

# Feeder Market Study

PRESENTATION PREPARED FOR:

---

Visit San Luis Obispo County

---

May 6, 2016



# Presentation Outline

---

- **Introduction**
  - Background
  - Objectives
  - Methodology
  - Target Audience
  - Statistical Notation
- **Conclusions**
- **Detailed Findings**
  - Travel and Awareness
  - Past Visitors
  - Prospective Visitors
- **Summary of DMA Differences**

# Background

---

- **Visit San Luis Obispo County (VSLOC) wants to more clearly define existing and prospective visitors to the County**
- **Specifically VSLOC wants to understand if residents of regional Designated Marketing Areas (DMAs) have an awareness of San Luis Obispo County as a destination and the thoughts and attitudes related to why people would or would not visit**

# Objectives

---

**The specific objectives of this research are as follows:**

- 1. Understand why travelers choose or do not choose SLO County as a leisure vacation destination.**
- 2. Understand and measure the awareness of SLO County as a leisure travel destination – including geographic awareness.**
- 3. Understand and measure the awareness and value of specific areas/communities within the County, for example:**
  - Pismo Beach
  - Paso Robles
  - Morro Bay
  - Hearst Castle
- 4. Understand and measure the awareness and value of specific assets inside the county, including (but not limited to):**
  - Shopping
  - Dining
  - Outdoor activities
  - Beaches region

# Methodology

- An online study of 1,254 respondents among visitors and prospective visitors to SLO County
- Interviews were conducted among past or prospective visitors to SLOC and who reside in one of the following feeder markets (DMAs) as distributed below:

	San Francisco	Los Angeles	Central Valley	Phoenix	San Diego	Las Vegas	Seattle	TOTAL
Past or Prospective Visitor from DMA to SLOC	252	250	150	150	152	150	150	1,254

- Respondents were sent an email invitation containing a link to the survey and screened online
- Surveys completed in March 2016
- The average survey length was approximately 16 minutes

# Target Audience

---

- **In order to participate in this research, all respondents had to meet the following criteria:**
  - Age 22-76 yrs.
  - No sensitive employment
  - Be a resident of one of the following DMAs: San Francisco, Los Angeles, Central Valley, Phoenix, San Diego, Las Vegas, or Seattle
  - Have completed at least one overnight trip in the US in the past 12 months
  - Visited SLOC in the past year or are considering visiting in the next 1-2 years. (See next page for details).

# Target: Past/Prospective Visitor

## Past Visitor:

- Aware of SLOC
- Visited SLOC for leisure (involving an overnight stay) at least once in the past 12 months
- Play a decision maker role in deciding where to stay for leisure travel for themselves and/or other members of their travelling party
- HHI \$50K+ if single or divorced; \$75K+ if married or living with partner
- Mix of gender

## Prospective Visitor:

- Aware of SLOC
- Very/somewhat likely to visit SLOC for a leisure trip involving an overnight stay in the next 24 months
- Play a decision maker role in deciding where to stay for leisure travel for themselves and/or other members of their travelling party
- HHI \$50K+ if single or divorced; \$75K+ if married or living with partner
- Mix of gender

# Conclusions



# Why Knows Us?

---

- **Awareness of SLOC is highest in SD, LA, Central Valley and SF and lowest in Phoenix, Las Vegas and Seattle**
- **Awareness of competing CA counties is highest for Santa Barbara**
- **Community awareness is highest for:**
  - PCH 1
  - City of SLO (especially LA and SD)
  - Pismo/Shell Beach
  - Cal Poly State
- **About 2 in 3 Past and Prospective visitors know SLOC is located in the Central Coast. Among these, 6 in 10 accurately place it as half-way between LA and SF.**

# Who Visits And Will Visit?

---

- Incidence of past/future visitors is highest in Central Valley and lowest in Seattle and Phoenix
- Visitors: 2 visits past year, spent \$1,800 (33% of total annual spend and highest in Seattle and Las Vegas), half travel as a couple and warmer months most popular
- Recent visitation to SLOC is strongest among Central Valley residents
- Planned visitation to SLOC is also strongest among Central Valley residents. SF residents are the “toughest sell”

# Who Visits And Will Visit?

---

- **The main reason for not visiting SLOC was lack of familiarity with the area**
  - This was particularly strong barrier among Seattle residents
- **Other barriers to visitation were:**
  - Others areas are closer (especially SF and Las Vegas)
  - Other areas easier to get to (especially SF, Central Valley and Las Vegas)
  - Lacks things important to me (especially SF and Central Valley)

# Who Visits And Will Visit?

---

- **Visitation to competing CA counties varies by market and is strongest in:**
  - LA Santa Barbara
  - SF Napa, Sonoma and Monterey
  - LV Santa Barbara
  - CV Monterey
  - SD Santa Barbara
  - PH Santa Barbara
  - SEA Santa Barbara

# What Do They Think Of Us?

---

- **The best descriptors of SLOC are:**
  - Relaxed (especially LA)
  - Friendly
  - Scenic (especially SD)
  - Fun (especially Central Valley)
  - Casual
- **Relaxation and Beaches are the top two priorities for vacationers and SLOC delivers on both accounts**
- **Beaches and weather are the main draws to SLOC. Dining and wine tasting (especially Los Angeles) are also important drivers to prospective visitors**

# What Do They Think Of Us?

---

- **Areas of weakness, that would benefit from being addressed, include:**
  - Historical or cultural attractions
  - Adventure activities
  - Shopping

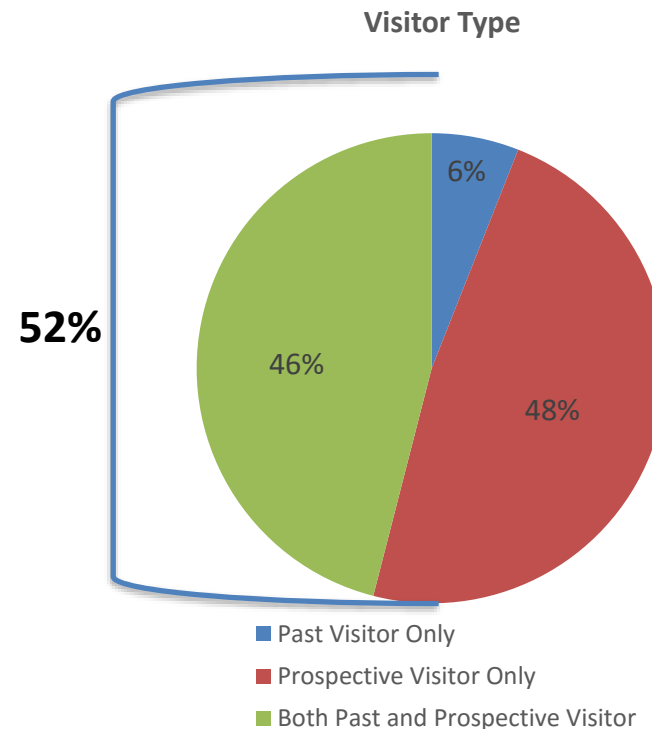
# Detailed Findings

# Travel and Awareness



# Visitor Type

- Almost half of respondents are both past and prospective visitors to SLOC, with only 6% being a past visitor with no intention of visiting again in the next 24 months



Base: Total (n=1,254)

# Visitor Type by DMA

- The following table shows the study incidence and visitor type by DMA. Central Valley has the highest incidence and a higher composition of past visitors compared to most other DMAs.

Base: Total	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Study Incidence (N)</b>	2948	577	556	226	417	332	353	474
Past Visitor	44%	45%	46%	68%	37%	47%	43%	33%

Base: Total	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Visitor Type (N)</b>	1254	252	250	150	150	152	150	150
Past Visitor	52%	48%	52%	62% BCEH	45%	53%	55%	48%
Prospective Visitor	48%	52% D	48% D	38%	55% D	47%	45%	52% D

# SLO County Awareness

- Seven in ten respondents claimed awareness of SLOC and an additional three in ten reported being aware of one or more of the 11 specific communities within SLOC that were tested

Base: Total (n=1,254)	% Aware
<b>Total</b>	<b>100%</b>
Aware of SLOC (Aided County List)	71%
Aware of SLOC (Aided Attraction List from SLOC and not included above)	29%

S5. Which of the following areas or counties, if any, are you aware of in California?/S6. California, if any, are you aware?

With which of the following places or communities in

# CA County Awareness

- Awareness of SLOC is highest in SD, LA, Central Valley and SF and lowest in Phoenix, Las Vegas and Seattle and Phoenix
  - Awareness of SLOC is at parity with Sonoma and lower than the others
- Awareness of Santa Barbara peaks in LA; peaks for Monterey in and SF and LA; Peaks in SD and SF for Napa and in SF and LA for Sonoma

Base: Total	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>County (N)</b>	1254	252	250	150	150	152	150	150
San Luis Obispo*	71%	75% EGH	78% EGH	76% EGH	64%	78% EGH	61%	56%
Santa Barbara	82%	79%	89% BDGH	79%	83% H	84% H	80%	74%
Monterey	76%	81% EGH	81% EGH	78% GH	71%	79% GH	69%	63%
Napa	75%	79% DGH	78% DH	67%	78% DH	80% DGH	71%	67%
Sonoma	69%	78% DEGH	73% DEGH	63%	65%	72% H	64%	61%

S5. Which of the following areas or counties, if any, are you aware of in California?/S6. With which of the following places or communities in California, if any, are you aware? \*Note: Awareness w/aided county list. 100% awareness of SLOC was a screening requirement.

# CA County Visits

- Half of the respondents have visited SLOC in the past 12 months and peaks in Central Valley
- Visitation is next highest to Santa Barbra County (especially in LA) followed by Napa (especially SF) and Monterey (especially SF)

Base: Total	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Counties (N)</b>	1254	252	250	150	150	152	150	150
San Luis Obispo County	52%	48%	52%	62% BCEH	45%	53%	55%	48%
Santa Barbara County	43%	33%	58% BDEFGH	38%	43% BH	45% BH	48% BDH	32%
Napa County	31%	46% CDEFGH	31% DH	20%	33% DH	28% D	33% DH	21%
Monterey County	31%	45% CEFGH	29% H	43% CEFGH	27% H	24%	25%	19%
Sonoma County	25%	44% CDEFGH	20%	15%	23%	18%	26% D	19%
None of the above	15%	10%	14%	9%	23% BCDG	20% BCDG	12%	26% BCDG

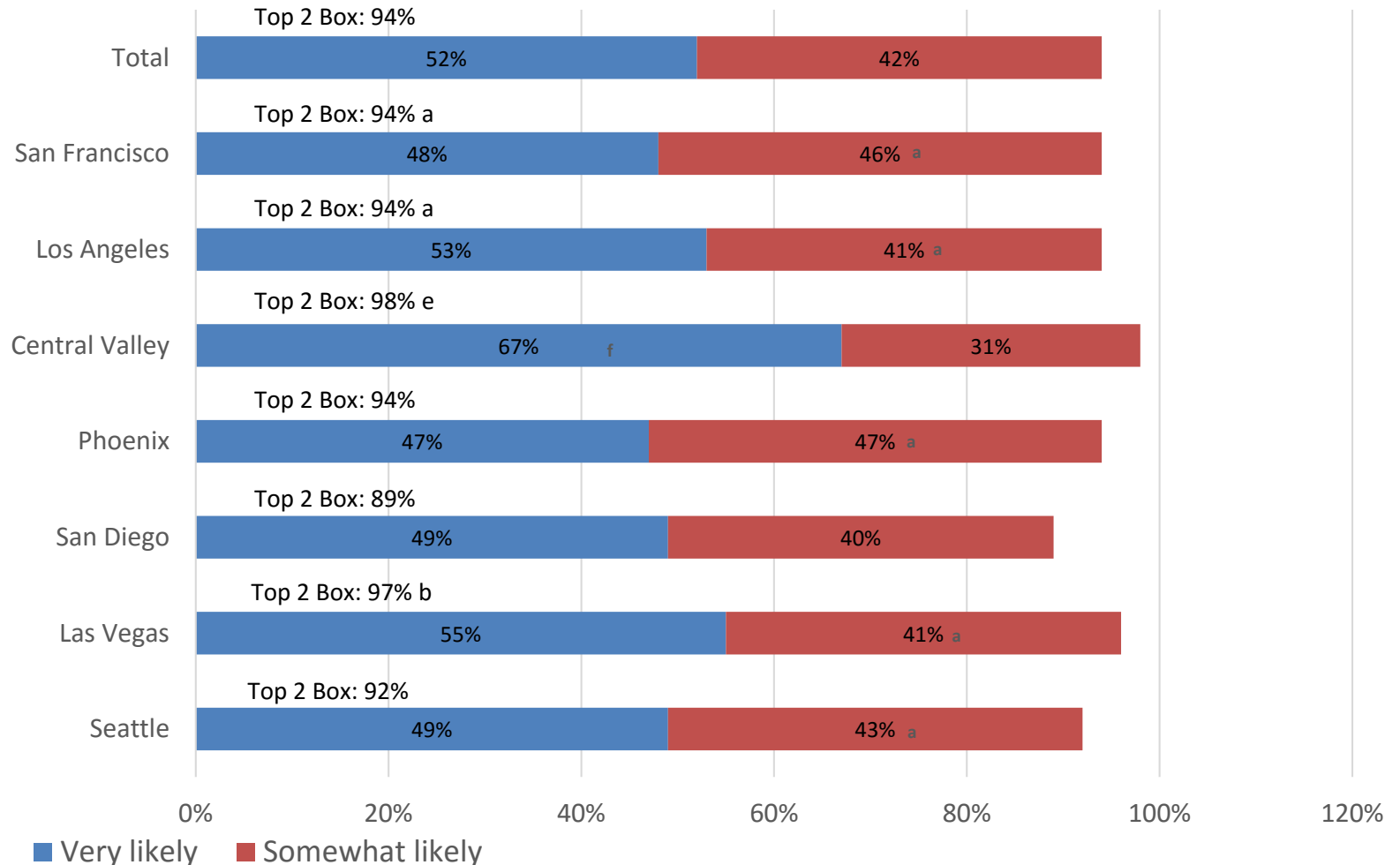
S6. To which of the following California counties, if any, have you visited in just the past 12 months for a leisure/vacation trip that involved an overnight stay?

# Likelihood of Visiting San Luis Obispo Cnty

---

- **Expected visitation to SLOC is highest in the Central Valley (two-thirds are very likely) and next highest in Las Vegas**
  - Expected visitation to SLOC is lowest in San Diego

# Likelihood of Visiting SLOC in Next 24 Months



Base: Aware of County. Total (n=1,254); San Francisco (n=252); Los Angeles (n=250); Central Valley (n=150); Phoenix (n=150); San Diego (n=152); Las Vegas (n=150); Seattle (n=150)

S10. How likely are you to visit each of the following counties for a leisure/vacation trip that involves an overnight stay in the next 24 months?



# Reasons for Not Visiting San Luis Obispo

---

- **Among those who have not visited SLOC in the past 12 months and also do not intend to visit in the next 24 months, the main reason for not visiting SLOC was lack of familiarity with the area**
  - This was particularly strong barrier among Seattle residents
- **Other barriers to visitation were:**
  - Others areas are closer (especially SF and Las Vegas)
  - Other areas easier to get to (especially SF, Central Valley and Las Vegas)
  - Lacks things important to me (especially SF and Central Valley)
- **Additional barriers to at least 1 in 5 respondents were:**
  - SF: Not enough to do there and other destinations offer higher quality experience
  - LA: Not enough to do there
  - Central Valley: Other destinations offer higher quality experience



# Reasons for Not Visiting SLO County

Base: Those Unlikely to Visit SLO in next 24 months	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Reasons for Not Visit (N)</b>	1098	231	205	33	183	119	123	204
Don't know enough about the area	36%	28%	33%	27%	40% BF	28%	42% BCF	49% BCDEF
Other destinations are closer	21%	28% EFH	21%	18%	17%	18%	25%	18%
Other destinations are easier to get to	19%	26% CE	8%	24% C	19% C	18% C	23% C	21% C
Lacks other things important to me	19%	26% CEGH	19%	24% G	18%	19%	12%	14%
Other destinations offer a higher quality experience	17%	23% CEH	16%	21%	12%	17%	18%	16%
Been there many times before	15%	19% GH	19% GH	15%	14%	17% H	11%	10%
Not enough to do there	15%	26% EFGH	21% EGH	18% EH	7%	17% EH	12% EH	4%
Other destinations offer a better family experience	14%	13%	14%	15%	17% F	8%	14%	13%
Doesn't provide a good value for the money	4%	2%	7% BFH	6%	3%	3%	7% B	3%

S11. Why are you unlikely to visit San Luis Obispo County for leisure/vacation in the next 24 months? All other mentions less than 3%. (Terminates)

# SLOC Community Awareness

---

- **SLOC community awareness is highest for:**
  - PCH 1
  - City of SLO (especially LA and SD)
  - Pismo/Shell Beach
  - Cal Poly State
- **Most of the other CA communities had higher awareness in LA and in Central Valley compared to the other markets**
- **Community awareness is lowest for:**
  - Atascadero/Templeton (especially Seattle, Phoenix and Las Vegas)
  - Avila Beach (especially Seattle, San Diego, Phoenix and Las Vegas)
  - Edna Valley (especially San Diego and Seattle)

# CA Community Awareness

Base: Total	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Communities (N)</b>	1254	252	250	150	150	152	150	150
Pacific Coast Highway 1	82%	83% G	85% G	80% G	87% G	88% DGH	71%	81% G
City of San Luis Obispo	77%	78% GH	85% BEGH	81% GH	73% G	89% BDEGH	61%	66%
Pismo Beach/Shell Beach	71%	75% EGH	79% EGH	78% EGH	65% H	78% EGH	58%	53%
California Polytechnic State University (San Luis Obispo Campus)	68%	72% GH	79% BDEFGH	66% G	66% G	71% GH	53%	59%
Morro Bay	62%	66% EGH	74% BEGH	79% BEFGH	49%	69% EGH	42%	42%
Paso Robles	61%	68% EGH	76% BEFGH	77% BEFGH	45%	66% EGH	39%	39%
San Simeon (Hearst Castle)/Cambria/Cayucos	60%	68% EGH	69% EGH	67% EGH	53% GH	70% EGH	36%	43%
Arroyo Grande/Grover Beach/Oceano	41%	39% H	54% BEFGH	60% BEFGH	31%	35% H	37% H	24%
Atascadero/Templeton	39%	46% EFGH	48% EFGH	59% BCEFGH	25%	33% H	25%	23%
Avila Beach	38%	40% EFGH	46% EFGH	69% BCEFGH	28%	24%	28%	23%
Edna Valley	22%	21%	22% F	27% F	21%	15%	27% F	19%

S6. Which of the following places or communities in California, if any, are you aware?

# Money Spent Traveling

- On average, respondents paid a total of \$5400 on leisure travel the past 12 months
  - This varies widely with 38% spending <\$2500 and 35% spending \$5,000+
- This also varies by market with those in SF, Las Vegas, LA and Seattle spending more than those in Central Valley or Phoenix

Base: Total	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Total Spent (N)</b>	1254	252	250	150	150	152	150	150
<b>(NET)</b> Under \$1,000	15%	14%	15%	20% G	16%	17%	13%	13%
Under \$499	4%	4%	4%	5% E	1%	5% E	2%	3%
\$500-\$999	12%	10%	11%	15%	15%	12%	11%	10%
\$1,000-\$2,499	21%	17%	19%	18%	28% BCDG	26% BCDG	16%	25% BG
\$2,500-\$4,999	29%	31%	29%	37% EFH	27%	24%	29%	25%
\$5,000-\$9,999	21%	21%	22%	19%	21%	19%	27% D	21%
<b>(NET)</b> \$10,000 Or More	14%	17% DE	15% DE	7%	8%	14% D	15% DE	16% DE
\$10,000-\$19,999	10%	12% DE	11% DE	4%	5%	9% D	12% DE	13% DE
\$20,000 or more	4%	6%	4%	3%	3%	5%	3%	3%
Mean	\$5396	\$5946 DE	\$5660 DE	\$4350	\$4570	\$5184	\$5932 DE	\$5582 DE

S8. In total, approximately how much money have you spent on leisure travel involving an overnight stay in the past 12 months?

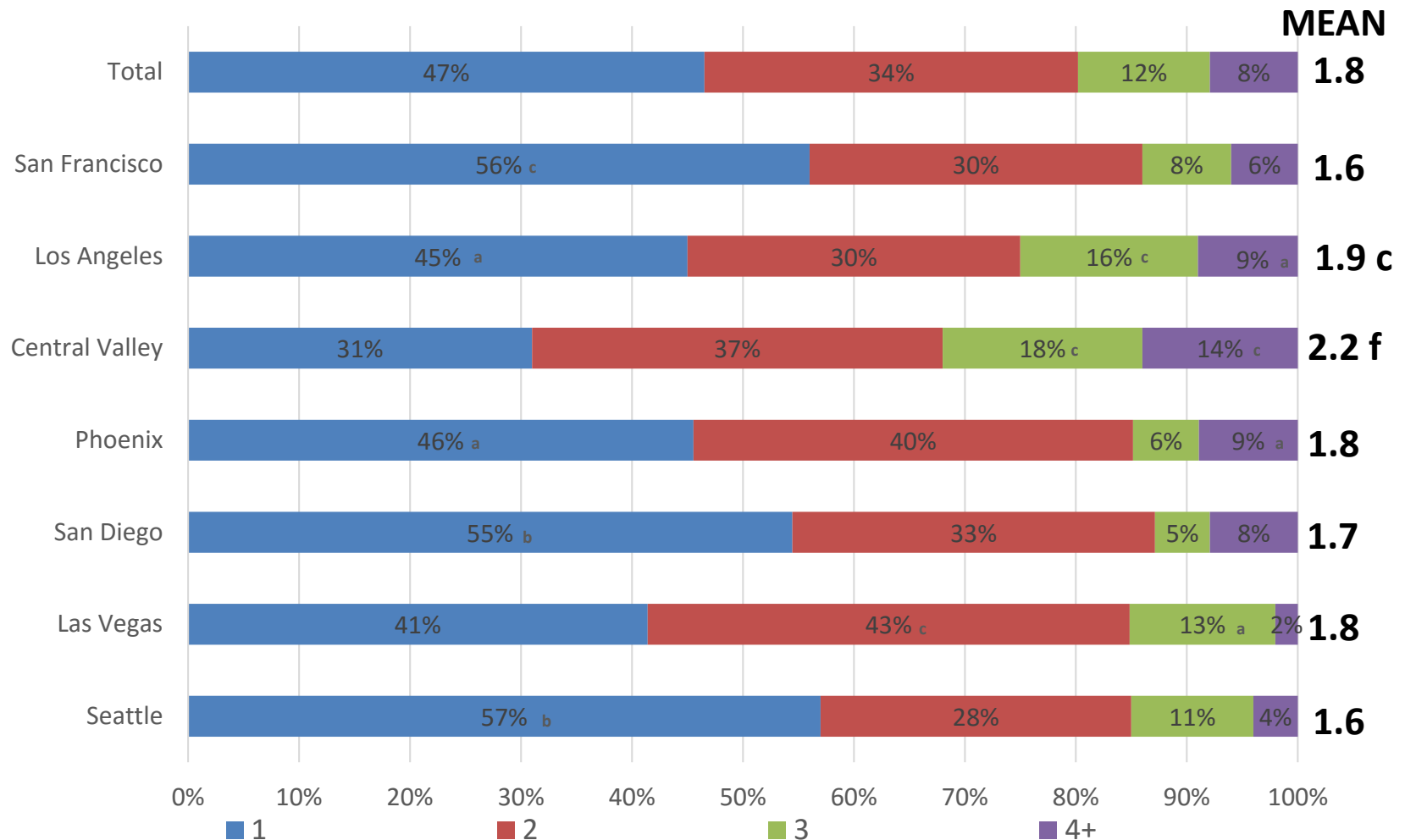
# Past Visitors

# Past Visit Summary

---

- **On average, past 12 month visitors to SLOC have made 1.8 trips there**
  - Central Valley visitors visit SLOC more often than others
- **The summer month (J/A/S) account for 33% of recent visits**
  - Visits are equally divided between high-May to Sept (47%) and low season-Oct to April
  - Phoenix and Seattle skew to the high season and Central Valley, LA and SF skew to the low season
- **About half of the visitors travel as a couple**
  - One in three traveled in a group of 3 or 4
  - One in ten have 5+ in their travel party and a similar number travel alone
- **On average, respondents paid \$1,800 on their most recent trip to SLOC, which is one third of their total travel spend**
  - Highest among visitors from Seattle and Las Vegas and lowest among visitors from Central Valley and SD

# Number of Visits to SLOC in P12 Months



Base Past Visitor: Total (n=648); San Francisco (n=122); Los Angeles (n=131); Central Valley (n=93); Phoenix (n=68); San Diego (n=80); Las Vegas (n=82); Seattle (n=72)

1. How many leisure/vacation trips that involved an overnight stay have you made to San Luis Obispo County in the past 12 months?

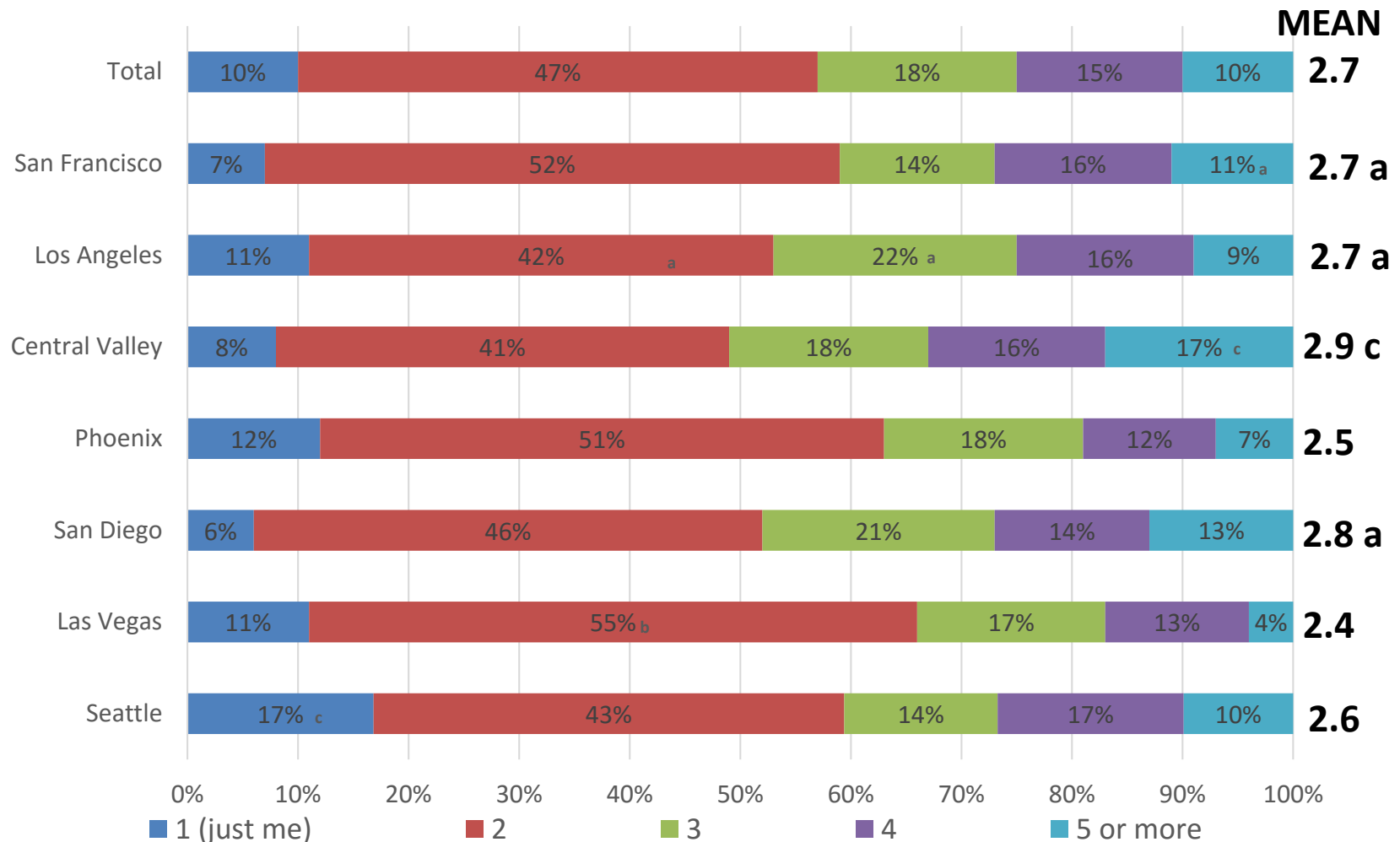
# When Was Most Recent Visit to SLOC

Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>When Visited (N)</b>	648	122	131	93	68	80	82	72
March 2015	6%	4%	8% G	5%	3%	11% BEG	2%	10% G
April 2015	6%	5% H	9% H	4% H	4% H	4% H	10% H	0%
May 2015	7%	9% D	5%	2%	9% D	11% D	5%	11% D
June 2015	7%	2%	7%	8% B	13% B	9% B	6%	8% B
July 2015	11%	6%	12% B	11%	18% B	11%	10%	14% B
August 2015	12%	17% H	11%	13%	10%	10%	11%	8%
September 2015	10%	9%	6%	6%	12%	5%	17% BCDF	15% CDF
October 2015	8%	7%	12% D	4%	13% D	6%	9%	6%
November 2015	9%	16% CDE	5%	8% E	1%	10% E	11% E	8% E
December 2015	8%	8%	8%	11%	9%	11%	6%	6%
January 2016	7%	8%	8%	9%	6%	4%	7%	8%
February 2016	6%	6%	5%	14% BCEFGH	1%	5%	4%	4%
March 2016	2%	2%	2%	5% E	0%	3%	2%	1%
<b>High Season (May-Sept.)</b>	47%	43%	42%	40%	62% BCDF	46%	49%	57% BCD
<b>Low Season (Jan-Apr., Oct.-Dec.)</b>	53%	57% EH	58% EH	60% EH	38%	54% E	51%	43%

2. When was your most recent leisure trip to San Luis Obispo County?



# Size of Most Recent Party



Base Past Visitor: Total (n=648); San Francisco (n=122); Los Angeles (n=131); Central Valley (n=93); Phoenix (n=68); San Diego (n=80); Las Vegas (n=82); Seattle (n=72)

2a. Including yourself, how many people, if any, traveled with you to San Luis Obispo County on this most recent trip?

# Traveling with Children

Base: Total Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Age of Children (N)</b>	648	122	131	93	68	80	82	72
(NET) Any Children	43%	39%	46% G	53% BG	44%	45%	33%	44%
Under age 2	6%	7% H	7% H	5%	4%	9% H	4%	1%
Age 2-5	13%	9%	14%	18% B	10%	14%	11%	17%
Age 6-12	26%	19%	27%	31% B	29% B	31% B	21%	28%
Age 13-17	18%	20%	17%	20%	13%	19%	16%	22%
None of the above	57%	61% D	54%	47%	56%	55%	67% CD	56%

2b. Did you travel with children from any of the following age groups?

# Money Spent in Most Recent Visit

Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Total Spent (N)</b>	648	122	131	93	68	80	82	72
(NET) Under \$500	25%	36% CEGH	18%	34% CEGH	19%	34% CEGH	15%	15%
Under \$100	2%	6% CEG	0%	4% CEG	0%	3% C	0%	1%
\$100-\$499	23%	30% CEGH	18%	30% CGH	19%	31% CEGH	15%	14%
\$500-\$999	32%	28%	35%	37%	32%	36%	26%	28%
\$1,000-\$2,499	23%	21%	24%	22%	31% F	18%	26%	22%
(NET) \$2,500 Or More	20%	15%	24% BDF	8%	18% D	13%	34% BCDEF	35% BCDEF
\$2,500-\$4,999	12%	11%	12%	6%	9%	11%	20% BDE	18% D
\$5,000-\$9,999	6%	2%	10% BDF	0%	9% BDF	1%	9% BDF	11% BDF
\$10,000 or more	2%	2%	2%	1%	0%	0%	6% CDEF	6% DEF
<b>Mean \$</b>	\$1827	\$1444	\$2085 BDF	\$1092	\$1833 DF	\$1189	\$2666 BDEF	\$2706 BCDEF

3. Approximately how much money did you spend, in total, in the county?

# Reasons for Visit

---

- **The top reasons for visiting SLOC were:**
  - Beaches (especially Central Valley visitors)
  - Weather (especially Seattle, Phoenix and Central Valley visitors)
- **Other frequently cited reasons for visiting include:**
  - Dining/restaurant options
  - Family friendly
  - Familiarity (especially Central Valley visitors)
  - Good value
  - High quality experience (especially LA visitors)
  - Exciting place to visit
  - Accessible/easy to get to

# Reasons for Visit

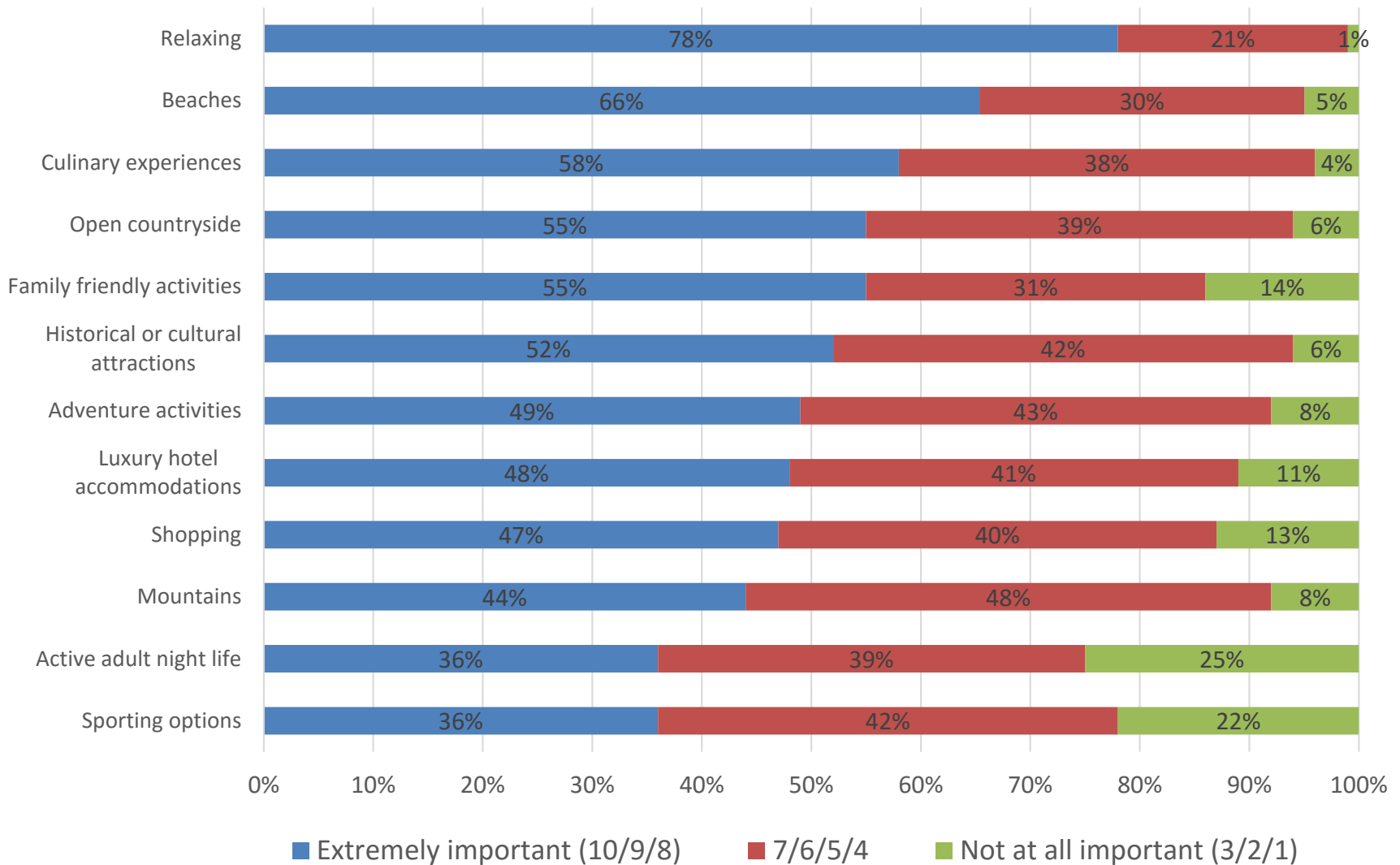
Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Reasons for Visit (N)</b>	648	122	131	93	68	80	82	72
Beach	47%	38%	44%	65% BCFG	62% BCFG	35%	43%	53% BF
The weather	47%	38%	50% BF	54% BF	56% BF	35%	45%	54% BF
Dining/restaurant options	38%	35%	46% BF	40%	44% F	30%	35%	36%
Family friendly	38%	30%	44% B	38%	41%	39%	39%	36%
Familiar with the area	37%	37%	42% EF	49% BEFGH	28%	30%	32%	33%
A good value for the money	35%	33%	40% F	34%	41% F	28%	34%	38%
It's a high quality experience	32%	30%	39% D	24%	37% D	30%	35% D	28%
It's an exciting place to visit	32%	28%	34%	28%	40% B	29%	37%	29%
It's accessible/easy to get to	30%	30%	34% H	38% H	28%	30%	27%	21%
Wine Tasting	27%	26%	30%	23%	25%	26%	27%	28%
Geographical proximity	23%	30% FGH	31% EFGH	34% EFGH	19% H	11%	18% H	8%
Offers the things that are important to me	22%	22%	24% H	31% EFH	18%	16%	26% H	14%
I was visiting another destination that was close by	22%	21% D	23% D	10%	18%	25% D	27% D	29% D
Offers luxury accommodations	21%	17%	30% BDFH	18%	19%	10%	32% BDEFH	18%
Was attending an event	15%	12%	11%	14%	10%	20% C	18%	18%
Visiting family/friends	4%	3%	2%	5%	3%	6%	4%	4%
Something else	5%	10% EG	5%	5%	1%	8% EG	1%	6%

4. What would you say are the primary reasons you chose this destination?

# Leisure/Vacation Factor Importance

- **The most important considerations for where to vacation are:**
  - Relaxation
  - Beaches
- **Next most important considerations for where to vacation are:**
  - Culinary experiences
  - Open countryside
  - Family friendly activities
- **Having an active night life and sporting events are less important to a majority**
- **Statistical differences (Top 3 Box):**
  - SF & Phx: Active adult night life are less important
  - LA: Beaches are less important
  - CV: Luxury hotel accommodations are less important
  - SD: Open countryside and Mountains are less important
  - LV: Active adult night life, Luxury hotels accommodations, Culinary experiences, Shopping & Mountains are more important

# Leisure/Vaca. Destination Factors-Total



6. How important are each of the following in deciding where you are going to visit? Base: n=648

# Past Visitors: SLOC Evaluation

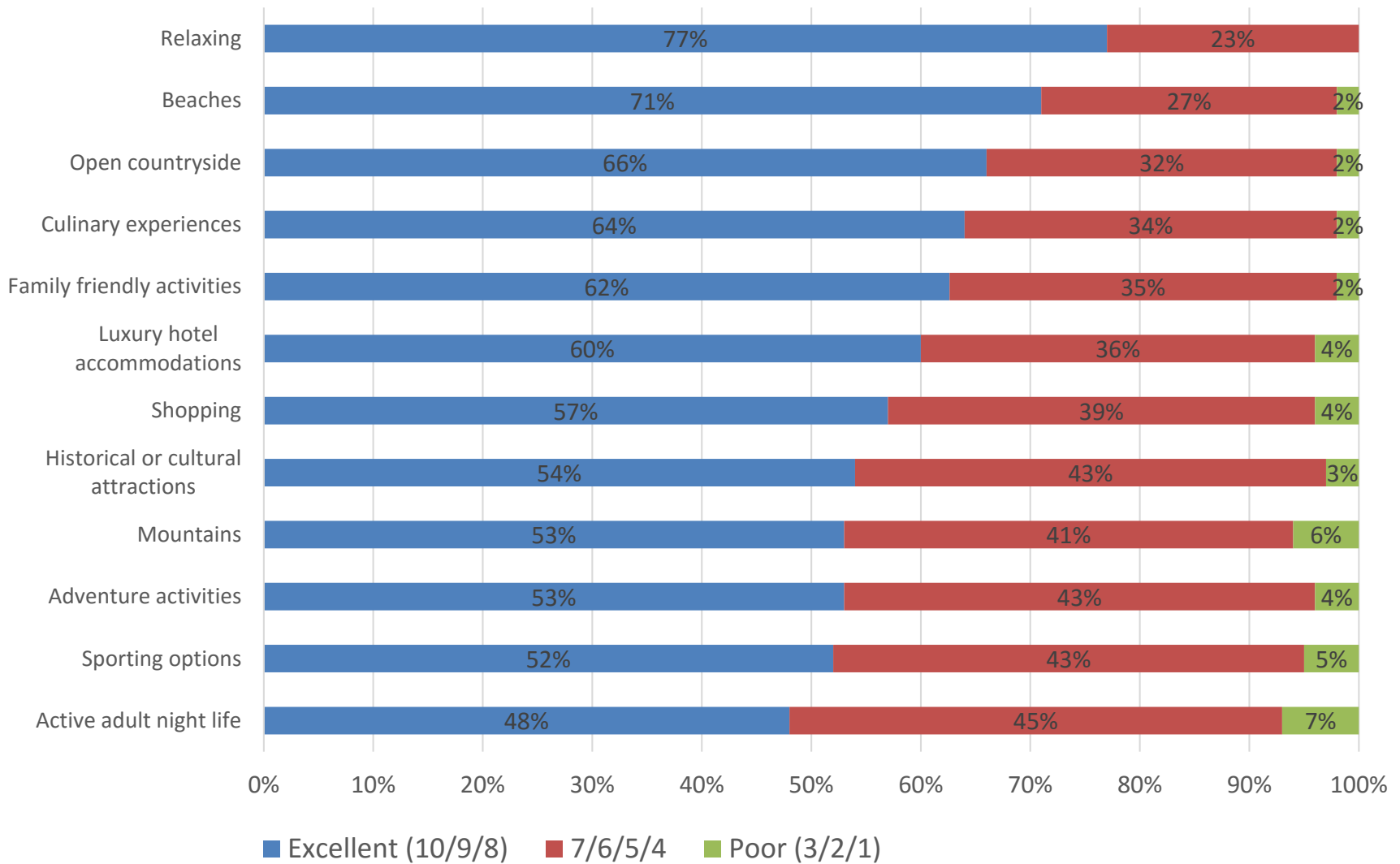


# San Luis Obispo County as a Destination

---

- **Perceptions of SLOC are strongest on the following considerations:**
  - Relaxing
  - Beaches
- **Perceptions are also strong on the following:**
  - Open countryside
  - Family friendly activities
  - Culinary experiences
- **Perceptions are least strong on the following:**
  - Active adult night life
  - Sporting options
  - Mountains

# San Luis Obispo County Ratings-Total



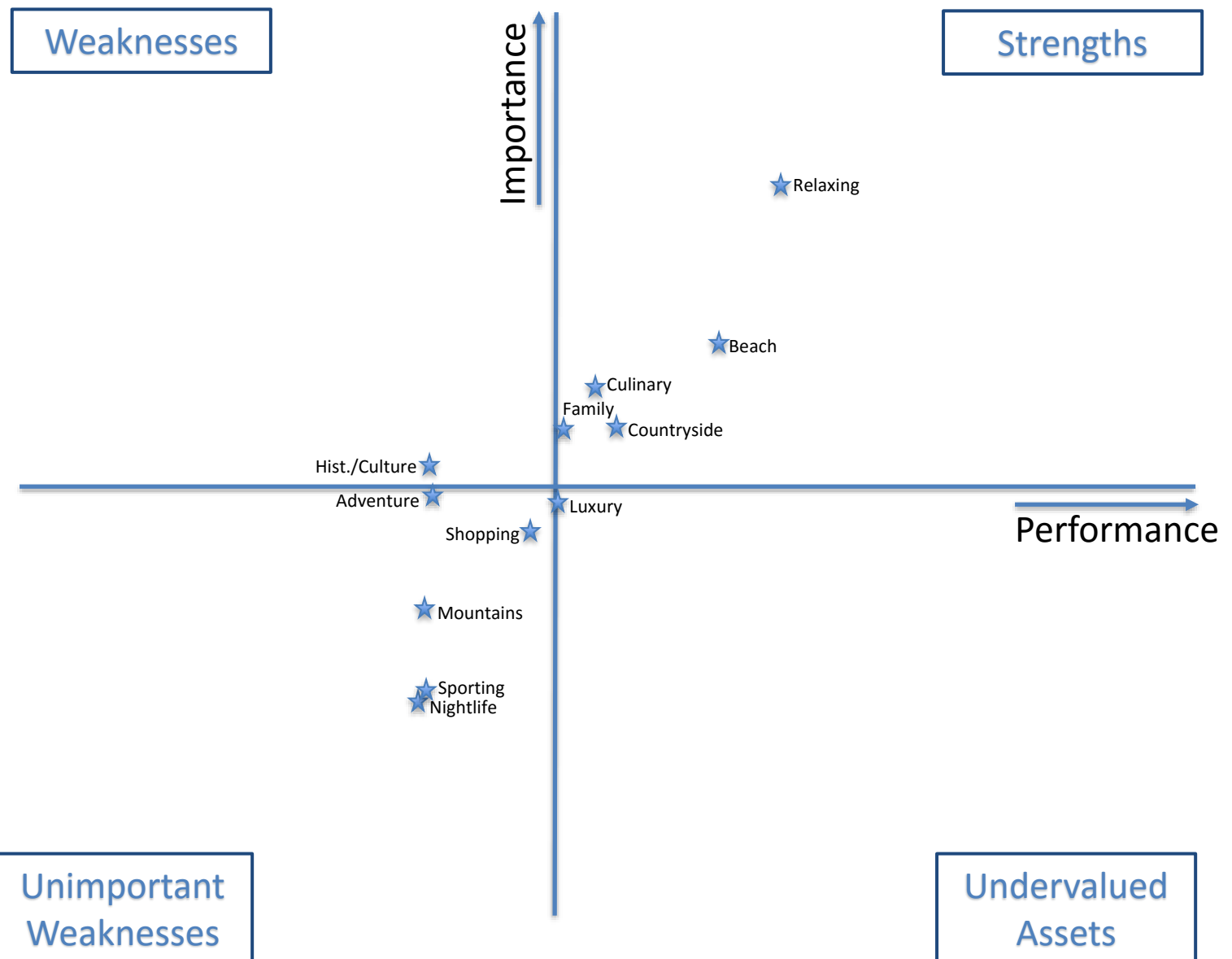
7. Please indicate how well do you think \_\_\_\_\_ County delivers on each of these factors. Base: n=648

# SLOC: Performance/Importance

---

- **As shown on the following page, SLOC is performing well on the factors that matter most to visitors. This is not surprising as this reflects the attitudes of recent SLOC visitors.**
- **Areas of strength, that should continue to be reinforced, include:**
  - Relaxation
  - Beaches
  - Culinary experiences
  - Family friendly activities
  - Open countryside
- **Areas of weakness, that would benefit from being addressed, include:**
  - Historical or cultural attractions
  - Adventure activities
  - Shopping

# SLOC: (Performance/Importance)



# SLOC: Gap Analysis by DMA

---

- **Enhancing perceptions of SLOC in the following areas are warranted:**
  - Adventure activities
  - Historical or cultural experiences
  - Relaxation
- **The following are areas where perceptions of SLOC do not need to be enhanced from the perspective of recent visitors:**
  - Sporting options
  - Luxury hotel accommodations
- **Comparing the ratings of SLOC on various attributes to the perceived importance of each factor we see:**
  - Central Valley most apt to view SLOC in a favorable light, followed by Phoenix
  - SF least apt to view SLOC in a favorable light
- **In total, SLOC is most apt to come up short in terms of:**
  - Relaxation, adventure activities and historical or cultural attractions

# SLOC: Gap Analysis by DMA

Base: Past Visitors (Top 3 Box Performance minus Top 3 Box Importance)	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Attribute (N)</b>	648	122	131	93	68	80	82	72
Beaches	6%	4%	12%	11%	7%	1%	-5%	7%
Active adult night life	13%	11%	12%	27%	7%	13%	0%	15%
Open countryside	11%	5%	9%	20%	6%	16%	12%	11%
Mountains	8%	3%	7%	18%	13%	15%	-1%	7%
Luxury hotel accommodations	13%	12%	14%	26%	12%	8%	10%	3%
Shopping	10%	5%	11%	20%	7%	6%	7%	11%
Historical or cultural attractions	2%	-2%	-2%	22%	7%	-13%	7%	-3%
Family friendly activities	7%	4%	5%	8%	13%	-1%	16%	13%
Sporting options	16%	19%	9%	33%	10%	19%	13%	10%
Relaxing	-1%	-4%	-2%	6%	1%	-4%	-1%	-4%
Adventure activities	5%	4%	-2%	23%	7%	-4%	0%	6%
Culinary experiences	6%	-1%	14%	11%	18%	1%	-2%	4%



=Negative



=Neutral



=Positive



# SLOC-Overall Opinion

- **One in five visitors consider SLOC as their very favorite leisure destination**
  - However, those in Central Valley are more apt to do so than others
- **A majority consider SLOC among their favorite leisure destination while one in four consider SLOC after considering other area**
  - Phoenix residents are the least positive followed by SF and SD residents

Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Overall Opinion (N)</b>	648	122	131	93	68	80	82	72
It's almost always the first place I consider for a leisure trip	19%	16%	16%	28% BCF	19%	14%	23%	21%
It's one of my favorite places to visit along with others	55%	52%	59% E	58% E	43%	55%	61% E	54%
It's a place I visit, but there are others I would consider before this one	24%	31% DG	24% D	13%	35% DG	26% D	16%	25% D
I have visited there but I am unlikely to visit again	2%	2%	1%	1%	3%	5% CGH	0%	0%

8. Which statement best describes your overall opinion of \_\_\_\_\_?

# SLOC: Descriptors

---

- **The best descriptors of SLOC are:**
  - Relaxed (especially LA)
  - Friendly
  - Scenic (especially SD)
  - Fun (especially Central Valley)
  - Casual
- **Very few consider SLOC to be rugged or snobbish**
- **Market differences include (where market indexes high):**
  - Central Valley: Fun, Casual, Youthful
  - LA: Quiet, Artsy
  - Phoenix: Authentic, Sophisticated
  - SD: Scenic, Unpretentious, Rural
  - SF: Unpretentious, Rural
  - Las Vegas: Sophisticated
  - Seattle: Excellence



# SLOC-Descriptors

Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Descriptors (N)</b>	648	122	131	93	68	80	82	72
Relaxed	54%	57% H	60% GH	55% H	63% GH	58% H	45%	38%
Friendly	52%	53% G	55% G	58% G	47%	56% G	40%	47%
Scenic	49%	50%	44%	55% G	50%	60% CGH	40%	44%
Fun	46%	40%	50% G	60% BFGH	49%	44%	37%	42%
Casual	42%	43% G	44% G	51% GH	41%	49% GH	32%	33%
Quality	35%	30%	38%	39%	41%	34%	30%	38%
Down to earth	33%	39% H	31%	33%	35%	39% H	28%	25%
Historic	32%	31%	37% G	35% G	32%	30%	22%	31%
Authentic	31%	25%	32%	28%	43% BDG	30%	29%	32%
Quiet	30%	32% G	40% EGH	29% G	22%	35% EG	18%	28%
Unique	29%	25%	27%	22%	37% D	35% D	27%	35% D
Exciting	28%	25%	34% F	29% F	35% F	16%	33% F	25%
Tasteful	28%	21%	31% B	31%	35% B	24%	32% B	24%
Genuine	27%	30% D	30% D	18%	25%	28%	23%	31% D
Adventurous	25%	24%	26%	30%	28%	23%	24%	22%
Original	25%	21%	34% BD	19%	24%	24%	23%	29%

9. Please indicate which accurately describes \_\_\_\_ County.

# SLOC-Descriptors

Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Descriptors (N)</b>	648	122	131	93	68	80	82	72
Artsy	25%	21%	33% BGH	30% GH	24%	24%	18%	17%
Classic	24%	26%	21%	18%	31% D	26%	22%	24%
Environmentally responsible	23%	25%	21%	26%	19%	28%	21%	19%
Excellence	23%	19%	22% F	25% F	29% BF	13%	24% F	31% BF
Unpretentious	20%	30% CDGH	17%	17%	21%	31% CDGH	11%	14%
Stylish	20%	11%	20% B	23% B	25% B	19%	22% B	25% B
Trendy	19%	11%	25% BF	27% BF	18%	11%	23% BF	17%
Reliable	19%	17%	18%	20%	22%	20%	15%	21%
Youthful	17%	18%	18%	26% EFH	13%	14%	17%	10%
Rural	16%	23% DEGH	16%	12%	10%	21% DEGH	11%	11%
Fashionable	14%	11%	14%	18% F	21% BF	9%	17%	11%
Sophisticated	13%	7%	17% BF	15% BF	21% BFH	6%	20% BFH	10%
Innovative	12%	12%	12%	9%	13%	14%	12%	14%
Contemporary	12%	7%	10%	14%	18% B	10%	13%	14%
Rugged	8%	11% D	11% D	4%	4%	11% D	7%	4%
Snobbish	3%	0%	4% B	2%	6% B	4% B	5% B	1%

9. Please indicate which accurately describes \_\_\_\_ County.

# San Luis Obispo County-Location

- Below is the map of California shown to respondents:



10. Please indicate below what region you believe San Luis Obispo County is located.

# San Luis Obispo County-Location

- **About two-in-three knew SLOC is located in the Central Coast of CA**
  - This understanding was highest in Central Valley and SF and lowest in Las Vegas (where more thought it was in Central Valley or LA)

Base: Past Visitors	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Perceived Location (N)</b>	648	122	131	93	68	80	82	72
Central Coast	65%	77% CEF GH	63%	78% CEF GH	57%	58%	52%	56%
Central Valley	9%	6%	11%	6%	4%	11%	17% BDE	10%
Los Angeles	7%	2%	10% BFH	8% B	10% BFH	3%	15% BFH	3%
San Diego	4%	2%	4%	1%	6% D	11% BCD GH	1%	3%
San Francisco Bay Area	4%	5% E	2%	1%	0%	4%	6% DE	7% DE
Orange County	2%	1%	2%	1%	4% B	6% BCD	2%	1%
Gold Country	2%	3% G	2%	2%	3%	0%	0%	4% FG
High Sierra	2%	2%	2%	1%	3%	0%	1%	6% DF
North Coast	2%	1%	0%	0%	4% BCD	5% BCD	1%	4% CD
Deserts	1%	0%	2% B	0%	0%	0%	1%	1%
Inland Empire	<1%	0%	0%	0%	3% BCD	0%	0%	1%
Shasta Cascade	<1%	0%	1%	0%	3% BD	0%	0%	0%
Unsure	2%	2%	2%	1%	1%	3%	2%	4%

10. Please indicate below what region you believe San Luis Obispo County is located.

# SLOC-Central Coast Location

- About six in ten who placed SLOC in Central Coast consider it being located midway between SF and LA
- One in four consider it lying between Carmel-by-the-Sea and Hearst Castle

Base: Past Visitors Who Think San Luis Obispo is in Central Coast	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Location w/in Central Coast (N)</b>	418	94	83	73	39*	46	43	40
Roughly halfway between San Francisco and Los Angeles	56%	63%	51%	63%	51%	57%	49%	55%
The 90 mile-long stretch along the coast between Carmel-by-the-Sea and Hearst Castle	28%	23%	25%	26%	36%	30%	35%	25%
Santa Barbara	5%	3%	11% BD	0%	3%	7% D	9% D	5% D
The Monterey Peninsula	4%	5%	2%	3%	3%	0%	5%	8% F
Salinas Valley	2%	0%	4% B	0%	3%	2%	0%	5% BD
The Channel Islands	0%	0%	0%	0%	3%	0%	0%	0%
Other	3%	3%	4%	4%	0%	4%	0%	0%
Unsure	3%	2%	4%	4%	3%	0%	2%	3%

10a. Where specifically in the Central Coast do you think it is located? Caution: Small base size.

# Prospective Visitors

# Prospective Visitor Summary

---

- **When is the visit planned:**
  - May through September is the prime visiting period (56% of visitors) with July and August the peak (25% of visitors)
  - Central Valley visitors come a bit earlier (May-July), Seattle and Las Vegas visitors index the highest in the winter months and San Francisco visitors index highest in October. Clearly, local weather plays a role in visitation.

# When Is Next Visit to SLOC

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
<b>When Visit Planned</b>								
March '16	1%	3% C	0%	0%	0%	0%	1%	0%
April '16	5%	5%	5%	7%	4%	1%	6%	8% F
May '16	10%	11%	9%	16% F	7%	4%	12% F	10%
June '16	12%	9%	16% H	23% BFH	13%	8%	12%	6%
July '16	13%	11%	12%	21% BG	11%	14%	9%	14%
August '16	10%	13%	13%	7%	7%	8%	7%	6%
September '16	11%	9% D	12% D	2%	11% D	10% D	13% D	18% BD
October '16	6%	12% CDFGH	3%	2%	9% CD	4%	4%	5%
November '16	4%	3%	3%	4%	5%	3%	4%	3%
December '16	2%	3% C	0%	2%	1%	0%	3% C	3% C
January '17	1%	0%	3% B	2%	0%	1%	1%	3% B
February '17	1%	1%	0%	0%	4% C	1%	3% C	1%
March '17	3%	2%	1%	2%	4%	7% BCG	0%	4%

12. When are you planning your next leisure/vacation trip to San Luis Obispo County that includes an overnight stay?



# When Is Next Visit to SLOC

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
<b>When Visit Planned</b>								
April '17	3%	2%	3%	2%	2%	8% BG	1%	3%
May '17	3%	1%	2%	2%	4%	6% B	3%	4%
June '17	3%	2%	3%	0%	5% D	7% BD	3%	4%
July '17	3%	2%	2%	0%	6% CDH	3%	4% H	0%
August '17	0%	0%	0%	0%	0%	0%	1%	0%
September '17	1%	1%	1%	0%	1%	3%	3%	1%
October '17	1%	1%	1%	0%	1%	0%	1%	1%
November '17	0%	0%	0%	2%	0%	0%	0%	1%
December '17	0%	0%	0%	0%	0%	0%	0%	1%
January '18	0%	0%	0%	0%	0%	0%	0%	0%
February '18	0%	0%	0%	0%	0%	0%	0%	0%
March '18	0%	0%	0%	0%	0%	0%	0%	1%
Unsure	8%	10% H	12% EH	9%	5%	11% H	6%	3%

12. When are you planning your next leisure/vacation trip to San Luis Obispo County that includes an overnight stay?

# Reasons for Visit

- **Reasons for visit:**

- The primary motivator to prospective visitors are the weather (especially Seattle) and the beach (especially Central Valley and Phoenix)
- Dining and wine tasting (especially Los Angeles) are also important drivers
- Other drivers that stand out by market include:
  - Los Angeles: Easy to get to
  - Central Valley: Easy to get to
  - San Diego: Easy to get to, Proximity
  - Las Vegas: Proximity
  - Seattle: Visiting family/friends

- **Market differences observed for:**

- Beach (especially Central Valley and Phoenix)
- Exciting place to visit (especially Las Vegas)
- Wine tasting (especially San Francisco and San Diego)
- Dining and restaurants stand out among Central Valley visitors

# Reasons for Visit

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
<b>Reasons for Visit</b>								
The weather	47%	43%	49% F	40%	51% F	36%	47%	62% BCDGF
Beach	44%	43%	44%	58% BCFGH	59% BCFGH	35%	35%	35%
Dining/restaurant options	37%	36%	42% E	44% E	29%	40%	37%	32%
Wine Tasting	32%	31%	40% GH	30%	33%	38% H	26%	23%
It's an exciting place to visit	32%	30%	32%	26%	33%	35%	43% BDH	26%
It's accessible/easy to get to	30%	30% EH	38% EH	40% EH	17%	36% EH	29% EH	17%
A good value for the money	29%	32%	27%	26%	24%	29%	37%	28%
Family friendly	28%	25%	27%	32%	39% BCF	22%	28%	27%
It's a high quality experience	27%	20%	29% B	28%	30% B	28%	32% B	28%
Familiar with the area	25%	22%	30%	30%	24%	19%	22%	28%
Geographical proximity	21%	20%	24% EH	25% EH	12%	29% EH	31% BEH	12%
Offers the things that are important to me	18%	14%	21%	19%	18%	14%	18%	24% B
I was visiting another destination that was close by	18%	11%	19% B	16%	18%	17%	25% B	22% B
Offers luxury accommodations	15%	9%	16%	16%	21% BH	17%	16%	10%
Event	12%	11%	10%	18% H	16% H	8%	18% H	5%
Visiting family/friends	2%	1%	1%	0%	5% BCDG	1%	0%	6% BCDG
Something else	5%	7% H	4%	2%	5%	7% H	6%	1%

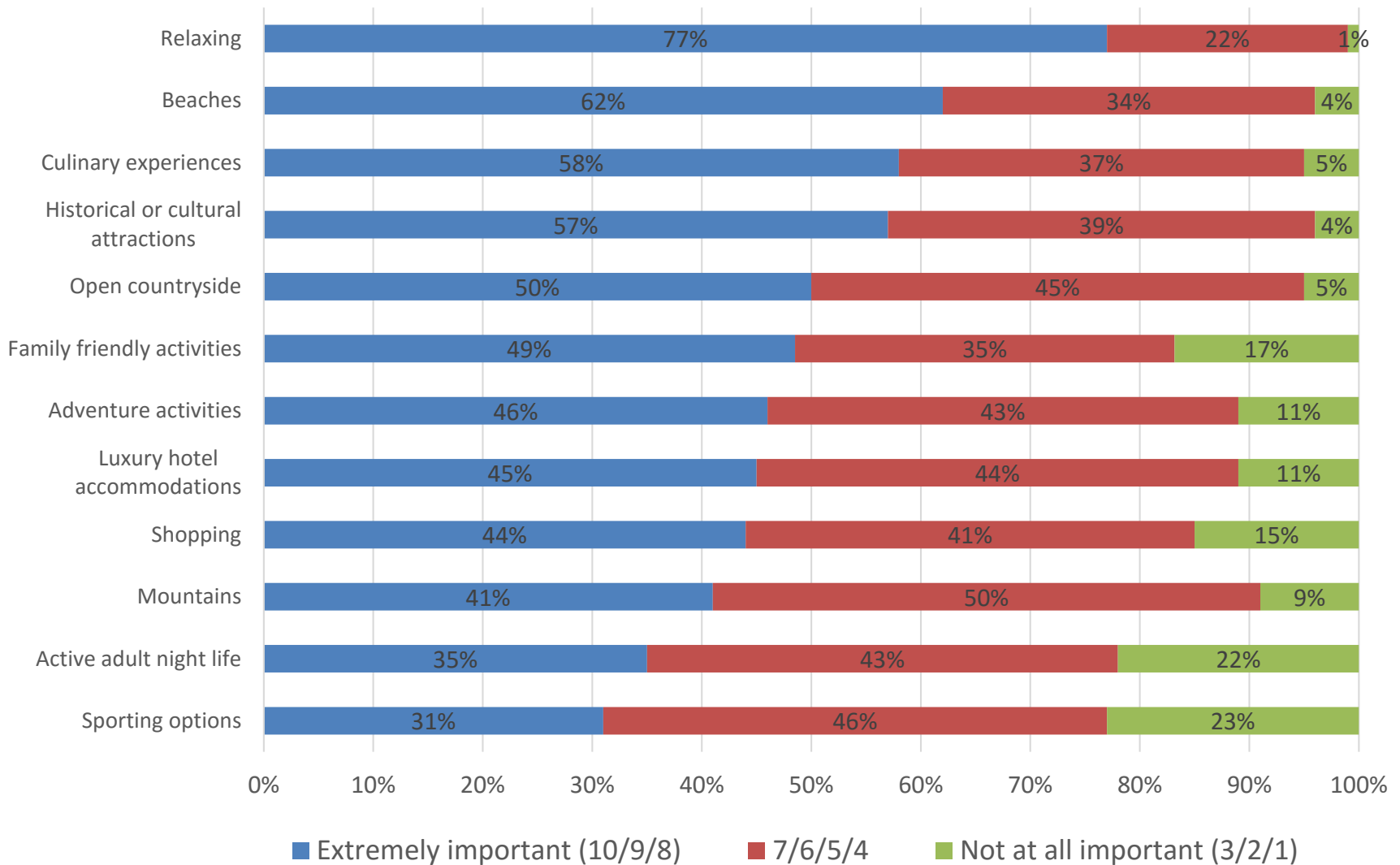


# Leisure/Vacation Factor Importance

---

- **The most important considerations for where to vacation are:**
  - Relaxation
  - Beaches
  - Culinary experiences
  - Historical/cultural attractions
  - Open countryside
- **Having an active night life and sporting events are less important to a majority**
- **Statistical differences (Top 3 Box):**
  - Active adult nightlife and culinary experiences are more important for those from L.A. than 3 other areas (San Fran, Phoenix, San Diego)
  - Open countryside, mountains, and luxury hotel accommodations, sporting options, adventure activities are least important to those in San Diego

# Leisure/Vaca. Destination Factors-Total



15. How important are each of the following in deciding where you are going to visit? Base: n=606

# Prospective Visitors: San Luis Obispo County Evaluation

# San Luis Obispo County as a Destination

---

- **SLOC was rated most positively in terms of:**
  - Relaxing
  - Beaches
  - Open countryside
- **The County received a favorable evaluation in terms of:**
  - Culinary experiences
  - Luxury hotel accommodations
  - Historical or cultural attractions
  - Family friendly activities
  - Shopping
  - Adventure activities
- **SLOC was rated weakest in terms of:**
  - Mountains
  - Sporting options
  - Active adult night life

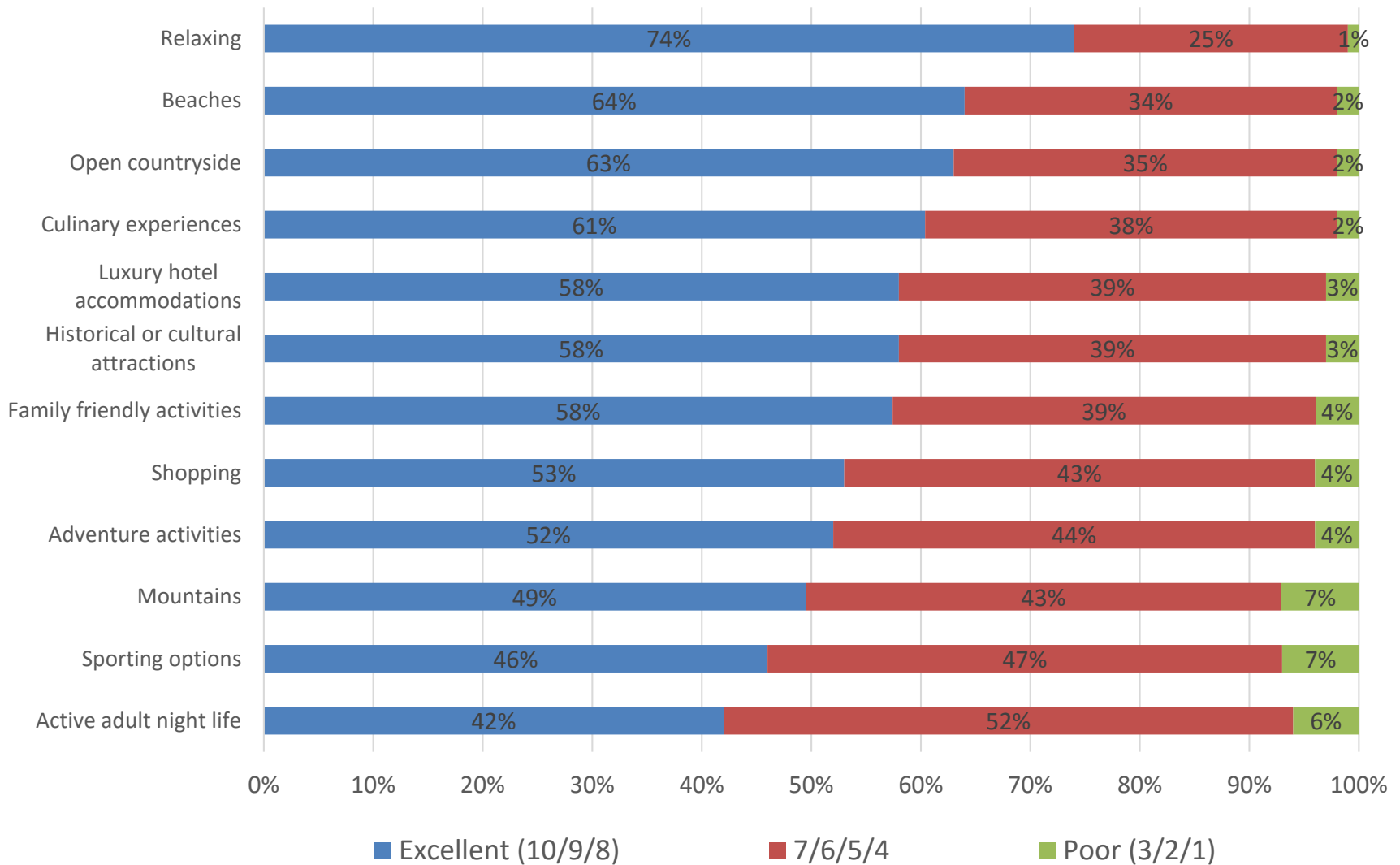
# San Luis Obispo County as a Destination

---

- **SLOC was rated least positively by SF visitors compared to visitors from elsewhere especially in terms of:**
  - Culinary experiences
  - Luxury hotel accommodations
  - Family friendly activities
  - Active adult night life
- **In contrast, SF visitors rated SLOC slightly more positively in terms of open countryside compared to visitors from elsewhere**



# San Luis Obispo County Ratings-Total



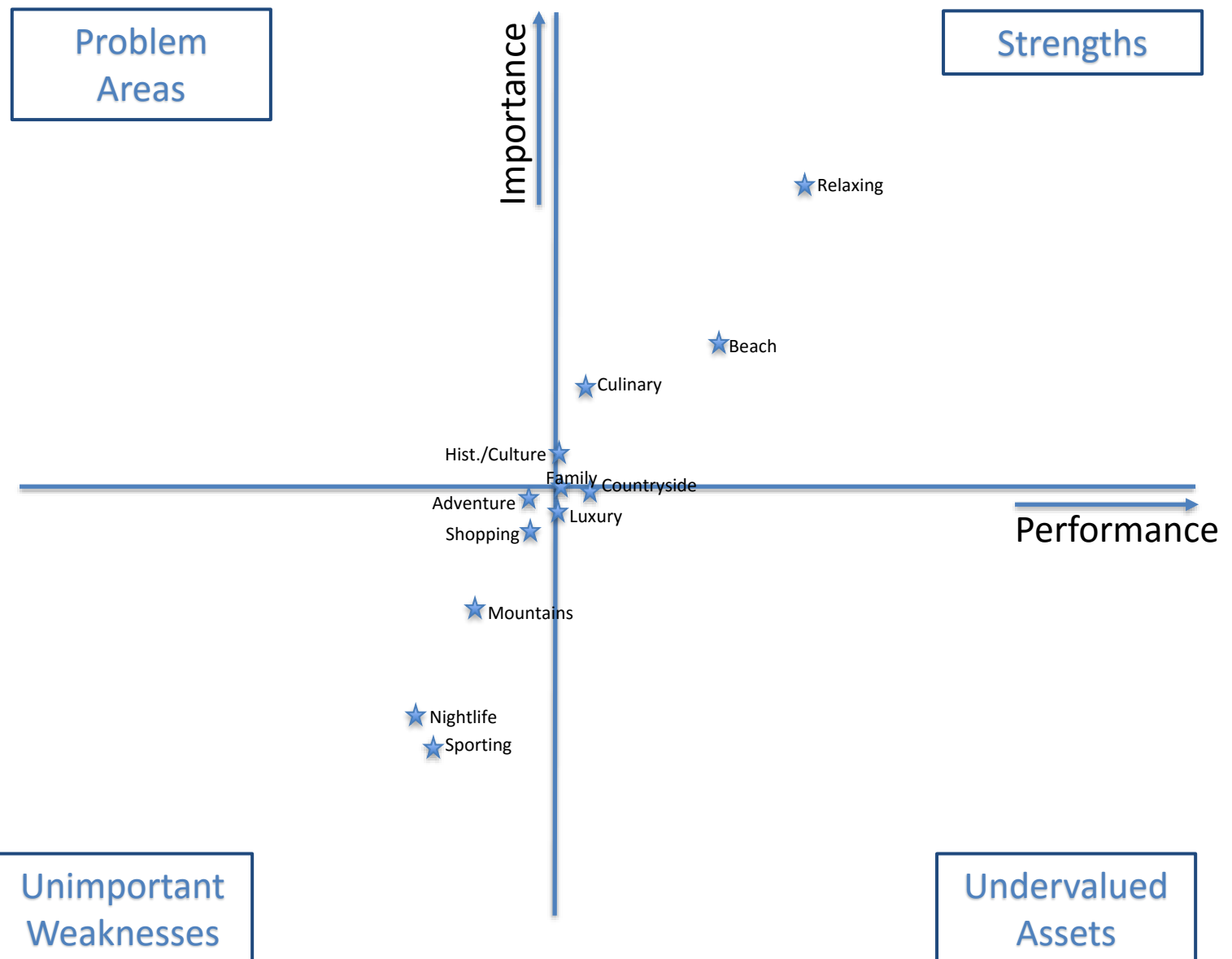
16. Please indicate how well do you think \_\_\_\_ County delivers on each of these factors. Base: n=606

# SLOC: Performance/Importance

---

- **As shown on the following page, SLOC is performing well on the factors that matter most to likely visitors. This is not surprising as this reflects the attitudes of those planning to visit SLOC.**
- **Areas of strength, that should continue to be reinforced, include:**
  - Relaxation
  - Beaches
  - Culinary experiences
- **Areas of weakness, that would benefit from being addressed, include:**
  - Historical or cultural attractions
  - Adventure activities
  - Shopping

# SLOC: (Performance/Importance)



# SLOC: Gap Analysis by DMA

- **Enhancing perceptions of SLOC in the following areas is warranted:**
  - Relaxing
  - Culinary experiences
  - Beaches
  - Historical or cultural attractions
- **The following are areas where perceptions of SLOC do not need to be enhanced from the perspective of prospective visitors:**
  - Sporting options
  - Luxury hotel accommodations
  - Active adult night life
- **Comparing the ratings of SLOC on various attributes to the perceived importance of each factor we see:**
  - Central Valley and Phoenix most apt to see SLOC in a favorable light
  - Las Vegas, LA and SF least apt to SLOC in a favorable light
- **In total, SLOC is most apt to come up short (across markets) in terms of:**
  - Relaxing
  - Adventure activities
  - Historical or cultural attractions

# SLOC: Gap Analysis by DMA

Base: Prospective Visitors (Top 3 Box Performance minus Top 3 Box Importance)	TOTAL (a)	San Francisco (b)	Los Angeles (c)	Central Valley (d)	Phoenix (e)	San Diego (f)	Las Vegas (g)	Seattle (h)
<b>Attribute (N)</b>	<b>606</b>	<b>130</b>	<b>119</b>	<b>57</b>	<b>82</b>	<b>72</b>	<b>68</b>	<b>78</b>
Beaches	2%	2%	-3%	9%	15%	7%	-6%	-9%
Active adult night life	7%	6%	2%	19%	6%	7%	10%	5%
Open countryside	12%	15%	13%	14%	12%	15%	4%	10%
Mountains	8%	10%	3%	16%	7%	15%	-3%	10%
Luxury hotel accommodations	12%	12%	8%	7%	18%	17%	13%	13%
Shopping	9%	8%	5%	12%	6%	13%	10%	15%
Historical or cultural attractions	1%	0%	-3%	7%	-2%	1%	4%	4%
Family friendly activities	9%	10%	9%	11%	10%	10%	7%	5%
Sporting options	15%	12%	15%	14%	21%	18%	13%	12%
Relaxing	-3%	-7%	-8%	-5%	0%	3%	3%	-1%
Adventure activities	5%	3%	5%	5%	12%	6%	0%	8%
Culinary experiences	2%	-4%	-8%	16%	6%	4%	7%	9%



=Negative



=Neutral



=Positive



# San Luis Obispo County-Overall Opinion

- **Few consider SLOC as their very favorite leisure destination**
  - However, those in Central Valley and Las Vegas are more apt to do so than others
- **Most are equally divided between considering SLOC among their favorite leisure destination versus seeing it behind other destinations as a favorite**
  - San Diego residents are the least positive

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
<b>Overall Opinion</b>								
It's almost always the first place I consider for a leisure trip	15%	12% E	18% EF	30% BCEFH	5%	6%	25% BEFH	13% E
It's one of my favorite places I consider to visit along with others	43%	43%	36%	39%	55% BCDF	40%	43%	46%
It's a place I consider visiting, but there are others I would consider before this one	42%	45% DG	46% DG	32%	40%	54% DEG	32%	41%

17. Which statement best describes your overall opinion of \_\_\_\_\_?

# San Luis Obispo County: Descriptors

---

- **The best descriptors of SLOC are:**
  - Relaxed (especially LA)
  - Scenic (especially SD and LA and Phoenix)
- **Other good descriptors include:**
  - Friendly
  - Fun
  - Casual
- **Very few consider SLOC to be:**
  - Innovative
  - Rugged
  - Snobbish
- **Market differences include (where market indexes high):**
  - San Diego: Historic
  - Central Valley: Unique
  - LA: Environmentally sensitive
  - Phoenix: Sophisticated, Fashionable, Stylish

# San Luis Obispo County-Descriptors

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
<b>Descriptors</b>								
Relaxed	55%	52%	64% BDG	47%	62% DG	57%	47%	53%
Scenic	52%	52% G	61% GH	47%	59% GH	64% BDGH	37%	42%
Friendly	44%	48%	41%	47%	46%	43%	38%	40%
Fun	40%	39%	42%	46%	45%	38%	34%	33%
Casual	37%	42% H	43% H	32%	39%	35%	32%	29%
Down to earth	33%	35%	37% G	30%	32%	38%	25%	27%
Historic	33%	32% G	34% G	33%	38% GH	44% BGH	21%	24%
Authentic	30%	33%	24%	26%	26%	28%	37% C	36% C
Tasteful	28%	22%	32% B	23%	34% B	28%	32% B	28%
Genuine	27%	25%	31% H	30% H	32% H	22%	34% H	15%
Quality	27%	25%	21%	28%	27%	32% C	32% C	27%
Quiet	26%	28%	29%	19%	28%	26%	22%	22%
Unique	25%	22%	27%	35% BFG	27%	18%	21%	26%
Exciting	23%	16%	24%	32% B	30% B	22%	22%	21%
Environmentally responsible	22%	19%	30% BGH	23%	23%	25%	19%	15%
Classic	21%	15%	22%	23%	17%	29% BE	26% B	21%

18. Please indicate which accurately describes \_\_\_\_ County.



# San Luis Obispo County-Descriptors

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
Descriptors								
Adventurous	21%	18%	24% F	14%	29% BDF	10%	22% F	24% F
Artsy	21%	19%	20%	23%	22%	22%	18%	22%
Original	19%	20%	26% EFH	21%	13%	15%	19%	14%
Unpretentious	17%	18% G	20% G	11%	20% G	24% DG	9%	18%
Excellence	17%	19% F	13%	16%	22% F	10%	21% F	14%
Reliable	16%	15%	18%	19%	13%	17%	21% H	10%
Stylish	16%	8%	19% B	21% B	26% BF	13%	15%	15% B
Trendy	15%	9%	13%	19% B	22% BC	15%	24% BCH	13%
Contemporary	14%	16%	18%	16%	13%	13%	9%	13%
Youthful	14%	14%	14%	19%	11%	14%	12%	13%
Rural	13%	15%	12%	12%	18% H	15%	13%	8%
Sophisticated	13%	5%	11%	16% B	27% BCFGH	15% B	15% B	8%
Fashionable	12%	9%	9%	11%	23% BCDFH	13%	15%	6%
Innovative	8%	8%	8%	9%	5%	10%	12%	6%
Rugged	5%	4%	4%	7%	7%	6%	4%	6%
Snobbish	3%	4%	1%	2%	6% C	4%	1%	4%
None of these	1%	1%	2%	0%	0%	1%	1%	0%

18. Please indicate which accurately describes \_\_\_\_ County.

# San Luis Obispo County-Location

- Below is the map of California shown to respondents:



19. Please indicate below what region you believe San Luis Obispo County is located.

# San Luis Obispo County-Location

- **About two-in-three knew SLOC is located in the Central Coast of CA**
  - This understanding was highest in SF and San Diego and lowest in Las Vegas
- **About one in ten thought it was located in Central Valley (highest in Central Valley)**

Base: Prospective Visitors	TOTAL N=606 (a)	San Francisco N=130 (b)	Los Angeles N=119 (c)	Central Valley N=57 (d)	Phoenix N=82 (e)	San Diego N=72 (f)	Las Vegas N=68 (g)	Seattle N=78 (h)
<b>Location</b>								
Central Coast	64%	71% DGH	67% G	56%	62%	72% DGH	50%	59%
Central Valley	9%	4%	9% B	18% BEFG	7%	7%	7%	13% B
Los Angeles	6%	4%	3%	4%	7%	8% C	12% BCD	10% BC
San Francisco Bay Area	4%	8% DEH	4%	0%	1%	6% D	3%	1%
North Coast	4%	1%	3%	7% B	9% BCF	1%	6% B	3%
San Diego	3%	2%	4% F	2%	4%	0%	7% BFH	1%
Orange County	2%	0%	3% B	2%	4% B	3% B	6% B	3% B
Gold Country	2%	2%	3%	9% BCEFGH	1%	0%	1%	1%
High Sierra	2%	2%	3%	0%	4%	1%	1%	3%
Deserts	1%	1%	1%	2%	0%	1%	4% BEH	0%
Inland Empire	1%	2%	1%	0%	1%	0%	0%	1%
Shasta Cascade	0%	0%	1%	0%	0%	0%	0%	3% B
Unsure	2%	5% CEF	0%	2%	0%	0%	1%	3% C

19. Please indicate below what region you believe San Luis Obispo County is located.

# SLOC-Central Coast Location

- **About six in ten who placed SLOC in the Central Coast consider it being located midway between SF and LA (highest in SD and lowest in Phoenix)**
  - One in five consider it lying between Carmel-by-the-Sea and Hearst Castle

Base: Prospective Visitors Who Think San Luis Obispo is in Central Coast	TOTAL N=387 (a)	San Francisco N=92 (b)	Los Angeles N=80 (c)	Central Valley N=32* (d)	Phoenix N=51 (e)	San Diego N=52 (f)	Las Vegas N=34* (g)	Seattle N=46 (h)
<b>Location w/in Central Coast</b>								
Roughly halfway between San Francisco and Los Angeles	57%	62%	53%	50%	51%	67% CE	59%	52%
The 90 mile-long stretch along the coast between Carmel-by-the-Sea and Hearst Castle	22%	23%	28%	22%	18%	17%	21%	22%
Santa Barbara	6%	8%	5%	3%	8%	8%	6%	7%
The Monterey Peninsula	3%	2%	4%	6% H	6% H	2%	6%	0%
Salinas Valley	2%	1%	4%	0%	0%	2%	6% E	2%
The Channel Islands	2%	0%	3%	6% BEF	0%	0%	0%	4% B
Other	2%	1%	1%	6% F	6% BF	0%	0%	4%
Unsure	5%	3%	4%	6%	12% BC	4%	3%	9%

19a. Where specifically in the Central Coast do you think it is located?.

# Summary of DMA Differences

# San Francisco and Los Angeles: Visitors

## San Francisco

### More Likely...

Aware of SLOC

P12M visitation to Napa, Monterey and Sonoma

Above average travel spending P12M\*

To visit SLOC during low season

To accurately locate SLOC on a map

To describe SLOC as Unpretentious and Rural

## Los Angeles

### More Likely...

Aware of SLOC

P12M visitation to Santa Barbara

Above average travel spending P12M\*

To visit SLOC during low season

To describe SLOC as Relaxed, Quiet and Artsy

\*P12M=PAST 12 MONTHS

# Central Valley: Visitors

## Central Valley

### More Likely...

Past vs. Potential Visitor

Aware of SLOC

P12M\* visitation to SLOC and Monterey

Next 24 mos. visitation to SLOC

Below average travel spending P12M\*

To have made more visits to SLOC P12M\*

To visit SLOC during low season

To travel with children

To have spent less last trip to SLOC

## Central Valley

### Also More Likely...

To visit SLOC for the beaches and weather

To consider SLOC their very favorite destination

To accurately locate SLOC on a map

To describe SLOC as Fun, Casual, and Youthful

\*P12M=PAST 12 MONTHS

# Phoenix and San Diego: Visitors

## Phoenix

### More Likely...

Below average travel spending P12M\*

To visit SLOC during high season

To visit SLOC for the weather

To describe SLOC as Scenic, Authentic and Sophisticated

## Phoenix

### Less Likely...

Aware of SLOC

## San Diego

### More Likely...

Aware of SLOC

Spent less last trip to SLOC

To describe SLOC as Scenic, Unpretentious, and Rural

## San Diego

### Less Likely...

Next 24 mos. visitation to SLOC

\*P12M=PAST 12 MONTHS



# Las Vegas and Seattle: Visitors

## Las Vegas

### More Likely:

Next 24 mos. visitation to SLOC

Above average travel spending P12M\*

Spent more last trip to SLOC

To describe SLOC as Sophisticated

## Las Vegas

### Less Likely:

Aware of SLOC

## Seattle

### More Likely:

Above average travel spending P12M\*

To visit SLOC during high season

Spent more last trip to SLOC

To visit SLOC for the weather

To describe SLOC as Excellence

## Seattle

### Less Likely:

Aware of SLOC

To locate SLOC on a map

\*P12M=PAST 12 MONTHS

# San Francisco and Los Angeles: Prospects

---

## San Francisco

### More Likely...

To visit SLOC in October

## Los Angeles

### More Likely...

To visit SLOC for wine tasting and because it's easy to get to

To decide on a leisure/vacation destination based on the culinary experiences available and the location having an active adult nightlife

To describe SLOC as Relaxed and Original

# Central Valley: Prospects

---

## Central Valley

### More Likely...

To visit SLOC between May and July

To visit SLOC for the beaches and because it's easy to get to

Credit SLOC's dining/restaurant options as the primary reason for visiting

To credit SLOC with having an active adult nightlife

To consider SLOC their very favorite destination

To think SLOC is in Gold Country or Central Valley

# Phoenix and San Diego: Prospects

---

## Phoenix

### More Likely...

To visit SLOC for the beach

To describe SLOC as Adventurous,  
Fashionable, and Sophisticated

## San Diego

### More Likely...

To visit SLOC because of its geographical  
proximity and being easy to get to

To describe SLOC as Scenic and Historic

## San Diego

### Less Likely...

To pick a vacation destination for open  
countryside, luxury hotel  
accommodations, mountains, sporting  
events, or adventure activities

# Las Vegas and Seattle: Prospects

## Las Vegas

### More Likely:

To visit SLOC in the winter months

To consider SLOC b/c of its geographical proximity

To rate SLOC as an exciting place to visit

To consider SLOC first for a leisure trip

To describe SLOC as Trendy

## Las Vegas

### Less Likely:

To locate SLOC on a map

## Seattle

### More Likely:

To visit SLOC in the winter

To visit SLOC for the weather

To primarily visit SLOC to see family/friends