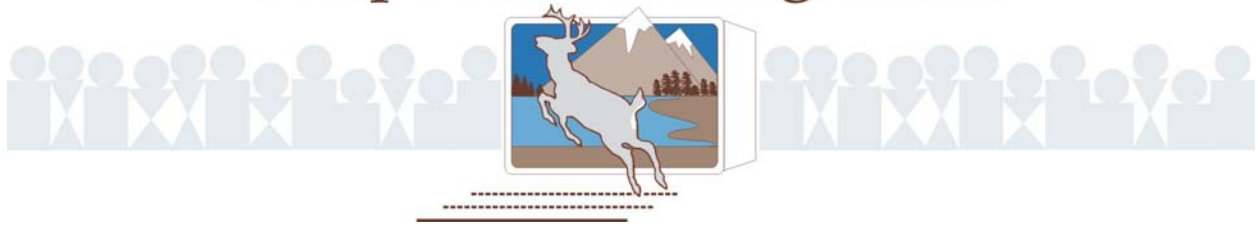


Responsive Management



CALIFORNIA TOURISM AND FISHING HERITAGE ASSESSMENT

**Conducted for the Alliance of Communities for Sustainable Fisheries
by Responsive Management**

2008

CALIFORNIA TOURISM AND FISHING HERITAGE ASSESSMENT

2008

Responsive Management National Office

Mark Damian Duda, Executive Director
Tom Beppler, Research Associate
Steven J. Bissell, Ph.D., Qualitative Research Associate
Andrea Criscione, Research Associate
Brad Hepler, Ph.D., Research Associate
James B. Herrick, Ph.D., Research Associate
Martin Jones, Senior Research Associate
Alison Lanier, Business Manager
Amanda Ritchie, Research Associate
Carol L. Schilli, Research Associate
Tim Winegord, Survey Center Manager

130 Franklin Street
Harrisonburg, VA 22801
Phone: 540/432-1888 Fax: 540/432-1892
E-mail: mark@responsivemanagement.com
www.responsivemanagement.com

Acknowledgements

Responsive Management would like to thank the following for their input, support, and guidance on this project:

Steve Scheiblaue, Monterey Harbormaster and member of the Alliance of Communities for Sustainable Fisheries; Carl Anderson, Monterey Director of Public Facilities; John McMahon and the Monterey County Convention and Visitors Bureau; Rick Algert, Morro Bay Harbor Director; John Sorgenfrei and the Morro Bay Community Promotions Committee; Ed Biaggini and the Morro Bay Business Forum; Richard Young, Crescent City Harbormaster; and Judy Baker and the Crescent City/Del Norte County Chamber of Commerce.

Responsive Management would also like to thank the local businesses, community leaders, tourism professionals, and area visitors who participated in the survey.

EXECUTIVE SUMMARY

INTRODUCTION AND METHODOLOGY

This report discusses the results of a study conducted for the Alliance of Communities for Sustainable Fisheries (hereinafter referred to as ACSF) to determine the opinions of visitors, tourism professionals, and community leaders on working waterfronts, community heritage, and recreational and commercial fishing in California's coastal communities, as well as visitors' consumption of seafood and the influence seafood plays in their choices of restaurants and tourist destinations. This study entailed a multi-modal survey of tourism professionals and community leaders in and visitors to the California coastal communities participating in the study: Crescent City, Monterey, and Morro Bay.

Responsive Management worked in partnership with the ACSF to design the survey instruments based on discussions with the ACSF, as well as on background research conducted by Responsive Management's research associates. For the first part of this assessment, a survey was administered to community tourism professionals and civic leaders in the three communities. For the second part of this assessment, a survey questionnaire (both via telephone and online) was administered to visitors to Crescent City, Monterey, and Morro Bay.

The samples of Crescent City and Monterey professionals and civic leaders were obtained from community officials and through additional online research by Responsive Management. Responsive Management obtained 33 completed surveys of professionals and civic leaders in the Crescent City area and 44 completed surveys of professionals and civic leaders in the Monterey Peninsula. For Morro Bay, the sample was obtained from community officials and through additional online research. Responsive Management obtained 66 completed surveys of professionals and civic leaders in the Morro Bay area.

For Crescent City, the Crescent City/Del Norte County Chamber of Commerce provided a sample of visitors. These Crescent City visitors were surveyed via telephone. Responsive Management obtained 71 completed surveys of visitors to Crescent City. For Monterey, the Monterey County Convention and Visitor's Bureau sent an online link through its newsletter to visitors. These visitors then completed the survey online. To encourage participation, an

incentive was offered to those who completed the survey. Responsive Management obtained 99 completed surveys of visitors to Monterey. For Morro Bay, the Morro Bay Community Promotions Committee sent visitors a link to the online survey. These visitors then completed the survey online. Responsive Management obtained 149 completed surveys of visitors to Morro Bay.

Telephone and online surveys with tourism professionals and civic leaders were conducted from November to December 2007. Telephone and online surveys with visitors were conducted from December 2007 to May 2008. Telephone surveys of professionals, civic leaders, and visitors were conducted and the data collected using Questionnaire Programming Language 4.1. For the online survey, data were collected using a Structured Query Language (SQL) database. The analysis of data was performed using Statistical Package for the Social Sciences (SPSS) software as well as proprietary software developed by Responsive Management.

TOURISM PROFESSIONALS AND CIVIC LEADERS SURVEY RESULTS

Community Identity

- Tourism professionals and civic leaders in the three communities were asked to rate the importance of three factors influencing their community's identity: local history, commercial fishing, and recreational fishing. For all communities, tourism professionals and civic leaders rated the three factors highly as having an important influence on their community's identity. Using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, the mean rating for local history's importance to community identity is 8.54, the mean rating for the importance of commercial fishing activities is 8.53, and the mean rating for the importance of recreational fishing activities is 8.44. This similarity in the rating of these factors highlights the relative importance of *all* three factors on establishing community identity in California's coastal communities.

Community Uniqueness

- In identifying the things that make their communities unique, 74% of all tourism professionals and civic leaders cite some form of recreational opportunities or tourist attractions, including fishing and the fishing heritage (39%), oceans, bays, and beaches

(32%), specific area landmarks and wildlife (26%), harbors and working waterfronts (20%), and lodging and dining opportunities (6%).

Factors Influencing a Community's Economy

- Tourism professionals and civic leaders were asked to rate the importance six factors influencing their community's economy, using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important; these factors to be rated were manufacturing, commercial fishing, recreational fishing, tourism, the availability of local seafood, and tourism generated by having the public be able to see a working waterfront. Tourism is the most important, having the highest mean rating (9.53) and having the highest percentage of professionals and civic leaders giving it a rating of 10 (73% rated it 10). Local seafood for purchase (mean rating 8.85, with 57% rating it 10) and tourism from having an active waterfront (mean rating of 8.82, with 50% rating it 10) are the next most important factors. These are followed by two factors grouped together with slightly lower ratings, relative to those just mentioned, although still well above the mid-point of the scale: commercial fishing (7.98 mean rating; 37% rating it 10) and recreational fishing (7.87 mean rating; 29% rating it 10). The lowest rated factor is manufacturing (5.38 mean rating; 13% rating it 10).
- Overall, 58% of tourism professionals and civic leaders indicate that the number of jobs *directly* created by fishing activities is of great importance to their community's economy (they rate it 8 or above on a scale of 0 to 10); 29% give a moderate rating (a rating of 3-7); and 3% indicate that the actual number of jobs *directly* created by fishing activities is of low importance to the community's economy (a rating of 0-2). Nearly identical results are found regarding the importance of the number of jobs *indirectly* created by fishing activities.
- Nearly two-thirds of all tourism professionals and civic leaders surveyed (63%) indicate that the fishing heritage of their community is of great importance in attracting business to their community (they rate it 8 or above); 31% rate its importance as moderate (a rating of 3-7); and only 3% indicate that fishing heritage is of low importance in attracting business to their community (a rating of 0-2).

- The majority of all tourism professionals and civic leaders surveyed (74%) indicate that having local, fresh seafood available is of great importance in attracting business to their community (a rating of 8 or above on a scale of 0 to 10); 25% rate its importance as moderate (a rating of 3-7); and only 2% indicate that having local, fresh seafood available is of low importance in attracting business to their community (a rating of 0-2).

Tourism and Business Information

- Tourism professionals and civic leaders appear to be well informed of various media promoting their local community. An overwhelming majority of tourism professionals and civic leaders (94%) are aware of brochures or websites that promote tourism and business in the Crescent City area, Monterey Peninsula, or Morro Bay area. Only 4% indicate that they are unaware of brochures or websites promoting tourism in their community.
 - Marketing and advertising directed toward visitors and potential business appears to feature the community's fishing heritage. When asked if the brochures or websites that they had seen feature photographs of fishing activities or fishing boats, 74% of all professionals and civic leaders indicate that they do; only 9% report that the brochures or websites do not feature photographs of fishing activities or fishing boats.
- The local Chamber of Commerce is most often identified as a source of information for California's coastal communities. Over half of tourism professionals and civic leaders (66%) list the Chamber of Commerce as the source sponsoring brochures and websites promoting tourism and business in their community. All other sources are identified by less than half of the respondents; these include government agencies, visitor's centers, local organizations, tourist attractions, and hospitality businesses.

Appreciation and Preservation of Cultural Identity by Local Governments

- Overall, 80% of tourism professionals and civic leaders believe that their community's government appreciates its cultural resources. Only 12% do not believe that their community's government appreciates its cultural resources.

- Likewise, 74% of tourism professionals and civic leaders believe that their community's government works to preserve its cultural identity; 20% do not believe that their community's government works to preserve cultural identity.

Organizational Information

- The vast majority of all tourism professionals and civic leaders surveyed (82%) belong to an organization that works to attract business to their local community.
- The distribution between tourism professionals and civic leaders in the survey was balanced to ensure representation of both business and community professionals: 49% of those interviewed in the professional survey were identified as community leaders, city officials, or community directors; the remaining respondents were categorized as restaurateurs, hoteliers, tourist attraction managers, visitor's bureau employees, and other miscellaneous.

VISITOR SURVEY RESULTS

Restaurant Visits in Crescent City, Monterey, and Morro Bay

- Overwhelming majorities of visitors to each of the three communities went to a restaurant while there: 87% of Crescent City visitors, 93% of Monterey visitors, and 92% of Morro Bay visitors. Additionally, a large majority of visitors to Crescent City (55%) ate seafood in a restaurant when visiting that community, and very large majorities of visitors to Monterey (81%) and Morro Bay (85%) ate seafood in a restaurant when visiting those communities.
 - The large majority of those who went to a restaurant in one of the three communities visited more than one restaurant in the community in the past 2 years, particularly Monterey and Morro Bay visitors: 74% of Crescent City visitors, 95% of Monterey visitors, and 93% of Morro Bay visitors went to more than one restaurant (among those who visited a restaurant).
- The survey asked about the importance that people had placed on being able to go to a good restaurant in their decision to visit Crescent City, Monterey, or Morro Bay. Overwhelming majorities of visitors to the communities said that being able to go to a good restaurant was important—with most of those responses being *very* important—in their decision to visit

those communities: 75% of Crescent City visitors, 92% of Monterey visitors, and 91% of Morro Bay visitors.

- Very large majorities of visitors to the three communities agree that, in general, they sometimes seek out restaurants specifically for seafood: 75% of Crescent City visitors, 80% of Monterey visitors, and 77% of Morro Bay visitors. When asked about seeking restaurants *in Crescent City, Monterey, or Morro Bay* (as opposed to any location in general) for seafood, lower percentages, but still majorities in Monterey and Morro Bay, agree that they seek out restaurants in the respective community for seafood: 48% of Crescent City visitors, 74% of Monterey visitors, and 79% of Morro Bay visitors.

- The survey asked about the importance respondents place on eight factors in deciding whether to go to a restaurant in the three communities. Four of the items relate specifically to types of food (seafood, steaks, vegetarian food, and ethnic food), and the four remaining items pertain to cost, the fishery itself, and the local fishing fleets. In general, respondents show great concern for the fishery and the local fishing fleet (knowing that the seafood is caught in a sustainable way; knowing that the seafood is caught by local fishermen), they show great concern for being able to get fresh seafood, and they show moderate concern about cost. Of little importance is being able to get good steaks, vegetarian food, or ethnic food—in all cases, being able to get seafood is much more important than being able to get these other foods.

Overnight Visits to Crescent City, Monterey, and Morro Bay

- Large majorities of visitors to each community had stayed overnight in the respective community: 77% of Crescent City visitors, 81% of Monterey visitors, and 62% of Morro Bay visitors.
 - Most of those visitors to Monterey and Morro Bay who took an overnight trip to these communities took more than one trip: 70% of Monterey visitors and 78% of Morro Bay visitors. However, only 18% of Crescent City visitors who took an overnight trip took more than one trip.

Visiting the Waterfronts of Crescent City, Monterey, and Morro Bay

- Overwhelming majorities of visitors to the communities visited the waterfronts of those communities: 80% of Crescent City visitors, 93% of Monterey visitors, and 97% of Morro Bay visitors.
- The survey asked respondents how important in their decision to visit Crescent City, Monterey, or Morro Bay was being able to visit a working waterfront with a commercial fishing fleet. While visitors to Crescent City were evenly split (45% said it was important, and 45% said it was unimportant), visitors to Monterey and Morro Bay more often said it was important (46% of Monterey visitors; 62% of Morro Bay visitors) than unimportant (21% of Monterey visitors; 12% of Morro Bay visitors).

Motivations for Visiting Crescent City, Monterey, and Morro Bay

- The survey asked about the importance of seven factors when respondents had decided to visit Crescent City, Monterey, or Morro Bay, and the items were then ranked, with the results discussed below.
 - Crescent City visitors as a whole place much importance on four of the seven factors: being able to access the ocean (85% say this is *very* or *somewhat* important), being able to get to an isolated, uncrowded coastal area (80%), being able to access the beach (77%), and being able to go to a good restaurant (75%). Note that the top three relate to being out in nature rather than relating to human-cultural items. Of less importance to Crescent City visitors is being able to go wildlife viewing (62%), being able to visit a working waterfront with a commercial fishing fleet (45%), and being able to get fresh local seafood (41%).
 - Monterey visitors place much importance on five of the seven items: being able to go to a good restaurant (92%), being able to access the ocean (90%), being able to access the beach (85%), being able to get to an isolated, uncrowded coastal area (82%), and being able to go wildlife viewing (80%). Of less importance to Monterey visitors as a whole are being able to get fresh local seafood (62%) and being able to visit a working waterfront with a commercial fishing fleet (46%). Unlike Crescent City visitors, Monterey visitors place more emphasis on at least one human-cultural item: restaurants.

- Morro Bay visitors are more like Monterey visitors than Crescent City visitors. Morro Bay visitors place the most emphasis on the same five items (albeit in a slightly different order) that Monterey visitors do: being able to go to a good restaurant (91%), being able to get to an isolated, uncrowded coastal area (89%), being able to access the beach (88%), being able to access the ocean (87%), and being able to go wildlife viewing (79%). Of less importance to Morro Bay visitors as a whole are being able to get fresh local seafood (70%) and being able to visit a working waterfront with a commercial fishing fleet (62%). Again, unlike Crescent City visitors, Morro Bay visitors place more emphasis on at least one human-cultural item: restaurants.
- The survey asked respondents whether they agree or disagree with nine statements pertaining to tourism and visiting coastal communities, and then all nine statements were ranked. For each community, the top-ranked item is “A community’s culture, such as its identity as a fishing village, is worth preserving” (from 86% to 93% agree). Also in common among visitors to each of the communities is that low down on the ranking are “I often go on day trips to the coast” (39% of Crescent City visitors; 66% of Monterey visitors; and 64% of Morro Bay visitors) and “I would be more likely to go to a community that has a working waterfront with a commercial fishing fleet than to one that does not have a commercial fishing fleet” (56% of Crescent City visitors; 52% of Monterey visitors; and 64% of Morro Bay visitors).
- Among Crescent City visitors, the most agreement is for the statement, “A community’s culture, such as its identity as a fishing village, is worth preserving” (92% agree). Three more items are grouped, all with 75% agreeing: “Sometimes I seek out restaurants specifically for seafood,” “I enjoy seeing and visiting working waterfronts when I’m along the coast,” and “I would be more likely to go to a community where I could get fresh local seafood than to a coastal community where I could not get fresh local seafood.” At the bottom of the ranking among Crescent City visitors are “Sometimes I seek out restaurants specifically for seafood in Crescent City” (48% agree) and “I often go on day trips to the coast” (39%).
 - Among Monterey visitors, the top item is “A community’s culture, such as its identity as a fishing village, is worth preserving” (86% agree). After that, all items are fairly

uniform with no large gaps from one item to the next, all within the range of 80% to 66% in agreement, with the exception of the lowest ranked item at 52% agreement: “I would be more likely to go to a community that has a working waterfront with a commercial fishing fleet than to one that does not have a commercial fishing fleet.”

- Among Morro Bay visitors, two items are grouped at the top: “A community’s culture, such as its identity as a fishing village, is worth preserving” (93% agree) and “When I go to Morro Bay, I like seeing the fishing boats” (88%). After that, all items but two are closely grouped within the range of 81% to 77%. The bottom items are “I would be more likely to go to a community that has a working waterfront with a commercial fishing fleet than to one that does not have a commercial fishing fleet” (64% agree) and “I often go on day trips to the coast” (also 64%).
- Some notable differences occur from one community to the next.
 - Monterey and Morro Bay visitors are much more likely than are Crescent City visitors to agree with the statement, “I often go on day trips to the coast.”
 - Monterey and Morro Bay visitors are much more likely than are Crescent City visitors to agree with the statement, “Sometimes I seek out restaurants specifically for seafood in Crescent City/Monterey/Morro Bay” (note that the survey asked only about the one specific community the respondent had visited).
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing the fishing boats” (again, note that the survey asked only about the one specific community the respondent had visited).
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing waterfront activities, like fresh seafood being unloaded” (as with the above, the survey asked only about the one specific community the respondent had visited).
 - On all other statements, the percentages in agreement were about the same.

- The survey asked respondents who indicated that they often go on day trips to the coast for their motivations for going on day trips to the coast. Among visitors to each of the communities, enjoying the coastal scenery is an important reason for visiting the community. Also important are relaxing/getting away and seeing coastal wildlife. Of moderate importance are eating fresh seafood, being with family, and seeing a working waterfront.
- For some visitors, fishing is a motivation for visiting Crescent City, Monterey, or Morro Bay (particularly Morro Bay): 7% of visitors to Crescent City fished near there, 10% of visitors to Monterey fished near there, and 26% of visitors to Morro Bay fished near there.

Consumption of Seafood

- The survey asked a series of questions (asking whether respondents agreed or disagreed with eight statements) about seafood consumption, and the results were ranked. Except for one statement among Crescent City visitors, majorities agree with all the statements (the exception being “Sometimes I seek out restaurants specifically for seafood in Crescent City,” with which 48% of Crescent City visitors agreed). Furthermore, in general, there was not much difference between the top-ranked statement and the lowest-ranked statement. For example, among Monterey visitors, agreement ranged only from 69% to 81%, and among Morro Bay visitors, agreement ranged from 72% to 89%. The top-ranked statement for all three communities is “It is important that seafood is not harvested in a way that endangers the fishery itself” (from 81% to 89% agree).
 - Among Crescent City visitors, three statements have notably lower percentages in agreement than the rest: “When I go to Crescent City, I like seeing the fishing boats” (66% agree), “When I go to Crescent City, I like seeing waterfront activities, like fresh seafood being unloaded” (58%), and “Sometimes I seek out restaurants specifically for seafood in Crescent City” (48%, and as previously mentioned, the only statement with less than a majority in agreement).
 - Among Monterey visitors, all statements have at least 69% who agree.
 - Among Morro Bay visitors, all statements have at least 72% who agree.

- The notable differences among the communities are discussed below.
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing the fishing boats” (note that the survey asked only about the one specific community the respondent had visited).
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing waterfront activities, like fresh seafood being unloaded” (as with the above, the survey asked only about the one specific community the respondent had visited).
 - Monterey and Morro Bay visitors are much more likely than are Crescent City visitors to agree with the statement, “Sometimes I seek out restaurants specifically for seafood in Crescent City/Monterey/Morro Bay” (again, the survey asked only about the one specific community the respondent had visited).
 - As discussed in the Introduction and Methodology section, some of these results were previously discussed in another section of this report because they also pertain to that section.

- A large majority of visitors to Crescent City (55%) ate seafood in a restaurant when visiting that community, and very large majorities of visitors to Monterey (81%) and Morro Bay (85%) ate seafood in a restaurant when visiting those communities.
 - When asked in follow-up whether the seafood they ate in a restaurant was locally caught, about half of those respondents indicated that it was locally caught: 46% of Crescent City visitors who ate seafood in a restaurant, 48% of Monterey visitors who ate seafood in a restaurant, and 47% of Morro Bay visitors who ate seafood in a restaurant. (Note that majorities did not know.)

-
- Small, but not insubstantial, percentages of visitors to the three communities ate seafood purchased from a market or other non-restaurant place: 8% of Crescent City visitors, 14% of Monterey visitors, and 26% of Morro Bay visitors.
 - When asked in follow-up whether the seafood they ate from a market or other non-restaurant place was locally caught, at least half of those respondents indicated that it was locally caught: 50% of Crescent City visitors who ate seafood from a market, 64% of Monterey visitors who ate seafood from a market, and 58% of Morro Bay visitors who ate seafood from a market. (Note that most of the remainder did not know.)

 - Within the series of questions regarding the importance of factors in respondents' decisions to visit one of the three communities was a question specifically about the importance of being able to get fresh local seafood, and it is worth examining this question individually. Being able to get fresh local seafood had been important to a majority of Monterey and Morro Bay visitors when they had decided to go to those places (61% and 71%, respectively), and in these communities, "important" responses far exceeded "unimportant" responses (16% and 8%, respectively, said that being able to get fresh local seafood had been unimportant in their decision to go to Monterey or Morro Bay). Crescent City visitors were split, with 41% who said that being able to get fresh local seafood had been important, and 43% who said it had been unimportant.

 - Within the series of questions regarding the importance of factors in respondents' decisions whether to visit a restaurant in one of these coastal communities was a question about the importance of being able to get fresh local seafood in that restaurant. For each community, those who say being able to get fresh local seafood is important (72% of Crescent City visitors, 74% of Monterey visitors, and 79% of Morro Bay visitors) far exceed those who say this is unimportant (21% of Crescent City visitors, 8% of Monterey visitors, and 6% of Morro Bay visitors).

 - The survey asked respondents if they had ever compared the costs of local versus non-local seafood: for each community, the percentage who had *not* compared costs of seafood exceeded the percentage who had done so (although among Monterey visitors, the difference

in “Yes” and “No” answers is only 1 percentage point). Indeed, 27% of Crescent City visitors, 35% of Monterey visitors, and 32% of Morro Bay visitors had compared costs. Therefore, the broad conclusion is that costs of seafood are moderately important, but not greatly important.

- The survey then asked if respondents thought that local seafood was more expensive than, less expensive than, or about the same as non-local seafood. Generally, more people think local seafood is more expensive than think it is less expensive (note that in each community, the most common answer is, “Don’t know”). However, among those who think that local seafood is more expensive, most say that the more expensive price does *not* deter them from buying local seafood in these coastal communities. (Note that this study did not address whether local seafood *actually* is more or less expensive than non-local seafood; the question was asked of those who *think* local seafood is more expensive, whether this is true or not.)

Opinions on Commercial Fishing and Waterfront Industries

- The survey asked seven questions of Crescent City visitors and six questions of Monterey and Morro Bay visitors regarding the economy and the fishing/waterfront industries. In all communities, there is almost *no* agreement that working waterfronts are no longer important to the economies of coastal communities: only 8% of Crescent City visitors, 5% of Monterey visitors, and 2% of Morro Bay visitors agree with the statement. Also with relatively low agreement is the statement, “Addressing environmental problems is more important than addressing economic problems when setting commercial fishing regulations”: 65% of Crescent City visitors, 49% of Monterey visitors, and 46% of Morro Bay visitors agree. Otherwise, majorities agree with all other statements.
- Among Crescent City visitors, three statements have notably higher agreement than the rest: “A community’s culture, such as its identity as a fishing village, is worth preserving” (92% agree), “Policy makers should make sure that charter boat opportunities remain available to visitors to the coast” (86% agree), and “Policy makers should make sure that charter boat opportunities remain available to visitors to the coast so that those who don’t own a boat can go out on the water” (86% agree). Also of note is that slightly more agree that “Concerns about commercial fishermen’s livelihoods are

important when fishery managers and policy-makers set commercial fishing regulations” than agree that “Addressing environmental problems is more important than addressing economic problems when setting commercial fishing regulations.”

- Among Monterey and Morro Bay visitors, three statements have notably greater percentages in agreement than the others: “A community’s culture, such as its identity as a fishing village, is worth preserving,” “Concerns about commercial fishermen’s livelihoods are important when fishery managers and policy-makers set commercial fishing regulations,” and “Policy makers should make sure that charter boat opportunities remain available to visitors to the coast so that those who don’t own a boat can go out on the water.” Also of note is that much more in both communities agree that “Concerns about commercial fishermen’s livelihoods are important when fishery managers and policy-makers set commercial fishing regulations” than agree that “Addressing environmental problems is more important than addressing economic problems when setting commercial fishing regulations.”
- The survey asked respondents how important in their decision to visit Crescent City, Monterey, or Morro Bay had been being able to visit a working waterfront with a commercial fishing fleet. While visitors to Crescent City were evenly split (45% said it had been important, and 45% said it had been unimportant), visitors to Monterey and Morro Bay more often said it had been important (46% of Monterey visitors; 62% of Morro Bay visitors) than unimportant (21% of Monterey visitors; 12% of Morro Bay visitors).
- Within the series of questions about the importance of factors in decisions to visit restaurants in the three communities are two questions that are worth examining individually. Large majorities of visitors to Crescent City, Monterey, or Morro Bay think it is important when deciding to go to a restaurant to know that the seafood being served is fished in a way that does not endanger the fishery itself: 76% of Crescent City visitors, 79% of Monterey visitors, and 75% of Morro Bay visitors. Additionally, very large majorities think it is important to know that the seafood is caught by local fishermen: 80% of Crescent City visitors, 79% of Monterey visitors, and 81% of Morro Bay visitors.

- Knowledge of fishing methods and the waters from which the fish were caught is fairly low. Majorities of visitors to Crescent City (69%) and Morro Bay (61%) and just less than a majority of visitors to Monterey (48%) indicate that, when they last purchased seafood, they knew a little or nothing at all about the methods that were used to catch it. In another question regarding knowledge of seafood, less than a majority of visitors to each community knew from which waters their last seafood that they purchased was caught: 37% of Crescent City visitors, 40% of Monterey visitors, and 43% of Morro Bay visitors.

Opinions on Recreational Fishing

- In a basic question about recreational fishing, the survey found that 31% of Crescent City visitors, 28% of Monterey visitors, and 42% of Morro Bay visitors recreationally fish (although not necessarily at those locations). Regarding fishing near those locations, 7% of visitors to Crescent City fished near there, 10% of visitors to Monterey fished near there, and 26% of visitors to Morro Bay fished near there. Also, 20% of Crescent City visitors, 20% of Monterey visitors, and 36% of Morro Bay visitors fish in saltwater at least some of the time.
- Large majorities of respondents agree that charter boats are an inexpensive way for those who do not own a boat to be able to go out on the water: 79% of Crescent City visitors, 58% of Monterey visitors, and 67% of Morro Bay visitors.

TABLE OF CONTENTS

Introduction and Methodology	1
Survey Samples	2
Data Collection	3
Telephone Survey Facilities and Procedures	3
Online Survey Procedures	4
Data Analysis.....	4
A Note on Reading the Report	5
Tourism Professionals and Civic Leaders Survey Results	6
Community Identity.....	6
Community Uniqueness	15
Factors Influencing a Community’s Economy	18
Tourism and Business Information	42
Appreciation and Preservation of Cultural Identity by Local Governments	49
Organizational Information	54
Visitor Survey Results	58
Visitation to Crescent City, Monterey, and Morro Bay	58
Restaurant Visits in Crescent City, Monterey, and Morro Bay	58
Overnight Visits to Crescent City, Monterey, and Morro Bay	82
Visiting the Waterfronts of Crescent City, Monterey, and Morro Bay.....	86
Motivations for Visiting Crescent City, Monterey, and Morro Bay	89
Consumption of Seafood	120
Opinions on Commercial Fishing and Waterfront Industries.....	145
Opinions on Recreational Fishing	168
Demographic Data.....	175
About Responsive Management	186

INTRODUCTION AND METHODOLOGY

This report discusses the results of a study conducted for the Alliance of Communities for Sustainable Fisheries (hereinafter referred to as ACSF) to determine the opinions of visitors, tourism professionals, and civic leaders on working waterfronts, community heritage, and recreational and commercial fishing in California's coastal communities, as well as visitors' consumption of seafood and the influence seafood plays in their choices of restaurants and tourist destinations.

Responsive Management worked in partnership with the ACSF to design the survey instruments based on discussions with the ACSF, as well as on background research conducted by Responsive Management's research associates, who have extensive experience in needs assessments for natural resource, fish and wildlife, and outdoor recreation organizations. The study entailed multi-modal surveys administered via telephone and online to tourism professionals and civic leaders in and visitors to three California waterfront communities: Crescent City, Monterey, and Morro Bay.

For the first part of this assessment, a survey was administered to community tourism professionals and civic leaders in the three communities. For the purposes of the study, tourism professionals and civic leaders were broadly defined as people who are, in a professional or volunteer capacity, involved in the tourism industry and local community development. This includes members of tourism and visitor's bureaus, local economic and commerce organizations and associations, city officials and community leaders, and leaders in the community's hospitality industry including restaurateurs and hoteliers. The purpose of this survey was to determine the opinions of tourism professionals and civic leaders on the value of commercial and recreational fishing opportunities and working waterfronts for their community's identity and economy and to assess the degree to which tourism professionals and civic leaders will experience a sense of loss or, potentially, actual business income loss should these fishing and waterfront-related activities be lost.

For the second part of this assessment, a survey questionnaire (both via telephone and online) was administered to visitors to Crescent City, Monterey, and Morro Bay. The purpose of this

survey was to assess the factors that influence visitors' decisions to visit California's coastal communities, as well as their consumption of seafood and the influence seafood plays in their choices of restaurants and tourist destinations.

SURVEY SAMPLES

The samples of Crescent City and Monterey professionals and civic leaders were obtained from community officials and through additional online research by Responsive Management. Each professional in each sample was contacted through e-mail about the upcoming survey to encourage their subsequent participation. They were then contacted by telephone, and the survey was administered via telephone. Responsive Management obtained 33 completed surveys of professionals and civic leaders in the Crescent City area and 44 completed surveys of professionals and civic leaders in the Monterey Peninsula.

For Morro Bay, the sample was obtained from community officials and through additional online research. These people were contacted through e-mail about the upcoming survey to encourage their subsequent participation, and they were then surveyed via telephone. However, for Morro Bay, community officials provided a supplemental listing of professionals and civic leaders that included e-mail addresses only (no telephone numbers); these people were contacted via e-mail and then were surveyed online. Responsive Management obtained 66 completed surveys of professionals and civic leaders in the Morro Bay area.

For Crescent City, the Crescent City/Del Norte County Chamber of Commerce provided a sample of visitors. These Crescent City visitors were surveyed via telephone. Responsive Management obtained 71 completed surveys of visitors to Crescent City.

For Monterey, the Monterey County Convention and Visitor's Bureau sent an online link through its newsletter to visitors. These visitors then completed the survey online. To encourage participation, an incentive was offered to those who completed the survey. Responsive Management obtained 99 completed surveys of visitors to Monterey.

For Morro Bay, the Morro Bay Community Promotions Committee sent visitors a link to the online survey. These visitors then completed the survey online. Responsive Management obtained 149 completed surveys of visitors to Morro Bay.

Telephone and online surveys with tourism professionals and civic leaders were conducted from November to December 2007. Telephone and online surveys with visitors were conducted from December 2007 to May 2008.

DATA COLLECTION

Telephone Survey Facilities and Procedures

A central polling site at the Responsive Management office allowed for rigorous quality control over the interviews and data collection. To ensure the integrity of the telephone survey data, Responsive Management has interviewers who have been trained according to the standards established by the Council of American Survey Research Organizations. Methods of instruction included lecture and role-playing. The Survey Center Managers and other professional staff conducted project briefings with the interviewers prior to the administration of these surveys. Interviewers were instructed on type of study, study goals and objectives, handling of survey questions, interview length, termination points and qualifiers for participation, interviewer instructions within the survey instrument, reading of the survey instrument, skip patterns, and probing and clarifying techniques necessary for specific questions on the survey instrument. The Survey Center Managers and statisticians monitored the data collection to evaluate the performance of each interviewer and ensure the integrity of the data.

Telephone interviews with tourism professionals and civic leaders were conducted on business days, Monday through Friday, between the hours of 9:00 a.m. and 1:00 p.m. Pacific Standard Time (PST). Interviewers were instructed to ask for the named respondent on the list provided; however, if the primary contact was unlisted (e.g., in the case of a restaurant, hotel, or inn where only a business name was available), the interviewer was instructed to request an owner or general manager to complete the survey. Interviewers were asked not to leave messages on answering machines but to continue to call during different times of the day in an attempt to reach the respondent; they were authorized to leave messages in person (i.e., not on voice-mail)

and *only if* they contacted a person who could relay the message (e.g., office manager, administrative assistant, secretary). Interviewers were also instructed to obtain alternate numbers, if possible, and request a more convenient time to call the respondent. Telephone surveys of professionals and civic leaders were conducted and the data collected using Questionnaire Programming Language 4.1 (QPL).

Telephone surveys of Crescent City visitors were conducted on weekdays from 3:00 p.m. to 8:00 p.m., PST. As stated previously, the Crescent City/Del Norte County Chamber of Commerce provided names and addresses but not telephone numbers for visitors. Responsive Management performed a “telephone look-up” to match telephone numbers to the names and addresses. Interviewers were instructed to speak to the named respondent. A five-callback design was used to maintain the representativeness of the sample, to avoid bias toward people easy to reach by telephone, and to provide an equal opportunity for all to participate. When a respondent could not be reached on the first call, subsequent calls were placed on different days of the week and at different times of the day. This visitor survey was also administered, and data collected, using QPL.

Online Survey Procedures

A web-based survey instrument was developed for both the tourism professionals/civic leaders survey and the visitors survey. Responsive Management designed the web-based survey using QPL and converted it to HTML for online access. Respondents were provided a link, and survey data were collected using a Structured Query Language (SQL) database.

DATA ANALYSIS

The analysis of data was performed using Statistical Package for the Social Sciences (SPSS) software as well as proprietary software developed by Responsive Management. The analyses included an examination of the results among the sample of professionals and civic leaders as a whole as well as a breakdown of all results by city. For the visitor survey, the analysis was by city; no results were analyzed on the sample as a whole. Sampling errors could not be determined because the total potential sample populations could not be determined.

A NOTE ON READING THE REPORT

Note that some results may not sum to exactly 100% because of rounding. Additionally, rounding may cause apparent discrepancies of 1 percentage point between the graphs and the reported results of combined responses (e.g., when ratings are combined to show a range of great importance, moderate importance, and low importance).

The survey included several series of questions, and each series is meant to be examined as a whole, thereby showing relative differences among all the questions in that series. For instance, the survey asked seven questions about the importance of factors in visitors' decisions to visit the coastal communities, and the analysis shows which factors are more important than others. The survey also asked eight questions about the importance of factors in visitors' decisions on whether to go to a restaurant.

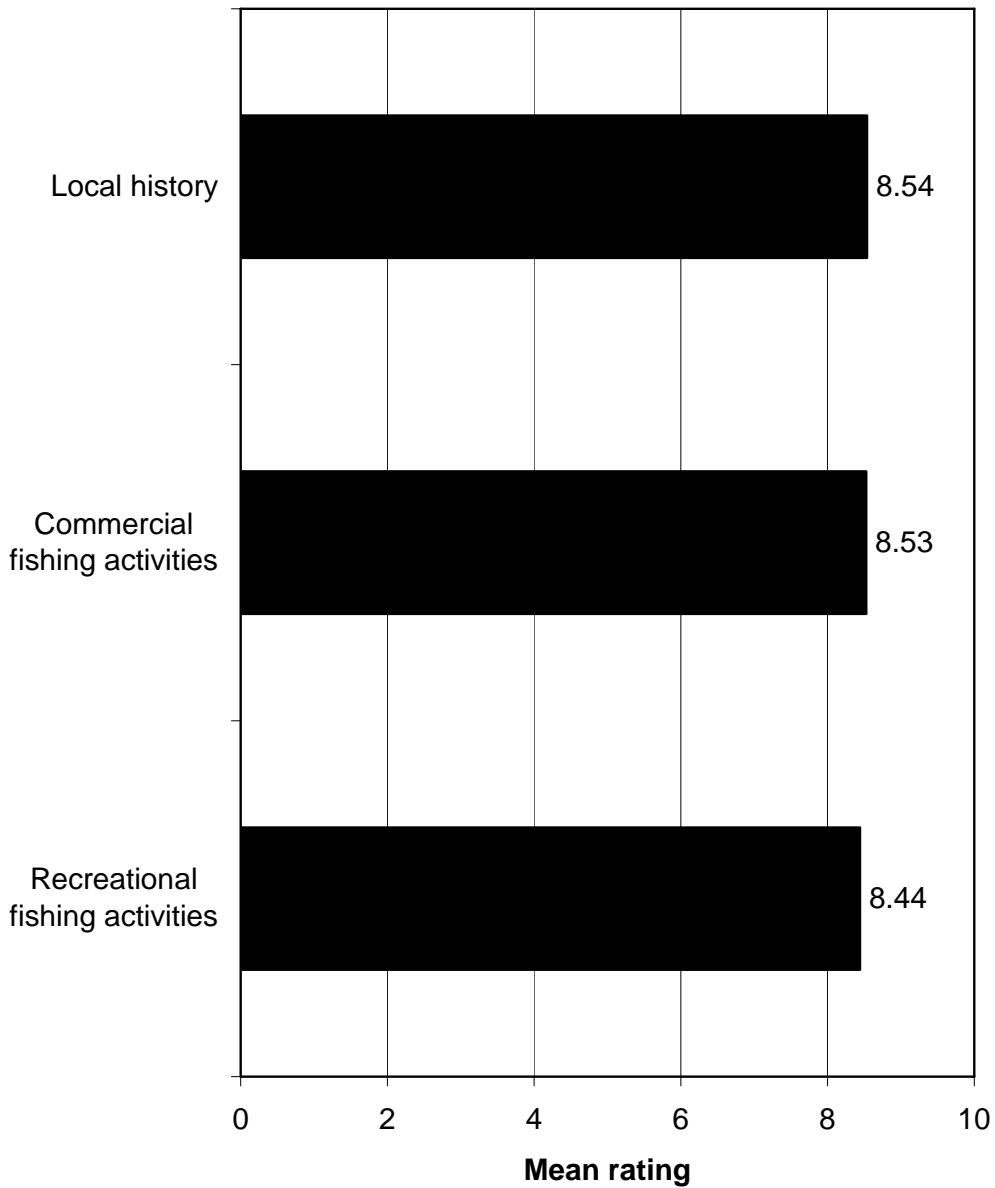
In addition, one part of the survey had 18 statements that were read to respondents, who were then asked whether they agreed or disagreed with each statement. Within this set of 18 questions were a series of statements that pertained to visiting coastal communities, a series of statements that pertained to seafood consumption, and a series that pertained to the fishing industry/other water-related industry. Note that some of these 18 statements pertained to more than one series and were, therefore, included in each series to which the statement applied. For instance, the statement, "When I go to Crescent City/Monterey/Morro Bay, I like to see fishing boats," was included in the series of questions about visiting coastal communities and in the series of questions about seafood consumption. Therefore, the results concerning this statement were examined relative to other statements in two series (i.e., the results were discussed twice); but these two series are in different sections of the report. This multiple reporting of some results was done intentionally in those places where the results pertain to more than one section of the report.

TOURISM PROFESSIONALS AND CIVIC LEADERS SURVEY RESULTS

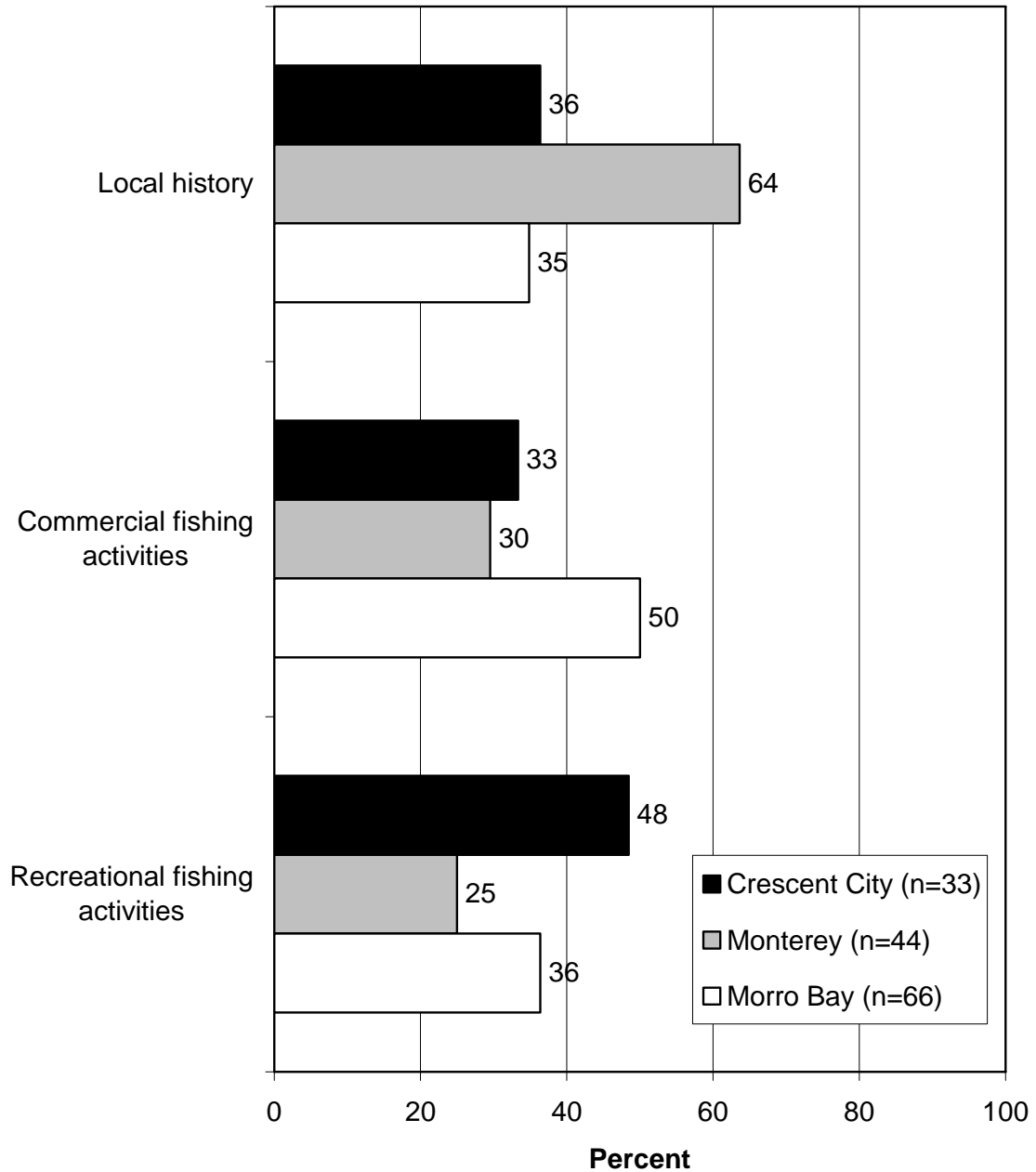
COMMUNITY IDENTITY

- Tourism professionals and civic leaders in the three communities were asked to rate the importance of three factors influencing their community's identity: local history, commercial fishing, and recreational fishing. For all communities, tourism professionals and civic leaders rated the three factors highly as having an important influence on their community's identity. Using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, the mean rating for local history's importance to community identity was 8.54, the mean rating for the importance of commercial fishing activities was 8.53, and the mean rating for the importance of recreational fishing activities was 8.44. This similarity in the rating of these factors highlights the relative importance of *all* three factors on establishing community identity in California's coastal communities.
- Crescent City respondents give notably higher ratings to recreational fishing activities, relative to respondents from other communities: 48% of tourism professionals and civic leaders in Crescent City rate recreational fishing activities as extremely important to community identity, compared to 36% in Morro Bay and 25% in Monterey.
 - Monterey professionals and civic leaders give notably higher ratings to local history, relative to respondents from the other communities. Indeed, 64% of Monterey professionals and civic leaders rate local history as extremely important to the identity of the Monterey community. This is nearly double the percentage of professionals and civic leaders who rate local history as extremely important in Crescent City (36%) and Morro Bay (35%).
 - Morro Bay professionals and civic leaders give notably higher ratings to commercial fishing activities, relative to respondents from the other communities: 50% of professionals and civic leaders surveyed in Morro Bay rate commercial fishing activities as extremely important to the identity of their community compared to 33% in Crescent City and 30% in Monterey.

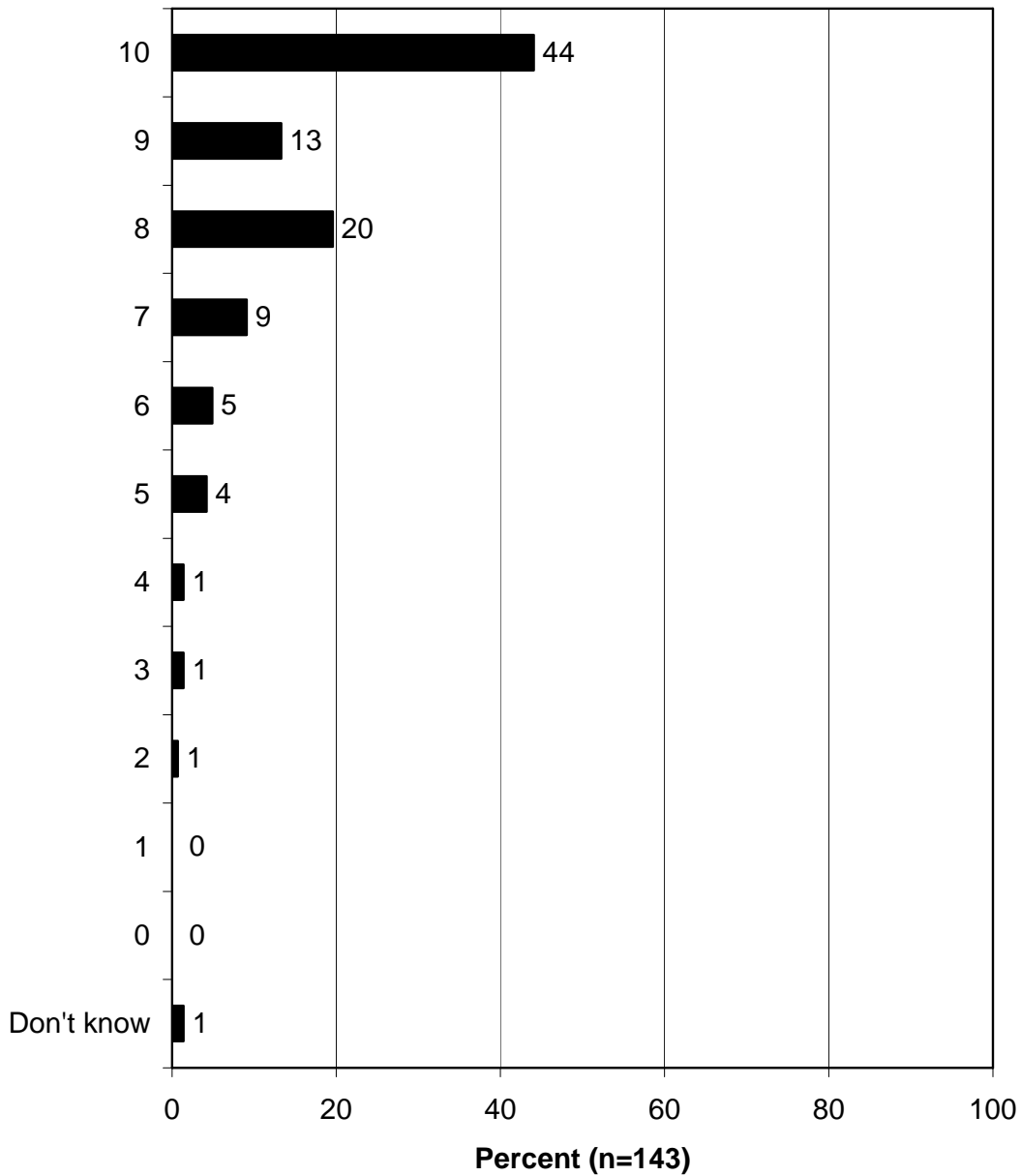
Q8, 10-11. On a scale of 0 - 10, where 0 is "not at all important" and 10 is "extremely important," the mean rating of importance for the following factors on the coastal community's identity.



Q8, 10-11. Percentage giving a rating of 10 for the importance of the following on the identity of their community (using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important). (Ranked by the total.)

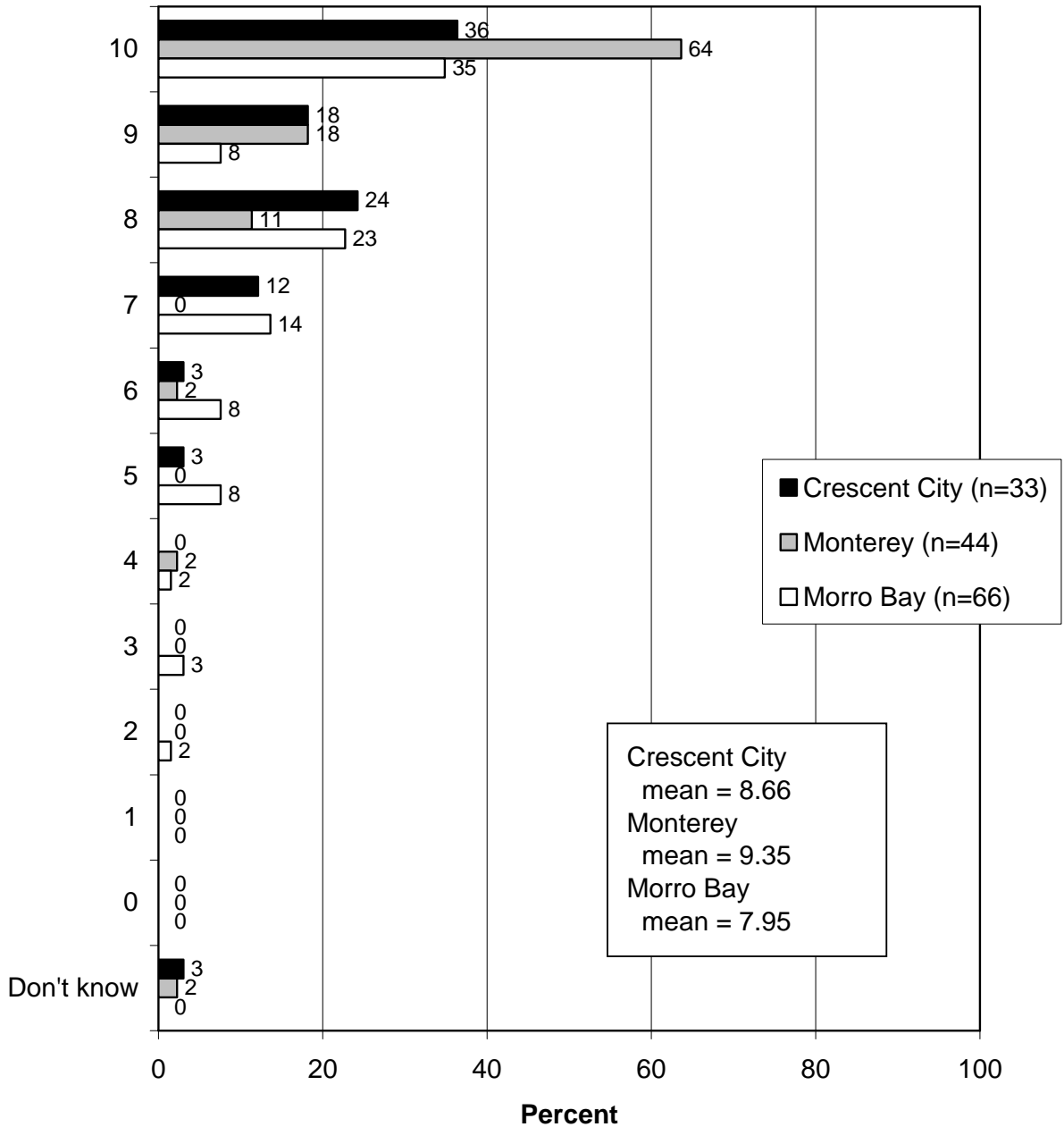


Q8. What about local history?
(Please rate the importance of local history on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)

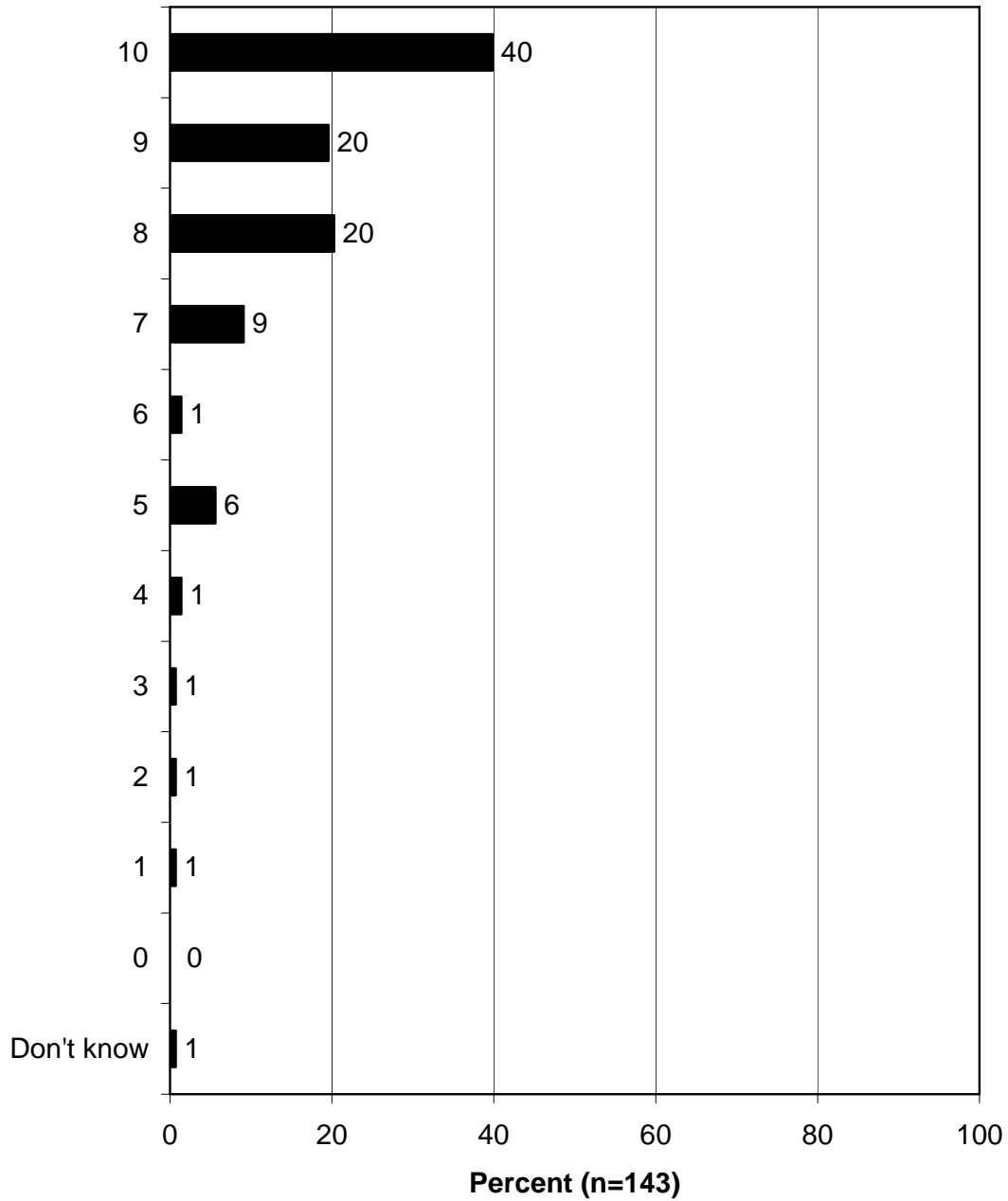


Q8. What about local history?

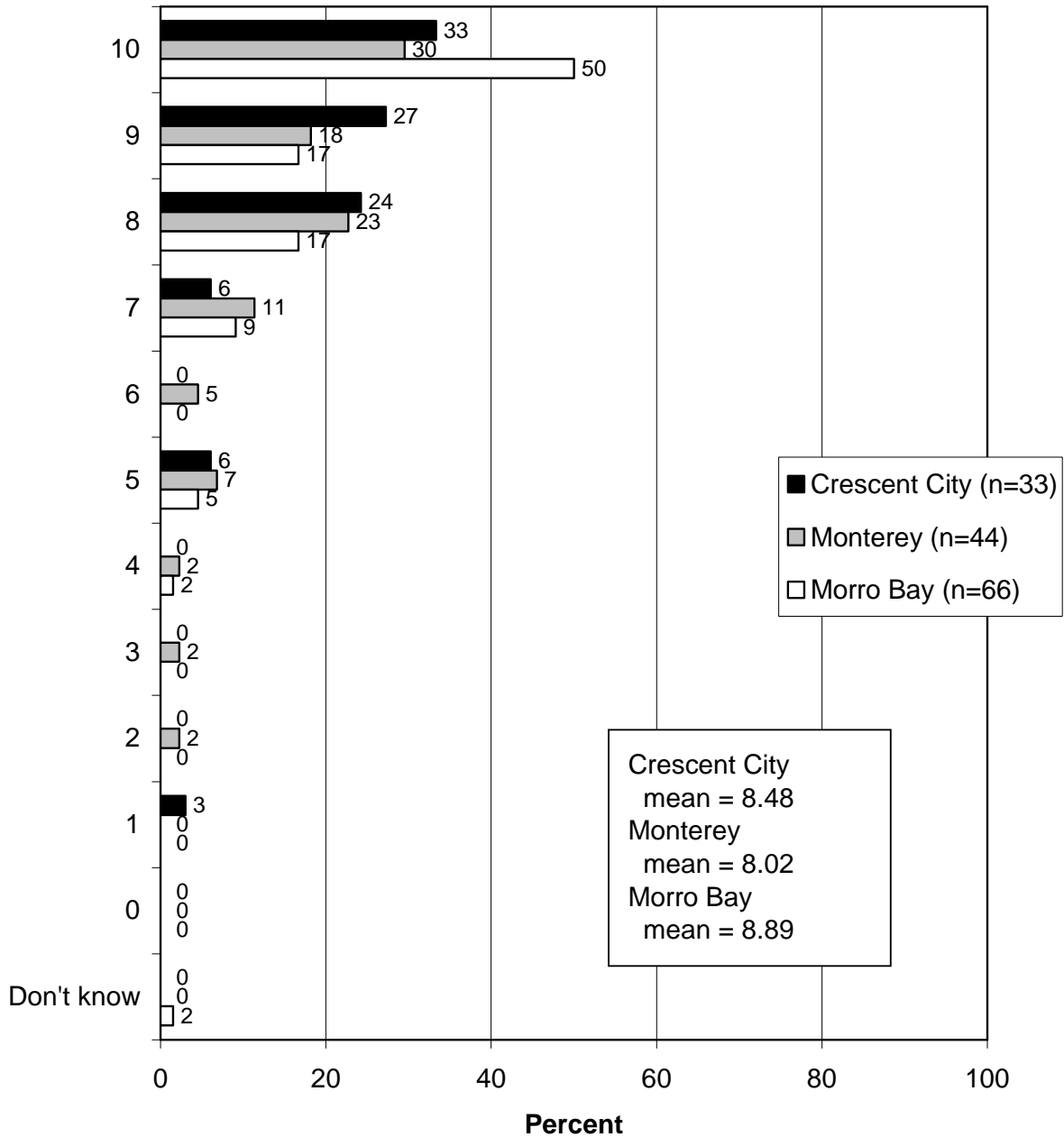
(Please rate the importance of local history on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



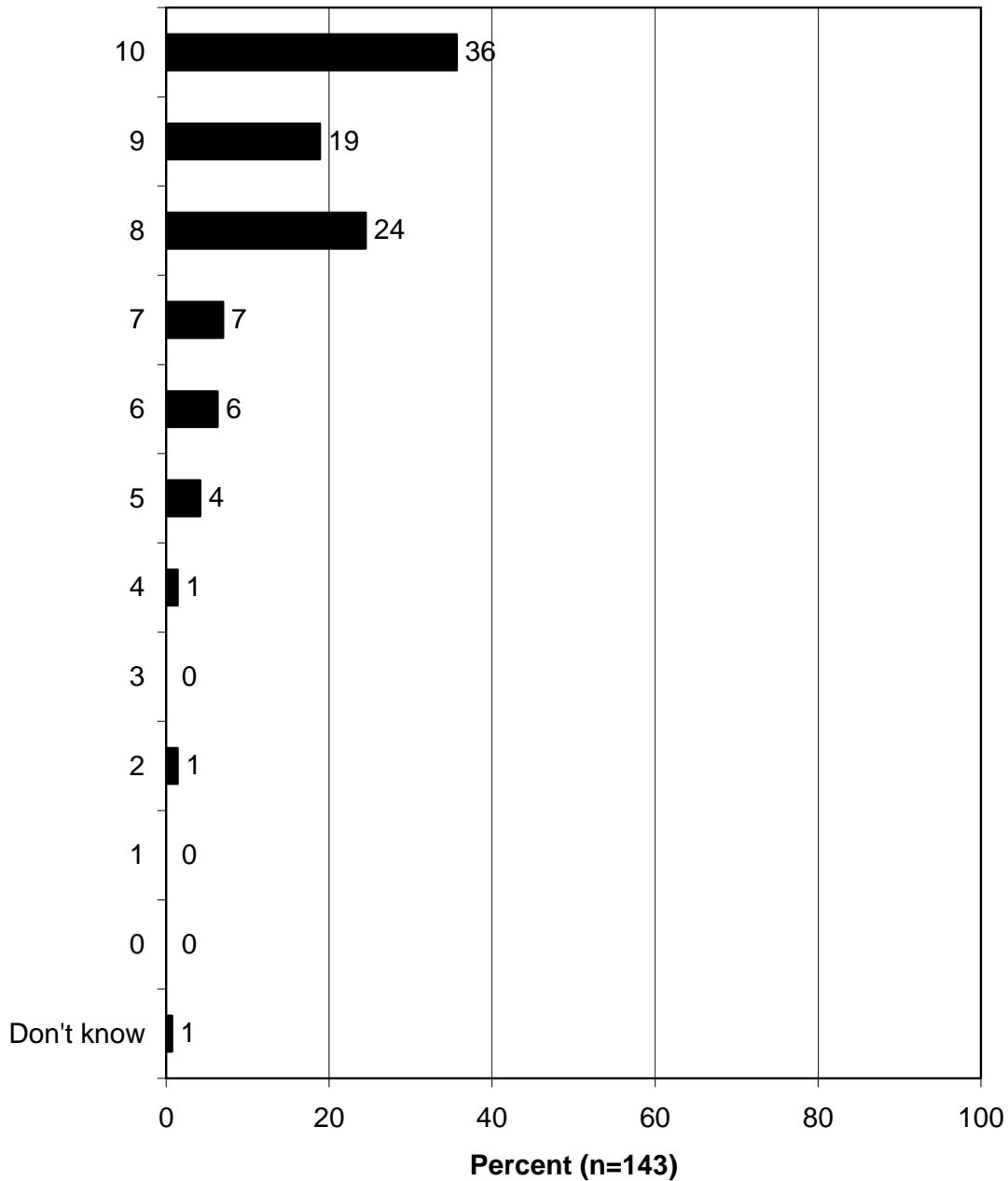
Q10. What about commercial fishing activities?
(Please rate the importance of commercial fishing activities on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



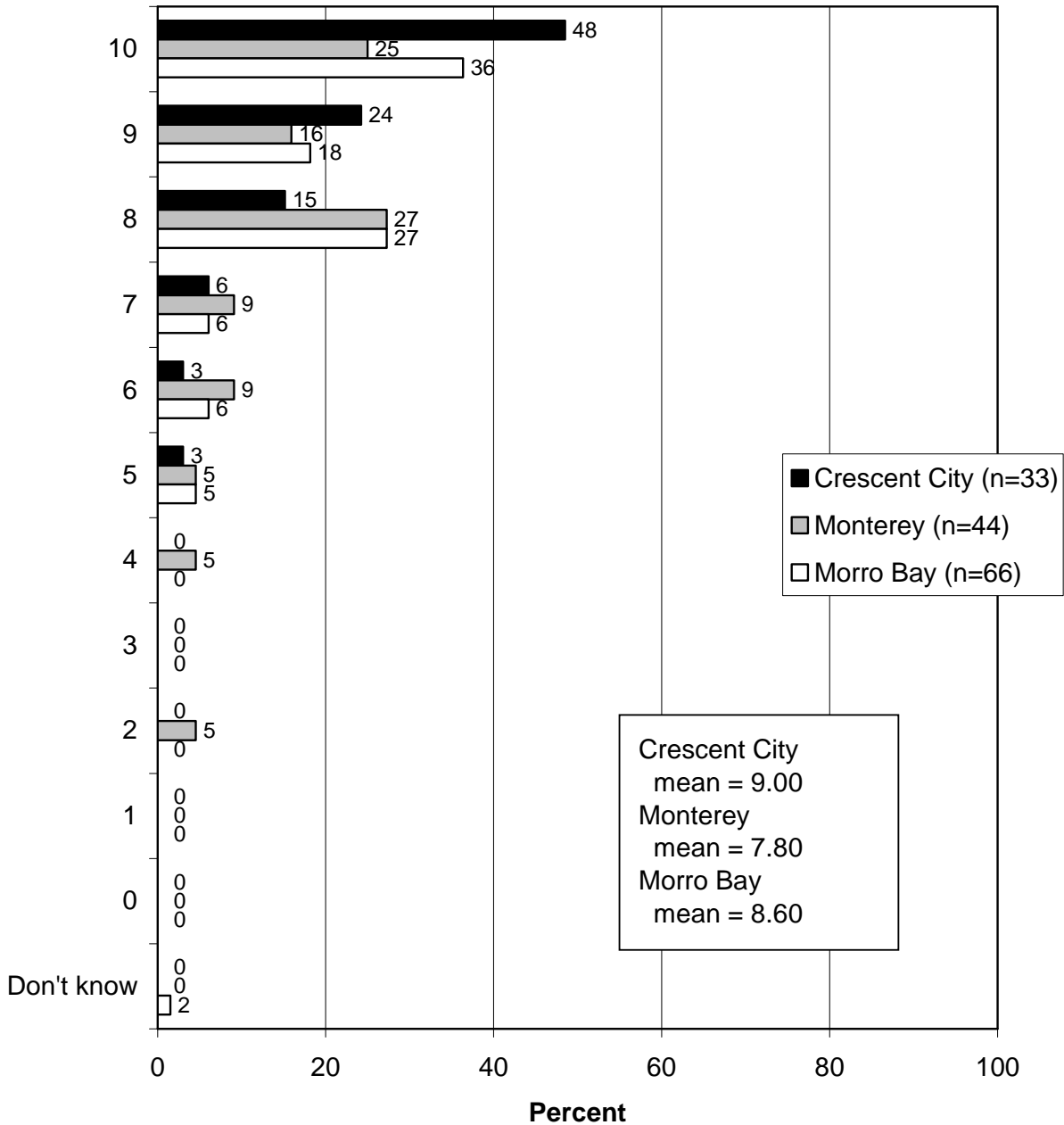
Q10. What about commercial fishing activities?
 (Please rate the importance of commercial fishing activities on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



**Q11. What about recreational fishing activities?
(Please rate the importance of recreational fishing activities on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)**



**Q11. What about recreational fishing activities?
 (Please rate the importance of recreational fishing activities on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)**



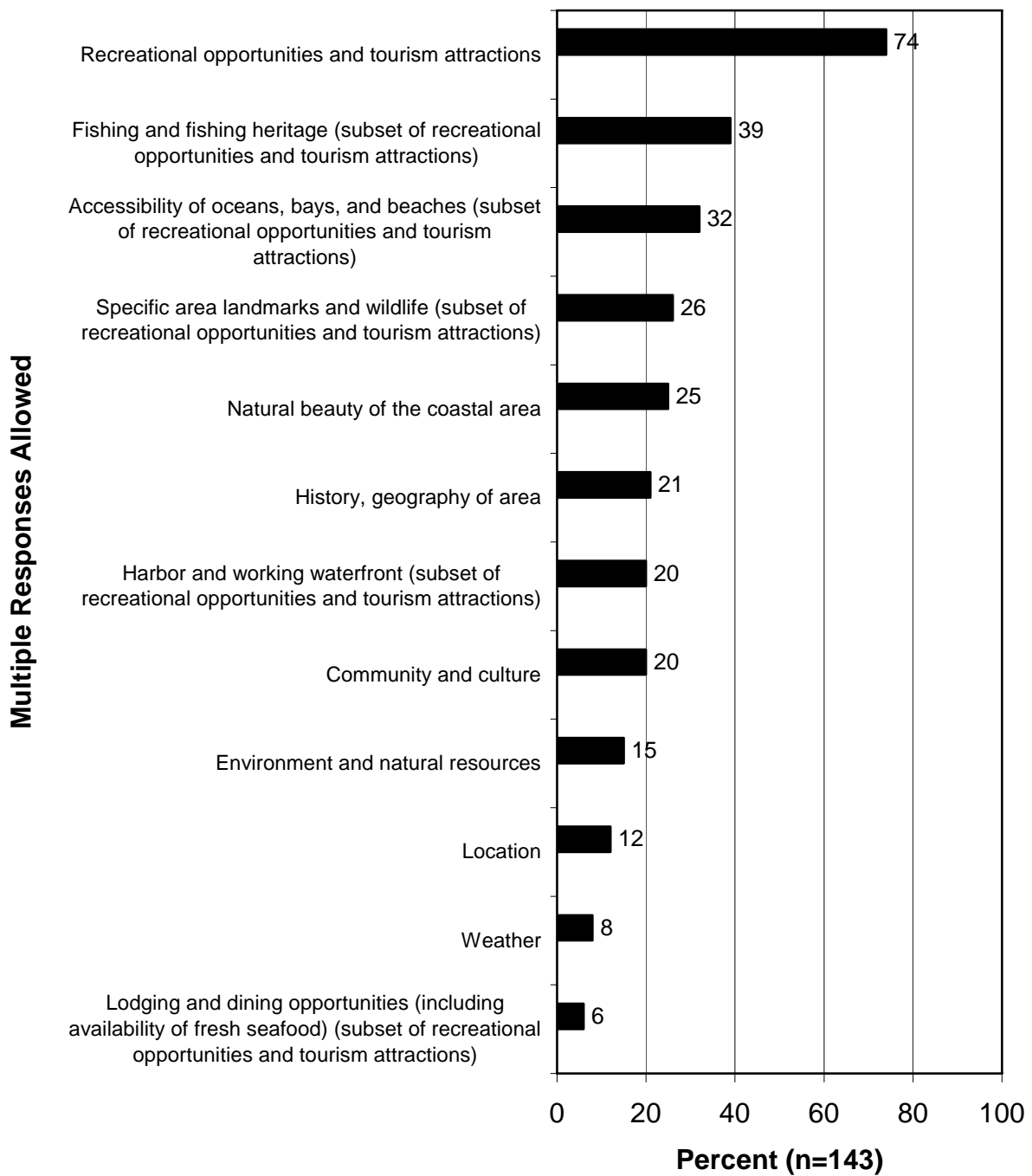
COMMUNITY UNIQUENESS

- In identifying the things that make their community unique, 74% of all tourism professionals and civic leaders cite some form of recreational opportunities or tourism attractions. The specific recreational opportunities and tourism attractions that are cited include fishing and fishing heritage (39%), oceans, bays, and beaches (32%), specific area landmarks and wildlife (26%), harbors and working waterfronts (20%), and lodging and dining opportunities (6%).

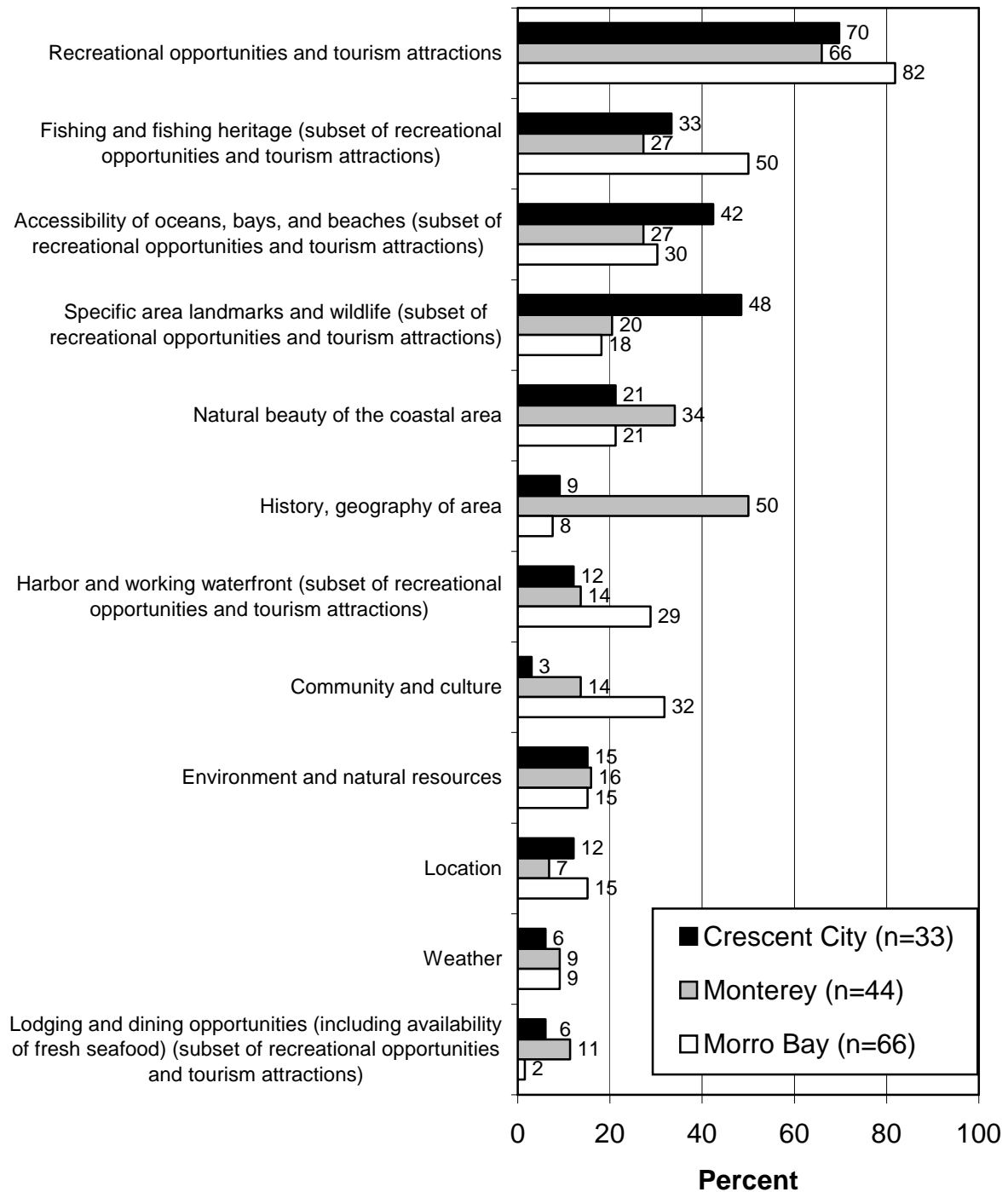
- In addition to recreational opportunities and tourism attractions, professionals and civic leaders also highlight a number of other features attracting visitors to their respective communities: 25% of all tourism professionals and civic leaders cite the natural beauty of the coastal area; 21% cite the history and/or geography of the area; and 20% identify community and culture as qualities that make their community unique to visitors. Additional factors include the environment and natural resources, location, and weather.

- Relative to the other communities, Crescent City respondents more often name specific area landmarks and wildlife; Monterey respondents more often name the history and geography; and Morro Bay respondents more often name community and culture.

Q25. What makes your community unique to tourists?



Q25. What makes your community unique to tourists?



FACTORS INFLUENCING A COMMUNITY'S ECONOMY

- Tourism professionals and civic leaders were asked to rate the importance six factors influencing their community's economy, using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important; these factors to be rated were manufacturing, commercial fishing, recreational fishing, tourism, the availability of local seafood, and tourism generated by having the public be able to see a working waterfront. Tourism is the most important, having the highest mean rating (9.53) and having the highest percentage of professionals and civic leaders giving it a rating of 10 (73% rated it 10). Local seafood for purchase (mean rating 8.85, with 57% rating it 10) and tourism from having an active waterfront (mean rating of 8.82, with 50% rating it 10) are the next most important factors. These are followed by two factors grouped together with slightly lower ratings, relative to those just mentioned, although still well above the mid-point of the scale: commercial fishing (7.98 mean rating; 37% rating it 10) and recreational fishing (7.87 mean rating; 29% rating it 10). The lowest rated factor is manufacturing (5.38 mean rating; 13% rating it 10).
 - Crescent City respondents give notably higher ratings to manufacturing, relative to respondents from the other communities.
 - Monterey respondents give notably higher ratings to tourism, relative to respondents from the other communities.
 - Morro Bay respondents give notably higher ratings to tourism generated by having a working waterfront, relative to respondents from the other communities.

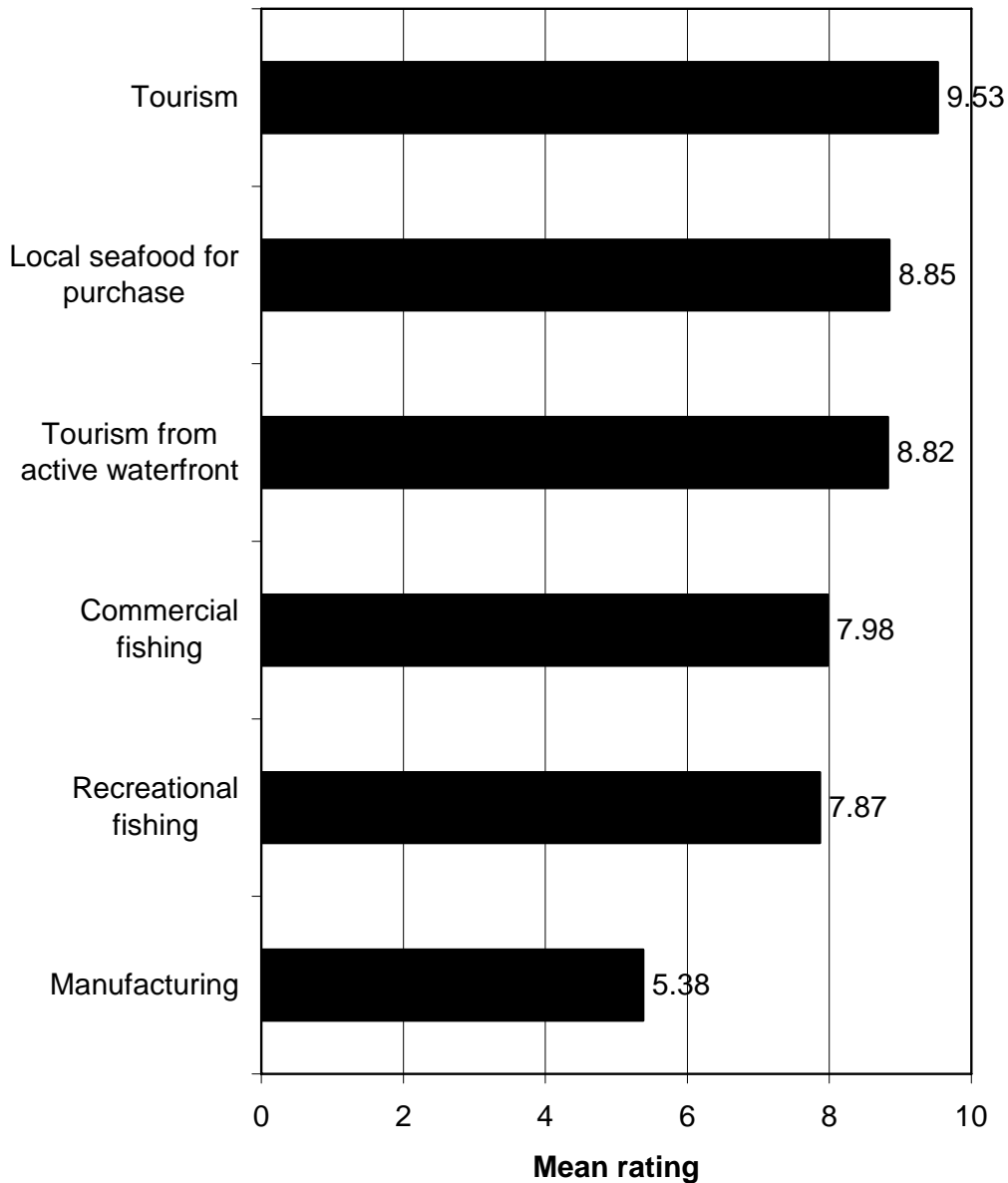
- Overall, 58% of tourism professionals and civic leaders indicate that the number of jobs *directly* created by fishing activities is of great importance to their community's economy (they rate it 8 or above on a scale of 0 to 10); 29% give a moderate rating (a rating of 3-7); and 3% indicate that the actual number of jobs *directly* created by fishing activities is of low importance to the community's economy (a rating of 0-2).
 - Morro Bay respondents give higher ratings concerning the importance of the number of jobs *directly* created by fishing activities, relative to respondents from the other communities.

- Nearly identical results were reported for the importance of the number of jobs *indirectly* created by fishing activities, with 58% of tourism professionals and civic leaders reporting that this factor is of great importance to their community's economy (a rating of 8 or above), 29% rating this factor of moderate importance (a rating of 3-7), and 4% indicating that the number of jobs *indirectly* created by fishing activities is of low importance to the community's economy (a rating of 0-2).

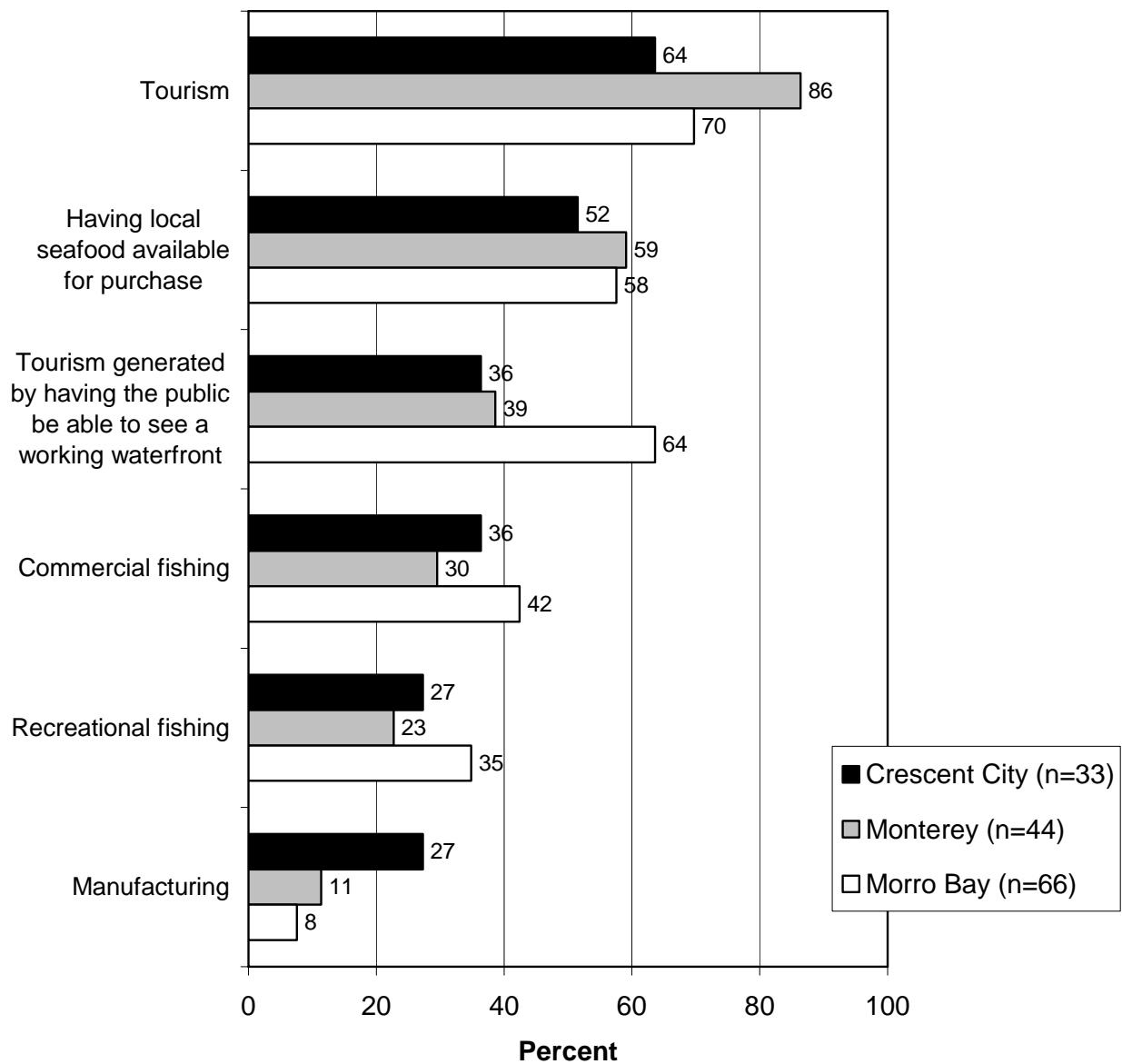
- Nearly two-thirds of all tourism professionals and civic leaders surveyed (63%) indicate that the fishing heritage of their community is of great importance in attracting business to their community (they rate it 8 or above); 31% rate its importance as moderate (a rating of 3-7); and only 3% indicate that fishing heritage is of low importance in attracting business to their community (a rating of 0-2).
 - Morro Bay respondents give notably higher ratings to fishing heritage, relative to respondents from the other communities.

- The majority of all tourism professionals and civic leaders surveyed (74%) indicate that having local, fresh seafood available is of great importance in attracting business to their community (a rating of 8 or above on a scale of 0 to 10); 25% rate its importance as moderate (a rating of 3-7); and only 2% indicate that having local, fresh seafood available is of low importance in attracting business to their community (a rating of 0-2).
 - Monterey and Morro Bay respondents give notably higher ratings for having local, fresh seafood available, relative to respondents from Crescent City.

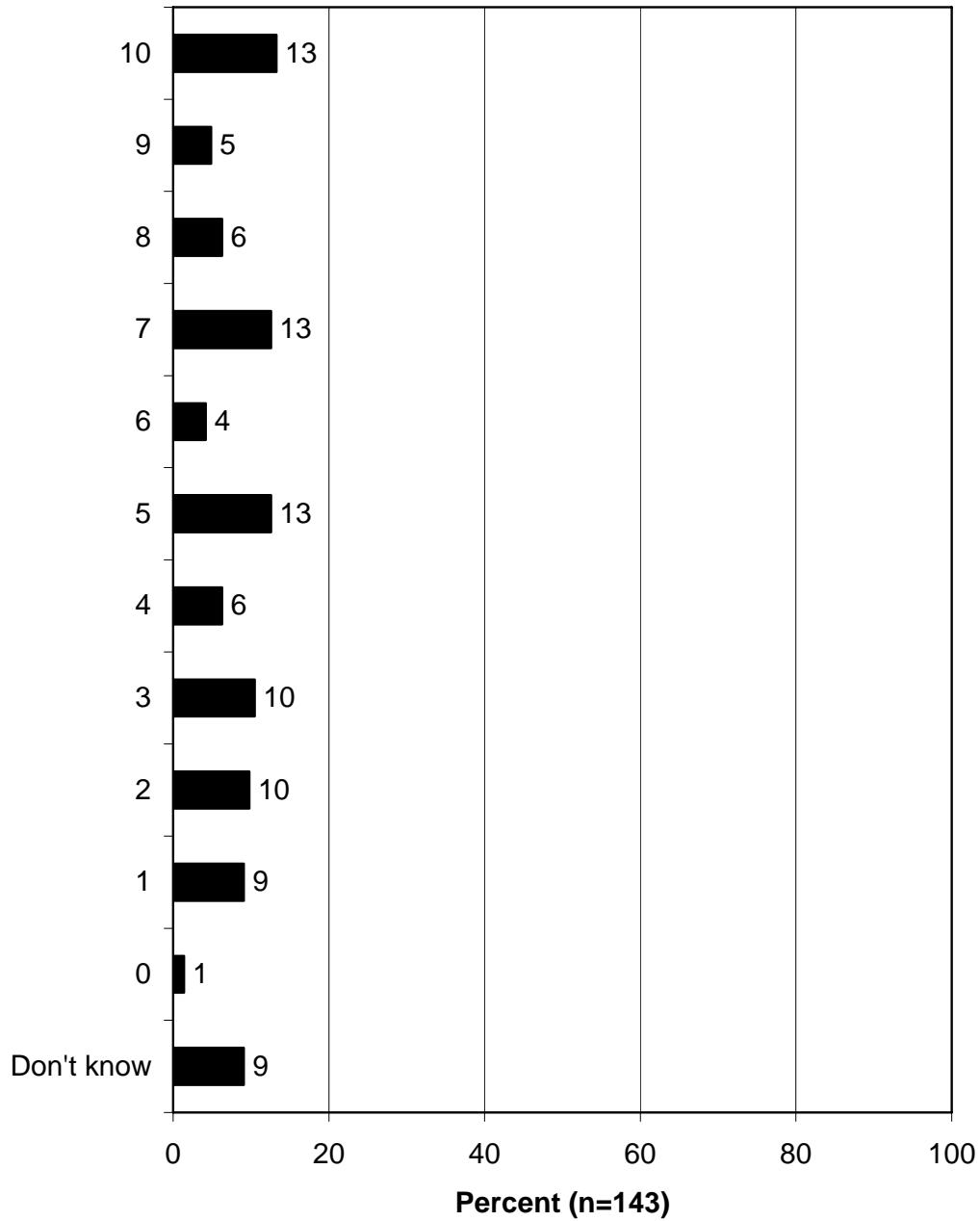
Q14-19. On a scale of 0 - 10, where 0 is "not at all important" and 10 is "extremely important," the mean rating of importance for the following factors on the coastal community's economy.



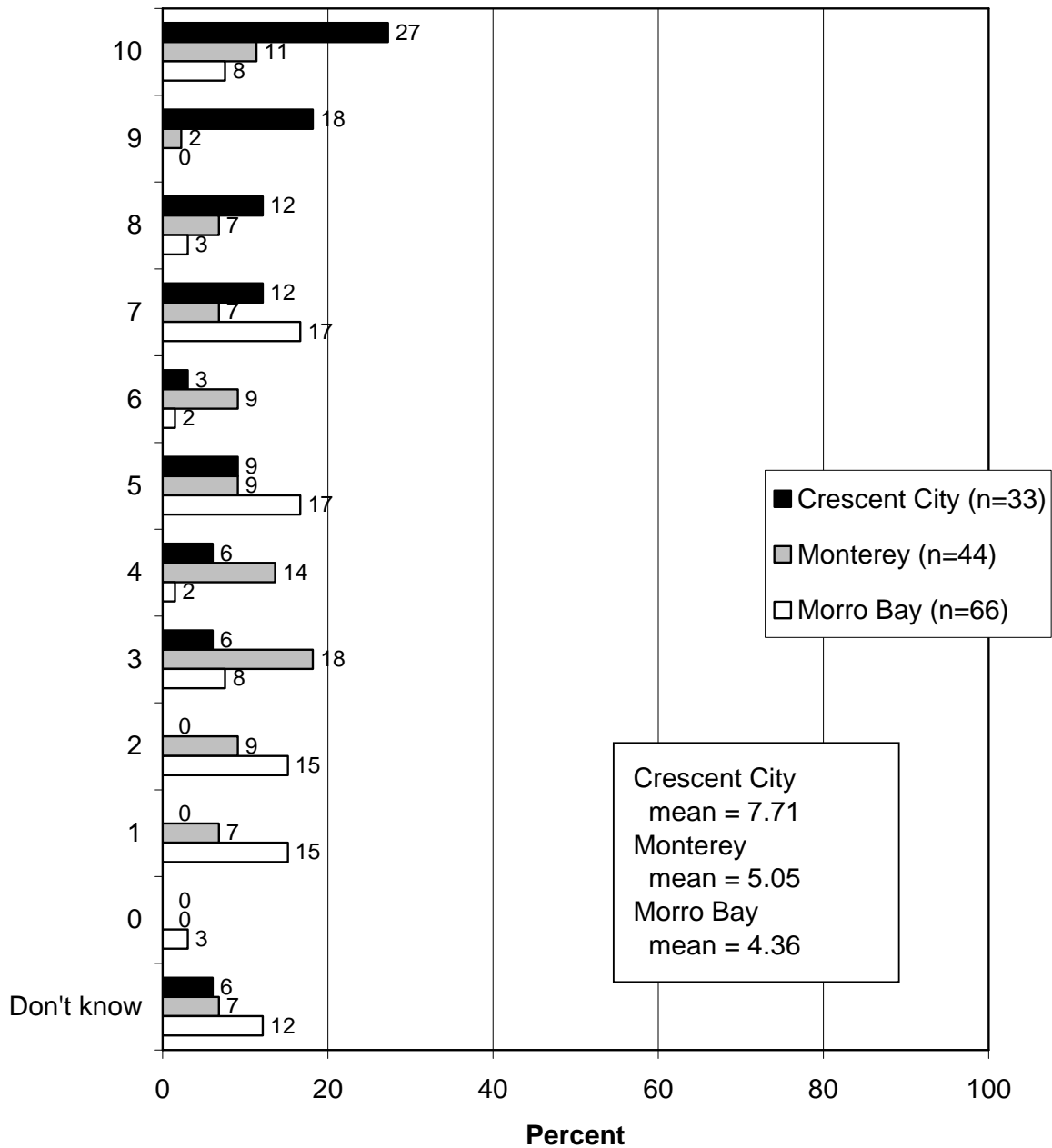
Q14-19. Percentage giving a rating of 10 for the importance of the following on the economy of their community (using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important). (Ranked by the total.)



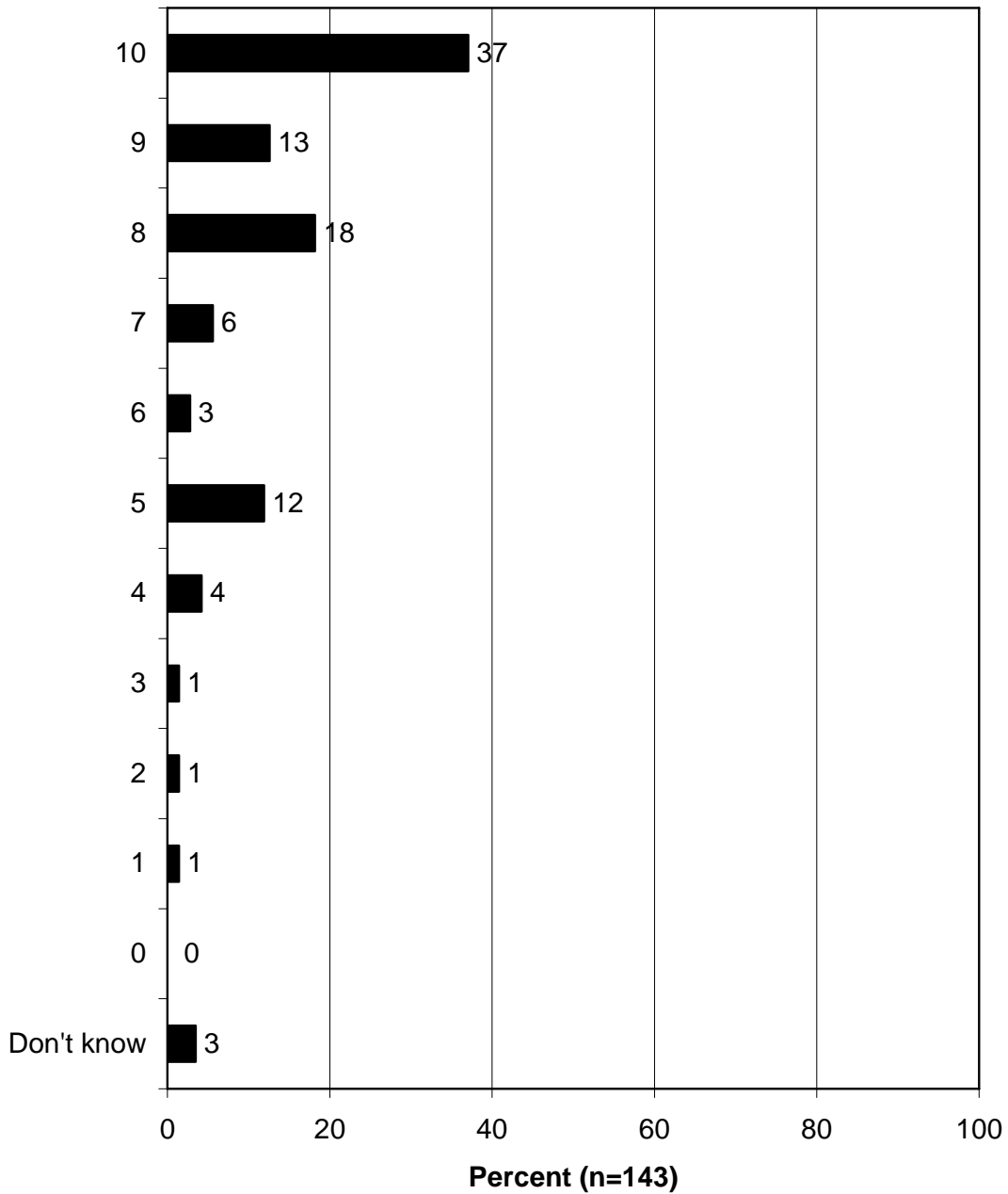
Q14. What about manufacturing?
(Please rate the importance of manufacturing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



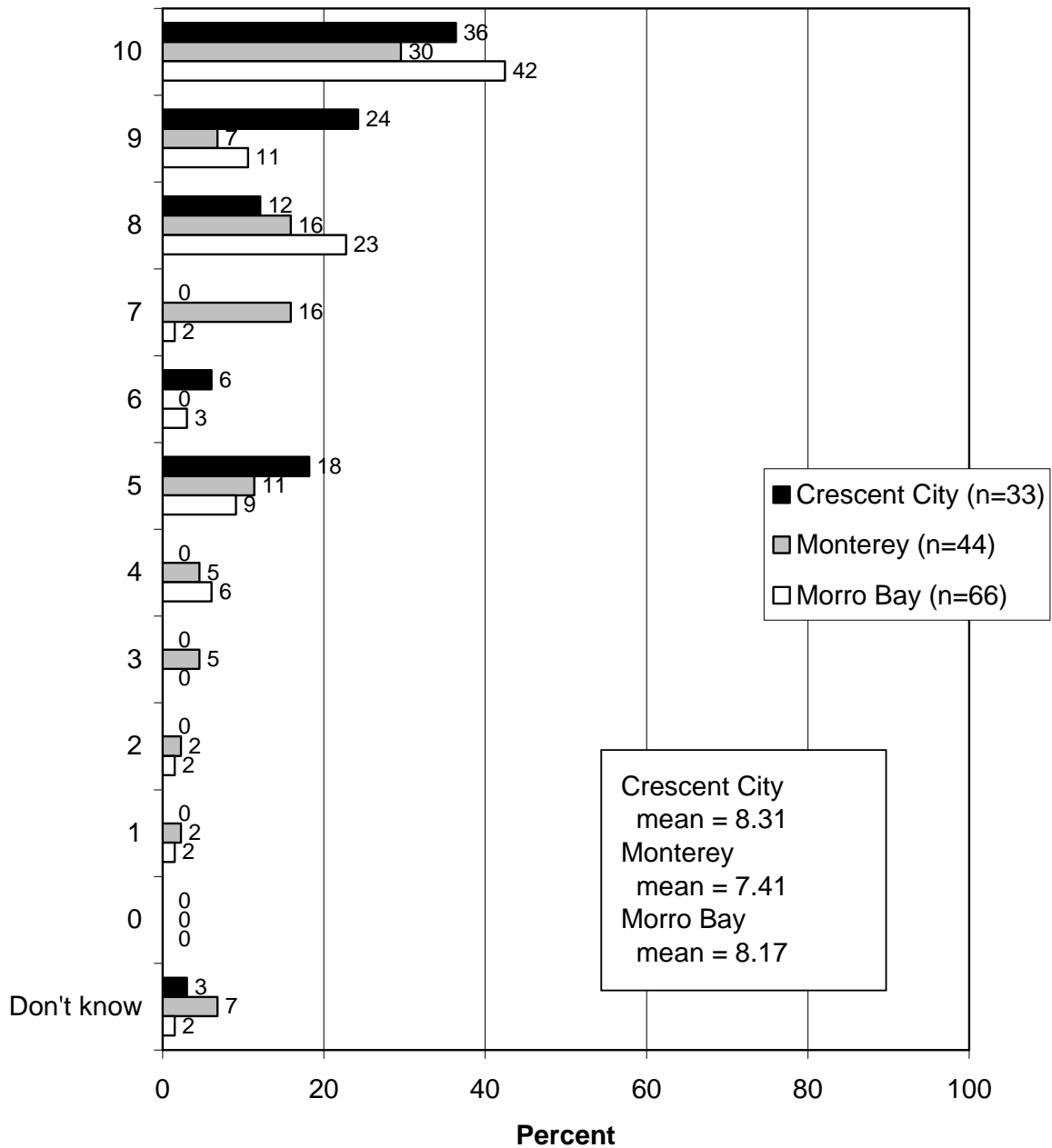
Q14. What about manufacturing?
 (Please rate the importance of manufacturing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



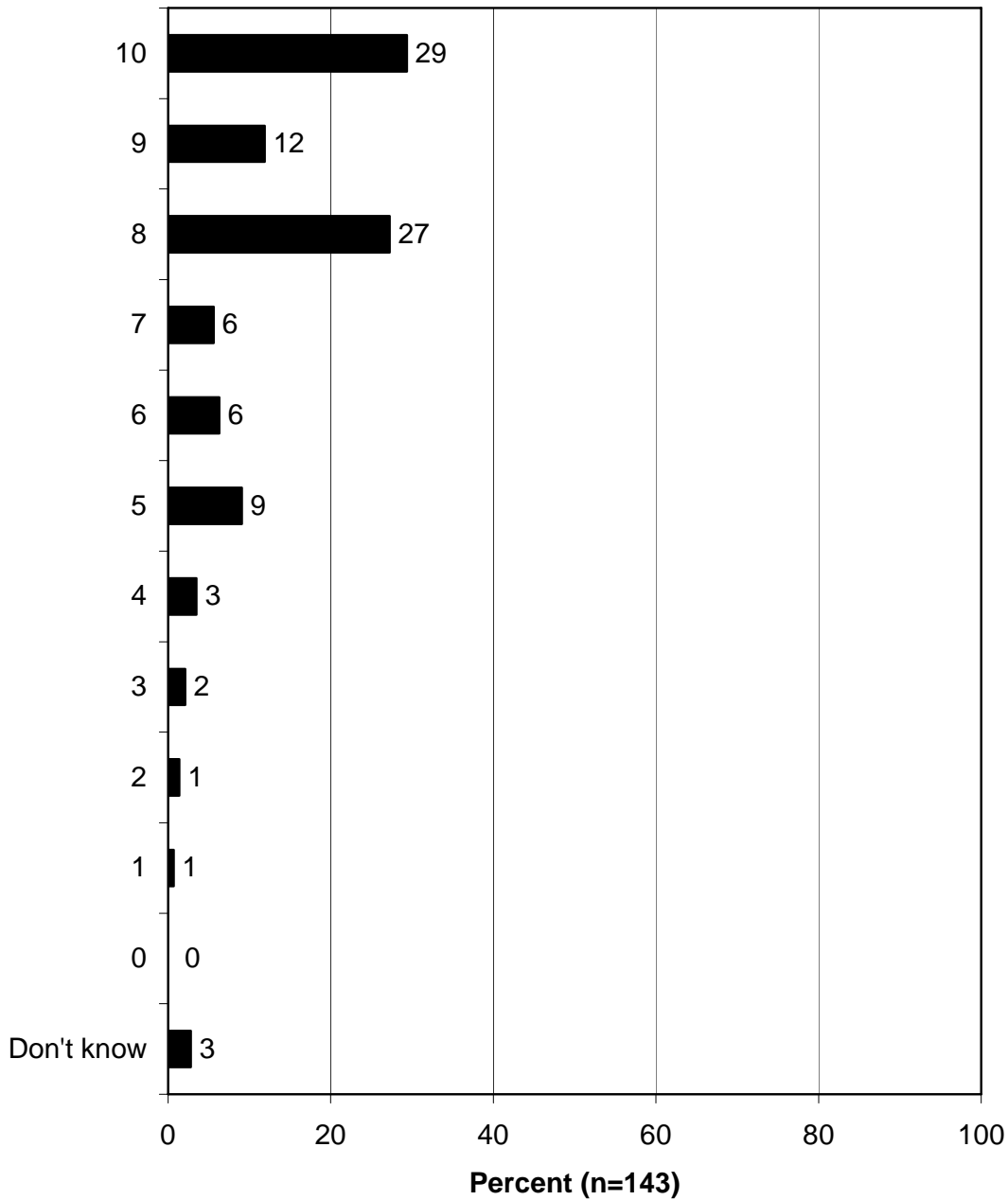
Q15. What about commercial fishing?
(Please rate the importance of commercial fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



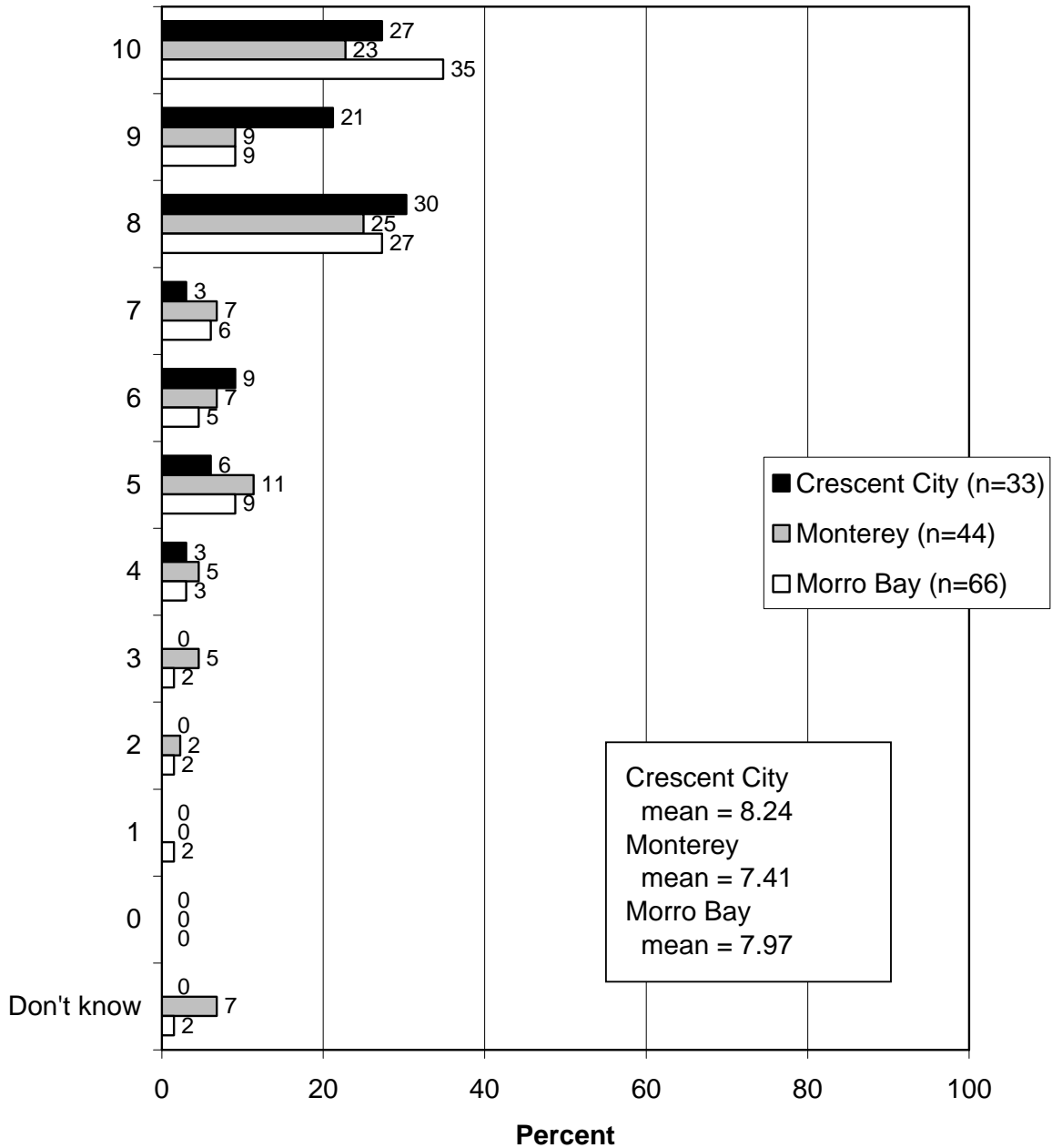
Q15. What about commercial fishing?
 (Please rate the importance of commercial fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



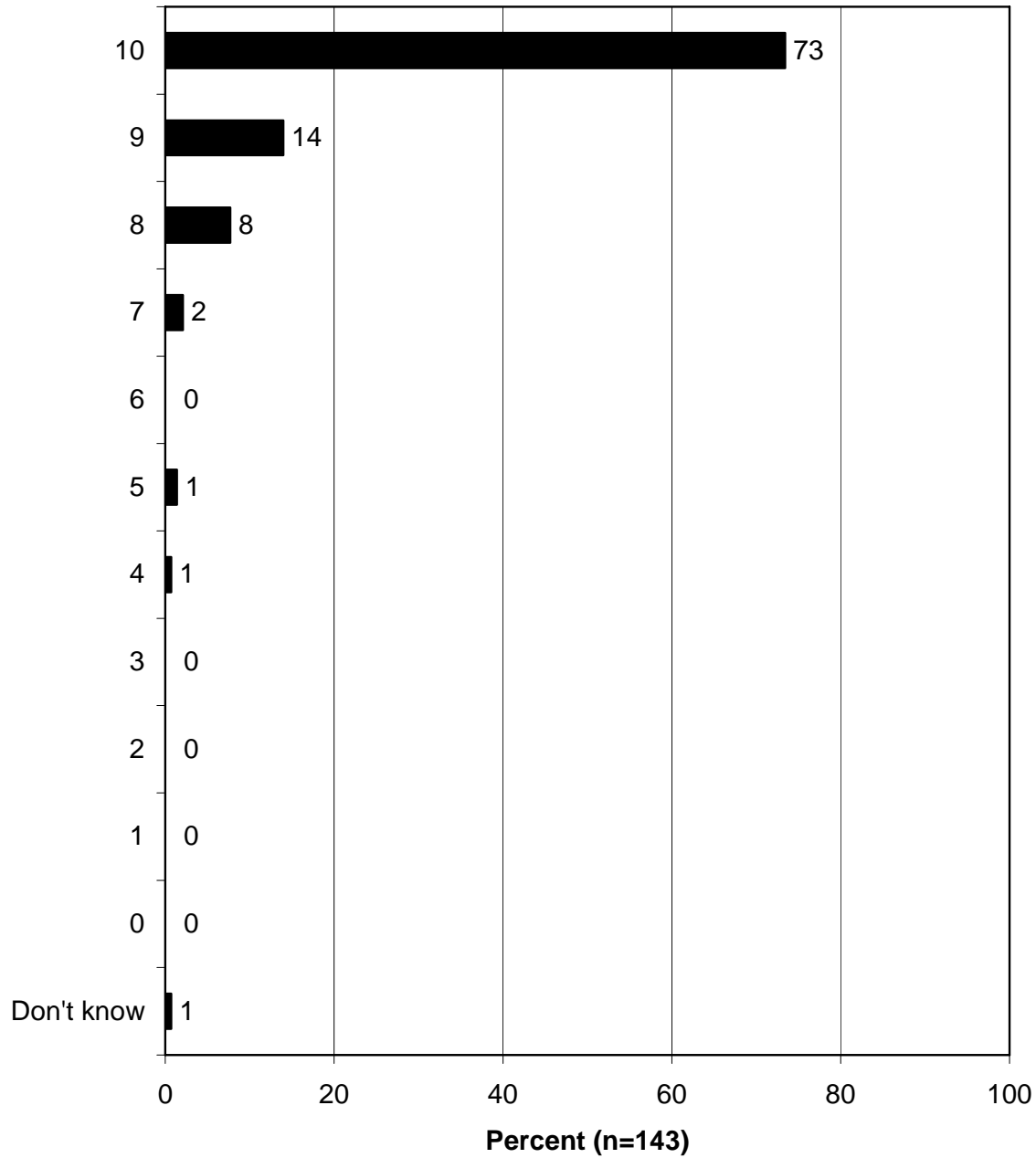
Q16. What about recreational fishing?
(Please rate the importance of recreational fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



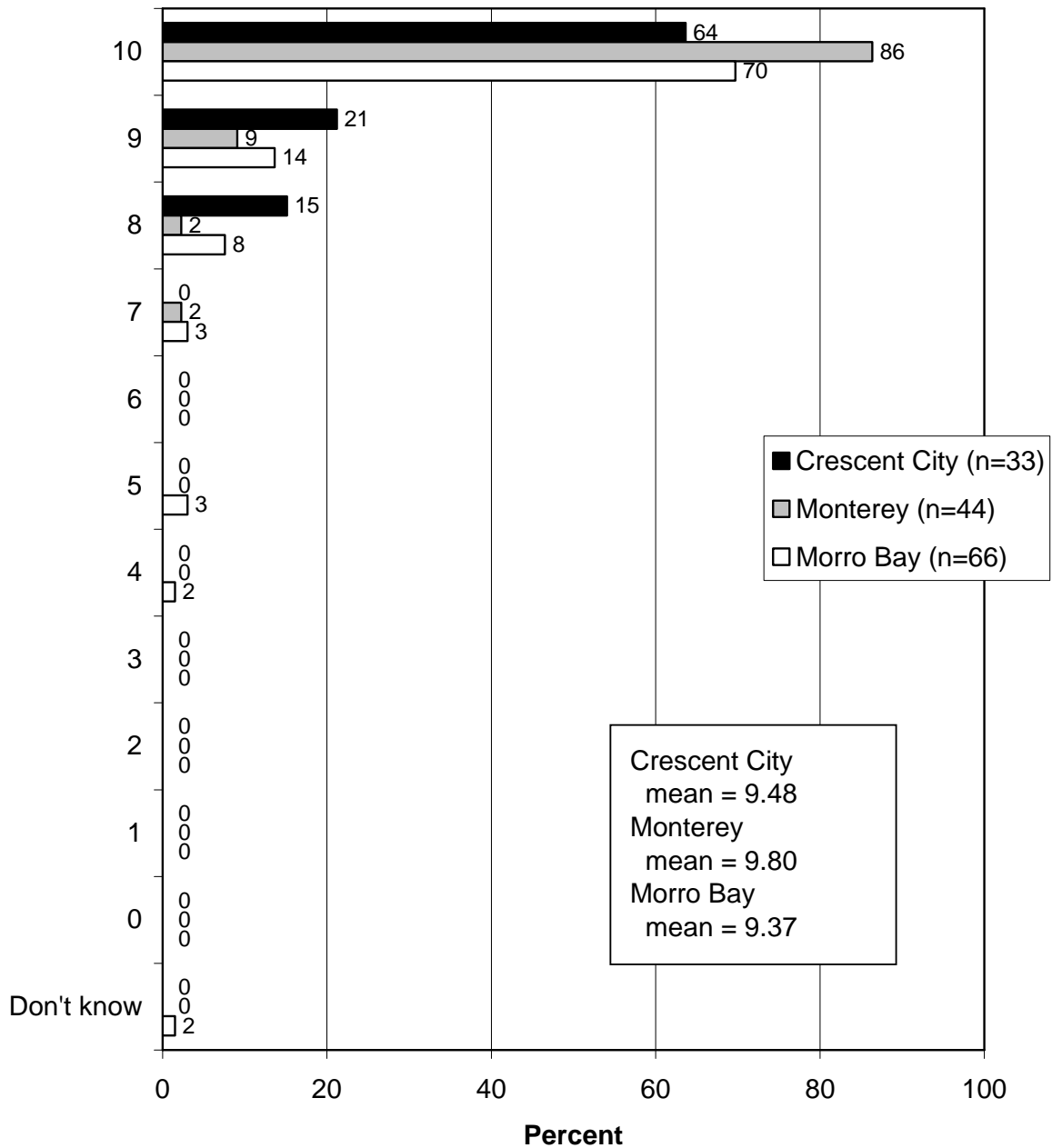
Q16. What about recreational fishing?
 (Please rate the importance of recreational fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



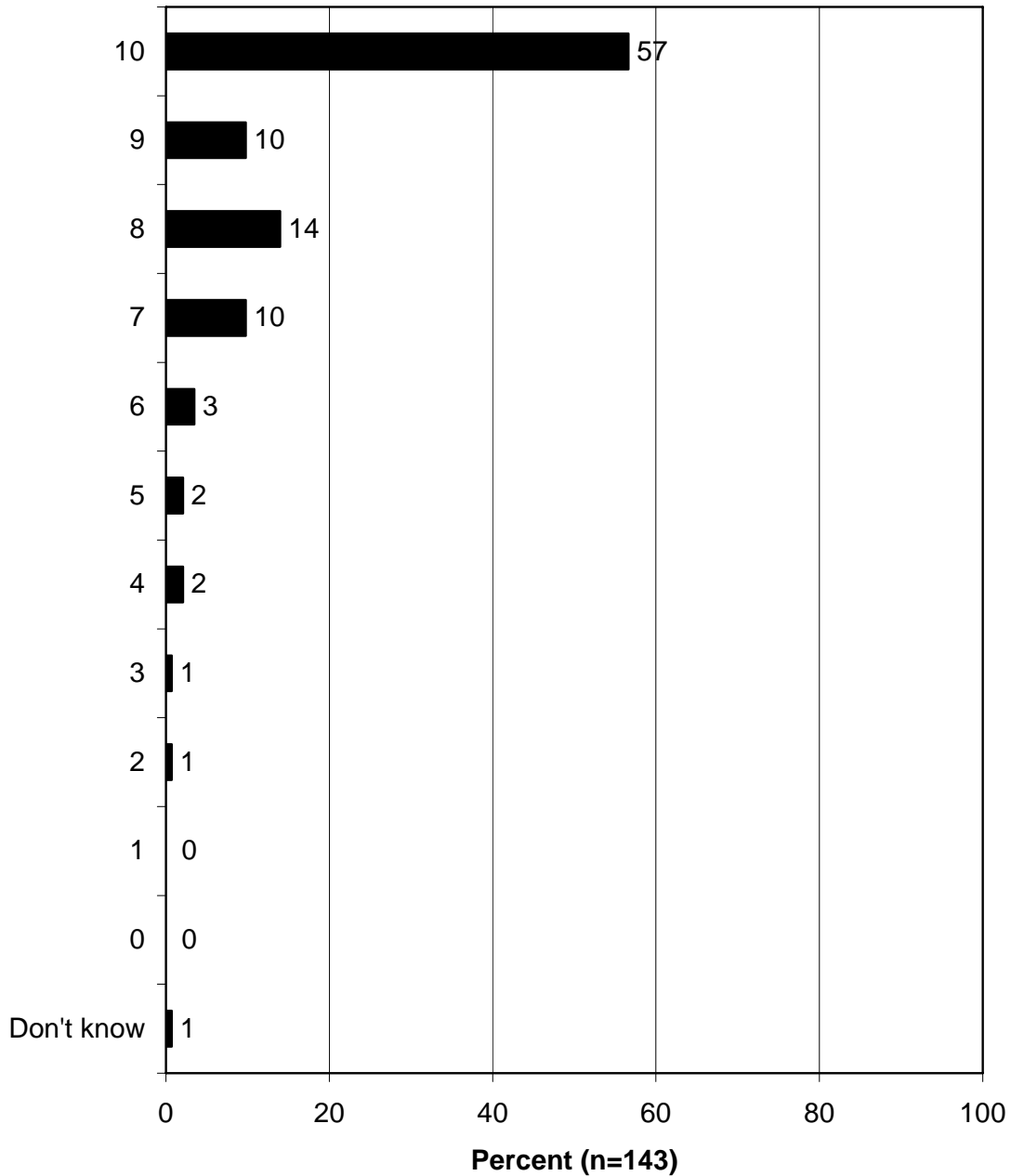
Q17. What about tourism?
(Please rate the importance of tourism on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



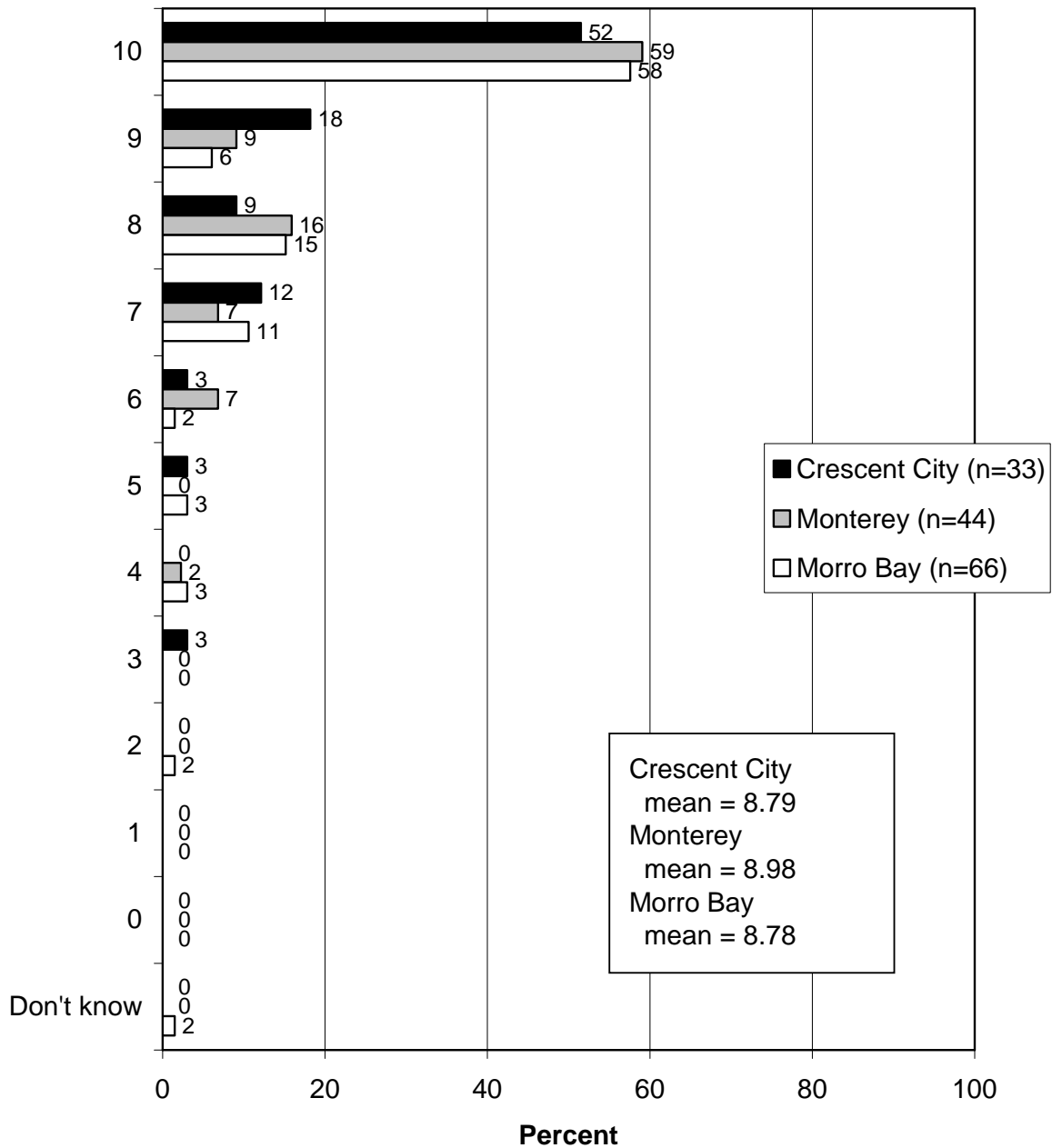
Q17. What about tourism?
 (Please rate the importance of tourism on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



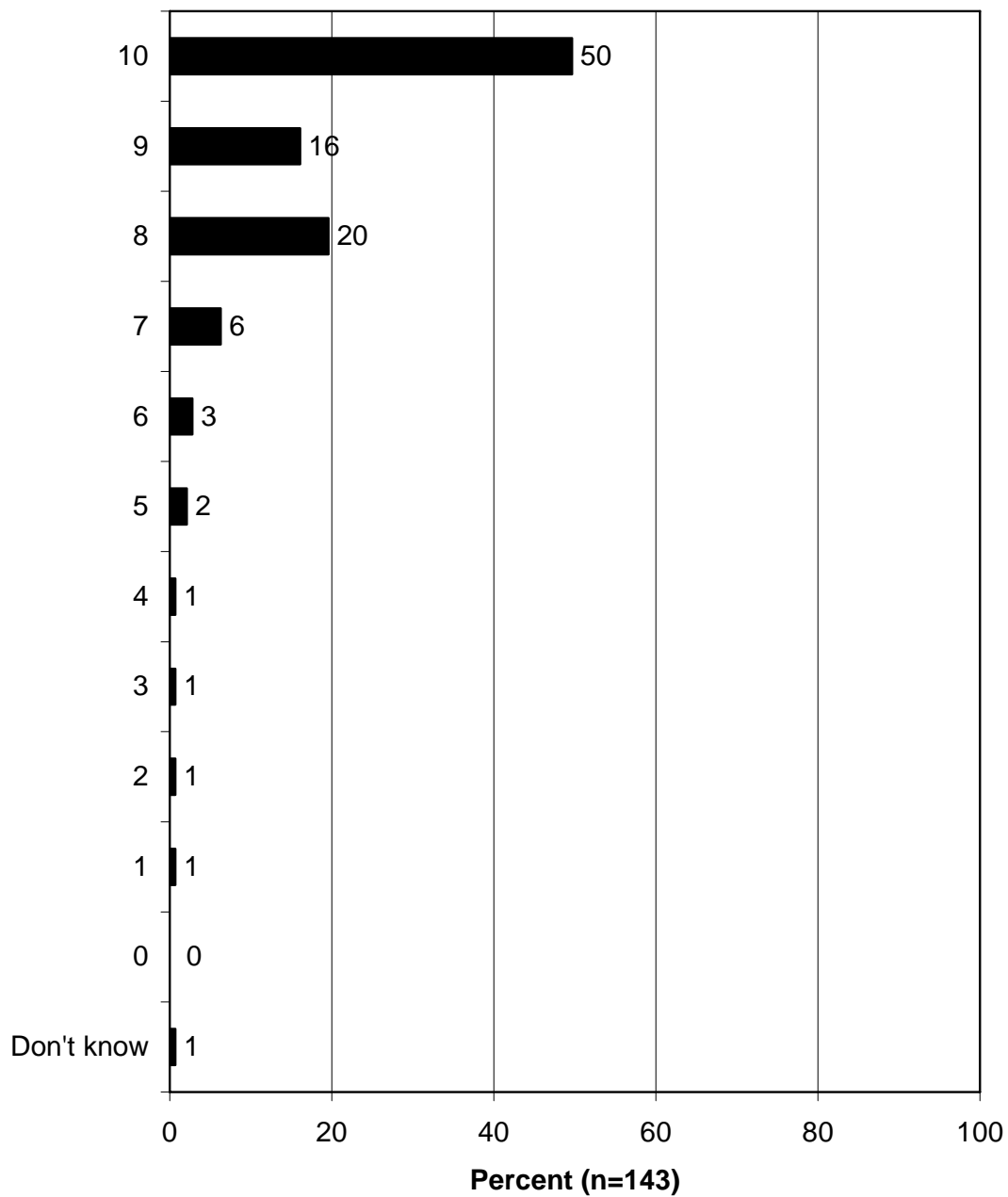
Q18. What about having local seafood available for purchase? (Please rate the importance of having local seafood available on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



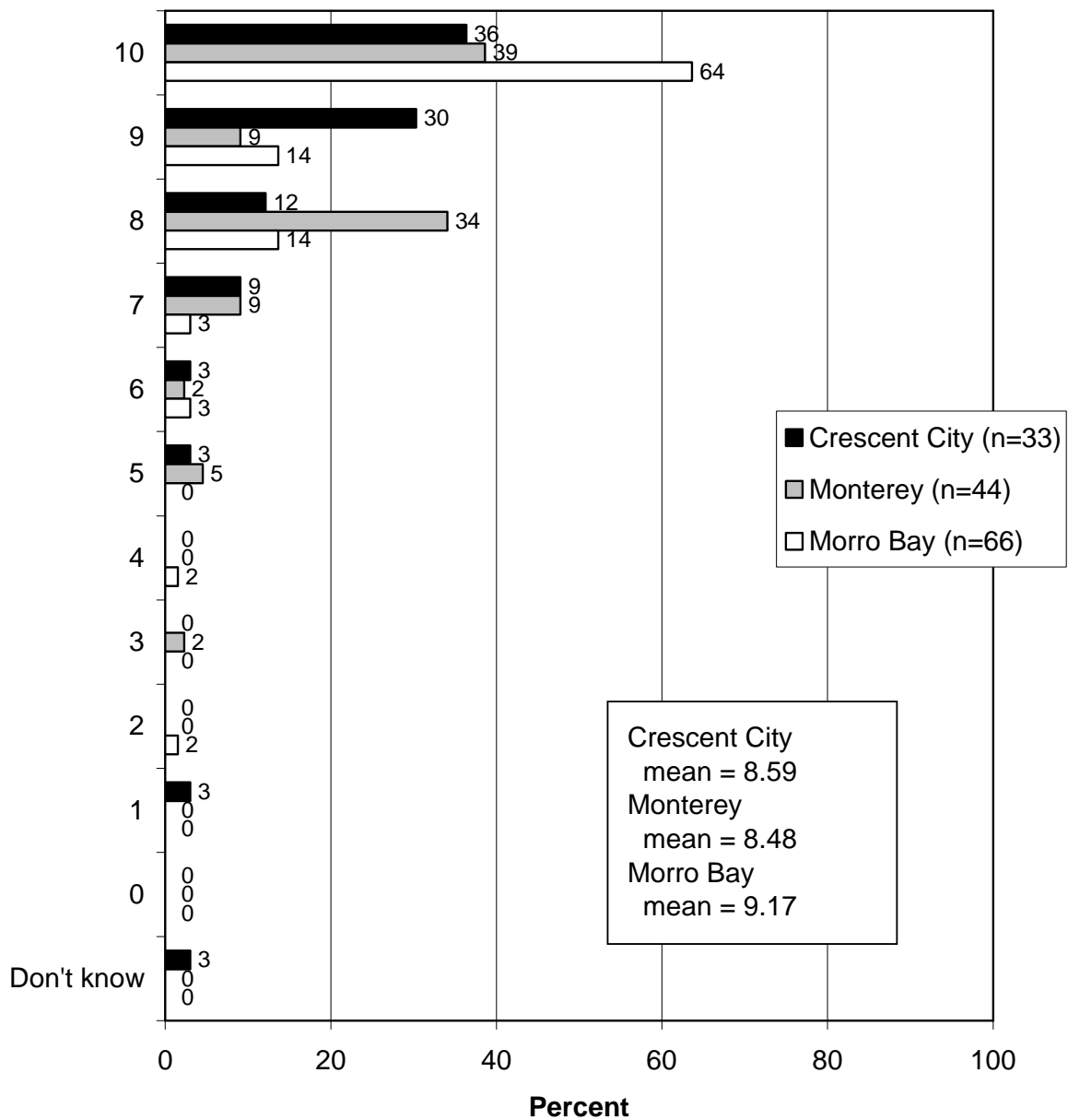
Q18. What about having local seafood available for purchase? (Please rate the importance of local seafood on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



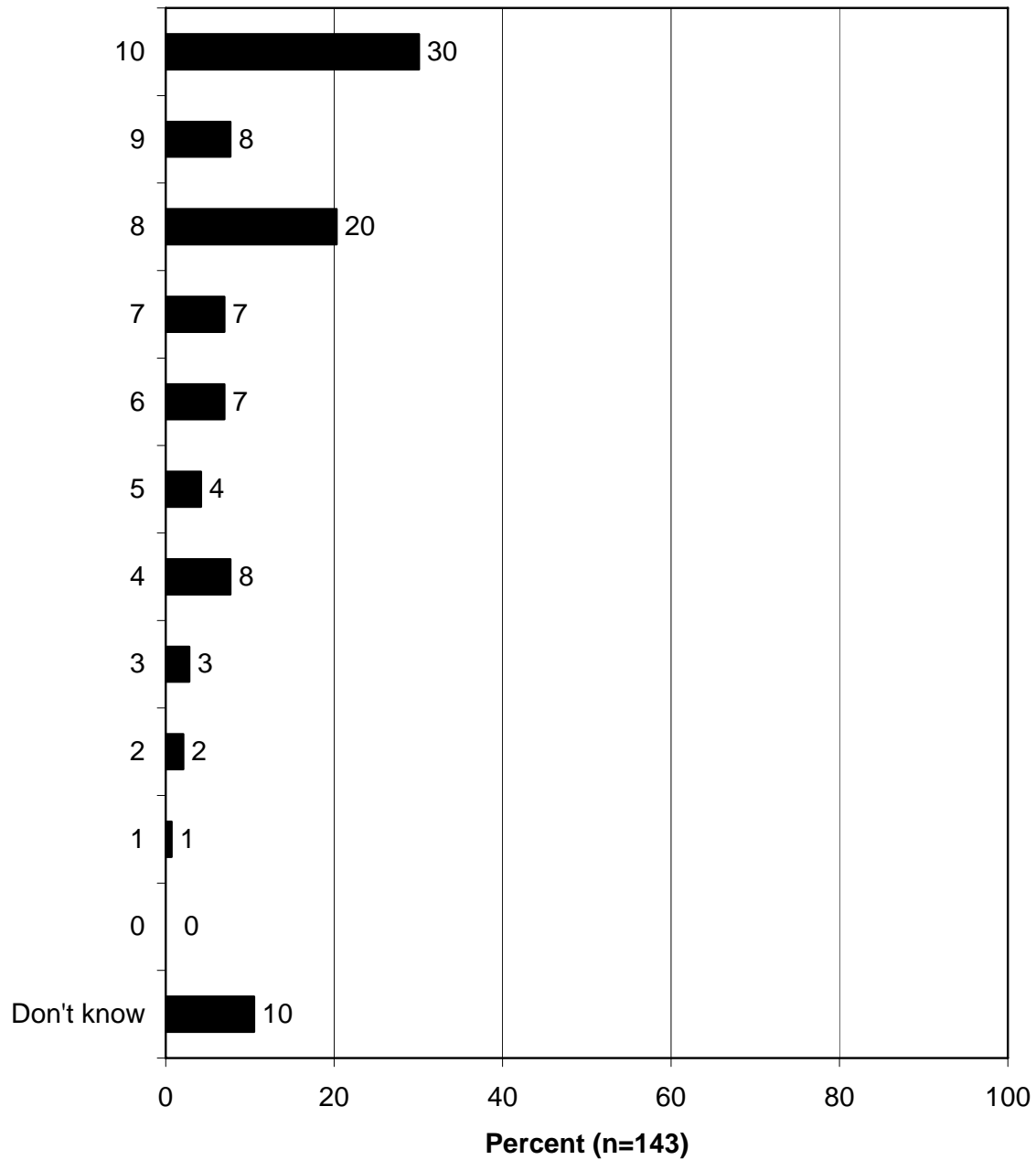
**Q19. What about the tourism generated by having the public be able to see a working waterfront?
(Please rate the importance of a working waterfront on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being ext)**



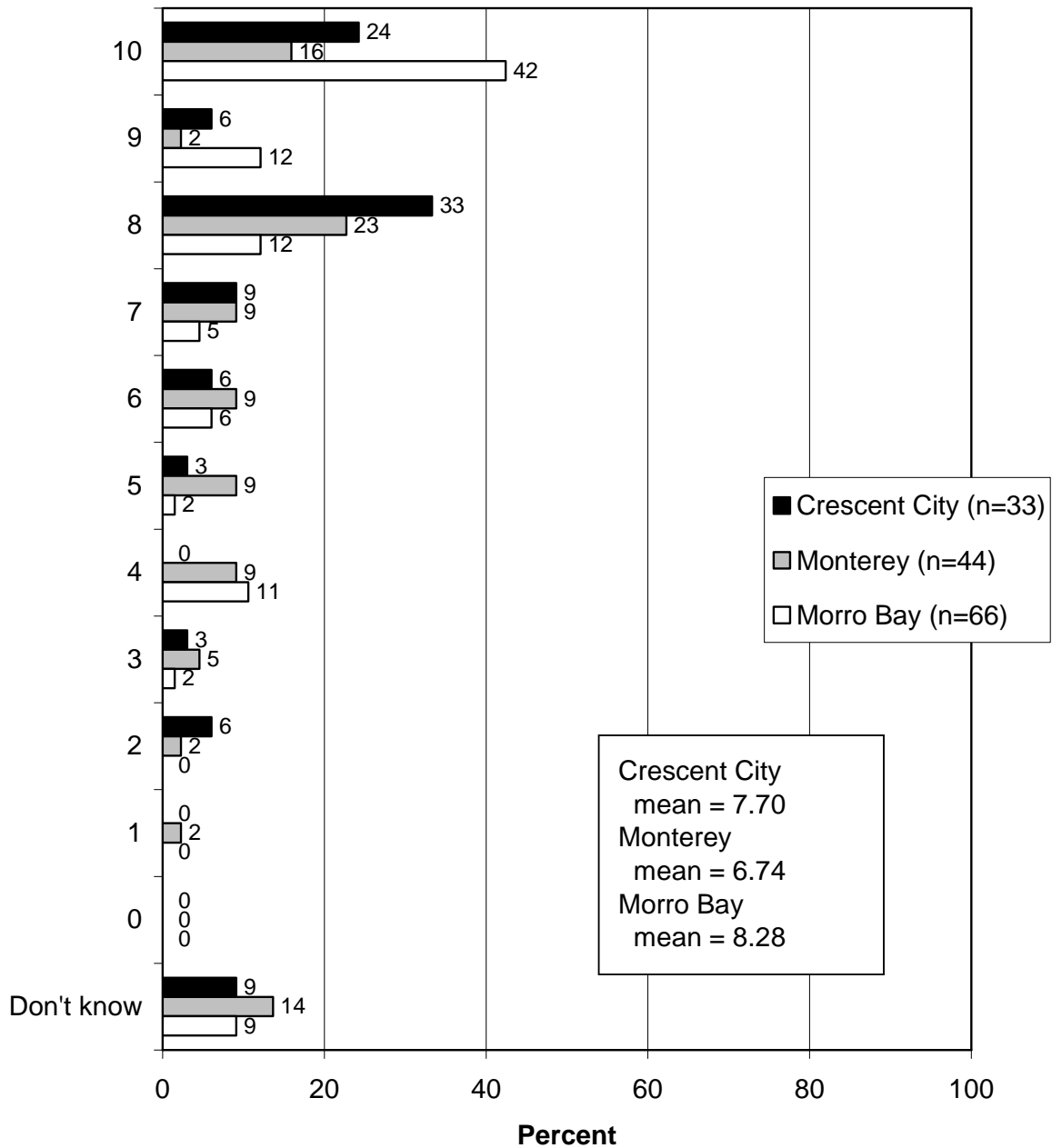
Q19. What about the tourism generated by having the public be able to see a working waterfront? (Rate the importance of a working waterfront on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



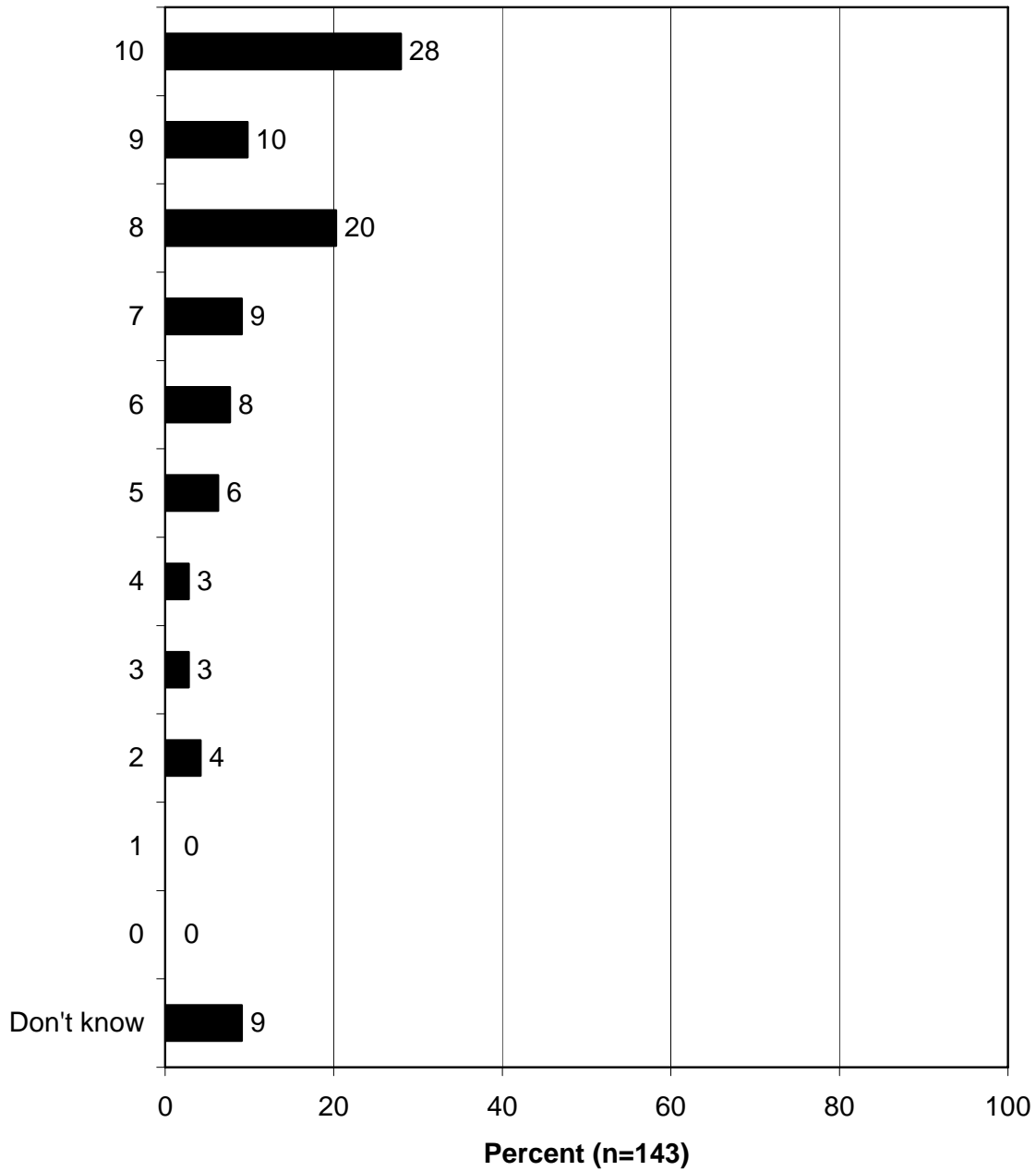
Q20. Please rate the importance of the actual number of jobs *directly* created by fishing activities on your community's economy.



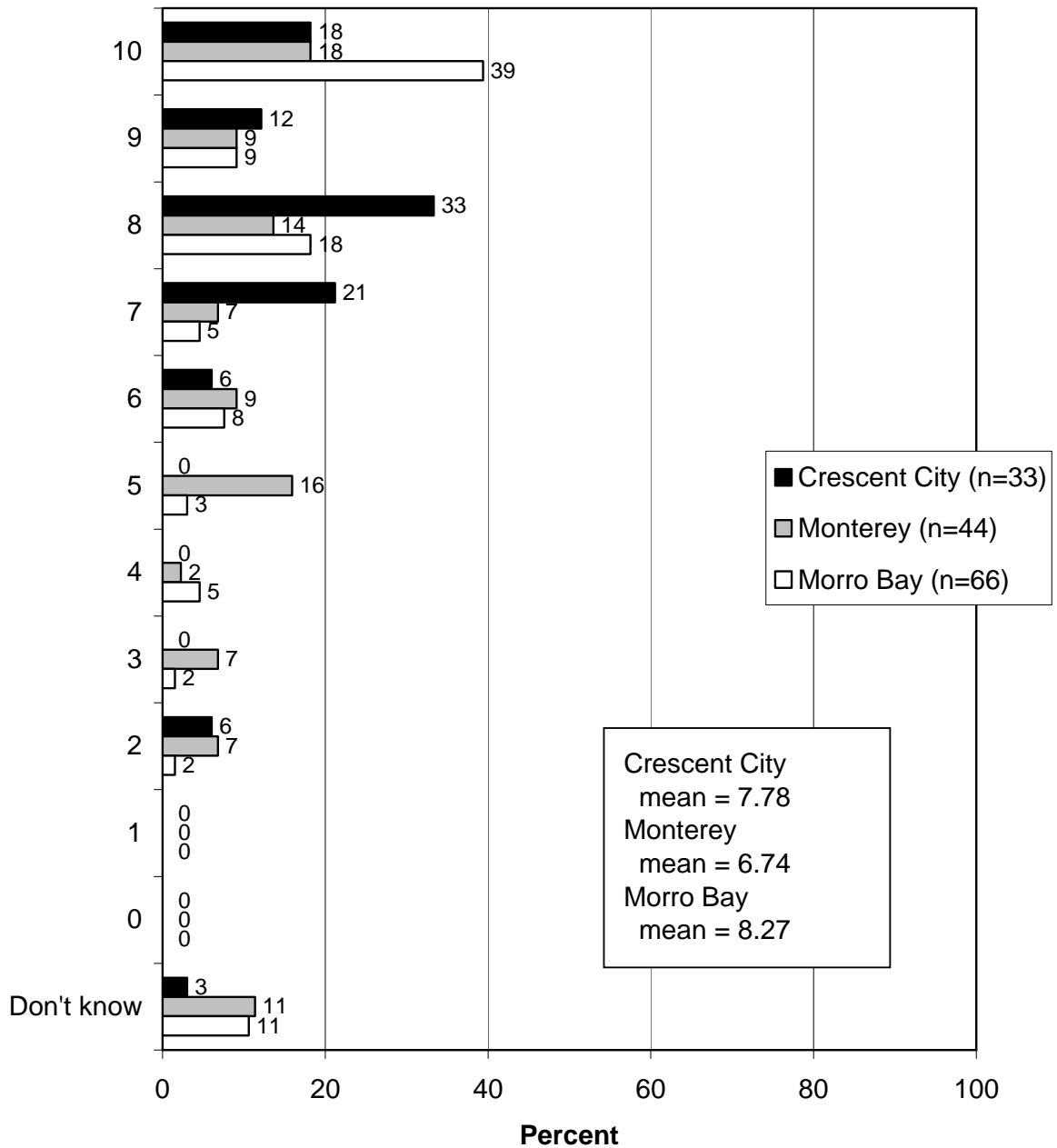
Q20. Please rate the importance of the actual number of jobs *directly* created by fishing activities on your community's economy.



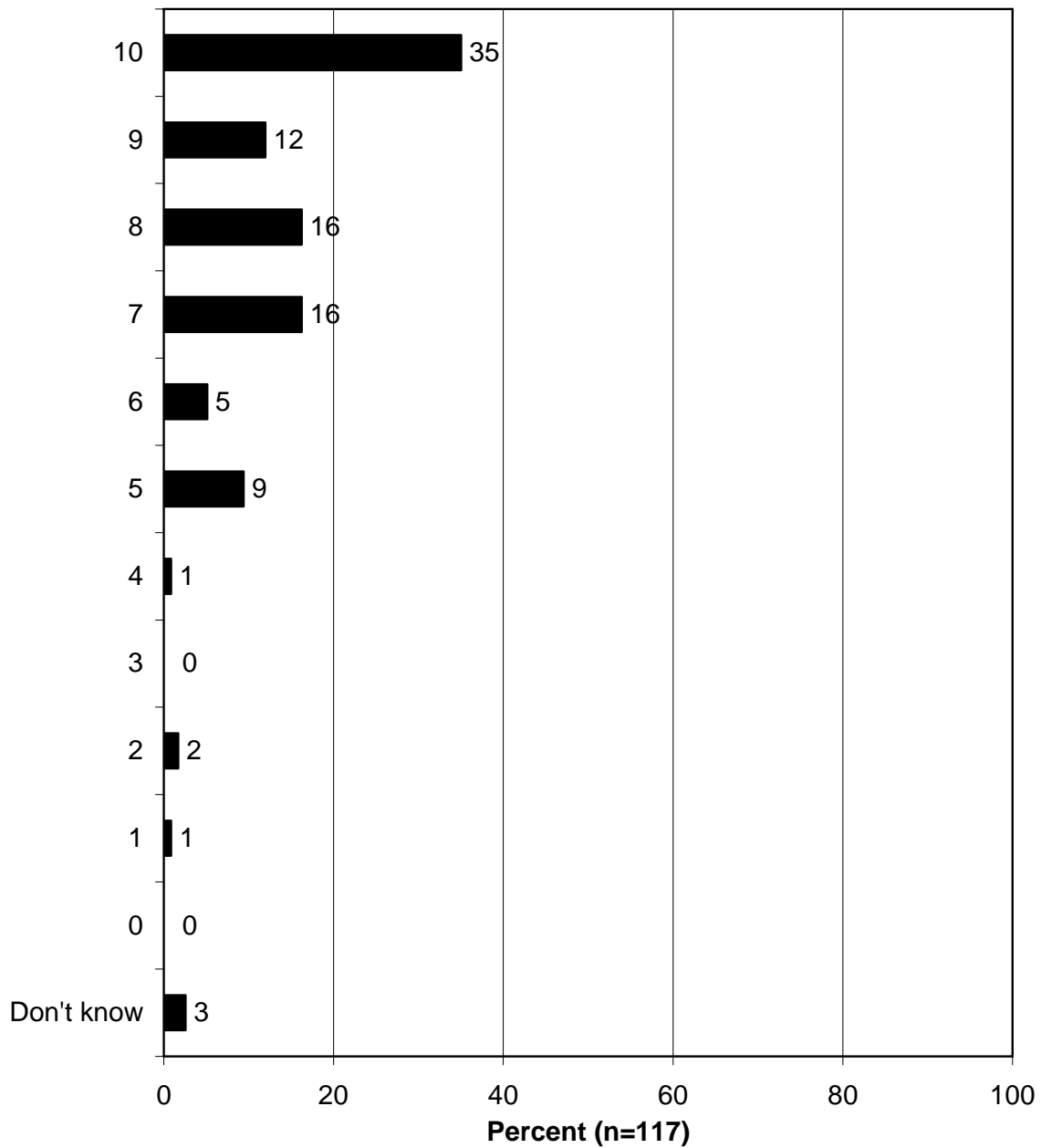
Q21. Please rate the importance of the actual number of jobs *indirectly* created by fishing activities on your community's economy.



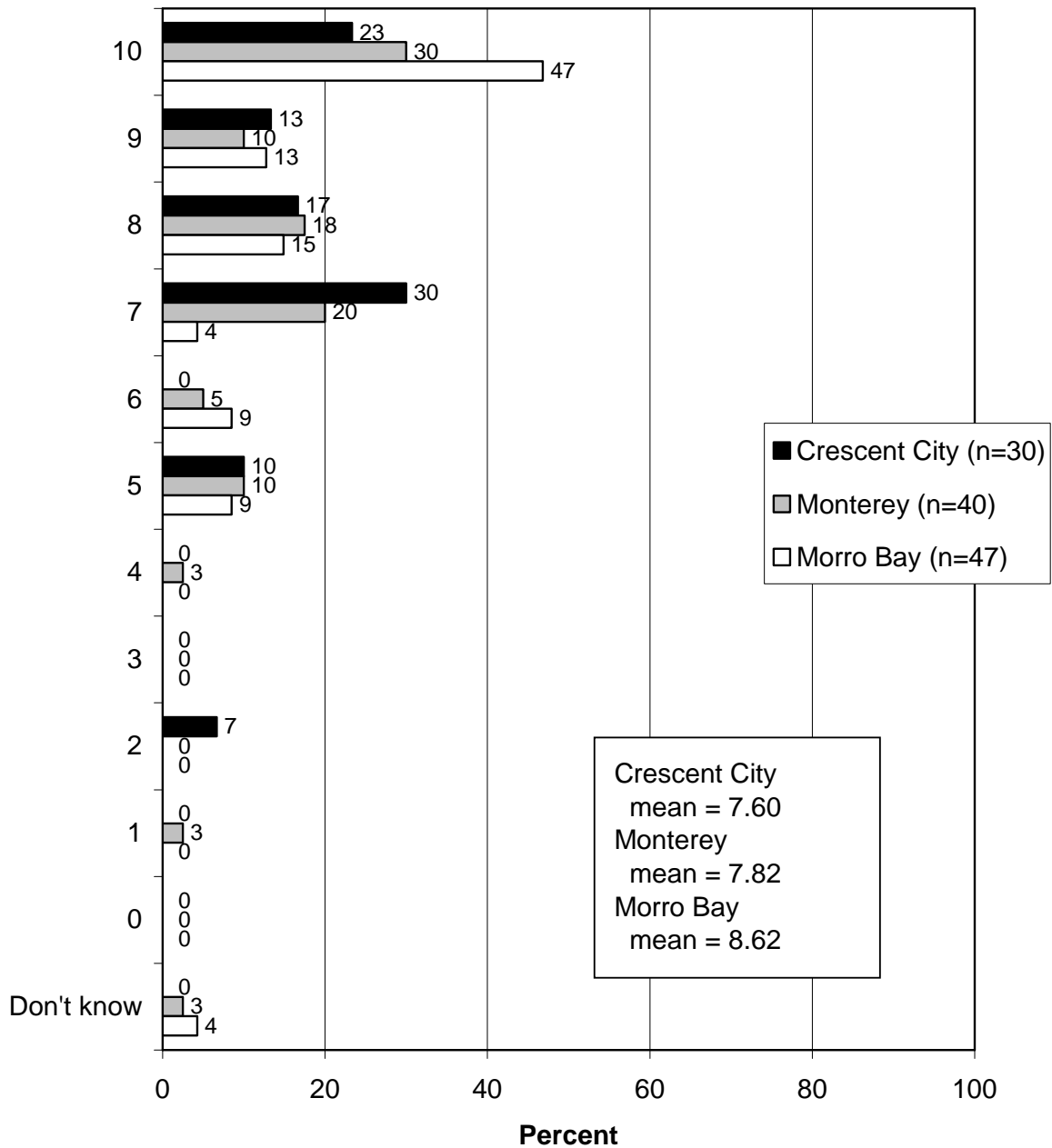
Q21. Please rate the importance of the actual number of jobs *indirectly* created by fishing activities on your community's economy.



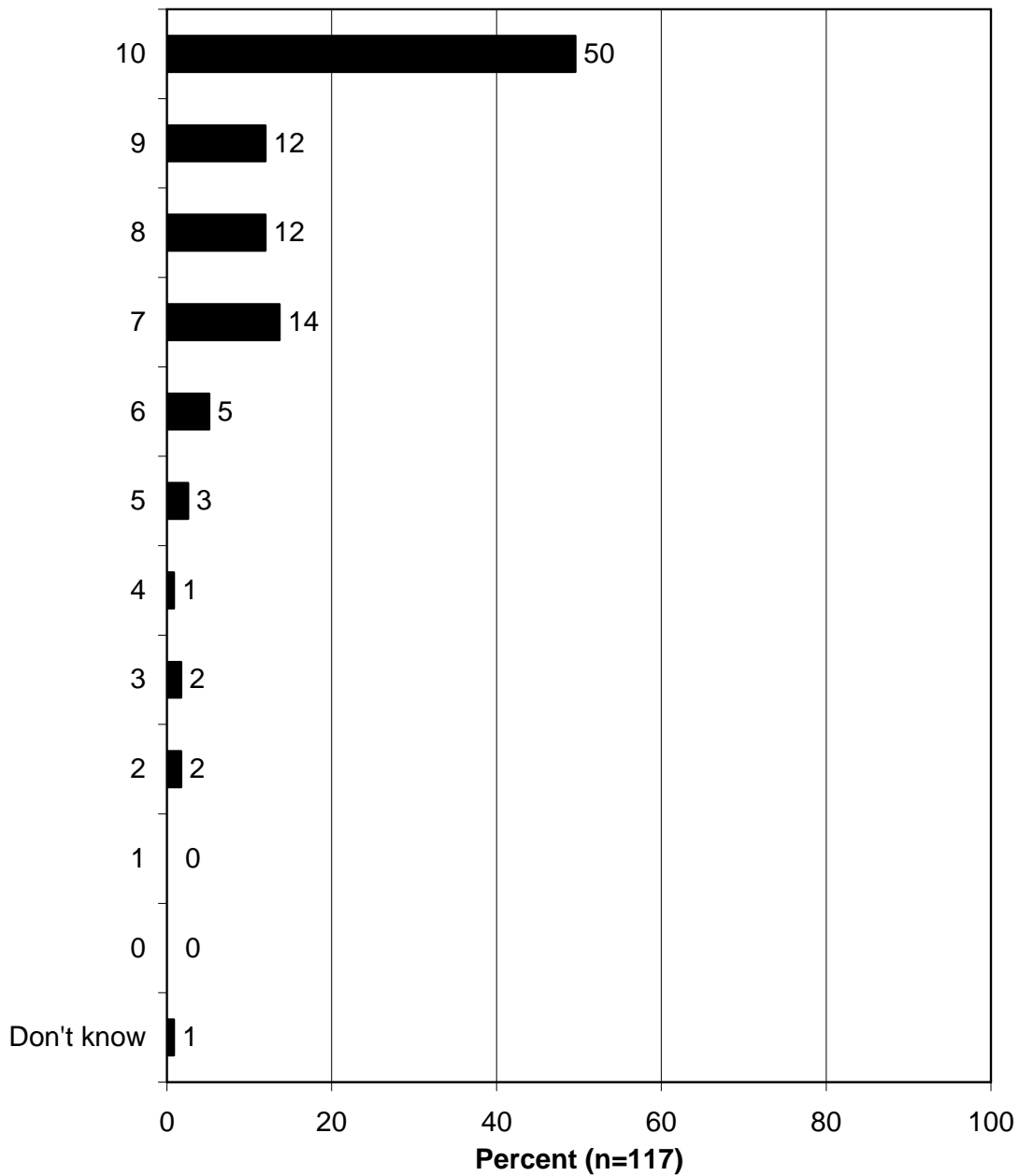
Q23. How important or unimportant is the fishing heritage of your community in attracting business to your community? (Asked of those whose organization works to attract business to their community.)



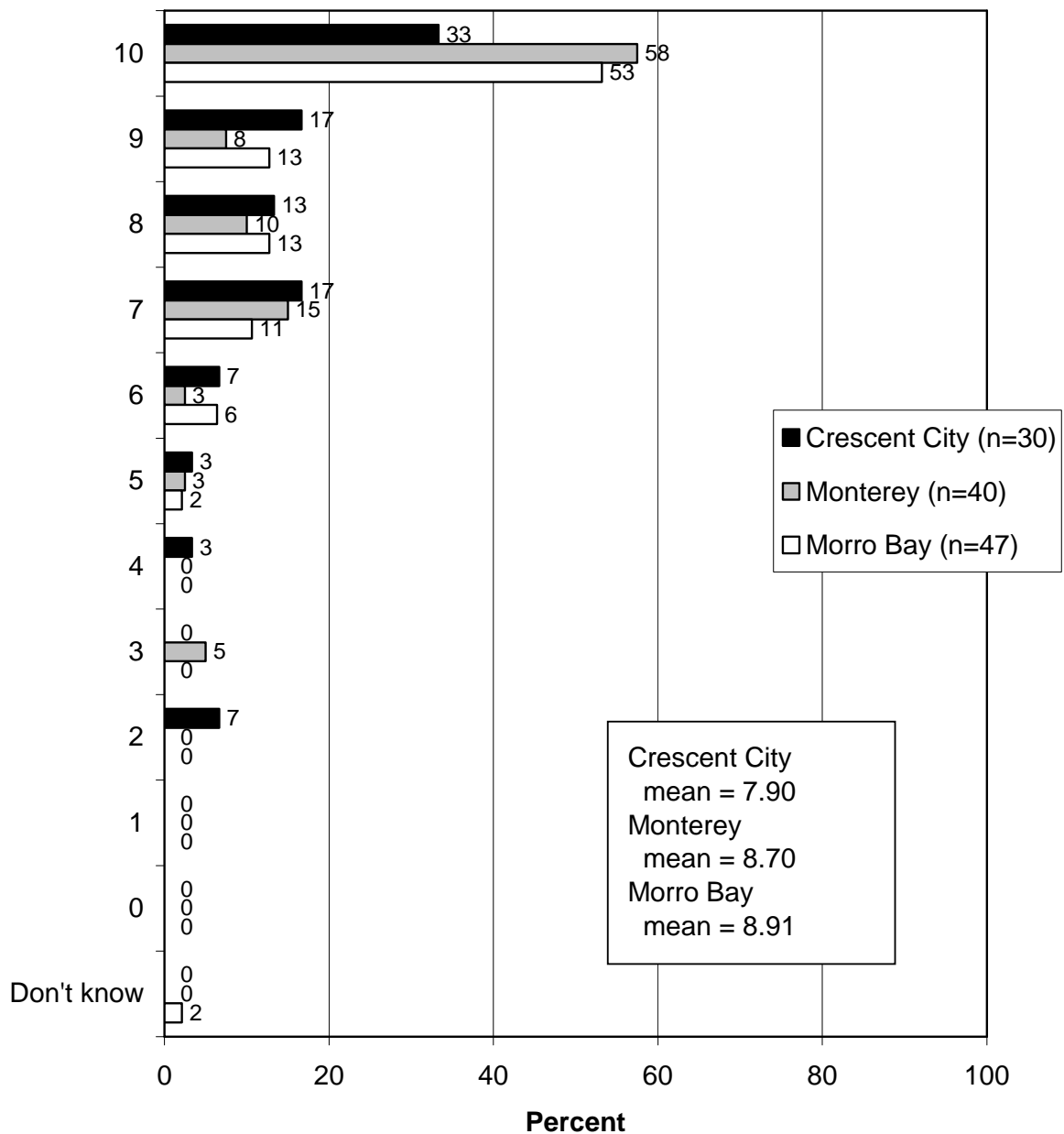
Q23. How important or unimportant is the fishing heritage of your community in attracting business to your community? (Asked of those whose organization works to attract business to their community.)



Q24. How important or unimportant is having local fresh seafood available in attracting business to your community? (Asked of those whose organization works to attract business to their community.)



Q24. How important or unimportant is having local fresh seafood available in attracting business to your community? (Asked of those whose organization works to attract business to their community.)

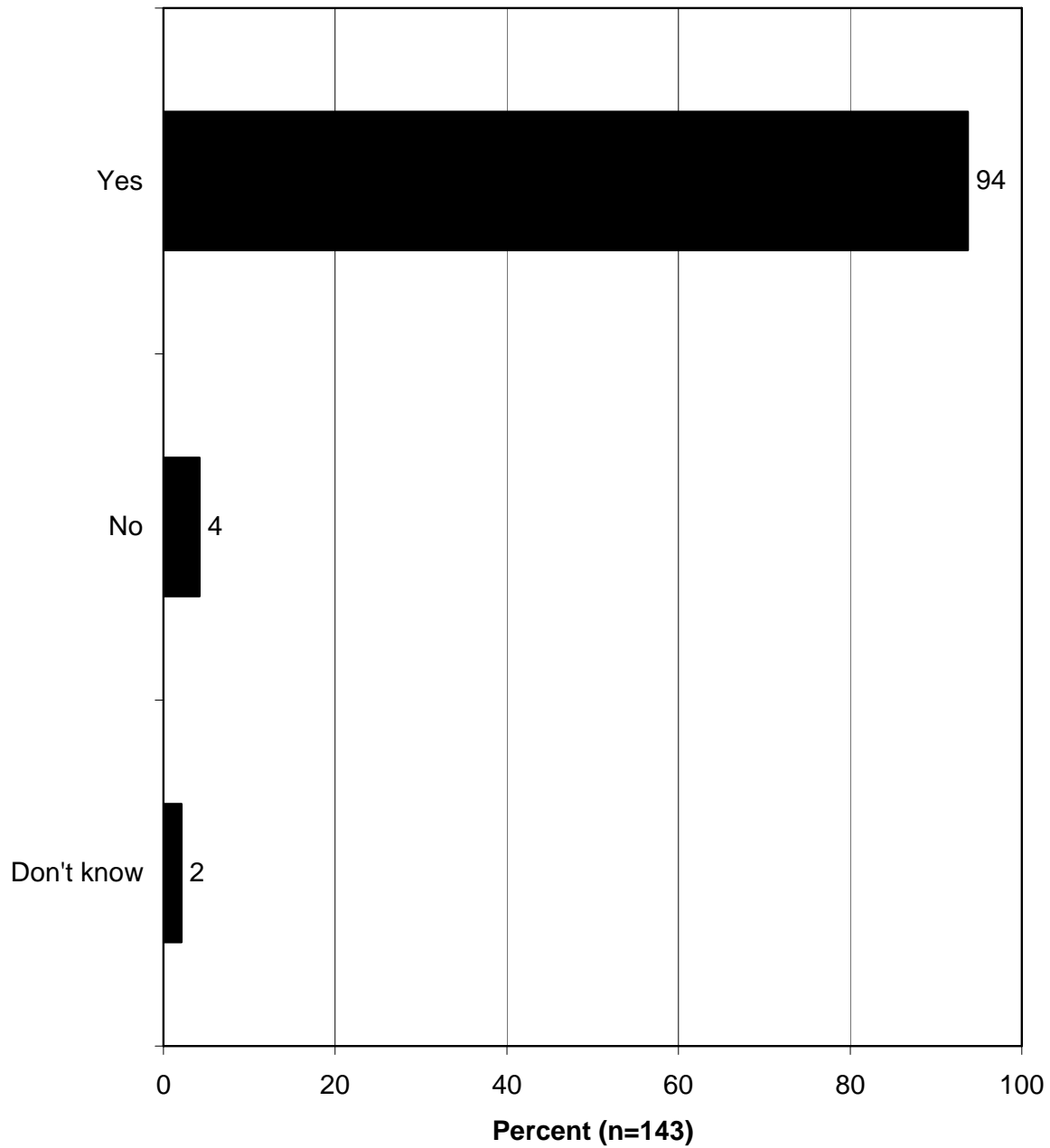


TOURISM AND BUSINESS INFORMATION

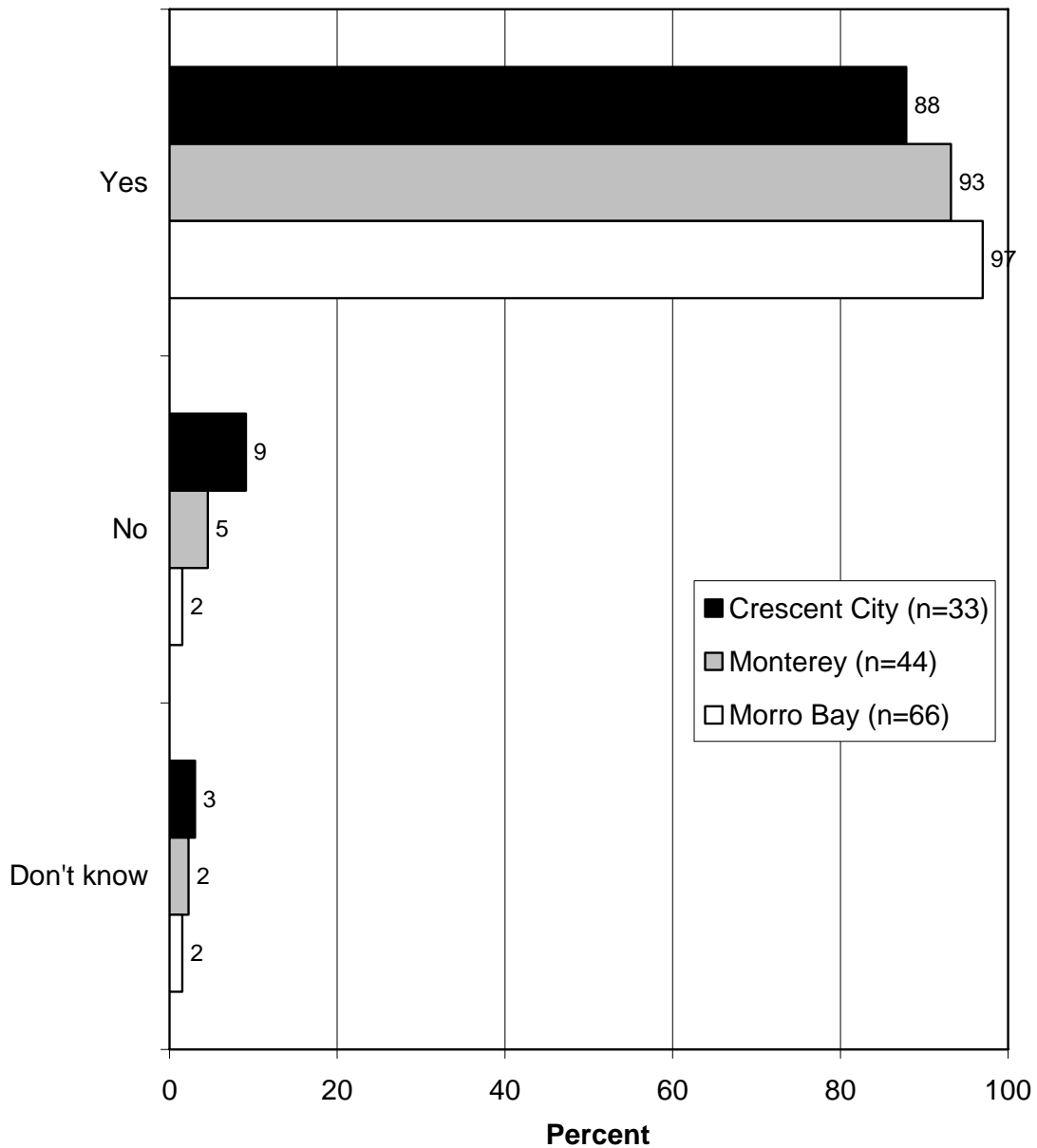
- Tourism professionals and civic leaders appear to be well informed of various media promoting their local community. An overwhelming majority of tourism professionals and civic leaders (94%) are aware of brochures or websites that promote tourism and business in the Crescent City area, Monterey Peninsula, or Morro Bay area. Only 4% indicate that they are unaware of brochures or websites promoting tourism in their community.
 - Marketing and advertising directed toward visitors and potential business appears to feature the community's fishing heritage. When asked if the brochures or websites that they had seen feature photographs of fishing activities or fishing boats, 74% of all professionals and civic leaders indicate that they do; only 9% report that the brochures or websites do not feature photographs of fishing activities or fishing boats.

- The local Chamber of Commerce is most often identified as a source of information for California's coastal communities. Over half of tourism professionals and civic leaders (66%) list the Chamber of Commerce as the source sponsoring brochures and websites promoting tourism and business in their community. All other sources are identified by less than half of the respondents; these include government agencies, visitor's centers, local organizations, tourist attractions, and hospitality businesses.

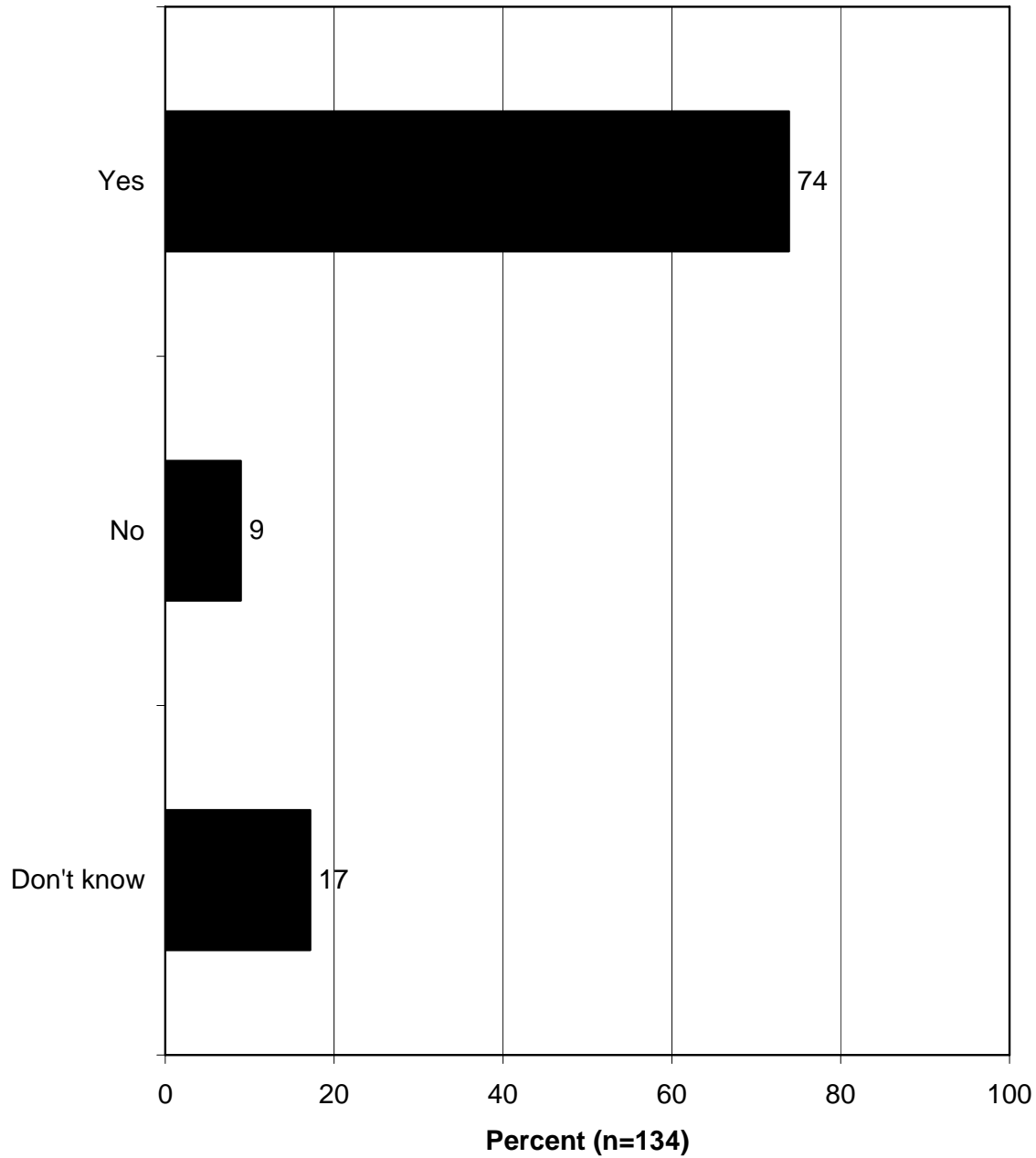
Q26. Are you aware of any brochures or websites that promote tourism and business in the Monterey Peninsula / Morro Bay area / Crescent City area?



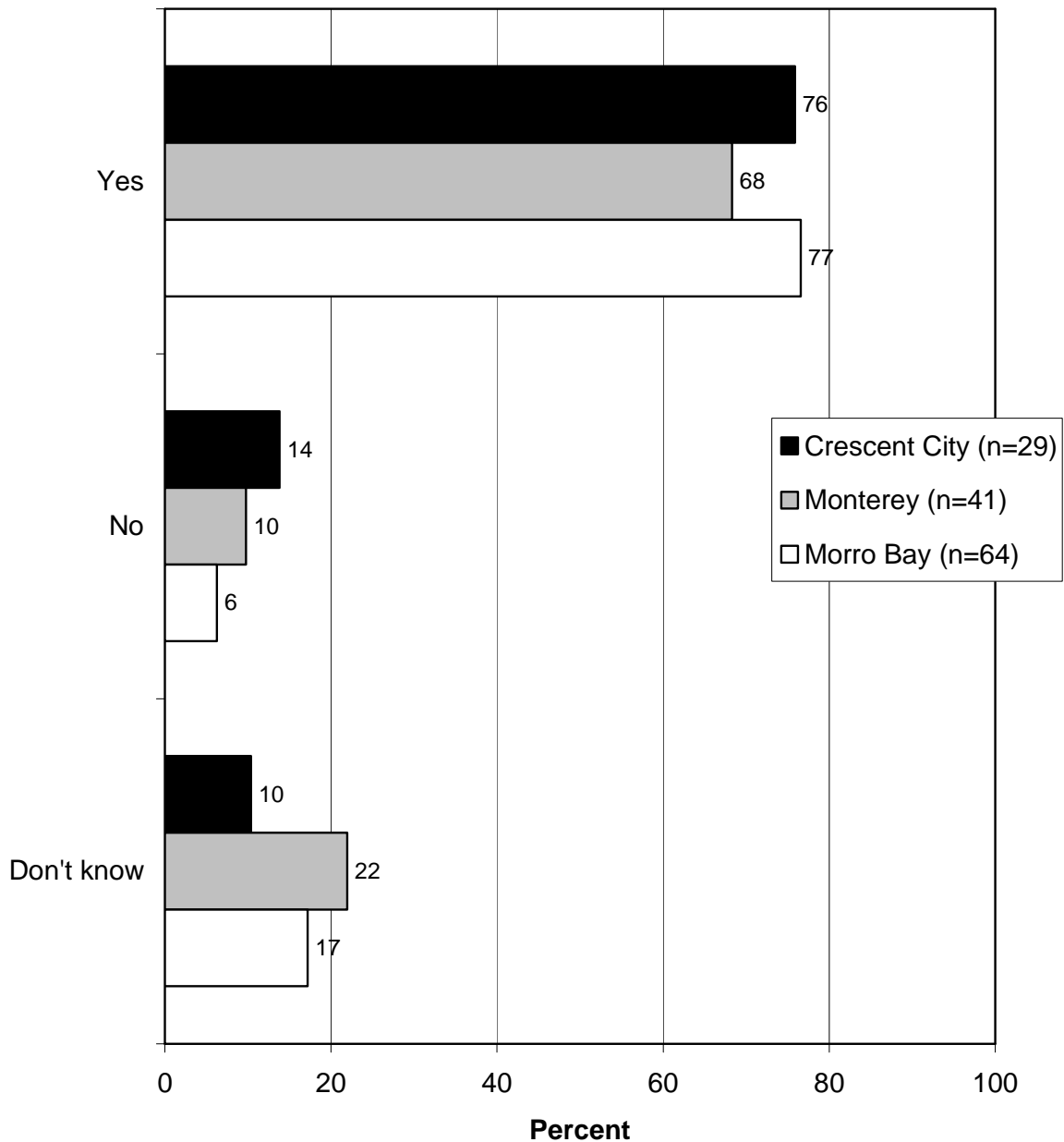
**Q26. Are you aware of any brochures or websites that promote tourism and business in the Monterey Peninsula / Morro Bay area / Crescent City area?
(Each respondent was asked only about his or her community.)**



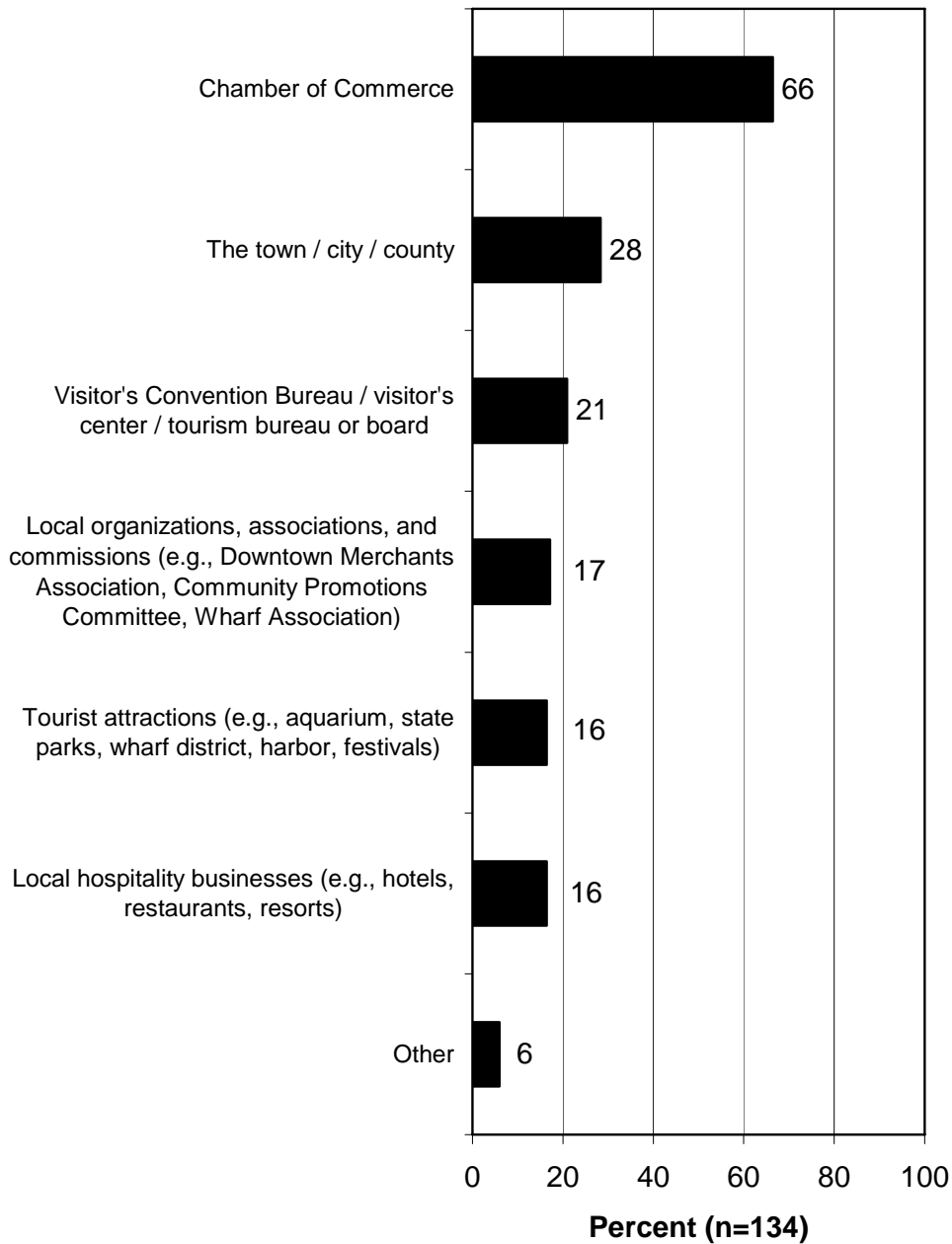
Q28. Do any of the brochures or websites feature fishing photos or fishing boats? (Asked of those who expressed awareness of brochures or websites that promote tourism and business in their community.)



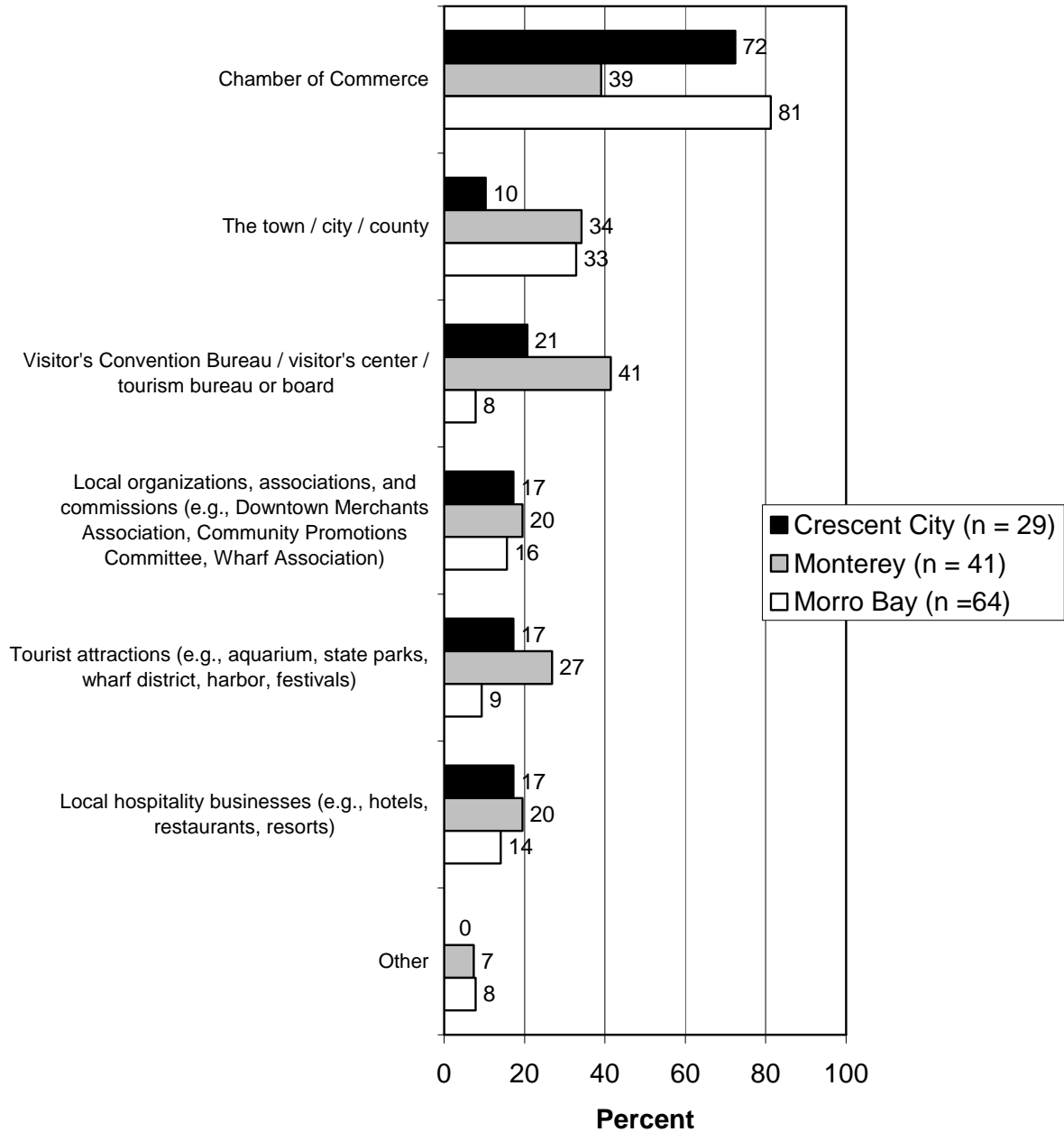
Q28. Do any of the brochures or websites feature fishing photos or fishing boats? (Asked of those who expressed awareness of brochures or websites that promote tourism and business in their community.)



**Q27. Who sponsored the brochures or websites?
 (Asked of those who expressed awareness of
 brochures or websites that promote tourism and
 business in their community.)**



**Q27. Who sponsored the brochures or websites?
(Asked of those who expressed awareness of
brochures or websites that promote tourism and
business in their community.)**

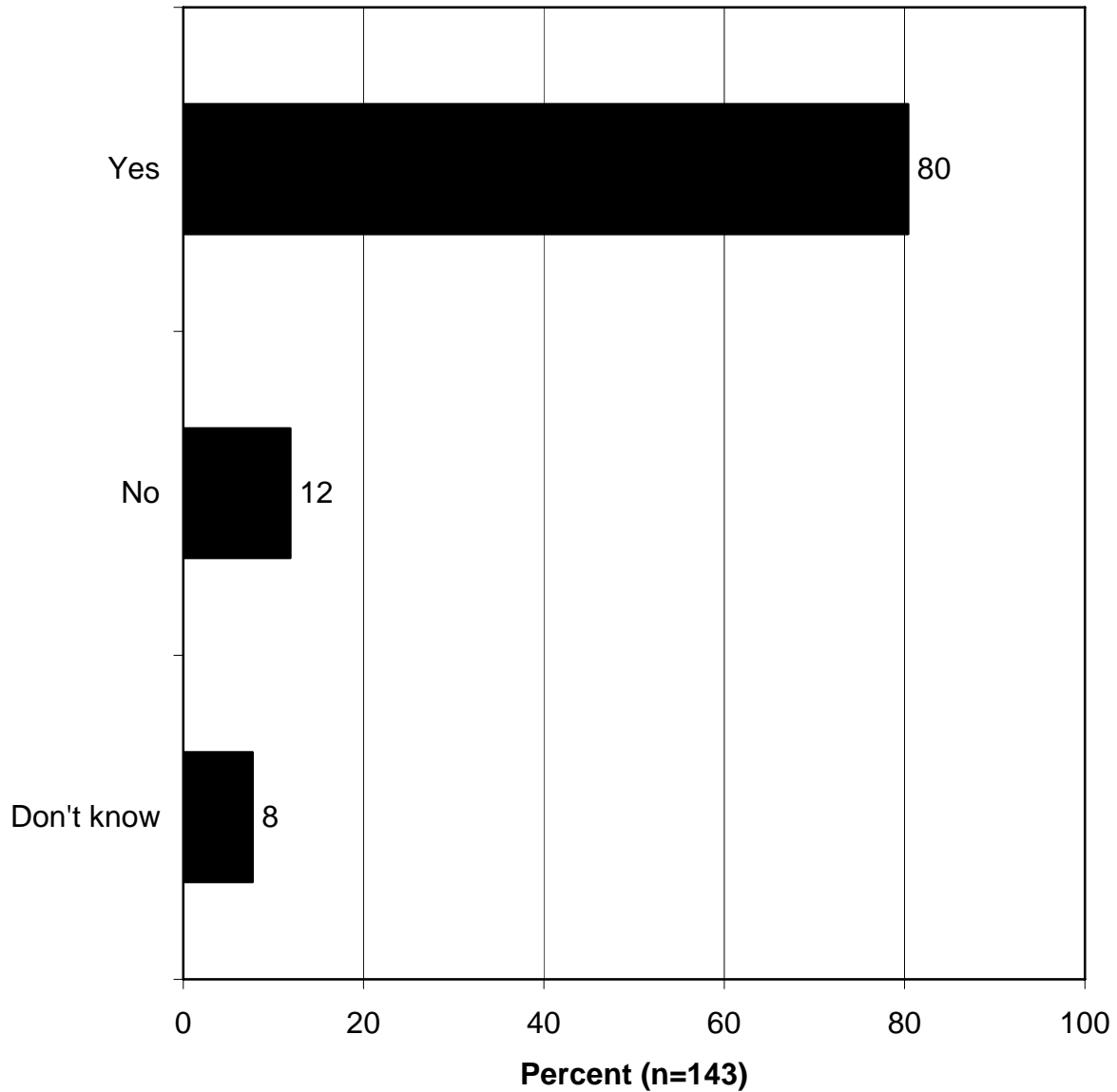


APPRECIATION AND PRESERVATION OF CULTURAL IDENTITY BY LOCAL GOVERNMENTS

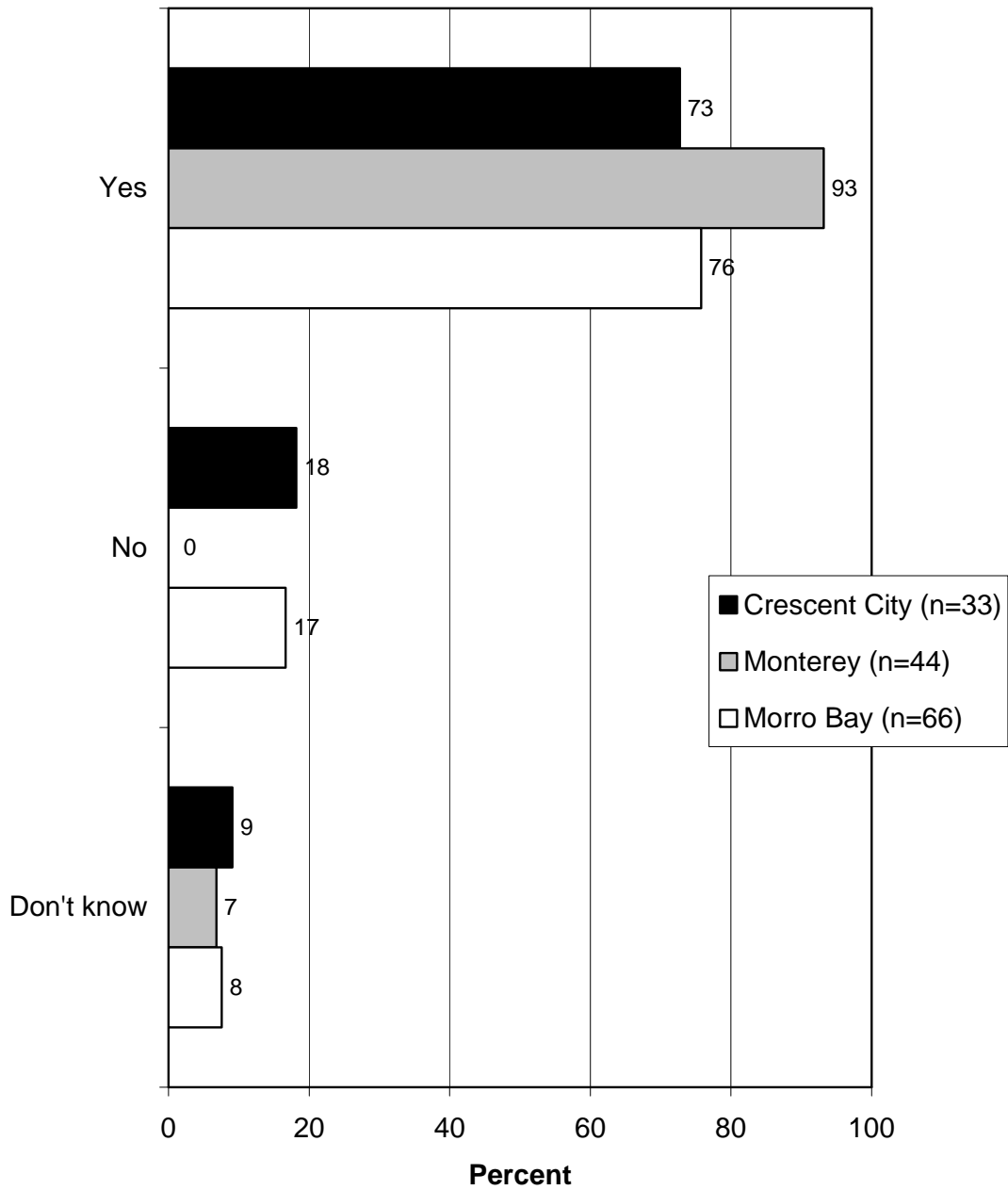
- Overall, 80% of tourism professionals and civic leaders believe that their community government appreciates its cultural resources. Only 12% do not believe that their community government appreciates its cultural resources.
 - Monterey respondents appears to have the greatest confidence in their community government's appreciation of its cultural resources, with 93% of respondents reporting that local government appreciates its cultural resources; no Monterey Peninsula respondents indicated that their government does not appreciate the community's cultural resources.
 - A majority of professionals and civic leaders in both Crescent City and Morro Bay (73% and 76%, respectively) indicate that their community's government appreciates its cultural resources; at the same time, 18% and 17%, respectively, believe that their community's government does *not* appreciate its cultural resources.

- Likewise, 74% of tourism professionals and civic leaders believe that their community's government works to preserve its cultural identity; 20% do *not* believe that their community's government works to preserve cultural identity.
 - Again, Monterey respondents have greater confidence in their community's government, with 89% of respondents agreeing that the community government works to preserve cultural identity; nevertheless, 11% indicate that the government does not.
 - In Crescent City, 79% of professionals and civic leaders indicate that their government works to preserve its cultural identity, while 18% believe that their government does not.
 - In Morro Bay, 62% of professionals and civic leaders believe that their community's government works to preserve its cultural identity, but 26% think their government does not.

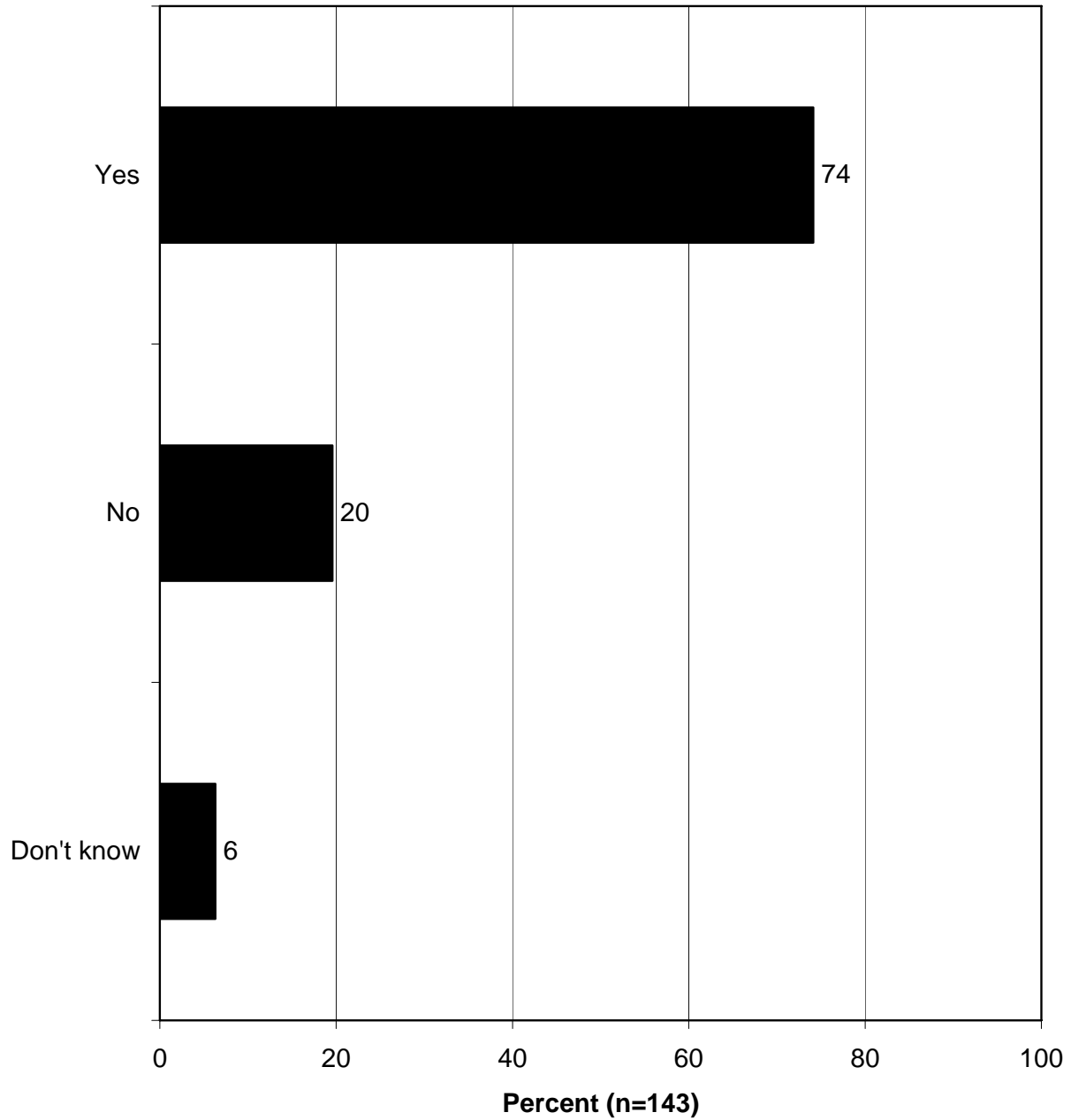
Q30. Do you think your community government appreciates its cultural resources?



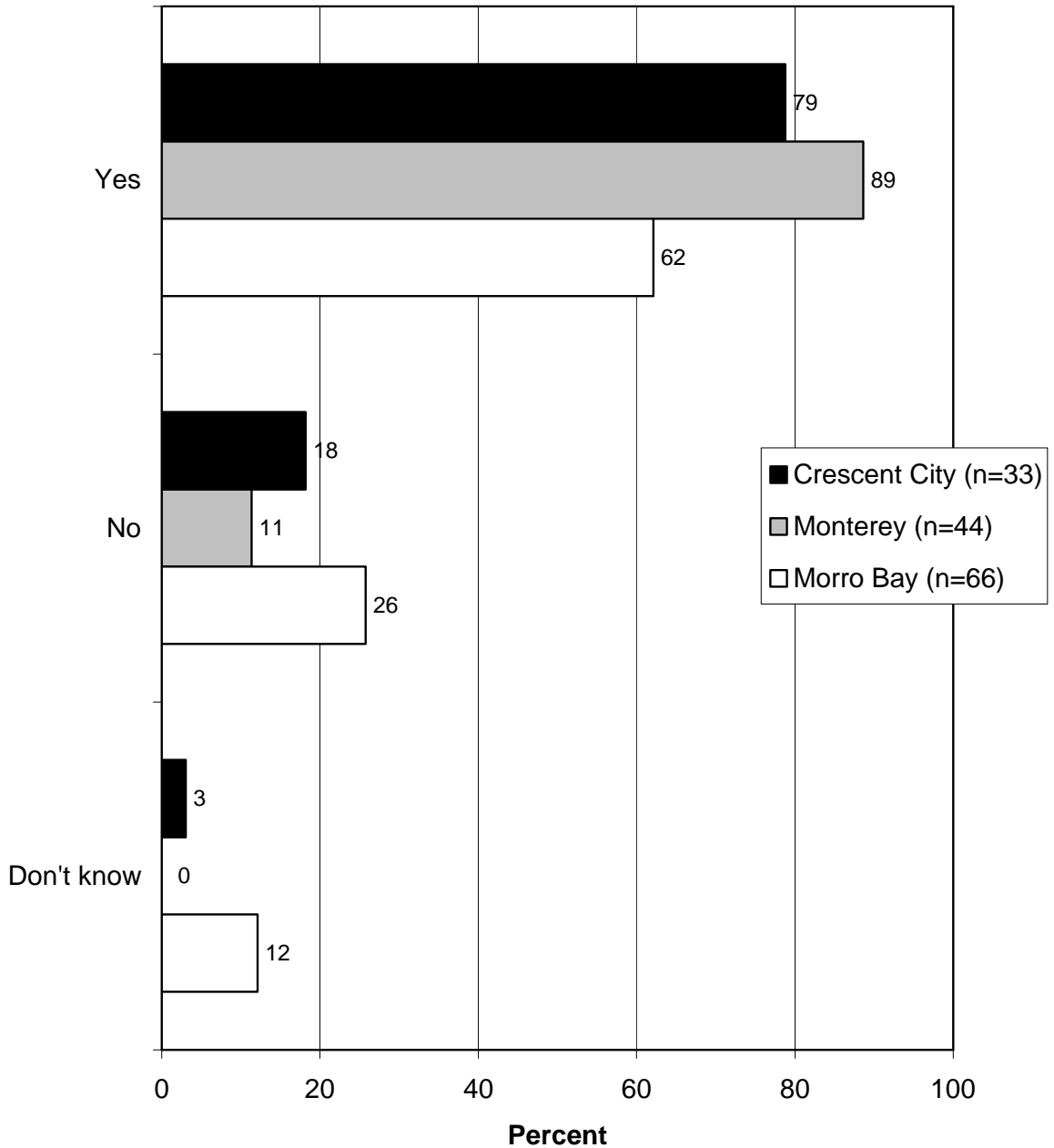
Q30. Do you think your community government appreciates its cultural resources?



Q31. Does your community government work to preserve its cultural identity?



Q31. Does your community government work to preserve its cultural identity?

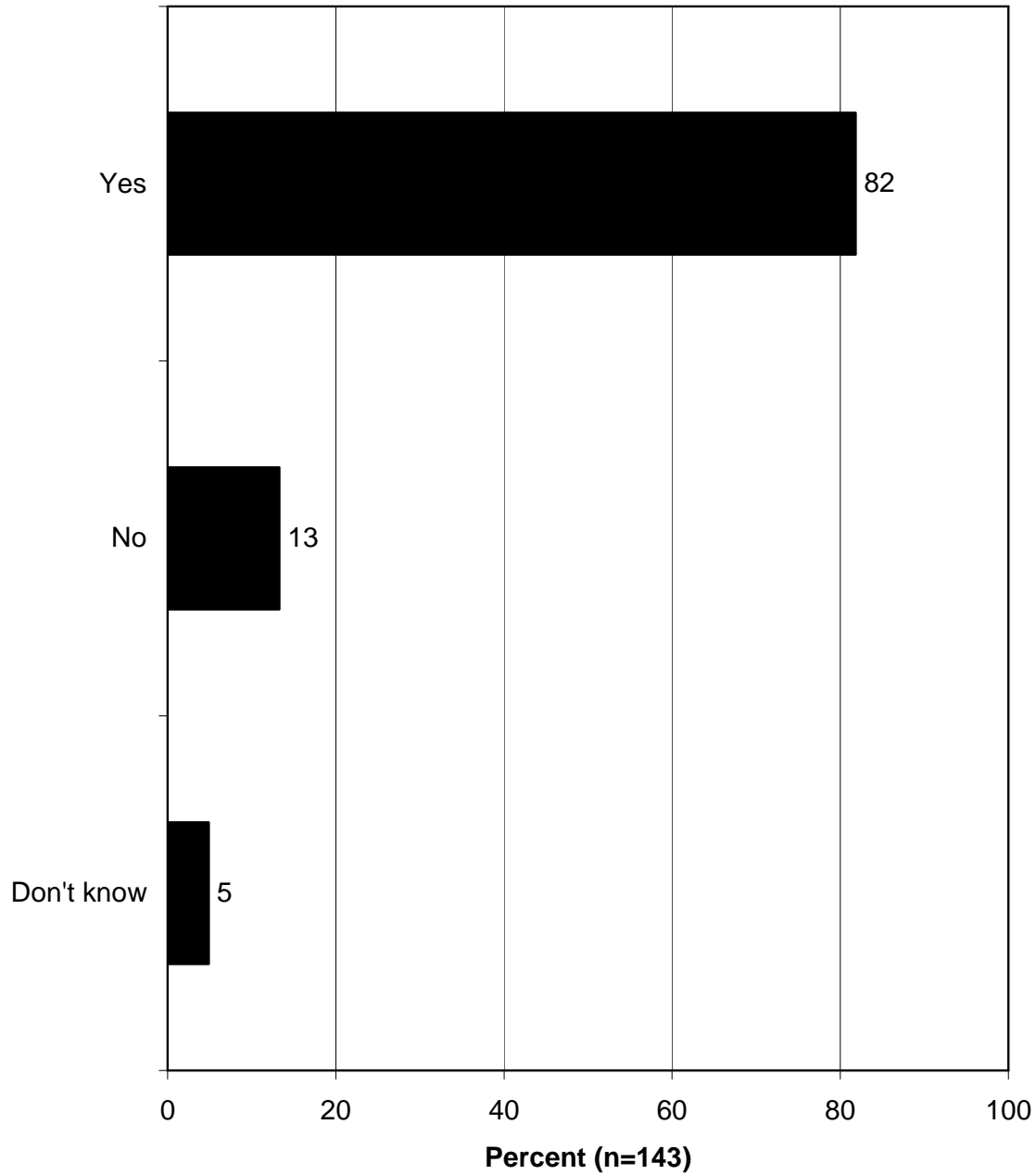


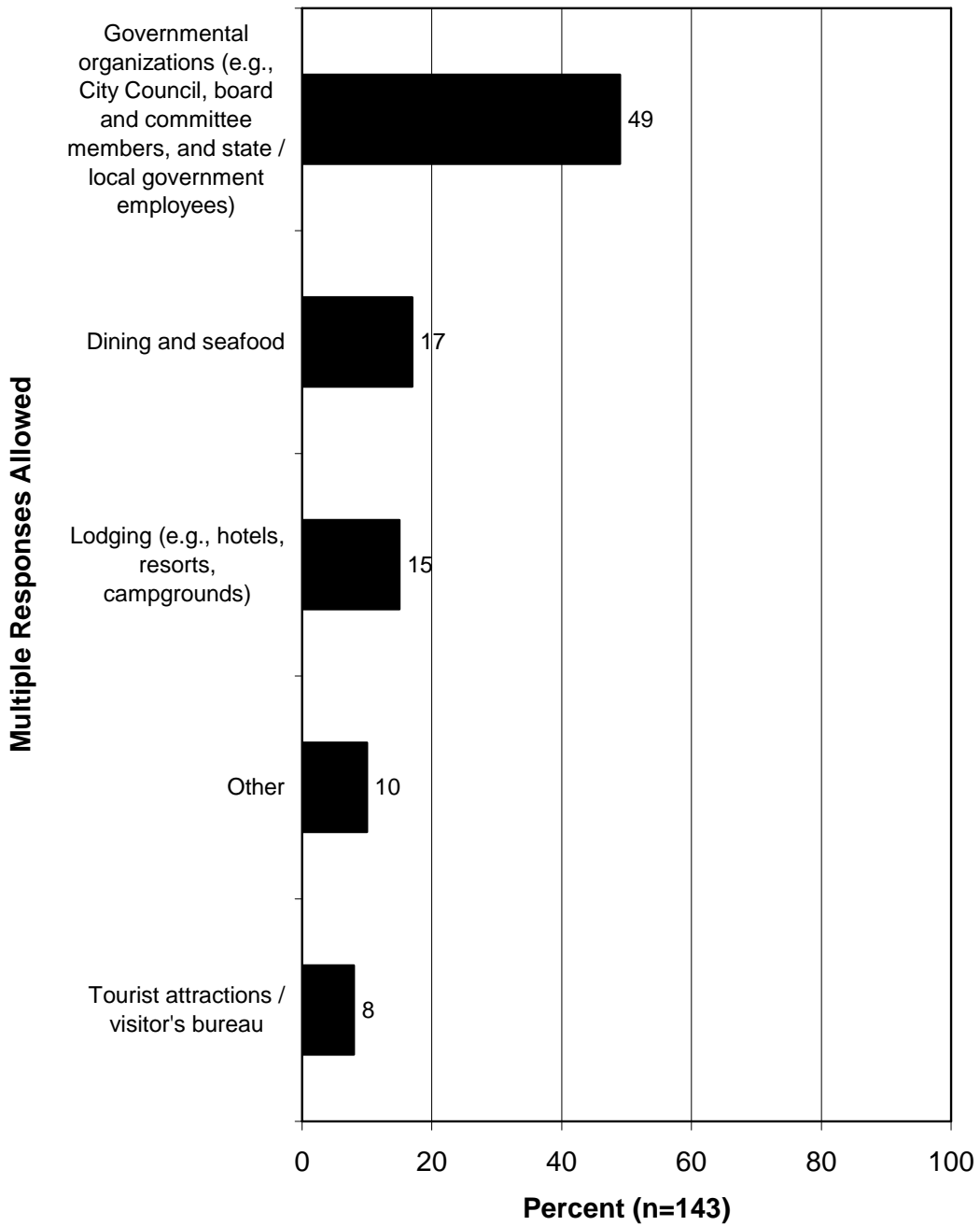
ORGANIZATIONAL INFORMATION

- The vast majority of all tourism professionals and civic leaders surveyed (82%) belong to an organization that works to attract business to their local community.
 - A graph shows the aspects of tourism on which the organizations focused.

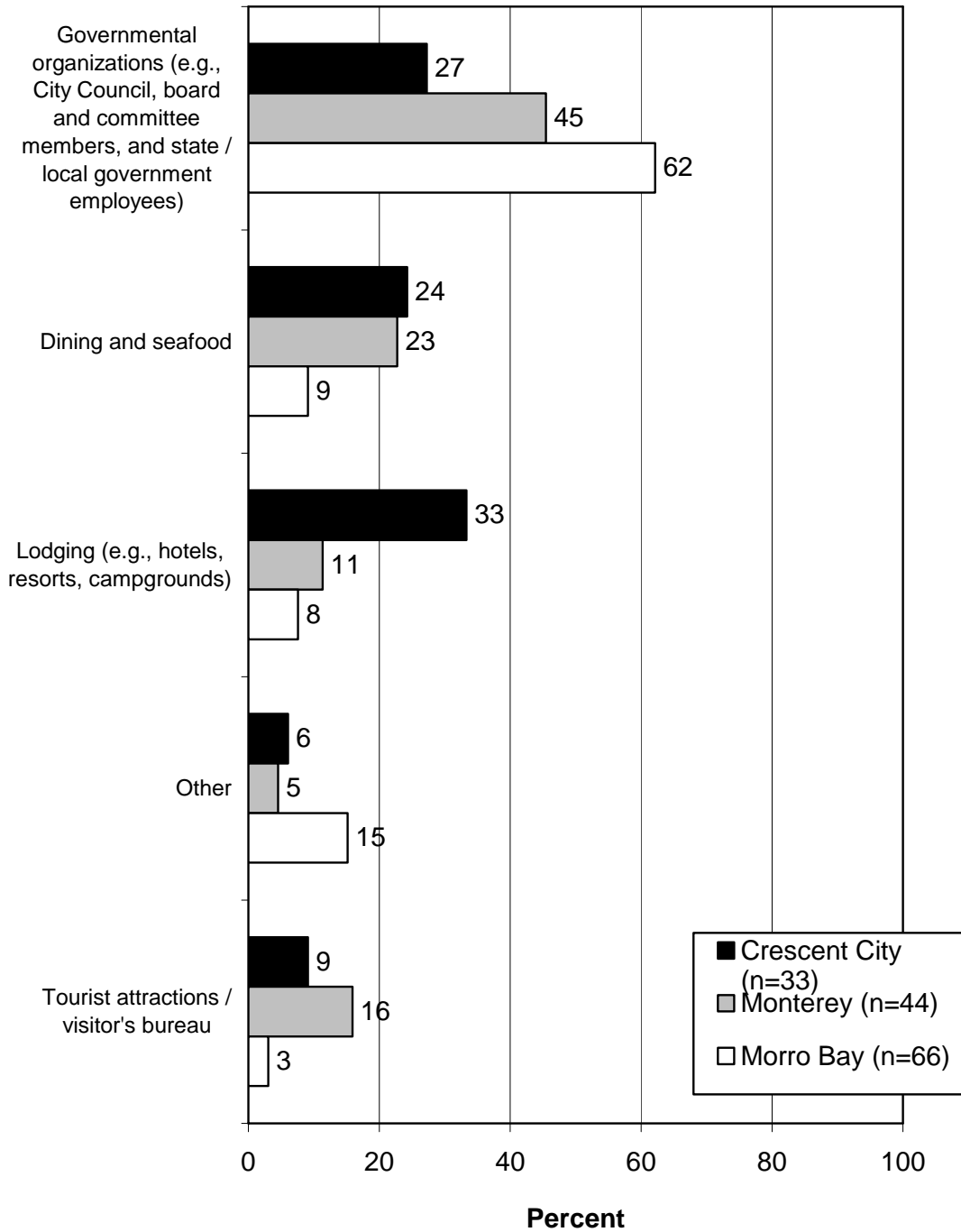
- The distribution between tourism professionals and civic leaders in the survey was balanced to ensure representation of both civic and business professionals: 49% of those interviewed in the professional survey were identified as community leaders, city officials, or community directors; the remaining respondents were categorized as restaurateurs, hoteliers, tourist attraction managers, visitor's bureau employees, and other miscellaneous.

Q22. Does your organization work to attract business to your community, such as by promoting tourism or increasing sales of local products of any kind?



Q32. Organization type.

Q32. Organization type.



VISITOR SURVEY RESULTS

VISITATION TO CRESCENT CITY, MONTEREY, AND MORRO BAY

Restaurant Visits in Crescent City, Monterey, and Morro Bay

- Overwhelming majorities of visitors to each of the three communities went to a restaurant while there: 87% of Crescent City visitors, 93% of Monterey visitors, and 92% of Morro Bay visitors. Additionally, a large majority of visitors to Crescent City (55%) ate seafood in a restaurant when visiting that community, and very large majorities of visitors to Monterey (81%) and Morro Bay (85%) ate seafood in a restaurant when visiting those communities.
 - The large majority of those who went to a restaurant in one of the three communities visited more than one restaurant in the community in the past 2 years, particularly Monterey and Morro Bay visitors: 74% of Crescent City visitors, 95% of Monterey visitors, and 93% of Morro Bay visitors went to more than one restaurant (among those who visited a restaurant).
 - Graphs show the restaurants patronized by visitors to the communities (the survey asked them to name the last restaurant they visited). Note the predominance of non-chain/non-franchised restaurants, particularly in Monterey and Morro Bay. Unfortunately, large percentages could not name the last restaurant they visited.

- The survey asked about the importance that people had placed on being able to go to a good restaurant in their decision to visit Crescent City, Monterey, or Morro Bay. Overwhelming majorities of visitors to the communities said that being able to go to a good restaurant was important—with most of those responses being *very* important—in their decision to visit those communities: 75% of Crescent City visitors, 92% of Monterey visitors, and 91% of Morro Bay visitors.

- Very large majorities of visitors to the three communities agree that, in general, they sometimes seek out restaurants specifically for seafood: 75% of Crescent City visitors, 80% of Monterey visitors, and 77% of Morro Bay visitors. When asked about seeking restaurants *in Crescent City, Monterey, or Morro Bay* (as opposed to any location in general) for seafood, lower percentages, but still majorities in Monterey and Morro Bay, agree that they

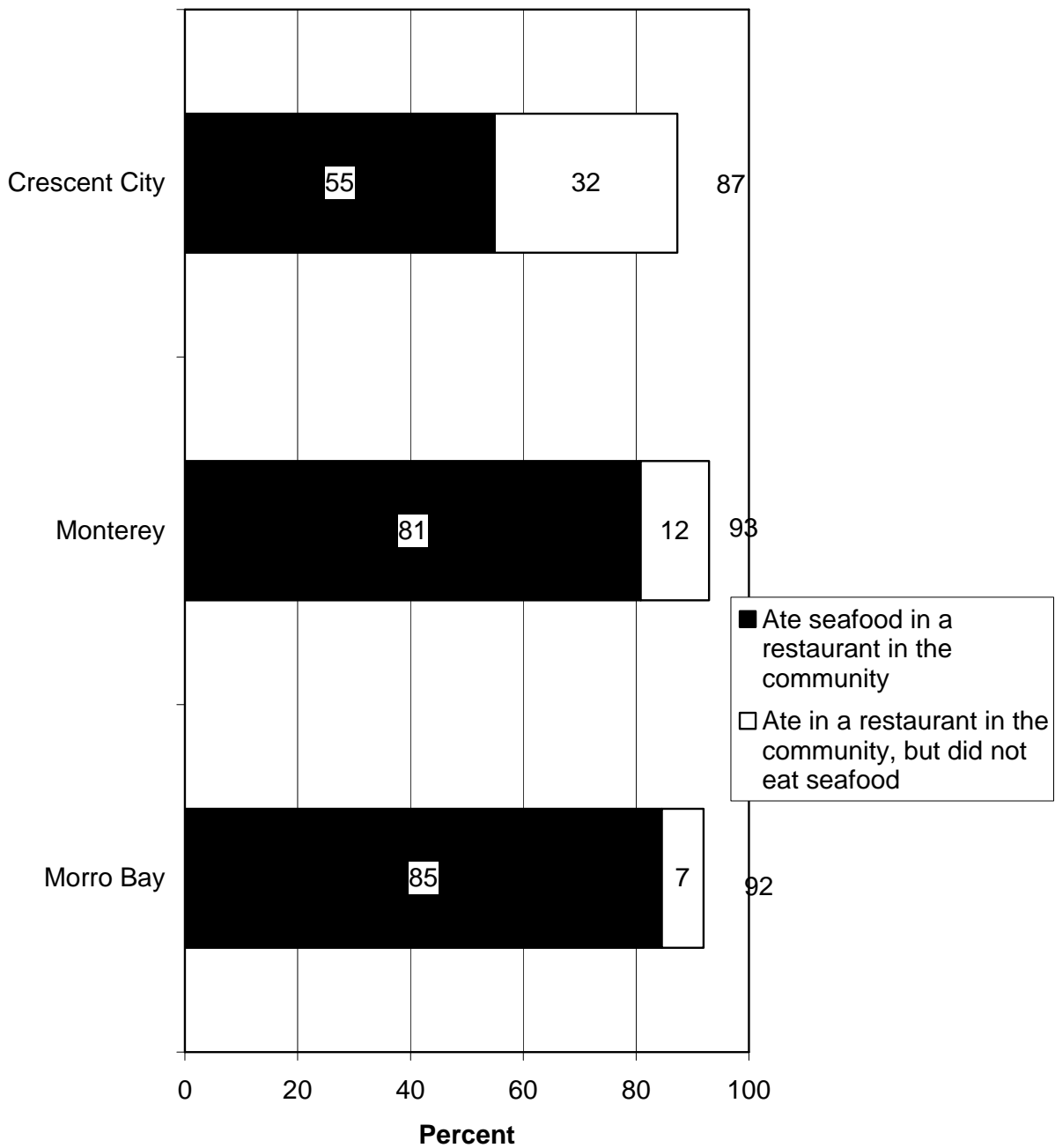
seek out restaurants in the respective community for seafood: 48% of Crescent City visitors, 74% of Monterey visitors, and 79% of Morro Bay visitors.

- The survey asked about the importance respondents place on eight factors in deciding whether to go to a restaurant in the three communities. Four of the items relate specifically to types of food (seafood, steaks, vegetarian food, and ethnic food), and the four remaining items pertain to cost, the fishery itself, and the local fishing fleets. The results of these individual questions were then ranked. In general, respondents show great concern for the fishery and the local fishing fleet (knowing that the seafood is caught in a sustainable way; knowing that the seafood is caught by local fishermen), they show great concern for being able to get fresh seafood, and they show moderate concern about cost. Of little importance is being able to get good steaks, vegetarian food, or ethnic food—in all cases, being able to get seafood is much more important than being able to get these other foods. (For each community, four graphs are shown: the percent saying the items are *very* important, the percent saying the items are *very* or *somewhat* important, the percent saying the items are *very* or *somewhat* unimportant, and the percent saying the items are *very* unimportant.)
- Among Crescent City visitors, three items are clustered with approximately half of respondents saying that the factors are *very* important in their decision whether to go to a restaurant in Crescent City: knowing that the seafood being served is fished in a way that does not endanger the fishery itself (56% say this is *very* important), being able to get fresh local seafood (55%), and knowing that the seafood is caught by local fishermen (48%). The cost of meals (31%), being able to get good steaks (30%), and the cost of seafood (23%) are grouped together. At the bottom of the ranking are being able to get vegetarian food (8%) and being able to get ethnic food (3%). When examining the percent who say *very* or *somewhat* important, the cost of meals rises to the top of the ranking; otherwise, the ranking is about the same.
 - Among Monterey visitors, the same three items that are at the top of the ranking among Crescent City respondents are at the top of the ranking among Monterey visitors: being able to get fresh local seafood (45% say this is *very* important), knowing that the seafood being served is fished in a way that does not endanger the fishery itself (43%), and knowing that the seafood is caught by local fishermen (38%). All remaining items have

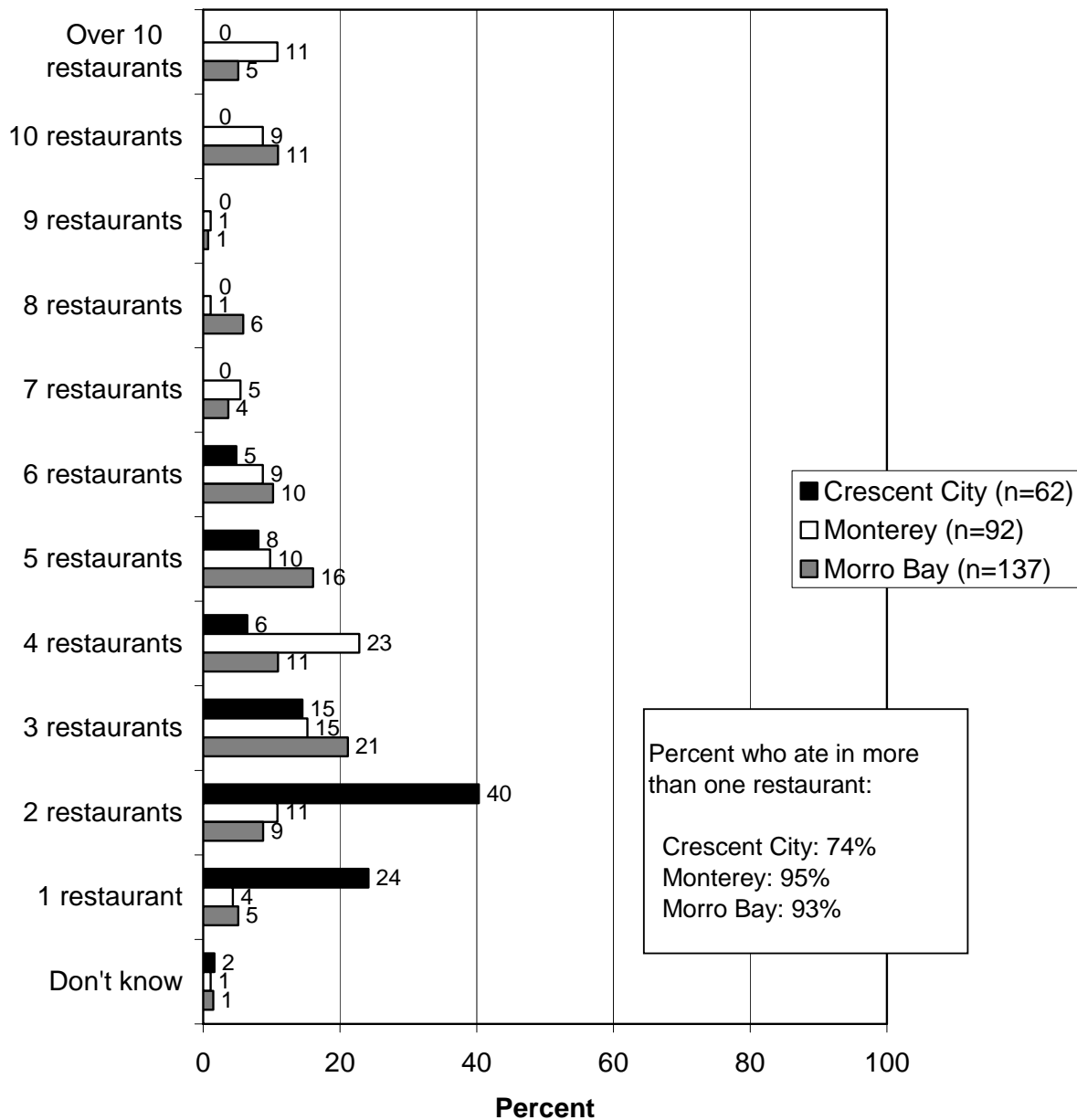
less than a quarter of respondents saying they are *very* important, with being able to get vegetarian food (12%) and being able to get ethnic food (6%) at the bottom of the ranking. Again, when examining the *very* and *somewhat* important together, cost of meals and the cost of seafood rise in the ranking.

- Morro Bay visitors are similar to visitors of the other communities: at the top of the ranking among Morro Bay visitors is being able to get fresh local seafood (51% say this is *very* important), knowing that the seafood is caught by local fishermen (45%), and knowing that the seafood being served is harvested in a way that does not endanger the fishery itself (38%). Cost ranks below these items: cost of meals (27%) and the cost of seafood (25%). Being able to get good steaks (19%), being able to get vegetarian food (9%), and being able to get ethnic food (6%) are at the bottom of the ranking. When examining *very* and *somewhat* important together, the ranking remains about the same, although cost becomes nearly as important as the other items.

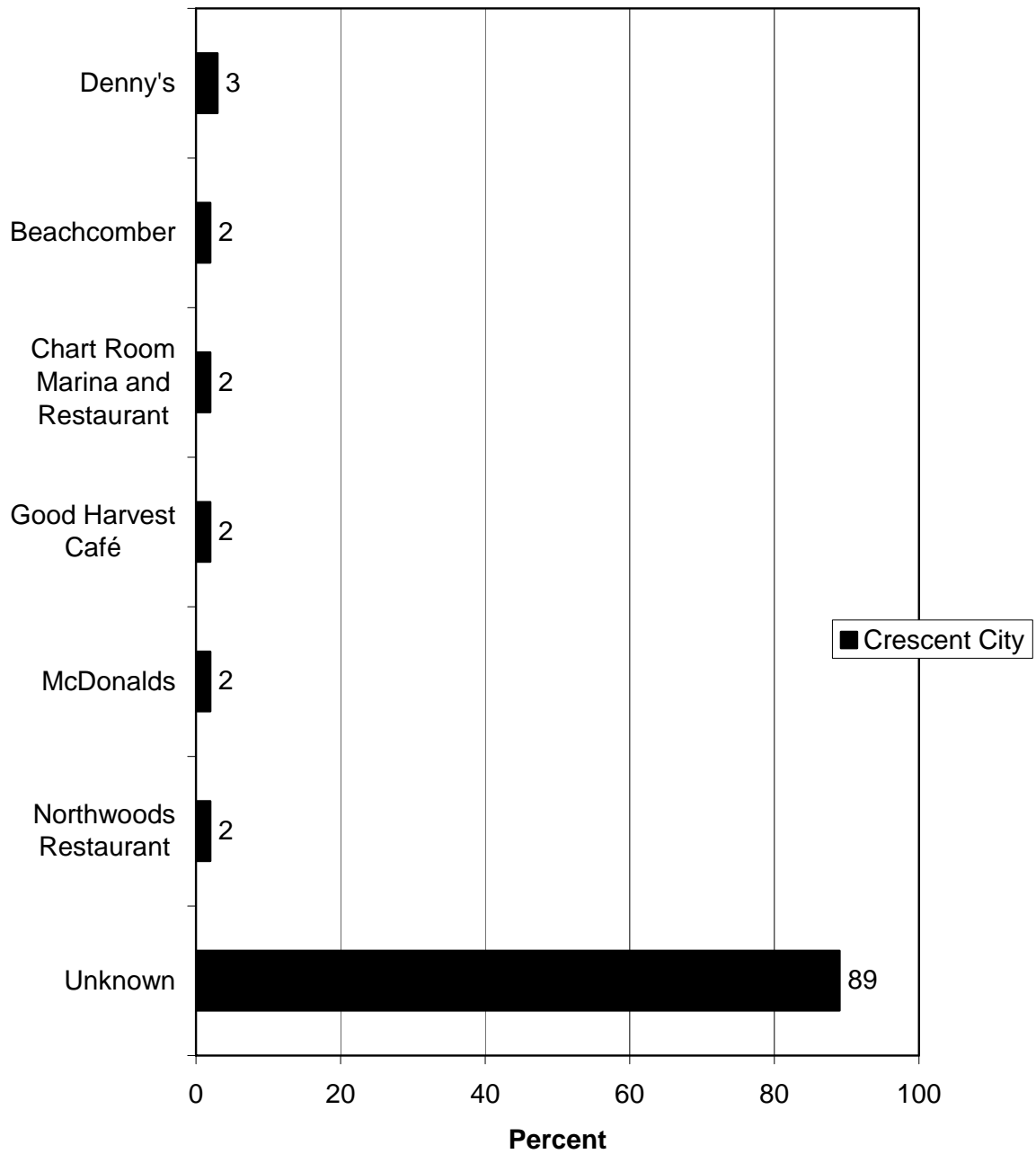
Q14/21. Percent of visitors who ate in a restaurant and who ate seafood in a restaurant. (Among all respondents.)



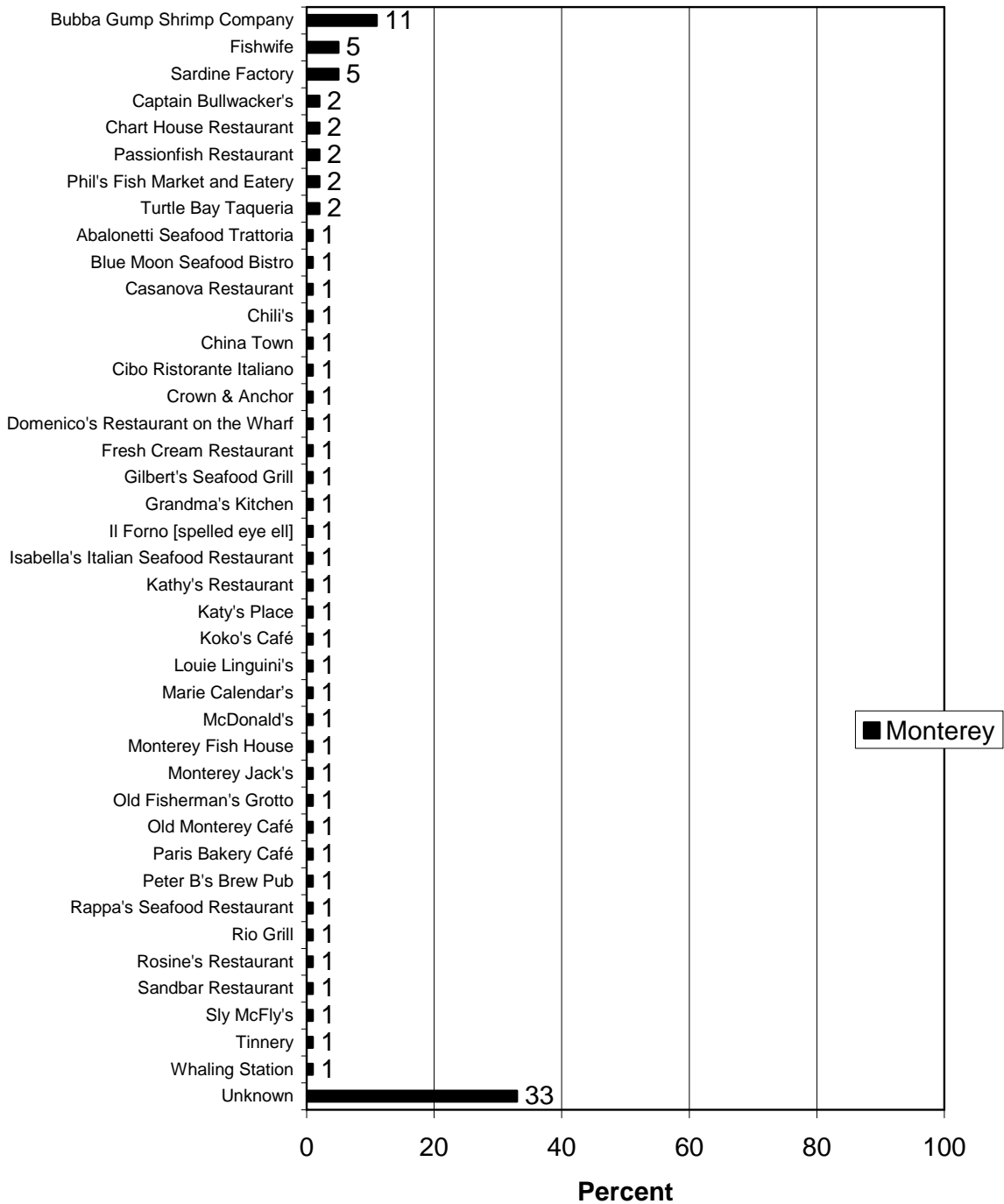
**Q15. How many different Monterey / Morro Bay / Crescent City restaurants have you eaten in?
(Asked of those who ate in a Monterey / Morro Bay / Crescent City restaurant in the past 2 years.)**



Q20. What was the name of the last restaurant you visited? (Crescent City)



Q20. What was the name of the last restaurant you visited? (Monterey)

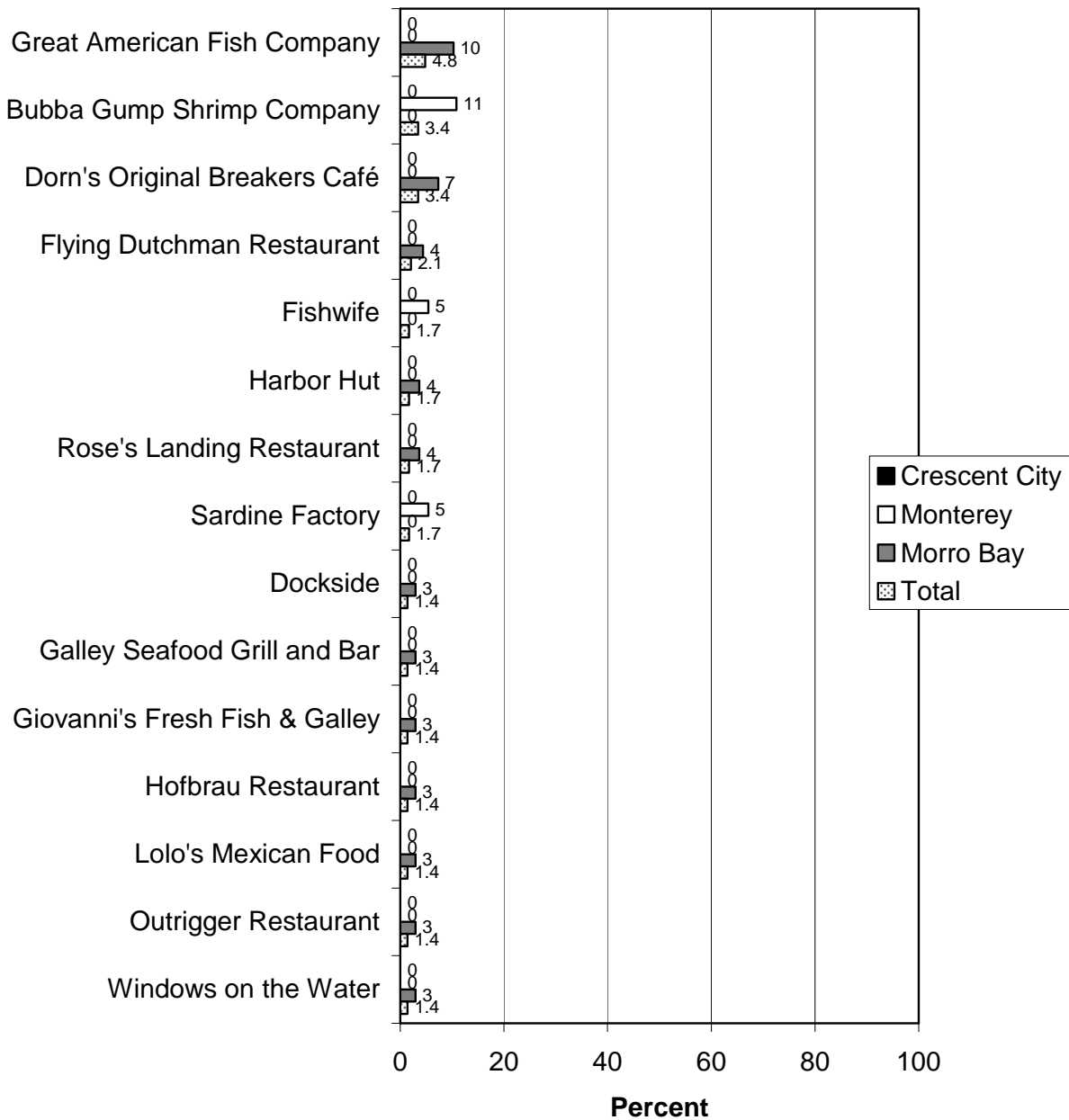


Q20. What was the name of the last restaurant you visited? (Morro Bay)

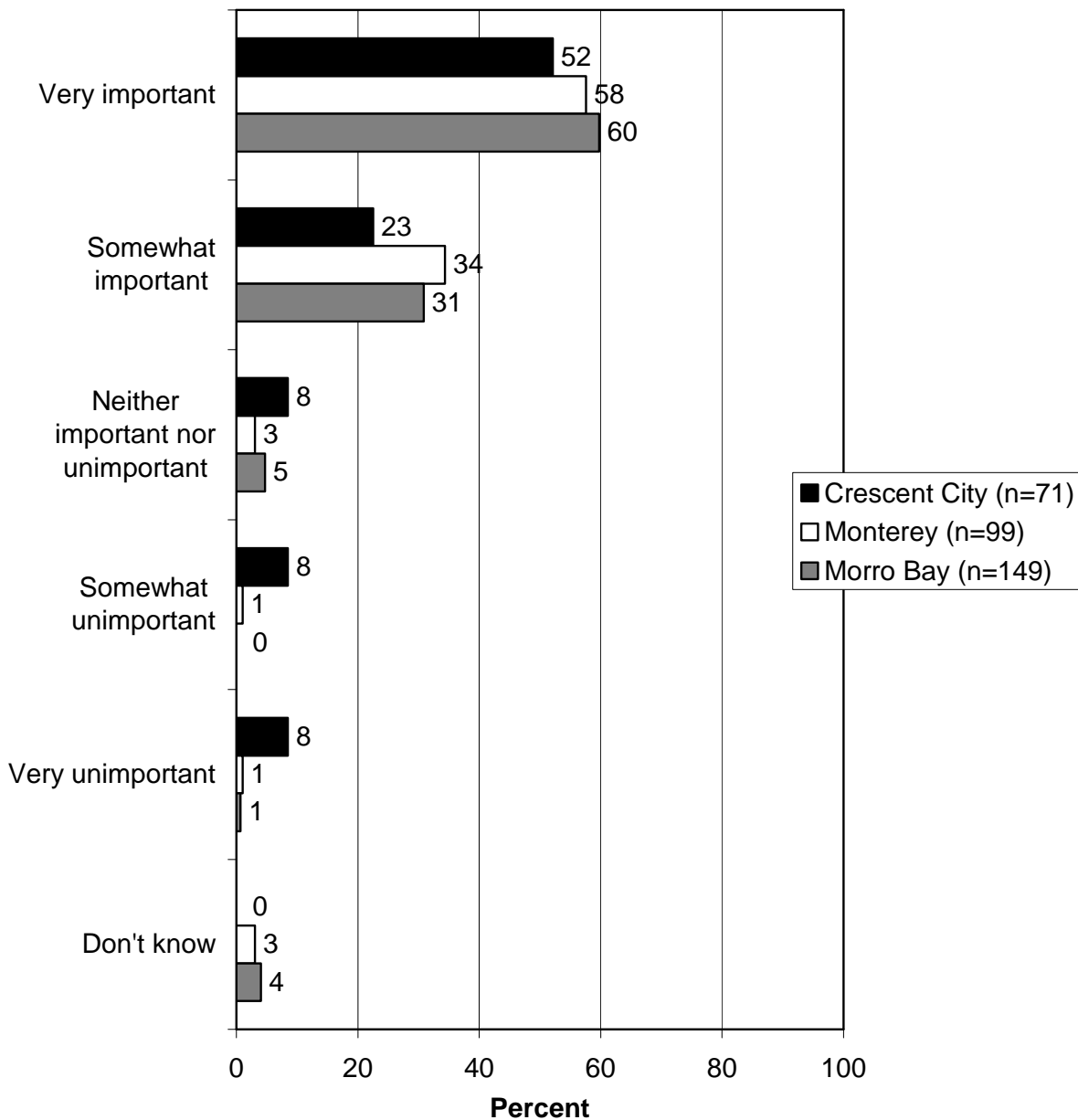


Q20. What was the name of the last restaurant you visited?

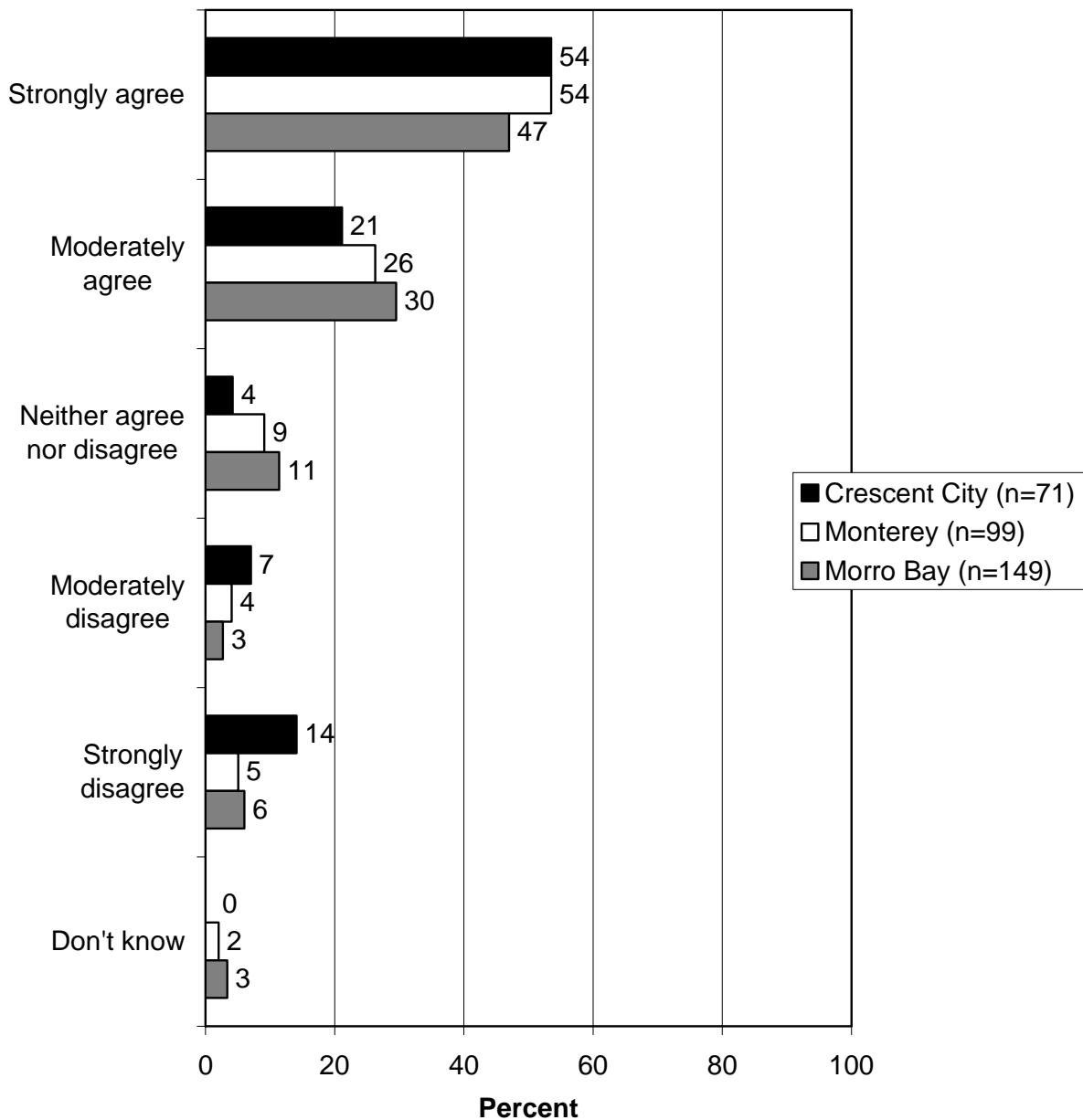
(Only showing responses that are 1.4% and higher for the total combination of all three communities)



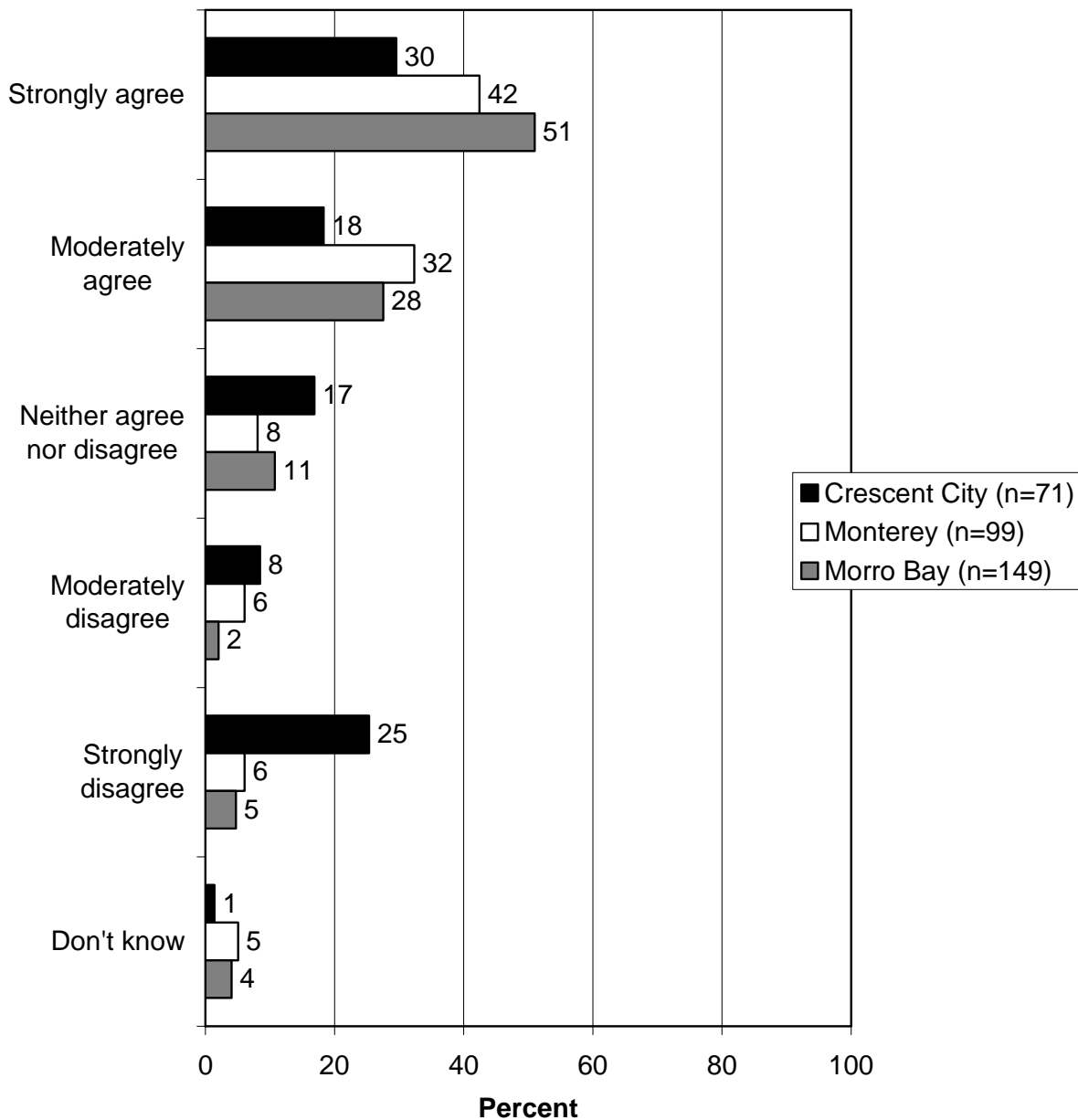
Q35. What about being able to go to a good restaurant?



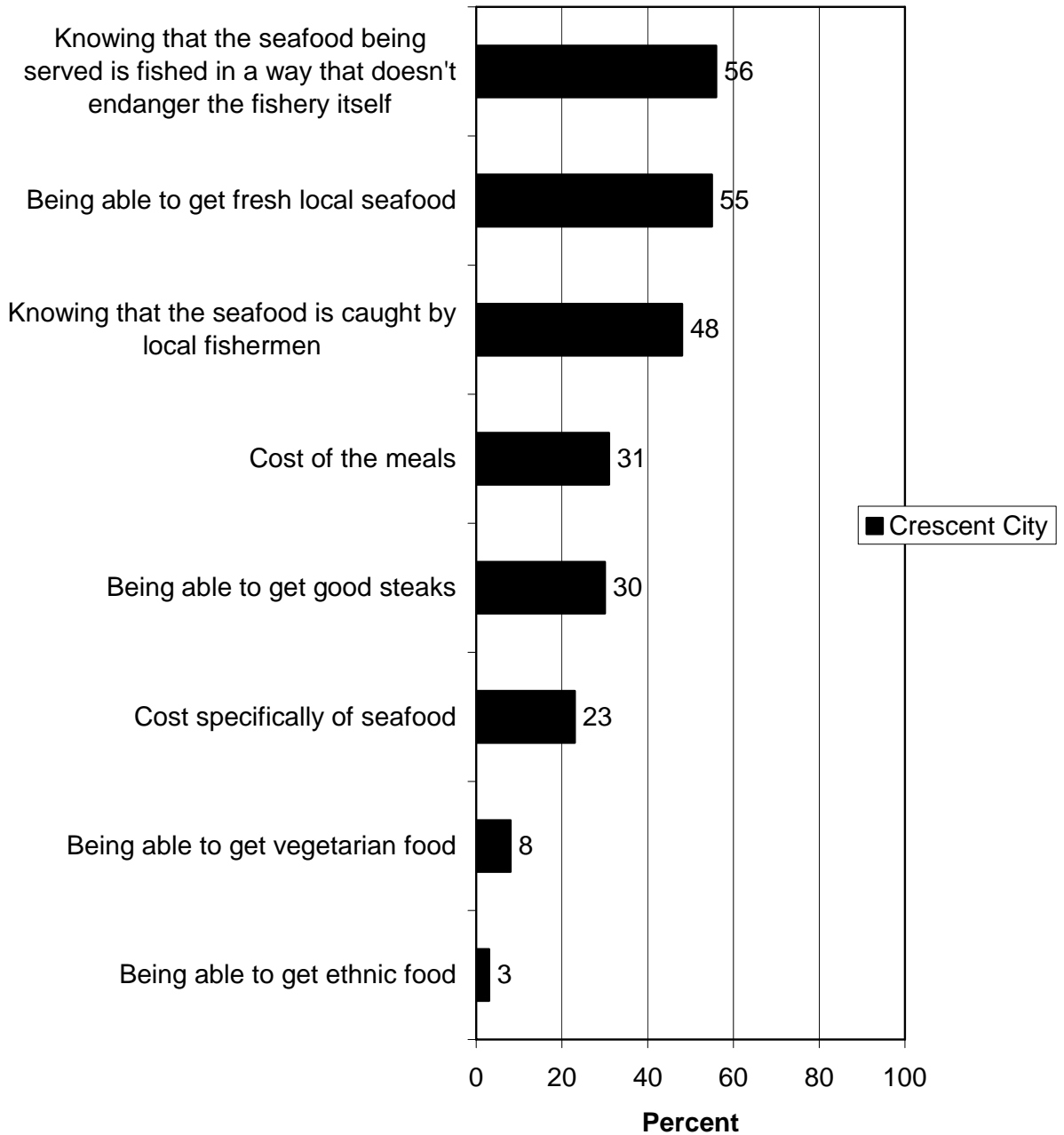
Q49. Sometimes I seek out restaurants specifically for seafood. (Do you agree or disagree with this statement?)



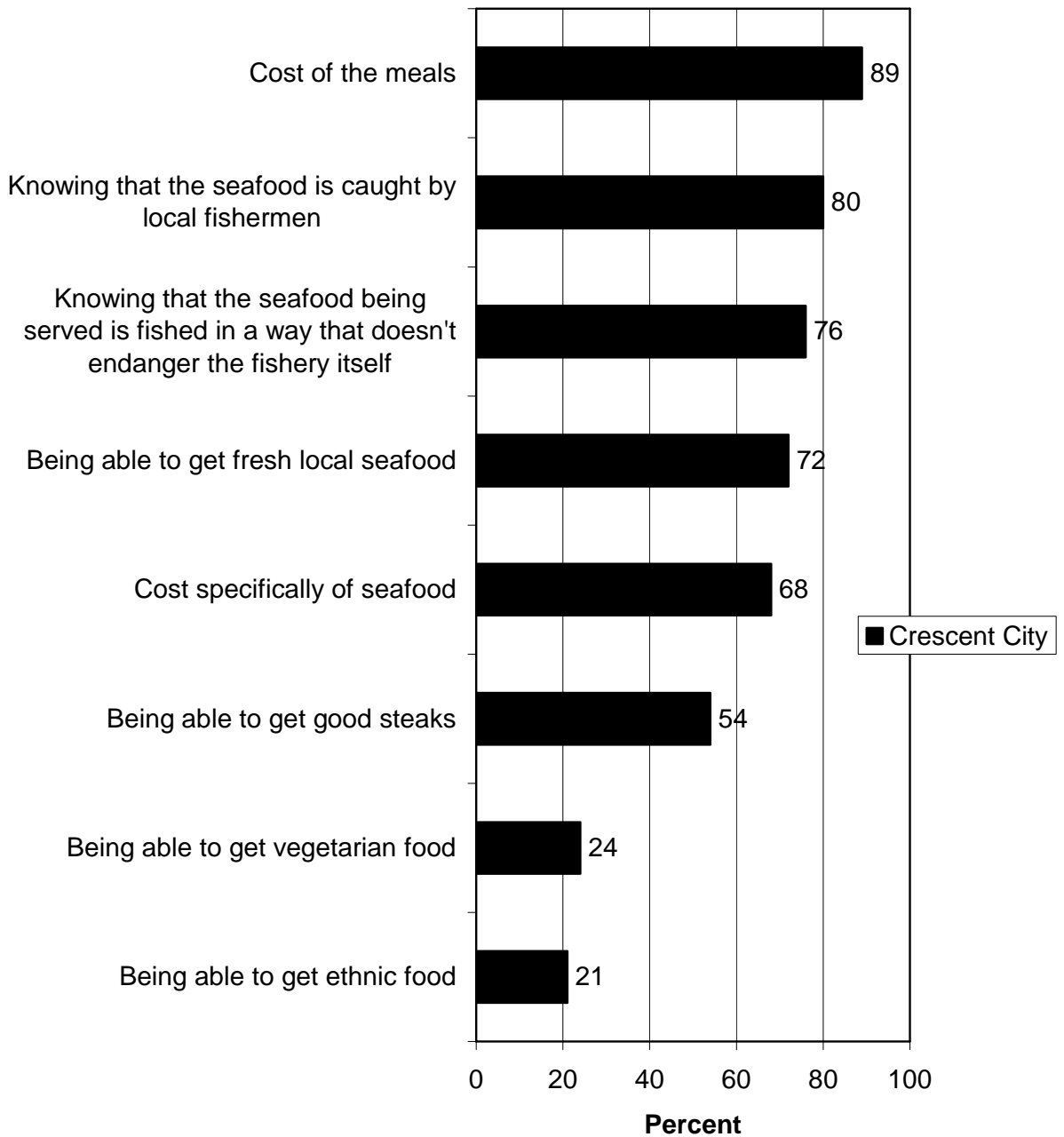
Q50. Sometimes I seek out restaurants specifically for seafood in Monterey / Morro Bay / Crescent City. (Do you agree or disagree with this statement?)



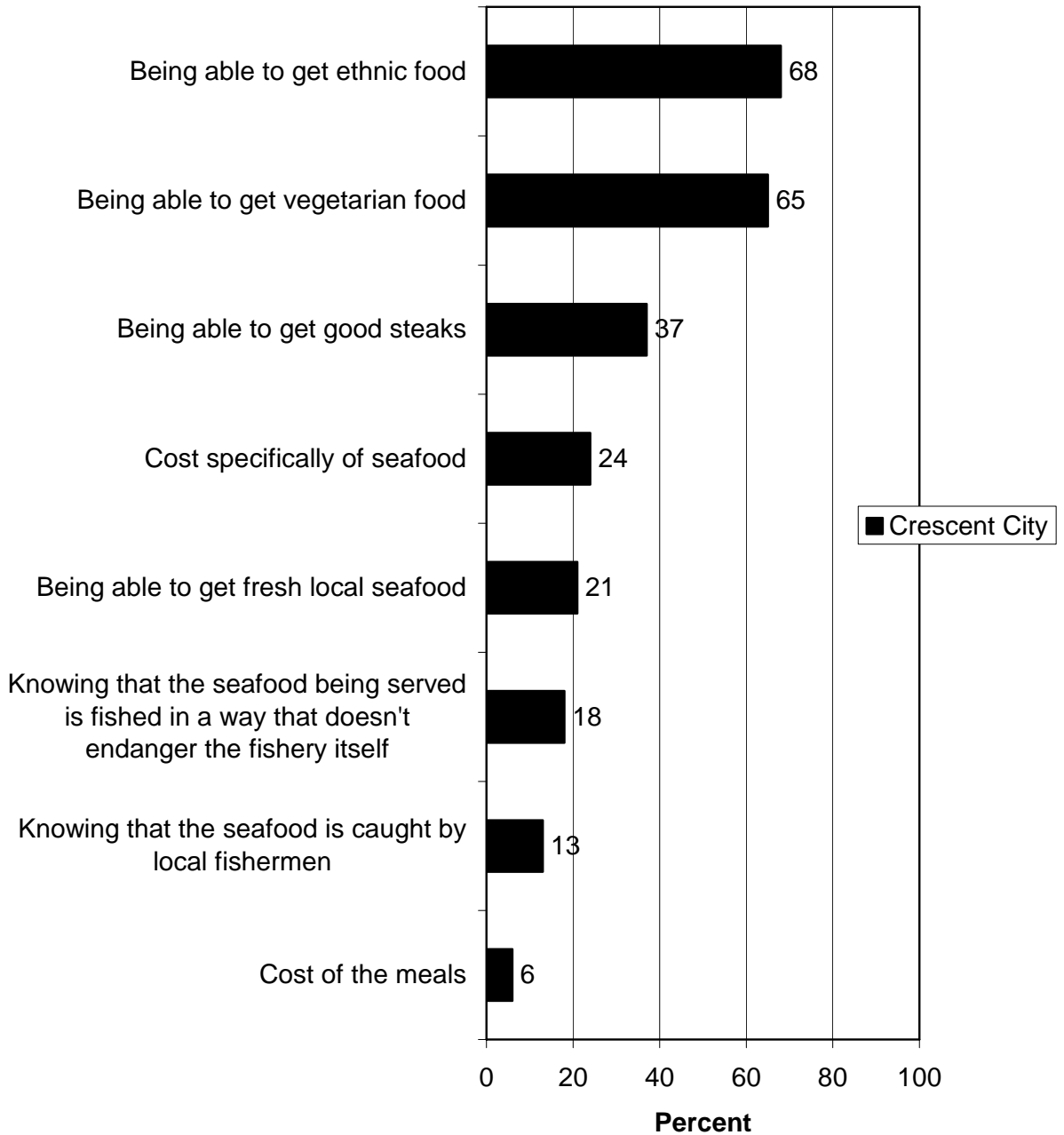
Percent who indicated that the following things would be very important if he/she were to go to a restaurant in Crescent City.



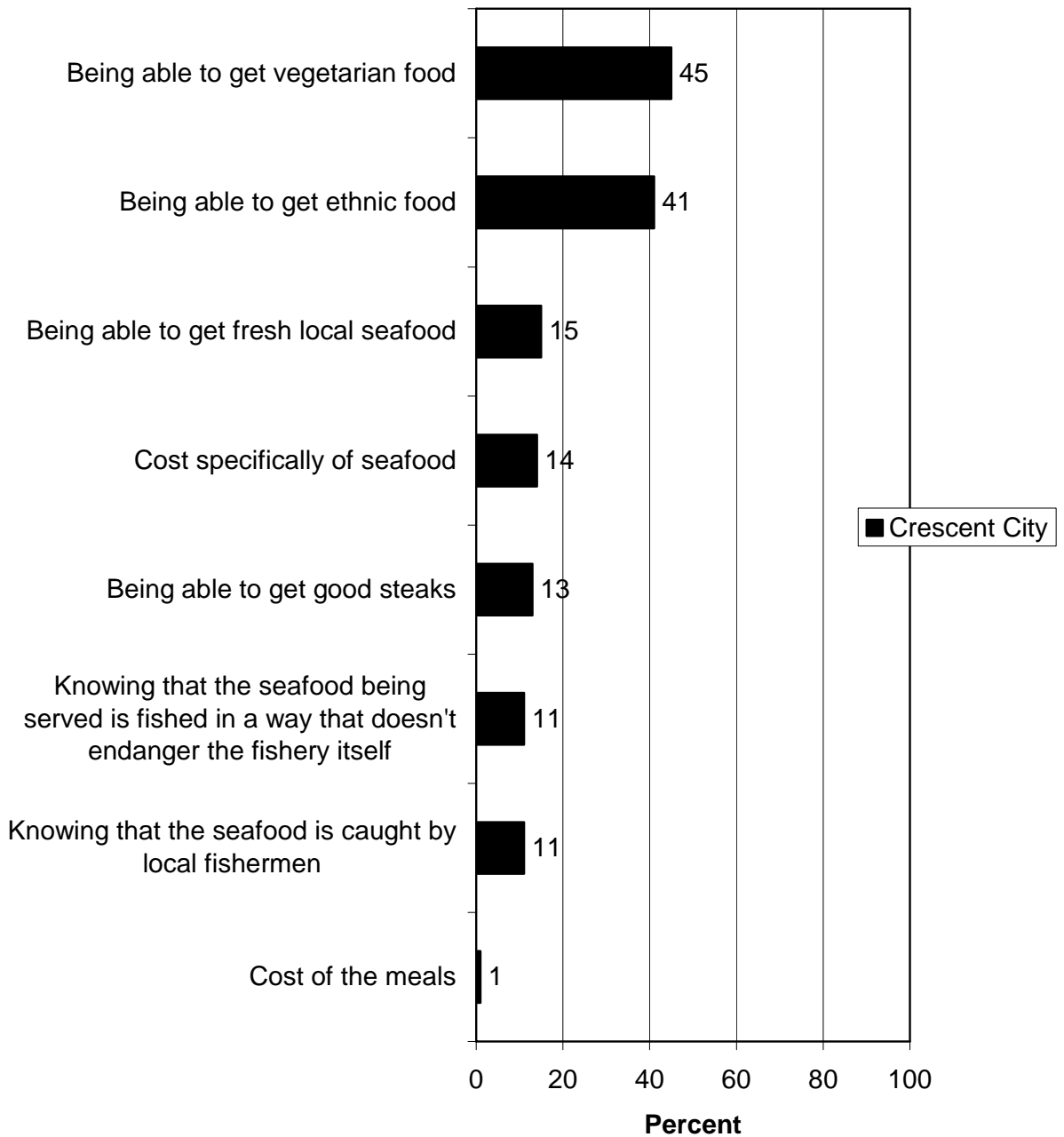
Percent who indicated that the following things would be very or somewhat important if he/she were to go to a restaurant in Crescent City.



Percent who indicated that the following things would be somewhat or very unimportant if he/she were to go to a restaurant in Crescent City.



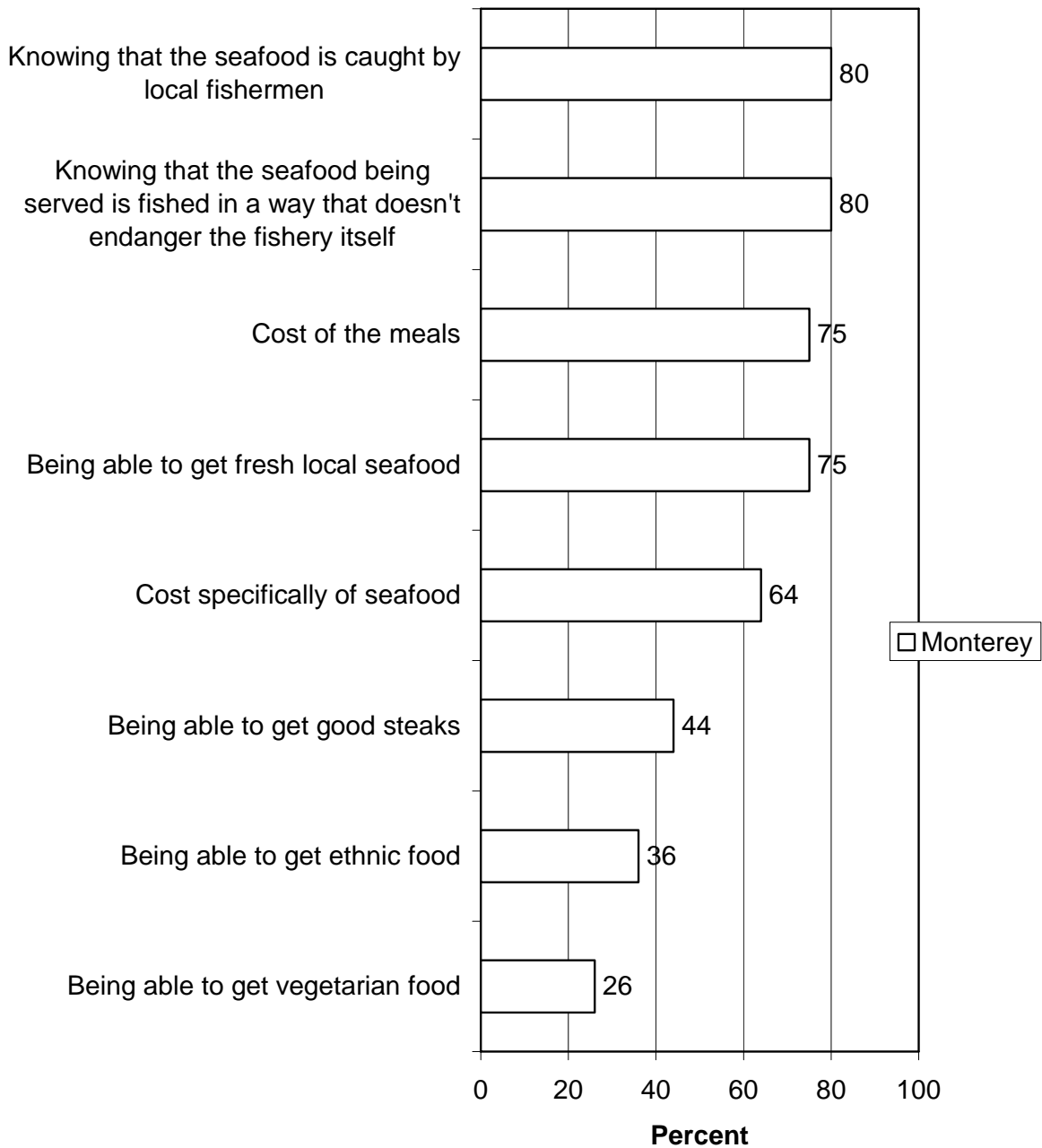
Percent who indicated that the following things would be very unimportant if he/she were to go to a restaurant in Crescent City.



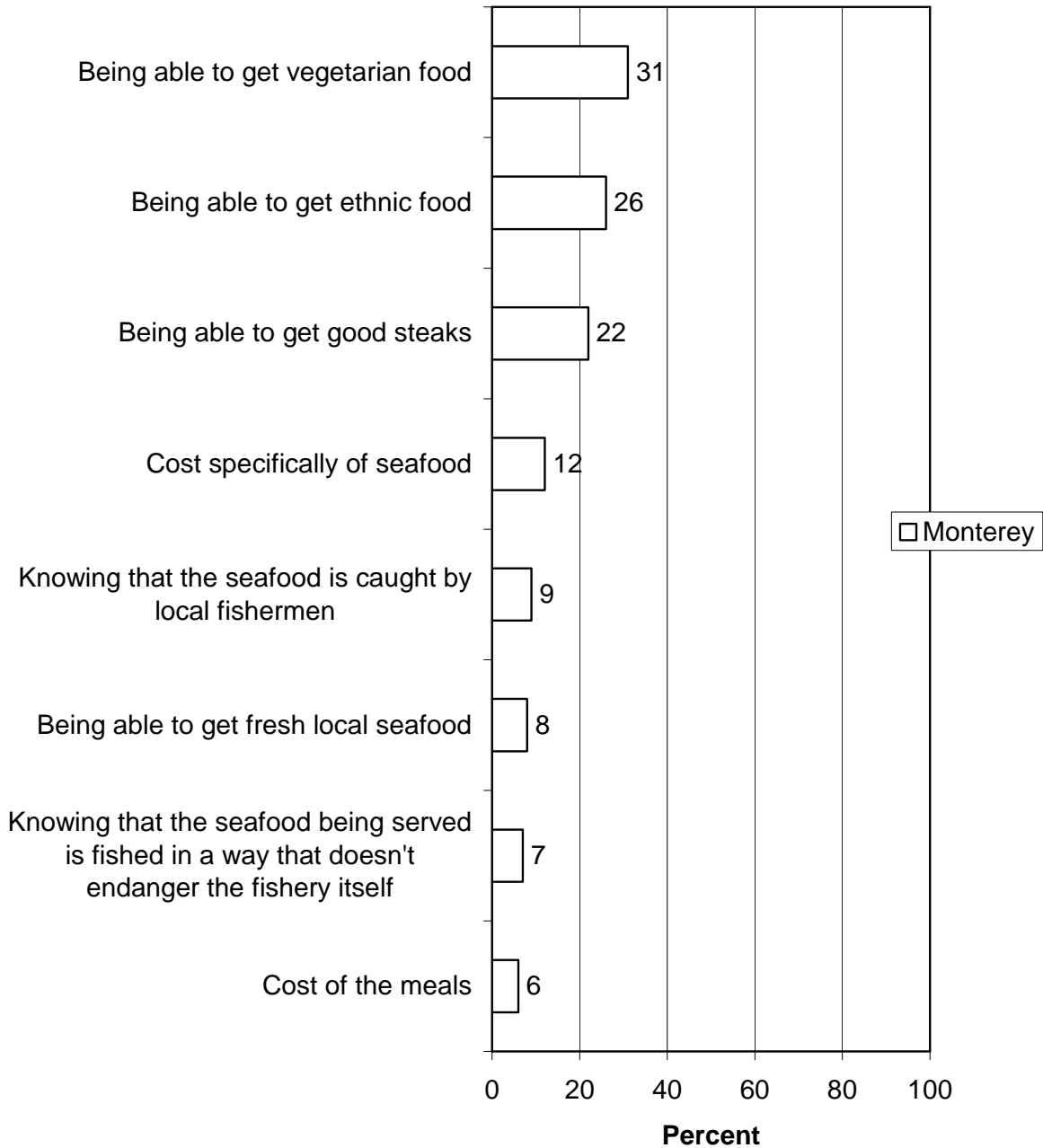
Percent who indicated that the following things would be very important if he/she were to go to a restaurant in Monterey.



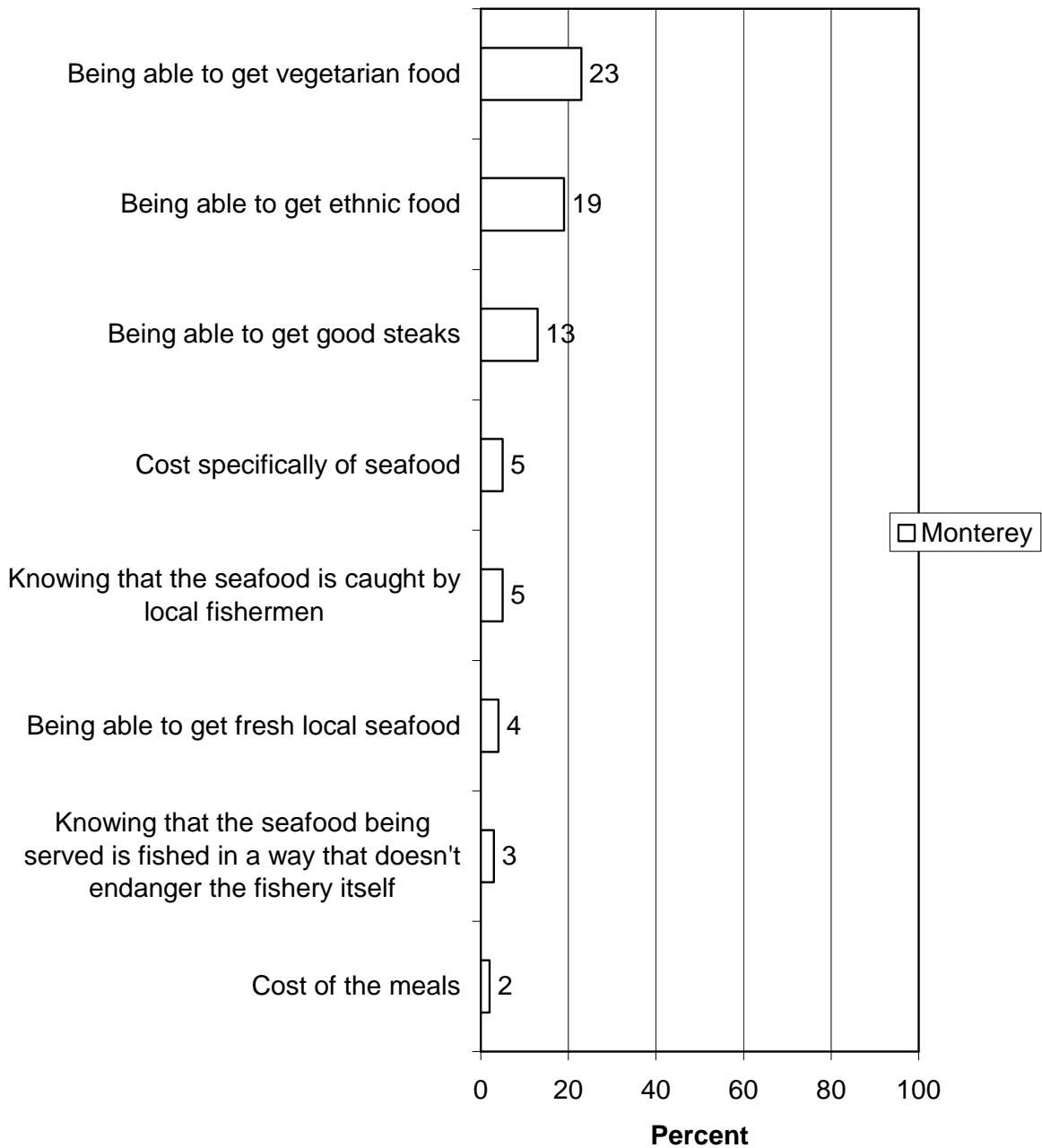
Percent who indicated that the following things would be very or somewhat important if he/she were to go to a restaurant in Monterey.



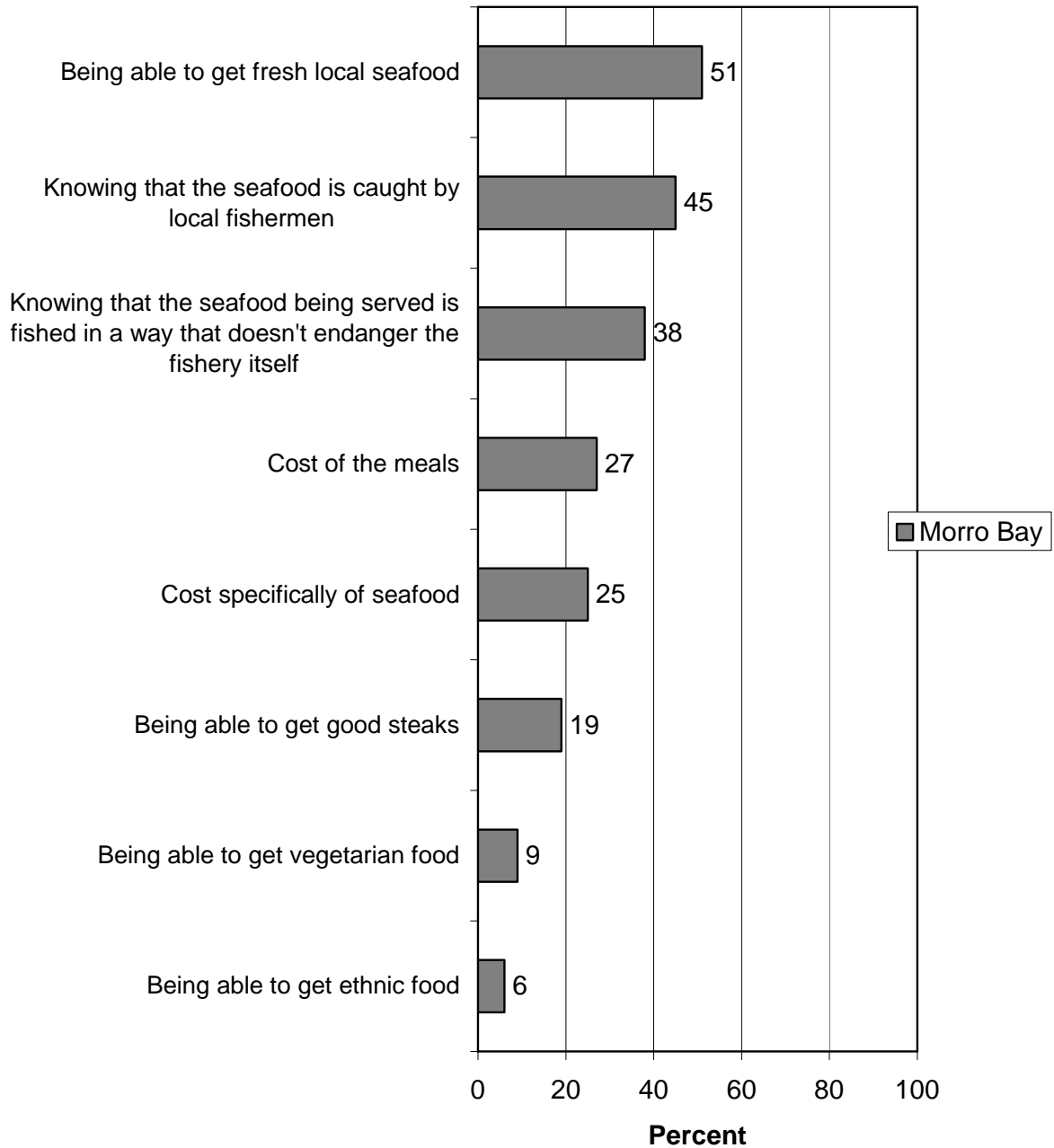
Percent who indicated that the following things would be somewhat or very unimportant if he/she were to go to a restaurant in Monterey.



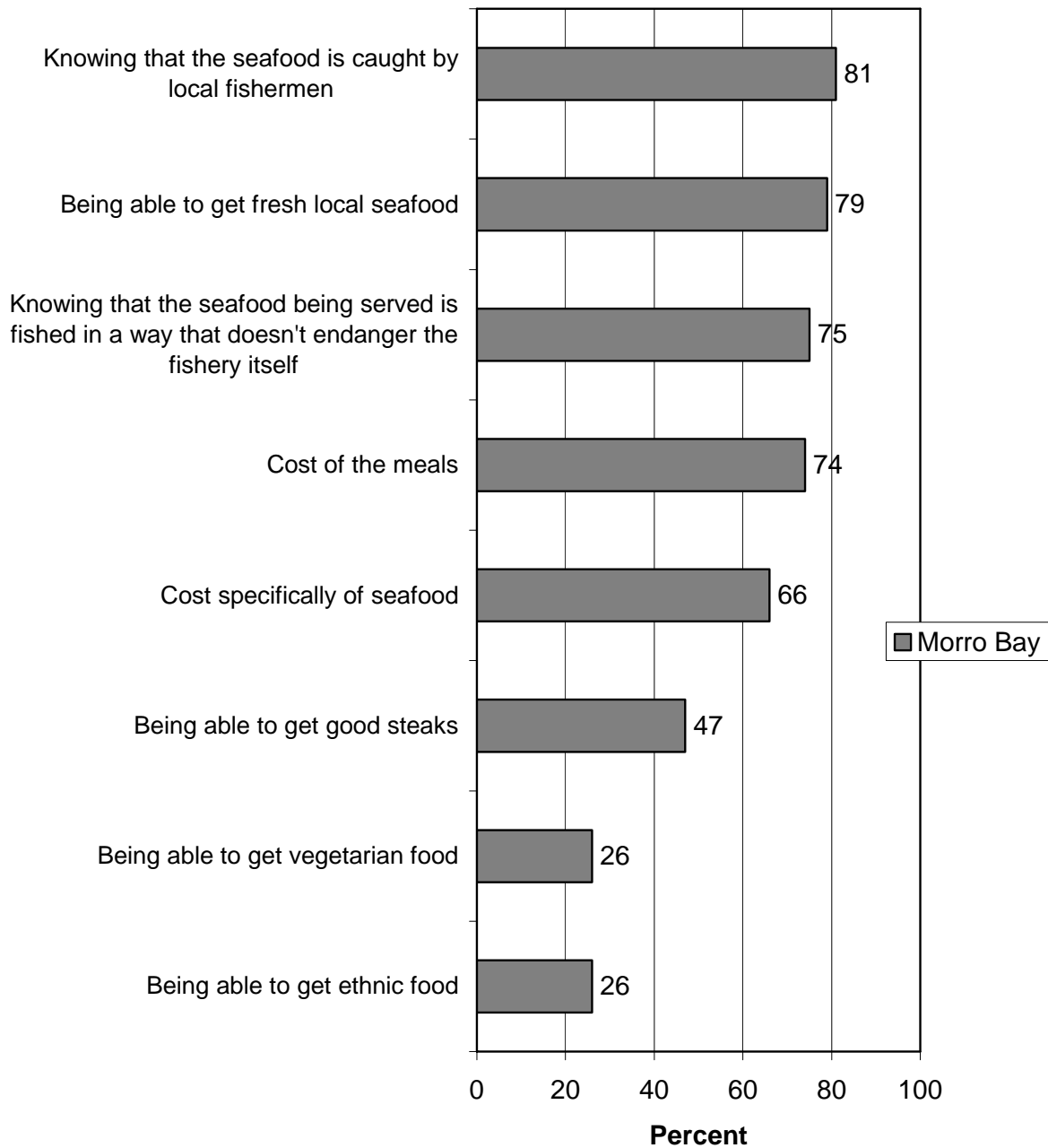
Percent who indicated that the following things would be very unimportant if he/she were to go to a restaurant in Monterey.



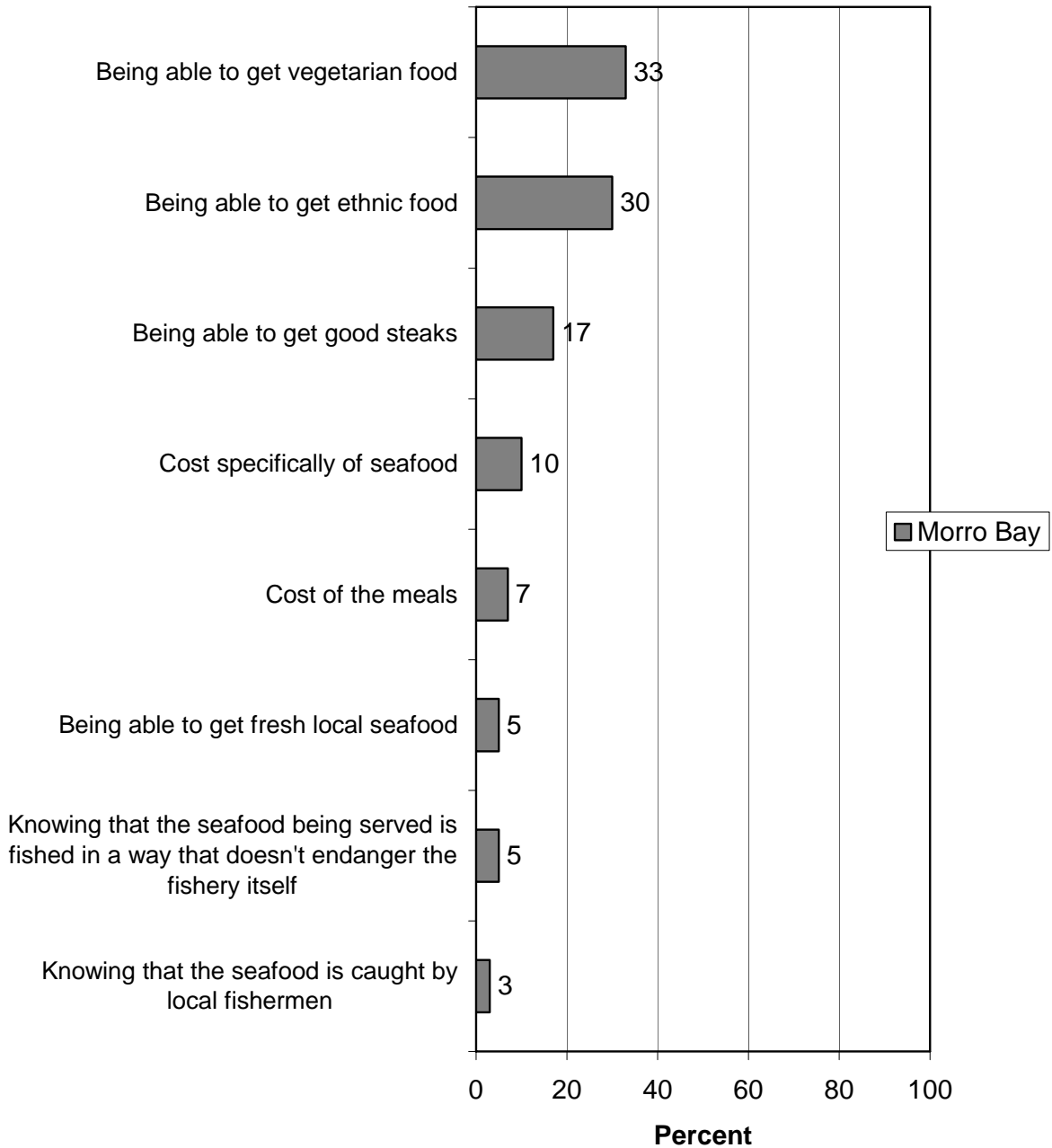
Percent who indicated that the following things would be very important if he/she were to go to a restaurant in Morro Bay.



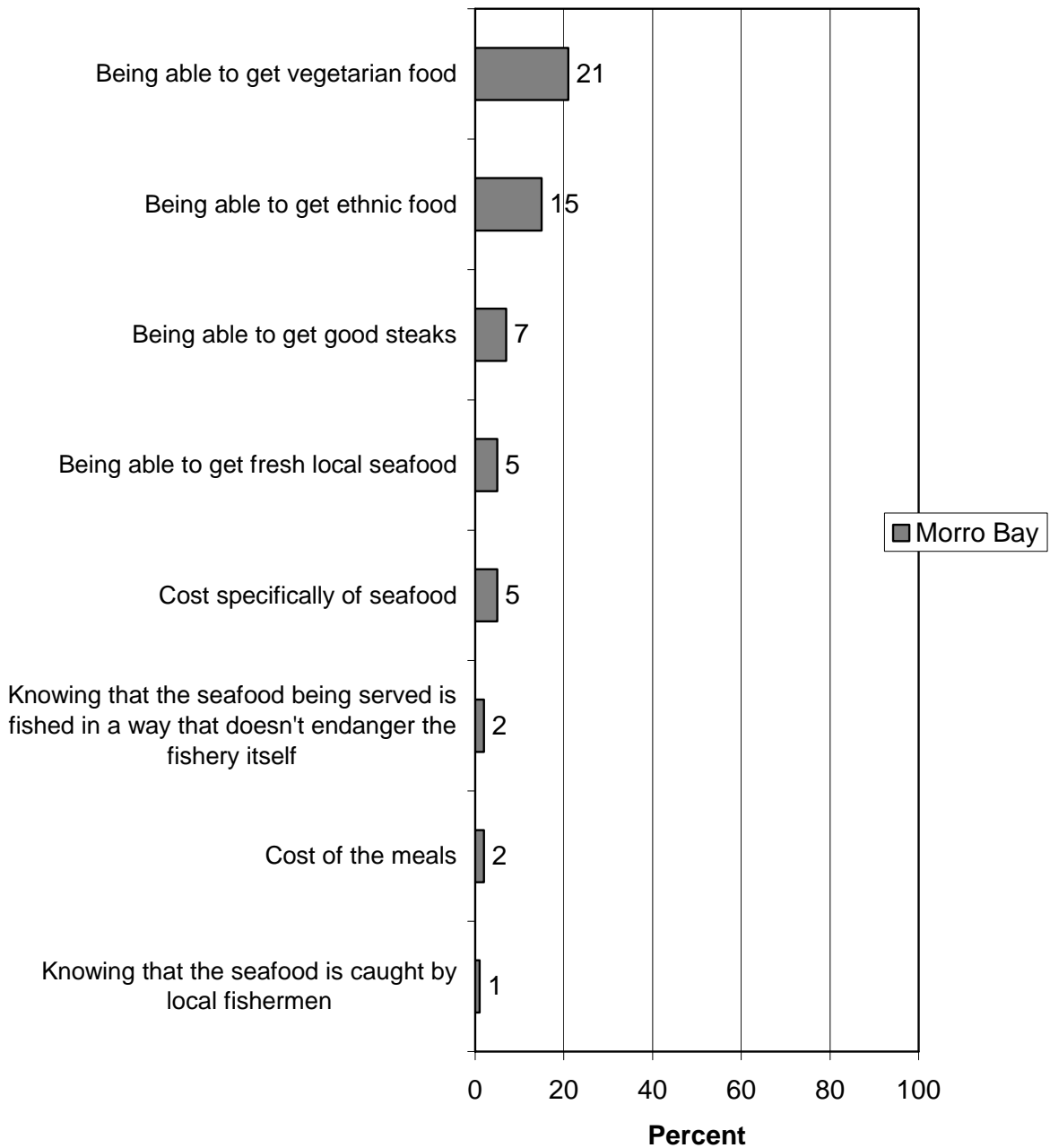
Percent who indicated that the following things would be very or somewhat important if he/she were to go to a restaurant in Morro Bay.



Percent who indicated that the following things would be somewhat or very unimportant if he/she were to go to a restaurant in Morro Bay.



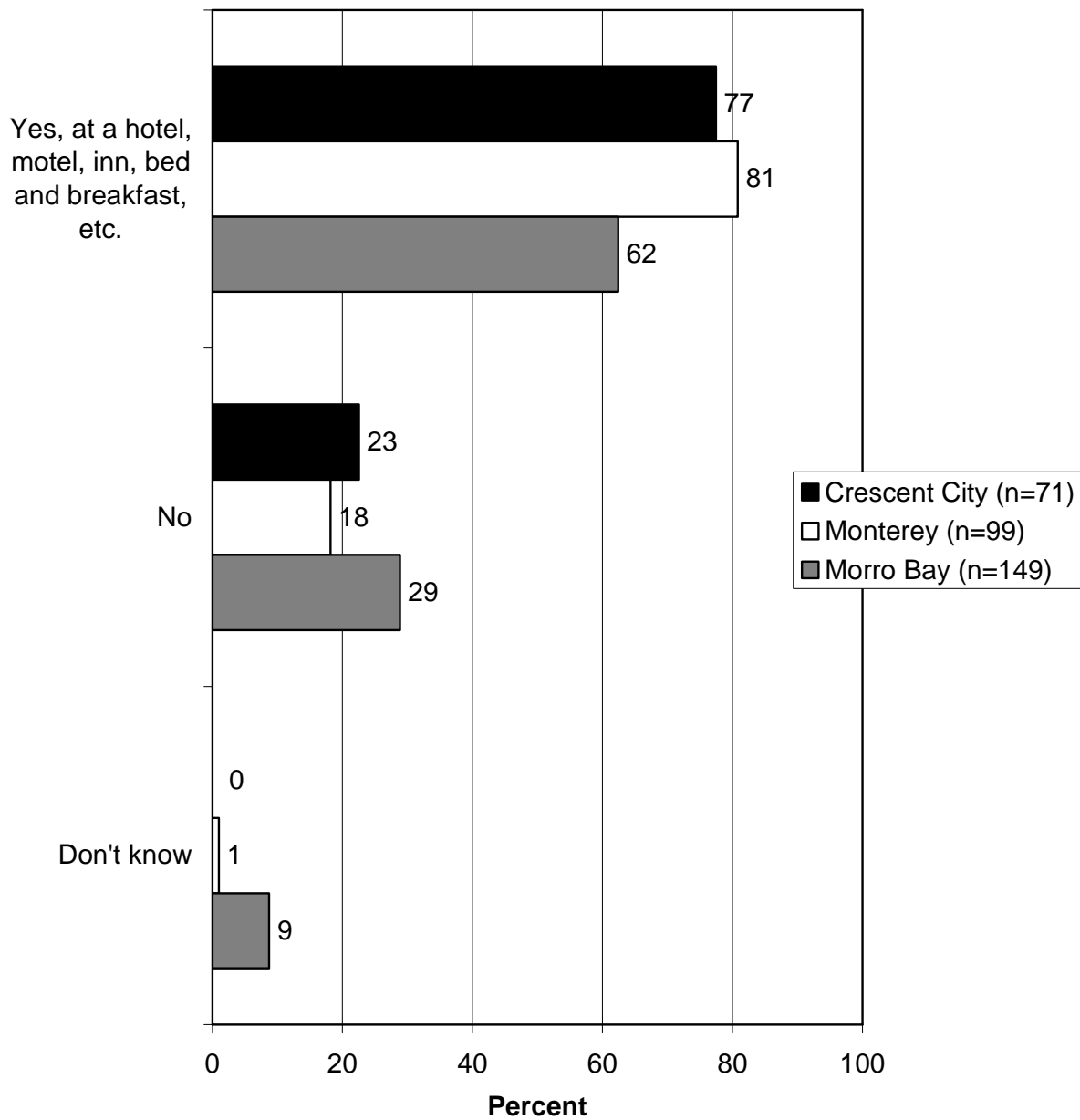
Percent who indicated that the following things would be very unimportant if he/she were to go to a restaurant in Morro Bay.



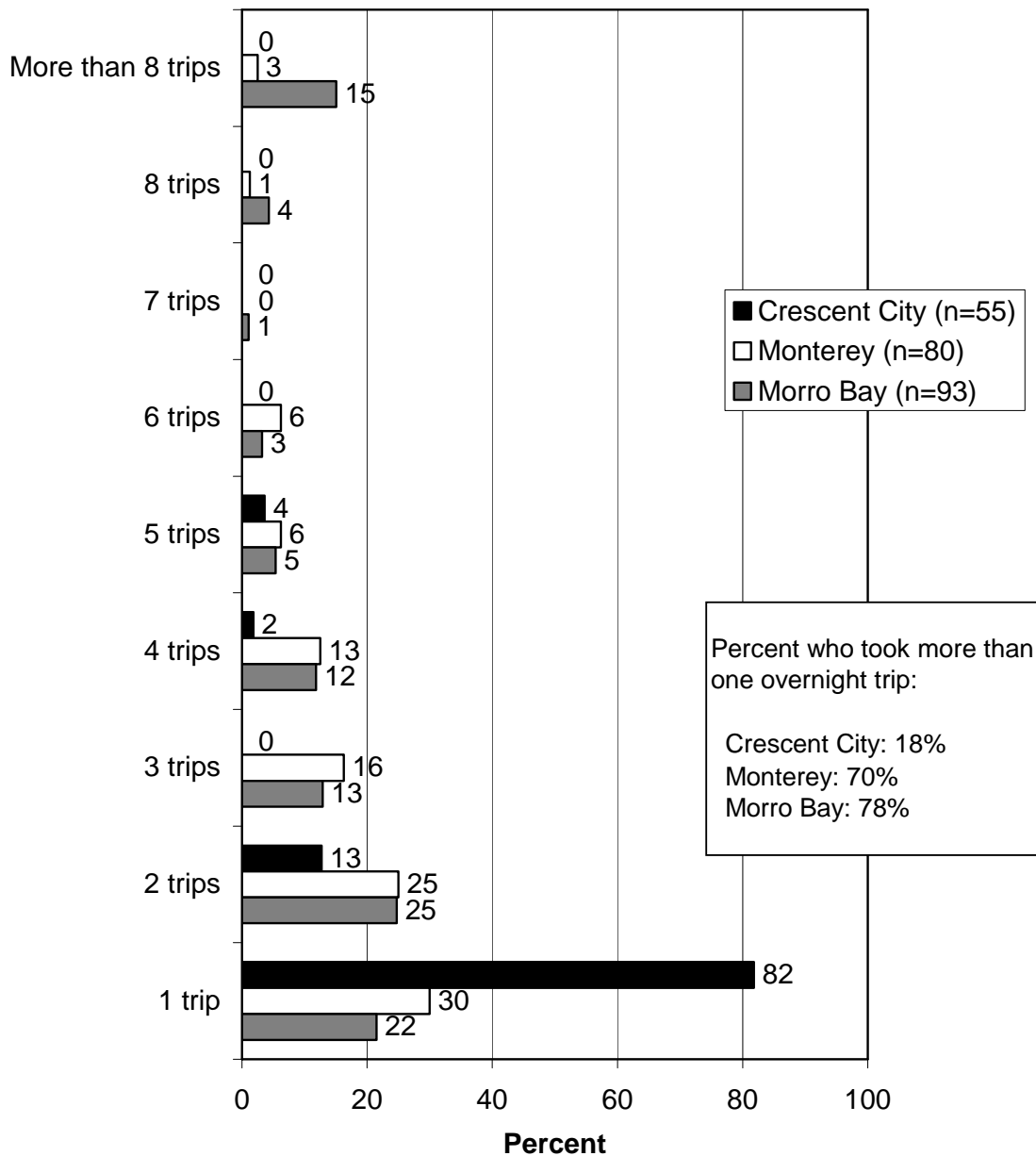
Overnight Visits to Crescent City, Monterey, and Morro Bay

- Large majorities of visitors to each community had stayed overnight in the respective community: 77% of Crescent City visitors, 81% of Monterey visitors, and 62% of Morro Bay visitors.
 - Most of those visitors to Monterey and Morro Bay who took an overnight trip to these communities took more than one trip: 70% of Monterey visitors and 78% of Morro Bay visitors. However, only 18% of Crescent City visitors who took an overnight trip took more than one trip. Also shown is the number of nights in which these respondents stayed in the respective communities.

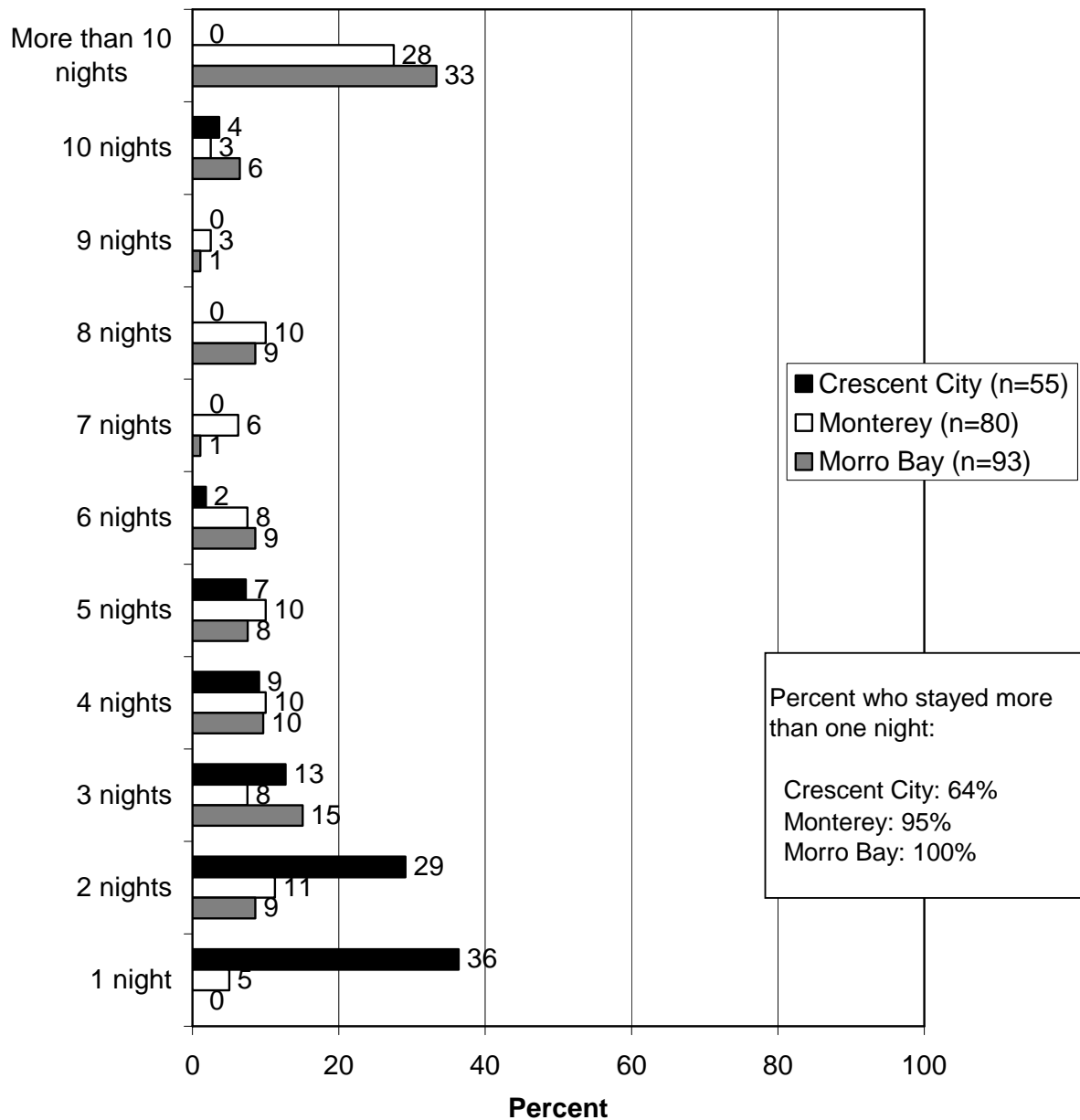
Q25. Did you stay overnight in Monterey / Morro Bay / Crescent City in the past 2 years?



Q26. How many overnight trips have you made to Monterey / Morro Bay / Crescent City in the past 2 years? (Asked of those who stayed in overnight lodging in Monterey / Morro Bay / Crescent City in the past 2 years.)



Q28. How many nights in total have you stayed in Monterey / Morro Bay / Crescent City in the past 2 years? (Asked of those who stayed in overnight lodging in Monterey / Morro Bay / Crescent City in the past 2 years.)

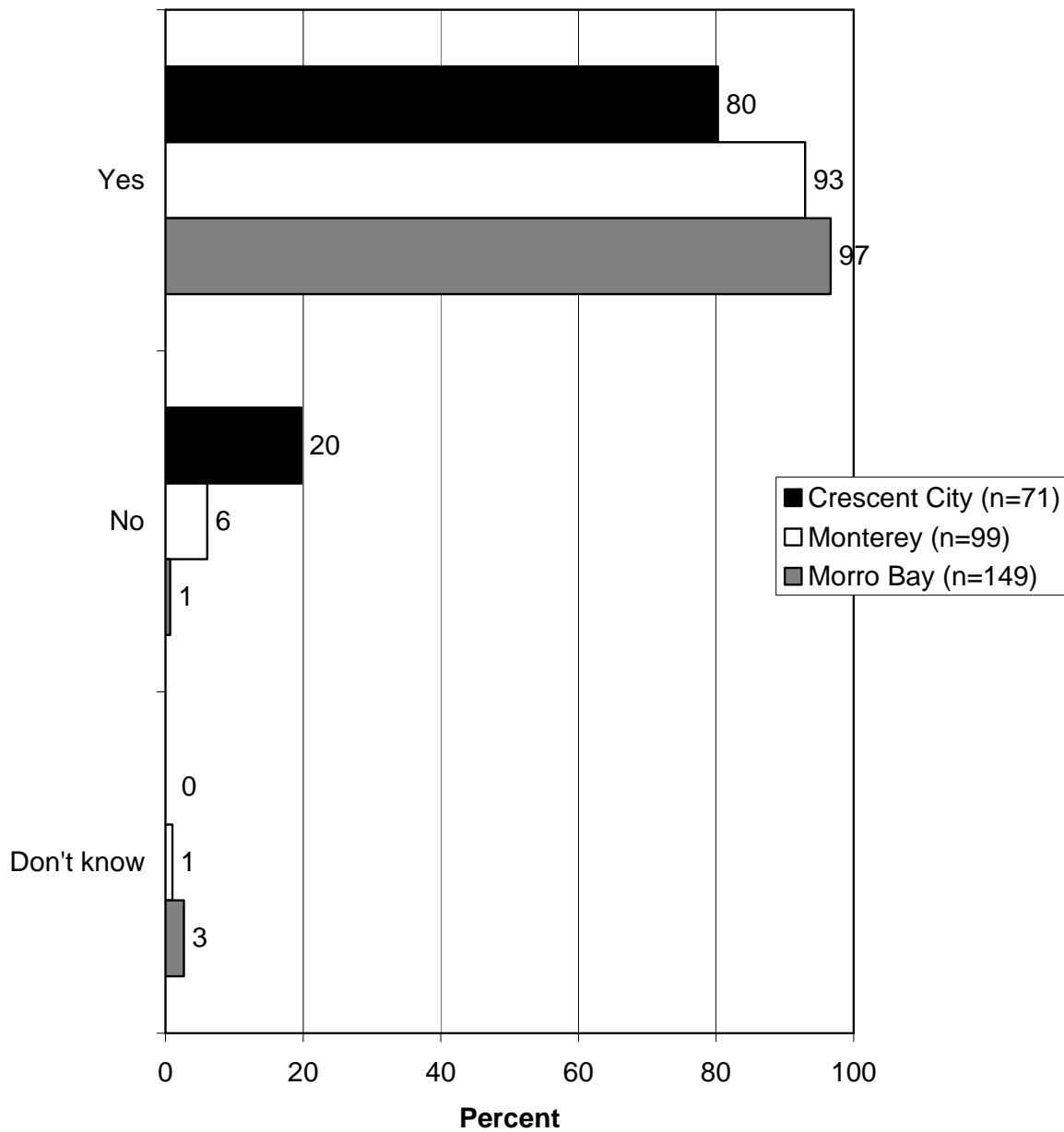


Visiting the Waterfronts of Crescent City, Monterey, and Morro Bay

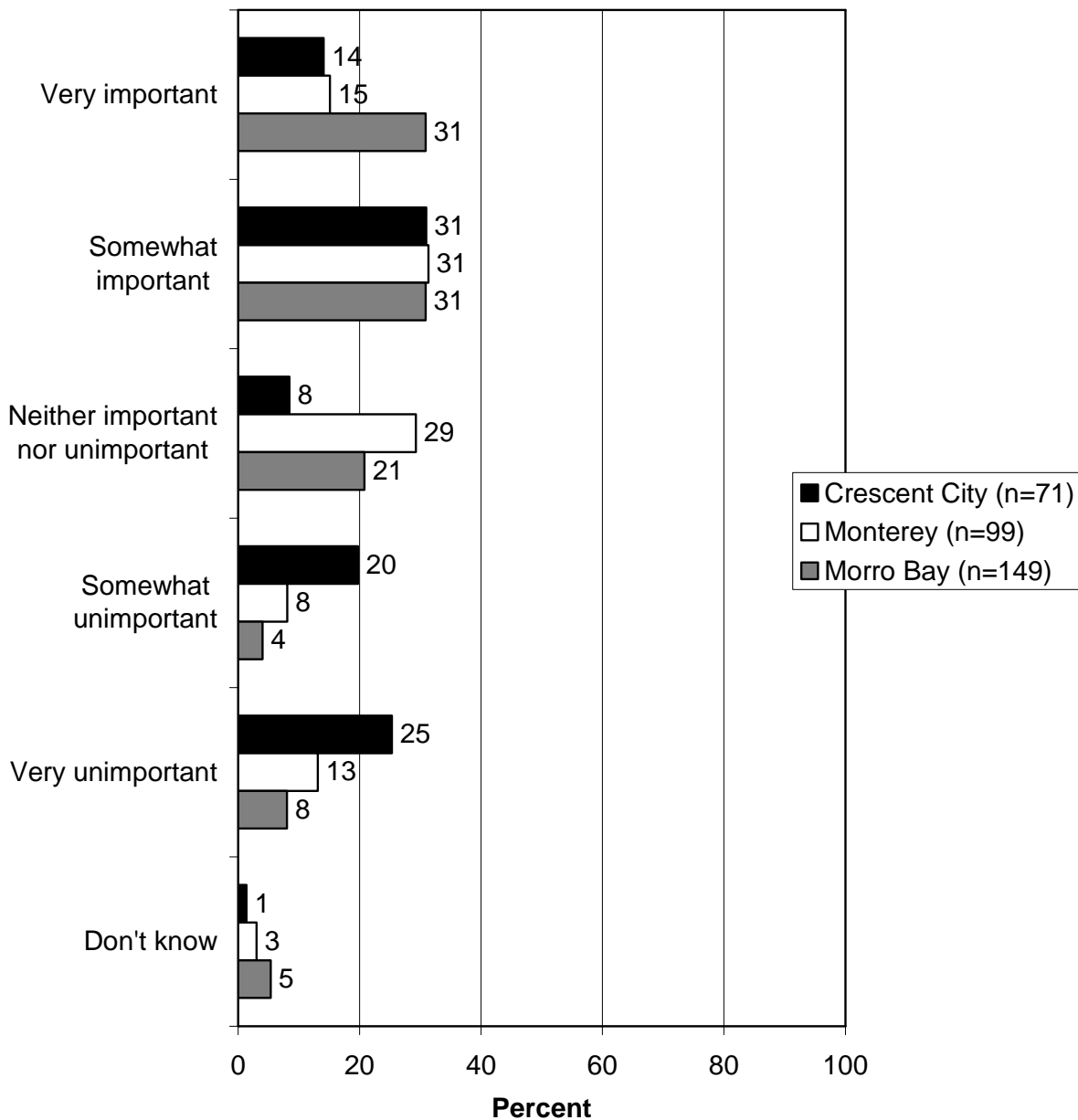
- Overwhelming majorities of visitors to the communities visited the waterfronts of those communities: 80% of Crescent City visitors, 93% of Monterey visitors, and 97% of Morro Bay visitors.

- The survey asked respondents how important in their decision to visit Crescent City, Monterey, or Morro Bay was being able to visit a working waterfront with a commercial fishing fleet. While visitors to Crescent City were evenly split (45% said it was important, and 45% said it was unimportant), visitors to Monterey and Morro Bay more often said it was important (46% of Monterey visitors; 62% of Morro Bay visitors) than unimportant (21% of Monterey visitors; 12% of Morro Bay visitors).

Q30. Have you visited the waterfront while in Monterey / Morro Bay / Crescent City in the past 2 years?



Q34. What about being able to visit a working waterfront with a commercial fishing fleet? (How important or unimportant was this when you decided to make your visit to Crescent City / Monterey / Morro Bay?)



Motivations for Visiting Crescent City, Monterey, and Morro Bay

- The survey asked about the importance of seven factors when respondents had decided to visit Crescent City, Monterey, or Morro Bay, and the items were then ranked, with the results discussed below. (For each community, four graphs are shown: the percent saying the items were *very* important, the percent saying the items were *very* or *somewhat* important, the percent saying the items were *very* or *somewhat* unimportant, and the percent saying the items were *very* unimportant. Also included is a graph showing the percentages from each community who say *very* or *somewhat* important, allowing comparisons to be made among communities.)
- Crescent City visitors as a whole place much importance on four of the seven factors: being able to access the ocean (85% say this is *very* or *somewhat* important), being able to get to an isolated, uncrowded coastal area (80%), being able to access the beach (77%), and being able to go to a good restaurant (75%). Note that the top three relate to being out in nature rather than relating to human-cultural items. Of less importance to Crescent City visitors is being able to go wildlife viewing (62%), being able to visit a working waterfront with a commercial fishing fleet (45%), and being able to get fresh local seafood (41%).
 - Monterey visitors place much importance on five of the seven items: being able to go to a good restaurant (92%), being able to access the ocean (90%), being able to access the beach (85%), being able to get to an isolated, uncrowded coastal area (82%), and being able to go wildlife viewing (80%). Of less importance to Monterey visitors as a whole are being able to get fresh local seafood (62%) and being able to visit a working waterfront with a commercial fishing fleet (46%). Unlike Crescent City visitors, Monterey visitors place more emphasis on at least one human-cultural item: restaurants.
 - Morro Bay visitors are more like Monterey visitors than Crescent City visitors. Morro Bay visitors place the most emphasis on the same five items (albeit in a slightly different order) that Monterey visitors do: being able to go to a good restaurant (91%), being able to get to an isolated, uncrowded coastal area (89%), being able to access the beach (88%), being able to access the ocean (87%), and being able to go wildlife viewing (79%). Of less importance to Morro Bay visitors as a whole are being able to get fresh local seafood (70%) and being able to visit a working waterfront with a commercial

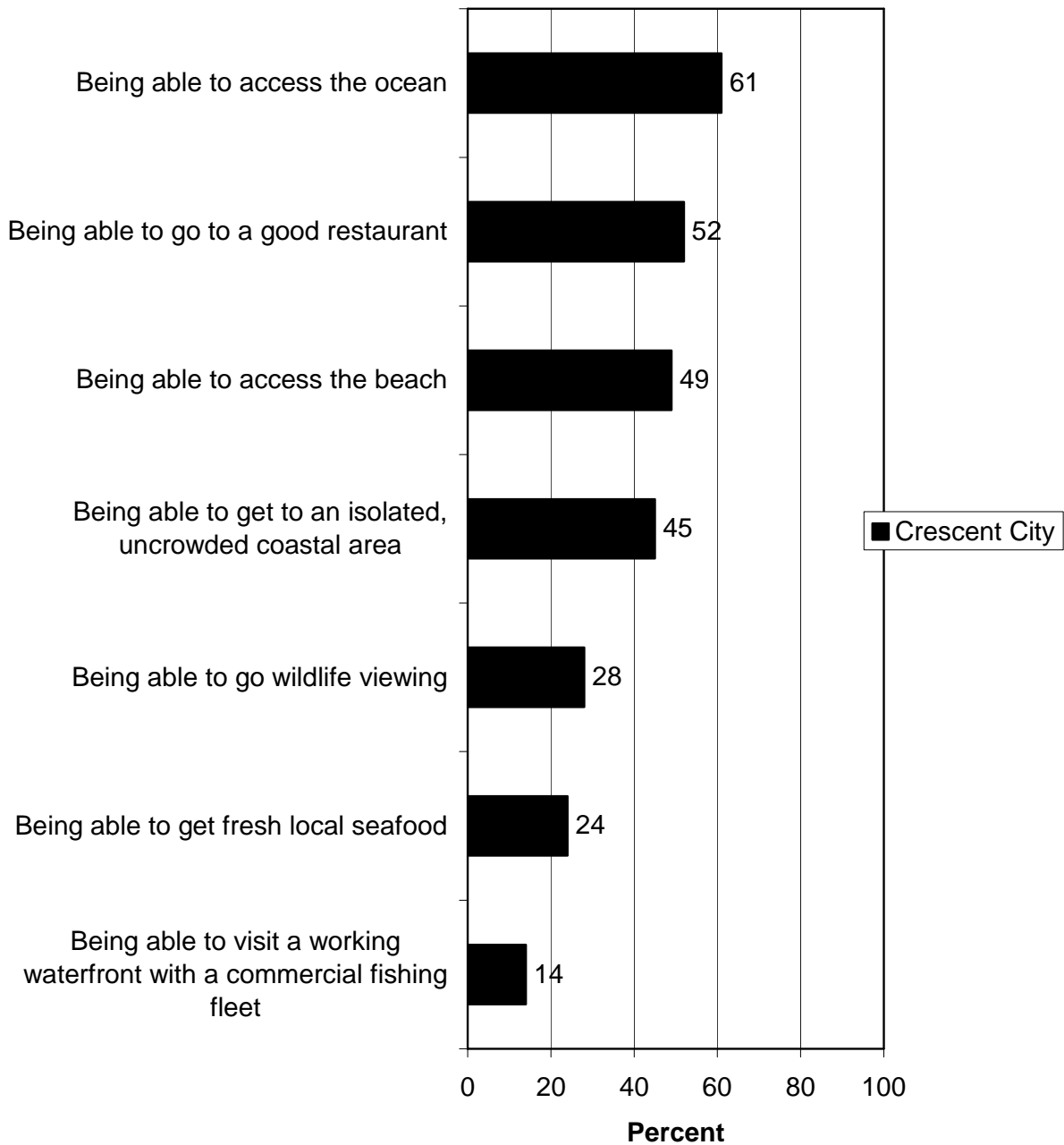
fishing fleet (62%). Again, unlike Crescent City visitors, Morro Bay visitors place more emphasis on at least one human-cultural item: restaurants.

- The survey asked respondents whether they agree or disagree with nine statements pertaining to tourism and visiting coastal communities, and then all nine statements were ranked. For each community, the top-ranked item is “A community’s culture, such as its identity as a fishing village, is worth preserving” (from 86% to 93% agree). Also in common among visitors to each of the communities is that low down on the ranking are “I often go on day trips to the coast” (39% of Crescent City visitors; 66% of Monterey visitors; and 64% of Morro Bay visitors) and “I would be more likely to go to a community that has a working waterfront with a commercial fishing fleet than to one that does not have a commercial fishing fleet” (56% of Crescent City visitors; 52% of Monterey visitors; and 64% of Morro Bay visitors). (For each community, four graphs are shown: the percent *strongly* agreeing, the percent *strongly* or *moderately* agreeing, the percent *strongly* or *moderately* disagreeing, and the percent *strongly* disagreeing. Also included is a graph showing the percent *strongly* or *moderately* agreeing for all communities together, allowing a comparison.)
 - Among Crescent City visitors, the most agreement is for the statement, “A community’s culture, such as its identity as a fishing village, is worth preserving” (92% agree). Three more items are grouped, all with 75% agreeing: “Sometimes I seek out restaurants specifically for seafood,” “I enjoy seeing and visiting working waterfronts when I’m along the coast,” and “I would be more likely to go to a community where I could get fresh local seafood than to a coastal community where I could not get fresh local seafood.” At the bottom of the ranking among Crescent City visitors are “Sometimes I seek out restaurants specifically for seafood in Crescent City” (48% agree) and “I often go on day trips to the coast” (39%).
 - Among Monterey visitors, the top item is “A community’s culture, such as its identity as a fishing village, is worth preserving” (86% agree). After that, all items are fairly uniform with no large gaps from one item to the next, all within the range of 80% to 66% in agreement, with the exception of the lowest ranked item at 52% agreement: “I would be more likely to go to a community that has a working waterfront with a commercial fishing fleet than to one that does not have a commercial fishing fleet.”

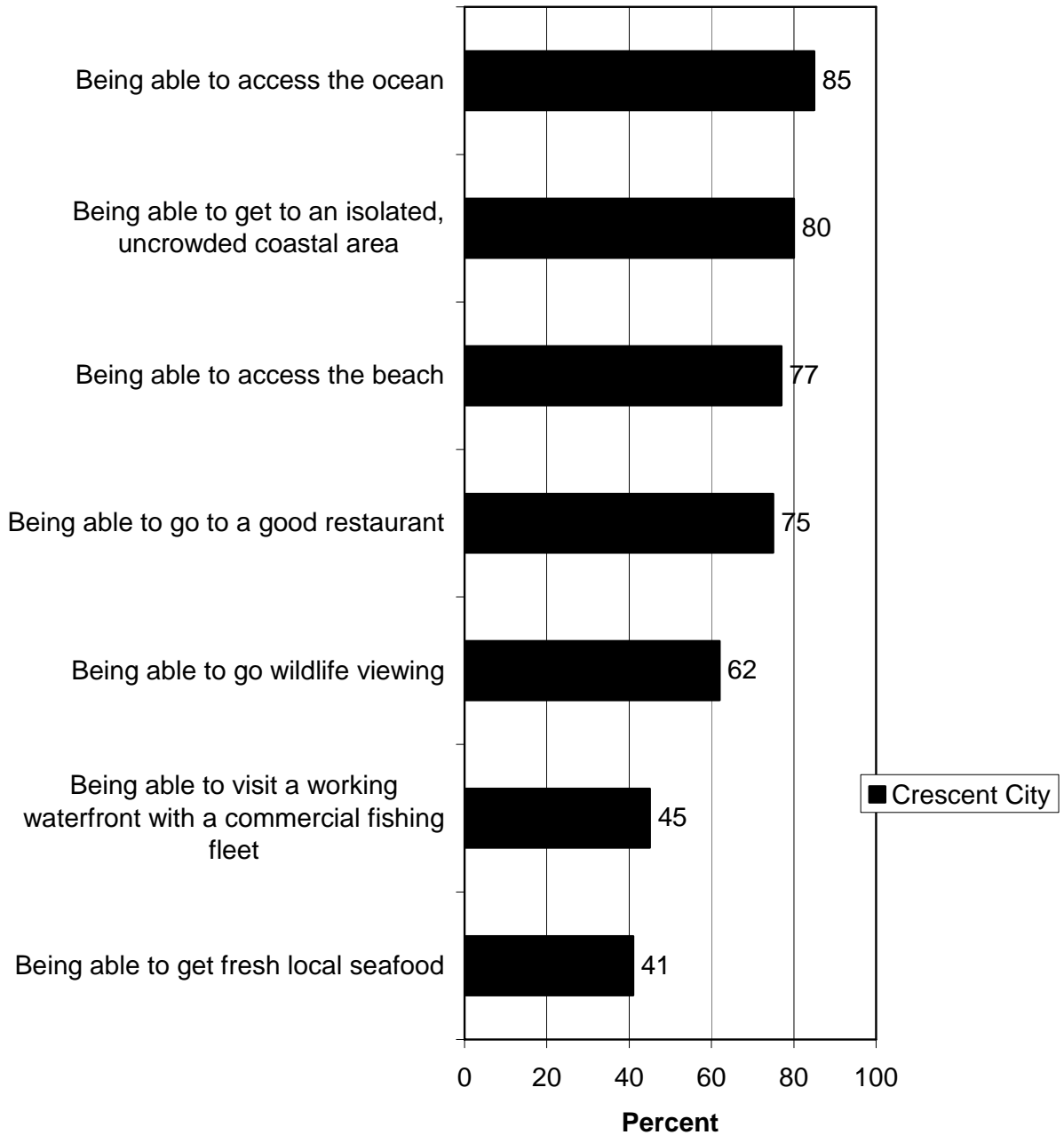
- Among Morro Bay visitors, two items are grouped at the top: “A community’s culture, such as its identity as a fishing village, is worth preserving” (93% agree) and “When I go to Morro Bay, I like seeing the fishing boats” (88%). After that, all items but two are closely grouped within the range of 81% to 77%. The bottom items are “I would be more likely to go to a community that has a working waterfront with a commercial fishing fleet than to one that does not have a commercial fishing fleet” (64% agree) and “I often go on day trips to the coast” (also 64%).
- Some notable differences occur from one community to the next.
 - Monterey and Morro Bay visitors are much more likely than are Crescent City visitors to agree with the statement, “I often go on day trips to the coast.”
 - Monterey and Morro Bay visitors are much more likely than are Crescent City visitors to agree with the statement, “Sometimes I seek out restaurants specifically for seafood in Crescent City/Monterey/Morro Bay” (note that the survey asked only about the one specific community the respondent had visited).
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing the fishing boats” (again, note that the survey asked only about the one specific community the respondent had visited).
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing waterfront activities, like fresh seafood being unloaded” (as with the above, the survey asked only about the one specific community the respondent had visited).
 - On all other statements, the percentages in agreement were about the same.
- The survey asked respondents who indicated that they often go on day trips to the coast for their motivations for going on day trips to the coast. Among visitors to each of the communities, enjoying the coastal scenery is an important reason for visiting the community. Also important are relaxing/getting away and seeing coastal wildlife. Of moderate importance are eating fresh seafood, being with family, and seeing a working waterfront.

- For some visitors, fishing is a motivation for visiting Crescent City, Monterey, or Morro Bay (particularly Morro Bay): 7% of visitors to Crescent City fished near there, 10% of visitors to Monterey fished near there, and 26% of visitors to Morro Bay fished near there. (This graph is shown in the section of this report titled, “ Opinions on Recreational Fishing.”)

Percent who indicated that the following things were very important in his/her decision to visit Crescent City.



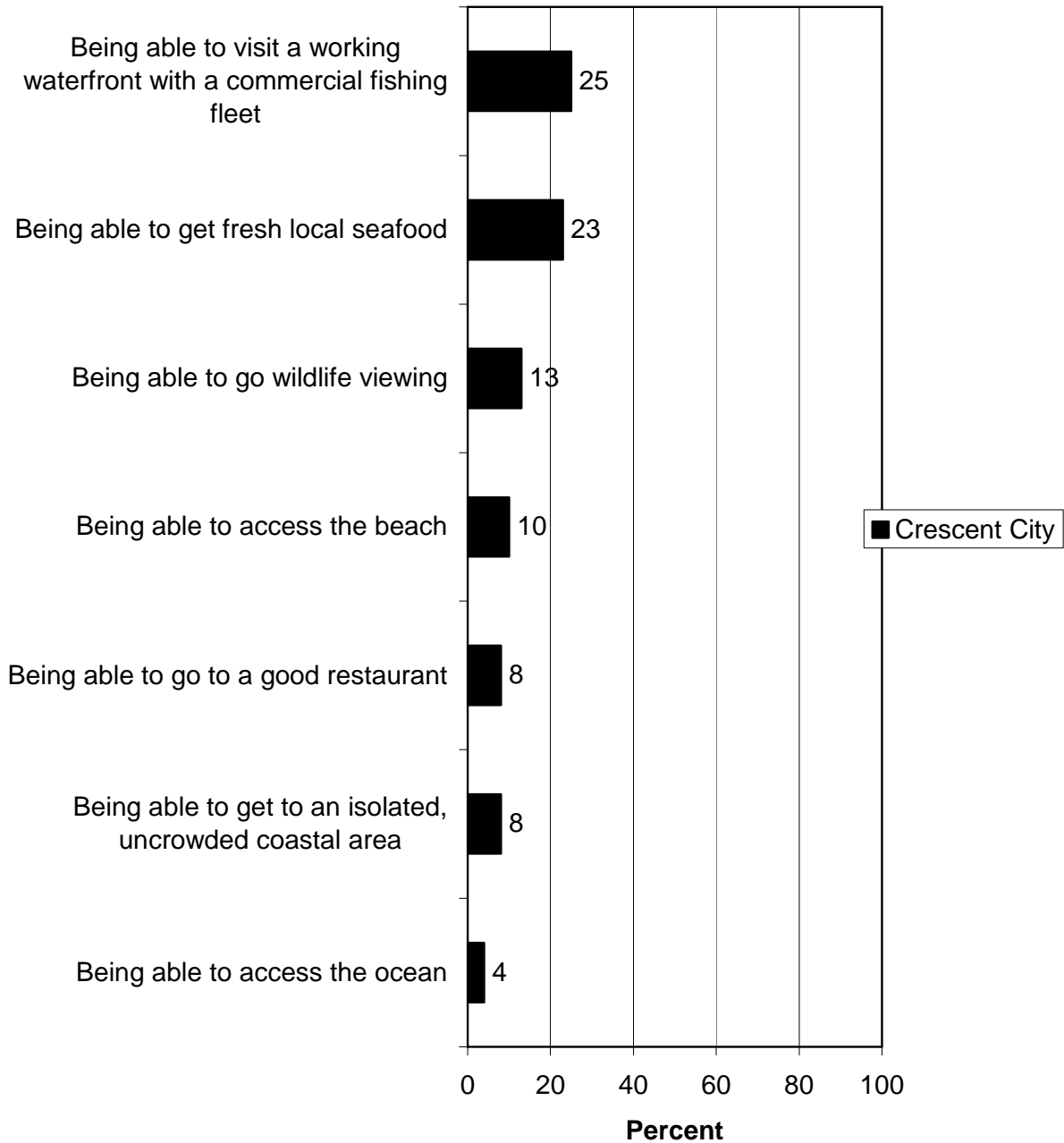
Percent who indicated that the following things were very or somewhat important in his/her decision to visit Crescent City.



Percent who indicated that the following things were somewhat or very unimportant in his/her decision to visit Crescent City.



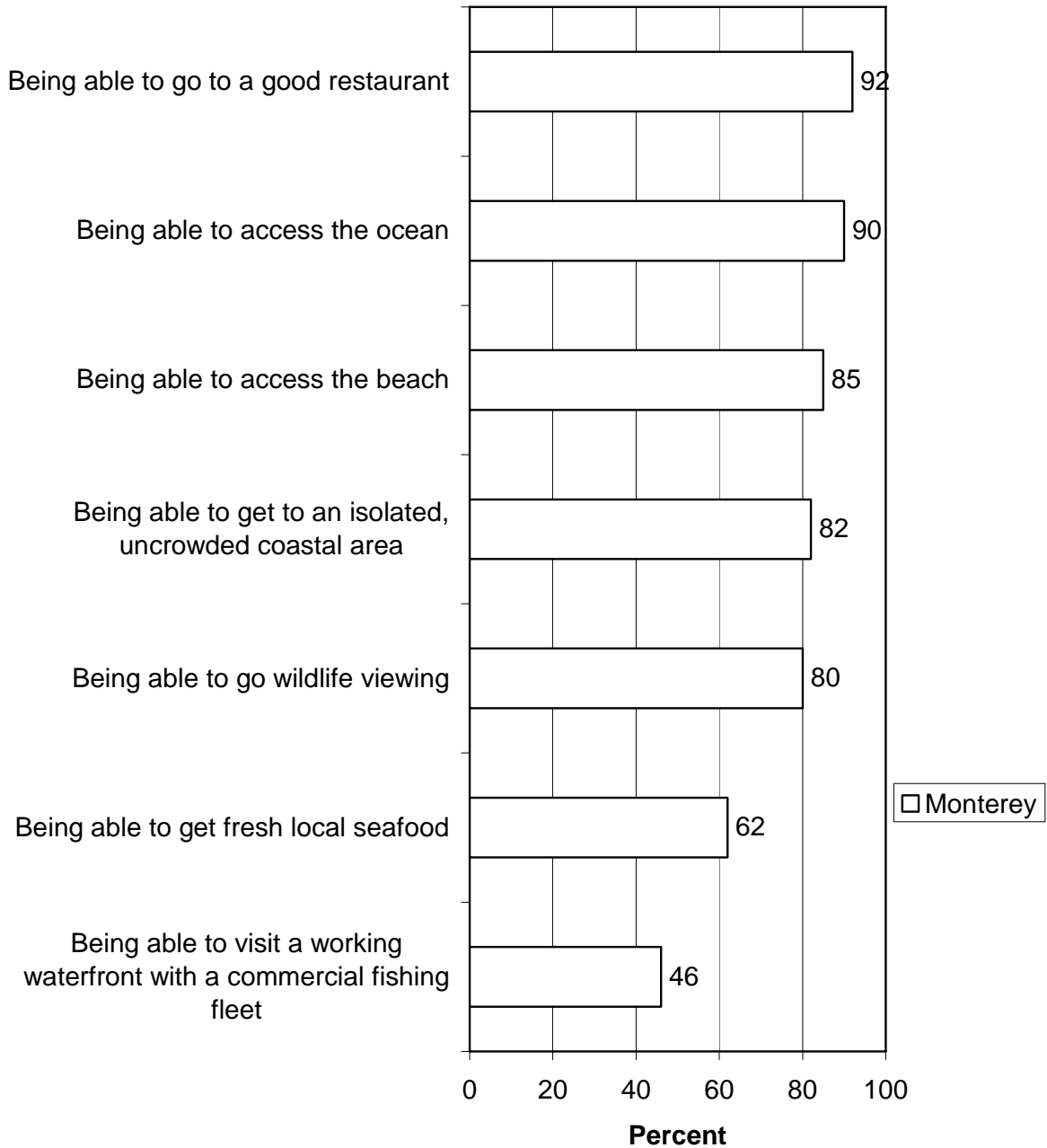
**Percent who indicated that the following things
were very unimportant in his/her decision to visit
Crescent City.**



Percent who indicated that the following things were very important in his/her decision to visit Monterey.



Percent who indicated that the following things were very or somewhat important in his/her decision to visit Monterey.



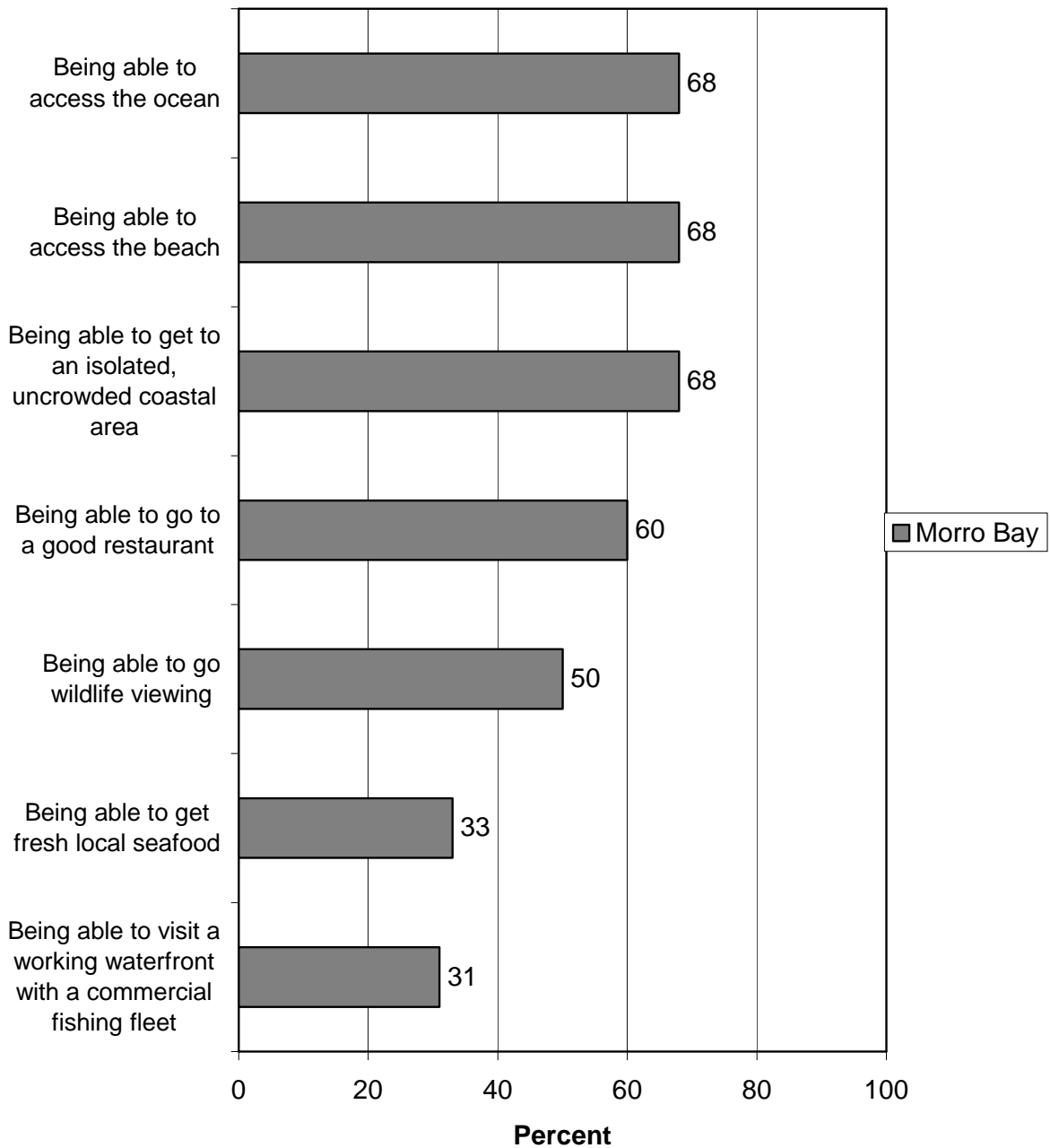
Percent who indicated that the following things were somewhat or very unimportant in his/her decision to visit Monterey.



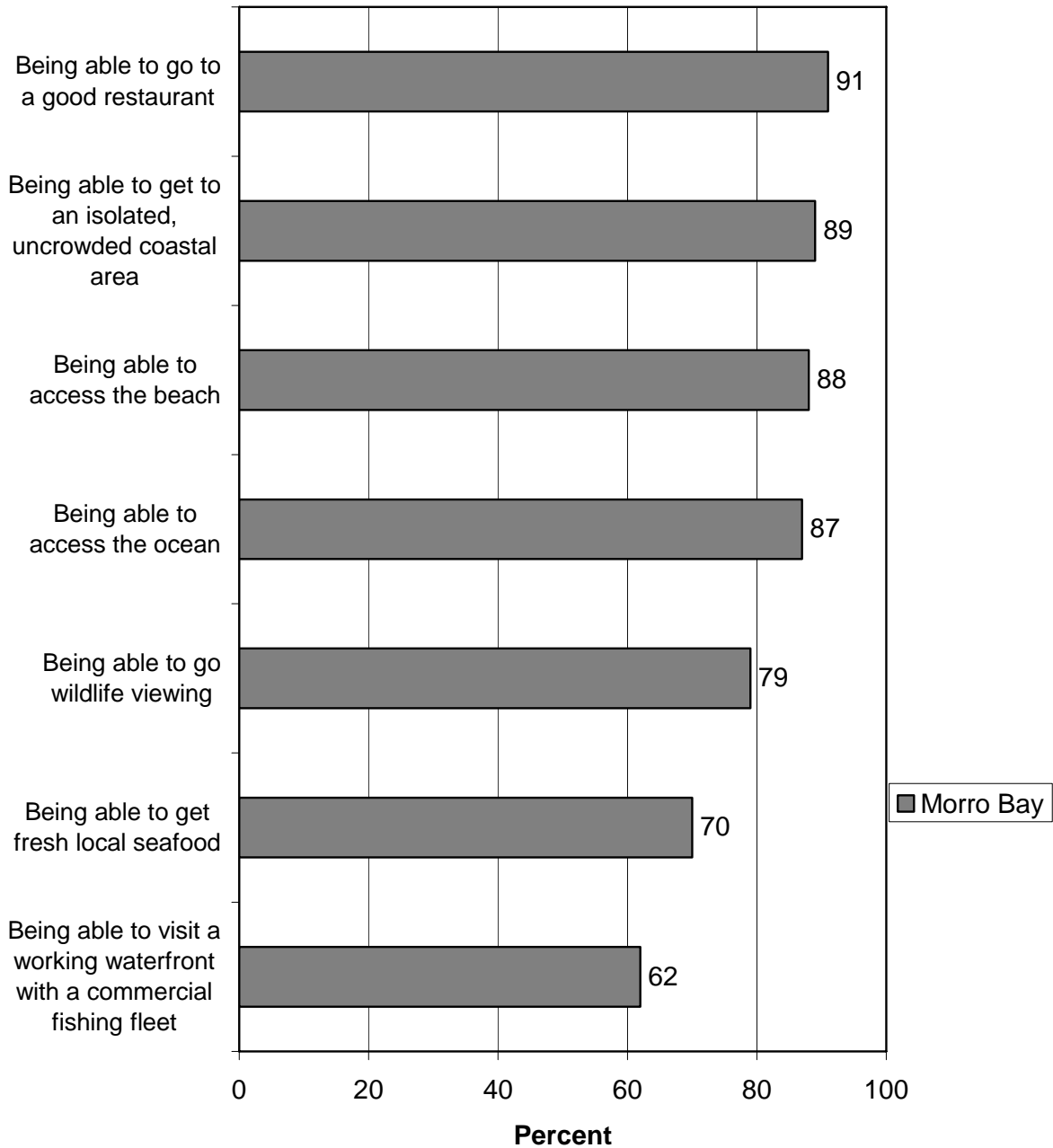
**Percent who indicated that the following things
were very unimportant in his/her decision to visit
Monterey.**



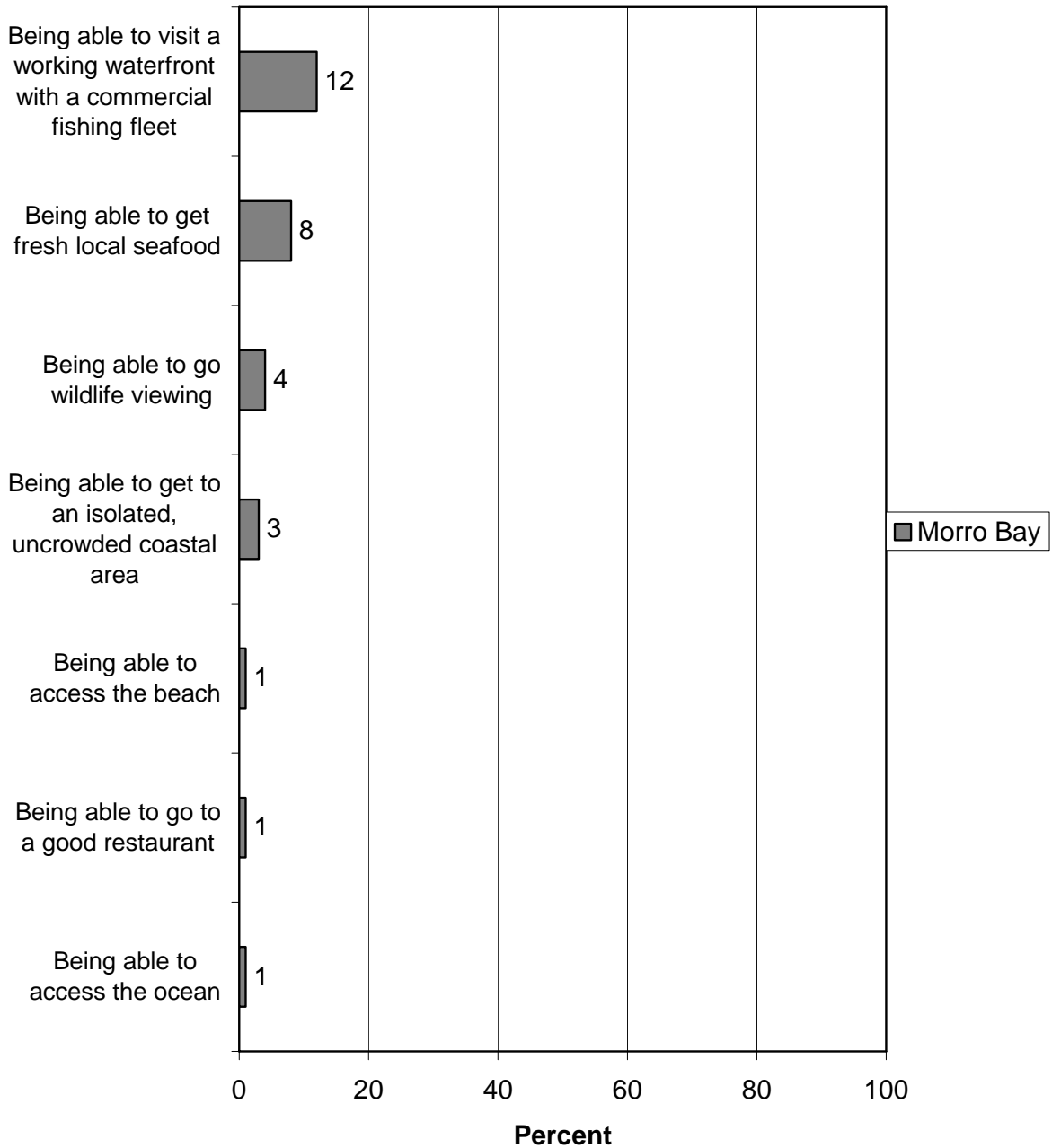
Percent who indicated that the following things were very important in his/her decision to visit Morro Bay.



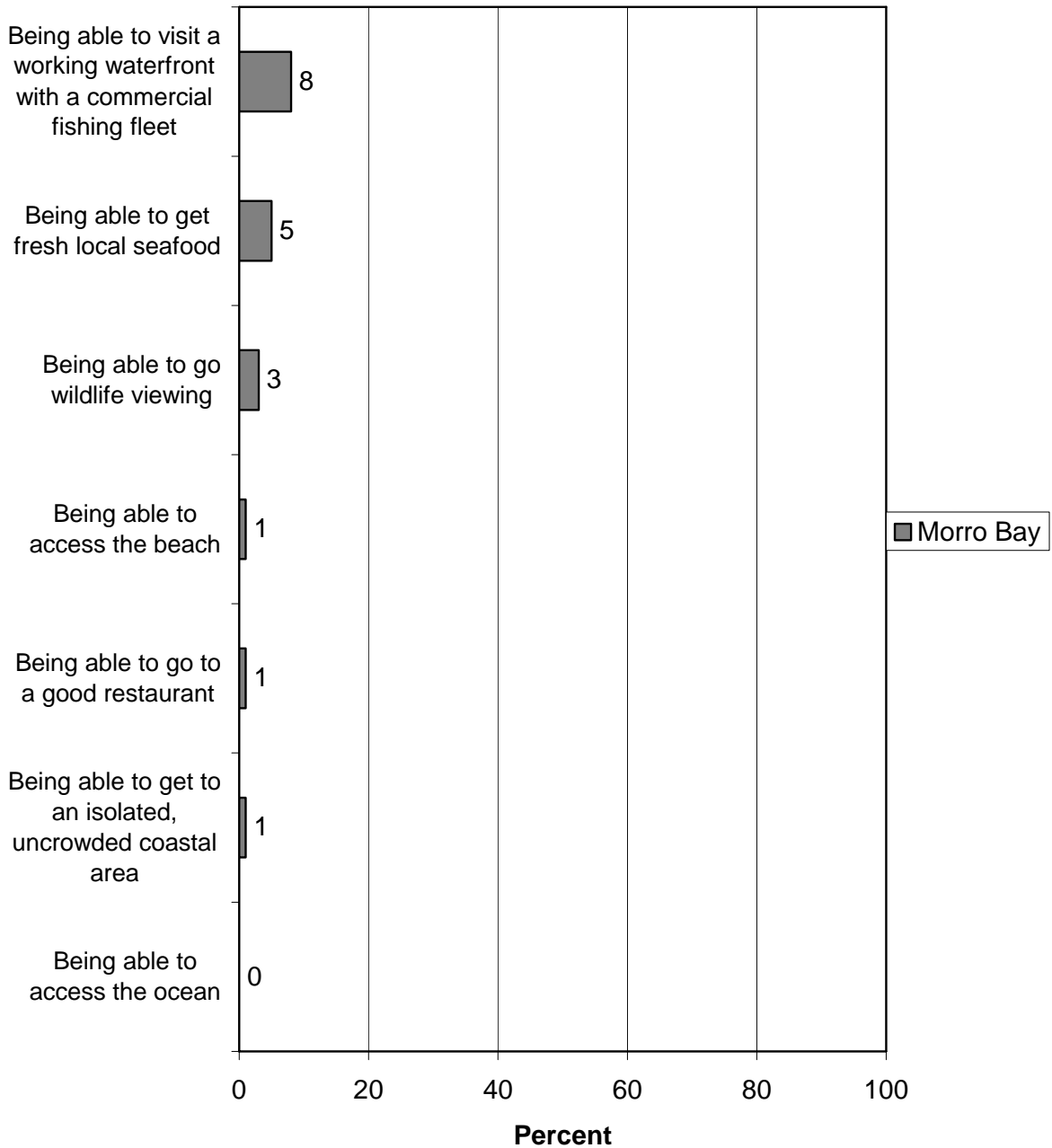
Percent who indicated that the following things were very or somewhat important in his/her decision to visit Morro Bay.



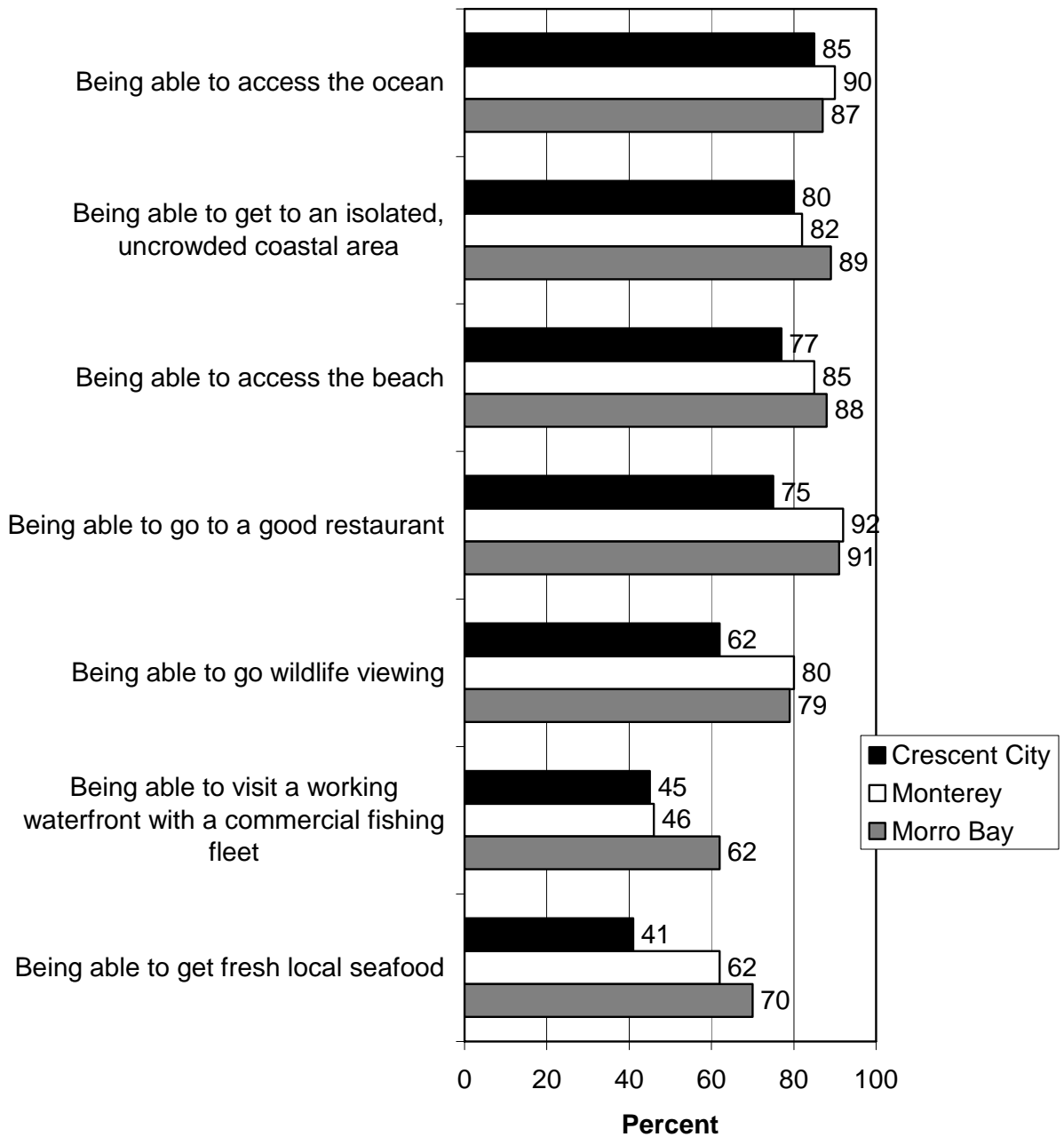
Percent who indicated that the following things were somewhat or very unimportant in his/her decision to visit Morro Bay.



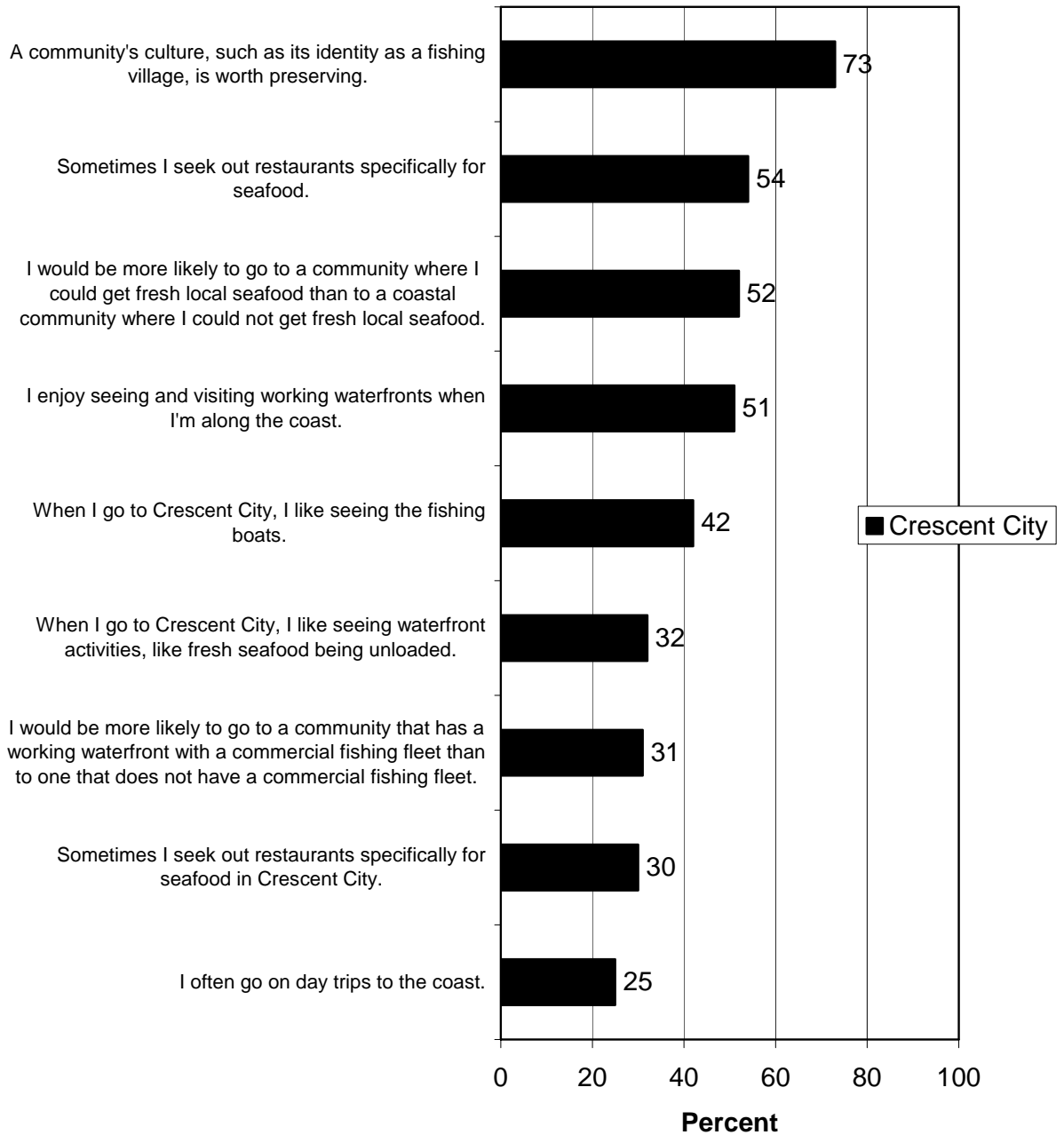
**Percent who indicated that the following things
were very unimportant in his/her decision to visit
Morro Bay.**



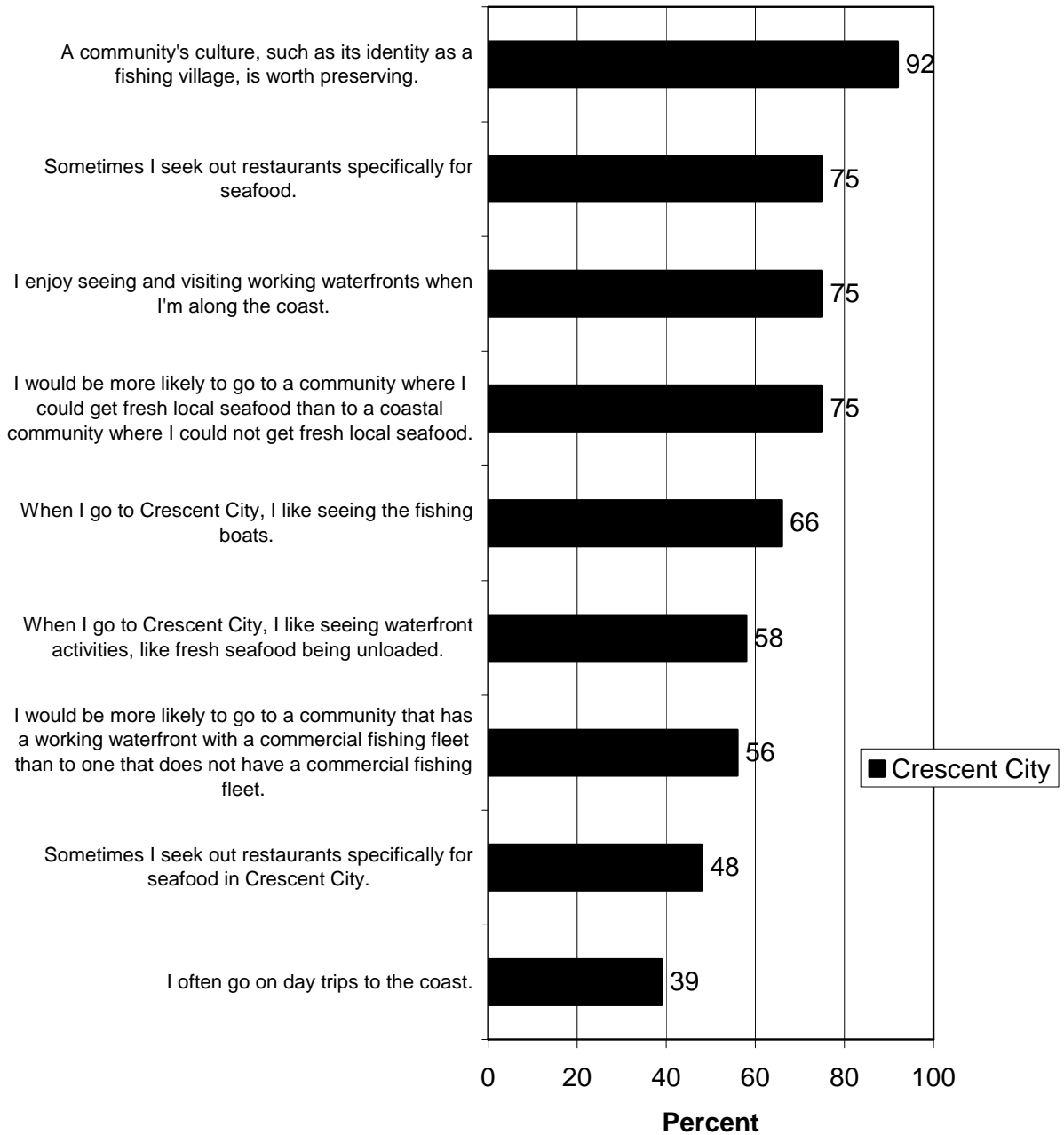
Percent who indicated that the following things were very or somewhat important in his/her decision to visit Monterey / Morro Bay / Crescent City.



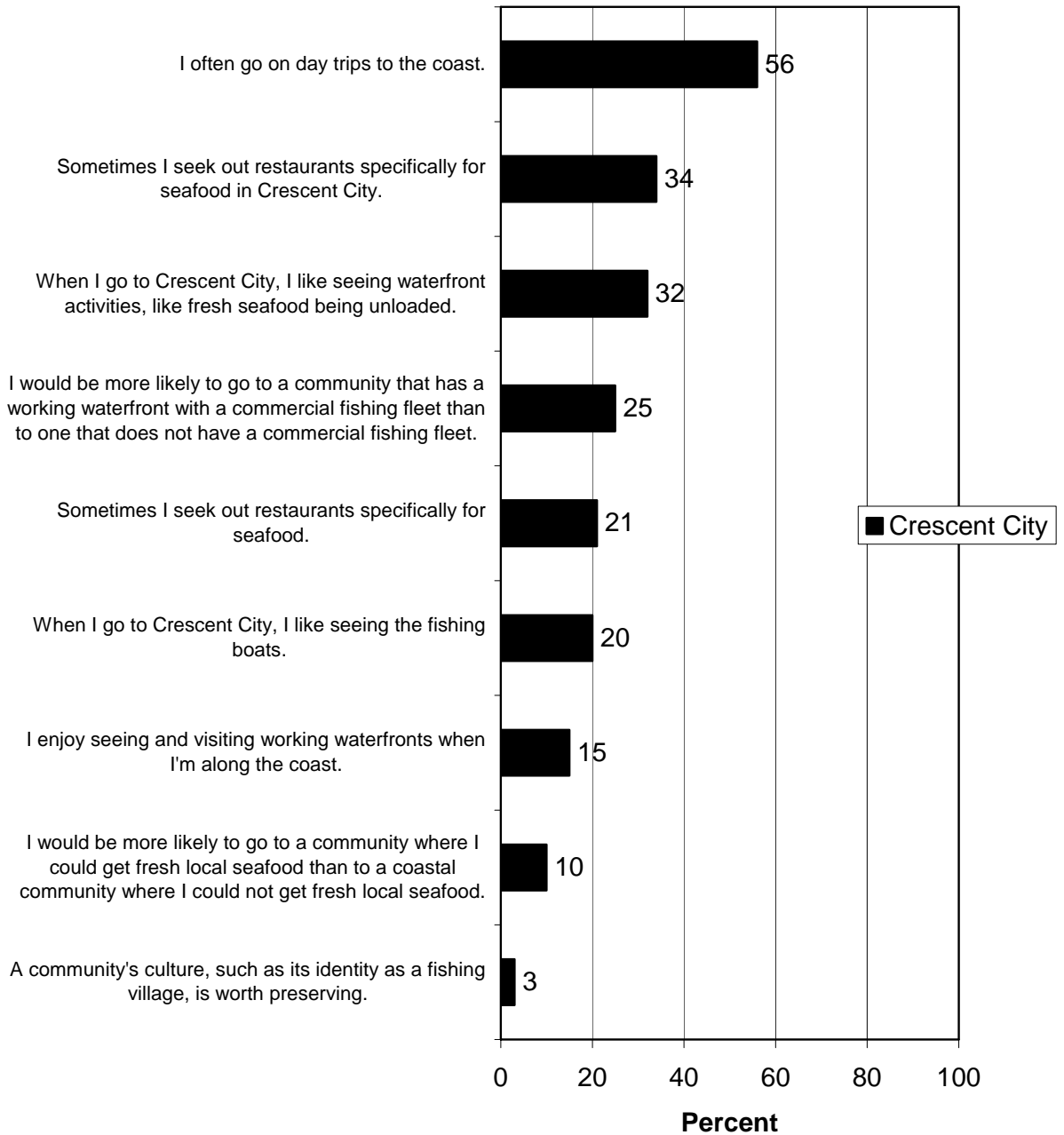
Percent who strongly agree with the following statements on tourism and town visits.



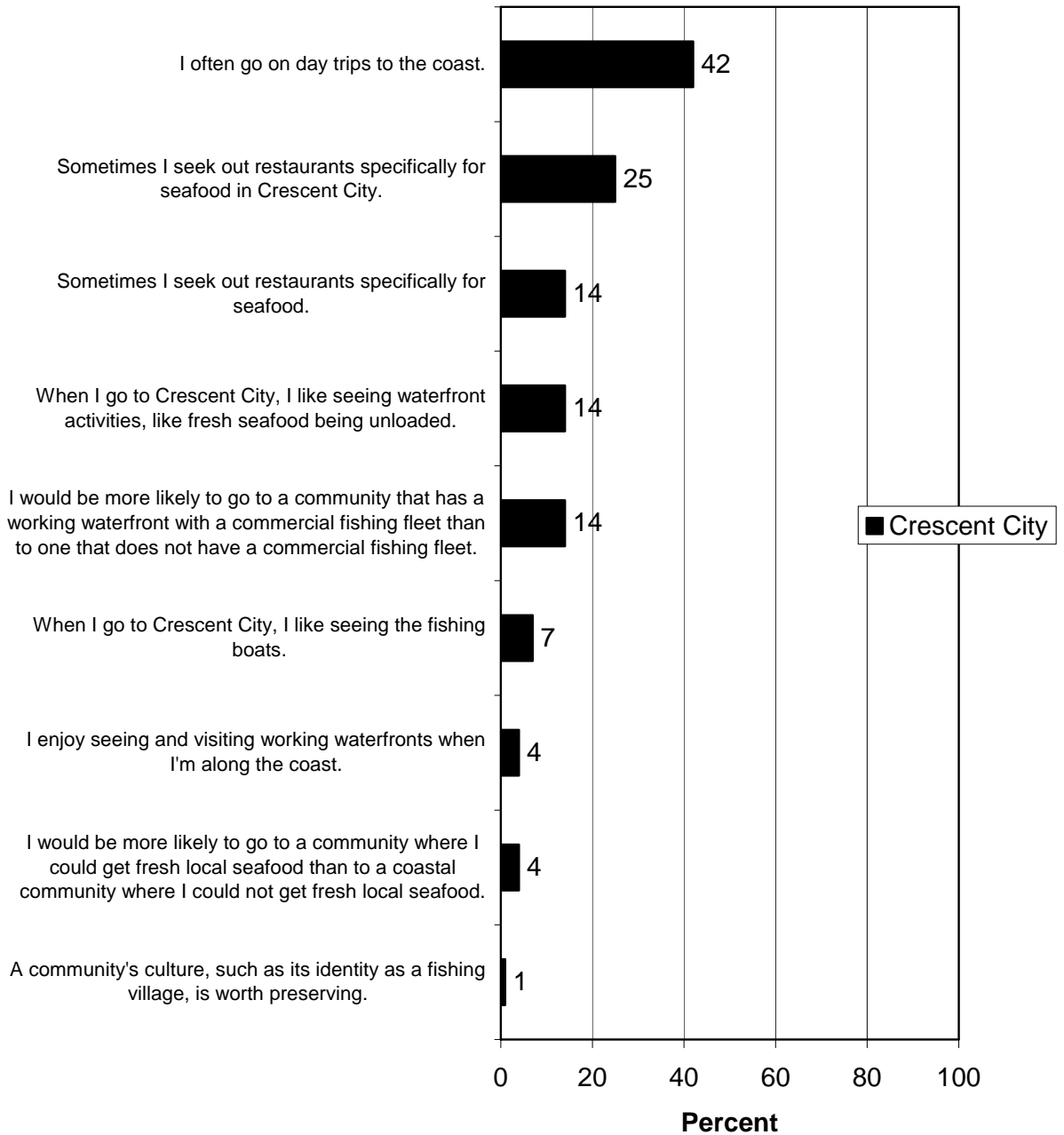
Percent who strongly or moderately agree with the following statements on tourism and town visits.



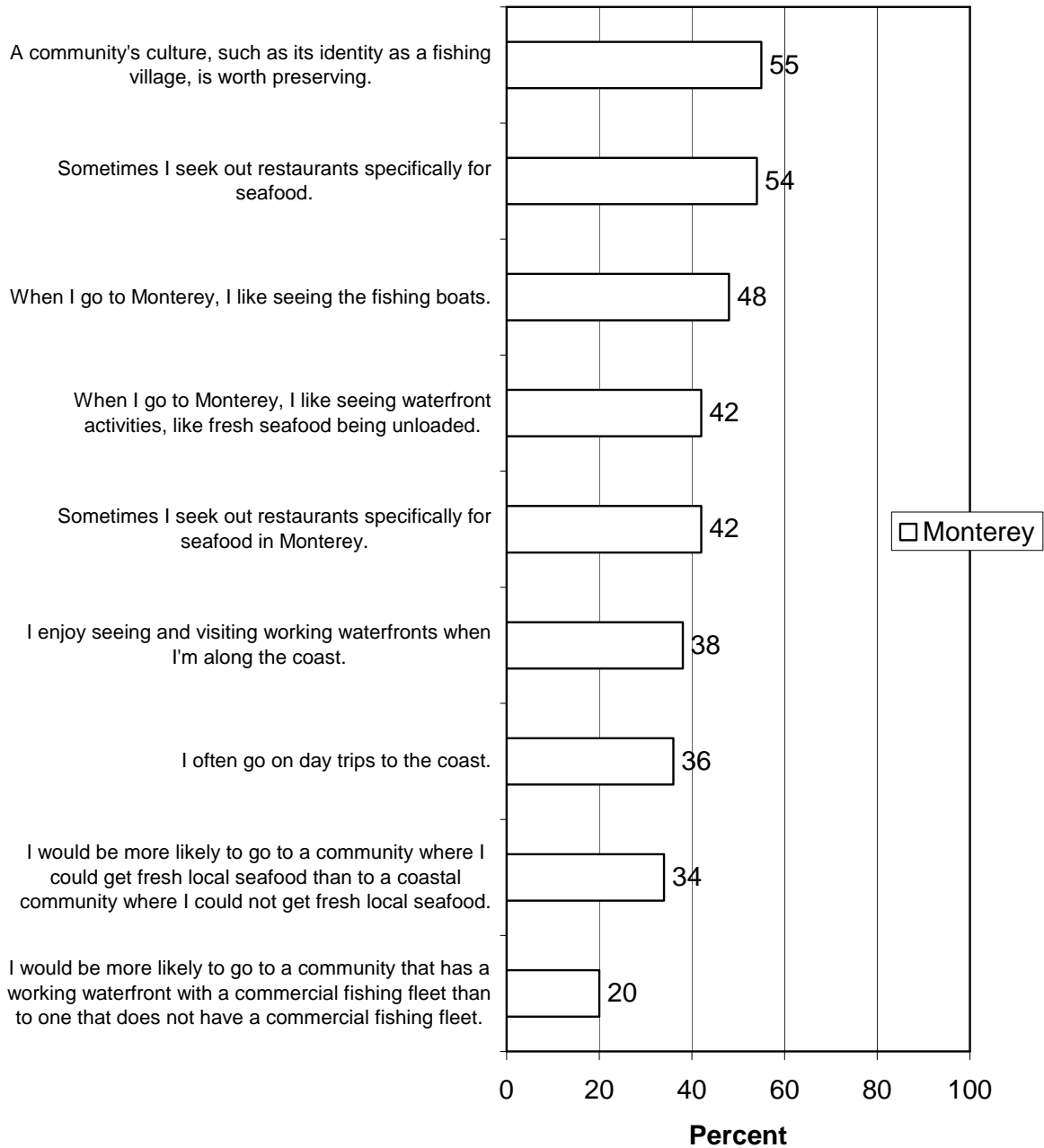
Percent who moderately or strongly disagree with the following statements on tourism and town visits.



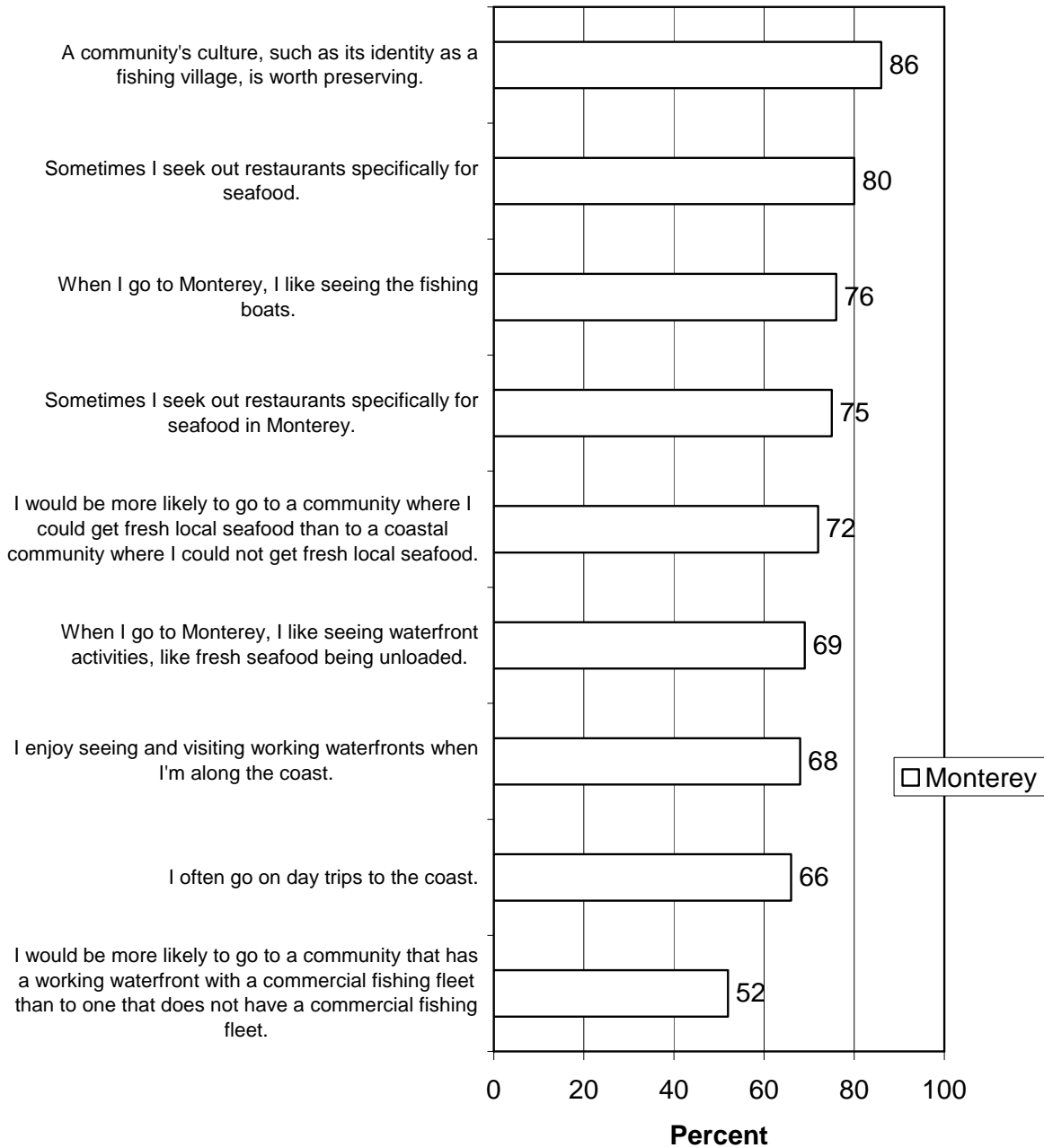
Percent who strongly disagree with the following statements on tourism and town visits.



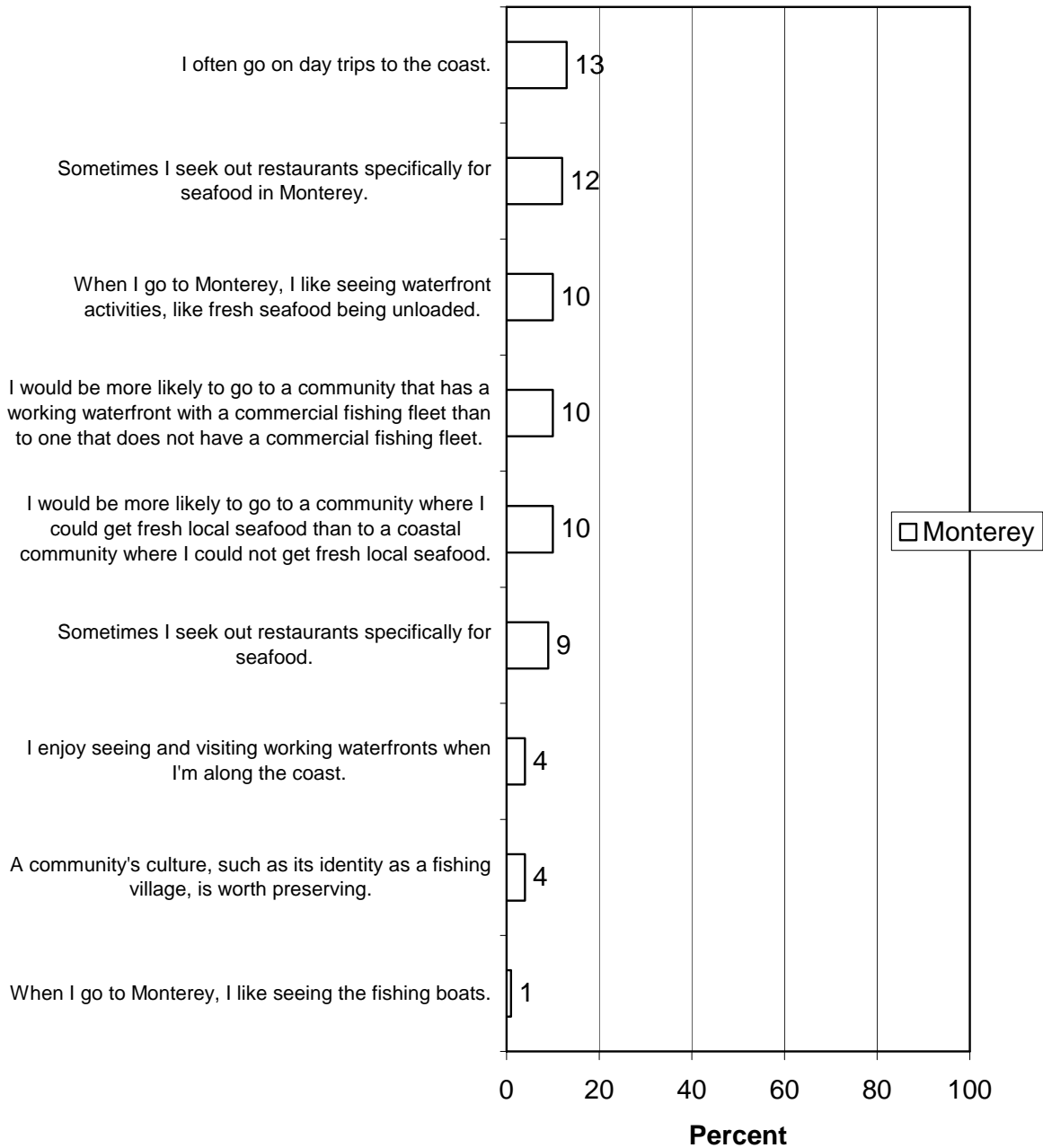
Percent who strongly agree with the following statements on tourism and town visits.



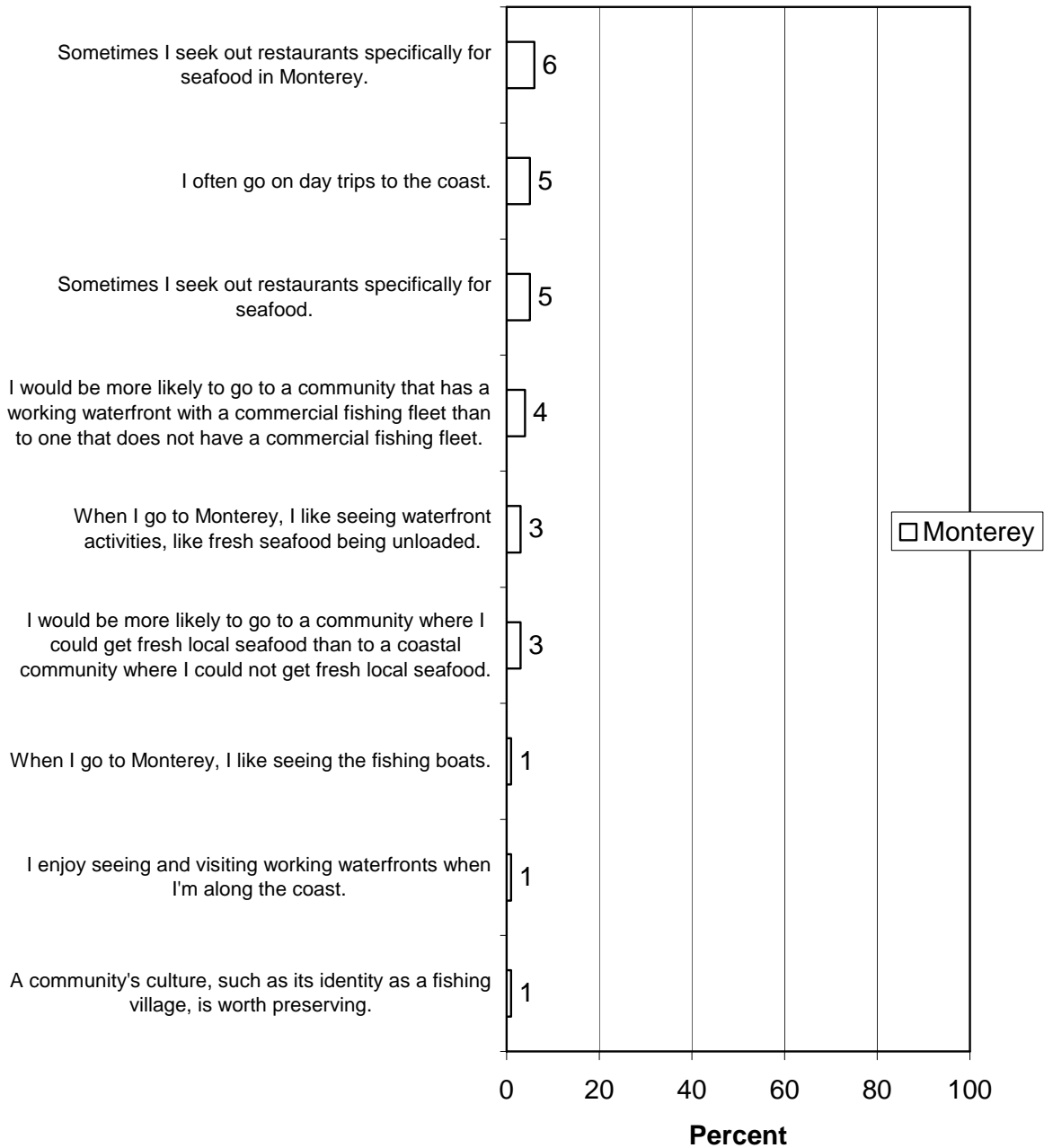
Percent who strongly or moderately agree with the following statements on tourism and town visits.



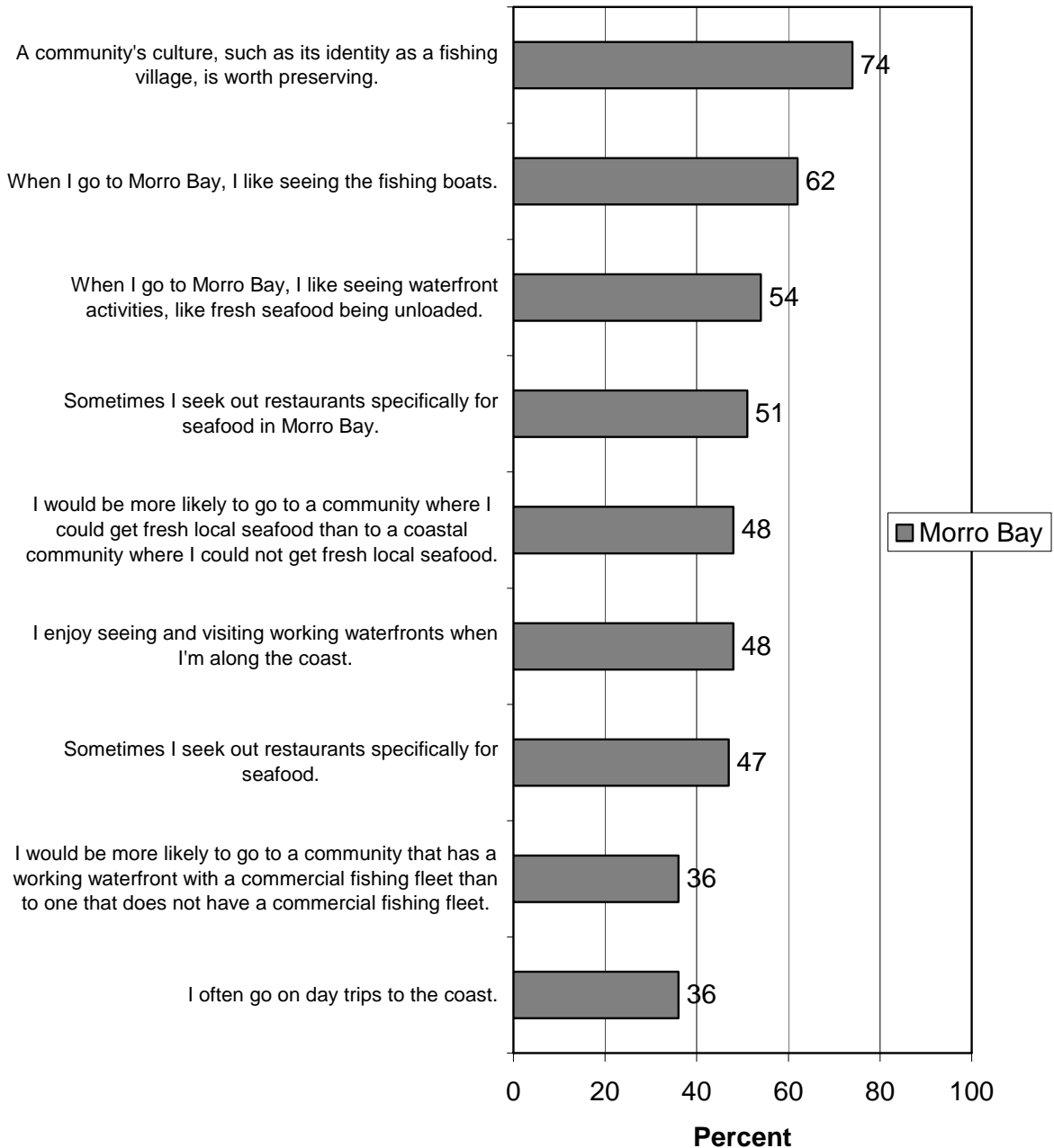
**Percent who moderately or strongly disagree with
the following statements on tourism and town
visits.**



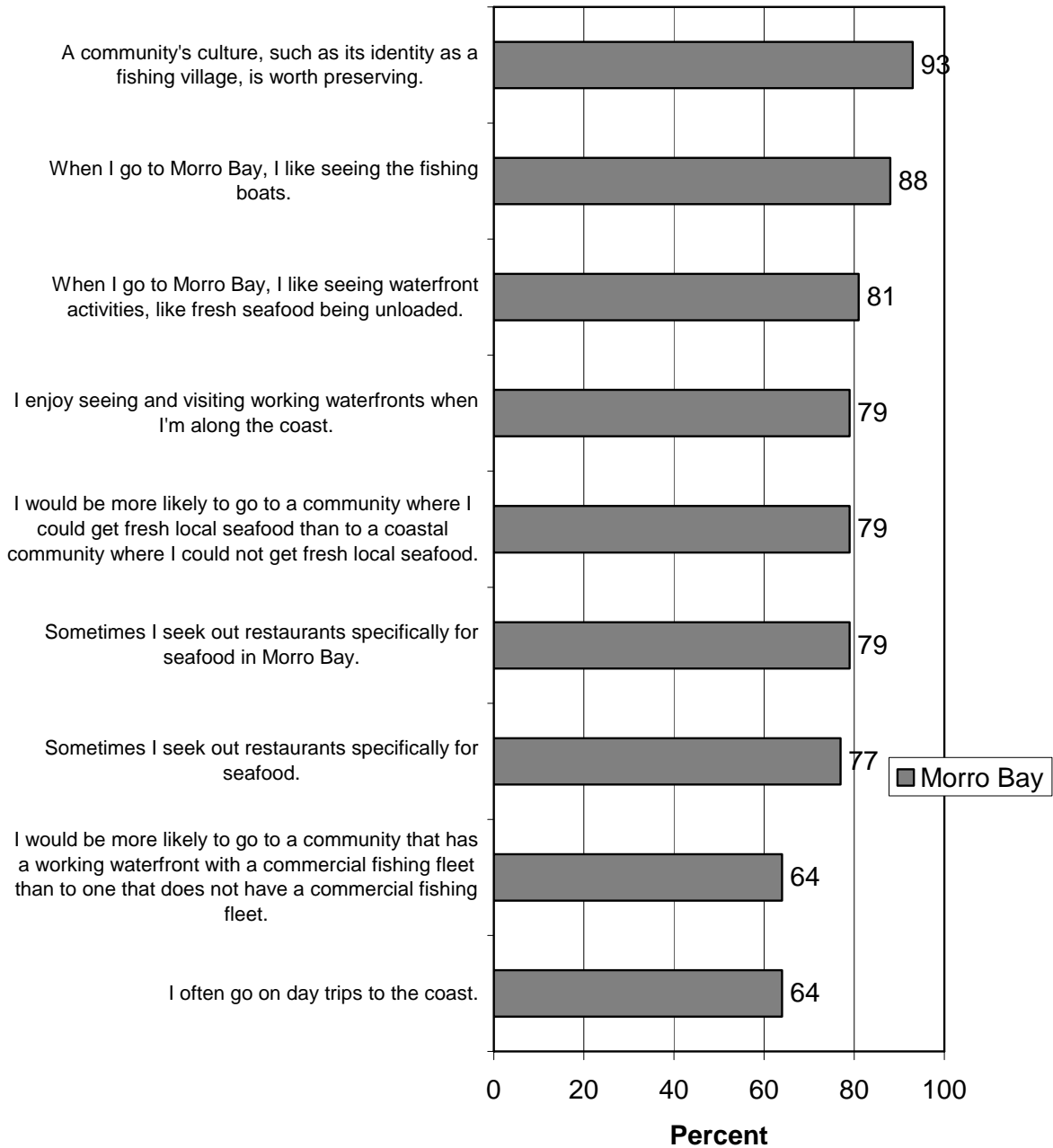
Percent who strongly disagree with the following statements on tourism and town visits.



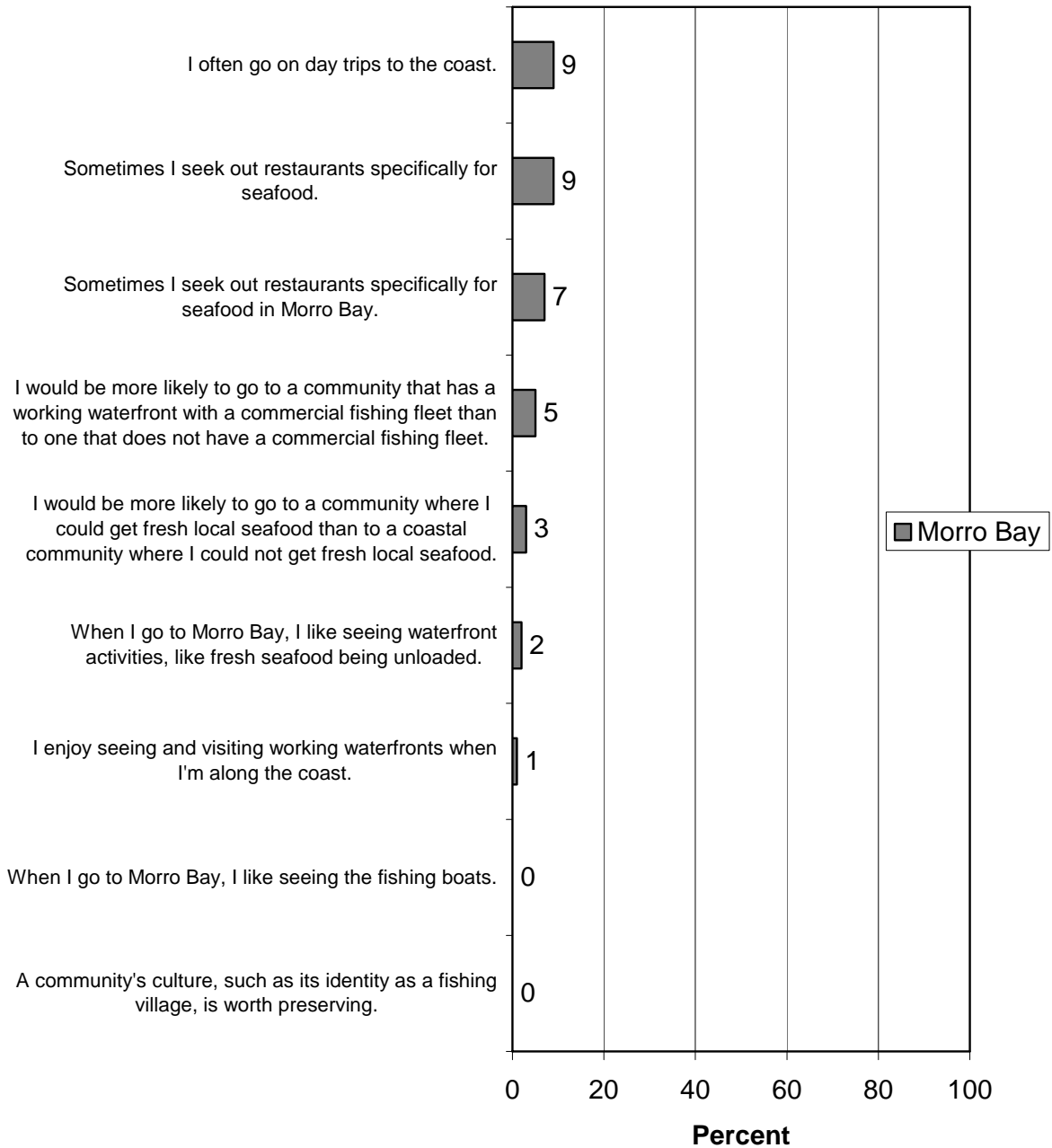
Percent who strongly agree with the following statements on tourism and town visits.



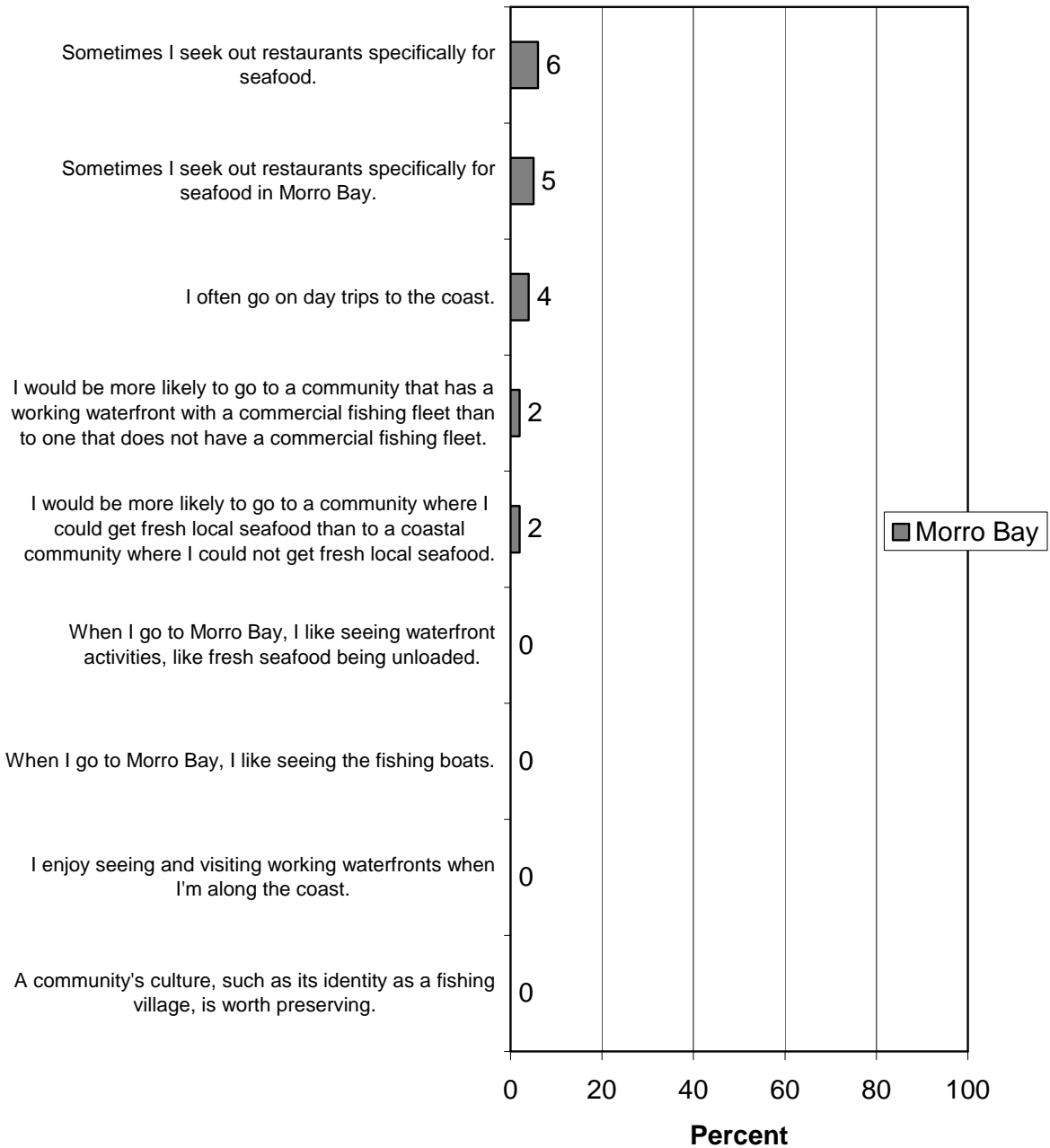
Percent who strongly or moderately agree with the following statements on tourism and town visits.



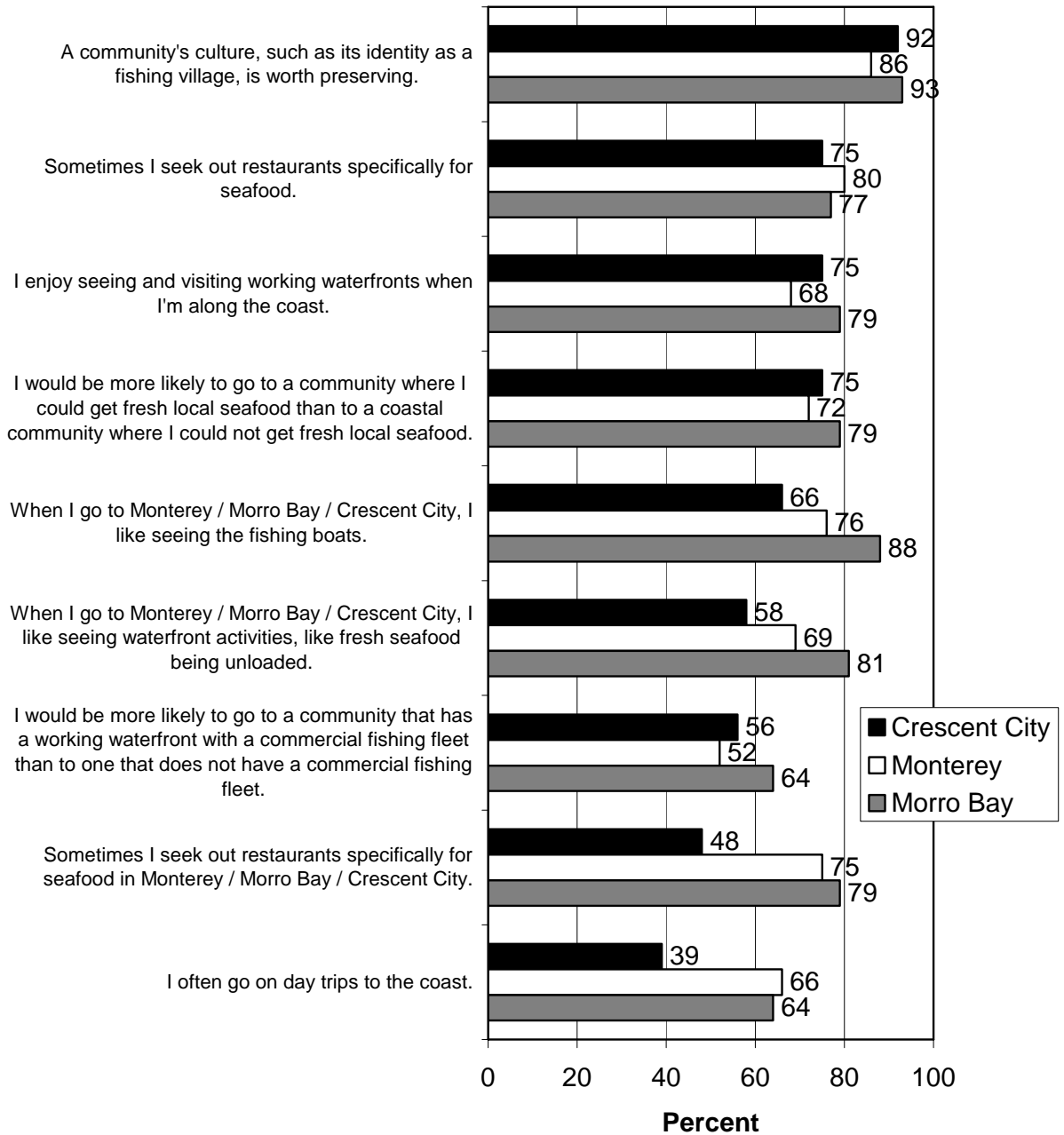
Percent who moderately or strongly disagree with the following statements on tourism and town visits.



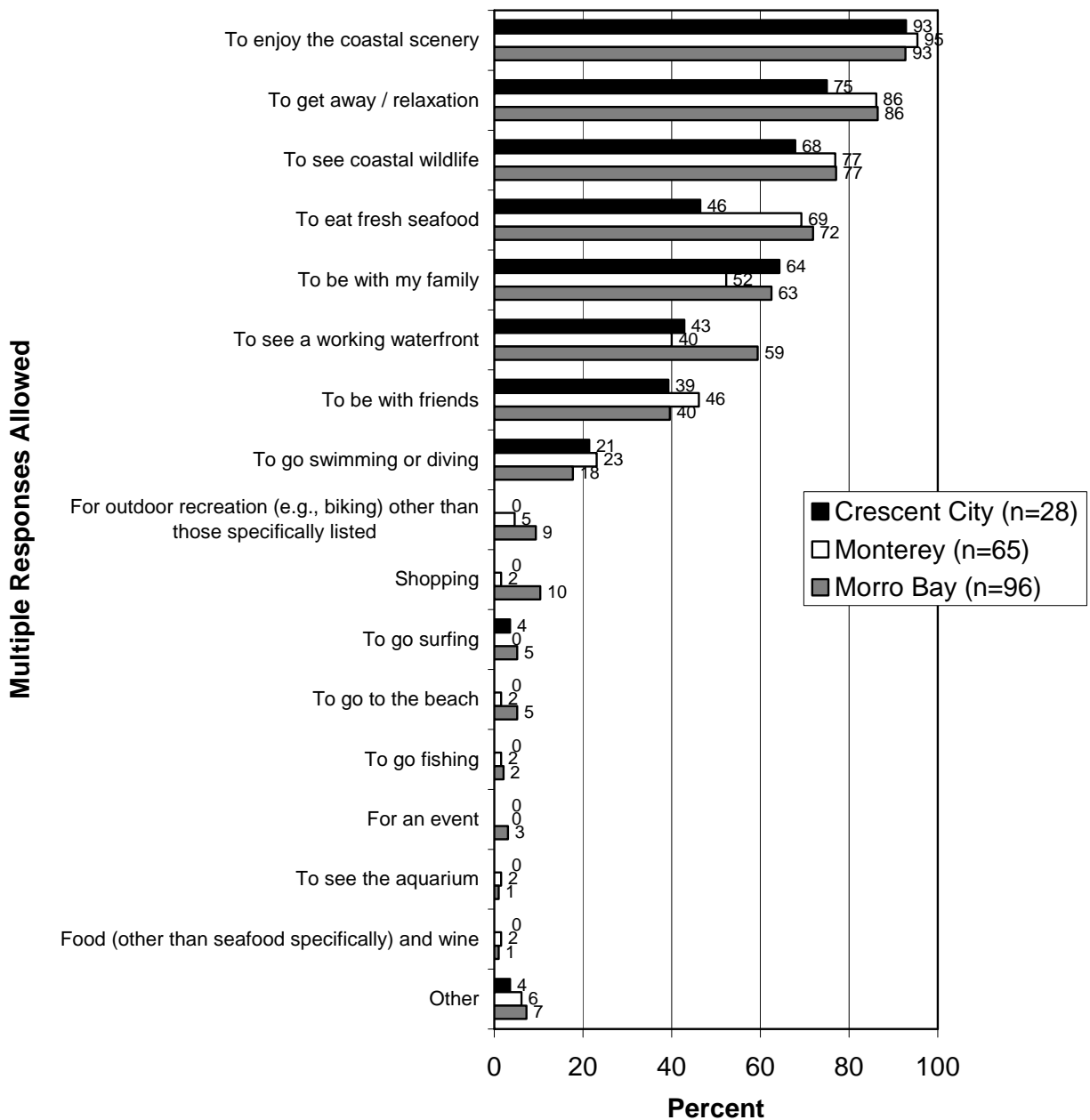
Percent who strongly disagree with the following statements on tourism and town visits.



Percent who strongly or moderately agree with the following statements on tourism and town visits.



Q79. You indicated that you often go on day trips to the coast. Please indicate if each is a reason that you visit the coast for a day. (Asked of those who often go on day trips to the coast.)



CONSUMPTION OF SEAFOOD

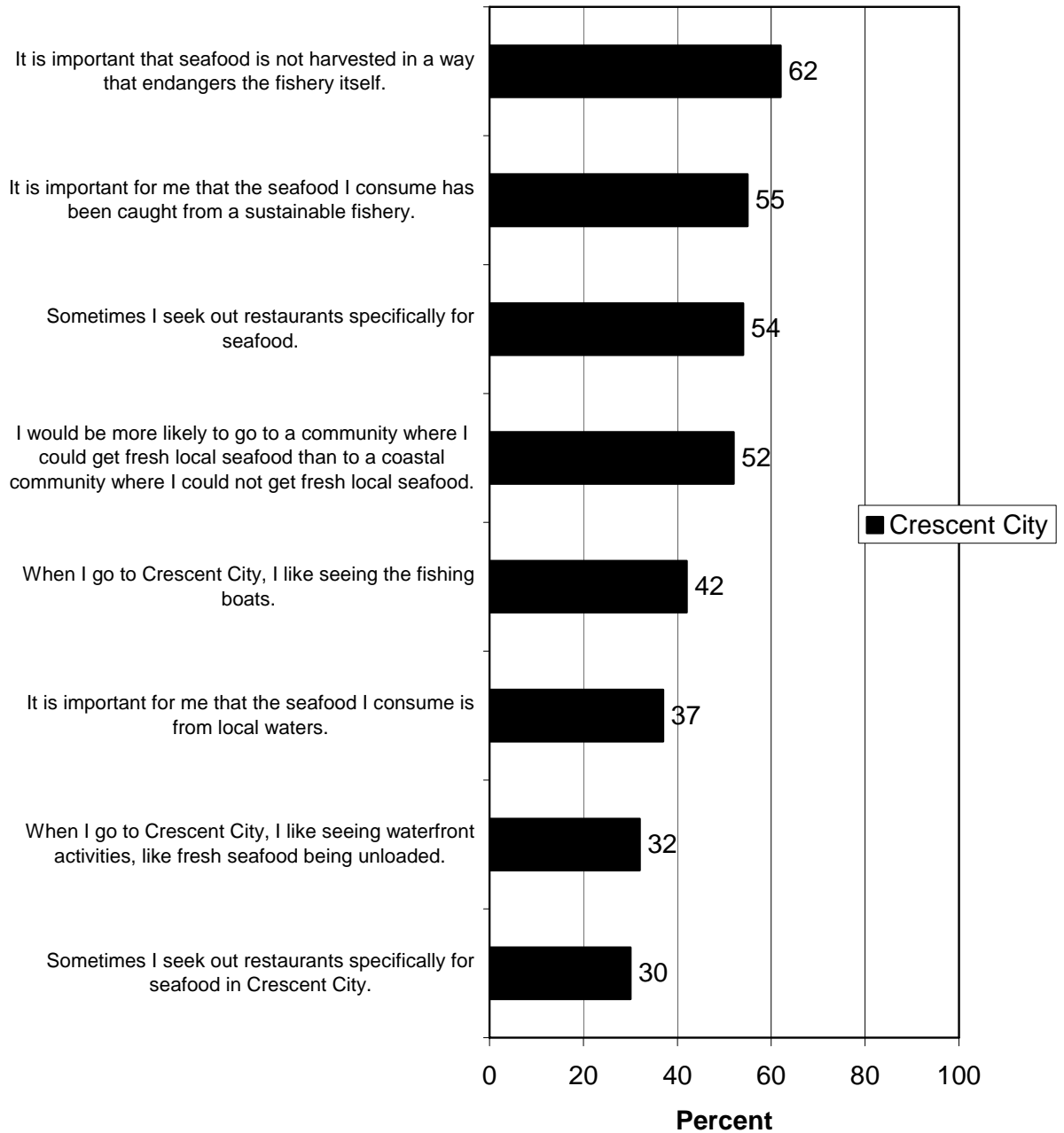
- The survey asked a series of questions (asking whether respondents agreed or disagreed with eight statements) about seafood consumption, and the results were ranked. Except for one statement among Crescent City visitors, majorities agree with all the statements (the exception being “Sometimes I seek out restaurants specifically for seafood in Crescent City,” with which 48% of Crescent City visitors agreed). Furthermore, in general, there was not much difference between the top-ranked statement and the lowest-ranked statement. For example, among Monterey visitors, agreement ranged only from 69% to 81%, and among Morro Bay visitors, agreement ranged from 72% to 89%. The top-ranked statement for all three communities is “It is important that seafood is not harvested in a way that endangers the fishery itself” (from 81% to 89% agree). (For each community, four graphs are shown: the percent *strongly* agreeing, the percent *strongly* or *moderately* agreeing, the percent *strongly* or *moderately* disagreeing, and the percent *strongly* disagreeing. Also included is a graph showing the percent *strongly* or *moderately* agreeing for all communities together, allowing a comparison.)
- Among Crescent City visitors, three statements have notably lower percentages in agreement than the rest: “When I go to Crescent City, I like seeing the fishing boats” (66% agree), “When I go to Crescent City, I like seeing waterfront activities, like fresh seafood being unloaded” (58%), and “Sometimes I seek out restaurants specifically for seafood in Crescent City” (48%, and as previously mentioned, the only statement with less than a majority in agreement).
 - Among Monterey visitors, all statements have at least 69% who agree.
 - Among Morro Bay visitors, all statements have at least 72% who agree.
 - The notable differences among the communities are discussed below.
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing the fishing boats” (note that the survey asked only about the one specific community the respondent had visited).
 - Crescent City visitors had the lowest percentage and Morro Bay visitors the highest percentage (with Monterey visitors in the middle) agreeing with the statement “When I go to Crescent City/Monterey/Morro Bay, I like seeing waterfront activities, like fresh seafood being unloaded” (as with the above, the survey asked only about the one specific community the respondent had visited).

- Monterey and Morro Bay visitors are much more likely than are Crescent City visitors to agree with the statement, “Sometimes I seek out restaurants specifically for seafood in Crescent City/Monterey/Morro Bay” (again, the survey asked only about the one specific community the respondent had visited).
 - As discussed in the Introduction and Methodology section, some of these results were previously discussed in another section of this report because they also pertain to that section.
- A large majority of visitors to Crescent City (55%) ate seafood in a restaurant when visiting that community, and very large majorities of visitors to Monterey (81%) and Morro Bay (85%) ate seafood in a restaurant when visiting those communities.
- When asked in follow-up whether the seafood they ate in a restaurant was locally caught, about half of those respondents indicated that it was locally caught: 46% of Crescent City visitors who ate seafood in a restaurant, 48% of Monterey visitors who ate seafood in a restaurant, and 47% of Morro Bay visitors who ate seafood in a restaurant. (Note that majorities did not know.)
- Small, but not insubstantial, percentages of visitors to the three communities ate seafood purchased from a market or other non-restaurant place: 8% of Crescent City visitors, 14% of Monterey visitors, and 26% of Morro Bay visitors.
- When asked in follow-up whether the seafood they ate from a market or other non-restaurant place was locally caught, at least half of those respondents indicated that it was locally caught: 50% of Crescent City visitors who ate seafood from a market, 64% of Monterey visitors who ate seafood from a market, and 58% of Morro Bay visitors who ate seafood from a market. (Note that most of the remainder did not know.)
- Within the series of questions regarding the importance of factors in respondents’ decisions to visit one of the three communities was a question specifically about the importance of being able to get fresh local seafood, and it is worth examining this question individually. Being able to get fresh local seafood had been important to a majority of Monterey and Morro Bay visitors when they had decided to go to those places (61% and 71%, respectively), and in these communities, “important” responses far exceeded “unimportant” responses (16% and 8%, respectively, said that being able to get fresh local seafood had been unimportant in their decision to go to Monterey or Morro Bay). Crescent City visitors were

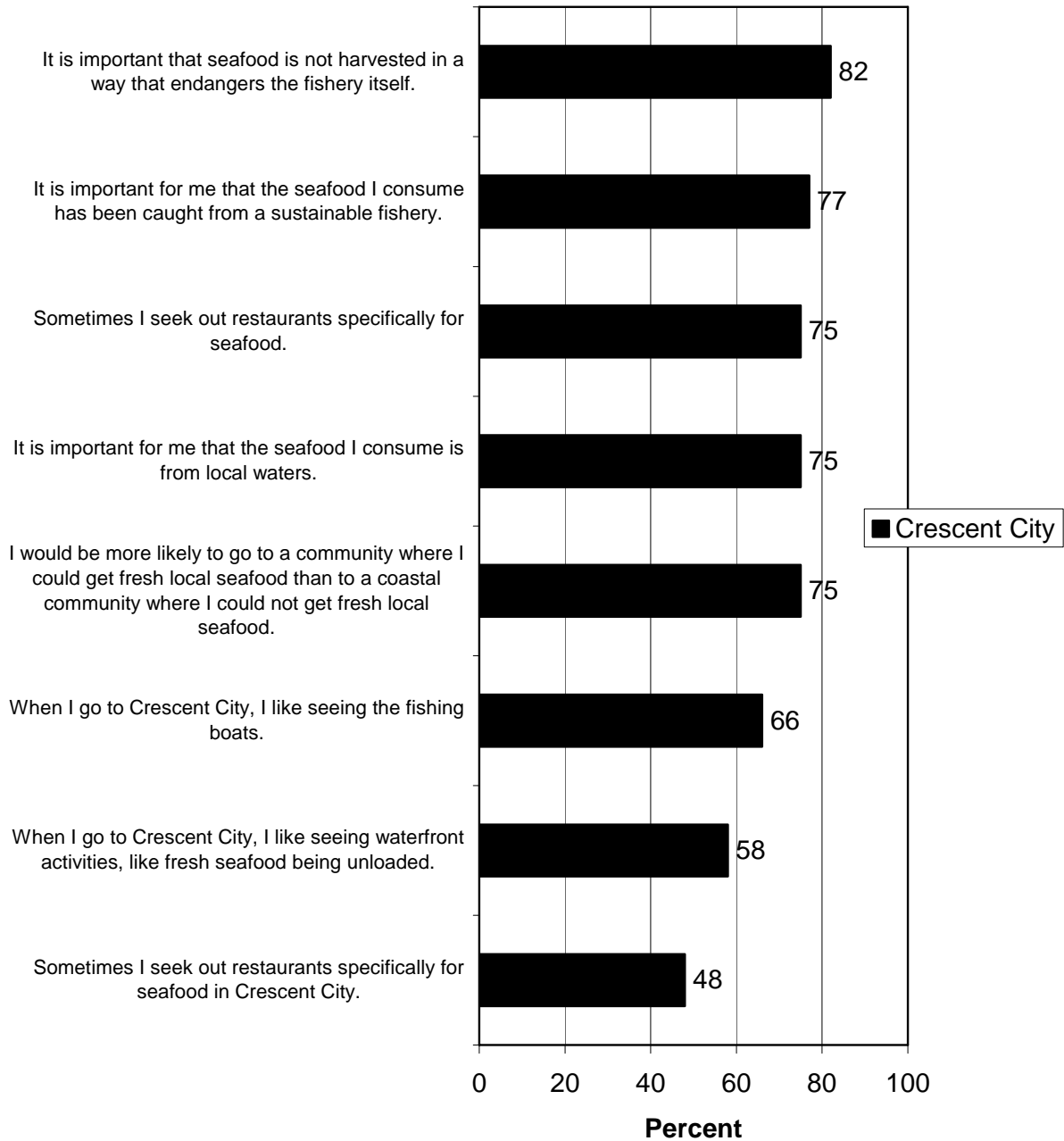
split, with 41% who said that being able to get fresh local seafood had been important, and 43% who said it had been unimportant.

- Within the series of questions regarding the importance of factors in respondents' decisions whether to visit a restaurant in one of these coastal communities was a question about the importance of being able to get fresh local seafood in that restaurant. For each community, those who say being able to get fresh local seafood is important (72% of Crescent City visitors, 74% of Monterey visitors, and 79% of Morro Bay visitors) far exceed those who say this is unimportant (21% of Crescent City visitors, 8% of Monterey visitors, and 6% of Morro Bay visitors).
- The survey asked respondents if they had ever compared the costs of local versus non-local seafood: for each community, the percentage who had *not* compared costs of seafood exceeded the percentage who had done so (although among Monterey visitors, the difference in "Yes" and "No" answers is only 1 percentage point). Indeed, 27% of Crescent City visitors, 35% of Monterey visitors, and 32% of Morro Bay visitors had compared costs. Therefore, the broad conclusion is that costs of seafood are moderately important, but not greatly important.
 - The survey then asked if respondents thought that local seafood was more expensive than, less expensive than, or about the same as non-local seafood. Generally, more people think local seafood is more expensive than think it is less expensive (note that in each community, the most common answer is, "Don't know"). However, among those who think that local seafood is more expensive, most say that the more expensive price does *not* deter them from buying local seafood in these coastal communities. (Note that this study did not address whether local seafood *actually* is more or less expensive than non-local seafood; the question was asked of those who *think* local seafood is more expensive, whether this is true or not.)

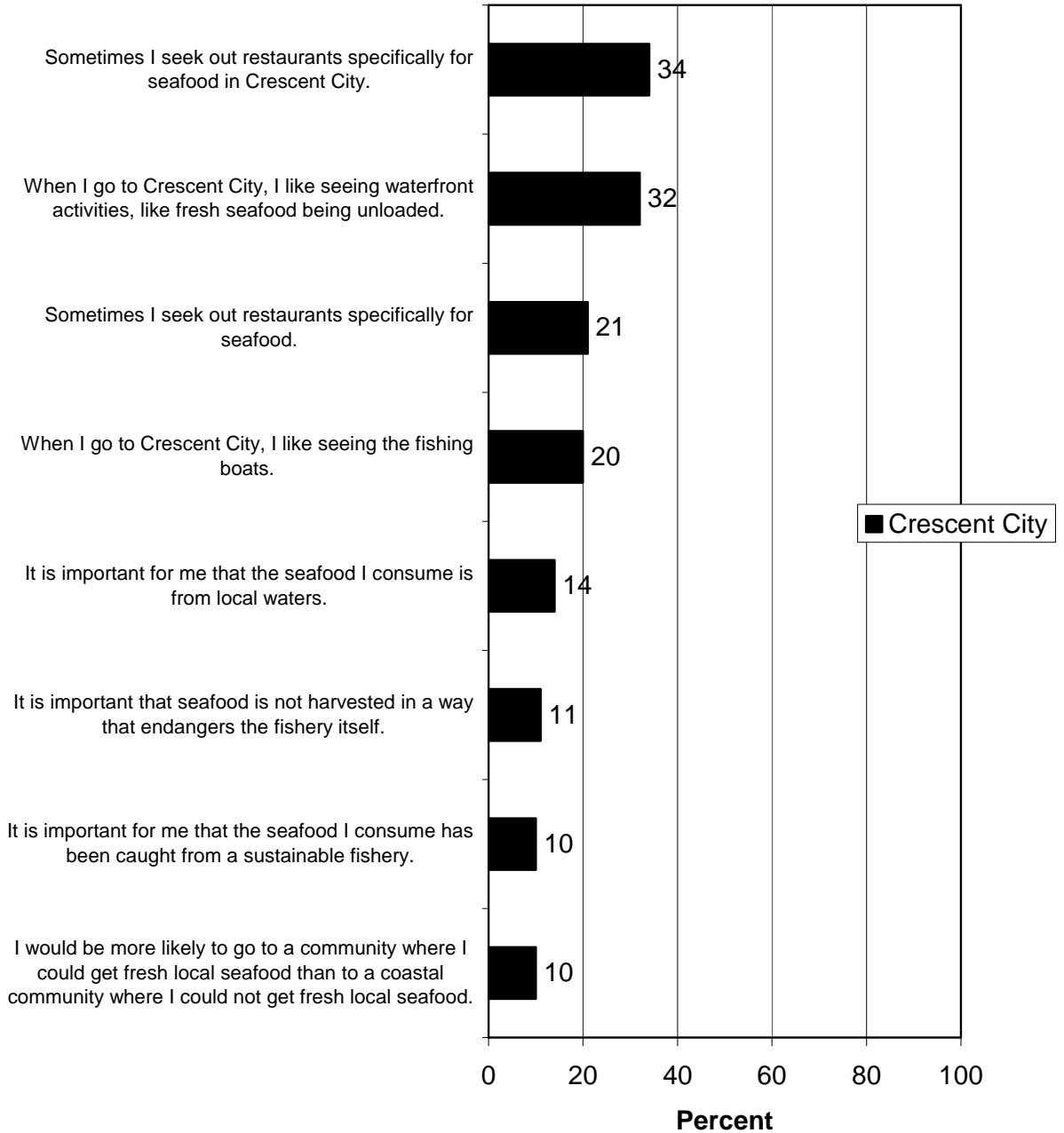
Percent who strongly agree with the following statements on seafood consumption.



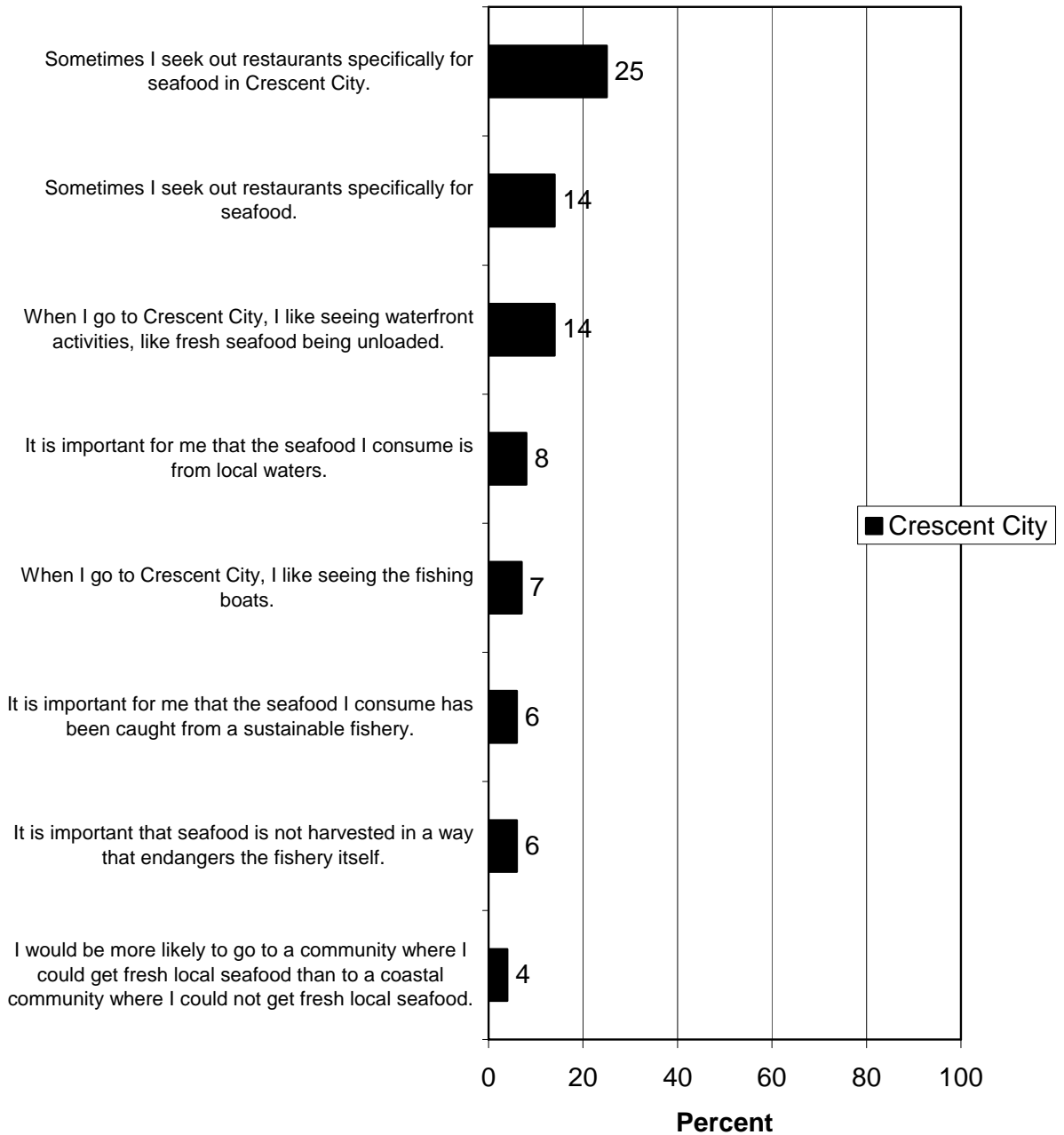
Percent who strongly or moderately agree with the following statements on seafood consumption.



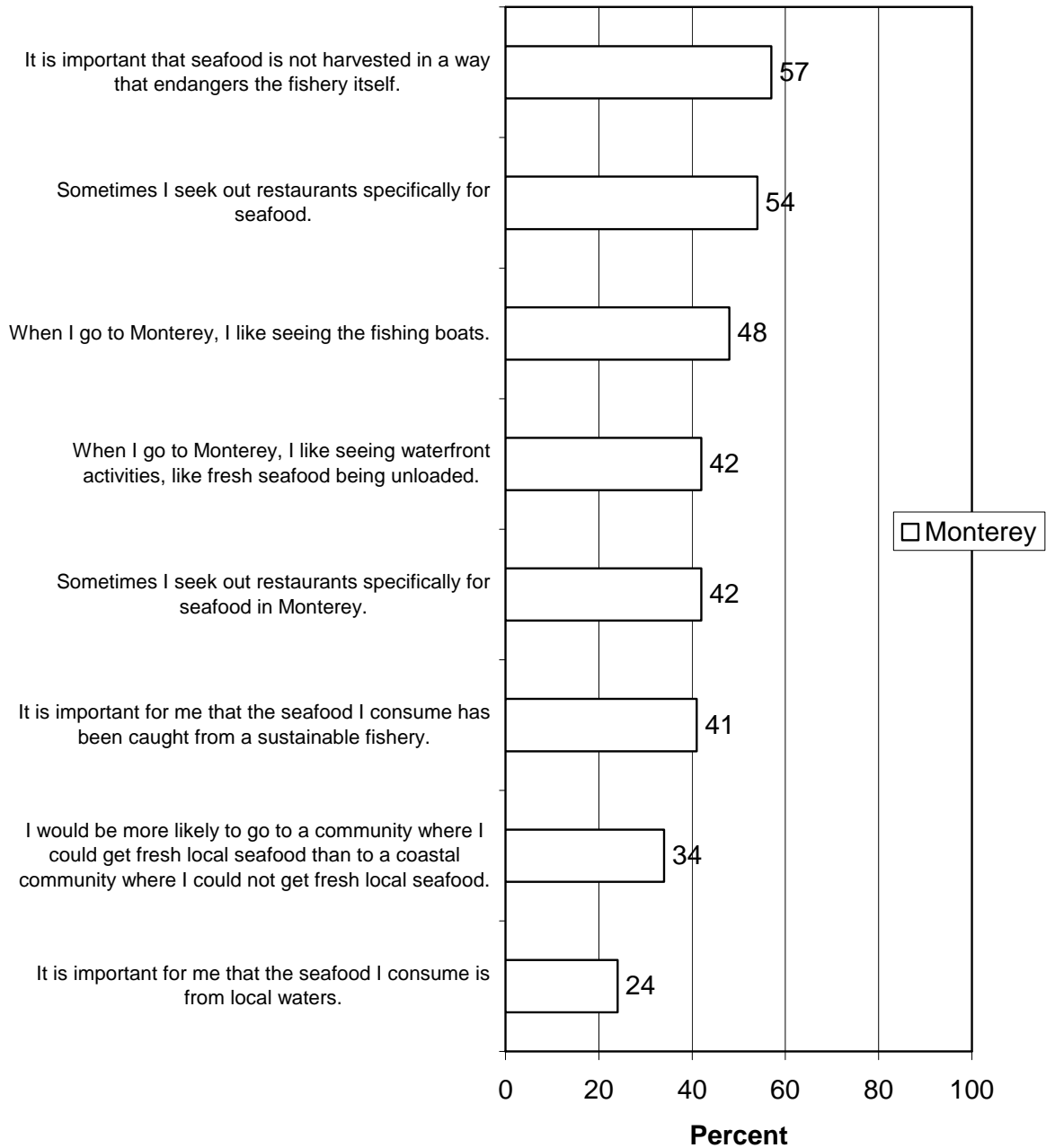
Percent who moderately or strongly disagree with the following statements on seafood consumption.



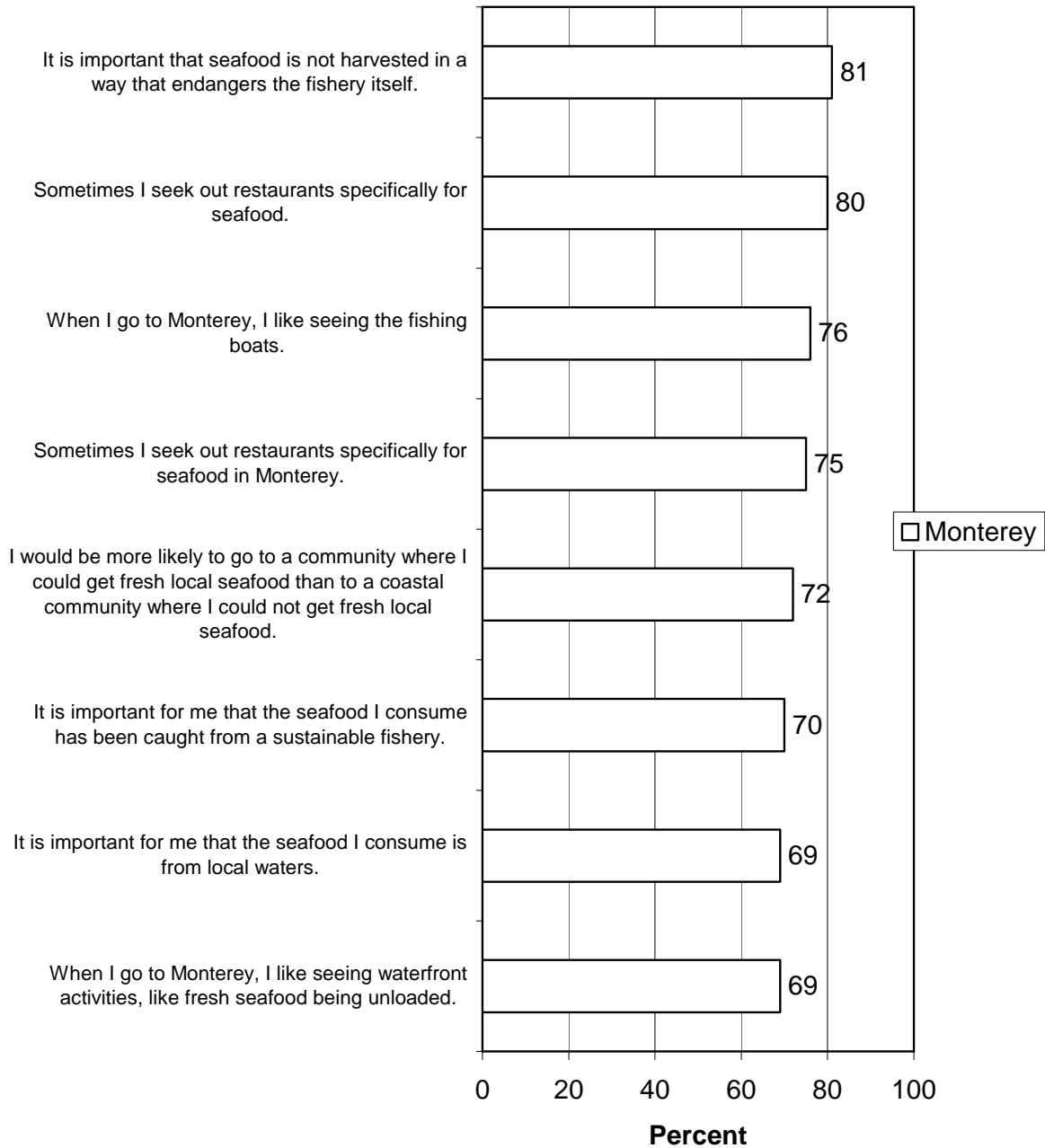
Percent who strongly disagree with the following statements on seafood consumption.



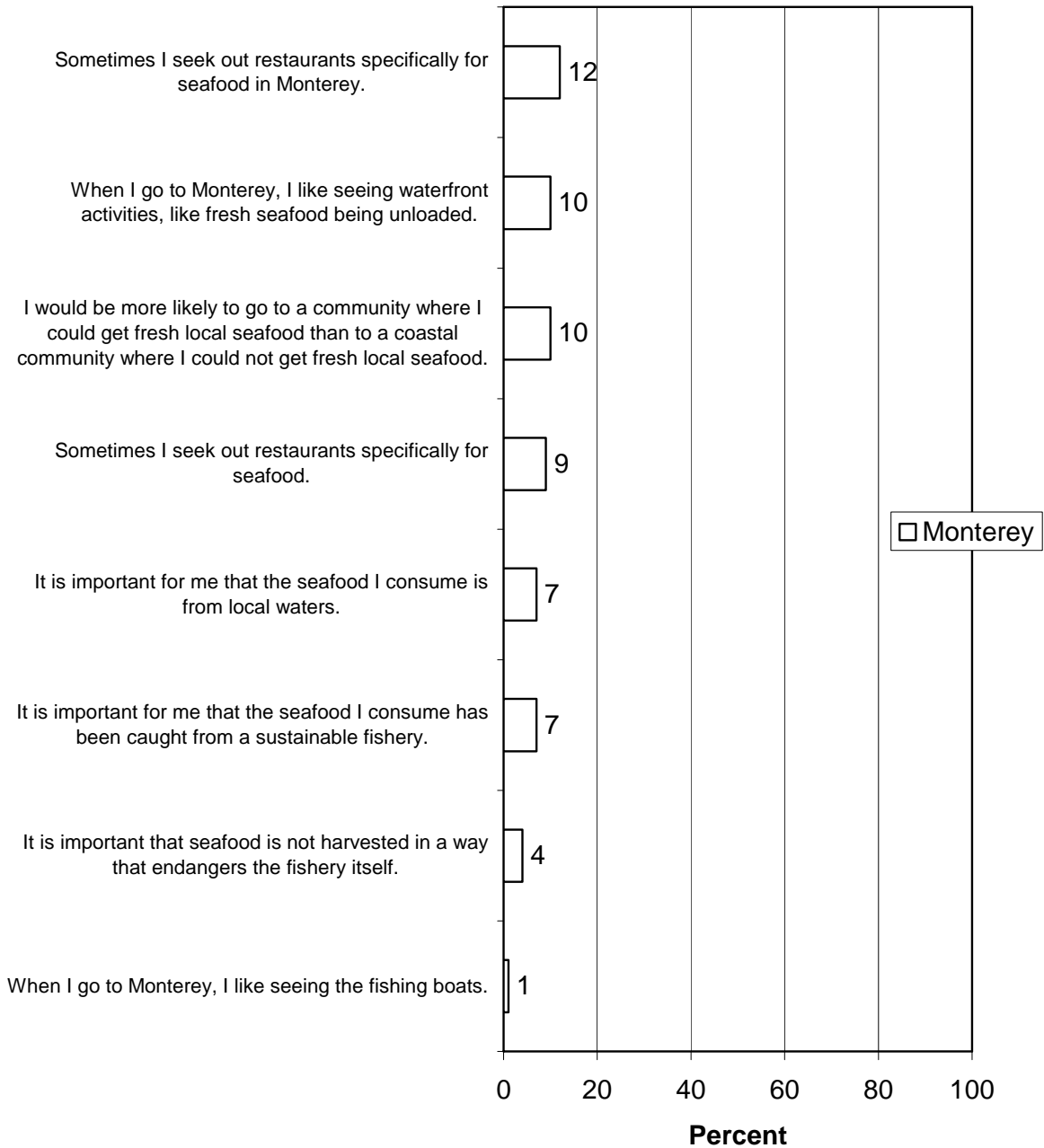
Percent who strongly agree with the following statements on seafood consumption.



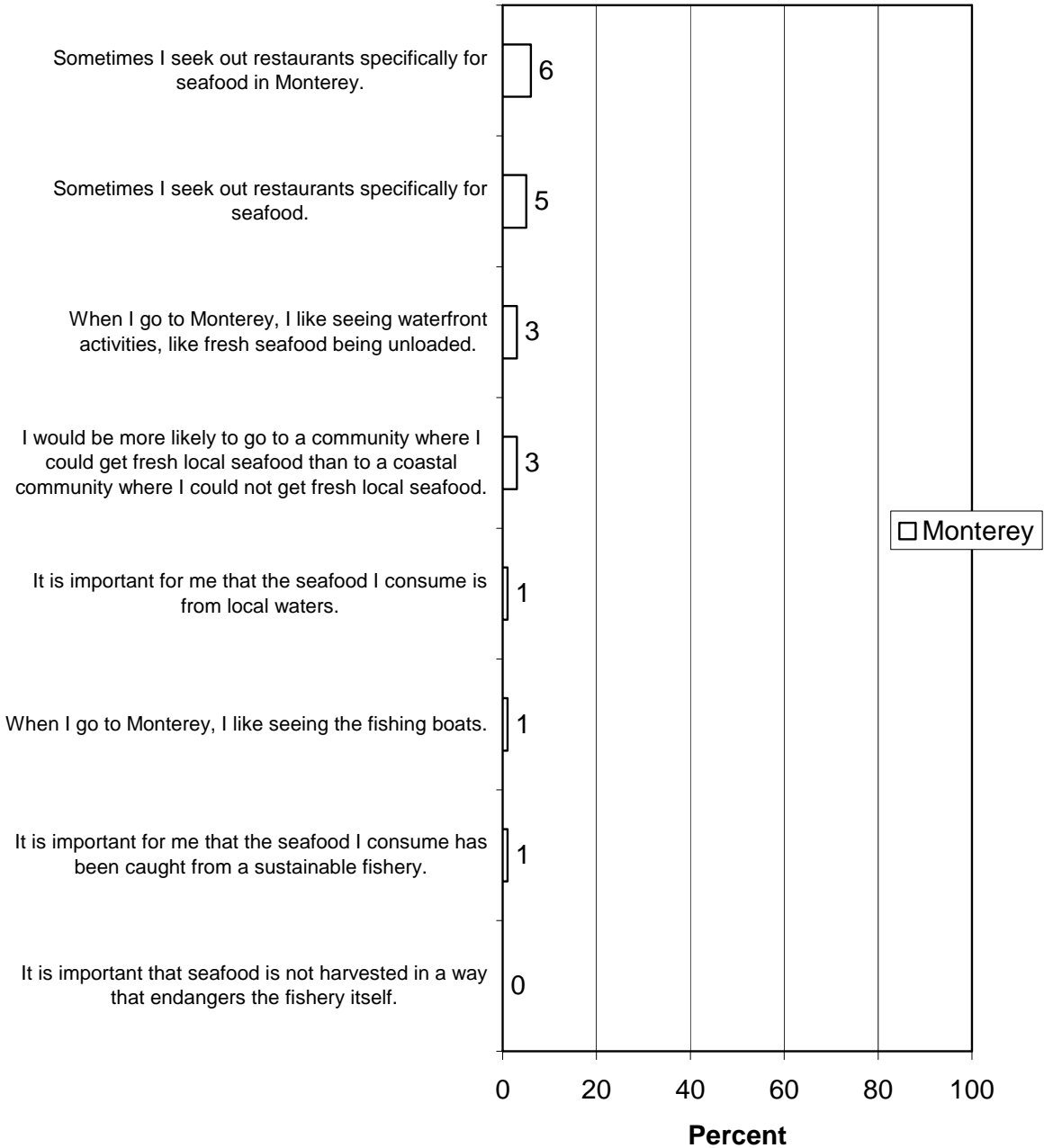
Percent who strongly or moderately agree with the following statements on seafood consumption.



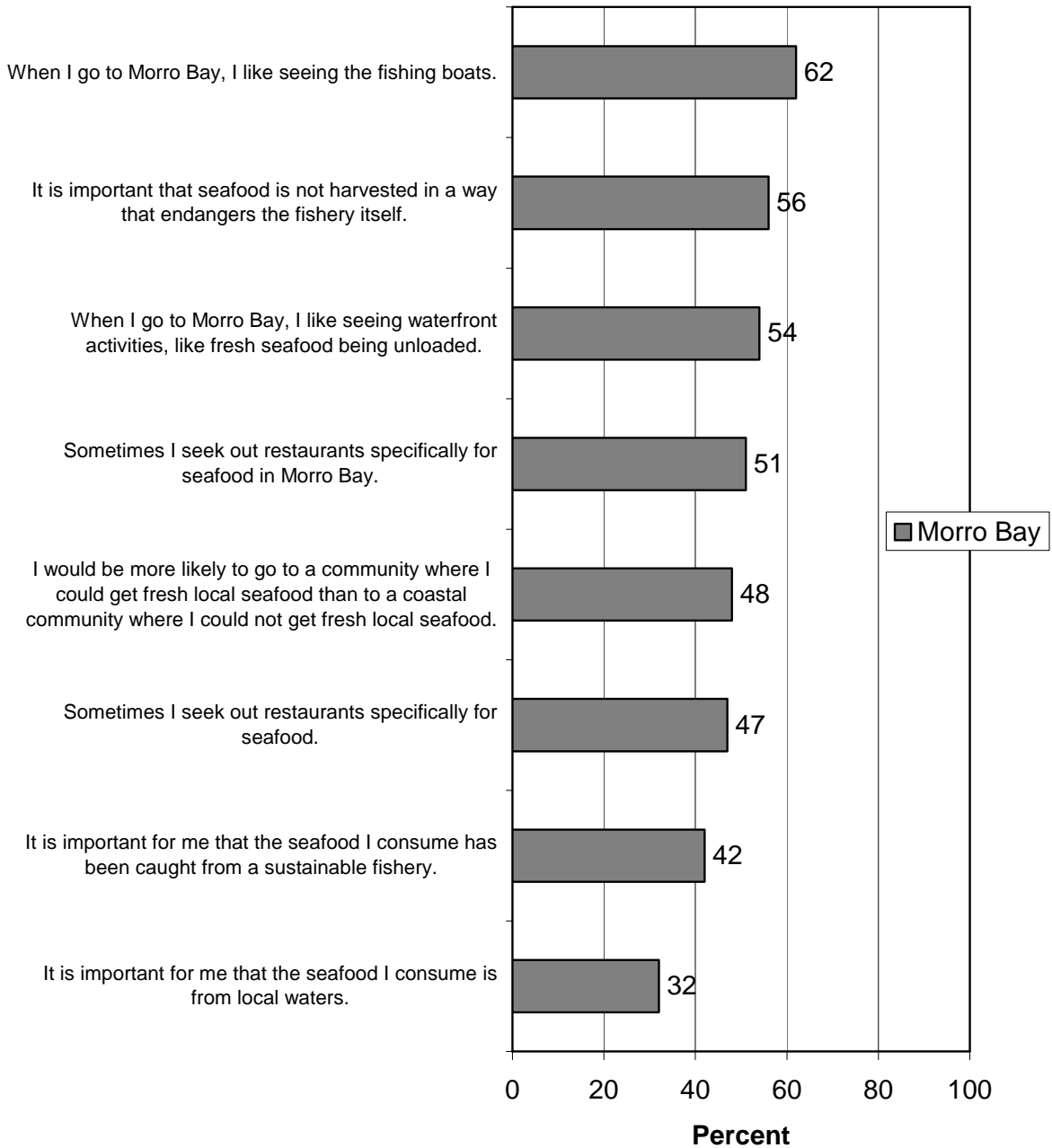
Percent who moderately or strongly disagree with the following statements on seafood consumption.



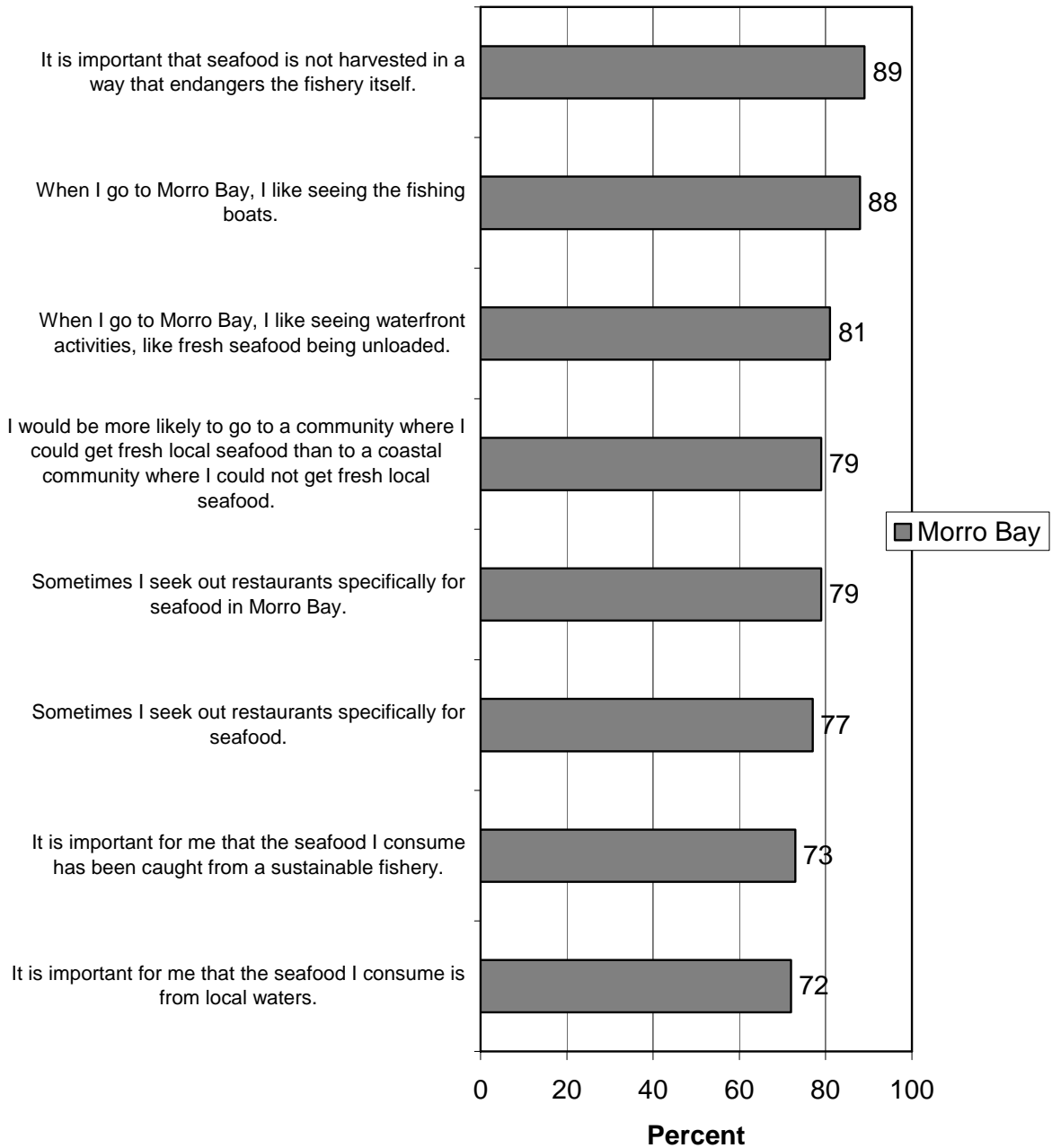
Percent who strongly disagree with the following statements on seafood consumption.



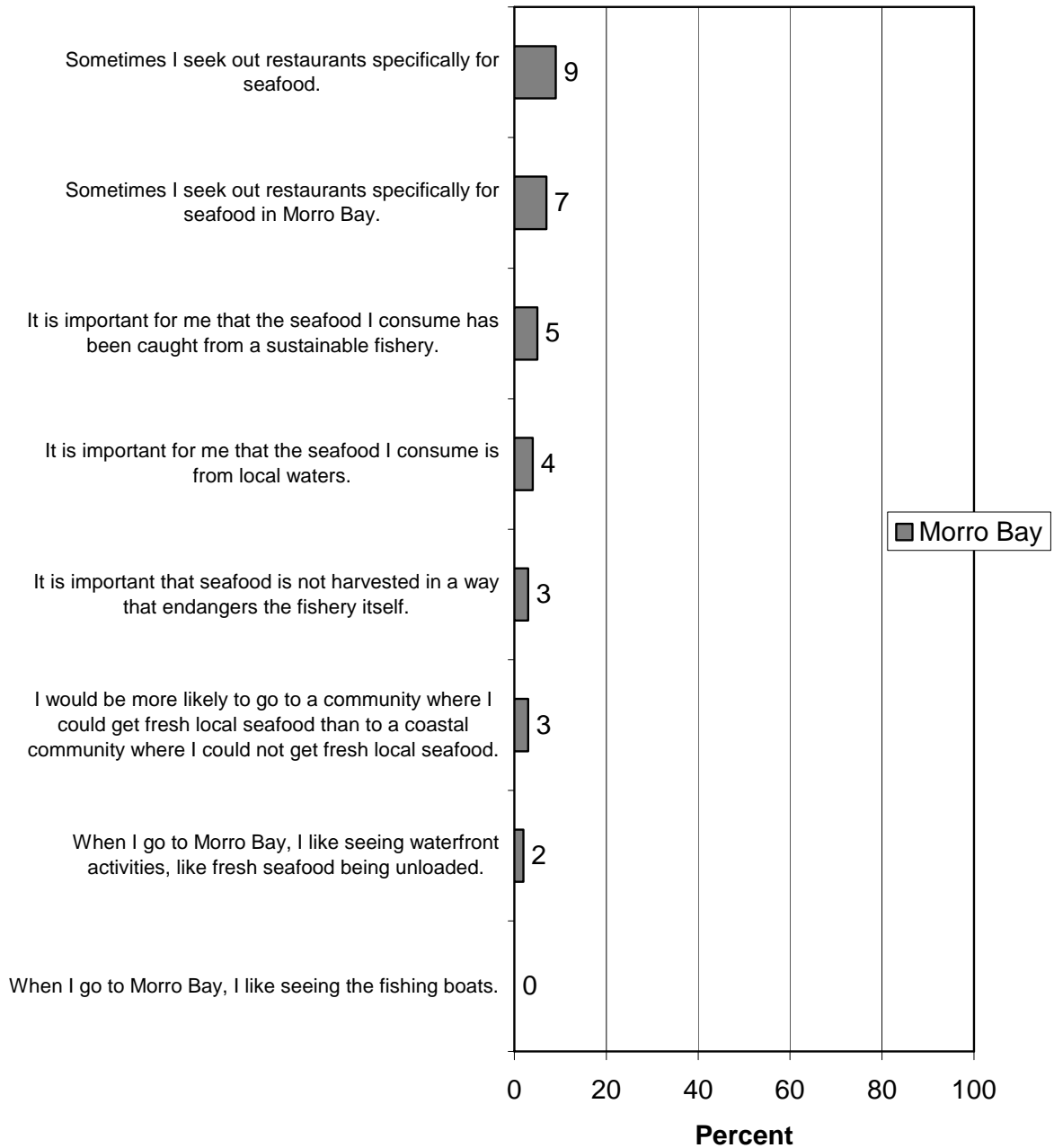
Percent who strongly agree with the following statements on seafood consumption.



Percent who strongly or moderately agree with the following statements on seafood consumption.



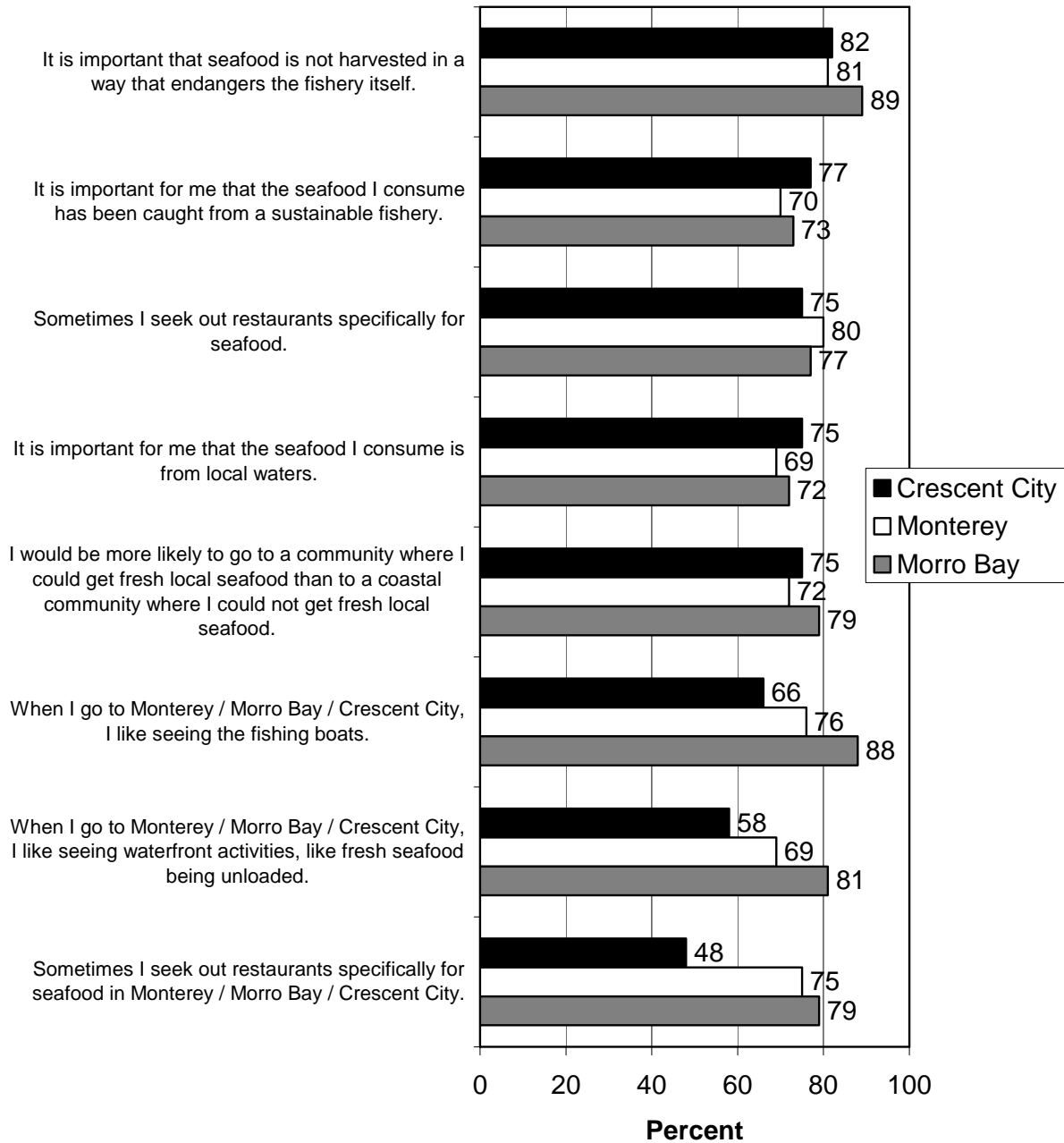
Percent who moderately or strongly disagree with the following statements on seafood consumption.



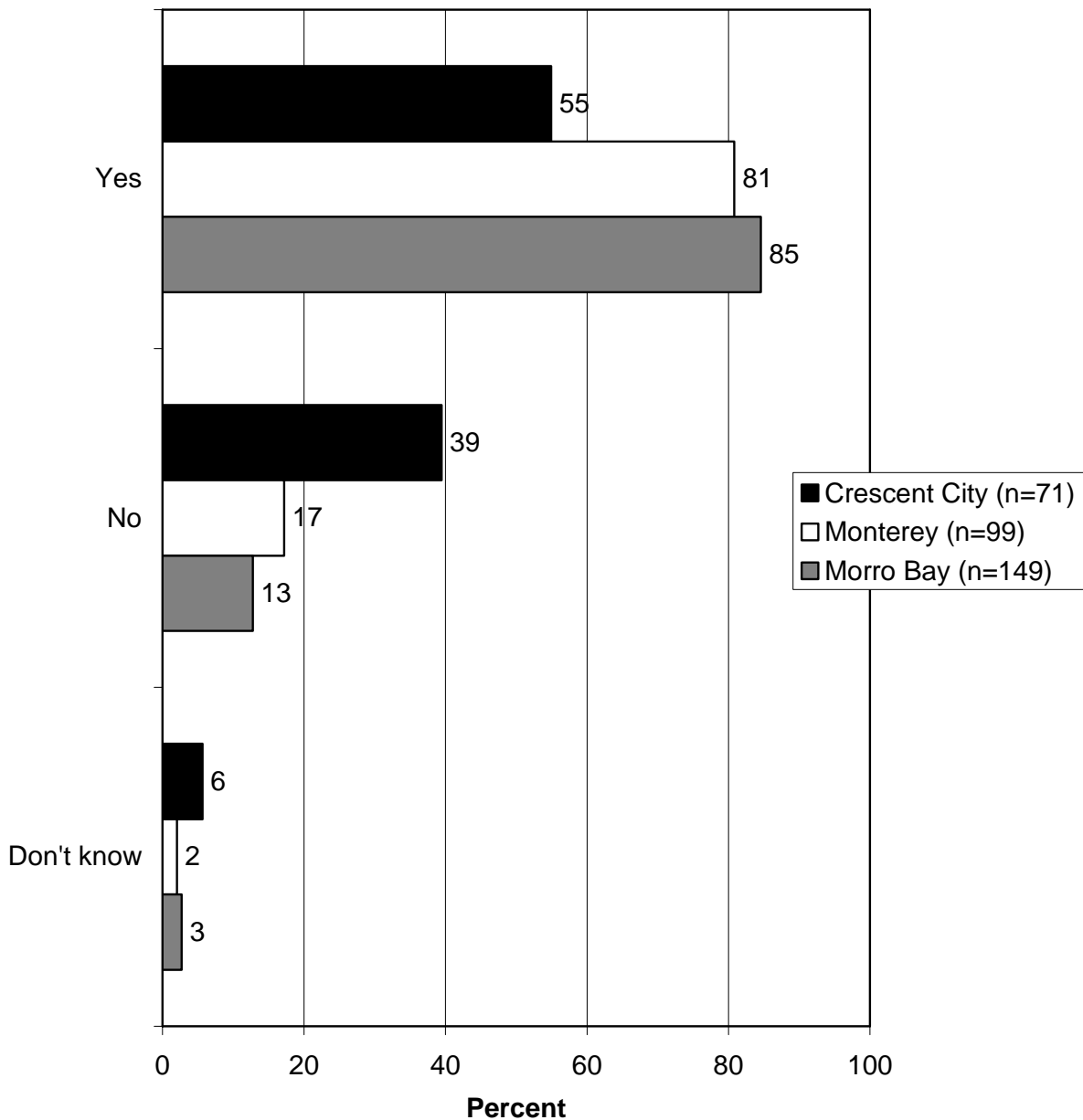
Percent who strongly disagree with the following statements on seafood consumption.



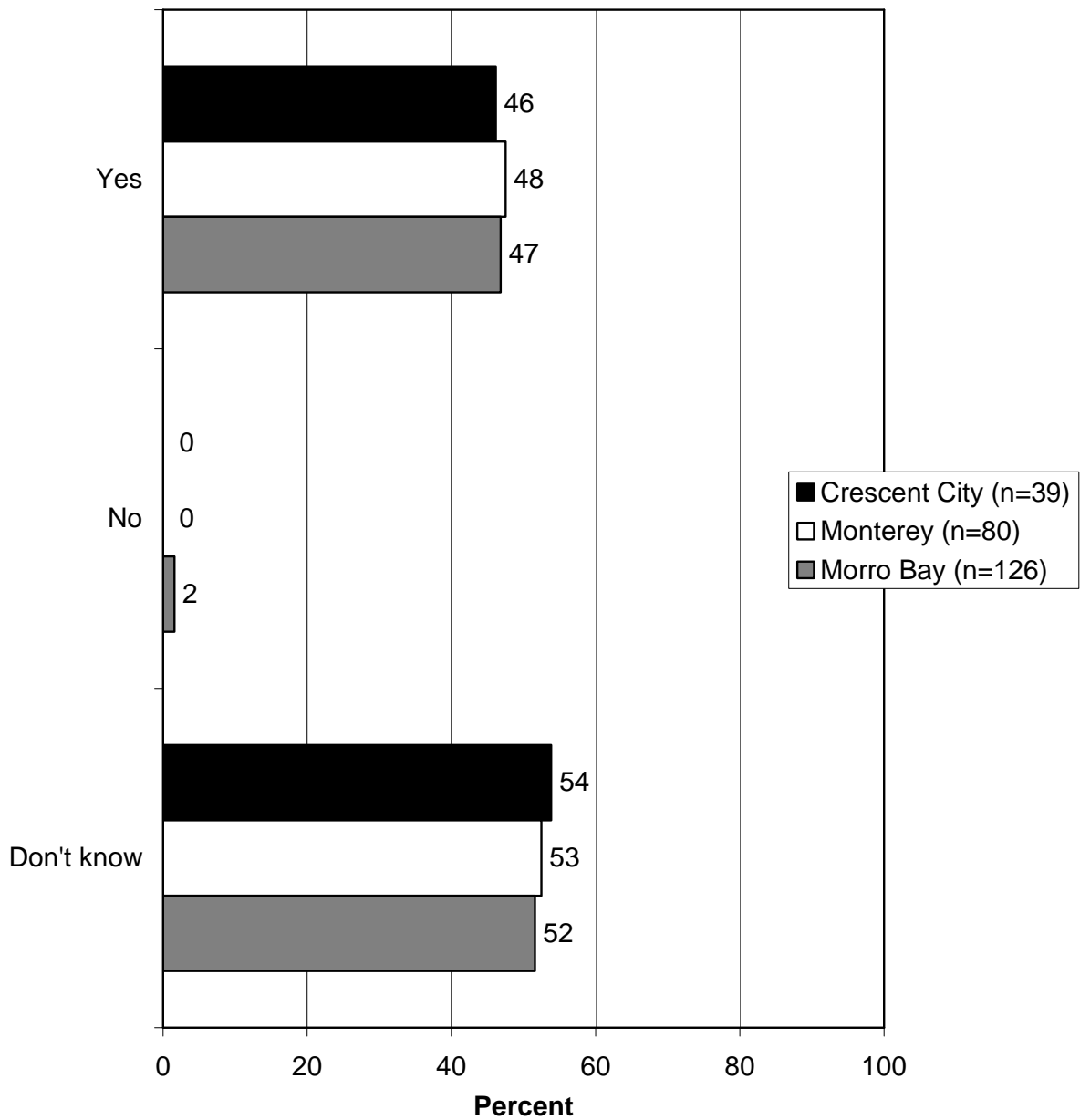
Percent who strongly or moderately agree with the following statements on seafood consumption.



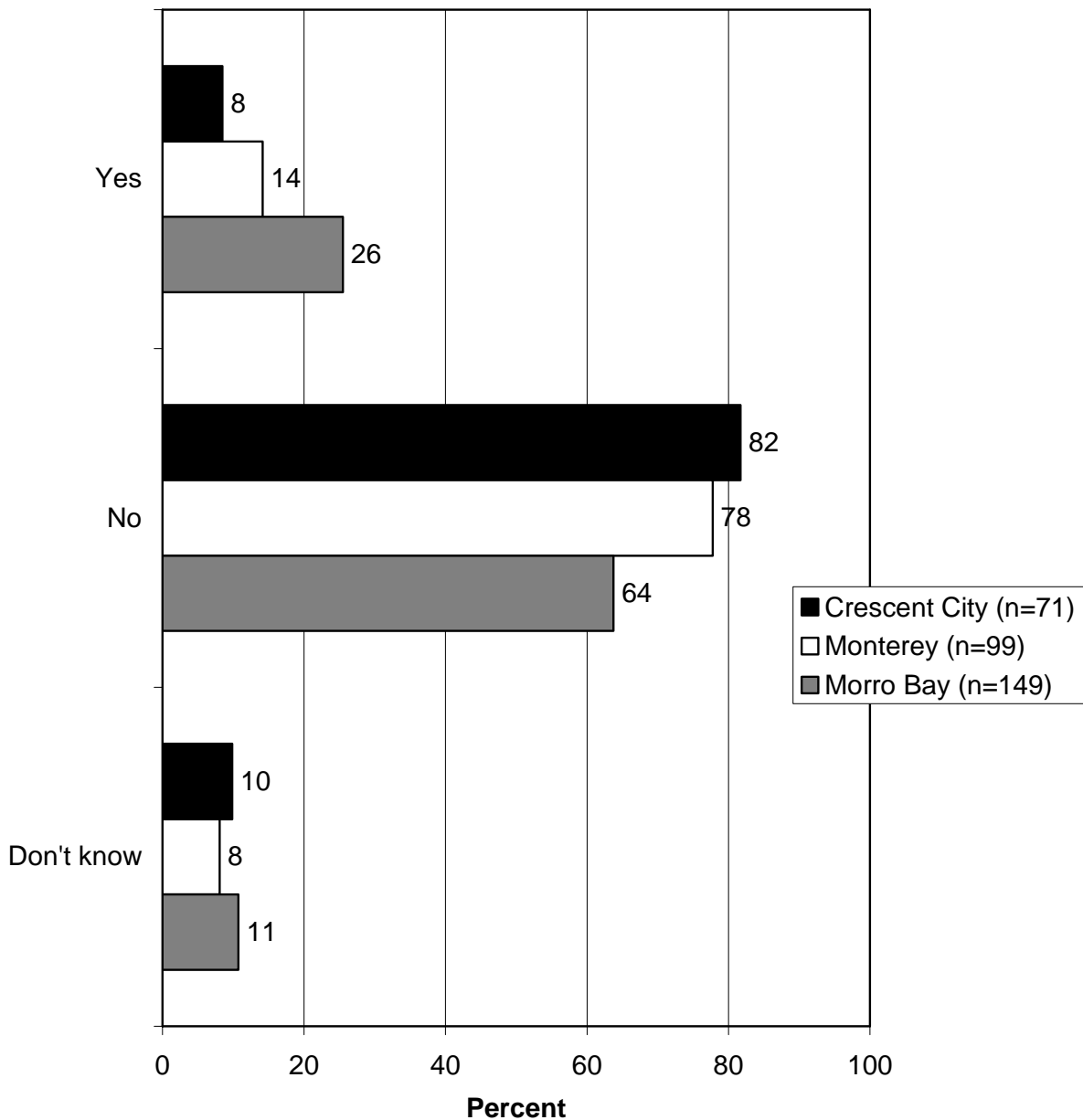
Q21. Have you eaten seafood in a restaurant in Monterey / Morro Bay / Crescent City in the past 2 years? (Among all respondents.)



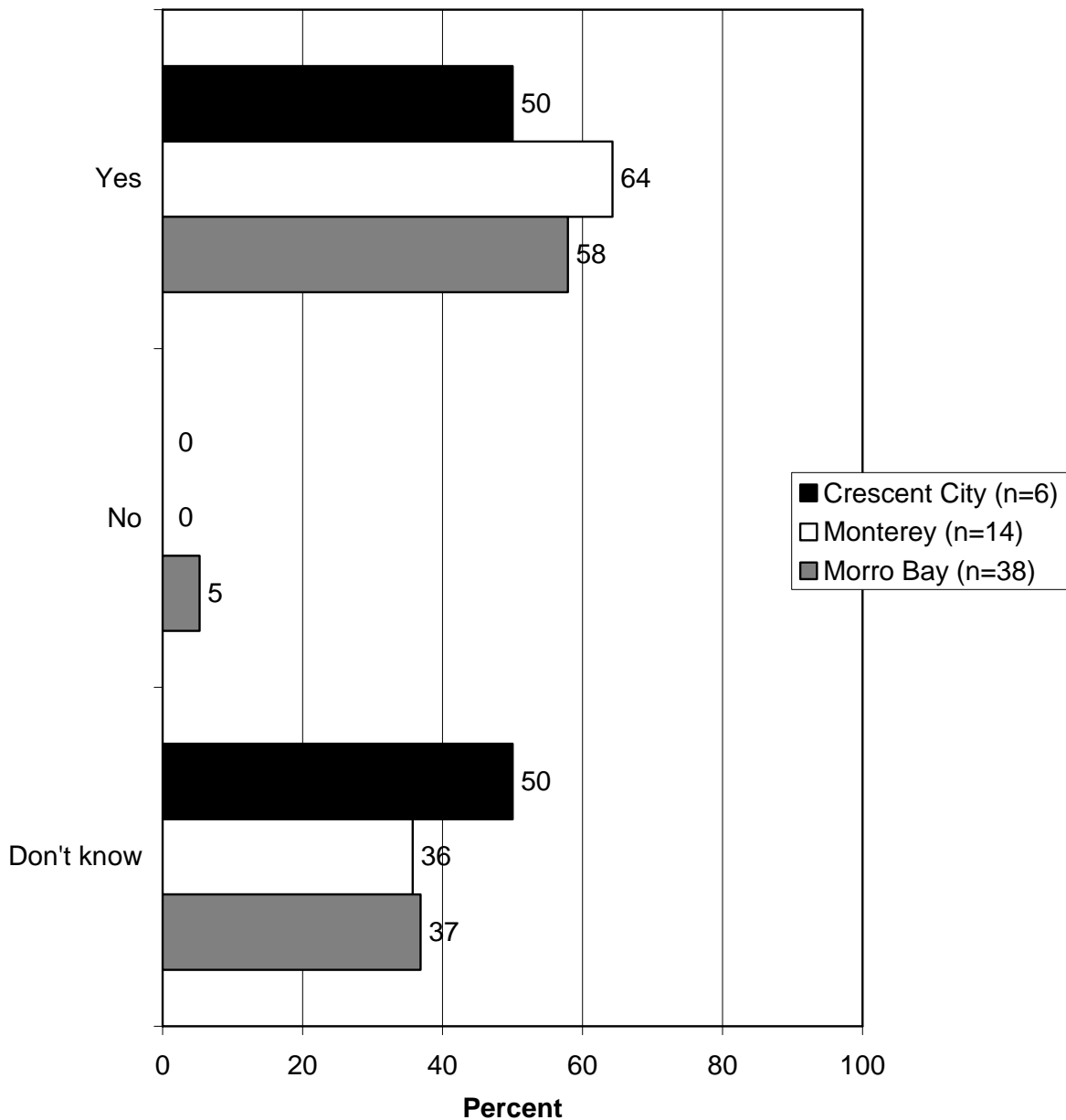
Q22. Was any of that seafood locally caught, or do you not know? (Asked of those who ate seafood at a Monterey / Morro Bay / Crescent City restaurant in the past 2 years.)



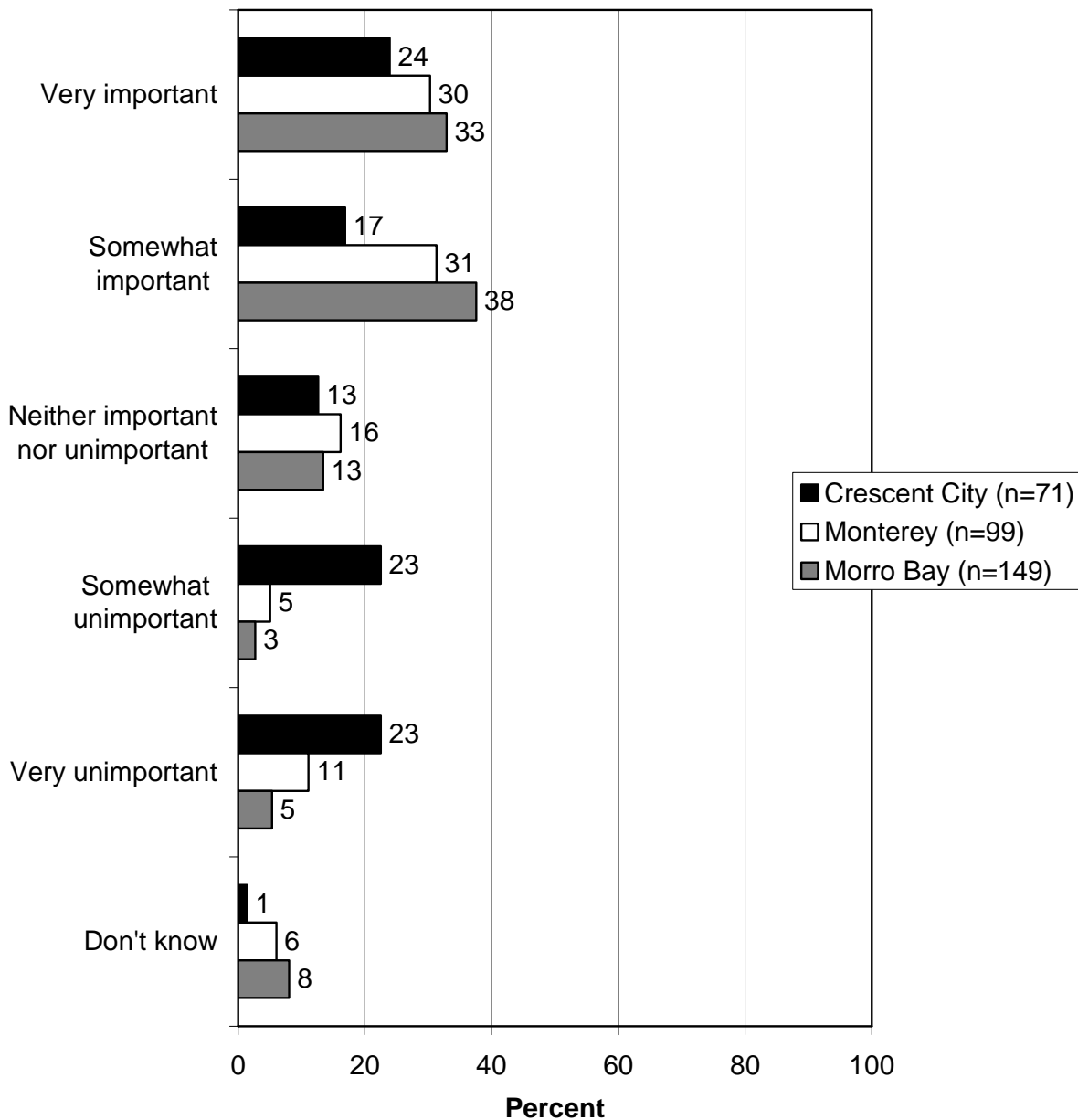
Q23. Did you eat seafood purchased in Monterey / Morro Bay / Crescent City from a market or other place?



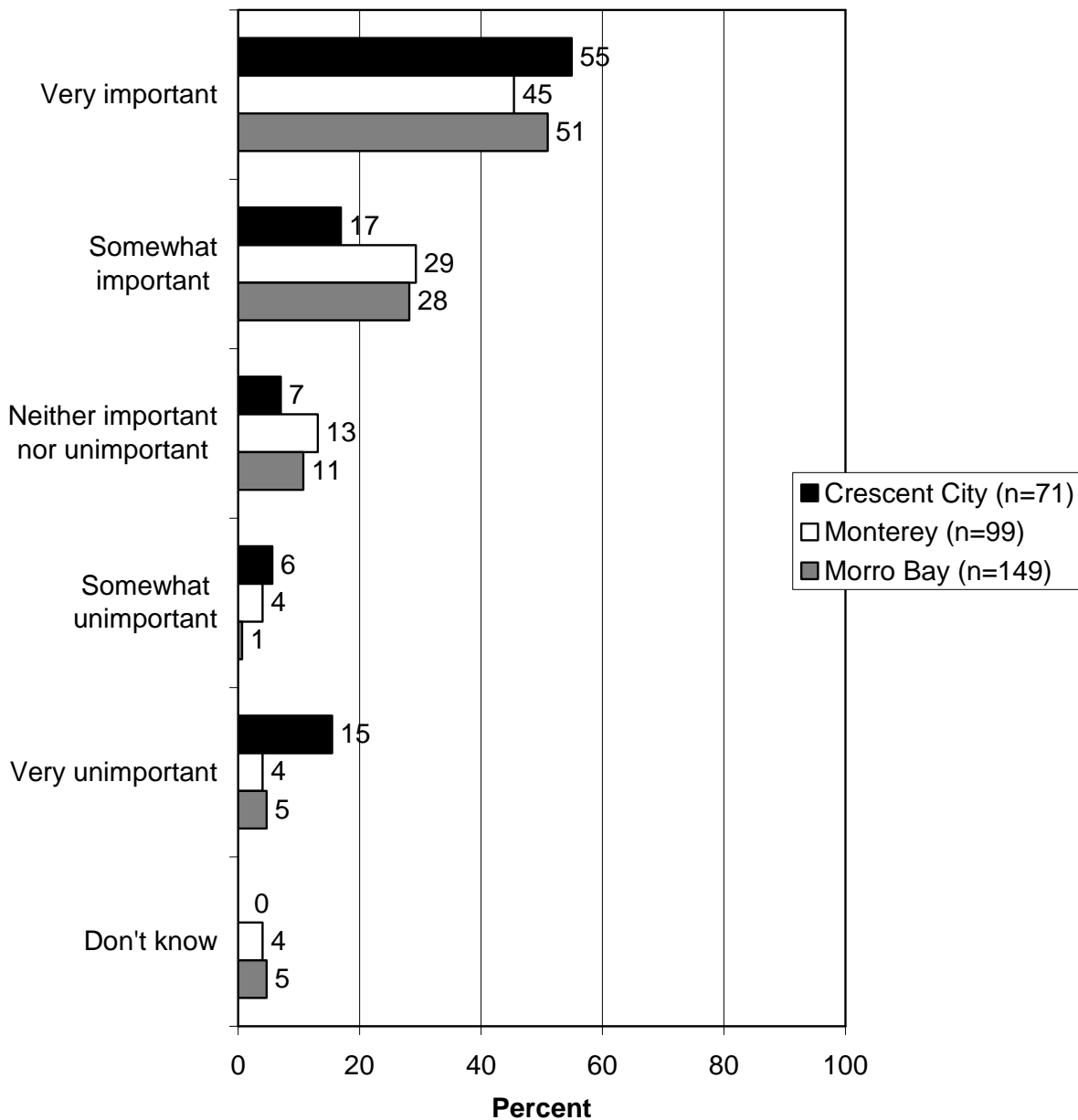
Q24. Was any of that seafood locally caught, or do you not know? (Asked of those who ate seafood purchased from a market or other place in Monterey / Morro Bay / Crescent City.)



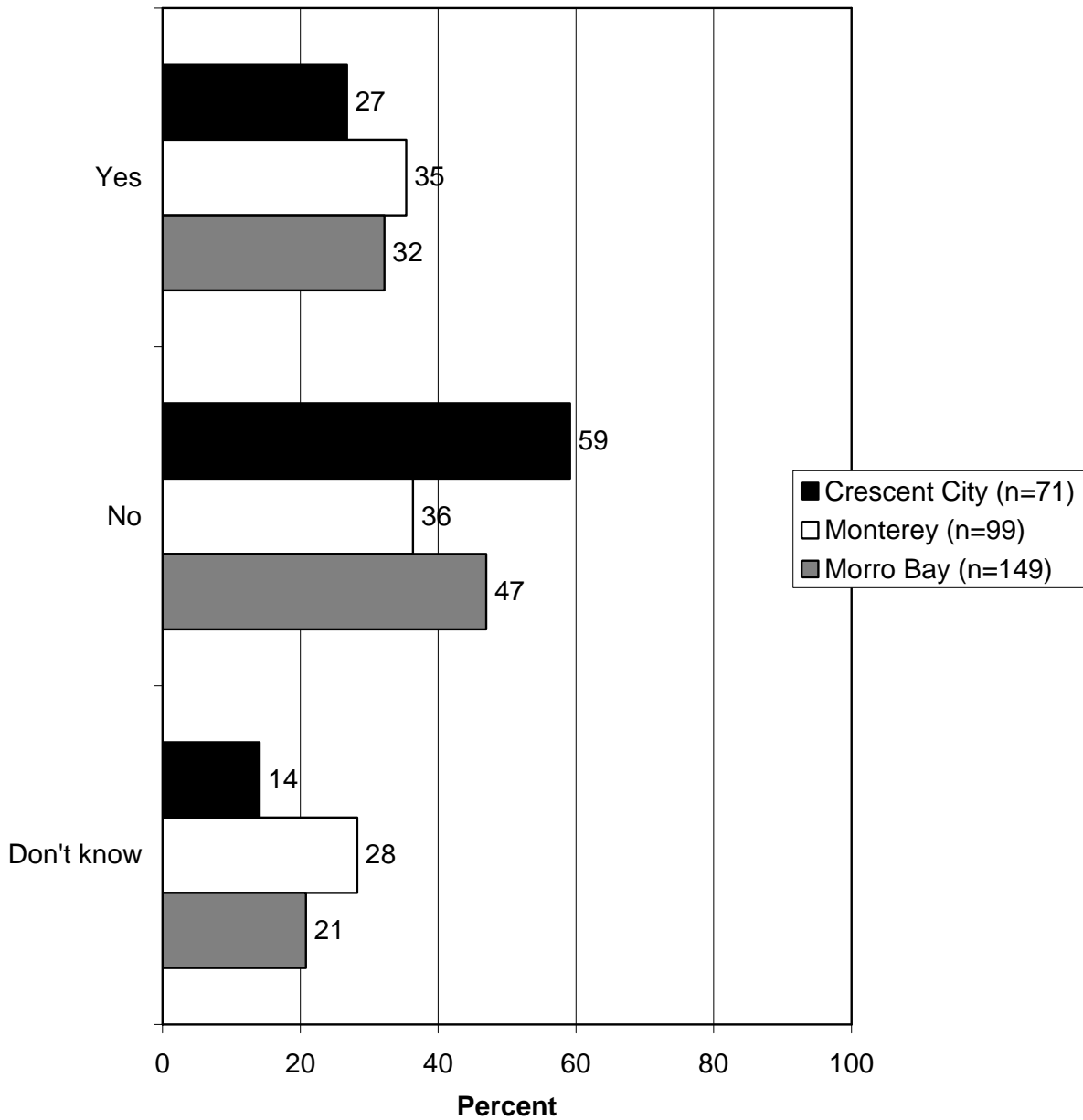
Q32. What about being able to get fresh local seafood? (How important or unimportant was this when you decided to make your visit to Crescent City / Monterey / Morro Bay?)



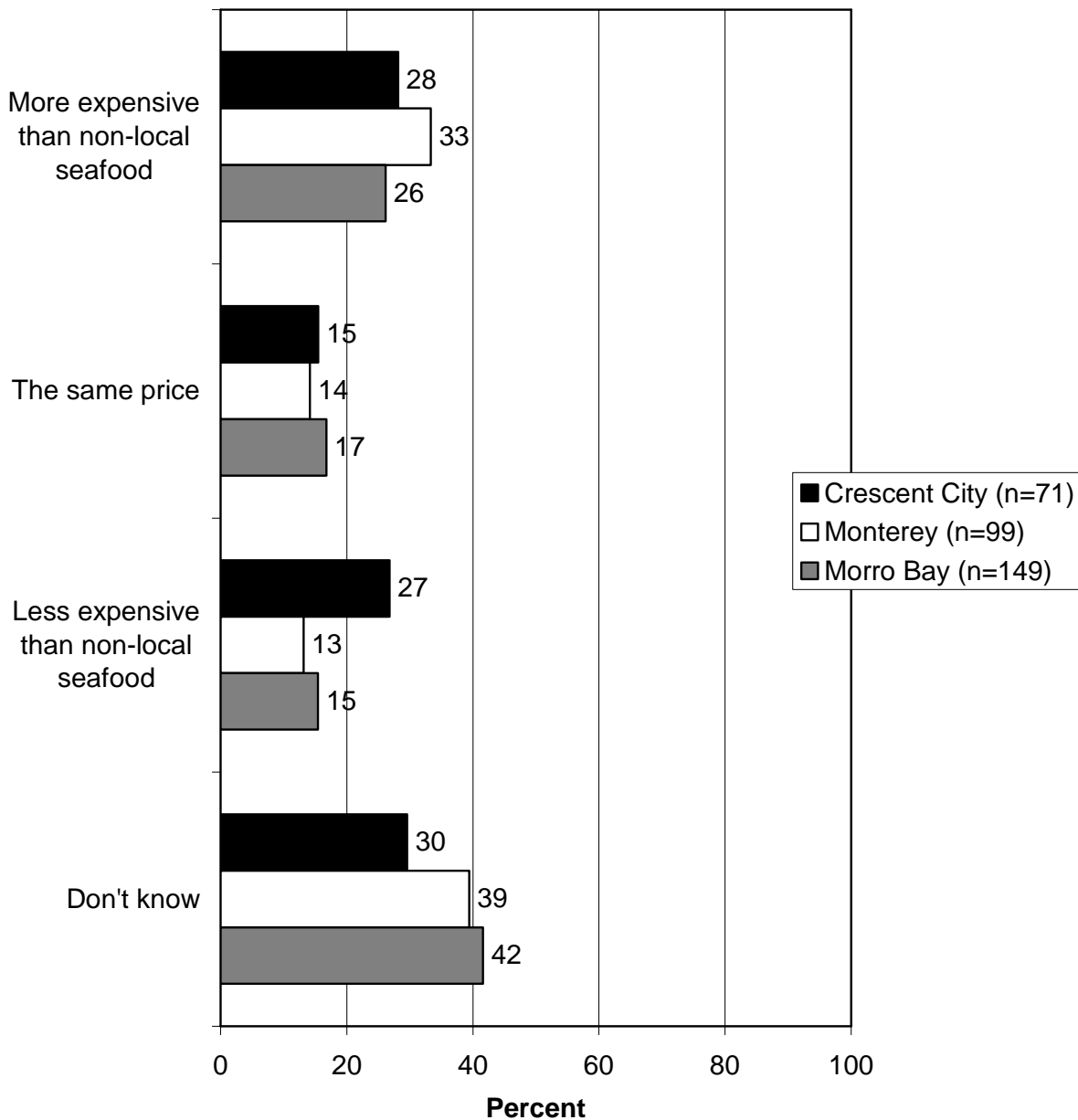
Q40. What about being able to get fresh local seafood? (How important or unimportant would this be if you were to do to a restaurant in Crescent City / Monterey / Morro Bay?)



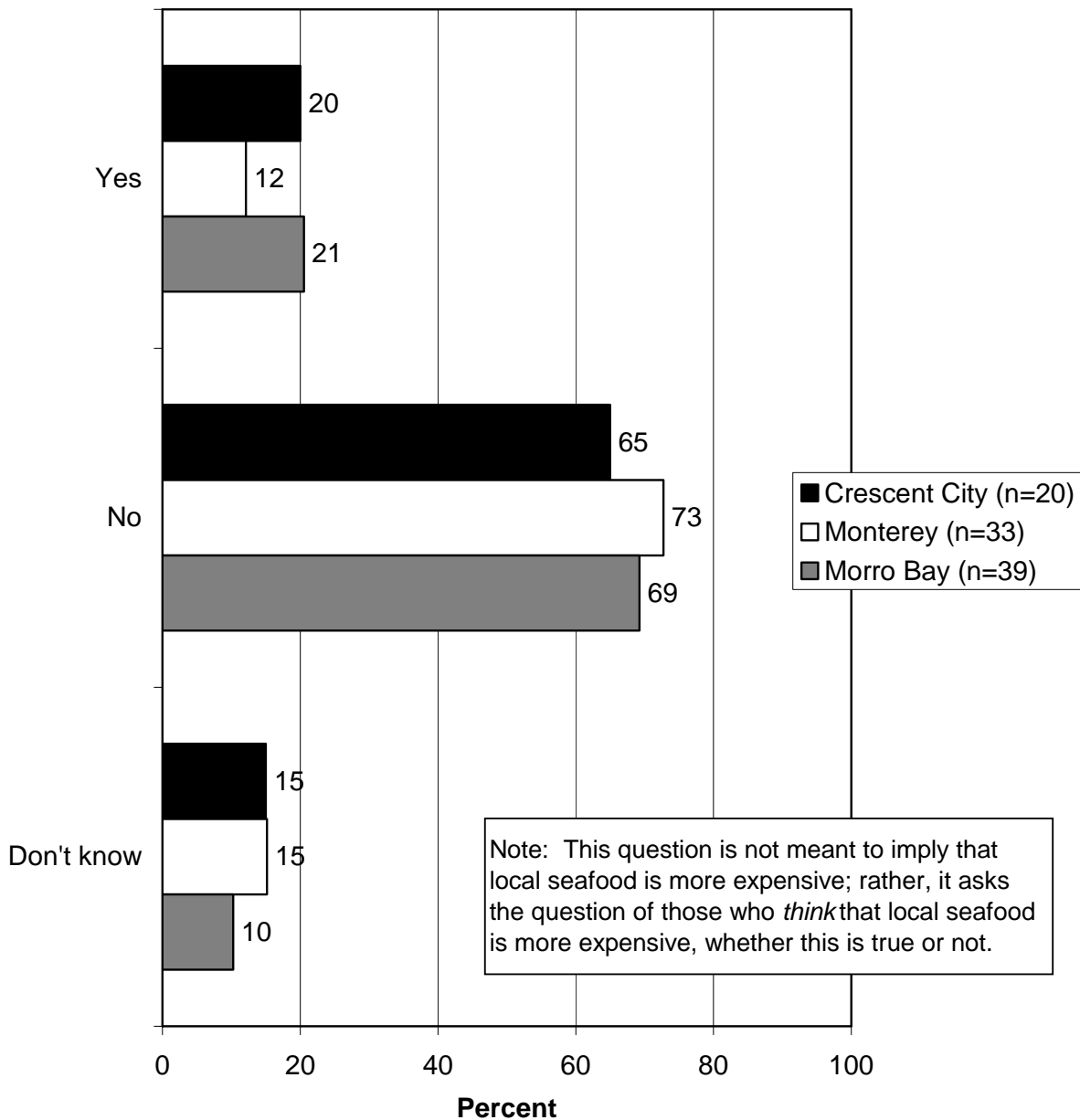
Q74. Have you ever compared the costs of local fresh seafood versus non-local seafood?



Q75. Do you think fresh local seafood is, generally speaking more expensive than non-local seafood, the same price, or less expensive than non-local seafood?



Q76. Does the greater expense deter you from buying local seafood in Monterey / Morro Bay / Crescent City? (Asked of those who believe that fresh local seafood is more expensive than non-local seafood.)



OPINIONS ON COMMERCIAL FISHING AND WATERFRONT INDUSTRIES

- The survey asked seven questions of Crescent City visitors and six questions of Monterey and Morro Bay visitors regarding the economy and the fishing/waterfront industries. In all communities, there is almost *no* agreement that working waterfronts are no longer important to the economies of coastal communities: only 8% of Crescent City visitors, 5% of Monterey visitors, and 2% of Morro Bay visitors agree with the statement. Also with relatively low agreement is the statement, “Addressing environmental problems is more important than addressing economic problems when setting commercial fishing regulations”: 65% of Crescent City visitors, 49% of Monterey visitors, and 46% of Morro Bay visitors agree. Otherwise, majorities agree with all other statements. (For each community, four graphs are shown: the percent *strongly* agreeing, the percent *strongly* or *moderately* agreeing, the percent *strongly* or *moderately* disagreeing, and the percent *strongly* disagreeing. Also included is a graph showing the percent *strongly* or *moderately* agreeing for all communities together, allowing a comparison.)
- Among Crescent City visitors, three statements have notably higher agreement than the rest: “A community’s culture, such as its identity as a fishing village, is worth preserving” (92% agree), “Policy makers should make sure that charter boat opportunities remain available to visitors to the coast” (86% agree), and “Policy makers should make sure that charter boat opportunities remain available to visitors to the coast so that those who don’t own a boat can go out on the water” (86% agree). Also of note is that slightly more agree that “Concerns about commercial fishermen’s livelihoods are important when fishery managers and policy-makers set commercial fishing regulations” than agree that “Addressing environmental problems is more important than addressing economic problems when setting commercial fishing regulations.”
 - Among Monterey and Morro Bay visitors, three statements have notably greater percentages in agreement than the others: “A community’s culture, such as its identity as a fishing village, is worth preserving,” “Concerns about commercial fishermen’s livelihoods are important when fishery managers and policy-makers set commercial fishing regulations,” and “Policy makers should make sure that charter boat opportunities remain available to visitors to the coast so that those who don’t own a boat can go out on the water.” Also of note is that much more in both communities agree that “Concerns

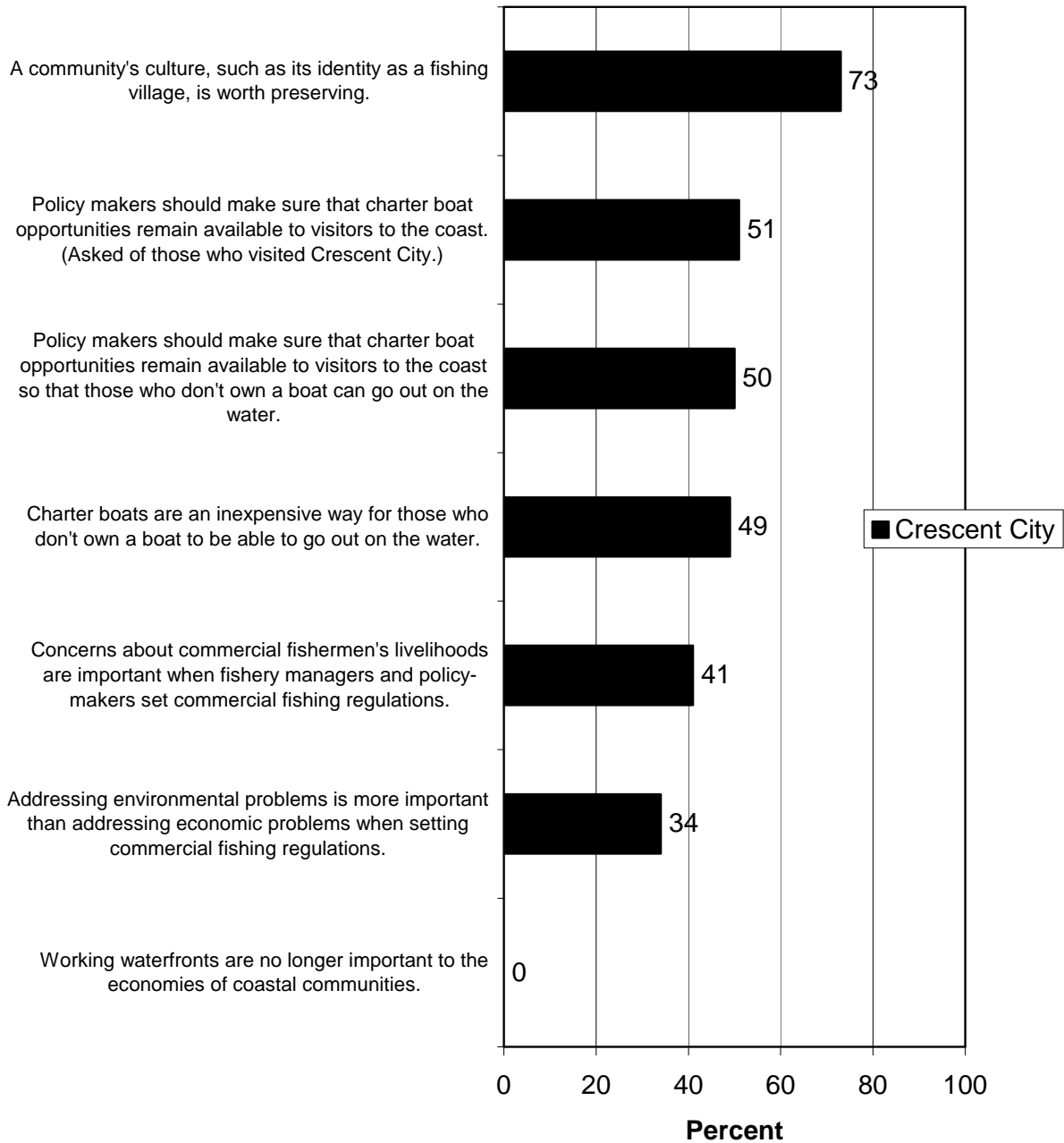
about commercial fishermen's livelihoods are important when fishery managers and policy-makers set commercial fishing regulations" than agree that "Addressing environmental problems is more important than addressing economic problems when setting commercial fishing regulations."

- The survey asked respondents how important in their decision to visit Crescent City, Monterey, or Morro Bay had been being able to visit a working waterfront with a commercial fishing fleet. While visitors to Crescent City were evenly split (45% said it had been important, and 45% said it had been unimportant), visitors to Monterey and Morro Bay more often said it had been important (46% of Monterey visitors; 62% of Morro Bay visitors) than unimportant (21% of Monterey visitors; 12% of Morro Bay visitors). (This graph is shown in the section of this report titled, "Visiting the Waterfronts of Crescent City, Monterey, and Morro Bay"; also note that this individual question is included in the series of questions about the importance of various factors in respondents' decision to visit Crescent City, Monterey, or Morro Bay.)
- Within the series of questions about the importance of factors in decisions to visit restaurants in the three communities are two questions that are worth examining individually. Large majorities of visitors to Crescent City, Monterey, or Morro Bay think it is important when deciding to go to a restaurant to know that the seafood being served is fished in a way that does not endanger the fishery itself: 76% of Crescent City visitors, 79% of Monterey visitors, and 75% of Morro Bay visitors. Additionally, very large majorities think it is important to know that the seafood is caught by local fishermen: 80% of Crescent City visitors, 79% of Monterey visitors, and 81% of Morro Bay visitors.
- Knowledge of fishing methods and the waters from which the fish were caught is fairly low. Majorities of visitors to Crescent City (69%) and Morro Bay (61%) and just less than a majority of visitors to Monterey (48%) indicate that, when they last purchased seafood, they knew a little or nothing at all about the methods that were used to catch it. (Note that the question did *not* pertain to seafood purchased specifically in Crescent City, Monterey, or Morro Bay—it simply asked about the last time the respondent purchased seafood—but this

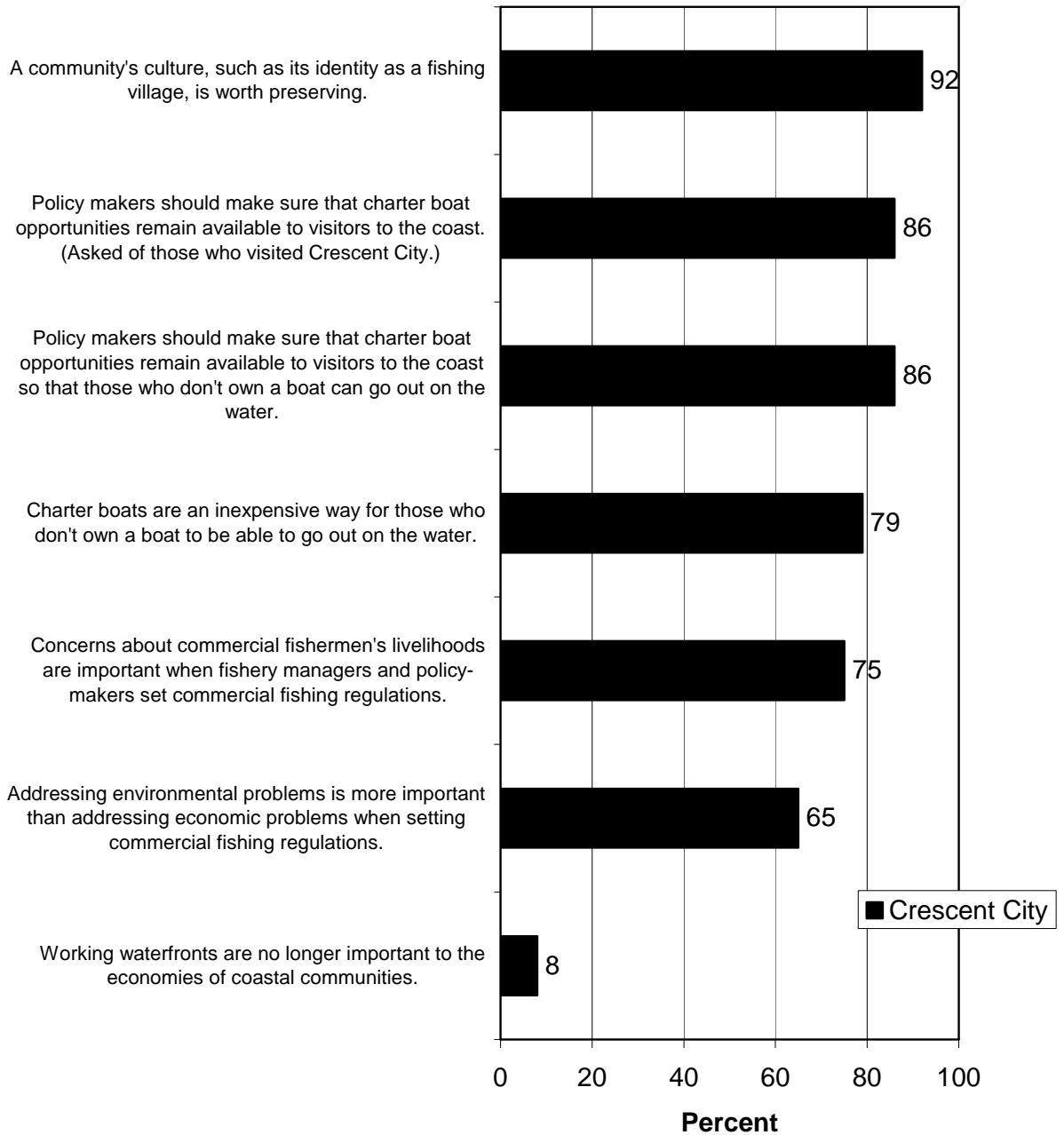
does not necessarily mean that the seafood was *not* purchased in one of those communities.) In another question regarding knowledge of seafood, less than a majority of visitors to each community knew from which waters their last seafood that they purchased was caught: 37% of Crescent City visitors, 40% of Monterey visitors, and 43% of Morro Bay visitors.

- Those who indicated knowing from which waters their last seafood that they purchased was caught were asked if it came from the Pacific Ocean; in both Monterey and Morro Bay, a majority said that they did not know. Likewise, except among Monterey visitors, the most common answer to the question, “Did it [the seafood last purchased] come from near-shore waters or deep-sea waters,” was that the respondent did not know.
- Another question asked respondents how much they knew about whether the last seafood they purchased had come from a fishery that has strong fishery regulations. lack of knowledge was high, as only 10% of Crescent City visitors, 25% of Monterey visitors, and 14% of Morro Bay visitors indicated knowing “a whole lot” or “some” about whether the last seafood they purchased had come from a fishery that has strong fishery regulations.

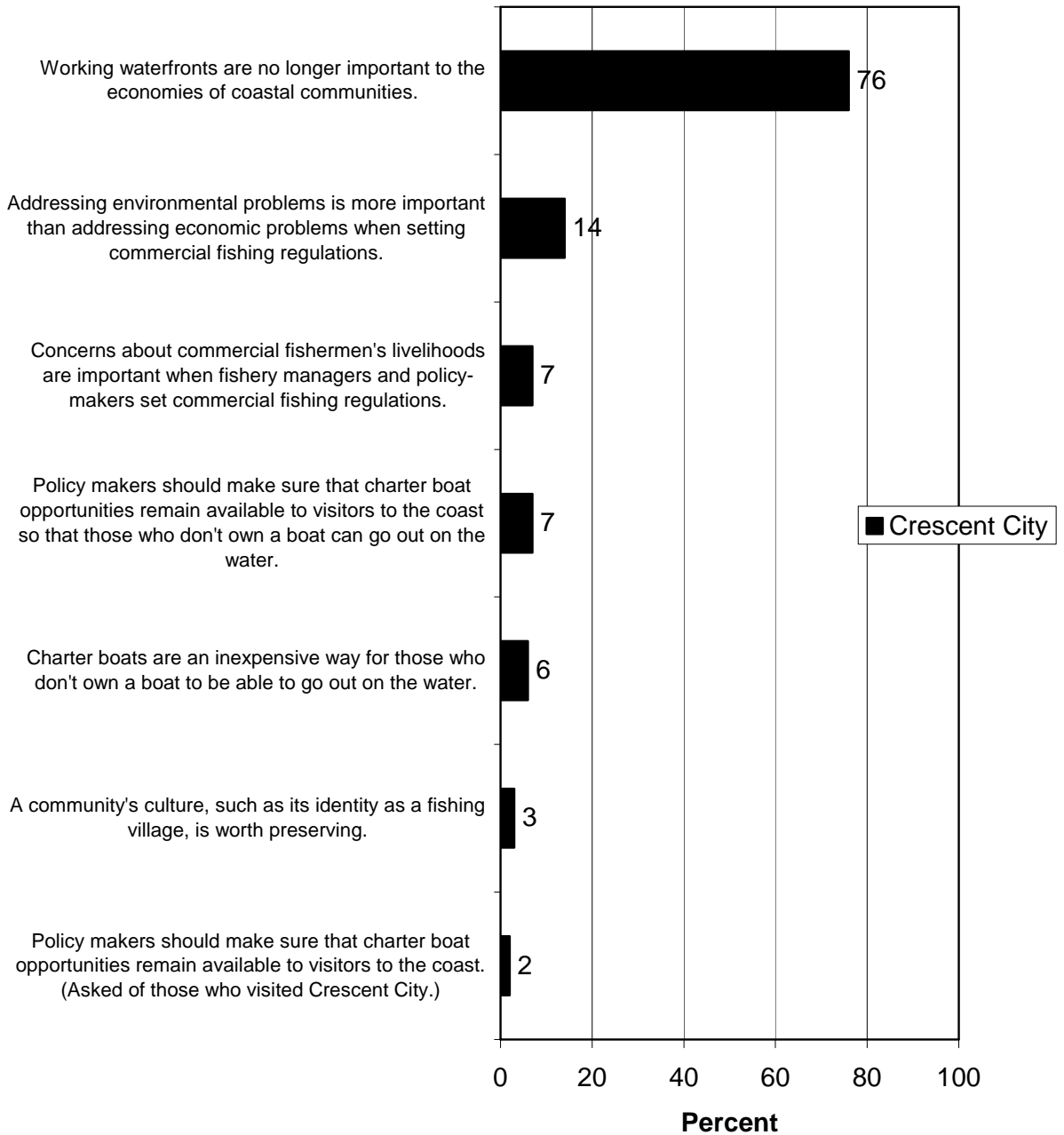
Percent who strongly agree with the following statements on the economy and water-related industry.



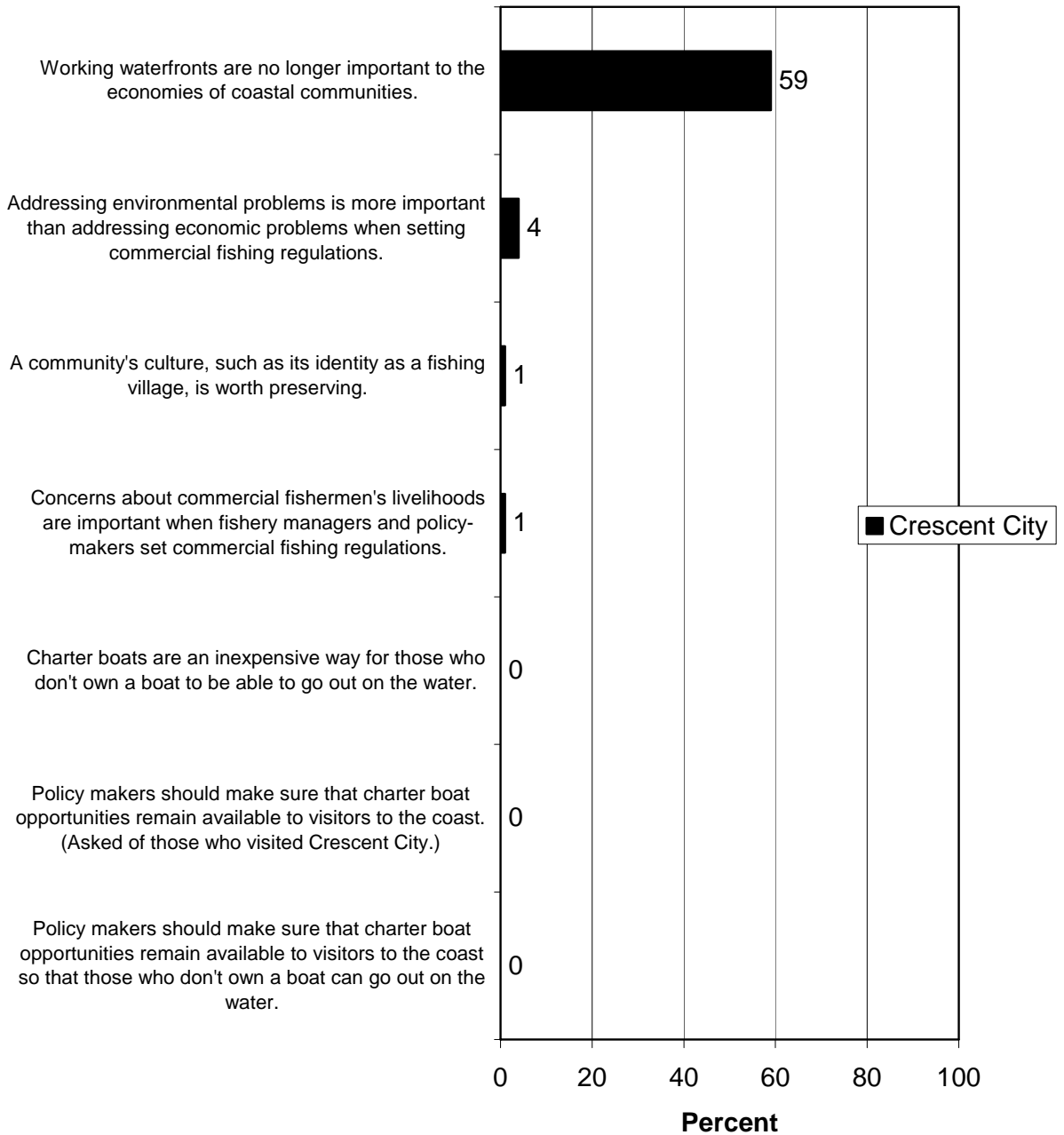
Percent who strongly or moderately agree with the following statements on the economy and water-related industry.



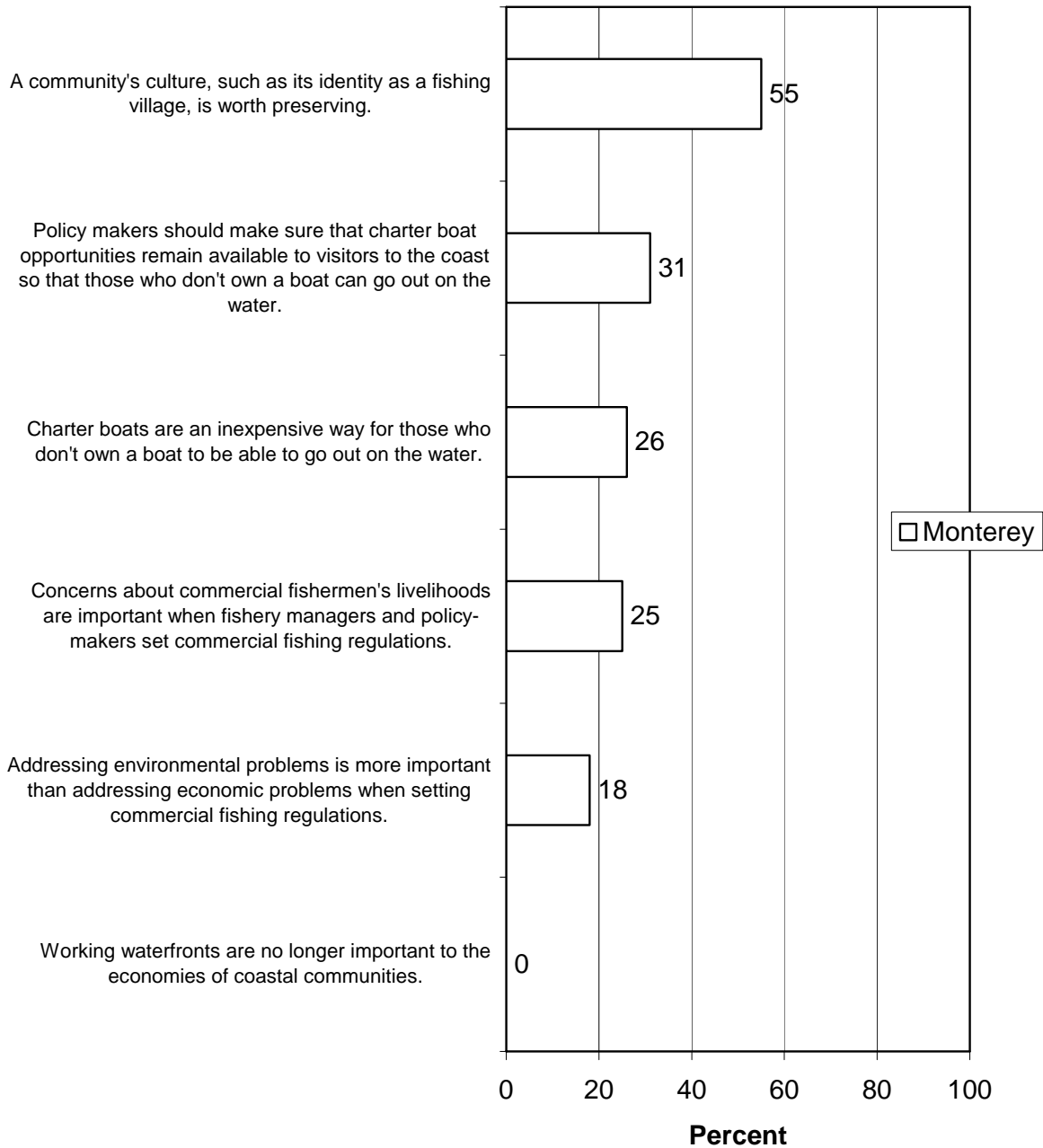
Percent who moderately or strongly disagree with the following statements on the economy and water-related industry.



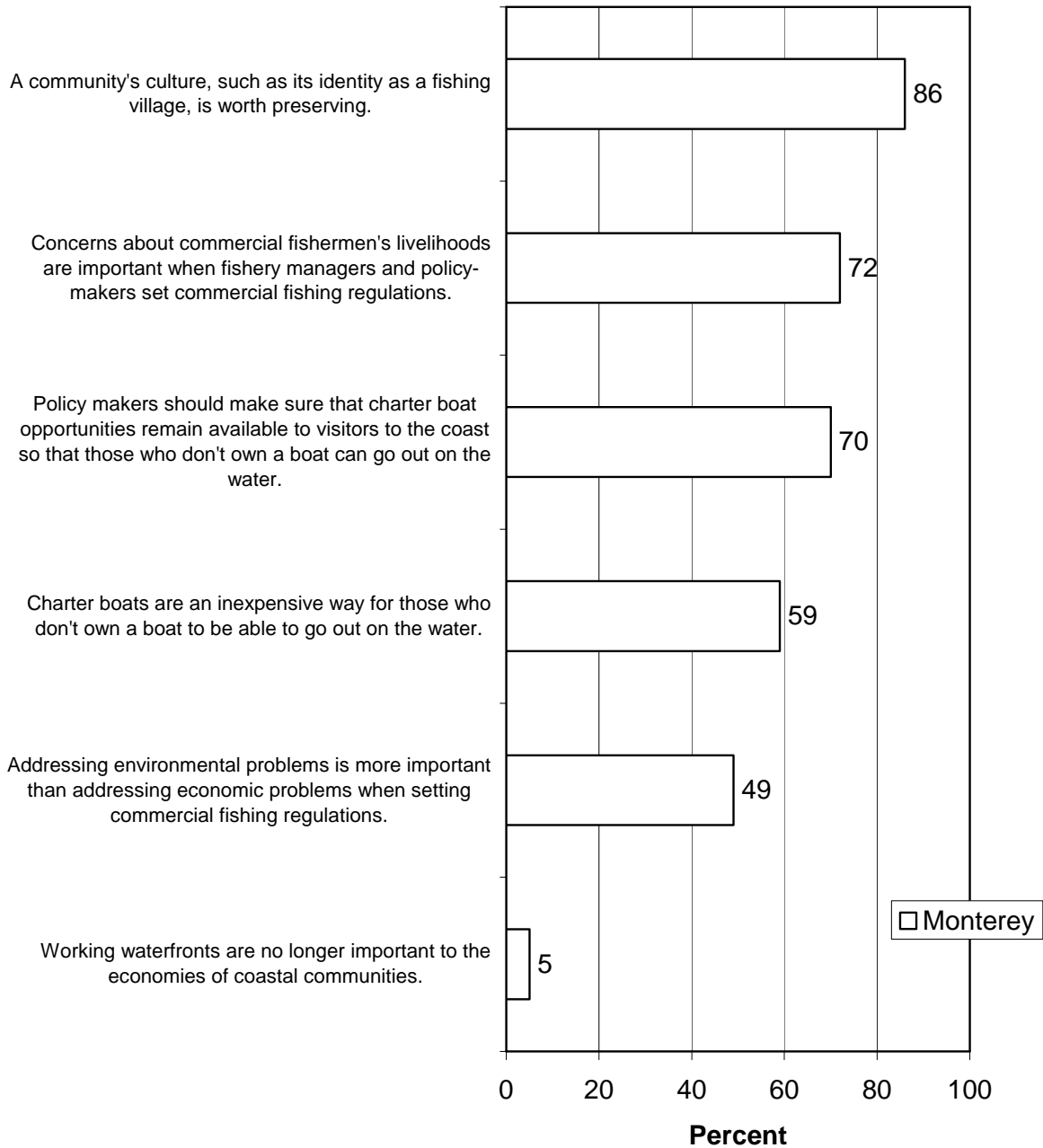
Percent who strongly disagree with the following statements on the economy and water-related industry.



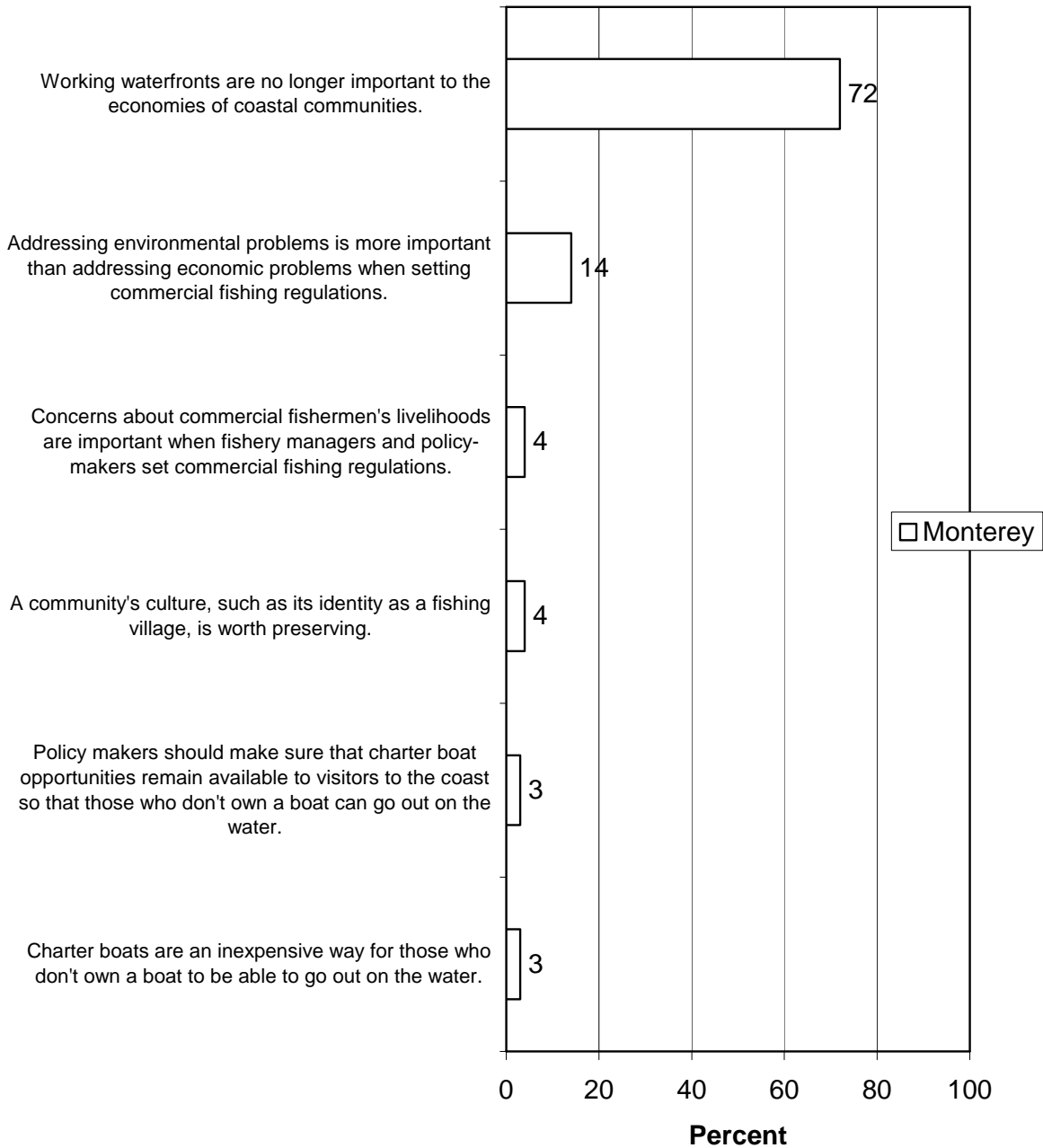
Percent who strongly agree with the following statements on the economy and water-related industry.



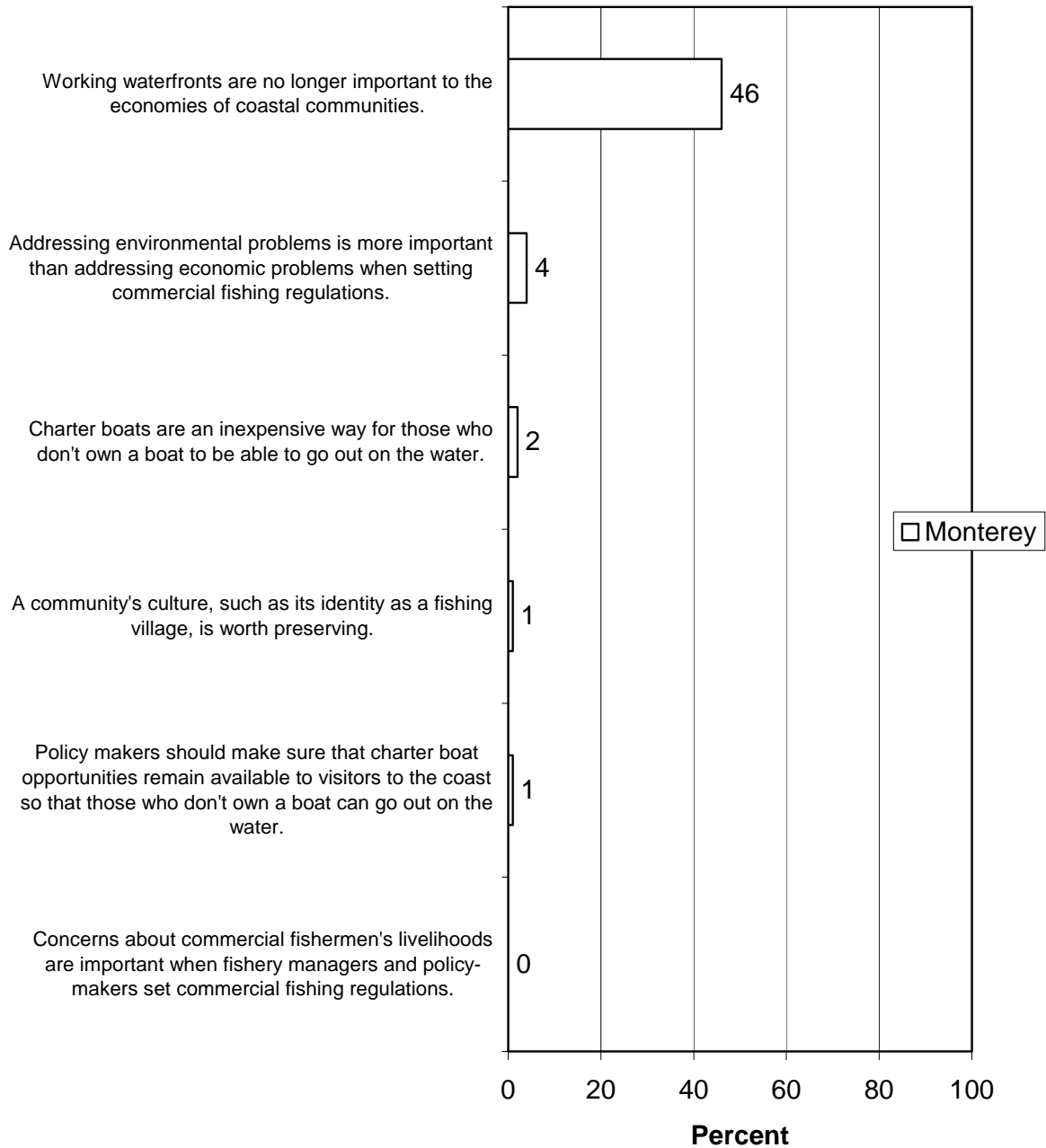
Percent who strongly or moderately agree with the following statements on the economy and water-related industry.



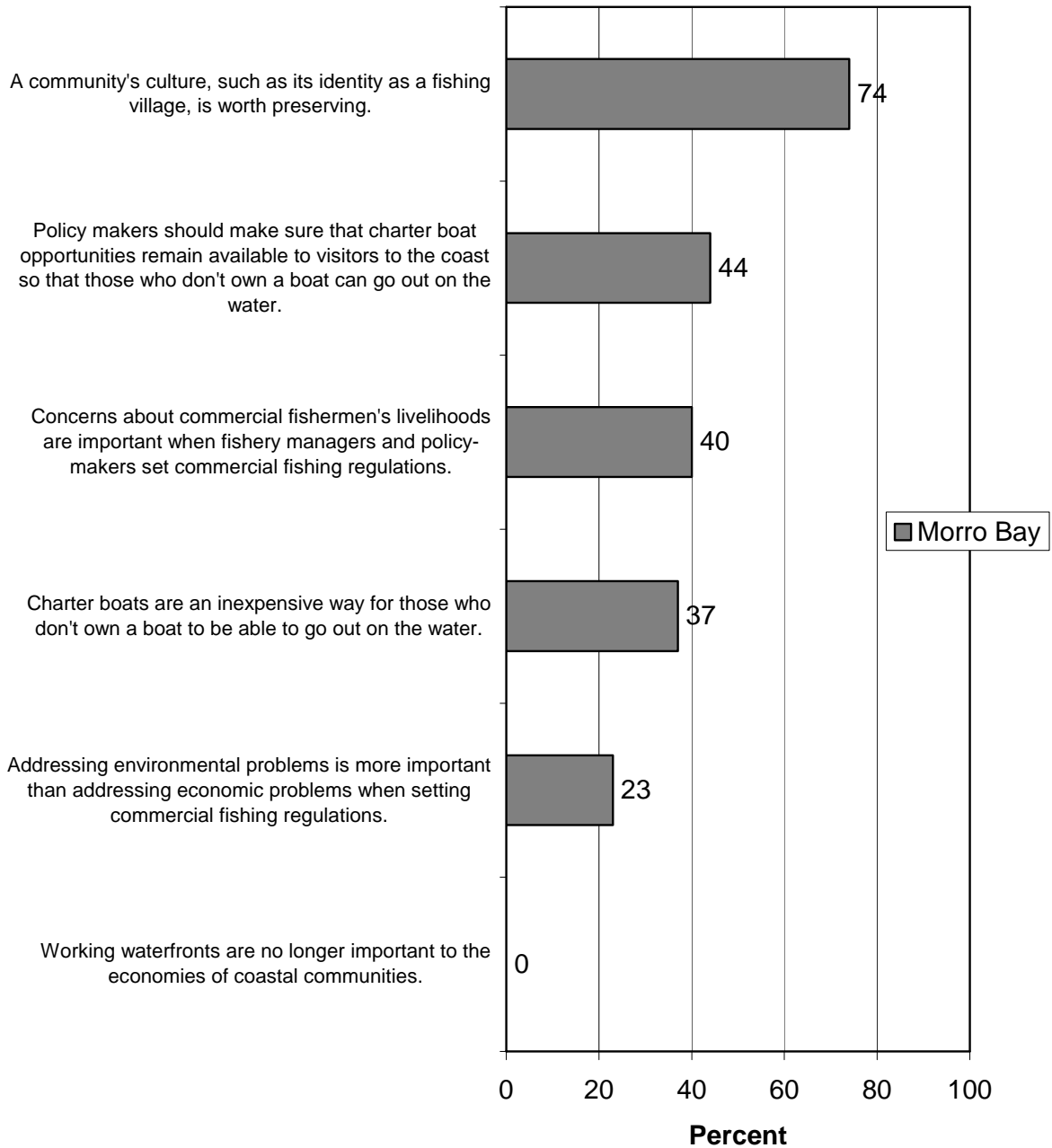
Percent who moderately or strongly disagree with the following statements on the economy and water-related industry.



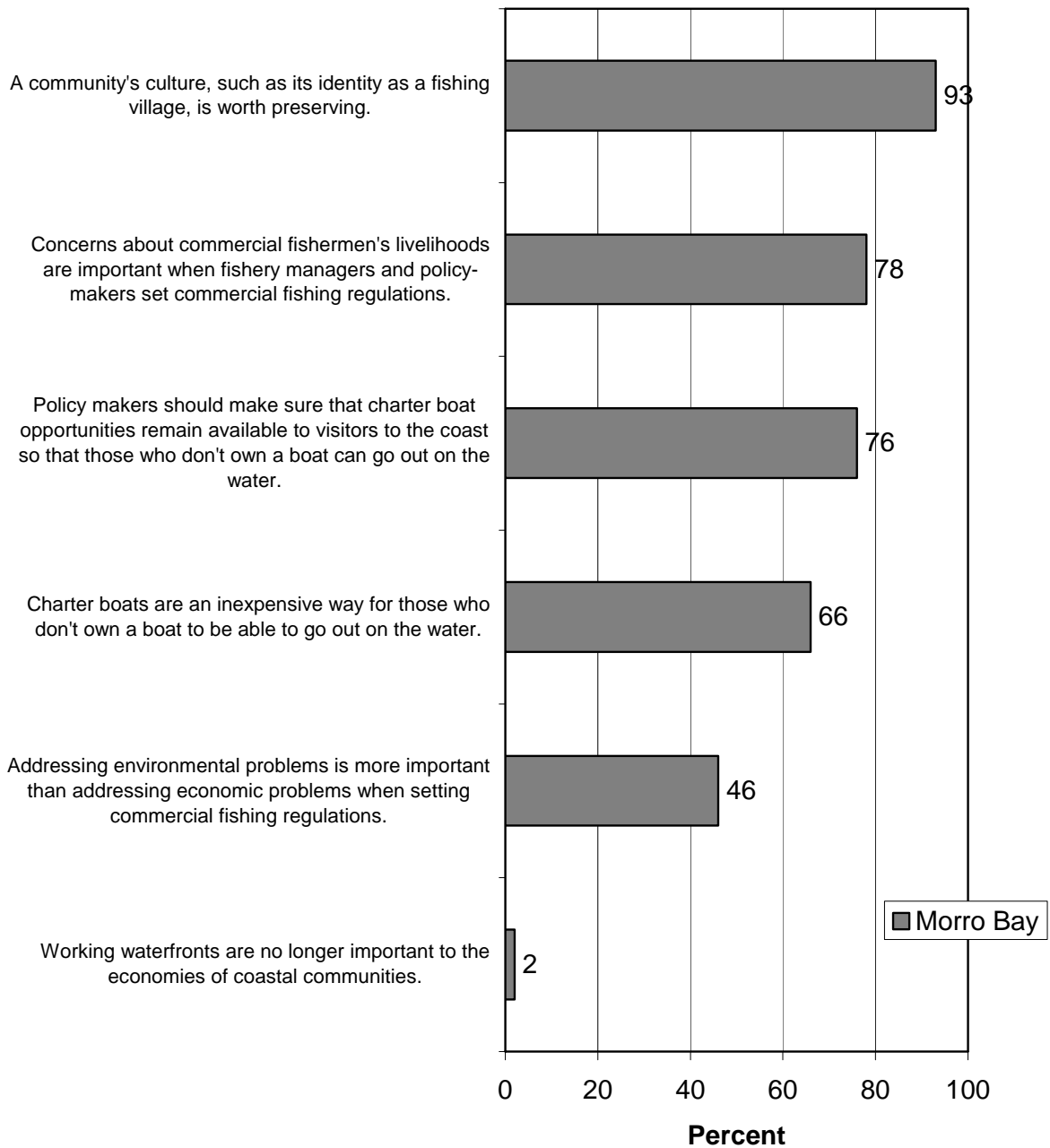
Percent who strongly disagree with the following statements on the economy and water-related industry.



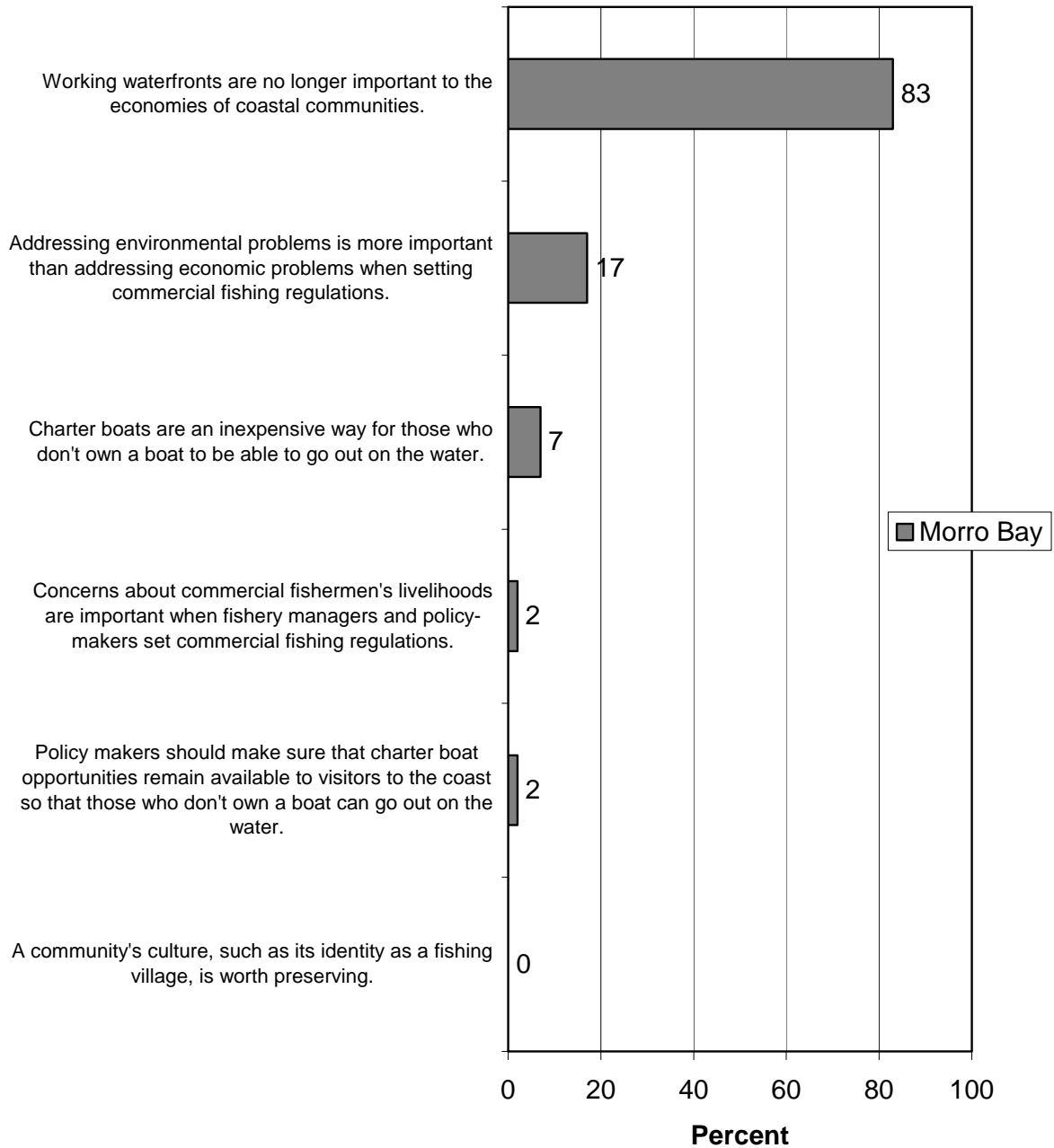
Percent who strongly agree with the following statements on the economy and water-related industry.



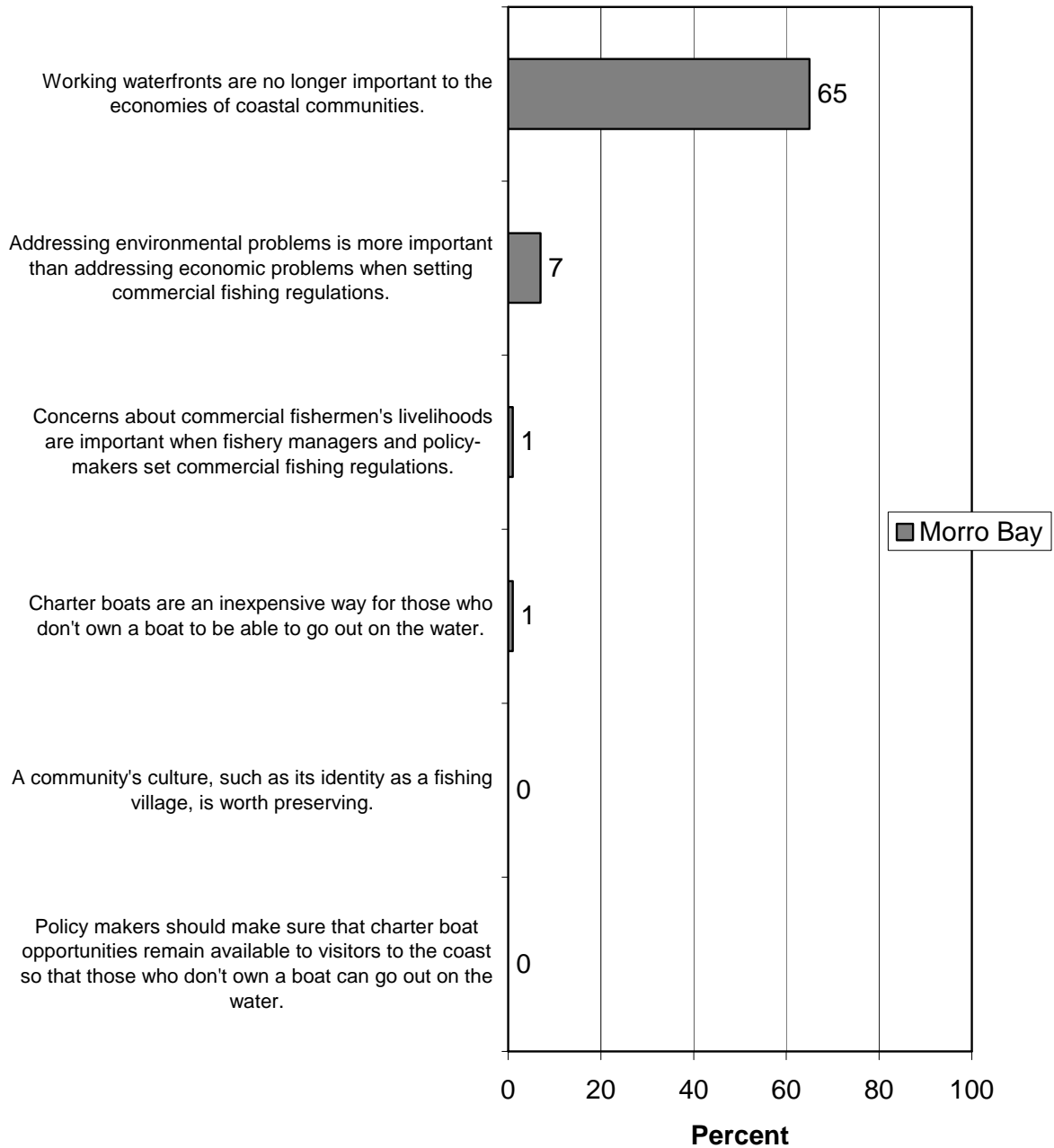
Percent who strongly or moderately agree with the following statements on the economy and water-related industry.



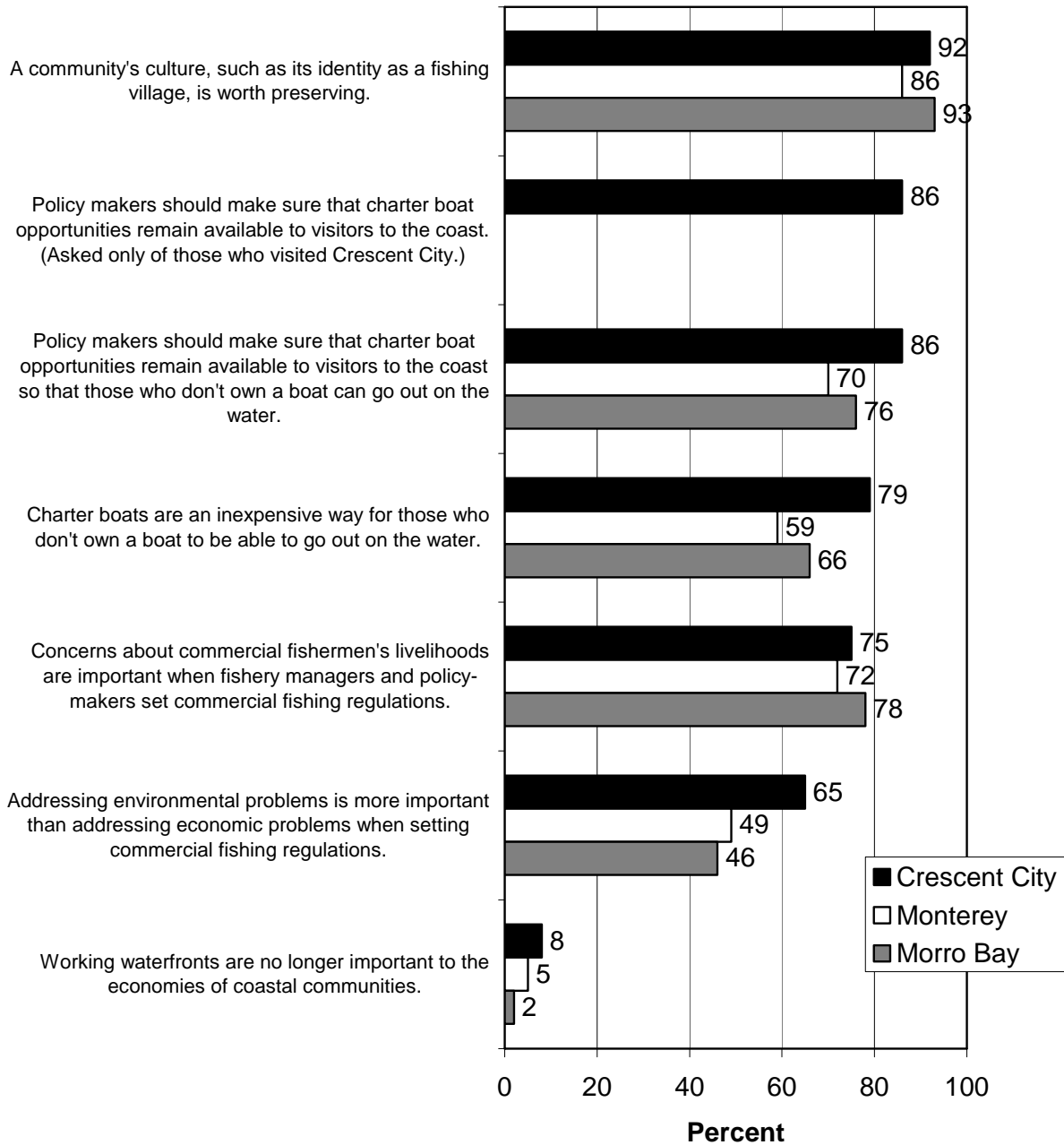
Percent who moderately or strongly disagree with the following statements on the economy and water-related industry.



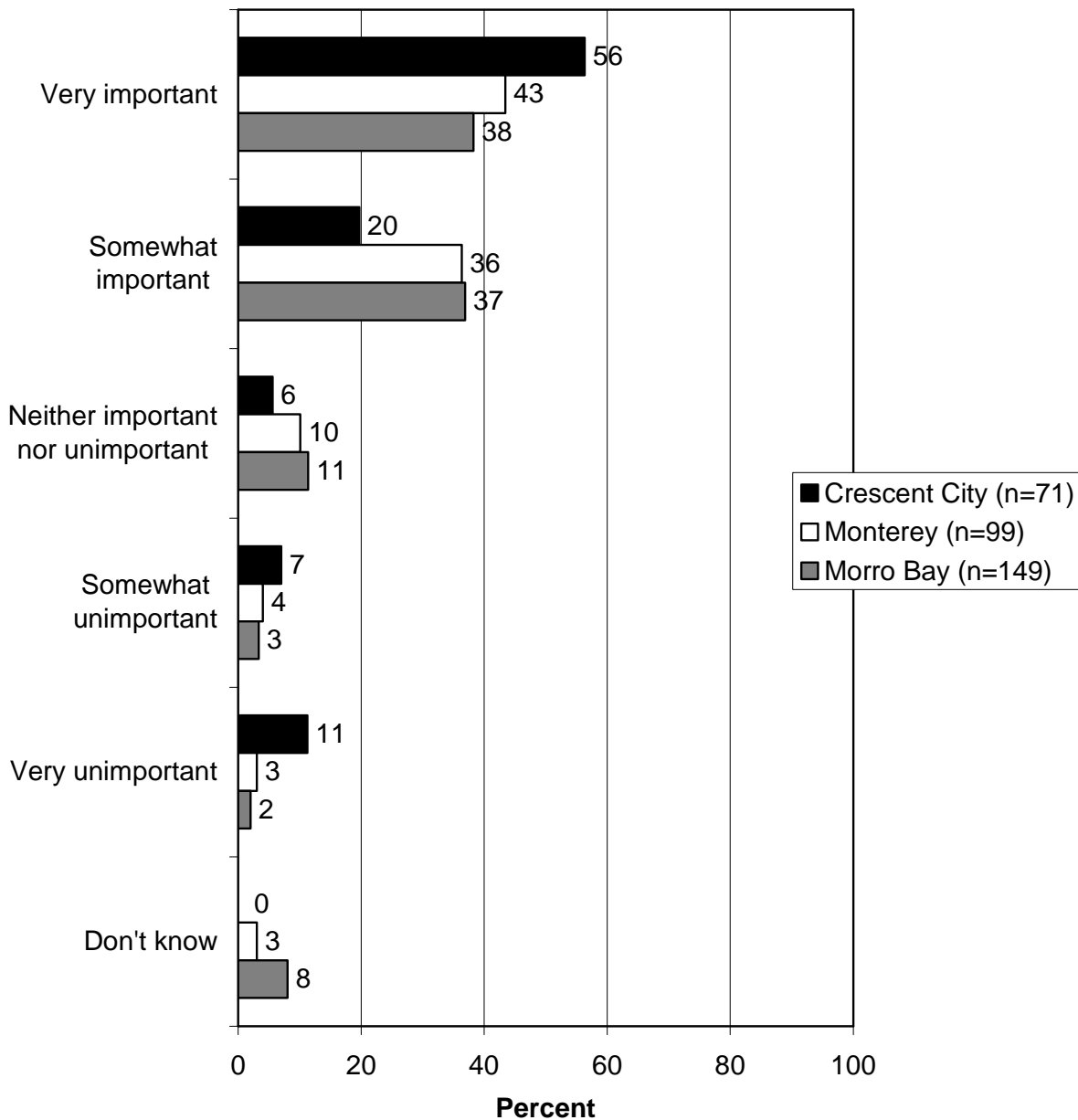
Percent who strongly disagree with the following statements on the economy and water-related industry.



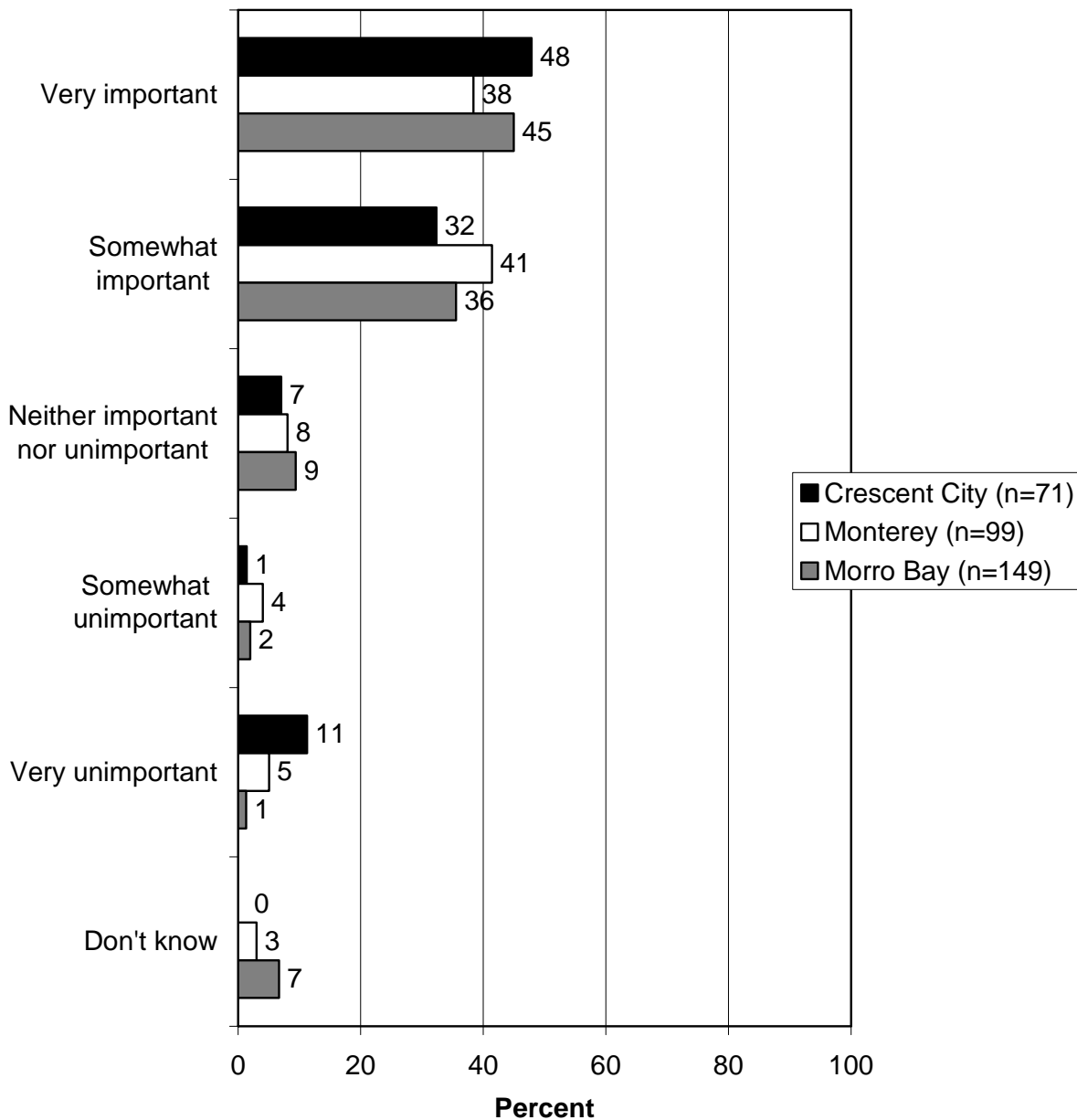
Percent who strongly or moderately agree with the following statements on the economy and water-related industry.



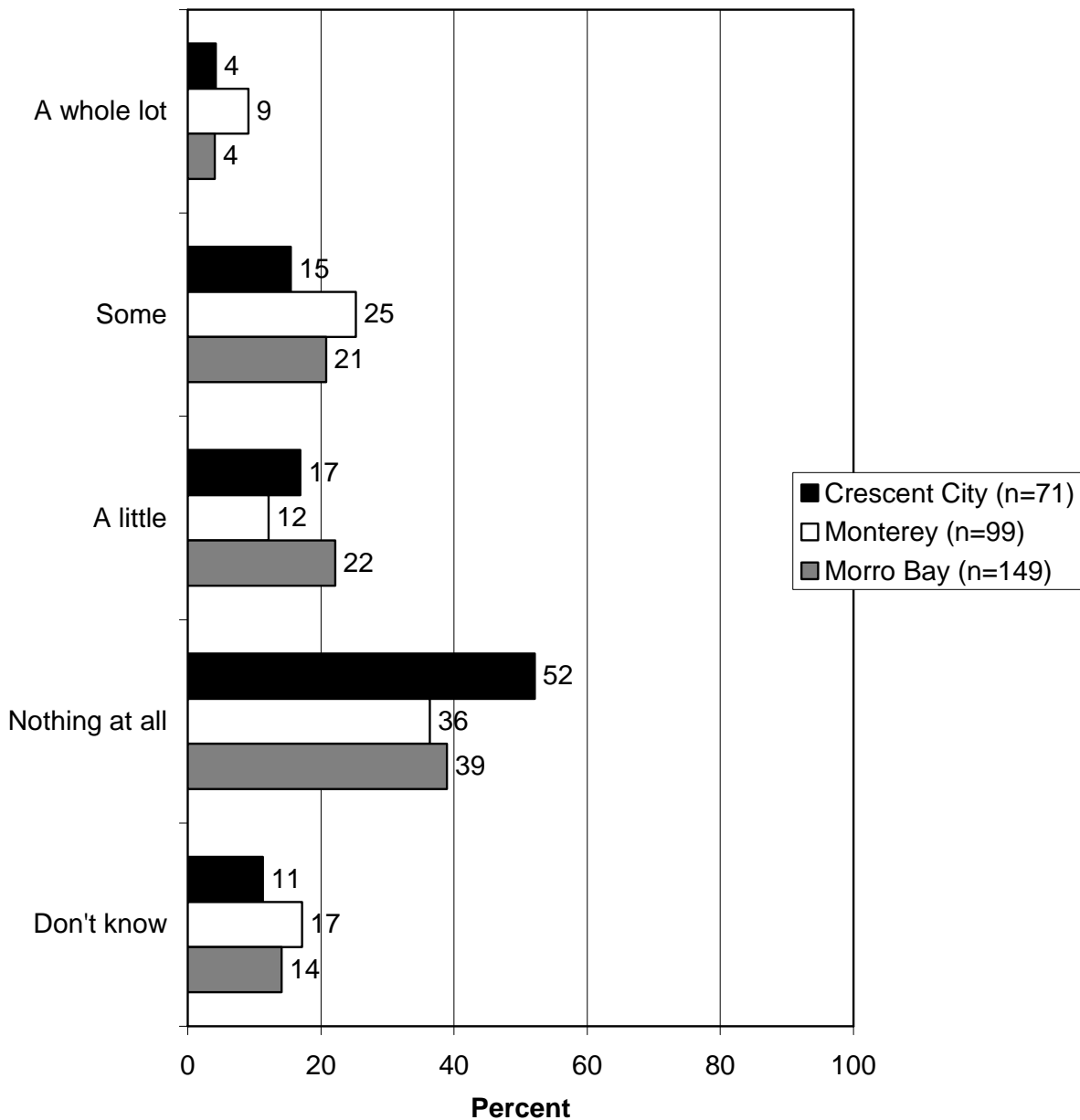
Q46. What about knowing that the seafood being served is fished in way that doesn't endanger the fishery itself? (How important or unimportant would this be if you were to do to a restaurant in Crescent City / Monterey / Morro Bay?)



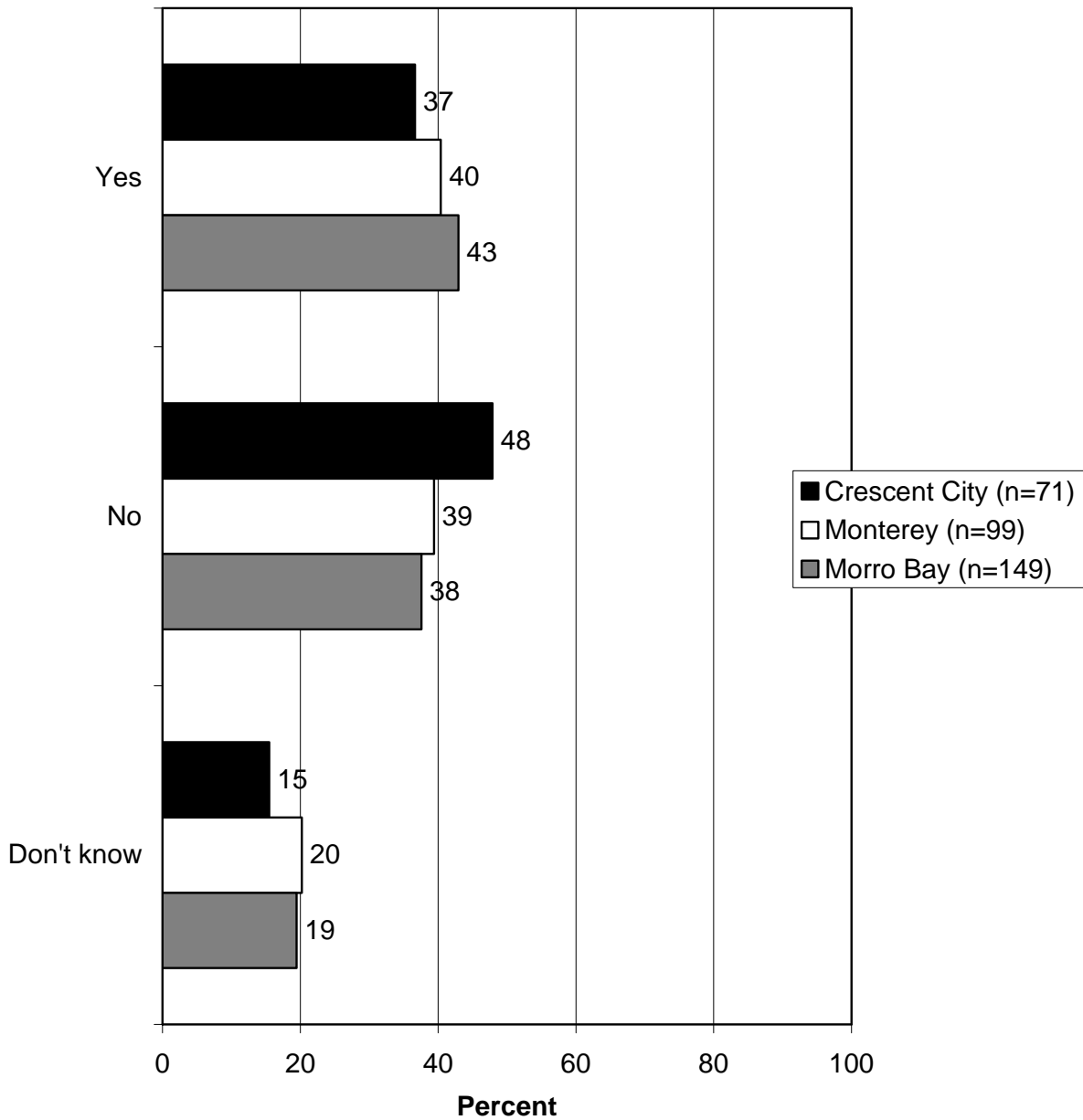
Q47. What about knowing that the seafood is caught by local fishermen? (How important or unimportant would this be if you were to do to a restaurant in Crescent City / Monterey / Morro Bay?)



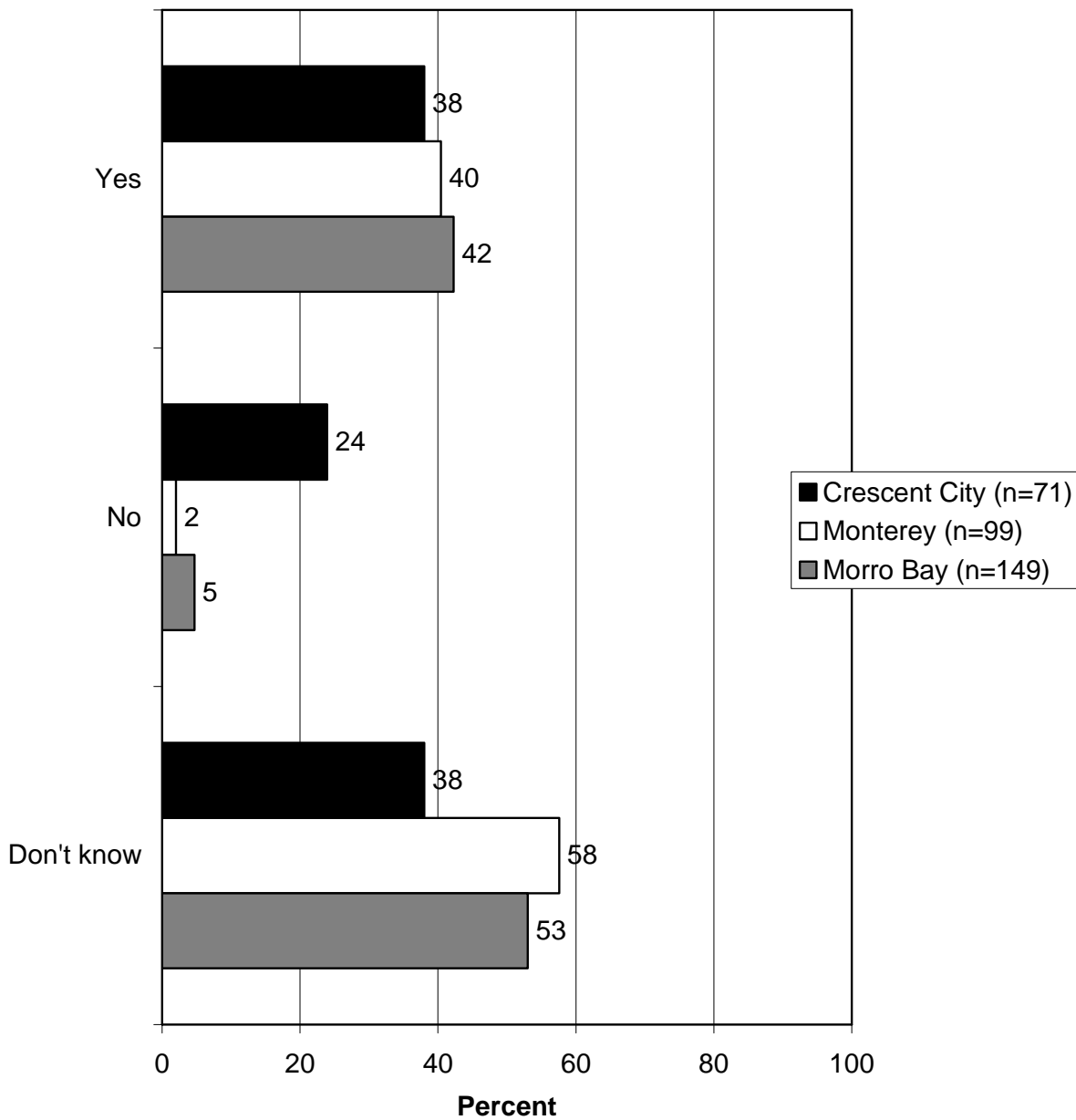
Q69. When you last purchased fresh seafood, how much did you know about the methods that were used to catch it?



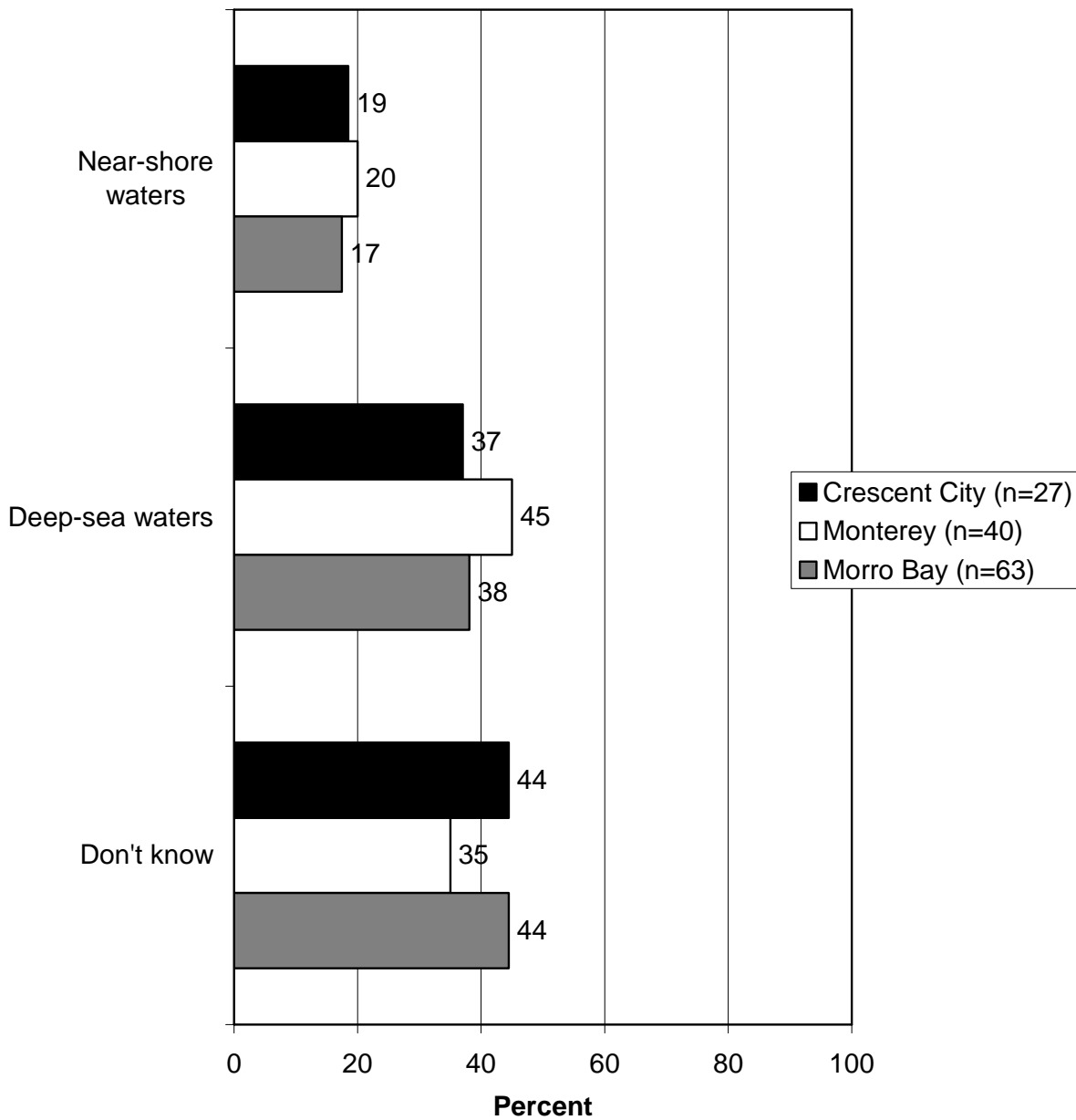
Q70. When you last purchased fresh seafood, did you know which waters it came from?



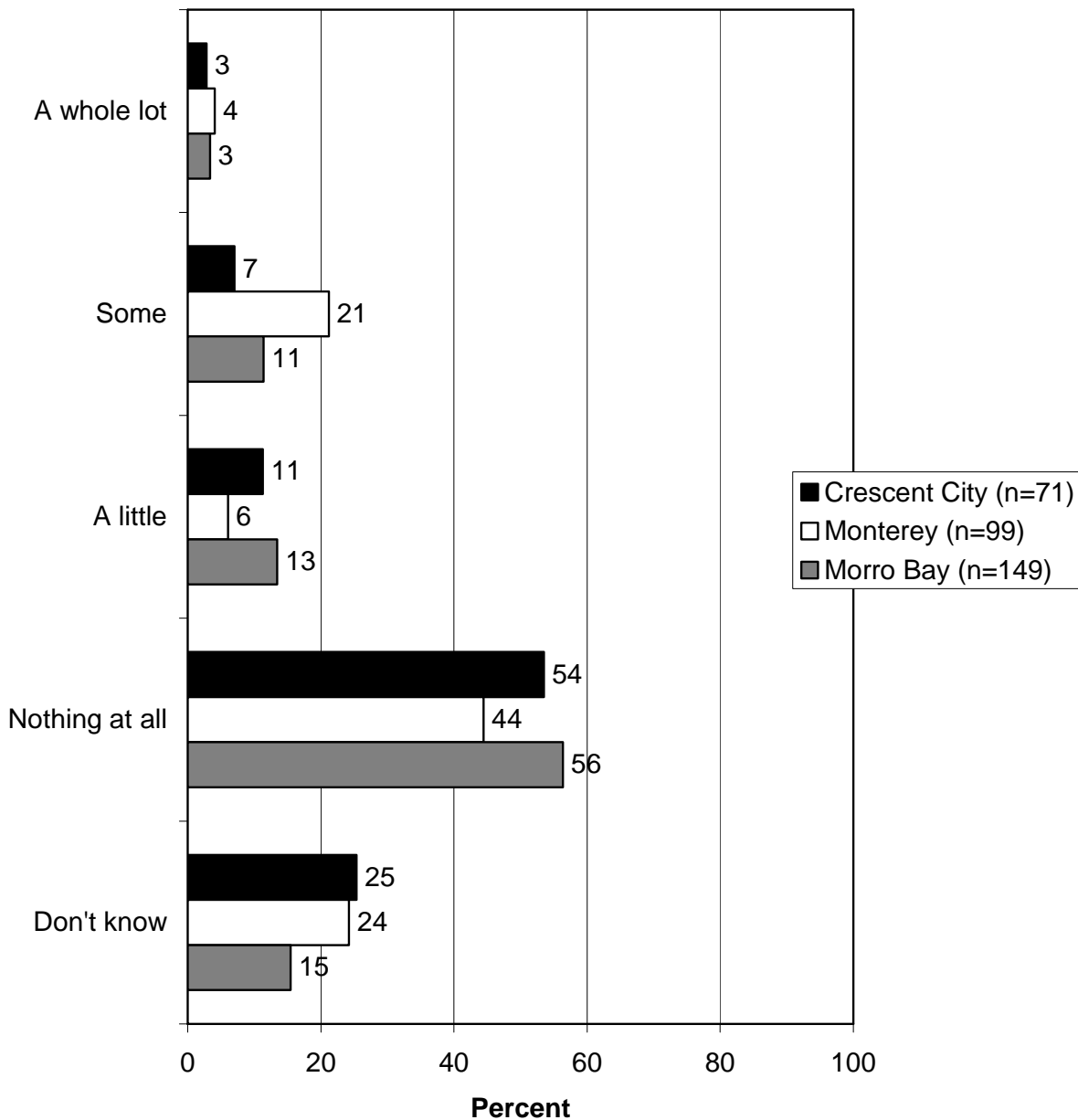
Q71. Did it come from the Pacific Ocean?



Q72. Did it come from near-shore waters or deep-sea waters? (Asked of those whose last fresh seafood purchase was from the Pacific Ocean.)



Q73. When you last purchased fresh seafood, how much did you know about whether or not it came from a fishery that has strong fishery regulations?

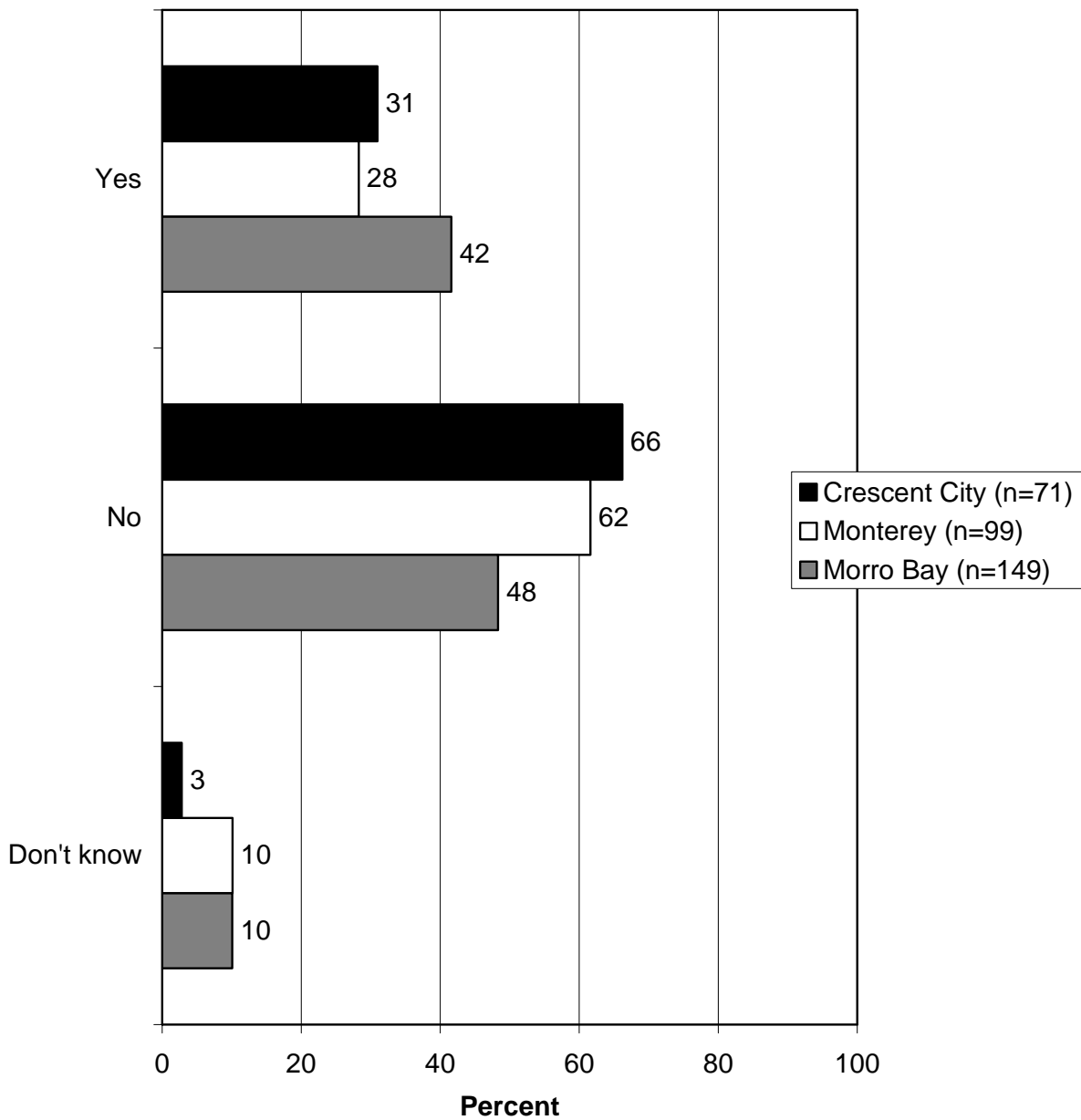


OPINIONS ON RECREATIONAL FISHING

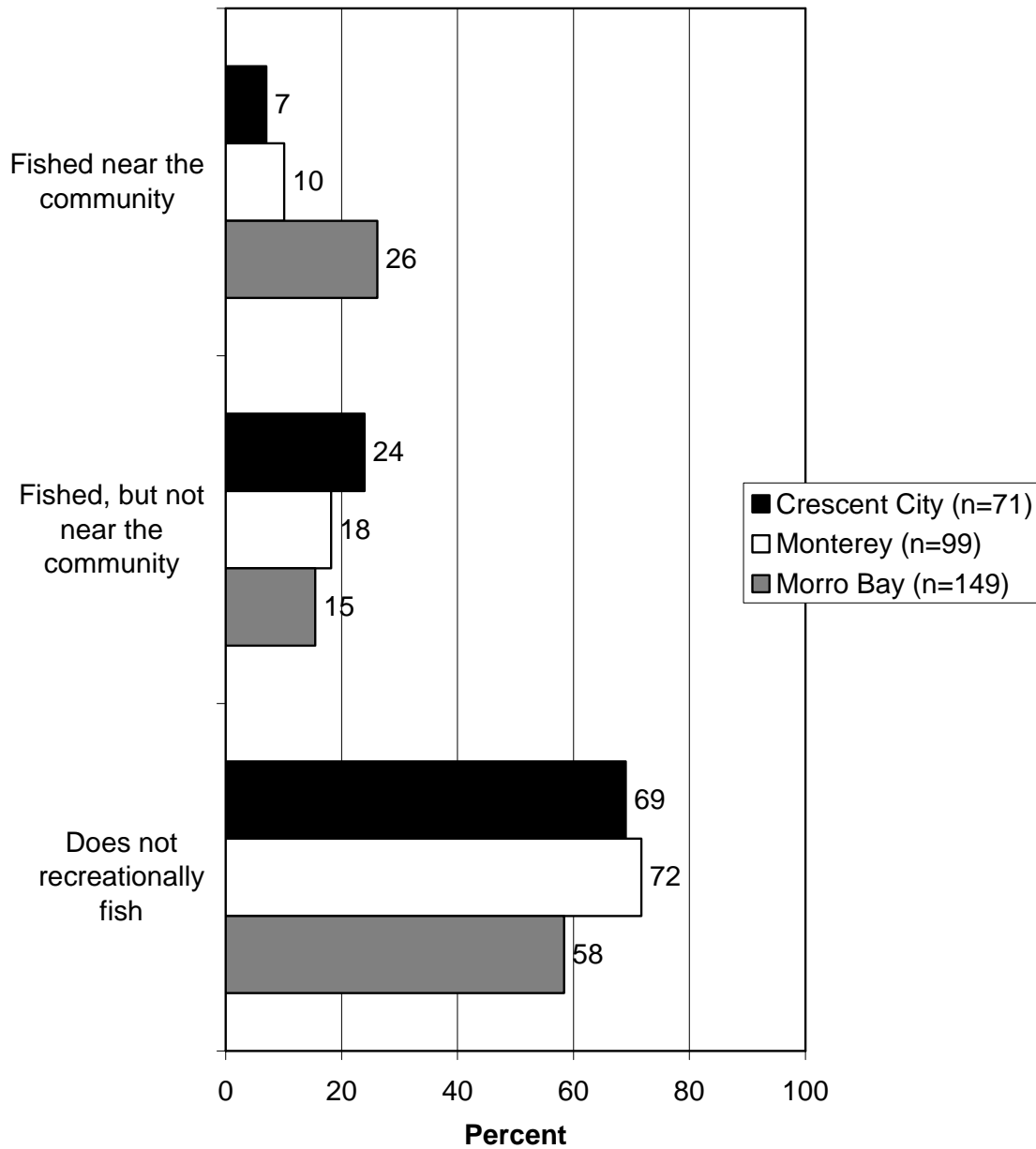
- In a basic question about recreational fishing, the survey found that 31% of Crescent City visitors, 28% of Monterey visitors, and 42% of Morro Bay visitors recreationally fish (although not necessarily at those locations). Regarding fishing near those locations, 7% of visitors to Crescent City fished near there, 10% of visitors to Monterey fished near there, and 26% of visitors to Morro Bay fished near there. Also, 20% of Crescent City visitors, 20% of Monterey visitors, and 36% of Morro Bay visitors fish in saltwater at least some of the time.

- Large majorities of respondents agree that charter boats are an inexpensive way for those who do not own a boat to be able to go out on the water: 79% of Crescent City visitors, 58% of Monterey visitors, and 67% of Morro Bay visitors.
 - This question was crosstabulated by those who recreationally fish and those who do not. Not surprisingly, those who recreationally fish are much more likely than are those who do not fish to agree that charter boats are an inexpensive way for those who do not own a boat to be able to go out on the water (note that the crosstabulation shows all respondents together rather than broken down by community).

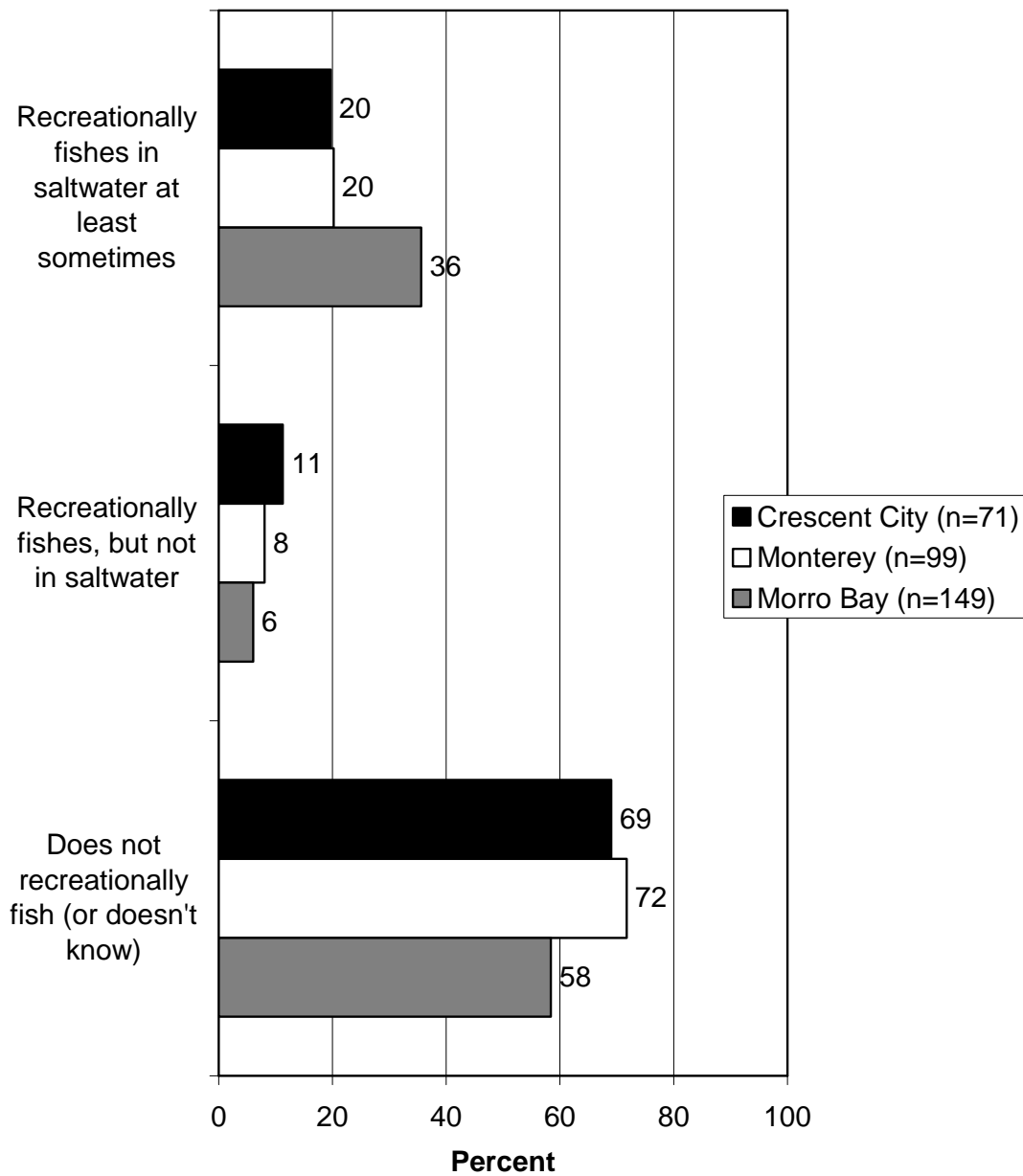
Q85. Do you recreationally fish?



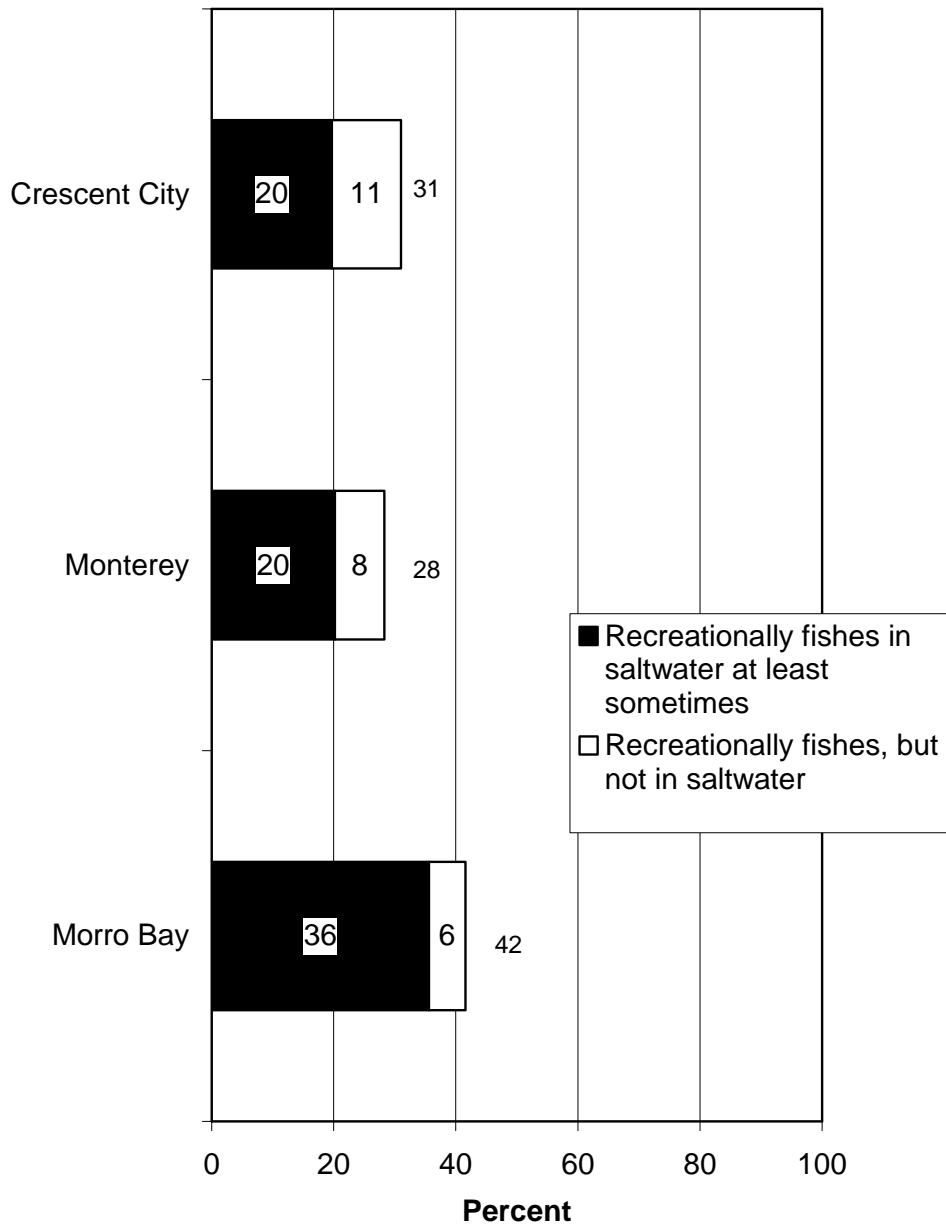
Q86. Have you ever fished near Monterey / Morro Bay / Crescent City? (Among all respondents.)



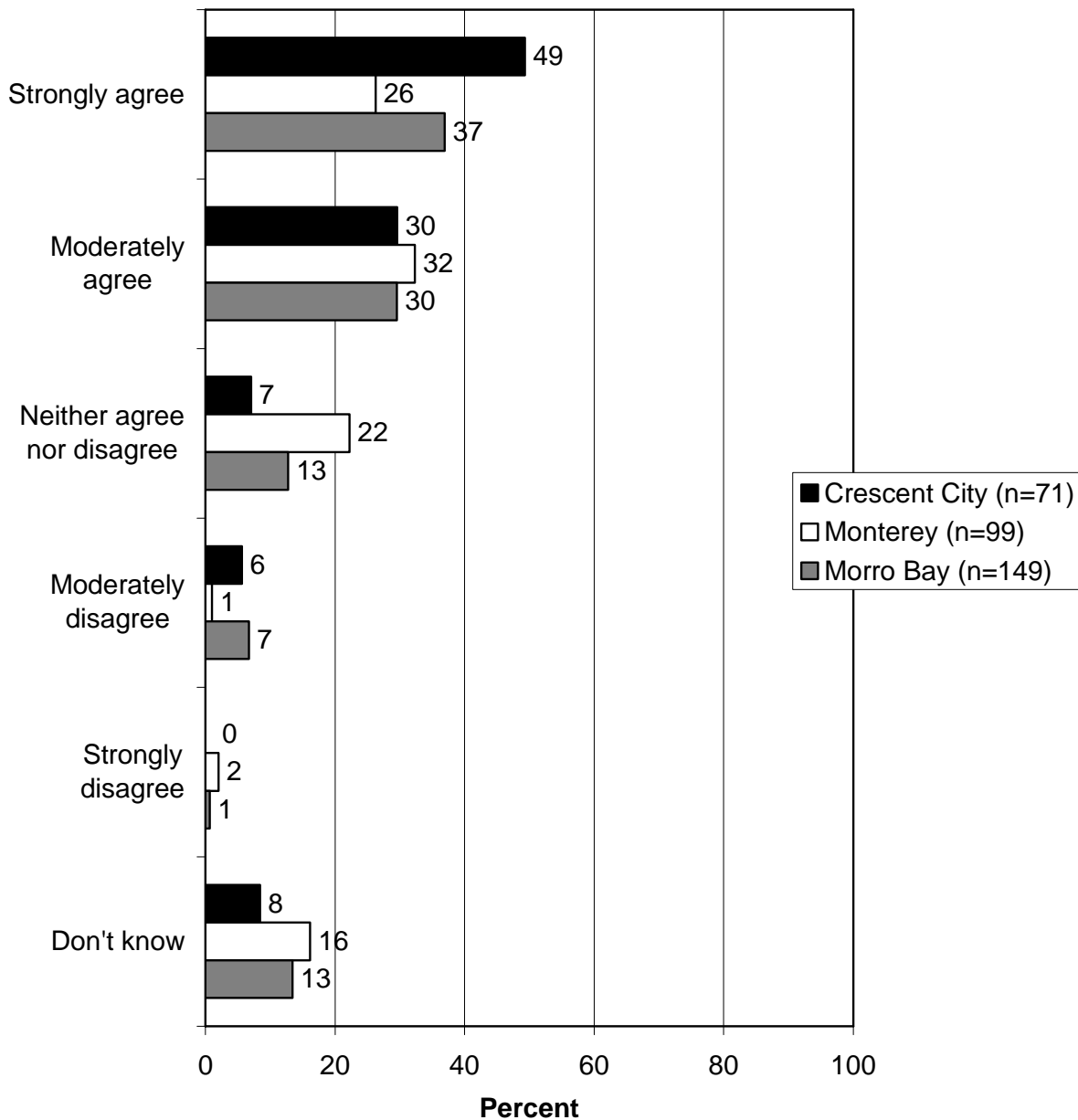
Q87. Do you ever fish in saltwater? (Among all respondents.)



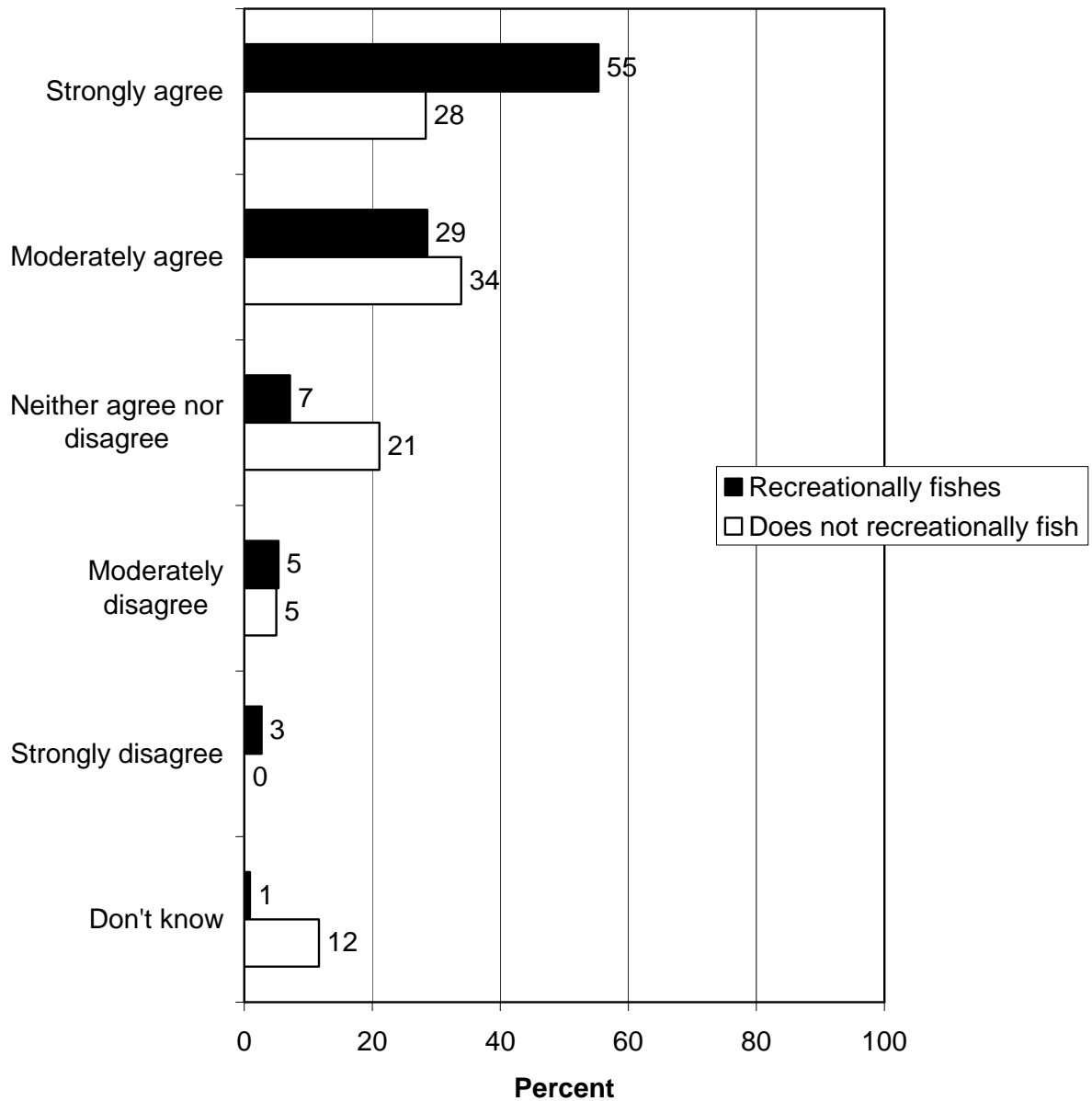
Q87. Do you ever fish in saltwater? (Among all respondents.)



Q62. Charter boats are an inexpensive way for those who don't own a boat to be able to go out on the water. (Do you agree or disagree with this statement?)



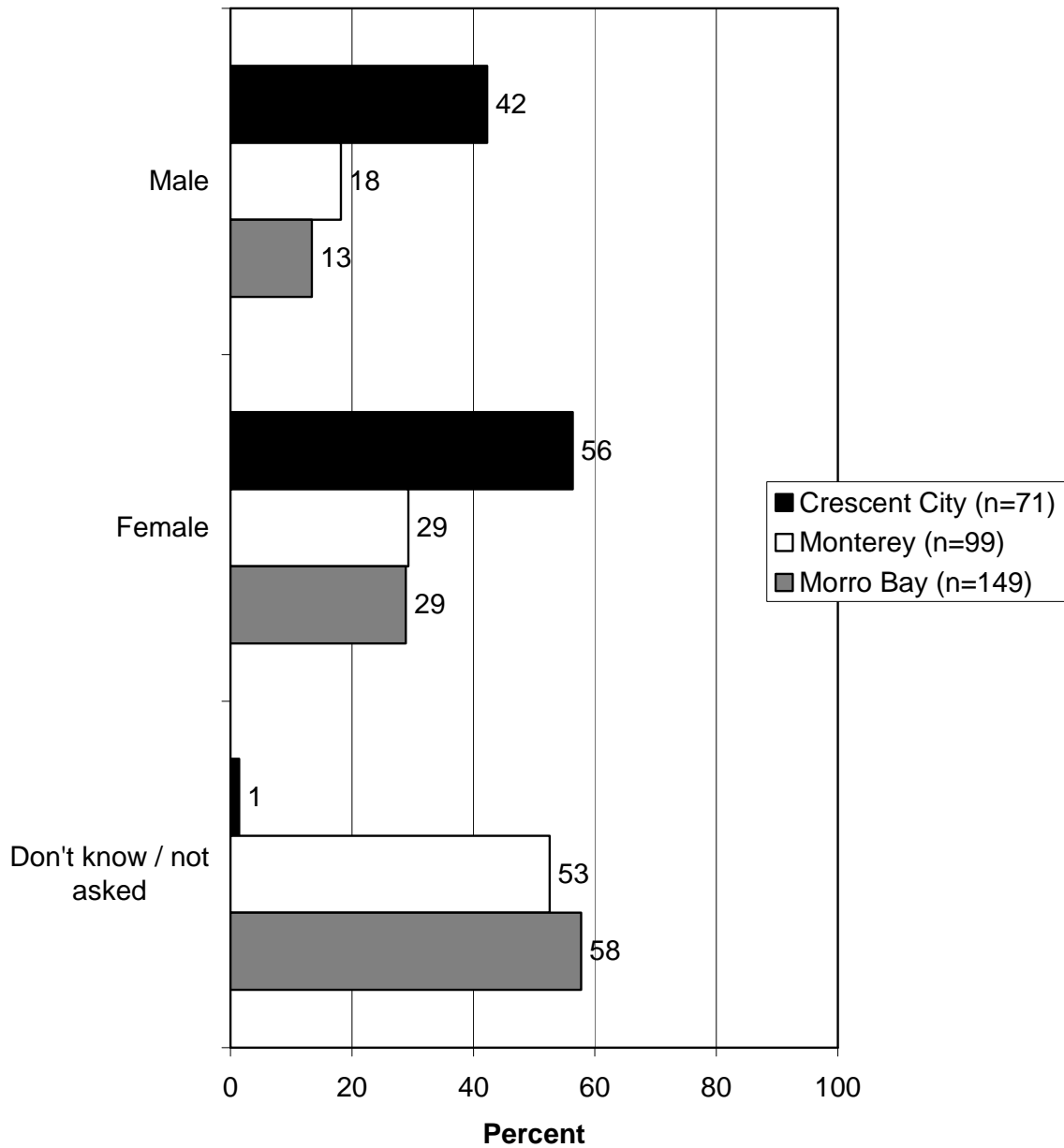
Q62. Charter boats are an inexpensive way for those who don't own a boat to be able to go out on the water.



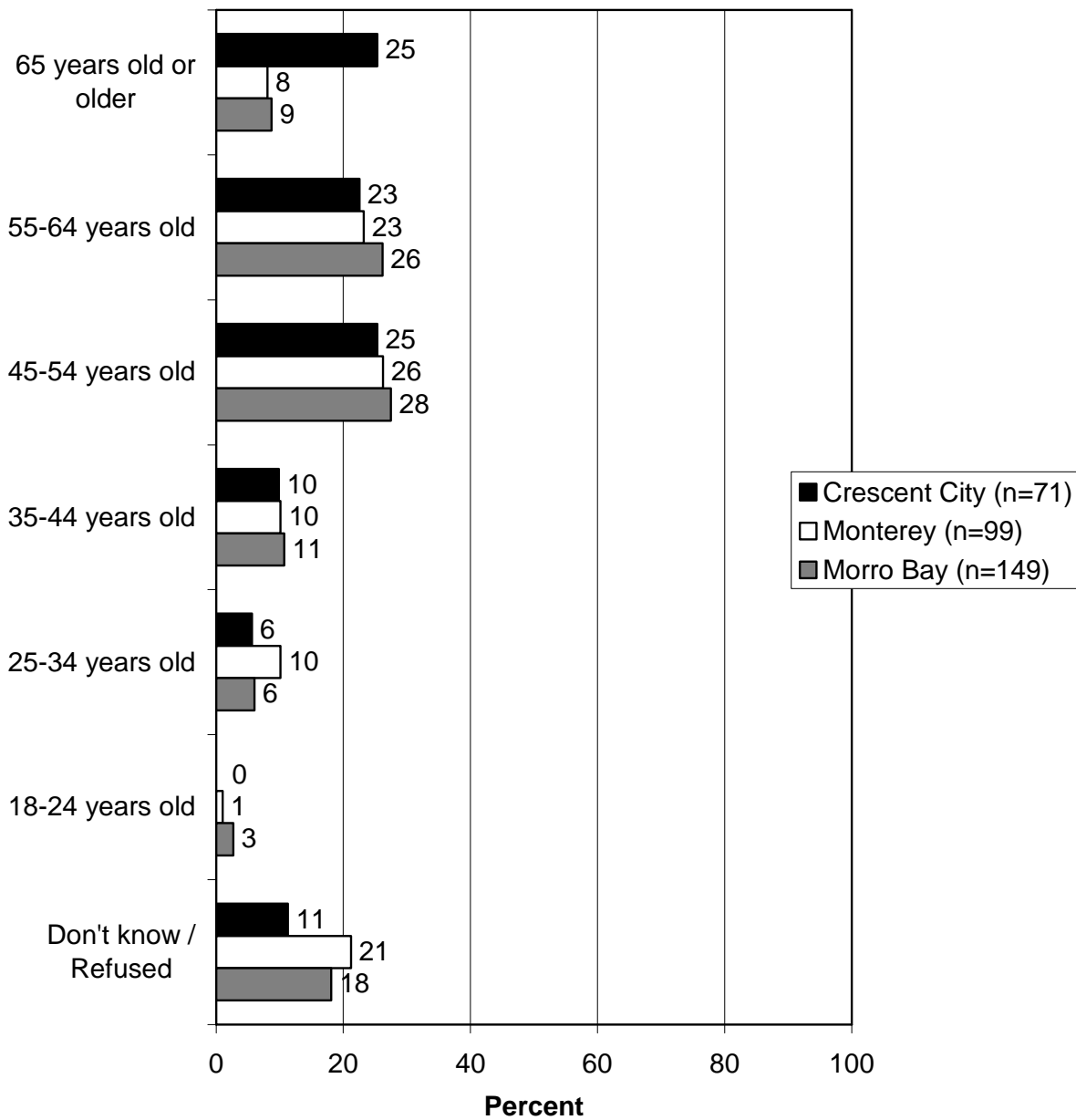
DEMOGRAPHIC DATA

- The gender of respondents are shown (the online surveys did not gather gender data, which explains the large percentages of “don’t know” responses in Monterey and Morro Bay).
- Respondents’ ages are shown, slightly skewed to the older age categories, which is to be expected of a sample of tourists.
- The ethnic backgrounds of respondents are shown; the majority consider themselves white or Caucasian.
- Educational levels of respondents are shown.
- Occupations of respondents are shown. A relatively large percentage are retired.
- Household incomes are shown.
- The graph of the number of people in households is shown; most commonly, one other person lives with the respondent. The number of children in the households is also shown. Large majorities of visitors to the communities do not have children 17 years old or younger living at home.
- Graphs show the distance from the coast and the distance from Crescent City, Monterey, or Morro Bay that respondents live.
 - For Crescent City visitors, the mean distance they live from the coast is 804.7 miles, and the median distance is 350 miles. The mean distance they live from Crescent City is 1,402.4 miles, and the median distance is 1,000 miles.
 - For Monterey visitors, the mean distance they live from the coast is 177.5 miles, and the median distance is 30 miles. The mean distance they live from Monterey is 501.2 miles, and the median distance is 200 miles.
 - For Morro Bay visitors, the mean distance they live from the coast is 191.9 miles, and the median distance is 60 miles. The mean distance they live from Morro Bay is 459.2 miles, and the median distance is 200 miles.

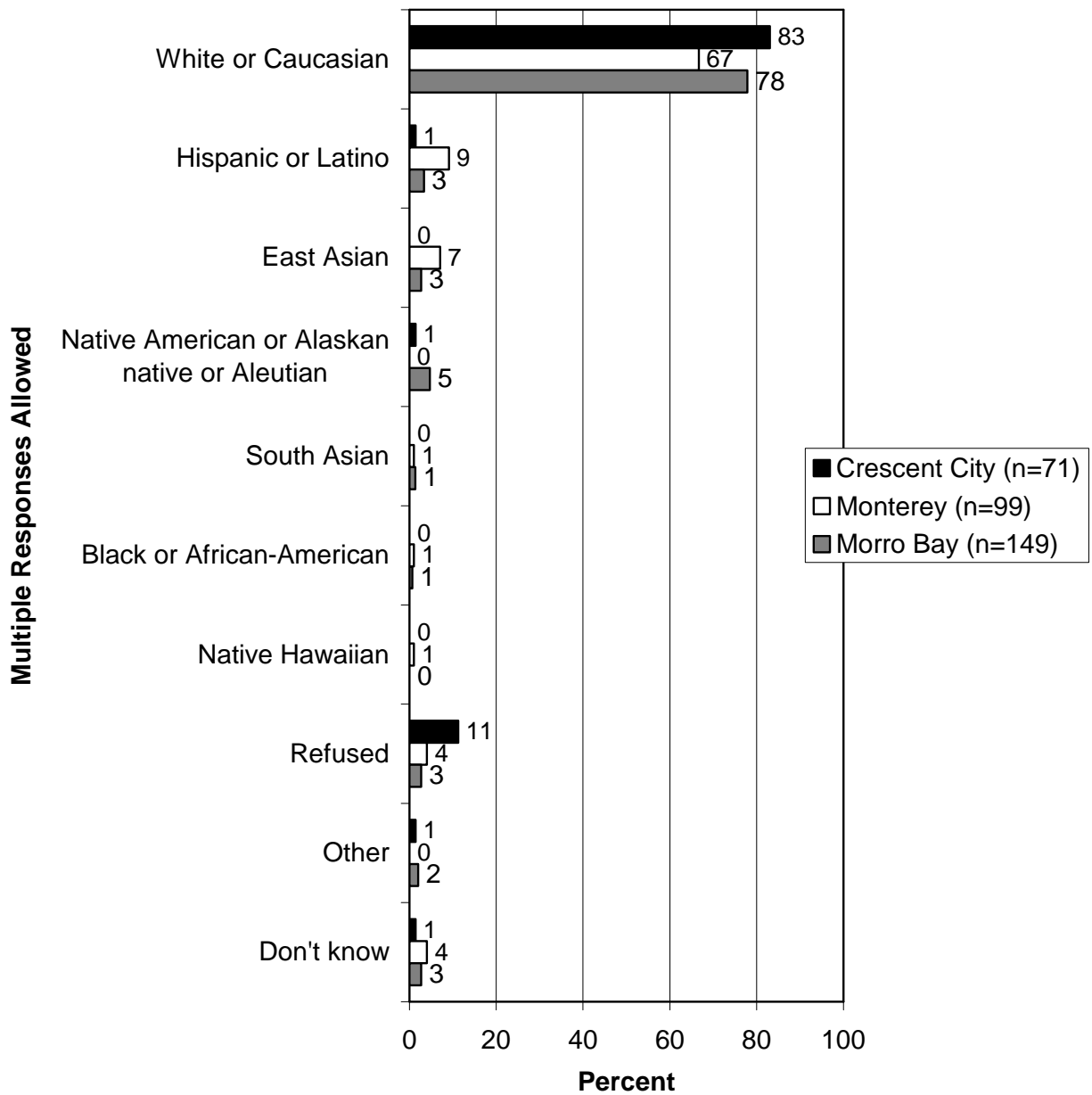
Q113. Respondent's gender (not asked, but observed by interviewer).



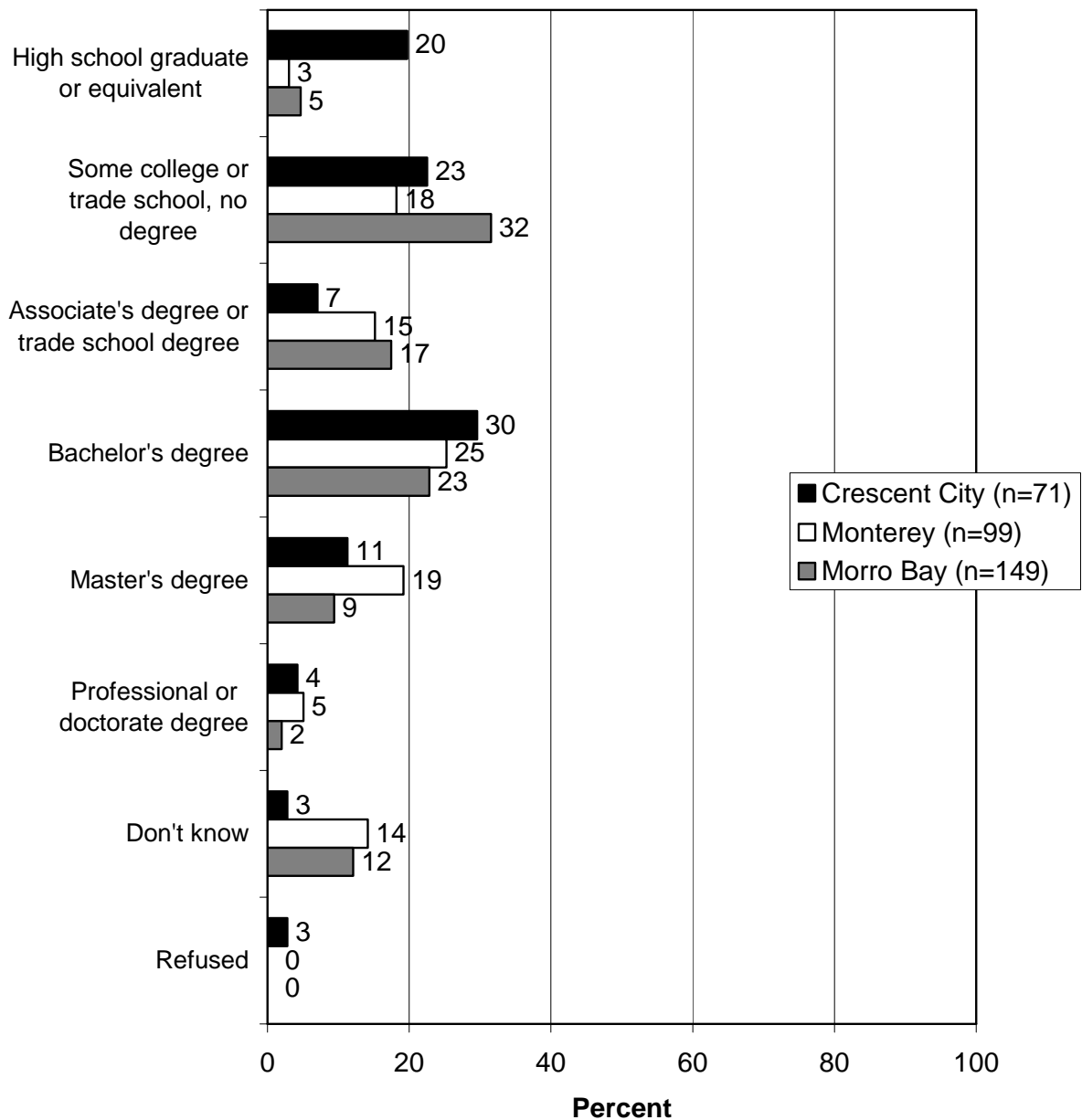
Q107. Respondent's age.



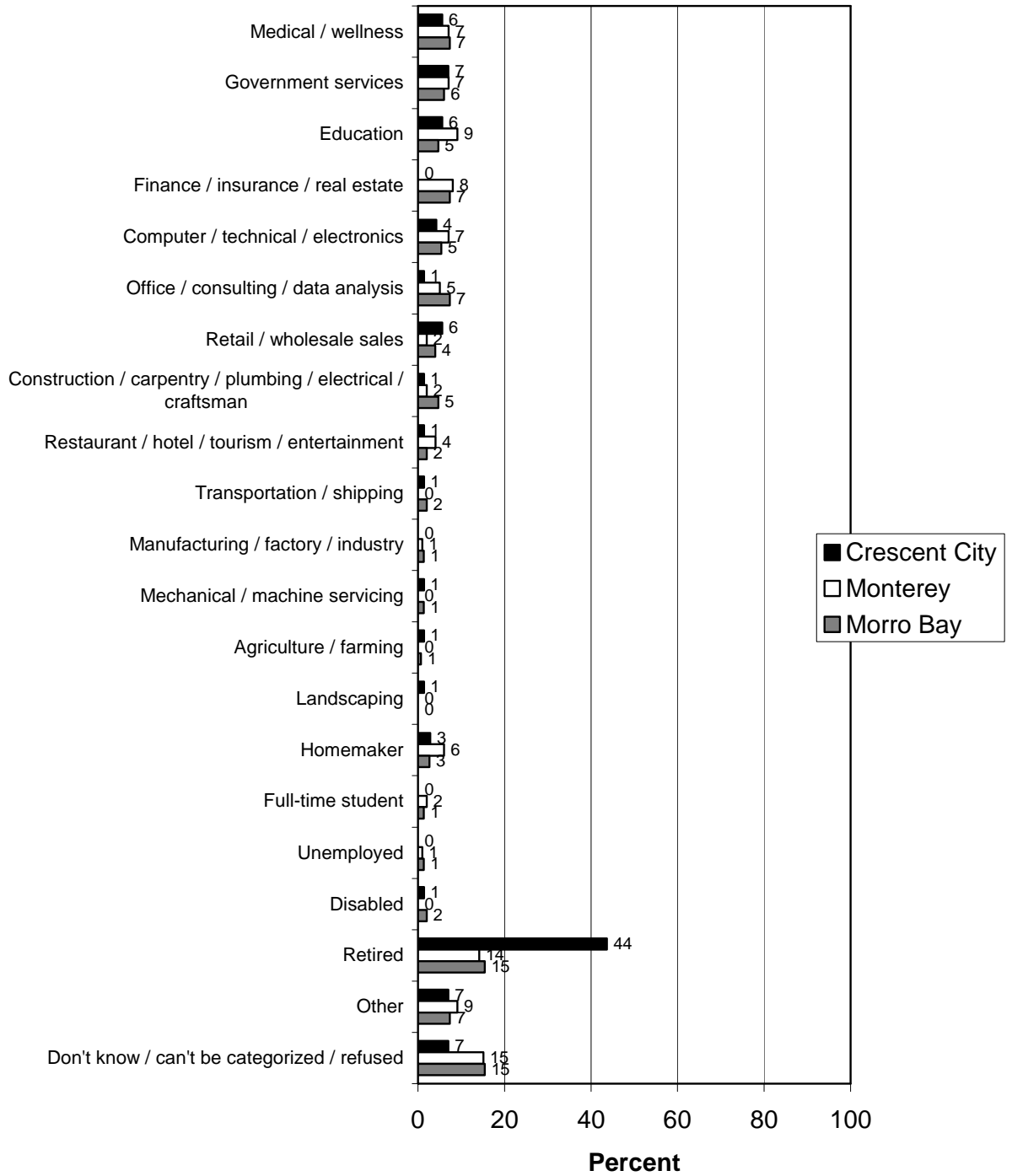
Q105. What races or ethnic backgrounds do you consider yourself? (Please mention all that apply.)



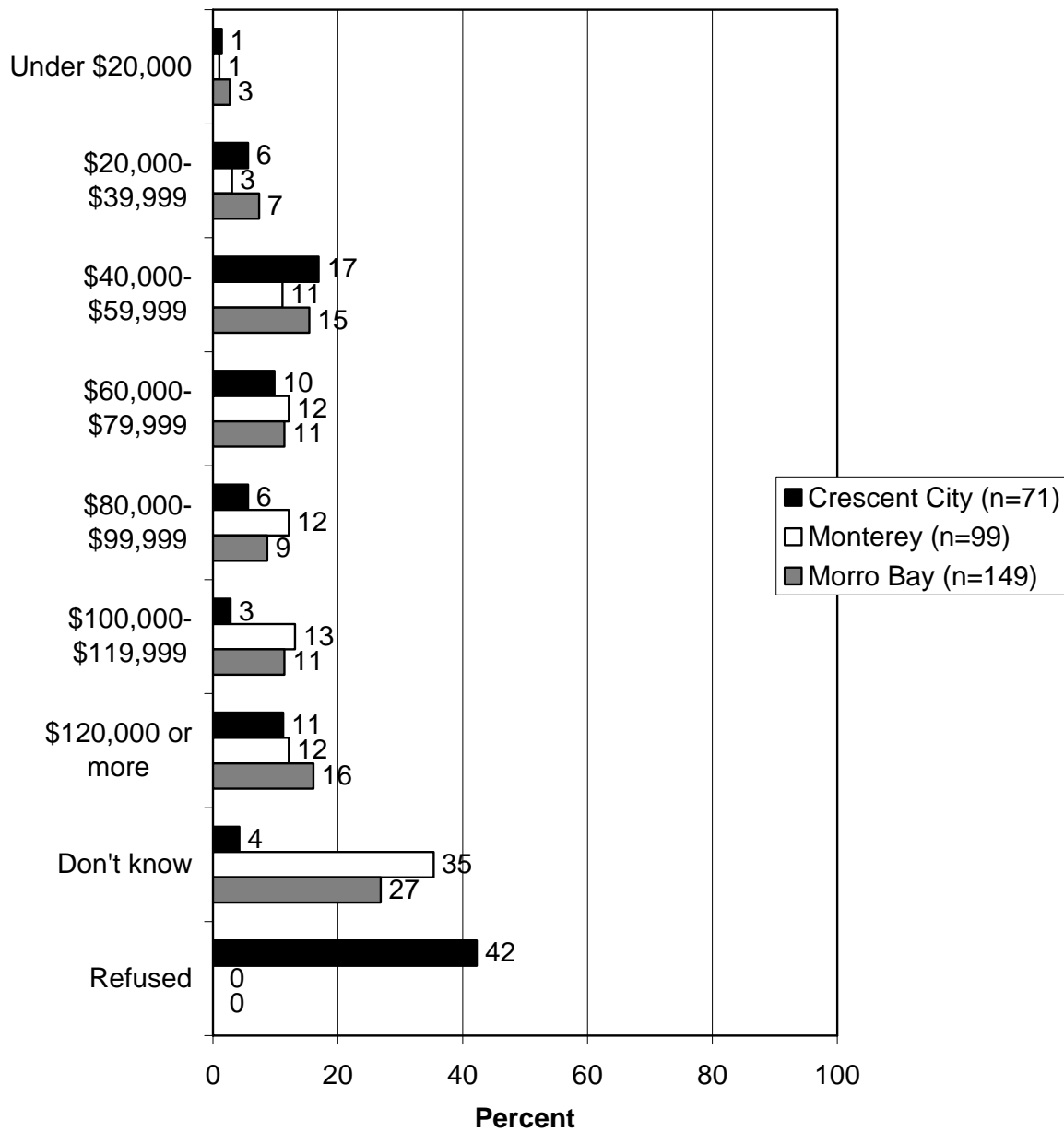
Q98. What is the highest level of education you have completed?



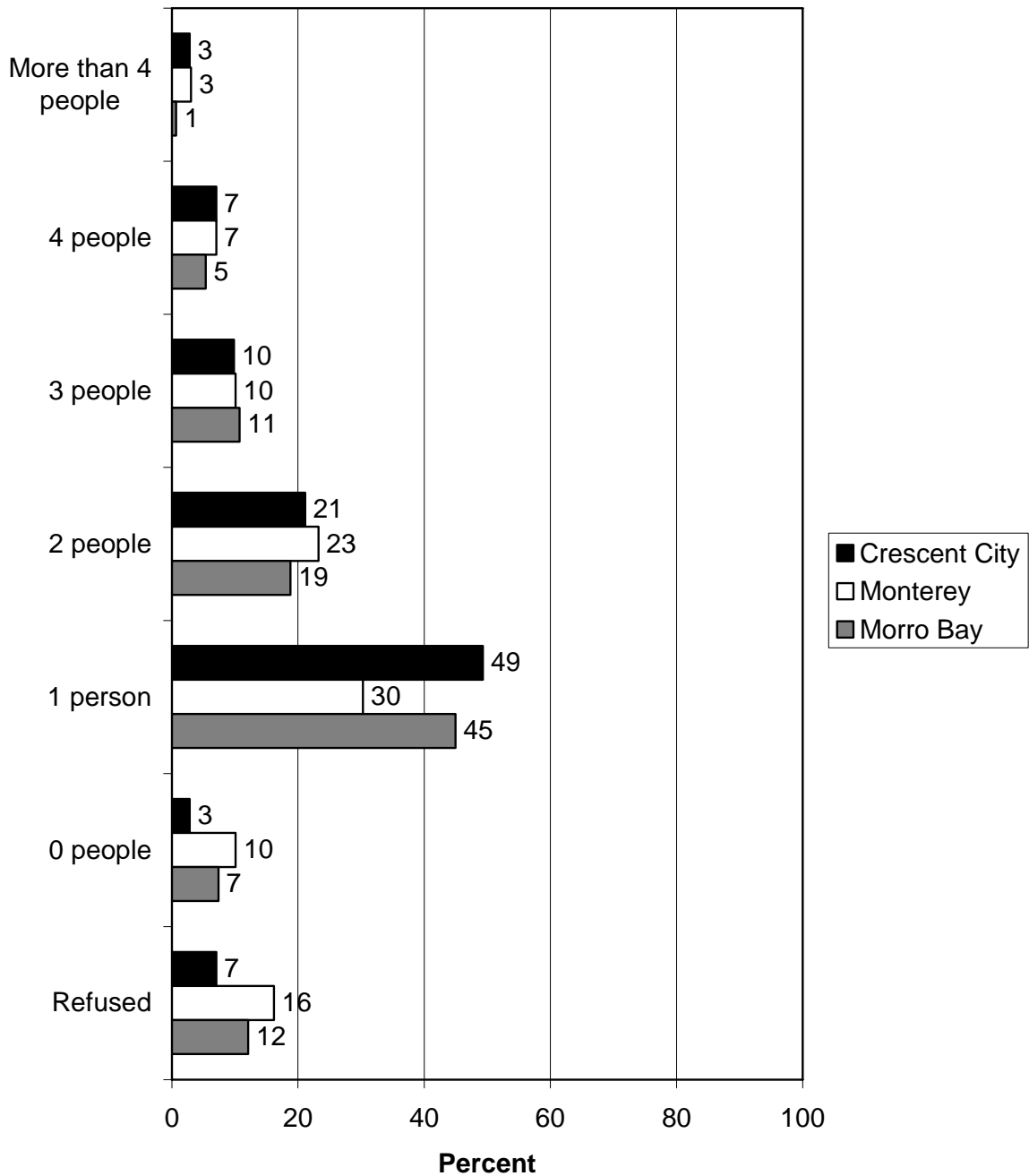
Q99/100. Respondent's occupation.



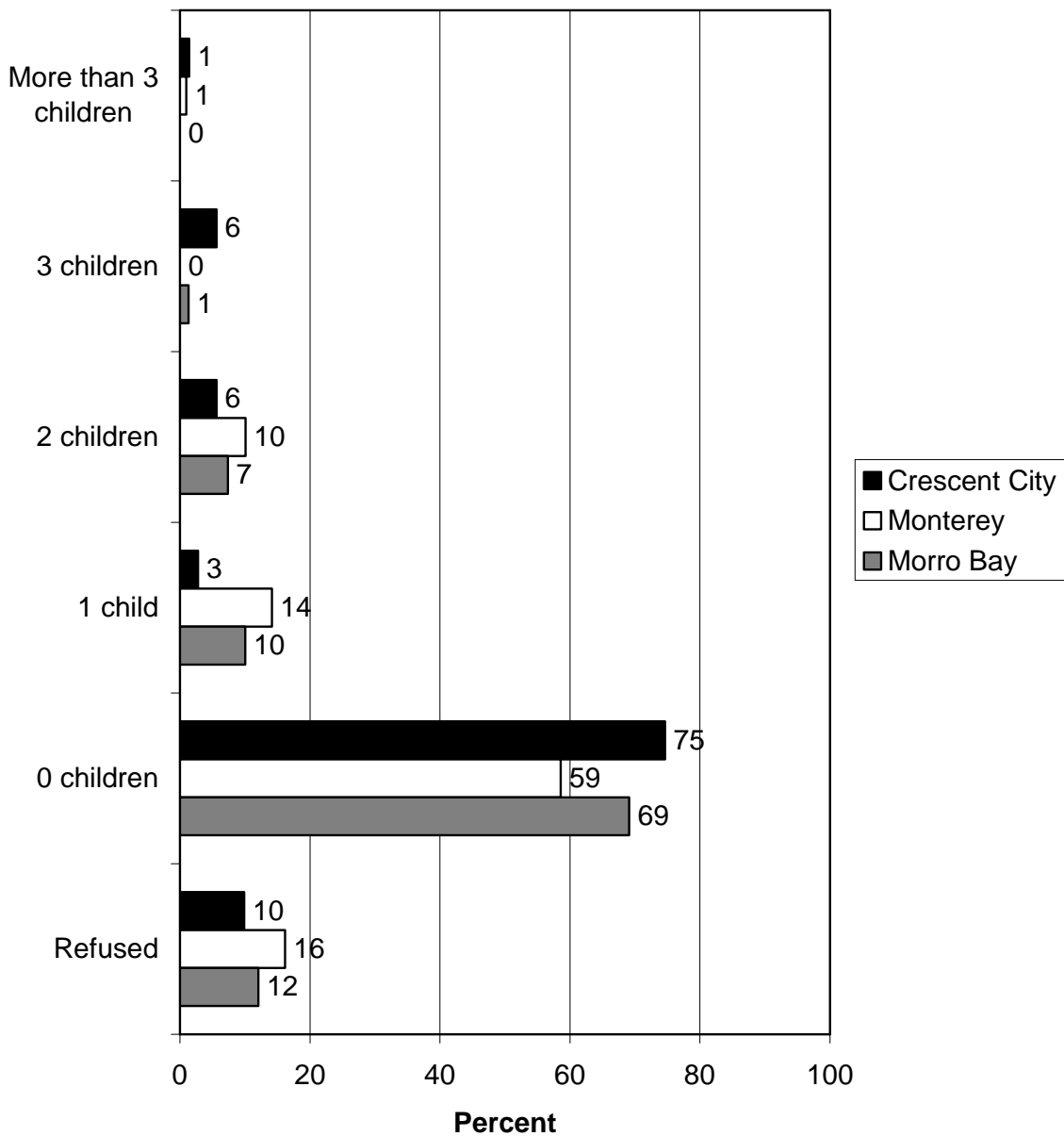
Q102. Which of these categories best describes your total household income before taxes last year?



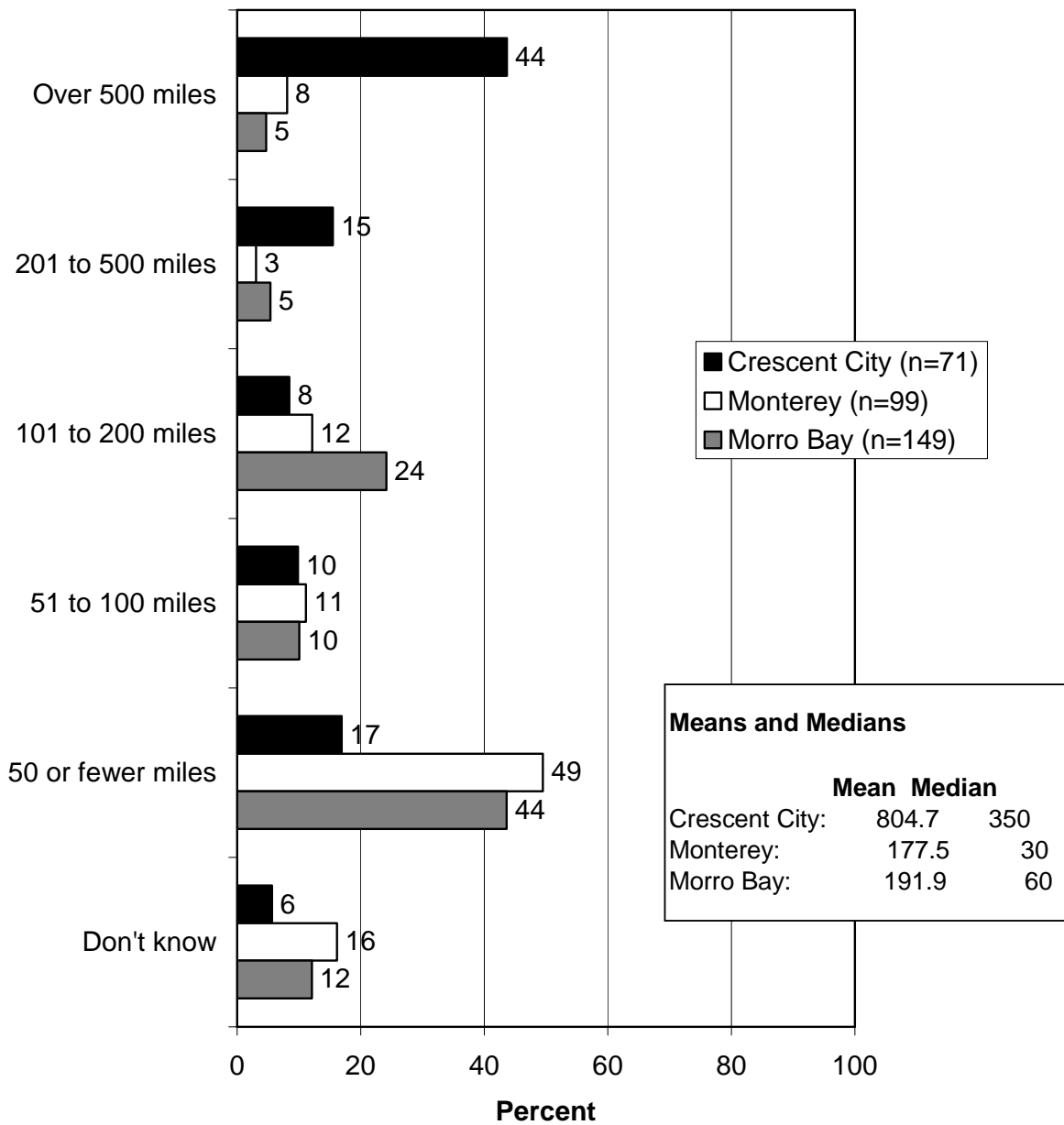
Q92. How many other people live in your household? Please don't count yourself.



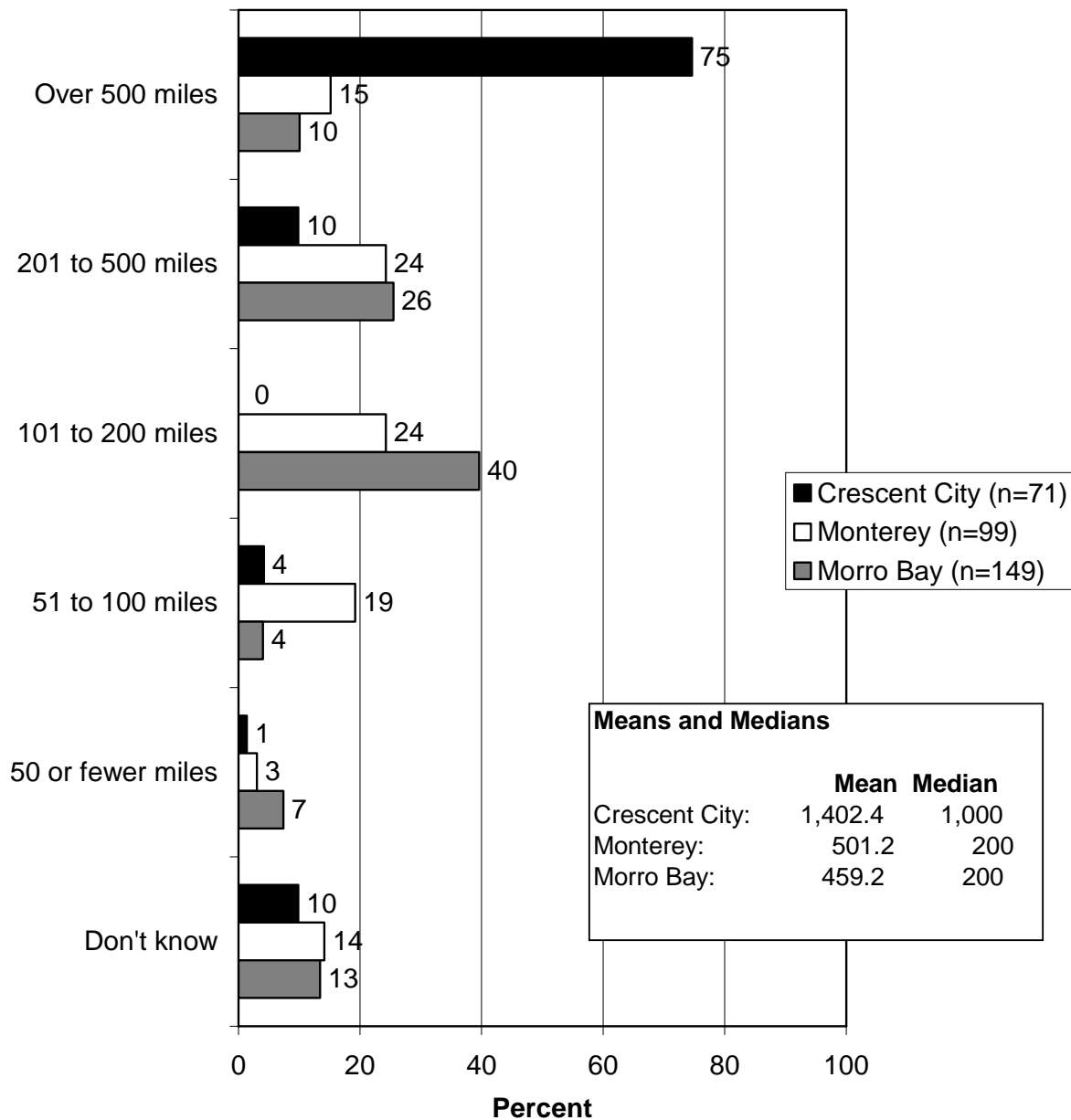
Q94. How many children 17 years old or younger live in your household?



Q88. How far away from the coast do you live?



Q90. How far away from Monterey / Morro Bay / Crescent City do you live?



ABOUT RESPONSIVE MANAGEMENT

Responsive Management is an internationally recognized public opinion and attitude survey research firm specializing in natural resource and outdoor recreation issues. Its mission is to help natural resource and outdoor recreation agencies and organizations better understand and work with their constituents, customers, and the public.

Utilizing its in-house, full-service, computer-assisted telephone and mail survey center with 50 professional interviewers, Responsive Management has conducted more than 1,000 telephone surveys, mail surveys, personal interviews, and focus groups, as well as numerous marketing and communications plans, need assessments, and program evaluations on natural resource and outdoor recreation issues.

Clients include most of the federal and state natural resource, outdoor recreation, and environmental agencies, and most of the top conservation organizations. Responsive Management also collects attitude and opinion data for many of the nation's top universities, including the University of Southern California, Virginia Tech, Colorado State University, Auburn, Texas Tech, the University of California—Davis, Michigan State University, the University of Florida, North Carolina State University, Penn State, West Virginia University, and others.

Among the wide range of work Responsive Management has completed during the past 20 years are studies on how the general population values natural resources and outdoor recreation, and their opinions on and attitudes toward an array of natural resource-related issues. Responsive Management has conducted dozens of studies of selected groups of outdoor recreationists, including anglers, boaters, hunters, wildlife watchers, birdwatchers, park visitors, historic site visitors, hikers, and campers, as well as selected groups within the general population, such as landowners, farmers, urban and rural residents, women, senior citizens, children, Hispanics, Asians, and African-Americans. Responsive Management has conducted studies on environmental education, endangered species, waterfowl, wetlands, water quality, and the reintroduction of numerous species such as wolves, grizzly bears, the California condor, and the Florida panther.

Responsive Management has conducted research on numerous natural resource ballot initiatives and referenda and helped agencies and organizations find alternative funding and increase their memberships and donations. Responsive Management has conducted major agency and organizational program needs assessments and helped develop more effective programs based upon a solid foundation of fact. Responsive Management has developed Web sites for natural resource organizations, conducted training workshops on the human dimensions of natural resources, and presented numerous studies each year in presentations and as keynote speakers at major natural resource, outdoor recreation, conservation, and environmental conferences and meetings.

Responsive Management has conducted research on public attitudes toward natural resources and outdoor recreation in almost every state in the United States, as well as in Canada, Australia, the United Kingdom, France, Germany, and Japan. Responsive Management routinely conducts surveys in Spanish and has also conducted surveys and focus groups in Chinese, Korean, Japanese, and Vietnamese.

Responsive Management's research has been featured in most of the nation's major media, including CNN, ESPN, *The Washington Times*, *The New York Times*, *Newsweek*, *The Wall Street Journal*, and on the front pages of *The Washington Post* and *USA Today*.

Visit the Responsive Management Website at:

www.responsivemanagement.com