



visit
California

Regional strategic tourism plan

North Coast

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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



Headlands State Park

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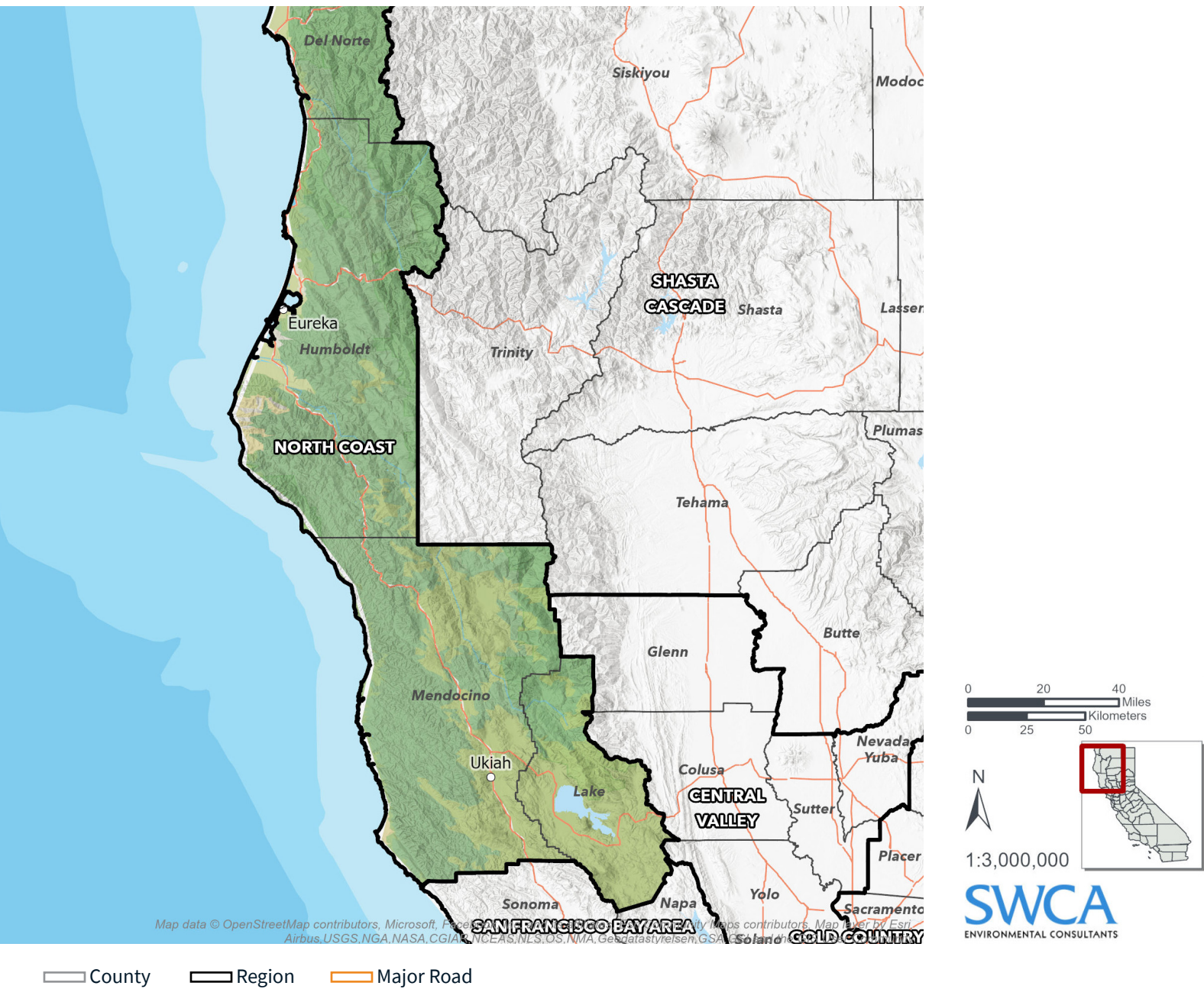
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Executive summary

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.



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.



Humboldt Redwoods State Park

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.



Big River, Mendocino

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](#).



MacKerricher State Park, Fort Bragg

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.



Downtown 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 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.



Princess Seafood Market & Deli, Fort Bragg

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.

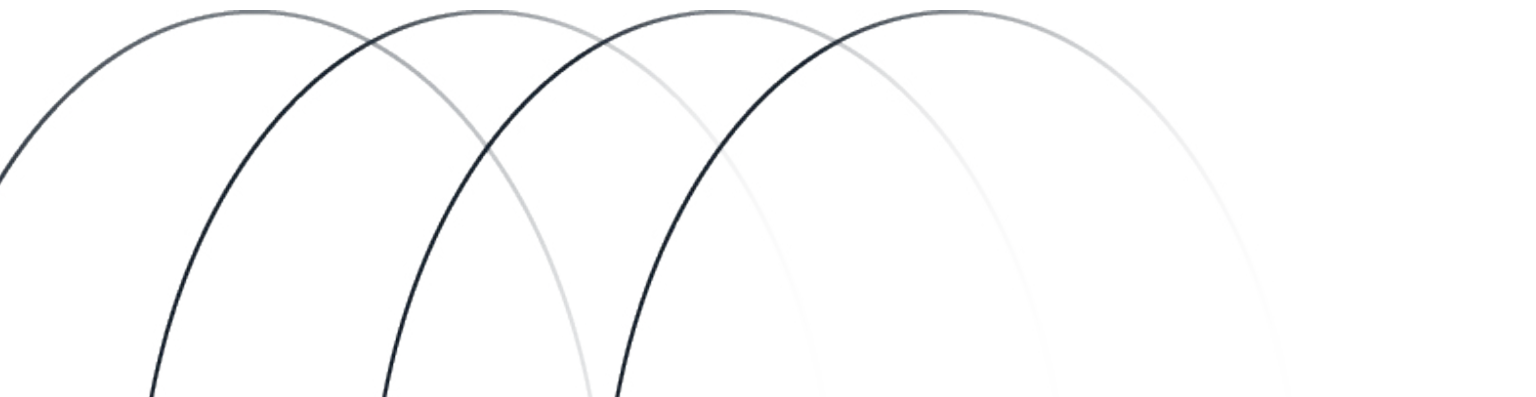
The diverse set of perspectives ensured our study comprehensively captured both the benefits and potential drawbacks of tourism. All stakeholder feedback also provided key guidance and direction to become the basis of many opportunities, supported by real-life examples from site visits.

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 complex ecosystem.
- 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

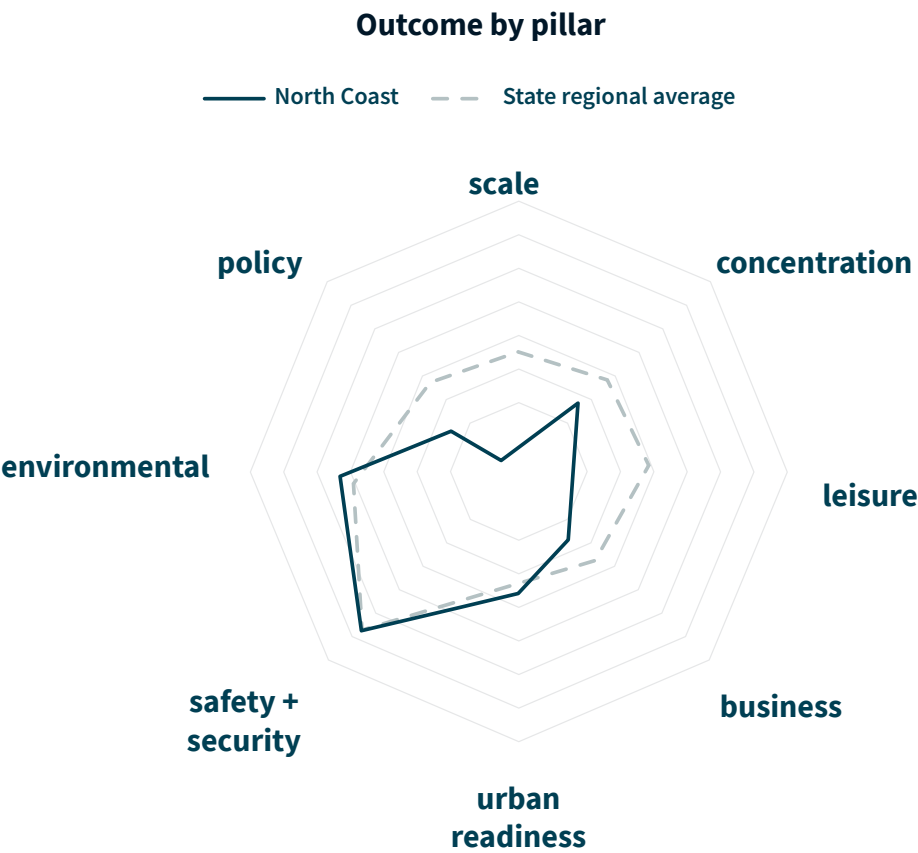
The **tourism readiness index** reveals that the North Coast surpasses state averages in three out of eight pillars, showcasing signs of strong potential to be an emerging tourism destination. Notably, the North Coast stands out when compared to other regions in the areas of environmental, safety and 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.



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.



Prairie Creek Redwoods State Park



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.



Noyo Harbor, 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.



Brassfield Estate Winery

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 CA, Visit Humboldt, Visit 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 Harbor 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, Visit 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 CA, Visit Humboldt, Visit 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 is 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 CA, Visit Humboldt, Visit 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. Any initiatives to encourage visitation to Indigenous sites should be developed in partnership with the local tribe. There should be clear, tribe-sanctioned guidelines communicated to tourists on how to respectfully engage at these sites.



Harvest Mushroom Train, Mendocino

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.



Mendocino

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County CA, Visit Humboldt, Visit 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.

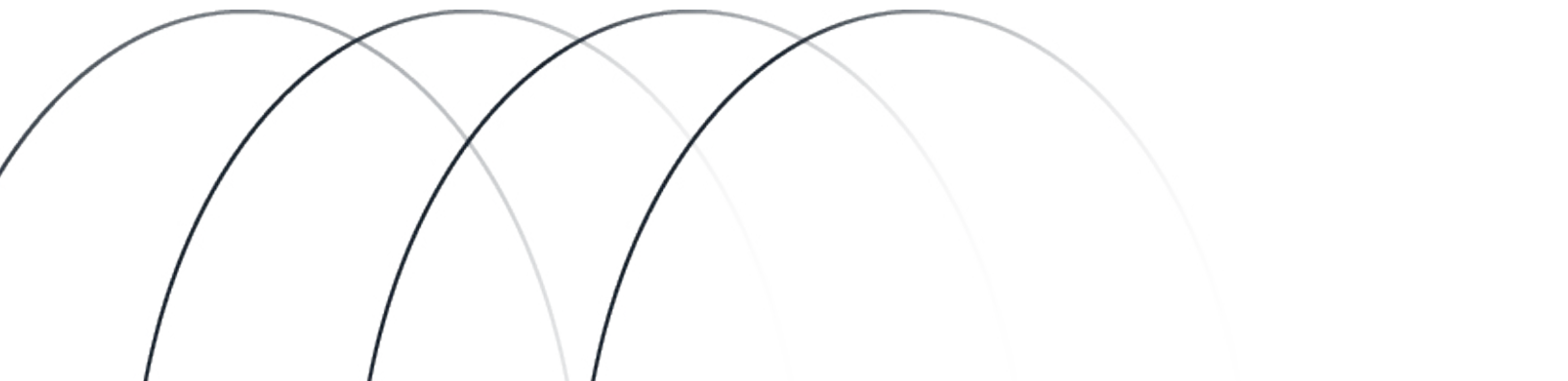
The North Coast faces challenges when it comes to retaining and attracting full-time employment. High turnover rates can disrupt operations and increase recruitment costs. Additionally, the seasonality that the region currently faces further contributes to staffing issues.

Key partners

North of Ordinary, Visit Del Norte County, Visit Mendocino, Visit Lake County CA, Visit Humboldt, Visit 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 CA, Visit Humboldt, Visit 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 the disposal 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

JLL extends its 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 CA |
| Cindy Vosburg | Visit Del Norte County |
| Debbie Thompson | Trees of Mystery |
| Jennifer Owen | North Coast Brewing Co. |
| Julie Benbow | North of Ordinary, Visit Redwoods (Humboldt) |
| Karen Gaffney | North Coast Resource Partnership |
| Katrina Kessen | Visit Ukiah |
| Lynnette Braillard | LuLish, DMO Agency for North of Ordinary and Visit Del Norte County |
| 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

JLL extends its 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 CA |
| Visit Humboldt |
| City of Eureka |
| Crescent City Visitor’s Bureau |
| Visit Ukiah |



Vichy Springs, Mendocino County

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 |



Trinidad Head

Focus group attendees

JLL extends its 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 CA |
| 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 Redwoods (Humboldt) |
| Katrina Kessen | Visit 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, DMO Agency for North of Ordinary and Visit Del Norte County |
| 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 |



Arcata Bay Oyster Festival

Stakeholder interviewees

JLL expresses its sincere thanks to 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 CA |
| 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 Redwoods (Humboldt) |
| Karen Gaffney | North Coast Resource Partnership |
| Katrina Kessen | Visit Ukiah |
| Kayla Corder | Eddy Alexander |
| Ken Hamik | Board of Directors Humboldt County Visitors Bureau |
| Lynne Butcher | Tallman Hotel & Blue Wing Saloon |
| Lynnette Braillard | LuLish, DMO Agency for North of Ordinary and Visit Del Norte County |
| 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

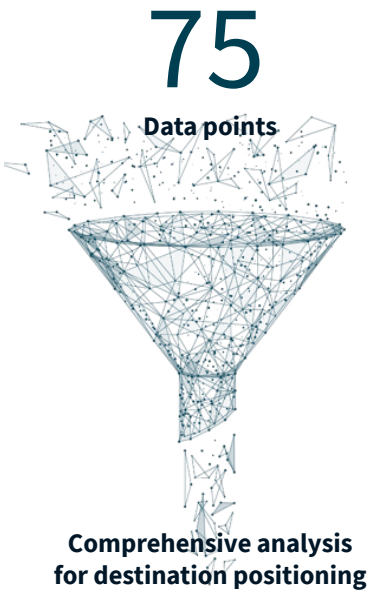
- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities’ tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach 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



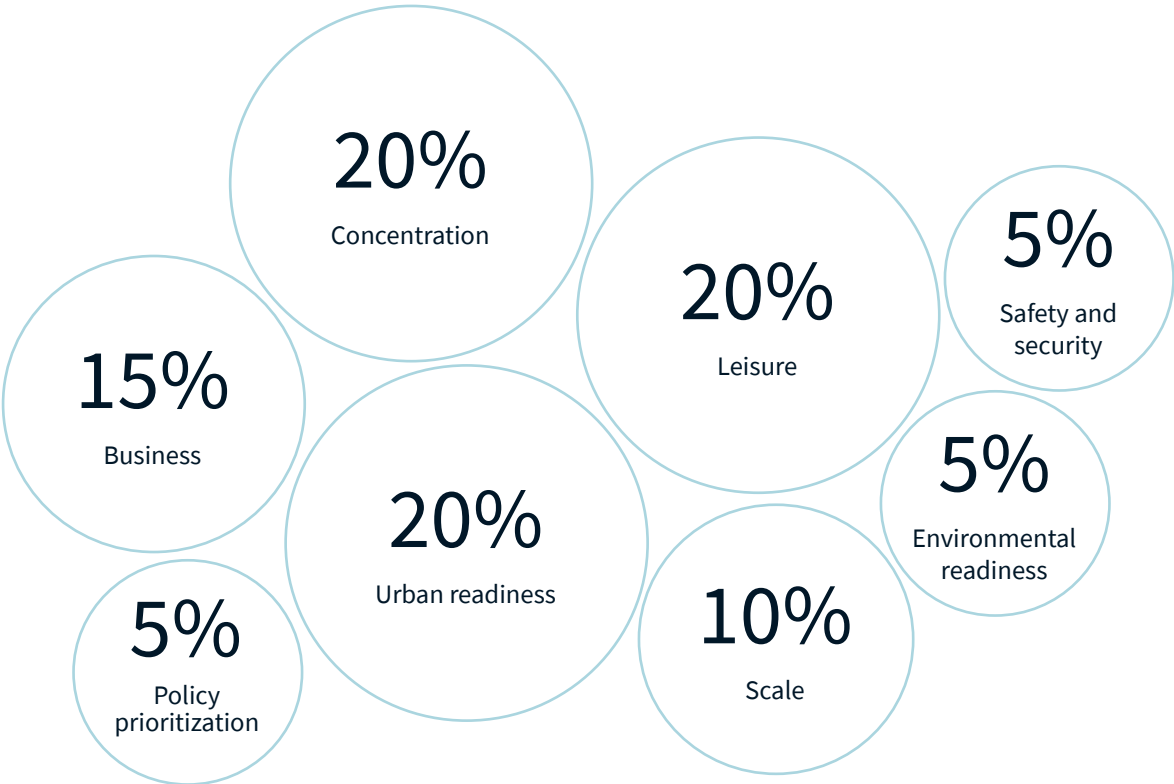
Tourism readiness index categories

- | | |
|----------------------------|--------------------------|
| 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

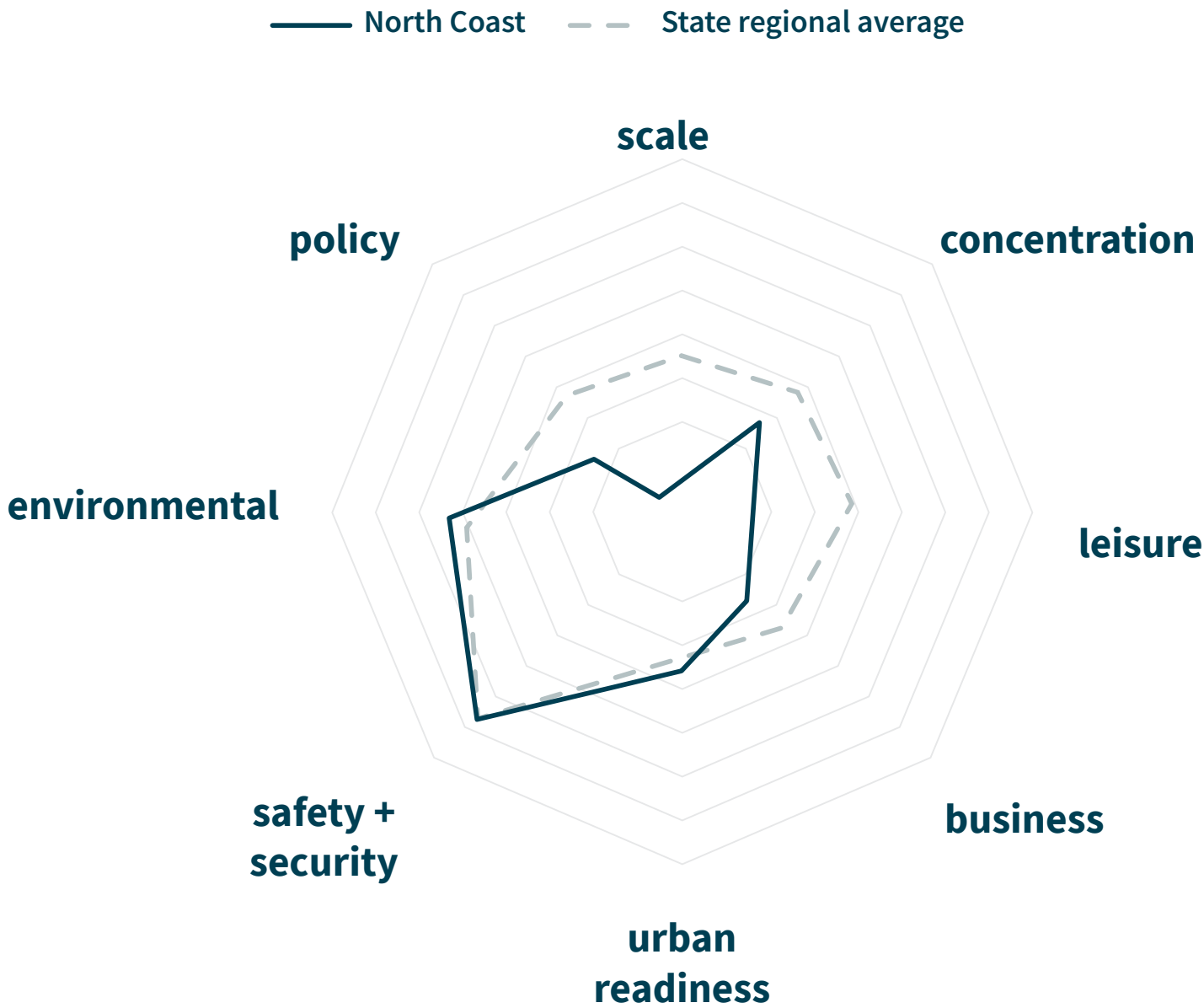
| Dawning Developers | Emerging Performers | Balanced Dynamics | Mature Performers | Managing Momentum |
|-----------------------------------|--|---|--|--|
| Limited tourism infrastructure | Growing momentum | Established infrastructure | Strong leisure and/or business travel dynamics | Historically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

Weights by category



The North Coast results

Outcome by pillar



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 |

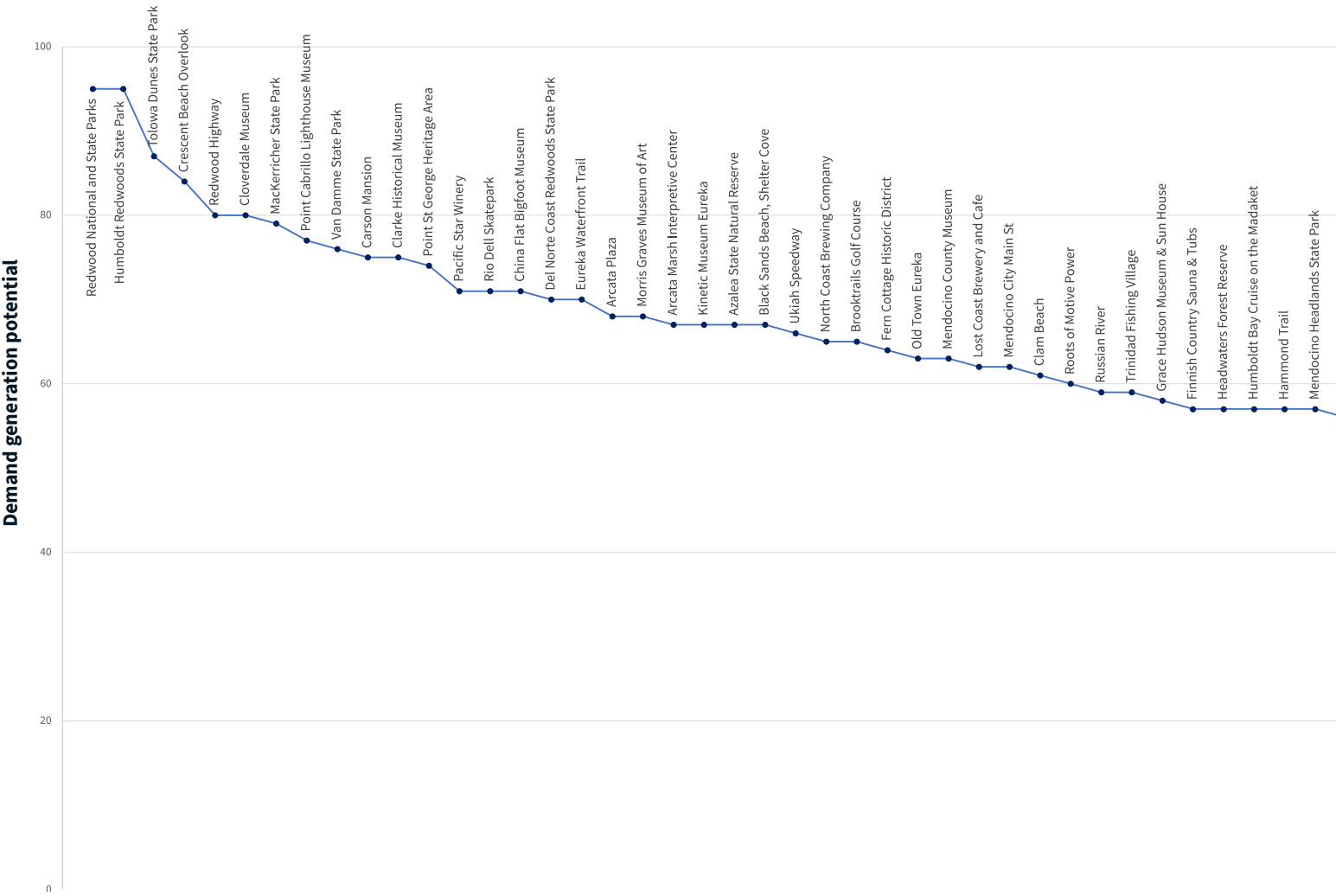
Score Card: Eiffel Tower sample scoring

| 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 |

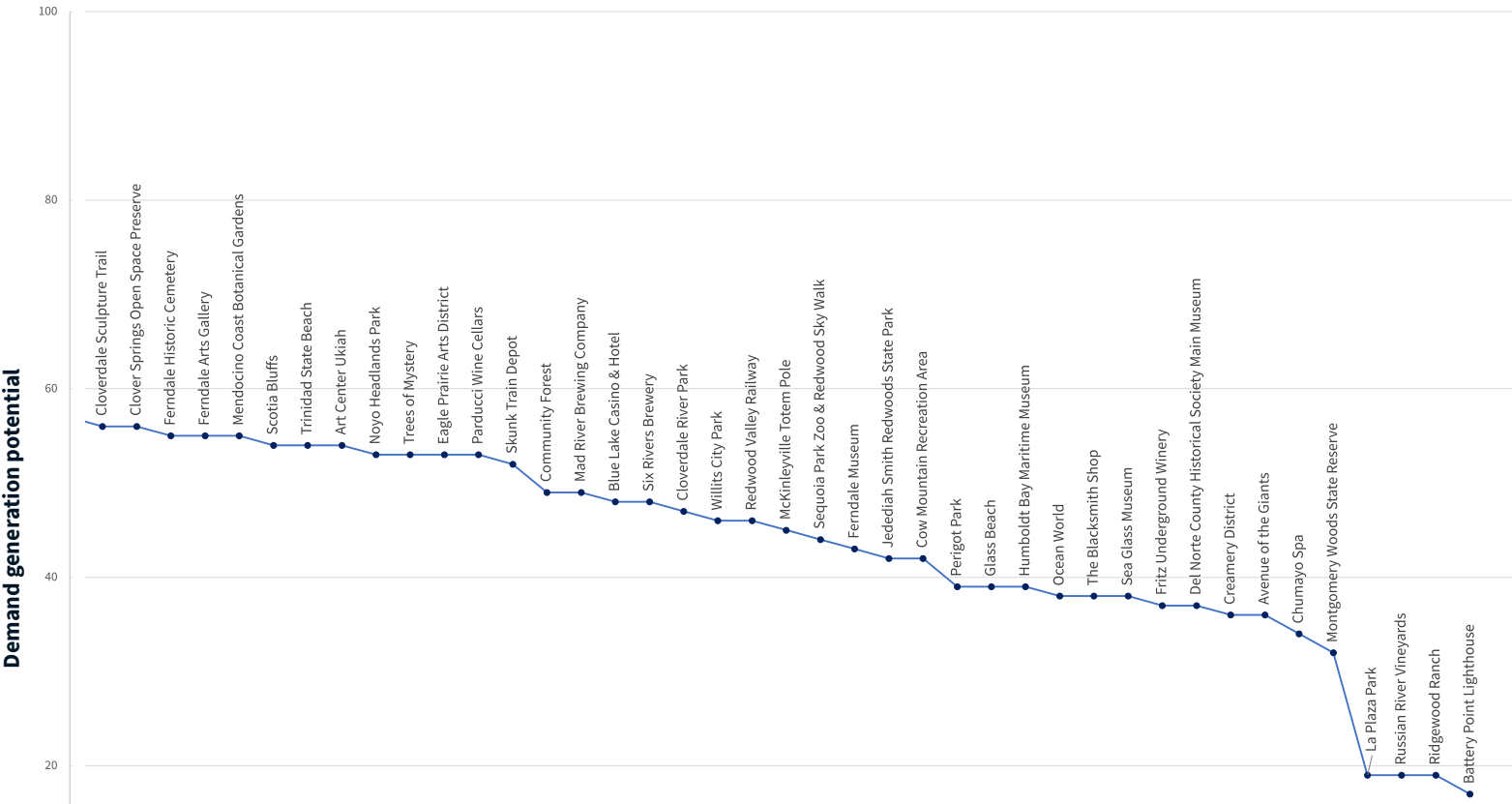


Avenue of the Giants

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

Multi-day event

Each event is scored as a single instance, regardless of duration. The evaluation, across the 10 criteria, considers the event’s overall impact and attendance. Instead of daily attendance, the Event Matrix uses criteria such as total overnight stays and the suitability of the event’s target markets. The approach to determining overnight stays involves a two-stage analysis. The first stage uses methods tailored to each event’s reporting sophistication, including reviewing event websites (for past statistics and future room block numbers), reported attendance on Destination Marketing Organization (DMO) websites, and public articles for high-profile events. In the second stage, DMO representatives and regional advisory committees qualitatively review these findings to provide feedback and revisions, validating the scoring process.

Risk

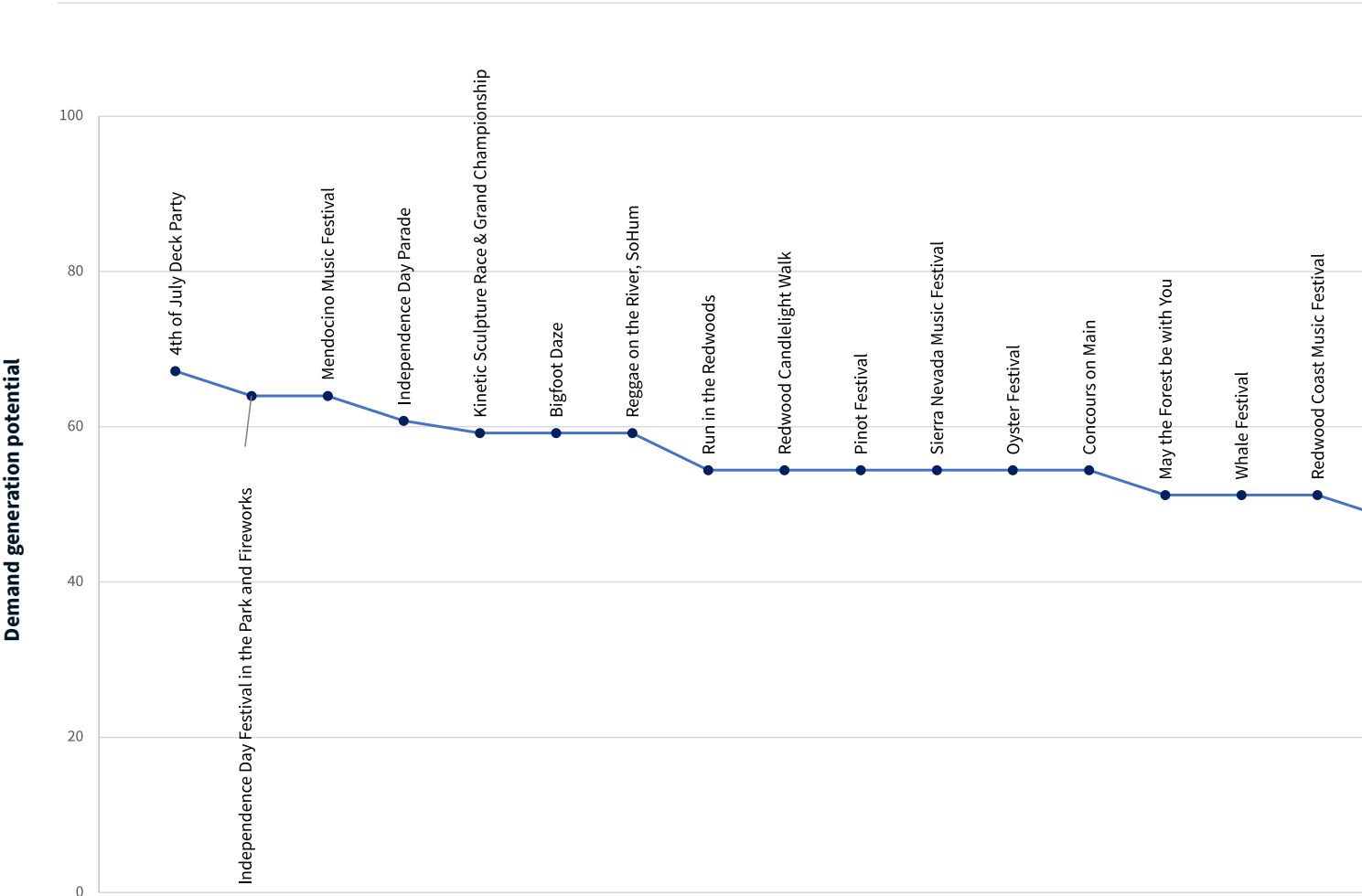
The Event Matrix tool does not directly incorporate event-related risks into final scores, as these considerations are outside its scope. However, stakeholder-identified regional risks, including public safety challenges and high liability insurance premiums due to climate-related risks have been addressed in regional plans and discussions.



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

