

## INTRODUCTION

As a valued lodging partner of our Highway 1 tourism community in San Luis Obispo County, you are invited to participate in this confidential 10-minute survey. In 2009, the San Luis Obispo County Board of Supervisors established the San Luis Obispo County Tourism Business Improvement District (commonly referred to as the CBID). This district applies a 2% assessment (paid by overnight guests) to all lodging businesses—including hotels, motels, bed & breakfasts, and vacation rentals—within its boundaries.

**Highway 1 Tourism Alliance**, the private non-profit corporation that manages the CBID, is contracted with the County to administer these funds in support of the tourism promotion activities outlined below. The Highway 1 Tourism Alliance (marketed to consumers as the Highway 1 Road Trip) is currently undertaking a process to better understand the needs of our partners and ensure the long-term vitality of our destination.

The survey is being administered by Whereabout, an independent destination strategy and research company with a strong track record of community engagement and evaluation. The goal of the survey is to identify current member priorities, evaluate the perceived value of the current organizations, and gather input on how funds could be allocated moving forward.

### **How the Funds Are Used:**

**50% Regional Tourism Marketing**—50% of the collected funds are invested in regional marketing efforts to attract visitors to the coastal region of SLO County along Highway 1 and are managed by Highway 1 Tourism Alliance. This includes the successful Highway 1 Road Trip campaign and our award-winning Stewardship and Sustainability program, both designed to boost tourism and support long-term destination appeal.

**50% Local Tourism Marketing**—The remaining 50% is returned to the local communities where the funds originated and are managed by their local tourism boards (also known as Local Fund Areas), with oversight from Highway 1 Tourism Alliance. These dollars directly support local tourism-related efforts such as beautification projects, event and festival sponsorships, infrastructure improvements, and targeted marketing designed to drive overnight stays at lodging businesses within the local communities.

Your feedback will help guide our marketing, destination development, and visitor management strategies, as well as inform how we collaborate with other tourism organizations like Visit SLO CAL and Visit California to showcase our coastal communities to a larger audience.

Whether you operate a boutique hotel, a coastal inn, a B&B, or a vacation rental, your voice matters. Your participation in this survey will help shape how we move forward together, ensuring our efforts align with your needs and priorities. We know your time is valuable, and we sincerely appreciate your input.

# SURVEY

## ABOUT YOU



Complete the survey electronically using this QR code

1. Please identify your role:

- Lodging property owner
- Lodging business operator
- Lodging business owner AND operator

2. In which of the following communities do you own or manage lodging properties (check all that apply):

- Avila Beach
- Cambria
- Cayucos
- Edna Valley/Arroyo Grande Valley/Unincorporated SLO
- Los Osos/Baywood Park/Unincorporated Morro Bay
- Oceano/Nipomo
- San Simeon/Ragged Point
- Other (please specify): \_\_\_\_\_

3. What type of property do you represent or own?

- Hotel/Motel/Bed & Breakfast
- Vacation Rental (skip to Question 5)

## HOTEL/MOTEL/BED & BREAKFAST

4. Please provide the primary business address(es) for the lodging property(ies) or business(es) you represent: \_\_\_\_\_

Skip to Question 12

## VACATION RENTAL

5. Which describes your business or the organization you work for?

- Individual vacation rental owner with one or more active properties
- Vacation rental property manager who manages multiple properties on behalf of owners (skip to Question 9)

## INDEPENDENT VACATION RENTAL OWNER

6. How many individual vacation rentals do you own in these communities: San Simeon, Ragged Point, Cambria, Cayucos, Los Osos, Baywood, Avila Beach, Oceano, Nipomo, Arroyo Grande Valley, or Edna Valley? \_\_\_\_\_

7. Do you actively rent your property to visitors?

- Yes
- No

8. Please provide the address(es) for the vacation rental(s) you own in the communities listed above:

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Skip to Question 12

## VACATION RENTAL MANAGEMENT COMPANY

9. How many vacation rentals do you represent in these communities: San Simeon, Ragged Point, Cambria, Cayucos, Los Osos, Baywood, Avila Beach, Oceano, Nipomo, Arroyo Grande Valley, or Edna Valley? \_\_\_\_\_

10. What is the name of your vacation rental management company? \_\_\_\_\_

11. In the invitations for this survey, we gave vacation rental owners the option to authorize their management companies to respond on their behalf. Please list the addresses of those properties for which you have received such authorization and for which you will share that documentation with Highway 1 Road Trip:

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## CBID REGIONAL MARKETING – AWARENESS & UNDERSTANDING

**This section of questions is about the 50% of CBID funds designated for Regional Tourism Marketing. Highway 1 Tourism Alliance, the same organization that markets regionally to visitors under the brand of “Highway 1 Road Trip,” manages these funds and oversees the regional marketing programs.**

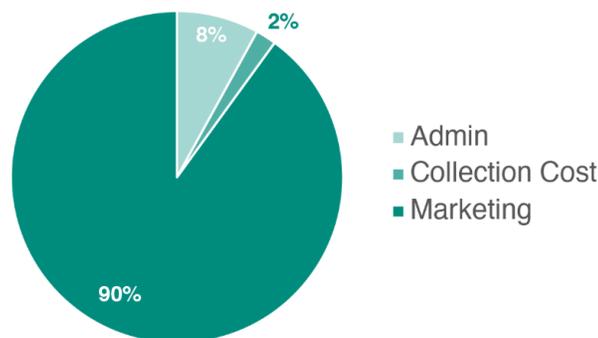
12. On a scale of 1-5, where 1 is low understanding and 5 is high understanding, how would you rate your current understanding of how CBID regional funds are used?

- 1 - low understanding
- 2
- 3
- 4
- 5 - high understanding

## CBID REGIONAL MARKETING – PRIORITIES & IMPACT

Over the past 15 years, the Highway 1 Tourism Alliance (marketed to consumers as the Highway 1 Road Trip) has strategically invested in programs designed to increase regional awareness and tourism. The Highway 1 Road Trip’s nearly 800-page website now serves as the primary source of travel information for more than 1.4 million potential visitors each year.

Despite a limited increase in lodging supply, the unincorporated areas supported by the CBID regional marketing programs have seen transient occupancy tax (TOT) growth outpace neighboring communities. The organization reinvests 90% of assessment funds directly into programs that benefit regional tourism, as illustrated in the chart below.



**Key accomplishments include:**

- Growing TOT collections by +157%
- Maintaining a potential visitor database of over 150,000
- Delivering national media coverage through robust public relations efforts
- Leading sustainable tourism initiatives through the award-winning Stewardship Travel for Good program
- Supporting consistent "Open for Business" messaging via the Highway 1 Road Conditions page
- Launching new branding efforts that significantly boosted awareness (including a map download feature that generated 92% intent to visit)
- Expanding reach through cooperative programs with local tourism boards (also known as Local Fund Areas), which extend paid media opportunities to individual communities



13. Please rank the following CBID regional marketing services and initiatives in **ORDER OF IMPORTANCE FOR YOUR BUSINESS:**

- Tourism marketing to leisure travelers, independently and in partnership with Visit SLO CAL and Visit California (Sent 1.4 million potential visitors to highwayroadtrip.com from major CA markets via paid media, published stories and social media promotions)
- Destination stewardship programs and activities (Created both the Whale Trail and the Monarch Butterfly Trail, hiking trail restoration and educational signage in parks and sanctuaries, to name a few)
- Grants for local beautification and infrastructure projects (Beach clean-up kits, interpretative signage, preservation of historic sites including Red Barn, Cayucos Pier and Vets Hall, and Piedras Blancas Light station lens)
- Support for or promotion of events & festivals (Spartan Race, Amgen Bike Ride, Sunset Savor on the Coast and Cow Parade to name a few)

14. Thinking about the same list of CBID regional marketing services and initiatives, how would you rate the **POSITIVE IMPACT YOU'VE SEEN FOR YOUR BUSINESS OR COMMUNITY** on a scale from 1-5, where 1 is no impact and 5 is high impact?

	1 - No impact	2	3	4	5 - high impact	I don't know
Tourism marketing to leisure travelers, independently and in partnership with Visit SLO CAL and Visit California (sent 1.4 million potential visitors to highwayroadtrip.com from major CA markets via paid media, published stories and social media promotions)	<input type="radio"/>					
Destination stewardship programs and activities (created both the Whale Trail and the Monarch Butterfly Trail, hiking trail restoration and educational signage in parks and sanctuaries, to name a few)	<input type="radio"/>					
Grants for local beautification and infrastructure projects (beach cleanup kits, interpretative signage, preservation of historic sites including Red Barn, Cayucos Pier and Vets Hall and Piedras Blancas Light station lens)	<input type="radio"/>					
Support for or promotion of events & festivals (Scarecrow Festival, BlendFest on the Coast, Amgen Bike Race, Sunset Savor the Central Coast, City to Sea Marathon, Spartan Race and many more)	<input type="radio"/>					

15. Please provide some context to your answers to the previous two questions:

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16. Are there other initiatives you would like to see from the CBID regional marketing programs that aren't listed above?

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## LOCAL TOURISM BOARD – AWARENESS & UNDERSTANDING

This section of questions is about the remaining 50% of the assessment, which is designated for Local Tourism Marketing, and is overseen by the local tourism boards (also known as Local Fund Areas) in your community, including:

- San Simeon | Ragged Point Tourism Alliance
- Cambria Tourism Board
- Visitor Alliance of Cayucos
- Visit Los Osos | Baywood
- Avila Beach Tourism Alliance
- Oceano Nipomo Tourism Board
- SLO Wine Lodging Alliance | Edna Valley and Arroyo Grande Valley

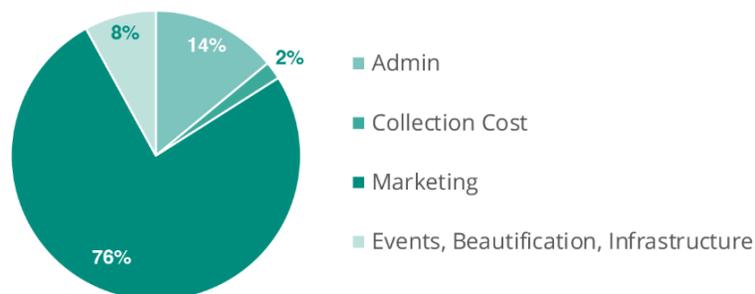
17. On a scale of 1-5, where 1 is low understanding and 5 is high understanding, how would you rate your current understanding of how your local tourism board funds are used?

- 1 - low understanding
- 2
- 3
- 4
- 5 - high understanding

## LOCAL TOURISM BOARD – PRIORITIES & IMPACT

The assessment funds allocated for local areas support both tourism marketing and the promotion of community-specific initiatives. Over the years, each participating community has used these funds to invest in marketing efforts to drive visitation; sponsored more than 200 local events like Cambria Chamber's Art & Wine Festival, Scarecrow Festival, Amgen, and more. In addition, it has funded nearly 70 beautification and infrastructure projects—totaling investments over \$350,000 across 10 communities. These projects have included improvements such as the Cayucos Veterans Hall, 1st Street Beach Access, Piedras Blancas lens enclosure, Whale Trail signage, Western Monarch Trail, bird sanctuary signage, programs and events for the Chambers in Cambria, Cayucos, San Simeon, Los Osos and Nipomo, gateway signage, and many more.

The local areas reinvest over 75% of assessment funds directly into marketing programs that benefit local tourism, as well as investing 8% to support local events, and fund beautification and infrastructure projects. The chart below shows how the assessment monies were invested in the 2024-2025 fiscal year.



18. Please rank the following local tourism board services and initiatives in ORDER OF IMPORTANCE FOR YOUR BUSINESS:

- Beautification and infrastructure projects (Cayucos Vets Hall restoration, Cambria Skate Park restrooms, Nipomo Welcome to Old Towne signage, San Simeon Welcome sign and others)
- Support for or promotion of events & festivals (Scarecrow Festival, City to Sea Marathon, Arthritis Coast Classic Bike Ride, Cambria Christmas Market)
- Tourism marketing and promotion (Paid marketing on Google and social media to potential visitors in Los Angeles, San Francisco and Central Valley)

19. Thinking about the same list of local tourism board services and initiatives, how would you rate the POSITIVE IMPACT YOU'VE SEEN FOR YOUR BUSINESS OR COMMUNITY on a scale from 1-5, where 1 is no impact and 5 is high impact?

	1 - No impact	2	3	4	5 - high impact	I don't know
Beautification and infrastructure projects (Cayucos Vets Hall restoration, Cambria Skate Park restrooms, Nipomo Welcome to Old Towne signage, San Simeon Welcome sign and others)	<input type="radio"/>					
Support for or promotion of events & festivals (Scarecrow Festival, City to Sea Marathon, Arthritis Coast Classic Bike Ride, Cambria Christmas Market)	<input type="radio"/>					
Tourism marketing and promotion (Paid marketing on Google and social to potential visitors in Los Angeles, San Francisco and Central Valley)	<input type="radio"/>					

20. Please provide some context to your answers to the previous two questions:

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21. Are there other initiatives you would like to see from your local tourism board that aren't listed above?

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## FUTURE FUNDING PRIORITIES

22. Per its founding documents, the primary goal of the unincorporated San Luis Obispo County Tourism Business Improvement District (CBID) is to: "increase occupancy and room nights across all lodging types (motels, hotels, bed and breakfasts, vacation rentals) that pay the business improvement assessment within the CBID region while placing particular emphasis on programs that positively impact the slower lodging periods (shoulder seasons) and/or expand the impact of the higher occupancy times."

Given that goal, how would you prioritize the overall use of CBID funds moving forward?

- Tourism marketing to California leisure travelers (paid ads on Google and social media platforms, published stories in Travel + Leisure, Westways, Sunset Magazine and many others, as well as collaborative partnerships with LA Times and SF Gate)
- Destination stewardship programs and activities (created both the Whale Trail and the Monarch Butterfly Trail, hiking trail restoration and educational signage in parks and sanctuaries, to name a few)
- Grants for local beautification and infrastructure projects (beach clean-up kits, interpretative signage, preservation of historic sites including Red Barn, Cayucos Pier and Vets Hall, and Piedras Blancas Light station lens)
- Support for or promotion of events & festivals (Scarecrow Festival, BlendFest on the Coast, Amgen Bike Race, Sunset Savor the Central Coast, City to Sea Marathon, Spartan Race and many more)

23. Are there any other programs or things you'd like the CBID regional effort or your local tourism board to fund?

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## INVOLVEMENT & COMMUNICATION

24. To what degree have you been involved in giving input on CBID and/or local tourism board operations and priorities, on a scale from 1-5 where 1 is no involvement and 5 is high involvement?

- 1 - no involvement
- 2
- 3
- 4
- 5 - high involvement
- I don't know

25. Would you like to be involved in future CBID and local tourism board planning or engagement efforts? (If you choose "yes" or "maybe," please enter your contact information at the bottom of this page)

- Yes—please contact me about how I can be involved using my contact info below
- Maybe—keep me in the loop
- No—I'd prefer not to

26. Do you have any other comments, ideas, feedback, or questions?

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27. If you would like to be contacted about anything in this survey, please fill in the information below:

Topic \_\_\_\_\_  
Name \_\_\_\_\_  
Email Address \_\_\_\_\_  
Phone \_\_\_\_\_