

Mendocino County Resident & Visitor Profile & Perception Study Summary Presentation

For: Visit Mendocino County



January 2023

Background – Mendocino County and Tourism

- Mendocino County's rugged coastline and bucolic inland scenery, attracts visitors for relaxation, exploration, and outdoor recreation.
- Tourism is important to the region by generating taxes, supporting business and employment, and contributing to residents' quality of life.
- Two key tourism related issues have emerged:
 - *Peak travel, or "overtourism"* impacting the visitor experience and quality of life for local residents;
 - *COVID-19*, which essentially shut-down travel and tourism in 2020. Tourism is recovering but with a greatly changed visitor profile and set of priorities for destination stewardship.



Need for Research, Objectives, Sample

- As Mendocino County's official destination marketing organization, Visit Mendocino County wanted data and insight to address these interrelated questions for marketing and destination management:
 - How do County residents perceive how tourism may be impacting them?
 - Who are current visitors?
 - Where do visitor and resident perceptions about Mendocino County tourism intersect or diverge?
- The Travel Analytics Group (TAG) conducted an integrated market research study to develop resident and visitors *profiles* and *answers* to those and related questions.
- Based on the research findings, we also developed *strategy* to optimize the destination experience and its management in consideration and benefit of both residents and visitors.
- The resident respondent base was 593, sourced from community group database contacts who were emailed the survey.
- The non-local (residing outside Mendocino County) visitor respondent base was 3,544, sourced from Visit Mendocino County's email and website databases, who were emailed the survey.

Summary of Key Findings

Mendocino County Residents

Overview - Resident Survey

Resident Survey Objectives

1. Identify resident perspectives, including favorable and unfavorable perceptions of tourism.
2. Identify resident values on a variety of issues
3. Engage the local community in helping to address identified challenges
4. The research based data and the strategy will be used to help Visit Mendocino County favorably position, and market and manage the destination, to benefit both visitors and residents.

Summary of Key Findings – Residents (1)

Resident Tenure, Origin, Reasons for Locating in Mendocino County

- ▶ 62% of survey respondents have lived in Mendocino County for 20 or more years, while 8% have lived in Mendocino County for less than five years, thus most are long-term residents.
- ▶ Of those recently moving to Mendocino County, 75% came from California, 22% came from a state other than California, while 2% were from an international country.
- ▶ The two main reasons for moving to Mendocino County are wanting to live in a place with *more open space* by 40%, and for *retirement*, by 34%.

Summary of Key Findings – Residents (2)

Location in Mendocino County, Impact of Housing Prices

- ▶ Over half, or 53% live on the county's coast of which 49% are in North Coast (Albion to Westport) and 4% in South Coast.
- ▶ Another 34% live in South County (Redwood Valley to Hopland), with 7% in inland North County, and 6% in Anderson Valley.
- ▶ Most residents, 60% report not having been personally impacted by housing or rent prices in the last two years.
- ▶ However, while a quarter, or 26% have been negatively impacted, 13% have been positively impacted by housing prices.
 - ▶ More longer-term residents report being negatively effected by housing prices.

Summary of Key Findings – Residents (3)

Work Status and Local Activities

- ▶ As to current work status 31% indicate they are retired, 30% work full time and 27% are self-employed full or part time. Another 7% work part time with only 1% not working (excluding retirement).
- ▶ Among those working, 71% have one job, 21% have two jobs, with 8% holding three or more jobs.
- ▶ Mendocino County residents indicate being active, participating in a range of outdoor activities in the area including *viewing wildlife and wildflowers, hiking, stargazing and visiting the botanical gardens*. Residents also participate in *retail shopping, dining, entertainment, and attending festivals and special events*.

Summary of Key Findings – Residents (4)

Media

- ▶ For information on the area and activities, 37% of residents use newspapers, magazines or website articles, and 29% use Facebook.
- ▶ Another 12% rely on family and friend recommendations, with few using any other sources.

Tourism Related Perceptions

- ▶ Three-quarters or 75% of residents are aware of Visit Mendocino County, 17% are unaware, with 7% unsure.
- ▶ Their perspective on specified issues indicates agreement that tourism in Mendocino County:
 - ▷ *contributes to the region's economy, it betters shopping, dining and other amenities, visitor generated taxes benefit county residents and that overall, tourism's positive benefits outweigh any negative impacts to the county.*

Summary of Key Findings – Residents (5)

Resident Values

- ▶ Resident highest ratings about the county reflect *love of and being defined by the outdoors, preference for local versus chain restaurants, and support for craft breweries.*
- ▶ Their highest values focus on seeing themselves as *individualistic and self-reliant, and love for locally performed music and the entertainment.*
- ▶ Conversely, lowest agreement is that: the county is *changing for the better*, that residents *focus more on today than history*, and that the *county protects its environment.*

Resident Respondent Demographics

- 64% female
- Skewed older; 58% age 60+
- 70% hold college degree or higher
- 80% are home owners
- Nearly 70 are married
- 22% of residents have children at home; 73% are age 6 -18

Summary Observations -Residents

- Resident survey respondents embody preferences of being both outdoor oriented and having a keen interest in cultural activities found within the County.
- Residents are aware of Visit Mendocino County and of tourism.
 - They recognize the economic benefits and its tradeoffs that tourism brings to Mendocino County; overall *they see more positives than negatives*.
 - The high awareness of Visit Mendocino County creates an opportunity for the DMO to utilize its communication capabilities to further educate and inform visitors on key issues, behaviors and attitudes.
 - Thus, the DMO can bridge between residents and visitors to help achieve balance between the two.
- Residents indicate that the County may not be on the right track in terms of County planning and management regarding tourism, thus more efforts may be needed to improve that perception.

Summary of Key Findings

Mendocino County Visitors

Summary of Findings Visitors (1)

- ▶ The vast majority of survey respondents who visited Mendocino County are Californians, mainly from Northern California.
- ▶ Mendocino's coastal area was most visitors' main destination.
- ▶ Seasonality is well distributed; Spring and Summer are the most visited seasons, with just slightly fewer in Fall, with far fewer in Winter.
- ▶ Nearly 94% of visitors rate their experience in Mendocino County as *highly enjoyable*, and most like its *scenic beauty* and *beaches*.
- ▶ Mendocino County offers visitors *familiarity* and a *get-away place*, as well as being *uncrowded*, and its *outdoor activities* and *open spaces*.

Summary of Findings – Visitors (2)

- ▶ Two-thirds visited mainly for *pleasure/vacation*.
- ▶ While in the area they dined in restaurants, were sightseeing, engaged in outdoor recreation and shopped.
- ▶ Almost all, 97% stayed overnight in the County, and 8 in 10 stayed in hotel type lodging.
- ▶ 99% of visitors spent money in Mendocino, averaging \$494 per group per day.

Summary of Findings – Visitors (3)

- ▶ 90% were traveling with others on their trip, of which 60% were couples and 22% families. Groups averaged 2.8 persons.
- ▶ Respondents skewed older with a median age of 61.
- ▶ While 76% are married, 57% have no children at home.
- ▶ 65% of respondents are female and 34% are male.
- ▶ Visitors median annual household income is \$111,200; 55% report income of \$100,000+

Summary of Findings Visitors (4) - Perception Ratings

- ▶ When traveling visitors seek to *minimize environment impact* and want *authentic destination experiences*.
- ▶ Regarding Mendocino County tourism, visitors rate that tourism *contributes economic benefits* and *offers great amenities*.
- ▶ As a destination, visitors like Mendocino County's *great outdoors*, *local restaurants* and its *protection of the environment*.

Summary Observations - Visitors

- ▶ The high share of visitors from Northern California, suggests the opportunity to broaden reach to Central California and Southern Oregon, especially to potential visitors residing in non-coastal areas.
- ▶ Related to that is the high share of visitors who like the area for their *familiarity* with it. As a result, they use past experience more than media/resources for trip planning.
 - ▷ Those residing farther away who have not visited before are more likely to use media with messaging generated by Visit Mendocino County.
- ▶ Visitors want “authentic experiences;” often meaning places area residents frequent. The area’s music and arts can offer visitors these experiences.
- ▶ Visitors are thinking about and concerned with environment protection and minimizing negative tourism impacts.
 - ▷ Related messaging may encourage and attract like-minded visitors to Mendocino County.

Mendocino County Residents

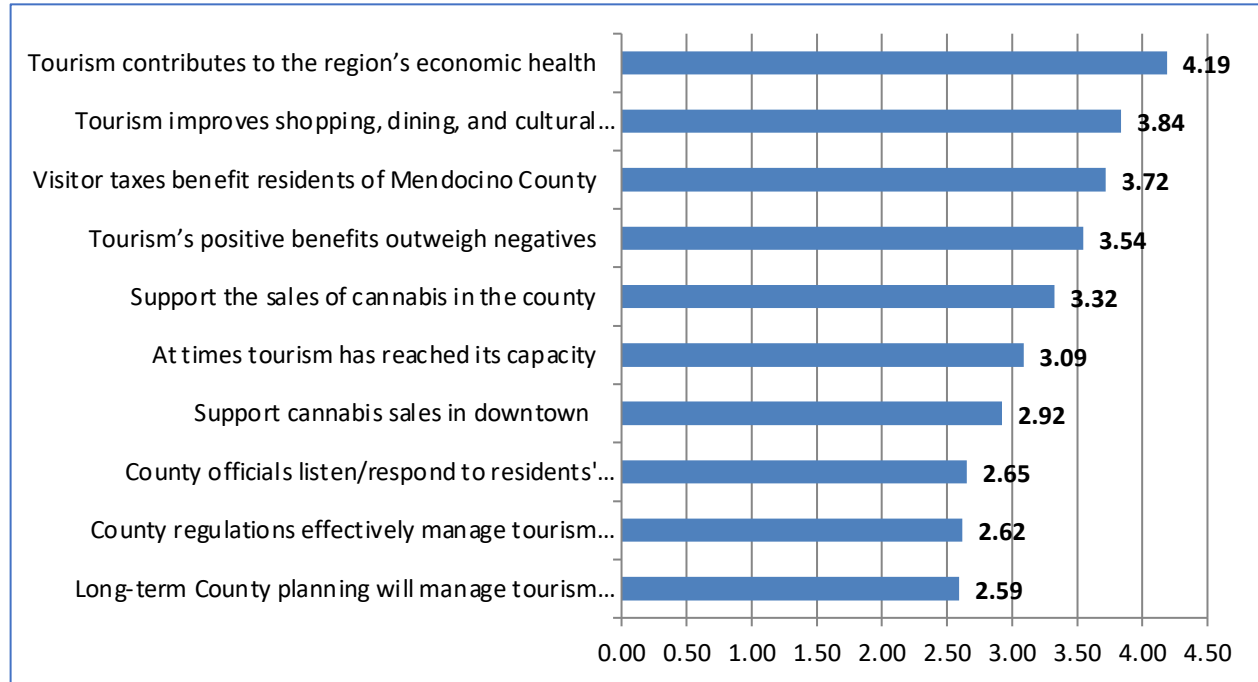
Perspectives & Issues Ratings

Residents Agree on Tourism's Economic & Amenities Contributions

Resident Agreement with Statements Re: Mendocino County Tourism - Means
(Means 5 = strongly agree to 1 = strongly disagree)

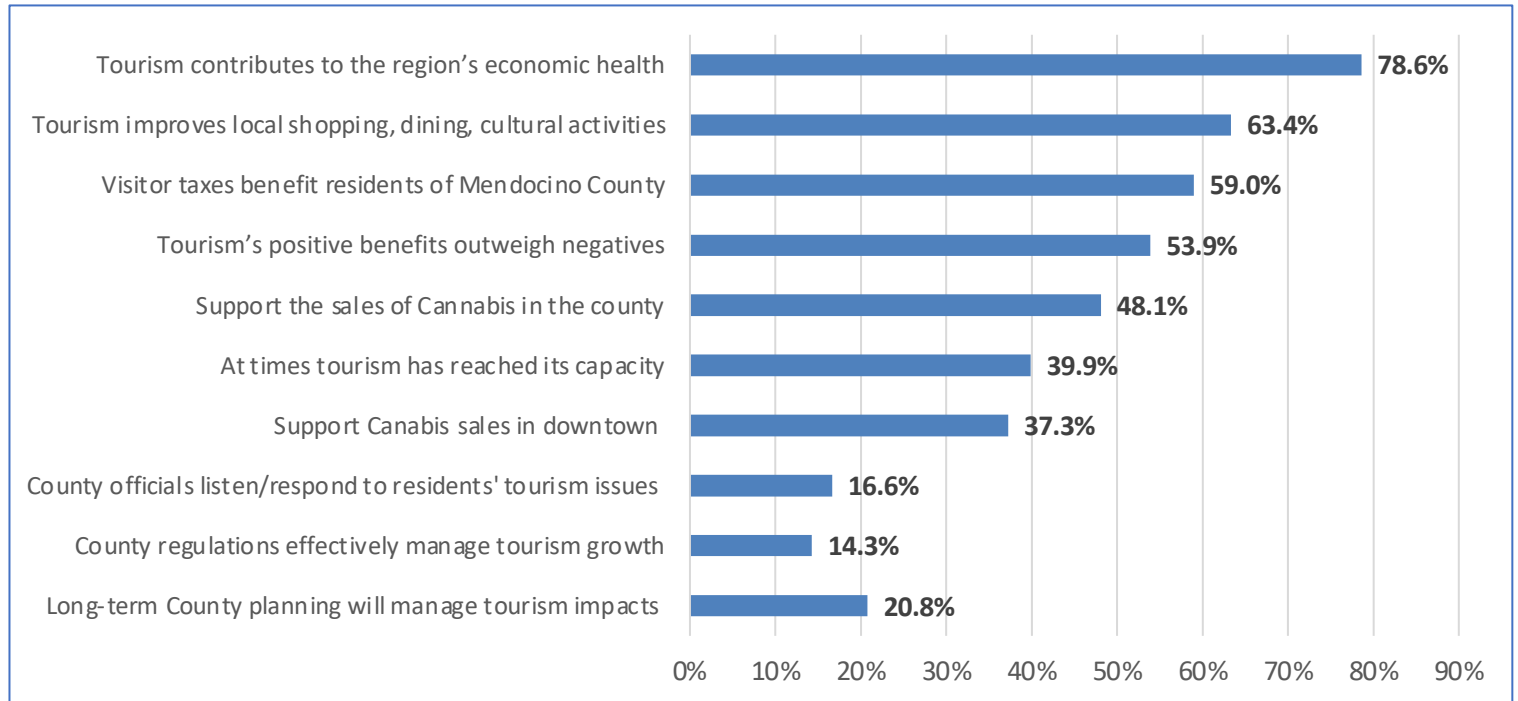
Residents indicates a high level of agreement that tourism plays an important role in the regional economy.

Residents indicate lower agreement as to the role and effectiveness of the County in managing tourism.



Resident Statement Agreement

Resident Agreement with Statements Re: Mendocino County Tourism - Percentage (top two ratings)

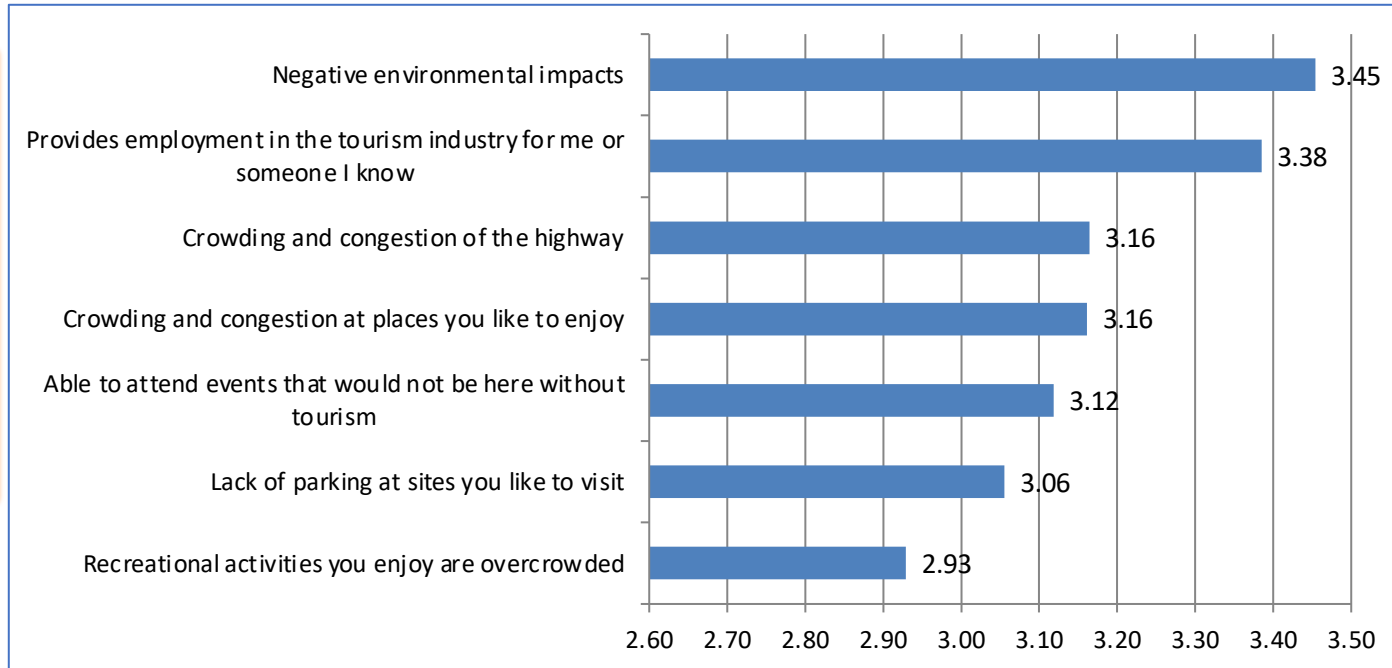


Residents See Some Negative Impacts from Tourism

Extent Personally Impacted by Tourism in Mendocino County 5 = Strongly Impacted – 1 = Strongly not Impacted

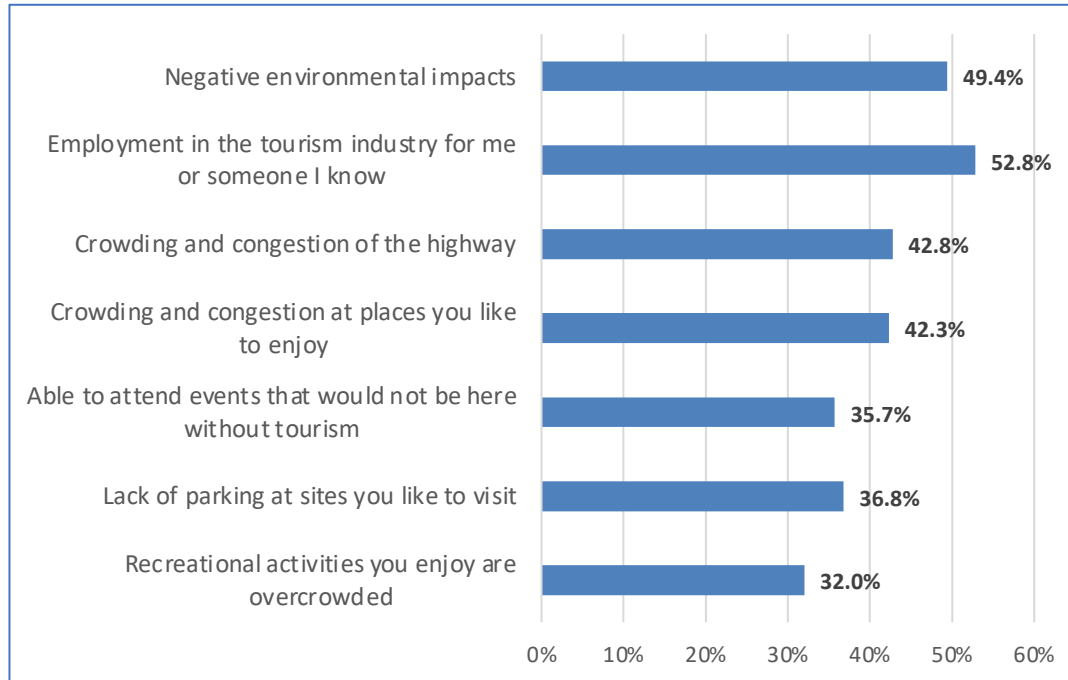
Residents agree as to some negative environmental impacts, rating it 3.45 (out of 5) and some crowding, rating both of those items at 3.16.

At the same time they or someone they know is employed in tourism, rating it 3.38.



Half of Residents Employed in Tourism, Half of Residents Experienced Environmental Impacts

**Extent *Personally* Impacted by Tourism in Mendocino County- Percentages
(top two box: 5 = Strongly Impacted – 1 = Strongly Not Impacted)**

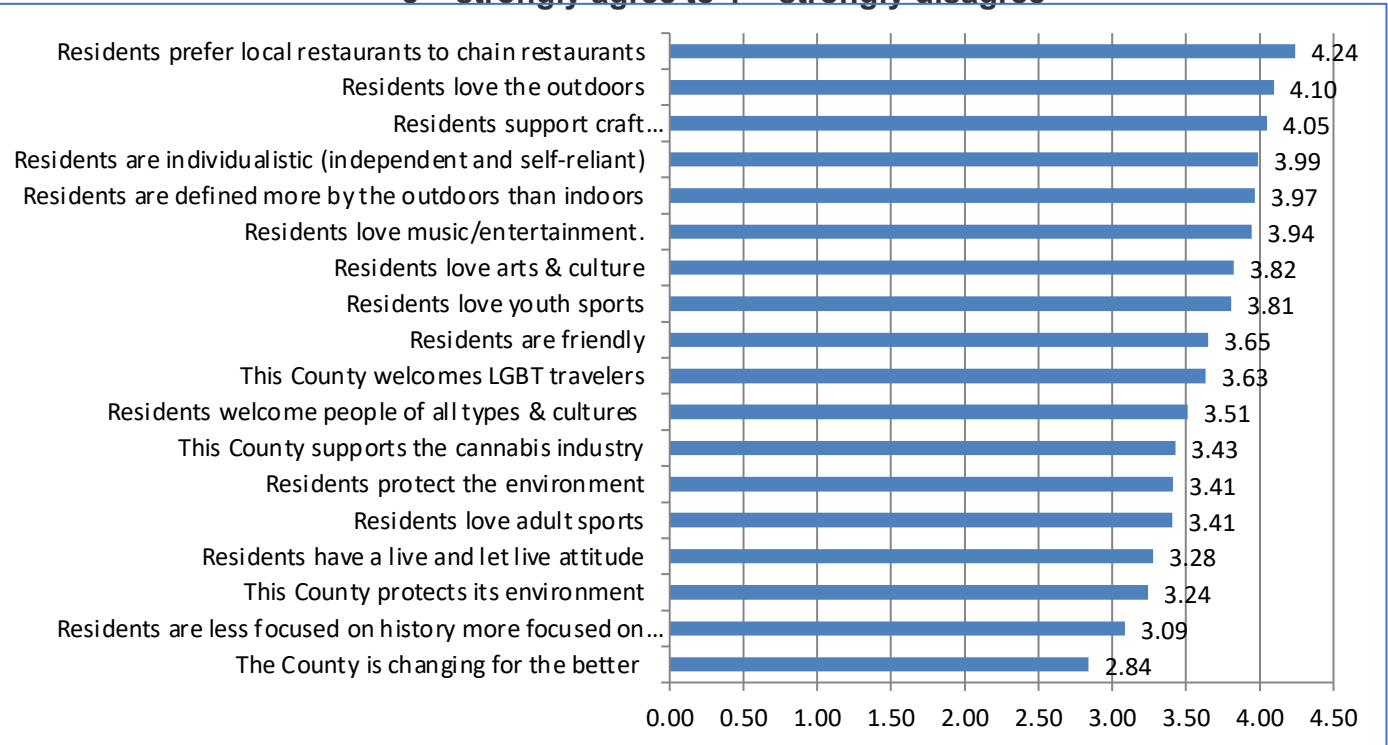


Residents Value Much About the Area; Lower Agreement that the Area is Improving

Agreement with Statements about Mendocino County 5 = strongly agree to 1 = strongly disagree

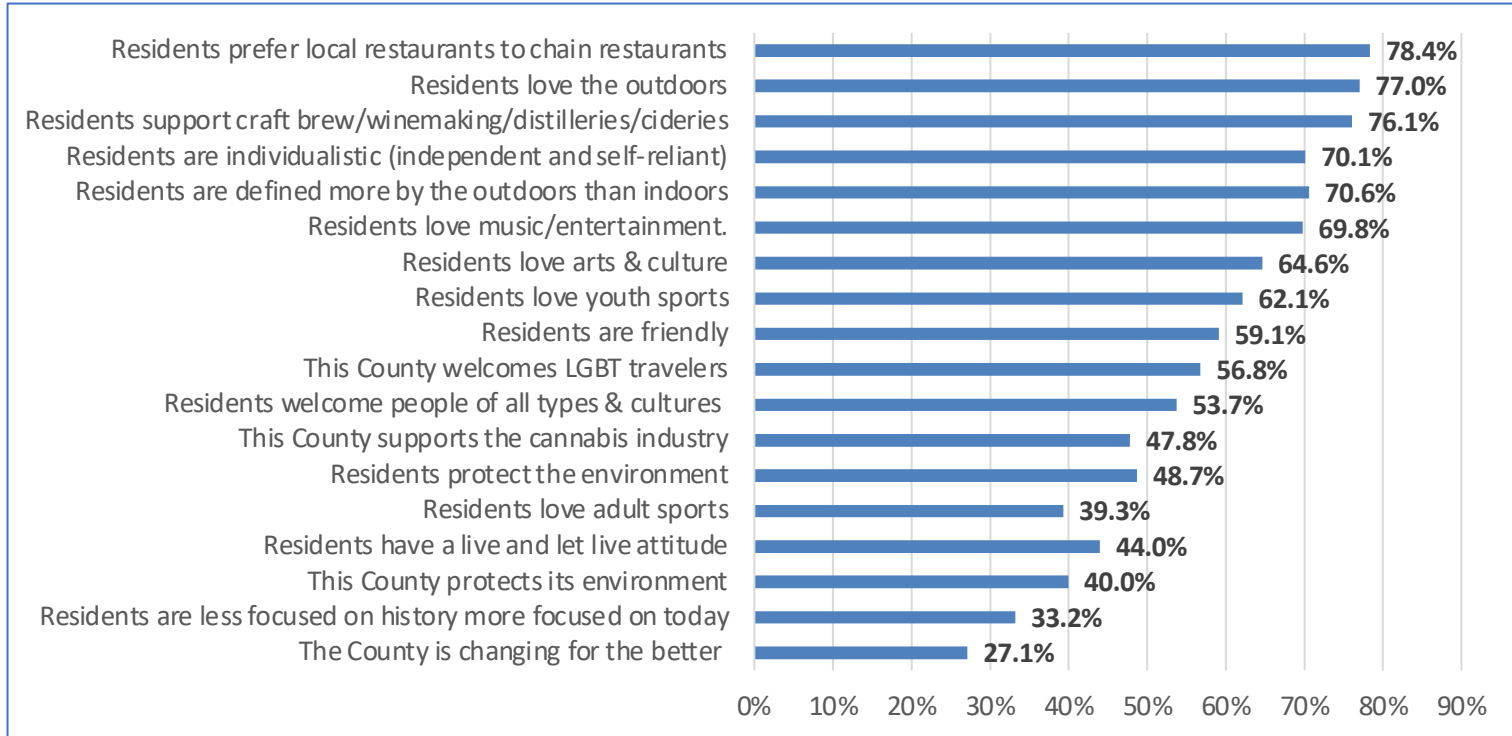
Residents value, local versus chain eateries, outdoors, individualism local crafters, music/entertainment.

Conversely, perception is lowest that the County is changing for the better, rated at 2.84.



Residents Most Agreement: Prefer Local Restaurants, the Outdoors, Craft Industries, Individualism

Agreement with Statements (percentage rating 5 (highest) + 4 agreeing)



Combined Comparisons

Mendocino County Resident and Visitor
Perceptions and Values

Resident and Visitor Comparison

- ▶ One of the main study objectives is to compare and contrast resident and visitor perspectives on a range of values and perceptions regarding Mendocino County tourism and as a visitor destination.
- ▶ This comparison provides valuable insight into both segments, applicable to marketing and destination management.
- ▶ This section discusses the results of this exploration and strategy implications.

Residents and Visitors Agree on Various Aspects of Tourism and Mendocino County

Most commonality between visitors and residents:

- ▷ Tourism *contributes to the region's economy*, with 79% of residents and 81% of visitors in agreement *
- ▷ Preference for *local over chain restaurants*, by 88% of residents and 78% of visitors
- ▷ The County offers/resident love the region's *arts and culture*, by 65% of residents and 59% of visitors.
- ▷ The County offers/that tourism improves *shopping, dining and cultural amenities* by 71% of visitors and 63% of residents
- ▷ Tourism in Mendocino County *positives outweigh negatives*, by 56% of visitors and 54% of residents
- ▷ *Support of cannabis sales* in the county by 51% of visitors and 48% of residents

* “agreement” refers to the percentage rating each item a 5 or a 4 on a scale where 5 = Most Agree.

Residents and Visitors are Farther Apart on Some Issues

- ▶ Nearly 94% of visitors versus 41% of residents agree * *the area has a great environment/that the county is protecting the environment.*
- ▶ About 57% of residents versus 46% of visitors agree *the county is welcoming of LGBTQ travelers.*
- ▶ While 70% of residents agree they *love music and entertainment* only 36% of visitor agree that *the county offers much music.*
- ▶ As well, 40% of residents versus 21% of visitors agree that *tourism in the county has reached its capacity.*

* “agree” refers to the percentage rating each item 5 or 4 on a scale where 5 = Most Agree.

Comparisons (Top Two Box Ratings)

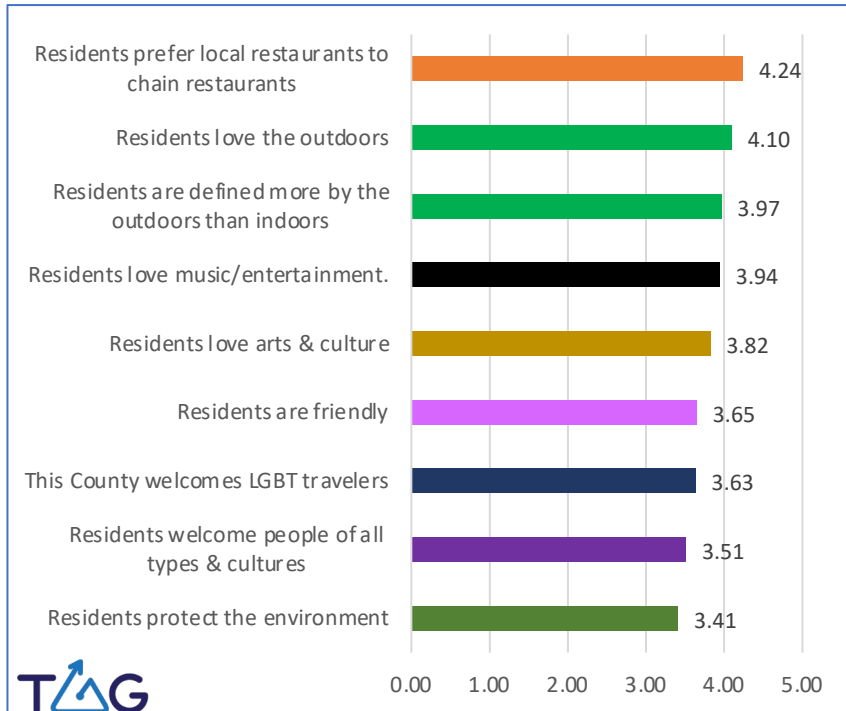
Agreement with Statements
(percentage rating 5 + 4)

	Visitors	Residents
Resident and Visitor Alignment		
Tourism in Mendocino County contributes to the region's economic health	80.5%	78.7%
Residents Prefer local restaurants/Offer more local restaurants	87.5%	78.4%
Offers Great Arts & Culture/Loves Arts & Culture	59.0%	64.6%
Mendocino offers great/improves shopping, dining and cultural amenities	70.5%	63.4%
Overall tourism's positive benefits outweigh the negative benefits	55.6%	53.9%
Support the sale of cannabis in the county	50.7%	48.1%
Resident and Visitor Gaps		
Has a great environment/County protects the outdoor environment	93.5%	40.6%
Welcomes LBGTQ Travelers	46.0%	56.8%
Residents love music & entertainment/ Offers much music & entertainment	36.3%	69.8%
I think at times tourism in Mendocino County has reached its capacity	20.7%	39.9%

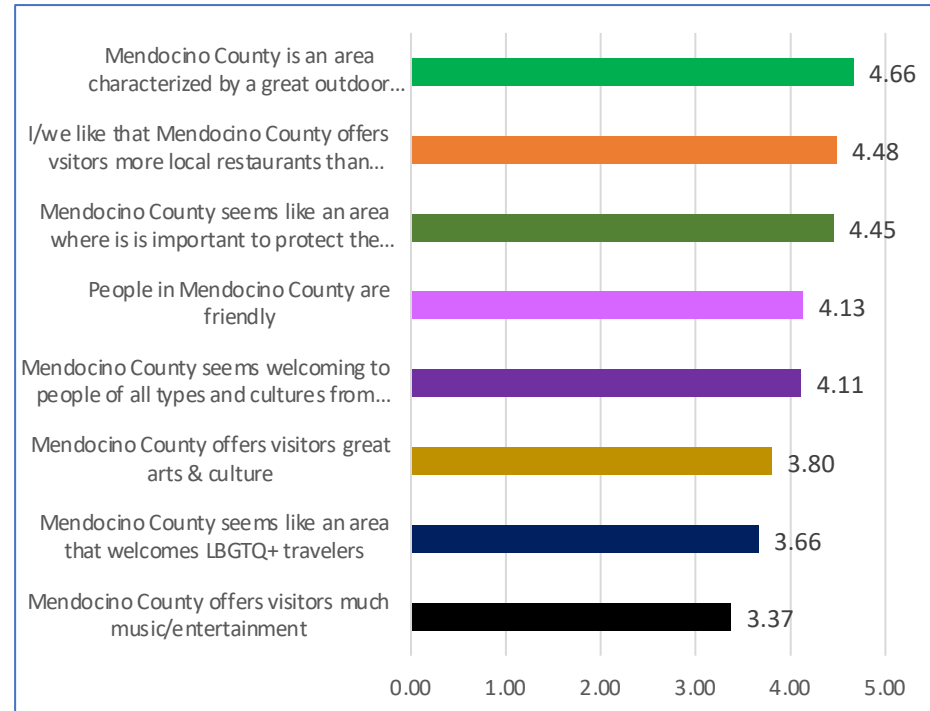
Visitors Like: Area's Outdoors, Local Eateries, Environment Protection

Residents Like: Local Eateries, Outdoors, Craft Industries

Resident Agreement Means (out of 5)

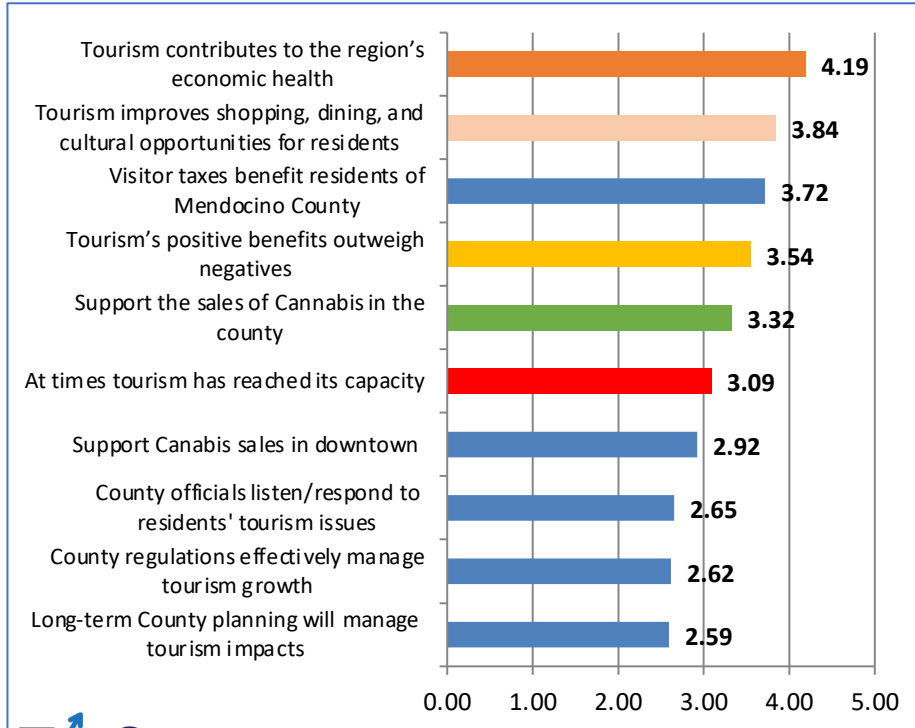


Visitor Agreement Means (out of 5)

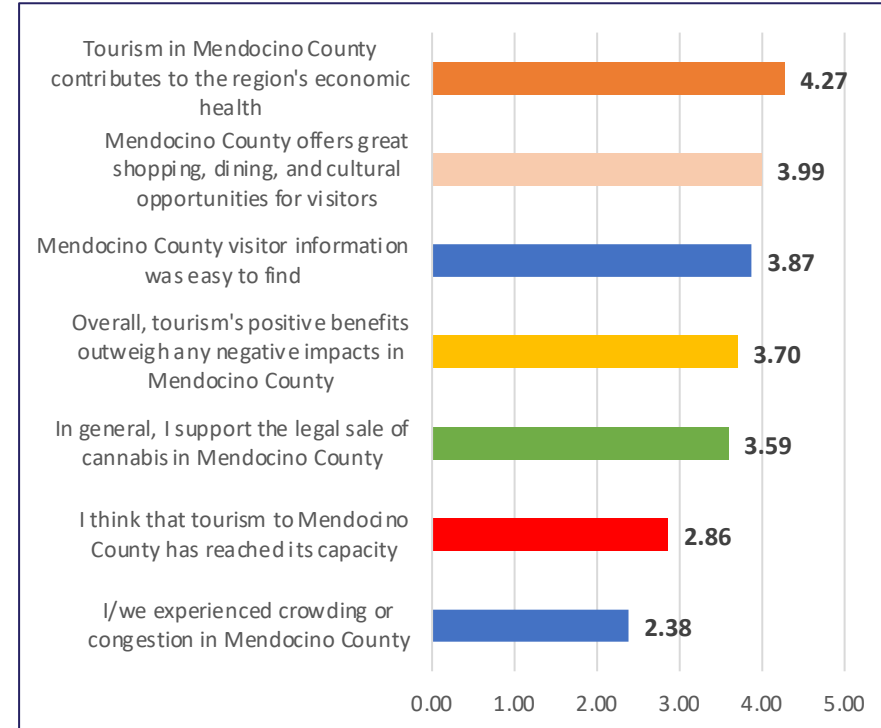


Visitors & Residents Agree on Tourism Benefits to & Great Amenities in Mendocino County

Resident Ratings (out of 5)



Visitor Ratings (out of 5)



Strategy Implications

Strategy Implications – Rise of the Resident Voice

- ▶ The emergence of the *residents' voice* is a new dynamic affecting destination management.
 - ▷ They are expressing their concerns about destination visitation, traffic, crowding, environmental impacts, how visitor revenue and taxes are allocated, and more.
 - ▷ They expect their concerns to be heard and addressed by destination management and local government.
- ▶ Destination marketing organizations are challenged to, and may be held accountable for considering and balancing resident perspectives and the destination's tourism economic impacts.



Strategy Implications Overall

- ▶ From a strategy standpoint it is prudent to develop a resident-centric strategy. What does that mean given the capabilities and mission of the DMO?
- ▶ There are two elements when considering resident concerns: the tourism economy and efforts to manage visitors and their impacts.
 - ▷ The Tourism Economy:
 - ▶ Continue messaging to educate/remind engage residents about tourism's benefits, beyond the typical messaging of providing jobs taxes and local services.
 - ▶ This messaging should connect tourism benefits to residents' daily lives to make the benefits visible to residents, for example, by allocating more visitor generated revenue to resident/community needs, events or services.
 - ▷ Visitor Local Engagement
 - ▶ The DMO can encourage visitors to contribute to important causes and organizations in the county that have some link to visitors, such as environmental, cultural and recreational organizations, etc. The key is to make a more direct connection between visitors and residents.

Strategy Implications Residents

- ▶ Management - While the DMO does not have the capacity, capability, or the mission to manage all tourism impacts, it can effectively communicate to potential visitors to help educate and encourage them to travel responsibly while in Mendocino County.
 - ▶ When such messaging is deployed to visitors, residents need to become aware of these efforts.
 - ▶ Increase tourism promotion and marketing efforts toward:
 - ▶ visitor education about the area, including best times and areas of the County to visit to avoid negative impacts and overcrowding.
 - ▶ resident education that highlights DMO messaging and promotion reflecting DMO's efforts in mitigating overtourism.

A Resident-Centric Approach

► **Bottom-Up Resident Strategic Platform:**

1. Be Bold and Unapologetic.
2. Develop a voice – Adjust enabling messages to be stronger, more direct.
3. Invite and **direct** visitors to join residents to be part of the solution – to create a culture that cares. Include visitors in the messaging.
4. Build a Sense of Place and Belonging.
5. Be inclusive of all residents: new residents; disengaged; remote workers; 2nd homeowners
6. Recognize and include all visitors – “Welcome to Mendocino County” You’re invited to help protect this place.” Recognize and invite visitors as Guardians, Protectors, Guests, Engagers.

A Resident Centric Communications Strategy

- **WELCOME TO Mendocino County**
- Building the foundation for an authentic & sustainable strategy with messages, images, branded logos, etc.
 - Include in promotion and educational materials, on merchandise, websites, communications, etc.
- When resonating with and creating ownership among residents, it will help build local pride, and support, among friends, family members, co-workers, and customers.
 - When residents own it, visitors will be able to feel and be part of it.
- ***Creating a Culture that Cares* means *Sharing our Culture that Cares.***

Visitors' Strategy Implications

- ▶ Optimally market to visitors about the importance of minimizing their impact both when *planning* to visit and when in the destination.
- ▶ Create tools that local visitor serving business can use to help educate visitors:
 - ▶ a series of on-line and social media short videos (60-90 seconds) on such topics as: Care for the Environment, Stay on the Trail, etc.
 - ▶ A series of on-site signage on these topics to display in windows of local visitor serving businesses.
- ▶ As local lodging is a key point of visitor contact, create tools for visitors at check-in such as a small Visitor Guide on the environment and responsible travel.

Thank You!!!

Questions

Comments

