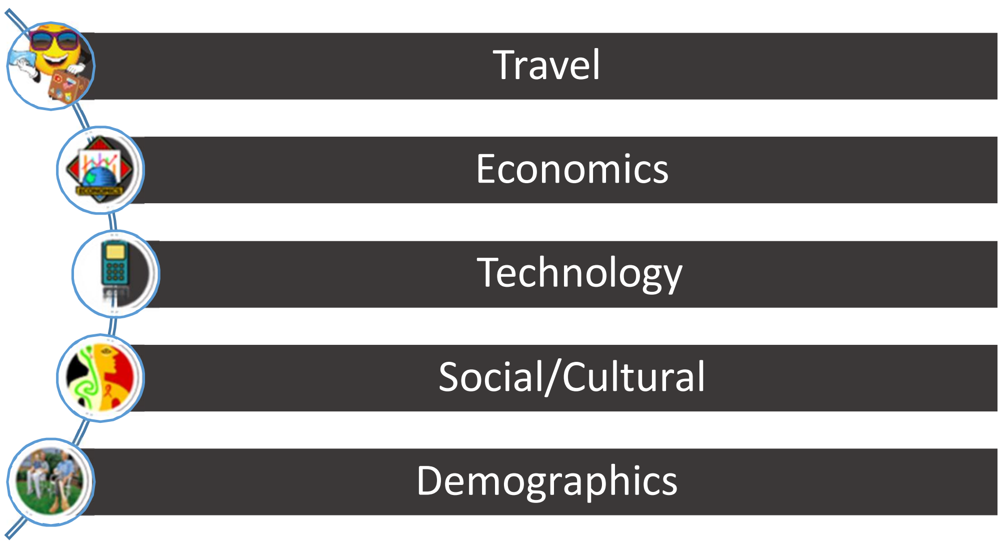
Mendocino County Situation Analysis

Part 1: Key Trends

There can be no doubt that Mendocino County, like every tourism destination, does not operate in a vacuum, but rather is subject to a variety of market influences, including **economic, travel, social, cultural and demographic trends.** As such, it is important to understand the changing environment in which the organization is operating.

Significant changes are occurring in the California marketplace that impact tourism destinations like Mendocino County, which the bureau has responded to with new programs and efforts. These shifts are primarily the result of a dramatically changed economic environment, though there are also changes in demographics, travel, socio-cultural and consumer value trends that tourism decision makers should be aware of. For the purposes of background and context, the following is a summary of the key tourism, economic and demographic trends that will help to provide a comprehensive context for the development of the Mendocino County strategic marketing direction.

Key Macro Trends Impacting Mendocino County

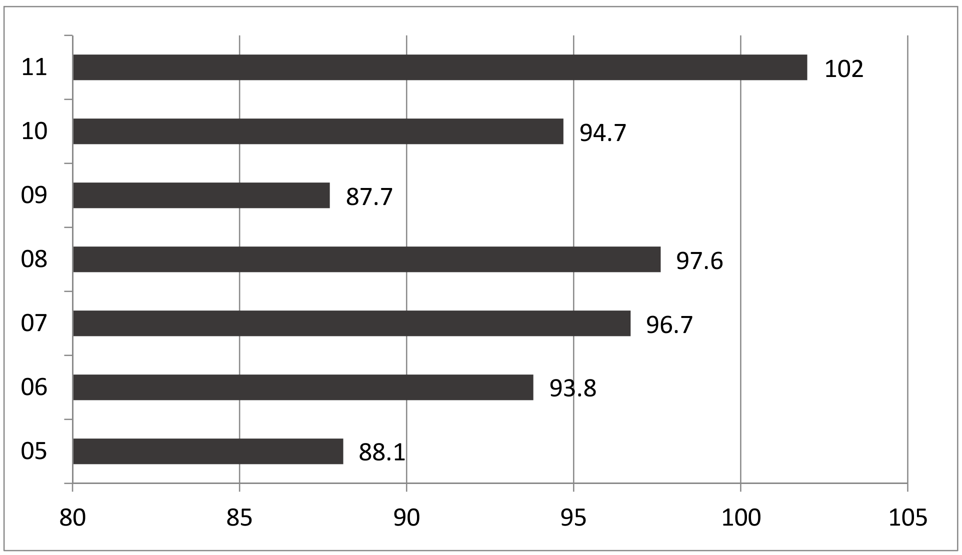


A. California Travel Trends – California Travel Spending Breaks a New Record

1. Domestic

Each year, California residents and visitors travel within the state to experience its variety of attractions, scenic beauty and local culture. According to the most recently released data by Visit California[1], **the state generated over $100 billion in direct travel spending in 2011**, a first, translating into a 5.5% increase over the preceding year**.**

Figure 2
California Travel Spending
2005-2011
($ Billions)



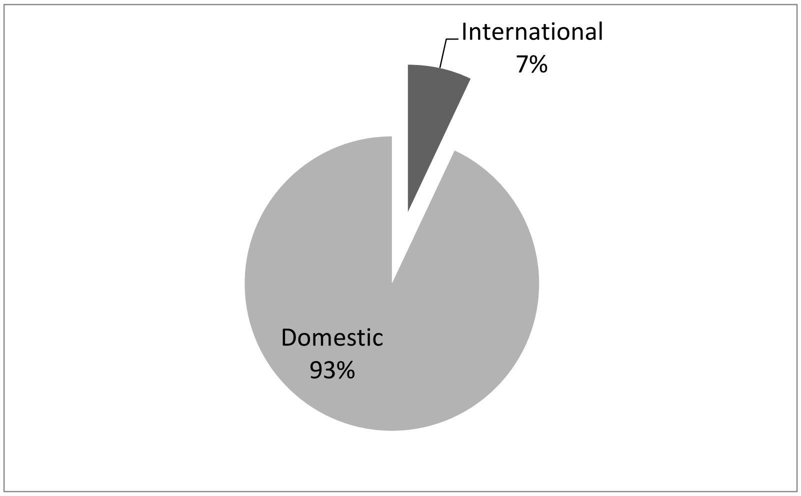
Source: Visit California

For perspective, **Mendocino County generated approximately $313m in travel spending during 2011**.

In terms of visitor volumes, Californians represent the lion's share of the state's travel and tourism industry. In 2010 (the most recent year's data available), 75% of visits and 60% of spending were from California residents[2].

[1] Visit California Economic Impact of Travel 2013
[2] Visit California Presentation, November 2011

Figure 3
2011 Total California Travel Visitors



Source: Visit California Presentation, November 2011

2. International

Attracting international markets is a primary strategy of Visit California and offers Mendocino County an opportunity. Summary trend data for international markets and the percent of those markets entering through Southern California can be found below.

Table 1
Key International Market Visitors to California

Year	Australia	UK Visitors	Canada Visitors	Italy	Germany	France	Scandinavia
2005	313,000	778,000	1,008,000	106,000	309,000	261,000	118,000
2006	286,000	752,000	1,037,000	104,000	241,000	186,000	129,000
2007	333,000	765,000	1,148,000	124,000	322,000	237,000	164,000
2008	341,000	816,000	1,257,000	151,000	393,000	302,000	157,000
2009	377,000	662,000	1,233,000	128,000	355,000	276,000	146,000
2010	502,000	682,000	1,451,000	163,000	388,888	383,000	181,000
2011	563,000	702,000	1,476,000	178,000	423,000	443,000	204,000
Annual % Change	13.3%	-1.6%	7.7%	11.3%	6.1%	11.6%	12.1%
% Visiting S.F	47%	41%	N/A	61%	66%	59%	52%

Source: Visit California

- **Australia has seen the highest annual growth rate since 2005**, followed by Scandinavia, Italy and France. It is also the number one inbound market to Los Angeles outside North America.
- **The UK is California's largest overseas market** with visitors spending approximately $731 million. Though its annual average growth has slowed since it peaked in 2008, visitation has increased.
- **Australia is California's third largest overseas market** with visitors spending approximately $589 million.
- Visitors from Canada spent approximately $1.1 billion in California in 2010.

Given Mendocino County's unique assets and proximity to San Francisco, **efforts should focus on attracting a share of international visitors which should continue to grow over time..**

B. Economic Trends – Improving

As can be seen in Table 2 below, both the U.S. and California economic pictures have changed significantly over time. Slowly recession is giving way to an improved economic picture. As can be seen below economic indicators for **both the national and state economy are showing signs of improvement.**

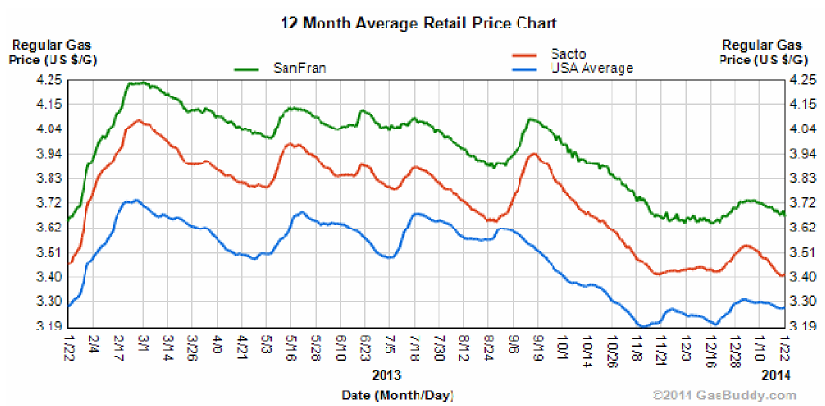
Table 2
Key California Economic Indicators

	2011	2012	2013	2014
U.S Gross Domestic Product	1.7	2.2	2.4	3.4
Unemployment CA	11.8%	10.9%	10.4%	9.5%
Unemployment U.S.	9.0	8.2	7.9	7.3
Personal Income Growth CA	6.0	4.9	3.4	5.4
Personal Income Growth U.S.	5.1	3.7	4.2	5.0
Consumer Price Index CA	2.6	2.0	2.0	2.2
Consumer Price Index US	3.2	2.1	2.0	2.1

Source: State of California, Department of Commerce

One important economic issue that has been an ongoing concern is the price of fuel **which can impact the travel decisions of price sensitive consumers.** The price of gas in the primary Northern California feeder markets is significantly higher than the U.S. average. It is not known at this time if this issue will be of short term concern or if the issue presents a longer term threat to destination travel.

Figure 4
Gas Prices



Source: Gas Buddy.com

C. Social and Cultural Trends – Consumers Keep Changing

In addition to the changing economic and demographic situation (which will be addressed in an upcoming section), several social trends are also impacting travel and tourism throughout the country, as identified by the Travel Industry Association. Below are the primary trends having the most significant strategic impact on tourism to Mendocino County.

Changing Consumer Tastes

- **Consumers as destination brand ambassadors**
  Social media + mobile technology = empowered visitors. Visitors are now brand ambassadors for destinations. Constant updates about the experience (both good and bad), along with posted photographs can make the **consumer an ever more important promoter and potential influencer of a destination.**

- **Outdoor recreation**
  According to the recently published Outdoor Recreation Economy Report, **outdoor recreation spending is approximately $646 billion in the United States and generates 6.1 million American jobs.** Of that $646 billion fully $524 billion was spent on trips and travel related spending.[3]

- **Health and wellness**
  Consumers are increasingly integrating health and wellness into their lifestyles and in so doing look for destinations that enhance those opportunities through wellness vacations and wellness travel. A **wellness vacation** is about being proactive in discovering new ways to promote a healthier, less stressful lifestyle. **Wellness Travel** is the pause that reenergizes and rejuvenates each traveler. The **wellness vacation** is considered an occasional break for the body, mind and soul.

- **Purpose driven travel**
  As consumers continually see vacation time reduced, there is a heightened need for purpose driven travel e.g. a specific special event, hiking a specific travel, surfing a specific location, etc. These trips are also driven by consumers who self- identify with a particular event or activity. For example, certain consumers may see themselves as foodies, wine aficionados, or are avid cyclists or golfers. **As such, the ability to reach and communicate with niches based on activities is increasingly important for a destination.**

- **Culinary tourism**
  Many consumers today are looking for expanded culinary experiences while on vacation. In interacting with the local food, Mendocino County visitors are dipping into the area's

[3] The Outdoor Recreation Economy Report, Outdoor Industry Association, http://www.outdoorindustry.org/images/researchfiles/OIA_OutdoorRecEconomyReport2012.pdf

agricultural history. Given that culinary tourism has become a staple in many competitor destinations there is potential opportunity to benefit from this trend by **developing innovative program that further differentiate Mendocino County.**

- **Cultural tourism**
  Cultural offerings and experiences continue to provide destination visitors with an opportunity to access the authenticity of a destination through such offerings as art, entertainment, architecture, history, events and food. Those experiences available in Mendocino County provide visitors with an excellent opportunity to understand the cultural interests of the area.

- **Environmental issues remain a priority**
  Environmental issues continue to play an important role in the selection of a destination as well as the selection of activities while on vacation. **Those destinations like Mendocino County that place a strong emphasis on the environment will have a competitive advantage over those that do not**.

- **Despite increases in travel – value still prevails**
  There can be no doubt about the shift in the marketplace towards value, and this trend continues throughout all aspects of the industry. As such it is critical for Mendocino County **to effectively communicate the value it offers.**

Marketing and Communications

- **Traveler flexibility and control – research everything**
  With the continued growth of online and mobile resources**, consumers looking for flexibility and control of their vacation decisions have the ability to research everything** and often do it not only in pre-trip planning but once a trip is underway.

- **Social media more important as travelers resist more formal marketing.**
  As consumers continue to resist traditional marketing efforts they are **relying more and more on social media to research destinations and activities**. As such Mendocino County needs to ensure it provides updated content and information to meet those needs.

- **Greater degree of personalization**
  Facilitated by increased data mining capabilities, marketing efforts will lead to much more customization for each consumer. Traditional demographic segmentation and targeting will no longer be enough as cutting edge DMOs will focus more and more on **customized targeting and offers**.

Changing Planning/Booking Trends

- **Shorter booking windows With Lots of Shopping**
  Another continuing trend that can present a challenge to the lodging industry is consumers short term booking window. As lodging properties have experienced the booking window has decreased significantly. This trend has broad implications for the tourism industry. **A shorter booking window makes it more difficult to gauge future demand and plan accordingly.**[4] Potential may exist in converting day visitors to overnight visitors with appropriate incentives. Additionally, research by the Cornell School of Hotel Administration reveals that consumers do extensive shopping, with over half looking at an average of fifteen different sites before booking[5].

- **Time poverty/hectic lives = shorter trips**
  Time continues to be the new currency due to the hectic nature of consumers' lives, and the impact is seen on vacation and travel. As has been written many times, **vacation trips have become significantly shorter in duration.** Additionally, consumers are looking for hassle-free vacations, placing greater importance on methods of booking and travel to and from destinations.

D. California Demographic Trends

Since the late 1990s, population in the state of California has increased steadily. During the period between 2008 and 2018, California population and personal income levels are projected to change significantly. During the 2003-2018 time period, the **California population is projected to grow from 34 million to 40 million**, a 13% increase. Additionally, personal income levels are projected to increase by 4.3% and average household incomes by 2.5% annually. Most important to Mendocino County are the major demographic shifts and changes in ethnicity as programs are developed.

Change will occur in several noteworthy areas including those listed below.

A. Population Shifts

California population growth between 2008 and 2018 is projected to be concentrated in three major groups:

- College age and young adults (20-34) will see an increase of just under 1 million.
- Baby boomers (age 55-74) will account for an increase of 2.5 million.
- Children (ages 0-14) will see an increase of just over 1 million.

[4] Vizergy Blog, "Google's Latest Research", http://ht.ly/auAwq
[5] Skift.com, Nov 15,2012, "Who looks at 150 sites before booking a hotel? About 5 percent of travelers, study says"http://skift.com/2012/11/15/five-percent-of-travelers-will-search-over-150-sites-before-booking-a-hotel-says-study/

Of these three segments, **clearly the shift in the baby boomer and the college age and young adult segments will have the most impact.** The growth of the children segment suggests that there will be an overall increase in the family segment.

2. Changes in Ethnicity

Another dynamic that is also changing the demographic picture is the growth of California's various race/ethnic groups. Specifically, rapid growth is occurring within the Hispanic and Asian segments. **The Hispanic segment is projected to be the single largest ethnic segment in California by 2013.**

E. Technology Trends

Technology has had a significant impact on the travel industry both from a travel planning and reservation booking perspective. Table 3 below and on the following page summarizes key technology trends and their implications.

Table 3
Technology Trends

1. Fragmentation – Digital users are everywhere, but hard to pin down exactly where

- Consumers are accessing the web through a variety of devices (mobile, tablet, desktop) and operating systems (iOS, Android, etc.)[6]
- Along with mobile app and mobile web, this makes it more challenging to identify target audience behavior.
- Multi-screen multitasking (think using a smart phone while watching TV) is no longer unusual consumer behavior.

Implication – Identifying where a target audience spends time is not as simple as it once was. Destinations need to recognize consumers as individuals…or "micro-audiences."

2. It's all about mobile

- Time spent on the mobile web is growing at 14 times the rate of desktop internet usage[7].
- Mobile internet now trumps 'regular' internet.

Implication – A mobile marketing strategy is no longer optional for destinations.

3. Content marketing is king

- Marketers are now publishers, using content to drive a variety of interactions throughout (and beyond) the AIDA (Awareness, Interest, Desire, Action) funnel.[8]Content includes paid, earned and owned content, as well as images, video and words.

Implication – It is absolutely critical to have a content marketing strategy to effectively reach passion based target segments.

4. Social-driven engagement drives preferences

- User reviews are a key influence in consumer decision making (71% of people say reviews from family members or friends influence purchase decisions)[9]. Look for continued increase and applications in use from many social marketing sources.
- Social influences consumer decisions, as users are exposed to the thoughts, opinions and recommendations of friends, families and influencers – a group of people that is growing wider through social media. [10]
- 47% of social media users engaged in customer service via these channels. [11]

[6] eMarketer, Key Digital Trends for 2013, http://www.emarketer.com/Webinar.aspx?R=4000061
[7] Ibid
[8] Ibid

[9] Harris Interactive 2010
[10] Nielsen Social Media Report 2012 http://blog.nielsen.com/nielsenwire/social/2012/
[11] Ibid

<u>Implication</u> – Online reputation management and social media monitoring are long-term critical elements for tourism.

5. Big Data isn't just jargon

- Huge amounts of data are now generated with every interaction on every digital platform. This presents a real opportunity for destinations—if harnessed effectively.

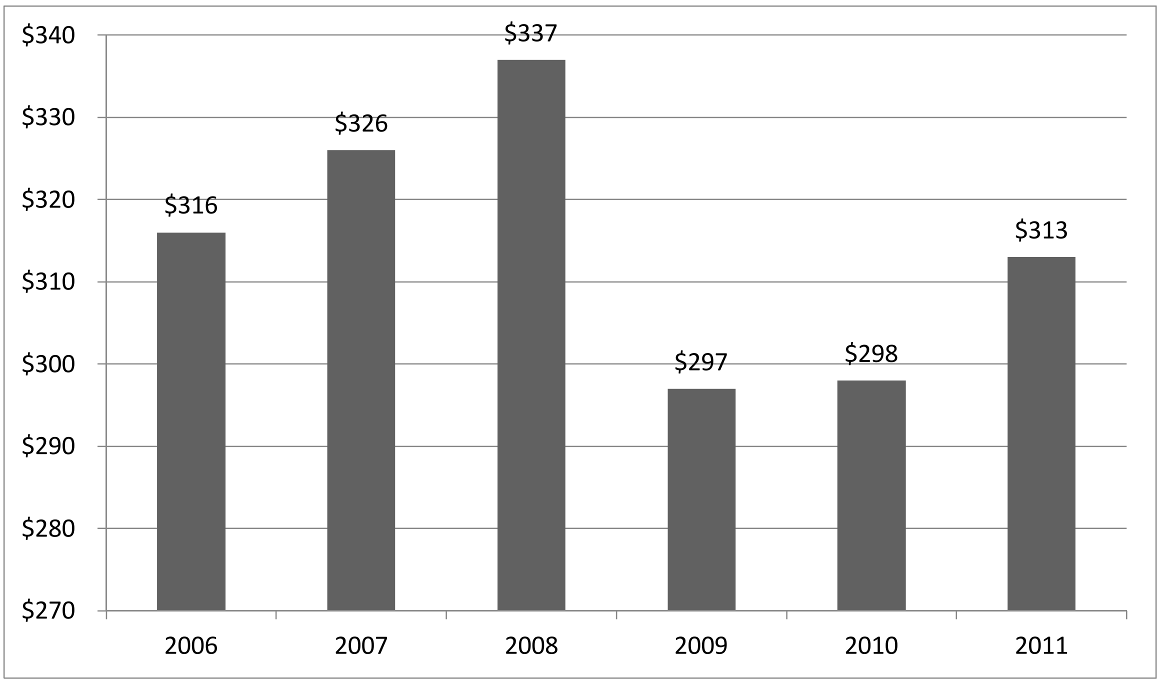
<u>Implication</u> – Destinations should seek to improve how they collect and use customer information to provide a better experience for potential visitors before, during and after their visit.

Part 2: The Mendocino County Market

A. Size and Scope of the Mendocino County Market in Perspective

Within the State of California, **Mendocino County as a whole generates approximately $46.9 million in travel spending**[12]. The 2006 through 2011 trend is found below in Figure 4.

Figure 4
Mendocino County Visitor Spending
2006-2011
($ Millions)

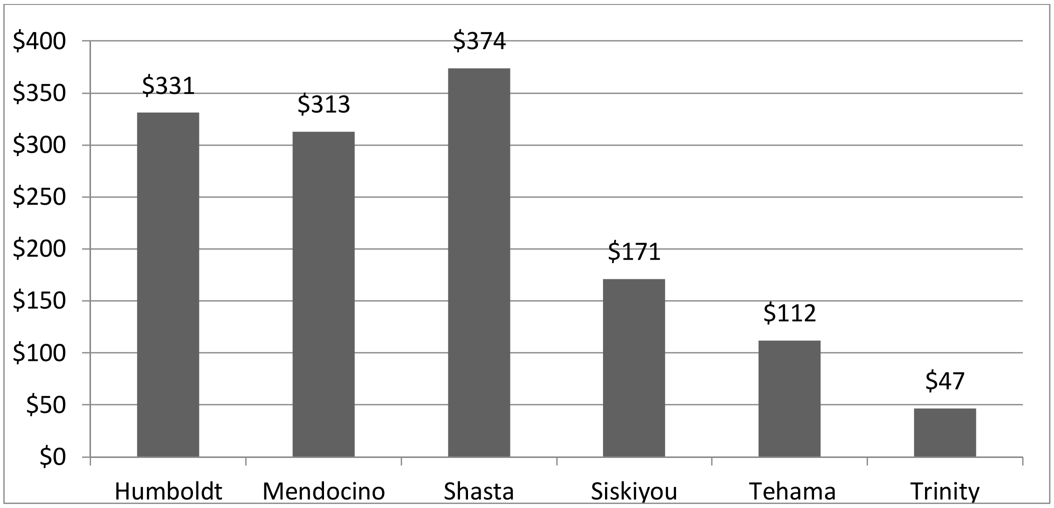


Source: California Travel Impacts by County, March 2013

In terms of overall tourism spending, as compared to neighboring counties, Mendocino and Humboldt County are ranked closely but behind Shasta County.

[12] California Travel Impacts by County 2013

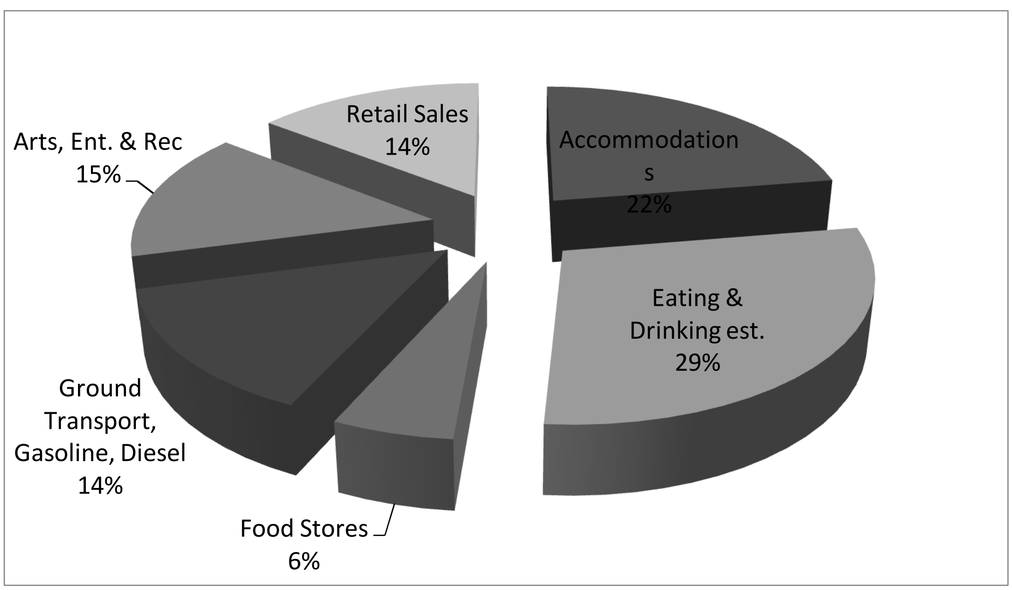
Figure 5
Travel Spending By Selected County
($ Millions)



Source: California Travel Impacts by County, 2013

With regard to how those travel dollars are spent, Figure 6 below identifies travel spending by type of business service.

Figure 6
Mendocino County Travel Spending by Type of Business Service
($ Millions)



Source: California Travel Impacts by County, 2013

Table 3 below illustrates the share of travel spending among Mendocino County and its key competitors. As can be seen travel spending share has increased for Tehama and Siskiyou County and remain constant for other County's.

Table 3
1992 vs. 2011 Regional County Travel Spending

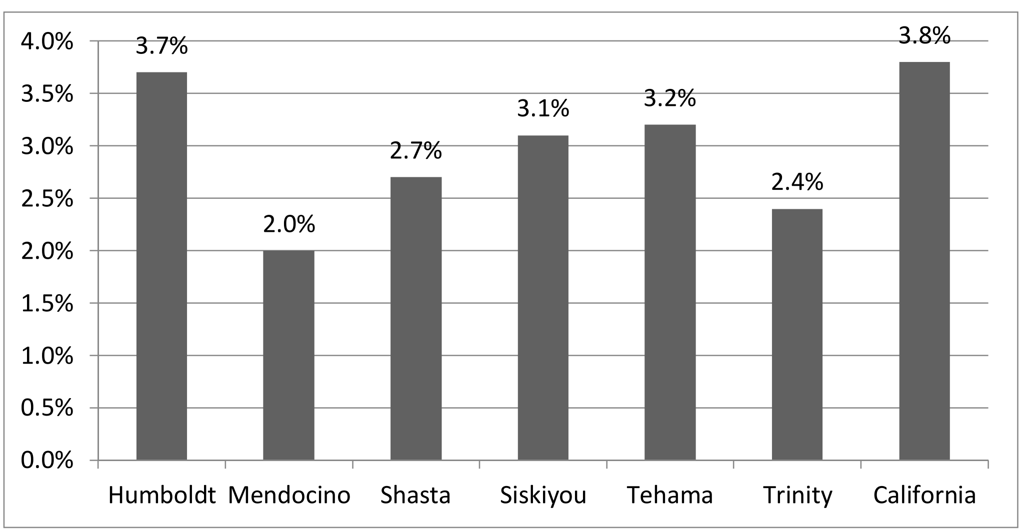
County	1992 Spending ($ Millions)	%	2011 Spending ($ Millions)	%
Humboldt	$198.0	24.48%	$331.0	24.7%
Mendocino	$197.6	24.43%	$313.0	23.3%
Shasta	$222.2	27.47%	$374.0	27.9%
Siskiyou	$96.5	11.93%	$166.0	12.4%
Tehama	$63.8	7.89%	$112.0	8.3%
Trinity	$30.7	3.80%	$46.0	3.4%
Total	***$808.8***	***100.00%***	***$1,342.0***	***100.00%***

Source: California Travel Impacts by County, March 2013

B. Travel Spending Growth Rates

Over the long-term growth during 1992-2010, **travel spending in Mendocino County averaged 2.0% annually**. This average annual growth rate was below other regional counties as well as below the state average of 3.8%.

Figure 7
1992-2010 Average Annual Travel Spending Growth Rate
by Mendocino County, Competitors & State of California[13]

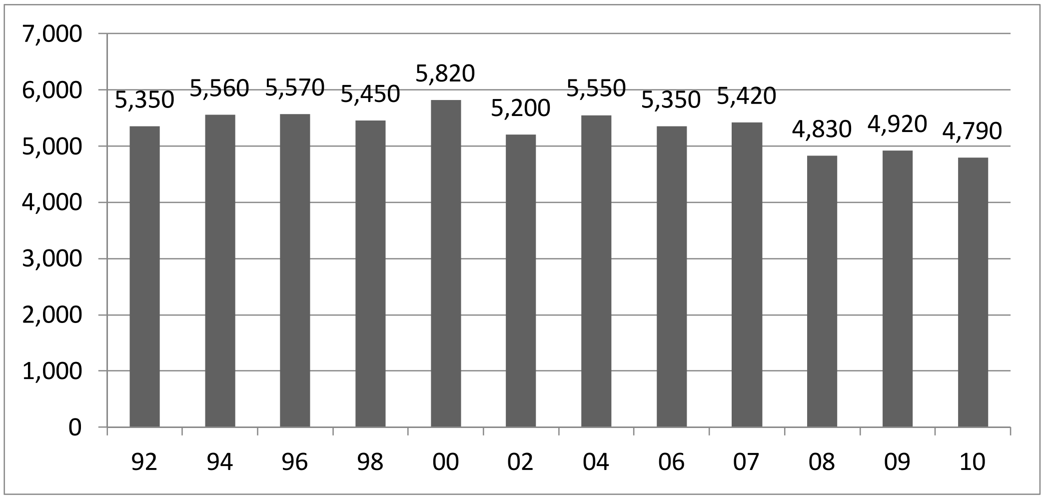


Source: California Travel Impacts by County, March 2012

[13] California Travel Impacts by County 1992-2013

In terms of employment Mendocino County has seen tourism industry employment decrease 18% from its peak in 2000.

Figure 10
Employment Created by Travel Spending



Source: California Travel Impacts by County, 2013

Part 3: Visit Mendocino

A. Visit Mendocino Marketing Activities

Visit Mendocino provide a full range of marketing activities and programs designed to create awareness and generate interest in visiting the area. Marketing programs include

- **Sales**- Visit Mendocino attends a variety of tradeshows and provides sales support. Highlights include the following:
  - Successful in booking over 1,000 room nights by groups and individuals at numerous county hotels.
  - Facilitated numerous contracts between county hotels and tour operators to bring future groups and individual travelers to the county.
  - In partnership with NCTC attended International PowWow, GoWest, and National Tour Association meeting with international and domestic tour operators.
  - In partnership with Visit California, participated in sales missions to Canada and Los Angeles.
  - Hosted a booth at consumer trade shows; Bay Area
  - Travel Show; Sunset Celebration Weekend; and Los Angeles Adventure Expo serving close to 10,000 potential visitors.

- **Advertising-** Visit Mendocino provides leadership in creating awareness for the region highlights include:
  - Nearly 45 million (11% over goal) advertising impressions from placement in print, radio, outdoor and online vehicles.
  - Reached 12,277 leads, 20% above goal.
  - Promoted the Visit Mendocino County brand and events through ads in *Sunset Magazine*, Visit California's Visitors Guide, *San Francisco Travel*'s Visitors Guide, San Francisco Bay Area outdoor billboards and radio (KGO and KCBS), online banners, and a Facebook campaign. A number of these ads were opened up to partners as co-operative opportunities.

- **Social media and website marketing activities**- Visit Mendocino provides a comprehensive media and website marketing programs. Highlights include:
  - Reached 20,000 Fans on Facebook, engagement rates continue to grow.
  - Completed content project, gathering information and photographs for more than 800 visitor-facing businesses
  - Consumer mailing list passed 25,000 subscribers.
  - Launched iPhone app in tandem with Trazzler/ OpenPlac.es, populating with more than 600 visitor facing businesses.

- **Public Relations**- visit Mendocino provides a comprehensive public relations programs including text, video and photo content. Highlights include:
  - Placed more than 100 Mendocino County stories in print, broadcast and internet media, resulting in $10 million dollars in comparable advertising value 250 million consumer impressions (200% of goal).

    - Directly recruited 50 members of the media (editors, producers, bloggers and freelancers) to visit Mendocino County and distributed 36 press releases on various topics to local, regional, national, and international press, resulting in dozens of media placements.

- **Visitor Services-** Visit Mendocino provides an active role in providing visitor information in an effort to extend visitor stays and increase visitor spending.
    - Provided funding to assist in keeping South Coast visitor center open.
    - Distributed over 100,000 county materials including tear off maps, wine maps, event calendars, pet-friendly guides, meeting guides countywide.
    - Informational kiosks established at Noyo Harbor, Fort Bragg and Solar Living Institute (Real Goods), Hopland.
    - Set up informational kiosk at County offices in Ukiah. Installed second gateway sign on Highway 20, visitor kiosk operating in Boonville.
    - Hosted inland and coastal Customer Service workshops with about 40 businesses and organizations attending from wineries, lodging, retail, finance, and transportation.
- **Special Event Support-** Special Events are a key marketing tool to increase visitation to the region. Visit Mendocino provides significant support to regional special events. Highlights include:
    - Collaborated with numerous businesses and organizations, including Mendocino Film Festival and Mendocino Music Festival, to conceptualize and promote events countywide.
    - Increased events and passport participation at both the Crab, Wine & Beer Festival and Mushroom, Wine & Beer Festival by double digit percentages.
    - Held 2nd Annual Where the Earth is First Festival and worked with olive oil producers to plan olive oil event for 2014 festival.
    - Worked with Mendocino County Museum to conceptualize the Willits Kinetic Carnivale.
    - Worked with Fort Bragg non-profit to produce Bison, Beer & Bluegrass Festival in October 2013.
    - Continued collaboration with the Mendocino County Museum on their sponsorship of the Mushroom, Wine & Beer Train.

B. Mendocino Website Analytics Review

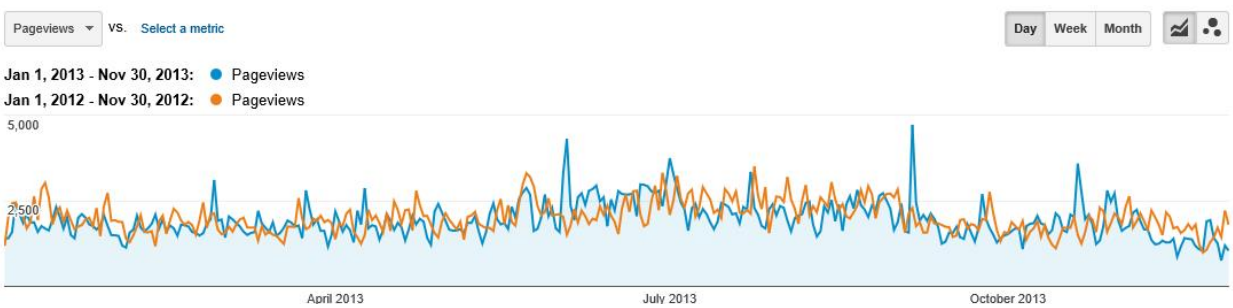
Analytics reviewed – Jan 1, 2013 – Nov 30, 2013 compared to the same dates in 2012

Observations

- YOY there was an increase in visitors (14%) and unique visits (15%)
- That said, engagement is down, including pageviews (-15%), visit duration (-12%), and pages per visit (-3%)
- Bounce rate is also up by 13%, though it's still below 50% overall

Content

While overall page views are down slightly when compared to 2012, there have been some spikes in during certain times of the year, as indicated in the below chart. Dates of interest in 2013 include February 27; April 18; June 3; September 3, and October 20. It should also be noted that page views did drop off noticeably in November, with a slight surge later in the month. Prior to that, however, they did track fairly similarly.



In terms of specific content, Mendocino saw large shifts in visitation to specific pages. For instance, visits to the home page are down 23%, along with events (-17%), specials (-37%), itineraries (-17%) and visitor guide (-12%). It is a bit concerning that these pages, which should serve as a type of call to action for potential visitors, have seen such a decline. The table on the following page illustrates the top pages visited in 2012 and 2013.

Mendocino Top pages 2013 compared to 2012

Page	Date Range	Pageviews	Unique Pageviews	Entrances	Bounce Rate	% Exit
/	Jan 1, 2013 - Nov 30, 2013	84,332	67,218	63,955	36.99%	36.47%
	Jan 1, 2012 - Nov 30, 2012	109,240	86,621	83,628	34.83%	34.60%
		-22.80%				
/festivals-events	Jan 1, 2013 - Nov 30, 2013	30,262	22,642	4,841	29.89%	16.62%
	Jan 1, 2012 - Nov 30, 2012	36,323	26,842	5,248	32.58%	16.44%
		-16.69%				
/business/glass-beach	Jan 1, 2013 - Nov 30, 2013	14,803	13,849	12,741	67.50%	79.14%
	Jan 1, 2012 - Nov 30, 2012	1,747	1,571	379	53.56%	26.56%
		747.34%				
/lodging?r=All&t=All&p=All	Jan 1, 2013 - Nov 30, 2013	14,351	9,577	499	23.45%	11.85%
	Jan 1, 2012 - Nov 30, 2012	8,583	5,502	216	22.69%	11.08%
		67.20%				
/about-mendocino/travel-tools/reques	Jan 1, 2013 - Nov 30, 2013	13,329	10,115	764	37.57%	30.86%
	Jan 1, 2012 - Nov 30, 2012	15,085	10,964	1,253	39.82%	26.15%
		-11.64%				
/about-mendocino/itineraries	Jan 1, 2013 - Nov 30, 2013	11,017	7,698	505	44.95%	17.21%
	Jan 1, 2012 - Nov 30, 2012	13,254	9,141	454	42.73%	15.84%
		-16.88%				
/31daysofgiveaways/index.htm	Jan 1, 2013 - Nov 30, 2013	10,777	7,915	7,754	68.29%	65.96%
	Jan 1, 2012 - Nov 30, 2012	0	0	-	0.00%	0.00%
		NA				
/business/orr-hot-springs-resort	Jan 1, 2013 - Nov 30, 2013	8,982	7,462	6,995	55.63%	70.43%
	Jan 1, 2012 - Nov 30, 2012	2,519	2,090	1,721	53.63%	65.22%
		256.57%				
/specials-packages	Jan 1, 2013 - Nov 30, 2013	8,934	6,993	990	42.42%	19.94%
	Jan 1, 2012 - Nov 30, 2012	14,199	10,839	1,649	38.75%	18.11%
		-37.08%				
/mushroomfestival	Jan 1, 2013 - Nov 30, 2013	6,826	3,912	2,940	42.24%	32.22%
	Jan 1, 2012 - Nov 30, 2012	0	0	-	0.00%	0.00%
		NA				
/lodging/north-coast	Jan 1, 2013 - Nov 30, 2013	6,785	4,182	1,359	24.87%	13.57%
	Jan 1, 2012 - Nov 30, 2012	5,439	3,178	284	26.06%	8.83%
		24.75%				

Cities

California drives the most visits to Mendocino's website by far. The top 10 California cities are listed below and most of them (with the exception of San Francisco and Sacramento) showing increases in 2013. It should be noted that while the numbers are up, the engagement (pages/visit) is down slightly across the board. In the same vein, bounce rates are up as well – something to continue to watch.

Mendocino Top Cities 2013 compared to 2012

City	Date Range	Visits	% New Visits	New Visits	Bounce Rate	Pages / Visit
San Francisco	Jan 1, 2013 - Nov 30, 2013	14373	75.59%	10864	44.06%	3.65
	Jan 1, 2012 - Nov 30, 2012	14586	71.82%	10476	39.97%	4.33
		-1.46%				
San Jose	Jan 1, 2013 - Nov 30, 2013	6951	71.28%	4955	43.85%	3.99
	Jan 1, 2012 - Nov 30, 2012	5172	73.69%	3811	37.82%	4.52
		34.40%				
Fort Bragg	Jan 1, 2013 - Nov 30, 2013	4794	52.65%	2524	47.68%	3.58
	Jan 1, 2012 - Nov 30, 2012	4415	45.98%	2030	50.87%	3.22
		8.58%				
Ukiah	Jan 1, 2013 - Nov 30, 2013	4316	53.24%	2298	47.57%	3.84
	Jan 1, 2012 - Nov 30, 2012	3422	53.80%	1841	44.33%	4.04
		26.13%				
Los Angeles	Jan 1, 2013 - Nov 30, 2013	4310	78.91%	3401	53.78%	3.32
	Jan 1, 2012 - Nov 30, 2012	2543	80.61%	2050	41.64%	4.20
		69.48%				
Sacramento	Jan 1, 2013 - Nov 30, 2013	4166	76.98%	3207	40.16%	4.37
	Jan 1, 2012 - Nov 30, 2012	4449	78.49%	3492	32.57%	5.19
		-6.36%				
Oakland	Jan 1, 2013 - Nov 30, 2013	3727	74.40%	2773	42.85%	3.88
	Jan 1, 2012 - Nov 30, 2012	2858	73.97%	2114	34.04%	5.05
		30.41%				
Santa Rosa	Jan 1, 2013 - Nov 30, 2013	2892	71.20%	2059	44.99%	3.78
	Jan 1, 2012 - Nov 30, 2012	2026	71.17%	1442	41.76%	4.01
		42.74%				
Berkeley	Jan 1, 2013 - Nov 30, 2013	2081	74.34%	1547	42.82%	3.89
	Jan 1, 2012 - Nov 30, 2012	1982	73.51%	1457	38.14%	4.48
		4.99%				
San Diego	Jan 1, 2013 - Nov 30, 2013	1608	69.90%	1124	48.32%	3.27
	Jan 1, 2012 - Nov 30, 2012	1302	78.88%	1027	41.86%	4.30
		23.50%				
Sunnyvale	Jan 1, 2013 - Nov 30, 2013	1445	75.64%	1093	41.73%	4.09
Sunnyvale	Jan 1, 2012 - Nov 30, 2012	1293	77.88%	1007	36.04%	4.72
		11.75%				
San Rafael	Jan 1, 2013 - Nov 30, 2013	1358	72.16%	980	42.42%	4.22
San Rafael	Jan 1, 2012 - Nov 30, 2012	954	74.74%	713	36.27%	4.60
		42.35%				