

Responsive Management



CALIFORNIA TOURISM AND FISHING HERITAGE ASSESSMENT

**PART I: SURVEY OF BUSINESSES, COMMUNITY LEADERS,
AND TOURISM PROFESSIONALS**

Conducted for Alliance of Communities for Sustainable Fisheries

by Responsive Management

2008

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AND TOURISM PROFESSIONALS**

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

EXECUTIVE SUMMARY

INTRODUCTION AND METHODOLOGY

This report discusses the results of Part I of a study conducted for the Alliance of Communities for Sustainable Fisheries (hereinafter referred to as ACSF) to determine the extent to which tourists, tourism professionals, and community leaders value recreational and commercial fishing opportunities in California's coastal communities. The assessment was designed to determine the importance of the communities' fishing heritage; the public's ability to access working waterfronts; and the public's opportunity to buy and consume fresh, local seafood and how these features affect the greater tourism economies.

Part I of this study entailed a multi-modal survey administered through both a telephone and online questionnaire to tourism professionals in each of the California coastal communities participating in the study: Crescent City, Monterey, and Morro Bay. (Part II of this study will entail a survey to be administered to potential tourists and visitors to each coastal community.) Tourism professionals include those 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. Telephone and online surveys with tourism professionals were conducted from November to December 2007, and Responsive Management completed 143 surveys.

IMPORTANCE OF FACTORS INFLUENCING COMMUNITY IDENTITY

HISTORY AND FISHING HERITAGE

- Tourism professionals were asked to rate the importance of three factors influencing their community's identity: local history, commercial fishing, and recreational fishing. All three factors were rated highly by each community 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 overall mean rating for local history's importance to community identity was 8.54, commercial fishing activities was 8.53, and recreational fishing activities was 8.44. This similarity in the rating of these factors highlights the relative importance of all of these factors on establishing community identity in California's coastal communities.

COMMUNITY UNIQUENESS

- In identifying the things that make their community unique, 74% of all tourism professionals cited some form of recreational opportunities or tourism attractions. The specific recreational opportunities and tourism attractions that were cited included fishing and fishing heritage (39%); oceans, bays, and beaches (32%); specific area landmarks and wildlife (26%); harbor and working waterfront (20%); and lodging and dining opportunities (6%).

IMPORTANCE OF FACTORS INFLUENCING COMMUNITY ECONOMY TOURISM AND FISHING HERITAGE

- Tourism professionals 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 included 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 was the most important, having the highest mean rating (9.53) and having the highest percentage of professionals 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) were the next most important factors. These were 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 was manufacturing.

IMPORTANCE OF JOBS CREATED BY FISHING ACTIVITIES

- Overall, 58% of tourism professionals indicated that the number of jobs *directly* created by fishing activities was of great importance to their community's economy (rated 8 or above on a scale of 0 to 10); 29% gave a moderate rating (from 3-7); and 3% indicated that the actual number of jobs *directly* created by fishing activities was of low importance to the community's economy (rated 0-2). Nearly identical results were reported for the importance of the number of jobs *indirectly* created by fishing activities

IMPORTANCE OF FISHING HERITAGE AND LOCAL SEAFOOD IN ATTRACTING BUSINESS

- Nearly two-thirds of all tourism professionals surveyed, 63%, indicated that the fishing heritage of their community was of great importance in attracting business to their community (rated 8 or above); 31% rated its importance as moderate (rated 3-7); and only 3% indicated that fishing heritage was of low importance in attracting business to their community (rated 0-2).
- The majority of all tourism professionals surveyed, 74%, indicated that having local, fresh seafood available was of great importance in attracting business to their community (rated 8 or above on a scale of 0 to 10); 25% rated its importance as moderate (rated 3-7); and only 2% indicated that having local, fresh seafood available was of low importance in attracting business to their community (rated 0-2).

ACCESSIBILITY OF LOCAL TOURISM AND BUSINESS INFORMATION

- Tourism professionals appear to be well informed of various media promoting their local community. Almost all, 94%, tourism professionals are aware of brochures or websites that promote tourism and business in the Monterey Peninsula, Morro Bay area, or Crescent City area. Only 4% indicated that they are unaware of brochures or websites promoting tourism in their community.
- Marketing and advertising directed toward tourists and potential business appears to feature the community's fishing heritage. When asked if the brochures or websites feature photographs of fishing activities or fishing boats, 74% of all respondents indicated that they do; only 9% reported that the brochures or websites do not feature photographs of fishing activities or fishing boats.
- The local Chamber of Commerce was most often identified as a source of information for California's coastal communities. Over half, 66%, of tourism professionals listed the Chamber of Commerce as the source sponsoring brochures and websites promoting tourism and business in the community. All other sources were 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 GOVERNMENT

- Overall, 80% of tourism professionals believe that their community government appreciates its cultural resources. Only 12% do not believe that their community government appreciates its cultural resources.
- Likewise, 74% of tourism professionals believe that their community government works to preserve its cultural identity; 20% do not believe that their community government works to preserve cultural identity.

ORGANIZATIONAL INFORMATION

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

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INTRODUCTION AND METHODOLOGY

This report discusses the results of Part I of a study conducted for the Alliance of Communities for Sustainable Fisheries (hereinafter referred to as ACSF) to determine the extent to which tourists, tourism professionals, and community leaders value recreational and commercial fishing opportunities in California's coastal communities. The assessment was designed to determine the importance of the communities' fishing heritage; the public's ability to access working waterfronts; and the public's opportunity to buy and consume fresh, local seafood and how these features affect the greater tourism economies. 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. Part I of the study entailed a multi-modal survey administered through both a telephone and online questionnaire.

For Part I of this assessment, a survey questionnaire was administered to community tourism professionals in three California waterfront communities: Crescent City, Monterey, and Morro Bay. For the purposes of the study, tourism professionals 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 (hereinafter referred to as tourism professionals). The purpose of this survey was to determine tourism professionals' opinions on the value of commercial and recreational fishing opportunities for their community's identity and economy and to assess the degree to which tourism professionals will experience a sense of loss or, potentially, actual business income loss should these fishing-related activities go away or be lost to other competing communities.

The sample of tourism professionals was obtained through the harbormaster in each coastal community, as well as through additional online research of the local area that was conducted by Responsive Management's research team. Those respondents for whom email addresses were available received an email to inform them of the upcoming study and encourage participation.

Telephone and online surveys with tourism professionals were conducted from November to December 2007.

TELEPHONE SURVEY FACILITIES AND PROCEDURES

Telephone interviews with professionals 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. 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. Interviewers were asked not to leave messages on answering machines but to continue to call during different times of the day; they were authorized to leave messages *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.

The target population was very receptive to the interviewers, having been previously notified about the survey via email. The email sent prior to survey implementation offered respondents the chance to schedule interviews from Monday-Friday from 9:00 a.m. to 1:00 p.m. PST. These times were also offered for scheduling an interview when a respondent was reached by telephone but unable to complete the survey; at that time as another alternative to a scheduled interview, the respondents were given our toll-free number to call at their convenience. Each day, interviewers were provided a list of scheduled callbacks from email requests or previous telephone calls.

Responsive Management used Questionnaire Programming Language 4.1 (QPL) for data collection. 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 this survey. 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.

ONLINE SURVEY PROCEDURES

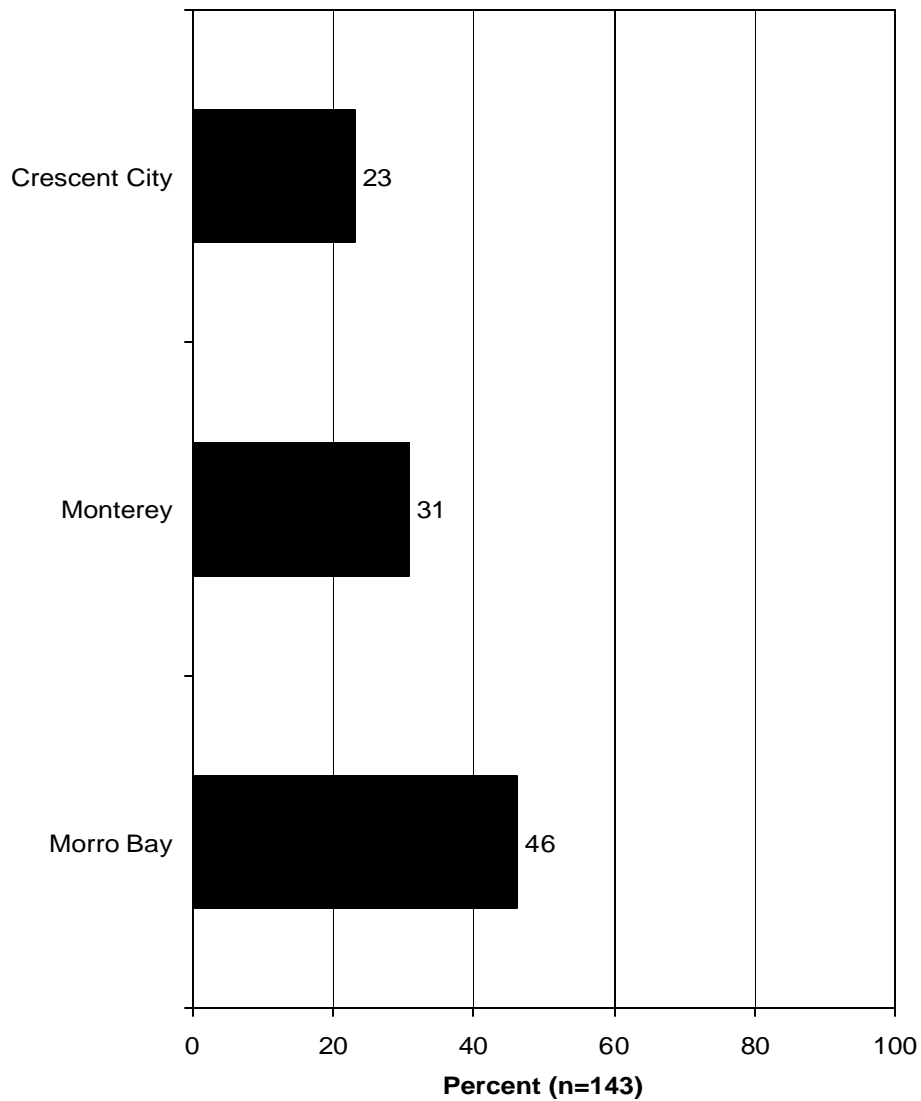
A web-based survey was developed and distributed to a list of 160 business professionals in the Morro Bay area; in this case, telephone numbers were not available and email distribution served as the primary contact method. The online survey was similar in design and asked the same questions as the telephone survey; however, formatting changes were made to the survey instrument only to accommodate online viewing of the questionnaire. 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

Responsive Management obtained 33 completed interviews in the Crescent City area; 44 completed interviews in the Monterey Peninsula; and 66 completed interviews in the Morro Bay area. The analysis of data was performed using Statistical Package for the Social Sciences (SPSS) software as well as proprietary software developed by Responsive Management and included an examination of the results among the sample as a whole as well as a breakdown of all results by city. Sampling errors could not be determined because the total potential sample population could not be determined.

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).

Survey Respondent Distribution by Community

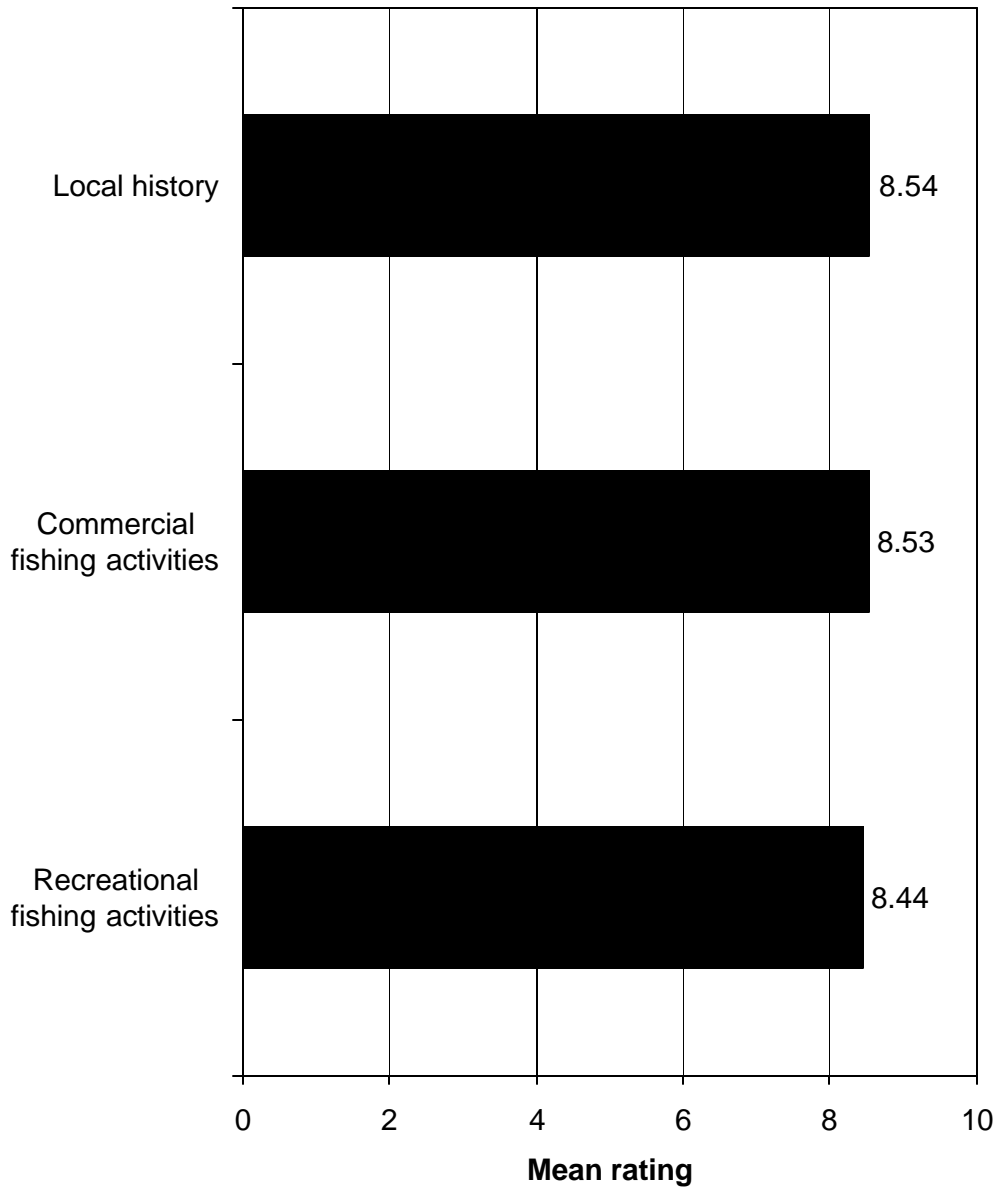


IMPORTANCE OF FACTORS INFLUENCING COMMUNITY IDENTITY

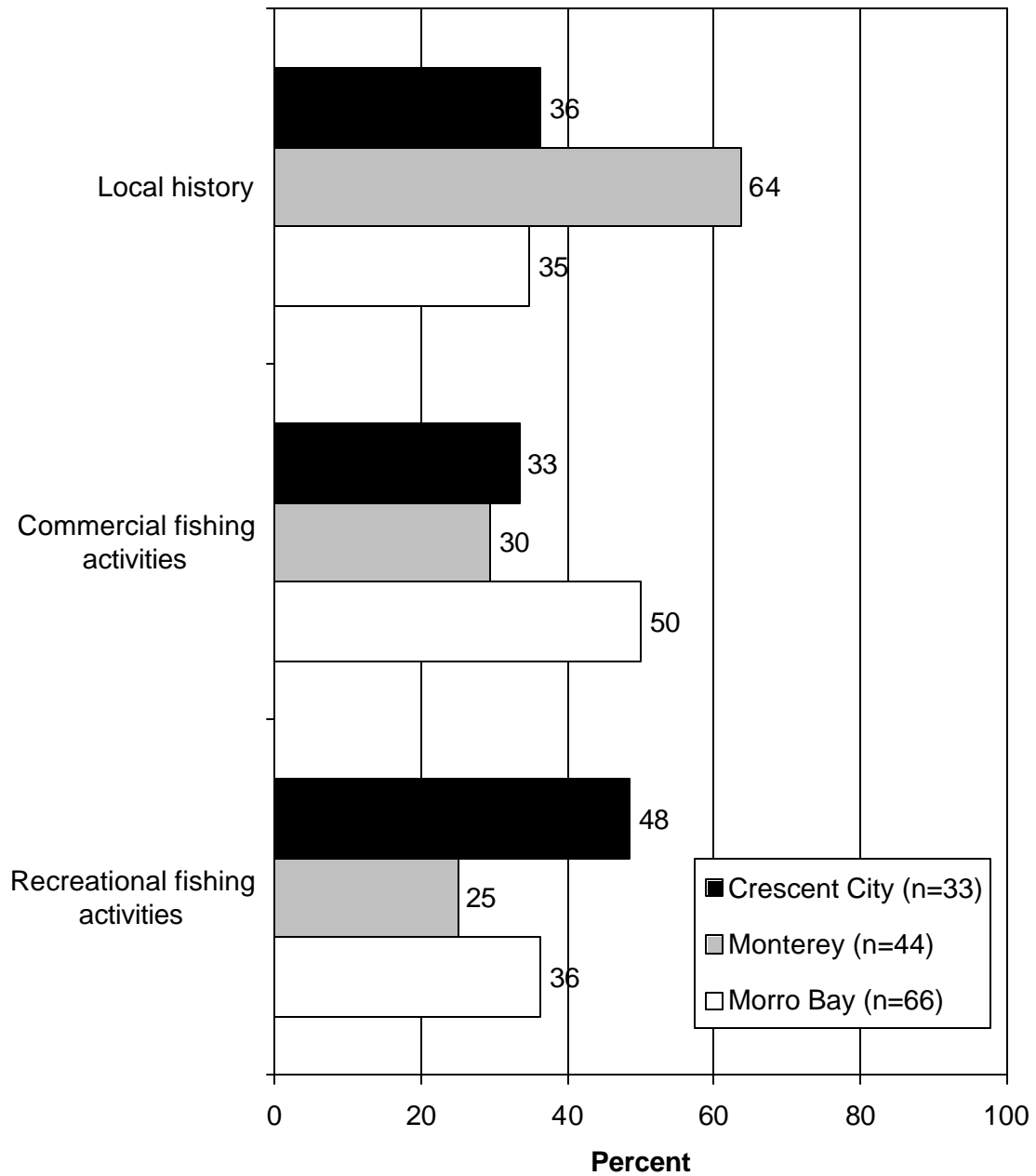
HISTORY AND FISHING HERITAGE

- Tourism professionals were asked to rate the importance of three factors influencing their community's identity: local history, commercial fishing, and recreational fishing. All three factors were rated highly by each community 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 overall mean rating for local history's importance to community identity was 8.54, commercial fishing activities was 8.53, and recreational fishing activities was 8.44. This similarity in the rating of these factors highlights the relative importance of all of these factors on establishing community identity in California's coastal communities.
- Crescent City gave notably higher ratings to recreational fishing activities, relative to other communities: 48% of tourism professionals in Crescent City rated recreational fishing activities as extremely important to community identity, compared to 36% in Morro Bay and 25% in Monterey.
 - Monterey gave notably higher ratings to local history, relative to the other communities; in fact, 64% of the population rated local history as extremely important to the identity of the Monterey community. This was nearly double the percentage of professionals who rated local history as extremely important in Crescent City (36%) and Morro Bay (35%).
 - Morro Bay gave notably higher ratings to commercial fishing activities, relative to the other communities: 50% of professionals surveyed in Morro Bay rated commercial fishing activities as extremely important to the identity of their community compared to 33% in Crescent City and 30% in Monterey.

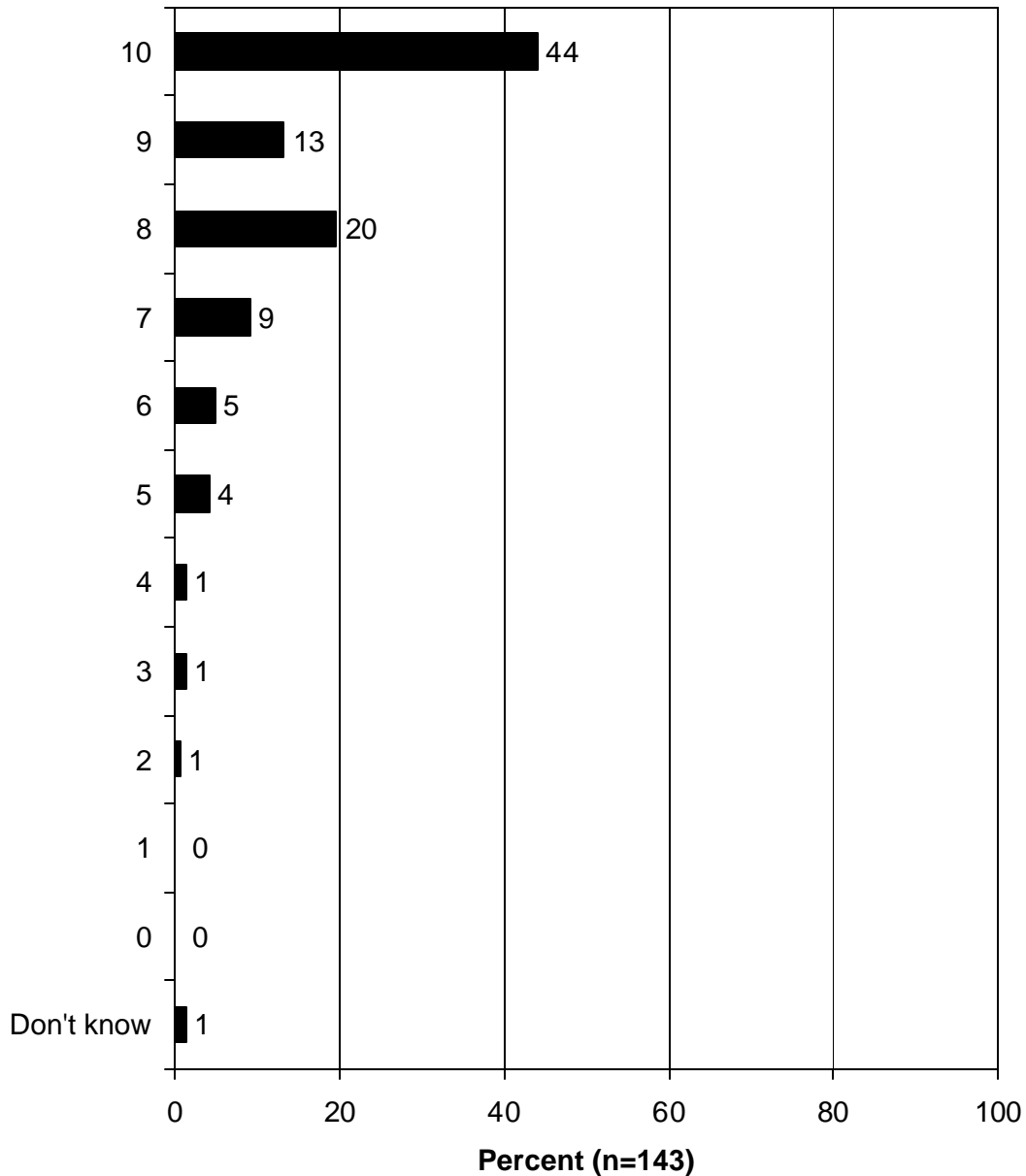
Q8, 10-11. On a scale of 0 - 10, where 0 is "not at all important" and 10 is "extremely important," the mean rating of importance for the following factors on the coastal community's identity.



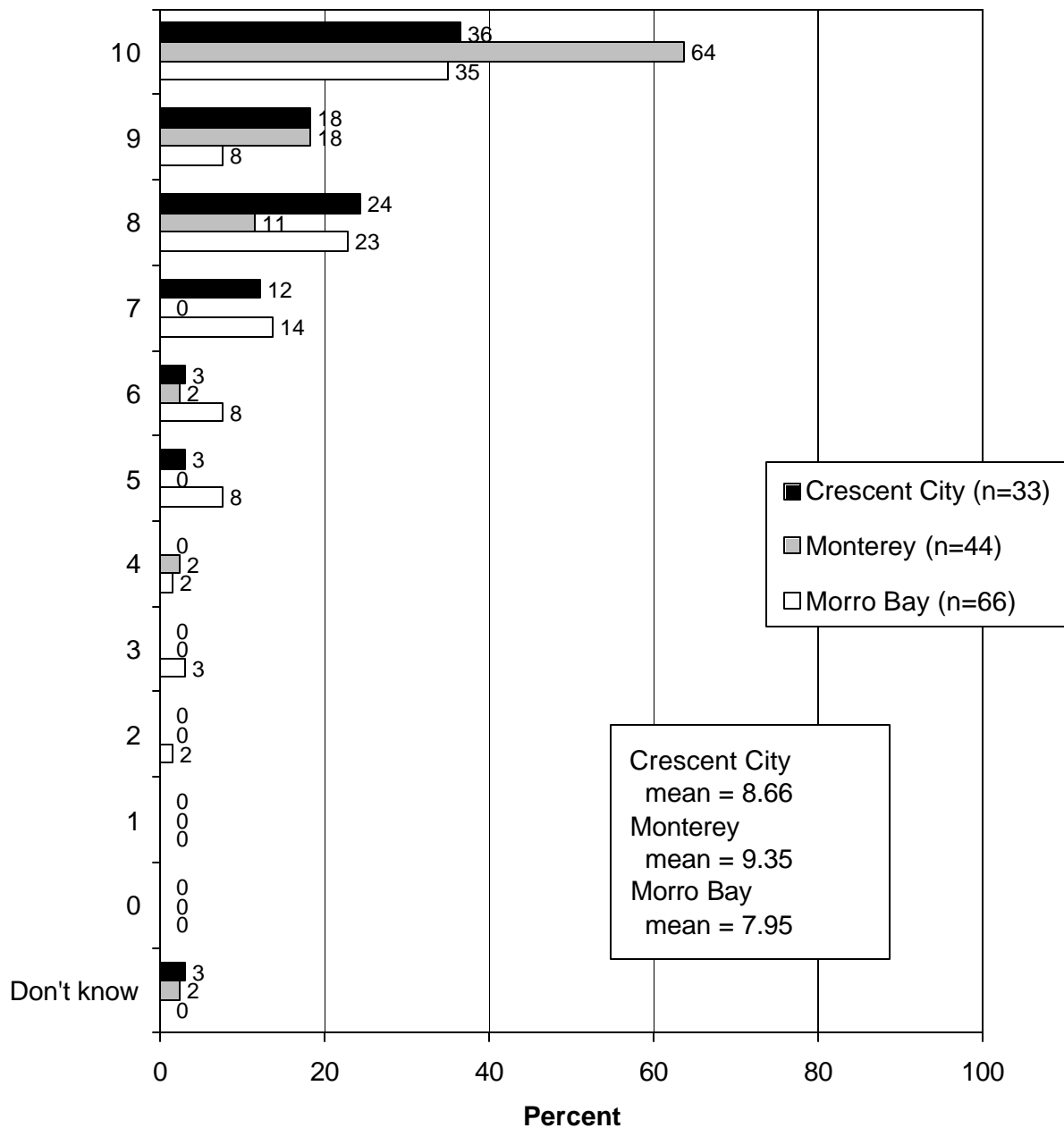
Q8, 10-11. Percentage giving a rating of 10 for the importance of the following on the identity of their community (using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important). (Ranked by the total.)



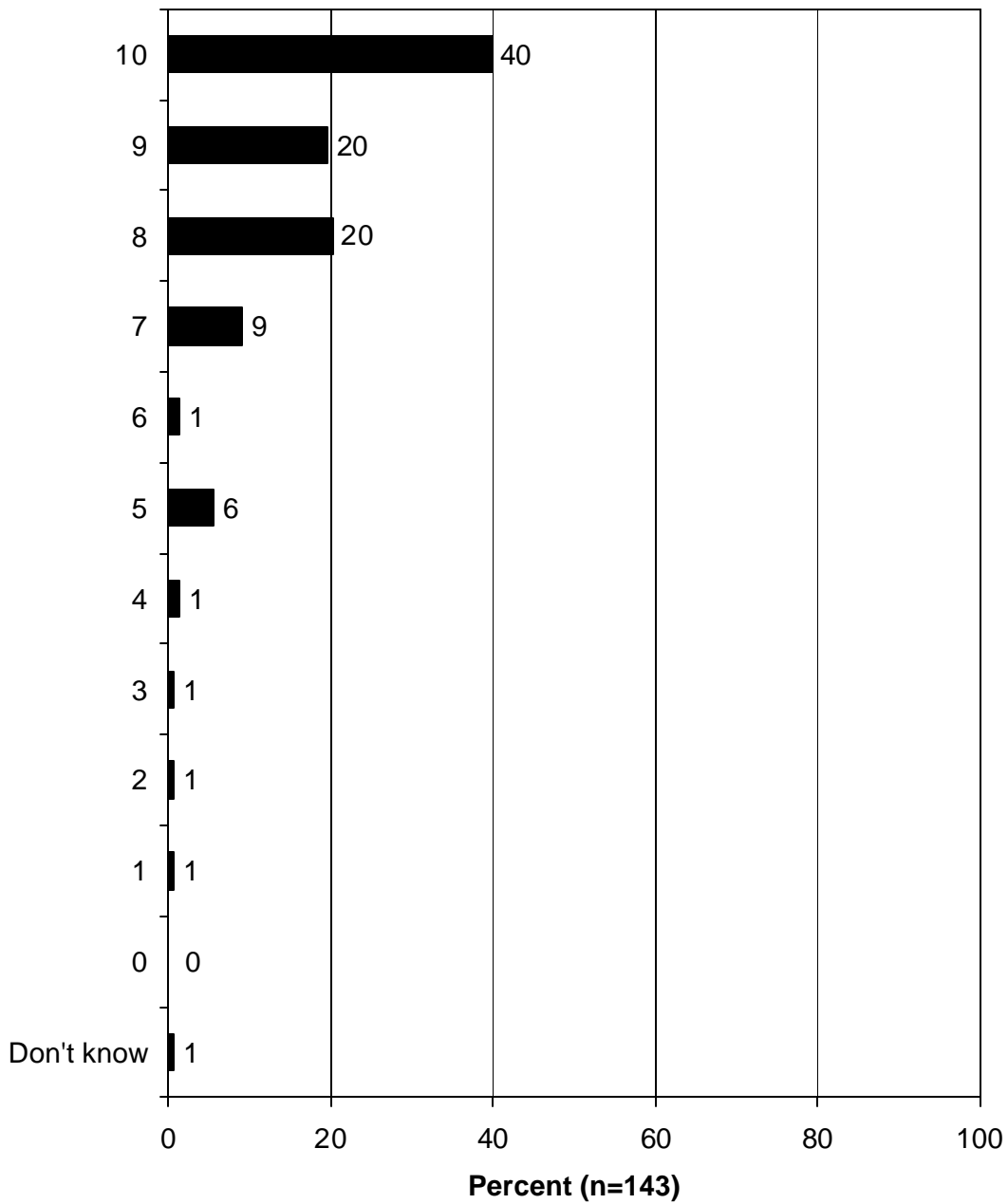
Q8. What about local history?
(Please rate the importance of local history on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



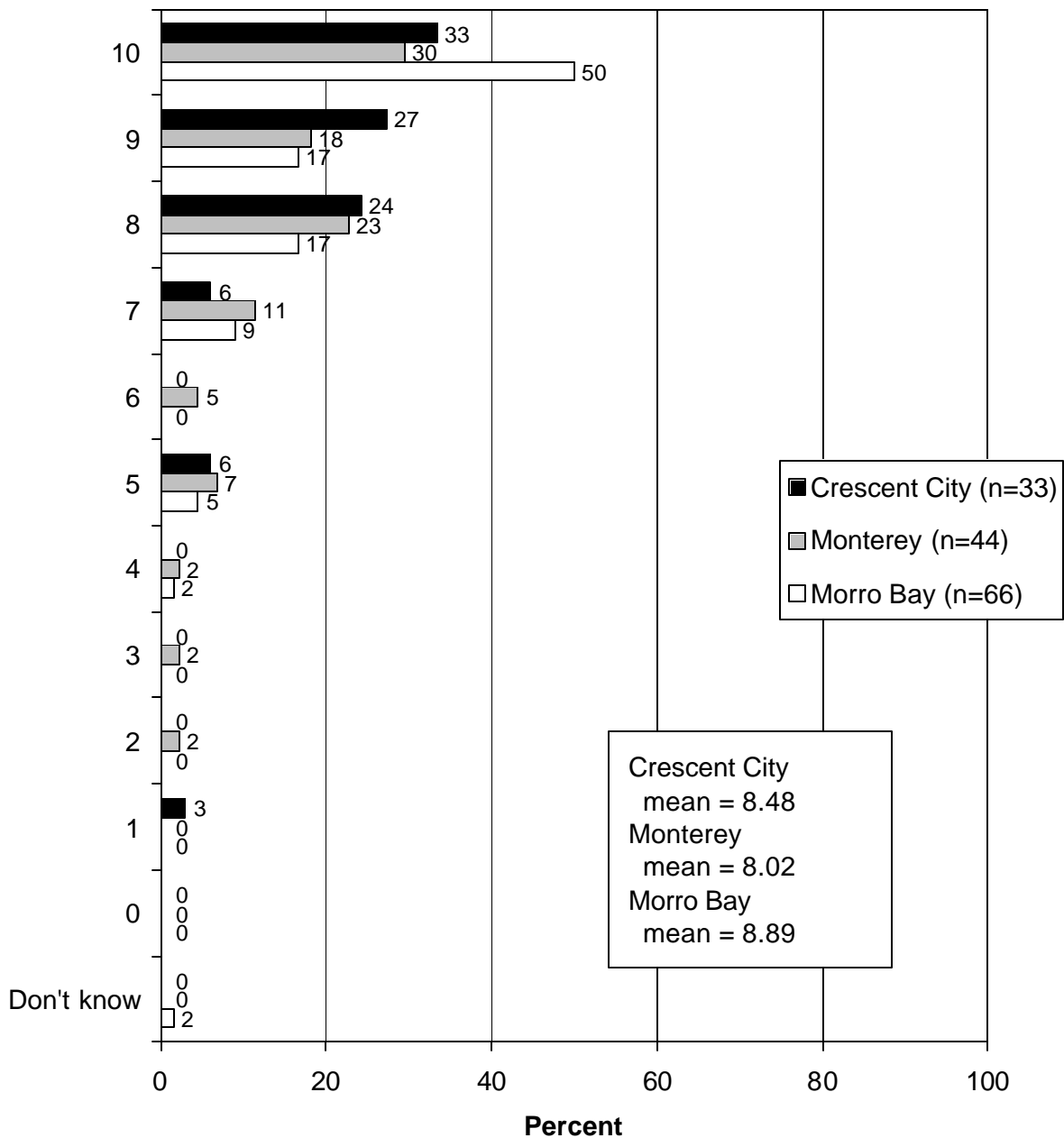
Q8. What about local history?
 (Please rate the importance of local history on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



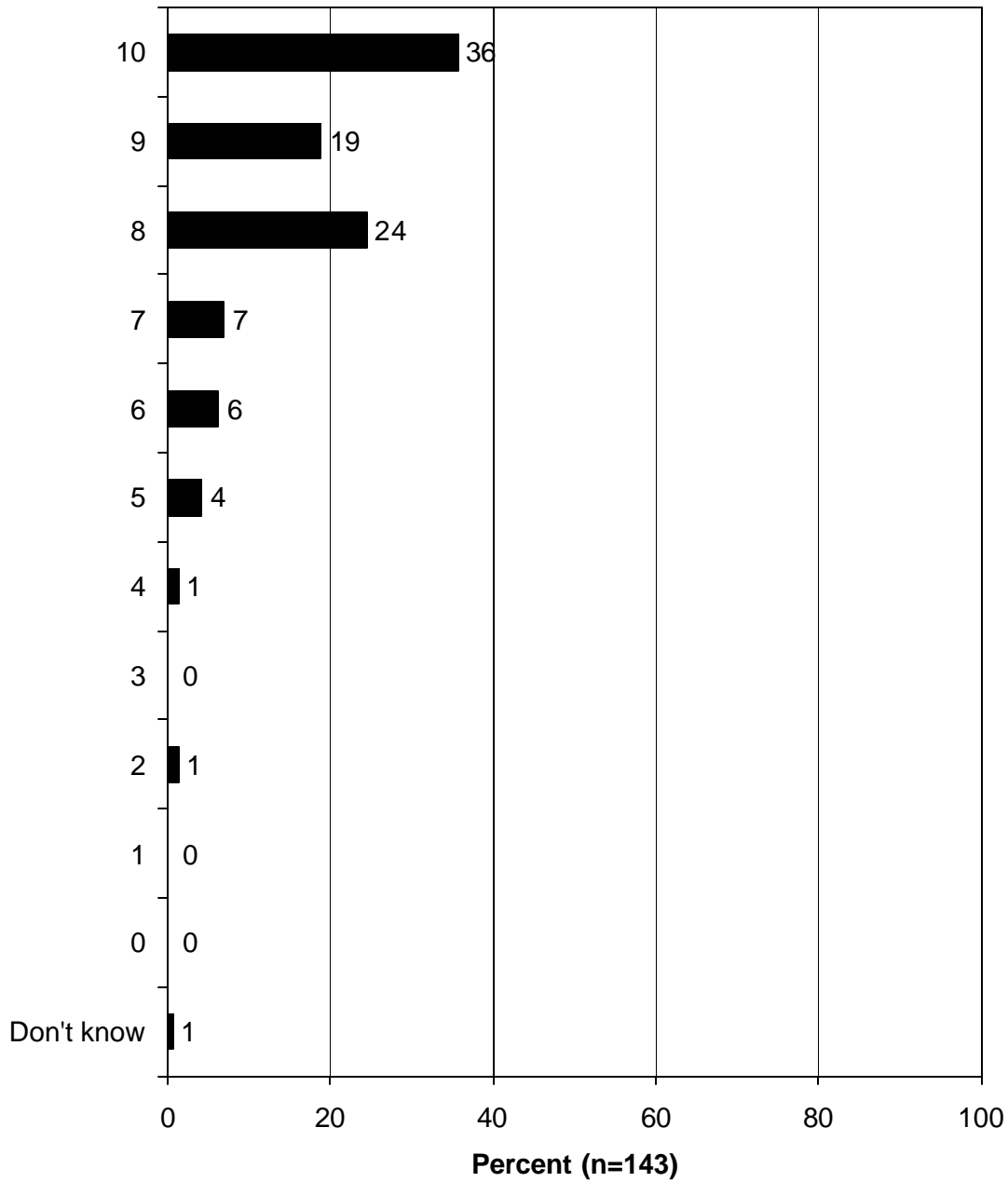
Q10. What about commercial fishing activities?
(Please rate the importance of commercial fishing activities on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



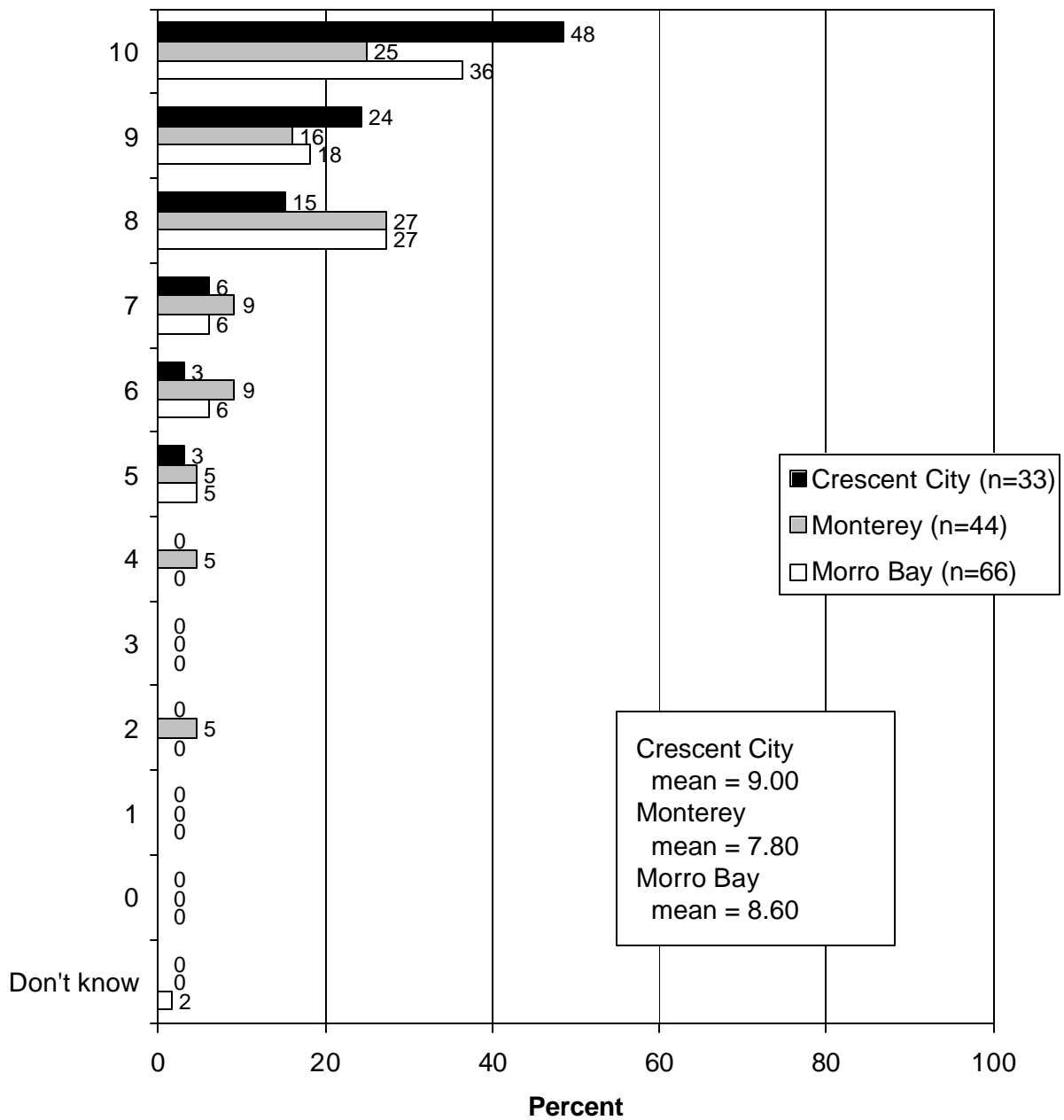
**Q10. What about commercial fishing activities?
 (Please rate the importance of commercial fishing activities on the identity of your community using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)**



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.)**



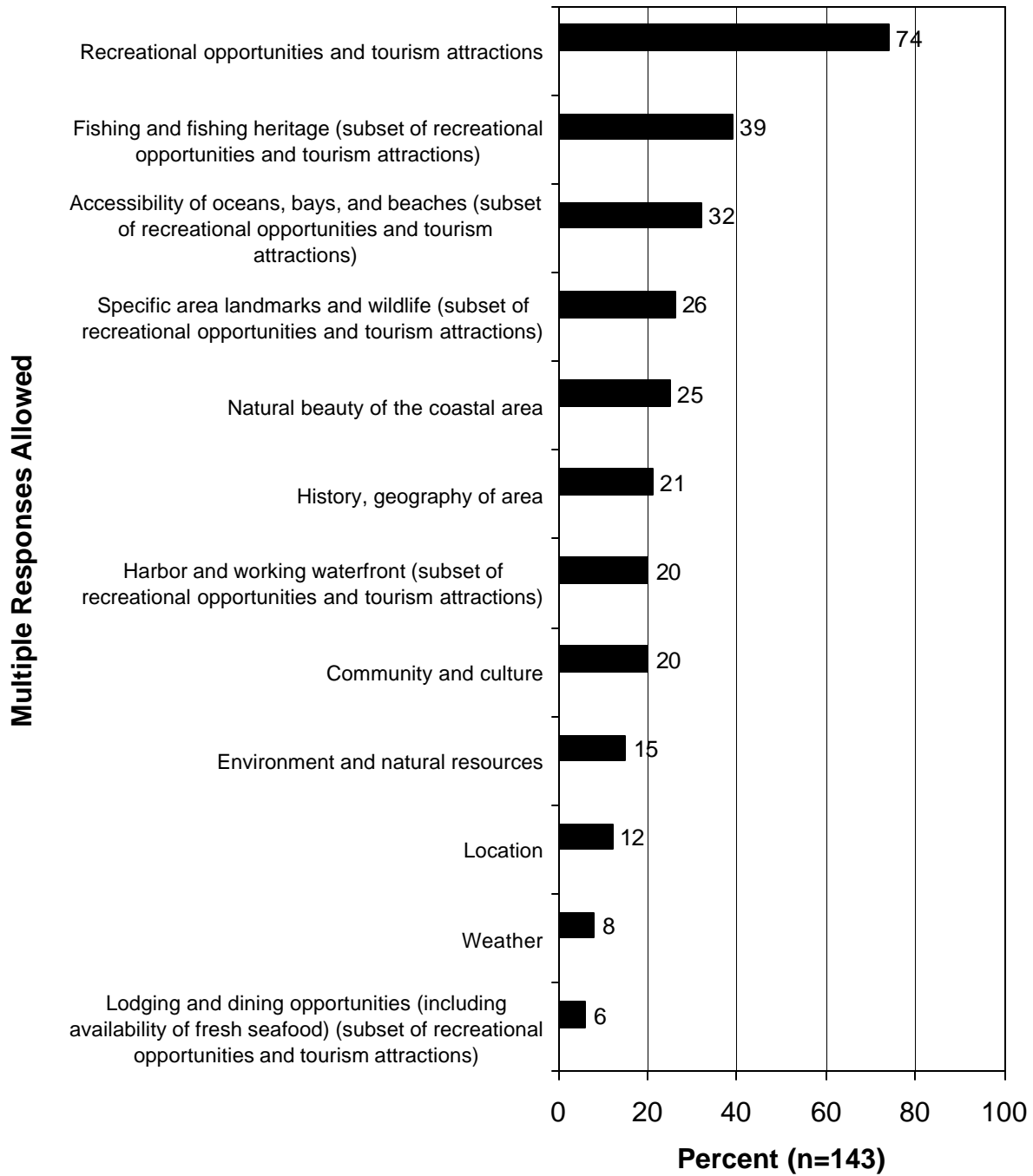
COMMUNITY UNIQUENESS

- In identifying the things that make their community unique, 74% of all tourism professionals cited some form of recreational opportunities or tourism attractions. The specific recreational opportunities and tourism attractions that were cited included fishing and fishing heritage (39%); oceans, bays, and beaches (32%); specific area landmarks and wildlife (26%); harbor and working waterfront (20%); and lodging and dining opportunities (6%).

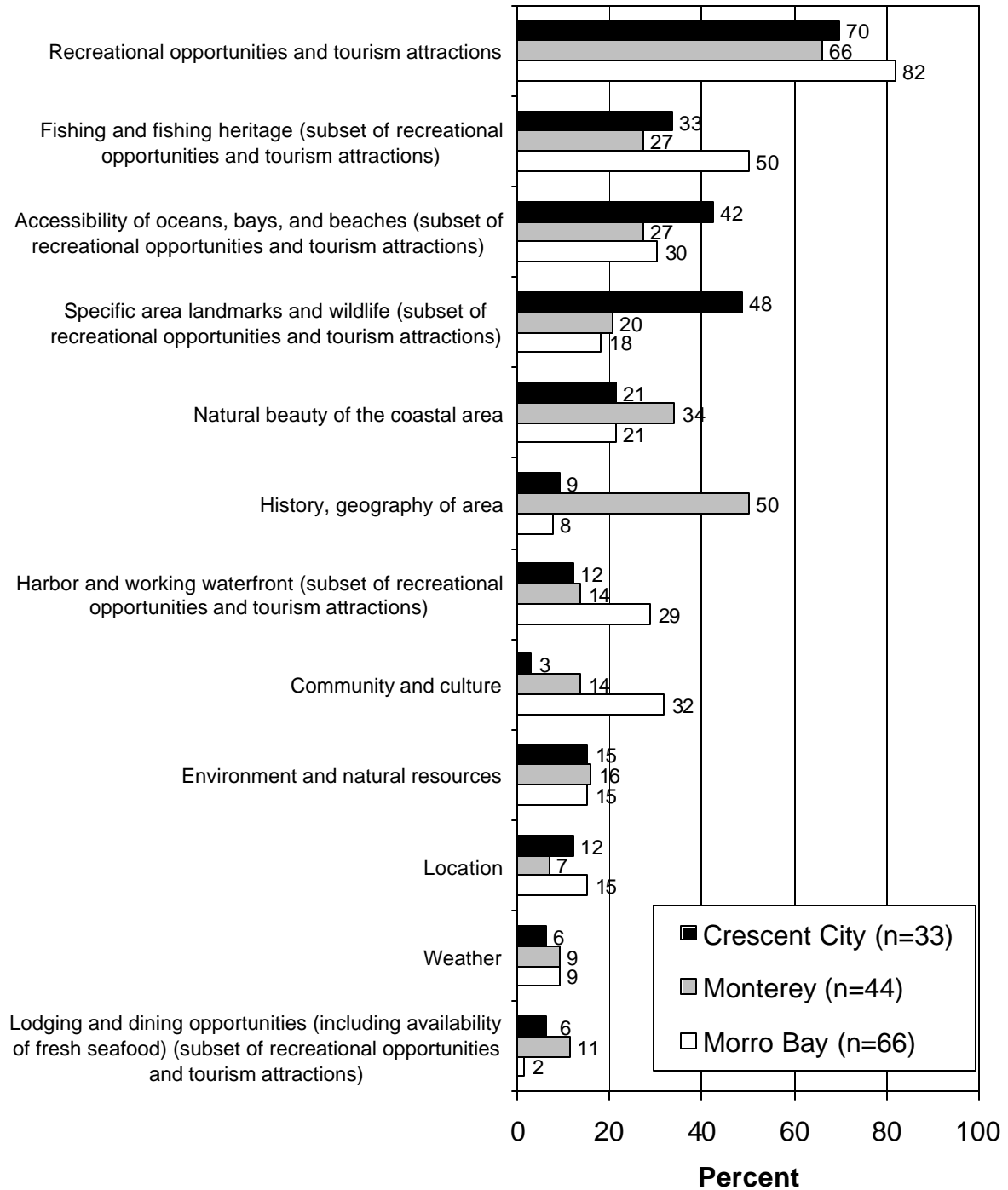
- In addition to recreational opportunities and tourism attractions, professionals also highlighted a number of other features attracting tourists to their respective communities: 25% of all tourism professionals listed the natural beauty of the coastal area; 21% cited the history and/or geography of the area; and 20% identified community and culture as qualities that make their community unique to tourists. Additional factors included the environment and natural resources, location, and weather.

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

Q25. What makes your community unique to tourists?



Q25. What makes your community unique to tourists?

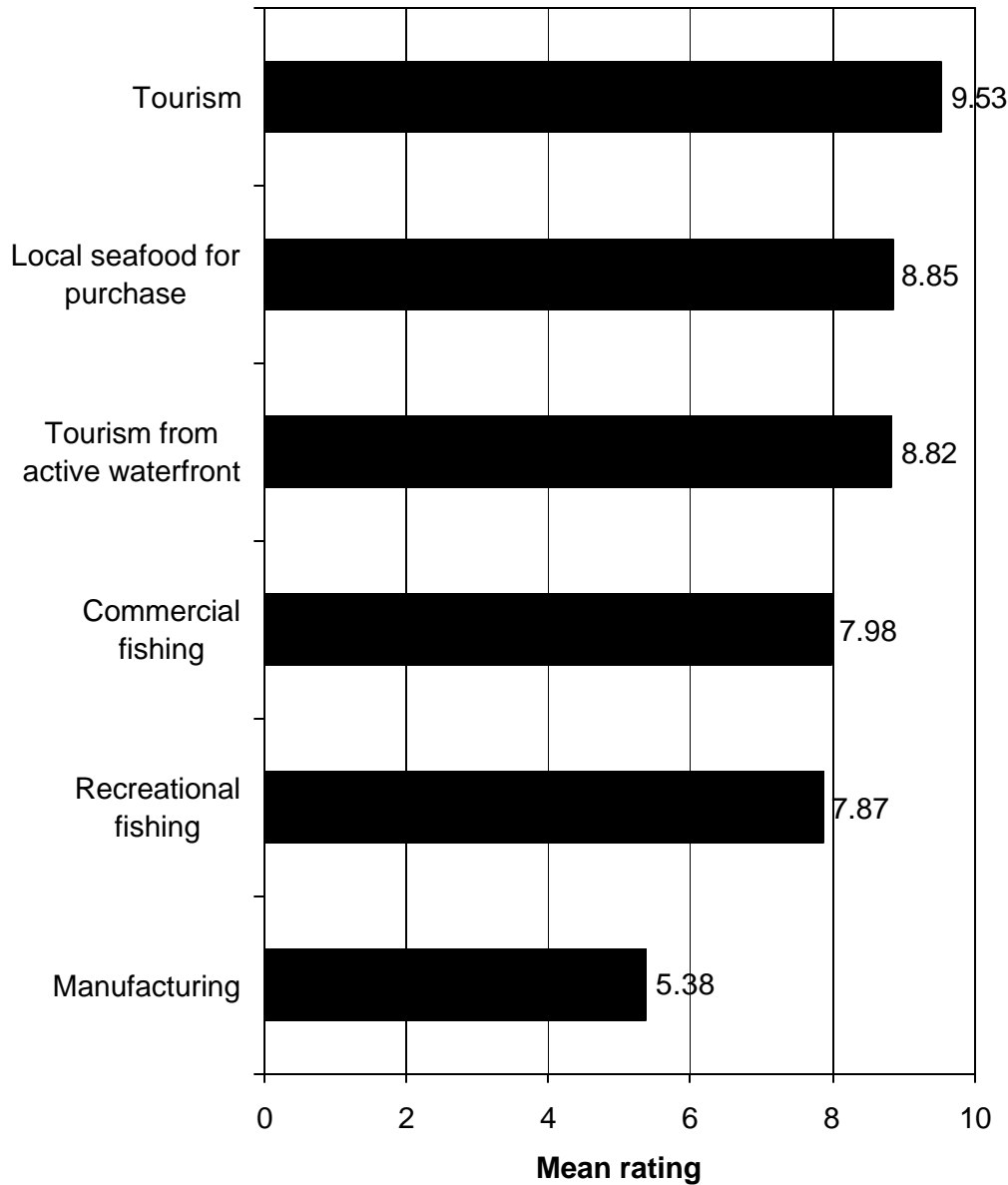


IMPORTANCE OF FACTORS INFLUENCING COMMUNITY ECONOMY

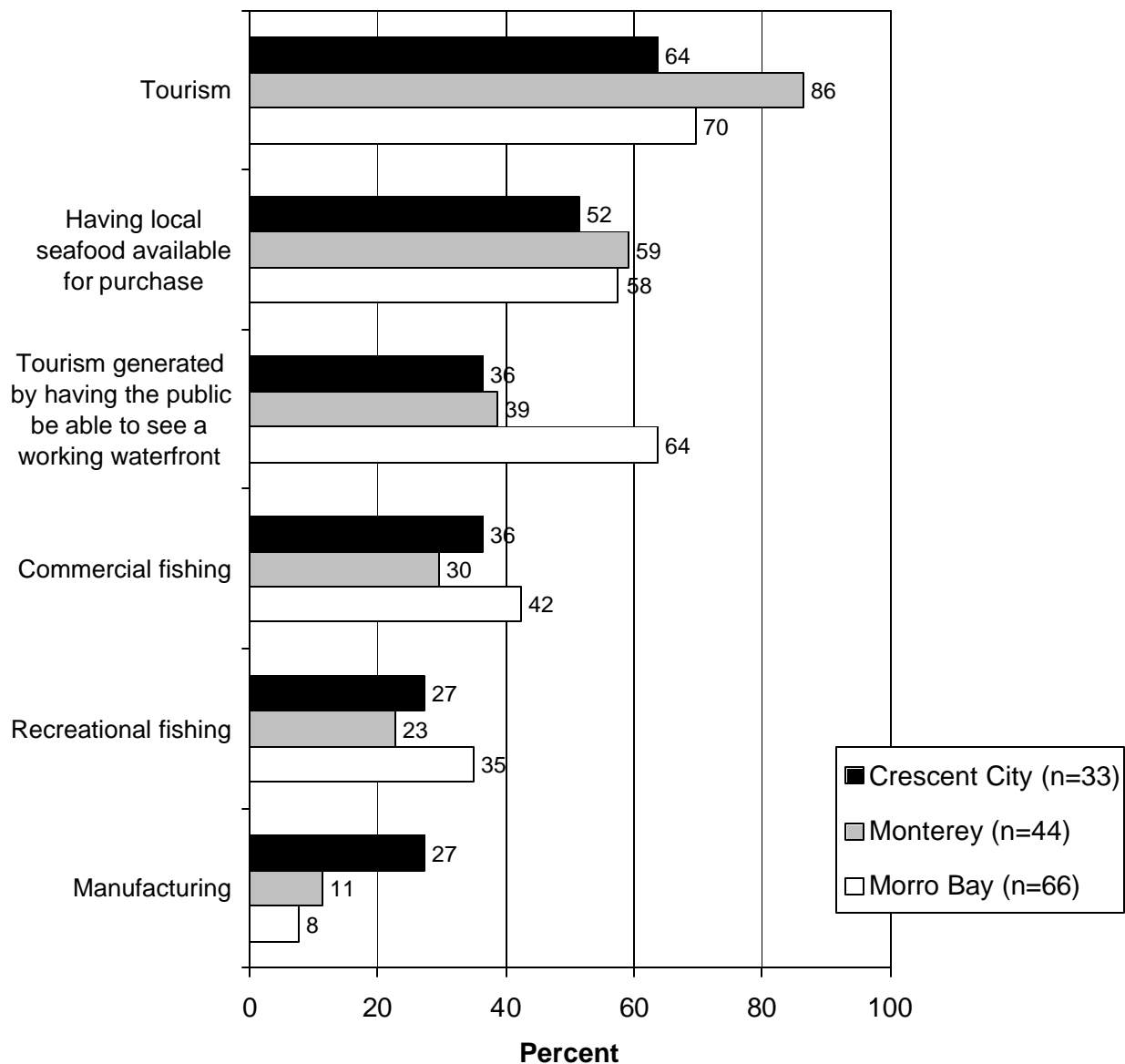
TOURISM AND FISHING HERITAGE

- Tourism professionals 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 included 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 was the most important, having the highest mean rating (9.53) and having the highest percentage of professionals 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) were the next most important factors. These were 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 was manufacturing.
- Crescent City gave notably higher ratings to manufacturing, relative to the other communities.
 - Monterey gave notably higher ratings to tourism, relative to the other communities.
 - Morro Bay gave notably higher ratings to tourism generated by having a working waterfront, relative to the other communities.

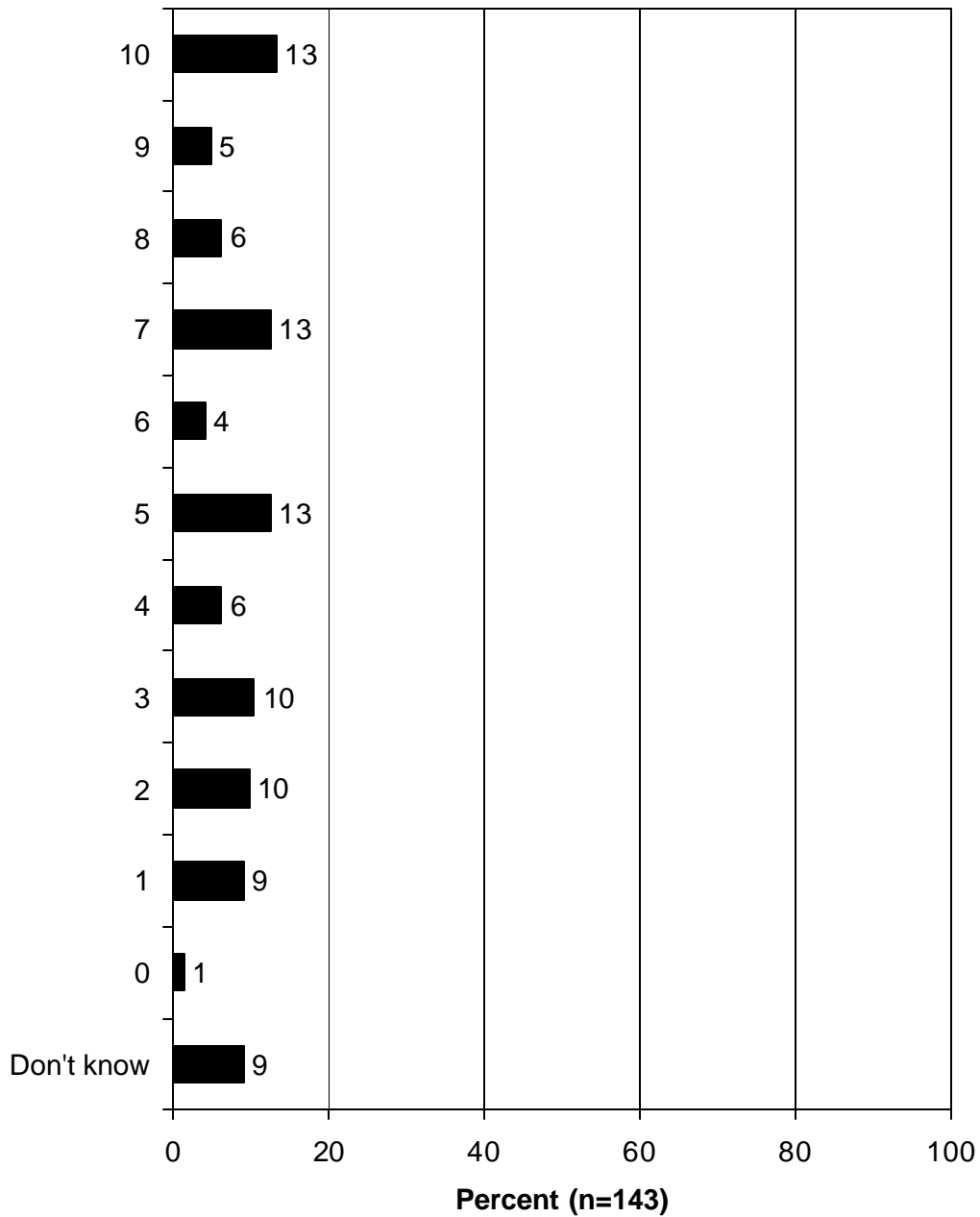
Q14-19. On a scale of 0 - 10, where 0 is "not at all important" and 10 is "extremely important," the mean rating of importance for the following factors on the coastal community's economy.



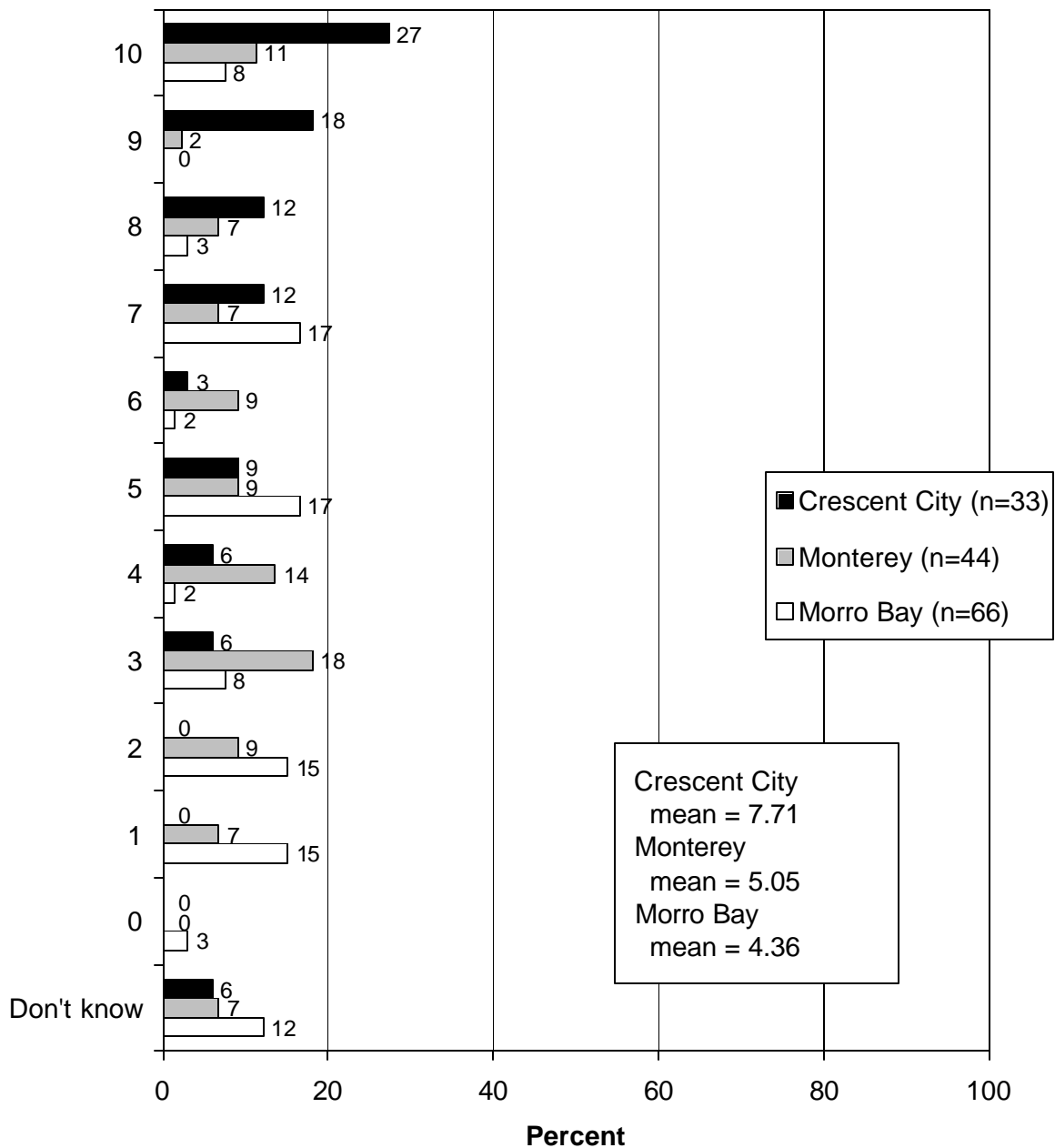
Q14-19. Percentage giving a rating of 10 for the importance of the following on the economy of their community (using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important). (Ranked by the total.)



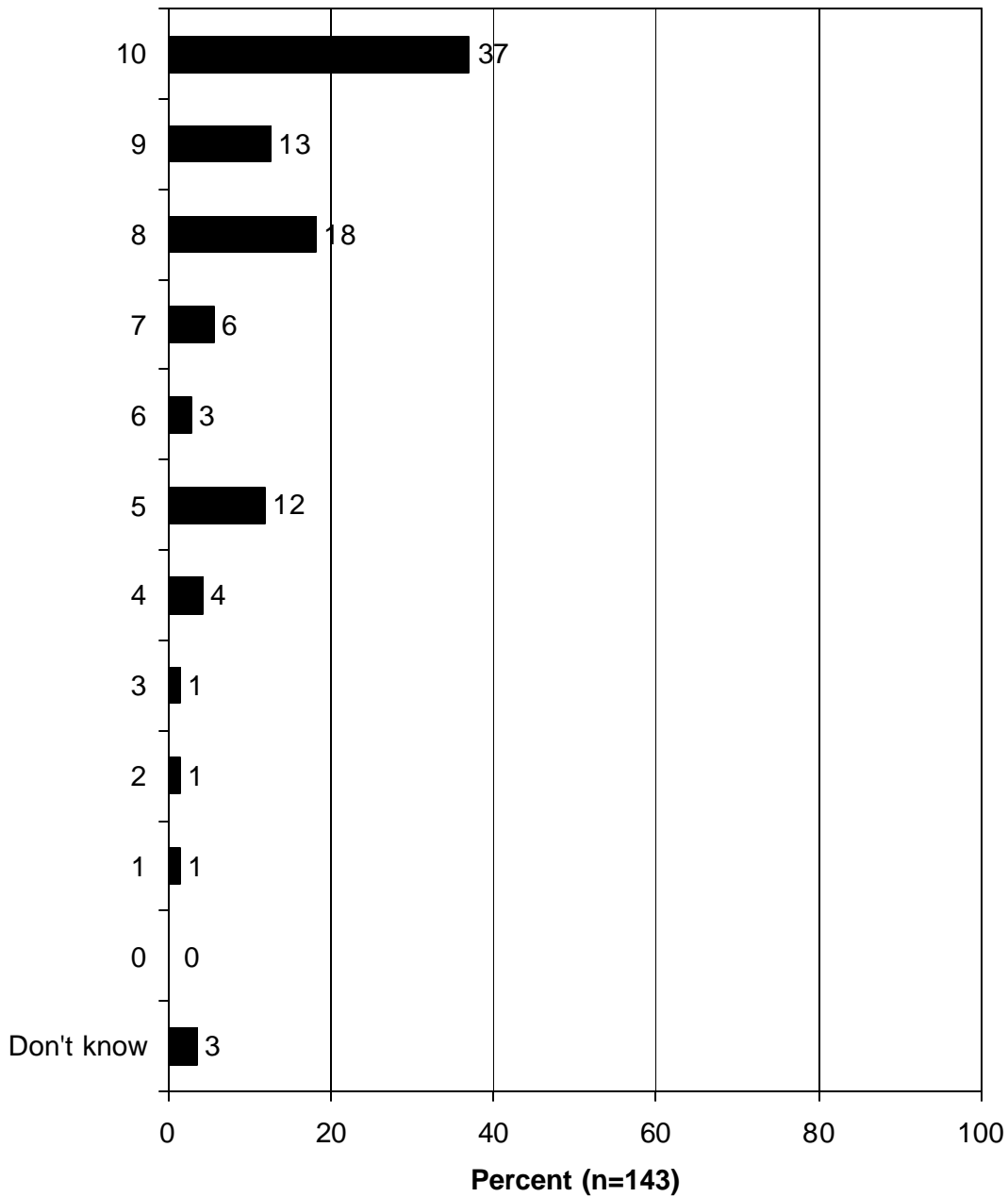
Q14. What about manufacturing?
(Please rate the importance of manufacturing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



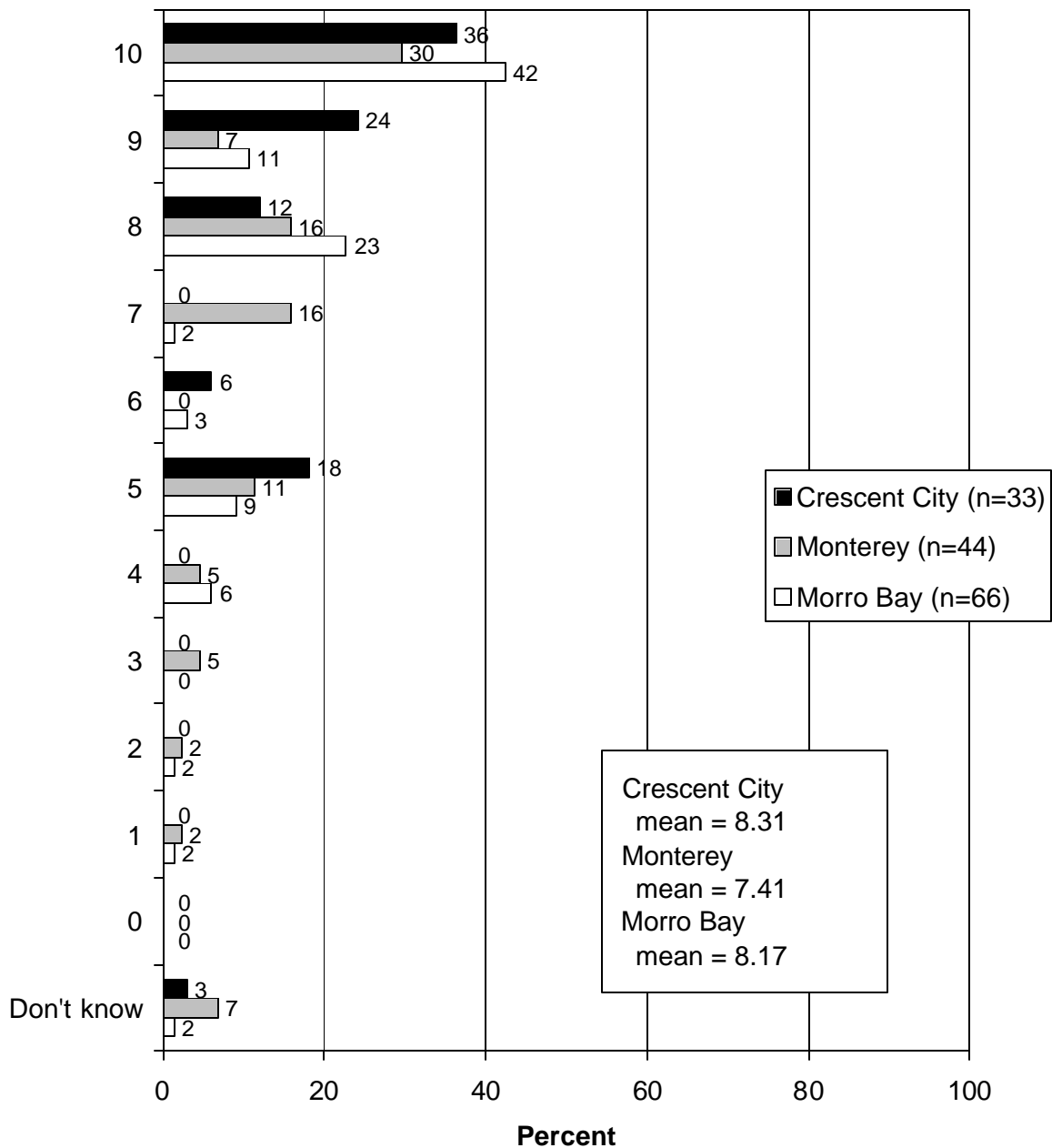
Q14. What about manufacturing?
 (Please rate the importance of manufacturing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



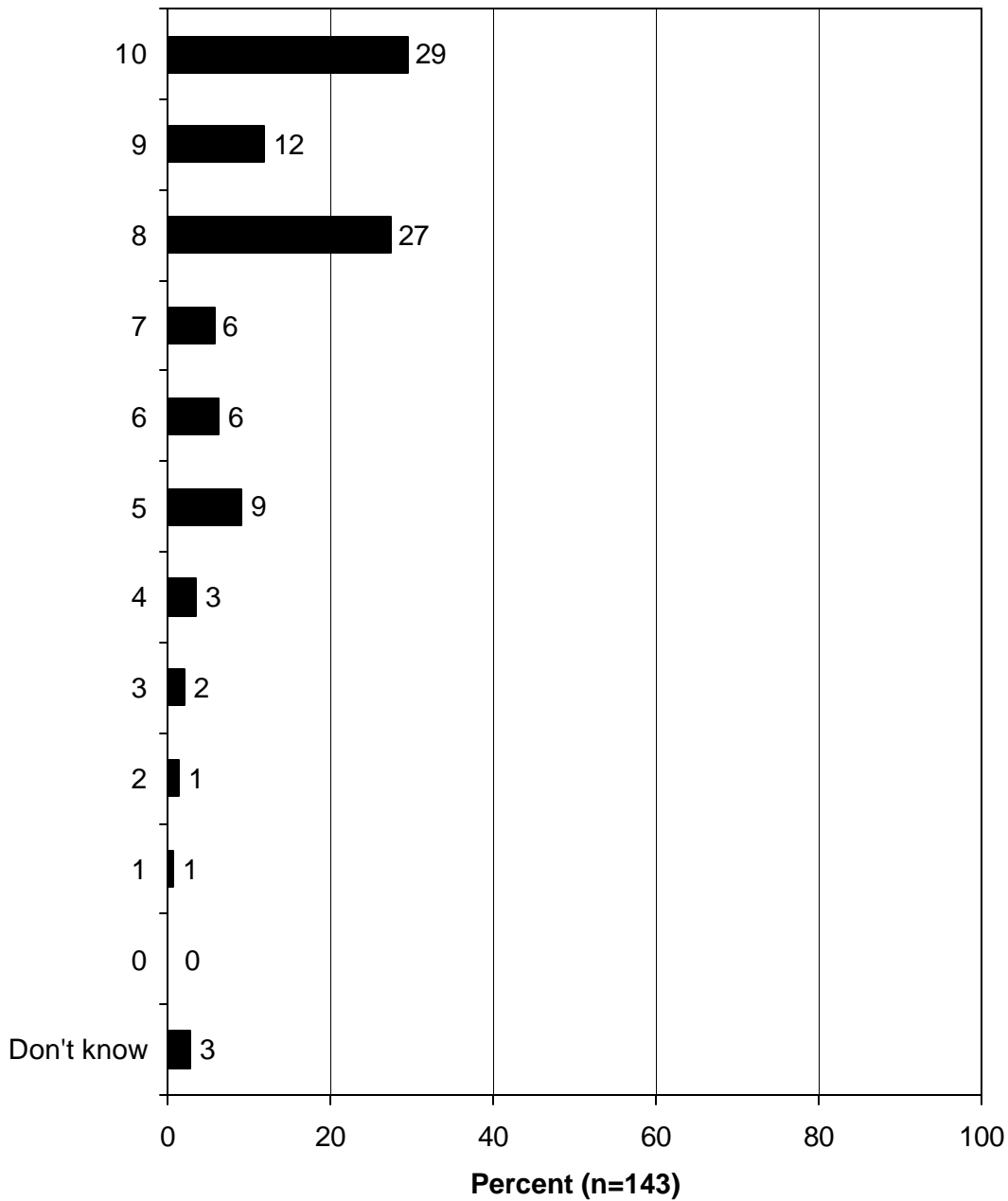
Q15. What about commercial fishing?
(Please rate the importance of commercial fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



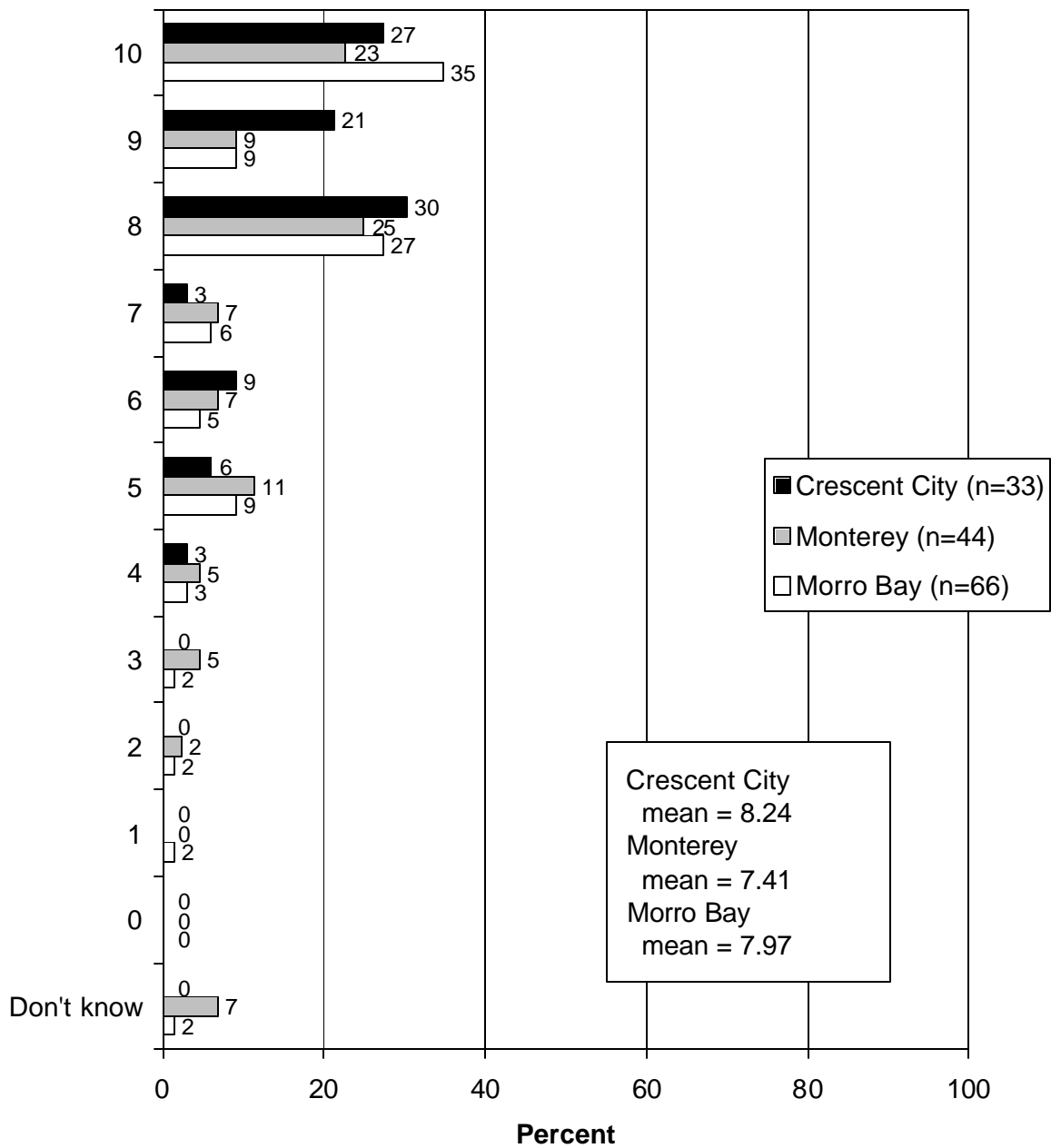
Q15. What about commercial fishing?
 (Please rate the importance of commercial fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



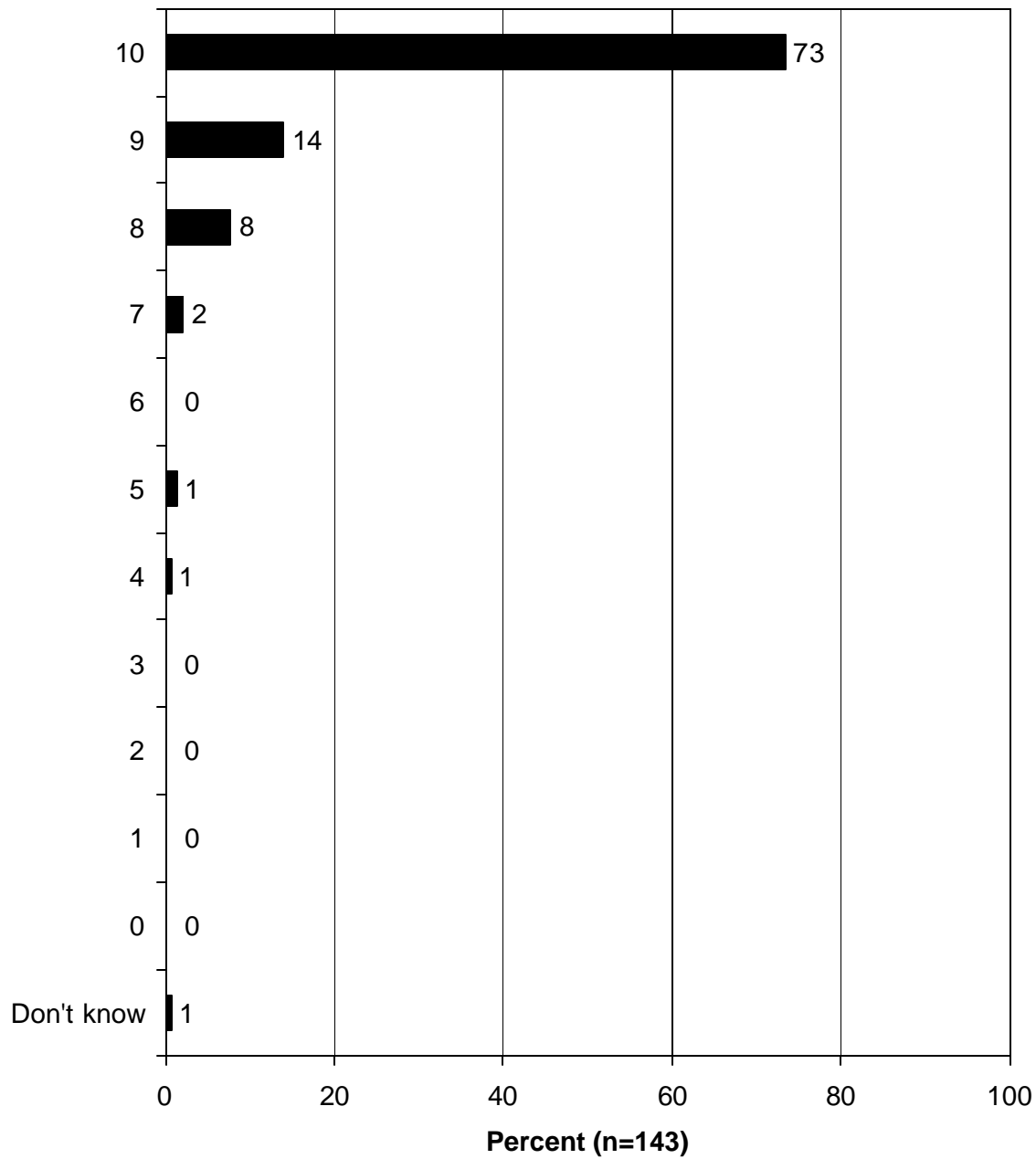
Q16. What about recreational fishing?
(Please rate the importance of recreational fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



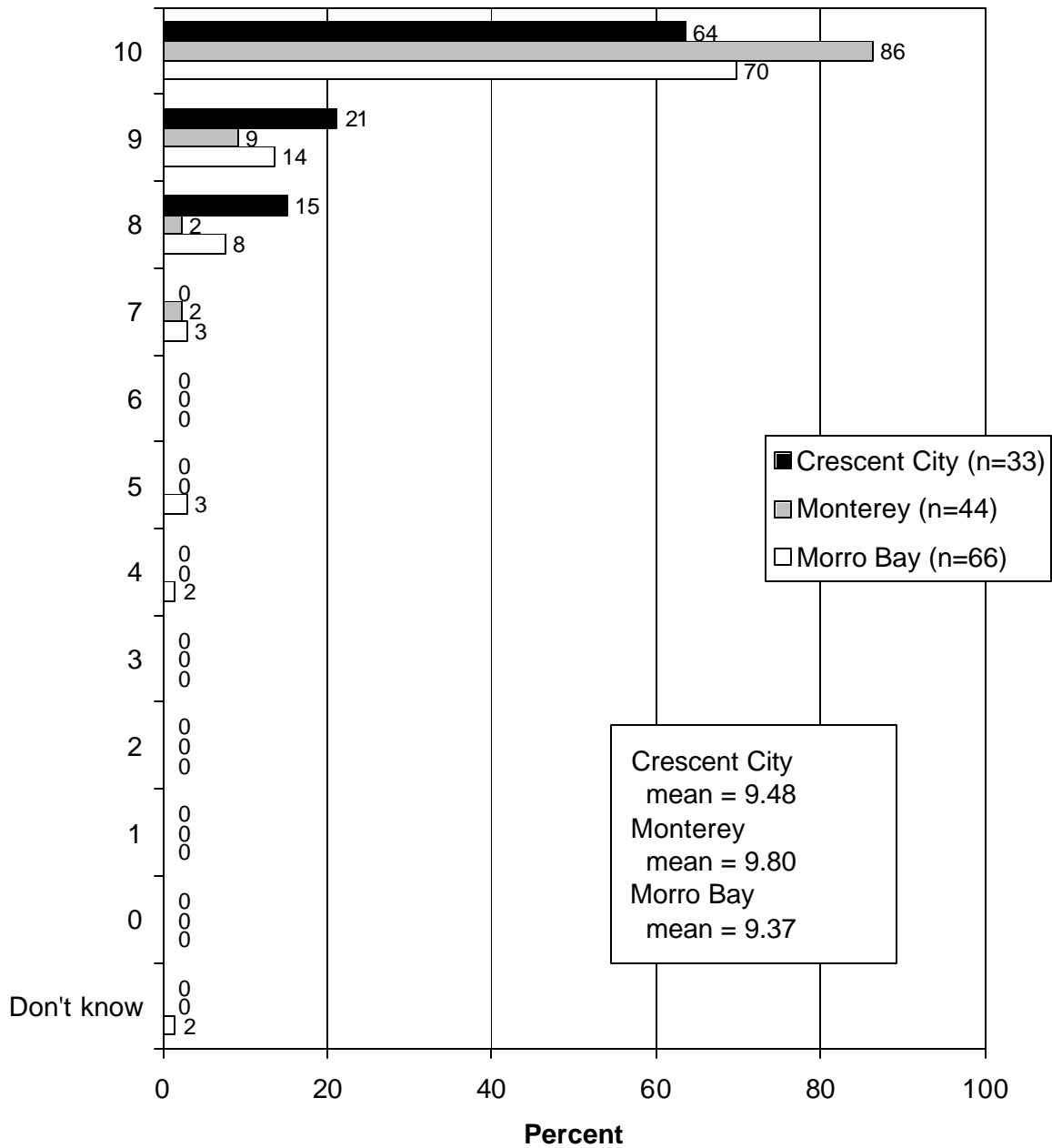
Q16. What about recreational fishing?
 (Please rate the importance of recreational fishing on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



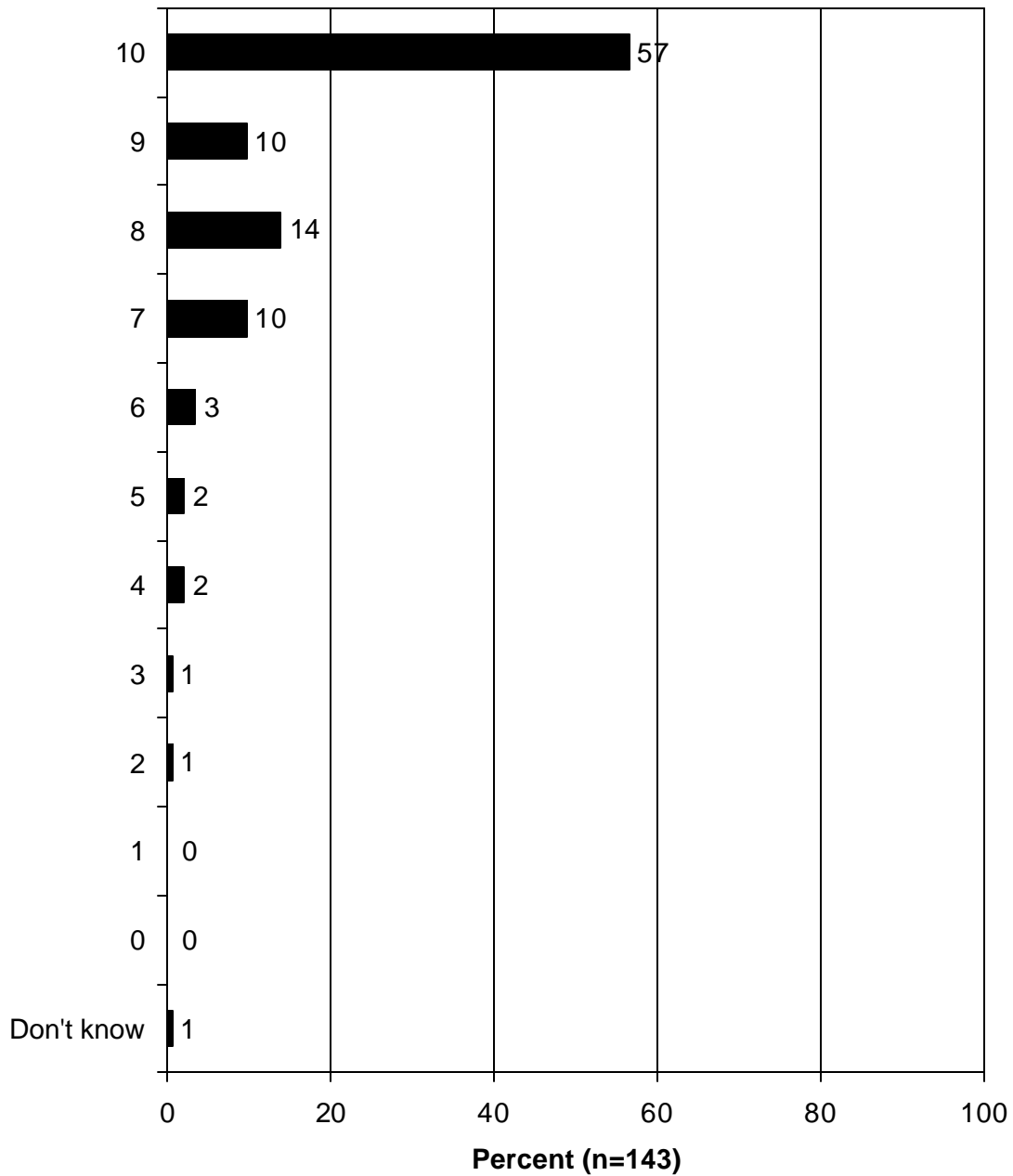
Q17. What about tourism?
(Please rate the importance of tourism on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



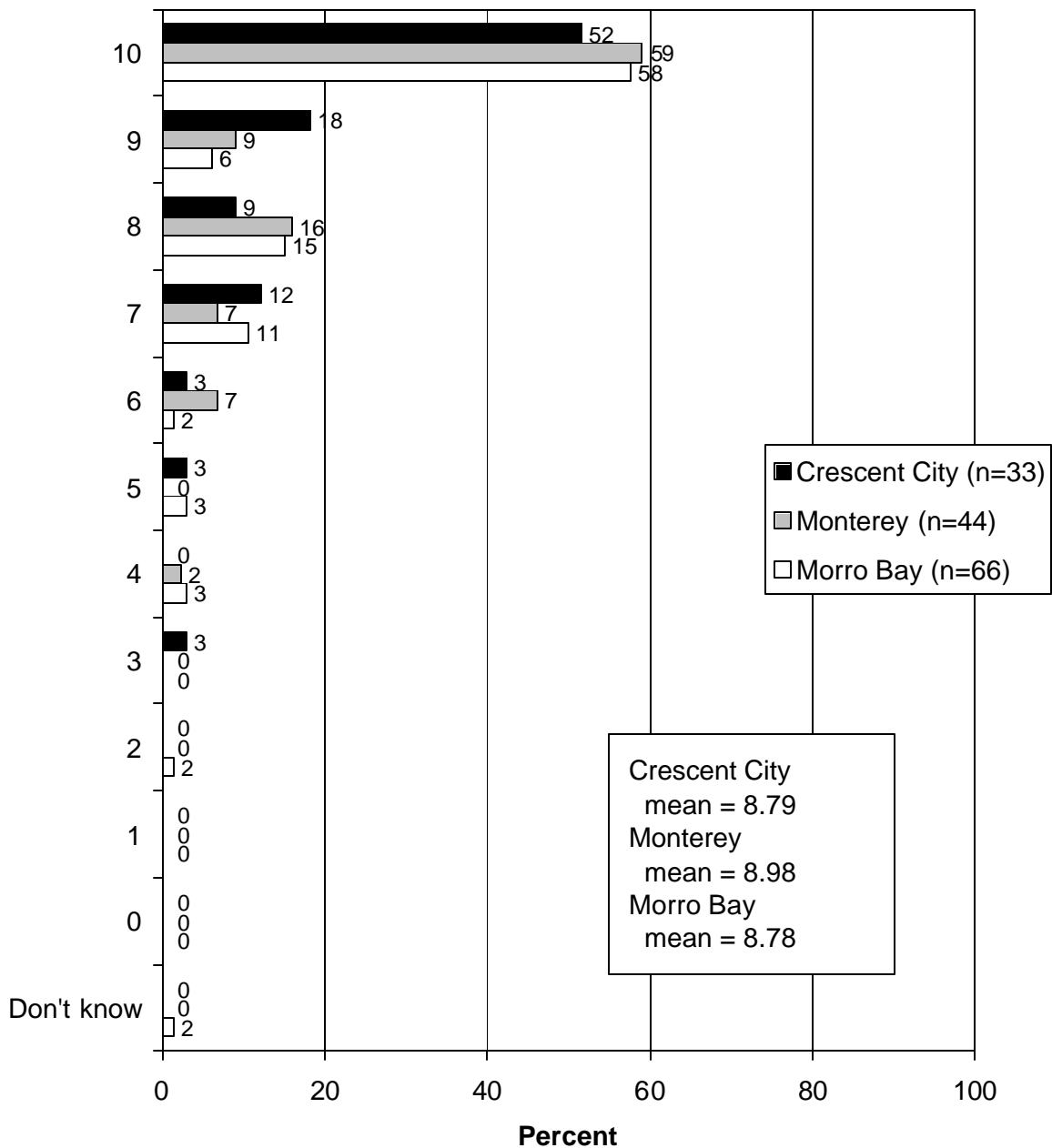
Q17. What about tourism?
 (Please rate the importance of tourism on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



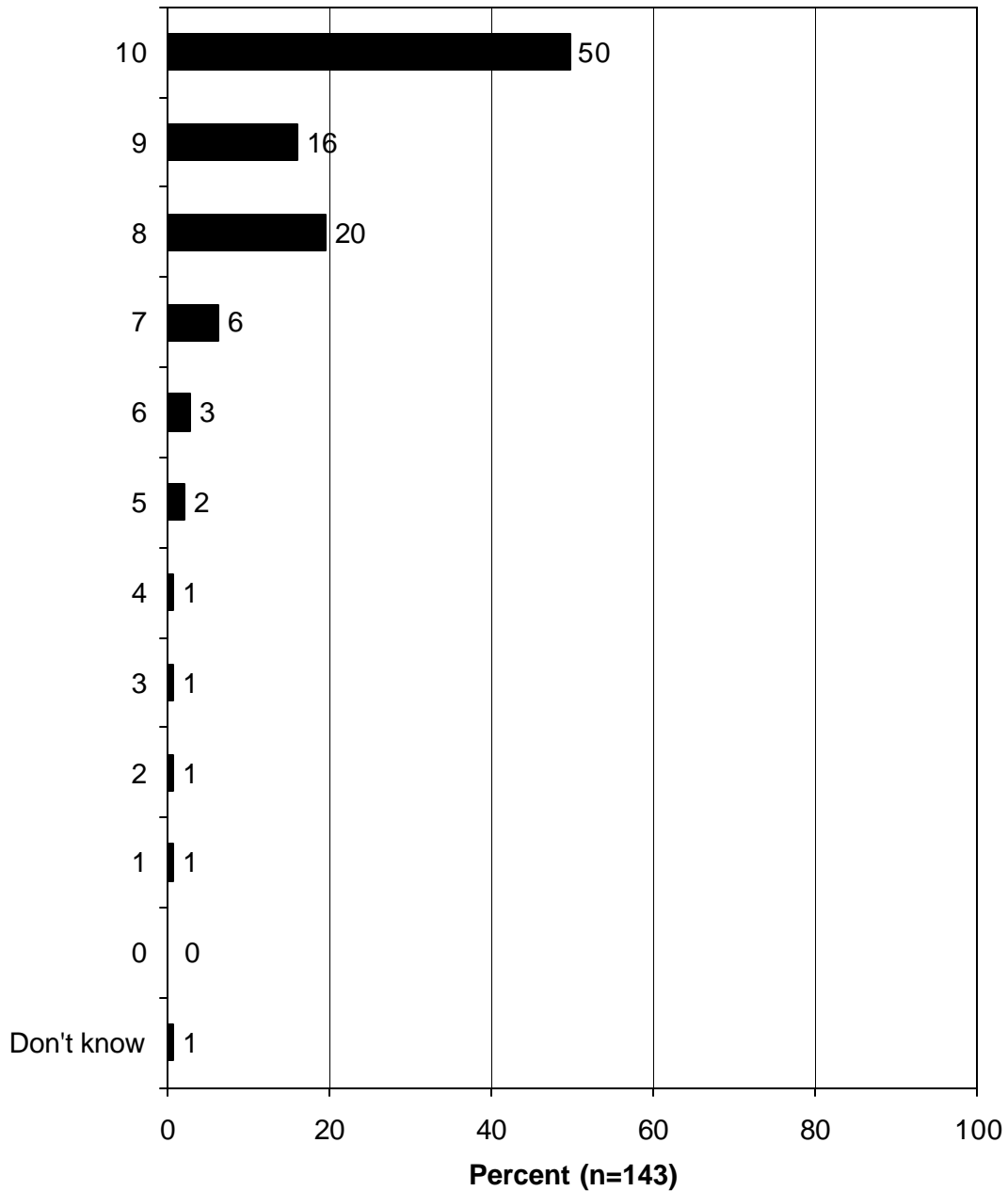
Q18. What about having local seafood available for purchase? (Please rate the importance of having local seafood available on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



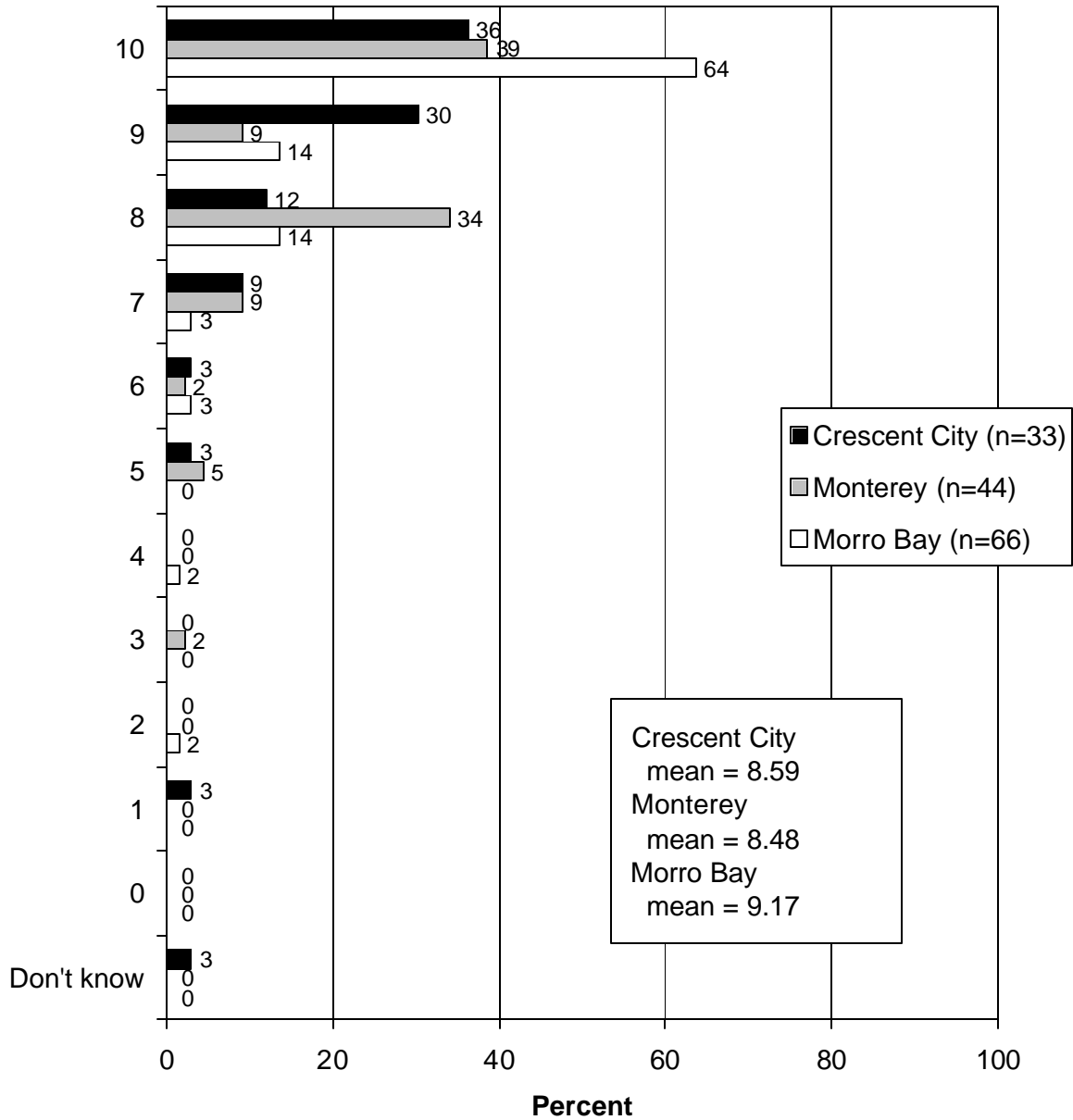
Q18. What about having local seafood available for purchase? (Please rate the importance of local seafood on your community's economy using a scale of 0 to 10, with 0 being not at all important and 10 being extremely important.)



**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.)

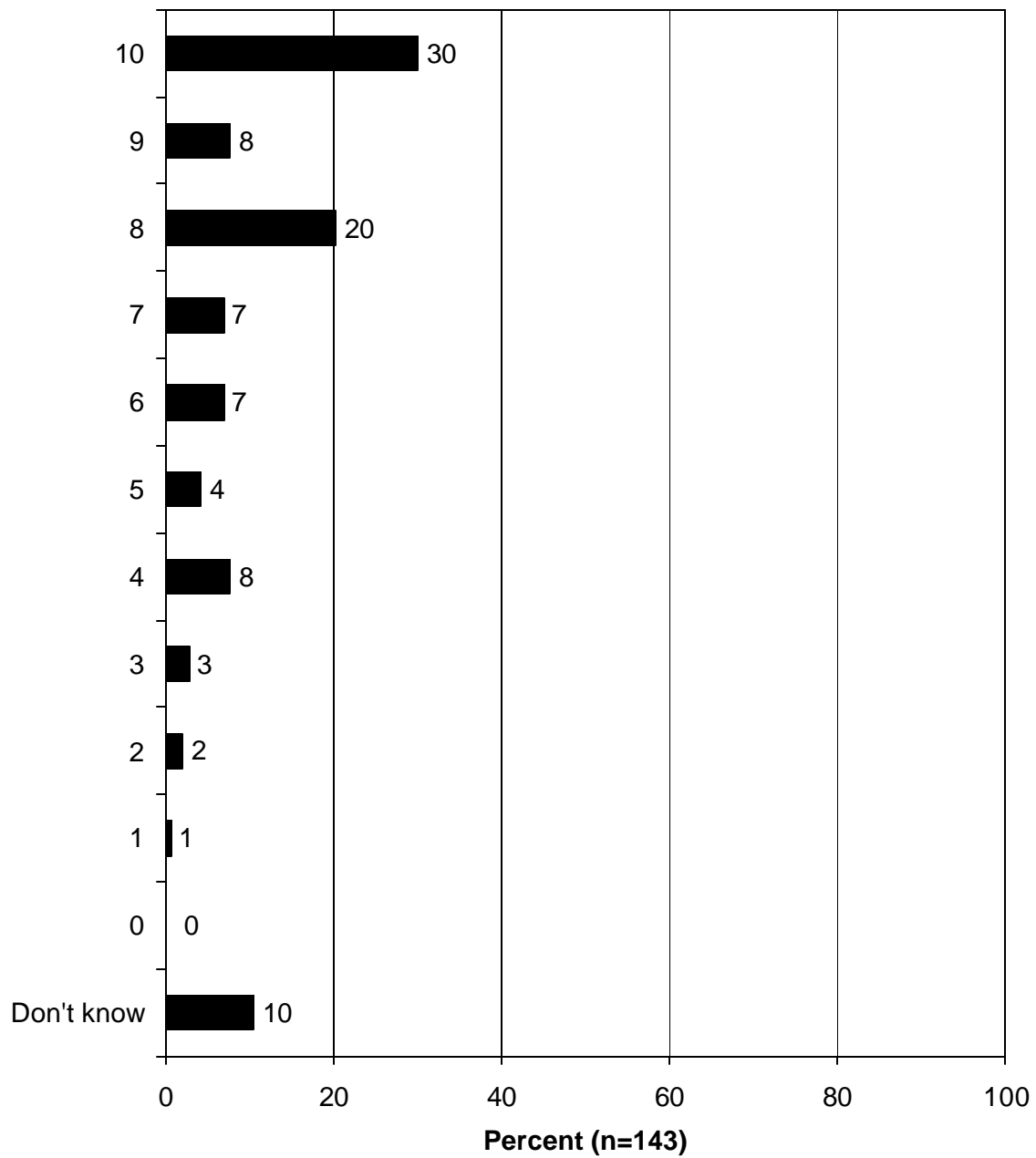


IMPORTANCE OF JOBS CREATED BY FISHING ACTIVITIES

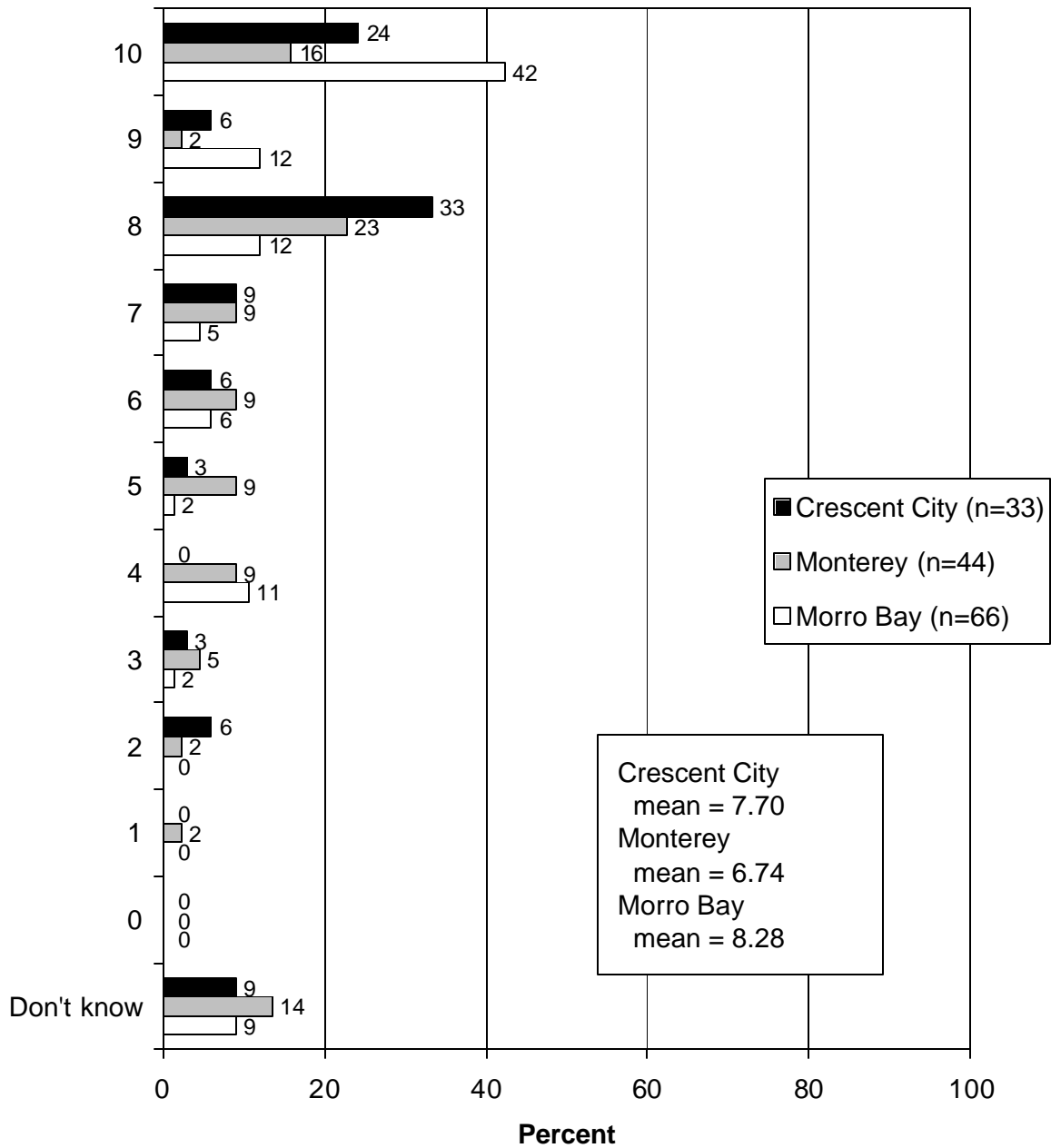
- Overall, 58% of tourism professionals indicated that the number of jobs *directly* created by fishing activities was of great importance to their community's economy (rated 8 or above on a scale of 0 to 10); 29% gave a moderate rating (from 3-7); and 3% indicated that the actual number of jobs *directly* created by fishing activities was of low importance to the community's economy (rated 0-2).
 - Morro Bay respondents gave higher ratings concerning the importance of the number of jobs *directly* created by fishing activities, relative to 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 reporting that this factor was of great importance to their community's economy (rated 8 or above), 29% rating this factor of moderate importance (rated 3-7), and 4% indicating that the number of jobs *indirectly* created by fishing activities was of low importance to the community's economy (rated 0-2).

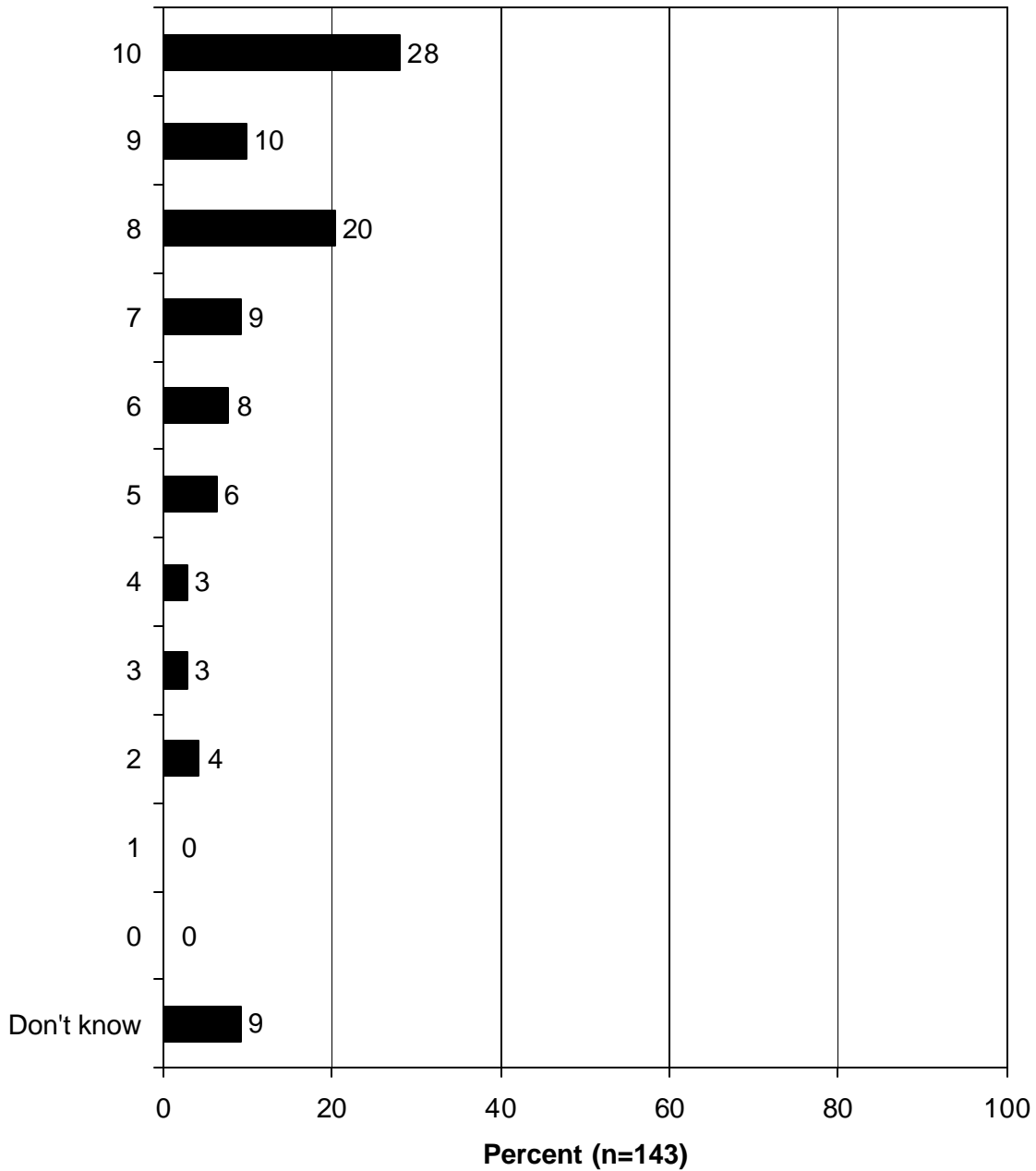
Q20. Please rate the importance of the actual number of jobs *directly* created by fishing activities on your community's economy.



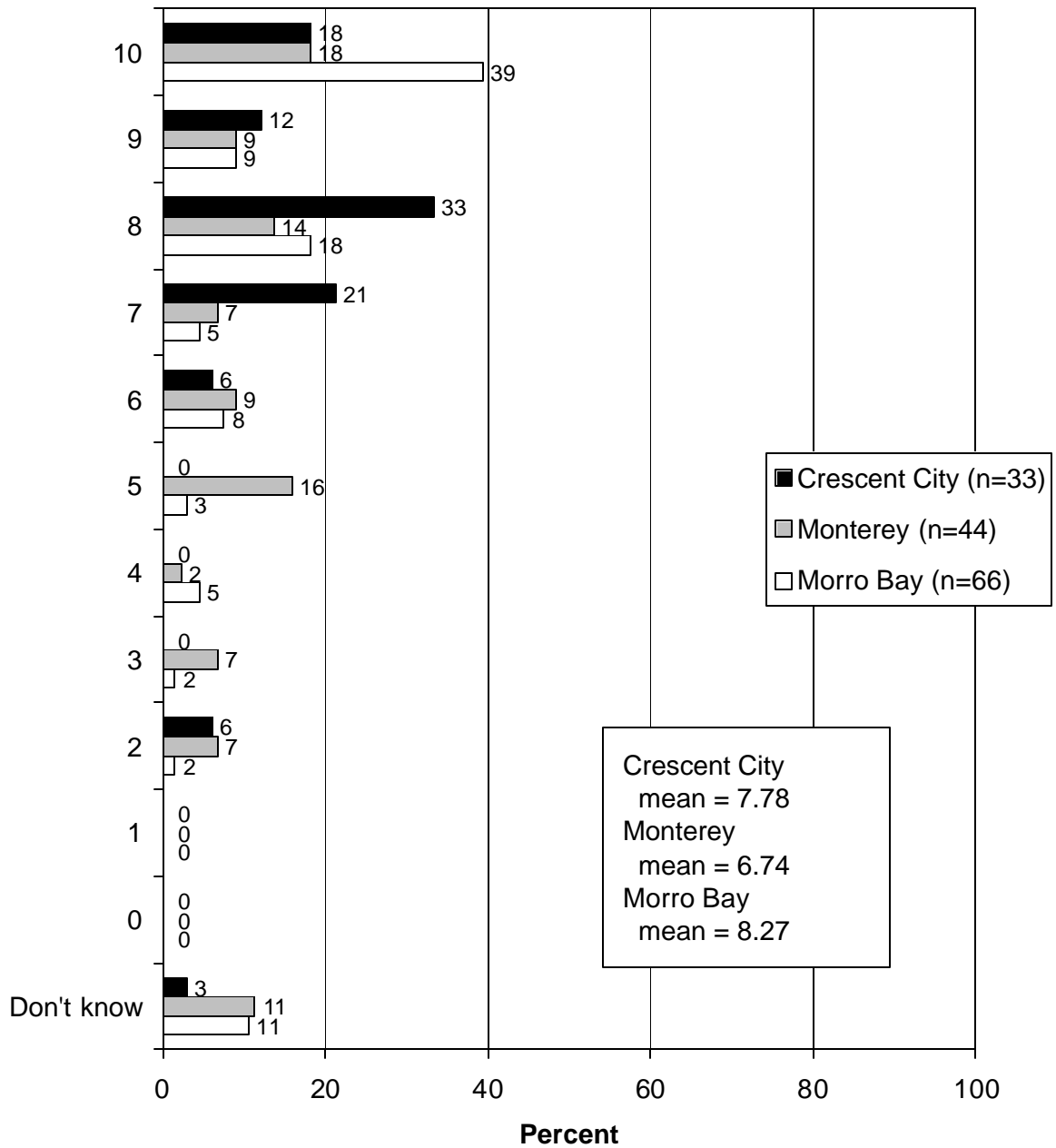
Q20. Please rate the importance of the actual number of jobs *directly* created by fishing activities on your community's economy.



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.

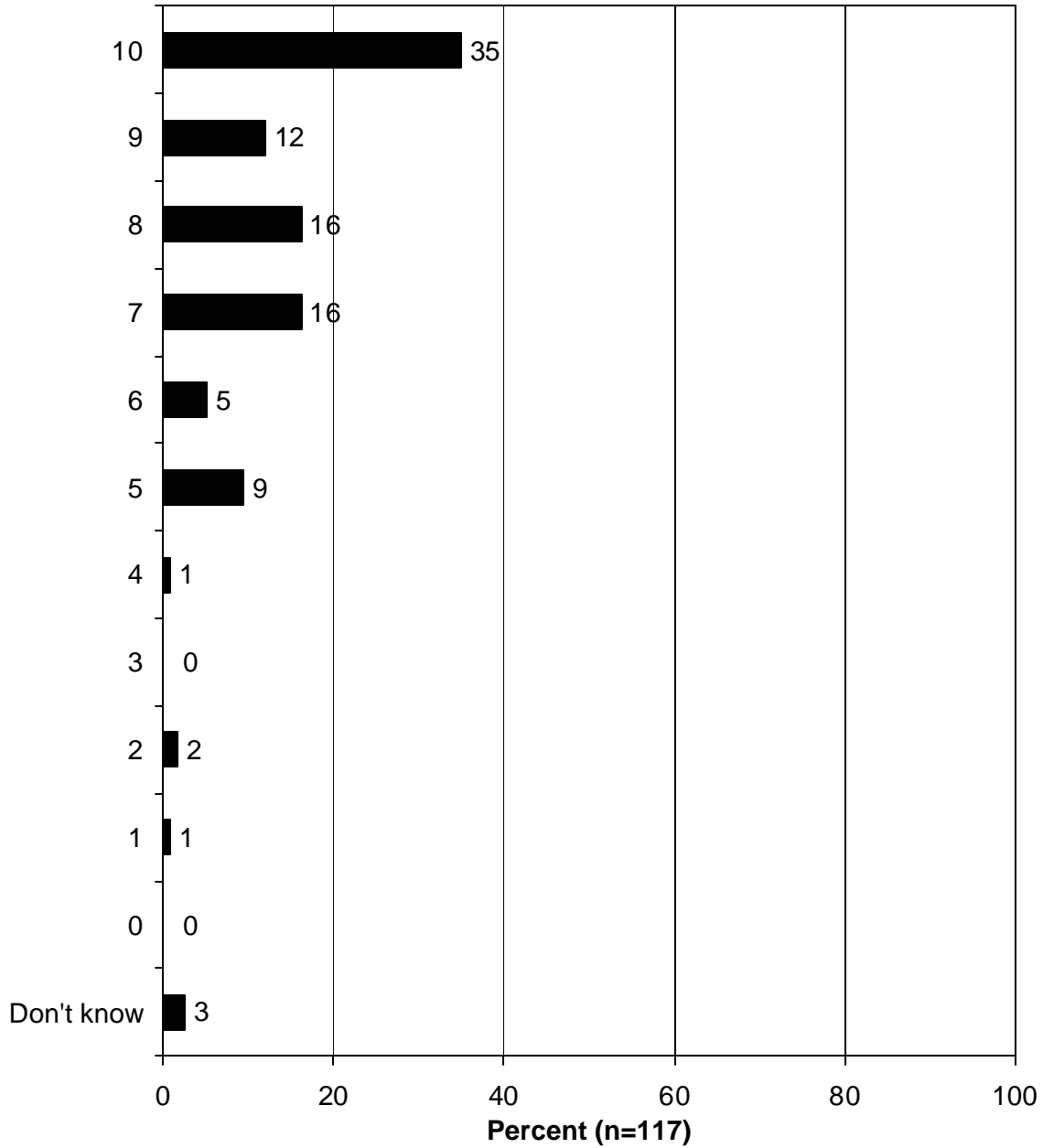


IMPORTANCE OF FISHING HERITAGE AND LOCAL SEAFOOD IN ATTRACTING BUSINESS

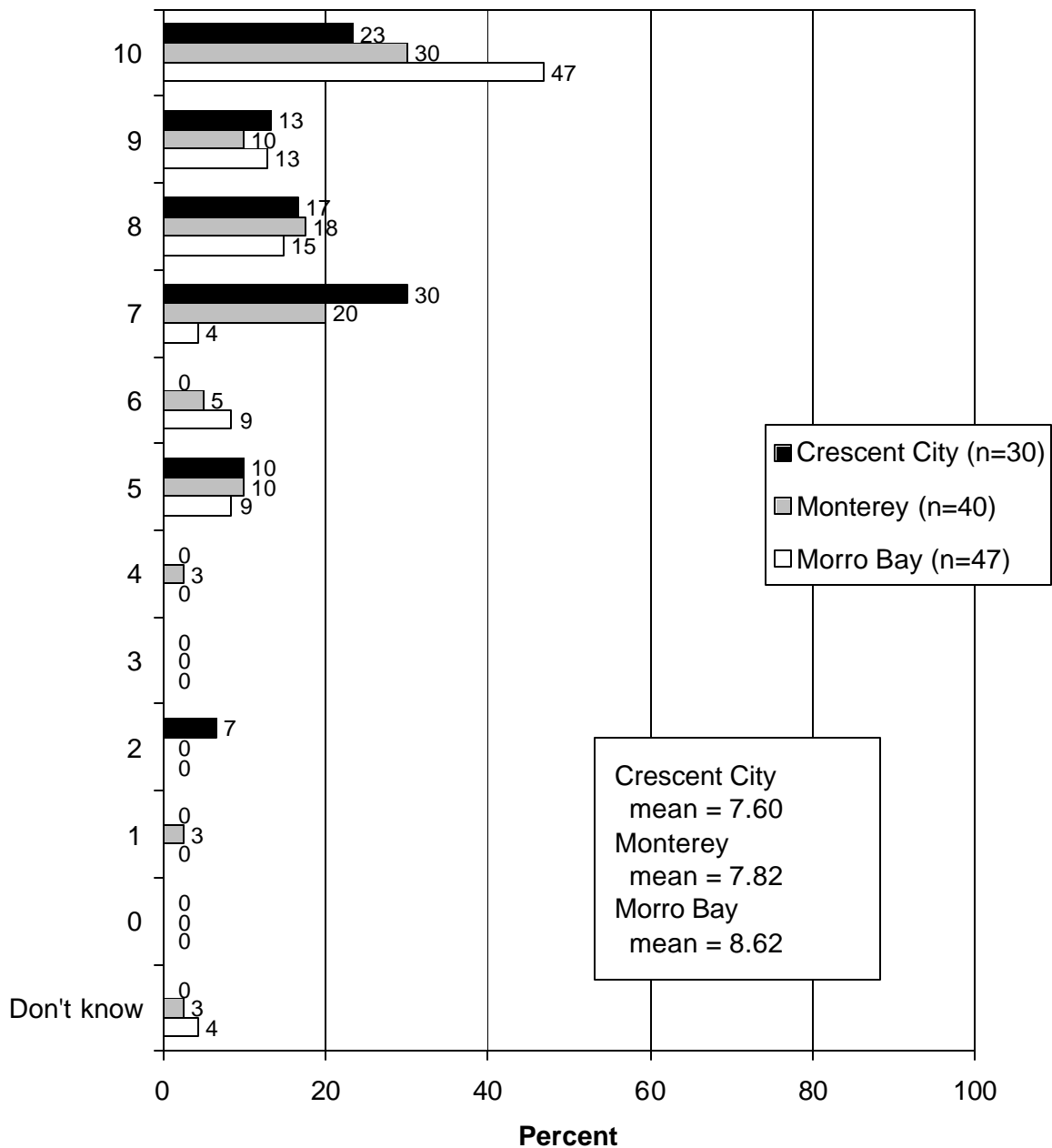
- Nearly two-thirds of all tourism professionals surveyed, 63%, indicated that the fishing heritage of their community was of great importance in attracting business to their community (rated 8 or above); 31% rated its importance as moderate (rated 3-7); and only 3% indicated that fishing heritage was of low importance in attracting business to their community (rated 0-2).
 - Morro Bay gave notably higher ratings to fishing heritage, relative to the other communities.

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

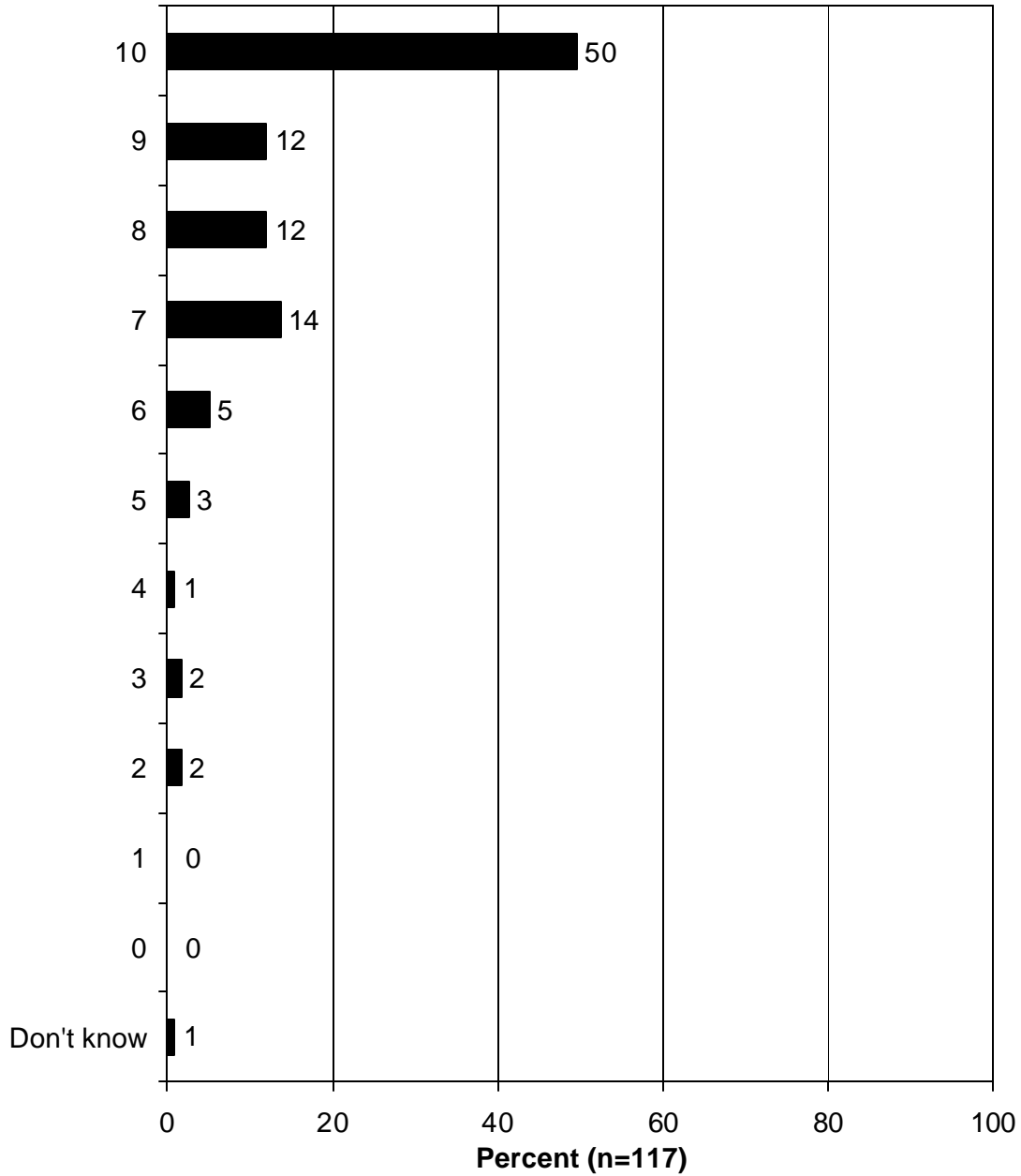
Q23. How important or unimportant is the fishing heritage of your community in attracting business to your community? (Asked of those whose organization works to attract business to their community.)



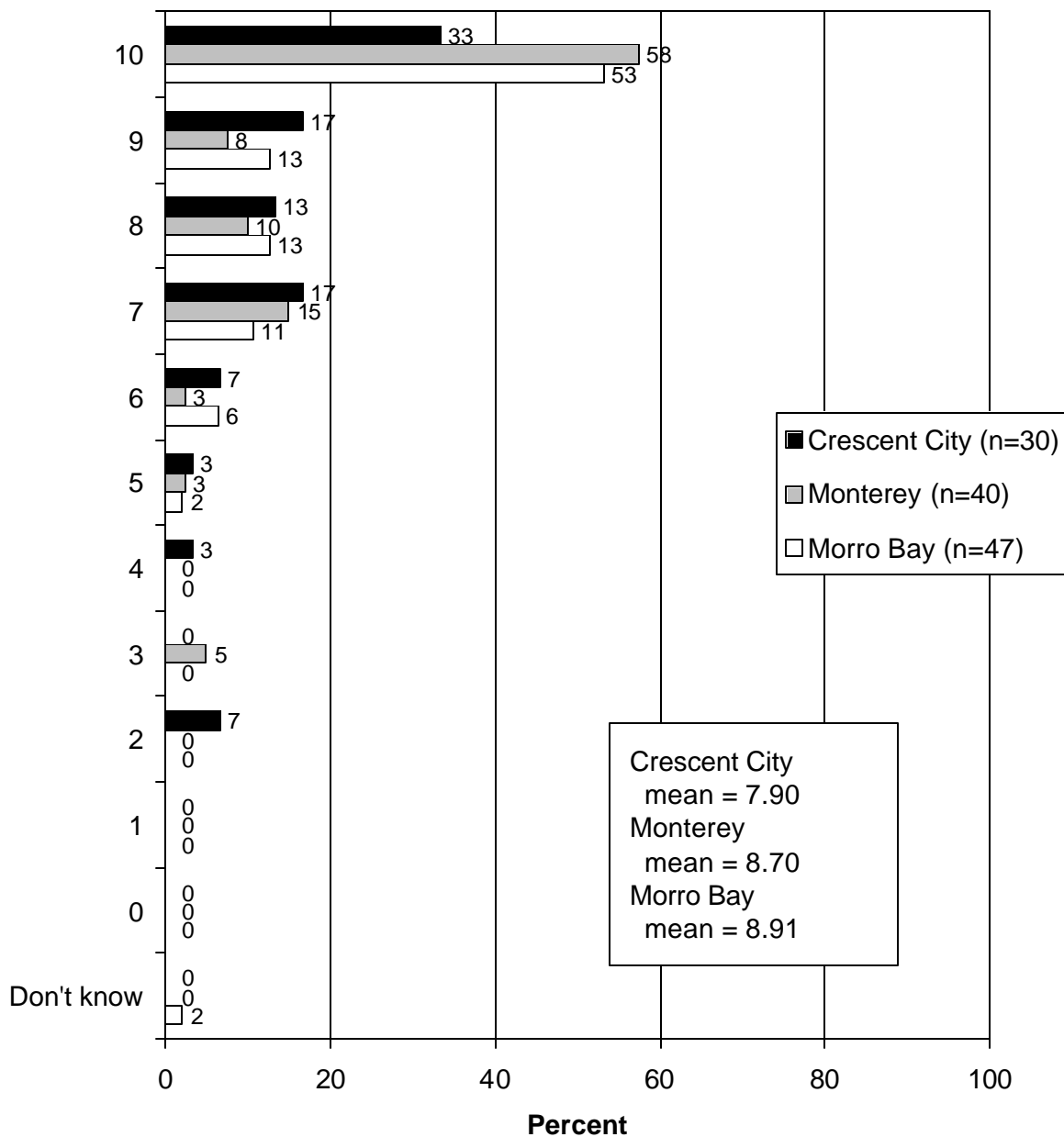
Q23. How important or unimportant is the fishing heritage of your community in attracting business to your community? (Asked of those whose organization works to attract business to their community.)



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.)



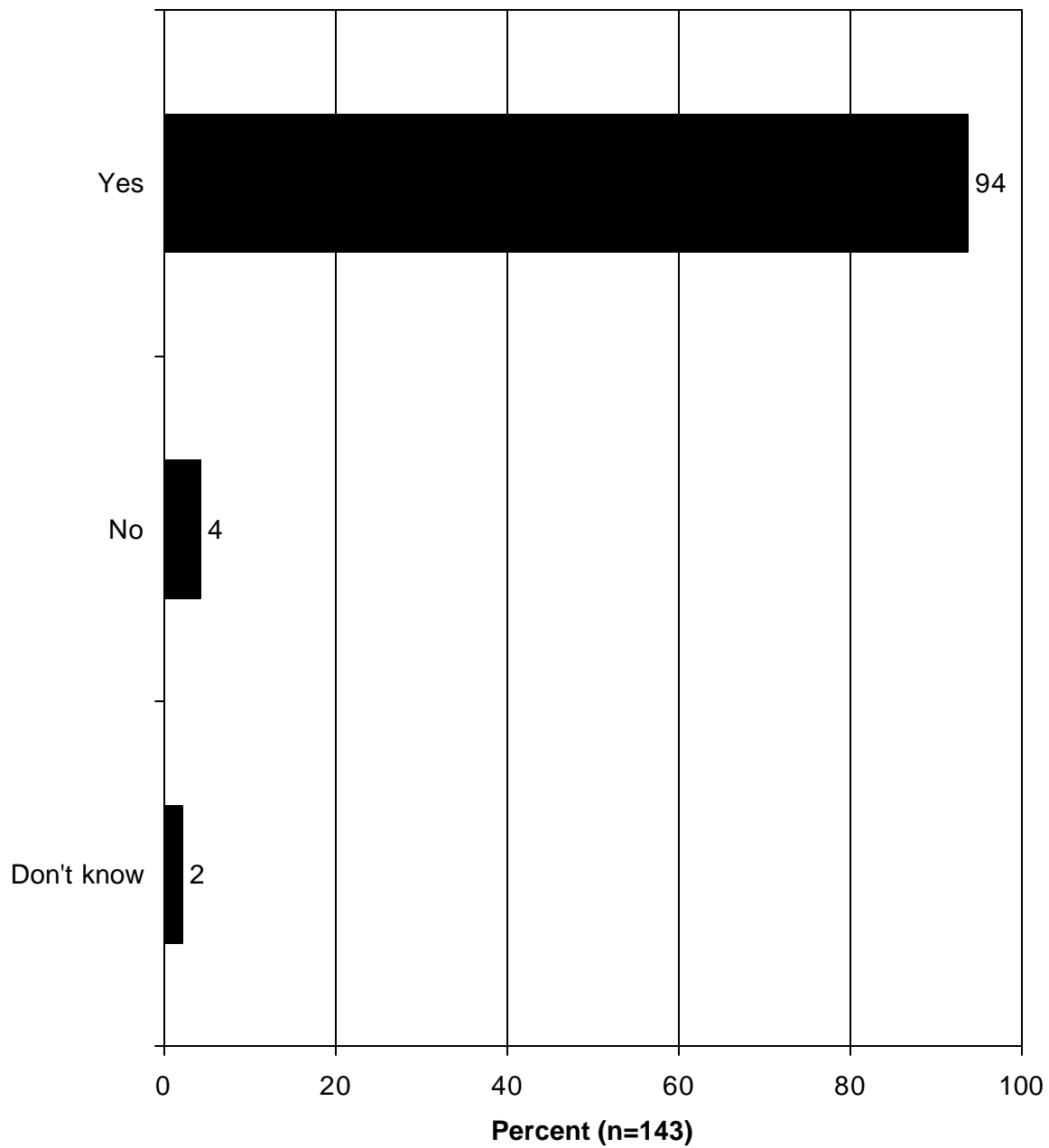
ACCESSIBILITY OF LOCAL TOURISM AND BUSINESS INFORMATION

- Tourism professionals appear to be well informed of various media promoting their local community. Almost all, 94%, tourism professionals are aware of brochures or websites that promote tourism and business in the Monterey Peninsula, Morro Bay area, or Crescent City area. Only 4% indicated that they are unaware of brochures or websites promoting tourism in their community.

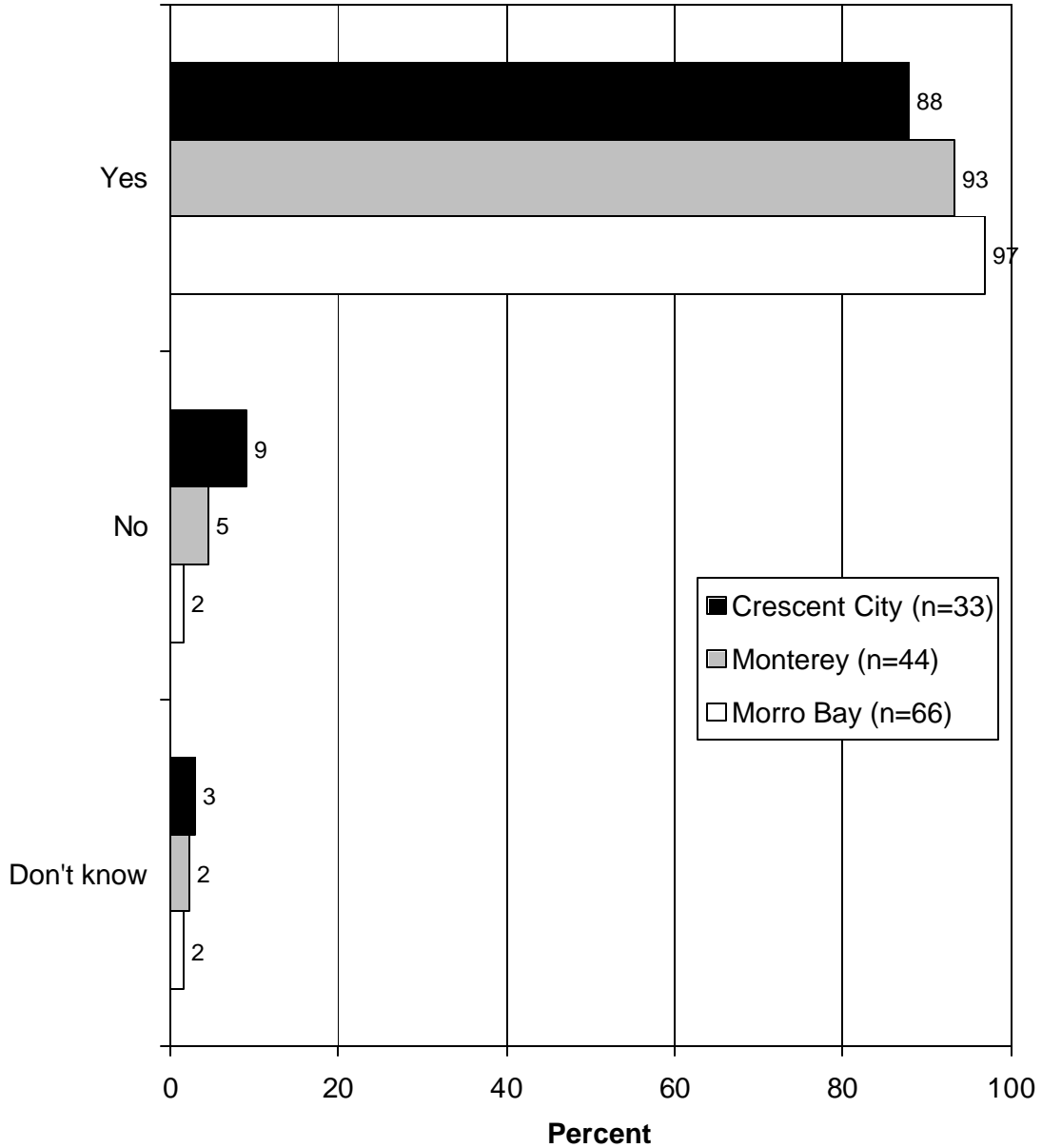
- Marketing and advertising directed toward tourists and potential business appears to feature the community's fishing heritage. When asked if the brochures or websites feature photographs of fishing activities or fishing boats, 74% of all respondents indicated that they do; only 9% reported that the brochures or websites do not feature photographs of fishing activities or fishing boats.

- The local Chamber of Commerce was most often identified as a source of information for California's coastal communities. Nearly two-thirds, 66%, of tourism professionals listed the Chamber of Commerce as the source sponsoring brochures and websites promoting tourism and business in the community. All other sources were identified by less than half of the respondents; these include government agencies, visitor's centers, local organizations, tourist attractions, and hospitality businesses.

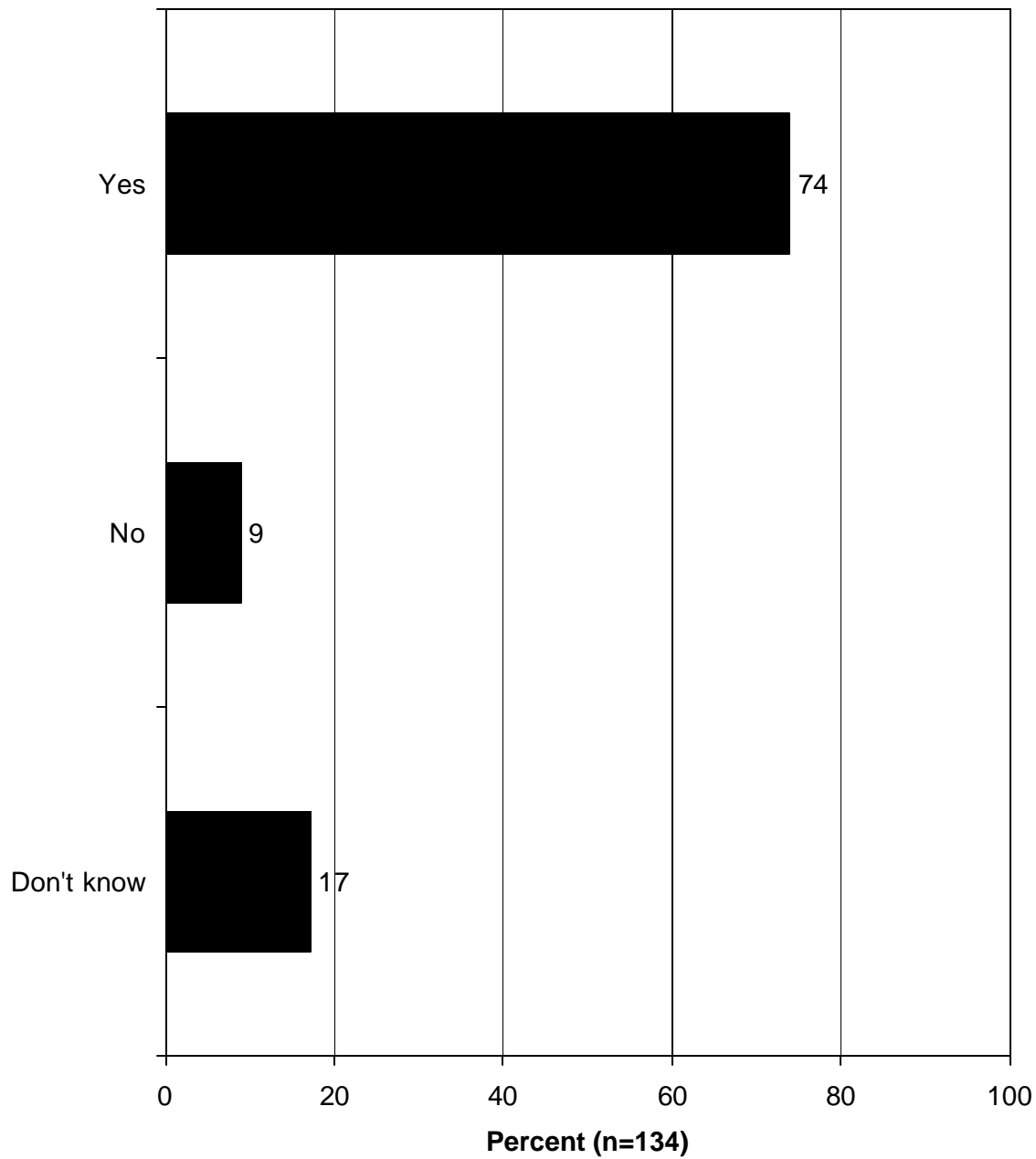
Q26. Are you aware of any brochures or websites that promote tourism and business in the Monterey Peninsula / Morro Bay area / Crescent City area?



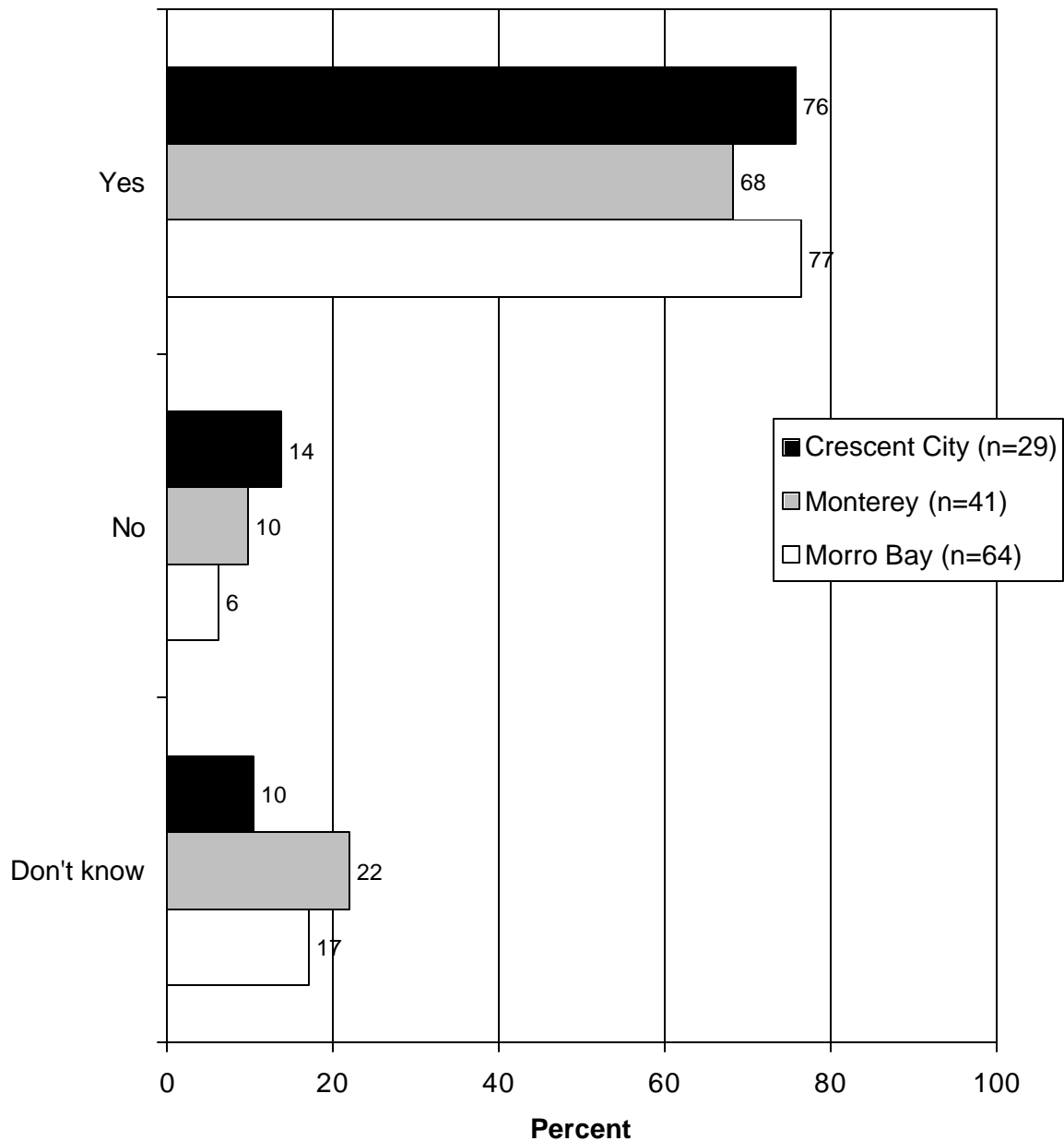
Q26. Are you aware of any brochures or websites that promote tourism and business in the Monterey Peninsula / Morro Bay area / Crescent City area? (Each respondent was asked only about his or her community.)



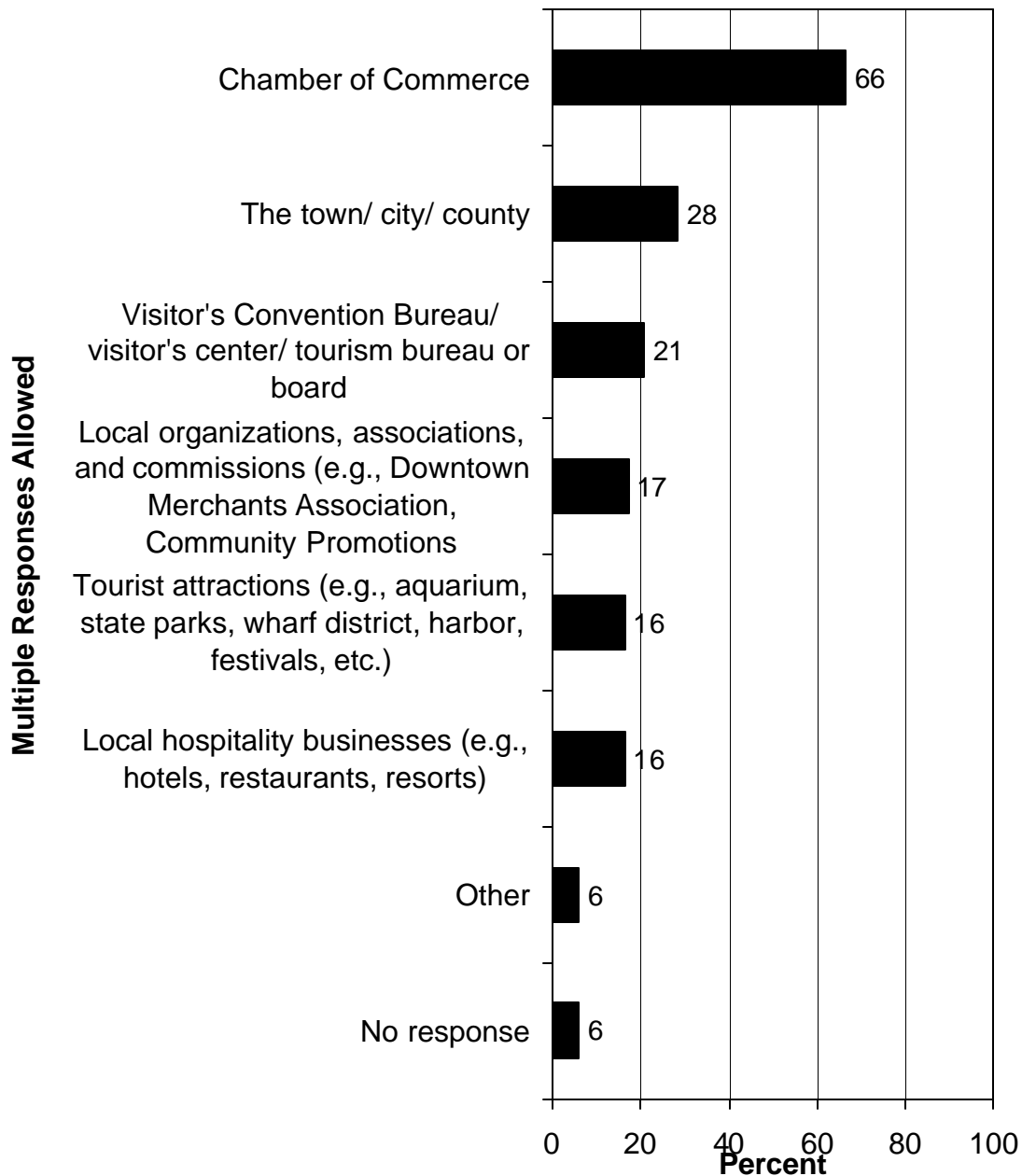
Q28. Do any of the brochures or websites feature fishing photos or fishing boats? (Asked of those who expressed awareness of brochures or websites that promote tourism and business in their community.)



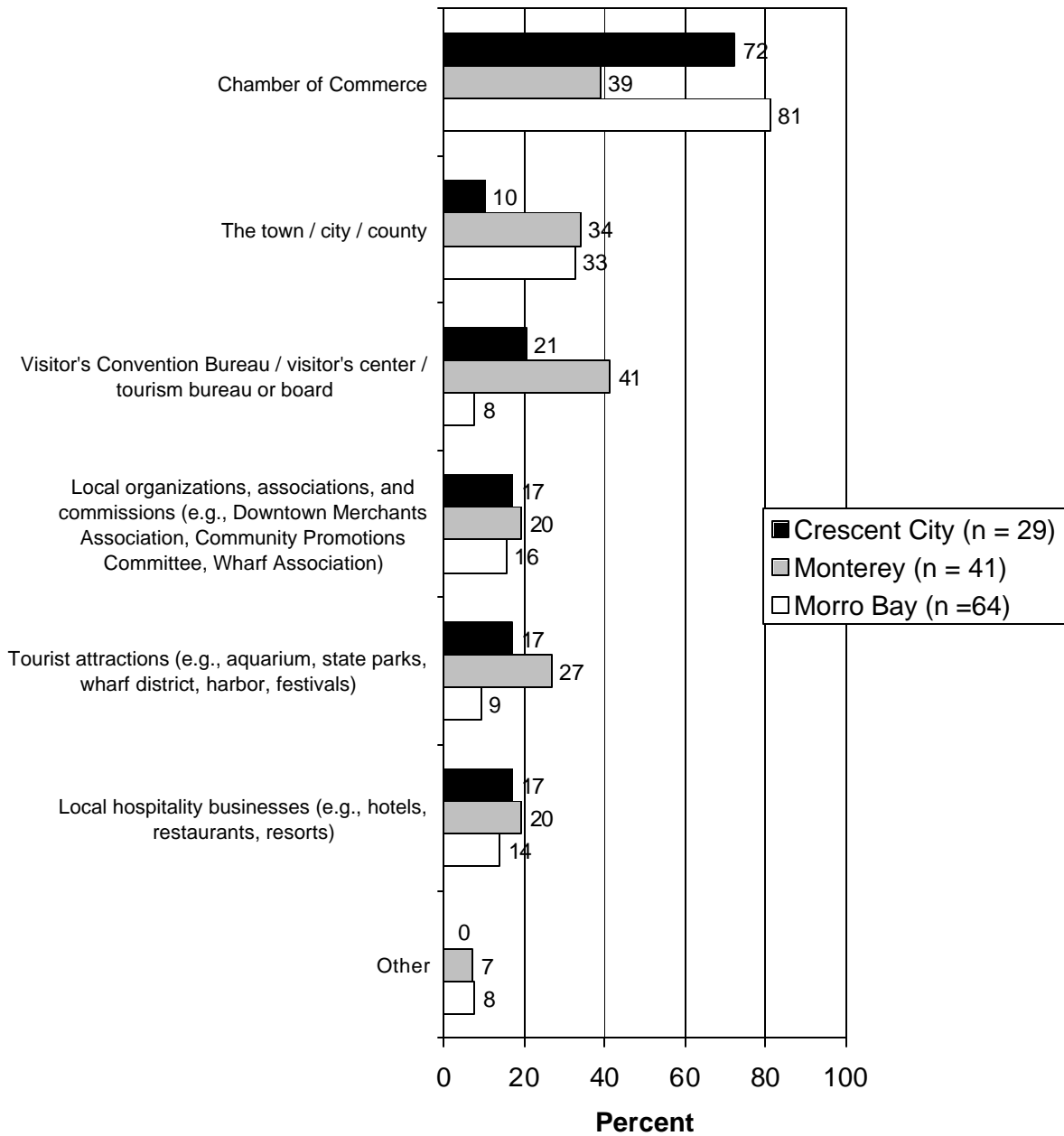
Q28. Do any of the brochures or websites feature fishing photos or fishing boats? (Asked of those who expressed awareness of brochures or websites that promote tourism and business in their community.)



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.)**

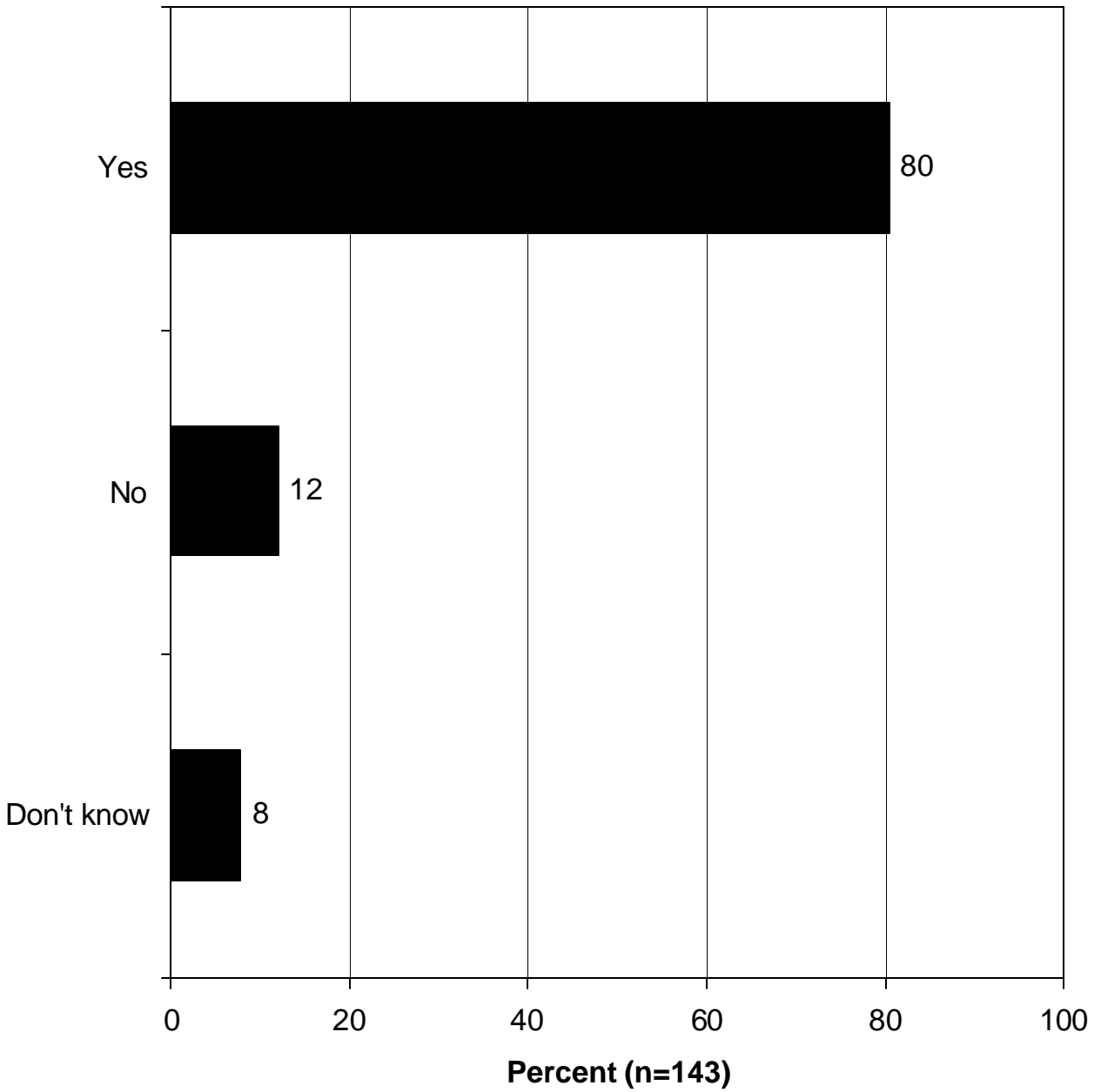


APPRECIATION AND PRESERVATION OF CULTURAL IDENTITY BY LOCAL GOVERNMENT

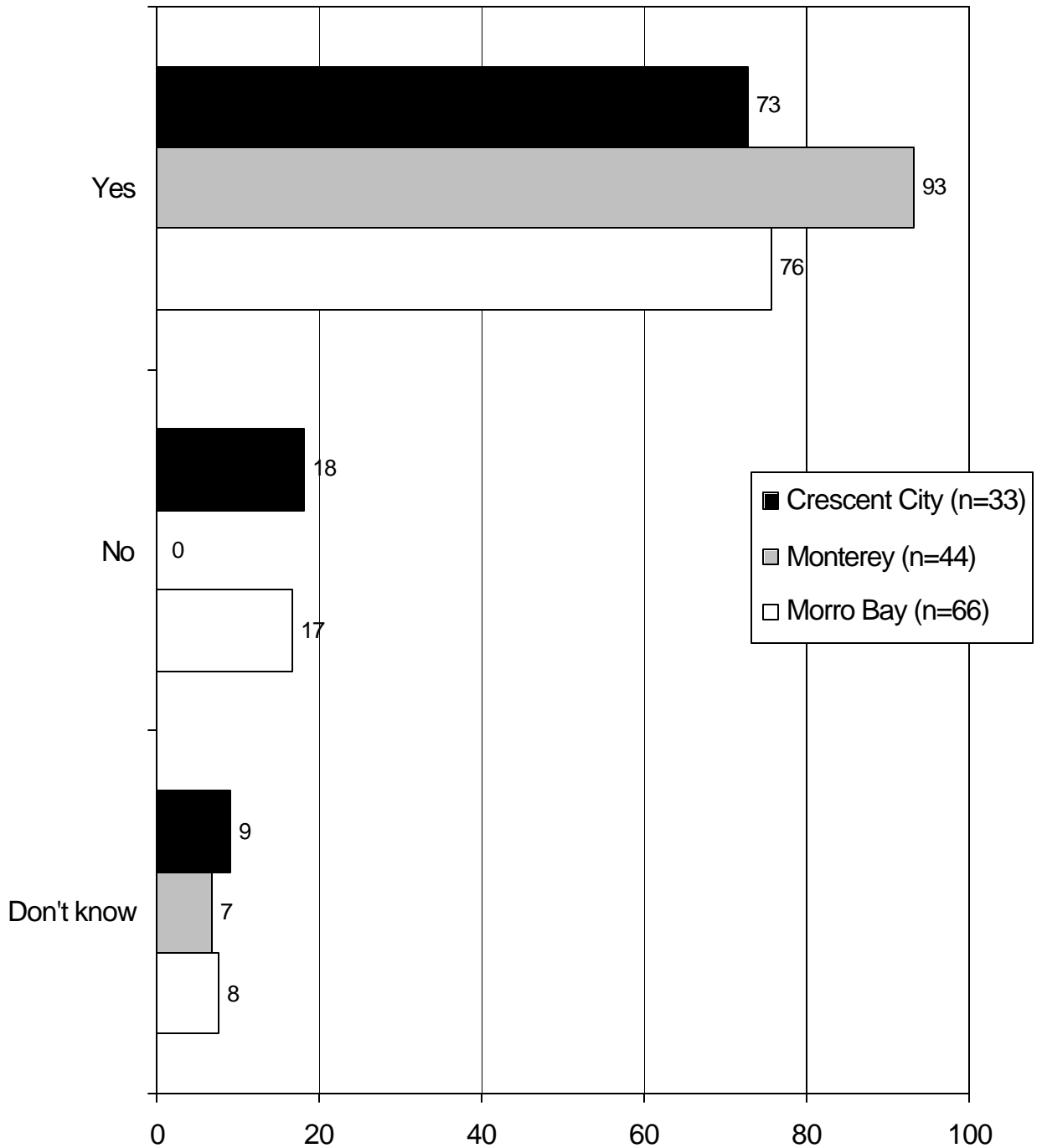
- Overall, 80% of tourism professionals believe that their community government appreciates its cultural resources. Only 12% do not believe that their community government appreciates its cultural resources.
 - Monterey appears to have the greatest confidence in their community government's appreciation 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 in both Crescent City and Morro Bay, 73% and 76%, indicated that their community government appreciates its cultural resources; at the same time, 18% and 17%, respectively, believe that their community government does not appreciate its cultural resources.

- Likewise, 74% of tourism professionals believe that their community government works to preserve its cultural identity; 20% do not believe that their community government works to preserve cultural identity.
 - Again, Monterey has greater confidence in its community 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% indicate that their government works to preserve its cultural identity, while 18% believe their government does not.
 - In Morro Bay, 62% of respondents believe their community government works to preserve its cultural identity, but 26% think their government does not.

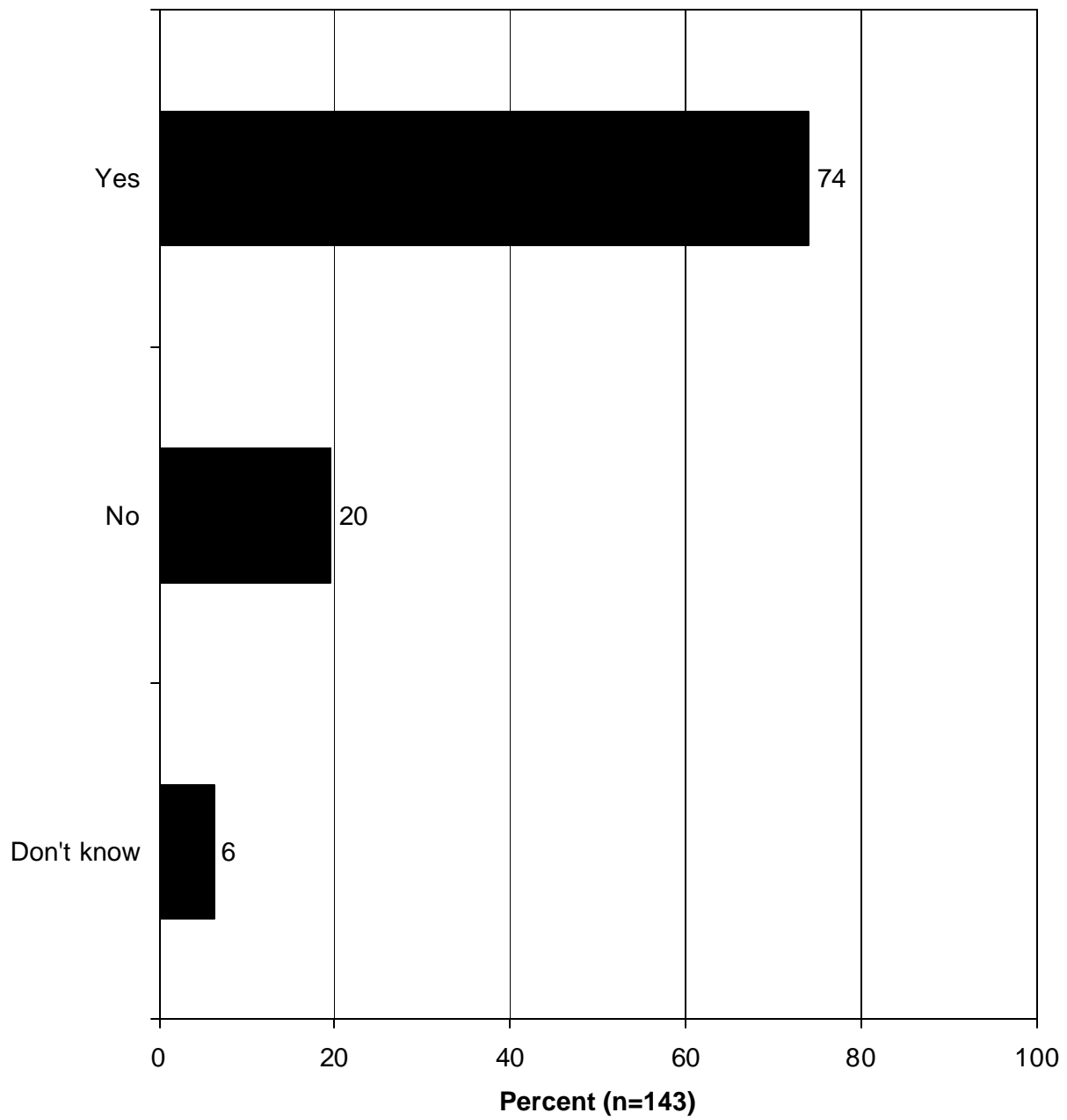
Q30. Do you think your community government appreciates its cultural resources?



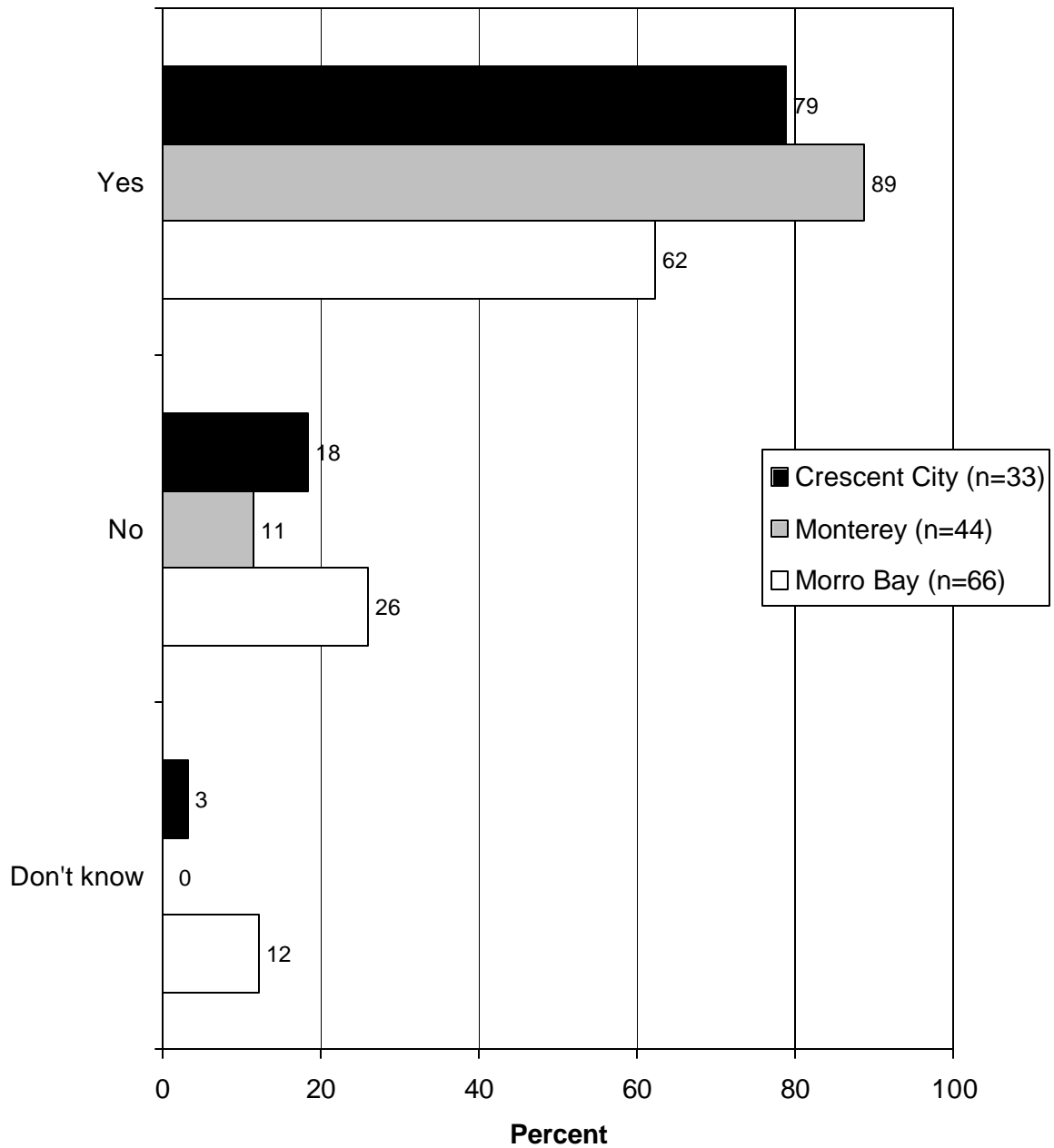
Q30. Do you think your community government appreciates its cultural resources?



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



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

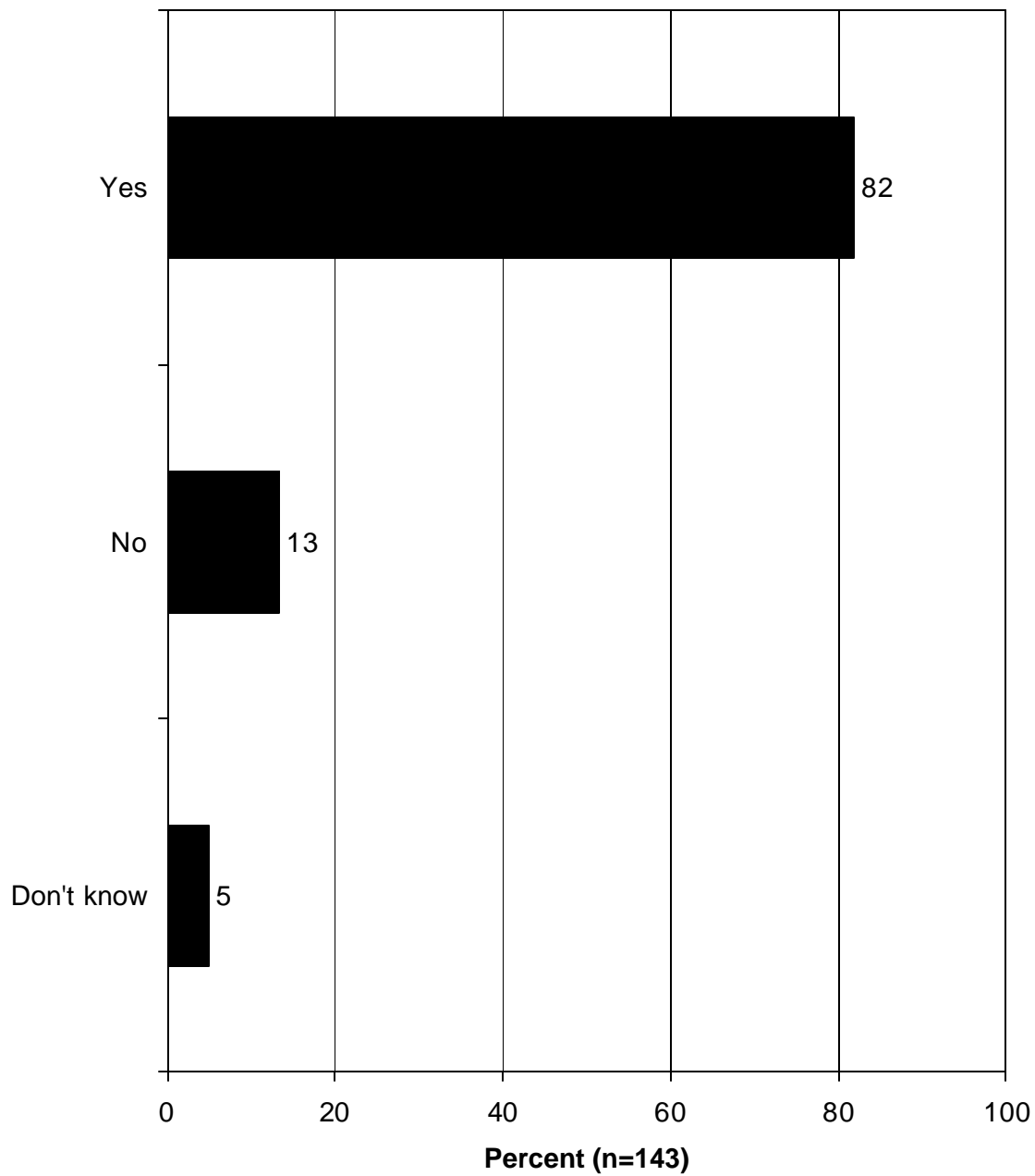


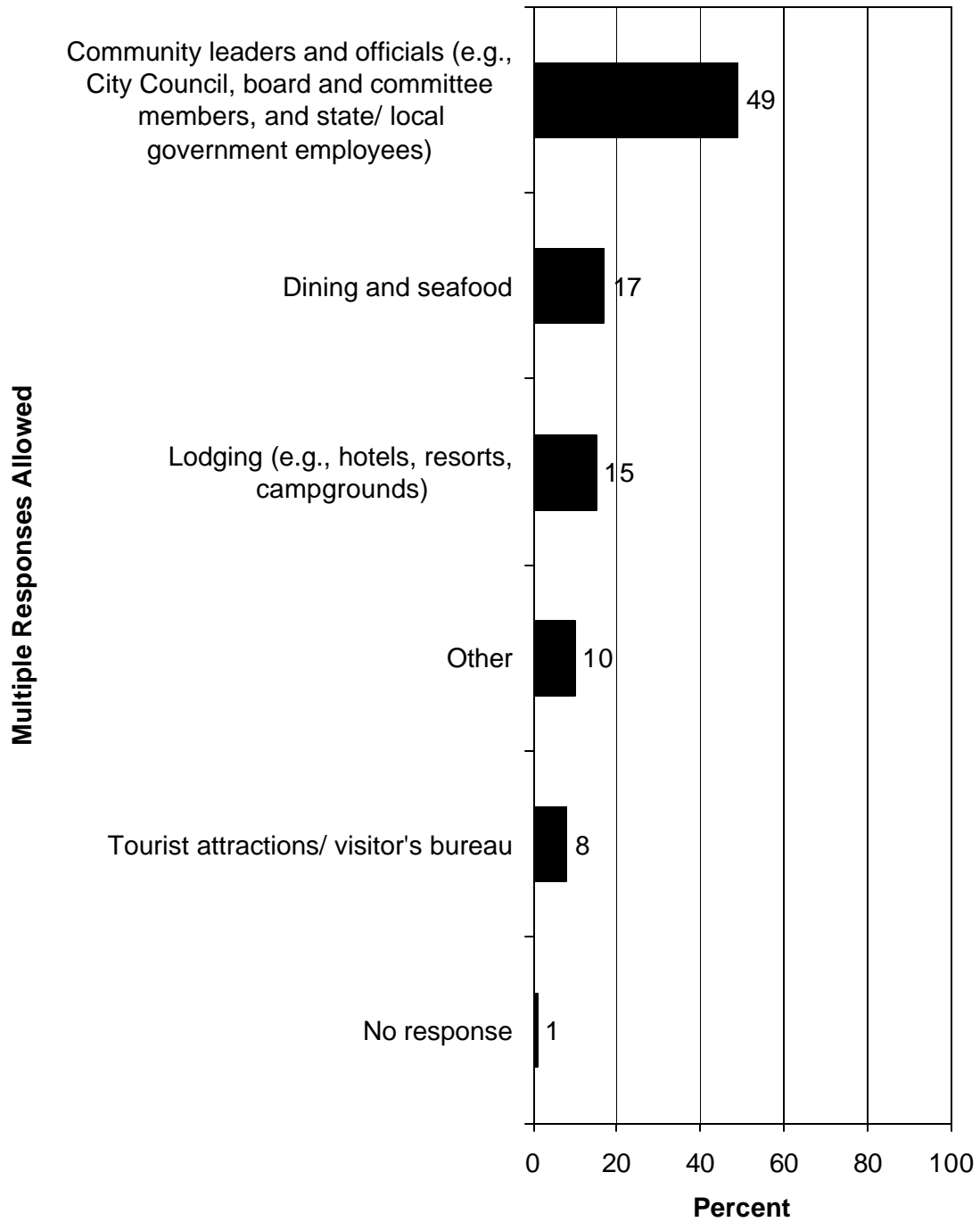
ORGANIZATIONAL INFORMATION

- A vast majority, 82%, of all tourism professionals surveyed belong to an organization that works to attract business to the local community.
 - A graph shows the aspects of tourism on which the organizations focused.

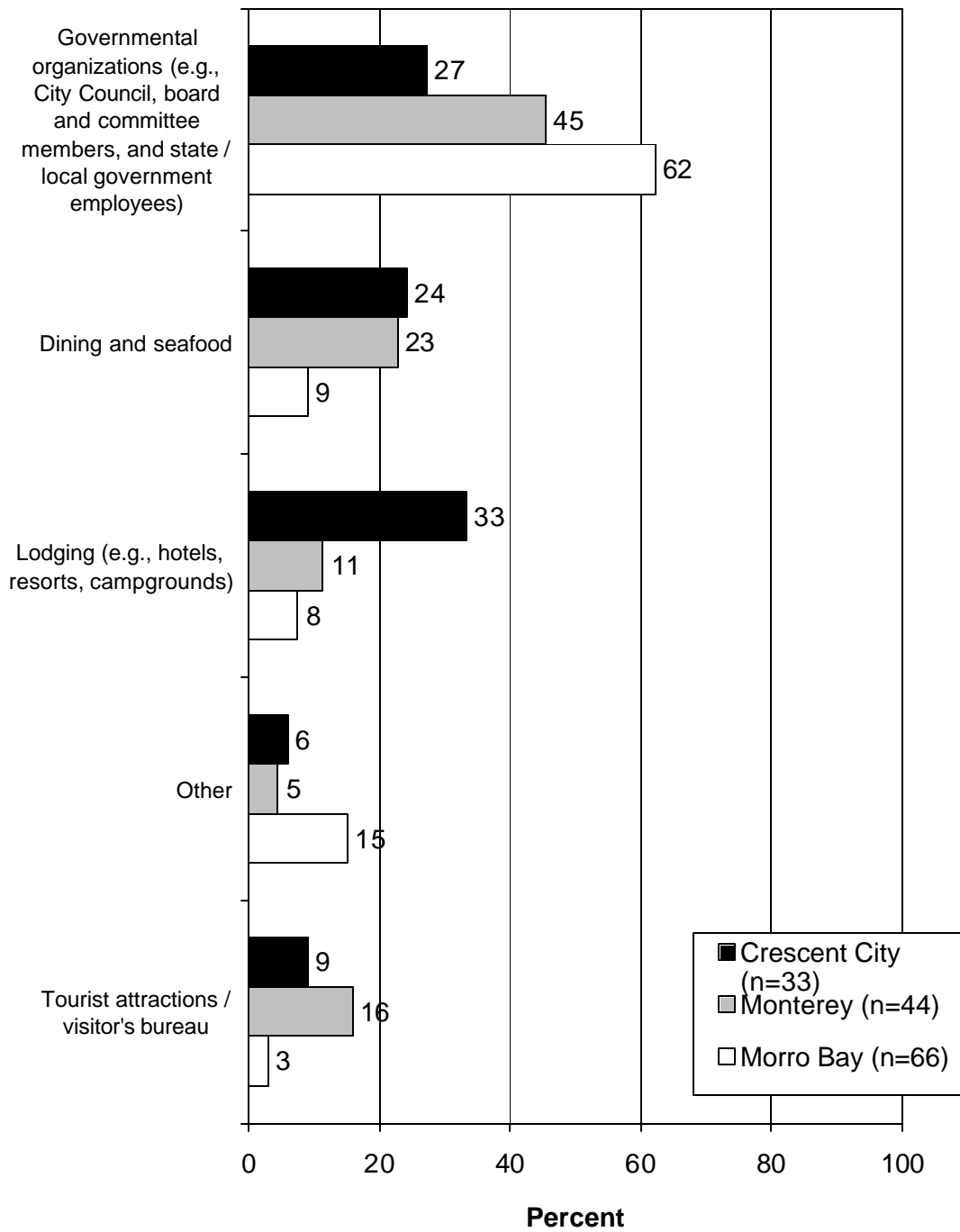
- The distribution between community leaders and tourism professionals was balanced to ensure representation of both civic and business professionals: 49% of those interviewed were identified as community leaders, city officials, community directors; the remaining respondents were categorized as restaurateurs,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

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.



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:

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