Mendocino County

Out of Market Survey

STRATEGIC MARKETING GROUP

SMG

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Project Overview

In an effort to determine behavior, motivations and perceptions of travelers within the Northern California/Nevada region, Visit Mendocino contracted with the Strategic Marketing Group (SMG) to conduct the 2014 Mendocino County out of Market Survey.

Project Objectives:

- **To understand travel motivations and behavior** of visitors who live and travel within the Northern California/Nevada region.
- **To understand differences by specific regions of residence and destinations** within the Northern California/Nevada region.
- **To determine Net Promoter Scores,** a metric for evaluating how likely visitors are to recommend Northern California/Nevada destinations.
- **To evaluate** future visits, including overall likelihood of travel to the region and the likelihood of travel to specific destinations.
- **Develop recommendations** that work to effectively position Mendocino County to its target markets.

Methodology:

SMG launched the intercept survey in March 2014 using a panel survey. The sample of 875 respondents, included

- 28% from the San Francisco Bay Area (N=241)
- 30% from the California Central Valley (N=260)
- 4% from the California Central Coast (N=33)
- 13% from other rural California destinations (N=111)
- 10% from Nevada (N=86)
- 6% from Oregon (N=144)

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

Executive Summary

Part 1: Visitor Residence and Destinations

- This report provides survey findings based on analysis of the overall sample, respondent areas of residence, and by the destination most recently visited.
- Residence regions include the California Central Valley (30%), the California Bay Area (28%), Oregon (16%), rural California (13%), Nevada (10%) and the California Central Coast (4%).
- Destinations most recently visited include 26 individual Northern California and Nevada destinations, with Mendocino/Ft. Bragg representing 2% (N=15) of the entire sample.
- ***Study Insight:* Providing results by respondent residence and destination allows a better understanding of travel behavior varies by geography within Northern California and surrounding states.**

Part 2: Visitor Motivations

- "Just to get away" was the most commonly-cited reason for overnight leisure trips, with 29% of the sample; yet the remaining 71% of respondents selected a variety of reasons, with no single reason accounting for more than 3% of the sample, and with large variances by respondent destination.
- Scenic beauty and natural attractions" received the highest importance rating from a list of 16 attributes
- ***Study Insight: "*Setting/natural environment" and "scenic beauty and natural attractions were popular among all respondents, but were significantly more important to those who visited Mendocino/Ft. Bragg.**

- In general, respondents were significantly more likely to remember advertisements for the destinations they had visited.
- However, this increase did not apply to Mendocino/Ft. Bragg visitors, who were only slightly more likely to recall Mendocino/Ft. Bragg advertising (7%) compared with respondents overall (5%).
- ***Study Insight:* Investigate how Mendocino/Ft. Bragg advertising varies from competitor destinations.**

Part 3: Visitor Behavior

- Respondents reported a higher number of overnight leisure trips within Northern California and Nevada (3.9) than out of these markets (3).
- However, they spent significantly more on leisure trips outside of Northern California and Nevada ($1,140) than those within ($641).
- ***Study Insight:* Regional residents likely have shorter, less expensive, but more frequent trips to Northern California and Nevada.**

- The internet is a valuable tool for most visitors for planning and purchasing their overnight leisure trip, making lodging reservations, and for accessing information about destinations during their visit.
- ***Study Insight:* 79% of respondents would look for information online when visiting a destination, compared with only 12% who would go to a visitor information center and only 9% who would ask a local resident for advice.**

- Average stays and season visited varied significantly by both respondent residence and destination.
- ***Study Insight:* Mendocino/Ft. Bragg visitors had much higher rates of summer and spring visitation than most other destinations.**

Part 4: Future Travel and Visitor Loyalty

- Most respondents (64%) felt the number of overnight leisure trips within Northern California and Nevada would increase over the next year.
- Oregon respondents were the exception, with more assuming a decrease. This can likely be attributed to the longer distance to travel to Northern California/Nevada destinations from Oregon.
- The most popular individual destinations for future travel included San Francisco (39%), Las Vegas (31%), Monterey/Carmel/Big Sur (26%) and Yosemite (23%).

- ***Study Insight:* Overall, respondents were much more likely to select the destinations they had visited on their most recent overnight trip, indicating a high rate of repeat visitors.**

This was particularly true for Mendocino/Ft. Bragg, where 60% of those who had visited were likely to visit in the future, compared with 11% among the sample overall.

- The survey asked respondents to indicate how likely they would be to recommend the Northern California/Nevada destination they had most recently visited to a friend or family member.
- This is called a net promoter score, and it indicates the respondent's loyalty to a specific destination.
- By destination visited, Yosemite had the highest net promoter score (9.63 out of 10), followed by North Lake Tahoe (9.14), and Monterey/Carmel/Big Sur (9.10).

- ***Study Insight:*** **Mendocino/Ft. Bragg had the fourth highest net promoter score of all destinations, with 9.07 out of 10.**

Part 5: Visitor Profile

In order to get a better understanding of visitors, respondents provided detail on their media habits and activities/hobbies; rated their agreement with several statements about travel preferences; and demographic information.

- Television is the most popular media activity, selected by 78% of respondents; closely followed by daily online surfing, with 76% of respondents.

- When asked which activities they enjoy, half of respondents or more selected "enjoying the good life" (57%); "home life" (52%); "sports, fitness & health" (52%); "hobbies/interests" (51%); and "the great outdoors" (50%).

- Compared with visitors to other destinations, those who visited Mendocino/Ft. Bragg were especially likely to prefer locally-owned shops and restaurants on vacation, vacation by themselves or with their significant other rather than family or friends, to visit destinations with a special event that appeals to them and enjoy fine dining (as opposed to casual dining).

- ***Study Insight:*** **Data on activities and preferences provided in this report offers guidance for launching marketing, advertising and public relations campaigns in specific markets.**

Part 1: Visitor Residence and Destinations

Participants were categorized by the Destination Marketing Area (DMA) where they reside, as well as the destinations where they had taken an overnight leisure trip in the past year—specifically, the destination they had most recently visited.

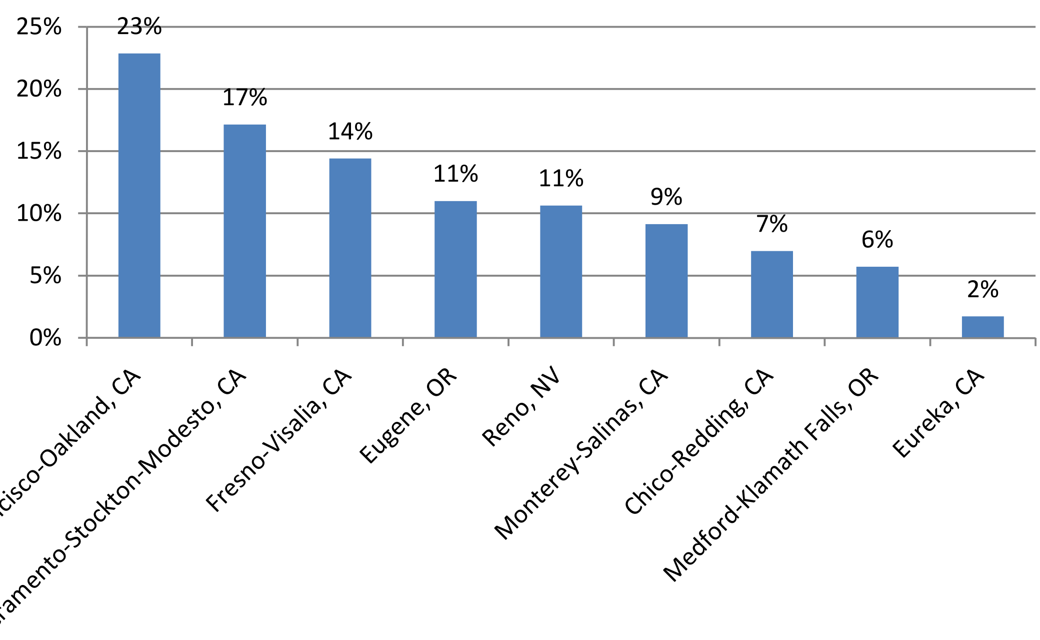
These categories are used throughout this report to demonstrate similarities and differences among respondents from various locations and visitors of various destinations.

A. Respondent Residence

Respondent Residence by Destination Market Area (DMA)

- The sample included respondents from throughout Northern California, Northern Nevada and Oregon.
- The most common DMAs of residence included San Francisco-Oakland (23%) and Stockton-Modesto (17%), while Eureka, CA was least common (2%).
- Other DMAs had similar sample sizes, ranging between 6% and 11% of respondents. See Figure 1.

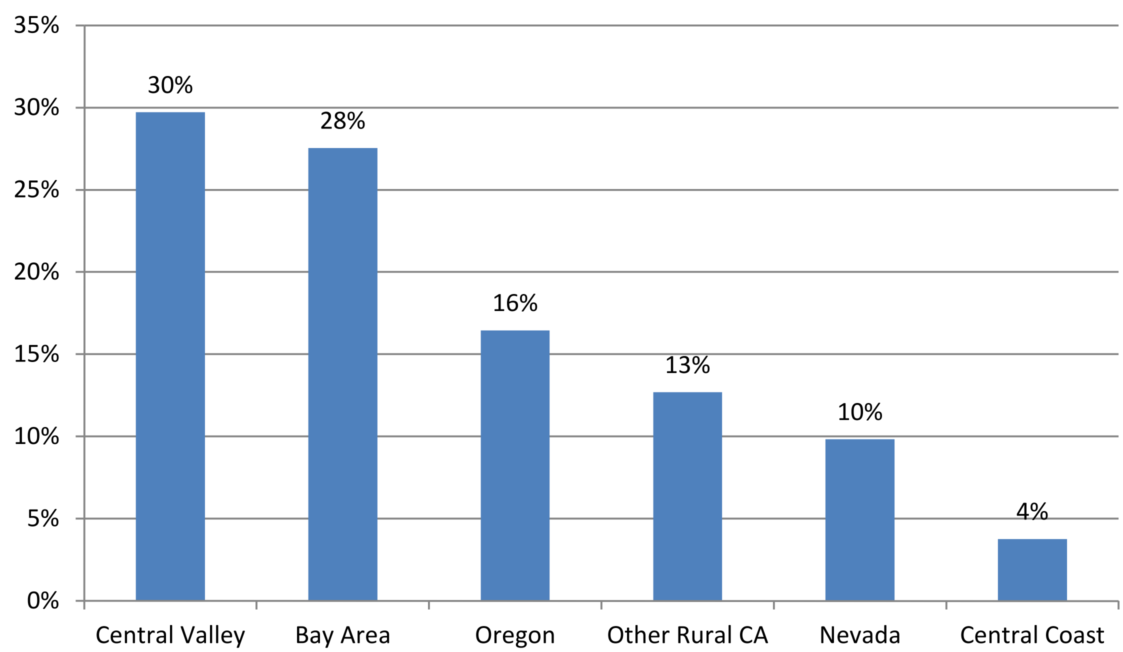
Figure 1
Respondent DMA (in %)
(Base = All Respondents)



Respondent Residence by Region

- Respondents were further identified by the overall region where they live.
- Overall, 30% of respondents were from the Central Valley and 28% were from the Bay Area.
- Fewer respondents were from other areas in California, with just 4% from the Central Coast and 13% from other rural California areas.
    - For the purposes of this report, the small number of respondents (N=33) from the California Central Coast indicates that responses from this region should be viewed in a qualitative frame of reference.
- 16% of respondents were from Oregon, and 10% were from Nevada.

Figure 2
Respondent DMA (in %)
(Base = All Respondents)

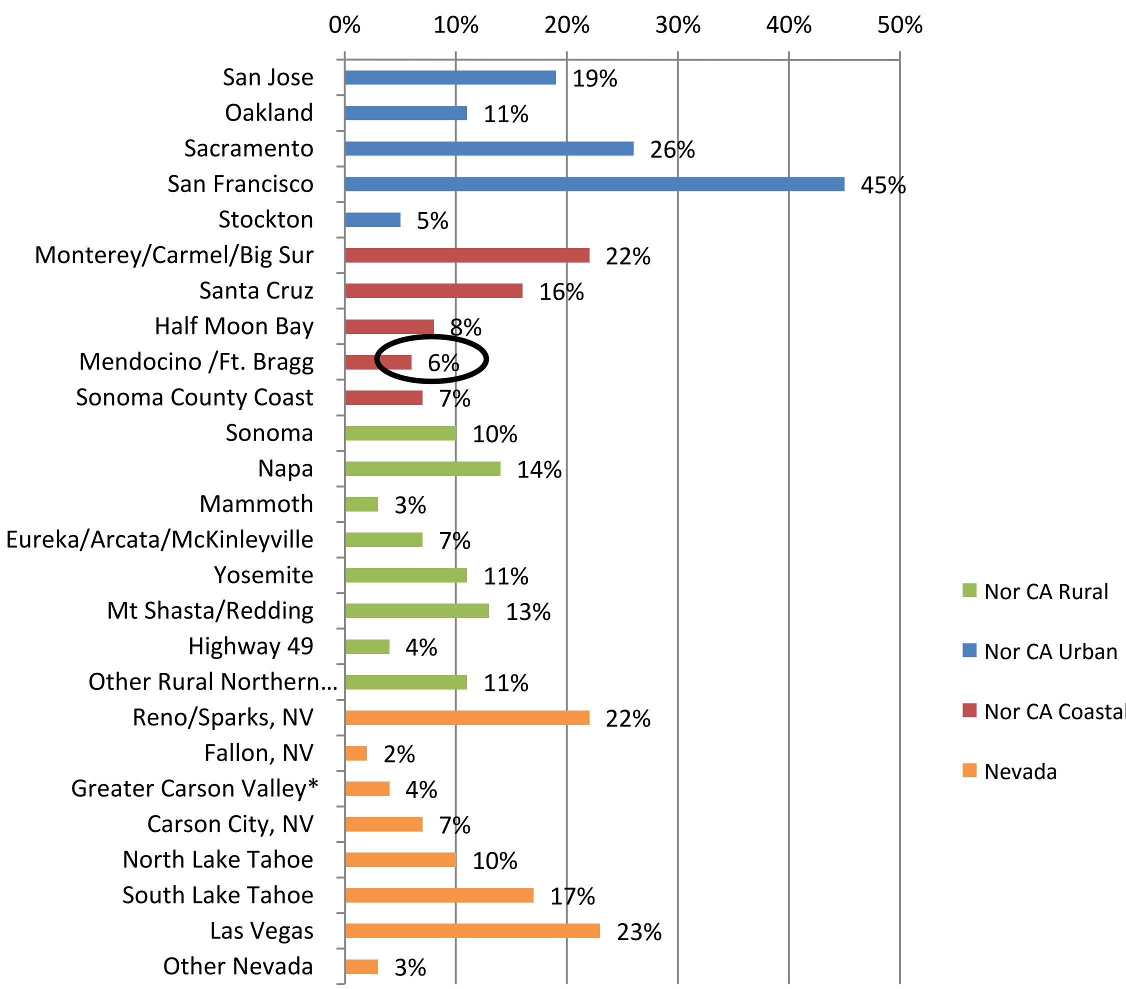


B. Respondent Destinations

All Destinations Visited in Past 12 Months

- Respondents indicated each Northern California and Nevada destination where they had taken an overnight leisure trip within the past 12 months.
- 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.

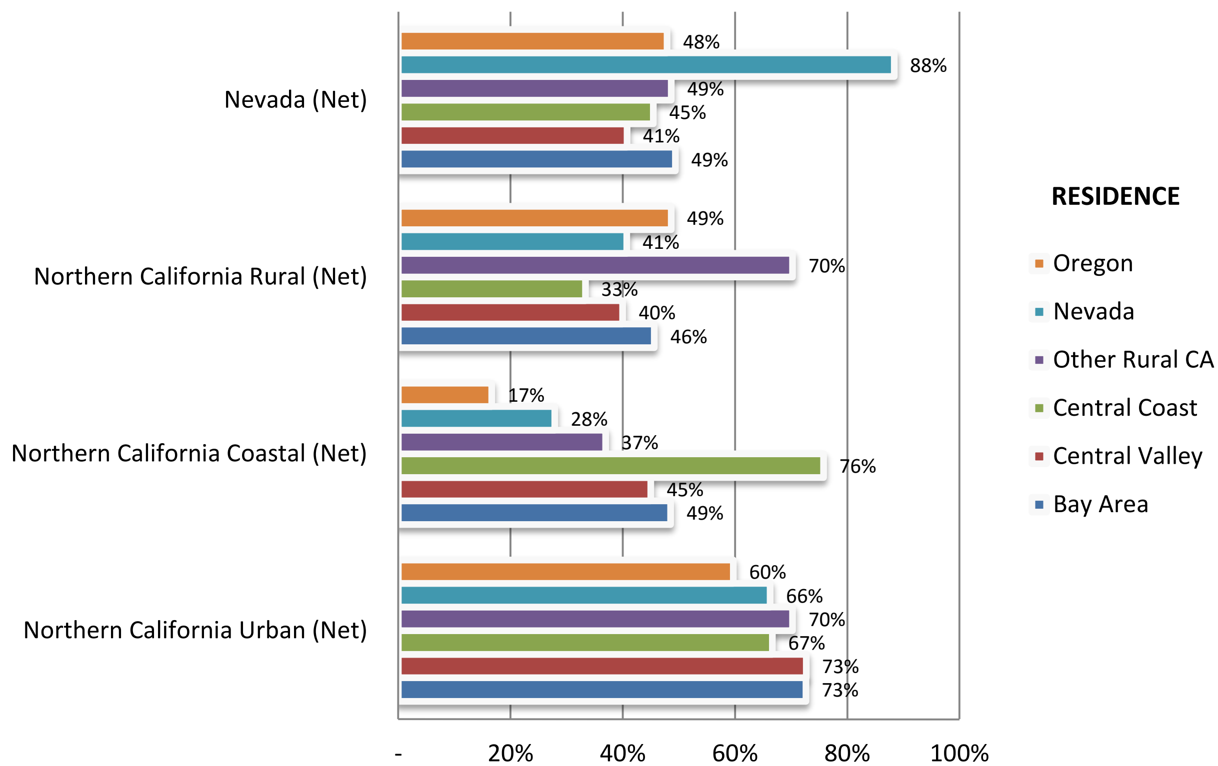
Figure 3
Respondent Destinations – All Destinations Visited for Overnight Leisure Trip in Past 12 months (in %)
(Base = All Respondents)



* Great Carson Valley defined as Genoa, Minden, Garnerville and Topaz.

- The Northern California central coast, Northern California rural areas and Nevada regions were visited far more frequently by respondents who live in those regions (see Figure 4).
- The Bay Area was a popular destination for respondents from all regions.

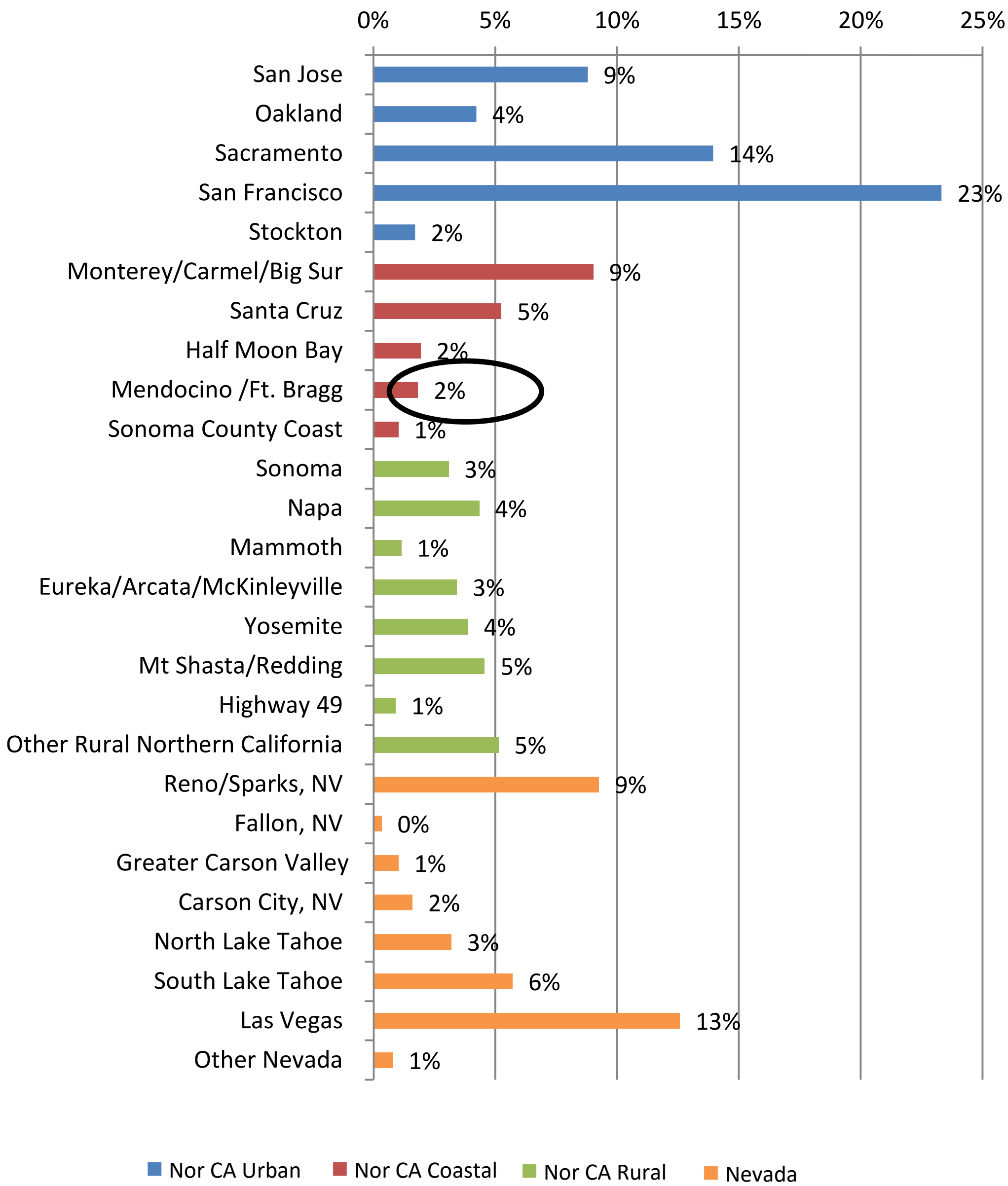
Figure 4
Destination Visited by Respondent Residence (in %)
(Base = All Respondents)



Most Recent Overnight Destination

- Respondents provided similar results when asked which single destination they had visited most recently for an overnight leisure trip.
- The most popular destinations was San Francisco (23%), followed by 14% who had visited Sacramento and 13% who had visited Las Vegas (see Figure 5).
- By overall region, 47% of respondents had visited Northern California urban areas, 30% had visited Nevada, 23% had visited Northern California rural areas and 18% had visited Northern California coastal areas (including 2% who had visited the Mendocino County/Ft. Bragg area)

Figure 5
Respondent Destinations – Last Destination Visited for Overnight Leisure Trip in Past 12 months (in %)
(Base = All Respondents)



* Great Carson Valley defined as Genoa, Minden, Garnerville and Topaz.

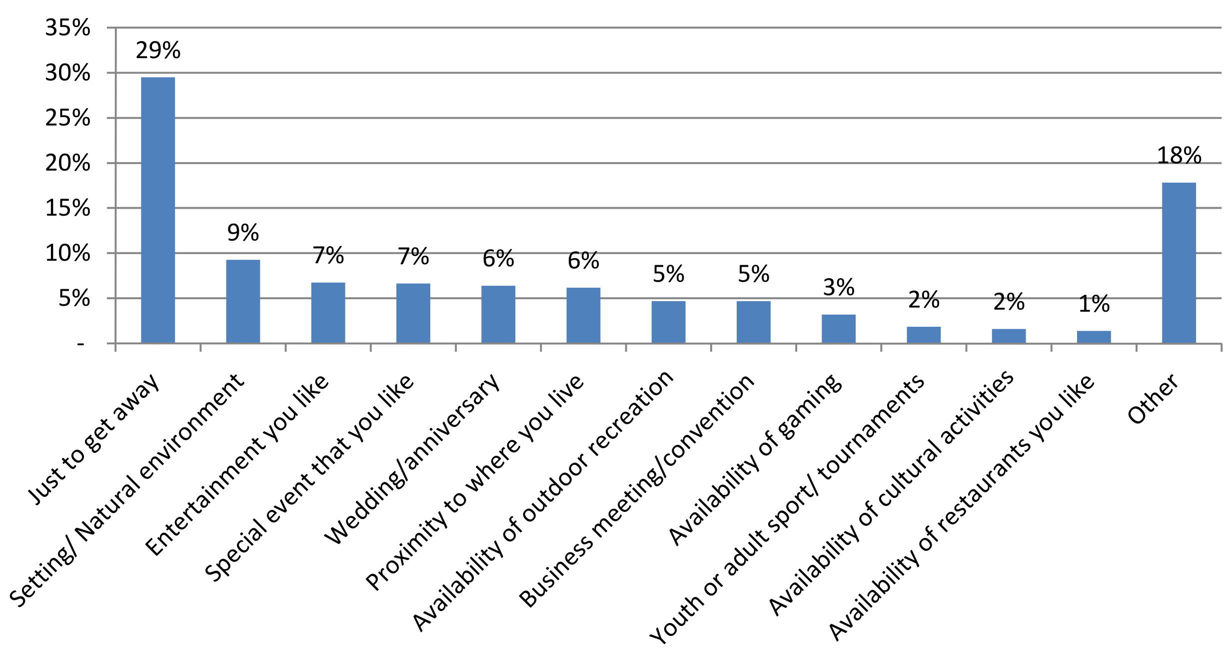
Part 2: Visitor Motivations

Respondents indicated the primary reasons they decided to visit their most recent destination, as well as the importance of several attributes in their decision to visit that destination.

A. Primary Reason for Visiting

- Respondents indicated the primary reason for their most recent overnight trip.
- Overall, the most popular reason was "just to get away," selected by 29% of respondents.
- Least popular selections included "availability of gaming (3%)," "sports tournaments (2%)," "availability of cultural activities (2%)" and "availability of restaurants (1%)."
- In general, reasons for visiting varied little by respondent residence.
    - An exception was respondents from the Central Coast, who were much more likely to cite "availability of outdoor recreation" (12%, compared with 3-6% among respondents from other areas).
- Mendocino/Ft. Bragg visitors were much more likely to select "setting/natural environment" (23%, compared with 9% among respondents overall).

Figure 6
Primary Reason for Visiting Most Recent Destination (in %)
(Base = All Respondents)



B. Importance of Attributes on Selecting Specific Destination to Visit

- Respondents were provided with a list of 16 attributes and asked to rate each on its importance to their decision to visit their most recent destination.
- Overall, “scenic beauty and natural attractions” rated highest, with 64% giving it a top-two rating (somewhat or very important) for their decision to select the specific destination they most recently visited.
    - **Mendocino/Ft. Bragg respondents rated “scenic beauty and natural attractions” significantly higher than other respondents, with 94% giving it a top-two rating (including 87% who gave it a top rating).**
- Followed by “value received for price paid” (63%), “convenience and time it takes to get to destination” (59%), and “availability of quality lodging choices (58%).
- “Youth/adult sports tournaments”(15%), “availability of wineries” (21%), “availability of attractions for children” (23%), and “availability of casino gaming” (24%) were the lowest-rated attributes.
- Respondents followed the same general pattern of attribute importance regardless of residence (see Figure 8). However, some interesting variances existed, including:
    - Respondents from the California central coast rated “scenic beauty and natural attractions” and “outdoor recreation” much higher than those from other areas.
    - Those from the San Francisco Bay Area placed a higher importance on “environmental reputation” than other respondents.
    - “Outdoor recreation” and “environmental reputation” were notably less important among those from outside California (Nevada and Oregon).
    - Those from Oregon tended to give lower importance ratings to attributes than other respondents, with the exception of “casino gaming.”

Figure 7
Attribute Importance for Selecting Specific Destination
Last Visited – Top 2 Box (in %)
(Base = All Respondents)

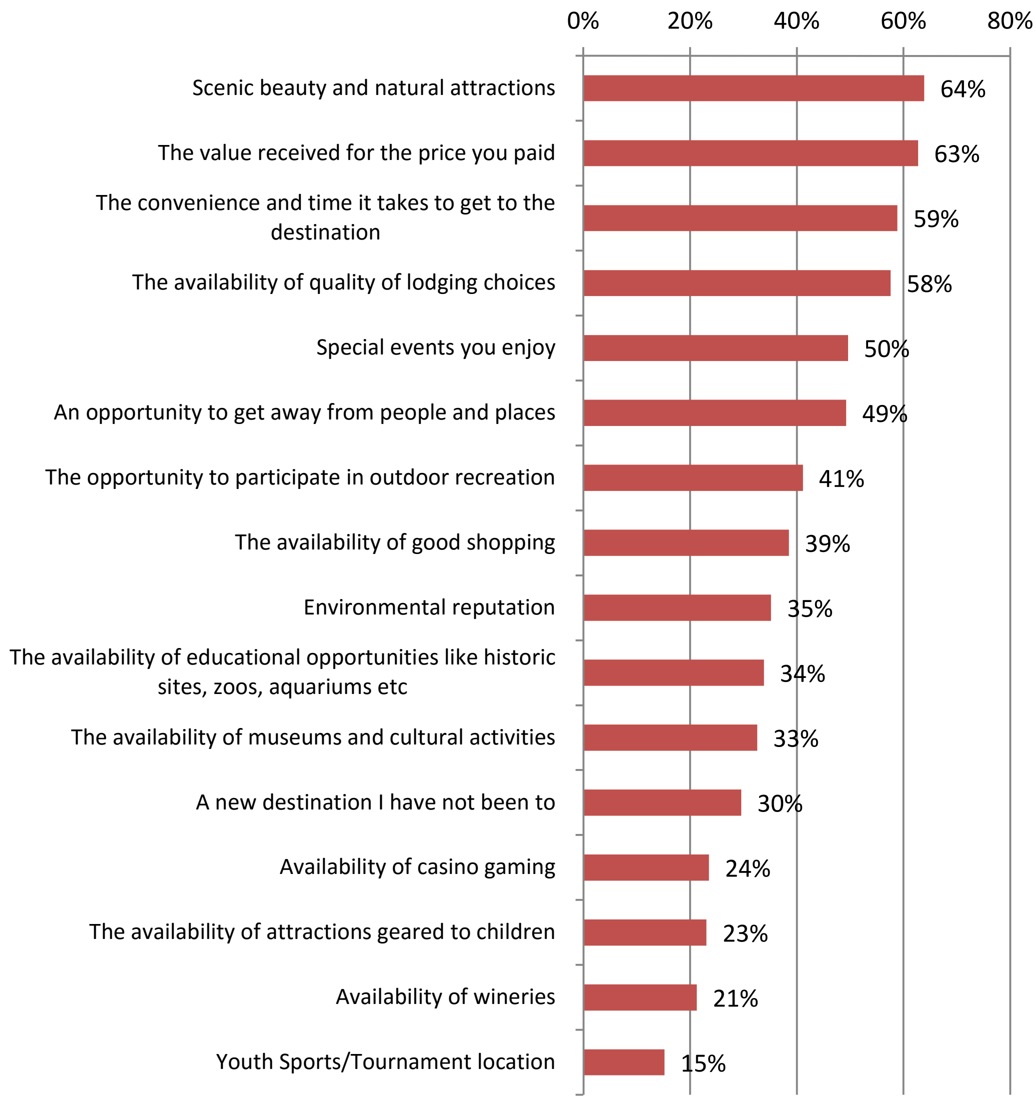


Table1
Attribute Importance for Selecting Specific Destination
Last Visited – Top 2 Box (in %)
By Respondent Residence
(Base = All Respondents)

	Bay Area	Central Valley	Central Coast	Other Rural CA	Nevada	Oregon
Scenic beauty/natural attractions	66%	65%	85%	71%	59%	51%
Value for price paid	61%	70%	61%	65%	63%	51%
Convenience/time to destination	65%	59%	70%	56%	62%	46%
Availability of quality lodging	63%	57%	48%	59%	55%	53%
Special events	50%	50%	48%	54%	47%	47%
Get away from people/places	54%	48%	58%	56%	41%	42%
Participate in outdoor recreation	47%	40%	61%	50%	31%	28%
Good shopping	39%	42%	33%	41%	31%	34%
Environmental reputation	46%	35%	39%	34%	21%	25%
Educational opportunities	36%	37%	36%	35%	26%	29%
Museums/cultural activities	36%	33%	27%	37%	24%	28%
New destination	34%	35%	27%	28%	20%	20%
Casino gaming	30%	25%	12%	18%	10%	25%
Attractions geared to children	28%	28%	15%	22%	17%	13%
Wineries	27%	23%	18%	18%	13%	17%
Youth sports/tournaments	21%	20%	12%	7%	9%	8%

C. Advertising Recall

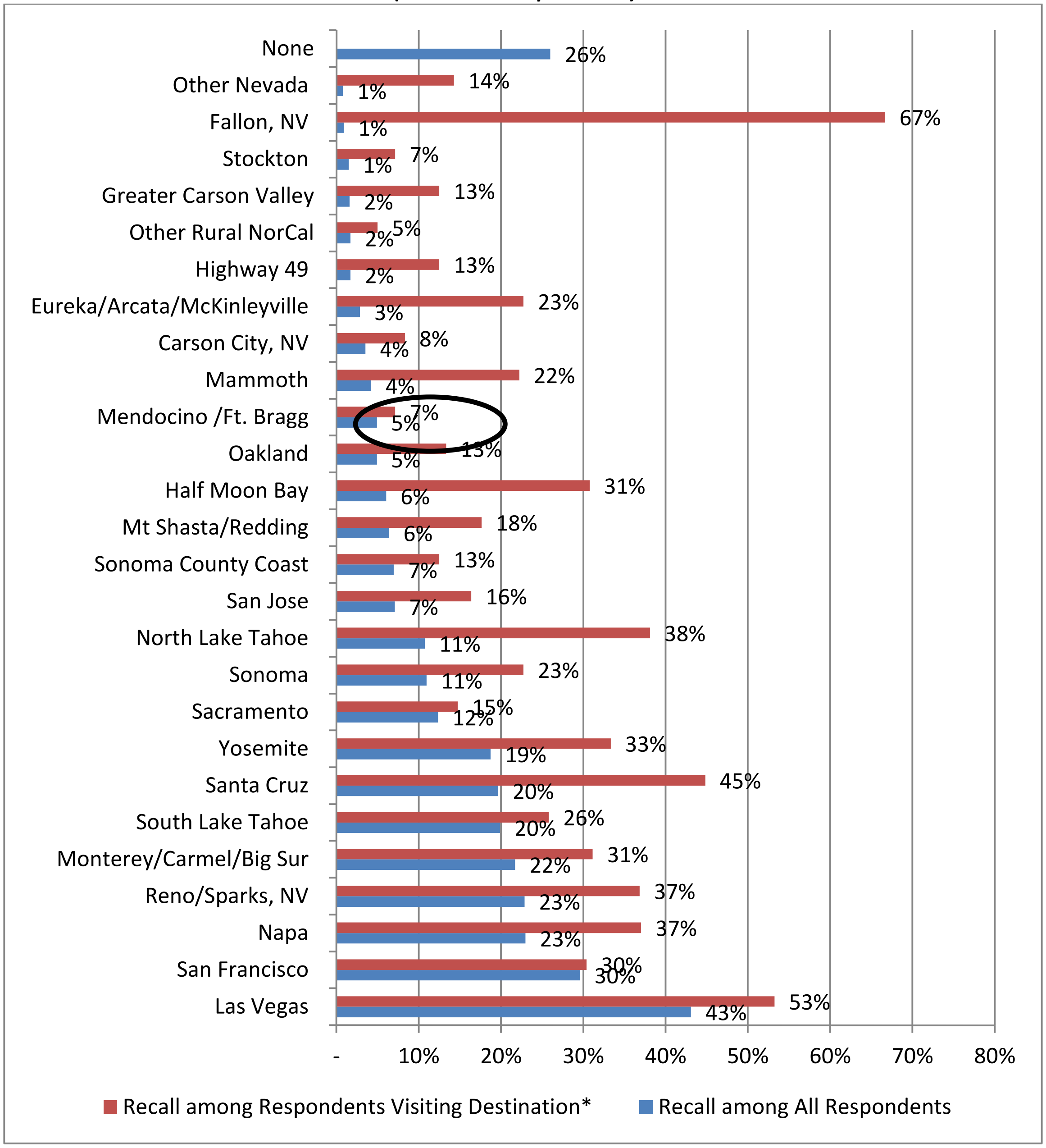
The survey asked respondents to list the Northern California and Nevada destinations for which they recalled seeing or hearing a specific advertisement.

- Las Vegas had the highest recall of any single destination (43%).
- Recall for Las Vegas advertising was also higher than advertising recall for entire regions as a whole.
    - For example, 38% of respondents recalled advertising for a Northern California rural destination, and 37% each recalled advertising for Northern California urban destinations and Northern California coastal destinations.
- Outside of Las Vegas, highest advertising recall included San Francisco (30%), Napa (23%), Reno/Sparks (23%),

Monterey/Carmel/Big Sur (22%), South Lake Tahoe (20%), Santa Cruz (20%) and Yosemite (19%).

- Only 5% of respondents recalled advertising for Mendocino.
    - This recall rate was comparable with Mt. Shasta/Redding (6%), Half Moon Bay (6%), Oakland (5%), Mammoth (4%), and Carson City (4%).
    - Mendocino advertising recall increased among respondents from rural California (10%).
- When looking at advertising recall by respondent destination, the data shows a clear correlation between advertising recall for a destination and likelihood of visiting that destination (see Figure 9).
    - San Francisco was the only destination that did not have an increase in advertising recall (30% among overall respondents and among visitors).
    - However, most other popular destinations received a significant spike in advertising recall among those who had visited that destination, including:
        - Las Vegas (53% among visitors, 43% overall)
        - Napa and Reno/Sparks (both 37% among visitors and 23% overall)
        - Monterey/Carmel/Big Sur (31% among visitors, 22% overall)
        - Santa Cruz (45% among visitors, 20% overall)
        - Yosemite (33% among visitors, 19% overall)
    - Mendocino/Ft. Bragg received only a slight increase among visitors (7%, from 5% recall overall).

Figure 8
Advertising Recall
by Total Recall (bars) and by Respondents who Visited that Destination during their last overnight leisure trip (line)
(Base = All Respondents)



*Sample of respondents visiting less-popular destinations may be very small and should be viewed in a qualitative frame of reference only. For example, only 3 respondents had visited Fallon, NV, but 2 of them recalled advertising, resulting in a large spike of advertising recall among Fallon visitors.

Part 3: Visitor Behavior

The survey asked respondents to detail the specifics of their travel in the past 12 months, including the number of overnight leisure trips they had taken, details about planning and purchasing their most recent overnight trip, the number of nights stayed, season visited, dollar amount spent, and the activities in which they participated during their stay.

A. Number of Overnight Leisure Trips

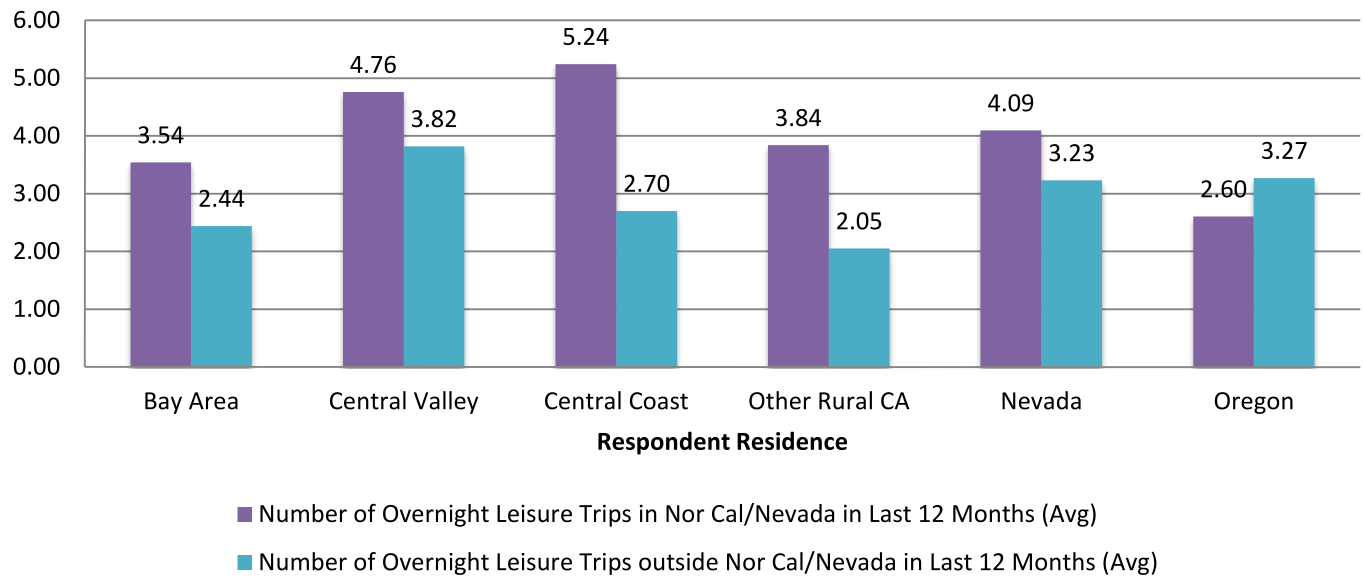
Within Northern California and Nevada

- Respondents reported taking an average of nearly 4 (3.9) overnight leisure trips within Northern California and Nevada within the past 12 months.
    - Respondents from the Central Coast (5.2 trips) and Central Valley (4.8 trips) averaged the highest number of overnight trips.
    - Respondents from Oregon averaged a significantly lower number of overnight trips to Northern California and Nevada (2.6); this is unsurprising given the additional travel distance.

Outside of Northern California and Nevada

- Respondents reported taking an average of 3 overnight leisure trips outside of Northern California and Nevada in the past 12 months.
    - As with trips within Northern California and Nevada, those from the Central Valley averaged a higher number of visits (3.82).
    - However, those from the Central Coast—who took the most trips within Northern California and Nevada—took fewer overnight trips elsewhere compared with most other respondents (2.7).
    - As expected, respondents from Oregon took more overnight trips outside of Northern California and Nevada (3.3) than within (2.6).

Figure 9
Average Number of Trips within and outside of Northern California/Nevada in Last 12 Months
(Base = All Respondents)



B. Trip Planning and Purchase

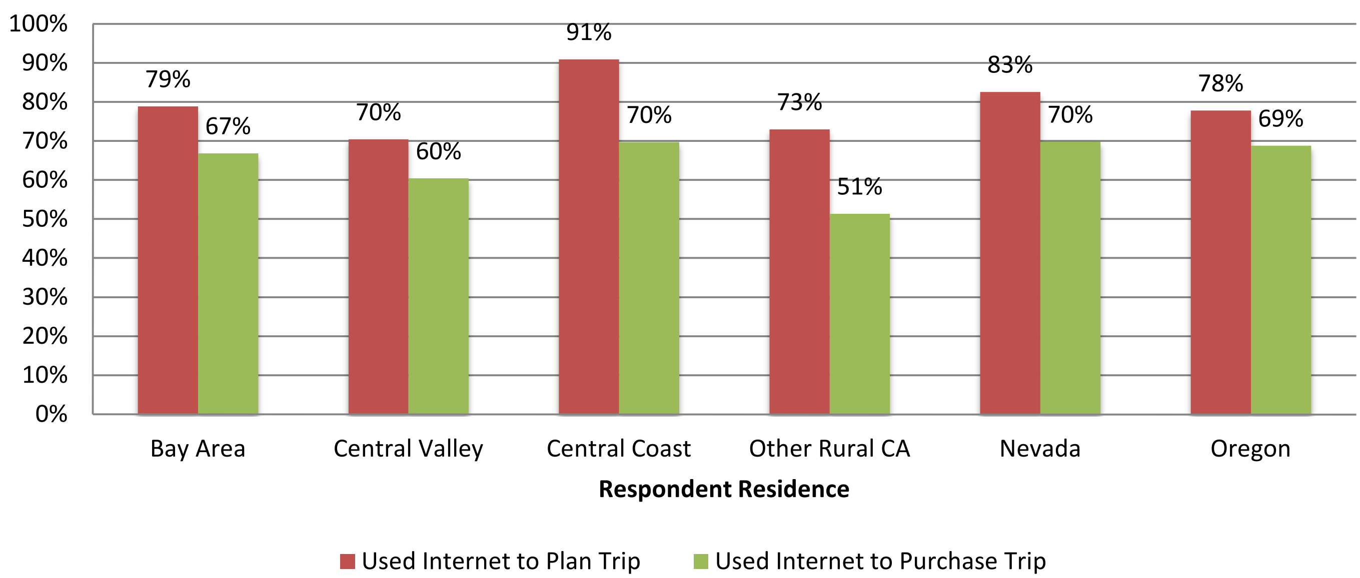
Internet for Planning and Purchase

- Overall, 76% of respondents indicated they had used the internet to plan and 64% had used the internet to purchase at least some part of their most recent overnight leisure trip.
    - This varied somewhat by respondent residence, with those from the Central Coast being most likely to plan online (91%), followed by those from Nevada (83%). These respondents were also slightly more likely to purchase online, with 70% each.
    - Those from the Central Valley were least likely to plan online (70%), and those from rural California were least likely to purchase online (51%).
    - By destination visited, those who visited Mendocino/Ft. Bragg were slightly more likely to use the internet to both plan (80%) and purchase (73%) at least some part of their trip, compared with other respondents.
- Respondents who had used the internet to plan or purchase some part of their most recent overnight leisure trip were asked to specify the websites they had used.
    - The most popular sites includes specific hotel websites and online travel sites (such as Expedia or Travelocity), with 36% each.

- Bay Area and Central Coast respondents used online travel sites more (45% each), while those from outside California were more likely to use specific hotel sites (43% among those from Nevada and 40% among those from Oregon).

  - Online review sites (such as Yelp or TripAdvisor) were also popular (with 28% of respondents), followed by specific destination sites (27%).
  - Specific airline sites and destination guides (such as Frommer's) were less popular, with 13% and 8%, respectively.

Figure 10
Respondents Used Internet to Plan/Purchase Most Recent Overnight Trip
(Base = All Respondents)



Reservation Methods

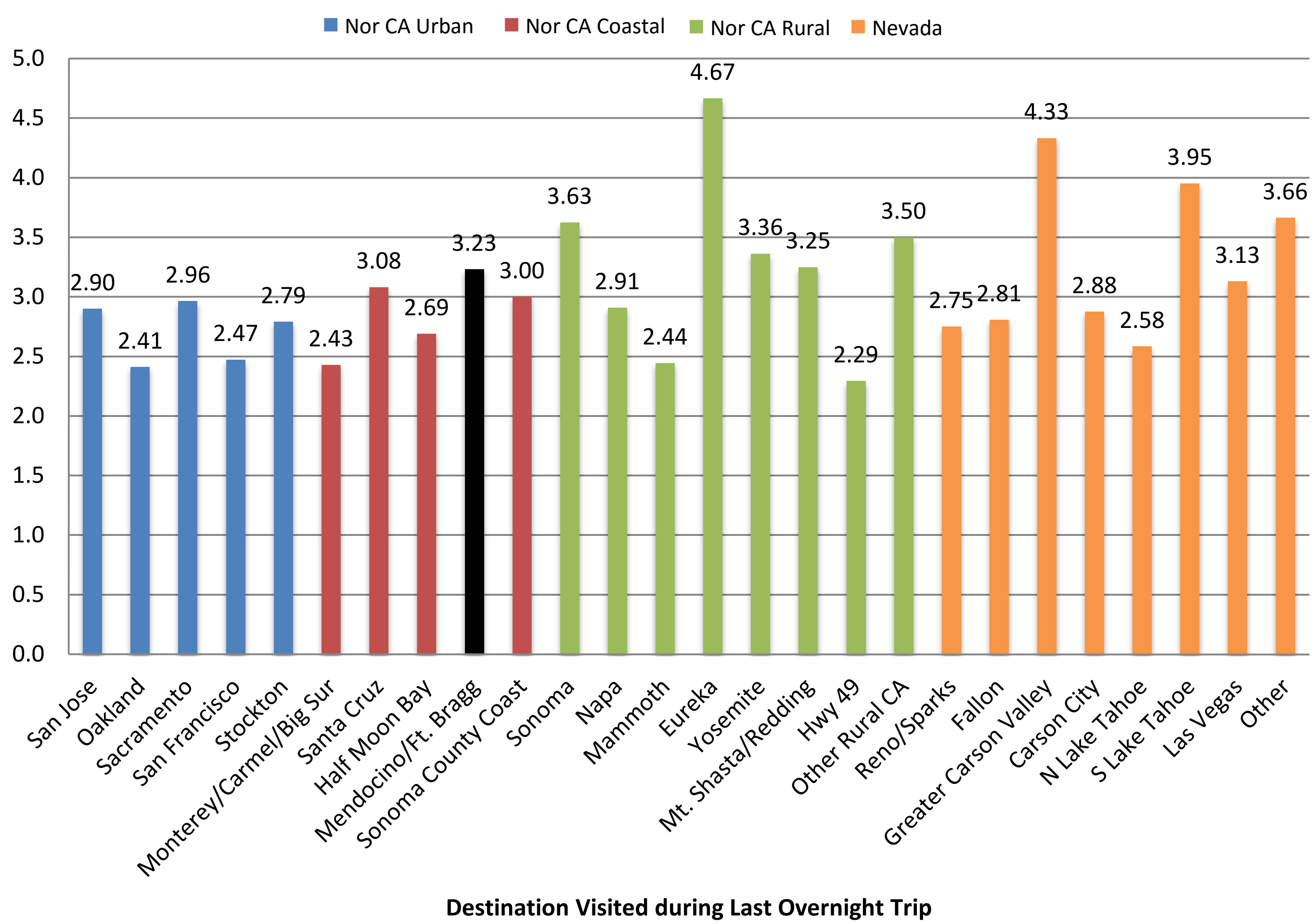
- The survey asked respondents to specify how they made their reservation for their last overnight leisure trip.
  - Purchasing via the property direct online was by far the most popular choice (46%), followed by property direct by phone (24%).
  - Those from the Central Coast (55%), the Bay Area (51%) and Nevada (50%) were most likely to purchase online.
  - Unlike other respondents, those from rural California were nearly as likely to purchase by direct by phone (31%) as direct online (36%).

C. Behavior during Trip

Number of Nights away from Home

- Respondents spent an average of nearly four nights (3.88) away from home on their last overnight leisure trip.
- Average stays were more than a day longer among respondents from the Bay Area (4.97) and more than a full day shorter among those from rural California (2.5).
- By destination visited, Nevada and rural California destinations averaged the longest stays, with those visiting Eureka averaging the longest (4.67), followed by those visiting the Greater Carson Valley (4.33) and South Lake Tahoe (3.95).
- Those visiting Mendocino/Ft. Bragg averaged 3.23 nights. Although lower than the overall average among all respondents, these visitors averaged the longest stays among those visiting Northern California coastal areas. See Figure 12.

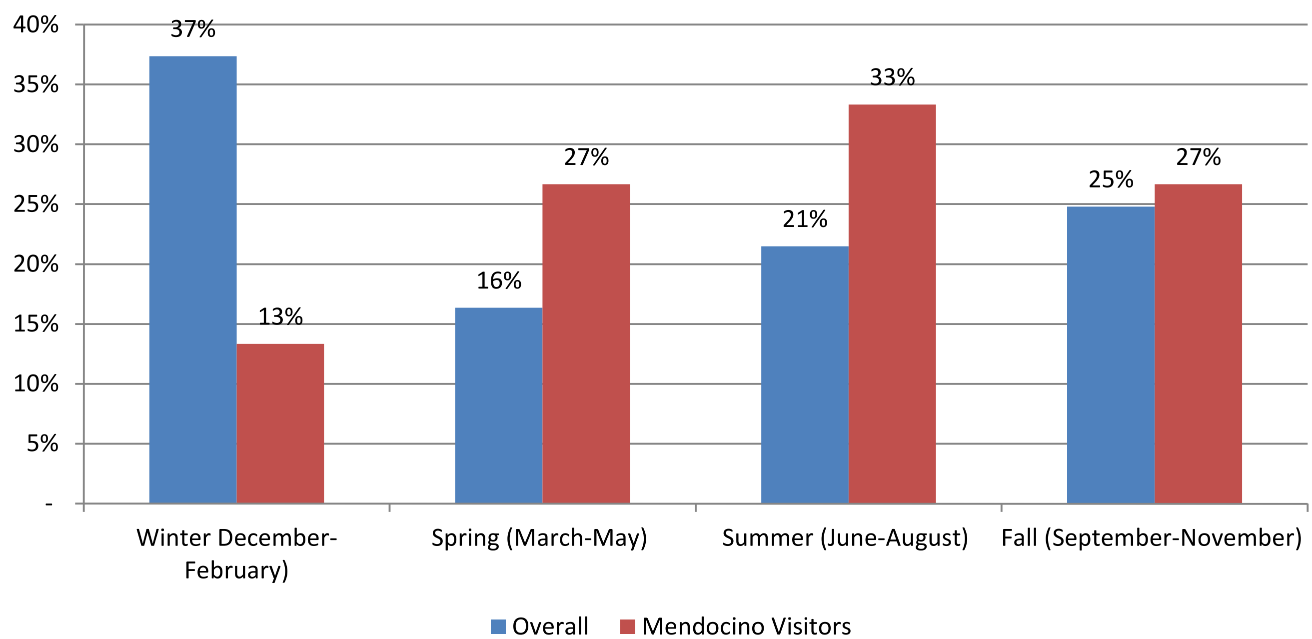
Figure 11
Average Number of Nights during Last Overnight Trip in Northern California/Nevada by Destination Visited
(Base = All Respondents)



Season Visited

- Overall, respondents were most likely to have visited their most recent destination in winter (37%), followed by fall (25%) and summer (21%). Spring was the least likely time to have visited (16%); however, this could be due to the timing of the survey (late winter) since most respondents had traveled more than once in the past year.
- The most significant differences occurred among those visiting from outside California:
    - Half of those from Nevada had visited in winter, compared with only 24% of those from Oregon.
    - Conversely, 31% of those from Oregon had visited in summer, compared with only 12% of those from Nevada.
- Those visiting Mendocino were much more likely to visit in summer (33% compared with 21% overall).
    - Santa Cruz and Napa attracted similar rates of summer visitors (30% and 33%, respectively).

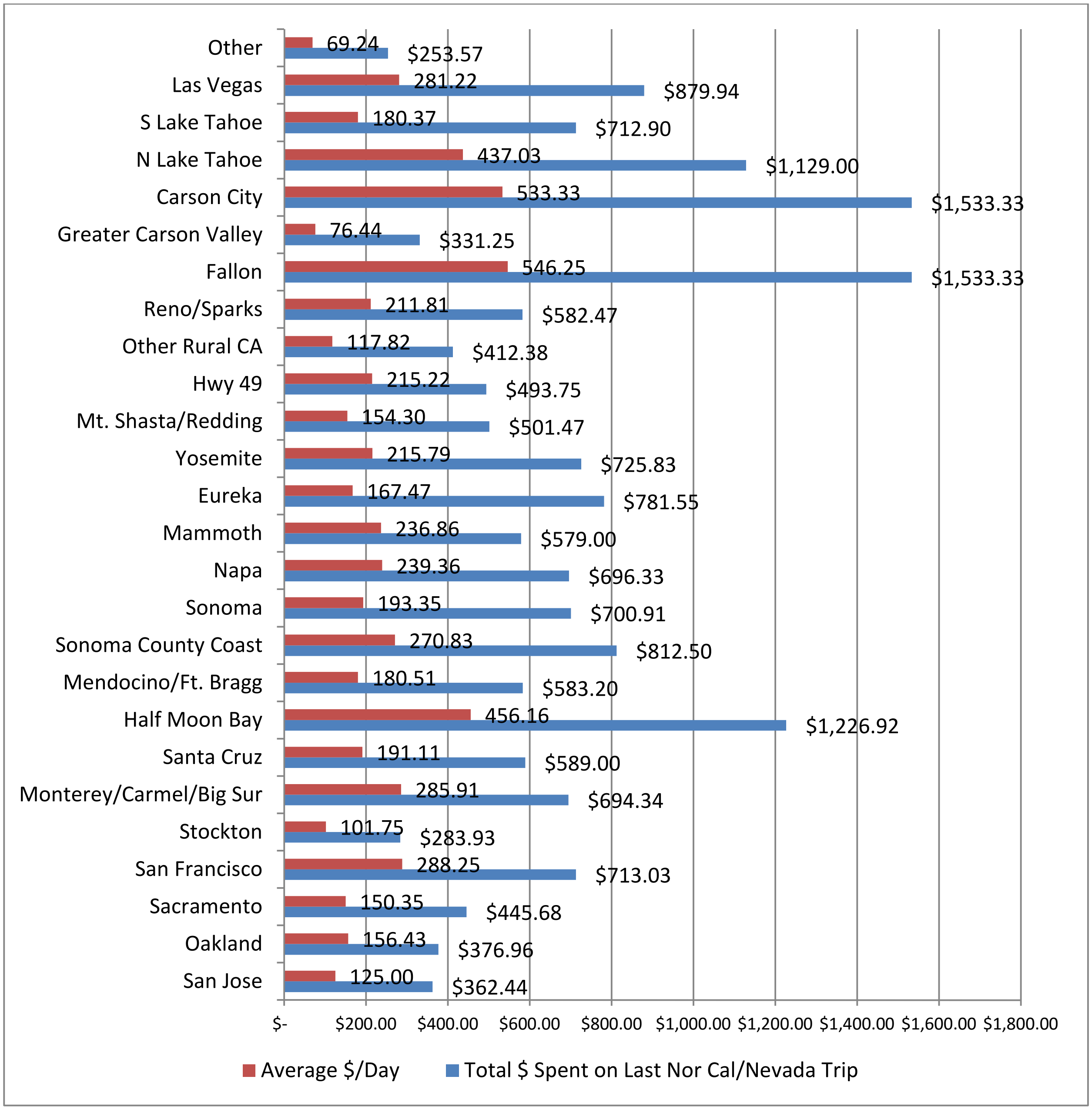
Figure 12
Season Visited: By All Visitors and Mendocino Visitors (N=15)
(Base = All Respondents)



Dollar Amount Spent on Last Overnight Trip in Northern California/Nevada

- On average, respondents spent $641 on the last overnight leisure trip they had taken within Northern California or Nevada in the past 12 months.
- When looking at dollar amount spent by most recent destination visited (see Figure 14):
    - The small number of visitors to Fallon (N=3), Carson City (N=8) and Half Moon Bay (N=13) averaged the highest dollar amounts spent.
    - Among more popular destinations, visitors to North Lake Tahoe and Las Vegas averaged the highest dollar amounts spent.
    - Those visiting Northern California urban areas tended to spend less.
        - Particularly among those visiting Stockton, who averaged only $102 daily and $284 for their entire visit.
        - San Francisco was an exception, with visitors averaging $288 per day and $713 per trip.
    - **Visitors to Mendocino spent slightly lower than average, with $583.**
        - **This is comparable to total dollar amounts spent by respondents who visited Santa Cruz ($589) and Mammoth ($579).**
        - **Those visiting Mendocino/Ft. Bragg and Santa Cruz also averaged similar daily expenditures ($181 and $191, respectively).**
        - **However, those visiting Mammoth spent an average of $236 daily, indicating a shorter stay with more spending than visitors to Mendocino/Ft. Bragg.**
- By respondent residence:
    - Those from Oregon spent significantly more than respondents from other locations, averaging $797. This was followed—at a distance—by those traveling from the Bay Area, who averaged $666.
    - Respondents from Nevada and rural California spent the least, averaging $543 and $550, respectively.

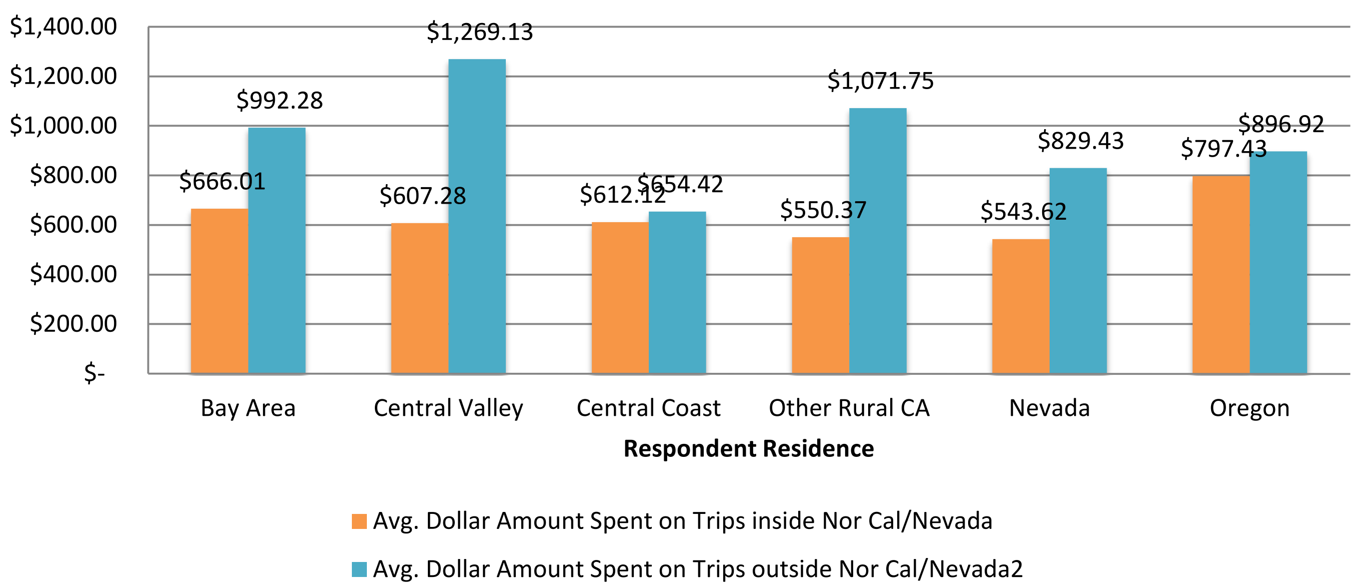
Figure 13
Dollar Amount Spent on Last Overnight Trip/Daily Dollar Amount Spent on Last Overnight Trip, by Respondent Destination
(Base = All Respondents)



Dollar Amount Spent on Overnight Trips outside of Northern California/Nevada

- Respondents spent significantly more on their overnight trips outside of Northern California and Nevada, averaging $1,140 (nearly $500 more than spent on their last overnight trip within Northern California/Nevada).
- Increased spending on trips outside Northern California/Nevada than those within was consistent among respondents from all regions:
    - Those from the Central Valley, who had reported taking the most overnight trips outside of Northern California and Nevada, also spent the most on these trips ($1,269).
    - However, those from rural California, who had taken the fewest overnight leisure trips outside of California, also spent more than average ($1,072).
    - Respondents from the Central Coast and Oregon varied the least in spending; those from Oregon spent an average of $99 more on trips outside Northern California/Nevada, while those from the Central Coast averaged just $42 more.

Figure 14
Average Number of Trips outside of Northern California/Nevada in Last 12 Months with Average Dollar Amount Spent on Last Northern California/Nevada Trip (Base = All Respondents)



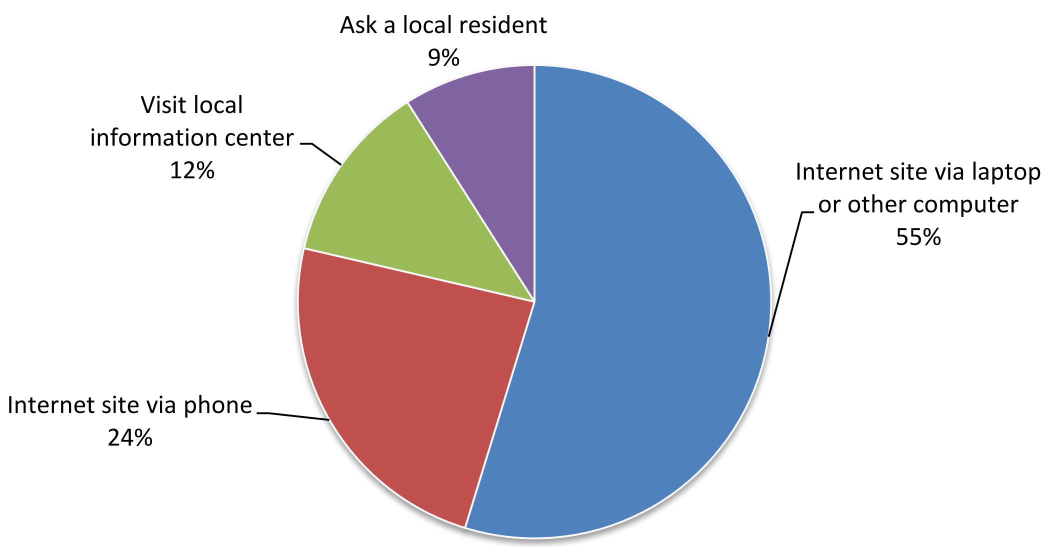
D. Information Access during Trip

Respondents indicated their preferences for accessing information about a destination if they were already visiting that destination.

Preferred Method for Accessing Information

- The survey asked respondents how they would be most likely to access information about a destination during their visit.
    - More than half (55%) indicated that they would access information about the destination online via their computer or laptop (see Figure 16)
    - Nearly a quarter (24%) stated they would access this information online via their phone.
    - Respondents were less likely to visit an information center (12%) or ask a local resident (9%).
    - Answers varied little by respondent residence.

Figure 15
Respondents Used Internet to Plan/Purchase Most Recent Overnight Trip
(Base = All Respondents)

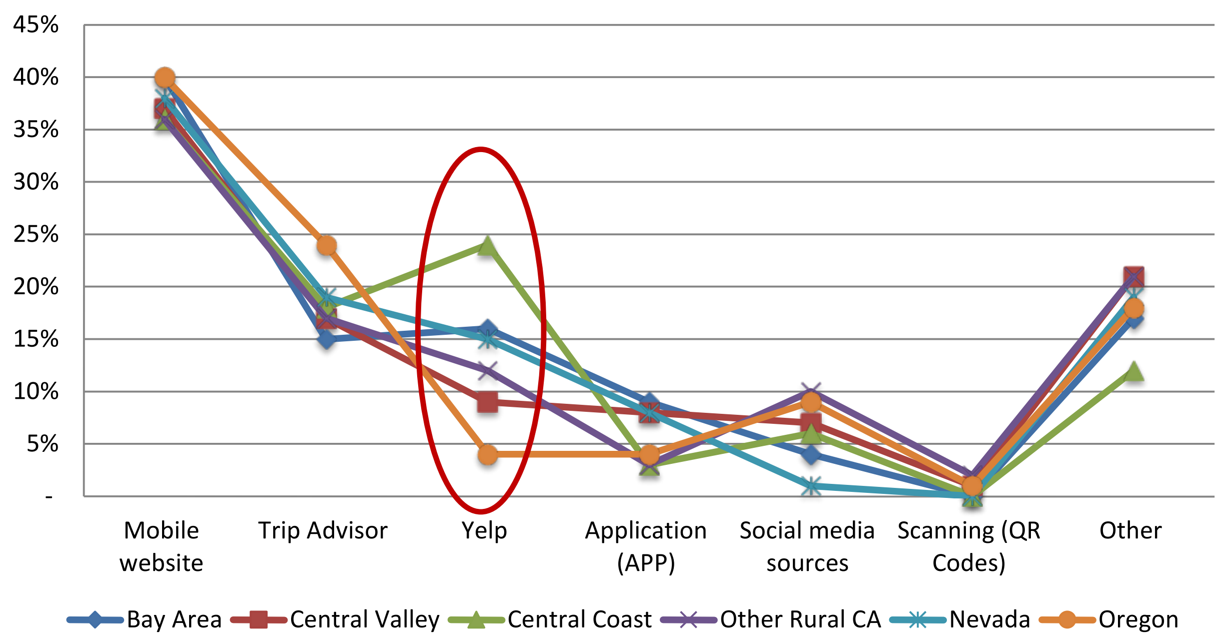


Online Information Sources

- Respondents also indicated the online sources they would be most likely to use to access information about a destination during their stay.
- "Mobile website" was the most popular single online source, with 38% of respondents selecting it.
    - This percentage was very consistent by respondent residence.
- TripAdvisor and Yelp were the next most popular online sources, with 18% and 12%, respectively.

- Trip Advisor showed a marked increase among respondents from Oregon, but was generally consistent among other groups.
- Yelp varied significantly by respondent residence, with respondents from the Central Coast selecting it much more often (24%) than those from Oregon (4%). See Figure 17.

Figure 16
Respondents Used Internet to Plan/Purchase Most Recent Overnight Trip
(Base = All Respondents)



Part 4: Future Travel and Visitor Loyalty

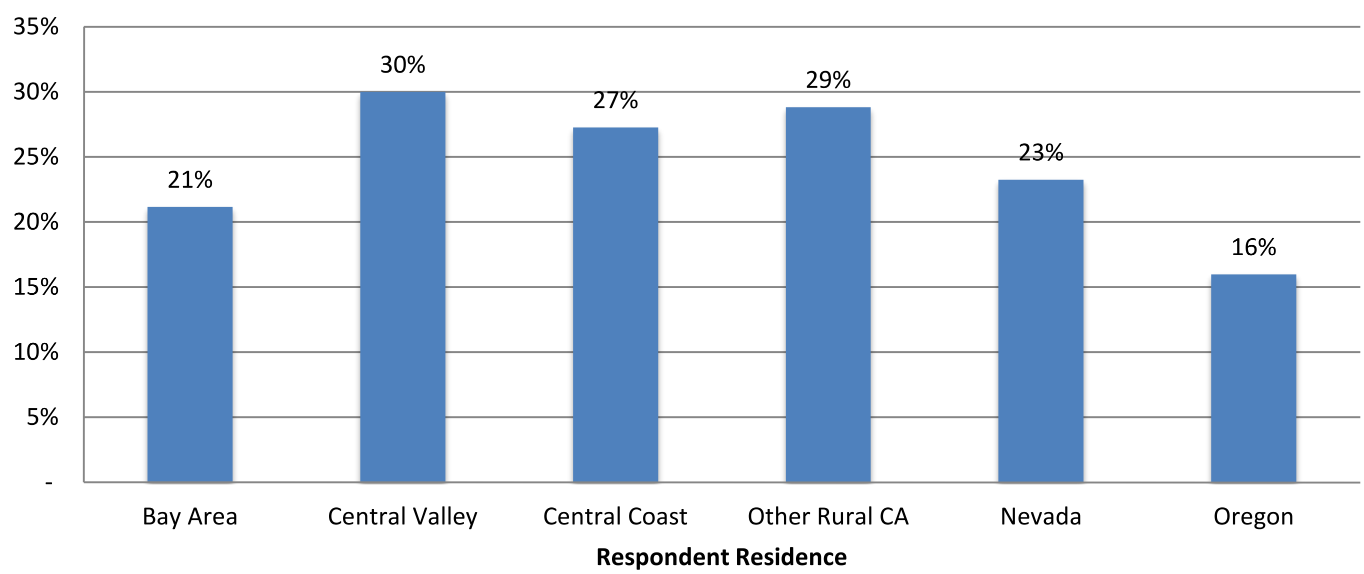
Respondents indicated their likelihood of future Northern California/Nevada overnight trips, and the destinations they are most likely to visit.

Respondents also provided Net Promoter Scores for the destination they most recently visited, which indicate their loyalty to a specific destination.

A. Future Overnight Leisure Trips

- Respondents indicated if they felt that their overnight leisure trips to Northern California/Nevada were likely to increase, decrease or stay the same over the next 12 months.
- Overall, 64% felt that the number of trips would stay the same, followed by 24% who felt they would increase. Only 12% felt the number of trips would decrease.
  - Respondents from the Central Valley were most likely to say their overnight trips would increase (30%), closely followed by those from rural California (29%) and the Central Coast (27%).
  - Respondents from Oregon were the only group with higher percentage of assumed decreased (20%) than increase (16%).

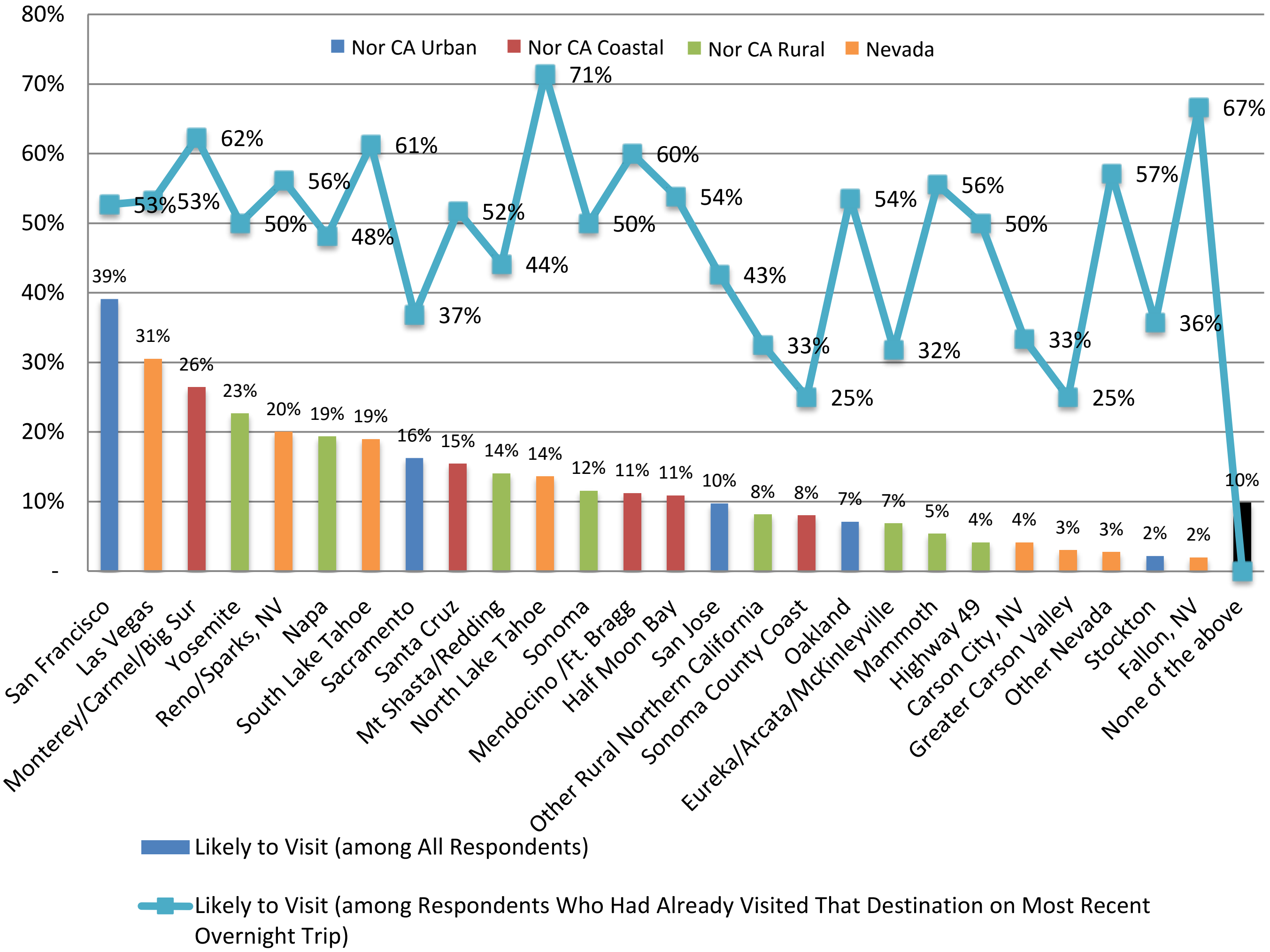
Figure 17
Respondents who Expect their Overnight Visits to Northern California/Nevada to Increase over the next year (in %) by Respondent Residence
(Base = All Respondents)



B. Most Likely Future Destinations

- The survey asked respondents to list the Northern California and Nevada destinations they are most likely to visit for an overnight leisure trip in the next 24 months.
- The most popular individual destinations included San Francisco (39%), Las Vegas (31%), Monterey/Carmel/Big Sur (26%) and Yosemite (23%).
- Overall, respondents were much more likely to select the destinations they had visited on their most recent overnight trip (see Figure 19).
    - **11% of respondents indicated that they were likely to visit Mendocino/Ft. Bragg.**
    - This is comparable to the percentage who felt they would visit Sonoma (12%), Half Moon Bay (11%), and San Jose (10%).
    - Respondents from the Central Coast and Oregon were least likely to visit Mendocino (3%), while those from rural California locations were significantly more likely to visit Mendocino (23%).
    - However, 60% of those who had visited Mendocino on their last overnight trip stated that they would be likely to visit again in the next 24 months (see Figure 19).

Figure 18
Northern California/Nevada Destinations Most Likely to Visit in Next 24 Months
By Total (Bar) and by Those Who Visiting that Destination on Most Recent Trip (Line)
(Base = All Respondents)



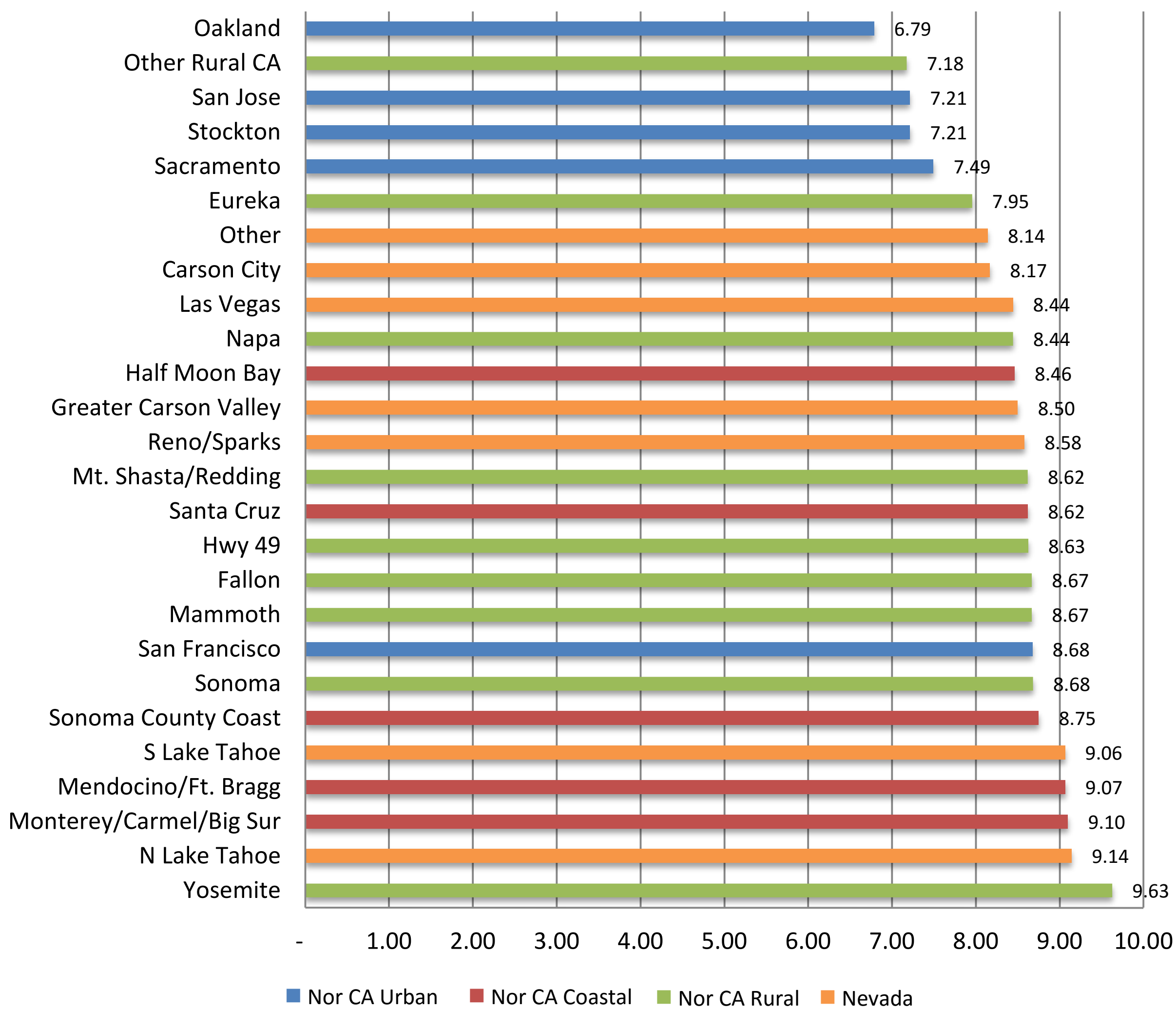
*Sample of respondents visiting less-popular destinations may be very small and should be viewed in a qualitative frame of reference only. For example, only 3 respondents had visited Fallon, NV, with 2 (67%) of them stating that they would visit again in the next 24 months.

C. Net Promoter Scores

- The survey asked respondents to indicate how likely they would be to recommend the Northern California/Nevada destination they had most recently visited to a friend or family member.
- This metric, called a net promoter score, indicates the respondent's loyalty to a specific destination.
- Overall, respondents averaged a net promoter score of 8.37 out of 10, which indicates a high level of loyalty to recently-visited Northern California and Nevada destinations.

- Overall, net promoter scores were generally consistent by respondent residence, with two exceptions
    - Respondents from the Central Coast gave notably higher scores (8.70 out of 10)
    - Those from Oregon gave notably lower scores (8.06 out of 10).
- By destination visited, Yosemite had the highest net promoter score (9.63 out of 10), followed by North Lake Tahoe (9.14), and Monterey/Carmel/Big Sur (9.10).
- Mendocino/Ft. Bragg had the fourth highest net promoter score, with 9.07 out of 10.

Figure 19
Net Promoter Scores by Destination Most Recently Visited (Avg.)
(Base = All Respondents)



Part 5: Visitor Profile

In order to get a better understanding of visitors, respondents provided detail on their media habits and activities/hobbies; rated their agreement with several statements about travel preferences; and demographic information.

This information is useful in targeting specific audiences for marketing, advertising and public relations campaigns.

A. Respondent Activities

Respondents provided detail on their media habits as well as the activities and hobbies they enjoy.

Media Activities

- The survey asked respondents to indicate the media activities they do regularly.
- Overall, television was the most popular media choice, selected by 78% of respondents, followed closely daily online surfing (76%).
    - Respondents from Nevada were somewhat less likely to watch TV (70%), while those from the Central Coast were less likely to select daily online surfing (64%).
    - Email was less popular among those from the Central Valley (64%) and Nevada (65%), but jumped notably among those from Oregon (80%).
    - Those from Oregon were also much more likely to participate in a social network (63%), particularly when compared with respondents from Nevada (52%).
    - Satellite radio was a popular choice among respondents from rural California (21%) and the Central Valley (20%), but was almost non-existent among those from the Central Coast (3%).

Activities

- When asked which activities they enjoy, half of respondents or more selected "enjoying the good life" (57%); "home life" (52%); "sports, fitness & health" (52%); "hobbies/interests" (51%); and "the great outdoors" (50%).
- "Tech activities" (33%) and "investing and money" (30%) were selected somewhat less often.
    - Respondents from the Central Coast were somewhat less likely to enjoy most activities compared with respondents from other locations, with the exception of "the great outdoors" (55%).

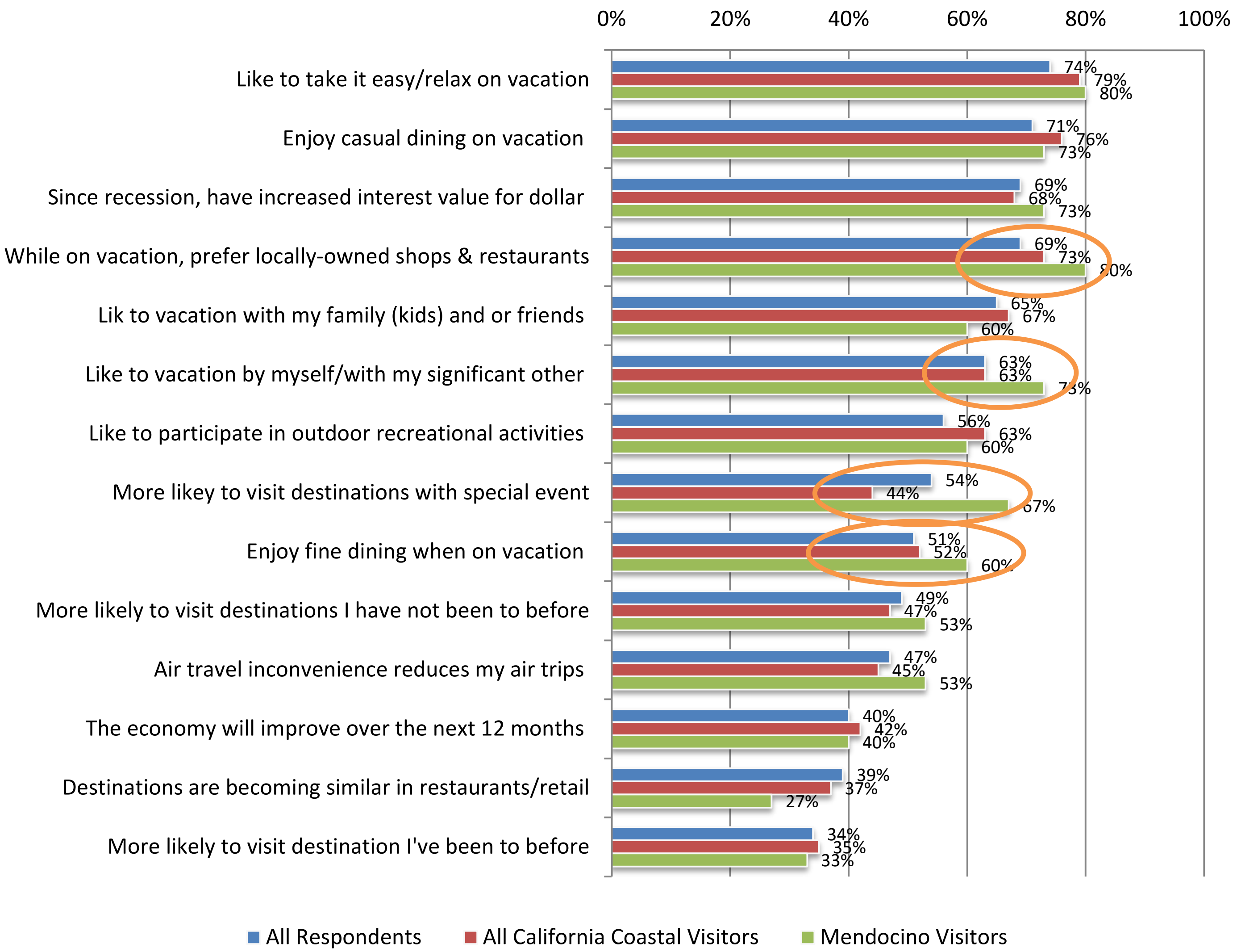
  - Overall, television was the most popular media choice, selected by 78% of respondents, followed closely daily online surfing (76%).
  - Those from Nevada were less likely to enjoy "home life" (42%) and "hobbies/interests" (45%), but notably more likely to enjoy "sports, fitness & health" (65%) and "the great outdoors" (60%).

B. Statement Agreement Ratings

The survey presented respondents with several statements and asked them to rate their agreement with each on a scale of 1 (disagree completely) to 5 (agree completely).

- Most respondents indicated that they "like to take it easy and relax while on vacation" (74% indicated a top-two box rating) and "enjoy casual dining when on vacation" (71%).
- Most also indicated that "since the recession, I have an increased interest in getting value for my dollar" (69%) and "while on vacation, I prefer locally-owned shops and restaurants to national brands" (69% each).
  - Compared with respondents from other regions, those from the Bay Area were somewhat less likely to "enjoy casual dining" and somewhat more likely to enjoy fine dining.
  - Respondents from the Central Coast were significantly less likely to "visit a destination I have been to before" (21% compared with 34% overall) and more likely to "visit a destination I have not been to before" (58% compared with 49% overall).
- **Respondents from Mendocino were especially likely to indicate that they:**
  - **"Prefer locally-owned shops and restaurants" on vacation (80% compared with 73% overall)**
  - **"Like to vacation by myself/with my significant other" (73% compared with 63% overall)**
  - **Are "more likely to visit destinations with a special event that appeals to me" (67% compared with 54% overall)**
  - **"Enjoy fine dining" while on vacation (60% compared with 51% overall).**

Figure 20
Attribute Agreement Ratings (Top-Two Box %)
By All Respondents, All California Coastal Visitors, and Mendocino Visitors
(Base = All Respondents)



C. Demographics

Respondents provided their gender, marital status, family status, age, income and ethnicity.

Gender

- The sample was about two-thirds female (65%) and one-third male (35%). This varied only slightly by respondent residence.

Marital and Family Status

- Just over half (56%) of respondents were married, with an additional 9% who were living together.
- 30% of respondents were single and 5% were widowed.
    - Respondents from outside California (Nevada and Oregon) were more likely to be married (62% each), and somewhat less likely to be single or widowed.
- The sample was split among respondents with no children (39%), those with children living at home (32%) and empty nesters (36%).
- In general, this varied little by respondent residence, however, respondents from the Central Coast were significantly less likely to have children (70% reported no children), followed by those from Nevada (48% had no children).

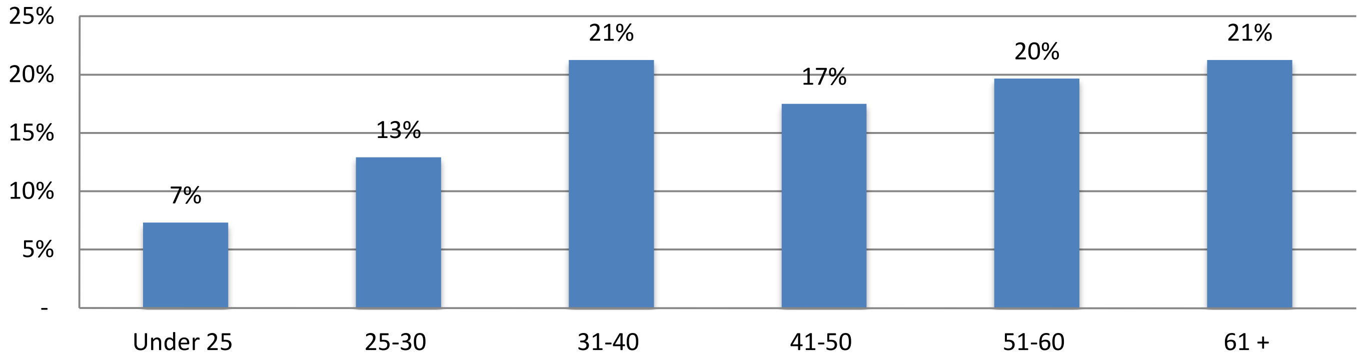
Age

- The sample included a variety of age groups, with 7% under 25, 13% between 25 and 30, and between 17% and 21% of other age groups (see Figure 22).
- The youngest respondents were from the Central Coast (38 years old on average), followed by Nevada (42 years old on average).
- The oldest respondents were from Oregon (52 years old on average) and rural California (48 years old on average).

Household Income

- Respondents reported a household income of $62,400 on average.
- Household income was highest among respondents from the Bay Area ($80,100), followed by Nevada ($71,360).
- Income was lowest among those from Oregon ($52,220) and the Central Coast ($55,000).

Figure 21
Respondent Age Groups (in %)
(Base = All Respondents)



Ethnicity

- About three-quarters of respondents were white (74%), followed by 13% who were Asian or Asian American and 7% who were Hispanic or Latino. Among other respondents, 2% or less reported being African American, Native American or Other.
- The Bay Area had the highest percentage of nonwhite respondents, with 58% white and 26% Asian or Asian American.
- Rural California had the highest percentage of white respondents (89%), followed by Oregon (86%) and Nevada (83%).