

# Fort Bragg/Mendocino County California

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## Visitor Survey

Topline Results  
February 2017

2.0



*Solutions for your competitive world*

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## Introduction

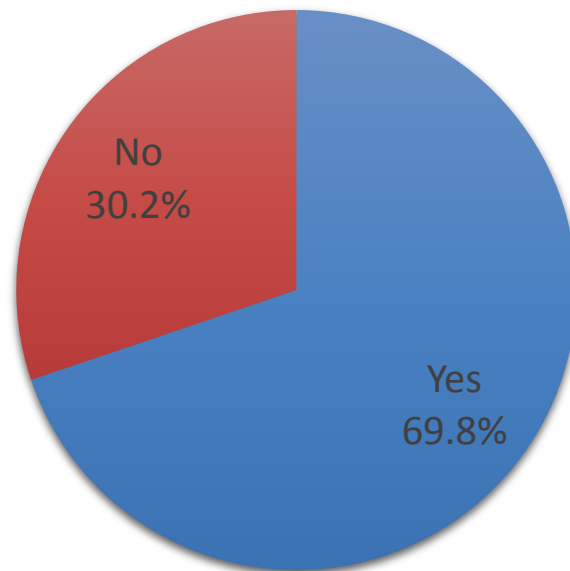
### Methodology

SMG Consulting (SMG) conducted an online intercept survey of VisitMendocino.com email database. The survey was open to website visitors from January 11-31, 2017. Overall, 550 website visitors completed the survey<sup>1</sup>.

### Visitor and Non-Visitor Respondents

- Among the 550 respondents who completed the survey:
  - 70% (N=384) had visited Mendocino County for an overnight visit in the past two years.
  - 30% (N=166) had not visited in the past two years.
- Survey respondents who had visited Mendocino County and/or Fort Bragg answered questions about their travel behavior, including activities and lodging, and their perceptions of the area.
- Respondents who had not visited Mendocino County and/or Fort Bragg were asked to describe reasons they had not visited, their perceptions of the area, and likelihood of future visits.

Have you visited Mendocino County for an overnight trip within the past 2 years?  
All respondents (N=550)

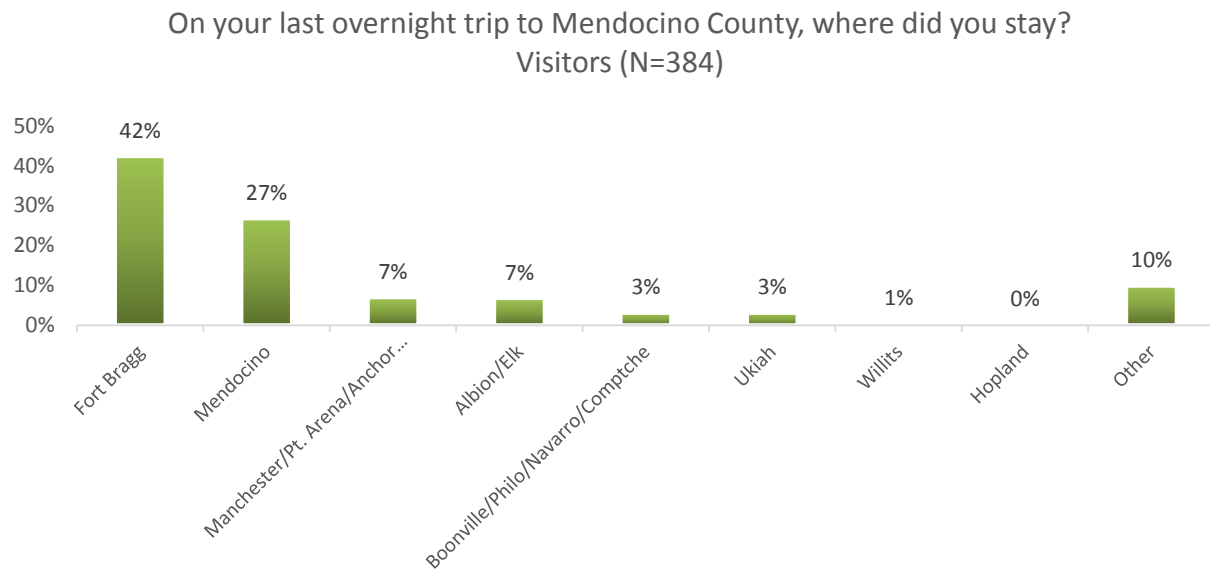


<sup>1</sup> Survey confidence level is 95% +/- 4.1%

### Area Stayed

Visitors indicated the area in Mendocino County where they stayed on their last visit.

- Fort Bragg was selected most often (42.4%), followed by Mendocino (26.8%).
- 7% stayed in Manchester/Pt. Arena/Anchor, and 6.8% stayed in Albion.
- Other areas accounted for 3% or less of respondents.

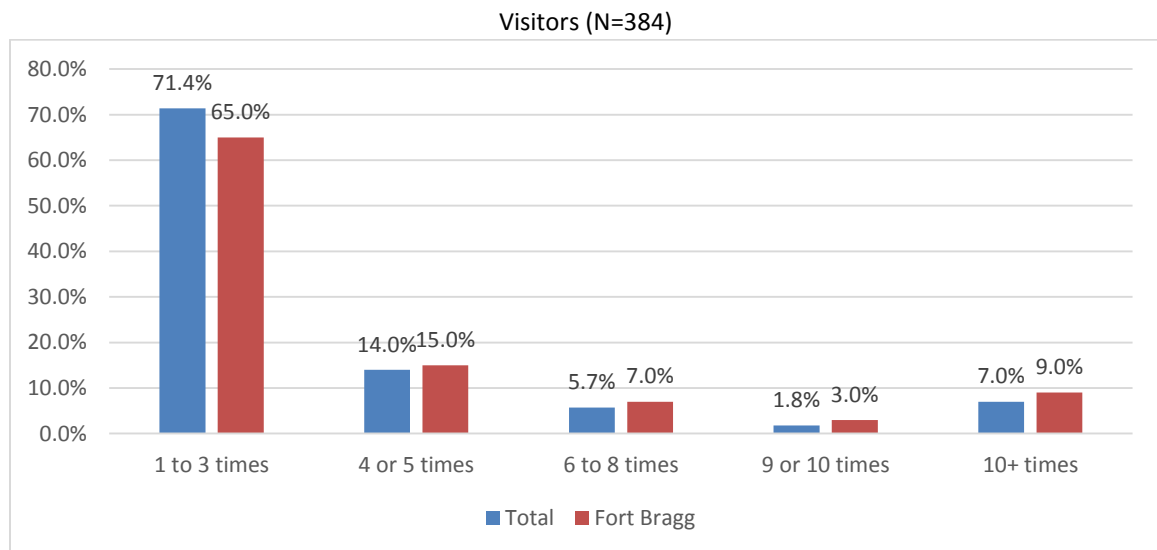


### Visitor Travel Behavior

#### Number of Visits per Year

- Among visitor respondents, 71% reported visiting Mendocino County between one and three times annually; an additional 14% visited four or five times.
- Among Fort Bragg visitors, 65% reported visiting Mendocino County between one and three times annually; an additional 15% visited four or five times.

On average, how many times do you travel to Mendocino County annually?



- Those who stayed in Fort Bragg on their last overnight took slightly more trips, averaging 3.9 trips a year, compared with 3.5 among all visitors.

### Number of Nights Stayed

When asked how many nights they stayed in Mendocino County on their last visit, visitor respondents reported staying an average of 3.3 nights.

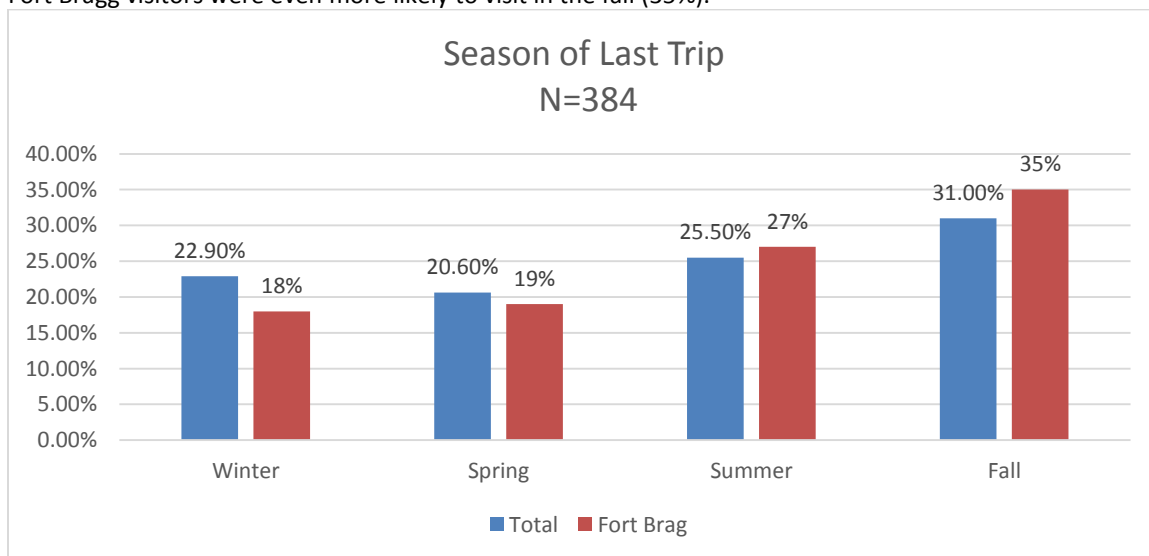
- Fort Bragg visitors stayed an average of 3.1 nights. Very little variance from the overall results.
- 81% of visitors stayed between 2 and 7 nights.
- 15% stayed one night; only 4% stayed 8 nights or more.



### Season Visited

The survey asked visitors to indicate the season during which they took their last overnight visit to Mendocino County.

- Visits were distributed across seasons, with Fall being the most frequently-selected season (31%) and Spring being the least frequently-selected season (21%).
- Fort Bragg visitors were even more likely to visit in the fall (35%).

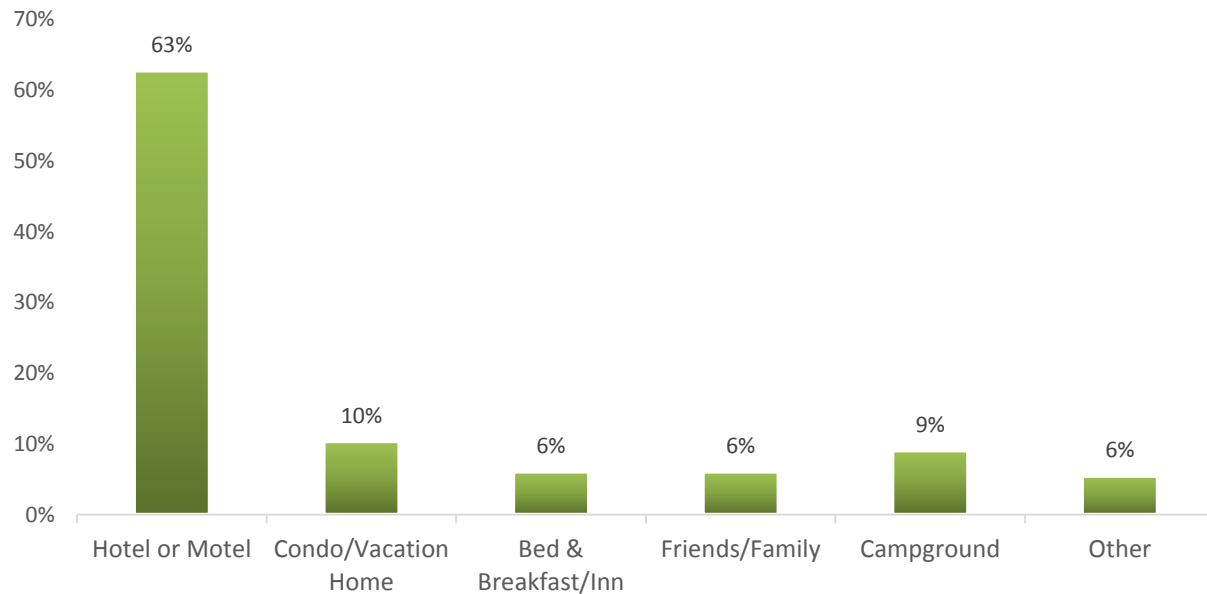


### Fort Bragg Lodging

The survey asked respondents who reported staying in Fort Bragg on their last overnight visit to select the lodging they stayed in during their trip.

- Most Fort Bragg visitors reported staying in a hotel or motel (63%).
- The remaining respondents were distributed over other types of lodging: 10% stayed in a condo or vacation home, 9% stayed in a campground, and 6% each stayed in a bed & breakfast, with friends and family, or in another type of accommodation.

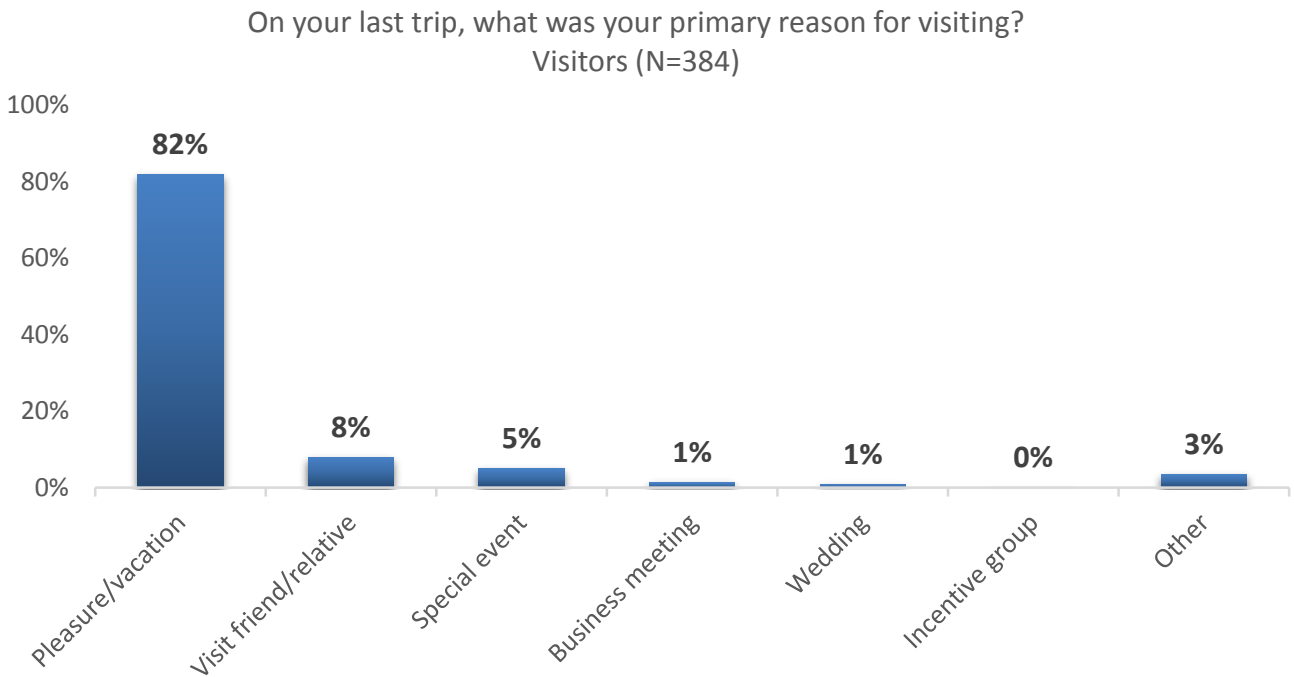
On your last trip to Fort Bragg what type of lodging did you stay in?  
Fort Bragg Visitors (N=166)



## Visit Influences

### Reason for Visiting

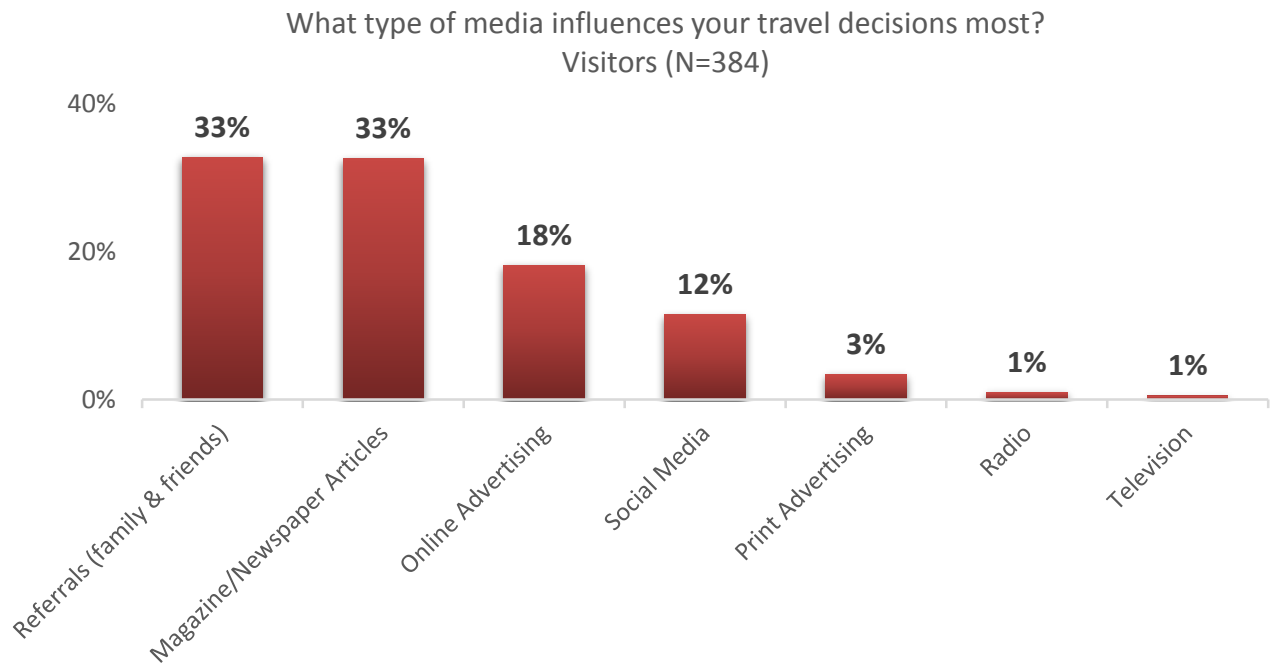
- Most visitors (82%) visited Mendocino County for pleasure or a vacation.
- An additional 8% visited a friend or family member, and 5% visited for a special event.
- Few visited for business or a wedding, and none visited as part of an incentive group.
- Little change existed between Fort Bragg visitors and other respondents.



### Media Influence

Respondents also indicated the type of media that most influences their travel decisions.

- Visitors selected “referrals” and magazine and newspaper articles most often (33% each).
- These were followed by online advertising (18.2%) and social media (11.5%)
- Few selected print (3.4%), radio (1%) or television (0.5%).
- Few differences existed between Fort Bragg visitors and those who stayed elsewhere.

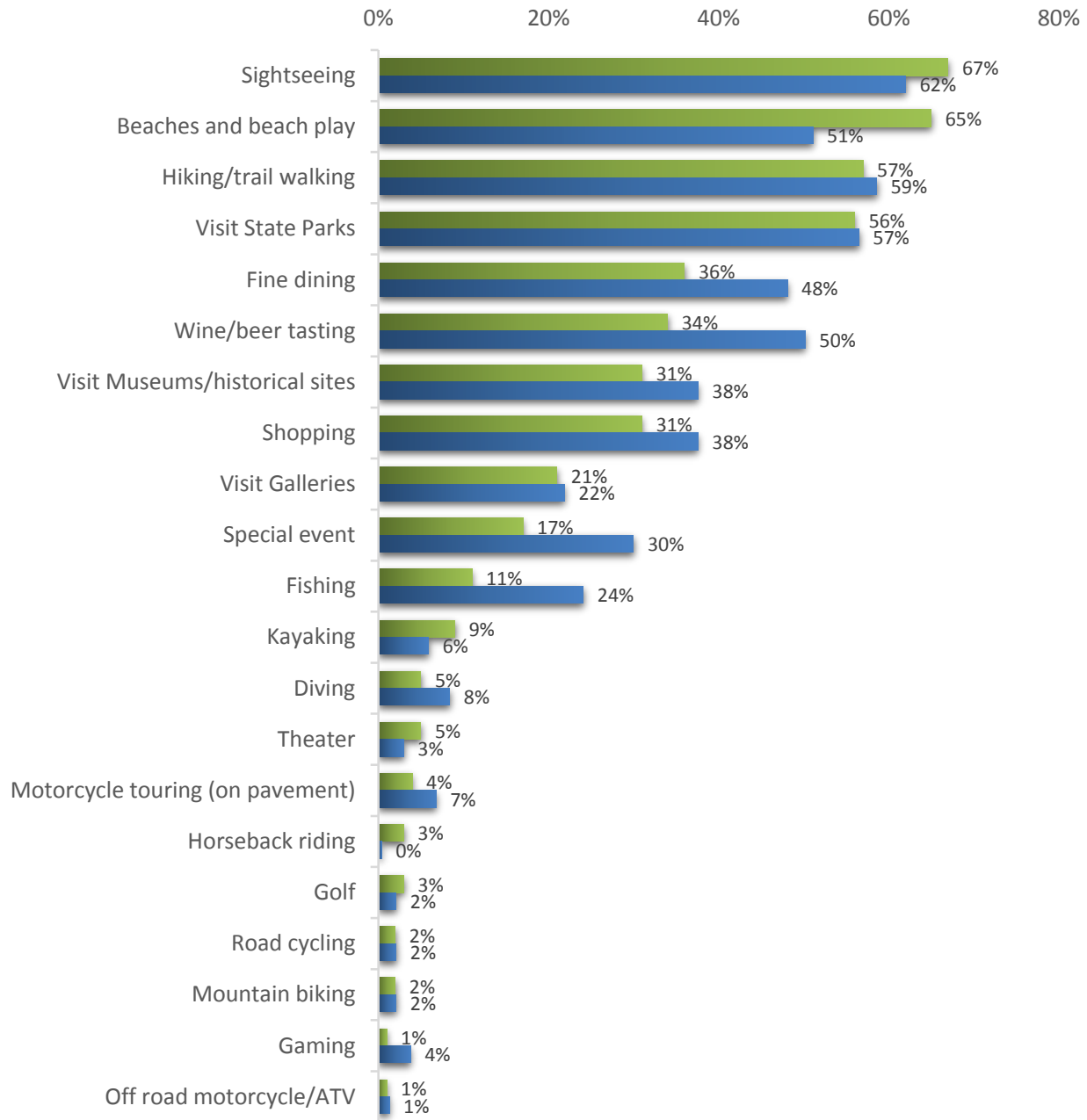




### Influencing Activities

The survey asked visitors to indicate which activities influence their visit to Mendocino County.

- Sightseeing was selected most often (65%), followed by beaches and beach play (59%), hiking and trail walking (58%), and visiting state parks (56%).



What types of activities influence your visit to Mendocino County?  
Visitors (N=384)

■ Ft. Bragg Visitors (N=176) ■ Other Visitors (N=237)

- Fort Bragg visitors were much more likely to select “beaches and beach play” (65%, compared with 51% among those who stayed elsewhere).

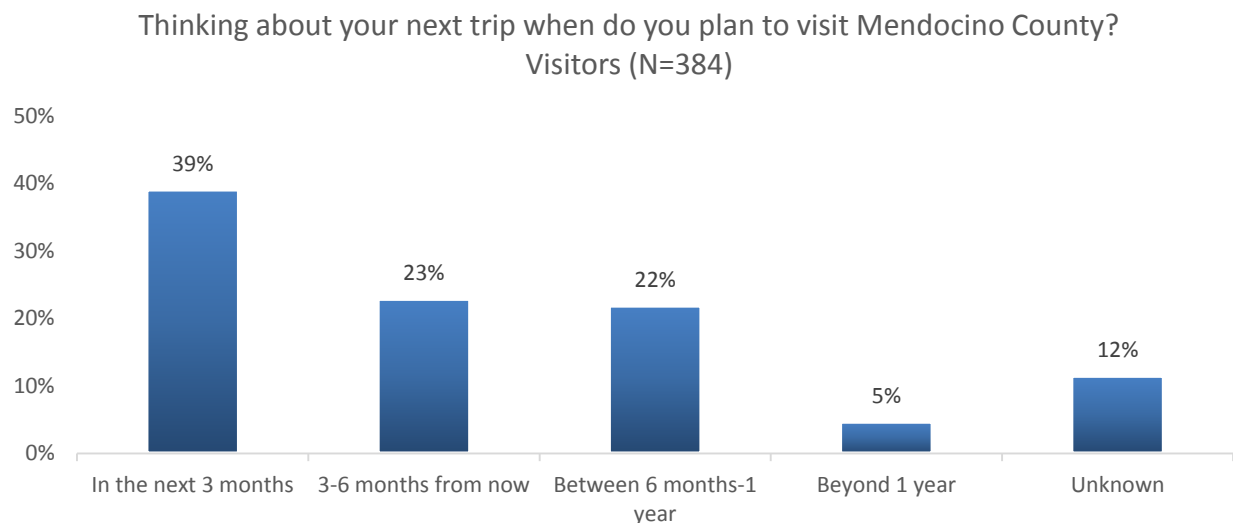
- However, they were much less likely to select many other activities, including:
  - “Wine and beer tasting” (33%, compared with 50% among other visitors)
  - “Fine dining” (36%, compared with 48% among other visitors)
  - Special events” (17%, compared with 30% among other visitors)
  - Fishing (11% compared with 24% among other visitors).

## Future Visits

### Next Visit Timeframe

Visitors indicated when they are most likely to visit Mendocino County again.

- 39% stated they would visit again in the next three months.
- This was followed by 23% who would visit in the next three to six months and 22% who will visit again in within six to 12 months.
- Less than 5% indicated that it would be more than a year before visiting again, and 12% were unsure of their next visit.
- Few differences existed among Fort Bragg visitors and other visitors.



## Perceptions of Fort Bragg

Mendocino visitors were asked a series of questions about their awareness of Fort Bragg.

### Agreement Ratings

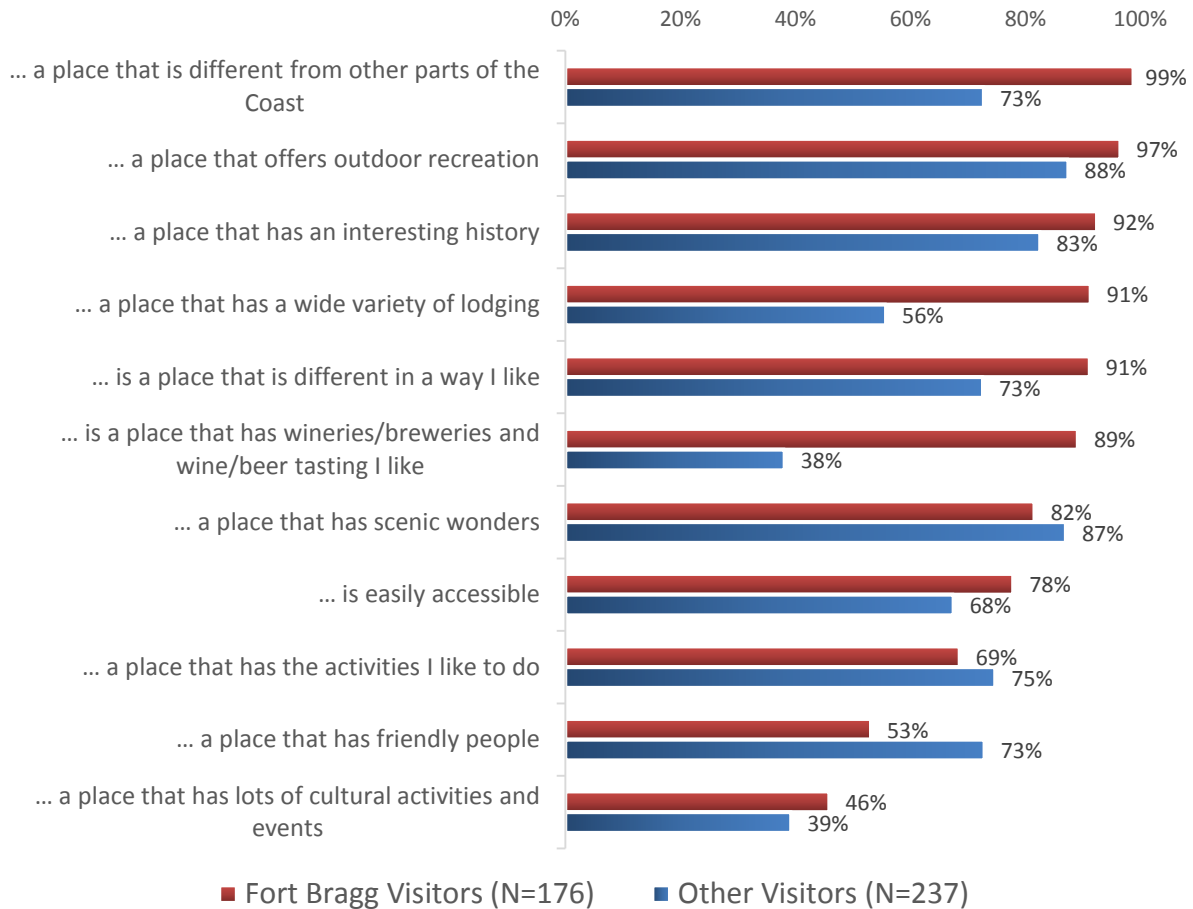
The survey gave visitors a series of statements about Fort Bragg, and asked them to indicate if they agreed, disagreed or were unsure whether they agreed with each statement.

- Nearly all (93%) of visitors agreed that Fort Bragg has scenic wonders.
- Most agreed that Fort Bragg offers outdoor recreation (92%), has an interesting history (87%), has activities they like (83%), has friendly people (82%), and is different in a way they like (81%).
- Visitors were less likely to agree that it has lots of cultural activities and events (46%) or wineries and breweries they like (42%).
- Fort Bragg visitors gave much higher agreement ratings to all statements compared with visitors who stayed elsewhere in Mendocino County.
- Agreement with the statement that Fort Bragg is a “place that has wineries/breweries and wine/beer tasting that I like” varied significantly: 89% of Fort Bragg visitors agreed, compared with only 38% among

other visitors. This difference is likely because the question included both beer and wine, and Fort Bragg offers a brewery but no winery.

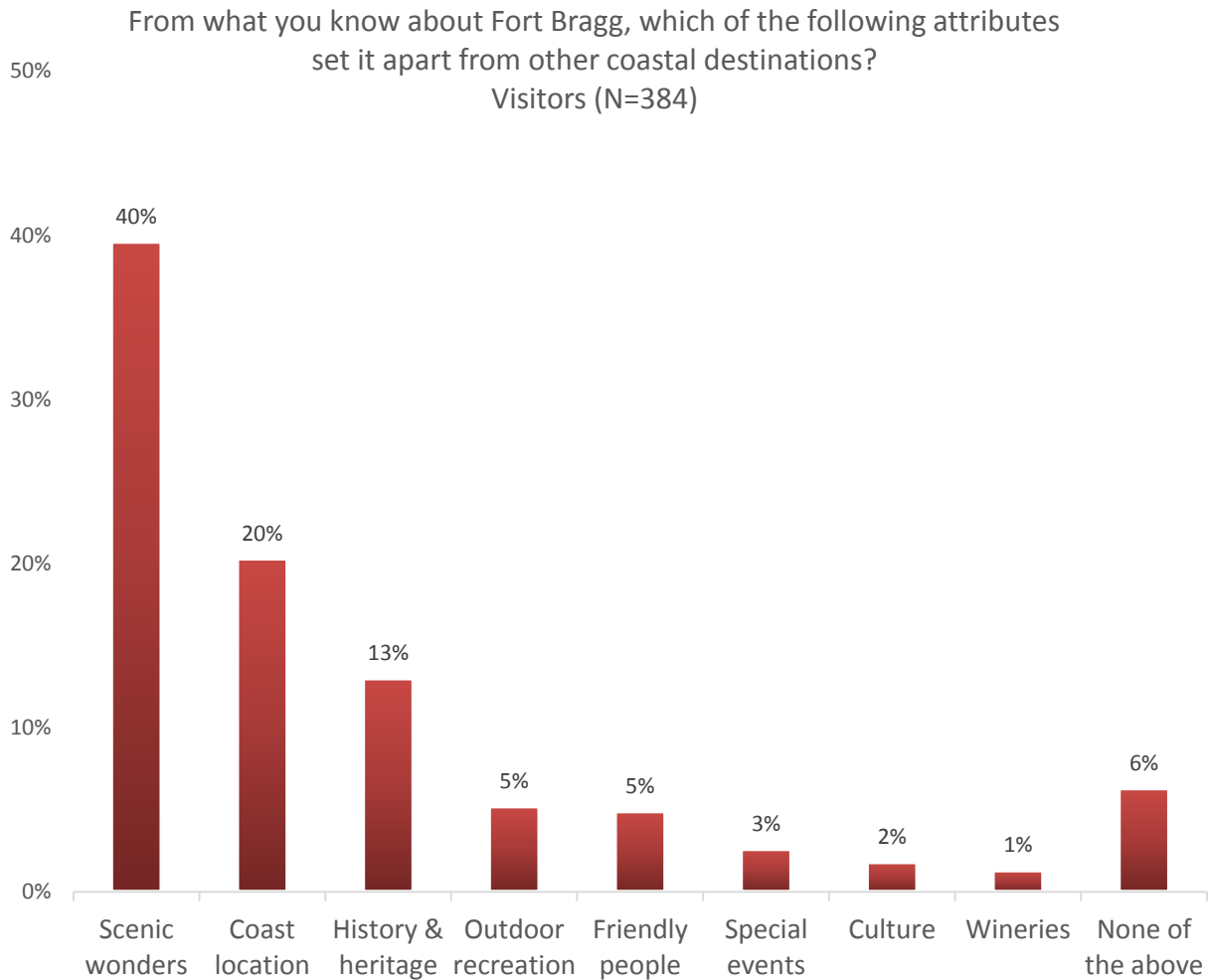
Thinking about your perceptions of Fort Bragg, to what extent do you agree with the following statements? Fort Bragg is a place that...

Visitors (N=384)



### Attributes that Set Fort Bragg Apart

- When asked which attributes set Fort Bragg apart from other coastal destinations, visitors were most likely to select “Scenic Wonders” (40%), followed by coast location (20%) and history and heritage (13%).
- Respondents were less likely to select special events (3%), culture (2%) and wineries (1%).
- Only 6% felt none of the attributes set Fort Bragg apart from other destinations.
- Answers were mostly consistent between Fort Bragg and other visitors.



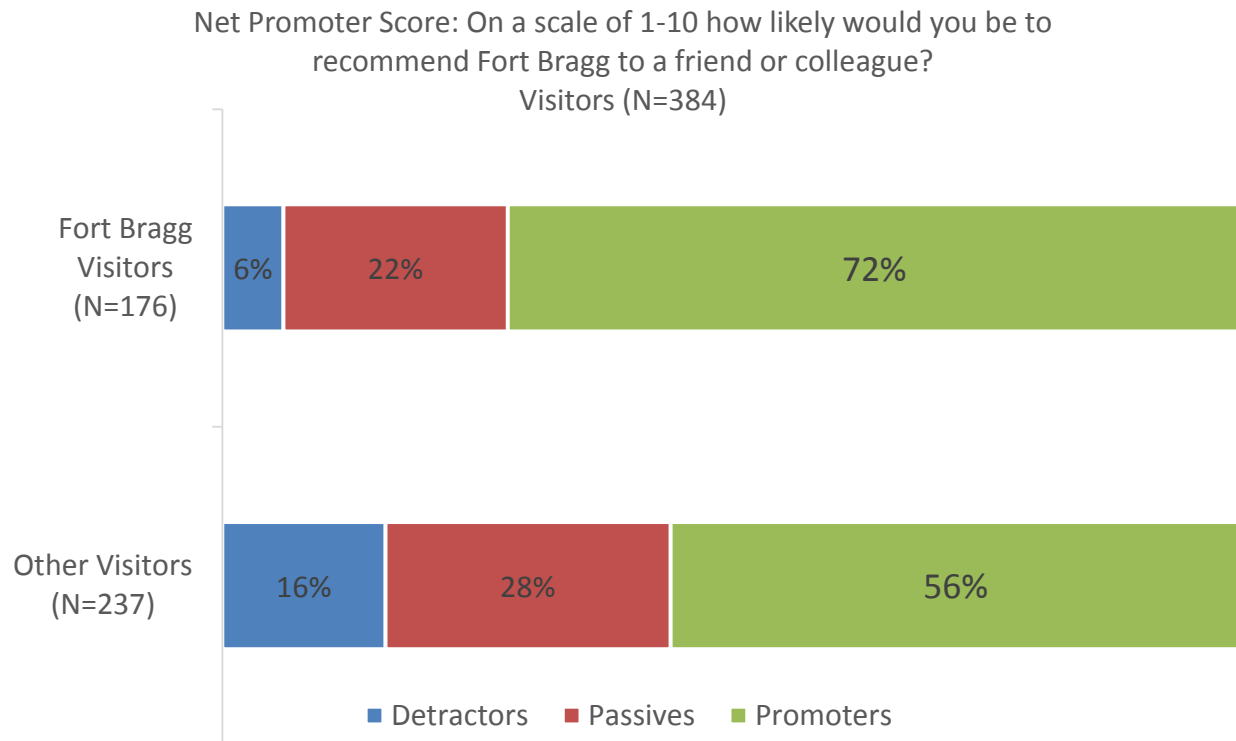
### Net Promoter Score

A net promoter score (NPS) is a metric for measuring loyalty of customer relationships. The survey measured NPS of Mendocino visitors by asking them to rate the likelihood of their recommending Fort Bragg to friends, family members or colleagues on a scale of 1 (not at all likely) to 10 (extremely likely).

Those providing a score of 1-6 are considered detractors, those providing a score of 7 or 8 are considered passives and those providing a score of 9 or 10 are promoters. The total NPS is determined by subtracting the percentage of detractors from the percentage of promoters.

- Based on this, Fort Bragg has an NPS score of 40.3 among all Mendocino County visitors.

- However, the Net Promoter Score increased to 66.0 among Fort Bragg visitors. This suggests that overall Fort Bragg visitors are enjoying their experience and are more likely to promote the destination than are overall visitors to the county.



## Non-Visitors

Respondents who had not visited Mendocino County were asked about their awareness and perceptions of Fort Bragg, as well as their likelihood of visiting.

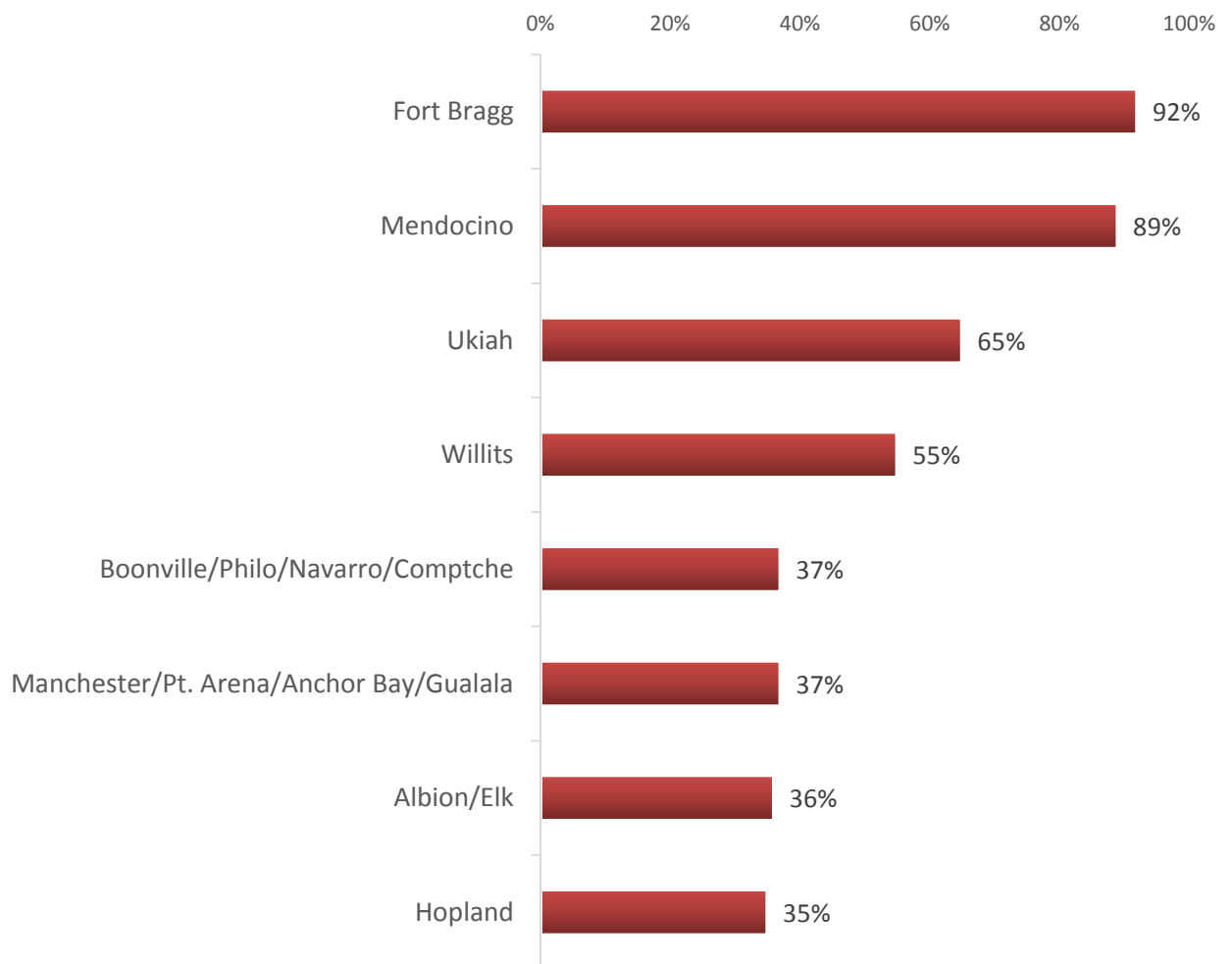
### Awareness of Mendocino County Locations

Non-visitors were asked to indicate their awareness of several Mendocino County locations.

- Fort Bragg was the most well-known Mendocino County location among non-visitors, with 92%, followed by Mendocino (89%).
- Most were also aware of Ukiah (65%) and Willits (55%).
- About a third of respondents were aware of other locations.

Thinking about places to visit in Mendocino County which of the following are you aware of? Select all that apply.

Non-Visitors (N=166)



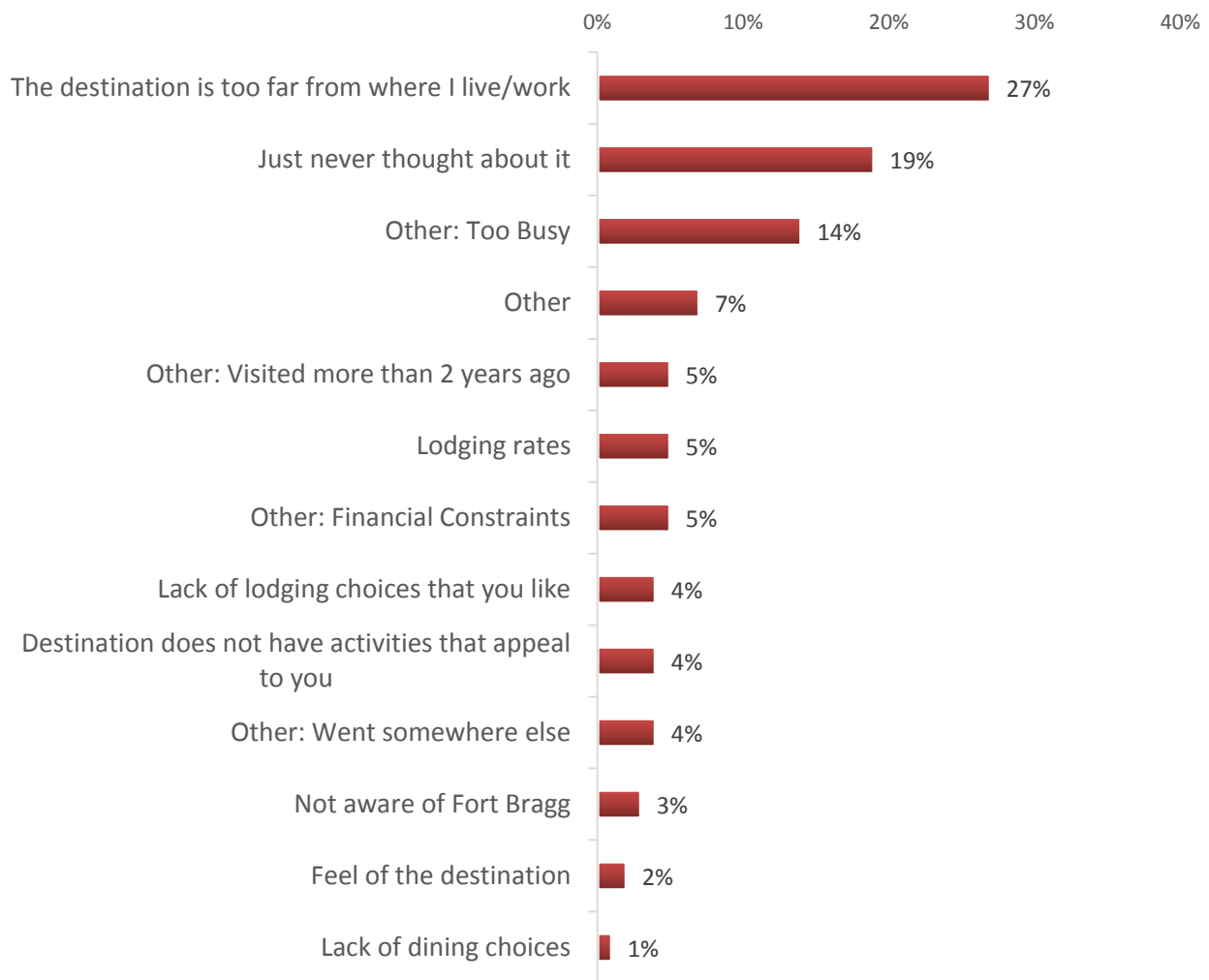
## Non-Visitor Reasons for Not Visiting Fort Bragg

## Agreement Ratings

- The most commonly-selected reason was that Fort Bragg is too far away (27%). Suggesting that driving to the destination be featured as part of the experience.
- Other commonly-cited reasons included never thought about (19%) and too busy (14%).
- Few respondents cited lack of dining choices (1%), feel of the destination (2%) or not being aware of Fort Bragg (3%).

Is there a specific reason you have not visited Fort Bragg?

Non-Visitors (N=166)



### Non-Visitor Perceptions of Fort Bragg

The survey asked non-visitors several questions to gauge their perceptions of Fort Bragg.

#### Agreement Ratings

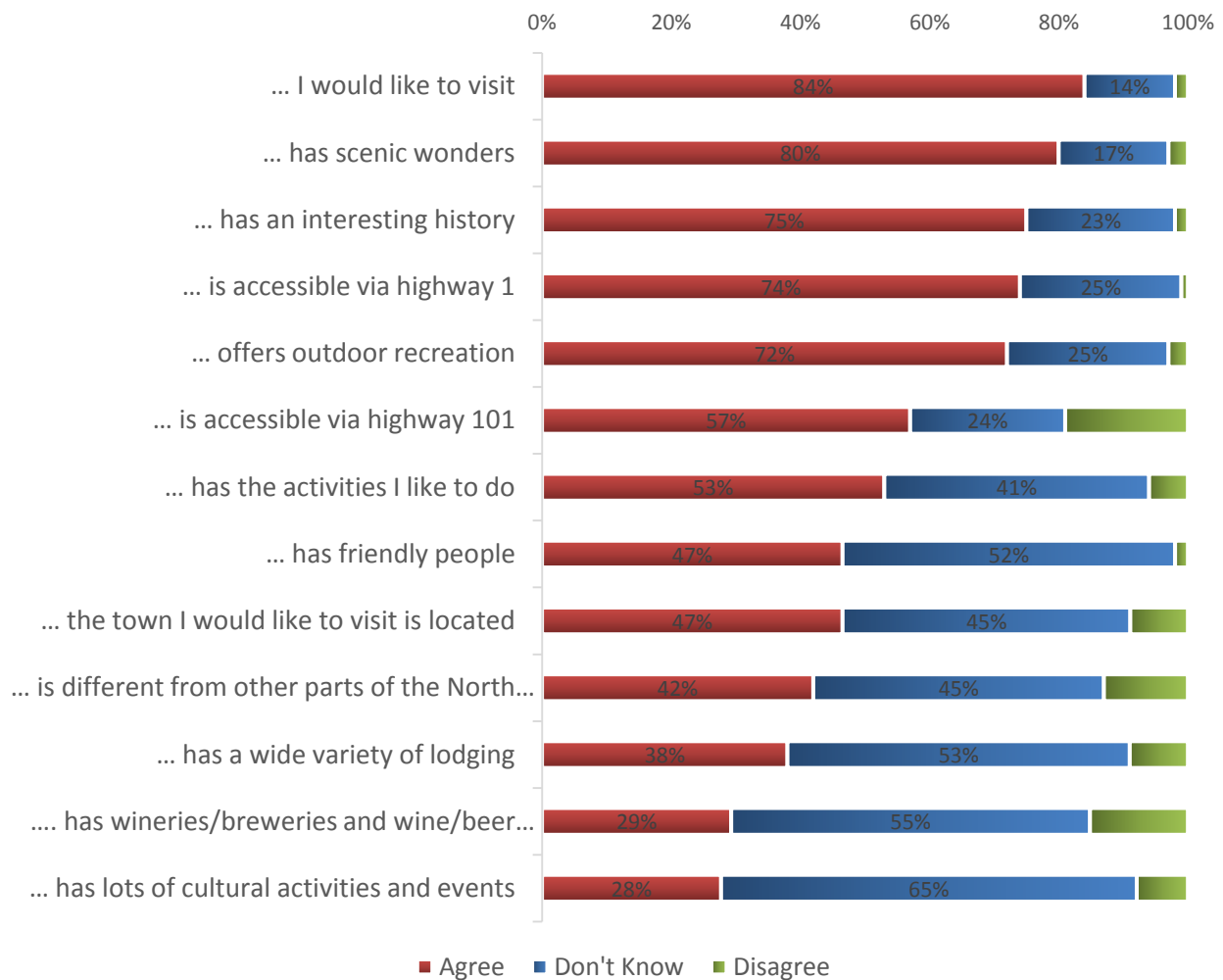
Non-visitors were asked whether they agreed with several statements about Fort Bragg.

- “Fort Bragg is a place I would like to visit” was the statement that received the highest agreement, with (84%) of non-visitors.
- Non-visitors also agreed with the same perceptions that visitors agreed with, namely that Fort Bragg has scenic wonders (80%), has an interesting history (75%) and offers outdoor recreation (72%).
- As with visitor respondents, fewer respondents agreed that Fort Bragg has wineries (29%) and cultural activities (28%).

Thinking about your perceptions of Fort Bragg, please indicate whether you agree or disagree with the following statements.

Fort Bragg is a place that...

Non-Visitors (N=166)



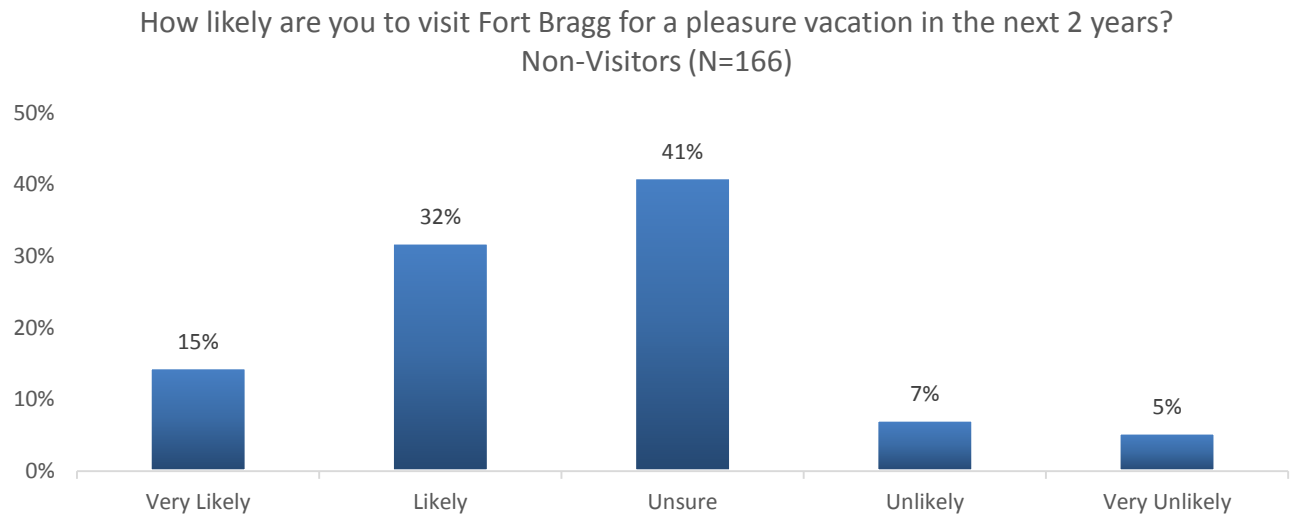


### Non-Visitor Future Visits

#### Likelihood of a Future Visit

The survey asked respondents how likely they were to visit Fort Bragg for a pleasure vacation in the next two years.

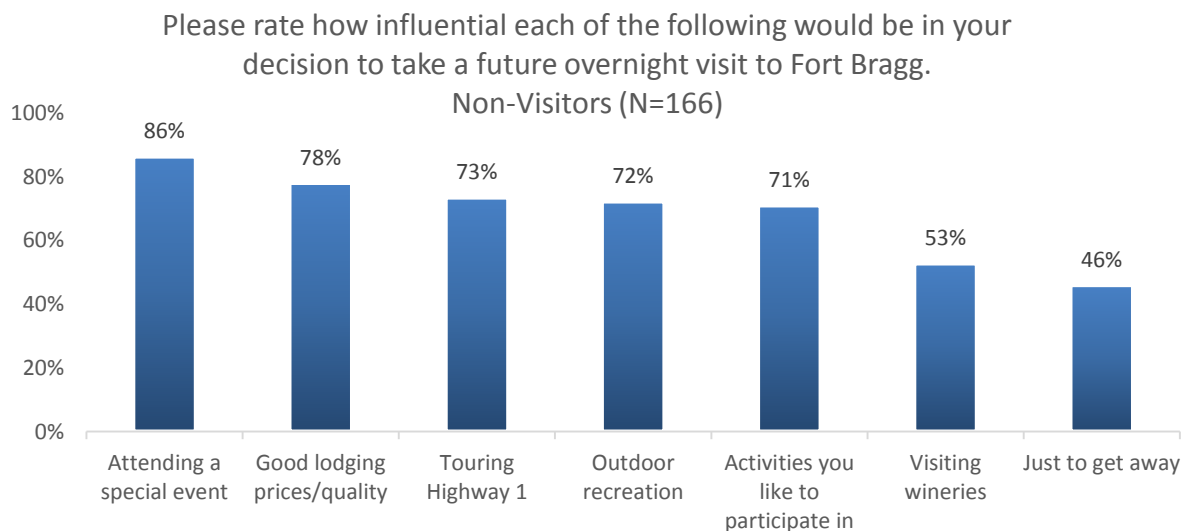
- Overall, about half (48%) of respondents stated that they were likely (32%) or very likely (15%) to visit.
- 41% were unsure.
- Only 12% stated that they were unlikely (7%) or very unlikely (5%) to visit.



### Influences on Future Visit

Non-visitors evaluated a list of several factors, and indicated how influential each would be in their decision to take a future overnight visit to Fort Bragg.

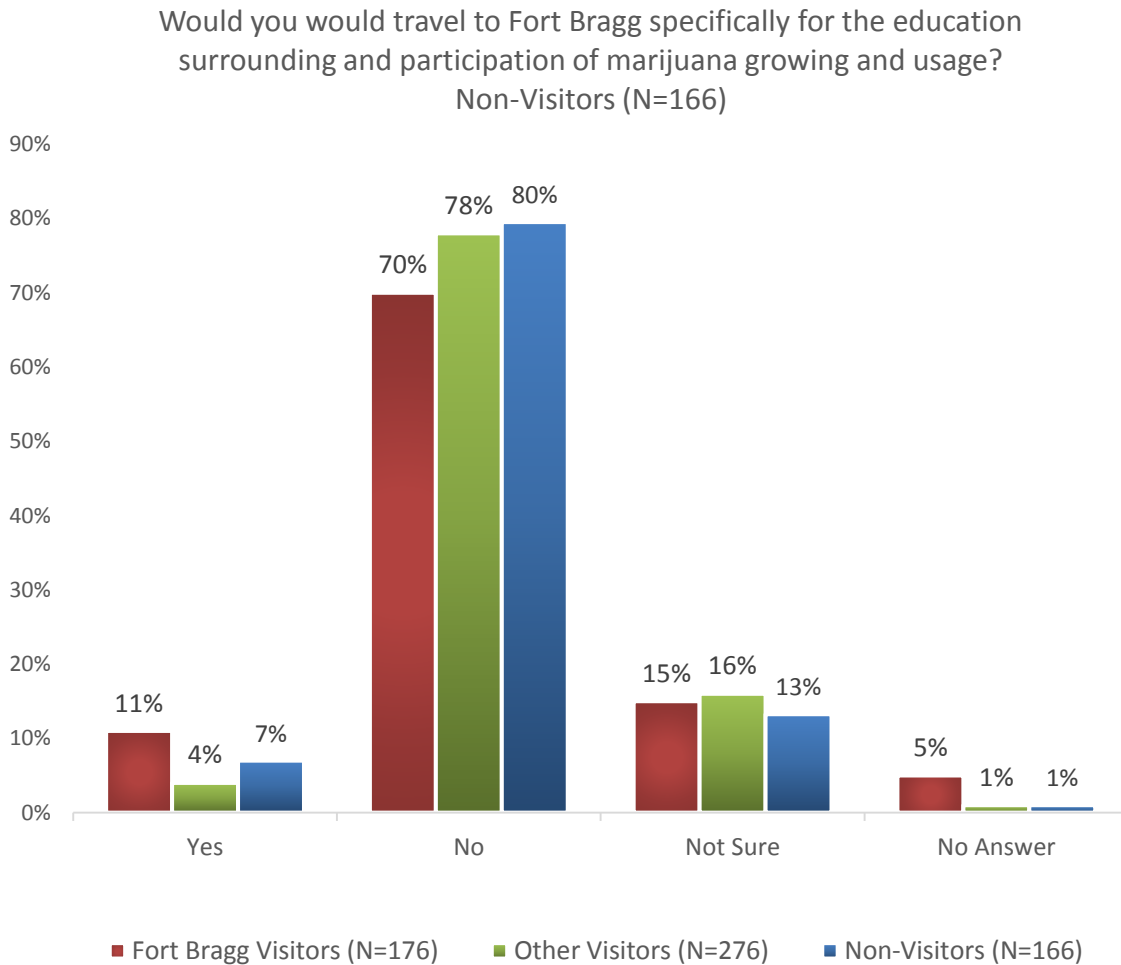
- Most (86%) stated that attending a special event would be very influential on their decision to visit.
- This was followed by good lodging prices and quality (78%), touring Highway 1 (73%), outdoor recreation (72%), and activities they like (71%).
- “Just to get away” had the lowest influence, with 46% of non-visitor respondents selecting it.



## Marijuana Education and Participation

The survey asked all participants to indicate whether they would travel to Fort Bragg specifically for education surrounding and participating of marijuana growing and usage.

- Overall, only 7% of respondents indicated that they would not travel to Fort Bragg for marijuana education and participation.
- Fort Bragg participants were least likely to travel specifically to Fort Bragg for marijuana education and participation (70%).



**Conclusions and recommendations:**

- Among non-visitors, Fort Bragg has the potential to increase visitation by emphasizing what makes Fort Bragg unique, the variety of Fort Bragg lodging options, and activities that visitors like to do, as these are the areas of disconnect between what the non-visitor knows and that the community offers to the visitor.

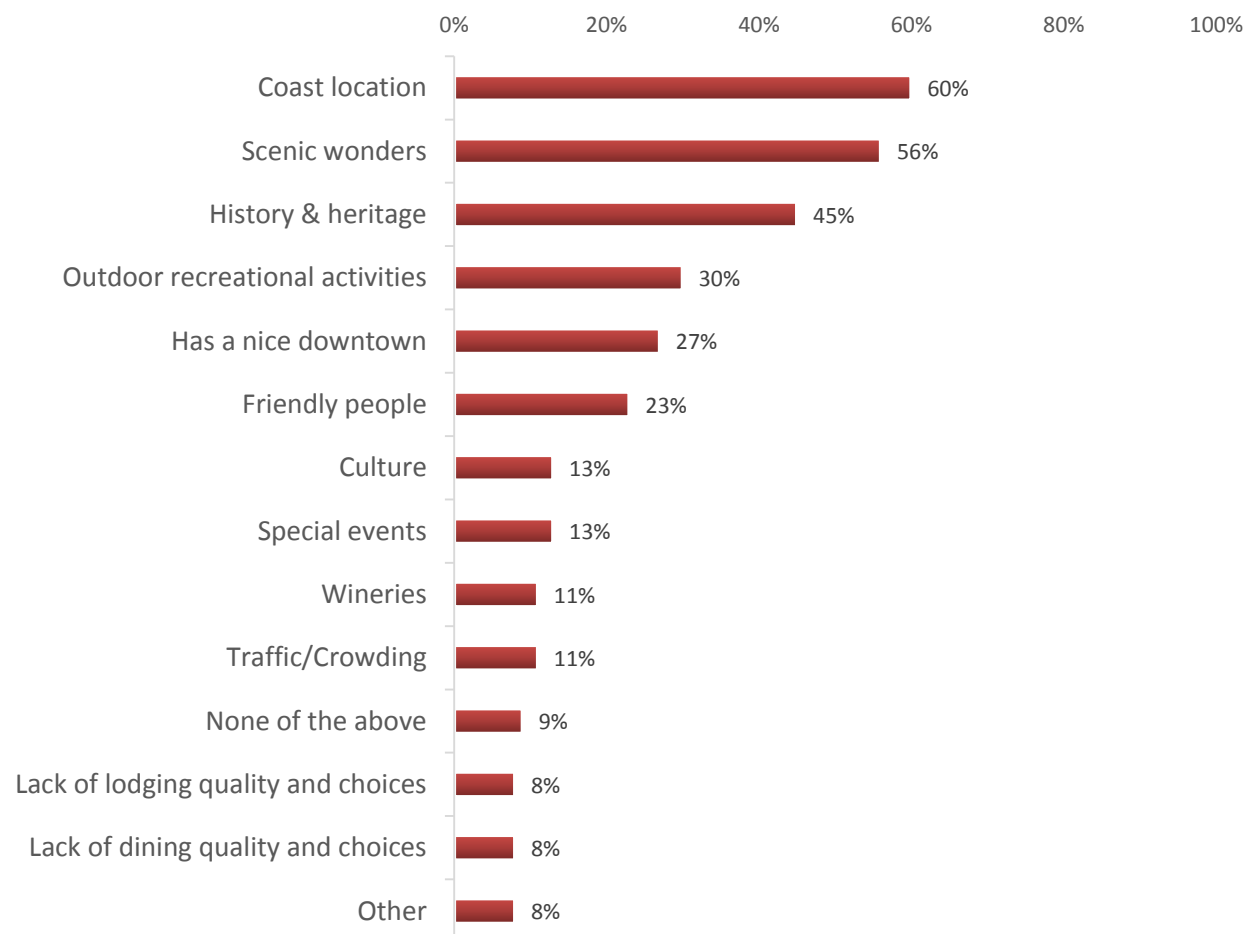
**Attributes that Set Fort Bragg Apart**

Non-visitors were asked which attributes set Fort Bragg apart from other coastal destinations.

- As with visitor respondents, “coastal location” (60%), “scenic wonders” (56%) and “history & heritage” (45%) were selected most often.
- Likewise, non-visitors tended to disagree with negative attributes, such as “lack of lodging quality and choices” and “lack of dining quality and choices” (8% each).

From what you know about Fort Bragg, which of the following attributes set it apart from other coastal destinations?

Non-Visitors (N=166)



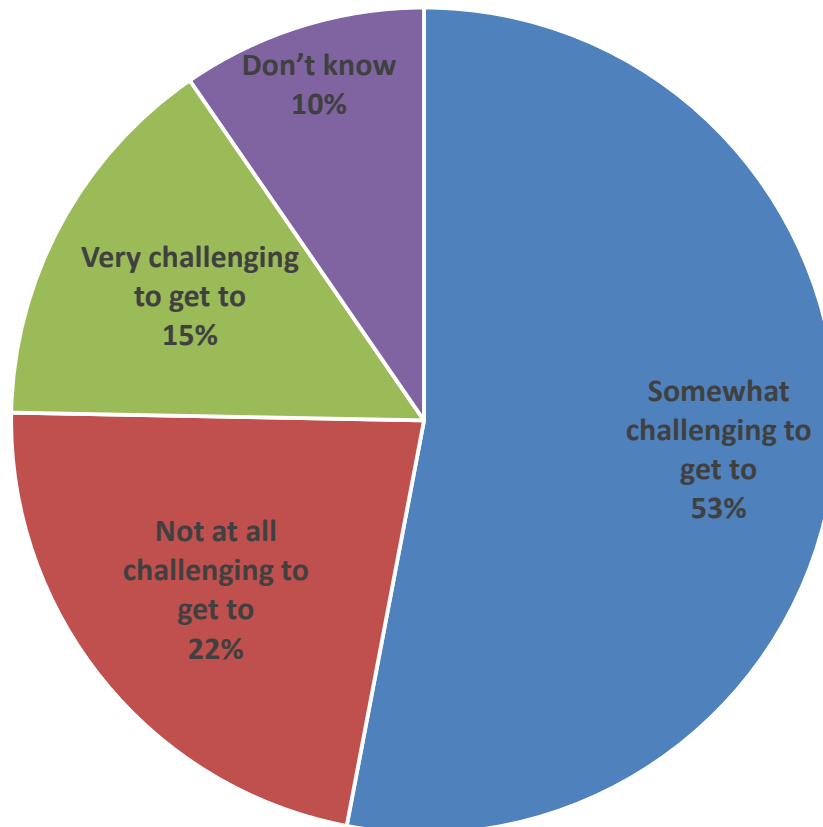
**Perceptions of Getting to Fort Bragg**

Non-visitors were asked how difficult they felt getting to Fort Bragg is, compared with other destinations they visit.

- Overall, 68% of non-visitors felt that Fort Bragg is somewhat (53%) or very (15%) difficult to get to compared with other destinations.
- 22% did not feel that getting to Fort Bragg was challenging at all.

Opportunity exists to position driving to the area as part of the vacation experience.

From your perspective how challenging is it to get to Fort Bragg compared to other destinations you visit?  
Non-Visitors (N=166)



- It's important to note that Fort Bragg is the largest visitor destination within the county. As such the Mendocino County marketing efforts overall increase the size of the market Fort Bragg stand to benefit the most based on the current share of the market. To this end the Fort Bragg marketing efforts are integrated with County marketing programs the better leverage fort Bragg can get with its marketing budget.
- Opportunity may exist mid-week during the high seasons. This would suggest focusing on group and meetings as well as longer stay destination visitors.
- In terms of adverting influence to visit the destination survey respondents overwhelming indicate referrals and articles with traditional TV, Radio and print have little influence. This would suggest developing content based strategy that is pushed through the established media platforms.

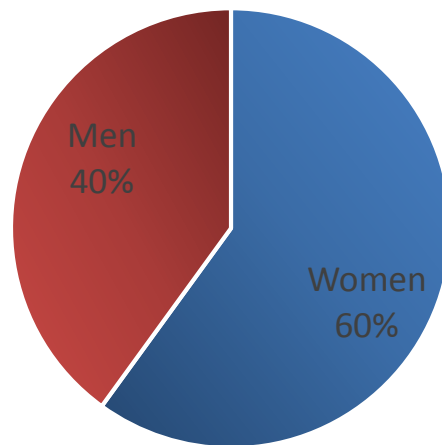
- In terms of destination attributes that influence visitors to visit the area natural elements like sightseeing, beaches, hiking and the state parks are rated highest followed by a variety of in town activities including fine dining, wine/beer tasting, museums/historical exhibits shopping and galleries.
- In considering non-visitors many see the destination in positive light but also the destination is perceived as too far. Messaging needs to be developed (i.e. “It’s a lot closer than you think”) focusing on the drive as part of the experience no matter which direction visitors may tend to enter the destination. The Fort Bragg adventure starts when you get on Highway 1 or Highway 20. This can be communicated with video and photos of some of the sights and experience a visitor can enjoy.
- The data also indicates that Fort Bragg visitors are very good promoters of Fort Bragg as such, harnessing these visitors through social media channels to promote the area offers a great opportunity to influence friends and families to visit.

## Respondent Demographics

### Gender

- The sample included 60% women and 40% men.

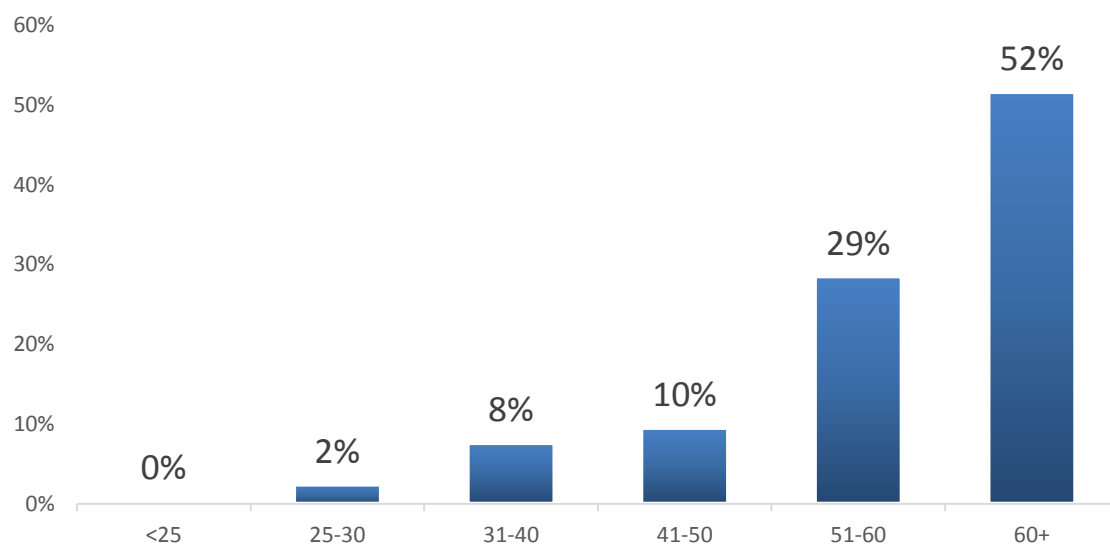
What is your gender?  
All respondents (N=550)



### Age

- About half of the sample (52%) were older than 60.
- Most other respondents were between 31 and 60.
- Only 2% of the sample were 30 years old or younger.

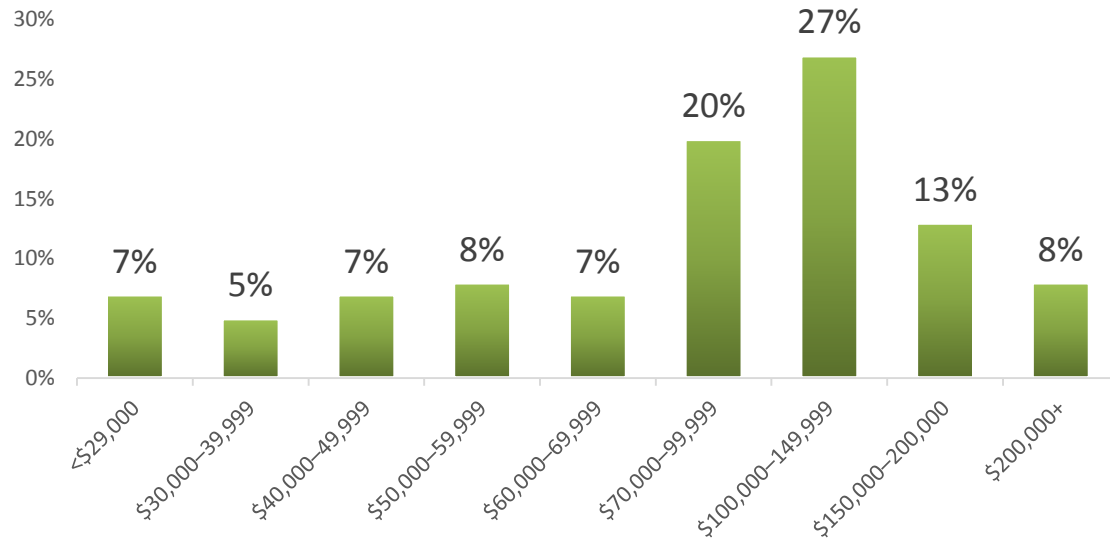
What is your age?  
All respondents (N=550)



### Income

- 60% of respondents reported an income of between \$70,000 and \$200,000 annually.

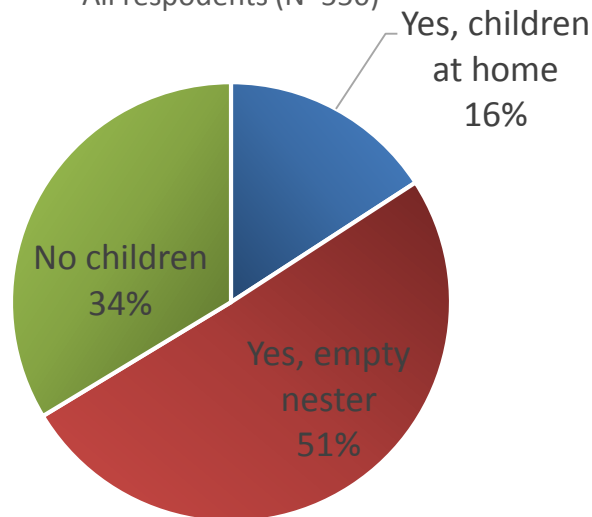
What is your annual household income?  
All respondents (N=550)



### Family Status

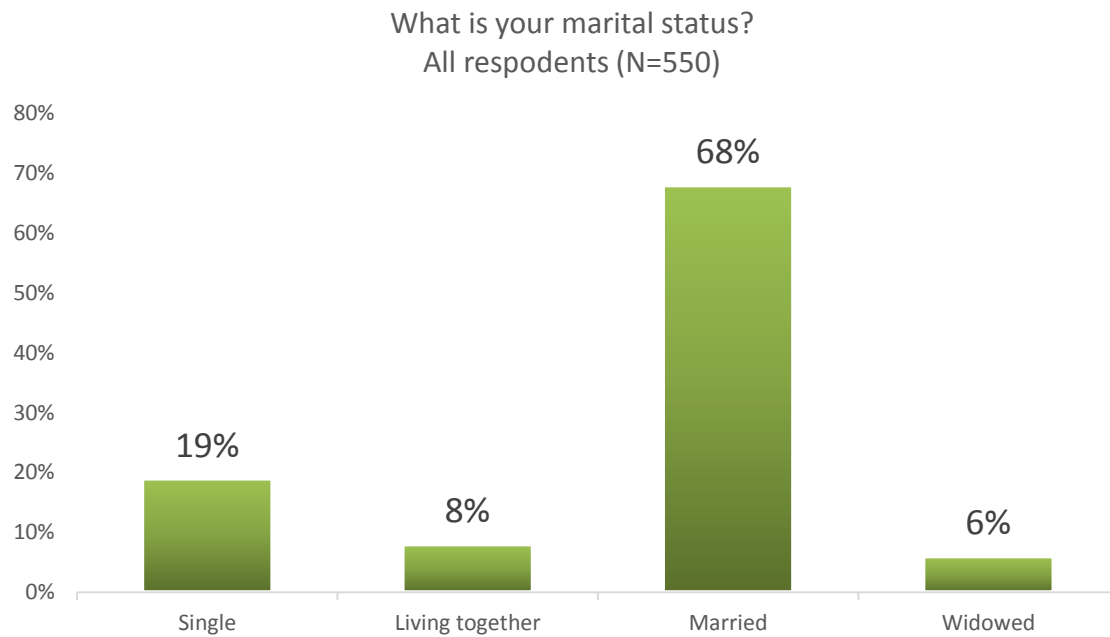
- About half of respondents (51%) reported being empty nesters, followed by 34% who did not have children.
- 16% had children at home.

Do you have children?  
All respondents (N=550)



### Marital Status

- About two-thirds of respondents (68%) were married, and an additional 8% were living together.
- 19% were single, and 6% were widowed.



### Race/Ethnicity

- Most respondents indicated that they were Caucasian (82%).
- 7% each stating Asian American and "other."

