

# Visit Mendocino County

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Website Influence Study 2022/23  
Final Report



# Table of Contents

Overview	3
Survey Results	14
Spending and Economic Impact	42
Efficiency Measures	51
Scenario Analysis	53

# Overview

- One of the biggest challenges for Destination Marketing Organizations (DMOs) is the issue of measurement. While many DMOs are able to measure their effectiveness at the program level including such measurements as website user sessions, bounce rates, and social media programs, the biggest challenge remains. Namely how to measure the organization's effectiveness through the number of room nights generated, the amount of revenue generated and the return on the invested capital.
- To that end we believe many of the challenges stem from the failure to understand what DMOs are responsible for. Are they responsible for generating transactions for room nights? Are they responsible for branding and advertising awareness? Are they responsible for influencing consumer decisions to visit a destination? Often the issue of accountability is not clearly understood or discussed. As a result, many DMO's fall back on using broad measurements like occupancy or average daily rate data generated by the local jurisdiction, or data from an outside provider like Smith Travel.

## Overview Continued

- This is a comprehensive approach to macro level DMO measurement. This approach is based on the core premise that **the primary duty of the DMO is to create awareness and influence prospective visitors to visit the destination.** Once a DMO has accomplished that, the consumer is free to book a trip with any number of sources, including property direct or an online travel agent.
- The key is to understand **how a DMO measures its influence on potential visitors to the destination.** To that end, we believe it is the role of the DMO to use the appropriate marketing mix to drive as many potential visitors as possible to its website to present the destination in such a way that consumers are influenced to visit the area.

# Project Goal & Objectives

- **Project Goal:**

- To assist Visit Mendocino County in measuring their efforts to **generate a return-on-investment metric that effectively identifies the travel spending generated within the destination.**

- **Project Objectives:**

- Determine the influence of Visit Mendocino County marketing efforts on the consumer decision making process to visit the area.
- Estimate the economic impact and return on investment of website users.
- Identify key visitor characteristics.
- Identify the effectiveness and efficiency of the Visit Mendocino County marketing programs to generate unique visitors to their website.
- Utilize the results of the information to inform strategies and continually improve the effectiveness and efficiency of the organization's marketing programs thus improving invested capital return on investment.



## Website Overview

- The **VisitMendocino.com** website is the primary tool in which consumers can connect with the destination.
- The primary purpose of the website is to influence consumers to visit the destination by providing visitors with information and direct access to **lodging, dining and attractions** in order to educate people to ultimately book a trip to Mendocino County.
- An important secondary objective is database development by **signing up for newsletters and ongoing contact thus creating a marketing asset.**
- VMC continues to seek improvements of the website to improve efficiency and productivity to enhance the competitiveness of the destination.

# Methodology

- A total of 1,623 emails were collected between July 1, 2022, and March 30, 2023, and an email survey was sent to the entire accumulated email database list in November 2022.
- Of these, 443 people participated and completed the survey, with approximately a 27% response rate.
- Participants were sent email reminders to participate in the survey.
- Participants who completed the survey were entered to win a Visa gift card.

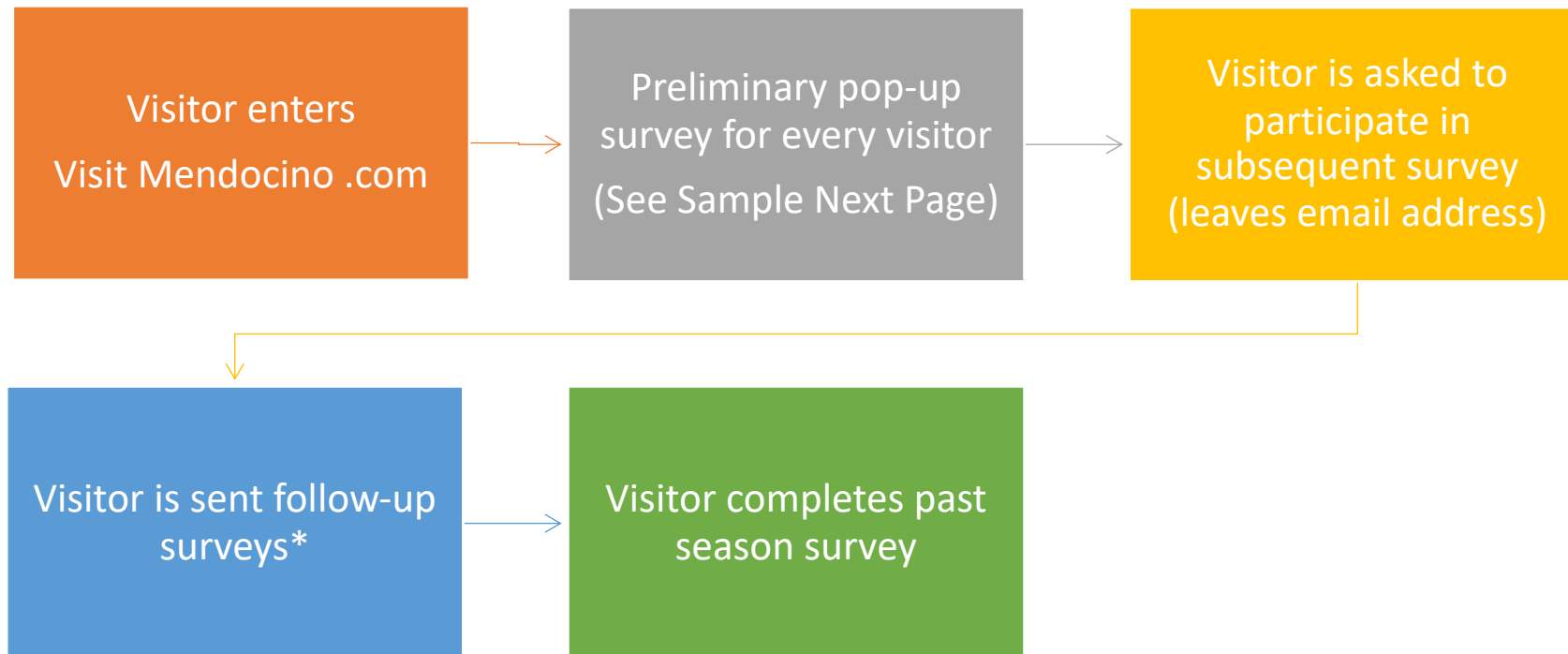
# Mendocino County Tourism Website

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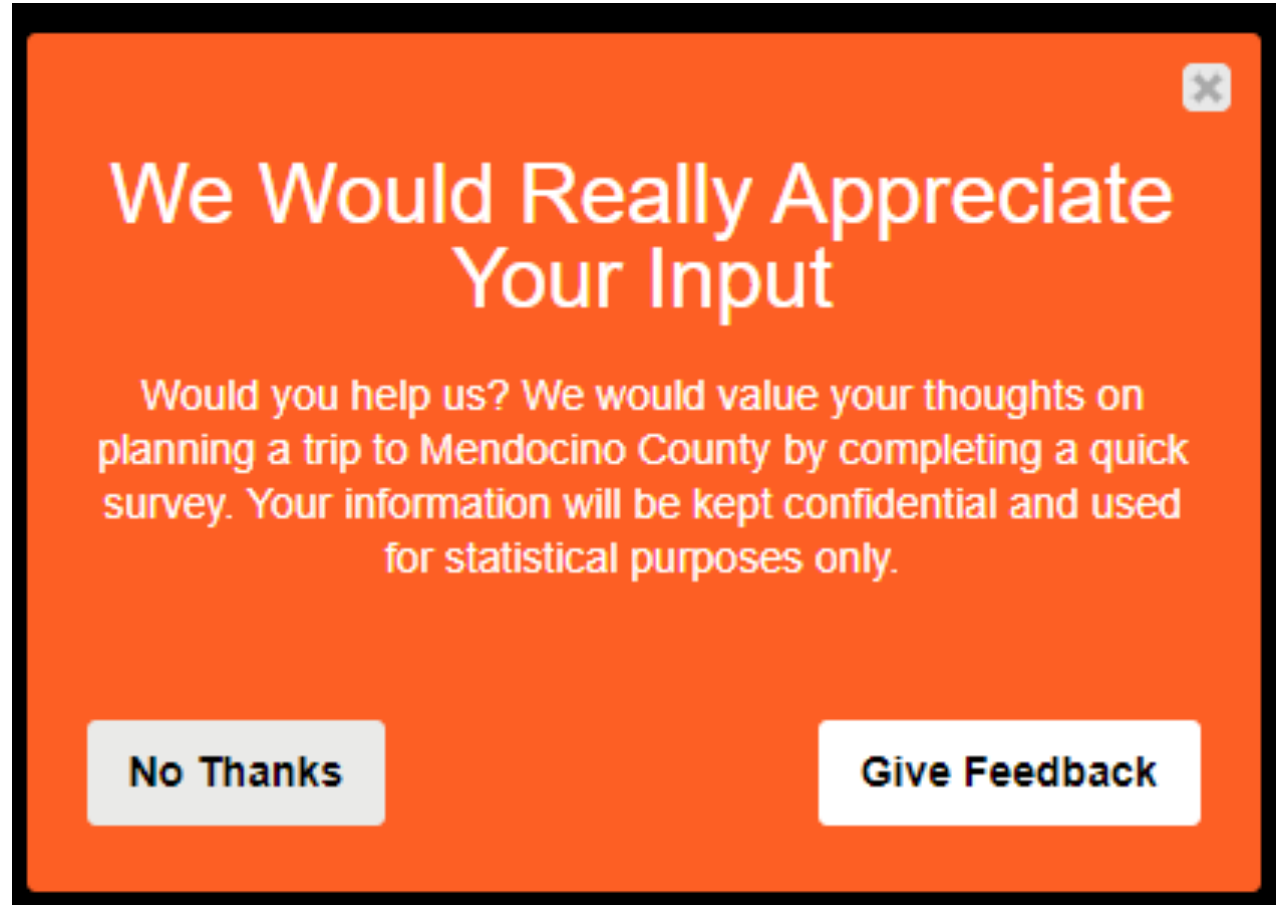


# Participation Flow Chart



\* Multiple surveys are sent to reduce non-response bias

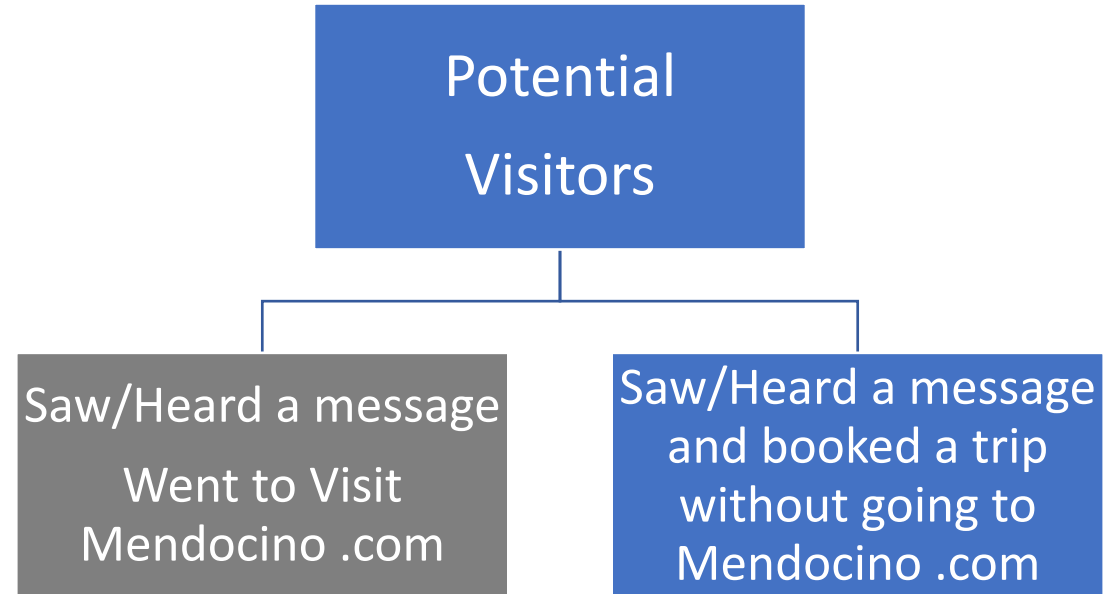
Sample pop-up survey  
featured on  
VisitMendocino.com



# Study Limitations- A Conservative Approach

- This study measures visitors who arrive at the VisitMendocino.com website. This is important because the website is the *most influential tool* available to convert **potential** visitors into **actual** visitors.
- Some potential visitors may see a promotional message, but not go to the website. As such, these may be missed in the analysis.
- Additionally, in an effort to not overstate results, the analysis by design is a conservative approach. For example, the analysis uses only the percentage of respondents that indicate they were “Definitely/very/somewhat influenced” to visit. As such VMC does not claim they influenced everyone who went to the website.

Note: The study measures what goes through the Visit Mendocino website and this does not include those that may have seen or heard messaging and did not go through the site but did visit. As such, the projections in the report are conservative.



# Key Performance Metrics

1. Overall volume numbers are down slightly, which is probably reflective of economic conditions as well as reduced post-pandemic pent-up demand. Indicates. Despite the macro changes the organization is effective in generating awareness and interest in visiting Mendocino County.

2. At 76.3%, the bounce rate is high. The organization is working several strategies to reduce this rate.

	April 1, 2022- March 31,2023	April 1, 2021- March 31,2022	Change
<b># Sessions</b>	673,863	690,429	-2.3%
<b># Users</b>	541,838	558,715	-3%
<b>Total Page Views</b>	1,113,120	1,225,077	-9%
<b>Page/Session</b>	1.65	1.77	-.06%
<b>Avg. Time on Site</b>	1:04	1:09	-4.7%
<b>Bounce Rate</b>	76.30%	73.86%	4.0%

# Preliminary Findings

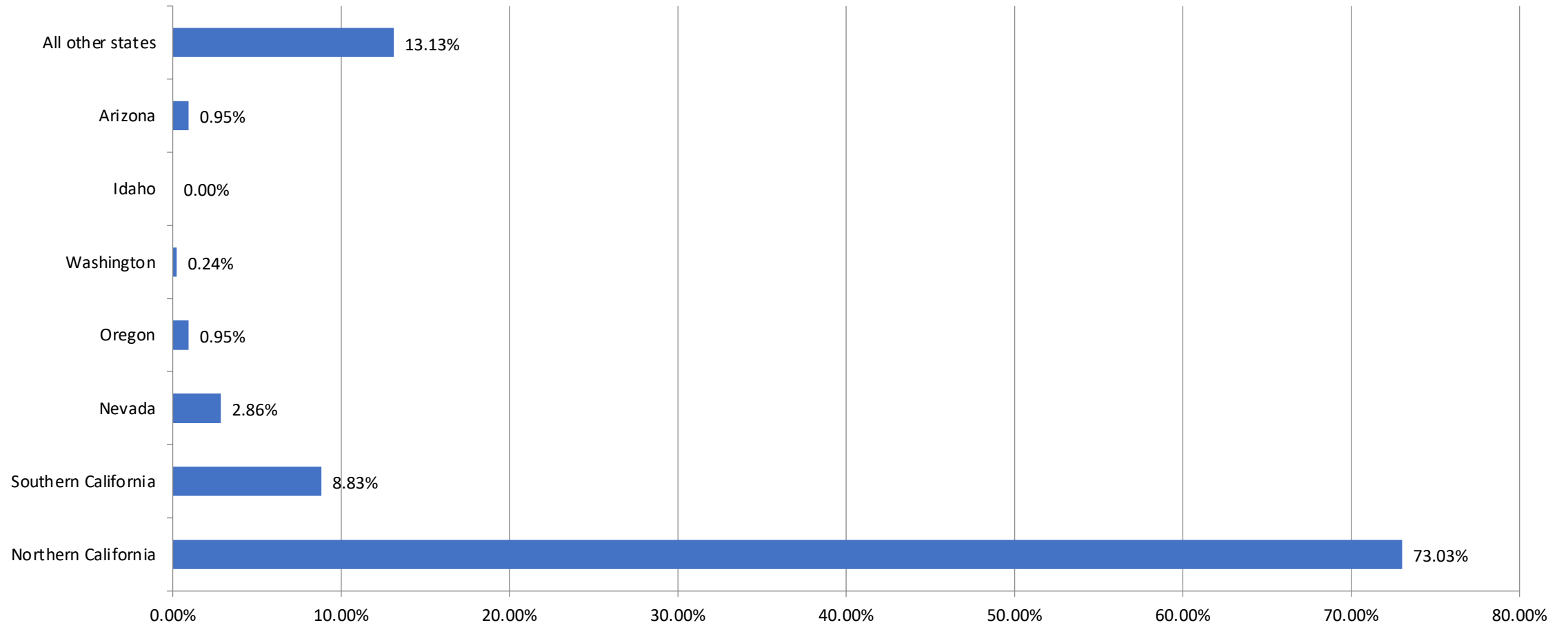
- Despite an anticipated slowdown in post-pandemic travel, the study results are very favorable for the organization.
- For the period under study, it is conservatively estimated the organization generates approximately \$54 million in direct spending and a total of \$77 million in total economic activity.
- It is estimated that these efforts also generate approximately 651 jobs (direct + Indirect+ induced) and generate over \$9.4 M (direct + indirect + induced) in local, state, and federal taxes.

# Survey Results

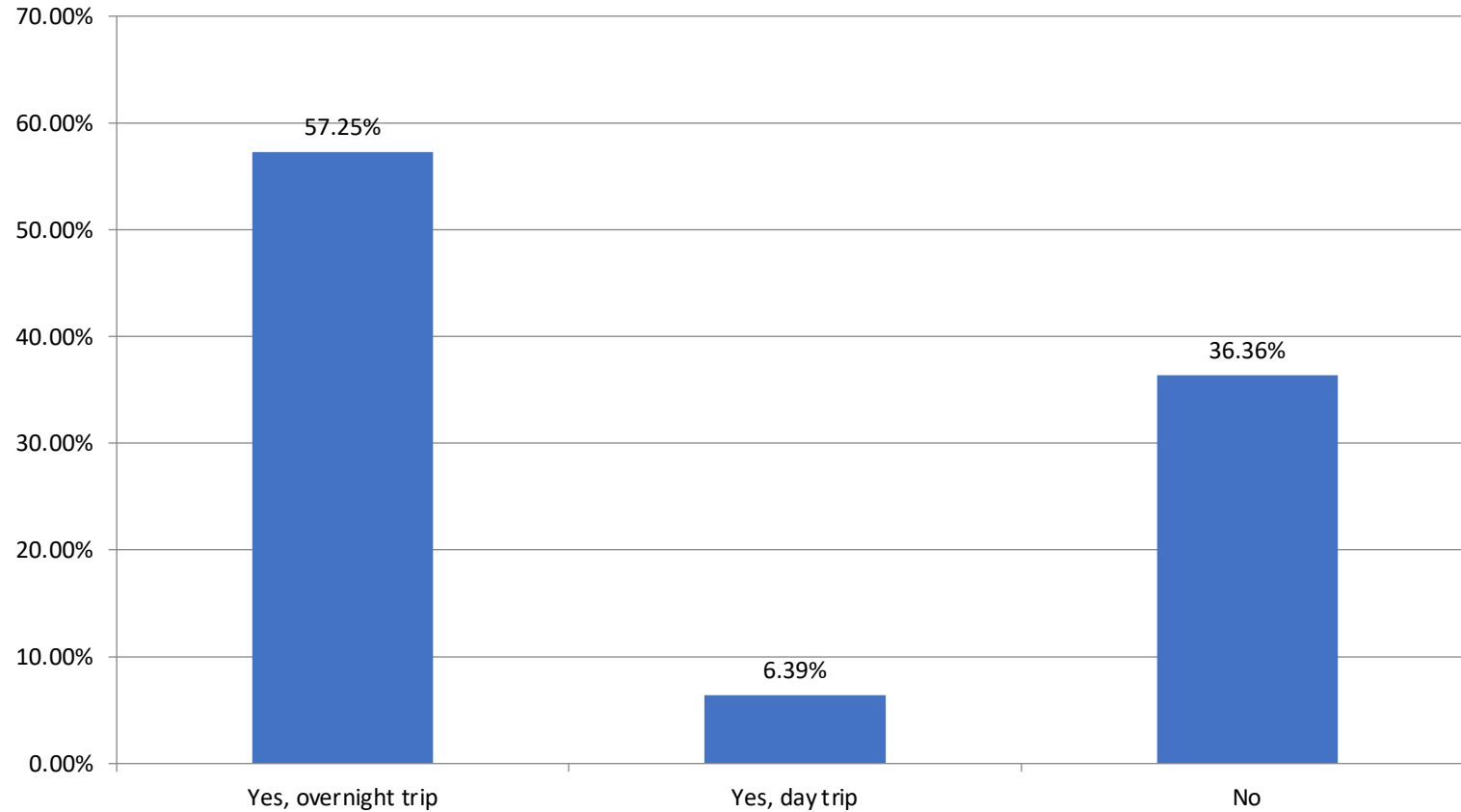
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# Primary Residence

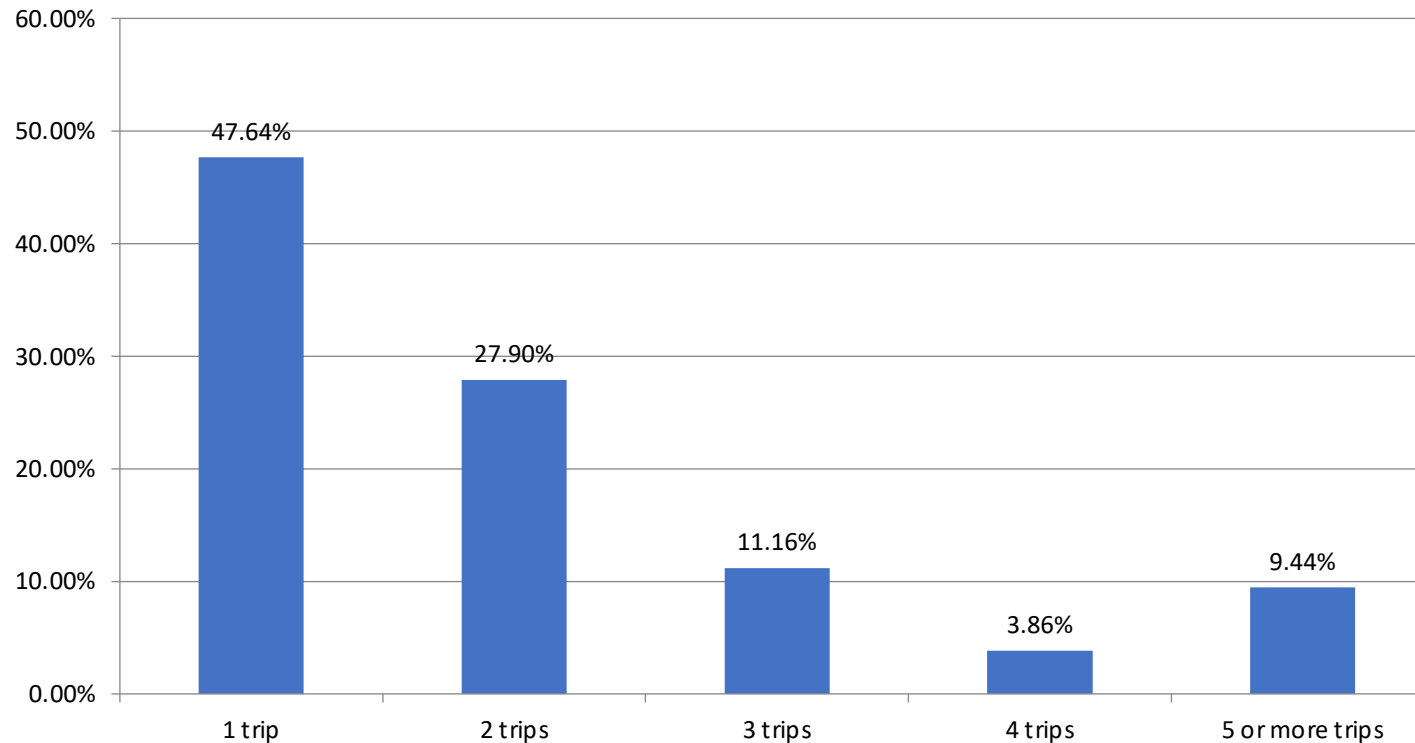


# Have you taken an overnight or day trip to Mendocino County in the past 12 months?

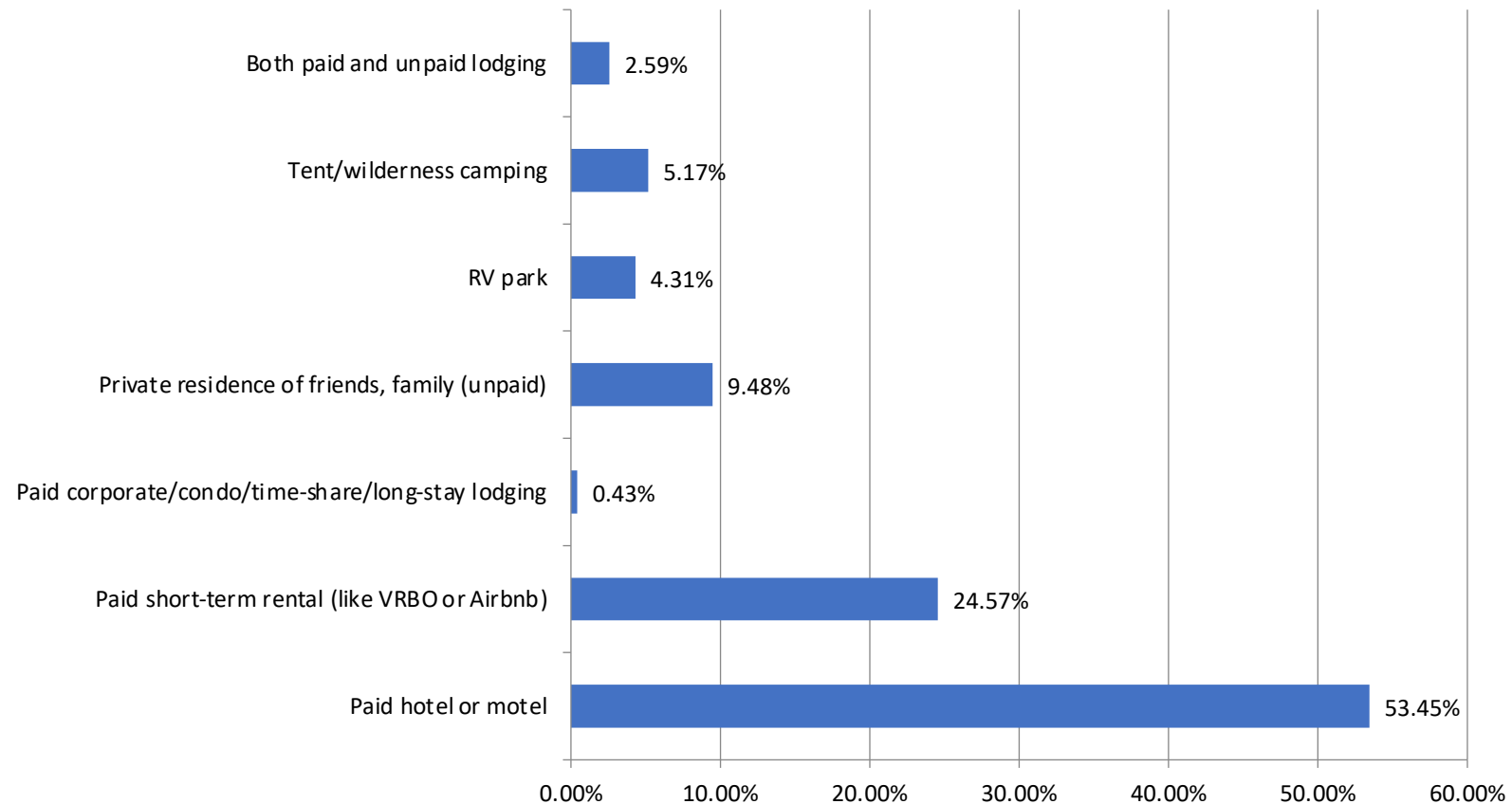




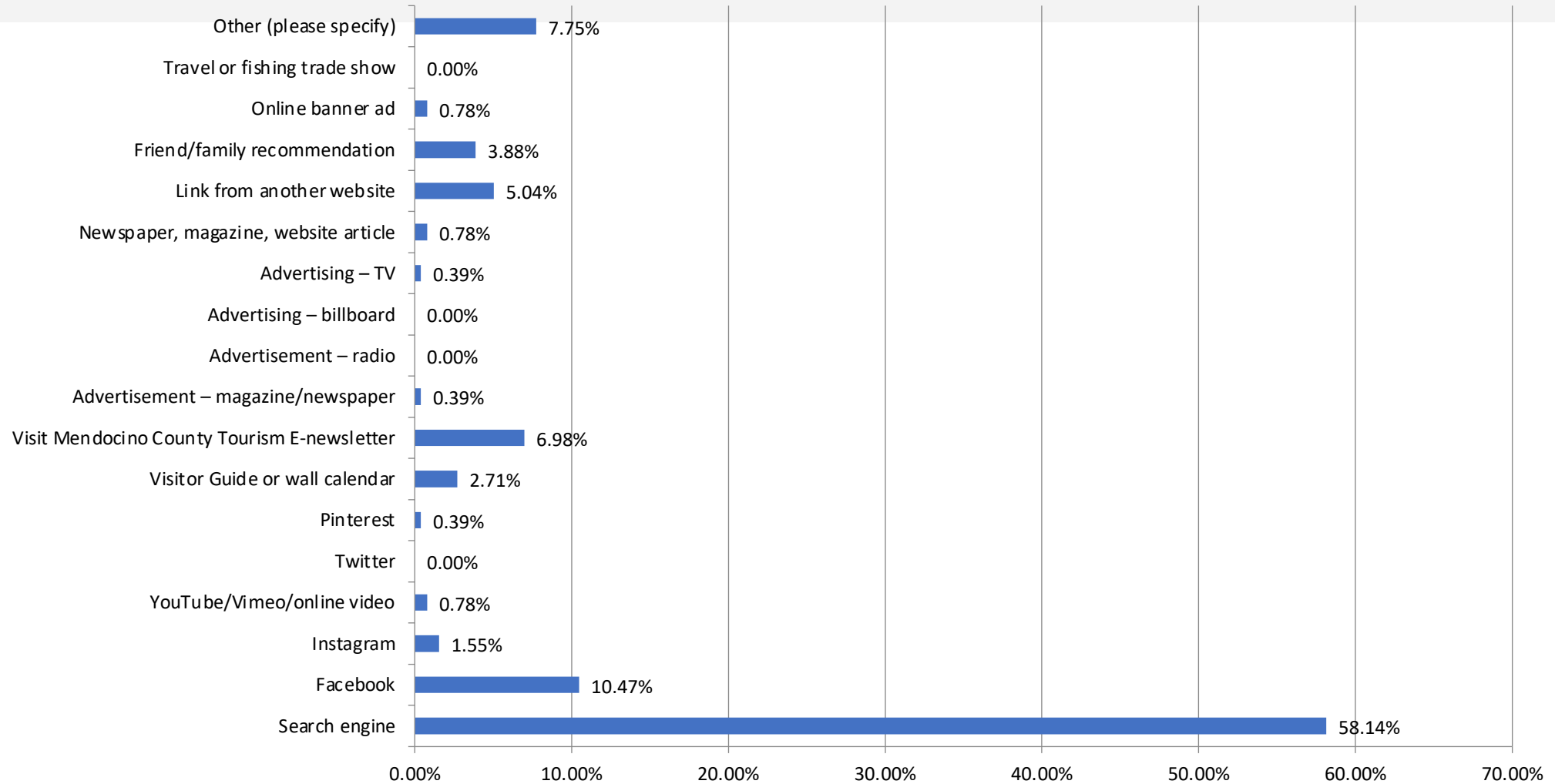
# How many overnight trips to Mendocino County have you taken within the past 12 months?



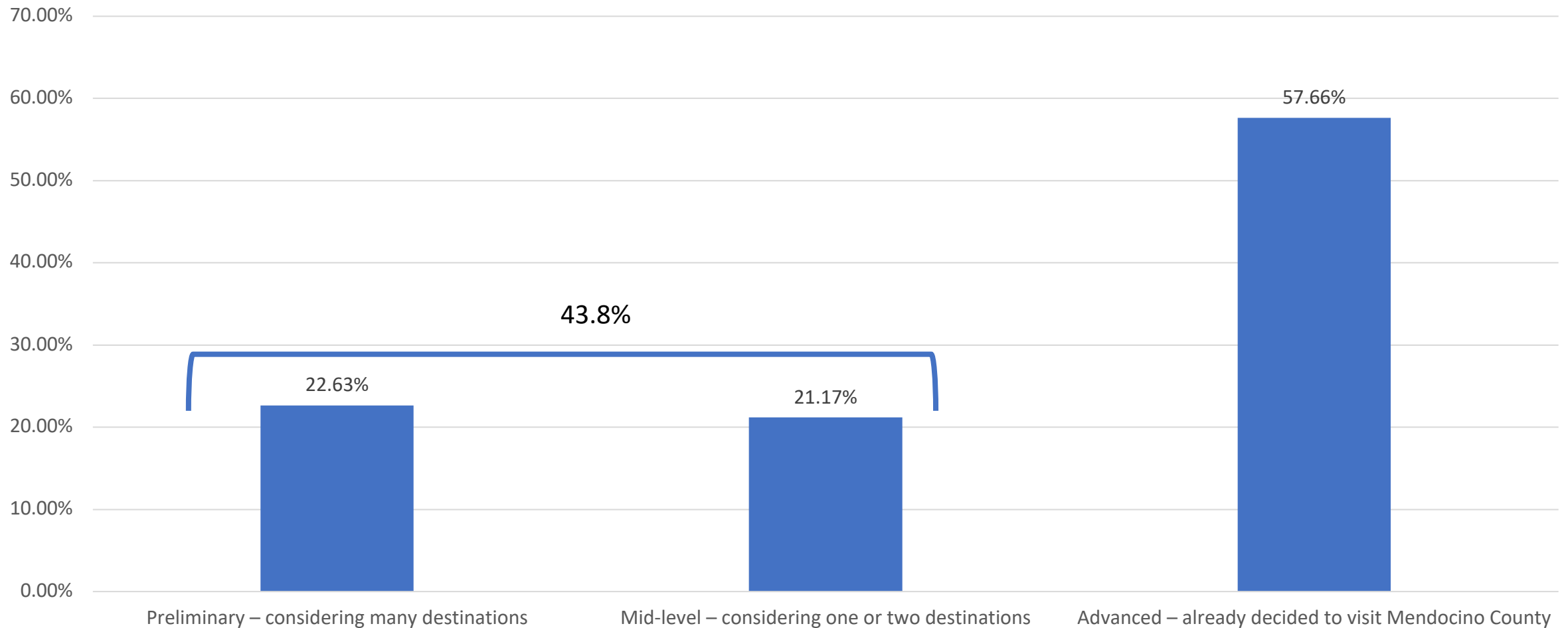
# What type of accommodations did you use while on your last overnight visit to Mendocino County?



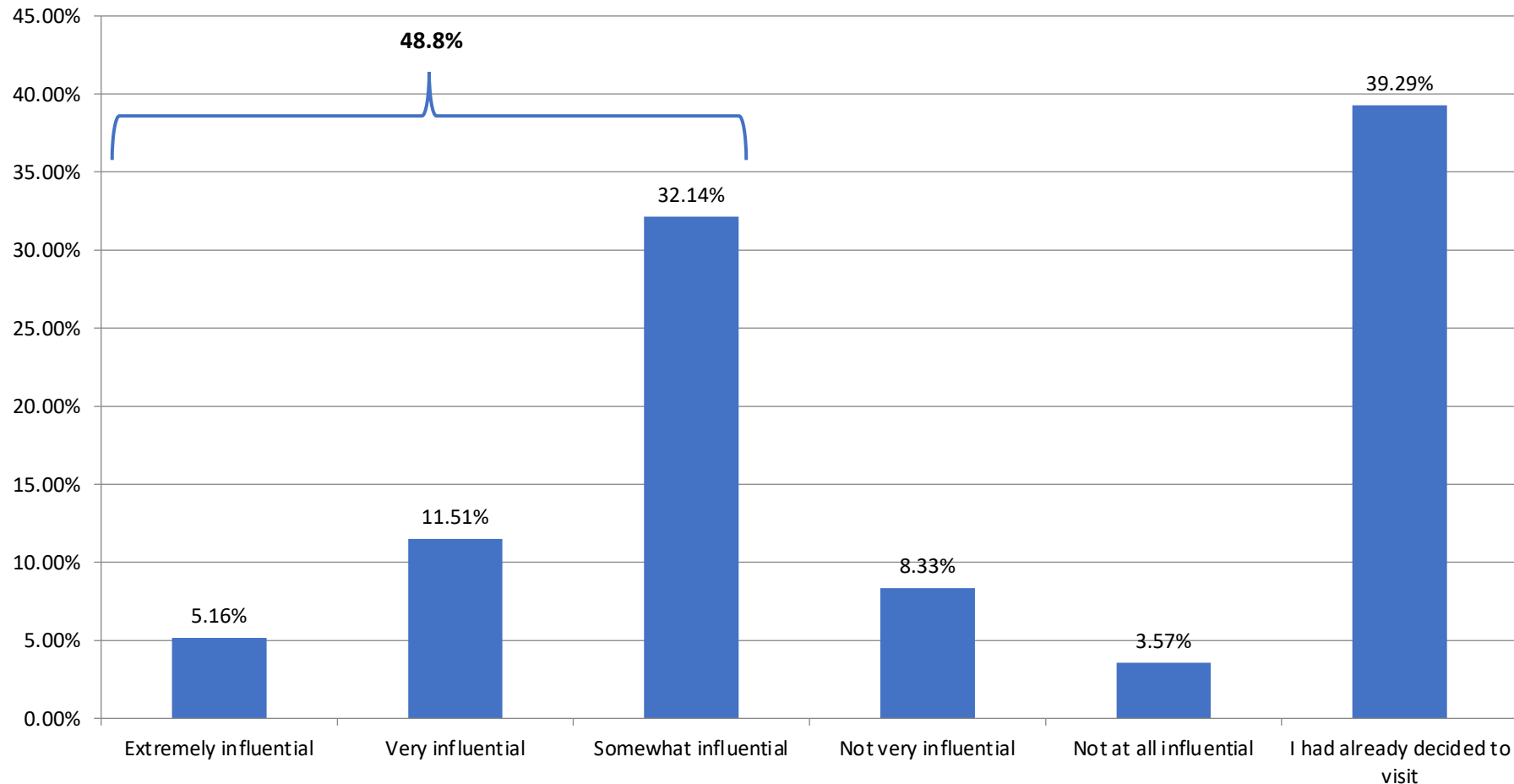
# Do you recall how you found the Visit Mendocino.com website?



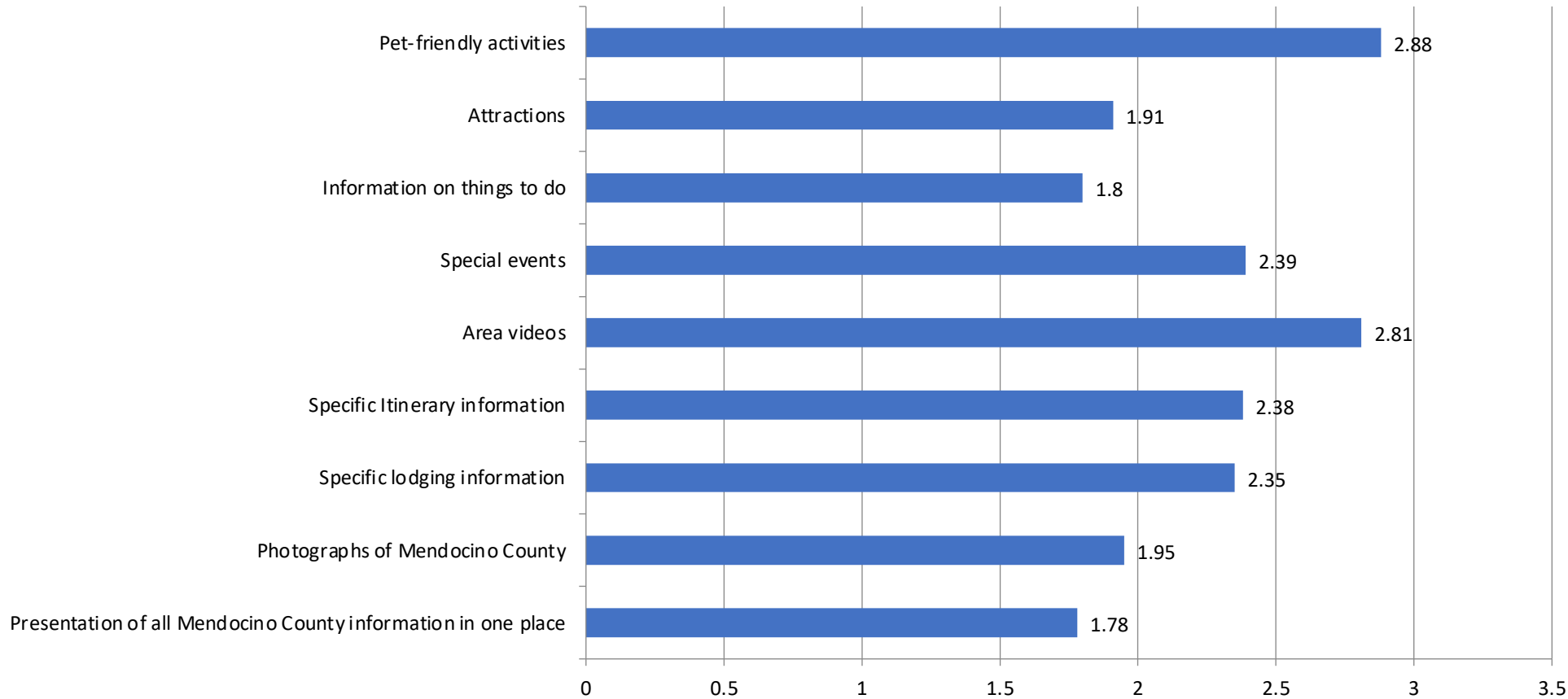
# At what point in your travel decision process did you consult the Visit Mendocino County.com website? (Check one)



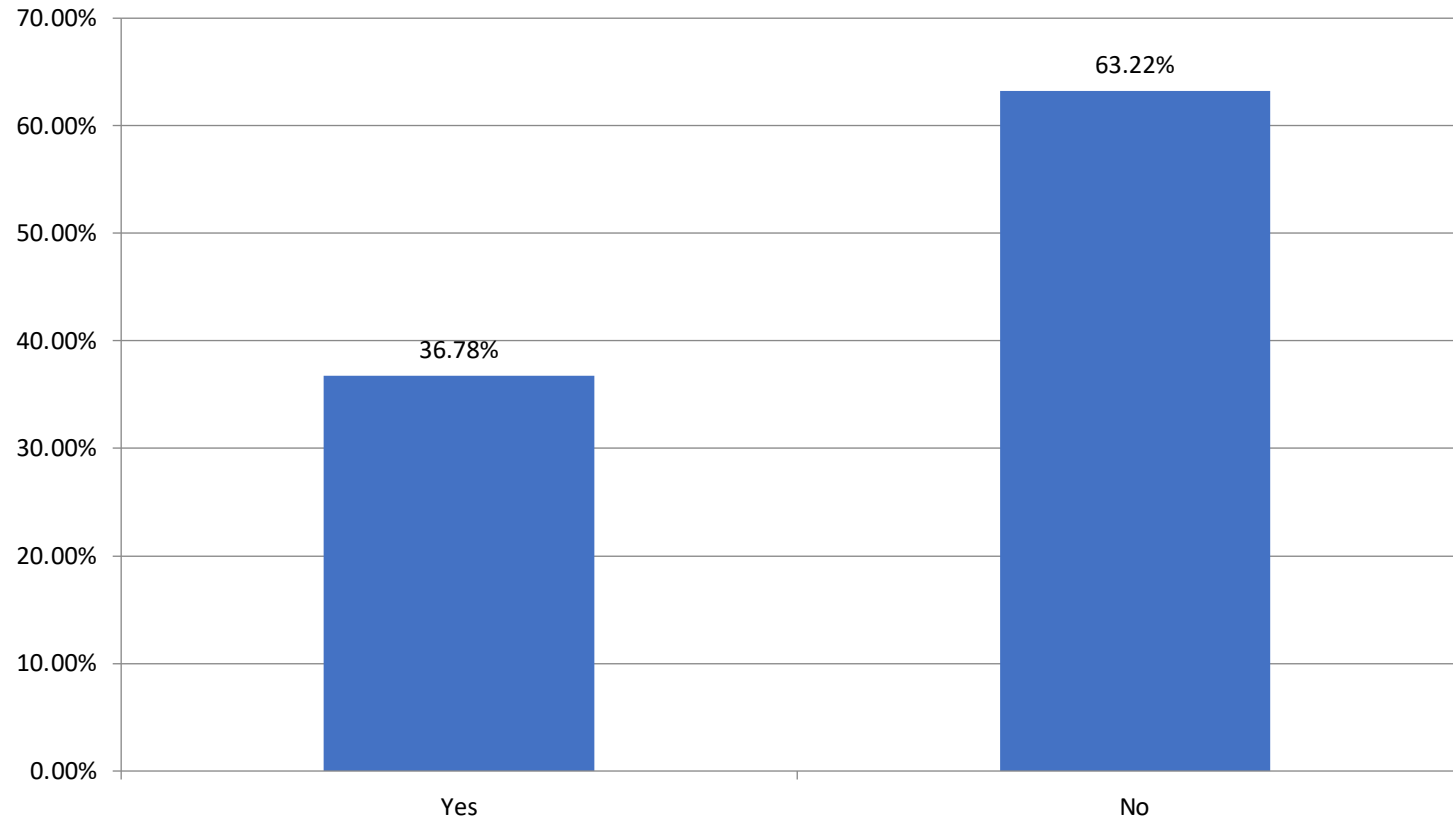
# How influential was the Visit Mendocino.com website in your decision to take an overnight or day trip to visit in the past 12 months?



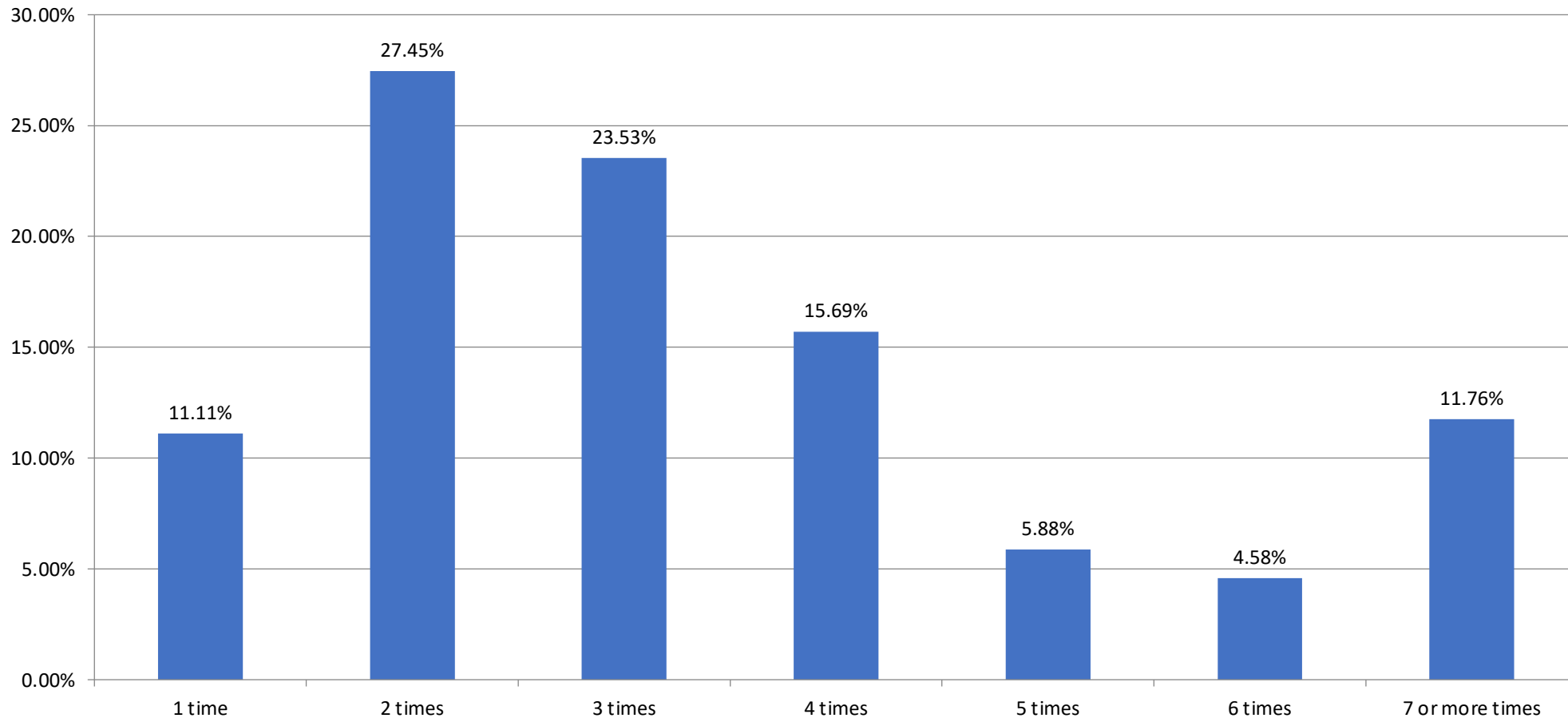
On a scale of 1 to 5, with 1 = very helpful and 5 = not at all helpful, how helpful was each of the following in your decision to take an overnight or day trip to Mendocino County?



# Was this the first time you have visited the Visit Mendocino.com website?

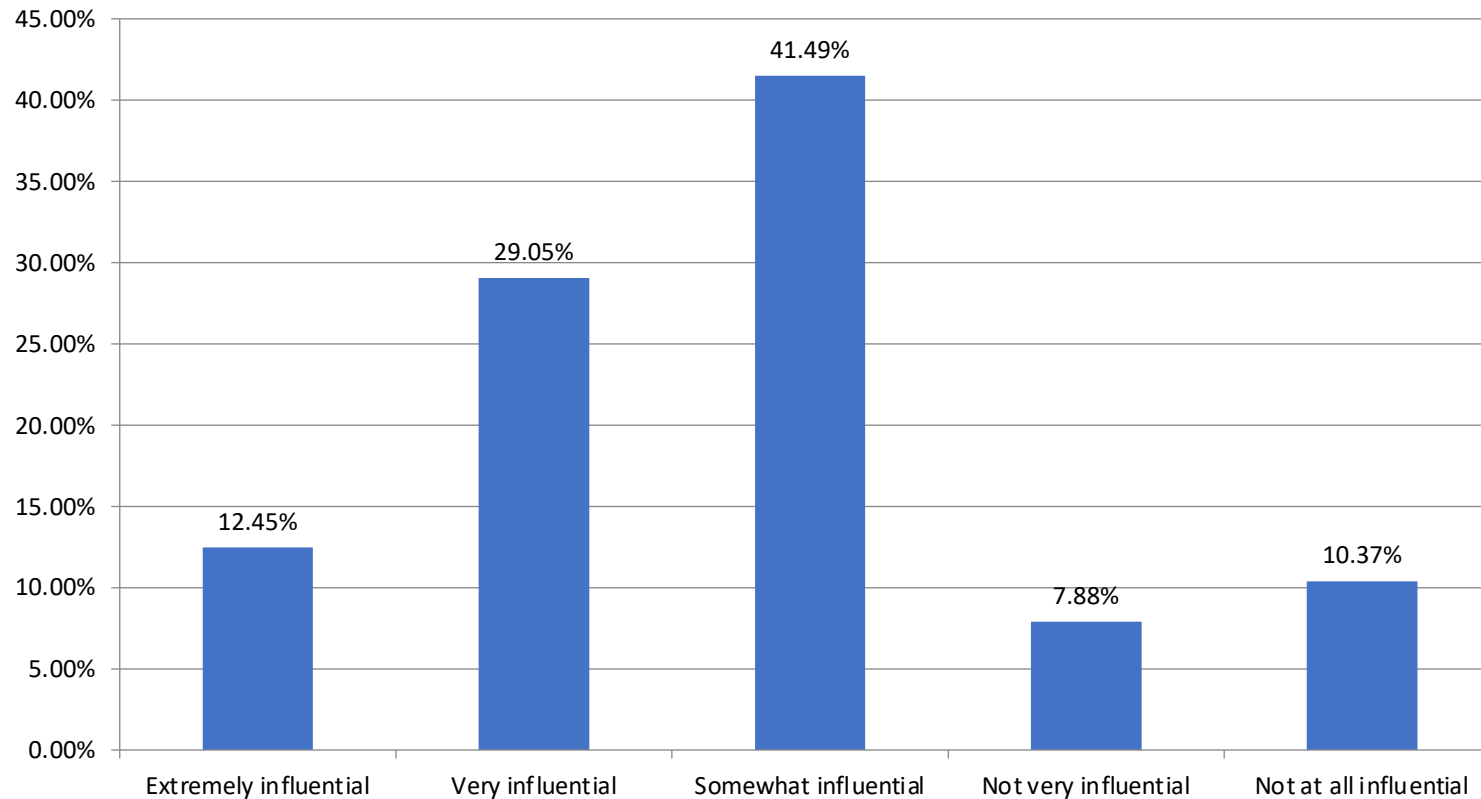


# Do you recall how many separate times you visited the Visit Mendocino website in the past 12 months?

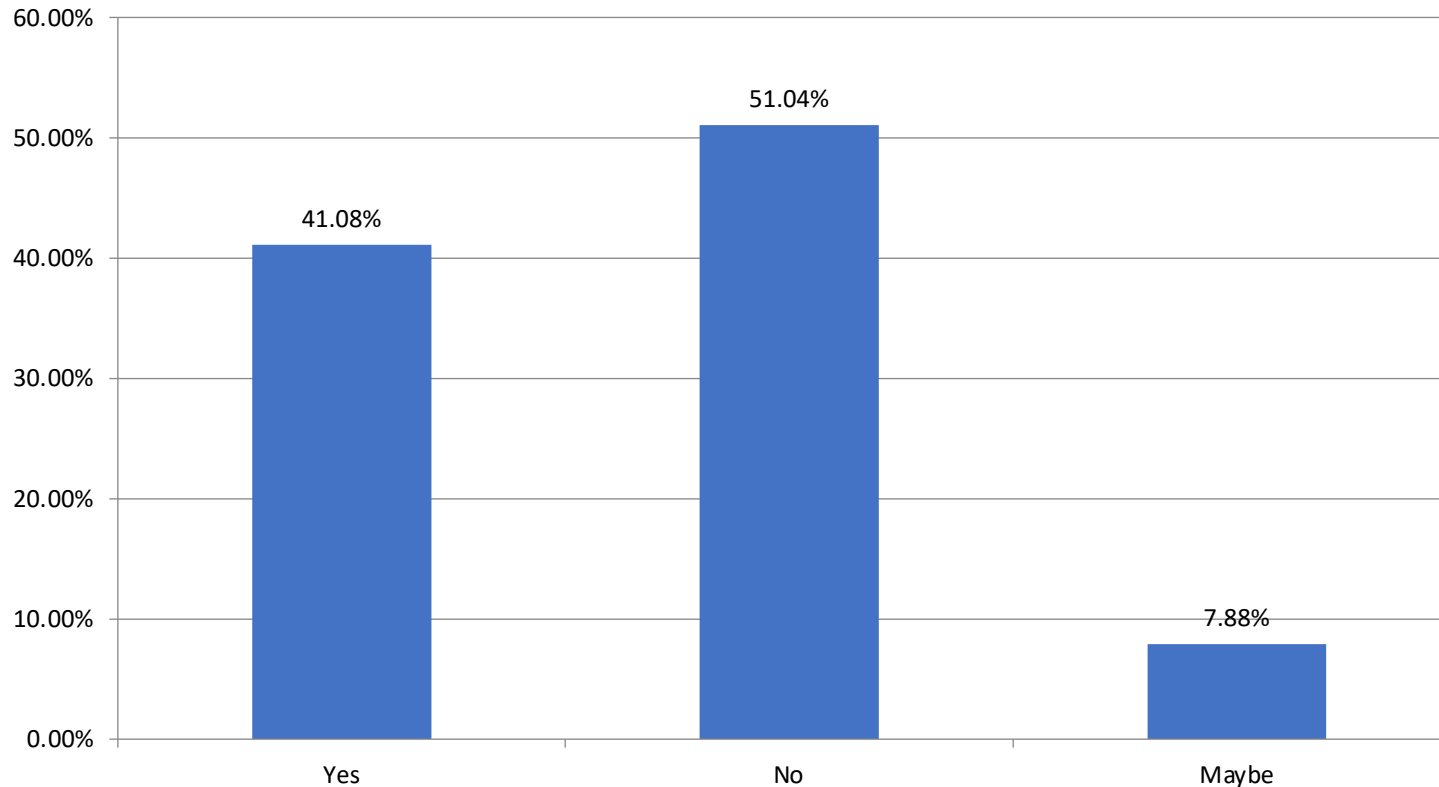




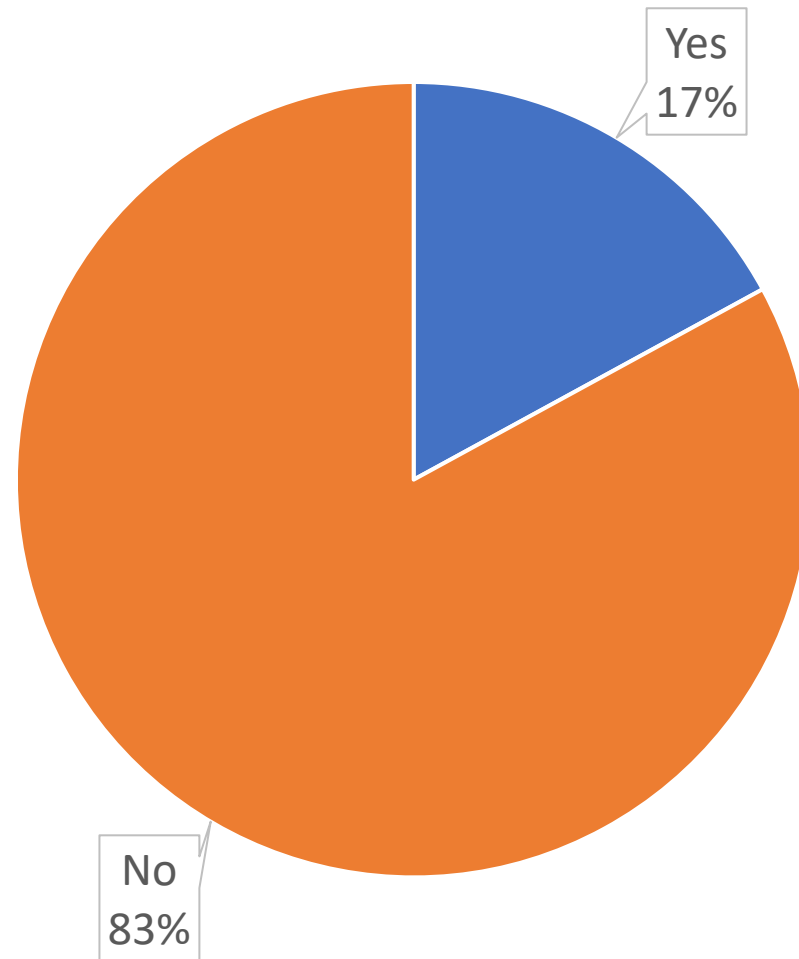
# How influential were the photos and information on VisitMendocino.com in your decision to take a future trip to Mendocino County?



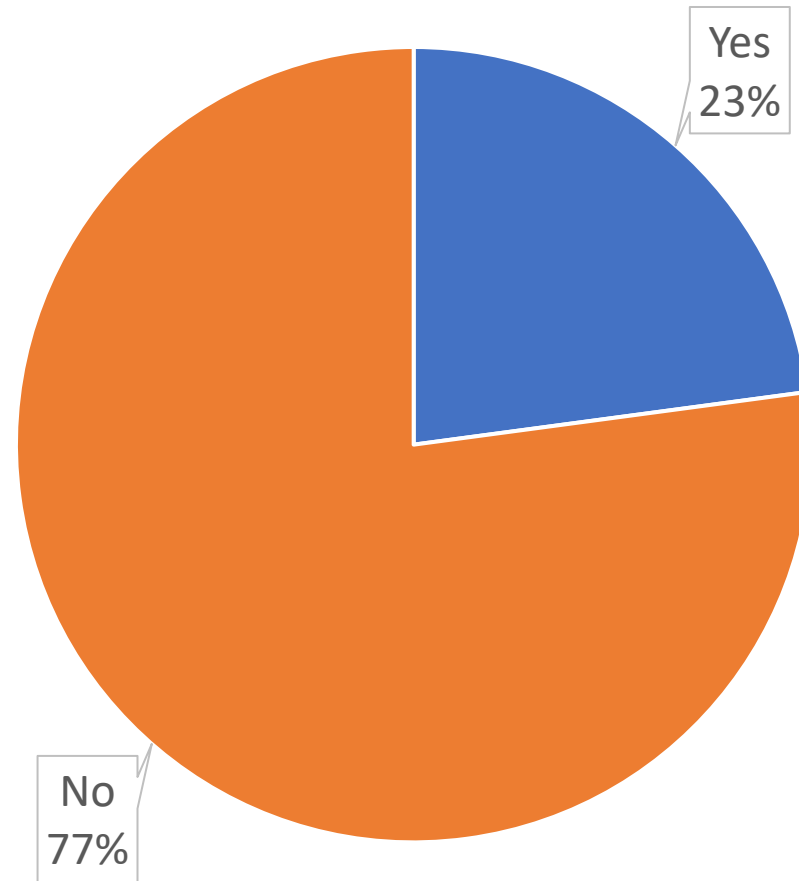
# While you were in Mendocino County, did you post any information or pictures to social media?



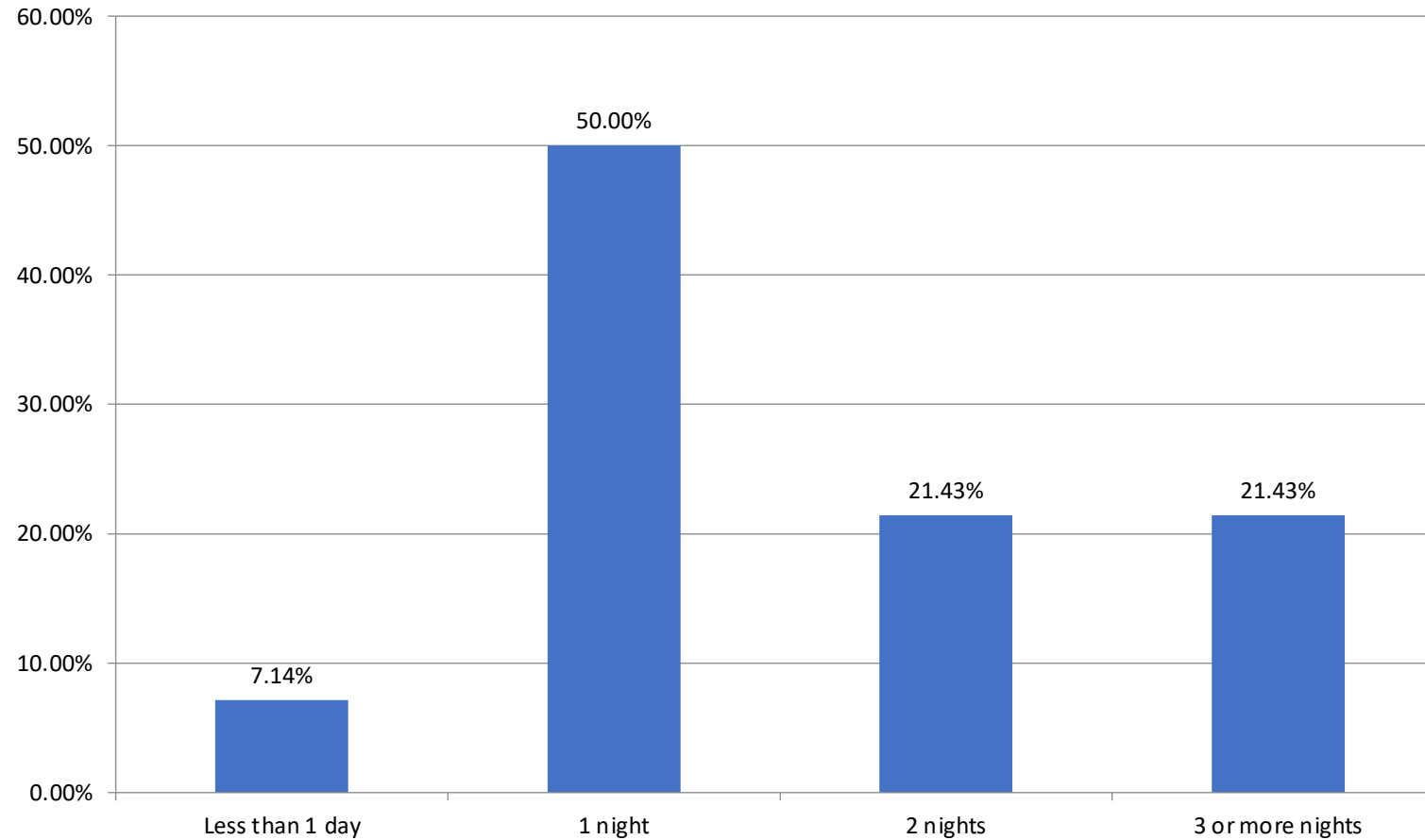
# Did you request visitor information on the website?



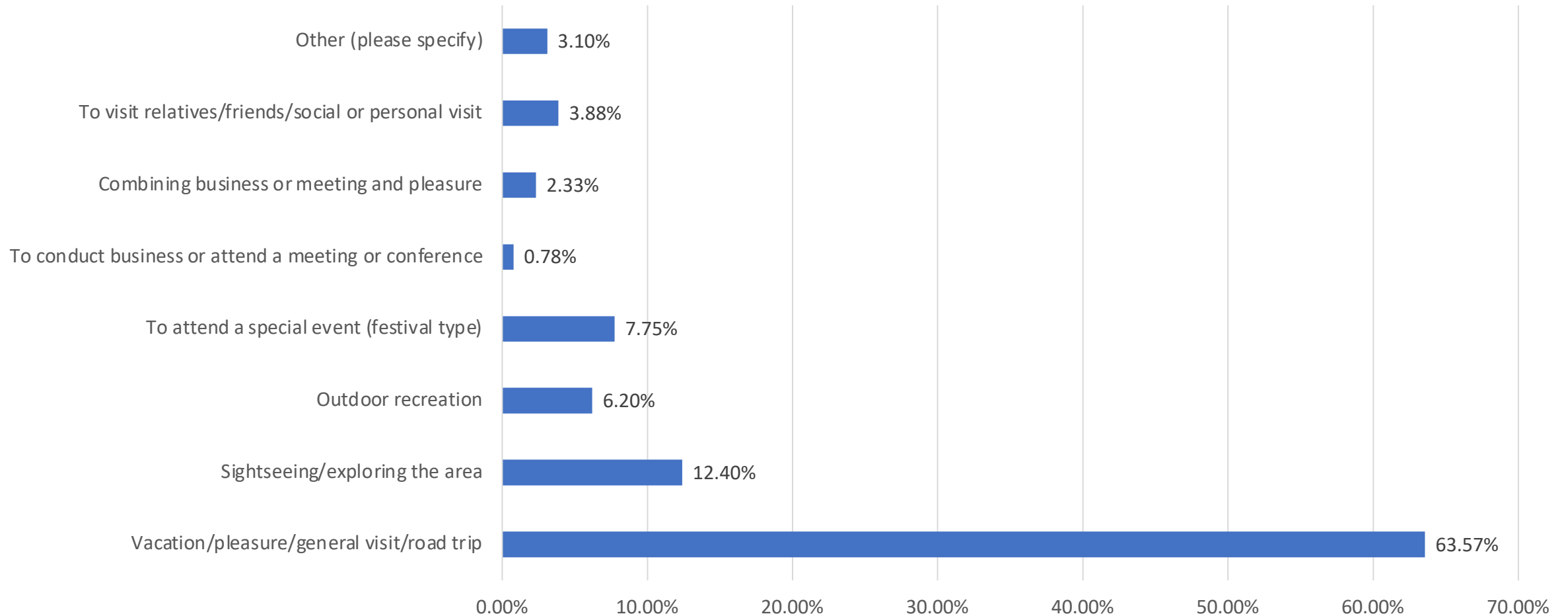
Did the photos/information you reviewed on the Visit Mendocino website encourage you to stay longer than originally intended?



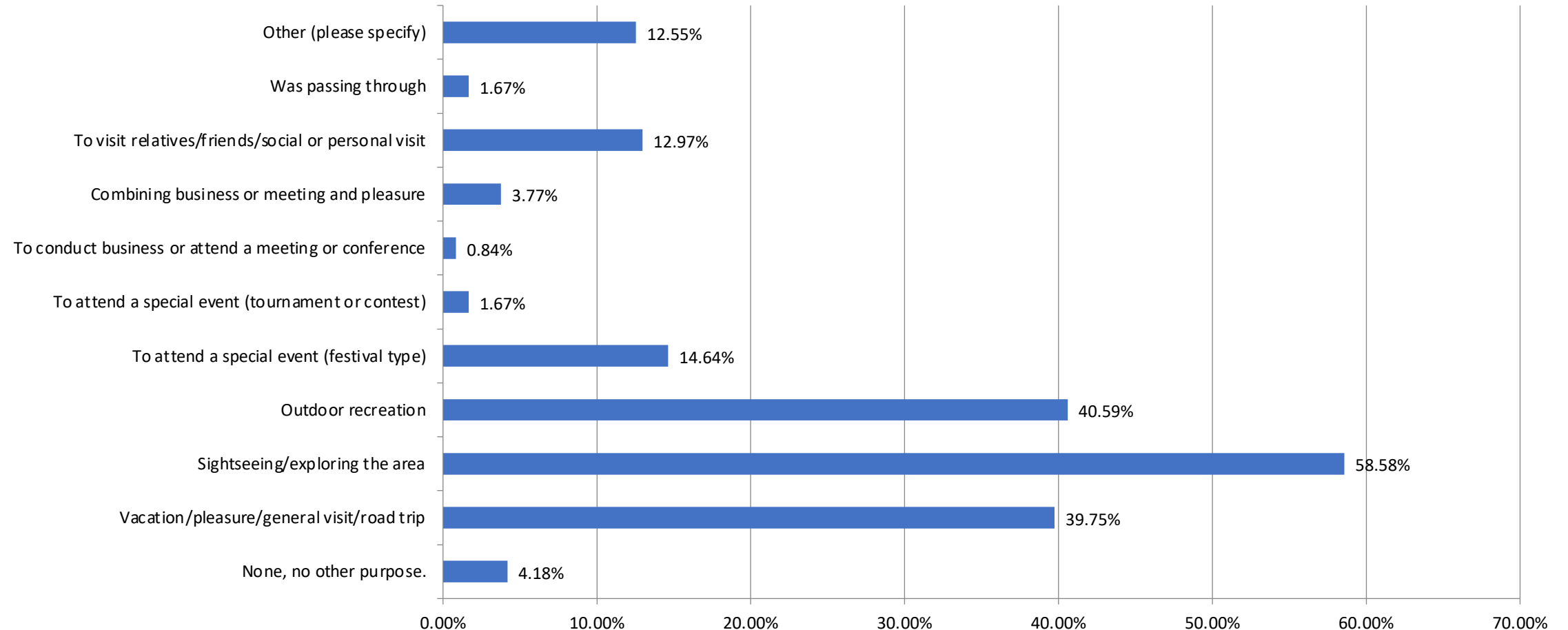
# How much longer?



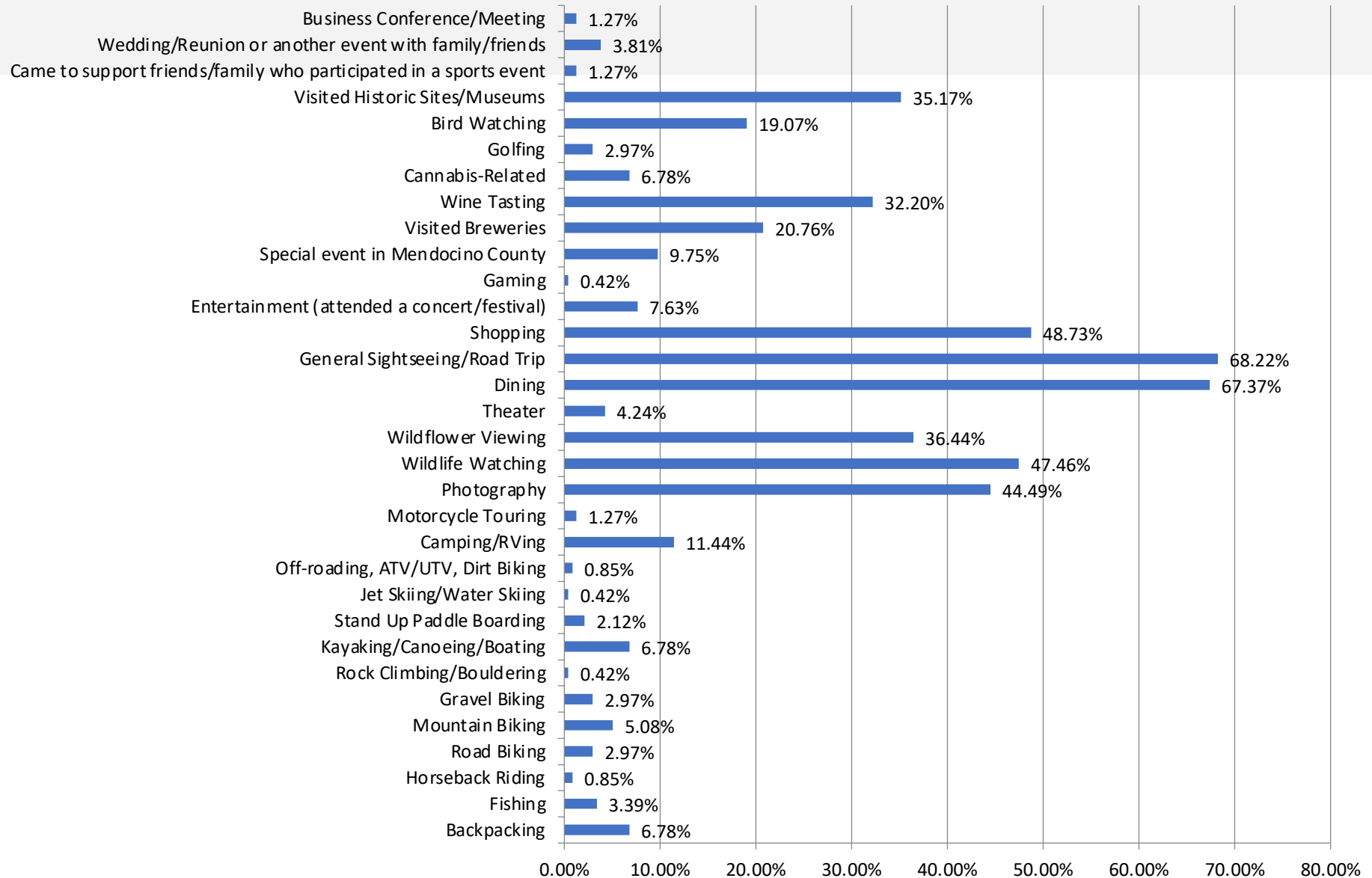
# Which of the following was your MAIN purpose for your most recent visit to Mendocino County? (check one)



# Which of those are your OTHER purposes for visiting Mendocino County? (Check all that apply)

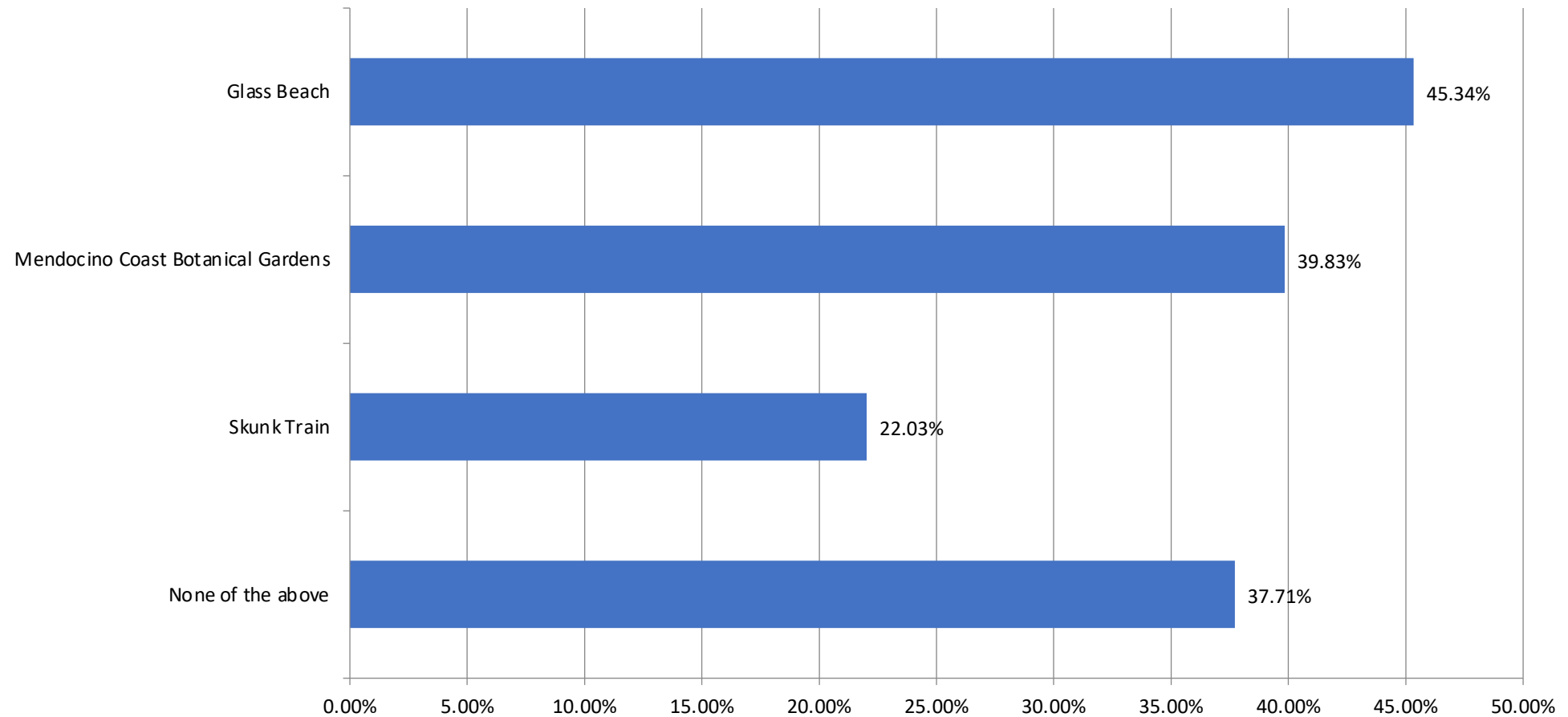


## Which of the following activities did you participate in while on that trip to the area? (Check all that apply):

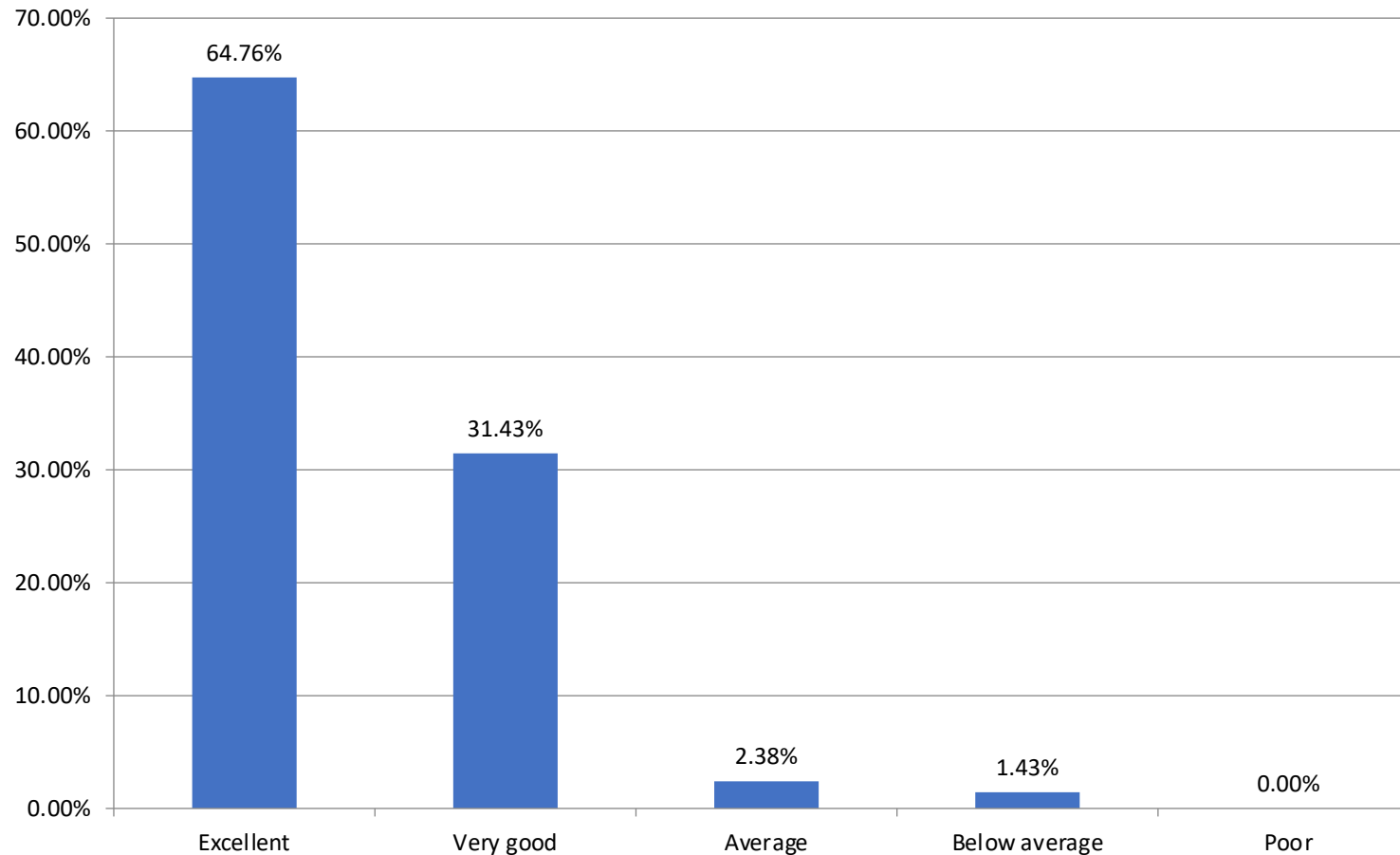




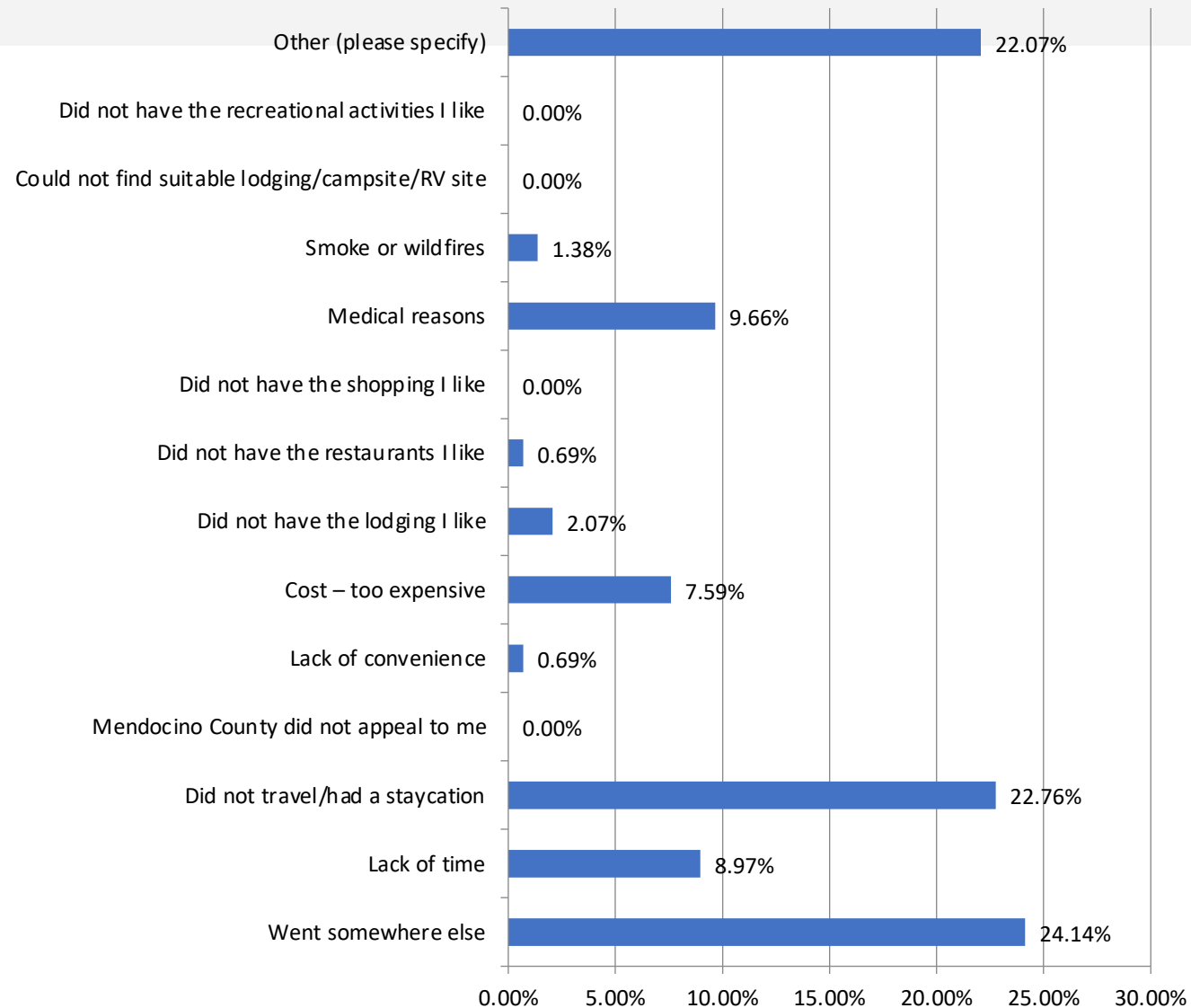
# Which of the following attractions/places in Mendocino County did you visit while on that trip to the area? (Check all that apply):



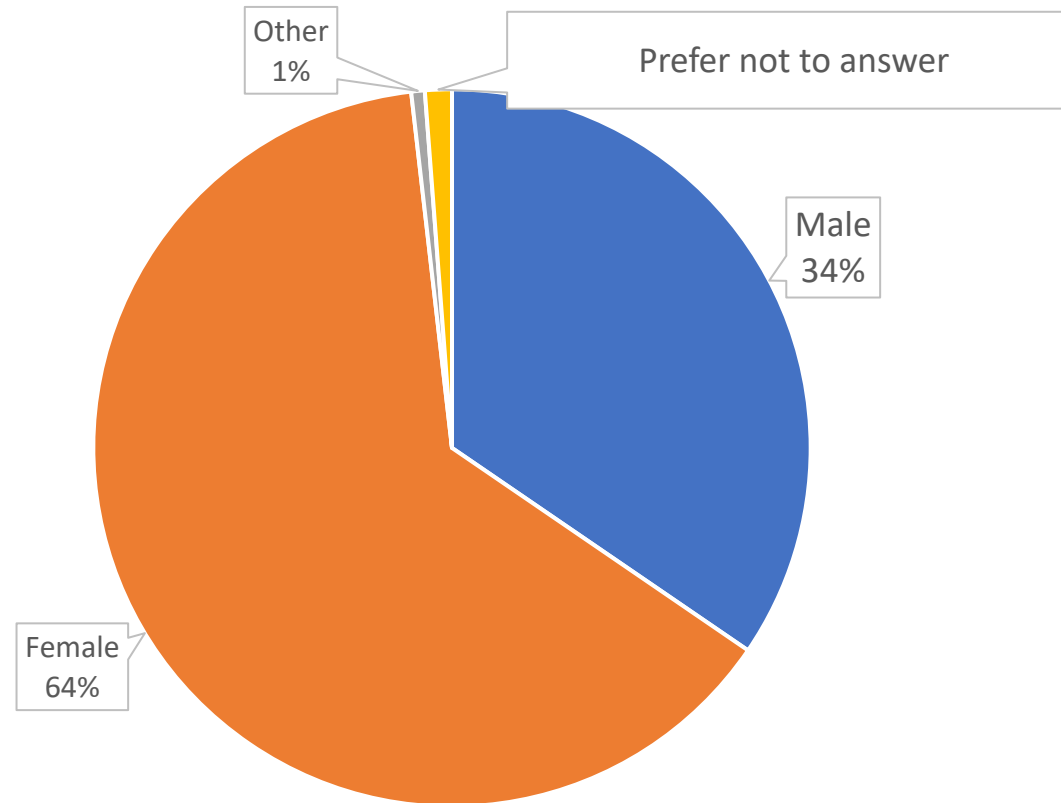
# How would you rate your overall satisfaction with your most recent day or overnight trip to the area?



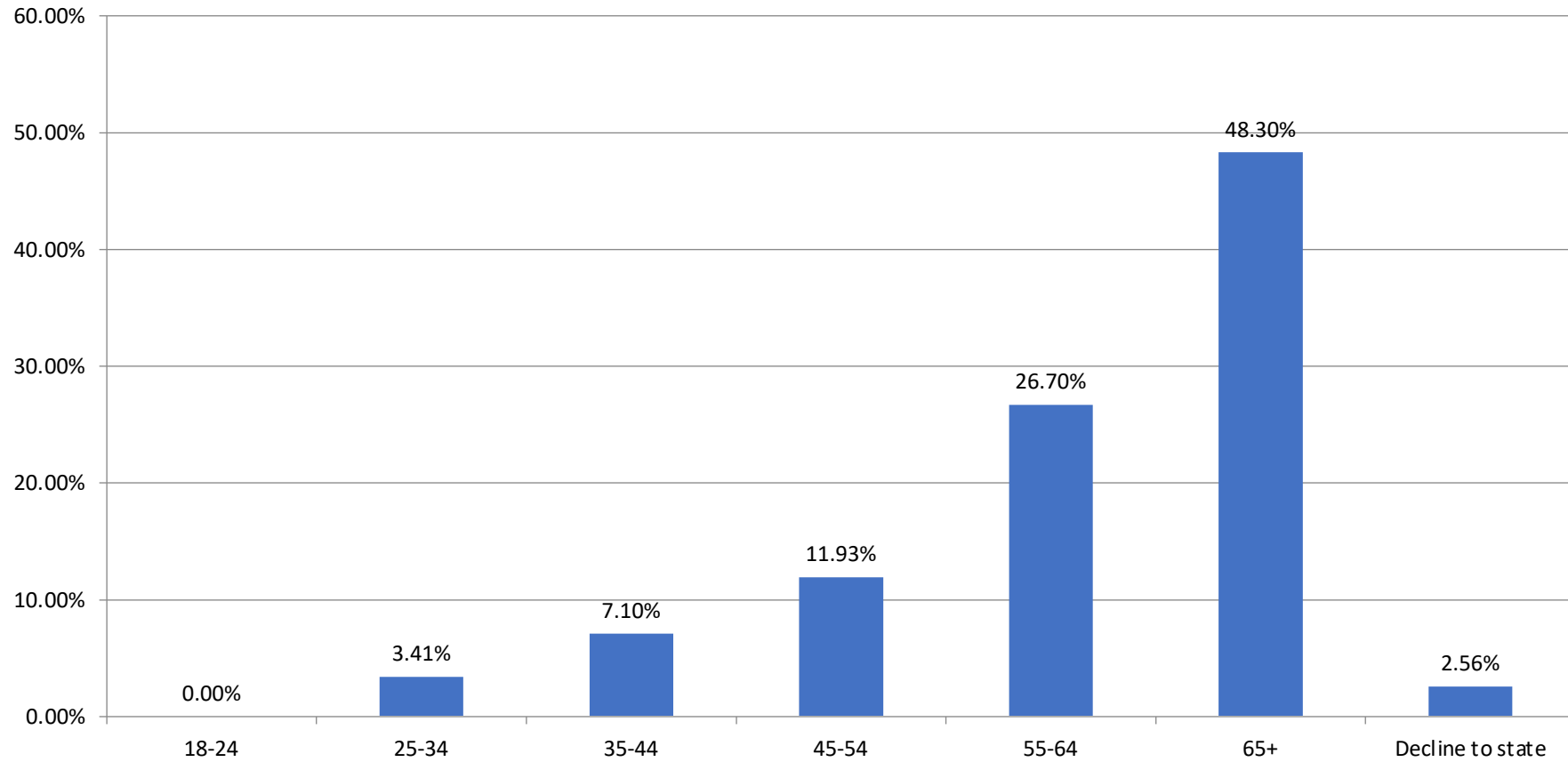
# What was the primary reason for not visiting Mendocino County this past year?



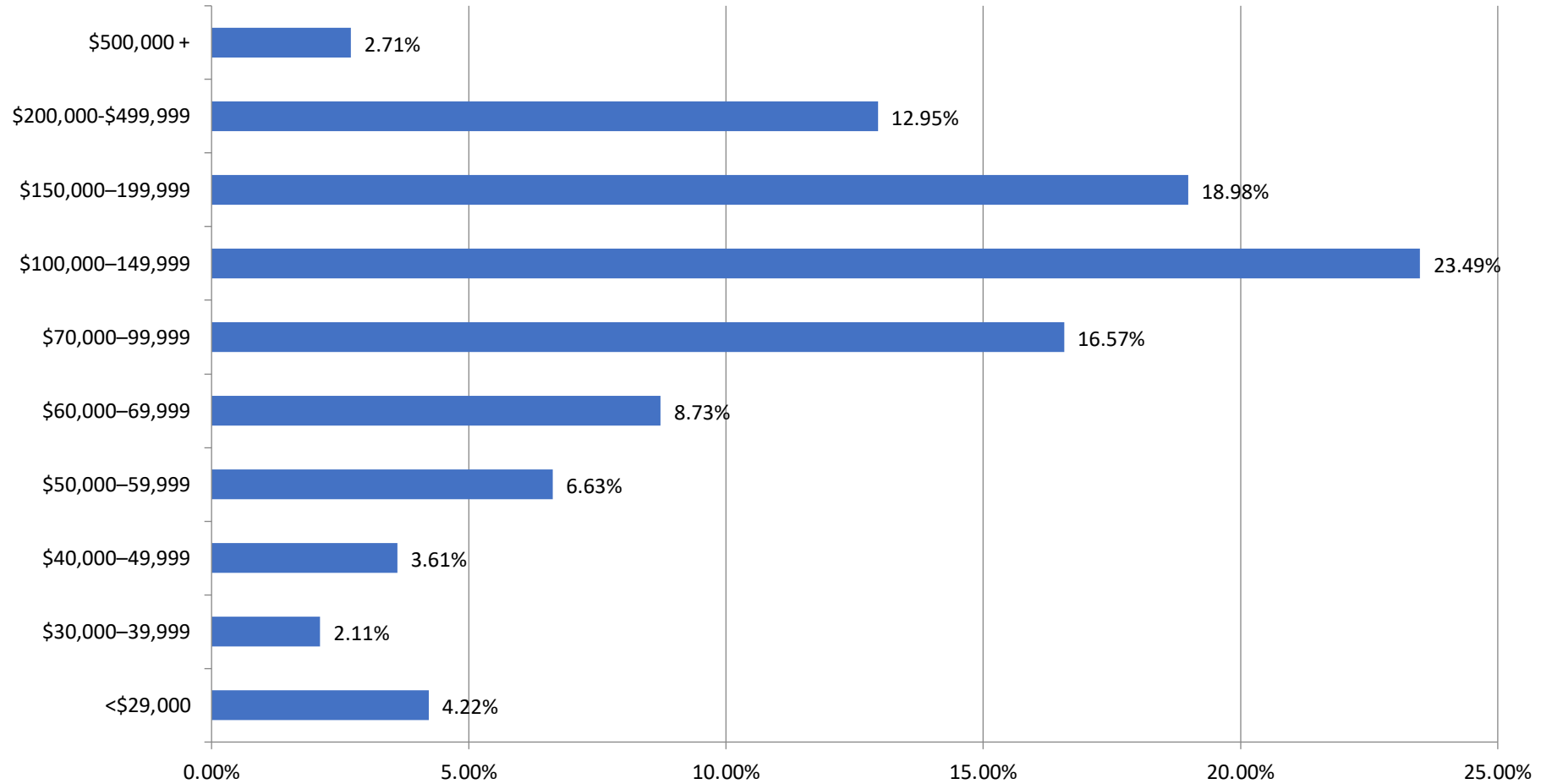
# What is your gender?



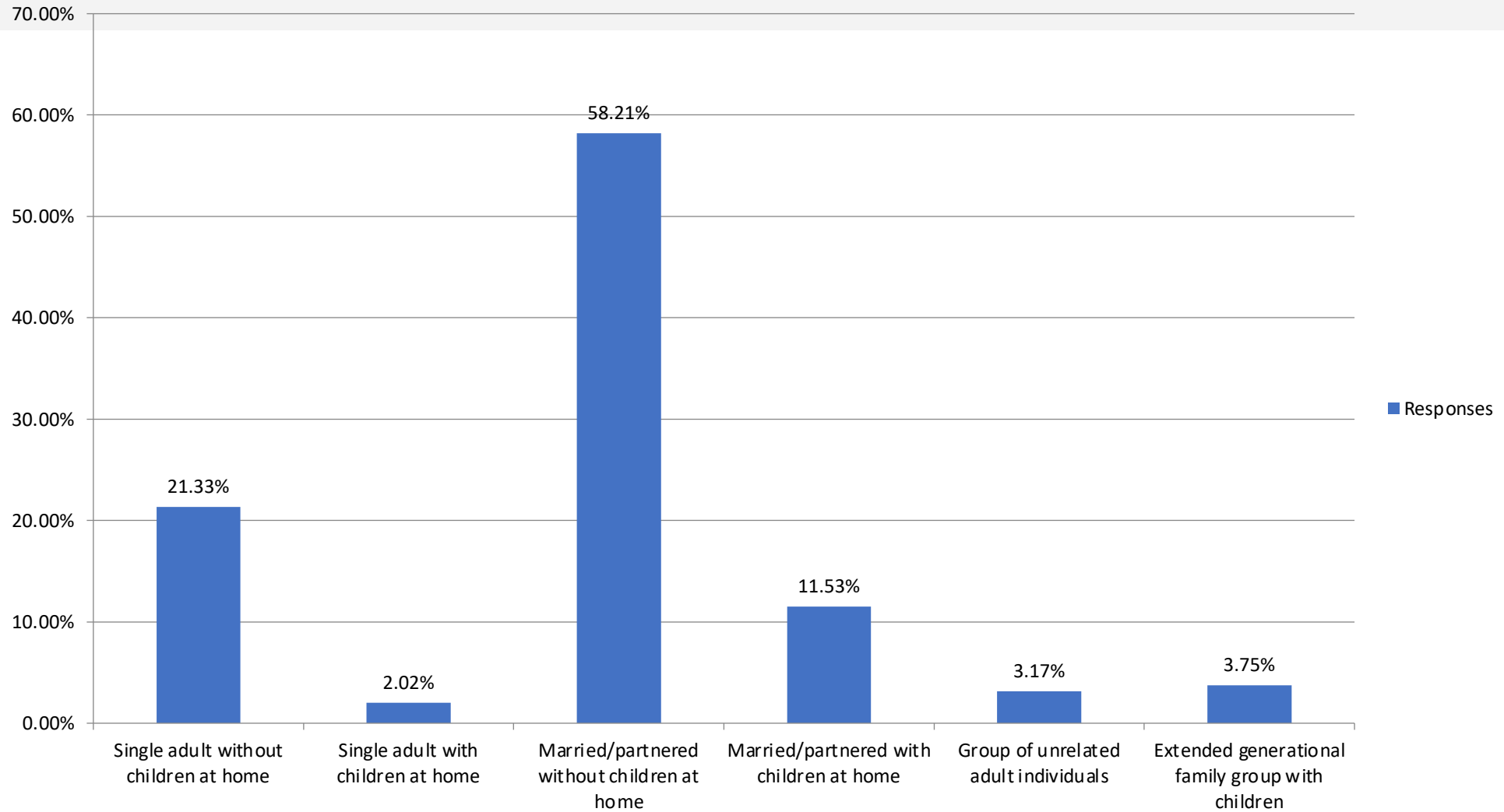
# What is your age?



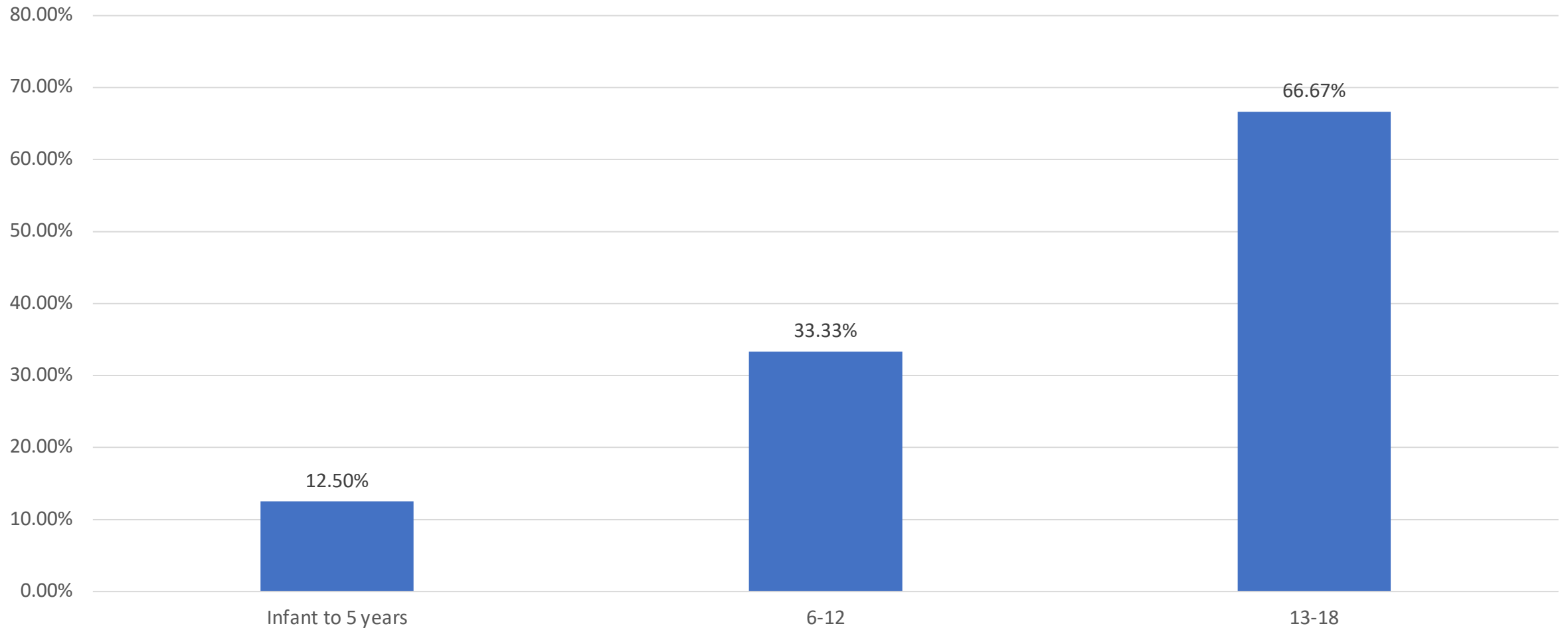
## What is your annual household income?



# Are you:

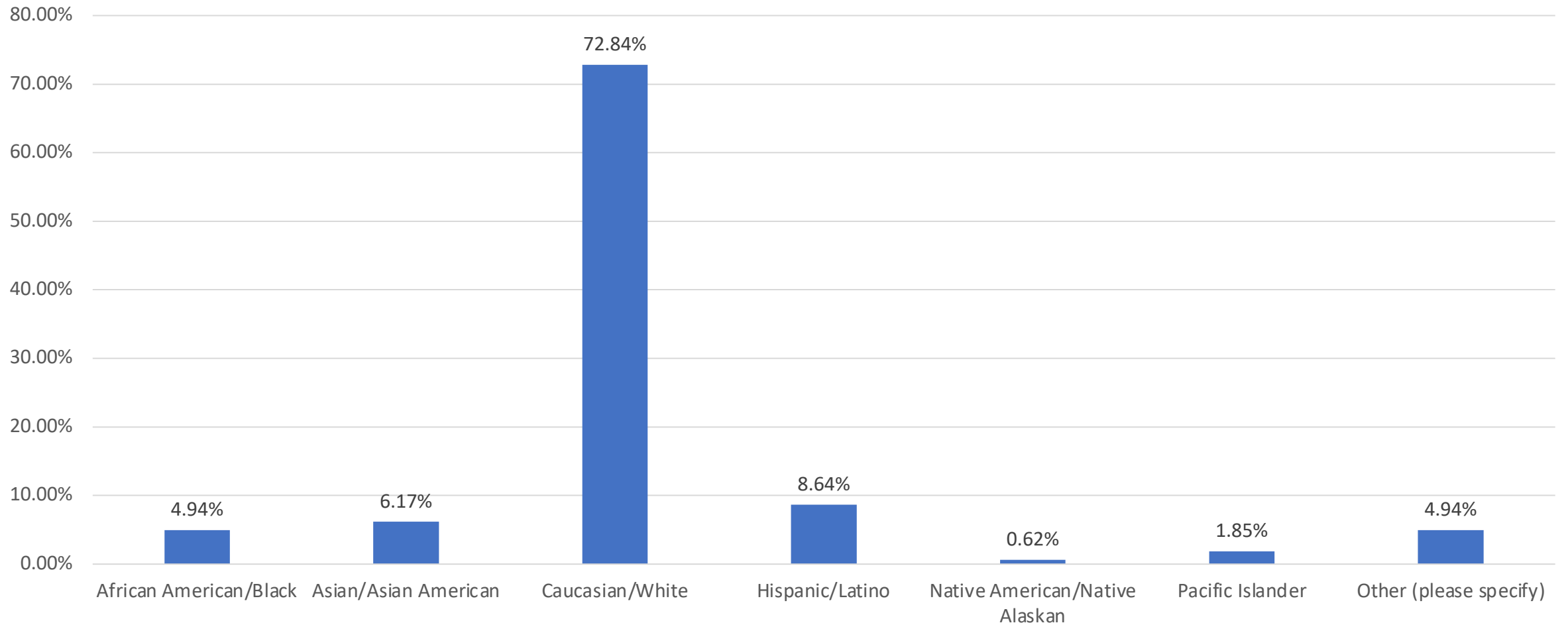


# Check if you have children living in these age groups living in your household?



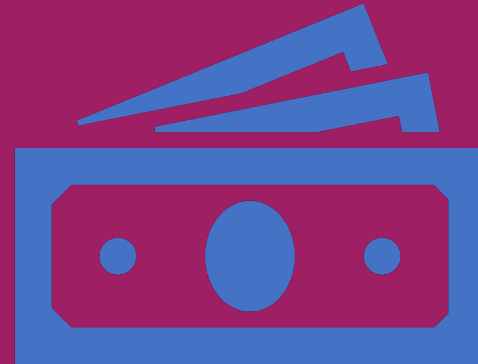


# What is your ethnicity?



# Spending and Economic Impact

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# Estimated Per Party Trip Spending

Accommodations	\$757
Food & Beverage	\$366
Entertainment	\$79
Retail Sales	\$183
Daily Transportation	\$90
(Gas/Car Rental/Bus/Taxi/Uber etc.)	
Recreation	\$96
(Admissions/Rental Equipment/ Gear/Tour Guides etc.)	
Other	\$95
Total	\$1,666

Input-Output modeling is based on the foundational concept that all industries, households, and governments in an economy are connected through buy-sell relationships; therefore, a given economic activity supports a ripple of additional economic activity throughout the economy.

IMPLAN is an I-O modeling system that uses annual, regional data to map these buy-sell relationships so users can predict how specific economic changes will impact a given regional economy or estimate the effect of past or existing economic activity.

# Visitor Spending Model Inputs

Unique Website Visitors	541,838	
Percent Bounced Visitors (76.3%)	413,422	
Remaining Unique Visitors	128,416	
Visitors % Who Visited Mendocino County (57.25%)	73,518	
Avg Number of trips/12 months (2.2)	161,739	
Visitor Percent Still Considering Destinations (41.8%)	67,607	
Percent Extremely/Very/Somewhat Influenced to Visit	48.8%	
Visit Mendocino County.com	32,992	
Visitor Spending Per Party	\$1,666	
Estimated Direct Economic Impact	\$54,965,107.06	

## Model Notes:

- It should be noted in the survey 48.8% indicated they were “Extremely/Very/Somewhat Influenced to visit Mendocino County.

# Visitor Direct Travel Spending

Spending Category		Amount
Lodging (Room Night(s) Paid):		\$24,734,298
Food and Beverage:		\$12,641,975
Entertainment:		\$2,583,360
Retail Shopping:		\$5,496,511
Daily Transportation (Gas/Car Rental/Bus/Tax. Uber etc.):		\$2,968,116
Other Recreation (lift tickets, admission fees, rental equipment or gear, tour guides):		\$3,133,011
Other:		\$3,133,011
Total:		\$54,690,281

Note: Numbers may not add up due to rounding.

# Lodging Tax Impact

- Based on a conservative estimate of lodging revenues generated at \$24 million, Transient occupancy tax collections are estimated at 10% to be \$2.4 Million.
  - \$2.4 Million represents 28% of FY 21/22 Transient Occupancy Tax Collections for Mendocino County (Mendocino County Treasurer)
  - It is also reasonable to estimate that 40% of the Transient Occupancy Tax collections occur in the unincorporated part of Mendocino County. Tax collections would be approximately \$960,000 for that area.

# Annual Tax Impacts

Category	Municipal	Special Districts	County	State	Federal	Total
Direct	\$85,000	\$242,000	\$303,000	\$1,576,000	\$4,172,000	\$6,378,000
Indirect	\$25,000	\$71,000	\$89,000	\$374,000	\$819,000	\$1,379,000
Induced	\$54,000	\$152,000	\$191,000	\$558,000	\$733,000	\$1,687,000
<b>Total</b>	<b>\$164,000</b>	<b>\$465,000</b>	<b>\$583,000</b>	<b>\$2,508,000</b>	<b>\$5,724,000</b>	<b>\$9,444,000</b>

Source: IMPLAN



# Indirect and Induced Economic Activity

Indirect (supply chain spending) = \$11.3 million

Induced (labor income spending) = \$10.5 million

Total Economic Activity = \$77 million

Source: IMPLAN

## Jobs Supported by Direct Visitor Spending

513

Jobs supported as result of indirect and induced activity

138

Total Jobs

651

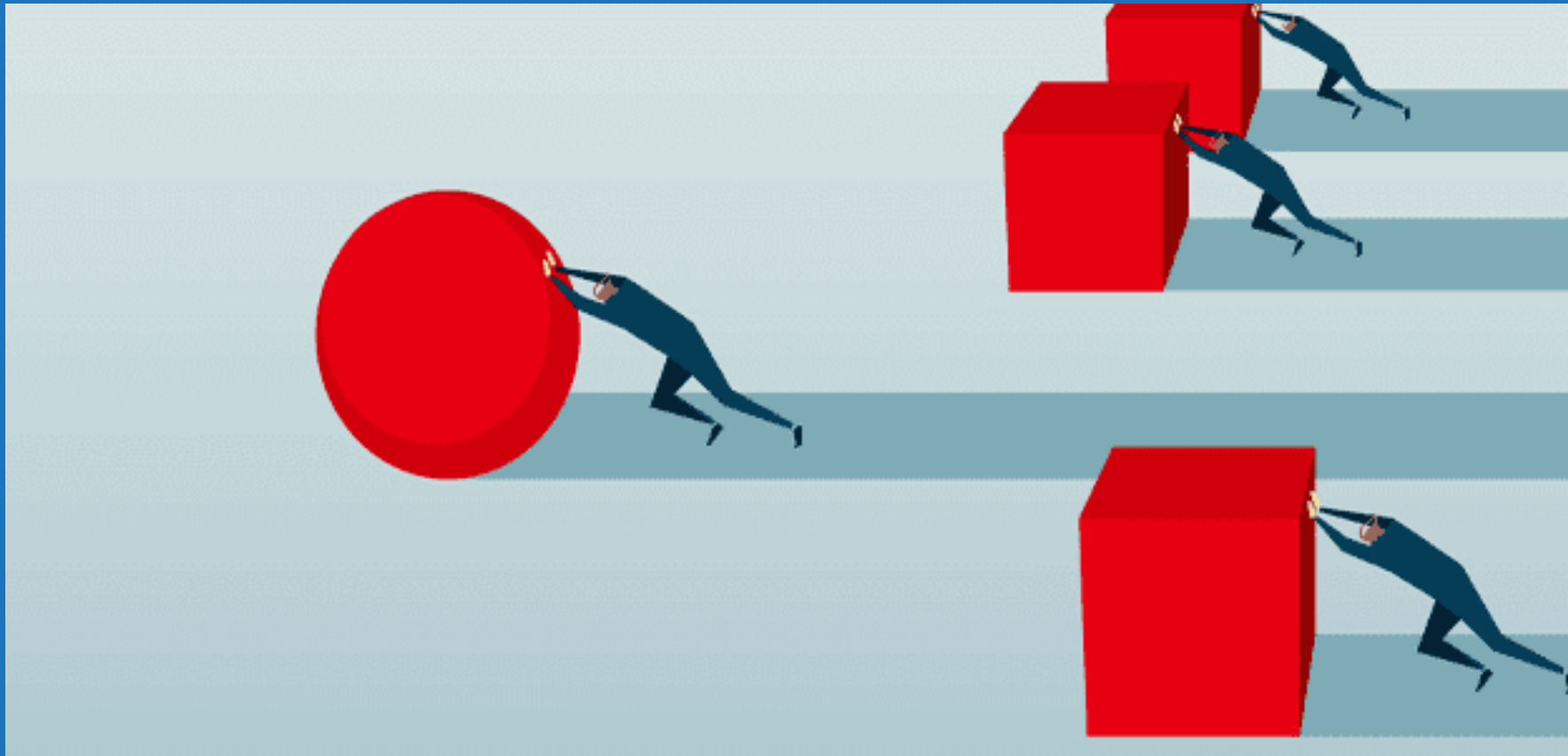
Source: IMPLAN

# Top 10 Occupations

Occupations	Jobs
Food and Beverage Serving Workers	75
Building Cleaning and Pest Control Workers	52
Cooks and Food Preparation Workers	41
Information and Record Clerks	38
Retail Sales Workers	32
Other Installation, Maintenance, and Repair Occupations	24
Other Food Preparation and Serving Related Workers	19
Supervisors of Food Preparation and Serving Workers	16
Other Personal Care and Service Workers	15
Top Executives	13

Source: IMPLAN

# Efficiency Measures



# Efficiency and ROI Measures

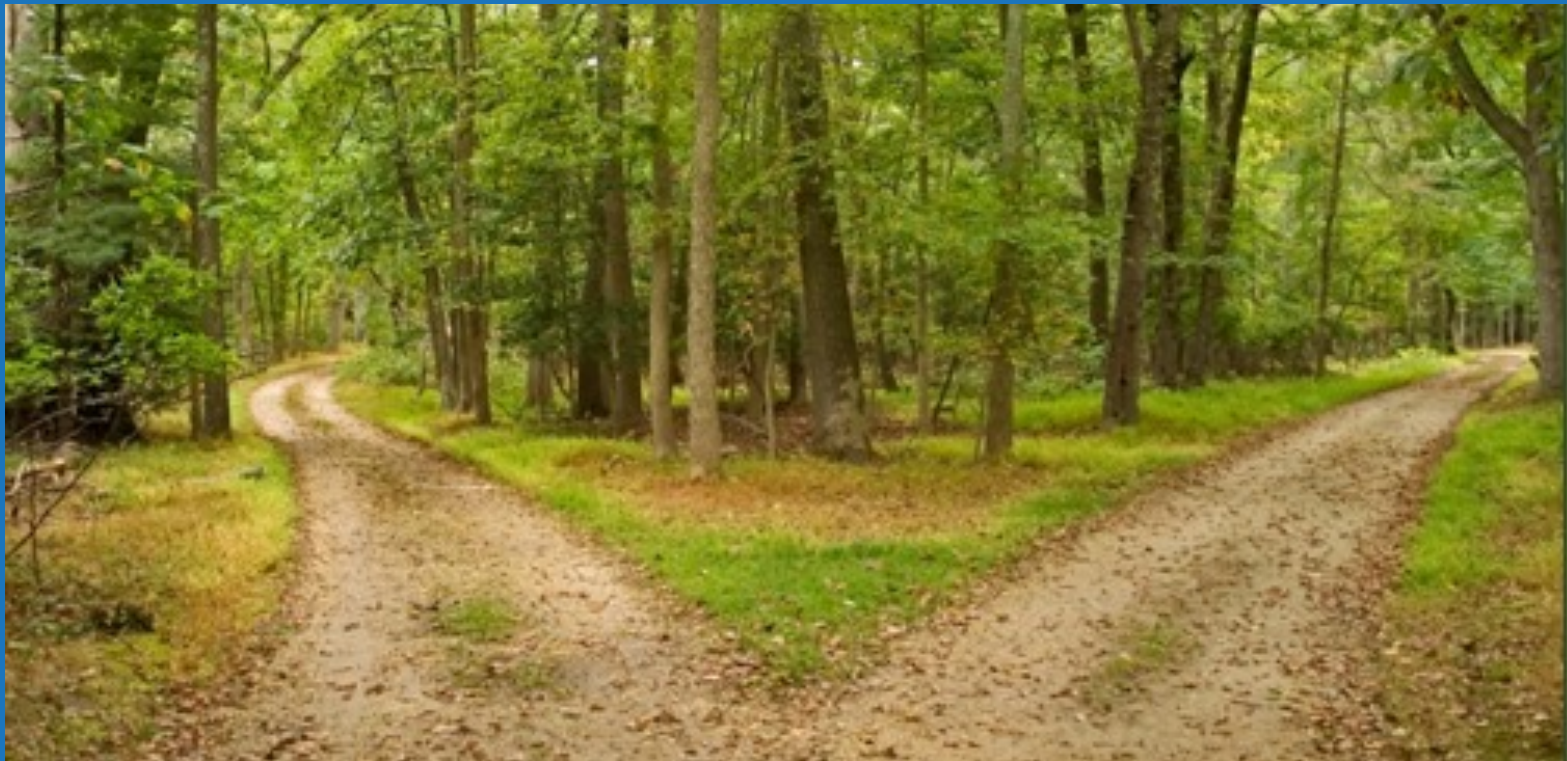
## Notes:

- Cost per Unique Visitor=Total Visit Mendocino County Total Budget \$631,417/ Unique Visitors
- Cost per Trip Party = Total Visit Mendocino County Total Budget \$631,417/visitors influenced to visit
- Program ROI= Total Economic Impact/ Visit Mendocino County budget \$631,417

	Amount
Cost per user to the website	\$1.17
Cost per trip party	\$30.33
Program ROI	\$86:\$1

# Scenario Analysis

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# Scenario Analysis

- This study, in addition to identifying the influence and economic impact Visit Mendocino has with its marketing programs, also provides management with an important tool with which to assess and revise programs for the best success of the destination.
- The analysis illustrates the relationship between the volume of users to the website, the impact of the bounce rate, travel spending and how the website influences visitors to consider the destination. The management of these variables and the ongoing improvement of them will provide improved economic impact for the destination.

# Scenario Analysis

	Baseline	Scenario 1	Scenario 2	Scenario 3	Scenario 4
Unique Website Users( Jan-Oct)	541,838	541,838	596,021	541,838	596,021
Percent Bounced Visitors (76.3%)	413,422	354,362	449,400	408,546	389,798
Remaining Unique Visitors	128,416	187,476	146,621	133,292	206,223
Visitors % Who Visited Mendocino County (57.25%)	73,518	107,330	83,941	76,310	118,063
Avg. Number of trips/12 Months (2.2)	161,739.5	236,126.0	184,669.4	167,881.5	259,738.2
Visitor Percent Still Considering Destinations (41.8%)	67,607	98,701	77,192	70,174	108,571
Percent Extremely/Very/Somewhat Influenced to Visit	49%	49%	49%	49%	49%
Visit Mendocino County.com	32,992	48,166	37,670	34,245	52,982
Visitor Spending Per Party	\$1,666	\$1,666	\$1,666	\$2,000	\$2,000
Estimated Economic Impact	\$54,965,107	\$80,244,418	\$62,757,544	\$68,490,264	\$105,964,875

## Notes:

Based on April 1,2022-Mach 31,2023 website data

Scenario 1: Includes a reduction and improvement of bounced Visitors to 65%

Scenario 2: Includes an increase of users by 10 %

Scenario 3 Includes an increase in visitor spending per party by 20%

Scenario 4: Includes scenarios 1,2 & 3



# Scenario Analysis

The goal of Visit Mendocino is to create awareness and to drive potential visitors to the website, so they have the best opportunity to be influenced to visit.

This business model approach provides Visit Mendocino with an additional management tool to improve the overall effectiveness of its efforts.