



# Visit Mendocino County

**Brand Research Survey – Aided and Unaided Sentiment**



# Why Did We Undertake These Surveys?

As part of a comprehensive approach to understanding Mendocino County's place in the larger travel landscape, we chose to undertake targeted research focusing on four major markets (both established and with growth potential) to assess both the current sentiment surrounding Mendocino County, and our 'top of mind' placement amongst potential travelers.

We wanted to capture a broad swath of the population, using both in-person surveys and digital surveys, in diverse neighborhoods, and both with and without prompting. We were curious how these target markets perceived Mendocino County as a travel destination for various types of travel, as well as if Mendocino County was a 'top three' destination for any of those types of travel. These insights give us actionable information about our target markets – where we can leverage high favorability to promote specific niche travel, and where we have the most opportunity to grow our presence simply by 'joining the conversation'.

# How Did We Collect Data?

We touched our survey audience both in the real world and online, to have the broadest spectrum of respondents that we could. Ultimately roughly 62% of our responses came from in-person questions, while 38% came from online surveys.

In person we utilized locals in each region to approach people and ask them if they would take a brief two-minute survey. Our questioners were instructed not to guide the answers in any way – which meant some of our responses ended up being unusable. For example, we restricted our questioning to California destinations as answers, but many people ignored that and gave other states or even countries as responses; a handful of people gave a single answer rather than three; some people missed the intent of the question entirely (giving the answer ‘home’, for example, rather than a region or city). These answers were eliminated from the final measurement, but other, appropriate answers were still kept for that respondent (their entire survey was not discarded for one faulty response). Online we used Qualtrics to reach people who resided in each of our target markets, capturing an even distribution of age/gender.

We kept the question suite short – for the aided questionnaire a simple rating matrix; for the unaided questionnaire seven different trip types asking for a ‘top three’. Many respondents did not give the full three for every answer. For all respondents we asked how many leisure trips they took annually and their home zip code. This kept us to a reasonable length, and maximized completion (fewer than 15 respondents failed to complete our in-person surveys). Once complete we asked respondents if they would be willing to answer some demographic questions (marital status, children, employment, income, age, gender) – fewer than 50% answered these in person, while the majority online provided this additional information, leading to an incomplete picture but giving us enough information to be confident in the diversity of our respondents.



# Where Did We Collect Data?

We surveyed in four target markets that we see as of major importance to Mendocino County as a destination: the San Francisco Bay Area, the Sacramento area, the Los Angeles area, and Southern Oregon. Within these markets we tried to collect in a diversity of neighborhoods and zip codes, gathering survey responses outside grocery stores, retail stores, neighborhood fairs, farmers’ markets, and post offices.

We also used Qualtrics to extend our reach to those who may not have been adequately represented in physical collection (whether because they did not frequent physical locations, or did not wish to participate in surveys physically).

In all cases we attempted to collect at least 100 responses for each region, for both aided and unaided surveys. In most cases we far surpassed that – Southern Oregon did prove to be somewhat challenging, with a much more reticent cohort that was generally unwilling to answer survey questions, as well as smaller population centers that made gathering signatures especially time consuming.

## ***Total Aided Respondents (804)***

San Francisco Bay Area	236
Sacramento Area	286
Southern Oregon	102
Los Angeles Area	180

## ***Total Unaided Respondents (1092)***

San Francisco Bay Area	252
Sacramento Area	281
Southern Oregon	207
Los Angeles Area	352



## Aided

Aided brand awareness is a measurement of how well a brand is recognized, and aided brand sentiment asks respondents directly about sentiment associations with a specific brand. At the outset we filtered out potential respondents based on if they knew of Mendocino County as a travel destination – those who didn't were not surveyed.

In our case we used aided surveys to ask residents of our target markets how positive their sentiment was toward Mendocino County as a destination, when thought of in relation to a specific type of travel.

This gives us data on how well we are perceived in our target markets by those who already know about us, as a choice for those who want a Coastal, Wine, Cannabis, Outdoor, Nature, Luxury, or Value destination.

## Unaided

Unaided brand awareness asks respondents, without prompting, to come up with brands fitting criteria, to see how much brand saturation there is. In our case we did screen this by asking how many leisure trips respondents took each year – those who didn't travel at least annually were not surveyed.

We then asked respondents to list their top three destinations in California when they thought of a specific type of travel.

This allowed us to measure how top-of-mind Mendocino County is for these types of travel in our target market. It also paints a picture of who our primary competition within California is – this 'top three destination' space is a valuable place to inhabit, and one we want to continue to grow into through our marketing efforts in our target markets.



# Aided Survey

- How many leisure trips do you take each year?
- Please rate Mendocino County as a Coastal Getaway travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’
- Please rate Mendocino County as a Wine-Tasting travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’
- Please rate Mendocino County as a Cannabis travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’
- Please rate Mendocino County as an Outdoor Adventure travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’
- Please rate Mendocino County as a Nature/Wildlife travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’
- Please rate Mendocino County as a Luxury travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’
- Please rate Mendocino County as a Value-Oriented travel destination in California. Use a scale of 1 to 5, where 1 means ‘not at all appealing’ and 5 means ‘the best destination in California for this type of travel.’

# Unaided Survey

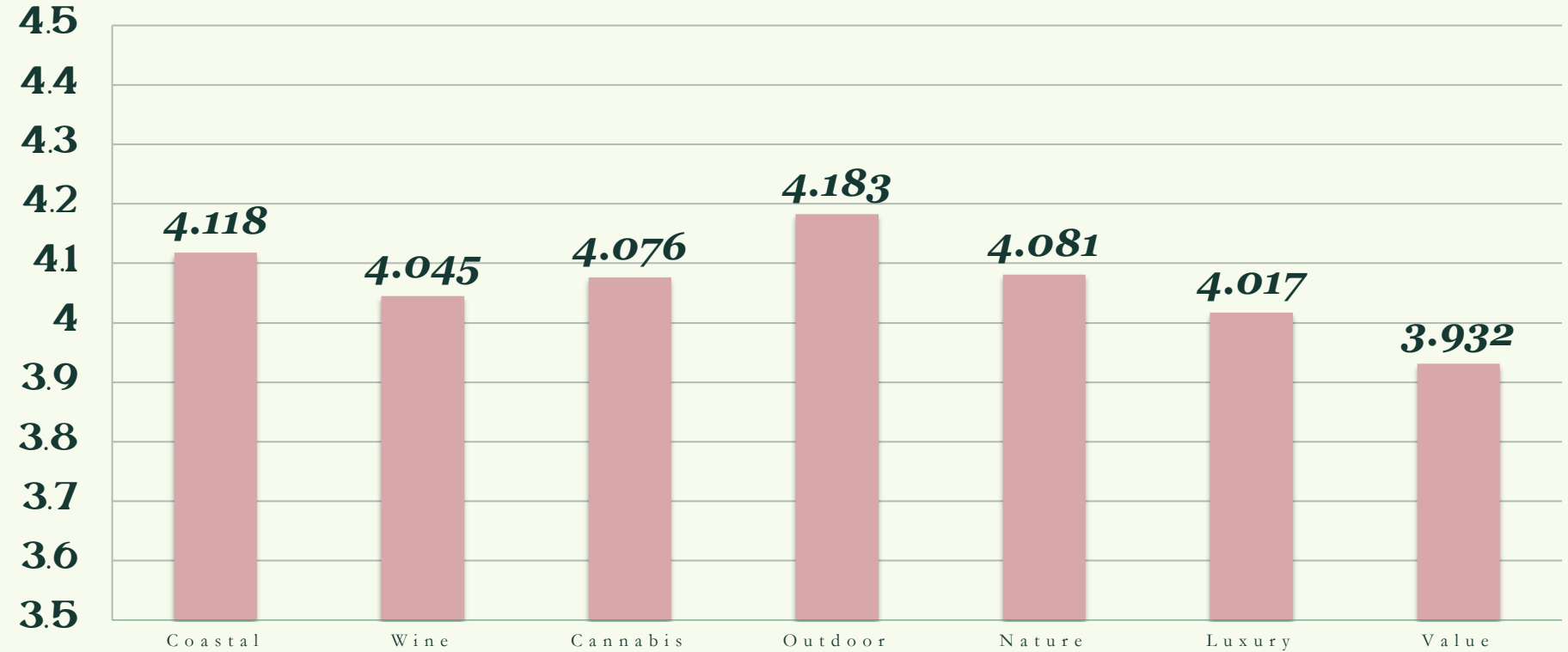
- Do you know of Mendocino County as a travel destination?
- How many leisure trips do you take each year?
- What are your top three destinations when you think of a coastal vacation you'd want to take in California?
- What are your top three destinations when you think of a wine-tasting vacation you'd want to take in California?
- What are your top three destinations when you think of a cannabis vacation you'd want to take in California?
- What are your top three destinations when you think of an outdoor adventure vacation you'd want to take in California?
- What are your top three destinations when you think of a nature and/or wildlife vacation you'd want to take in California?
- What are your top three destinations when you think of a luxury vacation you'd want to take in California?
- What are your top three destinations when you think of a value-oriented vacation you'd want to take in California?

## Top Level Takeaways.

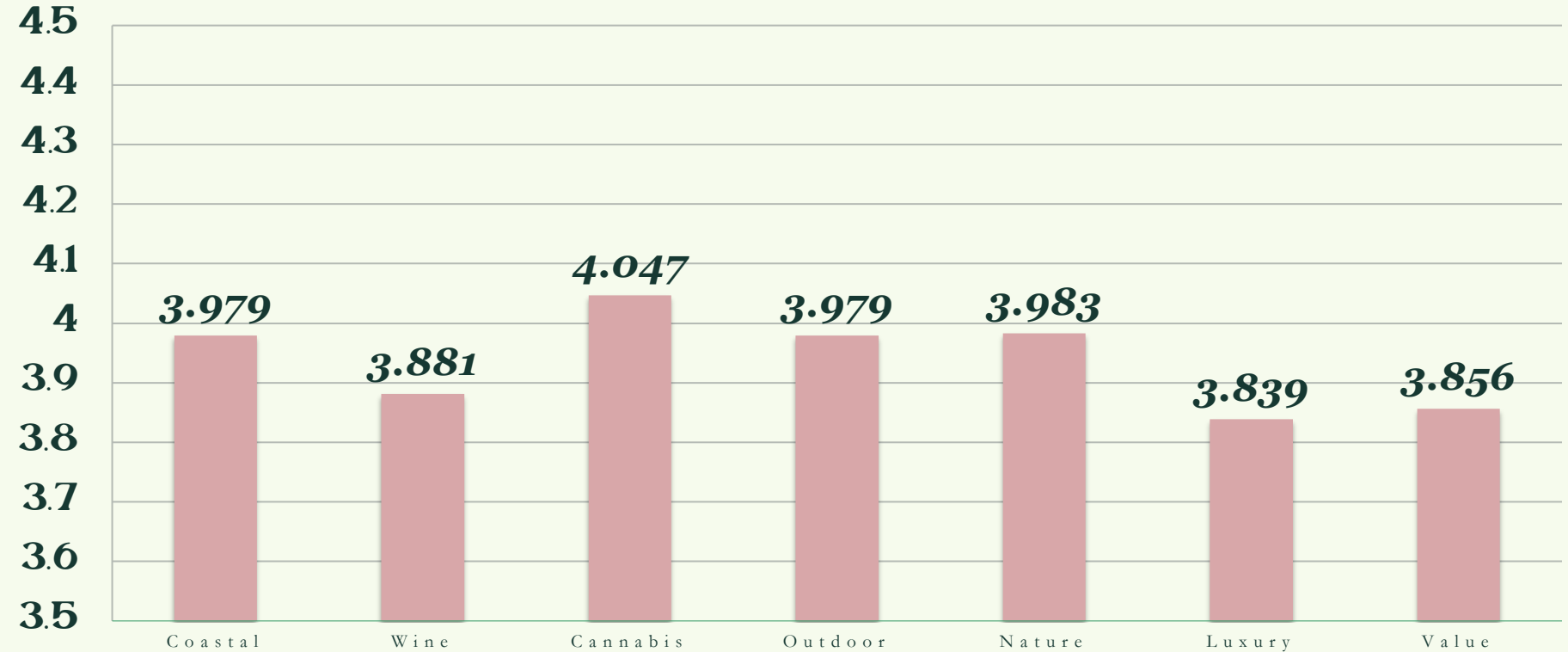




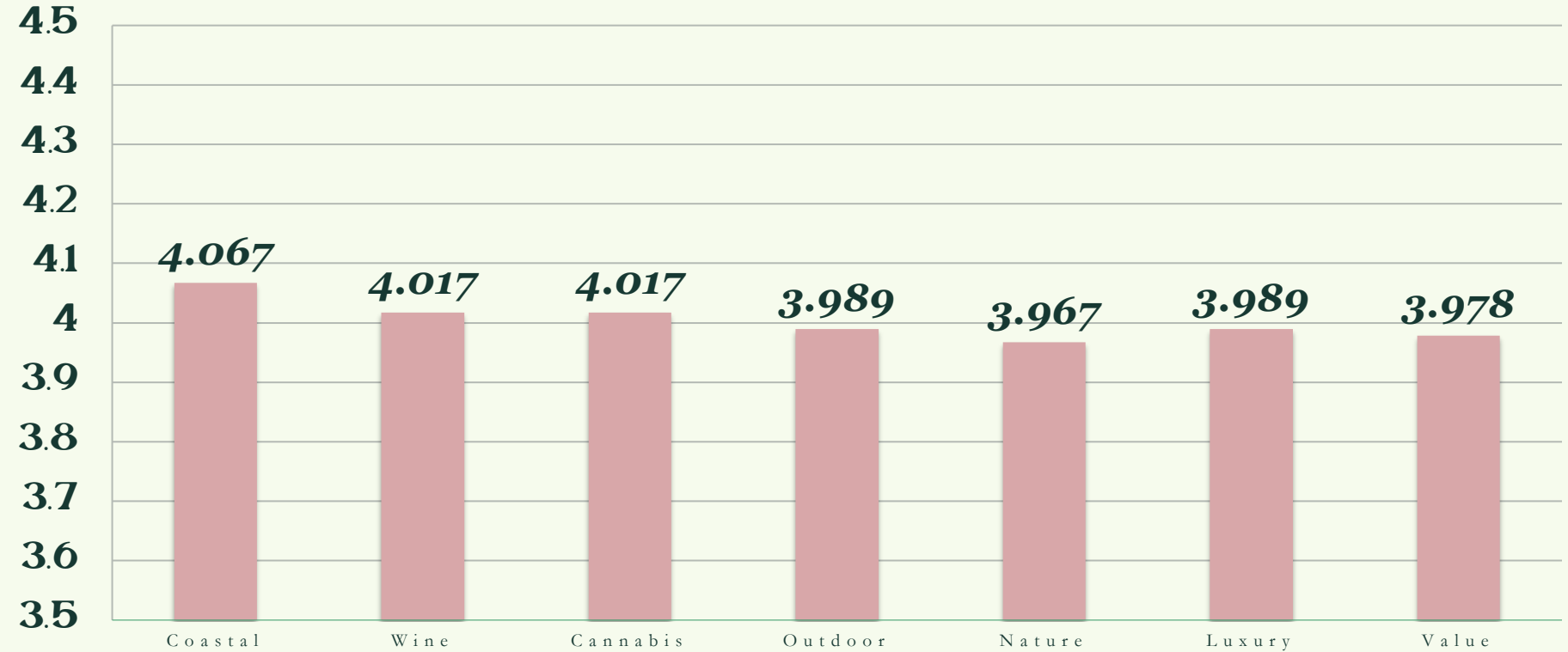
## Sentiment Averages in All Markets



## Sentiment Averages in the Bay Area



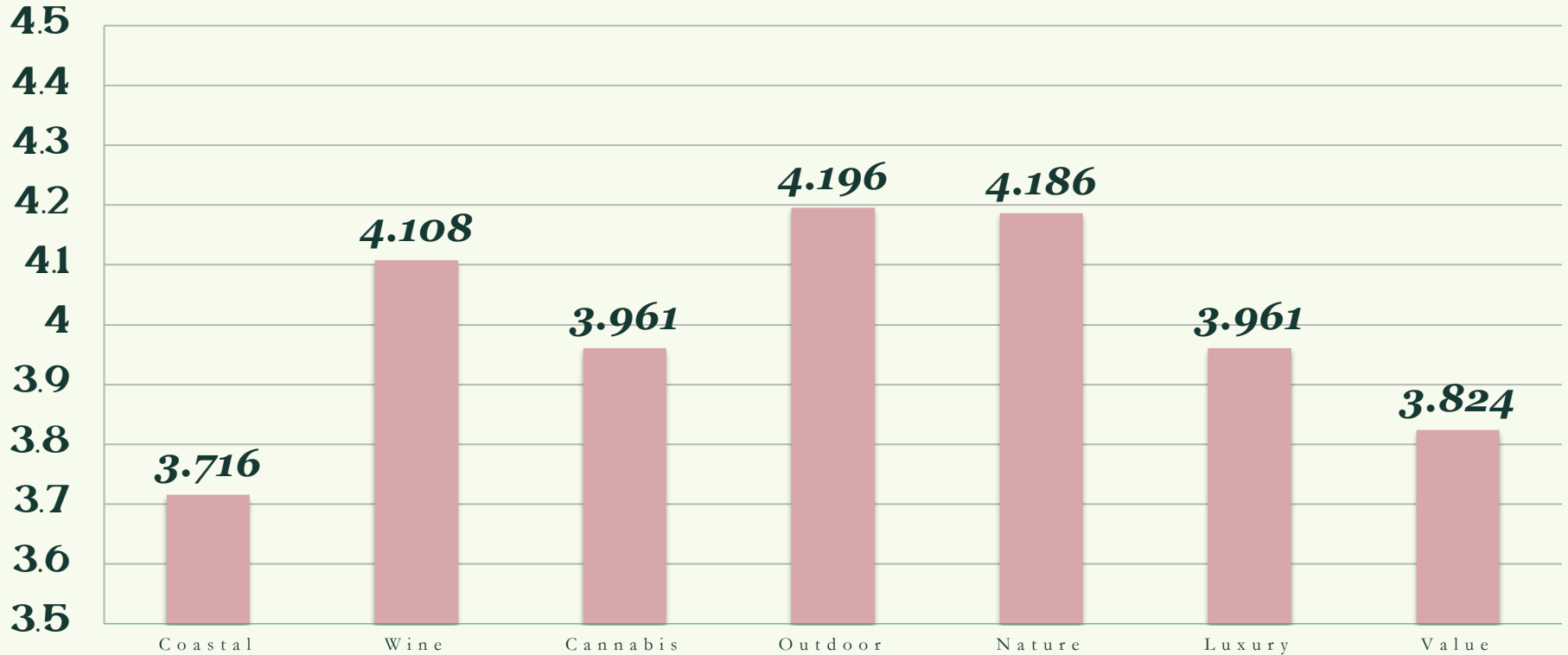
## Sentiment Averages in Los Angeles



## Sentiment Averages in Sacramento



## Sentiment Averages in Southern Oregon

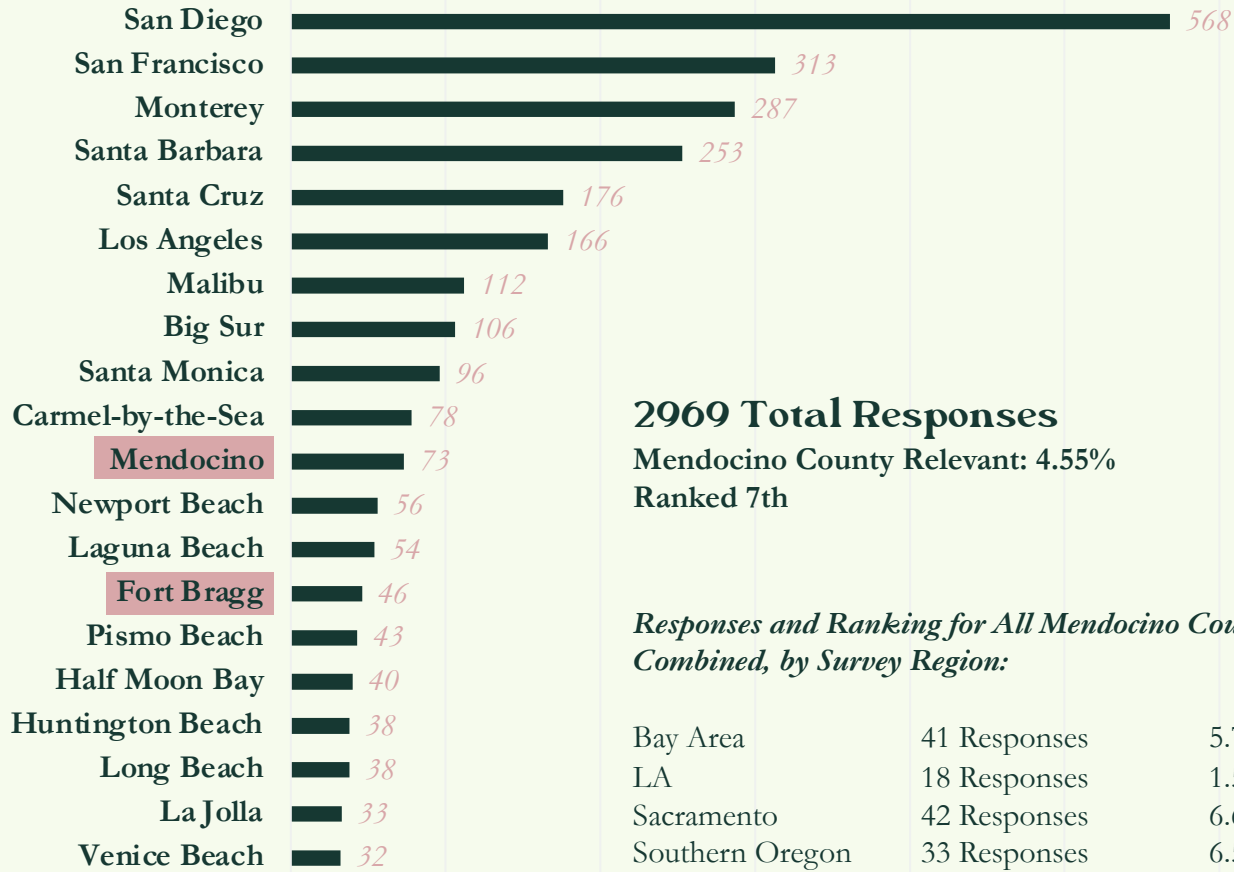


# Unaided Top Destinations for Coastal Vacations in California

Coastal vacation spots were as expected overall, with Mendocino County performing quite well in unaided recall. San Diego dominated the results, topping the list in every region except Sacramento (where Monterey had slightly more selections).

Both “Mendocino” and “Fort Bragg” performed well, coming in the top 20 results. “Glass Beach” (9 responses) and “Point Arena” (7 responses) both made showings as well. Los Angeles pulled the overall rankings down, with neither “Mendocino” (11 responses, 22<sup>nd</sup> ranking) or “Fort Bragg” (7 responses, 25<sup>th</sup> ranking) breaking the top 20, as Angelenos prioritized more regional destinations (Laguna Beach, Newport Beach, Pismo Beach, Malibu, etc.).

**Top 20 Responses:** *What are your top three destinations when you think of a coastal vacation you'd want to take in California?*



**2969 Total Responses**

**Mendocino County Relevant: 4.55%**  
**Ranked 7th**

*Responses and Ranking for All Mendocino County Responses Combined, by Survey Region:*

Bay Area	41 Responses	5.72%	8th
LA	18 Responses	1.57%	15th
Sacramento	42 Responses	6.65%	5th
Southern Oregon	33 Responses	6.55%	6th



# Unaided Top Destinations for Wine-Tasting Vacations in California

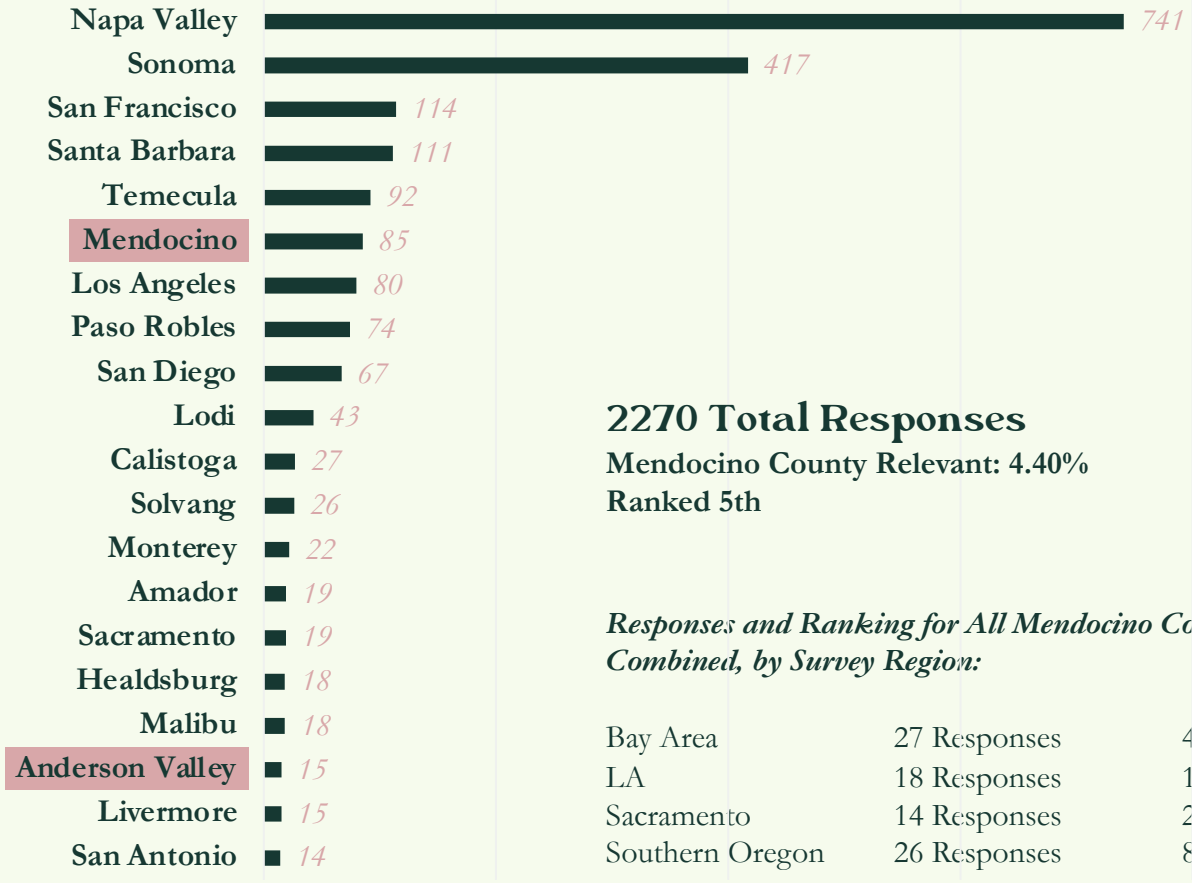
No surprise here that Napa Valley dominated the responses across all of our survey regions. A bit more surprising that many respondents did not seem to associate a ‘wine tasting vacation’ with an actual wine-producing region. For many people just visiting a city or region with high-end tasting bars and restaurants was enough to qualify.

There was some regional effect as well – Temecula was top-of-mind for many Angelenos, for example, while barely making a showing for any of the other three survey regions. Southern Oregon did give Mendocino County quite a bit of love though, with it being mentioned almost 9% of the time!

Mendocino (and the Anderson Valley) still made a strong showing here overall, landing 5<sup>th</sup> combined (after Napa, Sonoma, SF, and Santa Barbara).



**Top 20 Responses:** *What are your top three destinations when you think of a wine-tasting vacation you'd want to take in California?*



**2270 Total Responses**

Mendocino County Relevant: 4.40%

Ranked 5th

*Responses and Ranking for All Mendocino County Responses Combined, by Survey Region:*

Bay Area	27 Responses	4.39%	4th
LA	18 Responses	1.58%	15th
Sacramento	14 Responses	2.81%	6th
Southern Oregon	26 Responses	8.91%	4th

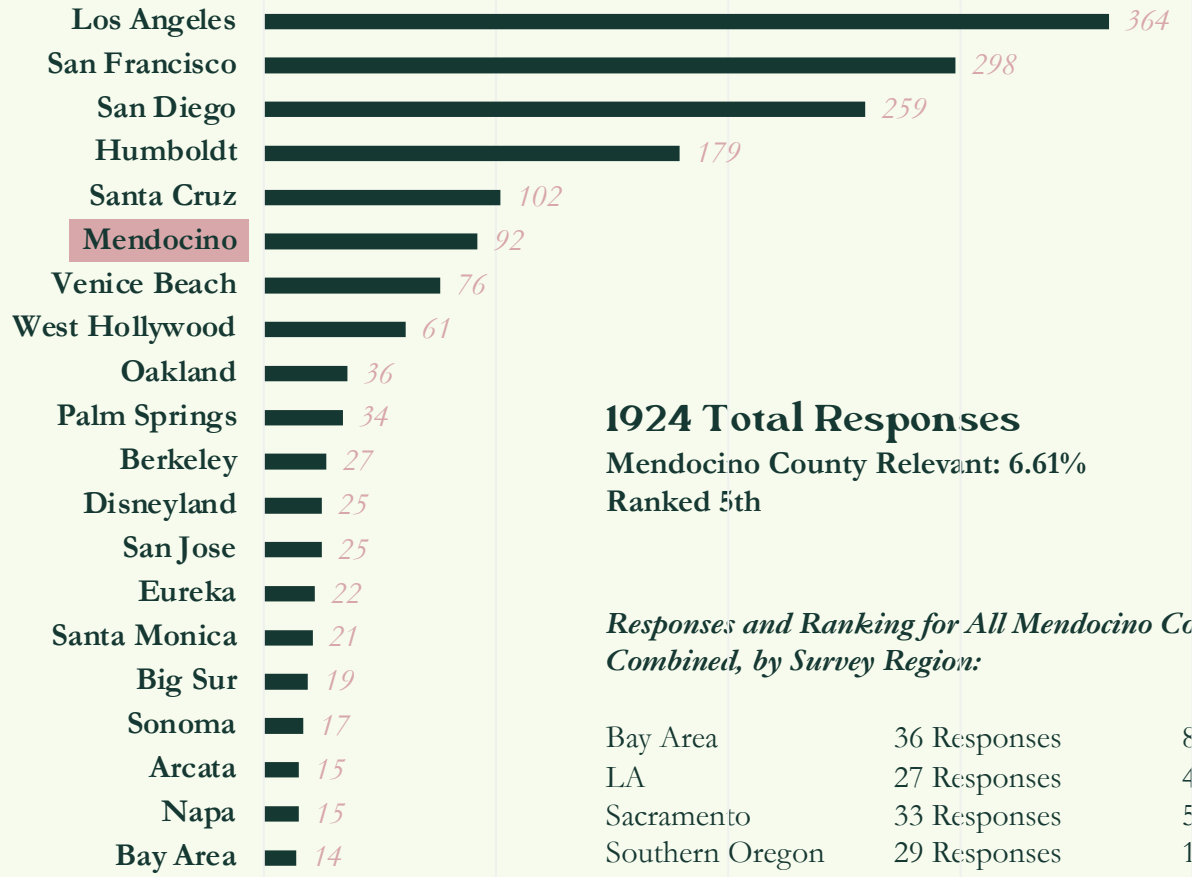


# Unaided Top Destinations for Cannabis Vacations in California

As with wine, many respondents here opted for a major city with an active dispensary culture, rather than a producing region. Mendocino County still came in a fairly strong 5<sup>th</sup> showing. A few specific businesses were called out by one or two people – Emerald Farm Tours, Mendocino Magic, and Emerald Pharms – and were included in the Mendocino County totals. Both Willits and Hopland were also individually called out by a few people.

We had an especially strong showing with both Southern Oregon and the Bay Area, but even in LA and Sacramento our relative mind-share was higher than in many other categories.

**Top 20 Responses:** *What are your top three destinations when you think of a cannabis vacation you'd want to take in California?*

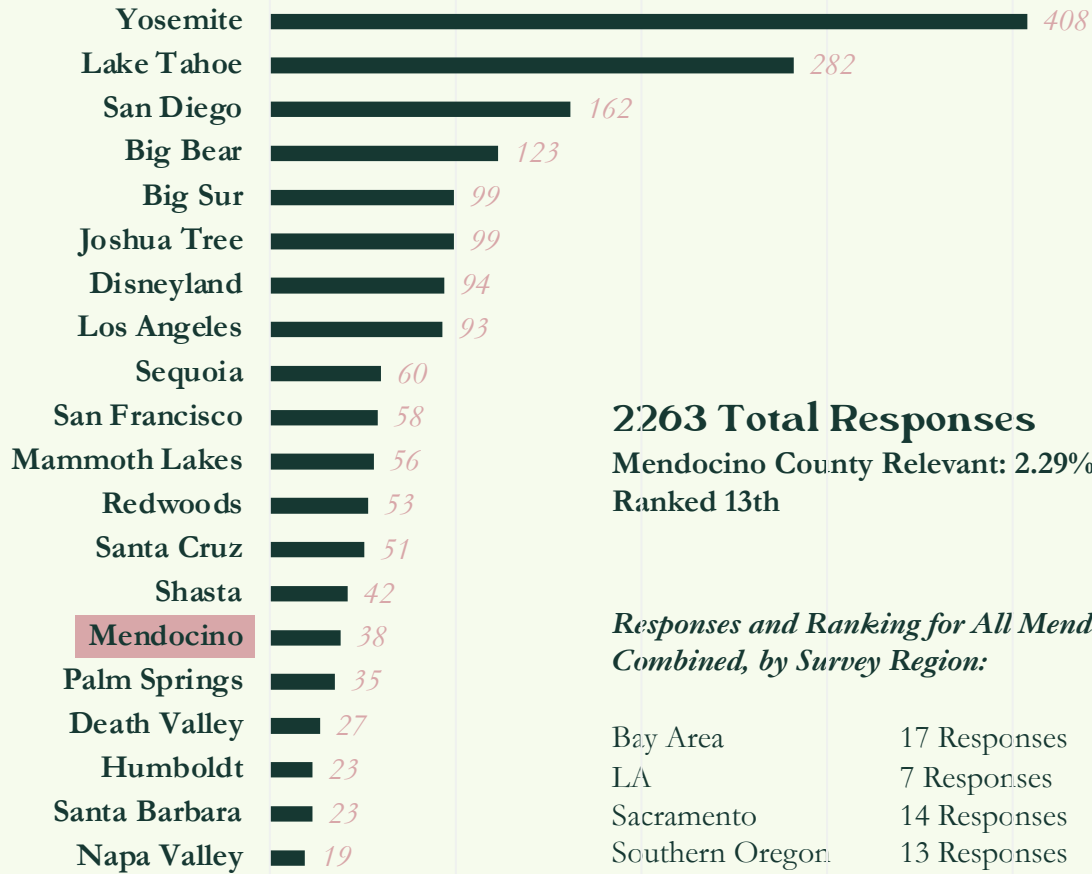


# Unaided Top Destinations for Outdoor Adventure Vacations in California

With Outdoor Adventure Mendocino County definitely ran into a problem of competition – even though our overall aided scoring for these categories are high (people do like us as an outdoor destination), we simply don't come in top-of-mind in a state with so many options to choose from. Yosemite was the clear category leader here, in all regions, with Lake Tahoe not far behind. Surprisingly, many respondents chose theme parks as their top choices for outdoor adventure – Disneyland, Knott's Berry Farm, Legoland, Six Flags, and Sea World all made showings.

Angelenos again were very regionally-focused, pulling the averages in their direction – Big Bear, San Diego, Los Angeles itself, Mammoth, Sequoia, Palm Springs, were all in the top ten. In LA Mendocino came in 22<sup>nd</sup> (just above Universal Studios and below Ventura as an outdoor destination). In Southern Oregon, on the other hand, Mendocino (and Fort Bragg) was fairly top of mind, beating out San Diego.

**Top 20 Responses:** *What are your top three destinations when you think of an outdoor-adventure vacation you'd want to take in California?*



**2263 Total Responses**

Mendocino County Relevant: 2.29%

Ranked 13th

*Responses and Ranking for All Mendocino County Responses Combined, by Survey Region:*

Bay Area	17 Responses	2.69%	10th
LA	7 Responses	0.80%	22nd
Sacramento	14 Responses	2.85%	9th
Southern Oregon	13 Responses	4.94%	6th



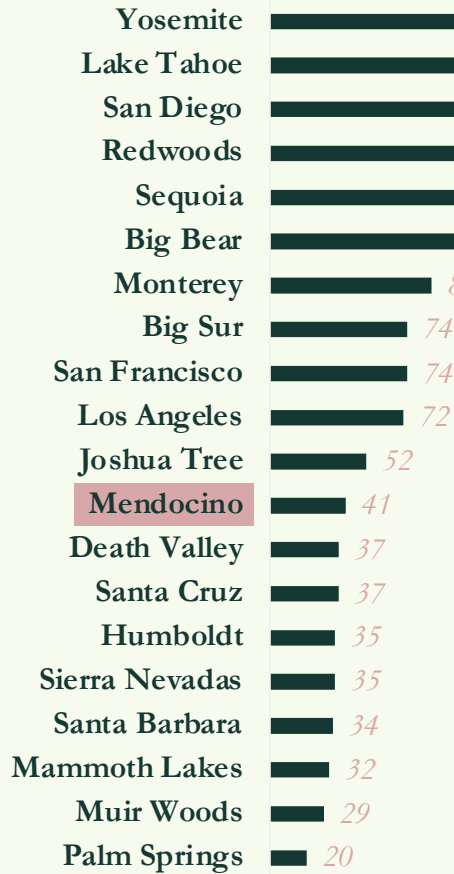
# Unaided Top Destinations for Nature and/or Wildlife Vacations in California

Again, for nature and wildlife destinations, Mendocino County is definitely competing in a crowded marketplace – especially in the Southern California market.

Overall Mendocino County made up just around 2% of the responses – ranging from 1% (in Los Angeles) to 3.36% (Southern Oregon).

Although counter-intuitive – we definitely think of Mendocino as first-and-foremost a destination renowned for our nature – it's just hard for us to rise above some of the pillar destinations in California.

**Top 20 Responses:** *What are your top three destinations when you think of a nature and/or wildlife vacation you'd want to take in California?*



**2177 Total Responses**

**Mendocino County Relevant: 2.02%**

**Ranked 12th**

*Responses and Ranking for All Mendocino County Responses Combined, by Survey Region:*

Bay Area	15 Responses	2.65%	12th
LA	9 Responses	1.01%	22nd
Sacramento	11 Responses	2.43%	11th
Southern Oregon	9 Responses	3.36%	10th



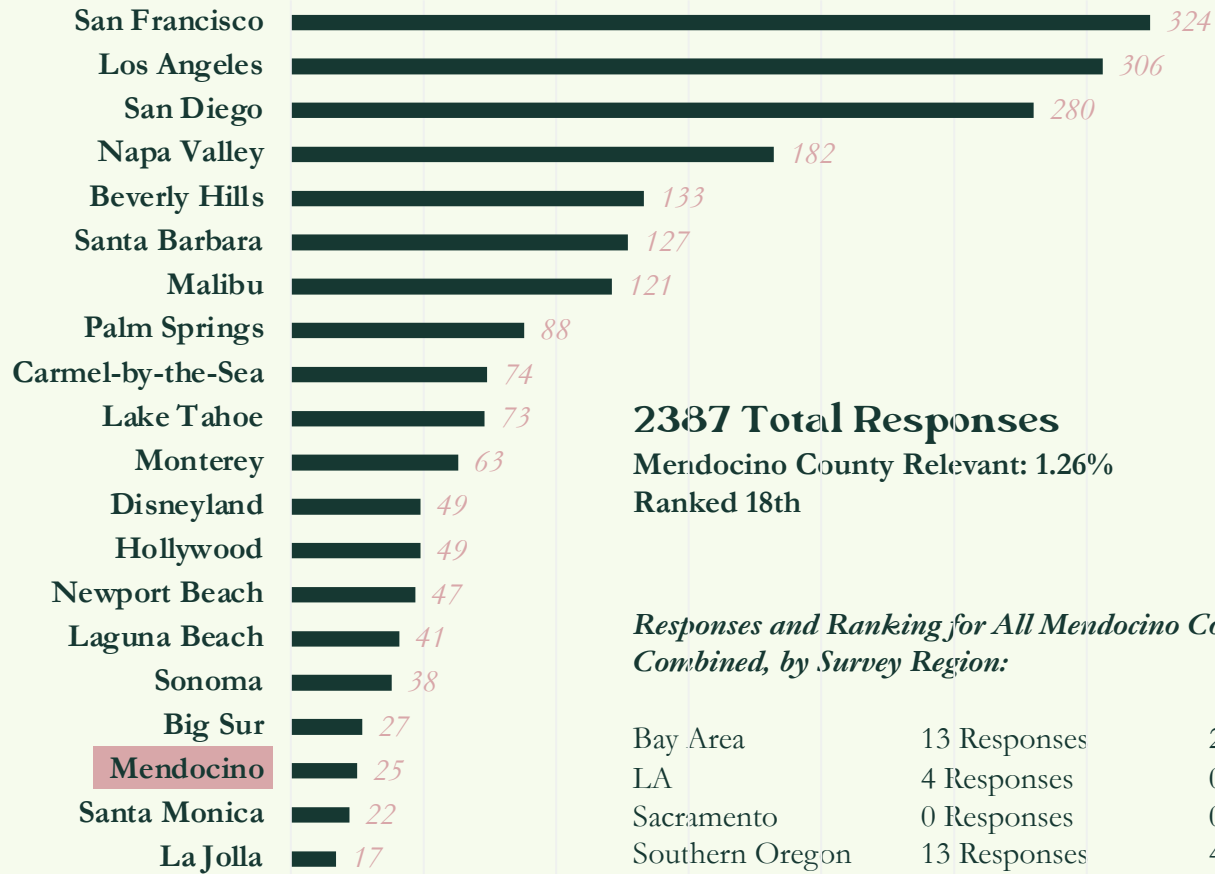
# Unaided Top Destinations for Luxury Vacations in California

For Southern Oregon Mendocino County definitely has some strong showing as a Luxury destination – coming in the top-10. Elsewhere we are not especially top-of-mind – not a single respondent in Sacramento (out of 548 responses) flagged us in their top three destinations.

Looking for the positive, many of the top slots are held by a different sort of luxury than we generally associate with Mendocino County – while Sonoma County landed only two places above us.



**Top 20 Responses:** *What are your top three destinations when you think of a luxury vacation you'd want to take in California?*



**2387 Total Responses**

Mendocino County Relevant: 1.26%

Ranked 18th

*Responses and Ranking for All Mendocino County Responses Combined, by Survey Region:*

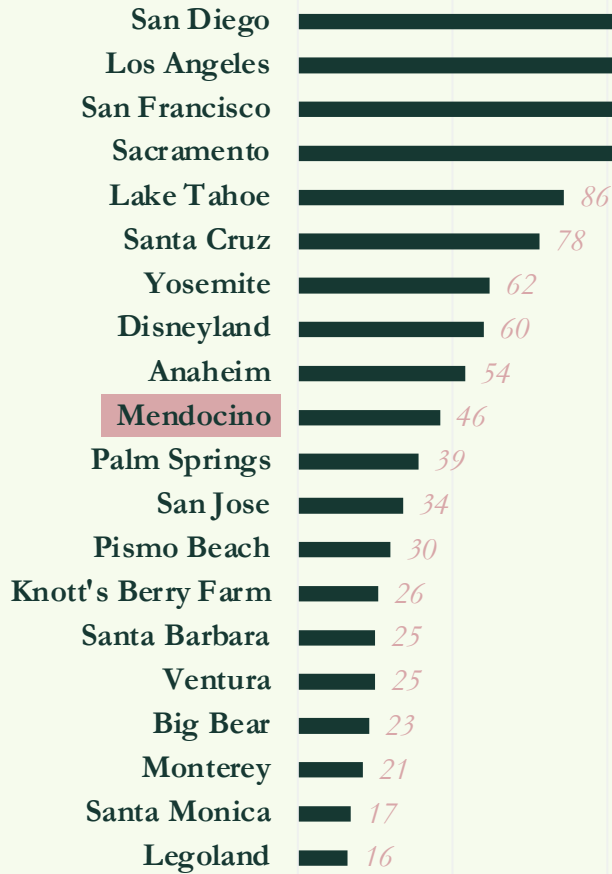
Bay Area	13 Responses	2.12%	12th
LA	4 Responses	0.43%	29th
Sacramento	0 Responses	0%	N/A
Southern Oregon	13 Responses	4.34%	8th

# Unaided Top Destinations for Value-Oriented Vacations in California

Interestingly, Mendocino County didn't place top of mind for Bay Area residents as a value-oriented destination, but it featured quite prominently for both Sacramento residents and Southern Oregon residents.

One thing we did come up against when collecting responses was how subject to interpretation 'value-oriented' was as a phrase; some people interpreted it to mean affordable, while others interpreted it to mean simply a good value (even if expensive). While the intent was to avoid negative connotations with 'budget' or other similar terms, this ambiguity may have led to some oddities in responses.

**Top 20 Responses:** *What are your top three destinations when you think of a value-oriented vacation you'd want to take in California?*



**1850 Total Responses**

Mendocino County Relevant: 2.71%

Ranked 10th

*Responses and Ranking for All Mendocino County Responses Combined, by Survey Region:*

Bay Area	0 Responses	0%	N/A
LA	11 Responses	1.58%	18th
Sacramento	25 Responses	6.02%	7th
Southern Oregon	14 Responses	5.34%	8th

# Takeaways

The data is clear that overall sentiment about Mendocino County is very high in all of our target markets; the issue is simply one of brand awareness and overall top-of-mind status. In Sacramento, the Bay Area, and Southern Oregon it is primarily an issue of top-of-mind status – when competing for ‘top three’ spaces, Mendocino County simply doesn’t rise to the level of anchor destinations like Yosemite, San Diego, or Napa for the majority of people. In Southern California we encountered more of an issue of brand awareness – many people had never heard of Mendocino County, and in fact anecdotally one thing our survey takers heard when they asked if the respondents knew of Mendocino County (for the aided survey) was, ‘You mean like the sandwich shop?’ More people in LA had heard of Mendocino Farms than the actual region in California, implying we have plenty of room to grow brand awareness in that market (perhaps via a collaboration with Mendocino Farms).

Overall our strongest performance was in more specific categories – we performed best in Cannabis, Wine, and Coastal. Both Nature/Wildlife and Outdoor were much more crowded spaces where we struggled to top other destinations. We were distinctly not thought of as a Luxury destination by most visitors. And even as a Value destination we did not rise top of mind.

That could imply an easier path in our target markets toward improving where we are already strong – tethering to Coastal, Cannabis, and Wine as anchors for our marketing campaigns in these regions. Alternately, although it would likely be a longer and more costly proposition, we could try to build up one of our brands where we currently don’t have much mindshare – positioning ourselves as an ‘undiscovered’ alternative to Yosemite or Tahoe or Big Sur (depending on what the leader is in the specific market).