



FORT BRAGG
On California's Spectacular Mendocino Coast

Marketing Research -Tourism

**Final Report
Prepared for:
City of Fort Bragg**

3.0



Ideas and solutions for your competitive world

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Executive Summary

Current marketing promotion efforts for Fort Bragg as a tourism destination have primarily been conducted by the Mendocino County Tourism Commission and the City of Fort Bragg's Tourism Committee. While the Mendocino Tourism Commission promotes the entire county and is able to generate revenue, taxes and employment county-wide, including Fort Bragg, the City of Fort Bragg has complimented the effort by contracting with the local Chamber of Commerce to market the city directly. Both are vital to promoting the area.

The Mendocino County Tourism Commission promotes tourism through a county-wide Tourism Business Improvement District (TBID), whereas the City of Fort Bragg provides 4% of transient occupancy tax plus an administrative allocation (approximately \$82,000 in fiscal year 2016/2017) for promotions. The City currently contracts with the Chamber of Commerce to administer City promotions through oversight of the City promotion committee known as Visit Fort Bragg.

With the passage of Measure AA, approximately \$200,000 in additional funds are expected to be available to support tourism related projects and promotions.

Marketing Research

Overall, the marketing research can be broken down into four studies.

1. Mendocino County Email Database Survey

This survey was created and sent out to those individuals who provided an email address because of some interest in Mendocino County. 625 people responded and overall the results indicated a positive view of Fort Bragg.

2. Website Analysis

An in-depth review of the current Visit Fort Bragg website (www.Fortbragg.com) was conducted. Overall, the numbers are positive. Despite a modest budget, the website attracts 331,000 unique users over the past 12 months. Much of the focus is on Glass Beach suggesting strategies need to be developed to leverage this consumer search behavior.

3. Social Media Analysis

Facebook, Instagram, Twitter and YouTube were reviewed and while the budget is limited, the efforts have been positive. Developing additional content and maximizing the features of each platform will increase awareness of Fort Bragg and drive potential visitors to the area.

4. Fort Bragg Lodging Survey

A survey of those who have stayed in Fort Bragg was developed using the actual lodging database of overnight visitors from participating properties. 700 surveys were completed and overall the responses were positive and provide valuable insight into behaviors attitudes and perceptions of Fort Bragg.

Overall, the marketing research can be categorized to reflect the product/experience, the visitor, and the marketing efforts and by understanding these three elements they can be used to develop an effective marketing action plan. is key to developing an effective marketing plan.

It is important to remember that “structure follows strategy”. Therefore, it will be necessary to create a structure that can support the marketing plan. After careful review, SMG has determined that an organizational structure should be created that can effectively implement the marketing programs.

Administrative Structure

- Administrative oversight and support needs to be provided by the City of Fort Bragg to build basic organization systems and implement identified marketing programs. Ultimately, in the short term the city is responsible for implementing and funding of all the marketing programs.
- Eventually, the short-term structure will need to be reviewed and potentially be restructured to effectively compete. We recommend that the city evaluate its effectiveness at implementing tourism marketing plans and consider developing a freestanding Destination Marketing Organization (DMO) that would better support the marketing efforts of Fort Bragg. The free standing DMO set up properly will allow the organization to be more singularly focused and responsive to a rapidly changing marketplace.

Project Overview

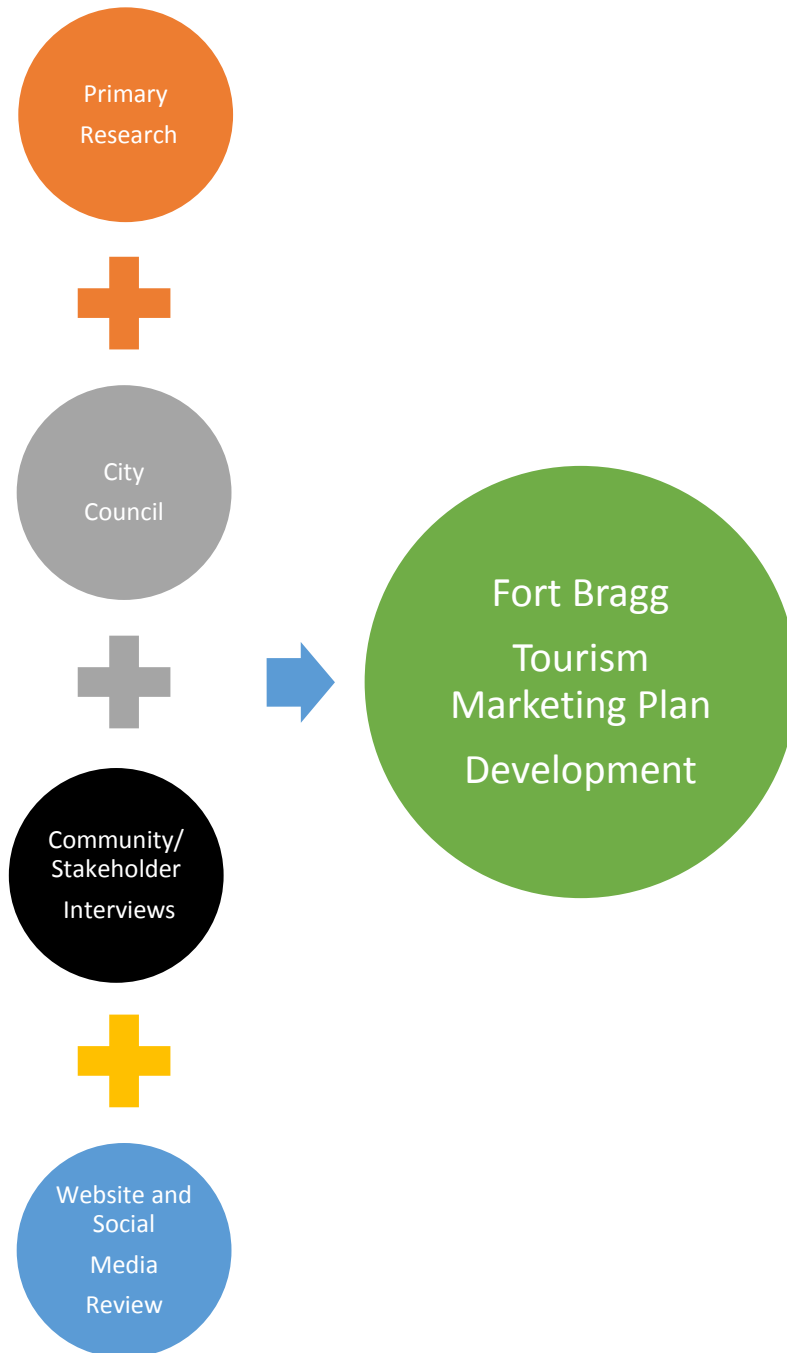
The City of Fort Bragg is a coastal city along State Route 1 in Mendocino County. The city offers access to a variety of recreation opportunities, a unique downtown, community based special events and incredible views of the Pacific Ocean. Fort Bragg has historically been marketed both as its own destination and as part of Mendocino County. In an effort to increase its presence as a tourism destination in the highly competitive California market by developing a strategic marketing plan the city has retained SMG Consulting to implement several research projects to help inform those future marketing efforts. To that end, SMG Consulting has implemented the following tasks:

- 1. Reviewed existing visitor research and programs to develop a visitor profile.**
 - a. SMG Consulting met with the Mendocino Coast Chamber of Commerce and reviewed their current marketing programs.
- 2. Community Workshop/Interviews-** implemented several on sight community interviews to gain local insights regarding tourism promotion efforts in Fort Bragg. For a list of those who participated, see the Appendix Section of this report.
- 3. Implemented two separate primary research projects:**
 - a. Visit Mendocino County Database Survey - conducted a survey, in conjunction with Visit Mendocino County, of their database to gain an understanding and perspective at a county level regarding visitors' experiences and motivations for visiting.
 - b. Fort Bragg Overnight Visitor Survey- developed a survey using email database information from participating lodging properties to gain an understanding of visitors that spent the night in Fort Bragg.

Both studies should inform the marketing action plan.

- 4. Website and Social Media ROI-** gained an understanding of the effectiveness of the Fort Bragg.com website and social media platforms and made recommendations.
- 5. Developed a Recommend Fort Bragg Marketing Action Plan** designed to inform and guide Fort Bragg Tourism Marketing efforts.

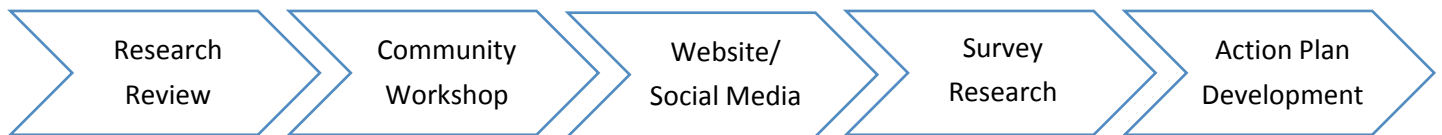
These combined research elements serve as a basis for the development of a Recommend Fort Bragg Tourism Marketing Plan.



Scope of Work

The scope of work included several important steps.

Scope of work



Phase 1 – Review of Existing Research

- SMG reviewed existing research conducted for Mendocino County and available information from Visit California.
- SMG reviewed the community, including the downtown, local lodging and recreation assets.

Phase 2 – Survey Research

- SMG developed two online surveys, with input from key stakeholders, targeted to county visitors and overnight visitors to Fort Bragg.

Phase 3 – Website/Social Media

- SMG reviewed existing website and social media with a goal of recommending implementation steps to increase users.

Phase 4 – Community Workshop/Interviews

- SMG implemented a series of interviews and stakeholder meetings.

Phase 5 – Action Plan Development

- Develop a Fort Bragg Marketing Action Plan

Part I: Situation Analysis

Mendocino County Tourism Promotion

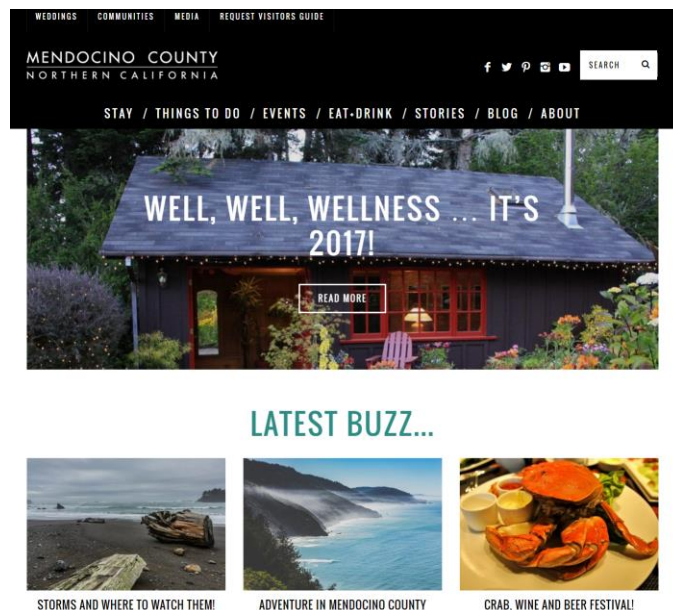
Mendocino County's primary tourism marketing promotion efforts have been conducted by the Mendocino County Tourism Commission. This organization has been charged with promoting the entire county (including Fort Bragg) to attract visitors to the county to generate revenues, taxes and employment. To that end, the organization has dedicated funding from Mendocino County and a county-wide Tourism Business Improvement District (TBID).

The organization is involved in a wide variety of tourism marketing activities including advertising, an website, public relations, promotions, social media and special events. All efforts are designed to create awareness and influence potential visitors to visit Mendocino County. The Mendocino County Tourism Commission promotes the county by positioning its promotion to focus on the following tourism assets:

- The Mendocino County Wine Industry, including tasting and the related experience;
- The iconic California Redwoods;
- The wilderness recreation experiences; and
- The Mendocino County Coast and the incredible views it offers.

The Commission focuses on these county-wide assets to influence and attract potential visitors to Mendocino County instead of competitor destinations. A screen capture of the homepage of the commission is illustrated in Exhibit 1.

Exhibit 1: Mendocino County Tourism Website



As part of the county-wide Tourism Business Improvement District (TBID), Fort Bragg lodging properties contribute significant funding to the Commission and seek benefit from their efforts.

Fort Bragg Tourism Promotion

To compliment county-wide tourism promotions, the City of Fort Bragg directly supports efforts to promote Fort Bragg as a tourism destination. To this end, the City has contracted with the local Chamber of Commerce to administer specific marketing efforts designed to promote Fort Bragg. The City provided approximately \$82,000 in funding in fiscal year 2016-2017 to support three primary goals as follow (excluding administrative allocation of \$12,000).

Goal 1. Increase Transient Occupancy Tax (TOT) by promoting Fort Bragg as an overnight destination. These efforts include both online and offline promotions designed to create awareness and influence potential visitors to visit Fort Bragg.

FY 2016-17 Budget: \$55,000

Goal 2. Generate sales tax for Fort Bragg from visitors and residents by supporting the Fourth Of July Celebration and the Shop Fort Bragg program, both of which encourage local retail dining and shopping.

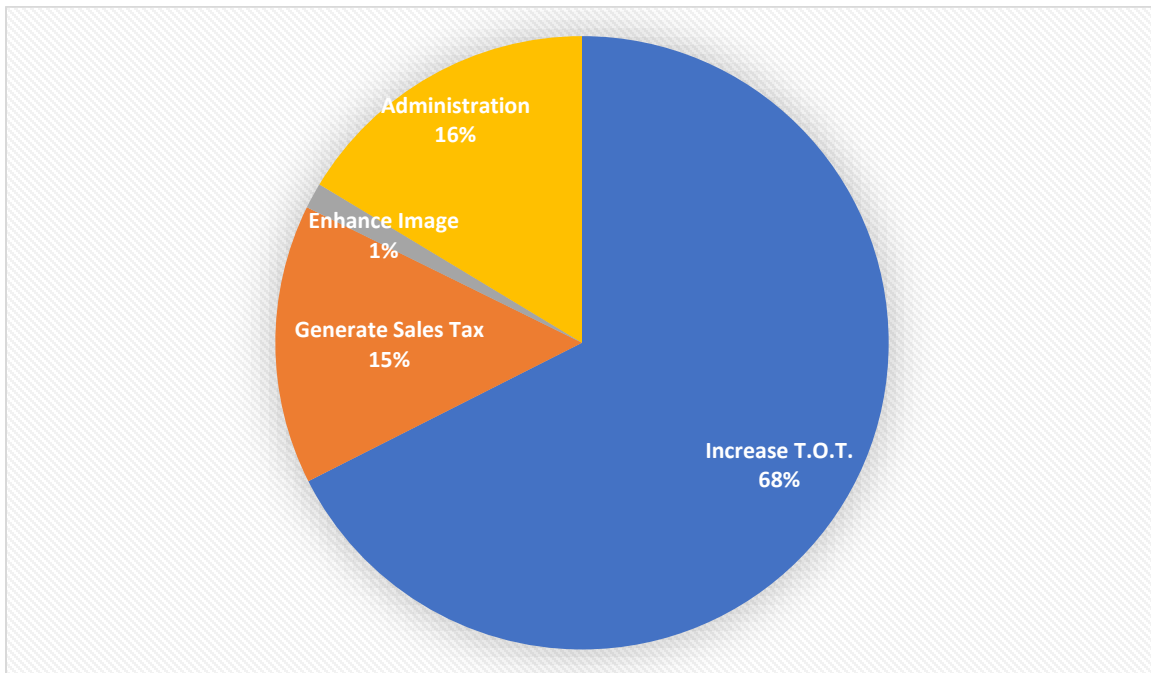
Budget: \$12,000

Goal 3. Enhance the image of Fort Bragg by supporting the American flag display and the California Coastal National Monument.

Budget: \$1,100

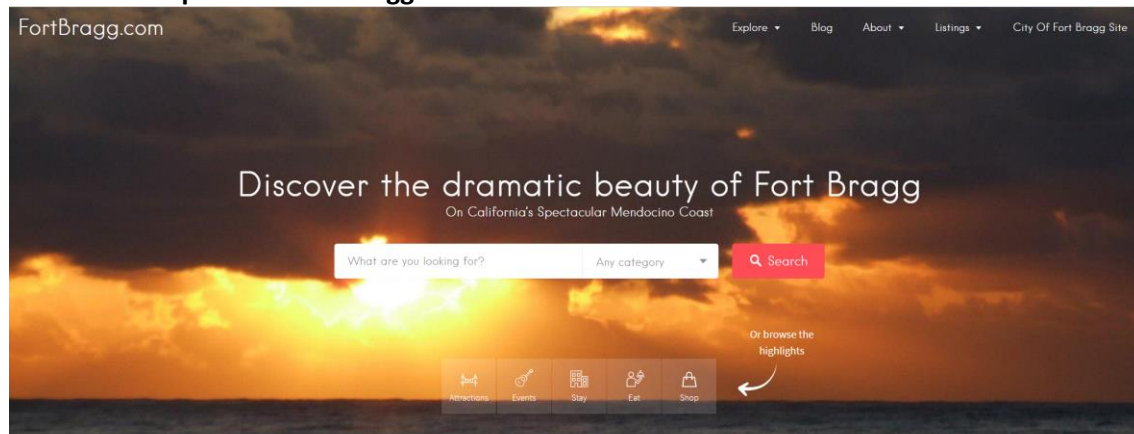
Overall spending is broken down as follows:

Figure 1: City of Fort Bragg Tourism Promotion Funding



Source: City of Fort Bragg

Exhibit 2: Sample-Visit Fort Bragg.com

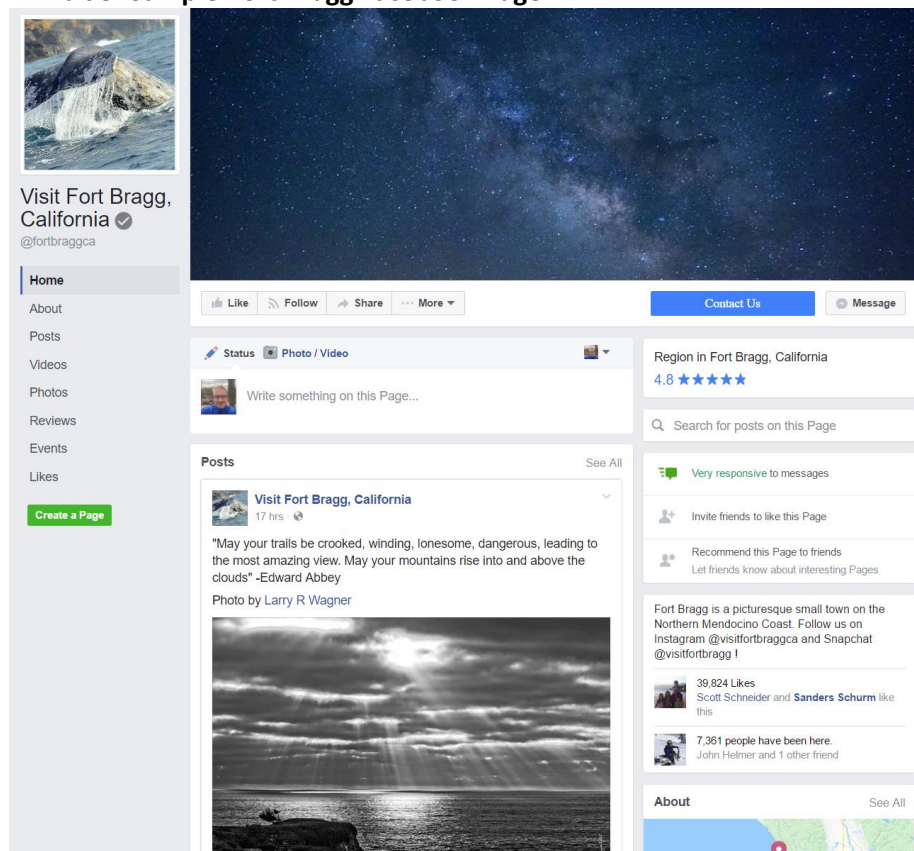


Talk of the Town

Fresh articles from the blog

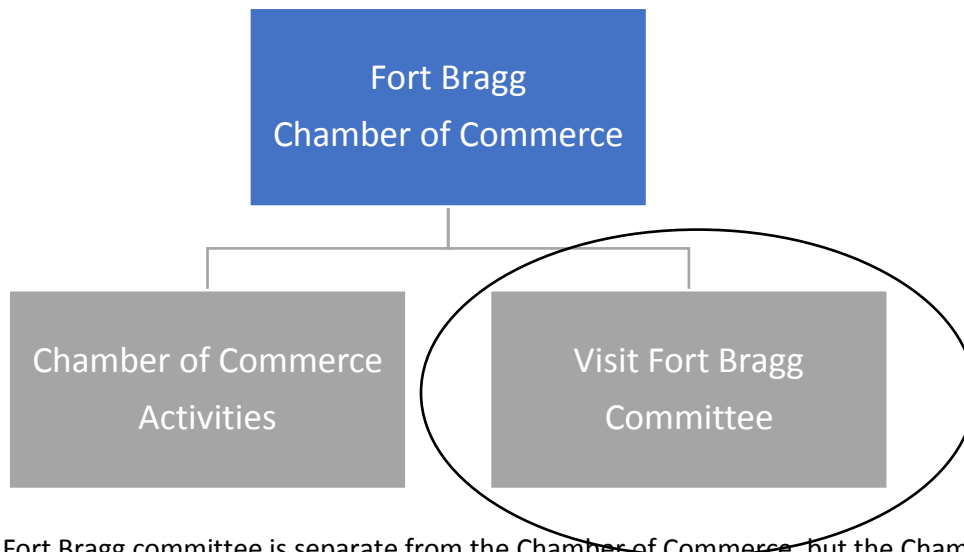


Exhibit 3: Sample-Fort Bragg Facebook Page



These programs are administered by the Mendocino Coast Chamber of Commerce through the Visit Fort Bragg Committee. This committee includes volunteers from the community, a City staff liaison, and supervision by Chamber staff.

Figure 2: Visit Fort Bragg Committee/Mendocino Coast Chamber of Commerce Structure



The Visit Fort Bragg committee is separate from the Chamber of Commerce, but the Chamber provides administrative support and oversees the implementation of a variety of marketing programs to promote the city. These efforts include the following:

- Development and maintenance of the Visit Fort Bragg website and blog;
- Visit Fort Bragg Social Media efforts;
- Promotion of Special Events that encourage visitation;
- Advertising including radio; and
- Development of video assets to promote Fort Bragg through their social media channels.

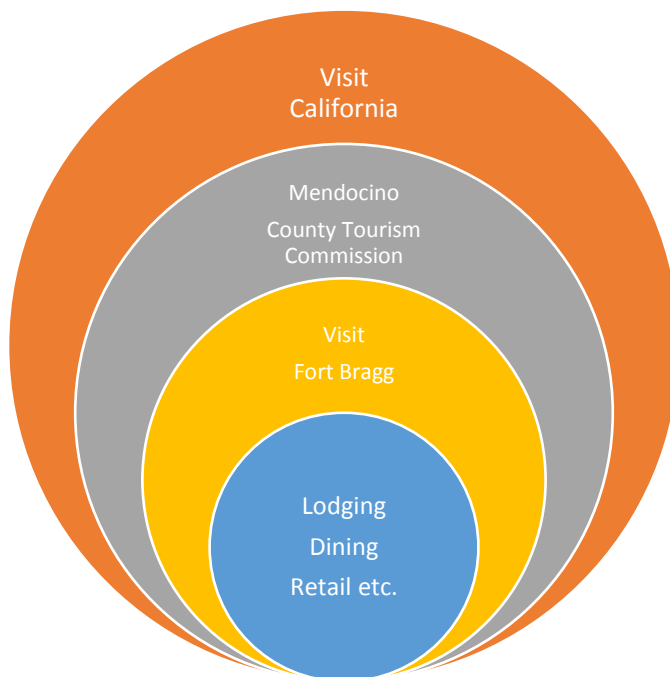
The Visit Fort Bragg committee has provided a cost-effective approach for the City of Fort Bragg's tourism promotion.

Fort Bragg Tourism Funding

In November 2016, the City of Fort Bragg passed Measure AA which increased the Transient Occupancy Tax from 10% to 12%. Measure AA was approved along with an accompanying advisory Measure AB which recommended that one-half of the additional funding would go to support tourism related projects and promotion. It is anticipated that the incremental new available funding will be approximately \$200,000 annually. Existing funding from the City will continue, so total available funding is expected to be approximately \$285,000 per year.

With these additional promotion funds, the City of Fort Bragg can leverage its efforts with the current tourism promotions efforts of Visit Fort Bragg, Visit California and the Mendocino Tourism Commission. By creating additional awareness for Fort Bragg, the City can influence visitors to come to the area and in turn generate travel spending within City Limits.

Figure 3: Relationship of Visit Fort Bragg To Mendocino County and Visit California Tourism Promotion



Because of this dedicated funding, the City of Fort Bragg will be well situated to develop and implement a sustainable tourism marketing program enabling them to increase their overall competitiveness.

Part II: Summary Research Findings

A summary of the four research elements related to the project can be found here with more detailed reports available separately.

1. Fort Bragg/ Mendocino County Research

Summary

This study was developed using the email database of the Mendocino Tourism Commission. This database includes those individuals who have provided their email address because of some interest in tourism in Mendocino County. The following results are based on 550 completed surveys¹. (A full summary of the study is available as a separate document.)

Highlights of those surveyed:

- Fully 70% indicated they has taken an overnight trip to Mendocino County in the past two years. Of those, fully 43% indicated they stayed in Fort Bragg, the single largest location.
- Of those that stayed overnight in Fort Bragg, 63% indicated they stayed in a hotel/motel followed by condominium/Vacation home 11%, campground 9% and Bed and Breakfast 5%
- Visitors had the following the perceptions of Fort Bragg:

Statement	%
Is a place that has scenic wonders	92%
is a place that offers outdoor recreation	91%
Is a place that has an interesting history	87%
Is a place that has activities I like to do	82%
Is a place that has friendly people	81%
Is different in a way I like	80%
is different from other parts of the coast	75%
Is a place that offers a wide variety of lodging	67%
Is a place that is easily accessible	46%
Is a place that has lots of cultural and artistic activities and events	46%
Is a place that has wineries/breweries and wine /beer tasting I like	42%

- Visitors indicated, in terms of destination attributes that set Fort Bragg apart from other coastal destinations, the following:
 - Scenic wonders 39%
 - History & heritage 12.4%
 - Coast location 20%
 - Outdoor recreational activities 5.6%
 - Friendly people 5.3%
 - Culture 1.7%

¹ Survey confidence level is 95% +/- 4.1%

- When thinking about places to visit in Mendocino County, 90% indicated Fort Bragg, followed by Mendocino 88%.
- When asked whether they agree or disagree with specific statements about Fort Bragg, those surveyed indicated the following:
 - Is a place I would like to visit 85%
 - Is a place that has scenic wonders 80%,
 - Is a place that has an accessible via Highway 1 75%
 - Is a place with interesting history 75%
 - Is a place that offers outdoor recreation 71%
 - Is located in place I like to visit 48%
 - Is a place that has friendly people 49%
 - Is a place that is different from other parts of the North Coast 43%
 - Is a place that has wineries and wine tasting I like 30%
 - Is a place that has lots of cultural activities and events 27%
- Visitors indicated the following categories Influenced their decision to visit Fort Bragg:
 - Good lodging prices/quality 50%
 - Just to get away 48%
 - Touring Highway 1 34%
 - Activities they like to participate in 31%
 - Outdoor recreation choices 28%
 - Visiting wineries 16%
 - Attending a special event 14%
- Primary reason why non-visitors have not visited: (top 3)
 - The destination is too far 22%
 - Just never thought about it 16%
 - Lodging rates 5%
- In terms of destination attributes that set Fort Bragg apart from other coastal destinations, visitors indicated the following:
 - Coastal location 61%
 - Scenic wonders 55%
 - History & heritage 45%
 - Outdoor recreational activities 29%
 - Has a nice downtown 27%
 - Friendly people 24%
 - Special events 13%
 - Culture 13%
 - Traffic/crowding 11%
 - Wineries 11%
 - Lack of lodging quality and choices 8%

- Lack of dining quality and choices 8%
- A first-time question was added related to travel and Marijuana. 76% indicated they would not travel to Fort Bragg specifically for the education surrounding and participation of marijuana growing and usage. 7% indicated they would and 15% indicated they were not sure.

Key Findings:

There were several key findings from this research. Approximately 40% of overnight visitors indicated they stayed in Fort Bragg, the single largest location within the County. Additionally, visitors viewed Fort Bragg as different from other coastal destinations this creates an opportunity to further differentiate the destination and develop a clear competitive advantage.

2. Fort Bragg Lodging Survey

Summary

This survey was developed using the actual lodging data base of overnight visitors from participating properties in Fort Bragg. The results provide additional insights into overnight visitors. A total of 700 surveys were completed². (A complete analysis is available in a separate report.)

Highlights

- Of those that responded, fully 85% indicated that they had previously been to Fort Bragg, 15% indicated their most recent trip was their first visit.
- Fully 90% indicated the trip was a pleasure trip.
- In terms of trip frequency, the average number of trips over the past five years was 9, while the average number of trips in the past 12 months was 2, suggesting visitors are making slightly less than 2 trips annually.
- In terms of activity participation, the top 5 activities visitors participated were casual dining 84%, boutique shopping in Fort Bragg 55%, visited Glass Beach 55%, boutique shopping in Mendocino 40%.
- Approximately 47% indicated they would return for business purposes in the next 12 months while 87% indicated they would return for pleasure in the next twelve months.
- In terms of season visitation, the most frequently visited season is summer 30% followed by fall 25%, winter 22%, and spring 21%.
- 93% indicated they travel by private vehicle to Fort Bragg.

² Survey confidence level is 95% +/- 3.85%

- 80% indicated they were very satisfied with the overall value of their visit to Fort Bragg.
- 45% indicated they had seen or heard of advertising specifically promoting Fort Bragg as a destination.
- In terms of where they may have seen or heard that advertisement, 56% indicated email, followed by magazine advertisement, internet 31%, and social media. (It should be noted that these results are from lodging property databases. As such, respondents may attribute advertising sources to the property they stayed in and not the destination.)
- Fully 53% indicated they used the internet to either plan or purchase any part of their trip.
- When asked which of the following they researched, 86% indicated lodging options and availability, followed by things to do 46%, dining activities 43%, places to see 37%, attractions 27%, outdoor recreation activities 26% and shopping activities 10%.
- When asked how they found the website to plan or purchase any part of their trip, 61% indicated search engine, followed by link from another site, article (internet or traditional print) 4.6% and Facebook 3.6%. Approximately 21% indicated other sources.
- In terms of ratings of Fort Bragg on a scale of 1 to 7 with 7= Complete Agree and 1= Disagree Completely, they ranked the following:

6.5	Is scenically beautiful with awe inspiring nature
6.5	Is a good way to get away from it all
6.2	Has lodging choices I like
6.1	Provides a unique vacation experience
6.1	Is a good family destination
6.1	Has the kind of outdoor recreational activities I like
6.0	Is a good year-round vacation destination
6.0	Has quality lodging
6.0	Has a feel that I like
5.6	Has a downtown I like
5.6	Has quality restaurants
5.6	Has restaurant choices I like
5.5	Has a downtown with restaurants that appeal to me
5.4	Has more and more things that I like to do
5.3	Has a downtown with shops that appeal to me
5.3	Has the kinds of special events I like
4.3	Is in need of upgrading its physical appearance
- 21% indicated they used Fort Bragg.com to assist them as part of their trip planning.

Key Findings:

It is important to note that those that respondents in this survey had a significantly higher likelihood of being a repeat visitor. Suggesting that as visitors experience the area they enjoy their experience and continue to visit. It also suggests that the role of tourism promotion should focus primarily on attracting new visitors and to a lesser degree on repeat visitors.

Selected Survey Comparisons

In collecting survey data from two different sources, the Fort Bragg/ Mendocino County Research (Visit Mendocino County database) and Fort Bragg Lodging Survey, the following comparisons provide additional insight. we have developed the following comparisons for additional insight.

Table 1: Demographic Comparisons

	Lodging Survey	Mendocino County Survey		Lodging Survey	Mendocino County Survey
Gender:			Age:		
Male	26%	39%	Under 25	2%	.5%
Female	74%	61%	25-30	4%	2.5%
			31-40	11%	7.3%
			41-50	20%	9.5%
Marital Status:			51-60	31%	27%
Single	15%	19%	61+	32%	52%
Married	73%	67%			
Widowed	3.1%	5.8%	Income:		
Living Together	9%	8.1%	0-\$29,999	5.4%	7.3%
			\$30-39,999	3.7%	5.1%
			\$40-\$49,999	7.9%	6.3%
Family:			\$50-\$59,999	8.9%	7.7%
No Children	21%	15.5%	\$60-\$69,999	9.5%	6.8%
Children at Home	30%	50%	\$70-\$99,999	23.7%	19.4%
Empty Nester	48%	33%	\$100-\$149,999	20.8%	26.6%
			\$150-\$199,999	11.3%	13.3%
			\$200,000 +	8%	7.4%

Numbers may not foot due to rounding.

- Marital status is similar though there is a slightly higher percentage of married couples who responded to the Lodging Survey.
- Family structure was significantly different in that those participating in the Lodging Survey were much more likely to have no children or be empty nesters while those from the Mendocino County Study were more likely to have children at home.
- The majority of respondents in both surveys were over the age over 40. This indicates that a more direct approach to a younger segment is necessary as a way to attract and build long term loyalty for future visitation to Fort Bragg.

3. Website Analysis

A second research component was a review of the Visit Fort Bragg Website and includes the following key information. (A complete analysis is available in a separate report.)

Summary

This study is a review of the current Visit Fort Bragg website (www.Fortbragg.com). SMG consultants reviewed current Google Analytics³ to understand the volume of users as well as their website use patterns.

Highlights:

- Overall the website, despite its modest budget, is attracting approximately 331,000 unique users over the past 12 months⁴.
- The site traffic is highest during the summer months with spikes in activity driven by national/online press coverage.
- Overall, the site gets great amounts of organic traffic (traffic that comes to the website that is unpaid search). Approximately 76% of that traffic comes via organic search with 14% coming direct and 5% via social media channels.
- The bulk of website search comes for people looking for information on Glass Beach. Once on the site, the bounce rate (the percentage of users that visit the site and leave without clicking to go anywhere else of the site) is rather high, and both the time-on-site and pages/visit metrics are far too low. Average length of 1:24 and average pages per session 1.79 are below industry norms.
- Fully 35% of visitors who arrive at the site by way of the explore/glass-beach/page are nearly double of those who arrive via the homepage. When combined with other Glass Beach related pages, this number is over 40%.
- The Glass Beach page is the de facto homepage since the official homepage receives only 80,000 entrances over the past 12 months.

Recommendations

- Overall, the site needs to do a better job of attracting people who click out to other pages in order to investigate more Fort Bragg information, which will result in more influence to convert website visitors to actual visitors. This is especially true on the Glass Beach page, which receives

³Google Analytics refers to the measurement reports that are used to track the use and performance of the website.

⁴ Google Analytics

more entrance traffic (meaning it's the first page people see) than the homepage of the site, from which only about 20% go on to visit a second page.

- Build out the Glass Beach page to serve more as a landing page.
- Add 'Recommended Reads' and 'Related Attractions' sidebars and bottom bars to every page.
- Hide comments on pages by default.
- Produce more and more content. Create itineraries for specific segments.
- Internalize outbound links when possible and add social sharing widgets to every page.
- Add text at the top of each directory page, add a 'getting here' page, and optimize pages for speed to improve SEO.

4. Social Media Analysis

Summary

SMG Consultants reviewed Visit Fort Bragg Social media programs including Facebook, Instagram, Twitter, and YouTube. Given that social media is a key part of destination marketing, these efforts are important in creating awareness and driving consumers to the website.

1. Facebook

Strengths

1. Fort Bragg has significant natural assets that can be captured and promoted with its great photography.
2. Visit Fort Bragg has good followership (40,132 Likes as of January 2017)

Recommendations

1. Develop an appropriate level of budget to support this program after being evaluated in the context of the overall budget.
2. Create more stories and images: Landscape photos, “What to Do”, Lodging Discounts, Arts & Crafts, Food and Beverage, Festivals, Featured Business, or Weather updates
3. Create an Image Contest or have weekly giveaways that will engage and grow followers. Facebook Likes can grow 1k + in less than a month.
4. Use Visit Mendocino Facebook page as a reference.
5. Develop a Social Media Calendar. For example:
 - Monday: Sunrise, Sunset, Landscape image
 - Tuesday: What’s going on in Fort Bragg
 - Wednesday: Deal’s
 - Thursday: Weekend Weather Update
 - Friday: Food and Beverage
 - Saturday: Sunrise, Sunset, Landscape image
 - Sunday: Sunrise, Sunset, Landscape image

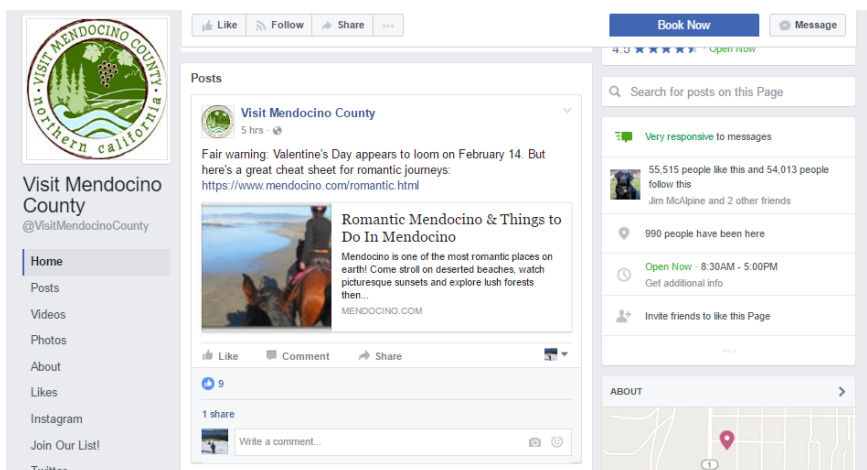


Exhibit 4:
Visit Mendocino County
Facebook page

2. Instagram

Strengths

1. Fort Bragg has significant natural assets that can be captured and promoted with its great photography.
2. Has really great engagement; average likes per image are over 400.

Recommendations

1. Develop an appropriate level of budget to support this program after being evaluated in the context of the overall budget.
2. Post a wider variety in imagery.
3. Incorporate hashtags: #OptOutside, #GetOutside, #GetOutdoors, #DoYouTravel, #Visit California
4. Recruit Influencers: @kathryn_dyer or @chrissykay.
5. Post one to two photos a week that are not “re-posts”. People like to see that the Fort Bragg Social Media team is active in exploring the destination. Suggested copy: | Image icon: Fort Bragg Team | hashtags
6. Repost images every other day. We recommend reposting people’s images that have 1,000 or more followers.
7. “Like” other Instagram followers with a goal of 100 likes a day and 10 comments a week.



Exhibit 5

Great example of hashtags and comments. We recommend responding to comments.

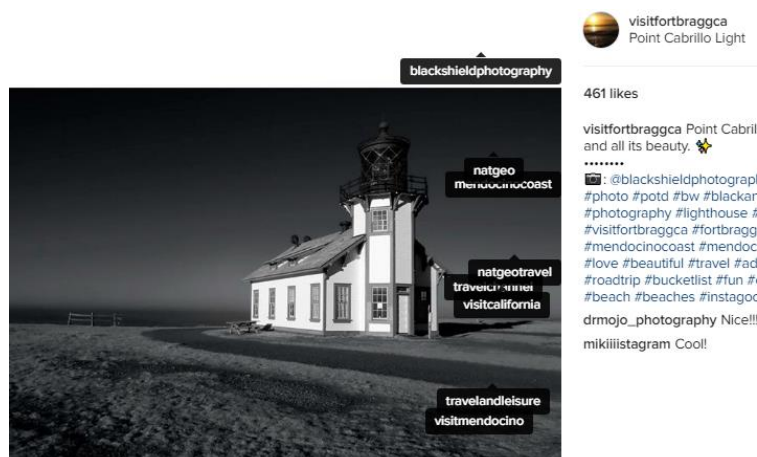


Exhibit 6

Tagging images is extremely important. Another great example of using tags appropriately.

3. Twitter

Strengths

1. Profile and cover image speak loudly in an effort to create message awareness. Great options. Investment within the context of the overall budget

Recommendations

1. Switch out the cover image every six months.
2. Connect Facebook & Instagram with Twitter to show consistency.



Exhibit 7-Twitter

3. YouTube

Strengths

1. Can work towards improving YouTube page by developing more video content.

Recommendations

1. Evaluate funding within the context of the overall budget
2. Create five B-Rolls (video) about the destination. Topic suggestions: Who is Fort Bragg, Hidden Gems, Food and Beverage, Outdoor Activities, etc.

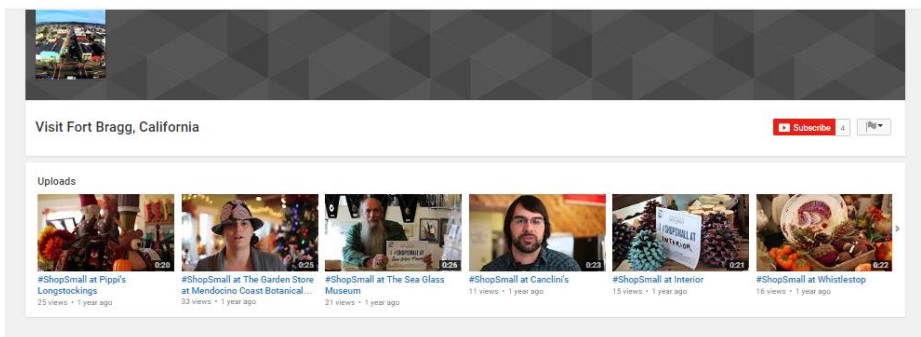


Exhibit 8- YouTube

5. Community

5. Stakeholder Workshops/Interviews

Summary

This research element included interviews with stakeholders from Fort Bragg. (Two Community workshops were held and additional stake holders were interviewed. A total of 35 people participated in the element.)

Highlights

- Overall those interviewed perceived Glass Beach and the activities it offers to be a primary activity in Fort Bragg.
- Stakeholders identified the following as potential tourism opportunities:
 - The nascent marine biology center
 - The harbor and its dining and water based recreation activities
 - The new Coastal trail
 - Develop an event center as a potential for group activities and increase mid-week group/meeting business.
 - Area history
 - The majestic coastline
 - The access to California Redwoods and outdoor recreation
 - Arts & Culture
 - Downtown Fort Bragg
 - Dining options
 - A great place to unplug
 - The laid-back nature of Fort Bragg
 - The local artistic talent
- Many stakeholders indicated that Fort Bragg and its local culture are distinctly different from its neighbor Mendocino and Fort Bragg provides its visitors with a different feel and experience.
- Stakeholders recognize the importance of the downtown but suggest that vacant buildings are a challenge. Other comments on the downtown included a concern that some city ordinances are too restrictive and limit the local and visitor experience.
- Stakeholders also voiced that outdoor recreation is a key to building Fort Bragg tourism, including sport fishing, hiking, mountain biking, road biking, motorcycle touring, kayaking, stand up paddle boarding and more.
- Stakeholders were supportive of Fort Bragg as a competitive visitor destination and additional marketing efforts could be beneficial

- Input as to some of the challenges and threats Fort Bragg faces included the following:
 - The role of AirBnb on the lodging industry;
 - Potential negative impacts of the 2% increase in Transient Occupancy tax;
 - Confusion of the Fort Bragg name with the Fort Bragg, North Carolina army base; and
 - Increased competition from other coastal destinations.
- Tourism efforts should focus on times that are less crowded.
- Visitors included families, couples from Northern California as well as international visitors touring California.
- Stakeholders also voiced concerns regarding the homeless in Fort Bragg as a potential deterrent for visitors.

What the Research Means for Fort Bragg Tourism

In analyzing the research, it is important to understand the information and how it can be used to assist in the development of a marketing plan. The marketing strategy is designed to create awareness of Fort Bragg as a destination and influence targeted visitors to visit the destination. In doing so, the information has been categorized into the product/experience, the visitors, and marketing efforts.

The Fort Bragg Product/Experience

The Destination

- Overall, Fort Bragg offers a variety of natural assets that lend themselves to the tourism experience. The research is clear; consumers agree the destination has scenic wonders, coastline, access to the redwoods and is a place to visit.
- Visitors also give the destination strong ratings in how the destination feels to them.
- Visitor also indicate it's a good family destination.
- Visitors indicate the destination has good highway access. While many local stakeholders mentioned concerns about the two-lane highways, visitors didn't seem to have the same concerns. It may well be that the drive is in fact part of the overall experience and might need to be marketed as such.
- When considering the macro view of Fort Bragg as a tourism destination, there appear to be five major assets that help to define the destination:
 - The Coast- the incredible Mendocino County coast and its accessibility to Glass Beach via the new Coastal Trail.
 - The Redwoods- access to the iconic California redwoods.
 - The Harbor – the harbor provides access to water based recreation including stand up paddle, boat rental and kayaking
 - The Downtown- the downtown provides visitors with a unique combined shopping and dining experiences that are boutique in nature.
 - Local Culture- perhaps the most important asset and the one that really can have the most impact on differentiating the destination is the local culture of Fort Bragg and its residents.

It is the combination of these assets that serve as the backdrop for a Fort Bragg visitor experience. The list also provides a good diversity of assets that can interest a broader market of potential visitors and the opportunity to cross sell/educate them on other elements of the destination.

The Experience

- Fort Bragg provides visitors with a variety of outdoor recreational opportunities, both land and water based, in which visitors enjoy participating.
- The destination also provides visitors with a wide range of dining experiences, including everything from experiencing local beer and wine to fine dining.
- The downtown is viewed positively by visitors and though there is concern with current vacancies or hours of operation, the downtown is an important asset as it provides unique shopping and dining opportunities that are critical parts of the vacation experience. Visitors gave strong ratings to the restaurant choices and quality as well as to the downtown shops that are available.
- Glass Beach and the new Coastal Trail provide visitors with a unique opportunity to interface with the Mendocino coastline and experience the ocean firsthand.
- Fort Bragg provides visitors with a unique feel that is different from its neighboring Mendocino. Fort Bragg has been described as more down to earth, real, and family friendly. These distinctions can be leveraged to communicate key points of differentiation with the destination.

Fort Bragg Visitors

- The data illustrate that Visit Fort Bragg does a good job of attracting visitors in the 40 and above age category, while those under forty are a much smaller part of the visitor market. This suggests that the area is more attractive to older visitors and that some future marketing efforts should create awareness among the 30 somethings and the millennial segment.
- The data also makes it clear that the primary season of visitation is summer, and to a much lesser degree, winter and spring seasons.
- Fort Bragg visitors are consistent in taking approximately 2 trips per year to the area. With the right incentives, it may be possible to increase that frequency. Additionally, it illustrates that bringing new people to the area has the potential of exponentially increasing visitation, because once people come here they tend to come back.
- Another potential opportunity is to increase the overall length of stay by attract longer stay destination visitors.

Marketing

- It's clear that marketing efforts have been limited due to funding, and now with the additional funding, Fort Bragg will be able to more aggressively market the destination.

- Despite the lack of funding, Visit Fort Bragg marketing efforts have gained traction in the marketplace, generating website users, Facebook followers, Instagram engagements and so on. While there are additional opportunities, these efforts illustrate even with a small budget, results are possible.
- Fort Bragg visitors follow predictable behavior about marketing outreach. Potential visitors become aware of the destination, then use search engines to find the Visit Fort Bragg website where they are influenced to visit or not to visit the area. The basic system has been developed but can be significantly enhanced with additional funding.
- The additional funds should be able to enhance the measurement of tourism marketing programs. With this increased measurement, constant refinements can be made to the marketing efforts as well as provide a return on investment for the city.

Part III. Recommendations

Marketing

SMG has developed a Fort Bragg Tourism Action Plan that includes all recommended steps for the tourism marketing effort.

Organization

Currently, administration for Fort Bragg's tourism promotion efforts is being provided by the Chamber of Commerce with the Visit Fort Bragg committee developing and overseeing various marketing programs.

Given the enlarged budget, it may be prudent to review the current structure considering the more expansive and aggressive marketing strategy that will be developed and implemented. We are proposing both short term/mid-term and long term options for consideration.

Short/Mid-Term Recommendations:

The short to mid-term recommendation includes the following:

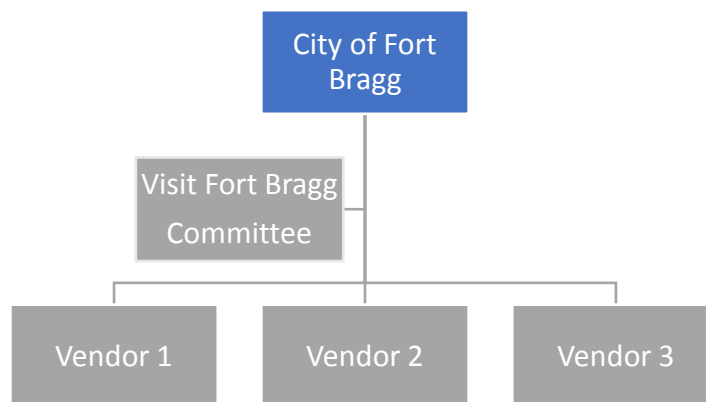
1. Administrative oversight and support to be provided by the City of Fort Bragg. The city is ultimately responsible for funding and implementing all the marketing programs.
2. A marketing advisory committee (Visit Fort Bragg) should continue to guide the expenditure of funds and the implementation of the strategy. We recommend a 7-person committee from a cross-section of the business and attractions community. We propose the following seats for consideration:
 - Three for the lodging industry – 1 flag branded hotel, 1 non-branded hotel and 1 bed & breakfast property.
 - One seat from the dining sector
 - One seat from the retail sector
 - One seat from recreation/attraction
 - One seat from art and culture
3. These appointments can be made or decisions delegated by the city manager, or each industry sector can nominate their choice to be on the committee. The seats should be staggered with some having two year appointments and others three year appointments to avoid depleting the committee all at once.
4. Based on the analysis of our review, the Chamber has done a good job with the website and social media components with the existing marketing dollars and should be asked to bid to provide those

services under the new structure. The Chamber has intimate knowledge of local activities and can thus provide ongoing content for the website and social media programs.

Overall, Fort Bragg has the tourism assets necessary and has shown, with its current marketing programs, it can drive awareness and visitation. Key to optimizing future success is the development of a competitive level of funding and oversight to implement programs to increase targeted demand for both public and private sector tourism stakeholders.

The figure below illustrates the new proposed structure. The primary benefit of this structure is the City can provide systems and management to get the program started and maintained. The challenges will be how fast the city can react to marketplace changes, providing adequate staffing as it is anticipated to be a higher cost than the private sector and managing the complexity of bureaucracy in contracting with outside vendors for needed services. The implementation of the marketing plan will be managed by the Community Development Department staff with direction by the City Council and the Visit Fort Bragg Committee.

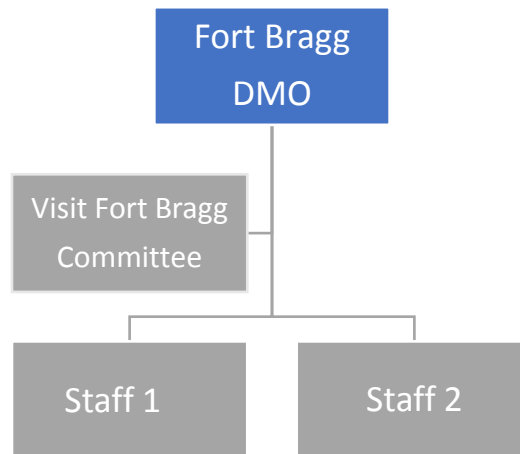
Figure 3: Potential Organization Support Structure



The Long-Term Recommendations

As the budget grows, we see the need for the City of Fort Bragg to assess the effectiveness of the organizational structure and if needed consider moving toward the formation of a Destination Marketing Organization (see Figure 4). A DMO will provide significant advantages over a city department including a singular focus on tourism the ability to respond to marketplace changes faster and in contracting hiring practices. The DMO is the norm within the industry and offers many advantages such as the ability to respond quickly to market place changes, a complete focus on tourism related issues, and the structure makes it easier to bring the tourism stakeholders together.

Figure 4: Potential Long Term Structure



We recommend that if/when the budget grows into the \$400,000 to \$500,000 range, the City of Fort Bragg should conduct a formal review of the existing structure and its effectiveness in implementing tourism marketing plans to see if an alternative structure such as the more common DMO structure is warranted.

It's important to keep in mind "structure follows strategy" and it is anticipated at some point the strategy necessary to compete effectively will outgrow the short term structure.

Summary Comments

Fort Bragg has all the necessary assets to be an even more competitive destination within the California tourism Industry. Its natural assets, along with its infrastructure, access, unique community values now coupled with an increase in tourism promotion funding will enable the destination to more aggressively promote itself and influence more consumers to visit the area to increase revenues, employment and taxes.