

June 11, 2019
Regular Meeting
Item # 7a
Community
Development

**Revised Powerpoint: Research
Report – Economic Impact of
Tourism & Visitor Profile Study**

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June 2019

Economic Impacts of Tourism & Profile of Mono County Visitors



**June 2019
DRAFT**

Visitor Research Supports Mono County Goals

- Mono County Economic Development (MCED) a department of Mono County government, works to promote tourism into Mono County by attracting visitors who generate local fiscal benefits and support tourism related employment.
- MCED conducted this research to measure visitors' economic and fiscal impacts on the countywide economy and identify key visitor attributes.
 - The results will help guide MCED and tourism industry priorities and programs.
- The study, covering calendar year 2018, includes:
 - estimated annual visitor volume and visitor spending
 - estimated annual fiscal (tax) impacts and visitor-supported employment
 - detailed profile of visitor behaviors and demographics
- The 2018 and 2008 studies used the same method:
 - quarterly intercept interviews by trained local interviewers at popular visitor sites
 - among non-local visitors, i.e., anyone who lives outside Mono County.
 - the 2018 sample totaled 1,032 respondents
- Data from the 2008 (fiscal year) study are shown in parentheses () next to the 2018 results to compare trends.
- Lauren Schlau Consulting (LSC), an experienced tourism industry specialist conducted both studies for MCED.

EXECUTIVE SUMMARY KEY OBSERVATIONS

- Mono County visitors showed strong growth from 2008 to 2018 for all indicators.
 - Length of stay was about a day lower than in 2008, a trend in tourism. May consider ways to increase stay.
- High 62% of visitors stay overnight here; while more stay in hotels overall, in Winter more visitors use other paid lodging (condos etc.). As a result condo users have highest overall spending impact of any segment.
- Half of visitors are from California – opportunity to capture more from other western states who are more likely to stay overnight in paid lodging.
- A quarter are International visitors who stay about one night, but have higher use of hotels than domestic visitors.
- Very high visitor satisfaction with their destination experience in Mono County.
- Visitors cite coming for and liking Mono County for its *scenic beauty* and *activities*, key points to highlight in messaging.
- Older visitor – in mid-40's. Most *don't* have children at home. Opportunity to lower age and attract more families with children to ensure strong future visitation.

TOPICS OF THIS PRESENTATION

1. Economic Impacts

- Overall
- Volume, Visitor Days
- Spending – Total & by Category
- Tourism Taxes Generated
- Tourism Jobs Supported

2. Visitor Profile

- Trip behaviors
- Lodging
- Travel group
- Demographics

Section I

Overall Visitor Impacts - Volume, Spending ,Tax, Employment Indicators

MONO COUNTY TOURISM OVERALL INDICATOR SUMMARY - 2018 vs. 2008

- Annual total of 1.7 million Mono County visitors (versus 1.5 million in 2008)
- Annual 4.15 (4.70) million visitor days, a 12% decrease due to lower average stay, 2.4 days versus 3.1 days in 2008
- Total visitor (direct) spending of \$601.3 (\$369) million
- Daily average spent in Mono County \$410 (\$238) per-group and \$145 (\$79) per-capita
- Lodging and retail taxes of \$23.7 (\$16.6) million

Table 1 – Mono County (countywide) 2018 & 2008 Summary Tourism Indicators

Indicator	2018		2008
	Number	% Change	
Total Number of Visitors	1,730,500	14.2%	1,515,200
Average Length of Stay (days, all visitors)	2.4	- 22.6%	3.1
Total Visitor Days	4,150,300	- 11.7%	4,702,700
Total Annual Visitor Spending	\$601,331,688	62.7%	\$369,560,000
Daily Visitor Spending: per-group / per-capita	\$410 / \$145	72.3% / 83.5%	\$238 / \$79
Transient occupancy tax (countywide)	\$21,543,700	43.0%	\$15,062,900
Visitor Retail Sales Tax Revenue (countywide)	\$2,173,200	45.2%	\$1,496,600
Equivalent tax per Mono County household from visitor taxes ¹	\$3,900	34.5%	\$2,900
Jobs Supported by Tourism countywide ²	5,300	17.8%	4,500

Source: Lauren Schlau Consulting and CIC Research Inc

¹ 5,768 Mono County households in 2010 (U.S. Census) adjusted to 2018

² Workforce of 6,500 full-time equivalent jobs

6 IN 10 VISITORS STAYING OVERNIGHT IN MONO COUNTY

- 62% (64%) or 1.1 million (965,000) stayed overnight here, while 38% (36%) or 657,600 (550,000) were day visitors.
- All visitors generated 4.1 (4.7) million annual visitor days* in Mono County, based on an overall mean 2.4 (3.1) days length of stay.
 - Overnight visitors spent 3.5 (4.2) million visitor days or 84% (88%) of total visitor days.
 - Day visitors with 657,600 (550,000) visitor days (based on their one-day stay), comprised 16% (12%) of visitor days.
- Of the total \$601 (\$369) million spent in Mono County,
 - overnight visitors spent \$577 (\$354) million or 96% of the total spending
 - day visitors spent \$24.6 (\$15.8) million or 4% of total spending both years

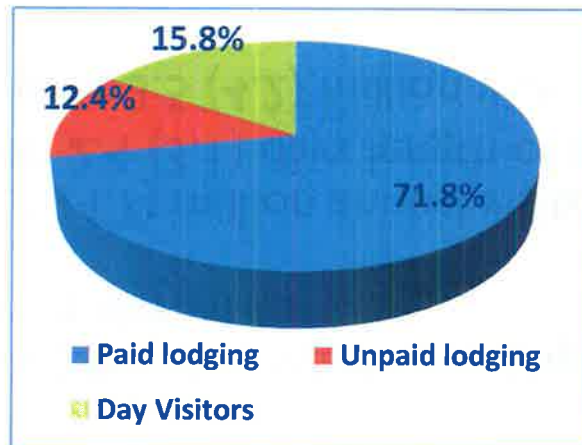
* visitor volume x average days stayed = visitor days

PAID LODGING SEGMENT SPENDING SHARE FAR OUTWEIGHS THEIR VOLUME SHARE

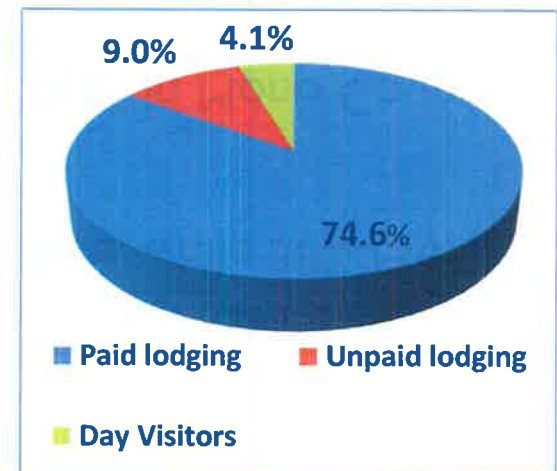
Exhibit 1a – Visitor Volume



Exhibit 1b – Visitor Days



**Exhibit 1c -
Visitor Spending**

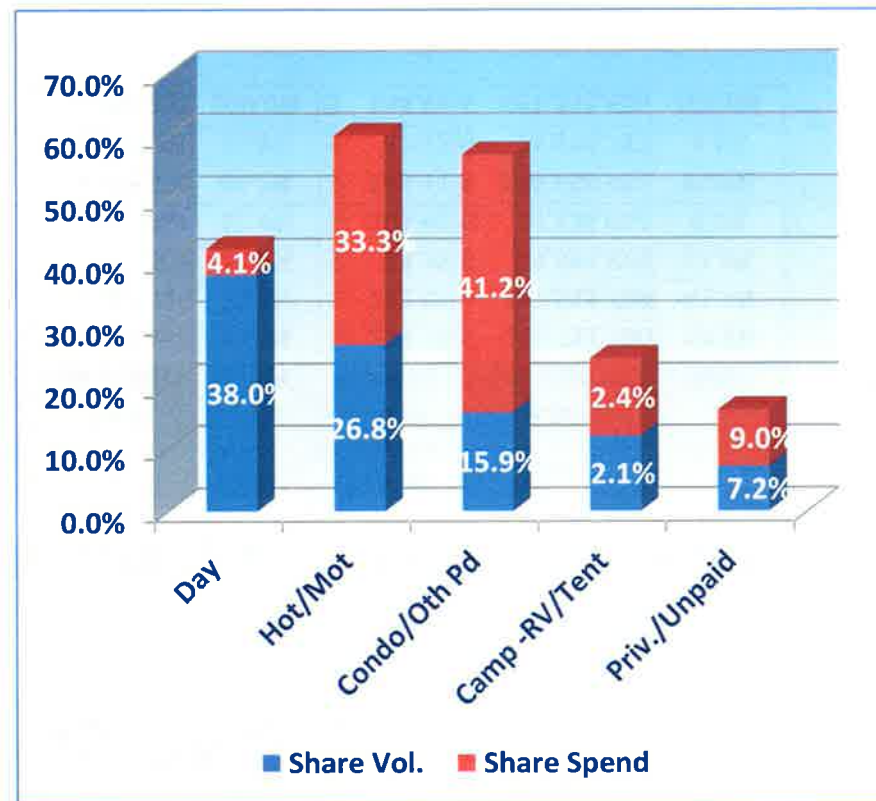


CONDO USERS HIGHEST SPENDING SEGMENT

A further level of analysis divides visitors into five segments by lodging type in Mono County.

- Visitors who stayed in condos/other paid lodging accounted for a total of \$248 (\$153) million or 41% of total spending both years.
- Guests lodging overnight in hotels/motels/inns, spent \$200.3 million in total or 33% of the total.
- Campers in RVs/tents accounted for \$74.3 million or 12% of the total
- Visitors lodging in private residences (unpaid) spent \$54.3 million, or 9% of the total.

Exhibit 2 – Volume and Spending Share



INDICATORS BY LODGING SEGMENT - 2018

Table 2 – Mono Co. Tourism Indicators by Lodging Segment – 2018

Visitor Category	Individual Visitors	Ratio	Avg. Stay in Mono Co. (Days)	Total Visitor Days	Ratio	Average Daily Per Capita Spending	Total Annual Expenditures*	Ratio
Hotel/motel/inn	463,467	26.8%	1.89	874,162	21.1%	\$ 229.15	\$ 200,312,290	33.3%
Condo Rental/Other Paid	274,961	15.9%	4.25	1,167,926	28.1%	\$ 212.01	\$ 247,613,788	41.2%
Campground/RV Park	209,630	12.1%	4.47	937,500	22.6%	\$ 79.35	\$ 74,394,819	12.4%
Private Home/Other Unpaid	124,799	7.2%	4.11	513,061	12.4%	\$ 105.91	\$ 54,336,054	9.0%
Subtotal Overnight Visitors	1,072,856	62.0%	3.26	3,492,650	84.2%	\$ 165.11	\$ 576,656,951	95.9%
Day Visitors	657,601	38.0%	1.00	657,601	15.8%	\$ 37.52	\$ 24,674,737	4.1%
Total Visitors	1,730,457	100.0%	2.40	4,150,251	100.0%	\$ 144.89	\$ 601,331,688	100.0%

TOTAL & PER-CAP DAILY SPENDING BY CATEGORY

- Visitors spent \$225 (\$118) million on **Lodging**, 37% (32%) of the total and \$54 average per-person per day
- Spending for **meals out** was \$132 (\$63) million, 17% of the total or \$32 (\$14) daily per-person.
- **\$49 (\$17) million** was spent for beverages, 8% of the total, and \$12 per-person
- **Admissions/attractions** totaled **\$73 (\$44) million**, or 12% (12%) of the total and \$18 (\$9) average per-person.
- **Groceries/supplies/incidentals** reached \$49 (\$30) million, 8% (8%) of the total, or \$12 (\$6) daily per-person.
- **Retail shopping** was \$33 (\$31) million, or 5% (8%) of the total, an average of \$8 (\$7) per-day.
- **Local transportation** (fuel, parking, etc.) was \$26 (\$50) million, or 4% (14%) of the total.
- \$15 (\$16) million was spent on **activities/recreation**, \$4 (\$3) per person per day.

Table 3 – Visitor Spending by Item Category

Spending Category	Daily Per Capita Spending ¹	Total Annual Spending ²	Total Ratio
Lodging	\$ 54.13	\$ 224,663,388	37.4%
Meals	\$ 31.69	\$ 131,513,981	21.9%
Attractions/admissions	\$ 17.66	\$ 73,282,846	12.2%
Groceries & Other	\$ 11.85	\$ 49,199,385	8.2%
Beverages	\$ 11.70	\$ 48,544,903	8.1%
Shopping/gifts	\$ 8.00	\$ 33,184,970	5.5%
Daily Transport/Parking	\$ 6.34	\$ 26,294,306	4.4%
Activities	\$ 3.53	\$ 14,647,909	2.4%
Total	\$ 144.89	\$ 601,331,688	100.0%

¹ per-capita spending allocated across all visitors whether or not they spent in a category

² includes taxes and tips

2018 VISITOR SPENDING BY CATEGORY & LODGING TYPE

Table 4a – Visitor Spending by Visitor (Lodging) Type 2018

Spending Category	Hotel Visitors			Condo/Rental/Other Paid			Campground Tent//RV		
	Daily Per Capita Spending	Total Annual Spending*	Ratio	Daily Per Capita Spending	Total Annual Spending*	Ratio	Daily Per Capita Spending	Total Annual Spending*	Ratio
Lodging	\$ 119.98	\$104,885,129	52.4%	\$ 86.28	\$ 100,766,434	40.7%	\$ 20.28	\$ 9,011,824	25.6%
Meals	\$ 49.92	\$ 43,635,910	21.8%	\$ 36.79	\$ 42,972,527	17.4%	\$ 24.07	\$ 22,566,668	30.3%
Beverages	\$ 14.37	\$ 12,561,745	6.3%	\$ 18.92	\$ 22,099,946	8.9%	\$ 6.39	\$ 5,993,930	8.1%
Shopping/gifts	\$ 9.62	\$ 8,409,446	4.2%	\$ 12.08	\$ 14,109,420	5.7%	\$ 4.29	\$ 4,020,495	5.4%
Attractions/admissions	\$ 13.91	\$ 12,158,626	6.1%	\$ 31.05	\$ 36,268,342	14.6%	\$ 4.31	\$ 4,043,121	5.4%
Activities/recreation	\$ 2.22	\$ 1,939,524	1.0%	\$ 6.68	\$ 7,799,566	3.1%	\$ 3.24	\$ 3,041,847	4.1%
Local transportation	\$ 8.55	\$ 7,477,855	3.7%	\$ 4.35	\$ 5,076,624	2.1%	\$ 4.97	\$ 4,660,142	6.3%
Groceries & Other	\$ 10.57	\$ 9,244,055	4.6%	\$ 15.86	\$ 18,520,929	7.5%	\$ 11.79	\$ 11,056,791	14.9%
Total	\$ 229.15	\$ 200,312,290	100.0%	\$ 212.01	\$ 247,613,788	100.0%	\$ 79.35	\$ 74,394,819	100.0%

2018 VISITOR SPENDING BY CATEGORY & LODGING TYPE

Table 4b – Visitor Spending by Visitor (Lodging) Type 2018

Spending Category	Private Home & Other Unpaid Overnight			Day Visitors		
	Daily Per Capita Spending	Total Annual Spending*	Ratio	Daily Per Capita Spending	Total Annual Spending*	Ratio
Lodging	\$ -	\$ -	0.0%	\$ -	\$ -	Ratio
Meals	\$ 26.70	\$ 13,699,173	25.2%	\$ 13.14	\$ 8,639,704	35.0%
Beverages	\$ 12.38	\$ 6,353,663	11.7%	\$ 2.34	\$ 1,535,619	6.2%
Shopping/gifts	\$ 5.51	\$ 2,827,307	5.2%	\$ 5.81	\$ 3,818,302	15.5%
Attractions/ Admissions	\$ 36.81	\$ 18,884,406	34.8%	\$ 2.93	\$ 1,928,350	7.8%
Activities	\$ 3.32	\$ 1,701,422	3.1%	\$ 0.25	\$ 165,550	0.7%
Daily Transport/Parking	\$ 7.24	\$ 3,713,339	6.8%	\$ 8.16	\$ 5,366,347	21.7%
Groceries & Other	\$ 13.95	\$ 7,156,743	13.2%	\$ 4.90	\$ 3,220,866	13.1%
Total	\$ 105.91	\$ 54,336,054	100.0%	\$ 37.52	\$ 24,674,737	100.0%

* Includes taxes and tips

DIRECT + INDIRECT IMPACTS = \$841 MILLION

- The \$601.3 (\$369.6) million of visitor spending in Mono County represents the direct level.
- Additional indirect spending accrues countywide from local goods and services purchased by the local tourism industry and by tourism industry employees using visitor generated earnings.
- A "multiplier" estimates additional levels of spending through the local economy.
 - Mono County's multiplier is estimated at a 1.4, reflecting its relative isolation where more purchasing would be made within the County.
- Applying the multiplier to direct visitor spending yields an additional \$240 (\$148) million to the countywide economy, for total of direct and indirect spending impact of \$842 (\$517) million.

Table 5 - Spending Multiplier Impact

	2018	2008
Total Direct Visitor Spending	\$601,331,700	\$369,560,000
Multiplier	1.4	1.4
Additional Impact	\$240,532,700	\$147,824,000
Total Direct + Indirect + Induced Impact	\$841,864,400	\$517,384,000

VISITORS GENERATED \$24 MILLION OF TAX REVENUE COUNTYWIDE

- Direct visitor spending generated a total of \$23.6 (\$16.4) million in/to the county in local taxes from total *taxable* visitor spending \$473.2 (\$267.8) million.
- The \$21.5 (\$15.1) million of transient occupancy tax represented 91% (91%) of visitor-generated taxes reflecting the fiscal impact of lodging.
 - Of the total lodging tax, \$18 million was in Mammoth Lakes; \$3.5 million was in Mono County
- Another \$2.2 (\$1.3) million was retail tax.
- The \$23.6 (\$16.4) million in visitor taxes equates to an average of \$3,900 (\$2,900) per each of Mono County's 6,000 (5,650) households, funding services benefiting all county residents.

Table 6 – Visitor Generated Taxes *

Category	2018		% Chg.	2008	
	Tax Revenue	Ratio		Tax Revenue	Ratio
Lodging (TO) Tax	\$ 21,453,700	90.8%	42.4%	\$15,062,900	91.0%
Retail Sales	\$ 2,173,200	9.2%	45.2%	\$ 1,496,600	9.0
Total	\$ 23,626,900	100.0%	42.7%	\$16,559,500	100.0%

* other visitor generated taxes and fees, e.g., property, utility, business license are excluded from this study.

VISITORS SUPPORTED 5,300 JOBS COUNTYWIDE

Visitor spending supports tourism employment.

- An estimated 5,340 jobs were supported by visitor spending and activity.
- Of these, 2,000 or 38% were in recreation/attractions and over 1,200 or 23% in lodging.
- In 2018 Mono County had an estimated 6,500 (7,200 for 2008) total jobs. ²
- On this basis tourism supported employment accounted for 82% (62%) of countywide employment.
- This is well above the 5 – 10% rate found typically across the state and reflects the importance of tourism to Mono County employment.

Table 7 – Visitor Supported Countywide Jobs

Taxable Category	Direct Tourism Jobs	Ratio of Total Jobs
Lodging	1,247	23.3%
Meals	827	15.5%
Beverages	305	5.7%
Shopping/gifts	140	2.6%
Attractions/Admissions	2,035	38.1%
Activities	407	7.6%
Daily Transport/Parking	160	3.0%
Groceries & Other	218	4.1%
Total	5,340	100.0%

*Lauren Schlau
Consulting*

Section 2

Mono County Visitor Profile

VISITOR ORIGIN RESIDENCE

- Nearly half 48% were California residents, 28% came from Other U.S. areas with 24% International in origin.
- A higher share of International visitors, 44% stayed in Hotel lodging relative to their share of the total.
- A far higher share of fishing visitors and those hiking were Californians relative to their share of the total.

Table 8 – Overall Residence

	Total Visitor	Activities		MC Lodging		
		Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base: Visitor	1032	298	199	410	195	169
California	47.7%	67.2%	83.0%	34.5%	69.9%	61.6%
Other U. S. (excl. CA)	27.9%	19.5%	16.1%	21.6%	17.8%	27.4%
Another country	24.4%	13.4%	0.9%	43.9%	12.3%	10.9%

- Of U.S. residents, California was #1 state for all segments with Nevada second and Oregon third.
- Note lower share of Californians in Hotels and their higher share in Other paid lodging relative to their share of the total.

Table 9 – Residence by State

	Total Visitor	Activities		MC Lodging	
		Hike	Fish	Hot/Mot/Inn	Other paid
Base: U.S. Resident	797	257	197	246	171
California	63.1%	77.5%	83.7%	61.5%	79.7%
Nevada	13.3%	5.1%	7.4%	13.5%	6.7%
Oregon	4.5%	2.0%	1.1%	6.8%	1.1%
Utah	1.6%	0.3%	0.0%	2.8%	0.2%
North Carolina	1.6%	0.4%	0.8%	0.1%	0.5%
Arizona	1.3%	1.8%	1.8%	1.5%	2.0%
New Mexico	1.1%	0.2%	0.5%	0.7%	1.6%
Texas	1.1%	1.1%	0.7%	3.1%	0.2%
West Virginia	1.0%	0.1%	0.0%	0.0%	0.0%
Florida	1.0%	0.0%	0.0%	1.0%	0.5%
Top 10	89.6%	88.5%	96.0%	91.0%	92.5%

CALIFORNIA RESIDENT AREAS VARY BY SEASON

- Overall, 62% were from the state's Southern areas with 17% from Central and 21% from Northern California.
- While Southern Cal is by far the highest feeder in each season, higher shares of Central Californians came in Spring and Summer than in other seasons.
- As well Northern California was strongest in Winter.
- Of Southern California markets, 23% were from greater L A, and rose to 29% in Winter.
- As well, overall 8% were from Orange County but at 17% in Winter.

Table 10 – California Feeder Markets

	Total Visitor	Season			
		Winter	Spring	Summer	Fall
Base: California residents	513	145	129	87	152
Central LA	12.2%	13.7%	17.6%	6.6%	7.8%
Bakersfield/ Mojave	11.4%	6.1%	15.1%	7.7%	13.2%
LA Valley Areas	10.7%	15.6%	4.7%	11.6%	14.0%
San Bernardino-Riverside	10.5%	6.8%	11.4%	10.9%	11.8%
San Diego	9.0%	8.2%	7.6%	9.8%	11.0%
Orange County	7.8%	16.5%	3.2%	11.3%	4.7%
Net Southern Cal	61.6%	66.9%	59.6%	57.9%	62.5%
San Joaquin Valley/ Stockton	7.7%	0.9%	15.3%	5.2%	4.6%
Central Coast	7.3%	4.9%	3.3%	16.1%	8.6%
Montry/Sta Cruz/Sn Jose/Palo Alto	2.2%	0.5%	2.0%	2.9%	3.4%
Net Central Cal	17.2%	6.3%	20.6%	24.2%	16.6%
Oakland/ East Bay	7.5%	10.1%	7.4%	2.3%	9.0%
Northern California	5.3%	7.1%	6.5%	4.9%	2.7%
Sacramento Area	5.0%	6.1%	3.4%	6.2%	5.4%
San Francisco	3.4%	3.4%	2.4%	4.6%	3.9%
Net Northern Cal	21.2%	26.7%	19.7%	18.0%	21.0%

EUROPE BY FAR LEAD INT'L FEEDER

- Half, 51% of International visitors were from Europe, with 16% from Asia and 8% from the U.K.
- Of visitors in Mono County for outdoor recreation, 21% were from the U.K. second after Europe for this segment and well above their share of the total.

Table 11 – Country/Region of Residence

	Total Visitor	Purposes (all)	MC Lodging
		Outd. Rec.	Hot/Mot/Inn
Base: Non-U.S. Residents	235	58	164
Europe	51.1%	58.3%	57.1%
Asia	15.5%	5.4%	13.7%
Utd. Kingdom/Ireland	8.4%	20.9%	9.2%
Australia/ New Zealand	6.7%	4.9%	6.0%
Scandinavia (Den, Fin, Ice, Nor, Swe)	5.4%	0.0%	5.1%
Asia Pacific (Indonesia, Philippines, other)	4.9%	4.9%	3.8%
Western Canada	2.0%	1.1%	1.3%
Middle East	0.6%	1.1%	0.9%
South America	0.6%	0.0%	1.3%
Eastern Canada	0.3%	1.6%	0.0%
Mexico/Central America	0.3%	1.6%	0.6%
Africa	0.1%	0.0%	0.2%
Other (not listed above)	4.2%	0.0%	0.8%

MONO COUNTY MAIN DESTINATION FOR NEARLY HALF; VARIES BY ORIGIN & SEASON

Table 12 – Main Destination

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
MONO COUNTY	45.2%	58.1%	42.8%	35.7%	46.9%	70.5%	37.4%	4.6%	65.3%	85.4%
Calif. and/or other Western States	15.5%	7.8%	11.8%	26.4%	16.2%	0.7%	12.4%	47.8%	6.2%	2.0%
Yosemite National Park	10.7%	0.9%	9.2%	16.8%	13.8%	6.5%	11.9%	17.3%	9.3%	2.4%
Reno, Tahoe or Las Vegas Nevada	6.3%	12.8%	7.5%	3.3%	3.1%	8.6%	4.0%	4.4%	1.3%	0.7%
Other Eastern Sierra areas along Highway 395	5.9%	3.7%	8.6%	2.8%	6.6%	7.8%	7.1%	0.9%	9.2%	6.3%
All California	4.8%	0.0%	7.9%	6.1%	3.2%	1.7%	6.3%	9.0%	5.6%	1.6%
USA (California plus other areas)	4.0%	0.3%	4.6%	7.0%	3.4%	0.3%	4.9%	10.2%	1.8%	0.7%
Southern California areas (Santa Barbara to San Diego)	2.9%	6.3%	1.6%	0.9%	3.7%	0.1%	9.3%	0.9%	0.2%	0.3%
Death Valley	1.5%	7.8%	0.1%	0.2%	0.0%	1.0%	3.3%	0.3%	0.0%	0.0%
Other Northern California area (SFO, Tahoe, etc.)	1.4%	1.2%	1.9%	0.2%	1.9%	0.9%	2.0%	1.8%	0.4%	0.3%
Other Nevada or Western States areas	1.0%	0.7%	1.2%	0.5%	1.3%	0.3%	1.2%	2.2%	0.3%	0.4%
All other areas (not listed above)	1.0%	0.3%	2.7%	0.2%	0.0%	1.7%	0.2%	0.5%	0.5%	0.0%

62% PAST VISITORS; MORE FIRST-TIMERS IN SUMMER & INT'L VISITORS

- In past three years all visitors took about 1 trip here in the past three years but repeat visitors came about 3 times, or 1 once a year on average.
- More trips taken here in Winter by past visitors but many more first-timers in Summer likely due to more International visitors in Summer.

**Table 13 – First-Time or Past Visitor
(in past three years)**

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
None/first trip	37.7%	31.6%	24.0%	57.8%	42.0%	17.5%	33.5%	82.0%	27.9%	12.9%
1 time	18.0%	15.6%	33.9%	6.2%	10.7%	18.8%	22.8%	11.2%	14.5%	8.8%
2 times	8.9%	6.5%	8.3%	6.3%	13.2%	9.6%	12.7%	3.3%	9.3%	7.9%
3-5 times	17.5%	16.3%	15.8%	19.6%	18.4%	24.3%	18.5%	2.9%	25.9%	33.0%
6-10 times	8.8%	11.8%	9.5%	3.7%	9.9%	16.1%	3.7%	0.4%	10.1%	20.9%
11-30 times	6.6%	13.4%	5.9%	4.2%	5.0%	10.0%	6.5%	0.2%	8.0%	10.6%
31-100 times	2.4%	4.8%	2.6%	2.2%	0.9%	3.7%	2.4%	0.0%	4.2%	5.9%
Median (all visitors)	1.18	1.93	1.27	0.37	1.25	2.86	1.22	0.11	2.31	4.38
Median (repeat visitors)	3.05	4.61	2.00	3.54	3.13	3.74	2.33	1.30	3.63	4.97

VISITORS IN MONO COUNTY FOR OUTDOOR RECREATION & VACATION/LEISURE

- Purpose varies by season and residence, with outdoor recreation higher in Winter and among Californians.
- Vacation purpose higher in summer and fall
- International visitors mainly on a leisure trip and to visit Yosemite

Table 14 - Main Overall Purpose

(>2%)

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
Outdoor recreation	25.4%	41.2%	22.4%	23.4%	20.4%	40.1%	19.0%	4.0%	51.6%	66.0%
Vacation/pleasure/general visit	21.9%	8.7%	21.1%	27.0%	27.4%	17.9%	16.1%	36.4%	23.7%	21.9%
Just passing through to another place	14.2%	21.5%	14.8%	16.6%	7.3%	12.4%	19.1%	12.3%	4.3%	2.0%
Sightseeing or exploring the area	14.0%	15.8%	15.6%	6.2%	16.8%	10.9%	14.8%	18.9%	6.1%	1.7%
Visiting Yosemite	8.2%	0.2%	5.4%	10.5%	14.7%	2.6%	9.6%	17.7%	3.8%	1.4%
Visit historic sites or museum	3.9%	0.0%	7.3%	3.0%	3.0%	4.6%	2.7%	3.8%	1.0%	1.5%
Visit natural wonders/attractions	3.7%	1.9%	4.9%	3.5%	3.7%	2.5%	4.6%	5.2%	2.3%	0.3%
Visit relatives/friends/social or personal	2.7%	2.5%	3.6%	3.5%	1.4%	2.0%	5.9%	0.5%	4.0%	2.2%

HALF HERE FOR VACATION, ESP. IN SUMMER & FALL

- When looking at all purposes, vacation/leisure tops the list for all segments, whereas outdoor recreation is third after sightseeing/exploring but outdoor recreation first in Winter.
- Note hikers tend to do a wide range of other activities whereas fishers tend to concentrate on fishing.

Table 15 – All Purposes (Main + Other) Visiting Mono County This Trip (>9%)

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
Vacation/pleasure/general visit	54.1%	31.5%	46.3%	67.1%	67.3%	50.1%	46.9%	70.3%	72.2%	66.5%
Sightseeing or exploring the area	44.6%	33.4%	45.8%	44.4%	50.3%	42.0%	44.3%	49.8%	49.7%	39.6%
Outdoor recreation	41.4%	49.3%	34.0%	56.2%	33.7%	59.2%	32.7%	16.6%	100.0%	100.0%
Visiting Yosemite	27.9%	4.2%	22.8%	39.6%	39.5%	9.3%	24.4%	68.1%	22.7%	8.5%
Visit natural wonders/attractions	26.2%	13.9%	20.5%	37.5%	31.6%	18.8%	21.0%	46.3%	30.8%	19.8%
Visit historic sites or museum	20.5%	9.9%	23.1%	24.2%	21.3%	14.5%	14.1%	39.4%	14.2%	12.8%
Just passing through to another place	20.4%	24.6%	20.6%	25.2%	13.9%	15.6%	27.1%	22.1%	12.0%	2.3%
Visit relatives/friends/social or personal	9.6%	8.0%	5.9%	18.9%	7.8%	9.7%	16.6%	1.5%	18.6%	13.5%

FISHING, HIKING MAIN OUTDOOR ACTIVITIES

- For those doing outdoor activities, about one-quarter each were fishing or hiking.
- Not surprisingly, skiing was highest in Winter, with fishing highest in Spring when the season opens and hiking in the summer due to good weather and open trails.
- 56% of International recreation visitors hiked in Mono County, more by far than any segment.

Table 16 – Main Outdoor Recreation Activity

	Total Visitor	Season				Annual Total				
		Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base: Outdoor activities	553	155	123	139	136	363	132	58	298	199
Fishing	27.8%	2.5%	40.3%	34.1%	28.8%	34.3%	19.7%	1.1%	23.2%	68.9%
Hiking	25.7%	4.1%	18.3%	44.1%	30.7%	22.7%	21.7%	55.6%	44.9%	11.3%
Alpine Skiing - downhill	11.9%	48.5%	6.2%	0.0%	0.0%	13.2%	8.9%	9.7%	6.1%	1.3%
Camping	6.3%	0.0%	2.3%	5.9%	17.0%	5.7%	7.7%	7.2%	9.2%	6.3%
Snowboarding	3.2%	13.7%	1.2%	0.0%	0.0%	3.5%	3.4%	1.1%	0.5%	0.0%
Off-road motor sports	3.1%	0.0%	6.4%	0.4%	5.6%	2.7%	5.6%	0.0%	0.5%	2.5%
Photography	2.8%	1.3%	4.1%	0.4%	5.8%	2.6%	2.2%	5.4%	2.4%	0.7%
Rock-climbing	2.5%	0.0%	6.1%	1.7%	1.7%	0.6%	9.1%	1.1%	4.0%	0.6%
Nordic Skiing - cross-country/skating	2.5%	10.3%	0.6%	0.4%	0.0%	1.2%	7.5%	0.0%	1.0%	0.0%
Boating	1.8%	0.0%	4.8%	1.8%	0.2%	1.9%	1.2%	2.7%	1.5%	2.3%
Skiing/ Snowboarding - backcountry	1.8%	7.5%	0.6%	0.0%	0.0%	2.4%	0.0%	1.1%	0.8%	0.0%
None of these	3.8%	4.8%	1.4%	3.7%	5.8%	3.4%	3.1%	7.8%	0.0%	0.0%

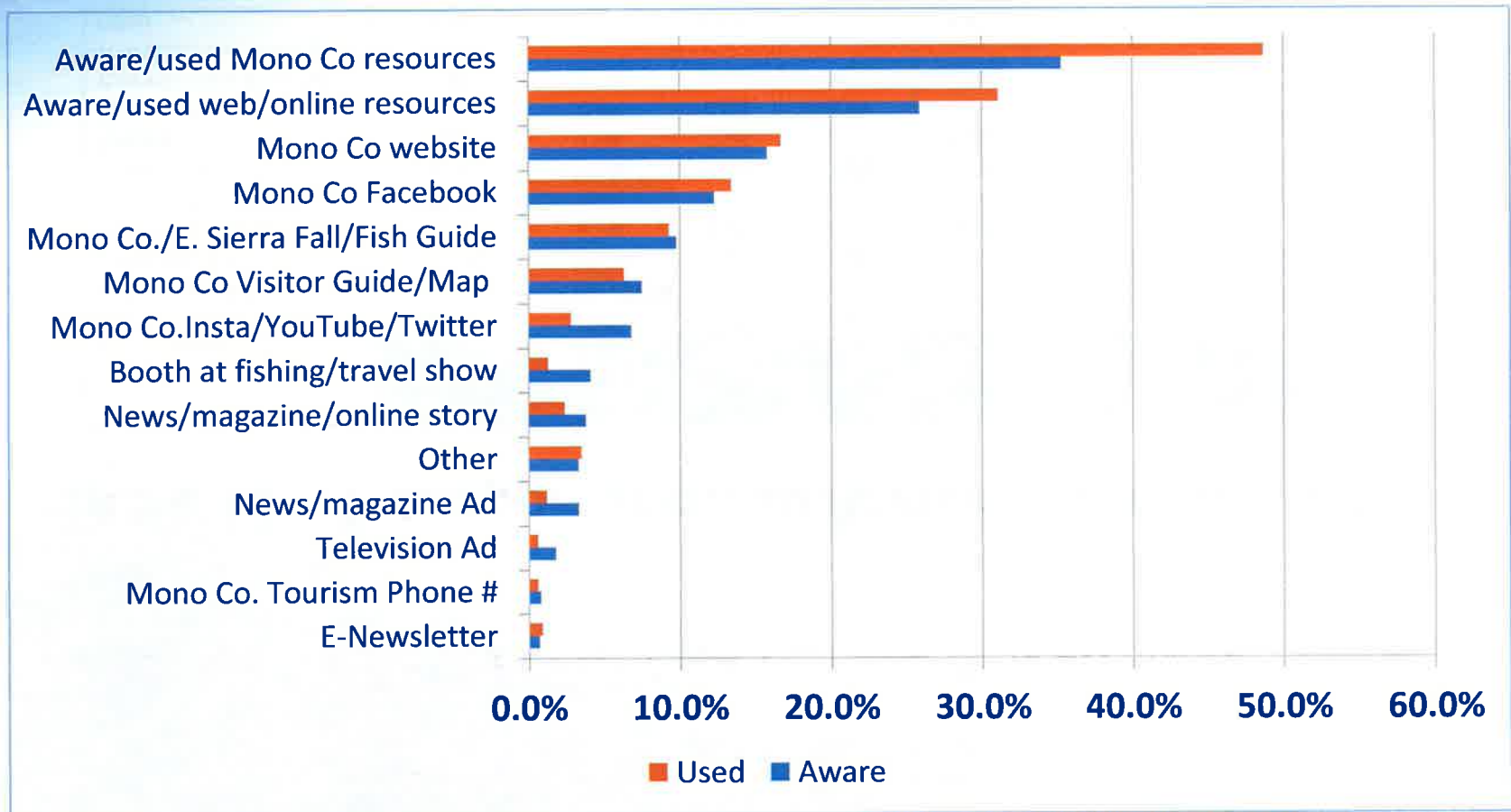
VISITORS GO TO A RANGE OF MONO CO. PLACES; VARIES BY SEASON & RESIDENCE

**Table 17 – Mono County Attractions/Landmarks Places
(Main + Others >5%)**

	Total Visitor	Season				Annual Total		
		Winter	Spring	Summer	Fall	Residence		
						CA	Other U.S.	Int'l
Base:	1032	224	268	213	327	524	273	235
Mono Lake	43.2%	30.8%	54.6%	40.3%	40.1%	34.8%	44.2%	58.3%
Mammoth Lakes Town	36.4%	44.7%	22.4%	39.8%	44.6%	42.1%	27.9%	35.1%
June Lakes area	27.9%	26.4%	22.5%	22.2%	39.1%	37.5%	21.8%	16.0%
Bodie	20.9%	2.7%	30.1%	27.4%	16.9%	12.7%	16.0%	42.4%
Mammoth - Lakes Basin/x-c ski area	16.0%	9.9%	9.3%	25.3%	20.4%	19.1%	15.2%	10.9%
Convict Lake	15.7%	11.6%	19.3%	11.9%	17.0%	20.5%	12.5%	10.0%
Lee Vining	14.7%	16.3%	9.2%	21.2%	15.0%	14.9%	15.1%	13.9%
Bridgeport	13.6%	10.1%	9.6%	6.7%	25.7%	14.0%	15.2%	11.1%
Twin Lakes-Bridgeport	10.5%	6.6%	3.4%	6.8%	23.9%	12.6%	12.4%	4.3%
Mammoth Mtn. (bike park, scenic gondola, ski)	10.4%	30.2%	7.5%	6.2%	4.3%	13.3%	8.7%	6.5%
Rock Creek/Tom's Place	9.6%	9.5%	8.6%	11.3%	9.3%	13.1%	7.4%	5.1%
Just passing through	9.0%	16.4%	5.5%	15.6%	3.4%	4.4%	13.7%	12.8%
Coleville/Walker/Topaz	8.7%	9.6%	13.4%	4.2%	6.2%	3.9%	10.6%	15.8%
Lundy Lake	7.9%	0.3%	4.8%	3.1%	19.8%	10.9%	7.6%	2.2%
Crowley Lake/McGee Creek	7.6%	5.7%	5.9%	9.8%	8.9%	8.9%	7.2%	5.5%
Virginia Lakes	6.5%	0.9%	3.6%	3.8%	15.4%	9.4%	6.0%	1.4%
DK/No response	1.2%	1.7%	2.1%	0.0%	0.6%	2.4%	0.0%	0.0%

A THIRD AWARE OF AND HALF USE MONO COUNTY INFO RESOURCES

Exhibit 3 – Awareness and Use of Mono Co. Tourism Information Resources



9 IN 10 DROVE TO MONO COUNTY; CONSISTENT BY SEASON & ORIGIN

Table 18 – Transportation to Arrive in Mono County

	Total Visitor	Winter	Spring	Summer	Fall	Residence		
						CA	Other U.S.	Int'l
Base:	1032	224	268	213	327	524	273	235
Personal vehicle	61.4%	78.9%	54.9%	56.2%	61.7%	84.2%	68.0%	9.4%
Rental vehicle	26.5%	10.8%	29.6%	33.3%	27.7%	4.1%	18.3%	79.7%
RV/recreational vehicle	5.5%	6.7%	4.0%	8.7%	3.9%	4.0%	7.6%	5.9%
Tour coach or bus	2.5%	0.0%	5.7%	0.0%	2.4%	4.7%	0.0%	1.2%
Motorcycle	2.2%	0.1%	3.2%	0.2%	3.7%	1.9%	3.9%	0.6%
Commercial airline	1.4%	2.5%	2.6%	0.3%	0.1%	0.7%	2.1%	1.9%
Public transit	0.2%	0.0%	0.0%	0.3%	0.5%	0.0%	0.3%	0.5%
Yosemite Area Regional Transportation (YARTS)	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Other	0.4%	0.9%	0.0%	1.0%	0.0%	0.5%	0.0%	0.6%

9 IN 10 DROVE TO GET AROUND MONO COUNTY; INT'L. USE YARTS

Table 19 – Transportation to Get Around Mono County

	Total Visitor	Winter	Spring	Summer	Fall	Residence		
						CA	Other U.S.	Int'l
Base:	1032	224	268	213	327	524	273	235
Personal car/truck/van/SUV	61.5%	75.5%	55.6%	57.1%	62.9%	85.6%	65.6%	10.0%
Rental car/truck/van/SUV	27.3%	11.2%	31.0%	34.3%	28.1%	4.3%	19.9%	80.8%
Free Mammoth Lakes Trolley/ESTA Bus	6.0%	16.0%	1.6%	8.1%	3.1%	8.4%	5.0%	2.4%
RV/Recreational vehicle	5.9%	8.5%	3.4%	8.0%	5.4%	2.6%	8.7%	9.1%
Walking	3.6%	4.4%	0.8%	7.4%	3.5%	4.5%	3.3%	2.4%
Motorcycle	2.7%	0.1%	3.6%	0.6%	4.8%	2.9%	4.1%	0.6%
Organized Tour van or bus	2.5%	0.0%	5.7%	0.0%	2.4%	4.7%	0.0%	1.2%
Yosemite Area Regional Transportation (YARTS)	1.5%	0.0%	3.6%	0.0%	1.2%	0.0%	0.0%	6.1%
Bicycle	1.0%	1.1%	0.9%	2.1%	0.2%	1.1%	1.5%	0.2%
Off-road Vehicle	0.6%	0.0%	1.0%	0.1%	1.1%	0.6%	1.3%	0.0%
Paid Public transit e.g., Taxi or ESTA (Lancaster - Reno)	0.5%	0.4%	0.1%	1.5%	0.2%	0.5%	0.3%	0.6%
Other	0.8%	1.1%	0.0%	1.9%	0.6%	1.0%	0.8%	0.4%

6 IN 10 VISITORS STAYED OVERNIGHT IN MONO CO.

- 92% of Mono County visitors stayed overnight anywhere on this trip and were away 5.2 nights.
- 62% stayed overnight in Mono County (thus 38% were day visitors).
- On average all Mono County visitors stayed here 1.2 nights.
- Overnight Mono County visitors stayed here 2.4 nights, about half of their overall trip.

Table 20 – Nights Away From Home This Trip

% staying overnight in...	Total Visitor	Winter	Spring	Summer	Fall	Residence		
						CA	Other U.S.	Int'l
Base: all visitors	1032	224	268	213	327	524	273	235
Total	92.3%	89.6%	88.0%	100.0%	93.0%	90.8%	90.5%	97.3%
Mono County	62.0%	54.5%	51.7%	71.0%	71.5%	69.4%	48.6%	63.0%
Other locations/destinations	59.7%	49.8%	59.2%	70.6%	58.0%	34.8%	69.7%	96.8%
Not staying overnight	7.7%	10.4%	12.0%	0.0%	7.0%	9.2%	9.5%	2.7%
Base: all visitors	1032	224	268	213	327	524	273	235
Total median nights	5.21	3.40	5.15	8.19	4.94	3.54	5.94	20.12
Nights all other locations/destinations	2.60	0.50	3.51	5.09	1.73	0.27	4.31	18.61
Nights in Mono County	1.22	1.20	0.64	1.64	1.34	2.14	0.47	0.87
Base: Overnight visitors	920	194	228	198	300	479	226	215
Total median nights	5.18	3.47	4.71	7.87	5.04	3.74	5.26	20.12
Nights in Mono County	2.37	2.87	2.27	2.78	2.05	3.17	2.27	1.40
Nights in all other locations/destinations	0.45	0.19	0.40	2.96	0.73	0.12	1.60	18.61

4 IN 10 OVERNIGHT VISITORS USED HOTELS

- Of the 62% who were overnight visitors, 43% stayed in hotel/motel lodging, 26% used Other paid lodging, 20% camped while 12% used private unpaid lodging.
 - 76% of International visitors used hotel lodging.
- Of Winter visitors, 45% used Other paid lodging versus 15% in hotels, while 61% in Fall used hotels.

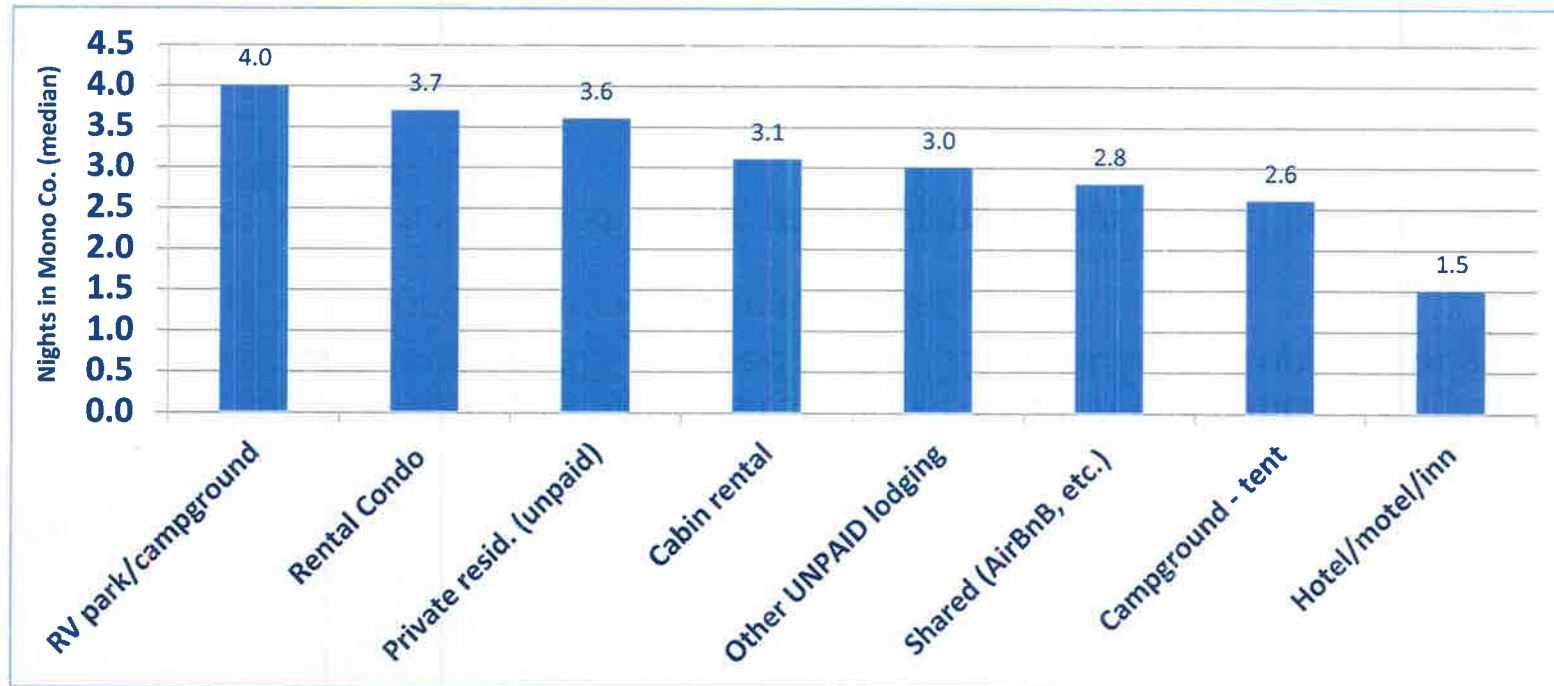
Table 21 - Mono County Lodging Type

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base: all visitors	1032	224	268	213	327	524	273	235	298	199
Hotel or motel or inn	26.8%	14.5%	20.8%	23.7%	43.6%	19.4%	20.8%	48.2%	18.3%	18.2%
Other paid overnight lodging	15.9%	24.4%	14.0%	21.0%	8.9%	23.3%	10.1%	8.0%	29.3%	35.2%
Camping	12.1%	4.3%	12.6%	17.6%	12.3%	15.6%	11.9%	5.4%	24.2%	30.5%
Private Home or other unpaid	7.2%	11.4%	4.4%	8.7%	6.7%	11.1%	5.7%	1.4%	10.8%	9.7%
Not overnight	38.0%	45.5%	48.3%	29.0%	28.5%	30.6%	51.4%	37.0%	17.4%	6.4%
Base: Mono Co. overnight visitor	920	194	228	198	300	479	226	215	284	194
Hotel or motel or inn	43.2%	26.6%	40.2%	33.4%	61.0%	27.9%	42.8%	76.5%	22.1%	19.5%
Other paid overnight lodging	25.6%	44.7%	27.0%	29.6%	12.4%	33.6%	20.9%	12.7%	35.5%	37.6%
Camping	19.5%	7.9%	24.4%	24.8%	17.2%	22.6%	24.6%	8.6%	29.3%	32.5%
Private Home or other unpaid	11.6%	20.8%	8.4%	12.2%	9.4%	15.9%	11.8%	2.2%	13.1%	10.4%

2.4 MEDIAN NIGHTS – MORE IN OTHER PAID LODGING

- Visitors spent the most nights 4.0 in campgrounds and 3.7 in Condos, but only 1.5 nights in hotels.

Exhibit 4 – Nights in Mono County Lodging by Type



9 IN 10 VISITORS SPENT MONEY IN MONO COUNTY

- Overall 94% of visitors spent money in Mono County the day interviewed.
- By category, 75% spent for meals out and 47% for beverages/drinks, while 34% spent for groceries/supplies and 32% for paid lodging.

Table 22 – Spending Incidence (in Mono County)

	Total Visitor	Residence			Activities		MC Lodging			
		CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/ Inn	Other paid	Private/ Unpaid	Camping
Base:	1032	524	273	235	298	199	410	195	146	169
Meals out/snacks/dining	74.6%	69.8%	75.8%	82.5%	69.1%	70.5%	93.8%	80.4%	73.1%	53.0%
Drinks/beverages	47.3%	52.3%	40.0%	46.0%	51.6%	57.5%	60.2%	63.9%	67.6%	41.3%
Groceries/supplies/incidentals	34.2%	34.4%	32.6%	35.6%	36.4%	39.4%	38.4%	51.0%	36.4%	34.2%
PAID lodging	31.6%	27.7%	25.3%	46.3%	30.0%	38.8%	79.4%	42.8%	0.6%	26.5%
Local transport. (gas, parking, etc.)	25.5%	21.0%	29.5%	29.8%	25.6%	16.4%	34.2%	19.8%	23.1%	17.5%
Shopping/Gifts/Souvenirs	23.4%	19.4%	28.4%	25.7%	26.3%	14.8%	18.2%	36.4%	15.7%	17.3%
Admissions/fees for recreation venues or attractions (ski/trail passes, guides, etc.)	22.4%	17.3%	14.5%	41.4%	17.4%	10.8%	42.7%	22.3%	17.6%	20.9%
Recreation gear/equipment rental or purchase	7.0%	12.1%	2.8%	1.9%	16.1%	22.8%	5.0%	26.9%	8.0%	4.4%
Not money in Mono County today	5.5%	7.7%	1.9%	5.3%	7.0%	8.2%	1.2%	1.0%	4.6%	17.1%

\$145 OVERALL MEDIAN DAILY SPENDING - HIGHEST FOR HOTEL GUESTS

- The highest daily median \$229 was spent by Hotel guests and \$212 by Other paid lodgers.
- Winter spending was highest \$236 about double other seasons.
- Californians spent \$149 median versus \$141 by Other U.S and \$135 by International visitors.

Table 23 – Visitor Per-Capita Daily Spending in Mono County

Mean per Capita Spending	Total Visitor	Season				Annual Total						
		Winter	Spring	Summer	Fall	Residence			Activities		MC Lodging	
						CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/Inn	Other paid
Base:	1032	224	268	213	327	524	273	235	298	199	410	195
Total (\$)	144.89	236.12	113.78	122.59	143.40	148.82	141.45	135.21	136.30	142.67	229.15	212.01
PAID lodging	54.13	66.22	42.16	52.40	60.47	51.90	56.71	58.61	52.72	61.56	119.98	86.28
Meals out/snacks/dining	31.69	36.79	27.73	28.91	35.32	32.86	29.49	30.71	28.06	35.02	49.92	36.79
Admissions/fees recreation venues or attractions (ski/trail passes, guides, etc.)	17.66	77.01	9.88	2.30	5.23	20.61	13.85	12.37	13.25	2.67	13.91	31.05
Groceries/supplies	11.85	13.39	8.85	11.56	14.20	12.39	13.98	6.32	14.46	11.98	10.57	15.86
Drinks/beverages	11.70	14.51	8.37	13.52	11.49	13.97	8.49	8.06	11.57	16.21	14.37	18.92
Shopping/Gifts/Souvenirs	8.00	16.06	7.42	5.18	6.56	7.65	9.49	6.93	6.97	6.12	9.62	12.08
Local Transport.	6.34	4.05	5.76	6.09	8.51	4.94	6.99	10.71	4.57	4.41	8.55	4.35
Recreation gear/equipment r	3.53	8.09	3.63	2.62	1.61	4.50	2.45	1.51	4.69	4.70	2.22	6.68

HIGH SATISFACTION WITH MONO COUNTY

- Visitors were very highly satisfied with Mono County, with 95% being extremely or very satisfied, while less than 1% were dissatisfied.
- Visitors rated their experience at 4.6 (out of 5), very satisfied.
- Hikers and fishers each rated Mono County the highest, over 4.80.

Table 24 – Satisfaction with Mono County

	Total Visitor	Season				Annual Total				
		Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base: Excl. 'DK/Not sure'	1013	219	267	200	327	517	267	229	292	196
5. Extremely satisfied	64.9%	61.5%	66.2%	67.3%	63.8%	74.1%	66.8%	43.8%	85.9%	88.8%
4. Very satisfied	30.3%	30.0%	31.3%	22.4%	34.5%	24.1%	26.7%	47.2%	12.1%	9.4%
Extremely + Very satisfied:	95.2%	91.5%	97.5%	89.7%	98.2%	98.1%	93.5%	91.0%	98.0%	98.2%
3. Somewhat satisfied	4.5%	7.8%	2.3%	9.5%	1.8%	1.4%	6.1%	9.0%	1.3%	1.2%
2. Somewhat dissatisfied	0.1%	0.0%	0.0%	0.7%	0.0%	0.1%	0.3%	0.0%	0.2%	0.3%
1. Very dissatisfied	0.2%	0.7%	0.1%	0.0%	0.0%	0.3%	0.0%	0.0%	0.6%	0.3%
Mean rating (5=Extr. Sat. & 1=Extr. Dissat.):	4.60	4.52	4.63	4.56	4.62	4.71	4.60	4.35	4.83	4.86

MOST SATISFACTION WITH SCENIC BEAUTY & ACTIVITIES BY ALL SEGMENTS

Table 25 – Reasons Why Satisfied (>10%)

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base: Satisfied with Mono County	1007	217	266	197	327	513	265	229	289	194
Scenic beauty/beautiful area	85.4%	79.5%	92.9%	76.7%	86.1%	89.2%	83.1%	80.3%	92.2%	84.9%
Has the activities I/we want to do	55.1%	47.3%	49.9%	68.1%	57.0%	57.2%	49.5%	57.2%	69.6%	74.0%
Many things to see and do	26.2%	21.1%	14.0%	43.1%	31.7%	23.9%	30.0%	26.5%	44.3%	29.6%
Great weather	25.4%	24.5%	25.4%	33.3%	20.9%	31.1%	24.0%	15.5%	47.8%	30.9%
Good for families/family-friendly	19.0%	23.7%	15.4%	30.4%	12.9%	28.2%	14.8%	5.2%	36.5%	40.0%
Relaxing area & activities/	19.0%	17.5%	18.2%	25.4%	16.5%	23.7%	16.3%	12.5%	38.5%	37.5%
Like/love the area/been here many times	18.7%	22.6%	9.7%	27.3%	21.2%	28.4%	16.2%	2.0%	39.2%	36.3%
Friendly people	18.2%	31.6%	16.3%	21.5%	10.6%	19.1%	20.8%	13.6%	27.0%	22.4%
good getaway area	16.1%	13.6%	15.8%	26.2%	11.4%	20.6%	16.1%	7.0%	32.8%	34.1%
Clean air/good environment	14.2%	19.9%	15.2%	11.2%	11.6%	19.0%	11.5%	7.3%	23.8%	29.2%
Dog friendly	11.0%	8.7%	8.7%	15.5%	11.8%	18.3%	7.3%	0.2%	17.8%	24.4%

Characteristics/Demographics

- Travel Group**
- Household**

7 IN 10 WERE FAMILY OR COUPLES TRAVELERS

- Overall 39% of visitors were traveling as a family with 27% in couples and 16% friends groups.
 - This varied by season with 49% being families in Summer, as were 40% of hikers
- 34% of Winter visitors were couples the highest of any season.
- As well, 22% of fishers were friends groups the highest of any segment.

Table 26 – Immediate Travel Group

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
A family group	38.7%	39.3%	32.5%	48.8%	37.6%	37.7%	30.8%	49.5%	40.0%	37.2%
A couple	27.2%	34.4%	26.8%	17.6%	30.3%	25.8%	29.7%	26.9%	22.4%	17.7%
A group of friends or co-workers	15.9%	15.5%	19.2%	18.5%	10.5%	15.9%	21.2%	10.0%	19.8%	21.7%
A mixed group of family and friends	12.3%	2.8%	15.5%	11.9%	14.8%	13.9%	10.0%	11.8%	11.5%	18.1%
Alone	5.3%	8.0%	4.3%	3.0%	6.6%	5.4%	8.4%	1.6%	6.2%	4.9%
Other	0.7%	0.1%	1.7%	0.2%	0.2%	1.3%	0.0%	0.3%	0.2%	0.3%

RESPONDENT MEDIAN AGE OF 46

- Most respondents were in their mid 40's with Other U.S residents at 50, and Fall visitors and fishers at nearly 50 years of age.

Table 27 – Respondent Age

	Total Visitor	Season				Annual Total				
		Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
18-29	16.5%	17.5%	15.3%	19.1%	15.4%	15.3%	18.4%	16.8%	19.8%	8.9%
30-39	18.7%	16.6%	20.3%	21.6%	15.9%	20.0%	14.3%	21.2%	19.2%	15.1%
40-49	23.9%	27.6%	21.6%	30.4%	19.3%	26.7%	15.6%	28.1%	23.8%	28.5%
50-59	21.6%	23.5%	17.0%	18.3%	28.0%	22.0%	19.3%	23.3%	22.1%	23.9%
60+	19.3%	14.8%	25.8%	10.3%	21.3%	16.0%	32.6%	10.4%	15.1%	23.5%
DK/Refused	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Median age	45.7	45.3	46.2	42.5	49.2	45.0	50.4	43.7	44.1	48.6

HALF OF VISITORS ARE MARRIED – TWO-THIRDS HAVE NO CHILDREN AT HOME

Table 28 – Household Composition & Children at Home

	Total Visitor	Season				Annual Total				
		Winter	Spring	Summer	Fall	Residence			Activities	
						CA	Other U.S.	Int'l	Hike	Fish
Base:	1032	224	268	213	327	524	273	235	298	199
Married/committed relationship	55.6%	72.5%	50.9%	54.0%	51.5%	59.5%	56.6%	46.9%	61.2%	66.6%
Single/unmarried	21.2%	18.4%	29.0%	18.0%	16.5%	22.8%	26.6%	11.9%	25.5%	15.8%
Extended family group	14.3%	1.6%	10.7%	21.4%	20.9%	7.6%	10.4%	31.8%	7.0%	10.5%
Group of unrelated individuals	7.9%	6.3%	8.1%	6.3%	9.8%	8.4%	5.7%	9.4%	6.3%	5.7%
Other	1.0%	1.2%	1.3%	0.3%	1.2%	1.8%	0.7%	0.0%	0.0%	1.5%
Age 0-5	7.4%	8.3%	3.4%	13.5%	6.9%	8.7%	4.9%	7.9%	8.6%	12.9%
Age 6-12	18.1%	26.4%	14.2%	23.2%	13.7%	22.2%	11.0%	18.4%	15.7%	16.2%
Age 13-18	11.9%	12.1%	9.2%	18.2%	10.0%	12.2%	6.6%	17.2%	12.3%	15.5%
Age over 18	12.0%	7.9%	18.6%	9.5%	8.9%	13.2%	7.9%	14.2%	14.1%	19.6%
No children living with me	63.8%	60.4%	63.9%	55.8%	71.9%	57.1%	79.6%	58.9%	61.8%	51.7%

\$90,000 ANNUAL MEDIAN HOUSEHOLD INCOME FOR 2018

Table 29 – 2018 Annual Household Income

	Total Visitor	Residence			Activities		MC Lodging			
		CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/ Inn	Other paid	Private/ Unpaid	Camp-ing
Valid Base: reported	792	425	216	151	257	164	284	152	124	143
Under \$30,000	8.9%	8.2%	13.1%	4.3%	11.5%	3.1%	3.6%	1.4%	10.3%	9.8%
\$30,000 - \$49,999	7.6%	7.7%	7.8%	7.1%	8.1%	7.9%	8.6%	4.1%	11.4%	12.0%
\$50,000 - \$74,999	18.2%	19.2%	17.8%	16.1%	16.6%	20.2%	15.4%	14.7%	18.7%	20.8%
\$75,000 - \$99,999	25.6%	18.9%	25.8%	44.1%	18.1%	18.3%	32.9%	18.4%	17.6%	15.7%
\$100,000 - \$199,999	30.0%	30.7%	30.7%	26.9%	30.7%	37.4%	35.4%	40.1%	23.4%	33.7%
\$200,000 - \$500,000	9.0%	14.1%	4.6%	1.5%	14.1%	12.1%	3.9%	20.0%	14.3%	7.1%
Over \$500,000	0.7%	1.2%	0.2%	0.0%	0.9%	1.1%	0.1%	1.2%	4.4%	0.9%
Median:	\$89,921	\$94,736	\$85,953	\$87,749	\$94,028	\$101,604	\$91,994	\$128,319	\$88,802	\$86,796

MALES 61% OF RESPONDENTS

- Respondents in total and by segment were skewed male.

**Table 30 – Gender
(respondent)**

	Total Visitor	Residence			Purposes (all)	Activities		MC Lodging			
		CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Private/Unpaid	Camp-ing
Base:	1032	524	273	235	553	298	199	410	195	146	169
Male	61.3%	62.5%	59.0%	61.8%	64.4%	64.0%	65.1%	63.8%	59.6%	60.8%	60.1%
Female	38.4%	37.3%	40.9%	37.9%	35.3%	35.4%	34.1%	35.8%	39.5%	39.2%	39.9%
Other	0.2%	0.3%	0.1%	0.4%	0.3%	0.6%	0.8%	0.4%	0.8%	0.0%	0.0%

Varied Interview Locations to Capture a Representative Sample

- The 1,032 on-site intercepts were conducted at highly frequented visitor locations, and distributed as shown below:

Table 30 – Interviewing Locations

	Total Visitor	Season			
		Winter	Spring	Summer	Fall
Base:	1032	224	268	213	327
Mammoth Lakes - Welcome Center (all)	18.2%	34.4%	6.4%	11.2%	26.7%
Mono Lake Committee Visitor Info Center (all)	16.9%	0.6%	41.4%	6.4%	7.3%
Bodie - Museum/visitor center (not wint)	14.3%	0.1%	16.6%	21.9%	14.9%
Walker - Walker Burger & Rest Area/Park (next to Community Center and Senior Center)/walker Country Store Gas (all)	12.3%	13.3%	16.4%	8.9%	9.6%
Bridgeport - Jolly Kone (su)/Shell Gas/Ranger Station (all)	9.0%	11.3%	0.1%	6.4%	19.5%
June Lake - Ohana's Food Truck & Brewery (all) & June Lake Beach (not wint)	7.4%	18.7%	2.9%	7.9%	5.1%
Crowley Lake - General Store & Cafe (not wint)	5.0%	0.0%	6.7%	9.9%	2.5%
Lee Vining - MobilMart & Mono Basin Area Visitor Center (not wint)	4.9%	0.0%	0.0%	11.4%	8.5%
Mammoth Lakes - Village at Mammoth (all)	3.4%	6.8%	3.3%	4.2%	0.7%
Mammoth Lakes Basin - Tamarack Lodge (all)	3.3%	0.6%	4.2%	7.3%	0.7%
Tom's Place (all)	2.9%	5.1%	0.5%	2.6%	4.5%
Mammoth Mtn. -- Main Lodge (all)	1.6%	6.9%	1.0%	0.2%	0.0%
Mammoth Lakes Airport - waiting bldg. (all)	0.6%	2.2%	0.5%	0.0%	0.0%
Devil's Postpile - Info Center & Bus Stop (not wint)	0.3%	0.0%	0.0%	1.6%	0.0%

THANK YOU VERY MUCH!

QUESTIONS...

