



California Welcome Center  
Oceanside



# HORIZON

CONSUMER SCIENCE

## Visitor Profile/Economic & Fiscal Impacts Study – CY2012

May, 2013



# **Executive Summary**

# Study Overview

## Background & Objectives

- Visit Oceanside is the city's official entity for marketing Oceanside as a destination to non-local visitors and it also operates the California Welcome Center (CWC) Oceanside.
- Visit Oceanside conducted research in order to estimate the economic (and fiscal) impacts of its marketing and the CWC to and in Oceanside, and to obtain a profile of visitors using the CWC and/or requesting Visit Oceanside materials (e.g., Visitor Guide, brochures) when planning their trip.
  - This study does not measure the economic and fiscal impacts of *total* Oceanside tourism, but rather the impacts of the CWC and related destination materials that *influenced* a visit to Oceanside.
- Similar research was conducted for Visit Oceanside in 2009. The results of these two studies are presented herein, and can be compared to track change and growth in Oceanside's visitor market.

## Study Method

- The research targeted the trip behaviors of two specific visitor subsegments of Oceanside's overall visitor population:
  - visitors at the Oceanside CWC, who completed an *on-site* computer survey, and;
  - visitors requesting destination information from Visit Oceanside, who were invited to an *on-line* survey
- Therefore, visitors who did not request destination materials or stop at the CWC are excluded from this analysis.

# Summary of Findings - Huge Growth in 3+ years

- Oceanside experienced a remarkable increase in volume and impacts of visitation as influenced by the Oceanside California Welcome Center (CWC) and mailed materials from Visit Oceanside in 2012 over 2009 when a similar study was conducted. We attribute this to several factors:
  - The earlier study was conducted during the depth of the 2008-2010 economic recession when tourism everywhere had fallen to levels not seen in some years. Related factors then included shorter trips, lower overall spending by those who did travel, in particular discounted hotel rates to attract guests. All these factors have reversed since that time.
  - Transition of Visit Oceanside to an independent marketing organization was completed after 2008/09. The positive results in 2012 are as likely attributable to more targeted and effective marketing as an improved visitor market.
  - Reported shift by Visit Oceanside to a greater emphasis on electronic internet and social media marketing.
  - Both *more contacts* with visitors through VO and the CWC in 2012 than in 2009, and a *higher rate of influence* of the materials/contacts on actual visits to Oceanside.

# Summary of Findings – Data Use & Visitation

## Similarities & Differences of CWC and VO Users

- We found that many CWC walk-ins seek more County-wide travel information (then head elsewhere), whereas those requesting information from Visit Oceanside pre-trip are more specifically focused on Oceanside itself.
  - Thus, this suggests that the trips by those who actually visit after requesting VO information tend to be more “Oceanside-focused,” whereas CWC users’ trips tend to be more region-wide.
- The results also suggest that travel information has the most impact on decisions being made at the time:
  - for those in the planning phase, the decision about whether or not to visit Oceanside;
  - for those already in the area who stop at the CWC, decisions about where to go and what to see in the immediate area.
- Fewer who came to the CWC after requesting information from VO were satisfied with the CWC offerings than those walking in not having received prior information.
  - This suggests that they may be seeking additional, different information once in the area (at the CWC) that they didn’t already receive through the mail response.
- Some **similarities** appear between the CWC walk-in visitors and those who requested mail/web information from VO: both are older (age 50), middle income and mainly from out of California.
- Some **differences** between these two segments include: CWC walk-in groups are slightly smaller with more couples than family groups, visit fewer attractions in the area but stay longer. More of those who received information via web/mail visited and stayed in Oceanside.

# Visitor Volume & Visitor Days

This section summarizes the 2012 results and compares to the prior 2009<sup>1</sup> study, as shown in parentheses (next to the 2012 results). As shown below and following, all indicators reflect notable increases in 2012 over 2009.

- In total, an estimated 112,200 (versus 88,300 in 2009) individual visitors were directly influenced to visit Oceanside due to destination materials mailed or received on-site at the CWC. This is a 27% total increase.
- Of the total:
  - 82,800 (66,300), or 74% (75%) of the visitors stayed overnight in Oceanside, up 25%.
  - 29,400 (22,000), or 26% (25%) were day-only visitors, a 33% rise.
- Overall, visitors averaged trips of 4.7 (3.4) days in Oceanside, 38% growth.
- As a result, they accounted for 522,600 (298,900) visitor days<sup>2</sup> an amazing 75% rise, driven by both the much higher visitor volume and the longer stays in Oceanside.
- Each visitor group averaged 2.8 persons.

<sup>1</sup> The 2009 study was conducted on a fiscal year basis for the period July 2008 – June 2009. The 2012 study covers calendar year January - December. They are comparable on an annualized basis.

<sup>2</sup> Visitor days are the number of visitors times the number of days; 2 visitors in the area for three days = 6 visitor days.

# Economic Impacts

## Spending

- Visitors who were influenced to visit the area by the information they received spent an annual total of \$61,375,700 (\$19,869,000) specifically in Oceanside, a surge of 194%.
- This spending averaged:
  - \$117.45 (\$69.80) daily per-visitor
  - \$547.05 ( \$236.35) per visitor during their stay in Oceanside
  - \$1,400 (\$664) per visitor *group* during their stay in Oceanside
- Oceanside *overnight* visitors spent \$59.4 (\$19.9) million in total or \$120 (\$72) daily per visitor
- Oceanside *day* visitors spent \$2.0 million (\$955,000) in total or \$68 (\$43) daily per visitor

# Fiscal Impacts and Local Employment

## Taxes/Fiscal Impacts

- An estimated \$41.8 (\$12.3) million of visitor spending was taxable, and generated an estimated \$1.7 million (\$598,900) in lodging and retail sales taxes to the City of Oceanside.
- Of the taxes,
  - \$1.4 million (\$528,400) was lodging tax
  - \$272,800 (\$70,500) was sales tax for meals, beverages and retail items purchased in Oceanside.

## Employment Supported

- These visitors supported an estimated 676 (400) Oceanside jobs in fiscal 2012.



# Summary Comparison VO Influenced Volume & Impacts

Category	2008	2012	Percent Change
<b>Visitor Group Contacts</b>	104,700	108,556	17.3%
<b>Groups Visiting</b>	31,400	41,296	39.5%
<b>Influence Rate</b>	30.0%	38.0%	--
<b>Visitor Volume</b>			
Overnight Visitors	66,274	82,842	25.0%
Day Visitors	22,027	29,352	33.3%
<b>Total Volume</b>	<b>88,301</b>	<b>112,194</b>	<b>27.1%</b>
<b>Visitor Days</b>			
Overnight Visitor - Days	276,915	493,206	78.1%
Day Visitors - Days	22,027	29,352	33.3%
<b>Total Visitor Days</b>	<b>298,942</b>	<b>522,558</b>	<b>74.8%</b>
<b>Length of Stay (In Oceanside)</b>			
Overnight Visitor - LOS	4.18	5.95	42.3%
Day Visitors - LOS	1.00	1.00	0.0%
<b>Total Visitor - LOS</b>	<b>3.39</b>	<b>4.66</b>	<b>37.6%</b>
<b>Per-capita Daily Spending</b>			
Overnight Visitor	\$ 71.91	\$ 120.39	67.4%
Day Visitors -	\$ 43.36	\$ 68.05	57.0%
<b>Total Visitor Daily</b>	<b>\$ 69.81</b>	<b>\$ 117.45</b>	<b>68.3%</b>
<b>Aggregated Total Visitor Spending</b>			
Overnight Visitor	\$ 19,913,390	\$ 59,378,264	198.2%
Day Visitors	\$ 955,010	\$ 1,997,465	109.2%
<b>Total Visitor Spending</b>	<b>\$ 20,868,400</b>	<b>\$ 61,375,729</b>	<b>194.1%</b>

# Visitor Profile: Similarities

- CWC walk-in guests and people requesting information from Visit Oceanside share some of the same demographics:
  - They skew older (average age over 50)
  - are of middle-income (average \$70K household income),
  - the majority are U.S. residents from out of state.
    - However somewhat more walk-in guests at the CWC were from either California (28% vs. 21%) or foreign countries (19% vs. 10%) than those requesting VO information.
- However, the Southern California trips these two groups take form distinct profiles, as noted on the following slides:

# Visitor Profile: CWC Walk-In Guests

*CWC Walk-In Guests . . .* (as compared to those requesting from VO)

- Travel in smaller groups (2.4 average size)
- 45% travel as a couple, 35% travel with family (including 23% with children) and 13% travel alone.
- Most (74%) are visiting the San Diego area, with about half (54%) of all these visitors making a specific visit to Oceanside.
- When they visit Oceanside, they tend to visit fewer local attractions than those who had sent in for information.
  - While 34% of the visitors stay overnight in Oceanside, more (54%) stay in the San Diego area, and (49%) stay in other parts of California
- Make longer trips (14 night average)
- Those who do stay overnight in Oceanside stay longer (6.5 nights average).
  - More stay in a vacation rental (43%).
  - Another 23% stay in either a private residence or a campground.
  - 25% stay in a hotel/motel

# Visitor Profile: Requested Information from VO

*People Requesting Information from Visit Oceanside Traveling to Southern California (as compared to visitors using the Oceanside CWC). . .*

- Travel in larger groups (3.1 average size), with 49% traveling with family members (including 33% with children), 39% traveling as a couple, and only 5% traveling alone.
- Almost all (93%) make a specific visit to Oceanside, with most (80%) also visiting the San Diego area.
  - When they visit Oceanside, they tend to visit more attractions.
- Make shorter trips (9 nights average), but 75% stay overnight in Oceanside.
- Those who do stay overnight in Oceanside stay for fewer nights (4.9 nights), and are also most often to stay in a vacation rental (45%).
  - More are likely than CWC walk-in guests to stay in a hotel/motel (38%).
  - Note that although their stay is shorter than CWC users, it is longer than for some other California destinations we have researched, likely due to the higher share staying in vacation rentals and/or private homes who tend to stay longer than hotel guests.
- **Overall, the data suggest that more people who actually visit after requesting VO information tend to make “Oceanside-focused” trips, whereas CWC users tend to take trips more regional in scope.**

# High Satisfaction and Influence with CWC & VO

## ■ Evaluation of CWC & Visit Oceanside Services and Facilities

- Over 90% of visitors were highly satisfied with the CWC facility and staff including staff service, information and maps, parking and restrooms, and the free internet service.
  - Not quite 80% were highly satisfied with the selection of gifts and souvenirs, suggesting a review of these offerings.
- Visitors mainly stop by the CWC for maps and brochures, information on Oceanside and regional attractions/activities, and the rest rooms.
- Three quarters (74%) report finding everything they were seeking there.

## ■ CWC and Visit Oceanside Marketing Influence

### CWC Visit/Info

- 74% of all on-site CWC visitors were influenced to change aspects of their trip to Oceanside by the CWC's information and services:
  - To visit an Oceanside attraction or additional attractions, or just to stay a few hours longer.
  - However, only 11% of those were influenced to stay overnight or add nights in Oceanside.
- 54% of on-site visitors made a specific visit to Oceanside and 34% stayed overnight.

### Visit Oceanside Info

- Of all potential visitors receiving information from Visit Oceanside, 57% actually visited Southern California, 53% visited Oceanside, and 43% stayed overnight in Oceanside.
- 85% of those visiting Oceanside said the Visit Oceanside information influenced their decision to visit; however, once they had made their trip plans, only 24% felt that the VO information continued to influence their specific plans for visiting Oceanside.
- While on their trip, 25% of those visiting Oceanside also stopped by the CWC.



# **Detailed Findings**

**Economic and Fiscal Impacts**

# Visitor Volume and Visitor Days

In order to estimate visitor volume and influence of the CWC and VO materials, we relied on CWC attendance and VO web-contact and mailing data, as well as the direct visitor surveys at the CWC and by internet.

- In 2012 (calendar year), the Oceanside California Welcome Center (CWC) served an estimated (gross total) total of 91,800 walk-in visitor groups versus 77,800 in 2009 (fiscal year).
- In addition, 20,700 households either received Visit Oceanside mailed destination material packets or requested travel information via VO's website or social media in 2012, versus 26,900 in 2009.
- Accounting for some groups that did both, in 2012, VO and the CWC had contact with 108,500 (104,700 in 2009) unique visitor groups.
- Of those groups, 41,300 (31,424) groups were influenced by their contact or materials and visited Oceanside, an influenced visit rate of 38.0%, versus 30.0% in 2009.

# Oceanside Visitor Volume and Visitor Days

- The CWC on-site visits and visitor information requests resulted in nearly 112,200 (88,300) individual visitors influenced to visit Oceanside due to these sources, of which three quarters 74% (75%) are overnight visitors.
- Overall they report spending nearly 5 (3.3) days in Oceanside; overnight visitors average nearly 6 (4) days there.
- As a result, these visitors accounted for over half a million visitor (298,900) days in Oceanside.
- Each group averaged 2.6 (2.8) persons.

Category	Individual Visitors	Ratio	Avg. Days	Total Visitor Days	Ratio	Group Size (persons)
<b>2012</b>						
Overnight Visitors	82,842	73.8%	5.95	493,206	94.4%	2.70
Day Visitors	29,352	26.2%	1.00	29,352	5.6%	2.23
<b>Total</b>	<b>112,194</b>	<b>100.0%</b>	<b>4.66</b>	<b>522,558</b>	<b>100.0%</b>	<b>2.56</b>
<b>2009</b>						
Overnight Visitors	66,270	75.1%	4.18	276,915	92.6%	2.81
Day Visitors	22,030	24.9%	1.00	22,027	7.4%	2.81
<b>Total</b>	<b>88,300</b>	<b>100.0%</b>	<b>3.39</b>	<b>298,942</b>	<b>100.0%</b>	<b>2.81</b>



# Visitor Spending

- Based on spending reported by visitors when surveyed, those who were influenced to visit the area due to VO information spent a total of \$61,375,700 (\$20,869,000) in Oceanside. This is further discussed below and shown in the table on next slide.
- Total spending by day versus overnight visitors is as follows:
  - \$59.4 (\$19.9) million by overnight Oceanside visitors, accounting for 97% (95%) of the total influenced visitor spending
  - \$2.0 million (\$955,000) by day visitors or 3% (5%) of the total influenced visitor spending
- This spending averages:
  - \$117.45 (\$69.81) daily per-visitor
  - \$547.05 (\$236.34) per visitor during their entire stay in Oceanside
  - \$1,400 (\$664) per visitor *group* during their entire stay in Oceanside
- Daily per-visitor spending by day versus overnight visitors is as follows:
  - \$120.39 (\$71.91) by each Oceanside overnight visitor
  - \$68.05 (\$43.36) by each Oceanside day visitor

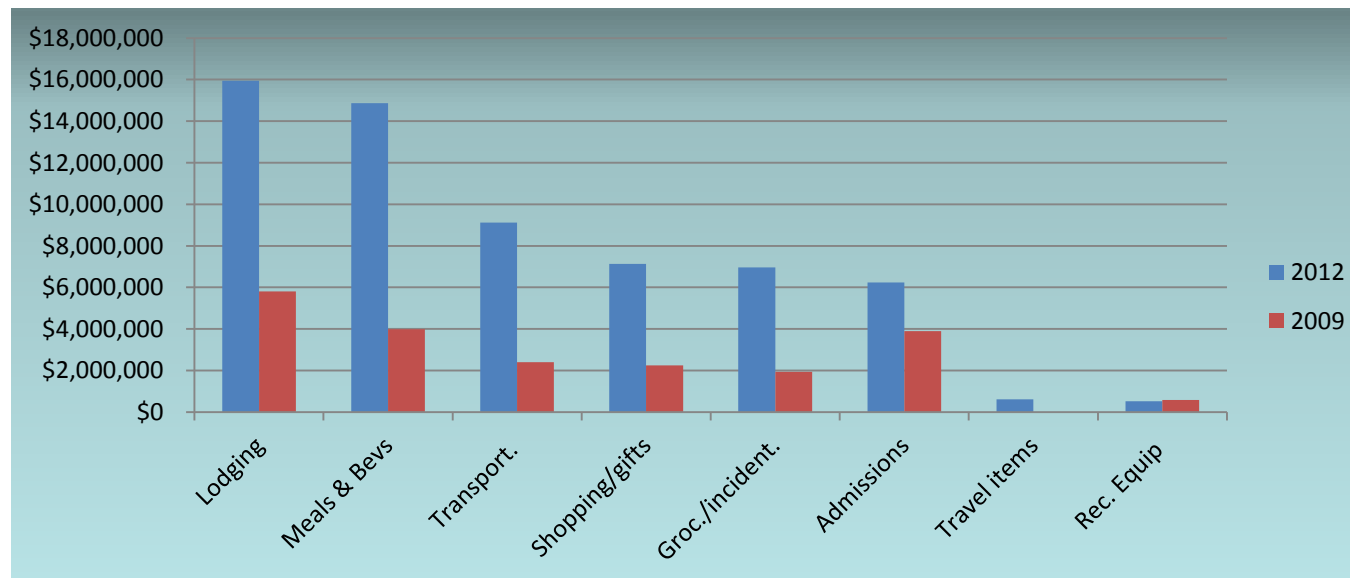
# Oceanside Visitor Spending

Visitor Category	Daily Per Capita Spending	Avg. Spent in Oceanside per Visitor	Per Group Spending in Oceanside	Total Annual Expenditures	Ratio
<b>2012</b>					
Overnight Visitors	\$ 120.39	\$ 716.76	\$ 1,935.39	\$ 59,378,264	96.7%
Day Visitors	\$ 68.05	\$ 68.05	\$ 151.90	\$ 1,997,465	3.3%
<b>Total</b>	<b>\$ 117.45</b>	<b>\$ 547.05</b>	<b>\$ 1,400.31</b>	<b>\$ 61,375,729</b>	100.0%
<b>2009</b>					
Overnight Visitors	\$ 71.91	\$ 300.49	\$ 844.32	\$ 19,913,400	95.4%
Day Visitors	\$ 43.36	\$ 43.35	\$ 121.83	\$ 955,000	4.6%
<b>Total</b>	<b>\$ 69.81</b>	<b>\$ 236.34</b>	<b>\$ 664.09</b>	<b>\$ 20,868,400</b>	100.0%

# Visitor Spending by Category

Spending Category	2012			2009		
	Spending Per Visitor*	Total Annual Expenditures	Spending Ratio	Spending Per Visitor*	Total Annual Expenditures	Spending Ratio
Lodging	\$ 30.50	\$ 15,938,140	26.0%	\$ 65.83	\$ 5,812,400	27.9%
Meals & Beverages/Snacks	\$ 28.45	\$ 14,865,758	24.2%	\$ 45.14	\$ 3,985,500	19.1%
Local transportation/parking	\$ 17.45	\$ 9,118,319	14.9%	\$ 27.11	\$ 2,394,200	11.5%
Shopping/gifts	\$ 13.64	\$ 7,125,510	11.6%	\$ 25.53	\$ 2,254,100	10.8%
Groceries/incidentals	\$ 13.32	\$ 6,960,981	11.3%	\$ 21.94	\$ 1,937,200	9.3%
Admissions/recreation activities	\$ 11.92	\$ 6,230,683	10.2%	\$ 44.19	\$ 3,902,100	18.7%
Travel-related items (maps, etc.)	\$ 1.19	\$ 619,281	1.0%	n/a	n/a	n/a
Rec. Equipment/Supplies	\$ 0.99	\$ 517,058	0.8%	\$ 6.61	\$ 583,500	2.8%
<b>Total</b>	<b>\$ 117.46</b>	<b>\$ 61,375,729</b>	<b>100.0%</b>	<b>\$ 236.35</b>	<b>\$ 20,869,000</b>	<b>100.0%</b>

\*Spending allocated across all visitors whether or not all visitors spent in that category.



# Visitor Spending by Category

2012

Spending Category	Overnight Visitors			Day Visitors		
	Daily Per Capita	Ratio	Total Annual	Daily Per Capita	Ratio	Total Annual
Lodging	\$ 32.32	26.8%	\$ 15,938,140	\$ -	0.0%	\$ -
Meals & Beverages/Snacks	\$ 28.86	24.0%	\$ 14,236,121	\$ 21.45	31.5%	\$ 629,637
Admissions/Rec. Activities	\$ 12.09	10.0%	\$ 5,963,530	\$ 9.10	13.4%	\$ 267,153
Local Transport/Parking	\$ 17.35	14.4%	\$ 8,556,312	\$ 19.15	28.1%	\$ 562,007
Groc./Conv./Incidentals	\$ 13.68	11.4%	\$ 6,746,956	\$ 7.29	10.7%	\$ 214,025
Shopping/gifts	\$ 13.94	11.6%	\$ 6,873,029	\$ 8.60	12.6%	\$ 252,480
Rec. Equipment/Supplies	\$ 1.04	0.9%	\$ 511,812	\$ 0.18	0.3%	\$ 5,246
Travel-related items (maps, etc.)	\$ 1.12	0.9%	\$ 552,363	\$ 2.28	3.4%	\$ 66,918
<b>Total</b>	<b>\$ 120.40</b>	<b>100.0%</b>	<b>\$ 59,378,264</b>	<b>\$ 68.05</b>	<b>100.0%</b>	<b>\$ 1,997,465</b>

2008/09

Spending Category	Overnight Visitors			Day Visitors		
	Daily Per- Capita	Ratio	Total Annual	Daily Per- Capita	Ratio	Total Annual
Lodging	\$ 20.99	29.2%	\$ 5,812,449	\$ -	0.0%	\$ -
Meals & Beverages/snacks	\$ 13.45	18.7%	\$ 3,725,448	\$ 11.81	27.2%	\$ 260,080
Admissions/Rec. Activities	\$ 13.23	18.4%	\$ 3,664,100	\$ 10.80	24.9%	\$ 237,960
Daily Transport/Parking	\$ 8.03	11.2%	\$ 2,224,620	\$ 7.70	17.8%	\$ 169,532
Groc./Conv./Incidentals	\$ 6.58	9.2%	\$ 1,822,439	\$ 5.21	12.0%	\$ 114,798
Shopping/gifts	\$ 7.61	10.6%	\$ 2,106,324	\$ 6.71	15.5%	\$ 147,728
Rec. Equipment/Supplies	\$ 2.02	2.8%	\$ 558,614	\$ 1.13	2.6%	\$ 24,914
<b>Total</b>	<b>\$ 71.91</b>	<b>100.0%</b>	<b>\$ 19,913,993</b>	<b>\$ 43.36</b>	<b>100.0%</b>	<b>\$ 955,011</b>

# Fiscal Impacts

- The spending by influenced visitors detailed above generated tax revenues to the City of Oceanside and to the state of California as discussed below.
- Of the \$61.4 (\$20.9) million in total visitor spending influenced by Oceanside information and the CWC, \$41.8 (\$12.3) million are taxable\* Of this taxable visitor spending, the City of Oceanside realized an estimated \$1.7 million (\$599,000) in taxes.
  - Of the Oceanside taxes realized, \$1.4 million (\$528,400), or 84% (88%) were from the Oceanside transient occupancy (lodging) tax (TOT).
  - In fiscal year 2012, the City of Oceanside collected a total of \$3.8 (\$3.1) million in TOT. Thus, our estimates account for 36% (17%) of the City's total TOT for FY 2012.
  - The remaining \$272,800 (\$70,500), or 15.8% (11.8%) of the total was from the 7.75% tax charged on retail items and food and beverage sales and some transportation spending.
- Another \$1.8 million (\$546,800) was generated to the State of California from the visitor related retail and meal and beverage taxes; the state does not impose a lodging tax.

\*admission fees, equipment rentals, groceries and some transportation costs are tax-exempt in California and locally.

# Fiscal Impacts

## 2012

Taxable Category	Net Taxable Total Spending	Oceanside Tax Revenues	Oceanside Tax Ratio	Net State Tax Revenue	Total State & Local Tax Revenues	State and Local Tax Ratio
Lodging	\$ 14,489,000	\$ 1,448,900	84.2%	\$ -	\$ 1,448,900	40.7%
Meals & Beverages/Snacks	\$ 12,625,000	\$ 126,300	7.3%	\$ 852,100	\$ 978,400	27.5%
Admissions/Rec. Activities	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Daily Transport/Parking	\$ 4,231,000	\$ 42,300	2.5%	\$ 285,600	\$ 327,900	9.2%
Groc./Conv./Incidentals	\$ 3,230,000	\$ 32,300	1.9%	\$ 218,000	\$ 250,300	7.0%
Shopping/gifts	\$ 6,613,000	\$ 66,100	3.8%	\$ 446,400	\$ 512,500	14.4%
Rec. Equipment/Supplies	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Travel-related items (maps, etc.)	\$ 575,000	\$ 5,800	0.3%	\$ 38,800	\$ 44,600	1.3%
<b>Total</b>	<b>\$ 41,763,000</b>	<b>\$ 1,721,700</b>	<b>100.0%</b>	<b>\$ 1,840,900</b>	<b>\$ 3,562,600</b>	<b>100.0%</b>

## 2009

Taxable Category	Net Taxable Total Spending	Oceanside Tax Revenue	Oceanside Tax Ratio	Net State Tax Revenue	Total State & Local Tax Revenues	State & Local Tax Ratio
Lodging	\$ 5,284,000	\$ 528,400	88.2%	\$ -	\$ 528,400	46.1%
Meals, beverages/ snacks	\$ 3,356,000	\$ 33,600	5.6%	\$ 260,100	\$ 293,700	25.6%
Local Transport/Parking	\$ 734,000	\$ 7,300	1.2%	\$ 56,900	\$ 64,200	5.6%
Groc./Conv./Incidentals	\$ 891,000	\$ 8,900	1.5%	\$ 69,100	\$ 78,000	6.8%
Shopping/gifts	\$ 2,073,000	\$ 20,700	3.5%	\$ 160,700	\$ 181,400	15.8%
<b>Total</b>	<b>\$ 12,338,000</b>	<b>\$ 598,900</b>	<b>100.0%</b>	<b>\$ 546,800</b>	<b>\$ 1,145,700</b>	<b>100.0%</b>

# Jobs Supported

The spending by influenced visitors supported a variety of jobs in Oceanside as discussed below and shown in the next table.

- Oceanside has a workforce estimated at 40,000 – 45,000 employees. \*
- Visitors influenced to visit Oceanside supported an estimated 676 (400 in 2009) jobs in 2012.
- More of the jobs and the biggest rise was in food and beverage services (restaurants/snack bars) with 217 jobs, up from 129 in 2009 followed by 124 (187) jobs in the lodging sector.

\*San Diego Association of Governments (Sandag), employment forecasts. [www.sandag.org](http://www.sandag.org)

# Jobs Supported

Spending Category	Oceanside Jobs Supported 2012		Oceanside Jobs Supported 2009	
	Number	Ratio	Number	Ratio
Lodging	124	18.3%	187	46.5%
Meals & Beverages/Snacks	217	32.1%	129	31.9%
Admissions/Rec. Activities	58	8.6%	54	13.3%
Daily Transport/Parking	59	8.8%	2	0.6%
Groceries/incidentals	102	15.1%	11	2.6%
Shopping/gifts	99	14.7%	12	3.1%
Rec. Equipment Rentals	8	1.1%	8	2.0%
Travel-related items (maps, etc.)	9	1.3%	n/a	n/a
<b>Total</b>	<b>676</b>	<b>100.0%</b>	<b>403</b>	<b>100.0%</b>





# Detailed Findings

Visitor Profile

# Visit Oceanside Informs Visits to Oceanside (and Southern California)

- Of all those requesting travel information from Visit Oceanside (via website, phone or mail), more than half (57%) actually made a trip to Southern California and 53% visited Oceanside
  - This conversion rate is lower than in FY2009, when 82% of those receiving an Oceanside Visitors Guide made a trip and 74% visited Oceanside.
  - Not surprisingly, the closer the origin the higher the visitation rate, ranging from 46% by international visitors, and 56% for those from Other U.S. areas, to 66% for California residents.

## (q4) Did you actually visit Oceanside or Southern California after requesting destination information from Visit Oceanside?

	Total	Residence		
		CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>428</b>	<b>88</b>	<b>296</b>	<b>44</b>
Didn't make a trip	43.2%	34.1%-	44.3%	54.5%
<b>Made a trip to SoCal</b>	<b>56.8%</b>	<b>65.9%+</b>	<b>55.7%</b>	<b>45.5%</b>
Visited Oceanside	52.8%	63.6%+	51.0%	43.2%

# Some Received Information, but Haven't Visited Southern California

- The remaining 43% of people requesting travel information (via web, mail, or phone) did not make a visit to SoCal.
  - However, 55% of these are either still intending to make a trip there or 21% had already visited prior to requesting information.
  - This suggests that the travel information available through Visit Oceanside is overwhelmingly reaching actual visitors – whether past, present, or future.

## (q5B) Why *didn't* you make the trip? (INTERNET ONLY)

	Total	Residence		
		CA	Other US	Int'l
<b>Full Base: Did not visit Oceanside/SC</b>	<b>185</b>	<b>30</b>	<b>131</b>	<b>24</b>
Still plan to visit but not yet scheduled	54.6%	60.0%	52.7%	58.3%
I DID make a trip to So. California, but before I requested information from Visit Oceanside	20.5%	30.0%	17.6%	25.0%
Postponed to a later time	16.2%	3.3%-	16.8%	29.2%
Went elsewhere	8.6%	6.7%	9.2%	8.3%
Cancelled my/our plans	1.1%	0.0%	1.5%	0.0%
Other	12.4%	3.3%-	14.5%	12.5%

# Influence of CWC/VO Materials and Services

- Those requesting information from Visit Oceanside who actually visited Oceanside rated the influence of that information in their decision to visit there.
  - 85% of this group (labeled “Internet” on the following slides) believed the information to be at least somewhat influential.
    - On average, this group rated the Visit Oceanside information as between ‘Somewhat influential’ and ‘Very influential’ in their decision to visit Oceanside
    - However, only 24% of this group thought this information was instrumental in shaping what they actually did in Oceanside
- People stopping at the CWC Oceanside rated the influence of the information and services they obtained there in shaping their visit to Oceanside.
  - 74% of this group (labeled “On-site” on the following slides) rated the information/services to be at least somewhat influential (versus 85% in FY2009),
  - 19% were still unsure whether they were going to act on the information/services
    - Note that the influence rate of the CWC would have likely been higher if we had intercepted visitors at the END of their trip.
- These results suggest that travel information has most impact on decisions being made at the time:
  - Those who haven’t left on their trip yet are just making the decision whether to visit Oceanside or not, while
  - Those stopping at the CWC Oceanside are already in the area and appear to be seeking and open to decisions about where to go and what to see in the immediate area and in the region.

# Influence of CWC/VO Materials and Services

**(q5A) How influential was the information you received in (changing your plans for) visiting Oceanside?**

	Total	Survey Type		Residence		
		On- site	Inter- net	CA	Other US	Int'l
<b>Valid Base: Visited/Stopped by Oceanside</b>	<b>416</b>	<b>191</b>	<b>225</b>	<b>108</b>	<b>253</b>	<b>55</b>
Extremely influential	24.3%	28.3%	20.9%	27.8%	22.9%	23.6%
Very much influential	35.1%	29.3%-	40.0%+	29.6%	37.5%	34.5%
Somewhat influential	20.7%	16.2%	24.4%	18.5%	20.9%	23.6%
Slightly influential	4.3%	2.6%	5.8%	5.6%	4.0%	3.6%
Little/not at all influential	6.7%	4.2%	8.9%+	6.5%	7.5%	3.6%
DK/ No response	8.9%	19.4%+	0.0%-	12.0%	7.1%	10.9%
<b>Mean rating (5=Extr. infl., 1=Little/no infl.):</b>	<b>3.72</b>	<b>3.93+</b>	<b>3.58-</b>	<b>3.76</b>	<b>3.69</b>	<b>3.80</b>

**(q10A) Did the information you received from Visit Oceanside influence you to change your plans for visiting Oceanside? (INTERNET ONLY)**

	Total	Residence		
		CA	Other US	Int'l
<b>Valid Base: Visited Oceanside</b>	<b>225</b>	<b>55</b>	<b>151</b>	<b>19</b>
No	67.6%	61.8%	70.2%	63.2%
Yes	24.0%	21.8%	23.8%	31.6%
DK/ Not sure	8.4%	16.4%	6.0%	5.3%

# How Information Influenced Oceanside Trip

- For those (whether internet or on-site visitors) whose plans for visiting Oceanside were influenced by the CWC or Visit Oceanside information,
  - The top change was to visit an Oceanside attraction they didn't plan on (52%), or to visit *additional* Oceanside attractions beyond those they had planned (43%)
  - While 31% simply decided to stay a few more hours in the City than they had originally planned,
  - And 17% added one or more nights in Oceanside due to the information received.
    - This rises to 33% of those influenced by mailed or web information, perhaps due to convenience of online lodging booking at home vs. in person in the CWC

# How Oceanside Trip was Influenced

**(q10B) Which of the following were you influenced to do in Oceanside based on the information you received from Visit Oceanside?**

	Total	Survey Type		Residence		
		On- site	Inter- net	CA	Other US	Int'l
<b>Valid Base: Influenced by CWC/VO</b>	<b>195</b>	<b>141</b>	<b>54</b>	<b>47</b>	<b>114</b>	<b>34</b>
To visit an Oceanside attraction(s) or site(s) not already planned	52.3%	52.5%	51.9%	59.6%	49.1%	52.9%
To visit additional Oceanside attractions and/or sites beyond those originally planned	42.1%	41.8%	42.6%	42.6%	43.0%	38.2%
To stay a few hours longer in Oceanside than planned	30.8%	27.7%	38.9%	25.5%	30.7%	38.2%
To stay overnight or add nights in Oceanside	16.9%	10.6%-	33.3%+	23.4%	15.8%	11.8%
Other change in your plans	4.1%	4.3%	3.7%	0.0%-	6.1%	2.9%

# Areas Visiting

- The top areas visited by those stopping by CWC Oceanside are the San Diego area (74%) followed by Oceanside (54% of visitor groups).
- These areas are reversed among Southern California travelers who requested Visit Oceanside travel information: 93% of them visited Oceanside specifically and 80% visited the rest of San Diego County.
  - This suggests that almost half of CWC walk-ins are mainly just stopping-- likely looking for more County-wide travel information and then heading elsewhere; whereas those requesting information from Visit Oceanside are more specifically focused on Oceanside itself.
  - The proportions of those on a SoCal trip who visit Oceanside are about the same as in FY2009, 59% of on-site visitors and 90% who received mailed information.
- Other destinations are much less named, led by Los Angeles/Hollywood (20%) and the Orange County coast (20%).



# Areas Visiting

**(q9A) Which of the California areas listed below did you stop and visit (not just pass through) on this trip, whether overnight or for any part of a day?**

	Total	Survey Type		Residence		
		On- site	Inter- net	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>111</b>	<b>268</b>	<b>56</b>
San Diego area (outside Oceanside)	77.2%	74.0%	79.8%	71.2%	77.2%	89.3%+
Oceanside	75.6%	53.6%-	93.0%+	73.9%	79.5%+	60.7%-
Los Angeles/Hollywood area	19.8%	19.3%	20.2%	8.1%-	19.0%	46.4%+
Orange County Coast areas (Newport Beach/Laguna Beach/Huntington Beach)	19.5%	21.4%	18.1%	12.6%-	19.4%	33.9%+
Disneyland/Anaheim area	14.9%	12.0%	17.3%	7.2%-	16.8%	21.4%
Long Beach/Santa Monica/Malibu areas	13.8%	13.5%	14.0%	3.6%-	13.4%	35.7%+
Palm Springs/Desert resorts area	9.7%	10.4%	9.1%	2.7%-	9.3%	25.0%+
Santa Barbara/Oxnard/Ventura area	7.4%	8.9%	6.2%	4.5%	6.3%	17.9%+
San Francisco Bay area/San Jose	6.4%	5.2%	7.4%	3.6%	5.2%	17.9%+
Riverside/San Bernardino/Inland Empire	5.5%	5.7%	5.3%	5.4%	4.5%	10.7%
Yosemite/Sequoia Parks/Gold Country	3.9%	5.2%	2.9%	2.7%	3.7%	7.1%
Monterey/Carmel/Santa Cruz area	3.7%	3.1%	4.1%	1.8%	3.4%	8.9%
San Luis Obispo/Central Coast area	3.4%	0.0%-	6.2%+	2.7%	2.6%	8.9%
Death Valley	3.0%	3.6%	2.5%	1.8%	1.5%-	12.5%+
Napa/Sonoma Wine Country	2.5%	2.6%	2.5%	0.0%-	3.4%	3.6%
Fresno/San Joaquin Valley/Central Valley	2.3%	3.1%	1.6%	2.7%	1.9%	3.6%
Eureka/North Coast area	1.6%	1.6%	1.6%	0.9%	1.9%	1.8%
Lake Tahoe area	1.6%	0.5%	2.5%	1.8%	1.5%	1.8%
Sacramento area	1.1%	0.5%	1.6%	2.7%	0.7%	0.0%-
Mammoth Lakes/Eastern Sierra	0.7%	0.5%	0.8%	1.8%	0.4%	0.0%-
Redding/Lake Shasta area	0.5%	0.0%	0.8%	0.0%	0.7%	0.0%
Mendocino other north coast areas	0.2%	0.0%	0.4%	0.0%	0.4%	0.0%
Others in California not on this list	17.5%	18.2%	16.9%	12.6%	18.7%	21.4%
Visiting areas outside California	9.0%	12.0%+	6.6%-	3.6%-	7.8%	25.0%+

# Regional Venues/Attractions

- In line with their greater interest in the greater San Diego region, walk-in CWC guests plan to visit downtown San Diego (48%) and the San Diego Zoo (37%) more frequently than those receiving Visit Oceanside information, who are much more likely to visit the Coastal Beaches (74%).
  - This is only a relative difference, as CWC guests still visit the Coastal Beaches more (53%) than any other single attraction.

# Regional Venues/Attractions

**(q9B) Which of the following Southern California regional attractions or areas did you visit?**

	Total	Survey Type		Residence		
		On- site	Inter- net	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>111</b>	<b>268</b>	<b>56</b>
Coastal Beaches	64.6%	53.1%-	73.7%+	58.6%-	66.0%	69.6%
Downtown San Diego	44.8%	48.4%	42.0%	33.3%-	46.6%	58.9%+
San Diego Zoo	29.7%	37.0%+	23.9%-	19.8%-	31.7%	39.3%
SeaWorld San Diego	22.1%	26.0%	18.9%	15.3%-	22.0%	35.7%+
Disneyland/California Adventure	13.8%	12.5%	14.8%	11.7%	13.8%	17.9%
LEGOLAND	13.6%	13.5%	13.6%	15.3%	12.7%	14.3%
San Diego Safari Park	13.3%	16.1%	11.1%	15.3%	12.3%	14.3%
Others not listed	26.9%	20.3%-	32.1%+	19.8%-	29.9%+	26.8%
None/No Southern California regional attractions	9.4%	11.5%	7.8%	18.9%+	7.1%-	1.8%-

# Oceanside Venues/Attractions

- For those visiting Oceanside itself, the beaches (88%), the Pier (74%), and the Harbor Village (55%) are the most popular attractions, especially among those requesting travel information before they came.
  - These are the same top 3 Oceanside attractions as in FY2009.

# Oceanside Venues/Attractions

**(q9C) Which of the following attractions did you visit in Oceanside?**

	Total	Survey Type		Residence		
		On- site	Inter- net	CA	Other US	Int'l
<b>Valid Base: Visited Oceanside</b>	<b>320</b>	<b>95</b>	<b>225</b>	<b>78</b>	<b>208</b>	<b>34</b>
Oceanside beaches	88.4%	82.1%-	91.1%+	85.9%	89.4%	88.2%
Oceanside Pier	74.4%	58.9%-	80.9%+	73.1%	75.5%	70.6%
Oceanside Harbor/Harbor Village	55.0%	41.1%-	60.9%+	60.3%	53.4%	52.9%
Sunset/Farmers' Market	35.0%	29.5%	37.3%	33.3%	35.6%	35.3%
Mission San Luis Rey	21.3%	23.2%	20.4%	19.2%	21.6%	23.5%
Camp Pendleton	20.0%	18.9%	20.4%	16.7%	23.1%+	8.8%-
California Surf Museum	13.4%	9.5%	15.1%	21.8%+	10.1%-	14.7%
Oceanside Museum of Art	6.3%	6.3%	6.2%	7.7%	5.3%	8.8%
Heritage Park	3.8%	2.1%	4.4%	1.3%	3.8%	8.8%
Buena Vista Lagoon/Audubon Society Nature Center	3.1%	4.2%	2.7%	3.8%	2.9%	2.9%
Others not listed	15.3%	9.5%-	17.8%+	19.2%	13.9%	14.7%
None/No Oceanside attractions	3.8%	11.6%+	0.4%-	6.4%	1.9%-	8.8%

# Overnight Stay in Oceanside

- The vast majority of respondents making a SoCal trip are staying overnight somewhere on their trip (91% of CWC walk-ins and 97% of those who had requested information from Visit Oceanside).
  - CWC overnight guests tend to be taking longer trips – about 14 nights – than those requesting travel information before their trip (about 9 nights)
- 75% of those making a SoCal trip after receiving Visit Oceanside information (and 43% of all people receiving information) elect to stay overnight in Oceanside, versus 34% of CWC visitors.
  - In FY2009 60% of those on a SoCal trip after receiving information (49% of all who received information) stayed, versus a 41% stay rate for CWC walk-ins.
- The CWC guests who stay in town tend to stay longer – 6.5 nights on average versus under 5 nights for those getting mail or web information.
- US visitors from out-of-state are most likely to stay in Oceanside (62%), and International visitors are least likely (43%), with in-state visitors in the middle at 51%.
  - While average length of stay is shortest for Californians (3.2 nights) and longest for foreign visitors (8.6 nights).

# Overnight Stay in Oceanside

## (q13A) Percent of respondents spending a night in these locations ...

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Minimum Base: Visited Oceanside/SoCal</b>	<b>434</b>	<b>192</b>	<b>242</b>	<b>246</b>	<b>82</b>	<b>106</b>	<b>110</b>	<b>268</b>	<b>56</b>
Overall	94.3%	90.6%-	97.1%+	100.0%+	81.7%-	90.6%	81.1%-	98.5%+	100.0%+
<b>IN the city of Oceanside</b>	<b>56.8%</b>	<b>33.9%-</b>	<b>74.9%+</b>	<b>100.0%+</b>	<b>0.0%-</b>	<b>0.0%-</b>	<b>51.4%</b>	<b>61.9%+</b>	<b>42.9%</b>
In the San Diego County area outside Oceanside	51.7%	54.2%	49.8%	40.9%-	64.6%+	67.0%+	50.5%	50.0%	62.5%
In California outside San Diego County	38.0%	49.0%+	29.3%-	30.1%-	36.6%	57.5%+	22.7%-	37.3%	71.4%+
In all other destinations/locations	25.3%	28.1%	23.1%	24.4%	18.3%	33.0%	10.9%-	24.6%	57.1%+

Mean number of nights at the location	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Minimum Base: Spent a night at the location</b>	<b>110</b>	<b>54</b>	<b>56</b>	<b>60</b>	<b>15</b>	<b>35</b>	<b>12</b>	<b>66</b>	<b>24</b>
Overall	10.01	14.33	8.85	10.03	9.22	12.78	5.23	9.25	24.30+
In all other destinations/locations	8.37	13.33	6.75	8.32	9.67	7.11	2.58-	5.68	17.22
In California outside San Diego County	5.75	6.50	5.00	5.05	8.03	6.08	6.76	5.22	8.98+
<b>IN the city of Oceanside</b>	<b>5.08</b>	<b>6.45</b>	<b>4.86</b>	<b>5.08</b>	*	*	<b>3.23-</b>	<b>5.40</b>	<b>8.63</b>
In the San Diego County area outside Oceanside	3.83	3.87	3.79	3.20-	4.85+	8.49	3.11	4.22	4.14

# Oceanside Lodging Type

- For those staying overnight in Oceanside, vacation rentals are the most common type of lodging across the board, accommodating about 45% of overnight groups.
  - Followed by hotels and motels (34%) and private homes (11%).
- Overnight guests receiving information from Visit Oceanside are relatively more likely to stay in a hotel/motel (38%), while CWC walk-in guests are relatively more likely to stay in a private home (14%) or an RV park (9%).
  - This is approximately the same lodging mix for those receiving travel information in FY2009, but represents a big shift away from hotel/motel stays for the on-site CWC guests: in FY2009, 55% stayed in hotels/motels and only 12% stayed in vacation rentals.
- International visitors are most likely to stay in a hotel/motel (46%), while US visitors are more likely to stay in vacation rentals and private homes.
  - And Californians are more likely to camp in RV parks.



# Oceanside Lodging Type

**(q13B) You said you stayed overnight in Oceanside; what type of lodging did you stay in?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Overnight in Oceanside</b>	<b>247</b>	<b>65</b>	<b>182</b>	<b>247</b>	*	*	<b>57</b>	<b>166</b>	<b>24</b>
Vacation rental/timeshare	44.5%	43.1%	45.1%	44.5%	*	*	43.9%	45.8%	37.5%
Hotel/Motel	34.4%	24.6%-	37.9%+	34.4%	*	*	33.3%	33.1%	45.8%
Private residence (unpaid lodging)	10.9%	13.8%	9.9%	10.9%	*	*	8.8%	12.7%	4.2%
RV Park/Campground	4.0%	9.2%+	2.2%	4.0%	*	*	7.0%	3.0%	4.2%
Military Base - paid lodging	2.4%	3.1%	2.2%	2.4%	*	*	3.5%	2.4%	0.0%-
Hostel	0.8%	3.1%	0.0%	0.8%	*	*	1.8%	0.0%	4.2%
Military Base - unpaid lodging	0.8%	1.5%	0.5%	0.8%	*	*	0.0%	1.2%	0.0%
Other	2.0%	1.5%	2.2%	2.0%	*	*	1.8%	1.8%	4.2%

# Requesting Information & Visiting Oceanside CWC

- There is a small overlap between the two contact groups in this profile
  - i.e. CWC walk-ins and people requesting information from VO
- Of the people who visited Oceanside after requesting VO information (93% of those making a trip to SoCal), 25% visit the CWC while there.

**(q11) Did you stop at the California Welcome Center (visitor center) in Oceanside?**

	Total	Oceanside Visit Status			Residence		
		Over-night	Day visit	No Visit	CA	Other US	Int'l
<b>Valid Base: Visited Oceanside</b>	<b>225</b>	<b>181</b>	<b>44</b>	<b>*</b>	<b>55</b>	<b>151</b>	<b>19</b>
No	72.0%	72.9%	68.2%	*	80.0%	72.8%	42.1%-
Yes	25.3%	24.3%	29.5%	*	18.2%	24.5%	52.6%+
DK/ Not sure	2.7%	2.8%	2.3%	*	1.8%	2.6%	5.3%

- Among CWC walk-in guests, 6% had previously requested VO information.
  - Thus, the vast majority of people in each contact group are distinct, which supports the value of providing information and marketing via both channels (CWC and VO).

**(q2A) Prior to arriving here today, had you contacted the CWC Oceanside and/or Visit Oceanside either by email, phone, or website to request travel information in the past 2 years?**

	Total	Oceanside Visit Status			Residence		
		Over-night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>192</b>	<b>65</b>	<b>38</b>	<b>89</b>	<b>53</b>	<b>103</b>	<b>36</b>
No	94.3%	87.7%-	94.7%	98.9%+	94.3%	93.2%	97.2%
Yes	5.7%	12.3%+	5.3%	1.1%-	5.7%	6.8%	2.8%

# Prior Awareness of Oceanside CWC

- Most CWC guests (71%) find out about it from highway signs on I-5
- And 13% learn about it while searching online for information about the Oceanside area
  - The percentage learning about the CWC online doubles to 26% among those who are staying overnight in Oceanside, emphasizing the importance of online information and marketing to lodging decisions.
- Although only 5% of the total and 11% of Californians reported learning about the CWC from past visits, 14% of the total and 26% of Californians have been to CWC Oceanside in the past 3 years (see slide 45).
  - This suggests that even for past CWC visitors, other means (highway signs, internet presence) are important for getting them to visit the CWC this time.
- Past CWC guests have visited an average of 3.6 times in the past 3 years, or a little over once a year.
  - Visit frequency largely depends on proximity: Repeat visitors from California have visited 5.4 times on average, while other repeat visitors have visited 1.5-1.6 times in a three-year period.

# Prior Awareness of Oceanside CWC

## (q2) How did you first learn about CWC Oceanside?

	Total	Oceanside Visit Status			Residence		
		Over-night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>192</b>	<b>65</b>	<b>38</b>	<b>89</b>	<b>53</b>	<b>103</b>	<b>36</b>
Saw sign on a main highway	70.8%	50.8%-	78.9%	82.0%+	71.7%	68.0%	77.8%
When searching on the Internet for Oceanside area information	12.5%	26.2%+	2.6%-	6.7%-	9.4%	12.6%	16.7%
Was recommended by a friend, relative or other person	5.7%	6.2%	10.5%	3.4%	3.8%	8.7%	0.0%-
Saw it while walking/biking in the area	5.2%	12.3%+	0.0%-	2.2%	9.4%	4.9%	0.0%-
Saw it in the California Tourism Visitors Guide or other state publication	5.2%	6.2%	2.6%	5.6%	1.9%	5.8%	8.3%
Just know about it/been here before	5.2%	0.0%-	7.9%	7.9%	11.3%	1.9%-	5.6%
Saw it on the California Tourism (visitcalifornia.com) or CWC (visitcwc.com) website	3.1%	4.6%	2.6%	2.2%	0.0%-	3.9%	5.6%
In materials I received from Visit Oceanside	2.6%	7.7%	0.0%-	0.0%-	0.0%-	2.9%	5.6%
Saw it on the San Diego County Visitors website	2.6%	3.1%	5.3%	1.1%	0.0%-	3.9%	2.8%
From another CWC already visited	2.6%	4.6%	0.0%-	2.2%	3.8%	1.9%	2.8%
Saw a magazine ad about it	1.0%	3.1%	0.0%	0.0%	1.9%	0.0%	2.8%
Live or work nearby	1.0%	1.5%	2.6%	0.0%	1.9%	1.0%	0.0%
Other	7.8%	10.8%	7.9%	5.6%	9.4%	8.7%	2.8%

# Prior Awareness of Oceanside CWC

**(q1A) Before today, have you visited this California Welcome Center (CWC) location in the past three (3) years?**

	Total	Oceanside Visit Status			Residence		
		Over-night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>192</b>	<b>65</b>	<b>38</b>	<b>89</b>	<b>53</b>	<b>103</b>	<b>36</b>
No	86.5%	92.3%	81.6%	84.3%	73.6%-	90.3%	94.4%+
Yes	13.5%	7.7%	18.4%	15.7%	26.4%+	9.7%	5.6%-

**(q1B) Before today, how many times in the past three (3) years have you visited this CWC Oceanside location?**

	Total	Oceanside Visit Status			Residence		
		Over-night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited CWC before</b>	<b>26</b>	<b>5</b>	<b>7</b>	<b>14</b>	<b>14</b>	<b>10</b>	<b>2</b>
1 time	42.3%	40.0%	57.1%	35.7%	28.6%	60.0%	50.0%
2-3 times	30.8%	40.0%	14.3%	35.7%	21.4%	40.0%	50.0%
4-6 times	7.7%	0.0%	14.3%	7.1%	14.3%	0.0%	0.0%
7-10 times	7.7%	0.0%	0.0%	14.3%	14.3%	0.0%	0.0%
11-15 times	11.5%	20.0%	14.3%	7.1%	21.4%+	0.0%-	0.0%-
<b>Mean:</b>	<b>3.62</b>	<b>3.80</b>	<b>3.29</b>	<b>3.57</b>	<b>5.36+</b>	<b>1.60-</b>	<b>1.50-</b>

# What Are Visitors Looking for at the CWC?

- Picking up travel information (maps, brochures, etc.) is the #1 reason people stop at the CWC (79%).
  - Especially for foreign tourists (92%)
- Information on specific Oceanside activities (42%) and specific regional or state activities (40%) are next-most important for drawing walk-ins to the CWC.
  - Information on these activities are particularly salient for overnight guests
- Using the Center's restrooms is the 4<sup>th</sup>-most common reason for stopping by (35%)
  - Over half (53%) of those making a quick stop say they are looking for restrooms, which makes sense because they are on the road to somewhere else, and particularly for south-bound travelers, the CWC has the first public restrooms in many miles.
    - A quick stop is defined as stopping by the CWC Oceanside, but not visiting Oceanside itself.
  - But those making a quick stop are not only using the restroom – most (74%) also want to pick up travel maps and brochures.
- CWC guests generally find and use the information/services they are looking for (see slide after next).
  - Travel maps and brochures (88%), information on Oceanside activities (49%), restrooms (43%), and information on regional/state activities (32%) are also the top 4 categories used at the CWC.
- Travel maps and brochures, Oceanside-specific information, local coupons/ discounts, and lodging information are more frequently used by the CWC guests who previously requested Visit Oceanside information, as well as by Oceanside overnight guests in general.

# What Visitors Look for at the CWC

**(q3A) Please select the reason(s) you stopped at this CWC today?**

	Total	Oceanside Visit Status			Residence		
		Over-night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>192</b>	<b>65</b>	<b>38</b>	<b>89</b>	<b>53</b>	<b>103</b>	<b>36</b>
Area maps, brochures, publications	78.6%	80.0%	81.6%	76.4%	69.8%-	78.6%	91.7%+
Information on Oceanside specific activities/things to do/directions	42.2%	61.5%+	39.5%	29.2%-	41.5%	42.7%	41.7%
Information on regional or state activities/things to do/directions	40.1%	50.8%+	36.8%	33.7%	28.3%-	43.7%	47.2%
Rest rooms	34.9%	16.9%-	23.7%	52.8%+	47.2%+	27.2%-	38.9%
Coupons or discounts for area lodging, restaurants, attractions	20.3%	29.2%	18.4%	14.6%-	20.8%	19.4%	22.2%
Gifts and souvenirs browse or purchase	17.7%	12.3%	18.4%	21.3%	17.0%	20.4%	11.1%
Theme park/attraction tickets	12.5%	15.4%	5.3%-	13.5%	13.2%	10.7%	16.7%
Lodging information/reservation services	7.3%	16.9%+	2.6%	2.2%-	7.5%	6.8%	8.3%
Internet service	1.0%	0.0%	0.0%	2.2%	0.0%	1.0%	2.8%
Other information or purpose	5.7%	3.1%	5.3%	7.9%	13.2%+	3.9%	0.0%-

# What Visitors Actually Find at the CWC

**(q12C) Which of the following information or services did you actually use, obtain or purchase while at the CWC visitor center?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Valid Base: Visited Oceanside CWC</b>	<b>239</b>	<b>192</b>	<b>47</b>	<b>103</b>	<b>47</b>	<b>89</b>	<b>61</b>	<b>134</b>	<b>44</b>
Area maps, brochures, publications	87.9%	85.4%-	97.9%+	93.2%+	87.2%	82.0%-	77.0%-	88.8%	100.0%+
Information on Oceanside specific activities/things to do/directions	49.0%	43.8%-	70.2%+	65.0%+	44.7%	32.6%-	47.5%	49.3%	50.0%
Rest rooms	43.1%	44.8%	36.2%	27.2%-	40.4%	62.9%+	50.8%	38.1%	47.7%
Information on regional or state activities/things to do/directions	31.8%	33.9%	23.4%	28.2%	36.2%	33.7%	26.2%	29.1%	47.7%+
Gifts and souvenirs	23.4%	21.4%	31.9%	23.3%	17.0%	27.0%	24.6%	26.1%	13.6%
Coupons or discounts for area lodging, restaurants, attractions	21.8%	17.2%-	40.4%+	28.2%+	21.3%	14.6%-	18.0%	23.1%	22.7%
Theme park/attraction tickets	13.4%	13.0%	14.9%	16.5%	8.5%	12.4%	8.2%	14.2%	18.2%
Lodging information/reservation services	10.0%	7.8%	19.1%	18.4%+	4.3%	3.4%-	4.9%	11.2%	13.6%
Internet service	5.9%	6.3%	4.3%	7.8%	0.0%-	6.7%	4.9%	5.2%	9.1%
Other information or service	4.6%	4.7%	4.3%	4.9%	4.3%	4.5%	4.9%	5.2%	2.3%
None of the above	0.4%	0.5%	0.0%	0.0%	2.1%	0.0%	0.0%	0.7%	0.0%



# What Visitors Can't Find at the CWC

- 74% of CWC walk-in guests found what they wanted in terms of the selection of information and services available.
  - This represents an decrease from FY2009, when a full 98% of guests found what they were looking for.
- 10% were looking for maps and brochures they couldn't find
- About 5-6% each of walk-in guests indicated they were unable to find:
  - Information on specific Oceanside activities
  - Gifts and souvenirs
  - Information on specific regional/state activities
  - Local coupons and discounts
- Notably, fewer who came to the CWC after requesting information from VO were satisfied with the CWC offerings (53%),
  - Suggesting that they may be seeking additional, different information once in the area (i.e. at the CWC) that they didn't already receive through the mail/web from VO.

# What Visitors Can't Find at the CWC

**(q12D) Which of the following information or services did you want to use/obtain/buy at this California Welcome Center (CWC), but couldn't find there?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Valid Base: Visited Oceanside CWC</b>	<b>239</b>	<b>192</b>	<b>47</b>	<b>103</b>	<b>47</b>	<b>89</b>	<b>61</b>	<b>134</b>	<b>44</b>
Area maps, brochures, publications	9.6%	6.8%-	21.3%+	11.7%	10.6%	6.7%	8.2%	11.2%	6.8%
Information on Oceanside specific activities/things to do/directions	5.9%	3.1%-	17.0%+	6.8%	12.8%	1.1%-	9.8%	6.0%	0.0%-
Gifts and souvenirs	5.4%	4.2%	10.6%	5.8%	8.5%	3.4%	9.8%	5.2%	0.0%-
Information on regional or state activities/things to do/directions	5.0%	4.7%	6.4%	3.9%	6.4%	5.6%	4.9%	6.0%	2.3%
Coupons or discounts for area lodging, restaurants, attraction	5.0%	2.6%	14.9%+	6.8%	4.3%	3.4%	3.3%	6.7%	2.3%
Rest rooms	2.5%	1.6%	6.4%	1.9%	4.3%	2.2%	1.6%	3.7%	0.0%-
Lodging information/reservation services	1.7%	0.5%	6.4%	2.9%	2.1%	0.0%	0.0%	3.0%	0.0%
Theme park/attraction tickets	1.7%	1.0%	4.3%	1.9%	2.1%	1.1%	3.3%	1.5%	0.0%
Internet service	0.4%	0.5%	0.0%	1.0%	0.0%	0.0%	1.6%	0.0%	0.0%
Other information or service	5.0%	4.7%	6.4%	5.8%	6.4%	3.4%	4.9%	4.5%	6.8%
Don't recall	3.3%	0.0%-	17.0%+	7.8%+	0.0%-	0.0%-	1.6%	3.0%	6.8%
None of the above/found everything I wanted	73.6%	78.6%+	53.2%-	68.9%	72.3%	79.8%	72.1%	73.9%	75.0%

# Rating Oceanside CWC Services/Amenities

- Overall, CWC guests were pleased with just about every aspect of the services and amenities:
  - Over 95% of CWC visitors were satisfied (rated as “Good” or “Excellent”) with the Center’s staff service, displays, and the overall usefulness of the information.
  - And over 90% were satisfied with the parking, the restrooms, ease of access, and the internet service provided.
- The only area for potential improvement is the selection of gifts and souvenirs— only 81% of CWC visitors were satisfied with these.
- The average ratings given for each of these services and amenities are shown on the slide after next.
  - Staff assistance received the highest rating at 4.9 out of 5
  - Helpfulness of the information, the restrooms, and the exhibits/displays were next-highest rated overall at 4.7 out of 5.
  - Although these ratings are comparable to the ratings in FY2009, the ratings for ease of access, internet service, and selection of gifts/souvenirs are somewhat lower now than in the previous study.

# Rating Oceanside CWC Services/Amenities (% Giving Top 2 Scores)

**(q12E) Based on your visit, please rate each of the facilities, services, and features listed below for this California Welcome Center using the 5-point scale below (from 5=Excellent to 1=Poor)?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
Percent saying 'Excellent/Good'									
<b>Minimum Base: Used service</b>	<b>124</b>	<b>106</b>	<b>18</b>	<b>48</b>	<b>23</b>	<b>53</b>	<b>34</b>	<b>64</b>	<b>26</b>
Staff assistance	99.6%	100.0%	97.9%	99.0%	100.0%	100.0%	100.0%	99.3%	100.0%
Exhibits, displays, maps	97.4%	97.3%	97.9%	99.0%	97.9%	95.3%	96.6%	97.7%	97.7%
Helpfulness of literature/information	97.4%	96.8%-	100.0%+	98.0%	100.0%+	95.3%	96.5%	97.7%	97.7%
Parking	94.4%	95.7%	89.1%	94.9%	91.5%	95.4%	93.2%	93.8%	97.7%
Restrooms (at or near center)	94.3%	95.7%	88.6%	90.8%	97.1%	96.1%	97.9%	91.5%-	97.0%
Ease of access from highway	93.5%	95.7%	84.8%	90.9%	95.7%	95.4%	90.0%	93.8%	97.7%
On-site Internet service	91.9%	91.5%	94.4%	95.8%	95.7%	86.8%	88.2%	93.8%	92.3%
Gift and souvenir selection	80.5%	82.7%	71.4%	77.8%	77.4%	84.5%	76.1%	80.2%	88.9%

# Rating Oceanside CWC Services/Amenities (Average Score)

**(q12E) Based on your visit, please rate each of the facilities, services, and features listed below for this California Welcome Center using the 5-point scale below (from 5=Excellent to 1=Poor)?**

Mean rating where 5=Excellent and 1=Poor	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Minimum Base: Used service</b>	<b>124</b>	<b>106</b>	<b>18</b>	<b>48</b>	<b>23</b>	<b>53</b>	<b>34</b>	<b>64</b>	<b>26</b>
Staff assistance	4.91	4.93	4.81	4.88	4.89	4.94	4.87	4.93	4.91
Helpfulness of literature/information	4.72	4.74	4.64	4.74	4.72	4.71	4.75	4.73	4.66
Restrooms (at or near center)	4.72	4.76+	4.54-	4.65	4.82	4.74	4.81	4.69	4.67
Exhibits, displays, maps	4.71	4.73	4.62	4.71	4.81+	4.66	4.78	4.67	4.75
Parking	4.67	4.69	4.57	4.70	4.66	4.63	4.68	4.62	4.77
Ease of access from highway	4.59	4.68+	4.24-	4.48-	4.70	4.67	4.52	4.58	4.74+
On-site Internet service	4.55	4.58	4.33	4.58	4.70	4.45	4.41	4.58	4.65
Gift and souvenir selection	4.17	4.25	3.86-	4.11	4.32	4.17	4.24	4.13	4.22

# Importance of Location in Oceanside

- CWC walk-in guests think that it is important for the CWC to be located *in* Oceanside.
  - 71% rated it ‘Somewhat important’ or ‘Extremely important’, with an average rating of ‘Somewhat important’ (4.0 out of 5.0) overall.

**(q12A) How important was it to you that this California Welcome Center (CWC) is located specifically in Oceanside?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Valid Base: Visited Oceanside/SoCal</b>	<b>249</b>	<b>192</b>	<b>57</b>	<b>109</b>	<b>51</b>	<b>89</b>	<b>63</b>	<b>140</b>	<b>46</b>
Extremely important	41.4%	41.1%	42.1%	56.0%+	35.3%	27.0%-	39.7%	40.0%	47.8%
Somewhat important	29.3%	26.0%	40.4%	27.5%	37.3%	27.0%	28.6%	31.4%	23.9%
Neutral in importance	22.5%	25.0%	14.0%	15.6%-	23.5%	30.3%+	23.8%	20.7%	26.1%
Somewhat unimportant	1.6%	1.0%	3.5%	0.9%	2.0%	2.2%	0.0%-	2.9%+	0.0%-
Little or no importance	5.2%	6.8%+	0.0%-	0.0%-	2.0%	13.5%+	7.9%	5.0%	2.2%
<b>Mean rating (5=Extr. imp., 1=Little/no imp.):</b>	<b>4.00</b>	<b>3.94</b>	<b>4.21</b>	<b>4.39+</b>	<b>4.02</b>	<b>3.52-</b>	<b>3.92</b>	<b>3.99</b>	<b>4.15</b>

# Trip Planning Resources

- The top planning resource used by visitors before making a trip to SoCal was the Visit Oceanside website (51%),
  - Followed by visitor guides (26%), auto clubs (23%), general travel websites (23%), the San Diego Visitors Center (21%), and CWC Oceanside (21%).
- Not surprisingly, those requesting information from Visit Oceanside were especially likely to have consulted the VO website (80%) or the CWC (30%), as these are the main channels for these requests, while they also used the San Diego Visitors Center, California tourism/CWC sites, and lodging sources to plan their trip.
  - Conversely, CWC walk-ins were more likely to travel without any preplanning (22%), or to use mobile apps (13%).
- During their trip (see slide after next), SoCal visitors used visitor guides most often (37%), followed by information from the CWC Oceanside (32%).
  - While the Visit Oceanside website fell to third in importance (30%).

# Trip Planning Resources

**(q8A) While PLANNING before this trip, which of the following sources did you use for travel information?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>247</b>	<b>82</b>	<b>106</b>	<b>111</b>	<b>268</b>	<b>56</b>
Visit Oceanside website	50.8%	13.5%-	80.2%+	73.3%+	41.5%-	5.7%-	53.2%	52.2%	39.3%
Visitor/travel guides or brochures	26.4%	24.0%	28.4%	24.3%	26.8%	31.1%	19.8%-	26.5%	39.3%+
AAA or other Auto Club	23.0%	20.3%	25.1%	23.1%	26.8%	19.8%	27.0%	23.1%	14.3%-
Other travel website	22.5%	25.0%	20.6%	19.0%	19.5%	33.0%+	15.3%-	25.4%	23.2%
San Diego Visitors Bureau	21.1%	10.4%-	29.6%+	21.5%	26.8%	16.0%	14.4%-	23.5%	23.2%
California Welcome Center (CWC) Oceanside	20.5%	8.3%-	30.0%+	23.5%	26.8%	8.5%-	31.5%+	16.4%-	17.9%
California Tourism or CWC website	14.3%	7.8%-	19.3%+	13.8%	18.3%	12.3%	6.3%-	16.4%	19.6%
A Hotel or other lodging source	11.5%	6.8%-	15.2%+	13.0%	11.0%	8.5%	5.4%-	15.3%+	5.4%
Mobile apps	7.6%	12.5%+	3.7%-	5.7%	6.1%	13.2%	6.3%	9.0%	3.6%-
Social media (Facebook, Twitter, etc.)	7.1%	5.2%	8.6%	6.5%	13.4%	3.8%-	15.3%+	3.7%-	7.1%
Consumer/travel magazines	3.2%	2.6%	3.7%	4.9%+	1.2%	0.9%-	1.8%	3.4%	5.4%
Travel agent/tour operator	3.0%	2.6%	3.3%	2.4%	2.4%	4.7%	0.9%-	2.6%	8.9%
Hometown newspaper	1.4%	1.0%	1.6%	0.8%	3.7%	0.9%	4.5%	0.4%	0.0%-
TV/radio	0.9%	1.6%	0.4%	0.4%	1.2%	1.9%	0.9%	0.7%	1.8%
Other sources	13.1%	15.6%	11.1%	10.5%	19.5%	14.2%	16.2%	12.3%	10.7%
No sources used/ Didn't do any pre-planning	11.0%	21.9%+	2.5%-	5.7%-	12.2%	22.6%+	10.8%	10.1%	16.1%



# Resources Used in Local Area

**(q8B) DURING this trip, which of the following sources did you use for travel information?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>247</b>	<b>82</b>	<b>106</b>	<b>111</b>	<b>268</b>	<b>56</b>
Visitor travel guides/brochures	37.0%	42.2%+	32.9%-	36.0%	32.9%	42.5%	27.9%-	37.7%	51.8%+
California Welcome Center (CWC) Oceanside	31.7%	42.7%+	23.0%-	29.1%	42.7%+	29.2%	33.3%	28.7%	42.9%
Visit Oceanside website	30.1%	12.0%-	44.4%+	40.9%+	28.0%	6.6%-	34.2%	28.7%	28.6%
A hotel/concierge	15.9%	13.0%	18.1%	17.8%	14.6%	12.3%	12.6%	17.5%	14.3%
AAA or other Auto Club	14.7%	16.1%	13.6%	12.6%	20.7%	15.1%	20.7%+	12.7%	12.5%
Other travel website	14.3%	16.7%	12.3%	13.4%	11.0%	18.9%	9.9%	15.3%	17.9%
Mobile apps	13.3%	17.2%	10.3%	13.0%	14.6%	13.2%	15.3%	13.4%	8.9%
California Tourism or another CWC (center or website)	12.2%	8.9%-	14.8%+	11.7%	11.0%	14.2%	9.0%	10.8%	25.0%+
Local area newspaper	9.4%	4.7%-	13.2%+	10.9%	12.2%	3.8%-	10.8%	9.0%	8.9%
Social media (Facebook, Twitter, etc.)	5.7%	5.2%	6.2%	6.5%	6.1%	3.8%	8.1%	4.9%	5.4%
Consumer/travel magazines	3.7%	5.2%	2.5%	4.5%	0.0%-	4.7%	1.8%	3.0%	10.7%
TV/radio	2.3%	3.6%	1.2%	1.6%	3.7%	2.8%	1.8%	2.2%	3.6%
Other sources	10.1%	12.5%	8.2%	7.7%	15.9%	11.3%	10.8%	9.3%	12.5%
None/didn't use any during my trip	10.6%	9.4%	11.5%	8.5%	13.4%	13.2%	12.6%	11.2%	3.6%-

# Trip Purpose and Regional Transportation

- Most visitors who are taking a trip to SoCal are doing so as a vacation or pleasure trip (76%).
  - With 16% visiting friends and relatives and only 6% traveling for business.
    - Given that the Visit Oceanside and CWC Oceanside materials are geared toward tourists, it is not surprising that relatively few business travelers would be accessing them.
- Personal or rented vehicles (not RVs) are the dominant form of transportation for these SoCal visitors (93%).
  - As may be expected, Californians are more likely to be using a personal vehicle (84%), out-of-state US residents are in the middle (47% personal, 48% rented), and foreign visitors are more likely to use a rented vehicle (63%).

# Trip Purpose and Transportation Used

## (q6) What is the primary purpose of the trip you made?

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>247</b>	<b>82</b>	<b>106</b>	<b>111</b>	<b>268</b>	<b>56</b>
Pleasure or vacation	75.9%	75.5%	76.1%	78.5%	73.2%	71.7%	73.9%	75.0%	83.9%
Personal trip/Visiting friends or relatives	15.6%	13.0%	17.7%	16.2%	13.4%	16.0%	13.5%	17.9%	8.9%
Combined business and pleasure	3.9%	5.7%	2.5%	2.0%-	7.3%	5.7%	4.5%	3.7%	3.6%
Business/meeting	2.3%	3.6%	1.2%	1.2%	2.4%	4.7%	2.7%	2.2%	1.8%
Other purpose	2.3%	2.1%	2.5%	2.0%	3.7%	1.9%	5.4%+	1.1%	1.8%

## (q6A) What was your primary mode of ground transportation during this trip?

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>247</b>	<b>82</b>	<b>106</b>	<b>111</b>	<b>268</b>	<b>56</b>
Personal vehicle	54.5%	57.3%	52.3%	57.5%	51.2%	50.0%	83.8%+	47.0%-	32.1%-
Rental vehicle	38.2%	39.6%	37.0%	35.6%	40.2%	42.5%	2.7%-	47.8%+	62.5%+
Motor home/recreational vehicle	2.3%	1.0%	3.3%	2.4%	3.7%	0.9%	3.6%	1.5%	3.6%
Bicycle	0.7%	0.0%	1.2%	1.2%	0.0%	0.0%	1.8%	0.4%	0.0%
Motorcycle	0.2%	0.5%	0.0%	0.0%	0.0%	0.9%	0.9%	0.0%	0.0%
Other	4.1%	1.6%-	6.2%+	3.2%	4.9%	5.7%	7.2%	3.4%	1.8%

# Travel Group

- Out of the visitor groups (either CWC walk-ins or those requesting information from VO) taking a trip to Southern California, 41% are couples and another 35% include family.
  - Only 9% are people traveling on their own
- In FY2009, on-site visitors included more families (43%) and fewer couples (34%).

## (q17) Which best describes your travel group on this (overall) trip?

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>247</b>	<b>82</b>	<b>106</b>	<b>111</b>	<b>268</b>	<b>56</b>
A couple	41.4%	44.8%	38.7%	43.3%	37.8%	39.6%	39.6%	40.3%	50.0%
A family group	36.1%	30.2%-	40.7%+	35.6%	34.1%	38.7%	33.3%	39.6%+	25.0%
Alone	8.5%	13.0%+	4.9%-	5.3%-	15.9%+	10.4%	10.8%	8.2%	5.4%
A mixed group of family and friends	6.9%	5.2%	8.2%	8.5%	4.9%	4.7%	7.2%	6.0%	10.7%
A group of friends, co-workers, colleagues	4.6%	4.7%	4.5%	4.9%	3.7%	4.7%	7.2%	3.0%	7.1%
Military family or buddy	2.1%	1.6%	2.5%	2.0%	3.7%	0.9%	0.9%	3.0%	0.0%-
Other	0.5%	0.5%	0.4%	0.4%	0.0%	0.9%	0.9%	0.0%	1.8%

# Group Size and % Travelling with Children

- SoCal visitor groups average 2.8 people per group
  - Those who had requested information from VO as well as those staying overnight in Oceanside tended to have slightly larger groups (about 3.1) than other visitors.
    - This represents a slight increase in group size from 2.8 for those requesting information in FY2009
  - 28% of all visitor groups include children, or about 80% of the family groups, up from about 20% of visitor groups in FY2009.
  - Californians were the most likely to bring children (32%) and foreign visitors the least likely (18%).

**(q16A) Including yourself, how many people are in your immediate travel group today in the following age groups?**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Visited Oceanside/SoCal</b>	<b>435</b>	<b>192</b>	<b>243</b>	<b>247</b>	<b>82</b>	<b>106</b>	<b>111</b>	<b>268</b>	<b>56</b>
Total group size (avg. #)	2.76	2.36-	3.11+	3.06+	2.32-	2.46-	2.64	2.87	2.50
% with children <18	28.3%	22.9%	32.5%	29.6%	20.7%	31.1%	32.4%	28.7%	17.9%-

# Residence: U.S. and International

- Across the entire sample (including all those making a trip to SoCal as well as those who requested information from VO but did not end up traveling to SoCal), the majority are from other U.S. states (64%)
  - With 23% from other parts of California, and 13% from other countries.
- A relatively greater number of those requesting information from VO (vs. CWC walk-ins) are from other states, whereas fewer of them are from outside the U.S.
  - In FY2009, fewer foreign residents were walk-in visitors (9%), and more Californians were among those receiving information (32%).

## (q17A/C) Overall Residence

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>620</b>	<b>192</b>	<b>428</b>	<b>247</b>	<b>82</b>	<b>291</b>	<b>141</b>	<b>399</b>	<b>80</b>
California	22.7%	27.6%	20.6%	23.1%	30.5%+	20.3%	100.0%+	0.0%-	0.0%-
Other U.S. state	64.4%	53.6%-	69.2%+	67.2%	57.3%	63.9%	0.0%-	100.0%+	0.0%-
Another country	12.9%	18.8%+	10.3%-	9.7%-	12.2%	15.8%+	0.0%-	0.0%-	100.0%+

# State Residence

- As may be expected, more U.S. visitors are from California (26%) than any other single state.
- Other top domestic feeder markets are Arizona (12%), Colorado (5%), and Texas (5%).
- Arizonans are more likely to make the decision to visit Oceanside, and also more likely to stay overnight in Oceanside.

## (q18B) Which state do you live in?

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Lives in the US</b>	<b>540</b>	<b>156</b>	<b>384</b>	<b>223</b>	<b>72</b>	<b>245</b>	<b>141</b>	<b>399</b>	<b>*</b>
California	26.1%	34.0%+	22.9%-	25.6%	34.7%	24.1%	100.0%+	0.0%-	*
Arizona	12.2%	7.1%-	14.3%+	19.7%+	6.9%	6.9%-	0.0%-	16.5%+	*
Colorado	5.4%	5.1%	5.5%	6.3%	2.8%	5.3%	0.0%-	7.3%+	*
Texas	5.0%	5.1%	4.9%	3.1%	9.7%	5.3%	0.0%-	6.8%+	*
Nevada	3.9%	0.6%-	5.2%+	5.8%	1.4%	2.9%	0.0%-	5.3%+	*
Oregon	1.9%	3.2%	1.3%	1.8%	0.0%-	2.4%	0.0%-	2.5%+	*
Washington	1.7%	1.9%	1.6%	1.8%	1.4%	1.6%	0.0%-	2.3%+	*
Other U.S. state/territory	43.9%	42.9%	44.3%	35.9%-	43.1%	51.4%+	0.0%-	59.4%+	*

# California Residence

- Most (70%) California respondents were from Southern California, with 18% from Northern California and 12% from Central California
  - Southern Californians were the most likely to decide to visit Oceanside, especially for a day visit.

**(q18C) Which region of California?**

	Total	Survey Type		Oceanside Visit Status		
		On- site	Inter- net	Over- night	Day visit	No visit
<b>Full Base: Lives in California</b>	<b>141</b>	<b>53</b>	<b>88</b>	<b>57</b>	<b>25</b>	<b>59</b>
Southern Cal.	70.2%	71.7%	69.3%	73.7%	88.0%+	59.3%-
Northern Cal.	17.7%	18.9%	17.0%	15.8%	4.0%-	25.4%
Central Inland Cal.	7.1%	7.5%	6.8%	5.3%	4.0%	10.2%
Central Coast Cal.	5.0%	1.9%	6.8%	5.3%	4.0%	5.1%



# Foreign Residence

- Canada is the top foreign feeder market, with over half (56%) of international visitation, followed by Europe at 34%, with far fewer from the other markets named.

**(q18D) In which country/region do you live?**

	Total	Survey Type		Oceanside Visit Status		
		On- site	Inter- net	Over- night	Day visit	No visit
<b>Full Base: US visitor</b>	<b>80</b>	<b>36</b>	<b>44</b>	<b>24</b>	<b>10</b>	<b>46</b>
Canada	56.3%	44.4%	65.9%	62.5%	50.0%	54.3%
Europe	33.8%	47.2%+	22.7%-	29.2%	40.0%	34.8%
Asia/Pacific Islands	3.8%	2.8%	4.5%	0.0%	0.0%	6.5%
Mexico	1.3%	0.0%	2.3%	0.0%	0.0%	2.2%
Asia/Mainland	1.3%	0.0%	2.3%	0.0%	10.0%	0.0%
Pacific Islands	1.3%	0.0%	2.3%	4.2%	0.0%	0.0%
Other region/country	2.5%	5.6%	0.0%	4.2%	0.0%	2.2%

# Age

- Respondents' median age is 53, and 70% of respondents are 45 or older. This skews older than many other SoCal destinations (in the mid-to-upper 30's age range)
  - There are no real differences in age between those who get information from VO versus those walking into the CWC.
  - Average age has remained about the same since FY2009.

**(q19) Respondent's age**

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>620</b>	<b>192</b>	<b>428</b>	<b>247</b>	<b>82</b>	<b>291</b>	<b>141</b>	<b>399</b>	<b>80</b>
Under 18	1.1%	3.6%+	0.0%-	0.0%-	1.2%	2.1%+	1.4%	0.5%	3.8%
18-24	3.7%	9.4%+	1.2%-	3.6%	3.7%	3.8%	5.7%	2.8%	5.0%
25-34	8.1%	11.5%	6.5%	6.1%	9.8%	9.3%	11.3%	7.3%	6.3%
35-44	15.5%	10.9%	17.5%	13.8%	15.9%	16.8%	17.7%	15.5%	11.3%
45-54	23.7%	18.2%-	26.2%+	26.7%	20.7%	22.0%	17.7%-	25.6%	25.0%
55-64	27.7%	27.6%	27.8%	29.6%	31.7%	25.1%	29.8%	26.1%	32.5%
65+	18.9%	16.7%	19.9%	19.4%	15.9%	19.2%	15.6%	20.8%	15.0%
Decline to state	1.3%	2.1%	0.9%	0.8%	1.2%	1.7%	0.7%	1.5%	1.3%
<b>Median:</b>	<b>53.34</b>	<b>51.93</b>	<b>53.79</b>	<b>54.27</b>	<b>53.62</b>	<b>52.31</b>	<b>52.10</b>	<b>53.57</b>	<b>53.75</b>

# Household Income

- Median annual household income for all respondents is \$70,500.
  - Those who decide to visit Oceanside have higher incomes than those who decide against the trip: about \$75,700 vs. \$65,600
  - Oceanside visitors' incomes are comparable to California visitors overall<sup>1</sup>
  - Income for those receiving information dropped somewhat, from \$80,000 in 2009.

## (q20) What is your TOTAL expected 2012 household income before taxes? (In US dollars)

	Total	Survey Type		Oceanside Visit Status			Residence		
		On- site	Inter- net	Over- night	Day visit	No visit	CA	Other US	Int'l
<b>Full Base: Respondents</b>	<b>620</b>	<b>192</b>	<b>428</b>	<b>247</b>	<b>82</b>	<b>291</b>	<b>141</b>	<b>399</b>	<b>80</b>
Less than \$35,000	10.8%	12.5%	10.0%	10.1%	13.4%	10.7%	15.6%	9.5%	8.8%
\$35,000 - \$49,999	12.7%	12.5%	12.9%	10.9%	11.0%	14.8%	11.3%	13.0%	13.8%
\$50,000 - \$74,999	18.5%	14.1%-	20.6%+	17.4%	14.6%	20.6%	17.0%	20.1%	13.8%
\$75,000 - \$99,999	17.9%	15.1%	19.2%	20.2%	25.6%	13.7%-	21.3%	18.0%	11.3%
\$100,000 - \$199,999	13.4%	13.5%	13.3%	15.0%	9.8%	13.1%	10.6%	13.8%	16.3%
\$200,000 or more	4.2%	4.7%	4.0%	4.5%	4.9%	3.8%	6.4%	3.3%	5.0%
Decline to state	22.4%	27.6%	20.1%	21.9%	20.7%	23.4%	17.7%	22.3%	31.3%
<b>Median:</b>	<b>\$70,543</b>	<b>\$69,907</b>	<b>\$70,739</b>	<b>\$75,750</b>	<b>\$75,595</b>	<b>\$65,625</b>	<b>\$70,833</b>	<b>\$70,313</b>	<b>\$71,591</b>

<sup>1</sup>Source: Visit California, Domestic Travel Report, 2012.



# Appendix

Survey Methods  
and  
Calculation Basis

# Detailed Survey Methods

- 192 respondents were walk-in visitors to the CWC Oceanside, completing the on-site survey on an electronic tablet or a desktop computer, visiting between August 18 – December 29, 2012.
  - They were asked details about their trip to SoCal, their activities and spending in Oceanside (if any), their impression of the CWC, and demographics
- About 4,000 people who had contacted Visit Oceanside in 2011-2012 to receive a Visitors Guide or other travel information were sent email invitations in September 2012 and January 2013; of these, 428 completed the internet survey.
  - They were asked whether they made a trip to SoCal, details about that trip, their activities and spending in Oceanside (if any), their impression of the CWC (if they stopped by), and demographics

# Detailed Survey Methods

- All respondents were visitors to San Diego County.
- These two samples, totaling 620 respondents, are profiled together in the Visitor Profile section of the report.
- For the economic impact analyses in the first half of the report:
  - The on-site respondents' data was weighted to equal the total number of visitor groups visiting CWC Oceanside in 2012.
  - The internet respondents' data was weighted to equal the total number of Visitor Guides sent out to fulfill requests for travel information in 2012 (either mail, phone, or online requests).
  - An overlap factor was subtracted so that the overall totals would represent the total estimated volume and impact of visitors in contact with CWC/VO (either in person or by mail/phone/web) for CY 2012.

# Basis for Calculating Visitor Group Volume and VO/CWC Influence

- VO and CWC had contact with 112,582 total visitor groups in 2012
- Of these:
  - 91,845 groups were on-site, plus 20,737 groups who requested information from VO via internet/mail or a total of 112,582 groups
  - minus 4,026 groups estimated to overlap (got info from VO and visited the CWC) =
  - 108,556 unique visitor groups in contact with VO/CWC
- Of these net unique visitor groups:
  - 35,431 on-site groups were influenced to visit Oceanside
    - 23,161 were influenced *overnight* groups on-site
    - 12,270 were influenced *day visitor* groups on-site
  - 9,340 were influenced from VO web/mail info and visiting Oceanside
  - minus 3,475 estimated overlap =
  - 41,296 net influenced actual visitor groups
- Thus, of the 108,556 unique visitor groups in contact with VO/CWC, 41,296 both said they were influenced by VO/CWC materials and visited Oceanside, resulting in an influence rate of 38.0%.