

SEPTEMBER 12, 2018

DESTINATION  
MANAGEMENT  
STRATEGY

COMMUNITY  
SURVEY

# VISIT SLO CAL

## OBJECTIVE

The objective of the Community Survey is to better understand the aspirations of the local community with respect to how San Luis Obispo County is perceived and positioned as a destination to live, work and play.

## METHODOLOGY

In consultation with Visit SLO CAL staff, Resonance developed an online survey to identify and gauge residents perceptions on a variety of key characteristics with respect to livability, culture, economy and sense of place. The survey was extensively promoted via email, television and radio public service announcements, and social media platforms to the databases of a variety of civic organizations as introduced by SLO CAL staff. The survey questions were designed to:

- Assess the quality and satisfaction with current services, accommodation and amenities throughout the County
- Identify hidden assets that may offer potential for increasing the resident quality-of-life and tourism growth
- Assess the relative attractiveness of different new amenities and improvements under consideration for San Luis Obispo County
- Inform project decisions for stakeholders and prioritize opportunities for the County
- Assess the impact of key issues (current) and opportunities (future) on residents' quality-of-life
- Engage residents in the development phase to accelerate the approval and design process for permanent changes in the future

## SUMMARY

The results from the SLO CAL Community Survey for the Destination Management Strategy are extremely robust, reflecting an excellent sample size (N=5,053), which includes respondents who Live Here (N=4,642), respondents who Work Here (N=3,456) and respondents who Study Here (N=725). 79 respondents did not identify themselves as Live Here, Work Here or Study Here, and as such were not allowed to submit answers to the survey. Highlights of the survey results follow:

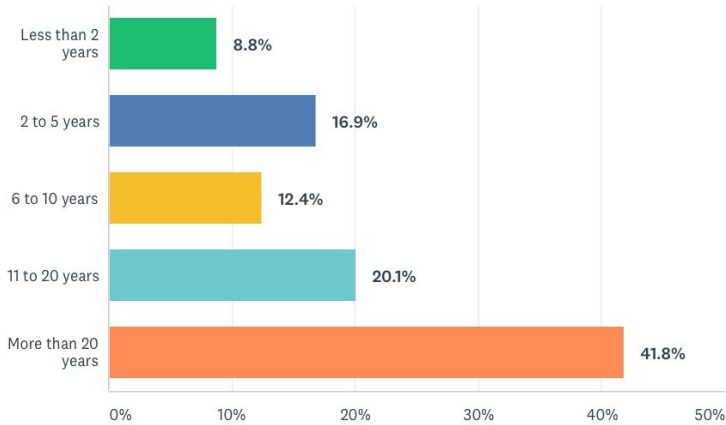
- The top six BEST things about San Luis Obispo County are related to its location, geography, climate and natural assets and beauty.
  - Climate, Weather

- Coastal Setting
  - Proximity to Beaches
  - Parks / Outdoor Space / Natural Scenery
  - Scenic Views
  - Location, Geography
- The six LEAST liked things about San Luis Obispo County are related to its economic and social situation.
  - Cost of Housing
  - Cost of Living
  - Homelessness
  - Housing Availability
  - It's not a Diverse Place
  - Employment Opportunities
- In regard to Experiences, respondents said that Golf, Equestrian Activities, Tours and Sports Teams are the least important, while Nature & Parks, Outdoor Activities, Hiking & Walks, Beaches, Recreational Activities, Restaurants, the Regional Airport and Farmers Markets are the most important.
- Also in regard to Experiences, respondents said that Sports Teams, Sports Events and Regional Transportation are the lowest Quality Experiences in SLO County, while Wineries, Farmers Markets, Beaches, Hiking & Walks, Outdoor Activities, and Nature & Parks are the highest Quality Experiences in SLO County.
- Respondents noted that Attractions (wineries, events, activities) rated highest in Customer Service, while Retail rated lowest in Customer Service.
- Respondents rated “Contributing to the Local Economy” as most important impact of tourism in SLO County, followed by “Creating Jobs for Residents” and “Funding for Public Services”. The least important impact of tourism in SLO County was “Attracting New Residents”.
- Respondents reported that, from a list of issues, Festivals and Events, followed by Private Events provided the most positive impact on SLO County quality of life for residents, while Homelessness and Economic Disparity had the most negative impact on SLO County quality of life for residents.
- Respondents reported that, from a list of future opportunities, the most positive impact on SLO County quality of life for residents is expected to be from “More Direct Flights”, followed by “More Marine Research and Aquatic Activities”. The future opportunity with the least positive impact on on SLO County quality of life for residents was “More High End Hotels and Resorts”.
- Finally, respondents reported that Homelessness in San Luis Obispo County is having a Somewhat Negative impact on the Visitor Experience.

## DEMOGRAPHICS - LIVE, WORK OR STUDY

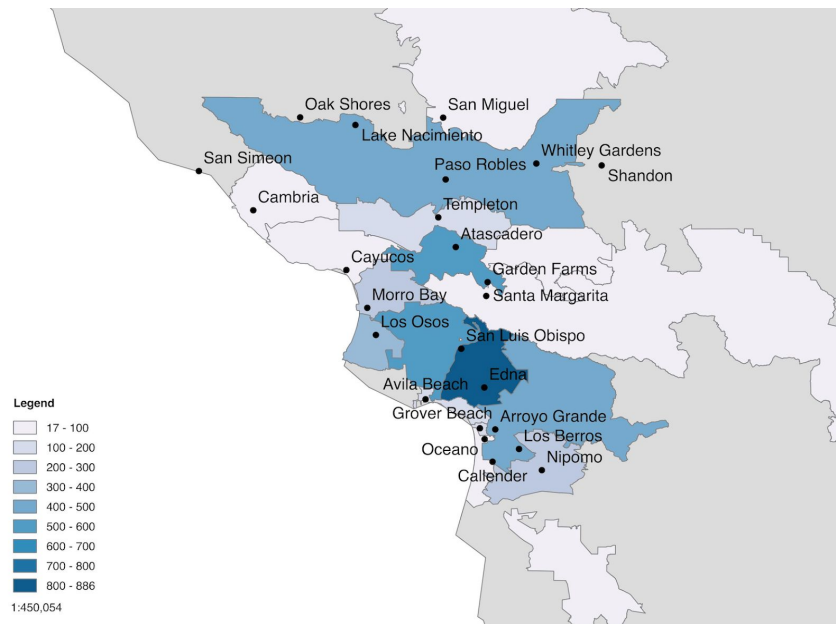
### Q2: How many years have you lived and/or worked in San Luis Obispo County? N=4,921

Nearly 42% of respondents have lived or worked in San Luis Obispo County for more than 20 years.



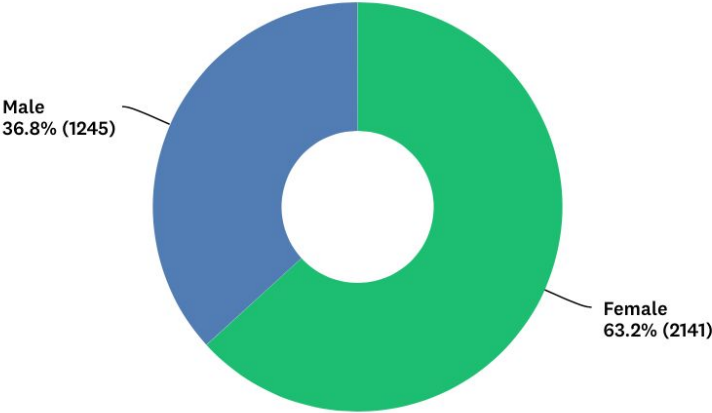
### Q3: What is your home zip / postal code? N=4,921

The following map illustrates the zip codes for survey respondents.



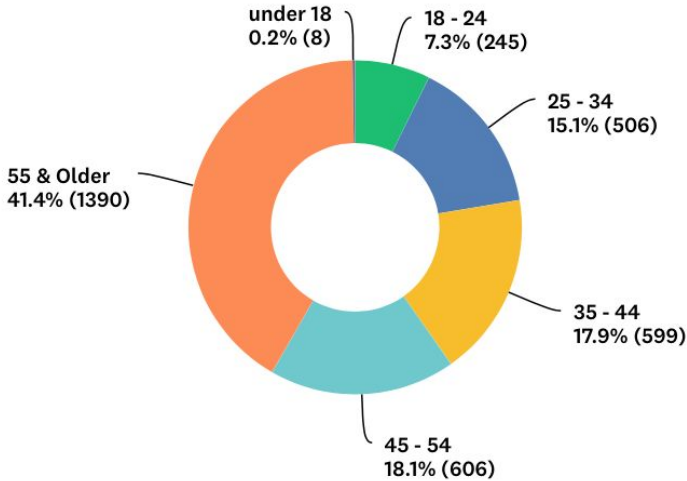
**Q39: What is your gender? N=3,540**

Nearly two thirds of respondents were female.



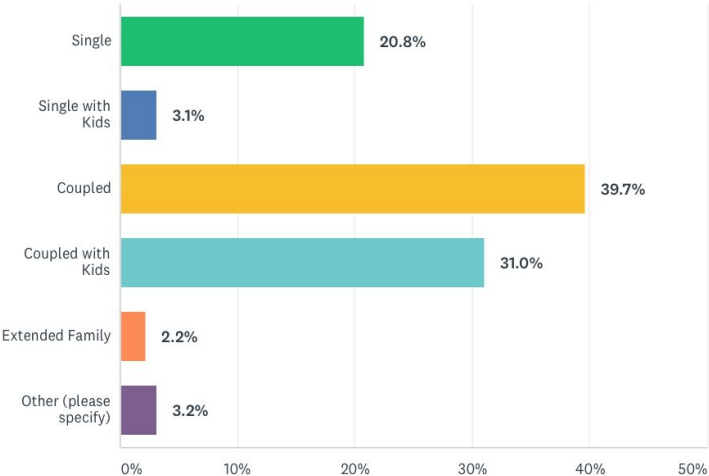
**Q40: What is your age? N=3,540**

There was a heavy concentration of respondents who are 55+ years old, but all adult age groups were well represented.



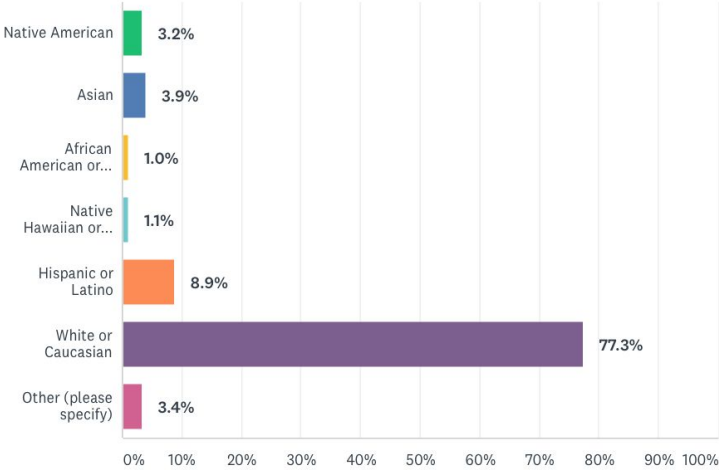
**Q41: Which of the following best describes your household? N=3,540**

Respondents are single, coupled, have kids and extended families.



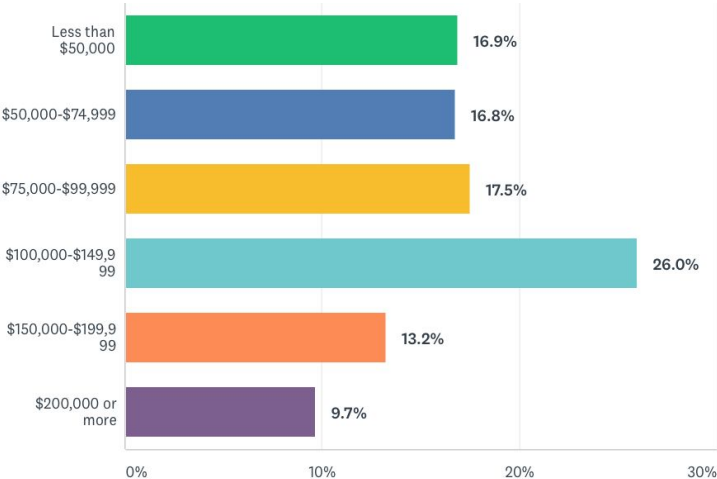
**Q42: To make sure we are representing the views of a broad mix of people, please indicate the ethnic group to which you belong. (Check all that apply)? N=3,540**

Respondents are mostly White or Caucasian (nearly 4 out of 5), with 8.9% Hispanic or Latino. Other ethnic groups were lightly represented.



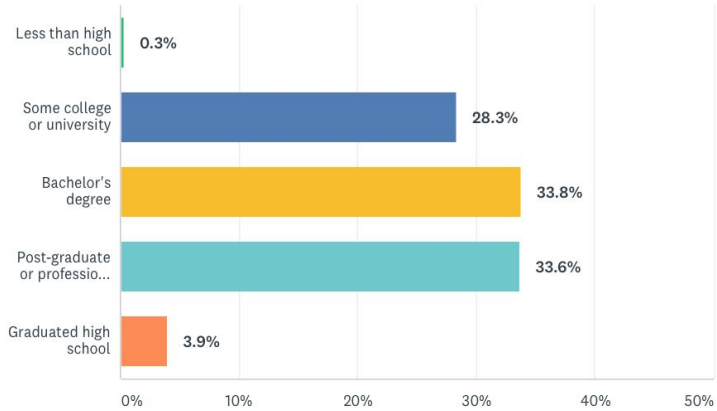
**Q43: What is your approximate annual household income? N=3,540**

Respondents are from all income groups were well represented.



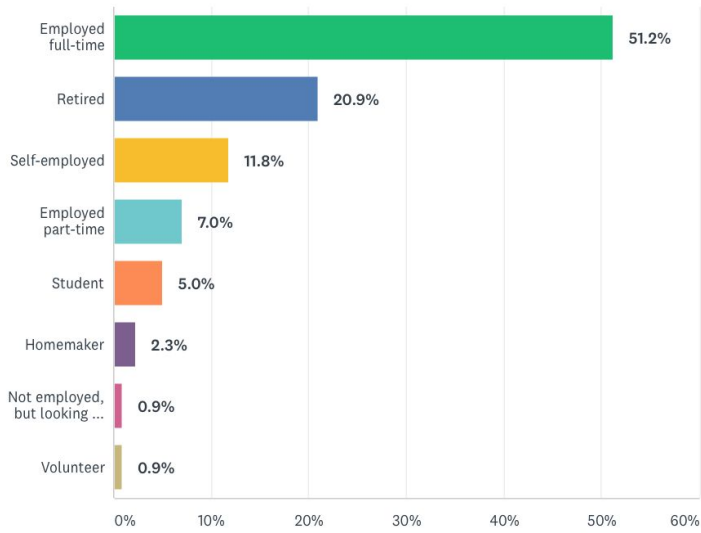
**Q44: What is the highest level of formal education you have completed? N=3,540**

Respondents tended to be well educated.



### Q45: Which of the following best describes your employment status? N=3,540

More than half of respondents are employed full-time, while another 11.8% are self-employed. 20.9% of respondents are retired and 5.0% are students.



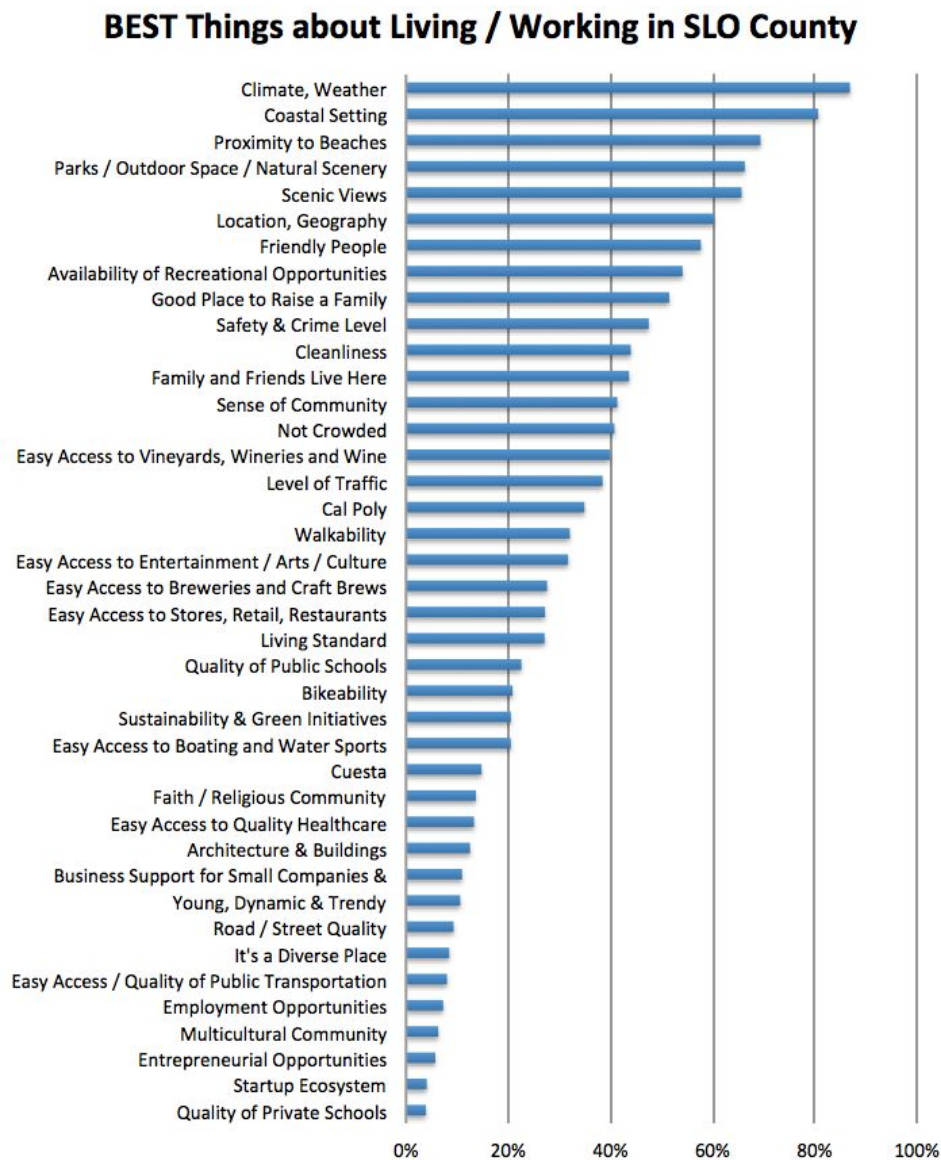
Please note, a table illustrating the demographics of this survey compared against SLO County population is included at the Appendix of this report.



## BEST THINGS AND LEAST THINGS

### Q4: What are the BEST things about living and/or working in San Luis Obispo County? Select all that apply.

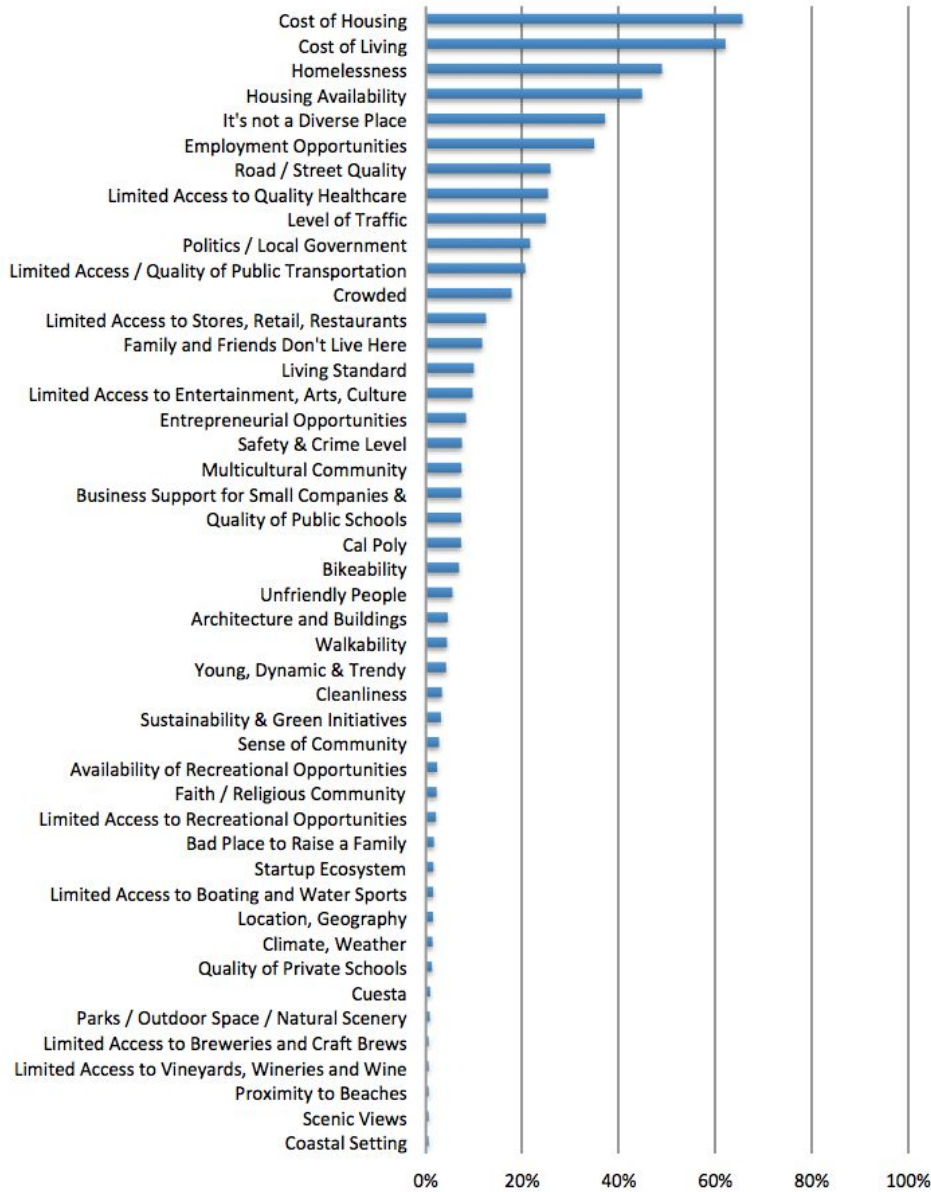
The top six BEST Things about Living / Working in San Luis Obispo County are related to its location, geography, climate and natural assets and beauty.



**Q5: What do you like LEAST about living and / or working in San Luis Obispo County? Select all that apply.**

The six LEAST liked things about Living / Working in San Luis Obispo County are related to its economic and social situation.

**LEAST Liked Things about Living / Working in SLO County**



## EXPERIENCES AND SERVICES - IMPORTANCE, QUALITY AND AVAILABILITY / SUPPLY

### **Q6: Which aspects of the SLO CAL "experience" were (are) important to you in deciding to live/work/study in the area?**

N=4,509

### **Q7: How would you rate the overall quality of the SLO CAL "experience"?**

N=4,182

### **Q9: How would you rate the overall availability of the SLO CAL "experience"?**

N=3,810

The results for Questions 6, 7 and 9 are best considered in one chart (see below). The horizontal axis illustrates results for Q6 (Importance) of the experience (left is low Importance, right is high Importance). The vertical axis illustrates results for Q7 (Quality) of the experience (bottom is low Quality, top is high Quality). The size of the bubbles represents the Availability/Supply of the experience (larger is better Availability/Supply).

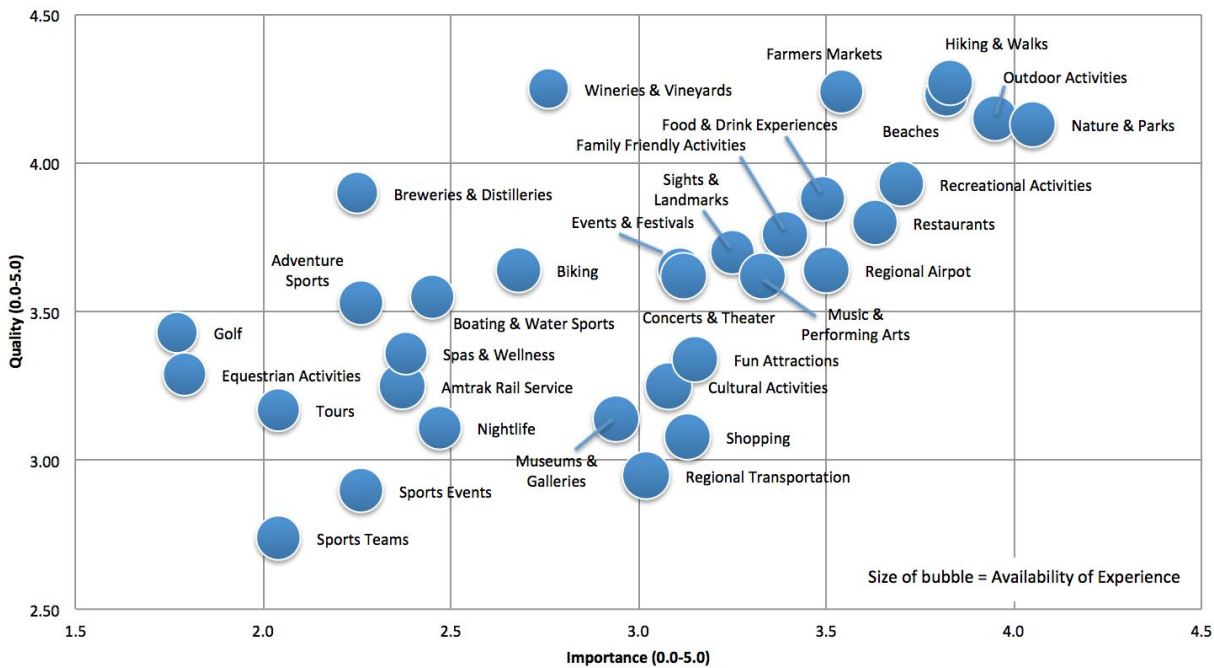
The first thing to notice is that there is very little discernible difference in the size of the bubbles, so respondents effectively said that there is little to no difference in Availability or Supply between these experiences.

Second, the Experiences on the left are less Important to respondents than Experiences on the right, so Golf, Equestrian Activities, Tours and Sports Teams are not particularly Important to SLO County residents. On the other hand, Nature & Parks, Outdoor Activities, Hiking & Walks, Beaches, Recreational Activities, Restaurants, the Regional Airport and Farmers Markets are particularly Important to SLO County residents.

Last, the Experiences on the bottom are lower Quality to respondents than Experiences on the top, so Sports Teams, Sports Events and Regional Transportation are rated as lower Quality Experiences to SLO County residents. On the other hand, Wineries, Farmers Markets, Beaches, Hiking & Walks, Outdoor Activities, and Nature & Parks are rated as higher Quality Experiences to SLO County residents.

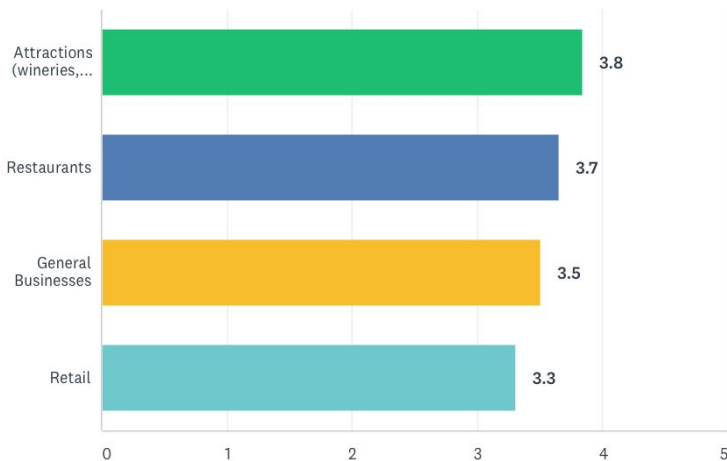
For any given Experience, the best placement on this chart is the upper right corner and the least favorable placement is the lower left corner.

### San Luis Obispo County Experiences



### Q8: How would you rate the general quality of Customer Service in San Luis Obispo County? (N=4,182)

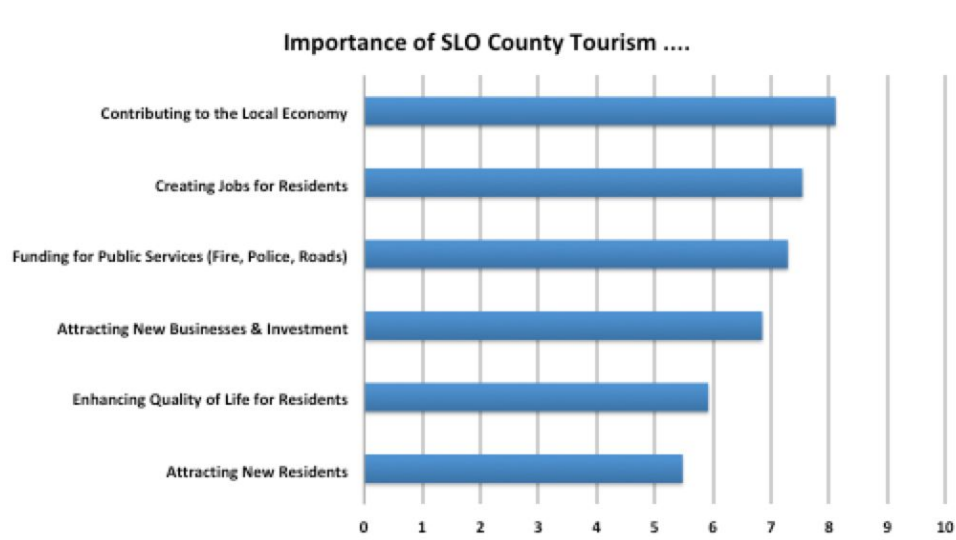
When asked about general quality of Customer Service, respondents noted that Attractions (wineries, events, activities) rated highest and Retail rated lowest.



## VALUE OF TOURISM

### Q10: On a scale of 1-10, how important do you believe tourism is to San Luis Obispo County in each of the following areas: (N=3,786)

When asked about the importance of SLO County Tourism, respondents rated “Contributing to the Local Economy” as most important, followed by “Creating Jobs for Residents” and “Funding for Public Services”. The least important choice for SLO County tourism was in “Attracting New Residents”.



## COMMUNITIES

**Q24: What impact do you think tourism has had on the quality of the following communities as a place to visit? (N=3,564)**

**Q25: What impact do you think tourism has had on the quality of the following communities as a place to live/work? (N=3,484)**

When asked about the impact of SLO County Tourism on individual communities as a place to visit and as a place to live/work, respondents said that tourism's impact was always more positive for the communities as a place to visit than as a place to live/work.

Paso Robles' impact of tourism on the community as a place to visit receives the highest score, followed by San Simeon, Cambria and Morro Bay.

Oceano's impact of tourism on the community as a place to visit receives the lowest score, followed by Creston, Shandon & Cholame, and Nipomo.

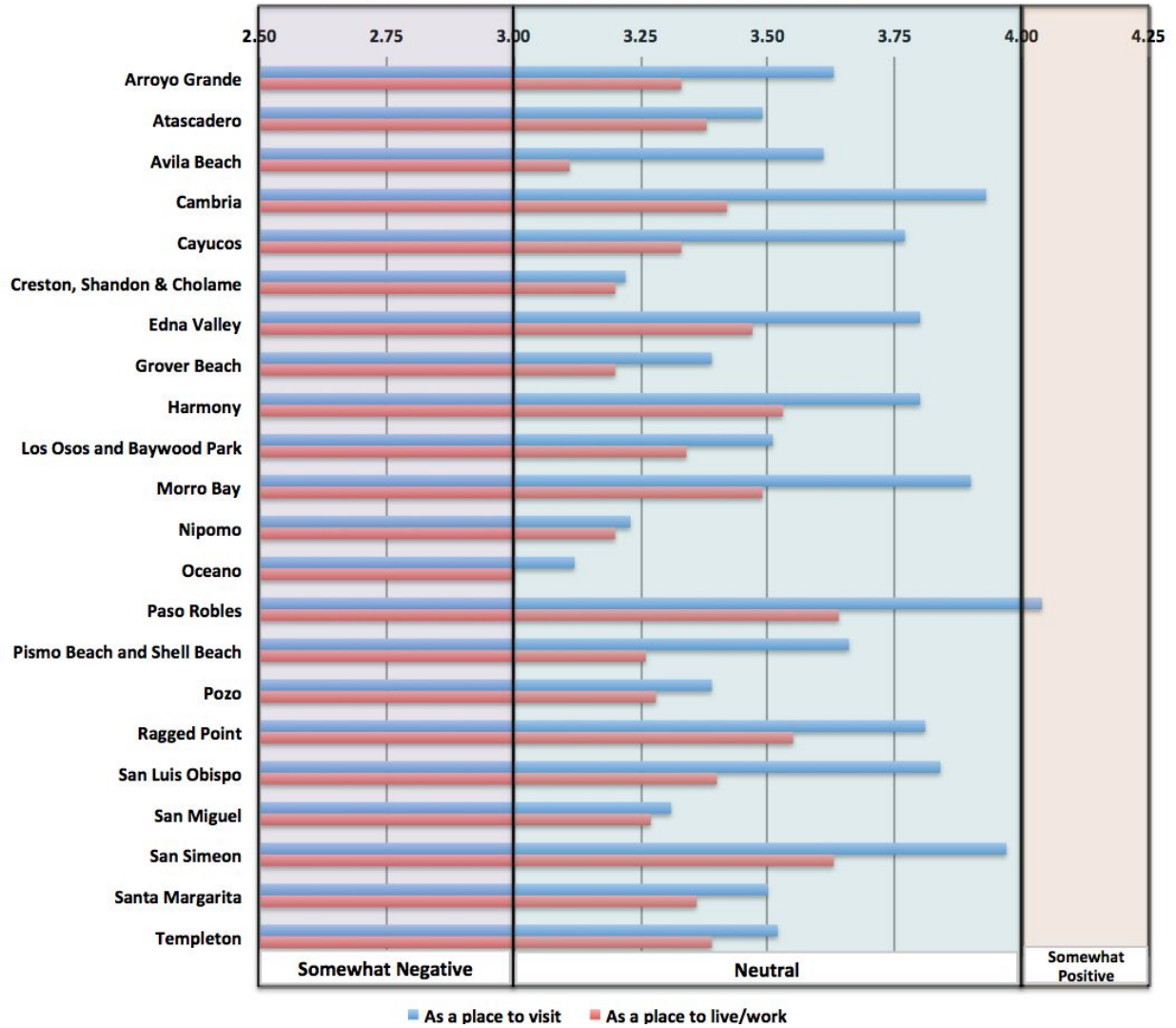
Paso Robles' impact of tourism on the community as a place to live/work receives the highest score, followed by San Simeon, Ragged Point and Harmony.

Oceano's impact of tourism on the community as a place to live/work receives the lowest score, followed by Avila Beach.

The difference (variance) in scores between tourism's impact on the community as a place to visit and as a place to live/work is largest for Cambria (0.51) and Avila Beach (0.50).

The difference (variance) in scores between tourism's impact on the community as a place to visit and as a place to live/work is smallest for Creston, Shandon & Cholame, (0.02), Nipomo (0.03) and San Miguel (0.04).

### Impact of Tourism on Communities...



## ISSUES

**Q11. What impact do you think professionally managed Vacation Rentals have had on the quality of life in the community where you live?**

N=3,732

**Q12. What impact do you think Vacation Rental shared economy services (Airbnb, VRBO, HomeAway) has had on the quality of life in the community where you live?**

N=3,735

**Q13. What impact do you think the legalization of cannabis is having on quality of life in the community where you live?**

N=3,726

**Q14. What impact do you think promoting cannabis tourism would have on quality of life in the community where you live?**

N=3,735

**Q16. What impact do you think private events (weddings, concerts, parties, etc.) have on quality of life in the region?**

N=3,726

**Q17. What impact do you think festivals and events (music, food, wine, arts & crafts) have on quality of life in the region?**

N=3,722

**Q18. What impact do you think homelessness in San Luis Obispo County is having on quality of life for local residents?**

N=3,712

**Q20. What impact do you think the current level of social and cultural diversity in San Luis Obispo County is having on quality of life for local residents?**

N=3,721

**Q22. What impact do you think economic disparity in San Luis Obispo County is having on quality of life for local residents?**

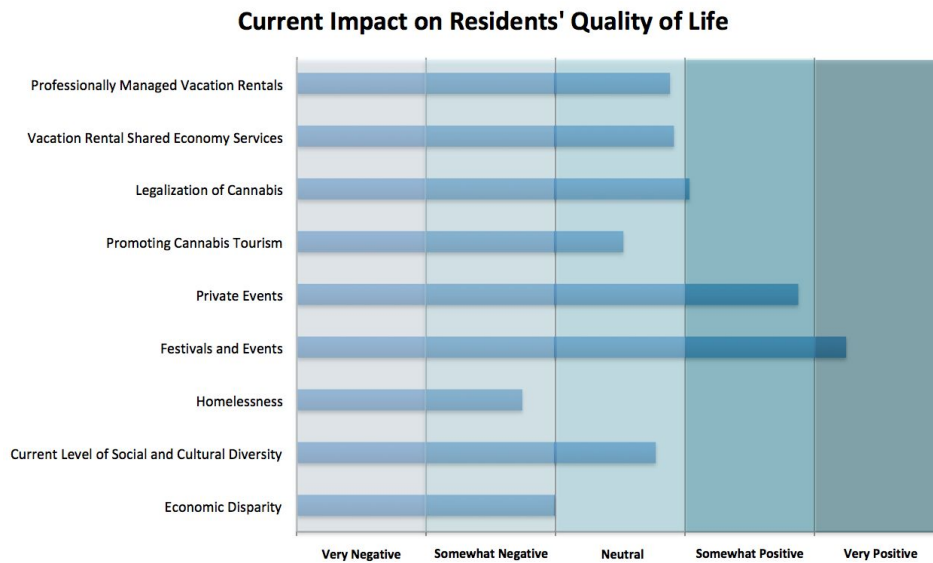
N=3,717



Each of the above questions asks about the current impact of an issue on the “quality of life for local residents”. The following chart illustrates how the responses compare.

The most positive impact is Festivals and Events, followed by Private Events. The most negative issues on the list were Homelessness and Economic Disparity.

Please note that the question regarding Private Events was asked, because stakeholders had suggested that Private Events were generally causing disruption (noise, traffic, etc) for residents. These results do not support that conclusion.



## ISSUES (OTHER)

**Q15. What impact do you think tourism has had on the quality of Oceano Dunes as a place to visit?**

N=3,717

**Q19. What impact do you think homelessness in San Luis Obispo County is having on the experience of visitors to the region?**

N=3,727

**Q21. What impact do you think the current level of social and cultural diversity in San Luis Obispo County is having on the experience of visitors to the region?**

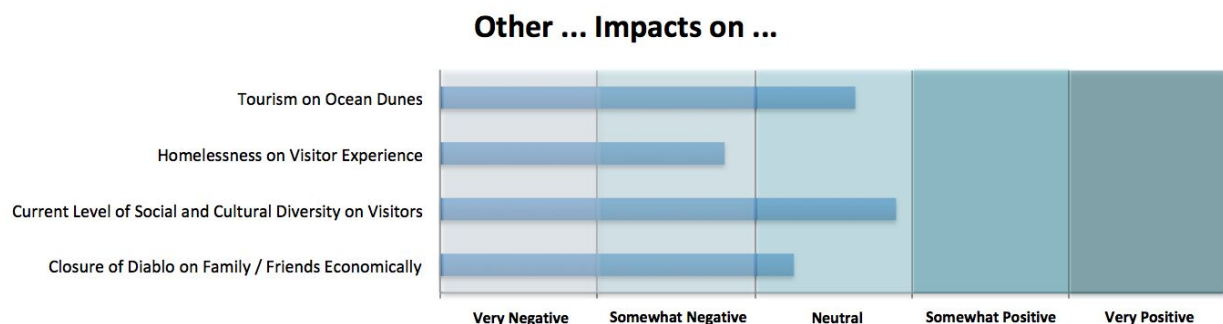
N=3,720

**Q23. What impact do you think the closure of the Diablo Canyon nuclear power plant will have on your family or friends economically?**

N=3,732

Each of the above questions asks about the impact of a specific issue on a specific place or group. The following chart illustrates how the responses compare.

Three of the four impacts are considered neutral by the respondents, while Homelessness in San Luis Obispo County is considered to have a Somewhat Negative impact on the Visitor Experience.



## OPPORTUNITIES

**Q26. What impact do you think the development of more direct flights from San Luis Obispo County Regional Airport to additional cities would have on quality of life in the region?**

N=3,541

**Q27. What impact do you think the development of a new San Luis Obispo County Convention / Conference Center would have on quality of life in the region?**

N=3,552

**Q28. What impact do you think the redevelopment of the Morro Bay Power Plant into a destination asset (hospitality, retail, park, recreation, visitor activity, etc) would have on quality of life in the region?**

N=3,555

**Q29. What impact do you think the development of more marine research and aquatic activities would have on quality of life in the region?**

N=3,555

**Q30. What impact do you think the redevelopment of the Diablo Canyon Power Plant (after decommissioning) into a destination asset (hospitality, retail, park, recreation, visitor activity, etc) would have on quality of life in the region?**

N=3,554

**Q31. What impact do you think the development of more workforce housing would have on quality of life in the region?**

N=3,548

**Q32. What impact do you think the development of more high end hotels and resorts in San Luis Obispo County would have on quality of life in the region?**

N=3,555

**Q33. What impact do you think the development of more high end restaurants in San Luis Obispo County would have on quality of life in the region?**

N=3,554

**Q34. What impact do you think the development of more music and performing art venues in San Luis Obispo County would have on quality of life in the region?**

N=3,544

**Q35. What impact do you think the development of more artisanal products (traditional, handmade, local) in San Luis Obispo County would have on quality of life in the region?**

N=3,549

**Q36. What impact would a more socially and culturally diverse San Luis Obispo County have on quality of life for local residents?**

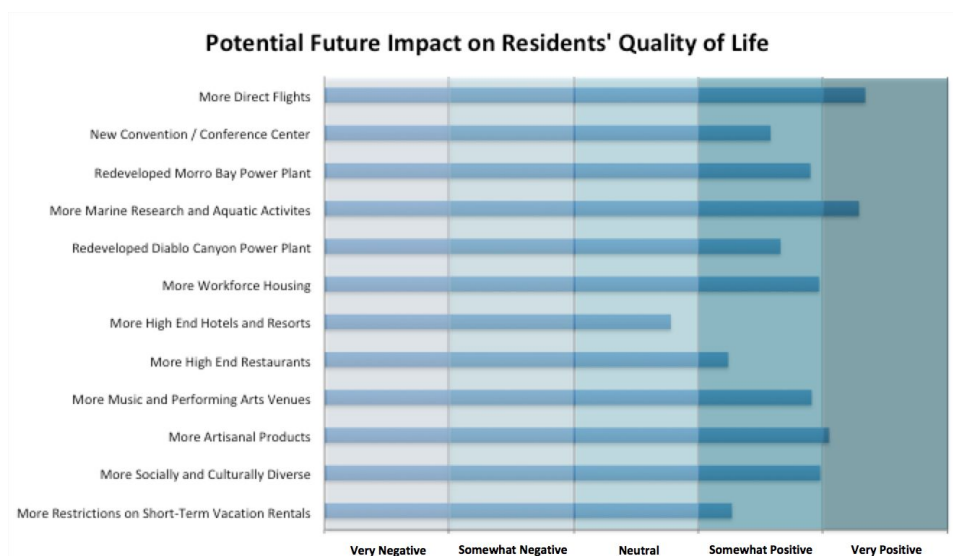
N=3,547

**Q37. What impact do you think more restrictions on the location and use of residences for short-term vacation rentals would have on quality of life in San Luis Obispo County?**

N=3,548

Each of the above questions asks about the potential future impact of an opportunity on the “quality of life for local residents”. The following chart illustrates how the responses compare.

The most positive potential future impact is More Direct Flights, followed by More Marine Research and Aquatic Activities. The least positive potential future impact was More High End Hotels and Resorts.



## APPENDIX

The following table illustrates SLO County population versus Survey Responses. The largest variance is in San Luis Obispo where students may not be included in the Census Population, but which are included in Survey Responses. Most other variances are generally small.

City/Community	Census Population	Survey Responses	Percent of County Population	Percent of the Survey Responses	Variance
Arroyo Grande, CA	17,252	455	6.1%	9.0%	2.9%
Atascadero, CA	28,310	510	10.1%	10.1%	0.0%
Avila Beach, CA	15,505	104	5.5%	2.1%	-3.5%
Cambria, CA	6,032	83	2.1%	1.6%	-0.5%
Cayucos, CA	2,592	44	0.9%	0.9%	-0.1%
Creston, CA	94	23	0.0%	0.5%	0.4%
Grover Beach, CA	13,156	162	4.7%	3.2%	-1.5%
Harmony, CA	18	1	0.0%	0.0%	0.0%
Los Osos, CA	14,276	326	5.1%	6.5%	1.4%
Morro Bay, CA	10,234	215	3.6%	4.3%	0.6%
Nipomo, CA	16,714	259	5.9%	5.1%	-0.8%
Oceano, CA	7,286	82	2.6%	1.6%	-1.0%
Paso Robles, CA	29,793	502	10.6%	9.9%	-0.7%
Pismo Beach, CA	7,655	134	2.7%	2.7%	-0.1%
San Luis Obispo, CA	45,119	1,533	16.0%	30.3%	14.3%
San Miguel, CA	2,336	233	0.8%	4.6%	3.8%
San Simeon, CA	462	5	0.2%	0.1%	-0.1%
Santa Margarita, CA	1,259	66	0.4%	1.3%	0.9%
Shandon, CA	1,295	9	0.5%	0.2%	-0.3%
Templeton, CA	7,674	144	2.7%	2.8%	0.1%

The following table shows the difference between the US Census and Survey Responses for Race and Sex.

	US Census	Survey
<b>Race and Hispanic Origin</b>		
White alone	68.8	77.3
Black or African American alone	2.0	1.0
American Indian and Alaska Native alone	1.4	3.2
Asian alone	4.0	3.9
Native Hawaiian and Other Pacific Islander alone	0.2	1.1
Hispanic or Latino	22.6	8.9
Other		3.4
<b>Total</b>	<b>99.0</b>	<b>98.8</b>
<b>Sex</b>		
Male	50.7	36.8
Female	49.3	63.2

 RESONANCE

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