

*Lauren Schlau
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Profile of Mono Visitors & Economic Impacts of Tourism



July 2019

*Lauren Schlan
Consulting*

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Alicia Vennos
Economic Development Department
Mono County

Dear Ms.Vennos :

Herein is presented the full report on the economic impacts of tourism and overall profile of Mono County visitors for calendar year 2018. This report includes our approach, detailed narrative findings and data tables with segments and comparisons as data are available to (fiscal year) 2008 when the study was last conducted.

Please contact us should you have any questions or comments regarding this report and the results.

Thank you very much for the opportunity to have conducted this study on your behalf of Mono County.

Sincerely,

Lauren Schlan

President

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SECTION I

- Study Overview**
- Summary of Key Points**

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 to help guide MCED tourism 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 (fiscal year) 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 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 - IMPACTS

Mono County tourism for 2018 reflects a very positive picture. Almost all key indicators showed strong growth from 2008 when the study was last conducted, benefitting the county economy, residents and businesses which depend on year-round non-local visitation.

- Mono County visitor volume grew by 14% to 1.7 million in 2018 from 1.5 million in 2008.
- However due to shorter stays, off by .7 of a day, total visitor days dipped by 23% to 4.2 million in 2018 from 4.7 million ten years ago.
- Significantly, visitor spending grew by 63% over the ten years to \$601 million up from \$370 million in 2008, spurred by an 84% rise in per-capita spending of \$145 this year from \$79 in 2008 (and helped offset the drop in visitor days).
- And with lodging supply growth and higher room/unit charges, countywide transient occupancy tax rose by 43% to \$21.5 million from \$15.1 million in 2008.
- Visitor spending also added another \$2.2 million of sales tax up from \$1.5 million.
- Finally, visitor activity and spending supported 5,300 local jobs, up 18% from 4,500 in 2008.

EXECUTIVE SUMMARY - PROFILE

The key for best understanding Mono County tourism is by seasons when distinct differences in residence origin, activities and demographics are evident. Overall and year-round Mono County tourism is driven by scenic beauty and activities. Californians, specifically Southern Californians and especially in Winter visit for skiing. This varies in the Summer when the area has an influx of International visitors many headed to Yosemite National Park and also who hike in Mono County. Spring attracts anglers and in fall couples come to see colors and engage in outdoor activities in the notably good weather. Further details are summarized on the next few slides.

Residence/Origin

- Californians comprised 48% of total visitation with 28% from Other U.S. states and 24% International.
- As the leading origin state at 63% (of U.S. visitors), Californians play a dominant role in Mono County visitor dynamics.
 - Over half of Mono County California visitors were from Southern California year round, but seasonally in winter, visitors were from Los Angeles and Orange County with some from East Bay; spring and summer had an uptick from Central California.
 - Half of International visitors were from Europe, and 35% of summer visitors were International, their highest season.

EXECUTIVE SUMMARY - PROFILE

First-Time or Repeat Visitation

- Given the high share of Californians, it is not surprising that 62% of visitors have visited Mono County in the past three years and they have made about 3 trips in that period.
 - Again this varies seasonally; with more International visitors in summer, 58% were first-time visitors (in three years)
- Nearly three-quarters are highly likely to return to Mono County, and will do so mainly for the areas' scenic beauty and its activities

Purposes and Reasons for Choosing Mono County

- Main purposes for visiting Mono County were outdoor recreation and vacation/leisure (but this varies by season, by visitor origin and by location visiting in Mono County).
- Close to half of visitors came to Mono County rather than elsewhere for this trip was for the area's scenic beauty, as well as for activities.

EXECUTIVE SUMMARY - PROFILE

Activities and Sites

- Main outdoor activities were fishing and hiking, again varying by season; skiing was highest in winter, fishing in spring, hiking in summer and fall.
- The most visited Mono County places/sites were Mono Lake and Mammoth Lakes (town), again varying by season.

Travel Resources

- Overall 82% (86%) of Mono Lakes visitors used resources for planning this trip
- 35% of visitors indicated awareness of any Mono County tourism resources; 16% were aware of the MonoCounty.org website, 12% of Mono County Facebook and 10% of the Eastern Sierra Color & Fishing Guide.
- Nearly half of visitors aware of Mono County specific information resources used any to plan this trip: 17% used Mono County.org, 13% used Mono County Facebook and 9% of the Eastern Sierra Color and Fishing Guide.

Transportation

- 94% of visitors drove to arrive in Mono County, and 95% drove to get around the area.

EXECUTIVE SUMMARY - PROFILE

Overnight Stays and Lodging

- 62% stayed overnight in Mono County thus 38% were day visitors. All Mono County visitors stayed here an average of 1.2 nights, while *overnight* Mono County visitors stayed 2.4 nights.
- Of overnight visitors, 43% stayed in hotels/motels, 26% in other paid lodging (mainly condos), 20% camped and 12% used unpaid lodging.

Satisfaction

- Visitors were highly satisfied with Mono County, with 95% (87%) being extremely or very satisfied. They mainly liked the area's *scenic beauty* and having *the activities they want*.

Travel Group and Demographics

- 39% of visitors were traveling as a family, with 27% couples and 16% friend groups. In summer 49% were families.
- Visitors (respondents) averaged 46 years of age.
- Half of visitors are married; 36% of all visitors have children at home.
- Median 2018 household income was \$90,000.

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.

REPORT CONTENTS

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SECTION 2

- Visitor Volume**
- Economic & Fiscal Impacts**
- Employment Supported**

2018 (vs. 2008) MONO COUNTY TOURISM - INDICATOR SUMMARY

Summarized below are key Mono County (countywide) visitor volume and spending estimates for calendar year 2018 (and compared to fiscal year 2008 when this study was last conducted).

- Annual total of 1.73 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
- Annual Total visitor (direct) spending of \$601.3 (\$369) million
- Daily average spending in Mono County of \$983 (\$738) per-visitor group
- 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	\$983 / \$145	33.2% / 83.5%	\$738 / \$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

Throughout the report, numbers in parenthesis () next to the 2018 results are available 2017 results

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

The key visitor volume, visitor days and spending indicators are discussed below by overnight and day visitor volume and share, and shown in the next slide.

- Of Mono County's 2018 total 1.7 (1.5 in 2008 *) million annual visitors, 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 only 16% (12%) of visitor days.
- Finally, for the total \$601 (\$369) million spent in Mono County, overnight visitors spent \$577 (\$354) million or 96% of the total spending, while day visitors spent \$24.6 (\$15.8) million or 4% of total spending both years.

* numbers in parenthesis () next to the calendar 2018 results are fiscal year 2008 results

** visitor days are visitor volume X average days stayed

PAID LODGING GUEST SPENDING SHARE FAR OUTWEIGHS THEIR VOLUME SHARE

Exhibit 1 – Visitor Volume

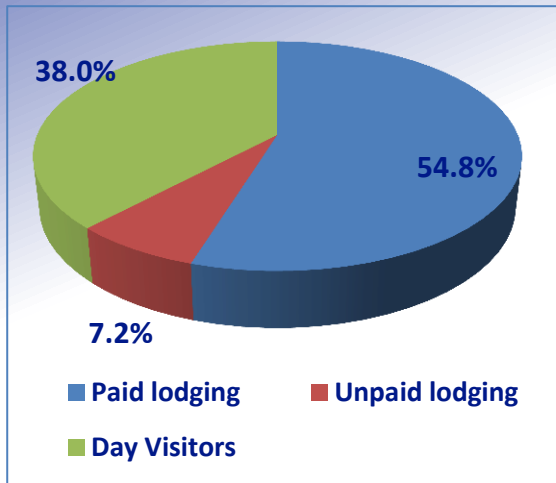


Exhibit 2 – Visitor Days

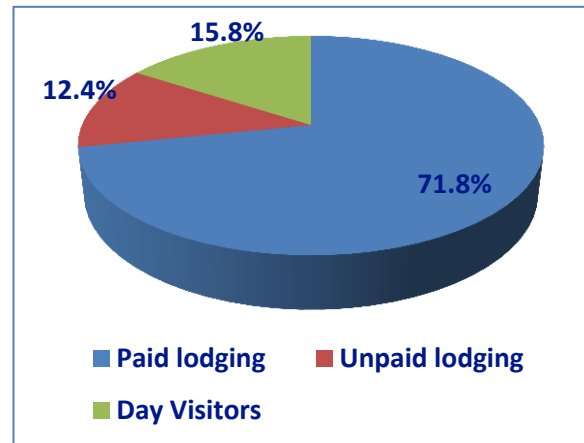
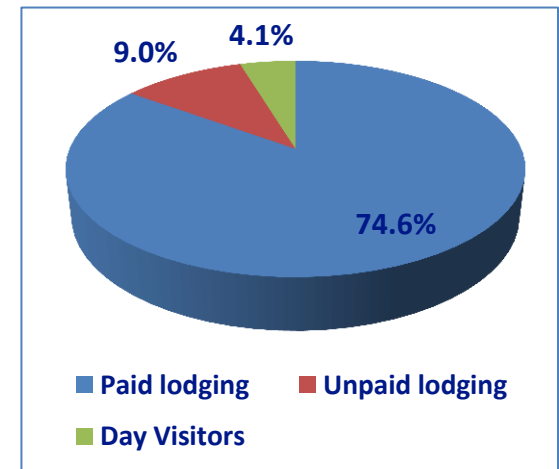


Exhibit 3 -
Visitor Spending

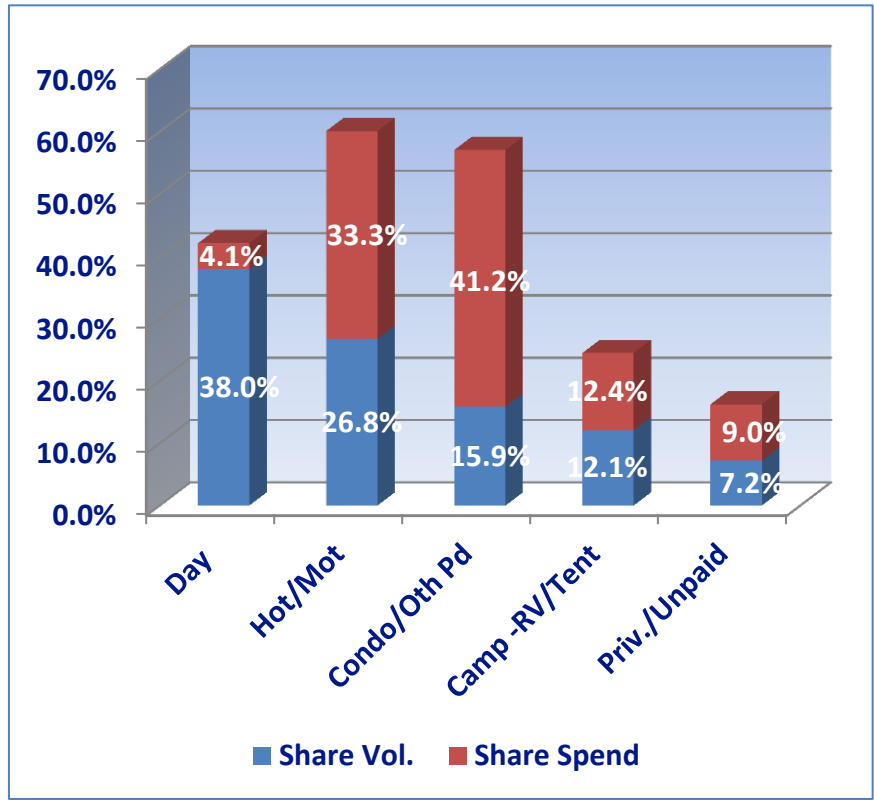


CONDO USERS HIGHEST SPENDING SEGMENT

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 (\$99) million in total or 33% (27%) of the total.
- Campers in RVs/tents accounted for \$74 (\$72) million or 12% (20%) of the total.
- Visitors lodging in private residences (unpaid) spent \$54 (\$28) million, or 9% (8%) of the total.

Exhibit 2 – Volume and Spending Share 2018



INDICATORS BY LODGING SEGMENT - 2018 vs. 2008

Table 2a – 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 Per Group Spending in Mono Co.	Total Annual Expenditures*	Ratio
Hotel/motel/inn	463,467	26.8%	1.89	874,162	21.1%	\$ 229.15	\$ 1,277.64	\$ 200,312,290	33.3%
Condo Rental/Other Paid	274,961	15.9%	4.25	1,167,926	28.1%	\$ 212.01	\$ 3,375.86	\$ 247,613,788	41.2%
Campground/RV Park	209,630	12.1%	4.47	937,500	22.6%	\$ 79.35	\$ 1,094.04	\$ 74,394,819	12.4%
Private Home/Other Unpaid	124,799	7.2%	4.11	513,061	12.4%	\$ 105.91	\$ 966.22	\$ 54,336,054	9.0%
Subtotal Overnight Visitors	1,072,856	62.0%	3.26	3,492,650	84.2%	\$ 165.11	\$ 1,627.27	\$ 576,656,951	95.9%
Day Visitors	657,601	38.0%	1.00	657,601	15.8%	\$ 37.52	\$ 95.82	\$ 24,674,737	4.1%
Total	1,730,457	100.0%	2.40	4,150,251	100.0%	\$ 144.89	\$ 983.44	\$ 601,331,688	100.0%

Table 2b – Mono Co. Tourism Indicators by Lodging Segment - 2008

Visitor/Lodging Category	Individual Visitors	Ratio	Avg. Stay in Mono Co. (Days)	Total Visitor Days	Ratio	Daily Per Capita Spending	Per Group Spending in Mono Co.	Total Annual Spending (direct)	Ratio
Hotel/motel/inn	277,065	18.3%	3.20	886,214	18.8%	\$ 112.09	\$ 1,062.55	\$ 99,340,000	26.9%
Rental Condo/Other paid	260,748	17.2%	4.56	1,189,571	25.3%	\$ 128.91	\$ 2,291.98	\$ 153,350,000	41.5%
Campground/RV park	320,685	21.2%	4.92	1,576,782	33.5%	\$ 46.11	\$ 827.81	\$ 72,710,000	19.7%
Private home/other unpaid	106,736	7.0%	4.69	500,162	10.6%	\$ 56.70	\$ 744.12	\$ 28,360,000	7.7%
Subtotal overnight visitors	965,234	63.7%	4.30	4,152,729	88.2%	\$ 85.19	\$1,235.42	\$ 353,760,000	95.8%
Day Visitors	550,012	36.3%	1.00	550,012	11.7%	\$ 28.72	\$ 73.77	\$ 15,800,000	4.3%
Total	1,515,246	100.0%	3.10	4,702,740	100.0%	\$ 78.58	\$ 738.41	\$ 369,560,000	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

SPENDING BY LODGING SEGMENT

Spending in Mono County by lodging segment is discussed below and shown on the next two slides.

Condo/Other Paid Lodging: While comprising 15% (17%) of total visitor volume, their long 4.3 (4.6) days average stay generated \$247 (\$153) million total direct spending, a 41% (42%) share of the total, the most of any lodging segment. Their per-capita daily spending was \$212 (\$129).

- By category they spent most \$101 (\$65) million on lodging, \$43 (\$20) million for meals out and \$36 (\$20) million for admissions/fees. This spending and stay pattern suggests that condo/other paid lodging guests tend to be Winter skiers.
- **Hotel/Motel/Inn:** at 27% (18%) of visitor volume, they spent the second highest total, \$200 (\$99) million, a 33% (27%) share of total spend, and averaged \$229 (\$112) per-person per-day.
 - Hotel guests spent most on lodging \$105 (\$38) million or 52% (39%) share of their total. They spent \$44 (\$16) million on meals out and \$12 million each for beverages and admissions.
- **Campground RV/tent:** the third highest at 12% (21%) of volume, and 12% (20%) of total spending at \$74 (\$73) million. Of this \$23 (\$14) million was on meals out and \$19 (\$15) million on lodging. They averaged \$79 (\$46) per-person per-day overall.
- **Private home/Unpaid Lodging:** These visitors generally do not pay for lodging. They were 7% (8%) of volume and overall spent a total of \$54 (\$28) million, 9% (8%) of the total, and averaged \$106 (\$57) daily per-person.
 - They spent the most \$19 (\$5) million on admissions and \$14 million (\$7) on meals out.
- **Day Visitors:** The 658,000 (550,000) annual day visitors, 38% (36%) of volume, spent \$25 (\$16) million in Mono County, but only 4% (4%) of the total spent. They spent most on meals out \$9 (\$7) million or 35% (41%) of their total and averaged \$38 (\$29) per-person per day.

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%

* Includes taxes and tips

continued on next slide...

2018 VISITOR SPENDING BY CATEGORY & LODGING TYPE

Table 4a – 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%	\$ -	\$ -	0.0%
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 OF \$841 MILLION

- The \$601 (\$370) million of visitor spending in Mono County represents the direct level.
- Additional spending accrues countywide from:
 - **Indirect benefits** accrue to sectors that provide goods and services such as food wholesalers, utilities, financial or legal services.
 - **Induced benefits** are generated when employees whose incomes are driven directly or indirectly by tourism, spend a portion of that income in the area economy.

- This additional impact is calculated by a "multiplier" that estimates the extent that money from local purchases circulates through the local economy.
 - A higher multiplier indicates greater local spending and/or a more isolated economy. A typical California county multiplier is from 1.3 to 2.5.
 - Mono County's multiplier is 1.4, which reflects its relative isolation where more purchasing would be made within the County.
- Applying the multiplier to direct spending yields an additional \$240 (\$148) million to the county-wide economy, for total direct and indirect impact of \$842 (\$517) million.

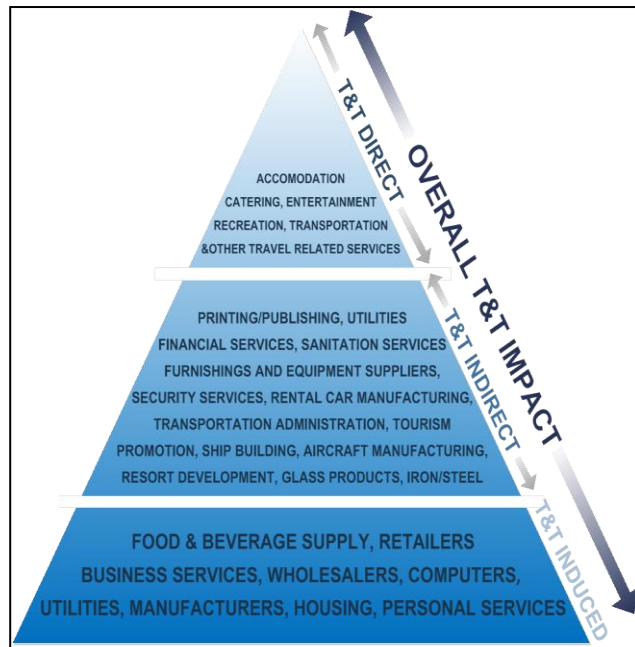


Table 5 - Spending Multiplier Impact

	2018	2008
Total Direct Visitor Spending	\$601,331,700	\$369,560,000
Multiplier	1.4	1.4
Additional Indirect + Induced Impact	\$240,532,700	\$147,824,000
Total Economic 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 (full-time equivalent) 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	Taxable Total Spending	Visitor Spend to Support One Job*	Direct Tourism Jobs	Ratio of Total Jobs
Lodging	\$ 167,215,000	\$ 134,130	1,247	23.3%
Meals	\$ 110,935,000	\$ 134,130	827	15.5%
Beverages	\$ 40,949,000	\$ 134,130	305	5.7%
Shopping/gifts	\$ 30,571,000	\$ 217,600	140	2.6%
Attractions/ Admissions	\$ 73,869,000	\$ 36,295	2,035	38.1%
Activities	\$ 14,765,000	\$ 36,295	407	7.6%
Daily Transport/Parking	\$ 12,202,000	\$ 85,500	160	3.0%
Groceries & Other	\$ 22,662,000	\$ 217,600	218	4.1%
Total	\$ 473,168,000	Avg. Sales / Job	5,340	100.0%

* Source: Visit California, *Cal. Travel Impacts by County 2018p Prelim State & Regional Estimates*, May 2019, Dean Runyan Associates

Section - 3

Mono County Visitor Serving Environment

MONO COUNTY OVERVIEW

- Mono County is located in California's highly rural central eastern region.
- The area is naturally bordered on its east by the majestic Eastern Sierra Mountains and on the west by the state of Nevada.
- The county spans about 100 miles in length from Inyo County, its southern boundary, to Alpine County to its north.
- Mono County is the state's fifth least populated with some 15,000 residents, about half of whom reside in Mammoth Lakes the county's only incorporated town.
- Despite its small population Mono County attracts nearly two million non-local visitors on a year-round basis due to its wealth of natural wonders and related outdoor activities.
- Two main agencies work in tandem to promote the area to non-local visitors, Mono County Economic Development Department and Visit Mammoth Lakes, the town's destination marketing organization (DMO).



MONO COUNTY VISITOR EXPERIENCE

- The area's wide range of amenities and activities create the experience that is Mono County, and also are instrumental to supporting the regional economy through visitors activities and spending.
- Mono County's scenic beauty, fresh air, and majestic natural wonders - from snowy mountain peaks and pristine fresh water lakes - to natural hot springs and forest trails, create the ambiance and the opportunities for outstanding seasonally varied outdoor recreational activities.
- Unique natural wonders include Mono Lake with its geological tufa towers, Devil's Postpile located in Red's Meadow, and the Mammoth Lakes and June Lake mountains and lakes basins, with noted historic site is Bodie State Park a preserved mining town near Bridgeport.
- Mono County has become recognized as a year-round destination:
 - winter features the County's famed skiing and snow spots season
 - spring marks the start of a long fishing season attracting anglers from throughout the state
 - summer attracts visitors from around the world to view the scenery hike, camp, fish and bird watch among other activities, and is heavily traveled as the eastern gateway to Yosemite National Park
 - fall offers brilliant colors rivaling the east coast and for various activities in the still warm season



VISITOR SERVING AMENITIES

- In addition to its natural wonders, the area has a well-developed infrastructure to serve its non-local visitors including:
 - Hotel, motel, inn, condo lodging
 - RV and tent campgrounds
 - Mammoth Yosemite Airport
 - Eastern Sierra Transit (busses)
 - Mammoth Mountain and June Lake ski area
 - Retail shops
 - Spas and hot springs
 - Eating places ranging from food trucks to fine dining
 - Craft beer breweries, wine tasting

- Data for the Mono County lodging market is presented on the next slides, followed by Mammoth Yosemite Airport utilization.

MONO COUNTY LODGING MARKET

Lodging Supply

- The total Mono County lodging market contained 9,165 total units (versus 8,632 in 2011) considered transient and suitable for visitors.
- The lodging market contains a wide range of offerings from basic outdoor campgrounds and rustic cabins to luxury full-service hotels segmented as follows:
 - cabins/tent & RV campsites, by far the largest segment with nearly 5,100 sites/units, or 56% (45%) of total lodging supply
 - hotels, motels, inns with nearly 2,300 rooms/units, or 25% (20%) of supply
 - condos and other paid lodging with about 1,800 units, or 20% (35%) of supply
- Thus as compared to 2011 supply growth appears to be mainly in campgrounds, with some growth in hotels and a decrease in other paid lodging.
- This represents daily available units. As discussed later, not all rooms were open year-round, thus these percentages vary when analyzing ratios by type on an annual basis.

Table 8 – Mono County Overall Lodging Supply

LODGING TYPE	2018		2011	
	Daily Units	Ratio	Daily Units	Ratio
Cabin/Campsite/RV sites	5,096	55.6%	3,871	44.8%
Hotel Motel Inns	2,276	24.8%	1,722	19.9%
Condos/Shared Rental/Other Paid	1,793	19.6%	3,039	35.2%
Total Market Supply	9,165	100.0%	8,632	100.0%

MONO HAS MAINLY CAMPSITES; MAMMOTH HAS MORE HOTELS/CONDOS

- Of the 9,165 total units 4,746 or 52% are in Mono County (excluding Mammoth Lakes) and 4,419 or 48% are in the town.
- Of total Hotel/motel/inns rooms, 82% are in Mammoth versus 18% in Mono County, 87% of condos/other paid lodging is in Mammoth, while 81% of the cabins/campsites area in Mono County.

Table 9a – Lodging Supply by Location

Countywide Supply - Units/Rooms	Daily Room/Unit Supply			Share by Location (100% across)	
	Total	Mono Uninc.	Mamm. Lk.	Mono Co.	Mamm. Lk.
Hotel/motel/inn	2,276	405	1,871	17.8%	82.2%
Cabins/Campsites	5,096	4,106	990	80.6%	19.4%
Condos/Rentals/Other Paid	1,793	235	1,558	13.1%	86.9%
Total Countywide Supply	9,165	4,746	4,419	51.8%	48.2%

- Mono County room supply consists of 87% campsites, 9% hotel/motel/inns and 5% condos/other paid. In Mammoth 42% are hotel/motel, 35% are condos/other and 19% are campsites.

Table 9b – Lodging Supply by Location

Countywide Supply - Units/Rooms	Daily Room/Unit Supply			Share by Type (100% down)	
	Total	Mono Uninc.	Mamm. Lk.	Mono Co.	Mamm. Lk.
Countywide Hotel/motel/inn	2,276	405	1,871	8.5%	42.3%
Countywide Cabins Campsites	5,096	4,106	990	86.5%	22.4%
Condos/Rentals/Other Paid	1,793	235	1,558	5.0%	35.3%
Total Countywide Supply	9,165	4,746	4,419	100.0%	100.0%

ANNUAL AND SEASONAL TRANSIENT LODGING ROOMS/UNITS SUPPLY

- On an annualized basis, 2.83 (2.58) million transient paid lodging rooms, units, and camp spaces in hotels/motels/inns, rental condos, vacation rentals, cabins, and RV/tent campgrounds were available countywide in 2018. A table of the lodging supply by location, type and season is shown on the next slide.
- Due to weather and visitor activities, lodging supply varies seasonally.
 - The most, 843,200 (780,600) rooms/units or 30% (30%) of the total supply were available in the summer
 - 833,300 (670,000) or 29% (26%) rooms/units were available in spring
 - 708,500 (670,000) or 25% (26%) rooms/units were available in fall
 - just 449,900 (460,800) or 16% (18%) were available in winter
- In winter virtually all the closures were in unincorporated Mono County which has the vast majority of campgrounds and small motels/inns, while Mammoth Lakes lodging supply peaks in winter due to the ski season.
 - In unincorporated Mono County 82% of motel rooms and 62% of campsites/cabins are available on an annualized basis with most closures between December and March.

ANNUAL AND SEASONAL TRANSIENT LODGING ROOMS/UNITS SUPPLY

Table 10 – Mono County Supply By Season, Type and Locale

Supply	Total Mono Co					Mono Co (uninc.)					Mammoth Lakes				
	Total	Hotel/ motel	Condo	Camp sites	Other Paid	Total	Hotel/ motel	Condo	Camp- sites	Other Paid	Total	Hotel/ motel	Condo	Camp- sites	Other Paid
Winter	449,875	198,127	152,280	77,058	22,410	52,165	29,737	12,060	1,278	9,090	397,710	168,390	140,220	75,780	13,320
Spring	833,265	206,366	153,972	50,268	22,659	431,136	36,105	12,194	373,646	9,191	402,129	170,261	141,778	76,622	13,468
Summer	843,180	209,392	155,664	55,216	22,908	436,632	37,260	12,328	377,752	9,292	406,548	172,132	143,336	77,464	13,616
Fall	708,548	206,658	155,664	323,318	22,908	302,000	34,526	12,328	245,854	9,292	406,548	172,132	143,336	77,464	13,616
Total	2,834,868	820,543	617,580	1,305,860	90,885	1,221,933	137,628	48,910	998,530	36,865	1,612,935	682,915	568,670	307,330	54,020

Sources: Mono County lodging, Visit Mammoth Lakes DMO and Lauren Schlau Consulting

ANNUAL AND SEASONAL LODGING ROOMS/UNITS DEMAND

- Unlike supply, countywide lodging demand * peaks in summer as shown below, due to both higher lodging availability and demand dispersed throughout the county not concentrated in Mammoth Lakes as in the winter.
- Summer 2018 demand reached 294,800 occupied rooms/units/spaces, followed by 237,400 occupied rooms/units in winter, with 208,900 in spring and 200,500 in fall.

Table II – Lodging Rooms/Units/Spaces Demand in Mono County

Demand	Total Mono Co					Mono Co (uninc.)					Mammoth Lakes				
	Total	Hotel/ motel	Condo	Camp sites	Other Paid	Total	Hotel/ motel	Condo	Camp sites	Other Paid	Total	Hotel/ motel	Condo	Camp sites	Other Paid
Winter	237,380	104,378	81,325	43,951	7,725	6,715	6,715	n/a	n/a	n/a	230,665	97,663	81,325	43,951	7,725
Spring	208,931	98,783	67,352	36,399	6,398	17,900	17,900	n/a	n/a	n/a	191,031	80,882	67,352	36,399	6,398
Summer	294,784	140,216	94,512	51,078	8,978	26,716	26,716	n/a	n/a	n/a	268,068	113,500	94,512	51,078	8,978
Fall	200,478	93,153	65,625	35,466	6,234	14,344	14,344	n/a	n/a	n/a	186,134	78,809	65,625	35,466	6,234
Total	941,573	436,529	308,814	166,894	29,335	65,675	65,675	-	-	-	875,898	370,854	308,814	166,894	29,335

Sources: Mono County lodging, Visit Mammoth Lakes DMO and Lauren Schlau Consulting

* Lodging demand for unincorporated Mono County is only available for motels and campsites; therefore the total Mono County demand represents the volume for available data as shown above.

COUNTYWIDE OCCUPANCY AT 54%

- Countywide 2018 net occupancy (excluding properties for which we lack occupancy rates) was at 54%.
- Consistent with demand countywide occupancy was highest in summer at 66%, followed by 56% in winter, 48% in spring and 46% in fall.
- Based on the available data we have calculated unincorporated Mono County annual occupancy (net of closures) at 48% and for Mammoth Lakes at 54%.

Table 12 – Mono County Occupancy Rates

Occupancy Rate	Total Mono Co					Mono Co (uninc.)					Mammoth Lakes				
	Total	Hotel/motel	Condo	Camp sites	Other Paid	Total	Hotel/motel	Condo	Camp sites	Other Paid	Total	Hotel/motel	Condo	Camp sites	Other Paid
Winter	55.5%	52.7%	58.0%	58.0%	58.0%	22.6%	22.6%	n/a	n/a	n/a	58.0%	58.0%	58.0%	58.0%	58.0%
Spring	47.7%	47.9%	47.5%	47.5%	47.5%	49.6%	49.6%	n/a	n/a	n/a	47.5%	47.5%	47.5%	47.5%	47.5%
Summer	66.4%	67.0%	65.9%	65.9%	65.9%	71.7%	71.7%	n/a	n/a	n/a	65.9%	65.9%	65.9%	65.9%	65.9%
Fall	45.5%	45.1%	45.8%	45.8%	45.8%	41.5%	41.5%	n/a	n/a	n/a	45.8%	45.8%	45.8%	45.8%	45.8%
Total	53.8%	53.2%	54.3%	54.3%	54.3%	47.7%	47.7%	n/a	n/a	n/a	54.3%	54.3%	54.3%	54.3%	54.3%

Sources: Mono County lodging, Visit Mammoth Lakes DMO and Lauren Schlau Consulting

MAMMOTH YOSEMITE AIRPORT - FLIGHTS

- The Mammoth Yosemite Airport (MMH) is located on US HWY 395, six miles southeast of and owned by the town of Mammoth Lakes.
- While mainly a general aviation facility, United operates scheduled year-round flights to/from Los Angeles and seasonally to/from San Francisco, and Denver as of December.
- Semi-private Jet Suite (in partnership with Jet Blue) operates seasonally to/from Burbank and Orange County.
- In 2018 a total of 568 roundtrip flights were completed at the airport with nearly half 284 in the first three months during the popular ski season.

Table 13 – Roundtrip Flights to/From Mammoth Yosemite Airport 2018

Mon/Flights	TOTAL	Share	LAX	SFO	SAN	BUR	DEN*
January	94	16.6%	32	28	18	17	0
February	87	15.2%	30	26	15	16	0
March	103	18.1%	46	25	16	17	0
April	47	8.3%	33	2	10	2	0
May	22	3.9%	22	0	0	0	0
June	29	5.1%	29	0	0	0	0
July	31	5.5%	31	0	0	0	0
August	30	5.3%	30	0	0	0	0
September	19	3.3%	19	0	0	0	0
October	17	3.0%	17	0	0	0	0
November	25	4.4%	25	0	0	0	0
December	64	11.3%	30	13	0	8	13
Total	568	100.0%	344	93	58	60	13

* Denver service started December 2018

Source: Visit Mammoth Lakes DMO

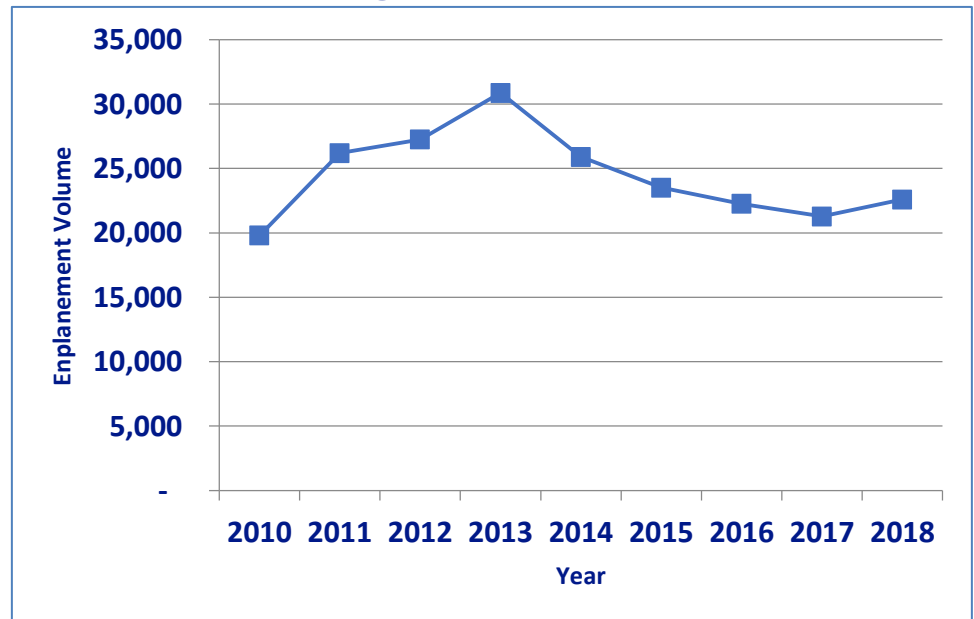
MAMMOTH YOSEMITE AIRPORT - PASSENGERS

- In 2018, 22,396 passengers used the Mammoth Yosemite Airport, up 5% from 21,278 in 2017.
- Since 2010 passenger volume has fluctuated peaking at nearly 31,000 in 2013, then decreasing, but rebounding slightly in 2018 as shown in the graph below.

Table 14 – Monthly M - Y Airport Passenger Volume 2017 & 2018

M-Y A Passengers (arrivals + departures)	2018	2017
	Total	Total
January	4,144	2,458
February	3,671	2,738
March	3,907	4,059
April	2,395	1,935
May	810	1,089
June	920	834
July	1,192	1,223
August	1,166	1,225
September	846	700
October	661	595
November	819	645
December	1,865	3,777
Total	22,396	21,278

Exhibit 3 – Annual M-Y Airport Passengers 2010-2018



Section - 4

Detailed Mono County Visitor Profile

VISITOR ORIGIN AREA VARIES BY SEASON, ACTIVITIES, LODGING

- Overall nearly half 48% (71%) of visitors were California residents, 28% (19%) came from Other U.S. areas, with 24% (11%) International in origin.
- Origin varies notably by season with 57% from California and 34% from Other U.S. areas in winter, while 35% are International in summer and 38% were Californians.
- Far more relative to their total shares, 44% of hotel guests were International and 69% of other paid (e.g. condo) lodging guests were Californians.
- A far higher share of anglers especially as well as hikers were Californians relative to their share of the total or for overall outdoor recreation visitors.

Table 15 – Overall Residence

	Total Visitor	Winter	Spring	Summer	Fall	Purposes (all)	Activities		MC Lodging		
						Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camping
Base: Visitor	1032	224	268	213	327	553	298	199	410	195	169
California	47.7%	56.9%	51.1%	37.9%	45.5%	68.2%	67.2%	83.0%	34.5%	69.9%	61.6%
Other United States (excl. CA)	27.9%	34.1%	24.8%	26.5%	28.6%	22.0%	19.5%	16.1%	21.6%	17.8%	27.4%
Another country	24.4%	9.0%	24.2%	35.5%	25.9%	9.8%	13.4%	0.9%	43.9%	12.3%	10.9%

VISITOR RESIDENCE SHIFTS OUTSIDE OF CAL ESP. TO INTERNATIONAL

- Of U.S. residents, California was #1 state for all segments with Nevada second and Oregon third.
- Note, a much higher share 80% of other paid lodging guests were Californians as were hikers at 78% and anglers at 84% relative to Californians share of the total.
- The top 10 states accounted for 90% of total Mono County visitation.

Table 16 – 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 top feeder per 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 17 – 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%

* this was not asked in 2008

EUROPE BY FAR LEAD INT'L. FEEDER BUT DOWN VS. 2008, WITH ASIA HIGHER

- Half, 51% (64%) of International visitors were from Europe, with 16% (9%) from Asia and 8% (n/a) from the United Kingdom
- Of visitors in Mono County for outdoor recreation, while 58% were from Europe still the top feeder, 21% were from the U.K. for this activity segment and well above their share of the total.

Table 18 – 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

- Overall 45% (65%) named Mono County as the main destination of this trip.
- This varied by origin; typically the farther away, the less likely one main area is visited, as is the case here. Where 71% (83%) of Californians named Mono County their main destination, it was 37% (47%) for Other U.S. residents and only 5% (25%) for International.
- Main destination also varied by season and is consistent with origin; Mono County was the main area named in the Winter by 58% (94%) when California visitation is highest, whereas it is lowest in Summer at 36% (62%) when International share was highest.

Table 19 – 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 on 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%
So. Cal. areas (Sta. 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 Nor. Cal. areas (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%

8 IN 10 IN THE AREA WERE “VISITING” MONO COUNTY

- Overall, 82% (94%) of Mono County visitors said they were “visiting” Mono County; that is, their main destination and others on this trip. (this does not total 100% for Mono County as some were passing through or not “visiting”).
- Visitation also varied by origin with 94% (98%) of Californians versus 83% (83%) of Other U.S. and 59% (91%) of International visitors visiting Mono County.
- It also varied by lodging type; 69% (94%) of hotel guests were visiting Mono County versus higher shares, 92% (95%) in other paid lodging, 98% (n/a) in private lodging and 89% (99%) of campers as shown below.

Table 20 – All Areas Visiting This Trip

	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	
MONO COUNTY	82.2%	93.7%	82.8%	59.3%	94.3%	94.5%	97.8%	68.8%	92.3%	97.5%	88.7%	
Yosemite National Park	34.5%	18.2%	29.8%	71.7%	23.0%	34.1%	11.4%	49.0%	19.4%	18.8%	26.7%	
Other Eastern Sierra areas on Highway 395	33.0%	31.8%	37.8%	29.8%	37.7%	51.2%	36.0%	20.8%	32.1%	29.9%	32.2%	
Reno, Tahoe or Las Vegas Nevada	31.3%	12.6%	28.3%	71.3%	12.4%	14.2%	5.4%	43.7%	13.8%	5.6%	21.9%	
California and/or other Western States	21.9%	1.7%	20.5%	63.0%	7.2%	10.2%	3.6%	40.8%	10.1%	7.7%	15.7%	
Death Valley	19.6%	2.5%	18.4%	54.3%	3.8%	4.1%	2.1%	33.4%	7.7%	0.6%	11.3%	
Other Nor. Calif. areas (SFO, Tahoe, etc.)	16.7%	3.4%	16.8%	42.7%	7.2%	7.4%	1.6%	27.0%	6.7%	4.6%	14.2%	
So. Calif. areas (Sta. Barbara to San Diego)	13.3%	2.8%	24.5%	21.0%	4.9%	5.2%	1.6%	8.5%	5.1%	2.2%	9.8%	
Other Nevada or Western States areas	10.0%	1.2%	11.7%	25.3%	2.2%	2.7%	0.9%	19.1%	5.5%	2.8%	8.4%	
All California	7.5%	1.7%	10.6%	15.3%	5.2%	6.4%	2.0%	4.7%	1.9%	3.1%	5.6%	
USA (California plus other areas)	5.4%	0.3%	5.5%	15.3%	1.5%	2.2%	1.3%	11.0%	4.1%	1.9%	5.4%	
All other areas (not listed above)	3.0%	2.1%	4.6%	2.6%	0.8%	1.3%	0.0%	1.8%	0.5%	0.0%	2.1%	

6 IN 10 ARE PAST VISITORS

- Overall 62% (64%) have visited Mono County, thus 38% (36%) were new to Mono County in the past three years.
- All visitors took about 1 trip here in the past three years while repeat visitors came about 3 (5) times, or about once a year.
- More trips taken here in Winter by past visitors but many more first-timers in Summer likely due to more International visitors in that season.

Table 21 – First-Time or Past Visitor

	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

7 IN 10 LIKELY TO RETURN TO MONO COUNTY

- Overall 73% indicated being highly (i.e., extremely and very) likely to return to Mono County; just 11% were unlikely.
 - The mean rating for likelihood was 4.0 (out of 5) – very likely.
- Likelihood is somewhat tied to distance; 87% of Californians and 73% of Other US versus 45% of International visitors are highly likely to return.
- By activity shows that 96% of anglers versus 79% of hikers were highly likely to return, but as a higher share of hikers are International they would be less likely.

Table 22 – Likelihood to Return to Mono County

	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
Base:	1032	524	273	235	553	298	199	410	195	146	169
5 - Extremely likely	44.6%	65.5%	42.0%	6.8%	65.8%	62.0%	80.5%	35.6%	65.3%	80.2%	56.4%
4 - Very likely	28.1%	21.4%	30.7%	38.1%	18.9%	17.1%	15.0%	45.7%	19.6%	13.3%	29.0%
5 + 4 Extremely + Very Likely:	72.7%	86.9%	72.8%	44.9%	84.8%	79.1%	95.5%	81.4%	84.8%	93.5%	85.4%
3 - Somewhat likely	16.0%	9.2%	17.8%	27.5%	7.0%	10.6%	3.0%	10.1%	7.9%	5.2%	7.7%
2 - Somewhat unlikely	4.3%	1.4%	3.3%	11.1%	4.6%	5.3%	1.4%	2.1%	4.7%	1.2%	1.0%
1 - Very unlikely	6.3%	2.3%	5.9%	14.7%	2.9%	4.4%	0.0%	4.9%	1.5%	0.0%	5.6%
0 - Not at all likely	0.6%	0.2%	0.2%	1.9%	0.7%	0.6%	0.0%	1.5%	1.1%	0.0%	0.4%
Mean likelihood (5 – 1)	4.0	4.5	4.0	3.1	4.4	4.3	4.7	4.0	4.4	4.7	4.3

VISITORS RETURN TO MONO COUNTY FOR AREA BEAUTY, LOVING IT & RECREATION

- Visitors likely to return indicated their main reasons to be the area's beauty/scenery by 57%, that 41% love the area, 39% cite the great outdoor recreation and 35% say its great for a vacation.

Table 23 – Why Likely to Return

	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	Camping
Base: Likely to return	947	514	255	178	518	272	198	372	181	143	158
Beautiful/scenic	56.7%	63.2%	56.7%	39.8%	67.4%	75.9%	65.5%	41.3%	70.9%	63.1%	68.2%
Love the area	40.8%	54.0%	28.2%	24.3%	57.8%	67.1%	57.8%	24.0%	58.1%	66.6%	47.0%
Great outdoor recreation	38.9%	47.9%	41.3%	11.9%	63.8%	64.0%	67.2%	26.3%	60.8%	60.0%	51.3%
Great place for a vacation	35.4%	33.7%	31.5%	45.6%	40.0%	45.8%	44.9%	45.4%	40.6%	38.7%	33.2%
Lots to see and do	31.1%	35.0%	27.8%	25.7%	40.0%	47.8%	42.3%	24.9%	44.1%	44.4%	37.7%
Been coming here for years	24.8%	37.8%	17.3%	2.0%	38.8%	42.3%	49.6%	12.7%	42.8%	50.9%	30.3%
Friends/family likes to come here	18.1%	24.6%	18.0%	1.2%	31.5%	35.9%	29.8%	9.3%	34.1%	41.6%	19.4%
Best place (for what I want)	17.8%	24.0%	14.4%	6.8%	28.8%	27.7%	31.6%	9.3%	31.4%	26.2%	18.8%
Friendly/good service in area venues	8.0%	12.6%	4.0%	1.7%	14.1%	18.8%	18.6%	4.1%	19.3%	10.9%	7.8%
Great value for the money	5.8%	9.4%	3.3%	0.0%	12.0%	15.4%	17.6%	1.9%	18.0%	7.5%	3.7%
Other (specify)	11.2%	11.6%	16.2%	2.9%	11.6%	13.3%	11.8%	4.4%	6.6%	13.1%	10.7%

DISTANCE MAIN REASON FOR LESS LIKELY TO REVISIT MONO COUNTY

- For the 11% unlikely to return to Mono County, 79% cited time/distance to get here, while 16% noted the area is hard to access.
- Again this appears to be mainly a function of distance as 84% of International visitors unlikely to return cited this reason

Table 24 – Why Unlikely to Return

	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	Camping
Base: Unlikely to return	85	10	18	57	35	26	1	38	14	3	11
Takes too long to travel here	78.7%	59.1%	78.6%	84.1%	62.8%	78.8%	0.0%	81.6%	49.1%	100.0%	44.4%
Hard to get here - inaccessible	15.8%	7.0%	10.2%	20.5%	16.5%	12.8%	0.0%	26.2%	18.9%	0.0%	36.1%
Not enough time	8.8%	23.5%	0.0%	8.2%	8.4%	0.9%	0.0%	1.9%	11.3%	25.0%	0.0%
Prefer other areas	2.4%	14.2%	0.0%	0.0%	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor value for the money	0.8%	4.6%	0.0%	0.0%	2.5%	3.6%	0.0%	0.0%	7.5%	0.0%	0.0%
Other (specify)	12.2%	17.4%	18.0%	8.5%	22.0%	21.0%	100.0%	7.8%	32.1%	0.0%	19.4%

VISITORS IN MONO COUNTY MAINLY FOR OUTDOOR RECREATION & VACATION

Respondents indicated both their *main* purpose for visiting Mono County on this trip, shown below, and their *other* purposes shown on the next slide.

- No one main purpose stands out as 25% (29%) of visitors came to Mono County for outdoor recreation with 22% (39%) here for vacation/leisure.
- Main purpose varies by season and residence, with outdoor recreation higher in Winter at 41% (82%) and among Californians at 40% (43%), while vacation is higher in Summer at 27% (43%) and Fall also 27% (32%), and among International visitors at 36% (63%).

Table 25 - 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%

NEARLY HALF VISITING FOR VACATION, ESP. IN SUMMER & FALL

- For main + other purposes, vacation/leisure tops the list for all visitors at 45% (81%) whereas outdoor recreation is third at 41% (66%) after sightseeing/ exploring at 45% (74%).
- However in Winter, outdoor recreation at 49% (96%) was first in Winter and second in Summer at 56% (60%), whereas 50% (88%) came for sightseeing in Fall.
- Note hikers tend to do a wider range of activities whereas anglers concentrate on fishing.

Table 26a – 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%

REASONS FOR VISITING BY MONO COUNTY SITES VISITING

It is worthwhile especially as applicable to marketing and messaging to look at visitors' purposes by Mono County sites visiting as discussed and shown below.

- Vacation/leisure was the top overall reason as mentioned. It varies by Mono County venue/sights visited with vacation being the top reason for visitors to Mammoth Lakes town, June Lake area, Mammoth Lakes basin, Bridgeport, Coleville, Lee Vining, Twin Lakes and Bodie.
- Perhaps not surprisingly, for Mammoth Mountain and Convict Lake visitors recreation is first.

Table 26b – Purposes by Places Visiting in Mono County

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake	Mam. Mtn.	Mam.-Lakes Basin	Bridgeport	Coleville / Walker/ Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
Vacation/pleasure/general visit	54.1%	51.3%	61.3%	64.2%	64.0%	74.3%	64.9%	59.4%	61.3%	55.6%	59.2%	59.4%
Sightseeing or exploring the area	44.6%	52.3%	58.3%	54.7%	40.4%	54.7%	37.0%	37.4%	53.4%	65.4%	45.9%	39.2%
Outdoor recreation	41.4%	24.1%	55.1%	54.2%	74.8%	63.9%	39.1%	25.9%	45.8%	66.2%	45.2%	25.7%
Visiting Yosemite	27.9%	36.0%	22.8%	16.8%	15.6%	29.5%	25.6%	43.5%	33.0%	15.7%	18.2%	43.4%
Visit natural wonders/attractions	26.2%	38.2%	26.0%	27.4%	23.7%	33.4%	26.4%	29.9%	31.2%	28.5%	25.4%	45.0%
Visit historic sites or museum	20.5%	29.2%	17.2%	20.9%	17.3%	17.8%	29.1%	24.0%	28.5%	15.1%	26.0%	47.6%
Just passing through to another place	20.4%	24.0%	18.4%	11.4%	6.6%	10.5%	15.2%	3.1%	20.8%	12.4%	1.9%	12.0%
Visit relatives/friends/social/personal	9.6%	6.4%	12.1%	7.4%	17.4%	20.6%	2.9%	1.3%	12.6%	9.9%	6.3%	6.4%

VISITORS COME TO MONO COUNTY FOR SCENIC BEAUTY & ACTIVITIES

Why visitors came to Mono County *for this trip* is discussed and shown below.

- Nearly half, 46% of visitors came to Mono County specifically for its scenic beauty, for 34% it was part of a larger itinerary and 27% came for the activities here.
- While scenic beauty was the top reason in each season, 36% in Summer and 31% in Fall came for activities.

Table 27 - Why Came to Mono County Rather Than Elsewhere (>10%)

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities		MC Lodging		
						CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base: vacat./sightseeing	791	122	209	179	281	372	209	210	244	154	337	142	142
Scenic beauty/beautiful area	45.7%	50.2%	47.8%	49.5%	39.4%	50.2%	49.2%	36.2%	60.9%	47.6%	27.0%	47.3%	50.1%
Part of a larger itinerary	33.7%	25.3%	34.3%	43.0%	29.4%	12.6%	29.4%	68.9%	22.1%	10.0%	47.1%	17.4%	18.0%
Has the activities I/we want to do	27.2%	23.4%	17.6%	36.4%	31.1%	35.6%	27.2%	14.7%	46.1%	47.6%	26.8%	38.7%	36.3%
Many things to see and do	22.7%	29.9%	15.6%	32.2%	19.8%	27.4%	24.2%	14.5%	39.8%	35.3%	15.7%	35.6%	26.7%
Specifically for outdoor recreation	20.2%	21.8%	16.1%	29.0%	16.9%	30.2%	22.0%	3.7%	44.0%	47.8%	12.9%	34.2%	36.1%
Great weather	18.6%	17.5%	14.5%	27.8%	16.0%	25.9%	15.4%	10.3%	39.9%	31.3%	9.2%	29.7%	19.7%
Relaxing area & activities/good getaway area	16.7%	21.6%	16.0%	19.4%	13.5%	25.5%	10.6%	8.6%	32.0%	28.9%	9.6%	25.9%	21.5%
Like/love the area/been here many times	14.4%	11.5%	14.3%	17.4%	13.6%	25.3%	10.5%	1.5%	31.2%	33.0%	9.0%	29.7%	22.7%
Good for families/family-friendly	11.6%	16.2%	10.0%	20.3%	5.1%	17.7%	10.2%	3.7%	25.3%	27.1%	4.0%	36.2%	13.3%
Friendly people	10.4%	7.4%	10.4%	18.3%	5.7%	17.1%	10.1%	0.5%	25.6%	27.5%	3.3%	23.7%	13.3%
Clean air/good environment	9.9%	13.5%	9.3%	11.3%	8.2%	18.6%	4.2%	1.8%	19.1%	27.3%	6.1%	23.0%	15.0%

FISHING, HIKING MAIN OUTDOOR ACTIVITY

- For those doing outdoor activities, 28% were here mainly to fish and 26% mainly to hike.
- Not surprisingly, skiing with 49% was highest in Winter, with fishing highest in Spring at 40% when the season opens, while 44% were hiking in Summer when trails are open.
- 56% of International recreation visitors hiked in Mono County, more than any segment.

**Table 28a – Main Outdoor Recreation Activity
(>2%)**

	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%

FISHING, HIKING MAIN OUTDOOR ACTIVITY BUT THIS VARIES FOR SOME SITES

- In looking at main activity by sites visited shows some interesting differences, as circled below for Mammoth Mountain, Bridgeport, Coleville, Lee Vining, Convict Lake and Bodie.

Table 28b – Main Outdoor Recreation Activity by Sites Visited (>1%)

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake	Mam. Mtn.	Mam.-Lakes Basin	Bridgeport	Coleville / Walker / Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base: Outdoor activities	553	150	296	204	145	139	75	38	99	127	57	57
Fishing	27.8%	25.0%	24.3%	36.4%	6.2%	22.6%	44.1%	43.4%	19.5%	44.4%	56.4%	15.7%
Hiking	25.7%	28.9%	30.6%	23.1%	9.0%	35.0%	8.0%	3.1%	46.3%	20.5%	11.6%	40.9%
Alpine Skiing - downhill	11.9%	7.6%	15.1%	12.1%	56.4%	10.5%	2.9%	0.0%	2.3%	10.1%	0.9%	0.8%
Camping	6.3%	6.3%	8.3%	5.2%	0.0%	7.0%	3.9%	2.0%	4.4%	8.8%	2.9%	7.8%
Snowboarding	3.2%	0.4%	1.9%	3.8%	11.9%	3.4%	0.9%	0.0%	0.3%	0.6%	0.0%	0.0%
Off-road motor sports	3.1%	0.4%	0.2%	1.5%	0.6%	0.2%	12.4%	20.7%	0.3%	2.8%	0.0%	5.4%
Photography	2.8%	8.1%	2.0%	3.3%	0.6%	1.5%	0.4%	0.0%	4.6%	2.8%	1.4%	4.1%
Rock-climbing	2.5%	7.1%	1.4%	2.2%	2.4%	0.2%	5.7%	0.0%	5.5%	1.6%	1.5%	9.9%
Nordic (x-c) skiing/skating	2.5%	0.0%	0.7%	0.3%	2.6%	0.9%	0.8%	0.0%	1.0%	0.0%	14.0%	0.8%
Boating	1.8%	0.2%	2.6%	1.7%	0.0%	1.1%	5.3%	0.0%	0.0%	0.0%	0.0%	0.4%
Skiing/snowboarding - backcountry	1.8%	1.5%	1.8%	0.9%	2.3%	3.9%	0.0%	1.0%	2.0%	1.7%	0.5%	0.0%

VISITORS CAME FOR HIKING AND FISHING OVERALL; DIFFERENCES BY SEASON

The table on the next page shows all the outdoor activities (main + other) in which visitors engaged, as discussed below.

- Overall, 57% (47%) engaged in hiking and 40% (39%) in fishing by far the top two.
- However, the top activities vary by season as would be expected.
 - in Winter 52% (75%) were skiing (downhill)
 - in Spring 58% (45%) were fishing,
 - in Summer 80% (65%) were hiking
 - in Fall 64% (59%) were hiking, as well as 40% (69%) who were taking photos
- The results also show the extent that hikers and anglers were engaged in other activities, with hikers doing more than anglers while in Mono County.

ALL OUTDOOR ACTIVITIES (MAIN + OTHER)

Table 29 – All (Main + Other) Outdoor Activities (>4%)

	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	Camping
Base: Outdoor activities	553	155	123	139	136	363	132	58	298	199	143	159	118
Hiking	57.2%	21.1%	55.3%	79.8%	64.1%	56.4%	50.6%	78.0%	100.0%	55.4%	52.1%	54.2%	64.7%
Fishing	40.4%	3.5%	58.4%	46.9%	45.3%	49.1%	29.6%	3.8%	39.1%	100.0%	36.7%	45.9%	57.3%
Camping	21.4%	1.8%	18.9%	29.5%	31.8%	19.1%	32.4%	12.6%	27.6%	25.4%	9.3%	5.6%	54.2%
Photography	20.1%	13.3%	11.3%	16.9%	40.3%	19.0%	21.3%	25.1%	27.3%	16.2%	30.9%	12.7%	30.4%
Alpine Skiing - downhill	13.6%	51.8%	9.5%	0.2%	0.0%	14.8%	11.1%	10.3%	7.8%	3.0%	10.4%	22.0%	3.7%
Hot Springs	12.2%	9.8%	10.7%	15.6%	12.0%	12.7%	11.6%	10.5%	14.9%	13.7%	10.9%	9.5%	19.4%
Boating	10.1%	0.0%	22.1%	13.3%	1.7%	12.6%	4.9%	4.8%	12.7%	20.9%	2.9%	18.8%	11.5%
Activities with my/our dog	8.4%	1.8%	10.0%	10.9%	9.3%	8.8%	9.5%	2.7%	10.4%	14.2%	3.5%	7.3%	11.0%
Kayaking	7.2%	0.3%	5.7%	17.6%	2.2%	9.3%	4.0%	0.0%	11.8%	10.9%	2.7%	5.9%	13.4%
Snowboarding	7.1%	30.6%	2.4%	0.0%	0.0%	8.4%	5.8%	1.1%	2.8%	0.8%	4.3%	16.4%	1.3%
Mountain biking/racing	5.5%	0.5%	5.1%	8.5%	7.0%	5.9%	6.2%	1.6%	7.6%	10.2%	5.6%	5.9%	6.5%
Rock-climbing	5.2%	1.5%	7.6%	5.3%	5.8%	3.9%	10.9%	1.1%	8.1%	4.1%	2.9%	0.5%	11.3%
Off-road motor sports	4.9%	2.2%	7.3%	2.4%	7.9%	4.7%	6.6%	2.7%	2.8%	4.5%	5.9%	3.7%	3.1%
Bicycle riding/road cycling	4.6%	0.0%	4.6%	8.4%	4.1%	5.9%	2.2%	1.1%	6.4%	6.7%	4.0%	8.0%	1.6%
Nordic Skiing - cross-country/skating	4.3%	19.0%	0.6%	0.4%	0.0%	3.5%	8.7%	0.0%	2.2%	0.0%	1.9%	5.8%	1.0%
Bird watching	4.2%	0.5%	3.1%	4.2%	8.9%	5.2%	1.7%	2.8%	6.4%	5.8%	5.9%	1.5%	5.8%

BAIT & HIKING

- For those fishing, 52% used bait, 29% used artificial lures, the two main types.

Table 30 – Bait Type

	Total Visitor	Season		
		Spring	Summer	Fall
Base: Fishing	199	70	65	56
Bait	51.5%	57.0%	52.5%	44.5%
Artificial lures	28.7%	31.1%	25.9%	30.9%
Fly	14.9%	9.4%	13.5%	20.4%
Backcountry	4.9%	2.5%	8.1%	4.3%

- For those hiking, 87% were day hikers, but this varies by residence and lodging type as shown.

Table 3 1a – Hiking

	Total Visitor	Residence			MC Lodging		
		CA	Other U.S.	Int'l	Hot/Mot Inn	Other paid	Camp-ing
Base: Hiking	298	192	65	41	71	79	78
Day hiking	87.0%	91.2%	70.9%	89.4%	86.2%	95.9%	83.0%
Backpack/overnight	13.0%	8.8%	29.1%	10.6%	13.8%	4.1%	17.0%

- Almost all, 91% did *not* use the Pacific Coast or John Muir trail but 22% from Other U.S. areas did use these trails.

Table 3 1b – Trails Hiked

Used PC or JM Trail	Total Visitor	Residence		
		CA	Other U.S.	Int'l
Base: Hiking	298	192	65	41
No	91.4%	95.2%	77.7%	92.3%
Yes	8.6%	4.8%	22.3%	7.7%

HIGH VISITATION OF MONO COUNTY PLACES/SITES

- Overall 96% of Mono County visitors went to a range of Mono County sites/places.
- Of visitors' *primary* place to visit 21% went to Mono Lake and 16% to Mammoth Lakes (town), the top two.
- By season, 24% in Winter went to Mammoth Mountain, in Spring 35% went to Mono Lake, Summer visitors went various places, and in Fall 23% mainly went to Mammoth Lakes town.

Table 32 – Primary Mono County Sites/Places Visited

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities		MC Lodging		
						CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/ Inn	Other paid	Camping
Base:	1032	224	268	213	327	524	273	235	298	199	410	195	169
Mono Lake	21.0%	5.0%	34.7%	18.0%	17.8%	12.3%	23.8%	34.9%	7.6%	1.9%	30.4%	2.6%	10.4%
Mammoth Lakes Town	15.8%	17.9%	9.6%	14.4%	22.6%	17.5%	14.4%	14.0%	22.5%	10.8%	13.0%	23.8%	16.7%
June Lakes area	9.0%	9.1%	5.7%	8.9%	12.7%	13.7%	4.7%	4.7%	13.6%	20.9%	10.5%	16.1%	11.7%
Mammoth Mountain (bike park, gondola, ski area)	6.2%	24.2%	3.4%	1.5%	1.7%	8.9%	4.4%	3.1%	7.2%	1.6%	5.8%	17.0%	2.9%
Just passing through	6.2%	15.8%	3.4%	7.1%	2.6%	3.0%	11.0%	6.8%	0.7%	0.0%	1.6%	0.1%	2.1%
Mammoth - Lakes Basin/x-c ski area	5.6%	4.8%	3.6%	10.0%	4.9%	8.1%	4.6%	1.8%	12.1%	14.1%	4.4%	17.0%	7.7%
Bridgeport	5.5%	2.5%	3.3%	2.3%	12.3%	5.2%	5.7%	5.9%	1.3%	5.3%	8.9%	4.8%	3.3%
Coleville/Walker/Topaz	5.1%	6.8%	8.4%	0.6%	3.7%	2.3%	6.6%	8.8%	0.5%	4.5%	7.7%	0.0%	0.6%
Lee Vining	4.6%	2.6%	2.0%	12.8%	2.7%	3.6%	7.5%	3.3%	5.3%	0.7%	4.0%	1.1%	4.0%
Convict Lake	2.9%	1.3%	6.2%	0.5%	2.0%	5.2%	1.5%	0.0%	3.9%	13.4%	1.1%	4.7%	14.2%
Twin Lakes-Bridgeport	2.8%	4.1%	1.3%	4.0%	2.8%	2.3%	5.4%	0.7%	4.2%	7.4%	2.1%	5.2%	4.8%
Bodie	2.5%	0.0%	7.7%	0.0%	0.0%	3.9%	0.9%	1.5%	0.5%	0.0%	1.3%	2.7%	0.4%
None/None of these	3.8%	2.6%	4.2%	7.4%	1.4%	4.4%	1.0%	5.9%	7.4%	2.8%	1.6%	1.6%	2.7%

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

- Overall 43% (21%) of visitors went to Mono Lake, 36% (47%) to Mammoth Lakes town, 28% (26%) to the June Lake area and 21% (18%) to Bodie, the top four (primary + secondary) places visited in Mono County.
- Again, areas visited vary by season especially as some are not open year-round.

Table 33a – Mono County Sites/Places
(primary + secondary >5%)

	Total Visitor	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, 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%

VISITORS GO TO A RANGE OF MONO CO. SITES; VARIES BY PLACE VISITED

- Other areas/sites visited by site are shown below

**Table 33b – Mono County Sites/Places
(>5%)**

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake	Mam. Mtn.	Mam.-Lakes Basin	Bridgeport	Coleville / Walker/ Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
Mono Lake	43.2%	100.0%	41.4%	47.7%	26.9%	30.5%	36.2%	17.6%	57.9%	44.7%	35.3%	64.5%
Mammoth Lakes Town	36.4%	34.9%	100.0%	43.8%	55.0%	64.0%	25.5%	8.5%	46.0%	64.2%	21.9%	23.2%
June Lakes area	27.9%	30.8%	33.5%	100.0%	34.1%	41.6%	36.2%	6.7%	42.3%	52.0%	52.8%	20.4%
Bodie	20.9%	31.2%	13.3%	15.3%	11.9%	16.6%	21.5%	19.7%	15.7%	8.6%	17.4%	100.0%
Mammoth Lakes Basin/x-c ski area	16.0%	11.3%	28.1%	23.9%	26.0%	100.0%	8.1%	3.8%	18.0%	25.3%	5.8%	12.8%
Convict Lake	15.7%	16.2%	27.7%	29.3%	18.4%	24.8%	9.1%	1.3%	24.9%	100.0%	9.9%	6.4%
Lee Vining	14.7%	19.8%	18.6%	22.4%	12.3%	16.6%	16.2%	2.8%	100.0%	23.4%	13.2%	11.1%
Bridgeport	13.6%	11.4%	9.5%	17.7%	6.8%	6.9%	100.0%	25.6%	15.0%	7.9%	43.4%	14.0%
Twin Lakes-Bridgeport	10.5%	8.6%	6.3%	20.0%	3.0%	3.8%	33.6%	7.1%	9.5%	6.6%	100.0%	8.8%
Mammoth Mountain	10.4%	6.5%	15.6%	12.7%	100.0%	16.8%	5.1%	3.4%	8.6%	12.1%	2.9%	5.9%
Rock Creek/Tom's Place	9.6%	8.3%	16.6%	18.0%	10.3%	11.0%	8.3%	2.8%	17.0%	37.8%	10.0%	3.4%
Just passing through	9.0%	7.6%	7.1%	2.0%	4.2%	3.2%	7.7%	4.1%	13.4%	8.3%	3.1%	2.7%
Coleville/Walker/Topaz	8.7%	3.5%	2.0%	2.1%	2.8%	2.1%	16.3%	100.0%	1.7%	0.7%	5.9%	8.2%
Lundy Lake	7.9%	9.0%	9.9%	22.7%	1.7%	6.2%	19.2%	4.2%	13.2%	12.2%	39.3%	2.0%
Crowley Lake/McGee Creek	7.6%	7.4%	9.6%	12.1%	6.9%	10.8%	8.7%	0.5%	11.3%	28.0%	9.8%	3.2%
Virginia Lakes	6.5%	6.5%	6.1%	17.3%	2.8%	5.9%	19.6%	4.7%	10.3%	9.6%	39.7%	5.5%

A THIRD AWARE & HALF USED MONO COUNTY SPECIFIC TOURISM INFORMATION

Visitors indicated their awareness and usage of Mono County specific tourism information resources, as discussed below and shown on the next slides.

Awareness

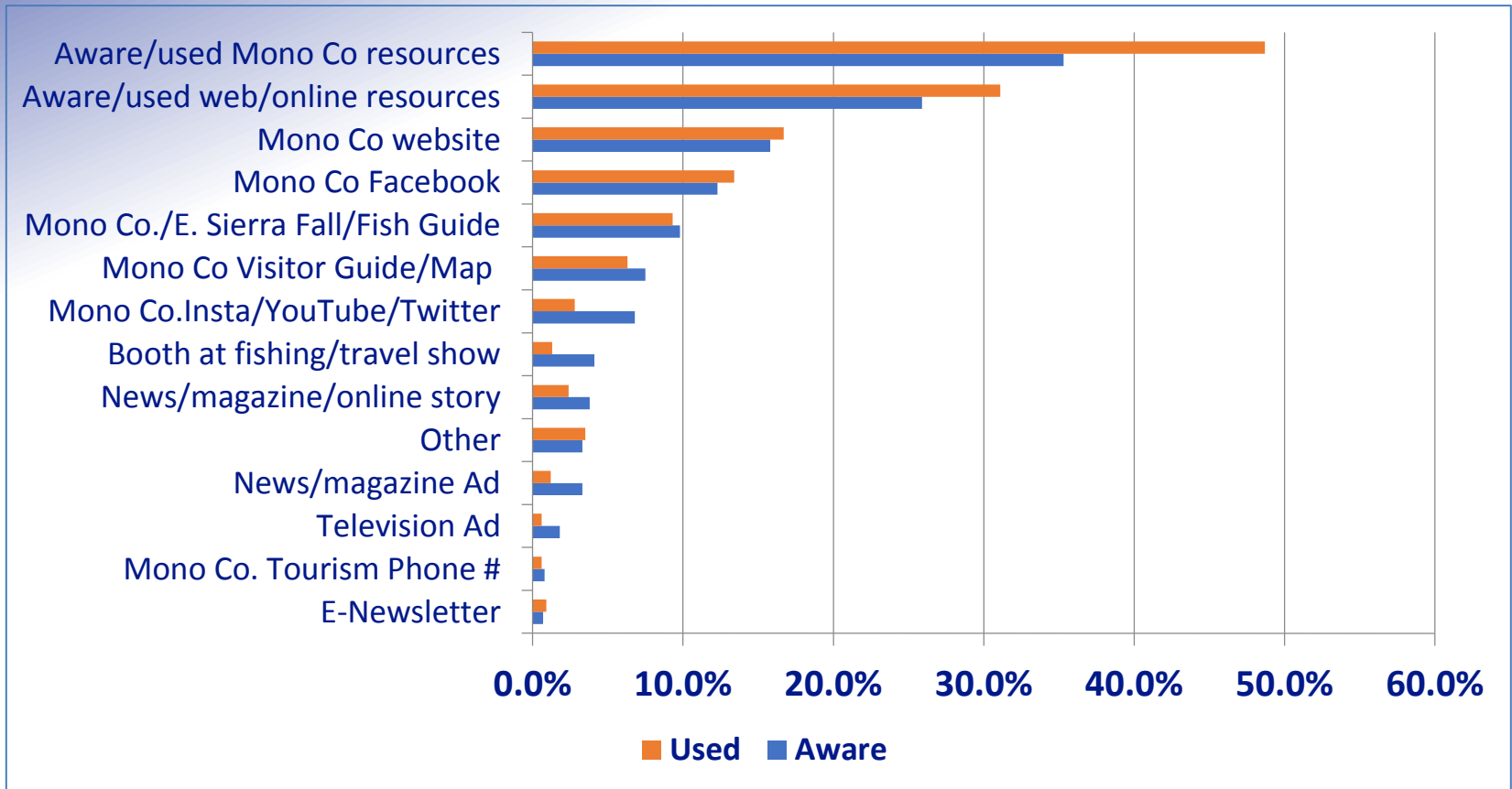
- Overall 35% of visitors indicated awareness of any Mono County tourism resources; 16% were aware of the MonoCounty.org website, 12% of Mono County Facebook and 10% of the Eastern Sierra Color and Fishing Guide, the top three.
- Resource awareness varied by season, residence, activity and lodging as shown in Table 34.

Usage

- Overall 49% of visitors who were aware of Mono County specific information resources to plan this trip used any of them. Of those aware, 17% used Mono County.org, 13% used Mono County Facebook and 9% of the Eastern Sierra Color and Fishing Guide, the top three and the same top resources used as awareness.
- Resource usage varied by season, residence, activity and lodging, shown in Table 35.

A THIRD AWARE OF AND HALF USE MONO COUNTY INFO RESOURCES

Exhibit 4 – Awareness and Use * of Mono Co. Tourism Information Resources



* “Use” represents share of those “Aware” (not total visitors)

35% AWARE OF MONO COUNTY TOURISM INFORMATION RESOURCES

Table 34 – Awareness of Mono County Tourism Resources

	Total Visitor	Residence			Purposes (all)	Activities		MC Lodging		
		CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base:	1032	524	273	235	553	298	199	410	195	169
Mono County.org Tourism website	15.8%	22.3%	12.8%	6.6%	16.0%	16.2%	20.3%	21.3%	10.4%	20.2%
Mono County Facebook	12.3%	15.9%	13.8%	3.7%	14.5%	13.8%	20.4%	15.3%	16.4%	15.0%
Mono County/Eastern Sierra Fall Color Guide, Fishing Guide	9.8%	13.9%	11.0%	0.6%	11.2%	15.8%	14.9%	10.9%	12.6%	13.6%
Mono County Visitor Guide or Map Guide	7.5%	10.3%	7.8%	1.6%	8.7%	9.7%	11.2%	6.7%	7.8%	10.9%
Mono Co. Instagram, YouTube, Twitter	6.8%	11.4%	4.1%	1.0%	8.4%	8.4%	12.7%	5.0%	11.2%	7.5%
Mono County booth at fishing or travel trade show	4.1%	6.6%	3.6%	0.0%	6.2%	3.1%	12.9%	6.4%	5.5%	3.3%
Story in newspaper or magazine or online	3.8%	5.3%	4.4%	0.0%	5.2%	6.3%	4.1%	1.6%	4.4%	5.4%
Advertising in newspaper or magazine	3.3%	4.7%	3.8%	0.0%	5.9%	7.1%	4.8%	0.9%	6.6%	6.3%
Television Advertising	1.8%	1.2%	4.6%	0.0%	2.3%	1.7%	3.1%	1.4%	2.2%	1.7%
Mono County Tourism Phone #	0.8%	1.6%	0.2%	0.0%	1.3%	2.0%	3.1%	0.7%	2.5%	1.5%
E-Newsletter	0.7%	1.3%	0.5%	0.0%	1.4%	2.1%	1.8%	1.0%	1.5%	0.0%
Other	3.3%	3.7%	5.4%	0.2%	4.6%	3.5%	5.4%	1.7%	2.9%	5.0%
<i>Unaware</i> of Mono Co. tourism resources	64.7%	52.1%	65.2%	88.8%	60.7%	62.7%	52.1%	60.2%	59.6%	58.2%
Aware of web/online resources:	25.9%	35.5%	23.7%	9.7%	27.6%	27.8%	36.9%	32.6%	27.8%	29.9%

HALF OF THOSE AWARE USED MONO COUNTY TOURISM INFO RESOURCES

Table 35 – Mono County Tourism Resources Used

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Activities		MC Lodging		
						CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base: Aware of MC resources	394	85	94	66	149	259	98	37	115	100	156	74	75
Mono County.org tourism website	16.7%	6.3%	7.7%	17.6%	30.6%	12.8%	16.3%	50.3%	16.8%	16.3%	30.5%	8.5%	24.3%
Mono County Facebook	13.4%	8.8%	12.4%	6.0%	20.5%	13.9%	9.3%	23.5%	12.7%	18.5%	19.3%	18.6%	16.1%
Mono County/Eastern Sierra Fall Color Guide, Fishing Guide	9.3%	0.0%	2.0%	4.8%	23.7%	10.6%	7.7%	4.0%	13.1%	9.2%	11.4%	11.2%	7.8%
Mono County Visitor Guide or Map Guide	6.3%	3.8%	9.1%	11.0%	3.0%	6.4%	5.0%	9.9%	7.8%	9.5%	6.2%	9.8%	10.6%
Mono County Instagram, YouTube, Twitter	2.8%	5.4%	0.6%	3.1%	3.0%	3.8%	0.0%	4.0%	5.5%	3.6%	1.7%	8.5%	2.8%
Story in newspaper or magazine or online	2.4%	8.6%	0.6%	3.2%	0.0%	3.1%	1.4%	0.0%	2.5%	0.8%	1.2%	3.4%	0.9%
Mono County booth at fishing or travel trade show	1.3%	0.0%	0.0%	0.0%	3.7%	1.5%	1.1%	0.0%	1.0%	5.0%	4.1%	0.0%	0.0%
Advertising in newspaper or magazine	1.2%	4.1%	0.0%	1.6%	0.4%	1.6%	0.4%	0.0%	2.5%	0.6%	0.4%	5.1%	0.0%
E-Newsletter	0.9%	0.0%	0.0%	4.8%	0.4%	1.4%	0.0%	0.0%	3.0%	0.6%	2.5%	0.0%	0.0%
Mono County Tourism Phone #	0.6%	2.2%	0.4%	0.0%	0.0%	0.9%	0.0%	0.0%	0.8%	0.6%	0.0%	2.0%	0.9%
Television Advertising	0.6%	2.9%	0.0%	0.0%	0.0%	0.3%	1.4%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Other	3.5%	3.1%	2.9%	8.0%	2.1%	2.4%	2.3%	16.2%	3.8%	3.1%	5.8%	3.7%	3.7%
Did not use Mono Co. resources	51.3%	65.5%	68.1%	55.0%	25.8%	52.1%	60.7%	12.2%	47.6%	46.4%	30.1%	50.2%	41.3%
Used web/online resources:	31.1%	16.8%	19.3%	29.9%	50.9%	27.9%	25.4%	77.8%	32.6%	33.9%	51.9%	30.2%	37.6%

8 IN 10 USED RESOURCES TO PLAN THIS TRIP TO MONO COUNTY

- Overall 82% (86%) of Mono Lakes visitors used resources for planning this trip.
- Of those who did, 39% used any/all on-line resources, 30% (43%) used past experience here, 24% (26%) used a travel website, 17% (32%) had a friend/family referral, and 12% (n/a) used social media. As well, 6% used Mono County specific resources.

Table 36 – General Resources Used to Plan This Trip

	Total Visitor	Winter	Spring	Summer	Fall	Residence			MC Lodging		
						CA	Other U.S.	Int'l	Hot/Mot/Inn	Other paid	Camping
Base:	1032	224	268	213	327	524	273	235	410	195	169
Own experience/been here before	29.8%	34.1%	34.8%	28.9%	22.2%	44.5%	27.5%	3.8%	13.4%	36.9%	47.8%
Any travel website e.g. Yelp, Trip Advisor, Booking.com, Hotels.com, Expedia, etc.	23.5%	6.4%	17.7%	33.3%	33.2%	8.9%	16.6%	59.8%	45.5%	12.3%	18.6%
Family member or friend	17.4%	17.1%	15.2%	18.6%	19.3%	17.6%	24.9%	8.5%	11.3%	29.5%	15.7%
Any social media platform (Facebook, Instagram, etc.)	12.1%	6.4%	5.2%	14.8%	21.4%	7.8%	9.3%	23.8%	17.6%	14.0%	9.2%
Travel Agent	6.5%	1.5%	13.9%	3.4%	3.7%	0.4%	1.0%	24.9%	13.3%	0.7%	1.0%
Visit California - website, social media, guide, etc.	5.8%	2.2%	5.1%	13.3%	3.1%	3.6%	7.8%	7.6%	4.9%	8.5%	9.6%
Website or contact with Mono County business, venue, attraction, or destination	5.8%	8.2%	3.9%	11.0%	2.4%	5.1%	3.8%	9.3%	3.2%	10.1%	6.3%
Hotel or lodging	4.9%	3.3%	3.0%	6.3%	7.1%	4.5%	6.3%	4.3%	10.3%	7.5%	4.6%
Newspaper/magazine/online ad or story	4.8%	8.6%	1.3%	7.2%	4.5%	4.2%	5.6%	5.0%	2.2%	7.3%	4.4%
Website or contact with air or transportation company	3.9%	6.2%	1.5%	8.1%	1.8%	3.7%	4.4%	3.6%	2.0%	4.2%	8.8%
Mono County Tourism	3.3%	2.3%	2.4%	0.9%	6.9%	4.8%	2.2%	1.8%	4.0%	8.3%	6.1%
Mammoth Lakes Tourism or Mammoth/June Mtn. Website, Guides, Facebook, YouTube, etc.	3.3%	7.1%	1.9%	3.6%	2.2%	4.7%	2.4%	1.6%	3.5%	9.4%	4.0%
None	17.5%	26.5%	18.4%	7.1%	18.5%	20.1%	24.9%	3.7%	15.0%	11.8%	10.6%
Used online sources:	38.7%	27.2%	27.4%	56.2%	45.5%	25.4%	29.3%	75.4%	56.1%	39.8%	38.8%

OVER 9 IN 10 VISITORS DROVE TO ARRIVE IN MONO COUNTY

- Overall 94% of visitors drove to Mono County, of which 61% used a personal vehicle and 27% drove a rental, while another 6% drove a recreational vehicle.
- Of note 79% of International travelers rented a vehicle suggesting they arrived elsewhere by plane then rented a car to move around on their trip.

Table 37 – Transportation to Arrive in Mono County

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purpose	MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hot/Mot/ Inn	Other paid	Camp- ing
Base:	1032	224	268	213	327	524	273	235	553	410	195	169
Personal vehicle	61.4%	78.9%	54.9%	56.2%	61.7%	84.2%	68.0%	9.4%	79.7%	49.6%	81.3%	63.7%
Rental vehicle	26.5%	10.8%	29.6%	33.3%	27.7%	4.1%	18.3%	79.7%	8.9%	43.3%	13.8%	8.3%
RV/recreational vehicle	5.5%	6.7%	4.0%	8.7%	3.9%	4.0%	7.6%	5.9%	8.4%	0.0%	1.8%	25.1%
Tour coach or bus	2.5%	0.0%	5.7%	0.0%	2.4%	4.7%	0.0%	1.2%	0.3%	1.1%	1.4%	2.3%
Motorcycle	2.2%	0.1%	3.2%	0.2%	3.7%	1.9%	3.9%	0.6%	0.4%	4.5%	0.0%	0.0%
Commercial airline	1.4%	2.5%	2.6%	0.3%	0.1%	0.7%	2.1%	1.9%	1.5%	1.0%	1.6%	0.0%
Public transit	0.2%	0.0%	0.0%	0.3%	0.5%	0.0%	0.3%	0.5%	0.5%	0.0%	0.0%	0.6%
Yosemite Area Regional Transportation (YARTS)	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
Other	0.4%	0.9%	0.0%	1.0%	0.0%	0.5%	0.0%	0.6%	0.3%	0.5%	0.1%	0.0%

OVER 9 IN 10 DROVE TO GET AROUND MONO COUNTY

- Once in Mono County 95% (96%) drove to get around the area, of which 62% (76%) used a personal vehicle, 27% (15%) used a rental and 6% (5%) used a recreational vehicle.

Table 38 – Transportation to Get Around Mono County

	Total Visitor	Winter	Spring	Summer	Fall	Residence			MC Lodging		
						CA	Other U.S.	Int'l	Hot/Mot/Inn	Other paid	Camping
Base:	1032	224	268	213	327	524	273	235	410	195	169
Personal car/truck/van/SUV	61.5%	75.5%	55.6%	57.1%	62.9%	85.6%	65.6%	10.0%	47.9%	81.8%	69.7%
Rental car/truck/van/SUV	27.3%	11.2%	31.0%	34.3%	28.1%	4.3%	19.9%	80.8%	43.7%	13.1%	10.6%
Free Mammoth Lakes Trolley/ESTA Bus Service	6.0%	16.0%	1.6%	8.1%	3.1%	8.4%	5.0%	2.4%	3.5%	18.1%	9.2%
RV/Recreational vehicle	5.9%	8.5%	3.4%	8.0%	5.4%	2.6%	8.7%	9.1%	0.0%	1.8%	20.9%
Walking	3.6%	4.4%	0.8%	7.4%	3.5%	4.5%	3.3%	2.4%	0.7%	8.1%	8.1%
Motorcycle	2.7%	0.1%	3.6%	0.6%	4.8%	2.9%	4.1%	0.6%	5.0%	0.0%	0.6%
Organized Tour van or bus	2.5%	0.0%	5.7%	0.0%	2.4%	4.7%	0.0%	1.2%	1.1%	1.4%	2.3%
Yosemite Area Regional Transportation (YARTS)	1.5%	0.0%	3.6%	0.0%	1.2%	0.0%	0.0%	6.1%	1.6%	0.0%	0.0%
Bicycle	1.0%	1.1%	0.9%	2.1%	0.2%	1.1%	1.5%	0.2%	0.4%	1.9%	2.9%
Off-road Vehicle	0.6%	0.0%	1.0%	0.1%	1.1%	0.6%	1.3%	0.0%	1.0%	0.0%	0.8%
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%	0.2%	0.8%	2.3%
Other	0.8%	1.1%	0.0%	1.9%	0.6%	1.0%	0.8%	0.4%	2.0%	0.1%	0.2%

6 IN 10 VISITORS STAYED OVERNIGHT IN MONO CO.

- 92% of Mono visitors stayed overnight anywhere on this trip, and were away 5.2 (4.8) nights.
- 62% (64%) stayed overnight in Mono County, thus 38% (36%) were day visitors here.
- On average *all* Mono County visitors stayed here 1.2 (2.5) nights.
- Overnight Mono County visitors stayed here 2.4 (3.8) nights, nearly half of their overall trip.
 - Overnight Californians stayed longest 3.2 (4.1)nights, versus 2.3 (3.6) nights for Other U.S. and 1.4 (3.8) nights by International visitors.

Table 39a – 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%
All 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

NIGHTS IN MONO COUNTY BY PLACES VISITED

- Among *all* Mono County visitors, Mammoth Mountain specific visitors spent the most nights (median) 2.99, with 2.76 nights by Mammoth Lakes visitors and 2.73 by Convict Lake visitors.
- Among Mono County *overnight* visitors, Convict Lake visitors spent the most nights 3.47, and June Lake visitors spent 3.25 nights.

Table 39b - Nights in Mono County by Places Visited

Median nights in each location	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake are	Mam. Mtn.	Mam.-Lakes Basin	Bridge port	Coleville / Walker/ Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
Total	5.21	7.20	5.16	4.73	4.23	5.76	4.26	8.38	5.46	5.08	3.24	13.09
Nights in all other locations/destinations	2.60	6.11	1.66	0.34	0.28	0.46	0.47	3.29	2.35	0.37	0.24	10.45
Nights in Mono County	1.22	0.94	2.11	2.53	2.99	2.76	1.67	0.93	1.37	2.73	2.19	1.18
Base: Overnight visitors	920	371	419	327	181	188	153	83	155	153	127	209
Total	5.18	10.24	5.29	4.74	4.27	6.00	4.32	4.35	6.34	4.71	3.92	14.58
Nights in Mono County	2.37	2.02	2.98	3.25	3.01	3.18	2.25	1.81	2.73	3.47	2.49	1.63
Nights in all other locations/destinations	0.45	6.40	0.39	0.26	0.29	0.36	0.39	0.49	1.39	0.19	0.26	13.41

4 IN 10 OVERNIGHT VISITORS USED HOTELS

- Of the 62% (64%) who were overnight visitors, 43% stayed in hotel/motel lodging, 26% used other paid lodging (mainly rental condos), 20% camped while 12% used private unpaid lodging.
 - 76% of overnight International visitors used hotel lodging.
- Of Winter visitors, 45% used other paid lodging versus 15% in hotels, while 61% in Fall used hotels.

Table 40a - 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%

OVERNIGHT INCIDENCE & LODGING TYPE BY SITES VISITED

- As shown overnight visitation and lodging type varied by where visitors went in the county.

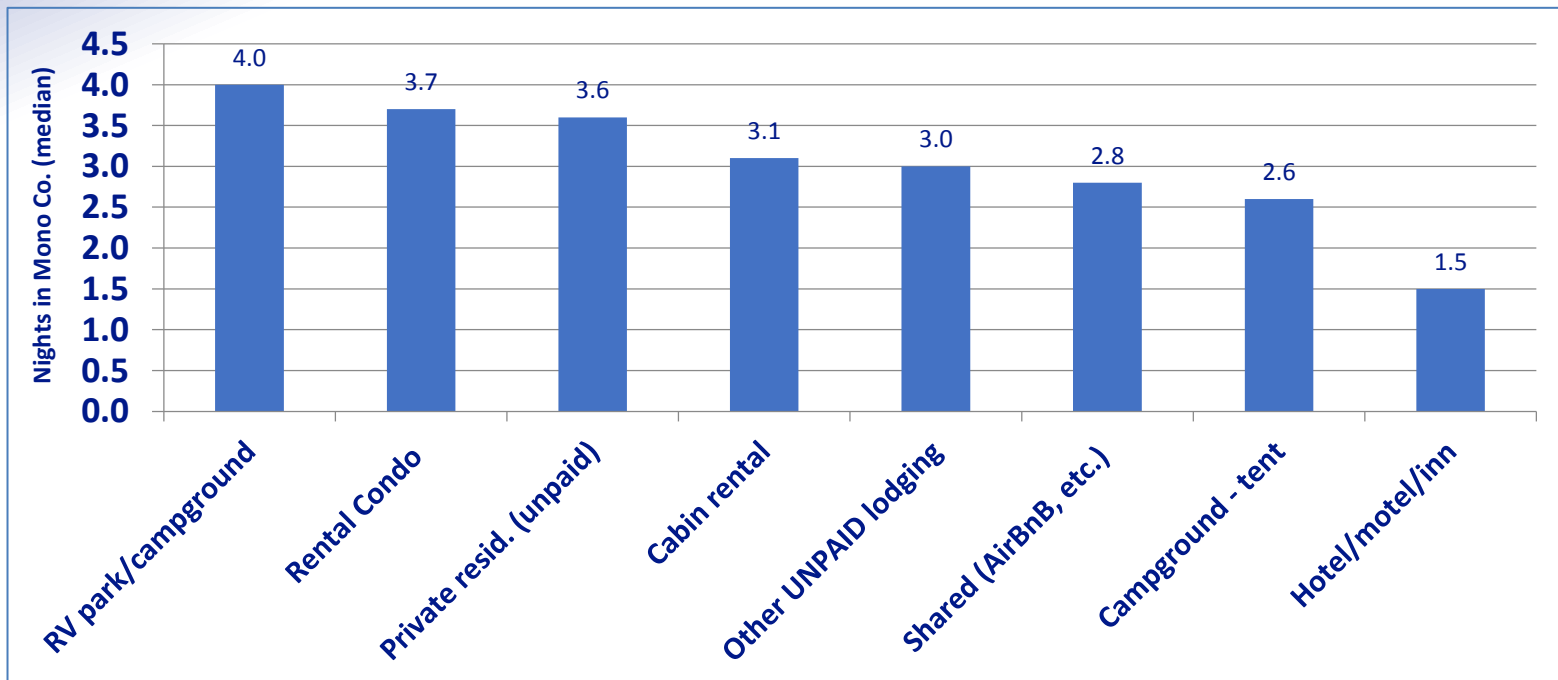
Table 40b – Lodging by Mono County Site Visited

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake are	Mam. Mtn.	Mam.-Lakes Basin	Bridgeport	Coleville / Walker/ Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
% staying overnight in...												
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
Total	92.3%	94.2%	94.5%	93.3%	98.7%	98.3%	91.2%	87.7%	94.6%	94.9%	87.4%	93.6%
Mono County	62.0%	59.1%	73.0%	80.0%	98.7%	85.9%	76.6%	60.1%	66.6%	72.9%	83.6%	72.7%
All other locations/destinations	59.7%	74.0%	53.3%	40.4%	36.2%	48.1%	48.3%	57.3%	64.1%	42.4%	32.6%	76.6%
Not staying overnight	7.7%	5.8%	5.5%	6.7%	1.3%	1.7%	8.8%	12.3%	5.4%	5.1%	12.6%	6.4%
Base: Mono County overnight visitor	920	371	419	327	181	188	153	83	155	153	127	209
Hotel or motel or inn	43.2%	56.4%	31.1%	35.2%	27.5%	28.1%	57.6%	86.5%	36.7%	19.1%	50.2%	69.2%
Other paid overnight lodging	25.6%	16.5%	29.3%	30.1%	42.3%	39.7%	16.9%	0.4%	28.4%	36.1%	26.2%	13.7%
Camping	19.5%	19.0%	24.1%	23.2%	9.3%	19.3%	17.2%	7.6%	21.6%	33.3%	15.3%	12.1%
Private Home or other unpaid	11.6%	8.1%	15.5%	11.5%	20.9%	12.9%	8.3%	5.5%	13.4%	11.5%	8.3%	5.0%

2.4 MEDIAN NIGHTS IN MONO COUNTY BY OVERNIGHT VISITORS

- Visitors spent the most 4.0 (5.6) nights on average in RV campgrounds and 3.7 (6.7) nights in condos/other paid lodging, but only 1.5 (2.8) nights in hotels.

Exhibit 5 – Nights in Mono County Lodging by Type



6 IN 10 LODGING GUESTS RESERVED ON THE INTERNET

- Among overnight visitors who stayed in paid lodging 31% (26%) made their reservation on the lodging website, and 29% (1%) used a travel website.
- Of note, 20% (24%) walked in with no advance reservation (mainly among campers).

Table 41 – Means of Lodging Reservation

	Total Visitor	Residence			Purposes (all)	Activities		MC Lodging		
		CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/ Inn	Other paid	Camp- ing
Base: Staying in paid lodging	774	374	192	208	420	228	165	410	195	169
On the lodging's website	30.6%	38.2%	26.7%	19.6%	39.2%	35.7%	43.3%	24.4%	40.5%	31.3%
Travel website/booking site: Booking.com, Hotels.com, Travelocity, etc.	28.8%	15.2%	27.1%	55.2%	17.3%	18.6%	15.1%	44.0%	20.1%	6.5%
Walk-in/no reservation	19.5%	17.2%	29.1%	15.9%	14.8%	19.4%	11.5%	17.2%	0.5%	49.3%
Direct call or email to property or chain	12.3%	14.1%	17.9%	4.5%	15.4%	14.0%	18.7%	13.8%	10.3%	11.7%
Rental agency	4.6%	8.3%	0.5%	1.2%	7.9%	6.0%	8.1%	0.1%	15.9%	0.0%
Local area friend or relative reserved it	2.3%	3.1%	3.1%	0.0%	3.6%	3.7%	2.7%	0.1%	7.4%	0.4%
Through a travel agent	1.7%	1.6%	0.0%	3.2%	1.5%	1.3%	0.0%	2.0%	2.2%	0.4%
Through my/our tour arranger or operator	0.5%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%
My company booked it	0.3%	0.3%	0.6%	0.0%	0.2%	0.1%	0.0%	0.6%	0.0%	0.0%
Other	2.4%	3.5%	1.5%	1.2%	2.7%	3.3%	3.4%	0.7%	4.4%	3.6%

NEARLY 6 WEEKS ADVANCE BOOKING PERIOD

- For paid lodging guests booking in advance the average period was 5.6 (7.5) weeks before the trip.
- Reservations were made farther in advance in Spring and Summer, each at about 6.5 weeks.
- Also while hotel guests booked about 5 (4) weeks out, other paid lodging guests booked 6.5 (7) weeks ahead.

Table 42 – Advance Reservation Period

	Total Visitor	Season				Annual Total					
		Winter	Spring	Summer	Fall	Residence			MC Lodging		
						CA	Other U.S.	Int'l	Hot/Mot/Inn	Other paid	Camping
Base: advance booked	614	134	165	133	182	305	136	173	338	193	82
1 week	5.2%	8.0%	1.2%	5.7%	7.2%	4.7%	8.6%	3.8%	5.6%	3.7%	7.6%
2 weeks	7.8%	4.3%	8.7%	1.2%	14.5%	7.2%	9.6%	7.6%	12.0%	2.3%	6.5%
3-4 weeks	17.7%	19.6%	12.1%	7.7%	31.1%	17.8%	22.7%	14.4%	24.2%	11.3%	10.5%
5-8 weeks	55.2%	57.8%	57.1%	68.8%	40.0%	50.4%	52.5%	65.5%	52.0%	65.7%	40.4%
9-12 weeks	14.1%	10.3%	20.9%	16.6%	7.3%	19.9%	6.5%	8.6%	6.2%	16.9%	34.9%
Median # of weeks:	5.62	5.35	6.40	6.60	4.29	5.86	4.82	6.12	4.92	6.55	6.51

9 IN 10 VISITORS SPENT MONEY IN MONO COUNTY

- Overall 94% (98%) of visitor groups spent money in Mono County the day interviewed.
- By category, 75% (78%) spent for meals out and 47% (56%) for beverages/drinks, while 34% (45%) spent for groceries/supplies and 32% (64%) for paid lodging.
- Spending incidence is highest in Winter and Fall, both at 97% (99%), by those from Other U.S. areas at 98% (96%) and by other paid lodging guests at 99% (99%).

Table 43a – Spending Incidence by Visitor Groups (in Mono County)

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all)	Activities		MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	169
Meals out/snacks/dining	74.6%	81.0%	68.2%	72.1%	79.7%	69.8%	75.8%	82.5%	72.4%	69.1%	70.5%	93.8%	80.4%	53.0%
Drinks/beverages	47.3%	62.0%	34.2%	55.6%	46.6%	52.3%	40.0%	46.0%	57.9%	51.6%	57.5%	60.2%	63.9%	41.3%
Groceries/supplies/incidentals	34.2%	27.8%	29.7%	32.0%	45.0%	34.4%	32.6%	35.6%	37.2%	36.4%	39.4%	38.4%	51.0%	34.2%
PAID lodging	31.6%	16.2%	27.0%	29.6%	48.0%	27.7%	25.3%	46.3%	30.9%	30.0%	38.8%	79.4%	42.8%	26.5%
Local Transportation (gas, car rental, parking, etc.)	25.5%	13.2%	25.2%	28.4%	31.5%	21.0%	29.5%	29.8%	22.2%	25.6%	16.4%	34.2%	19.8%	17.5%
Shopping/Gifts/Souvenirs	23.4%	29.6%	26.2%	23.2%	16.6%	19.4%	28.4%	25.7%	23.5%	26.3%	14.8%	18.2%	36.4%	17.3%
Admissions/fees for recreation or sights (passes, guides, etc.)	22.4%	14.4%	22.0%	29.6%	22.4%	17.3%	14.5%	41.4%	17.2%	17.4%	10.8%	42.7%	22.3%	20.9%
Recreation gear or equipment rental or purchase	7.0%	9.5%	7.7%	6.7%	4.9%	12.1%	2.8%	1.9%	16.3%	16.1%	22.8%	5.0%	26.9%	4.4%
Not spending in Mono County	5.5%	2.6%	10.0%	4.7%	2.9%	7.7%	1.9%	5.3%	5.9%	7.0%	8.2%	1.2%	1.0%	17.1%

9 IN 10 VISITORS SPENT MONEY IN MONO COUNTY

- Spending incidence is highest for Twin Lakes visitors at 100%), Coleville/Walker/Topaz visitors at 98% and Bodie visitors also at 98%.

Table 43b – Spending Incidence by Visitor Groups (in Mono County) by Sites Visited

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake are	Mam. Mtn.	Mam.-Lakes Basin	Bridgport	Coleville / Walker/ Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
Meals out/snacks/dining	74.6%	78.9%	75.4%	80.7%	81.5%	78.4%	84.9%	85.6%	79.0%	75.4%	88.5%	82.5%
Drinks/beverages	47.3%	41.1%	53.9%	57.5%	75.3%	45.4%	57.1%	50.9%	58.4%	57.2%	52.5%	55.8%
Groceries/personal supplies or incidentals	34.2%	30.2%	33.7%	45.1%	43.5%	46.6%	48.1%	62.8%	25.5%	31.8%	54.9%	34.0%
PAID lodging	31.6%	33.8%	23.5%	36.3%	27.5%	32.7%	58.8%	52.1%	27.9%	26.8%	65.1%	56.9%
Local area Transportation	25.5%	27.1%	27.0%	18.9%	18.4%	32.7%	30.3%	36.0%	17.4%	17.9%	20.8%	26.5%
Shopping/Gifts/Souvenirs	23.4%	29.0%	30.7%	19.5%	31.3%	27.9%	15.9%	7.7%	31.8%	26.2%	15.1%	26.0%
Admissions or fees for recreation venues or attractions (including ski/trail passes, guides, etc.)	22.4%	29.4%	12.9%	18.0%	36.8%	19.3%	27.9%	18.4%	18.8%	7.4%	24.3%	63.6%
Recreation gear or equipment rental or purchase	7.0%	3.6%	7.7%	10.1%	15.0%	13.8%	9.8%	4.6%	8.8%	14.3%	11.0%	3.3%
Not spending money in Mono Co. today	5.5%	7.0%	5.4%	4.5%	3.3%	2.8%	2.5%	1.6%	4.8%	7.1%	0.0%	1.9%

VISITORS GROUPS SPENT NEARLY \$300 DAILY IN MONO COUNTY

- Overall visitor groups spent an average of \$279 (\$200) per day in Mono County.
- They paid most for paid lodging at \$108 (\$67) and meals out at \$64 \$(34) per day.
- Daily spending was highest in both Winter at \$310 (\$552) and Fall at \$304 (\$139) per group.
- By residence International visitors spent \$325 (\$201) per day.
- By lodging other paid lodging groups spent \$646 \$(366) per day and hotel guests spent \$508 (\$284).

Table 44a – Visitor Group Mean Daily Spending in Mono County

Mean Spending per Visitor Group	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all)	Activities		MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	169
Total (\$)	278.39	309.61	219.33	292.16	304.44	296.97	220.29	325.09	358.25	300.61	332.43	507.75	645.87	197.14
PAID lodging	108.59	93.65	81.83	125.22	137.33	106.77	80.59	155.24	134.25	118.88	140.93	272.51	276.95	50.07
Meals out/snacks/dining	64.20	56.26	55.27	73.41	73.88	69.66	49.77	73.90	73.25	62.84	88.26	107.37	111.15	58.75
Admissions/fees for recreation venues or sights (ski/trail passes, guides, etc.)	26.79	79.44	14.35	7.87	8.77	38.15	14.87	19.43	54.44	29.66	7.85	31.00	95.03	12.98
Groceries/supplies/incidentals	20.84	18.23	13.82	20.67	30.17	23.04	21.53	14.88	25.70	25.73	25.93	21.79	46.05	26.61
Drinks/beverages	19.61	20.09	15.87	23.94	20.30	24.25	13.82	18.01	26.82	21.91	33.20	31.44	44.70	15.49
Local area Transportation (gas, car rental, parking, etc.)	16.80	6.92	17.79	22.43	20.25	12.26	18.60	24.25	13.00	14.41	11.01	19.18	13.81	14.53
Shopping/Gifts/Souvenirs	16.19	25.31	16.52	13.25	10.35	15.13	17.44	16.67	18.25	15.49	12.71	20.46	37.92	10.41
Recreation gear or equipment rental or purchase	5.37	9.72	3.88	5.38	3.37	7.71	3.66	2.72	12.56	11.70	12.54	4.02	20.26	8.30

VISITORS GROUPS SPENT NEARLY \$300 DAILY IN MONO COUNTY

- By places visited, highest daily group spending was by Mammoth Mountain visitors at \$527, and \$411 by Convict Lake visitors.

Table 44b – Visitor Group Mean Daily Spending in Mono County

Mean Daily Spending per Visitor Group	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake are	Mam. Mtn.	Mam.-Lakes Basin	Bridgeport	Coleville / Walker/ Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
Total (\$)	278.39	272.74	300.74	340.18	526.97	381.87	340.86	293.56	254.85	280.61	411.12	355.03
PAID lodging	108.59	109.64	115.86	134.87	173.75	142.43	148.58	142.21	98.98	98.68	185.54	166.54
Meals out/snacks/dining	64.20	68.05	62.81	76.94	85.68	77.42	89.89	71.21	62.20	63.12	111.45	82.59
Admissions or fees for recreation venues or attractions (including ski/trail passes, guides, etc.)	26.79	17.78	34.34	29.47	146.62	45.82	12.94	7.52	13.03	27.33	13.67	21.59
Groceries/personal supplies or incidentals	20.84	18.98	22.78	34.21	28.96	35.56	28.38	22.65	17.73	23.69	38.93	20.54
Drinks/beverages	19.61	17.50	20.88	28.67	32.77	26.03	25.58	17.62	21.78	25.03	28.01	23.65
Local area Transportation	16.80	17.83	15.88	12.30	10.65	19.76	19.35	24.33	14.13	10.91	16.14	16.37
Shopping/Gifts/Souvenirs	16.19	20.43	20.52	16.48	32.22	24.64	13.81	5.77	20.68	21.29	13.95	19.32
Recreation gear or equipment rental or purchase	5.37	2.54	7.67	7.23	16.32	10.21	2.34	2.26	6.34	10.56	3.44	4.43

\$145 (\$76) MEDIAN PER-CAPITA DAILY SPENT - HIGHEST FOR HOTEL GUESTS

- The highest daily median \$229 (\$110) was spent by Hotel guests and \$212 (\$124) by Other paid lodgers.
- Winter spending was highest \$236 (\$193) about double other seasons.
- Californians spent \$149 (\$87) median versus \$141 (\$67) by Other U.S and \$135 (\$87) by International visitors.

Table 45 – 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% (87%) being extremely or very satisfied, while less than 1% were dissatisfied.
- Visitors rated their experience at 4.60 (4.66) (out of 5), very satisfied.
- Hikers and fishers each rated Mono County the highest, over 4.80.

Table 46 – 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

HIGHLY SATISFIED WITH AREA BEAUTY & ACTIVITIES

- Satisfaction * with Mono County was mainly due to the area’s scenic beauty (similar to the reasons for coming and choosing the area), cited by 85% (84%) and that it has the activities they wanted to do, by 55% (49%).
- These two main reasons are consistent across segments.

Table 47 – Reasons Why Satisfied

	Total Visitor	Winter	Spring	Summer	Fall	Residence			MC Lodging		
						CA	Other U.S.	Int'l	Hot/Mot/Inn	Other paid	Camping
Base: Satisfied with Mono County	1007	217	266	197	327	513	265	229	407	188	164
Scenic beauty/beautiful area	85.4%	79.5%	92.9%	76.7%	86.1%	89.2%	83.1%	80.3%	74.6%	82.9%	92.7%
Has the activities I/we want to do	55.1%	47.3%	49.9%	68.1%	57.0%	57.2%	49.5%	57.2%	64.4%	65.9%	65.7%
Many things to see and do	26.2%	21.1%	14.0%	43.1%	31.7%	23.9%	30.0%	26.5%	29.7%	26.6%	31.9%
Great weather	25.4%	24.5%	25.4%	33.3%	20.9%	31.1%	24.0%	15.5%	11.8%	40.1%	27.8%
Good for families/family-friendly	19.0%	23.7%	15.4%	30.4%	12.9%	28.2%	14.8%	5.2%	10.5%	44.2%	34.1%
Relaxing area & activities/	19.0%	17.5%	18.2%	25.4%	16.5%	23.7%	16.3%	12.5%	12.8%	32.9%	32.9%
Like/love the area/been here many times	18.7%	22.6%	9.7%	27.3%	21.2%	28.4%	16.2%	2.0%	11.7%	33.6%	23.0%
Friendly people	18.2%	31.6%	16.3%	21.5%	10.6%	19.1%	20.8%	13.6%	11.6%	32.9%	20.6%
good getaway area	16.1%	13.6%	15.8%	26.2%	11.4%	20.6%	16.1%	7.0%	10.1%	26.7%	24.4%
Clean air/good environment	14.2%	19.9%	15.2%	11.2%	11.6%	19.0%	11.5%	7.3%	8.3%	27.5%	27.8%
Dog friendly	11.0%	8.7%	8.7%	15.5%	11.8%	18.3%	7.3%	0.2%	8.4%	17.6%	22.6%

* too few respondents were dissatisfied to show their reasons

Characteristics/Demographics

- **Travel Group**
- **Household**

TRAVELERS MAINLY FAMILIES OR COUPLES; FEW IN A TOUR GROUP

- Overall 39% (37%) of visitors were traveling as a family, with 27% (27%) in couples and 16% (16%) friend groups.
 - This varied by season with 49% (52%) being families in Summer, as were 40% of hikers
- By season 34% (24%) of Winter visitors were couples the highest of any season.
- By activity, 22% of anglers were friends groups the highest of any segment.
- Just 4% (7%) said they were on an organized tour group.

Table 48a – Immediate Travel Group/Organized Tour Group

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all) Outd. Rec.	Activities		MC Lodging			
						CA	Other U.S.	Int'l		Hike	Fish	Hot/Mot /Inn	Other paid	Private/ Unpaid	Camp- ing
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	146	169
A family group	38.7%	39.3%	32.5%	48.8%	37.6%	37.7%	30.8%	49.5%	39.3%	40.0%	37.2%	37.6%	52.3%	22.5%	38.8%
A couple	27.2%	34.4%	26.8%	17.6%	30.3%	25.8%	29.7%	26.9%	21.4%	22.4%	17.7%	28.7%	14.2%	26.5%	25.3%
A group of friends or co-workers	15.9%	15.5%	19.2%	18.5%	10.5%	15.9%	21.2%	10.0%	21.1%	19.8%	21.7%	14.7%	15.6%	18.8%	16.7%
A mixed group of family and friends	12.3%	2.8%	15.5%	11.9%	14.8%	13.9%	10.0%	11.8%	12.0%	11.5%	18.1%	14.9%	14.9%	17.6%	13.2%
Alone	5.3%	8.0%	4.3%	3.0%	6.6%	5.4%	8.4%	1.6%	6.0%	6.2%	4.9%	3.6%	1.4%	14.2%	3.6%
Other	0.7%	0.1%	1.7%	0.2%	0.2%	1.3%	0.0%	0.3%	0.2%	0.2%	0.3%	0.5%	1.6%	0.3%	2.3%
If on an Organized Tour															
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	146	169
No	96.1%	96.8%	92.6%	100.0%	96.5%	93.4%	98.5%	98.5%	98.6%	99.2%	99.0%	96.9%	97.8%	98.8%	97.7%
Yes	3.9%	3.2%	7.4%	0.0%	3.5%	6.6%	1.5%	1.5%	1.4%	0.8%	1.0%	3.1%	2.2%	1.2%	2.3%

TRAVELERS MAINLY FAMILIES OR COUPLES;

- By place visited shows the highest share of families among Mammoth Lakes Basin visitors at 50% and 23% of Bridgeport visitors were mixed family/friends groups.

Table 48b – Immediate Travel Group by Site Visited

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake are	Mam. Mtn.	Mam.-Lakes Basin	Bridge port	Coleville/Walker/Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Base:	1032	421	449	344	182	194	165	94	171	166	131	221
A family group	38.7%	41.5%	42.0%	41.4%	47.9%	49.5%	25.2%	36.9%	33.6%	36.3%	38.7%	40.3%
A couple	27.2%	30.1%	26.0%	29.6%	21.8%	17.2%	32.4%	23.0%	35.0%	22.4%	22.4%	26.6%
A group of friends or co-workers	15.9%	14.9%	12.5%	8.7%	14.4%	15.2%	12.5%	9.7%	16.3%	18.6%	18.0%	13.8%
A mixed group of family and friends	12.3%	9.4%	11.6%	15.5%	8.4%	12.3%	23.4%	16.6%	9.6%	17.3%	16.4%	16.6%
Alone	5.3%	3.3%	7.0%	4.6%	7.5%	5.7%	6.0%	12.3%	5.1%	5.1%	4.4%	1.4%
Other	0.7%	0.7%	0.9%	0.2%	0.0%	0.1%	0.5%	1.5%	0.3%	0.3%	0.0%	1.4%

RESPONDENT MEDIAN AGE OF 46 (48 IN 2008)

- Most respondents were in their mid 40's with Other U.S. residents at 50 (52), and Fall visitors and anglers nearly 50 years of age.
- Overall 35% (26%) of Mono County visitors were in the 18 to 39 age group, essentially “millennials.”
- For campers and Summer visitors 41% were in this age group as were 39% of hikers and 38% (32%) of International visitors.

Table 49 – Respondent Age

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all)	Activities		MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camping
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	169
18-29	16.5%	17.5%	15.3%	19.1%	15.4%	15.3%	18.4%	16.8%	17.0%	19.8%	8.9%	14.4%	9.6%	21.7%
30-39	18.7%	16.6%	20.3%	21.6%	15.9%	20.0%	14.3%	21.2%	18.9%	19.2%	15.1%	19.5%	21.3%	19.6%
Net 18-39	35.2%	34.1%	35.6%	40.7%	31.3%	35.3%	32.7%	38.0%	35.9%	39.0%	24.0%	33.9%	30.9%	41.3%
40-49	23.9%	27.6%	21.6%	30.4%	19.3%	26.7%	15.6%	28.1%	24.6%	23.8%	28.5%	22.0%	28.9%	25.9%
50-59	21.6%	23.5%	17.0%	18.3%	28.0%	22.0%	19.3%	23.3%	23.5%	22.1%	23.9%	30.4%	26.1%	18.6%
60+	19.3%	14.8%	25.8%	10.3%	21.3%	16.0%	32.6%	10.4%	16.0%	15.1%	23.5%	13.4%	14.1%	14.2%
Median age	45.7	45.3	46.2	42.5	49.2	45.0	50.4	43.7	45.2	44.1	48.6	46.8	46.1	42.9

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

- This year 56% reported being married versus 69% in 2008, with 21% (26%) single and only 2% (versus 14%) in an extended family.
- The same share each year, 64% reported no children living with them.

Table 50 – Household Composition & Children at Home

	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
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%
Ages of Children at Home										
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 VISITOR 2018 MEDIAN HOUSEHOLD INCOME

- Mono County visitors reported 2018 median household income of \$89,900 versus \$92,600 in 2008.
- Nearly 40% (35%) reported income of more than \$100,000.
- Highest median income by season was Winter at \$116,000 (\$124,700), by residence for Californians at \$95,000 (\$100,400), and by lodging for those in other paid lodging at \$128,000 (\$122,200).

Table 5 1a – 2018 Annual Household Income

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all)	Activities		MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Valid Base:	792	185	211	174	222	425	216	151	458	257	164	284	152	143
Under \$30,000	8.9%	6.0%	12.9%	10.4%	4.0%	8.2%	13.1%	4.3%	8.6%	11.5%	3.1%	3.6%	1.4%	9.8%
\$30,000 - \$49,999	7.6%	11.1%	6.3%	5.9%	8.2%	7.7%	7.8%	7.1%	8.4%	8.1%	7.9%	8.6%	4.1%	12.0%
\$50,000 - \$74,999	18.2%	14.3%	20.7%	13.1%	22.5%	19.2%	17.8%	16.1%	15.4%	16.6%	20.2%	15.4%	14.7%	20.8%
\$75,000 - \$99,999	25.6%	13.5%	26.9%	28.6%	30.4%	18.9%	25.8%	44.1%	18.8%	18.1%	18.3%	32.9%	18.4%	15.7%
\$100,000 - \$199,999	30.0%	31.6%	27.0%	31.8%	31.5%	30.7%	30.7%	26.9%	33.4%	30.7%	37.4%	35.4%	40.1%	33.7%
\$200,000 - \$500,000	9.0%	22.0%	5.6%	9.6%	3.1%	14.1%	4.6%	1.5%	13.8%	14.1%	12.1%	3.9%	20.0%	7.1%
Over \$500,000	0.7%	1.5%	0.5%	0.7%	0.4%	1.2%	0.2%	0.0%	1.4%	0.9%	1.1%	0.1%	1.2%	0.9%
Net \$100k+	39.7%	55.1%	33.1%	42.1%	35.0%	46.0%	35.5%	28.4%	48.6%	45.7%	50.6%	39.4%	61.3%	41.7%
Median:	\$89,921	\$116,048	\$84,327	\$92,995	\$87,586	\$94,736	\$85,953	\$87,749	\$98,255	\$94,028	\$101,604	\$91,994	\$128,319	\$86,796

2018 MEDIAN HOUSEHOLD INCOME BY PLACE VISITED

- Highest 2018 median household income by place visited was among Mammoth Mountain visitors at \$127,200 and June Lake visitors at \$106,316.

Table 51b – 2018 Annual Household Income by Place Visited

	Total Visitor	Places visited in Mono County										
		Mono Lake	Mam. Lakes Town	June Lake	Mam. Mtn.	Mam.-Lakes Basin	Bridge port	Coleville/Walker/Topaz	Lee Vining	Convict Lake	Twin Lakes	Bodie
Valid Base:	792	305	359	277	150	159	122	73	139	144	91	146
Under \$30,000	8.9%	12.0%	6.2%	3.4%	8.0%	3.8%	7.4%	0.0%	18.6%	5.9%	1.6%	6.4%
\$30,000 - \$49,999	7.6%	6.0%	5.9%	7.7%	5.5%	5.7%	10.0%	6.2%	7.6%	12.0%	6.3%	6.3%
\$50,000 - \$74,999	18.2%	14.0%	20.2%	14.7%	13.1%	18.6%	20.8%	16.7%	8.8%	18.0%	21.6%	23.8%
\$75,000 - \$99,999	25.6%	29.5%	20.6%	21.9%	14.5%	21.3%	32.0%	52.1%	18.4%	19.4%	26.4%	29.4%
\$100,000 - \$199,999	30.0%	29.0%	31.6%	37.0%	33.0%	35.8%	19.9%	25.0%	33.5%	33.6%	37.8%	30.3%
\$200,000 - \$500,000	9.0%	9.5%	14.3%	14.7%	24.1%	14.0%	9.5%	0.0%	12.3%	10.8%	5.7%	3.9%
Over \$500,000	0.7%	0.1%	1.1%	0.7%	1.9%	0.9%	0.5%	0.0%	0.9%	0.3%	0.7%	0.0%
Median:	\$89,921	\$90,354	\$96,456	\$106,316	\$127,207	\$101,690	\$84,272	\$88,001	\$95,480	\$93,129	\$94,419	\$86,511

RESPONDENT BASE SKEWED MALE

- Overall 61% (55%) of respondents were male and this is relatively consistent across segments.
 - While this is the respondent only, the share should reflect the overall visitor population.
- Of note the highest share for females was in Summer at 48% (47%).

**Table 52 – Gender
(respondent)**

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all)	Activities		MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camp-ing
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	169
Male	61.3%	68.2%	64.9%	52.3%	59.8%	62.5%	59.0%	61.8%	64.4%	64.0%	65.1%	63.8%	59.6%	60.1%
Female	38.4%	31.8%	34.7%	47.7%	39.8%	37.3%	40.9%	37.9%	35.3%	35.4%	34.1%	35.8%	39.5%	39.9%
Other	0.2%	0.0%	0.4%	0.0%	0.4%	0.3%	0.1%	0.4%	0.3%	0.6%	0.8%	0.4%	0.8%	0.0%

Appendix

- **Methodology & Sample**
- **Interview Locations**
- **How to Read the Tables**

Methods for the Multi-Phase Study

- The overall methodology for this study is as follows:
 - Approximately 1200 face-to-face interviews with visitor groups out and about in ___, conducted in 4 quarterly waves of 300 interviews each.
 - A “Visitor” is defined as: Anyone residing outside Los Angeles County who is in ___ for any temporary purpose(s) other than for regular work or to attend school.
 - Approximately 200 telephone interviews with ___ residential households, conducted in 2 biannual waves of approximately 100 each
 - Hotel/motel operating data by quarter and by lodging segment, collected at the end of the study year.

ECONOMIC IMPACT MODEL/ESTIMATE DERIVATION

- One of the study's main purposes is to measure tourism's economic and fiscal impacts in Mono County. These impacts are derived directly from visitors (on-site intercept survey) and from Mono County lodgings. Secondary data sources include Visit California and Mono County government (for tax data).
- All results are input into an economic impact model to estimate visitor activity in terms of the number of visitors, visitor days and visitor spending, in total and per-capita, and by visitor lodging segments (lodging, private home and day visitors). The model begins by estimating the number of lodging guests from the number of occupied lodging rooms. The model then calculates the number of day visitors resulting in the estimate of total visitors. Then applying length of stay from the intercept data to the number of visitors yields the estimated total and per-visitor average visitor days. Finally, applying the average spending results in total annual direct visitor spending and direct spending for day visitors, and guests of lodging properties.
- Employment data from the California Travel & Tourism Commission are used to estimate the number of direct tourism jobs supported in Mono County, and taxes are calculated from the aggregated spending figures estimated by CIC's economic impact model.
- Thus, indicators such as demographics and trip behaviors use the actual intercept results, while lodging occupancy and room rate data from the lodging study are used to estimate the number of lodging guests and lodging guest spending.

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 53 – 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%

DEFINITIONS

- A **visitor** is someone who resides outside of Mono County and visiting Mono County for any purpose other than regular employment or to attend school. The residency and trip purpose provide a common basis to differentiate "local" from "visitor" impacts.
- The following explains the key visitor measurements and how they are derived.
- A **visitor group** is the immediate travel party, which multiplied by the group size (the average number of persons per group) generates the number of visitors.
- **Visitor days** refers to the total number of days spent in Mono County by all visitors, calculated as the number of visitors multiplied by the average length of stay (number of days) in Mono County, e.g., two persons staying three days represent six visitor days.
- **Visitor spending** refers to total or daily per-person amounts spent by visitors for all goods and services while in Mono County (e.g. the two people who each spend \$100.00 over three days account for \$600.00 of total spending).

Reading the Report Tables

- Each table in the report has a heading, with some or all of the following columns:

	Total Visitor	Winter	Spring	Summer	Fall	Residence			Purposes (all)	Activities		MC Lodging		
						CA	Other U.S.	Int'l	Outd. Rec.	Hike	Fish	Hot/Mot/Inn	Other paid	Camping
Base:	1032	224	268	213	327	524	273	235	553	298	199	410	195	169
Male	61.3%	68.2%	64.9%	52.3%	59.8%	62.5%	59.0%	61.8%	64.4%	64.0%	65.1%	63.8%	59.6%	60.1%
Female	38.4%	31.8%	34.7%	47.7%	39.8%	37.3%	40.9%	37.9%	35.3%	35.4%	34.1%	35.8%	39.5%	39.9%

- Total:** all 2018 individual visitors, cumulative across waves
 - Season:** compares each of the four seasonal interviewing waves
 - Residence:** where visitors originate from: California (CA), Other U.S. states (excl. California), or International (Int'l,) countries
 - MC Lodging:** where and whether visitors lodged overnight: Mono County hotel, motel or inn; other paid lodging (e.g. condo, short-term shared rental); private residence, or camping (tent or RV)
- In the tables, statistical differences between these groups are indicated by a highlight of either purple or blue (higher/lower than average).
- The bold numbers below the header are the “base” number of respondents per question
- The sample of 1,032 has an error factor of +/- 3.1% at the 95% confidence level.