

Oceano Dunes District-California State Parks

Economic Impact Analysis Report 2016/17



This page left blank.

Table of Contents

Project Overview	5
Executive Summary	9
Section 1: Respondent Characteristics	11
1.1 Demographic Characteristics	11
1.2 Geographic Origin (Current Principle Residence)	14
Section 2: Respondent Trip Behavior	18
2.1 Visitor Type	18
2.2 Overnight Camping	18
2.3 Length of Stay	19
2.4 Non-in District (Oceano Dunes) Camping	20
2.5 Travel Party Size	21
2.6 Presence of Children in Travel Group	22
Section 3: Activity Participation	23
3.1 Activity Participation within the District	23
3.2 Activity Participation outside the District	26
Section 4: Oceano Dunes SVRA Importance	27
Section 5: Travel Spending	28
5.1 Overall Travel Spending	28
5.2 In District Revenue Capture	29
Section 6: Economic Impact	30
A. Total Output	30
B. Employment	31
C. Tax Impact	34
Glossary of Terms	35
Appendix	36
Appendix 1: Email Survey	37
Appendix 2: Participation Form	45
Appendix 3: Economic Impact Method	46

List of Figures

Figure A	Regional Overview of the Park District Location	5
Figure B	Southern California Proximity to Oceano Dunes	6
Figure C	California Visitor Market by Region	16
Figure 1	Survey Respondent Ethnicity	11
Figure 2	Survey Respondent Age	12
Figure 3	Survey Respondent Household Income	12
Figure 4	Current Principle Residence	14
Figure 5	Visitor Type	18
Figure 6	Camped in District	18
Figure 7	Type of Camping in District	19
Figure 8	Length of Stay	19
Figure 9	Non-in the District Lodging	20
Figure 10	Average Party Size	21
Figure 11	Average Party Size by Visitor Type	21
Figure 12	Percent of Groups with Children	22
Figure 13	Activity Participation within the District	23
Figure 14	Activity Participation within the District By Visitor Type	24
Figure 15	Activity Participation Outside the District	26
Figure 16	Would still Visit SLOC if No Oceano Dunes	27
Figure 17	Would still Visit SLOC if No Oceano Dunes By Visitor Type	27
Figure 18	Visitor Spending Category by Percent	27
Figure 19	Visitor Spending by Category and Amount	29
Figure 20	In-District Revenue Capture	29
Figure 21	Estimated Economic Impact	30
Figure 22	Estimated Overall Economic impact by Top-5 Sectors	31
Figure 23	Estimated Overall Employment	32
Figure 24	Top 5 Largest Employment Sectors	33

List of Tables

Table 1	Summary Demographic Characteristics	13
Table 2	California/Nevada/Arizona Market	15
Table 3	Visitor Market by Mileage	17
Table 4	Top Five Activities by Segment	26
Table 5	Spending Category Elements	28
Table 6	Estimated Economic Impact	30
Table 7	Estimated Economic Impact by Top 5 Sectors	31
Table 8	Estimated Employment	32
Table 9	Estimated Employment by Top 5 Sectors	33
Table 10	State and Local Taxes	34

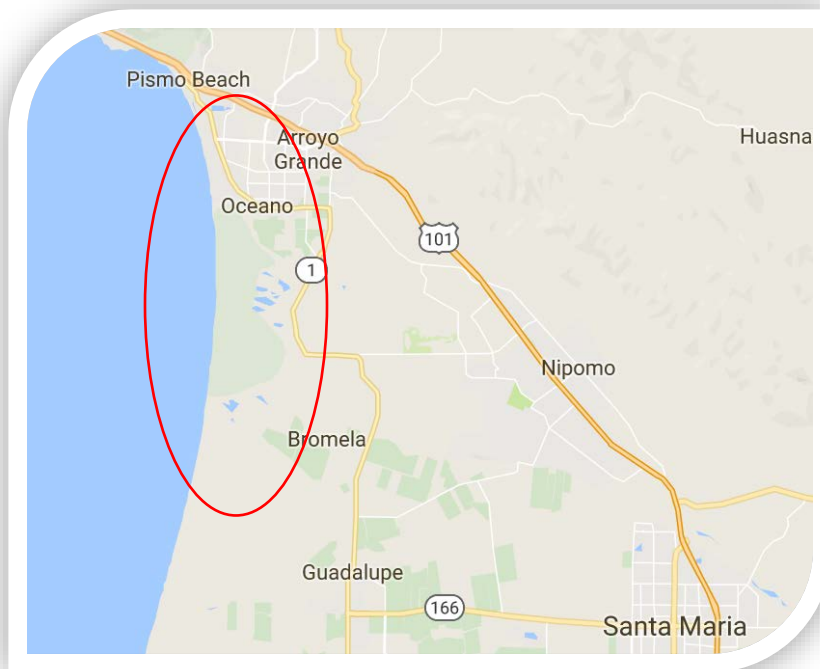
Project Overview

The Oceano Dunes District of California State Parks includes the Oceano Dunes State Vehicular Recreation Area (SVRA) and Pismo State Beach. These parks provide a unique experience for beach camping, off-highway vehicle and personal watercraft recreation and a diverse variety of passive recreational opportunities enjoyed by visitors from all over the State of California as well as the United States. The Oceano Dunes SVRA is one of nine OHV areas administered by the California Department of Parks and Recreation as part of the California Off-Highway Vehicle Program. Oceano Dunes is the only park that offers visitors a shoreline camping and OHV experience alongside the Oso Flaco Natural Area, as such, it could be considered one of the most unique OHV experiences in California.

Pismo State Beach offers two very popular developed beach access campgrounds, the Monarch Butterfly Grove, Pismo Lakes, Grand Dunes, Pismo Nature Preserve and the new Oceano Dunes District Visitor Center. These parks are an integral part of activities available in San Luis Obispo County,

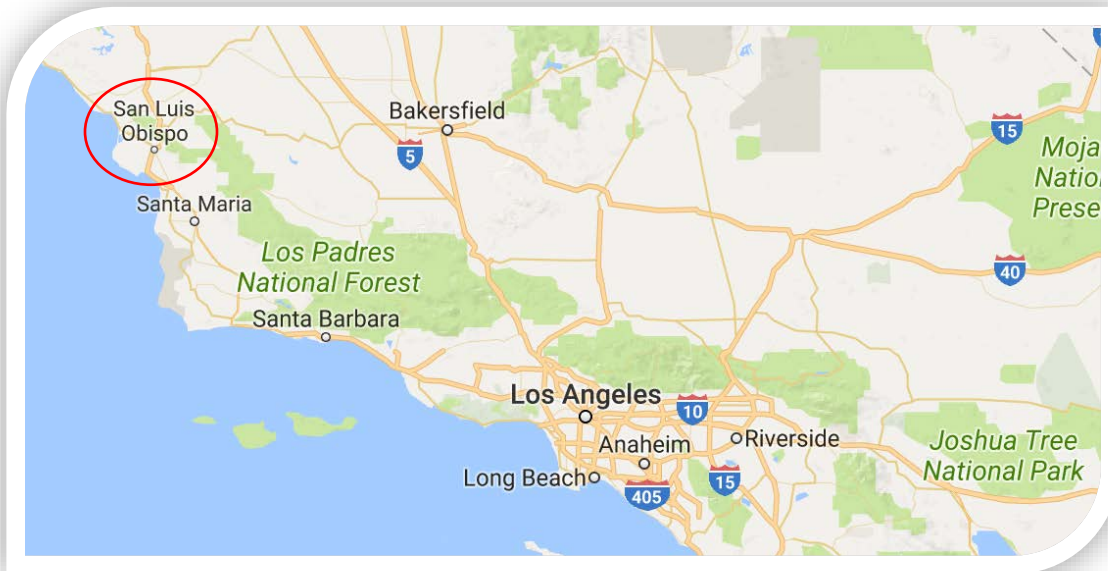
The District is located in the southern part of San Luis Obispo County with excellent access via Highway 101 and serves a number of immediate cities within the County including Arroyo Grande, Pismo Beach, Grover Beach, Oceano and Shell Beach.

Figure A: Regional Overview of the Park District Location



From a broader access perspective, the area has excellent access from Southern California via Highway 101 and the Central Valley via Highway 166 and 41, and 58 and to a lesser degree Northern California via Highway 101 and Highway 1.

Figure B: Southern California Proximity to Oceano Dunes District



Oceano Dunes District provides a venue for a significant number of California OHV enthusiasts including motorcycles, side by sides and All-Terrain Vehicles (ATV's). Additionally, the area serves a variety of outdoor recreation enthusiasts including swimmers, surfers, anglers, kite boarders, personal watercraft, dog walkers and hikers.

SMG Consulting was retained to implement an Economic Impact Report. This project is designed to determine the economic impact of visitors to the Oceano Dunes District of State Parks on the local San Luis Obispo County.

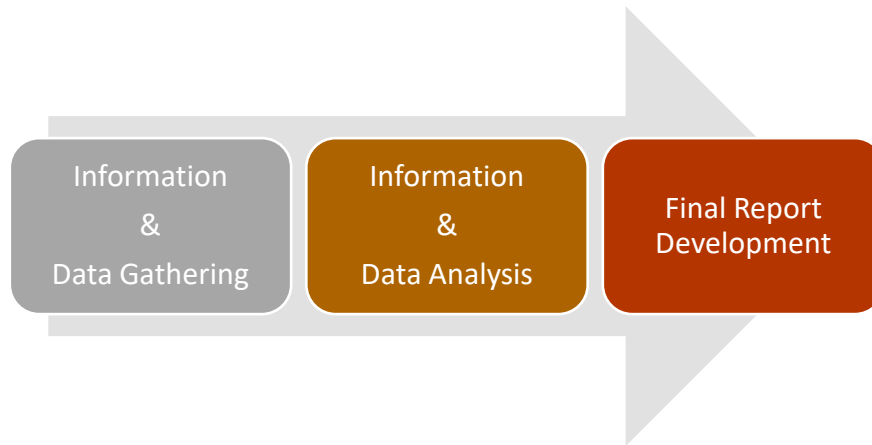
Project Objectives:

1. To collect information regarding Oceano Dunes District visitors including point of origin, reason for visiting, length of stay and visitor spending.
2. Measure the direct, indirect, induced economic and employment impact of the Oceano Dunes District on the San Luis Obispo County economy.

It should be noted that this study had a slightly different methodology (than past studies) in that information was collected from visitor's district wide and not just those visiting the SVRA. This is an effort to get a broader understanding of the economic impact throughout the district.

Oceano Dunes District Project Scope

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



Phase 1: Information & Data Collection

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

Phase 2: Information & Data Analysis

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

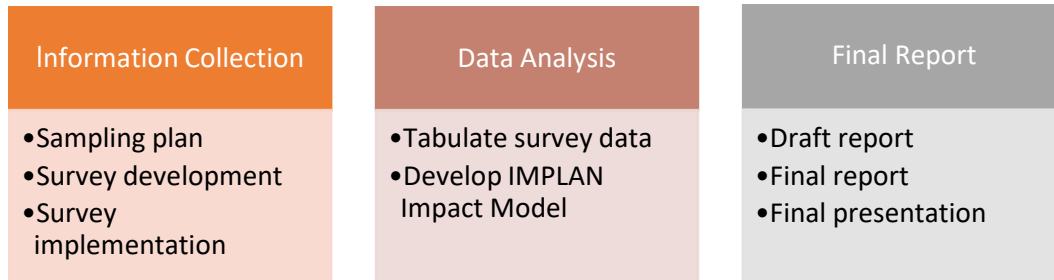
Phase 3: Final Report Development

The analyzed research information was organized into this final report for management planning.



Methodology

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



Phase I - Data and Information Collection

Collecting Visitor Profile Information-Methodology

Data collection was done with a stratified representative sample of visitors to Oceano Dunes District. In an effort to be as accurate as possible SMG implemented a post-trip email survey of visitors to the Oceano Dunes District. The survey included a total of 16 questions and methodology that was approved by District staff.

Visitors were intercepted at the entrances to Oceano Dunes District Parks and were asked by SMG Consulting Staff if they would like to participate in a survey of their experiences and spending related to their visit. Those that indicated they would participate were given a form that solicits basic information including name address and email address. (See Appendix 1 for Sample Form). All those that agreed to participate were entered into a database and were sent an email survey as a follow-up to their visit.

Data was collected monthly from July 2016 through September 2017.

Sample Size: SMG collected over 3,850 participation forms of which there were 909 completed email surveys, a response rate of 24%. Those participating in the survey were provided an opportunity to win a gift card as an incentive to participate. The survey was resent to minimize non-response. Based on 909 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

With the collected information from Phase 1 above, SMG tabulated, and analyzed the collected survey information and SMG utilized the collected visitor data, District 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.



Executive Summary

The following is a summary of major findings in the study.

DEMOGRAPHICS

- Respondents were primarily **White (57%)**, and **(27%) were Hispanic**.
- Survey respondents were likely to **be married (68%)**. Men accounted for 51% of the response and women 49% respectively.
- Overall the average age of survey respondents was **42.2 years**, with the **median age of 40.6 years**.
- The average household income of survey respondents was **\$115,000**.

GEOGRAPHIC ORIGIN

- Almost all **(96%) respondents lived in California** with a significant percentage from the Central Valley. Additional visitors were from the Central Coast followed by Southern California and Northern California respectively.

- Of those surveyed, **15% indicated they were local residents** from San Luis Obispo County. Twelve percent (12%) indicated they were day visitors from outside of San Luis Obispo County, and **73% indicated they were overnight visitors from outside of San Luis Obispo County.**

LENGTH OF STAY/PARTY SIZE

- Of those visitors that indicated they were overnight visitors from outside of San Luis Obispo County, **84% indicated they camped overnight in the District** on their last overnight trip to the parks.
- Of those surveyed, the average length of stay was **3.1 nights.**
- Of those surveyed, the average party size was **11.4 people.**
- Of those surveyed, **73% indicated that children between the ages of 0 and 17 were within the immediate party,** suggesting the available activities have a high interest among families.
- Survey respondents were asked if Oceano Dunes SVRA were not in existence, would they still visit San Luis Obispo County. **Overall, 62% indicated they would not visit the county, with 18% indicating they were not sure.**



TRAVEL SPENDING

- Overall travel spending for all visitors to the District was approximately **\$1,389 for each travel party.**
- Survey respondents were asked how much of their total group expenditure was spent inside the District. The average amount was \$249 which represents 18% of an immediate travel party's total trip expenditure.
- **Direct travel spending is estimated to be \$158M from visitors outside San Luis Obispo County. Overall economic impact is estimated to be \$243M which is based on Direct Spending, Indirect Spending and Induced Spending from visitors outside of San Luis Obispo County.**
- **This is an increase from \$171M identified in a similar study conducted in 2010/11.¹**
- **Based on the IMPLAN Analysis, it is estimated that 3,300 jobs were generated as a result of the travel spending,**
- **This is an increase from the 2010/11 study of 1,987 jobs generated.²**
- District visitors generated approximately **\$1.9M in state and local taxes.**
- **Overall accommodation totaled \$45M in expenditures.**

¹ NOTE: The study in 2010/11 was conducted on the SVRA portion of visitors, as such this study is more robust as it includes visitors throughout the District. Comparisons are made where appropriate and are noted.

² Ibid



ACTIVITIES

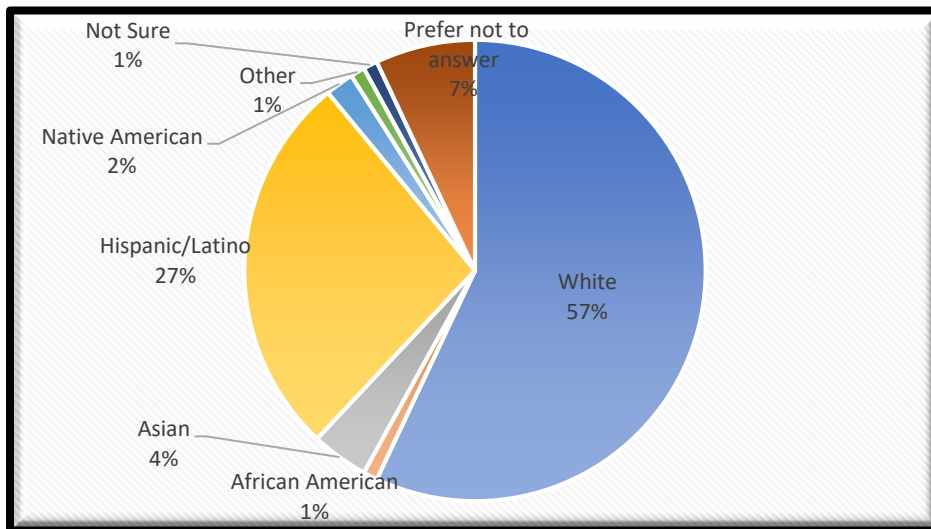
- The top three activities survey respondents participated in within the District were **ATV Riding (62%)**, **enjoying a beach bonfire (57%)** and **enjoying the sunsets (56%)**.
- The top three activities those surveyed enjoyed outside the District were **shopping (56%)**, **sightseeing (33%)**, and **visiting another recreation area or beach within the region (25%)**.

Section 1: Respondent Characteristics

1.1 Demographic Characteristics

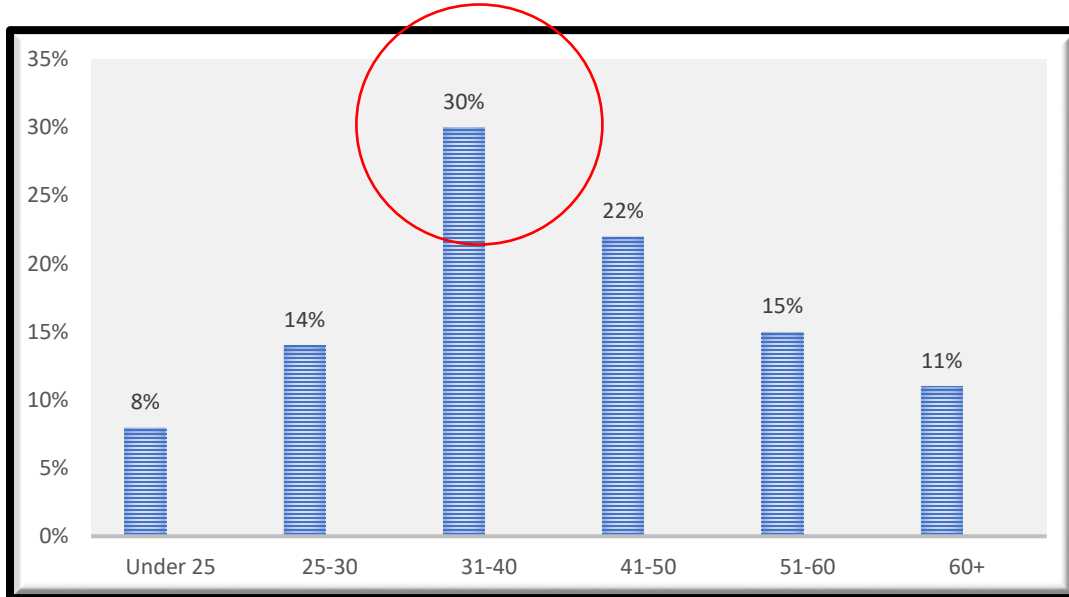
Survey respondents provided their gender, marital status, family status, age, annual household income, and ethnicity (See Table 1). Most respondents were white (57%) though 27% were Hispanic/Latino.

Figure 1: Survey Respondent Ethnicity



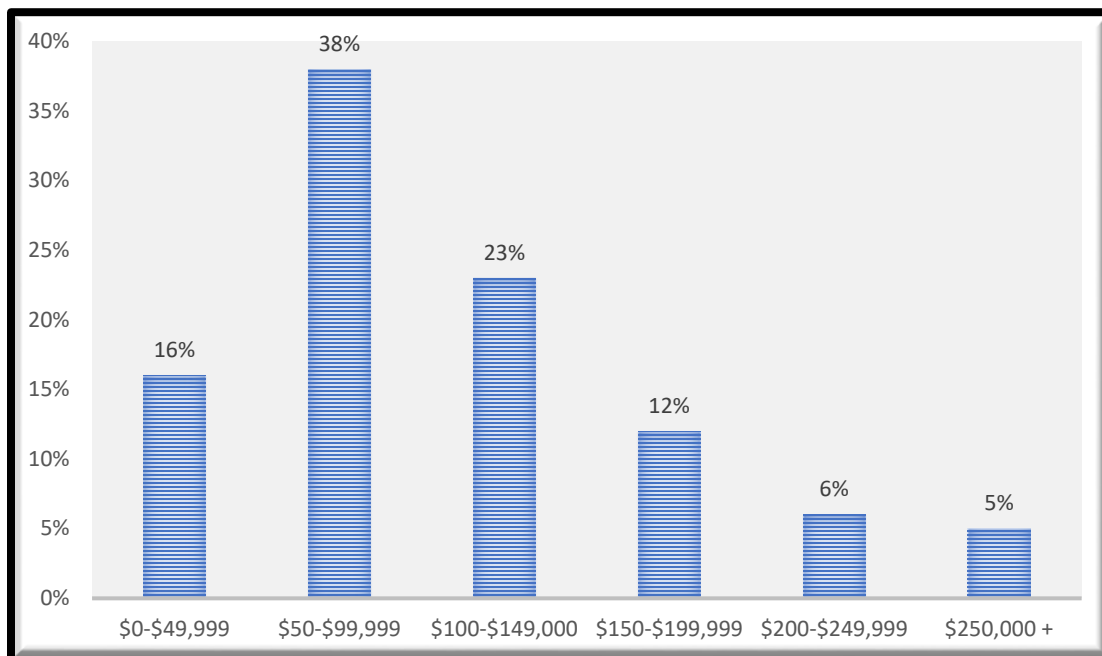
Overall, the average age of survey respondents was 42.2 years, with the median age at 40.6 years, which was older than the average age of 37 in the 2010/11 study. Survey respondents tended to be younger than the average age with the single largest segment of survey respondents in the 31-40 age segments, though 26% of respondents were above 50 years of age.

Figure 2: Survey Respondent Age



The average household income of survey respondents was \$115,000. Sixteen percent of those surveyed indicated they had a household income below \$50,000, and 46% above \$100,000.

Figure 3: Survey Respondent Household Income



In terms of family status, 25% of survey respondents indicated they had no children, while 54% indicated they had children at home. Survey respondents were likely to be married (68%). Fifty-one percent of survey respondents were male, and 49% were female.

Table 1: Summary Demographic Characteristics

	Total	Day Visitor	Overnight Visitor	SLO County Resident
Gender				
Male	51%	49%	51%	56%
Female	49%	51%	49%	44%
Marital Status				
Single	21%	33%	19%	18%
Married	68%	51%	70%	71%
Living Together	1%	2%	3%	3%
Widowed	10%	14%	8%	8%
Family Status				
No Children	25%	33%	23%	26%
Children at Home	54%	49%	57%	46%
Empty Nester	21%	18%	20%	28%
Household Income				
\$0-\$49,999	16%	23%	14%	14%
\$50-\$99,999	38%	32%	41%	37%
\$100-\$149,999	23%	24%	22%	26%
\$150-\$199,999	12%	13%	11%	19%
\$200-\$249,999	6%	1%	7%	2%
\$250,000+	5%	7%	5%	2%
Average	\$115,000	\$112,000	\$118,000	\$107,000
Median	\$95,000	\$91,000	\$95,000	\$97,000
Age				
Under 25	8%	12%	7%	7%
25-30	14%	17%	14%	10%
31-40	30%	34%	30%	23%
41-50	23%	13%	24%	25%
51-60	15%	14%	15%	15%
60 +	10%	10%	10%	20%
Average	42	39	42	45
Median	41	37	41	44

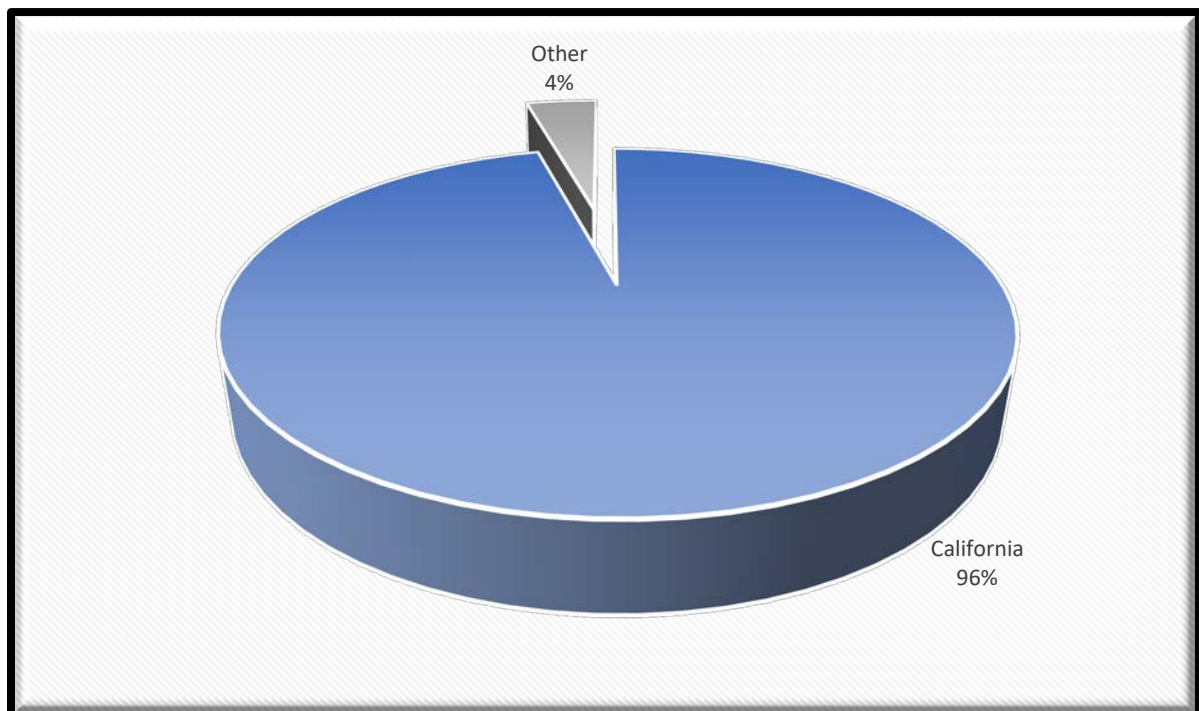
Table 1 above illustrates a detailed summary of the visitors to Oceano Dunes District. As can be seen, visitors on average are in their early forties with a household income of approximately \$115,000. Visitors tend to be married with children living at home, though a sizeable portion are either empty nesters or have no children.



1.2 Geographic Origin

Almost all (96%) survey respondents lived in California with the largest source of visitation from the Central Valley.

Figure 4: Current Principal Residence



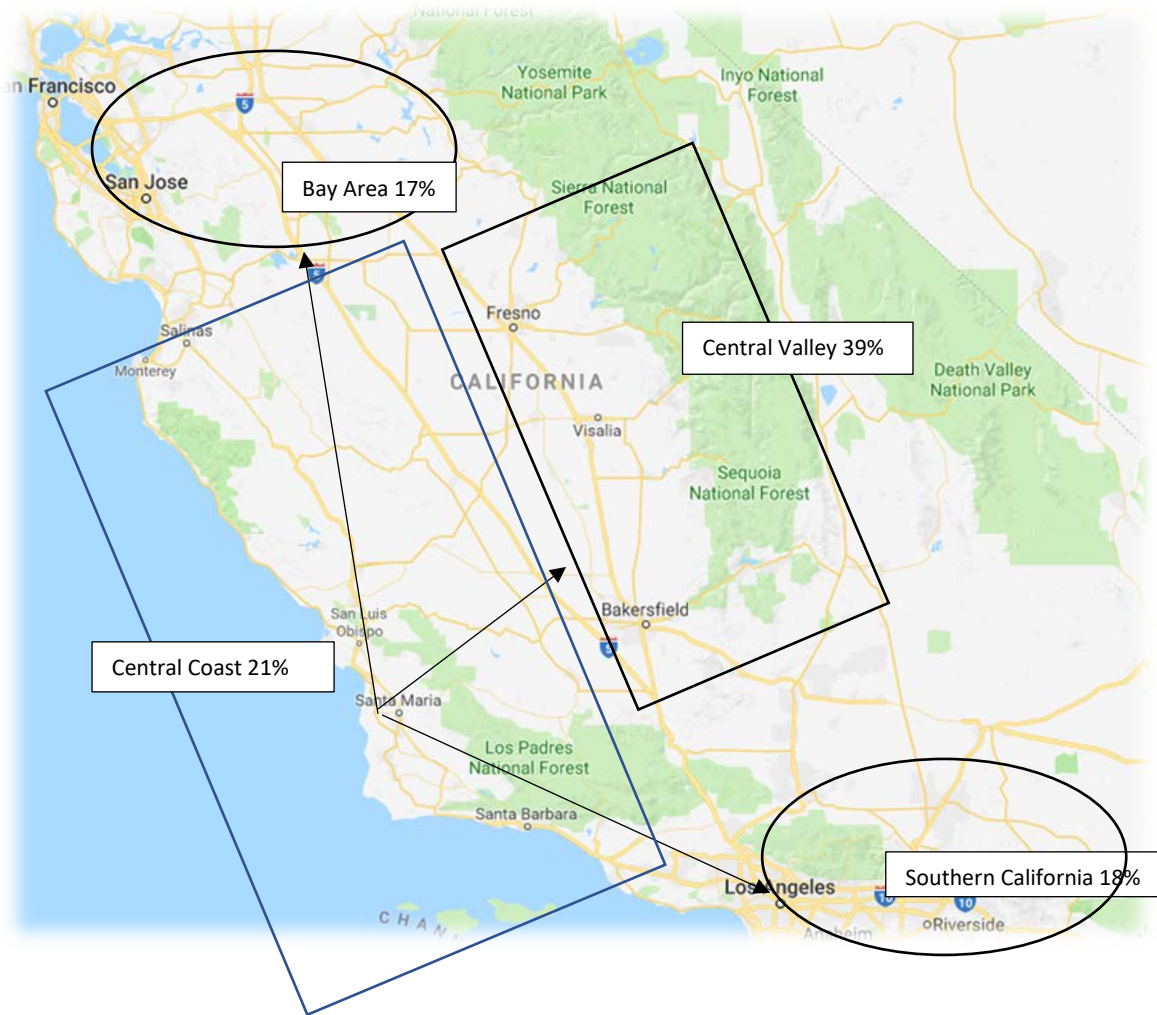
The single largest user market was from the Central Valley (39%), followed by the Central Coast (21%), Southern California (18%), and the greater Northern California Bay Area (17%).

Table 2: California/ Nevada/Arizona Market

	Total Visitors
Bay Area	
South Bay (Peninsula)	8%
East Bay	5%
San Francisco	2%
North Bay (Marin County/North Coast)	2%
Total Bay Area	17%
Central Valley	
Sacramento	3%
Fresno Area	19%
Bakersfield (Southern Central Valley)	17%
Total Central Valley	39%
Central Coast	
Monterey Bay	2%
San Luis Obispo	15%
Ventura/Santa Barbara	4%
Total Central Coast	21%
Southern California	
Los Angeles Basin	12%
Riverside/San Bernbnardino	3%
Mojave/High Desert	1%
Orange County/San Diego	2%
Total Southern California	18%
Out of State	
Nevada	3%
Arizona	2%
Total Out of State	5%



Figure C: California Visitor Market by Region



From a mileage perspective, approximately 95% of total visitors live within 320 miles. Approximately 55% are within 150 miles, and 78% are from within 200 miles indicating the District is a strong regional attraction.



Table 3: Visitor Markets by Mileage

	Miles	Pct	Cumulative Pct
Within 150 Miles			
San Luis Obispo	30	15%	15%
Ventura/Santa Barbara	121	4%	19%
Bakersfield (Southern Central Valley)	137	17%	36%
Fresno Area	149	19%	55%
Within 151-200 Miles			
Montery Bay	154	2%	57%
Los Angeles Basin	177	12%	69%
Mojave/High Desert	182	1%	70%
South Bay (Peninsula)	197	8%	78%
Within 201-300 Miles			
Riverside/San Bernbnardino	230	3%	81%
East Bay	237	5%	86%
San Francisco	249	2%	88%
Orange	250	1%	89%
North Bay (Marin County/North Coast)	259	2%	91%
301 Miles +			
Sacramento	306	3%	94%
San Diego	320	1%	95%
Out of State	320+	5%	100%

Note: Mileage is approximate

As can be seen in the table above, the District has a very strong draw from areas within 150 miles with approximately 55% of visitation coming from within that range. It also illustrates that the District is a strong draw for visitors beyond 150 miles. This may be attributed to the District’s unique location and experiences that visitors enjoy.



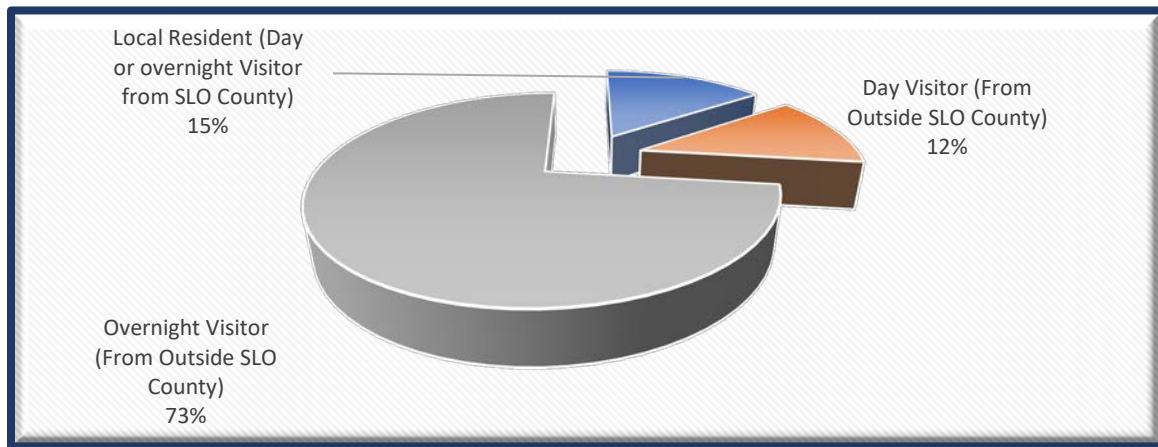
Section 2: Respondent Trip Behavior

2.1 Visitor Type

Of the total survey, 15% indicated they were either day (70%) or overnight (30%) residents of San Luis Obispo County.

Eighty-five percent of visitors to the District were from outside San Luis Obispo County, with 12% being day visitors, and 73% overnight visitors.

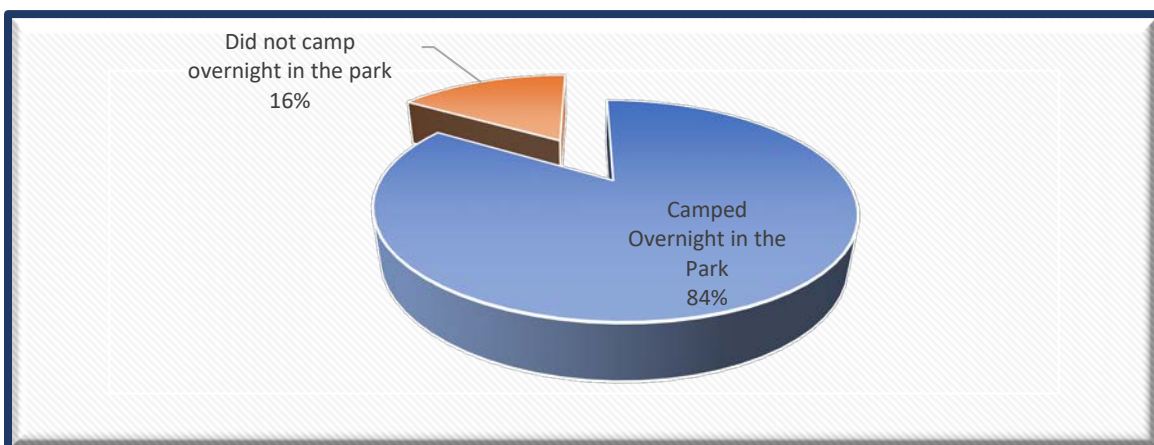
Figure 5: Visitor Type



2.2 Overnight Camping

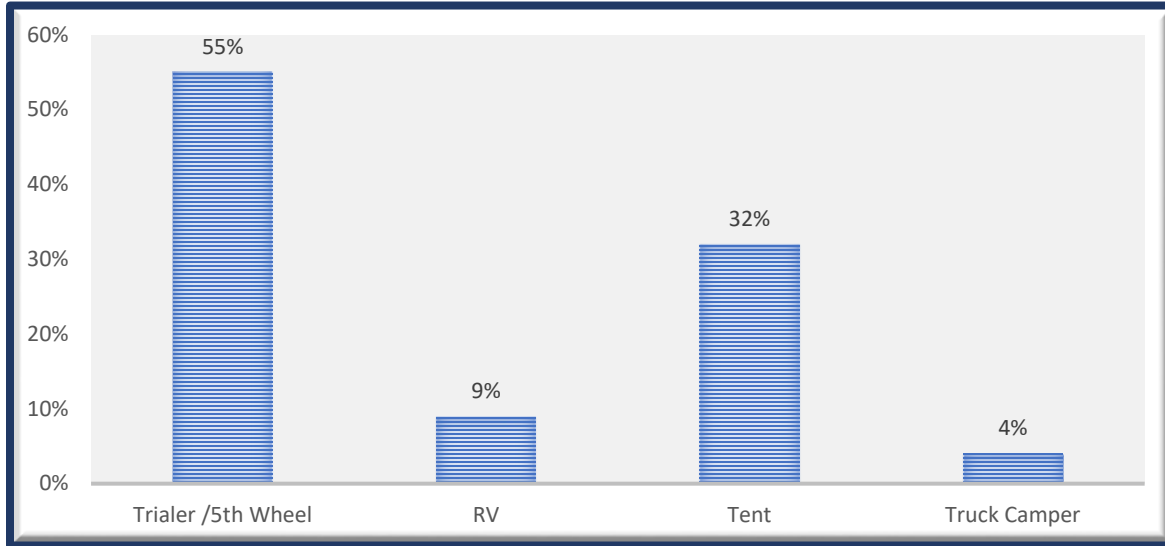
Of those visitors who indicated they were overnight visitors from outside of San Luis Obispo County, 84% camped overnight in the District on their last trip. This was consistent throughout the study period.

Figure 6: Camped in District (Base=Overnight Visitors)



Of those who camped overnight within the District, over half indicated they camped in a trailer/fifth wheeler, followed by tent camping (32%), recreational vehicle (9%), and truck camper (4%).

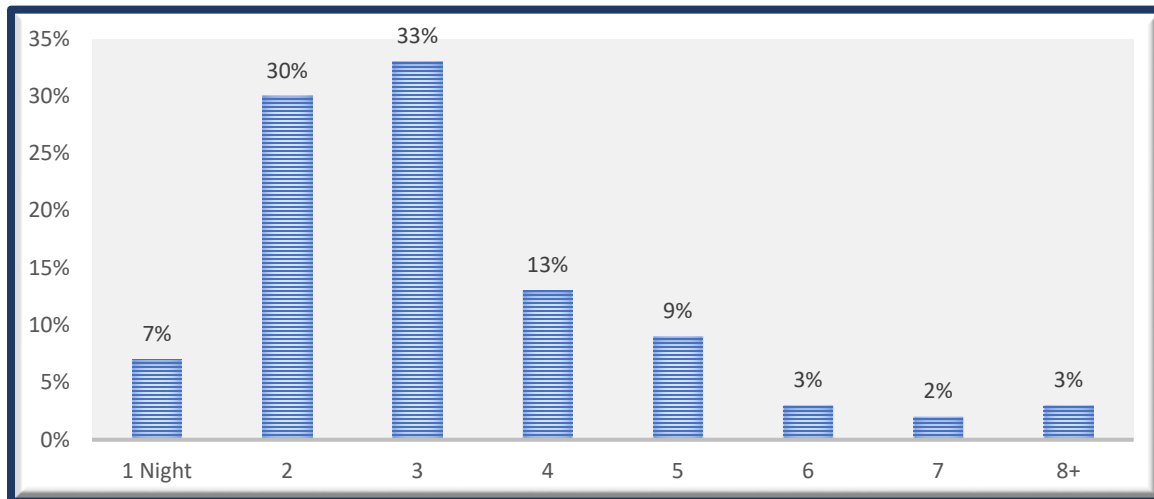
Figure 7: Type of Camping Within the District



2.3 Length of Stay

Of those surveyed, the average length of stay was 3.1 nights. The median length of stay was 3.0 nights.

Figure 8: Length of Stay

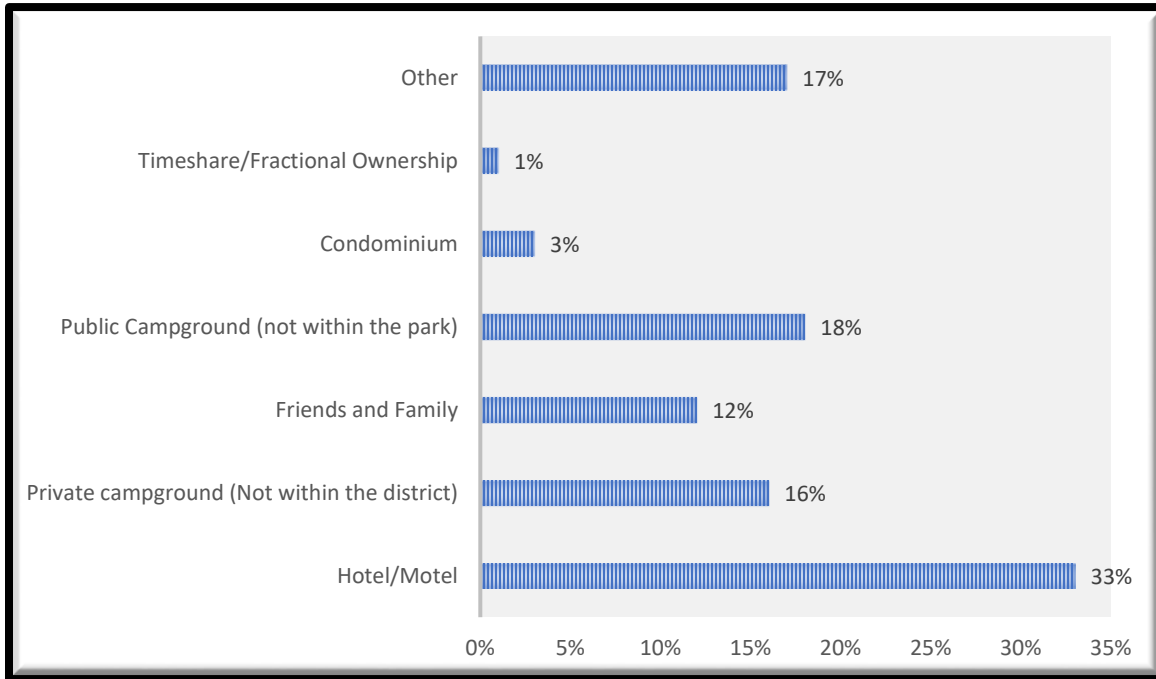


The highest concentration of visitation was two to three nights, this would tend to be consistent with the exhibited visitor pattern, which saw over half of those surveyed originating within 150 miles of the District. Clearly, the parks have a strong regional attraction.

2.4 Non-in District Camping Lodging

Of those overnight visitors who indicated they did not camp within the District on their last trip, 33% indicated they stayed in a hotel or motel. Sixteen percent indicated they stayed in a private campground not within the District, 12% stayed with friends and family, 18% in a public campground not within the District, 3% in a condominium, 1% indicated they stayed in a fractional/timeshare property, and 17% indicated other. The high percentage of those who indicated they stayed in “other” primarily include vacation rentals.

Figure 9: Non-in District Camping Lodging



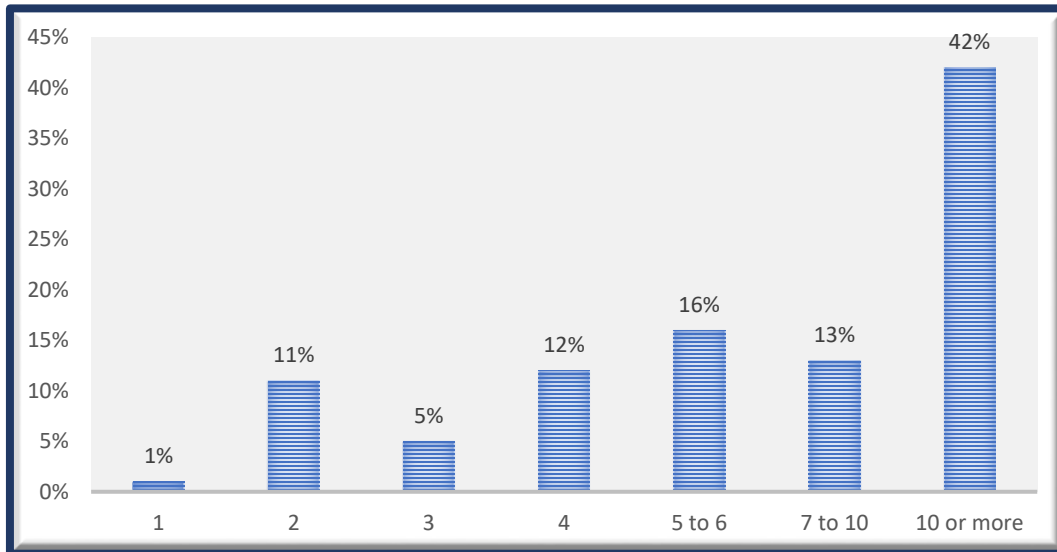
Of those overnight visitors who indicated they did not camp within the District, the number of nights they stayed in San Luis Obispo County was 3.8 nights compared with 3.0 nights of those staying in the District parks.

This suggests that even if overnight visitors did not camp in the District, a significant percentage stayed within San Luis Obispo County and stayed longer than those in the District parks.

2.5 Travel Party Size

The number of people in an immediate group tended to be large, with the average being 11.4 people including those under 18. This party size is reflective of the strong group travel dynamic to Oceano Dunes District parks.

Figure 10: Average Party Size



The average party size was highest among overnight visitors and lowest among day visitors from outside San Luis Obispo County.

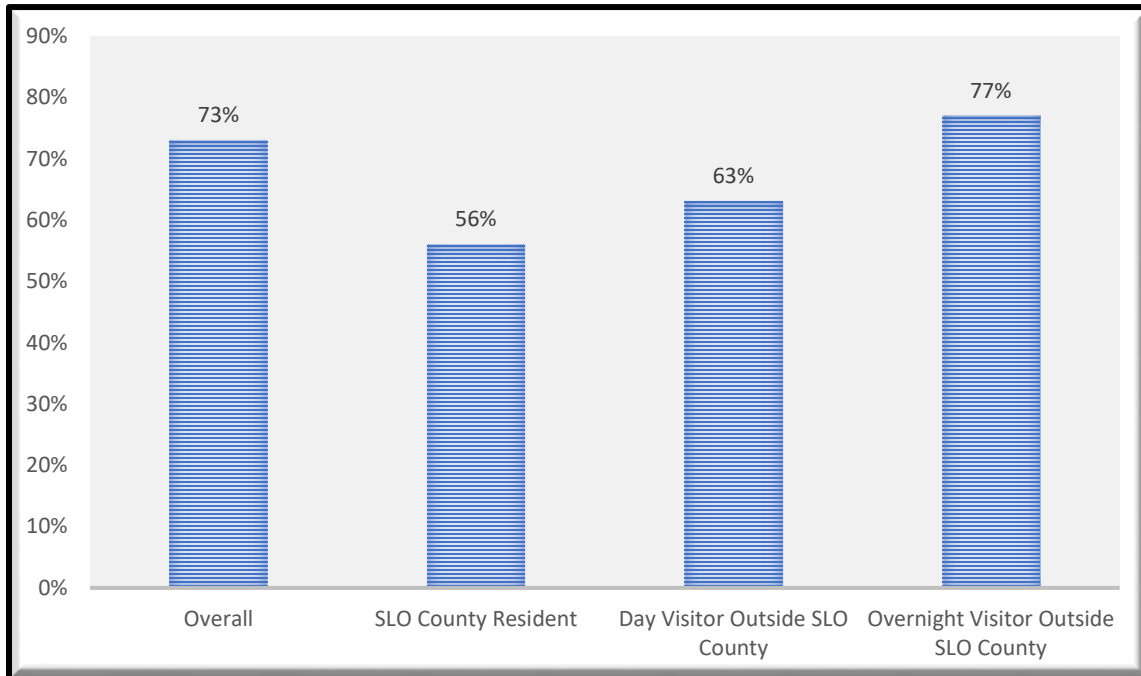
Figure 11: Average Party Size by Visitor Type



2.6 Presence of Children in Travel Group

Of those surveyed, 73% indicated that children between the ages of 0 and 17 were within 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. Residents from within the County were less likely to have children in their party, though over half did.

Figure 12: Percent of Groups with Children



Section 3: Activity Participation

3.1 Activity Participation within the District

As can be seen below in Figure 13 the activities that survey respondents participated in while in the District include a wide variety of both motorized and non-motorized. The most frequently mentioned activities included ATV riding, beach bonfire and sunsets, walking, photography, swimming and wading in the ocean and jeep or dune buggy driving.

Figure 13: Activity Participation within the District

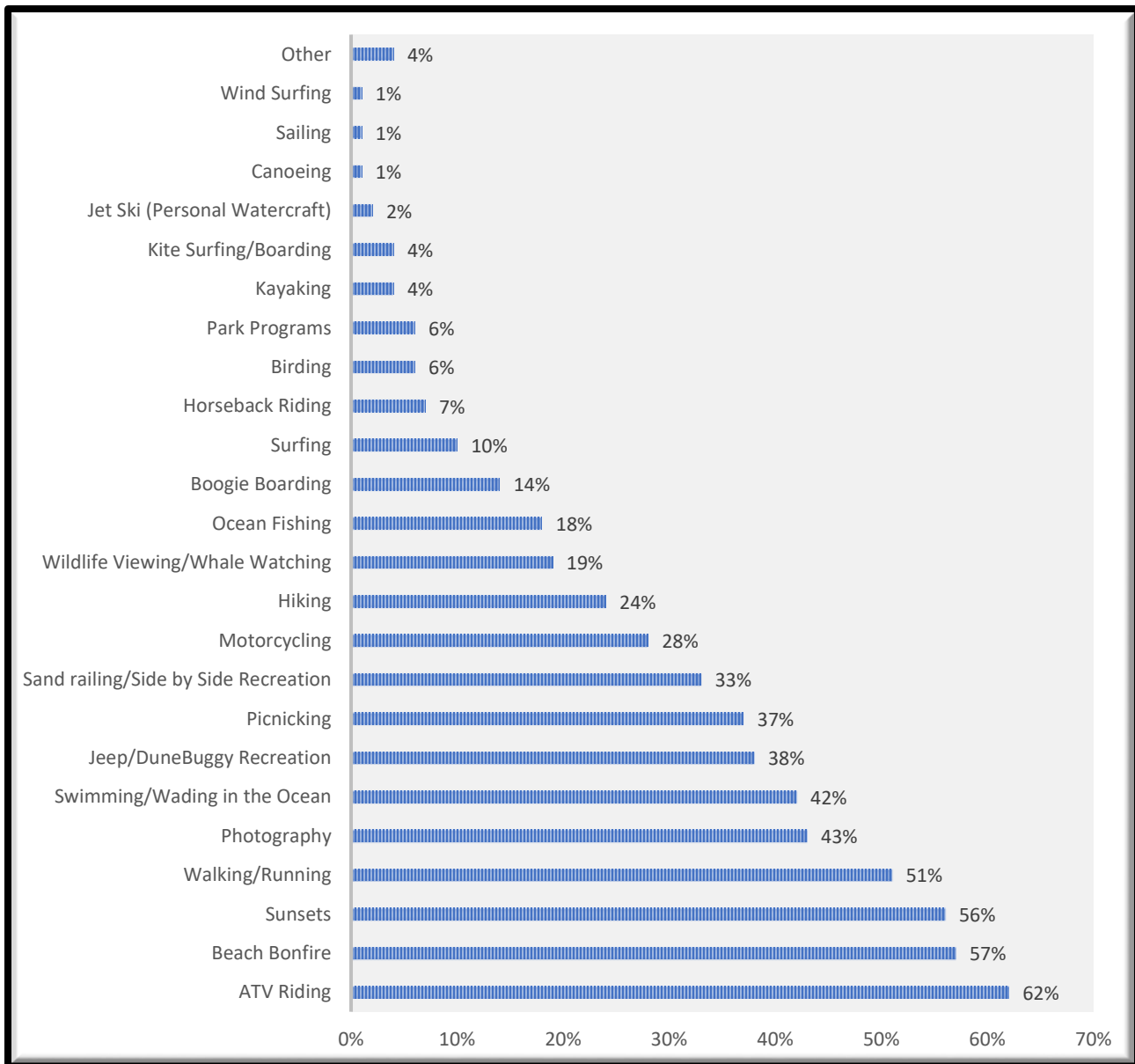
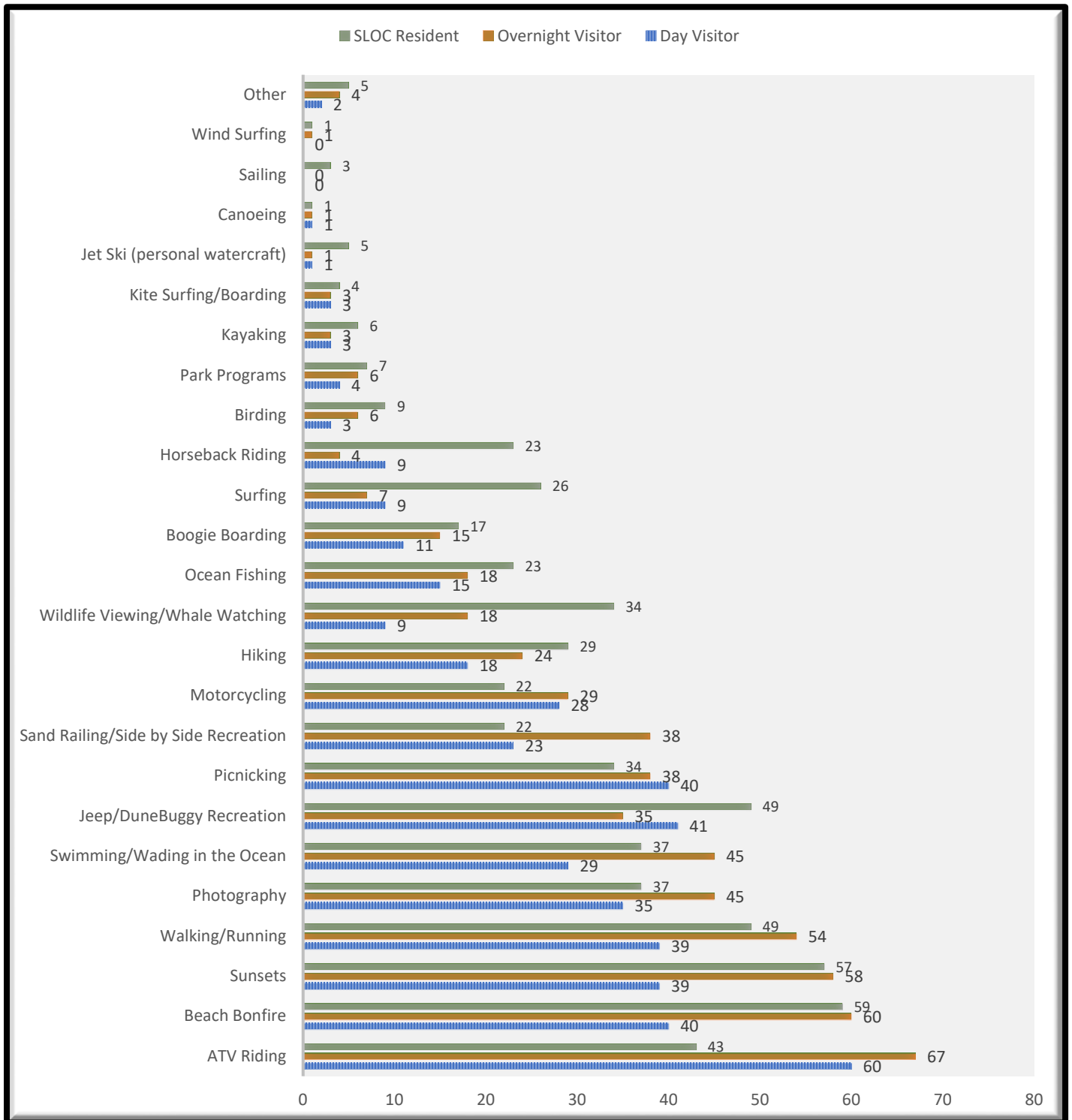


Figure 14 identifies the different levels of participation by San Luis Obispo County residents, Day Visitors and Overnight visitors.

Figure 14: Activity Participation within the District % (By Visitor Type)



As can be seen in Figure 14 on the previous page, there was a significant level of cross-over participation levels among different visitor types.

Table 4 below summarizes the top five activities by each segment.

Day visitors were most likely to participate in ATV riding, jeep/dune buggy recreation, beach bonfires, picnicking, sunsets and walking/running.

Residents of San Luis Obispo County were more likely to participate in beach bonfires, sunsets, jeep/dune buggy recreation, walking/running and ATV Riding.

Overnight visitors were more likely to participate in ATV riding, beach bonfires, sunsets, running/walking, photography and swimming/wading in the ocean.

Table 4: Top Five Activities by Segment

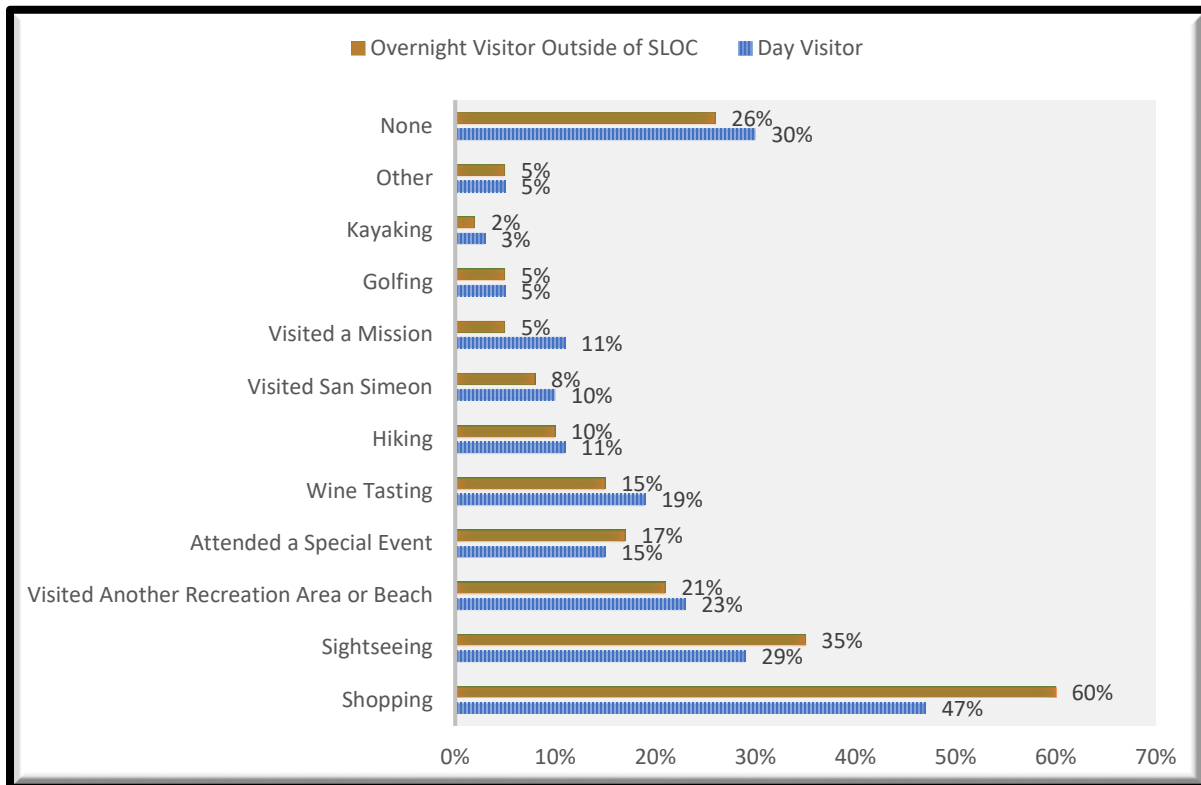
Overnight Visitors	%	Day Visitors	%	SLOC Residents	%
ATV Riding	67	ATV Riding	60	Beach Bonfires	59
Beach Bonfires	60	Jeep/Dune Buggy	41	Sunsets	57
Sunsets	58	Beach Bonfires	40	Jeep/DuneBuggy	49
Running/Walking	54	Picnicking	40	Walking/Running	49
Photography (Tied)	45	Sunsets (Tied)	39	ATV Riding	43
Swimming /Wading (Tied)	45	Walking/running (Tied)	39		



3.2 Activity Participation Outside the District

Asked if they participated in any activities outside the District parks, overnight visitors indicated that shopping, sightseeing and attending a special event were activities they participated in outside the parks. Day visitors were more likely to participate in wine tastings, visiting a mission, kayaking, visiting San Simeon as well as visiting another recreation area or beach.

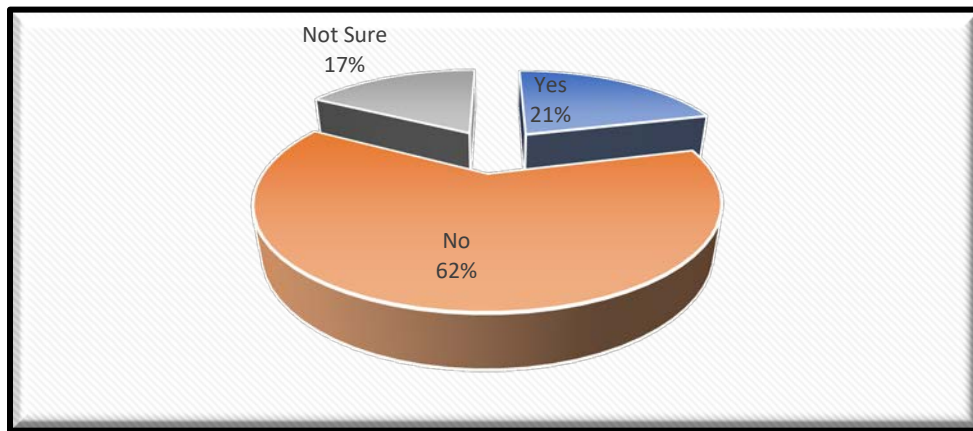
Figure 15: Activity Participation Outside the District (Base = Visitors from Outside San Luis Obispo County)



Section 4: Oceano Dunes SVRA Importance

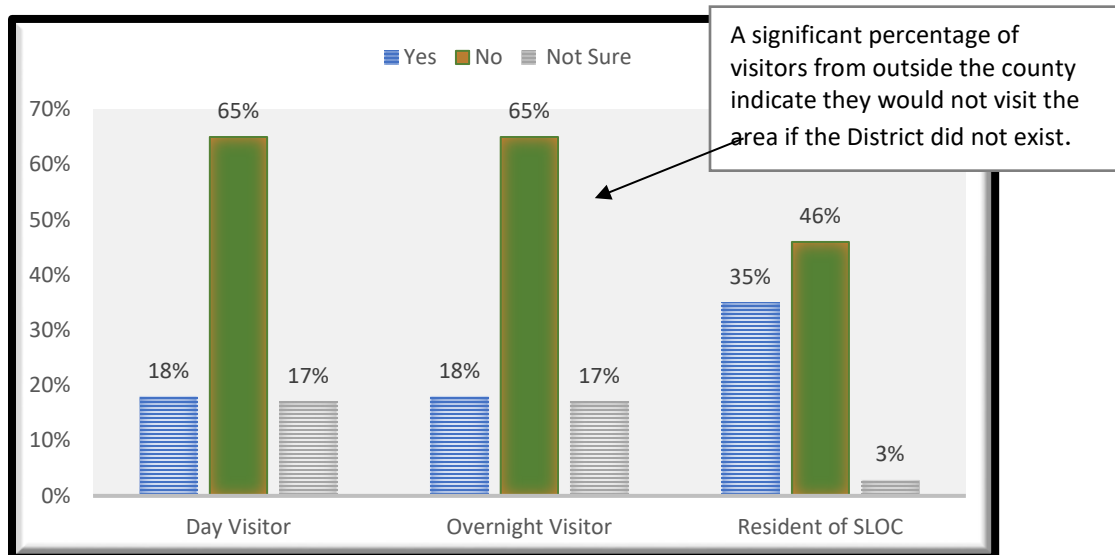
Survey respondents were asked if Oceano Dunes SVRA did not exist, would they still visit San Luis Obispo County. Overall, 62% indicated they would not visit the county, suggesting that Oceano Dunes provides a unique set of recreation experiences in a unique location. Visitors indicated that if it were not available, they would not visit San Luis Obispo County. As such, the District is a “Revenue Driver” for the local tourism economy.

Figure 16: Would still Visit San Luis Obispo County If No Oceano Dunes



Among visitors from outside San Luis Obispo County, 18% of overnight and day visitors indicated they would visit the County if Oceano Dunes did not exist.

Figure 17: Would still Visit San Luis Obispo County If No Oceano Dunes by Visitor Type

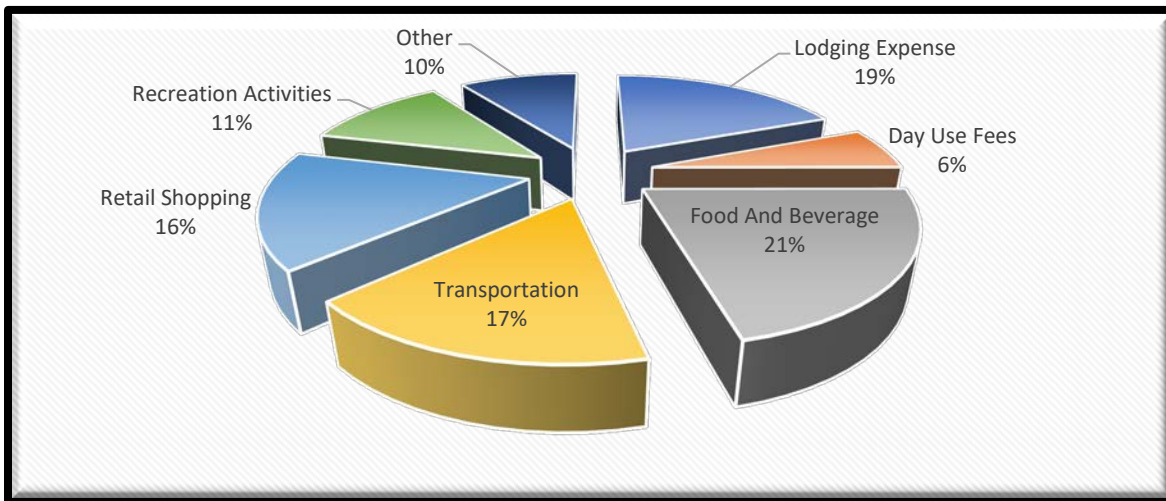


Section 5: Travel Spending

5.1 Overall Travel Spending

The survey asked respondents to estimate the amounts their party did spend each day on various aspects of their visit. As can be seen in the figure below transportation, food and beverage, and lodging capture a significant percentage of the travel budget. Note that day use fees and recreation activities are the smallest percentages of the visitor travel budget.

Figure 18: Visitor Spending by Category Percent



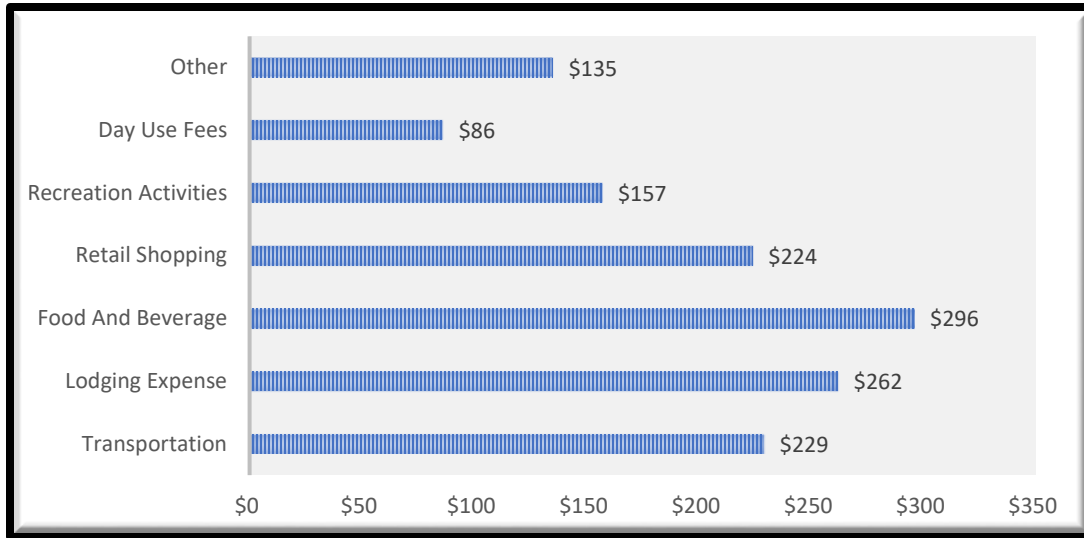
Spending category elements can be found below in Table 5.

Table 5: Spending Category Elements

Lodging Expenses	Hotels/Motels, Bed & Breakfast, Campgrounds/Lodging Rentals
Day Use Fees	Oceano Dunes SVRA, Pismo State Beach
Food & Beverages	Restaurants, Bars
Transportation Expenses	Gas, Oil, Repairs, Districting Fees, Public Transportation
Retail Shopping	Souvenirs, Gifts, Groceries, Equipment Purchases, Film, Bait, Supplies, etc.
Recreation Activities	Rentals, Lessons, Tours, Guides, Admission Fees, Cover Charges, Services, etc.
Any Other Expenses	Other Spending

In terms of visitor spending, Figure 19 below identifies the average spending in each of the travel spending categories. Overall travel spending for all visitors to the District was approximately \$1,389 for each travel party. Visitors in 2016/17 were likely to spend more on recreation, day use fees and other expenses than in previous years.

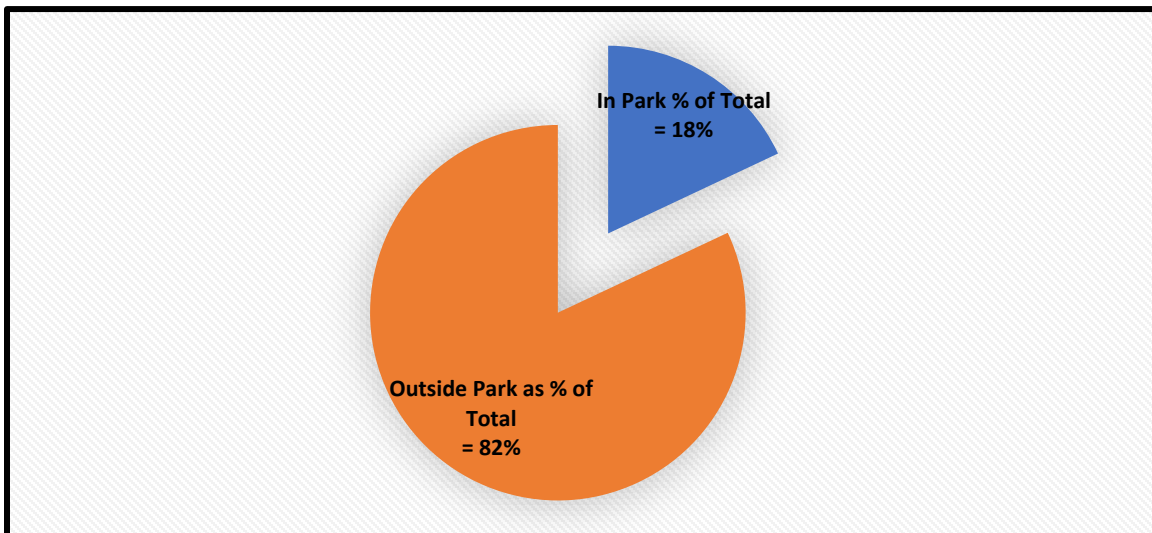
Figure 19: Visitor Spending by Category and Amount



5.2 In District Revenue Capture

Survey respondents were asked how much of their total group expenditure was spent inside the District parks. The average amount was \$249 which represents 17.9% of an immediate travel party's total trip expenditure.

Figure 20: In District Revenue Capture



Those expenditures inside the District include purchasing concession services such as OHV and camping trailer rentals, mobile pumping and fresh water renewal and camping item purchases. Humvee tours, Fins Restaurant, and Pismo State Beach Golf Course.

Section 6: Economic Impact

Economic Impact Results

A. Total Output

Overall economic impact is estimated to be \$243,580,919 (Direct + Indirect+ Induced Spending). Total economic impact by day visitors is estimated to be \$22,133,719, and overnight visitor impact is \$221,447,200.

Figure 21: Estimated Economic Impact

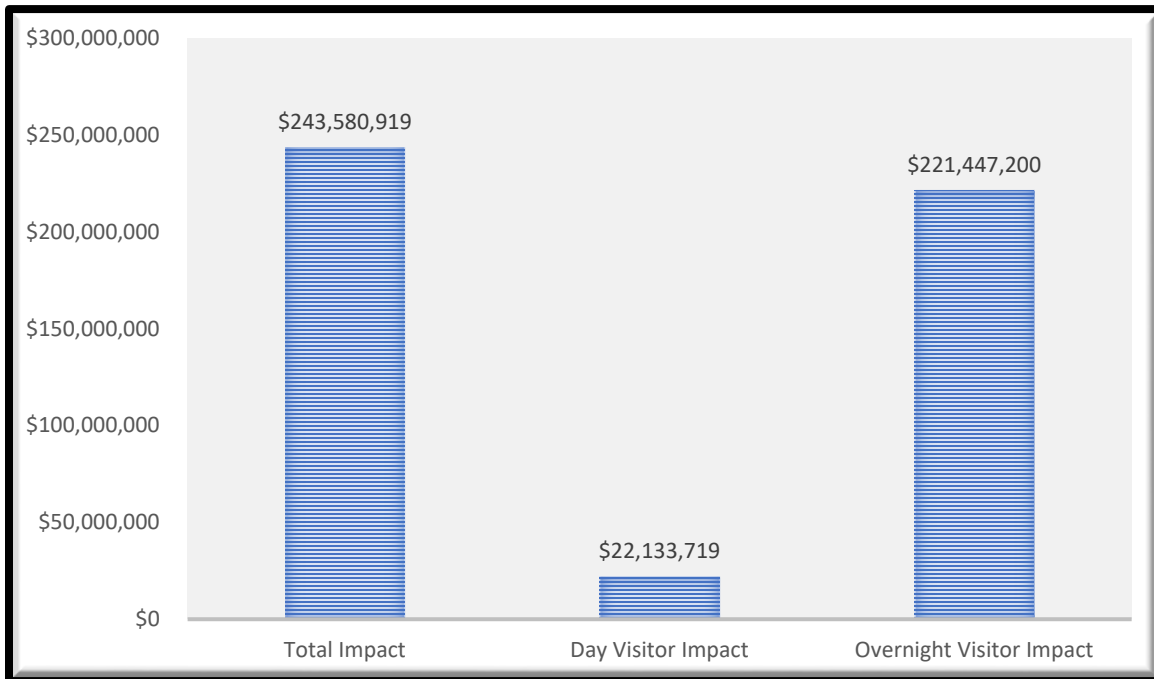


Table 6: Estimated Economic Impact

Total Impact:		Day Visitor Impact:		Overnight Visitor Impact:	
Direct Effect	\$158,861,742	Direct Effect	\$14,330,474	Direct Effect	\$144,531,268
Indirect Effect	\$38,135,136	Indirect Effect	\$3,319,772	Indirect Effect	\$34,815,364
Induced Effect	\$46,584,041	Induced Effect	\$4,483,473	Induced Effect	\$42,100,568
Total Effect	\$243,580,919	Total Effect	\$22,133,719	Total Effect	\$221,447,200

Source: IMPLAN Economic Model/ San Luis Obispo County Data Set

Figure 22 below identifies the five largest economic impact sectors.

Figure 22: Estimated Overall Economic Impact by Top 5 Sectors (000's)

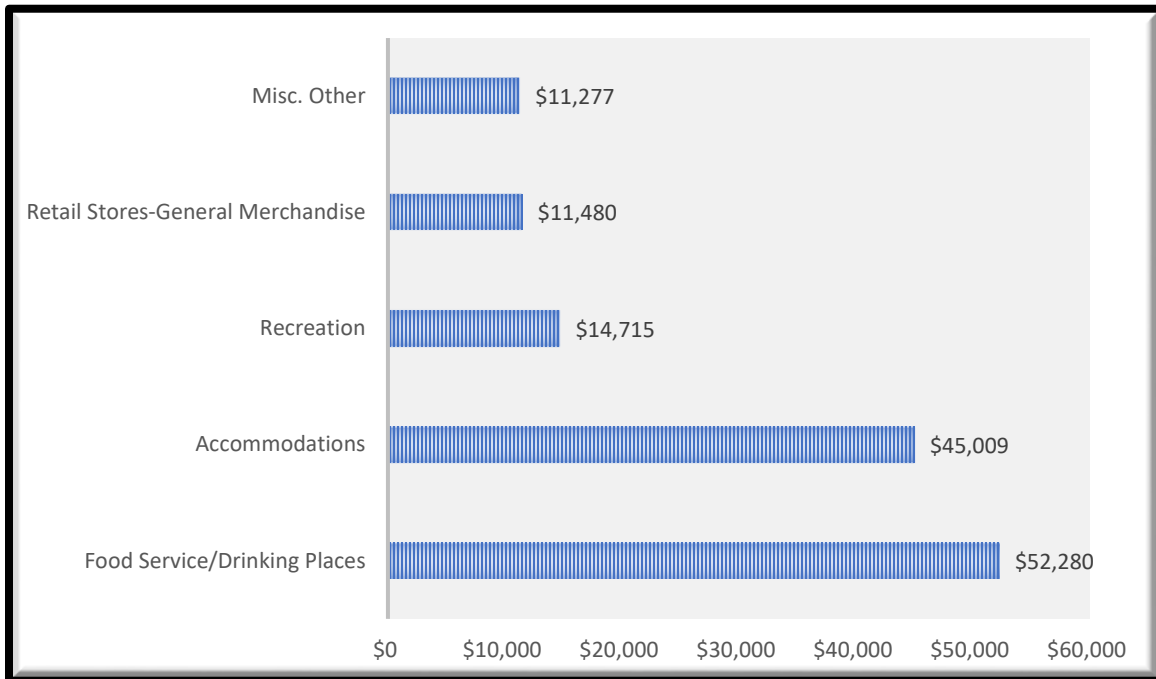


Table 7 below identifies the five largest economic impact sectors for day, overnight and total visitor segments.

Table 7: Estimated Economic Impact by Top 5 Sectors

Total Economic Output-Top 5:		Amount
Food services and drinking places		\$52,280,980
Accommodations		\$45,009,338
Recreation		\$14,715,194
Retail Stores - General merchandise		\$11,480,813
Misc. Other		\$11,277,633
Day Visitor Economic Output-Top 5:		
Food services and drinking places		\$6,227,617
Use Fees		\$3,239,500
Recreation		\$1,765,499
Miscellaneous		\$1,363,051
Retail Stores - General merchandise		\$1,325,770
Overnight Visitor Economic Impact-Top 5:		
Food services and drinking places		\$46,007,140
Accommodations		\$39,608,112
Recreation		\$12,949,336
Real estate rentals etc.		\$12,247,851
Retail Stores - General merchandise		\$9,924,290

Source: IMPLAN Economic Model/ San Luis Obispo County Data Set

B. Employment

Overall employment generated is estimated to be 3,302 (Direct + Indirect+ Induced employment). Total employment generated by day visitors is estimated to be 318, and employment generated by overnight visitors was 2,905 jobs.

Figure 23: Estimated Overall Employment

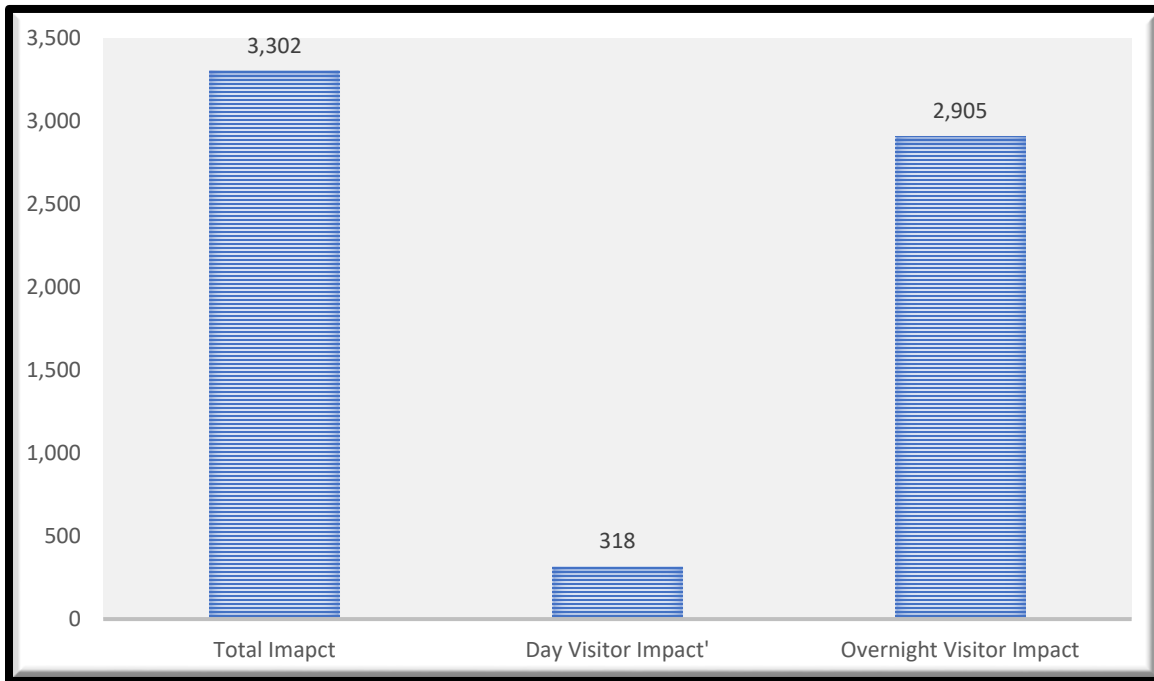


Table 8: Estimated Employment

Total Impact:		Day Visitor Impact:		Overnight Visitor Impact:	
Direct Effect	2,612.9	Direct Effect	257.6	Direct Effect	2,299.3
Indirect Effect	312.6	Indirect Effect	25.2	Indirect Effect	275.1
Induced Effect	376.6	Induced Effect	35.3	Induced Effect	331.4
Total Effect	3,302.1	Total Effect	318.1	Total Effect	2,905.8

Source: IMPLAN Economic Model/ San Luis Obispo County Data Set



Figure 24: Top-5 Employment Sectors

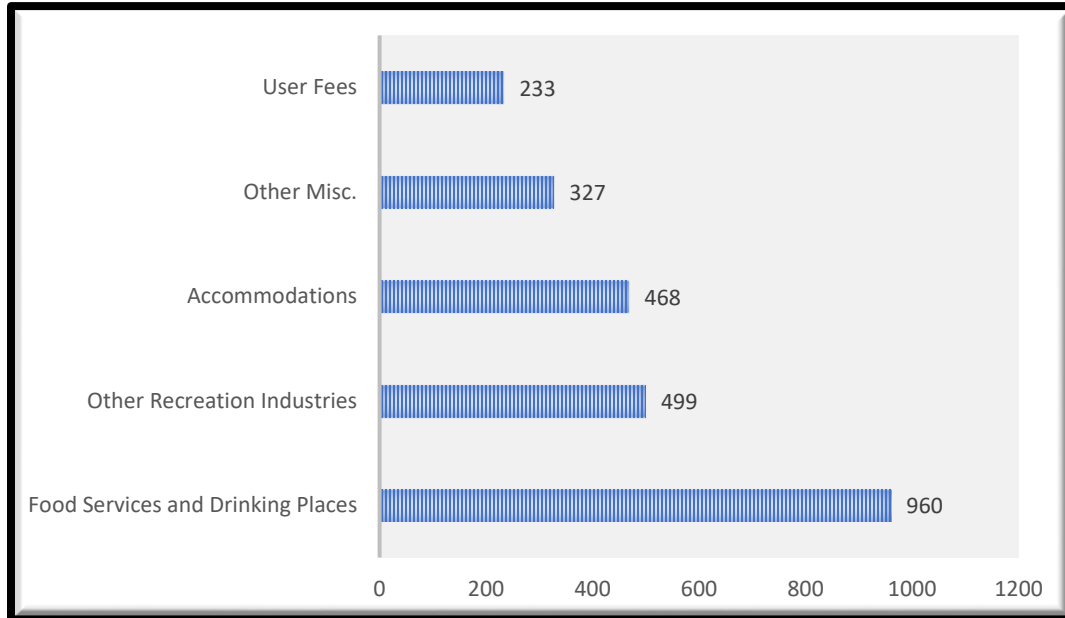


Table 9 below identifies the five largest employment sectors for day, overnight and total visitor segments.

Table 9: Estimated Employment by Top 5 Sectors

Total Employment-Top 5:	
Food services and drinking places	960
Other recreation industries	499
Accommodations	468
Other Misc	327
Use Fees	233
Day Visitor Employment Top 5:	
Food services and drinking places	114
Other recreation industries	60
Use Fees	39
Misc Other	27
Retail Stores	17
Overnight Visitor Employment-Top 5:	
Food services and drinking places	844
Other recreation industries	106
Accommodations	81
Other Misc	55
Use Fees	30

Source: IMPLAN Economic Model/ San Luis Obispo County Data Set

C. Tax Impact

In terms of generated taxes, it is estimated that approximately \$1.9M in both local and state taxes are generated as noted in the table below.

Table 10: State and Local Taxes

	Compensation	Production & Imports	Households	Corporations
Dividends				\$1,202.00
Social Ins Tax- Employee Contribution	\$13,261.00			
Social Ins Tax- Employer Contribution	\$27,779.00			
TOPI: Sales Tax		\$753,438.00		
TOPI: Property Tax		\$668,889.00		
TOPI: Motor Vehicle Lic		\$14,610.00		
TOPI: Severance Tax		\$689.00		
TOPI: Other Taxes		\$68,020.00		
TOPI: S/L NonTaxes		\$8,947.00		
Corporate Profits Tax				\$21,441.00
Personal Tax: Income Tax			\$272,042.00	
Personal Tax: NonTaxes (Fines- Fees			\$37,869.00	
Personal Tax: Motor Vehicle License			\$9,387.00	
Personal Tax: Property Taxes			\$4,189.00	
Personal Tax: Other Tax (Fish/Hunt)			\$1,844.00	
Total State and Local Tax	\$41,040.00	\$1,514,593.00	\$325,331.00	\$22,643.00
Total				\$1,903,607.00

Source: IMPLAN Economic Model/ San Luis Obispo County Data Set



Glossary of Terms

IMPLAN	Economic analysis software used to develop economic impact, employment and tax estimates.
Indirect Impact	Additional impacts caused by industries purchasing from industries in Input/Output analysis.
Induced Impact	The impacts of household expenditures in Input/Output analysis.
Direct Impact	The set of expenditures applied to the predictive model (i.e., Input/Output 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 (example: health, retirement, etc.) and employer paid payroll taxes (e.g. employer side of social security, unemployment taxes, etc.).
Household	Residents of the study area. Final users of nondurable goods & services. One of several institutions in IMPLAN.
Corporation	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)

Appendix

Appendix 1: Email Survey

Oceano Dunes District Economic Impact Survey (English Version)

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

2. During your most recent trip to Oceano Dunes District were you

Local Resident (Day or overnight visitor from within San Luis Obispo County) **Go to Q8**

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

Overnight visitor from outside San Luis Obispo County **(Go to Q3)**

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

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

Yes **(Go to Q4)**

No **(Go to Q6)**

4. If you were camping overnight in the District, 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 District?

Nights _____ **(Go to Q8)**

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

Hotel/Motel

Timeshare/Fractional Ownership

Condominium

Private Campground/RV (not within the District)

Public Campground/RV (within the District)

Friends & Family

Other

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

Nights _____

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

8. If Oceano Dunes was not in existence (no OHV riding, no camping, no trails, etc.) when you were considering a visit to the area, would you still have visited San Luis Obispo County?

- _____ Yes
- _____ No
- _____ Not Sure

9A. Which of these recreational activities did your group participate in, within the District during your most recent visit to Oceano Dunes District? (check all that apply)

- ATV riding
- Motorcycle riding
- Jeep/Dune Buggy (street legal vehicle) recreation
- Sand railing / Side x side recreation
- Kayaking
- Ocean fishing
- Swimming/wading in the ocean
- Kite surfing / boarding
- Canoeing
- Sailing
- Jet skiing (riding personal watercraft)
- Wind surfing
- Boogie boarding
- Surfing
- Horseback riding
- Hiking
- Walking/running
- Birding
- Photography
- Picnicking
- Sunsets
- Wildlife viewing/ whale watching
- District Programs
- Beach bonfire
- Other _____

(List)

9B. Did you participate in any of the following activities outside the District?

- _____ Wine tasting
- _____ Kayaking
- _____ Visited San Simeon/ Hearst Castle
- _____ Shopping
- _____ Sightseeing
- _____ Visited a Mission
- _____ Hiking
- _____ Golfing
- _____ Visited another recreation area or Beach (Lopez Lake, Nacimiento or San Antonio Lakes, Avila Beach, etc.)
- _____ Attended an event (Mid-State Fair, Local Festival, Farmers Market, Concert, Car Show, St. Anthony's, Wine Festival, etc.)
- _____ Other: _____

10. How many people (including yourself) were in your immediate group when visiting Oceano Dunes District parks?

Adults (18 +) _____
Children (0-17) _____
Total _____

11A. To better understand the economic impact of visitors to Oceano Dunes District parks on San Luis Obispo 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 District. 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 District \$
 - C. Food & beverages at restaurants, bars \$
 - D. Transportation expenses (gas, oil, repairs, Districting 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 District on the following: (ATV, Dune Buggy, Camping Trailer, Banana Boy, Pumping Service, Firewood, Ice, Fin's Restaurant, Pismo State Beach Golf Course)

\$ _____

12. Gender

_____ Male
_____ Female

13. What is your marital status?

_____ Single
_____ Married
_____ Widowed
_____ Partner/Living Together

14. Do you have children?

_____ No children
_____ Yes, Children at Home

_____ Yes, Empty Nester

15. How old are you?

_____ Under 25

_____ 25-30

_____ 31-40

_____ 41-50

_____ 51-60

_____ 60 +

16. Which category best describes your annual household income?

_____ 0-\$29,999

_____ \$30-\$39,999

_____ \$40-\$49,999

_____ \$50-\$59,999

_____ \$60-\$69,999

_____ \$70,000-\$99,999

_____ \$100,000-\$149,999

_____ \$150,000-\$199,999

_____ \$200,000-\$249,999

_____ \$250,000-\$349,999

_____ \$350,000-\$499,999

_____ \$500,000+

17. Ethnicity:

_____ White

_____ African American

_____ Asian or Asian American

_____ Hispanic/Latino

_____ Native American

_____ Other

_____ Not Sure/Don't Know

_____ No Answer

Thank you for completing the survey... Instructions. Way to contact you if they had questions about the survey.

The End

Appendix 1: Email Survey

Oceano Dunes District Economic Impact Survey (Spanish Version)

1. ¿Cuál es el código ZIP de su residencia principal actual?

2. Durante su más reciente viaje a Oceano Dunes District, usted era

____ Residente local (visitante del día o que pernocta desde el mismo Condado de San Luis Obispo) **Vaya a la P 8**

____ Visitante del día desde fuera del Condado de San Luis Obispo (**Vaya a la P 8**)

____ Visitante que pernocta desde fuera del Condado de San Luis Obispo (**Vaya a la P 8**)

-----Visitantes que pernoctan-----

3. En su último viaje con pernocta a Oceano Dunes District, ¿acampó y pernoctó en el parque?

____ Sí (**Vaya a la P 4**)

____ No (**Vaya a la P 6**)

4. Si acampó y pernoctó en el parque, ¿qué tipo de *acampada con pernocta* realizó? (Seleccione solo una)

____ Autocaravana

____ Tienda de acampar

____ Remolque/5^{ta} rueda

____ Caravana desmontable

5. ¿Cuántas noches pasó en el Condado de San Luis Obispo en su último viaje a Oceano Dunes District?

No. de noches _____ (**Vaya a la P 8**)

6. ¿En qué tipo de alojamiento se quedó en su último viaje a Oceano Dunes District?

____ Hotel/Motel

____ Multipropiedad/propiedad fraccionada

____ Condominio

____ Campamento privado/autocaravana (no dentro del parque)

____ Campamento público/autocaravana (dentro del parque)

____ Amigos y familiares

____ Otro

7. ¿Cuántas noches pasó en el Condado de San Luis Obispo en su último viaje a Oceano Dunes District?

No. de noches _____

-----Todos los visitantes-----

8. Si Oceano Dunes no hubiera existido (sin vías para karts todoterreno ni áreas para acampar ni senderos, etc.) cuando estaba planificando una visita al área, ¿aun así habría visitado el Condado de San Luis Obispo?

- Sí
 No
 No estoy seguro

9A. ¿En cuáles de estas actividades recreativas participó su grupo dentro del parque durante su visita más reciente a Oceano Dunes District? (Seleccione todas las que correspondan)

- Conducción de vehículos todo terreno
- Conducción de motocicletas
- Recreación en jeep/dune buggy (vehículo apto para circular en calles)
- Recreación en arenero/vehículo "Side by side"
- Piragüismo
- Pesca en el mar
- Nadar/vadear en el mar
- Kitesurfing
- Canotaje
- Navegación a vela
- Conducción de moto acuática
- Windsurfing
- Bodyboarding
- Surfing
- Hípica
- Senderismo
- Caminatas/carreras
- Observación de aves
- Fotografía
- Pícnic
- Crepúsculos
- Observación de vida salvaje o ballenas
- Programas en el parque
- Fogata en la playa
- Otro _____

(Lista)

9B. ¿Participó en alguna de las siguientes actividades fuera del parque?

- Cata de vino
 Piragüismo
 Visitar San Simeon / Hearst Castle
 Compras
 Visitar lugares de interés
 Visitar una Misión
 Senderismo
 Golf
 Visitar otra área recreativa o playa (Lopez Lake, Nacimiento o San Antonion Lakes, Avila Beach, etc.)
 Asistir a un evento (Feria del Mid-Sate, Festival local, mercado de productores, concierto, exposición de automóviles, St. Anthony's, festival de vino, etc.)
 Otro: _____
-

10. ¿Cuántas personas (usted incluido) se encontraban en su grupo inmediato cuando estaba de visita en Oceano Dunes District?

Adultos (18 +) _____
Niños (0-17) _____
Total _____

11A. Para entender mejor el impacto económico de los visitantes en Oceano Dunes District en San Luis Obispo, estamos interesados en determinar la cantidad aproximada de dinero que usted y los demás visitantes en su grupo inmediato gastaron en el Condado de San Luis Obispo durante su visita más reciente a Oceano Dunes SVRA. Entendemos que esta es una pregunta difícil, pero por favor haga su mejor esfuerzo debido a que sus respuestas son muy importantes para nosotros. Durante su visita, ¿cuál es la cantidad aproximada que todo su grupo gastó en cada una de las siguientes categorías?

- A. Gastos de alojamiento (hoteles/moteles, cama y desayuno, campamentos) \$
- B. Tarifas por uso diario de instalaciones en Oceano Dunes District \$
- C. Comida y bebidas en restaurantes, bares \$
- D. Gastos de transporte (gas, gasolina, reparaciones, tarifas de estacionamiento, transporte público) \$
- E. Compras en tiendas minoristas (recuerdos, regalos, película, carnada, suministros, comestibles, equipos, etc.) \$
- F. Actividades de recreación (alquileres, lecciones, recorridos, guías, entradas, cargos de cobertura, servicios, etc.) \$
- G
Otros gastos

Por favor, especifique \$

11B. De la cantidad total que usted y su grupo inmediato gastaron, ¿cuánto estima que gastó dentro del parque en lo siguiente: (Vehículo todo terreno, dune buggy, remolque para acampar, Banana Boy, servicio de agua, fogata, hielo, restaurantes Finns, campo de golf Pismo State Beach)

\$ _____

12. Sexo

_____ Masculino
_____ Femenino

13. ¿Cuál es su estado civil?

_____ Soltero(a)
_____ Casado(a)
_____ Viudo(a)
_____ Concubino

14. ¿Tiene hijos?

- Sin hijos
- Sí, hijos en el hogar
- Sí, hijos ya no están en el hogar

15. ¿Qué edad tiene?

- Menor de 25
- 25-30
- 31-40
- 41-50
- 51-60
- Más de 60

16. ¿Qué categoría describe mejor su ingreso familiar anual?

- 0-\$29,999
- \$30-\$39,999
- \$40-\$49,999
- \$50-\$59,999
- \$60-\$69,999
- \$70,000-\$99,999
- \$100,000-\$149,999
- \$150,000-\$199,999
- \$200,000-\$249,999
- \$250,000-\$349,999
- \$350,000-\$499,999
- Más de \$500,000

17. Origen étnico:


- Blanco
- Afroamericano
- Asiático o asiático americano
- Hispano/Latino
- Nativo americano
- Otro
- No estoy seguro/no sé
- Sin respuesta

Gracias por completar esta encuesta.....

Fin

Appendix 2: Participation Form

English Version



Oceano Dunes District Economic Impact Study Participation Form

Please participate in a confidential Email survey about your experience at Oceano Dunes District Parks!
 Yes, please contact me via email after my trip No, not at this time

If yes, please complete the following contact information. A contact name and Email Address is required. **Your information will be kept confidential and used for statistical purposes only!**

Name: _____
Email Address: _____

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 \$250 American Express Gift Card!

Thank You!

Spanish Version



Estudio del impacto económico en el Distrito de Oceano Dunes Formulario de participación

Por favor, participe en una encuesta confidencial por correo electrónico sobre su experiencia en Oceano Dunes District Parks.
 Sí, por favor, contácteme por correo electrónico después de mi viaje No, no en este momento

Si respondió Sí, por favor complete la siguiente información de contacto. Se requiere un nombre de contacto y una dirección de correo electrónico. **Su información será confidencial y usada únicamente con fines estadísticos.**

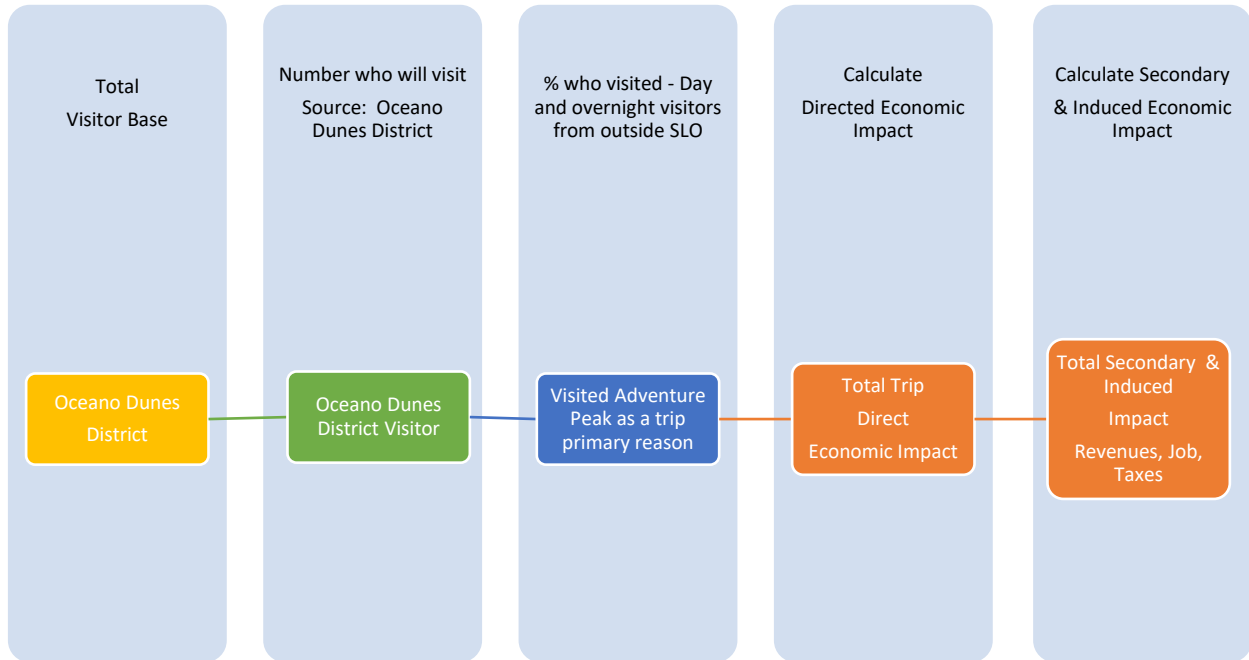
Nombre: _____ Teléfono _____
Dirección de correo electrónico: _____

Su información será confidencial, no venderemos su nombre y la información que proporcione será destruida después de que sea tabulada para garantizar su confidencialidad.

Al participar, será elegible para ganar una tarjeta de regalo gratis de American Express de \$250. Gracias!

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

July 2016	280,802
Aug	207,546
Sept	162,090
Oct	138,607
Nov	176,354
Dec	135,615
Jan 2017	113,302
Feb	82,968
March	123,051
April	145,704
May	148,886
June	204,281
July	294,450
Total	2,213,656

2. Eliminate local in-county residents 15%

$$2,213,656 \times 85\% = 1,881,607$$

3. Determine the number of travel parties

$$1,881,697 / 11 \text{ people per party} = 171,055$$

4. Travel Party Trip Expenditure by Category

Lodging expenses	\$262
Day Use Fees	\$86
Food & beverages	\$296
Transportation expenses	\$229
Retail shopping	\$224
Recreation activities	\$157
Any other expenses	\$135
Total	\$1,389

*Numbers may not foot due to rounding