



WINTER AIR SURVEY

APRIL 28, 2023



CONTENTS

1. VISITOR PROFILE

- TYPES & ORIGIN
- EXPERIENCE
- TRIP PROFILE
- DEMOGRAPHICS

2. EASTERN SIERRA REGIONAL AIRPORT & BISHOP VISITATION

3. FUTURE AIR SURVEYS

OBJECTIVE

PROVIDE A CURRENT PROFILE OF THE WINTER AIR VISITOR



VISITOR PROFILE



VISITOR SURVEY

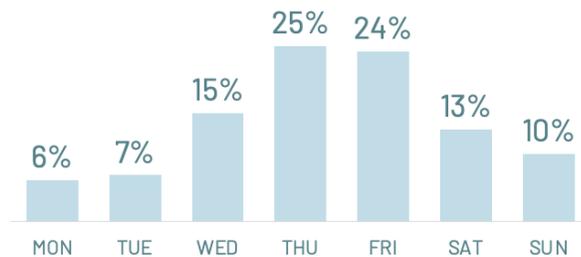


Intercepts were conducted at the Eastern Sierra Regional Airport / Bishop from December 16, 2022 to April 9, 2023.

Visitor Survey Collection

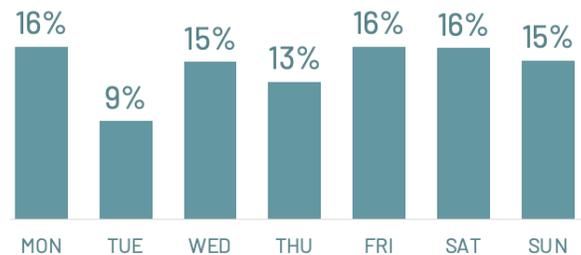
32% ARRIVALS

Day of Arrival



68% DEPARTURES

Day of Departure



Sample Size

1,732 Total Sample Size

489 Locals

1,243 Visitors

273 California

952 Out of State

18 Out of U.S.

Visitors

- 659 First-Timers

- 584 Repeat Visitors

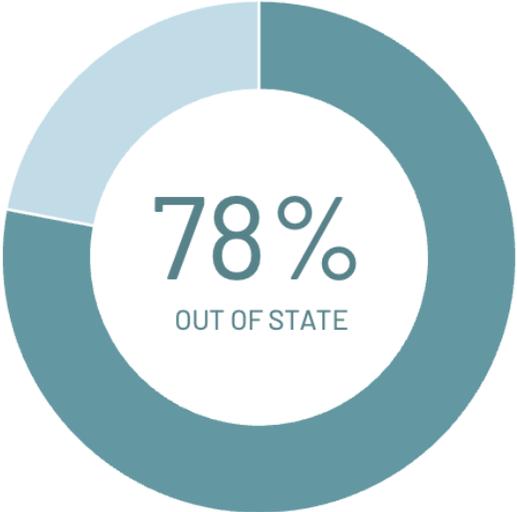
VISITOR TYPES & ORIGIN



CALIFORNIA VS. OUT OF STATE VISITORS



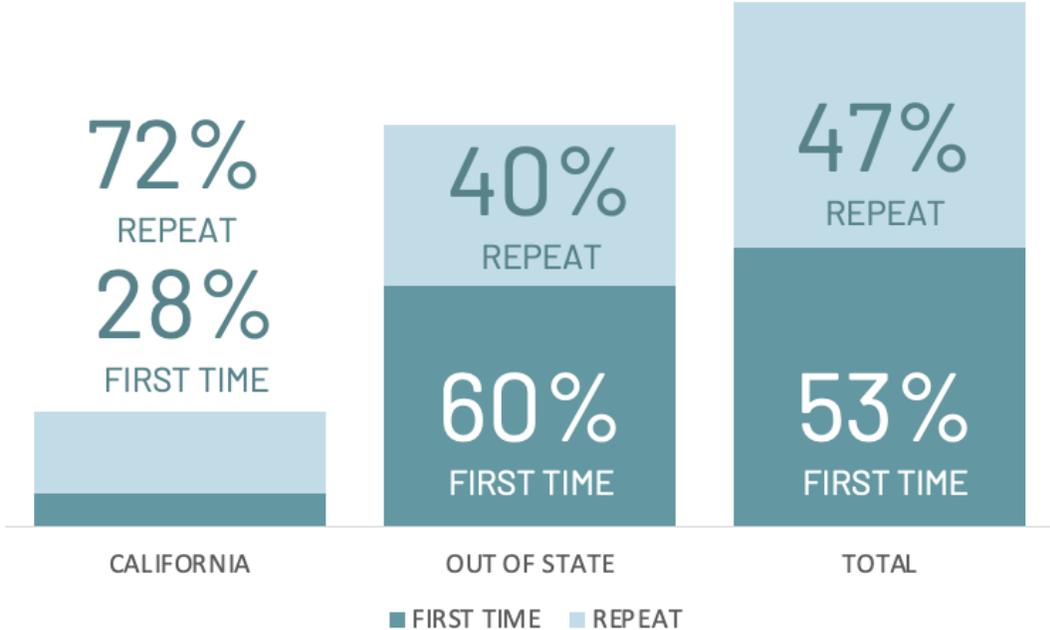
OUT OF STATE VS. CALIFORNIA



■ OUT OF STATE ■ CALIFORNIA

Up (+20%) from 65% in 2022

REPEAT VS. FIRST TIME - OUT OF STATE & CALIFORNIA

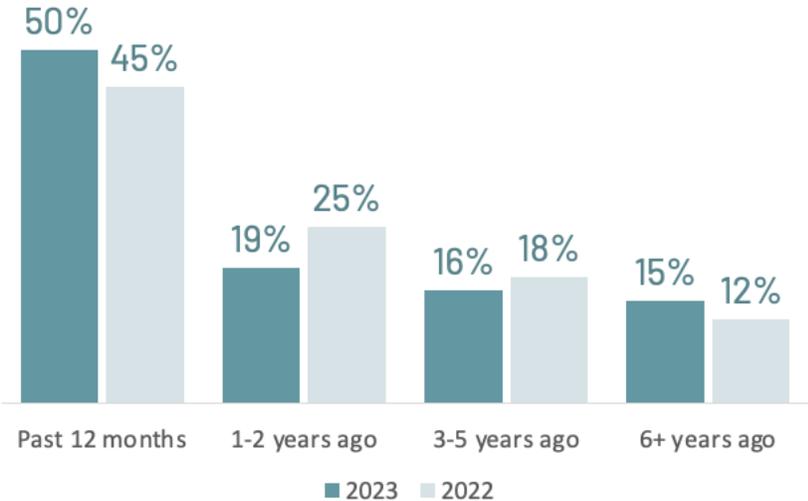


■ FIRST TIME ■ REPEAT

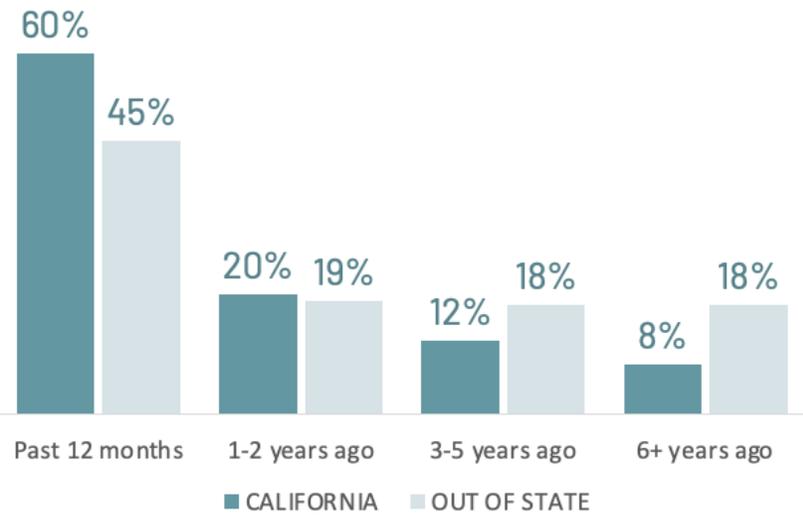
REPEAT VISITORS – PAST YEAR & CA VISITORS UP



PREVIOUS VISIT 2023 VS. 2022



PREVIOUS VISIT CALIFORNIA VS. OUT OF STATE 2023



TOP 15 ORIGIN STATES

California	21.96%
Colorado	12.95%
New York	6.36%
Massachusetts	5.23%
Texas	4.75%
TOP 5	51.25%

Illinois	4.18%
Washington	3.86%
New Jersey	3.62%
Ohio	2.82%
Florida	2.57%
Virginia	2.41%
Pennsylvania	1.85%
Minnesota	1.77%
Missouri	1.77%
Michigan	1.69%
TOP 15	77.80%

FIRST TIME VISITORS

California	11.68
Colorado	11.23
New York	8.04
Massachusetts	7.59
Illinois	5.77
TOP 5	44.31%

Texas	5.46
New Jersey	5.31
Washington	3.49
Ohio	3.34
Florida	2.88
Pennsylvania	2.88
Virginia	2.73
Minnesota	2.12
Missouri	2.12
Indiana	1.97
TOP 15	76.61

REPEAT VISITORS

California	33.56
Colorado	14.90
New York	4.45
Washington	4.28
Texas	3.94
TOP 5	61.13%

Massachusetts	2.57
Illinois	2.40
Florida	2.23
Ohio	2.23
Arizona	2.05
Virginia	2.05
Oregon	1.88
New Jersey	1.71
Maryland	1.54
Michigan	1.54
TOP 15	81.33

OUT-OF-STATE VISITORS

Colorado	16.91
New York	8.30
Massachusetts	6.83
Texas	6.20
Illinois	5.46
TOP 5	45.7%

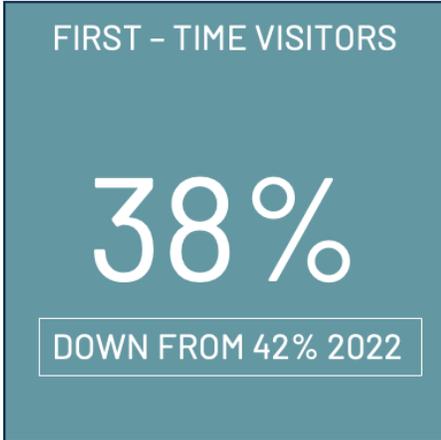
Washington	5.04
New Jersey	4.73
Ohio	3.68
Florida	3.36
Virginia	3.15
Pennsylvania	2.42
Minnesota	2.31
Missouri	2.31
Michigan	2.21
Maryland	2.00
TOP 15	74.91

VISITORS WITH IKON PASS

40% HAVE AN IKON PASS



NOTE: NO CHANGE FROM 2022



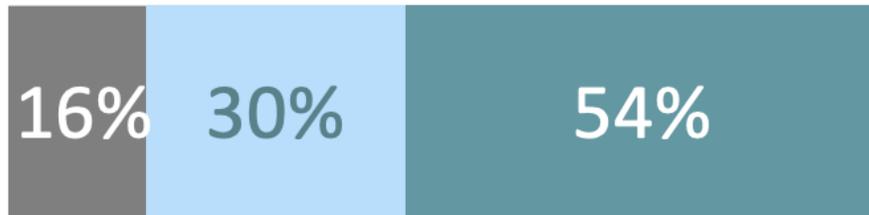
VISITOR EXPERIENCE



UNITED FLIGHT EXPERIENCE



RATING



■ 0-6 ■ 7-8 ■ 9-10

38.46

(POSITIVE - NEGATIVE)

DOWN FROM 53% 2022



FIRST - TIME VISITORS	33.39	REPEAT VISITORS	44.18
CALIFORNIA VISITORS	42.86	OUT-OF-STATE VISITORS	38.03

MAMMOTH LAKES EXPERIENCE



Mammoth Lakes™

RATING



73.58

(POSITIVE-NEGATIVE)

DOWN FROM 80% 2022

FIRST TIME VISITORS

68.01

REPEAT VISITORS

79.80

CALIFORNIA VISITORS

73.91

OUT-OF-STATE VISITORS

73.40

KEY TAKEAWAYS



Overall, comments were positive, but several negative experiences rose to the top...

- Airline/Airport delays; flights and late/lost baggage
- Limited flight options; wanted more direct flights, year-round flights and more flights overall
- Too much snow, the problems it caused and how it limited their experience
- Transportation to and from the airport and around town was limited, not reliable and they wanted more options
- The lack of things to do outside of winter sports; they wanted more restaurants, more nightlife activities and more information about them and options

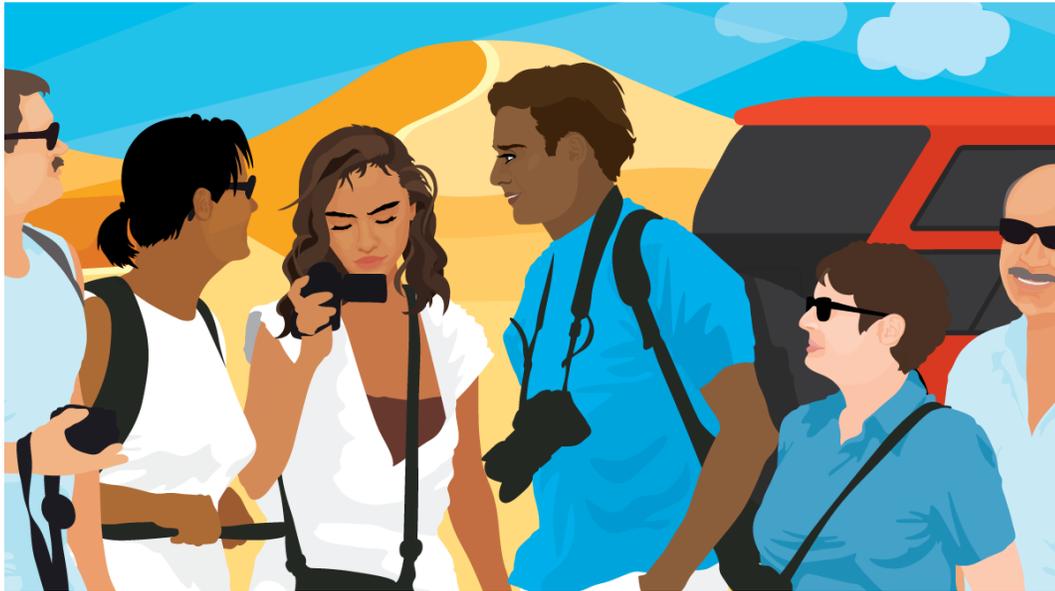
***Open-end comments are provided in a separate document.*

VISITOR TRIP PROFILE





PRIMARY TRIP DESTINATION



85%
MAMMOTH LAKES

9%
BISHOP



FIRST TIME VISITORS 90% MAMMOTH LAKES 5% BISHOP	REPEAT VISITORS 80% MAMMOTH LAKES 14% BISHOP
CALIFORNIA VISITORS 82% MAMMOTH LAKES 13% BISHOP	OUT-OF-STATE VISITORS 86% MAMMOTH LAKES 8% BISHOP

PRIMARY TRIP PURPOSE

	%
Downhill Skiing	52.7%
Snowboarding	19.5%
Visiting friends or family	14.2%
Work/Business	3.1%
Attending festivals and events	2.5%
Conference	1.5%
Other	1.4%
Enjoy nature	1.3%
Spend time in the mountains during the Holidays	1.0%
Rock Climbing	1.0%
Other winter activities	0.7%
Cross Country Skiing	0.5%
Fishing	0.2%
Wedding	0.2%

FIRST TIME VISITORS

	%
Downhill Skiing	58.9%
Visiting friends or family	19.1%
Conference	7.1%
Other	3.6%
Rock Climbing	3.2%
Other winter activities	1.8%
Enjoy nature	1.2%
Work/Business	1.1%
Spend time in the mountains during the Holidays	1.1%
Cross Country Skiing	1.1%
Snowboarding	0.8%
Attending festivals and events	0.8%
Wedding	0.3%

REPEAT VISITORS

	%
Downhill Skiing	45.7%
Visiting friends or family	22.1%
Snowboarding	19.9%
Work/Business	4.1%
Other	1.7%
Enjoy nature	1.5%
Attending festivals and events	1.2%
Spend time in the mountains during the Holidays	1.0%
Rock Climbing	1.0%
Other winter activities.	0.7%
Fishing	0.5%
Cross Country Skiing	0.2%
Wedding	0.2%
Conference	0.2%

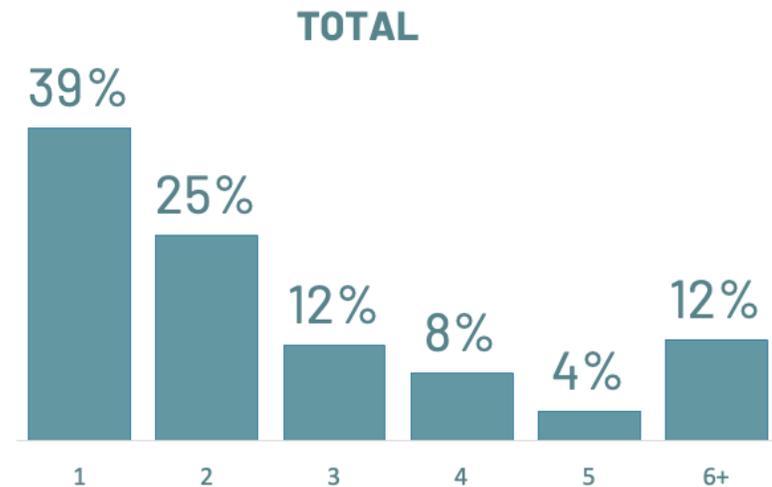
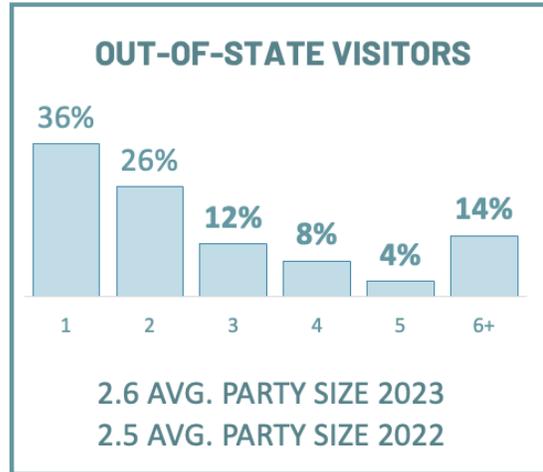
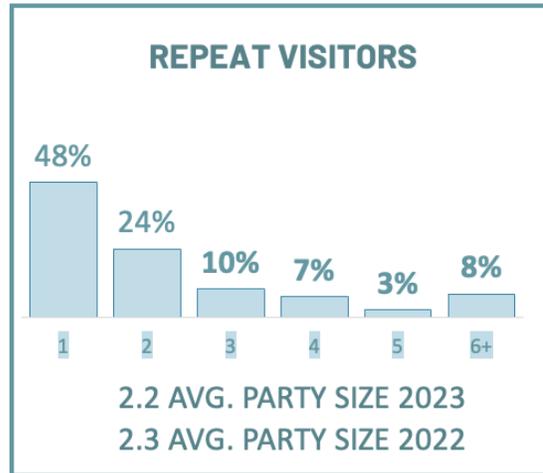
CALIFORNIA VISITORS

	%
Downhill Skiing	49.8%
Snowboarding	20.1%
Visiting friends or family	14.7%
Work/Business	4.0%
Other	2.6%
Enjoy nature	2.2%
Spend time in the mountains during the Holidays	1.8%
Rock Climbing	1.8%
Other winter activities	1.5%
Cross Country Skiing	0.4%
Attending festivals and events	0.4%
Wedding	0.4%
Fishing	0.4%

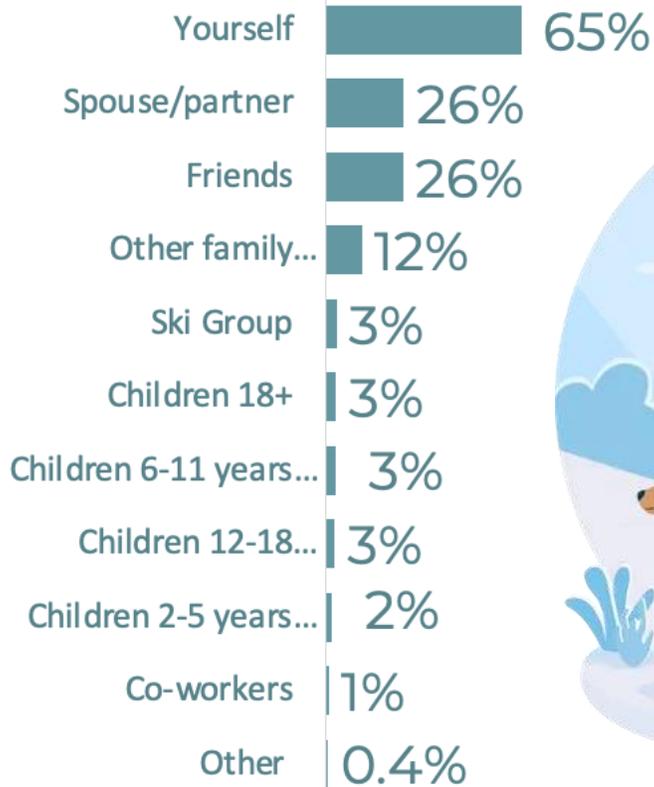
OUT OF STATE VISITORS

	%
Downhill Skiing	53.2%
Snowboarding	19.4%
Visiting friends or family	14.3%
Attending festivals and events	3.2%
Work/Business	2.9%
Conference	2.0%
Enjoy nature	1.1%
Other	0.9%
Spend time in the mountains during the Holidays	0.8%
Rock Climbing	0.8%
Other winter activities	0.5%
Cross Country Skiing	0.4%
Fishing	0.2%
Wedding	0.2%

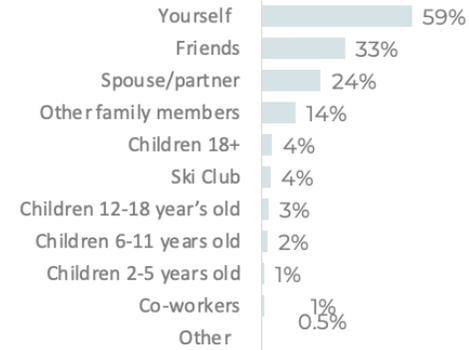
PARTY SIZE



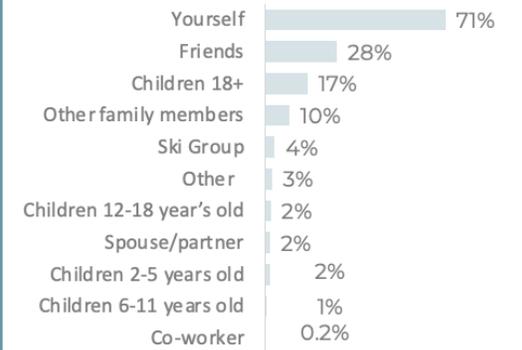
TRAVEL COMPANIONS



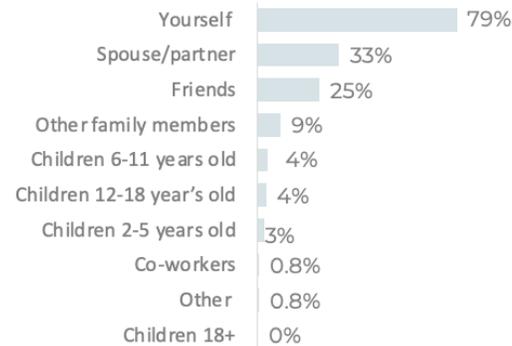
FIRST TIME VISITORS



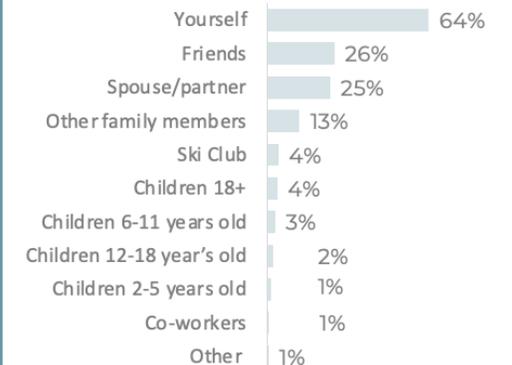
REPEAT VISITORS



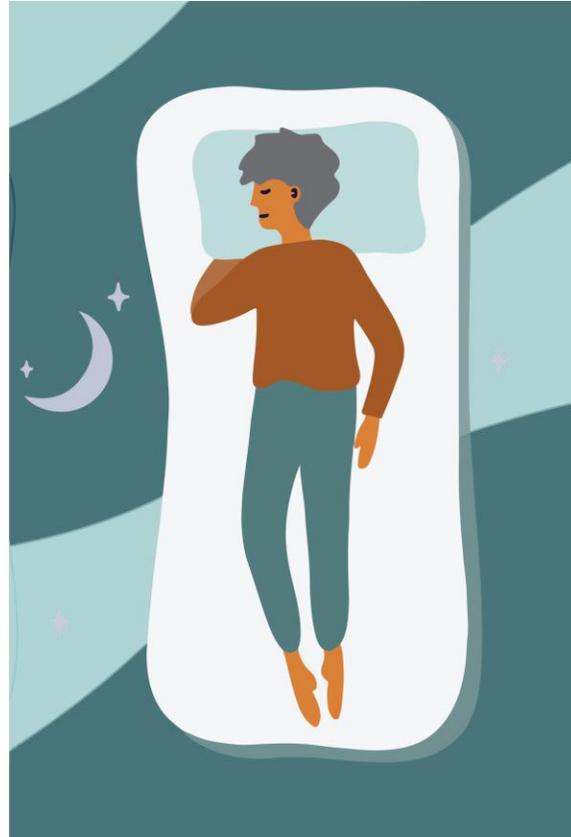
CALIFORNIA VISITORS



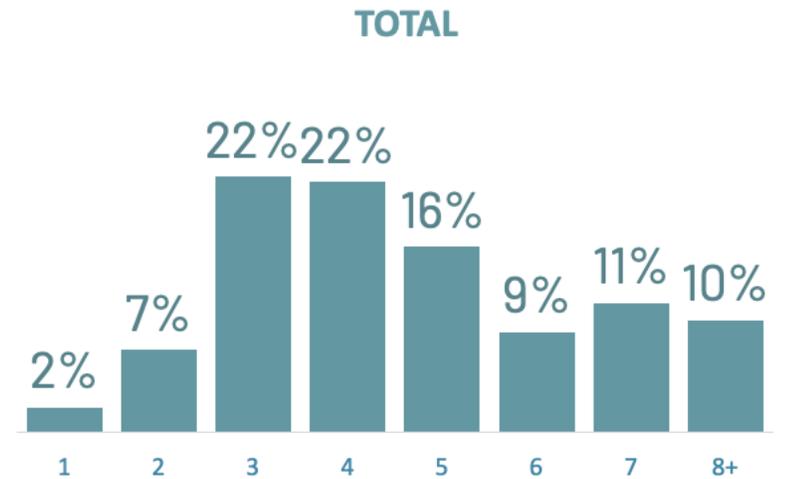
OUT-OF-STATE VISITORS



AVERAGE # OF NIGHTS

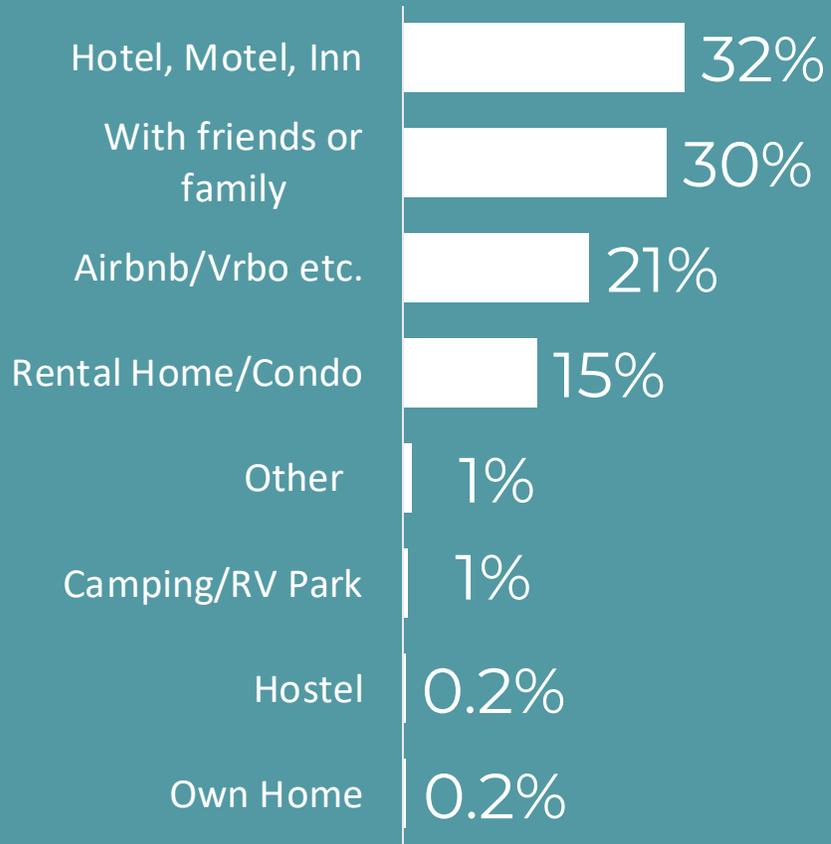


4.6 AVG. # NIGHTS 2023
4.2 AVG. # NIGHTS 2022

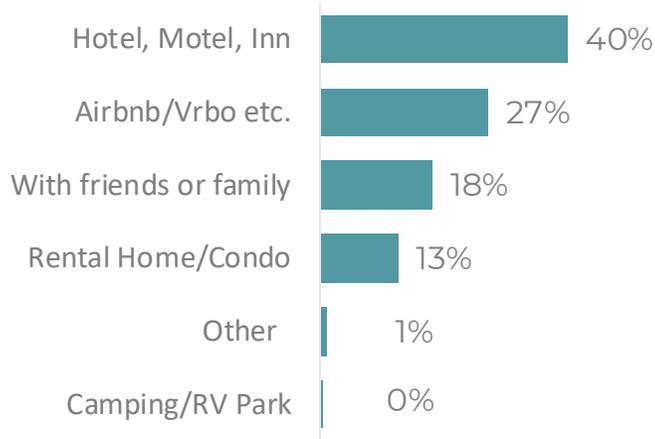


Average # of nights increased in 2023.

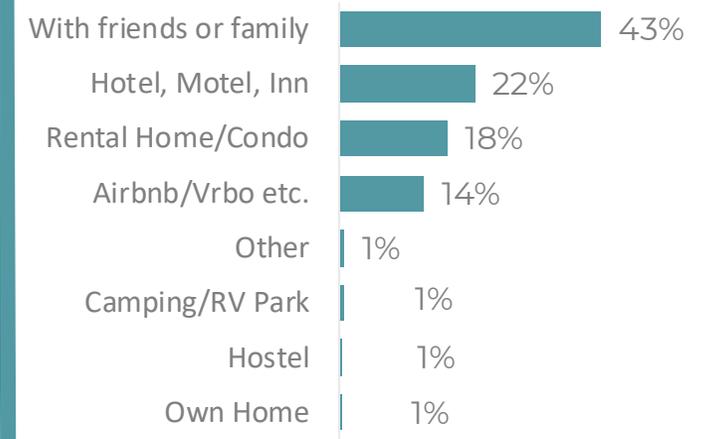
ACCOMMODATIONS



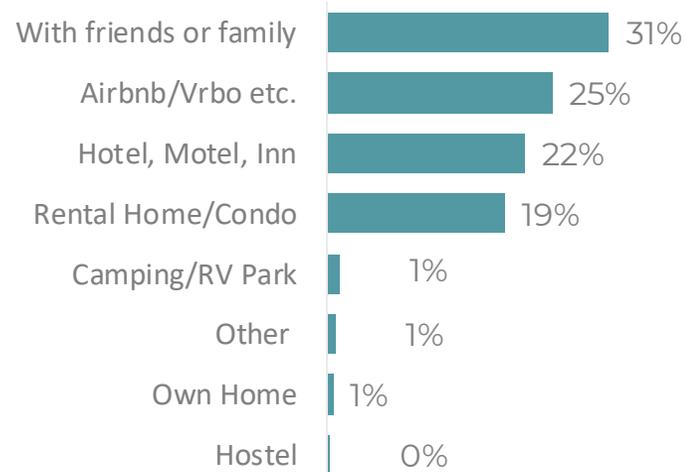
FIRST TIME VISITORS



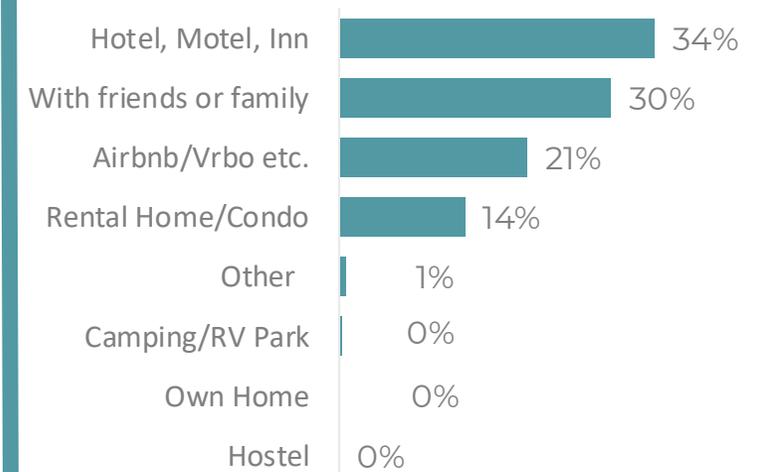
REPEAT VISITORS



CALIFORNIA VISITORS



OUT-OF-STATE VISITORS



LOCAL TRANSPORTATION



FROM AIRPORT

Friend's or Family's vehicle	36.7%
Shuttle Service	34.0%
Rental Car	14.5%
Taxi	8.3%
Other	4.3%
Ski Club	1.1%
Transit/Bus	0.6%
Uber/Lyft	0.4%

IN-TOWN

Friend's or Family's vehicle	41.6%
Free Town Shuttle (ML)	23.3%
Rental Car	14.5%
Shuttle Service	12.6%
Other	3.8%
Taxi	2.4%
Ski Club	0.9%
Walk	0.6%
Uber/Lyft	0.3%

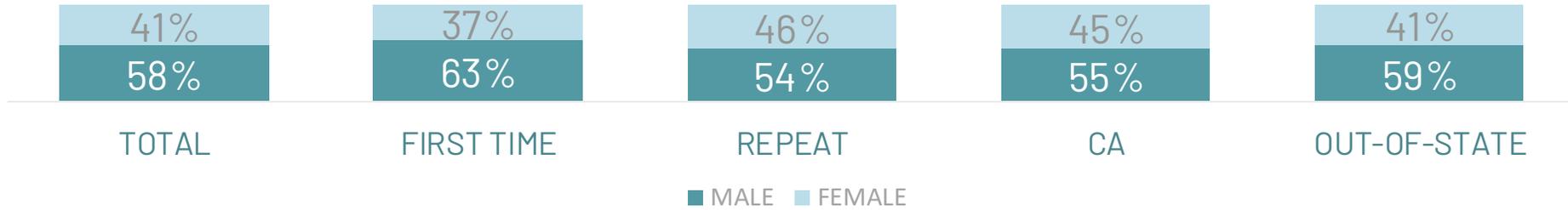
VISITOR DEMOGRAPHICS



DEMOGRAPHICS



GENDER



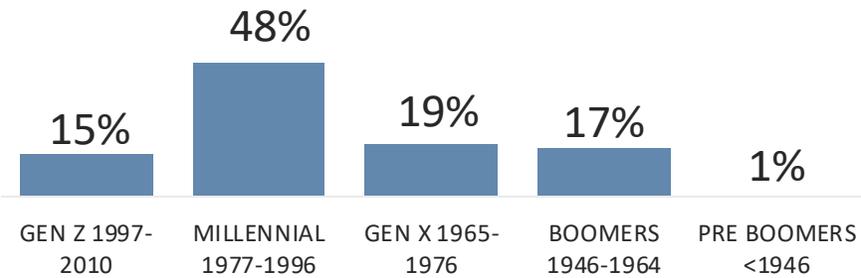
AVERAGE HOUSEHOLD INCOME



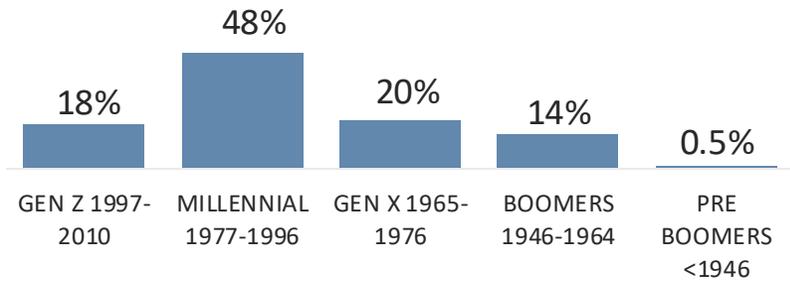
DEMOGRAPHICS



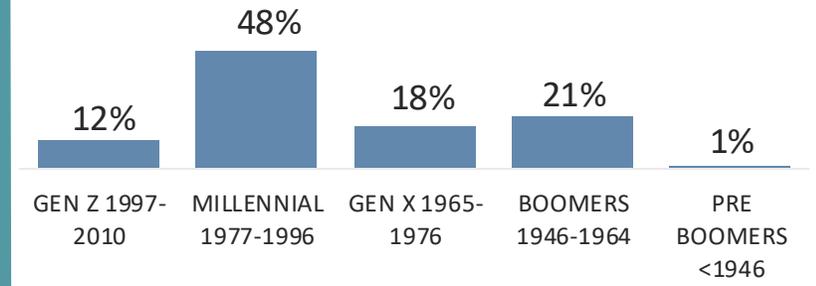
TOTAL GENERATION



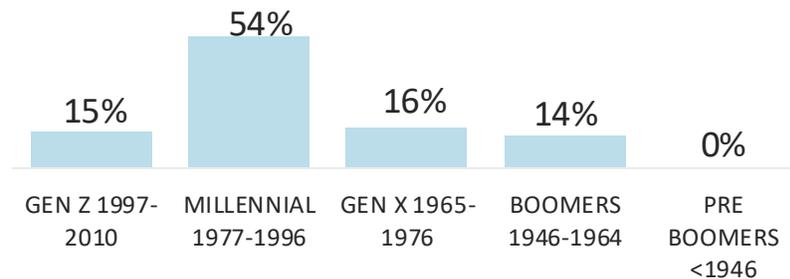
FIRST TIME



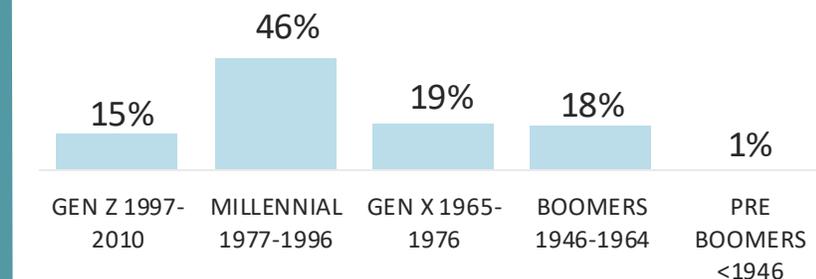
REPEAT



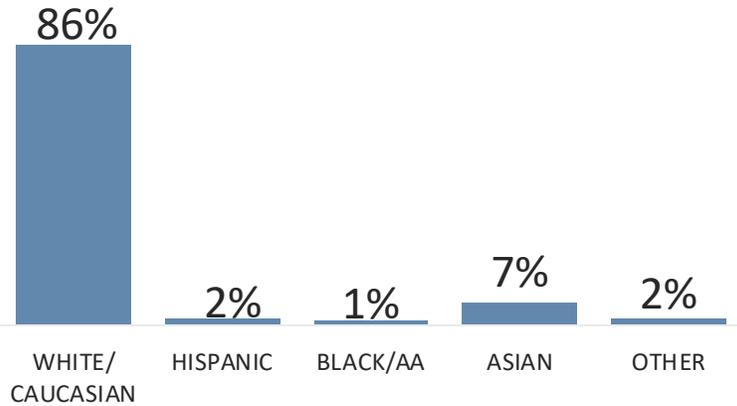
CALIFORNIA



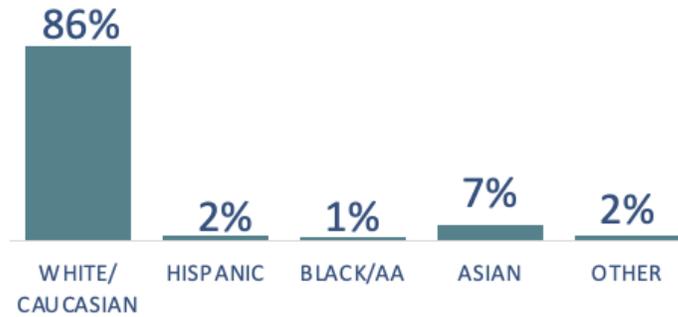
OUT OF STATE



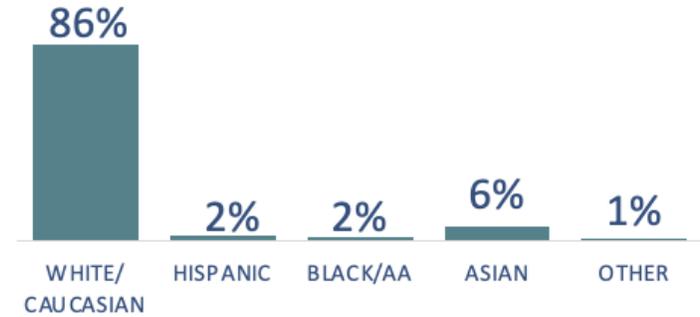
DEMOGRAPHICS



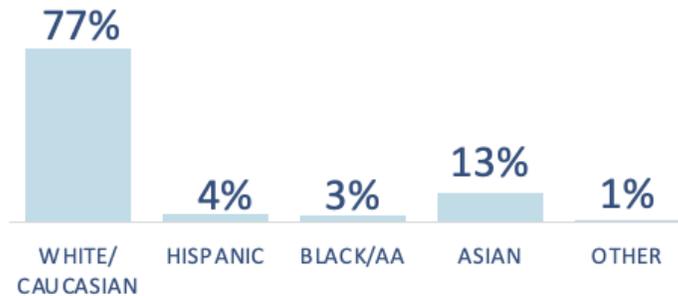
FIRST TIME VISITORS



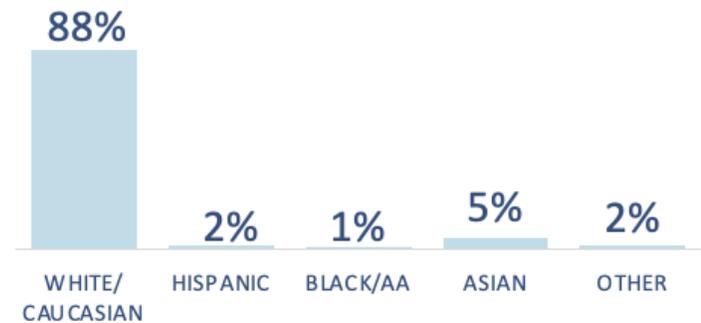
REPEAT VISITORS



CALIFORNIA VISITORS



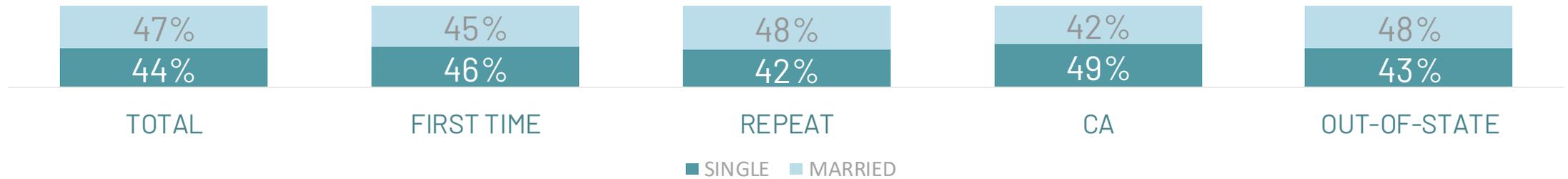
OUT-OF-STATE VISITORS



DEMOGRAPHICS



MARITAL STATUS



CHILDREN IN HOUSEHOLD



IKON PASS PROFILE

TRAVEL	TOTAL	IKON	INDEX
TRAVELER TYPE			
CALIFORNIA	22%	22%	100
OUT OF STATE	78%	78%	100
FIRST TIME	53%	50%	94
REPEAT	47%	50%	106
EXPERIENCE POSITIVE RATING			
UNITED	38.46	32.34	84
MAMMOTH LAKES	73.58	71.81	98
PRIMARY TRIP PURPOSE			
DOWNHILL	53%	67%	126
SNOWBOARDING	20%	24%	120
TRAVEL PARTY /NIGHTS			
AVG # TRAVEL PARTY	2.50	2.90	116
AVG # NIGHTS	4.60	4.90	107
ACCOMODATIONS			
HOTEL, MOTEL, INN	32%	27%	85
RENTAL HOME/CONDO	15%	16%	110
ARBND/VRBO	21%	29%	137
WITH FRIENDS/FAMILY	30%	26%	87

ABOVE AVERAGE



IKON PASS HOLDER

DEMOGRAPHICS	TOTAL	IKON	INDEX
GENDER			
MALE	58%	62%	107
FEMALE	41%	38%	93
GENERATION			
GEN Z	15%	18%	120
MILLENNIAL	48%	48%	100
GEN X	19%	19%	100
BOOMER	17%	14%	82
INCOME			
AVG. HH INCOME	\$165,363	\$169,815	103
MARITAL STATUS			
SINGLE	44%	51%	116
MARRIED	47%	41%	87
CHILDREN IN HH			
	19%	17%	91
ETHNICITY			
CAUCASIAN	86%	86%	100
HISPANIC	2%	2%	100
BLACK/AA	1%	1%	100
ASIAN	7%	7%	100
OTHER	2%	2%	100

EASTERN SIERRA REGIONAL AIRPORT & BISHOP

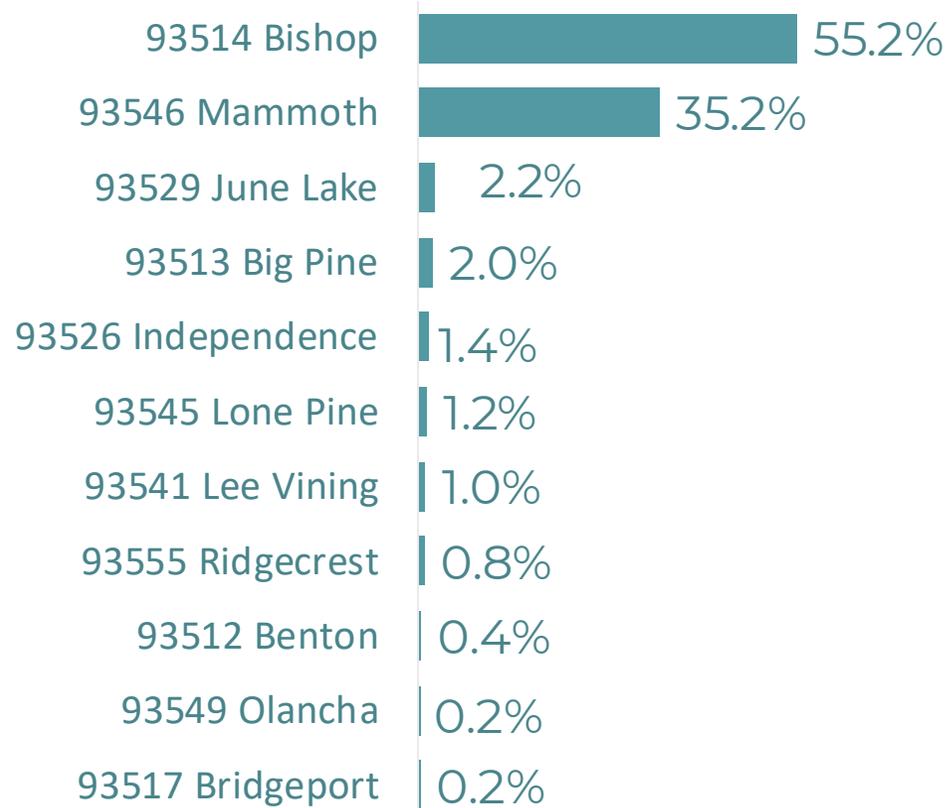
LOCALS & VISITORS



LOCALS



LOCAL ZIP CODES



46%

FIRST TIME USING BIH

54%

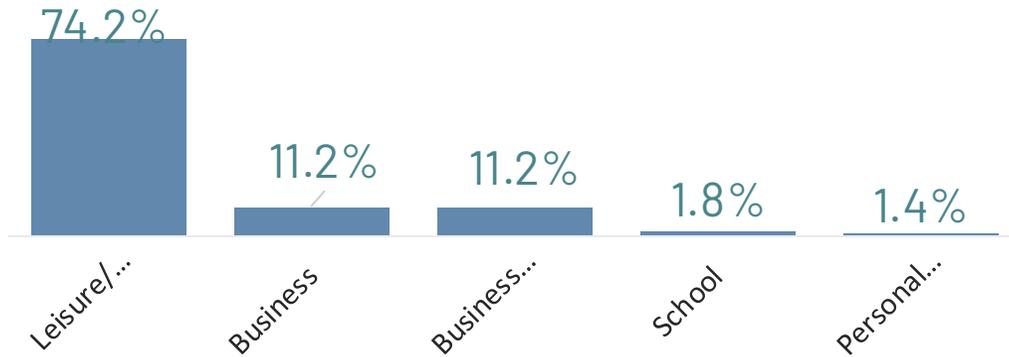
TRIPS PAST YR

16% 1X/YR
48% 2-3X/YR
22% 3-5X/YR
14% 6+X/YR

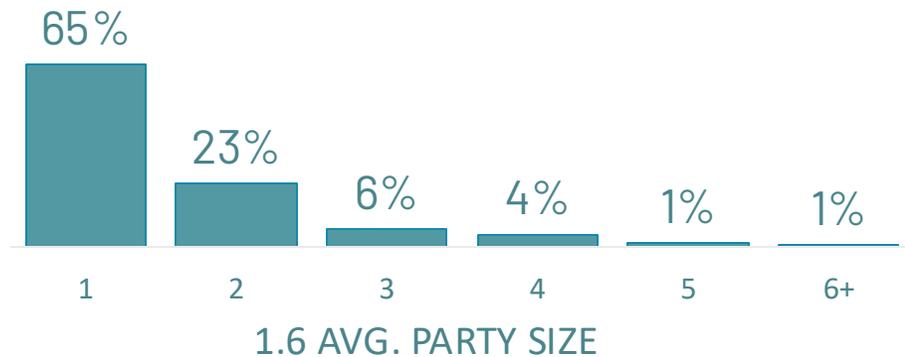
LOCALS



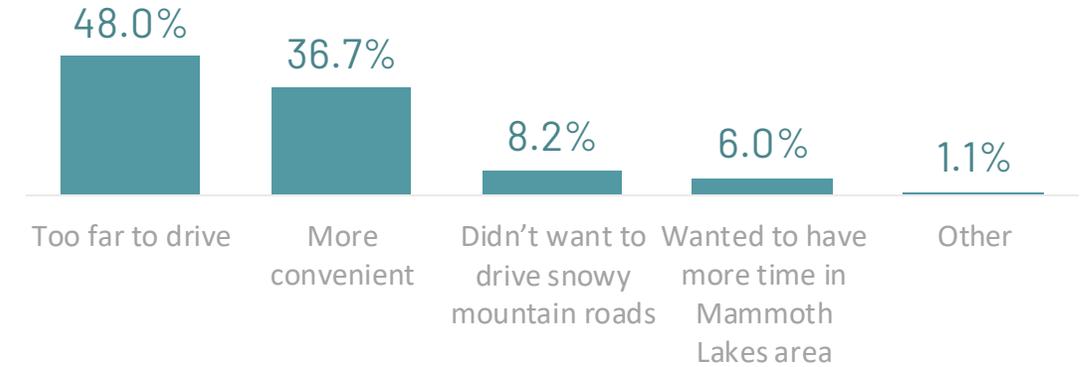
TRIP PURPOSE



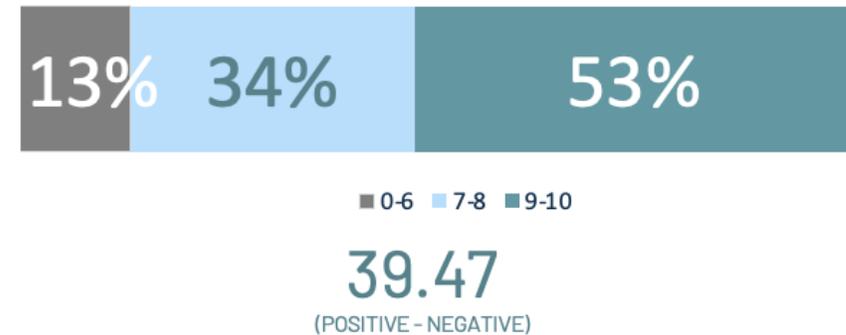
PARTY SIZE



REASON FOR FLYING INSTEAD OF DRIVING



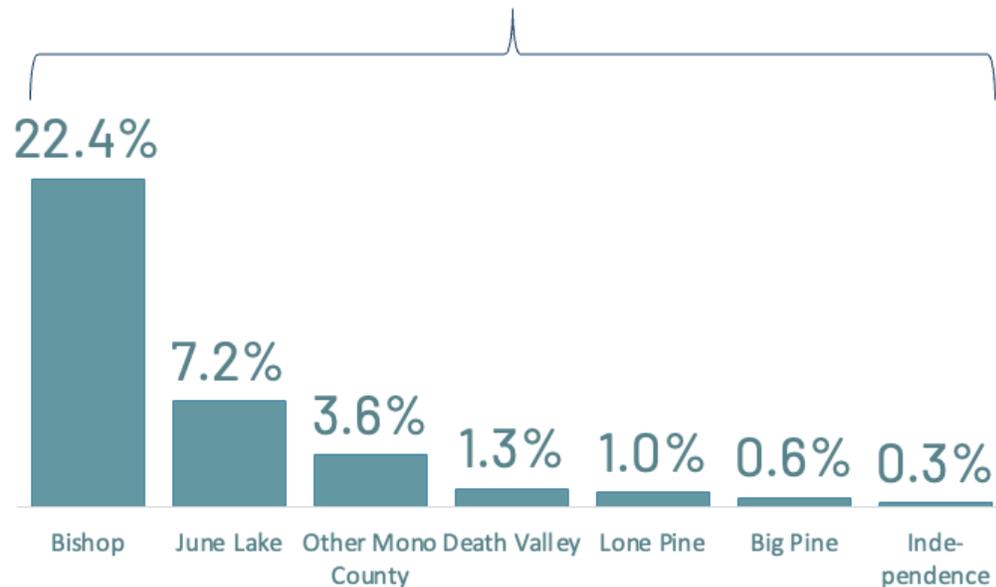
UNITED POSITIVE RATING



PRIMARY MAMMOTH LAKES VISITORS WILL / DID VISIT OTHER AREA DESTINATIONS



36%



BISHOP ACTIVITIES –WILL/DID VISIT

Visit local restaurants	38%
Visit local shops	21%
Stay overnight in a hotel, motel or inn	14%
Stay overnight in a rental Home/Condo, Airbnb/Vrbo etc.	5%
Rock climbing or Bouldering	2%
Visit a museum	2%

PRIMARY BISHOP VISITORS



BISHOP ACTIVITIES –WILL/DID VISIT



Visit Friends/Family	23.3%
Rock climbing or Bouldering	19.4%
Visit local restaurants	13.3%
Other-Please specify	11.7%
Stay overnight in a hotel, motel or inn	8.9%
Visit local shops	7.8%
Work	7.8%
Stay overnight in a rental Home/Condo, Airbnb/Vrbo etc.	3.9%
Visit a museum	3.3%



FUTURE AIR SURVEYS



Q'S FOR FUTURE AIR SURVEYS

- Add questions to provide value to air travelers
- Ask repeat visitors...
 - How often do they plan on visiting?
 - Winter and other seasons?
- Ask first time visitors...
 - Do they plan to return?
 - If so, when?
 - Would they consider other seasons?
- Add a spending per day/per person question
- Should groups (conferences, ski clubs) be separated from overall visitors and apply different values to them?
- Ask why they gave United Airlines and Mammoth Lakes a negative rating





THANK YOU

