

Mendocino County

E Mail Survey

Draft Report



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Project Overview

In an effort to determine behavior, motivations and perceptions of visitors and non-visitors to Mendocino County, Visit Mendocino contracted with the Strategic Marketing Group (SMG) to conduct the 2014 Mendocino County Email Visitor Survey.

Project Objectives:

- **To understand the current visitor behavior** including reasons for visiting, activities, season visited and type of lodging used.
- **To understand current visitor and non-visitor perceptions of Mendocino County**, including agreement ratings and comparison with other destinations.
- **To determine Mendocino County's Net Promoter Score**, a metric for evaluating how likely visitors are to recommend visiting Mendocino County.
- **To evaluate** future visits, including likelihood of visit and factors that influence decision to visit.
- **Develop recommendations** that work to improve the effectiveness of Visit Mendocino's marketing programs.

Methodology:

SMG launched the online survey in February 2014 using Visit Mendocino County's Email database. A total of 1,226 surveys were completed.

- 62% from Northern California
- 8% were from Central California
- 11% were from Southern California
- 13% were from outside California
- 6% were from other/unspecified areas

Among these respondents, 57% had visited Mendocino County for an overnight trip within the past two years and 43% had not.

Once the survey was complete, results were tabulated, analyzed and developed into this final report.

Executive Summary

Part 1: Drivers and Travel Behavior

Visitors and Non-Visitors

- Over half (57%) of respondents had visited Mendocino County for an overnight trip in the past two years.
- The remaining 43% are considered non-visitors for the purposes of this study.
- About three-quarters of visitor respondents live in Northern California.

Primary Reason for Visiting

- Most visitors (75%) traveled to Mendocino for pleasure/vacation.
- This percentage was markedly lower among those who had visited 6 or more times (55%).

Primary Reason for Not Visiting

- Most popular reasons for not visiting Mendocino included going to a different destination, cutting back on trips, or distance to Mendocino.
- Only 1% had not visited Mendocino County because it does not have activities that appeal to them.

Number of Visits to Mendocino County

- The sample included a mix of respondents who had visited Mendocino County once, twice, three to five times, or six or more times.
- Number of visits increased with proximity of respondent's location to Mendocino County.

Season Visited

- No single season accounted for even a third of visitors, which indicates that there is no distinct “tourist season” for visitors overall.
- However, respondents who lived further away were much more likely to visit in summer.

Visitor Activities

- The most common activities included sightseeing, shopping, fine dining, beaches and beach play.
- Activities notably varied by number of times visited; for example, compared with other respondents, those who

visited most often were less likely to sightsee, but more likely to participate in less popular outdoor activities.

Location Stayed/Familiarity

- Most visitors stayed in either Mendocino (34%) or Fort Bragg (30%).
- Likewise, awareness of Mendocino and Fort Bragg was significantly higher among non-visitors than other areas in Mendocino County.
- Likelihood of staying in another area of Mendocino County increased with number of visits.

Lodging

- 42% of visitors stayed in a hotel or motel, followed by 24% who stayed at a bed and breakfast or inn.

Part 2: Perceptions of Mendocino County

Visitor Description of Mendocino County Destination

- The survey asked visitors how they described where they were going on their last trip to Mendocino County to friends and family. Answers to this question indicate how visitors feel others will best comprehend their destination.
- Most respondents (64%) listed the specific town they were visiting.
- Respondents visiting from further away were more likely to describe their destinations in more generic terms, such as "Mendocino County" or "Wine Country."

Agreement with Positive Statements

- Visitors overwhelmingly agreed with several positive statements about Mendocino County; agreement increased with number of visits.
- Non-visitors also generally agreed with each statement, though somewhat less strongly than visitors.
- Both visitors and non-visitors strongly agreed that Mendocino County is "a place I like/would like to visit" and "a place that has scenic wonders."

Attributes that set Mendocino County Apart

- Visitors and non-visitors most often selected "scenic wonders" and "coast location" as attributes that set Mendocino County apart from other destinations.

- “Outdoor recreation” increased with number of visits, which aligns with the increased likelihood among repeat visitors for participating in outdoor activities (see “Visitor Activities,” above).

Attribute Comparison Ratings

- Visitors were presented with a list of destination attributes and asked to rate Mendocino compared with other destinations they have visited.
- Each attribute received very positive comparison ratings. "Scenic beauty" rated highest, followed by "natural wonders."
- "Ease of access," "price/value" and "special events" (4.9) scored lowest; however, even these received ratings well above neutral.
- Overall, ratings increased with number of visits.

Difficulty Accessing Mendocino County

- Over half of respondents (61%) indicated that Mendocino County is hard to reach.
- Interestingly, this varied little between visitors and non-visitors.

Net Promoter Score

- Net promoter scores measure the loyalty a customer has for a provider. For this survey, visitor respondents were asked to provide the likelihood that they would recommend Mendocino County to a friend or colleague on a scale of 1 (not at all likely) to 10 (very likely).
- Results were incredibly positive, with visitors averaging a score of 9.45. Although small differences in scores exist among demographics, no group provided a low or even neutral score.

Part 3: Future Travel

Preferred Destination Types

- About half of respondents plan to visit beach/coastal destinations in the next two years.
- Only 1% of respondents stated that they would not take any overnight trips in the next 24 months.

Likelihood of Visiting Mendocino County

- Respondents were very likely to visit Mendocino in the future; only 7% of respondents indicated that they were unlikely to take a trip to Mendocino in the next two years.
- Visitors were significantly more likely to anticipate a future visit than non-visitors.
- Likewise, likelihood of visiting in the future increased with number of visits.

Influencing Attributes

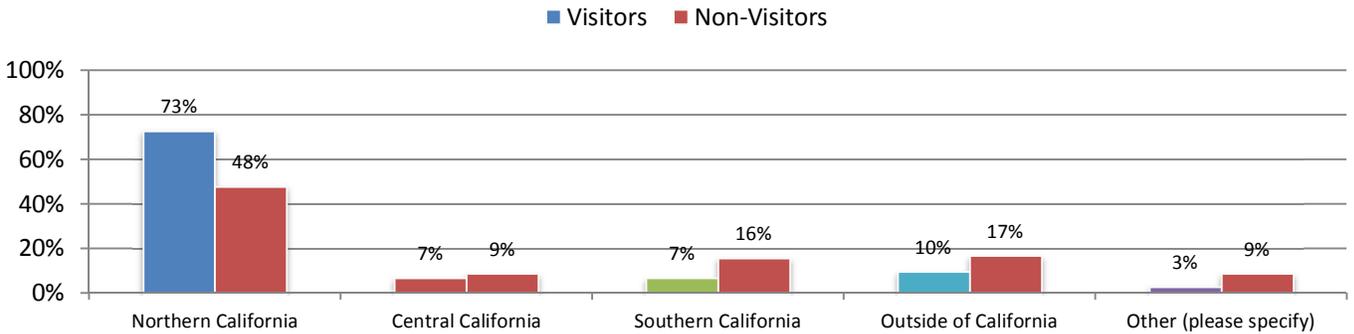
- Respondents rated several attributes on the level of influence each would have on their decision to take a future trip to Mendocino County.
- Overall, each attribute had a positive rating, with "just to get away" having the highest.
- "Attending a special event" and "visiting wineries" had the lowest ratings.

Part 1: Drivers and Travel Behavior

A. Visitors and Non-Visitors

- Over half (57%) of the survey sample indicated that they had visited Mendocino County for an overnight trip in the past two years.
 - The survey asked visitor respondents several questions about their travel to Mendocino County, including the number of times they have visited, their reason for visiting, the activities participated in, the location where they stayed and the type of lodging they used.
- The remaining 43% are considered non-visitors for the purposes of this study.
 - The survey asked non-visitors to indicate the primary reason they have not visited Mendocino County.
- 73% of visitors live in Northern California, compared with 48% among non-visitors.

Figure 1
Mendocino County Visitors (in %)
 (Base = All Respondents)

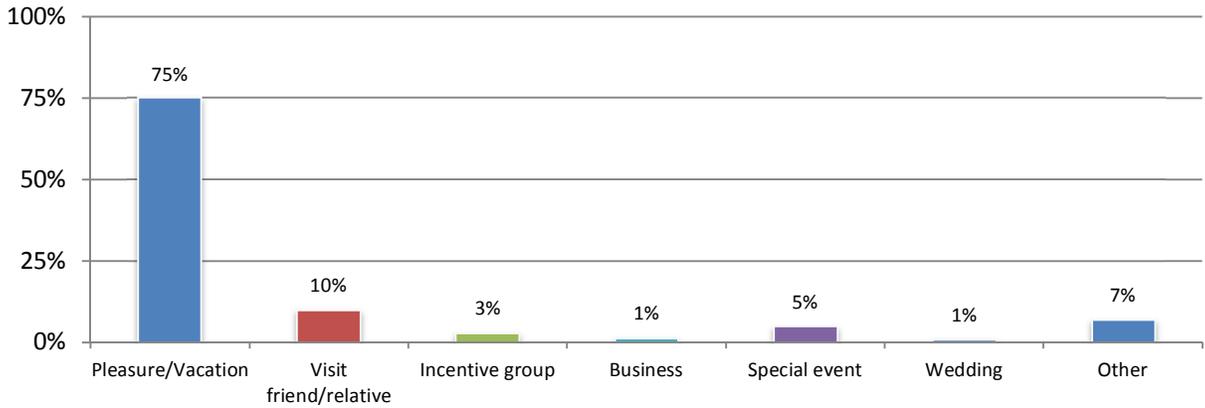


B. Drivers for Visiting/Not Visiting

Primary Reason for Visiting

- Visitors indicated the primary reason for their most recent visit to Mendocino County.
- 75% of visitors visited for pleasure or vacation.
 - This percentage was mostly consistent by visitor location; however, it was slightly lower among those from Central California, due to a slight increase in visits to friends/relatives among this group.
 - “Pleasure/vacation” was consistently high by number of visits, from single-visit respondents (81%) to those who had visited three to five times (78%), with a marked decline among those visiting 6 or more times (55%).

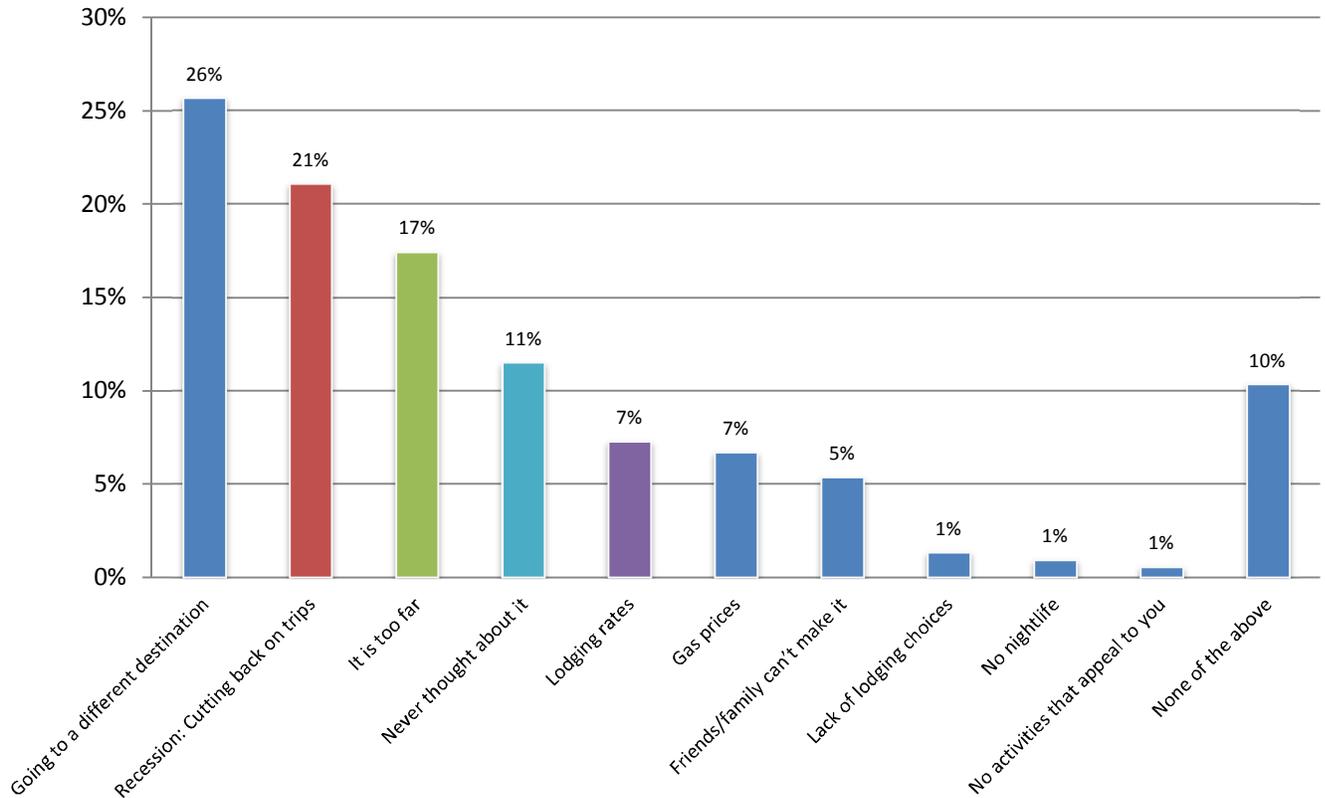
Figure 2
Primary Reason for Last Visit (in %)
(Base = Visitors)



Primary Reason for Not Visiting

- The survey asked non-visitors to indicate their primary reason for not visiting Mendocino County within the past two years.
- The largest percentage (26%) of respondents indicated that they had gone to a different destination, followed by 21% who are cutting back on trips, and 17% who felt that Mendocino County was too far.
- Only 1% of respondents indicated that they had not visited Mendocino County because it did not have activities that appeal to them.
- Respondents from Southern California and outside of California were slightly more likely to say they had gone to a different destination (33% and 30%) than respondents in Northern (25%) or Central California (24%).
- Respondents from Southern and Central California were more likely to feel that Mendocino County was too far (20% each); interestingly, those from outside California were less likely to select this (16%).

Figure 3
Primary Reason for Not Visiting (in %)
(Base = Non-Visitors)

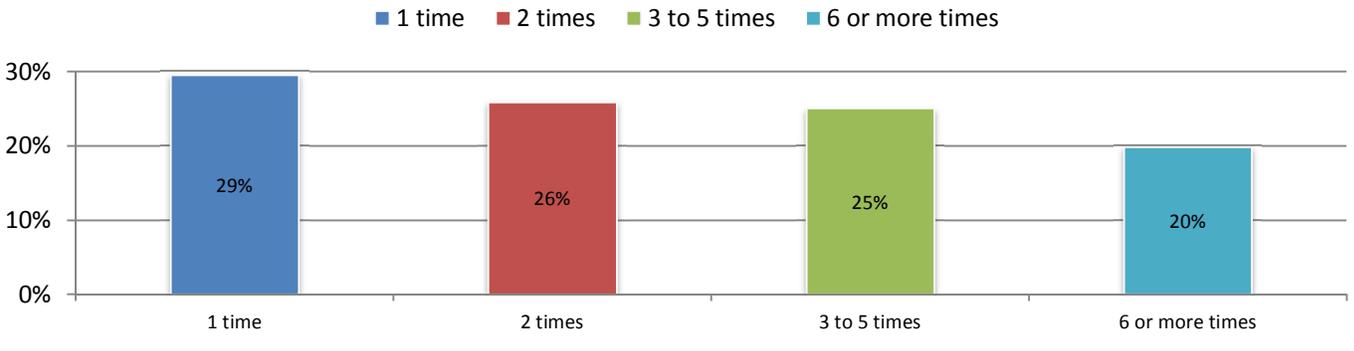


C. Visitor Behavior

Number of Visits to Mendocino County

- The survey asked visitors to indicate the number of times they have visited Mendocino County in the past two years.
- Respondents were about split among those who had visited once (30%), twice (26%) or three to five times (25%).
- 20% had visited 6 or more times in the past two years.
- Visits increased with proximity; 75% of Northern Californian visitors had visited more than once, compared with half (50%) from Southern California and 44% from outside California.

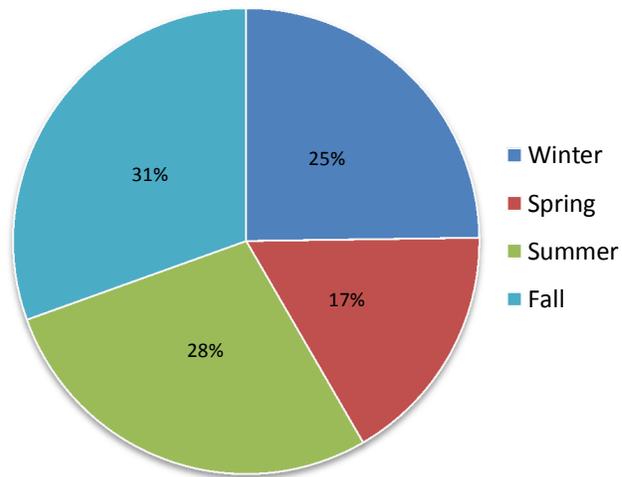
Figure 4
Number of Visits in Past Two Years (in %)
 (Base = Visitors)



Season Visited

- Visitors indicated the season of their most recent visit to Mendocino County.
- No single season accounted for a third of visitors, which indicates that there is no distinct “tourist season” for visitors overall.
 - Spring was the least popular season to visit, with 17%.
 - Fall was the most popular (31%), followed closely by summer (28%), then winter (25%).
- However, visits in summer increased significantly with visitor distance; 40% of those living outside of California visited in summer, compared with just 24% among those in Northern California.

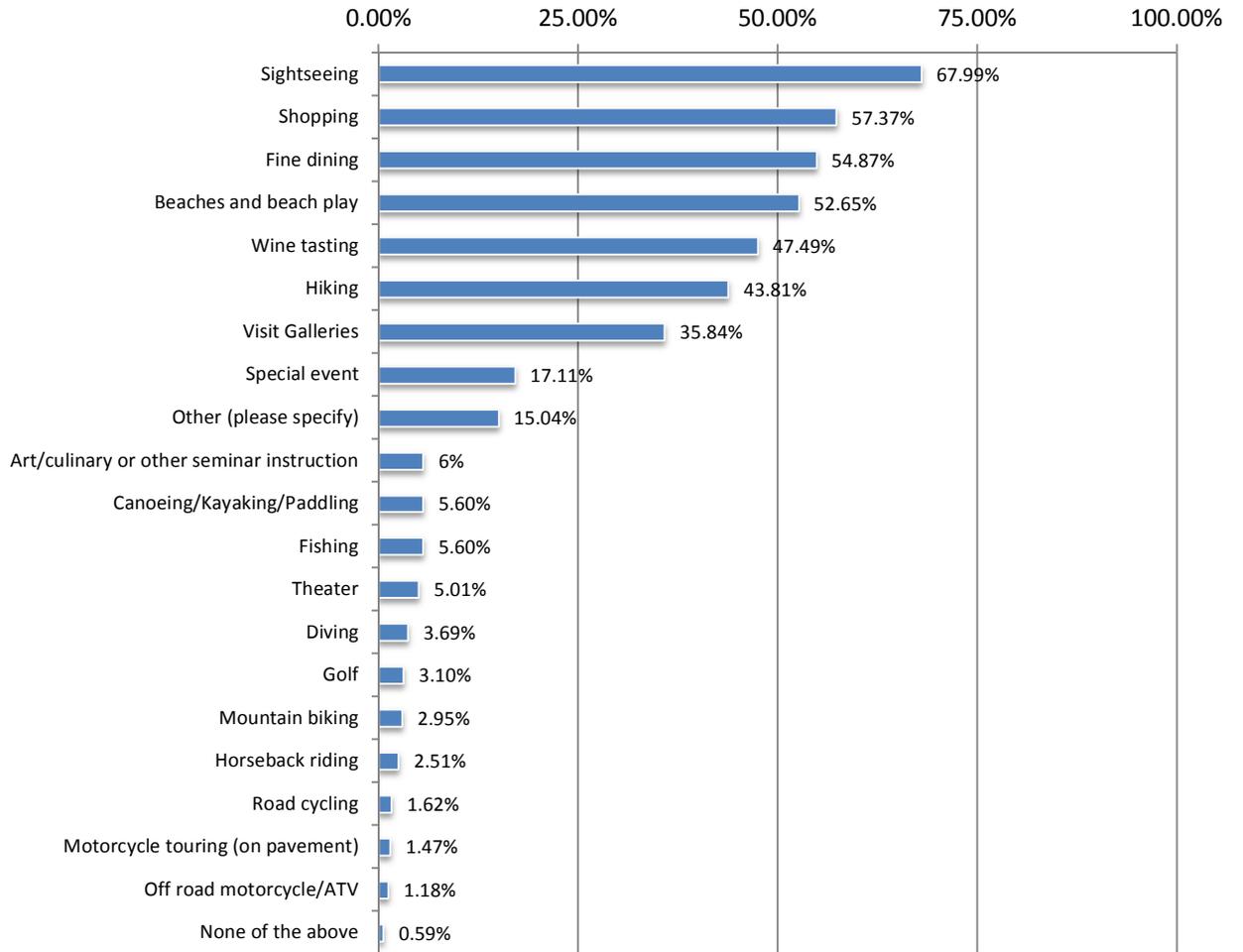
Figure 5
Season Last Visited (in %)
 (Base = Visitors)



Visitor Activities

- Visitors indicated the activities they participated in on their last visit to Mendocino County.
- Over half selected sightseeing (68%), shopping (57%), fine dining (55%), beaches and beach play (53%), followed by wine tasting (48%), hiking (44%) and visiting galleries (36%).
- Activities notably varied by number of times visited:
 - Sightseeing decreased as number of visits increased, from 75% among single-time visitors to 59% among those who had visited 6 or more times.
 - Other popular activities increased with number of visits. Fine dining increased from 51% among those visiting once to 62% among those visiting 6 or more times, while beaches and beach play increased from 46% to 59%.
 - Likewise, less popular outdoor activities—such as fishing, canoeing/kayaking/padding, golf, hiking, horseback riding, diving, motorcycle touring, off-road/ATV, mountain biking, and road cycling—all increased with number of visits.
 - Shopping was most popular among those visiting twice or three to five times (59% and 62%, respectively, compared with 54% among other respondents).
 - Interestingly, wine tasting remained popular among all respondents, regardless of number of visits.

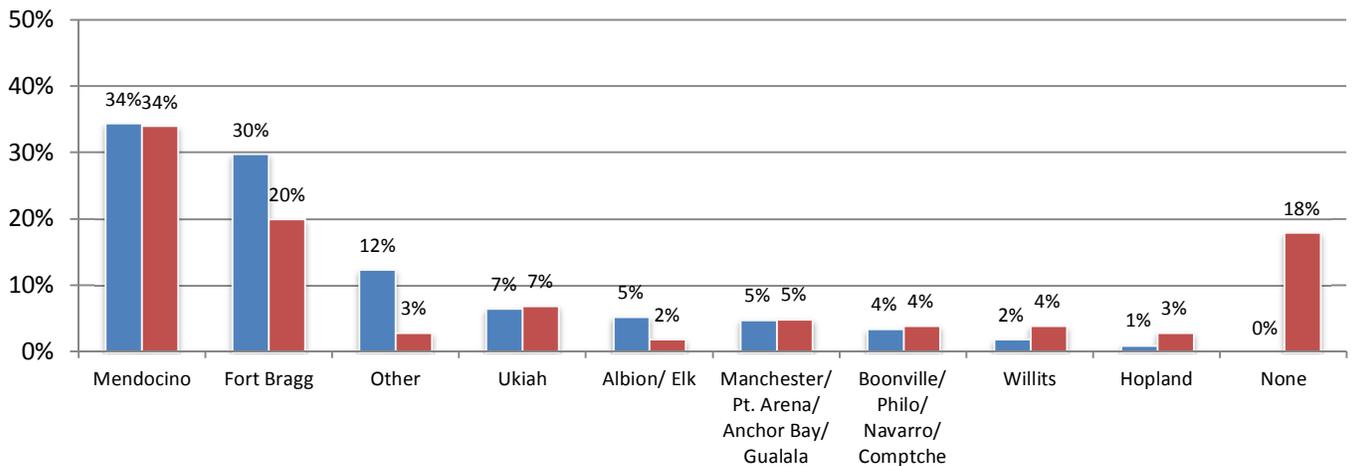
Figure 6
Activities during Last Visit (in %)
(Base = Visitors)



Location Stayed/Familiarity

- Visitors selected where they stayed in Mendocino County during their last visit from a list of locations, while non-visitors indicated the area they are most familiar with in Mendocino County.
- Among visitors:
 - Most stayed in either Mendocino (34%) or Fort Bragg (30%), followed by Ukiah (7%) and Albion/Elk (5%) and Manchester/Pt. Arena/Anchor Bay/Gualala (5%).
 - The percentage of respondents who visited Mendocino on their last trip decreased as number of visits increased, from 45% among single-time visitors to 26% among those visiting 6 or more times.
 - Likewise, the percentage of respondents selecting other locations tended to increase for other destinations with the number of visits. This was particularly true for Fort Bragg, which increased from 23% among single-time visitors to 39% among those who had visited three to five times.
 - Visits to Mendocino increased significantly among visitors from Southern California (50%).
- Among non-visitors:
 - Awareness of Mendocino and Fort Bragg was significantly higher than other areas within Mendocino County.
 - Only 18% indicated that they were not familiar with any of the areas.

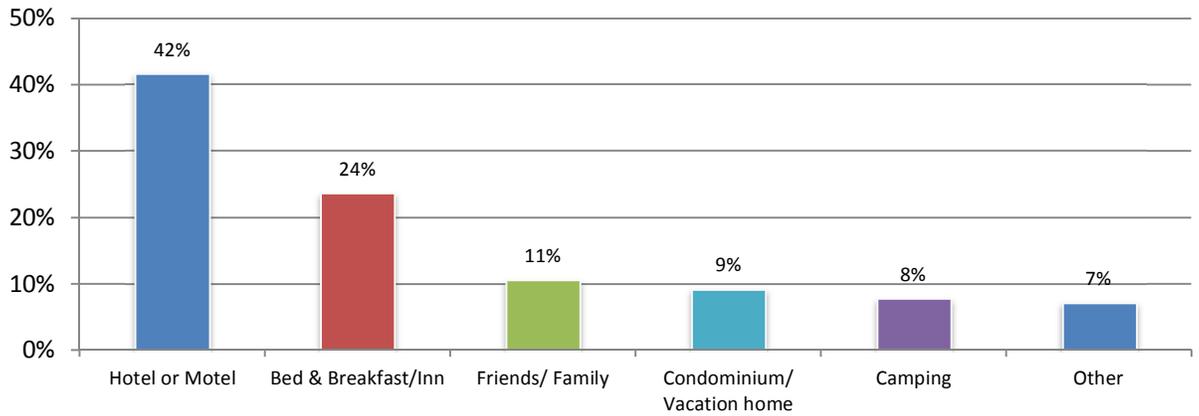
Figure 7
Location Stayed during Last Visit (in %)
 (Base = All Respondents)



Lodging

- Visitors indicated the type of lodging they stayed in during their last visit to Mendocino.
- 42% stayed in a hotel or motel, followed by 24% who stayed at a bed and breakfast or inn.
- The remaining respondents were about as likely to stay with friends or family (11%); in a condominium/vacation home (9%) or camp (8%).
- Respondents from Southern California were less likely to stay in a hotel or motel (27%) and more likely to opt for a bed and breakfast (32%) than other respondents.

Figure 8
Lodging during Last Visit (in %)
(Base = Visitors)

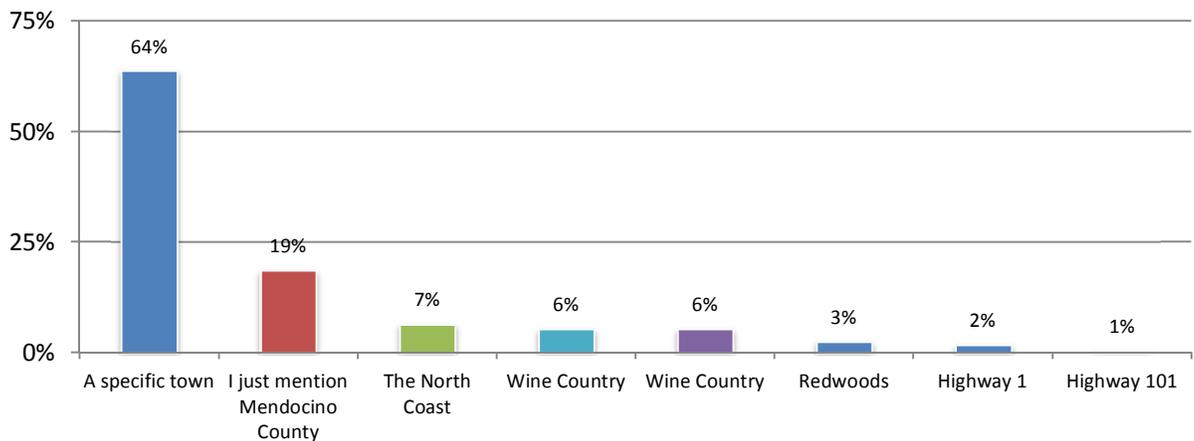


Part 2: Perceptions of Mendocino County

A. Visitor Description of Mendocino County Destination

- The survey asked visitors how they described where they were going on their last trip to Mendocino County to friends and family.
- Answers to this question indicate how visitors feel others will best comprehend their destination.
- Most respondents (64%) listed the specific town they were visiting.
 - This percentage increased among those from Central California and Northern California (73% and 70%, respectively) and decreased among those who live further away, in Southern California (50%) or outside of California (47%).
 - Likewise, respondents from further away were more likely to describe their destinations in more generic terms, such as "Mendocino County" or "Wine Country."

Figure 9
How Described Destination to Friends/Family (in %)
(Base = Visitors)



B. Agreement with Positive Statements

- The survey provided several positive statements about Mendocino County, and asked visitors and non-visitors to indicate their agreement with each.

C. Visitor Agreement

- Visitors overwhelmingly agreed with the statements, particularly with regard to "a place I like to visit" and "a place

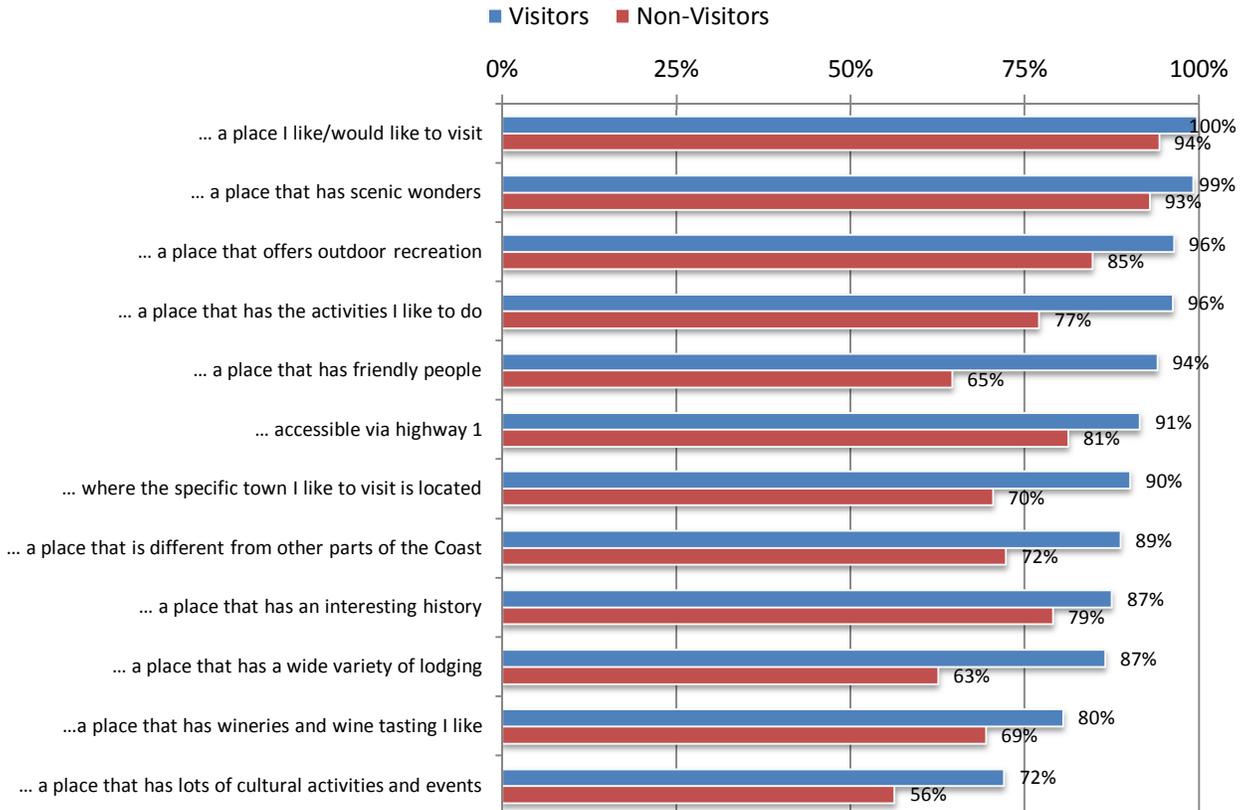
that has scenic wonders," which had nearly 100% agreement from visitors.

- Visitors were least likely to agree that Mendocino County is "a place that has lots of cultural activities and events" (72%).
- Likelihood of agreement increased with number of visits to Mendocino County.

D. Non-Visitor Agreement

- Non-visitors generally agreed with each statement, though somewhat less strongly than visitors.
- Yet nearly all non-visitors agreed that Mendocino County is "a place I would like to visit" (94%) and "a place that has scenic wonders" (93%).
- Non-visitors were significantly less likely to agree that Mendocino "has friendly people" (65%, compared with 94% among visitors), and "has a wide variety of lodging" (63%, compared with 87% among visitors).

Figure 10
Agreement with Positive Statements (in %)
(Base = All Respondents)



E. Attributes that set Mendocino County Apart

- The survey presented both visitors and non-visitors with a list of positive attributes and asked them to select the ones they felt set Mendocino County apart from other coastal destinations.
- Visitors selected attributes based on their experience in Mendocino County, while non-visitors were instructed to select attributes based on what they know of Mendocino County.

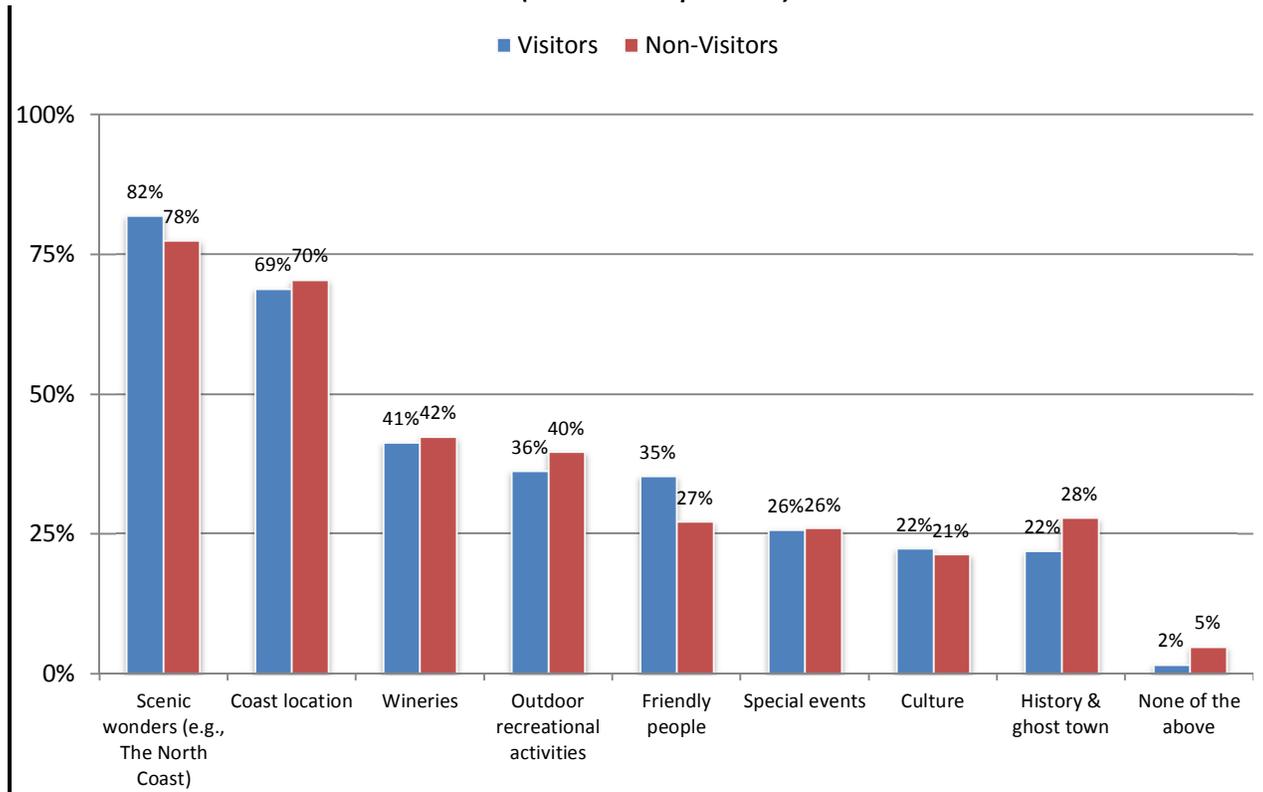
F. Visitor-Selected Attributes

- Visitors most often selected “scenic wonders” (82%), followed by “coast location” (69%).
 - “Coast location” was significantly more important to visitors from Southern California (80%) and, to some extent, those from Northern California (68%) compared with visitors from other locations (61%).
- “Outdoor recreation” increased with number of visits, from 26% among single-time visitors to 49% among those visiting 6 times or more.
 - This aligns with the increased likelihood among repeat visitors for participating in outdoor activities (see “Visitor Activities,” above).
- Visitors were least likely to select “history and ghost town” (22%) “culture” (22%), and “special events” (26%).

G. Non-Visitor-Selected Attributes

- Like visitors, non-visitors most often selected “scenic wonders” (78%), followed by “coast location” (70%).
- Overall, non-visitor attribute selections varied little from those selected by visitors:
 - Non-visitors were somewhat likely to select "friendly people" than visitors;
 - Non-visitors were more likely to select "history & ghost town" and "outdoor recreational activities" than visitors.

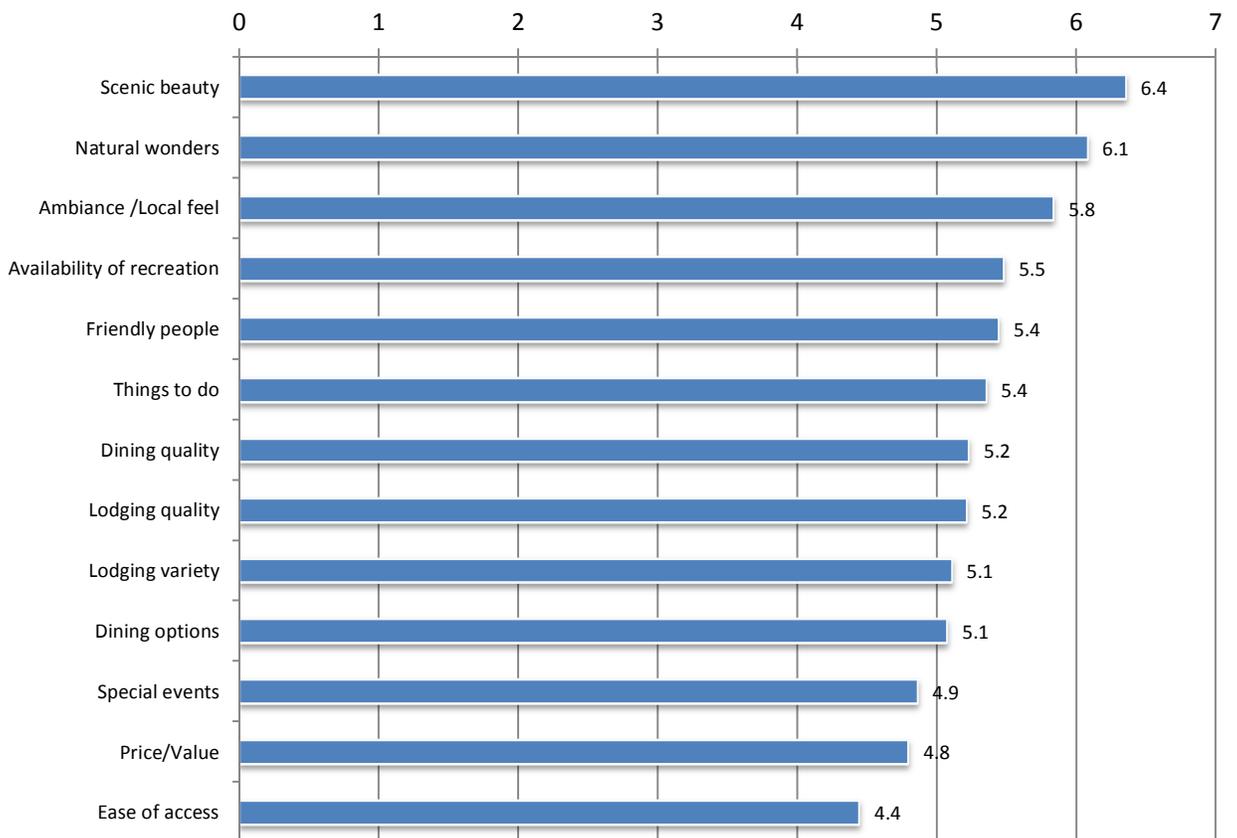
Figure 11
Agreement with Positive Statements (in %)
(Base = All Respondents)



H. Attribute Comparison Ratings

- Visitors were presented with a list of destination attributes and asked to rate Mendocino compared with other destinations they have visited, using a scale from 1 (much worse) to 7 (much better).
- On average, each attribute received very positive comparison ratings. "Scenic beauty" rated highest, scoring a 6.4 out of 7, followed by "natural wonders" with 6.1.
- "Ease of access" (4.4), "price/value" (4.8) and "special events" (4.9) scored lowest; however, even these received ratings well above neutral (3.5).
- Overall, ratings increased with number of visits.
 - "Special events" ratings increased most notably, from 4.5 among single-time visitors to 5.2 among those who had visited 6 or more times.
 - "Availability of recreation" also increased, from 5.2 among single-visitors to 5.7 among those who had visited six or more times.

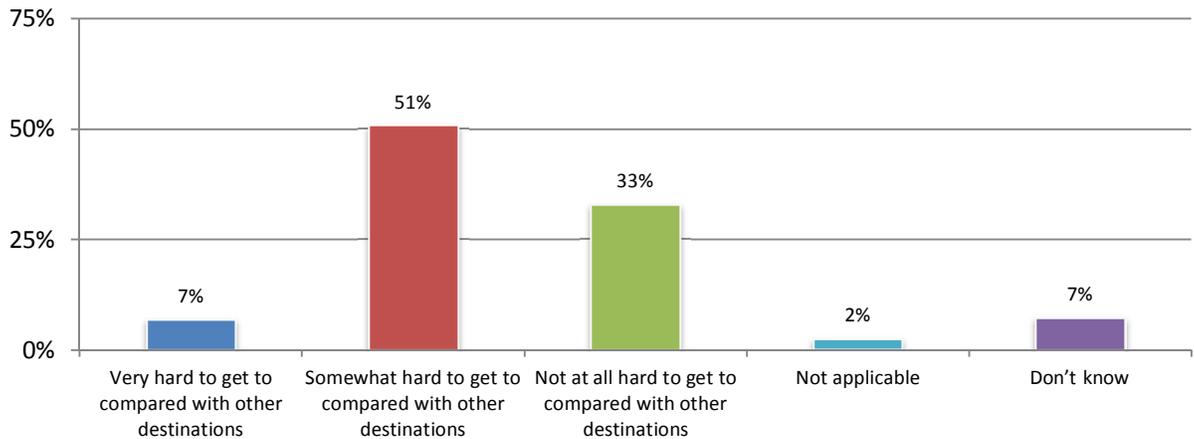
Figure 12
Agreement with Positive Statements
(Base = Visitors)



I. Difficulty Accessing Mendocino County

- The survey asked both visitors and non-visitors for their perceptions of how difficult Mendocino County is to reach compared with other destinations.
- Over half of respondents (61%) indicated that Mendocino County is hard to reach; most of these (54%) felt it was somewhat difficult to reach, while only 7% felt it was very difficult to reach.
- About a third (34%) felt that Mendocino County is not at all difficult to reach.
 - Interestingly, this varied little between visitors and non-visitors.
 - Those from outside California were the most likely to feel that Mendocino County is not at all hard to reach (37%), closely followed by those from Northern California (36%); this was notably higher than those from Southern (30%) and Central California (29%).

Figure 13
Perceived Difficulty in Reaching Mendocino County
(Base = All Respondents)

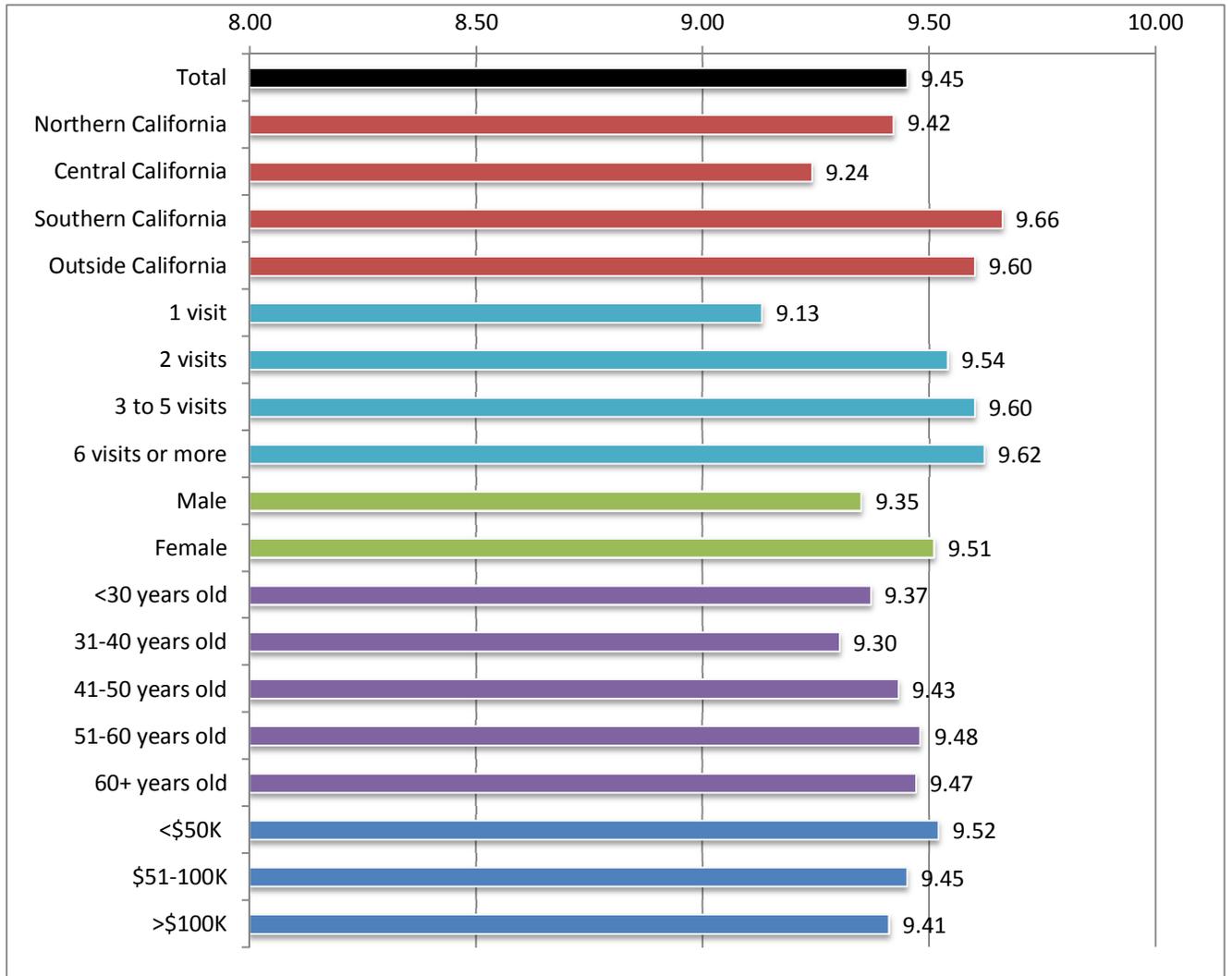


J. Net Promoter Score

- Net promoter scores measure the loyalty a customer has for a provider. For this survey, visitor respondents were asked to provide the likelihood that they would recommend Mendocino County to a friend or colleague on a scale of 1 (not at all likely) to 10 (very likely).
- Results were incredibly positive, with visitors averaging a score of 9.45. Overall, 74% of respondents selected the highest score (10). No respondents selected the bottom two boxes (rating of 1 or 2), and only 2% selected a score of less than 5.

- Accordingly, scores were very high among all groups. Differences among respondent groups were generally minor.
- The most notable variation occurred by number of visits, from 9.13 among single-visit respondents to 9.62 among those visiting 6 or more times.
- Those visiting from further away (Southern California and outside of California) had highest net promoter scores (9.66 and 9.60, respectively) compared with those from Northern (9.42) or Central California (9.24).
- Overall, older respondents had higher net promoter scores, with those above 50 giving the highest score (9.47) and those between 31 and 40 gave the lowest score (9.30).
- Net promoter scores decreased slightly as income increased, from 9.52 among those earning less than \$50,000 to 9.42 among those earning \$100,000 or more.
- Female respondents gave slightly higher scores (9.51) than men (9.35).
- Scores did not vary notably by marital status or family status.

Figure 14
Net Promoter Score
(Base = Visitors)



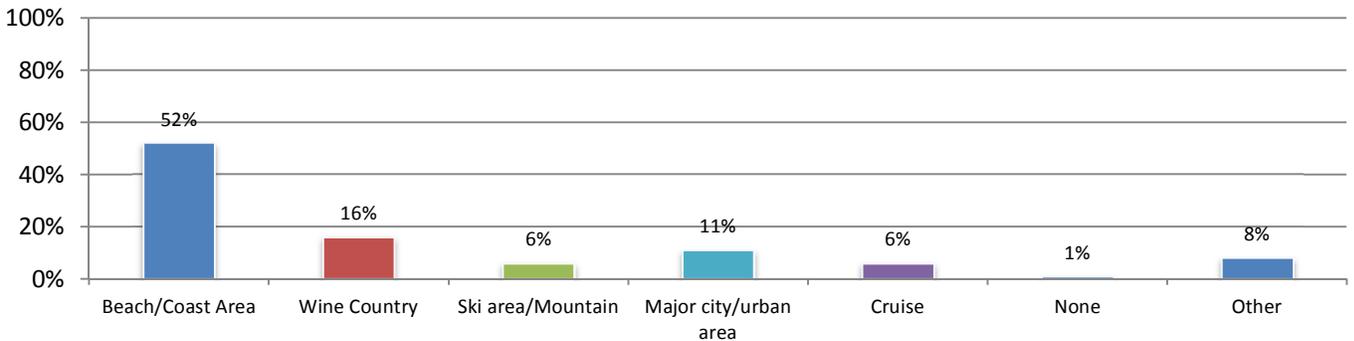
Part 3: Future Travel

The survey asked both visitor and non-visitors respondents about preferred destination types for future travel, the likelihood of taking a trip to Mendocino County in the next 2 years, and the influence of various attributes in their decision to take a future trip to Mendocino County.

A. Preferred Destination Types

- The survey asked respondents about the types of destinations they are most likely to visit in the next two years.
- Just over half of respondents (52%) selected beach/coastal destinations, followed distantly by wine country (16%), major city/urban area (11%) and cruise and ski area/mountain destination (6% each).
- Only 1% of respondents stated that they would not take any overnight trips in the next 24 months.
- Results were mostly consistent between visitors and non-visitors, although visitors were somewhat more likely to select beach/coastal destination (56%, compared with 45% among non-visitors).

Figure 15
Future Travel Destination Types (in %)
(Base = All Respondents)



B. Likelihood of Visiting Mendocino County

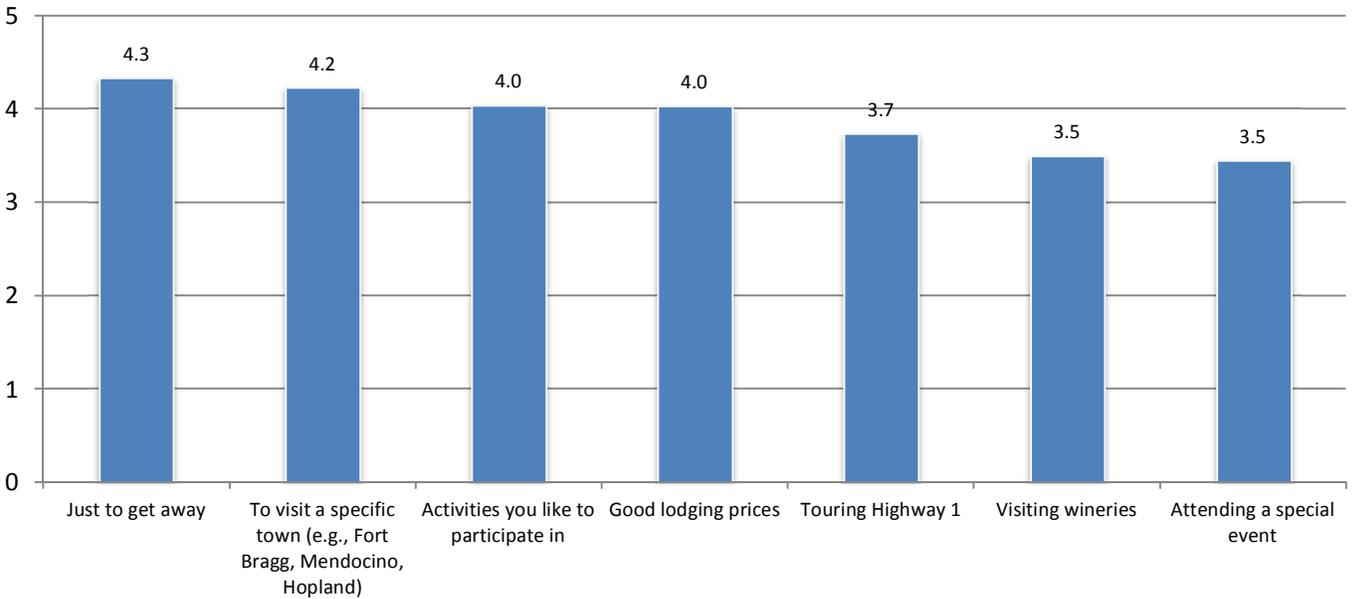
- Respondents rated the likelihood that they would visit Mendocino County within the next two years on a scale from 1 (not at all likely) to 5 (very likely).
- Overall, respondents averaged a rating of 4.2 out of 5, which indicates a high likelihood.
 - Only 7% of respondents indicated that they were unlikely to take an overnight trip to Mendocino in the next two years.
 - Visitors were significantly more likely to anticipate a future visit (4.5) than non-visitors (3.7).

- Likewise, likelihood of visiting in the future increased with number of visits, from 4.2 among single-time visitors to 4.8 among those who had visited 3-5 times.
- Respondents from Northern California were more likely to visit in the future (4.33) than other respondents, particularly those from Central California (3.7) and outside California (3.8).

C. Influencing Attributes

- Respondents rated several attributes on the level of influence each would have on their decision to take a future trip to Mendocino County on a scale from 1 (no value) to 5 (tremendous value).
- Overall, each attribute had a positive rating, with "just to get away" having the highest (4.3), followed by visiting a specific town (4.2), activities (4.0) and good lodging prices (4.0).
- "Attending a special event" and "visiting wineries" had the lowest ratings (3.5 each).
- Overall, visitors rated visiting a specific town slightly higher (4.4) than non-visitors (4.1).

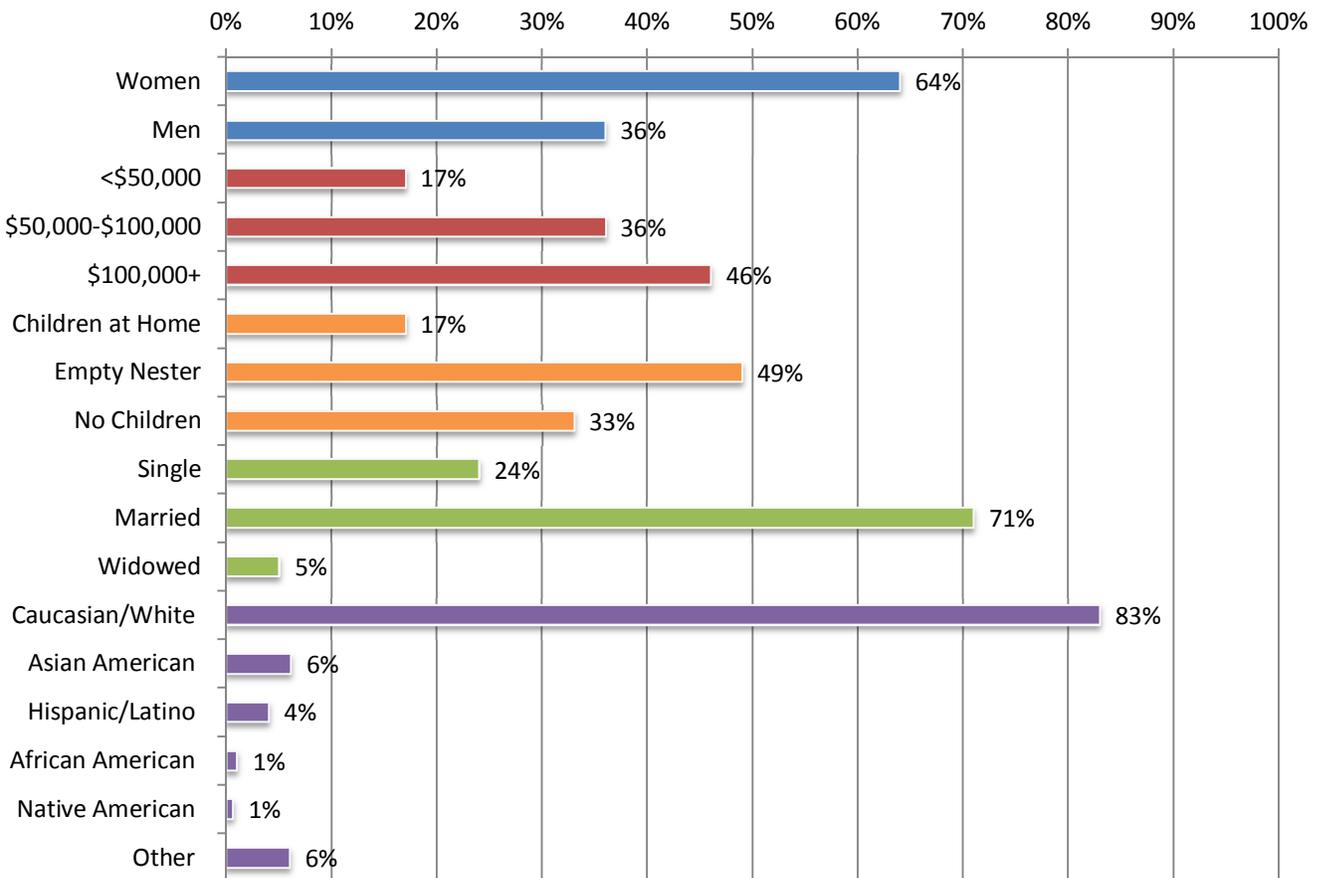
Figure 17
Future Mendocino Travel Influencing Factors
(Base = All Respondents)



Part 4: Respondent Profile

- The respondent sample represented a mix of genders, household incomes, ethnicities, marital and family types and regions.
- The sample included 64% women and 36% men.
- The sample was distributed across incomes, with approximately 17% earning \$50,000 or less, 36% earning between \$50,000 and \$100,000, and 46% earning more than \$100,000.
- Most respondents were white (83%), followed by Asian American (6%), Hispanic/Latino (4%), African American (1%) and Native American (1%).
- Only about 17% of respondents reported having children at home, compared with 49% who were empty nesters and 33% who had no children. 71% were married, followed by 24% who were single and 5% who were widowed.

Figure 18
Respondent Demographics (in %)
(Base = All Respondents)





The Strategic Marketing Group is a Tourism, Recreation and Hospitality consulting firm.
For more information:

www.smgonline.net