

PROJECT 2: FEEDER MARKET AWARENESS STUDY

Objective: Understand if residents in regional markets have an awareness of San Luis Obispo County (SLOC) as a destination, and thoughts and attitudes related to why people would or would not visit.

Regional Designated Marketing Areas (DMAs):

San Francisco • Central Valley • Los Angeles • San Diego • Phoenix • Las Vegas • Seattle

Total Respondents: 1254

Awareness of San Luis Obispo County (SLOC)

Overall awareness of SLOC: 70%

- Highest in LA (78%), Central Valley 76%) and SF (75%)
- Lowest in Phoenix (64%), Las Vegas (61%) and Seattle (56%)
- Against competitive counties, awareness for Santa Barbara was highest (82% overall) followed by Monterey (76%), Napa (75%) and Sonoma (69%)

Community Awareness Overall is **highest** for:

- HWY 1 (82%)
- City of SLO (77%) (especially in LA and SD)
- Pismo/Shell Beach (71%)
- Cal Poly SLO Campus (68%)
- Morro Bay (62%) Paso Robles (61%)
- San Simeon (Hearst Castle)/Cambria/Cayucos (60%)
- Arroyo Grande/Grover Beach/Oceano (41%)
- Atascadero/Templeton (39%)
- Avila Beach (38%)
- Edna Valley (22%)

Lack of San Luis Obispo County (SLOC) Awareness

Community awareness is **lowest** for:

- HWY 1 (Las Vegas (71%))
- City of SLO (Phoenix (73%), Seattle (66%) and Las Vegas (61%))
- Pismo/Shell Beach (Phoenix (65%), Las Vegas (58%) and Seattle (53%))
- Cal Poly SLO Campus (Seattle (59%) and Las Vegas (53%))
- Morro Bay (Phoenix (49%), Las Vegas (42%) and Seattle (42%))
- Paso Robles (Phoenix (45%), Las Vegas (39%) and Seattle (39%))
- San Simeon (Hearst Castle)/Cambria/Cayucos (Phoenix (53%), Seattle (43%) and Las Vegas (36%))
- Arroyo Grande/Grover Beach/Oceano (Las Vegas (37%), San Diego (35%), Phoenix (31%) and Seattle (24%))
- Atascadero/Templeton (San Diego (33%), Phoenix (25%), Las Vegas (25%) and Seattle (23%))
- Avila Beach (Phoenix (28%), Las Vegas (28%), San Diego (24%) and Seattle (23%))
- Edna Valley (Seattle (19%) and San Diego (15%))

San Luis Obispo County (SLOC) Geographic Awareness

- **About 2 in 3 Past and Prospective visitors know SLOC is located on the Central Coast.**
 - 6 in 10 accurately place it as half-way between LA and SF
 - 1 in 4 placed it between Carmel-by-the-Sea and Hearst Castle

Awareness by community:

- 70% placed the City of SLO in SLOC
- 45% placed the City of Pismo Beach/Shell Beach in SLOC
- 41% placed the City of Morro Bay in SLOC
- 36% placed the City of Paso Robles in SLOC
- 34% placed San Simeon/Cambria/Cayucos in SLOC
- 27% placed Arroyo Grande/Grover Beach/Oceano in SLOC
- 25% placed Atascadero/Templeton in SLOC
- 16% placed Edna Valley in SLOC
- 18% placed Solvang in SLOC
- 15% placed Big Sur in SLOC
- 14% placed Pebble Beach in SLOC

Current & Future Visitation

- 52% of respondents have visited SLOC in the past 12 months
- Incidence of past/future visitors is highest in Central Valley and lowest in Seattle and Phoenix (based on lack of awareness)
 - SF residents are the “toughest sell”
- **Barriers to Visitation**
 - Other areas are closer (especially SF and Las Vegas)
 - Other areas are easier to get to (especially SF, Central Valley and Las Vegas)
 - Lacks things important to me (especially SF and Central Valley)
 - SF – Not enough to do there/other destinations offer higher quality experience
 - Central Valley – Other destinations offer higher quality experience
 - Expected visitation to SLOC is lowest in San Diego
- #1 reason for not visiting in past 12 months or planning to visit in next 24 months was “lack of familiarity with the area”
- 56% of visits occur between May and September
 - More than half the business occurs in 5 months
- Average spend is \$1800 (33% of annual leisure spend) - **Spend is highest from Seattle and Las Vegas**
- Beaches and weather are the main draws to SLOC.
- Other important drivers to prospective visitors:
 - Dining and wine tasting (especially LA)

Perception of San Luis Obispo County (SLOC)

Areas of weakness/opportunity, that would benefit from being addressed:

- Historical or cultural attractions
- Outdoor and adventure activities
- Shopping

SLOC "Edge": Beaches, Down-to-Earth, Friendly, Casual and Not snobbish

Competitive Counties' "Edge": Luxury Hotel Accommodations, Culinary Experiences

Descriptors:

- Best – Relaxed and Scenic
- Good – Friendly, Fun and Casual
- Additionally – Down to Earth, Historic and Authentic

Prospective Visitors

- 56% of visits occur between May and September (more than half the business occurs in 5 months)

Reasons for Visiting:

- 47% Weather (Seattle (62%), PHX (51%), LA (49%) and Las Vegas (47%))
- 44% Beach (Phoenix (59%) and Central Valley (58%))
- 37% Dining/Restaurant Options (Central Valley (44%) and LA (42%))
- 32% Wine Tasting (LA (40%) and San Diego (38%))
- 29% Good Value for the Money (Las Vegas (37%) and SF (32%))
- 28% Family-Friendly (Phoenix (39%))

Important Considerations:

- Relaxation, Beaches, Culinary experiences, Historical/Cultural Attractions, Open Countryside

Least Important (and rated weakest):

- Active Night Life, Sporting Events, Mountains

Psychographics/Demographics

Age: 67% = 22-49 (33% are 30-39) • 33% = 50-77 (18% are 50-59)

Income: 50% = \$50,000 - \$99,999 • 38% = \$75,000 - \$99,999 • 30% = \$100,000 - \$149,000 • 19% = \$150,000+

Marital Status: 69% Married or living with partner • 22% Single, never been married

Education: 47% College graduate • 25% Post graduate

Employment Status: 81% Employed (73% full-time)

Gender: 50% Male • 50% Female

Ethnicity: 77% White • 13% Asian or Pacific Islander • 4% African American or Black (14% Hispanic)

Orientation: 89% Heterosexual • 7% Gay/Lesbian/Bisexual/Transgender