

SEPTEMBER 12, 2018

DESTINATION  
MANAGEMENT  
STRATEGY

DESTINATION  
SURVEY

# VISIT SLO CAL



## OBJECTIVE

The objective of the Destination Survey is to better understand who the current San Luis Obispo County Visitor (and Resident) is, how they compare to U.S. travelers in general and what types of travelers might be attracted to the destination in the future. The survey is intended to:

- Assess the quality and satisfaction with current destination services, accommodations and amenities; and
- Conduct a segmentation analysis of the survey respondents to better understand the San Luis Obispo County guest and how they differ from U.S. travelers in general.

## SUMMARY

The results of from the SLO CAL Visitor Survey for the Destination Management Strategy are robust, reflecting an excellent sample size (N=2,080), which includes Previous Visitors (N=1,064) and Residents [Who Live or Work Here] (N=650). 224 respondents did not identify themselves as Previous Visitor or Resident. Highlights of the survey follow:

## DEMOGRAPHICS

- The zip code results suggest that the vast majority of respondents live within a 6-hours drive of SLO County.
- The largest visitor markets of respondents outside of a 6-hours drive included: Seattle, Phoenix, Tucson, Salt Lake, Denver, Portland, Dallas/Fort Worth, Washington DC and Chicago.
- Based on the demographics of survey respondents, there is an open question about the actual age of visitors to SLO County, as the sample collected by this survey was older than the previous Share-of-Wallet Study. Please note that because of this open question, additional analysis of the results have been added to a number of the questions to illustrate the results by age group. This open question, would also suggest that Visit SLO CAL needs to conduct a visitor traffic profile study to determine the demographics of its actual visitors.
- Previous Visitor respondents tended to be slightly more ethnically diverse than Resident respondents.
- For those respondents that indicated their income, Previous Visitors tended to be slightly more affluent than Residents.
- Previous Visitors to SLO CAL tended to visit as a married couple, unmarried couple or family. Only 15.2% of Previous Visitors came solo.

## MARKET SEGMENTATION

- Based on the Resonance Consultancy proprietary Market Segmentation Analysis, Previous Visitors to SLO CAL are more likely than Residents to be Active Adventurers, Family-Oriented Frugals and All-in Enthusiasts, and less likely than Residents to be Infrequent Convenience Travelers and Sophisticated Explorers. Definitions of the Market Segments are included in the detailed results.

## THEIR VISITS

- Respondents reported that April, May, and June are the most recent visit to SLO CAL by Previous Visitors. The timing of the study, which occurred during June may have impacted these results.
- Nearly two thirds of visitors came to SLO CAL for a “getaway trip” (1 night or couple/few nights) suggesting that SLO CAL is a short visit destination.
- Visits to SLO CAL tends to be “Just for Fun”, for a Getaway / Short Break, for Rest and Relaxation and for Holiday or Vacation, with a little Visiting Family and Friends thrown in.
- Business Reasons, Conference and Convention, Education and Training were particularly low on the list of reasons Previous Visitors came to SLO CAL.
- More than 4 out of 5 Previous Visitors came to SLO CAL by Auto/Motorcycle.
- For the small number of respondents that arrived by Air, they tended to stay longer and came alone or as a married couple.
- More than half of Previous Visitors stayed in a Hotel / Motel or Resort, while slightly less than 10% rented a condo or vacation home.
- The vast majority of Previous Visitors have been to SLO County before (92.5%).

## THEIR PERCEPTIONS

- Previous Visitors said that when they think of SLO CAL it’s about Beautiful, Wine, Beaches, Relaxation, Food, Fun, Ocean and Weather. Also polling strong were Friendly and Wineries.
- Residents said that when they think of SLO CAL it’s about Beautiful, Beaches, Weather, Friendly, Wine and Outdoors. Also polling strong were Hiking, Home, Cal Poly, People, Food, Relaxed, and Fun.
- Previous Visitors told us that they didn’t like the increased Traffic, limited Parking, increased Prices / higher Cost / more Expensive, rude People, trash on Beaches, reduced ATV access to the Dunes and Downtown parking and homeless people.

- Previous Visitors told us that they wanted Better Infrastructure, Roads and more Parking; less traffic; cheaper Hotels; cleaner Beaches and Downtown. They also want more Dune access.
- Previous Visitors told us that to come back more often, SLO CAL should Offer Deals, Discounts and Better Prices, which is what visitors say to all destinations. They also said more events, festivals and cheaper hotels. They also want more Dune access.
- Previous Visitors told us that in order to extend their stay by a day or more, SLO CAL should Lower Hotel Rates, offer Deals / Discounts / Coupons, host more Events / Festivals and make SLO CAL more Affordable.

## WHERE THEY WENT

- Previous Visitors most often visited San Luis Obispo City, Morro Bay, Pismo and Shell Beaches, Paso Robles and Cambria.
- Previous Visitors most liked Cambria and San Luis Obispo City; followed by Ragged Point, San Simeon and Morro Bay; Avila Beach, Paso Robles, Cayucos, Pismo and Shell Beaches.

## THEIR ACTIVITIES / EXPERIENCES

- For Previous Visitors the SLO CAL experiences that are most Important and highest Quality to them included: Food & Drink Experiences (i.e. Wine Tasting), Nature & Parks, Outdoor Activities, Restaurants, Sights & Landmarks and Wine Country. The experiences that are least Important and lowest Quality to them included: Sport Venues and Sports Teams.
- For Residents the SLO CAL experiences most Important and highest Quality experiences to them included: Events & Festivals, Food & Drink Experiences, Nature & Parks, Outdoor Activities, Restaurants, Sights & Landmarks and Wine Country. The experiences that are least Important and lowest Quality to them included: Sport Venues and Sports Teams.

### Sports Teams

- For Sports Teams, Residents give more Importance to SLO County Sports Teams than Previous Visitors.

### Sports Venues

- Sport Venues are also more important for Residents than for Previous Visitors.

## Colleges and Universities

- Residents rate the Importance of SLO County Colleges and Universities higher than Previous Visitors.

## Bed & Breakfasts

- Surprisingly, Residents rated SLO County Bed & Breakfasts more Important than Previous Visitors.

## RV Parks and Campgrounds

- Under 35 year old Previous Visitors rate SLO County RV Parks and Campgrounds highest for Importance and Quality. The most affluent Previous Visitors rate SLO County RV Parks and Campgrounds highest for Quality.

## Spas and Wellness

- Spas and Wellness is more important for Residents than Previous Visitors.

## Dog Friendly

- Dog Friendly is more important for Residents than Previous Visitors.

## Visitor Centers

- Both Residents and Previous Visitors older than 55 years old, give SLO County Visitor Centers a higher score for Importance than other age groups. Affluent (200k+) Residents and Previous Visitors give SLO County Visitor Centers the lowest score for Importance.

## Nightlife

- Residents under 35 years old score the Importance of SLO County Nightlife the highest.
- Generally speaking Previous Visitors see Nightlife as less important than the same age group of Residents.
- Affluent (200k+) Residents and Previous Visitors score SLO County Nightlife the lowest for Quality.

## Concerts & Shows

- Residents of all ages rate SLO County Concerts and Shows as a higher Importance than all ages of Previous Visitors.
- Affluent (200k+) Residents and Previous Visitors score SLO County Concerts and Shows the lowest for Quality.

## Vacation Rentals

- Residents and Previous Visitors who are 55+ year olds rate Vacation Rentals the lowest Importance, while affluent (200k+) Residents and Previous Visitors score Vacation Rentals the most important.

## Highway 1

- All age groups for Residents and Previous Visitors score Highway 1 as high Quality and high Importance, while affluent (200k+) Previous Visitors score Highway 1 as low Importance.

## Wine Country

- All age groups for Residents and Previous Visitors score Wine Country as high Quality and high Importance, while affluent (200k+) Residents and Previous Visitors score Wine Country as high Importance.

## Hotels and Motels

- Previous Visitors assign Hotel and Motels higher Importance and higher Quality in all age and income groups than Residents.

## Restaurants

- There is strong consistency between all age groups of Residents and Previous Visitors for the high Importance and high Quality of SLO County Restaurants. Affluent (200k+) Residents and Previous Visitors score Restaurants more important than other income groups.

## Sights and Landmarks

- The scores for SLO County Sights and Landmarks are high (Quality and Importance) with Residents of all ages scoring the category higher in Importance

then Previous Visitors. Affluent (200k+) Previous Visitors score Sights and Landmarks lowest for income groups.

- Residents and Previous Visitors rate Scenic Drives, Scenic Walking Areas, Piers & Boardwalks and Points of Interest & Landmarks the most Important within the category.

## Nature and Parks

- The scores for SLO County Nature and Parks are high (Quality and Importance) with Residents of all ages scoring the category higher for Importance than Previous Visitors. Affluent (200k+) Previous Visitors score Nature and Parks lowest for income groups.
  - The parts that score the highest Importance for Residents are Beaches, Bodies of Water, Nature & Wildlife Areas, Hiking Trails, State Parks and Parks.
  - The parts of that score the highest Importance for Previous Visitors are Beaches, Bodies of Water, Nature & Wildlife Areas, State Parks and Parks.
  - The parts that score the highest for Quality are Hiking Trails, Biking Trails, Geologic Formations, Forests, State Parks, Nature and Wildlife Areas and Beaches.

## Food and Drink

- Residents 35+ years old score SLO County Food and Drink experiences slight lower in Quality than Previous Visitors. Affluent (200k+) Residents and Previous Visitors score Food and Drink high for Importance.
  - The most important components of Food and Drink experiences for Residents and Previous Visitors are Farmers Markets, Wineries & Vineyards, Wine Tours & Tastings.
  - The parts that score the highest for Quality are Distillery Tours, Beer Tastings & Tours, and Wine Tours and Tastings.

## Outdoor Activities

- Residents under 55 years old score SLO County Outdoor Activities the highest for Importance, while 55+ years old Previous Visitors score it lowest for Importance. Affluent (200k+) Previous Visitors also score it lowest for Importance.
  - The most Important parts of Outdoor Activities for Residents and Previous Visitors are Beaches, Hiking Trails and Scenic Drives.

## Tours

- All groups generally score SLO County Tours the same for Importance, but 35-55 year old Residents, give Tours the lowest score for Quality. Affluent (200k+) Previous Visitors also score Tours the lowest for Quality.
  - The components of Tours that score the highest for Importance for Residents are Helicopter Tours and Scuba & Snorkeling Tours.
  - For Previous Visitors, the Tours that score the highest for Importance are Wine & Tasting Tours, Dolphin & Whale Watching, Nature & Wildlife, Food and Walking.

## Shopping

- Residents of all ages generally score SLO County Shopping more important than Previous Visitors, but Previous Visitors generally score SLO County Shopping higher for Quality. Affluent (200k+) Previous Visitors score shopping lowest for Importance, while affluent Residents score shopping highest for Importance.

## Museums

- Residents of all ages score SLO County Museums as more important than Previous Visitors, while Previous Visitors score this same category higher for Quality.
- Affluent (200k+) Residents and Previous Visitors score SLO County Museums lowest for Importance.

## Events and Festivals

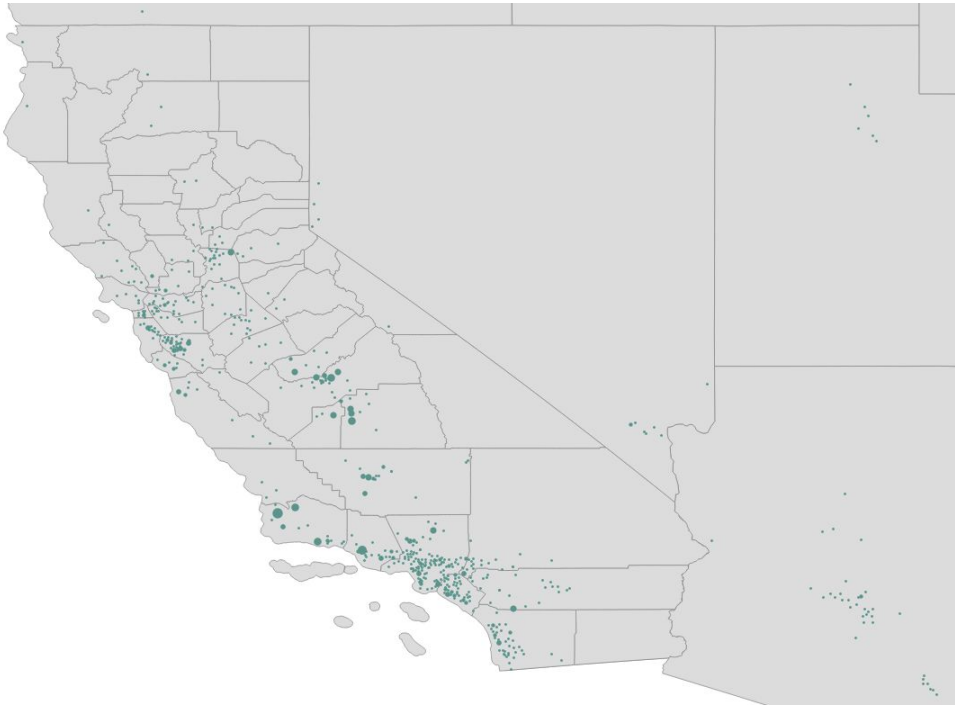
- Residents of all ages score SLO County Events and Festivals higher for Importance than Previous Visitors.
- Affluent (200k+) Previous Visitors score Events and Festivals lowest for Importance, while affluent Residents score Events and Festivals high for Importance.
- Both Residents and Previous Visitors rate Farmers Markets and Live Music & Concerts as the most important Events & Festivals for SLO County. They also rate Sports Events as the least important.

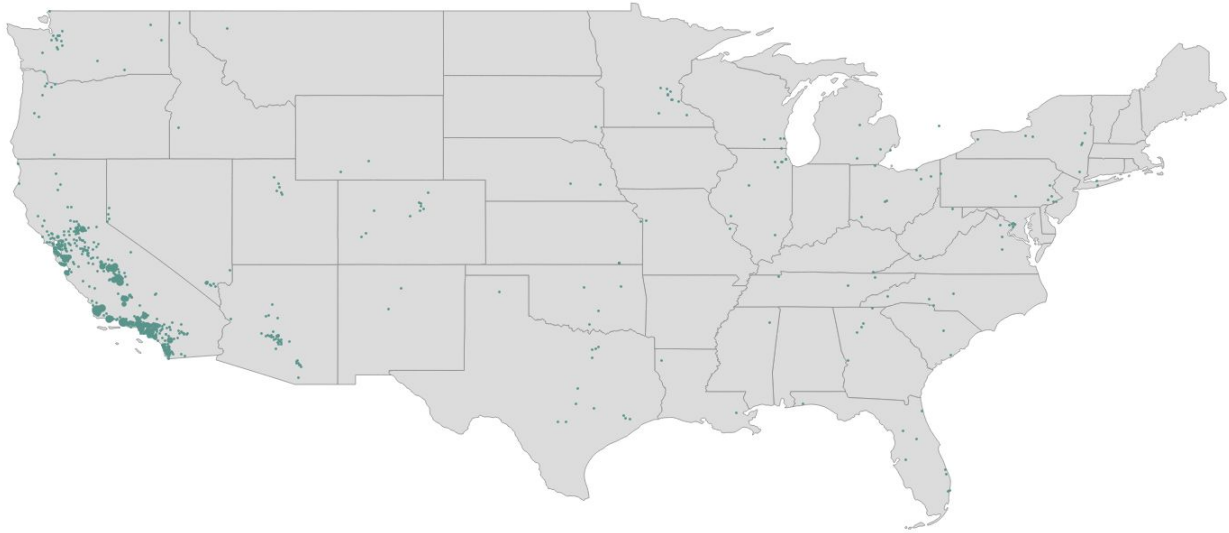


## DETAILED RESULTS

### Q1: What is your home zip / postal code? N=2,080.

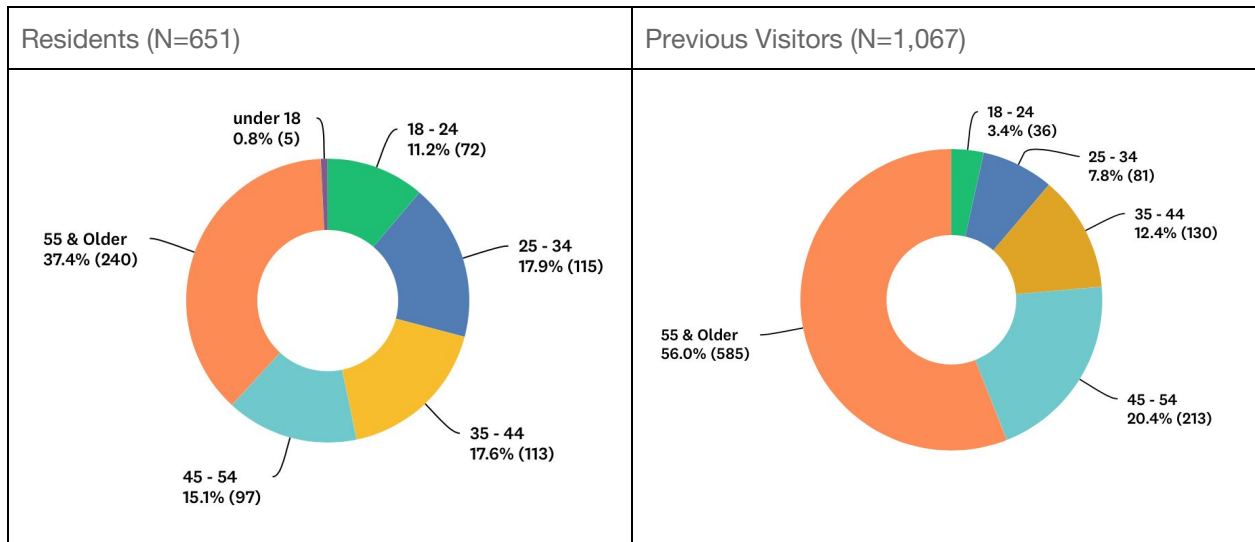
- The following map illustrates the zip codes for survey respondents (Previous Visitors only, N=1,067).





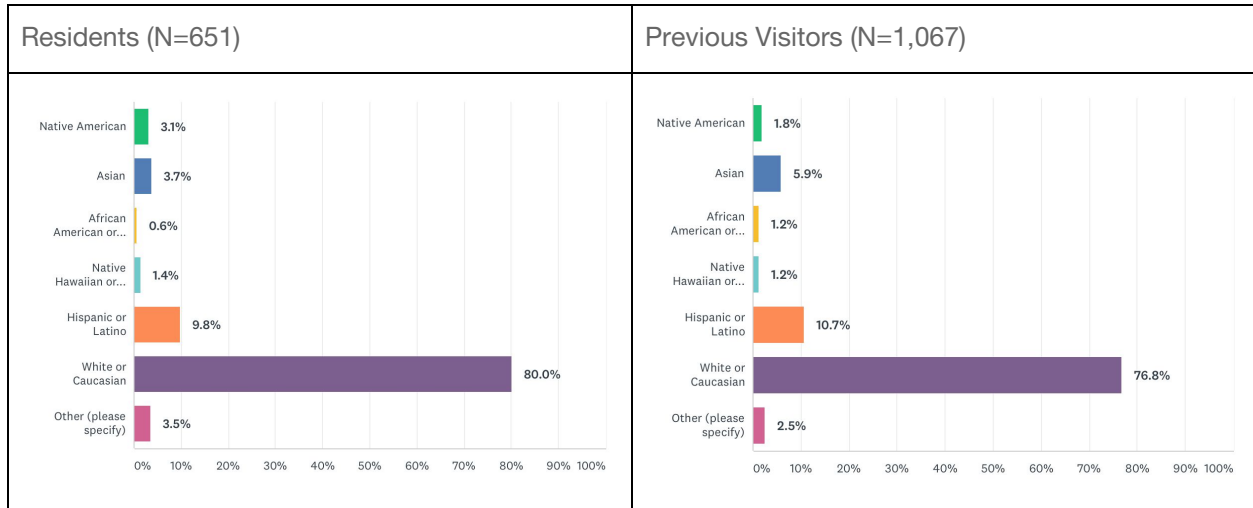
**Q2: What is your age?**

Resident respondents to the survey tended to be “younger” than Previous Visitor respondents with 47.5% less than 45 years old, while only 23.6% of Previous Visitors are less than 45 years of age. These results may suggest that San Luis Obispo County is not attracting younger visitors.



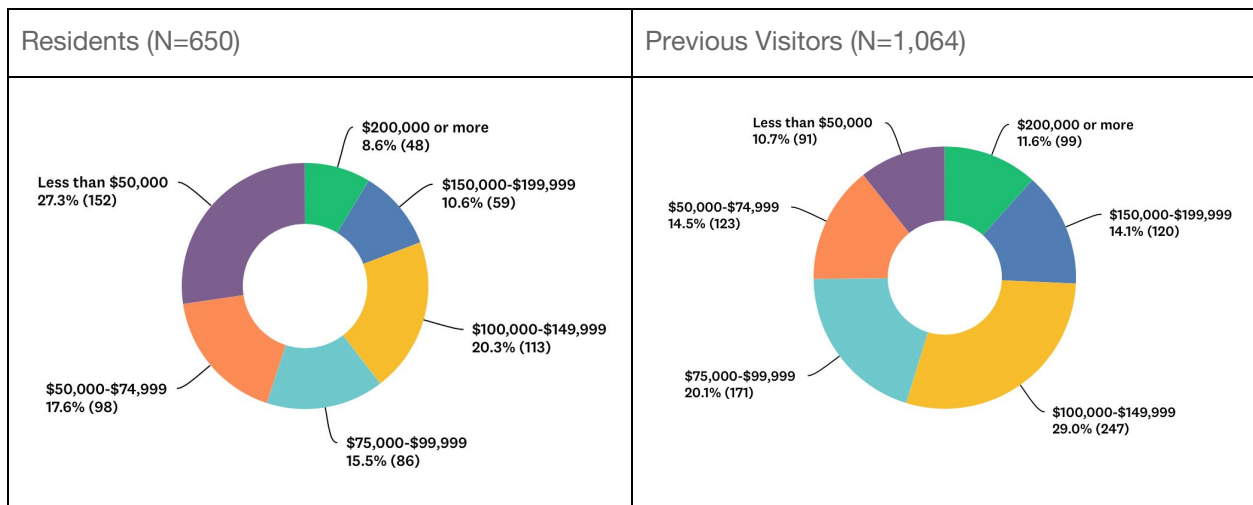
**Q3: To make sure we are representing the views of a broad mix of people, please indicate the ethnic group to which you belong. (Check all that apply)?**

Both Residents (80.0%) and Previous Visitors (76.8%) are mostly White or Caucasian. Previous Visitors are slightly more diverse than Residents.



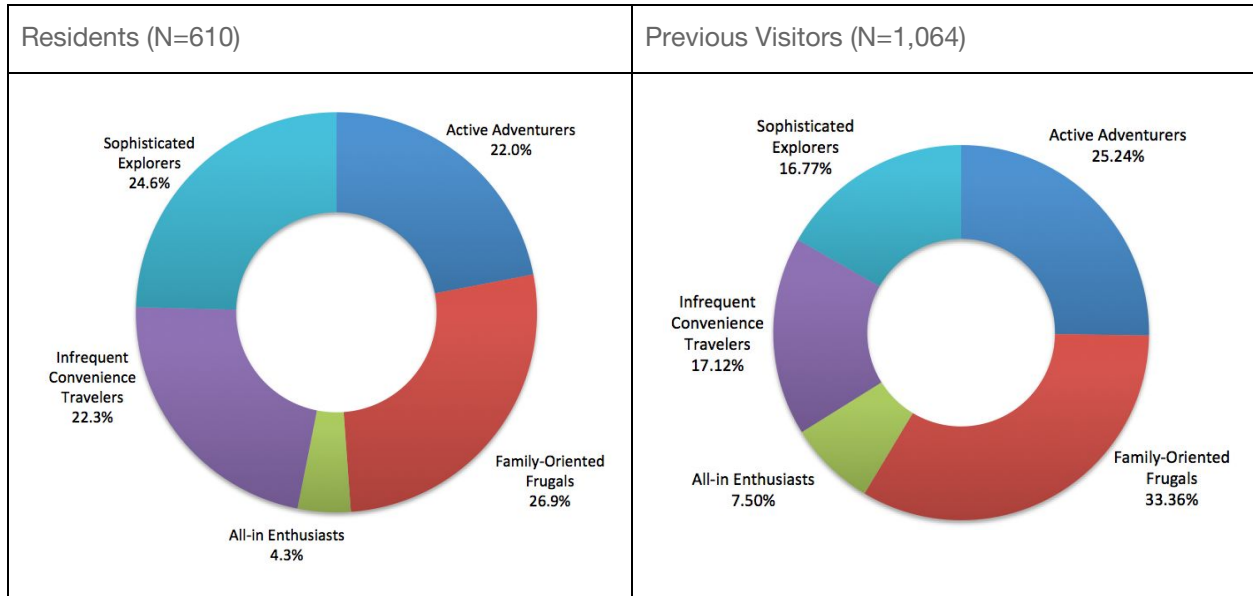
**Q4: Which of these ranges includes your total annual household income, before taxes for 2017?**

For those that indicated their income, Previous Visitors to SLO County tended to be more affluent than Residents of SLO County.



**Q5, Q6, Q7: These three questions were used to apply the Resonance Consultancy algorithm to segment SLO CAL’s Residents [live and work] and Previous Visitors.**

Survey respondents divide into the following psychographic segments:



Previous Visitors to SLO CAL are more likely than Residents to be Active Adventurers, Family-Oriented Frugals and All-in Enthusiasts, and less likely than Residents to be Infrequent Convenience Travelers and Sophisticated Explorers. Descriptors of each psychographic segment follows on the next page.

These results would suggest that Previous Visitors are more likely than Residents to be:

- Interested in outdoor activities and fitness, trying new things;
- Taking their family along for the trip, enjoying the safety of SLO CAL, and visiting fun attractions;
- Participating in most types of activities;
- Lower net worth; and
- Taking more frequent and shorter trips;

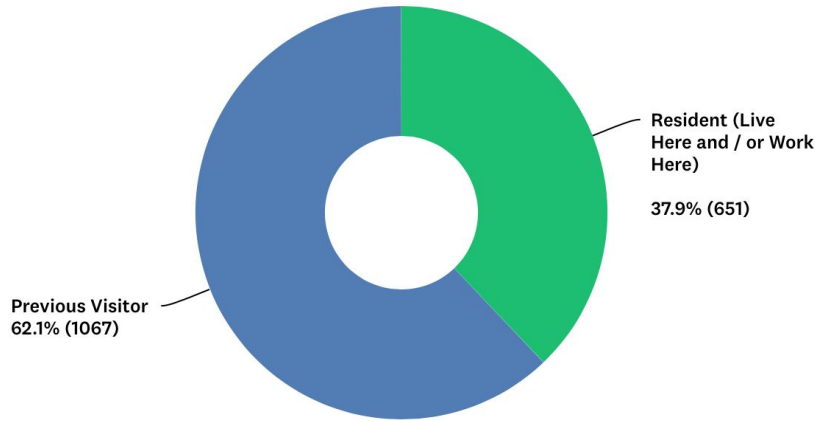
It also suggests that Previous Visitors are less likely than Residents to be:

- Interested in cultural activities, learning new things, attending cultural events and performances;
- Inactive or sedentary;
- Higher net worth
- Taking longer vacations

SEGMENT	DEMOGRAPHICS	TRIP CHARACTERISTICS	VACATION PREFERENCES
Sophisticated Explorers (20%)	<ul style="list-style-type: none"> <li>Slightly more female</li> <li>Older (59 years)</li> <li>Higher net worth</li> <li>More likely to be retired with no children at home</li> </ul>	<ul style="list-style-type: none"> <li>Take fewer but longer vacations per year</li> <li>Highest average vacation spend</li> </ul>	<ul style="list-style-type: none"> <li>More likely to enjoy sightseeing, visiting cultural attractions learning new things and attend cultural events &amp; performances</li> <li>Exploring new cultures and traditions while on vacation is most important</li> </ul>
All-in Enthusiasts (24%)	<ul style="list-style-type: none"> <li>Youngest segment (43 years)</li> <li>High % working full time (82%)</li> <li>High incidence of children at home (65%)</li> <li>Larger household size (3.5)</li> <li>High income (16% \$1M+) and high net worth (44% \$8M+)</li> </ul>	<ul style="list-style-type: none"> <li>More frequent trips per year</li> <li>More likely to travel for business</li> </ul>	<ul style="list-style-type: none"> <li>Interested in taking all types of trips</li> <li>All factors are important when deciding on a destination</li> <li>More likely to participate in most types of activities</li> <li>Go on vacations for all the different reasons</li> </ul>
Active Adventurers (36%)	<ul style="list-style-type: none"> <li>Similar profile to typical Top 5% traveler (53 years, average HH size of 2.8, 56% employed full time)</li> </ul>	<ul style="list-style-type: none"> <li>Take most frequent trips per year overall (17.6)</li> <li>More likely to travel for business</li> <li>Largest number of hotel night stays per year (33)</li> <li>Higher average vacation spend</li> </ul>	<ul style="list-style-type: none"> <li>Greater interest in fitness and outdoor activities – engaging with nature, health &amp; fitness, outdoor sports and participating in athletic competitions</li> <li>Like going on vacations that allow them to try new things</li> <li>Participating in sports &amp; outdoor activities is important while on vacation</li> </ul>
Occasional Convenience Travelers (8%)	<ul style="list-style-type: none"> <li>Oldest segment (60 years)</li> <li>More likely to be retired with no children at home</li> </ul>	<ul style="list-style-type: none"> <li>Take shorter trips per year</li> <li>Least likely to travel for business</li> <li>Lower average vacation spend</li> </ul>	<ul style="list-style-type: none"> <li>Safety, favorable weather and English spoken are important decision factors</li> <li>Less likely to participate in all vacation activities, except dining</li> </ul>
Family Oriented Frugals (13%)	<ul style="list-style-type: none"> <li>Average age of 55 years</li> <li>Lower net worth</li> </ul>	<ul style="list-style-type: none"> <li>Take fewer and shorter trips per year</li> <li>Lower average vacation spend</li> </ul>	<ul style="list-style-type: none"> <li>Place greater importance on safety, English spoken, US currency accepted and cost.</li> <li>More likely to visit fun attractions while on vacation</li> <li>Greater interest in taking family vacation with kids</li> </ul>

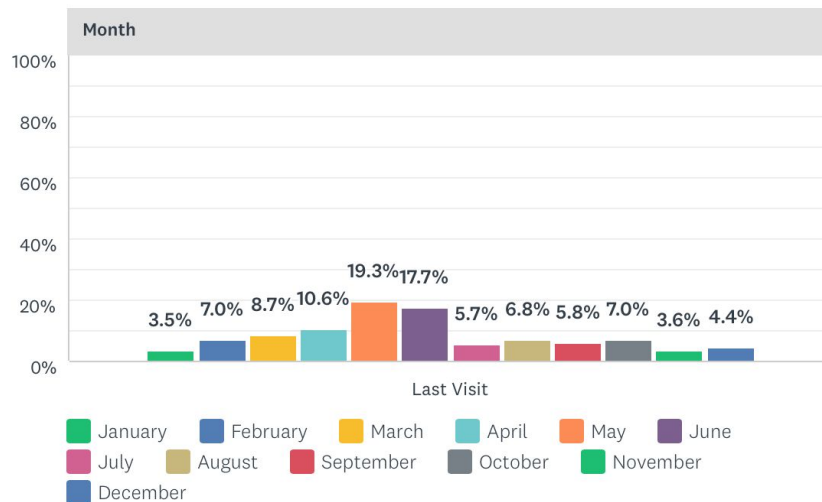
### Q8: Are you a resident or previous visitor to San Luis Obispo County?

37.9% (N=651) of respondents identified as Resident (Live Here or Work Here), while 62.1% (N=1067) of respondents identified as Previous Visitors.

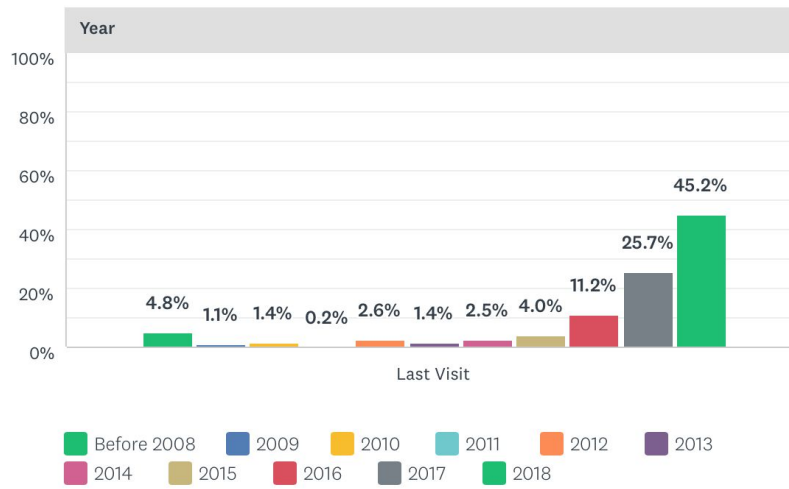


### Q9: When was your last visit to SLO CAL?

April, May, and June are reported as the most recent visit to SLO CAL by Previous Visitors. Please note that these results may have been impacted by the timing of the survey, which was conducted in June 2018.

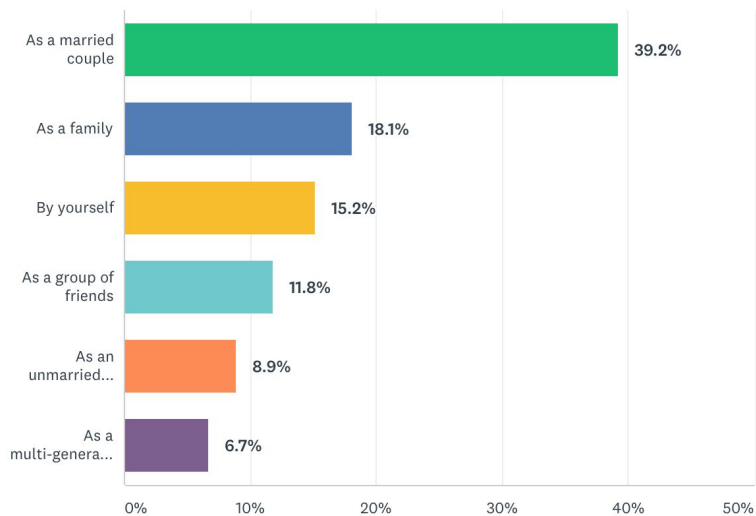


The vast majority of Previous Visitors (82.1%) came to SLO CAL in the past two and a half years, so their visitor experience is recent and fresh to mind.



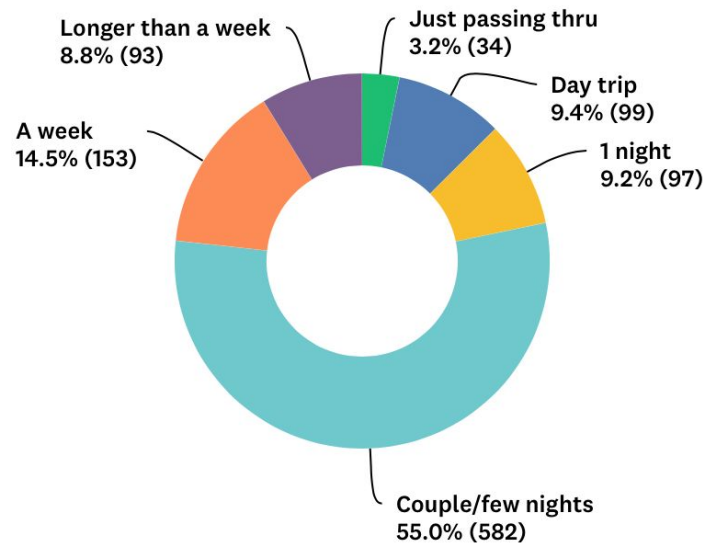
### Q10: Did you travel ...

Previous Visitors (n=1,058) to SLO CAL tended to visit as a married or unmarried couple (48.1%) or immediate or multi-generational family (24.8%). Only 15.2% of Previous Visitors came solo.



### Q11: How long did you stay on your last visit?

Nearly two thirds of visitors (64.2%) came to SLO CAL for a getaway trip (1 night or couple/few nights). Those who stayed longer (a week or more) totalled nearly one fourth (23.3%), while day trippers or those passing thru totaled 12.6%. Generally speaking, this breakout would suggest that SLO CAL is a short visit (less than a week) destination.



For Previous Visitors that arrived by auto / motorcycle, approximately 14.1% were passing thru or just stayed for the day. Another 10.4% stayed one night, more than half stayed a couple/few nights and 18.0% stayed a week or longer.

For those Previous Visitors that arrived by Commercial Airline, nearly half stayed a couple/few nights and a similar number stayed a week or longer.

For Previous Visitors by Motor Home / RV, more than half stayed a week or more.

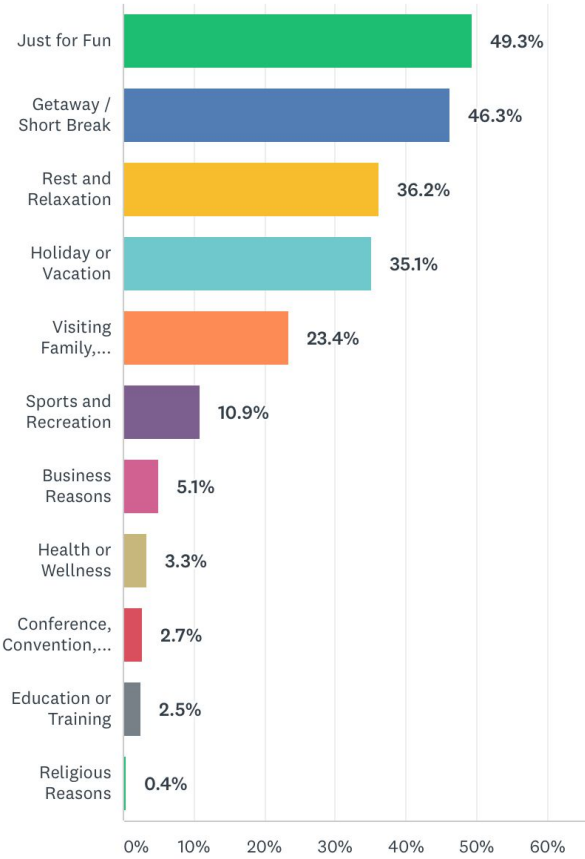
For those that arrived by Train, Boat, Bus and Charter Jet, the sample size is too small to make definitive statements.

	Just passing thru	Day trip	1 night	Couple/few nights	A week	Longer than a week	Total
Automobile / Motorcycle	3.5%	10.6%	10.4%	57.6%	11.7%	6.3%	83.5%
Commercial Airline	2.7%	2.7%	1.3%	46.7%	26.7%	20.0%	7.1%
Motor Home / RV	1.8%	0.0%	3.5%	38.6%	33.3%	22.8%	5.4%
Train / Amtrak	0.0%	11.1%	0.0%	44.4%	27.8%	16.7%	1.7%
Boat (Sail or Motor)	0.0%	0.0%	50.0%	0.0%	50.0%	0.0%	0.2%
Bus / Coach (Public)	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.1%
Bus / Coach (Private Tour)	0.0%	50.0%	0.0%	50.0%	0.0%	0.0%	0.2%
Charter Jet / Aircraft	0.0%	0.0%	5.3%	42.1%	21.1%	31.6%	1.8%
<b>Total</b>	<b>3.2%</b>	<b>9.3%</b>	<b>9.1%</b>	<b>55.1%</b>	<b>14.4%</b>	<b>8.8%</b>	<b>100.0%</b>



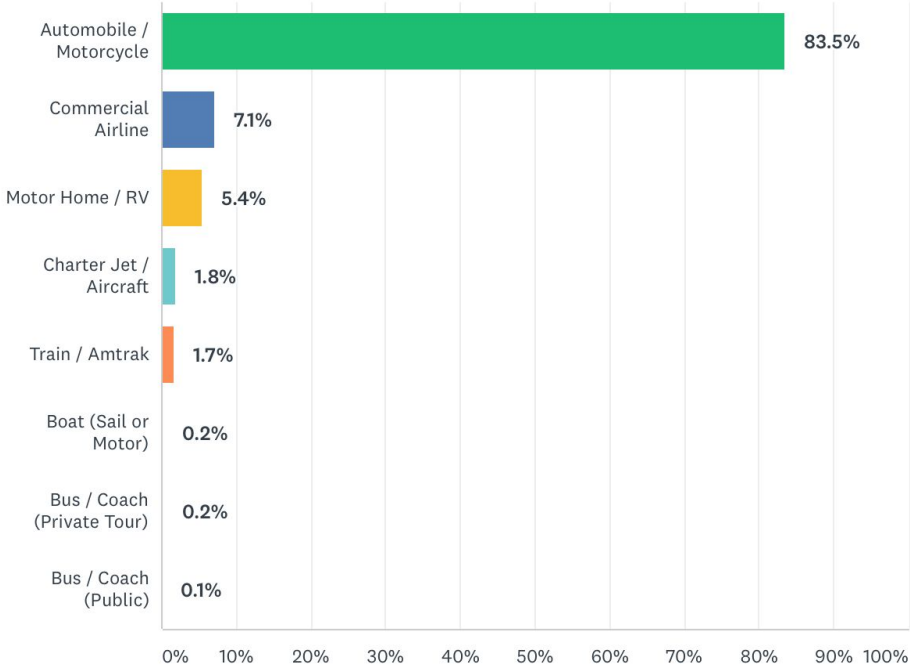
**Q12: What were the main reasons for your last visit to SLO CAL? (check all that apply)? N=1,058**

Nearly half of respondents came to SLO CAL “Just for Fun” (49.3%), followed by Getaway / Short Break (46.3%), Rest and Relaxation (36.2%) and Holiday or Vacation (35.1%). Visiting Family and Friends scored 23.4%, while Sports and Recreation scored 12.9%. Business Reasons, Conference and Convention, Education and Training were particularly low on the list of reasons Previous Visitors came to SLO CAL.



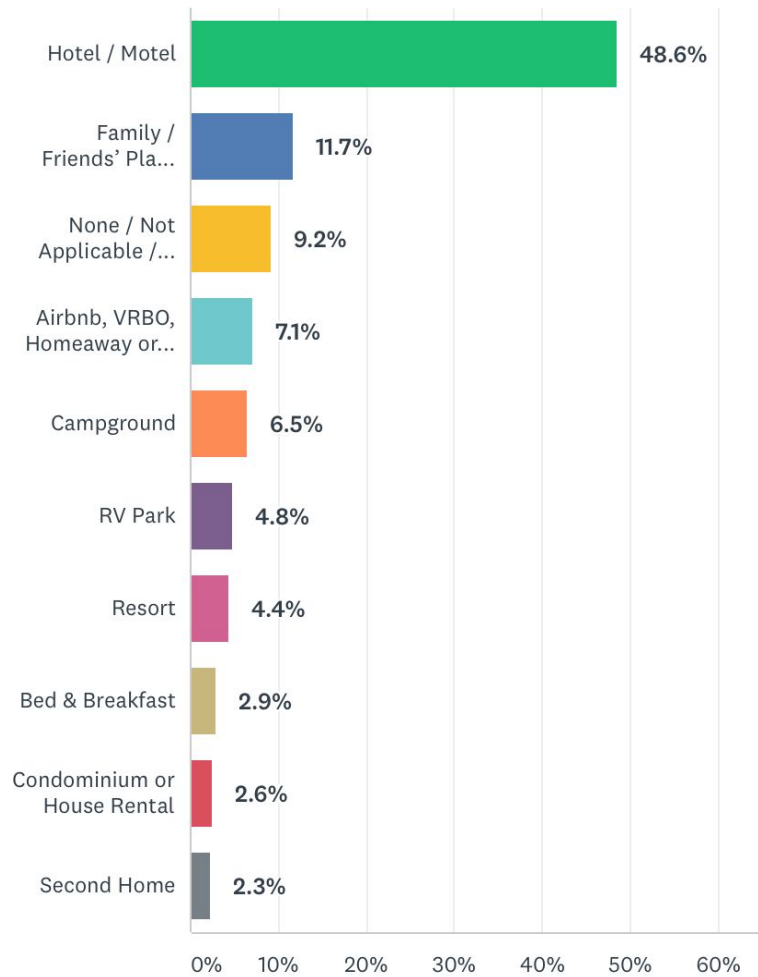
**Q13: How did you get to the area? N=1,052**

83.5% of respondents came to SLO CAL by Auto/Motorcycle, 7.1% by Airline and 5.4% by Motor Home / RV. These results confirm that Train / Amtrak travel to SLO CAL at 1.7% is not a major mode of transportation. For those that arrived by Air, they tended to stay longer and came alone or as a married couple.



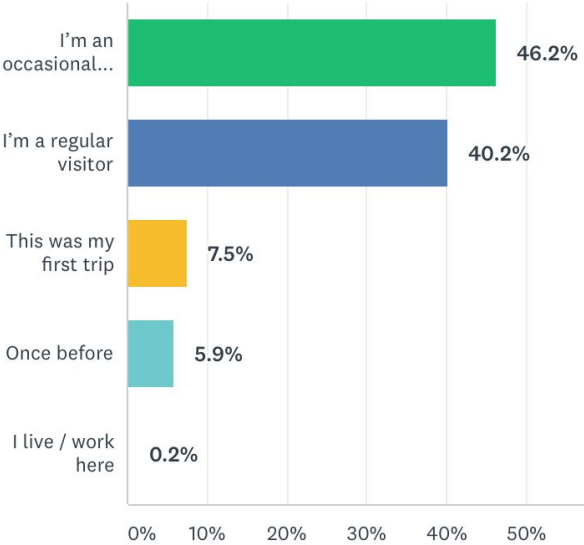
### Q14: What kind of accommodation did you use during your visit? N=1,052

More than half (53.0%) of Previous Visitors stayed in a Hotel / Motel or Resort, while only 11.7% stayed with Family / Friends. Slightly less than 10% rented a condo or vacation home directly or with one of the online services. Another 11.3% came to SLO CAL for camping or RVing.



**Q15: How frequently do you come to SLO CAL? N=1,052**

Most visitors have been to SLO CAL before (92.5%) and 40.2% are regular visitors. These results would suggest that it should be easy to identify and target future guests since they have been to SLO CAL before, and that quality tourism product, excellent customer service and new visitor activities and amenities should be an important destination focus to encourage repeat visitation.













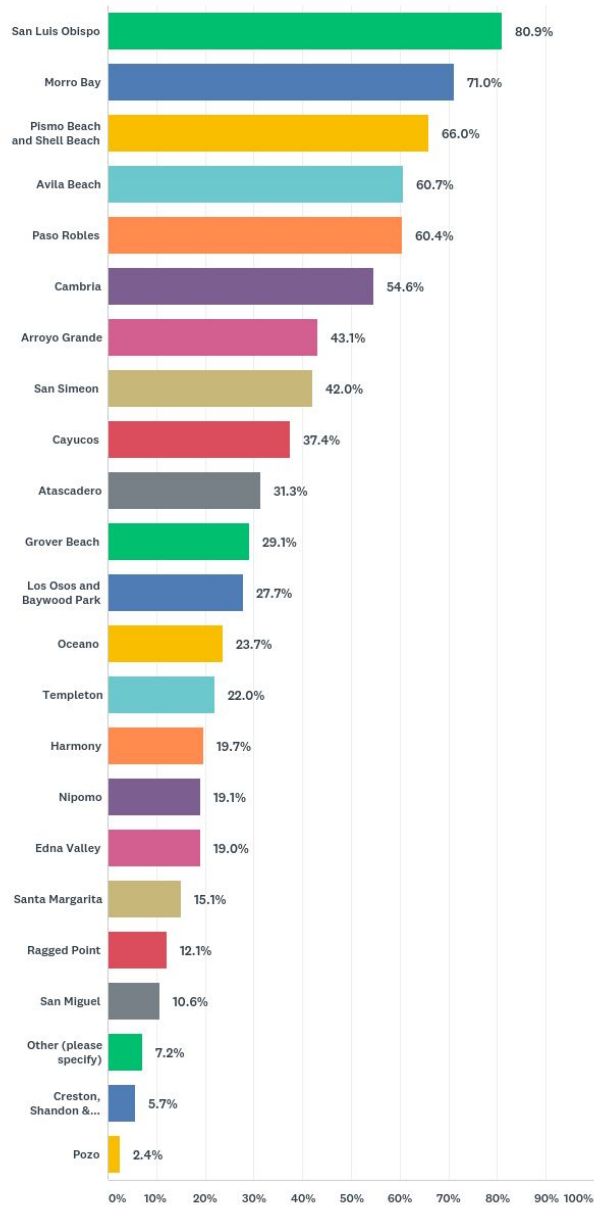






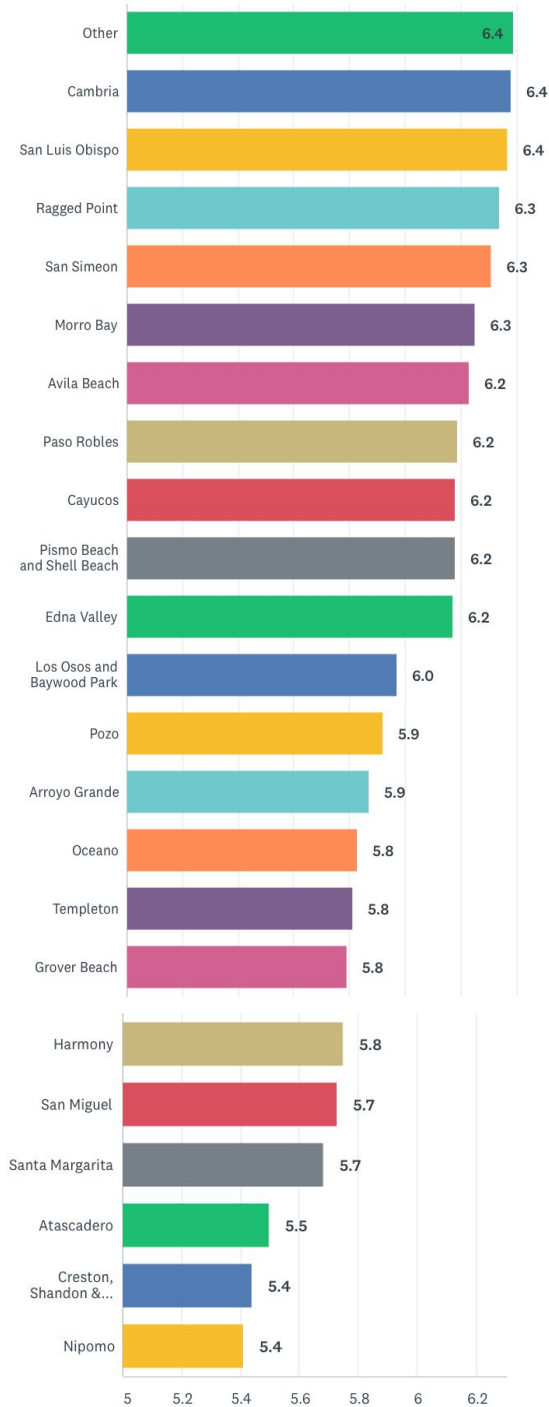
**Q23: On all your visits to SLO CAL, which of these specific places did you visit?  
N=980**

Previous Visitors reported that they most often visited San Luis Obispo City 80%, followed by Morro Bay 71%, Pismo and Shell Beaches 66%, Paso Robles 60% and Cambria 55%.



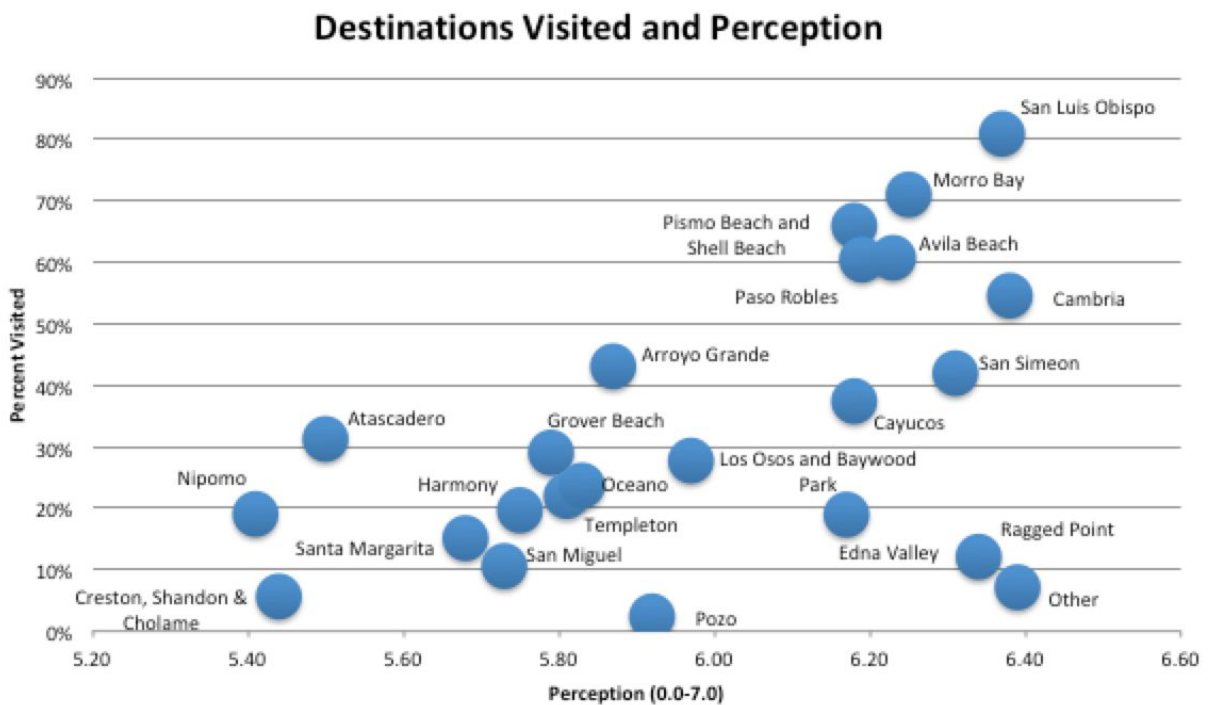
**Q24: On the whole, what was your perception of the places you visited? N=991**

Previous Visitors reported that they most liked Cambria and San Luis Obispo City at 6.4/7.0; followed by Ragged Point, San Simeon and Morro Bay at 6.3/7.0; Avila Beach, Paso Robles, Cayucos, Pismo Beach and Shell Beaches at 6.2/7.0.



### Q23/Q24: Combining destinations visited with perceptions of those places.

The destinations in the upper right are most visited and highest ranked (San Luis Obispo, Morro Bay, Pismo Beach and Shell Beach, Avila Beach, Paso Robles and Cambria). The destinations in the lower left are the least visited and lowest ranked (Creston, Shandon & Cholame, Nipomo, Santa Margarita, San Miguel and Atascadero). The destinations in the lower right are the least visited and highest ranked (Ragged Point, Edna Valley, Cayucos and San Simeon).





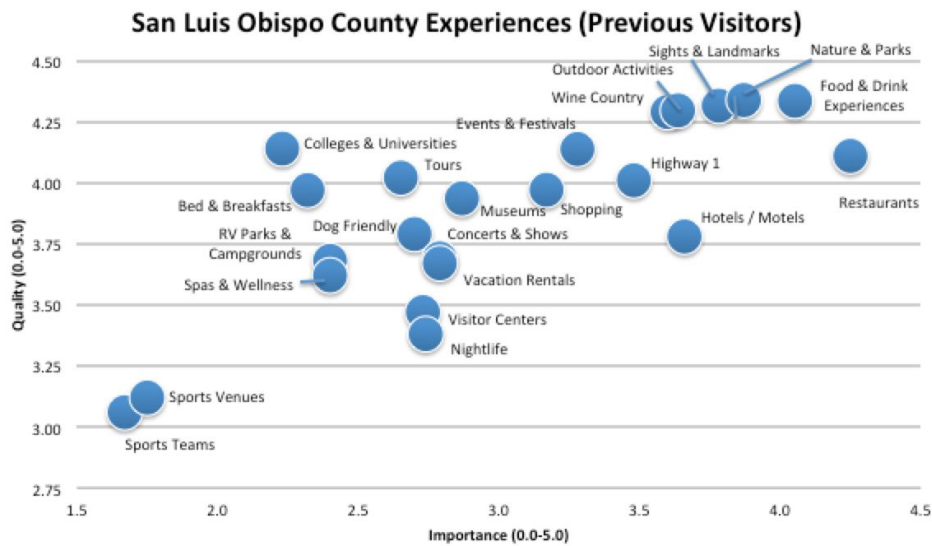




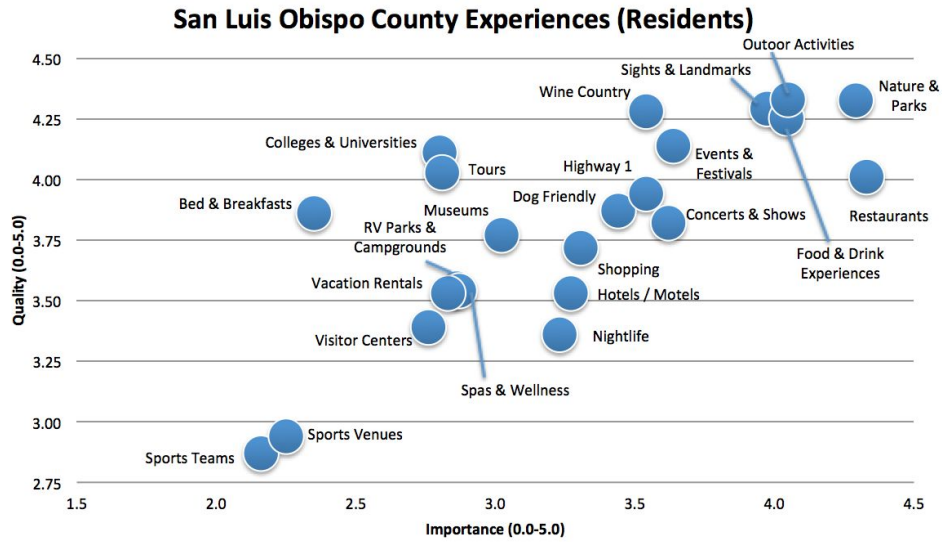
**Q27, Q28, Q29, Q30, Q32, Q33, Q35, Q36, Q38, Q39, Q41, Q42, Q44, Q45, Q47, Q48, Q50, and Q51 combines Which aspects of the SLO CAL "experience" were (are) important to you in deciding to visit (or live/work in) the area? and How would you rate the overall quality of the SLO CAL "experience"?**

Combining the results for these questions illustrates which experiences are important (low Importance to high Importance) and Quality (low Quality to high Quality).

For Previous Visitors (n=943), the experiences in the upper right are most Important and highest Quality experiences including: Food & Drink Experiences (i.e. Wine Tasting) Restaurants, Nature & Parks, Sights & Landmarks, Outdoor Activities and Wine Country. The experiences in the lower left are the least Important and lowest Quality including: Sport Venues and Sports Teams.



For Residents (n=494), most Important and highest Quality experiences (upper right) include: Nature & Parks, Outdoor Activities, Sights & Landmarks, Food & Drink Experiences, Restaurants Wine Country and Events & Festivals. The least Important and lowest Quality experiences (lower left) include: Sport Venues and Sports Teams.

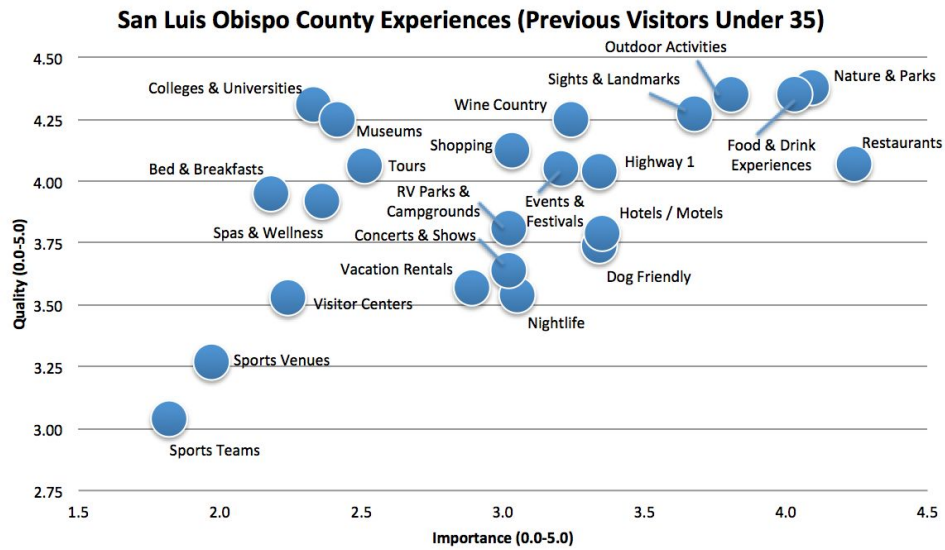


If Quality and Importance are equal factors for these categories and if resident and previous visitor groups are treated equally for these categories, the combination ranking follows, with Nature & Parks ranking as the most important/quality category of the SLO County Experience, followed by Restaurants, Food & Drink Experiences (Wine Tastings, etc.), Sights & Landmarks, Outdoor Activities, Wine Country, Events & Festivals and Highway 1. The least important/quality categories of the SLO County Experience are Sports Teams and Sports Venues.

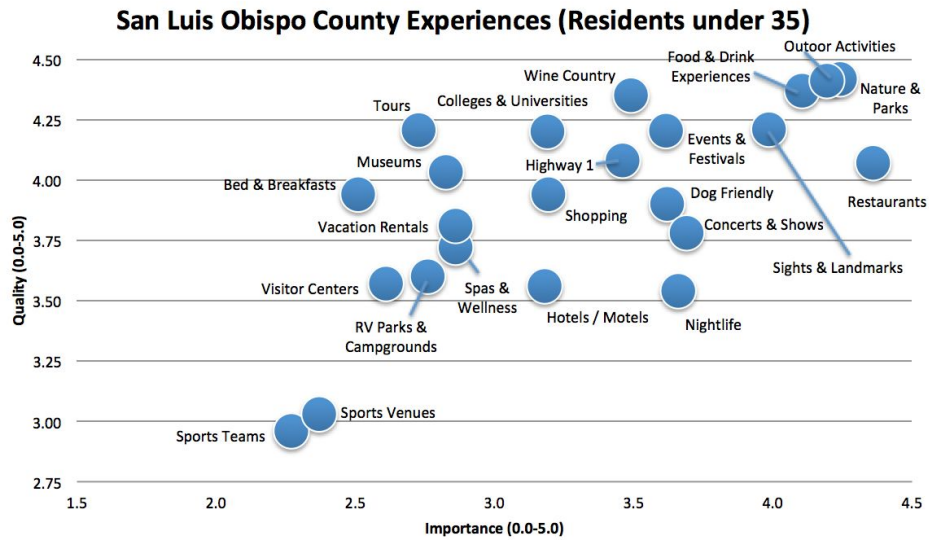
<b>Combo Rank</b>	<b>Combo Score</b>
1 Nature & Parks	16.83
2 Restaurants	16.70
3 Food & Drink Experiences	16.68
4 Sights & Landmarks	16.36
5 Outdoor Activities	16.31
6 Wine Country	15.71
7 Events & Festivals	15.19
8 Highway 1	14.97
9 Hotels / Motels	14.24
10 Shopping	14.16
11 Concerts & Shows	13.92
12 Dog Friendly	13.80
13 Museums	13.60
14 Tours	13.51
15 Colleges & Universities	13.28
16 Vacation Rentals	12.82
17 Nightlife	12.71
18 Bed & Breakfasts	12.50
19 RV Parks & Campgrounds	12.49
20 Spas & Wellness	12.43
21 Visitor Centers	12.35
22 Sports Venues	10.06
23 Sports Teams	9.76

Combo Score = Resident Importance score + Resident Quality score + Previous Visitor Importance score + Previous Visitor Quality score.

Following are the Previous Visitor scores for Under 35 Year Olds. (N=100)



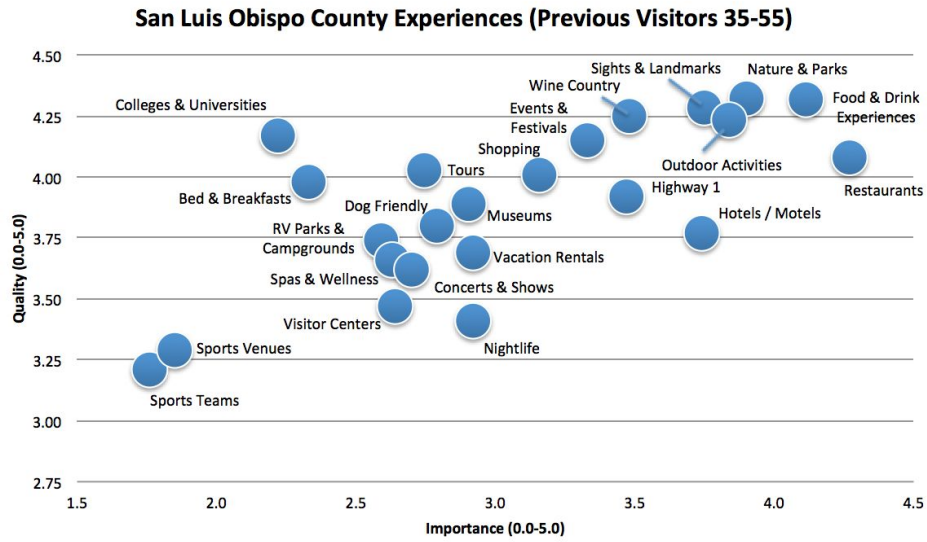
Following are the Resident scores for Under 35 Year Olds. (N=140)



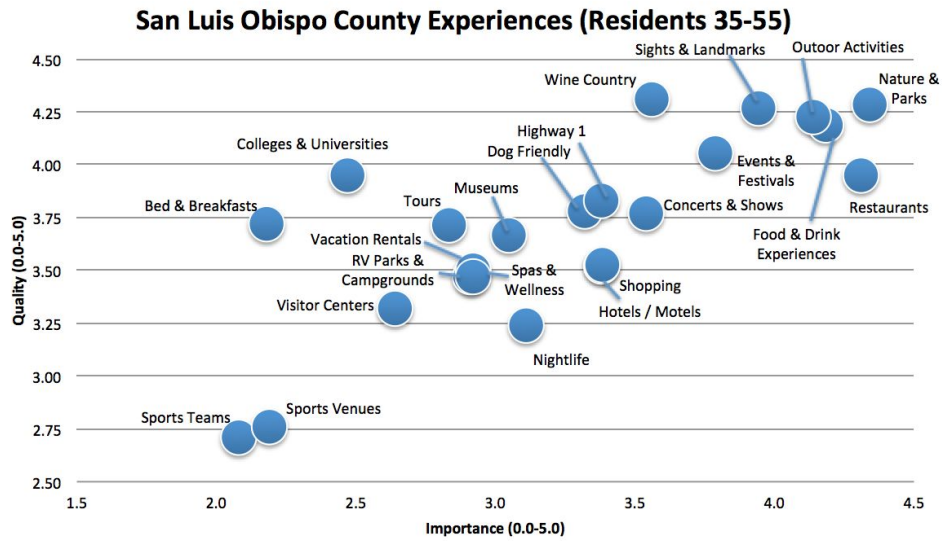
Following are the combination scores for Under 35 Year Olds (Residents and Previous Visitors). (N=240)

<b>Combo Rank Under 35 Years Old</b>	<b>Combo Score</b>
1 Nature & Parks	17.13
2 Food & Drink Experiences	16.85
3 Outdoor Activities	16.76
4 Restaurants	16.74
5 Sights & Landmarks	16.14
6 Wine Country	15.33
7 Events & Festivals	15.07
8 Highway 1	14.92
9 Dog Friendly	14.60
10 Shopping	14.29
11 Concerts & Shows	14.13
12 Colleges & Universities	14.03
13 Hotels / Motels	13.88
14 Nightlife	13.79
15 Museums	13.52
16 Tours	13.51
17 RV Parks & Campgrounds	13.19
18 Vacation Rentals	13.13
19 Spas & Wellness	12.86
20 Bed & Breakfasts	12.58
21 Visitor Centers	11.95
22 Sports Venues	10.64
23 Sports Teams	10.09

Following are the Previous Visitor scores for 35-55 Year Olds. (N=305)



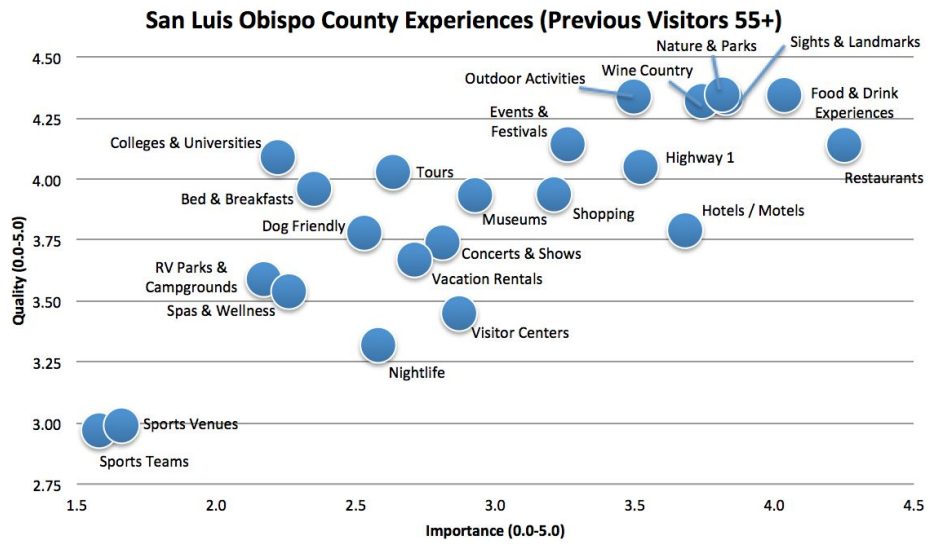
Following are the Resident scores for 35-55 Year Olds. (N=170)



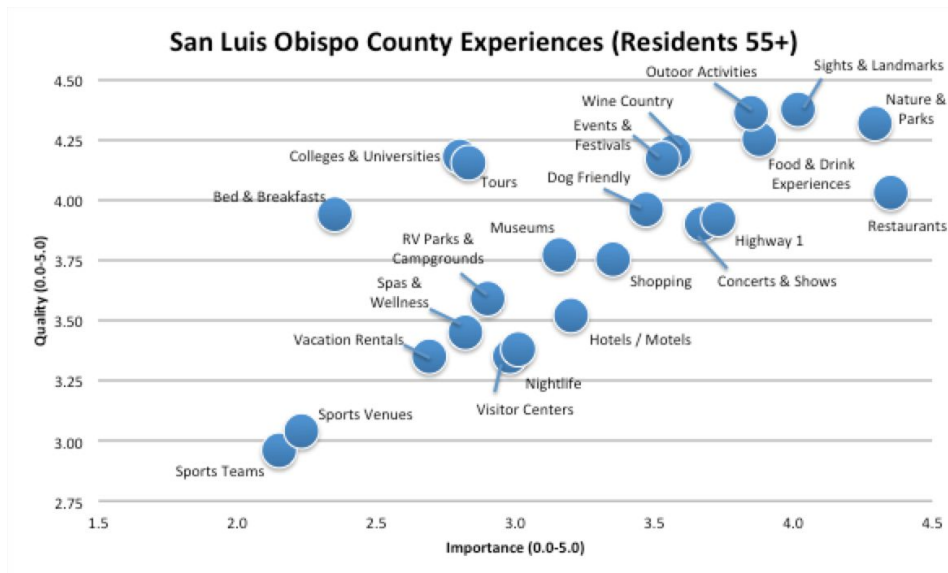
Following are the combination scores for 35-55 Year Olds (Residents and Previous Visitors). (N=475)

<b>Combo Rank 35-55 Years Old</b>	<b>Combo Score</b>
1 Nature & Parks	16.85
2 Food & Drink Experiences	16.80
3 Restaurants	16.61
4 Outdoor Activities	16.44
5 Sights & Landmarks	16.24
6 Wine Country	15.60
7 Events & Festivals	15.32
8 Highway 1	14.60
9 Hotels / Motels	14.41
10 Shopping	14.08
11 Dog Friendly	13.69
12 Concerts & Shows	13.63
13 Museums	13.51
14 Tours	13.32
15 Vacation Rentals	13.00
16 Colleges & Universities	12.81
17 Spas & Wellness	12.71
18 RV Parks & Campgrounds	12.71
19 Nightlife	12.68
20 Bed & Breakfasts	12.21
21 Visitor Centers	12.07
22 Sports Venues	10.09
23 Sports Teams	9.76

Following are the Previous Visitor scores for 55+ Year Olds. (N=480)



Following are the Resident scores for 55+ Year Olds. (N=175)

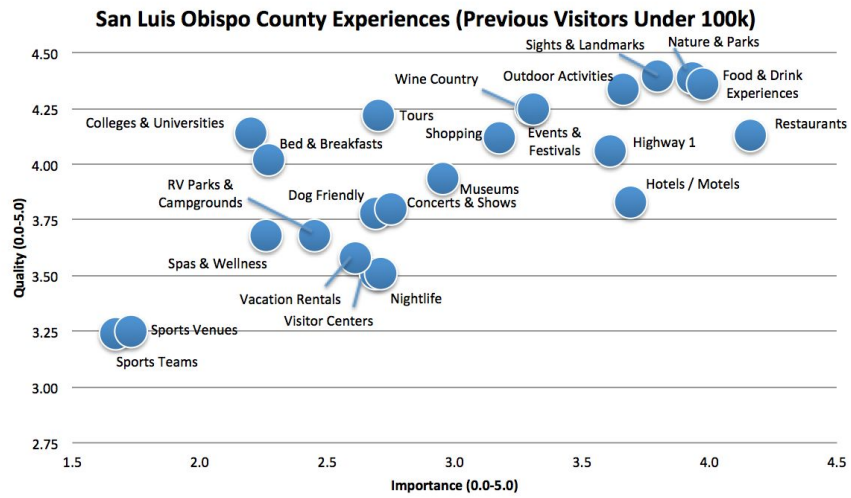




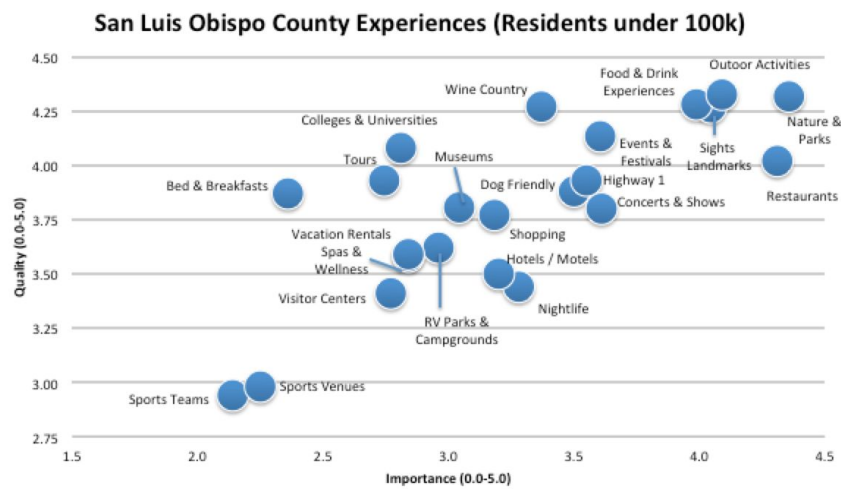
Following are the combination scores for 55+ Year Olds (Residents and Previous Visitors).  
(N=655)

<b>Combo Rank</b>	<b>35-55 Years Old</b>	<b>Combo Score</b>
1	Nature & Parks	16.77
2	Restaurants	16.77
3	Sights & Landmarks	16.55
4	Food & Drink Experiences	16.51
5	Outdoor Activities	16.04
6	Wine Country	15.83
7	Highway 1	15.22
8	Events & Festivals	15.10
9	Shopping	14.25
10	Hotels / Motels	14.19
11	Concerts & Shows	14.12
12	Museums	13.79
13	Dog Friendly	13.74
14	Tours	13.65
15	Colleges & Universities	13.29
16	Visitor Centers	12.65
17	Bed & Breakfasts	12.60
18	Vacation Rentals	12.42
19	Nightlife	12.29
20	RV Parks & Campgrounds	12.25
21	Spas & Wellness	12.07
22	Sports Venues	9.92
23	Sports Teams	9.66

Following are the Previous Visitor scores for Income under 100K. (N=129)



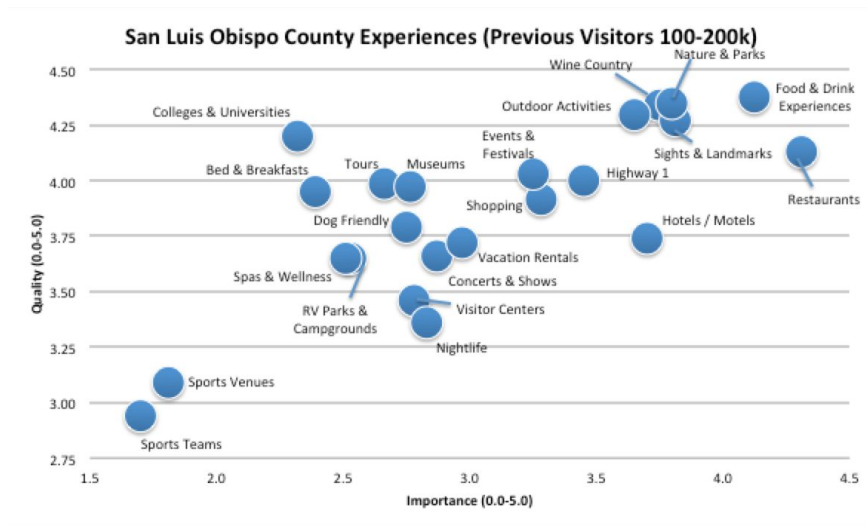
Following are the Resident scores for Income under 100K. (N=127)



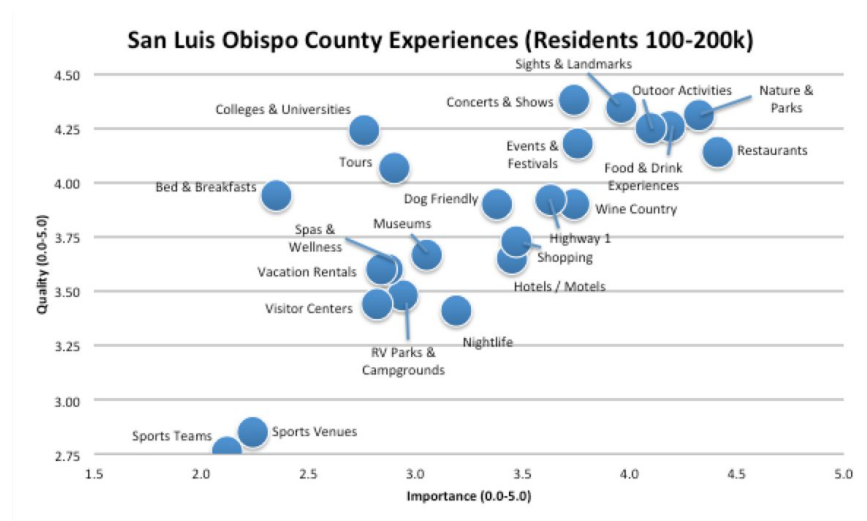
Following are the combination scores for Income under 100K (Residents and Previous Visitors). (N=256)

<b>Combo Rank Under 100k Income</b>	<b>Combo Score</b>
1 Nature & Parks	16.99
2 Restaurants	16.62
3 Food & Drink Experiences	16.60
4 Sights & Landmarks	16.50
5 Outdoor Activities	16.41
6 Events & Festivals	15.29
7 Wine Country	15.19
8 Highway 1	15.15
9 Shopping	14.25
10 Hotels / Motels	14.22
11 Concerts & Shows	13.96
12 Dog Friendly	13.85
13 Museums	13.74
14 Tours	13.59
15 Colleges & Universities	13.23
16 Nightlife	12.94
17 RV Parks & Campgrounds	12.71
18 Vacation Rentals	12.62
19 Bed & Breakfasts	12.52
20 Visitor Centers	12.38
21 Spas & Wellness	12.36
22 Sports Venues	10.21
23 Sports Teams	9.99

Following are the Previous Visitor scores for Income between 100k-200k. (N=132)



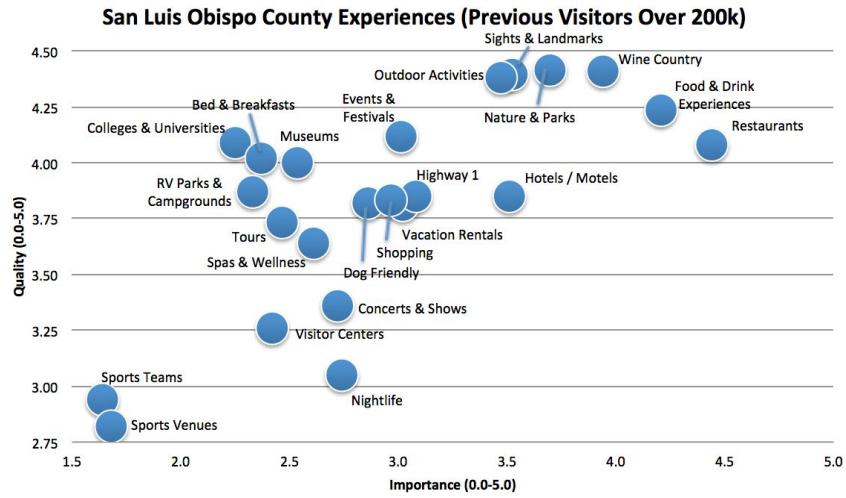
Following are the Resident scores for Income between 100k-200k. (N=69)



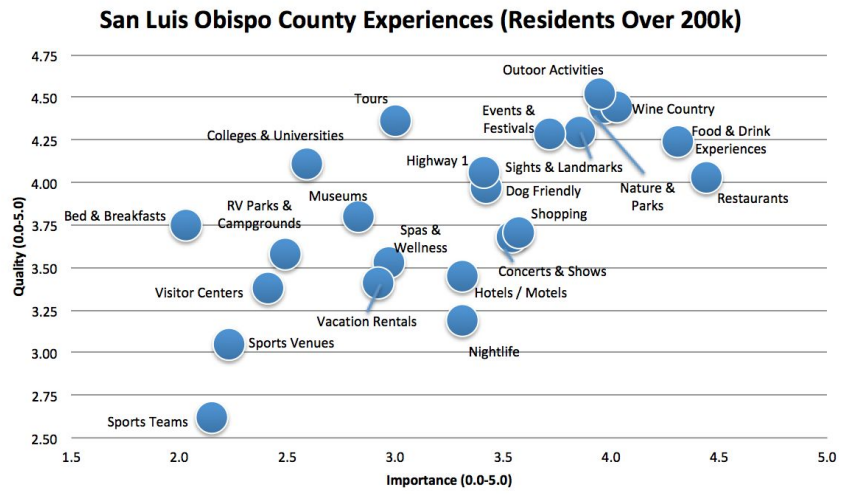
Following are the combination scores for Income between 100k-200k (Residents and Previous Visitors). (N=204)

<b>Combo Rank</b>	<b>100k-200k Income</b>	<b>Combo Score</b>
1	Restaurants	16.99
2	Food & Drink Experiences	16.94
3	Nature & Parks	16.78
4	Sights & Landmarks	16.39
5	Outdoor Activities	16.29
6	Wine Country	16.21
7	Events & Festivals	15.22
8	Highway 1	15.00
9	Hotels / Motels	14.54
10	Shopping	14.40
11	Concerts & Shows	14.17
12	Dog Friendly	13.82
13	Tours	13.62
14	Colleges & Universities	13.52
15	Museums	13.46
16	Vacation Rentals	13.13
17	Nightlife	12.79
18	Spas & Wellness	12.63
19	Bed & Breakfasts	12.63
20	RV Parks & Campgrounds	12.60
21	Visitor Centers	12.50
22	Sports Venues	9.99
23	Sports Teams	9.52

Following are the Previous Visitor scores for Income over 200K. (N=87)



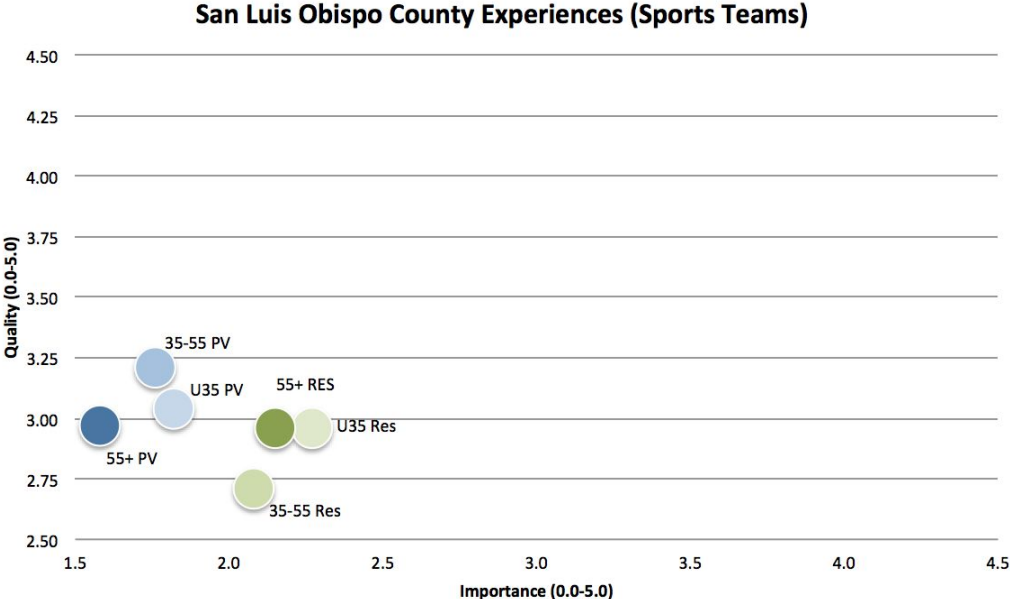
Following are the Resident scores for Income over 200K. (N=39)



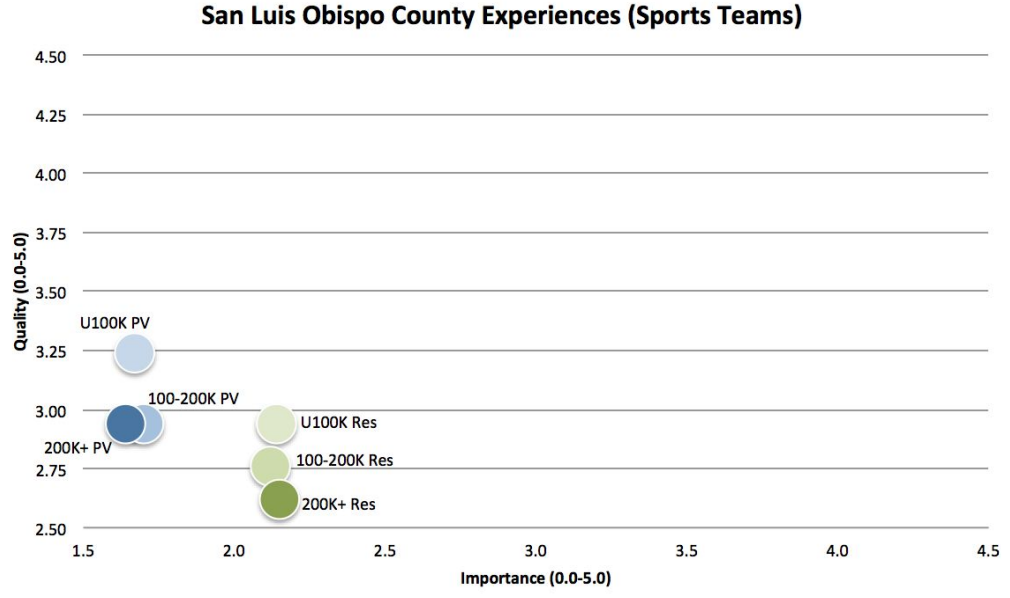
Following are the combination scores for Income over 200K (Residents and Previous Visitors). (N=129)

<b>Combo Rank Over 200k Income</b>	<b>Combo Score</b>
1 Food & Drink Experiences	16.99
2 Restaurants	16.99
3 Wine Country	16.76
4 Nature & Parks	16.58
5 Outdoor Activities	16.32
6 Sights & Landmarks	16.07
7 Events & Festivals	15.13
8 Highway 1	14.40
9 Hotels / Motels	14.12
10 Shopping	14.08
11 Dog Friendly	14.07
12 Tours	13.56
13 Concerts & Shows	13.30
14 Museums	13.16
15 Vacation Rentals	13.16
16 Colleges & Universities	13.04
17 Spas & Wellness	12.75
18 Nightlife	12.29
19 RV Parks & Campgrounds	12.27
20 Bed & Breakfasts	12.17
21 Visitor Centers	11.47
22 Sports Venues	9.78
23 Sports Teams	9.35

Reviewing the categories one-by-one provides additional insight to understand the dynamics between resident / previous visitors and individual age groups (under 35, 35-55 and 55+), as well as income groups (Under 100K, 100k-200k and Over 200k).

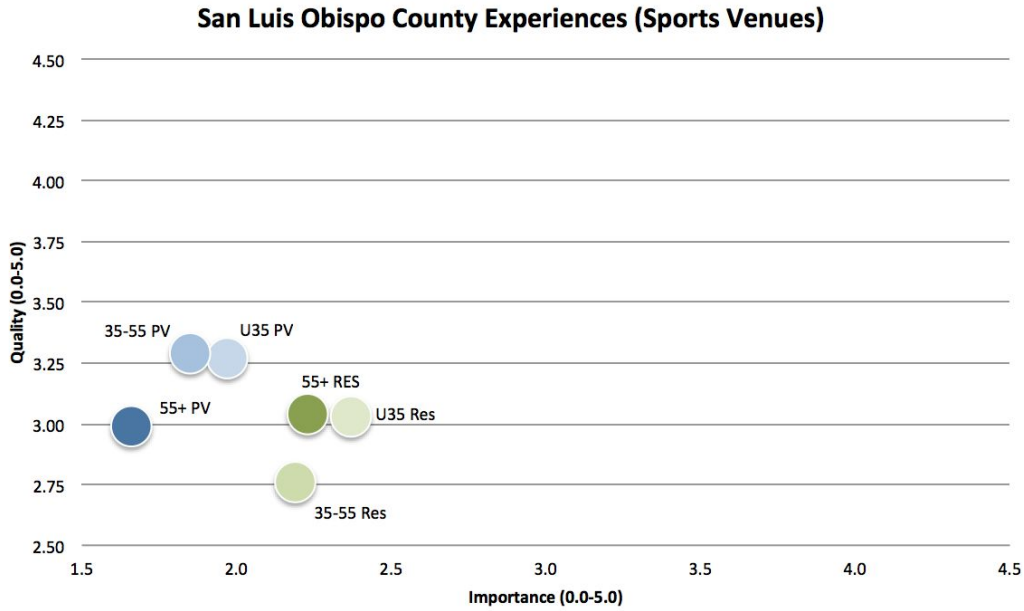


Residents of all ages definitely give more Importance to SLO County Sports Teams than Previous Visitors, but both are still low for Importance. For both Residents and Previous Visitors of all ages, the Quality of SLO County Sports Teams is rated low.

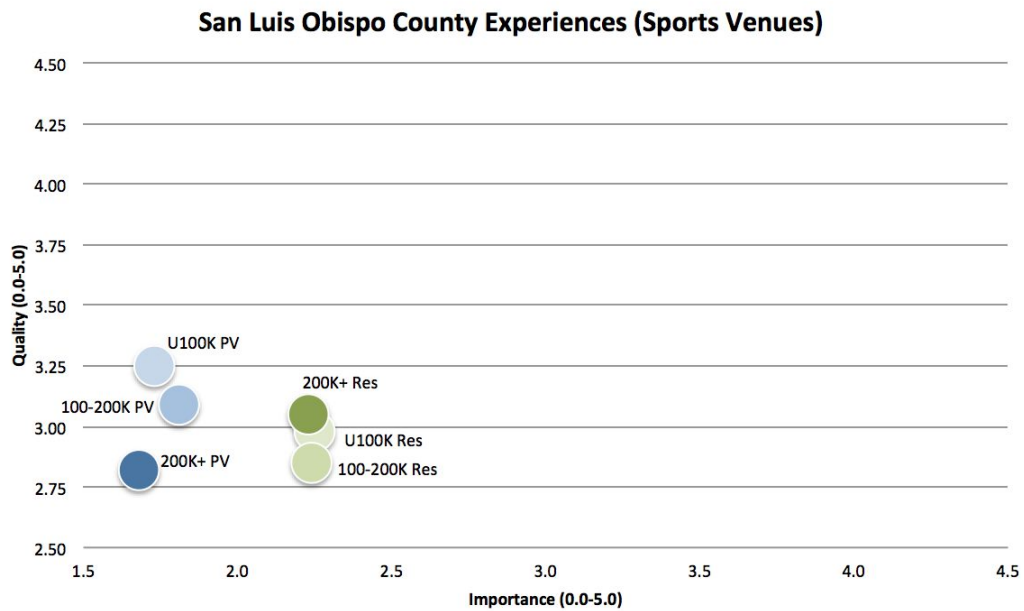


Residents of all incomes definitely give more Importance to SLO County Sports Teams than Previous Visitors, but both are still low for Importance. For both Residents and Previous Visitors of all incomes, the Quality of SLO County Sports Teams is rated low.



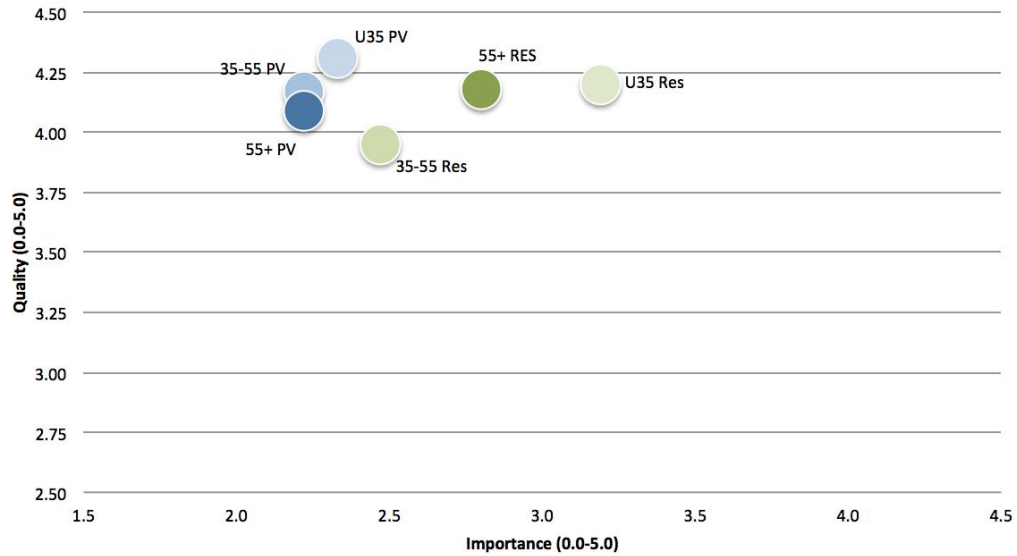


Consistent with the Sport Teams results, Sport Venues are also more important for Residents of all ages. Previous Visitors do give SLO County Sports Venues better marks for Quality than Residents. For both Residents and Previous Visitors of all ages, the Quality and Importance of SLO County Sports Venues are generally rated low.



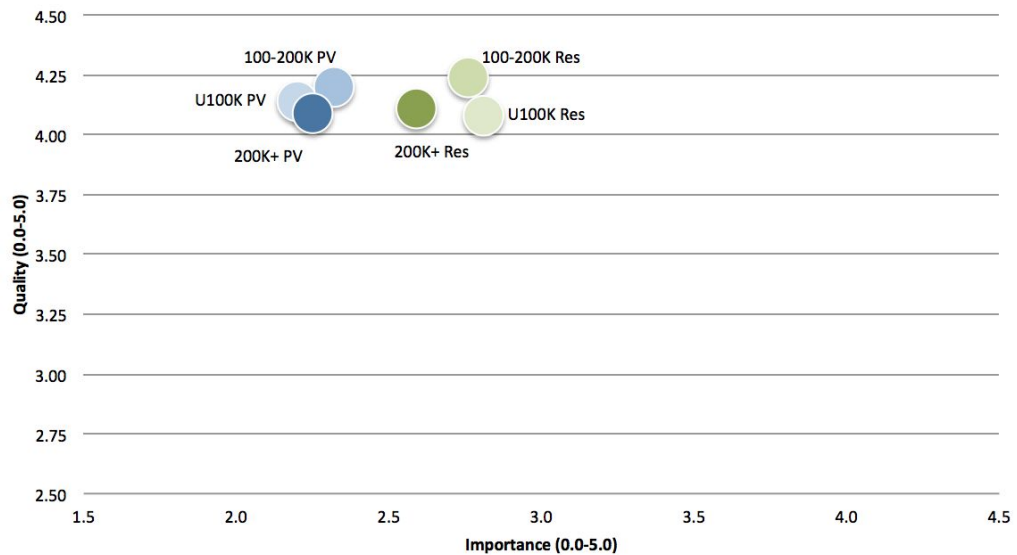
Sport Venues are more important for Residents of all incomes. For both Residents and Previous Visitors of all incomes, the Quality and Importance of SLO County Sports Venues are generally rated low.

### San Luis Obispo County Experiences (Colleges and Universities)



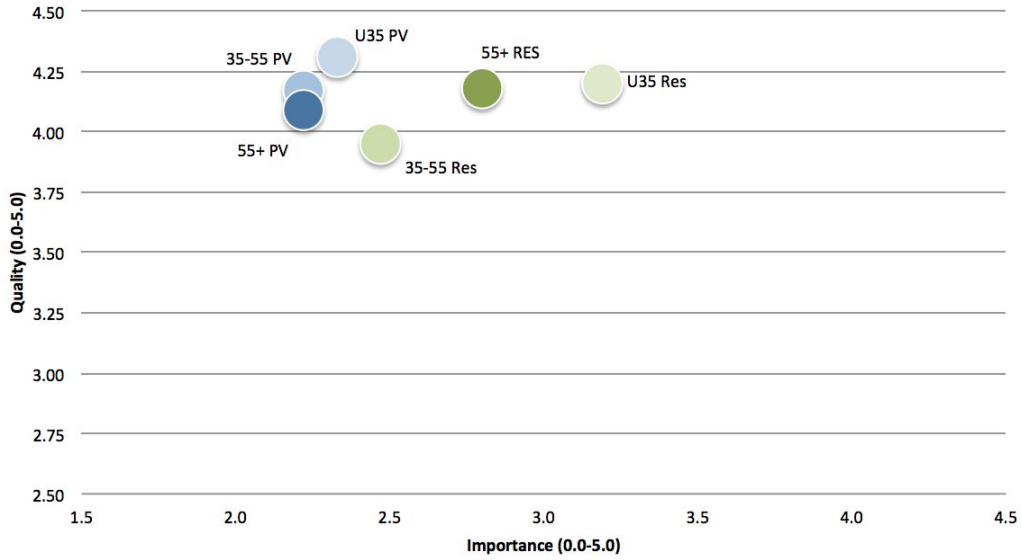
For Residents and Previous Visitors, the Quality of SLO County Colleges and Universities is rated high, with Residents rating the Importance slightly higher than Previous Visitors. Residents under 35 years old (U35 Res) rate the Importance of SLO County Colleges and Universities the highest.

### San Luis Obispo County Experiences (Colleges and Universities)



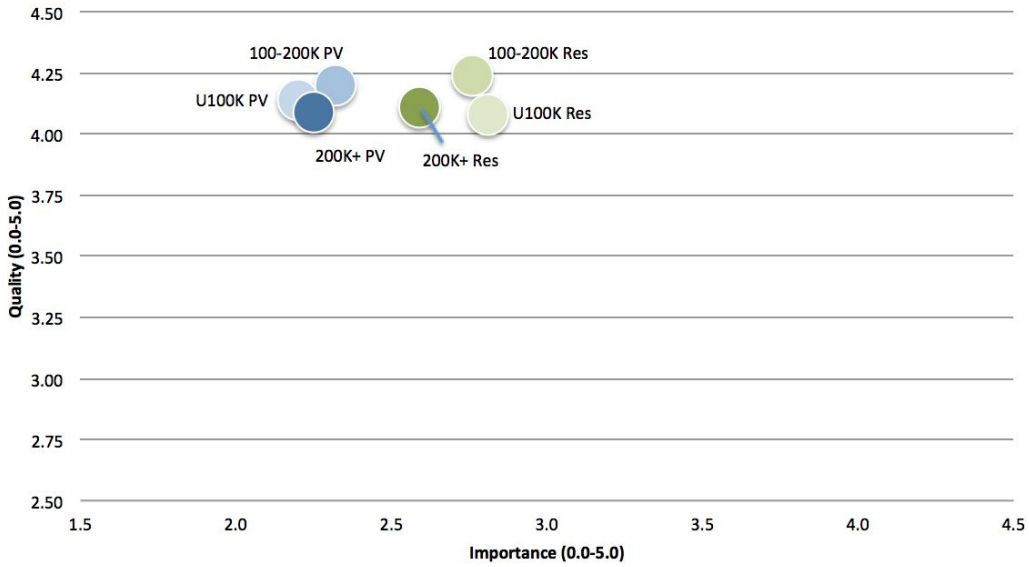
For Residents and Previous Visitors, there is very little differentiation between income groups on the Quality and Importance of SLO County Colleges and Universities.

### San Luis Obispo County Experiences (Bed & Breakfasts)



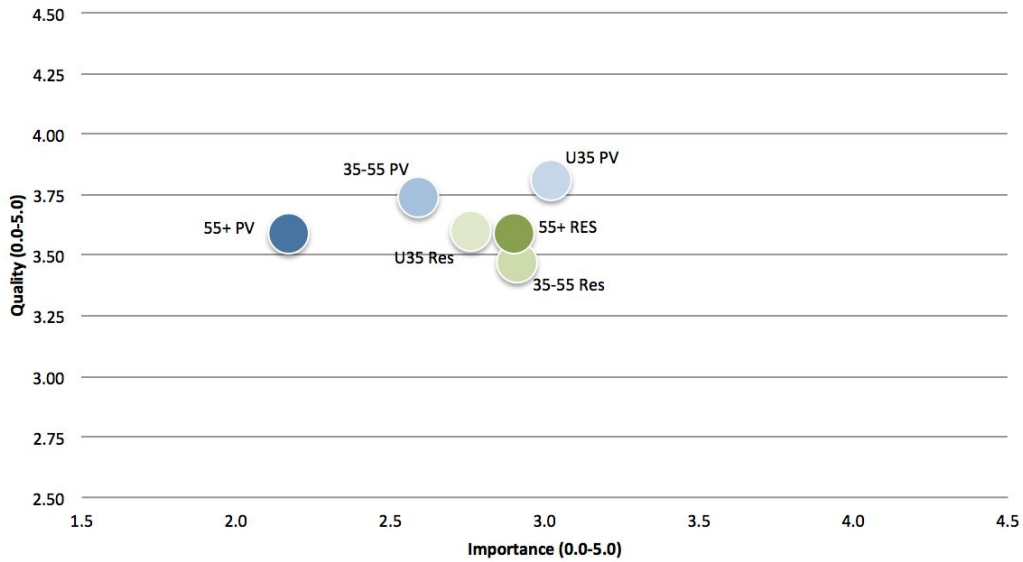
Surprisingly, Residents rated SLO County Bed & Breakfasts more Important than Previous Visitors of all ages. The rating of Quality is about the same for all groups.

### San Luis Obispo County Experiences (Bed & Breakfasts)



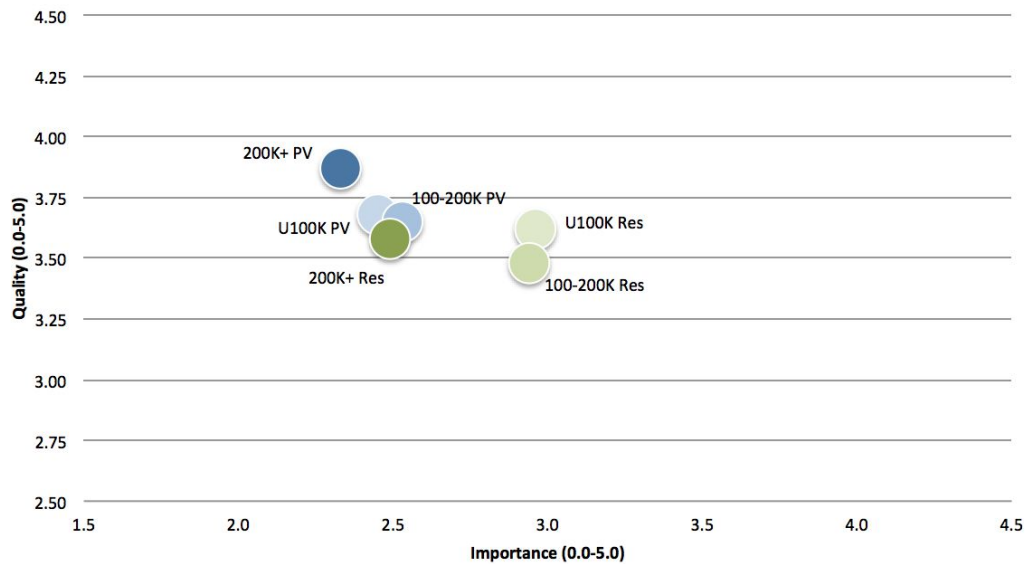
For Residents and Previous Visitors, there is very little differentiation between income groups on the Quality and Importance of SLO County Bed & Breakfasts.

### San Luis Obispo County Experiences (RV Parks and Campgrounds)



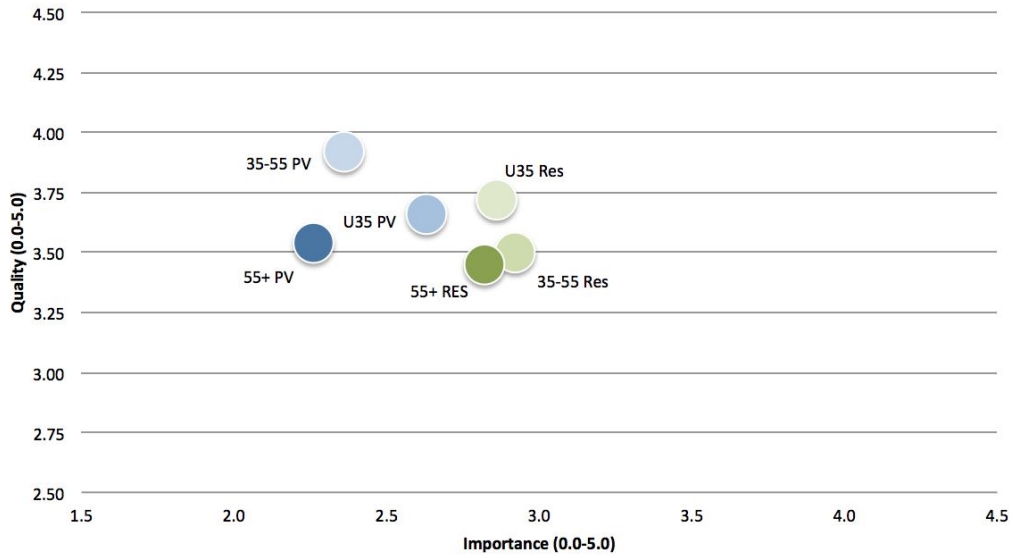
Under 35 year old Previous Visitors rate SLO County RV Parks and Campgrounds highest for Importance and Quality. Residents also report this category as moderate Importance, but give slightly lower Quality scores than Previous Visitors. Previous Visitors 35-55 years old and 55+ years old rate this category lower Importance.

### San Luis Obispo County Experiences (RV Parks and Campgrounds)



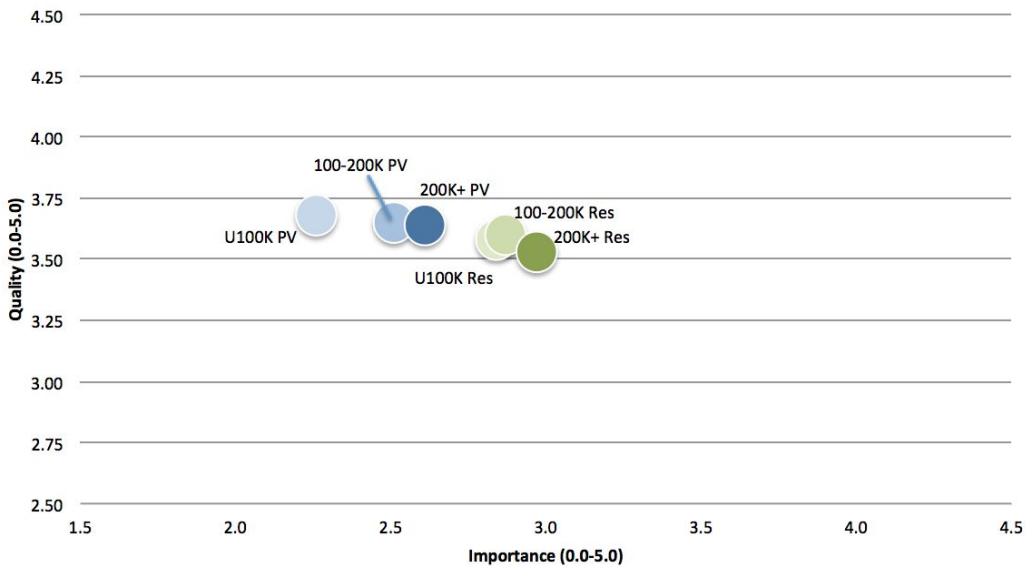
Residents of all income groups rate SLO County RV Parks and Campgrounds highest for Importance, while the highest income group of Previous Visitors (200k+) rate them highest for Quality.

### San Luis Obispo County Experiences (Spas and Wellness)

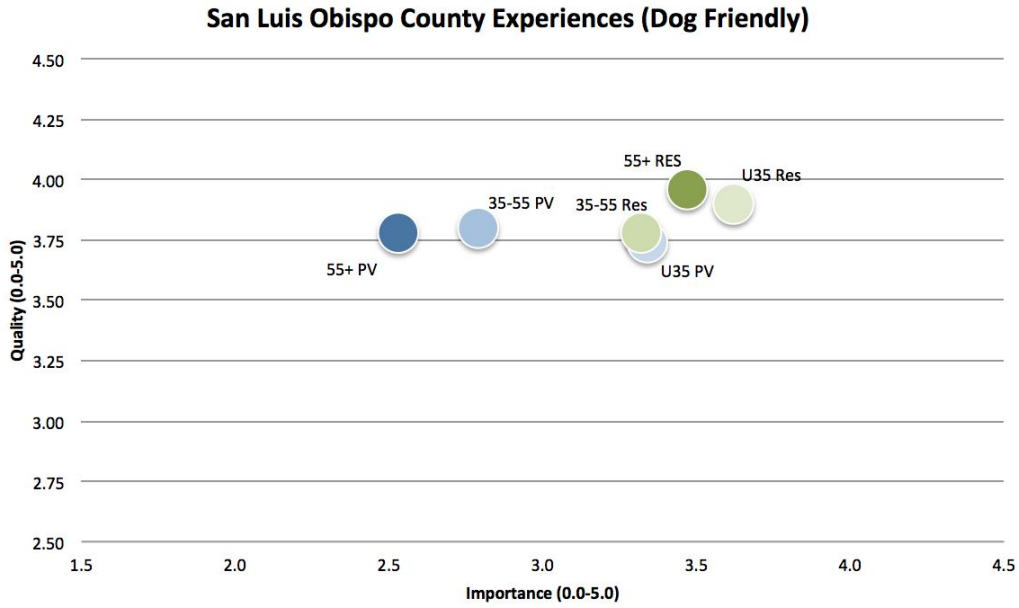


Spas and Wellness is more important for Residents of all ages than Previous Visitors of all ages. Middle aged (35-55 years old) Previous Visitors give the highest Quality score for SLO County Spas and Wellness.

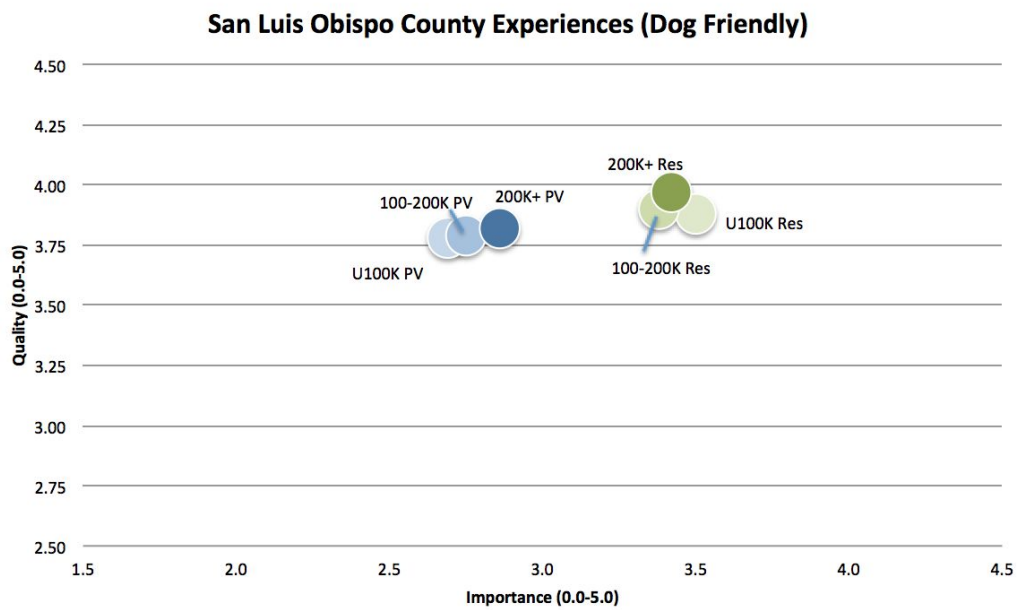
### San Luis Obispo County Experiences (Spas and Wellness)



Spas and Wellness is more important for Residents of all income groups than Previous Visitors of all income groups.

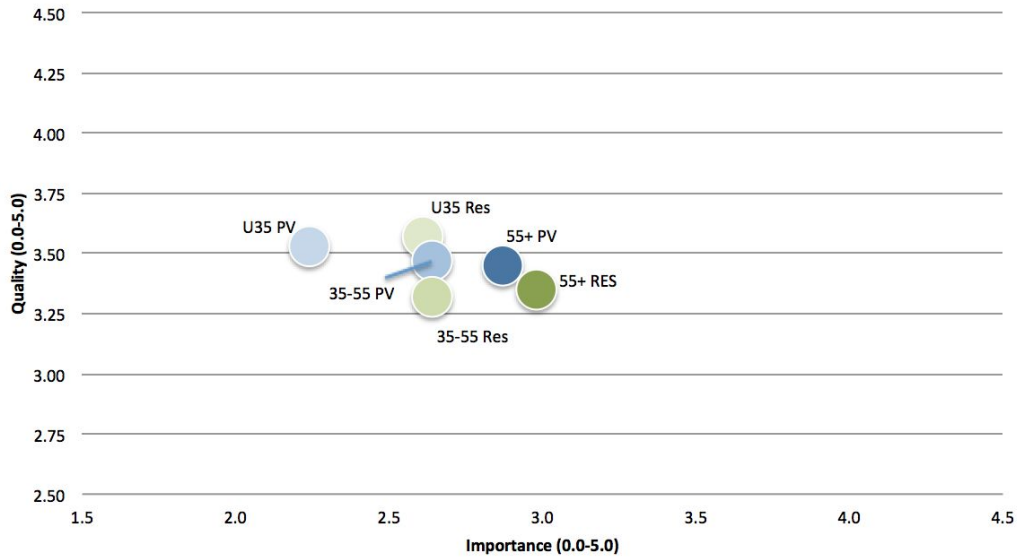


Residents of all ages score Dog Friendly as more important than Previous Visitors. The Quality scores are about the same for all groups.



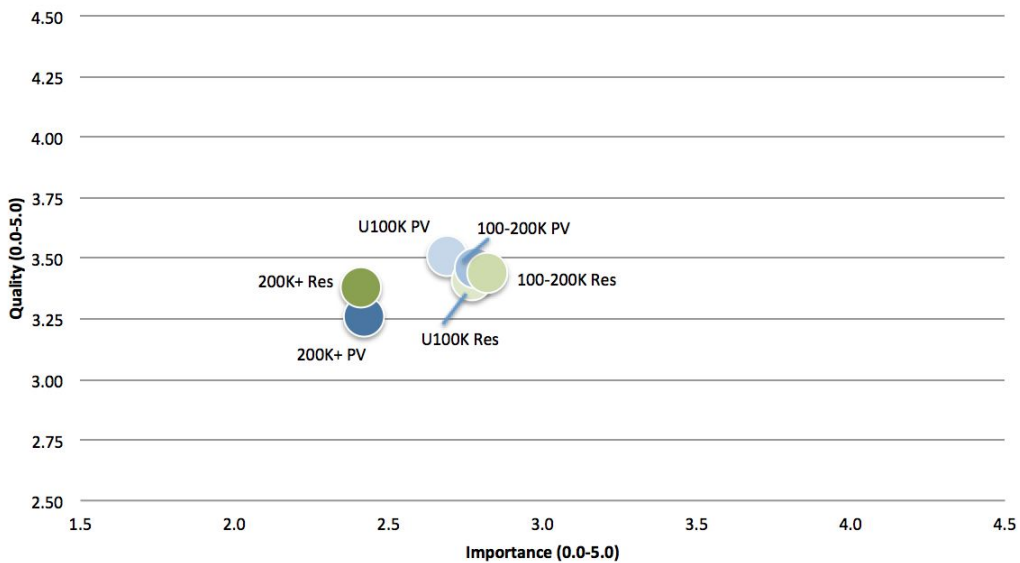
Residents of all incomes score Dog Friendly as more important than Previous Visitors of all incomes.

### San Luis Obispo County Experiences (Visitor Centers)



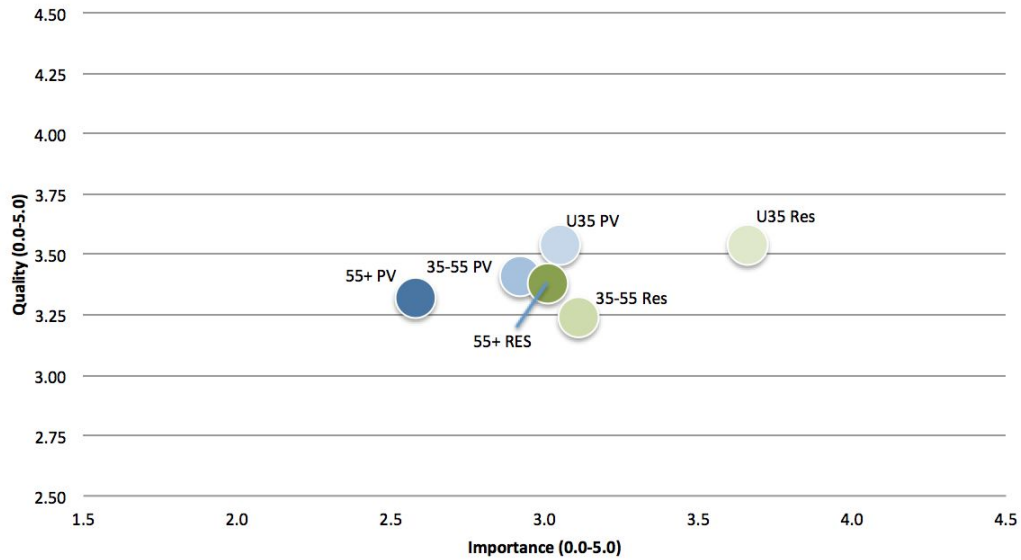
Both Residents and Previous Visitors older than 55 years old, give SLO County Visitor Centers a higher score for Importance than other age groups. Those under 35 years old give a lower score for Importance than other age groups.

### San Luis Obispo County Experiences (Visitor Centers)



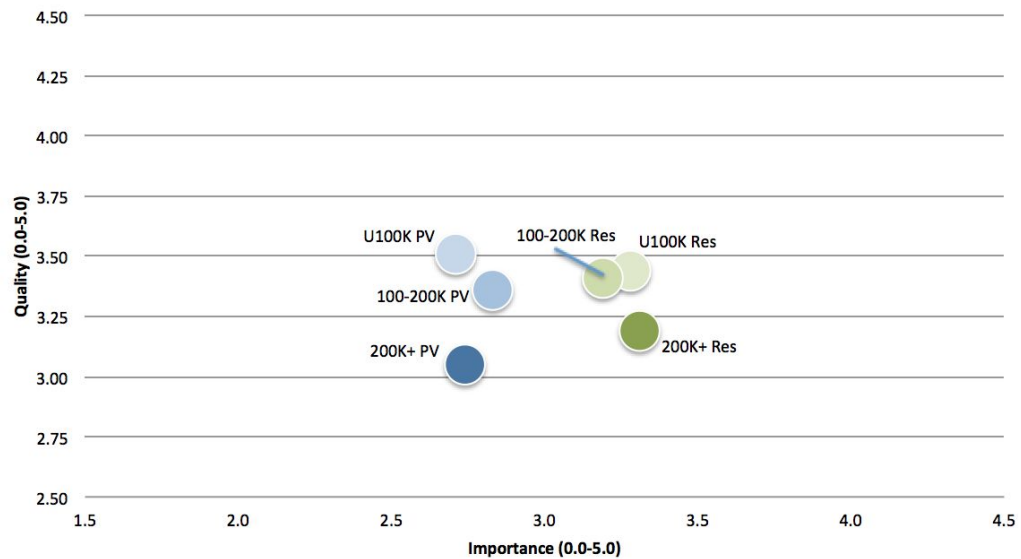
The more affluent income group (200K+) of Residents and Previous Visitors rate SLO County Visitor Centers as less important than all other income groups.

### San Luis Obispo County Experiences (Nightlife)



Residents under 35 years old score the Importance of SLO County Nightlife the highest, while 55+ Previous Visitors score Nightlife the lowest. Generally speaking Previous Visitors see Nightlife as less important than the same age group of Residents.

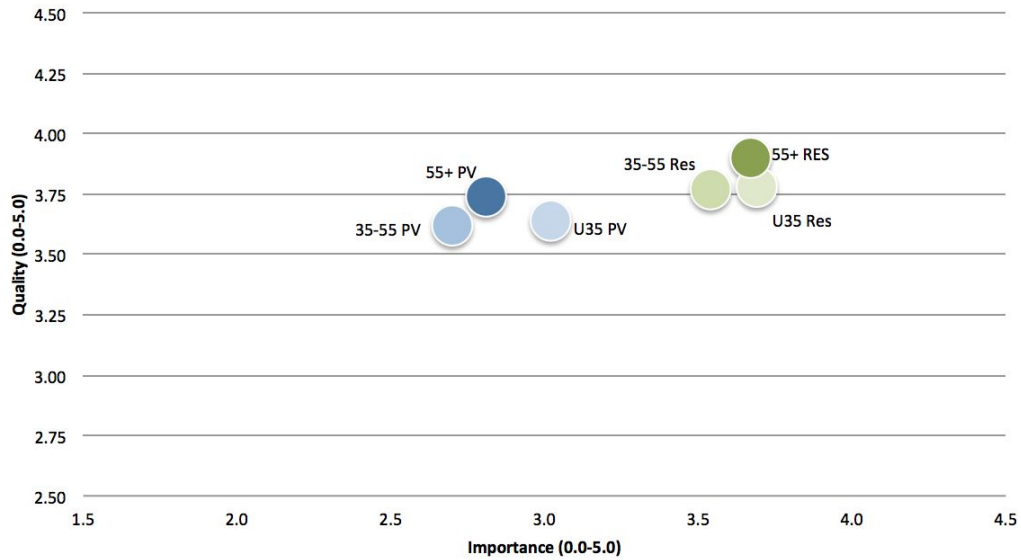
### San Luis Obispo County Experiences (Nightlife)



The more affluent income group (200K+) of Residents and Previous Visitors rate SLO County Nightlife as lower Quality than all other income groups.

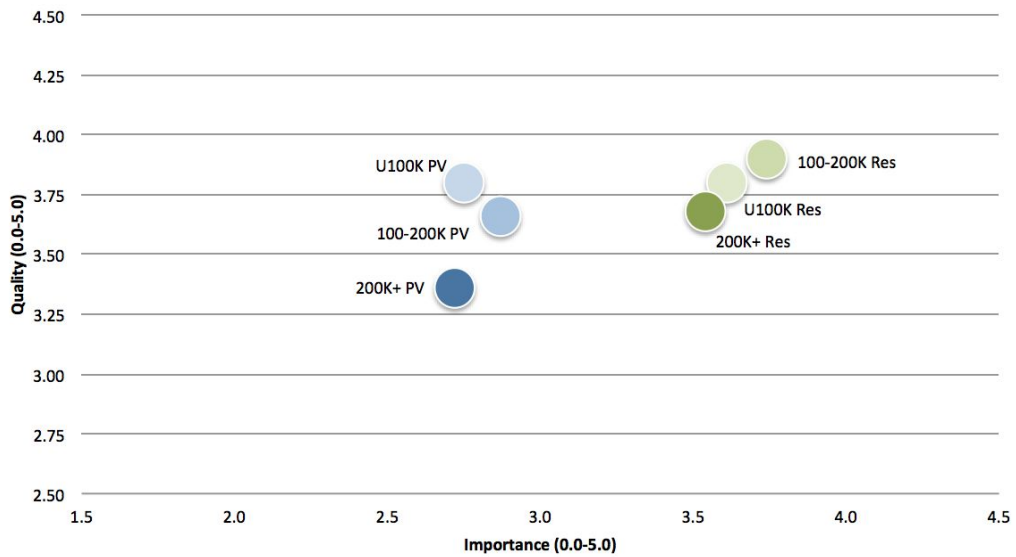


### San Luis Obispo County Experiences (Concerts and Shows)



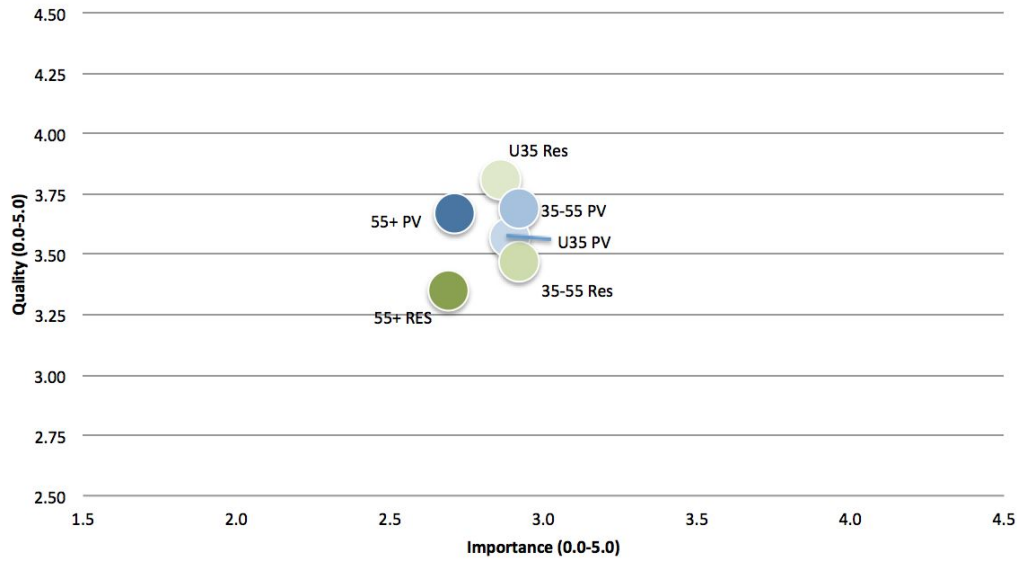
Residents of all ages rate SLO County Concerts and Shows as a higher Importance than all ages of Previous Visitors. They also rate them for Quality higher.

### San Luis Obispo County Experiences (Concerts and Shows)



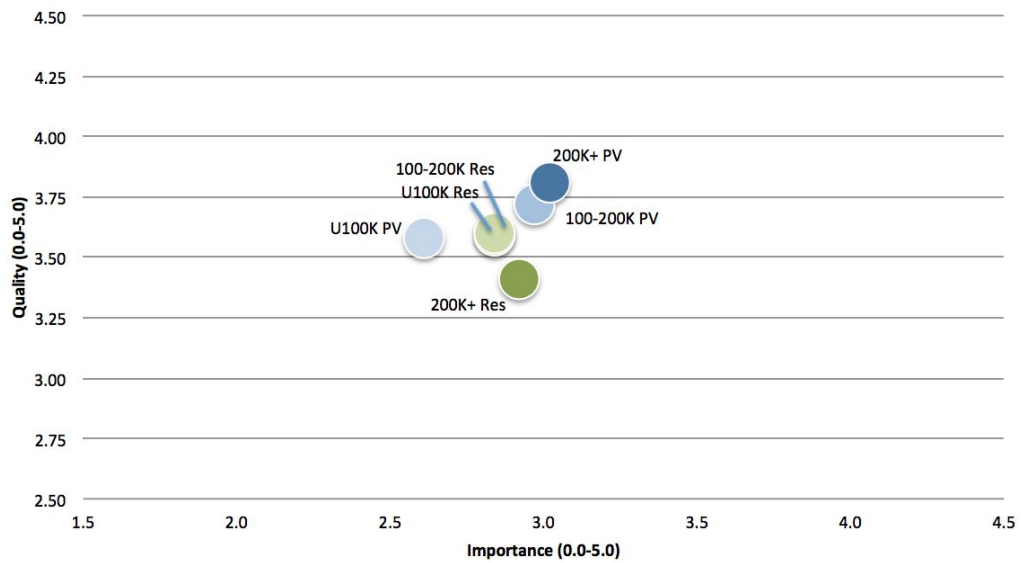
The more affluent income group (200K+) of Residents and Previous Visitors rate SLO County Concerts and Shows as lower Quality than all other income groups.

### San Luis Obispo County Experiences (Vacation Rentals)



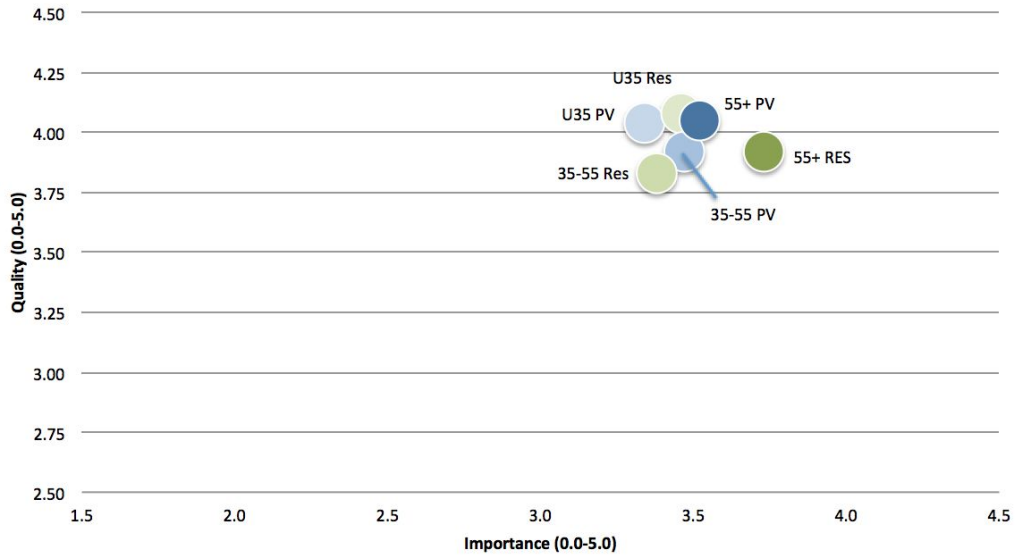
Residents and Previous Visitors who are 55+ year olds rate Vacation Rentals the lowest Importance by a small margin.

### San Luis Obispo County Experiences (Vacation Rentals)



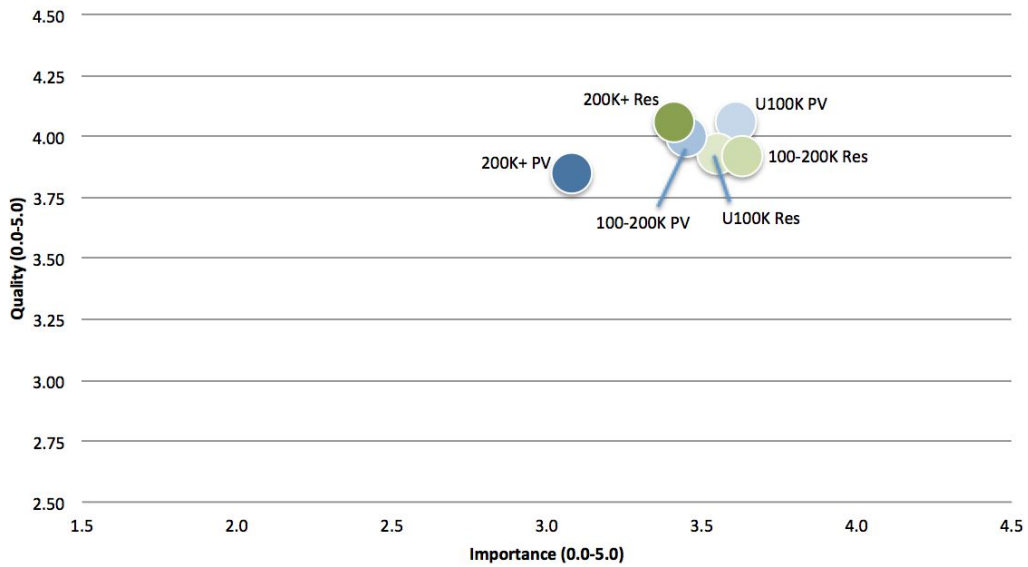
Residents and Previous Visitors who are more affluent (200k+) rate Vacation Rentals the highest Importance by a small margin.

### San Luis Obispo County Experiences (Highway 1)



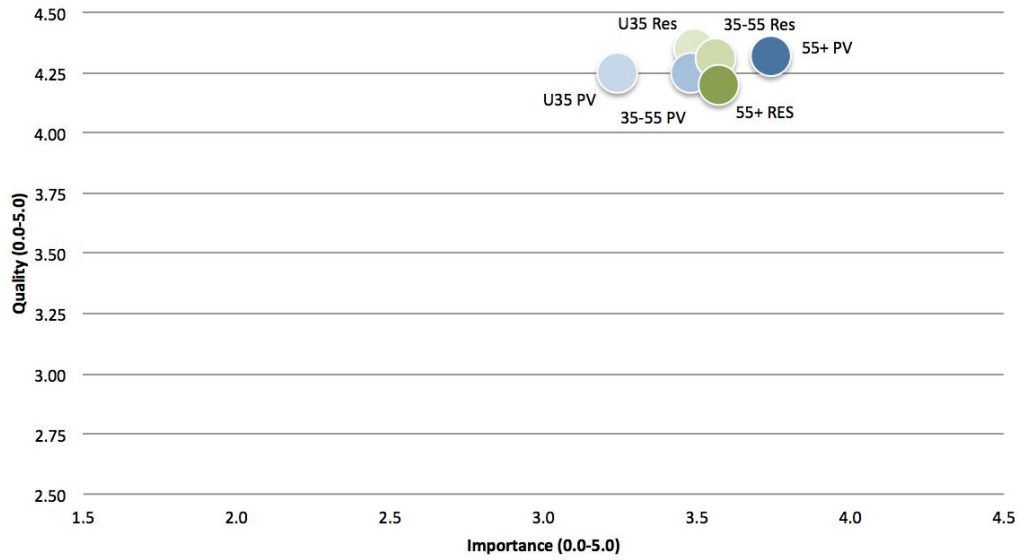
All age groups for Residents and Previous Visitors score Highway 1 high Quality and high Importance.

### San Luis Obispo County Experiences (Highway 1)



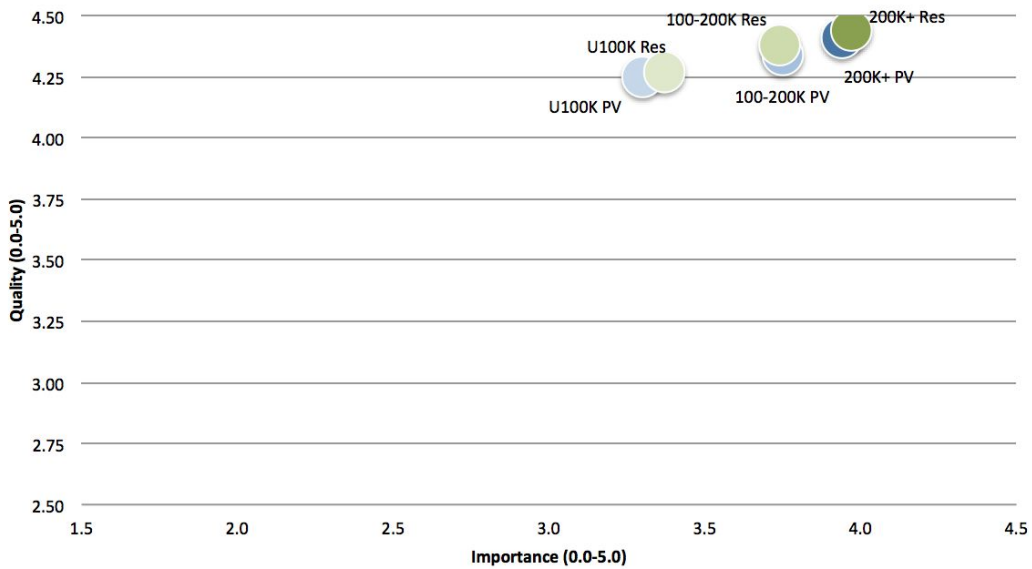
Residents and Previous Visitors who are more affluent (200k+) rate Highway 1 the lowest Importance.

### San Luis Obispo County Experiences (Wine Country)



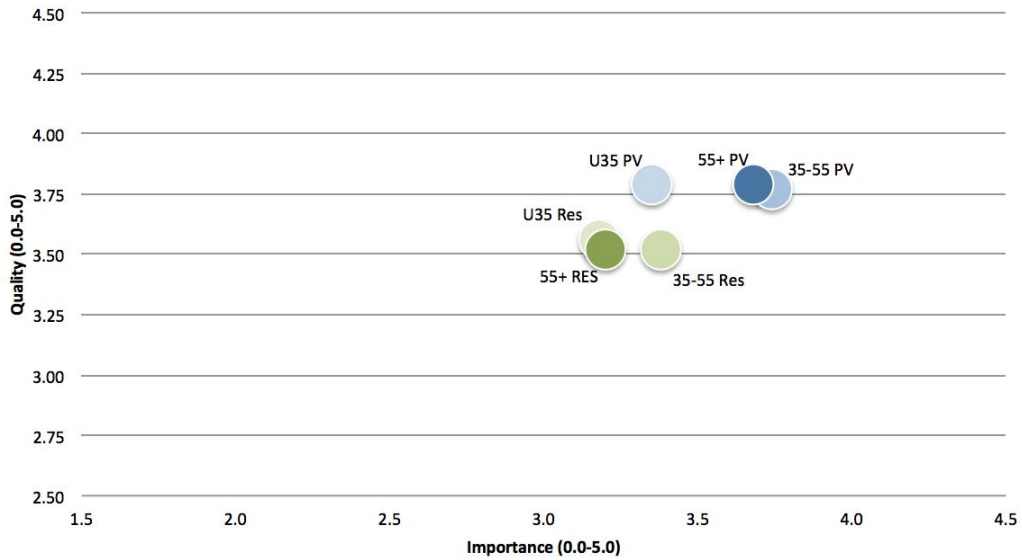
All age groups for Residents and Previous Visitors score Wine Country high Quality and high Importance. Previous Visitors under 35 years old rate Wine Country as less important than other age groups, while 55+ year old Previous Visitors rate Wine Country as more important than other age groups.

### San Luis Obispo County Experiences (Wine Country)



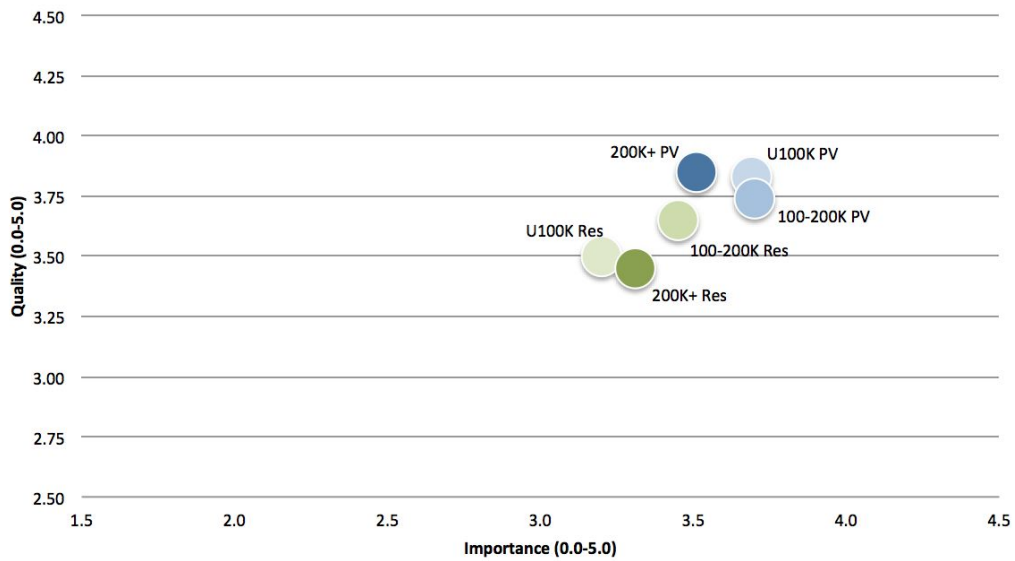
Residents and Previous Visitors who are more affluent (200k+) rate Wine Country the highest Importance.

### San Luis Obispo County Experiences (Hotels and Motels)



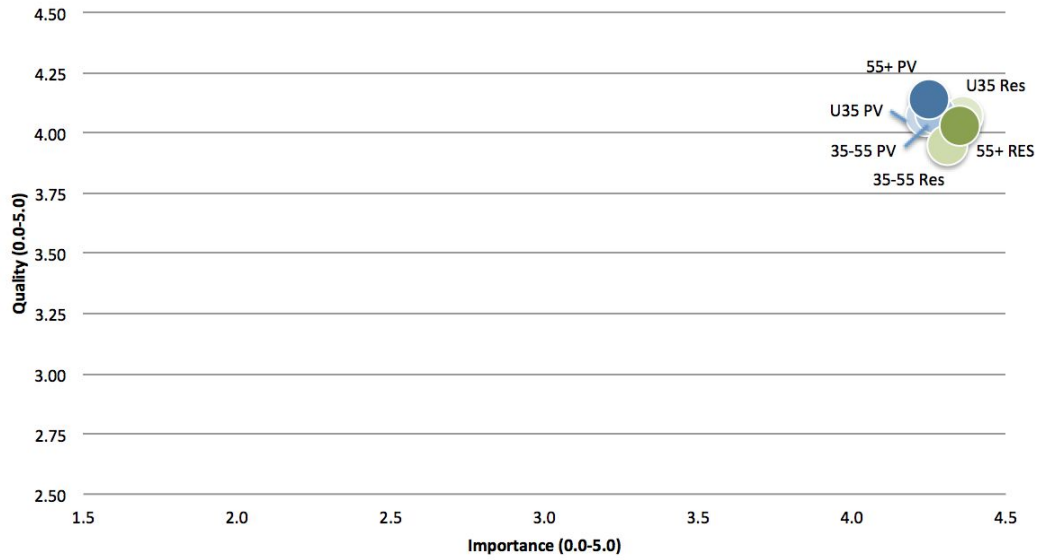
Previous Visitors assign higher Importance in all age groups to Hotels and Motels than Residents. They also assign higher Quality.

### San Luis Obispo County Experiences (Hotels and Motels)



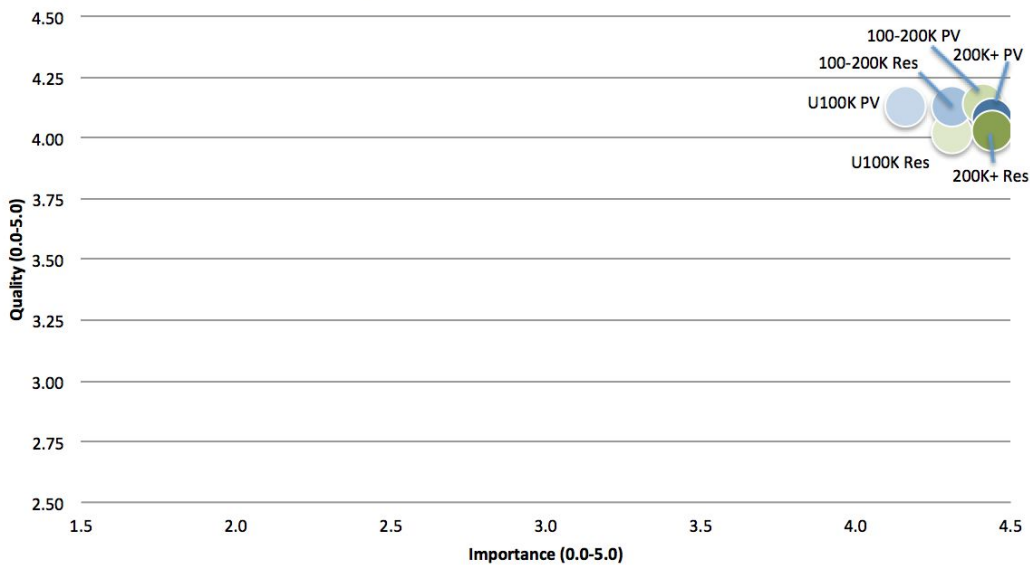
Previous Visitors assign higher Importance in all income groups to Hotels and Motels than Residents. They also assign higher Quality.

### San Luis Obispo County Experiences (Restaurants)



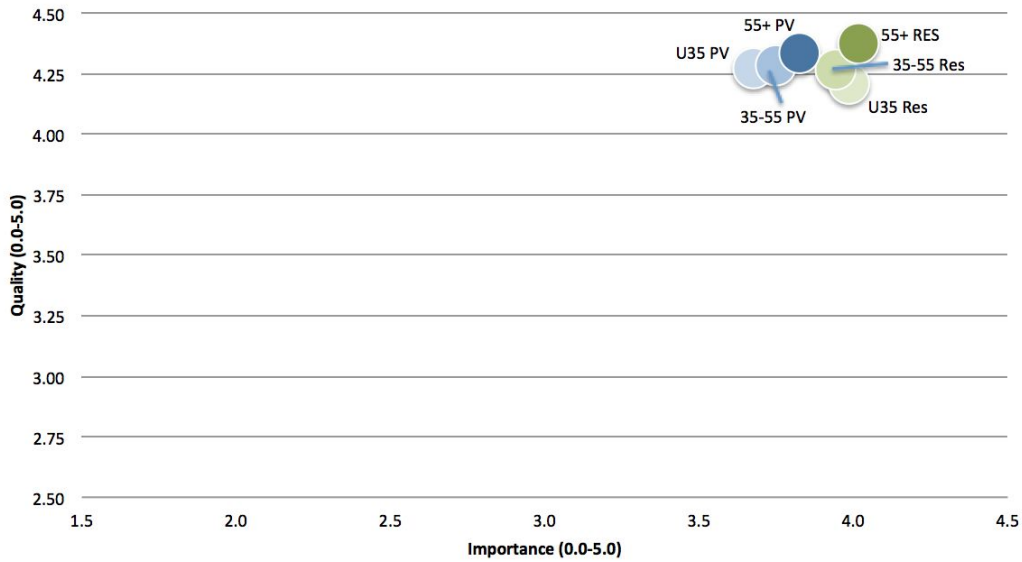
There is strong consistency between all age groups of Residents and Previous Visitors for the high Importance and high Quality of SLO County Restaurants.

### San Luis Obispo County Experiences (Restaurants)



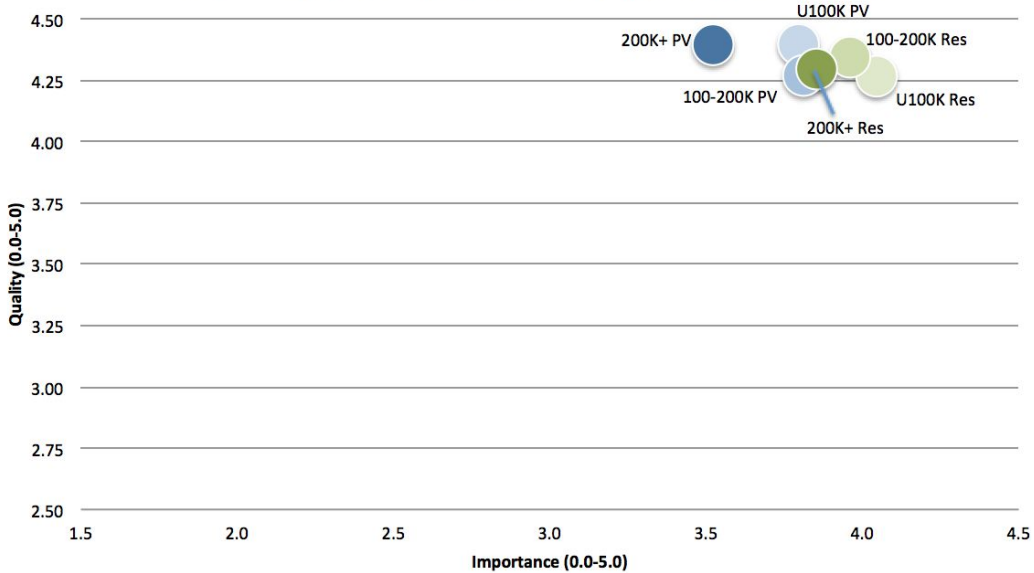
Residents and Previous Visitors who are more affluent (200k+) rate SLO County Restaurants the highest Importance.

### San Luis Obispo County Experiences (Sights and Landmarks)



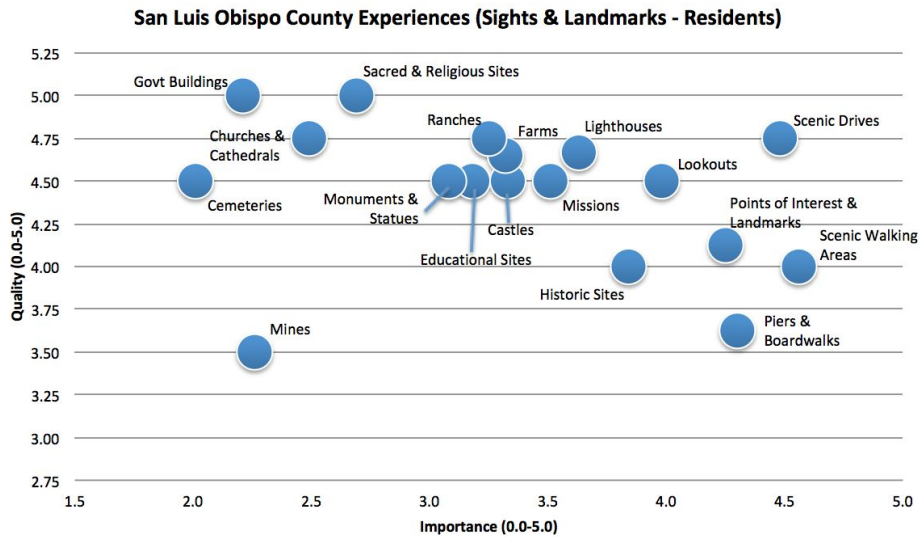
The scores for Quality of SLO County Sights and Landmarks are very much the same for all ages and Previous Visitor and Residents (high Quality), but Residents of all ages score the category higher in Importance.

### San Luis Obispo County Experiences (Sights and Landmarks)

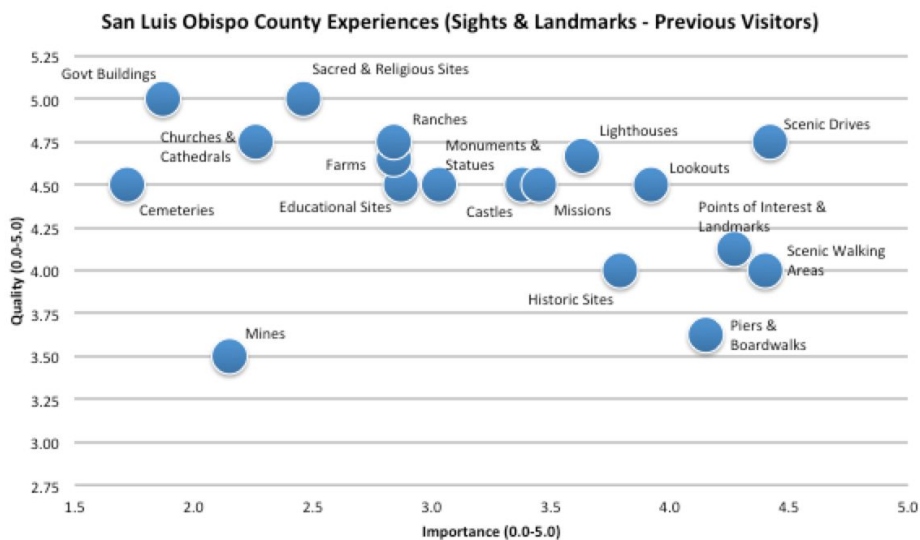


Residents and Previous Visitors who are more affluent (200k+) rate SLO County Sights and Landmarks the lowest Importance.

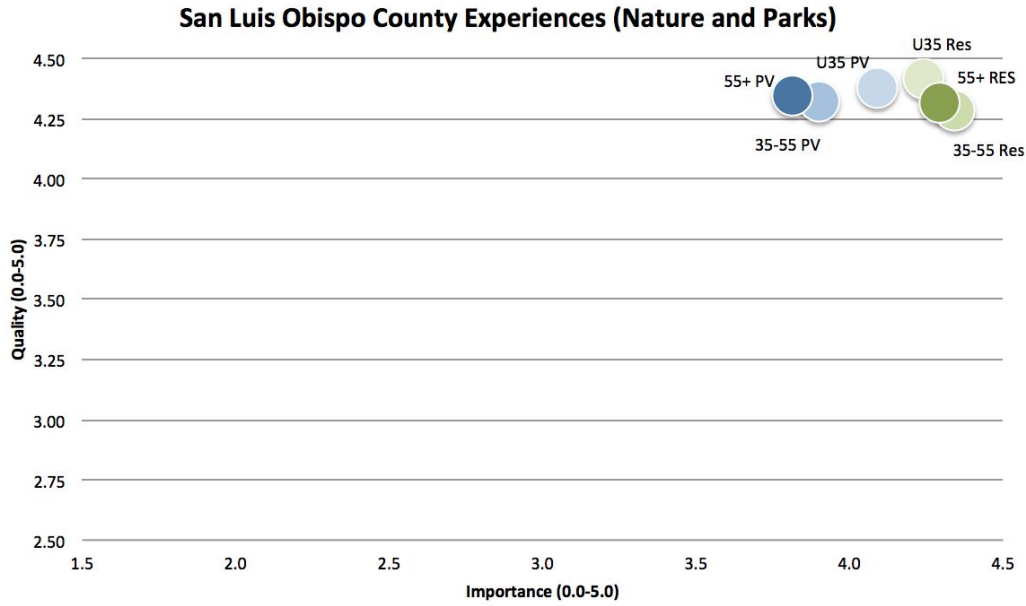
When the components of Sights & Landmarks are broken down into their individual parts (see below), Residents (N=341) rate Scenic Drives, Scenic Walking Areas, Piers & Boardwalks and Points of Interest & Landmarks the most Important within the category. The Quality scores have been collected from TripAdvisor, which may include Quality scores by Residents and Previous Visitors. TripAdvisor rates Govt Buildings and Sacred & Religious Sites as the highest Quality experiences, while Mines and Piers & Boardwalks are rated as the lowest Quality experiences.



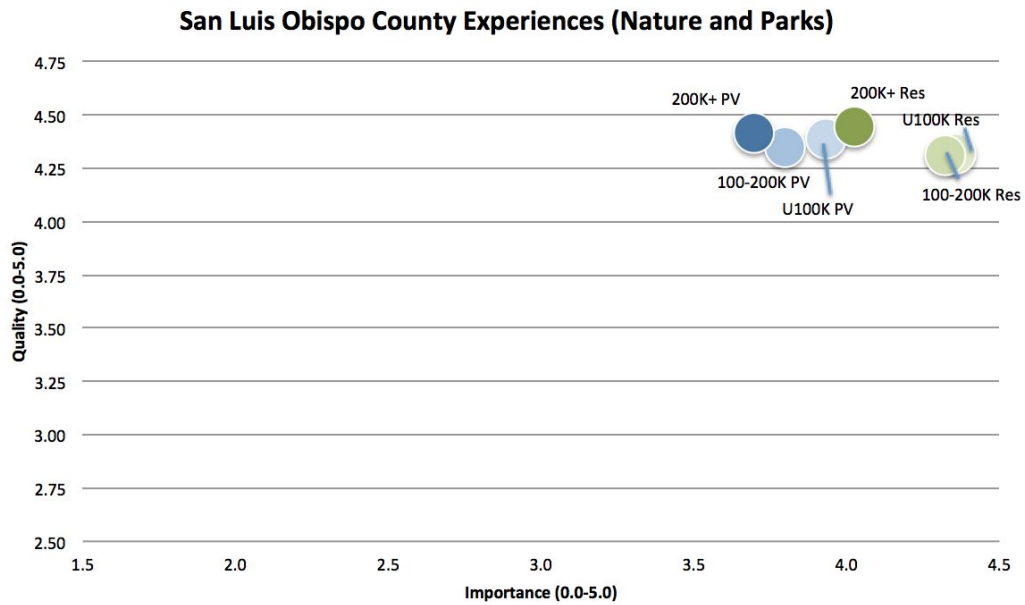
The following chart shows this same breakdown of Sights & Landmark components with Importance scoring by Previous Visitors (N=588) and Quality scoring by TripAdvisor. The same four components as Residents, rate highest for Previous Visitor Importance.



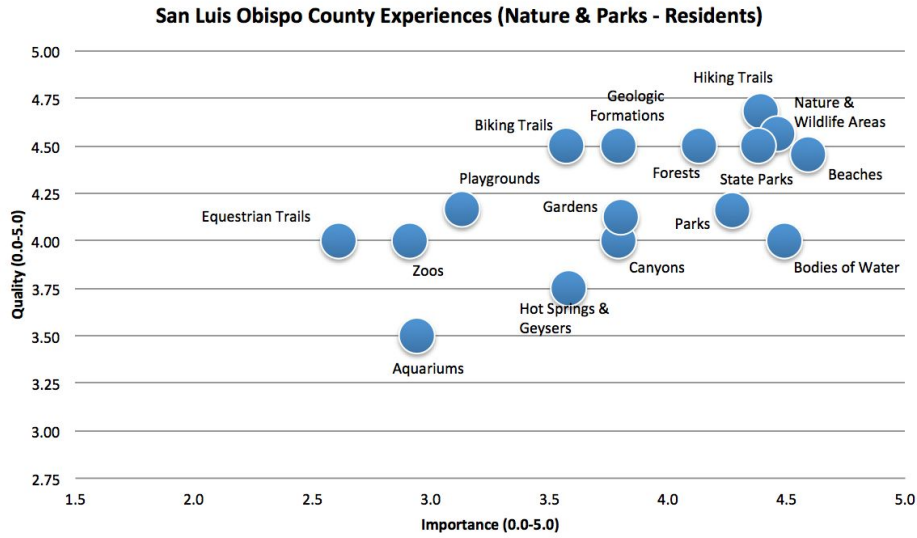




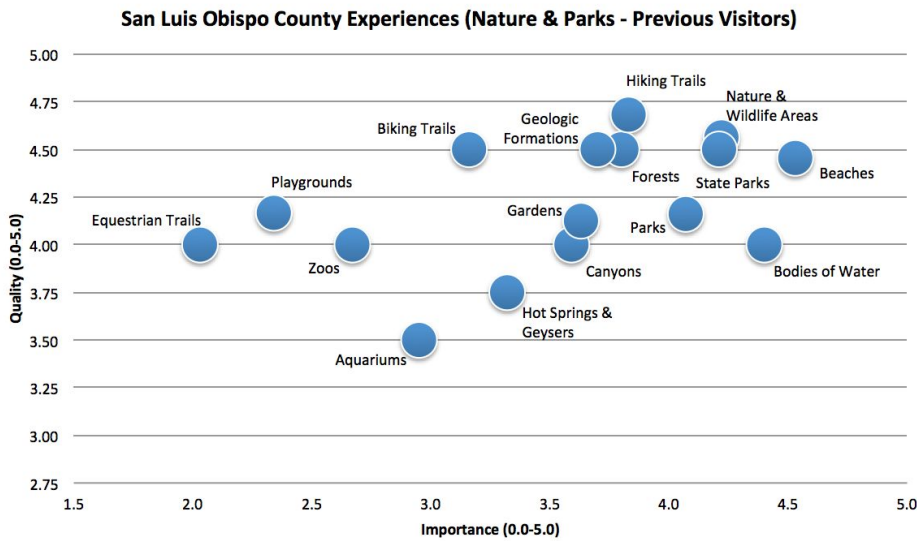
Nature and Parks scores are very similar to Sights and Landmarks, with Residents of all ages scoring the category higher for Importance, but similar for Quality vis-a-vis Previous Visitors.



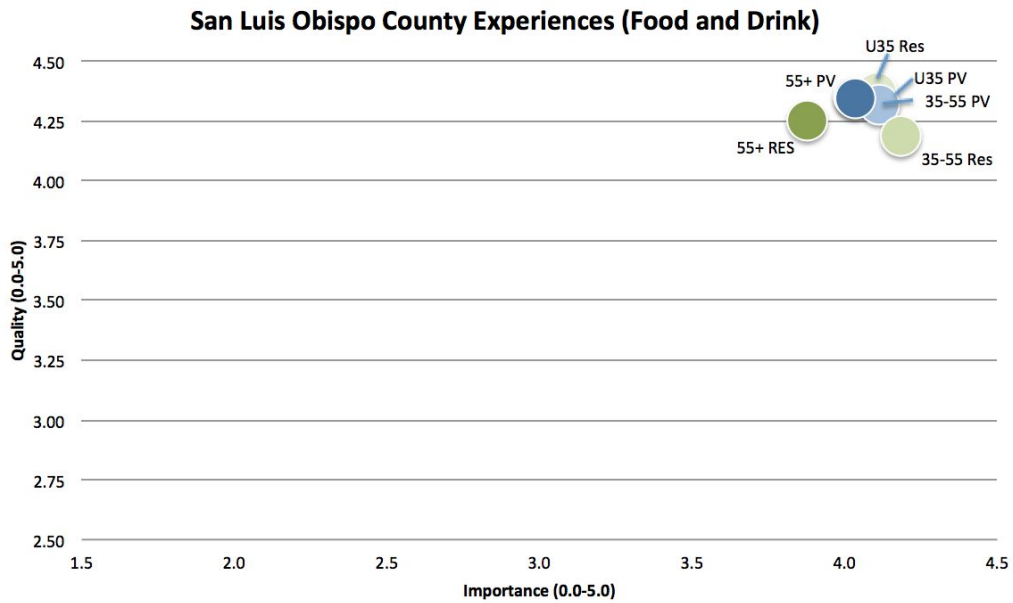
Residents and Previous Visitors who are more affluent (200k+) rate SLO County Nature and Parks the lowest Importance.



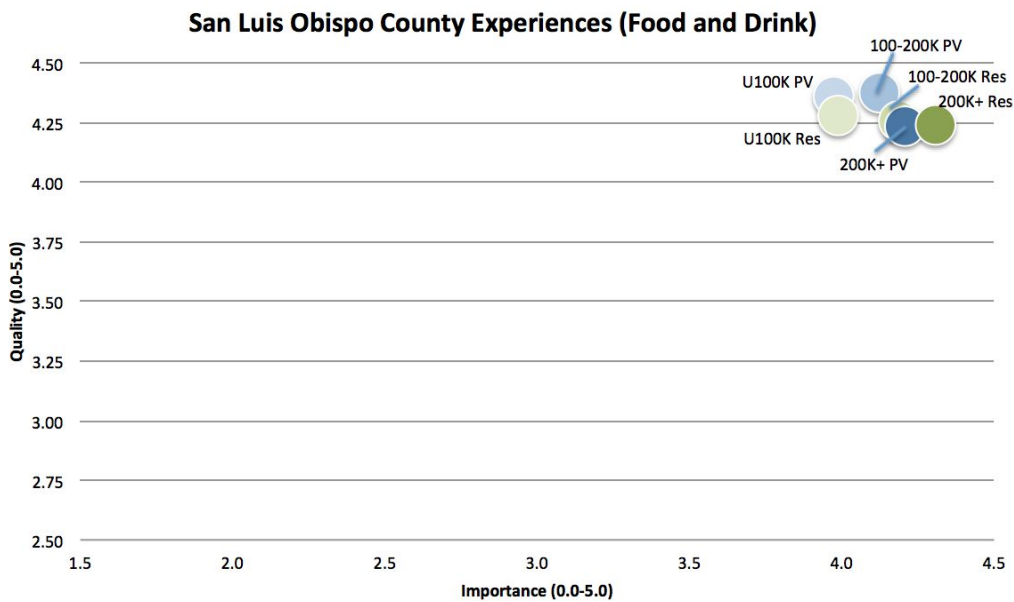
The component parts of Nature & Parks (see below) that score the highest Importance (right hand side) for Residents (N=391) are Beaches, Bodies of Water, Nature & Wildlife Areas, Hiking Trails, State Parks and Parks. The parts that score the highest for Quality (top side) are Hiking Trails, Biking Trails, Geologic Formations, Forests, State Parks, Nature and Wildlife Areas and Beaches. The parts that score the lowest for Quality (bottom) are Aquariums and Hot Springs & Geysers.



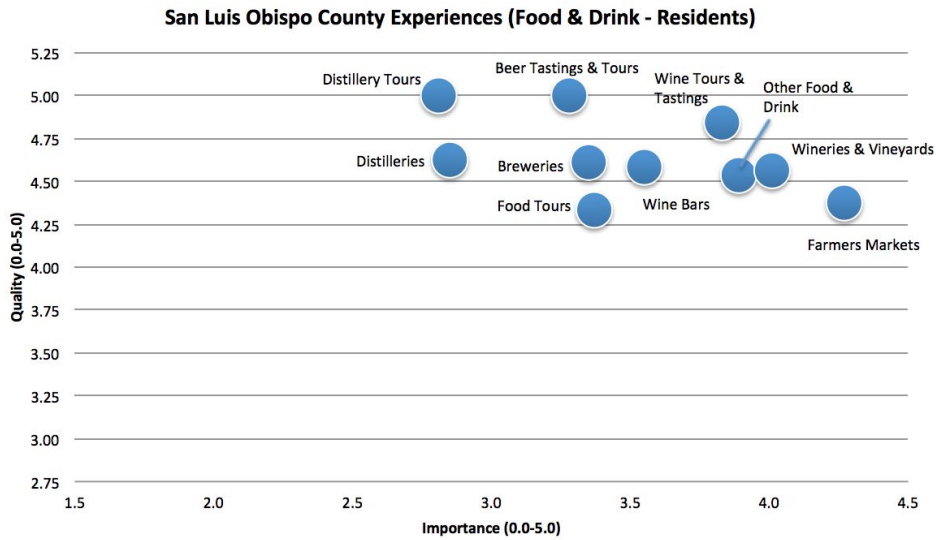
The component parts of Nature & Parks that score the highest Importance (right hand side) for Previous Visitors (N=619) are Beaches, Bodies of Water, Nature & Wildlife Areas, State Parks and Parks.



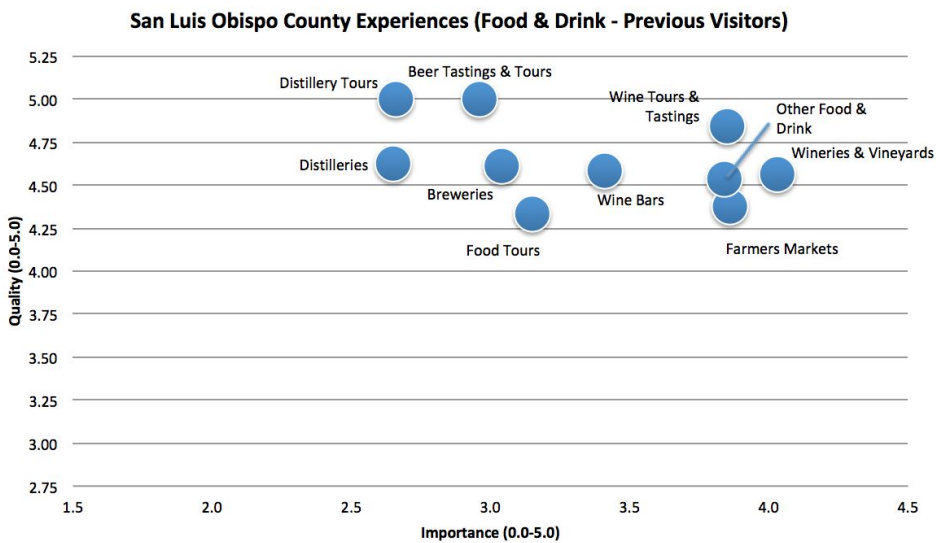
Residents 35-55 and 55+ years old score SLO County Food and Drink experiences slight lower in Quality than Previous Visitors. Even so, all groups score the SLO County Food and Drink experience high in Importance and high in Quality.



Residents and Previous Visitors who are more affluent (200k+) rate SLO County Food and Drink the highest Importance.

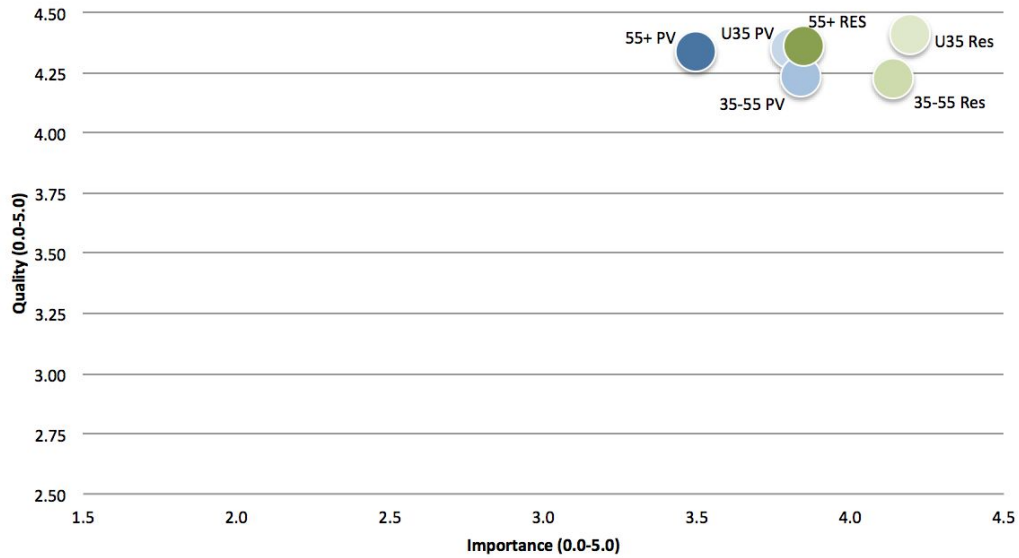


The most important components of Food and Drink experiences for Residents (N=337) are Farmers Markets, Wineries & Vineyards, Wine Tours & Tastings. The parts that score the highest for Quality are Distillery Tours and Beer Tastings & Tours, with Wine Tours and Tastings following closely in 3rd. Farmers Markets and Food Tours still scored well, but are the bottom of this category.



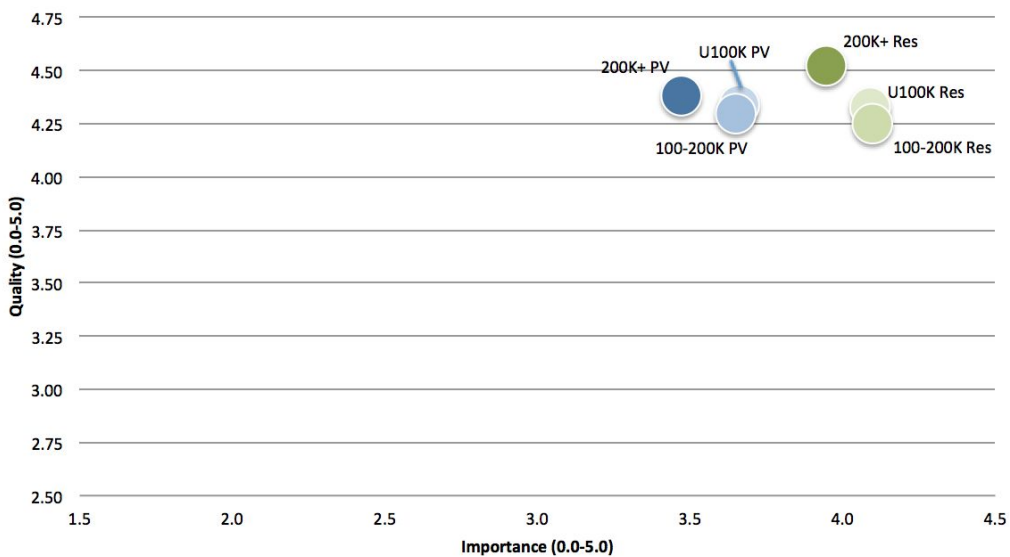
The results for Previous Visitors (N=676), component parts of Food & Drink, follow a similar order of Importance as the results for Residents.

### San Luis Obispo County Experiences (Outdoor Activities)

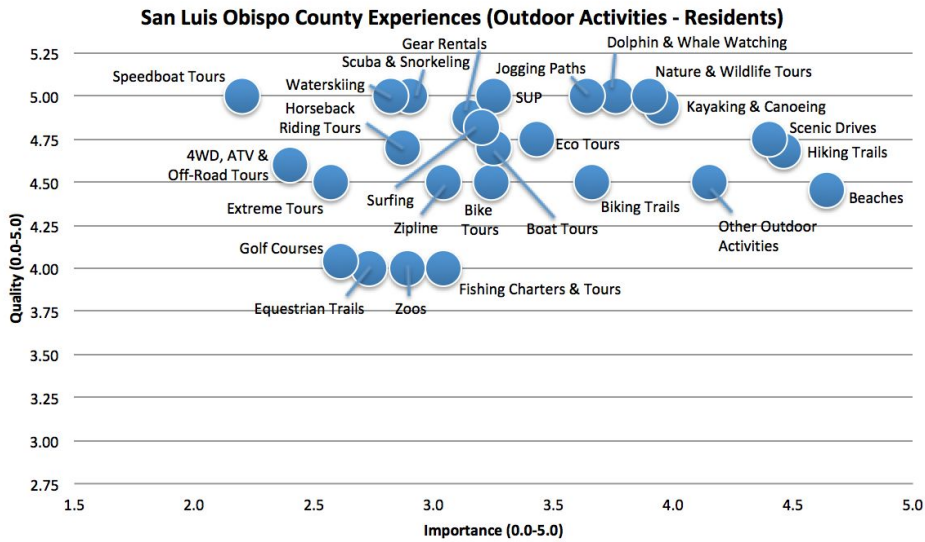


Residents under 55 years old score SLO County Outdoor Activities the highest for Importance, while 55+ years old Previous Visitors score it lowest for Importance. The Quality scores are all equally high.

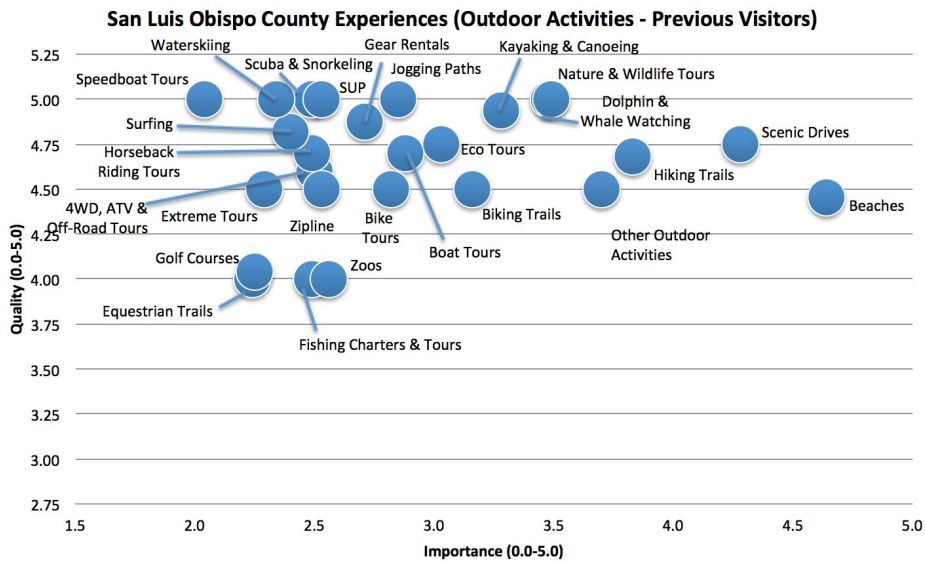
### San Luis Obispo County Experiences (Outdoor Activities)



Residents and Previous Visitors who are more affluent (200k+) rate SLO County Outdoor Activities the lowest Importance.

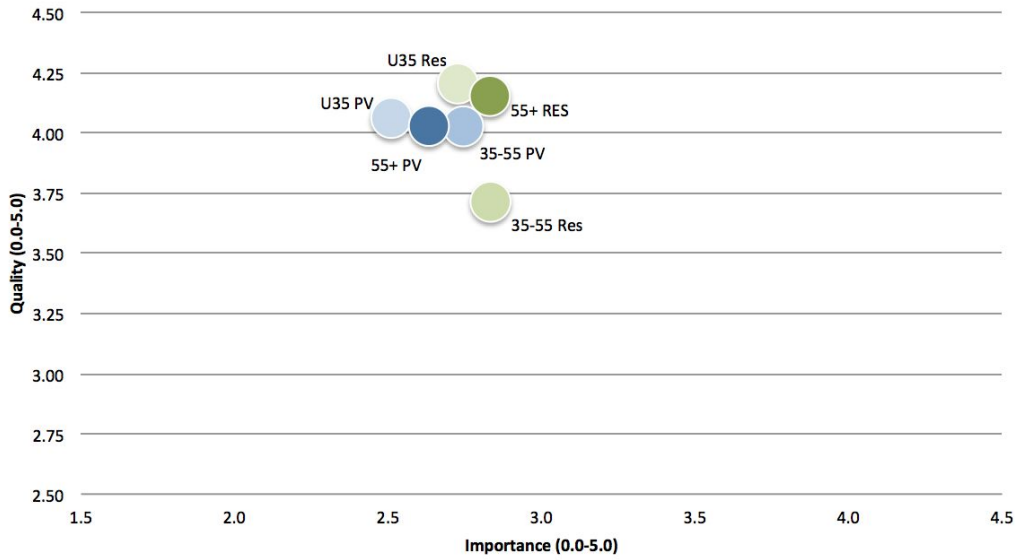


According to Residents (N=331), the most Important parts of Outdoor Activities are Beaches, Hiking Trails and Scenic Drives (right side). Seven individual parts score a perfect Quality score of 5.0, and four parts score the lowest on the Quality scale (Golf Courses, Equestrian Trails, Zoos and Fishing Charters).



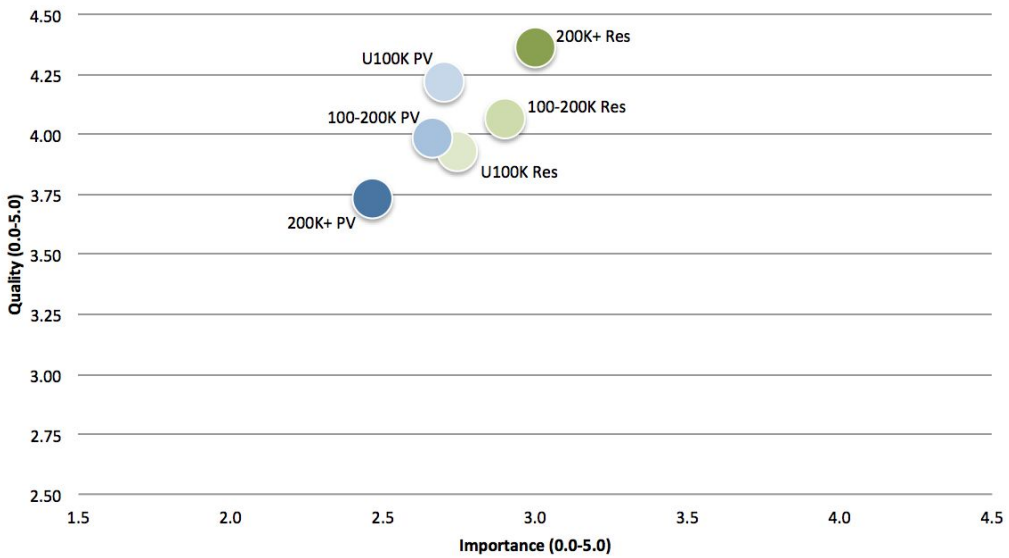
The same results are true for Previous Visitors (N=508). See above.

### San Luis Obispo County Experiences (Tours)

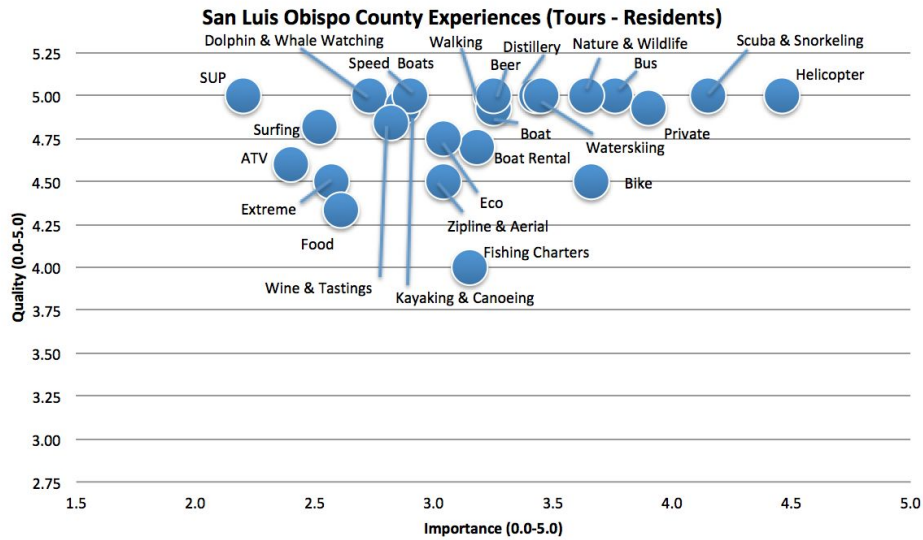


All groups generally score SLO County Tours the same for Importance, but 35-55 year old Residents, give Tours the lowest score for Quality.

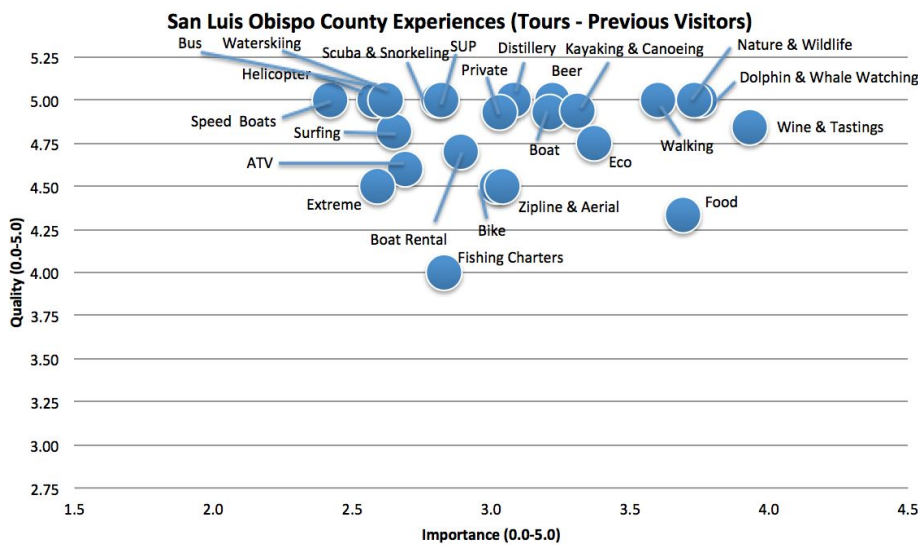
### San Luis Obispo County Experiences (Tours)



It is interesting to note that affluent Residents (200k+) rate SLO County Tours highest, while affluent Previous Visitors rate SLO County Tours the lowest.



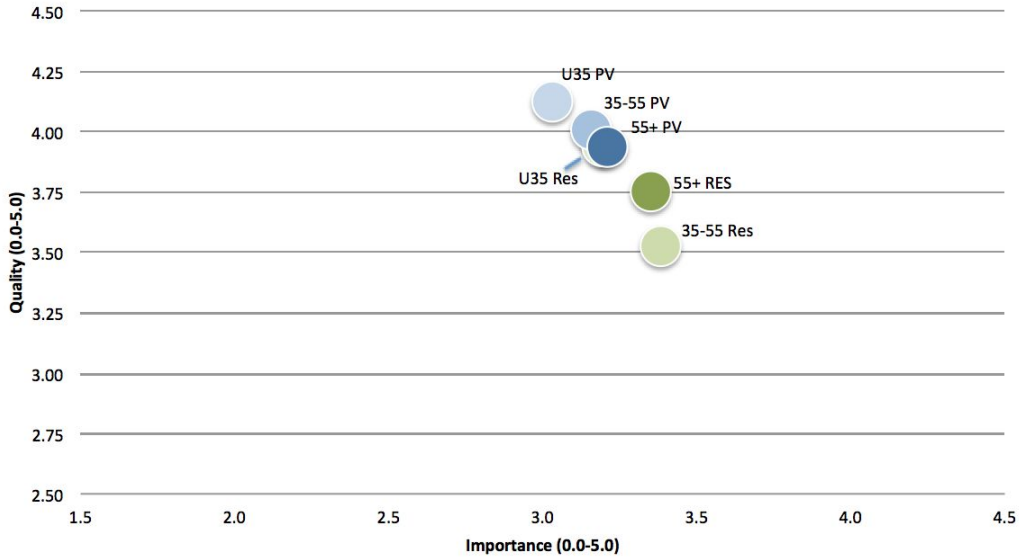
The components of Tours that score the highest for Importance (see above) to Residents (N=115) are Helicopter Tours and Scuba & Snorkeling Tours (right side). A number of components score a perfect 5.0 for Quality, while Fishing Charters Tours scores the lowest for Quality (bottom).



For Previous Visitors (N=193), the Tours that score the highest for Importance are Wine & Tasting Tours, Dolphin & Whale Watching, Nature & Wildlife, Food and Walking (right side).

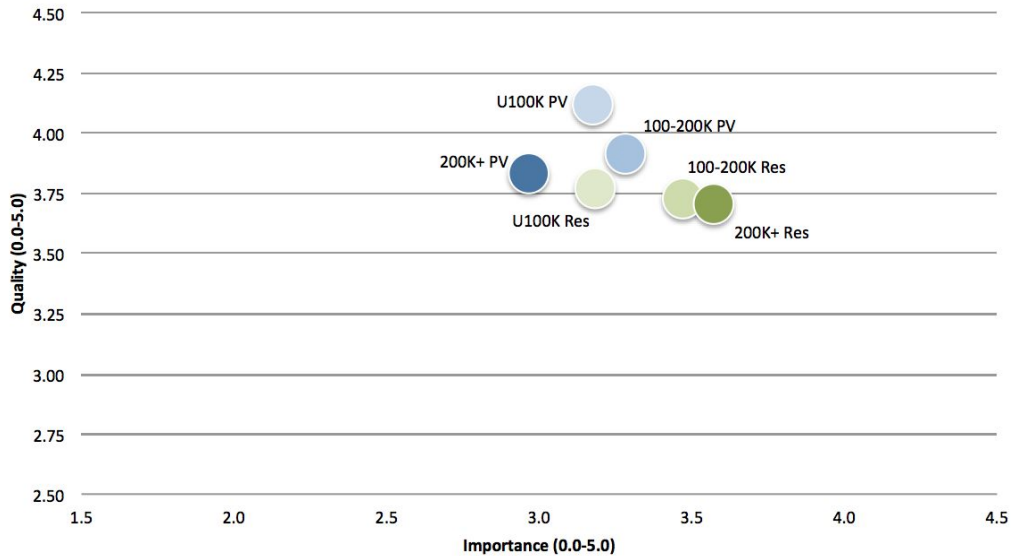


### San Luis Obispo County Experiences (Shopping)

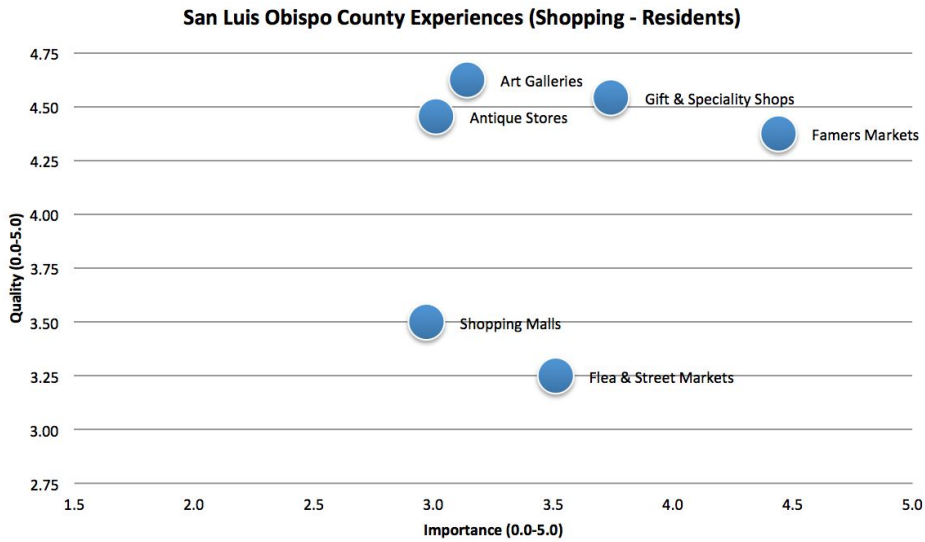


Residents of all ages generally score SLO County Shopping more important than Previous Visitors, but Previous Visitors generally score SLO County Shopping higher for Quality.

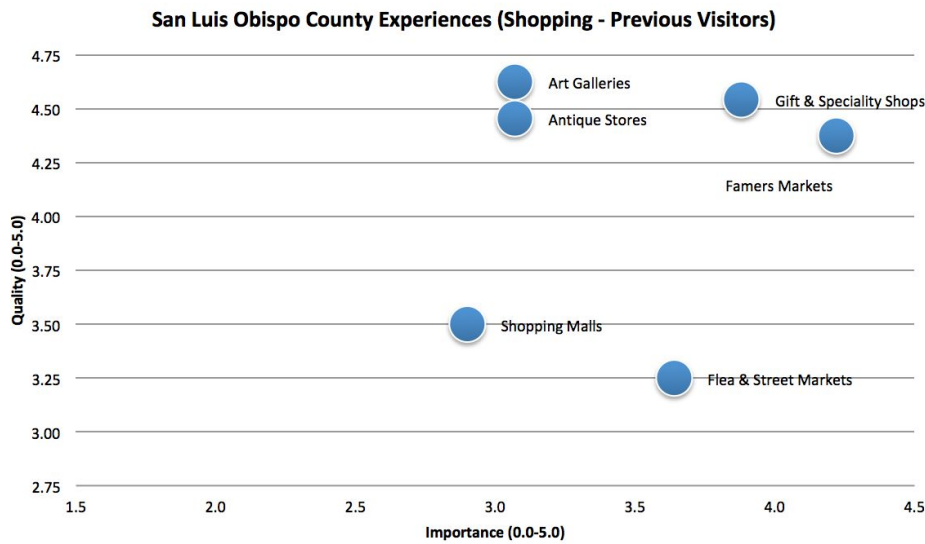
### San Luis Obispo County Experiences (Shopping)



It is interesting to note that affluent Residents (200k+) rate SLO County Shopping most important, while affluent Previous Visitors (200k+) rate SLO County Shopping the least important.

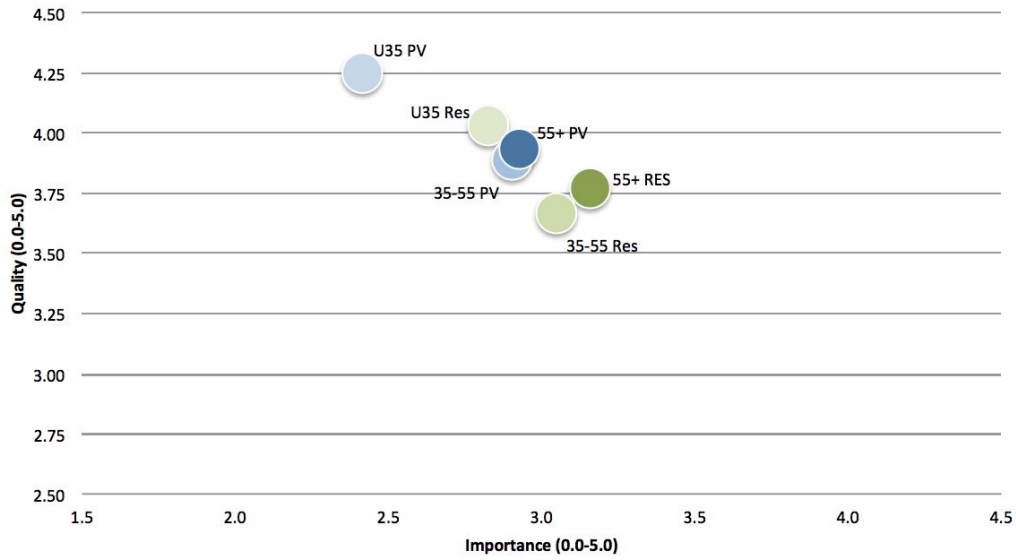


The component breakout of Shopping by Residents (N=197) show Farmers Markets as the most important part (on right), while Art Galleries, Gift & Specialty Shops score the highest for Quality. Flea & Street Markets score the lowest for Quality.



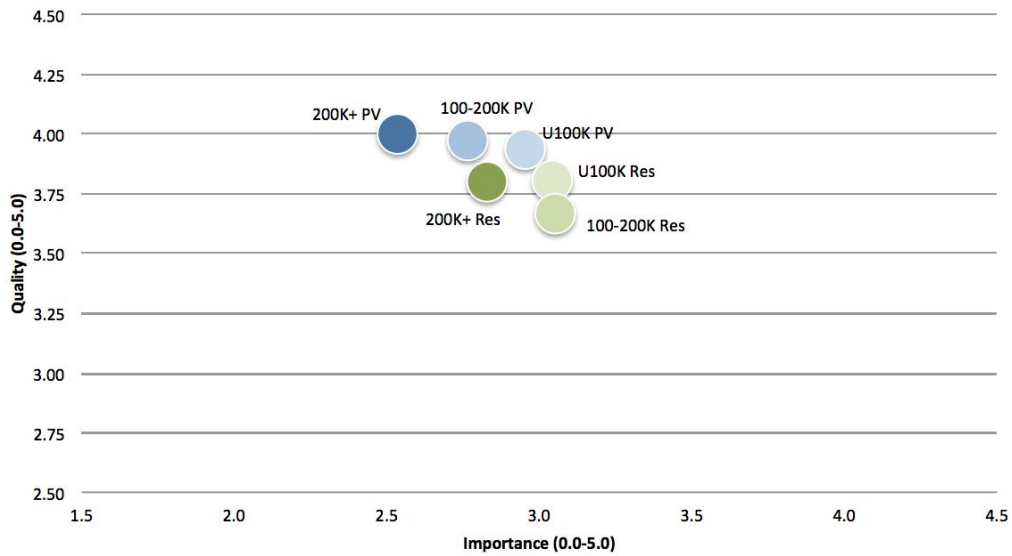
The component breakout for Shopping by Previous Visitors (N=342) follows a similar pattern. See above.

### San Luis Obispo County Experiences (Museums)

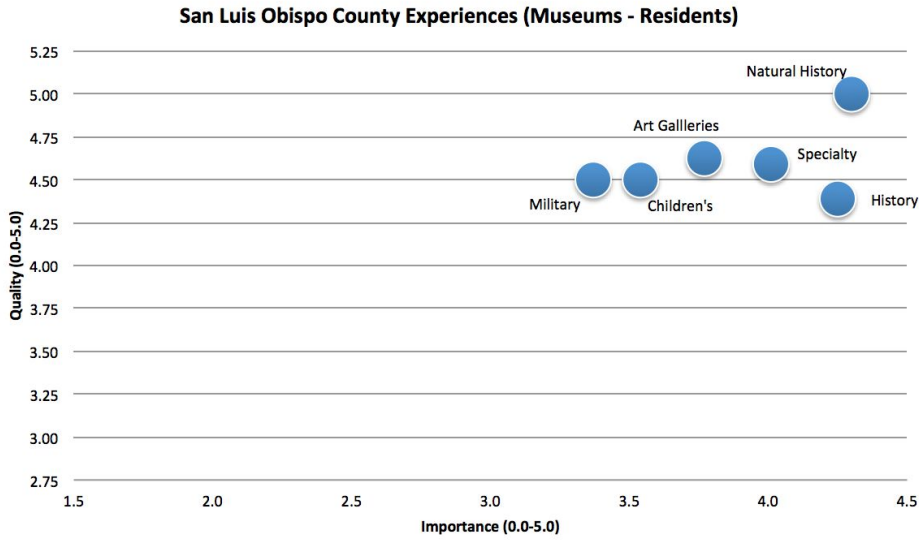


Residents of all ages score SLO County Museums as more important than Previous Visitors, while Previous Visitors score this same category higher for Quality.

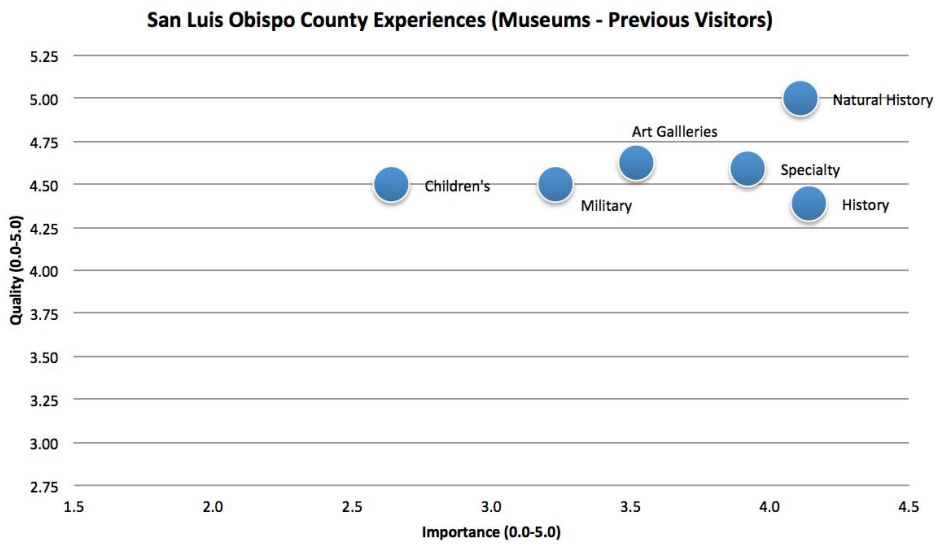
### San Luis Obispo County Experiences (Museums)



Residents and Previous Visitors who are more affluent (200k+) rate SLO County Museums the lowest Importance.

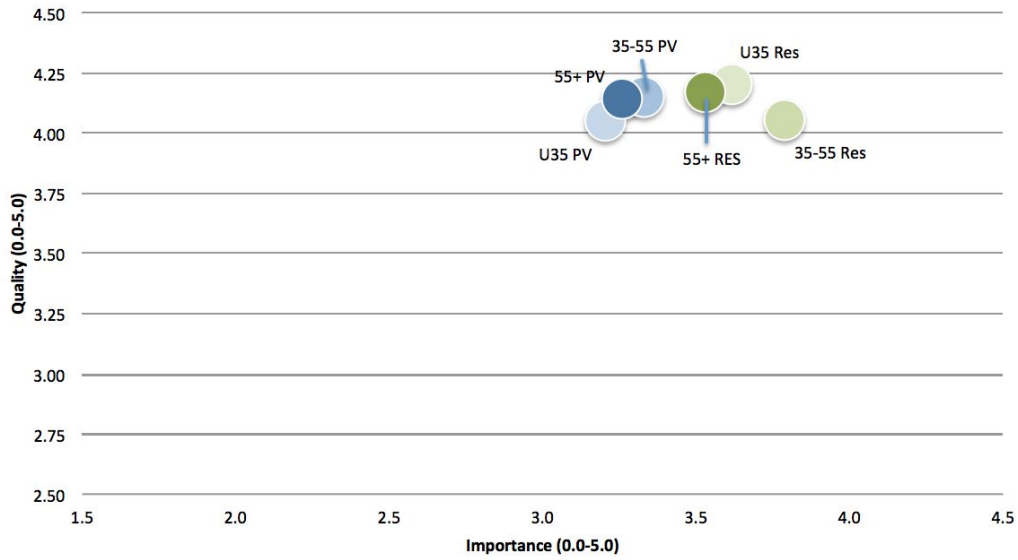


Residents (N=143) score Natural History and History Museums as the most Important part of this category (right side), while Natural History scores the highest for Quality.



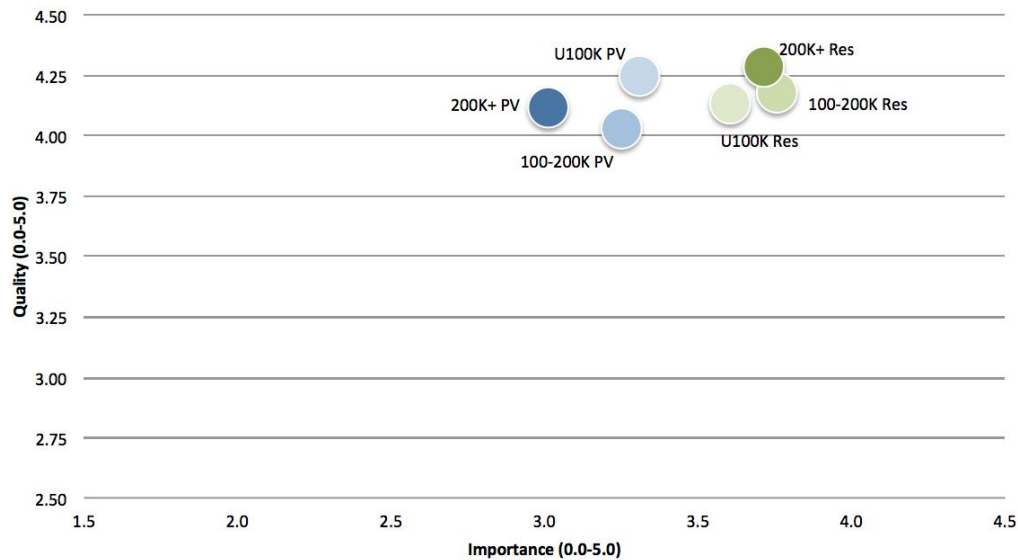
The same results are true for Previous Visitor (N=239) breakout of Museums.

### San Luis Obispo County Experiences (Events and Festivals)



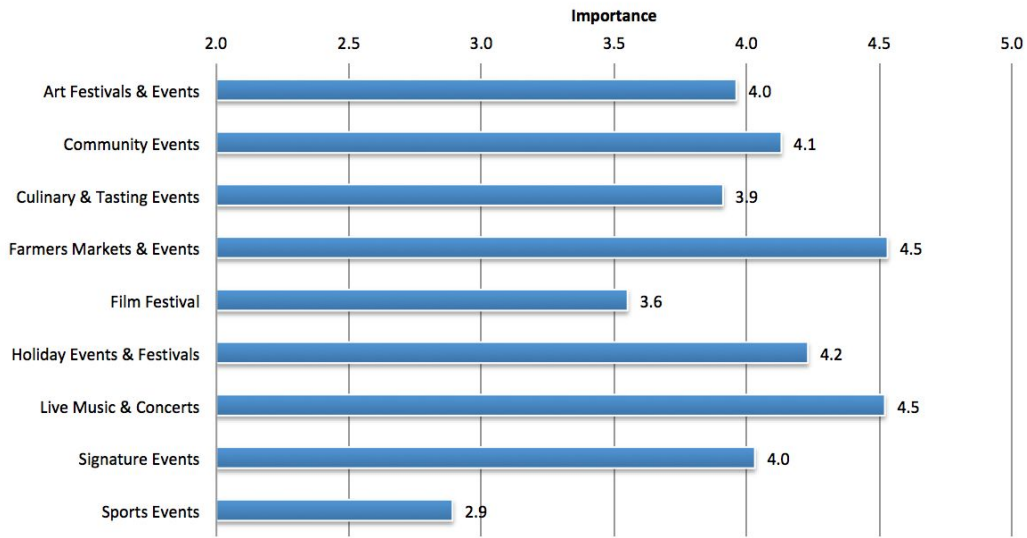
Residents of all ages score SLO County Events and Festivals higher for Importance than Previous Visitors.

### San Luis Obispo County Experiences (Events and Festivals)



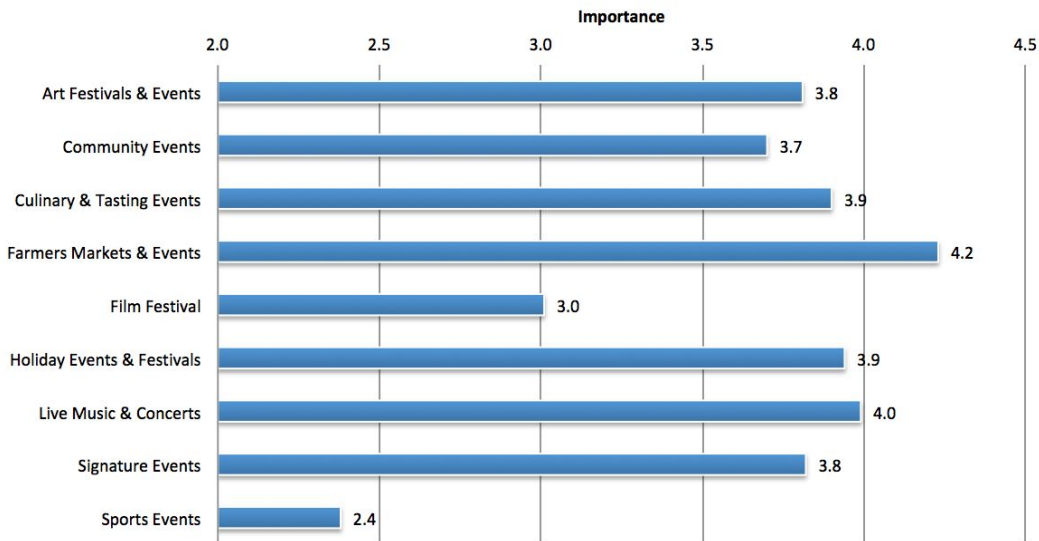
The most affluent Residents (200k+) score SLO County Events and Festivals the highest Quality, while the most affluent Previous Visitors (200k+) score SLO County Events and Festivals the least important.

**San Luis Obispo County Experiences (Events & Festivals - Residents)**



Residents (N=251) score Farmers Markets and Live Music & Concerts as the most important type of Events & Festivals. They also score Sports Events as the least important type of Events & Festival. Please note there are no Quality ratings available from TripAdvisor for this category.

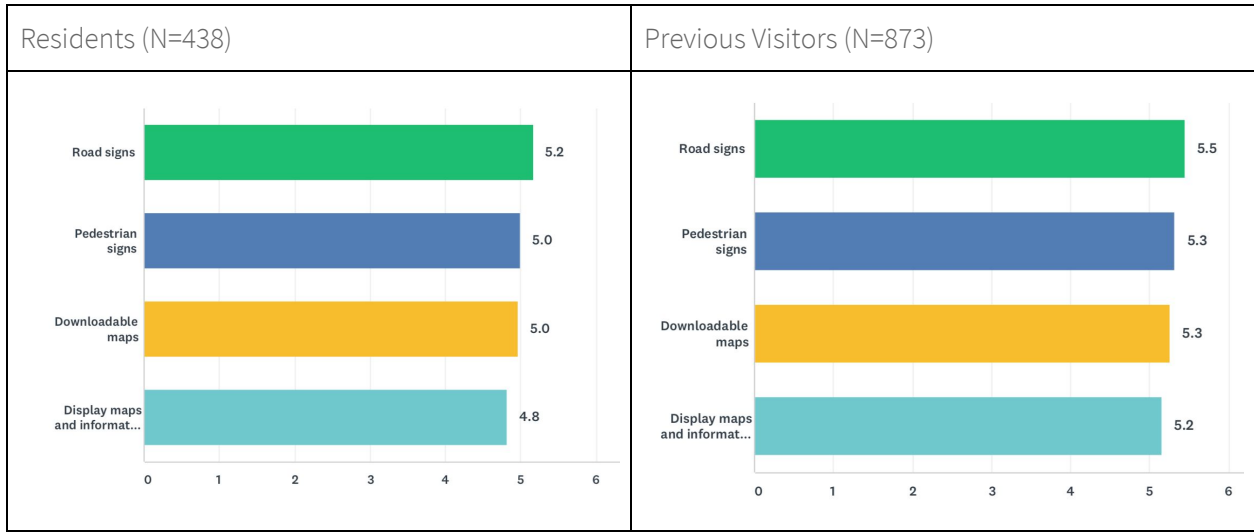
**San Luis Obispo County Experiences (Events & Festivals - Previous Visitors)**



Previous Visitors (N=376) also score Farmers Markets as the most important type of Events & Festivals followed by Live Music & Concerts, Culinary & Tasting Events and Holiday Events & Festivals. They also score Sports Events as the least important type of Events & Festival.

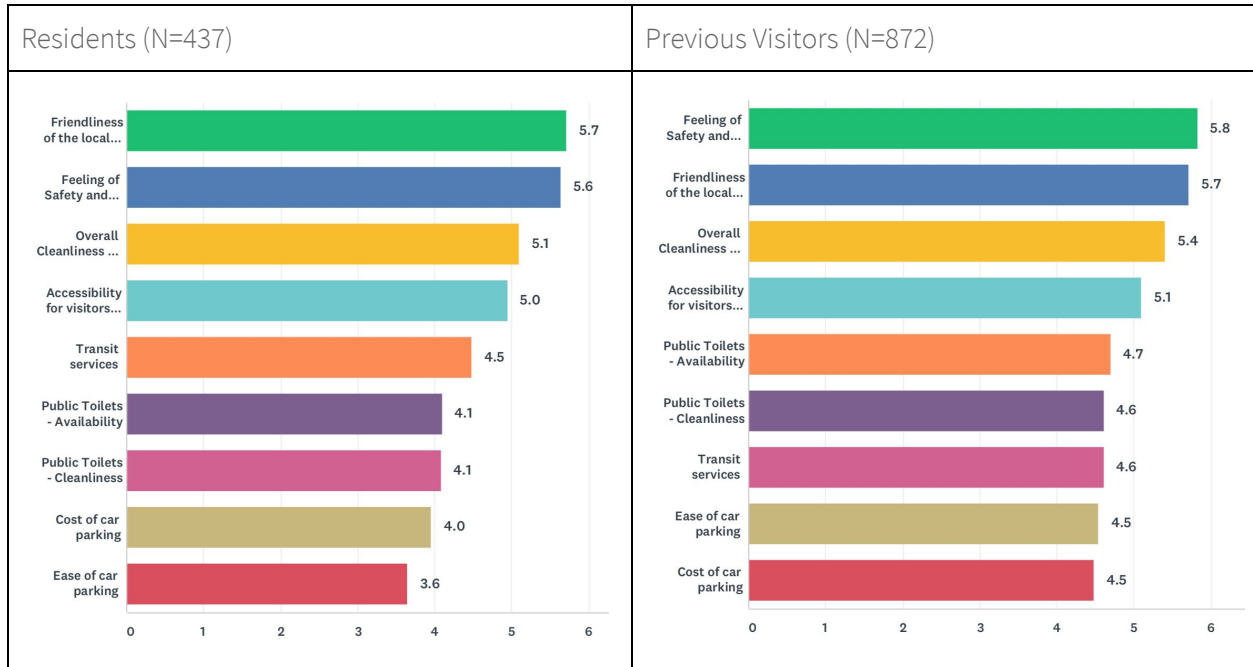
**Q53: Rate your views on SLO CAL: N=1,311**

Previous Visitors consistently rated SLO CAL’s Road Signs, Pedestrian Signs, Downloadable Maps and Display Maps and Information Boards better than Residents’ ratings. Please note: a score of 4.0 is Neutral, 5.0 is “Good” and 6.0 is “Very Good”.



**Q54: Rate your views on SLO CAL: N=1,309**

Residents rated that the “Friendliness of the local population” the same as Previous Visitors at 5.7, but Residents rated “Feeling of Safety and Security” lower at 5.6 than Previous Visitors at 5.8. In all other categories, Previous Visitors rated SLO CAL better than Residents.



**Q55: General Comments**

If you would like to leave us additional thoughts about your visit(s) to SLO CAL, other places you visit or aspects of SLO CAL tourism that have not been covered in the questions above, please do so here. N=388

When asked for any additional comments, the comments were positive, negative, suggestive and helpful. The range of comments was particularly wide and not applicable to a concise summary. A complete extraction of General Comments is included in a separate document.



 RESONANCE

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