Oceano Dunes District-California State Parks

Economic Impact Analysis Report 2016/17
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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.
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.

<table>
<thead>
<tr>
<th>Information Collection</th>
<th>Data Analysis</th>
<th>Final Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sampling plan</td>
<td>• Tabulate survey data</td>
<td>• Draft report</td>
</tr>
<tr>
<td>• Survey development</td>
<td>• Develop IMPLAN Impact Model</td>
<td>• Final report</td>
</tr>
<tr>
<td>• Survey implementation</td>
<td></td>
<td>• Final presentation</td>
</tr>
</tbody>
</table>

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.**

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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*

![Survey Respondent Age](image)

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*

![Survey Respondent Household Income](image)
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

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

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**

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

<table>
<thead>
<tr>
<th>Miles</th>
<th>Pct</th>
<th>Cumulative Pct</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Luis Obispo</td>
<td>30</td>
<td>15%</td>
</tr>
<tr>
<td>Ventura/Santa Barbara</td>
<td>121</td>
<td>4%</td>
</tr>
<tr>
<td>Bakersfield (Southern Central Valley)</td>
<td>137</td>
<td>17%</td>
</tr>
<tr>
<td>Fresno Area</td>
<td>149</td>
<td>19%</td>
</tr>
<tr>
<td>Monterey Bay</td>
<td>154</td>
<td>2%</td>
</tr>
<tr>
<td>Los Angeles Basin</td>
<td>177</td>
<td>12%</td>
</tr>
<tr>
<td>Mojave/High Desert</td>
<td>182</td>
<td>1%</td>
</tr>
<tr>
<td>South Bay (Peninsula)</td>
<td>197</td>
<td>8%</td>
</tr>
<tr>
<td>Riverside/San Bernbnardino</td>
<td>230</td>
<td>3%</td>
</tr>
<tr>
<td>East Bay</td>
<td>237</td>
<td>5%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>249</td>
<td>2%</td>
</tr>
<tr>
<td>Orange</td>
<td>250</td>
<td>1%</td>
</tr>
<tr>
<td>North Bay (Marin County/North Coast)</td>
<td>259</td>
<td>2%</td>
</tr>
<tr>
<td>Sacramento</td>
<td>306</td>
<td>3%</td>
</tr>
<tr>
<td>San Diego</td>
<td>320</td>
<td>1%</td>
</tr>
<tr>
<td>Out of State</td>
<td>320+</td>
<td>5%</td>
</tr>
</tbody>
</table>

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*

<table>
<thead>
<tr>
<th>Type of Camping</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trailer /5th Wheel</td>
<td>55%</td>
</tr>
<tr>
<td>RV</td>
<td>9%</td>
</tr>
<tr>
<td>Tent</td>
<td>32%</td>
</tr>
<tr>
<td>Truck Camper</td>
<td>4%</td>
</tr>
</tbody>
</table>

### 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*

<table>
<thead>
<tr>
<th>Days of Stay</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Night</td>
<td>7%</td>
</tr>
<tr>
<td>2</td>
<td>30%</td>
</tr>
<tr>
<td>3</td>
<td>33%</td>
</tr>
<tr>
<td>4</td>
<td>13%</td>
</tr>
<tr>
<td>5</td>
<td>9%</td>
</tr>
<tr>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>7</td>
<td>2%</td>
</tr>
<tr>
<td>8+</td>
<td>3%</td>
</tr>
</tbody>
</table>

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](image)

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*

<table>
<thead>
<tr>
<th>Overnight Visitors</th>
<th>%</th>
<th>Day Visitors</th>
<th>%</th>
<th>SLOC Residents</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATV Riding</td>
<td>67</td>
<td>ATV Riding</td>
<td>60</td>
<td>Beach Bonfires</td>
<td>59</td>
</tr>
<tr>
<td>Beach Bonfires</td>
<td>60</td>
<td>Jeep/Dune Buggy</td>
<td>41</td>
<td>Sunsets</td>
<td>57</td>
</tr>
<tr>
<td>Sunsets</td>
<td>58</td>
<td>Beach Bonfires</td>
<td>40</td>
<td>Jeep/DuneBuggy</td>
<td>49</td>
</tr>
<tr>
<td>Running/Walking</td>
<td>54</td>
<td>Picknicking</td>
<td>40</td>
<td>Walking/Running</td>
<td>49</td>
</tr>
<tr>
<td>Photography (Tied)</td>
<td>45</td>
<td>Sunsets (Tied)</td>
<td>39</td>
<td>ATV Riding</td>
<td>43</td>
</tr>
<tr>
<td>Swimming /Wading (Tied)</td>
<td>45</td>
<td>Walking/running (Tied)</td>
<td>39</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

A significant percentage of visitors from outside the county indicate they would not visit the area if the District did not exist.
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging Expenses</td>
<td>Hotels/Motels, Bed &amp; Breakfast, Campgrounds/Lodging Rentals</td>
</tr>
<tr>
<td>Day Use Fees</td>
<td>Oceano Dunes SVRA, Pismo State Beach</td>
</tr>
<tr>
<td>Food &amp; Beverages</td>
<td>Restaurants, Bars</td>
</tr>
<tr>
<td>Transportation Expenses</td>
<td>Gas, Oil, Repairs, Districting Fees, Public Transportation</td>
</tr>
<tr>
<td>Retail Shopping</td>
<td>Souvenirs, Gifts, Groceries, Equipment Purchases, Film, Bait, Supplies, etc.</td>
</tr>
<tr>
<td>Recreation Activities</td>
<td>Rentals, Lessons, Tours, Guides, Admission Fees, Cover Charges, Services, etc.</td>
</tr>
<tr>
<td>Any Other Expenses</td>
<td>Other Spending</td>
</tr>
</tbody>
</table>
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 20016/17 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**

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**

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.
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](image)

<table>
<thead>
<tr>
<th>Total Impact</th>
<th>Day Visitor Impact</th>
<th>Overnight Visitor Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Effect</td>
<td>$158,861,742</td>
<td>$14,330,474</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>$38,135,136</td>
<td>$3,319,772</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>$46,584,041</td>
<td>$4,483,473</td>
</tr>
<tr>
<td>Total Effect</td>
<td>$243,580,919</td>
<td>$22,133,719</td>
</tr>
</tbody>
</table>

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*

<table>
<thead>
<tr>
<th>Total Economic Output-Top 5:</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food services and drinking places</td>
<td>$52,280,980</td>
</tr>
<tr>
<td>Accommodations</td>
<td>$45,009,338</td>
</tr>
<tr>
<td>Recreation</td>
<td>$14,715,194</td>
</tr>
<tr>
<td>Retail Stores - General merchandise</td>
<td>$11,480,813</td>
</tr>
<tr>
<td>Misc. Other</td>
<td>$11,277,633</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day Visitor Economic Output-Top 5:</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food services and drinking places</td>
<td>$6,227,617</td>
</tr>
<tr>
<td>Use Fees</td>
<td>$3,239,500</td>
</tr>
<tr>
<td>Recreation</td>
<td>$1,765,499</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$1,363,051</td>
</tr>
<tr>
<td>Retail Stores - General merchandise</td>
<td>$1,325,770</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overnight Visitor Economic Impact-Top 5:</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food services and drinking places</td>
<td>$46,007,140</td>
</tr>
<tr>
<td>Accommodations</td>
<td>$39,608,112</td>
</tr>
<tr>
<td>Recreation</td>
<td>$12,949,336</td>
</tr>
<tr>
<td>Real estate rentals etc.</td>
<td>$12,247,851</td>
</tr>
<tr>
<td>Retail Stores - General merchandise</td>
<td>$9,924,290</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th>Total Impact:</th>
<th>Day Visitor Impact:</th>
<th>Overnight Visitor Impact:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Effect</td>
<td>2,612.9</td>
<td>Direct Effect</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>312.6</td>
<td>Indirect Effect</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>376.6</td>
<td>Induced Effect</td>
</tr>
<tr>
<td>Total Effect</td>
<td>3,302.1</td>
<td>Total Effect</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Total Employment-Top 5:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Food services and drinking places</td>
<td>960</td>
</tr>
<tr>
<td>Other recreation industries</td>
<td>499</td>
</tr>
<tr>
<td>Accommodations</td>
<td>468</td>
</tr>
<tr>
<td>Other Misc</td>
<td>327</td>
</tr>
<tr>
<td>Use Fees</td>
<td>233</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day Visitor Employment-Top 5:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Food services and drinking places</td>
<td>114</td>
</tr>
<tr>
<td>Other recreation industries</td>
<td>60</td>
</tr>
<tr>
<td>Use Fees</td>
<td>39</td>
</tr>
<tr>
<td>Misc Other</td>
<td>27</td>
</tr>
<tr>
<td>Retail Stores</td>
<td>17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overnight Visitor Employment-Top 5:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Food services and drinking places</td>
<td>844</td>
</tr>
<tr>
<td>Other recreation industries</td>
<td>106</td>
</tr>
<tr>
<td>Accommodations</td>
<td>81</td>
</tr>
<tr>
<td>Other Misc</td>
<td>55</td>
</tr>
<tr>
<td>Use Fees</td>
<td>30</td>
</tr>
</tbody>
</table>

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

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

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/5ª 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
- Picnic
- 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, contáctenme 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**

<table>
<thead>
<tr>
<th>Month</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2016</td>
<td>280,802</td>
</tr>
<tr>
<td>Aug</td>
<td>207,546</td>
</tr>
<tr>
<td>Sept</td>
<td>162,090</td>
</tr>
<tr>
<td>Oct</td>
<td>138,607</td>
</tr>
<tr>
<td>Nov</td>
<td>176,354</td>
</tr>
<tr>
<td>Dec</td>
<td>135,615</td>
</tr>
<tr>
<td>Jan 2017</td>
<td>113,302</td>
</tr>
<tr>
<td>Feb</td>
<td>82,968</td>
</tr>
<tr>
<td>March</td>
<td>123,051</td>
</tr>
<tr>
<td>April</td>
<td>145,704</td>
</tr>
<tr>
<td>May</td>
<td>148,886</td>
</tr>
<tr>
<td>June</td>
<td>204,281</td>
</tr>
<tr>
<td>July</td>
<td>294,450</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,213,656</strong></td>
</tr>
</tbody>
</table>

2. **Eliminate local in-county residents 15%**

   \[2,213,656 \times 0.85 = 1,881,607\]

3. **Determine the number of travel parties**

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

4. **Travel Party Trip Expenditure by Category**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging expenses</td>
<td>$262</td>
</tr>
<tr>
<td>Day Use Fees</td>
<td>$86</td>
</tr>
<tr>
<td>Food &amp; beverages</td>
<td>$296</td>
</tr>
<tr>
<td>Transportation expenses</td>
<td>$229</td>
</tr>
<tr>
<td>Retail shopping</td>
<td>$224</td>
</tr>
<tr>
<td>Recreation activities</td>
<td>$157</td>
</tr>
<tr>
<td>Any other expenses</td>
<td>$135</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,389</strong></td>
</tr>
</tbody>
</table>

*Numbers may not foot due to rounding