Awareness & Perceptions Study

April 2014

LUTH research

Agenda

Objectives & Methodology

Detailed Findings

- Awareness & Behavior
- Attitudes & Perceptions
- Chula Vista Bayfront Master Plan
- Marketing & Communication Channels

Recommendations

Objectives & Methodology

Objectives

Awareness

- To gauge awareness of Chula Vista and its assets, including the Sleep Train Amphitheater, Olympic Training Center, Living Coast Discovery Center, Chula Vista Marina and others

Perceptions

- To understand perceptions of Chula Vista overall and association with specific communities
- To determine key motivations for/ barriers to visiting Chula Vista

Communication

- To identify media outlets used for finding information about San Diego County destinations

Methodology

Quantitative online survey

Length = 10 minutes

Fieldwork Dates

February 12, 2014 to February 24, 2014

Screening Criteria

Ages 18+

Residents of San Diego County (excluding Chula Vista)

Sample Design/ Quotas

N=417 Total
(MOE +/- 4.8%)

Min N=50 per San Diego Region
(MOE +/- 13.8%)

Detailed Findings

- Awareness & Behavior -

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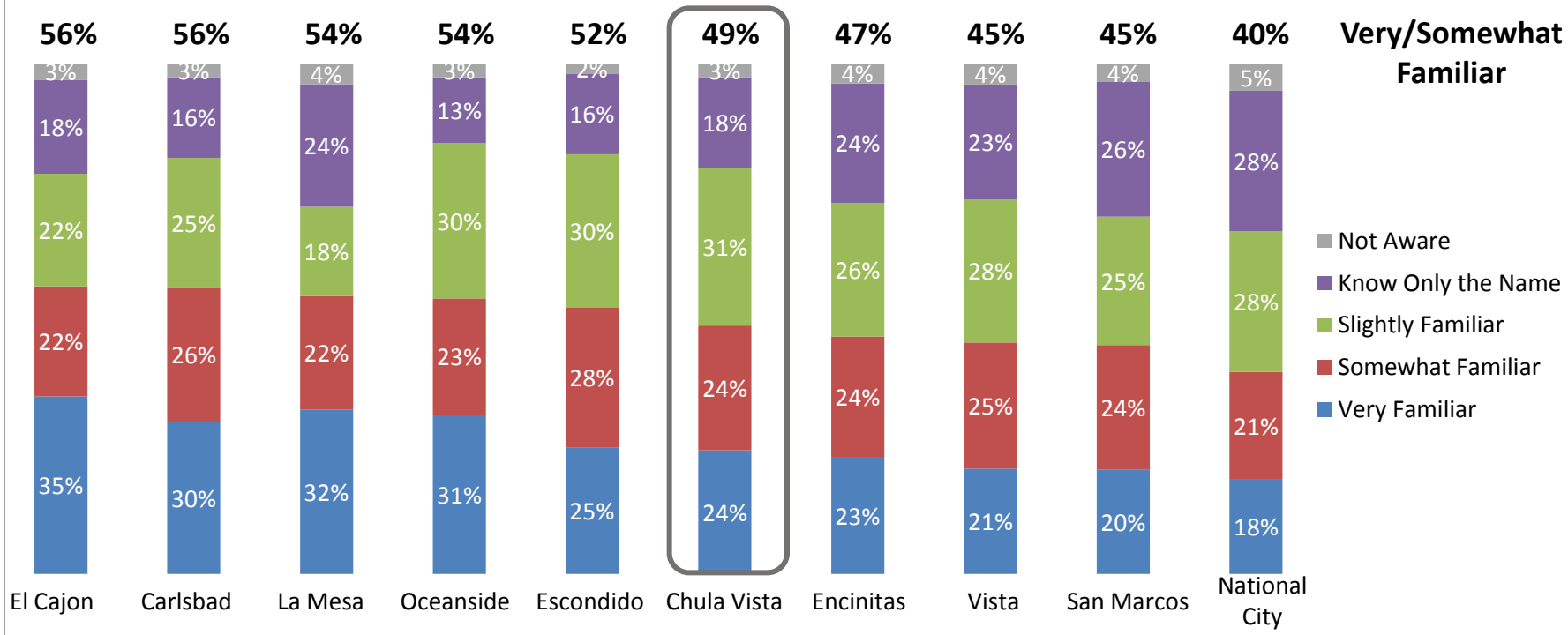
Awareness of Cities in SD County

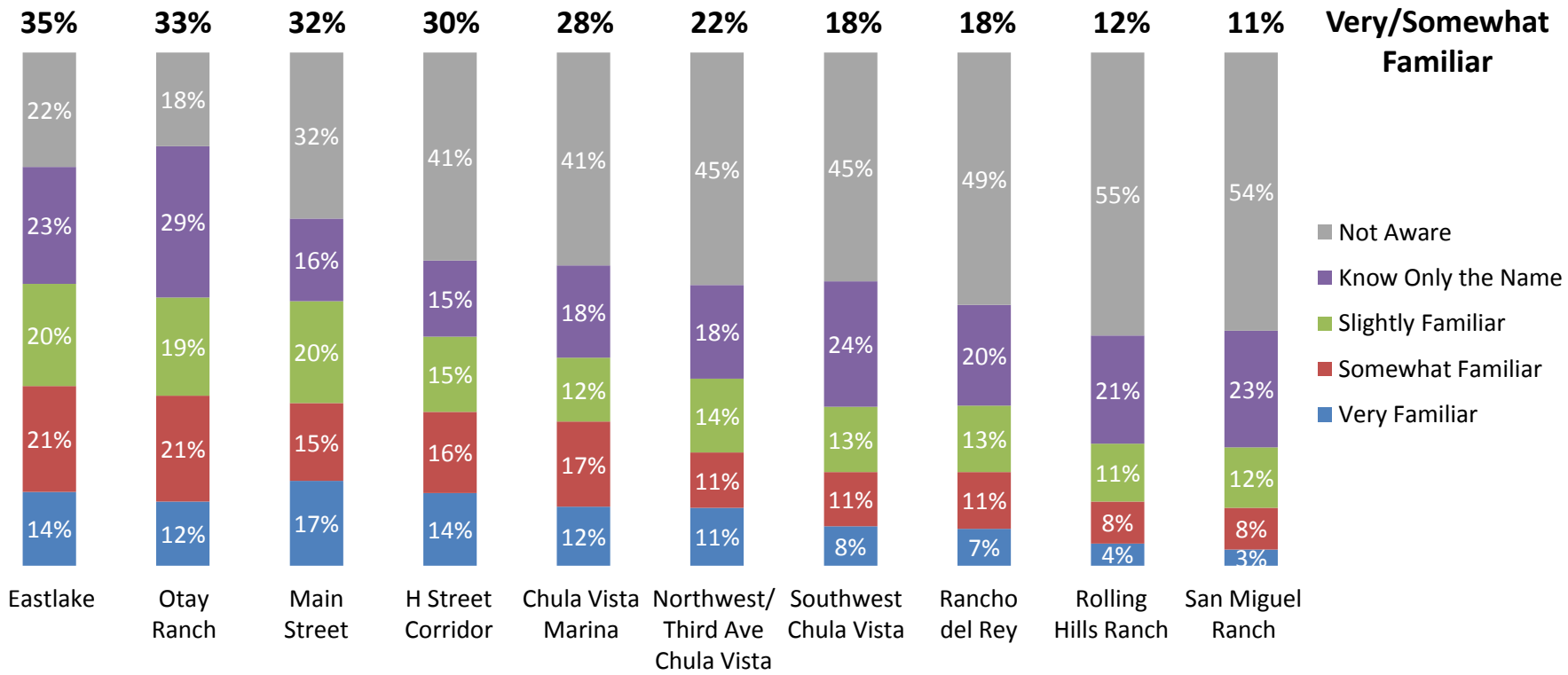
- Just under half (49%) of San Diego County residents say they are very/somewhat familiar with Chula Vista, ranking it sixth among the ten major cities/regions in San Diego County outside the city of San Diego.
- Familiarity with Chula Vista is significantly higher among Hispanics, those who live in the city of San Diego, and those in East County (54%-63%). It is also higher among those with a positive perception of the city, implying a positive correlation between a person's sentiments and their knowledge/experience with Chula Vista.
- Chula Vista has the highest percentage of San Diego County residents who said they are "slightly familiar" (31%), as compared to other cities evaluated. Non-Hispanics and older residents (55+) are more likely to fall within this category (35% and 38% respectively). Those who have lived in San Diego for less than 10 years, as well as those who live in North County Coastal and North County Inland are most likely to say they only know the name (29%-33%).



Q1. How familiar are you with the following cities within San Diego County?
Base size = Total Respondents (n=417) | Parts may not add up to the sum due to rounding

Awareness of Chula Vista Communities

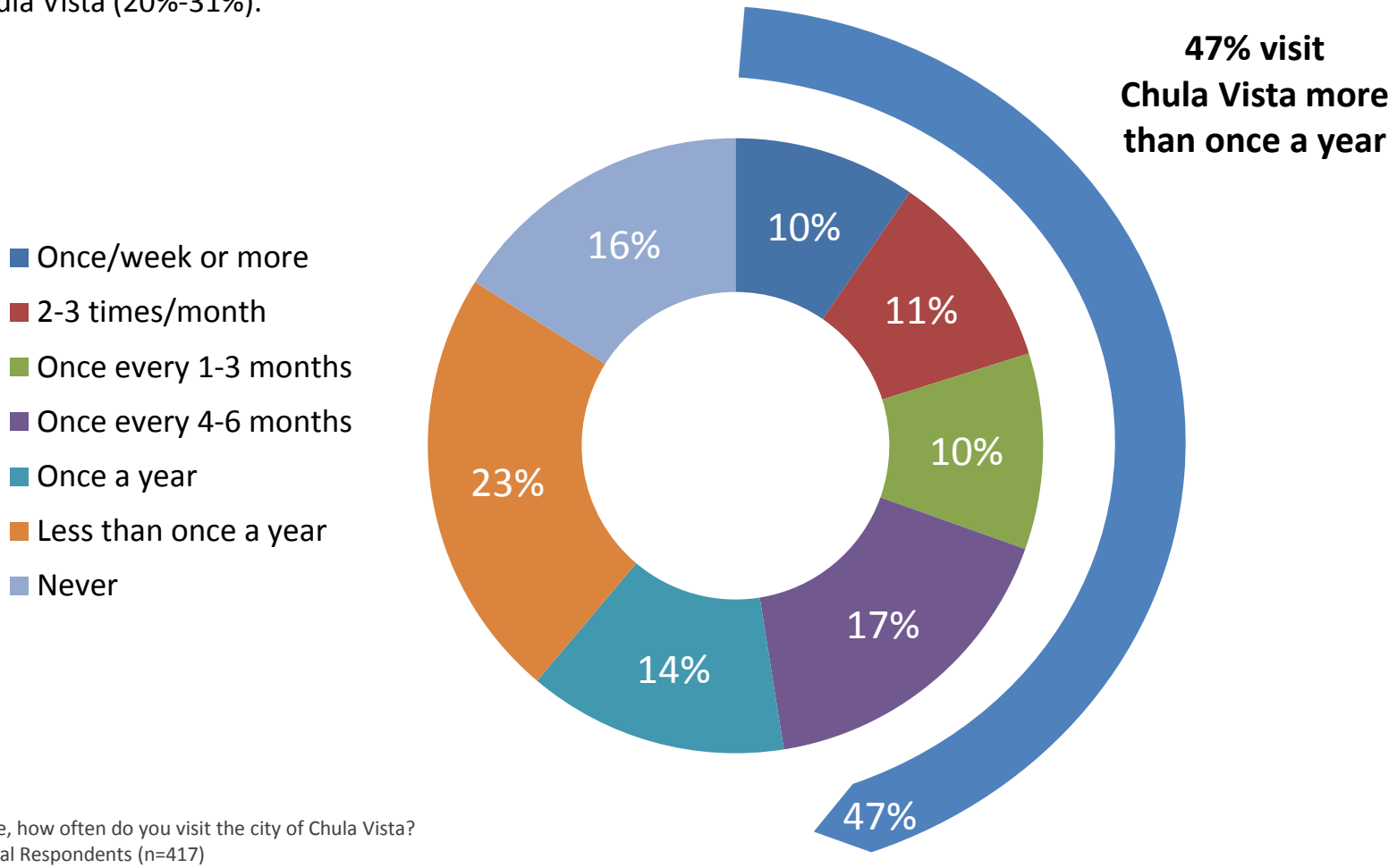
- Within the city of Chula Vista, San Diego County residents are most familiar with the neighborhoods of Eastlake (35%), Otay Ranch (33%) and Main Street (32%).
- While there is low awareness of communities such as Rolling Hills Ranch and San Miguel Ranch (11%-12%), younger adults (18-34) and residents with children in the household say they are more familiar with these lesser known communities than are their older counterparts without children (14%-19% vs. 7%-10%).
- Hispanic residents as well as those who live in the City of San Diego and East County are significantly more familiar with almost all of the Chula Vista communities than are Non-Hispanic residents and those in North County.



Q6. How familiar are you with the following towns/communities within Chula Vista?
Base size = Total Respondents (n=417)

Frequency of Visits to Chula Vista

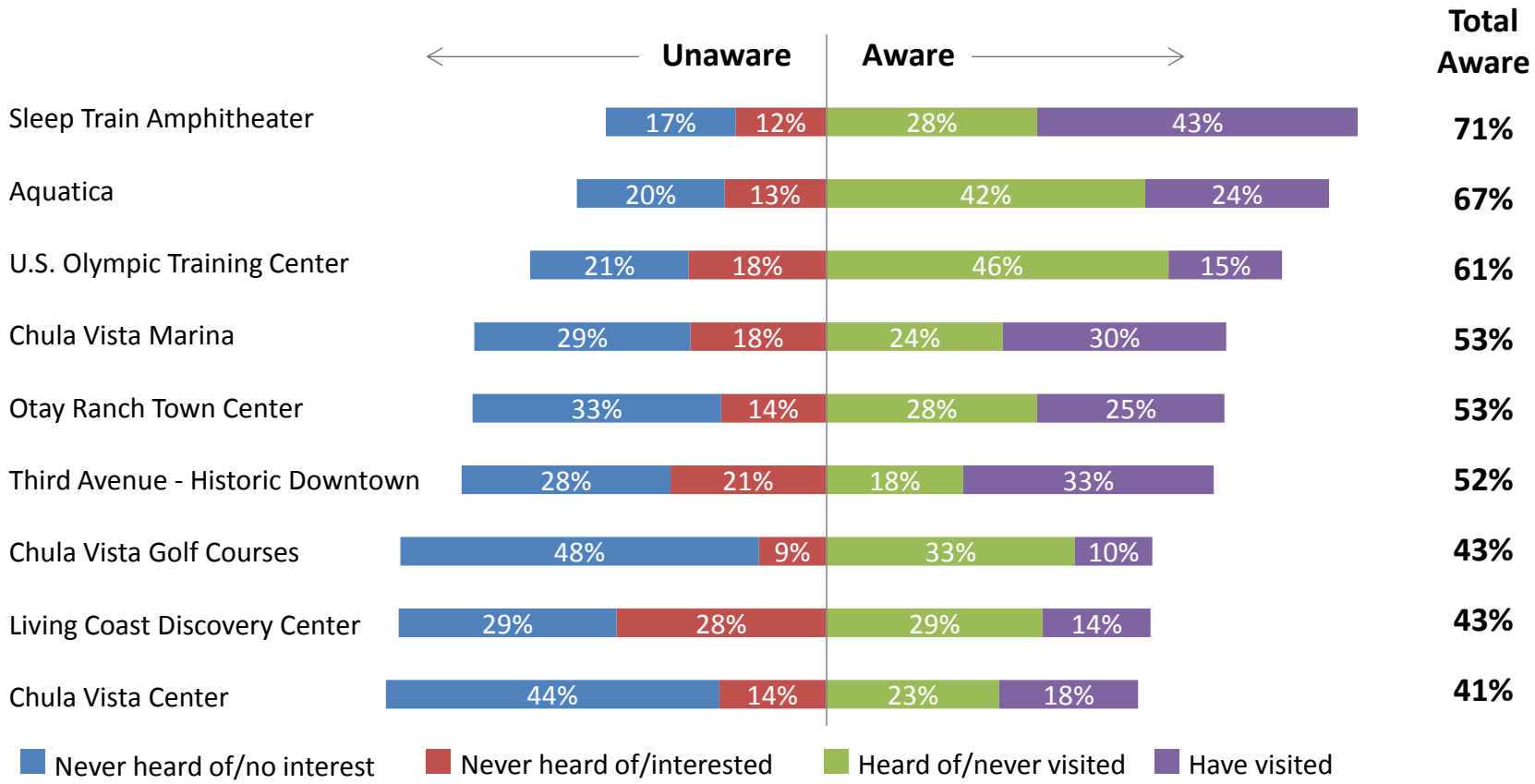
- Overall, less than half of San Diego County residents (47%) say they visit Chula Vista more than once a year. The majority say they visit once a year or less (53%). one out of six overall saying they never visit (16%).
- On average, those who visit Chula Vista say they visit 12 times a year. Those who visit significantly more often include Hispanics (22 times/year), City of SD residents (16 times/year), those with children in the HH (15 times/year), and 18-34 year olds (14 times/year).
- Females, residents of less than 10 years and North County residents are more likely to say they never visit Chula Vista (20%-31%).



Q4. On average, how often do you visit the city of Chula Vista?
Base size = Total Respondents (n=417)

Awareness of Chula Vista Attractions

- More than six out of ten San Diego County residents say they are aware of the Sleep Train Amphitheater (71%), Aquatica (67%) and the U.S. Olympic Training Center (61%). The most frequented attractions are the Sleep Train Amphitheater (43%), Third Avenue Historic Downtown (33%) and the Chula Vista Marina (30%).
- While approximately a quarter of San Diego County residents (21%-28%) say they were not previously aware of the Living Coast Discovery Center and Third Avenue Historic Downtown District, they would be interested in visiting, indicating a clear opportunity to promote these destinations. This is specifically true when it comes to North County Inland residents, who show significant interest in 5 of the 9 attractions – Living Coast Discovery Center, Third Avenue Historic Downtown, Chula Vista Marina, Sleep Train Amphitheater, and Aquatica (19%-37%).



Q8. For each of the following, please select the option that most accurately describes your experience with each attraction located in Chula Vista.
Base size = Total Respondents (n=417)

Top Reasons for Visiting Chula Vista

- Most say they travel to Chula Vista to visit family and friends (39%), as well as for the shopping and dining experiences (25%-34%). East County residents are more likely to visit Chula Vista for family and friends (45%), while residents of the City of San Diego are more likely to go for the shopping and dining (42% and 29% respectively), as compared to other regions. North County Inland residents, however, are more likely than other residents to visit tourist attractions and venues (16%).
- Specific groups say they visit team sports facility/fields, including those with kids in the household, higher income residents ($100K+) and males (11%-16%). Younger adults (18-34) say they are more likely to visit and enjoy the natural landscape, tourist attractions, and hiking/biking/ walking than their older counterparts.

Reasons for Visit

39%	Visit friends/family
34%	Shopping
25%	Dining
21%	Entertainment
18%	Work/Business

Q5. What is your primary reason(s) for visiting Chula Vista?
Base size = those who visit Chula Vista (n=350) | 3%+ shown only

Detailed Findings

- Attitudes & Perceptions -

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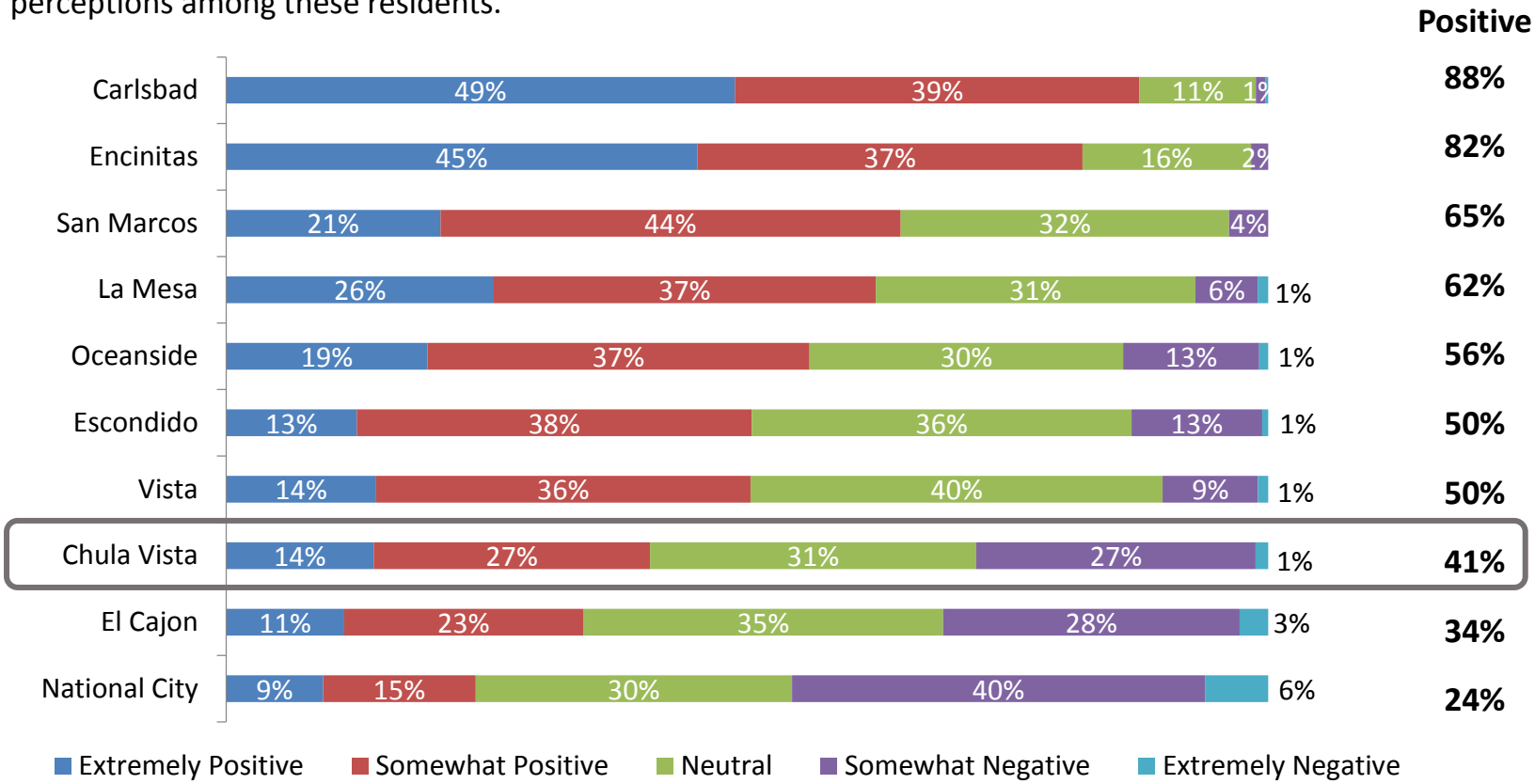
Perceptions of San Diego Cities

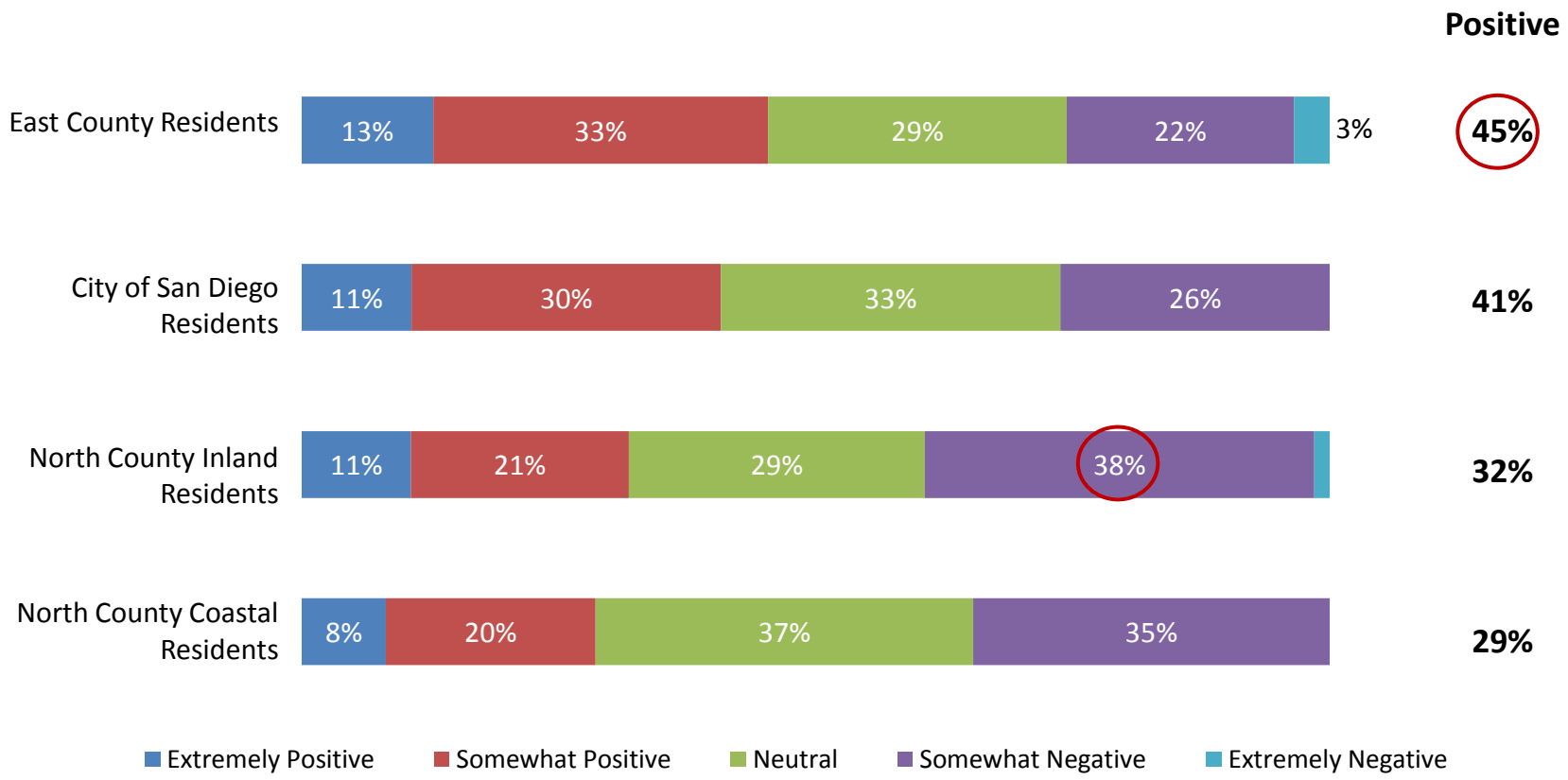
- Overall, four out of ten San Diego County residents say they have a positive perception of Chula Vista (41%), placing the city eighth in the rankings among the ten San Diego cities evaluated.
- Hispanics, lower income residents, and East County residents are more likely to express positive opinions of the city (45%-59%), while Non-Hispanics, higher income residents and North County Inland residents are more likely to say that their perceptions of Chula Vista are somewhat negative (30%-38%).
- It is important to note, however, that the highest percentage (approximately a third) across most sub-groups say their opinion of Chula Vista is neutral, perhaps indicating a realistic opportunity to improve perceptions among these residents.



Q2. Please rate your overall perception of each of the following cities within San Diego County.
Base size = Based to those "slightly/somewhat/very familiar" with each city

Perceptions of Chula Vista (by region)

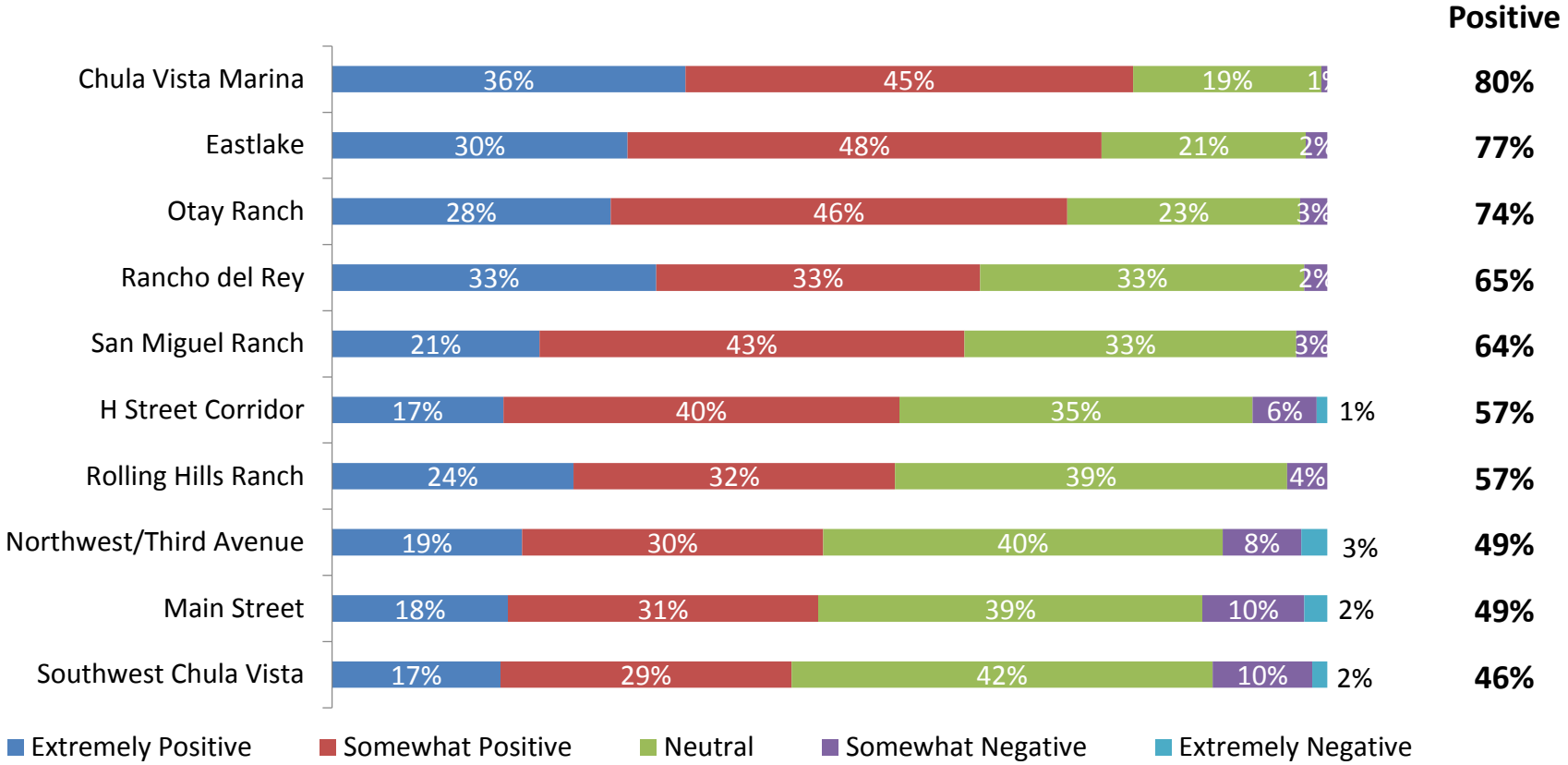
- Overall, East County residents have the highest perceptions of Chula Vista, with almost half saying their perceptions are positive (45%). This is significantly higher than that of North County Coastal residents, where less than a third say they have positive opinions of the city (29%).



Q2. Please rate your overall perception of each of the following cities within San Diego County.
Base size = Based to those "slightly/somewhat/very familiar" with each city | Data circled in red is significantly higher than other sub-group data.

Perceptions of Chula Vista Communities

- San Diego County residents have the most positive perceptions of the Chula Vista Marina (80%), Eastlake (77%), and Otay Ranch (74%). It is important to point out that the Chula Vista Marina scored highest in terms of perceptions despite it ranking fifth in terms of awareness (28% aware), indicating an asset for which increasing awareness could prove beneficial to the city of Chula Vista.
- Hispanics have significantly higher opinions of communities such as H Street Corridor, Rolling Hills Ranch, and Main Street (67%-69%). Specifically, Main Street is held in higher regard by 18-34 year olds and those who have lived in San Diego for less than 10 years (61% and 62% respectively). Rolling Hills Ranch, on the other hand, scores very well in terms of positive perceptions among North County Inland residents (78%).



Q7. Please rate your overall perception of each of the following towns/communities within Chula Vista.
Base size = Based to those "slightly/somewhat/very familiar" with each town/community

Top 5 Unaided Perceptions of Chula Vista

- When asked about their overall perceptions of Chula Vista, residents are most likely to cite the fact that the city is "growing/developing/has been revived" (13%). This is especially true among $100K+ residents, 10+ years residents, 35-54 year olds and residents of the City of San Diego (17%-20%).
- An equal number of residents say Chula Vista is a "nice/good/beautiful city" as those who say it is "unsafe with high crime" (12%). Males, Hispanics, lower income, and younger residents are all more likely to say that Chula Vista is a "nice/good/beautiful city" (19%-26%), while North County Coastal residents are most likely to describe Chula Vista as "unsafe with high crime" (21%).
- Top of mind perceptions also include Chula Vista being "close to the border" (11%) and having "appealing aspects, making it a good place to live/visit" (10%).

Growing / Developing / Has been revived	13%
Nice / Good / Beautiful city	12%
Unsafe / High crime	12%
Close to the border	11%
Appealing aspects / Good place to visit / live	10%

Q3. Now thinking just about Chula Vista, what is your overall opinion or perception of the city?
Base size = Total Respondents (n=417) | Green = positive, Blue = neutral, Red = negative

Unaided Perceptions of Chula Vista (4%+)

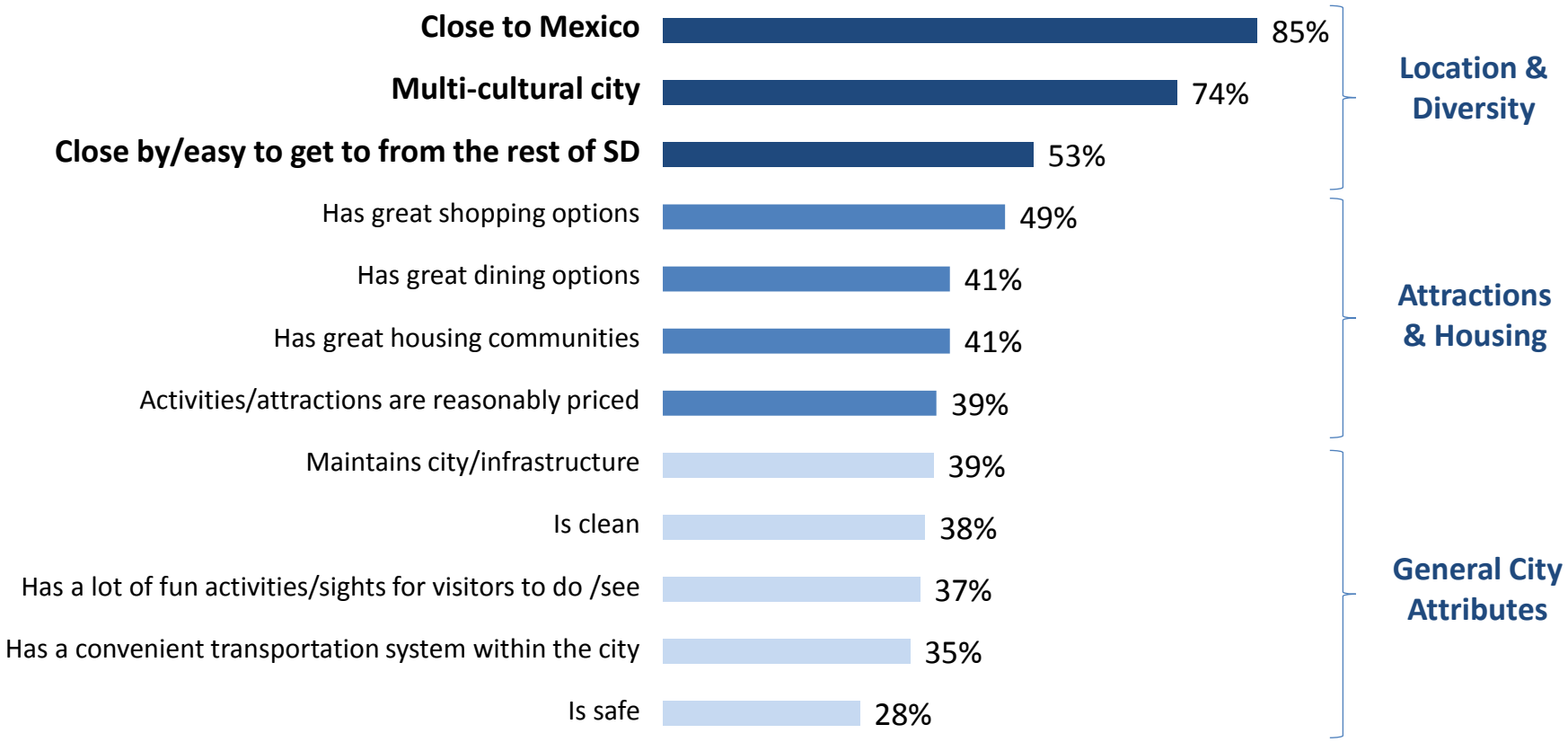
- Overall, unaided perceptions about the city of Chula Vista are split equally in terms of being positive, neutral, and negative. The most positive perception is that the city is "growing/developing/has been revived" (13%). The most negative being that it is "unsafe with high crime" (12%). Residents also mention the fact that the city is close to the border (11%), a perception that may be hard to change, but could potentially be minimized by shifting the focus to the fact that Chula Vista is very much a part of San Diego County and close by to the city of San Diego.

Positive		Neutral		Negative	
35%		**31%**		**35%**	
Growing / Developing / Has been revived	13%	Close to the border	11%	Unsafe / High crime	12%
Nice/Good/Beautiful city	12%	Good & bad areas (East is nice/new; West is poor/old)	7%	Low income / Poor	6%
Appealing aspects / Good place to visit/live	10%	Large Hispanic / Mexican influence	5%	Run down / Old / Needs upgrading	6%
Family oriented / Many housing developments	4%	Neutral/Average (non-specific)	6%	Crowded / Busy	5%
Positive (non-specific)	2%			Too far south / Out of the way	4%
				Negative (non-specific)	5%

Q3. Now thinking just about Chula Vista, what is your overall opinion or perception of the city?
Base size = Total Respondents (n=417) | 4%+ mentions shown, with the exception of "non-specific" responses

Aided Perceptions of Chula Vista

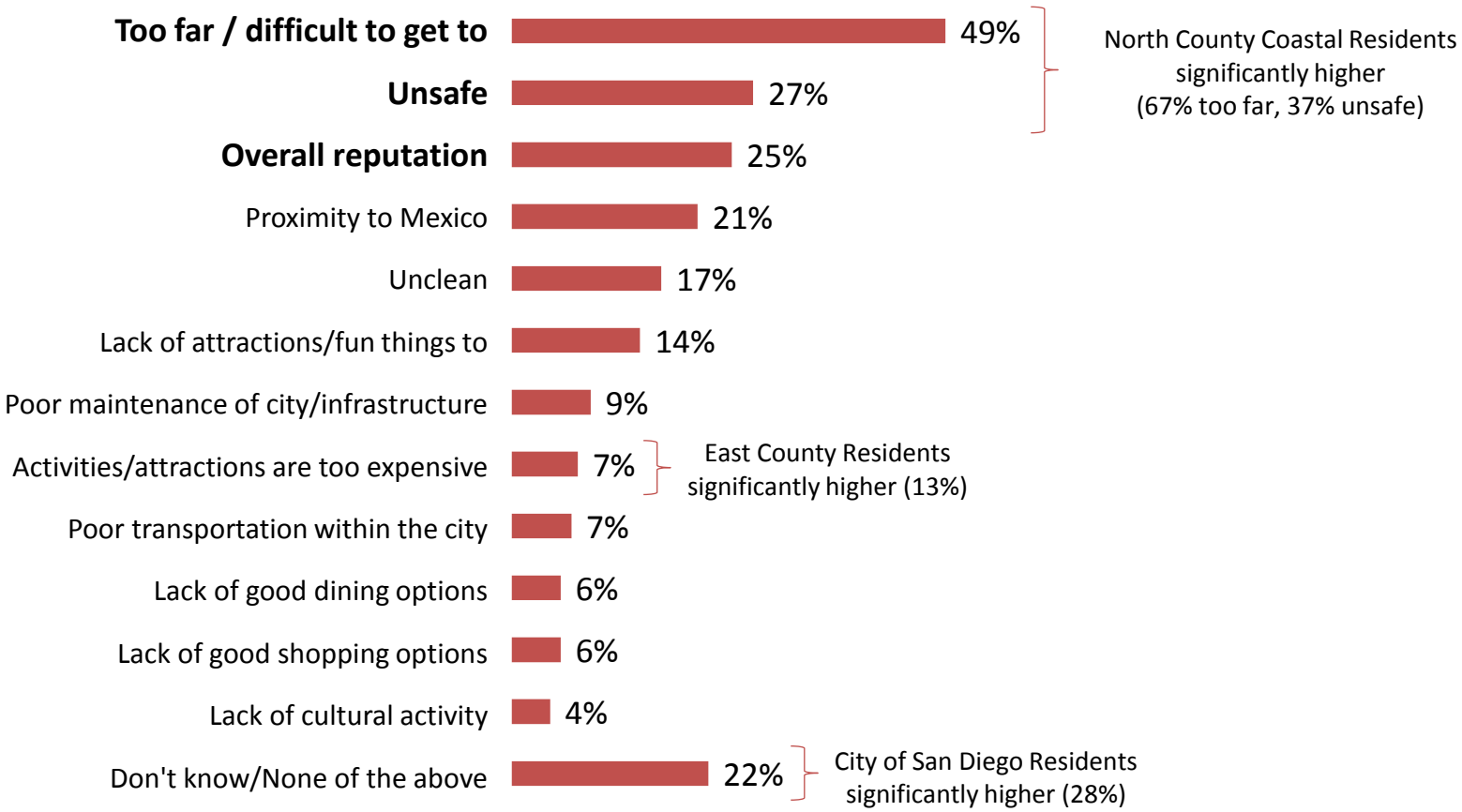
- When prompted, San Diego County residents are most likely to associate Chula Vista with its location and diversity, namely its proximity to Mexico (85%), the fact that it is a multi-cultural city (74%), and close by/easy to get to from the rest of San Diego (53%). Safety, transportation, and activities/sights for visitors all score lowest in terms of perceptions with Chula Vista (28%-37%), and therefore present areas of opportunity for improvement.
- Residents of East County rate Chula Vista highest on all attributes (34%-89%), while North County Coastal provide the lowest ratings across the board (28%-85%).



Q9. Please indicate how much you agree or disagree with each of the following statements about Chula Vista.
Base size = Total Respondents (n=417)

Aspects Preventing Visits to Chula Vista

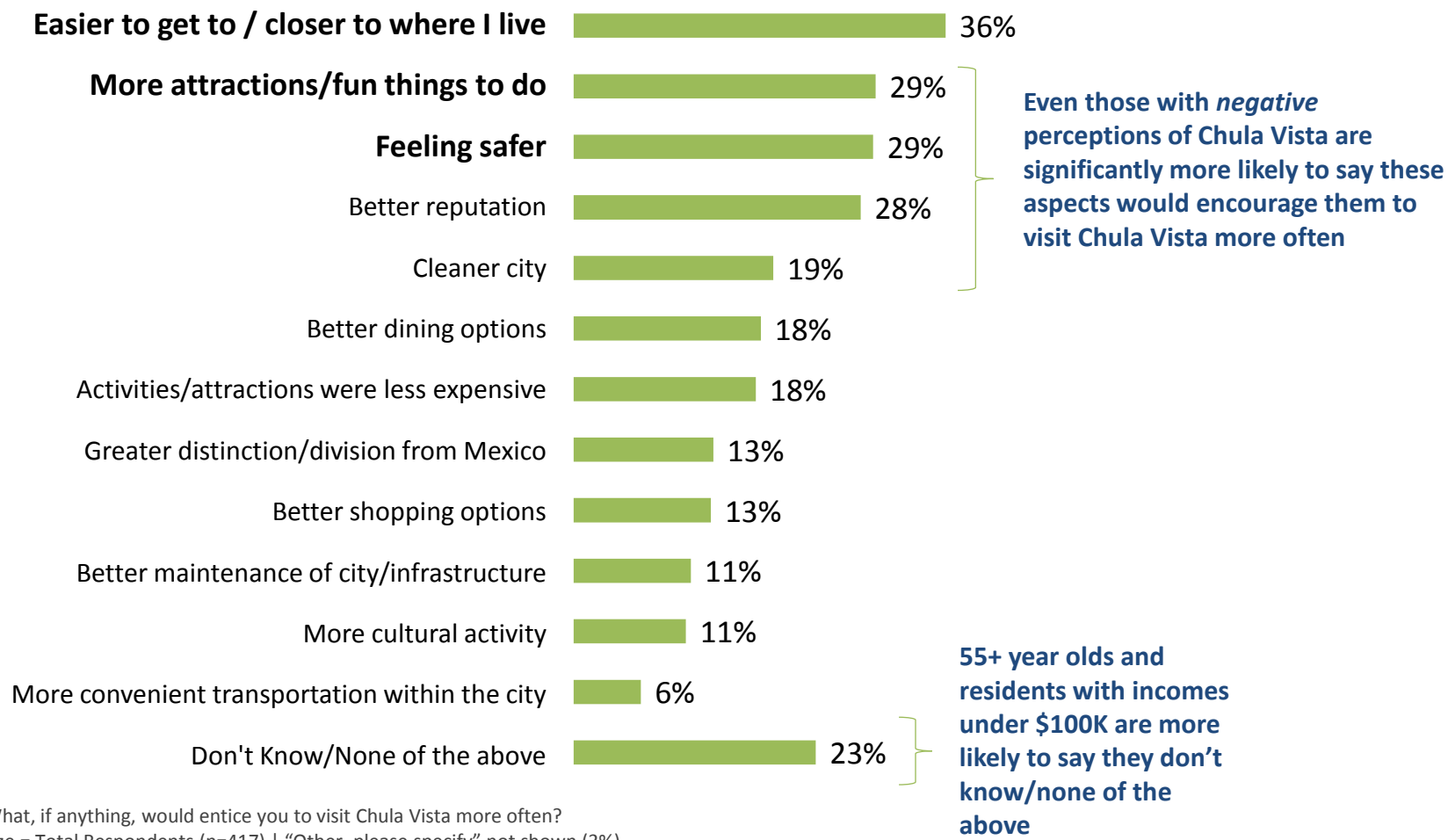
- Half of respondents say a major factor preventing them from visiting Chula Vista more often is the fact that it is too far and/or difficult to get to (49%). Not surprisingly then, one in five (21%) say its proximity to Mexico is also a deterrent. Approximately a quarter cite the fact that it is unsafe and its overall reputation as reasons that prevent them from going more often (27% and 25% respectively).
- North County Coastal residents point to the fact that Chula Vista is too far/difficult to get to and unsafe as to why they may not visit more often, while residents of East County say activities/attractions are too expensive.



Q10. Which of the following may prevent you from visiting Chula Vista more often?
Base size = Total Respondents (n=417) | "Other, please specify" not shown (6%)

Aspects that Would Entice More Visits

- A third of San Diego County residents say they would be more inclined to visit Chula Vista if it were easier to get to and closer to where they live (36%). This is in line with the top deterring factor to visiting the city – its perceived distance/difficulty of getting to.
- Over a quarter say if Chula Vista had more attractions and fun things to do, if it felt safer to be there, and if it had a better reputation, they may be more likely to visit. Specifically, residents of North County Coastal and Inland say if they felt safer, they would be more inclined to visit (35% and 34% respectively).



Q11. What, if anything, would entice you to visit Chula Vista more often?
Base size = Total Respondents (n=417) | "Other, please specify" not shown (3%)

Detailed Findings

- Chula Vista Bayfront Master Plan -

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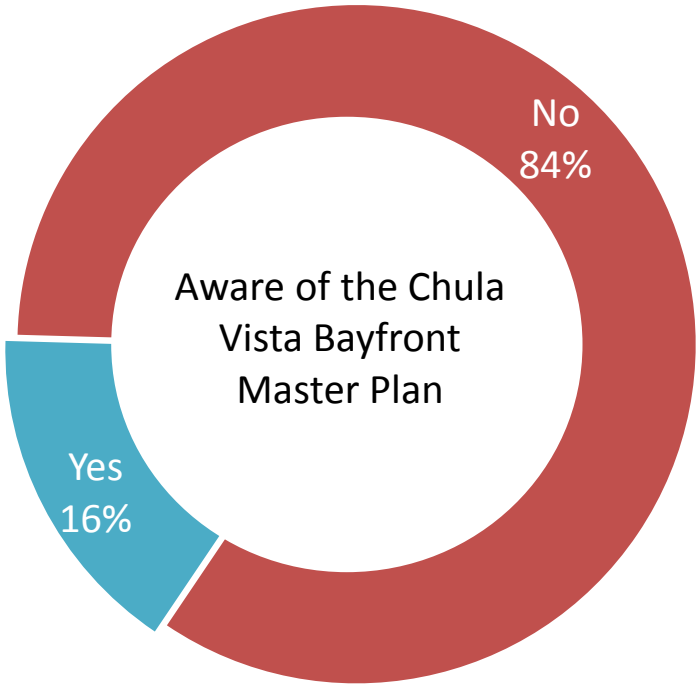
Chula Vista Bayfront Master Plan

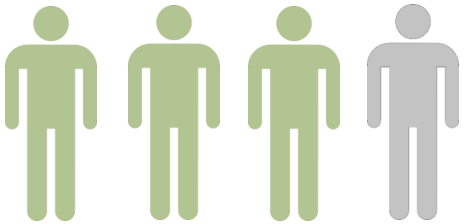
- One out of six San Diegans say they were aware of the Chula Vista Bayfront Master Plan (16%), while the majority report that they were unaware of the development (84%). Greater awareness exists among those East County Residents, 35+ years old and 10+ year residents (18%-24%).
- Despite low awareness, three out of four believe the development is an opportunity to create another vibrant destination on the San Diego Bay for residents and visitors. This is specifically true among higher income residents ($100K+) at 82% agreement.



3 out of 4

agree that

The Chula Vista Bayfront Master Plan is an opportunity to create another vibrant destination on San Diego Bay for residents and visitors



Q12. Are you aware of the Chula Vista Bayfront Master Plan?
Q13. Please indicate how much you agree or disagree with the following statement.
Base size = Total Respondents (n=417)

Detailed Findings

- Marketing & Communication Channels -

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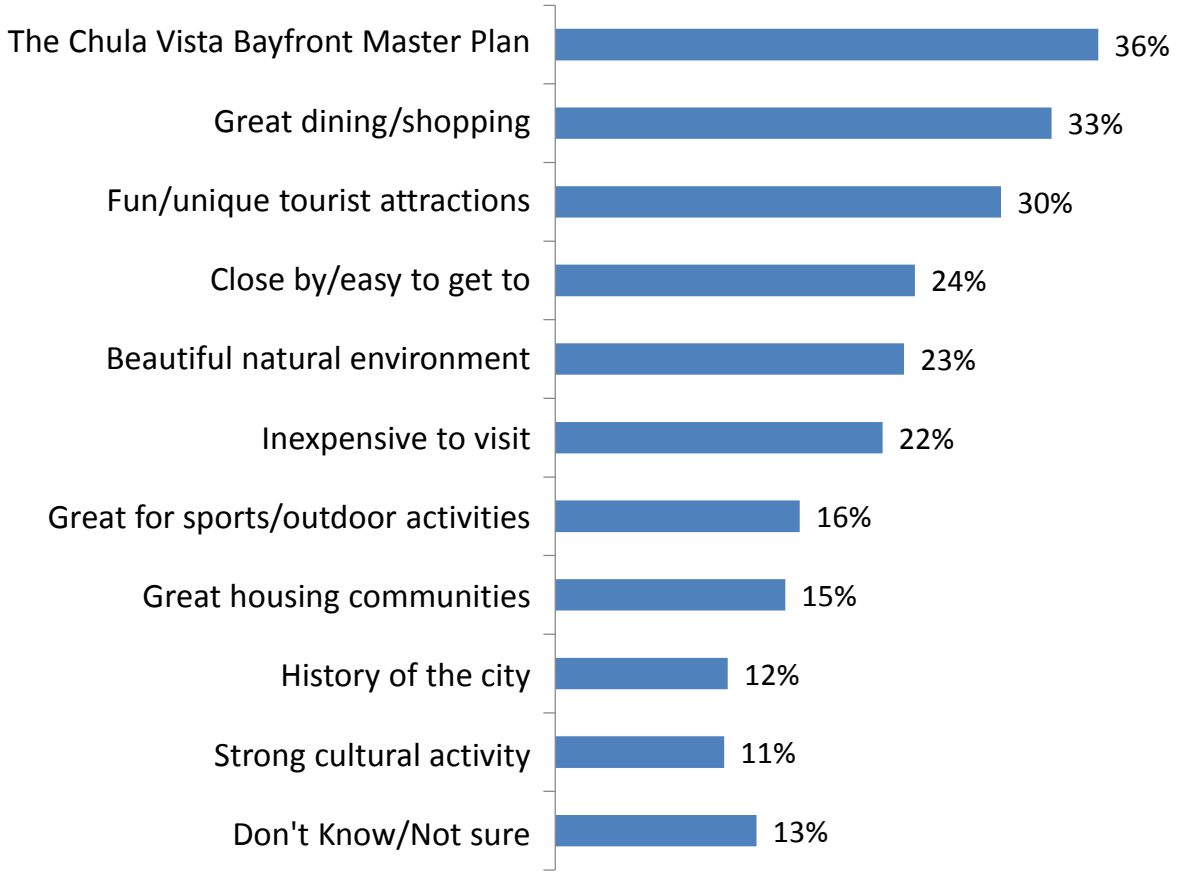
Aspects of Chula Vista to Promote

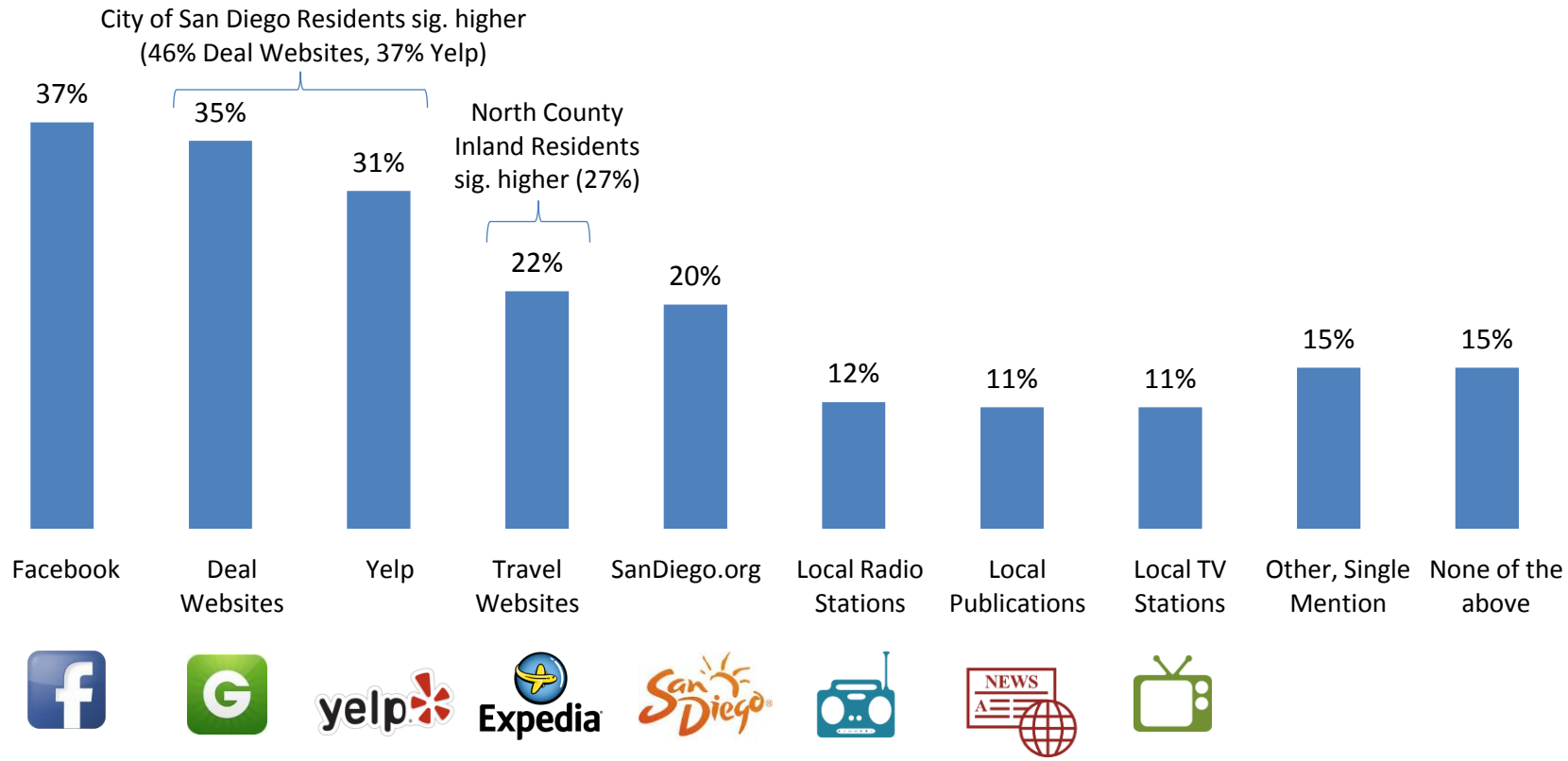
- In terms of the aspects of Chula Vista that residents believe should be emphasized most, the Bayfront Master Plan took precedence with over a third saying this should be promoted to San Diegans (36%). Residents also believe the great dining/shopping options (33%), fun/unique tourist attractions (30%) and the fact that Chula Vista is close by/easy to get to (24%) should be highlighted.
- Conversely, residents feel aspects such as the city's strong cultural activity, history, and great housing communities should be emphasized least.



Q15. In your opinion, which of the following aspects of Chula Vista should be emphasized most to the residents of San Diego County in 2014?
Base size = Total Respondents (n=417)

Most Utilized Communication Channels

- The Internet is by far the most utilized method of finding out information about activities and things to do in San Diego County. Facebook ranks number one with 37% usage, followed by deal websites, Yelp, travel websites, and SanDiego.org – all of which are used by at least one in five residents.
- 18-34 year olds, higher income residents, Hispanics and residents of less than 10 years are all significantly more likely to use the Internet to find out what is happening in San Diego.
- The more traditional means of communication – radio, local publications and local TV stations – are less utilized overall; however, those who have lived in San Diego 10+ years are significantly more likely to use all three of these mediums than their newer counterparts.



Q14. Which of the following do you primarily use to find out information about activities/things to do in San Diego County?
Base size = Total Respondents (n=417) | 11%+ shown only

Recommendations

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Recommendations

1

Convey that Chula Vista is easy to get to & close to home.

Recommendations

Top Perceptions	
Close to Mexico	85%
Multi-cultural city	74%
Close by / easy to get to	53%

Top Deterrents	
Too far / difficult to get to	49%
Unsafe	27%
Overall reputation	25%

Top Appeals	
Easier to get to / closer to where I live	36%
More attractions / fun things to	29%
Feeling safer	29%

- **Marketing initiatives should actively seek to minimize the perception of Chula Vista being far away/difficult to get to by communicating the proximity of the city to the rest of San Diego, as well as the ease of getting there.**

"Only minutes from downtown San Diego"

"Right off the 5/805"

Recommendations

2

Promote attractions and fun things to do.

Recommendations

- Promote top reasons for visiting San Diego – namely visiting family and friends as well as great shopping and dining options – which currently draw in at least a quarter of San Diego residents.

- Continue to highlight top attractions, such as the Sleep Train Amphitheater – leading destination with high awareness and visitation.

SLEEP TRAIN AMPHITHEATRE

- Draw attention to the Third Avenue Historic Downtown District and Living Coast Discovery Center – both of which pique higher interest among San Diegans upon learning about these attractions.

THIRD AVENUE VILLAGE CHULA VISTA

Living Coast DISCOVERY CENTER
San Diego Bay at Chula Vista

Recommendations

3

Improve perceptions of safety and reputation.

Recommendations

Top Deterrents	
Too far / difficult to get to	49%
Unsafe	27%
Overall reputation	25%

Top Appeals	
Easier to get to / closer to where I live	36%
More attractions / fun things to	29%
Feeling safer	29%

- **Work to improve San Diego residents' perceptions of Chula Vista as a safe place to live and visit, implementing marketing programs that accurately portray the city's high safety record.**

- **Increase awareness around communities where perceptions are high, but awareness is low – Chula Vista Marina, Rancho del Rey, Rolling Hills Ranch & San Miguel Ranch; raise awareness of the Bayfront Master Plan.**

- **Review what other communities in San Diego have done, such as North Park and La Mesa, to revitalize their perceptions and drive visitation to their restaurants and shopping outlets.**

Recommendations

4

Communicate the message.

Recommendations

- **Target specific groups among whom awareness, perceptions and visitation to Chula Vista are noticeably low.**

  Create targeted messages for North County Inland residents, who are significantly more likely to visit tourist attractions and venues than residents of other regions.

Facebook	37%
Groupon	35%
Yelp	31%
Expedia	22%
San Diego	20%

- **Allocate resources primarily to internet-related marketing, PR and advertising initiatives.**

  Facebook posts, events and advertising should take priority, as over a third utilize this medium for finding out activities/things to do in San Diego.

  Deal websites and Yelp should be used to reach the residents of San Diego City. Travel websites should be used to target North County Inland residents.

Thank You

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Appendix

- Respondent Profile -

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Respondent Profile

	Total	Gender		Age			Household Income			Ethnicity	
	Total	Male	Female	18-34	35-54	55+	<$50K	$50K-$100K	$100K+	Hispanic	Non-Hispanic
Base Size	417	166	251	156	141	120	171	133	92	115	300
Gender											
Male	40%	100%	-	40%	40%	39%	37%	40%	48%	**68%**	29%
Female	60%	-	100%	60%	60%	61%	63%	60%	52%	32%	**71%**
Age											
18 to 24 years of age	12%	12%	11%	31%	-	-	15%	10%	9%	**19%**	9%
25 to 34 years of age	26%	26%	26%	69%	-	-	28%	26%	25%	**38%**	21%
35 to 44 years of age	17%	17%	17%	-	50%	-	12%	**23%**	17%	18%	17%
45 to 54 years of age	17%	16%	17%	-	50%	-	16%	14%	**26%**	10%	**19%**
55 to 64 years of age	18%	19%	18%	-	-	64%	20%	17%	15%	11%	**21%**
65 years or older	10%	10%	11%	-	-	36%	9%	11%	8%	3%	**13%**
Mean	43.56	43.22	43.77	26.88	**44.46**	**64.16**	42.33	43.52	43.55	36.30	**46.26**

Bold red data indicates significantly higher data among sub-groups.

Respondent Profile

	Total	Gender		Age			Household Income			Ethnicity	
	Total	Male	Female	18-34	35-54	55+	<$50K	$50K-$100K	$100K+	Hispanic	Non-Hispanic
Base Size	417	166	251	156	141	120	171	133	92	115	300
Region											
North County Coastal	18%	15%	20%	19%	12%	**23%**	17%	18%	16%	9%	**21%**
North County Inland	25%	29%	23%	22%	30%	23%	26%	25%	24%	**33%**	22%
City of San Diego	28%	30%	26%	32%	25%	25%	23%	29%	**39%**	29%	27%
East County	22%	20%	24%	19%	25%	23%	25%	23%	16%	18%	24%
South Bay	7%	6%	8%	7%	8%	6%	9%	6%	4%	**11%**	5%
Ethnicity											
White or Caucasian	58%	42%	**68%**	38%	**62%**	**77%**	46%	**68%**	**62%**	-	80%
Hispanic or Latino	28%	**47%**	15%	**42%**	**23%**	13%	**36%**	19%	26%	100%	-
Asian or Pacific Islander	6%	2%	**9%**	**12%**	**6%**	0%	6%	7%	7%	-	9%
Black or African-American	5%	5%	4%	4%	6%	4%	**8%**	3%	2%	-	6%
Native American or Alaska Native	1%	2%	0%	1%	1%	2%	2%	1%	0%	-	1%
Other	3%	2%	3%	3%	1%	3%	2%	2%	3%	-	4%
Prefer not to say	0%	0%	1%	0%	1%	1%	1%	1%	0%	0%	0%

Bold red data indicates significantly higher data among sub-groups.

Respondent Profile

	Total	Gender		Age			Household Income			Ethnicity	
	Total	Male	Female	18-34	35-54	55+	<$50K	$50K-$100K	$100K+	Hispanic	Non-Hispanic
Base Size	417	166	251	156	141	120	171	133	92	115	300
Length of Residence in San Diego											
Less than one year	7%	10%	5%	**11%**	6%	3%	**11%**	4%	4%	**13%**	5%
1-5 yrs	12%	9%	14%	**22%**	8%	3%	13%	14%	8%	14%	11%
5-9 yrs	10%	13%	8%	13%	6%	11%	9%	12%	7%	11%	10%
10-20 yrs	18%	15%	20%	20%	17%	16%	12%	16%	**28%**	19%	17%
20-30 yrs	22%	20%	23%	23%	22%	19%	22%	18%	27%	17%	23%
More than 30 years	27%	26%	28%	7%	**36%**	**43%**	26%	32%	24%	18%	**31%**
Don't know/Prefer not to say	5%	7%	3%	4%	5%	5%	7%	5%	2%	8%	4%
Children Under 18											
One	15%	15%	14%	**21%**	**15%**	6%	15%	11%	**23%**	**23%**	12%
Two	10%	**13%**	7%	**10%**	**16%**	1%	6%	**14%**	12%	14%	8%
Three	6%	7%	6%	6%	**11%**	2%	6%	5%	9%	9%	6%
Four	1%	1%	2%	2%	1%	0%	1%	1%	2%	1%	1%
Five or more	1%	2%	1%	2%	2%	0%	2%	1%	1%	**4%**	0%
None	66%	61%	70%	58%	54%	**91%**	**70%**	**68%**	53%	50%	**73%**
Prefer not to say	0%	1%	0%	1%	0%	1%	0%	2%	0%	0%	0%

Bold red data indicates significantly higher data among sub-groups.

Respondent Profile

	Total	Gender		Age			Household Income			Ethnicity	
	Total	Male	Female	18-34	35-54	55+	<$50K	$50K-$100K	$100K+	Hispanic	Non-Hispanic
Base Size	417	166	251	156	141	120	171	133	92	115	300
Household Income											
Under $50K	41%	39%	43%	**47%**	34%	41%	100%	-	-	**54%**	36%
$50K-$100K	32%	32%	32%	30%	35%	31%	-	100%	-	22%	36%
$100K+	22%	27%	19%	20%	**28%**	18%	-	-	100%	21%	23%
Mean (in thousands)	74.9	77.4	73.2	71.1	81.7	71.7	28.1	**71.9**	**166.3**	64.3	**79.3**
Education											
Less than high school	2%	2%	2%	3%	4%	1%	**4%**	1%	2%	4%	2%
High school/GED	13%	10%	15%	**17%**	11%	9%	**21%**	8%	5%	**21%**	10%
Professional school/training	3%	4%	2%	3%	4%	2%	**3%**	**5%**		5%	2%
Some college	24%	21%	27%	25%	20%	29%	**32%**	**25%**	12%	17%	**27%**
Associate's degree	13%	13%	12%	12%	13%	13%	15%	13%	9%	15%	12%
Bachelor's degree	25%	27%	25%	24%	30%	22%	17%	**33%**	**32%**	21%	27%
Some graduate school	4%	5%	4%	4%	4%	6%	4%	5%	3%	5%	4%
Graduate school degree	15%	18%	13%	12%	16%	18%	5%	11%	**36%**	10%	17%
Prefer not to say	0%	1%	0%	1%	0%	1%	0%	1%	1%	1%	0%

Bold red data indicates significantly higher data among sub-groups.

Appendix

- Executive Summary -

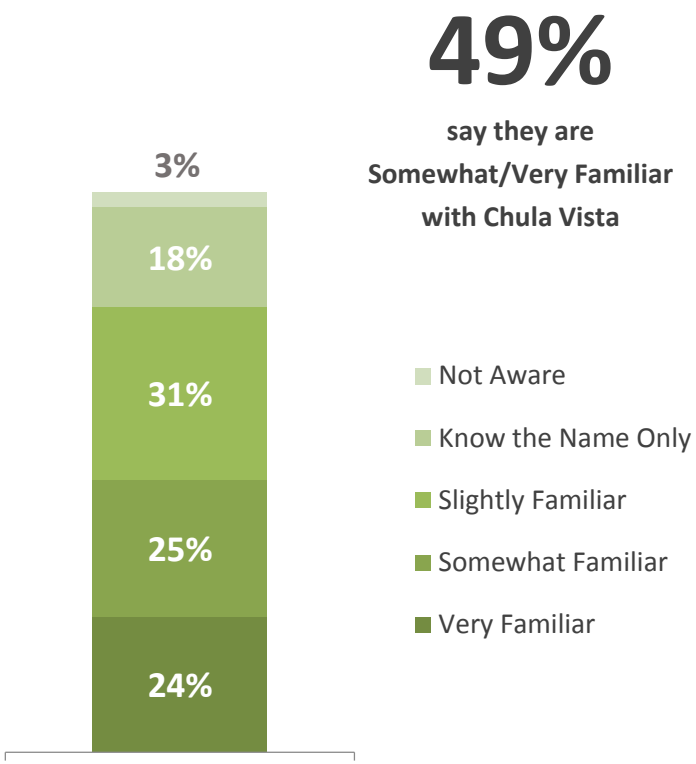
LUTH research

Executive Summary

Awareness of Chula Vista & Its Communities

Just under half of San Diego County residents say they are somewhat/very familiar with Chula Vista. Within Chula Vista, San Diego County residents are most familiar overall with the communities of Eastlake, Otay Ranch and Main Street (32%-35% top 2 box).

- Higher levels of awareness among Hispanics, San Diego City & East County residents (54%-63%) – not only for Chula Vista overall, but for the individual communities within.
- Non-Hispanics, older (55+) and North County residents are more likely to be slightly familiar.
- Awareness is high among those with a positive perception of the city (82%), implying a positive correlation between a person's sentiments and their knowledge/experience with Chula Vista.



Parts may not add up to the sum due to rounding.

Executive Summary

Frequency and Reasons for Visits

On average, those who visit Chula Vista say they visit 12 times a year. Most say they travel to Chula Vista to visit family and friends, as well as for the shopping and dining experiences, followed by entertainment and work/business.

- Less than half say they visit more than once a year (47%). One out of six say they never visit (16%).
- Those who visit significantly more often include:
  - Hispanics: 22 times/year
  - City of San Diego residents: 16 times/year
  - Those with children in the HH: 15 times/year
  - 18-34 year olds: 14 times/year
- East County residents go to visit family and friends; San Diego City residents visit for the shopping and dining experiences.
- A third of North County residents say they never visit Chula Vista; however, they are more likely than other residents to visit tourist attractions and venues when they do go.

Reasons for Visit

39% Visit friends/family

34% Shopping

25% Dining

21% Entertainment

18% Work/Business

Executive Summary

Awareness of Attractions

While there is a clear order of both awareness and visitation to Chula Vista attractions, perhaps most importantly, residents of San Diego County express a significant interest in specific attractions upon learning of those assets – namely the Living Coast Discovery Center and Third Avenue Historic Downtown, among others.

- A quarter say while they were not previously aware of the Living Coast Discovery Center and Third Avenue Historic Downtown District, they would be interested in visiting.
- North County Inland residents show significant interest in these as well as Chula Vista Marina, Sleep Train Amphitheater and Aquatica.

Top Awareness	
Sleep Train Amphitheater	71%
Aquatica	67%
U.S. Olympic Training Center	61%

Top Visited	
Sleep Train Amphitheater	43%
Third Ave Historic Downtown	33%
Chula Vista Marina	30%

Greatest Opportunity for Visits	
Living Coast Discovery Center	28%
Third Avenue Historic Downtown	21%

(% who were not aware but interested)

Executive Summary

Overall Perceptions of Chula Vista

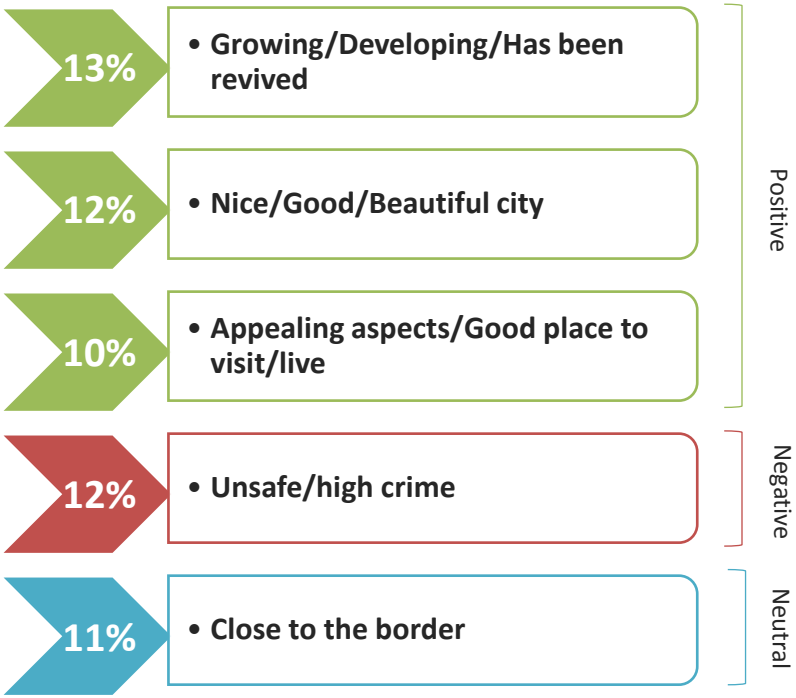
Overall, 41% express positive perceptions of Chula Vista. Residents of San Diego County have the most positive perceptions of the neighborhoods Chula Vista Marina, Eastlake and Otay Ranch within Chula Vista (74%-80%).

- Hispanics, lower income and East County residents are more likely to express positive opinions of the city, while Non-Hispanics, higher income and North County Inland residents are more likely to say that their perceptions are somewhat negative.

- Overall, top of mind perceptions were evenly split in terms of being positive (35%), neutral (31%) and negative (35%).

Top 5 Unaided Perceptions

(Based on open ended responses)



Executive Summary

Perceptions, Deterrents, & Appeals

San Diegans point to Chula Vista being too far, unsafe, and having a poor reputation as reasons that prevent them from visiting more. They say that if it were easier to get to, had more attractions/fun things to do, and felt safer, they would be more inclined to visit.

- Top associations include its location and diversity. Safety, convenient transportation within the city and activities/fun things to do are all ranked lowest (28%-37%).

Top Perceptions	
Close to Mexico	85%
Multi-cultural city	74%
Close by / easy to get to	53%

- Distance, the perception that the city is unsafe and its overall reputation are among the top reasons why county residents say they don't visit Chula Vista more often.

Top Deterrents	
Too far / difficult to get to	49%
Unsafe	27%
Overall reputation	25%

- Even those with *negative* perceptions of Chula Vista are more likely to say these top 3 appealing aspects would encourage them to visit Chula Vista more often.

Top Appeals	
Easier to get to / closer to where I live	36%
More attractions / fun things to	29%
Feeling safer	29%

Executive Summary

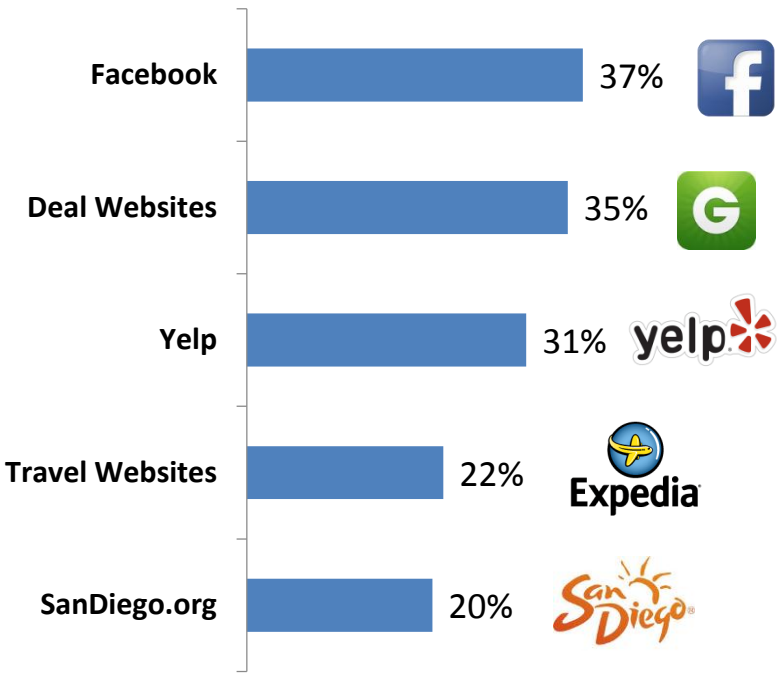
Marketing & Communication Channels

The Internet is by far the most utilized method of finding out information about activities and things to do in San Diego County, while more traditional means of communication – radio, local publications and local TV stations – are less utilized overall (11%-12% usage).

- Facebook is the most highly utilized, followed by deal websites (such as Living Social, Groupon, Amazon Local), Yelp, travel websites (such as Trip Advisor, Expedia) and SanDiego.org – all of which are used by at least one in five residents.

- What should be promoted in 2014? Residents of San Diego believe Chula Vista should emphasize the Bayfront Master Plan first and foremost. This was followed by the city's great dining and shopping options, fun and unique tourist attractions, and the fact that it is close by/easy to get to (24%-36%).

Top 5 Communication Channels



Appendix

- Questionnaire -

Questionnaire

167131 – LUTH RESEARCH – CITY OF CHULA VISTA
AWARENESS AND PERCEPTIONS RESEARCH STUDY

QUOTAS & SCREENING CRITERIA

Total N=400

- Minimum N=50 per region:
  - North County Coastal
  - North County Inland
  - City of San Diego
  - East County
  - South Bay

Screening Criteria:

- Ages 18+
- Live in San Diego County (excluding Chula Vista)

INTRO

[PROGRAMMER NOTE: INSERT FOLLOWING TEXT ON SEPARATE SCREEN]

Thank you for agreeing to participate in our web survey. We want to assure you that all of your responses will be strictly confidential and no one will attempt to sell you anything as a result of this research.

This survey should take approximately 10 minutes to complete. Please keep in mind, if you are unable to complete the survey in one sitting, you can always close the window and return at a later time to finish. When you are ready to continue, you can click on the original link in the email and the survey will resume where you left off. Please note that you will not be able to go back and change your answers.

Questionnaire

SCREENING QUESTIONS

S1. Please enter your zip code: _____
[IF ZIP CODE = WITHIN CHULA VISTA OR OUTSIDE OF SAN DIEGO, THANK AND TERMINATE]

[ADD HIDDEN QUOTA TO TRACK FIVE REGIONS (N=50 MINIMUM IN EACH): NORTH COUNTY COASTAL, NORTH COUNTY INLAND, CITY OF SAN DIEGO, EAST COUNTY, SOUTH BAY]

S2. Which of the following includes your age?

1. Under 18 years of age **[THANK AND TERMINATE]**
2. 18 to 24 years of age
3. 25 to 34 years of age
4. 35 to 44 years of age
5. 45 to 54 years of age
6. 55 to 64 years of age
7. 65 years or older

99. Prefer not to answer **[THANK AND TERMINATE]**

S3. Which of the following best describes your ethnic heritage?

1. White or Caucasian
2. Black or African-American
3. Hispanic or Latino
4. Asian or Pacific Islander
5. Native American or Alaska Native
6. Other
7. Prefer not to say

S4. Please indicate whether you or any member of your immediate family work for any of the following. Please select all that apply. **[RANDOMIZE LIST; MULTIPLE RESPONSE]**

1. A marketing research company or department **[TERMINATE]**
2. An advertising agency or public relations firm **[TERMINATE]**
3. None of the above **[ANCHOR; MUTUALLY EXCLUSIVE]**

[END OF SCREENER]

Questionnaire

MAIN QUESTIONNAIRE

We would like to understand your experiences and perceptions as it relates to different cities within San Diego County.
[INSERT SPACE HERE; START Q1 ON NEW LINE]

Q1. How familiar are you with the following cities within San Diego County? **[SINGLE RESPONSE]**

	Very Familiar (5)	Somewhat Familiar (4)	Slightly Familiar (3)	Know the Name Only (2)	Not Aware (1)
a. Chula Vista					
b. Oceanside					
c. Escondido					
d. Carlsbad					
e. El Cajon					
f. Vista					
g. San Marcos					
h. Encinitas					
i. National City					
j. La Mesa					

Q2. Using a 5-point scale where 5 is "Extremely Positive" and 1 is "Extremely Negative," please rate your overall perception of each of the following cities within San Diego County. **[SINGLE RESPONSE]**

[SHOW ONLY THOSE CITIES WHERE CODES 3-5 WERE SELECTED IN Q1]	Extremely Positive (5)	Somewhat Positive (4)	Neutral (3)	Somewhat Negative (2)	Extremely Negative (1)

Q3. Now thinking just about Chula Vista, what is your overall opinion or perception of the city? **[OPEN END; INSERT TEXT BOX]**

Q4. On average, how often do you visit the city of Chula Vista? **[SINGLE RESPONSE]**

1. Once a week or more
2. 2-3 times a month
3. Once every 1 to 3 months
4. Once every 4 to 6 months
5. Once a year
6. Once every few years or less
7. I never visit the city of Chula Vista **[SKIP TO Q6]**

Questionnaire

Q5. What is your primary reason(s) for visiting Chula Vista? Please select all that apply. **[ROTATE LIST; MULTIPLE RESPONSE]**

1. Shopping
2. Dining
3. Entertainment (movies, concerts, plays, etc.)
4. Boating/water sports
5. Golf
6. Hiking/Biking/Walking
7. Team sports facilities/fields (soccer, baseball, basketball)
8. Enjoy/take in the natural landscape/environment
9. Visit tourist attractions/venues
10. Visit family/friends who live in Chula Vista
11. Work/business
12. Other, please specify _____

Q6. How familiar are you with the following towns/communities within Chula Vista? **[SINGLE RESPONSE]**

	Very Familiar	Somewhat Familiar	Slightly Familiar	Know the Name Only	Not Aware
1. Chula Vista Marina					
2. Eastlake					
3. Otay Ranch					
4. Rancho del Rey					
5. San Miguel Ranch					
6. Rolling Hills Ranch					
7. Southwest Chula Vista					
8. Northwest/Third Avenue Chula Vista					
9. Main Street					
10. H Street Corridor					

[IF "NOT AWARE" AND/OR "KNOW THE NAME ONLY" IS SELECTED FOR ALL, SKIP TO Q8]

Q7. Using a 5-point scale where 5 is "Extremely Positive" and 1 is "Extremely Negative," please rate your overall perception of each of the following towns/communities within Chula Vista. **[SINGLE RESPONSE]**

[ONLY SHOW THOSE TOWNS WHERE CODES 3-5 WERE SELECTED IN Q6]	Extremely Positive (5)	Somewhat Positive (4)	Neutral (3)	Somewhat Negative (2)	Extremely Negative (1)

Questionnaire

Q8. For each of the following, please select the option that most accurately describes your experience with each attraction located in Chula Vista. **[RANDOMIZE LIST; SINGLE RESPONSE]**

[NOTE TO PROGRAMMER: CAN YOU MAKE WIDTH OF FIRST COLUMN (WITH ATTRACTION NAMES) WIDER AND THE OTHERS MORE NARROW?]

	Have visited	Heard of but never visited	Never heard of but would be interested in visiting	Never heard of and have no interest in visiting
1. Sleep Train Amphitheater (formerly Cricket Amphitheater)				
2. U.S. Olympic Training Center				
3. Living Coast Discovery Center (formerly Chula Vista Nature Center)				
4. Chula Vista Marina				
5. Otay Ranch Town Center				
6. Chula Vista Center				
7. Third Avenue – Historic Downtown				
8. Aquatica (formerly Knotts Soak City)				
9. Chula Vista Golf Courses				

Q9. Using a 5-point scale where 5 is "Strongly Agree" and 1 is "Strongly Disagree," please indicate how much you agree or disagree with each of the following statements about Chula Vista. **[RANDOMIZE LIST; SINGLE RESPONSE]**

Chula Vista....	Strongly Agree (5)	Agree (4)	Neither Agree/ Disagree (3)	Disagree (2)	Strongly Disagree (1)
a. Is safe					
b. Is clean					
c. Is close by/easy to get to from the rest of San Diego					
d. Has a convenient transportation system within the city					
e. Has a lot of fun activities/sights for visitors to do and see					
f. Has great dining options					
g. Has great shopping options					
h. Is a multi-cultural city					
i. Adequately maintains the city/ infrastructure					
j. Activities/attractions are reasonably priced					
k. Is close to Mexico					
l. Has great housing communities					

Questionnaire

Q10. Which of the following may prevent you from visiting Chula Vista more often? Please select all that apply. **[RANDOMIZE LIST; MULTIPLE RESPONSE]**

1. Overall reputation
2. Unsafe
3. Unclean
4. Too far / difficult to get to
5. Poor transportation within the city
6. Lack of attractions/fun things to
7. Lack of good dining options
8. Lack of good shopping options
9. Lack of cultural activity
10. Poor maintenance of city/infrastructure
11. Activities/attractions are too expensive
12. Proximity to Mexico
98. Other, please specify _____
99. Don't know/None of the above

Q11. What, if anything, would entice you to visit Chula Vista more often? Please select all that apply. **[RANDOMIZE LIST; MULTIPLE RESPONSE]**

1. Better reputation
2. Feeling safer
3. Cleaner city
4. Easier to get to / closer to where I live
5. More convenient transportation within the city
6. More attractions/fun things to
7. Better dining options
8. Better shopping options
9. More cultural activity
10. Better maintenance of city/infrastructure
11. Activities/attractions were less expensive
12. Greater distinction/division from Mexico
98. Other, please specify _____
99. Don't Know/None of the above

Q12. Are you aware of the ***Chula Vista Bayfront Master Plan***?

1. Yes
2. No

[SHOW THE FOLLOWING STATEMENT ABOVE Q13]

At 535 acres, the Chula Vista Bayfront Master Plan will transform Chula Vista's underused industrial bayfront landscape into a thriving residential and world-class waterfront resort destination. The Plan establishes thousands of new jobs, creates new public parks, protects natural coastal resources, provides conference and visitor-serving amenities and builds an important asset for the San Diego region, the South Bay, Chula Vista residents and coastal visitors. The Bayfront Master Plan is the result of a decade-long joint planning effort and was

Questionnaire

approved by the California Coastal Commission in August of 2012.

[PLEASE ADD SUFFICIENT SPACE BELOW PARAGRAPH & ABOVE QUESTION WORDING]

Q13. Using a 5-point scale where 5 is "Strongly Agree" and 1 is "Strongly Disagree," please indicate how much you agree or disagree with the following statement. **[SINGLE RESPONSE]**

The **Chula Vista Bayfront Master Plan** is an opportunity to create another vibrant destination on San Diego Bay for residents and visitors.	Strongly Agree (5)	Agree (4)	Neither Agree/ Disagree (3)	Disagree (2)	Strongly Disagree (1)

Q14. Which of the following do you primarily use to find out information about activities/things to do in San Diego County? Please select all that apply. **[ROTATE LIST; ANCHOR CODES 7-99; MULTIPLE RESPONSE]**

1. Yelp
2. Facebook
3. Twitter
4. Deal Websites (Living Social, Groupon, Amazon Local, etc.)
5. Travel Websites (Trip Advisor, Expedia, etc.)
6. SanDiego.org
7. Local Publications/their websites (please specify) _____
8. Local Radio Stations/their websites (please specify) _____
9. Local TV Stations/their websites (please specify) _____
98. Other, please specify _____
99. None of the above

Q15. In your opinion, which of the following aspects of Chula Vista should be emphasized most to the residents of San Diego County in 2014? Please select up to three. **[RANDOMIZE LIST; MULTIPLE RESPONSE]**

1. Close by/easy to get to (located only 7 miles from Downtown San Diego)
2. Great dining/shopping
3. Fun/unique tourist attractions
4. Great for sports/outdoor activities (golf courses/hiking trails/boating)
5. Beautiful natural environment
6. Inexpensive to visit
7. History of the city
8. Strong cultural activity
9. The Chula Vista Bayfront Master Plan (developing the city's landscape)
10. Great housing communities
98. Other, please specify _____
99. Don't Know/Not sure

Questionnaire

DEMOGRAPHICS

D1. Please indicate your gender.

1. Male
2. Female

D2. How long have you lived in San Diego County? **[INSERT DROPDOWN MENU WITH INDIVIDUAL PUNCH SELECTIONS]**

1. Less than one year
2. 1 year
3. 2 years

.....

.....

.....

31. 30 years
32. More than 30 years
98. Don't know/Prefer not to say

D3. How many children do you have under the age of 18?

1. One
2. Two
3. Three
4. Four
5. Five or more
98. None
99. Prefer not to say

D4. Which of the following includes your household's total yearly income?

1. Under $25,000
2. $25,000 but less than $50,000
3. $50,000 but less than $75,000
4. $75,000 but less than $100,000
5. $100,000 but less than $150,000
6. $150,000 but less than $200,000
7. $200,000 but less than $250,000
8. $250,000 but less than $300,000
9. $300,000 and over
10. Prefer not to say

Questionnaire

D5. Which of the following best describes the highest level of education that you have completed?

1. Less than high school
2. High school/GED
3. Professional school/training (i.e., Mechanic, Beautician)
4. Some college
5. Associate's degree
6. Bachelor's degree
7. Some graduate school
8. Graduate school degree
9. Prefer not to say

Thank you for taking the time to complete our survey.

[END SURVEY]