



VISIT MENDOCINO COUNTY
Quarterly Report ~ July – September 2019

Submitted to Mendocino County Tourism Commission & County of Mendocino
December 10, 2019



VMC Quarterly Activities Report: July – September 2019

Executive Summary

- The Executive Director (ED) and Director of Marketing & Media (DMM) worked with marketing consultants, TheorySF (TSF) and Media Matters WorldWide (MMWW) on the launch of new creative digital campaigns to target markets and audiences.
- During the quarter, staff made 112 contacts with lodging properties and other partners on HAP visits and as part of planning Mushroom Feast.
- The Festival, Marketing and Finance Committees continue to meet on a monthly basis; Visitor Services Committee and the Organizational Development Committee held their quarterly meetings.
- The Executive Director worked with the County of Mendocino to fill upcoming vacancies on the MCTC Board and BID Advisory Board.
- VMC staff continued to track their work as relating to the Strategic Plan.
- Public relations continued to reap great rewards from its media outreach with stories in the *Lonely Planet* guide, *Travel + Leisure*, *Robb Report*, *Modern Luxury*, *Departures*, and more. The PR team continued its monthly outreach to stakeholders and partners highlighting media coverage.
- The ED and Board Treasurer took a deep look into the operations of the North Coast Tourism Council (NCTC) and began working with the other members of the rural region to reorganize NCTC's operations.
- The MCTC Board of Directors directed the ED to look into the structure of the VMC sales department.

Strategic Plan

The activities in this report relate to the initiatives set forth in the three-year Visit Mendocino County (VMC) Strategic Plan that was put into action in 2017. The purpose of the plan was to realign the core strategies of the organization. (The Strategic Plan may viewed at <http://mendocinotourism.org/wp-content/uploads/Visit-Mendocino-County-Strategic-Plan-Rev-20181011.pdf>) This report directly relates the VMC Marketing, PR, sales, and other VMC staff activities during the quarter to the Imperatives, Objectives, and Initiatives contained in the Strategic Plan.

Vision:

Enriching experiences for our guests, enhanced lifestyle for our residents, and stability and diversity for our economy

Mission:

Visit Mendocino County stewards and amplifies the total Mendocino County experience.

Values:

- Transparency: We foster trust through openness and integrity.
- Accountability: We are outcome oriented and professional.
- Partnership: We create alignment through inclusive and meaningful relationships.
- Community: We contribute to the fabric of Mendocino County.
- Innovation: Our creativity reflects the uniqueness of our cultures and landscapes.

IMPERATIVE: Demonstrate and strengthen VMC's contribution to county economic and community vitality

• OBJECTIVE: BID assessment growth at 5% over average of top 3 competitors

In September 2019, the Mendocino County Treasurer-Tax Collector's office published the preliminary annual TOT/BID collections report (see below). As indicated in BID Data YOY table below, BID revenue showed a slight year-over-year decrease following years of steady growth. Without direct access to lodging property data, it's difficult to assess the possible contributory factors. Correlations between an increase in TOT in the second quarter but a decrease in BID are impossible to make in the absence of facts. Anecdotaly, a poor showing in the third quarter might be attributed to the intense rainfall experienced in the county. The massive wildfire in July 2018 undoubtedly had an effect on visitation to the county but again, without the data, anything VMC can offer is speculative at best.

TREASURER-TAX COLLECTOR COUNTY OF MENDOCINO (Data as of September 1, 2019)

Transient Occupancy Tax (TOT) Collections by Calendar Quarter

Fiscal Year	1st Quarter (July - Sept.)	2nd Quarter (Oct. - Dec.)	3rd Quarter (Jan. - March)	4th Quarter (April - June)	Fiscal Year Collections
2010-11	\$ 1,159,942.85	\$ 738,735.49	\$ 509,240.81	\$ 870,484.86	\$ 3,278,404.01
2011-12	\$ 1,257,508.60	\$ 784,212.12	\$ 604,215.73	\$ 926,946.51	\$ 3,572,882.96
2012-13	\$ 1,295,039.41	\$ 785,491.85	\$ 617,128.37	\$ 984,800.75	\$ 3,682,460.38
2013-14	\$ 1,377,790.23	\$ 894,744.19	\$ 676,573.91	\$ 1,072,883.77	\$ 4,021,992.10
2014-15	\$ 1,483,327.89	\$ 996,032.33	\$ 779,025.16	\$ 1,195,852.18	\$ 4,454,237.56
2015-16	\$ 1,651,009.69	\$ 1,073,998.95	\$ 835,844.53	\$ 1,298,416.75	\$ 4,859,269.92
2016-17	\$ 1,771,396.93	\$ 1,149,101.65	\$ 820,094.23	\$ 1,452,094.06	\$ 5,192,686.87
2017-18	\$ 1,994,982.25	\$ 1,223,461.26	\$ 1,018,540.84	\$ 1,457,731.72	\$ 5,694,716.07
2018-19	\$ 1,968,361.87	\$ 1,270,846.67	\$ 929,184.41	\$ 1,500,273.08	\$ 5,668,666.03

Business Improvement District (BID) Assessment Collections by Calendar Quarter

Fiscal Year	1st Quarter (July - Sept.)	2nd Quarter (Oct. - Dec.)	3rd Quarter (Jan. - March)	4th Quarter (April - June)	Fiscal Year Collections
2010-11	\$ 200,677.35	\$ 120,225.57	\$ 88,797.28	\$ 146,920.70	\$ 556,620.90
2011-12	\$ 214,391.01	\$ 127,996.14	\$ 103,057.37	\$ 158,824.10	\$ 604,268.62
2012-13	\$ 228,091.30	\$ 155,123.16	\$ 108,135.40	\$ 171,533.18	\$ 662,883.04
2013-14	\$ 243,828.04	\$ 149,944.46	\$ 116,839.01	\$ 185,967.80	\$ 696,579.31
2014-15	\$ 259,245.43	\$ 167,825.51	\$ 139,735.12	\$ 204,382.49	\$ 771,188.55
2015-16	\$ 273,600.95	\$ 178,776.82	\$ 147,456.87	\$ 222,007.69	\$ 821,842.33
2016-17	\$ 305,169.89	\$ 190,066.75	\$ 148,194.72	\$ 247,927.29	\$ 891,358.65
2017-18	\$ 333,850.91	\$ 213,895.87	\$ 171,966.42	\$ 252,024.26	\$ 971,737.46
2018-19	\$ 344,190.66	\$ 207,171.54	\$ 165,784.35	\$ 253,257.63	\$ 970,404.18

PLEASE NOTE: The collections reflected above represent the actual quarters in which the lodging establishments collected the taxes and assessments. If applicable, penalties and interest collected by the County are also included in the above totals. Previous fiscal year collections have been adjusted to reflect delinquent payments received in FY 2018-19.

BID DATA INCREASE/DECREASE YOY (11/19)		
2010-11	\$556,620.90	
2011-12	\$604,268.62	8.56%
2012-13	\$662,883.04	9.70%
2013-14	\$696,579.31	5.08%
2014-15	\$771,188.55	10.71%
2015-16	\$821,842.33	6.57%
2016-17	\$891,358.65	8.46%
2017-18	\$971,737.46	9.02%
2018-19	\$970,404.18	-0.14%

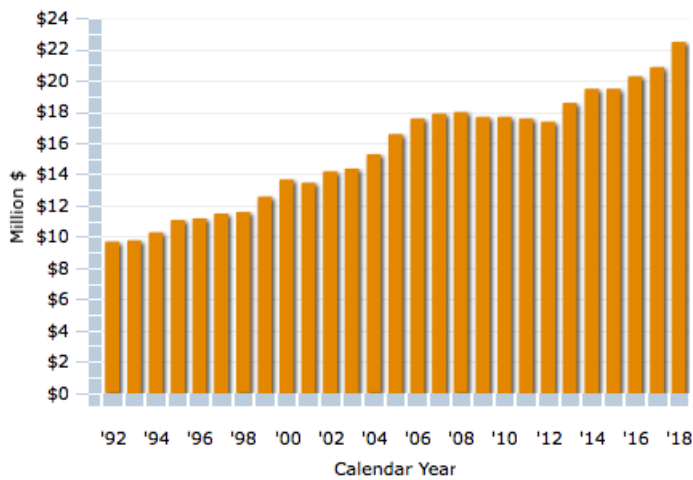
To address the objective that Mendocino County should sustain “BID assessment growth at 5% over average of top 3 competitors,” in the FY 2018/19 fourth quarter report VMC staff took a look at our competing destinations. The [online publication](#) of the California Travel Impact report’s data for each county enabled us to draw comparisons among a number of our competitors, rural and not, the results of which are set out below.

	TRAVEL RELATED SPENDING		% INCREASE / DECREASE YOY	SALES TAX REVENUE		% INCREASE / DECREASE YOY	EMPLOYMENT (TRAVEL SECTOR)		% INCREASE / DECREASE YOY
	2017	2018		2017	2018		2017	2018	
Mendocino	\$456.0M	\$482.2M	5.70%	\$39.9M	\$43.7M	9.50%	7.1K	6.9K	-2.80%
Humboldt	\$448.2M	\$453.2M	7.87%	\$36.6M	\$39.1M	6.83%	5.5K	5.5K	0.00%
Shasta	\$462.8M	\$519.6M	9.61%	\$35.9M	\$41.8M	16.43%	4.8K	4.9K	2.08%
Nevada	\$358.8M	\$379.4M	12.60%	\$28.8M	\$31.6M	9.70%	3.7K	3.8K	2.70%
El Dorado	\$910.0M	\$1,000.0M	9.90%	\$80.0M	\$90.2M	12.75%	11.7K	12.4K	5.98%
Sonoma	\$2,099.0M	\$2,200.0M	4.80%	\$169.0M	\$194.8M	15.20%	21.5K	22.3K	3.72%
Napa	\$1,699.0M	\$1,800.0M	5.90%	\$159.0M	\$164.5M	3.46%	18.0K	18.3K	1.66%

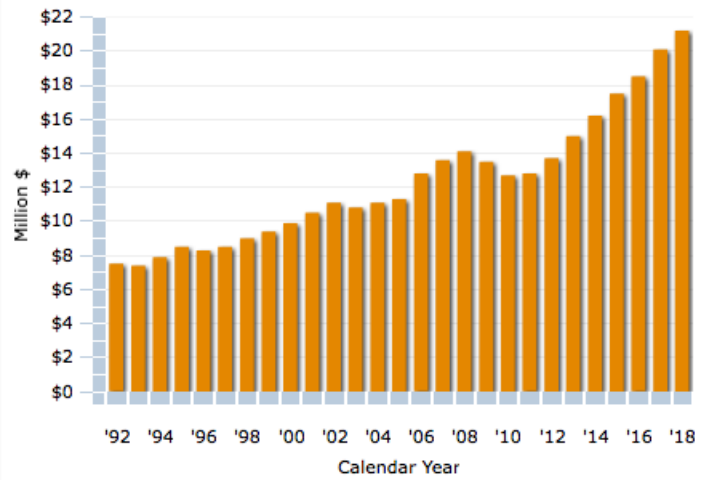
- OBJECTIVE: Year-over-year increase of sales tax receipts in Mendocino County**

The Dean Runyan report a/k/a California Travel Impacts report is used as the benchmark for tracking information such as destination spending, direct employment, and local and state tax receipts for the county. The report is published annually in May. As noted in the charts on the following page, tax receipts show a steady rise with a 7.7% YOY increase from 2017 to 2018. Data for CY 2019 will be published in May 2020.

**State Tax Receipts
Mendocino County**



**Local Tax Receipts
Mendocino County**



- **OBJECTIVE: Year-over-year increase in stakeholder and partner survey response rate**

The next survey to stakeholders and partners will be for Mushroom Feast Mendocino, which will take place in November 2019.

INITIATIVE: Increase tourism revenue through the development and implementation of the annual integrated marketing, public relations, and sales plan.

Activities during the quarter were based on: 1) the annual Marketing Plan (http://mendocinotourism.org/wp-content/uploads/Marketing-Plan_201920_final.pdf); and 2) the three-year Strategic Plan.

The DMM worked closely with the Public Relations agency of record, KOLI Communications, marketing consultant, TheorySF, and media buyers, Media Matters WorldWide, to achieve the goals described in the Marketing Plan.

Marketing campaign activity was stayed at the end of the 2018/19 fiscal year (June 30, 2019). During the months of August and September 2019, the DMM and ED worked with digital media buyers Media Matters WorldWide and marketing consultants, TheorySF, to create a media plan and timeline for FY 2019/20.

As in the prior campaign, the **campaign goals** are to:

- Raise awareness of Mendocino County as a tourist destination
- Increase visits to Mendocino county as indicated by VisitMendocino.com site traffic
- Increase Mendocino County brand awareness and positive perception

Campaign strategies are to:

- Drive positive awareness and engagement momentum on the VisitMendocino website by prospecting for new qualified Bay Area + Sacramento vacationers as well as reaching users identified as having intent.
- Drive visitor interest and website engagement by leveraging historical learnings and supporting key events:

- November 1 - November 10: Mushroom Feast
- January 24 - February 2, 2020: Crab Feast
- Whale Festival (first three weekends in March)
- **Timeline:** September 9, 2019 to March 31, 2020
- **Geo-targets:** San Francisco and Sacramento designated market areas
- **Target Audience:** Millennials, Gen-Y, and Gen-X; HHI: \$100k+

Channel Allocation:

- 65% social media, complementing VMC-owned social efforts with efficiency across Facebook, Instagram and YouTube. Each channel plays a vital role in the success of the campaign.
- Programmatic (30%), delivers efficiency and a bouquet of diverse tactics to amplify VisitMendocino.com messaging while being able to be easily and effectively optimized.
- The other 5% is for MMWW tracking and measurement fees.

Media Channels and Formats

- **Video (Desktop, Mobile, Tablet):** Used to drive deeper engagement delivering an emotive brand connection at scale across Facebook/Instagram, Programmatic, while testing newer platform YouTube.
- **Display + High-impact Programmatic Media:** Programmatic tactics will include display banners, including splashy high impact ad units, and video to disrupt and capture the attention and awareness of our audience. Programmatic will utilize a combination of approaches, both retargeting off the VisitMendocino.com site and prospecting new users including using relevant social media influencer contextual and audience targeting segments.
- **Social Media:** Build awareness of Mendocino County as a tourist destination across key Millennial, Gen-X and Gen-Y social platforms: Facebook, Instagram and YouTube. Amplify VMC's social influencers impact by running their "branded content" posts as standard ads within Facebook.
- **Programmatic** will leverage learnings from the 2018/19 campaign; utilize a mix of creative such as high impact, video, native and display to maximize creative strategy; incorporate both prospecting and retargeting strategies.
- **Paid social media strategy** will also leverage learnings from the 2018/19 campaign and utilize top performing platforms, including Facebook/Instagram. We will test new target segments. We will amplify the success of video content across YouTube videos and channels. We will continue to use a mix to reach current/prior site visitors, video viewers, social page engagers as well as net new prospects.

VMC continues to run radio spots with KOZT, beginning in September 2019, that reach not only a local audience but listeners in the Bay Area and Sacramento areas. The first radio spot was a call for events for Mushroom Feast, and a brand awareness spot.

The ED is currently in the research and development phase of recreating the VMC sales department and a sales plan that integrates with the approved 2019-2020 Marketing Plan.

INITIATIVE: Improve data-driven decision making through increased participation & “buy in” from all of our partners.

The intention for the City of Point Arena to rejoin the BID was put before the Board of Supervisors at their October 22, 2019 meeting with a public meeting to follow on either December 10 or 17, 2019. If there is no objection from City of Point Arena lodging representatives at that meeting, final adoption of the county resolution will take place at a subsequent Board of Supervisors meeting.

The website hit report to stakeholders continues to go out each month to each website listing for which there is an associated email address. The table on the following page shows the top ten outbound referrals from the VMC website for July through September. The effect of the start of the marketing campaign on September 9 is clear with a 62% increase in website traffic from August to September.

GOOGLE ANALYTICS: VMC SITE TOP TEN OUTBOUND REFERRALS Q1 2019-2020					
July		August		September	
Listing	Opens	Listing	Opens	Listing	Opens
Total Pageviews:	57,983	Total Pageviews:	49,125	Total Pageviews:	79,729
Montgomery Woods	330	Glass Beach	349	Montgomery Woods	269
Skunk Train	295	Montgomery Woods	292	Glass Beach	257
Vichy Springs	289	Vichy Springs	275	Stanford Inn	197
Glass Beach	286	Stanford Inn	232	Skunk Train	196
Stanford Inn	286	Skunk Train	199	Bowling Ball Beach	169
Little River Inn	205	Lake Mendocino Rec Area	196	Little River Inn	164
Lake Mendocino Rec Area	205	Little River Inn	182	Point Arena Lighthouse	151
Orr Hot Springs	175	Orr Hot Springs	165	Vichy Springs	143
Jackson Demo Forest	155	Jackson Demo Forest	163	Chandelier Drive-Thru Tre	140
Gualala Hotel	143	Gualala Hotel	162	Jug Handle State	125

The PR team (Koleen Hamblin and DMM) communicates with partners and stakeholders on a monthly basis informing them of high profile media stories. The PR team also affords stakeholders and partners the opportunity to submit content and information to VMC for Visit California’s dissemination. During the quarter the PR team hosted 11 FAM visits (with an annual goal of 18) to Mendocino County by members of the media.

VMC staff continues to identify additional partners (vacation rentals are top priority), create a website listing for each of them, and bring them into the reporting fold. The VMC team also actively identifies new businesses opening in the county, making a point to visit properties, meet the owners, and record the information in the team’s FileMaker database and MailChimp email resource. The PR team also tracks new and noteworthy openings/upgrades to disseminate twice per year to domestic and international media with the goal of gaining exposure and media visitation.

As VMC’s stakeholders see positive results from VMC’s efforts to raise awareness of the County, the team anticipates a greater “buy-in” in terms of increased trust in VMC and participation in festivals, trade shows, content submissions, etc.

The ED and PRM are working with hotel operators to continue contracts with tour operators, Rocky Mountain Holiday Tours and Bonotel. With the reorganization of the sales department, no new contracts have been solicited or entered into.

Since Q1 2017, VMC has subscribed to Visa Vue, a service offered through Visit California. Visa Vue provides an analysis of domestic and international cardholder visitor spending patterns in the county on a calendar year quarterly basis. VMC staff has undertaken a thorough analysis of the YOY international data, which is shown in Appendix 1. It should be noted that Visa claims to represent approximately 44% of credit card sales (not just in Mendocino County); the remaining percentage are sales made with Mastercard, American Express, Discover, and other credit cards. VMC does not have access to this data set but one can extrapolate from the data we do have. Another note is that apart from the total dollar amount, spending levels are given in \$100,000 increments so a more granular analysis is impossible to make.

International spending YOY for the third calendar quarter of the year decreased by 0.1%. Some key international highlights for the quarter:

- 8,505 international cardholders (8,290 consumer; 215 commercial) with a total spend of \$1,025.077, an average spend of \$62.69 per ticket, and an average spend per cardholder of \$120.53; a decline over the second quarter of 0.1%.
- Canada remains the top originating country for both the number of cardholders and spend amount, followed by Germany.
- The top market categories by spend amount are lodging, eating places and restaurants, and grocery stores/supermarkets.
- The top market segments by international cardholder count are fuel, food and grocery, and restaurants followed by lodging.
- Countries and territories showing the most YOY spend growth were Canada (5.5%), China (92.8%), Mexico 31.1%), New Zealand (43.4%), and Spain (1.9%). Countries showing decreased YOY spending were Germany (-9.1%), France (-10.1%), Switzerland (-8.1%). Please see Appendix 1 for a YOY breakdown.

On the domestic cardholder front, visitors from the SF Bay Area and Sacramento, VMC's target geo areas for marketing efforts, make up a 31% of total spending for the third quarter of the calendar year, while California cardholders, as a whole, account for 86.92% of all cardholders. (See figure on page 8.)

DOMESTIC CARDHOLDER SPEND IN MC CALENDAR QUARTERS

CY Q3 2019

	Cardholder Count	Sales Amount	Count	Cash Amount	AVG Ticket	Count	Sales Amount
ALL TRANSACTIONS	1,056,946	\$145,402,003	2,946,013	\$5,901,200	\$49.36	996,822	\$131,692,769
SF BAY AREA	256,386	\$21,660,850	408,370	\$689,726	\$53.04	242,922	\$19,891,950
SACRAMENTO	75,492	\$5,722,404	115,159	\$154,025	\$49.69	71,837	\$5,314,204
GEO AREAS	331,878	\$27,383,254	523,529	\$843,750		314,759	\$25,206,154
% OF TOTAL	31.40%	18.83%	17.77%	14.30%		31.58%	19.14%
	Cardholder Count	Sales Amount	Count	Cash Amount	AVG Ticket	Count	Sales Amount
UNSPECIFIED CA	469,867	\$97,797,058	2,026,816	\$4,155,172	\$48.25	440,827	\$87,892,465
BAKERSFIELD	3,867	\$199,753	5,645	\$8,532	\$35.39	3,640	\$172,418
CHICO/PARADISE	24,841	\$2,293,801	41,161	\$62,443	\$55.73	23,060	\$2,048,206
FRESNO	4,490	\$357,943	7,412	\$17,759	\$48.29	4,194	\$321,639
LA & AREA	34,809	\$2,826,445	53,180	\$95,150	\$53.15	32,497	\$2,597,169
MERCED	1,398	\$100,925	2,240	\$15,949	\$45.06	1,323	\$89,843
MODESTO	5,015	\$376,350	7,452	\$15,840	\$50.50	4,717	\$336,910
REDDING	5,972	\$523,237	10,673	\$17,792	\$49.02	5,473	\$432,261
SALINAS	3,493	\$291,166	5,549	\$16,002	\$52.47	3,259	\$235,664
SAN DIEGO	8,975	\$710,554	13,767	\$29,798	\$51.61	8,442	\$646,094
SLO	3,116	\$242,826	4,769	\$8,015	\$50.92	2,889	\$205,518
SANTA BARBARA	2,311	\$171,491	3,365	\$9,062	\$50.96	2,171	\$155,501
STOCKTON	6,761	\$520,677	10,283	\$25,093	\$50.63	6,374	\$464,725
VISALIA, TULARE	1,689	\$90,840	2,633	\$4,042	\$34.50	1,571	\$75,336
YUBA CITY	10,202	\$809,328	15,527	\$25,007	\$52.12	9,808	\$762,212
TOTAL	586,806	\$107,312,395	2,210,472	\$4,505,656		550,245	\$96,435,961
CA TOTAL	918,684	\$134,695,648	2,734,001	\$5,349,407		865,004	\$121,642,116
CA AS % OF ALL STATES	86.92%	92.64%	92.80%	90.65%		86.78%	92.37%

INITIATIVE: Develop a data sharing process that offers context and insights for partners

The DMM and Executive Director met with the Treasurer-Tax Collector and staff to establish a reporting cycle for paid and unpaid BID properties. VMC now receives these reports on a quarterly basis. The reports are used to guide VMC staff in Board and BID recruitment as well as vetting properties for website and promotion opportunities.

IMPERATIVE: Cultivate VMC's relationships & collaborations

VMC staff and Mendocino Winegrowers Inc. selected the Berkeley Country Club in El Cerrito as the venue for Taste Mendocino 2020.

The DMM attended marketing meetings for the Visit Fort Bragg organization, which is now run by the City of Fort Bragg. The City will be hiring a consultant to assist them with marketing and public relations efforts.

The ED is on the boards of Anderson Valley Winegrowers Association, Mendocino Coast Chamber of Commerce, and Mendocino College Foundation, as well as on the Visit Ukiah committee. The PRM is on the boards of the Willits Chamber of Commerce and Destination Hopland. The DMM sits on the board of Ukiah's School for Performing Arts & Cultural Education.

In September 2019, the ED and PRM attended a meeting of NCTC partners with the purpose of reorganization, the seating of a new board, and appointment of a new administration. The NCTC board now comprises: Co-chairs Jennifer Seward (Mendocino) and Julie Benbow (Humboldt); Treasurer Cindy Vosburg (Del Norte); and Secretary Larry Galupe (Lake). The newly seated board appointed Visit Mendocino County as the administrator of the organization.

OBJECTIVE: YOY increase in partner participation in festivals

Staff worked on the 2019 Mushroom Feast Mendocino. The table in Appendix 2 is a look at festival participation over time. As the concept for the mushroom and crab festivals has changed over the years, a precise YOY comparison is difficult to make.

The Festival Committee has begun planning for the reintroduction and evolution of a Spring festival to be held April 22–May 3, 2020. The concept includes partnering with existing events such as Hopland Passport to maximize marketing efforts and drive visitation.

• OBJECTIVE: YOY increase in “opportunities” page visitation on VMC website

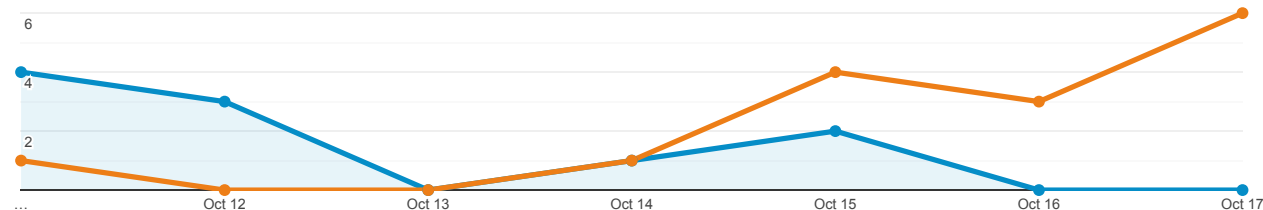
MCTC’s internal website, MendocinoTourism.org, is the repository for information, agendas, minutes, reports, plans, and research relating to the Mendocino County Tourism Commission. One of the site pages is “Opportunities,” where notifications about MCTC Board of Directors and BID Advisory Board seats, trade show and educational opportunities, among other notices.

VMC staff has recommended to the MCTC Board of Directors the following change in the verbiage of this objective: **YOY increase in “opportunities” page visitation on the MendocinoTourism.org website.**

OPPORTUNITIES PAGE VISITATION

Oct 11, 2019 - Oct 17, 2019: ● Pageviews

Oct 11, 2018 - Oct 17, 2018: ● Pageviews



Page	Pageviews	Unique Pageviews	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
	33.33% ▼ 10 vs 15	27.27% ▼ 8 vs 11	101.53% ▲ 00:03:18 vs 00:01:38	400.00% ▲ 5 vs 1	100.00% ▲ 80.00% vs 0.00%	12.50% ▲ 60.00% vs 53.33%	0.00% \$0.00 vs \$0.00
1. /opps/							
Oct 11, 2019 - Oct 17, 2019	10 (100.00%)	8 (100.00%)	00:03:18	5 (100.00%)	80.00%	60.00%	\$0.00 (0.00%)
Oct 11, 2018 - Oct 17, 2018	15 (100.00%)	11 (100.00%)	00:01:38	1 (100.00%)	0.00%	53.33%	\$0.00 (0.00%)
% Change	-33.33%	-27.27%	101.53%	400.00%	∞%	12.50%	0.00%

- **OBJECTIVE: Solicit new applicants for BID and MCTC Board positions and committee membership**

Applications have been filed for three seats on the MCTC Board: Arts & Attractions; Food & Beverage (resignation); and At Large. The Coastal Large Lodging seat was filled by election held by the County Treasurer-Tax-Collector. There was one applicant for the BID Advisory Board.

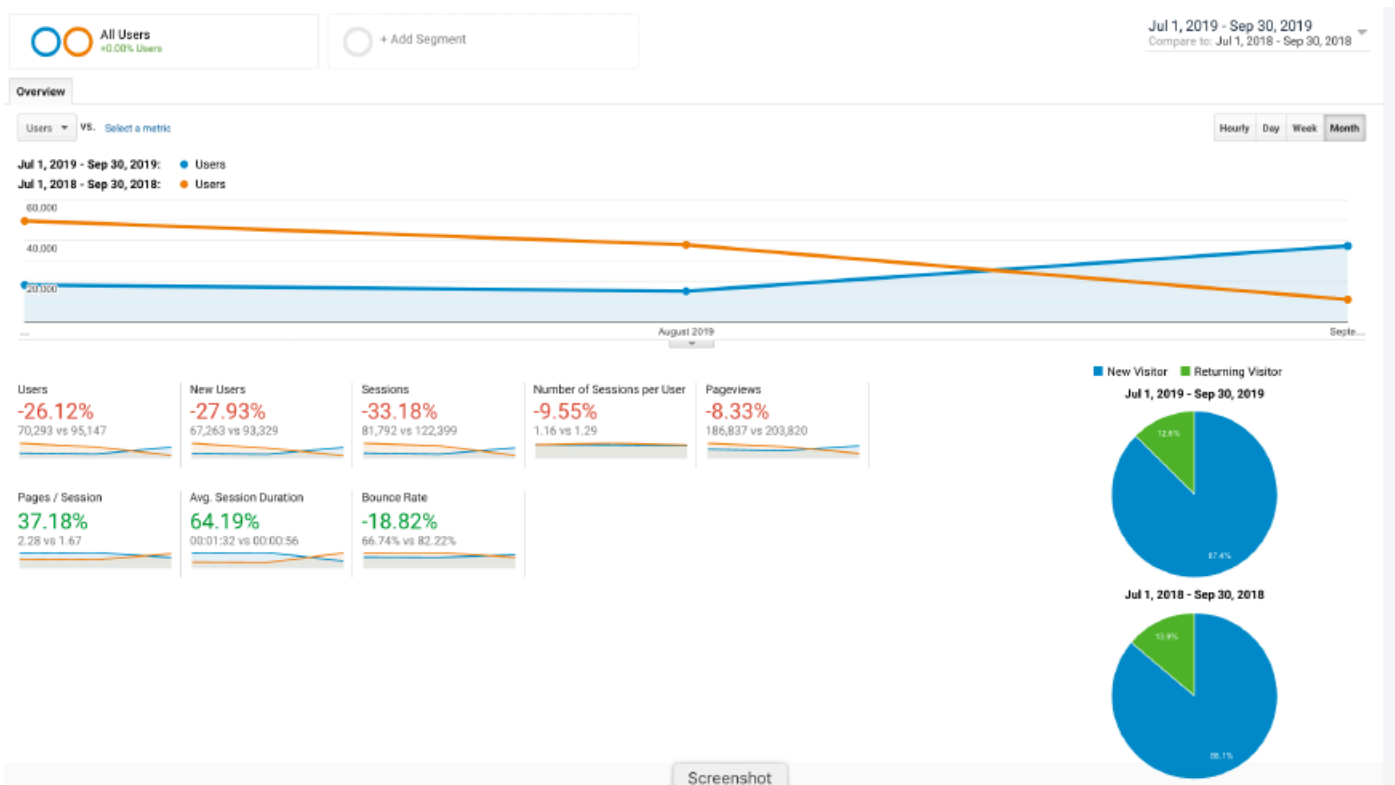
INITIATIVE: Foster collaboration and countywide alignment by creating and developing the “go to” website for all tourism stakeholders.

Marketing efforts began in earnest on September 9, 2019 with the launch of the digital campaign. Year over year comparisons are unavailable as the prior fiscal year’s marketing campaign did not begin until December 2018.

A review of Google Analytics for the quarter reveals:

- Q1 2019/20 visitors dropped for the first time due to a 10-week hiatus in media campaign
- Traffic dropped by 26%
- However, even with a 10 week hiatus and 26% less traffic to the site, business listing pageviews are up 40% over same quarter last year: 28,326 pageviews v. 20,223 in Q1 2018.
- Most traffic is from Northern California, San Francisco Bay Area and Sacramento. International traffic was reduced due to media hiatus
- Demographics are shifting to targets 25—44 years old

GROWTH SLOWS DUE TO MEDIA HIATUS



A review of sources of traffic shows that organic search lift from advertising is increasing (15.98%). However, Referral traffic is down significantly, partially accounting for the overall drop in visitors.

Top site content i.e., getting the most eyes, continues to be Events, Bucket List, and MendoMoments.

Staff recommends a verbiage change to this Initiative: **Curate the “go-to” website for tourism in Mendocino County.**

INITIATIVE: Strengthen regional tourism relationships to leverage broader marketing opportunities

The DMM submits media content to Visit California that highlights unique aspects of Mendocino County. In September 2019, Visit California picked up and ran the DMM’s submission on luxury experiences: <https://media.visitcalifornia.com/story-inspiration/discover-story-ideas/california-redefines-luxury-with-epic-experiences>.

The ED continues to work with the Lake County Tourism Improvement District Steering Committee to implement the structure of their organization. A planned visit was replaced by the NCTC meeting described previously.

INITIATIVE: Proactively educate and communicate with all tourism stakeholders

As noted elsewhere in this report the PR team regularly communicates with tourism stakeholders sharing media coverage of the county and in Q1, the PR team sent three updates to stakeholders and partners with national coverage ranging from summer travel to maximizing assets and resources and luxury offerings. The DMM also shared PR hits and other news on the VMC Partners at Work Facebook group. In addition, the DMM ensures stakeholders receive any articles that result from media FAM visits.

VMC has received a proposal from the International Tourism Association regarding a Certified Tourism Ambassador program for Mendocino County. The proposal will be put before the VMC Board of Directors at their December 2019 meeting.

IMPERATIVE: Raise awareness of the Mendocino County experience

- **OBJECTIVE: Year-over-year increase in Mendocino County awareness score**

Two significant elements of the Media Matters Worldwide media campaign (launched December 2018) were Nielsen and Facebook brand awareness studies. Both studies ran to the end of the campaign on June 30, 2019.

Nielsen Study:

- Programmatic advertising influenced users to visit the county at a 5.7ppt lift: twice the Facebook travel norm (visit intent).
- Lift in “definitely will visit” took off in May 2019 when high impact programmatic media picked up.
- Users reached 5 to 9 times by programmatic media had the highest lift.

Facebook Study:

- The Facebook brand awareness study showed paid Facebook advertising drove twice the travel norm in brand awareness and visit intent.

Social media also plays a critical role in creating and raising brand awareness. This quarter we started tracking

IG impressions so those figures will appear on future reports.

- OBJECTIVE: Year-over-year increases in impressions and ad equivalency**

Social Media Results YOY Q1 2018 v 2019					
	FACEBOOK			INSTAGRAM	
	FY 2018 Q1	FY 2019 Q1		FY 2018 Q1	FY 2019 Q1
Impressions	472,462	2,012,224 (1,754,079 Paid / 252,755 Organic+Viral)	Likes Received	13,645	17,044
Engagement	14,056	57,859	Comments	229	250
Link Clicks	938	18,999	Hashtags / Mentions		4,024
Posts	32	30	Posts	30	30
Impressions/Post	14,764	8,425	Likes/Post	455	586
Engagements/Post	439	1,929	Comments/Post	7.6	8.3
Fan Base	57,283	58,998	Followers	14,356	15,628
			Impressions		1,086,774

The first quarter of the fiscal year stacks up favorably against the same time period in 2018. The PR team was pleased to host writers for publications such as the *Robb Report* and *Departures* magazine, the imprint for American Express Platinum card holders. In the table below, the large number of hits in August 2018 was due to Mendocino Complex fire reportage.

- OBJECTIVE: Year-over-year increase in experience perception score on in-market visitor survey**

YOY PR Results for Q1										
Year	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
	Hits		Ad Equivalency		Impressions		Releases		FAM Visits	
July	69	44	\$11,488,099.40	\$11,259,602.00	90,052,900	101,717,546	1	0	3	5
August	320	46	\$9,426,467.08	\$49,753,433.00	139,341,458	224,672,826	3	1	1	0
September	70	37	\$3,434,070.24	\$16,614,838.00	118,981,190	74,268,572	2	1	8	6
YOY Total	437	127	\$24,348,636.72	\$77,627,873.00	348,375,548	400,658,944	6	2	13	11
2018 Goals		300		\$6.6 million		150 million		11		18

VMC received a proposal for an extensive in-county awareness study from SMG Consultants' principal Carl Ribaud. This proposal will go before the Visitor Services Committee at its next scheduled meeting in December 2019.

INITIATIVE: Increase Mendocino County brand awareness and positive perception

VMC worked with MMWW and TheorySF to launch a new digital marketing campaign on September 9, 2019. The results to the end of the quarter are described elsewhere in this report.

In conjunction with the media campaign, in addition to the Facebook brand study, MMWW is running another brand awareness study, this time with Survata (instead of Nielsen). Both Survata Ad Measurement and Nielsen Brand Effects use a test / control methodology where two separate but similar groups of individuals are asked the same question(s) about awareness and visit intent for Mendocino County and nearby competing destinations (e.g., Big Sur, Napa, Tahoe, etc.). One of the major differences with the Survata methodology is that it measures response on mobile and desktop while Nielsen is desktop only.

VMC staff attended Bark in the Park in San Jose on September 21, 2019. They collected 543 email sign-ups using iPads and a direct link to MailChimp and gave out 640+ orange bags

INITIATIVE: Work with partners to develop, promote and grow strong and beneficial tourism activities and events

Staff worked closely with Visit Willits (Chamber of Commerce), Willits Art Center and the Skunk Train to create an anchor event for Mushroom Feast 2019. The PRM also worked with Destination Hopland to plan and organize Hopland Harvest Days.

INITIATIVE: Explore our options to influence & shape potential cannabis tourism

On September 9, 2019, the ED and DMM attended the Mendocino Cannabis Alliance town hall event in Willits that explored the proposed Mendocino Appellations Project. Flow Kana teamed up with Emerald Farm Tours to create a weekend of cannabis and non-cannabis-related events and activities for the first weekend of Mushroom Feast Mendocino. The ED spoke on a panel at a California Cannabis Tourism Association (CCTA) town hall meeting in Ukiah with regard to cannabis as an economic driver in Mendocino County. VMC is exploring the option of becoming a member of CCTA.

The ED worked with the president of Mendocino County Promotional Alliance (MCPA) to schedule and organize a meeting of their board of directors to officially transfer responsibility of cannabis promotion from MCPA to VMC.

Appendix 1

INTERNATIONAL VISITATION TO MENDOCINO COUNTY EXPRESSED VIA DATA FROM VISA VUE CALENDAR YEAR DATA

	Q1 2018		Q1 2019		Q2 2018		Q2 2019		Q3 2018		Q3 2019		Q4 2017		Q4 2018	
Total dollar amount charged	\$449,251		\$390,109		\$707,677		\$713,574		\$1,026,130		\$1,025,077		\$540,821		\$569,738	
Y/Y increase/decrease *	22.80%		-13.20%		4.20%		0.80%		-9.70%		-0.10%		-6.30%		5.30%	
How the money is spent **																
Lodging	\$200,000		\$100,000		\$300,000		\$200,000		\$400,000		\$300,000		\$200,000		\$200,000	
Restaurants	\$100,000		\$100,000		\$100,000		\$100,000		\$200,000		\$200,000		\$100,000		\$100,000	
Other ***	\$100,000+		\$100,000+		\$300,000+		\$300,000+		\$300,000+		\$300,000+		\$200,000+		\$200,000+	
Ranking by country																
1	Canada		Canada		Canada		Canada		Canada		Canada		Canada		Canada	
2	China		UK		Germany		Germany		Germany		Germany		UK		UK	
3	UK		China		UK		UK		UK		UK		France		Germany	
4	Germany		Germany		France		Australia		France		Australia		Germany		France	
5	Italy		France		Australia		China		Australia		France		Spain		Spain	
Other top 10 countries	France		Australia		China		Mexico		Switzerland		China		Australia		Australia	
	Australia		Mexico		Denmark		France		Denmark		Mexico		China		Mexico	
	Taiwan		New Zealand		Switzerland		Denmark		Italy		Switzerland		Mexico		China	
	Malaysia		Puerto Rico		Puerto Rico		Switzerland		Mexico		New Zealand		Italy		Switzerland	
	Singapore		Spain		Italy		New Zealand		China		Spain		Denmark		Denmark	

* YOY 2017 / 2016 figures are unavailable for verification purposes

** Numbers beyond the total, lodging, restaurants etc., are given in increments rather than exact amounts

*** "Other" includes Fuel, Food and Grocery, Retail, Discount stores, Home Improvement and Apparel;

**** Visa reports approximately 44% of credit card charges. Other credit card data is unavailable.

Appendix 2

FESTIVAL PARTICIPATION YOY			
2012 - 2019			
2019 mushroom (feast)		2019 crab	
Lodging 30		Lodging 34	
Events 41		Events 20	
Restaurants 24		Restaurants 26	
Drink 40		Drink 33	
Play 19	154	Play 16	129
2018 mushroom (feast)		2018 crab (feast)	
Lodging 31		Lodging 26	
Events 61		Events 19	
Restaurants 18		Restaurants 22	
Drink 37	147	Drink 45	112
2017 mushroom		2017 crab	
Lodging 25		Lodging 24	
Events 38		Events 16	
Restaurants 26		Restaurants 18	
Drink 51	140	Drink 38	96
2016 mushroom		2016 crab	
Lodging 25		Lodging 26	
Events 36		Events 20	
Restaurants 30		Restaurants 17	
Drink 43	134	Drink 36	99
2015 mushroom		2015 crab	
Lodging 23		Lodging 21	
Events 30		Events 21	
Restaurants 22		Restaurants 13	
Drink 43	118	Drink 42	97
2014 mushroom		2014 crab	
Lodging 29		Lodging 34	
Events 33		Events 17	
Restaurants 30		Restaurants 27	
Drink 38	130	Drink 47	125
2013 mushroom		2013 crab	
Lodging 32		Lodging 31	
Events 42		Events 76	
Restaurants 32		Restaurants 17	
Drink 44	150	Drink 36	160
2012 mushroom		2012 crab	
Lodging 29		Lodging 30	
Events 61		Events 64	
Restaurants 17		Restaurants 11	
Drink 37	144	Drink 35	140

Appendix 3

Glossary of Terms

This glossary is included to explain terms used in this plan and in other reports and documents issued by Visit Mendocino County. While staff and contractors are familiar with the terminology, some of the terms need a brief explanation.

Advertising equivalency	This dollar figure represents the amount of money it would take to purchase the equivalent in advertising space in a print publication or digital equivalent. The VMC PR team uses a 1:1 ratio unlike many PR firms who use a multiplier to boost numbers.
Impressions	The number of views a print or digital article is estimated to reach based on circulation and subscription data.
Media Placement	A story (print or digital) about an aspect of Mendocino County that arises from PR efforts.
Media Mission	A trip by the PR team to a particular market, e.g., Vancouver BC, to meet local journalists and writers and inspire visitation to and coverage of Mendocino County.
Releases	This can either refer to a press release or a “hot sheet,” which is distributed to the press and highlights new and upcoming businesses and openings in the county.
FAM	Familiarization tour or trip. Media FAMs involve members of the media who are vetted by the PR team prior to a visit. Sales FAMs apply to tour group operators who are visiting the county with the aim of including Mendocino in tour packages.
Millennials	The segment of the population born between the early and the mid-1990s to early 2000s. Also known as Generation Y, they are the children of baby boomers and older Gen Xers.
Gen-Xers	The population segment born between the early-to-mid 1960s and ending birth years ranging from the late 1970s to early 1980s. Children of the Baby Boomers.
Baby Boomers	Those born between the early-to-mid 1940s up to about 1964.
Content marketing	Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience — and, ultimately, to drive profitable customer action.
Google Analytics	A reporting tool provided by Google that can be used to analyze traffic, ad words, digital marketing campaigns, demographics, etc. for VisitMendocino.com.
Facebook Insights	A reporting tool for analyzing traffic, advertising campaigns, and other activities on Facebook.
Activity Provider	A person located in a tourist destination who provides a unique, local activity for a visitor to do while on vacation. Examples of such activities include kayaking, bike riding or arts and crafts, among others.
Free Independent Traveler (FIT)	A person or a couple that is not traveling with a group; usually references foreign travelers out on their own (Foreign Independent Traveler).

Inbound Tour Operator	Someone specializing in providing tours to overseas travelers to a destination, either operating the tour themselves or working through established partnerships with local suppliers.
Receptives	In effect, “middle men” between tour operators and hotel/lodging owners, chiefly in overseas markets. Receptives obtain contracts with hotels for booking arrangements and offer these to tour operators looking to satisfy tourist demand.
Search Engine Marketing	A marketing tactic using paid advertising services so that interested clients and customers can reach a business quicker and easier while searching online.
Block	A number of rooms, seats, or spaces reserved in advance, usually by wholesalers, tour operators, or receptive operators who intend to sell them as components of tour packages.
Conversion	Getting “heads in beds” or otherwise closing the sale. Differs from “hospitality.” Hospitality is being warm, friendly and helpful. Conversion is active selling.
Demand generators	Strategies and programs developed by DMOs and suppliers to generate destination demand. Examples include festivals, events, cultural tours, and consumer promotion.
Engagement	On Facebook (and other social media platforms), engagement is when people perform actions on your Page. They may like a post, click on a link, or comment on an image for example. With Facebook Insights, engagement is measured as the number of times a post is clicked, liked, shared, or commented on.
Reach	A measure of the range of influence of any content; it is the measurement of how content is spread across various social media channels. Think of it as the number of eyeballs a piece of content is getting. On Facebook, for example, “total reach” is the number of people that have seen a particular post.
Selected Key Industry Associations	
DMA West	Destination Marketing Associations West, a membership organization of visitor bureaus throughout the western United States.
Visit California	The tourism marketing agency for the state.
California Travel Association	Membership organization offering education and advocacy for state tourism operators.
U.S. Travel Association	National, non-profit organization representing and advocating for all components of the travel industry.
Destination International	Global association of travel industry agencies and groups, offering education and advocacy for members. Visit Mendocino holds a certification from the globally recognized Destination Marketing Accreditation Program (DMAP); this serves as a visible industry distinction that defines quality and performance standards in destination marketing and management.
Brand USA	Agency chiefly responsible for marketing the USA as a destination to the rest of the world.
North Coast Tourism Council	One of eight rural regions designated by Visit CA to encourage international tourism beyond the gateways. Mendocino County is one of the four counties in the Council.