other California coastal destinations, compared with 72% among lower-income respondents.
- Only a slightly higher percentage of younger respondents had visited California coastal destinations (77%, compared with 73% among older respondents).

Figure 12
Other California Coastal Destinations Visited in the Past 24 Months
SLO County Visitors and Non-Visitors
Base: All Respondents

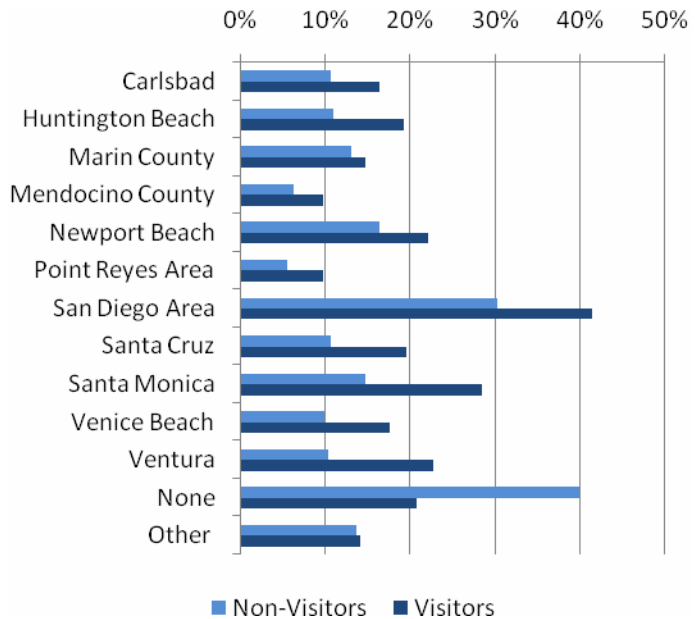
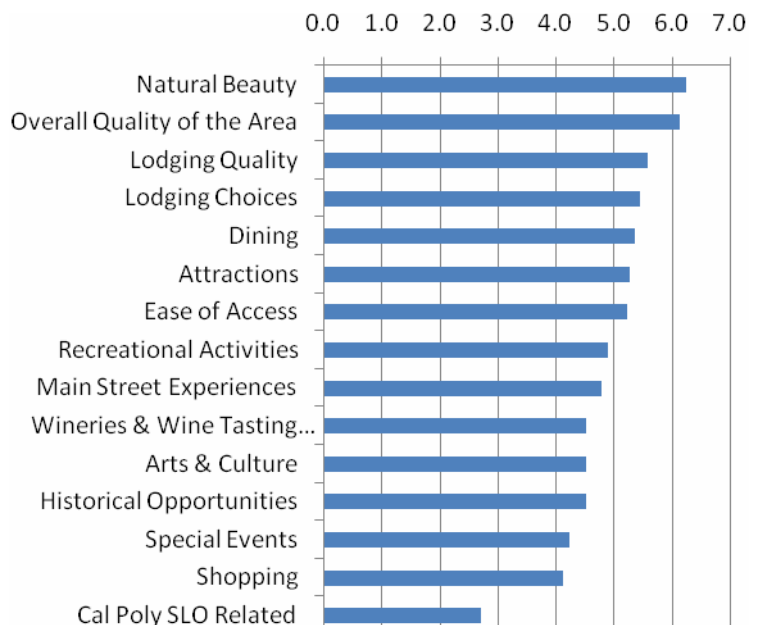


Figure 13
Importance on Decision to Visit SLO County
Base: Had Visited SLO County in the Past 24 Months



Section IV: Reasons for Visiting/Not Visiting SLO County

The survey asked SLO County visitors to rate the importance of several attributes on their decision to visit, and asked non-visitors for the primary reason they did not visit SLO in the past 24 months.

I. Reasons for Visiting

Respondents rated the importance of several attributes on their decision to visit SLO County on a scale of 1 (not at all important) to 7 (very important).

Most Important Attributes

- Natural beauty received the highest importance ratings, averaging 6.3 out of 7 among all SLO visitors.



- Overall quality of the area also received very high ratings, averaging 6.1 among SLO visitors.
- Other important attributes included lodging quality (5.6), lodging choices (5.5), dining (5.4), attractions (5.3), and ease of access (5.2).
- In general, the most important attributes varied little across master tab groups.
 - However, not surprisingly, Californians considered ease of access somewhat more important in their decision to visit SLO County (5.3) than those who lived elsewhere (5.0).

Figure 14
BY AGE: Importance on Decision to Visit SLO County
 Base: Had Visited SLO County in the Past 24

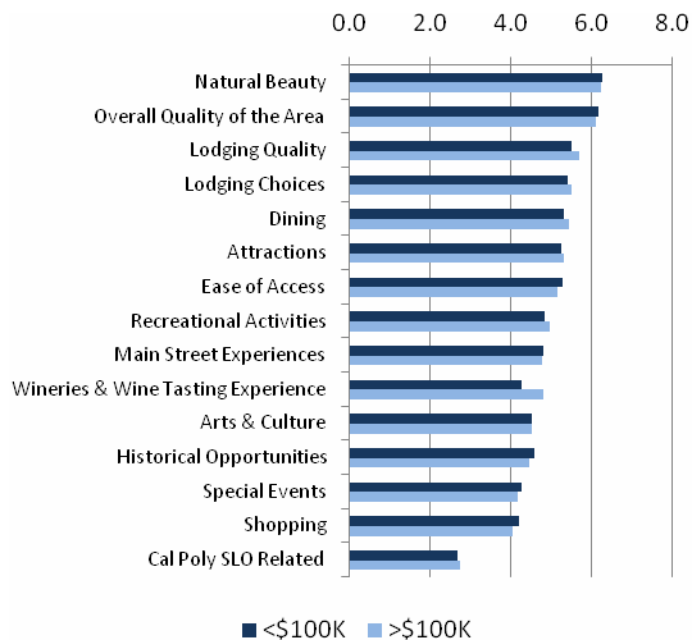


Months

Least Important Attributes

- Respondents as a whole considered Cal Poly, San Luis Obispo, the least important factor in their decision to visit, averaging 2.7 out of 7.
- Younger respondents and Californians considered Cal Poly SLO slightly more important to their decision to visit (2.9 and 2.8, compared with 2.6 and 2.5 among older and non-Californian respondents, respectively).
- Respondents considered all other attributes at least somewhat important in their decision to visit. However, shopping (4.1), special events (4.2), and historical opportunities, arts and culture and wineries (4.5 each) received the lowest ratings.

Figure 15
BY INCOME: Importance on Decision to Visit SLO County
 Base: Had Visited SLO County in the Past 24 Months



II. Reasons for Not Visiting

Respondents who had not visited SLO County in the past 24 months selected the primary reason they had not visited.

“Didn’t Go This Time, But Will in the Future”

- 41% of respondents stated that they still plan to visit SLO County in the future, making it the most common reason for not visiting.
 - Higher-income respondents were more likely to select this reason (46%) than lower-income respondents (37%).
 - Californians were slightly more likely to select this reason (43%) than non-Californians (39%).

“Went Elsewhere”

- 22% of respondents stated that they went elsewhere.
 - Higher-income respondents were significantly more likely to select this reason (29%) than lower-income respondents (18%).
 - Older respondents and Californians were somewhat more likely to select this reason (24% each) than younger respondents (19%) and non-Californians (20%).

“Did Not Take Any Trip”

- 19% of respondents stated that they did not take a trip to any destination.
 - Lower-income respondents were much more likely to have not taken a trip (25%, compared with only 8% among higher-income respondents).

Figure 16
BY GEOGRAPHIC ORIGIN: Importance on Decision to Visit SLO County
 Base: Had Visited SLO County in the Past 24 Months

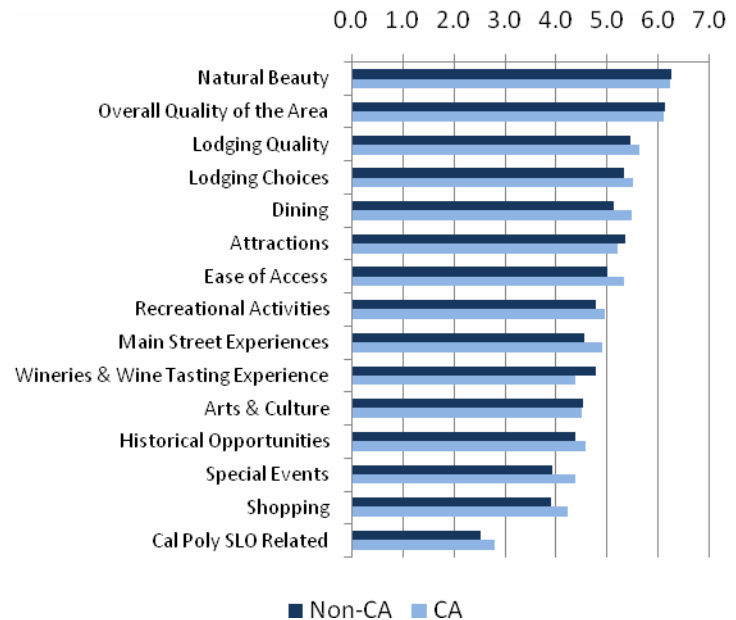
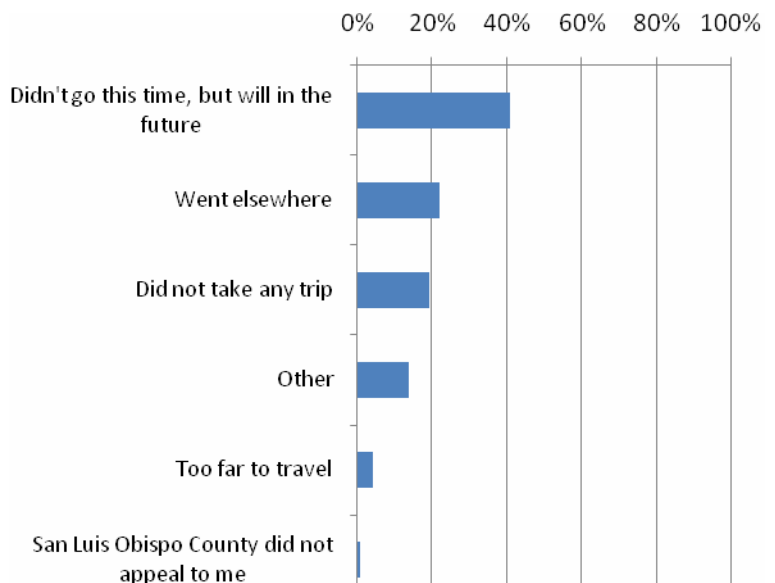


Figure 17
Primary Reason for Did Not Visit SLO County
 Base: Had Visited SLO County in the Past 24 Months



- Non-Californians were somewhat more likely to have not taken a trip (22%, compared with 15% among Californians).

“Too Far to Travel”

- Only 4% of respondents stated that SLO County was too far to travel.
 - Lower-income respondents were slightly more likely say that SLO County was too far to travel (5%, compared with 2% among higher-income respondents).
 - This percentage varied little by other master tab groups.

“SLO County Did Not Appeal to Me”

- Less than 1% of respondents stated that SLO County did not appeal to them.

Section V: SLO County Travel Behavior

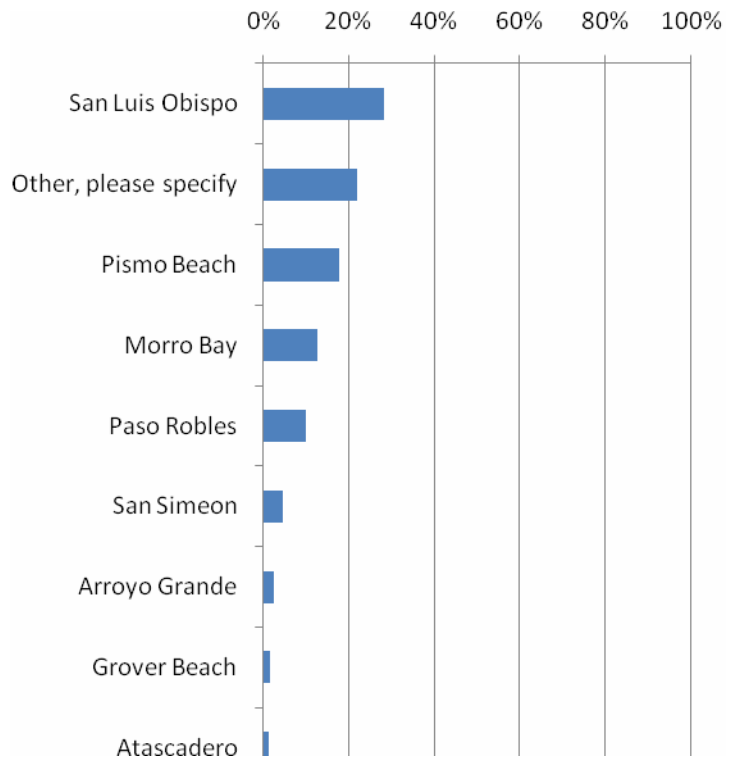
The survey asked SLO County visitors several questions about their last trip to SLO County.

I. Area Visited

Respondents selected the primary area they visited or stayed in during their last trip to SLO County. Choices included Arroyo Grande, Atascadero, Grover Beach, Morro Beach, Paso Robles, Pismo Beach, San Luis Obispo, and San Simeon.

- Over a quarter of respondents (28%) stayed in San Luis Obispo, the highest percentage of any area overall and across master tab groups.
- 18% stayed in Pismo Beach.

Figure 18
Area Visited on Last Trip to SLO County
 Base: Had Visited SLO County in the Past 24 Months



- Californians were more likely to stay in Pismo Beach (20%) than non-Californians (14%).
- 13% stayed in Morro Bay. This percentage varied little by master tab groups.
- 10% stayed in Paso Robles.
 - Non-Californians and those with higher incomes were slightly more likely to stay in Paso Robles (14% and 13%, respectively) than Californians and those with lower incomes (8% each).
- Less than 5% of respondents stayed in San Simeon (4.5%), Arroyo Grande (2%), Grover Beach (2%) or Atascadero (1%).

II. Day Trips and Overnight Visits

SLO visitors specified how many day trips and overnight visits they had taken to SLO County in the past 24 months.

- 95% of visitors had taken at least one overnight trip, and 58% had taken at least one day trip to SLO County in the past 24 months.
- Overall, visitors had taken an average of 3.2 overnight visits and 2.1 day trips to SLO County in the past 24 months.
- In general, the number of day and overnight visits varied little by master tab groups.

Figure 19
Average Number of Day Trips Taken to SLO County
Base: Had Visited SLO County in the Past 24 Months

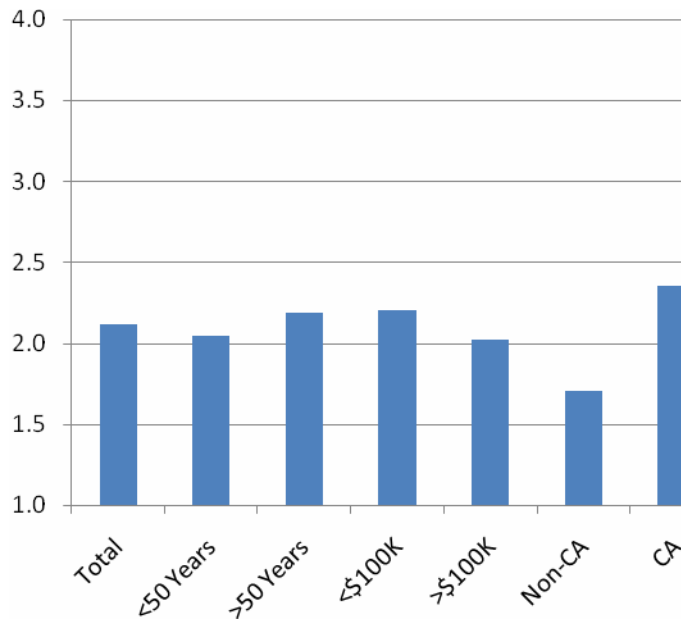
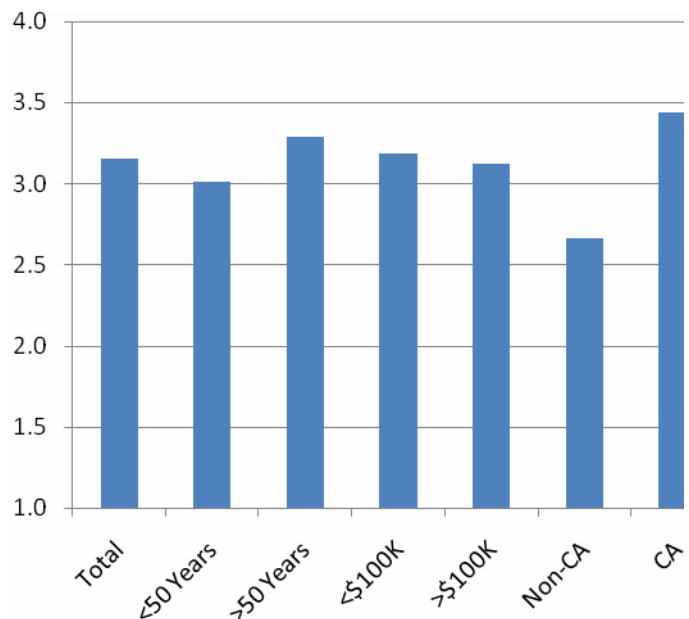


Figure 20
Average Number of Overnight Trips Taken to SLO County
Base: Had Visited SLO County in the Past 24 Months



- However, not surprisingly, California respondents averaged a higher number of overnight visits (3.4) and day trips (2.4) to SLO County than non-California respondents (2.7 and 1.7, respectively).

III. Number of Nights Stayed

Overnight visitors were asked to specify the number of nights they stayed in SLO County during their last overnight visit.

- Overall, overnight visitors stayed an average of 3.4 nights on their last visit to SLO County.
 - Not surprisingly, non-California respondents had significantly longer stays (4.1 nights) than Californian respondents (2.9).
 - Older respondents averaged slightly longer stays (3.5 nights) than younger respondents (3.2 nights).
 - The average number of nights varied little between higher and lower income respondents (3.4 and 3.3, respectively).

IV. Festivals Attended

The survey asked SLO County visitors if they had attended any festivals in SLO County in the past 24 months, including the Festival Mozaic, the Central Coast Renaissance Festival, the Central Coast Shakespeare Festival or the San Luis Obispo International Film Festival.

- Overall, only 12% of SLO visitors had attended a festival in the past 24 months.

Figure 21
Average Number of Nights Stayed in SLO County
Base: Had Taken an Overnight Trip to SLO County in the Past 24 Months

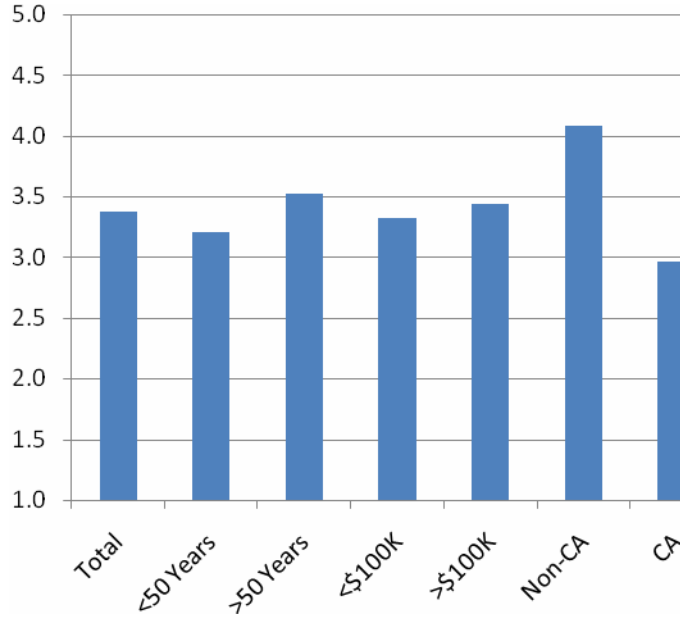
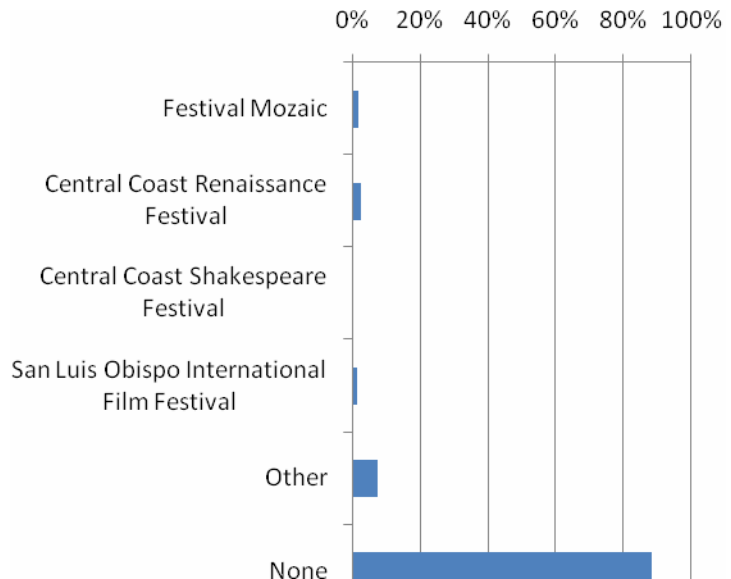


Figure 22
Festivals Attended in SLO County
Base: Had Visited SLO County in the Past 24 Months



- In general, between 2% and 3% of respondents had attended each festival. Percentages were too small to analyze by master tab group.
- Less than 1% of respondents had attended the Central Coast Shakespeare Festival.
- 8% of respondents had attended a festival not listed. These included wine festivals, the Harvest Festivals, car shows, farmers markets and musical events. See Table 1.

Table 1. Other SLO Festival Attended in Past 24 Months

# Resp	Festival Name/Type
23	Wine Festival
9	Farmers market
7	Car Show
5	Harvest Festival
5	Strawberry Festival
4	Mid-State Fair
4	Other Music
3	Morro Bay Harbor Fest
2	Plaza Concerts
2	Bicycle Rally
2	Street Fair
2	Plein Air
1	Italian Street Painting Festival
1	Beer Fest
1	Hospice du rhone
1	4TH JULY
1	Morro Bay Margarita and Avocado Festival
1	Christmas boat parade
1	Avila Concours d'elegance
1	Amgen tour
1	Central coast Quilt Run
1	Morro Bay Kite Show
1	Olive Fest
1	Contra Carnivale dance festival
1	Portugese celebration
1	Mozart festival
1	San Luis Symphony Concert
1	Art in the Park at Shell Beach
1	Blues at Avila Beach

Section VI: Satisfaction and Future Visits

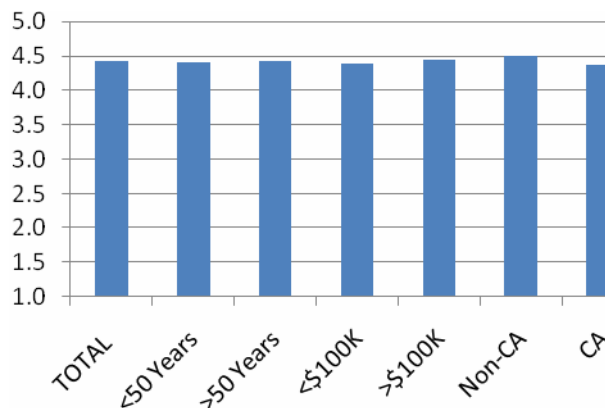
The survey asked visitors to evaluate their overall satisfaction with their visit to SLO County and asked all respondents to indicate the likelihood they would visit SLO County in the next 12 months

I. Overall Satisfaction

SLO County visitors rated their satisfaction with their most recent visit to SLO County on a scale of 1 (poor) to 5 (excellent).

- Satisfaction ratings were very high, with visitors averaging a rating of 4.4.
 - This rating varied little among master tab groups. All groups averaged a rating of 4.4, except for non-Californians, who averaged a rating of 4.5
 - No respondents – out of all 1,111 visitors – gave a “poor” rating, and only 3 respondent sgave a “below average rating.”

Figure 23
Satisfaction with Most Recent Visit to SLO County
Base: Had Visited SLO County in the Past 24 Months

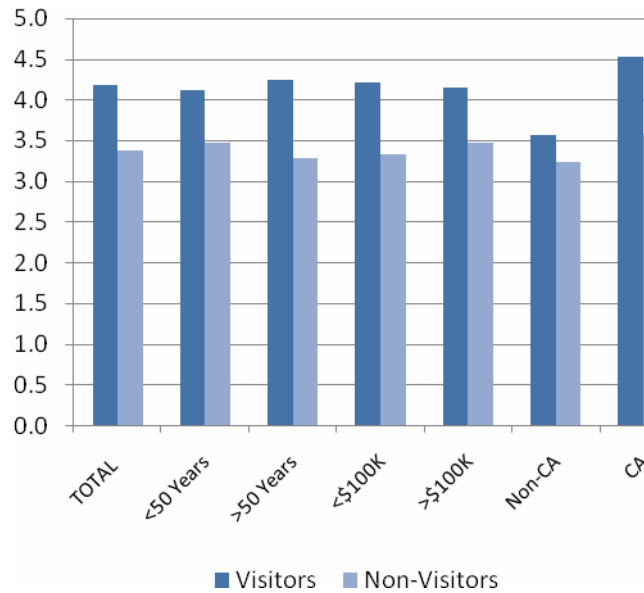


II. Likelihood of Future Visit

SLO County visitors and non-visitors rated the likelihood that they would visit SLO County in the next 12 months on a scale of 1 (very unlikely) to 5 (very likely).

- Overall, respondents who had visited SLO County in the past 24 months were more likely to return in the next 12 months.
 - Visitors averaged a likelihood rating of 4.2 out of 5, compared with 3.4 among non-visitors.
- By master tab groups, ratings varied little by age or income.
 - Among both visitors, Californians averaged 4.5, compared with 3.6 among non-Californians.
 - Among non-visitors, Californians averaged 3.6, compared with 3.2 among non-Californians.

Figure 24
Likelihood of Visiting SLO County in the Next 12 Months
Base: Had/Had Not Visited SLO County in the Past 24 Months



Section VII: Conclusions

- The survey indicates that people who inquired about travel information for SLO County were likely to visit SLO County.
- Those who did visit were likely to be very satisfied with their trip to SLO County.
- Visitors considered "natural beauty" and "overall quality of the area" as the most important attributes in their decision to visit SLO County.
- Few visitors considered Cal Poly SLO an important factor in their decision to visit.
- Most respondents listed "special events" as less important in their decision to visit SLO County. Additionally, only 12% of visitors had attended a festival in SLO during the past 24 months and, among these, 8% listed events not listed in the survey (primarily wine festivals, farmers markets and car shows).
- Respondents who did not visit were most likely to still be planning a visit to SLO County. Few respondents reported they did not visit SLO County because it was too far away, and almost no respondents stated they did not visit because SLO County did not appeal to them.
- Respondents who had visited Monterey and Santa Barbara Counties generally gave SLO County slightly favorable ratings over Monterey and Santa Barbara. Those who had visited SLO County generally gave more favorable ratings than those who had not.
- In general, most respondents indicated they were likely to visit SLO County in the next 12 months. Respondents who had already visited SLO County and those who were from California were more likely to believe they would visit in the future than those who had not visited SLO County and were non-Californians.

APPENDIX: Survey

San Luis Obispo County Survey

Greetings Travel Enthusiast,

Our records indicate that you have inquired about visitor information for San Luis Obispo County during the past 24 months. We would like to ask you to participate in a short survey. By participating, you will be entered to win a free 3 day/2 night vacation for 2 in San Luis Obispo County. Your information will be kept confidential and used for statistical purposes only to help us improve our visitor information.

Thank you for your participation.

1. What state do you live in?

2. Where do you live in California?

Northern California

Central California

Southern California

3. Have you taken a trip to San Luis Obispo County in the past 24 months? (Areas include Arroyo Grande, Atascadero, Cambria, Grover Beach, Morro Bay, Paso Robles, Pismo Beach, San Luis Obispo and San Simeon.)

Yes

No

4. Where did you stay on your last trip to San Luis Obispo County?

Arroyo Grande

Atascadero

Grover Beach

Morro Bay

Paso Robles

Pismo Beach

San Luis Obispo

San Simeon

Other, please specify

5. In the past 24 months, how many DAY trips have you taken to San Luis Obispo County?

0

1

2

3

4

5

6-10

10+



6. In the past 24 months, how many OVERNIGHT trips have you taken to San Luis Obispo County?

- 0
- 1
- 2
- 3
- 4
- 5
- 6-10
- 10+

7. How many nights did you stay in San Luis Obispo County on your last overnight trip?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10+

8. On a scale of 1 to 7, with 1 being not at all important and 7 being very important, please rate each of the following in your decision to visit San Luis Obispo County.

- Lodging Quality
- Dining
- Natural Beauty
- Attractions
- Recreational Activities
- Arts and Culture
- Historical Opportunities
- Main Street Experiences
- Special Events
- Shopping
- Wineries and Wine Tasting Experience
- Ease of Access
- Overall Quality of the Area
- Cal Poly SLO Related

9. Have you attended any festivals in San Luis Obispo County in the past 24 months?

- Yes, the Festival Mozaic
- Yes, the Central Coast Renaissance Festival
- Yes, the Central Coast Shakespeare Festival
- Yes, the San Luis Obispo International Film Festival
- None
- Other, please specify



10. How would you rate your overall satisfaction with your most recent trip to San Luis Obispo County?

Poor Below Average Average Very Good Excellent

11. How likely are you to return to San Luis Obispo County in the next 12 months?

Very Unlikely Somewhat Unlikely Not Sure Somewhat Likely Very Likely

12. What was the primary reason you did not visit San Luis Obispo County in the past 24 months?

- Did not take any trip
- Went elsewhere
- Too far to travel
- San Luis Obispo County did not appeal to me
- Didn't go this time, but will in the future
- Other, please specify

13. How likely are you to visit San Luis Obispo County in the next 12 months?

Very Unlikely Somewhat Unlikely Not Sure Somewhat Likely Very Likely

14. In the past 24 months, have you taken a trip to Monterey County?

- Yes
- No

15. Compared with Monterey County, how would you rate San Luis Obispo County on each of the following?

- Lodging Choice
- Lodging Quality
- Dining
- Natural Beauty
- Attractions
- Recreational Activities
- Arts and Culture
- Historical Opportunities
- Main Street Experiences
- Special Events
- Shopping
- Wineries and Wine Tasting Experience
- Ease of Access
- Overall Quality of the Area

16. In the past 24 months, have you taken a trip to Santa Barbara County?

- Yes
- No

17. Compared with Santa Barbara, how would you rate San Luis Obispo County on each of the following?

- Lodging Quality
- Dining
- Natural Beauty



- Attractions
- Recreational Activities
- Arts and Culture
- Historical Opportunities
- Main Street Experiences
- Special Events
- Shopping
- Wineries and Wine Tasting Experience
- Ease of Access
- Overall Quality of the Area

18. Which other California coastal destinations have you visited in the past 24 months?

- Carlsbad
- Huntington Beach
- Marin County
- Mendocino County
- Newport Beach
- Point Reyes Area
- San Diego Area
- Santa Cruz
- Santa Monica
- Venice Beach
- Ventura
- None
- Other, please specify

19. What is your zip code?

20. How old are you?

- Under 25
- 25-30
- 31-40
- 41-50
- 51-60
- 61-70
- 71-75
- 75+

21. Which category best describes your annual household income before taxes?

- \$0-29,999
- \$30-39,999
- \$40-49,999
- \$50-59,999
- \$60-69,999
- \$70-99,999
- \$100-149,999
- \$150-249,999
- \$250-349,999
- \$350-499,999



\$500,000+