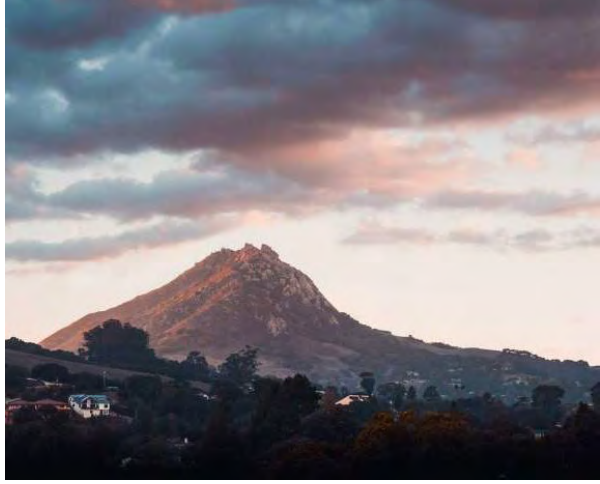
VISIT SLO CAL

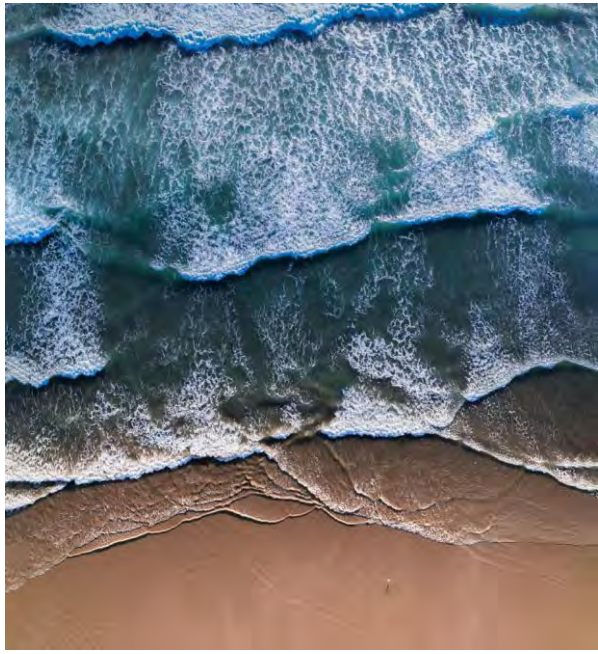
RESIDENT SENTIMENT STUDY

REPORT OF FINDINGS

MAY 2023

Destination Analysts





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RESEARCH OVERVIEW

This report presents the findings from the Visit SLO CAL resident sentiment study conducted by Destination Analysts on behalf of Visit SLO CAL. This study was designed to provide Visit SLO CAL with in-depth insights on San Luis Obispo County residents' current opinions regarding tourism in their communities. The objectives of this research included:

- Assess the current sentiment of residents towards tourism in their communities
- Identify pain points of residents as well as strengths and opportunities
- Provide an expert analysis of tourism sentiment among residents as well as recommendations for future tourism marketing, destination development, and community involvement
- Assess awareness of Visit SLO CAL and understanding of the organization's work to build a vibrant tourism economy
- Contextualize results against state-level metrics for resident sentiment on tourism

RESEARCH METHODOLOGY

Destination Analysts conducted both an online survey and intercept surveys of full-time adult residents of San Luis Obispo County. Full-time students were excluded from the survey.

Respondents must have met the following screening requirements:

- Adults age 18+
- Live in San Luis Obispo County

Online survey responses were collected in partnership with a trusted online panel provider between December 21, 2022 – March 31, 2023. Intercept surveys were collected in San Luis Obispo County from February 23-26, 2023. In total, 2,520 completed surveys were collected, with the data collected and weighted to mirror the population sizes of the 7 cities and the unincorporated area of the county.

The data presented throughout this report is rounded to the first decimal place (e.g., 10.1%). As a result, please note that the sum of values may not add to exactly 100.0 percent due to rounding.

REPORT DEFINITIONS

COMMUNITY SEGMENTS

- **San Luis Obispo** – residents who currently reside in the city of San Luis Obispo
- **Paso Robles** – residents who currently reside in Paso Robles
- **Atascadero** – residents who currently reside in Atascadero
- **Arroyo Grande** – residents who currently reside in Arroyo Grande
- **Grover Beach** – residents who currently reside in Grover Beach
- **Morro Bay** – residents who currently reside in Morro Bay
- **Pismo Beach** – residents who currently reside in Pismo Beach
- **Cambria** – residents who currently reside in Cambria
- **Avila Beach** – residents who currently reside in Avila Beach
- **Unincorporated Area** – residents who currently reside in the unincorporated area of the county, *excluding Cambria and Avila Beach residents*

INDUSTRY SEGMENTS

- **Current Employees** – residents who are currently employed by or own a business that serves San Luis Obispo County's tourism industry
- **Past Employees** – residents who have previously been employed by a business that serves San Luis Obispo County's tourism industry, but no longer work for such a company
- **Non-Employees** – residents who are not currently and have never been employed by a business that serves San Luis Obispo County's tourism industry
- **DMO Aware** – residents who have heard of Visit SLO CAL prior to taking the survey
- **DMO Unaware** – residents who had not heard of Visit SLO CAL prior to taking the survey

DEMOGRAPHIC SEGMENTS

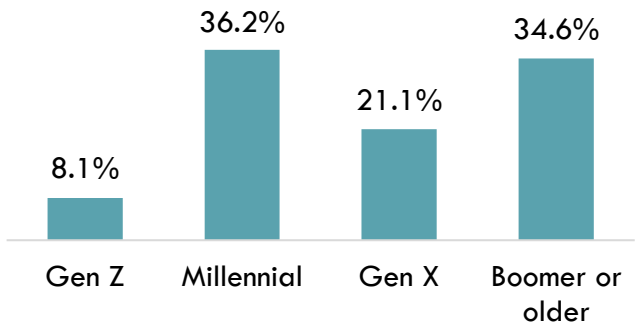
- **Gen Z** – residents who are 18-26 years of age
- **Millennials** – residents who are 27-42 years of age
- **Gen X** – residents who are 43-57 years of age
- **Boomer+** - residents who are over the age of 58
- **White** – residents who self-identify as white/Caucasian
- **Hispanic** – residents who self-identify as Hispanic/Latino
- **Any POC** – residents who self-identify as any ethnicity besides white/Caucasian
- **Transplants** – residents who moved to San Luis Obispo County from elsewhere
- **SLO CAL Natives** – residents who have lived in San Luis Obispo County for their entire life
- **Recent Movers** – residents who have children under 18 living in their household and who moved to San Luis Obispo County within the past 5 years
- **Established Families** – residents who have children under 18 living in their household and who moved to San Luis Obispo County between 6-14 years ago
- **Deep-Rooted Families** – residents who have children under 18 living in their household and who moved to San Luis Obispo County 15 years or more ago.

EXECUTIVE SUMMARY

RESIDENT SENTIMENT — *Resident Profile*

Destination Analysts

RESIDENTS BY GENERATION



ANNUAL HOUSEHOLD INCOME

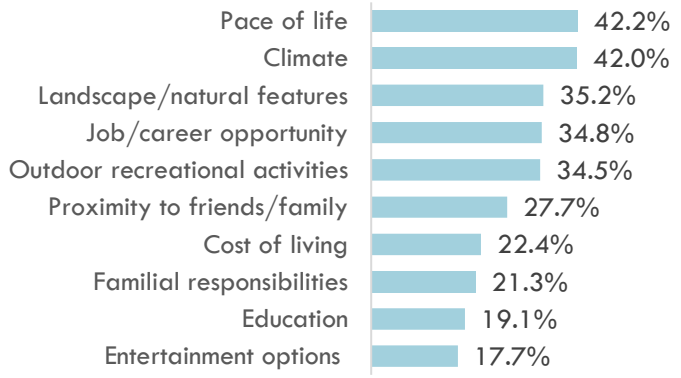
$88,375

CHILDREN IN THE HOUSEHOLD

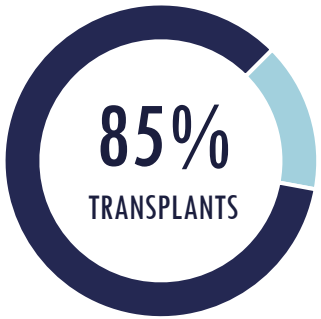
41.1%

TOP 10 REASONS FOR MOVING TO SAN LUIS OBISPO COUNTY

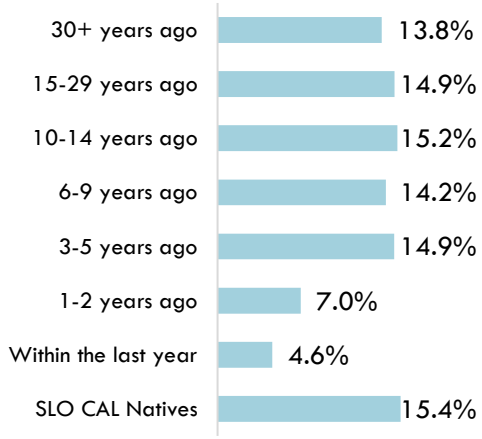
(TOP 2 BOX)



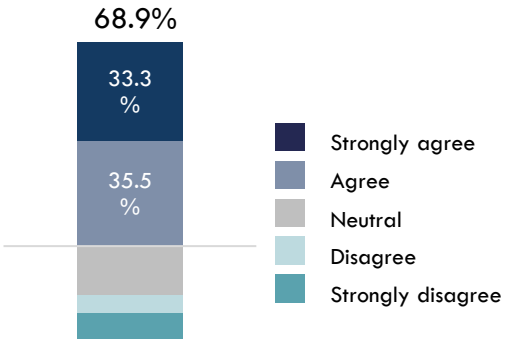
RESIDENT TYPE



LENGTH OF RESIDENCY



RESIDENCY DRIVEN BY PRIOR VISIT



TOP 10 REASONS FOR CONTINUING TO LIVE IN SAN LUIS OBISPO COUNTY

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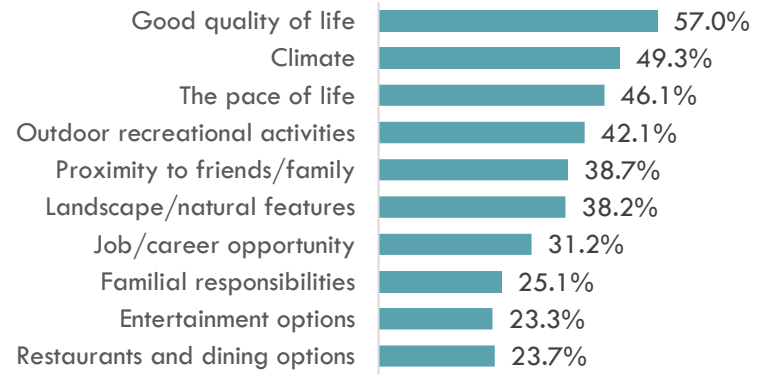

RESIDENT SENTIMENT — *California Comparative Analysis* — Destination Analysts

"TOURISM MAKES MY COMMUNITY A BETTER PLACE TO LIVE"

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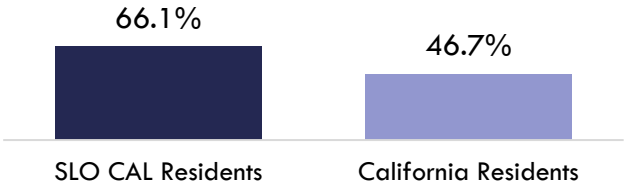

SATISFACTION WITH DIRECTION COMMUNITY IS HEADED

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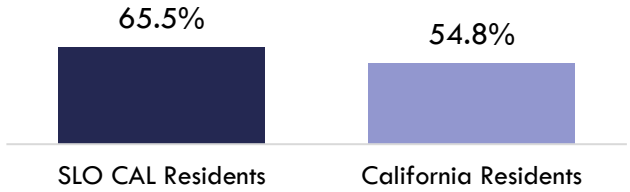

"I MOVED TO MY COMMUNITY BECAUSE I VISITED AND LOVED THE PLACE"

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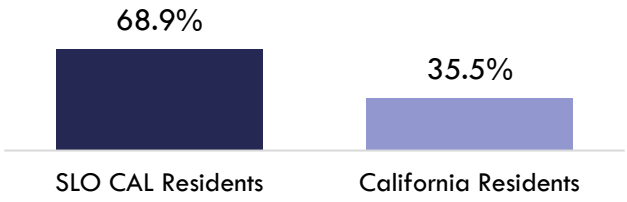

IMPORTANCE OF TOURISM INDUSTRY TO ECONOMIC VITALITY

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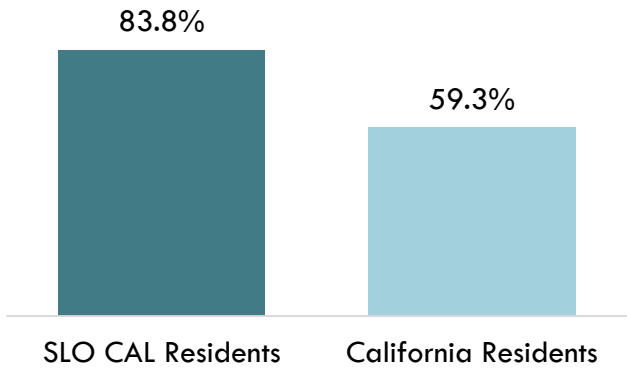

"I HAVE INFLUENCE ON THE DEVELOPMENT/MANAGEMENT OF TOURISM IN MY COMMUNITY"

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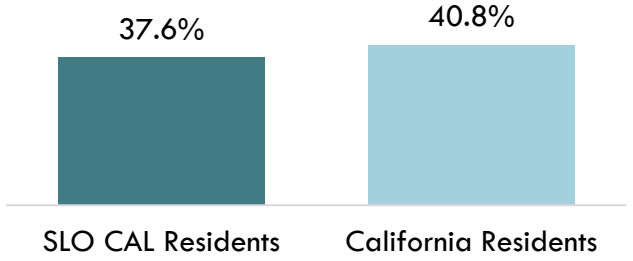

PRIOR AWARENESS OF DMO

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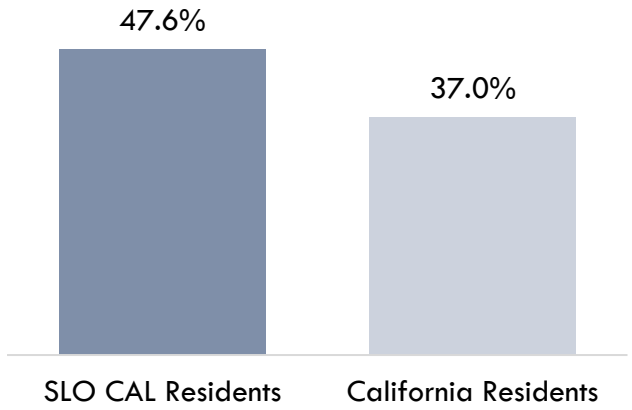

FAMILIARITY WITH DMO'S WORK

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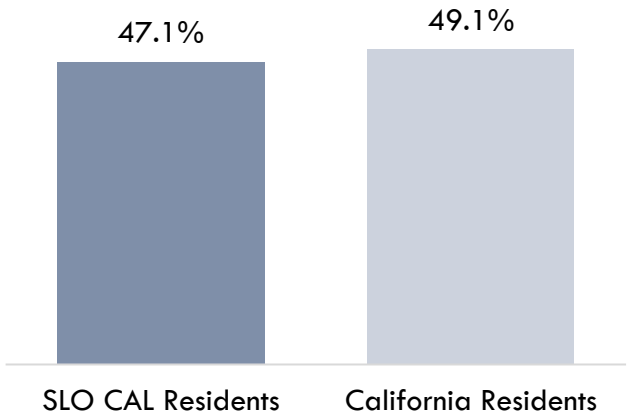


EXECUTIVE SUMMARY

San Luis Obispo County Community Sentiment

Just over half of residents (52.3%) said their personal quality of life has improved compared to one year ago. One-third (33.9%) said their quality of life has not changed, while only 13.9 percent say it has worsened. Among the resident communities, Avila Beach (80.2%) San Luis Obispo (68.3%) had the highest shares of respondents who said their quality of life is somewhat or much better than one year ago. On the other hand, Paso Robles (35.2%) and Unincorporated Area (33.7%) residents – excepting those in Cambria or Avila Beach – had not only significantly lower likelihood to say their quality of life had improved, but they were also more likely to say that their quality of life had worsened in the past year (23.1% of Paso Robles residents, 22.0% of Unincorporated Area residents). Established Families (76.0%), Recent Movers (72.2%), Current Employees (70.0%), and Millennials (68.4%) were significantly more likely to say that their personal quality of life has improved compared to one year ago.

Figure: One-Year Change in Personal Quality of Life

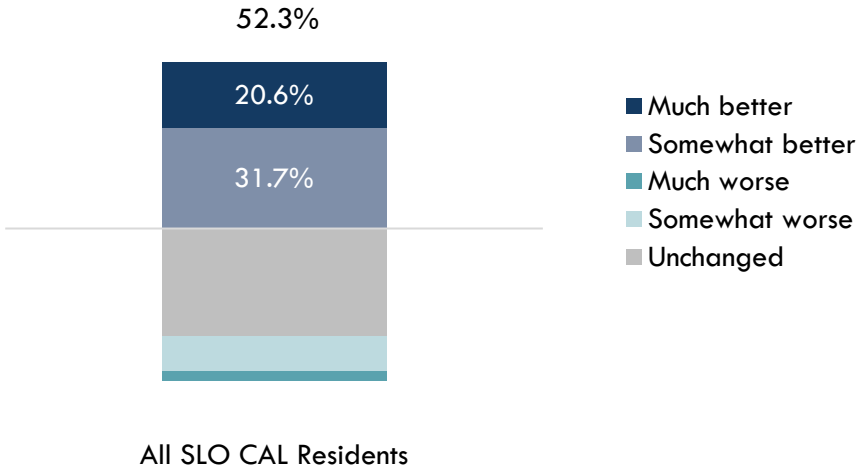
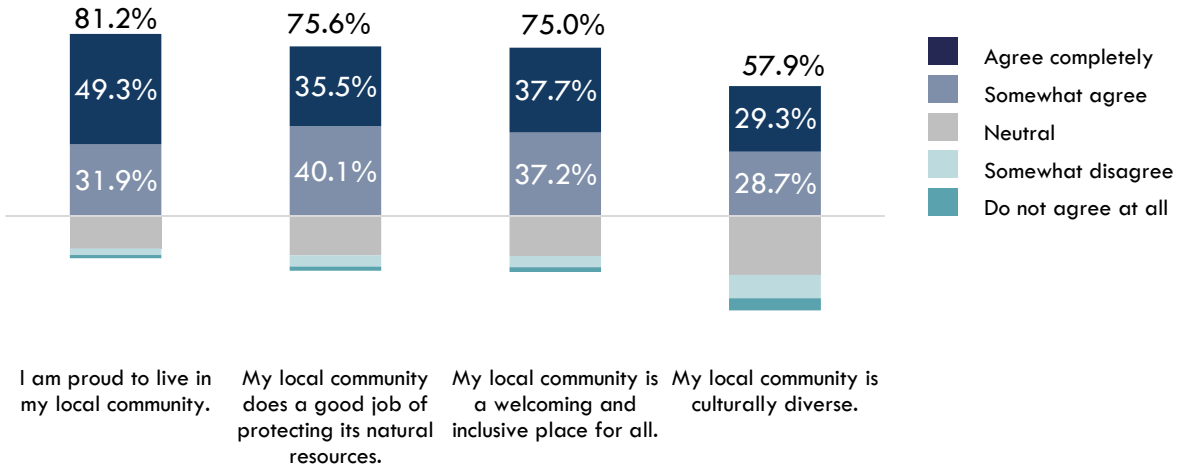


Figure: Community Sentiment Statements



Over eight in ten (81.2%) of San Luis Obispo County residents said they are proud to live in their local community. Three-fourths agreed that their local community protects its natural resources well (75.6%) and is a welcoming and inclusive place (75.0%). Just over half (57.9%) agreed that their local community is culturally diverse. San Luis Obispo residents (84.5%) were most likely to agree that they are proud to live in their community, while Gen Z (69.2%) had the lowest agreement levels. Avila Beach residents (88.9%) had the highest agreement levels around the statement "My local community does a good job of protecting its natural resources", while Paso Robles residents (61.0%) were significantly less likely to agree. In terms of whether they agree that their community is welcoming and inclusive, Avila Beach residents (88.1%) ranked highest in agreement, while Paso Robles residents (63.7%) and Gen Z (62.7%) had the lowest agreement levels. Morro Bay residents (43.1%) and Unincorporated Area residents who do not live in Cambria or Avila Beach (42.8%) were the least likely to agree that their communities are culturally diverse, while Avila Beach (84.6%) and San Luis Obispo (68.0%) residents ranked highest in agreement levels.

EXECUTIVE SUMMARY

San Luis Obispo County Community Sentiment (continued)

A solid majority of residents agreed that San Luis Obispo County is a safe place to live (82.5%) and has a variety of family and kid-friendly activities (73.5%), however agreement levels dropped in terms of the availability of a variety of jobs (51.1%), a variety of available housing for all income levels (45.5%), and affordable cost of living (38.6%). San Luis Obispo and Avila Beach residents had higher agreement levels for all statements, whereas Paso Robles residents were significantly less likely to agree on all points. Millennials, Recent Movers, Established Families, Current Employees, and DMO Aware residents had higher agreement levels around the availability of a variety of jobs and housing, and affordable cost of living.

Figure: Community Assets

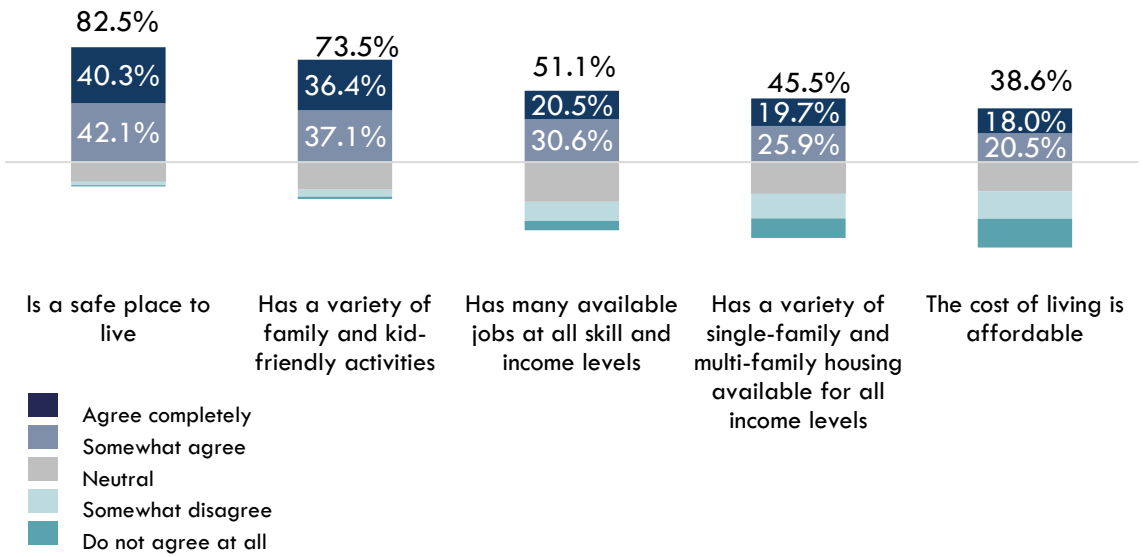
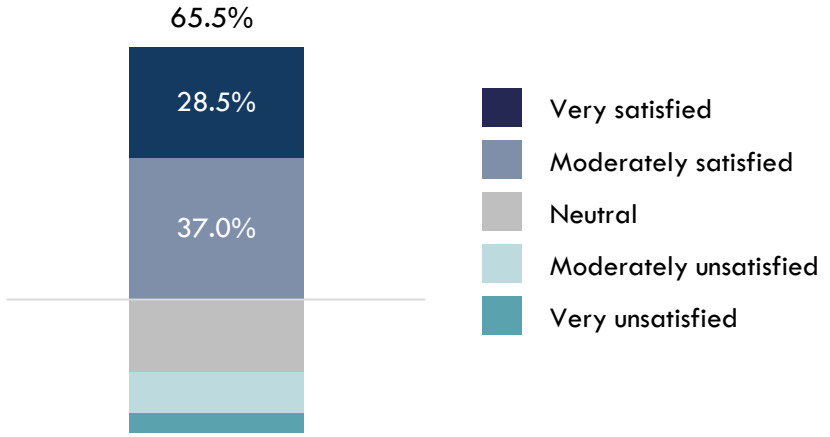


Figure: Satisfaction Levels with the SLO CAL's Direction



All SLO CAL Residents

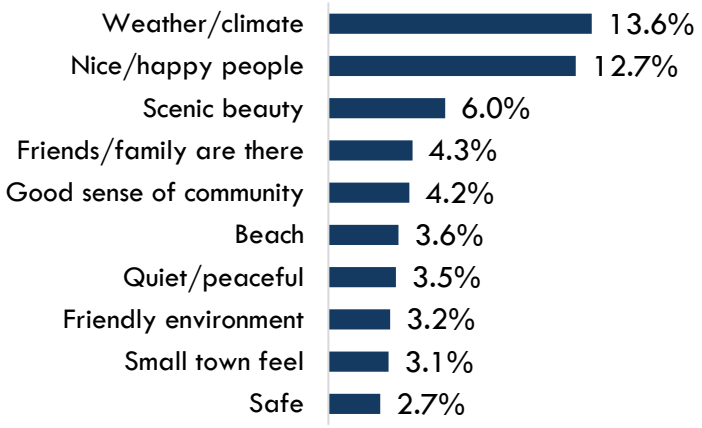
When asked how satisfied they are with the direction San Luis Obispo County is headed, two-thirds (65.5%) of residents said they are moderately or very satisfied. Among the individual resident communities, satisfaction levels were highest among Avila Beach (81.3%) and San Luis Obispo (77.6%) residents. Those who live in Paso Robles (43.8%) or the unincorporated area of the county – excepting Avila Beach and Cambria – (51.6%) reported the lowest satisfaction levels. Among the segments, Established Families (80.2%) and Recent Movers (80.0%) reported the highest satisfaction levels with the county's direction. Notably, in the tourism employment segments, Current Employees (74.1%) had a significantly higher satisfaction level compared to Non-Employees (59.0%). Similarly, residents who are DMO Aware (72.6%) were more likely to be satisfied with the direction the county is headed compared to their DMO Unaware counterparts (60.6%).

EXECUTIVE SUMMARY

San Luis Obispo County Community Sentiment (continued)

The quality of the weather/climate (13.6%) was the top characteristic residents love the most about their community, followed closely by the sense of community and the friendliness of the people (12.7%). Among the segments, Grover Beach (14.7%) and Pismo Beach (11.8%) residents were more likely to cite the beach in their community as one of their favorite aspects about living in their local community. The friendly environment was mentioned more by Recent Movers (7.9%) and Established Families (6.9%)

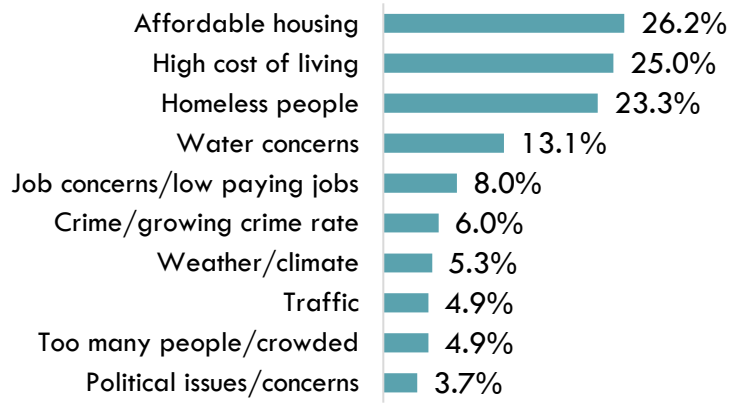
Figure: Top 10 Favorite Aspects of Living in Local Community (unaided)



I love the weather and the peacefulness of the area I live in. I think it's a great area for a family.

There's a lot of people in San Luis Obispo that are very nice and polite. Even when walking in the Downtown area, you're very likely to walk past someone with a smile, and they'll smile back! I've never had a bad experience with anyone when I'm out.

Figure: Top 10 Challenges Facing Local Community (unaided)



Housing is getting more and more expensive every year. I'm afraid I'll eventually have to move to another town because of this. I absolutely love it here, so I'm hoping I can figure something out and stay.

It is getting to the point where this is becoming an unaffordable place to live. The cost of living has skyrocketed, and I think that that has greatly contributed to our homeless population growing to ridiculous amounts.

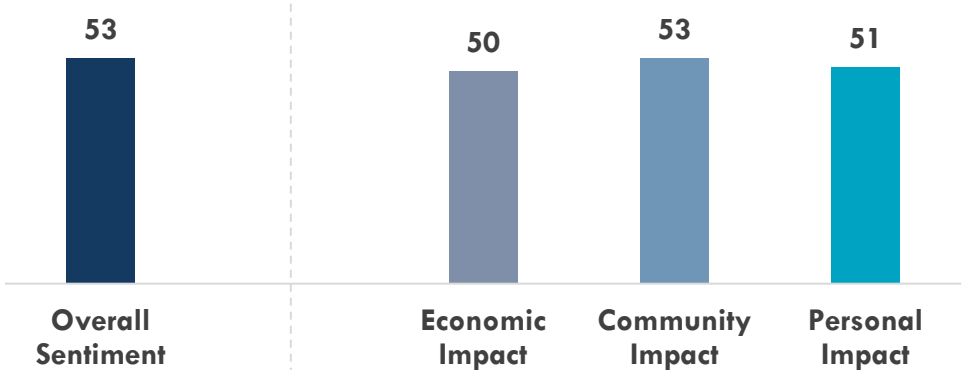
Affordable housing (26.2%) and associated issues such as the cost of living (25.0%), and homelessness (23.3%) rose to the top, and were also tied to concerns about job opportunities (8.0%) that can help support people's cost of living. Affordable housing was of particular concern for Grover Beach residents (42.0%), while Avila Beach residents were more likely to cite the high cost of living (37.2%), and Atascadero residents had the highest share of respondents who mentioned homelessness (33.0%). Residents also voiced concerns about water (13.1%), particularly around supply, possible water shortages, the quality of the water, and conservation efforts. Tourism and tourists was only mentioned by 27 residents. Among those mentions, concerns were mixed; some residents felt that making their county into a tourism destination would make it more unaffordable, while others expressed concerns that there is not enough tourism.

EXECUTIVE SUMMARY

San Luis Obispo County Tourism Sentiment

When considering 21 different statements related to the impact of San Luis Obispo County's tourism industry, overall resident sentiment stands at 53 points on a 100-point scale. Perceptions of community impact were most positive, at 53 points among San Luis Obispo County residents, while personal impact came in at 51 points. Sentiment around the economic impact of San Luis Obispo County's tourism industry ranked slightly lower, at 50 points.

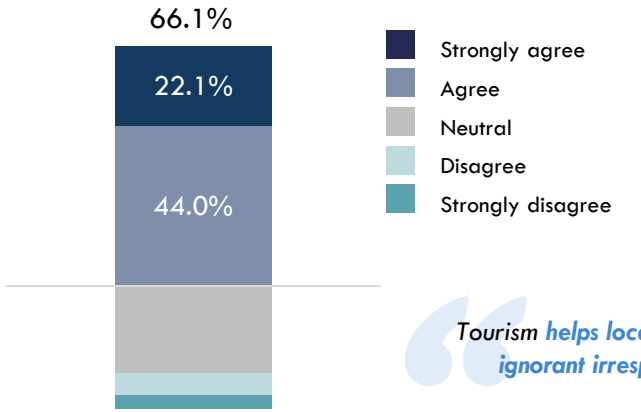
Figure: SLO CAL Tourism Industry Sentiment Index



Two-thirds of residents (66.1%) agreed that tourism in their community makes it a better place to live. Of the community segments, Cambria (80.5%) and San Luis Obispo (76.5%) residents had the highest agreement levels, while Paso Robles (51.1%) and non-Cambria/Avila Beach Unincorporated Area (54.3%) residents scored lowest. Among the other segments, Recent Movers (86.2%) and Established Families (80.5%) had the highest share of those who agreed with this statement, followed by Current Employees (75.0%), DMO Aware residents (72.3%), Millennials (72.2%), and Gen X (71.3%).

Money and the economy (29.5%) were by far the top drivers of sentiment around tourism's impact and whether residents felt that tourism makes their community a better place to live. Tourism is, in one resident's words, "a necessary evil", since it brings money and income that is needed for the community but also brings issues such as traffic, littering, and is seen by some to increase the cost of goods and services in their communities. Tourism is also seen as good for business, which in turn helps to maintain the quality of community life. In particular, Pismo Beach residents (47.0%) were more likely to cite the economic/monetary benefits of tourism as the reason for their agreement rating for the statement "I believe tourism in my community makes it a better place in which to live."

Figure: Agreement Levels with "Tourism Makes My Community a Better Place to Live"



All SLO CAL Residents

46.7%
OF ALL CALIFORNIA RESIDENTS SAY TOURISM MAKES THEIR COMMUNITY A BETTER PLACE TO LIVE

*Tourism **helps local shops** with **revenue**, but tourism also brings **ignorant irresponsible** people who **trash the community.***

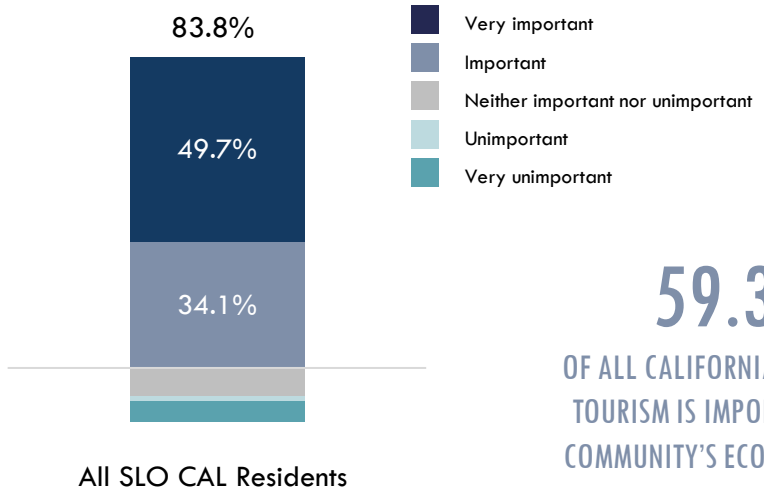
*Yes, **tourism brings in income** that we appreciate, but at the same time, that income **only goes back into the tourist industry**, and the town is too focused on that. We're expanding for the tourists, while the **residents keep paying** more and more to live here."*

EXECUTIVE SUMMARY

Economic Impact of Tourism in San Luis Obispo County

Over eight in ten (83.7%) residents said that tourism is important or very important to the vitality of San Luis Obispo County's economy. In fact, nearly half (49.7%) said tourism is very important. While across the segments the share of respondents who said tourism is important or very important never dips below 70 percent, sentiment is lowest among Paso Robles (72.2%) and non-Cambria/Avila Beach Unincorporated Area (76.6%) residents, as well as Gen Z (71.3%). On the other hand, Cambria (93.6%) and San Luis Obispo (87.0%) residents had the highest sentiment among the community segments. Additionally, Established Families (90.6%), Recent Movers (89.9%), DMO Aware (881.%) Gen X (87.4%), and White/Caucasian residents (85.2%) also had significantly higher shares of respondents who rated tourism as important or very important to the county's economic health.

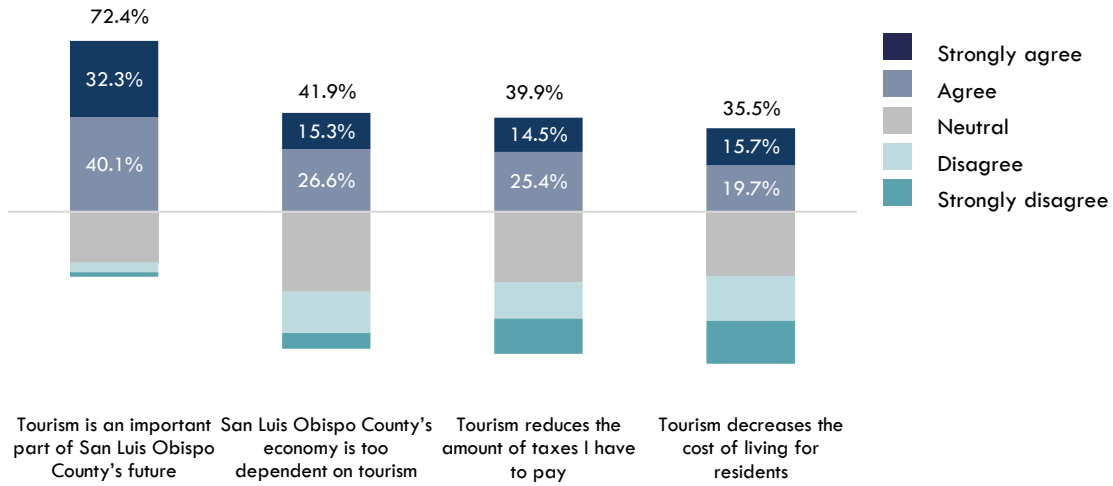
Figure: Tourism's Importance to SLO CAL's Economic Vitality



59.3%

OF ALL CALIFORNIA RESIDENTS SAY TOURISM IS IMPORTANT TO THEIR COMMUNITY'S ECONOMIC VITALITY

Figure: Economic Impact Statements



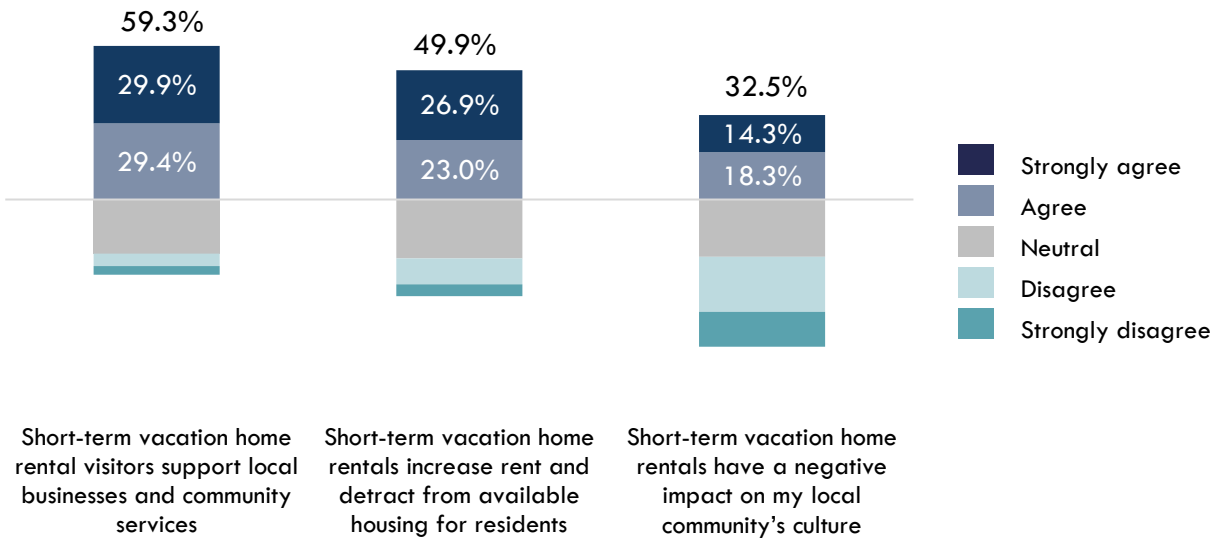
Nearly three-fourths of residents agree that tourism is an important part of San Luis Obispo County's future (72.4%). At the same time, four in ten (41.9%) believe that San Luis Obispo County's economy is too dependent on tourism. Residents are also less likely to perceive the personal economic benefits of tourism, with only 39.9 percent agreeing that tourism reduces the amount of taxes they have to pay, and 35.5 agreeing that tourism decreases the cost of living for residents. Current Employees and DMO Aware residents were significantly more likely to agree that tourism reduces taxes and the cost of living for residents, as were Recent Movers and Established Families and Millennials and Gen X residents, the two generations who comprise the bulk of the workforce age range. In terms of community segments, San Luis Obispo, Cambria, and Avila Beach residents were most likely to agree with these two cost-related statements, while Paso Robles, Arroyo Grande, and non-Cambria/Avila Beach Unincorporated Area residents were least likely.

EXECUTIVE SUMMARY

Short-Term Vacation Home Rentals Sentiment

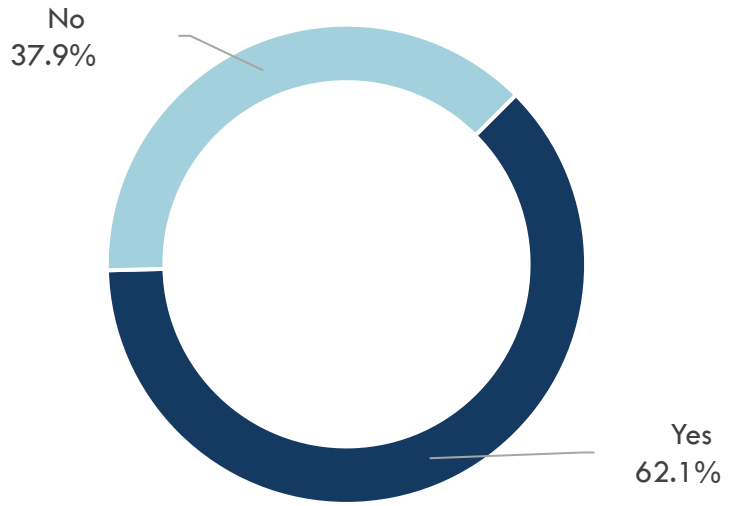
Nearly six in ten (59.3%) residents agreed that short-term vacation home rental visitors support local businesses and community services, but at the same time half (49.9%) agreed that these rentals increase rent and detract from available housing for residents. Just under one-third (32.5%) agreed that these rentals negatively impact their local community's culture. Over 70 percent of Recent Movers (77.9%), Established Families (74.9%), San Luis Obispo residents (74.0%), and Current Employees (71.7%) agreed that short-term vacation home rental visitors support local businesses and community services, but at least 40 percent of each of those same segments also agreed that rentals have a negative impact on community culture. 58.9 percent of Established Families also agreed that these rentals increase rent and detract from available housing for residents.

Figure: Short-Term Rentals Community Impact Statements



Nearly two-thirds (62.1%) of residents have stayed in a short-term vacation home rental in the past. Notably, segments who had the highest agreement that vacation home rentals negatively impact their local community culture also had significantly higher rates of personal past usage of short-term rentals. These include Established Families (83.8%), Recent Movers (79.6%), Millennials (70.0%), and San Luis Obispo residents (69.8%). On the other hand, Avila Beach residents (37.1%) and Boomer+ residents (48.7%) were the least likely to have previously stayed in a short-term rental.

Figure: Residents who have Stayed in a Short-Term Vacation Rental Home when Traveling in the Past



LIVING IN SLO CAL

SLO CAL RESIDENTS BY TYPE

The majority of residents (84.6%) are not native to San Luis Obispo County. Over one in four (26.5%) moved to the county in the past five years, 29.3 percent moved between 6-14 years ago, and 28.7 percent moved to San Luis Obispo County 15 years ago or more.

Figure: SLO CAL Resident Type

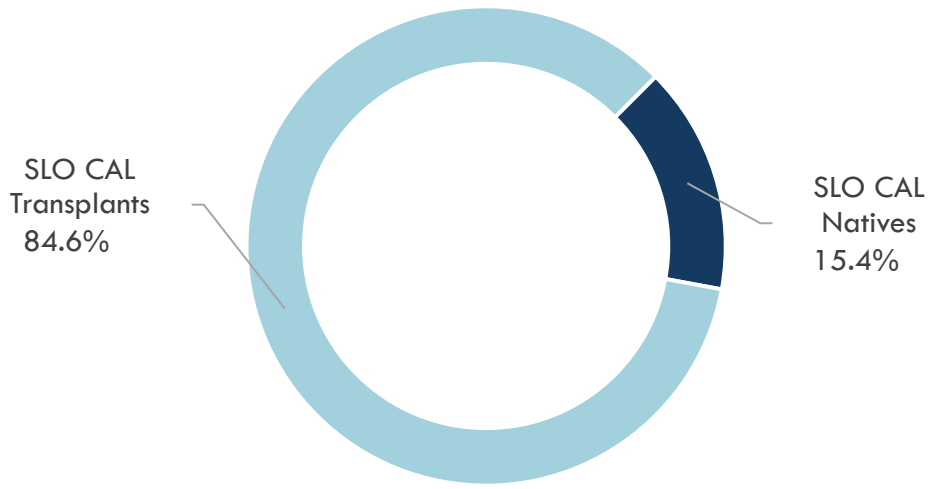
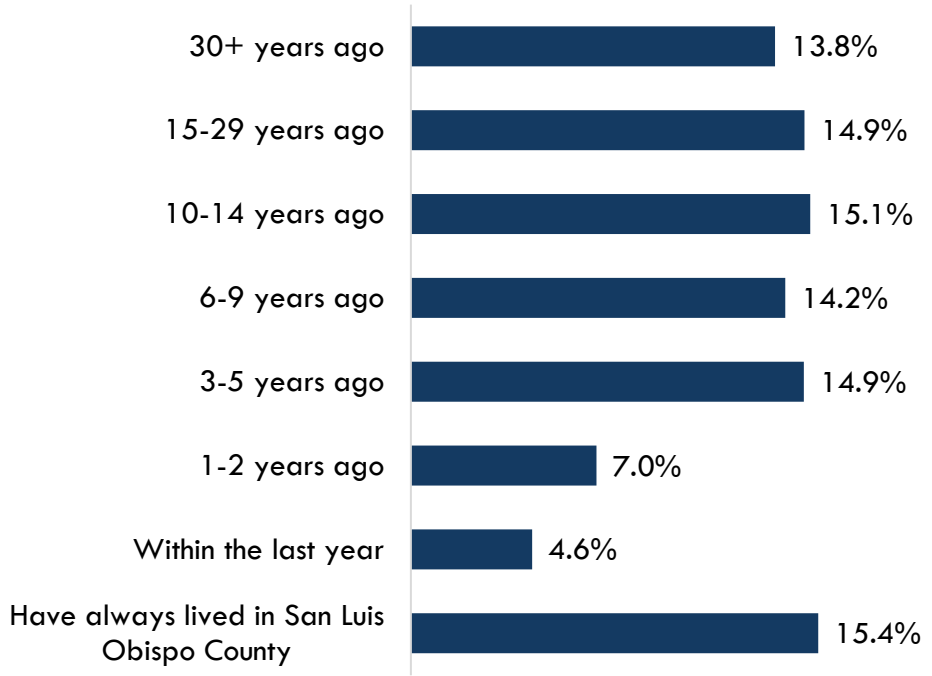


Figure: SLO CAL Length of Residency



Question: How long ago did you move to San Luis Obispo County? Base: All respondents. 2,520 completed surveys.

SLO CAL RESIDENTS BY TYPE

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
30+ years ago	10.0%	15.7%	17.0%	22.2%	19.0%	11.6%	10.9%	9.1%	10.5%	19.5%
15-29 years ago	9.3%	17.8%	17.8%	15.0%	21.8%	22.1%	11.4%	24.5%	13.1%	17.8%
10-14 years ago	17.9%	17.0%	11.0%	15.0%	9.1%	15.6%	17.7%	11.1%	22.2%	7.6%
6-9 years ago	16.1%	9.0%	14.3%	8.6%	22.2%	14.2%	11.5%	14.3%	7.8%	19.0%
3-5 years ago	19.1%	13.7%	9.1%	9.2%	10.1%	19.8%	14.0%	14.8%	8.5%	15.7%
1-2 years ago	8.8%	6.3%	4.5%	7.3%	5.9%	7.1%	15.8%	5.7%	2.5%	5.3%
Within the last year	6.6%	2.9%	2.9%	3.6%	3.0%	4.1%	6.0%	0.3%	2.1%	6.6%
Have always lived in San Luis Obispo County	12.2%	17.5%	23.4%	19.0%	8.7%	5.5%	12.6%	20.2%	33.3%	8.5%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SLO CAL RESIDENTS BY TYPE

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
30+ years ago	0.2%	3.2%	9.5%	30.8%	14.9%	7.7%	7.6%	16.3%	N/A	N/A	N/A	27.3%
15-29 years ago	8.8%	8.8%	15.2%	22.6%	15.1%	10.9%	12.8%	17.6%	N/A	N/A	N/A	72.7%
10-14 years ago	7.5%	20.1%	14.5%	12.1%	15.5%	15.3%	13.7%	17.9%	N/A	N/A	51.7%	N/A
6-9 years ago	12.6%	19.2%	14.1%	9.3%	13.9%	17.0%	16.1%	16.8%	N/A	N/A	48.3%	N/A
3-5 years ago	28.7%	17.5%	16.4%	7.9%	14.2%	19.9%	20.0%	17.6%	N/A	67.4%	N/A	N/A
1-2 years ago	14.0%	8.6%	7.3%	3.6%	6.5%	10.5%	10.2%	8.3%	N/A	32.6%	N/A	N/A
Within the last year	8.4%	5.8%	4.1%	2.7%	4.3%	6.5%	6.4%	5.4%	N/A	N/A	N/A	N/A
Have always lived in San Luis Obispo County	19.6%	16.7%	18.8%	11.1%	15.7%	12.3%	13.2%	N/A	100.0%	N/A	N/A	N/A
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

SLO CAL RESIDENTS BY TYPE

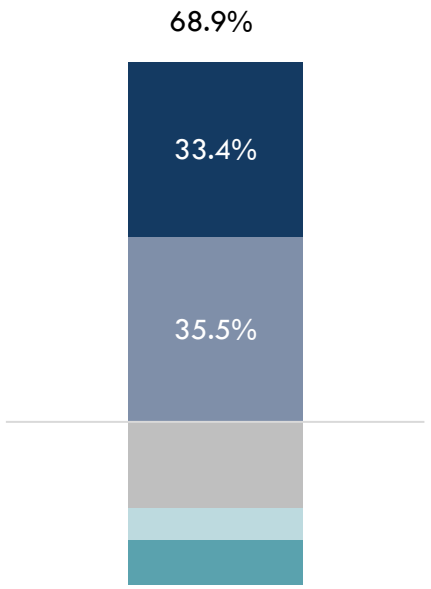
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
30+ years ago	6.6%	18.9%	15.9%	10.7%	17.2%
15-29 years ago	11.9%	12.4%	17.8%	14.4%	15.7%
10-14 years ago	14.9%	16.5%	13.2%	17.6%	13.2%
6-9 years ago	15.6%	9.6%	13.8%	17.5%	11.3%
3-5 years ago	23.3%	14.2%	12.3%	17.0%	12.9%
1-2 years ago	9.6%	6.5%	5.3%	7.5%	5.7%
Within the last year	5.7%	3.6%	4.3%	4.9%	3.6%
Have always lived in San Luis Obispo County	12.4%	18.3%	17.4%	10.5%	20.4%
Base	**646**	**388**	**1182**	**1246**	**958**

RESIDENCY DRIVEN BY PRIOR VISITATION

Among residents who moved to San Luis Obispo County, over two-thirds (68.9%) said they moved to their community because they had visited and loved the place. This is significantly higher compared to the State of California; only 35.5 percent of California residents said that they moved to their community after visiting and loving the place. Cambria (80.7%) and San Luis Obispo (78.8%) residents had the highest shares of respondents who agreed or strongly agreed with this statement.

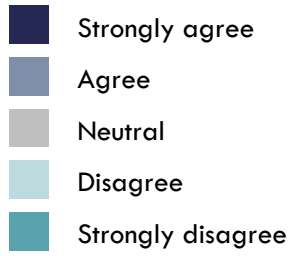
Among the other segments, Established Families (81.8%), Recent Movers (80.9%), and Millennials (76.1%) were the most likely to agree that they moved to their communities because of positive impressions made during previous visits to the area.



I moved to my local community primarily because I visited and loved the place

35.5%

OF ALL CALIFORNIA RESIDENTS MOVED TO THEIR COMMUNITY AFTER VISITING THE PLACE



Question: Please rate how much you agree or disagree with the following statement: "I moved to my local community primarily because I visited and love the place."
Base: Respondents who have not always lived in San Luis Obispo County. 2,132 completed surveys.

Destination Analysts

RESIDENCY DRIVEN BY PRIOR VISITATION

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Top 2 Box	**78.8%**	**54.4%**	**55.3%**	**64.6%**	**70.6%**	**67.4%**	**65.6%**	**80.7%**	**71.3%**	**57.1%**
Strongly agree	42.6%	16.6%	23.6%	34.2%	30.0%	35.5%	26.2%	34.2%	34.0%	26.6%
Agree	36.2%	37.8%	31.7%	30.3%	40.6%	32.0%	39.5%	46.4%	37.2%	30.5%
Neutral (neither agree nor disagree)	12.1%	18.6%	24.1%	18.9%	15.4%	13.3%	14.2%	9.2%	22.4%	24.3%
Disagree	2.9%	11.9%	10.7%	4.4%	7.3%	7.5%	11.1%	5.3%	1.7%	8.6%
Strongly disagree	6.2%	15.1%	9.9%	12.1%	6.7%	11.8%	9.1%	4.8%	4.7%	10.0%
Base	**864**	**189**	**153**	**147**	**92**	**125**	**90**	**134**	**106**	**222**

**Excluding residents of Avila Beach and Cambria*

RESIDENCY DRIVEN BY PRIOR VISITATION

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY	FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**63.1%**	**76.1%**	**68.4%**	**63.2%**	**70.1%**	**63.3%**	**64.5%**	**68.9%**	**80.9%**	**81.8%**	**67.5%**
Strongly agree	19.9%	37.3%	32.4%	32.8%	34.2%	31.4%	29.3%	33.3%	40.2%	42.5%	39.4%
Agree	43.2%	38.8%	36.0%	30.4%	35.9%	31.9%	35.1%	35.5%	40.7%	39.3%	28.1%
Neutral (neither agree nor disagree)	21.8%	14.3%	14.4%	18.6%	15.7%	21.2%	20.1%	16.5%	8.8%	9.7%	17.0%
Disagree	8.0%	4.0%	6.0%	7.7%	5.9%	5.4%	5.9%	6.1%	3.5%	3.8%	5.5%
Strongly disagree	7.1%	5.5%	11.2%	10.6%	8.3%	10.0%	9.5%	8.6%	6.8%	4.7%	10.1%
Base	**242**	**931**	**524**	**425**	**1364**	**338**	**685**	**2122**	**318**	**453**	**209**

RESIDENCY DRIVEN BY PRIOR VISITATION

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**73.6%**	**71.2%**	**63.6%**	**75.1%**	**64.8%**
Strongly agree	38.5%	33.5%	29.6%	40.9%	26.7%
Agree	35.0%	37.7%	34.0%	34.1%	38.1%
Neutral (neither agree nor disagree)	12.5%	19.8%	18.4%	10.8%	20.2%
Disagree	6.3%	5.0%	7.3%	5.4%	6.7%
Strongly disagree	7.6%	4.0%	10.7%	8.7%	8.2%
Base	**568**	**312**	**961**	**1110**	**756**

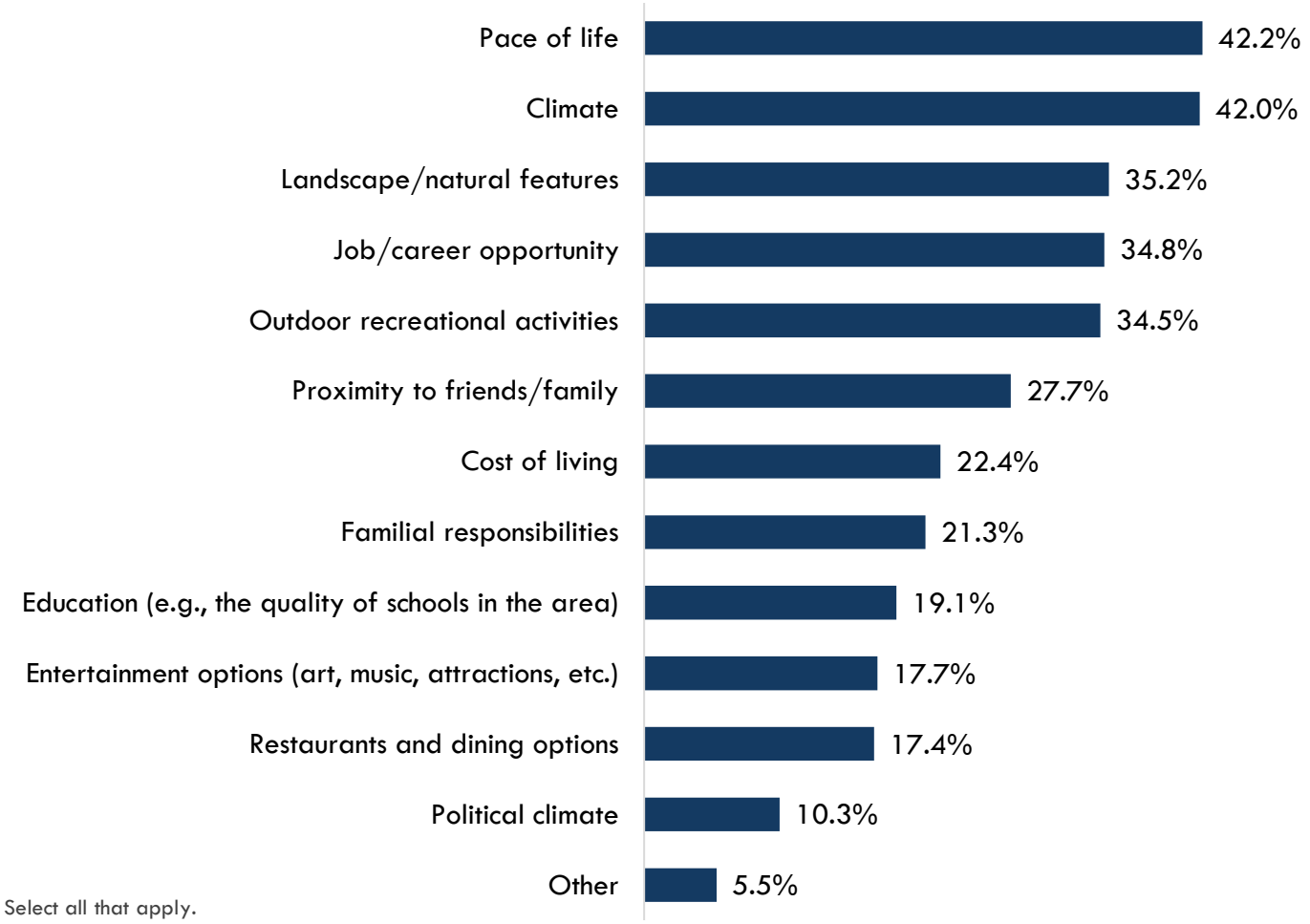
REASONS FOR MOVING TO COMMUNITY

Among residents who moved to San Luis Obispo County, the top reasons for moving to their local community were the pace of life (42.2%) and/or the climate (42.0%). Additionally, the landscape/natural features (35.2%), job/career opportunity (34.8%), and/or outdoor recreational activities (34.5%) also ranked highly as draws to moving to San Luis Obispo County's communities.

The pace of life was a particularly big motivator for Arroyo Grande (54.5%) and Morro Bay (54.1%) residents, as well as Boomer+ residents (52.6%).

A job/career opportunity was the top motivator for Recent Movers (45.4%), San Luis Obispo residents (44.0%), Current Employees of the tourism industry (42.6%), Millennials (40.7%), and Established Families (40.3%) to move to their local community.

Figure: Reasons for Moving to Local Community



Question: Which of the following reasons best describe why you originally moved to your local community? Select all that apply.
Base: All respondents. 2,520 completed surveys.

REASONS FOR MOVING TO SLO CAL

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA *
Pace of life	39.1%	39.5%	36.9%	54.5%	35.4%	54.1%	35.5%	40.0%	48.9%	44.4%
Climate	42.8%	25.7%	32.7%	51.8%	45.2%	55.3%	46.6%	40.5%	36.7%	45.5%
Landscape/natural features	36.2%	28.3%	27.5%	47.6%	30.1%	37.0%	28.0%	29.6%	49.5%	32.8%
Job/career opportunity	44.0%	23.7%	35.5%	32.4%	27.3%	31.8%	40.8%	32.1%	36.6%	20.7%
Outdoor recreational activities	38.1%	29.4%	23.0%	45.9%	29.3%	44.2%	33.3%	30.1%	22.5%	32.2%
Proximity to friends/family	29.8%	27.7%	33.8%	32.0%	23.3%	24.0%	20.1%	28.9%	16.5%	24.5%
Cost of living	28.5%	19.4%	18.2%	13.8%	28.9%	19.8%	12.8%	17.0%	31.4%	16.2%
Familial responsibilities	25.1%	13.1%	20.1%	14.0%	17.5%	19.2%	19.9%	30.1%	21.1%	20.8%
Education (e.g., the quality of schools in the area)	30.5%	7.0%	9.6%	13.3%	19.7%	15.2%	12.1%	18.8%	11.2%	12.6%
Entertainment options (art, music, attractions, etc.)	26.0%	8.1%	13.1%	13.0%	14.5%	15.1%	13.4%	14.4%	21.0%	10.4%
Restaurants and dining options	26.0%	13.3%	8.6%	18.9%	8.7%	10.3%	16.1%	12.6%	17.1%	9.8%
Political climate	15.0%	5.1%	8.2%	10.7%	6.6%	7.8%	5.7%	8.8%	8.2%	6.9%
Other	2.3%	12.0%	9.1%	7.0%	5.1%	2.7%	8.1%	5.2%	0.4%	9.5%
Base	**864**	**189**	**153**	**147**	**92**	**125**	**90**	**134**	**106**	**222**

**Excluding residents of Avila Beach and Cambria*

REASONS FOR MOVING TO SLO CAL

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY	FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Pace of life	27.9%	35.5%	40.7%	52.6%	42.9%	36.8%	38.2%	41.9%	42.4%	38.4%	37.5%
Climate	34.2%	37.0%	40.1%	49.5%	43.2%	37.2%	36.1%	22.4%	39.2%	37.5%	33.2%
Landscape/natural features	23.8%	33.2%	33.6%	40.2%	35.7%	32.5%	32.9%	19.1%	36.6%	35.9%	31.3%
Job/career opportunity	39.4%	40.7%	38.9%	25.7%	34.4%	41.3%	39.3%	17.6%	45.4%	40.3%	29.7%
Outdoor recreational activities	33.3%	36.3%	33.5%	33.4%	35.6%	30.8%	29.6%	21.3%	37.6%	38.6%	30.2%
Proximity to friends/family	27.8%	29.7%	30.4%	24.3%	27.9%	25.3%	26.9%	34.8%	28.8%	31.6%	32.0%
Cost of living	27.2%	30.9%	19.6%	14.5%	21.8%	28.1%	26.8%	35.1%	27.6%	30.0%	27.8%
Familial responsibilities	21.1%	26.8%	24.8%	14.0%	21.2%	21.5%	22.8%	5.5%	26.9%	31.3%	27.3%
Education	32.2%	29.7%	19.3%	5.6%	18.5%	22.4%	23.5%	34.4%	27.5%	30.5%	26.8%
Entertainment options	19.3%	25.5%	20.0%	8.2%	17.8%	20.3%	18.6%	42.2%	27.7%	31.7%	15.7%
Restaurants and dining options	22.5%	23.0%	17.5%	10.8%	17.4%	22.6%	19.5%	10.2%	24.3%	25.1%	14.0%
Political climate	11.3%	16.7%	9.8%	3.9%	10.9%	7.7%	7.8%	27.7%	16.1%	19.4%	10.6%
Other	1.8%	3.1%	6.0%	8.3%	5.6%	4.1%	3.8%	17.4%	0.6%	1.7%	5.7%
Base	**242**	**931**	**524**	**425**	**1364**	**338**	**685**	**2122**	**318**	**453**	**209**

REASONS FOR MOVING TO SLO CAL

Detail by Industry Segment

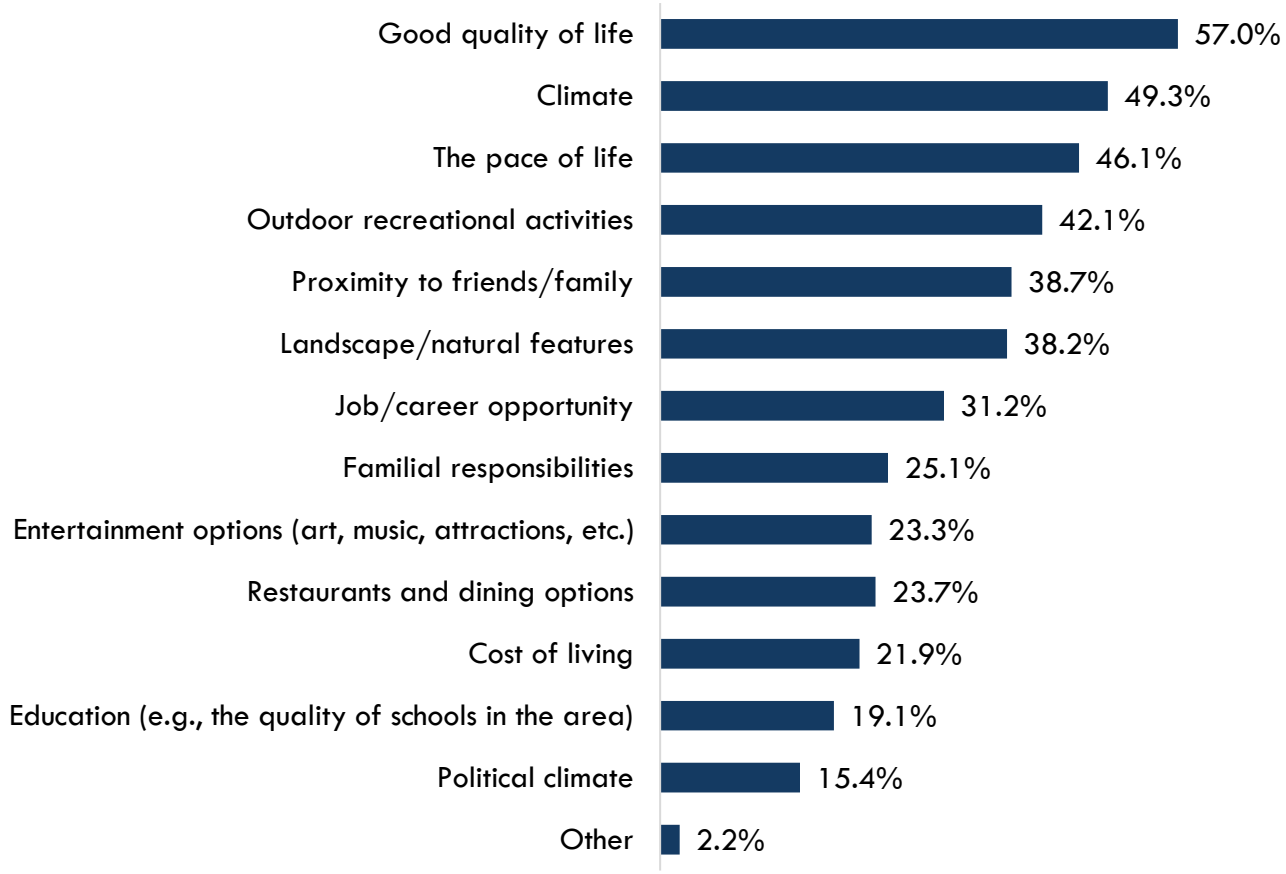
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Pace of life	37.1%	46.8%	43.6%	42.9%	40.9%
Climate	36.5%	41.7%	45.7%	41.5%	41.4%
Landscape/natural features	30.1%	42.3%	34.7%	36.5%	34.7%
Job/career opportunity	42.6%	35.3%	30.2%	36.4%	34.4%
Outdoor recreational activities	35.8%	38.1%	33.1%	37.5%	29.7%
Proximity to friends/family	29.2%	30.6%	26.8%	28.1%	25.6%
Cost of living	28.9%	22.2%	17.3%	23.9%	21.4%
Familial responsibilities	26.2%	22.4%	16.9%	25.8%	15.4%
Education (e.g., the quality of schools in the area)	28.8%	20.8%	12.7%	26.0%	11.5%
Entertainment options (art, music, attractions, etc.)	24.9%	17.8%	12.3%	22.9%	12.0%
Restaurants and dining options	22.4%	20.3%	12.6%	23.9%	10.5%
Political climate	14.8%	10.5%	6.1%	13.7%	6.2%
Other	2.8%	6.7%	7.2%	4.7%	5.4%
Base	**568**	**312**	**961**	**1110**	**756**

REASONS FOR CONTINUING TO LIVE IN SLO CAL

Quality life (57.0%) is the top driver for residents continuing to live in their local San Luis Obispo County community. This is followed by the climate (49.3%) and/or the pace of life (46.1%).

While many residents raised concerns about the cost of living, nevertheless over one in five (21.9%) said that they have continued to live in their community because of the cost of living. This was highest among Avila Beach residents (33.4%), Established Families (31.4%), Millennials (28.4%), San Luis Obispo residents (28.0%), and Current Employees (26.0%).

Figure: Reasons for Continuing to Live in SLO CAL



Question: Which of the following are reasons that have motivated you to continue living in your local community? Select all that apply.
Base: All respondents. 2,520 completed surveys.

REASONS FOR CONTINUING TO LIVE IN SLO CAL

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA *
Good quality of life	55.8%	49.9%	62.2%	63.6%	59.0%	61.8%	56.2%	48.9%	55.7%	58.7%
Climate	44.0%	35.0%	53.2%	67.4%	51.4%	53.7%	56.3%	43.6%	43.5%	60.3%
The pace of life	40.9%	42.0%	43.6%	54.0%	48.0%	54.6%	46.0%	40.4%	52.8%	55.7%
Outdoor recreational activities	42.5%	32.1%	42.3%	48.6%	36.8%	51.3%	45.6%	33.7%	33.6%	47.3%
Proximity to friends/family	39.6%	44.9%	41.5%	45.6%	26.5%	30.2%	32.8%	30.4%	25.3%	41.8%
Landscape/natural features	35.9%	33.2%	40.5%	41.8%	33.6%	43.3%	44.9%	33.6%	40.0%	42.8%
Job/career opportunity	38.3%	22.1%	30.9%	24.8%	20.0%	30.0%	34.3%	30.7%	30.4%	26.8%
Familial responsibilities	26.7%	24.6%	28.6%	24.1%	21.3%	14.7%	19.9%	32.1%	19.7%	25.5%
Entertainment options (art, music, attractions, etc.)	30.7%	12.0%	20.8%	18.5%	21.7%	17.7%	22.9%	27.5%	25.1%	16.1%
Restaurants and dining options	30.4%	26.0%	16.9%	23.1%	12.5%	16.2%	16.5%	23.3%	23.3%	16.1%
Cost of living	28.0%	13.3%	19.5%	8.0%	24.0%	18.4%	22.3%	22.8%	33.4%	18.9%
Education (e.g., the quality of schools in the area)	28.9%	10.3%	9.8%	17.6%	16.0%	17.0%	15.2%	22.8%	15.3%	7.8%
Political climate	21.5%	11.3%	9.4%	12.8%	15.4%	10.7%	9.8%	13.6%	9.9%	14.4%
Other	1.2%	5.8%	1.8%	4.4%	0.0%	1.1%	0.0%	4.2%	0.0%	2.3%
Base	**977**	**240**	**186**	**186**	**101**	**133**	**99**	**143**	**109**	**254**

**Excluding residents of Avila Beach and Cambria*

REASONS FOR CONTINUING TO LIVE IN SLO CAL

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Good quality of life	49.9%	47.4%	54.2%	70.9%	58.6%	51.8%	50.0%	57.1%	55.4%	50.4%	45.6%	59.7%
Climate	31.9%	38.8%	47.5%	66.1%	51.5%	39.7%	35.8%	49.0%	50.3%	38.4%	34.5%	45.4%
The pace of life	31.5%	36.6%	45.3%	60.6%	47.2%	39.1%	38.8%	46.7%	40.9%	39.6%	35.3%	39.0%
Outdoor recreational activities	38.3%	41.4%	39.3%	45.2%	43.5%	35.1%	33.1%	42.1%	41.4%	36.5%	39.9%	40.8%
Proximity to friends/family	36.1%	40.6%	39.3%	36.5%	40.0%	32.2%	31.0%	35.6%	61.5%	30.4%	35.1%	41.9%
Landscape/natural features	27.0%	32.9%	38.6%	46.4%	39.4%	32.8%	30.0%	38.3%	36.1%	32.3%	32.3%	34.4%
Job/career opportunity	36.2%	40.0%	36.2%	17.0%	30.5%	36.8%	36.5%	31.1%	32.4%	40.7%	36.0%	37.7%
Familial responsibilities	25.5%	29.7%	28.5%	17.6%	25.2%	22.2%	25.7%	23.0%	41.0%	27.7%	30.1%	31.8%
Entertainment options	23.8%	27.3%	23.2%	18.5%	24.3%	20.1%	20.5%	23.5%	21.2%	31.7%	31.9%	22.5%
Restaurants and dining options	23.6%	26.8%	20.1%	22.4%	24.4%	23.4%	21.4%	23.1%	28.2%	26.8%	26.2%	19.2%
Cost of living	20.6%	28.4%	21.0%	15.4%	22.0%	23.0%	23.3%	22.2%	19.7%	26.6%	31.4%	23.7%
Education	31.4%	27.7%	20.6%	5.5%	19.3%	18.3%	20.0%	18.1%	26.8%	27.3%	30.1%	27.8%
Political climate	11.5%	18.7%	16.0%	12.5%	16.4%	12.5%	11.9%	15.4%	15.9%	20.8%	23.6%	15.8%
Other	0.0%	0.8%	1.3%	4.7%	2.1%	1.2%	1.5%	2.1%	2.4%	0.0%	0.5%	0.5%
Base	**291**	**1090**	**609**	**438**	**1574**	**379**	**764**	**2122**	**306**	**318**	**453**	**209**

REASONS FOR CONTINUING TO LIVE IN SLO CAL

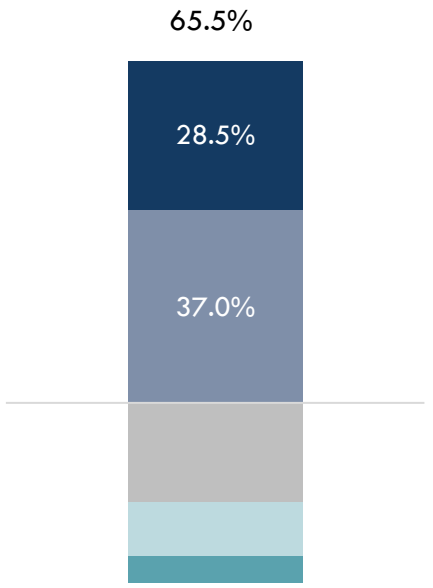
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Good quality of life	49.1%	56.8%	61.5%	55.0%	57.9%
Climate	34.1%	51.1%	57.1%	47.4%	50.9%
The pace of life	36.6%	47.0%	51.7%	45.2%	45.6%
Outdoor recreational activities	38.3%	43.2%	43.7%	45.2%	36.3%
Proximity to friends/family	34.1%	42.5%	41.1%	38.0%	38.7%
Landscape/natural features	32.9%	38.8%	41.1%	39.2%	36.2%
Job/career opportunity	41.2%	30.5%	26.0%	34.9%	27.4%
Familial responsibilities	28.8%	28.5%	21.5%	27.2%	22.3%
Entertainment options (art, music, attractions, etc.)	28.5%	25.8%	18.9%	29.0%	16.8%
Restaurants and dining options	26.5%	25.7%	20.7%	28.7%	19.3%
Cost of living	26.0%	23.8%	18.4%	24.5%	20.2%
Education (e.g., the quality of schools in the area)	27.3%	21.0%	13.8%	24.8%	13.8%
Political climate	18.8%	10.3%	13.8%	18.8%	11.5%
Other	0.9%	1.5%	3.3%	1.9%	2.8%
Base	**642**	**375**	**1109**	**1235**	**885**

SATISFACTION WITH SLO CAL DIRECTION

When asked how satisfied they are with the direct San Luis Obispo County is headed, two-thirds (65.5%) of residents said they are moderately or very satisfied. This is +10.7 percentage points higher than overall California residents (54.8%). Among the individual cities of residence, satisfaction levels were highest among Avila Beach (81.3%) and San Luis Obispo (77.6%) residents. Those who live in the unincorporated area of the county – excepting Avila Beach and Cambria – (51.6%) reported the lowest satisfaction levels

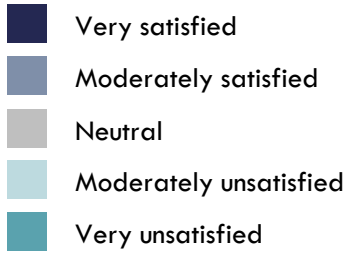
Among the segments, Established Families (80.2%) and Recent Movers (80.0%) reported the highest satisfaction levels with the county's direction. Notably, in the tourism employment segments, Current Employees (74.1%) had a significantly higher satisfaction level compared to Non-Employees (59.0%). Similarly, residents who are DMO Aware (72.6%) were more likely to be satisfied with the direction the county is headed compared to their DMO Unaware counterparts (60.6%).



Satisfaction with the direction San Luis Obispo County is headed

54.8%

OF ALL CALIFORNIA RESIDENTS ARE MODERATELY OR VERY SATISFIED WITH THE DIRECTION THEIR COMMUNITY IS HEADED



Question: All things considered, how satisfied are you with the direction San Luis Obispo County is headed?
Base: All respondents. 2,520 completed surveys.

Destination Analysts

SATISFACTION WITH SLO CAL DIRECTION

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA *
Top 2 Box	**77.6%**	**43.8%**	**55.8%**	**61.0%**	**55.6%**	**61.8%**	**58.4%**	**73.2%**	**81.3%**	**51.6%**
Very satisfied	43.1%	14.8%	23.1%	17.5%	12.9%	17.5%	26.2%	35.2%	32.8%	13.2%
Moderately satisfied	34.5%	29.0%	32.7%	43.5%	42.6%	44.3%	32.2%	38.0%	48.5%	38.4%
Neutral	11.9%	29.1%	29.7%	20.3%	23.6%	21.4%	19.7%	13.3%	14.3%	25.0%
Moderately unsatisfied	6.6%	20.2%	10.7%	12.5%	12.6%	9.5%	13.6%	8.7%	4.1%	15.7%
Very unsatisfied	3.8%	6.9%	3.8%	6.2%	8.2%	7.4%	8.2%	4.9%	0.3%	7.8%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SATISFACTION WITH SLO CAL DIRECTION

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**62.6%**	**72.8%**	**68.1%**	**56.8%**	**66.4%**	**66.4%**	**63.8%**	**65.5%**	**65.0%**	**80.0%**	**80.2%**	**71.3%**
Very satisfied	22.5%	38.9%	31.6%	16.9%	28.1%	31.9%	32.8%	28.2%	30.1%	44.9%	47.2%	36.5%
Moderately satisfied	40.1%	33.9%	36.6%	39.8%	38.3%	34.5%	31.0%	37.4%	35.0%	35.1%	33.0%	34.8%
Neutral	25.9%	14.4%	17.9%	22.8%	18.5%	18.5%	20.4%	18.3%	22.2%	8.9%	11.1%	11.7%
Moderately unsatisfied	9.2%	8.6%	8.0%	14.3%	10.3%	10.6%	10.2%	10.7%	9.1%	7.4%	5.2%	12.0%
Very unsatisfied	2.3%	4.2%	6.0%	6.2%	4.8%	4.5%	5.6%	5.4%	3.7%	3.7%	3.5%	5.1%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

SATISFACTION WITH SLO CAL DIRECTION

Detail by Industry Segment

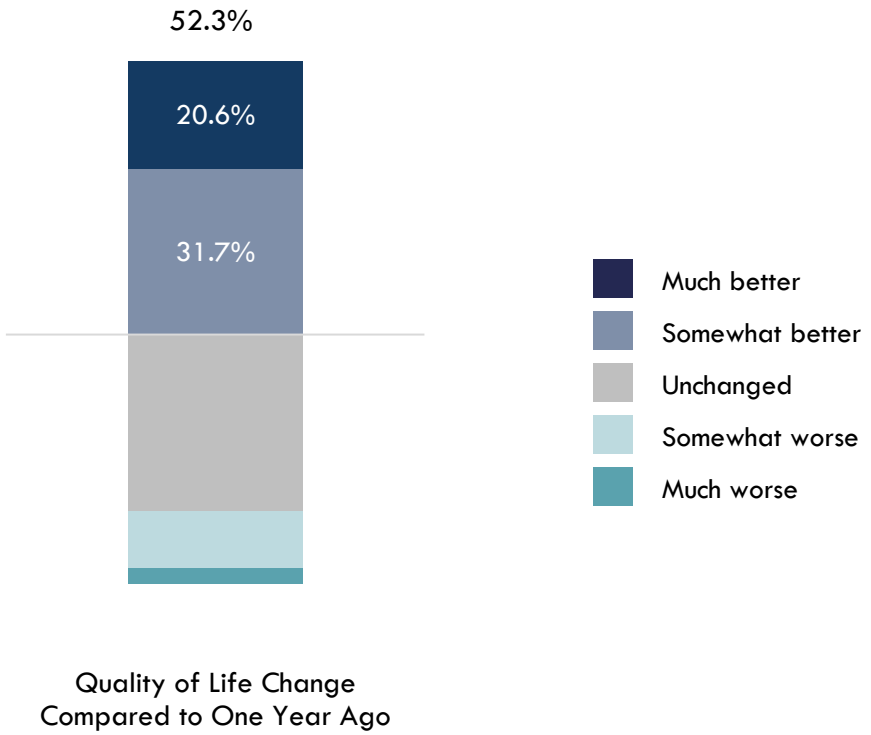
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**74.1%**	**66.0%**	**59.0%**	**72.6%**	**60.6%**
Very satisfied	41.9%	24.2%	19.9%	36.5%	22.2%
Moderately satisfied	32.2%	41.8%	39.0%	36.1%	38.4%
Neutral	15.5%	20.9%	21.7%	13.8%	21.2%
Moderately unsatisfied	7.5%	10.6%	12.4%	9.9%	11.4%
Very unsatisfied	2.9%	2.5%	6.9%	3.7%	6.7%
Base	**646**	**388**	**1182**	**1246**	**958**

SLO CAL PERSONAL QUALITY OF LIFE

Just over half of residents (52.2%) say their personal quality of life has improved compared to one year ago. One-third (33.8%) say their quality of life has not changed, while only 13.9 percent say it has worsened.

Among the cities of residence, Avila Beach (80.2%) San Luis Obispo (68.3%) had the highest shares of respondents who said their quality of life is somewhat or much better than one year ago. On the other hand, Paso Robles (35.2%) and non-Cambria/Avila Beach Unincorporated Area (33.7%) residents had not only significantly lower likelihood to say their quality of life had improved, but they were also more likely to say that their quality of life had worsened in the past year (23.1% of Paso Robles residents, 22.0% of non-Cambria/Avila Beach Unincorporated Area residents).

Established Families (76.0%), Recent Movers (72.2%), Current Employees (70.0%), and Millennials (68.4%) were significantly more likely to say that their personal quality of life has improved compared to one year ago.



Quality of Life Change
Compared to One Year Ago

Question: Compared to one year ago, how would you rate your personal quality of life in San Luis Obispo County?
Base: All respondents. 2,520 completed surveys.

SLO CAL PERSONAL QUALITY OF LIFE

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA *
Top 2 Box	**68.3%**	**35.2%**	**41.0%**	**32.9%**	**34.1%**	**39.5%**	**45.7%**	**61.8%**	**80.2%**	**33.7%**
Much better	32.3%	11.1%	15.2%	10.1%	10.1%	10.9%	17.9%	20.1%	27.0%	10.9%
Somewhat better	36.0%	24.0%	25.9%	22.7%	24.0%	28.5%	27.8%	41.6%	53.1%	22.8%
Unchanged/same	22.8%	41.8%	43.2%	49.6%	46.7%	44.3%	32.3%	30.2%	16.7%	44.3%
Somewhat worse	7.0%	16.8%	11.4%	13.9%	14.6%	13.4%	16.6%	6.1%	2.2%	19.1%
Much worse	2.0%	6.3%	4.4%	3.7%	4.7%	2.9%	5.4%	1.9%	0.9%	2.9%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SLO CAL PERSONAL QUALITY OF LIFE

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**59.2%**	**68.4%**	**56.8%**	**30.8%**	**51.7%**	**60.7%**	**57.8%**	**51.7%**	**54.8%**	**72.2%**	**76.0%**	**60.8%**
Much better	19.5%	30.3%	24.0%	8.5%	20.2%	25.7%	23.3%	20.2%	22.5%	32.7%	35.1%	25.9%
Somewhat better	39.7%	38.1%	32.8%	22.3%	31.6%	35.0%	34.6%	31.5%	32.3%	39.5%	40.9%	34.8%
Unchanged/same	30.9%	21.3%	27.5%	51.5%	34.8%	27.5%	28.6%	34.4%	30.7%	18.4%	16.6%	23.0%
Somewhat worse	9.2%	8.3%	10.8%	14.2%	10.8%	9.3%	9.8%	10.7%	11.9%	7.7%	5.5%	12.2%
Much worse	0.7%	2.1%	4.9%	3.6%	2.6%	2.4%	3.8%	3.1%	2.6%	1.7%	1.9%	4.0%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

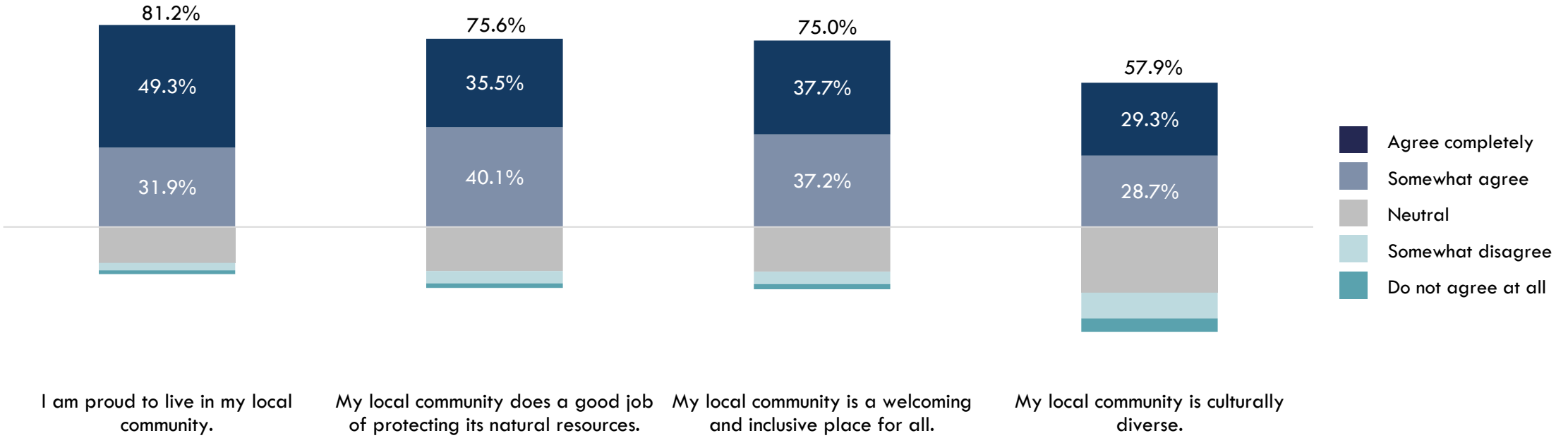
SLO CAL PERSONAL QUALITY OF LIFE

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**70.0%**	**50.8%**	**41.7%**	**60.3%**	**47.0%**
Much better	31.1%	17.7%	13.3%	27.7%	15.0%
Somewhat better	38.9%	33.0%	28.4%	32.6%	31.9%
Unchanged/same	20.4%	35.8%	42.5%	26.7%	38.1%
Somewhat worse	8.5%	10.5%	12.2%	10.3%	11.2%
Much worse	1.1%	2.9%	3.6%	2.7%	3.8%
Base	**646**	**388**	**1182**	**1246**	**958**

SLO CAL COMMUNITY SENTIMENT

Over eight in ten (81.2%) of San Luis Obispo County residents said they are proud to live in their local community. Three-fourths agreed that their local community protects its natural resources well (75.6%) and is a welcoming and inclusive place (75.0%). Just over half (57.9%) agreed that their local community is culturally diverse. San Luis Obispo residents (84.5%) were most likely to agree that they are proud to live in their community, while Gen Z (69.2%) had the lowest agreement levels. Avila Beach residents (88.9%) had the highest agreement levels around the statement "My local community does a good job of protecting its natural resources", while Paso Robles residents (61.0%) were significantly less likely to agree. In terms of whether they agree that their community is welcoming and inclusive, Avila Beach residents (88.1%) ranked highest in agreement, while Paso Robles residents (63.7%) and Gen Z (62.7%) had the lowest agreement levels. Morro Bay residents (43.1%) and non-Cambria/Avila Beach Unincorporated Area residents (42.8%) were the least likely to agree that their communities are culturally diverse, while Avila Beach (84.6%) and San Luis Obispo (68.0%) residents ranked highest in agreement levels.



Question: Please rate your level of agreement with the following statements. Base: All respondents. 2,520 completed surveys.

SLO CAL COMMUNITY SENTIMENT

Detail by Resident Community Segment

Top 2 Box	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA *
I am proud to live in my local community.	84.5%	74.2%	81.5%	79.6%	80.1%	82.6%	74.0%	78.3%	88.1%	77.0%
My local community is culturally diverse.	68.0%	46.9%	50.5%	45.6%	53.6%	43.1%	58.4%	60.1%	84.6%	43.8%
My local community does a good job of protecting its natural resources.	79.0%	61.0%	76.2%	75.5%	71.8%	78.0%	66.5%	81.2%	88.9%	68.9%
My local community is a welcoming and inclusive place for all.	78.0%	63.7%	71.9%	78.7%	71.7%	69.2%	74.8%	76.0%	88.1%	70.1%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SLO CAL COMMUNITY SENTIMENT

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
Top 2 Box	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
I am proud to live in my local community.	69.2%	80.1%	82.4%	84.2%	81.9%	80.7%	78.1%	80.8%	83.1%	82.3%	83.7%	82.5%
My local community is culturally diverse.	55.3%	65.6%	58.4%	50.3%	57.4%	62.5%	62.1%	57.2%	62.0%	74.1%	69.0%	60.8%
My local community does a good job of protecting its natural resources.	62.1%	75.7%	79.0%	76.5%	76.6%	72.9%	71.7%	75.0%	79.1%	76.8%	80.9%	75.4%
My local community is a welcoming and inclusive place for all.	62.7%	76.6%	75.5%	75.7%	75.3%	75.3%	74.7%	74.4%	78.1%	80.1%	81.4%	77.6%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

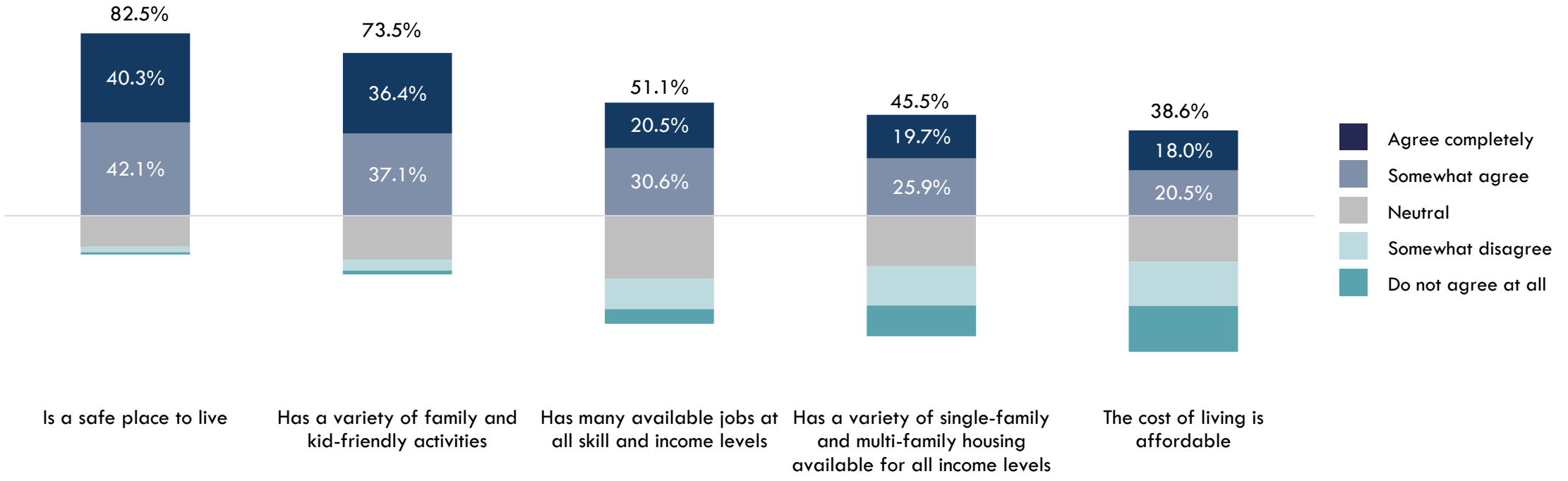
SLO CAL COMMUNITY SENTIMENT

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
Top 2 Box	**CURRENT EMPLOYEES**	**PAST EMPLOYEES**	**NON-EMPLOYEES**	**DMO AWARE**	**DMO UNAWARE**
I am proud to live in my local community.	79.6%	81.3%	81.1%	81.8%	79.9%
My local community is culturally diverse.	67.1%	61.9%	50.2%	59.6%	55.7%
My local community does a good job of protecting its natural resources.	78.1%	79.3%	73.5%	76.8%	75.4%
My local community is a welcoming and inclusive place for all.	76.5%	73.3%	74.1%	76.4%	73.7%
Base	**646**	**388**	**1182**	**1246**	**958**

SLO CAL COMMUNITY ASSETS

A solid majority of residents agreed that San Luis Obispo County is a safe place to live (82.5%) and has a variety of family and kid-friendly activities (73.5%), however agreement levels dropped in terms of the availability of a variety of jobs (51.1%), a variety of available housing for all income levels (45.5%), and affordable cost of living (38.6%). San Luis Obispo and Avila Beach residents had higher agreement levels for all statements, whereas Paso Robles residents were significantly less likely to agree on all points. Millennials, Recent Movers, Established Families, Current Employees, and DMO Aware residents had higher agreement levels around the availability of a variety of jobs and housing, and affordable cost of living.



Question: Please rate your level of agreement with the following statements. Base: All respondents. 2,520 completed surveys.

SLO CAL COMMUNITY ASSETS

Detail by Resident Community Segment

Top 2 Box	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Is a safe place to live	86.2%	70.6%	81.3%	83.2%	75.9%	82.8%	79.3%	88.1%	89.9%	76.8%
Has a variety of family and kid-friendly activities	78.9%	62.3%	71.3%	69.4%	70.3%	65.2%	72.8%	71.7%	87.7%	68.9%
Has many available jobs at all skill and income levels	66.5%	35.2%	42.2%	35.8%	38.6%	33.4%	42.3%	58.0%	71.9%	36.2%
Has a variety of single-family and multi-family housing available for all income levels	61.7%	24.8%	36.9%	32.1%	33.4%	26.0%	42.1%	57.7%	68.2%	25.2%
The cost of living is affordable	58.0%	18.2%	30.7%	19.7%	27.2%	24.1%	28.9%	46.6%	56.3%	16.4%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SLO CAL COMMUNITY ASSETS

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
Top 2 Box	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Is a safe place to live	71.6%	83.2%	83.2%	83.8%	83.5%	80.3%	77.8%	82.2%	83.7%	85.1%	84.4%	84.5%
Has a variety of family and kid-friendly activities	67.7%	75.1%	76.9%	70.9%	73.6%	76.3%	73.3%	72.5%	78.4%	76.0%	79.7%	76.9%
Has many available jobs at all skill and income levels	56.6%	65.4%	52.0%	34.3%	50.1%	59.2%	59.2%	49.9%	58.0%	71.8%	69.0%	62.0%
Has a variety of single-family and multi-family housing available for all income levels	47.6%	59.6%	47.5%	29.0%	44.7%	52.2%	52.7%	44.8%	49.4%	68.6%	70.2%	50.9%
The cost of living is affordable	40.1%	55.0%	40.6%	19.6%	38.2%	42.5%	43.7%	39.4%	33.7%	63.7%	65.6%	46.3%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

SLO CAL COMMUNITY ASSETS

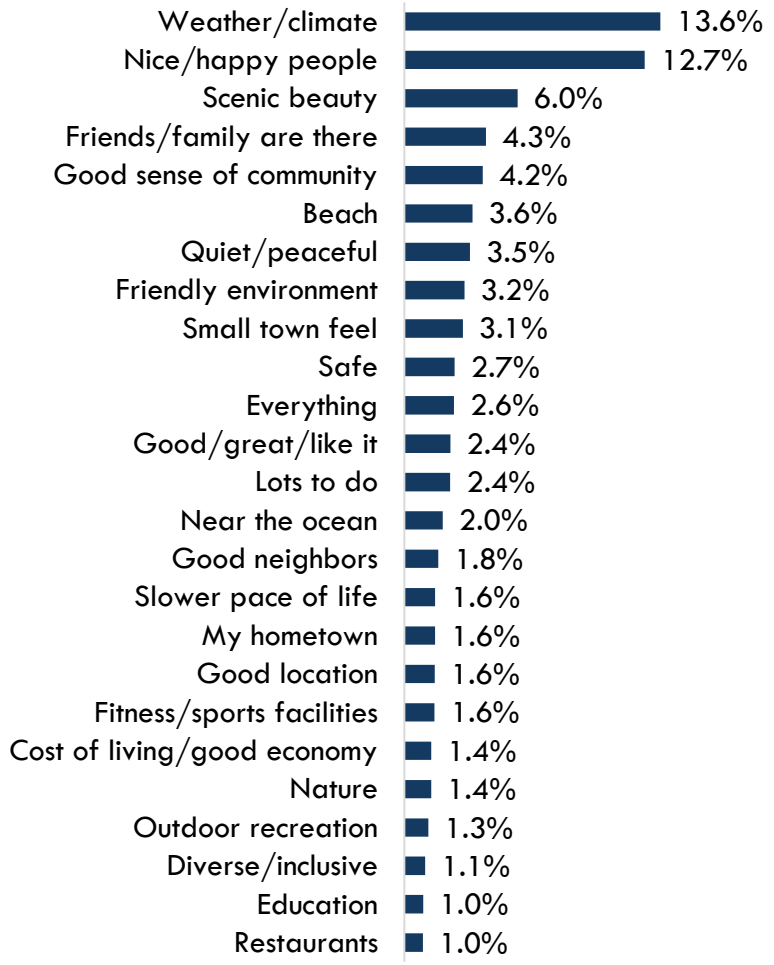
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
Top 2 Box	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Is a safe place to live	83.5%	84.7%	80.9%	83.9%	81.3%
Has a variety of family and kid-friendly activities	76.0%	75.4%	71.4%	76.5%	70.4%
Has many available jobs at all skill and income levels	65.4%	48.8%	42.0%	54.9%	49.2%
Has a variety of single-family and multi-family housing available for all income levels	61.1%	41.0%	35.9%	52.4%	40.4%
The cost of living is affordable	57.1%	36.7%	27.0%	45.4%	33.5%
Base	**646**	**388**	**1182**	**1246**	**958**

FAVORITE ASPECT ABOUT LOCAL COMMUNITY (UNAIDED)

The quality of the weather/climate (13.6%) was the top characteristic residents love the most about their community, followed closely by the sense of community and the friendliness of the people (12.7%).

Among the segments, Grover Beach (14.7%) and Pismo Beach (11.8%) residents were more likely to cite the beach in their community as one of their favorite aspects about living in their local community. The friendly environment mentioned more by Recent Movers (7.9%) and Established Families (6.9%)



Question: What do you love most about living in your community? Base: All respondents. 2,520 completed surveys.

FAVORITE ASPECT ABOUT LOCAL COMMUNITY (UNAIDED)

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Weather/climate	11.0%	9.9%	14.9%	22.0%	25.7%	14.0%	14.1%	11.0%	6.2%	18.1%
Nice/happy people	14.3%	12.1%	10.9%	13.5%	5.6%	9.1%	8.4%	12.3%	7.7%	18.3%
Scenic beauty	4.2%	10.3%	5.7%	4.3%	4.3%	6.4%	11.9%	6.7%	9.2%	5.9%
Friends/family are there	4.4%	6.0%	7.6%	4.4%	4.2%	2.3%	0.0%	1.3%	3.3%	4.6%
Good sense of community	3.7%	4.3%	4.5%	5.3%	1.5%	3.0%	5.6%	6.7%	3.5%	4.3%
Beach	1.1%	0.4%	2.9%	6.9%	14.6%	4.5%	11.8%	0.7%	4.4%	6.1%
Quiet/peaceful	3.6%	2.5%	4.4%	2.6%	0.5%	2.2%	6.0%	5.6%	5.6%	2.2%
Friendly environment	4.5%	1.5%	3.1%	1.3%	4.2%	3.1%	2.5%	6.3%	1.2%	1.6%
Small town feel	0.8%	7.6%	4.3%	1.6%	4.8%	7.8%	3.2%	3.6%	0.0%	5.2%
Safe	4.4%	2.4%	1.4%	2.5%	2.0%	1.9%	2.2%	1.3%	0.9%	1.4%
Everything	3.8%	0.2%	2.3%	1.4%	1.1%	1.9%	1.8%	4.2%	5.1%	1.3%
Good/great/like it	4.5%	0.9%	1.0%	0.7%	1.1%	0.8%	2.4%	0.7%	2.6%	2.4%
Lots to do	1.8%	3.3%	4.3%	0.9%	0.0%	0.0%	3.6%	5.4%	7.4%	0.4%
Near the ocean	0.9%	2.0%	0.7%	3.9%	5.4%	6.2%	0.6%	2.5%	2.0%	2.0%
Good neighbors	1.9%	1.8%	1.9%	1.6%	1.1%	3.4%	1.1%	2.7%	2.4%	0.4%
Slower pace of life	0.6%	2.8%	1.1%	1.2%	2.1%	3.0%	3.2%	1.0%	0.6%	4.0%
My hometown	1.5%	2.3%	1.7%	3.2%	1.1%	0.8%	0.0%	2.5%	0.9%	1.3%
Good location	2.1%	0.9%	1.0%	0.7%	0.0%	0.8%	0.6%	0.7%	6.3%	0.7%
Fitness/sports facilities	2.6%	0.0%	0.0%	0.7%	2.1%	0.0%	0.6%	6.0%	1.7%	0.5%
Cost of living/good economy	2.5%	2.1%	1.2%	0.2%	1.1%	1.5%	0.0%	1.0%	0.0%	0.3%
Nature	1.5%	1.3%	0.2%	1.1%	1.5%	3.7%	1.8%	0.7%	1.8%	1.3%
Outdoor recreation	1.4%	0.6%	3.6%	0.4%	0.0%	1.5%	2.5%	0.7%	0.6%	0.9%
Diverse/inclusive	1.9%	1.1%	0.0%	0.7%	1.1%	1.9%	1.1%	0.0%	1.4%	0.0%
Education	1.5%	1.1%	0.7%	0.0%	1.1%	2.3%	1.8%	0.7%	0.3%	0.2%
Restaurants	0.8%	2.8%	0.0%	0.6%	0.0%	2.3%	2.4%	0.7%	0.6%	0.9%
Base	**940**	**226**	**191**	**184**	**99**	**130**	**94**	**146**	**155**	**247**

**Excluding residents of Avila Beach and Cambria*

FAVORITE ASPECT ABOUT LOCAL COMMUNITY (UNAIDED)

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Weather/climate	7.2%	6.2%	14.4%	22.2%	14.1%	9.8%	9.4%	14.4%	9.0%	8.7%	3.6%	9.7%
Nice/happy people	17.8%	14.6%	10.1%	11.2%	11.6%	17.0%	18.5%	13.7%	7.5%	12.5%	12.6%	8.6%
Scenic beauty	4.7%	5.8%	5.8%	6.6%	6.3%	5.4%	4.6%	6.0%	6.3%	5.7%	4.5%	5.6%
Friends/family are there	5.8%	4.3%	3.9%	4.2%	4.6%	3.1%	3.4%	3.7%	7.7%	2.6%	3.4%	6.7%
Good sense of community	6.0%	4.3%	4.7%	3.2%	4.2%	3.8%	4.0%	4.1%	4.6%	7.0%	5.4%	5.2%
Beach	3.0%	2.2%	6.2%	3.6%	3.8%	3.0%	3.0%	3.7%	3.3%	3.7%	1.6%	3.0%
Quiet/peaceful	3.8%	3.2%	3.2%	3.8%	3.0%	6.1%	5.7%	3.6%	2.9%	3.8%	3.5%	2.0%
Friendly environment	3.5%	5.2%	3.7%	0.6%	3.3%	1.8%	2.6%	3.5%	1.6%	7.9%	6.9%	2.6%
Small town feel	0.5%	1.7%	2.5%	5.5%	3.3%	2.6%	2.0%	2.7%	5.0%	0.8%	0.9%	3.5%
Safe	5.1%	3.2%	3.4%	1.0%	2.5%	5.3%	3.8%	2.6%	3.1%	3.5%	3.8%	3.9%
Everything	1.5%	3.3%	3.7%	1.5%	2.7%	1.8%	2.6%	1.9%	6.5%	3.2%	4.7%	3.6%
Good/great/like it	3.0%	4.1%	1.6%	1.1%	2.7%	1.5%	1.4%	2.7%	1.2%	3.3%	4.9%	4.5%
Lots to do	2.3%	2.4%	1.5%	3.1%	2.6%	2.4%	2.0%	2.3%	3.4%	2.3%	2.3%	0.6%
Near the ocean	1.0%	0.6%	1.9%	3.9%	2.1%	1.3%	0.9%	2.2%	1.1%	0.2%	0.6%	0.3%
Good neighbors	2.8%	1.8%	1.7%	1.7%	1.8%	2.3%	1.7%	1.9%	1.5%	3.8%	2.7%	1.2%
Slower pace of life	0.0%	0.9%	2.1%	2.4%	1.6%	1.8%	1.9%	1.7%	1.1%	0.7%	0.9%	0.9%
My hometown	0.5%	1.9%	0.3%	2.4%	1.8%	1.6%	0.8%	0.7%	6.7%	0.4%	0.0%	0.6%
Good location	1.3%	1.9%	1.4%	1.5%	1.7%	1.3%	1.6%	1.4%	2.7%	0.0%	1.0%	0.0%
Fitness/sports facilities	0.5%	2.7%	2.6%	0.1%	1.5%	0.5%	2.4%	1.7%	1.1%	4.7%	4.0%	4.0%
Cost of living/good economy	3.0%	2.5%	1.1%	0.1%	1.4%	2.8%	1.9%	1.5%	1.1%	1.4%	3.4%	1.8%
Nature	3.3%	1.8%	1.6%	0.5%	1.3%	2.0%	1.7%	1.4%	1.2%	0.6%	2.2%	0.3%
Outdoor recreation	1.1%	1.4%	0.8%	1.4%	1.4%	1.0%	0.6%	1.3%	1.2%	0.2%	0.5%	0.0%
Diverse/inclusive	0.7%	2.0%	1.0%	0.4%	0.9%	2.0%	2.2%	1.2%	0.7%	1.2%	1.9%	0.9%
Education	0.8%	1.9%	1.1%	0.1%	1.0%	1.0%	0.9%	1.1%	0.4%	2.1%	1.1%	1.2%
Restaurants	2.6%	0.9%	1.5%	0.4%	0.8%	1.5%	1.7%	1.0%	0.6%	0.4%	1.1%	1.1%
Base	**284**	**1055**	**616**	**457**	**1574**	**375**	**759**	**2031**	**381**	**306**	**430**	**201**

FAVORITE ASPECT ABOUT LOCAL COMMUNITY (UNAIDED)

Detail by Industry Segment

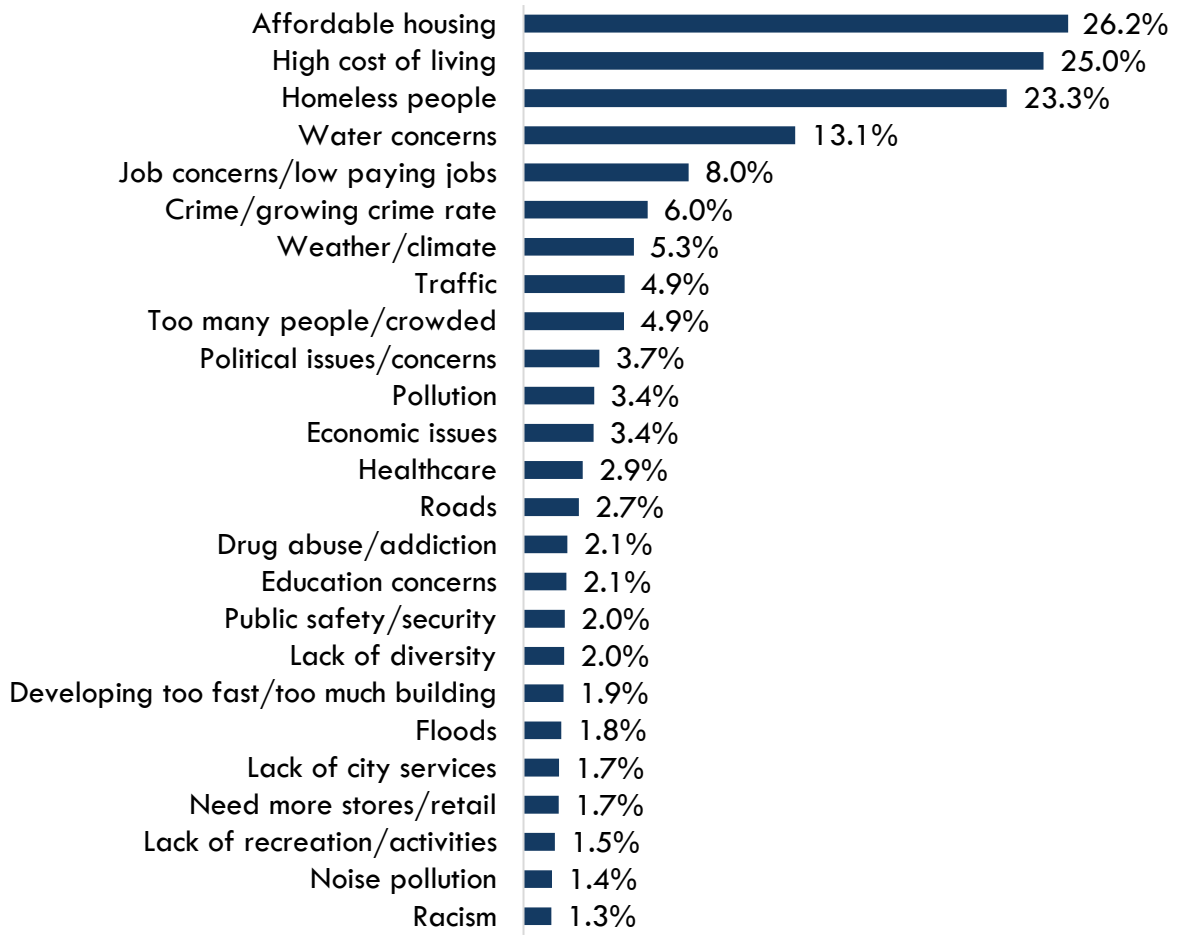
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Weather/climate	7.1%	11.9%	17.5%	11.1%	15.5%
Nice/happy people	15.5%	16.8%	10.7%	12.5%	12.5%
Scenic beauty	5.3%	8.0%	6.2%	5.8%	6.4%
Friends/family are there	3.1%	4.6%	4.8%	3.7%	4.9%
Good sense of community	5.8%	2.2%	4.0%	4.7%	3.8%
Beach	3.1%	3.9%	3.8%	2.7%	4.7%
Quiet/peaceful	3.5%	3.6%	3.6%	3.5%	3.7%
Friendly environment	5.7%	5.2%	1.5%	4.3%	2.3%
Small town feel	0.9%	3.6%	4.0%	2.7%	3.0%
Safe	4.2%	3.0%	2.3%	2.6%	2.5%
Everything	3.4%	1.4%	1.9%	2.6%	2.6%
Good/great/like it	4.0%	0.1%	1.4%	3.4%	1.4%
Lots to do	1.5%	4.1%	2.6%	2.1%	3.1%
Near the ocean	0.7%	1.8%	2.8%	1.8%	1.8%
Good neighbors	2.4%	0.8%	1.6%	2.0%	1.8%
Slower pace of life	0.7%	0.5%	2.5%	1.7%	1.4%
My hometown	0.5%	2.8%	1.7%	1.1%	1.3%
Good location	0.7%	2.1%	1.8%	1.4%	2.2%
Fitness/sports facilities	4.4%	1.2%	0.6%	2.6%	0.8%
Cost of living/good economy	1.6%	2.0%	1.1%	1.4%	1.2%
Nature	1.8%	1.2%	1.4%	1.3%	1.7%
Outdoor recreation	0.5%	1.1%	1.7%	1.1%	1.4%
Diverse/inclusive	1.8%	0.2%	1.0%	1.1%	1.0%
Education	2.3%	1.0%	0.6%	1.2%	0.9%
Restaurants	0.7%	0.8%	1.1%	1.1%	1.0%
Base	**616**	**379**	**1139**	**1189**	**923**

TOP 2 CHALLENGES FACING LOCAL COMMUNITY (UNAIDED)

Affordable housing (26.2%) and associated issues such as the cost of living (25.0%), and homelessness (23.3%) rose to the top, and were also tied to concerns about job opportunities (8.0%) that can help support people's cost of living. Affordable housing was of particular concern for Grover Beach residents (42.0%), while Avila Beach residents were more likely to cite the high cost of living (37.2%), and Atascadero residents had the highest share of respondents who mentioned homelessness (33.0%).

Residents also voiced concerns about water (13.1%), particularly around supply, possible water shortages, the quality of the water, and conservation efforts.

Tourism and tourists were only mentioned by 27 residents. Among those mentions, concerns were mixed; some residents felt that making their county into a tourism destination would make it more unaffordable, while others expressed concerns that there is not enough tourism.



Question: What are the top two (2) biggest issues your local community is currently facing? Base: All respondents. 2,520 completed surveys.

TOP 2 CHALLENGES FACING LOCAL COMMUNITY (UNAIDED)

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Affordable housing	19.6%	30.3%	35.1%	31.7%	42.0%	26.2%	15.6%	16.6%	23.2%	34.3%
High cost of living	22.3%	24.4%	29.1%	16.1%	25.2%	25.0%	30.3%	27.1%	37.2%	26.9%
Homeless people	23.2%	30.0%	33.0%	29.4%	31.6%	20.1%	23.3%	8.8%	7.0%	21.5%
Water concerns	4.7%	22.7%	10.0%	25.8%	7.7%	20.7%	6.2%	17.1%	1.3%	24.7%
Job concerns/low paying jobs	8.7%	7.0%	13.1%	9.3%	9.3%	9.2%	5.4%	6.0%	3.9%	4.8%
Crime/growing crime rate	9.3%	5.5%	3.0%	1.8%	3.7%	6.4%	11.3%	2.5%	1.4%	6.8%
Weather/climate	8.5%	4.0%	1.4%	2.6%	5.9%	6.0%	7.3%	4.6%	5.2%	2.5%
Traffic	5.4%	4.7%	3.5%	11.2%	2.7%	2.3%	1.2%	2.7%	3.5%	4.6%
Too many people/crowded	3.3%	1.9%	6.3%	3.5%	3.7%	2.3%	8.8%	13.0%	15.0%	1.3%
Political issues/concerns	2.7%	5.9%	1.4%	4.5%	2.1%	4.6%	3.5%	2.9%	2.5%	6.6%
Pollution	4.1%	2.6%	0.7%	1.8%	1.6%	4.1%	5.9%	3.5%	4.4%	4.5%
Economic issues	3.7%	2.1%	3.1%	1.1%	5.5%	0.8%	2.3%	7.5%	8.9%	0.7%
Healthcare	4.2%	1.7%	1.3%	2.3%	2.8%	1.6%	3.0%	1.3%	5.1%	2.1%
Roads	2.0%	4.1%	2.4%	3.7%	7.1%	6.6%	1.8%	0.0%	0.9%	2.0%
Drug abuse/addiction	2.0%	2.3%	6.1%	3.9%	0.0%	2.4%	0.0%	0.6%	0.0%	1.1%
Education concerns	3.2%	2.8%	1.9%	1.6%	1.6%	0.0%	2.5%	1.6%	1.5%	0.5%
Public safety/security	3.3%	1.0%	2.6%	0.5%	1.0%	2.4%	2.5%	0.7%	0.6%	1.8%
Lack of diversity	3.0%	2.5%	1.6%	2.7%	0.0%	2.3%	2.5%	0.0%	0.0%	1.0%
Developing too fast/too much building	3.1%	1.5%	1.7%	0.2%	1.1%	0.0%	0.0%	1.7%	0.0%	3.9%
Floods	1.7%	3.1%	1.2%	3.0%	1.1%	1.1%	7.6%	0.0%	0.0%	1.6%
Lack of city services	2.0%	0.6%	2.4%	4.0%	0.5%	1.9%	3.7%	0.0%	1.6%	0.2%
Need more stores/retail	1.8%	1.4%	2.1%	1.1%	2.2%	0.8%	2.3%	3.0%	1.6%	1.1%
Lack of recreation/activities	1.8%	4.0%	0.7%	0.2%	1.1%	2.4%	3.2%	0.3%	0.6%	0.7%
Noise pollution	2.2%	0.2%	0.5%	0.5%	0.0%	0.8%	1.1%	4.6%	1.9%	0.4%
Racism	2.4%	2.3%	0.2%	1.1%	0.0%	0.0%	0.6%	0.3%	0.0%	1.5%
Base	**843**	**230**	**191**	**180**	**95**	**127**	**94**	**147**	**145**	**245**

**Excluding residents of Avila Beach and Cambria*

TOP 2 CHALLENGES FACING LOCAL COMMUNITY (UNAIDED)

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Affordable housing	15.7%	17.1%	24.6%	37.8%	27.8%	20.4%	17.2%	26.7%	23.7%	11.6%	13.6%	17.0%
High cost of living	29.5%	22.8%	28.7%	23.9%	24.9%	28.6%	25.7%	23.0%	36.0%	20.1%	20.1%	24.5%
Homeless people	17.0%	18.7%	23.2%	28.9%	23.8%	22.5%	20.6%	22.7%	26.5%	11.5%	10.5%	19.7%
Water concerns	7.2%	6.0%	6.8%	24.6%	14.0%	5.6%	7.0%	14.7%	4.5%	5.3%	5.6%	8.4%
Job concerns/low paying jobs	6.0%	9.0%	9.3%	6.7%	8.0%	8.4%	8.4%	8.0%	7.4%	8.4%	10.0%	6.1%
Crime/growing crime rate	12.5%	9.4%	4.8%	2.2%	5.0%	12.4%	11.8%	6.1%	5.3%	9.0%	7.9%	5.5%
Weather/climate	12.2%	8.1%	4.8%	1.6%	4.9%	7.6%	7.8%	5.7%	3.5%	13.0%	6.1%	9.0%
Traffic	1.9%	5.2%	4.8%	5.3%	5.2%	1.8%	3.0%	5.4%	1.8%	6.0%	8.4%	2.8%
Too many people/crowded	3.4%	3.4%	6.4%	5.5%	4.8%	2.9%	4.6%	4.5%	6.7%	6.2%	5.9%	8.4%
Political issues/concerns	3.2%	2.0%	4.0%	5.1%	3.4%	4.2%	3.6%	3.8%	2.9%	3.2%	1.6%	2.8%
Pollution	8.3%	5.2%	1.9%	1.6%	3.0%	7.4%	5.9%	3.6%	2.1%	8.8%	5.8%	2.4%
Economic issues	2.4%	3.8%	4.9%	2.3%	3.4%	4.4%	3.0%	2.8%	6.3%	5.7%	5.2%	1.8%
Healthcare	0.6%	3.2%	3.6%	2.6%	3.2%	0.8%	1.5%	2.7%	3.7%	2.7%	5.3%	3.1%
Roads	3.9%	2.5%	1.5%	3.3%	2.8%	2.5%	1.9%	3.0%	1.0%	1.6%	2.5%	1.8%
Drug abuse/addiction	4.3%	2.5%	2.1%	1.3%	2.0%	3.3%	3.1%	1.8%	3.8%	1.1%	1.4%	3.4%
Education concerns	1.8%	4.2%	1.8%	0.3%	2.1%	2.1%	2.3%	2.1%	2.1%	3.8%	4.9%	3.4%
Public safety/security	0.7%	4.5%	1.3%	0.4%	1.8%	2.1%	3.3%	2.2%	0.9%	4.6%	6.3%	0.9%
Lack of diversity	4.8%	2.2%	2.7%	0.7%	1.8%	3.4%	3.0%	1.9%	2.4%	1.5%	1.6%	1.8%
Developing too fast/too much building	0.0%	0.4%	1.0%	4.3%	2.1%	0.3%	0.6%	2.2%	0.6%	0.0%	0.3%	1.3%
Floods	4.1%	1.3%	1.2%	2.2%	1.9%	1.1%	1.3%	1.8%	2.2%	0.4%	0.6%	0.6%
Lack of city services	1.1%	1.5%	2.3%	1.7%	1.9%	1.6%	1.0%	1.9%	1.0%	3.2%	1.9%	3.8%
Need more stores/retail	2.8%	3.0%	0.6%	0.9%	1.8%	1.8%	1.7%	1.7%	1.7%	1.5%	3.6%	1.5%
Lack of recreation/activities	1.9%	2.7%	1.0%	0.7%	1.5%	0.8%	1.6%	1.5%	1.7%	1.9%	2.6%	2.1%
Noise pollution	0.8%	1.6%	2.9%	0.4%	1.2%	1.6%	2.8%	1.6%	0.4%	4.8%	2.3%	5.0%
Racism	2.5%	2.0%	1.2%	0.6%	1.1%	2.6%	2.7%	1.2%	2.2%	0.9%	1.5%	1.5%
Base	**266**	**958**	**611**	**462**	**1482**	**357**	**729**	**1927**	**370**	**278**	**386**	**196**

TOP 2 CHALLENGES FACING LOCAL COMMUNITY (UNAIDED)

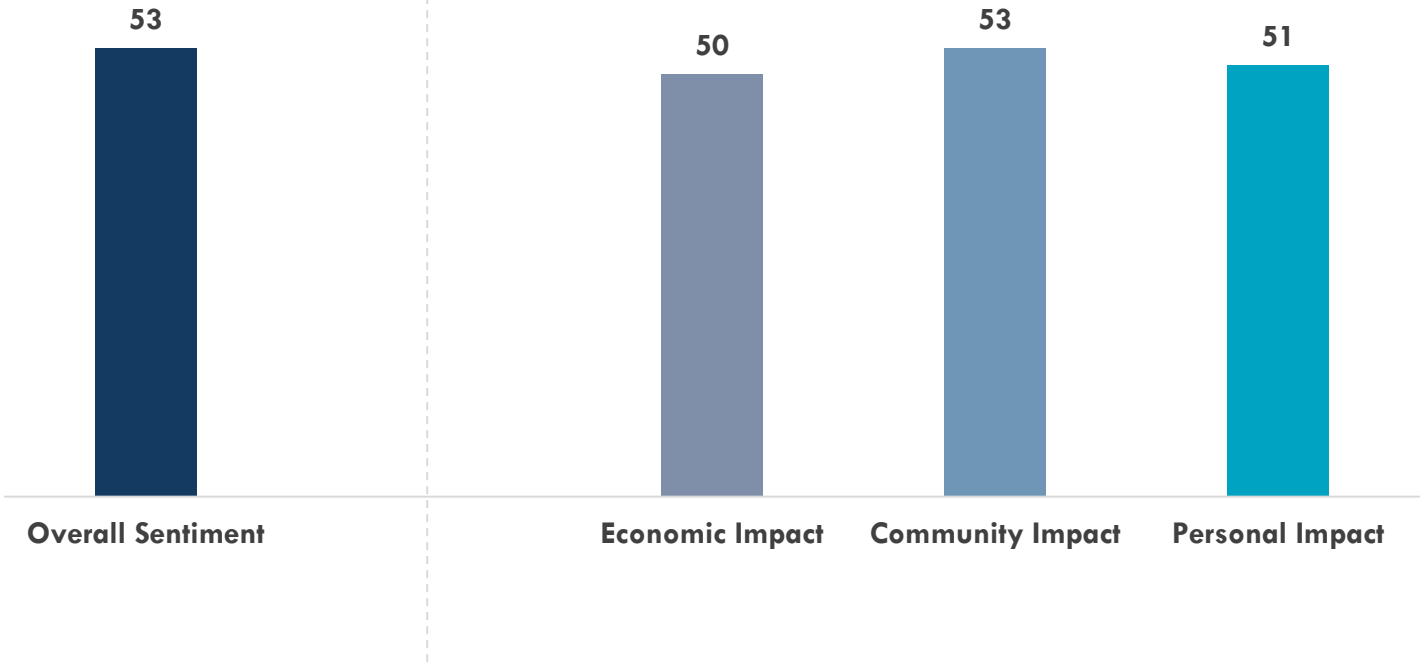
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Affordable housing	16.7%	30.5%	30.9%	25.1%	26.5%
High cost of living	22.4%	24.8%	27.0%	21.6%	28.3%
Homeless people	17.2%	20.7%	27.3%	21.0%	24.4%
Water concerns	7.3%	13.7%	15.9%	12.5%	14.2%
Job concerns/low paying jobs	9.4%	10.8%	6.7%	7.9%	8.0%
Crime/growing crime rate	9.8%	6.3%	4.3%	6.1%	5.6%
Weather/climate	9.2%	3.5%	3.5%	6.8%	4.1%
Traffic	5.3%	7.4%	3.8%	5.5%	4.8%
Too many people/crowded	5.4%	4.4%	4.5%	3.9%	6.7%
Political issues/concerns	2.6%	2.1%	4.6%	4.1%	3.2%
Pollution	6.1%	4.1%	2.2%	4.2%	2.4%
Economic issues	2.5%	2.5%	3.2%	3.3%	3.8%
Healthcare	3.3%	1.2%	2.9%	2.6%	3.1%
Roads	2.3%	3.2%	2.7%	2.2%	2.8%
Drug abuse/addiction	2.8%	2.5%	1.9%	2.4%	1.9%
Education concerns	3.3%	1.1%	1.5%	2.3%	2.1%
Public safety/security	4.9%	0.5%	1.2%	2.5%	1.5%
Lack of diversity	2.4%	2.1%	2.0%	2.5%	1.2%
Developing too fast/too much building	0.2%	1.1%	3.0%	0.7%	2.9%
Floods	0.5%	2.6%	2.4%	0.7%	2.2%
Lack of city services	1.9%	0.4%	1.8%	2.2%	1.3%
Need more stores/retail	2.9%	2.3%	1.2%	2.0%	1.4%
Lack of recreation/activities	2.4%	1.9%	1.2%	1.9%	1.2%
Noise pollution	3.6%	1.0%	0.2%	2.6%	0.4%
Racism	1.3%	1.8%	1.2%	1.6%	1.3%
Base	**554**	**372**	**1123**	**1106**	**904**

TRAVEL INDUSTRY PERCEPTIONS

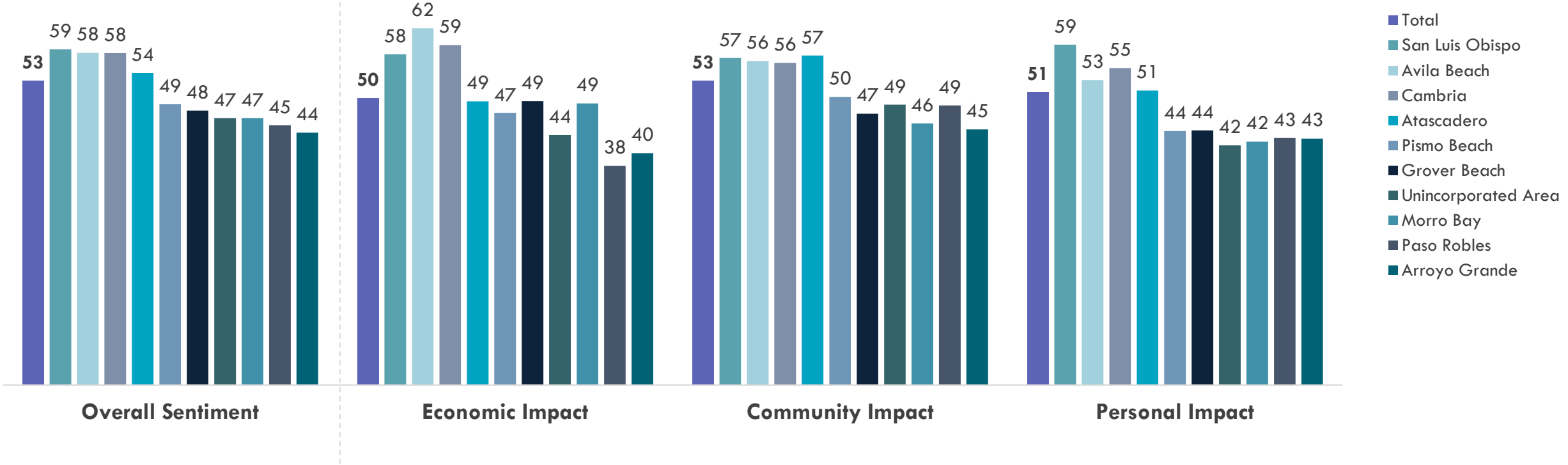
SLO CAL TOURISM INDUSTRY SENTIMENT INDEX

When considering 21 different statements related to the impact of San Luis Obispo County's tourism industry, overall resident sentiment stands at 53 points on a 100-point scale. Perceptions of community impact are most positive, at 53 points among San Luis Obispo County residents, while personal impact came in at 51 points. Sentiment around the economic impact of San Luis Obispo County's tourism industry ranks slightly lower, at 50 points.



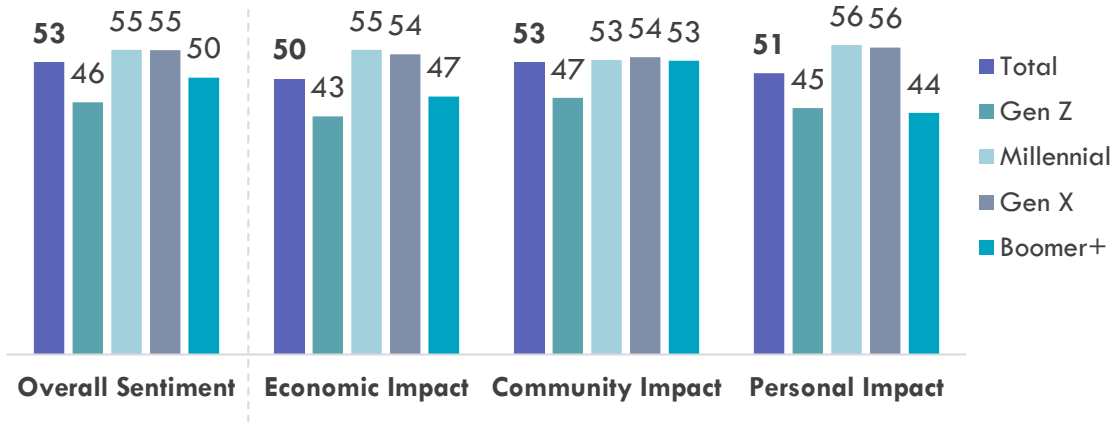
SLO CAL TOURISM INDUSTRY SENTIMENT INDEX

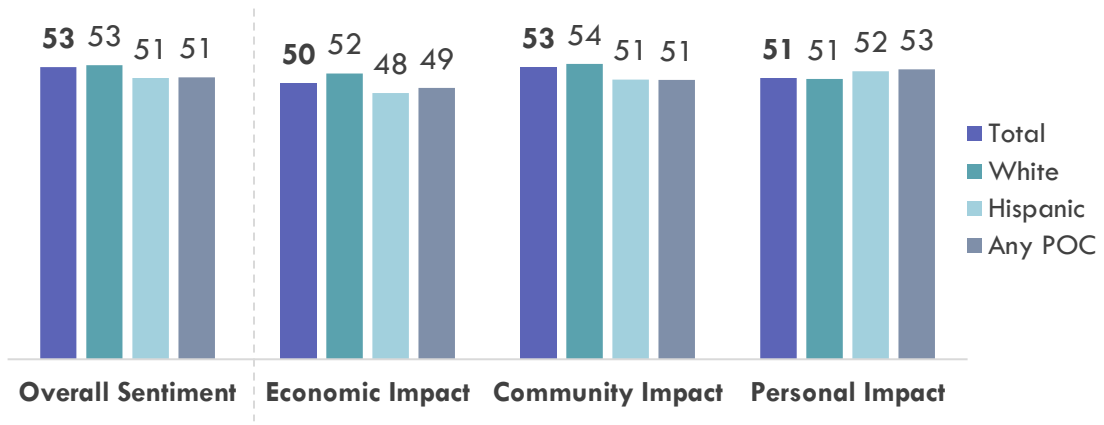
Detail by Resident Community Segment

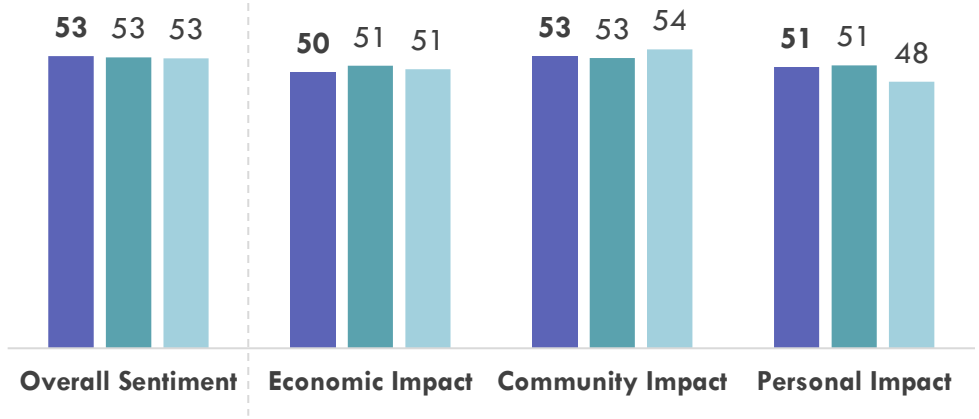


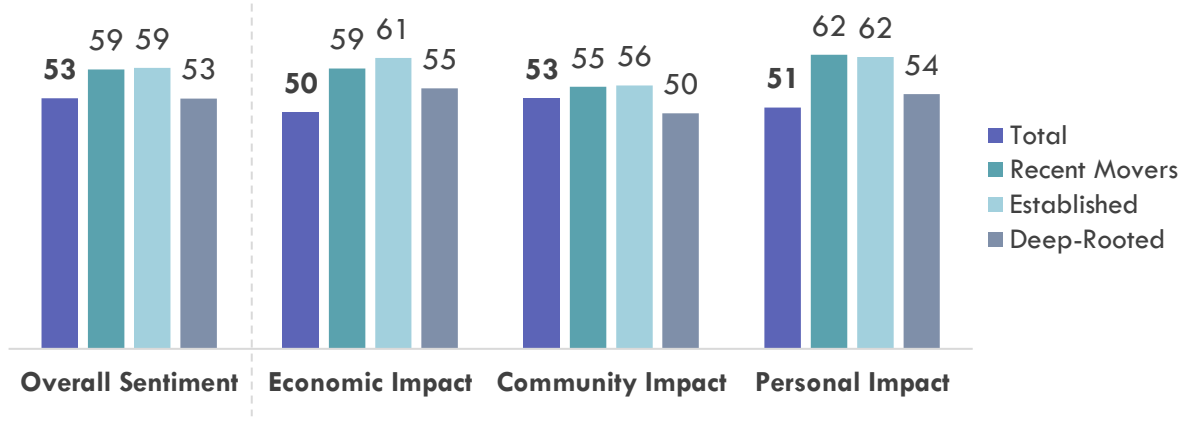
SLO CAL TOURISM INDUSTRY SENTIMENT INDEX

Detail by Demographic Segment



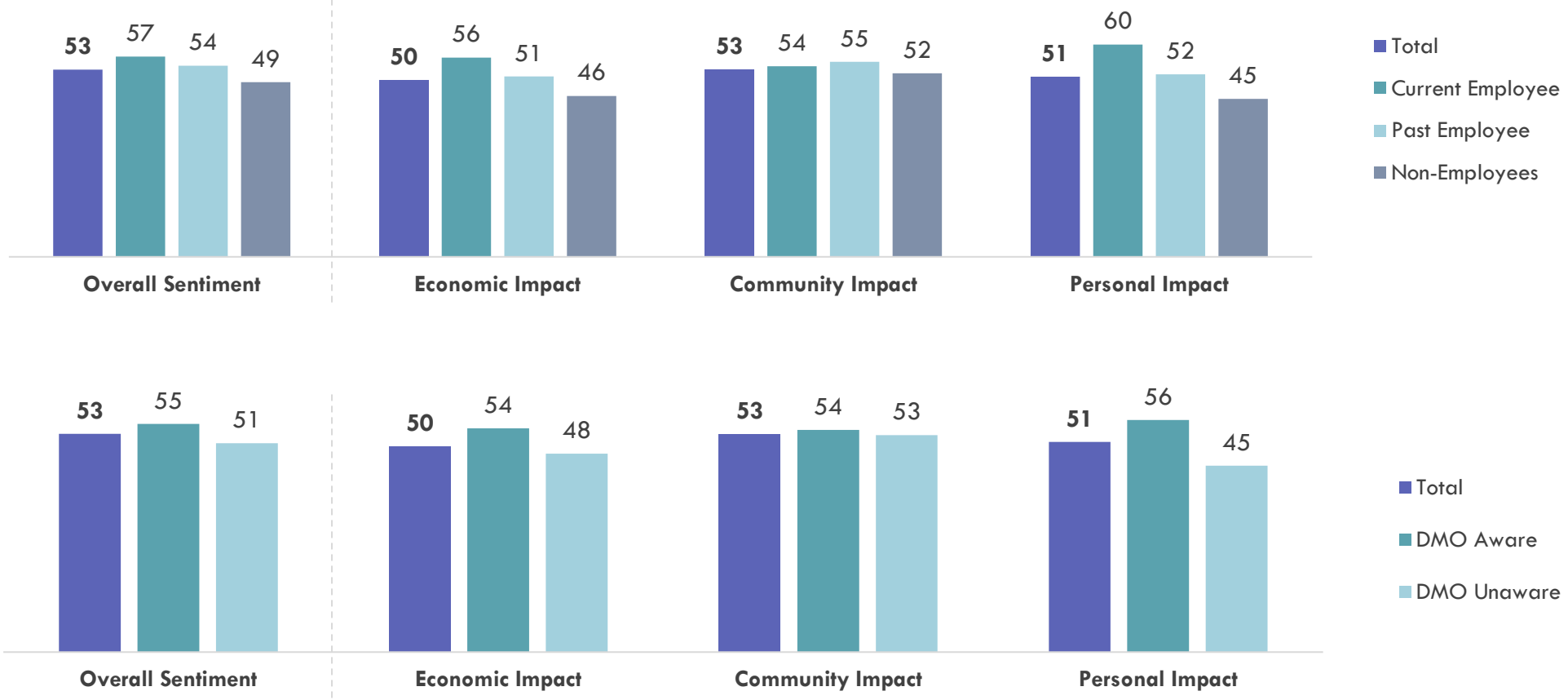






SLO CAL TOURISM INDUSTRY SENTIMENT INDEX

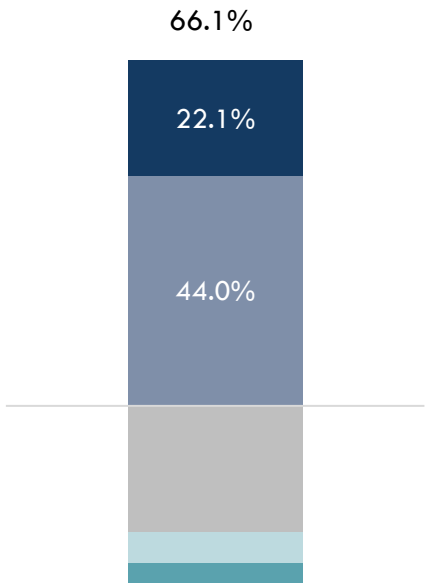
Detail by Industry Segment



SLO CAL TOURISM IMPACT ON COMMUNITY QUALITY OF LIFE

Two-thirds of residents (66.1%) agreed that tourism in their community makes it a better place to live. Conversely, less than half of total California residents (46.7%) agreed with this statement. Of the community segments, Cambria (80.5%) and San Luis Obispo (76.5%) residents had the highest agreement levels, while Paso Robles (51.1%) and non-Cambria/Avila Beach Unincorporated Area (54.3%) residents scored lowest.

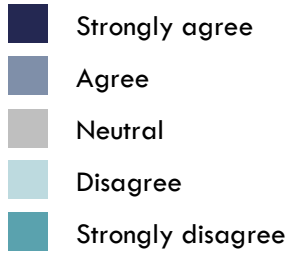
Among the other segments, Recent Movers (86.2%) and Established Families (80.5%) had the highest share of those who agreed with this statement, followed by Current Employees (75.0%), DMO Aware residents (72.3%), Millennials (72.2%), and Gen X (71.3%).



Tourism Makes My Community a Better Place to Live

46.7%

OF ALL CALIFORNIA RESIDENTS AGREE THAT TOURISM MAKES THEIR COMMUNITY A BETTER PLACE TO LIVE



Question: Please rate how much you agree or disagree with the following statement: "I believe tourism in my community makes it a better place in which to live."
Base: All respondents. 2,520 completed surveys.

SLO CAL TOURISM IMPACT ON COMMUNITY QUALITY OF LIFE

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Top 2 Box	**76.5%**	**51.1%**	**58.6%**	**59.4%**	**59.0%**	**60.0%**	**61.5%**	**80.5%**	**71.6%**	**54.3%**
Strongly agree	36.8%	12.9%	12.6%	12.9%	21.2%	11.8%	19.8%	22.6%	12.3%	11.6%
Agree	39.6%	38.1%	46.0%	46.5%	37.8%	48.2%	41.6%	57.9%	59.3%	42.7%
Neutral (neither agree nor disagree)	17.5%	29.2%	32.6%	26.5%	32.9%	31.4%	23.7%	14.6%	18.3%	33.6%
Disagree	3.7%	11.1%	7.4%	6.6%	6.7%	7.0%	8.6%	2.4%	4.8%	9.3%
Strongly disagree	2.3%	8.7%	1.3%	7.5%	1.4%	1.6%	6.2%	2.4%	5.3%	2.8%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SLO CAL TOURISM IMPACT ON COMMUNITY QUALITY OF LIFE

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**54.0%**	**72.2%**	**71.3%**	**59.5%**	**67.8%**	**63.2%**	**60.1%**	**67.0%**	**61.4%**	**86.2%**	**80.5%**	**72.8%**
Strongly agree	13.6%	31.3%	27.3%	11.3%	22.1%	22.9%	24.1%	23.6%	14.0%	36.6%	40.0%	32.4%
Agree	40.4%	40.9%	44.1%	48.2%	45.6%	40.3%	36.0%	43.5%	47.4%	49.6%	40.6%	40.4%
Neutral	37.7%	18.7%	21.0%	28.4%	22.8%	29.1%	29.8%	23.0%	30.1%	10.2%	13.0%	18.9%
Disagree	4.5%	5.8%	5.2%	7.3%	5.9%	5.3%	6.2%	6.3%	5.4%	2.3%	3.4%	5.1%
Strongly disagree	3.8%	3.2%	2.4%	4.8%	3.6%	2.4%	3.8%	3.7%	3.2%	1.3%	3.1%	3.2%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

SLO CAL TOURISM IMPACT ON COMMUNITY QUALITY OF LIFE

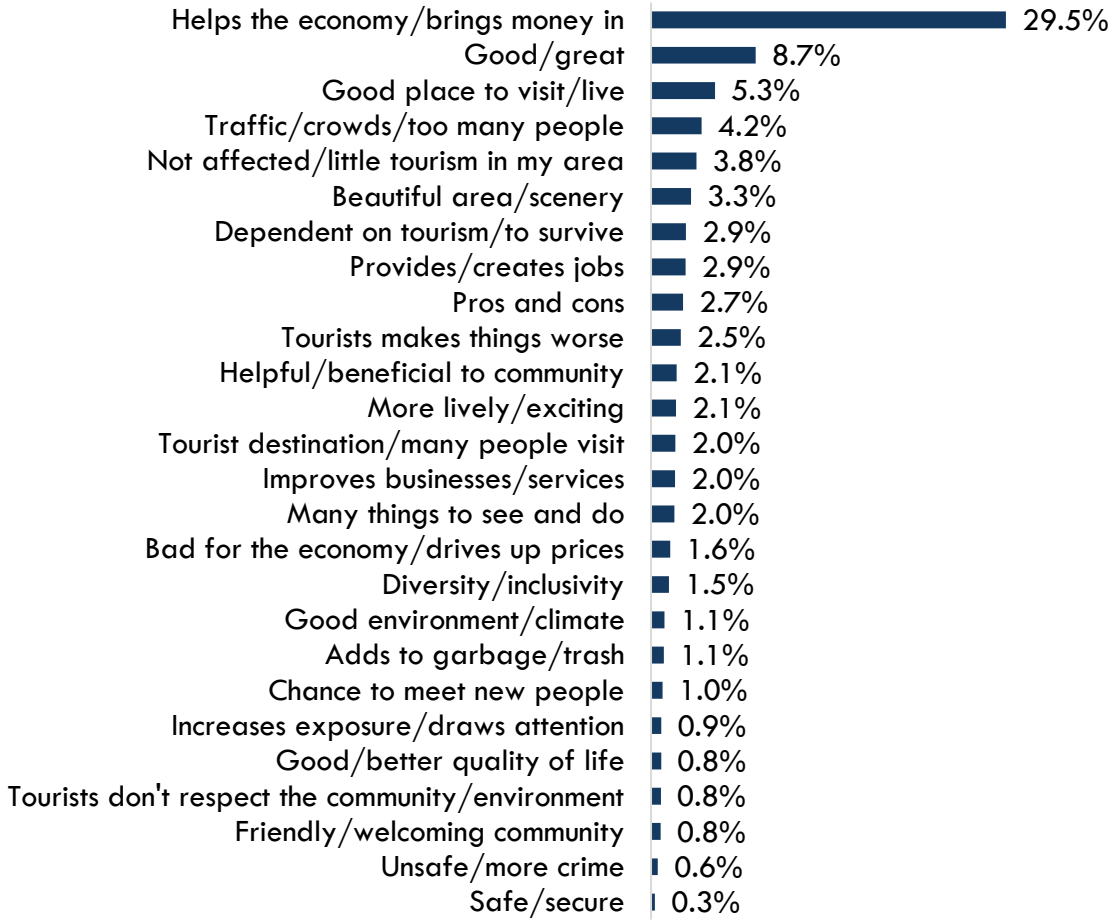
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**75.0%**	**67.7%**	**59.3%**	**72.3%**	**63.4%**
Strongly agree	35.6%	19.4%	13.1%	31.4%	13.9%
Agree	39.3%	48.3%	46.1%	40.9%	49.5%
Neutral (neither agree nor disagree)	20.0%	21.3%	28.9%	19.4%	25.4%
Disagree	2.8%	6.3%	8.0%	5.3%	6.8%
Strongly disagree	2.2%	4.7%	3.8%	2.9%	4.4%
Base	**646**	**388**	**1182**	**1246**	**958**

REASON FOR TOURISM IMPACT AGREEMENT RATING (UNAIDED)

Money and the economy (29.5%) were by far the top drivers of sentiment around tourism's impact and whether residents felt that tourism makes their community a better place to live. Tourism is, in one resident's words, "a necessary evil", since it brings money and income that is needed for the community but also brings issues such as traffic, littering, and is seen by some to increase the cost of goods and services in their communities. Tourism is also seen a good for business, which in terms help to maintain the quality of community life.

In particular, Pismo Beach residents (47.0%) were more likely to cite the economic/monetary benefits of tourism as the reason for their agreement rating for the statement "I believe tourism in my community makes it a better place in which to live."



Question: In a few brief words, please explain why you gave the rating that you did. Base: All respondents. 2,520 completed surveys.

REASON FOR TOURISM IMPACT AGREEMENT RATING (UNAIDED)

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Helps the economy/brings money in	23.2%	23.0%	28.5%	34.7%	40.4%	35.1%	47.0%	31.0%	34.7%	35.0%
Good/great	15.9%	4.8%	5.0%	4.5%	6.0%	3.6%	4.3%	6.5%	4.1%	6.4%
Good place to visit/live	7.6%	5.1%	1.0%	3.0%	4.4%	3.9%	3.9%	3.8%	6.8%	5.6%
Traffic/crowds/too many people	1.8%	7.2%	5.1%	4.7%	2.8%	2.7%	7.1%	5.7%	5.7%	6.0%
Not affected/little tourism in my area	1.7%	2.4%	10.7%	2.0%	1.1%	0.8%	5.2%	3.0%	4.2%	9.0%
Beautiful area/scenery	6.3%	0.6%	2.7%	1.2%	1.1%	3.5%	0.0%	3.6%	2.1%	1.7%
Dependent on tourism/to survive	1.1%	2.4%	3.6%	4.0%	5.5%	8.4%	1.9%	7.9%	0.0%	3.0%
Provides/creates jobs	1.8%	2.4%	6.5%	1.9%	4.0%	1.3%	0.6%	6.2%	2.4%	3.8%
Pros and cons	2.3%	1.5%	3.2%	3.1%	5.6%	2.4%	0.0%	3.9%	0.6%	4.7%
Tourists makes things worse	2.9%	3.6%	1.4%	1.8%	0.0%	5.2%	3.2%	1.2%	2.1%	1.9%
Helpful/beneficial to community	1.4%	0.4%	4.0%	1.4%	0.0%	1.5%	0.0%	6.9%	5.2%	1.9%
More lively/exciting	1.8%	1.1%	1.0%	1.7%	1.0%	0.4%	0.0%	2.2%	12.6%	0.0%
Tourist destination/many people visit	2.2%	3.8%	2.6%	1.1%	5.0%	3.6%	1.3%	0.9%	0.0%	0.8%
Improves businesses/services	2.1%	2.3%	1.2%	2.9%	0.5%	2.0%	0.0%	1.2%	3.4%	2.1%
Many things to see and do	1.8%	5.3%	2.3%	3.5%	1.0%	0.8%	1.1%	0.9%	0.6%	0.5%
Bad for the economy/drives up prices	0.3%	7.4%	2.2%	0.5%	0.5%	0.0%	3.2%	0.0%	1.2%	2.5%
Diversity/inclusivity	1.9%	3.4%	1.0%	0.9%	0.5%	2.4%	0.6%	1.3%	0.0%	0.9%
Good environment/climate	2.1%	0.0%	1.0%	0.9%	0.5%	0.8%	1.9%	0.7%	0.6%	0.4%
Adds to garbage/trash	0.9%	0.2%	0.0%	2.6%	6.3%	1.6%	1.3%	0.7%	0.0%	0.8%
Chance to meet new people	0.9%	0.4%	0.5%	5.0%	1.1%	0.8%	0.6%	0.3%	0.0%	0.0%
Increases exposure/draws attention	1.6%	1.5%	0.9%	0.0%	0.0%	0.0%	1.3%	0.0%	0.3%	0.0%
Good/better quality of life	1.6%	0.0%	0.0%	0.9%	1.1%	0.4%	0.6%	0.9%	0.6%	0.4%
Tourists don't respect the community/environment	0.3%	0.0%	0.5%	0.9%	0.0%	3.2%	0.0%	0.0%	4.0%	1.1%
Friendly/welcoming community	1.1%	0.9%	0.5%	0.5%	0.0%	1.2%	1.1%	1.3%	0.3%	0.4%
Unsafe/more crime	0.5%	2.0%	0.0%	0.7%	0.0%	1.6%	1.3%	0.0%	0.0%	0.0%
Safe/secure	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Base	**888**	**228**	**186**	**179**	**93**	**123**	**88**	**148**	**148**	**239**

**Excluding residents of Avila Beach and Cambria*

REASON FOR TOURISM IMPACT AGREEMENT RATING (UNAIDED)

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Helps the economy/brings money in	19.0%	23.0%	30.7%	37.4%	30.4%	25.0%	25.1%	28.8%	33.4%	17.4%	19.0%	26.8%
Good/great	7.3%	15.6%	8.7%	2.2%	9.0%	8.8%	8.6%	9.4%	5.0%	22.2%	18.0%	12.1%
Good place to visit/live	7.5%	8.4%	5.7%	1.7%	5.3%	7.5%	6.0%	5.9%	2.1%	11.6%	7.9%	8.8%
Traffic/crowds/too many people	2.4%	2.5%	3.3%	6.9%	4.3%	1.8%	3.0%	4.3%	3.5%	1.1%	2.0%	4.0%
Not affected/little tourism in my area	8.6%	2.1%	2.8%	5.1%	3.8%	3.2%	3.7%	3.2%	6.8%	1.0%	1.6%	3.1%
Beautiful area/scenery	4.3%	5.1%	4.7%	0.6%	3.3%	3.9%	3.8%	3.7%	1.6%	6.9%	7.5%	3.5%
Dependent on tourism/to survive	1.2%	2.2%	2.5%	4.2%	3.1%	1.8%	1.4%	3.1%	2.2%	3.3%	1.3%	3.2%
Provides/creates jobs	1.4%	1.5%	3.4%	4.3%	3.1%	0.8%	1.3%	2.7%	4.0%	2.0%	3.4%	2.8%
Pros and cons	3.4%	1.9%	2.0%	3.7%	2.6%	2.2%	3.4%	2.7%	2.3%	1.2%	0.6%	0.6%
Tourists makes things worse	2.8%	2.5%	2.4%	2.5%	2.2%	2.9%	4.2%	2.2%	4.0%	0.6%	1.5%	2.5%
Helpful/beneficial to community	1.7%	1.4%	1.8%	3.2%	2.2%	1.8%	1.6%	1.8%	3.8%	1.9%	2.6%	0.3%
More lively/exciting	2.8%	1.4%	1.9%	2.7%	2.0%	3.6%	2.7%	1.7%	4.0%	0.8%	3.3%	1.7%
Tourist destination/many people visit	3.7%	1.4%	2.7%	1.9%	1.9%	3.2%	2.2%	2.1%	1.6%	1.7%	1.4%	2.8%
Improves businesses/services	2.0%	1.5%	1.7%	2.6%	2.2%	0.3%	0.7%	2.1%	1.4%	1.5%	2.5%	2.1%
Many things to see and do	2.5%	1.1%	2.2%	2.5%	1.8%	2.1%	2.2%	2.1%	1.1%	2.4%	1.8%	1.3%
Bad for the economy/drives up prices	2.9%	1.3%	1.4%	1.7%	1.6%	2.1%	1.8%	1.5%	2.0%	0.4%	0.8%	1.3%
Diversity/inclusivity	1.9%	1.9%	2.1%	0.6%	1.5%	2.1%	1.7%	1.2%	3.1%	2.2%	1.0%	1.6%
Good environment/climate	1.2%	1.9%	1.5%	0.1%	1.2%	0.8%	0.8%	1.0%	1.5%	2.7%	3.3%	0.0%
Adds to garbage/trash	0.6%	1.0%	1.8%	0.7%	1.2%	0.5%	0.4%	1.1%	1.0%	0.6%	2.2%	1.3%
Chance to meet new people	0.8%	1.2%	0.2%	1.2%	1.0%	2.1%	1.2%	1.1%	0.2%	1.5%	0.6%	0.6%
Increases exposure/draws attention	2.0%	1.4%	0.5%	0.3%	0.8%	1.8%	1.2%	0.9%	0.6%	1.5%	0.7%	1.9%
Good/better quality of life	0.0%	1.7%	1.1%	0.0%	0.9%	0.3%	0.4%	0.9%	0.3%	2.2%	1.6%	2.8%
Tourists don't respect the community/environment	0.3%	0.9%	0.9%	0.8%	0.9%	0.3%	0.3%	0.7%	1.5%	0.0%	0.6%	0.0%
Friendly/welcoming community	1.4%	1.5%	0.5%	0.1%	0.6%	2.0%	1.8%	0.8%	0.8%	1.5%	1.4%	0.3%
Unsafe/more crime	0.5%	0.8%	0.3%	0.6%	0.6%	0.8%	0.8%	0.5%	0.8%	0.6%	0.0%	0.0%
Safe/secure	0.0%	0.8%	0.3%	0.0%	0.3%	1.3%	0.8%	0.3%	0.7%	0.9%	0.7%	0.0%
Base	**251**	**1003**	**606**	**460**	**1531**	**356**	**709**	**1948**	**372**	**283**	**410**	**190**

REASON FOR TOURISM IMPACT AGREEMENT RATING (UNAIDED)

Detail by Industry Segment

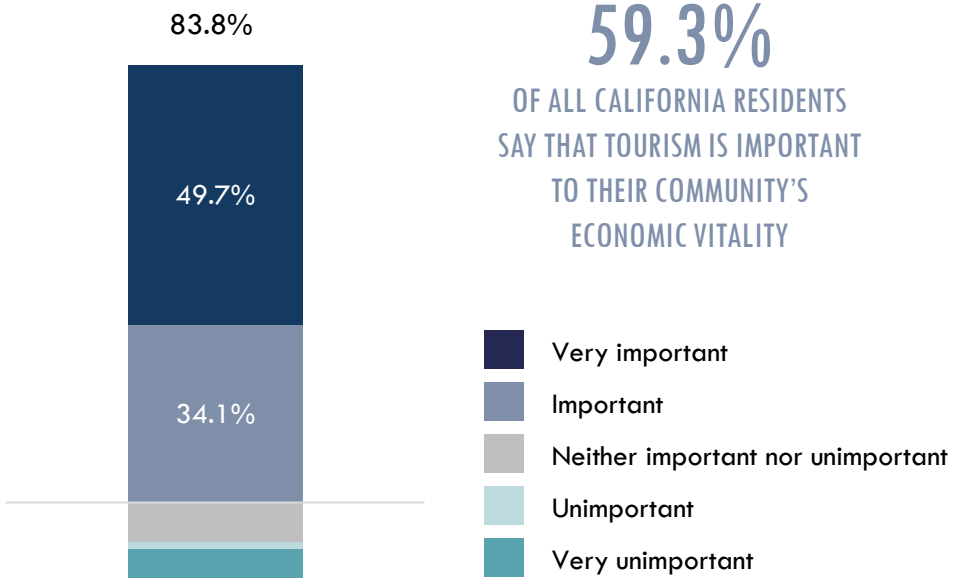
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Helps the economy/brings money in	22.4%	29.2%	35.3%	24.7%	34.4%
Good/great	15.0%	6.0%	4.0%	13.2%	4.8%
Good place to visit/live	9.8%	5.6%	3.2%	7.2%	3.4%
Traffic/crowds/too many people	2.4%	3.9%	5.4%	3.9%	5.0%
Not affected/little tourism in my area	1.2%	3.2%	5.0%	2.3%	5.3%
Beautiful area/scenery	6.8%	2.8%	1.7%	4.6%	2.3%
Dependent on tourism/to survive	2.8%	3.1%	3.1%	3.2%	2.8%
Provides/creates jobs	1.7%	3.1%	3.5%	2.4%	3.2%
Pros and cons	1.8%	2.2%	3.3%	2.3%	2.4%
Tourists makes things worse	1.4%	3.9%	2.6%	2.1%	3.0%
Helpful/beneficial to community	1.0%	5.1%	1.8%	1.9%	2.9%
More lively/exciting	1.2%	2.4%	2.5%	2.0%	2.3%
Tourist destination/many people visit	1.9%	3.3%	1.8%	2.3%	1.8%
Improves businesses/services	1.0%	3.2%	1.9%	1.9%	2.3%
Many things to see and do	1.5%	1.3%	2.5%	1.9%	1.7%
Bad for the economy/drives up prices	1.0%	2.5%	1.8%	1.4%	1.4%
Diversity/inclusivity	2.6%	1.1%	1.3%	1.5%	1.7%
Good environment/climate	1.7%	0.4%	0.5%	1.6%	0.6%
Adds to garbage/trash	0.4%	1.6%	1.3%	1.2%	0.9%
Chance to meet new people	0.3%	0.8%	1.1%	0.5%	1.7%
Increases exposure/draws attention	2.3%	1.1%	0.2%	1.2%	0.4%
Good/better quality of life	2.2%	1.0%	0.2%	1.6%	0.3%
Tourists don't respect the community/environment	1.0%	1.8%	0.6%	0.7%	0.7%
Friendly/welcoming community	1.3%	0.8%	0.4%	1.0%	0.3%
Unsafe/more crime	0.3%	0.5%	0.7%	0.5%	0.7%
Safe/secure	0.3%	0.5%	0.2%	0.3%	0.4%
Base	**575**	**369**	**1116**	**1145**	**895**

TOURISM'S IMPORTANCE TO SLO CAL ECONOMIC VITALITY

Over eight in ten (83.8%) residents said that tourism is important or very important to the vitality of San Luis Obispo County's economy. In fact, nearly half (49.7%) said tourism is very important. This is markedly higher than the share of California residents who said that tourism is important to their community's economic vitality (+24.5pp).

While across the segments the share of respondents who said tourism is important or very important never dips below 70 percent, sentiment is lowest among Paso Robles (72.2%) and non-Cambria/Avila Beach Unincorporated Area (76.6%) residents, as well as Gen Z (71.3%).

On the other hand, Cambria (93.6%) and San Luis Obispo (87.0%) residents had the highest sentiment among the community segments. Additionally, Established Families (90.6%), Recent Movers (89.9%), DMO Aware (881.%) Gen X (87.4%), and White/Caucasian residents (85.2%) also had significantly higher shares of respondents who rated tourism as important or very important to the county's economic health.



Tourism's Importance to SLO CAL's Economic Vitality

Question: In your opinion, how important is the tourism industry to the vitality of San Luis Obispo County's economy?
Base: All respondents. 2,520 completed surveys.

TOURISM'S IMPORTANCE TO SLO CAL ECONOMIC VITALITY

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Top 2 Box	**87.0%**	**72.2%**	**85.2%**	**79.7%**	**81.4%**	**87.5%**	**79.8%**	**93.6%**	**89.6%**	**76.6%**
Strongly agree	57.0%	36.3%	51.0%	43.7%	50.5%	45.2%	44.5%	57.7%	47.1%	43.5%
Agree	30.1%	35.9%	34.3%	36.0%	30.9%	42.3%	35.3%	35.9%	42.4%	33.1%
Neutral (neither agree nor disagree)	6.3%	12.6%	9.0%	6.1%	9.2%	6.2%	6.0%	3.4%	6.4%	10.9%
Disagree	0.9%	4.7%	0.5%	0.9%	0.5%	1.1%	3.3%	0.8%	0.5%	1.3%
Strongly disagree	3.6%	8.4%	3.5%	12.5%	8.5%	4.8%	8.0%	1.6%	2.0%	8.3%
I don't know	2.0%	2.0%	1.8%	0.9%	0.5%	0.3%	2.8%	0.6%	1.5%	2.9%
Base	**979**	**240**	**203**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

TOURISM'S IMPORTANCE TO SLO CAL ECONOMIC VITALITY

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**71.3%**	**85.5%**	**87.4%**	**82.6%**	**85.2%**	**79.7%**	**77.0%**	**84.2%**	**81.1%**	**89.9%**	**90.6%**	**87.7%**
Strongly agree	28.9%	54.9%	56.4%	45.1%	50.9%	48.4%	45.2%	50.9%	43.1%	60.1%	63.9%	62.7%
Agree	42.3%	30.7%	31.0%	37.4%	34.3%	31.3%	31.8%	33.3%	38.0%	29.8%	26.7%	25.0%
Neutral (neither agree nor disagree)	17.9%	7.4%	5.5%	6.7%	6.5%	10.6%	12.9%	7.5%	8.3%	4.7%	4.4%	6.6%
Disagree	3.8%	1.4%	1.5%	0.7%	1.0%	2.4%	3.1%	1.1%	2.4%	1.6%	1.3%	1.7%
Strongly disagree	4.5%	3.7%	4.0%	8.7%	5.5%	5.1%	5.5%	5.6%	5.4%	3.1%	2.4%	1.7%
I don't know	2.5%	2.0%	1.6%	1.4%	1.7%	2.2%	1.6%	1.5%	2.9%	0.6%	1.3%	2.3%
Base	**297**	**1107**	**640**	**475**	**1637**	**389**	**787**	**2121**	**398**	**318**	**453**	**209**

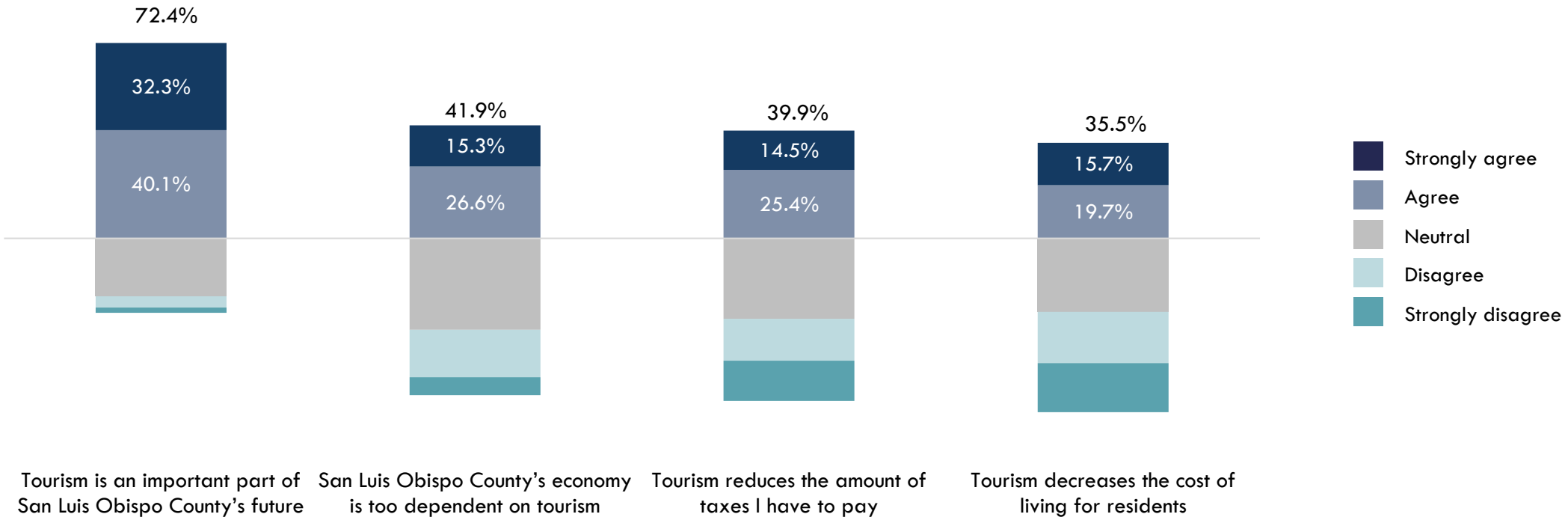
TOURISM'S IMPORTANCE TO SLO CAL ECONOMIC VITALITY

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**86.0%**	**88.3%**	**80.9%**	**88.1%**	**81.3%**
Strongly agree	56.7%	53.5%	43.2%	57.8%	44.1%
Agree	29.3%	34.8%	37.6%	30.2%	37.1%
Neutral (neither agree nor disagree)	6.5%	5.6%	9.1%	4.9%	9.0%
Disagree	2.0%	1.3%	1.2%	0.9%	1.6%
Strongly disagree	4.2%	3.9%	6.6%	4.9%	6.7%
I don't know	1.3%	0.9%	2.3%	1.2%	1.4%
Base	**645**	**388**	**1182**	**1245**	**958**

TOURISM INDUSTRY IMPACT ON ECONOMY

Nearly three-fourths of residents agreed that tourism is an important part of San Luis Obispo County's future (72.4%). At the same time, four in ten (41.9%) said San Luis Obispo County's economy is too dependent on tourism. Residents were also less likely to perceive the personal economic benefits of tourism, with only 39.9 percent agreeing that tourism reduces the amount of taxes they have to pay, and 35.5 agreeing that tourism decreases the cost of living for residents. Current Employees and DMO Aware residents were significantly more likely to agree that tourism reduces taxes and the cost of living for residents, as were Recent Movers and Established Families and Millennials and Gen X residents, the two generations who comprise the bulk of the workforce age range. In terms of community segments, San Luis Obispo, Cambria, and Avila Beach residents were most likely to agree with these two cost-related statements, while Paso Robles, Arroyo Grande, and non-Cambria/Avila Beach Unincorporated Area residents were least likely.



Question: Thinking about San Luis Obispo County's tourism industry and its impact on the economy, please rate how much you agree with the following statements. Base: All respondents. 2,520 completed surveys.

TOURISM INDUSTRY IMPACT ON ECONOMY

Detail by Resident Community Segment

Top 2 Box	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Tourism is an important part of San Luis Obispo County's future	75.0%	62.3%	71.7%	67.7%	74.5%	67.2%	74.6%	78.9%	82.2%	69.4%
San Luis Obispo County's economy is too dependent on tourism	47.4%	39.1%	30.9%	31.5%	49.9%	33.7%	37.5%	52.2%	59.2%	30.9%
Tourism reduces the amount of taxes I have to pay	52.9%	22.3%	35.6%	15.3%	38.5%	35.7%	35.5%	49.0%	62.4%	23.1%
Tourism decreases the cost of living for residents	49.5%	14.1%	27.4%	14.7%	26.5%	29.1%	26.5%	49.0%	60.1%	20.5%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

TOURISM INDUSTRY IMPACT ON ECONOMY

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
Top 2 Box	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Tourism is an important part of San Luis Obispo County's future	56.3%	72.2%	78.3%	73.0%	73.8%	65.1%	67.5%	72.1%	74.5%	78.3%	78.6%	73.5%
San Luis Obispo County's economy is too dependent on tourism	33.3%	49.3%	47.0%	33.2%	42.0%	39.4%	41.7%	41.4%	45.3%	50.3%	56.6%	56.1%
Tourism reduces the amount of taxes I have to pay	29.6%	49.8%	45.3%	28.6%	40.1%	38.4%	40.8%	39.8%	40.3%	56.4%	60.8%	49.1%
Tourism decreases the cost of living for residents	30.9%	48.4%	41.3%	19.6%	35.8%	31.8%	36.2%	35.4%	36.2%	55.0%	59.0%	45.1%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

TOURISM INDUSTRY IMPACT ON ECONOMY

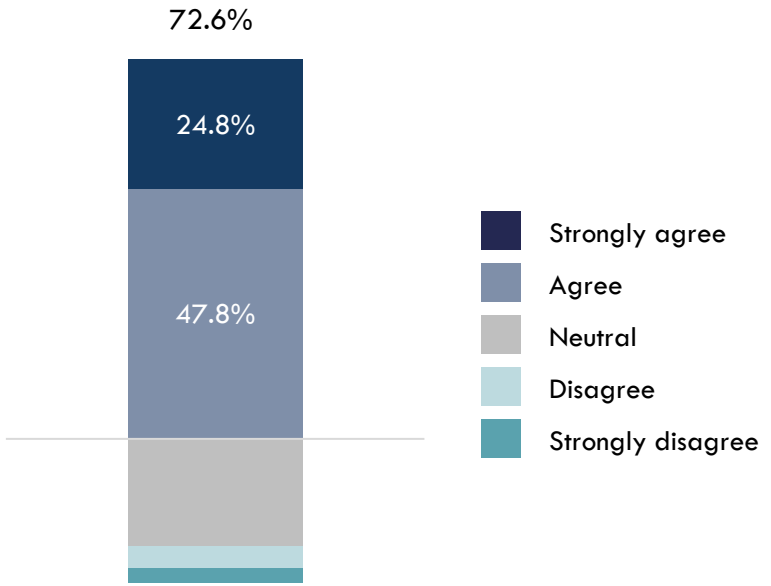
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
Top 2 Box	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Tourism is an important part of San Luis Obispo County's future	74.5%	77.0%	69.7%	76.3%	69.6%
San Luis Obispo County's economy is too dependent on tourism	48.2%	44.7%	35.3%	48.3%	36.5%
Tourism reduces the amount of taxes I have to pay	52.3%	36.1%	31.3%	46.4%	36.1%
Tourism decreases the cost of living for residents	50.0%	31.9%	25.6%	42.5%	31.4%
Base	**646**	**388**	**1182**	**1246**	**958**

ECONOMIC IMPACT AWARENESS

When shown the statement "The taxes generated by tourism in the county save each household more than $1,700 per year", the majority of residents (72.6%) agreed or strongly agreed that this increased their appreciation of tourism in the county. Only 7.0 percent disagreed, while one in five (20.5%) remained undecided or uncertain.

Agreement was highest among Recent Movers (84.9%) and Established Families (83.8%), as well as Avila Beach (83.8%) and San Luis Obispo (83.3%) residents. On the other hand, Paso Robles (56.0%) and non-Cambria/Avila Beach Unincorporated Area (57.8%) had the lowest agreement levels. Paso Robles residents were most likely to disagree (16.1%), while non-Cambria/Avila Beach Unincorporated Area residents had the highest share of residents who remained undecided (31.6%).



Knowing the economic impact of tourism increases my appreciation for tourism in SLO CAL

Question: The taxes generated by tourism in the county save each household more than $1,700 per year. With this piece of information in mind, please share how much you agree with the following statement: "Knowing this fact makes me appreciate tourism in San Luis Obispo County more." Base: All respondents. 2,520 completed surveys.

ECONOMIC IMPACT AWARENESS

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Top 2 Box	**83.3%**	**56.0%**	**75.1%**	**66.5%**	**62.0%**	**63.7%**	**65.3%**	**75.4%**	**84.8%**	**57.8%**
Strongly agree	36.1%	15.3%	21.4%	21.2%	22.2%	18.3%	19.3%	23.3%	19.7%	13.5%
Agree	47.2%	40.7%	53.7%	45.3%	39.8%	45.4%	46.0%	52.1%	65.1%	44.3%
Undecided/uncertain	13.1%	27.8%	19.6%	27.6%	29.2%	30.3%	26.0%	13.1%	12.6%	31.6%
Disagree	2.9%	9.7%	4.0%	2.3%	7.8%	5.2%	5.8%	4.3%	0.3%	5.5%
Strongly disagree	0.7%	6.4%	1.3%	3.7%	1.0%	0.7%	3.0%	7.2%	2.4%	5.1%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

ECONOMIC IMPACT AWARENESS

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**66.3%**	**79.4%**	**75.9%**	**64.8%**	**74.2%**	**66.9%**	**67.7%**	**72.5%**	**72.9%**	**84.9%**	**83.8%**	**81.0%**
Strongly agree	23.2%	31.1%	25.3%	18.1%	25.2%	27.3%	25.4%	25.7%	19.4%	36.5%	38.0%	33.2%
Agree	43.1%	48.3%	50.6%	46.7%	49.0%	39.6%	42.3%	46.8%	53.5%	48.4%	45.8%	47.8%
Undecided/uncertain	27.5%	15.4%	17.7%	25.9%	19.2%	25.2%	24.5%	20.3%	21.8%	10.7%	10.3%	12.1%
Disagree	4.8%	3.5%	4.3%	4.9%	4.2%	4.2%	4.4%	4.4%	3.7%	2.4%	4.4%	6.3%
Strongly disagree	1.5%	1.7%	2.1%	4.4%	2.4%	3.6%	3.3%	2.9%	1.5%	1.9%	1.5%	0.6%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

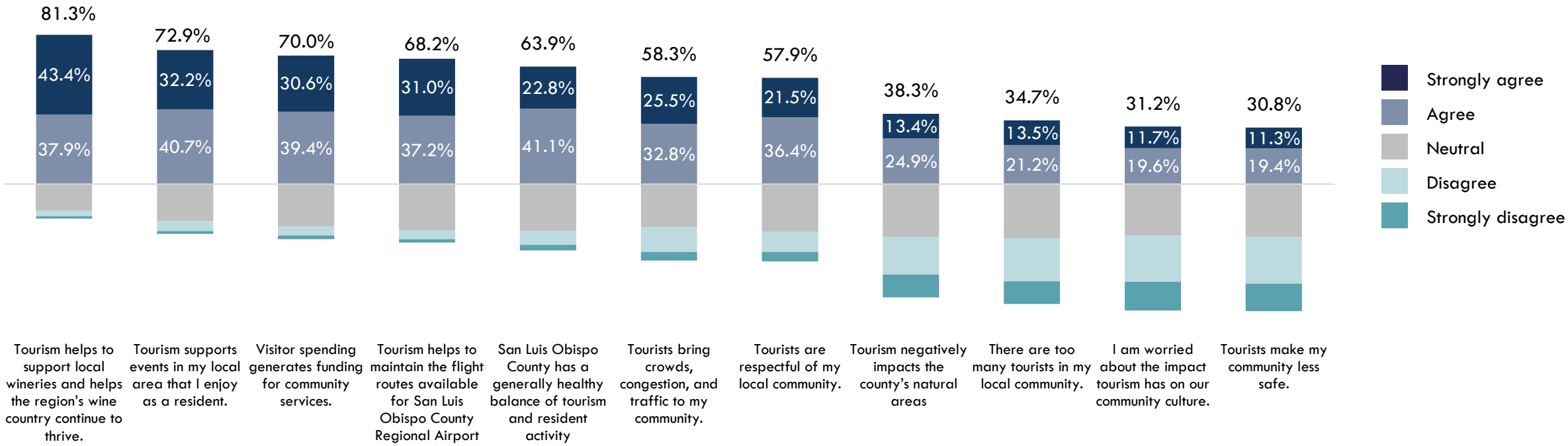
ECONOMIC IMPACT AWARENESS

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**79.4%**	**77.9%**	**65.7%**	**77.3%**	**70.6%**
Strongly agree	34.9%	25.2%	17.1%	31.1%	18.8%
Agree	44.5%	52.7%	48.6%	46.2%	51.8%
Undecided/uncertain	16.0%	14.9%	26.0%	16.2%	22.4%
Disagree	4.1%	3.6%	4.8%	4.2%	3.8%
Strongly disagree	0.5%	3.5%	3.5%	2.3%	3.3%
Base	**646**	**388**	**1182**	**1246**	**958**

TOURISM INDUSTRY IMPACT ON COMMUNITY

When considering the impact of tourism on San Luis Obispo County's communities, the largest share of residents agreed that tourism helps support local wineries (81.3%), followed by over seven in ten who agreed that tourism supports local events that residents can enjoy (72.9%) and/or that visitor spending generates funding for community services (70.0%). At the same time, 58.3 percent agreed that tourism bring crowds, congestion, and traffic to their community, but only about one-third agreed that tourism negatively impacts the county's natural areas (38.3%), that there are too many tourists in their community (34.7%), that they are concerned about tourism's impact on community culture (31.2%), and/or that tourists make their community less safe (30.8%). Avila Beach residents (71.6%) were significantly more likely to agree that tourism brings crowds, congestion, and traffic to their community, while Established Families and DMO Aware residents were significantly more likely to agree that there are too many tourists in their community, that they are concerned about tourism's impact on community culture, and/or that tourists make their community less safe.



Question: Thinking about San Luis Obispo County's tourism industry and its impact on the economy, please rate how much you agree with the following statements. Base: All respondents. 2,520 completed surveys.

TOURISM INDUSTRY IMPACT ON COMMUNITY

Detail by Resident Community Segment

Top 2 Box	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Tourism helps to support local wineries and helps the region's wine country continue to thrive.	80.4%	80.6%	89.2%	72.4%	78.9%	71.0%	80.2%	83.1%	89.7%	85.2%
Tourism supports events in my local area that I enjoy as a resident.	77.3%	69.7%	79.3%	66.3%	65.5%	63.6%	68.8%	75.0%	68.4%	71.9%
Visitor spending generates funding for community services.	73.8%	53.2%	76.9%	61.9%	62.4%	70.2%	72.4%	77.6%	88.6%	60.0%
Tourism helps to maintain the flight routes available for San Luis Obispo County Regional Airport	75.7%	60.6%	67.4%	60.3%	74.0%	62.6%	69.2%	58.2%	54.5%	72.7%
San Luis Obispo County has a generally healthy balance of tourism and resident activity	72.6%	53.2%	63.1%	58.6%	57.2%	50.2%	51.2%	72.1%	78.2%	50.3%
Tourists are respectful of my local community.	72.2%	49.9%	56.9%	43.9%	41.2%	48.1%	39.1%	60.0%	64.9%	43.5%
Tourists bring crowds, congestion, and traffic to my community.	55.0%	58.5%	49.5%	62.8%	60.3%	53.5%	67.7%	60.5%	71.6%	60.9%
Tourism negatively impacts the county's natural areas	39.4%	35.9%	31.9%	42.8%	48.5%	39.2%	31.3%	36.8%	30.7%	41.7%
There are too many tourists in my local community.	38.3%	33.5%	20.2%	30.5%	36.4%	31.4%	36.3%	42.4%	50.0%	26.3%
I am worried about the impact tourism has on our community culture.	34.5%	34.9%	15.6%	30.2%	31.7%	29.9%	25.1%	40.6%	29.6%	29.7%
Tourists make my community less safe.	35.5%	25.9%	19.1%	36.2%	40.4%	29.9%	19.2%	29.3%	31.6%	26.6%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

TOURISM INDUSTRY IMPACT ON COMMUNITY

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
Top 2 Box	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Tourism helps to support local wineries and helps the region's wine country continue to thrive.	64.3%	77.1%	84.6%	87.6%	82.8%	70.5%	73.1%	80.8%	83.6%	76.0%	80.7%	81.5%
Tourism supports events in my local area that I enjoy as a resident.	68.0%	74.2%	76.7%	70.3%	73.6%	71.1%	70.9%	73.3%	70.6%	78.0%	78.2%	76.5%
Visitor spending generates funding for community services.	59.3%	69.4%	74.9%	70.3%	70.9%	66.6%	66.7%	69.8%	71.4%	74.9%	75.2%	72.0%
Tourism helps to maintain the flight routes available for San Luis Obispo County Regional Airport	54.5%	69.4%	72.0%	67.6%	70.2%	56.8%	59.1%	68.8%	64.4%	74.7%	70.8%	66.9%
San Luis Obispo County has a generally healthy balance of tourism and resident activity	57.7%	68.1%	68.6%	58.0%	64.5%	64.6%	64.5%	63.8%	64.3%	73.7%	72.7%	64.2%
Tourists are respectful of my local community.	53.5%	66.3%	61.2%	47.9%	58.2%	57.7%	59.8%	58.8%	52.9%	72.5%	73.7%	63.6%
Tourists bring crowds, congestion, and traffic to my community.	53.6%	56.9%	59.0%	60.5%	58.9%	52.1%	53.8%	58.4%	57.8%	50.8%	55.9%	68.0%
Tourism negatively impacts the county's natural areas	38.8%	40.4%	41.0%	34.2%	38.3%	32.7%	36.6%	38.6%	36.2%	42.6%	41.8%	49.5%
There are too many tourists in my local community.	33.0%	39.6%	40.0%	26.7%	34.9%	32.3%	34.9%	34.8%	34.1%	40.5%	45.5%	52.2%
I am worried about the impact tourism has on our community culture.	31.9%	36.1%	36.1%	23.1%	30.8%	32.8%	34.2%	32.5%	24.5%	39.0%	41.9%	37.2%
Tourists make my community less safe.	28.5%	36.0%	35.4%	22.9%	30.2%	29.7%	33.7%	31.7%	25.8%	36.6%	43.4%	46.0%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

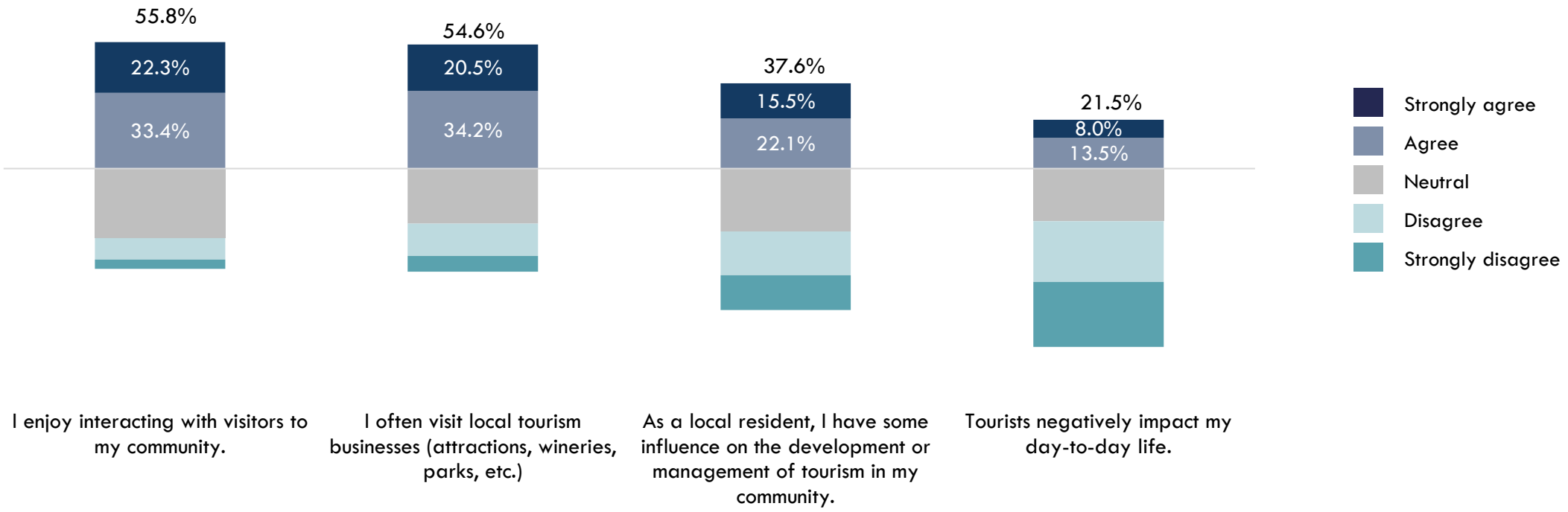
TOURISM INDUSTRY IMPACT ON COMMUNITY

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
Top 2 Box	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Tourism helps to support local wineries and helps the region's wine country continue to thrive.	75.8%	80.2%	84.3%	82.2%	82.0%
Tourism supports events in my local area that I enjoy as a resident.	75.9%	74.0%	70.3%	77.0%	67.7%
Visitor spending generates funding for community services.	72.1%	73.0%	67.4%	72.4%	70.3%
Tourism helps to maintain the flight routes available for San Luis Obispo County Regional Airport	69.9%	68.1%	67.0%	73.0%	63.6%
San Luis Obispo County has a generally healthy balance of tourism and resident activity	69.9%	66.9%	59.2%	67.4%	61.9%
Tourists are respectful of my local community.	67.0%	55.8%	50.9%	63.4%	53.2%
Tourists bring crowds, congestion, and traffic to my community.	53.9%	63.5%	57.9%	58.9%	58.8%
Tourism negatively impacts the county's natural areas	38.8%	35.7%	35.9%	41.7%	34.9%
There are too many tourists in my local community.	38.0%	34.5%	29.2%	40.7%	31.1%
I am worried about the impact tourism has on our community culture.	35.4%	25.3%	27.1%	38.4%	24.7%
Tourists make my community less safe.	36.6%	25.9%	25.5%	36.2%	26.0%
Base	**646**	**388**	**1182**	**1246**	**958**

TOURISM INDUSTRY PERSONAL IMPACT

In terms of personal impact, over half of residents agreed that they enjoy interacting with visitors to their community (55.8%) and/or often visit local tourism businesses (54.6%). Only one in five (21.5%) agreed that tourists negatively impact their day-to-day life. At the same time, only just over one-third (37.6%) agreed that they have influence as residents on the development or management of tourism in their community, which was slightly below (-3.2pp) the share of California residents who agreed with this statement (40.8%). Established Families (38.7%), Recent Movers (34.4%), Millennials (31.1%), and San Luis Obispo residents (29.7%) were the segments most likely to agree that tourists negatively impact their day-to-day life. That being said, those same segments, as well as Current Employees, had the highest agreement levels for enjoying interacting with visitors to their communities, and were also the most likely to say that they often visit local tourism businesses. They also had a higher agreement levels with the statement around resident influence on tourism development and management in their communities, whereas non-Cambria/Avila Beach Unincorporated Area (20.2%), Paso Robles (23.1%), and Pismo Beach (25.6%) residents had the lowest agreement levels.



Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements. Base: All respondents. 2,520 completed surveys.

TOURISM INDUSTRY PERSONAL IMPACT

Detail by Resident Community Segment

Top 2 Box	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Tourists negatively impact my day-to-day life.	29.7%	17.3%	8.4%	19.0%	25.7%	24.8%	18.0%	25.3%	14.4%	12.9%
I often visit local tourism businesses (attractions, wineries, parks, etc.)	63.8%	43.9%	53.6%	46.7%	47.8%	43.2%	51.3%	62.0%	65.1%	41.6%
I enjoy interacting with visitors to my community.	69.2%	49.0%	50.6%	42.3%	51.2%	53.0%	51.1%	54.1%	46.9%	45.9%
As a local resident, I have some influence on the development or management of tourism in my community.	53.2%	23.1%	30.1%	29.5%	30.9%	30.8%	25.6%	47.1%	35.6%	20.2%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

TOURISM INDUSTRY PERSONAL IMPACT

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
Top 2 Box	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Tourists negatively impact my day-to-day life.	20.9%	31.1%	25.4%	9.1%	20.9%	20.9%	26.2%	23.1%	12.8%	34.4%	38.7%	36.1%
I often visit local tourism businesses (attractions, wineries, parks, etc.)	46.1%	61.7%	60.6%	45.7%	54.8%	55.8%	56.3%	55.6%	49.8%	70.6%	67.1%	61.1%
I enjoy interacting with visitors to my community.	48.2%	63.7%	61.7%	45.5%	55.6%	59.4%	59.8%	57.7%	45.0%	71.8%	74.1%	58.3%
As a local resident, I have some influence on the development or management of tourism in my community.	37.3%	51.7%	44.3%	18.8%	36.9%	39.1%	42.9%	37.7%	37.2%	60.5%	61.3%	50.1%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**208**

TOURISM INDUSTRY PERSONAL IMPACT

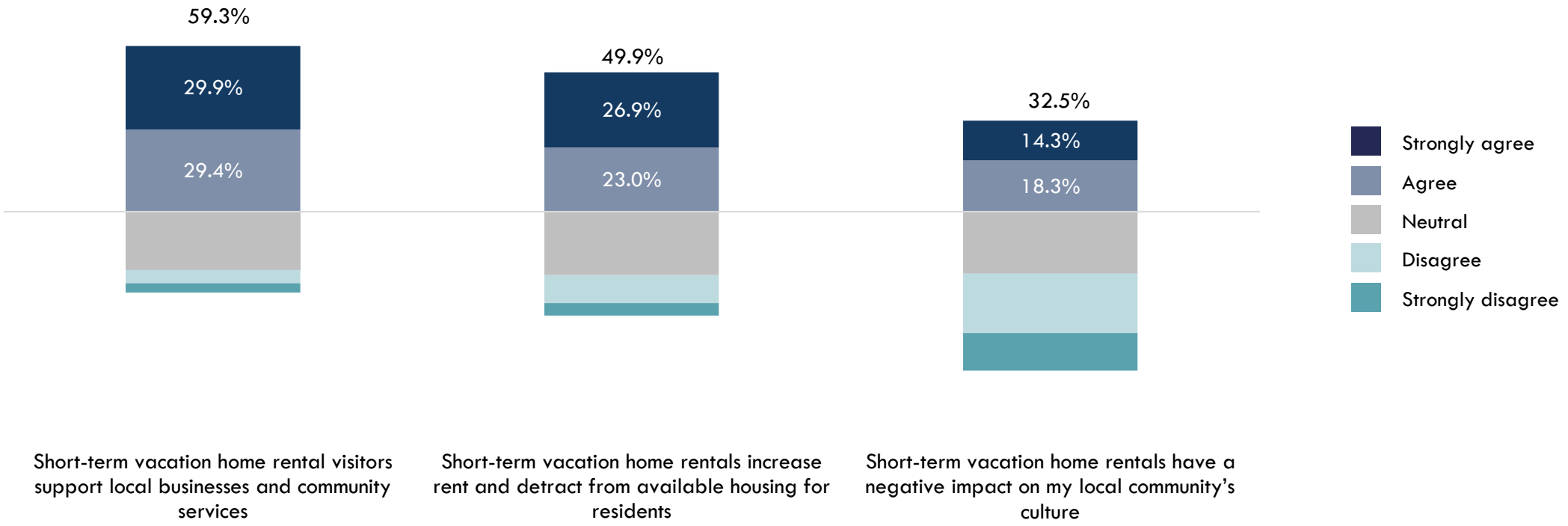
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
Top 2 Box	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Tourists negatively impact my day-to-day life.	30.4%	16.4%	14.0%	29.2%	14.0%
I often visit local tourism businesses (attractions, wineries, parks, etc.)	65.3%	54.2%	47.4%	62.4%	48.4%
I enjoy interacting with visitors to my community.	70.4%	57.7%	45.9%	63.1%	47.6%
As a local resident, I have some influence on the development or management of tourism in my community.	56.6%	34.2%	24.6%	47.9%	27.8%
Base	**646**	**388**	**1182**	**1246**	**958**

SHORT-TERM RENTALS

SHORT-TERM RENTALS IMPACT ON COMMUNITY

Nearly six in ten (59.3%) residents agreed that short-term vacation home rental visitors support local businesses and community services, but at the same time half (49.9%) agreed that these rentals increase rent and detract from available housing for residents. Just under one-third (32.5%) agreed that these rentals negatively impact their local community's culture. Over 70 percent of Recent Movers (77.9%), Established Families (74.9%), San Luis Obispo residents (74.0%), and Current Employees (71.7%) agreed that short-term vacation home rental visitors support local businesses and community services, but at least 40 percent of each of those same segments also agreed that rentals have a negative impact on community culture. 58.9 percent of Established Families also agreed that these rentals increase rent and detract from available housing for residents.



Question: Thinking now about short-term vacation home rentals in your community, please rate how much you agree with the following statements using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree." Base: All respondents. 2,520 completed surveys.

SHORT-TERM RENTALS IMPACT ON COMMUNITY

Detail by Resident Community Segment

Top 2 Box	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Short-term vacation home rental visitors support local businesses and community services	74.0%	45.9%	55.8%	49.2%	52.0%	57.2%	60.7%	58.1%	43.3%	50.5%
Short-term vacation home rentals have a negative impact on my local community's culture	40.6%	30.8%	14.4%	28.9%	34.4%	35.8%	27.3%	31.9%	20.6%	34.7%
Short-term vacation home rentals increase rent and detract from available housing for residents	53.1%	53.7%	37.8%	51.5%	54.9%	61.0%	41.1%	45.2%	37.1%	51.5%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

SHORT-TERM RENTALS IMPACT ON COMMUNITY

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
Top 2 Box	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Short-term vacation home rental visitors support local businesses and community services	55.5%	68.2%	68.8%	45.0%	59.4%	59.7%	61.4%	60.2%	54.3%	77.9%	74.9%	66.8%
Short-term vacation home rentals have a negative impact on my local community's culture	29.6%	40.9%	35.2%	23.0%	32.3%	35.4%	35.7%	34.9%	20.2%	41.1%	45.7%	48.1%
Short-term vacation home rentals increase rent and detract from available housing for residents	38.6%	53.1%	55.3%	45.8%	50.4%	46.2%	47.4%	51.9%	38.8%	49.3%	58.9%	63.8%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

SHORT-TERM RENTALS IMPACT ON COMMUNITY

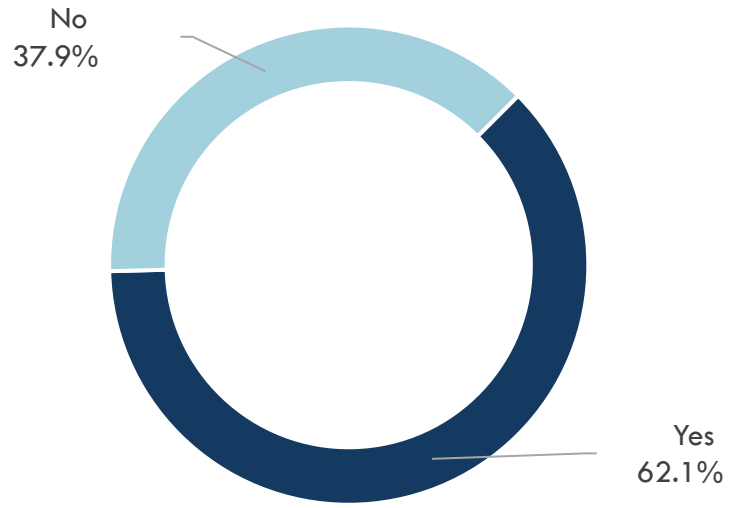
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
Top 2 Box	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Short-term vacation home rental visitors support local businesses and community services	71.7%	61.3%	50.7%	67.9%	52.1%
Short-term vacation home rentals have a negative impact on my local community's culture	38.5%	29.9%	26.2%	40.9%	25.2%
Short-term vacation home rentals increase rent and detract from available housing for residents	51.8%	49.9%	46.9%	58.5%	42.3%
Base	**646**	**388**	**1182**	**1246**	**958**

SHORT-TERM RENTAL USAGE

Nearly two-thirds (62.1%) of residents have stayed in a short-term vacation home rental in the past. Notably, segments who had the highest agreement that vacation home rentals negatively impact their local community culture also had significantly higher rates of personal past usage of short-term rentals. These include Established Families (83.8%), Recent Movers (79.6%), Millennials (70.0%), and San Luis Obispo residents (69.8%). On the other hand, Avila Beach residents (37.1%) and Boomer+ residents (48.7%) were the least likely to have previously stayed in a short-term rental.

Figure: Residents who have Stayed in a Short-Term Vacation Rental Home when Traveling in the Past



Question: Have you stayed in a short-term vacation rental home when traveling in the past? Base: All respondents. 2,520 completed surveys.

PERSONAL SHORT-TERM RENTAL USAGE

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Yes	69.8%	53.3%	60.1%	61.9%	56.7%	64.5%	58.2%	63.8%	37.1%	64.1%
No	30.2%	46.7%	39.9%	38.1%	43.3%	35.5%	41.8%	36.2%	62.9%	35.9%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Yes	64.9%	70.0%	69.1%	48.7%	62.4%	56.7%	62.4%	64.1%	51.1%	79.6%	83.8%	74.0%
No	35.1%	30.0%	30.9%	51.3%	37.6%	43.3%	37.6%	35.9%	48.9%	20.4%	16.2%	26.0%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

Detail by Industry Segment

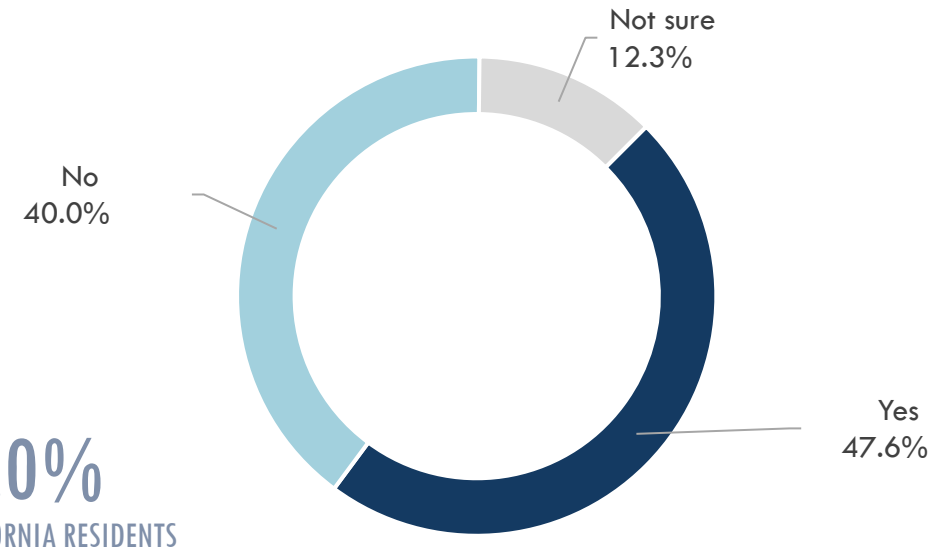
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Yes	75.8%	63.7%	52.1%	72.0%	52.6%
No	24.2%	36.3%	47.9%	28.0%	47.4%
Base	**646**	**388**	**1182**	**1246**	**958**

DMO AWARENESS

DMO AWARENESS

Nearly half of residents (47.6%) had heard of Visit SLO CAL prior to taking the survey, while 40.0 percent had not, and an additional 12.3 percent were not sure. This was over 10 percentage points higher than the share of California residents who had heard of their community's DMO. DMO awareness was highest among Established Families (70.2%), Current Employees (62.5%), Millennials (59.1%), Recent Movers (58.8%), and San Luis Obispo residents (58.2%). Notably, these same segments were also had a higher likelihood to agree that they have some influence on the development and management of tourism in their communities.

Figure: Prior Awareness of Visit SLO CAL



37.0%

OF ALL CALIFORNIA RESIDENTS HAD HEARD OF THEIR COMMUNITY'S DESTINATION MARKETING ORGANIZATION

Question: Prior to this survey, have you heard of Visit SLO CAL, the county-level official destination marketing organization (i.e., the organization that promotes travel to your community)?
Base: All respondents. 2,520 completed surveys.

DMO AWARENESS

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Yes	58.2%	44.7%	33.6%	43.9%	36.7%	55.2%	33.5%	40.5%	25.6%	54.2%
No	30.7%	40.3%	48.9%	40.5%	46.9%	31.4%	48.8%	51.1%	68.3%	36.2%
Not sure	11.1%	15.0%	17.6%	15.6%	16.4%	13.4%	17.7%	8.5%	6.1%	9.6%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

Detail by Demographic Segment

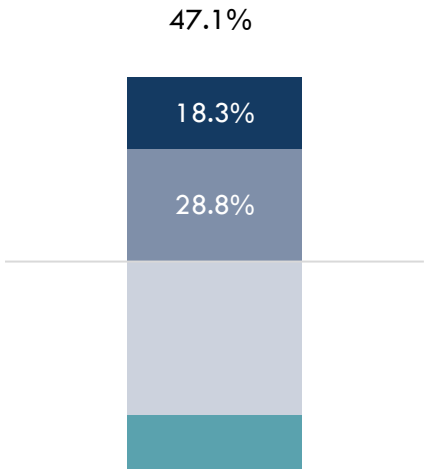
	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Yes	45.2%	59.1%	50.9%	34.1%	48.5%	45.0%	45.6%	50.4%	32.5%	58.8%	70.2%	58.5%
No	36.8%	29.5%	38.2%	53.0%	39.4%	40.3%	41.7%	37.7%	52.8%	27.5%	22.6%	32.0%
Not sure	18.0%	11.4%	10.9%	12.9%	12.1%	14.6%	12.6%	11.9%	14.7%	13.7%	7.2%	9.5%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**208**

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Yes	62.5%	47.3%	36.2%	100.0%	0.0%
No	28.3%	35.9%	49.9%	0.0%	100.0%
Not sure	9.3%	16.8%	14.0%	0.0%	0.0%
Base	**646**	**388**	**1182**	**1246**	**958**

FAMILIARITY WITH DMO WORK

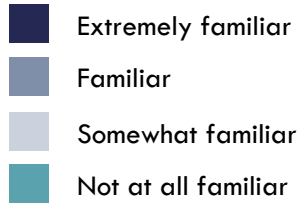
Of respondents who are aware of Visit SLO CAL, 86.3 percent were familiar or extremely familiar with the work being done by the DMO. This was slightly below (-2.0pp) the share of California residents who were familiar with their DMO's work (49.1%). This was highest among Established Families (68.8%), Recent Movers (66.6%), Current Employees (65.6%), and San Luis Obispo residents (65.3%)



Familiarity with Visit SLO CAL's work

49.1%

OF ALL CALIFORNIA RESIDENTS ARE FAMILIAR WITH THE WORK DONE BY THEIR COMMUNITY'S DESTINATION MARKETING ORGANIZATION



Question: How familiar are you with the work done by Visit SLO CAL, the county-level official destination marketing organization?
Base: DMO aware respondents. 1,200 completed surveys.

Destination Analysts

ECONOMIC IMPACT AWARENESS

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Any familiarity	**94.0%**	**75.5%**	**74.6%**	**86.7%**	**71.5%**	**92.6%**	**76.5%**	**87.1%**	**89.8%**	**75.1%**
Extremely familiar	29.5%	4.5%	14.8%	10.9%	5.4%	4.7%	15.0%	21.5%	22.7%	5.6%
Familiar	35.8%	25.0%	18.6%	16.9%	18.1%	25.9%	38.5%	27.3%	40.8%	20.5%
Somewhat familiar	28.6%	45.9%	41.2%	58.9%	48.0%	62.0%	23.1%	38.4%	26.3%	49.0%
Not at all familiar	6.0%	24.5%	25.4%	13.3%	28.5%	7.4%	23.5%	12.9%	10.2%	24.9%
Base	**570**	**102**	**80**	**88**	**36**	**75**	**40**	**79**	**48**	**128**

**Excluding residents of Avila Beach and Cambria*

ECONOMIC IMPACT AWARENESS

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Any familiarity	**87.3%**	**91.8%**	**87.2%**	**75.0%**	**86.4%**	**84.6%**	**88.6%**	**86.7%**	**82.6%**	**97.1%**	**93.7%**	**91.3%**
Extremely familiar	9.9%	27.1%	18.1%	5.1%	18.0%	16.6%	21.1%	18.4%	18.1%	21.3%	31.1%	26.7%
Familiar	31.7%	34.2%	32.2%	14.9%	28.9%	30.8%	30.9%	29.4%	23.8%	45.3%	37.8%	31.6%
Somewhat familiar	45.7%	30.5%	36.9%	55.0%	39.5%	37.2%	36.6%	39.0%	40.8%	30.5%	24.9%	32.9%
Not at all familiar	12.7%	8.2%	12.8%	25.0%	13.6%	15.4%	11.4%	13.3%	17.4%	2.9%	6.3%	8.7%
Base	**137**	**628**	**322**	**159**	**844**	**181**	**371**	**1110**	**136**	**182**	**313**	**125**

ECONOMIC IMPACT AWARENESS

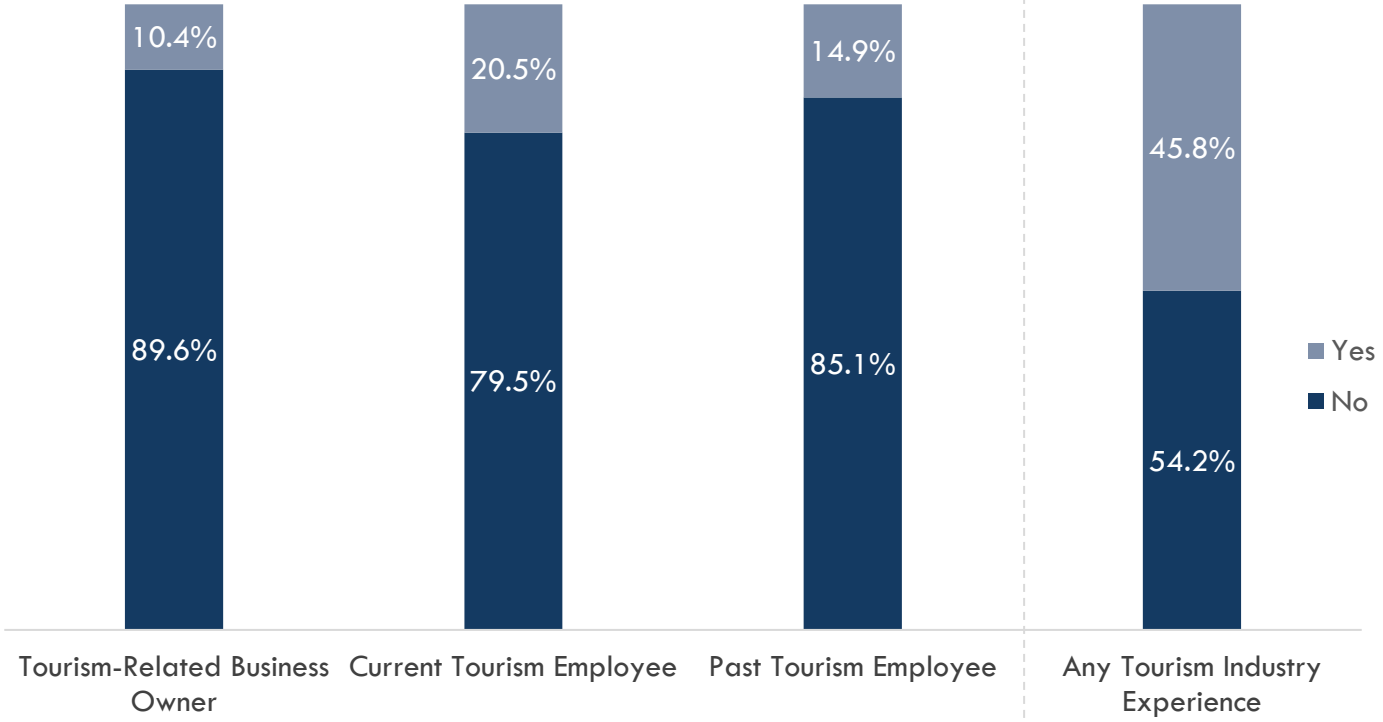
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE
Any familiarity	**96.0%**	**90.1%**	**74.8%**	**86.3%**
Extremely familiar	26.4%	7.9%	7.0%	18.3%
Familiar	39.2%	29.1%	19.5%	28.8%
Somewhat familiar	30.5%	53.0%	48.4%	39.2%
Not at all familiar	4.0%	9.9%	25.2%	13.7%
Base	**400**	**189**	**427**	**1246**

EMPLOYMENT IN SAN LUIS OBISPO COUNTY

EMPLOYMENT IN SLO CAL'S TOURISM INDUSTRY

One in five residents in San Luis Obispo County (20.5%) currently work in the tourism industry. An additional 14.9 percent of residents have previously worked in the tourism industry. When considering San Luis Obispo County's population over the age of 18, nearly 90,000 residents either own a business related to the tourism industry or are currently employed within the tourism industry.



	San Luis Obispo County Population (2022)
Total Residents	282,013*
Residents over age 18	232,661*
Currently Works in Tourism Industry	57,813**
Owns a Tourism-Related Business	29,611**

**Source: U.S. Census Bureau, July 1, 2022.*

***Calculated from U.S. census data against % of survey respondents who fall into each category*

Question: Which of the following best describes you? Base: All respondents. 2,520 completed surveys.

EMPLOYMENT IN SLO CAL'S TOURISM INDUSTRY

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Tourism-related business owner	29.2%	16.8%	14.7%	14.5%	15.9%	21.0%	27.1%	23.6%	7.5%	12.1%
Current tourism employee	14.8%	14.8%	15.6%	14.6%	19.2%	20.3%	12.0%	18.8%	12.5%	10.9%
Past tourism employee	18.1%	4.7%	6.5%	9.8%	6.1%	9.4%	5.4%	4.8%	6.4%	5.5%
Any tourism industry experience	62.1%	36.2%	36.8%	38.8%	41.2%	50.7%	44.5%	47.2%	26.4%	28.6%
Base	**634**	**99**	**87**	**93**	**48**	**78**	**52**	**92**	**59**	**97**

**Excluding residents of Avila Beach and Cambria*

EMPLOYMENT IN SLO CAL'S TOURISM INDUSTRY

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Tourism-related business owner	36.3%	31.7%	23.7%	3.1%	18.5%	30.0%	33.2%	21.2%	16.5%	42.0%	31.1%	27.2%
Current tourism employee	23.4%	17.5%	10.6%	12.9%	15.0%	17.5%	15.1%	14.4%	17.7%	12.0%	14.6%	13.3%
Past tourism employee	9.2%	17.8%	12.1%	2.2%	10.6%	8.9%	10.3%	11.5%	4.8%	17.7%	25.1%	19.4%
Any tourism industry experience	68.8%	66.9%	46.4%	18.2%	44.0%	56.5%	58.7%	47.2%	39.1%	71.7%	70.7%	59.9%
Base	**210**	**732**	**304**	**93**	**825**	**230**	**483**	**1163**	**176**	**318**	**453**	**209**

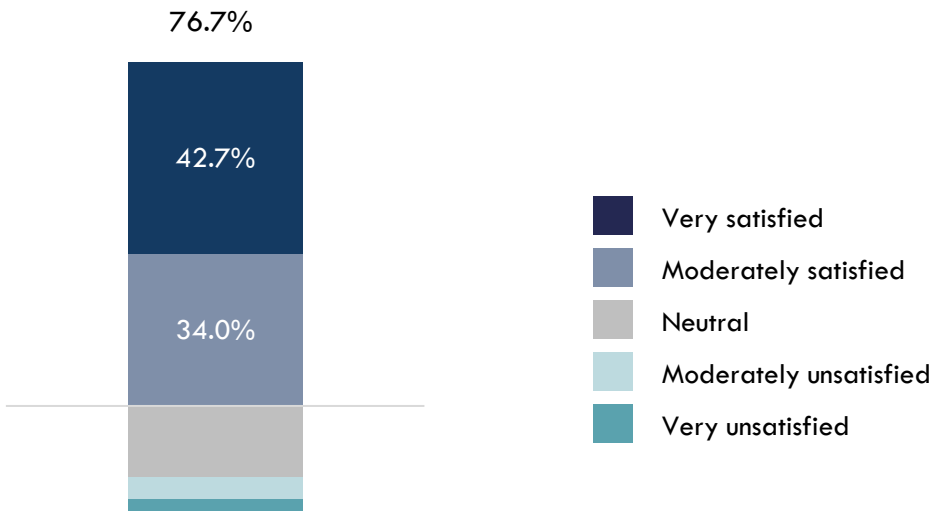
EMPLOYMENT IN SLO CAL'S TOURISM INDUSTRY

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT		DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	DMO AWARE	DMO UNAWARE
Tourism-related business owner	100.0%	0.0%	26.9%	14.5%
Current tourism employee	0.0%	100.0%	14.8%	13.4%
Past tourism employee	0.0%	0.0%	17.2%	4.8%
Any tourism industry experience	100.0%	100.0%	59.0%	32.6%
Base	**646**	**388**	**821**	**377**

SATISFACTION WITH TOURISM INDUSTRY EMPLOYMENT

Among residents who either own a tourism-related business or have had experience working in San Luis Obispo County's tourism industry, three-fourths were moderately or very satisfied with their employment experience (76.7%).



Satisfacion with Employment in SLO CAL Tourism Industry

Question: How would you rate your overall satisfaction with working in San Luis Obispo County's tourism industry? Base: Respondents who either own a tourism-related business or have had any experience working in the county tourism industry. 1,339 completed surveys.

SATISFACTION WITH TOURISM INDUSTRY EMPLOYMENT

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Top 2 Box	**86.2%**	**64.5%**	**74.7%**	**64.3%**	**71.7%**	**64.6%**	**58.1%**	**73.7%**	**71.3%**	**66.4%**
Very satisfied	53.0%	35.4%	27.0%	35.1%	31.3%	29.1%	31.2%	40.3%	37.4%	33.6%
Moderately satisfied	33.2%	29.1%	47.7%	29.2%	40.4%	35.5%	26.9%	33.4%	33.9%	32.8%
Neutral	9.7%	28.2%	15.1%	22.3%	17.0%	28.2%	33.2%	18.0%	21.3%	14.8%
Moderately unsatisfied	3.2%	6.7%	4.8%	8.1%	11.3%	2.8%	6.1%	5.0%	4.2%	9.6%
Very unsatisfied	0.9%	0.5%	5.4%	5.2%	0.0%	4.4%	2.6%	3.2%	3.2%	9.2%
Base	**634**	**99**	**87**	**93**	**48**	**78**	**52**	**92**	**59**	**97**

**Excluding residents of Avila Beach and Cambria*

SATISFACTION WITH TOURISM INDUSTRY EMPLOYMENT

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Top 2 Box	**67.5%**	**78.5%**	**79.5%**	**71.4%**	**78.5%**	**71.6%**	**70.2%**	**78.4%**	**63.3%**	**84.1%**	**82.9%**	**82.6%**
Much better	23.7%	45.1%	47.9%	41.5%	44.2%	36.4%	37.8%	44.9%	27.7%	52.6%	52.5%	50.6%
Somewhat better	43.8%	33.4%	31.6%	29.8%	34.3%	35.2%	32.5%	33.5%	35.6%	31.5%	30.4%	32.0%
Unchanged/same	21.8%	13.9%	13.9%	22.5%	14.3%	19.9%	21.1%	14.5%	26.3%	10.3%	9.7%	13.0%
Somewhat worse	10.7%	4.7%	4.1%	2.2%	4.6%	6.8%	6.3%	4.5%	8.1%	2.8%	4.8%	2.9%
Much worse	0.0%	2.9%	2.6%	3.9%	2.6%	1.7%	2.4%	2.6%	2.3%	2.8%	2.6%	1.4%
Base	**210**	**732**	**304**	**93**	**825**	**230**	**483**	**1163**	**176**	**233**	**318**	**128**

SATISFACTION WITH TOURISM INDUSTRY EMPLOYMENT

Detail by Industry Segment

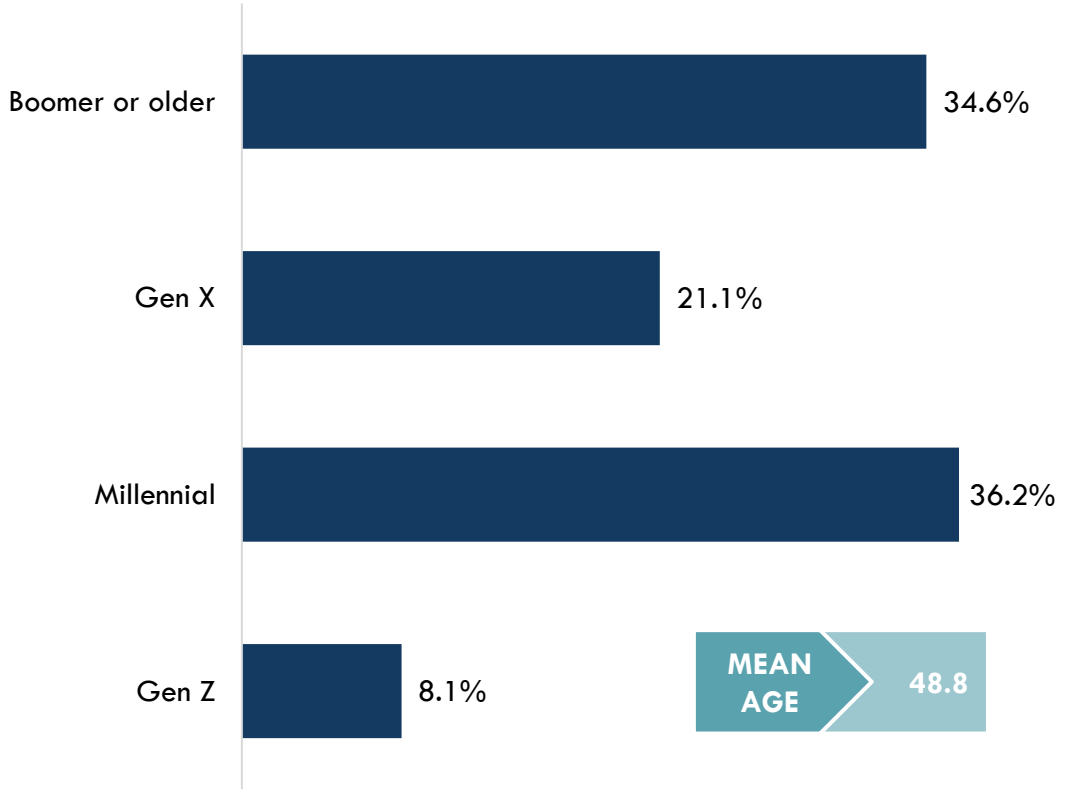
	TOURISM INDUSTRY EMPLOYMENT		DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	DMO AWARE	DMO UNAWARE
Top 2 Box	**77.3%**	**70.2%**	**81.3%**	**69.5%**
Much better	43.4%	30.3%	51.1%	29.5%
Somewhat better	33.9%	39.9%	30.2%	40.1%
Unchanged/same	15.7%	21.0%	11.3%	21.3%
Somewhat worse	5.0%	5.8%	4.9%	5.9%
Much worse	1.9%	3.1%	2.5%	3.3%
Base	**646**	**388**	**821**	**377**

DEMOGRAPHICS

AGE/GENERATION

The average age of respondents was 48.8 years. Millennials comprised 36.2 percent and Baby boomers or older comprised 34.6 percent of the sample. One in five (21.1%) were Gen X, and 8.1 percent were Gen Z.

Figure: Generation



Question: What year were you born? Base: All respondents. 2,520 completed surveys.

AGE/GENERATION

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Boomer or older	13.7%	45.9%	44.3%	53.0%	39.2%	36.1%	20.9%	47.3%	54.3%	47.9%
Gen X	20.0%	14.5%	25.2%	16.7%	27.1%	27.3%	24.2%	22.6%	22.8%	22.4%
Millennial	56.5%	28.5%	25.5%	23.0%	24.9%	25.1%	43.8%	22.9%	19.2%	25.6%
Gen Z	9.7%	11.0%	5.0%	7.2%	8.7%	11.5%	11.1%	7.2%	3.8%	4.1%
Mean	**40.7**	**50.7**	**53.8**	**54.9**	**51.1**	**49.8**	**43.3**	**55.2**	**57.6**	**54.4**
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

AGE/GENERATION

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Boomer or older	0.0%	0.0%	0.0%	100.0%	38.0%	11.7%	13.2%	36.3%	24.8%	2.2%	2.0%	11.1%
Gen X	0.0%	0.0%	100.0%	0.0%	20.7%	17.4%	22.7%	20.3%	25.8%	27.6%	22.9%	40.4%
Millennial	0.0%	100.0%	0.0%	0.0%	35.4%	49.9%	44.2%	35.8%	39.2%	62.3%	72.3%	44.8%
Gen Z	100.0%	0.0%	0.0%	0.0%	5.9%	21.0%	19.9%	7.7%	10.3%	7.9%	2.8%	3.7%
Mean	**22.4**	**34.5**	**48.1**	**70.5**	**50.4**	**37.6**	**39.2**	**49.4**	**45.7**	**37.8**	**38.2**	**43.8**
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

AGE/GENERATION

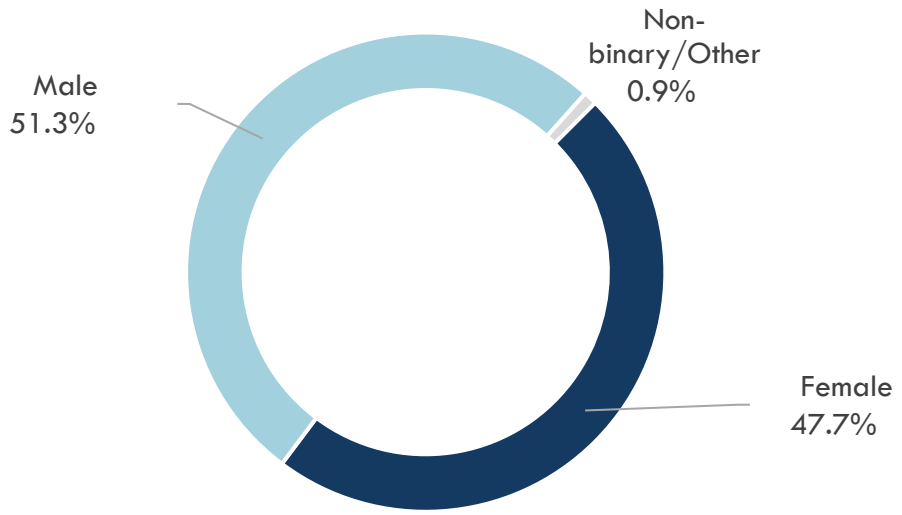
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Boomer or older	5.3%	29.8%	52.2%	24.7%	45.7%
Gen X	24.4%	15.0%	20.9%	22.5%	20.1%
Millennial	56.0%	42.5%	22.2%	45.1%	26.7%
Gen Z	14.3%	12.7%	4.7%	7.7%	7.5%
Mean	**37.8**	**45.2**	**55.8**	**45.4**	**52.8**
Base	**646**	**388**	**1182**	**1246**	**958**

GENDER

Respondents were fairly evenly split between genders, skewing slightly more male (51.3%). 47.7 percent identified as female, and 0.9 percent identified as non-binary/other.

Figure: Gender



Question: What is your gender? Base: All respondents. 2,520 completed surveys.

PERSONAL SHORT-TERM RENTAL USAGE

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Female	40.7%	52.8%	48.9%	59.7%	61.3%	47.3%	57.6%	41.5%	36.8%	57.1%
Male	58.5%	44.7%	50.9%	40.1%	37.8%	50.9%	41.3%	57.9%	63.2%	41.3%
Non-binary/Other	0.8%	2.5%	0.2%	0.2%	0.9%	1.7%	1.0%	0.6%	0.0%	1.6%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Female	47.2%	41.8%	46.6%	54.8%	47.5%	49.5%	47.5%	47.6%	48.2%	43.4%	36.3%	54.3%
Male	48.7%	57.2%	52.8%	44.9%	51.7%	49.5%	51.1%	51.5%	50.3%	56.2%	63.5%	45.1%
Non-binary/Other	4.1%	1.0%	0.6%	0.4%	0.8%	1.0%	1.4%	0.8%	1.6%	0.4%	0.2%	0.5%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

Detail by Industry Segment

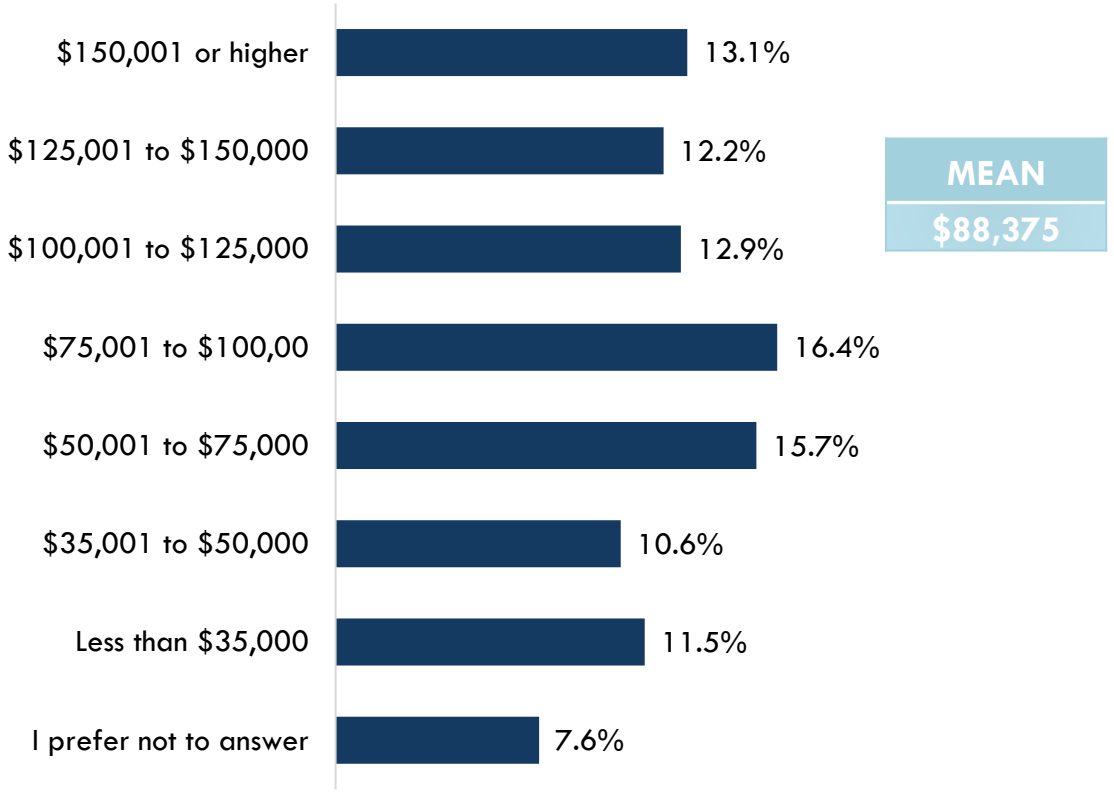
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Female	43.9%	46.5%	52.7%	48.8%	44.4%
Male	55.1%	51.5%	46.5%	50.2%	55.0%
Non-binary/Other	0.9%	2.0%	0.8%	1.0%	0.5%
Base	**646**	**388**	**1182**	**1246**	**958**

ANNUAL HOUSEHOLD INCOME

The average household income among residents was $88,375. 38.2 percent earned over $100,000 in annual household income. Cambria ($98,762) and San Luis Obispo ($94,621) had the highest income among the community segments, while Paso Robles residents had the lowest average income ($73,700).

Among the other segments, Recent Movers ($101,563), Established Families ($109,827), DMO Aware ($95,999), Millennials ($95,226), and Gen X ($94,830) had the highest average annual household income.

Figure: Annual Household Income



Question: What is your annual household income?
Base: All respondents. 2,520 completed surveys.

ANNUAL HOUSEHOLD INCOME

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
$150,001 or higher	14.6%	10.5%	12.3%	13.3%	11.4%	15.8%	9.0%	11.4%	12.0%	13.6%
$125,001 to $150,000	16.3%	5.2%	10.2%	10.1%	14.0%	9.7%	13.2%	17.8%	3.1%	11.8%
$100,001 to $125,000	15.3%	11.1%	7.0%	11.6%	10.1%	11.9%	13.4%	16.5%	11.9%	12.5%
$75,001 to $100,00	19.6%	16.5%	13.2%	13.6%	15.9%	16.7%	16.9%	14.5%	12.5%	15.0%
$50,001 to $75,000	12.9%	19.3%	14.7%	18.4%	18.2%	14.0%	15.7%	17.0%	22.6%	14.7%
$35,001 to $50,000	8.4%	15.6%	13.9%	12.0%	14.5%	11.0%	19.0%	2.8%	7.0%	11.8%
Less than $35,000	10.2%	19.4%	13.6%	12.7%	10.9%	12.2%	8.6%	6.9%	1.8%	15.4%
I prefer not to answer	2.7%	2.5%	15.1%	8.3%	5.1%	8.7%	4.1%	13.2%	29.1%	5.3%
Mean	**$94,621**	**$73,700**	**$81,776**	**$84,594**	**$85,312**	**$88,300**	**$84,456**	**$98,761**	**$90,300**	**$85,112**
Base	**957**	**229**	**176**	**173**	**97**	**126**	**97**	**138**	**114**	**237**

**Excluding residents of Avila Beach and Cambria*

ANNUAL HOUSEHOLD INCOME

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
$150,001 or higher	5.3%	15.4%	17.4%	9.8%	13.8%	8.2%	9.9%	13.6%	10.3%	15.3%	21.2%	21.5%
$125,001 to $150,000	3.6%	16.0%	14.9%	8.6%	13.3%	3.9%	8.0%	12.9%	8.6%	19.3%	19.9%	23.9%
$100,001 to $125,000	10.7%	15.9%	12.5%	10.4%	13.3%	13.0%	12.2%	13.8%	7.6%	19.7%	21.6%	14.1%
$75,001 to $100,00	17.7%	17.4%	16.7%	15.0%	16.3%	20.6%	18.1%	16.6%	15.4%	16.2%	18.8%	14.7%
$50,001 to $75,000	17.8%	14.5%	12.2%	18.5%	15.2%	18.5%	18.9%	15.1%	18.6%	16.3%	8.5%	12.8%
$35,001 to $50,000	17.1%	8.3%	8.4%	12.9%	9.8%	16.3%	14.7%	11.0%	8.7%	8.4%	5.0%	3.6%
Less than $35,000	22.9%	9.6%	11.2%	11.0%	11.3%	15.2%	12.8%	10.8%	15.5%	3.4%	3.2%	5.8%
I prefer not to answer	5.0%	2.9%	6.8%	13.7%	7.1%	4.4%	5.4%	6.2%	15.3%	1.3%	1.8%	3.5%
Mean	**$66,055**	**$95,226**	**$94,830**	**$81,545**	**$90,216**	**$74,651**	**$80,016**	**$89,782**	**$79,445**	**$101,562**	**$109,826**	**$108,233**
Base	**281**	**1075**	**591**	**397**	**1540**	**374**	**752**	**2004**	**340**	**313**	**445**	**201**

ANNUAL HOUSEHOLD INCOME

Detail by Industry Segment

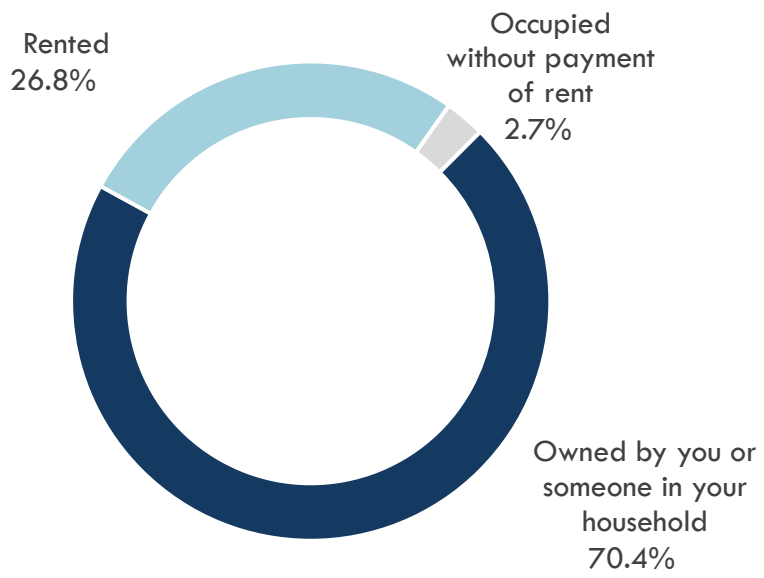
	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
$150,001 or higher	12.8%	9.2%	12.2%	15.0%	11.6%
$125,001 to $150,000	18.2%	8.6%	9.1%	17.2%	8.5%
$100,001 to $125,000	15.8%	11.1%	11.6%	15.8%	10.9%
$75,001 to $100,00	17.2%	14.9%	16.2%	15.2%	16.2%
$50,001 to $75,000	16.0%	19.3%	15.6%	13.1%	18.8%
$35,001 to $50,000	8.8%	14.8%	11.1%	10.7%	11.2%
Less than $35,000	8.8%	18.6%	12.2%	8.3%	12.7%
I prefer not to answer	2.3%	3.5%	12.0%	4.8%	9.9%
Mean	**$94,577**	**$75,410**	**$84,781**	**$95,998**	**$82,592**
Base	**634**	**371**	**1041**	**1192**	**868**

HOUSING STATUS

The majority of residents said they live in a property that is owned by them or someone in their household (70.4%). One-fourth (26.8%) live in a rented property.

Among the segments, Gen Z (54.9%), Past Employees (43.5%), Pismo Beach residents (43.4%), and Hispanic/Latino (41.3%) were significantly more likely to live in rented properties.

Figure: Housing Status



Question: Which best describes the property you live in? Base: All respondents. 2,520 completed surveys.

PERSONAL SHORT-TERM RENTAL USAGE

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Owned by you or someone in your household	72.3%	62.0%	78.2%	66.9%	66.4%	66.4%	51.1%	83.1%	76.3%	67.3%
Rented	26.6%	31.7%	20.0%	29.3%	31.8%	29.5%	43.4%	13.8%	22.2%	29.0%
Occupied without payment of rent	1.1%	6.3%	1.8%	3.9%	1.9%	4.1%	5.5%	3.1%	1.5%	3.7%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Owned by you or someone in your household	40.9%	67.5%	71.5%	79.8%	73.0%	55.3%	58.8%	71.4%	65.4%	73.5%	79.8%	72.6%
Rented	54.9%	29.5%	25.6%	18.1%	24.4%	41.3%	37.8%	26.1%	31.1%	25.8%	18.7%	25.1%
Occupied without payment of rent	4.2%	2.9%	2.9%	2.0%	2.6%	3.4%	3.4%	2.6%	3.5%	0.7%	1.5%	2.3%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

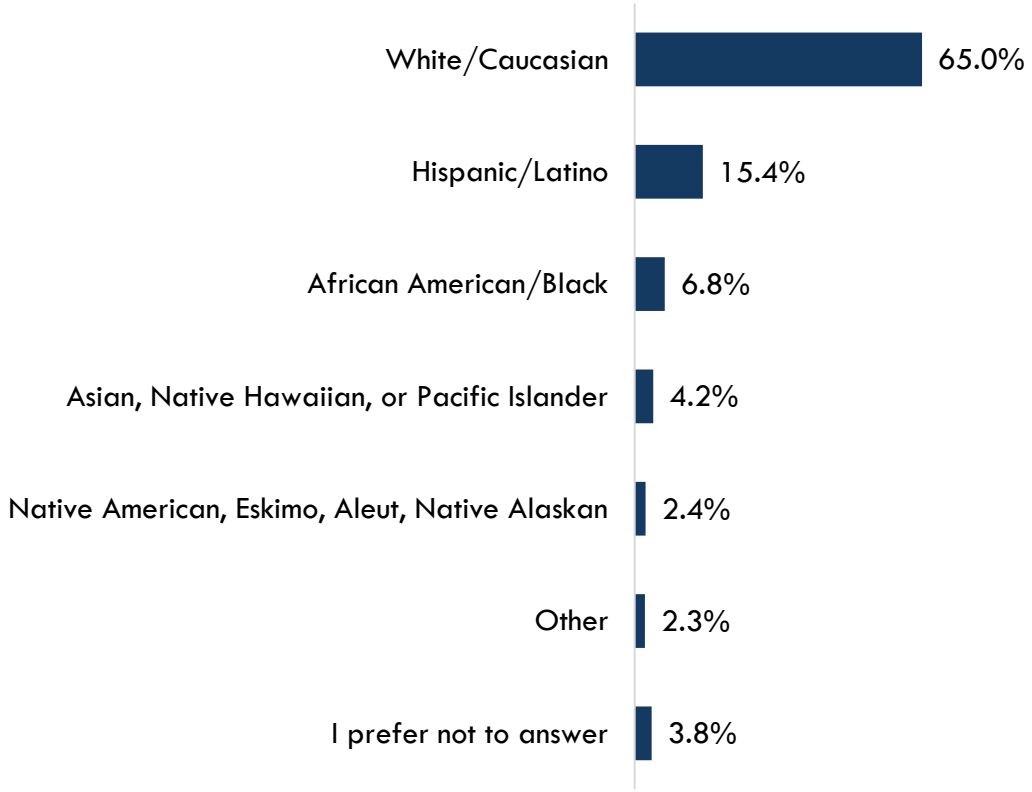
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Owned by you or someone in your household	70.5%	54.4%	72.0%	74.0%	68.1%
Rented	27.7%	43.5%	24.5%	24.3%	28.7%
Occupied without payment of rent	1.9%	2.2%	3.5%	1.7%	3.2%
Base	**646**	**388**	**1182**	**1246**	**958**

ETHNICITY

The majority of residents identified as White/Caucasian (82.4%), followed by 15.4 percent who identify as Hispanic/Latino.

Figure: Ethnicity



Question: Which of the following describes your race/ethnicity? Base: All respondents. 2,520 completed surveys.

ETHNICITY

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
White/Caucasian	64.7%	63.8%	71.1%	72.7%	62.7%	69.4%	53.5%	58.6%	60.9%	66.3%
Hispanic/Latino	18.7%	17.5%	9.3%	12.3%	15.7%	14.9%	18.8%	8.6%	13.5%	12.5%
African American/Black	7.6%	4.2%	4.9%	4.3%	10.8%	5.2%	7.9%	7.4%	14.1%	3.9%
Asian, Native Hawaiian, or Pacific Islander	4.5%	5.0%	6.9%	2.7%	1.0%	3.0%	5.0%	2.5%	5.1%	3.5%
Native American, Eskimo, Aleut, Native Alaskan	1.1%	2.9%	1.0%	0.5%	1.0%	2.2%	7.9%	12.3%	1.3%	2.4%
Other	1.8%	2.9%	2.5%	2.7%	1.0%	1.5%	3.0%	1.9%	3.2%	3.9%
I prefer not to answer	1.6%	3.8%	4.4%	4.8%	7.8%	3.7%	4.0%	8.6%	1.9%	7.5%
Base	**979**	**240**	**204**	**187**	**102**	**134**	**101**	**162**	**156**	**255**

**Excluding residents of Avila Beach and Cambria*

ETHNICITY

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
White/Caucasian	40.1%	64.6%	65.2%	81.1%	100.0%	0.0%	0.0%	64.3%	68.6%	59.7%	69.3%	58.4%
Hispanic/Latino	29.0%	18.7%	11.2%	5.1%	0.0%	100.0%	49.4%	15.9%	12.8%	18.2%	17.0%	14.4%
African American/Black	11.8%	6.9%	8.3%	1.7%	0.0%	0.0%	21.9%	7.1%	5.5%	10.1%	6.0%	7.2%
Asian, Native Hawaiian, or Pacific Islander	7.7%	4.3%	3.7%	2.3%	0.0%	0.0%	13.5%	4.6%	2.3%	6.0%	4.0%	2.9%
Native American, Eskimo, Aleut, Native Alaskan	3.0%	1.7%	4.2%	1.3%	0.0%	0.0%	7.8%	2.5%	1.8%	3.5%	1.8%	10.5%
Other	4.4%	2.0%	2.2%	2.1%	0.0%	0.0%	7.5%	2.2%	3.3%	1.6%	0.9%	3.3%
I prefer not to answer	4.0%	1.8%	5.1%	6.5%	0.0%	0.0%	0.0%	3.4%	5.8%	0.9%	1.1%	3.3%
Base	**297**	**1107**	**641**	**475**	**1637**	**389**	**787**	**2122**	**398**	**318**	**453**	**209**

ETHNICITY

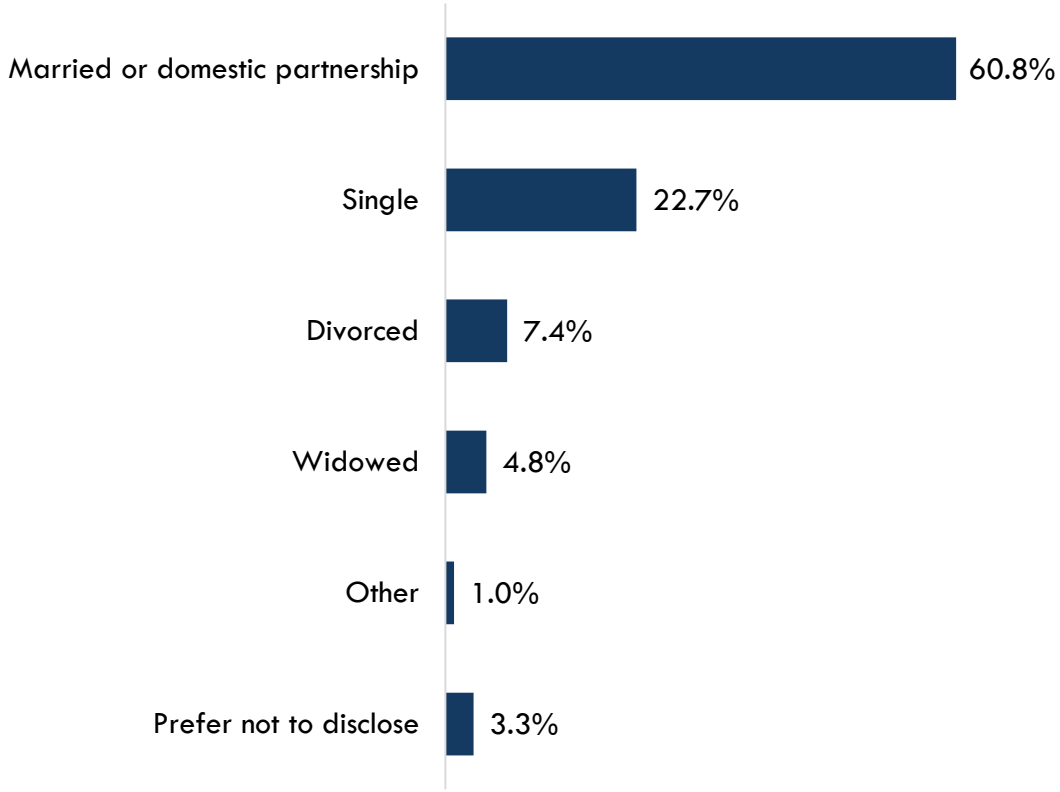
Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
White/Caucasian	56.0%	65.2%	68.8%	67.7%	62.2%
Hispanic/Latino	19.0%	18.0%	13.5%	14.5%	15.9%
African American/Black	10.1%	5.2%	4.7%	6.6%	7.5%
Asian, Native Hawaiian, or Pacific Islander	5.7%	4.9%	4.0%	3.7%	5.2%
Native American, Eskimo, Aleut, Native Alaskan	4.5%	1.3%	1.3%	3.6%	1.4%
Other	2.8%	2.3%	2.5%	1.4%	3.0%
I prefer not to answer	1.9%	3.1%	5.4%	2.5%	4.8%
Base	**646**	**388**	**1182**	**1246**	**958**

MARITAL STATUS

The majority of residents (60.8%) were married or in a domestic partnership, while just under one-fourth (22.7%) were single.

Figure: Marital Status



Question: What is your marital status? Base: All respondents. 2,520 completed surveys.

MARITAL STATUS

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Married or domestic partnership	62.0%	51.1%	55.6%	71.3%	63.2%	56.7%	42.5%	72.8%	62.7%	60.1%
Single	26.4%	28.3%	22.5%	15.8%	13.6%	26.8%	41.8%	9.8%	9.6%	22.7%
Divorced	6.6%	11.0%	8.8%	9.5%	14.5%	6.8%	7.6%	3.1%	2.0%	7.1%
Widowed	3.7%	5.1%	9.0%	2.0%	5.2%	7.9%	2.9%	5.8%	3.3%	6.3%
Other	0.4%	0.8%	2.2%	0.5%	1.0%	0.7%	2.2%	1.8%	2.1%	1.0%
Prefer not to disclose	0.9%	3.6%	1.8%	0.9%	2.4%	1.0%	3.0%	6.7%	20.3%	2.7%
Base	**978**	**239**	**201**	**187**	**102**	**134**	**101**	**158**	**156**	**254**

**Excluding residents of Avila Beach and Cambria*

MARITAL STATUS

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLEN-NIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANS-PLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Married or domestic partnership	23.7%	65.8%	68.1%	59.8%	63.7%	46.2%	49.5%	61.5%	56.7%	80.7%	83.9%	74.8%
Single	68.0%	27.2%	15.4%	11.7%	20.1%	40.1%	37.3%	22.0%	26.5%	12.3%	8.6%	8.4%
Divorced	1.5%	3.5%	9.6%	11.4%	7.8%	5.5%	5.0%	7.7%	5.3%	3.1%	5.3%	7.9%
Widowed	0.7%	0.9%	2.5%	11.4%	5.0%	3.2%	3.6%	4.8%	4.9%	2.7%	0.8%	5.1%
Other	4.1%	1.0%	1.0%	0.3%	0.8%	0.5%	1.6%	0.8%	2.2%	1.0%	0.0%	0.8%
Prefer not to disclose	2.1%	1.6%	3.4%	5.4%	2.5%	4.5%	3.0%	3.1%	4.6%	0.2%	1.5%	2.9%
Base	**297**	**1105**	**639**	**469**	**1637**	**389**	**787**	**2116**	**394**	**318**	**453**	**209**

MARITAL STATUS

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Married or domestic partnership	64.3%	50.9%	58.9%	68.7%	55.7%
Single	26.4%	31.7%	20.1%	19.5%	23.5%
Divorced	4.7%	10.6%	8.2%	5.9%	8.6%
Widowed	2.0%	2.8%	7.3%	3.5%	6.0%
Other	0.9%	2.2%	0.7%	0.6%	1.1%
Prefer not to disclose	1.7%	1.8%	4.8%	1.7%	5.1%
Base	**644**	**387**	**1179**	**1243**	**951**

CHILDREN IN THE HOUSEHOLD

Four in ten residents (41.1%) said they have children under 18 living in their household. San Luis Obispo residents (61.0%) had the highest share of residents with children in the household among the community segments.

Figure: Children Under 18 in the Household

Question: Do you have children under 18 living in your household? Base: All respondents. 2,520 completed surveys.

CHILDREN IN THE HOUSEHOLD

Detail by Resident Community Segment

	SAN LUIS OBISPO	PASO ROBLES	ATASCADERO	ARROYO GRANDE	GROVER BEACH	MORRO BAY	PISMO BEACH	CAMBRIA	AVILA BEACH	UNINCORPO-RATED AREA*
Yes	61.0%	28.0%	30.1%	27.8%	37.6%	35.5%	29.5%	42.0%	24.3%	28.3%
No	39.0%	72.0%	69.9%	72.2%	62.4%	64.5%	70.5%	58.0%	75.7%	71.7%
Base	**978**	**239**	**201**	**187**	**102**	**134**	**101**	**158**	**156**	**254**

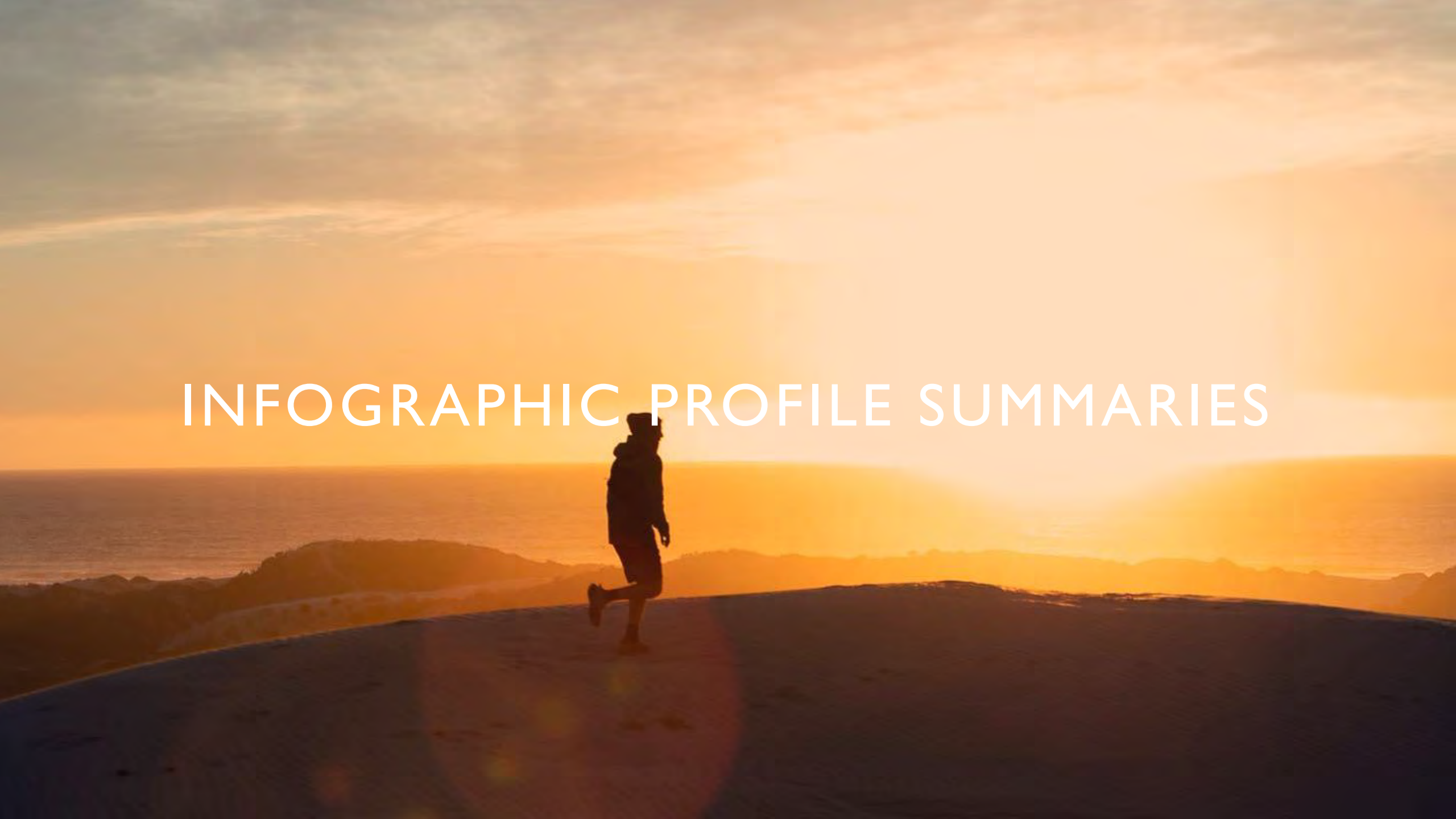
**Excluding residents of Avila Beach and Cambria*

Detail by Demographic Segment

	GENERATION				ETHNICITY			RESIDENCY		FAMILIES		
	GEN Z	MILLENNIAL	GEN X	BOOMER+	WHITE	HISPANIC	ANY POC	TRANSPLANTS	SLO CAL NATIVES	RECENT MOVERS	ESTABLISH-ED	DEEP-ROOTED
Yes	23.0%	71.1%	56.1%	4.4%	40.0%	50.4%	49.7%	41.3%	39.9%	100.0%	100.0%	100.0%
No	77.0%	28.9%	43.9%	95.6%	60.0%	49.6%	50.3%	58.7%	60.1%	0.0%	0.0%	0.0%
Base	**297**	**1105**	**639**	**469**	**1637**	**389**	**787**	**2116**	**394**	**318**	**453**	**209**

Detail by Industry Segment

	TOURISM INDUSTRY EMPLOYMENT			DMO AWARENESS	
	CURRENT EMPLOYEES	PAST EMPLOYEES	NON-EMPLOYEES	DMO AWARE	DMO UNAWARE
Yes	64.5%	38.8%	25.7%	52.6%	29.0%
No	35.5%	61.2%	74.3%	47.4%	71.0%
Base	**644**	**387**	**1179**	**1243**	**951**


INFOGRAPHIC PROFILE SUMMARIES

TOTAL RESIDENTS

2,520 COMPLETED SURVEYS

TOTAL RESIDENTS *Who They Are*

Destination Analysts

GENDER

Female	47.7%
Male	51.3%
Other	0.9%

MARITAL STATUS

Married/Partnered	60.8%
Single	22.8%
Widowed/Divorced	12.2%
CHILDREN IN HOUSEHOLD	*41.1%*

AGE

Gen Z	8.1%
Millennial	36.3%
Gen X	21.1%
Boomer or older	34.5%
MEAN	*48.8*

ETHNICITY

White/Caucasian	65.0%
Hispanic/Latino	15.4%
African American/Black	4.2%
Asian/Pacific Islander	6.8%
Native American	2.4%

HOUSEHOLD INCOME

$88,375

AVERAGE ANNUAL INCOME

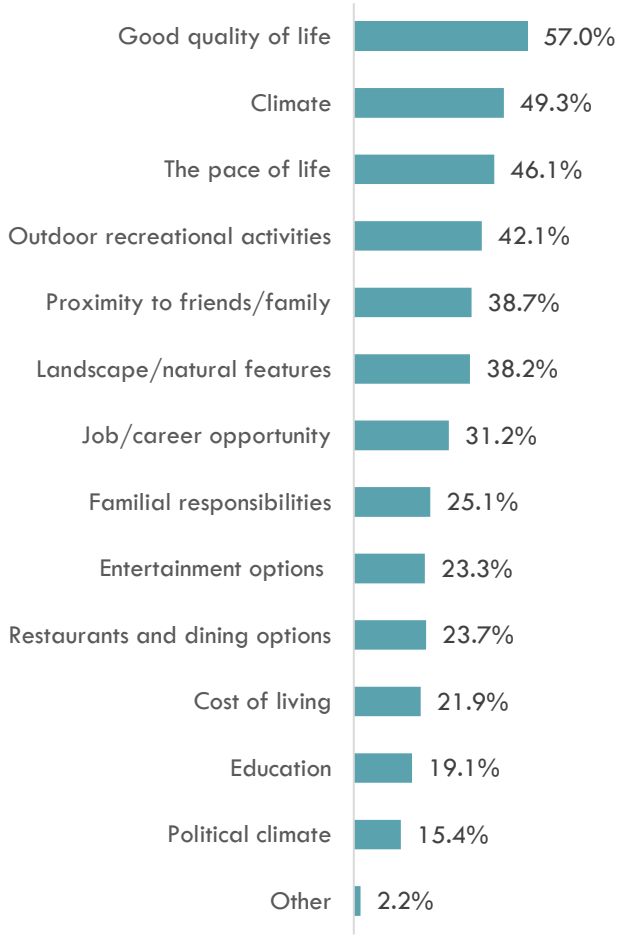
EMPLOYMENT

Employed Full-Time	54.2%
Employed Part-Time	14.0%
Retired	23.5%
Unemployed	8.3%

TOTAL RESIDENTS *Profile*

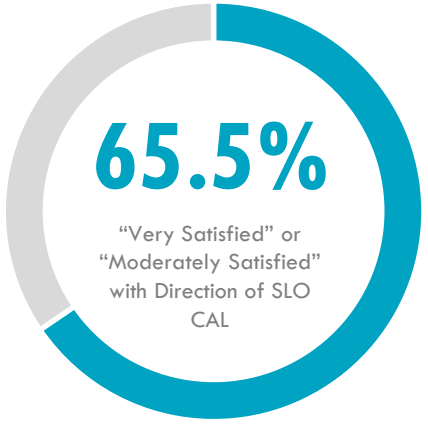
Destination Analysts

REASONS FOR STAYING IN SLO CAL



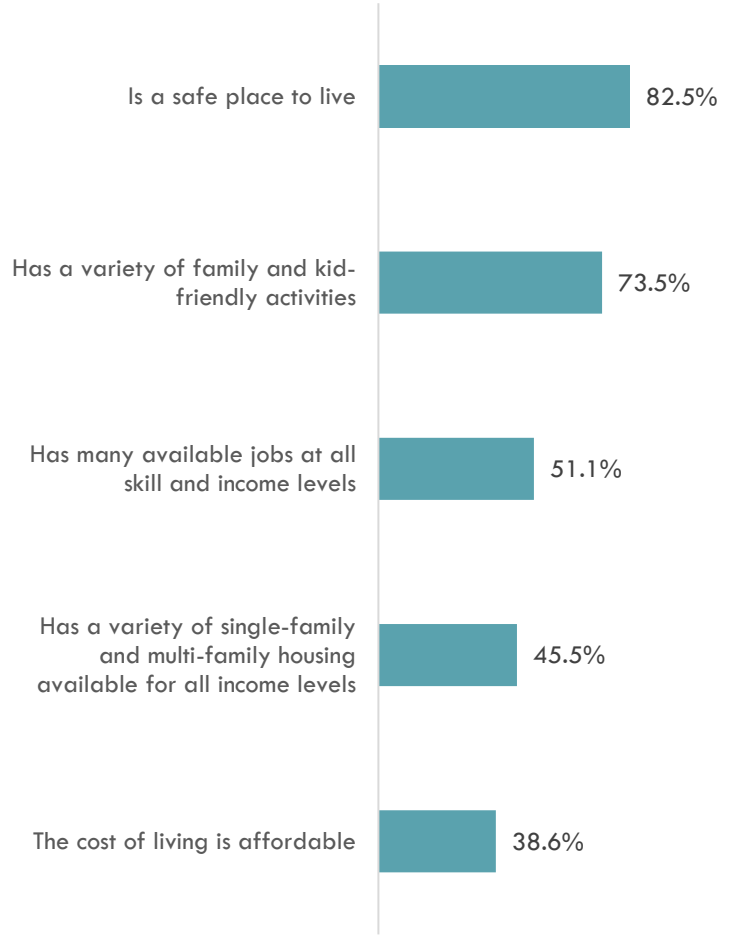
QUALITY OF LIFE

COMMUNITY DIRECTION



SLO CAL SENTIMENT

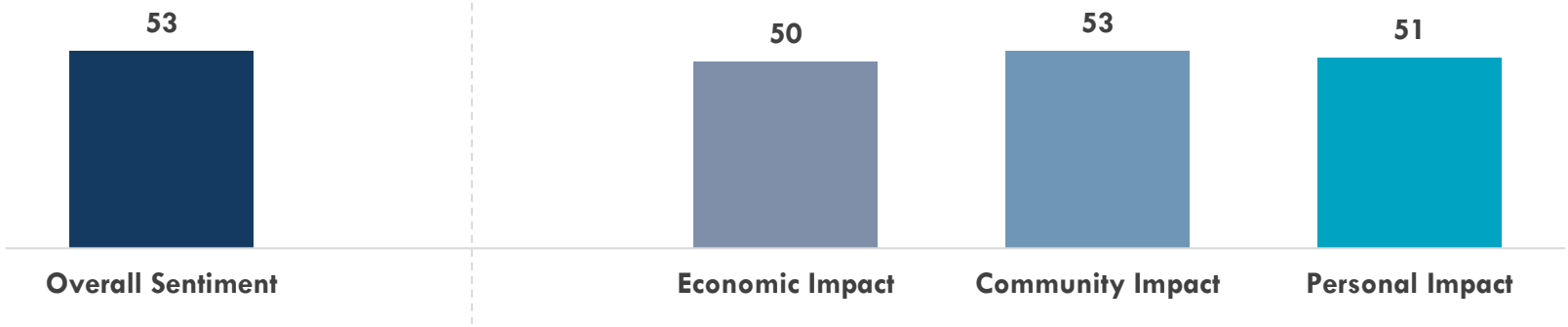
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



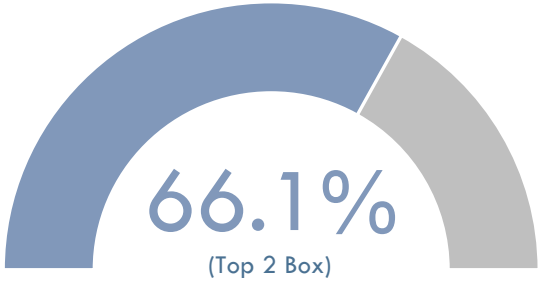
TOTAL RESIDENTS *SLO CAL Tourism Industry*

Destination Analysts

TOURISM INDUSTRY SENTIMENT INDEX

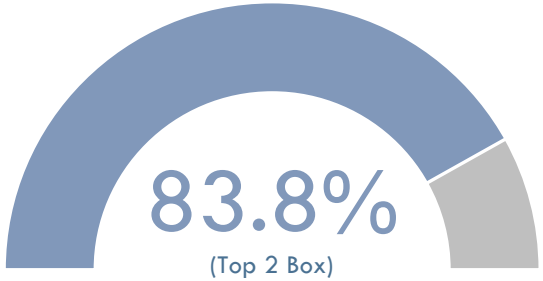


IMPACT ON QUALITY OF LIFE



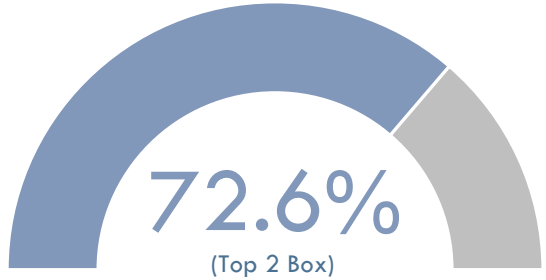
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

TOTAL RESIDENTS *Tourism Industry Employment*

Destination Analysts

Business Owners

10.4%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

20%

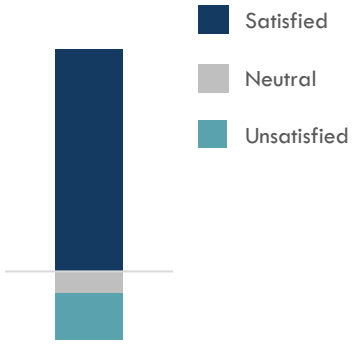
15%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

76.7%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

47.6%

DMO AWARE

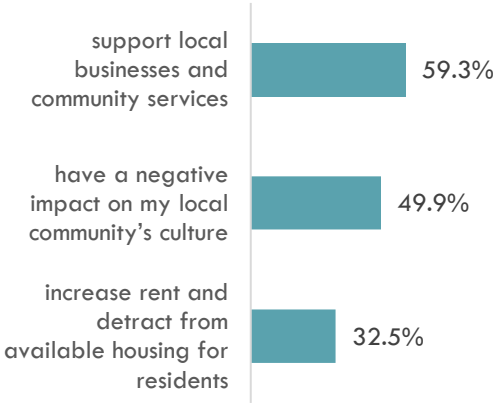
Previously Heard of Visit SLO CAL

47.1%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

62.1%

Stayed in Short-Term Vacation Rental Homes during Past Travel

GEN Z

297 COMPLETED SURVEYS

GEN Z *Who They Are*

Destination Analysts

GENDER

Female	47.2%
Male	48.7%
Other	4.1%

MARITAL STATUS

Married/Partnered	23.7%
Single	68.0%
Widowed/Divorced	2.1%
CHILDREN IN HOUSEHOLD	***23.0%***

AGE

Gen Z	100.0%
Millennial	0.0%
Gen X	0.0%
Boomer or older	0.0%
MEAN	***22.4***

ETHNICITY

White/Caucasian	40.1%
Hispanic/Latino	29.0%
African American/Black	11.8%
Asian/Pacific Islander	7.7%
Native American	3.0%

HOUSEHOLD INCOME

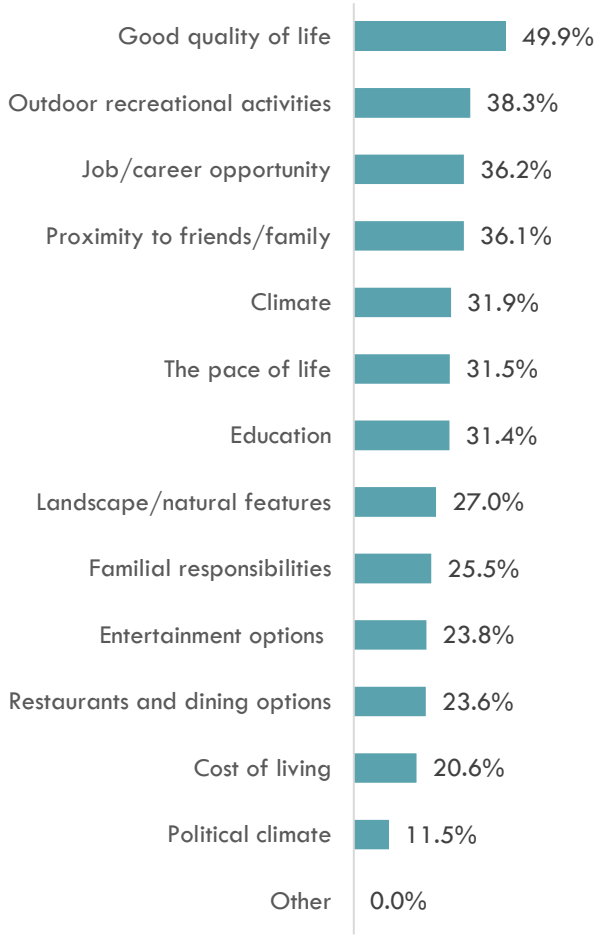
$66,055

AVERAGE ANNUAL INCOME

EMPLOYMENT

Employed Full-Time	50.7%
Employed Part-Time	34.1%
Retired	1.2%
Unemployed	14.0%

REASONS FOR STAYING IN SLO CAL

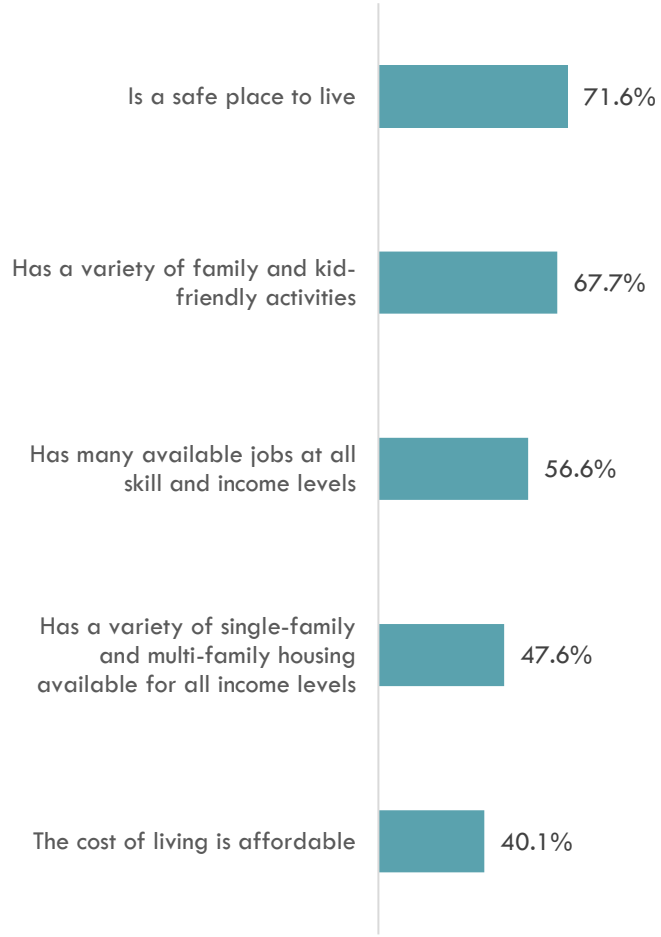


QUALITY OF LIFE

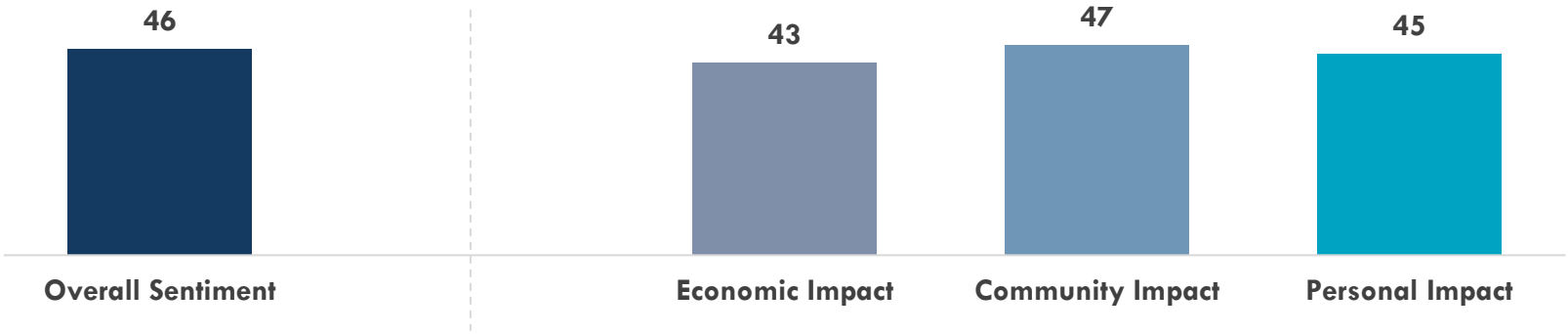
COMMUNITY DIRECTION

SLO CAL SENTIMENT

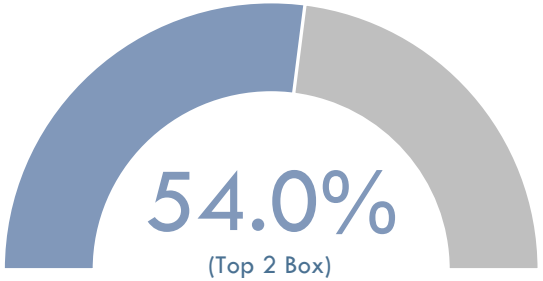
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

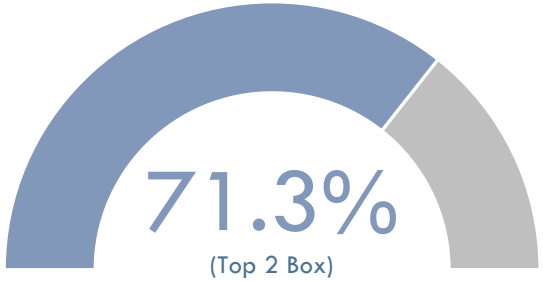


IMPACT ON QUALITY OF LIFE



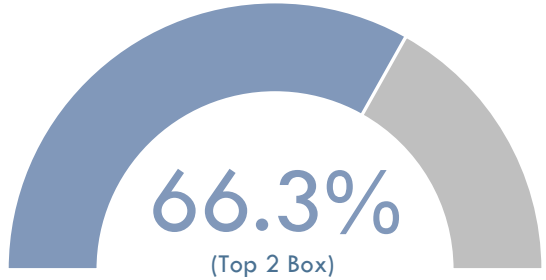
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

GEN Z *Tourism Industry Employment*

Destination Analysts

Business Owners

9.2%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

36%

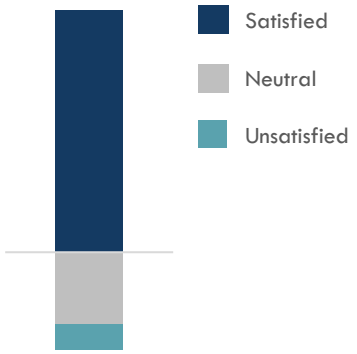
23%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

67.5%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

45.2%

DMO AWARE

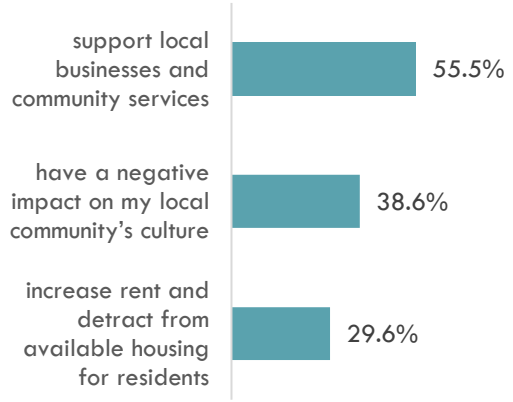
Previously Heard of Visit SLO CAL

42.1%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

64.9%

Stayed in Short-Term Vacation Rental Homes during Past Travel

MILLENNIALS

1,107 COMPLETED SURVEYS

MILLENNIALS *Who They Are*

Destination Analysts

GENDER

Female	41.8%
Male	57.2%
Other	1.0%

MARITAL STATUS

Married/Partnered	65.8%
Single	27.2%
Widowed/Divorced	4.5%
CHILDREN IN HOUSEHOLD	*71.1%*

AGE

Gen Z	0.0%
Millennial	100.0%
Gen X	0.0%
Boomer or older	0.0%
MEAN	*34.5*

ETHNICITY

White/Caucasian	64.6%
Hispanic/Latino	18.7%
African American/Black	6.9%
Asian/Pacific Islander	4.3%
Native American	1.7%

HOUSEHOLD INCOME

$95,226

AVERAGE ANNUAL INCOME

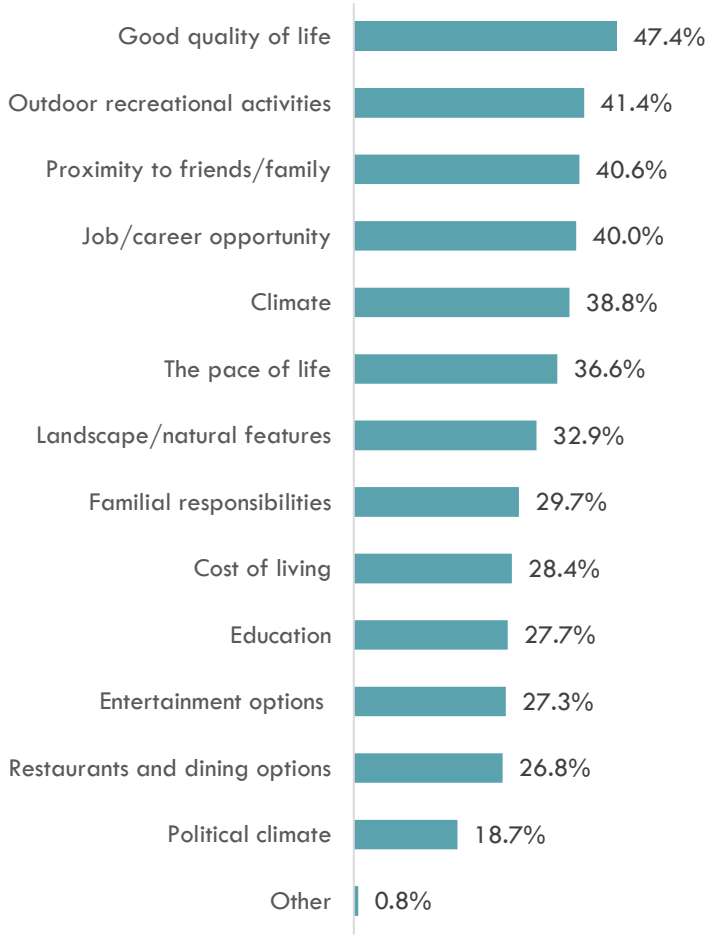
EMPLOYMENT

Employed Full-Time	78.4%
Employed Part-Time	11.7%
Retired	0.0%
Unemployed	9.8%

MILLENNIALS *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

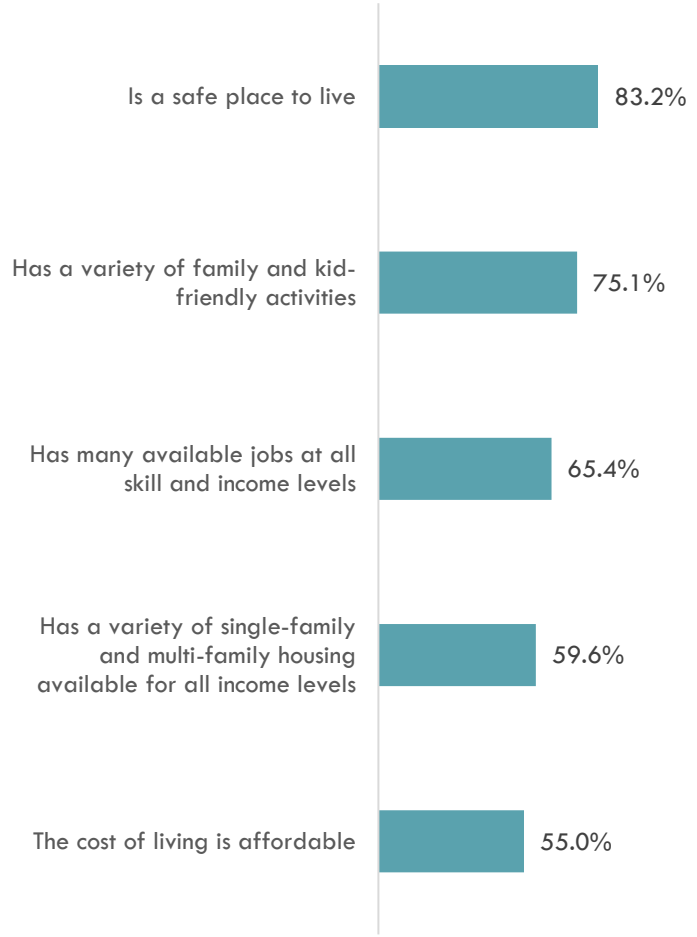


QUALITY OF LIFE

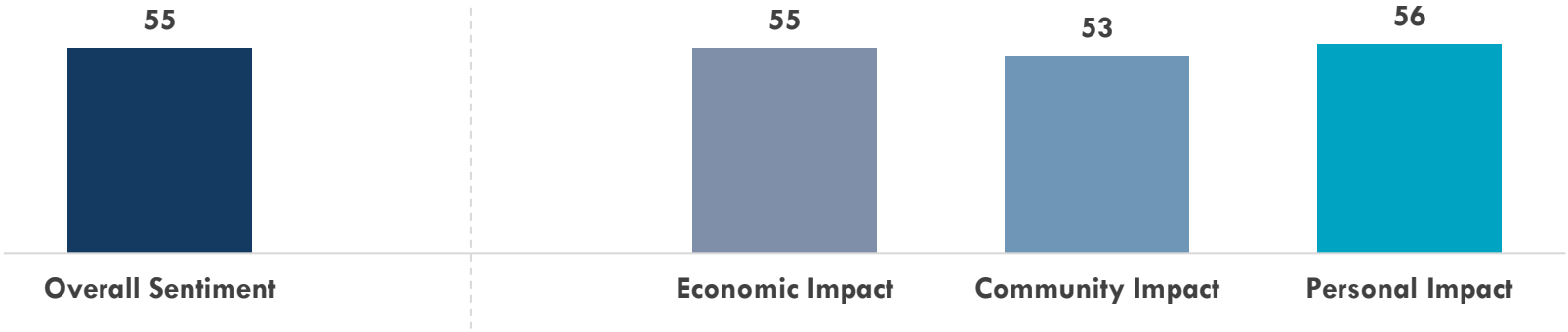
COMMUNITY DIRECTION

SLO CAL SENTIMENT

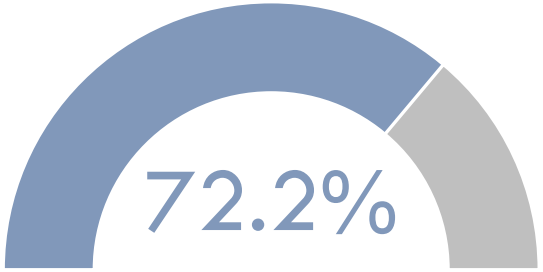
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

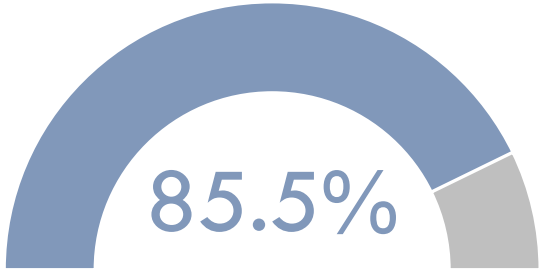


IMPACT ON QUALITY OF LIFE



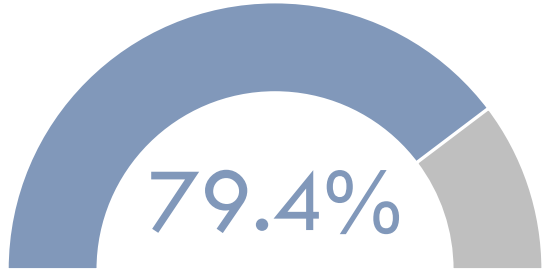
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

MILLENNIALS *Tourism Industry Employment*

Destination Analysts

Business Owners

17.8%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

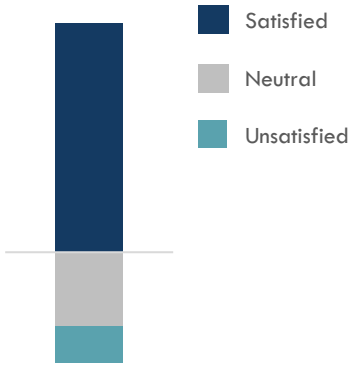
(Top 2 Box)

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

78.5%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY

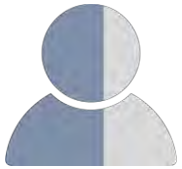


DMO AWARENESS

59.1%

DMO AWARE

Previously Heard of Visit SLO CAL

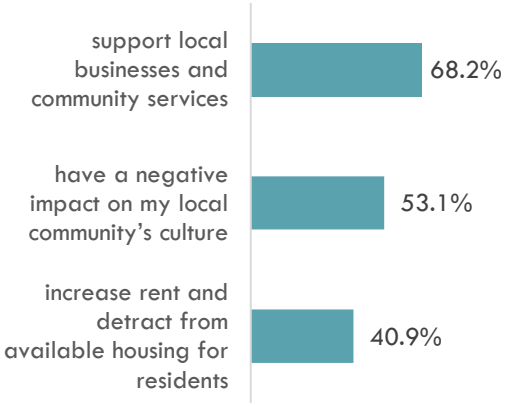


61.4%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

70.0%

Stayed in Short-Term Vacation Rental Homes during Past Travel

(Top 2 Box)

GEN X

641 COMPLETED SURVEYS

GEN X *Who They Are*

Destination Analysts

GENDER

Female	46.6%
Male	52.8%
Other	0.6%

MARITAL STATUS

Married/Partnered	68.1%
Single	15.4%
Widowed/Divorced	12.1%
CHILDREN IN HOUSEHOLD	*56.1%*

AGE

Gen Z	0.0%
Millennial	0.0%
Gen X	100.0%
Boomer or older	0.0%
MEAN	*48.1*

ETHNICITY

White/Caucasian	65.2%
Hispanic/Latino	11.2%
African American/Black	11.8%
Native American	3.0%
Asian/Pacific Islander	7.7%

HOUSEHOLD INCOME

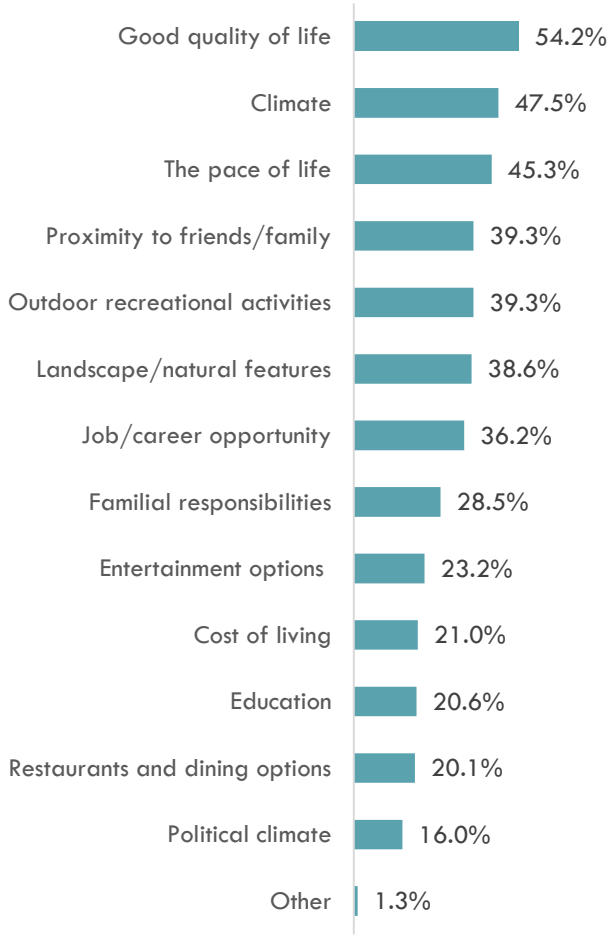
$94,830

AVERAGE ANNUAL INCOME

EMPLOYMENT

Employed Full-Time	75.6%
Employed Part-Time	12.0%
Retired	2.2%
Unemployed	10.2%

REASONS FOR STAYING IN SLO CAL

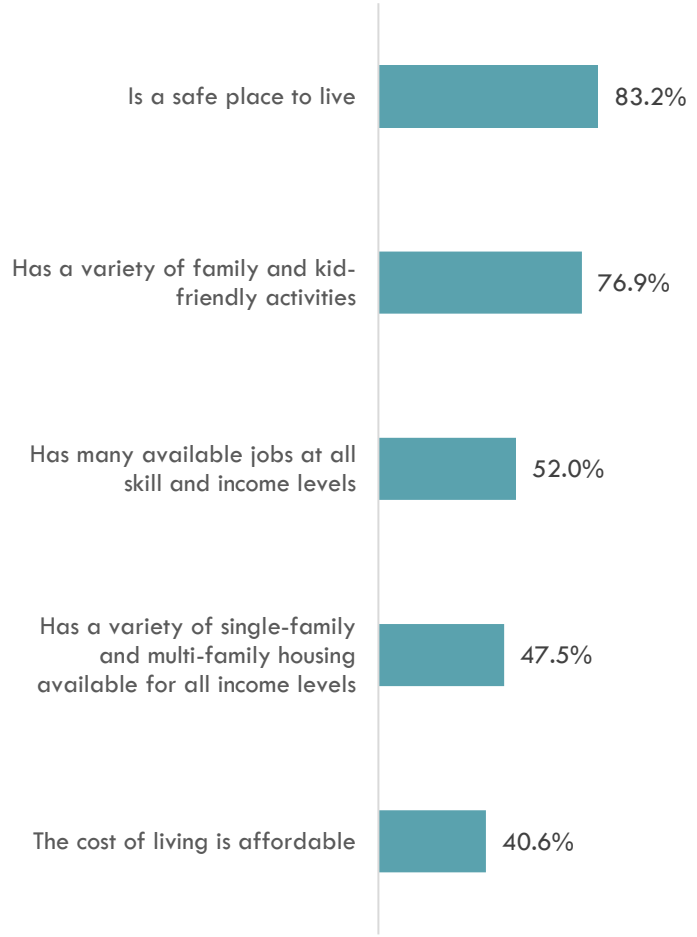


QUALITY OF LIFE

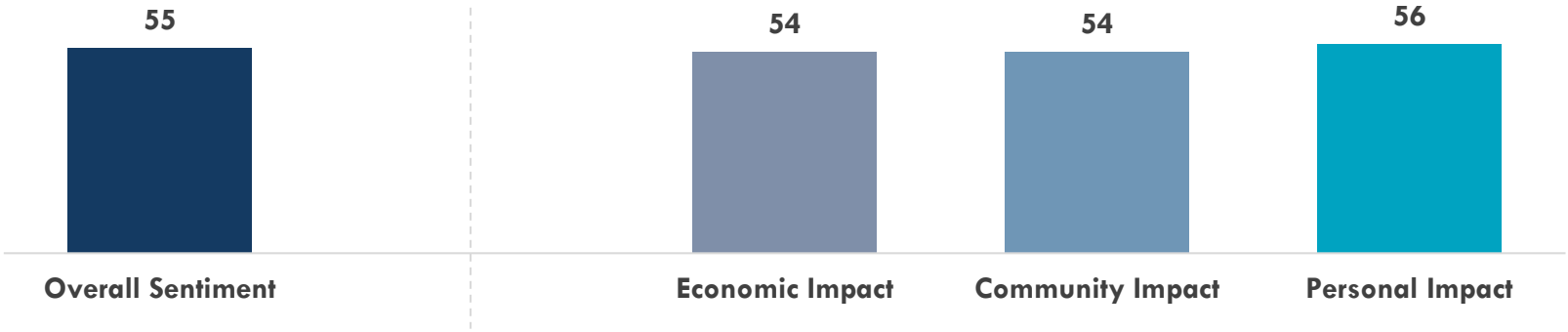
COMMUNITY DIRECTION

SLO CAL SENTIMENT

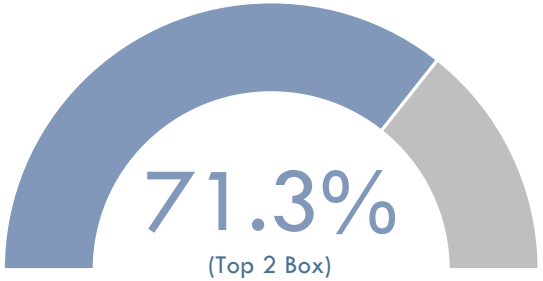
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

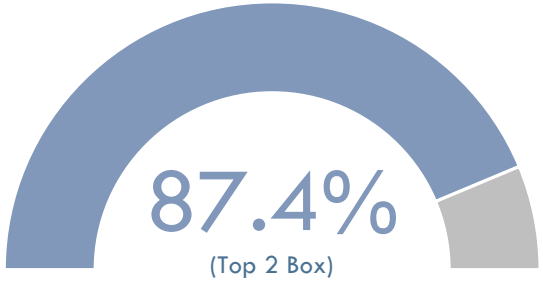


IMPACT ON QUALITY OF LIFE



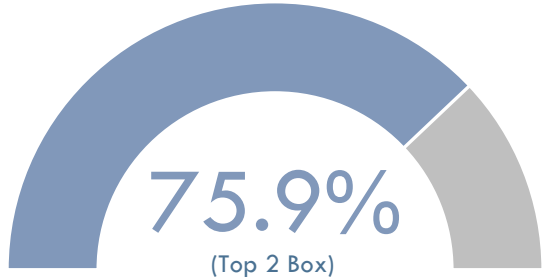
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

Business Owners

12.1%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

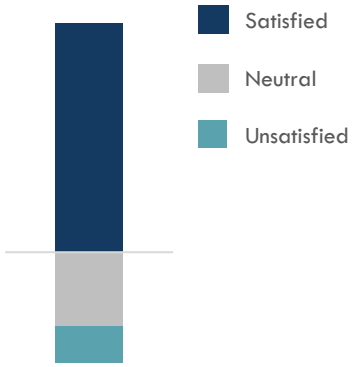
CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

79.5%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

50.9%

DMO AWARE

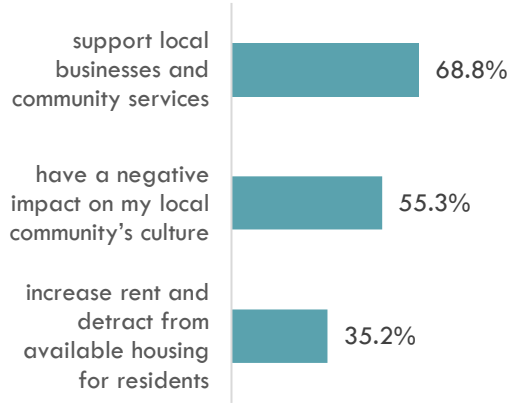
Previously Heard of Visit SLO CAL

50.1%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

69.1%

Stayed in Short-Term Vacation Rental Homes during Past Travel

BOOMERS+

475 COMPLETED SURVEYS

BOOMERS+ *Who They Are*

Destination Analysts

GENDER

Female	54.8%
Male	44.9%
Other	0.4%

MARITAL STATUS

Married/Partnered	59.8%
Single	11.7%
Widowed/Divorced	22.8%
CHILDREN IN HOUSEHOLD	*4.4%*

AGE

Gen Z	0.0%
Millennial	0.0%
Gen X	0.0%
Boomer or older	100.0%
MEAN	*70.5*

ETHNICITY

White/Caucasian	81.1%
Hispanic/Latino	5.1%
Asian/Pacific Islander	2.3%
African American/Black	1.7%
Native American	1.3%

HOUSEHOLD INCOME

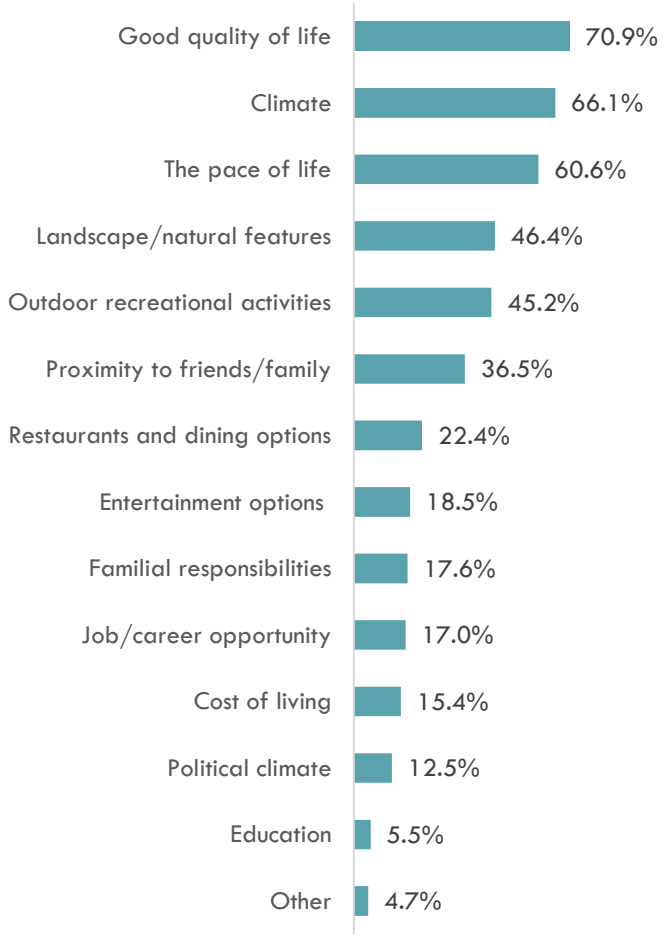
$81,545

AVERAGE ANNUAL INCOME

EMPLOYMENT

Employed Full-Time	16.6%
Employed Part-Time	13.1%
Retired	66.2%
Unemployed	4.1%

REASONS FOR STAYING IN SLO CAL

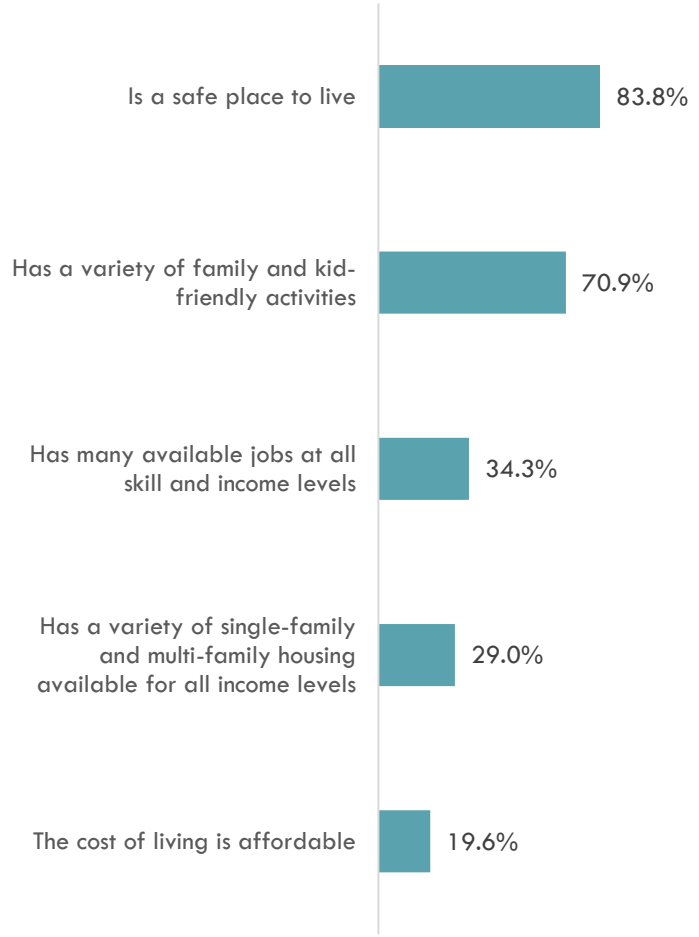


QUALITY OF LIFE

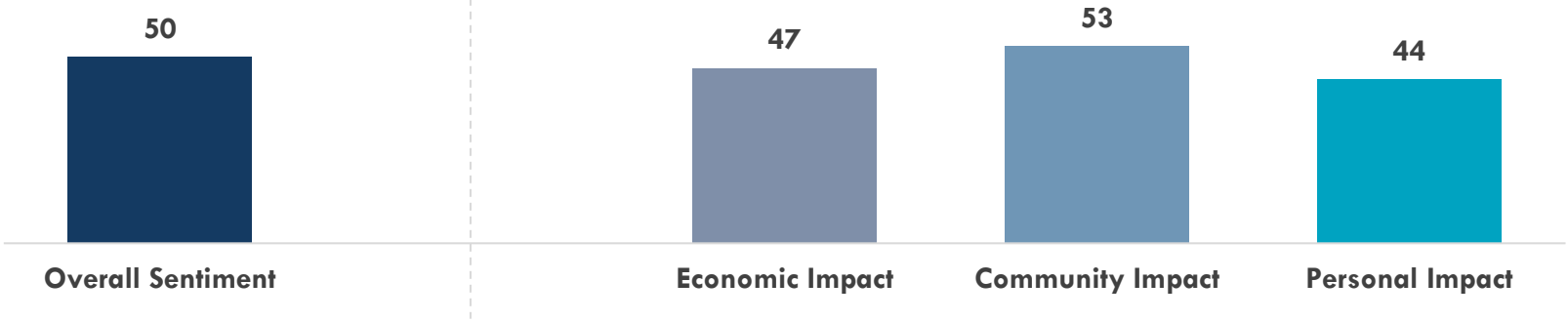
COMMUNITY DIRECTION

SLO CAL SENTIMENT

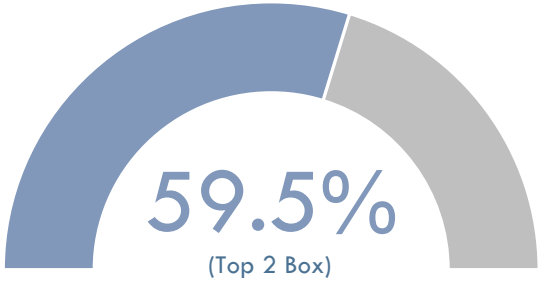
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

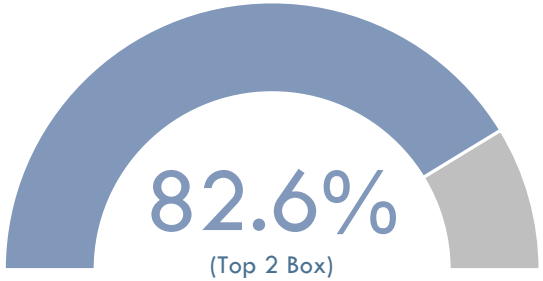


IMPACT ON QUALITY OF LIFE



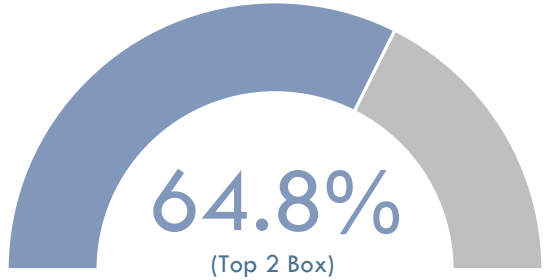
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

Business Owners

2.2%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

3%

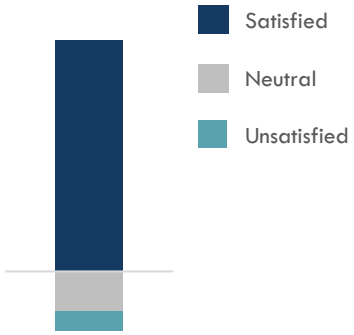
12%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

71.4%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

34.1%

DMO AWARE

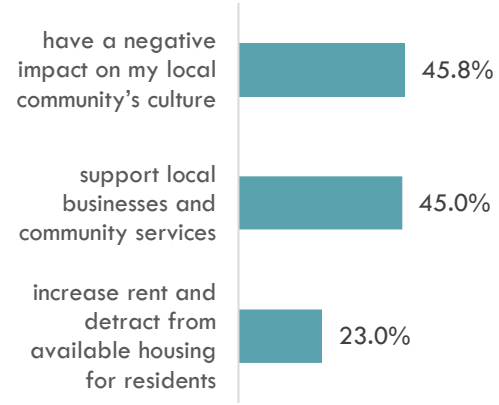
Previously Heard of Visit SLO CAL

5.1%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

48.7%

Stayed in Short-Term Vacation Rental Homes during Past Travel

WHITE/ CAUCASIAN

1,637 COMPLETED SURVEYS

WHITE/CAUCASIAN *Who They Are*

Destination Analysts

GENDER

Female	47.5%
Male	51.7%
Other	0.8%

MARITAL STATUS

Married/Partnered	63.7%
Single	20.1%
Widowed/Divorced	12.9%
CHILDREN IN HOUSEHOLD	*40.0%*

AGE

Gen Z	5.9%
Millennial	35.4%
Gen X	20.7%
Boomer or older	38.0%
MEAN	*50.4*

ETHNICITY

White/Caucasian	100.0%
Hispanic/Latino	0.0%
Asian/Pacific Islander	0.0%
African American/Black	0.0%
Native American	0.0%

HOUSEHOLD INCOME

$90,216

AVERAGE ANNUAL INCOME

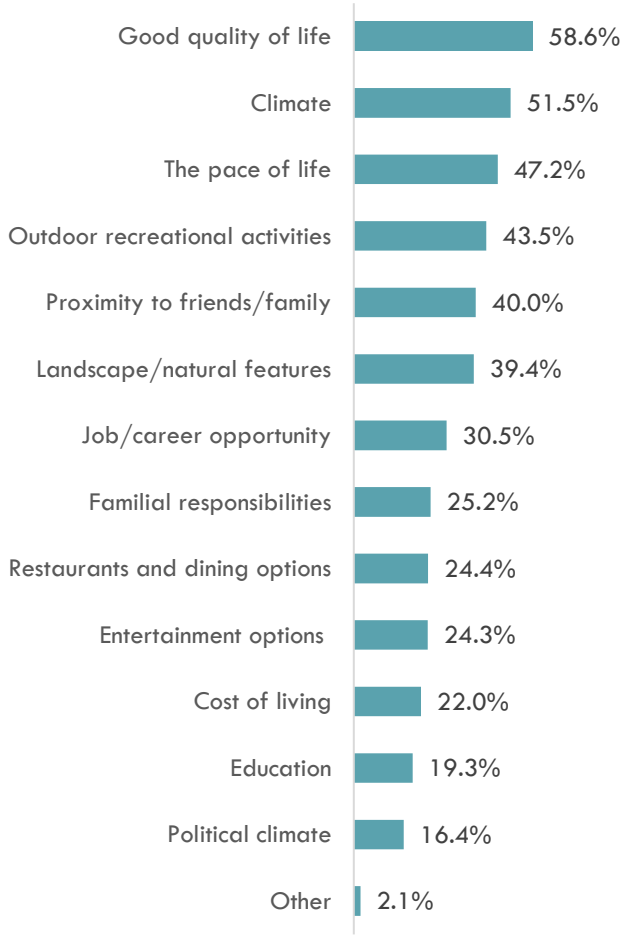
EMPLOYMENT

Employed Full-Time	52.1%
Employed Part-Time	14.0%
Retired	26.0%
Unemployed	7.9%

WHITE/CAUCASIAN *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

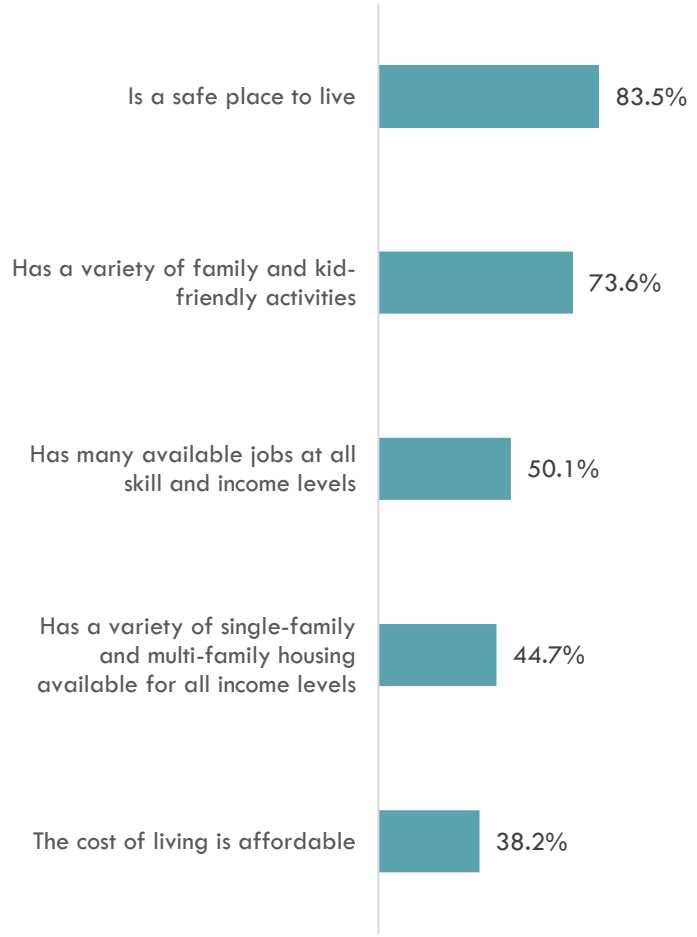


QUALITY OF LIFE

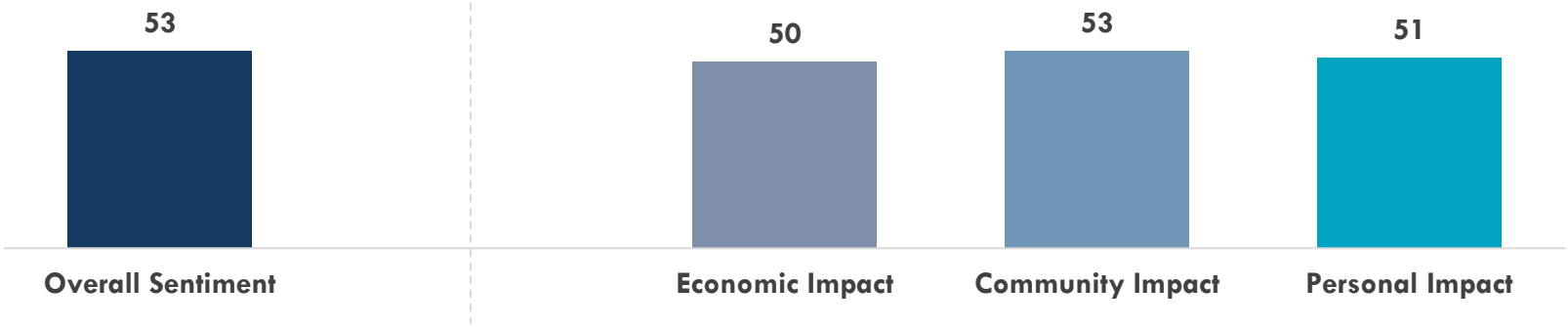
COMMUNITY DIRECTION

SLO CAL SENTIMENT

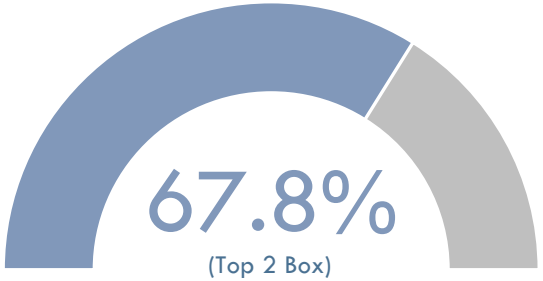
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX



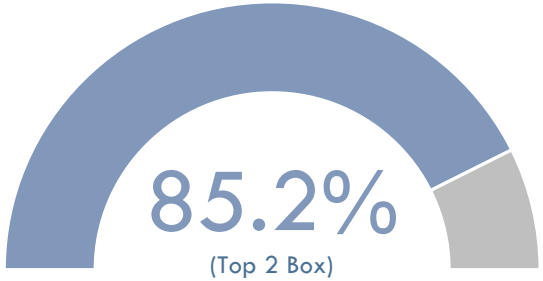
IMPACT ON QUALITY OF LIFE



(Top 2 Box)

"I believe tourism in my community makes it a better place to live"

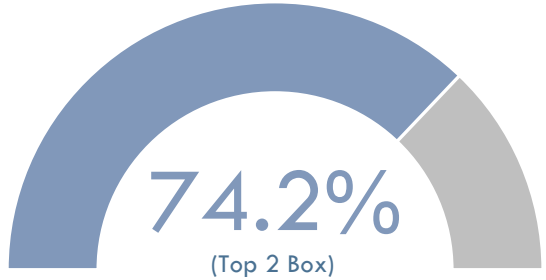
IMPACT ON SLO CAL'S ECONOMY



(Top 2 Box)

Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



(Top 2 Box)

"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

WHITE/CAUCASIAN *Tourism Industry Employment*

Destination Analysts

Business Owners

10.6%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

18%

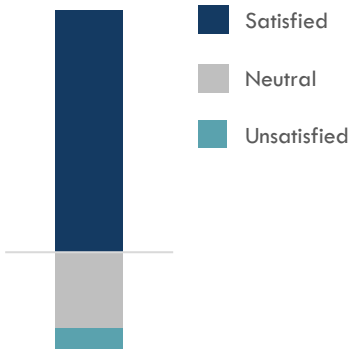
14%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

78.5%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

48.5%

DMO AWARE

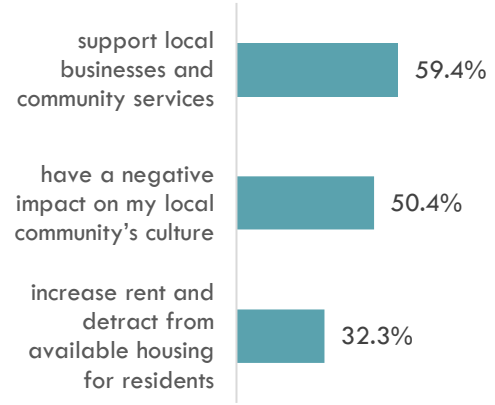
Previously Heard of Visit SLO CAL

46.9%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

62.4%

Stayed in Short-Term Vacation Rental Homes during Past Travel

HISPANIC/ LATINO

389 COMPLETED SURVEYS

HISPANIC/LATINO *Who They Are*

Destination Analysts

GENDER

Female	49.5%
Male	49.5%
Other	1.0%

MARITAL STATUS

Married/Partnered	46.2%
Single	40.1%
Widowed/Divorced	8.7%
CHILDREN IN HOUSEHOLD	*50.4%*

AGE

Gen Z	21.0%
Millennial	49.9%
Gen X	17.4%
Boomer or older	11.7%
MEAN	*37.6*

ETHNICITY

Hispanic/Latino	100.0%
White/Caucasian	0.0%
Asian/Pacific Islander	0.0%
African American/Black	0.0%
Native American	0.0%

HOUSEHOLD INCOME

$74,651

AVERAGE ANNUAL INCOME

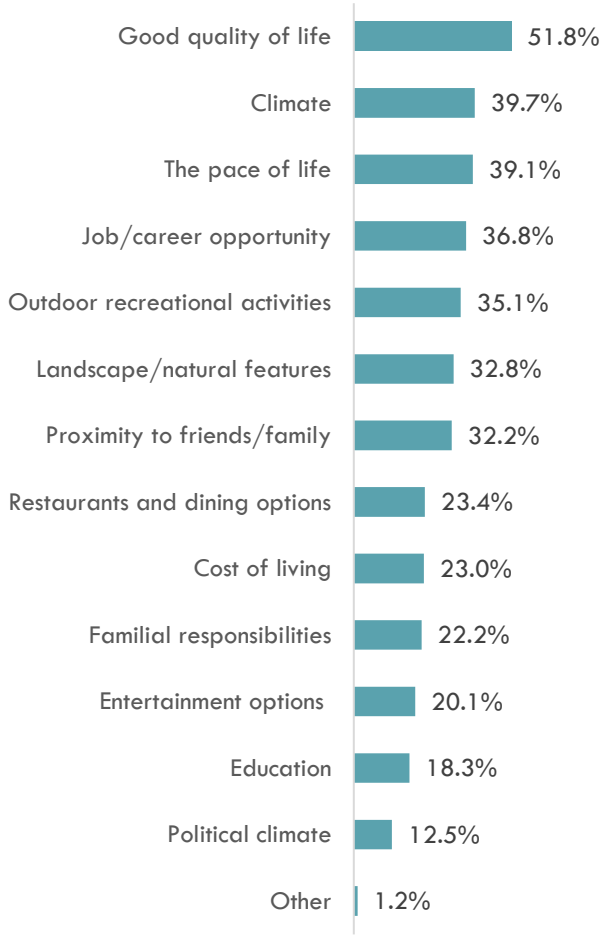
EMPLOYMENT

Employed Full-Time	65.9%
Employed Part-Time	15.6%
Retired	8.9%
Unemployed	9.6%

HISPANIC/LATINO *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

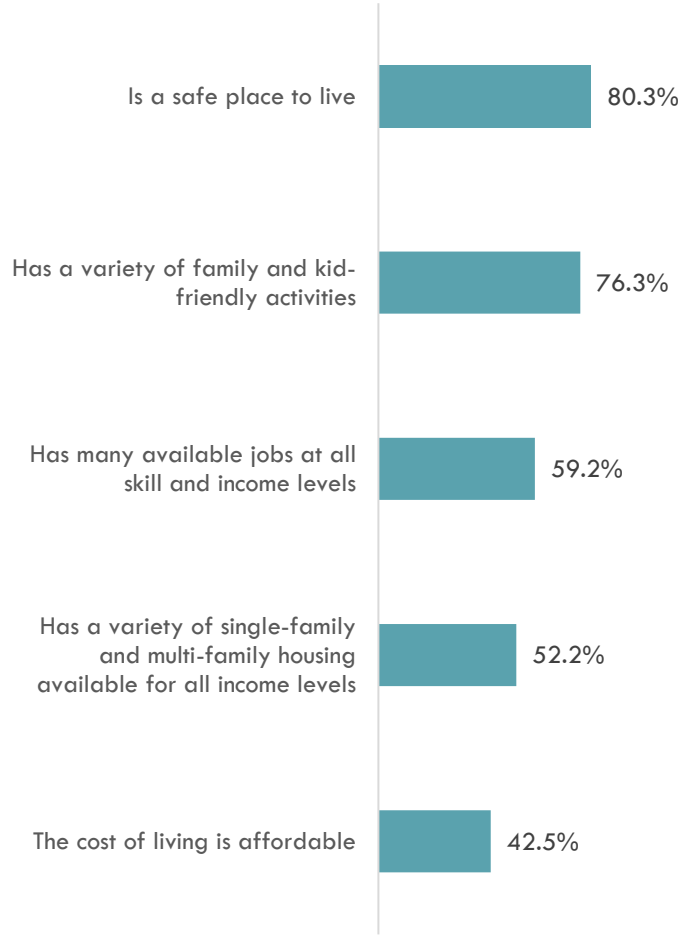


QUALITY OF LIFE

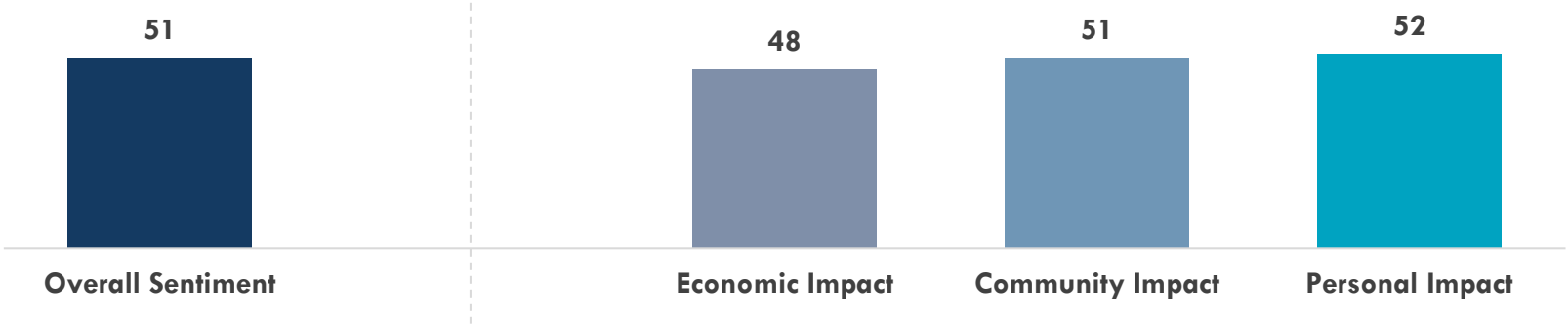
COMMUNITY DIRECTION

SLO CAL SENTIMENT

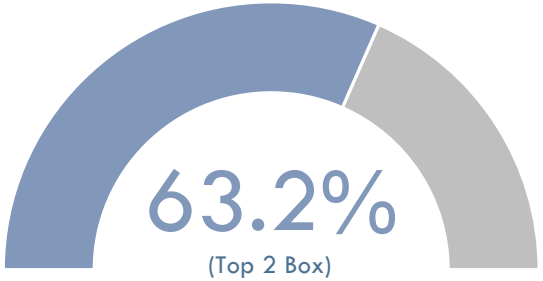
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

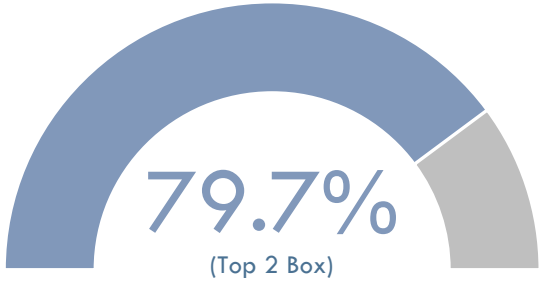


IMPACT ON QUALITY OF LIFE



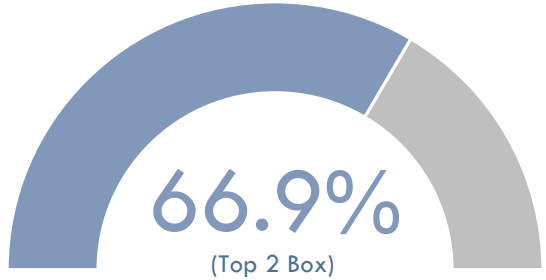
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

HISPANIC/LATINO *Tourism Industry Employment*

Destination Analysts

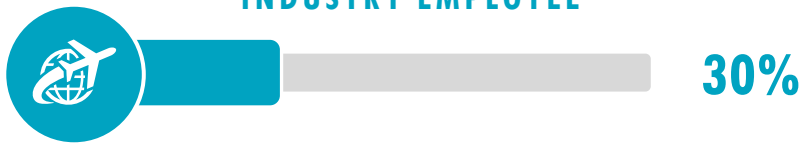
Business Owners

8.9%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

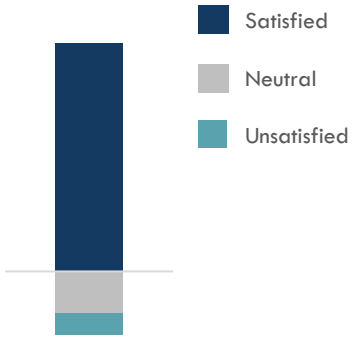


FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

71.6%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

45.0%

DMO AWARE

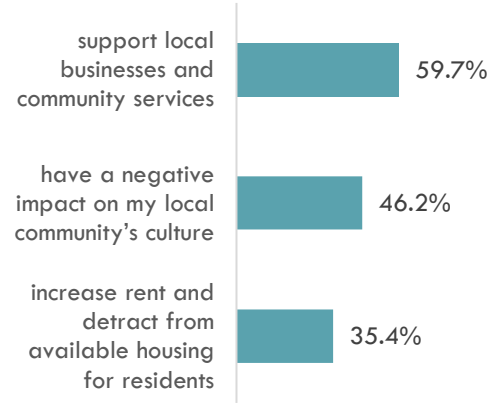
Previously Heard of Visit SLO CAL

48.0%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

56.7%

Stayed in Short-Term Vacation Rental Homes during Past Travel

ANY POC

787 COMPLETED SURVEYS

ANY POC *Who They Are*

Destination Analysts

GENDER

Female	47.5%
Male	51.1%
Other	1.4%

MARITAL STATUS

Married/Partnered	49.5%
Single	37.3%
Widowed/Divorced	8.6%
CHILDREN IN HOUSEHOLD	*49.7%*

AGE

Gen Z	19.9%
Millennial	44.2%
Gen X	22.7%
Boomer or older	13.2%
MEAN	*39.2*

ETHNICITY

Hispanic/Latino	49.4%
African American/Black	21.9%
Asian/Pacific Islander	13.5%
Native American	7.8%
White/Caucasian	0.0%

HOUSEHOLD INCOME

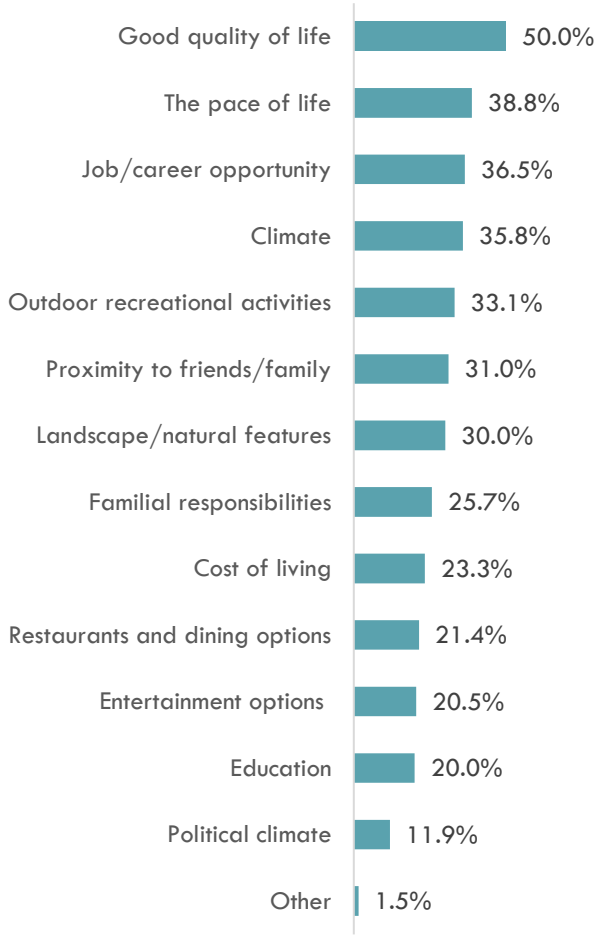
$80,016

AVERAGE ANNUAL INCOME

EMPLOYMENT

Employed Full-Time	67.8%
Employed Part-Time	14.6%
Retired	8.2%
Unemployed	9.4%

REASONS FOR STAYING IN SLO CAL

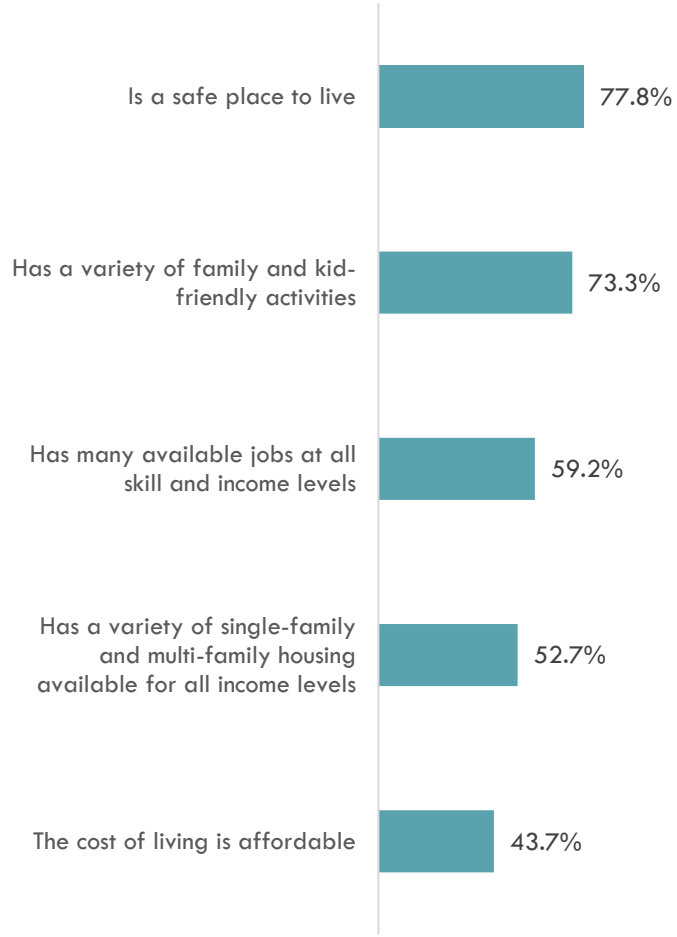


QUALITY OF LIFE

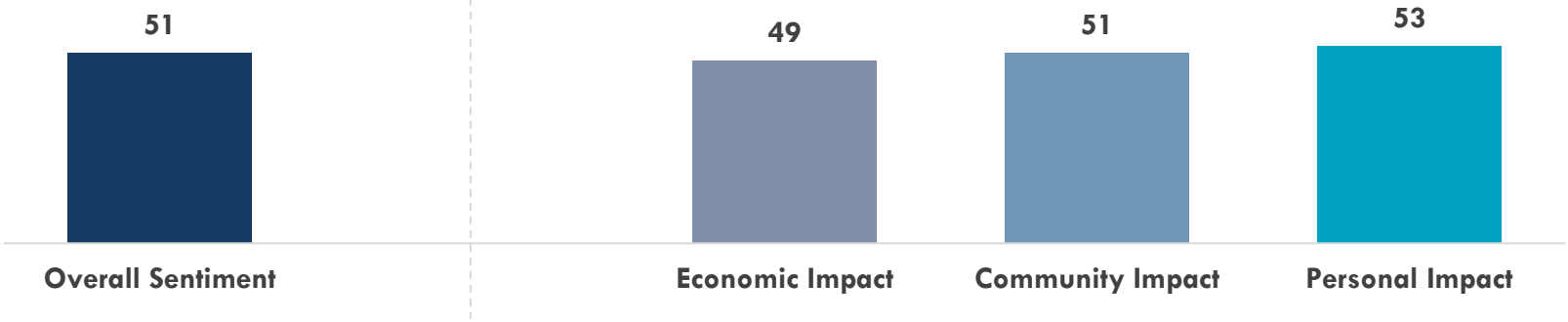
COMMUNITY DIRECTION

SLO CAL SENTIMENT

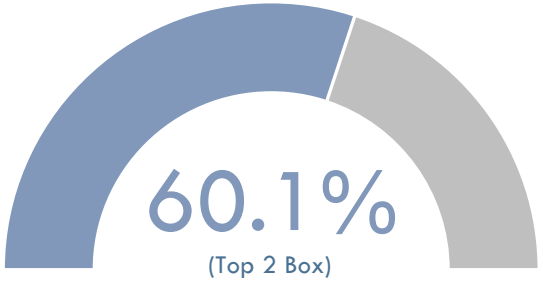
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

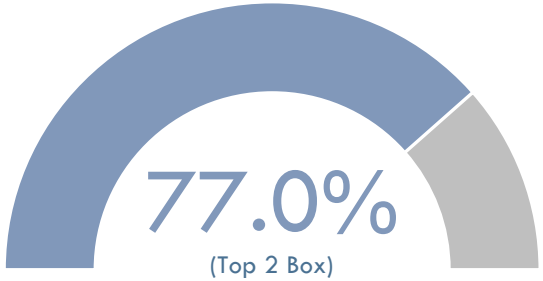


IMPACT ON QUALITY OF LIFE



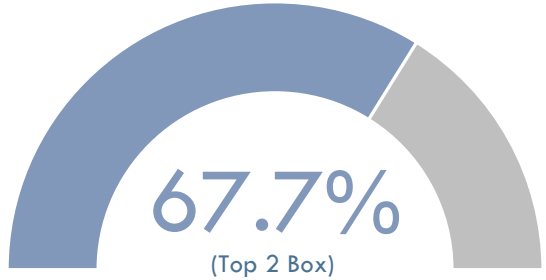
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

ANY POC *Tourism Industry Employment*

Destination Analysts

Business Owners

10.3%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

33%

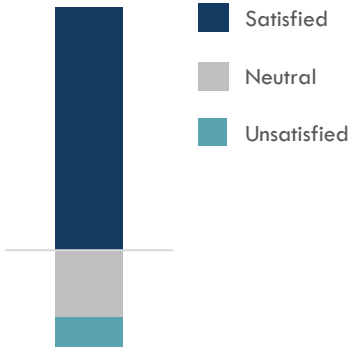
15%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

70.2%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

45.6%

DMO AWARE

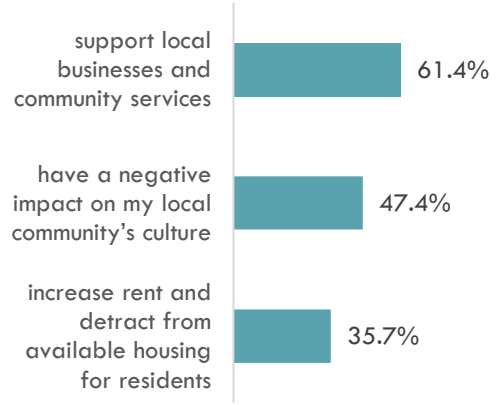
Previously Heard of Visit SLO CAL

52.0%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

62.4%

Stayed in Short-Term Vacation Rental Homes during Past Travel

TRANSPLANTS

2,122 COMPLETED SURVEYS

TRANSPLANTS *Who They Are*

Destination Analysts

GENDER

Female	47.6%
Male	51.5%
Other	0.8%

MARITAL STATUS

Married/Partnered	61.5%
Single	22.0%
Widowed/Divorced	12.6%
CHILDREN IN HOUSEHOLD	*41.3%*

AGE

Gen Z	7.7%
Millennial	35.8%
Gen X	20.3%
Boomer or older	36.3%
MEAN	*49.4*

ETHNICITY

White/Caucasian	64.3%
Hispanic/Latino	15.9%
African American/Black	7.1%
Asian/Pacific Islander	4.6%
Native American	2.5%

HOUSEHOLD INCOME

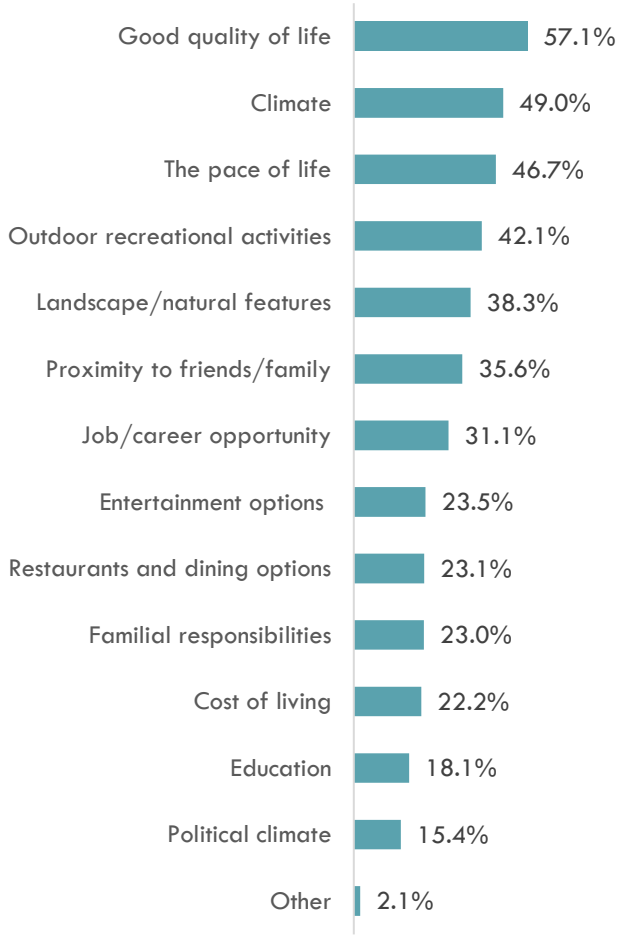
$89,782

AVERAGE ANNUAL INCOME

EMPLOYMENT

Employed Full-Time	53.8%
Employed Part-Time	13.7%
Retired	25.0%
Unemployed	7.5%

REASONS FOR STAYING IN SLO CAL

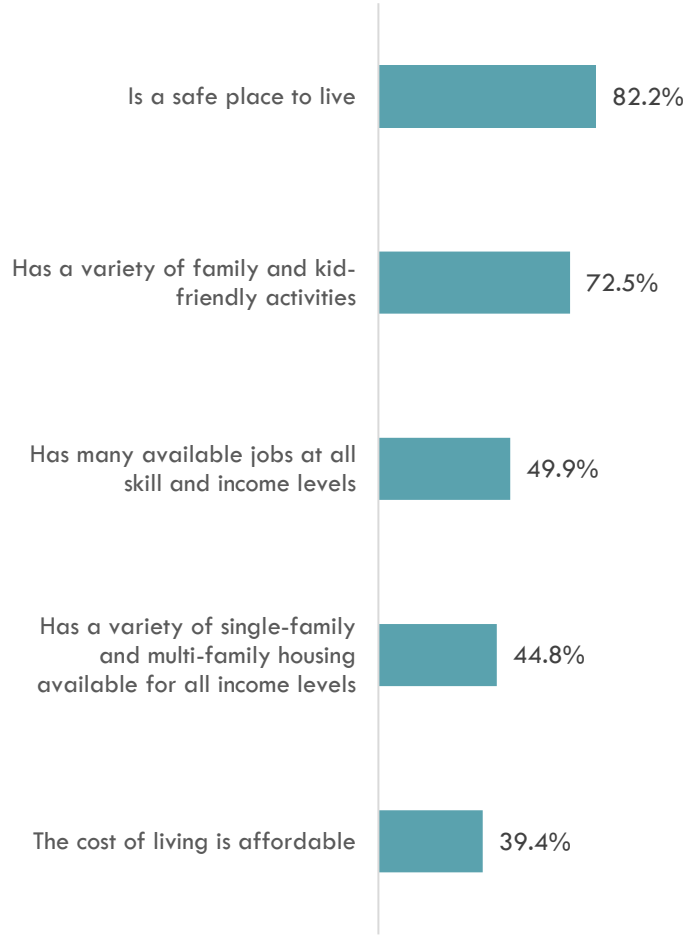


QUALITY OF LIFE

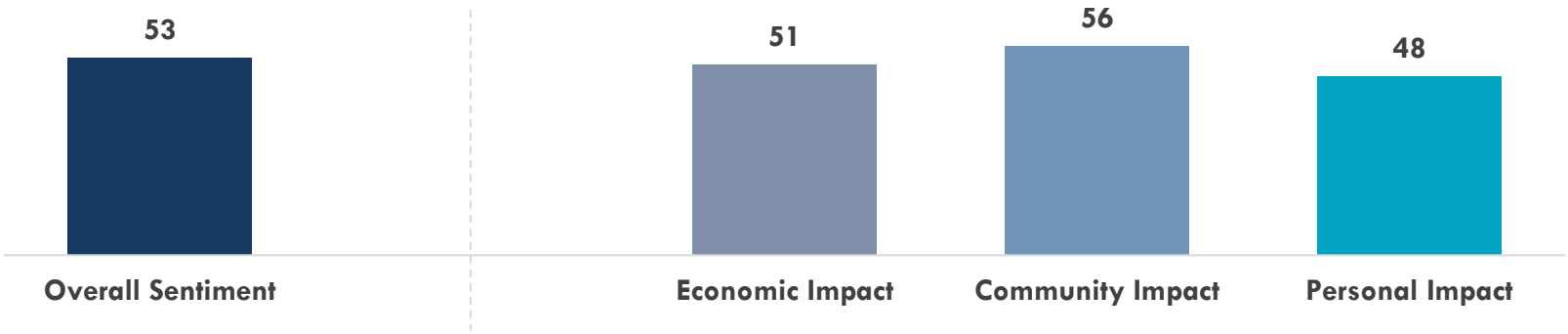
COMMUNITY DIRECTION

SLO CAL SENTIMENT

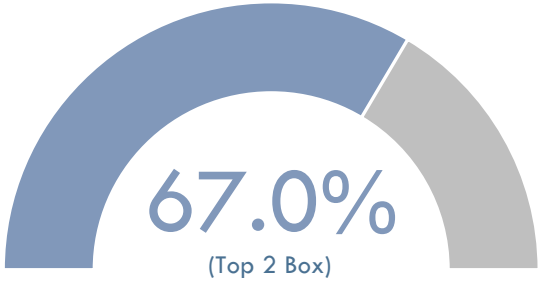
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

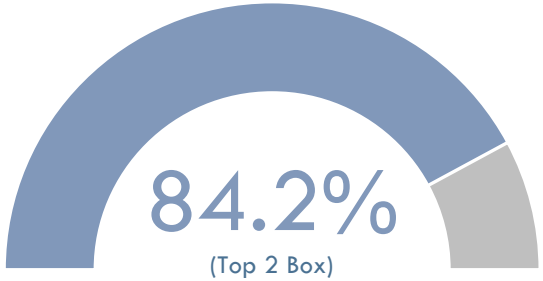


IMPACT ON QUALITY OF LIFE



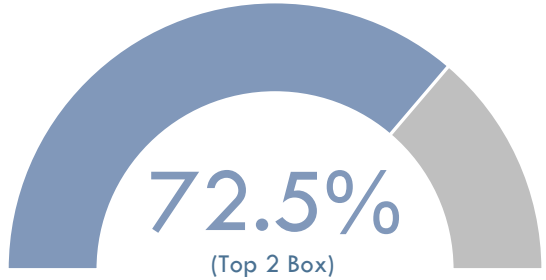
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

TRANSPLANTS *Tourism Industry Employment*

Destination Analysts

Business Owners

11.5%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

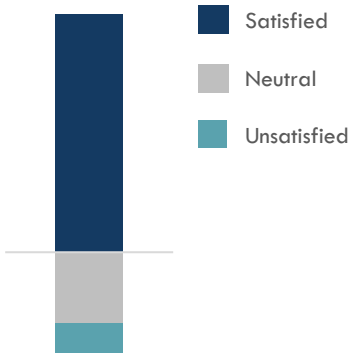
CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

78.4%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

50.4%

DMO AWARE

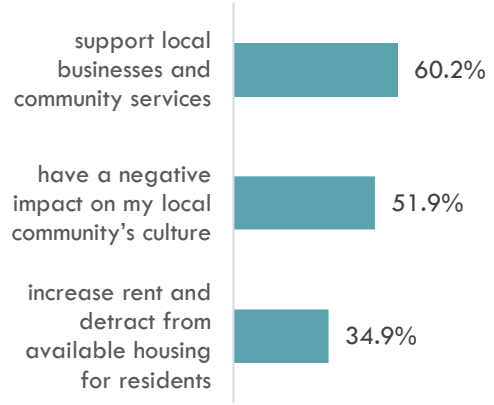
Previously Heard of Visit SLO CAL

47.7%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

64.1%

Stayed in Short-Term Vacation Rental Homes during Past Travel

SLO CAL NATIVES

398 COMPLETED SURVEYS

SLO CAL NATIVES *Who They Are*

Destination Analysts

GENDER

Female	48.2%
Male	50.3%
Other	1.6%

MARITAL STATUS

Married/Partnered	56.7%
Single	26.5%
Widowed/Divorced	10.1%
CHILDREN IN HOUSEHOLD	*39.9%*

AGE

Gen Z	10.3%
Millennial	39.2%
Gen X	25.8%
Boomer or older	24.8%
MEAN	*45.7*

ETHNICITY

White/Caucasian	68.6%
Hispanic/Latino	12.8%
African American/Black	5.5%
Asian/Pacific Islander	2.3%
Native American	1.8%

HOUSEHOLD INCOME

$79,445

AVERAGE ANNUAL INCOME

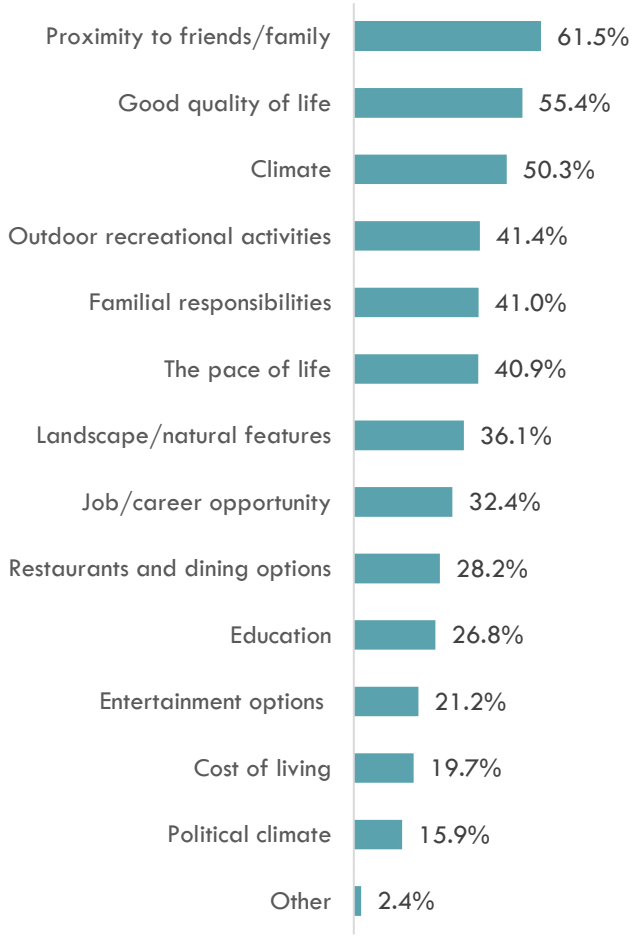
EMPLOYMENT

Employed Full-Time	56.9%
Employed Part-Time	16.2%
Retired	14.8%
Unemployed	12.2%

SLO CAL NATIVES *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

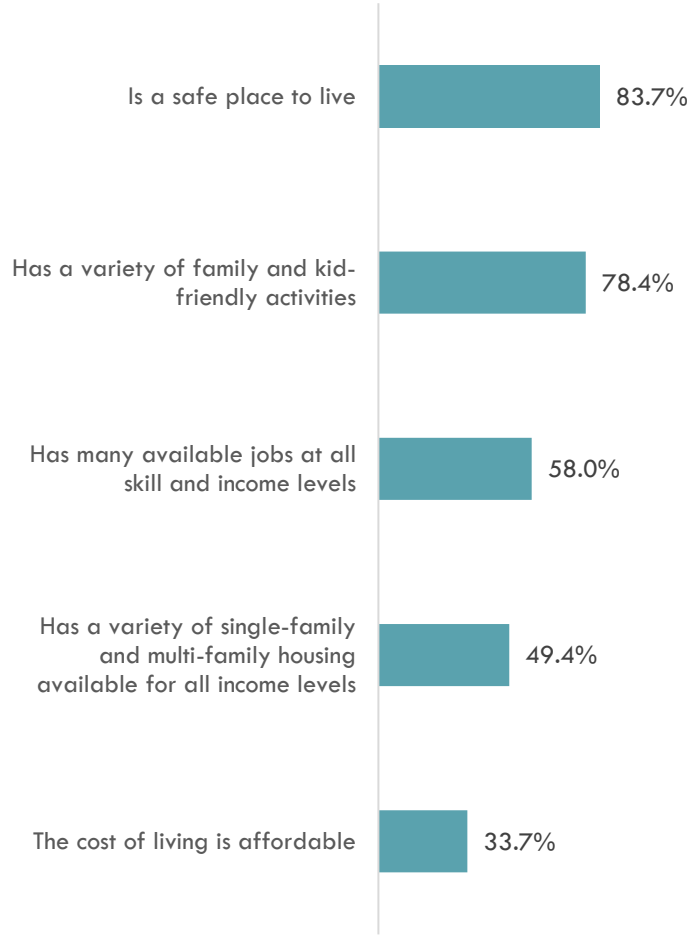


QUALITY OF LIFE

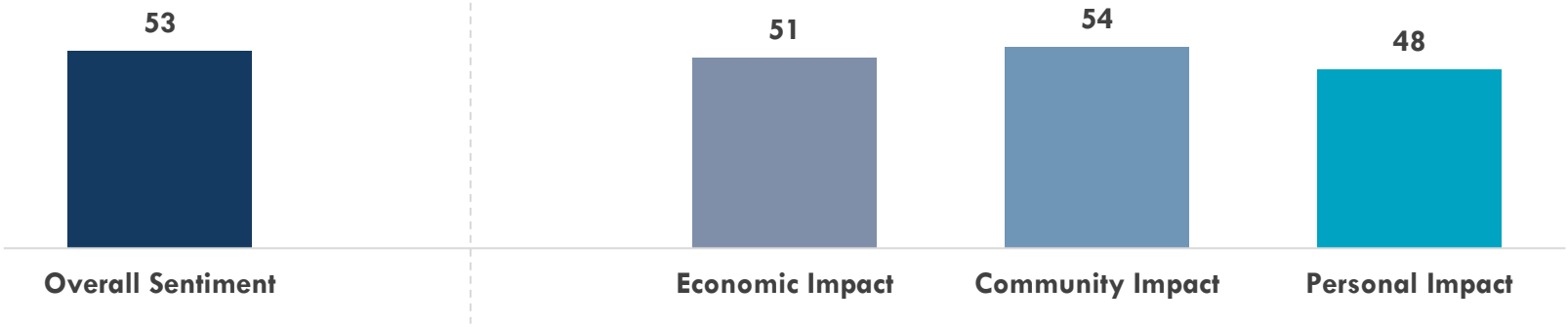
COMMUNITY DIRECTION

SLO CAL SENTIMENT

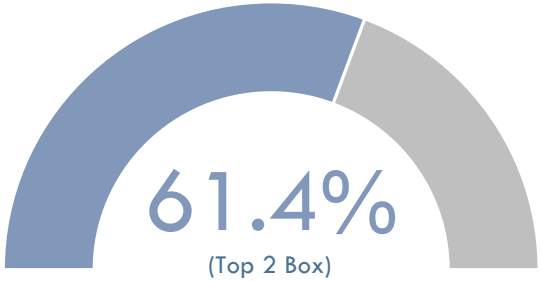
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

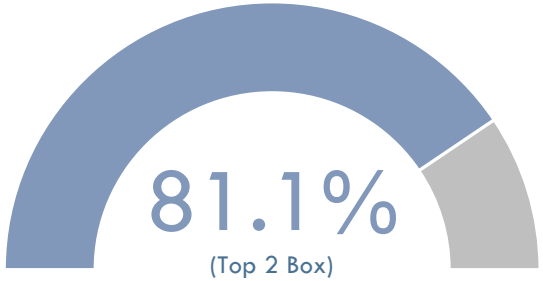


IMPACT ON QUALITY OF LIFE



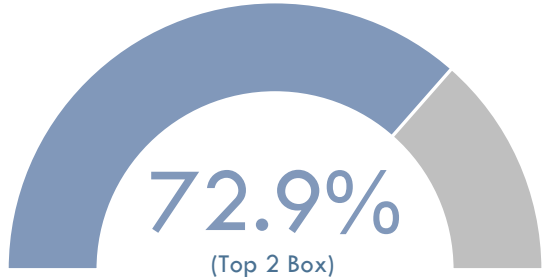
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

SLO CAL NATIVES *Tourism Industry Employment*

Destination Analysts

Business Owners

4.8%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

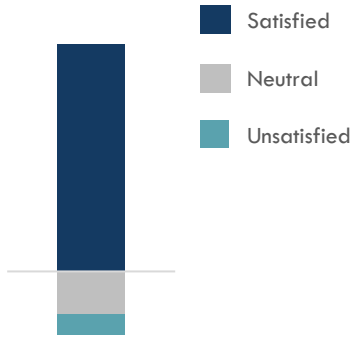
CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

63.3%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

32.5%

DMO AWARE

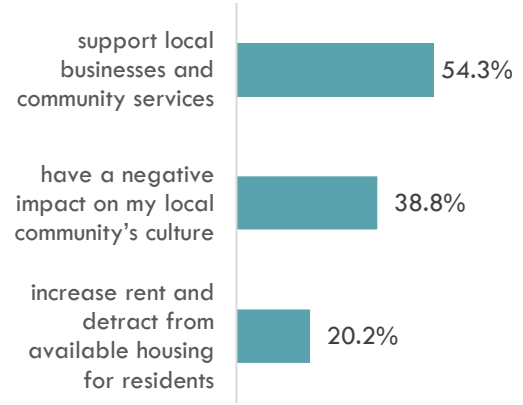
Previously Heard of Visit SLO CAL

41.8%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

51.1%

Stayed in Short-Term Vacation Rental Homes during Past Travel

RECENT MOVERS

318 COMPLETED SURVEYS

RECENT MOVERS *Who They Are*

Destination Analysts

GENDER

Female	43.4%
Male	56.2%
Other	0.4%

MARITAL STATUS

Married/Partnered	80.7%
Single	12.3%
Widowed/Divorced	5.8%
CHILDREN IN HOUSEHOLD	*100.0%*

AGE

Gen Z	7.9%
Millennial	62.3%
Gen X	27.6%
Boomer or older	2.2%
MEAN	*37.8*

ETHNICITY

White/Caucasian	59.7%
Hispanic/Latino	18.2%
African American/Black	3.5%
Asian/Pacific Islander	6.0%
Native American	3.5%

HOUSEHOLD INCOME

$101,563

AVERAGE ANNUAL INCOME

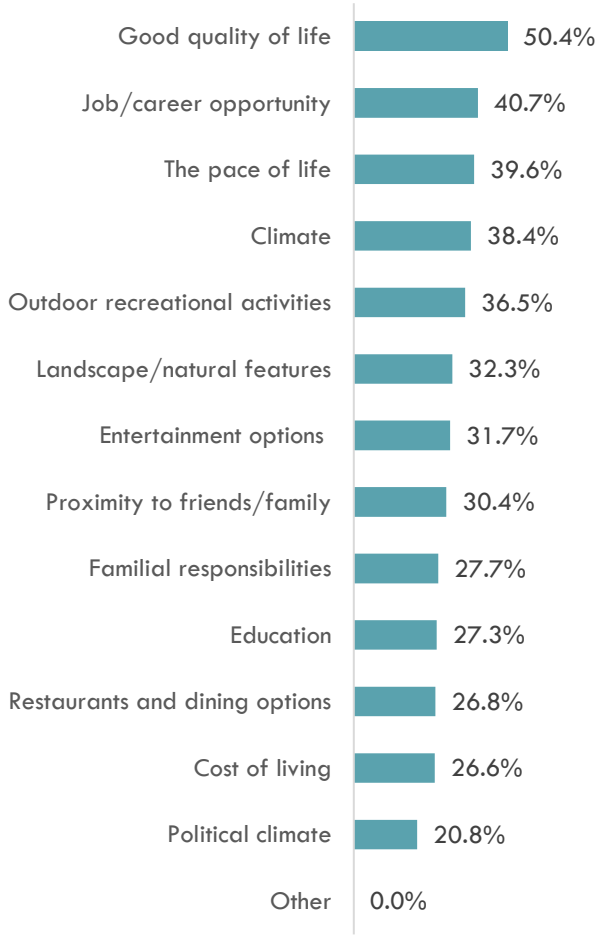
EMPLOYMENT

Employed Full-Time	81.9%
Employed Part-Time	12.8%
Retired	1.0%
Unemployed	4.3%

RECENT MOVERS *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

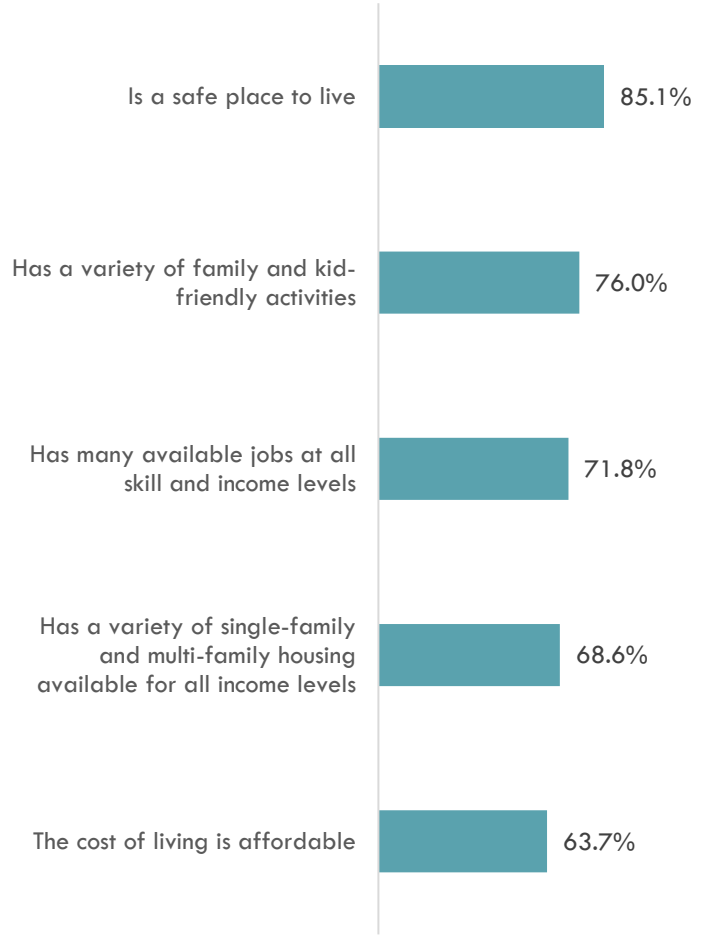


QUALITY OF LIFE

COMMUNITY DIRECTION

SLO CAL SENTIMENT

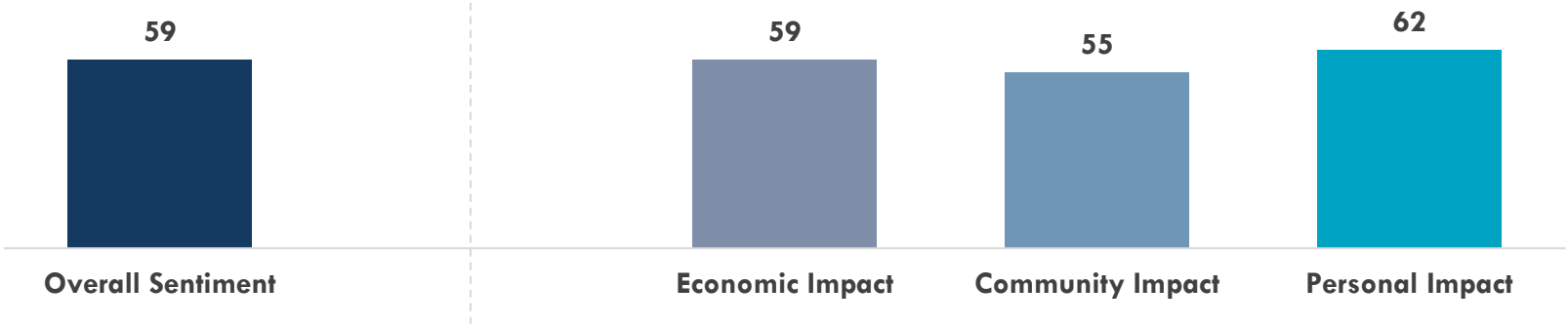
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



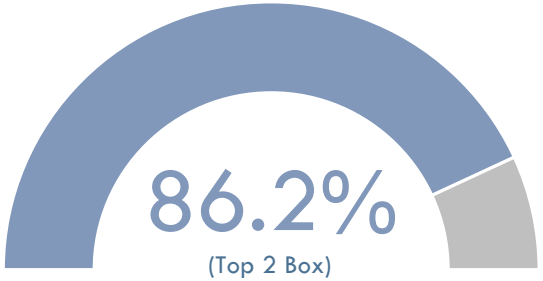
RECENT MOVERS *SLO CAL Tourism Industry*

Destination Analysts

TOURISM INDUSTRY SENTIMENT INDEX

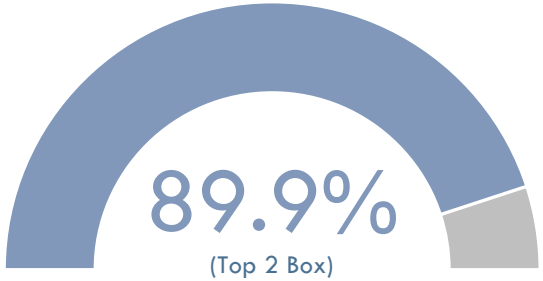


IMPACT ON QUALITY OF LIFE



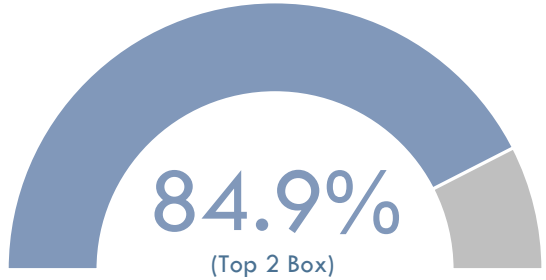
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

RECENT MOVERS *Tourism Industry Employment*

Destination Analysts

Business Owners

17.7%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

41%

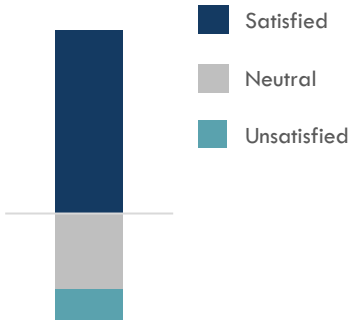
11%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

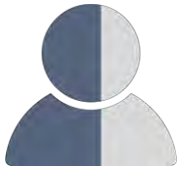
SLO CAL TOURISM EMPLOYMENT SATISFACTION

84.1%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS



58.8%

DMO AWARE

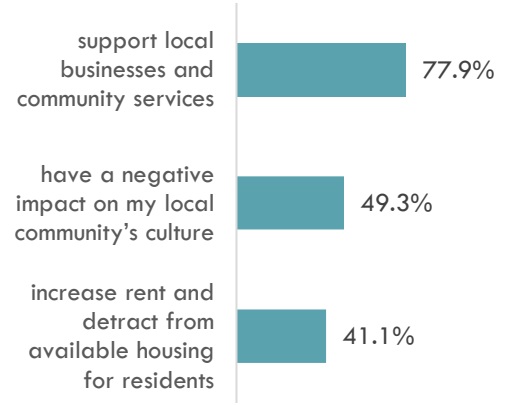
Previously Heard of Visit SLO CAL

66.6%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

79.6%

Stayed in Short-Term Vacation Rental Homes during Past Travel

ESTABLISHED FAMILIES

453 COMPLETED SURVEYS

ESTABLISHED FAMILIES *Who They Are*

Destination Analysts

GENDER

Female	36.3%
Male	63.5%
Other	0.2%

MARITAL STATUS

Married/Partnered	83.9%
Single	8.6%
Widowed/Divorced	6.1%
CHILDREN IN HOUSEHOLD	*100.0%*

AGE

Gen Z	2.8%
Millennial	72.3%
Gen X	22.9%
Boomer or older	2.0%
MEAN	*38.2*

ETHNICITY

White/Caucasian	69.3%
Hispanic/Latino	17.0%
African American/Black	6.0%
Asian/Pacific Islander	4.0%
Native American	1.8%

HOUSEHOLD INCOME

$109,827

AVERAGE ANNUAL INCOME

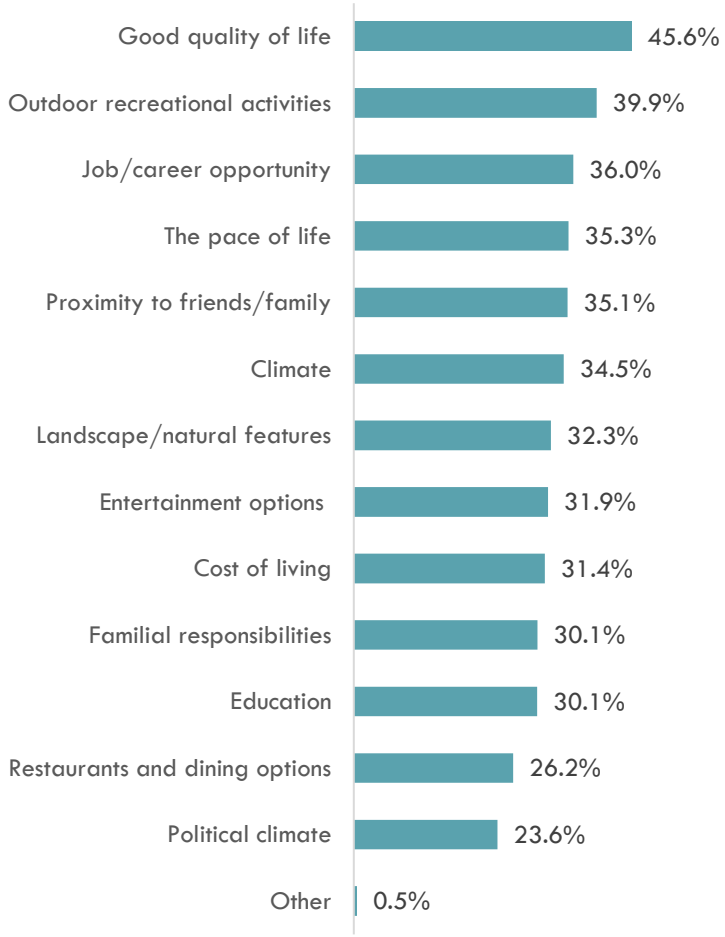
EMPLOYMENT

Employed Full-Time	84.4%
Employed Part-Time	6.8%
Retired	1.7%
Unemployed	7.1%

ESTABLISHED FAMILIES *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

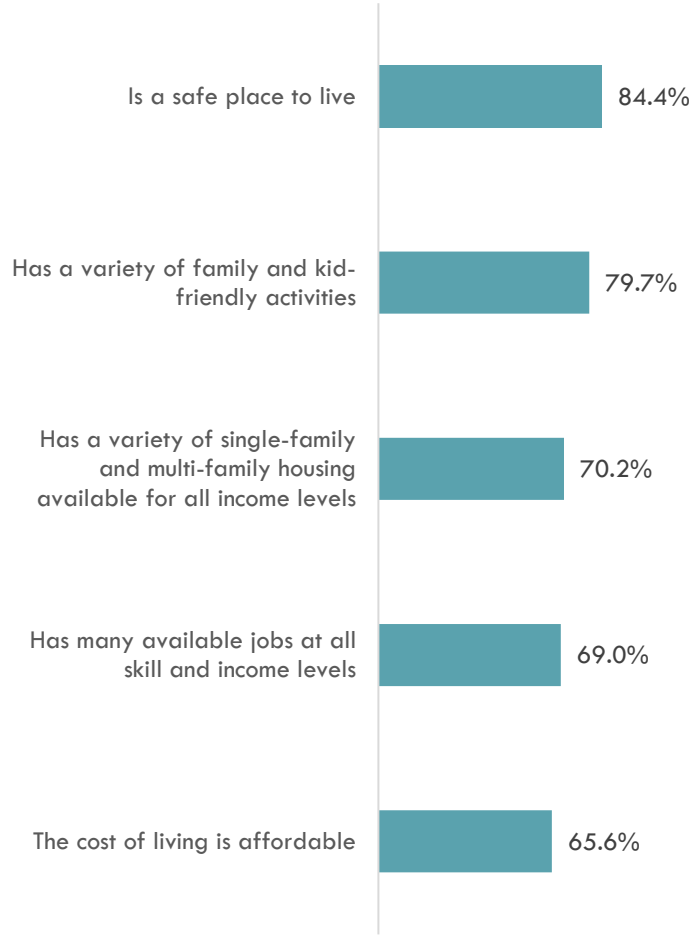


QUALITY OF LIFE

COMMUNITY DIRECTION

SLO CAL SENTIMENT

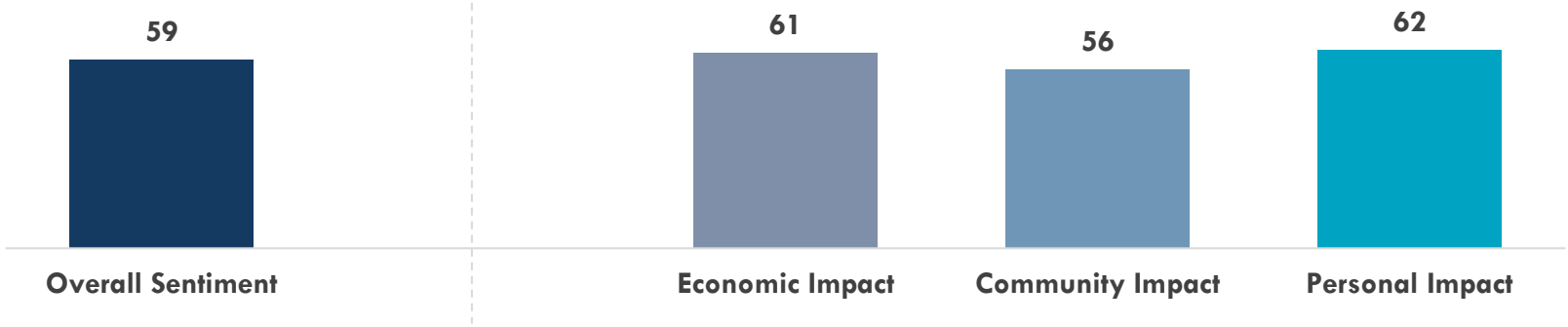
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



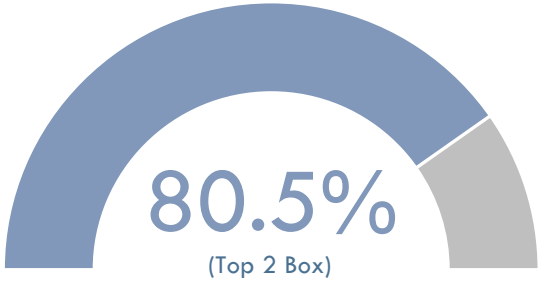
ESTABLISHED FAMILIES *SLO CAL Tourism Industry*

Destination Analysts

TOURISM INDUSTRY SENTIMENT INDEX

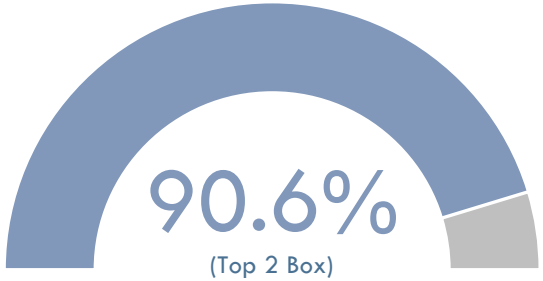


IMPACT ON QUALITY OF LIFE



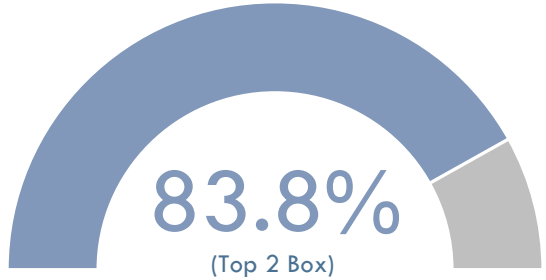
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

ESTABLISHED FAMILIES *Tourism Industry Employment*

Destination Analysts

Business Owners

25.1%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

31%

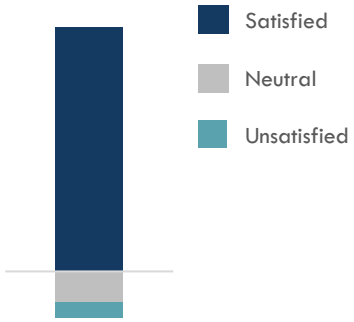
14%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

82.9%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

70.2%

DMO AWARE

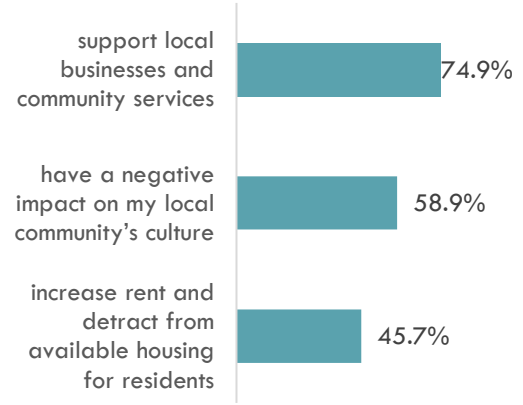
Previously Heard of Visit SLO CAL

68.8%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

83.8%

Stayed in Short-Term Vacation Rental Homes during Past Travel

DEEP-ROOTED FAMILIES

209 COMPLETED SURVEYS

DEEP-ROOTED FAMILIES *Who They Are*

Destination Analysts

GENDER

Female	54.3%
Male	45.1%
Other	0.5%

MARITAL STATUS

Married/Partnered	74.8%
Single	8.4%
Widowed/Divorced	13.0%
CHILDREN IN HOUSEHOLD	*100.0%*

AGE

Gen Z	3.7%
Millennial	44.8%
Gen X	40.4%
Boomer or older	11.1%
MEAN	*43.8*

ETHNICITY

White/Caucasian	58.4%
Hispanic/Latino	14.4%
Native American	10.5%
African American/Black	7.2%
Asian/Pacific Islander	2.9%

HOUSEHOLD INCOME

$108,233

AVERAGE ANNUAL INCOME

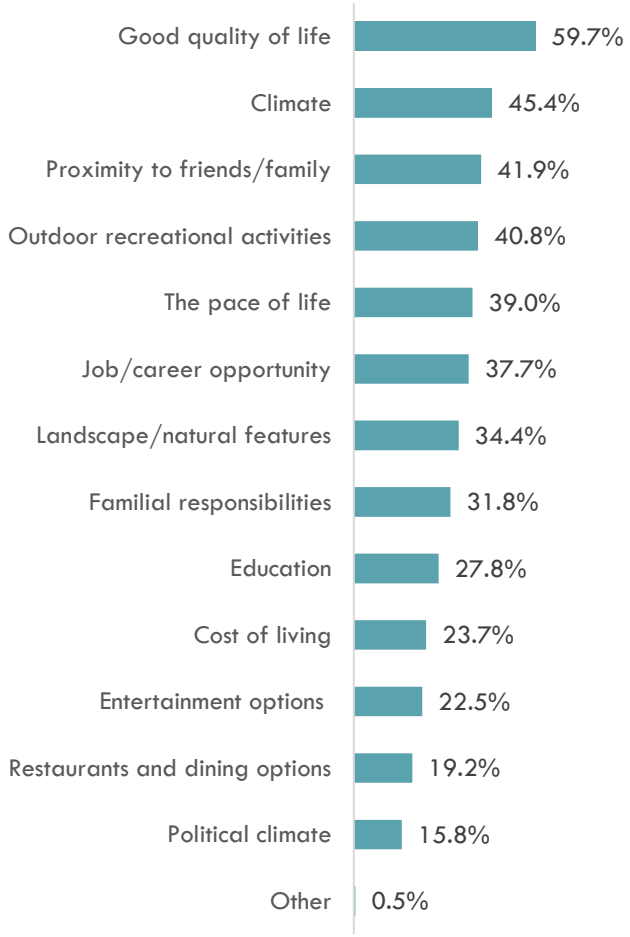
EMPLOYMENT

Employed Full-Time	78.8%
Employed Part-Time	10.4%
Retired	5.3%
Unemployed	5.5%

DEEP-ROOTED FAMILIES *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

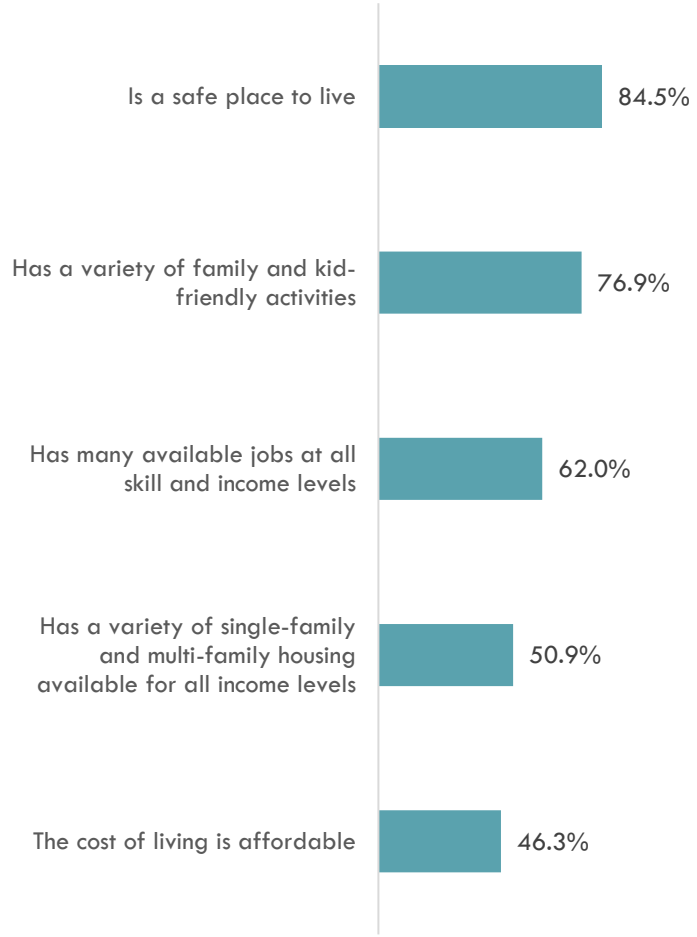


QUALITY OF LIFE

COMMUNITY DIRECTION

SLO CAL SENTIMENT

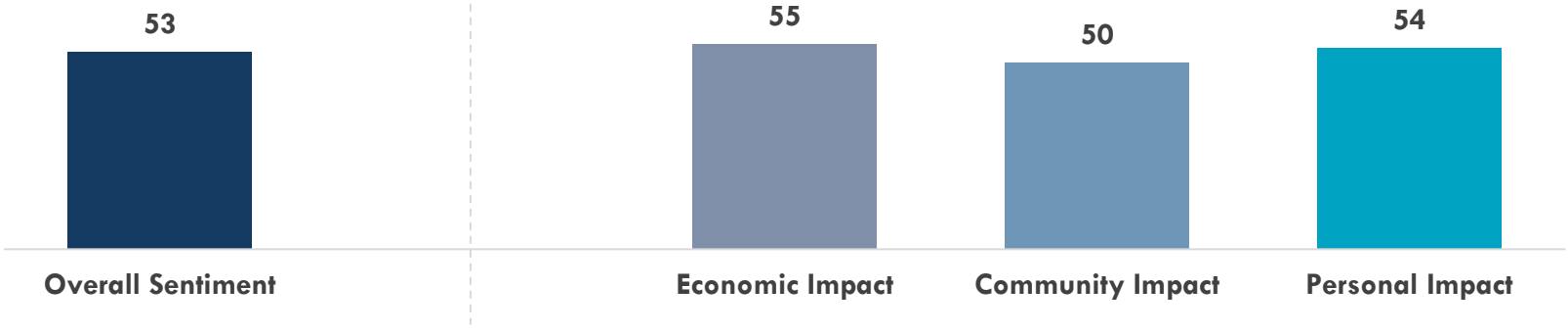
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



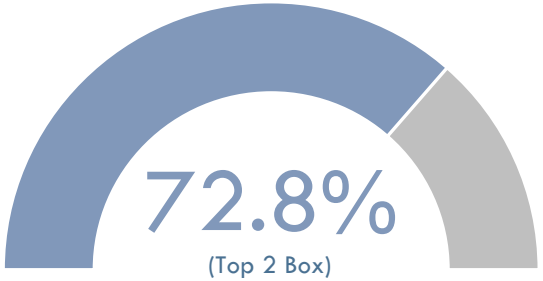
DEEP-ROOTED FAMILIES *SLO CAL Tourism Industry*

Destination Analysts

TOURISM INDUSTRY SENTIMENT INDEX

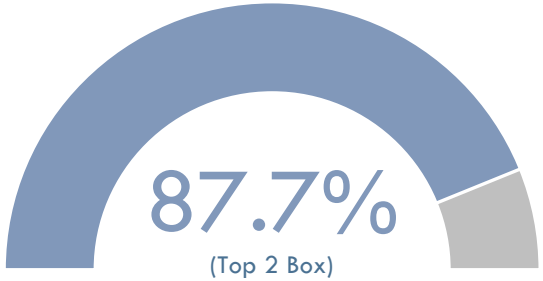


IMPACT ON QUALITY OF LIFE



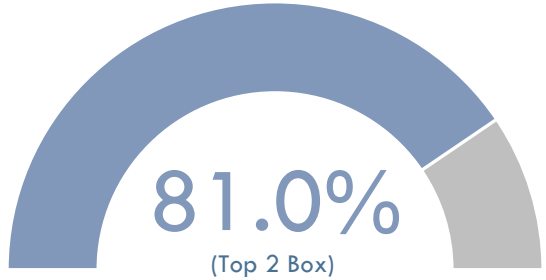
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

DEEP-ROOTED FAMILIES *Tourism Industry Employment*

Destination Analysts

Business Owners

19.4%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

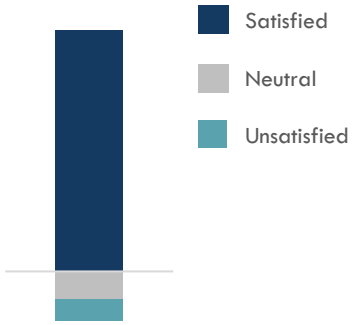
CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

82.6%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

58.5%

DMO AWARE

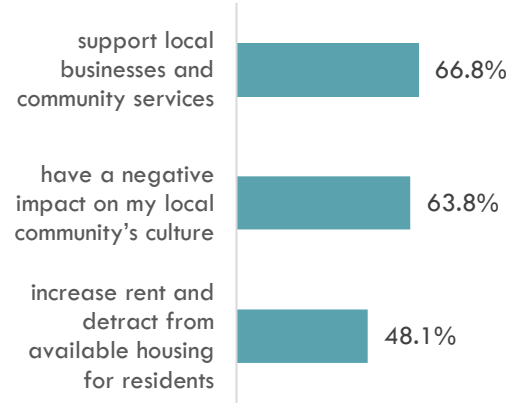
Previously Heard of Visit SLO CAL

58.3%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

74.0%

Stayed in Short-Term Vacation Rental Homes during Past Travel

CURRENT TOURISM EMPLOYEES

646 COMPLETED SURVEYS

CURRENT TOURISM EMPLOYEES *Who They Are*

Destination Analysts

GENDER

Female	43.9%
Male	55.1%
Other	0.9%

MARITAL STATUS

Married/Partnered	64.3%
Single	26.4%
Widowed/Divorced	6.7%
CHILDREN IN HOUSEHOLD	*64.5%*

AGE

Gen Z	14.3%
Millennial	56.0%
Gen X	24.4%
Boomer or older	5.3%
MEAN	*37.8*

ETHNICITY

White/Caucasian	56.0%
Hispanic/Latino	19.0%
African American/Black	10.1%
Asian/Pacific Islander	5.7%
Native American	4.5%

HOUSEHOLD INCOME

$94,577

AVERAGE ANNUAL INCOME

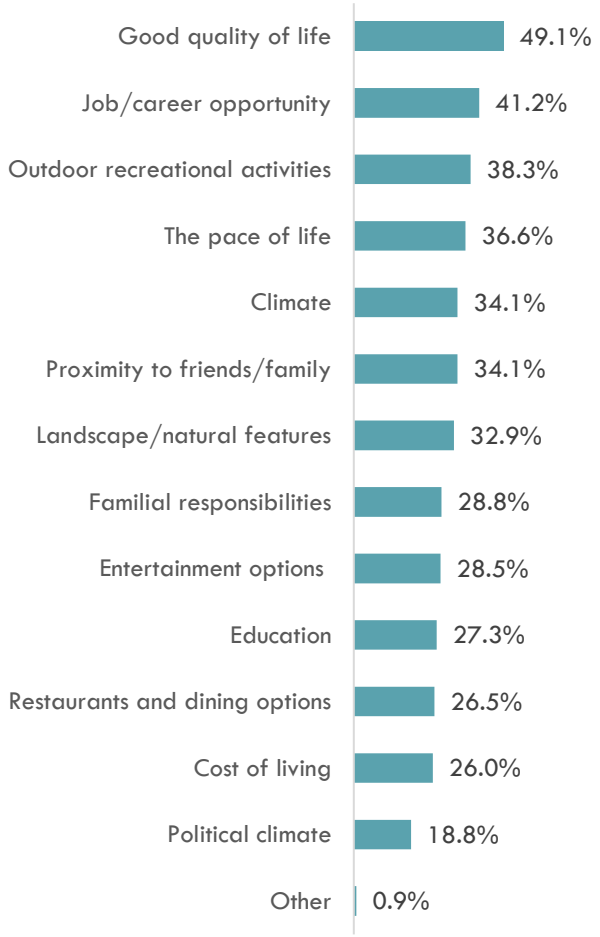
EMPLOYMENT

Employed Full-Time	78.7%
Employed Part-Time	18.5%
Retired	1.1%
Unemployed	1.7%

CURRENT TOURISM EMPLOYEES *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

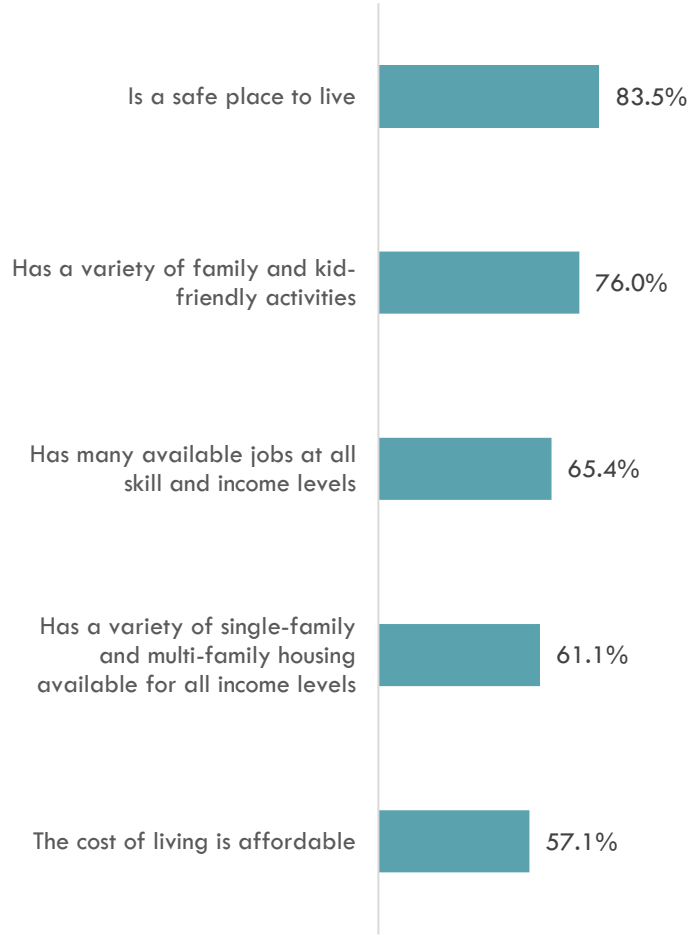


QUALITY OF LIFE

COMMUNITY DIRECTION

SLO CAL SENTIMENT

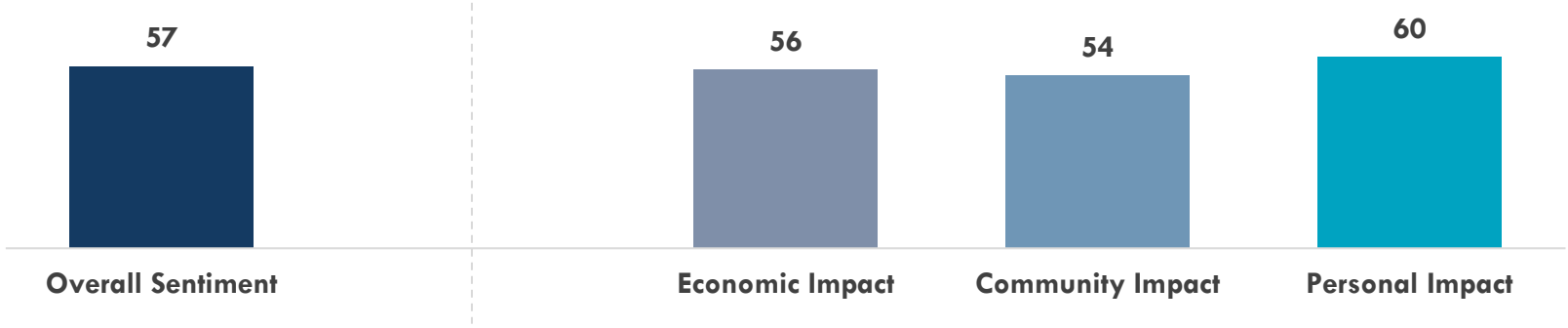
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



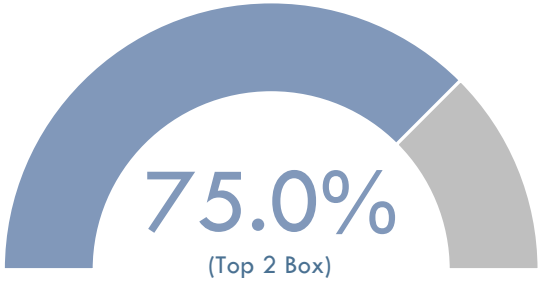
CURRENT TOURISM EMPLOYEES *SLO CAL Tourism Industry*

Destination Analysts

TOURISM INDUSTRY SENTIMENT INDEX

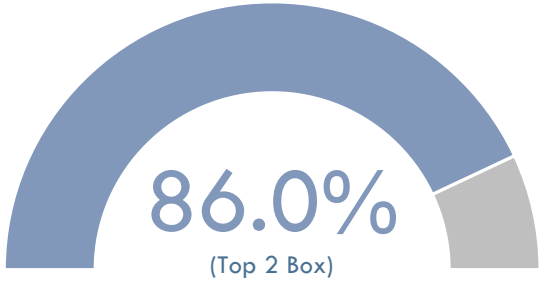


IMPACT ON QUALITY OF LIFE



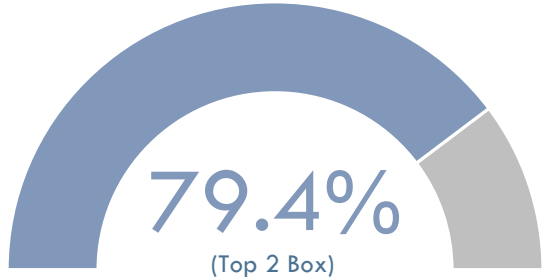
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

CURRENT TOURISM EMPLOYEES

Tourism Industry Employment

Destination Analysts

Business Owners

0.0%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

100%

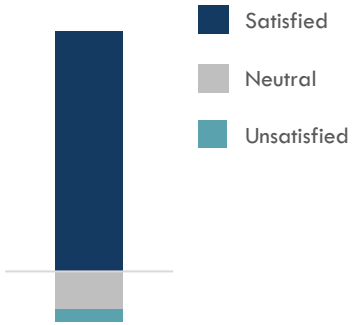
0%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

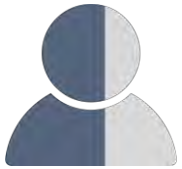
SLO CAL TOURISM EMPLOYMENT SATISFACTION

77.3%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS



62.5%

DMO AWARE

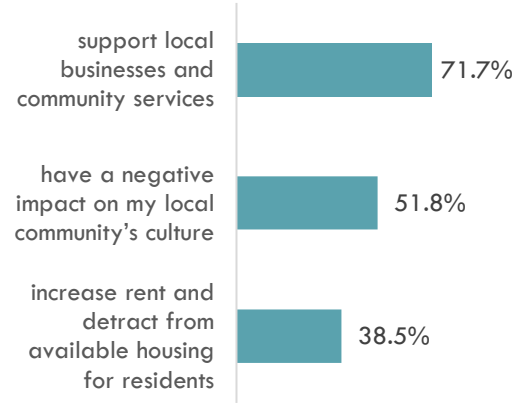
Previously Heard of Visit SLO CAL

37.0%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

75.8%

Stayed in Short-Term Vacation Rental Homes during Past Travel

PAST TOURISM EMPLOYEES

388 COMPLETED SURVEYS

PAST TOURISM EMPLOYEES *Who They Are*

Destination Analysts

GENDER

Female	46.5%
Male	51.5%
Other	2.0%

MARITAL STATUS

Married/Partnered	50.9%
Single	31.7%
Widowed/Divorced	13.4%
CHILDREN IN HOUSEHOLD	*38.8%*

AGE

Gen Z	12.7%
Millennial	42.5%
Gen X	15.0%
Boomer or older	29.8%
MEAN	*45.2*

ETHNICITY

White/Caucasian	65.2%
Hispanic/Latino	18.0%
African American/Black	5.2%
Asian/Pacific Islander	4.9%
Native American	1.3%

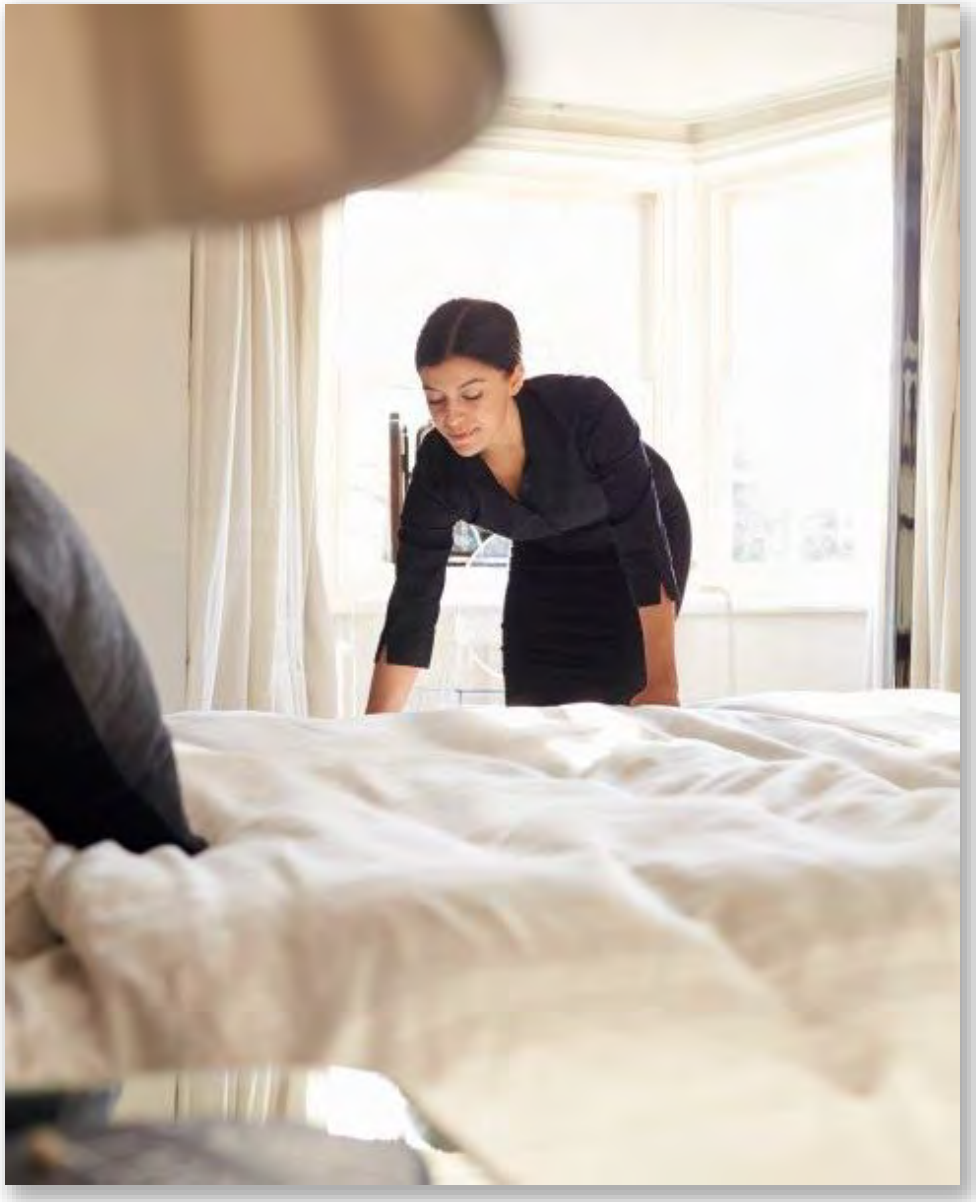
HOUSEHOLD INCOME

$75,410

AVERAGE ANNUAL INCOME

EMPLOYMENT

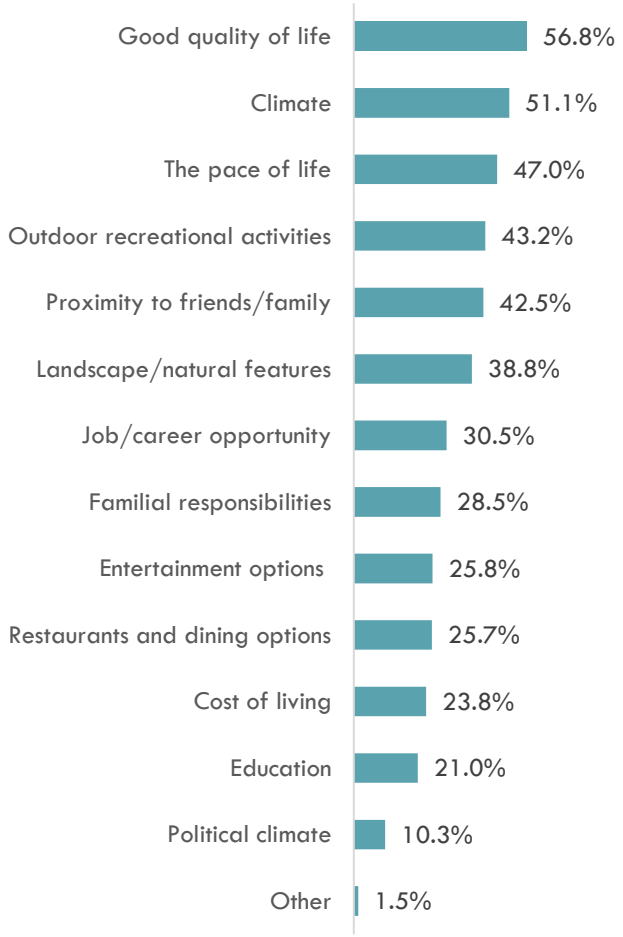
Employed Full-Time	49.2%
Employed Part-Time	17.4%
Retired	19.6%
Unemployed	13.8%



PAST TOURISM EMPLOYEES *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

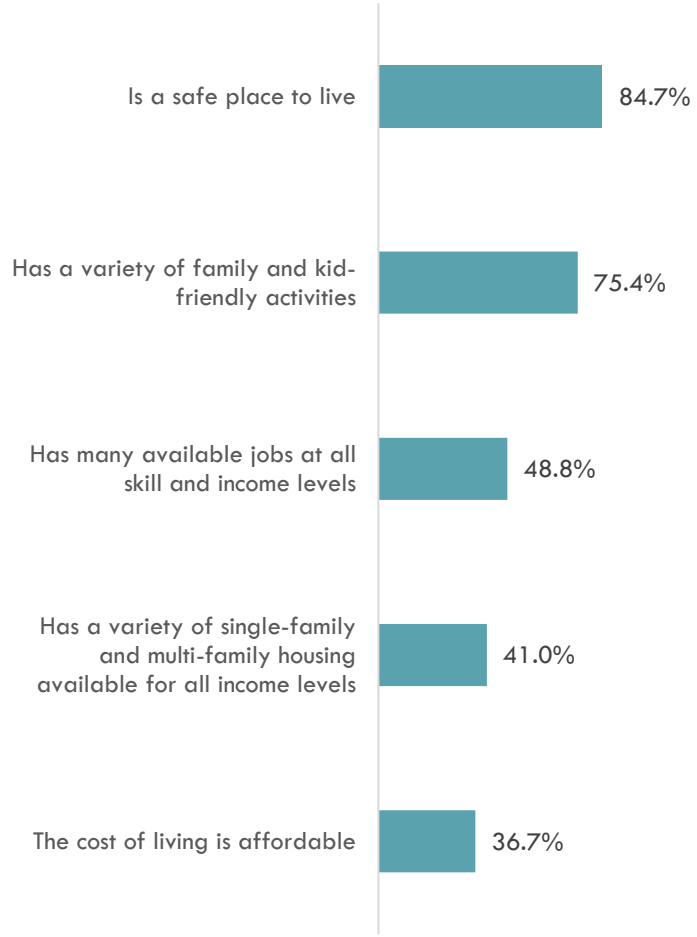


QUALITY OF LIFE

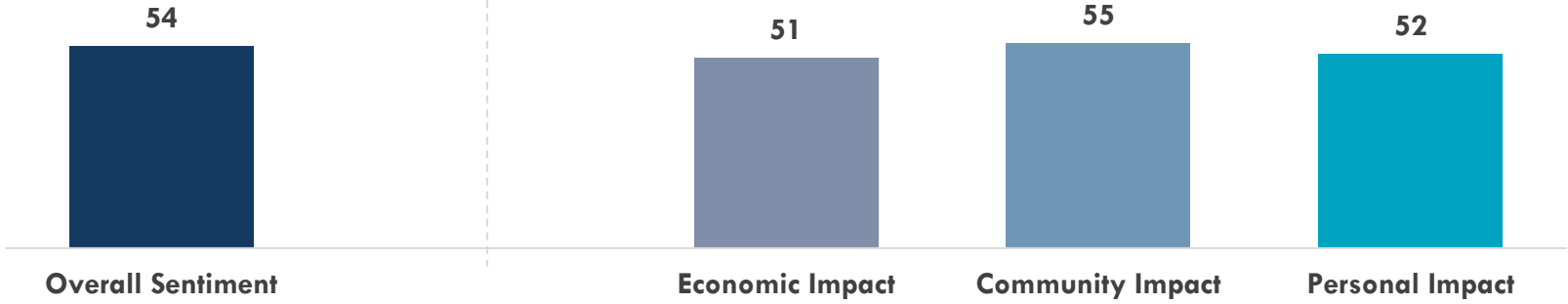
COMMUNITY DIRECTION

SLO CAL SENTIMENT

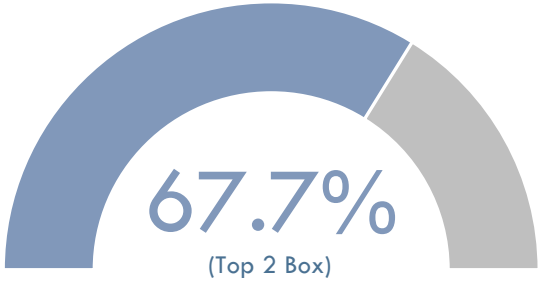
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

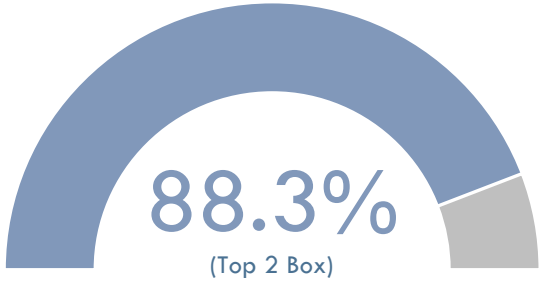


IMPACT ON QUALITY OF LIFE



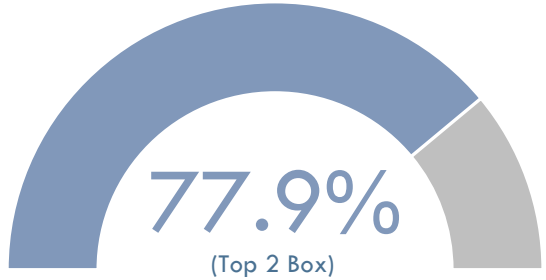
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

PAST TOURISM EMPLOYEES

Tourism Industry Employment

Destination Analysts

Business Owners

0.0%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

0%

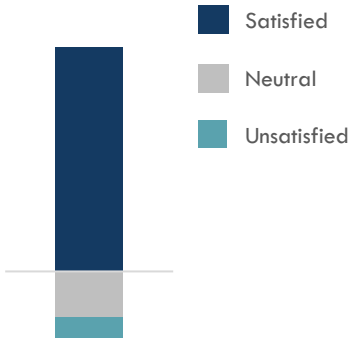
100%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

70.2%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

47.3%

DMO AWARE

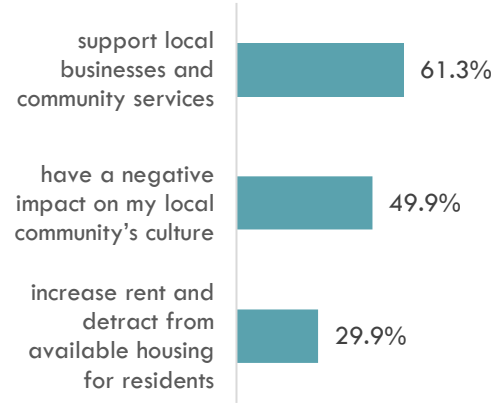
Previously Heard of Visit SLO CAL

7.9%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

63.7%

Stayed in Short-Term Vacation Rental Homes during Past Travel

DMO AWARE

1,246 COMPLETED SURVEYS

DMO AWARE *Who They Are*

Destination Analysts

GENDER

Female	48.8%
Male	50.2%
Other	1.0%

MARITAL STATUS

Married/Partnered	68.7%
Single	19.5%
Widowed/Divorced	9.5%
CHILDREN IN HOUSEHOLD	*52.6%*

AGE

Gen Z	7.7%
Millennial	45.1%
Gen X	22.5%
Boomer or older	24.7%
MEAN	*45.4*

ETHNICITY

White/Caucasian	67.7%
Hispanic/Latino	14.5%
African American/Black	6.6%
Asian/Pacific Islander	3.7%
Native American	3.6%

HOUSEHOLD INCOME

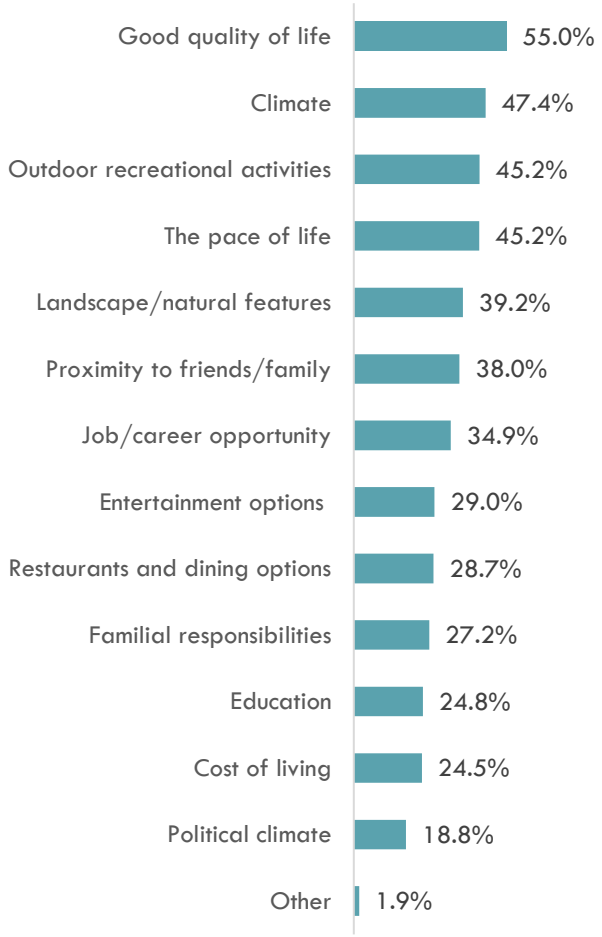
$95,998

AVERAGE ANNUAL INCOME

EMPLOYMENT

Employed Full-Time	64.5%
Employed Part-Time	12.9%
Retired	16.1%
Unemployed	6.5%

REASONS FOR STAYING IN SLO CAL

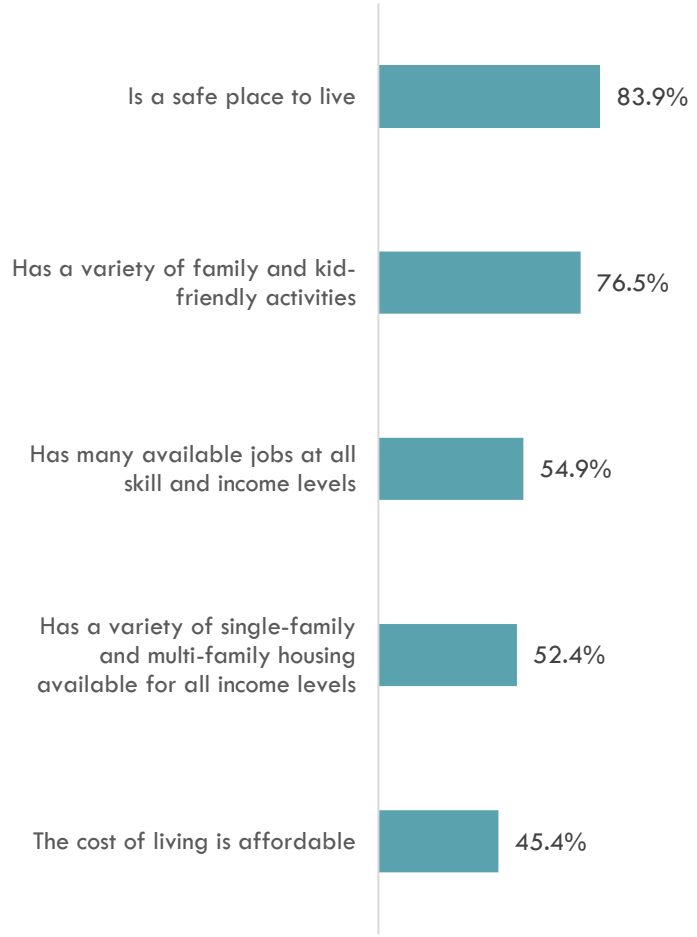


QUALITY OF LIFE

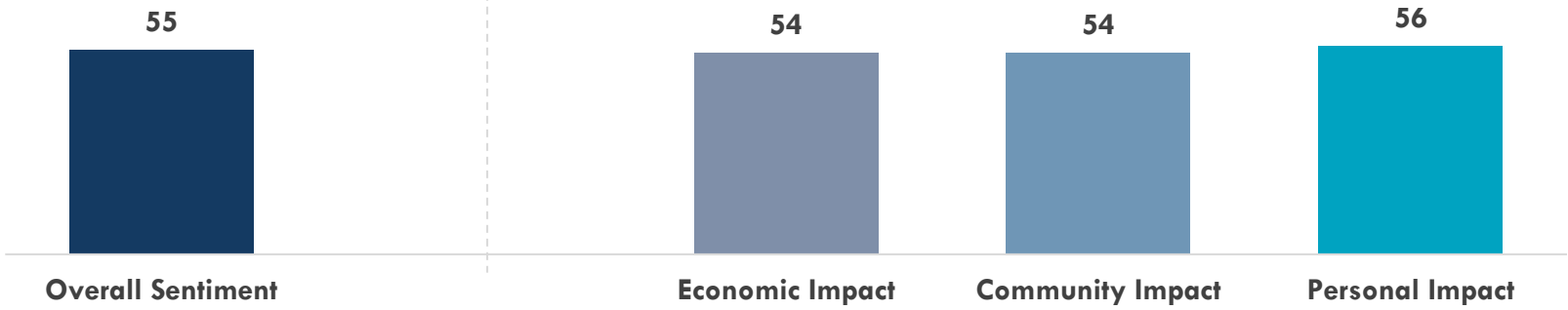
COMMUNITY DIRECTION

SLO CAL SENTIMENT

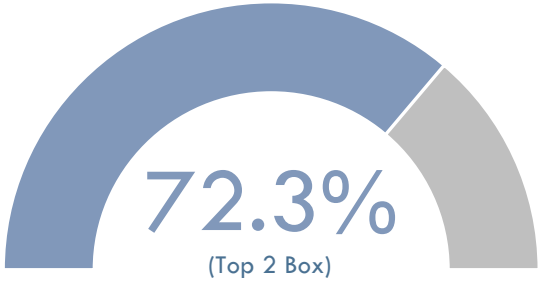
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



TOURISM INDUSTRY SENTIMENT INDEX

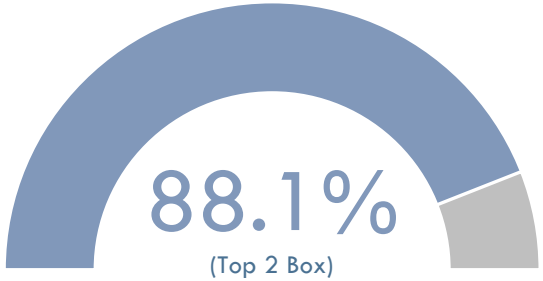


IMPACT ON QUALITY OF LIFE



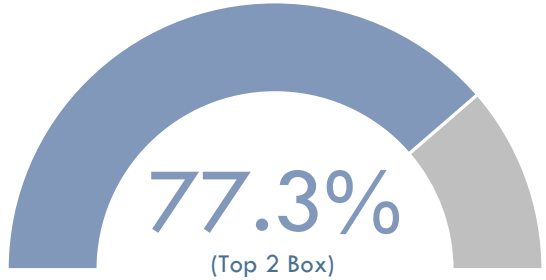
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

DMO AWARE *Tourism Industry Employment*

Destination Analysts

Business Owners

17.2%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

26%

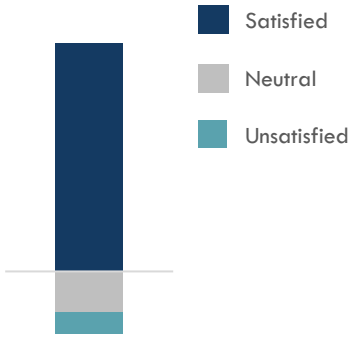
14%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

81.3%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

100.0%

DMO AWARE

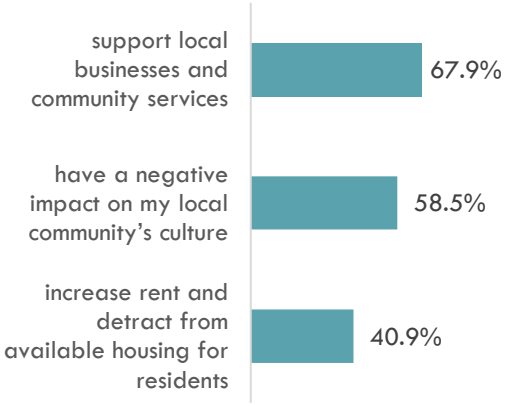
Previously Heard of Visit SLO CAL

47.1%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

72.0%

Stayed in Short-Term Vacation Rental Homes during Past Travel

DMO UNAWARE

958 COMPLETED SURVEYS

DMO UNAWARE *Who They Are*

Destination Analysts

GENDER

Female	44.4%
Male	55.0%
Other	0.5%

MARITAL STATUS

Married/Partnered	55.7%
Single	23.5%
Widowed/Divorced	14.7%
CHILDREN IN HOUSEHOLD	*29.0%*

AGE

Gen Z	7.5%
Millennial	26.7%
Gen X	20.1%
Boomer or older	45.7%
MEAN	*52.8*

ETHNICITY

White/Caucasian	62.2%
Hispanic/Latino	15.9%
African American/Black	7.5%
Asian/Pacific Islander	5.2%
Native American	1.4%

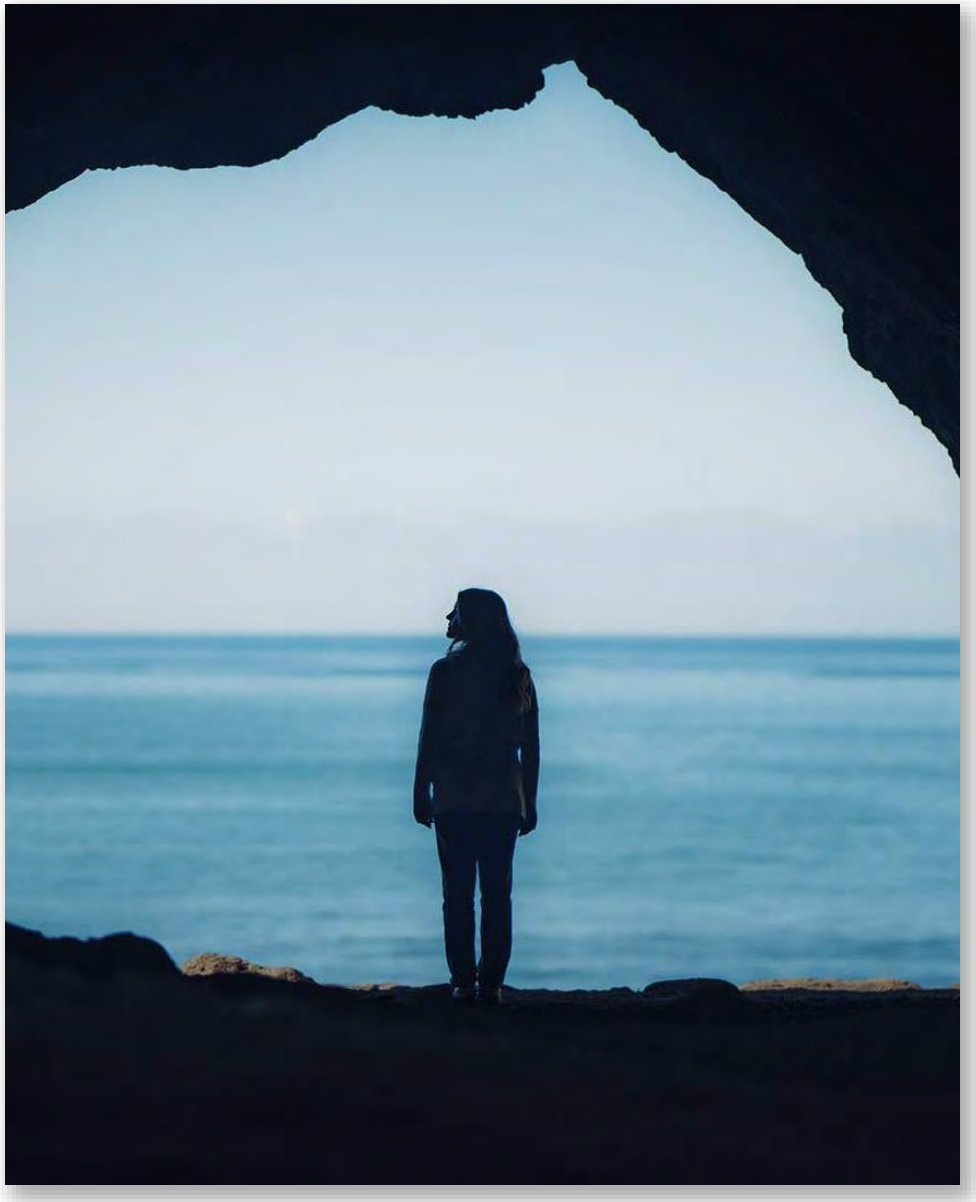
HOUSEHOLD INCOME

$82,592

AVERAGE ANNUAL INCOME

EMPLOYMENT

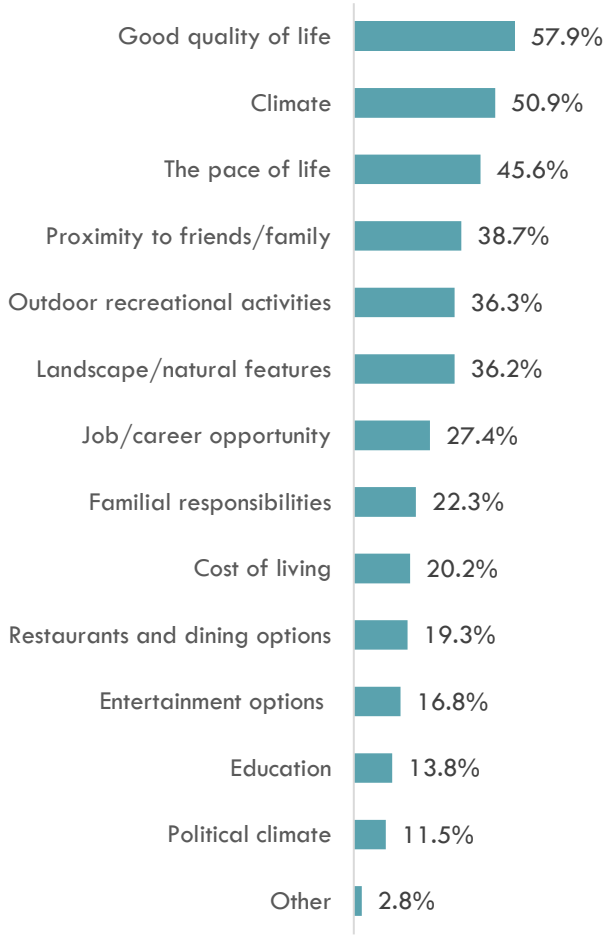
Employed Full-Time	44.7%
Employed Part-Time	15.0%
Retired	31.1%
Unemployed	9.1%



DMO UNAWARE *Profile*

Destination Analysts

REASONS FOR STAYING IN SLO CAL

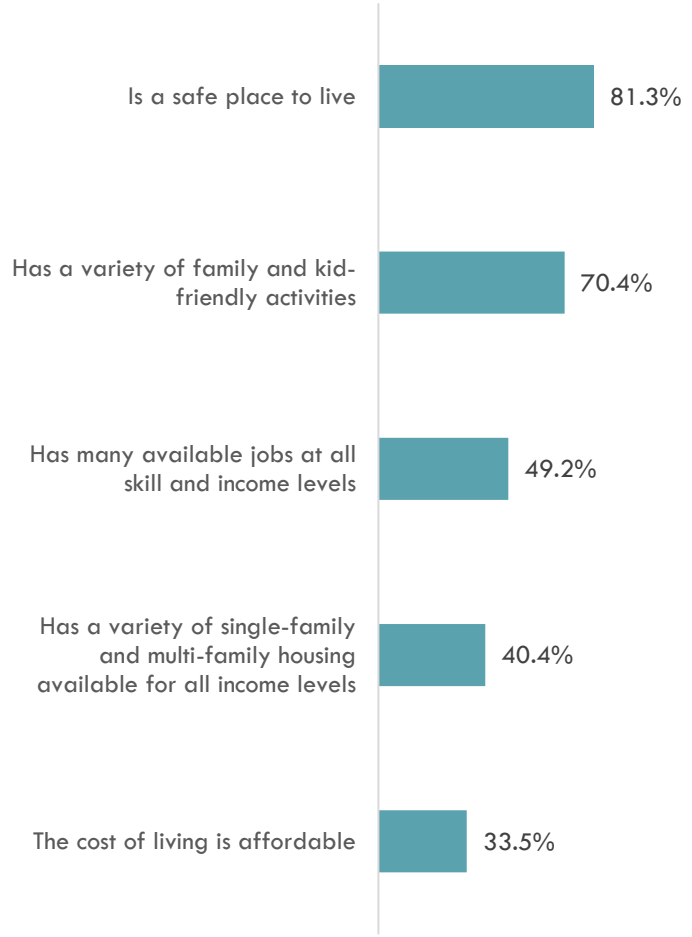


QUALITY OF LIFE

COMMUNITY DIRECTION

SLO CAL SENTIMENT

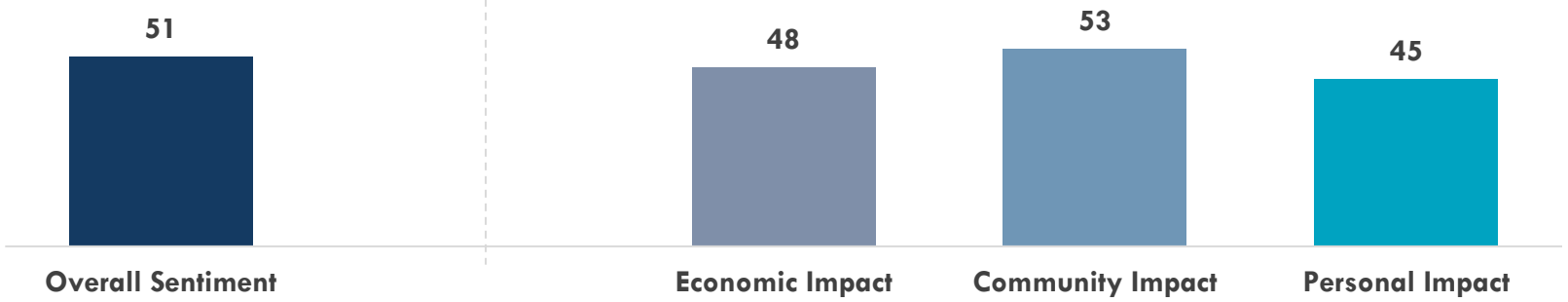
(Top 2 Box – Rating of "5 – Completely Agree" or "4" on a 5-Point Scale)



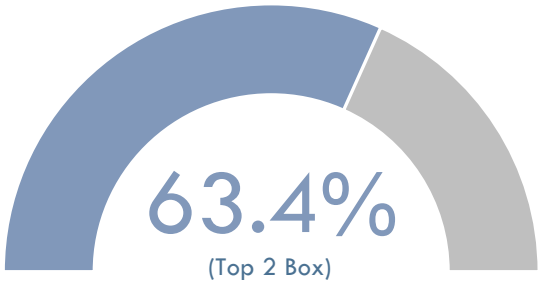
DMO UNAWARE *SLO CAL Tourism Industry*

Destination Analysts

TOURISM INDUSTRY SENTIMENT INDEX

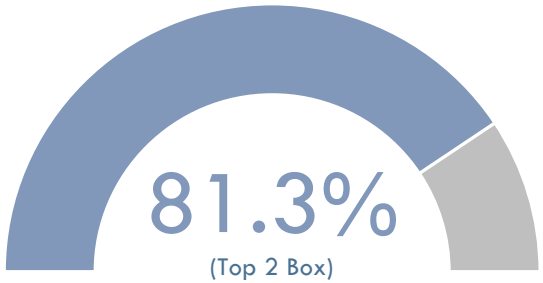


IMPACT ON QUALITY OF LIFE



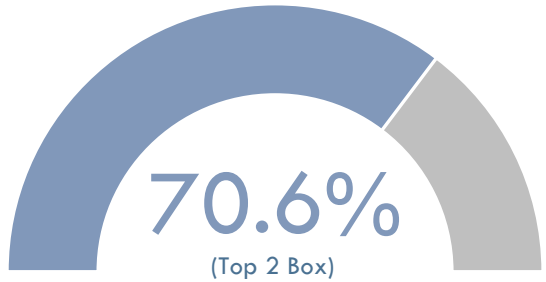
"I believe tourism in my community makes it a better place to live"

IMPACT ON SLO CAL'S ECONOMY



Tourism is "Very Important" or "Important" to the Vitality of SLO CAL's Economy

ECONOMIC IMPACT AWARNESS



"Knowing taxes generated by tourism can save each household $1,700 per year makes me appreciate SLO CAL tourism more"

DMO UNAWARE *Tourism Industry Employment*

Destination Analysts

Business Owners

4.8%

OWN A BUSINESS THAT SERVICES SLO CAL TOURISM INDUSTRY

Employees

CURRENT SLO CAL TOURISM INDUSTRY EMPLOYEE

14%

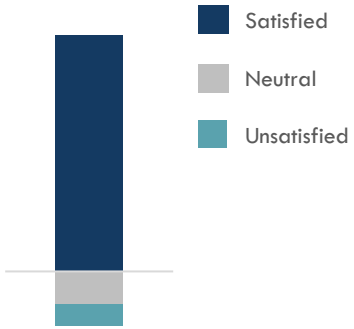
13%

FORMER SLO CAL TOURISM INDUSTRY EMPLOYEE

SLO CAL TOURISM EMPLOYMENT SATISFACTION

69.5%

SATISFIED WITH EXPERIENCE WORKING IN SLO CAL TOURISM INDUSTRY



DMO AWARENESS

0.0%

DMO AWARE

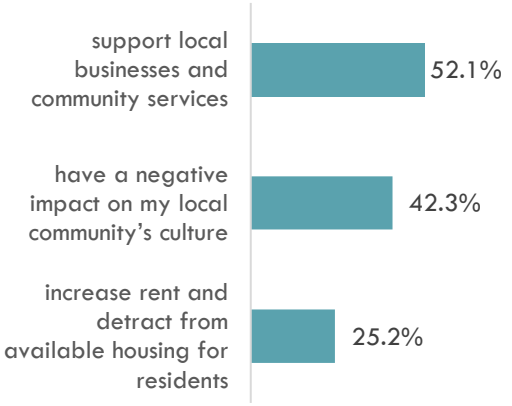
Previously Heard of Visit SLO CAL

0.0%

DMO FAMILIAR

"Extremely Familiar" or "Familiar" with Visit SLO CAL

SHORT TERM RENTALS...



SHORT TERM RENTAL USAGE

52.6%

Stayed in Short-Term Vacation Rental Homes during Past Travel