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Submit comments to regionalplans@visitcalifornia.com



visit
California

Regional strategic tourism plan

North Coast

The development of these regional plans was funded by a State Tourism Grant awarded to Visit California as part of the U.S. Economic Development Administration’s Travel, Tourism and Outdoor Recreation program. The program invested federal funds appropriated by the American Rescue Plan Act to support states and communities whose tourism economy was damaged by the COVID-19 pandemic.

The majority of the grant funds were used to directly support tourism recovery through marketing initiatives. With the EDA’s oversight, a portion of the grant was directed to the development of these plans, which are designed to build a more resilient travel and tourism sector in California. While the one-time nature of the grant does not provide funding for ongoing implementation, the plans identify existing resources that can be leveraged at the state and regional level.

Visit California extends its gratitude to the diverse project teams, strategic partners and industry experts whose contributions were instrumental throughout the two-year process

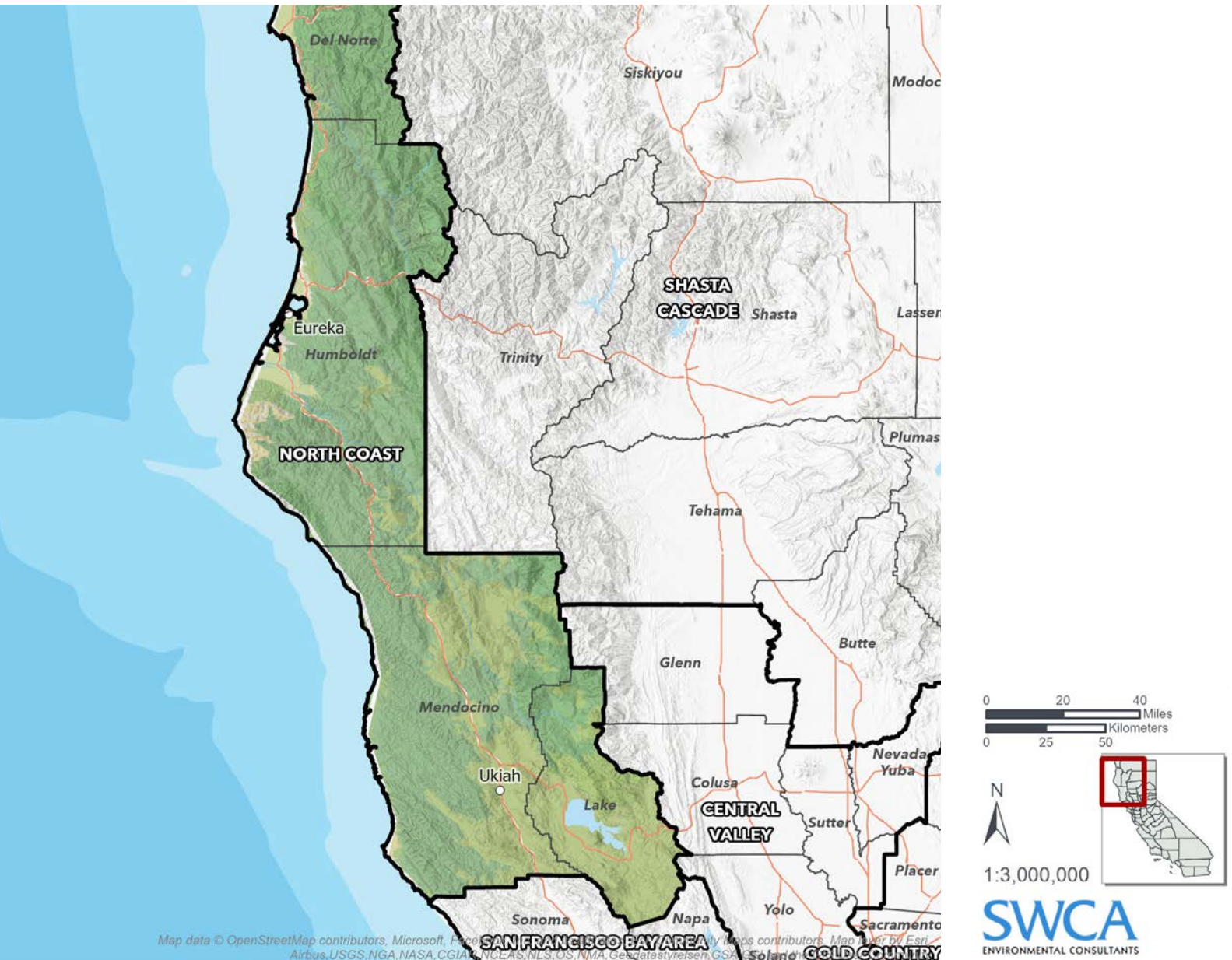


Contents

Executive summary	4
Regional research and discovery	8
State of the region.....	10
Destination plans review database	11
Stakeholder engagement.....	12
Key themes from stakeholder engagement	13
Tourism readiness index.....	14
Demand driver scorecard.....	16
Event matrix	18
Key themes from the research process	20
The Economic Impact of Travel (Dean Runyan Associates, 2023).....	21
Visit California Community Sentiment Study (Future Partners, 2023)	21
The North Coast regional opportunities	22
1. Invest in tourism product development	23
Outdoor activities	23
Cannabis tourism.....	24
Wineries and vineyards.....	25
Cultural activities	26
2. Improve tourism-related transportation infrastructure	27
3. Support workforce development	29
4. Enhance regional marketing and messaging	30
Conclusion	31
Appendix	32

Executive summary

The North Coast region of California, home to Redwood National and State Parks, stretches from Lake County to the Mendocino Coast and north along the Pacific Ocean to Crescent City and the Oregon border. This region is renowned for its natural beauty, including vast redwood forests, rugged coastline, diverse ecosystems, and outdoor recreational activities.



County Region Major Road

To develop a comprehensive tourism strategy, Jones Lang LaSalle (JLL) and Visit California undertook an extensive two-year planning process, involving multiple stakeholder engagement methods and in-depth regional research and discovery. This effort aimed to enhance, harmonize and validate existing destination plans while examining tourism priorities and opportunities from a regional perspective. The approach included a thorough review of existing plans, such as the [City of Ukiah 2040 General Plan](#), [Visit Mendocino 2021-2023 Strategic Plan](#), [Crescent City Harbor District 10-Year Strategic Plan 2018-2028](#), [Lake County California 2025-2030 Comprehensive Economic Development Strategy](#), and [Humboldt County Strategic Plan 2024-2028](#), among others.

This process included regional advisory committee meetings, tourism stakeholder surveys with over 111 participants, focus groups, individual interviews with 25-plus key industry stakeholders and site visits to 50-plus points of interest.

The research process utilized several proprietary tools and methodologies. The [tourism readiness index](#), developed in collaboration with the World Travel & Tourism Council, analyzed nearly 4,000 tourism-related data points across 68 indicators. Based on the results, the North Coast is classified as a “dawning developer.” The classification identifies the North Coast’s limited tourism infrastructure and gradual tourism growth. Notably, the North Coast stands out when compared to other regions in the areas of environmental, safety and security, and urban readiness. By continuously improving the overall experience for visitors through investments in infrastructure, amenities, attractions, and services, the North Coast can seek to become an established tourism destination.

In the context of this project, *demand* refers to motivating individual leisure travelers to visit a destination through various offerings such as products, events, activities, experiences, and other attractions. To address this challenge, two JLL analytical tools, the demand driver scorecard and the event matrix, have been used. These products are specifically designed to evaluate and analyze the effectiveness of leisure demand drivers, providing valuable insights into sustainably attracting this crucial leisure market segment.

The [demand driver scorecard](#) evaluated over 82 attractions and experiences in the region. Approximately 73% of the assets scored generate “regional” or “must see if in area” demand, with 27 attractions identified as regional demand drivers. The analysis also revealed that 83% of assets are family-friendly, including the Skunk Train, Trees of Mystery and Mendocino City Main Street. In addition, 54% of the assets scored are classified as outdoor recreation, including the Redwood National and State Parks, highlighting the region’s strengths in these areas.



Roederer Estate

The event matrix process assessed more than 30 events across the region, identifying 14 unique regional events positioned to drive demand with none of the 30 events categorized as national or global demand drivers. Based on these findings and stakeholder input, several strategic priorities were identified for the North Coast. These priorities are designed to drive sustainable tourism visitation growth while managing the tourism ecosystem to balance resident and visitor needs. The strategic priorities focus on:

- 1** Invest in tourism product development: highlight outdoor activities, activate cannabis tourism, advertise local wineries and organize cultural activities.
- 2** Improve tourism-related transportation infrastructure: expand public transport, flight connectivity and accessibility.
- 3** Support workforce development: address housing and employment challenges, collaborate with educational institutions for tailored training programs, and work with Tourism Diversity Matters.
- 4** Enhance regional marketing and messaging: promote the destination as a coastal region, establish a local ambassador program and engage with visitors to promote destination stewardship.



Stanford Inn

Phase 1 Draft: Regional strategic tourism plan | **North Coast**

These opportunities align with the broader statewide goals and Visit California’s focus on sustainable tourism development, economic growth and enhancing visitor experiences while preserving natural and cultural resources. Implementation will require ongoing engagement with stakeholders, including destination marketing organizations, local businesses and community organizations.

The strategic plan emphasizes the importance of balancing tourism growth with community needs and environmental preservation. Ongoing focus among local stakeholders will be crucial in implementing these strategies and ensuring the continued development of the region’s tourism industry.

JLL and Visit California would like to thank the North Coast Regional Advisory Committee Members who played a crucial role in this planning process. Their time, expertise, insight and valuable contributions throughout the process were instrumental in shaping this strategic plan. Please refer to the committee participants in the [Appendix](#).



Mendocino

Regional research and discovery

To ensure a comprehensive approach, the North Coast regional strategic plan integrates insights from stakeholder engagement and regional research and discovery to develop a clear vision and strategy. Throughout the two-year planning process, extensive regional research and discovery was conducted to gain an in-depth understanding of the current state of the tourism industry and identify potential areas for growth. JLL leveraged proprietary strategic planning tools, extensive stakeholder feedback and research previously conducted by Visit California to better understand each region. Many of the insights from these findings have been critical to the foundational strategies in this plan.



Eureka

The regional research and discovery section includes vast research which has been detailed further and organized under the following categories for the North Coast:

JLL-conducted research components:

- 1 State of the region overview: The overview provides a brief introductory summary of what currently impacts the tourism industry in the North Coast region.**
- 2 Destination plans review database: data gathering process which included 13 individual plans inventoried; elements include employment, preserving existing neighborhoods, protecting the environment, tourism promotion, business attraction and retention, public transit improvements, recreation opportunities and much more.**
- 3 Stakeholder engagement: This section incorporates feedback from multiple different methods outlined here:**
 - regional advisory committees: meetings held monthly with a committee consisting of 10-plus members. Please refer to the [Appendix](#) for a full list of members.
 - Tourism stakeholder survey: over 111 participants representing a diverse range of individuals and organizations involved in the tourism sector. The feedback summary highlights perspectives on strengths, weaknesses and growth opportunities.
 - Focus group feedback: in a small group environment, discussions on 12 topics were held in eight groups of stakeholders, including DMOs; lodging; restaurants and retail; arts and culture; agritourism; diversity, equity and inclusion; economic development; transportation and connectivity; and workforce and housing. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
 - Individual interviews feedback: over 25 industry stakeholders interviewed, which offered a deeper understanding of perspectives and addressed any specific questions or concerns.
 - Site visits: visited 50-plus points of interest visited throughout the North Coast across two weeks, providing valuable insights and observations.
- 4 [Tourism readiness index](#): detailed data analysis process which used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the North Coast region.**
- 5 [Demand driver scorecard](#): evaluation which identified the key assets and experiences driving visitor demand in the region.**
- 6 [Event matrix](#): evaluation which identified key events driving visitor demand in the region.**

Visit California Provided Research, JLL Reviewed Components:

- 7 The Economic Impact of Travel (Dean Runyan Associates, 2023)**
- 8 Visit California Community Sentiment Study (Future Partners, 2023)**

A comprehensive research approach allowed for the development of a clear vision and strategy for the North Coast tourism industry, with foundational strategies that are rooted in data, insights and feedback from stakeholders.

State of the region

The North Coast region of California, home to Redwood National and State Parks, is an area that stretches from Lake County to the Mendocino Coast and north along the Pacific Ocean to Crescent City and the Oregon border. Some of the region's key tourism assets include wineries and vineyards, outdoor recreation, and cultural activities. The region is home to several destination marketing organizations.

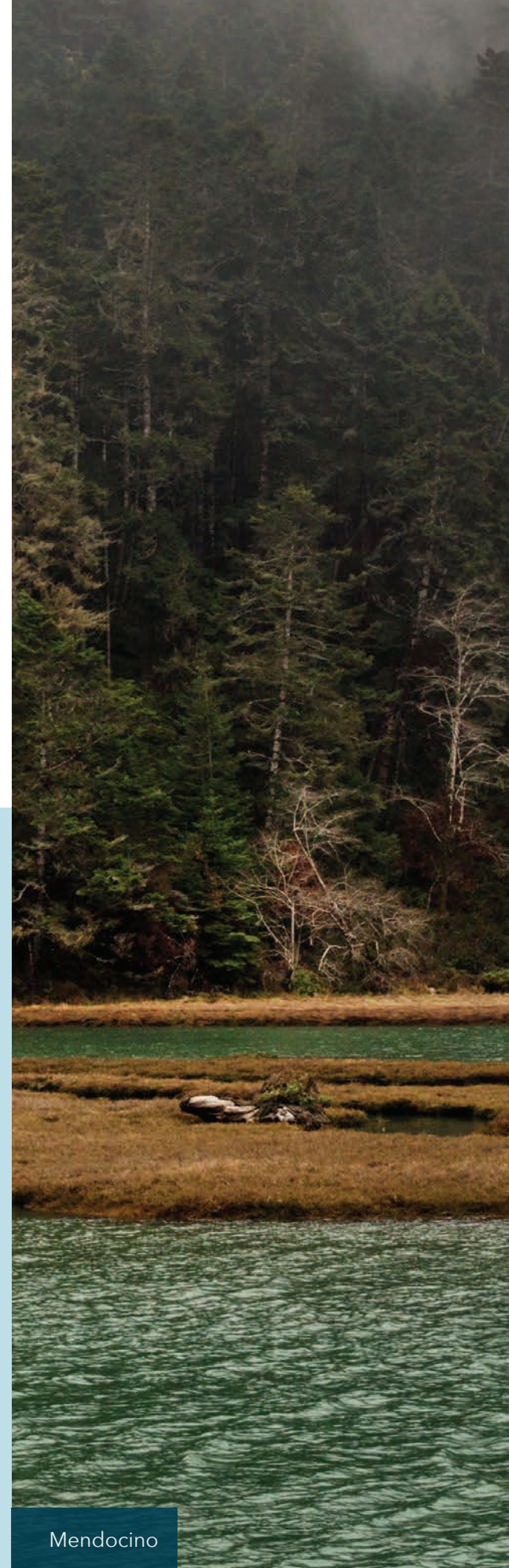
In 2023, the North Coast total travel spending reached ~\$1.34 billion, marking a slight decline of 1.0% from the previous year. Visitor spending accounted for ~\$1.3 billion, while additional travel-related expenditures added ~\$40 million. This trend represents an upward trend post-pandemic, as total travel spending has increased by ~7.5% from 2018, by ~3.8% from 2019, and by ~74.0% from 2020 highlighting the region's continued growth and recovery. (The Economic Impact of Travel, Dean Runyan Associates, 2023)

The North Coast is home to many natural and cultural experiences. Among these are the Redwood National and State Parks, home to some of the tallest trees on Earth. Mendocino Coast offers breathtaking views, while the local food and beverage scene invites travelers to sample culinary excellence. Adventurers can explore the remote Lost Coast Trail. The unique Glass Beach in Fort Bragg, along with the Victorian architecture of Eureka and Ferndale, adds to the region's allure. With various outdoor activities such as hiking, kayaking and whale watching, the North Coast offers a blend of adventure, tranquility and nature.

Visit California's Community Sentiment Study revealed the North Coast region excels with its landscapes and natural features (89%), recreational and outdoor activities (84%), climate and weather (82%), and varied selection of restaurant and dining options (76%). Popular tourist attractions include hiking trails (81%), state and national parks (76%), and beaches (73%). While residents enjoy these amenities, issues like risk of wildfires (67%) traffic and congestion (62%) are points of concern (Future Partners, 2023).

The North Coast is a region marked by its diverse population and cultural richness. It hosts a mix of small towns and rural communities with a demographic that includes a growing Hispanic/Latino population (15%) and Native American/Alaskan (2%). The area reflects economic diversity that spans tourism, agriculture and forestry. The cultural scene is shaped by a history of logging, a commitment to environmentalism and a progressive ethos. This diversity in people, lifestyles and values contributes to the North Coast's dynamic character.

The North Coast of California offers a unique blend of natural splendor and cultural richness.



Mendocino

Destination plans review database

The Regional Strategic Tourism Planning process was designed to examine issues from a regional perspective, building upon the valuable work already completed in destination-specific plans by DMOs, convention and visitor bureaus, economic development organizations, and municipalities. This approach ensures that existing efforts are leveraged and enhanced rather than duplicated.

The comprehensive review encompassed 500 plans across California, with 13 plans specifically focused on the North Coast region. A full list of the reviewed plans can be found in the [Appendix](#).

Upon analysis of the North Coast plans, several key themes were identified that align with the priorities highlighted in the present plan:

1 Sustainable community development

- Maintain small-town character
- Promote gradual, sustainable growth
- Integrate land use with community needs

2 Infrastructure and mobility

- Comprehensive transportation network
- Improve public facilities and services
- Encourage biking and walking

3 Housing and economic vitality

- Diverse housing options for all
- Support local businesses and jobs
- Foster a resilient economy

4 Environmental protection and resource management

- Conserve natural resources and open spaces
- Improve air quality and waste management
- Preserve agricultural lands sustainably

5 Community engagement and inclusivity

- Encourage public participation
- Foster an inclusive community
- Promote health and safety services

Working in conjunction with the regional advisory committee and armed with insights from the existing plans, the approach sought to examine regional issues holistically. This methodology was further validated through the engagement process. It is crucial to consider this regional plan in the context of destination-specific plans, recognizing that it does not aim to reinvent existing strategies. Instead, the regional plan serves to complement and align with these destination plans, while simultaneously reinforcing the significance of regional cooperation and engagement.

Stakeholder engagement

Stakeholder input was collected through multiple methods (outlined below in detail), including regional advisory committee discussion forums, a series of topical focus groups, a comprehensive tourism survey, a thorough site visit, and individual meetings with tourism stakeholders, industry leaders and related entities.

Regional advisory committees

Regional advisory committees were monthly gatherings composed of industry leaders within culture and heritage; diversity, equity and inclusion; economic development; lodging; meeting and events; resilience and sustainability; restaurants; retail and entertainment; workforce and more. Meetings were held approximately once a month and consisted of 10-plus members, of which a full list can be found in the [Appendix](#).

Tourism stakeholder survey

Questions from the survey capture a variety of topics, including travel preferences, satisfaction levels with accommodations, transportation, attractions, etc., suggestions for improvement and more. The tourism survey was conducted anonymously to encourage feedback and diverse perspectives from various sectors across the region, while asking overall demographics and industry profile questions to shed light on the represented stakeholder groups. This survey garnered 111 responses from across the North Coast.

Focus groups

Focus groups were conducted to discuss key themes and gather qualitative data. Eight focus groups were conducted with diverse representation, including, DMOs; representatives from the lodging; restaurant; retail; and entertainment sectors; leaders in economic development; workforce development; resilience and sustainability; transportation and infrastructure; cannabis; attractions and entertainment; diversity, equity and inclusion; and more. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.

Individual interviews

Individual meetings were held with stakeholders to collect detailed feedback. The stakeholders included industry leadership and management, supporters and individuals concerned with tourism's potential challenges and impacts on the North Coast region. The interview process encompassed 25-plus individual interviews, including all members of the regional advisory committee.

Site visits

Local visits were conducted to the North Coast region to immerse further in the local environment, engage directly with stakeholders, visit tourism sites and attractions, and witness firsthand the dynamics of the tourism industry in the North Coast region. Over 50-plus points of interest were visited throughout the North Coast.

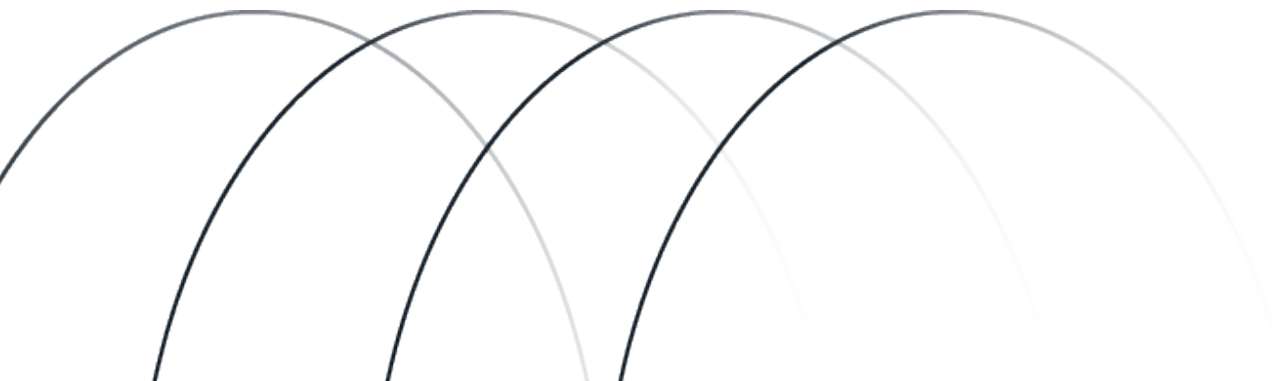
The diverse set of perspectives ensured our study comprehensively captured both the benefits and potential drawbacks of tourism. All stakeholder feedback also provided key guidance and direction to become the basis of many opportunities, supported by real-life examples from site visits.

Key themes from stakeholder engagement

The various methods of stakeholder feedback reflected several major themes within the North Coast region:

- Natural wonders and unique experiences, from rugged coastlines to awe-inspiring forests, offering a diverse array of tourism opportunities that cater to nature enthusiasts and adventure-seekers alike.
- While the scenic routes are a draw, visitors and residents often face challenges due to unexpected road closures and landslides and adverse weather conditions, which underscore the need for improved transportation infrastructure and alternative access routes.
- Visitors can indulge in the authentic viticulture of Lake County, where family-owned vineyards offer intimate, hands-on tours. However, the area grapples with issues such as limited transportation options, a scarcity of upscale lodging and environmental concerns affecting the lake's pristine condition.
- Mendocino County captivates with its picturesque coastline, varied accommodation choices and refined wine experiences. Despite its charm, the region relies heavily on car travel, and its inland hub, Ukiah, struggles to attract tourists due to its limited offerings.
- Humboldt and Mendocino counties stand at the forefront of the burgeoning cannabis tourism sector. To capitalize on this growing market, there is a pressing need for innovative marketing strategies and the development of unique cannabis-centric experiences that cater to a broader spectrum of visitors.
- Home to diverse towns, a strong network of hospitality alliances, and an array of natural and gastronomic attractions, Humboldt County is further enriched by the academic community of California State Polytechnic University, Humboldt.
- Across the region, there is tension between the desire for growth and the resistance to development, which is compounded by high barriers to entry for new ventures.
- The North Coast's untapped potential for strategic development is evident yet, to move forward, it is critical to balance environmental stewardship with the strengthening of local infrastructure to support sustainable growth.

The key themes identified above present a brief synopsis of the stakeholder conversations, focus group feedback, survey results and individual interviews. The themes supported the development of the priorities in this plan. The regional strategic planning process leveraged stakeholder feedback to validate research and direction for the future of the region. While this plan addresses many crucial aspects of tourism development, it is important to acknowledge that some identified issues fall outside the direct purview of the tourism industry and may require coordinated action from various levels of government and other sectors to effectively address.



Tourism readiness index

Overview

The first phase of the regional research and discovery involved an in-depth analysis of the North Coast as a destination based on the **tourism readiness index**. The Index is an analysis tool developed collaboratively by JLL and the World Travel & Tourism Council. The **tourism readiness index** offers destinations an opportunity to evaluate and comprehend their own tourism preparedness based on 68 essential data points that directly influence the tourism industry. The indicators evaluate the current state of the region's tourism industry and identify potential areas for future growth.

The assessment encompasses research of various aspects within a destination's landscape, including traditional hotel performance metrics, infrastructure and capacity building, environmental sustainability requirements, and more. With the insights provided by the **tourism readiness index**, destinations can gain a thorough understanding of growth readiness, enabling informed decisions and optimization of tourism strategies.

A comprehensive analysis was conducted on all 58 counties in California, examining a total of 68 indicators. The process resulted in the collection and organization of nearly 4,000 data points, categorized according to regional boundaries. All sources included were vetted by JLL and WTTC.

The **tourism readiness index** analyzed data for each region in the following categories:

- **Scale:** the capacity of the destination's tourism infrastructure, considering its size and volume.
- **Concentration:** the tendency to attract leisure visitors who focus on specific key attractions and areas.
- **Leisure:** evaluation of visitor spending, perceived attractiveness and specific attractions related to cultural and natural heritage sites and retail offerings.
- **Business:** the development of necessary infrastructure and products to support business travel.
- **Urban readiness:** investments in enhancing connectivity within the destination to attract business opportunities, talent and visitors.
- **Safety and security:** The prioritization of safety and security within policies and practices.
- **Environmental readiness:** the prioritization of sustainability through reflected strategies, policies and destination positioning.
- **Policy:** the integration of tourism policy within the destination's broader agenda.

These eight categories each incorporate up to 15 data points that are grouped to create the pillars of tourism readiness. The data points in each pillar are weighted and scored. The outcomes from this analysis determine what features of the destination need to be prioritized to ensure long-term smart growth to positively impact the local economy through tourism's benefits. See **Appendix** for further detail on the **tourism readiness index** methodology.



Headlands State Park



The North Coast results

The **tourism readiness index** reveals that the North Coast surpasses state averages in three out of eight pillars, showcasing signs of strong potential to be an emerging tourism destination. Notably, the North Coast stands out when compared to other regions in the areas of environmental, safety and security, and urban readiness. However, it falls slightly below average in concentration and falls significantly behind in policy, scale, leisure and business.

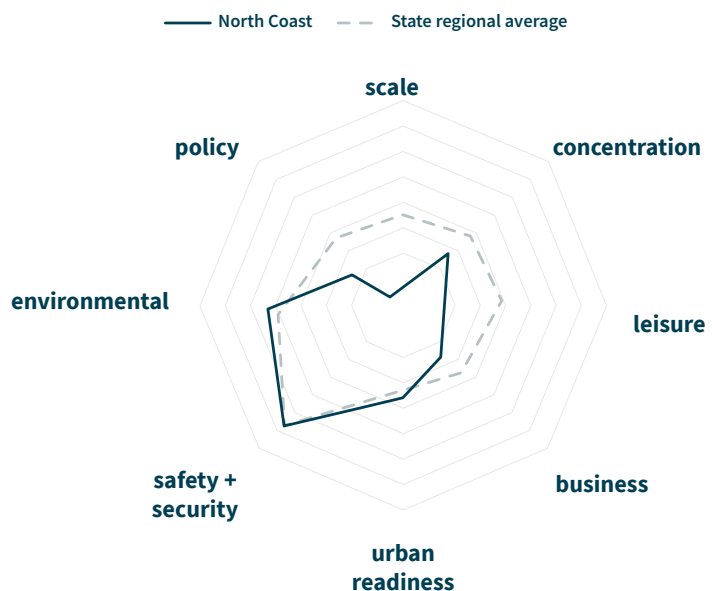
In-depth analysis of data from reputable global databases such as CoStar, Oxford Economics, TripAdvisor, and more shed light on the factors contributing to the North Coast’s readiness performance. For instance, the analyzed data highlights the positive impact of factors like economic development, availability of lodging and short-term rental inventory, a variety of restaurant options, renewable energy sources, and affordable housing options when compared to other regions.

Conversely, certain data points contribute to the underperformance in areas such as negative population growth, traffic concerns, risk of natural disasters, lack of luxury hotel offerings, limited meeting space availability, and lack of tourism-related regulations. These insights provide opportunities for targeted improvements to enhance the North Coast’s overall tourism readiness and sharpen its competitive edge.

Based on the results, the North Coast is classified as a “dawning developer.” This typology represents a destination in the early stages of tourism development. The classification identifies the North Coast’s limited tourism infrastructure and gradual tourism growth. As a dawning developer, the North Coast should prioritize strategic planning and investment, so it can seize opportunities to enhance its tourism offerings and attract new visitor segments. By continuously improving the overall experience for visitors through investments in infrastructure, amenities, attractions, and services, the North Coast can seek to become an established tourism destination. Additionally, proactively managing challenges, such as risk of natural disasters and congestion, will be crucial to ensure a smooth visitor flow during peak periods.

Please refer to the **Appendix** for a more detailed overview of the **tourism readiness index** and all destination typologies.

Outcome by pillar



Demand driver scorecard

Overview

The regional strategic planning process utilized JLL’s proprietary **demand driver scorecard** to evaluate the impact of individual regional assets and experiences and future investment opportunities. The demand driver scorecard is designed to establish a baseline and identify investment prospects within the tourism sector. Strategic planners, investors and developers gain the ability to make informed decisions backed by robust data and analysis. The Scorecard assists destinations in strategic planning and guides stakeholders in the formulation of targeted marketing to maximize returns.

This scoring process was based on an evaluation which includes:

- **Multistep assessment:** evaluating and assigning points to each attraction or experience against eight key criteria, including current visitor demand levels, event opportunities, engaging visitor experience and more (further detail outlined in the [Appendix](#)).
- **Categorization as attractions vs. attractors/demand generators:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were little to no visitor interest (0-20), Interesting to do on a repeat visit (20-39), “must see” if in the area (40-59), regional attractors (60-79), national attractors (80-95), and global attractor (96-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Categorization of each demand driver:** Segmenting assets into 13 unique market categories based on specific criteria and characteristics, including family-friendly attractions, museums, entertainment, educational attractions, outdoor recreation, and more. Assets could be assigned to multiple relevant categories.

Categorization of a region’s demand drivers helps assess the visitor experience, assists in strategic planning, identifies areas for future development or revitalization projects and enables the prioritization of enhancements to visitor-facing attractions. Overall, asset categorization provides a framework for a more organized and detailed analysis, aiding in regional research and discovery, planning, and decision-making processes.



Princess Seafood Market & Restaurant



The Skunk Train



Mendocino

The North Coast results

The North Coast demand driver scorecard process assessed 82 attractions and experiences across the region, which were identified by regional advisory committee members, desktop research and by JLL during site visits. The scoring is a representative analysis intended to highlight the inventory and diversity of assets in the North Coast region.

The results reveal that 73% of the scored assets generate “regional” or “must see if in area” demand. Notably, six attractions and experiences are identified as national or worldwide demand drivers, including popular destinations such as the Redwood National and State Parks and the Humboldt Redwoods State Park. Additionally, there are 27 assets and experiences categorized as regional demand drivers, with examples like Arcata Plaza.

According to the analysis, 83% of assets scored in the region are considered family friendly. Notable examples of family-friendly attractions include the Skunk Train, Trees of Mystery, and Mendocino City Main Street, among others. The abundance of family-friendly attractions in the region highlights the importance of catering to the needs and preferences of family travelers.

Furthermore, approximately 54% of the assets scored are classified as outdoor recreation. The outdoor recreational areas encompass popular destinations such as Redwood State and National Parks, Crescent Beach overlook and Van Damme State Park, among others. It is essential to underscore the significance of preserving and maintaining the natural assets within the region. Natural resources, such as redwood forests, parks and beaches, not only enhance the quality of life for residents but also play a vital role in attracting visitors and driving tourism.

Additionally, 30% of all assets are related to culture, heritage and history. These assets include Carson Mansion, Fritz Underground Winery, The Blacksmith Shop, and others.

Driven by the insights obtained from the demand driver scorecard, it is evident that family-friendly and outdoor assets play a vital role as key drivers of visitor demand in the North Coast region. Recognizing the significance of these assets, the region can strategically leverage and showcase its rich landscapes to attract additional visitors. Focusing on targeted scenic outdoor tourism will not only attract visitors with a specific interest in outdoor activities but also appeal to a broader audience seeking unique and immersive travel experiences. Further, the region could benefit substantially by recruiting and incentivizing new and expanded attractions in the outdoor experiences, entertainment and museum and arts categories. This strategic approach can contribute to the overall growth and sustainability of the tourism industry in the North Coast and will further be explored as a priority in the opportunities section.

The demand driver scorecard analysis findings have supported the identification of key priorities and the formulation of strategies to continue positioning the North Coast for sustainable success.

Event matrix

Overview

The event matrix process encompassed a thorough evaluation of existing annual leisure-facing events within each region. The assessment helps tourism stakeholders understand which events generated the most impact and, more specifically, what aspects of event planning could further enhance the event. Like the demand driver scorecard, JLL's event matrix product involves a dedicated analysis of individual events, charting their outcomes and impacts based on overall scores.

The iterative approach enables continual refinement and optimization as events are held each year. It empowers regions, DMOs and event organizers to stay ahead of market trends and make strategic adjustments to optimize event offerings, ensuring events remain competitive in the ever-changing landscape of the industry.

The event matrix process included:

- **Identifying significant events:** collaborated with regional advisory committee members and DMOs to inventory regionwide event master list.
- **Utilizing comprehensive criteria:** scoring each event based on 11 detailed criteria aligned with the broader tourism landscape, such as event infrastructure, planning, marketing, and potential economic impact.
- **Categorizing events based on score:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were community-based events (0-59), regional events (60-79), national events (80-95), and global events (96-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Evaluating critical mass:** assessing the overall volume and significance of current events, identifying need periods, gaps and opportunities.
- **Leveraging outcomes:** developing optimal calendar programming and identifying specific opportunities to enhance events.
- **Collaboration:** working closely with the regional advisory committee to review effective tactics, addressing study results, and engaging individual event organizers in the future.

This approach ensures a well-informed understanding of the event landscape and helps in positioning regions for success by focusing on high-impact events. See [Appendix](#) for further detail on the event matrix methodology.



Fort Bragg

The North Coast results

The North Coast event matrix process inventoried over 30 events and scored three events across the region that were collaboratively identified by the regional advisory committee, during our visits to the region, noted as high priority in stakeholder surveys and validated as significant current and future room night generators during stakeholder discussions.

The outcomes of the analysis from the event matrix identified four unique events that are positioned to drive regional demand to the North Coast, which are the Independence Day Parade, Independence Day Festival in the Park, Mendocino Music Festival, and 4th of July Deck Party. The region should consider expanding and promoting events related to the cannabis tourism community, which can help enhance the destination’s visibility. Hoteliers, retailers, creative economy representatives, and other regional representatives emphasized the annual economic impacts of events.

As part of the event matrix analysis, several additional events, such as the Whale Festival, Pumpkinfest, World’s Largest Salmon BBQ, and Mushroom Whiskey and Wine Train — Harvest Mendocino were analyzed. While these events attract some visitors, overall scores indicate these events tend to contribute relatively less overnight visitation and economic impact as compared to other annual events in the region.

The results of the event matrix indicate stakeholder focus should be placed on regional annual events that have a greater potential for driving overnight visitation to drive economic impact. A central repository of events information created from the Event Matrix would highly benefit the region and better enable travelers to plan trips around certain events. Further, it is recommended that the event matrix is utilized on an ongoing basis as an objective approach to evaluating the event inventory at any given time to assess the impacts of current events in the region.

Additionally, it is highly recommended to supplement the utilization of the event matrix with external resources to support events with regional impact. Collaborating with local DMOs, economic development organizations, and industry experts can provide valuable insights, data and expertise to further evaluate the potential economic benefits and overnight visitation drivers of current and future regional annual events. Event-related marketing should be expanded, as many events are well-regarded by those who attend, but many people with potential interest are unaware of them. This collaborative approach in conjunction with the event matrix, ensures a comprehensive and well-informed decision-making process when assessing the overall impact of current events in the region.



North Coast Brewery, Fort Bragg

Key themes from the research process

- Widespread stakeholder engagement played a crucial role in developing the regional strategic plan, with input gathered through various methods such as interviews, surveys and focus groups.
- Key themes that emerged from the engagement process include the recognition that continuous improvement of the regional visitor and attendee experience is crucial for the success of the region. The leisure segment was identified as playing a vital role in driving economic growth and sustaining a thriving visitor economy. The themes will be further explored in the opportunities section of this plan.
- JLL's **tourism readiness index** classifies the North Coast as a “dawning developer” with limited tourism infrastructure and gradual tourism growth.
- As a dawning developer, the North Coast should engage in strategic planning and investment, to seize opportunities and enhance their tourism offerings to attract more visitors.
- The North Coast demand driver Scorecard process assessed 82 attractions and experiences across the region. An investment prioritization approach based on the results of the scorecard should be put into motion during the first year of implementation.
- The demand driver scorecard results inventory the diversity of attractions and experiences in the North Coast region, with 73% of scored assets generating regional or “must see if in area” demand.
- The North coast event matrix process inventoried over 30 events and scored 32 events across the region.
- The event matrix analysis identified four unique events in the North Coast that are positioned to drive regional demand, attracting visitors consistently throughout the year.

Throughout the planning process, JLL also conducted an in-depth review of research and data provided by Visit California. Below is a summary of the findings for the North Coast.



Mendocino



MacKerricher State Park

The Economic Impact of Travel

(Dean Runyan Associates, 2023)

This report provides a comprehensive analysis of the economic effects of travel on California’s state economy. It addresses various key metrics such as travel spending, earnings, employment, and tax receipts, broken down by county and tourism regions. The data below is based on estimates and research conducted by Dean Runyan Associates for Visit California.

In 2023, the North Coast total travel spending reached ~\$1.34 billion, marking a slight decline of 1.0% from the previous year. Visitor spending accounted for ~\$1.3 billion, while additional travel-related expenditures added ~\$40 million. This trend represents an upward trend postpandemic, as total travel spending has increased by ~7.5% from 2018, by ~3.8% from 2019, and by ~74.0% from 2020 highlighting the region’s continued growth and recovery.

The economic contributions of travel in the North Coast region were profound. Employment within the travel industry remained constant, providing an additional 14,770 jobs. Direct travel-generated earnings increased by 5.9% to \$652 million, with key sectors such as arts and entertainment, ground transportation, and visitor air showing growth.

Visit California Community Sentiment Study

(Future Partners, 2023)

The Visit California Community Sentiment Study provides detailed findings and insights from various regions, including demographic data and the perceptions of residents regarding tourism. It explores both the benefits and strains of tourism on local communities and regions, highlighting aspects such as economic opportunities, traffic congestion and quality of life impacts. Specifically, the North Coast is examined in terms of its residents’ views on tourism’s economic contributions, the challenges it creates and overall community sentiment.

Key findings for the North Coast include residents’ appreciation for local amenities like landscapes and natural features of the region, their views on tourism’s role in creating events and job opportunities, and the challenges posed by traffic and congestion. This study includes more detailed evaluations on how tourism affects the North Coast region below.

The North Coast offers numerous appreciated features, such as landscapes and natural features (89%), recreational and outdoor activities (84%), climate and weather (82%), and a great selection of restaurant and dining options (76%). Popular tourist attractions include hiking trails (81%), state and national parks (76%), and beaches (73%). While residents enjoy these amenities, issues like risk of wildfires (67%) and traffic congestion (62%) are points of concern. Tourism’s dual impact is evident, with locals recognizing significant job creation, enhancing the regions reputation, and business opportunities alongside prevalent issues such as risk of wildfires (67%), traffic congestion (62%), and crowding (60%).

Residents reportedly see tourism as a net positive, enhancing local business and creating jobs. Over half of the residents agree that tourism’s benefits outweigh its problems both locally (53%) and regionally (52%). Importantly, tourism is crucial for regional economic health, with 61% of locals deeming it vital for their community and 73% for their region. In addition, approximately 40% feel that their quality of life is improved by tourism, indicating room for strategic enhancements.

Strategically, the region might focus on balancing tourism’s economic benefits with quality-of-life improvements. Addressing the risk of wildfires, traffic congestion and crowding through infrastructure and policy changes could strengthen tourism’s positive perception. Enhancing lesser-known local attractions could attract greater tourism visibility at a national and regional level. A targeted campaign highlighting the symbiotic relationship between tourism and community well-being might also foster resident support and minimize resistance.

The North Coast regional opportunities

The North Coast Regional opportunities outline several key priorities and strategies to enhance the region's tourism industry and address critical challenges. These opportunities have been developed through comprehensive research, extensive stakeholder engagement and thorough analysis of the North Coast's unique attributes. The opportunities span across various crucial aspects of tourism development, including investment in tourism product development, improvement of tourism-related infrastructure, support for workforce development, and enhancement of regional marketing and messaging.

Each opportunity area is accompanied by possible strategies designed to leverage the North Coast's diverse assets, address existing challenges, and position the region as a premier, sustainable destination for visitors. The following sections delve into these opportunities in detail, providing a comprehensive road map for stakeholders, DMOs and partners across the North Coast region to consider in the coming years. These strategies aim to foster a more integrated, sustainable and resilient tourism ecosystem that benefits both visitors and local communities while preserving the natural beauty and cultural heritage that makes the North Coast unique.



The Glen Blair Bar

1 Invest in tourism product development

Outdoor activities

A significant portion of travelers to the North Coast are drawn to the region’s natural outdoor landscape and amenities, emphasized by 70% of stakeholder Survey respondents citing active recreation (hiking, mountain biking, camping, and water sports) as a major strength of the region. While this segment of campers, RVers, and van-lifers is vital to the region’s overall visitor numbers, it traditionally contributes less to the tax base compared to other forms of tourism that involve higher spending on accommodations, dining and entertainment.

According to the North Coast Tourism stakeholder survey results, newly developed outdoor experiences, festivals and events, and destination resorts would be a major draw to the region, with 53% of stakeholder survey respondents citing increased development of outdoor experiences would have a positive impact on North Coast tourism growth and regional attraction. This aligns with the results of the [tourism readiness index](#) typology, which, as a “dawning developer,” emphasizes the need for investment in product development to drive sustainable tourism growth.

Additionally, these findings also align with the [event matrix](#), which suggests an opportunity to introduce new events geared toward driving demand from beyond the region and even nationally. If timed properly, these events could help drive overnight visitation during the off season.

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County, Visit Humboldt, Discover Ukiah, North Coast Small Business Development Center, California State Parks, U.S. Forest Service, U.S. Park Services, California State Coastal Conservancy, California State Parks North Coast Redwoods District, Smith River Alliance

Strategies

- Organize investment forums and regional tours to demonstrate what the region has to offer and to connect potential investors with local businesses and entrepreneurs interested in establishing a hospitality business or expanding an existing operation. This would further support the [tourism readiness index](#) typology as a dawning developer focused on product development throughout the region.
- Aligning with [Lake County California 2025-2030 Comprehensive Economic Development Strategy](#), emphasize the opportunity for tourism product development and economic growth of a remediated Clear Lake, the state’s largest natural freshwater lake; highlight its potential as a prime location for new resort development and the redevelopment of existing facilities. Position Clear Lake as an ideal venue for hosting events such as festivals, concerts and sporting competitions.
- Identify and distribute information related to available local, state and federal incentives for private-sector businesses in the region to invest in outdoor recreation facilities, services and experiences, as aligned with [Crescent City Harbort District 10-Year Strategic Plan 2018-2028](#) and [Humboldt County Strategic Plan 2024-2028](#). Note: Government incentive programs tend to have short application windows and are constantly evolving but below are two examples of current programs that regional stakeholders have considered and could serve as a reference or provide guidance to future incentive seekers.
 - [California Competes Tax Credit](#) is an income tax credit available to businesses who want to come, stay or grow in California.
 - [California Rural Recreation and Tourism Program](#) funded new recreation opportunities within rural communities to support health-related and economic goals.

Cannabis tourism

The Emerald Triangle, comprising Humboldt, Mendocino and Trinity counties, has a longstanding connection with the cannabis industry, which is deeply intertwined with the area’s cultural heritage and commerce. The North Coast’s cannabis industry has roots that date back to the counterculture movement of the 1960s. The back-to-the-land movement brought individuals to the region seeking alternative lifestyles, and these pioneers began cultivating cannabis, which was well-suited to the region’s climate and remote landscapes. Over time, this led to the development of a unique cannabis culture with deep-seated traditions and expertise in cultivation.

The North Coast is renowned for producing some of the highest quality cannabis in the world, emphasizing the opportunity for cannabis experiences to be part of tourism product development. The combination of favorable climate, rich soil and generations of cultivation knowledge has resulted in a global reputation for excellence among cannabis users. This has also led to the region being recognized as a major destination for cannabis tourism, with visitors interested in learning about the region’s unique cultivation practices and experiencing the historic cannabis culture. Much of the experience relates not to consumption, but to culture and practice.

The [demand driver scorecard](#) suggests that the North Coast has few national or even worldwide draws. Cannabis tourism could offer the North Coast a national or even global draw, tapping into new source markets and extending the average visitor stay.

According to the event matrix, the North Coast could also benefit from more events, specifically events that produce a stronger regional draw and even national draw. Events developed around cannabis tourism could be an opportunity to help increase demand and, if timed properly, could help offset some of the seasonality that the region experiences.

While studies have been performed across the state and the North Coast, cannabis popularity among enthusiasts suggests a broader destination opportunity. Understanding the nuances of strategic direction in the North Coast is vital before moving forward with any initiative or effort.

This is not intended as a statewide strategy, but rather as a targeted regional strategy leveraging the North Coast’s existing individual strengths and cultural legacy. By embracing and formalizing cannabis tourism, the North Coast can attract a new segment of travelers, differentiate itself within the marketplace, and create a tourism experience that is authentic to its history and community.

Key partners

North of Ordinary, Visit Mendocino, Visit Humboldt, Discover Ukiah, Brian Applegarth, California Department of Cannabis Control, California Cannabis Industry Association, North Coast Small Business Development Center, Sonoma Mendocino Economic Development Division

Strategies

- Commission a comprehensive cannabis study to evaluate the perceptions, potential upside and associated risks of branding cannabis tourism in the North Coast region and provide valuable insights and data to inform strategic decision-making around branding, marketing and product development.
- Appoint a regional cannabis tourism strategic director to spearhead the development and promotion of cannabis-related tourism initiatives in the North Coast region, including brand identity, product development, collaboration, and marketing.
- Create cannabis tourism experiences — to the extent allowed by state law - through storytelling, education and events (e.g., harvest festivals, farm tours, culinary pairings), while ensuring safety and compliance by working with local businesses.
 - The [Kentucky Bourbon Trail](#), created by the Kentucky Distillers’ Association in 1999 to promote the bourbon industry and boost tourism in the state, is a renowned tourist attraction in Kentucky that celebrates the state’s rich heritage of bourbon whiskey production through distillery tours, tastings and educational experiences.

Wineries and vineyards

The North Coast wine region, encompassing the scenic Mendocino and Lake counties, is poised to elevate its presence in the world of wine tourism. By leveraging existing efforts from Visit California’s website, the Anderson Valley Winegrowers Association, Lake County Winery Association, and the Mendocino Winegrowers, the region aims to enhance its brand and offer visitors a curated experience of its diverse wine offerings.

A curated behind-the-scenes intimate experience at a small rustic winery offers an exceptional experience, for both wine enthusiasts and casual visitors. This type of exposure allows guests to delve into the authentic charm and rich heritage of winemaking. Unlike more commercialized competitor vineyards, the intimate setting facilitates a deeper connection with the winemakers, who share their passion, stories and expertise. This authentic journey not only enhances one’s appreciation for the wine culture but also provides a comprehensive understanding of the artistry and dedication behind each bottle. The focus of this initiative is on creating more intimate winery experiences, differentiated from its more commercialized competitors, with enhanced trails that connect small and medium-sized wineries, providing a niche journey through the region’s rich viticultural landscape.

Similar to outdoor activities and cannabis opportunities, the [demand driver scorecard](#) and [event matrix](#) findings support continued development of new thematic experiences, like wineries and vineyards, to encourage product development and provide a thematic backdrop around which events can be created with the purpose of appealing to a wider regional and national draw.

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County, Visit Humboldt, Discover Ukiah, North Coast Small Business Development Center, Mendocino Winegrowers Inc., Anderson Valley Winegrowers Association, Lake County Winery Association,

Strategies

- Showcase the North Coast wine culture as distinct from more mainstream experiences in Napa and Sonoma, establishing a brand that represents an intimate, authentic and off-the-beaten-path alternative, which aligns with the [Lake County California 2025-2030 Comprehensive Economic Development Strategy](#).
- As noted in the [City of Ukiah 2040 General Plan](#), curate unique wine experiences that highlight the region’s distinct terroir and boutique wineries; focus on the history, people and the rustic charm and differentiation of the North Coast’s wine culture. Create the opportunity to interact directly with the local winemakers as part of the tasting and educational experience.
 - For example, [Applegate Valley Wine Trail](#) in southern Oregon is a welcoming community of boutique and family-owned wineries that allows visitors to meet winemakers, learn about the winemaking process and sample a variety of wines.
- Organize regionwide wine events, such as barrel tastings, winemaker dinners, and grape stomps, to attract visitors and media attention and drive overnight visitation that can enhance the existing [event matrix](#).

Cultural activities

The rich cultural and historical heritage of the North Coast, including Indigenous history and artisanal crafts, is not fully leveraged in the current tourism product. There is potential for developing cultural tours, museums and interactive experiences that tell the deeper stories of the region.

According to the Tourism Stakeholder Survey, the Indigenous culture and local arts culture were rated among the top strengths of the North Coast region as a tourism destination, with 21% of respondents ranking Indigenous culture and 18% ranking local arts culture as one of the top three strengths of the region as a tourism destination, respectively.

The region is home to the Eureka Cultural Arts District, one of California's 14 designated cultural districts. Additional arts and cultural draws include film festivals, art exhibitions, public art installations, performing arts, orchestras, and open studio events. The Mendocino Art Center, home to the annual Native Arts Expo as well as various workshops and galleries. In addition, local Indigenous tribes promote their heritage through cultural attractions, events and educational initiatives. There have been successful efforts to encourage Indigenous organizations' representation within tourism boards, business associations and other similar organizations, but there are opportunities for continued efforts in this area.

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County, Visit Humboldt, Discover Ukiah, North Coast Museum Alliance, Arts Council of Mendocino County, Humboldt Arts Council, Yurok Economic Development Corporation

Strategies

- Invite representatives from Indigenous tribes and organizations to be part of tourism boards, advisory groups and business organizations to further integrate cultural leaders into discussions around new product development and regional events, to incorporate local Indigenous heritage into the growing visitor experience and broader tourism economy. See Event Matrix for a list of current events throughout the North Coast region.
- As aligned with the [City of Ukiah 2040 General Plan](#), leverage the strength of the region's existing arts culture to create and organize immersive events that cater to overnight visitors, including art exhibitions, cultural festivals and public art installations. Build upon existing measures taken by the North Coast Arts Council to attract tourists and foster appreciation for local arts-based initiatives. This is also consistent with the findings of the [event matrix](#) that suggest the need for more events that draw a broader regional and even national visitor.
- Increase awareness and knowledge of regional Indigenous tribes through cultural attractions, events and educational initiatives, while ensuring authenticity and respect for cultural traditions.



2 Improve tourism-related transportation infrastructure

Tourism stakeholder survey respondents believe that the biggest tourism weakness in the North Coast region is “inadequate transportation options.” About 50% of respondents believe that taxi and ride-share infrastructure is “poor.” Furthermore, 61% of respondents rated the ease of transportation accessibility as “lacking” within the region.

The region is primarily served by U.S. 101, a single main road that runs from the south to the north, which not only limits access but also creates vulnerability to disruptions. This road is prone to closures due to natural disasters, such as landslides, wildfires and floods, which can isolate communities and deter visitors. The lack of alternative routes and the poor conditions of many secondary roads further exacerbate the situation.

Public transportation options within the North Coast are limited to local or county bus services, (Mendocino Transit Authority, Humboldt Transit, Redwood Coast Transit, etc.) The lack of a comprehensive, multimodal public transit system makes it challenging for visitors without private vehicles to explore the region. Ride-sharing options such as Uber and Lyft are also inconsistent and unreliable.

The North Coast region currently suffers from limited air connectivity, with few direct flights from major cities or international airports. The existing regional airports, Humboldt County Airport (AEV) and Del Norte County Airport (CEC) have limited capacity and service, which can be a significant barrier for tourists, particularly those traveling from distant locations. The lack of air connectivity restricts the flow of visitors from outside the drive market.



Eureka

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County, Visit Humboldt, Discover Ukiah, Mendocino Transport Authority, Humboldt Transit, Lake Transit Authority, Del Norte Local Transportation Commission, Redwood Coast Transit, Del Norte County Regional Airport, Caltrans

Strategies

- In alignment with the [City of Ukiah 2040 General Plan](#) and [Humboldt County Strategic Plan 2024-2028](#), strengthen relationships with regional transportation leaders to ensure future strategies, growth projections and investments.
- Consider evolving needs and expectations of the visitor economy, informed by tourism data and visitor and resident sentiment surveys.
- Publish a consolidated transportation schedule that integrates and synchronizes the timing and availability of key transportation options throughout the region (e.g., air service, rental cars, public transit, ride-sharing, bike-sharing) to provide visitors with guidance around regional accessibility and intraregional transportation to assist visitors in more seamlessly connecting elements of their itineraries.
- Identify optimal sites for installing EV chargers throughout the region, to preserve the iconic California road trip under growing EV popularity, by looking at high-traffic areas, popular tourist attractions and key transit hubs to ensure accessibility and convenience for EV users.

3 Support workforce development

According to the Visit California Community Sentiment Study, over 76% of residents highlighted that the No. 1 benefit of tourism is that it provides jobs to local residents in the North Coast. Tourism Stakeholder Survey respondents affirm that housing and living costs are the biggest challenges in recruiting and retaining workforce. Within the last two years, 53% of employers surveyed had experienced challenges with workforce recruitment. Further, 52% of respondents cited the cost of housing and 43% of respondents cited the available housing as the most challenging issues related to workforce retention.

The North Coast faces challenges when it comes to retaining and attracting full-time employment. High turnover rates can disrupt operations and increase recruitment costs. Additionally, the seasonality that the region currently faces further contributes to staffing issues.

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County, Visit Humboldt, Discover Ukiah, North Coast Resource Partnership, Tourism Diversity Matters

Strategies

- Partner with local universities and colleges (e.g., Cal Poly Humboldt) to develop specialized tourism and hospitality programs that align with the needs of the North Coast's tourism industry.
 - The [Hospitality College Mentor Program](#) from the University of Nevada, Las Vegas connect students and hospitality industry professionals to support students as they begin making career choices
- Participate in apprenticeship programs that partner local businesses and industry organizations with those interested in a career in hospitality and tourism, such as [Tourism Diversity Matters](#).
- Create a shared employment pool to help employees and employers coordinate schedules, ensuring full-time, year-round job opportunities for the regional hospitality workforce.

4 Enhance regional marketing and messaging

The North Coast is known for its natural beauty and outdoor attractions. From the cliffs of Mendocino to the redwoods of Humboldt, the North Coast offers scenic landscapes, tight-knit communities, and a variety of experiences. The North Coast should highlight its core tourism assets, including beaches, redwood forests and cultural heritage. Protecting these natural attractions for future generations and respecting local communities and residents should be an integral part of the visitor's journey. This will ensure the North Coast preserves and embraces its rural character and continues to be a destination for those looking for unique and breathtaking outdoor experiences.

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County, Visit Humboldt, Discover Ukiah, California Green Business Network, Regenerative California, California State Coastal Conservancy, California State Parks North Coast Redwoods District, Smith River Alliance

Strategies

- Establish a regionwide ambassador program that enlists residents and local business owners to be the authentic voices of the region, share their love for the region, and provide authentic testimonials and insider tips. This aligns with the [Humboldt County Strategic Plan 2024-2028](#).
 - Referred to by regional leaders as the gold standard ambassador program, Sonoma County has set an example with the implementation of its Accredited Hospitality Professional program. The main goal of the program is to educate professionals on “The Foundational Five” key areas of Sonoma County hospitality: the power of tourism, sustainability, wineries, art and culture, and customer service.
- Leverage the California Welcome Centers in Eureka and Ukiah as existing resource hubs staffed with personal travel concierges, knowledgeable experts ready to provide information to enhance and enrich visits no matter the focus – the arts, local culture, or ecological crossroads.
- In alignment with [Lake County California 2025-2030 Comprehensive Economic Development Strategy](#) and [Crescent City Harbort District 10-Year Strategic Plan 2018-2028](#), make destination stewardship an integral part of the visitor experience, inviting visitors to share the honor and responsibility of caring for the coastal destination, through creative campaigns that gamify destination stewardship.
 - Fayetteville, Arkansas gamified, disposing of cigarette waste with “[ballot bins](#)”, which have significantly reduced cigarette litter in the city.
- Integrate Visit California’s [Responsible Travel Code \(RESPECT\)](#) into existing efforts or supplement with region, city, county, or attraction-specific nuances so as to encourage visitors to do their part in preserving the natural environment of the North Coast, especially in the Redwood National and State Parks.

Conclusion

The North Coast Regional Opportunities initiative signifies a transformative leap in the endeavor to enhance and sustain the tourism sector within this vibrant region. This comprehensive initiative is built upon a foundation of extensive stakeholder engagement, meticulous research and in-depth strategic analysis. By identifying and exploring various opportunities, the initiative aims to chart a course that will lead the North Coast toward a future that is not only economically prosperous but also vibrant and sustainable.

The collaborative nature of this initiative is underscored by the invaluable contributions from a diverse range of stakeholders. These include destination marketing organizations, economic development agencies, attraction owners and operators, leaders from the cannabis sector, and advocates for sustainability. Each of these groups has played a pivotal role in shaping the opportunities that will guide the region's tourism strategy. Their insights and perspectives have been essential in ensuring that the initiative is comprehensive and reflective of the community's needs and aspirations.

At the heart of this strategic framework are four key focus areas: Invest in Tourism Product Development, Improve tourism-related infrastructure, support workforce development and enhance regional marketing and messaging. These focus areas serve as the cornerstone of the initiative, highlighting a strong commitment to fostering a sustainable tourism future. By prioritizing these elements, the North Coast aims to not only enhance its tourism offerings but also ensure that the growth of this sector aligns with the region's ecological and cultural values.

While the journey ahead may present challenges, it is also filled with opportunities for growth and innovation. The North Coast has the potential to become a leader in sustainable tourism development by aligning its initiatives with the region's overarching vision and core values. This alignment will not only benefit the local economy but also preserve the unique character and natural beauty that define the North Coast.

The project team expresses sincere appreciation for the contributions of all participants involved in this initiative. Their feedback and insights have been vital in developing strategies that are responsive to the specific needs of the North Coast region.

As the initiative progresses, it is crucial to maintain a focus on the engagement of all stakeholders. This approach will help ensure that the tourism sector thrives while upholding a strong commitment to sustainability and community well-being. The future of the North Coast's tourism industry is promising and through dedicated efforts, a resilient and flourishing tourism ecosystem can be established that benefits the region as a whole.



Appendix

Regional advisory committee members

We would like to extend our heartfelt appreciation to the entire Visit California team, the dedicated members of the regional advisory committee, as well as the stakeholders and partners across the community who actively participated in the regional strategic tourism Planning process for the North Coast. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Ben Rickelman	County of Lake, California
Brian Applegarth	Applegarth Strategies
Brian Fisher	Visit Lake County
Cindy Vosburg	Visit Del Norte County
Debbie Thompson	Trees of Mystery
Jennifer Owen	North Coast Brewing Co.
Julie Benbow	North of Ordinary, Visit Humboldt
Karen Gaffney	North Coast Resource Partnership
Katrina Kessen	Discover Ukiah
Lynnette Braillard	LuLish, Council to Crescent City Visitor's Bureau
Mary Anne Petrillo	West Business Development Center
Ramon Jimenez	Visit Mendocino
Robert Jason Pinoli	Mendocino Railway
Sara Barbour	Yurok Economic Development Corporation

Engaged destination marketing organizations and convention and visitors bureaus

We extend our sincere thanks to the destination marketing organizations and convention and visitors bureaus whose partnership and expertise were essential to the success of this project. Their insights into local tourism landscapes and their commitment to collaboration were invaluable.

Organization

North of Ordinary

Visit Del Norte County

Visit Mendocino

Visit Lake County

Visit Humboldt

City of Eureka

Crescent City Visitor's Bureau

Discover Ukiah

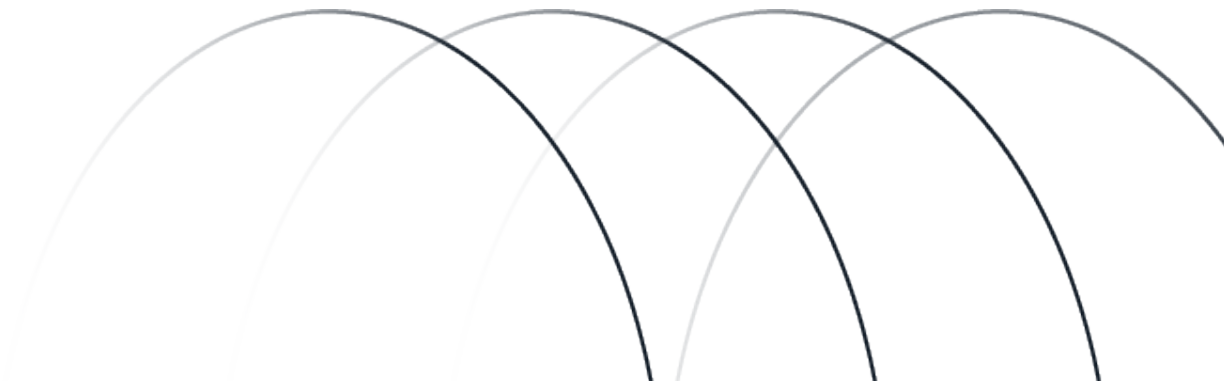


Mendocino

Destination plans review database

A review of the following existing regional plans was conducted to establish context and identify key priorities and available resources for this project:

City/County	Name of Plan
Del Norte County	City of Crescent City General Plan
Humboldt County	City of Eureka 2040 General Plan
Humboldt County	Arcata General Plan: 2020
Humboldt County	City of Fortuna General Plan
Humboldt County	City of Rio Dell 2015 General Plan
Humboldt County	City of Ferndale General Plan
Humboldt County	Climate Action Plan
Lake County	2040 General Plan Update City of Clearlake, Ca
Lake County	General Plan 2025 City of Lakeport
Mendocino County	City of Ukiah 2040 General Plan
Mendocino County	City of Fort Bragg General Plan
Mendocino County	City of Willits General Plan
Mendocino County	Point Arena Community Action Plan



Focus group attendees

We extend our sincere gratitude to all the focus group participants whose valuable insights and contributions were essential to the development of this plan. Your time and expertise are deeply appreciated.

Name	Organization
Adam Spencer	Redwood Rides
Alegria Sita	Sequoia Park Zoo Foundation
Alex Kwan	Redwood Rides
Ashley Osia	Friends of the Dunes, Sequoia Park Zoo Foundation
Ashley Taylor	City of Crescent City
Ben Rickelman	Lake County
Brian Fisher	Visit Lake County
Cindy Vosburg	Visit Del Norte County
Cristal Munoz	City of Fort Bragg
Debbie Thompson	Trees of Mystery
Debra Sommerfield	Lake County Winegrape Commission
Dianna Rios	Humboldt County
Emily Reed	Tolowa Dee-ni' Nation
Greg Foster	Redwood Region Economic Development Commission
Jan Wortman	Historic Requa Inn
Jennifer Eddy	Eddy Alexander
Jennifer Owen	North Coast Brewing Co.
Jenniifer Schmidt	Schmidt's House of Jambalaya
John S. Thompson	Trees of Mystery
Julie Benbow	North of Ordinary, Visit Humboldt
Katrina Kessen	Discover Ukiah
Kayla Corder	Eddy Alexander
Laura Lasseter	Southern Humboldt Business and Visitors Bureau
Leila Roberts	Humboldt Area Foundation, North Coast Small Business Development Center
Leslie Castellano	Ink People
Lynne Butcher	Tallman Hotel & Blue Wing Saloon
Lynnette Braillard	LuLish, Council to Crescent City Visitor's Bureau
Maria Orozco	Redding Rancheria
Mark Carter	Carter House
Mary Anne Petrillo	West Business Development Center

Focus group attendees (cont.)

Name	Organization
Micah Rosenoer	Hipcamp
Mo Mulheren	Mendocino County
Nicole Flora	Lake County Economic Development Corporation
Nicole Hill	Stoble Coffee
Patti Hillier	Requa Inn
Ramon Jimenez	Visit Mendocino
Raymond Bacon	Yurok Economic Development Corporation
Robert Gernert	Economic Development & Financing Corporation
Robert Jason Pinoli	Mendocino Railway
Sara Barbour	Yurok Economic Development Corporation
Sarah West	City of Eureka
Sarah McCormick	City of Fort Bragg
Scott Adair	City of Santa Rosa, Humboldt County
Sierra Grossman	Sierra Nevada Brewing Company
Terra Wagner	Little River Inn
Tom Kavanaugh	The Idea Cooperative



Eureka

Stakeholder interviewees

We would like to express our sincere thanks to our stakeholders and interviewees for their collaborative spirit and willingness to share their knowledge. Their partnership was invaluable in achieving the goals of this project.

Name	Organization
Ben Rickelman	Lake County
Bob Gilbert	Visit Eureka
Brian Applegarth	Applegarth Consultative Strategies
Brian Fisher	Visit Lake County
Chris Ambrosini	Humboldt Lodging Alliance
Cindy Vosburg	Visit Del Norte County
Debbie Thompson	Trees of Mystery
Jennifer Eddy	Eddy Alexander
Jennifer Owen	North Coast Brewing Co.
John S. Thompson	Trees of Mystery
Julie Benbow	North of Ordinary, Visit Humboldt
Karen Gaffney	North Coast Resource Partnership
Katrina Kessen	Discover Ukiah
Kayla Corder	Eddy Alexander
Ken Hamik	Board of Directors Humboldt County Visitors Bureau
Lynne Butcher	Tallman Hotel & Blue Wing Saloon
Lynnette Braillard	LuLish, Council to Crescent City Visitor's Bureau
Mark Carter	Carter House
Mary Wilson	Ocean World Aquarium
Micah Rosenoer	Hipcamp
Nehal Patel	Eureka Lodging Alliance
Peggy Ducey	City of Fort Bragg
Ramon Jimenez	Visit Mendocino
Raymond Bacon	Yurok Economic Development Corporation
Robert Jason Panoli	Mendocino Railway
Sara Barbour	Yurok Economic Development Corporation
Sean Burpee	Heritage House Resort
Terra Wagner	Little River Inn

Visited points of interest

The following points of interest were visited to gather firsthand information and context for this project:

Point of Interest	Location	Point of Interest	Location
Redwood Highway	Arcata	The Blacksmith Shop	Ferndale
Downtown Clearlake	Clearlake	Glass Beach	Fort Bragg
Cloverdale River Park	Cloverdale	MacKerricher State Park	Fort Bragg
La Plaza Park	Cotati	Mendocino Coast Botanical Gardens	Fort Bragg
Battery Point Lighthouse	Crescent City	Noyo Headlands Park	Fort Bragg
Jedediah Smith Redwoods State Park	Crescent City	North Coast Brewing Company	Fort Bragg
Crescent Beach Overlook	Crescent City	Konocti Harbor Resort	Kelseyville
Ocean World	Crescent City	Buckingham Golf and Country Club	Kelseyville
Redwood National and State Parks	Crescent City	Trees of Mystery	Klamath
Tolowa Dunes State Park	Crescent City	Clear Lake	Lakeport
Del Norte Coast Redwoods State Park	Crescent City	Van Damme State Park	Litte River
Point St George Heritage Area	Crescent City	Mendocino Headlands State Park	Mendocino
Sally's by the Sea	Crescent City	Point Cabrillo Lighthouse Museum	Mendocino
SeaQuake Brewing	Crescent City	Mendocino City Main St	Mendocino
Oceanfront Lodge	Crescent City	Mendocino Market	Mendocino
Sequoia Park Zoo	Eureka	Café Beaujolais	Mendocino
Eureka Main Street	Eureka	The Phoenix Theater	Petaluma
Carson Mansion	Eureka	Avenue of the Giants	Scotia
Old Town Eureka	Eureka	Trinidad State Beach	Trinidad
Humboldt Bay	Eureka	Art Center Ukiah	Ukiah
Headwaters Forest Reserve	Eureka	Cow Mountain Recreation Area	Ukiah
Lost Coast Brewery and Cafe	Eureka	Montgomery Woods State Reserve	Ukiah
Humboldt Smokehouse	Eureka	Lake Mendocino	Ukiah
6th & E Street Eatery	Eureka	Hall of Ten Thousand Buddhas	Ukiah
Carter House Inns	Eureka	California Welcome Center	Ukiah
Brick and Fire	Eureka	Tallman Hotel	Upper Lake
Tavern 1888	Eureka	Blue Wing Saloon	Upper Lake
Ferndale Historic Cemetery	Ferndale	MainStreet	Upper Lake
Ferndale Museum	Ferndale	Humboldt Redwoods State Park	Weott
Fern Cottage Historic District	Ferndale	Skunk Train Depot	Willits
Ferndale Arts Gallery	Ferndale		

Global destinations' readiness for sustainable tourism

- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities' tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety and security as well as the prioritization of tourism.
- Indeed, no two destinations are better or the same and, as such, the challenges they will face, and the opportunities to unlock their tourism potential, will differ.
- However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

Tourism Readiness Index

- Comprehensive analysis addresses what makes a destination ready for sustainable travel and tourism.
- Assess current positioning and ability to manage growth
- Indicators | 75 data points across all facets of the tourism economy
- Outcomes | eight categories and five destination typologies



Globally recognized tool validated by over 100 domestic and international destinations and the World Travel & Tourism Council



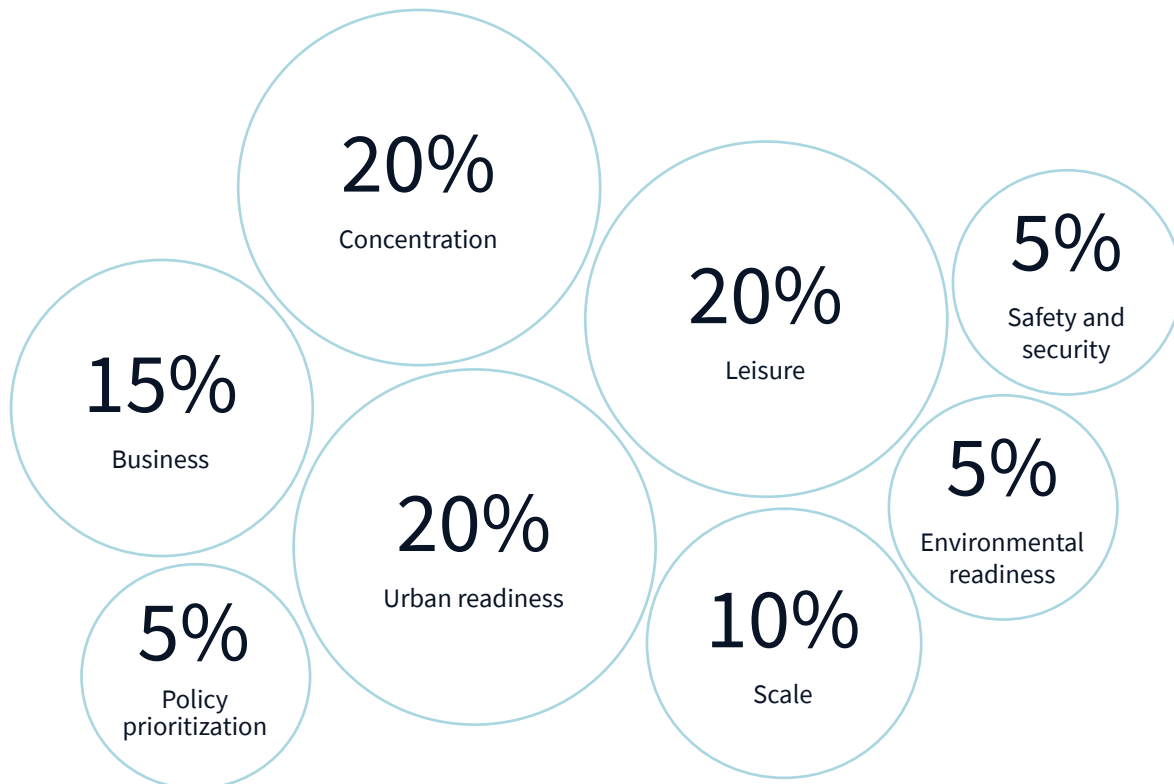
Tourism Readiness Index Categories

- | | |
|----------------------------|--------------------------|
| 1. Scale | 5. Concentration |
| 2. Leisure | 6. Business |
| 3. Environmental readiness | 7. Urban readiness |
| 4. Safety and security | 8. Policy prioritization |

Levels of readiness | Destination typologies

Dawning Developers	Emerging Performers	Balanced Dynamics	Mature Performers	Managing Momentum
<p>Limited tourism infrastructure</p> <p>Gradual tourism growth</p> <p>Opportunities ahead with planning</p>	<p>Growing momentum</p> <p>Rising infrastructure</p> <p>Opportunities for strategic development</p> <p>Smaller scale — may experience pressures</p>	<p>Established infrastructure</p> <p>Growth in business and leisure paces with scale</p> <p>Equalized scale and concentration</p>	<p>Strong leisure and/or business travel dynamics</p> <p>Established tourism infrastructure</p> <p>Proactively manage pressures and capacity building</p>	<p>Historically high growth momentum</p> <p>Aging or strained tourism infrastructure</p> <p>Feeling the pressures of scale and concentration</p>

Weights by Category



The North Coast results

Outcome by pillar

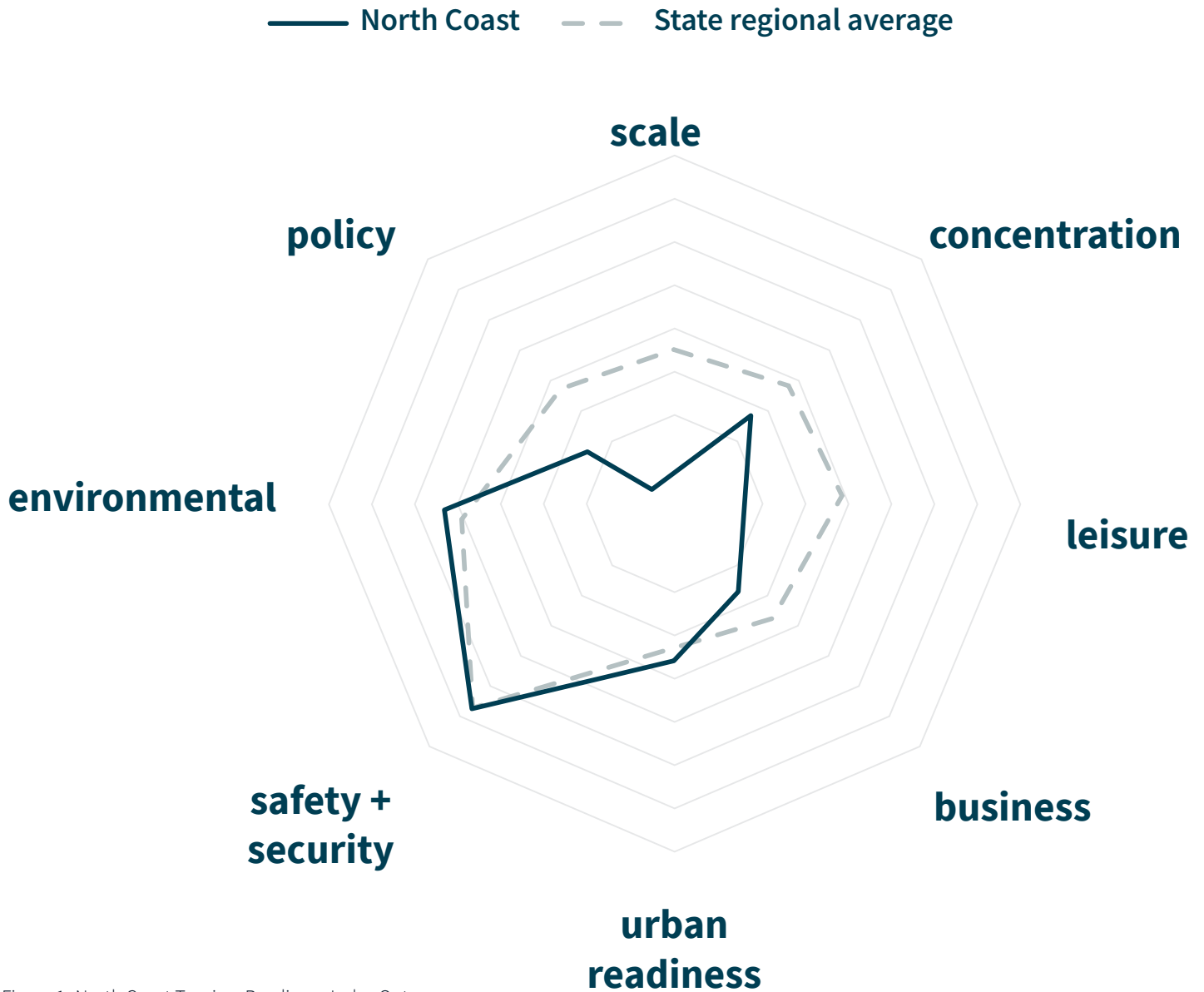


Figure 1- North Coast Tourism Readiness Index Outcome

Demand driver scorecard

Process — multi step assessment of destination assets



Utilize visitor traffic and flow data to assess current demand



Place individual assets on scale based on eight criteria to score



Rate anything that is a 6-7 or greater as the region's attractors



Utilize the outcome to identify future competitive positioning



Recommend new investment or enhancement to grow assets on the scale

Score card elements

Item	Definition	Max Point Value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy — trying to capture a moment)	20
Engaging visitor experience	Interaction between the guest and the attraction	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15
Event opportunities	Programming temporal, catalytic events	10
Venue capabilities	Easily transformed and adapted to host various functions	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5

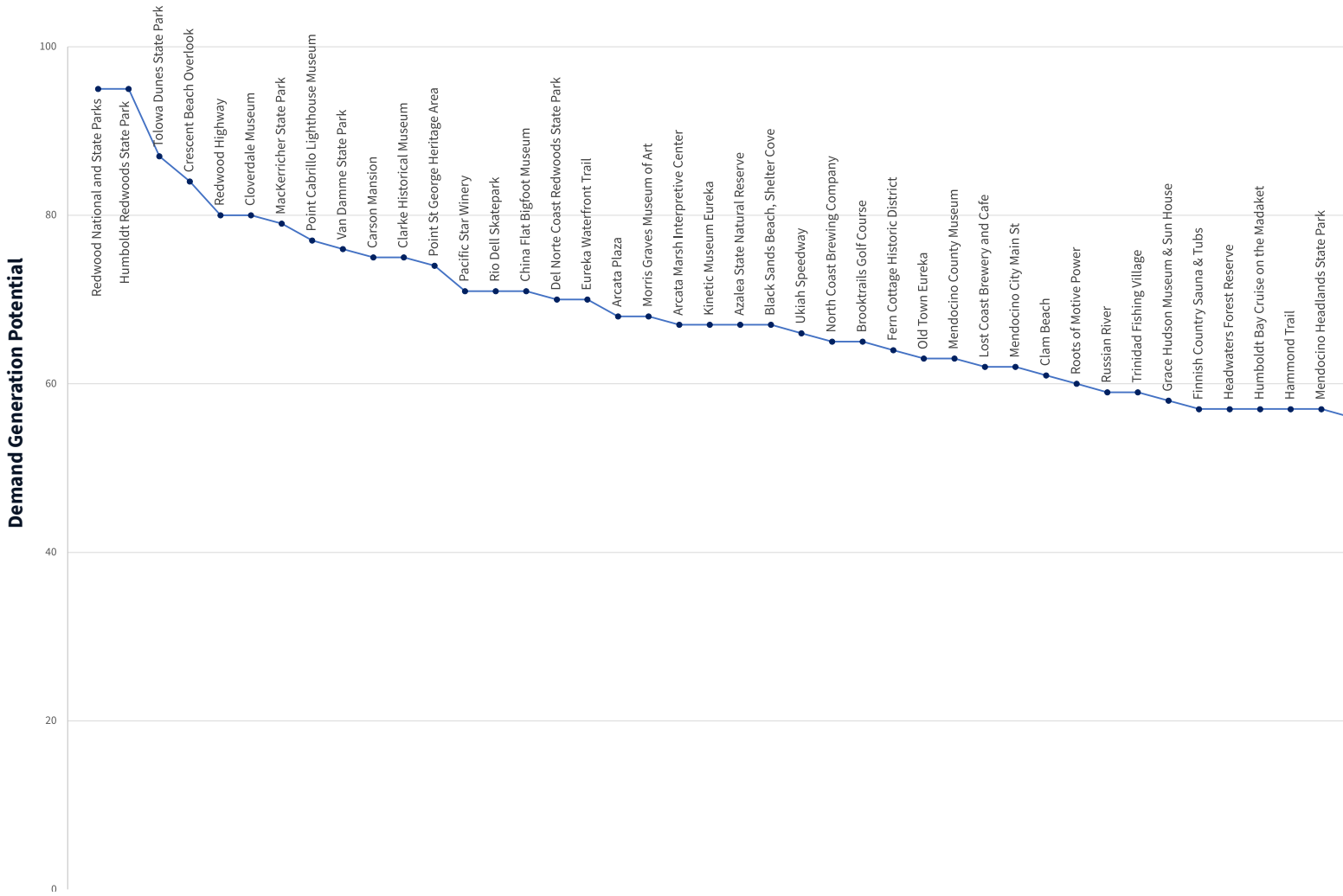
Score Card: Eiffel Tower sample scoring

Item	Definition	Score	Max Point Value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy—trying to capture a moment)	20	20
Engaging visitor experience	Interaction between the guest and the attraction	15	15
Current visitor demand	Level of visitor traffic, reviews, etc, to the asset currently	15	15
Event opportunities	Programming temporal, catalytic events	10	10
Venue capabilities	Easily transformed and adapted to host various functions	5	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5	5

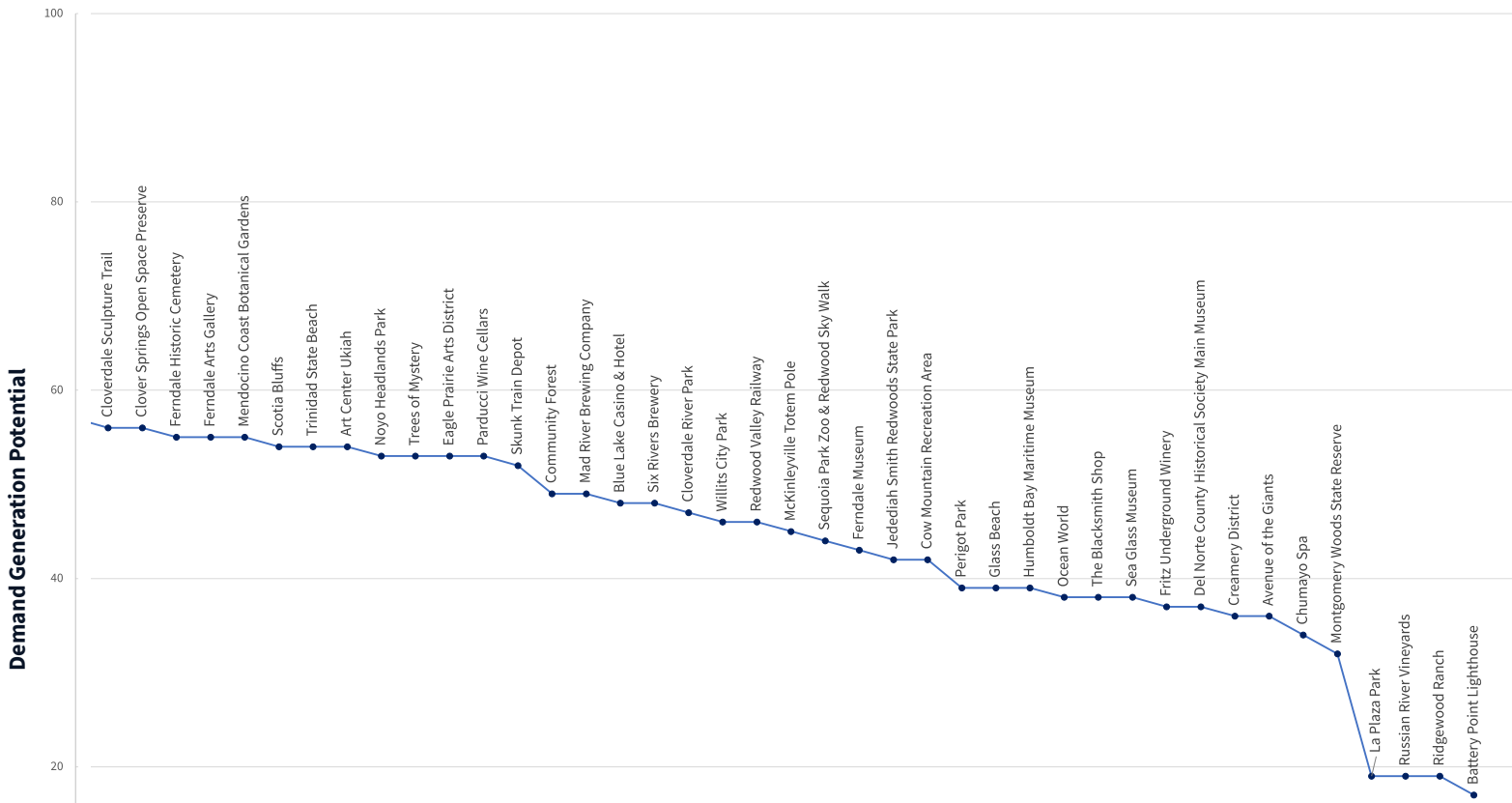


Avenue of the Giants

North Coast demand drivers



North Coast demand drivers



Event matrix

Purpose — Use criteria that drives event return to understand the current landscape of successful events and position the region to support up and coming events.



Identify key events serviced by the region



Rate events on matrix using 11 criteria



Identify those events that can grow in specific areas through matrix outcomes



Work with organizers on tactics for implementation

Program components

- Tourism promotion – destination impact
- Benefit to the destination brand
- Innovation — uniqueness
- Evidence of partnerships
- Organizational structure and management capability
- Economic impact (direct spending)
- Suitable target market(s)
- Comprehensive marketing plan/approach
- Overnight stays (room nights)
- Scale of project — future potential
- Time of year — need periods

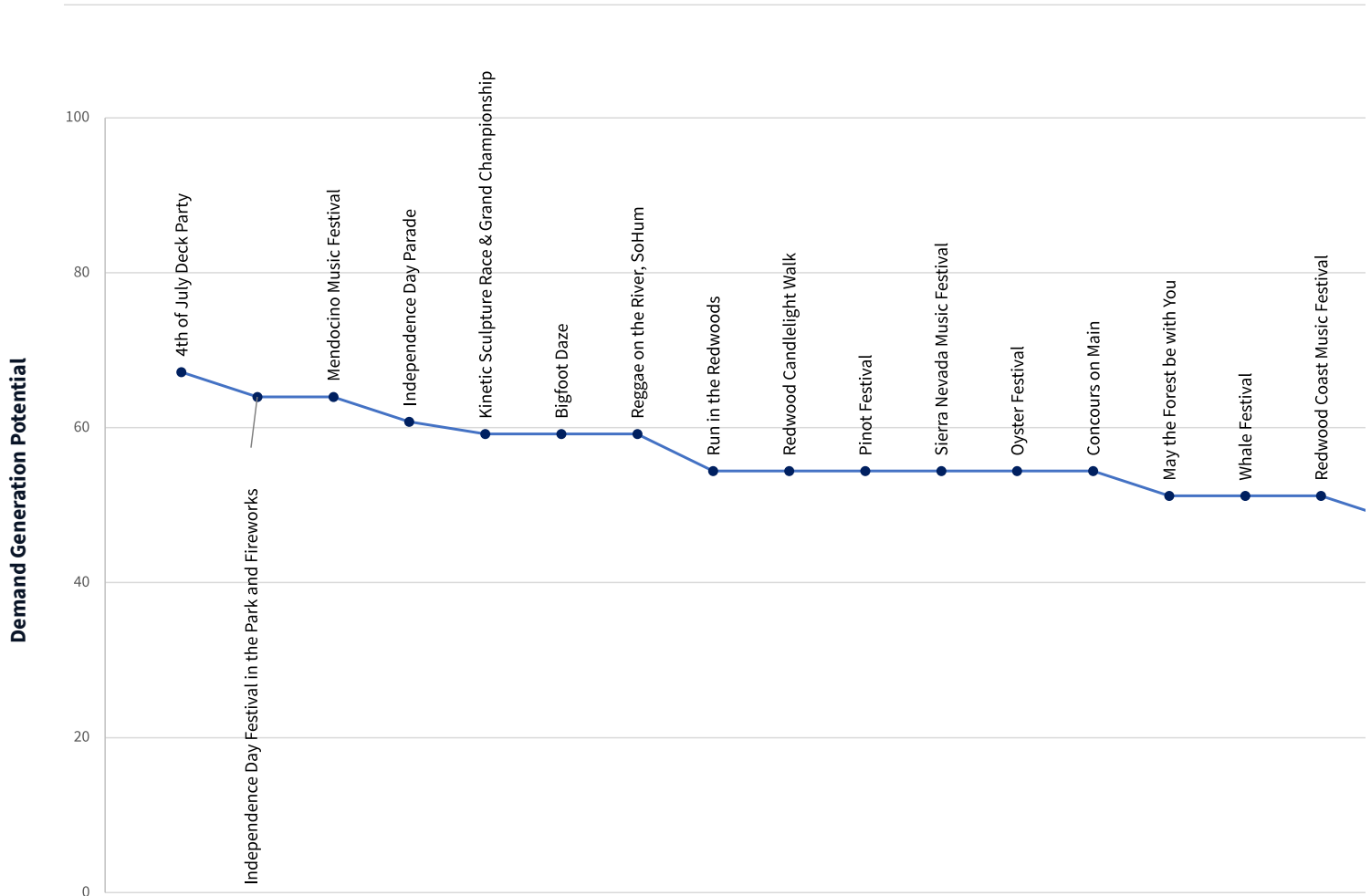


Cafe Beaujolais

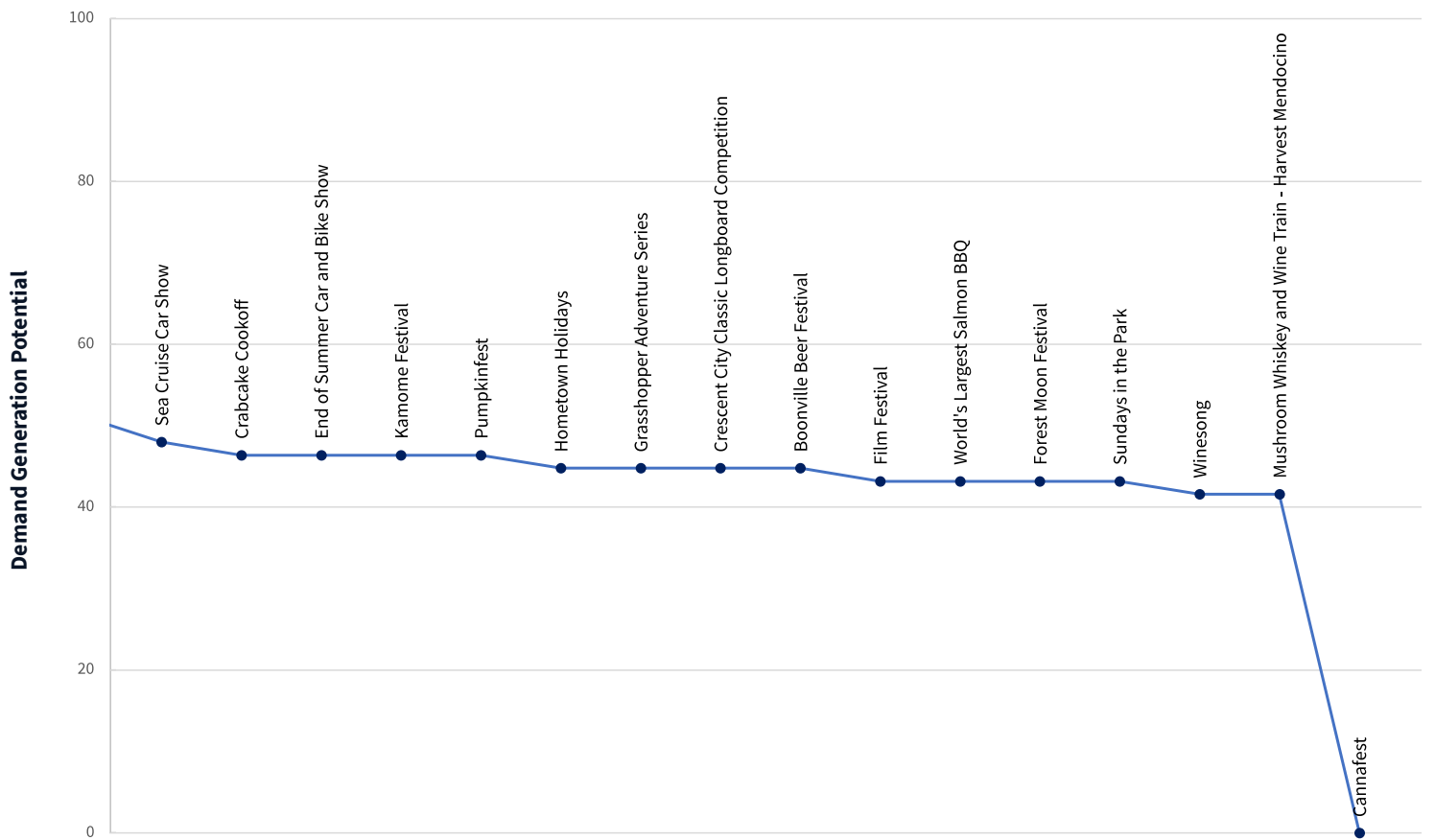
Program components

	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Program components						10
1. Tourism promotion — destination impact						10
2. Benefit to the destination brand						10
3. Innovation — uniqueness						10
4. Evidence of partnerships						10
5. Organizational structure and management capability						10
6. Economic impact (direct spending)						10
7. Suitable target market(s)						10
8. Comprehensive marketing plan/ approach						10
9. Overnight stays (room nights)						10
10. Scale of project — future potential						10
*Bonus — need periods/time of the year						
Total Maximum possible points = 100						100


North Coast Leisure Events



North Coast Leisure Events





 **JLL** SEE A BRIGHTER WAY