



# HIGHWAY 1 ROAD TRIP/CBID

Stakeholder Satisfaction Survey 2025: Condensed Report

# BACKGROUND

## Background

The San Luis Obispo County Board of Supervisors held a hearing to consider the renewal of the San Luis Obispo County Tourism Business Improvement District (CBID) assessment for fiscal year 2025-2026. The CBID is a business improvement district formed in 2009 to promote tourism and support marketing and stewardship activities within the district, which mainly includes coastal and some inland unincorporated areas of the county. The hearing reviewed public testimony, protest levels, and the 2024 year-end report alongside the 2025-2026 draft budget, with a focus on the CBID's marketing efforts, financial status, and future strategic initiatives.

The protests received represented 8.148% of the assessed entities (based on weighted contribution), and came from 4 hotel/motels, 1 bed & breakfast, and 15 vacation rentals.

The Board's motion (right) initiated the process (pages 3-4) that resulted in this report.

## County Board of Supervisors Motion

“The Board receives public testimony and protests regarding the renewal of the San Luis Obispo County Tourism Business Improvement District; and upon conclusion of the hearing, finds a majority protest does not exist; continues to levy assessments; declares the CBID renewed; and receives and files the 2024 Year End Report and the 2025-26 Draft Budget of the San Luis Obispo County Tourism Improvement District. Furthermore, the Board directs CBID to conduct a survey of all lodging businesses (“members”) located within the CBID boundaries, that CBID funds be used to fund the survey. The goal of the survey is to identify current member priorities, evaluate the perceived value of the CBID, gather input on how CBID funds should be allocated moving forward. The survey shall be professionally conducted by an outside entity, with independent, third-party results. Furthermore, the Board directs staff to continue efforts to pursue full cost recovery for services provided by the Administrative Office related to the CBID.”

# METHODOLOGY & TIMELINE

## Survey Creation and Distribution

- Whereabout was contracted as an independent third-party contractor to administer the survey and analyze its results, in partnership from other independent contractors (Momentum Strategies, CR Consulting, and Civitas) who managed outreach to promote the survey, assisted with aligning County license records to responses, and provided information and context for this report.
- Master constituent spreadsheet provided by Tessa Cornejo, County Liaison, on September 16, 2025
  - File titled “Active BID Accounts with prop type”
  - Included 1,488 properties in the database; 1 was added based on a response received
  - 1 was Airbnb
- County staff approved cover letter, survey questions, and outreach plan
- A Spanish-language version of the online survey was developed and shared, but did not receive any responses
- Printed surveys with cover letter and return envelope were mailed on/about October 17 to 1,451 validated addresses in the database.
  - For hotels/motels/B&Bs where property address and owner address differed, mailings were sent to both addresses.
  - Name was included where provided. Follow up postcards were mailed on/about November 6 to 1,451 validated addresses in the database.
  - For hotels/motels/B&Bs where property address and owner address differed, mailings were sent to both addresses.
  - Name was included where provided.
- One-on-one outreach was conducted via email, telephone, in person and direct messaging on social media to encourage response.
- Responses were tracked by address with summary reports being sent out weekly to LFA administrators. Updates were sent multiple times per week as the closing date approached.
- A request was made that the County provide the weighted contribution so survey results can be analyzed using this data point (as summarized in the approved Outreach Plan). That information has not yet been provided.

# METHODOLOGY & TIMELINE

## Survey Analysis

- The survey was closed at end of day on November 19, 2025.
- 16 mailed surveys were received and were shared directly with Whereabout and entered by hand into the data set. One mailed response arrived after survey close, but was postmarked before the deadline, so was included. Three others were postmarked after the closing date and were not included.
- Addresses provided by respondents were used to identify license numbers, and in some cases license numbers were provided by respondents that were not on the County list—these appeared to be valid license numbers and may be newer licenses.
- Each license number was treated as a unique respondent. In some cases respondents hold or represent multiple licensed properties, and in those cases each license number was assigned a duplicate response.
- Some properties submitted duplicate responses, and we prioritized them as follows:
  - If one duplicate was incomplete, or less complete, the more complete response was included.
  - If multiple complete responses were received from one license number, the first one submitted was included.
  - If both paper and electronic responses were received for a license number, the electronic response was included.
- Responses that did not provide enough information to identify a valid license number were not included in the analysis.
- Responses with no entries beyond the demographic data were not included in the analysis.
- Responses that listed incorrect property types, or where the County license was not aligned to the correct property type, were corrected in the analysis data set.
- Open-ended responses were not edited or corrected
- Once the above filters were applied, 235 unique license numbers were included in the analysis, broken down as follows:
  - 5 Bed & Breakfast
  - 45 Hotel/Motel
  - 185 Vacation Rentals
- Of the Vacation Rental responses, 17 self-identified as inactive properties. These were not included in the general analysis but were given a separate analysis.
- The response data was analyzed through four “lenses”:
  - All active properties
  - Active properties by property type
  - Active properties by Local Fund Area
  - All inactive properties
- Two additional analyses are included at the end of the report: licensees who submitted protests, and highly engaged respondents

# WHEREABOUT OBSERVATIONS

## Engagement

- Overall, we found engagement with the survey to be quite high, with respondents representing the full breadth of Local Tourism Board areas
- We had an extremely high response rate of 90% from hotels/motels (45 from a set that, when corrected for misclassifications, has a total of 50)
- We included 175 licensed vacation rentals in our analysis, 158 of which self-identified as active—of the 1,406 licensed vacation rentals in the CBID areas, 747 are listed by the County as zero-rents, leaving 659 active VRs. Therefore, these 158 active properties represent a 24% response rate for active VRs—a typical target response rate in our tourism industry surveys.
- Among the vacation rental responses, 93 were from individual owner/operators (not vacation rental management companies)
- 75% of all respondents expressed an interest in learning more and perhaps being more involved: 38% said yes, and 37% said maybe

## Respondent Understanding

- 55% of active properties expressed a strong understanding of how CBID regional funds are used, while only 32% expressed low understanding.
- Similarly, 51% of active properties expressed a strong understanding of how Local Tourism Board funds are used, while only 30% expressed low understanding.
- However, in some cases, open-ended responses demonstrate a lack of understanding of the limits of the CBID's purview, and request things that are in the domain of County government or other entities. Likewise, many comments indicate the perception that the assessment is a tax on business owners and/or conflate the assessment with Transient Occupancy Tax.

# WHEREABOUT OBSERVATIONS

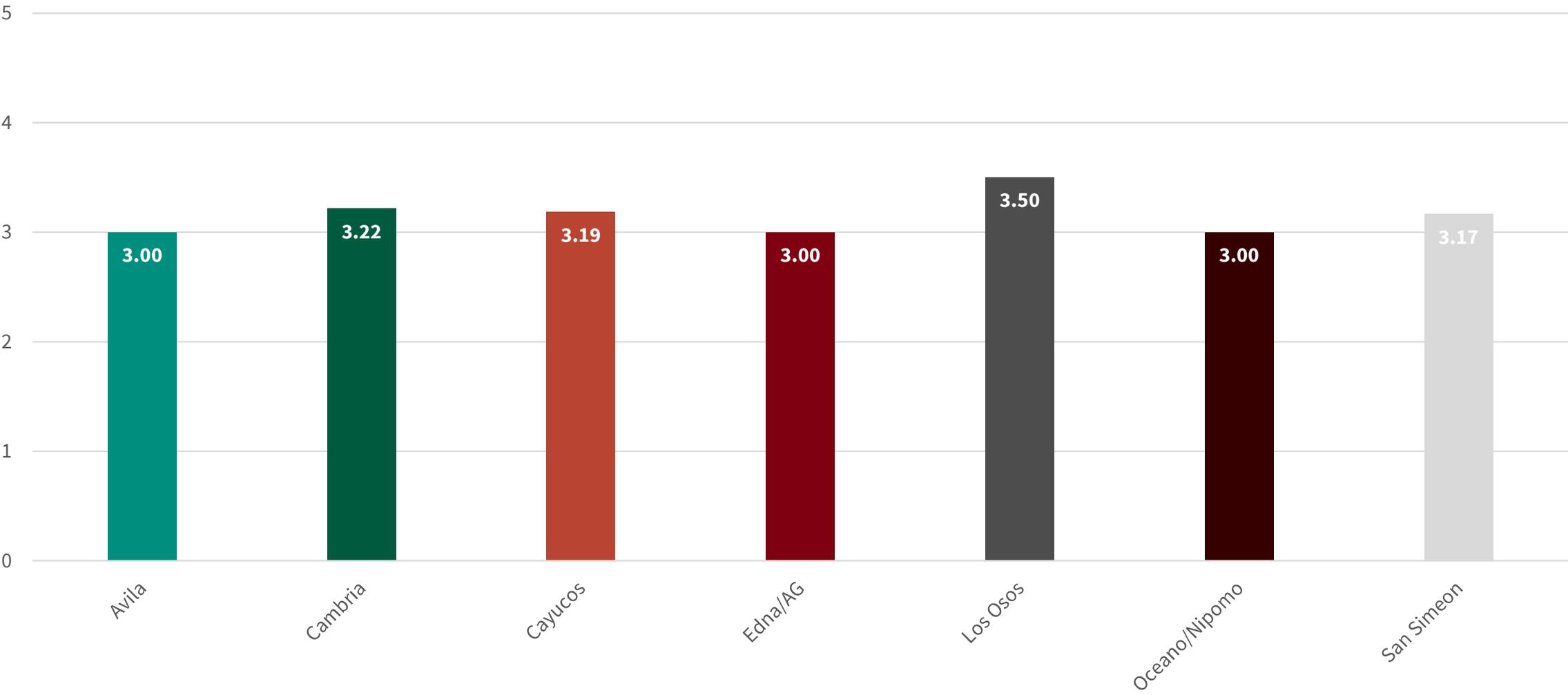
## Respondent Priorities

- Respondents expressed a clear priority for tourism marketing as the primary focus of the organization to support their business, both at the CBID regional level (3.62/4.00) and at the Local Tourism Board level (2.43/3.00)
- Events/festivals and beautification initiatives were closely ranked both at the CBID regional level and at the Local Tourism Board level, while stewardship initiatives were ranked least important at the CBID regional level.
- When asked about future prioritization of CBID funds, tourism marketing and promotion was the clear leader (3.41/4.00), followed by events/festivals (2.59/4.00), beautification (2.20/4.00), and stewardship (1.81/4.00).
- While some minor variation occurs in prioritization between property types and between Local Tourism Board areas, we don't see any significant differences that warrant highlighting.

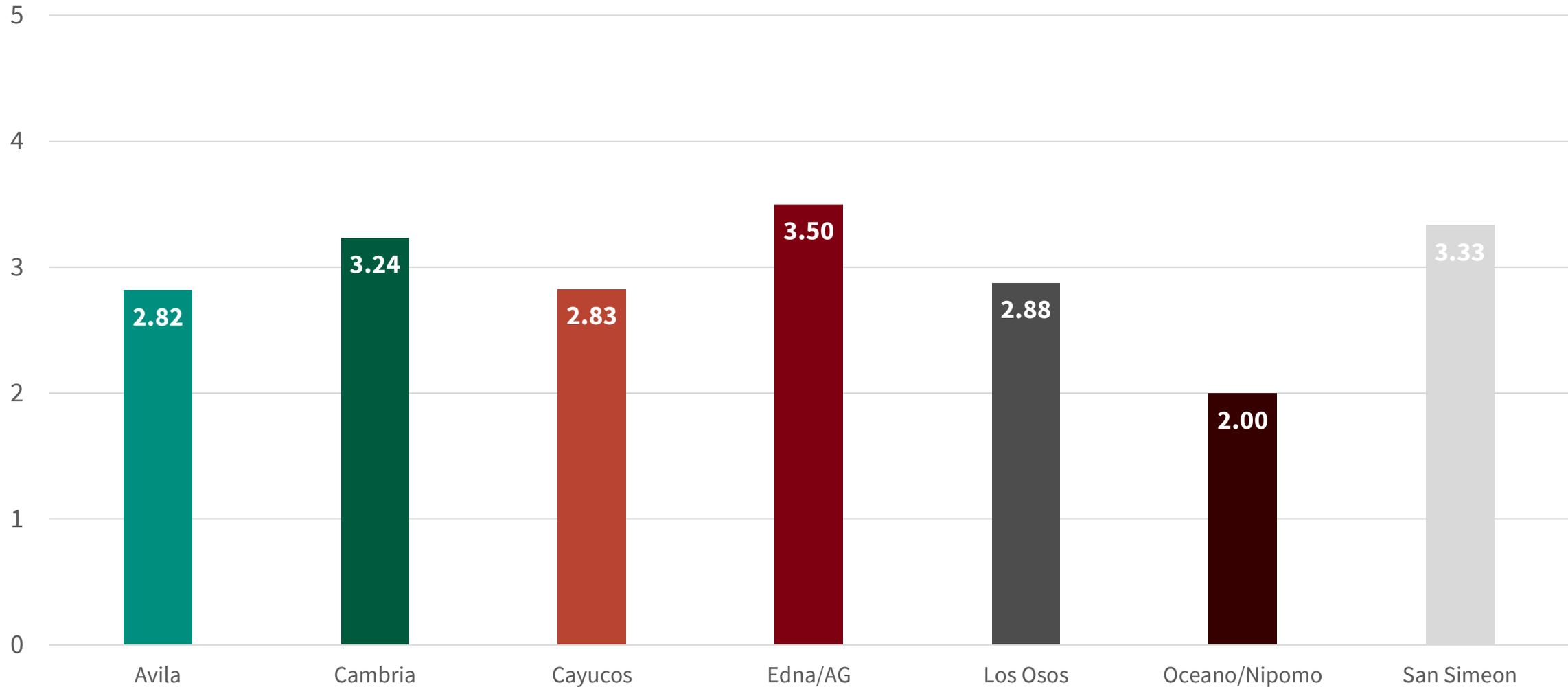
## Perception of Positive Impacts

- Ratings of the impact of each set of initiatives averaged slightly above the mid-point: at the CBID regional level marketing and promotion was 3.93/5.00, beautification was 3.85/5.00, stewardship was 3.41/5.00, and events/festivals was 2.85/5.00.
- Impact ratings for the Local Tourism Board level: tourism marketing/promotion 4.01/5.00, beautification 3.48/5.00, and events/festivals 3.93/5.00.
- Interestingly, impacts were scored significantly higher by inactive vacation rental properties, both at the CBID level (average 3.98/5.00) and at the Local Tourism Board level (average 3.86/5.00).
- Notably, among those who submitted protests or letters regarding the BID, impact scores (avg. 3.50) were consistent with respondents at large (avg. 3.51).
- Among respondents who scored themselves a 4 or 5 on their involvement, impact scores were exceptionally high (avg. 4.61), implying that those who know more about the organization and its work recognize greater positive impact.

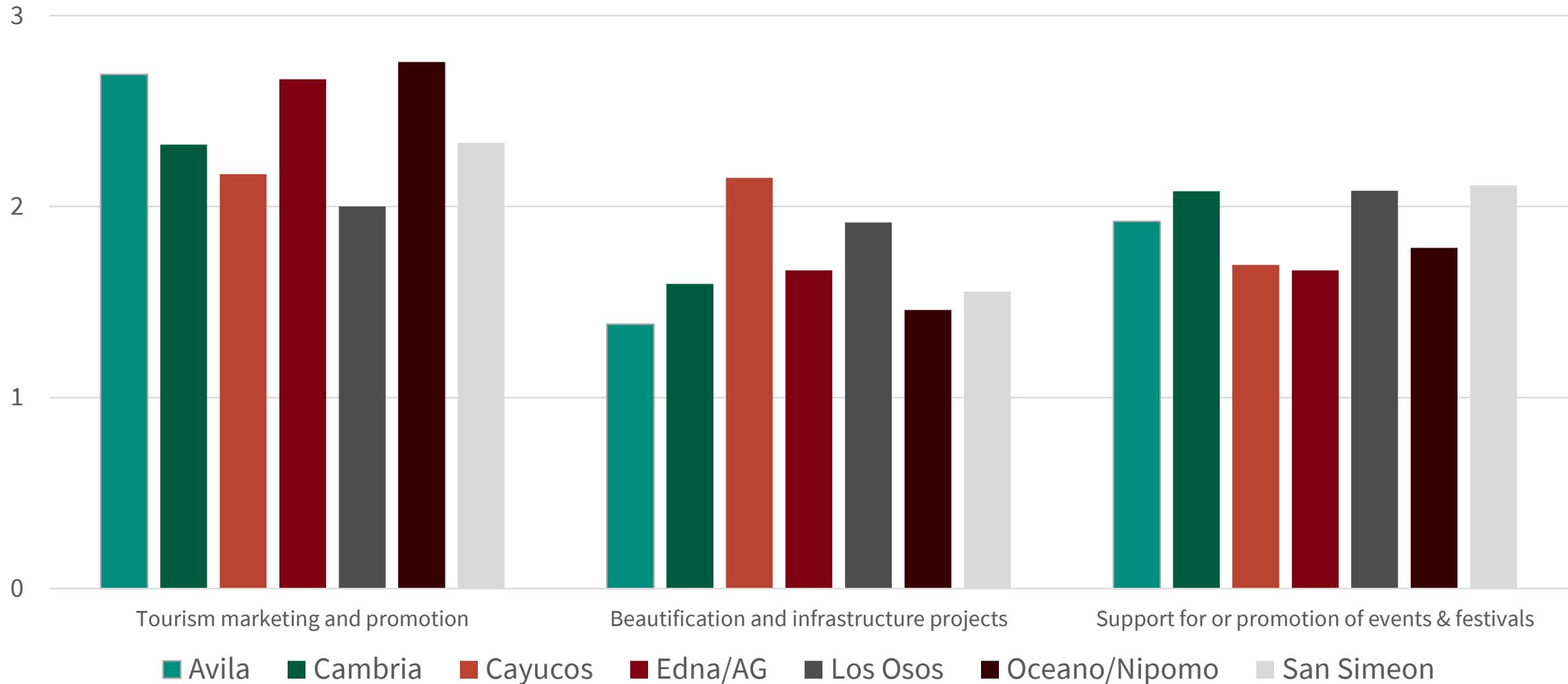
# HOW WOULD YOU RATE YOUR CURRENT UNDERSTANDING OF HOW CBID REGIONAL FUNDS ARE USED? (5=HIGH UNDERSTANDING)



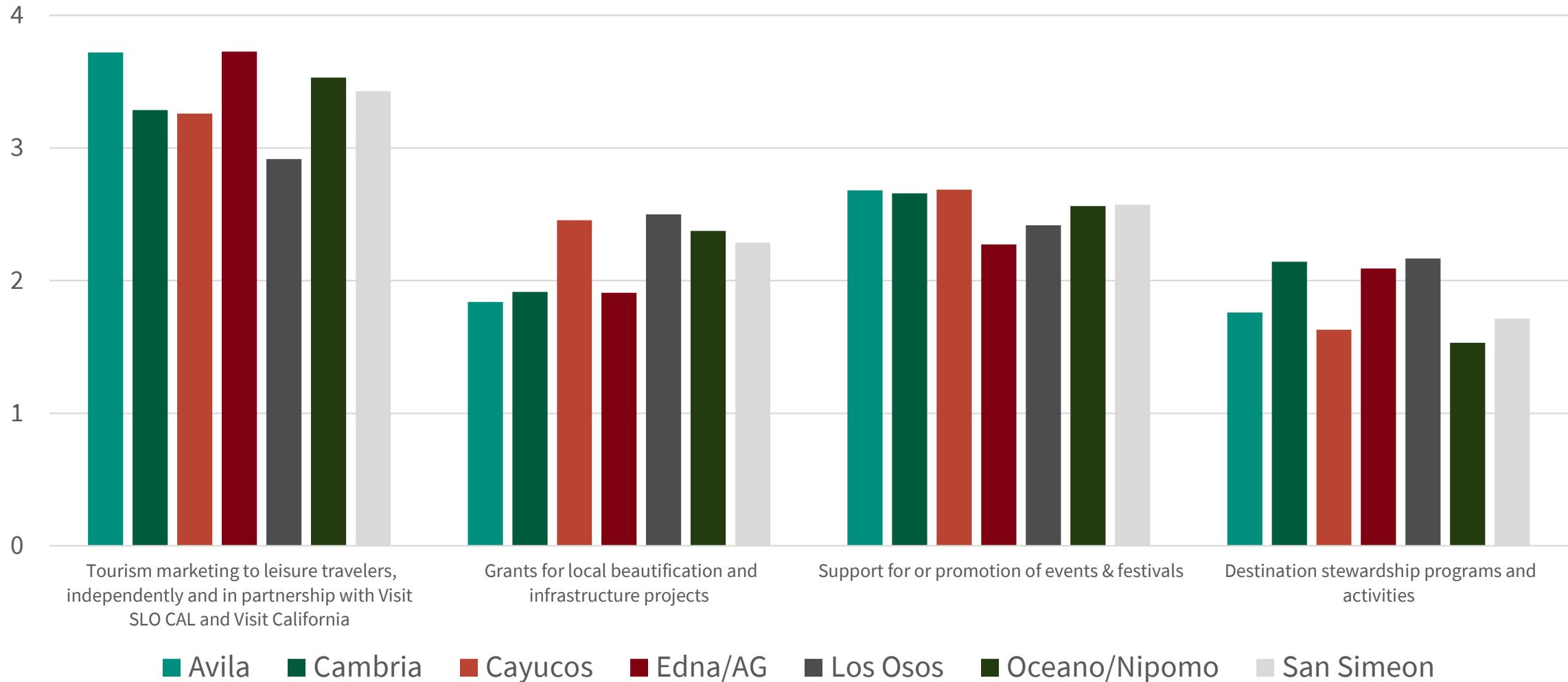
# HOW WOULD YOU RATE YOUR CURRENT UNDERSTANDING OF HOW YOUR LOCAL TOURISM BOARD FUNDS ARE USED? (5=HIGH UNDERSTANDING)



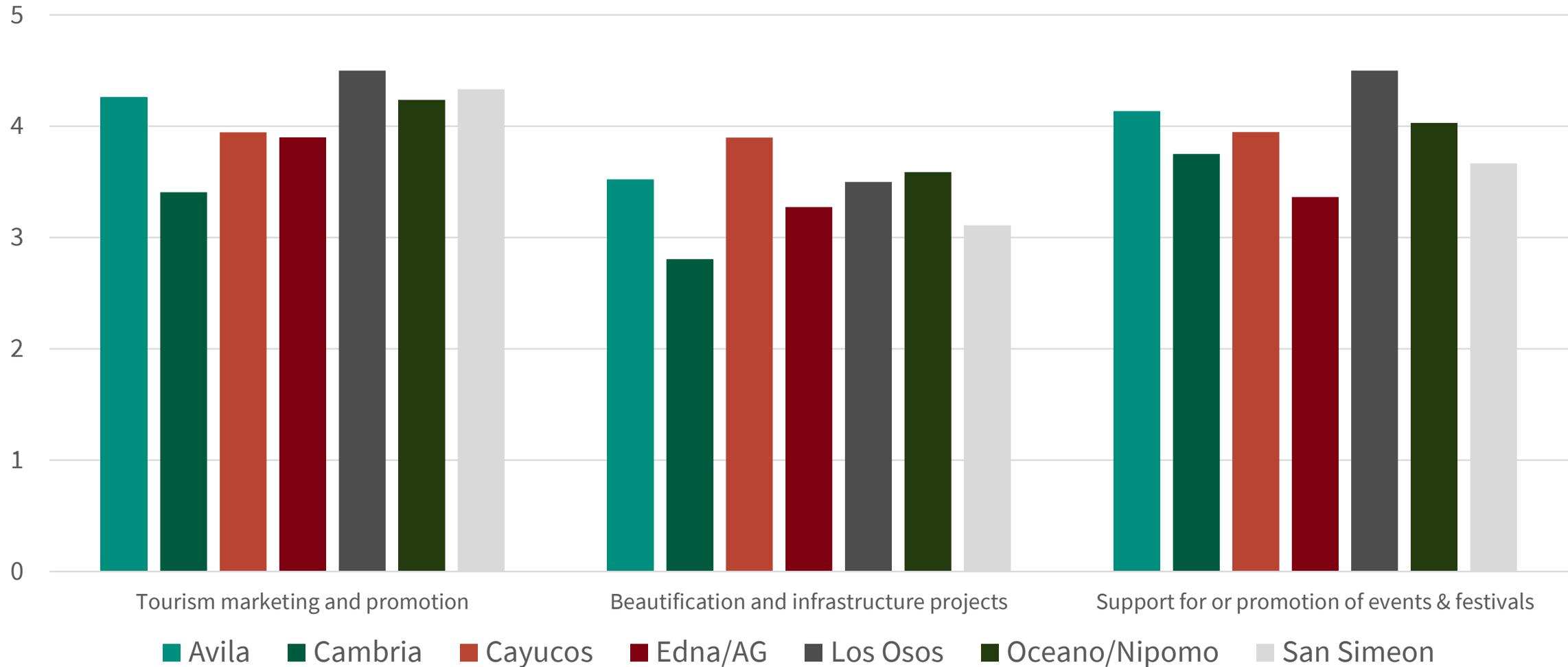
# PLEASE RANK THE FOLLOWING LOCAL TOURISM BOARD SERVICES AND INITIATIVES IN ORDER OF IMPORTANCE FOR YOUR BUSINESS:



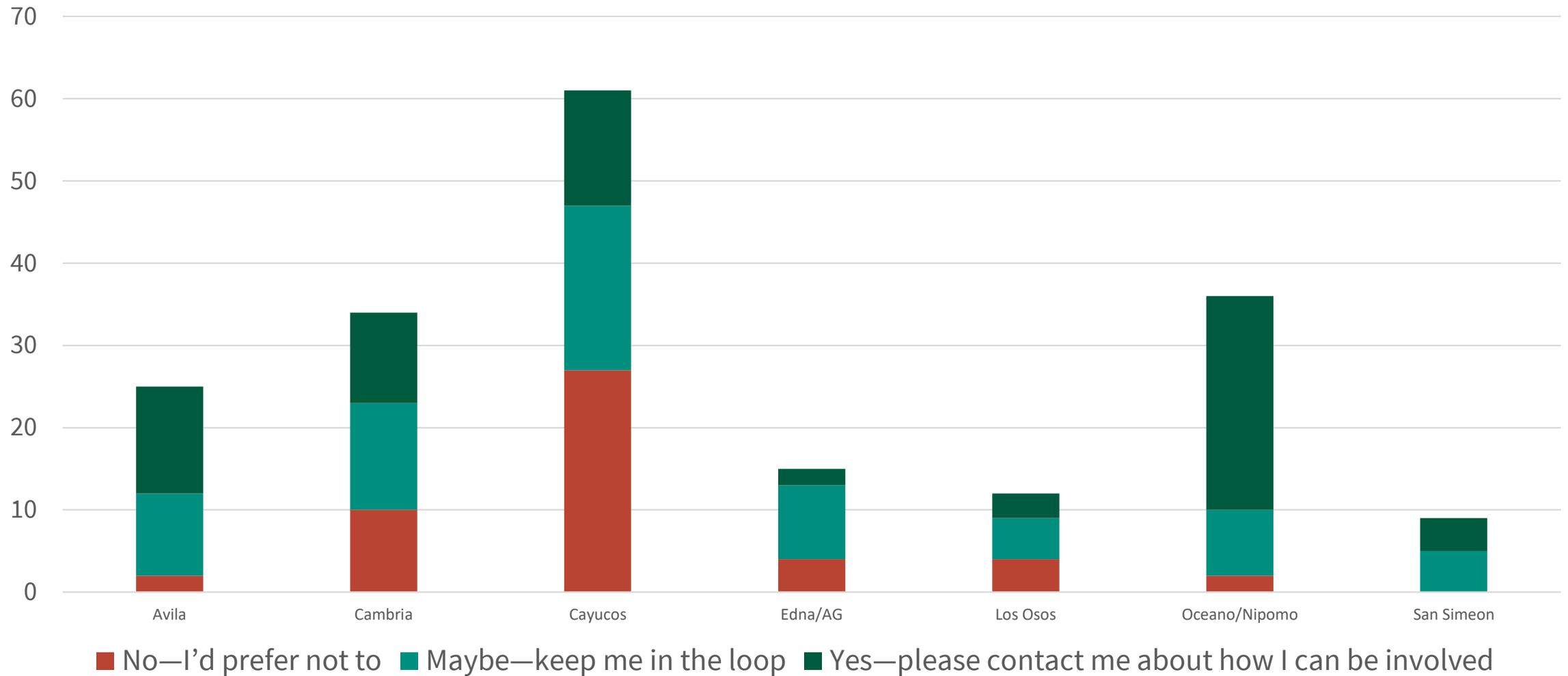
# HOW WOULD YOU PRIORITIZE THE OVERALL USE OF CBID FUNDS MOVING FORWARD?



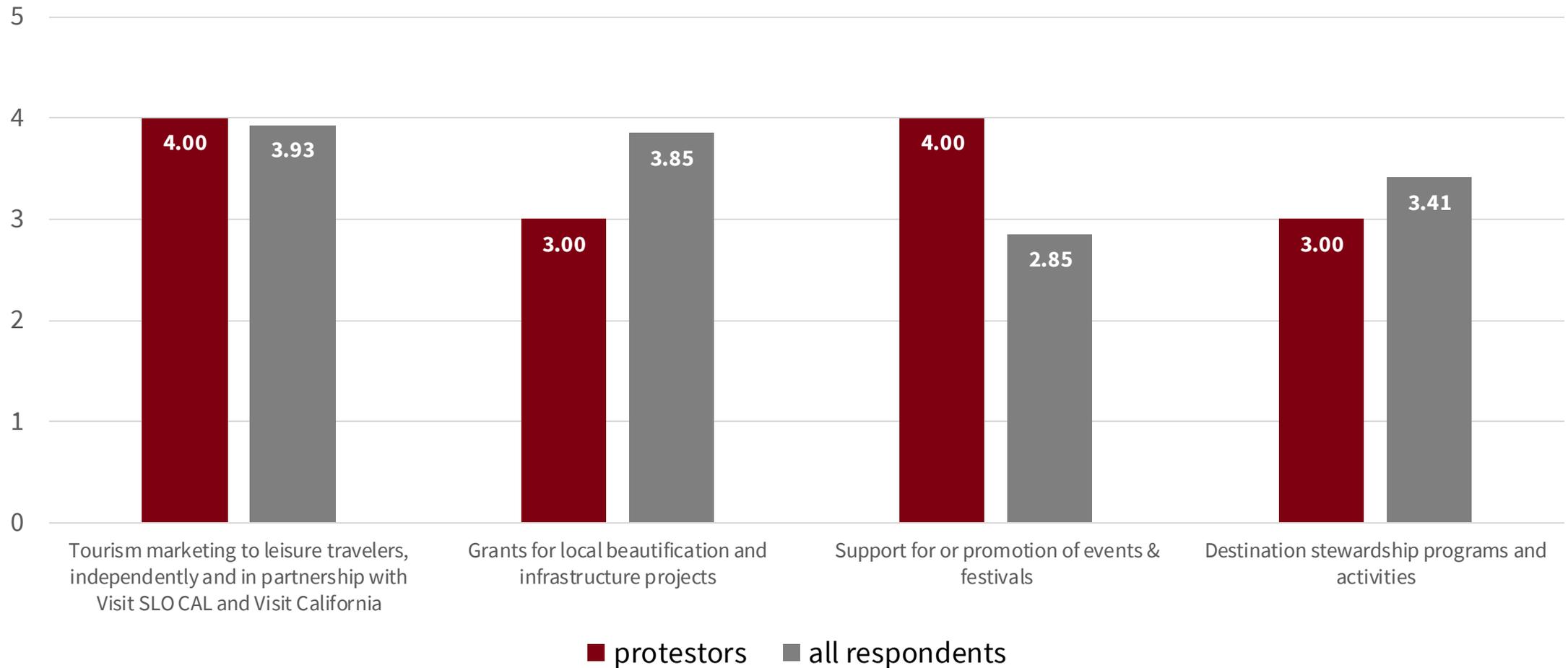
# RATE THE POSITIVE IMPACT YOU'VE SEEN FOR YOUR BUSINESS OR COMMUNITY FROM YOUR LOCAL TOURISM BOARD (5=HIGH IMPACT)



# WOULD YOU LIKE TO BE INVOLVED IN FUTURE CBID AND LOCAL TOURISM BOARD PLANNING OR ENGAGEMENT EFFORTS?



# PROTEST + LETTER-WRITING PROPERTIES: RATE THE POSITIVE IMPACT YOU'VE SEEN FOR YOUR BUSINESS OR COMMUNITY FROM THE CBID:



# HIGHLY ENGAGED RESPONDENTS: RATE THE POSITIVE IMPACT YOU'VE SEEN FOR YOUR BUSINESS OR COMMUNITY FROM THE CBID:

