

Lower Cost Coastal Accommodation Analysis

Presented to
CALIFORNIA COASTAL COMMISSION

by



Research by **SUSTINERE**

1. Maximum Daily Rate for Lower Cost Accommodations

- Calculated higher of two data points:
 - \$100 per night, and
 - 75% of the 2015 California Avg. Daily Rate (ADR)
- Summer: \$123 per night
- All Year: \$112 per night

2015 California ADR Time Period	ADR (1)	75% * ADR	Max. Daily Rate for Lower-Cost Accommodations (2)
All Year	\$150.03	\$112.52	\$112.52
July	\$164.25	\$123.19	\$123.19
August	\$163.76	\$122.82	\$122.82

Notes:

(1) Data from STR 2015 California Trend Report

(2) The higher of \$100 per night or 75% of the 2015 California ADR

2. Database of Existing Lower Cost Accommodations

- Approx. 54,298 hotel/motel rooms in the Coastal Zone and 1-mile from shoreline buffer
- 7,486 rooms, or approx. 14 percent, fall below the \$112 max. daily rate

2. Number of Hotel/Motel Rooms Below Max. Daily Rate (\$112)

County	Total Coastal Rooms	Number of Lower Cost Coastal Rooms	Percent of Total by County
Del Norte	706	255	36%
Humboldt	1,346	613	46%
Los Angeles	1,843	333	18%
Marin	139	113	73%
Mendocino	1,052	257	24%
Monterey	2,396	57	2%
Orange	6,841	370	5%
San Diego	29,527	4,389	15%
San Francisco	164	54	33%
San Luis Obispo	2,990	164	5%
San Mateo	716	50	7%
Santa Barbara	2,712	70	3%
Santa Cruz	1,791	408	23%
Sonoma	248	26	10%
Ventura	1,811	327	18%
Total	54,298	7,486	14%

Source: Sustinere

2. Database of Existing Lower Cost Accommodations Including RV/Campsites

- Approx. 64,781 units (hotels, motels, and RV/campsites) in the Coastal Zone and 1-mile from shoreline buffer
- 17,148 units, or approx. 26 percent, fall below the \$112 max. daily rate

2. Number of Units Below Max. Daily Rate (\$112) Includes RV/Campsites

County	Total Coastal Units	Number of Lower Cost Coastal Units	Percent of Total by County
Del Norte	1,927	1,476	77%
Humboldt	2,421	1,659	69%
Los Angeles	2,494	774	31%
Marin	429	387	90%
Mendocino	2,291	1,438	63%
Monterey	2,996	639	21%
Orange	7,727	840	11%
San Diego	30,452	5,313	17%
San Francisco	164	54	33%
San Luis Obispo	4,724	1,895	40%
San Mateo	987	320	32%
Santa Barbara	3,184	528	17%
Santa Cruz	2,176	789	36%
Sonoma	814	531	65%
Ventura	1,995	505	25%
Total	64,781	17,148	26%

Source: Sustinere

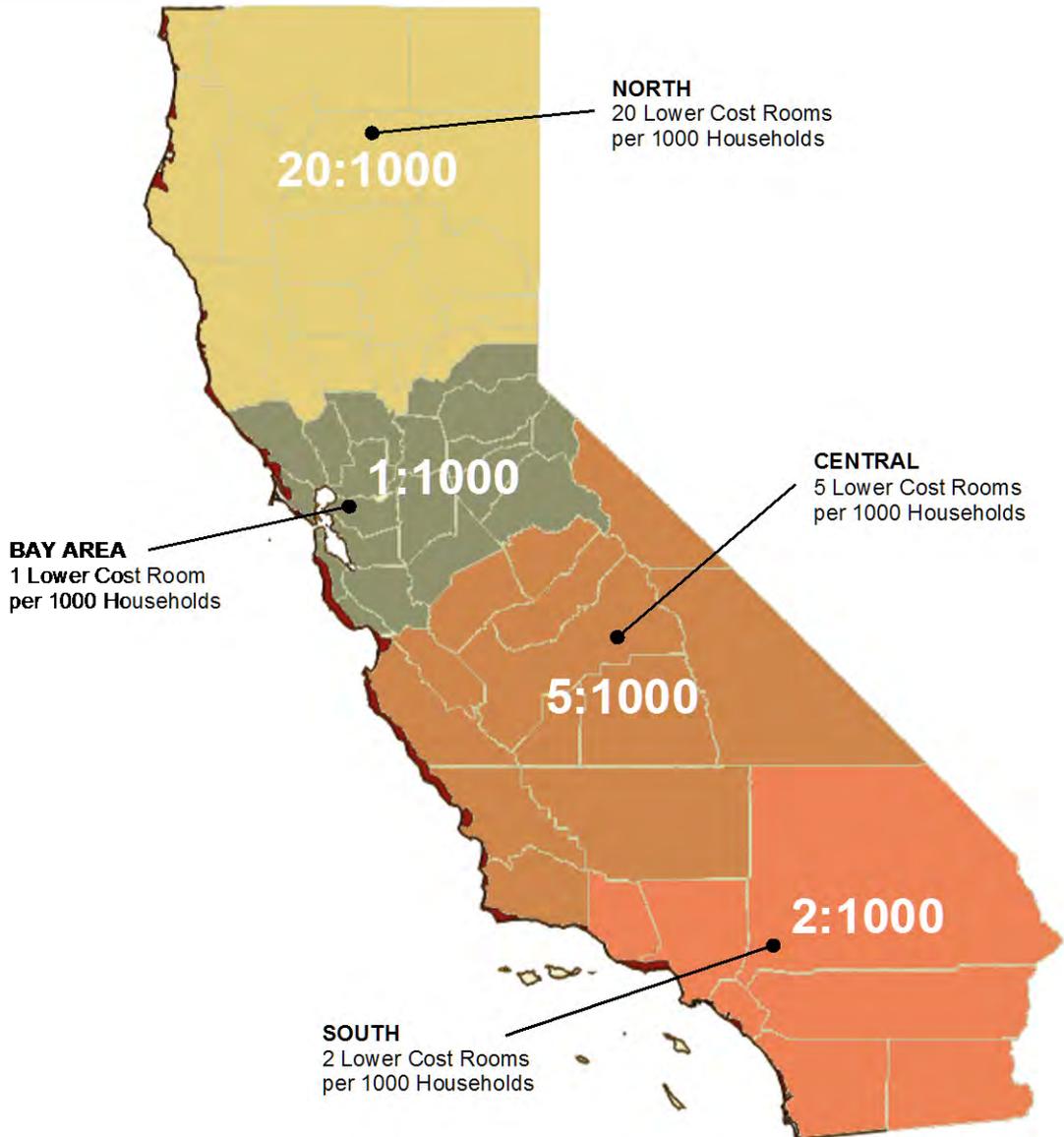
3 Distribution Analysis

- Analyzed availability of lower-cost accommodations relative to household population below 80% AMI within 150 miles of the coastal zone
- Lower availability per household population in Bay Area and Central California
- Different results if include RVs / Campsites

3. Lower Cost Accommodations (Hotel/Motel Rooms) per 1,000 Households Regionally



3. Lower Cost Accommodations (Units: Hotel, Motel, or RV/Campsites) per 1,000 Households Regionally



Lower Cost Coastal Accommodation Analysis

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Coastal Conservancy Statewide Survey

- Report on Results -

April 24, 2017



Opinion Research
on Public Policy

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Coastal Conservancy – Statewide Survey

Report on results

From Thursday, March 23 to Wednesday, March 29, 2017, Probolsky Research conducted a telephone survey of California residents.

A total of 1200 residents were surveyed. A survey of this size yields a margin of error of +/- 3.2% with a confidence level of 95%. Interviews were conducted with residents on both landline and mobile phones (30%) and were offered in English and Spanish languages.

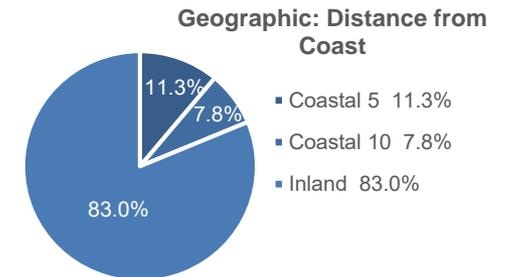
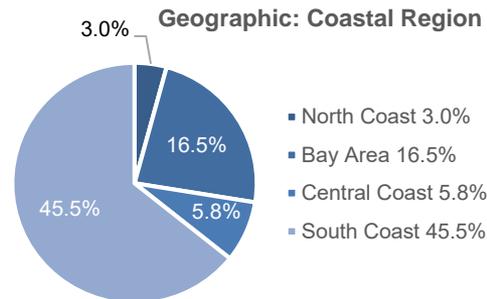
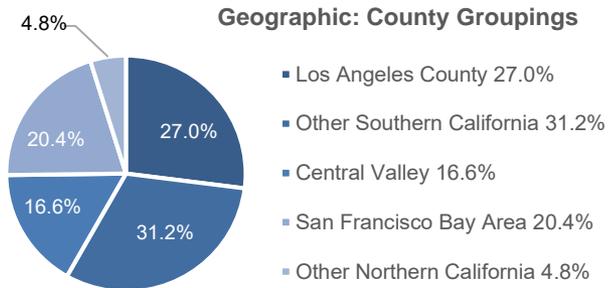
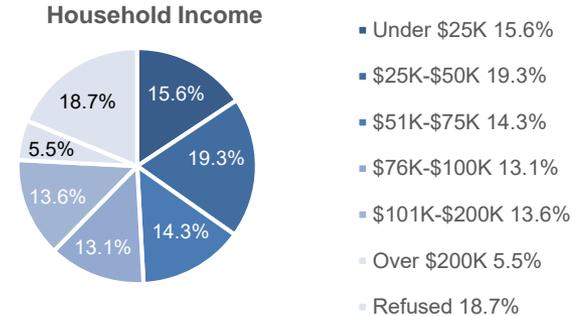
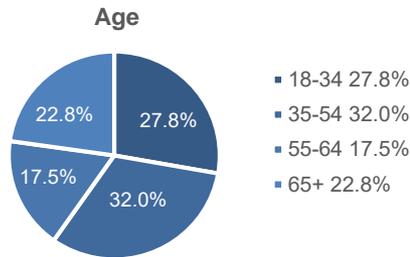
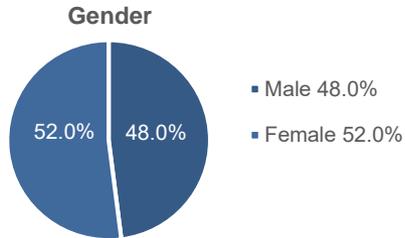
Probolsky Research specializes in in opinion research on behalf of business, government, non-profit and special interest clients.



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Sizes of Demographic/Geographic Categories Snapshot



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Top Issues

Open-ended question



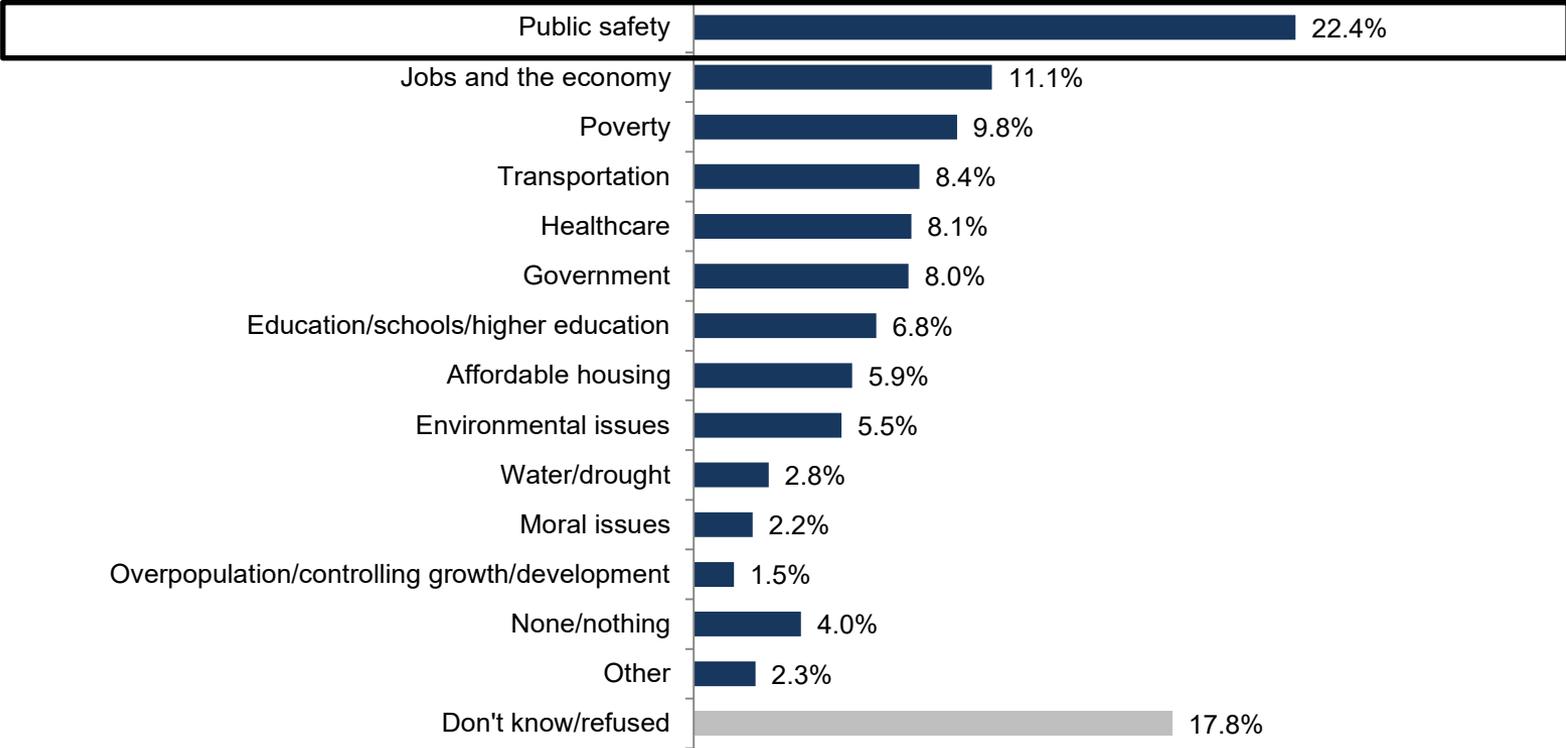
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Public Safety is the Most Important Issue

Among California residents

Question: What is the most important issue facing your community today?



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Overall Coastal Experience

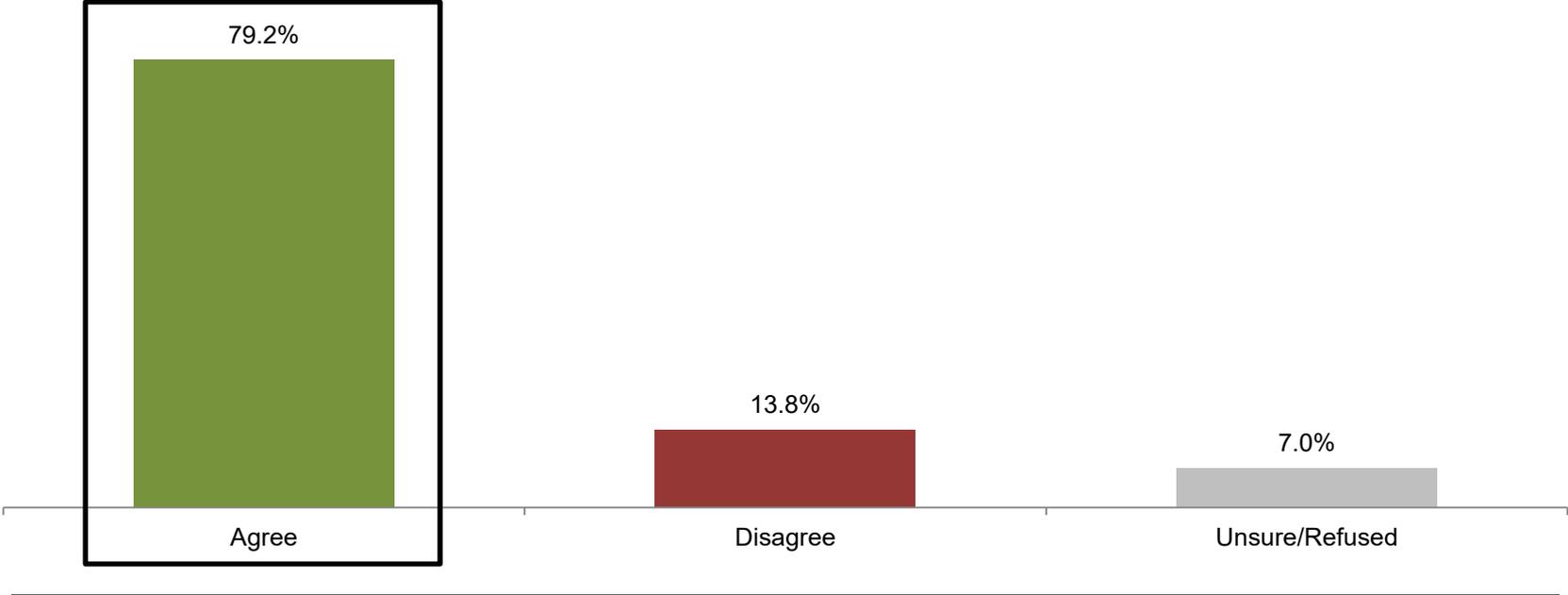


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79.2% of Respondents Say that California Beaches are clean and safe places to visit

Statement: California beaches are clean and safe places to visit.

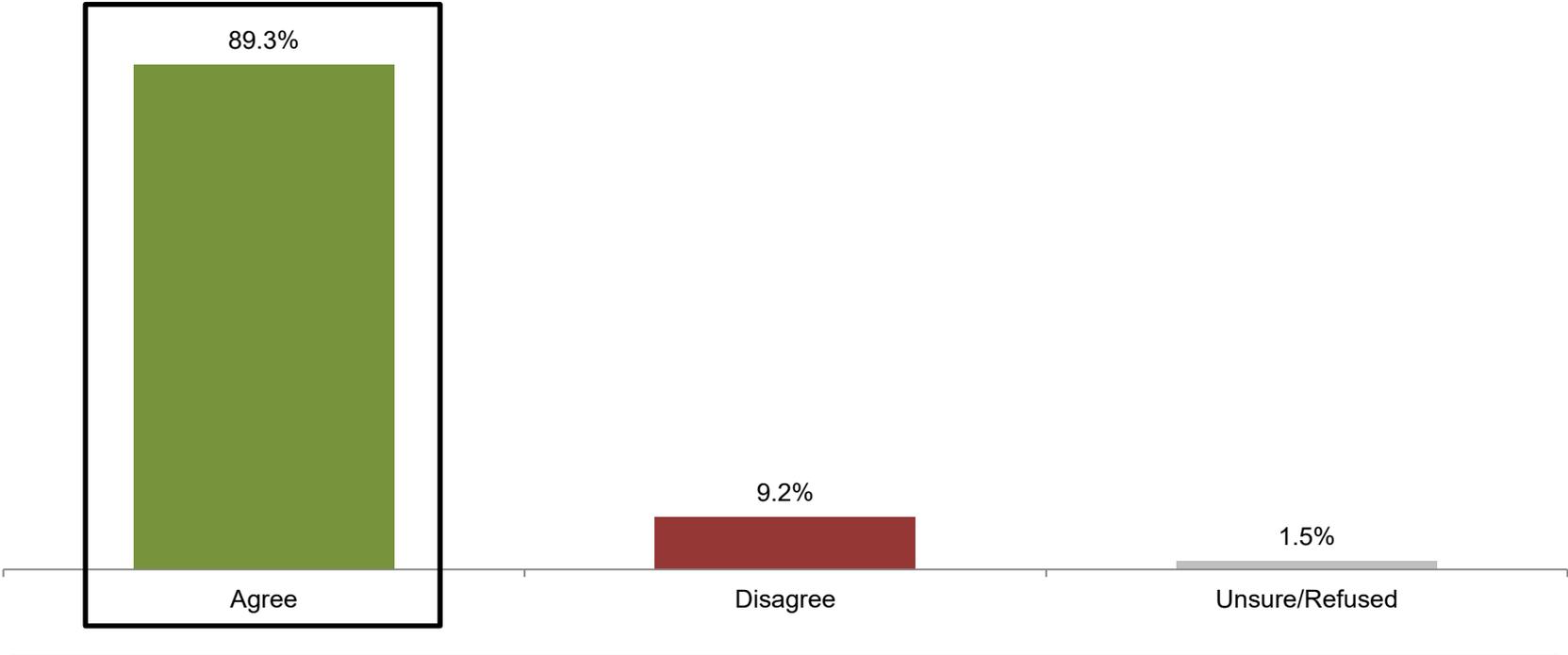


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89.3% of Respondents Agree that the California Coast, including beaches and the ocean, are personally important to them

Statement: The California Coast, including beaches and the ocean are personally important to me.

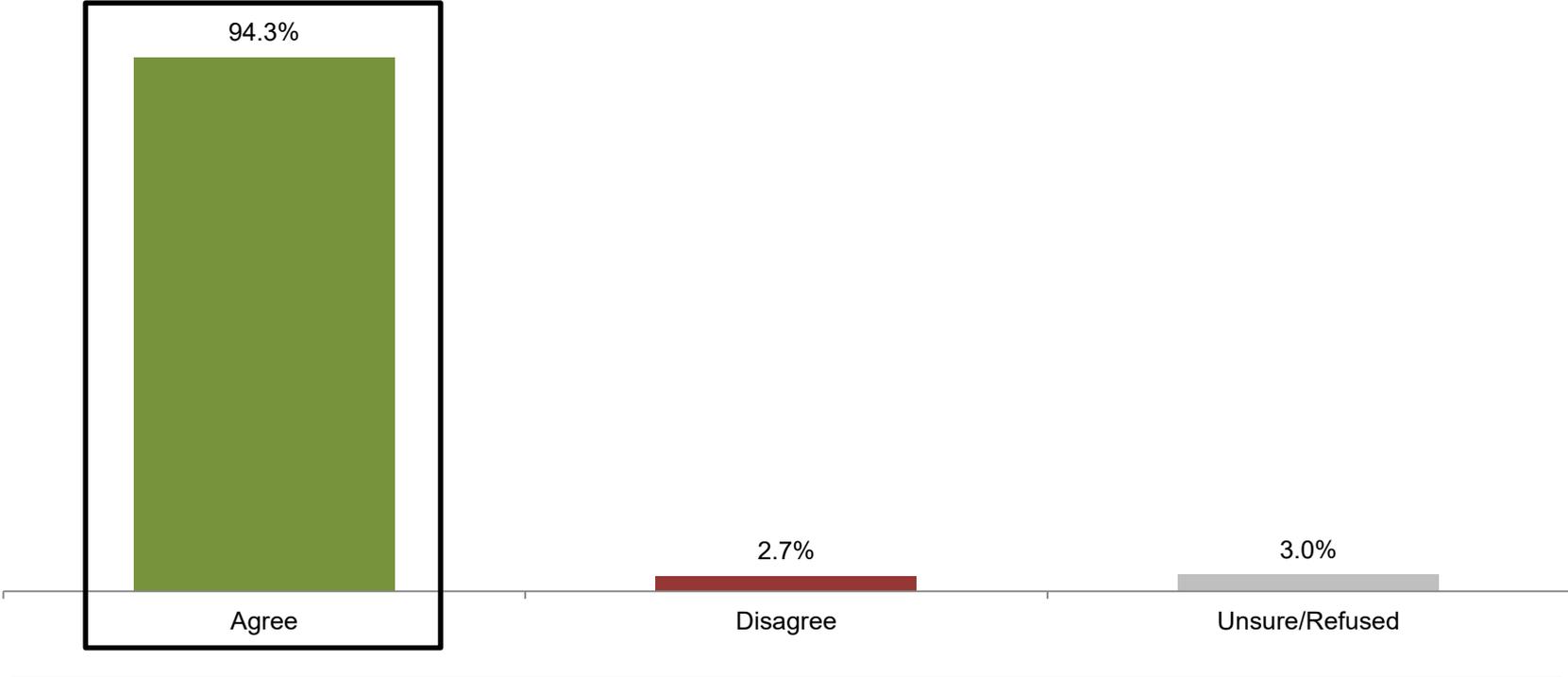


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94.3% Agree that People of All Backgrounds Are welcome at the California coast

Statement: People of all backgrounds are welcome at the California Coast.

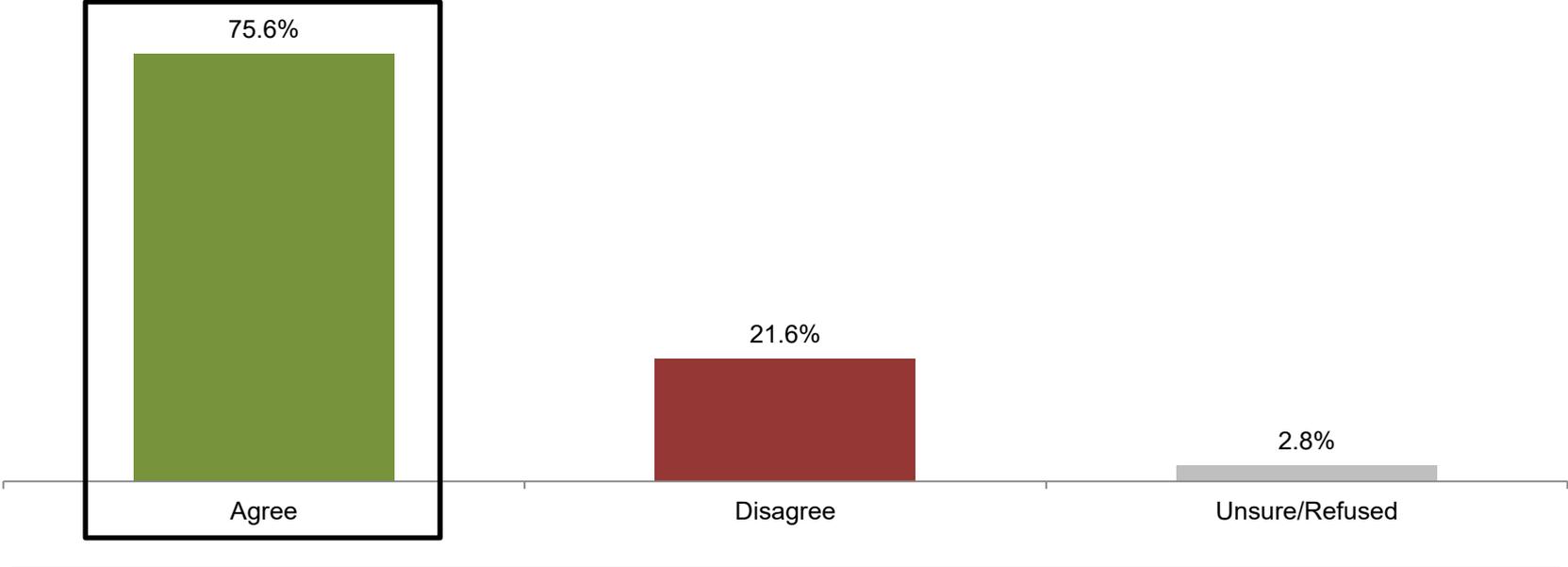


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75.6% Agree that Even When They are Not Visiting the California coast, they feel a strong connection to it

Statement: Even when I am not visiting the California Coast, I feel a strong connection to it.



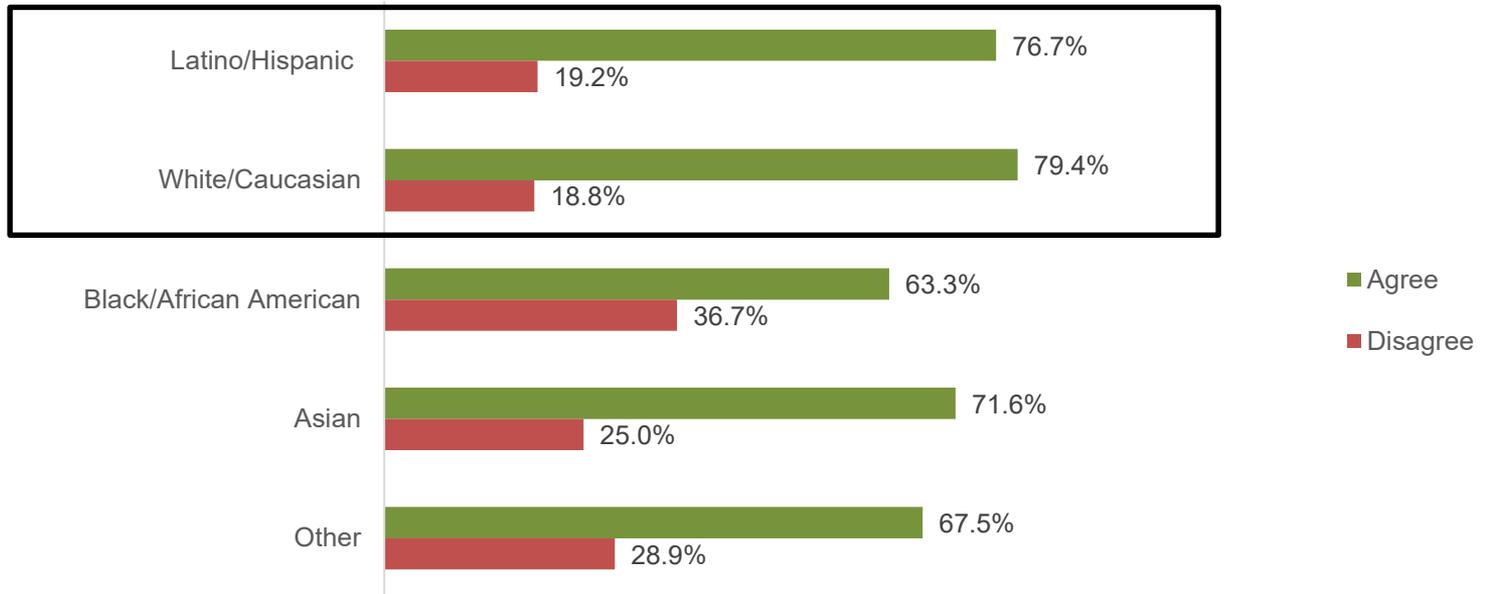
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Latino/Hispanic and White/Caucasian

Respondents feel a strong connection to the CA coast, even when they are not visiting

Statement: Even when I am not visiting the California Coast, I feel a strong connection to it.

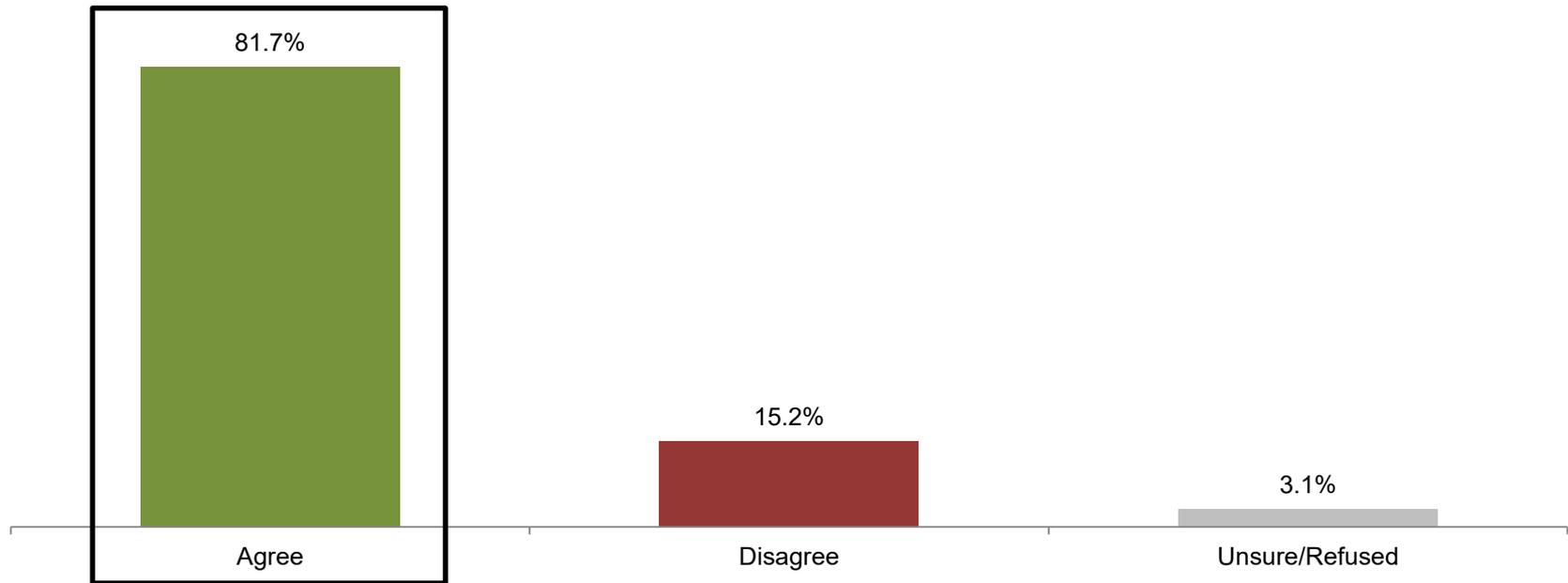


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81.7% of Respondents Say They are Familiar with California's beaches and their amenities

Statement: I am familiar with California's beaches and their amenities.



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Childhood Memories of the CA Coast

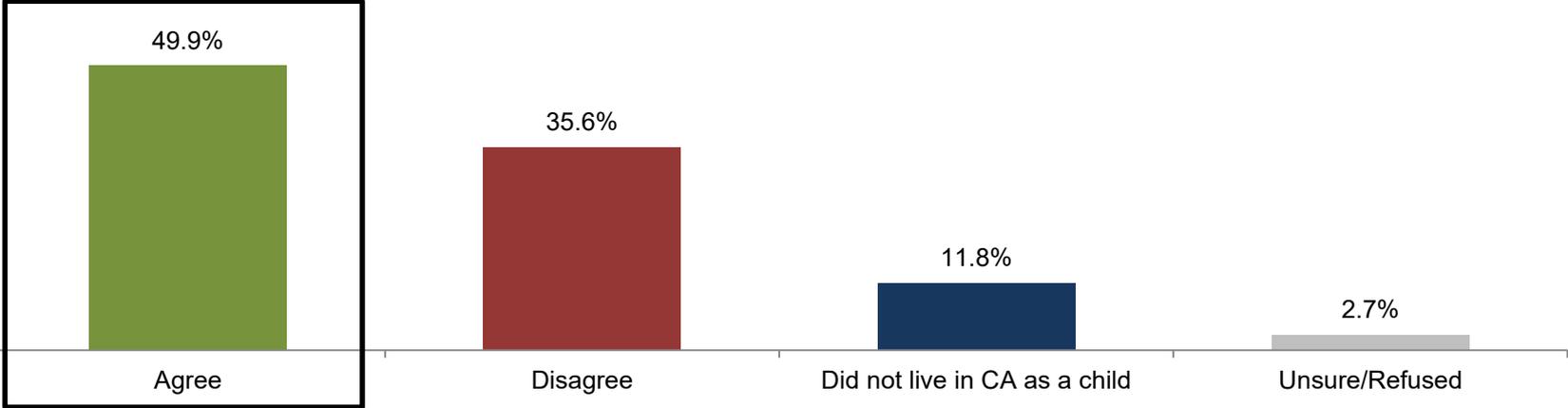


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49.9% of Respondents Say They Have Fond memories of visiting the CA coast on school field trips when they were kids

Statement: I have fond memories of visiting the California Coast on school field trips when I was a kid.

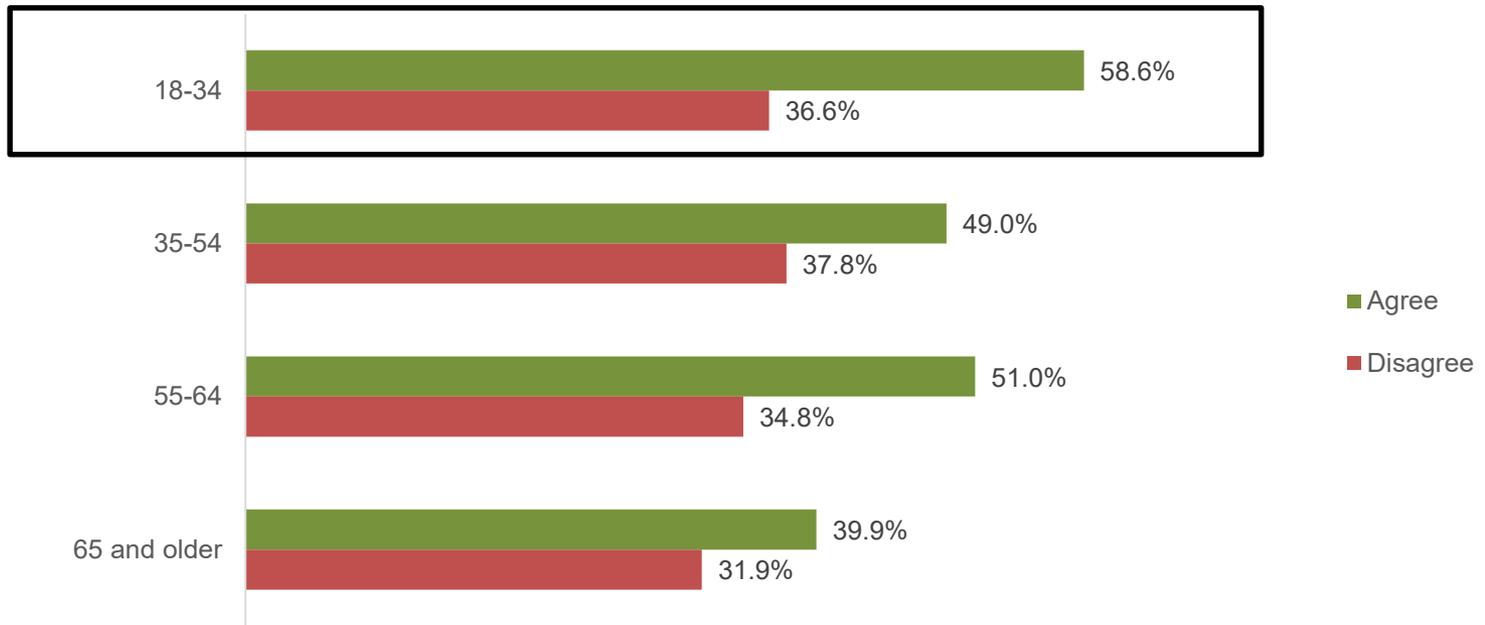


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Younger Respondents Agree the Most that They have fond memories of visiting the CA coast on school field trips when they were kids

Statement: I have fond memories of visiting the California Coast on school field trips when I was a kid.



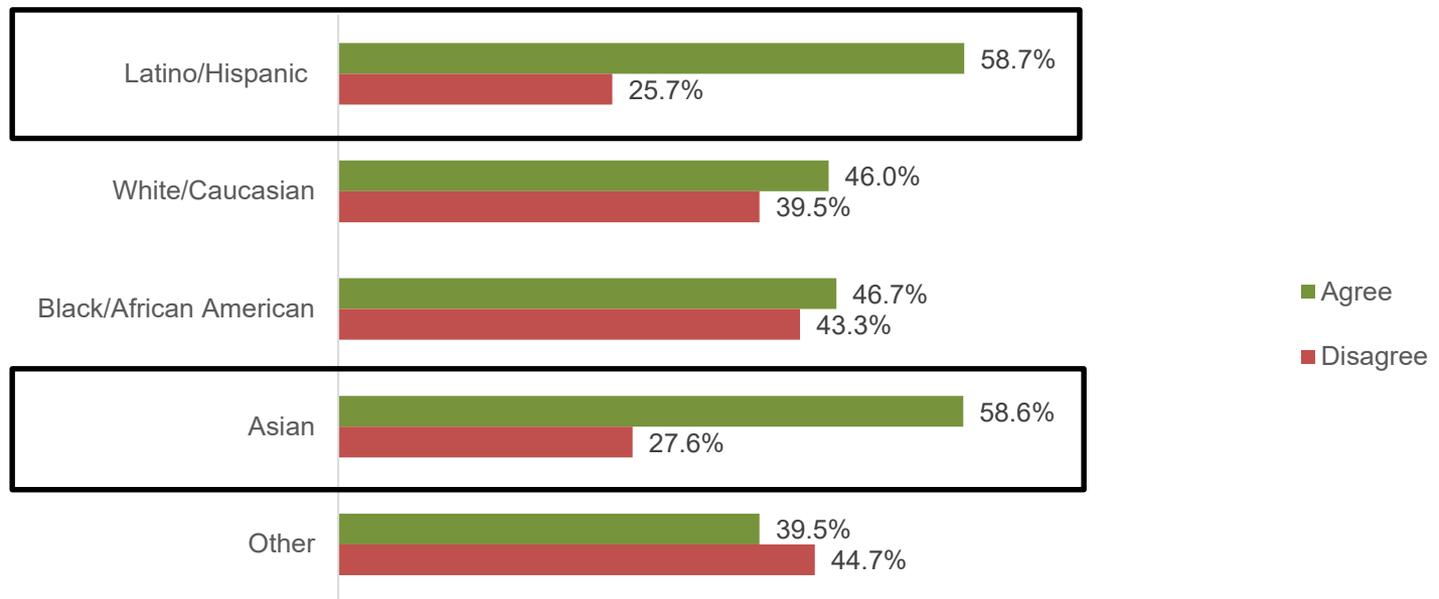
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Latino/Hispanic and Asian Respondents

Agree almost equally that they have fond memories of visiting the CA coast when they were kids

Statement: I have fond memories of visiting the California Coast on school field trips when I was a kid.



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How Often do California Residents Visit the Coast?

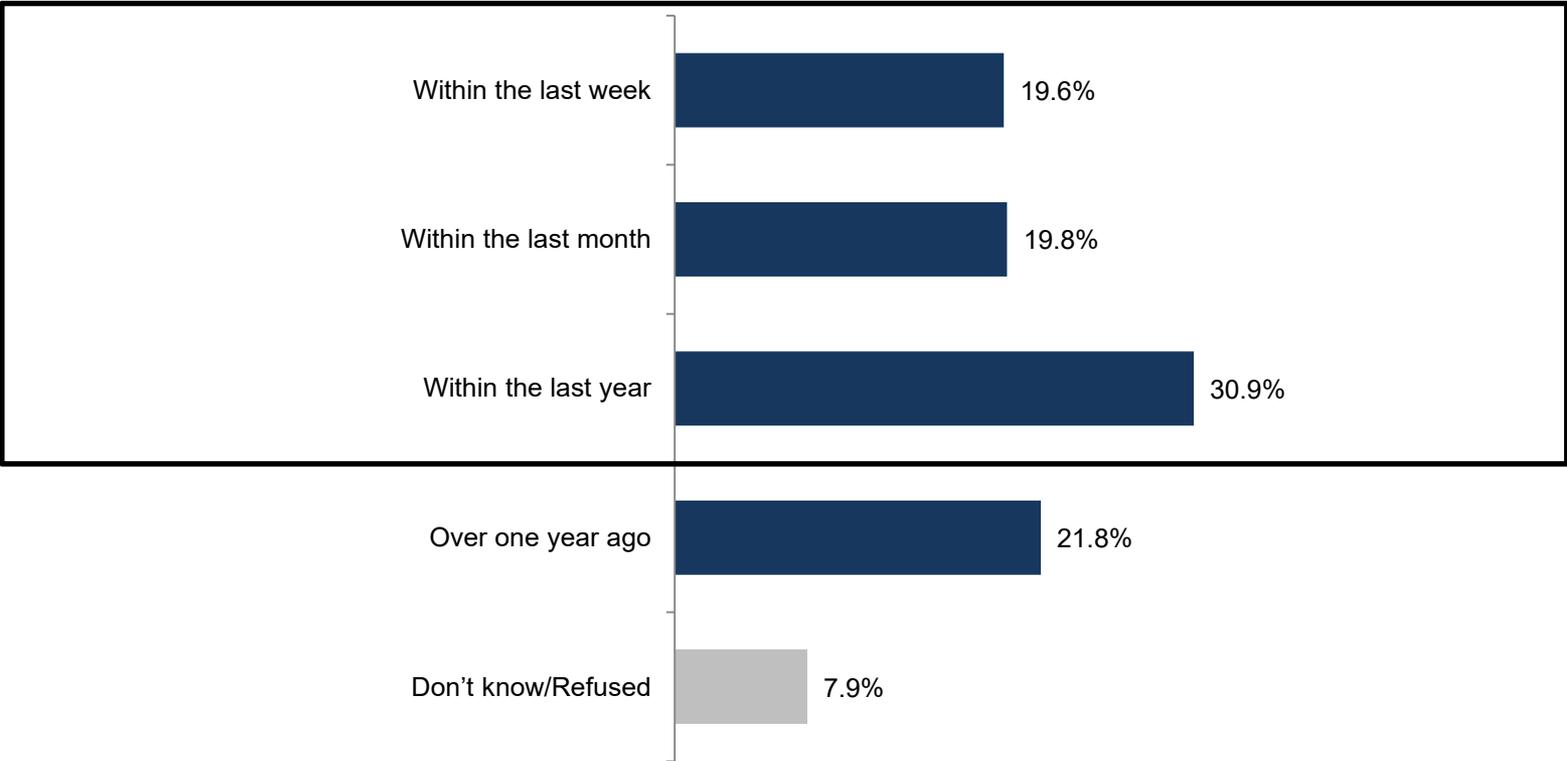


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Over 70% of Respondents Say They Visited The coast within the last year

Question: When was the last time you went to the coast in California?

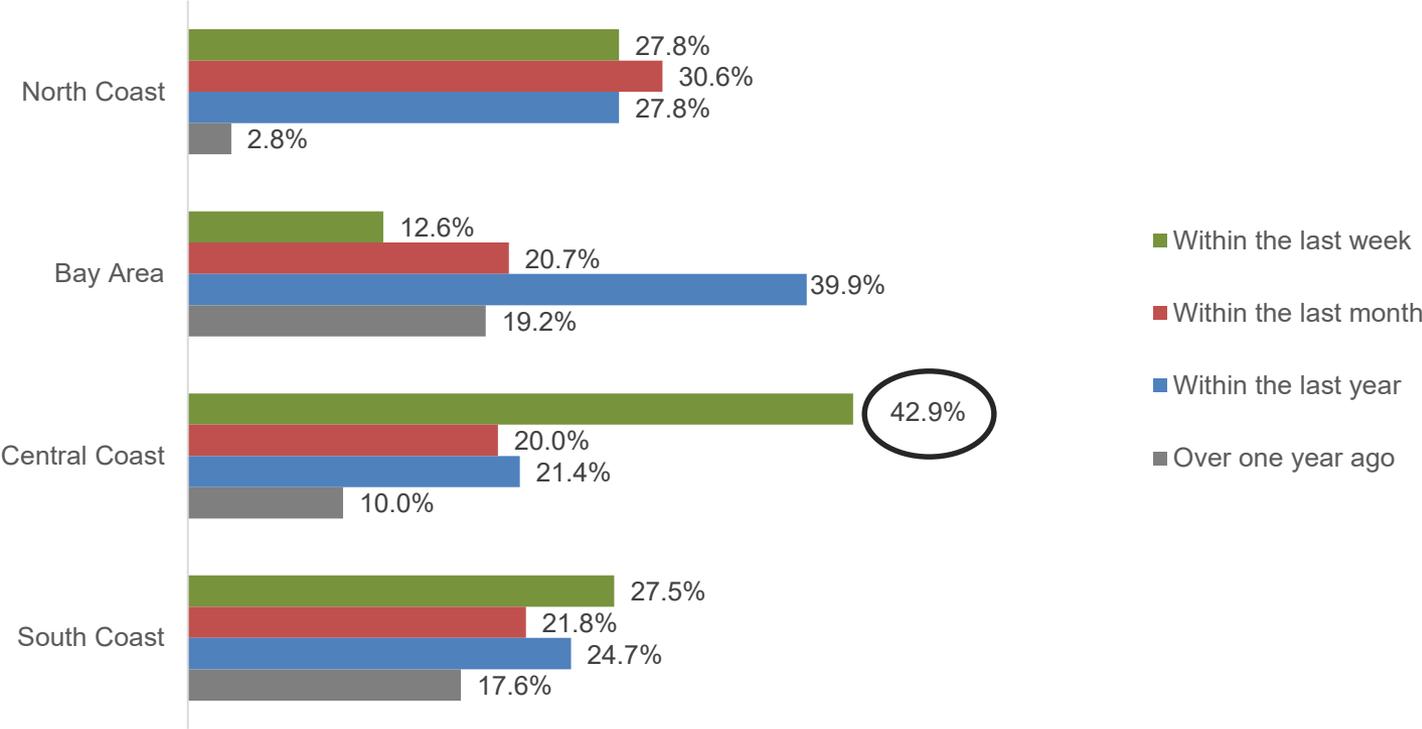


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42.9% of Central Coast Respondents Report that the last time they've been to the coast was within the last week

Question: When was the last time you went to the coast in California?



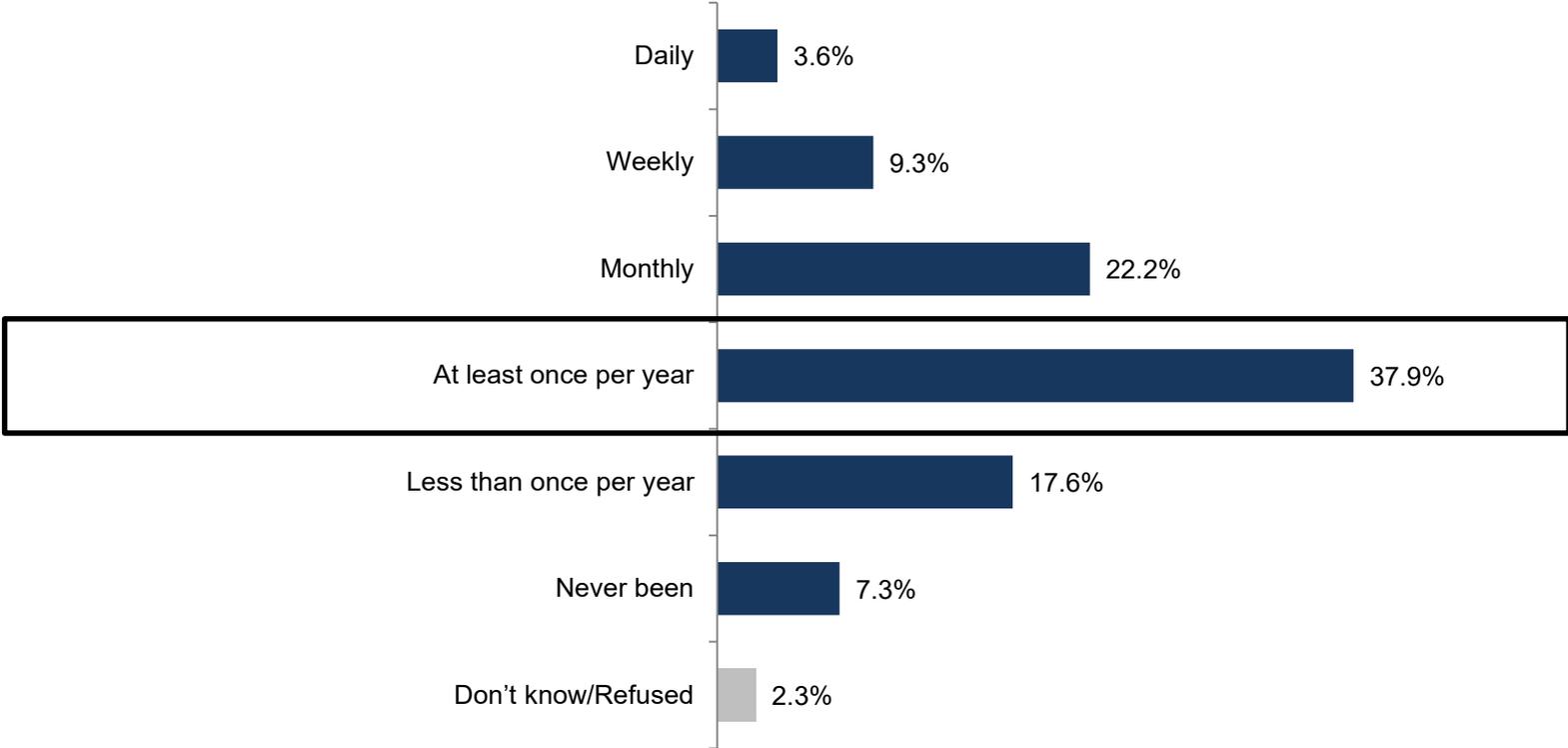
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More Respondents Go to the Coast

“At least once per year” (37.9%) than any other frequency

Question: How often do you go the to the coast in California?



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Traveling to the CA Coast

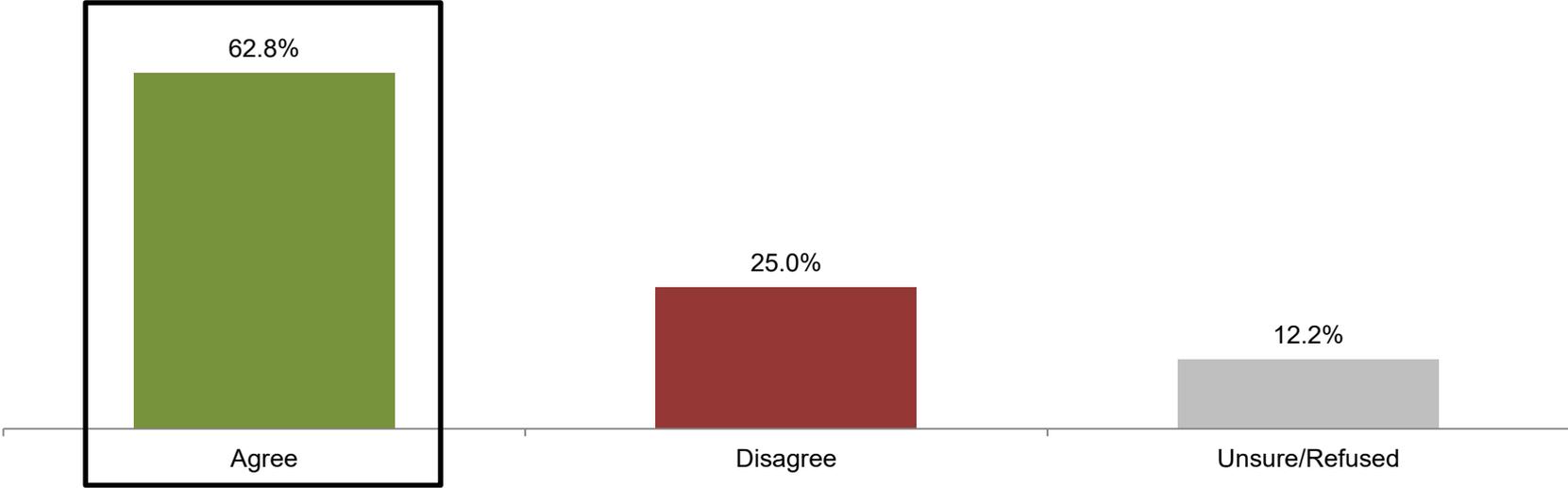


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62.8% of Respondents Agree that Transportation to the CA coast is convenient and affordable

Statement: Transportation to the California Coast is convenient and affordable.

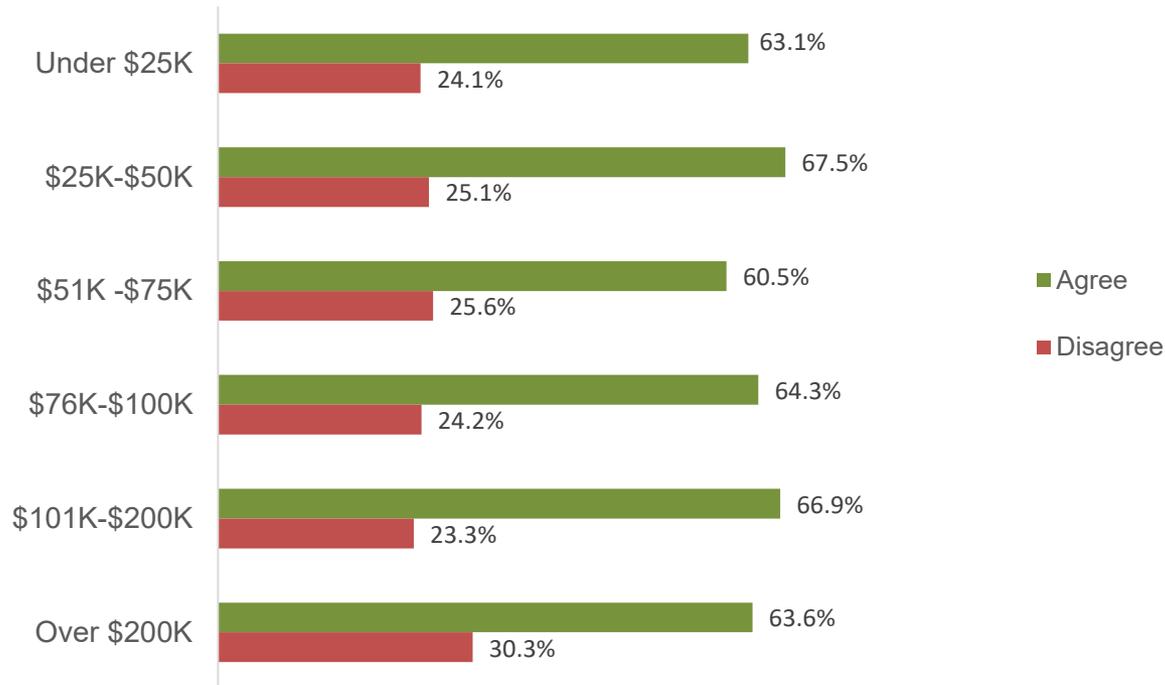


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Respondents of All Income Brackets Agree That transportation to the CA coast is convenient and affordable

Statement: Transportation to the California Coast is convenient and affordable.



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Arriving to the CA Coast (Parking)

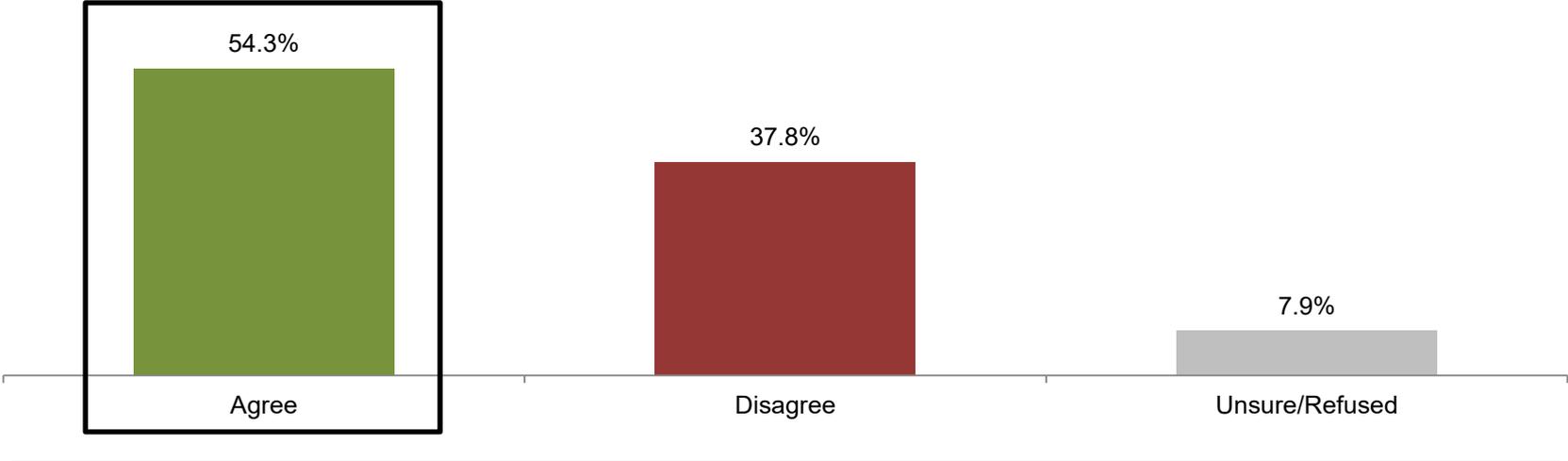


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54.3% of Respondents Agree that Parking Is convenient and generally available at the California coast

Statement: Parking is convenient and generally available at the California Coast.

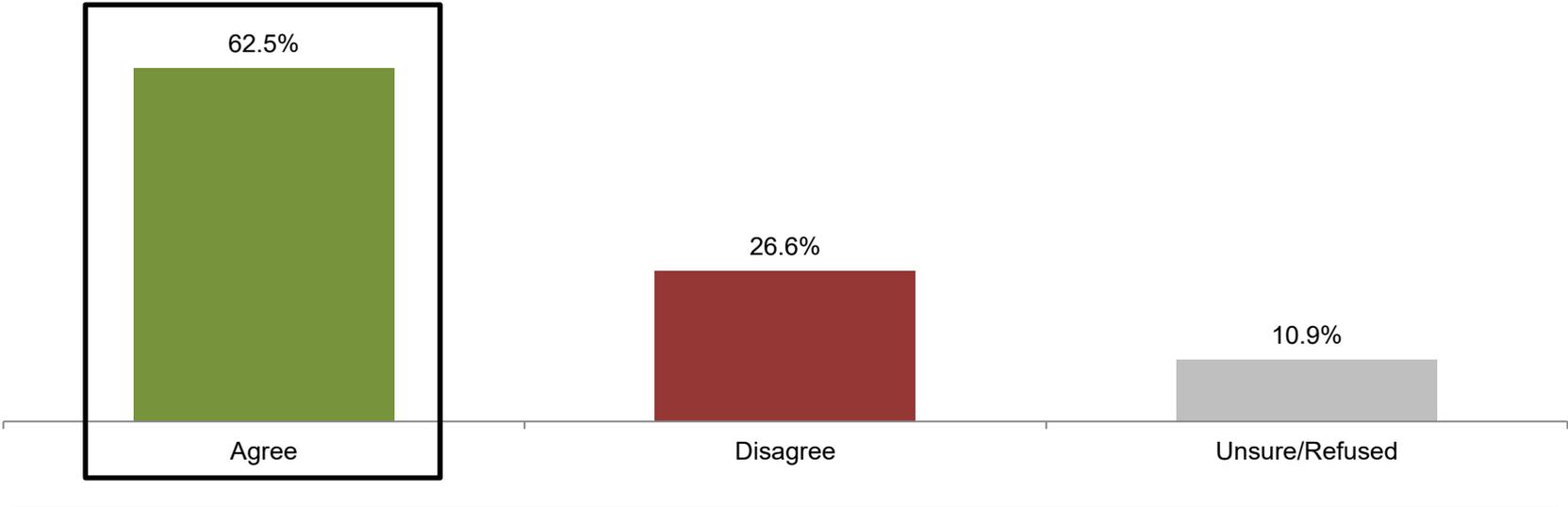


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62.5% of Respondents Agree that Parking Is affordable at the California coast

Statement: Parking is affordable at the California Coast.



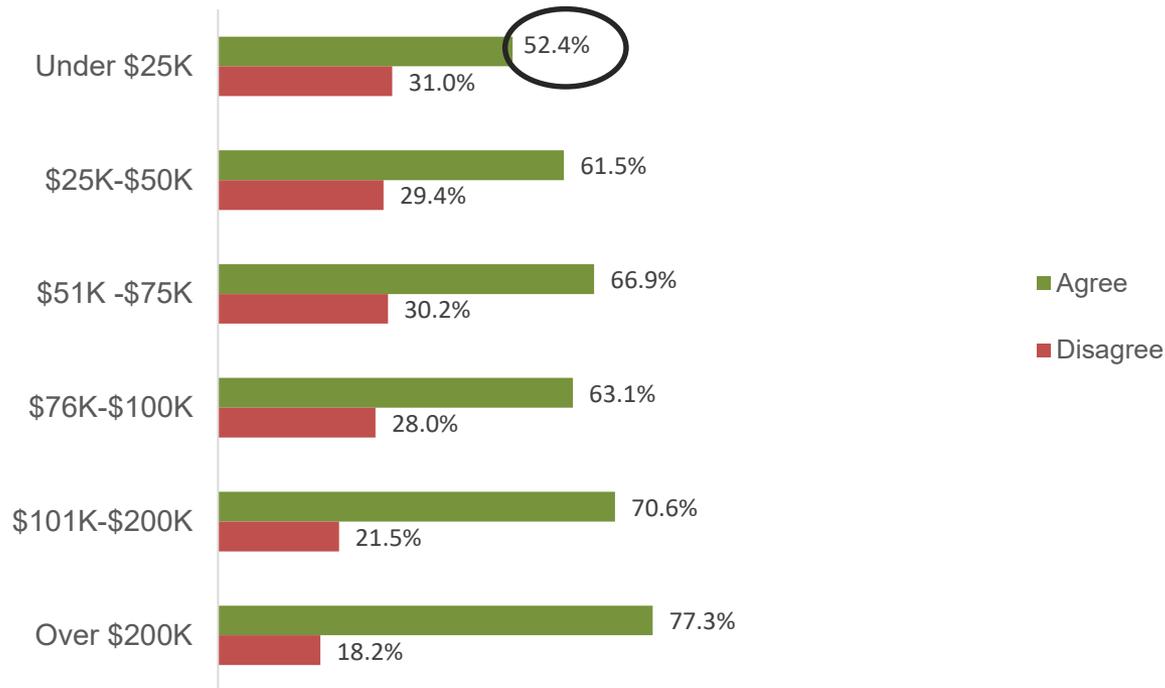
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A Majority Among All Income Brackets

Agree that parking is affordable at the CA coast

Statement: Parking is affordable at the California Coast.



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Experience at the Coast

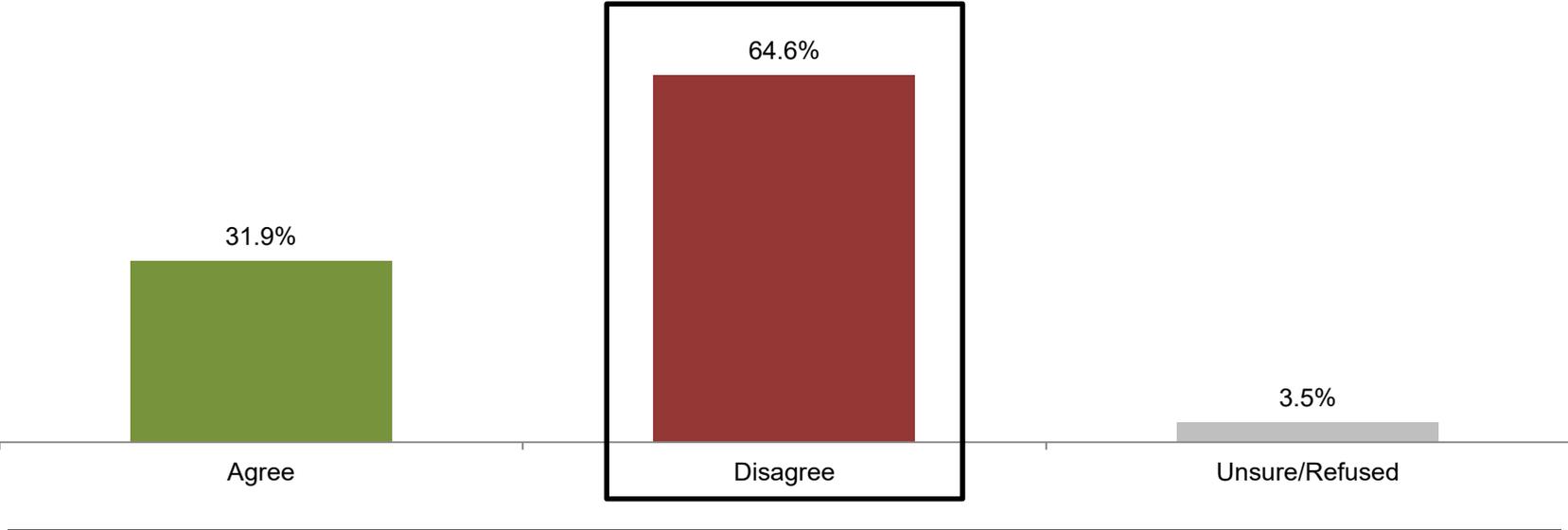


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64.6% Do Not Wish There were More Things to do at the CA coast when they get there

Statement: I wish there were more things to do at the California Coast when I get there.

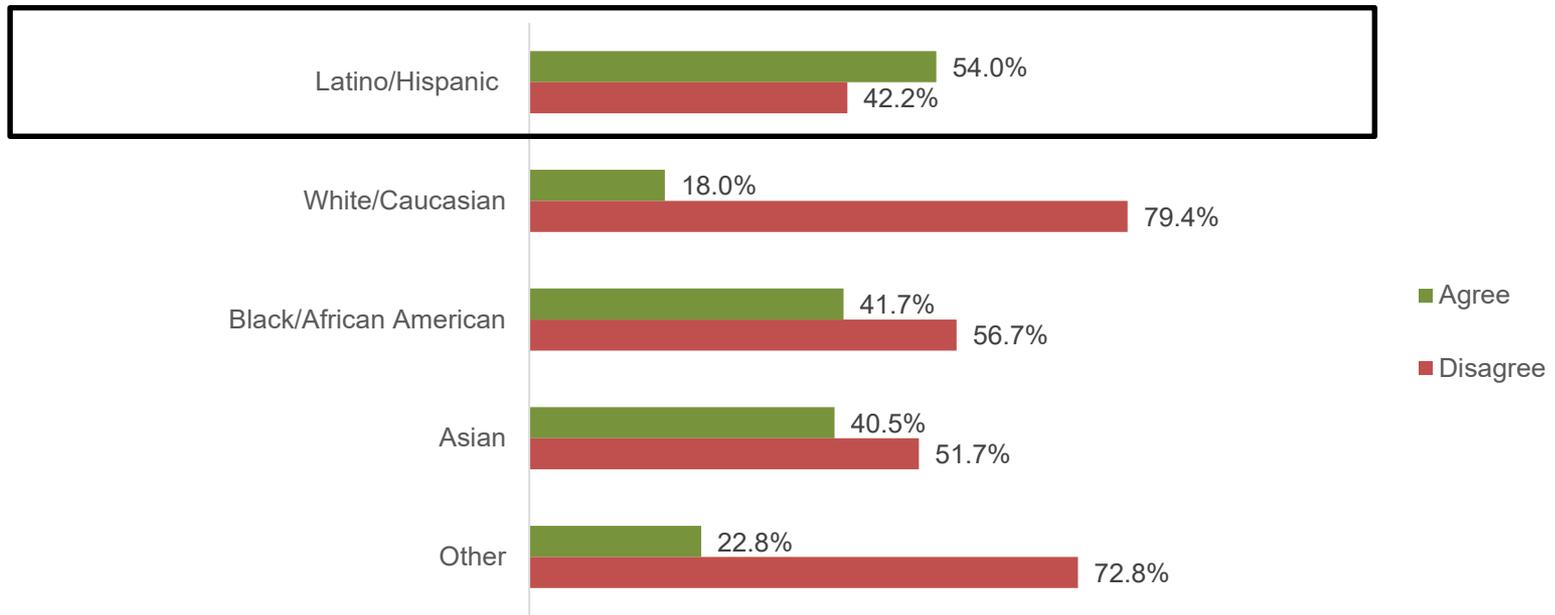


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A Majority of Latino/Hispanic Residents Wish there were more things to do at the CA coast

Statement: I wish there were more things to do at the California Coast when I get there.

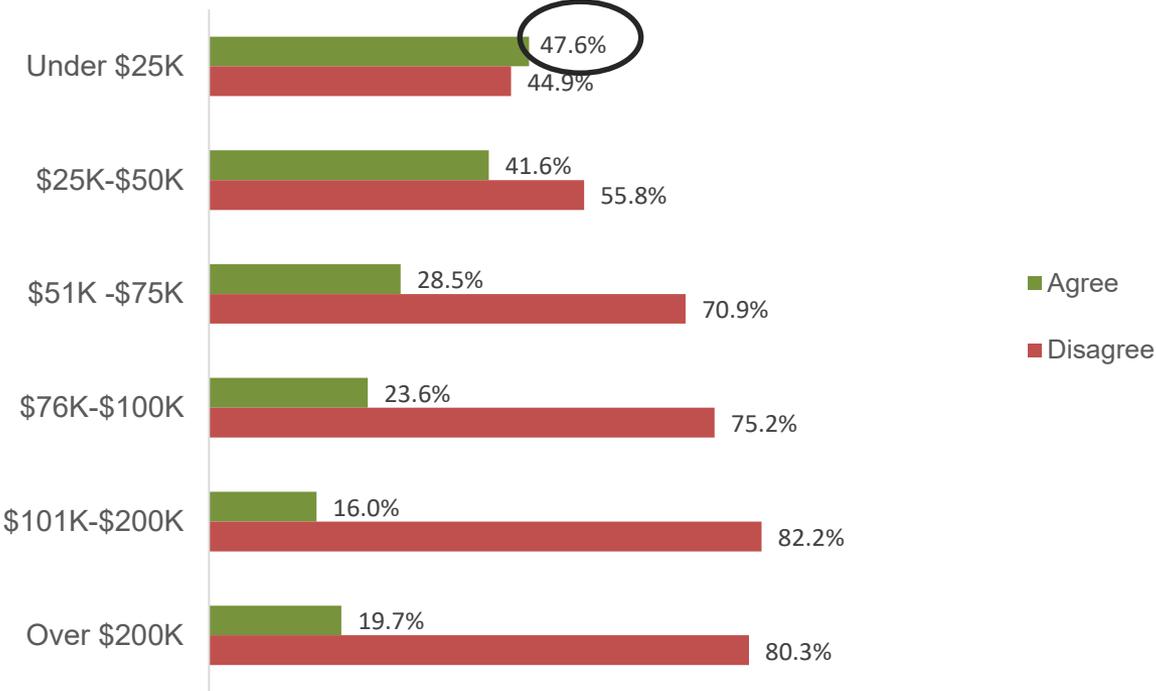


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47.6% of Respondents with an Income Under \$25K wish there were more things to do at the CA coast when they get there

Statement: I wish there were more things to do at the California Coast when I get there.



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Staying Overnight at the Coast

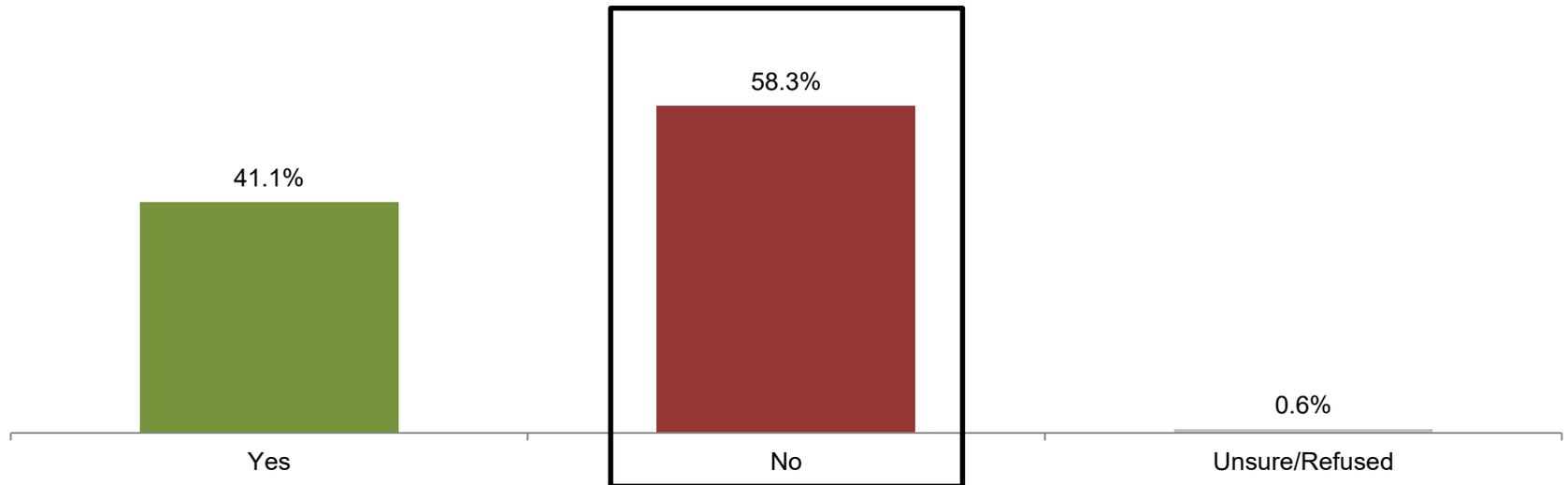


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58.3% Do Not Stay Overnight When They Visit the California coast

Question: Do you ever stay overnight when you visit the California Coast?



**ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"*

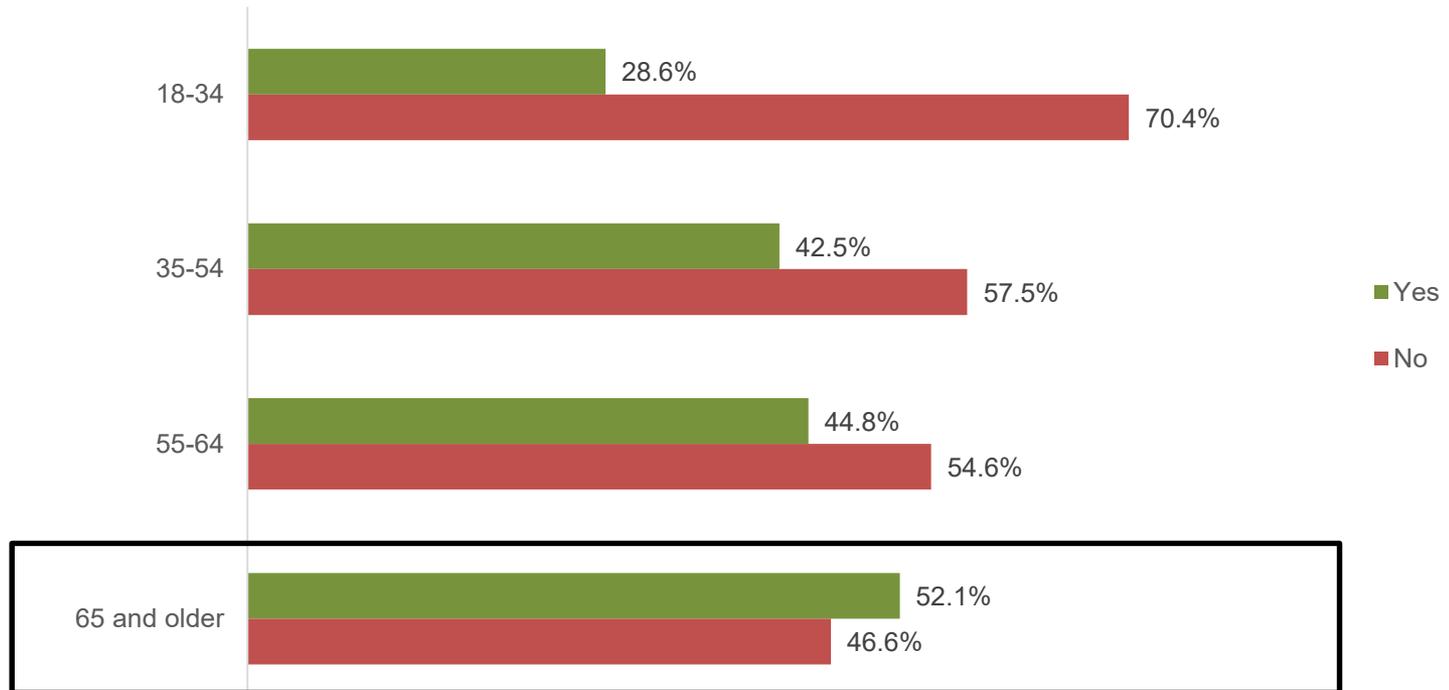


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Californians 65 and older are the only Age group (majority) that stays overnight when visiting the CA coast

Question: Do you ever stay overnight when you visit the California Coast?



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"

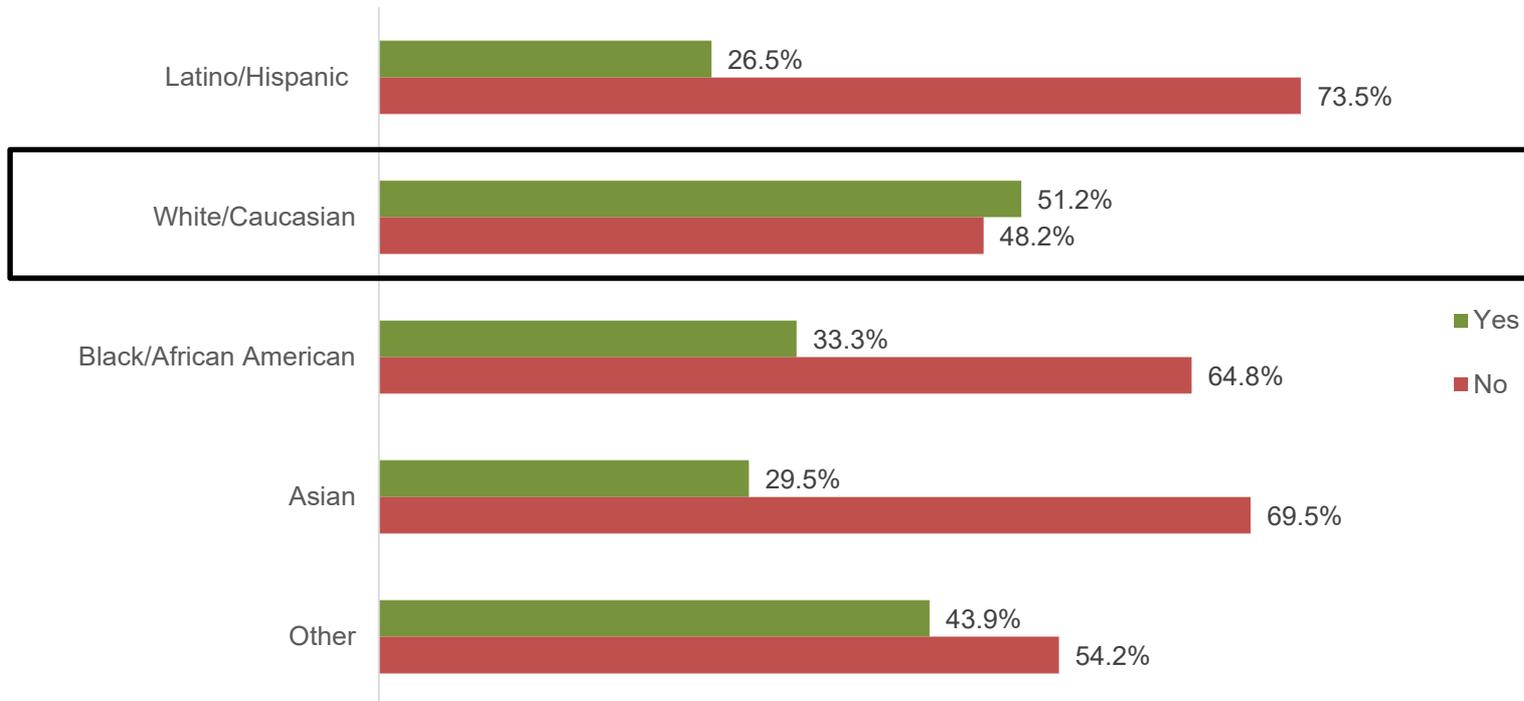


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A Majority of White/Caucasian Residents Say they stay overnight when they visit the California coast

Question: Do you ever stay overnight when you visit the California Coast?



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"

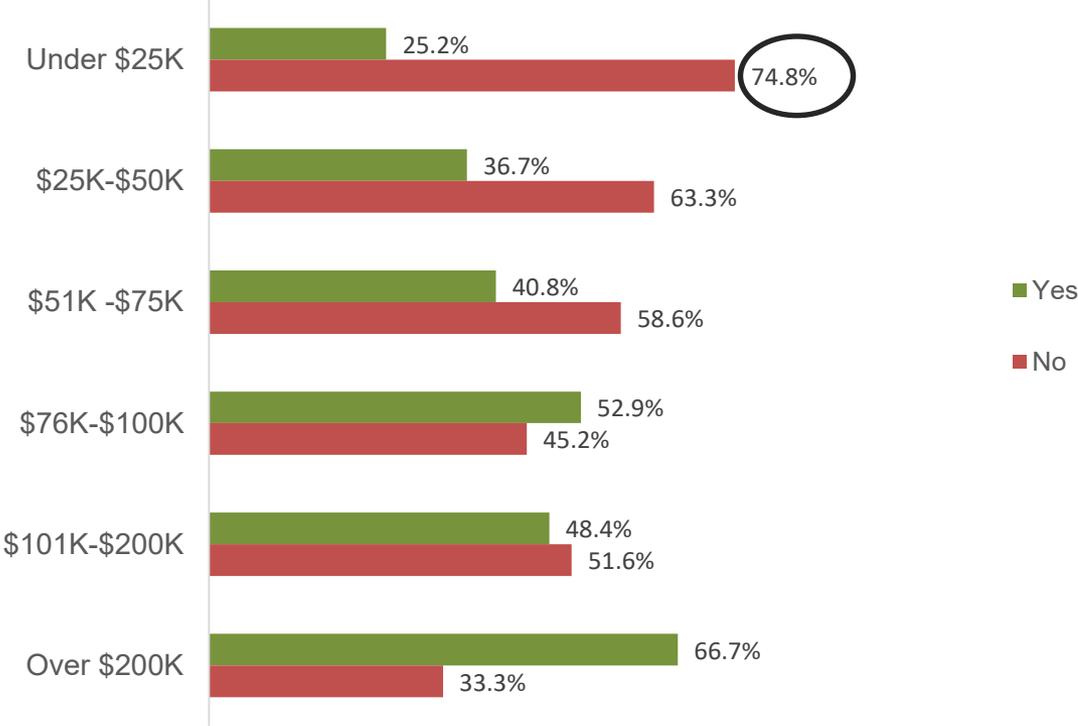


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74.8% of Those with a Household Income Under \$25K do not stay overnight at the CA coast

Question: Do you ever stay overnight when you visit the California Coast?

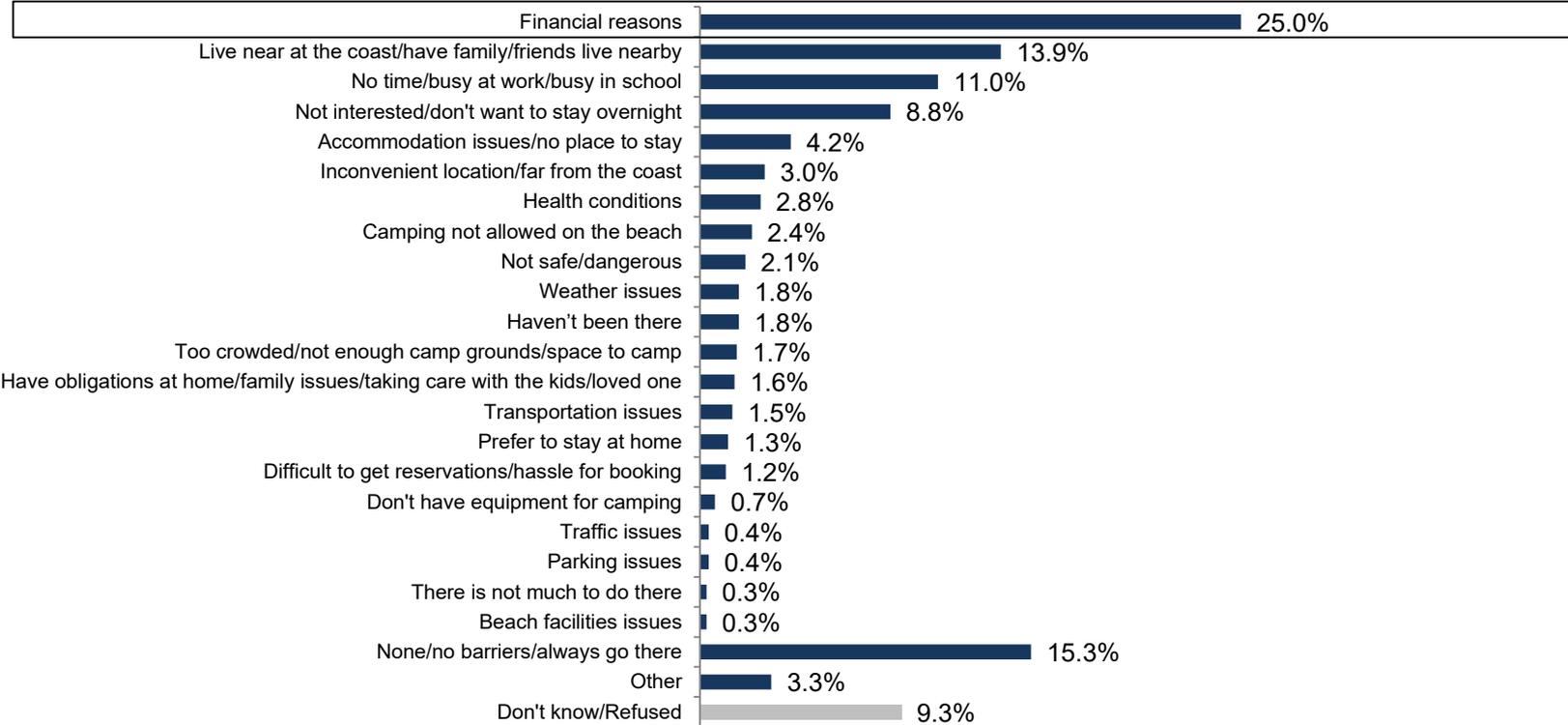


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25% of Respondents Note Financial Reasons as a barrier to staying overnight at the CA coast

Question: In your own words, please tell me what are the barriers to staying overnight at the California Coast.



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"



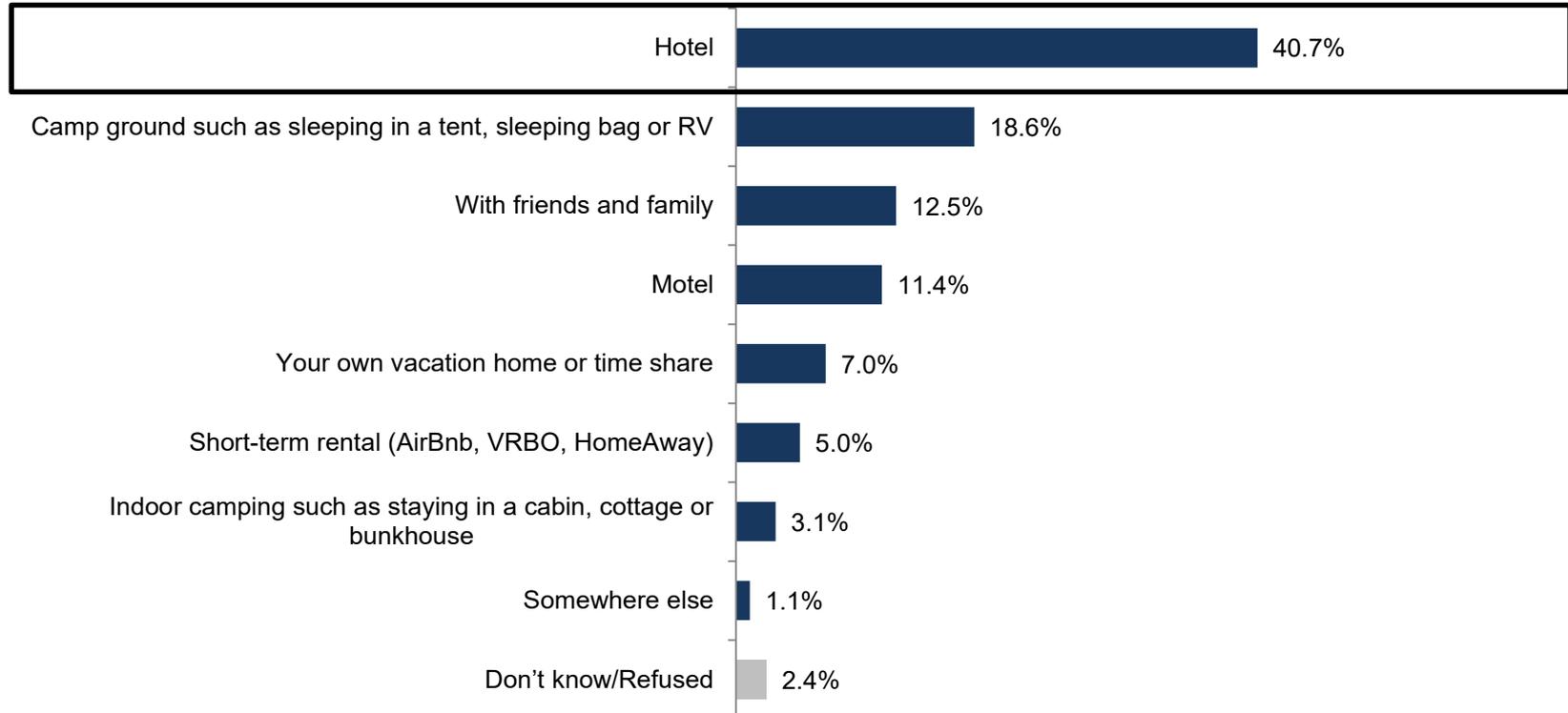
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Hotel Accommodations are Most Common

Among respondents when they visit the California coast

Question: What kind of accommodations do you stay at when you visit the California Coast?



**ASKED ONLY OF THOSE WHO RESPOND "YES" TO STAYING OVERNIGHT AT THE COAST*

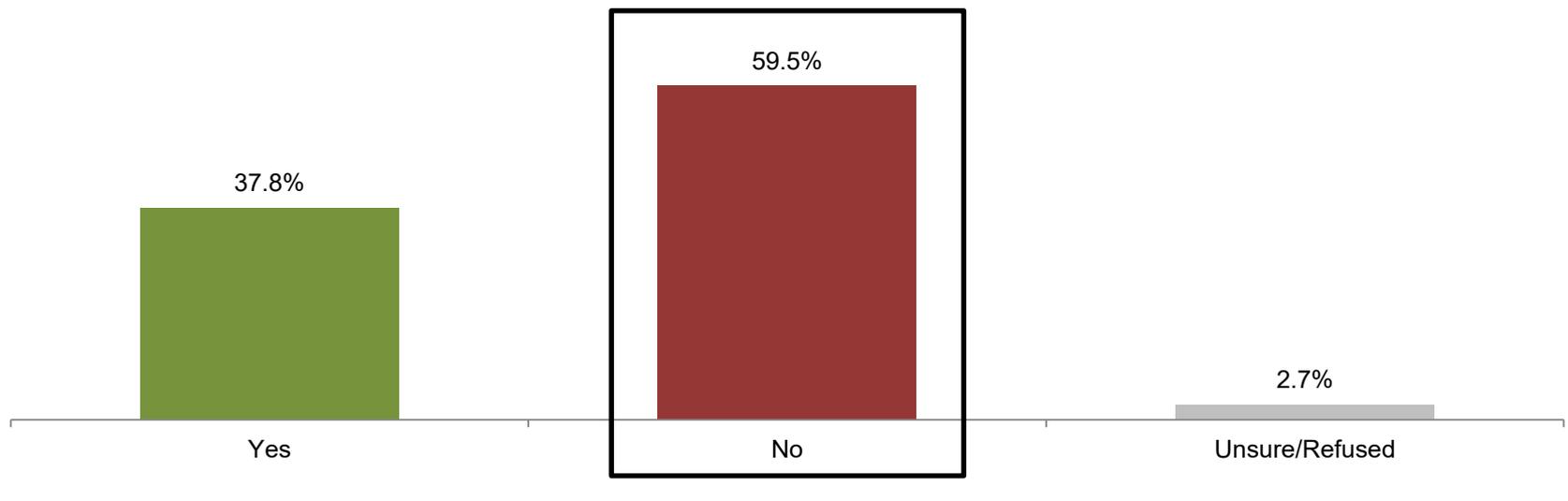


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59.5% of Respondents Would Not Stay in College dorms, or other similar accommodations, near the coast

Question: If there was an option to stay in college dorms near the coast, or other similar accommodations with shared bathrooms, for a modest per night price, would you ever choose to stay there?



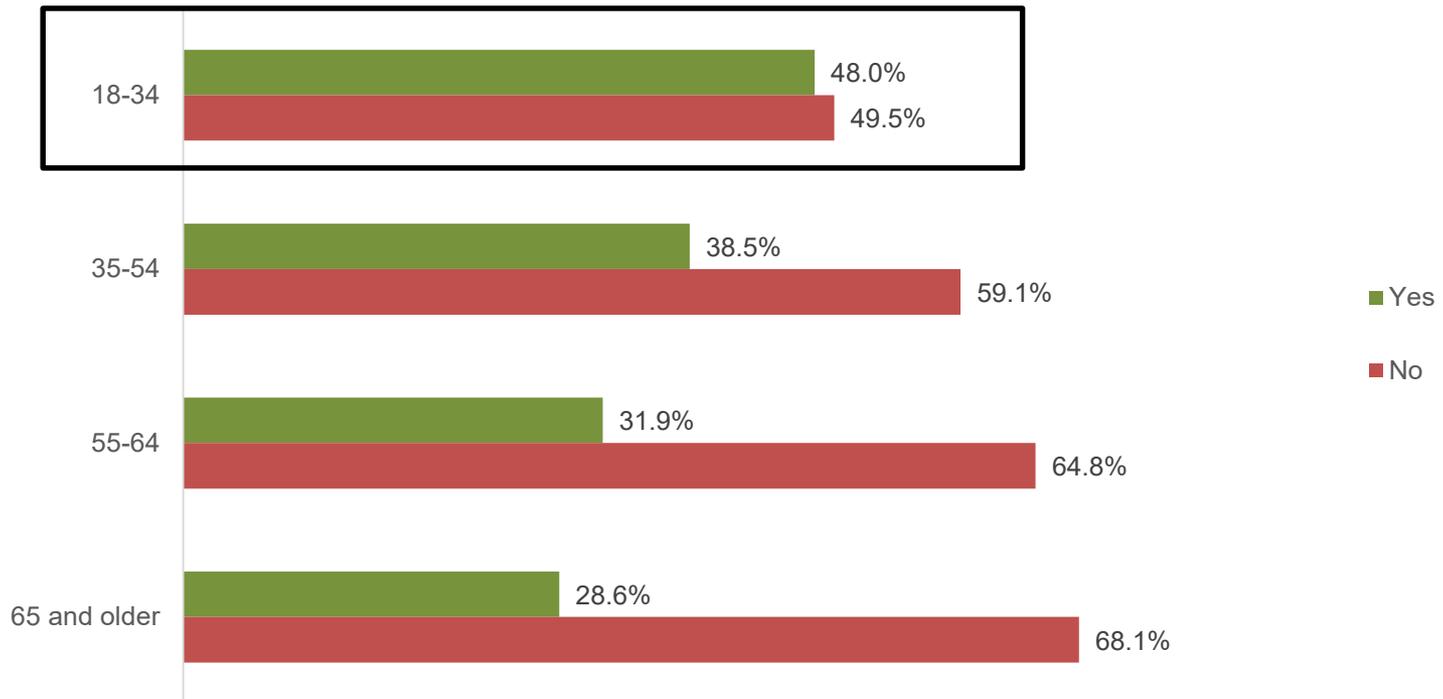
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Respondents 18-34 Show More Inclination

In choosing to stay in college dorms near the coast, or other similar options

Question: If there was an option to stay in college dorms near the coast, or other similar accommodations with shared bathrooms, for a modest per night price, would you ever choose to stay there?



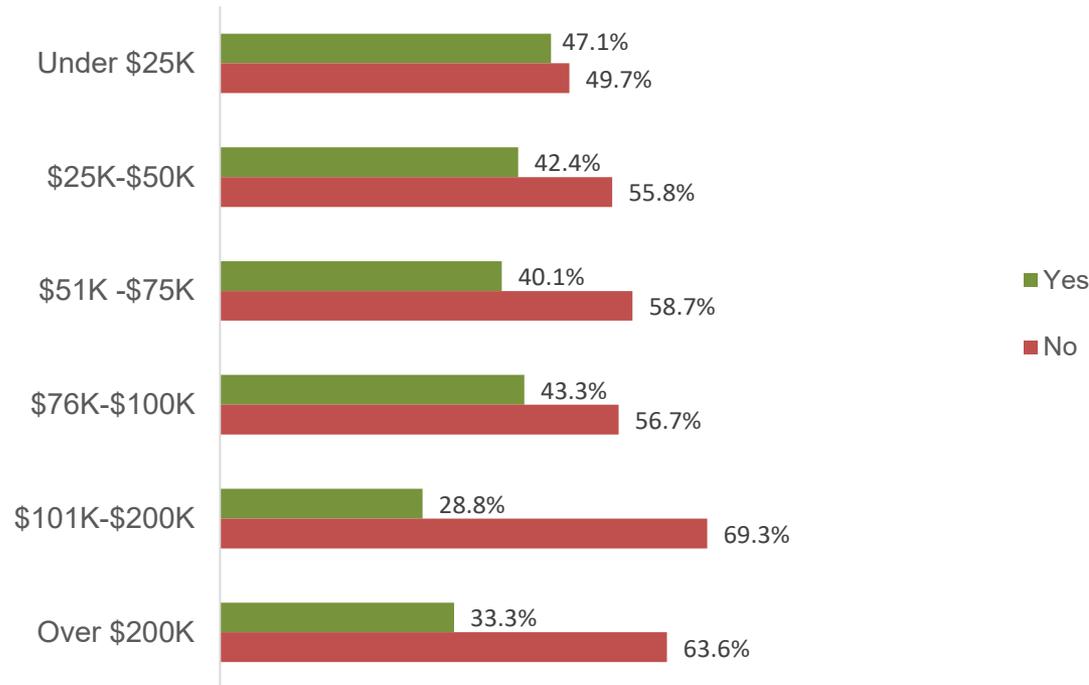
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A Majority of Respondents Across All Income

Brackets would not choose to stay in college dorms/similar accommodations near the coast

Question: If there was an option to stay in college dorms near the coast, or other similar accommodations with shared bathrooms, for a modest per night price, would you ever choose to stay there?



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Overnight Accommodations

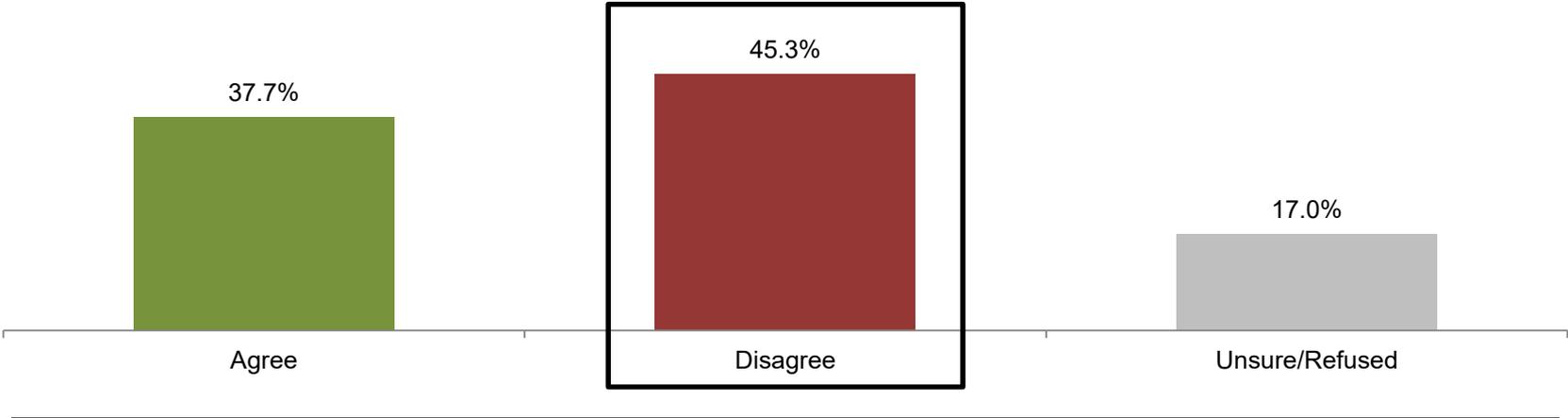


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45.3% of Respondents Disagree that Finding overnight accommodations at the CA coast is convenient and affordable

Statement: Finding overnight accommodations at the California Coast is convenient and affordable.



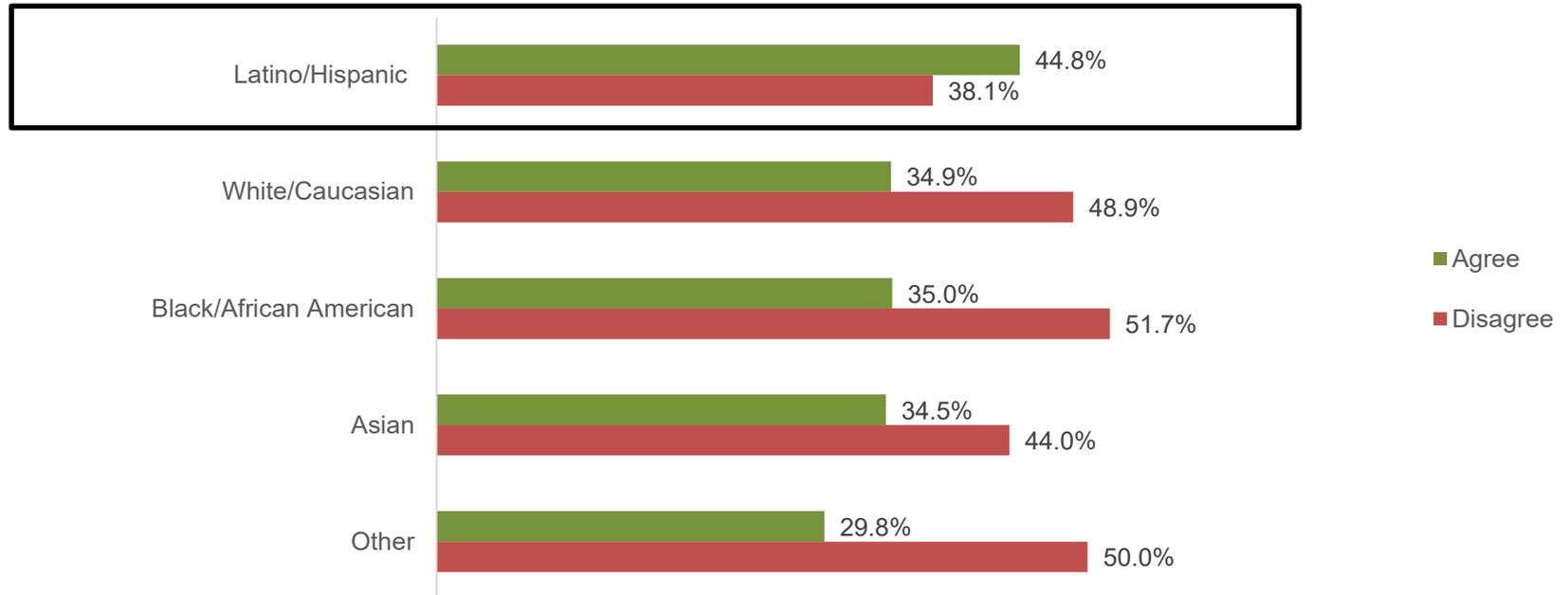
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Latino/Hispanic Residents Agree the

Most that finding overnight accommodations at the CA coast is convenient, affordable

Statement: Finding overnight accommodations at the California Coast is convenient and affordable.



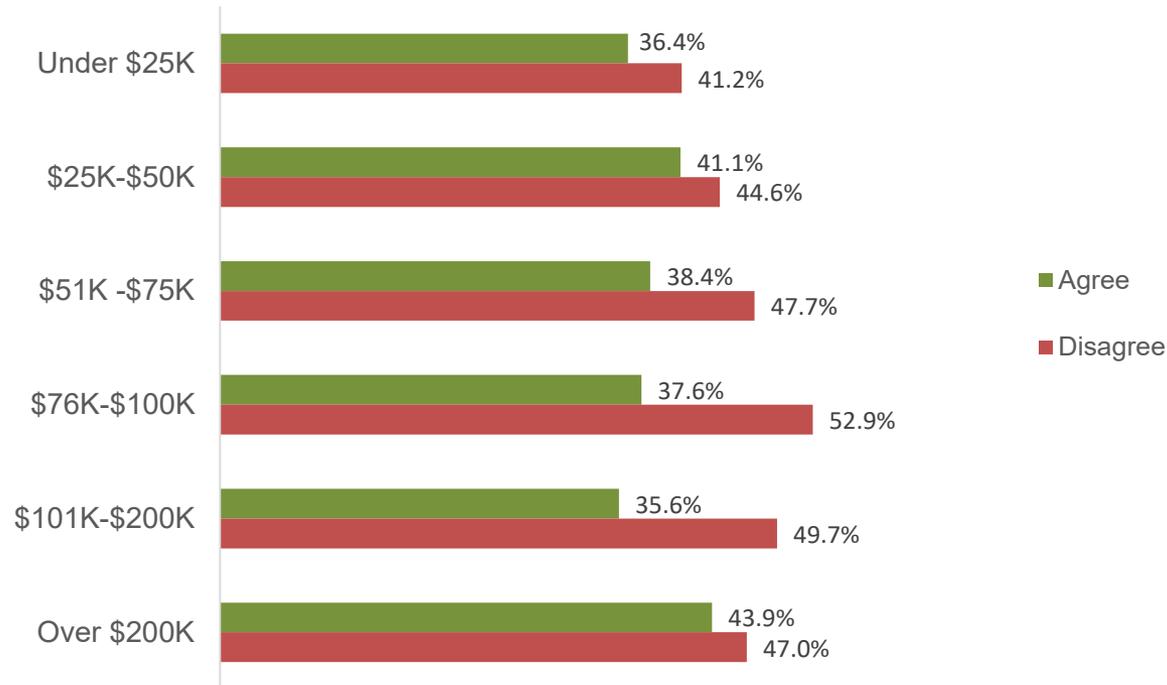
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A Majority of Respondents Across All Income

Brackets disagree that finding overnight accommodations at the CA coast is convenient and affordable

Statement: Finding overnight accommodations at the California Coast is convenient and affordable.



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Desire to Visit the Coast More Often

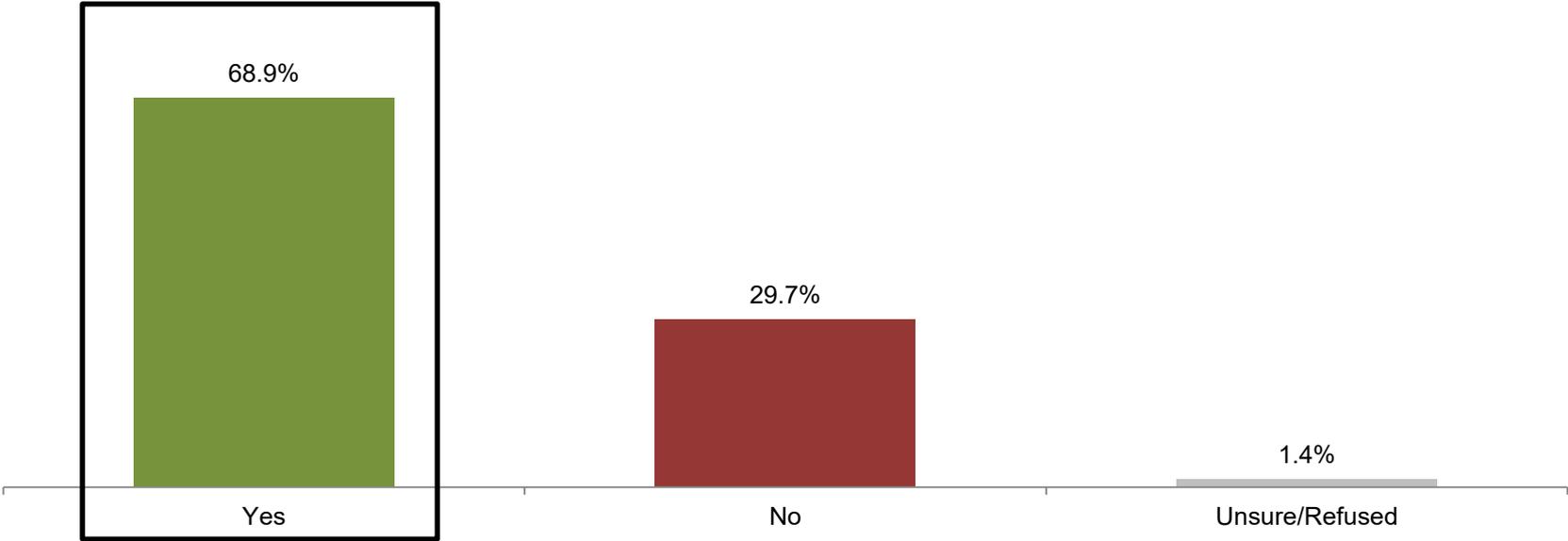


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68.9% Say They Wish They Could Visit the California coast more often

Question: Do you wish you could visit the coast in California more often?



**ASKED OF ALL EXCEPT THOSE WHO RESPONDED "DAILY"*



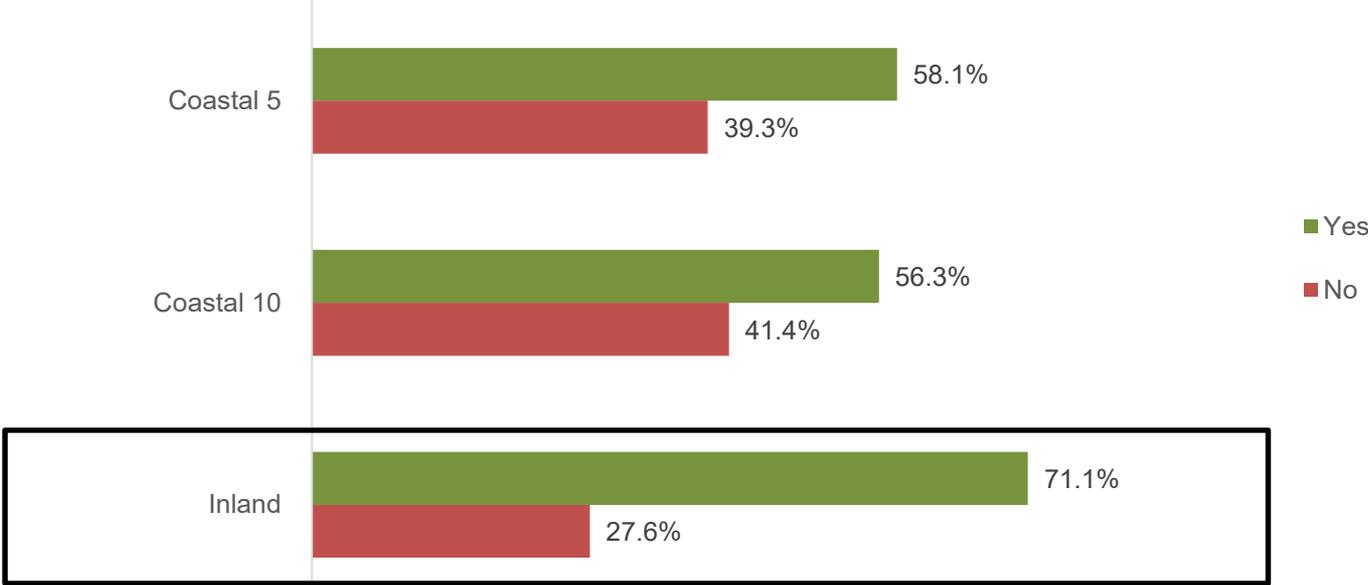
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71.1% of Respondents from Inland Area

Wish they could visit the coast in California more often

Question: Do you wish you could visit the coast in California more often?



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "DAILY"

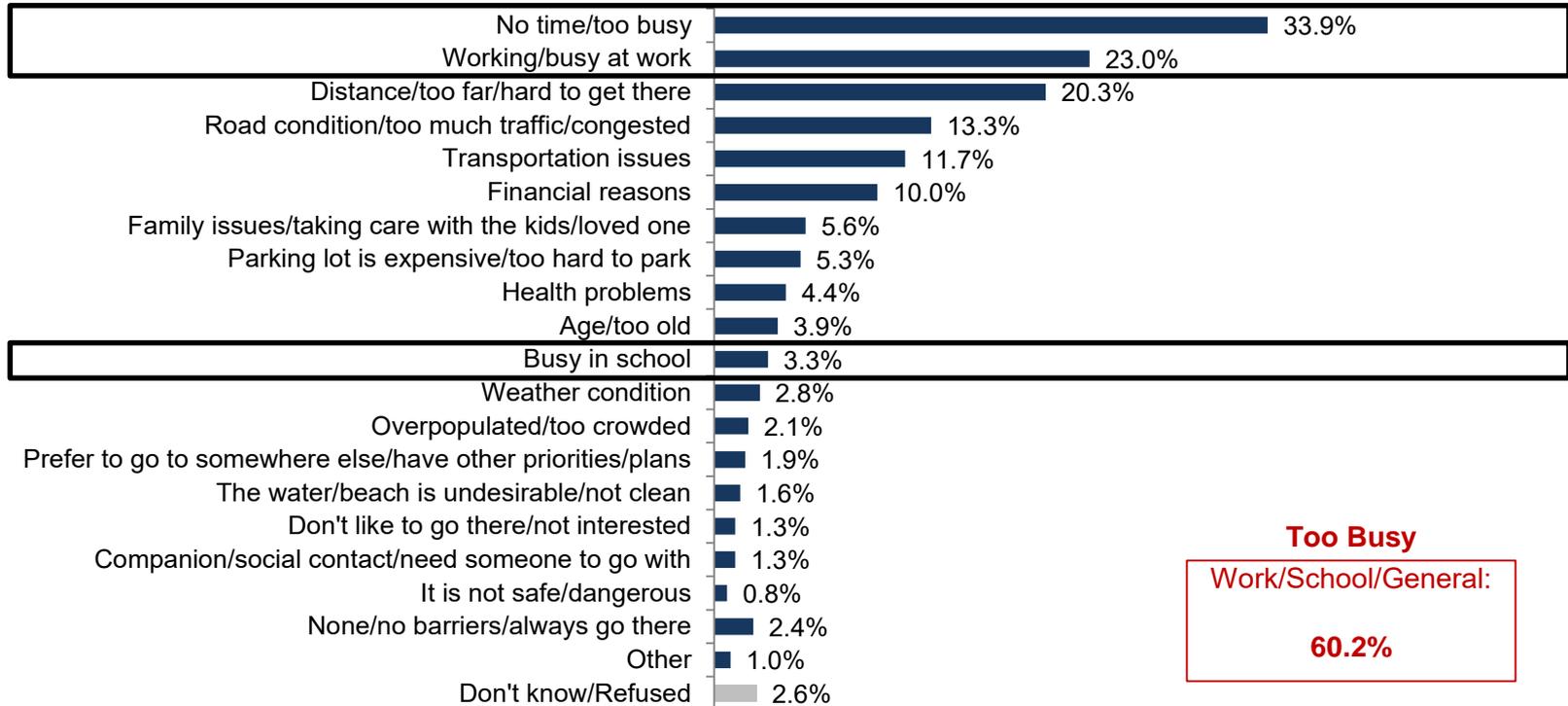


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60.2% Say They Have No Time or are Too busy with work or school to visit the coast more often

Question: In your own words, please tell me what are the barriers to your visiting the coast more often.



*ASKED ONLY OF THOSE WHO WISH THEY COULD VISIT THE COAST MORE OFTEN



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Next Steps



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Next Steps

For the Coastal Conservancy

- CHALLENGE: Concern over transportation and distance cause more people not to visit the coast than any other reason.
 - SOLUTION: Address this with new transportation options, such as partnerships with transit agencies or private enterprise.
- CHALLENGE: Cost is the top reason that prevents people from staying overnight at the coast.
 - Find ways of offering low-cost options for overnight stays, such as the partnering with state universities. Increase/preserve the overall availability of overnight accommodations to drive down/stabilize costs.
- IMPORTANT: Californians have a strong connection to the coast; they appreciate it and want to visit it more. The coast has a different meanings to different people, including some who have fond memories of visiting as a child and others who simply like that the coast is there. Some people want a more active experience when visiting the coast, but most people like it the way it is now. It is important to recognize that even if people are not visiting the coast, they still **highly** value it.
 - Measuring “coastal engagement” is not just about how many people physically visit the coast.



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Thank You.



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A New Generation's Challenges on the California Coast

CALIFORNIANS LOVE THE COAST

Between 83 and 94 percent of California voters say the condition of our ocean and beaches is important to them personally. Darker colors represent a higher percentage of voters in each region.





pidoyle
San Elijo State Beach

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pidoyle Family vacation success.
[#PioDoyleVacay](#)

beccajoydunn Love San Elijo! We have reservations in October! Go get some Bull Taco nachos and enjoy your time in that lovely place! 🤤

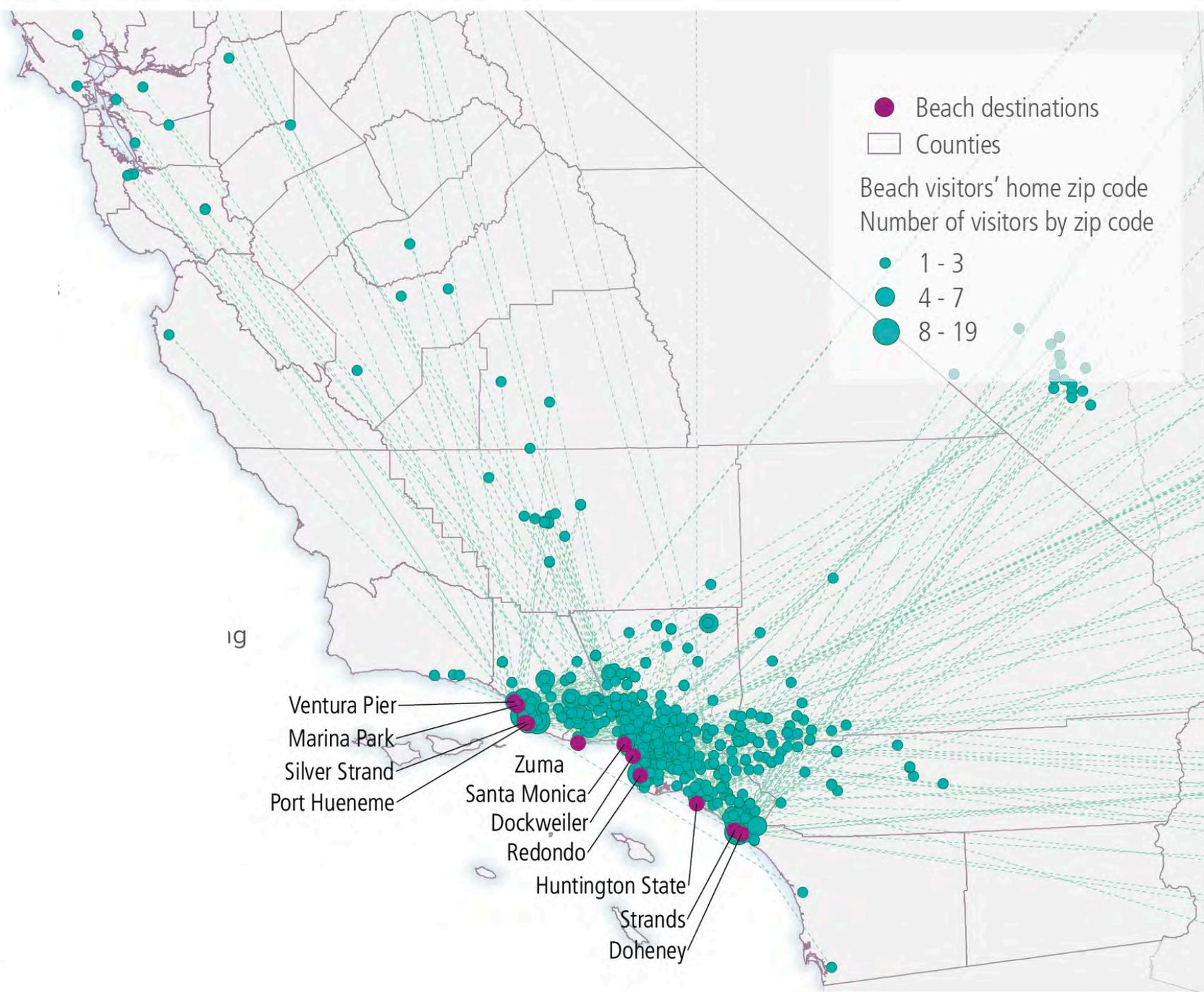
nashifuku Glad you guys are having a great time! Can

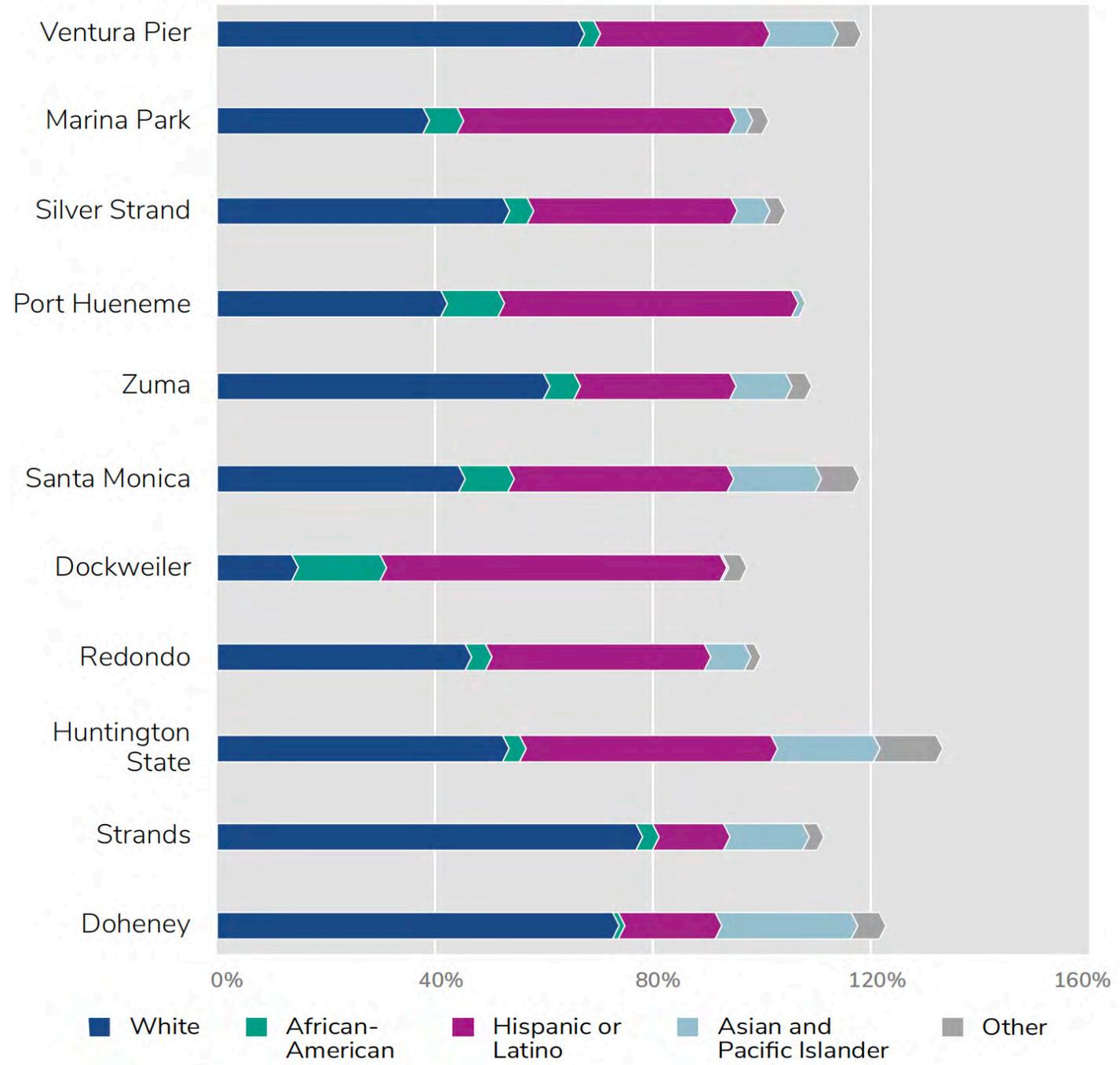
nashifuku Can't wait to hear about it! 🏖️

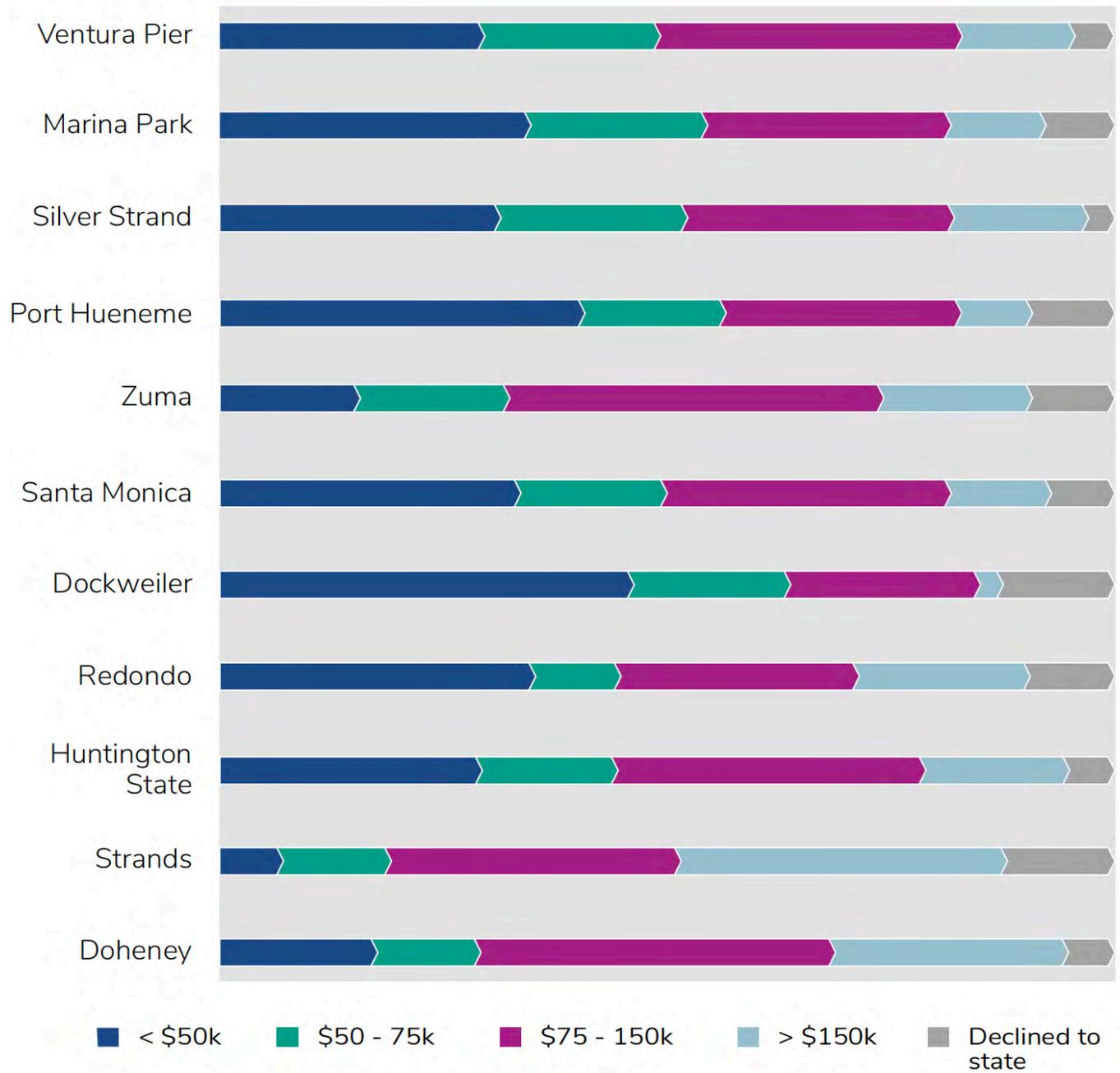


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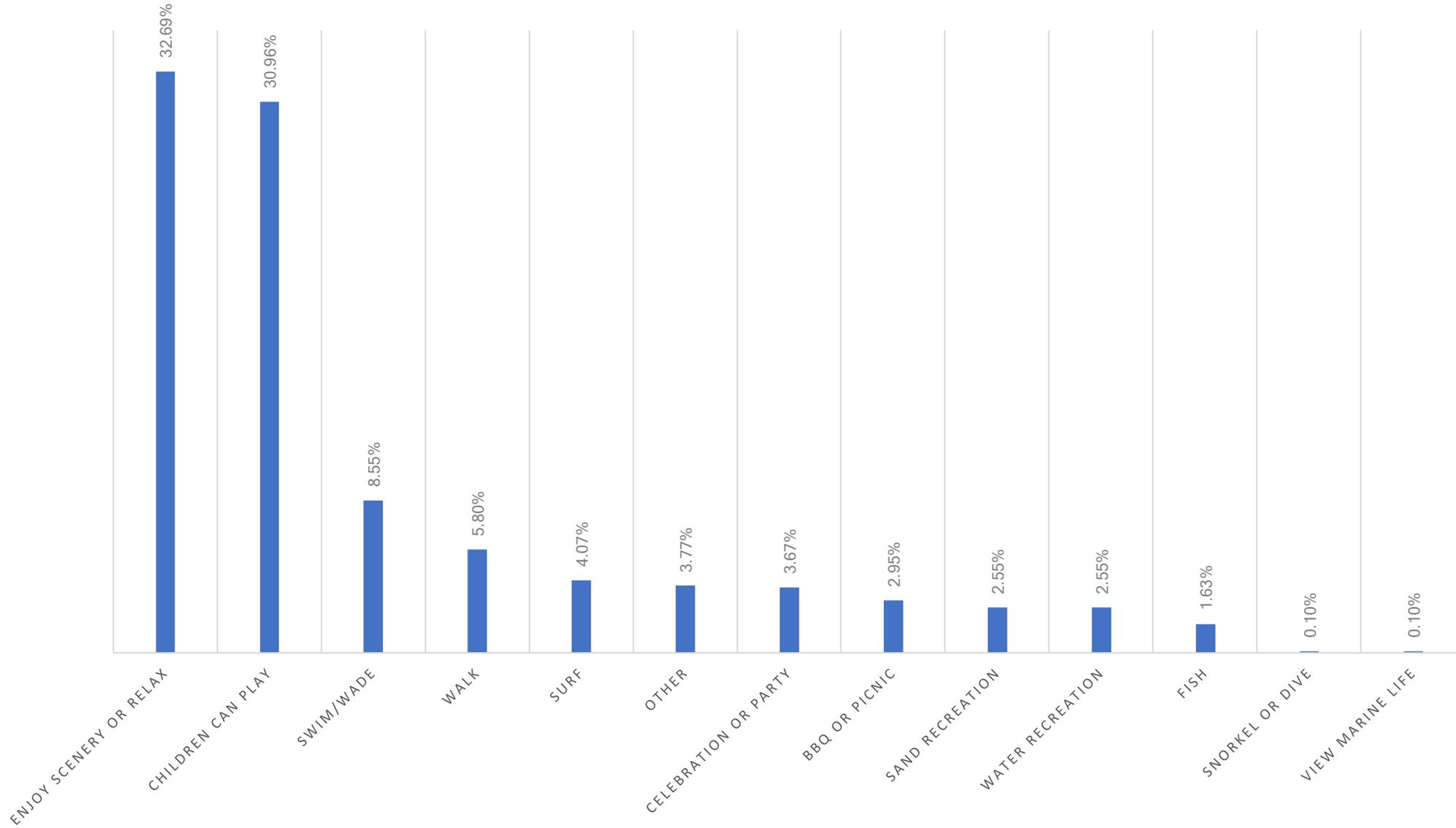








PRIMARY REASONS FOR VISITING THE BEACH

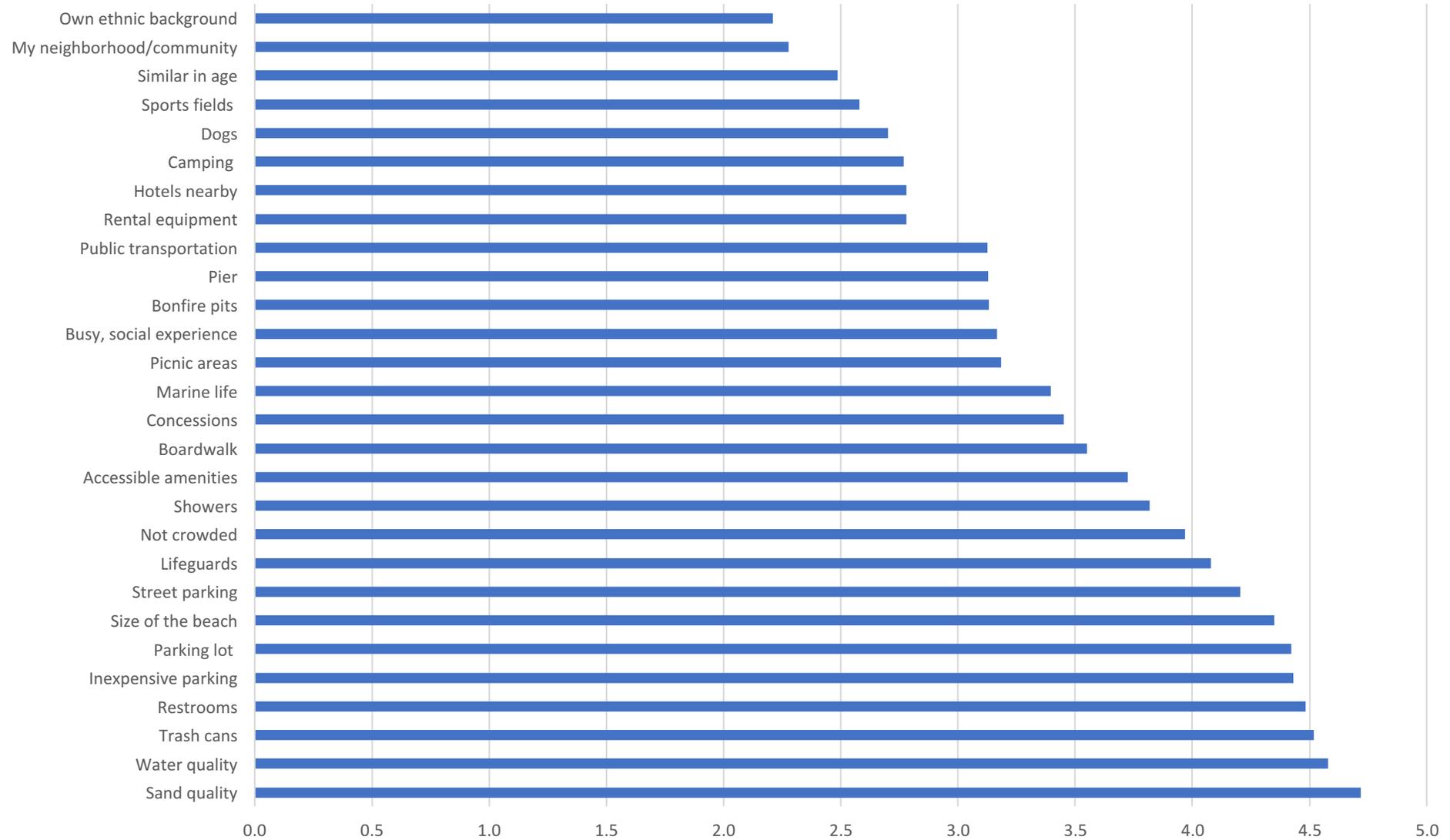




hapakang

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AVERAGE RESPONSE TO HOW IMPORTANT ARE THE FOLLOWING BEACH CHARACTERISTICS TO YOU, ON A SCALE OF 1-5?





How important is the coast to you?

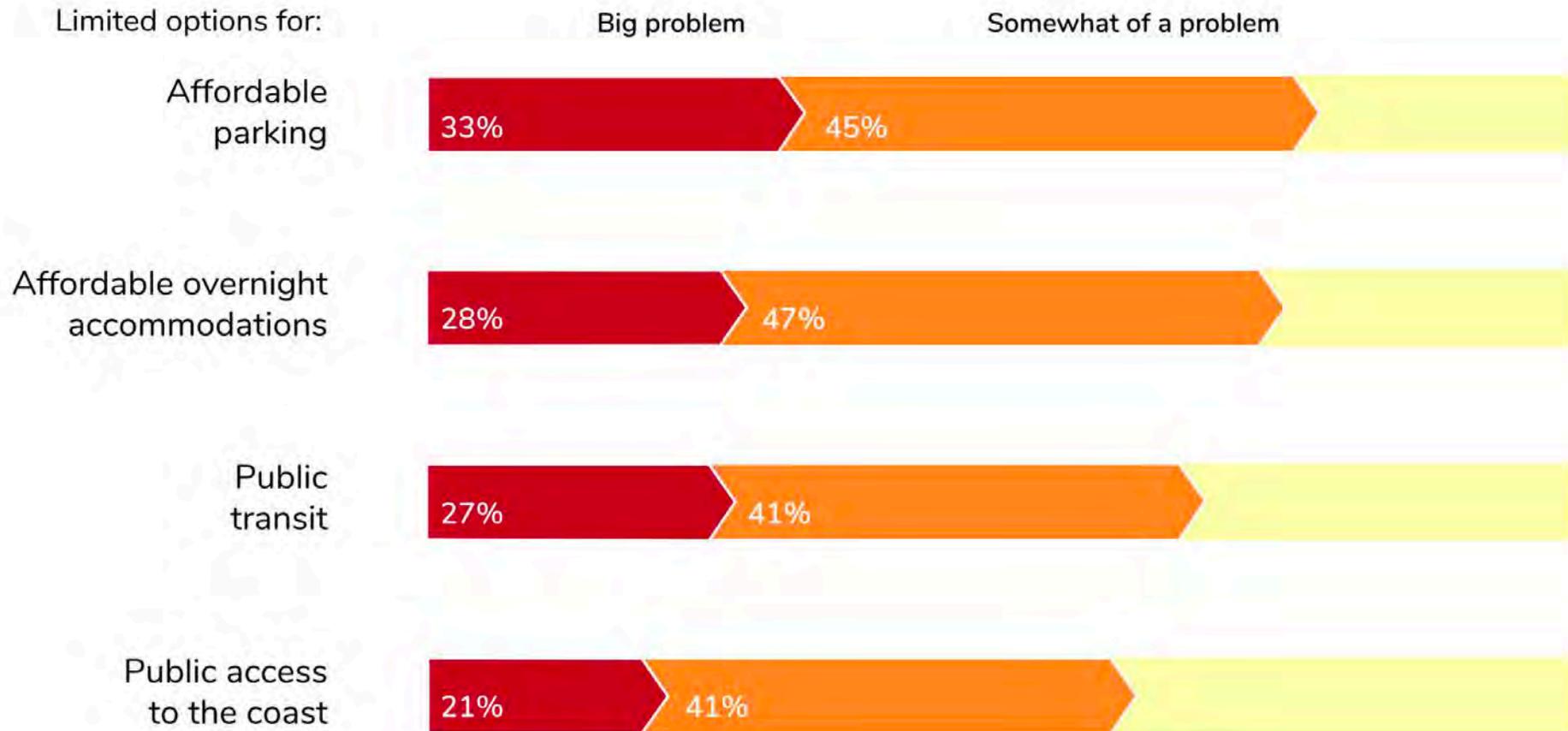
And the most important things at the beach for all Californians? According to our survey of beachgoers: clean sand, clean water, a place to relax and enjoy the scenery, and a place for kids to play.



How often we visit the coast

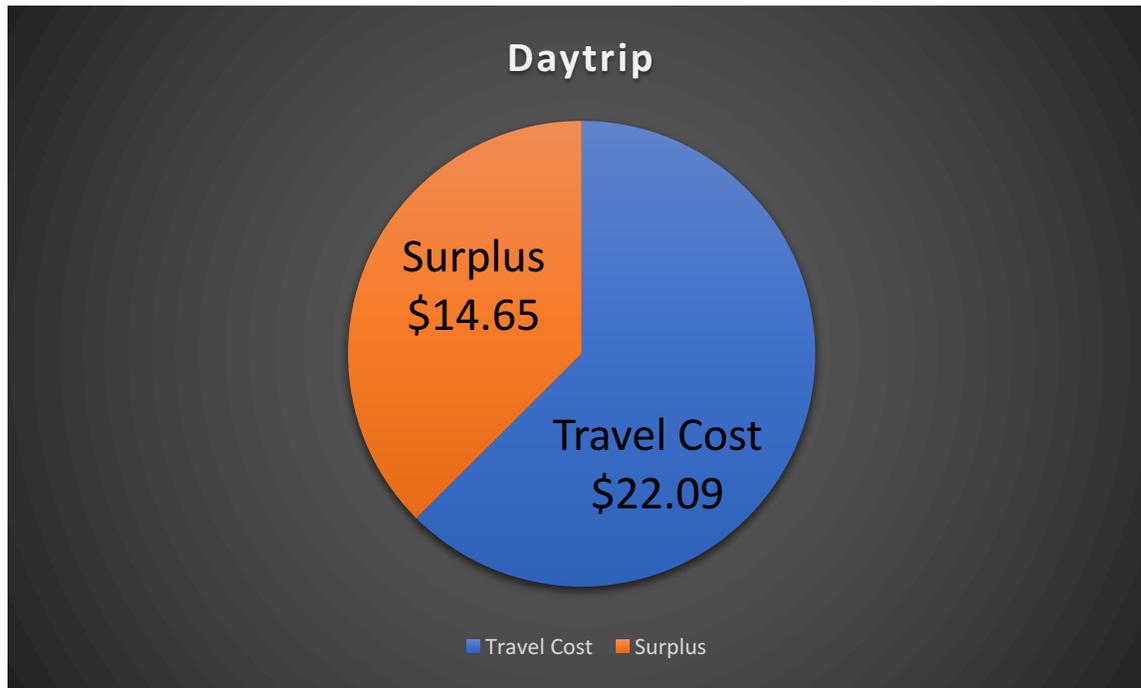
Californians who live farther away from the coast don't visit as often. Distance and time are big factors, along with the cost of staying overnight near the beach.

Four obstacles to coastal access, ranked by California voters



TRAVEL COST MODEL OF VALUE AND COST OF BEACH VISITS

We used a travel cost model to calculate the value of trips to the beach. We found the average day trip had a total value of \$36.74 with travel to the coast costing \$22.09, not including expenses at the beach, leaving a surplus of \$14.65. We found the average overnight trip of four nights had a total value of \$605.05, with travel costing \$194.41, not including lodging, leaving a surplus of \$410.64. Please see our report for details.

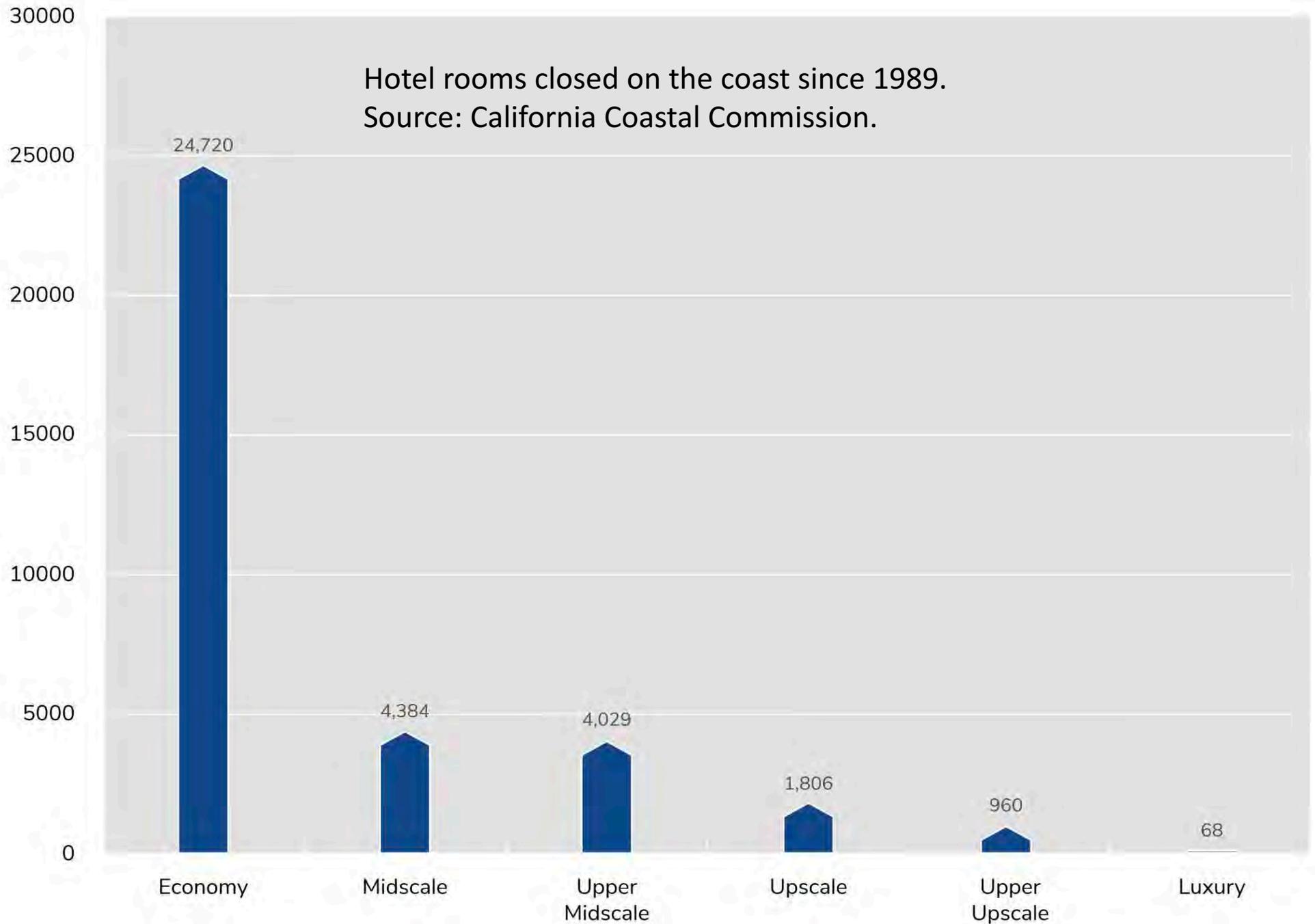


If parking or day-use costs \$15, many visitors might elect not to go to the beach.



For the average stay of four nights, this leaves just \$102.66 a night for lodging.

Hotel rooms closed on the coast since 1989.
Source: California Coastal Commission.



Recommendations

- Focus legislative and executive branch attention on the coast
- Change the narrative on coastal access to be more inclusive
- Increase the supply of low-cost overnight accommodations
- Enhance public transportation options
- Recognize the importance of affordable parking
- Support groups that are changing the culture of access to the coast



CAUSE, Oxnard



Brown Girl Surf, Oakland



Outdoor Outreach, San Diego



ganny21

tower 26 Santa Moni...

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For an interactive version of our full report, as well as downloads of the report, supplements, data, and other references, see: ioes.ucla.edu/coastal-access-california