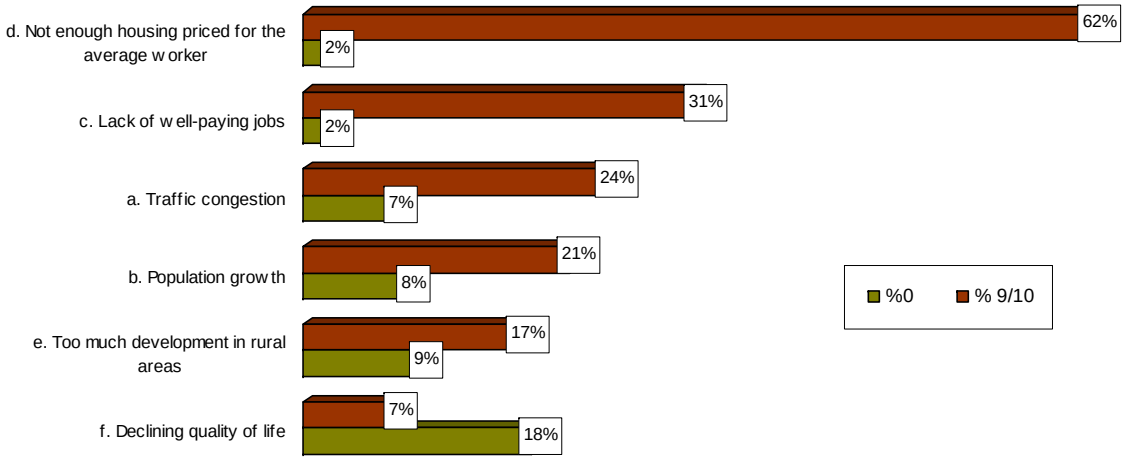
Detailed Findings: Incidence and Seriousness of Problems *(Q3C1)*

Lack of affordable housing and of well-paying jobs are rated as very serious problems. Most say quality-of-life is not declining.

Q3C1(a-f) I am going to read a list of problems that some areas face. For each , I'd like to know if the problem exists in the areas you are most familiar with and, if so, how serious it is .... "10"=Extremely Serious Problem, "0" = Not a Problem



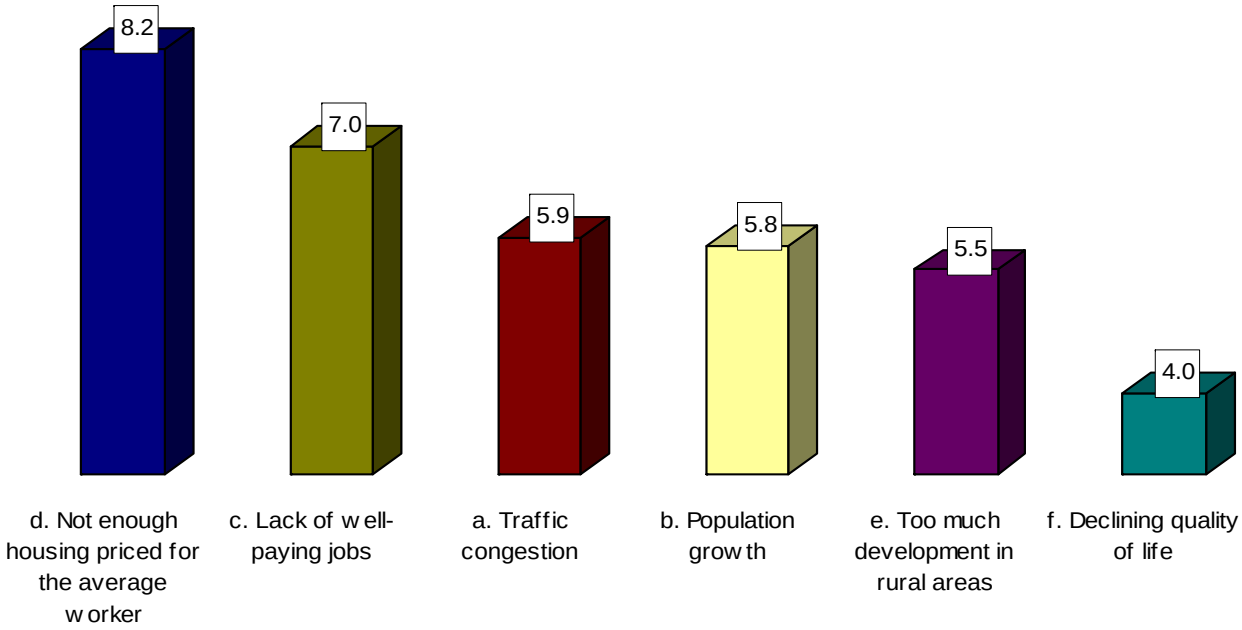
- Problem ratings show strong consensus among households across the county.
- Nearly two-thirds cite "not enough housing for the average worker" as "extremely serious", with a rating of 9 or 10. The average score given this item is 8.2.
- While "not enough well-paying jobs" also rates high, only 31% give this item a 9 or 10 on the scale.
- Traffic congestion, population growth, and development in rural areas are seen as problems, but are much less serious overall.
  - These issues are bigger concerns in growing North and South County, but still rank well below concerns for housing.

OPINION STUDIES

Detailed Findings: Incidence and Seriousness of Problems *(Q3C1)*

Average / Mean Rating Scores

Q3C1(a-f) I am going to read a list of problems that some areas face. For each , I'd like to know if the problem exists in the areas you are most familiar with and, if so, how serious it is.
('10'=Extremely serious; '0'=Not a problem)

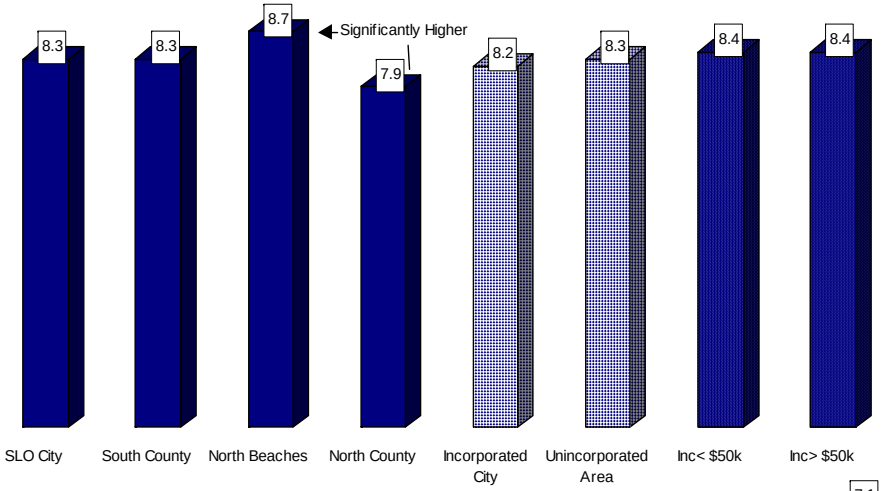


OPINION STUDIES

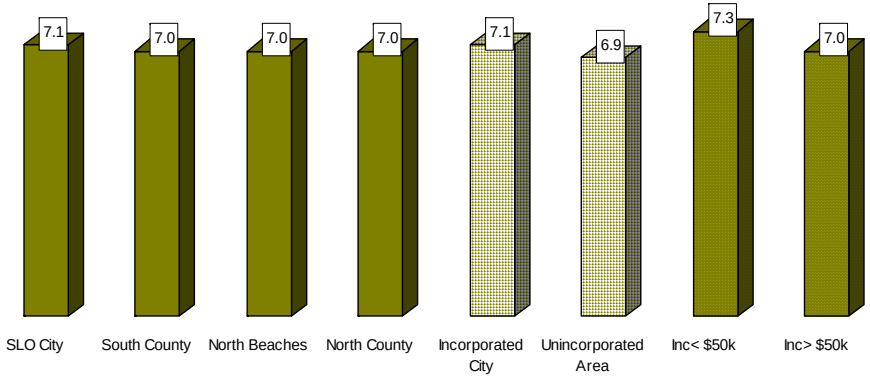
Detailed Findings: Incidence and Seriousness of Problems *(Q3C1)*

Q3C1(a-f) I am going to read ... I'd like to know if the problem exists ... and, if so, how serious it is.
Mean Ratings by Subgroup ('10'=Extremely serious; '0'=Not a problem)

Not enough housing priced for the average worker



Lack of well-paying jobs

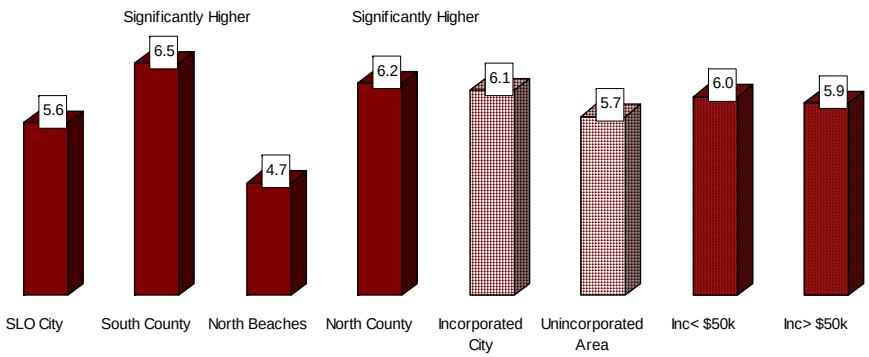


OPINION STUDIES

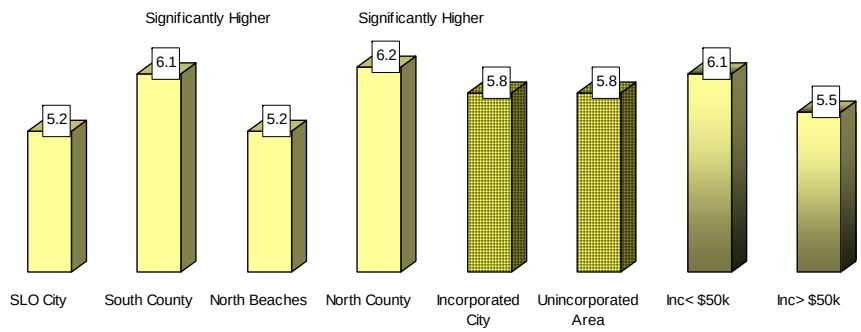
Detailed Findings: Incidence and Seriousness of Problems *(Q3C1)*

Q3C1(a-f) I am going to read ... I'd like to know if the problem exists ... and, if so, how serious it is.
Mean Ratings by Subgroup ('10'=Extremely serious; '0'=Not a problem)

Traffic congestion



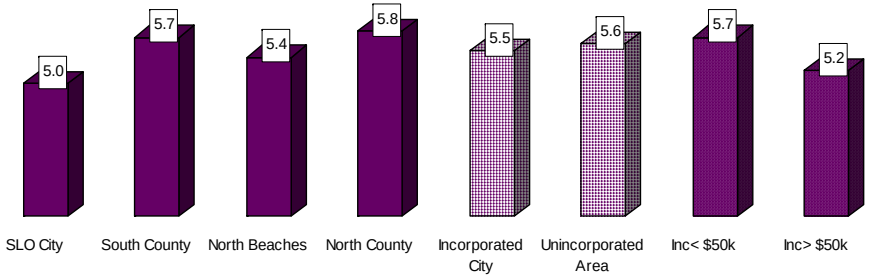
Population growth



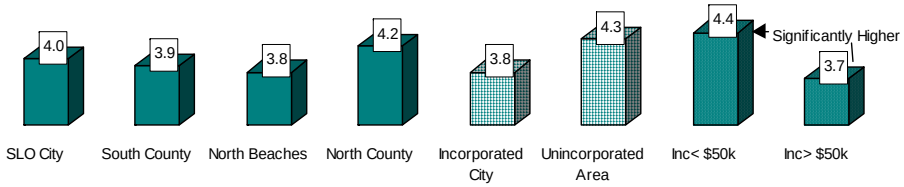
Detailed Findings: Incidence and Seriousness of Problems *(Q3C1)*

Q3C1(a-f) I am going to read ... I'd like to know if the problem exists ... and, if so, how serious it is.
Mean Ratings by Subgroup ('10'=Extremely serious; '0'=Not a problem)

Too much development in rural areas



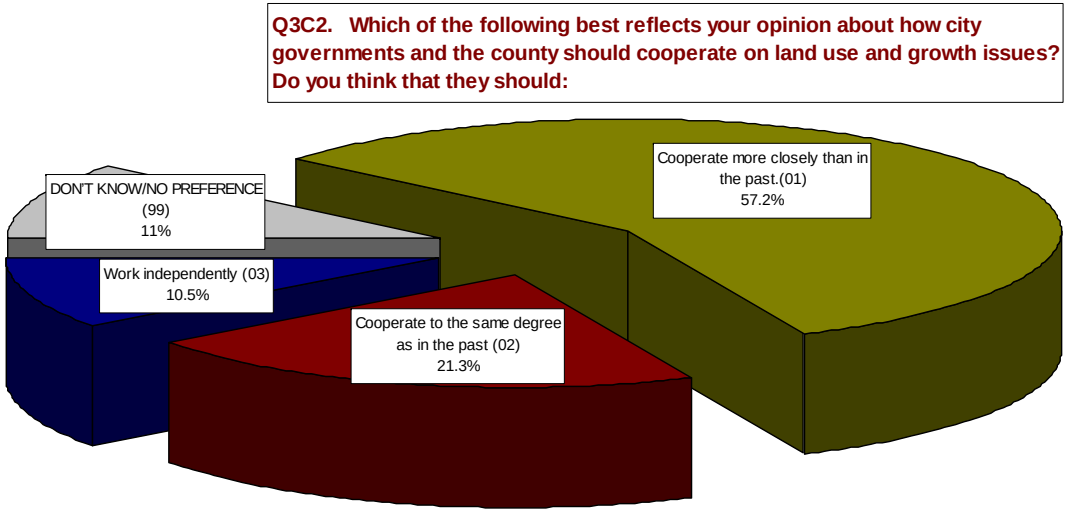
Declining quality of life



OPINION STUDIES

Detailed Findings: Cooperation between City Governments & the County on Land Use & Growth Issues (3QC2)

County residents want city governments and the county to work together more closely than in the past.



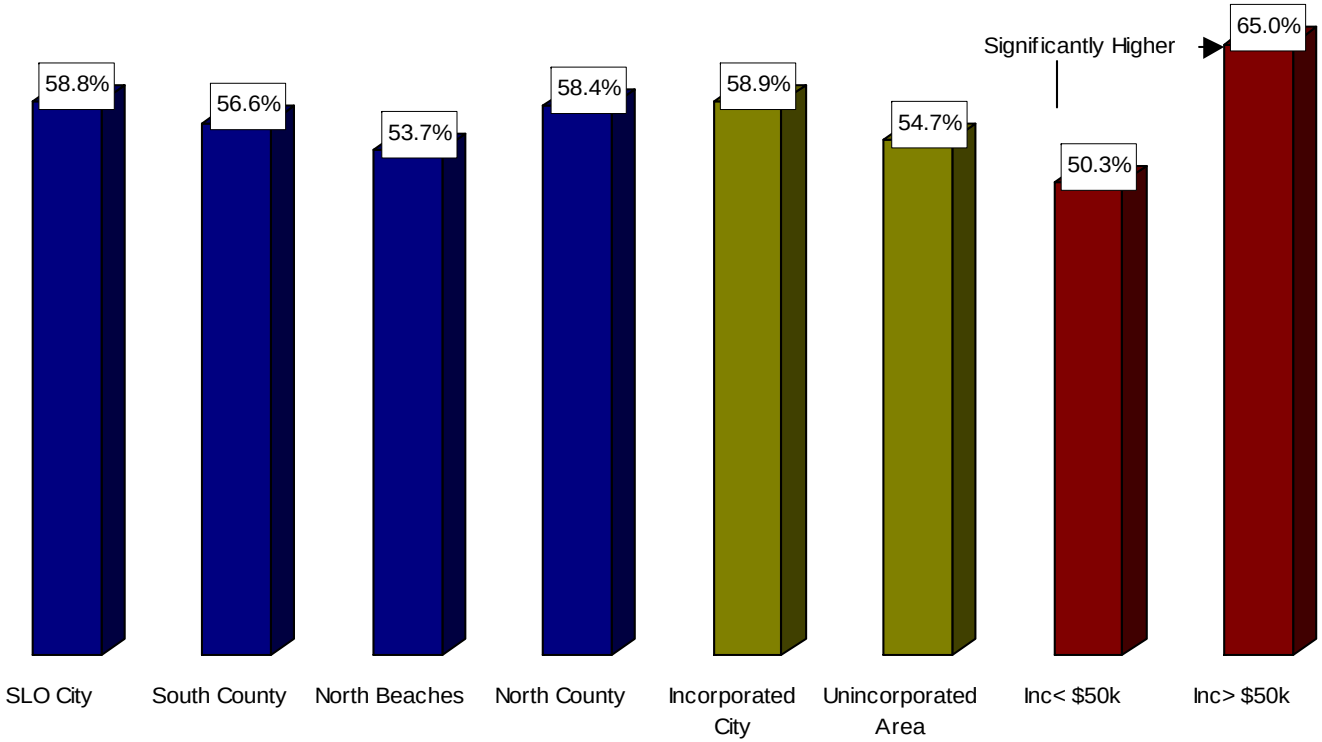
- Public-sector employees are the most likely to call for even greater cooperation.
- Higher income residents and those in middle age groups (ages 45-64) are also more likely than others to want closer cooperation.
- Differences in preference by region are not significant.

OPINION STUDIES

Detailed Findings: Cooperation between City Governments & the County on Land Use & Growth Issues *(3QC2)*

Q3C2. Which of the following best reflects your opinion about how city governments and the county should cooperate on land use and growth issues? Do you think that they should:

Cooperate more closely than in the past

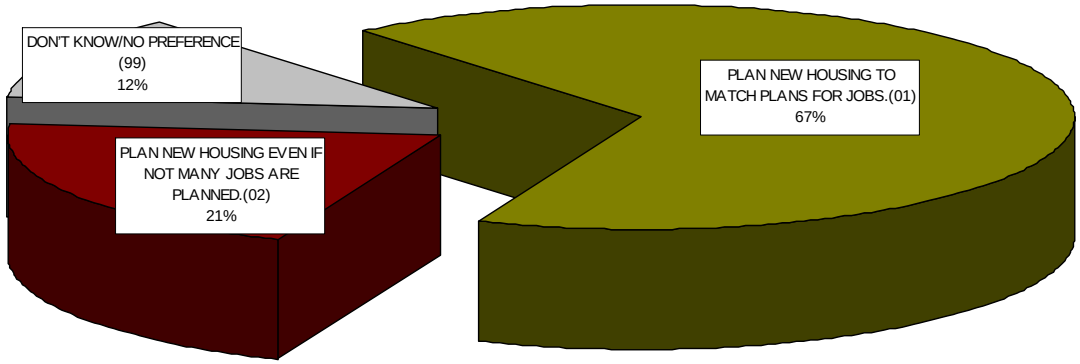


OPINION STUDIES

Detailed Findings: Relationship between Housing and Job Growth Plans *(Q3C3)*

Two-thirds of households advise local governments to plan new housing to match plans for jobs.

Q3C3. Do you think that local governments should match plans for new housing with plans for job growth in a specific area, or should they plan for new housing even if not many jobs are planned in a specific area?

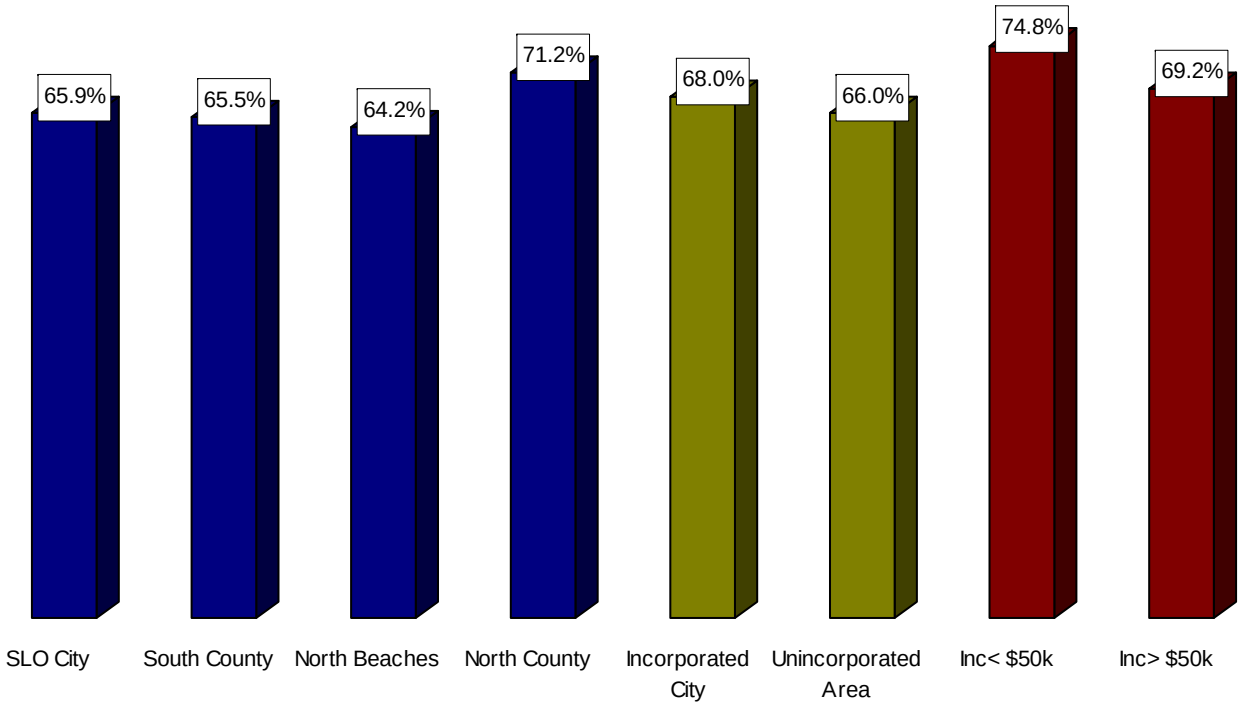


- There are no significant differences by region or income.
- Women are more likely than men to stress a need to plan housing in close coordination with jobs.

OPINION STUDIES

Detailed Findings: Relationship between Housing and Job Growth Plans *(Q3C3)*

Q3C3. Do you think that local governments should match plans for new housing with plans for job growth in a specific area, or should they plan for new housing even if not many jobs are planned in a specific area? % Match job to housing plans

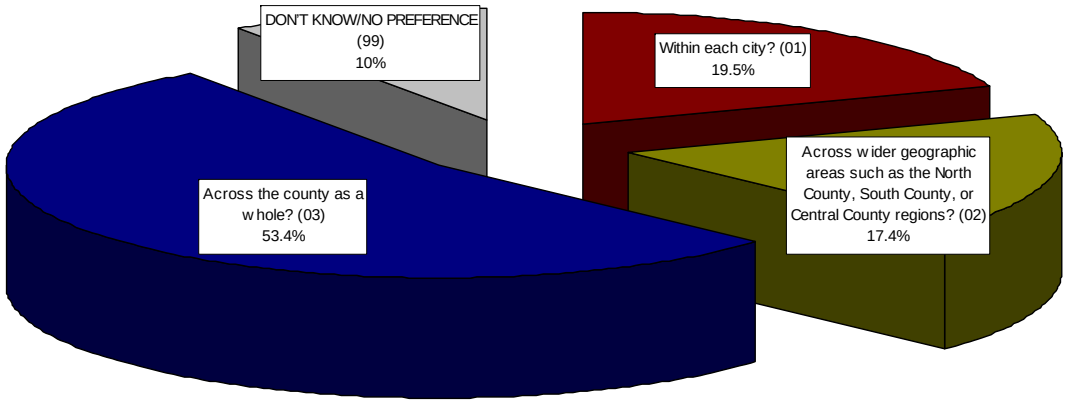


OPINION STUDIES

Detailed Findings: Area-scope for Consideration of Housing and Job Growth Plans *(Q3C4)*

Households are comfortable with a county-wide focus in looking at the balance between number of jobs and housing capacity planning.

Q3C4. How small or large an area should planners be thinking about when making plans for housing and job growth? Do you think that local governments should plan to match growth in jobs and affordable housing:

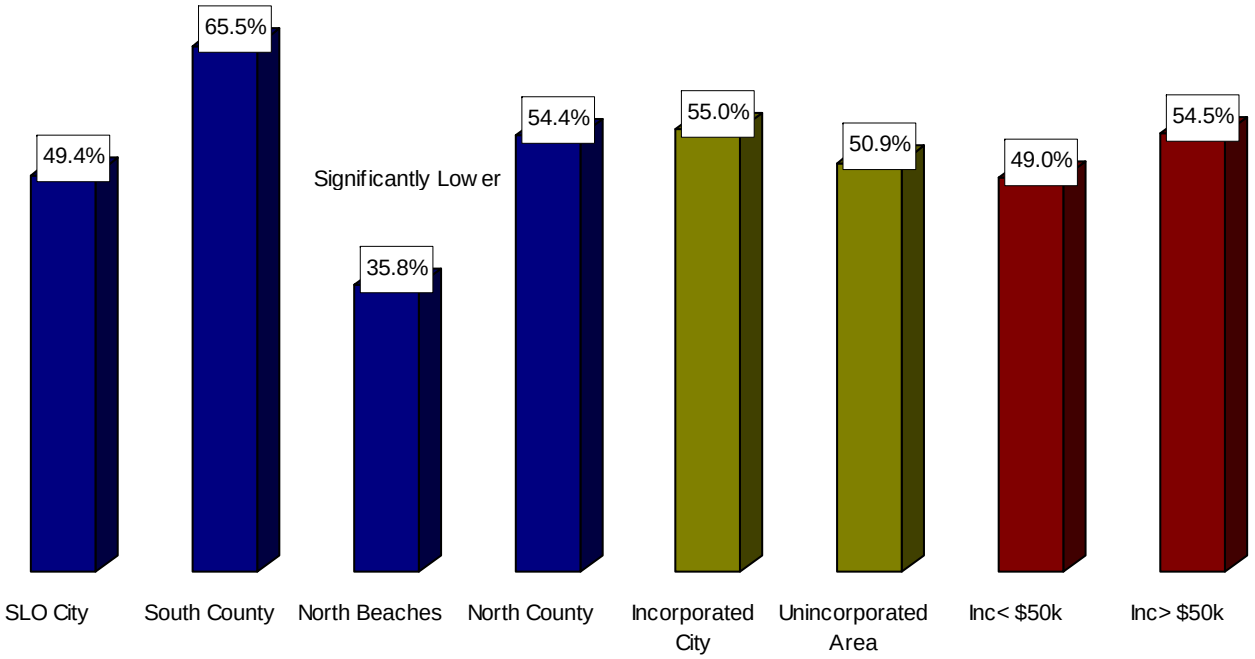


- This may not mean that individuals are willing to accept a long commute. It is also possible they are saying that they want a big-picture view taken in planning overall.
- North Beaches' residents are most distinct. They are evenly divided in preferring a focus on each city independently and the broader county-wide scope.
- Those who place a high priority on walkable communities are just as likely to suggest a regional scope as they are a county-wide perspective.

OPINION STUDIES

Detailed Findings: Area-scope for Consideration of Housing and Job Growth Plans *(Q3C4)*

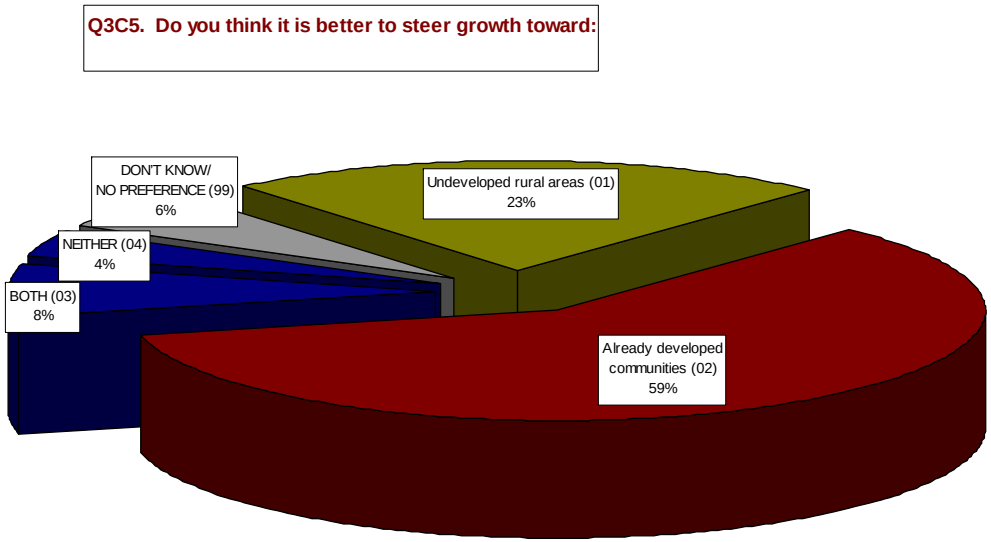
Q3C4. How small or large an area should planners be thinking about when making plans for housing and job growth? Do you think that local governments should plan to match growth in jobs and affordable housing:
% saying "Across the county as a whole"



OPINION STUDIES

Detailed Findings: Growth in Rural Areas vs. in Already Developed Communities *(Q3C5)*

A majority of households wish to steer growth to already developed areas. Still, nearly a quarter feel that steering growth to undeveloped areas is better.

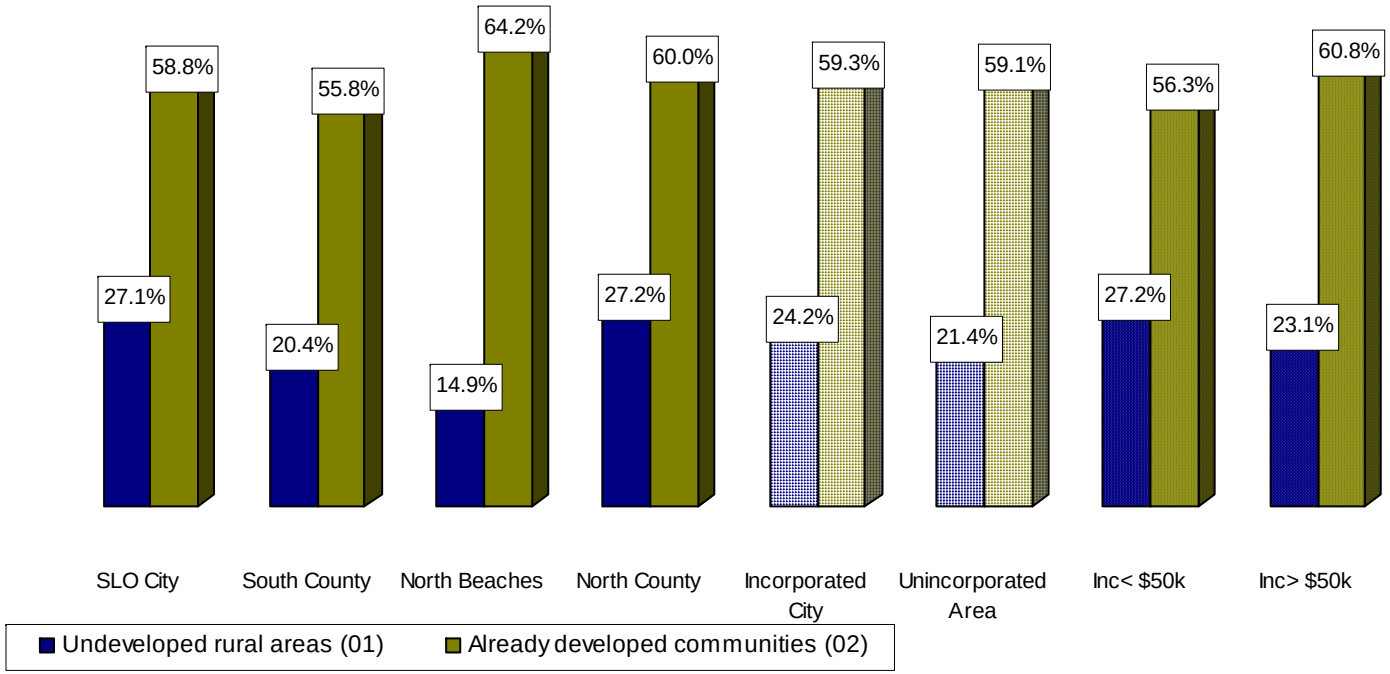


- Larger households (3+ people) are more likely than smaller households to volunteer that both should be allowed.
- Differences on this issue are closely aligned with residents' top planning priorities. Those whose top priority is affordable housing are significantly more open than others to development in rural areas.
- Current renters are more likely than others to advocate growth in undeveloped areas and less likely to volunteer a "no growth" stance. Many who do not currently own a home may see rural development as a means to create affordability.

OPINION STUDIES

Detailed Findings: Growth in Rural Areas vs. in Already Developed Communities *(Q3C5)*

Q3C5. Do you think it is better to steer growth toward undeveloped rural areas or toward already existing communities?



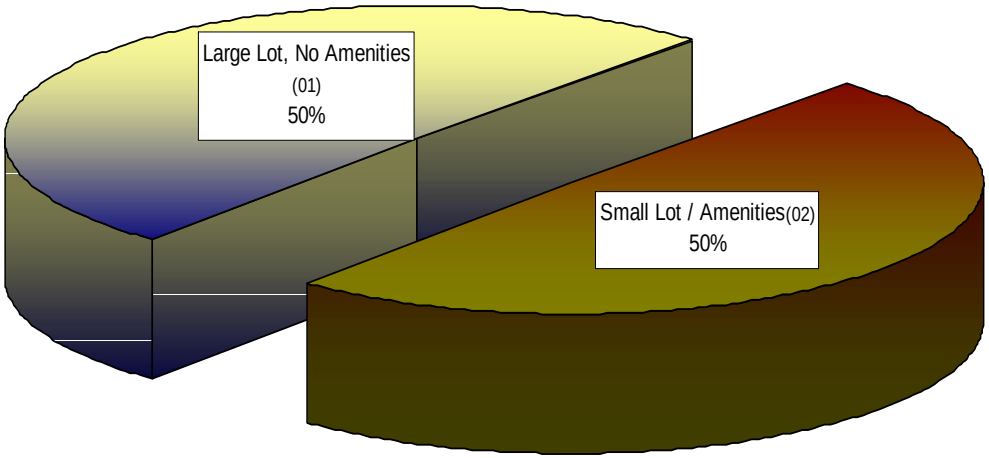
OPINION STUDIES

Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

Households are almost evenly split between preference for larger lots versus being close to parks, shopping, schools, and work.

Other things being equal: Which would you prefer to live in?
a single-family detached home on a large parcel of land, which is not near parks shopping, school, or work (01), or
a single-family detached home on an average or small lot , near parks, shopping, schools, and work (02)



- Preferences seem to be related to life-stage more than to any single demographic variable.
  - Mid-age households, often with three or more family members and including children, are most likely to trade-off nearness to amenities to have a single family home on a large lot.
  - Older, retired householders, tend toward smaller properties close to conveniences.

OPINION STUDIES

Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

Other things being equal: Which would you prefer to live in?
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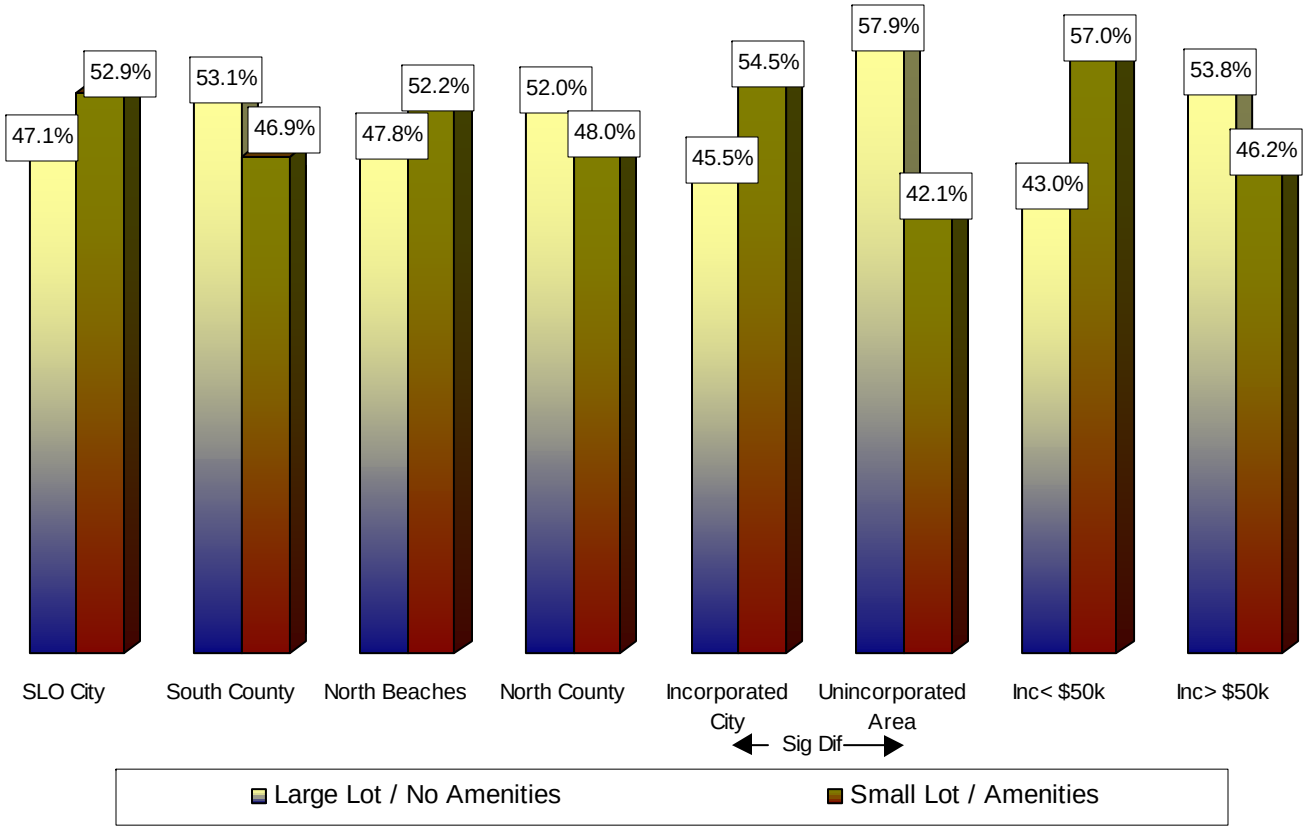
a single-family detached home on an average or small lot , near parks, shopping, schools, and work (02)



OPINION STUDIES

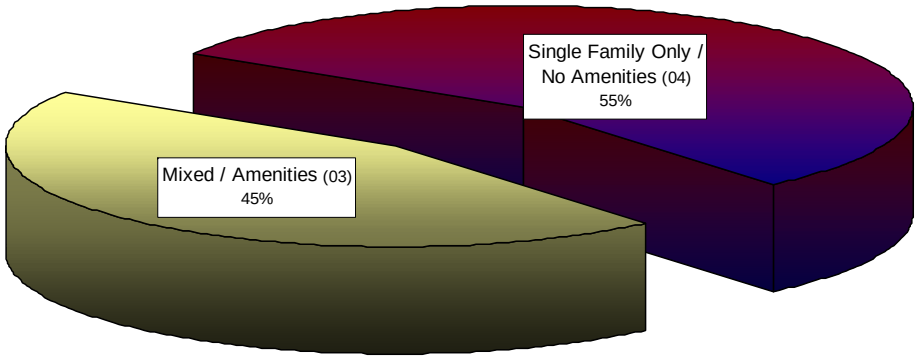
Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

Neighborhoods with a mix of housing types near parks, shopping , school, and work and single-family-only neighborhoods not near these amenities appeal to nearly-equal numbers of households.

- Residents currently living in SLO City show a stronger preference for living in mixed communities close to amenities.
- Households with higher incomes are more likely to opt for single-family-only neighborhoods, even if not close-in.

Q3C6B People say there are tradeoffs in choosing a local community to live in. Other things being equal, which would you prefer to live in?
A neighborhood that is a mix of single family homes, apartments and condo projects, near parks, shopping, school, and work (03) or
a a neighborhood of single family homes only
which is not near parks, shopping, schools or work? (04)

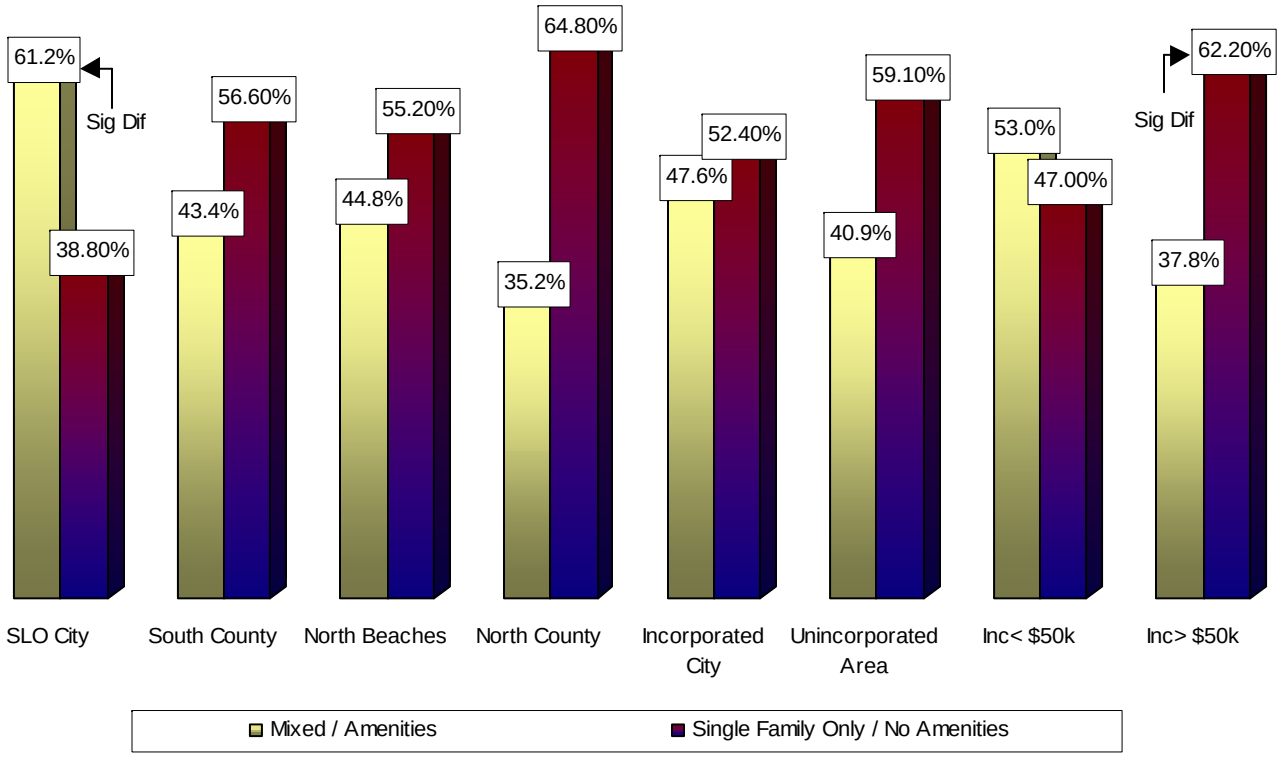


OPINION STUDIES

Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

Q3C6B People say there are tradeoffs in choosing a local community to live in.
Other things being equal, which would you prefer to live in?
a neighborhood that is a mix of single family homes, apartments and condo projects, near parks, shopping, school, and work (03) or
a neighborhood of single family homes only which is not near parks, shopping, schools or work? (04)



OPINION STUDIES

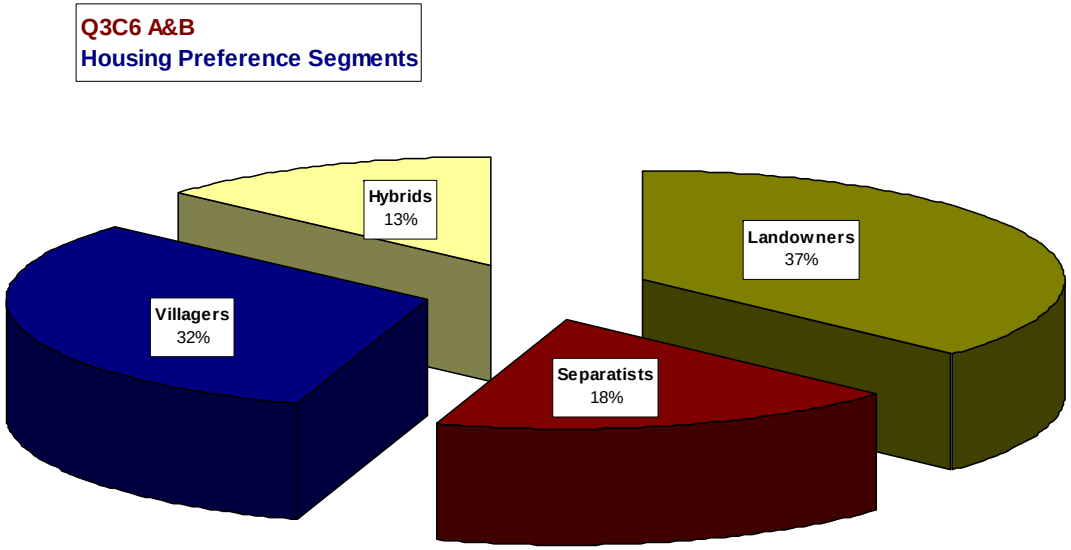
Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

Combining the two questions (C6a&b) highlights four possible preference segments. The two largest are households that:

- prefer a neighborhood of single family only housing, on large lots , and will trade-off nearness to shops, schools etc. (Landowners - 37%)

- prefer a neighborhood that is near amenities (parks, shopping, school or work), and will tradeoff lot size and accept a mix of other housing types (Villagers - 32%)



- A smaller proportion of households will trade-off large lot sizes for access to amenities, but still prefer single-family only neighborhoods. (Separatists - 18%)

- A fourth group seems to be less firm in its preference with a desire for large lots but some openness to the amenities of a mixed use, close-in neighborhood. (Hybrids - 13%)

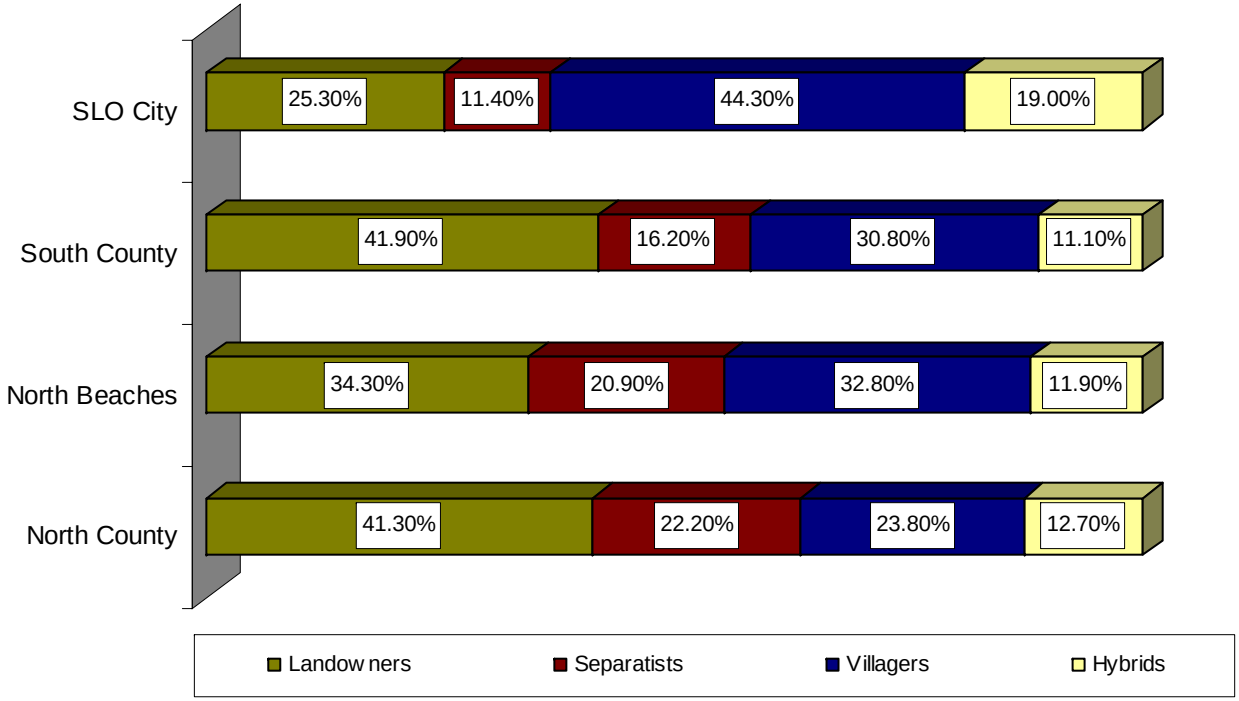
OPINION STUDIES

Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

Q3C6 A&B People say there are tradeoffs in choosing a local community to live in. Other things being equal, which would you prefer to live in?

Housing Preference Segments: by REGION



OPINION STUDIES

Detailed Findings: Housing & Neighborhood Type Trade-offs

(Q3C6a&b)

The Housing Preference Segments are distinctly different by region and by demographics and priorities:

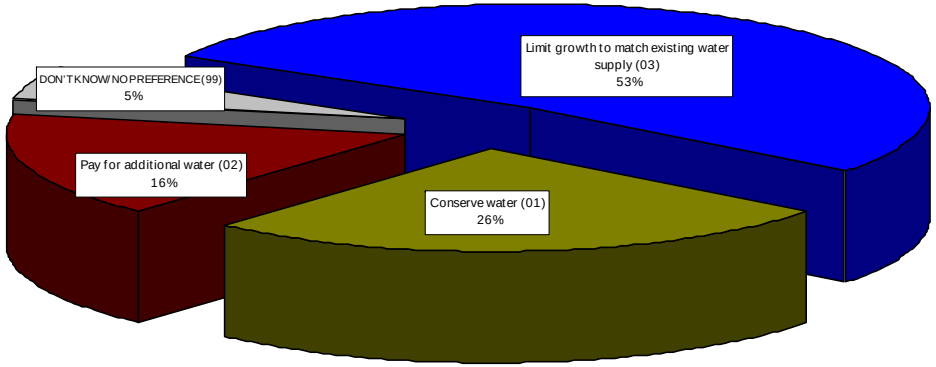
Segment Description	**Landowners** *(1-4)* **37%**	**Villagers** *(2-3)* **32%**	**Separatists** *(2-4)* **18%**	**Hybrids** *(1-3)* **13%**
Regions	More in South County More in North County	More in SLO City Some North Beaches Few North County	More in North County Few SLO City	More in SLO City Few North Beaches
Lifestage & Family	Mid age – kids and families, most married Large Households	Mix of very young and seniors, many widowed or single. More newcomers (<5 yrs)	Significantly Older Many widowed Smallest Households Fewer newcomers (<5 yrs)	Many very young Also middle age groups – later career
Income	Higher incomes	Lower incomes	Average Income - mixed	Average Income - mixed
Employment	Mix of employed full-time and retired	Many students	More retired Some Government & Educational employment	Employed full-time Largest proportion of students
Plannning Priorities	Affordable Housing 1st Others average	Affordable Housing 1st Walkable Communities relatively high priority Transportation relatively high priority	Affordable Housing 1st Housing near jobs relatively low priority	Affordable Housing 1st Housing Near Jobs relatively high priority Transportation relatively low
Perceived Quality-of-Life	Highest QOL Ratings	Moderate to high QOL	Moderate QOL	Lowest QOL ratings

OPINION STUDIES

Detailed Findings: Water Supply Management & Growth *(Q3C7)*

A majority of households prefer to limit growth to available water supplies, rather than to conserve or to pay for extra water so that more affordable housing could be created.

Q3C7. We have a limited water supply in San Luis Obispo County and a growing need for affordable housing. Which of the following options would you be more willing to accept in addressing these two shortages? Would you choose to:

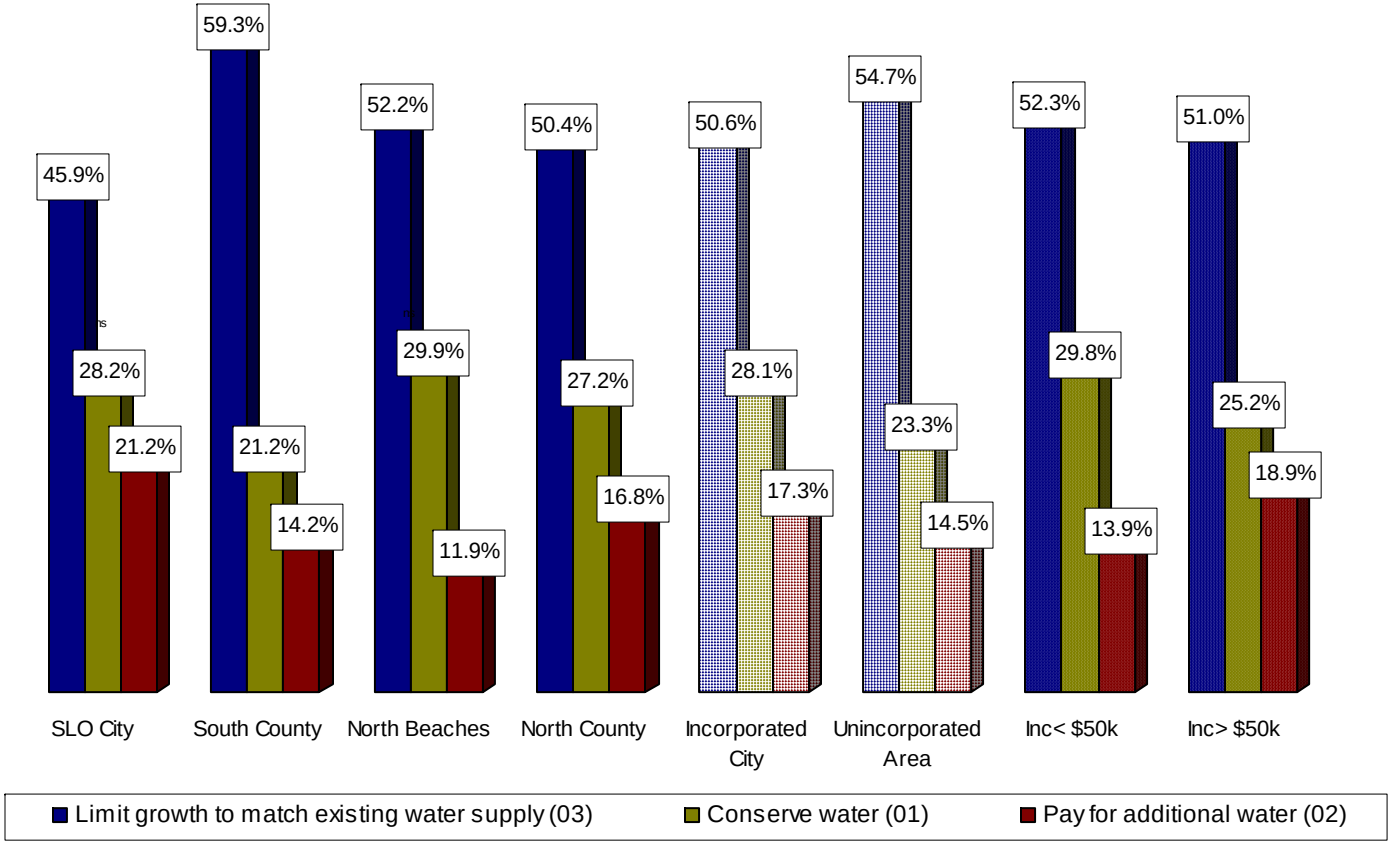


- Older residents (65+) are 50% more likely than younger (ages 18-44) to choose to limit growth. Younger households are much more willing to conserve water. Still, the preference for limited growth outpaces willingness to conserve even among these young households.
- Those for whom environment preservation is the top priority are among the most likely to say growth should be limited to available supplies.
- Regional differences across the county are not significant.

OPINION STUDIES

Detailed Findings: Water Supply Management & Growth *(Q3C7)*

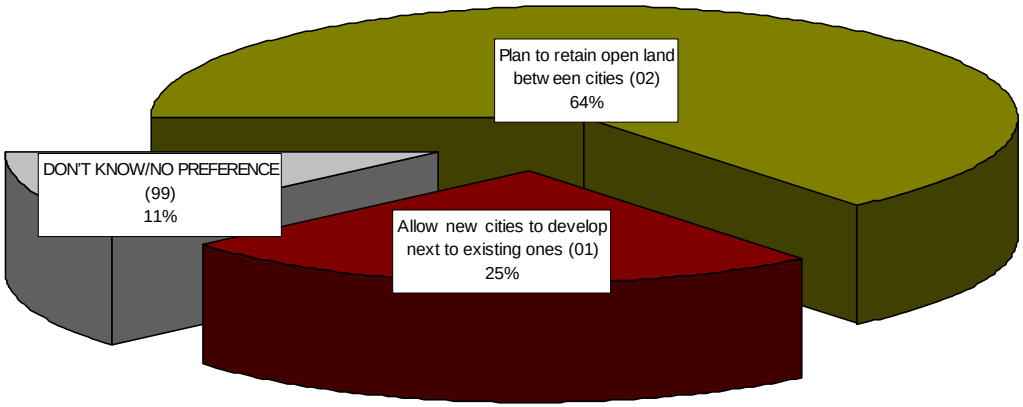
Q3C7. We have a limited water supply in San Luis Obispo County and a growing need for affordable housing. Which of the following options would you be more willing to accept in addressing these two shortages? Would you choose to:



Detailed Findings: Desire for Open Land between Cities *(Q3C8)*

Roughly two-thirds want to retain open land between cities rather than to allow cities to develop side-by-side.

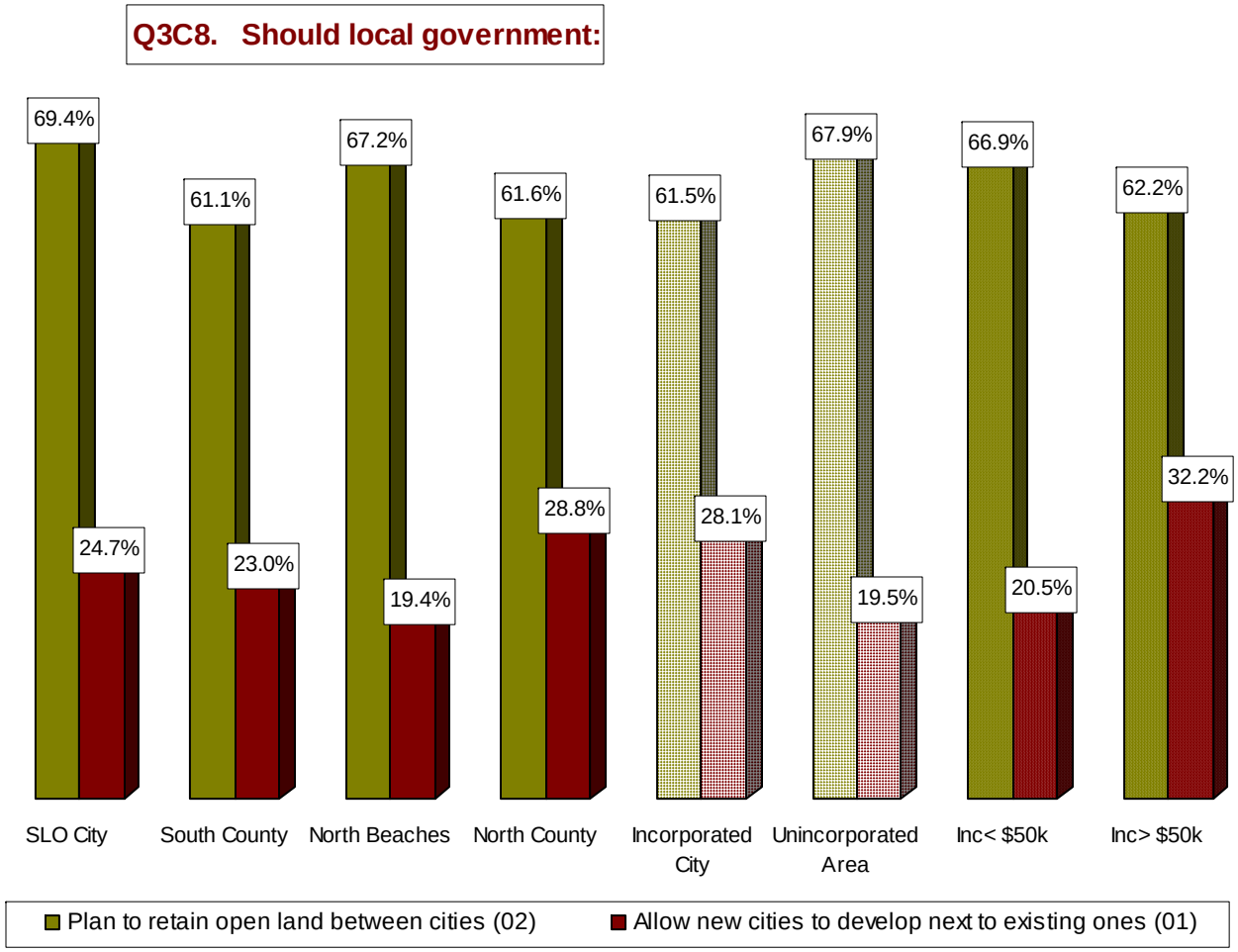
Q3C8. Should local government:



- Open-space between cities is valued by all demographic groups.
- However, those who place high priority on affordable housing or housing-near-jobs are more likely than others to say new cities should be allowed next to existing ones.
  - This same pattern is seen among newer residents (less than 5 years) and among families with children.

OPINION STUDIES

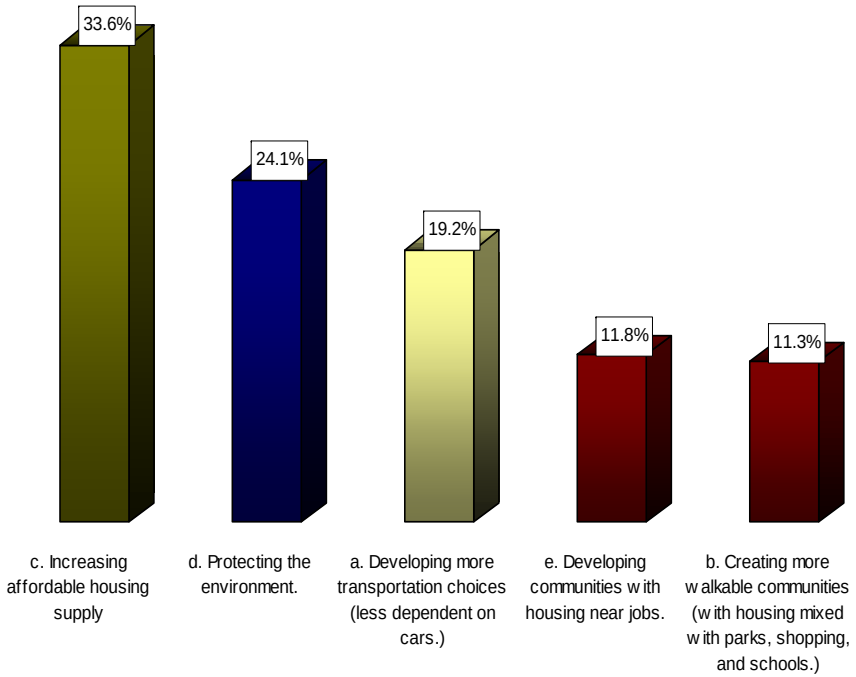
Detailed Findings: Desire for Open Land between Cities *(Q3C8)*



Detailed Findings: Priority of Various Issues in Planning *(Q3C9)*

Increasing the supply of affordable housing is the top-priority for most groups of county residents.

Q3C9 SUMMARY: County and city planning groups are asked to focus on many different issues. I am going to read a list of issues now facing planning groups. Please choose the one that you feel should be their HIGHEST priority?

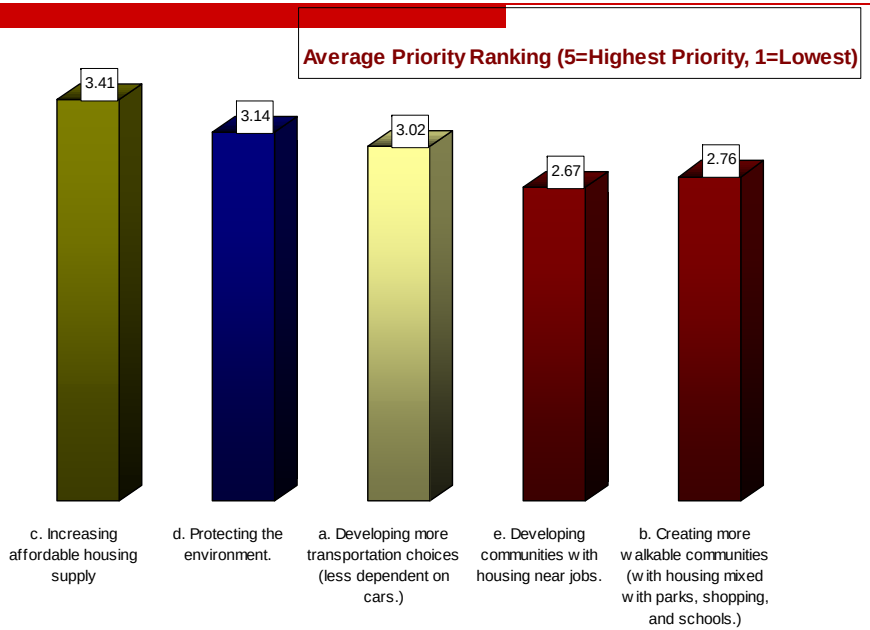


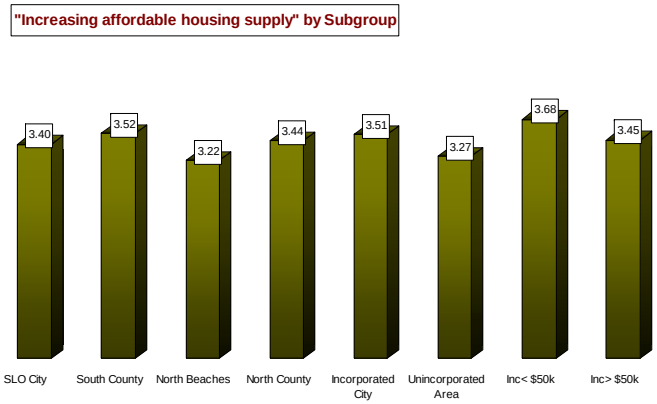
- Affordable housing receives the most "votes" as "highest" priority and also the highest mean or "average" ranking of the five possible priorities tested.
- Protecting the environment ranks as equally important in North Beaches and among those age 65+ and second in priority overall.

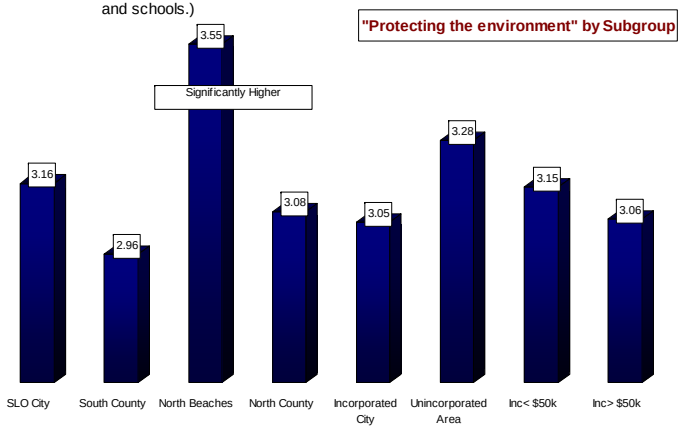
OPINION STUDIES

Detailed Findings: Priority of Various Issues in Planning *(Q3C9)*

Q3C9 SUMMARY: County and city planning groups are asked to focus on many different issues. I am going to read a list of issues now facing planning groups.







Detailed Findings: Priority of Various Issues in Planning *(Q3C9)*

Segment Description	**Landowners** *(1-4)* **37%**	**Villagers** *(2-3)* **32%**	**Separatists** *(2-4)* **18%**	Hybrids *(1-3)* **13%**
Highest Planning Priority(1)	Increasing affordable housing supply	Increasing affordable housing supply	Increasing affordable housing supply	Increasing affordable housing supply
2	Protecting the environment	Protecting the environment	Protecting the environment	Protecting the environment
3	Developing more transportation choices	Developing more transportation choices *(tie w/environment)*	Developing more transportation choices	Developing communities with housing near jobs
4	Developing communities with housing near jobs	Creating more walkable communities	Creating more walkable communities	Developing more transportation choices
Lowest planning Priority (5)	Creating more walkable communities	Developing communities with housing near jobs	Developing communities with housing near jobs	Creating more walkable communities *(tie w/transport)*

OPINION STUDIES

The CountyTRAK Survey: San Luis Obispo County

Third Quarter - 2005

Custom Report Prepared for:

San Luis Obispo County

Planning and Building Department

OPINION STUDIES

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OPINION STUDIES

About CountyTRAK ...

- The CountyTRAK Survey is a special project that allows participating companies and organizations to conduct professional-quality marketing research at a lower cost than custom research.
  - Participants share the cost of implementing the survey and of asking common questions, such as demographics. Each submits custom questions to be administered along with other participants' questions. Findings to custom questions are proprietary to participant.
- A form of syndicated, omnibus research, the survey is fielded quarterly by Opinion Studies across a random sample of San Luis Obispo County households.

For further information on the CountyTRAK, or to participate, contact Robyn Letters or Melanie Rys at (805) 549-0367.

OPINION STUDIES

Methodology

- A telephone survey of approximately 400 households distributed by population across four main San Luis Obispo County regions:
  - San Luis Obispo City
  - South County
  - North Beaches
  - North County
- Interviews completed between September 20 and October 2, 2005 by professional interviewers.
- Sampling furthered controlled by sex, age, ethnicity, and education to ensure proper representation of the SLO market.
- Respondents are, heads-of-household, English or Spanish speaking, aged 18 years or older.
- Margin of error for the total sample is less than 5%.

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Third Quarter - 2005

APPENDICES for:

San Luis Obispo County

Planning & Building Department

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COUNTY MAP: Regional Divisions

San Luis Obispo County

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Specific Cities/Zip Codes by Region

San Luis Obispo (city)	South County	North Beaches	North County
93401	93420 Arroyo Grande	93402 Los Osos	93422 Atascadero
93405	93433 Grover Beach	93424 Avila Beach	93423 Atascadero
93406	93483 Grover Beach	93428 Cambria	93432 Creston
	93444 Nipomo	93430 Cayucos	93446 Paso Robles
	93445 Oceano	93435 Harmony	93453 Rinconada
	93449 Pismo Beach	93442 Morro Bay	93453 Santa Margarita
		93452 San Simeon	93465 Templeton
			93447 Paso Robles
			93451 San Miguel
			93461 Shandon

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About CountyTRAK ...

- The CountyTRAK Survey is a special project that allows participating companies and organizations to conduct professional-quality marketing research at a lower cost than custom research.
  - Participants share the cost of implementing the survey and of asking common questions, such as demographics. Each submits custom questions to be administered along with other participants' questions. Findings to custom questions are proprietary to participant.
- A form of syndicated, omnibus research, the survey is fielded quarterly by Opinion Studies across a random sample of San Luis Obispo County households.

For further information on the CountyTRAK, or to participate, contact Robyn Letters or Melanie Rys at (805) 549-0367.

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Methodology

- A telephone survey of approximately 400 households distributed by population across four main San Luis Obispo County regions:
  - San Luis Obispo City
  - South County
  - North Beaches
  - North County
- Interviews completed between September 20 and October 2, 2005 by professional interviewers.
- Sampling furthered controlled by sex, age, ethnicity, and education to ensure proper representation of the SLO market.
- Respondents are, heads-of-household, English or Spanish speaking, aged 18 years or older.
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