

MAMMOTH LAKES TOURISM
SUMMER AIR SURVEY
2023



SEPTEMBER 2023

2023 SUMMER AIR VISITOR PROFILE



OBJECTIVE: PROVIDE A CURRENT PROFILE OF THE SUMMER AIR VISITOR

Intercepts were conducted at the Eastern Sierra Regional Airport/Bishop 7/25/2022 – 9/4/2023

NOTE: Sample size under 75 is considered small and information should only be used as a guide. Small sample sizes are noted with an asterisk *

SAMPLE SIZE

289 TOTAL

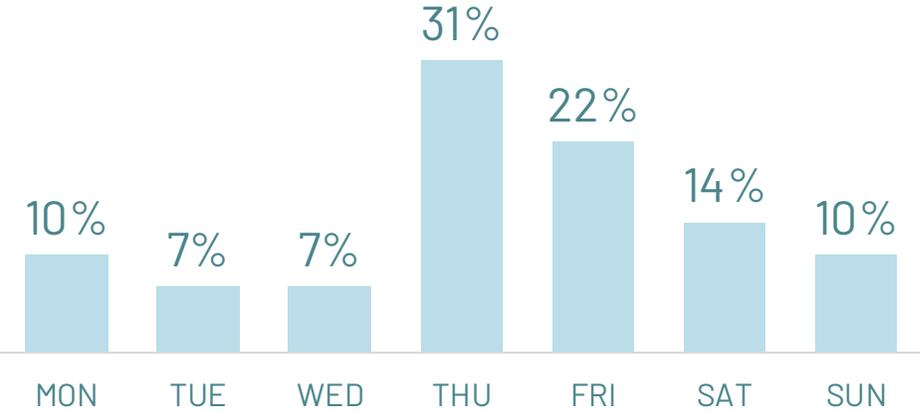
123 LOCALS
166 VISITORS

70 FIRST TIME
96 REPEAT

48 CALIFORNIA
106 OUT OF STATE
12 OUT OF US

VISITOR SURVEY COLLECTION - DAY OF ARRIVAL/DEPARTURE

36% ARRIVALS



N=55*

64% DEPARTURES



N=106

VISITOR TYPES, ORIGIN & SEASONS VISITED

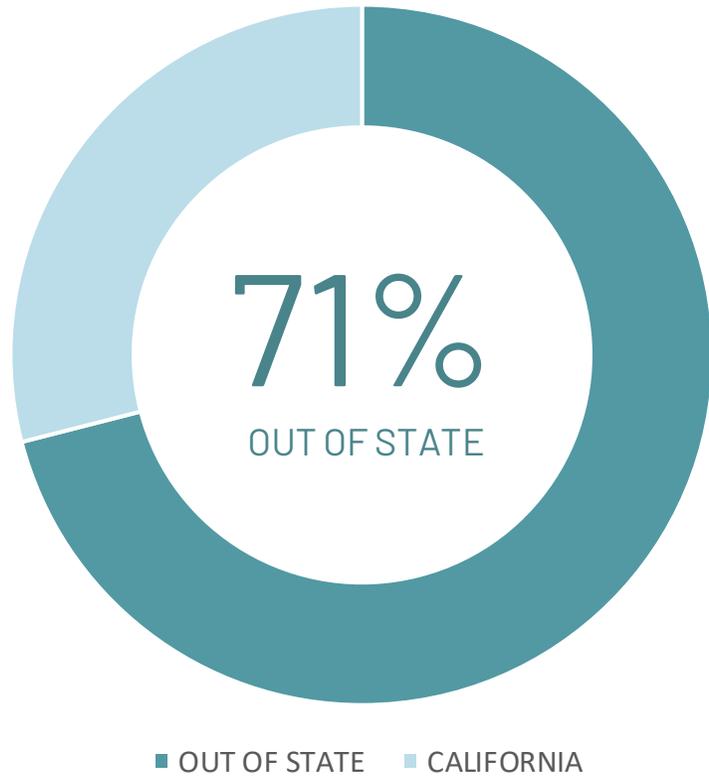


Mammoth Lakes[™]
CALIFORNIA

CALIFORNIA VS. OUT OF STATE VISITORS

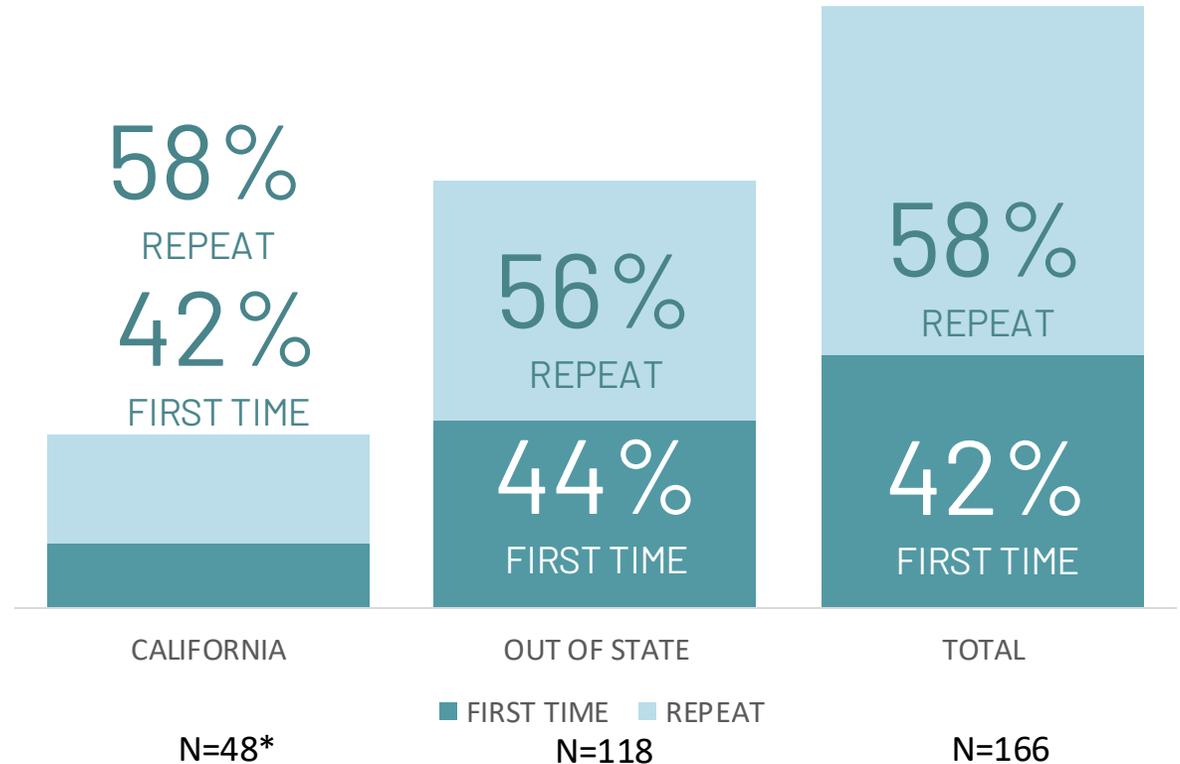


OUT OF STATE VS. CALIFORNIA



OUT OF STATE - Up 4% from 68% in 2022

REPEAT VS. FIRST TIME - OUT OF STATE & CALIFORNIA



TRAVELER TYPE TREND



2023



2022



2023



2022

CALIFORNIA	29%	32%	22%	36%
OUT OF STATE	71%	68%	78%	64%
FIRST TIME	42%	33%	53%	51%
REPEAT	58%	67%	47%	49%

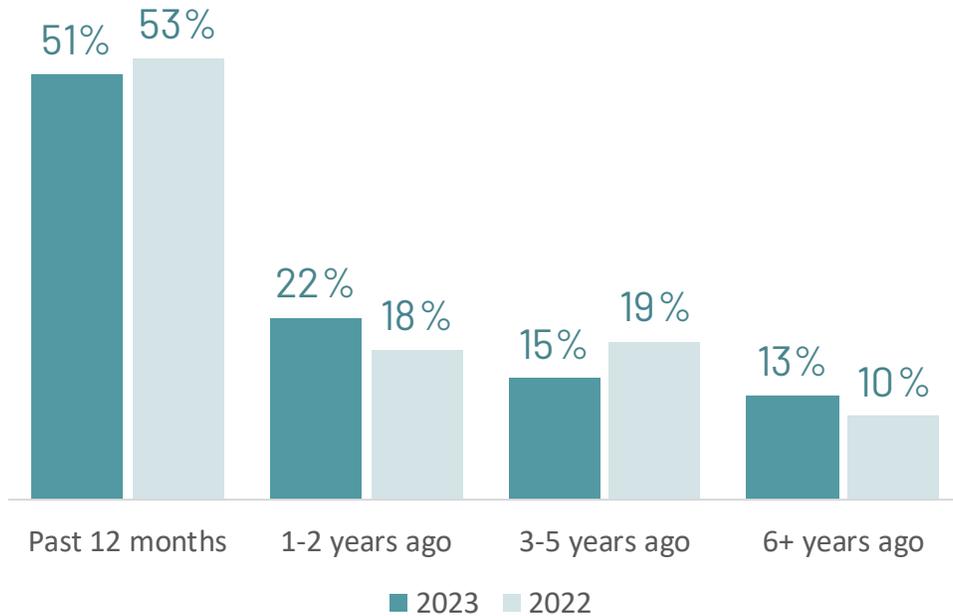
- Summer has a smaller percentage of First Time visitors when compared to Winter
- 2023 Repeat visitors are lower than Summer 2022, but still higher than Winter, both years

REPEAT VISITORS – PREVIOUS VISIT

2023 visits are up slightly but similar to 2022 (73% 2023/71% 2022) for visitation within the past 2 years

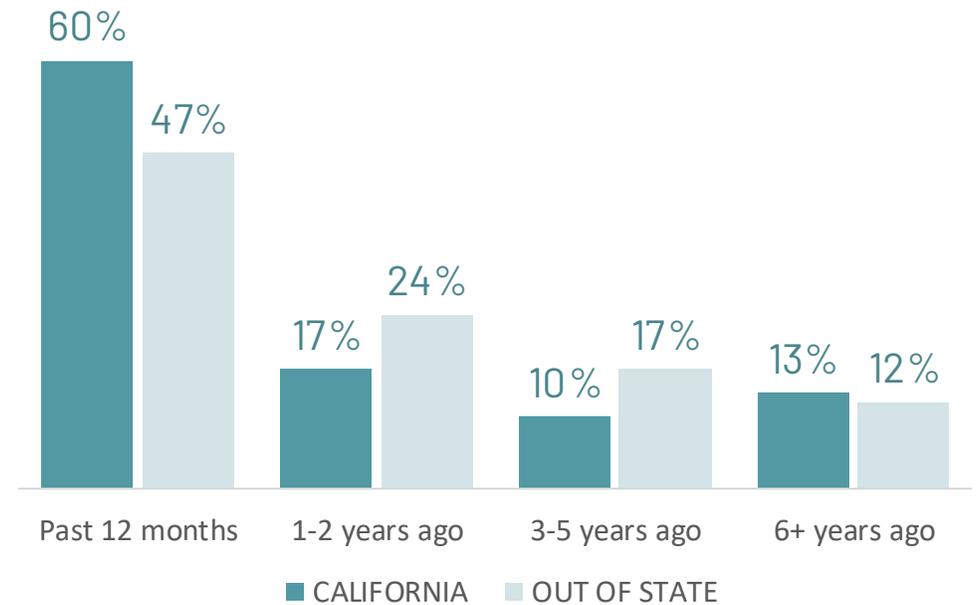


PREVIOUS VISIT 2023 VS. 2022



N=106/106

PREVIOUS VISIT CALIFORNIA VS. OUT OF STATE 2023



N=48*/118

TOP ORIGIN STATES

California	28.92%
Colorado	12.05%
INTERNATIONAL	7.23%
Illinois T	4.82%
Texas T	4.82%
Washington T	4.82%
TOP 6	62.65%
New York	4.22%
Hawaii	3.61%
Oregon	3.61%
Massachusetts	3.01%
New Jersey	3.01%
Florida	1.81%
Ohio	1.81%
Pennsylvania	1.81%
TOTAL 7-14	22.89%
TOP 14	85.54%

N=166

FIRST TIME VISITORS

California	25.71%
Washington	10.00%
Colorado T	7.14%
Massachusetts T	7.14%
INTERNATIONAL	7.14%
TOP 5	57.14%
Texas	5.71%
New York	4.29%
Oregon	4.29%
Hawaii	2.86%
Indiana	2.86%
Ohio	2.86%
Pennsylvania	2.86%
TOTAL 6-12	25.71%
TOP 12	82.86%

N=70

REPEAT VISITORS

California	31.25%
Colorado	15.63%
Illinois	8.33%
INTERNATIONAL	7.29%
Hawaii	4.17%
TOP 5	66.67%
New Jersey	4.17%
New York	4.17%
Texas	4.17%
Oregon	3.13%
Arizona	2.08%
Florida	2.08%
New Hampshire	2.08%
TOTAL 6-12	21.88%
TOP 12	88.54%

N=96

OUT-OF-STATE VISITORS

Colorado	16.95%
INTERNATIONAL	10.17%
Illinois T	6.78%
Texas T	6.78%
Washington T	6.78%
TOP 5	47.46%
New York	5.93%
Hawaii	5.08%
Oregon	5.08%
Massachusetts	4.24%
New Jersey	4.24%
Florida	2.54%
Ohio	2.54%
Pennsylvania	2.54%
TOTAL 6-13	32.20%
TOP 13	79.66%

N=118

TOP 5 TRAVELER ORIGIN STATES – TREND

Summer state origins are inconsistent by year



2023

California	28.9%
Colorado	12.1%
International	7.2%
Illinois T	4.8%
Texas T	4.8%
Washington T	4.8%
TOP 6	62.7%



2023

California	32.3%
Colorado	8.9%
Washington	7.6%
Illinois	6.3%
Oregon	5.1%
TOP 5	60.2%



2023

California	22.0%
Colorado	13.0%
New York	6.4%
Massachusetts	5.2%
Texas	4.8%
TOP 5	51.3%



2022

California	35.8%
Colorado	16.2%
New York	5.4%
Texas	3.7%
N. Carolina	3.0%
TOP 5	64.1%

SUMMER REPEAT VISITORS – OTHER SEASONS PAST VISITS

Summer California Visitors more likely to also visit in Winter



TOTAL REPEAT VISITORS

25% 20% 21%



winter



spring



autumn

N=96

CALIFORNIA REPEAT VISITORS

31% 22% 21%



winter



spring



autumn

N=30*

OUT-OF-STATE REPEAT VISITORS

22% 19% 21%



winter



spring



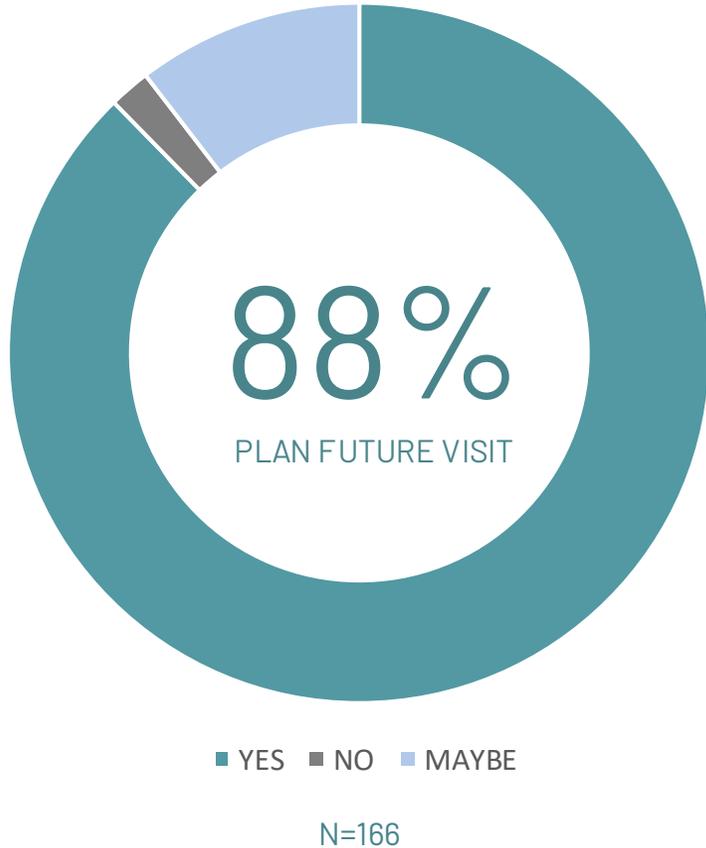
autumn

N=66*

BASE: Have visited ML in other seasons

PLANNED FUTURE VISITS – Very High

Repeat & First Time Visitors have the highest intention to visit again



FIRST TIME VISITORS



REPEAT VISITORS



CALIFORNIA VISITORS



OUT-OF-STATE VISITORS

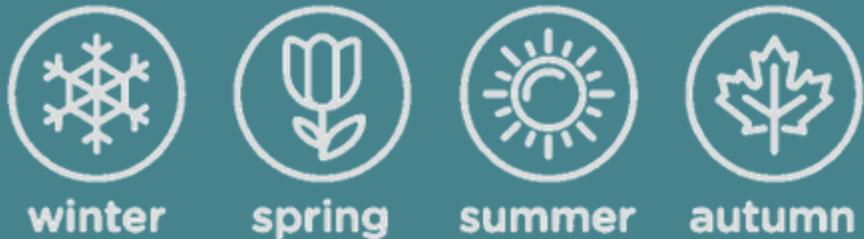


FUTURE SEASON VISITS (OF THOSE CONSIDERING FUTURE VISITS)

Summer is the highest season visitors would return for future visits



23% 16% 38% 21%



2.2 FUTURE SEASONS

N=104

FIRST TIME VISITORS

25% 14% 41% 18%



2.0 FUTURE SEASONS

N=46*

CALIFORNIA VISITORS

22% 19% 36% 21%



2.4 FUTURE SEASONS

N=24*

REPEAT VISITORS

22% 18% 36% 23%



2.4 FUTURE SEASONS

N=58*

OUT-OF-STATE VISITORS

24% 16% 39% 21%



2.1 FUTURE SEASONS

N=79

VISITOR EXPERIENCE



Mammoth Lakes[™]
CALIFORNIA

UNITED FLIGHT EXPERIENCE RATING



■ 0-6 ■ 7-8 ■ 9-10
53.61
(POSITIVE - NEGATIVE)
N=166

Down from 63.35 Summer 2022
NEGATIVE COMMENTS:
Flight delays, lost luggage, turbulence

FIRST - TIME VISITORS

50.00
N=70*

REPEAT VISITORS

56.25
N=96

CALIFORNIA VISITORS

56.25
N=48*

OUT-OF-STATE VISITORS

52.55
N=81

MAMMOTH LAKES EXPERIENCE RATING



75.47
(POSITIVE-NEGATIVE)
N=106

Down from 92.73 Summer 2022
Only 2 negative comments based on lack of accommodations during a holiday weekend

FIRST TIME VISITORS

65.22
N=46*

REPEAT VISITORS

83.33
N=60

CALIFORNIA VISITORS

64.00
N=25*

OUT-OF-STATE VISITORS

79.01
N=81

OVERALL MAMMOTH COMMENTS



POSITIVE

- Spectacular scenery. My first time in the area. Absolutely loved it.
- It was awesome very welcoming and beautiful scenery.
- Hiked the John Muir Trail... adventure of a lifetime!
- Amazing scenery, people, food, and experience!
- Beautiful locations, I enjoyed reconnecting with nature

NEGATIVE - TRANSPORTATION

- Taxi companies needs more competition. Outrageous prices. I wish EST would do dial-a-ride to trailheads.
- Transportation between Mammoth Mountain Inn and the town could be better at night
- Enterprise Rental Car needs work
- Transportation between Mammoth Mountain Inn and the town could be better at night
- The public transportation didn't run today, so getting a ride to the airport was challenging.
- ESTA shuttle buses should coincide with flight arrivals and departures

AIR SERVICE

- Need more flights into Mammoth and Bishop
- Wish there were more flights all year long
- Loved being able to fly into Mammoth to complete the John Muir trail
- More than one flight a day would be great!
- Love the flight from SFO to Bishop. Hope it stays year around
- Love the airport access, makes traveling to and from much easier

VISITOR TRIP PROFILE



Mammoth Lakes[™]
CALIFORNIA

PRIMARY TRIP PURPOSE

Outdoor adventure activities	48.80%
Visiting friends or family	24.10%
Work/Business	7.83%
Other outdoor activities	6.02%
Enjoy nature	3.61%
Attending a wedding	3.01%
Festivals and events	2.41%
Fishing	1.81%
Other	1.81%
Water activities	0.00%
Sporting event	0.00%

N*166

N=166

Outdoor adventure activities – Rock climbing, backpacking, mountain biking, bouldering etc.

Other outdoor activities – horseback riding, biking, hiking, running etc.

Enjoy nature – nature walks, wildlife watching, visiting geological formations unique to the area, etc.

Attending festivals and events (music, food, arts, health & wellness etc.)

Water activities – kayaking, canoeing, boating, swimming, etc.

FIRST TIME VISITORS

Outdoor adventure activities	50.00%
Visiting friends or family	18.57%
Work/Business	8.57%
Attending a wedding	7.14%
Other outdoor activities	5.71%
Other	4.29%
Enjoy nature	2.86%
Fishing	1.43%
Festivals and events	1.43%
Water activities	0.00%
Sporting event	0.00%

N=70

CALIFORNIA VISITORS

Outdoor adventure activities	39.58%
Visiting friends or family	20.83%
Enjoy nature	8.33%
Work/Business	8.33%
Other outdoor activities	6.25%
Festivals and events	6.25%
Fishing	4.17%
Other	4.17%
Attending a wedding	2.08%
Water activities	0.00%
Sporting event	0.00%

N=48*

REPEAT VISITORS

Outdoor adventure activities	47.92%
Visiting friends or family	28.13%
Work/Business	7.29%
Other outdoor activities	6.25%
Enjoy nature	4.17%
Festivals and events	3.13%
Fishing	2.08%
Attending a wedding	1.04%
Water activities	0.00%
Sporting event	0.00%

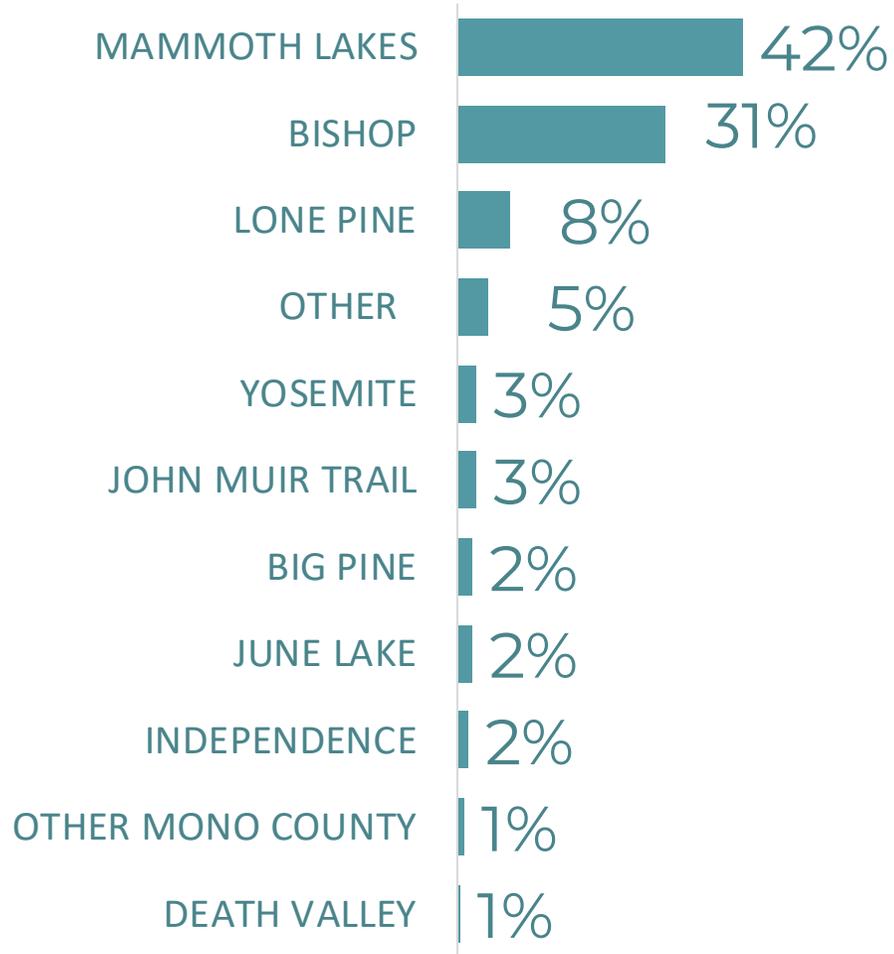
N=96

OUT OF STATE VISITORS

Outdoor adventure activities	52.54%
Visiting friends or family	25.42%
Work/Business	6.78%
Other outdoor activities	5.93%
Attending a wedding	4.24%
Enjoy nature	1.69%
Other outdoor activities	1.69%
Fishing	0.85%
Festivals and events	0.85%
Water activities	0.00%
Sporting event	0.00%

N=118

PRIMARY DESTINATION



N=166

FIRST TIME VISITORS

40%

MAMMOTH LAKES

36%

BISHOP

N=70*

REPEAT VISITORS

44%

MAMMOTH LAKES

27%

BISHOP

N=96

CALIFORNIA VISITORS

42%

MAMMOTH LAKES

33%

BISHOP

N=48*

OUT-OF-STATE VISITORS

42%

MAMMOTH LAKES

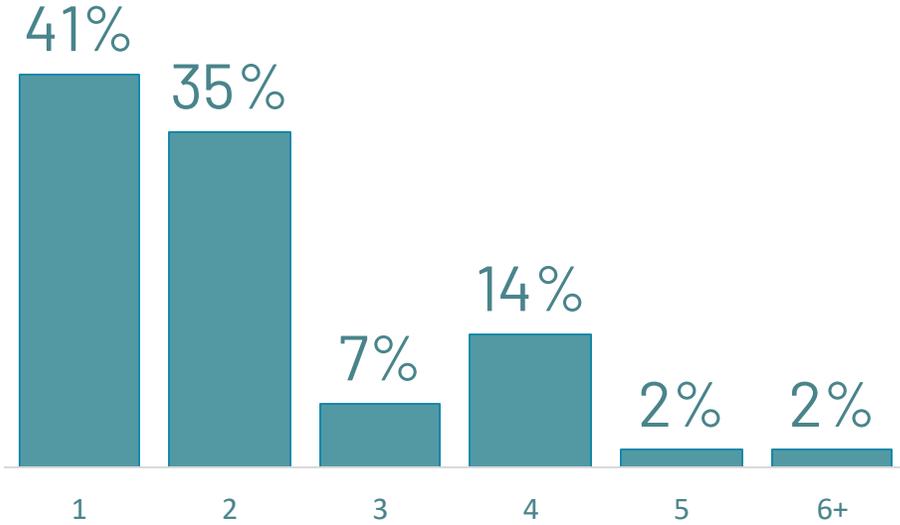
34%

BISHOP

N=81

PARTY SIZE

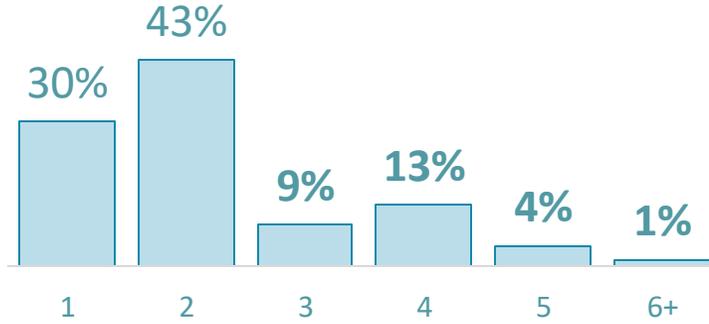
TOTAL



2.1 AVG. PARTY SIZE 2023
1.9 AVG. PARTY SIZE 2022

N=166

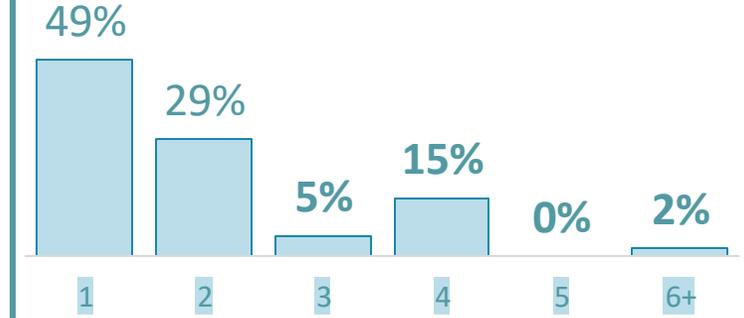
FIRST TIME VISITORS



2.2 AVG. PARTY SIZE 2023

N=70*

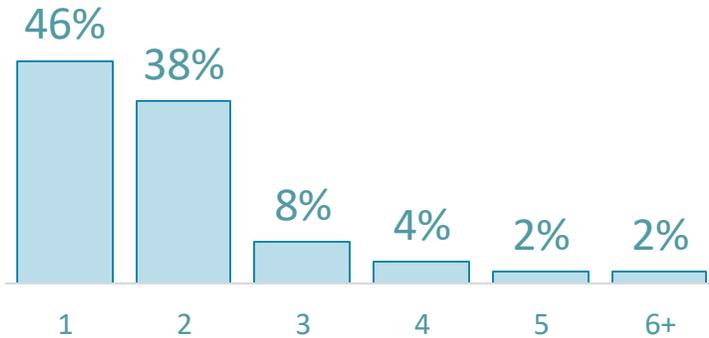
REPEAT VISITORS



1.9 AVG. PARTY SIZE 2023

N=96

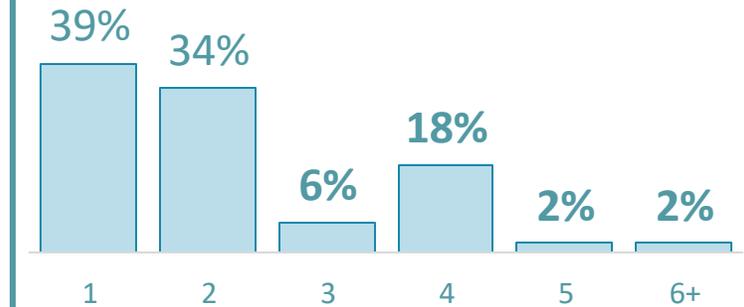
CALIFORNIA VISITORS



1.9 AVG. PARTY SIZE 2023

N=48*

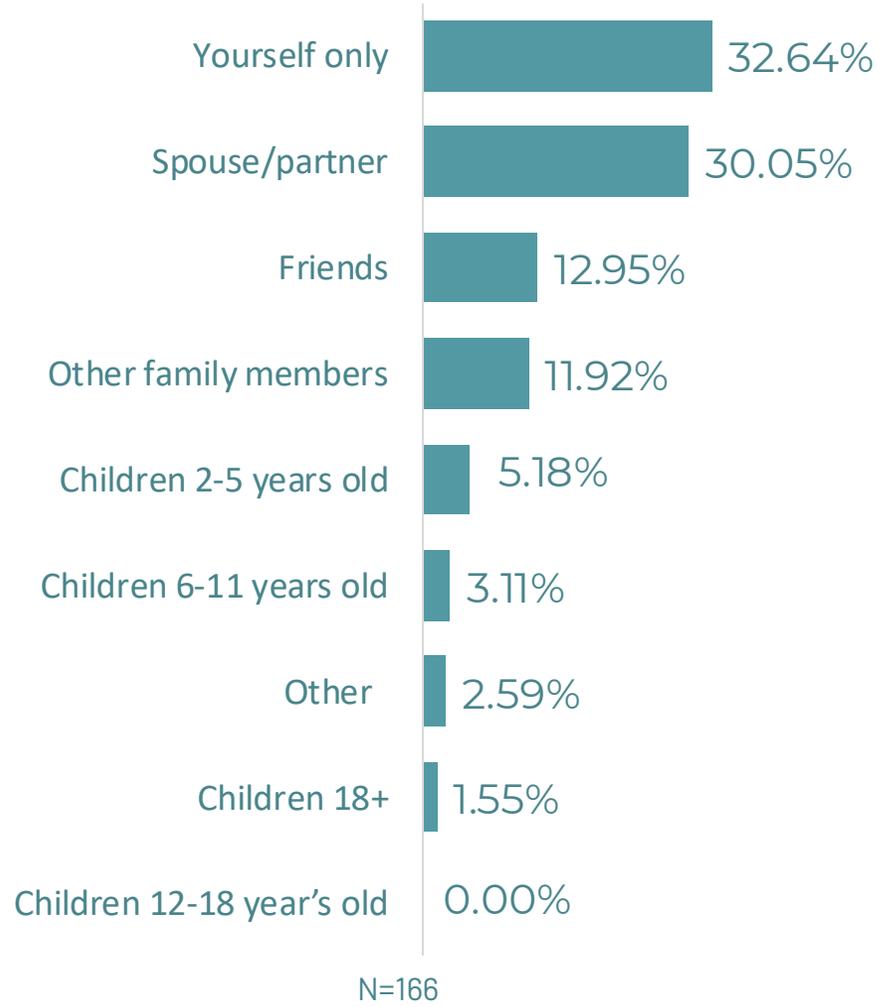
OUT-OF-STATE VISITORS



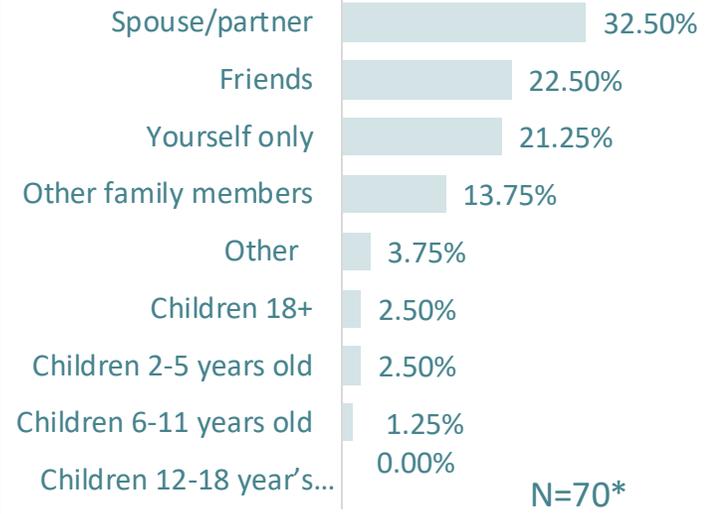
2.1 AVG. PARTY SIZE 2023

N=81

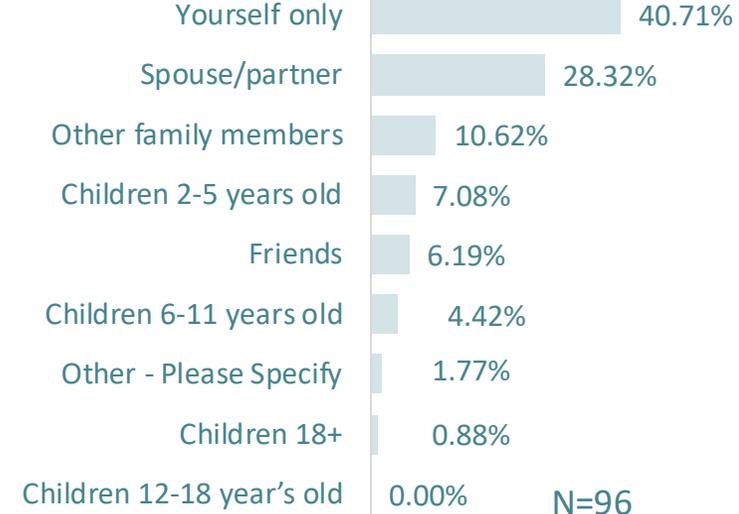
TRAVEL COMPANIONS



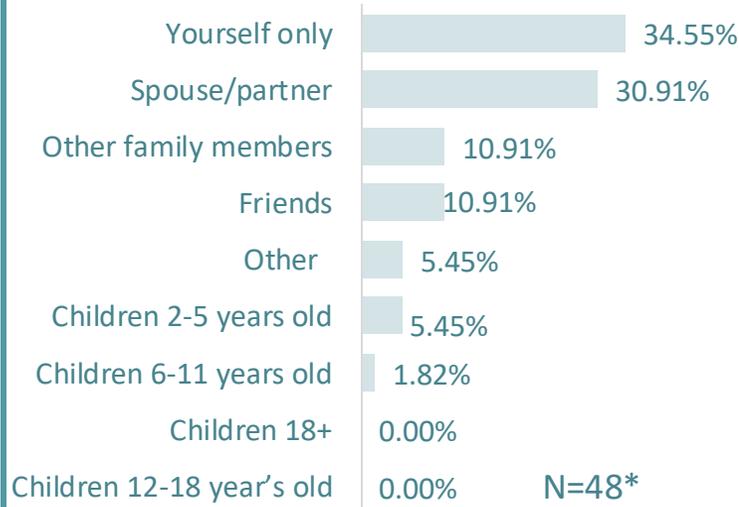
FIRST TIME VISITORS



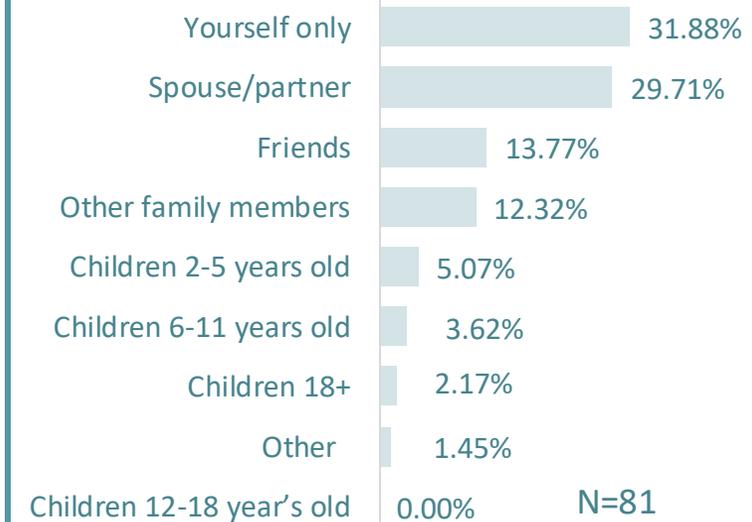
REPEAT VISITORS



CALIFORNIA VISITORS

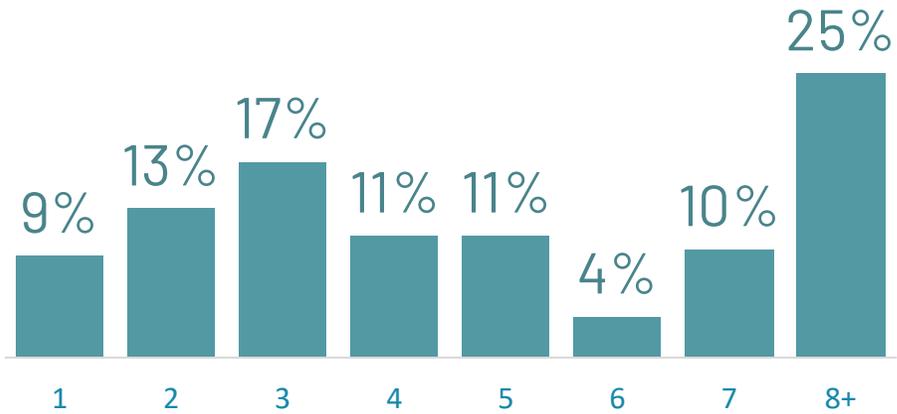


OUT-OF-STATE VISITORS



AVERAGE # NIGHTS REMAINED THE SAME AS 2022

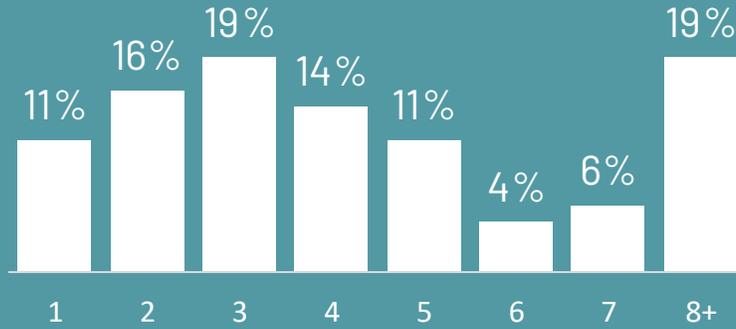
TOTAL



4.77 AVG. # NIGHTS 2023
4.8 AVG. # NIGHTS 2022

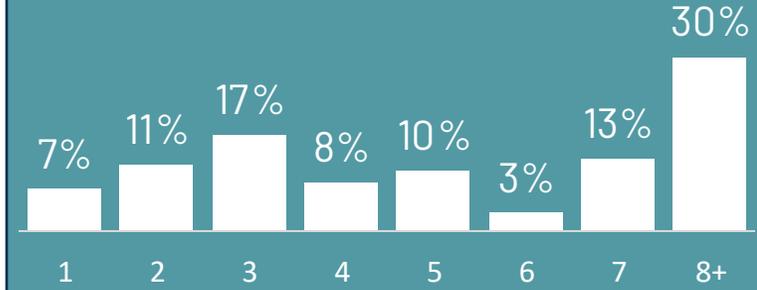
N=166

FIRST TIME VISITORS



4.27 AVG. # NIGHTS 2023
N=70*

REPEAT VISITORS



5.14 AVG. # NIGHTS 2023
N=96

CALIFORNIA VISITORS



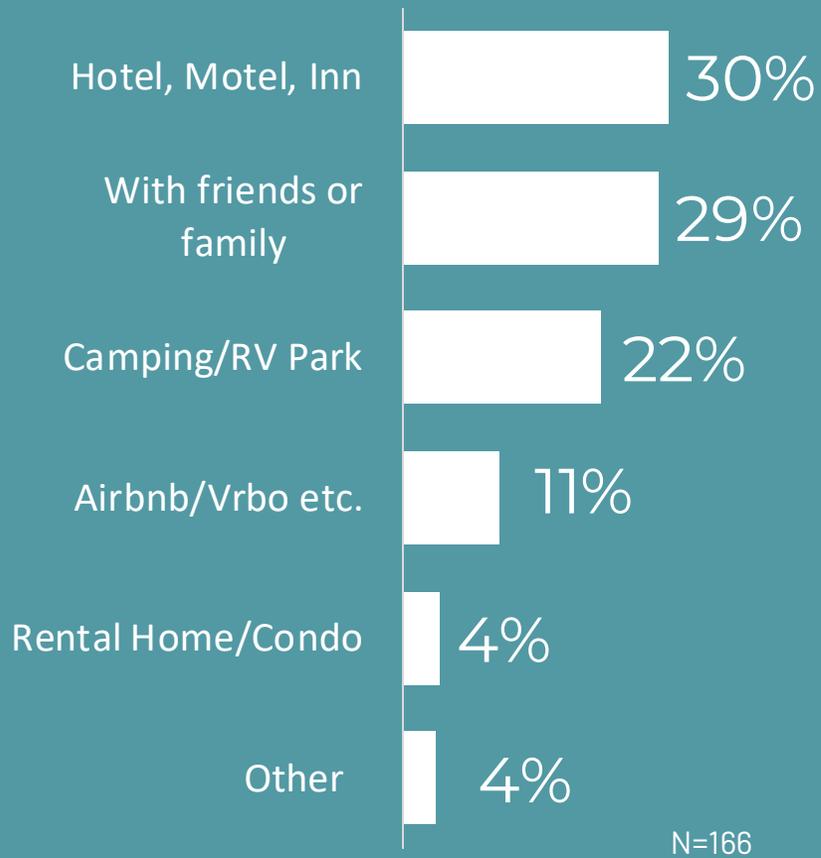
3.69 AVG. # NIGHTS 2023
N=48*

OUT-OF-STATE VISITORS



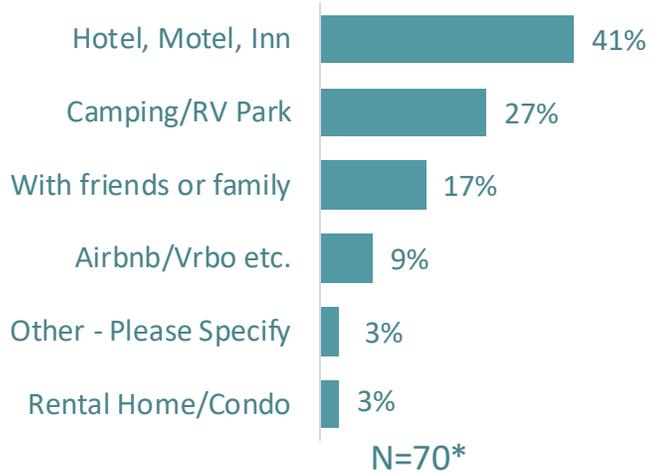
5.21 AVG. # NIGHTS 2023
N=81

ACCOMMODATIONS

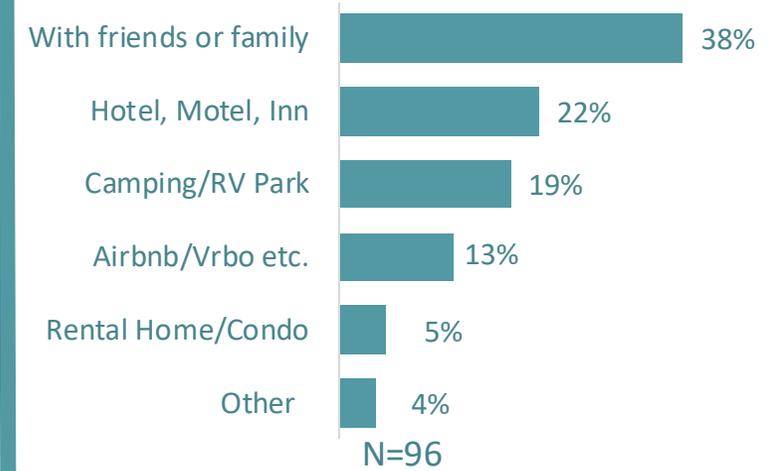


- First Time visitors we the highest for hotel, Motel, Inn
- Repeat visitors were the highest for visit friends & family

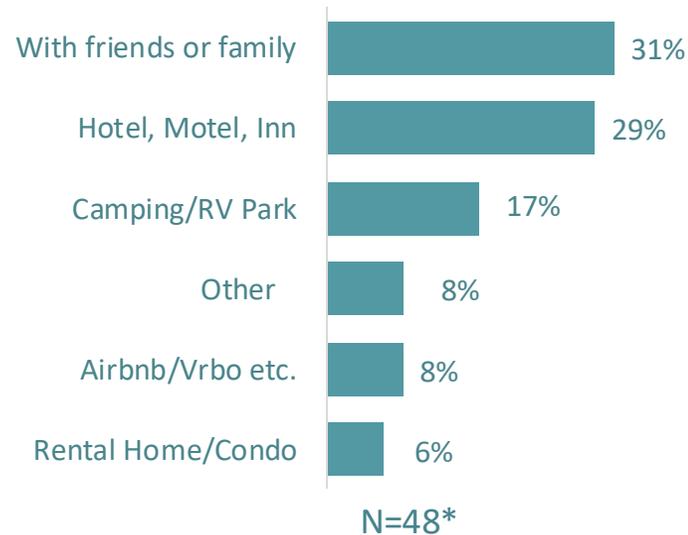
FIRST TIME VISITORS



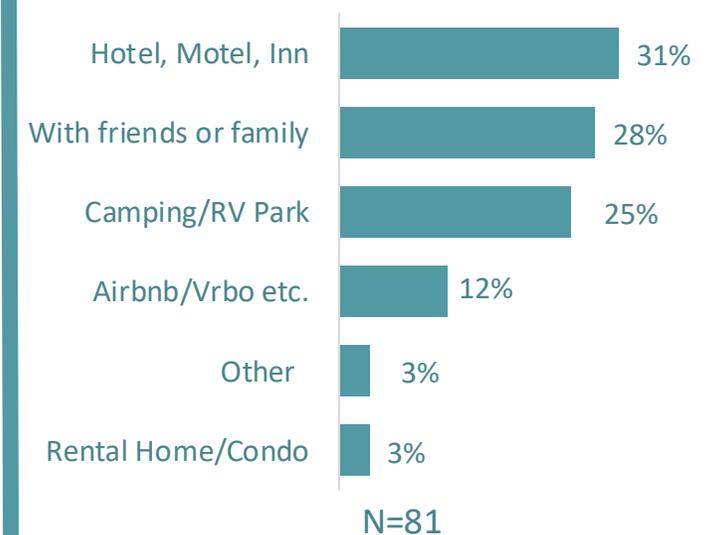
REPEAT VISITORS



CALIFORNIA VISITORS



OUT-OF-STATE VISITORS



TRIP PROFILE TREND



	 2023	 2023	 2023	 2022
MAMMOTH PRIMARY DESTINATION	42%	51%	85%	79%
PARTY SIZE	2.1	1.9	2.5	2.5
AVG. # NIGHTS	4.8	4.8	4.6	4.2
HOTEL, MOTEL, INN	30%	27%	32%	30%
FRIENDS/FAMILY	29%	40%	30%	28%

LOCAL TRANSPORTATION



FROM AIRPORT

Friend's or Family's vehicle	46%
Rental Car	25%
Shuttle Service	17%
Taxi	5%
Other	5%
Uber/Lyft	1%

N=166

IN-TOWN

Friend's or Family's vehicle	46%
Rental Car	23%
Shuttle Service	11%
Other-Please specify	8%
Free Town Shuttle (Mammoth Lakes)	7%
Taxi	3%
Uber/Lyft	1%

VISITOR SPENDING

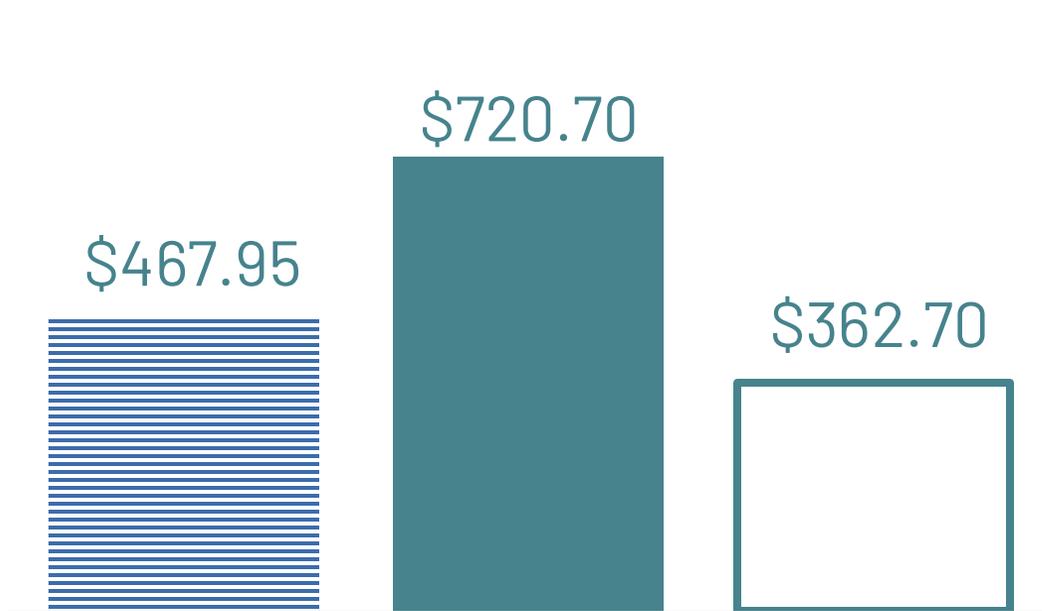


Mammoth Lakes[™]
CALIFORNIA

TRIP SPENDING

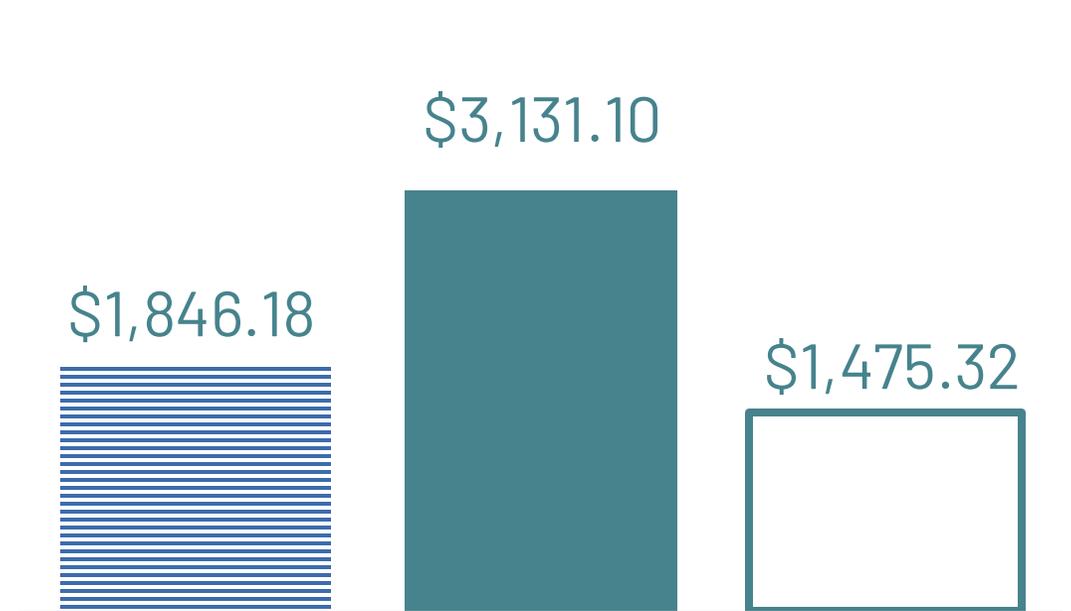


AVG. SPENDING/DAY



■ TOTAL ■ LODGING ■ NO LODGING

AVG. SPENDING/STAY



■ TOTAL ■ LODGING ■ NO LODGING

N=117 TOTAL, 73 LODGING, 44 NO LODGING

SPENDING/DAY DETAIL



TOTAL \$
PER DAY



LODGING



RESTAURANTS



RETAIL



SIGHTSEEING
ENTERTAINMENT



CAR RENTAL



GAS, PARKING
TRANSPORTATION



	TOTAL \$ PER DAY	LODGING	RESTAURANTS	RETAIL	SIGHTSEEING ENTERTAINMENT	CAR RENTAL	GAS, PARKING TRANSPORTATION	OTHER
TOTAL	\$ 467.95	\$ 152.13	\$ 115.76	\$ 68.49	\$ 38.49	\$ 28.35	\$ 41.83	\$ 22.94
LODGING	\$ 720.70	\$319.70	\$ 161.80	\$ 66.50	\$ 44.00	\$ 47.40	\$ 59.70	\$ 21.50
NO LODGING	\$ 362.70	\$ 0.00	\$120.66	\$102.27	\$ 46.48	\$ 24.09	\$ 41.48	\$ 27.73

N=117 TOTAL, 73 LODGING, 44 NO LODGING

VISITOR DEMOGRAPHICS



Mammoth Lakes[™]
CALIFORNIA

DEMOGRAPHIC TREND

Male skew, Income similar, Older this summer, Not diverse

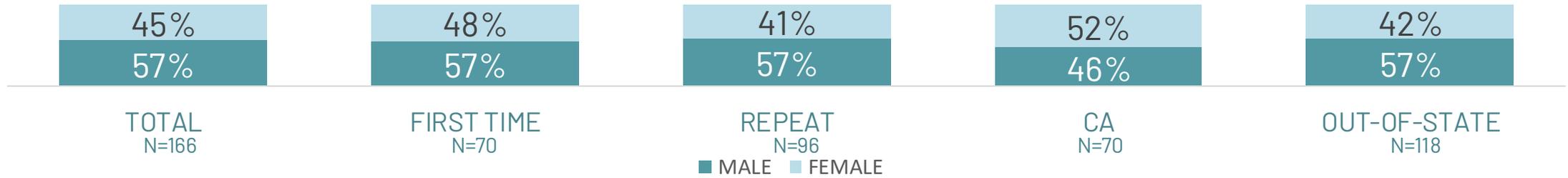


	 2023	 2023	 2023	 2022
% MALE/FEMALE	57%/45%	51%/47%	58%/41%	54%/45%
SINGLE/MARRIED	39%/55%	41%/53%	47%/44%	N/A
AVG. HH INCOME	\$169.1K	\$150.4K	\$165.4K	\$159.7K
GEN Z	8%	13%	15%	13%
MILLENNIAL	55%	44%	48%	59%
GEN X	14%	22%	19%	18%
BOOMERS	22%	19%	17%	10%
CAUCASION	85%	83%	86%	80%
HISPANIC	6%	5%	2%	3%
BLACK/AA	1%	3%	1%	1%
ASIAN	4%	6%	7%	13%
OTHER	5%	3%	2%	2%

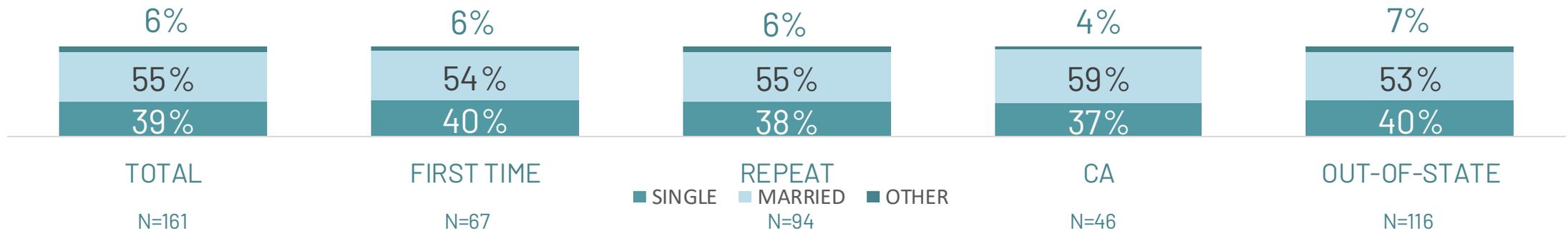
DEMOGRAPHICS



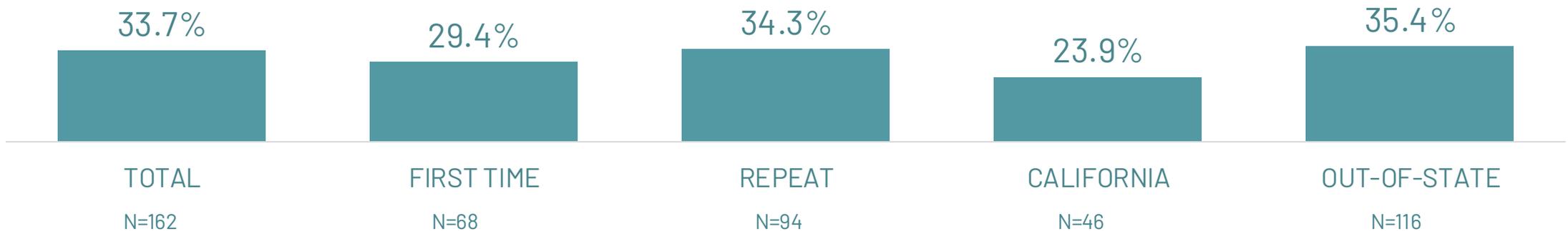
GENDER



MARITAL STATUS



CHILDREN IN HOUSEHOLD



DEMOGRAPHICS AVG. HH INCOME

\$169.1K

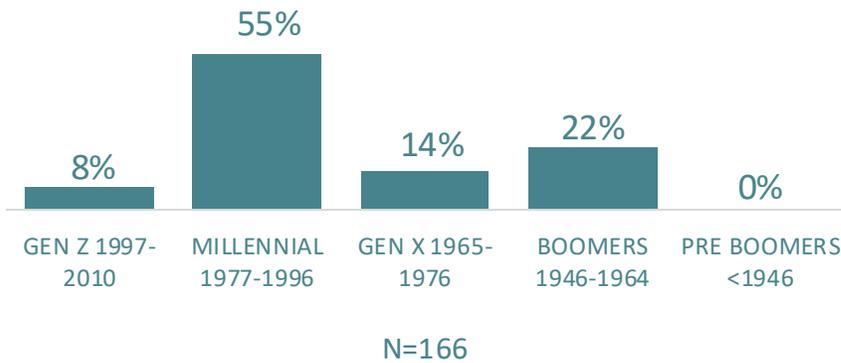
N*117



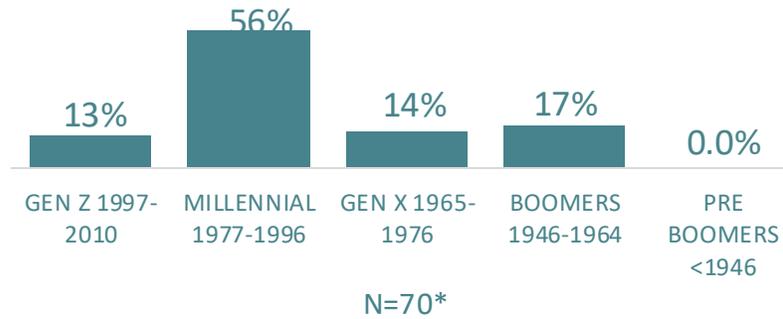
DEMOGRAPHICS



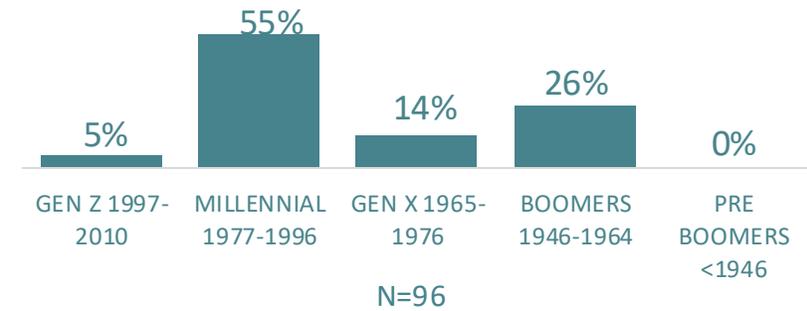
TOTAL GENERATION



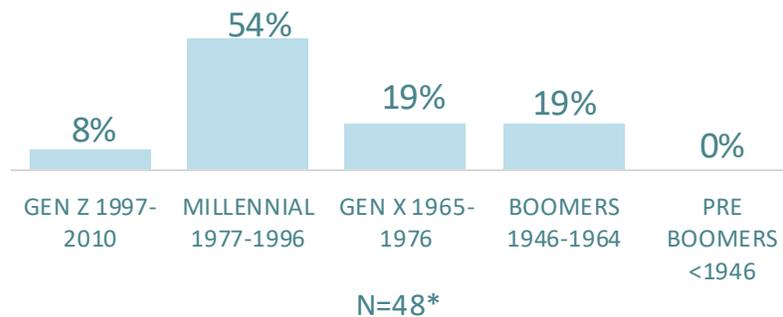
FIRST TIME



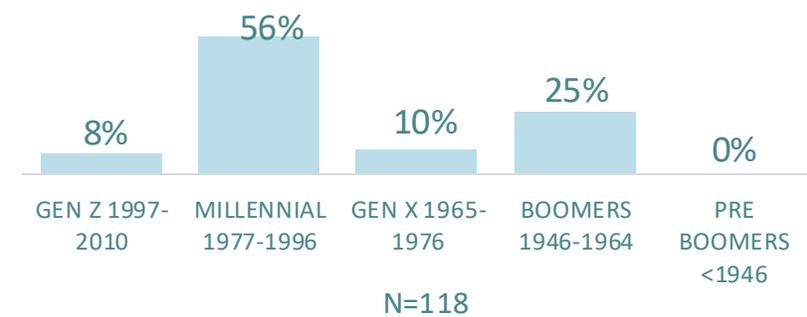
REPEAT



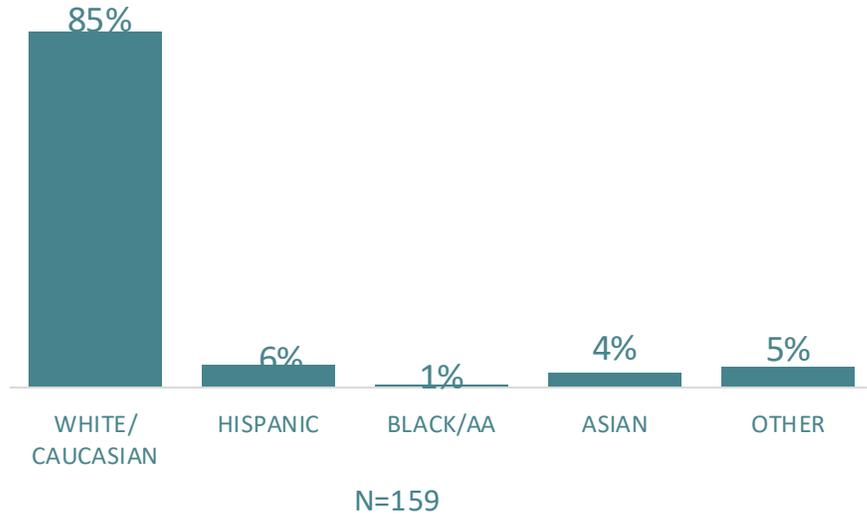
CALIFORNIA



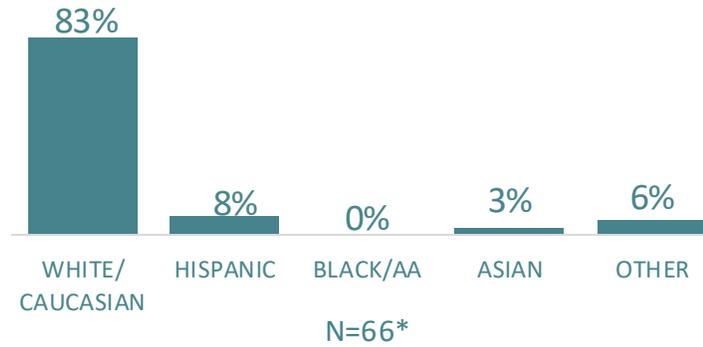
OUT OF STATE



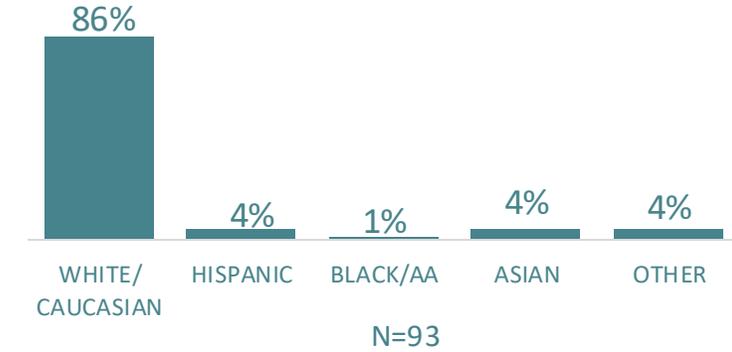
DEMOGRAPHICS



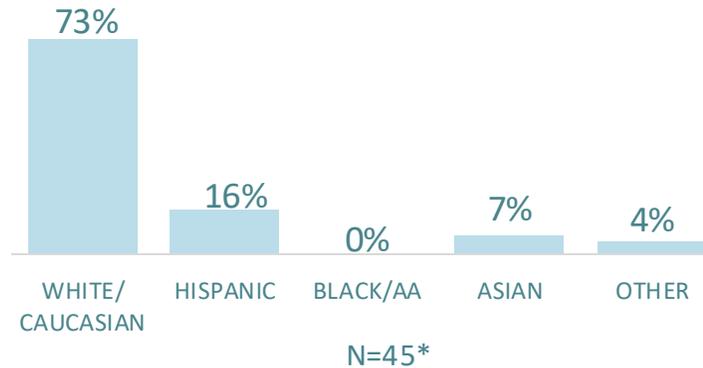
FIRST TIME VISITORS



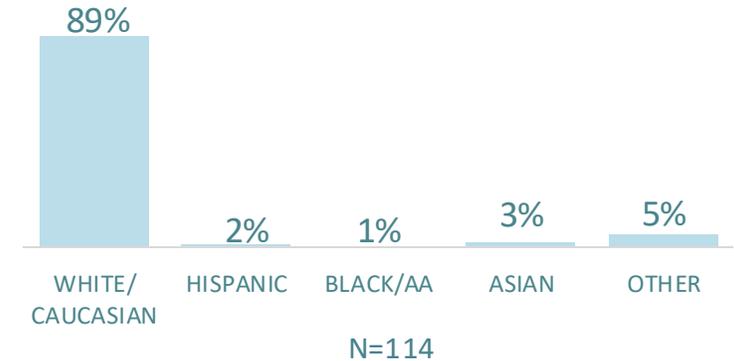
REPEAT VISITORS



CALIFORNIA VISITORS



OUT-OF-STATE VISITORS



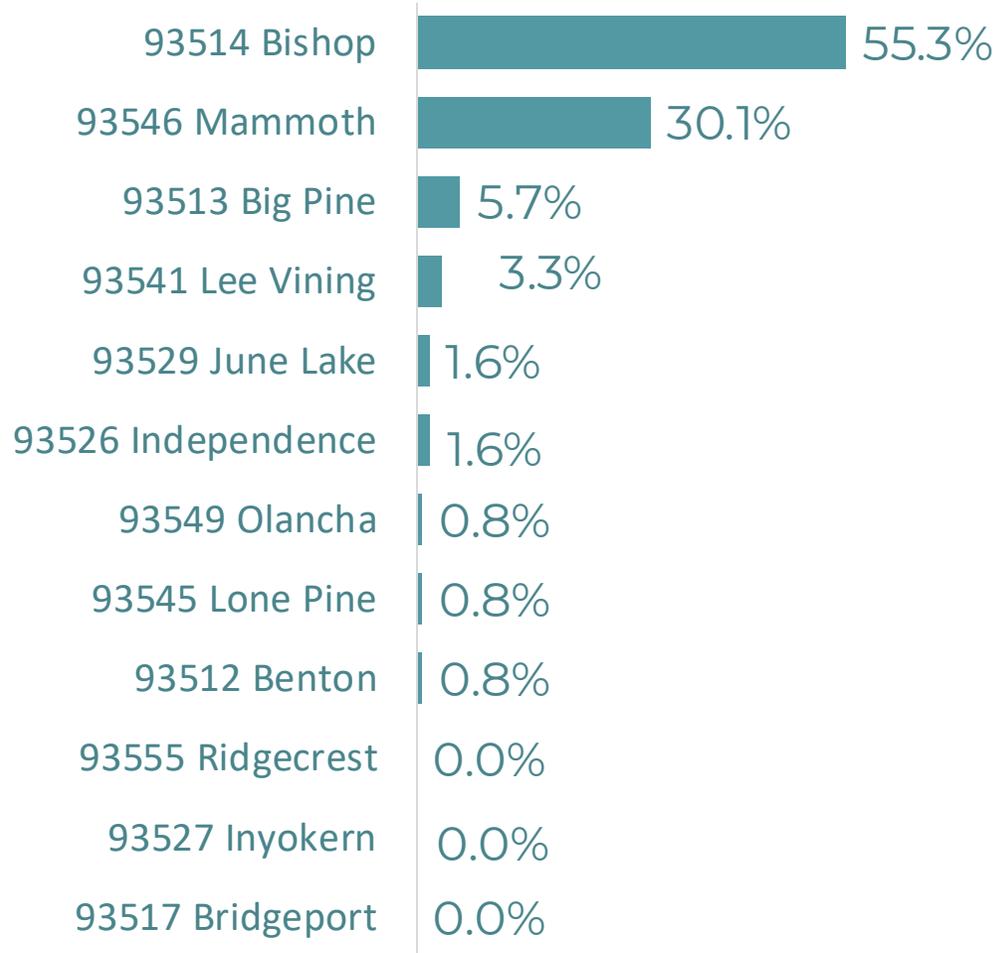
EASTERN SIERRA REGIONAL AIRPORT & BISHOP

LOCALS & VISITORS



Mammoth Lakes[™]
CALIFORNIA

LOCAL ZIP CODES



N=123

28%

FIRST TIME USING BIH

N=34*

72%

TRIPS PAST YR

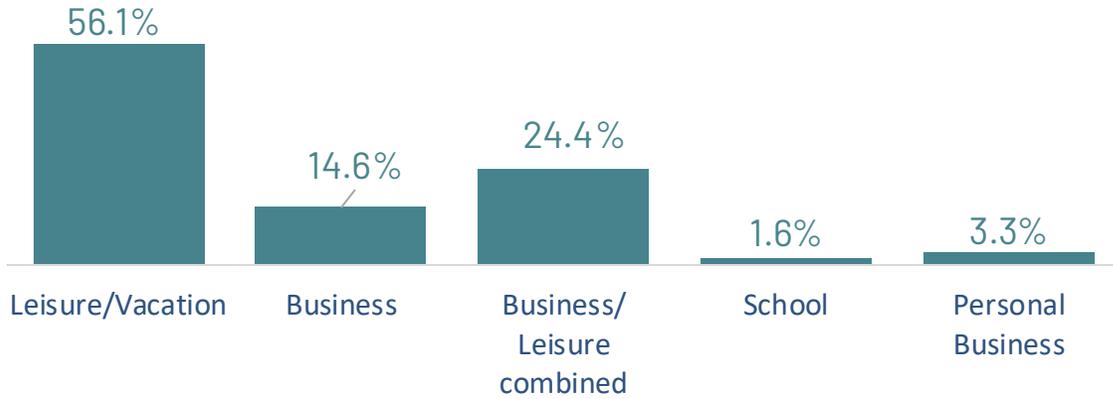
18% 1X/YR
36% 2-3X/YR
27% 3-5X/YR
19% 6+X/YR

N=89

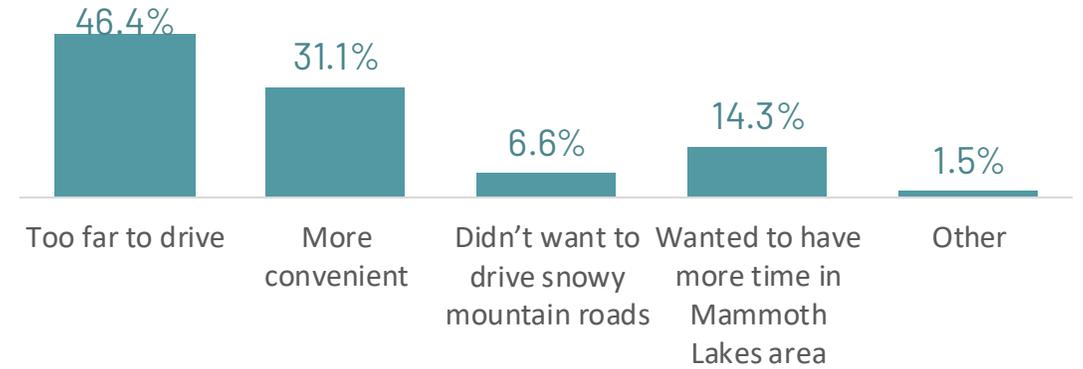
LOCALS



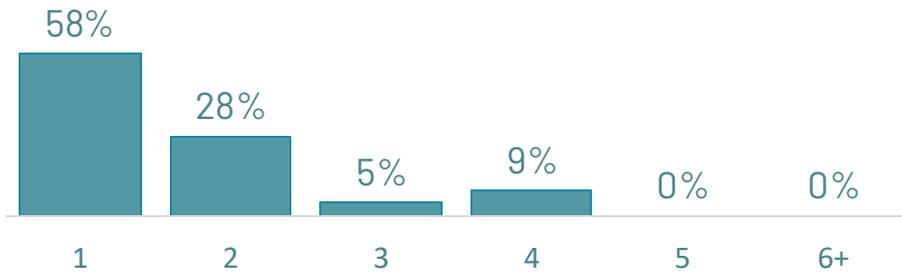
TRIP PURPOSE



REASON FOR FLYING INSTEAD OF DRIVING



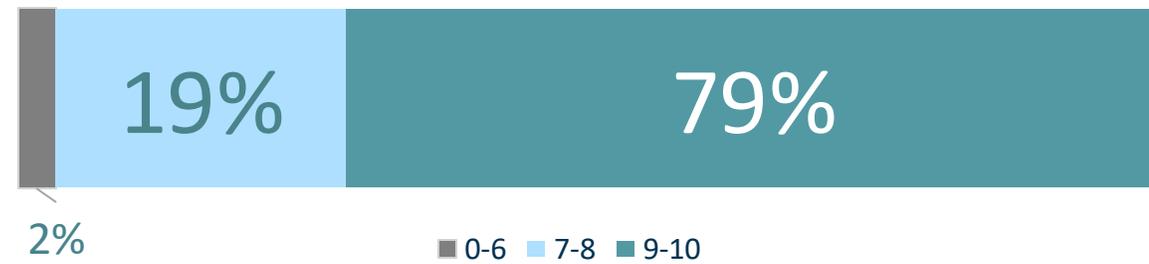
PARTY SIZE



1.65 AVG. PARTY SIZE

N=123

UNITED POSITIVE RATING



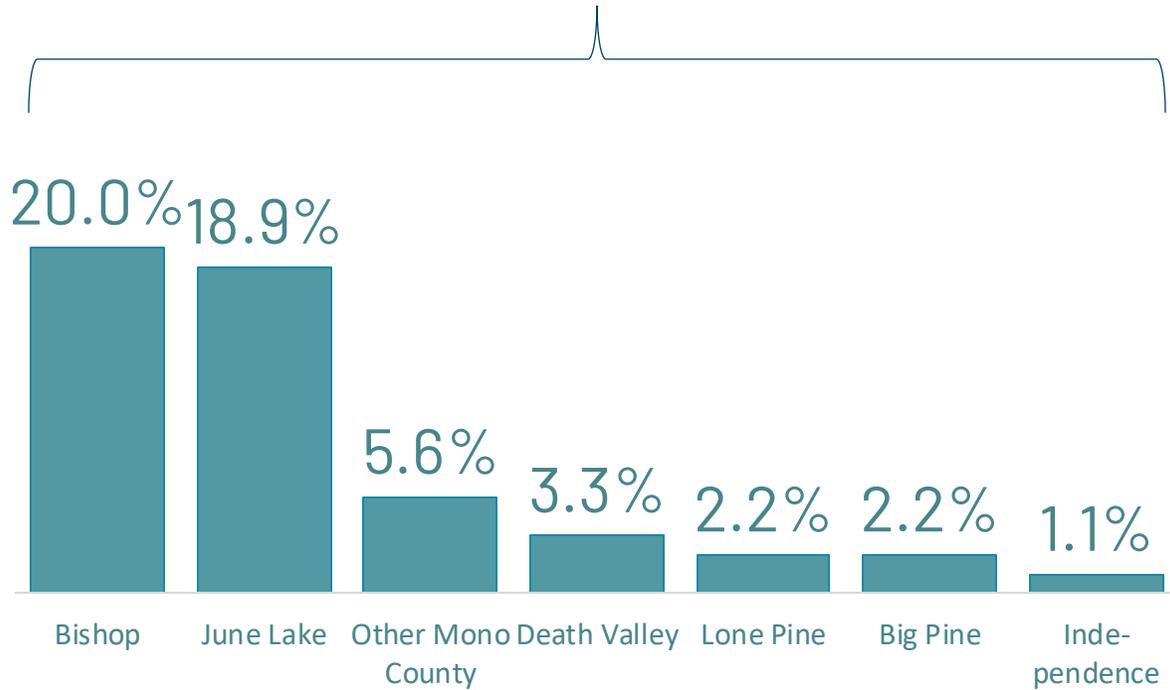
76.42
(POSITIVE - NEGATIVE)

PRIMARY MAMMOTH LAKES VISITORS

OTHER AREA DESTINATIONS & ACTIVITIES



66%



BISHOP ACTIVITIES –WILL/DID VISIT

Visit local restaurants	31%
Visit local shops	23%
Rock climbing or Bouldering	10%
Stay overnight in a hotel, motel or inn	10%
Stay overnight camping/RV Park	10%
Stay overnight in a rental Home/Condo, Airbnb/Vrbo etc.	8%
Visit a museum	3%
Other	5%

N=70*

PRIMARY BISHOP VISITORS



BISHOP ACTIVITIES –WILL/DID VISIT

Visit local restaurants	17.7%
Visit local shops	15.6%
Visit Friends & Family	14.6%
Stay overnight in a hotel, motel, or inn	11.5%
Hiking/Backpacking/fishing	10.4%
Rock climbing or Bouldering	8.3%
Stay overnight camping/RV Park	7.3%
Other	6.3%
Stay overnight in a rental Home/Condo, Airbnb/Vrbo etc.	5.2%
Visit a museum	3.1%

N=51*