

Oceano Dunes SVRA

Economic Impact Analysis Report 2010-2011

Final Report



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Table of Contents

Executive Summary	4
Project Overview	5
Section 1: Respondent Characteristics	9
1.1 Demographic Characteristics	9
1.2 Geographic Origin	10
Section 2: Respondent Trip Behavior	12
2.1 Visitor Type	12
2.2 Overnight Camping	12
2.3 Length of Stay	13
2.4 Non-In Park Camping	14
2.5 Travel Party Size	15
2.6 Presence of Children in Travel Group	16
Section 3: Activity Participation	17
3.1 Activity Participation within the Park	17
3.2 Activity Participation outside the Park	19
Section 4: Park Importance	20
Section 5: Travel Spending	21
5.1 Overall Travel Spending	21
5.2 In Park Revenue Capture	23
Section 6: Economic Impact	24
6.1 Economic Impact Results	24

List of Figures

Figure 1	Geographic Origin	10
Figure 2	Visitor Type	12
Figure 3	Camped in Park	12
Figure 4	Type of Camping in Park	13
Figure 5	Length of Stay	13
Figure 6	Non-In the Park Camping Lodging	14
Figure 7	Average Party Size	15
Figure 8	Average Party Size by Visitor Type	16
Figure 9	Percent of Groups with Children	16
Figure 10	Activity Participation within the Park	17
Figure 11	Activity Participation outside the Park	19
Figure 12	Would still Visit SLOC if No Oceano Dunes	20
Figure 13	Would still Visit SLOC if No Oceano Dunes By Visitor Type	20
Figure 14	Visitor Spending By Category by Percent	21
Figure 15	Visitor Spending By Category by Amount	22
Figure 16	In Park Revenue Capture	23

List of Tables

Table 1	Summary Demographic Characteristics	9
Table 2	California Market	11
Table 3	Visitor Markets by Mileage	11
Table 4	Activity Participation by Visitor Type	18
Table 5	Spending Category Elements	21
Table 6	Estimated Economic Impact	24
Table 6	Estimated Economic Impact by Top 5 Sectors	24
Table 7	Estimated Employment	25
Table 8	Estimated Employment by Top 5 Sectors	25
Table 9	State and Local Taxes	26
Table 10	Federal Taxes	27

Executive Summary

- The majority of respondents were White (71%), and a significant minority (22%) were Hispanic.
- Survey respondents were more likely to be married (60%). Significantly more men participated in the survey than women (76% and 24%, respectively).
- The average age of survey respondents was 37 years, with the median age at 35.9 years.
- The average household income of survey respondents was \$88,000.
- Almost all respondents lived in California (96%), and a significant percentage of these were from Southern California.
- 12% of respondents identified themselves as local residents, residing in San Luis Obispo County. Another 16% indicated they were day visitors from outside of San Luis Obispo County and 72% indicated they were overnight visitors from outside of San Luis Obispo County.
- 76% of the overnight visitors from outside San Luis Obispo County said they camped overnight in the Park (on the beach /campgrounds) on their last trip.
- The average length of stay of all respondents was 3.1 nights.
- The average party size of all respondents was 13 people.
- A full two-thirds (66%) of all respondents had children between the ages of 0 and 17 in their immediate Group, suggesting they believe the available activities are suitable for and have interest to family groups.
- Survey respondents were specifically asked if they would still visit San Luis Obispo County if the Oceano Dunes Park was not in existence. Two-thirds (67%) said they would not.
- Overall travel spending for all visitors to the Park during their visits was approximately \$1,544 per travel group.
- Survey respondents were asked how much of their total group expenditure was spent inside the Park itself; the average portion was \$235, representing 15% of an immediate travel party's total trip expenditure.
- The overall Economic Impact of visitors to the Oceano Dunes Park is estimated to be \$160M (This total includes Direct Spending, Indirect Spending and Induced Spending). Direct Spending alone is estimated at \$98M.
- Overall Economic Impact is estimated to be \$171M (Direct + Indirect + Induced Spending). Total economic impact by day visitors is estimated to be \$10.6m and overnight visitor impact was \$160.9M.

Project Overview

The Oceano Dunes State Vehicular Recreation Area (SVRA) provides an impressive playground for off-highway enthusiasts from all over the United States. The area is one of several OHV areas administered by the California Department of Parks and Recreation. Oceano Dunes also offers visitors other recreational activities such as swimming, kite surfing, personal watercraft and equestrian, surfing, surf fishing, camping, and hiking.

The area is located in the Southern part of San Luis Obispo County with excellent access via Highway 101 and serves a number of immediate cities within San Luis Obispo County, including Arroyo Grande, Pismo Beach, Grover Beach, Oceano and Shell Beach.



Oceano Dunes provides a venue for a significant number of California off road enthusiasts, including motorcycles and All Terrain Vehicles (ATV's). The area also serves a variety of swimmers, surfers, fishing and hiking enthusiasts.

Strategic Marketing Group (SMG) was retained to implement an Economic Impact Study. This project is designed to determine the economic impact of visitors to the Oceano Dunes State Vehicular Recreation Area (SVRA), on San Luis Obispo County and its local communities.

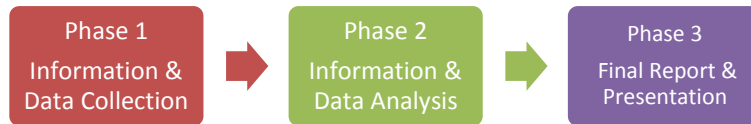
Project Objectives:

1. Collection of information regarding Oceano Dunes SVRA visitors, including point of origin, reason for visiting, length of stay and monies spent.
2. Measurement of the direct and indirect economic and employment impact of the Oceano Dunes SVRA on the San Luis Obispo County economy.

Scope of Work

The project included three phases with the specific project scope outlined below:

Oceano Dunes SVRA Project Scope



Phase 1: Information & Data Collection

This phase included the collection of visitor profile information from visitors to Oceano Dunes.

Phase 2: Information & Data Analysis

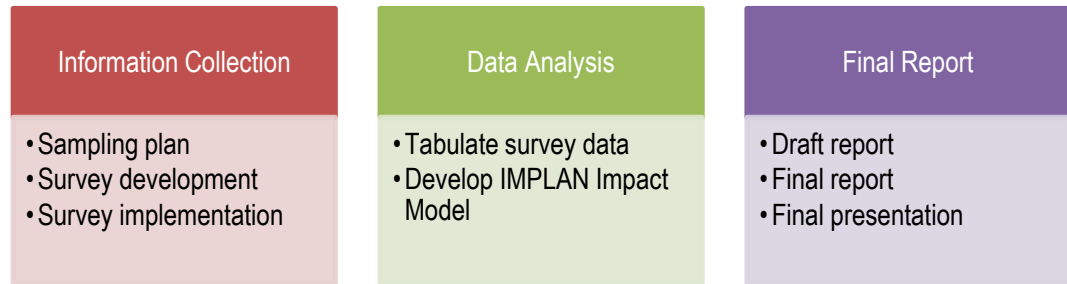
The collection of the information above in Phase 1 was analyzed in an effort to quantify direct visitor spending, the direct and indirect economic impacts, as well as job and tax creation for San Luis Obispo County.

Phase 3: Final Report Development & Presentation

The analyzed research information was organized and presented in this final report for purposes of management planning and decision making.

Methodology

The overall scope of work included the detailed methodology steps outlined below.



Phase I - Information Collection

Collecting Visitor Profile Information-Methodology

Data collection was done via a stratified representative sample of visitors to Oceano Dunes. In an effort to be as accurate as possible, SMG implemented an after trip telephone survey of visitors to Oceano Dunes. The survey included a methodology and a total of sixteen questions, approved by park staff.

Visitors were intercepted at the entrances to Oceano Dunes and asked by SMG staff if they would like to participate in a survey of their experiences and spending related to their visit. Those indicating a willingness to participate were given a form, soliciting basic information, including name, address and phone number. (See Appendix 1 for Sample Form). All participants were then entered into a data base and a random sample of those were chosen to participate in a follow-up telephone survey.

Data was collected in four phases:

- Phase 1: April 1-June 30, 2010
- Phase 2: July 1-September 30, 2010
- Phase 3: October 1-December 31, 2010
- Phase 4: January 1-March 31, 2011

Sample Size: SMG collected over 5,041 participation forms; 200 random surveys were completed per quarter, 800/annually. Based on the 800 completed surveys the confidence level is a minimum of 95% +/- 5%. A 95% confidence level with a 5 point margin of error means that the true answer lies between +/- 5 points from the percentage observed.

Phase 2- Data Analysis

SMG tabulated the collected information from Phase 1 above, analyzed the survey information and issued a top line report after each phase of data collection. Additionally SMG utilized the collected visitor data, park attendance information and Implan economic analysis software to develop economic impact, employment and tax projections.

Phase 3 - Final Report and Presentation Package

In this final phase, SMG developed the final report for California Department of Parks and Recreation.

Section 1: Respondent Characteristics

1.1 Demographic Characteristics

Survey respondents provided their gender, marital status, family status, age, annual household income, and ethnicity (See Table 1). Most respondents were white (71%) though (22%) were Hispanic. Survey respondents were likely to be married (60%). Significantly more men participated in the survey than women (76% and 24%, respectively).

Overall the average age of survey respondents was 37 years, with the median age at 35.9 years. Survey respondents tended to be younger, with the single largest segment of survey respondents in the 31-40 age segment, though (13%) of respondents were above 50 years of age. In terms of family status, (32%) of survey respondents indicated they had no children while (54%) indicated they had children at home.

The average annual household income of survey respondents was \$88,000. Fully 28% of those surveyed indicated they had a household income below \$50,000 and a similar 28% above \$100,000.

Table 1
Summary Demographic Characteristics

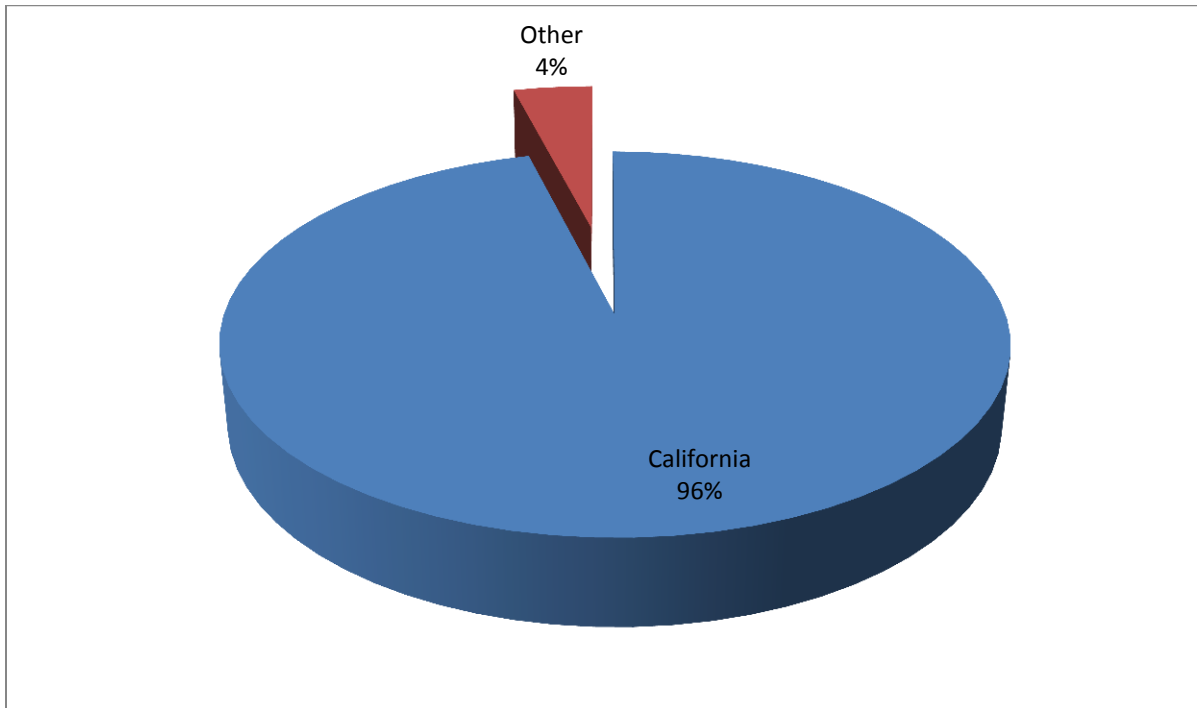
	Overall		Overall
Gender:		Household income:	
Male	76%	0–\$29,000	13%
Female	24%	\$30,000–39,999	8%
Marital Status:		\$40,000–49,999	7%
Single	36%	\$50,000–59,999	10%
Married	60%	\$60,000–69,999	8%
Living together	2%	\$70,000–99,999	21%
Widowed	1%	\$100,000–149,999	16%
Family Status:		\$150,000–200,000	8%
No children	32%	\$200,000-249,000	2%
Children at home	54%	\$250,000-349,000	1%
Empty nester	13%	\$350,000-499,999	1%
Age:		Average	\$88,000
Under 25	17%	Median	\$71,000
25-30	18%	Refused	5%
31-40	31%	Ethnicity:	
41-50	21%	White	71%
51-60	8%	African American	0%
Over 60	5%	Asian American	1%
Average	37	Hispanic/Latino	22%
Median	35.9	Native American	0%
		Other	4%
		No Answer	2%

*Numbers may not foot due to rounding.

1.2 Geographic Origin

Almost all (96%) of all respondents lived in California with a significant percentage from Southern California.

Figure 1
Geographic Origin



Over half of all respondents were from Southern California (56 %), 24% reside in the Central California Valley, and another 10% from the Bay Area.

Table 2
California Market

	% of Total	% of CA
Bay Area	10%	11%
	10%	11.00%
Sacramento	3%	3%
	3%	3.00%
Central Valley	24%	25%
	24%	25%
Southern California	56%	58%
LA Basin	9%	10%
Orange County/San Diego	3%	4.0%
Riverside/San Bernardino	4%	4.0%
Ventura/Santa Barbara	5%	5.0%
San Luis Obispo	14%	14%
Other	21%	21%

From a travel distance perspective, approximately 64% of total visitors surveyed live within 400 miles of the park and approximately 51% are within 200 miles, making the park a strong regional attraction.

Table 3
Visitor Markets by Mileage

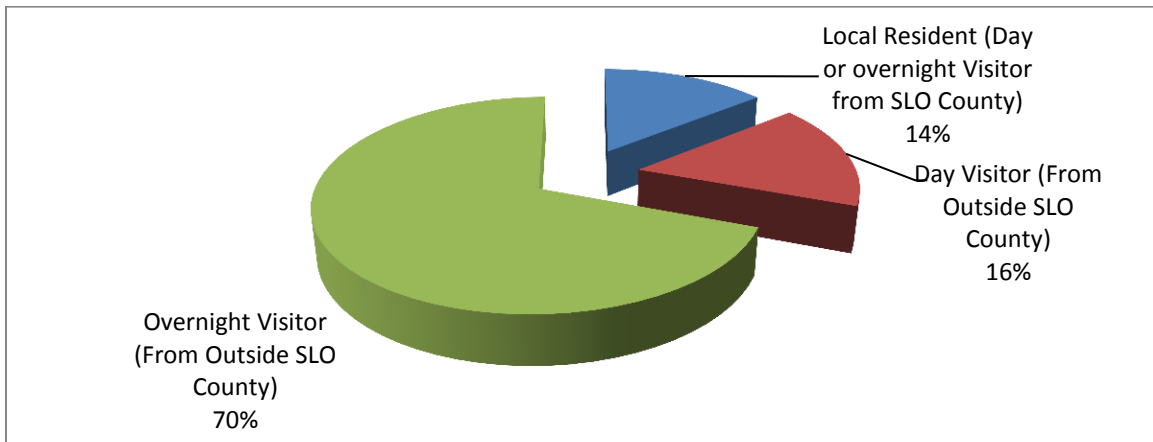
Market	Miles	% of Total Visitors	Cumulative
San Luis Obispo	<25	14%	
Ventura/Santa Barbara	56-120	5%	19%
LA Basin	121-200	9%	27%
Central Valley	121-200	24%	51%
Orange County/San Diego	200-400	3%	54%
Bay Area	200-400	10%	64%

Section 2: Respondent Trip Behavior

2.1 Visitor Type

Of those surveyed, 14% indicated they were local residents from San Luis Obispo County, visiting for the day or overnight, 16% indicated they were day visitors from outside San Luis Obispo County and 72% indicated they were overnights from outside San Luis Obispo County.

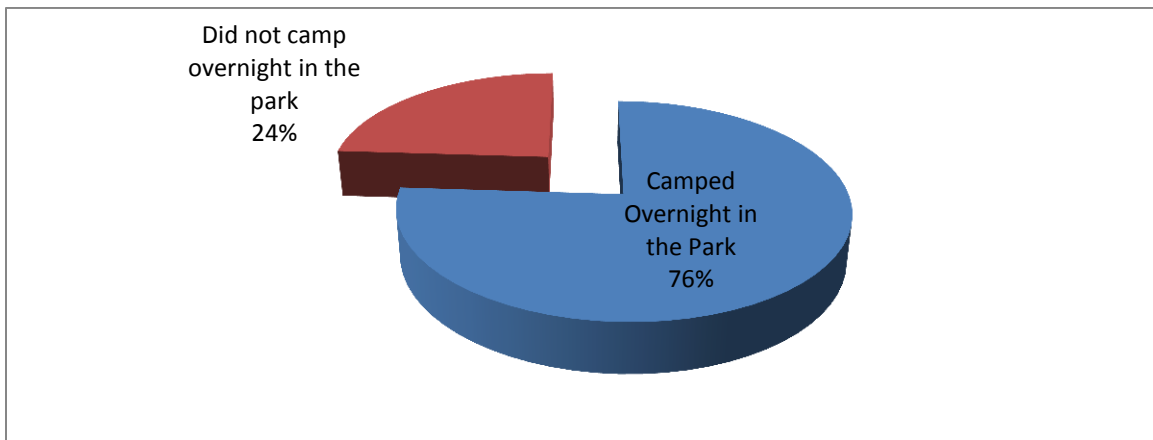
Figure 2
Visitor Type



2.2 Overnight Camping

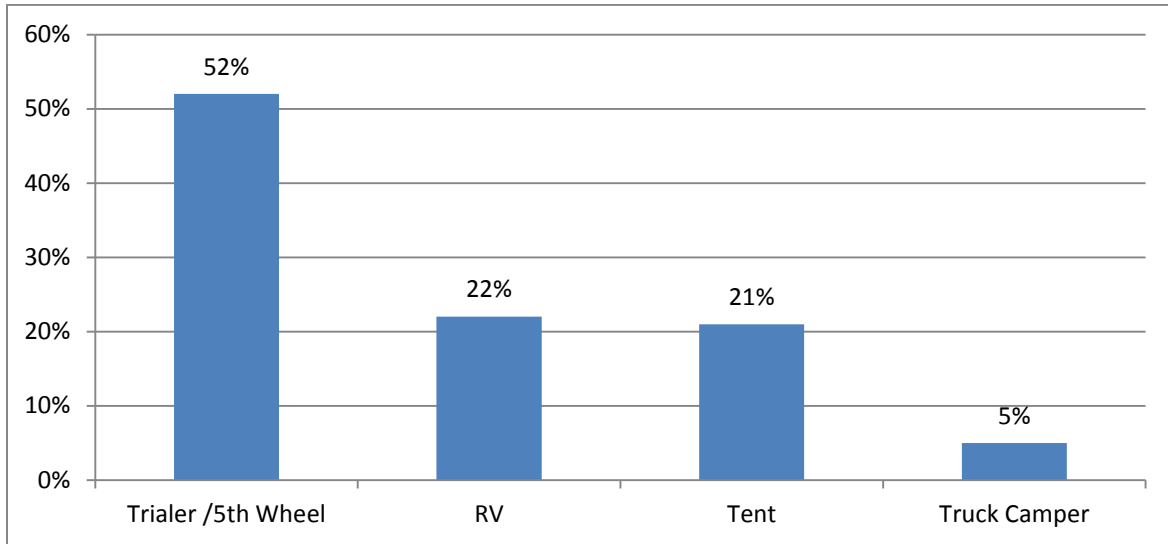
Of those who indicated they were overnight visitors from outside of San Luis Obispo County, 76% indicated they camped overnight in the park on their last trip. This ratio was fairly consistent throughout the twelve month study period.

Figure 3
Camped In Park
Base=Overnight Visitors



Of those who camped overnight within the park, over half indicated they did so in a trailer/fifth wheeler, followed by 22% in a recreational vehicle, while 21% indicated they were tent camping and 5% stayed in a truck camper.

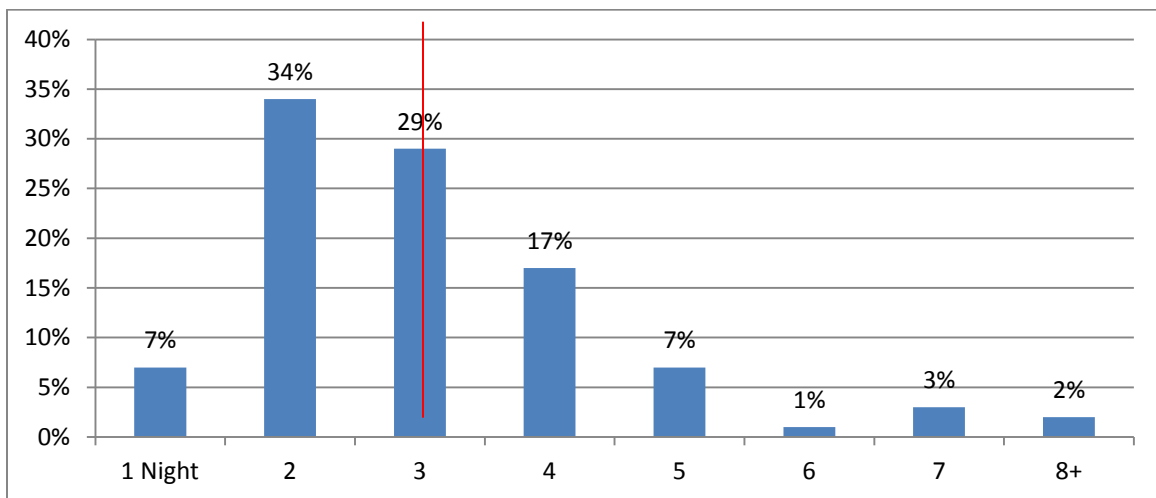
Figure 4
Type of Camping Within the Park
Base= Those who camped



2.3 Length of Stay

Of those overnight visitors surveyed who indicated they camped in the park, the average length of stay was 3.1 nights. The median length of stay was 3.0 nights.

Figure 5
Length of Stay
Base= Overnight camped in the park/campgrounds

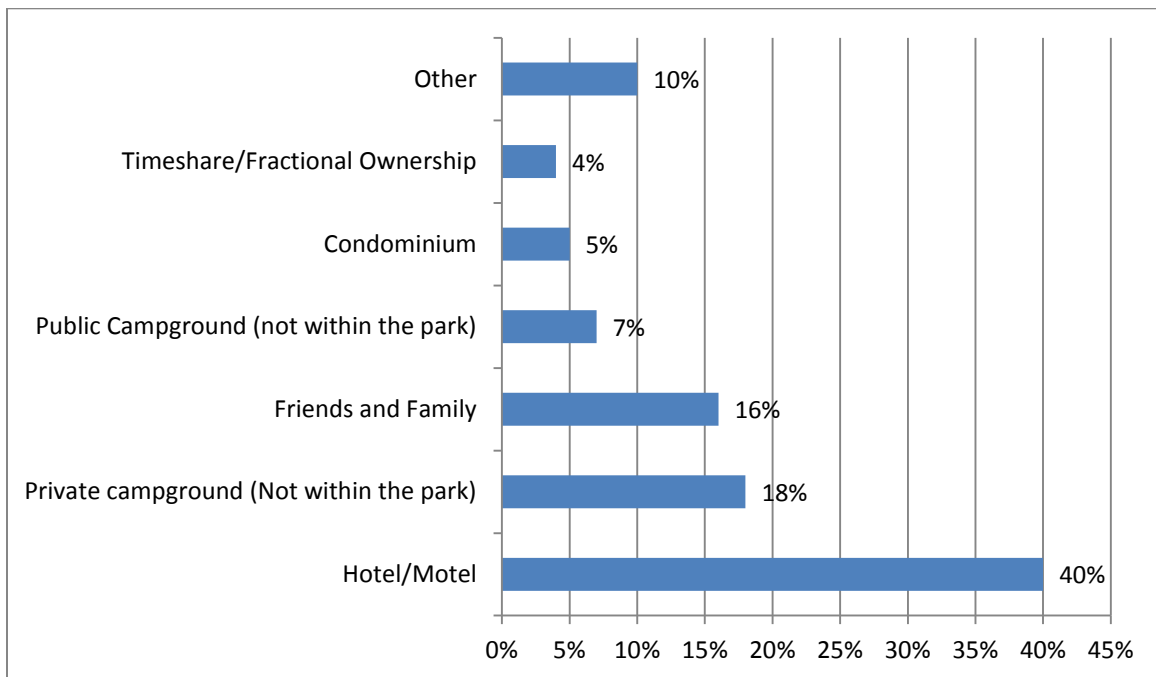


The highest concentration of visitation was two nights, which would tend to be consistent with the exhibited visitor pattern, of over half of those surveyed traveling from within 200 miles of the park.

2.4 Non-In the Park Camping/ Lodging

Of those overnight visitors indicating they did not camp within the park on their last trip, fully 40% indicated they stayed in a hotel or motel, 18% stayed in a private campground not within the park, 16% stayed with friends and family, 7% in a public campground not within the park, 5% in a condominium, 4% indicated they stayed in a fractional/timeshare property and the remaining 10% in some other type of accommodation.

Figure 6
Non-In the Park Camping Lodging

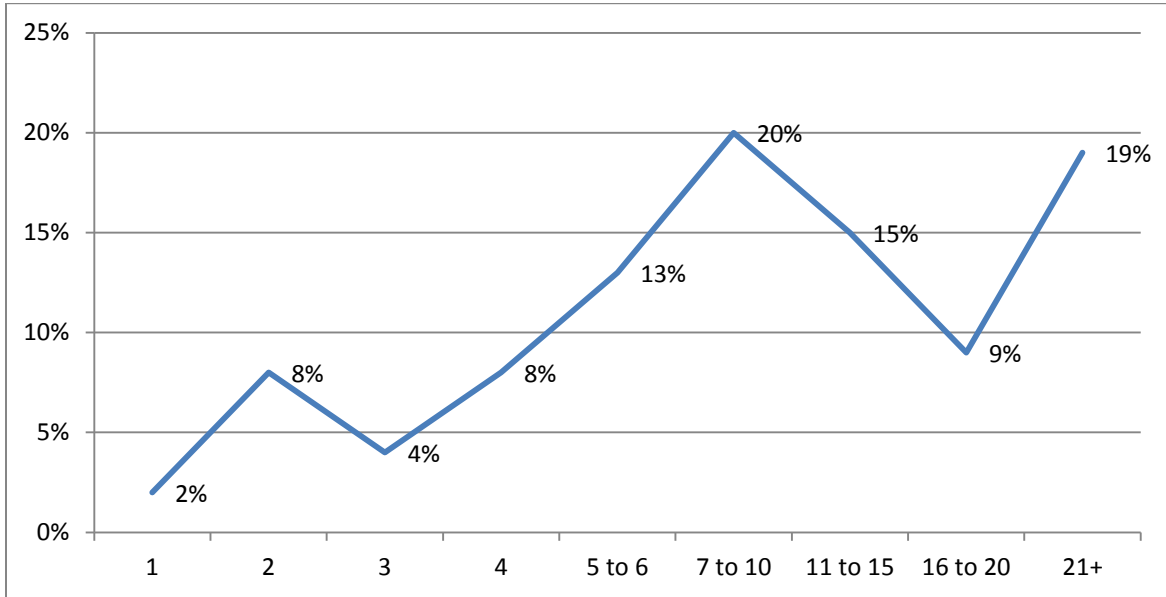


Of those overnight visitors who indicated they did not camp in the park the average number of nights they stayed in San Luis Obispo County was 2.7 just slightly under the stay of those who did camp “in the park”.

2.5 Number of People in Immediate Group

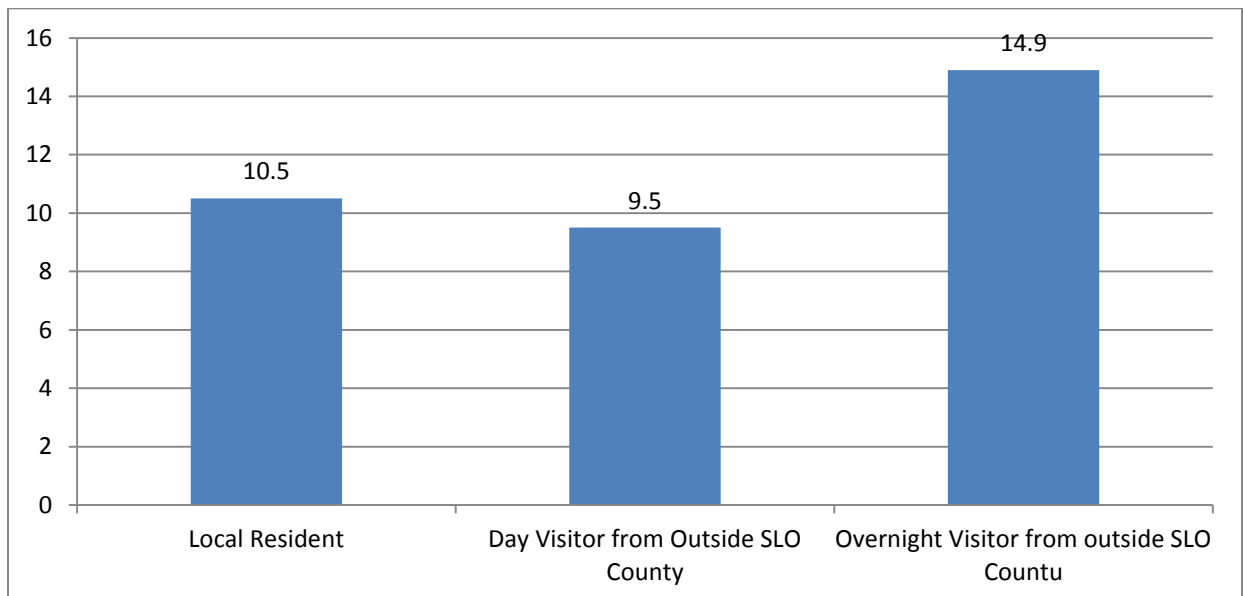
The number of people in an immediate group tended to be large with the average being 13 people, including any under the age of 18. This fact is reflective of a strong group travel dynamic to Oceano Dunes.

Figure 7
Average #in Immediate Group



The average # in the immediate group was highest among overnight visitors and lowest among day visitors from outside San Luis Obispo County.

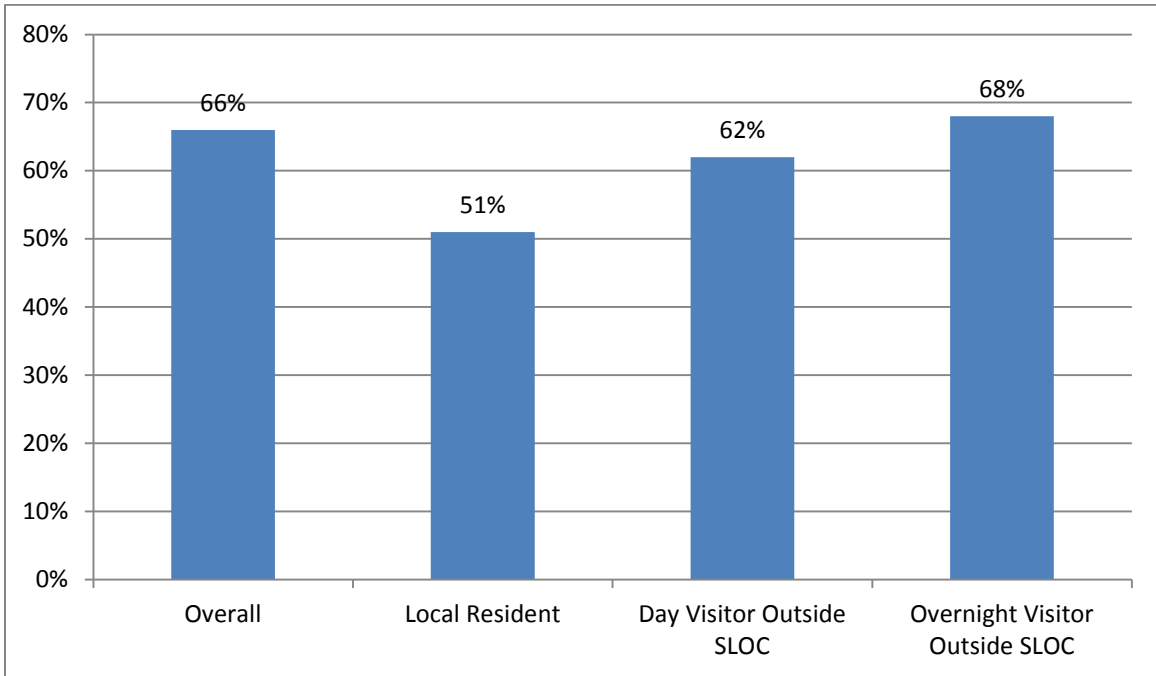
Figure 8
Average # in Immediate Group by Visitor Type



2.6 Presence of Children in Travel Group

Of those surveyed fully 66% indicated one or more children between the ages of 0 and 17 were in the immediate party, suggesting the available activities have a high interest among families. The percentage of groups with children was highest among those visitors (both day and overnight) from Outside of San Luis Obispo County.

Figure 9
Percent of Groups with Children

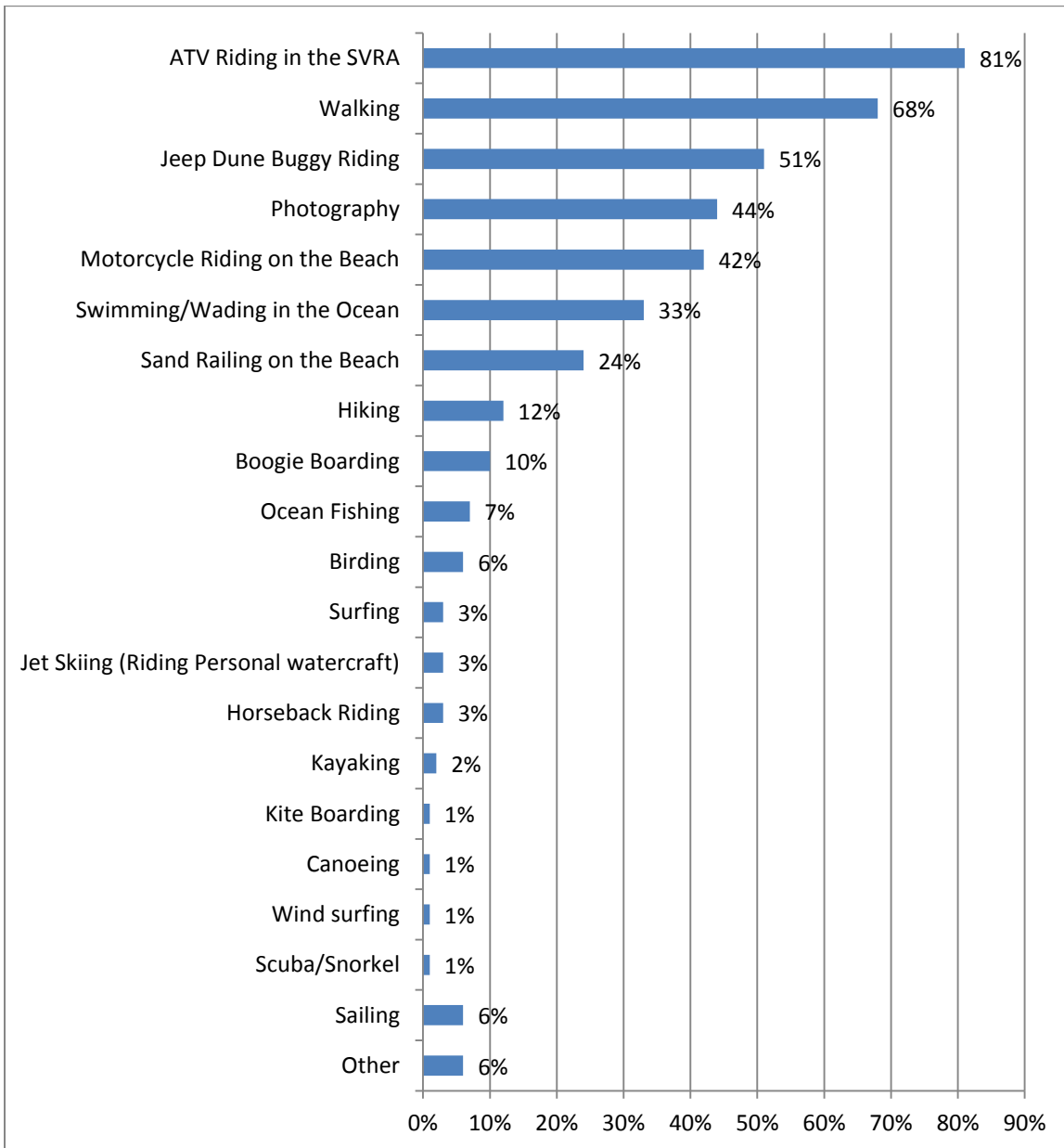


Section 3: Activity Participation

3.1 Activity Participation within the Park

As can be seen below in Figure 10, the activities survey respondents participated in while in the park include a wide variety of those both motorized and non-motorized. The most frequently mentioned activities included ATV riding, walking, jeep/dune buggy riding, photography and motorcycle riding on the beach.

Figure 10
Activity Participation within the Park



Activity participation varied by visitor type.

- As can be seen in Table 4 below, day and overnight visitors from outside the county were much more likely to be involved in ATV Riding in the SVRA.
- Local residents were more likely than visitors from outside the County to participate in such activities as hiking, boogie boarding, ocean fishing, surfing, kayaking and Kite boarding, but a still significant percentage of Locals also engaged in the motorized beach activities.
- Overnight visitors concentrated more heavily on ATV riding, Jeep dune buggy riding, motorcycle riding, and sand riling, all in the SVRA.

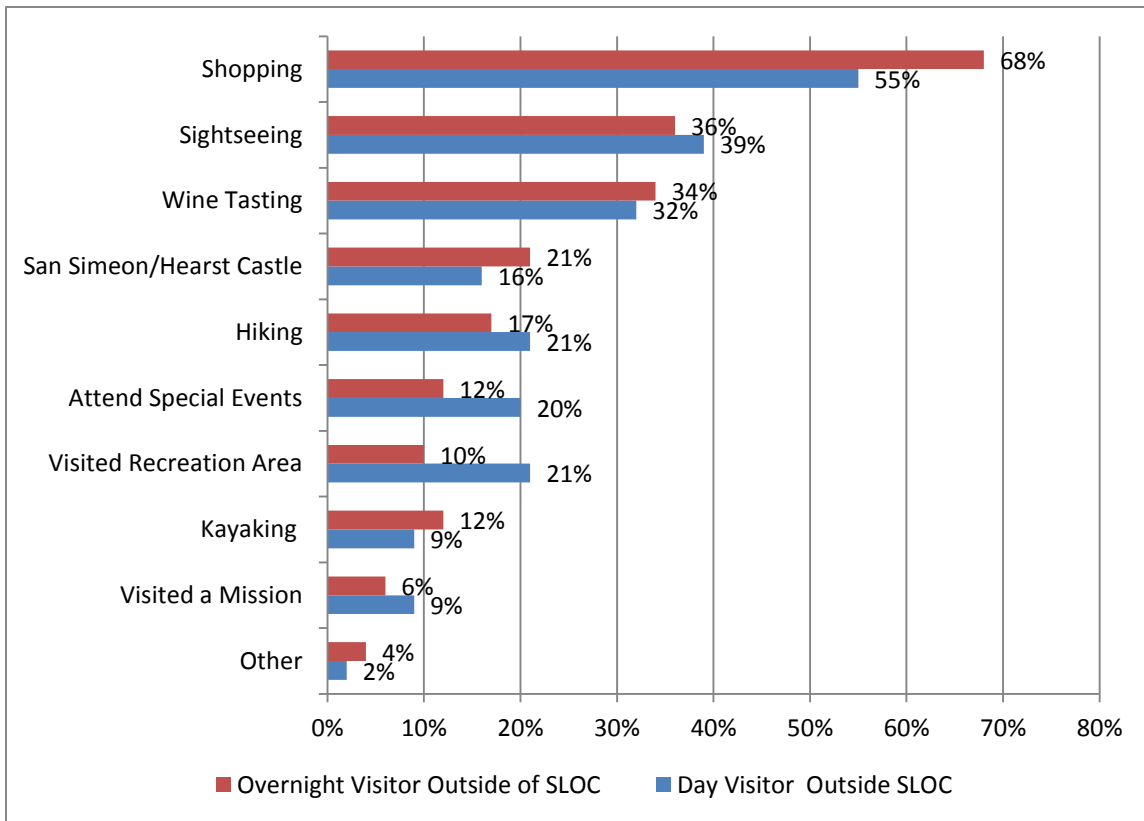
Table 4
Activity Participation by Visitor Type

Activity	Local Resident	Day Visitor Outside SLOC	Overnight Visitor Outside Sloc
ATV Riding on the Beach	56%	81%	85%
Walking	71%	60%	69%
Jeep Dune Buggy Riding on the Beach	54%	37%	54%
Photography	42%	36%	45%
Motorcycle Riding on the Beach	38%	38%	43%
Swimming/Wading in the Ocean	36%	30%	33%
Sand Railing on the Beach	26%	23%	32%
Hiking	40%	17%	22%
Boogie Boarding	18%	10%	11%
Ocean Fishing	18%	8%	9%
Birding	11%	9%	6%
Surfing	18%	8%	4%
Jet Skiing (Riding Personal watercraft)	7%	2%	3%
Horseback Riding	9%	3%	3%
Kayaking	10%	4%	2%
Kite Boarding	9%	2%	1%
Canoeing	3%	2%	1%
Wind surfing	3%	2%	0%
Scuba/Snorkel	3%	1%	0%
Sailing	4%	0%	0%
Other	8%	1%	5%

3.2 Activity Participation outside the Park

Visitors were asked if they participated in any activities outside the park and indicated that shopping, sightseeing and wine tasting were their most frequent activities.

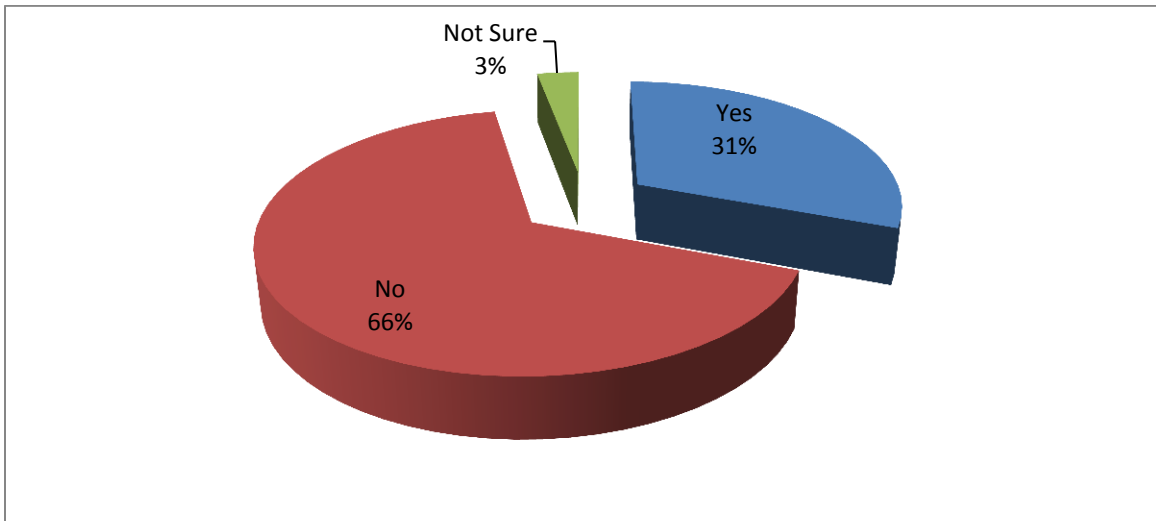
Figure 11
Activity Participation outside the Park
 Base = Visitors from Outside San Luis Obispo County



Section 4: Park Importance

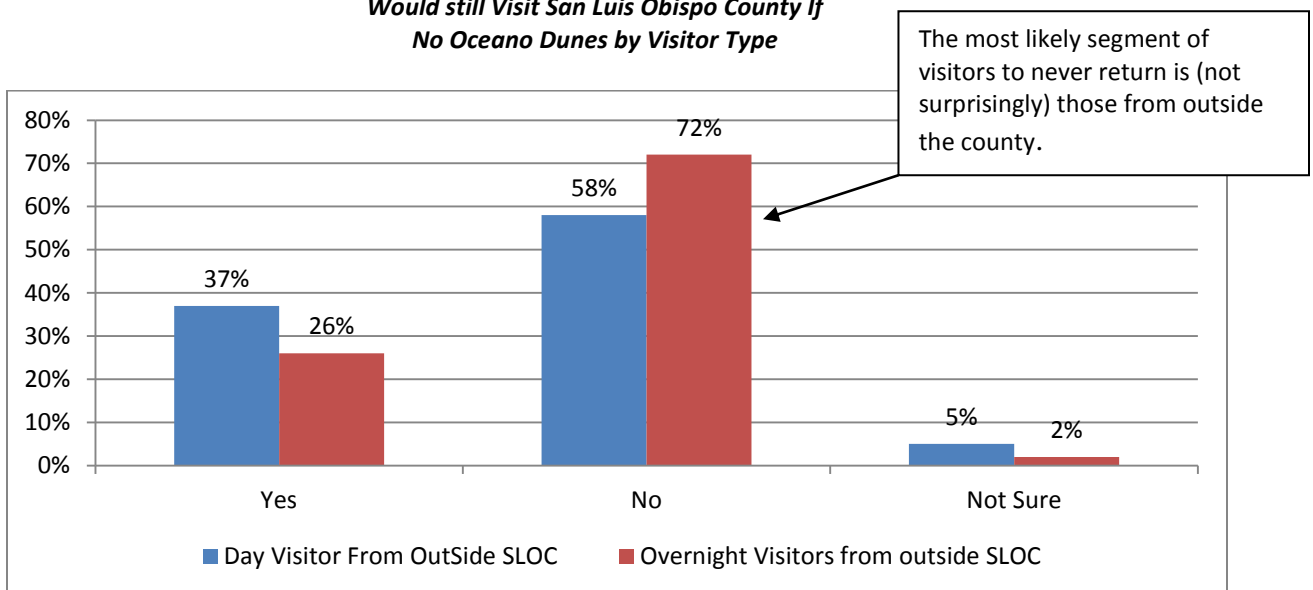
Survey respondents were asked if Oceano Dunes was not in existence, would they still visit San Luis Obispo County. Overall 67% indicated they would not visit the county, suggesting that Oceano Dunes, for them, provides a unique location and set of recreational experiences. As such the park is a “Revenue Driver” for the local tourism economy.

Figure 12
Would Still Visit San Luis Obispo County If No Oceano Dunes



Among visitors from outside San Luis Obispo County 26% of overnight and 37% of day visitors indicated they would still visit the County even if Oceano Dunes did not exist.

Figure 13
Would still Visit San Luis Obispo County If No Oceano Dunes by Visitor Type

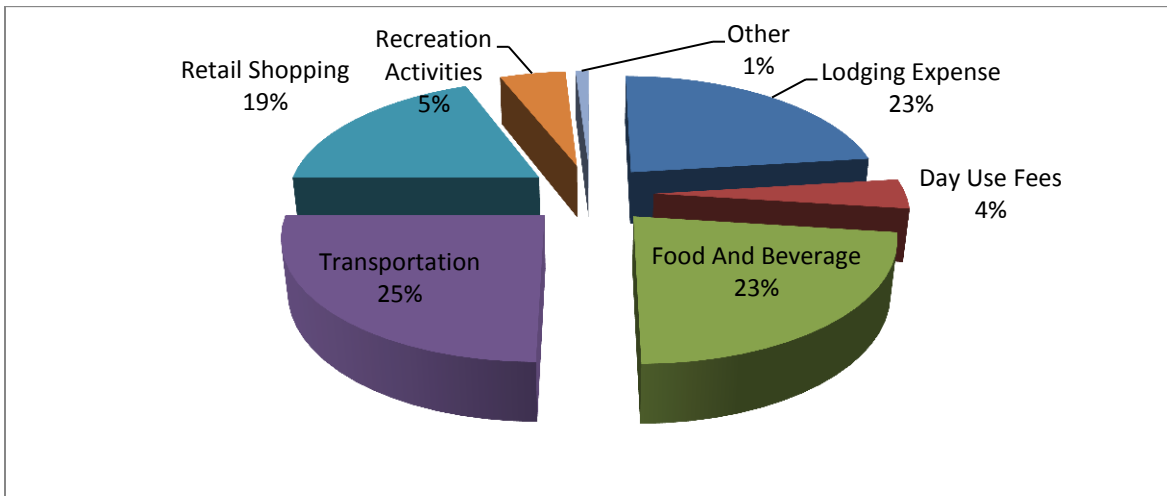


Section 5: Travel Spending

5.1 Overall Travel Spending

The survey asked respondents to estimate the amounts their group spent on various aspects of their visit. Note that Transportation, Food and Beverage and Lodging capture a significant percentage of the travel budget, approximately 71%.

Figure 14
Visitor Spending by Category Percent



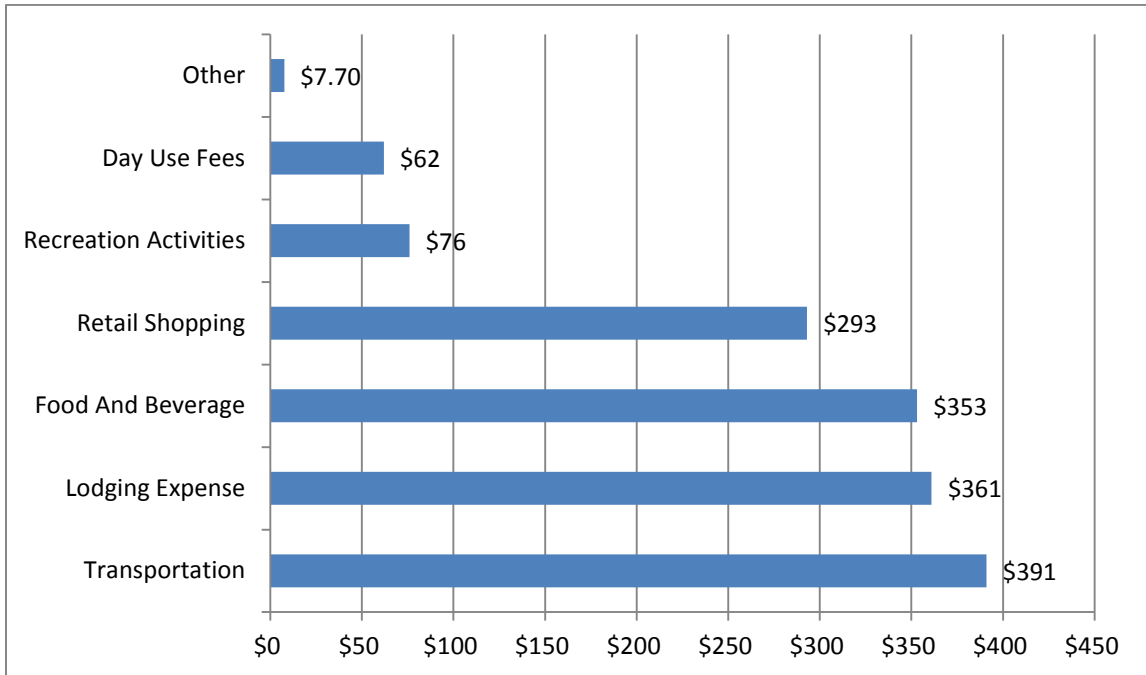
Spending category elements can be found below in Table 5.

Table 5
Spending Category Elements

Lodging expenses	Hotels/motels, bed & breakfast, campgrounds
Day Use Fees	Oceano Dunes SVRA
Food & beverages	Restaurants, bars
Transportation expenses	Gas, oil, repairs, parking fees, public transportation
Retail shopping	Souvenirs, gifts, film, bait, supplies, groceries, equipment purchases etc.
Recreation activities	Rentals, lessons, tours, guides, admission fees, cover charges, services, etc.
Any other expenses	Other Spending

In terms of visitor spending by each category, Figure 15 below identifies the average spending in each of the travel spending categories. Overall travel spending for all visitors to the park was approximately \$1,544 for each group.

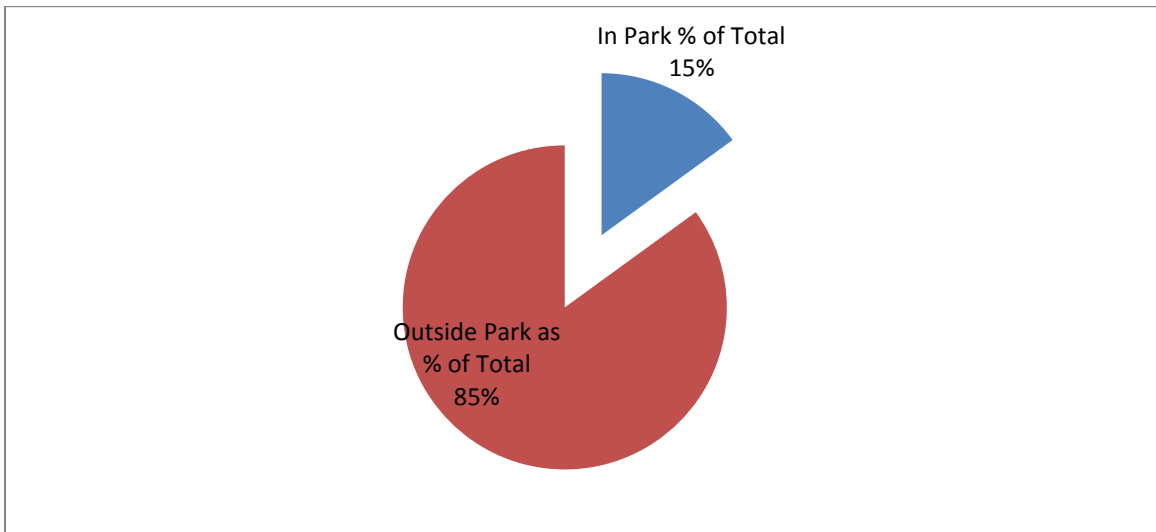
Figure 15
Visitor Spending by Category by Amount



5.2 In Park Revenue Capture

Survey respondents were asked how much of their total group expenditure was spent inside the park; the average amount was \$235, representing 15% of an immediate travel party's total trip expenditure.

Figure 16
In Park Revenue Capture



- Expenditures inside the park include the following: (ATV, Dune Buggy and Camping Trailer Rental; Yo Banana Boy pumping/fresh water service (firewood, ice and air);Towing/Escort, Finns restaurant, Pismo State Beach Golf Course)

Section 6: Economic Impact

6.1 Economic Impact Results

Developing the economic impact estimates includes utilizing the spending data and visitor type data captured in the survey with park attendance data provided by the park. That information is included in Implan Economic analysis and provides the following results. For more information on the economic impact methodology as well as a glossary of terms see Appendix 3 and 4 in the Appendix section of this report.

A. Total Output

Overall Economic Impact is estimated to be \$171M (Direct + Indirect + Induced Spending). Total economic impact by day visitors is estimated to be \$10.6m and overnight visitor impact was \$160.9M.

Table 6
Estimated Economic Impact

Total Impact:		Day Visitor Impact:		Overnight Visitor Impact:	
Direct Effect	\$105,201,315	Direct Effect	\$6,847,486	Direct Effect	\$98,353,829
Indirect Effect	\$31,820,148	Indirect Effect	\$1,592,281	Indirect Effect	\$30,227,867
Induced Effect	\$34,601,466	Induced Effect	\$2,233,400	Induced Effect	\$32,368,066
Total Effect	\$171,622,928	Total Effect	\$10,673,166	Total Effect	\$160,949,762

Table below identifies the five largest economic impact sectors for day, overnight and total visitor segments.

Table 7
Estimated Economic Impact by Top 5 Sectors

Total Economic Output-Top 5:	
Food services and drinking places	\$42,035,085
Accommodations	\$35,439,432
Retail Stores - General merchandise	\$9,129,003
Other- Real estate establishments	\$9,033,943
Other recreation industries	\$8,342,875
Day Visitor Economic Output-Top 5:	
Food services and drinking places	\$3,294,582
Retail Stores - Gasoline stations	\$1,320,500
Other recreation industries	\$1,013,902
Retail Stores - General merchandise	\$756,347
Real estate establishments	\$617,718
Overnight Visitor Economic Impact-Top 5:	
Food services and drinking places	\$38,740,503
Accommodations	\$35,439,300
Real estate establishments	\$8,416,225
Retail Stores - General merchandise	\$8,372,656
Other recreation industries	\$7,328,973

B. Employment

Overall employment generated is estimated to be 1,987 (Direct + Indirect + Induced Employment). Total employment generated by day visitors is estimated to be 125 and employment generated by overnight visitors, 1,861.

Table 8
Estimated Employment

Total Impact:		Day Visitor Impact:		Overnight Visitor Impact:	
Direct Effect	1,447.6	Direct Effect	94.6	Direct Effect	1,353.0
Indirect Effect	245.9	Indirect Effect	12.2	Indirect Effect	233.7
Induced Effect	294.0	Induced Effect	19.0	Induced Effect	275.0
Total Effect	1,987.5	Total Effect	125.9	Total Effect	1,861.6

Table 9 below identifies the five largest employment sectors for day, overnight and total visitor segments.

Table 9
Estimated Employment by Top 5 Sectors

Total Employment-Top 5:	
Food services and drinking places	1,340.1
Accommodations	861.0
Retail Stores - General merchandise	318.9
Other recreation industries	244.0
Real estate establishments	148.2
Day Visitor Employment-Top 5:	
Food services and drinking places	53.2
Other recreation industries	15.7
Retail Stores - General merchandise	13.4
Retail Stores - Gasoline stations	7.0
Museums, historical sites, zoos, and parks	6.2
Overnight Visitor Employment-Top 5:	
Food services and drinking places	625.6
Accommodations	430.5
Retail Stores - General merchandise	148.8
Other recreation industries	113.4
Real estate establishments	61.4

C. Tax Impact

It is estimated that approximately \$12.8M in both Local and State taxes are generated annually by visitors to the Oceano Dunes. (See below). Of that amount approximately \$9.2m are generated from indirect business taxes.

Table 10
State and Local Taxes

Description	Employee Compensation	Indirect Business Tax	Households	Corporations	Total
Dividends				\$780,300.00	
Social Ins Tax- Employee Contribution	\$116,604.00				
Social Ins Tax- Employer Contribution	\$289,629.00				
Indirect Bus Tax: Sales Tax		\$3,787,461.00			
Indirect Bus Tax: Property Tax		\$4,244,665.00			
Indirect Bus Tax: Motor Vehicle Lic		\$86,904.00			
Indirect Bus Tax: Severance Tax		\$1,459.00			
Indirect Bus Tax: Other Taxes		\$744,984.00			
Indirect Bus Tax: S/L NonTaxes		\$399,249.00			
Corporate Profits Tax				\$387,962.00	
Personal Tax: Income Tax			\$1,417,435.00		
Personal Tax: NonTaxes (Fines- Fees			\$429,419.00		
Personal Tax: Motor Vehicle License			\$66,298.00		
Personal Tax: Property Taxes			\$32,479.00		
Personal Tax: Other Tax (Fish/Hunt)			\$12,829.00		
Total State and Local Tax	\$406,232.00	\$9,264,722.00	\$1,958,460.00	\$1,168,262.00	\$12,797,676.00

Note: The tax estimates are based on the IMPLAN Social Account relationships. State and local taxes collected are not all retained by the county.

It is estimated that approximately \$13.2M in Federal taxes are also generated annually by the park’s visitors.

Table 10
Federal Taxes

Description	Employee Compensation	Proprietor Income	Indirect Business Tax	Households	Corporations	Total
Social Ins Tax- Employee Contribution	\$3,190,424	\$583,852				
Social Ins Tax- Employer Contribution	\$3,136,181					
Indirect Bus Tax: Excise Taxes			\$796,079			
Indirect Bus Tax: Custom Duty			\$257,555			
Indirect Bus Tax: Fed NonTaxes			\$683,469			
Corporate Profits Tax					\$945,625	
Personal Tax: Income Tax				\$3,590,427		
Total Federal Tax	\$6,326,605	\$583,852	\$1,737,103	\$3,590,427	\$945,625	\$13,183,612

Appendix

Appendix 1: Telephone Survey

Oceano Dunes OHV Economic Impact Survey

Final Approved

1. What is the zip code of your current, principal residence?

2. During your most recent trip were you

Local Resident (day or overnight visitor from within San Luis Obispo County) **Go to Q 8**

Day visitor from outside San Luis Obispo County (**Go to Q8**)

Overnight visitor from outside San Luis Obispo County (**Go to Q 3**)

-----Overnight Visitors-----

3. On your last overnight trip to Oceano Dunes did you camp overnight in the park?

Yes (**Go to Q4**)

No (**Go to Q6**)

4. If you were camping overnight in the park, what type of *overnight camping* were you doing? (Check one only)

Recreational vehicle

Tent camping

Trailer/5th wheel

Truck camper

5. How many nights did you stay in San Luis Obispo County on your last trip to visit Oceano Dunes?

Nights _____ (**Go to Q8**)

6. What type of lodging did you stay in while on your last trip to Oceano Dunes?

Hotel/Motel

Timeshare/Fractional Ownership

Condominium

Private Campground/RV (not within the park)

Public Campground/RV (within the park)

Friends & Family

Other

7. How many nights did you stay in San Luis Obispo County on your last trip to visit Oceano Dunes?

Nights _____

-----All Visitors-----

8. If Oceano Dunes was not in existence (no OHV riding, no camping, no trails, etc.) during your visit to the area, would you still visit San Luis Obispo County?

Yes

No

Not Sure

11A. To better understand the economic impact of visitors to Oceano Dunes SVRA on San Luis Obispo County we are interested in finding out the approximate amount of money you and other visitors in your immediate group spent in San Luis Obispo County during your most recent visit to Oceano Dunes SVRA. We understand that this is a difficult question, but please do your best because your responses are very important to our efforts. During your visit, what is the approximate amount your entire group spent in each of the following categories?

- A. Lodging expenses (hotels/motels, bed & breakfast, campgrounds) \$
- B. Day-use fees at Oceano Dunes SVRA \$
- C. Food & beverages at restaurants, bars \$
- D. Transportation expenses (gas, oil, repairs, parking fees, public transportation) \$
- E. Retail shopping (souvenirs, gifts, film, bait, supplies, groceries, equipment purchases etc.) \$
- F. Recreation activities (rentals, lessons, tours, guides, admission fees, cover charges, services, etc.) \$
- G. Any other expenses

Please specify \$

11B. Of the total amount you and your immediate party spent how much do you estimate you spent inside the park on the following: : (ATV, Dune Buggy and Camping Trailer Rental, Yo Banana Boy pumping/fresh water service, (firewood, ice and air)Towing/Escort, Finns restaurant, Pismo State Beach Golf Course)

\$ _____

12. Gender

- _____ Male
- _____ Female

13. What is your marital status?

- _____ Single
- _____ Married
- _____ Widowed
- _____ Living Together

14. Do you have children?

- _____ No children
- _____ Yes, Children at Home
- _____ Yes, Empty Nester

Appendix 2: Participation Form



Become eligible to win a free 3 days/ 2 night stay in San Luis Obispo County!

Oceano Dunes District Economic Impact Study Participation Form

**Please tell us about your experience at Ocean Dunes by participating in a
CONFIDENTIAL telephone survey.**

___ Yes, please contact me via telephone after my trip

Please complete the following contact information. At minimum a contact name and phone number is required.

Your information will be kept confidential and used for statistical purposes only!

*Name: _____

*Phone: Home: _____ Cell _____

Address: _____

City: _____ State: _____

Zip: _____

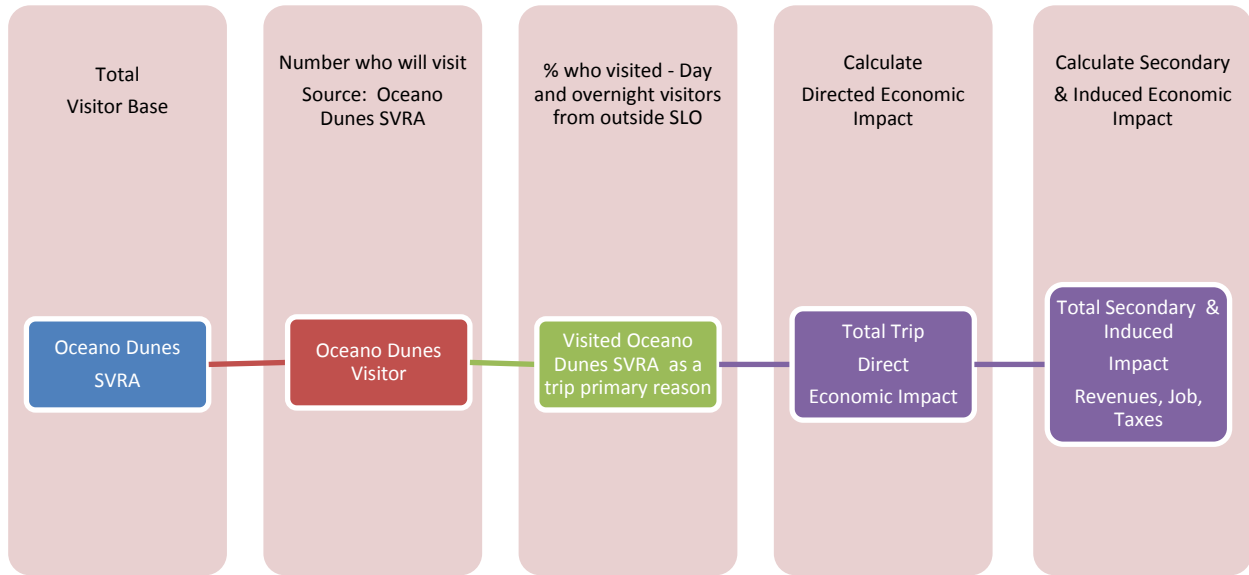
Your information will be kept confidential, your name will not be sold and the information you provide will be destroyed after it is tabulated assuring your confidentiality.

By participating you will be eligible to win a free 3 days/ 2 night stay in San Luis Obispo County!

Thank You!

Appendix 3: Economic Impact Methodology

The following is a methodology flow chart designed to identify the steps taken in the development of the analysis. Survey Data was used in conjunction with IMPLAN economic impact analysis software.



1. Attendance by Month

Wave 1:	
April	73,295
May	135,602
June	139,887
Wave 2:	
July	264,985
August	202,424
September	138,879
Wave 3:	
October	97,995
November	134,274
December	77,437
Wave 4:	
January	94,436
February	92,382
March	73,050
Total	1,524,646

2. Eliminate local in county residents 12%

$$1,524,645 \times 88\% = 1,341,687$$

3. Determine the number of travel party's

$$1,341,867 / 13 \text{ people per party} = 103,206$$

4. Travel Group Trip Expenditure by Category

Lodging expenses	\$361
Day Use Fees	\$62
Food & beverages	\$353
Transportation expenses	\$391
Retail shopping	\$293
Recreation activities	\$76
Any other expenses	\$7
Total	\$1544

**Numbers may not foot due to rounding*

Appendix 4- Glossary of Terms

Glossary of Terms

Indirect Impact-Additional impacts caused by industries purchasing from industries in I/O analysis.

Induced Impact-The impacts of household expenditures in I/O analysis.

Direct Impact-The set of expenditures applied to the predictive model (i.e., I/O multipliers) for impact analysis

Indirect Taxes- Sales, excise and other taxes paid during normal operation of industry. This does not include taxes paid based on net income.

Output-Output represents the value of industry production. In IMPLAN these are annual production estimates for the year of the data set and are in producer prices. For manufacturers this would be sales plus/minus change in inventory. For service sectors production = sales. For Retail and wholesale trade, output = gross margin and not gross sales.

Indirect Business Tax-IBT can currently be considered the combination of excise, sales and property taxes, as well as, fees, fines, licenses and permits.

Employee Compensation-Employee Compensation in IMPLAN is the total payroll cost of the employee paid by the employer. This includes, wage and salary, all benefits (eg, health, retirement, etc) and employer paid payroll taxes (e.g. employer side of social security, unemployment taxes, etc).

Households-Residents of the study area. Final users of nondurable goods & services. One of several institutions in IMPLAN.

Corporations-A corporation is a legal entity, created for the purpose of producing goods or services for the market, that may be a source of profit or other financial gain to its owner(s); it is collectively owned by shareholders who have the authority to appoint directors responsible for its general management. (SNA)