

A red and green Mammoth Lakes trolley bus is parked on a snowy road. In the background, a large, multi-story resort building with a snow-covered roof is visible, surrounded by snow-laden evergreen trees under a clear blue sky. The scene is a winter landscape.

Mammoth Lakes Tourism Resident Sentiment

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Research Overview & Objectives

Mammoth Lakes Tourism, along with its agency-partner The Shipyard, sought to better understand the needs, perceptions, and opinions of the community and tourism. To achieve this, Future Partners developed a research study to provide critical insights into residents and business owners in Mammoth Lakes, which included:

- Understand detailed resident and business owner profiles
- Evaluate key metrics (e.g., likelihood to recommend, etc.) for Mammoth Lakes and Mammoth Lakes Tourism
- Gauge resident sentiment towards tourism and the Mammoth Lakes Tourism organization
- Identify strategies for community engagement, support, tourism growth, etc.

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Methodology

Future Partners collected 261 online survey responses (via a postcard mailing) among residents of Mammoth Lakes. The surveys were collected from November through December 2023 and include responses from key audiences of interest: Primary Residents, Business Owners, and Second Homeowners. The survey was available in English and Spanish.

Additionally, three (3) focus groups were conducted among primary residents (renters and homeowners), two (2) of the focus groups were conducted among business owners, and two (2) in-depth interviews were conducted among those who owned a second home in Mammoth Lakes. Each focus group was 90 minutes and included up to five (5) participants, while the in-depth interviews each lasted 45 minutes. Residents received \$150 for their participation, while business owners received \$300.

This report details the findings from the online survey with relevant quotes from the focus groups/in-depth interviews included throughout to add depth, context, and clarity.

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Executive Summary

Residents feel that outdoor recreation/activities are the biggest benefit to living in Mammoth Lakes, while affordable housing and infrastructure are the largest needs.

In general, the benefits of living in Mammoth Lakes outweigh the issues for residents.

Residents are very likely to recommend Mammoth Lakes as a place to visit for a leisure vacation, but not as likely to recommend it as a place to live and not likely to recommend it as a place to start/open a new business.

Residents agree that the revenues from tourism are important to funding government services.

In general, residents understand the importance of tourism to the town. Those who have lived in Mammoth Lakes less than 5 years believe that tourism is even more important the vitality of the economy. However, residents also perceive tourism to cause a number of issues from environmental to economic.

Most residents feel as though the benefits and problems associated with tourism are equal, but only some agree that benefits of tourism outweigh the problems it causes.

Residents are familiar with and have knowledge of Mammoth Lakes Tourism, and they feel as though its mission statement aligns with their expectations.

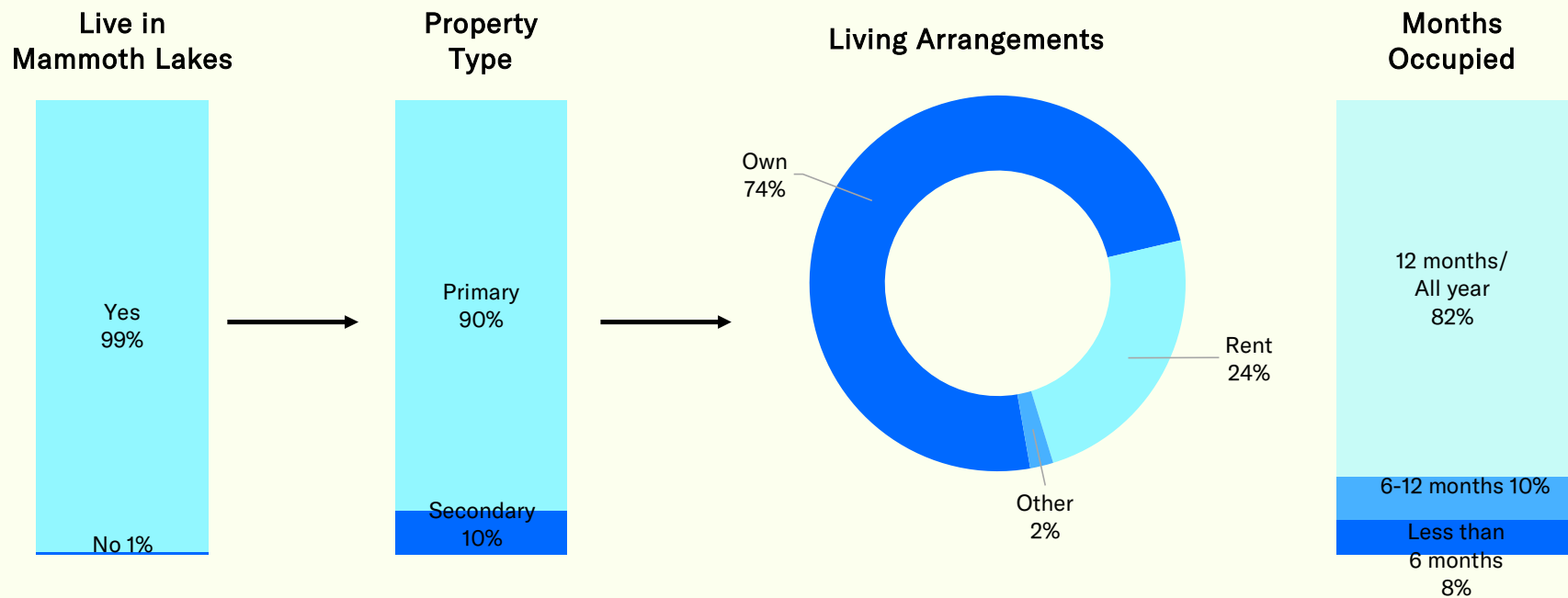
However, almost half of residents are dissatisfied with the organization's efforts to balance driving tourism with the needs of residents. Residents value the focus on stewardship and driving off-peak visitation but would like to see Mammoth Lakes Tourism do more for the community.

Most residents feel that their voice is not heard and suggest that Mammoth Lakes Tourism focus more on resident needs.

Detailed Findings: Resident Profile

The vast majority of respondents are primary residents that own their home and live in Mammoth Lakes the entire year.

Boomers are significantly more likely than Millennials and Generation X to not occupy their home all year.



Question: Do you currently live or own a home in Mammoth Lakes?

Question: Is this Mammoth Lakes property your primary home or secondary home?

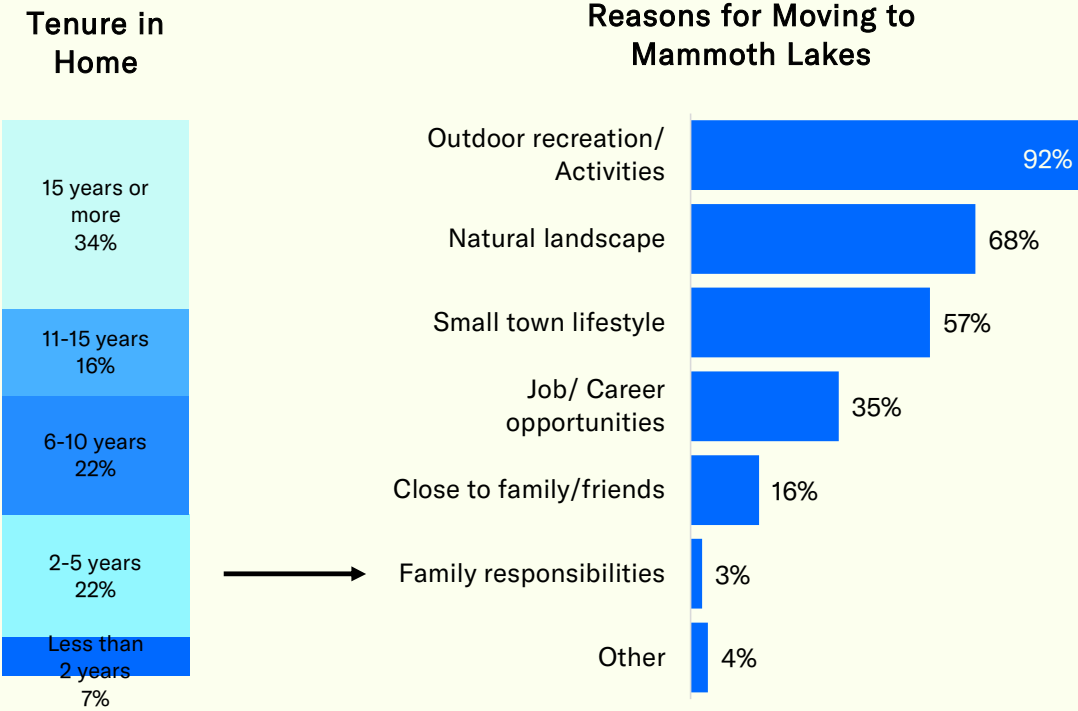
Question: Which best describes your Mammoth Lakes home?

Question: And for how many months out of the year do you occupy your home?

Base size: Total Respondents (261); Total Residents (258)

Most residents have been in their homes more than 5 years.

Among those newer to the area, outdoor recreation/activities was the most common reason for moving to Mammoth Lakes.



“It has very special energy to me. [I enjoy] the opportunities with nature, hiking, backpacking, skiing. I find it very energizing, not just physically, but at a spiritual level as well.”
 Primary Resident

“Not to be cliché, but the mountains were calling. I just love living in this smaller, tight-knit community. It is a different culture from where we were [Orange County, CA].”
 Primary Resident

“I felt it was really beautiful area and an area that had great access to the outdoors and still was somewhat relatively close to larger urban centers.”
 Primary Resident

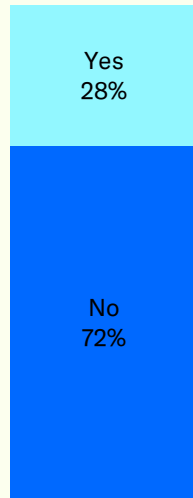
Question: How long have you had a home in Mammoth Lakes?
 Question: What were the main reasons for moving to Mammoth Lakes?
 Base size: Total Residents (258); Recent Residents (74)

Detailed Findings: Business Owner Profile

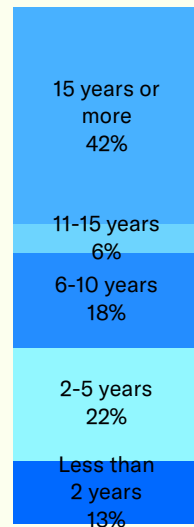
Almost one-third of respondents own a business in Mammoth Lakes.

Although the types of businesses owned vary greatly, the vast majority have operated for more than 5 years.

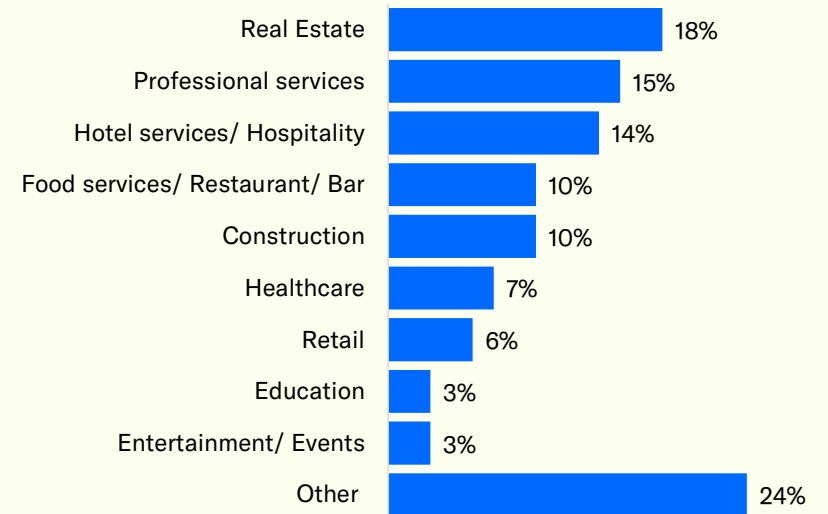
Own a Business in Mammoth Lakes



Years of Operation



Type of Business



Non-profit
Property management
Contracting Services

Question: Do you own a business that operates in Mammoth Lakes?

Question: About how long has your company been doing business in Mammoth Lakes?

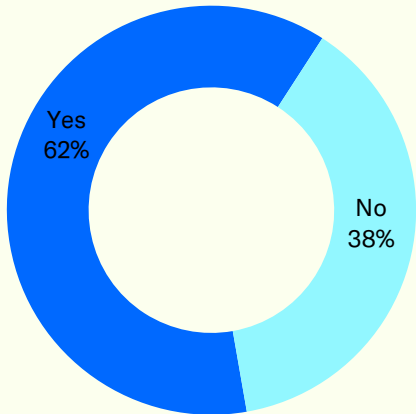
Question: What type of business do you operate in Mammoth Lakes?

Base size: Total Respondents (261); Business Owners (72).

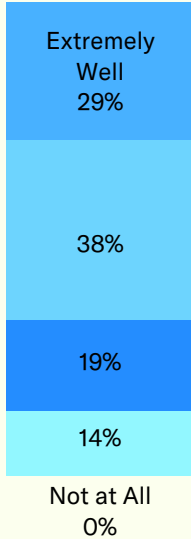
Most business owners feel that TBID has a positive impact on their business and the community.

Although a small sample size, all relevant business owners feel that they have at least some understanding of how TBID funds are being used.

TBID has Positive Impact



Understanding of TBID



Food services/ Restaurant/ Bar Retail

“It would be a different town [without it]. Most initiatives just wouldn’t happen because they're funded a lot by taxes [TBID]. It's a win-win all around to be able to have those initiatives.”
Business Owner

“It is independent, and it is funded by tax money. The advertising they [Mammoth Lakes Tourism] do is for the town.”
Business Owner

Question: As a business owner in the Mammoth Lakes community do you feel that your TBID assessment provides a positive impact on you, your business, and the community?

Question: And how well do you understand how your TBID assessed dollars are used?

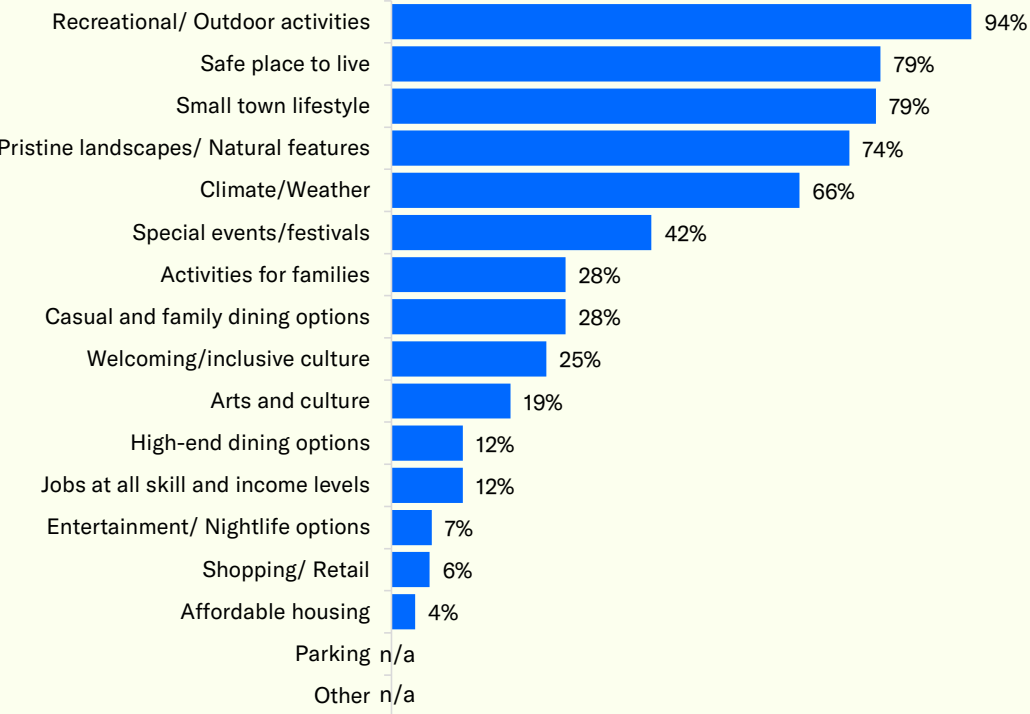
Base size: “Food services/ Restaurant/ Bar”, “Hotel services/ Hospitality”, “Retail” Business Owners (21).

Detailed Findings: Community Perceptions

Most residents feel that outdoor recreation/activities is the biggest benefit, while affordable housing is the largest need.

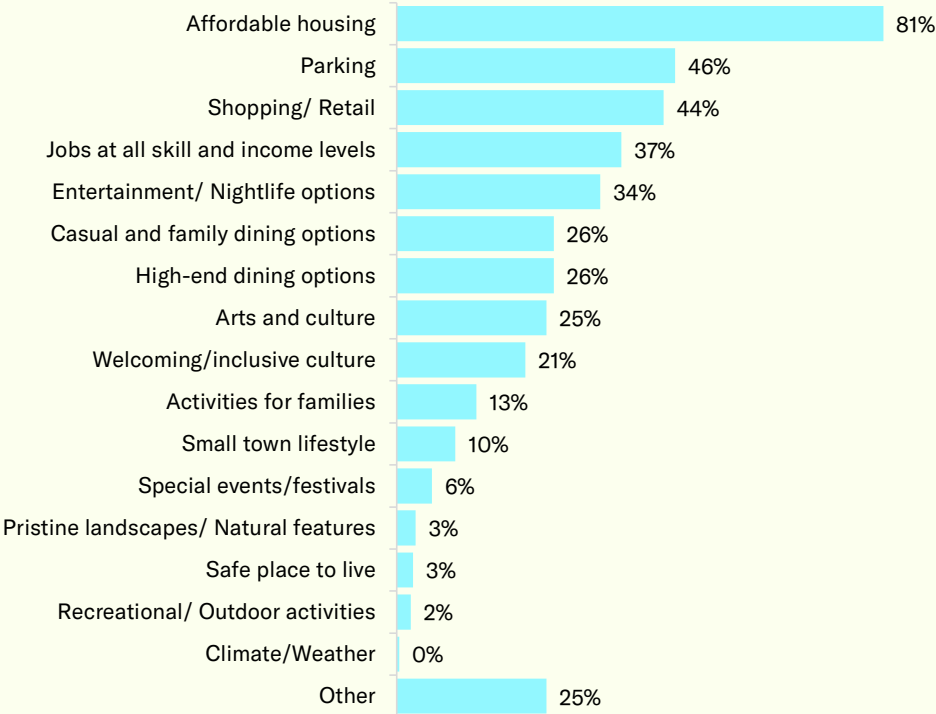
Benefits of Mammoth Lakes

Total Respondents



Lacking in Mammoth Lakes

Total Respondents



Question: Which of the following benefits do you appreciate about the Mammoth Lakes community?
 Question: And which, if any, of the following do you feel is lacking in the Mammoth Lakes community?
 Base size: Total Residents (258)

Government Vision
 Community Services/Spaces
 Social Services
 Local Discounts/Pricing

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In general, the benefits outweigh the issues for Mammoth Lakes residents.

“If you're looking for certain kinds of services or healthcare, you either need to go out of town or wait a very long time. [Those] are relatively minor thing for me. The positives so far outweigh the negatives.

Primary Resident

“[Aside from the nature and outdoor recreation], I really feel like I can make a difference in the community as opposed to living somewhere like Orange County.”

Business Owner

It's not accessible for a lot of your basic things that you could get very easily if you lived in a city. We [have to] get creative in how we manage.”

Primary Resident

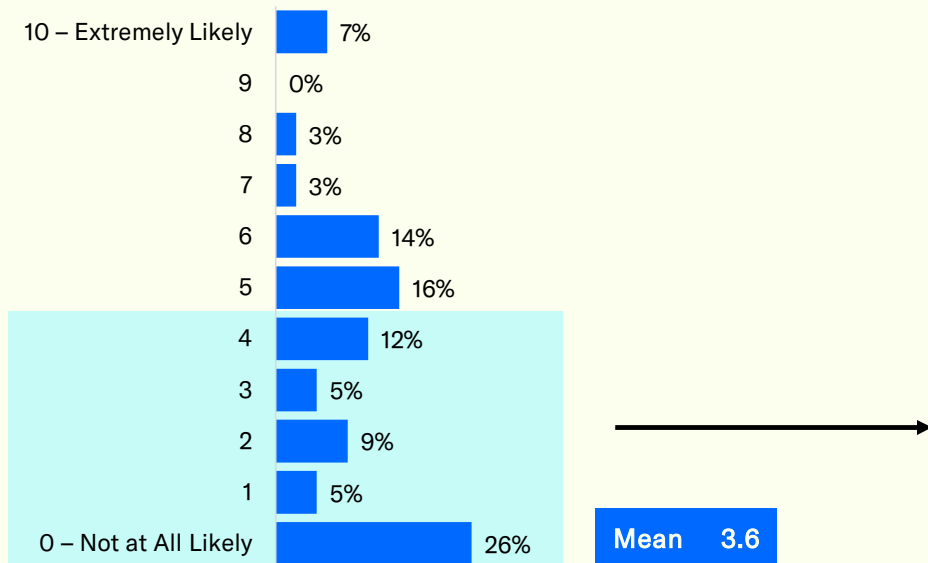
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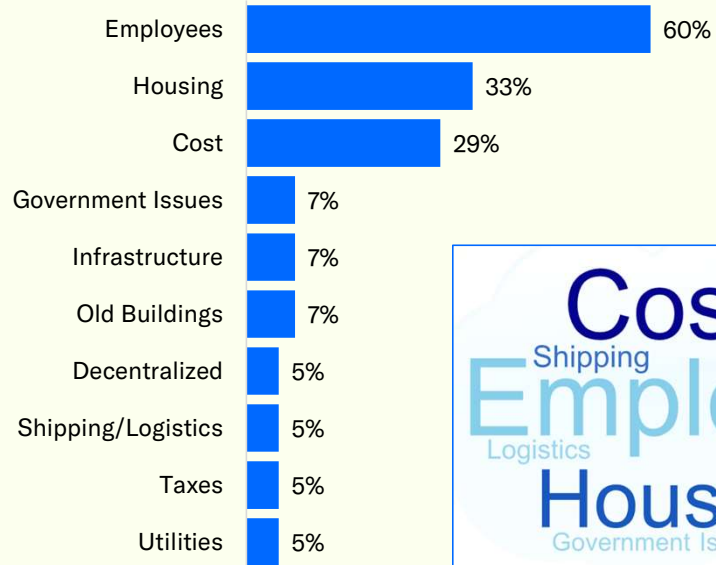
Most business owners are unlikely to recommend Mammoth Lakes a place to start or open a business.

The main reasons business owners are unlikely to recommend Mammoth Lakes are due to the lack of employees, the lack of adequate housing, and the costs associated with living and running a business.

Likelihood to Recommend to Open a Business



Common Reasons for Being Unlikely to Recommend to Open a Business



Question: How likely are you to recommend Mammoth Lakes to someone as a place to start or open a new business?

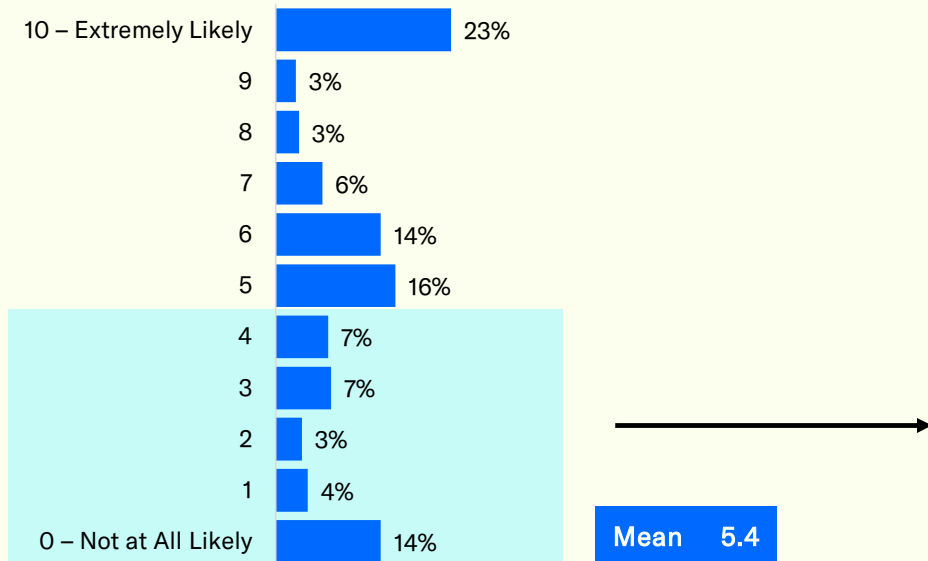
Question: Why would you not recommend Mammoth Lakes to someone as a place to start or open a new business? (Coded open-ended responses)

Base size: Business Owners (74)

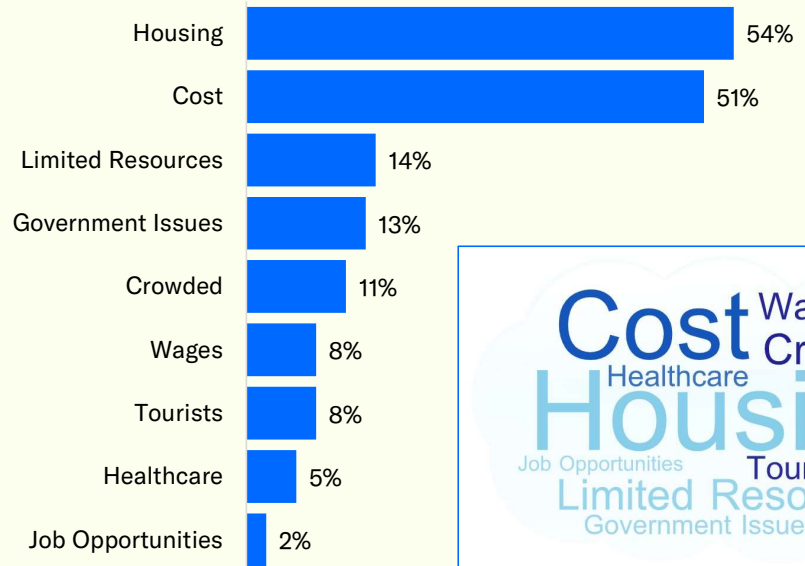
Only a slight majority of residents are likely to recommend Mammoth Lakes as a place to live.

The main reasons residents are unlikely to recommend Mammoth Lakes as a place to live are the lack of housing and the cost of living.

Likelihood to Recommend as a Place to Live



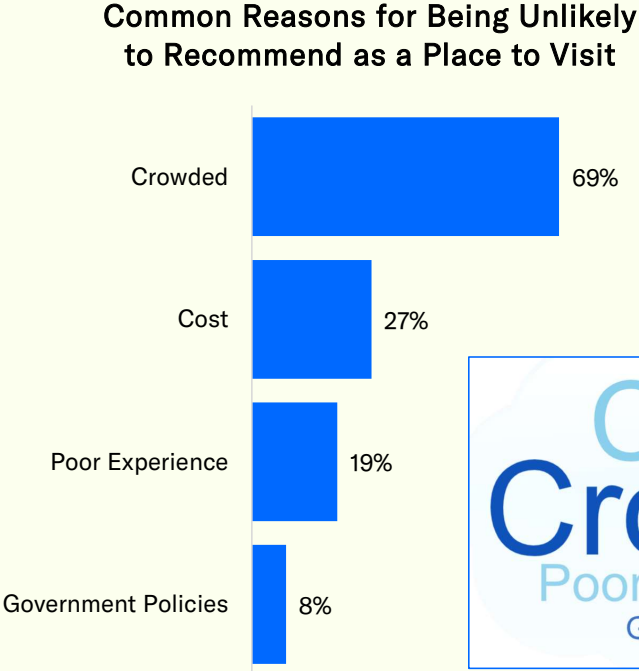
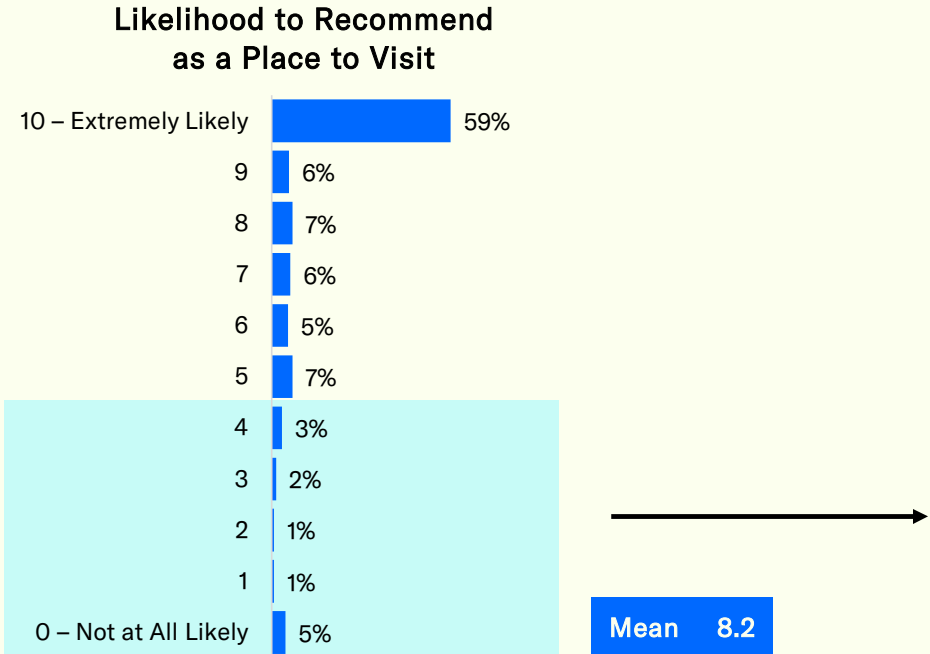
Common Reasons for Being Unlikely to Recommend as a Place to Live



Question: How likely are you to recommend Mammoth Lakes to someone as a place to live?
 Question: Why would you not recommend Mammoth Lakes to someone as a as a place to live?
 Base size: Total Residents (258).

Most residents are very likely to recommend Mammoth Lakes as a place to visit for a leisure vacation.

The main reason residents are unlikely to recommend Mammoth Lakes as a place to visit is overcrowding.



Cost
Crowded
 Poor Exeperience
 Government Policies

Question: How likely are you to recommend Mammoth Lakes to someone as a place to visit for a leisure vacation?
 Question: Why would you not recommend Mammoth Lakes to someone as a place to visit for a leisure vacation?
 Base size: Total Residents (258).

In general, residents have a neutral perception of Mammoth Lakes.

“We're a small town Monday through Thursday, then Friday, Saturday, and Sunday we get a lot of visitors, and it becomes quite busy.”

Primary Resident

“I don't think Mammoth Lakes will ever have the charm of a Park City. It's never going to show up in a magazine as one of the ‘10 quaintest ski towns in America’. And that's okay - it is what it is.”

Primary Resident

“[Mammoth Lakes] is remote and that's a double-edged sword. However, the place and the people that live here really want to be here. It's magic.”

Primary Resident

“It has become a place where people no longer work together as a community. People are now having to steal employees from each other. And it's created a bit of an issue in the town”

Primary Resident

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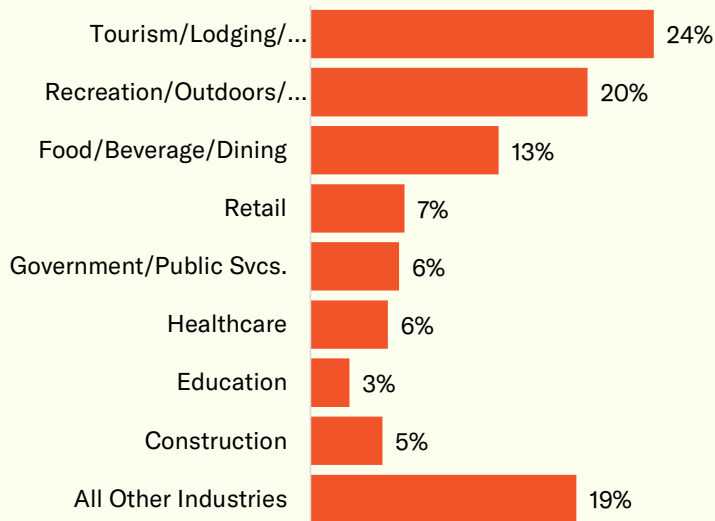


Detailed Findings: Tourism Perceptions

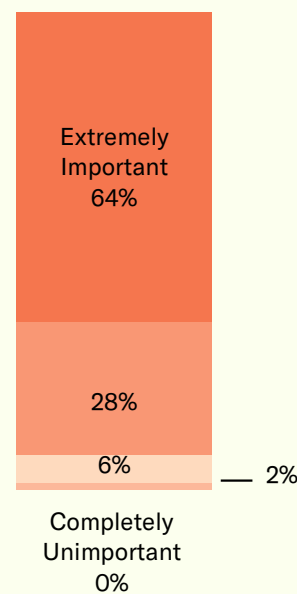
"Tourism/Lodging/Hospitality" and "Recreation/Outdoors" are viewed as the two most important industries.

Almost all residents view tourism as very important to Mammoth Lakes' economy.

Most Important Industry in Mammoth Lakes



Tourism's Importance to Economy



"I think we've done a great job promoting tourism and an absolute, terrible job promoting any other businesses coming to this town."
Business Owner

"The town is in good financial shape right now because of the visitation we've had over the past few years."
Primary Resident

"The thing that I don't think is good for us is that [although] business is booming, it's all tourism-based and the majority of the jobs are low paying ones."
Business Owner

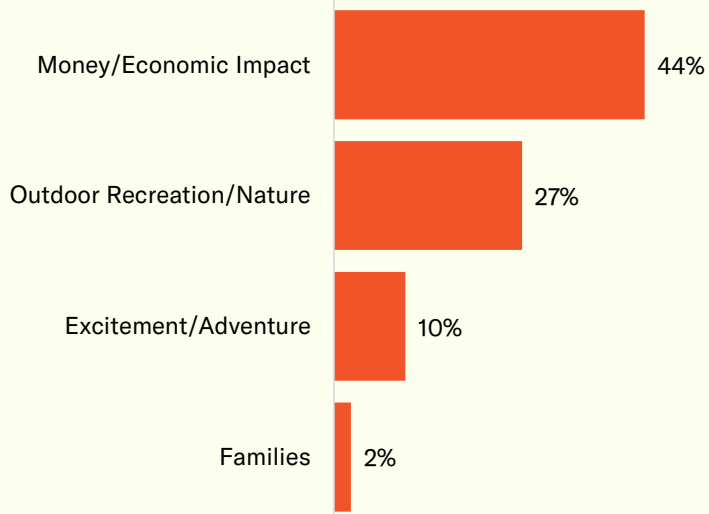
Question: What are Mammoth Lakes' most important industries?

Question: How important is the tourism industry to the vitality of the Mammoth Lakes economy?

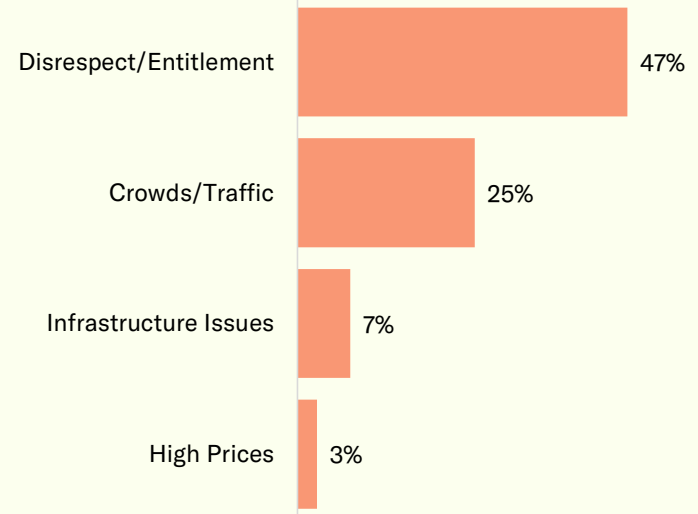
Base size: Total Residents (254-258).

The most common positive association with visitors to Mammoth Lakes is money/economic impact, while disrespect/entitlement is the most common negative association.

Positive Associations with Mammoth Lakes Visitors



Negative Associations with Mammoth Lakes Visitors



Question: When you think of visitors to Mammoth Lakes, what is the first positive thing that comes to mind?

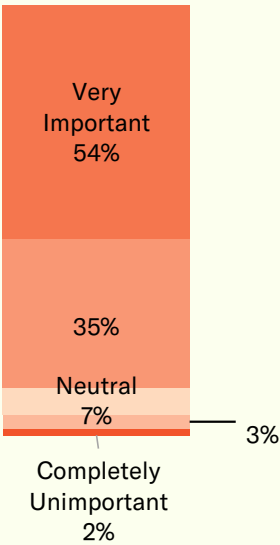
Question: When you think of visitors to Mammoth Lakes, what is the first negative thing that comes to mind?

Base size: Total Residents (258).

Most residents agree that the revenues from tourism are important to funding government services.

Although most residents feel that businesses rely on tourism and that it creates jobs, they also feel as though tourism does not make Mammoth Lakes a better place to live. Only one statement had a significant difference among key demographic segments: agreement with the statement highlighted in a darker shade is significantly higher among Boomers compared to Millennials and Generation X.

Importance of Tourism Revenue



Agreement with Statements on Tourism in Mammoth Lakes
Top-2 Box



Question: How important are tourism-generated revenues in paying for the Mammoth Lakes' government services (i.e., police, schools, parks, trails, parking, roads, and repairs)?

Question: How much do you agree with these statements?

Base size: Total Residents (258).

In general, residents understand the importance of tourism to the town.

“We're paying these extra tourism taxes as year-round residents. We don't get a break from those.”

Primary Resident

“The TOT revenue is huge for the town, and that really helps us keep going.”

Primary Resident

“The tax dollars are critical. We need their money or we're not going to [be able to make] the changes and upgrades that the town so desperately needs.”

Primary Resident

“The revenue that we get from tourism is what keeps us alive and running. [Tourism] employs the majority of this town.”

Business Owner

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Most residents perceive tourism to cause a number of issues from environmental to economic.

Those issues highlighted in a lighter shade are perceived to be significantly worse among Millennials compared to Generation X and Boomers.

Perceived Issues caused by Tourism



“If we didn't have tourism, then we wouldn't have the Mammoth Lakes that we have today. [We know that] people come for the mountain and we're going to have tourism, so we need to find a way to [make it work].”

Primary Resident

“I've had friends leave and come back, because in comparison to other resort and ski communities, I think Mammoth Lakes is still doing really well and is still a pretty desirable place.”

Primary Resident

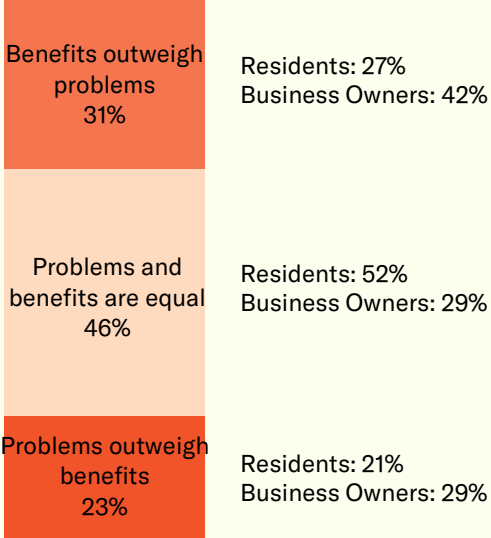
Question: Now think about issues that can be caused by tourism. Which of the following are problems Mammoth Lakes is currently facing?

Base size: Total Residents (258).

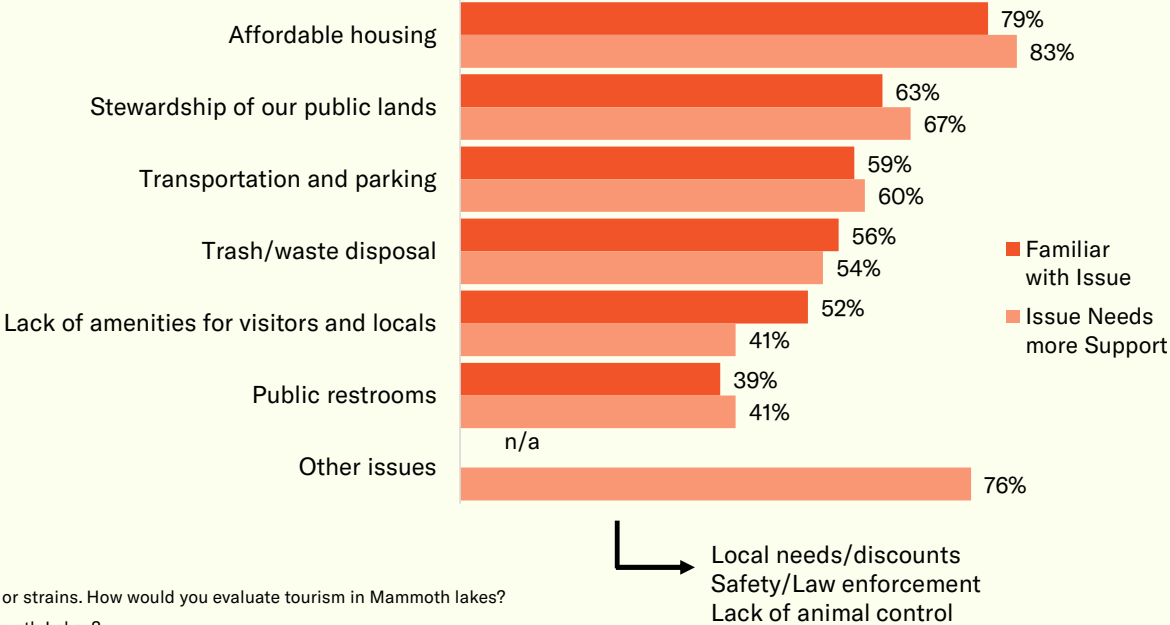
Only one-third of residents agree that benefits of tourism outweigh the problems caused by it, but business owners have a significantly higher opinion of tourism.

In general, residents feel as though affordable housing, stewardship of public lands, and transportation/parking are the most pressing issues facing Mammoth Lakes. Those who have lived in Mammoth Lakes less than 5 years are not as familiar with the issues facing the town.

Opinion of Tourism



Mammoth Lakes Issues



Question: And now consider both the overall benefits that tourism brings, as well as the problems or strains. How would you evaluate tourism in Mammoth lakes?
 Question: How familiar are you with the following issues, and the efforts to mitigate them, in Mammoth Lakes?
 Question: Which of the following issues need more support in Mammoth Lakes?
 Base sizes: Total Residents (258).

Residents understand there is some comprise to living in Mammoth Lakes.

“The pros definitely outweigh the cons just in terms of the opportunities that tourism creates for people living here. We wouldn't have even the facilities we have now if we weren't a tourist town.”

Primary Resident

“I moved here so that I could enjoy the outdoors [and] cool stuff. It used to be that twice a year there was a reprieve from constant tourism.”

Business Owner

“There is this intensity [from visitors]. They need to chill out. We're on mountain. We moved here because we don't want that energy back in the city.”

Primary Resident

“There are certainly more pros and cons, [otherwise] I wouldn't have lived here for 14 years. We're lucky we live in a place where other people come to vacation”

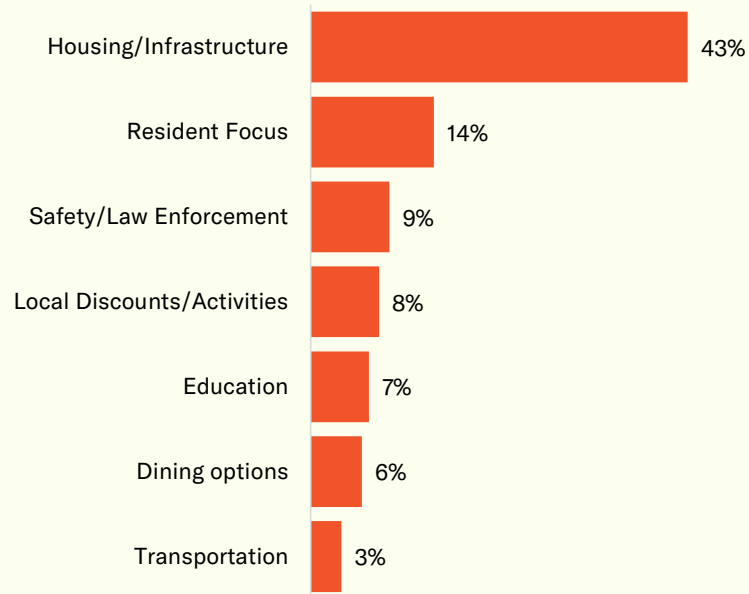
Primary Resident

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The most commonly suggested change and/or development to improve Mammoth Lakes include adding more and better housing/infrastructure.

Suggested Changes and/or Developments



“Connectivity and housing. Unless we stop, regroup, and work on the infrastructure and improve the morale of the people that actually live here and run the town we risk doing [more] damage.”

Primary Resident

“We are pricing out people that are unable to see a future for themselves in Mammoth Lakes because of housing. [We lack] things like a community garden, co-op, or things that are community-focused.”

Primary Resident

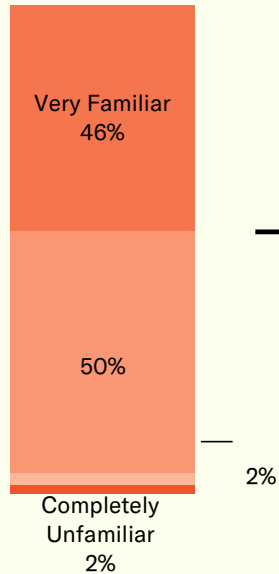
Question: And what changes and/or developments would contribute to making the Mammoth Lakes area better for BOTH visitors and residents?

Base sizes: Total Residents (258).

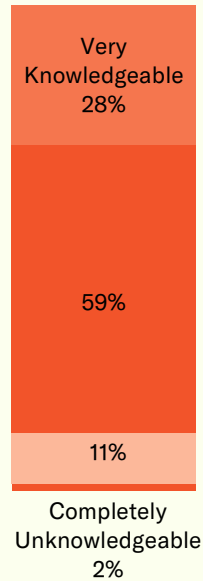
Detailed Findings: Mammoth Lakes Tourism

Almost all residents are familiar with Mammoth Lakes Tourism, and among those familiar, most have knowledge of the organization.

Familiarity with MLT



Knowledge of MLT

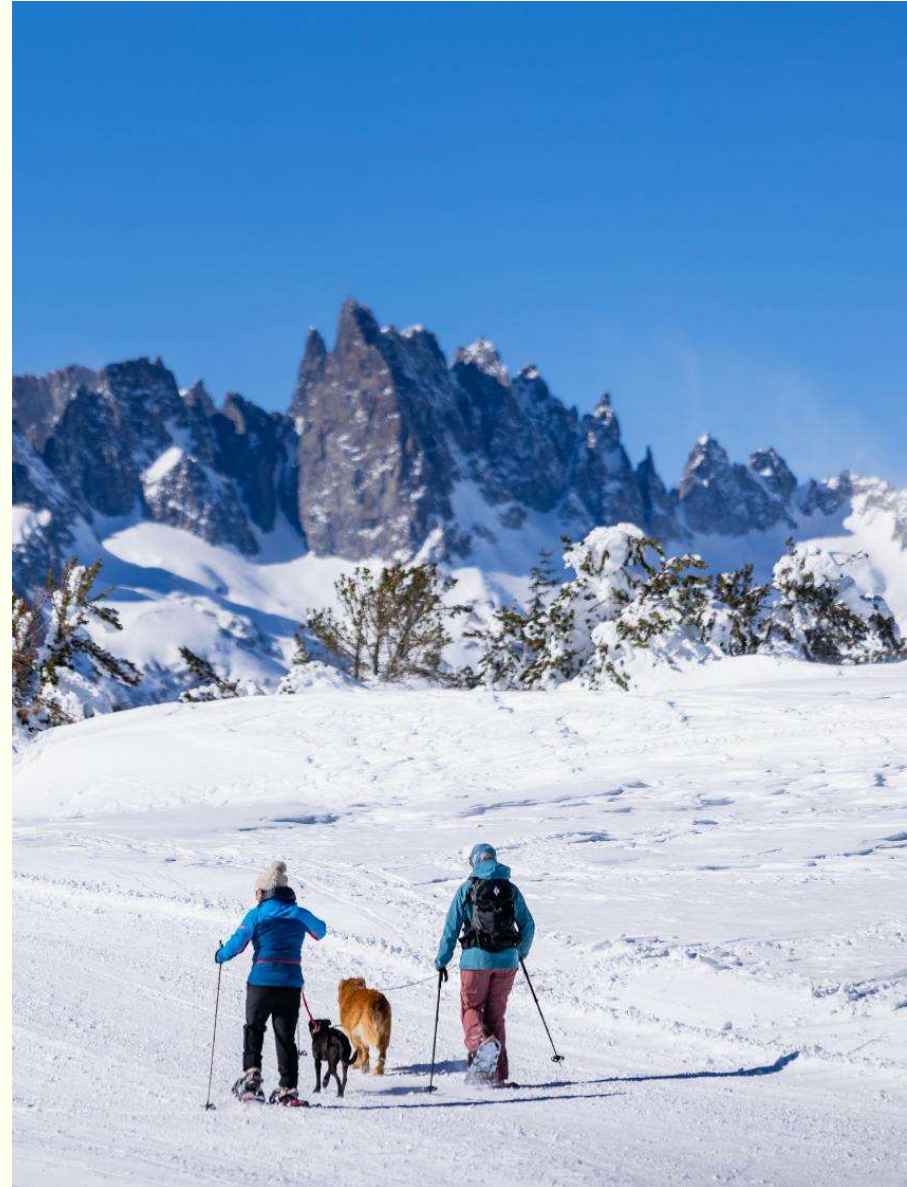


Question: How familiar are you with the Mammoth Lakes marketing organization and what they do to promote responsible tourism in the area?

Question: How well do you feel that you understand the mission, goals, and responsibilities of the Mammoth Lakes marketing organization?

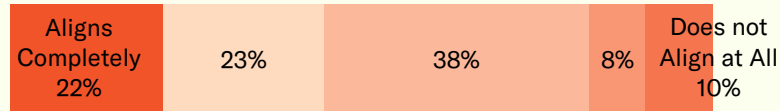
Base size: Total Residents (258); Residents Familiar with MLT (247).

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Most residents feel as though the mission statement aligns with their expectations, specifically stewardship and driving off-peak visitation.

Statement Aligns with Expectations of MLT



Mammoth Lakes Tourism (MLT) is the regional marketing and communication organization designed to promote Mammoth Lakes as a top global tourism destination. Funded primarily by the Mammoth Lakes Tourism Improvement District (TBID) and with additional secured funding from the Transient Occupancy Tax (TOT), MLT serves as an authority on travel and tourism to the Mammoth Lakes area and engages in opportunities and partnerships that will elevate the profile of the area, with a primary focus on driving non-peak visitation and a brand message of education and stewardship. Mammoth Lakes Tourism unifies business and community leaders to raise the relevance of travel to the destination and enhance the area.

Question: Does this align with expectations of the Mammoth Lakes marketing organization (also known as Mammoth Lakes Tourism or Visit Mammoth)?

Base sizes: Total Residents (258)

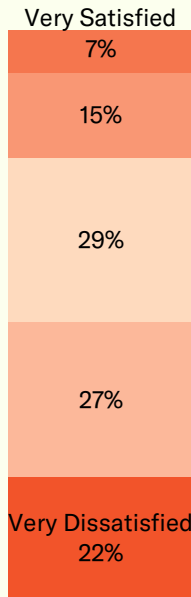
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Almost half of residents are dissatisfied with the organization's efforts to balance driving tourism with the needs of residents.

Business owners are significantly more satisfied with Mammoth Lakes Tourism's efforts compared to residents.

Satisfaction with MLT's Efforts



There was a huge push to get as many people here as possible at one point. There was a lot of advertising just to get people here, but it seems like it's definitely a little more targeted now.”

Primary Resident

“Although I think the driving non-peak visitation and the education and stewardship [objectives] are a bit of a reach, [they should] certainly be goals for the future.”

Primary Resident

“I want to hear testimonials from the local business community, because that [would] certainly influence my opinion of the organization.”

Primary Resident

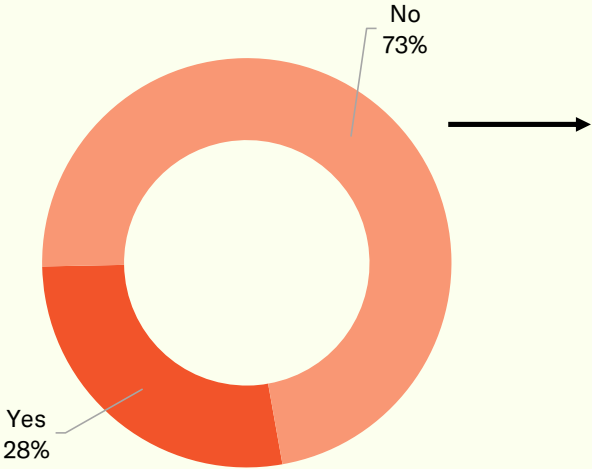
Question: How satisfied are you with Mammoth Lakes Tourism's efforts to balance driving tourism to the area with the needs of residents?

Base sizes: Total Residents (258); Residents who Feel Unheard (172).

Less than one-third of residents feel that their voice is heard regarding tourism. The most common suggestion for Mammoth Lakes Tourism is to focus on resident needs.

Most residents state that they would be interested in attending a town hall hosted by Mammoth Lakes Tourism.

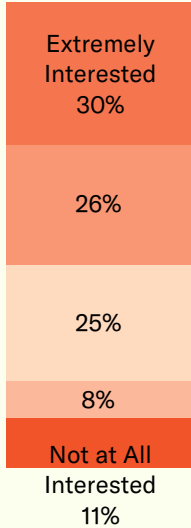
Resident Voices are Heard



Suggested Improvements to Better Listen to Residents



Interest in Attending MLT Town Hall

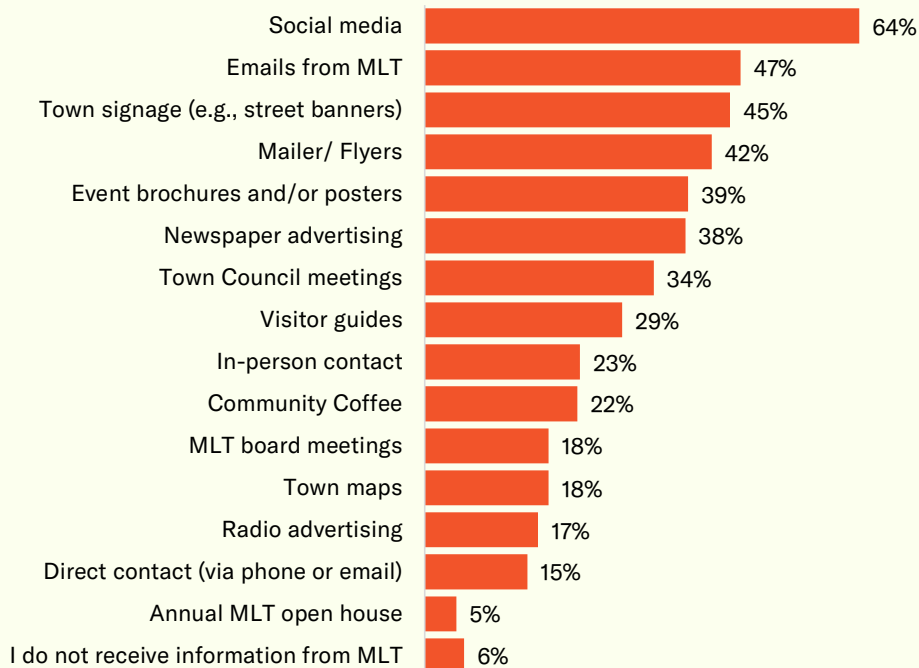


Question: Do you feel that the voices and ideas of residents are heard and taken into account when it comes to the management of tourism in Mammoth Lakes?
 Question: And what could Mammoth Lakes Tourism do to better listen and take into account your ideas?
 Question: How willing would you be to attend a town hall hosted by Mammoth Lakes Tourism where they hear from local residents
 Base sizes: Total Residents (258); Residents who Feel Unheard (172).

Social media and emails are the most common channels that residents use for Mammoth Lakes Tourism communications.

Occupancy data, visitor guide, and air service news are the most common types of information received from Mammoth Lakes Tourism.

Channel for MLT Communications



Information Received from MLT



Question: How do you receive information from Mammoth Lakes Tourism?

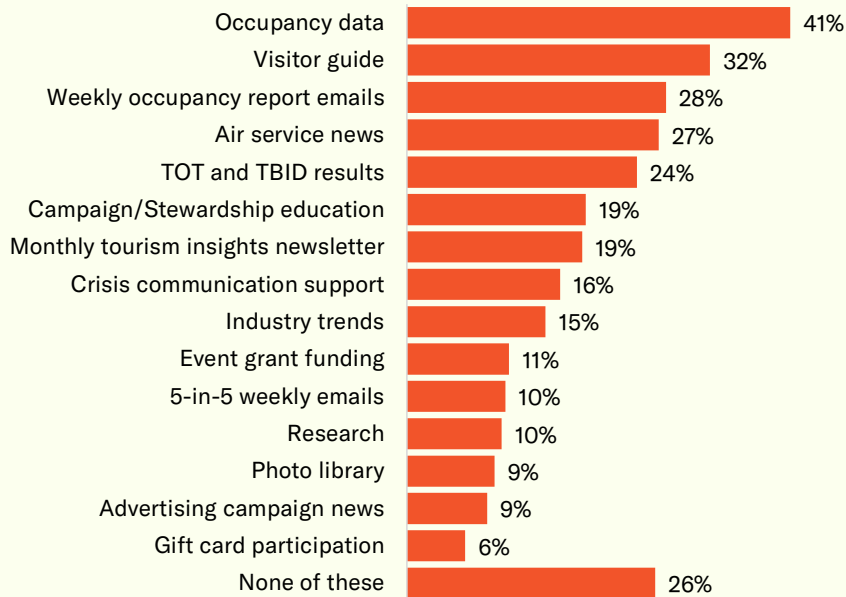
Question: What types of information do you receive from Mammoth Lakes Tourism?

Base sizes: Total Residents (258); Residents Receiving MLT Communications (243).

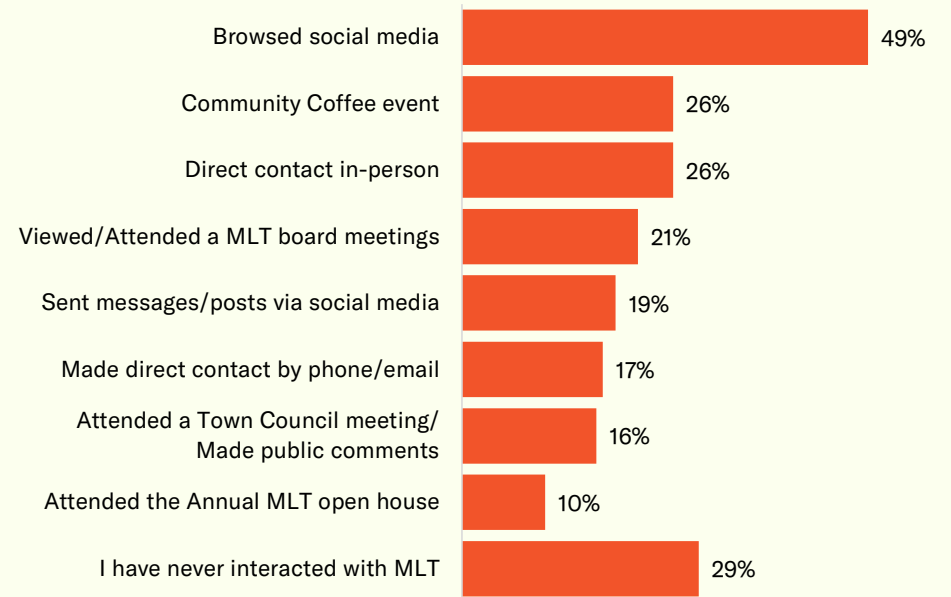
Occupancy data is the most useful information provided by Mammoth Lakes Tourism.

Browsing social media is the most common way of interacting with Mammoth Lakes Tourism.

Useful MLT Resources



Sources of Interaction with MLT



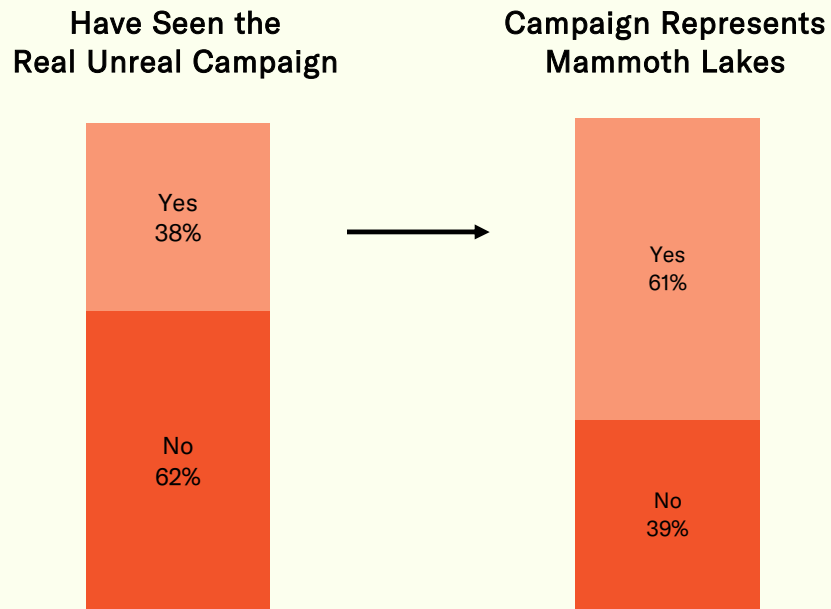
Question: Which resources that Mammoth Lakes Tourism provides do you find useful?

Question: How have you interacted with Mammoth Lakes Tourism?

Base sizes: Total Residents (258).

Most residents have not seen the Real Unreal advertising campaign.

Almost those who have seen the campaign, most feel as though the advertising accurately represents Mammoth Lakes.



Question: Have you seen messaging or advertising from the Real Unreal campaign for Mammoth Lakes?

Question: Do you think the Real Unreal campaign accurately represents the message Mammoth Lakes wants to send to visitors?

Base size: Total Residents (258); Residents Familiar with Campaign (99).

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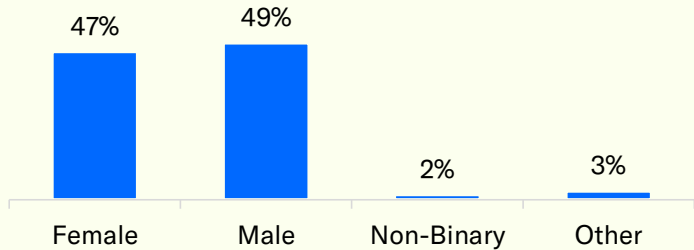


Appendix: Demographics

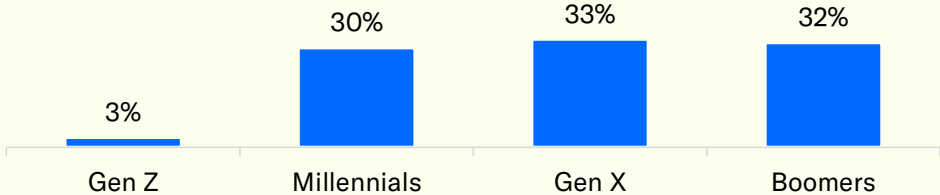
Demographics

Total Respondents

Gender



Generation

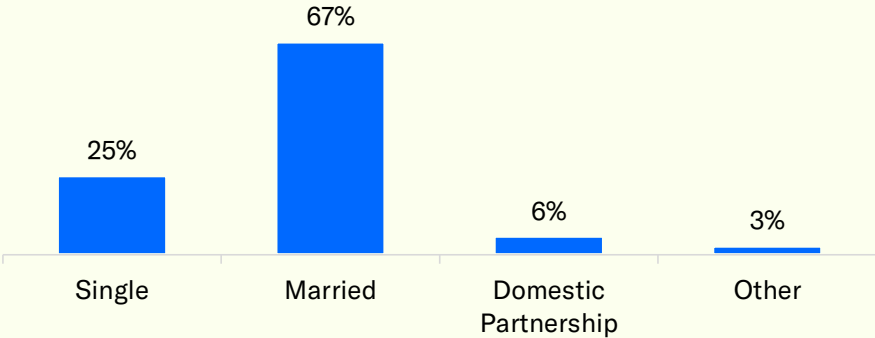


Average Age: 51 years

Demographics

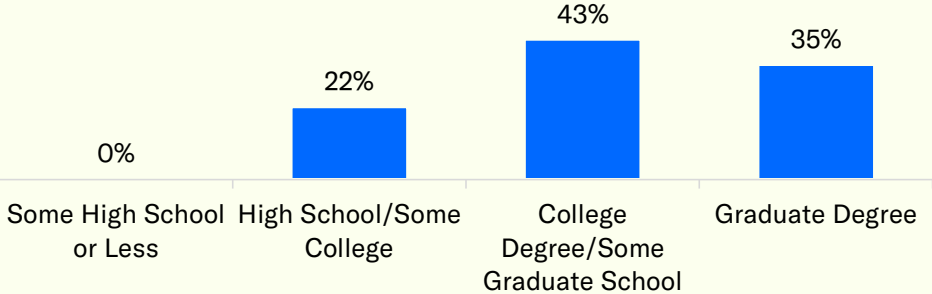
Total Respondents

Marital Status



Children in Household: 21%

Education

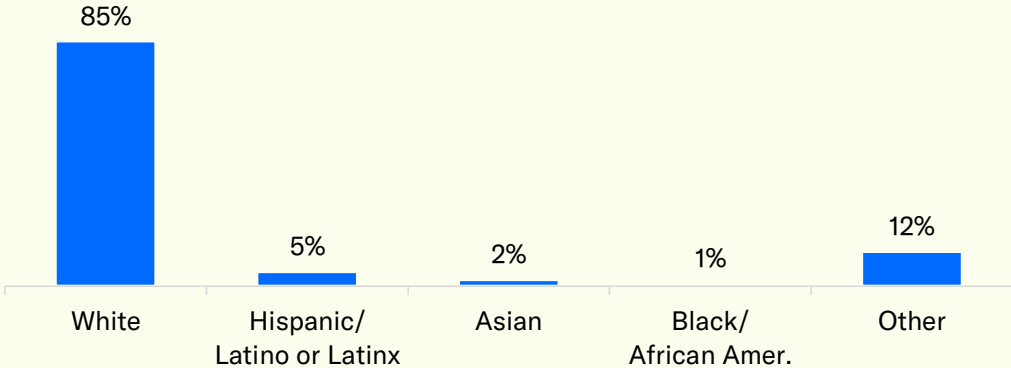


Future Partners

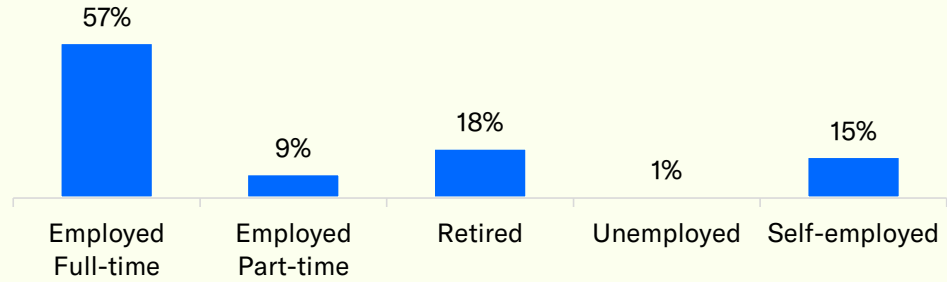
Demographics

Total Respondents

Ethnicity



Employment Status



Future Partners