

PROJECT 1: SHARE-OF-WALLET STUDY & DEMOGRAPHIC STUDY

Objective: Obtain a measure of the share of wallet spent on visiting San Luis Obispo County (SLOC) and competing areas, as well as a demographic and psychographic profile of current and potential visitors to SLOC and competing markets.

California Residents: 500

SLOC Visitors • SLOC Prospects • SLOC Fence Sitters

Non-California Residents: 500

SLOC Visitors • SLOC Prospects • SLOC Fence Sitters

Total Respondents: 1000

San Luis Obispo County (SLOC) Travel Spending

Visitors spent an average of \$2,100 during their last visit to SLOC

- 44% of their annual leisure travel spend was spent in SLOC
 - Accommodations (29%)
 - Food (21%)
 - Shopping (11%)
 - Entertainment (10%)
 - Activities (9%)
 - Wine (8%)
 - Arts/Cultural (6%)
 - Local transportation (6%)
 - Other (1%)
- **Spending is highest in the City of SLO (25% of SLOC spending). Also strong in Pismo Beach and Morro Bay.**
- Those living outside CA and those earning less than \$150k devote a larger portion of their total leisure travel spend to SLOC compared to others
- Those age 60+ spend less during their visit to SLOC than others
- Affinity for SLOC is very strong as is the intent to re-visit
 - 96% somewhat or very likely to return in the next 24 months

Perception of SLOC

- **SLOC is more apt to be seen as friendly, relaxed and not snobbish compared to competitive counties.**
- SLOC has an edge over most competitive counties in being perceived as casual, adventurous, down to earth, fun, genuine and unpretentious
- Top reason for not visiting SLOC:
 - Don't know enough about the area (46%)
 - Other destinations are closer (33%)
 - Other destinations are easier to get to (27%)

Prospective Visitors

- Affinity for SLOC is much lower and lagging compared to competing counties
- Awareness is highest for Santa Barbara and lowest for SLOC
- 65% are somewhat or very likely to visit in the next 24 months
- 42% are somewhat likely – higher than any other competitive county
- CA residents plan to visit in Spring/Summer, Non-CA residents plan to visit in October-December
 - 39% plan to travel with children

Expected visitation is strongest among:

- CA residents (44%), age 22-49 (44%) and especially those age 22-29 (52%)

SLOC Visitor Awareness

- Highway 1 (71%)
- City of SLO (66%)
- Pismo Beach/Shell Beach (57%)
- Morro Bay (53%)
- San Simeon/Cambria/Cayucos (53%)
- Paso Robles (49%)
- Arroyo Grande/Grover Beach/Oceano (43%)
- Atascadero/Templeton (32%)

SLOC Prospect Awareness

SLOC Prospects

- HWY 1 (84%)
- City of SLO (64%)
- Pismo Beach/Shell Beach (56%)
- San Simeon/Cambria/Cayucos (51%)
- Morro Bay (43%)
- Paso Robles (43%)
- Arroyo Grande/Grover Beach/Oceano (26%)
- Atascadero/Templeton (22%)

Current and Future Visitation

- Visitation is highest between June – August (31%)
- 50% arrive by automobile and 42% by airplane
- 55% traveled to SLOC with children
- Average length-of-stay was 3.6 nights
- 77% visitors stayed in a hotel/motel/resort
- 28% booked lodging 1-2 weeks ahead, 20% a few days and 9% in county
- 63% of visitors are age 22-39
- 75% are married and college graduates
- 60% are males 15% are Hispanic
- Average HHI is \$116,000
- More apt to live in LA, Fresno/Bakersfield, Portland, Phoenix, DC and FL
- Prospects are more likely to be female, a bit older and more apt to reside in Seattle, St. Louis and Riverside/San Bernardino