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 (37%))

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