

MAMMOTH LAKES TOURISM

2024 SUMMER AIR SURVEY

BISHOP AIRPORT



Mammoth Lakes[™]
CALIFORNIA

NOV 2024

2024 SUMMER AIR VISITOR PROFILE BISHOP AIRPORT (BIH)



OBJECTIVE: PROVIDE A CURRENT PROFILE OF THE SUMMER AIR VISITOR

Intercepts were conducted at the Eastern Sierra Regional Airport/Bishop 7/01/2024 – 10/6/2024

SAMPLE SIZE

965 TOTAL

497 LOCALS
468 VISITORS

174 FIRST TIME
294 REPEAT

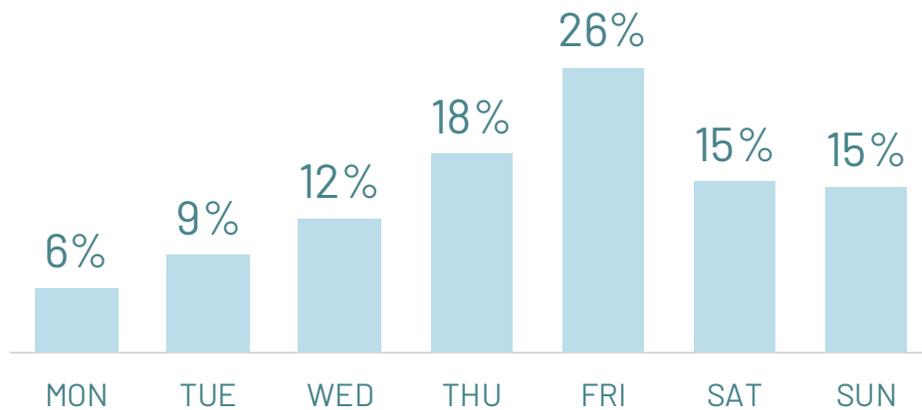
158 CALIFORNIA
310 OUT OF STATE
(19 OUT OF US)

242 ARRIVALS
226 DEPARTURES

VISITOR ARRIVAL & DEPARTURE DAYS

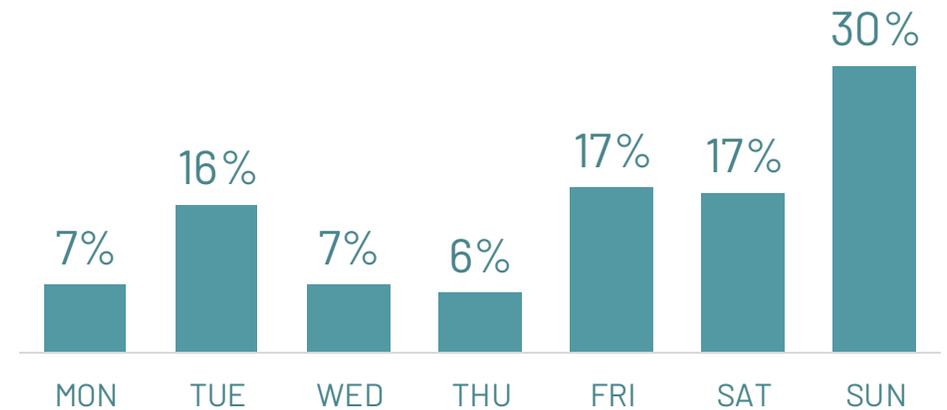


52% ARRIVALS



N=242

48% DEPARTURES



N=226

KEY CHANGES 2024 VS. 2023



- **SAMPLE SIZE:** 2024 Visitor Sample size (468) increased significantly from 2023 (166)
- **OUT OF STATE VISITORS:** Decreased in 2024 (66%) from 2023 (71%)
- **FIRST TIME VISITORS:** Decreased in 2024 (37%) from 2023 (42%)
- **MAMMOTH LAKES EXPERIENCE RATINGS:** Increased in 2024 (87.26) from 2023 (74.47)
- **TRIP CHARACTERISTICS:** Primary destination was up (46% - 2024 vs. 42% - 2023). Hotel/Motel was up (38% - 2024 vs. 30% - 2023). Party size and visiting friends & family were flat
- **AVERAGE DAILY SPENDING:** Decreased in 2024 (\$432.22) from 2023 (\$467.95). Significant decrease in spending by Non-Lodging visitors. Could be a result of the low sample in 2023
- **DEMOGRAPHICS:** Slightly lower incomes (\$163.5k - 2024 vs. \$169.1K - 2023) More singles (47% - 2024 vs. 39% - 2023). Higher Gen Z (14% - 2024 vs. 8% - 2023) and higher Gen X (23% - 2024 vs. 14% - 2023) and lower Millennials (44% - 2024 vs. 55% - 2023). These changes may also be a result of the low sample in 2023.

VISITOR TYPES, ORIGIN & SEASONS VISITED

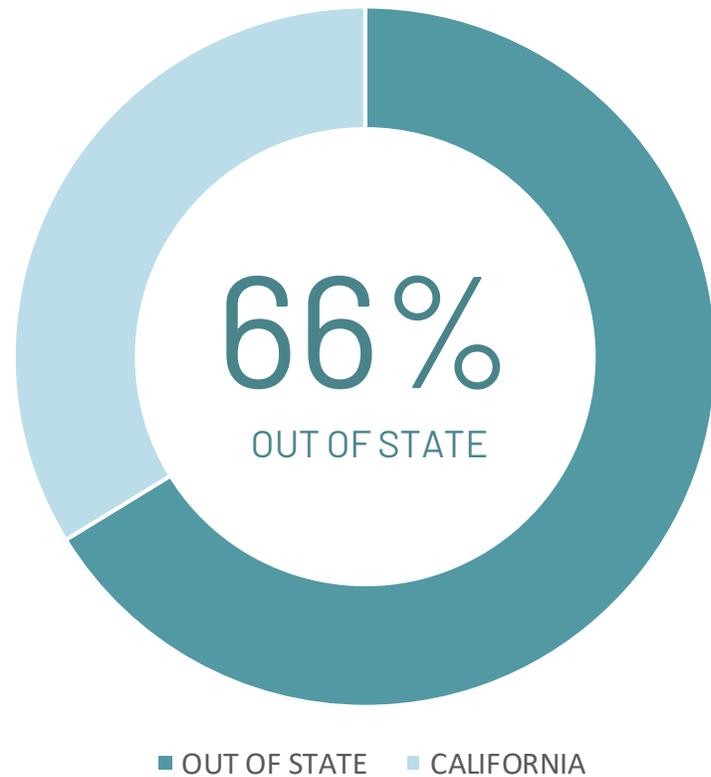


Mammoth Lakes[™]
CALIFORNIA

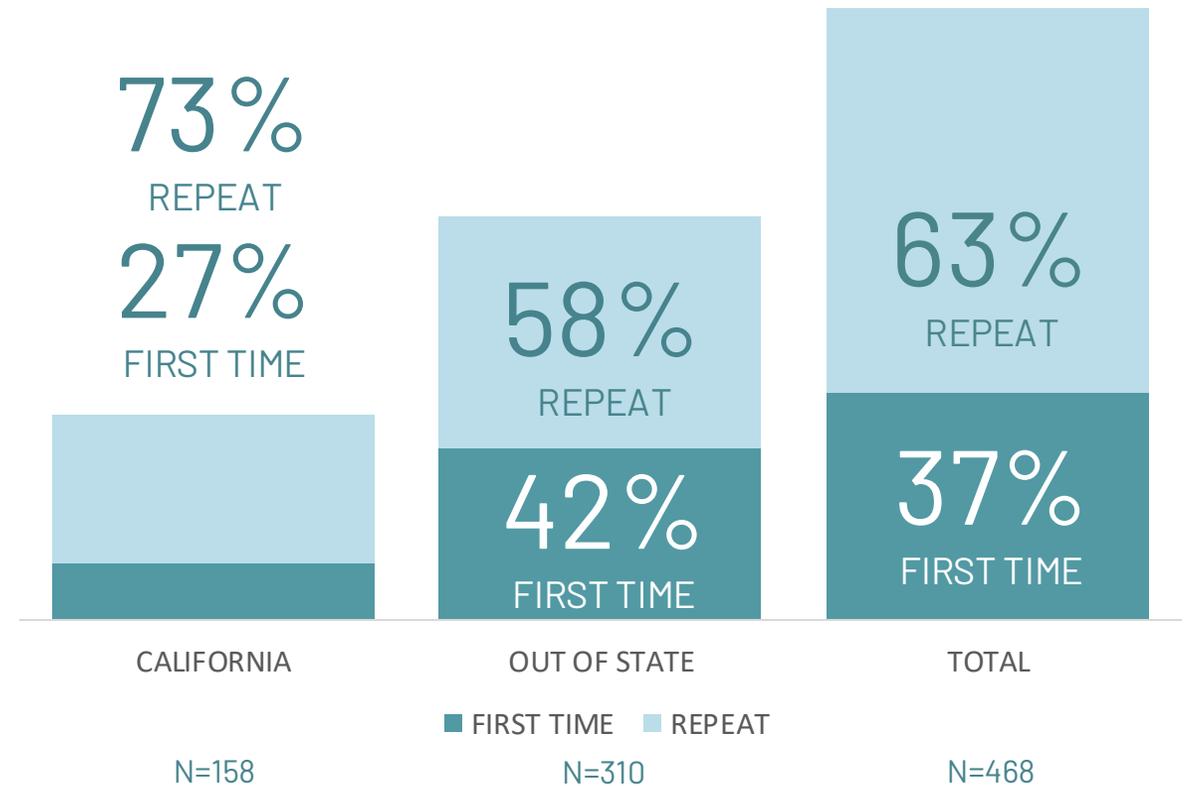
OUT OF STATE VS. CALIFORNIA VISITORS



OUT OF STATE VS. CALIFORNIA



REPEAT VS. FIRST TIME - OUT OF STATE & CALIFORNIA



TOTAL TRAVELER TYPE TREND



2024



2023



2022



2024



2023



2022

CALIFORNIA

33% 29% 32% | 25% 22% 36%

OUT OF STATE

66% 71% 68% | 75% 78% 64%

FIRST TIME

37% 42% 33% | 42% 53% 51%

REPEAT

63% 58% 67% | 58% 47% 49%

TOP ORIGIN STATES

| | |
|------------|--------|
| California | 33.76% |
| Colorado | 8.97% |
| Washington | 7.26% |
| Texas | 5.34% |
| Oregon | 4.49% |
| TOP 5 | 59.83% |

| | |
|----------|--------|
| New York | 4.06% |
| Illinois | 3.63% |
| Arizona | 2.78% |
| Ohio | 2.14% |
| Virginia | 2.14% |
| TOP 6-10 | 14.74% |

TOP 10 74.57%

4% International visitors

N=349

FIRST TIME VISITORS

| | |
|------------|--------|
| California | 24.71% |
| Colorado | 9.77% |
| Washington | 9.20% |
| Texas | 7.47% |
| Illinois | 6.32% |
| TOP 5 | 57.47% |

| | |
|----------|--------|
| Ohio | 4.60% |
| New York | 4.02% |
| Arizona | 2.30% |
| Georgia | 1.72% |
| Kentucky | 1.72% |
| TOP 6-10 | 14.37% |

TOP 10 71.84%

N=125

REPEAT VISITORS

| | |
|------------|--------|
| California | 39.12% |
| Colorado | 8.50% |
| Oregon | 6.46% |
| Washington | 6.12% |
| New York | 4.08% |
| TOP 5 | 64.29% |

| | |
|----------|--------|
| Texas | 4.08% |
| Arizona | 3.06% |
| Virginia | 3.06% |
| Idaho | 2.04% |
| Illinois | 2.04% |
| TOP 6-10 | 14.29% |

TOP 10 78.57%

N=231

OUT-OF-STATE VISITORS

| | |
|------------|--------|
| Colorado | 13.55% |
| Washington | 10.97% |
| Texas | 8.06% |
| Oregon | 6.77% |
| New York | 6.13% |
| TOP 5 | 45.48% |

| | |
|----------|--------|
| Illinois | 5.48% |
| Arizona | 4.19% |
| Ohio | 3.23% |
| Virginia | 3.23% |
| Idaho | 2.58% |
| TOP 6-10 | 18.71% |

TOP 10 64.19%

N=199

TOP SUMMER VISITOR ORIGIN STATES – TREND



2024

| | |
|------------|--------|
| California | 33.76% |
| Colorado | 8.97% |
| Washington | 7.26% |
| Texas | 5.34% |
| Oregon | 4.49% |
| TOP 5 | 59.83% |



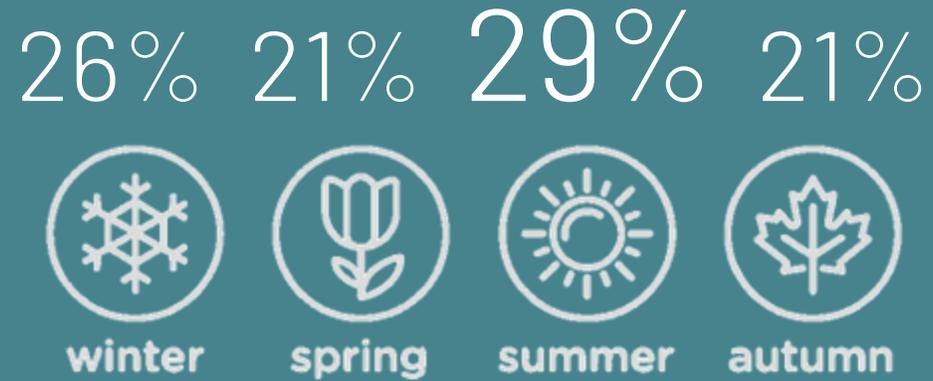
2023

| | |
|---------------|--------|
| 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% |

SUMMER REPEAT VISITORS - PAST SEASONS VISITED



TOTAL REPEAT VISITORS

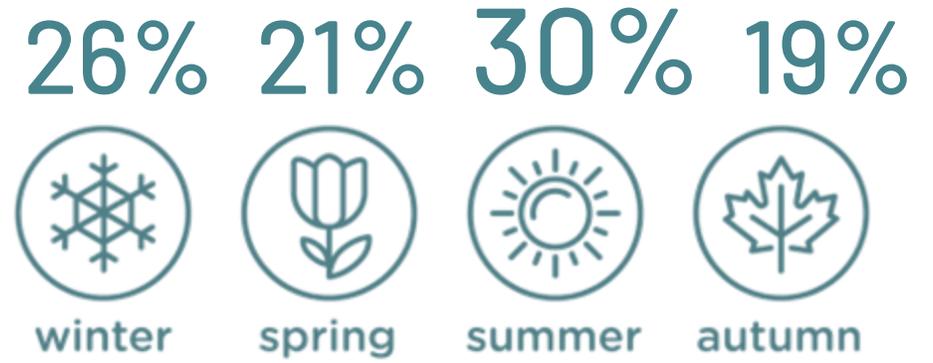


N=294

VISITED LAST TIME

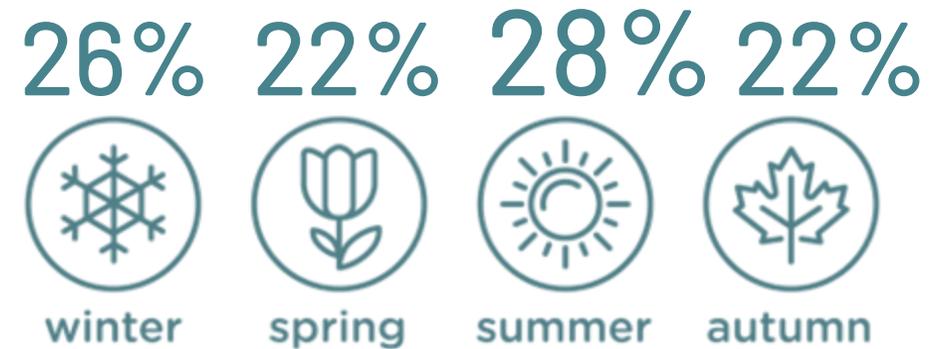
| | |
|----------------|-------|
| Past 12 months | 56.8% |
| 1-2 years ago | 18.7% |
| 3-5 years ago | 11.2% |
| 6+ years ago | 13.3% |

CALIFORNIA REPEAT VISITORS



N=215

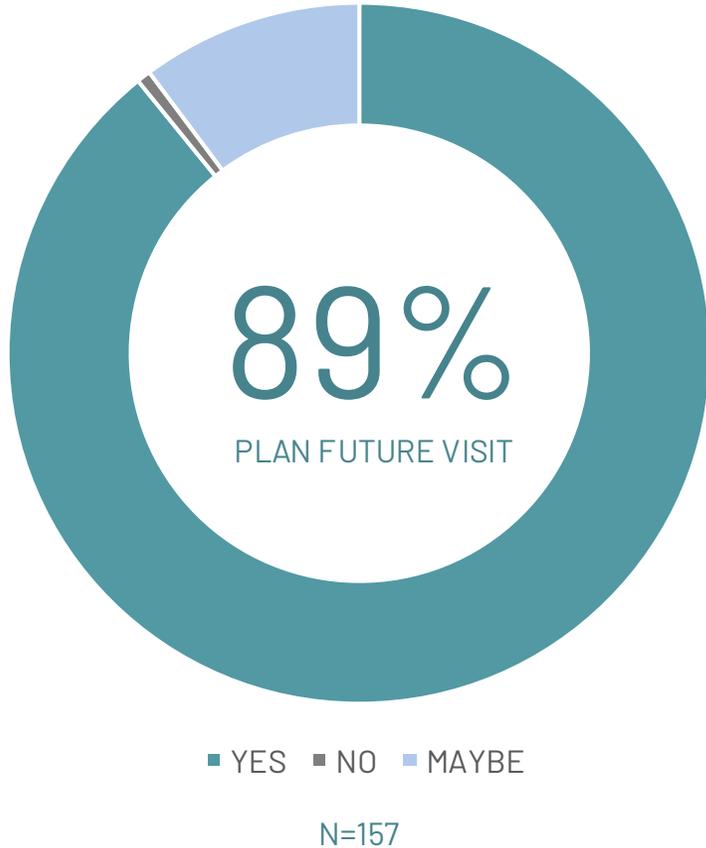
OUT-OF-STATE REPEAT VISITORS



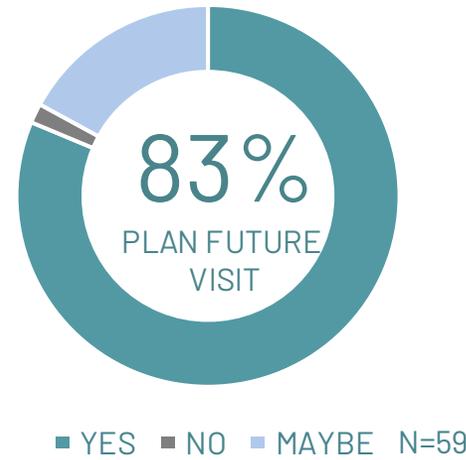
N=463

PLANNED FUTURE VISITS – Remains Very High

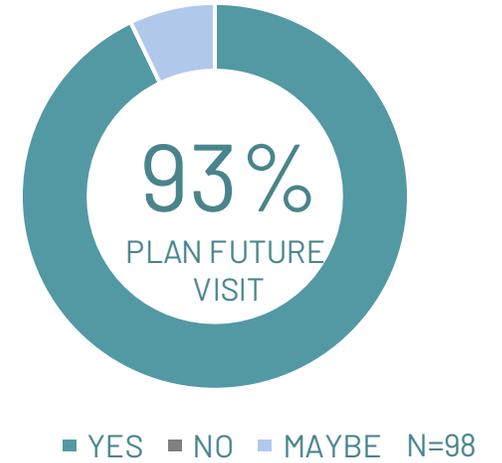
Repeat & California Visitors continue to have the highest intention to visit again



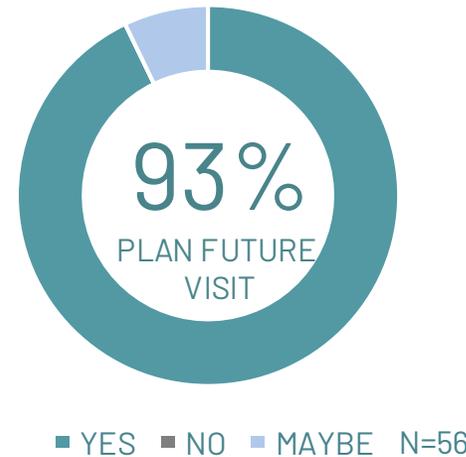
FIRST TIME VISITORS



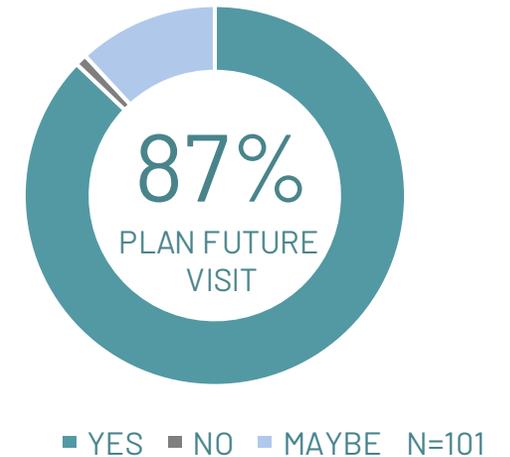
REPEAT VISITORS



CALIFORNIA VISITORS



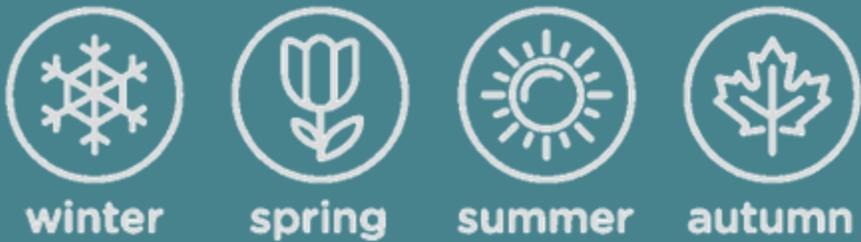
OUT-OF-STATE VISITORS



FUTURE SEASON VISITS (OF THOSE CONSIDERING FUTURE VISITS)



25% 20% 30% 25%



N=151

FIRST TIME VISITORS

25% 20% 31% 24%



N=59

REPEAT VISITORS

25% 20% 30% 25%



N=98

CALIFORNIA VISITORS

25% 20% 29% 25%



N=56

OUT-OF-STATE VISITORS

25% 20% 31% 24%



N=101

VISITOR EXPERIENCE

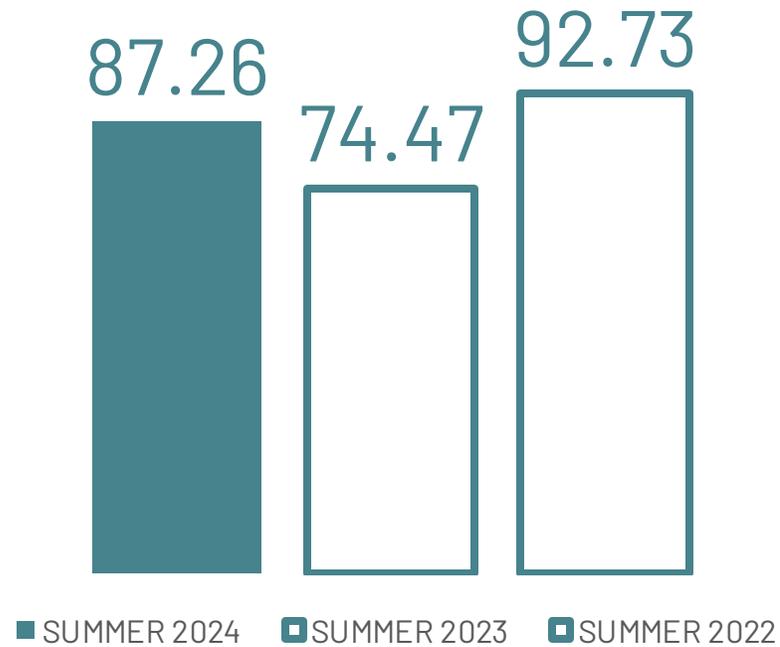


Mammoth Lakes[™]
CALIFORNIA

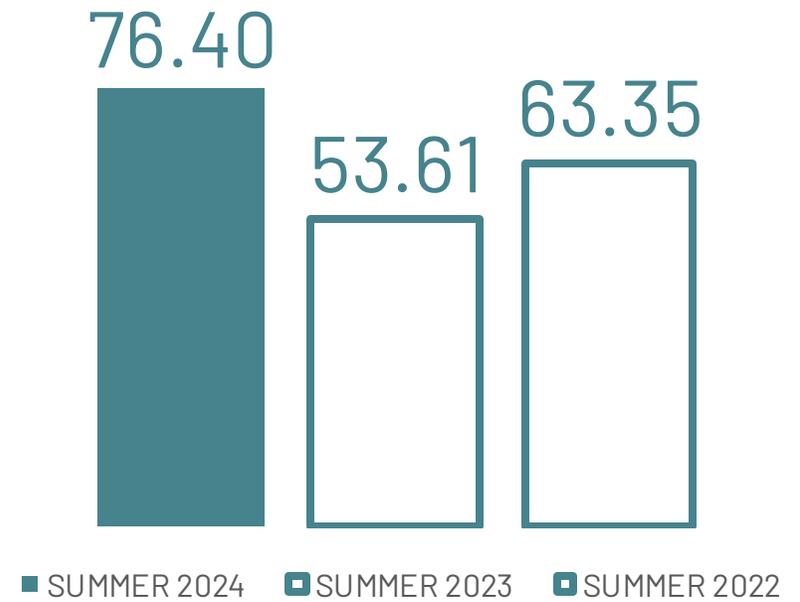
SUMMER NET PROMOTER SCORE



MAMMOTH LAKES



UNITED AIRLINES



UNITED FLIGHT NET PROMOTER SCORE



3%

■ 0-6 ■ 7-8 ■ 9-10

76.40

(POSITIVE - NEGATIVE)

N=304

FIRST - TIME VISITORS

77.01

N=174

REPEAT VISITORS

76.19

N=294

CALIFORNIA VISITORS

75.32

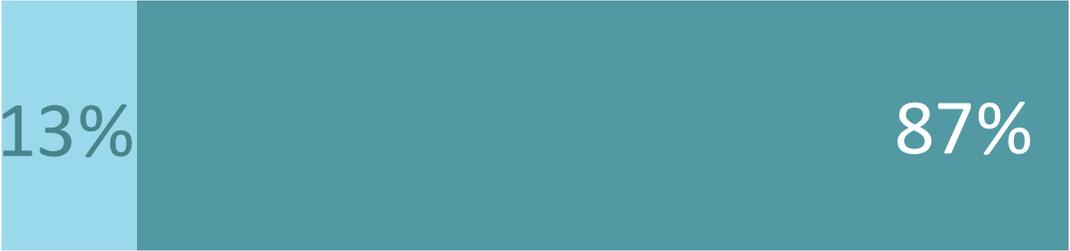
N=158

OUT-OF-STATE VISITORS

77.10

N=291

MAMMOTH LAKES NET PROMOTER SCORE



0%

0-6

7-8

9-10

87.26

(POSITIVE-NEGATIVE)

N=157

There were no negative ratings for any of the visitor segments

FIRST TIME VISITORS

83.05

N=59

REPEAT VISITORS

89.80

N=98

CALIFORNIA VISITORS

87.50

N=56

OUT-OF-STATE VISITORS

87.13

N=101

MAMMOTH/UNITED COMMENTS



POSITIVE - MAMMOTH

- Best town in the world!
- It was amazing! So pretty and great service!
- Flying into Bishop is excellent
- Fantastic place for a family vacation. So much to see and do. I loved it !
- The shuttle buses are helpful. Mammoth staff were very friendly and helpful.
- Incredible experience, such friendly locals!
- The most beautiful place in California, the airport makes it accessible for all, please keep it!

NEGATIVE - MAMMOTH

- Loved it. Please offer more flights and/or all year round.
- Food could be better in Mammoth Lakes!
- Awesome town to visit! The pedestrian infrastructure seems like it was an afterthought for the amount of people in the town but I loved my experience then
- Love Mammoth and all the options! Just wish there were more affordable accommodations
- Everything was great! It would be nice if the buses (ESTA and YARTs) ran more frequently.
- Everything was great. More transportation between Bishop and Mammoth would be nice. Mammoth taxi isn't the greatest. MAWS is better.

NEGATIVE - AIR SERVICE

- Flight was delayed by 5.5 hours and updates were inconsistent and inaccurate throughout.
- Heat delay
- My flight was delayed, and then I missed the connection. Since there's only one flight a day, my trip was cut by 60%
- The time of the flight and the lack of connections
- Canceled flights
- No communication about turbulence
- I think it's terrible to charge for a carry-on bag

VISITOR TRIP PROFILE



Mammoth Lakes[™]
CALIFORNIA

TRIP PROFILE TREND



| |  2024 |  2023 |  2022 |  2024 |  2023 |  2022 |
|-----------------------------|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| MAMMOTH PRIMARY DESTINATION | 46% | 42% | 51% | 82% | 85% | 79% |
| PARTY SIZE | 2.1 | 2.1 | 2.7 | 1.9 | 2.5 | 2.5 |
| AVG. # NIGHTS | 4.5 | 4.8 | 4.8 | 4.7 | 4.6 | 4.2 |
| HOTEL, MOTEL, INN | 38% | 30% | 27% | 24% | 32% | 30% |
| FRIENDS/FAMILY | 30% | 29% | 40% | 30% | 30% | 28% |

PRIMARY TRIP PURPOSE

| | |
|------------------------------|-------|
| Outdoor adventure activities | 37.8% |
| Visiting friends or family | 25.4% |
| Other outdoor activities | 9.4% |
| Enjoy nature | 8.8% |
| Attending a wedding | 5.3% |
| Attending festivals/events | 3.6% |
| Work/Business | 3.4% |
| Other | 2.4% |
| Water activities | 1.9% |
| Fishing | 1.5% |
| Sporting Event | 0.4% |

N=468

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 | 48.9% |
| Visiting friends or family | 11.5% |
| Other outdoor activities | 10.9% |
| Enjoy nature | 9.2% |
| Attending a wedding | 7.5% |
| Other | 4.6% |
| Attending festivals and events | 2.9% |
| Work/Business | 2.3% |
| Sporting Event | 1.7% |
| Water activities | 0.6% |
| Fishing | 0.0% |

N=174

REPEAT VISITORS

| | |
|--------------------------------|-------|
| Visiting friends or family | 33.0% |
| Outdoor adventure activities | 31.3% |
| Other outdoor activities | 8.5% |
| Enjoy nature | 8.5% |
| Work/ Business | 4.8% |
| Attending a wedding | 4.1% |
| Other | 4.1% |
| Attending festivals and events | 3.7% |
| Water activities | 2.7% |
| Fishing | 2.4% |
| Sporting Event | 0.0% |

N=294

CALIFORNIA VISITORS

| | |
|--------------------------------|-------|
| Outdoor adventure activities | 31.0% |
| Visiting friends or family | 17.1% |
| Enjoy nature | 13.9% |
| Other outdoor activities | 10.1% |
| Attending a wedding | 8.9% |
| Attending festivals and events | 6.3% |
| Work/Business | 5.1% |
| Water activities | 3.2% |
| Other | 2.5% |
| Fishing | 1.9% |
| Sporting Event | 0.0% |

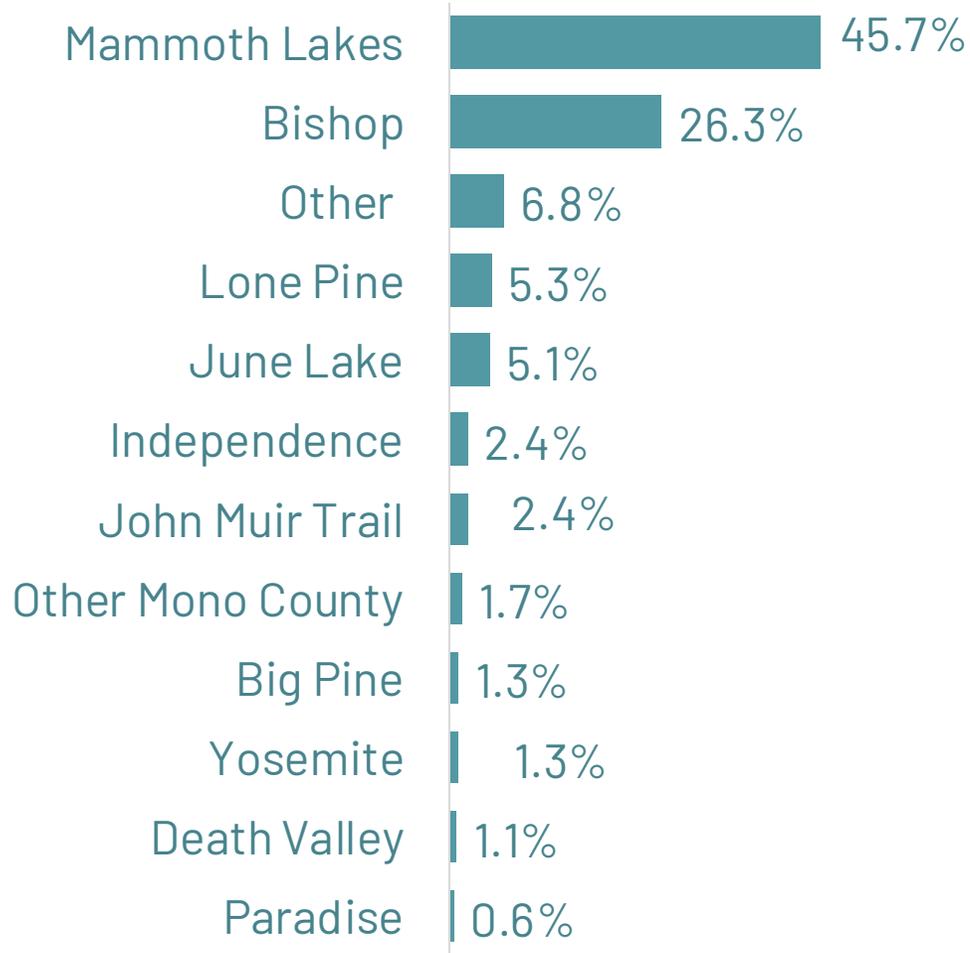
N=158

OUT OF STATE VISITORS

| | |
|--------------------------------|-------|
| Outdoor adventure activities | 41.3% |
| Visiting friends or family | 29.0% |
| Other outdoor activities | 9.0% |
| Enjoy nature | 6.1% |
| Attending a wedding | 3.5% |
| Work/Business | 3.2% |
| Other | 2.3% |
| Attending festivals and events | 1.9% |
| Water activities | 1.3% |
| Fishing | 1.3% |
| Sporting Event | 1.0% |

N=310

PRIMARY DESTINATION



N=468

FIRST TIME VISITORS

44%

MAMMOTH LAKES

22%

BISHOP

N=174

REPEAT VISITORS

47%

MAMMOTH LAKES

29%

BISHOP

N=294

CALIFORNIA VISITORS

49%

MAMMOTH LAKES

25%

BISHOP

N=158

OUT-OF-STATE VISITORS

44%

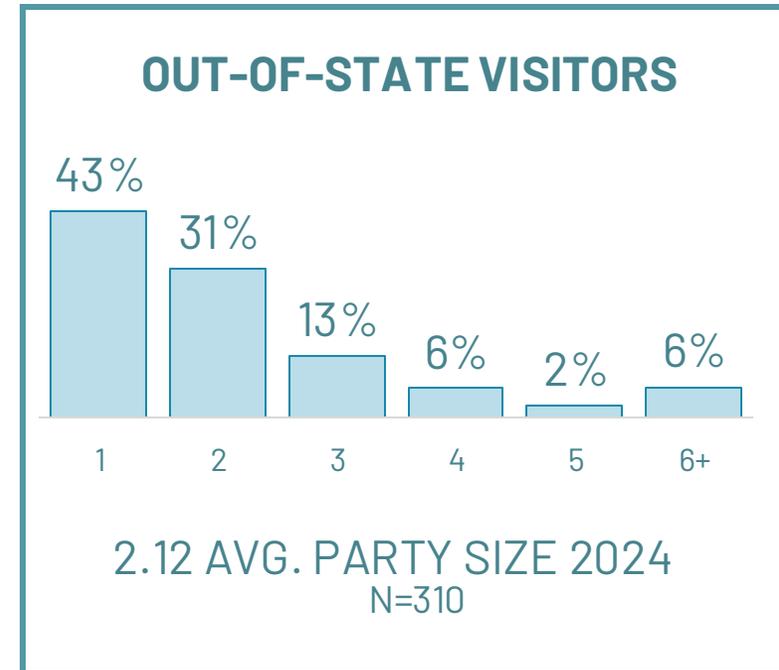
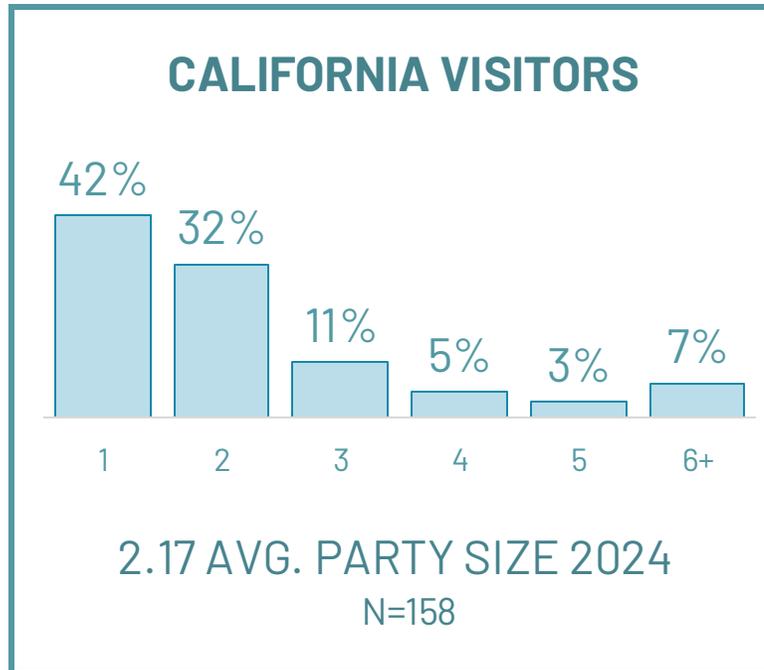
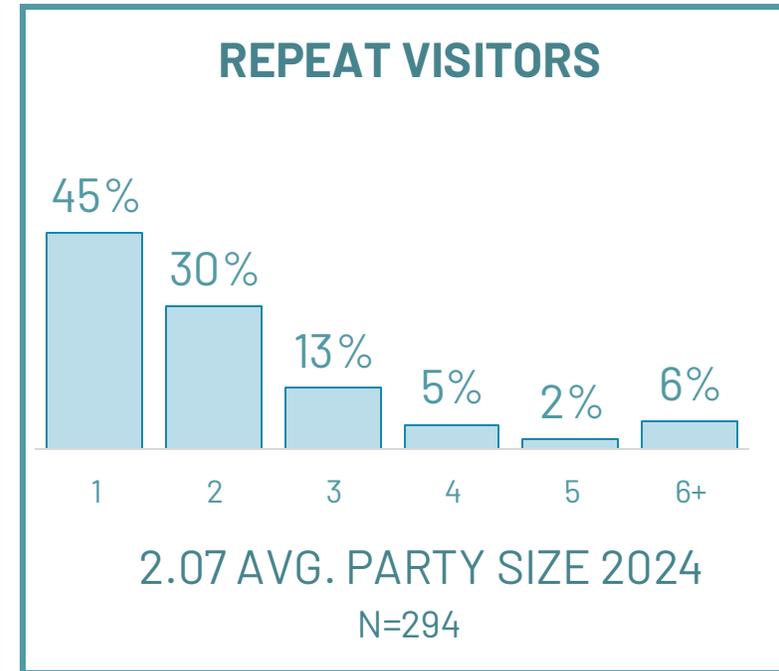
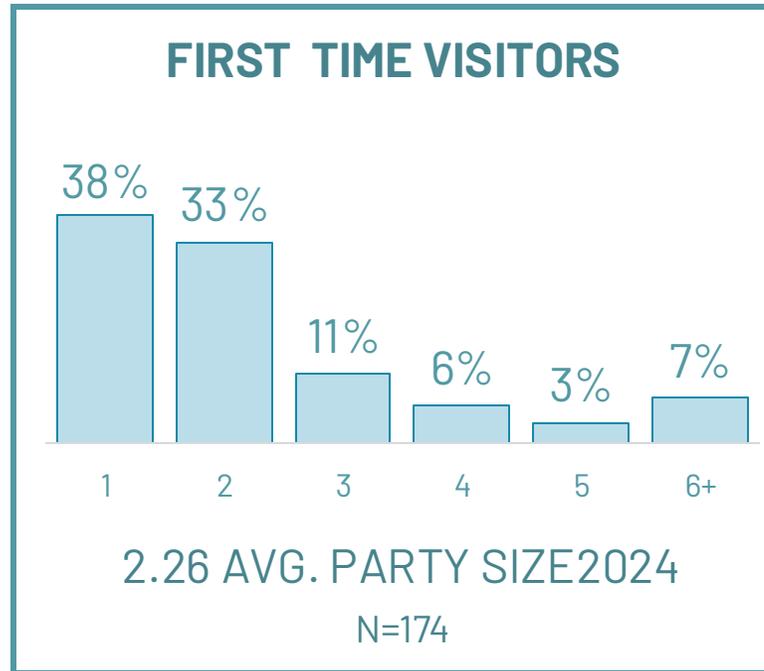
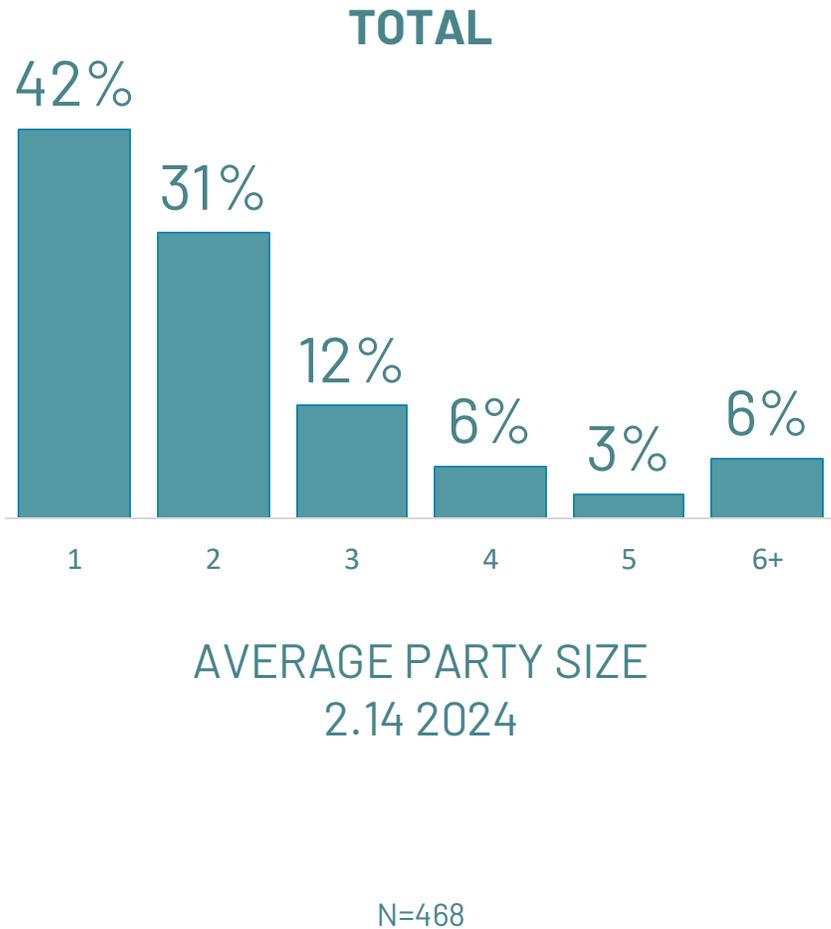
MAMMOTH LAKES

27%

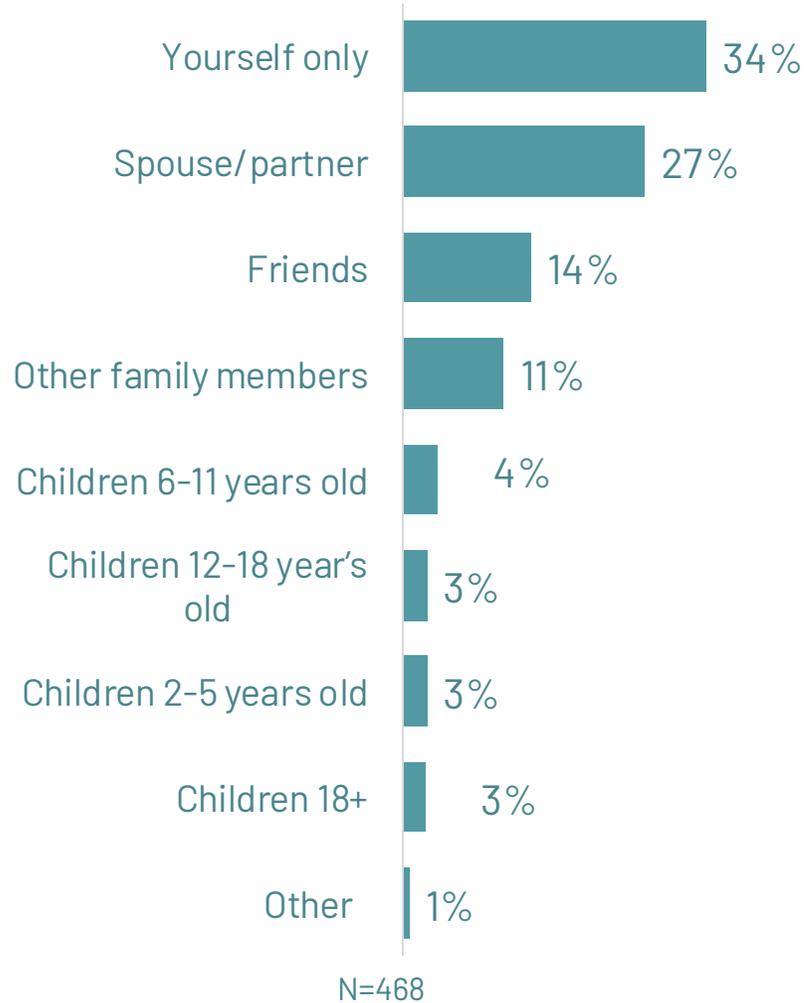
BISHOP

N=310

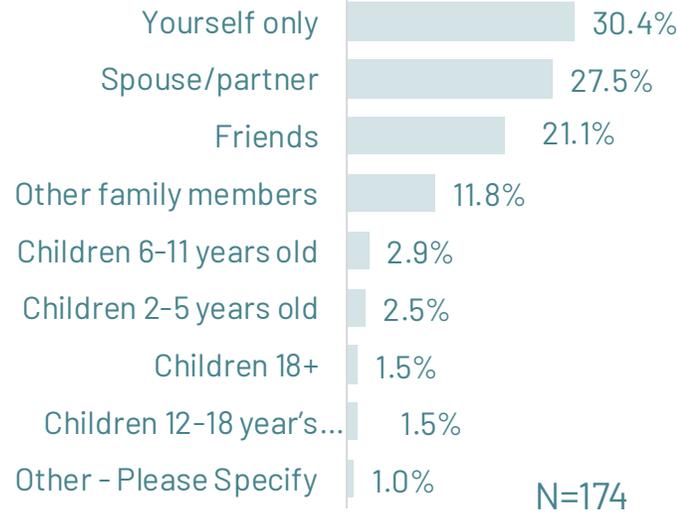
SUMMER PARTY SIZE



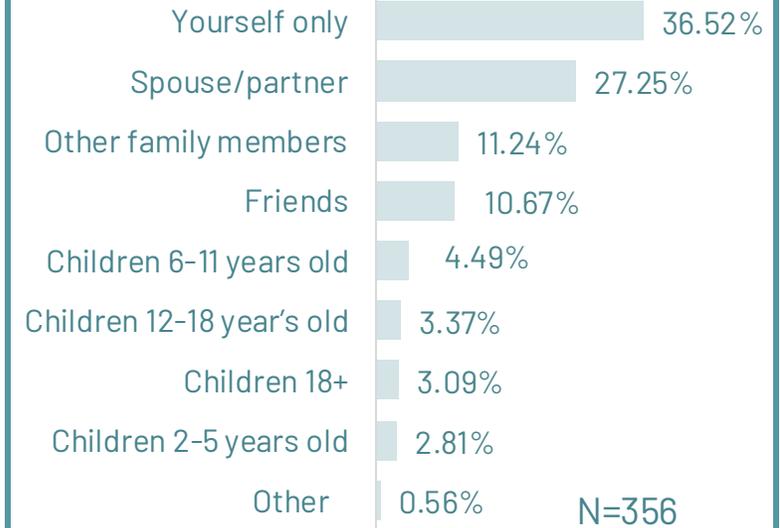
TRAVEL COMPANIONS



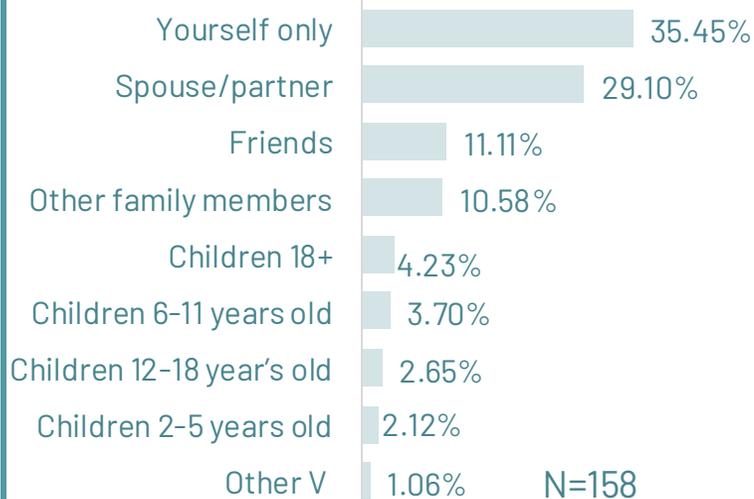
FIRST TIME VISITORS



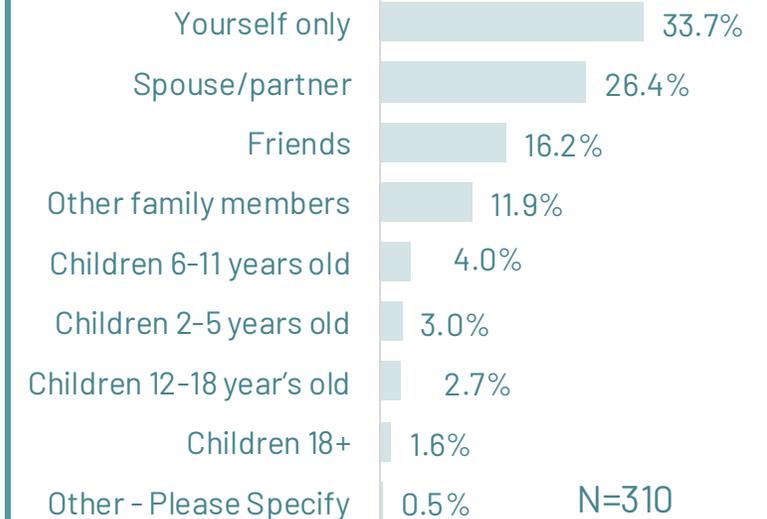
REPEAT VISITORS



CALIFORNIA VISITORS

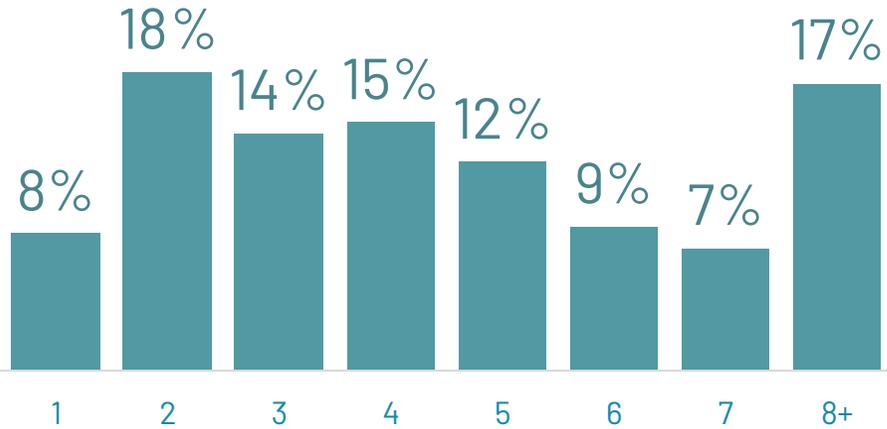


OUT-OF-STATE VISITORS



AVERAGE # NIGHTS

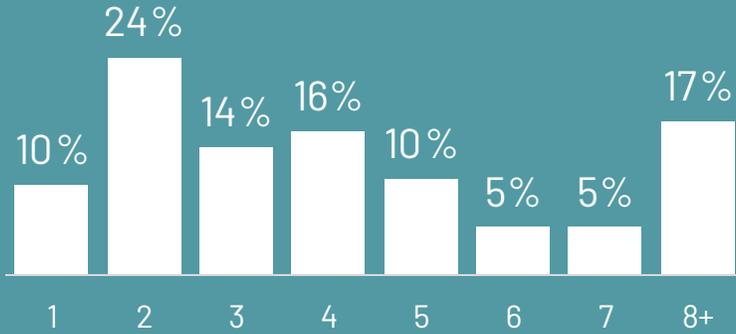
TOTAL



AVERAGE # NIGHTS
4.46 2024

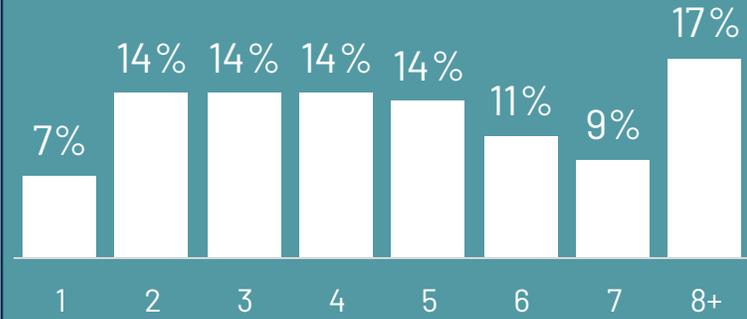
N=468

FIRST TIME VISITORS



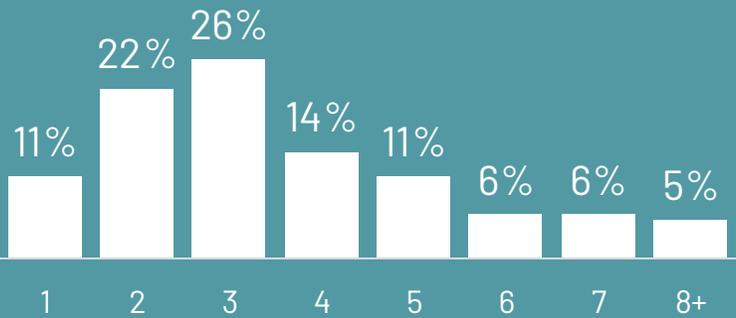
4.13 AVG. # NIGHTS
N=174

REPEAT VISITORS



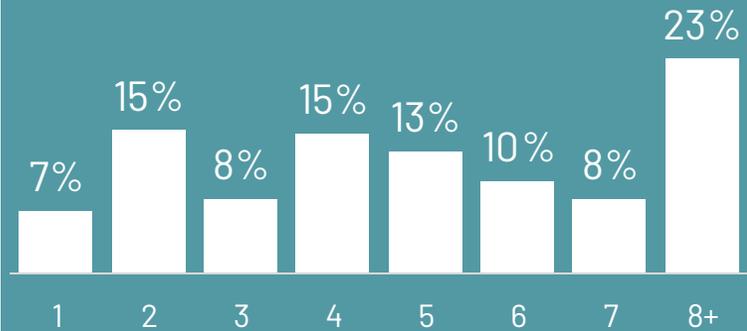
4.65 AVG. # NIGHTS
N=294

CALIFORNIA VISITORS



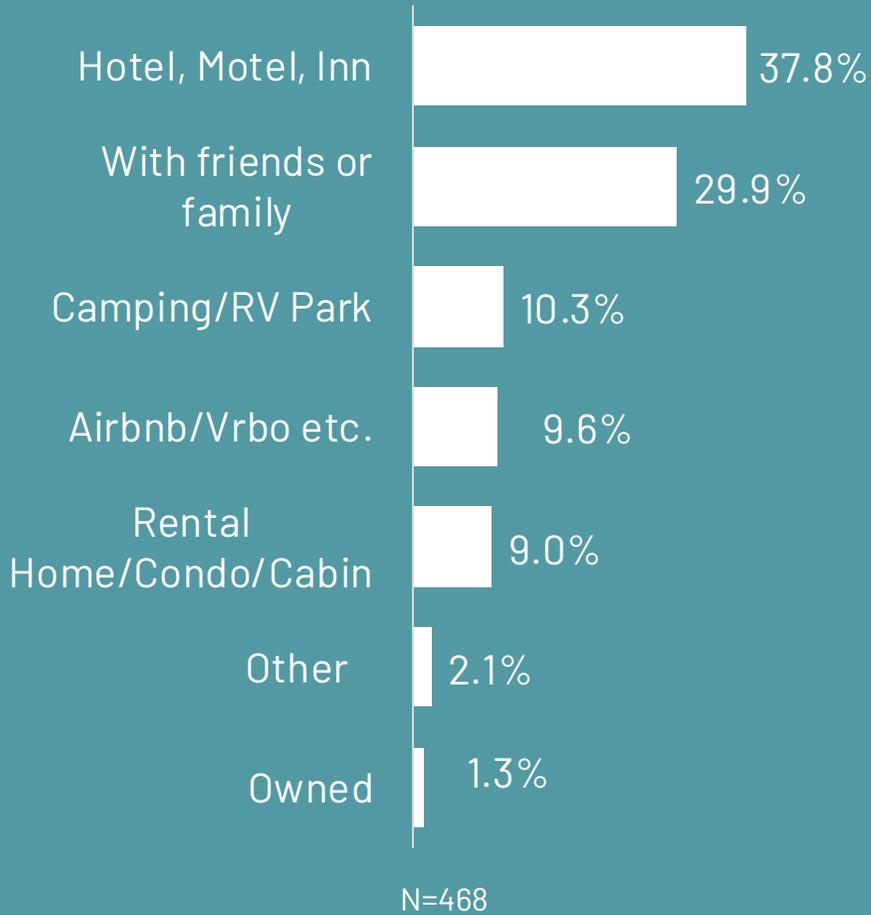
3.57 AVG. # NIGHTS
N=158

OUT-OF-STATE VISITORS

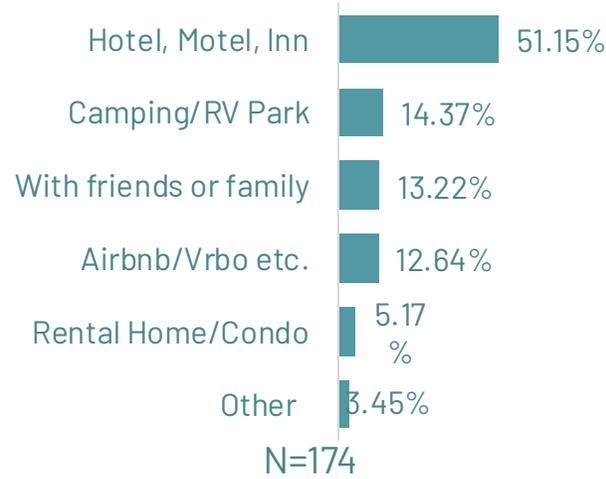


4.91 AVG. # NIGHTS
N=310

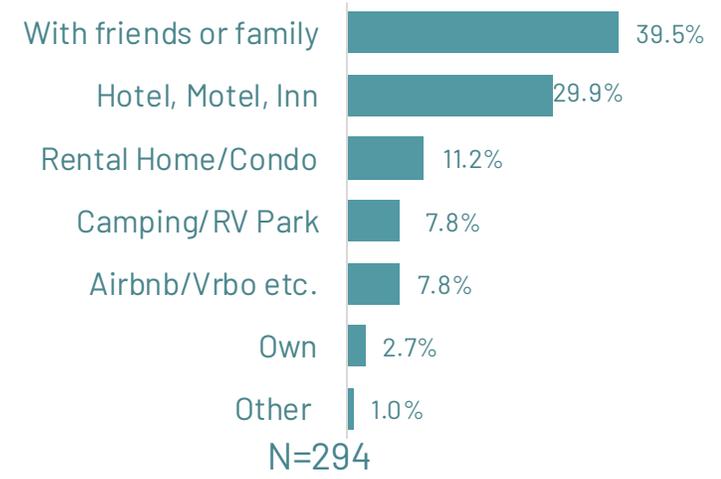
ACCOMMODATIONS



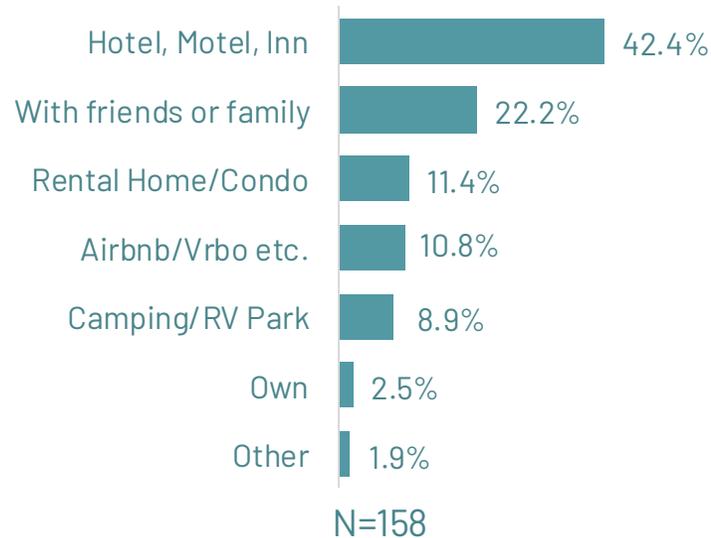
FIRST TIME VISITORS



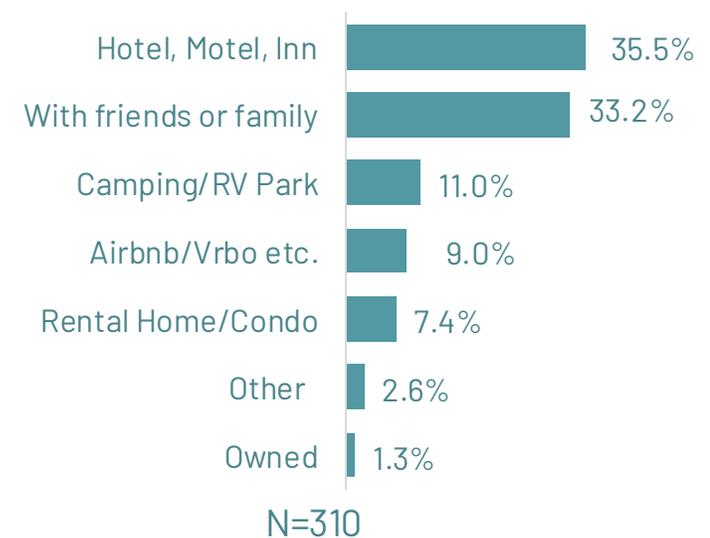
REPEAT VISITORS



CALIFORNIA VISITORS



OUT-OF-STATE VISITORS



LOCAL TRANSPORTATION



FROM AIRPORT

| | |
|------------------------------|--------|
| Friend's or Family's vehicle | 49.57% |
| Rental Car | 20.94% |
| Shuttle Service | 15.81% |
| Other. | 7.69% |
| Taxi | 3.63% |
| Uber/Lyft | 2.35% |

IN-TOWN

| | |
|-----------------------------------|--------|
| Friend's or Family's vehicle | 49.36% |
| Rental Car | 22.65% |
| Free Town Shuttle (Mammoth Lakes) | 8.33% |
| Shuttle Service | 7.91% |
| Other | 5.98% |
| Taxi | 3.42% |
| Uber/Lyft | 2.35% |

N=1178

VISITOR SPENDING



Mammoth Lakes[™]
CALIFORNIA

AVG. SPENDING/DAY SUMMER 2024 VS. SUMMER 2023



AVERAGE SPENDING/DAY DETAIL



| | TOTAL \$ | LODGING | RESTAURANTS | RETAIL | SIGHTSEEING ENTERTAINMENT | CAR RENTAL | GAS, PARKING TRANSPORTATION | OTHER |
|------------|-----------|-----------|-------------|----------|---------------------------|------------|-----------------------------|----------|
| TOTAL | \$ 432.22 | \$ 187.84 | \$ 87.48 | \$ 39.72 | \$ 39.72 | \$ 30.49 | \$ 23.07 | \$ 23.89 |
| LODGING | \$ 504.52 | \$242.92 | \$ 92.53 | \$ 39.23 | \$ 43.94 | \$ 36.01 | \$ 24.87 | \$ 25.01 |
| NO LODGING | \$ 185.66 | \$ 0.00 | \$ 70.24 | \$ 41.39 | \$ 25.33 | \$ 11.68 | \$ 16.96 | \$ 20.06 |

N= 419 TOTAL
 • 324 77% LODGING
 • 95 23% NO LODGING

2024 VS. 2023 - AVERAGE SPENDING/DAY



| | TOTAL | LODGING | RESTAURANT | RETAIL | SIGHTSEEING/ ENTERTAINMENT | CAR RENTAL | GAS, PARKING TRANSPORTATION | OTHER |
|-----------------------|--------|---------|------------|--------|-------------------------------|---------------|--------------------------------|--------|
| TOTAL | | | | | | | | |
| 2024 | 432.22 | 187.84 | 87.48 | 39.72 | 39.72 | 30.49 | 23.07 | 23.89 |
| 2023 | 467.95 | 152.13 | 115.76 | 68.49 | 38.49 | 28.35 | 41.83 | 22.94 |
| +/- | -7.6% | 23.5% | -24.4% | -42.0% | 3.2% | 7.5% | -44.8% | 4.1% |
| LODGING | | | | | | | | |
| 2024 | 504.52 | 242.92 | 92.53 | 39.23 | 43.94 | 36.01 | 24.87 | 25.01 |
| 2023 | 720.70 | 319.70 | 161.80 | 66.50 | 44.00 | 47.40 | 59.70 | 21.50 |
| +/- | -30.0% | -24.0% | -42.8% | -41.0% | -0.1% | -24.0% | -58.3% | 16.3% |
| NO LODGING | | | | | | | | |
| 2024 | 185.66 | 0 | 70.24 | 41.39 | 25.33 | 11.68 | 16.98 | 20.06 |
| 2023 | 362.7 | 0 | 120.66 | 102.27 | 48.48 | 24.09 | 41.48 | 27.73 |
| +/- | -48.8% | 0.0% | -41.8% | -59.5% | -47.8% | -51.5% | -59.1% | -27.7% |

SAMPLE SIZE: 2024 419 TOTAL, 324 LODGING, 95 NO LODGING
 2023 117 TOTAL, 73 LODGING, 44 NO LODGING

VISITOR DEMOGRAPHICS



Mammoth Lakes[™]
CALIFORNIA

DEMOGRAPHIC TREND

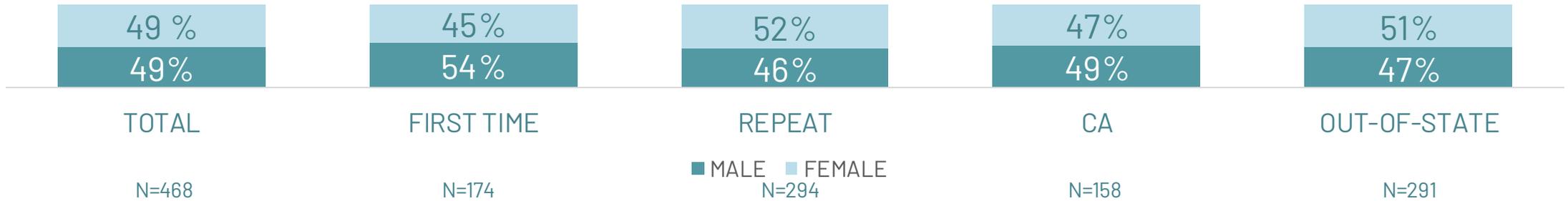


| |  2024 |  2023 |  2022 |  2024 |  2023 |  2022 |
|----------------|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| % MALE/FEMALE | 49%/49% | 57%/45% | 51%/47% | 49%/49% | 58%/41% | 54%/45% |
| SINGLE/MARRIED | 47%/49% | 39%/55% | 41%/53% | 47%/49% | 47%/44% | N/A |
| AVG. HH INCOME | \$163.5K | \$169.1K | \$150.4K | \$174.3K | \$165.4K | \$159.7K |
| GEN Z | 14% | 8% | 13% | 19% | 15% | 13% |
| MILLENNIAL | 44% | 55% | 44% | 42% | 48% | 59% |
| GEN X | 23% | 14% | 22% | 24% | 19% | 18% |
| BOOMERS | 19% | 22% | 19% | 15% | 17% | 10% |
| CAUCASIAN | 85% | 85% | 83% | 84% | 86% | 80% |
| HISPANIC | 4% | 6% | 5% | 4% | 2% | 3% |
| BLACK/AA | 1% | 1% | 3% | 2% | 1% | 1% |
| ASIAN | 8% | 4% | 6% | 8% | 7% | 13% |
| OTHER | 2% | 5% | 3% | 2% | 2% | 2% |

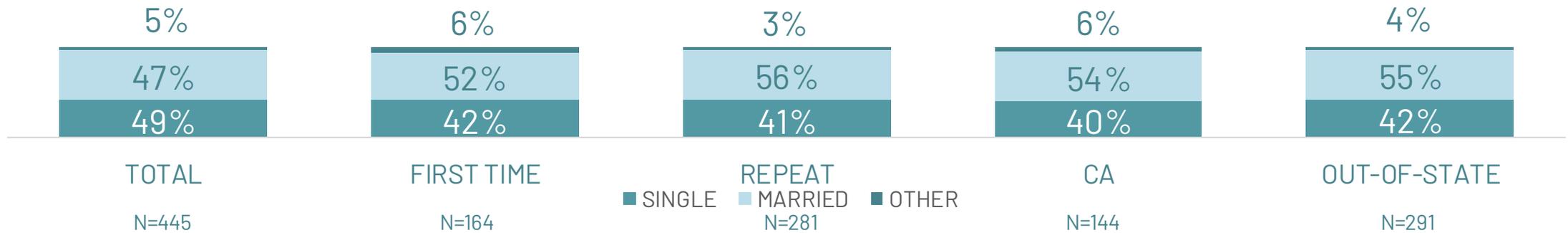
DEMOGRAPHICS



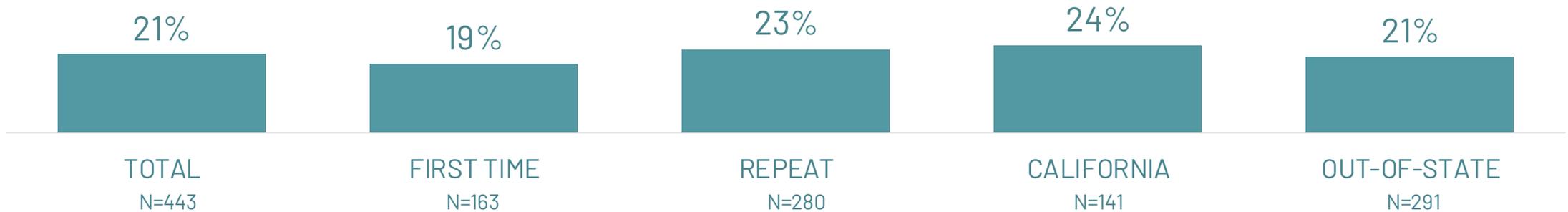
GENDER



MARITAL STATUS



CHILDREN IN HOUSEHOLD



DEMOGRAPHICS
AVG. HH INCOME

\$163.5K
N=395

FIRST TIME VISITORS
\$158.2K
N=144

REPEAT VISITORS
\$166.6K
N=250

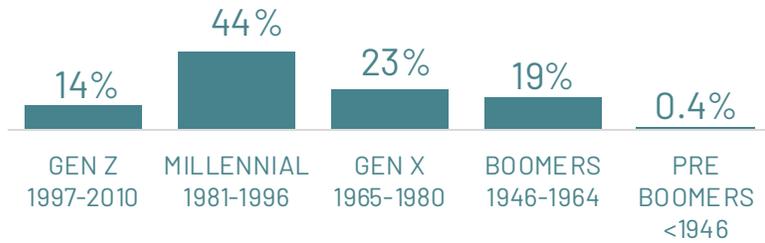
CALIFORNIA VISITORS
\$190.0K
N=129

OUT-OF-STATE VISITORS
\$150.7K
N=265

DEMOGRAPHICS - GENERATION

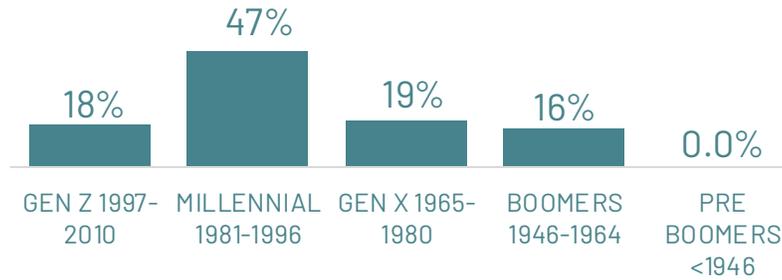


TOTAL GENERATION



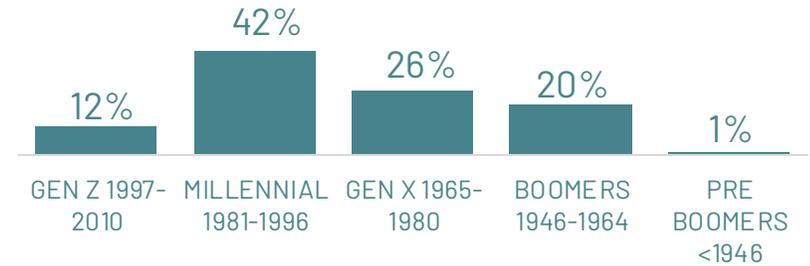
N=468

FIRST TIME



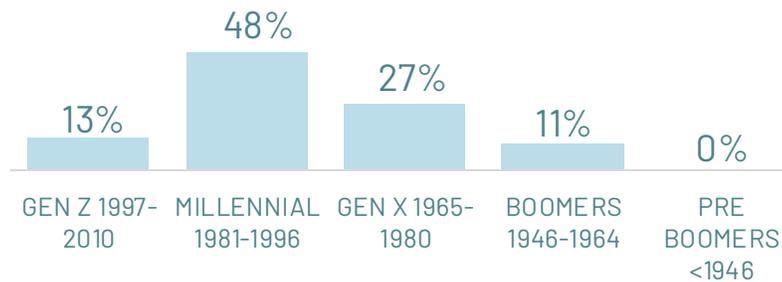
N=174

REPEAT



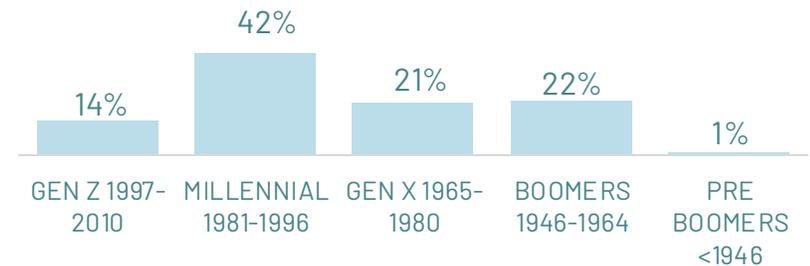
N=294

CALIFORNIA



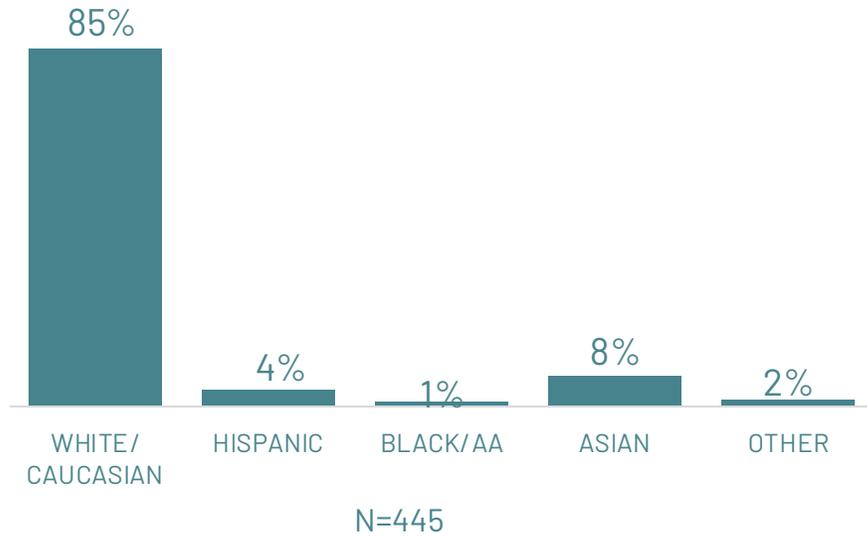
N=158

OUT OF STATE

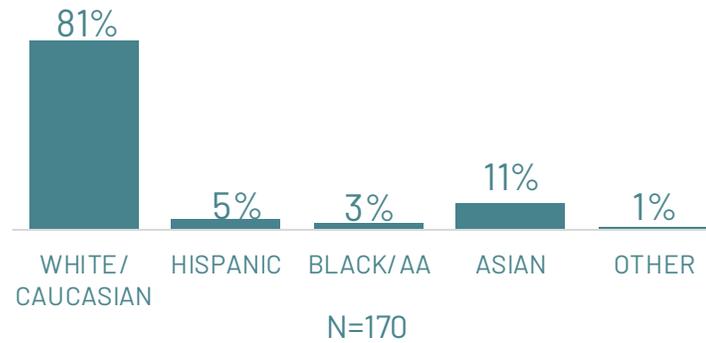


N=291

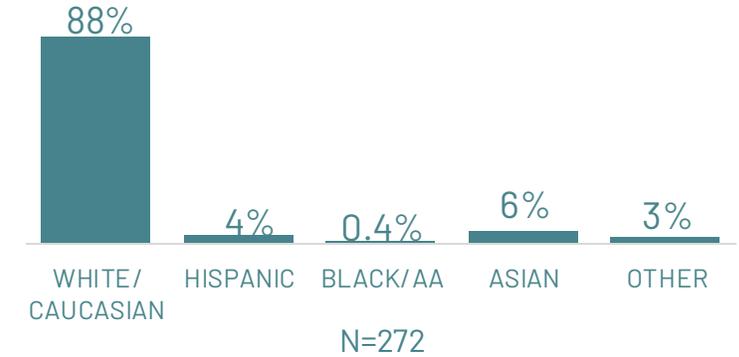
DEMOGRAPHICS - ETHNICITY



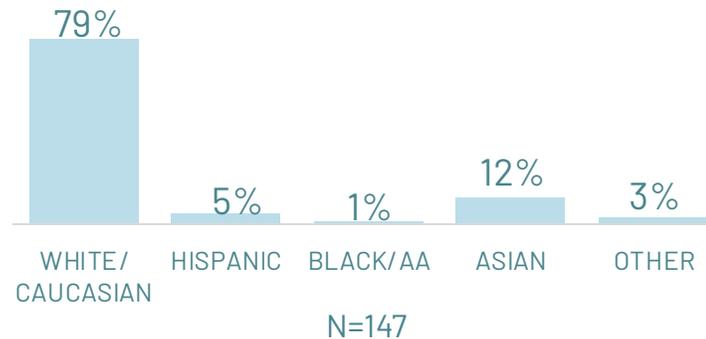
FIRST TIME VISITORS



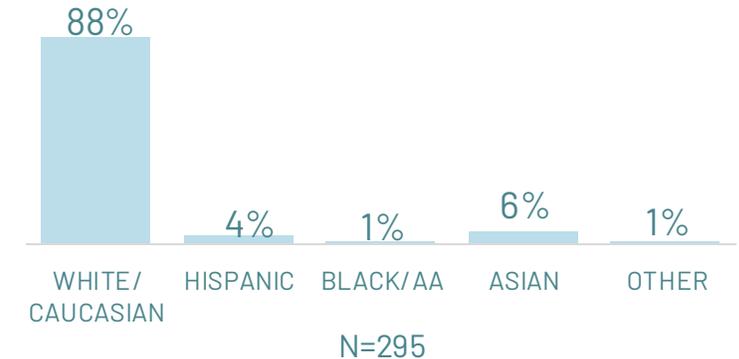
REPEAT VISITORS



CALIFORNIA VISITORS



OUT-OF-STATE VISITORS



EASTERN SIERRA REGIONAL AIRPORT & BISHOP

LOCALS & VISITORS

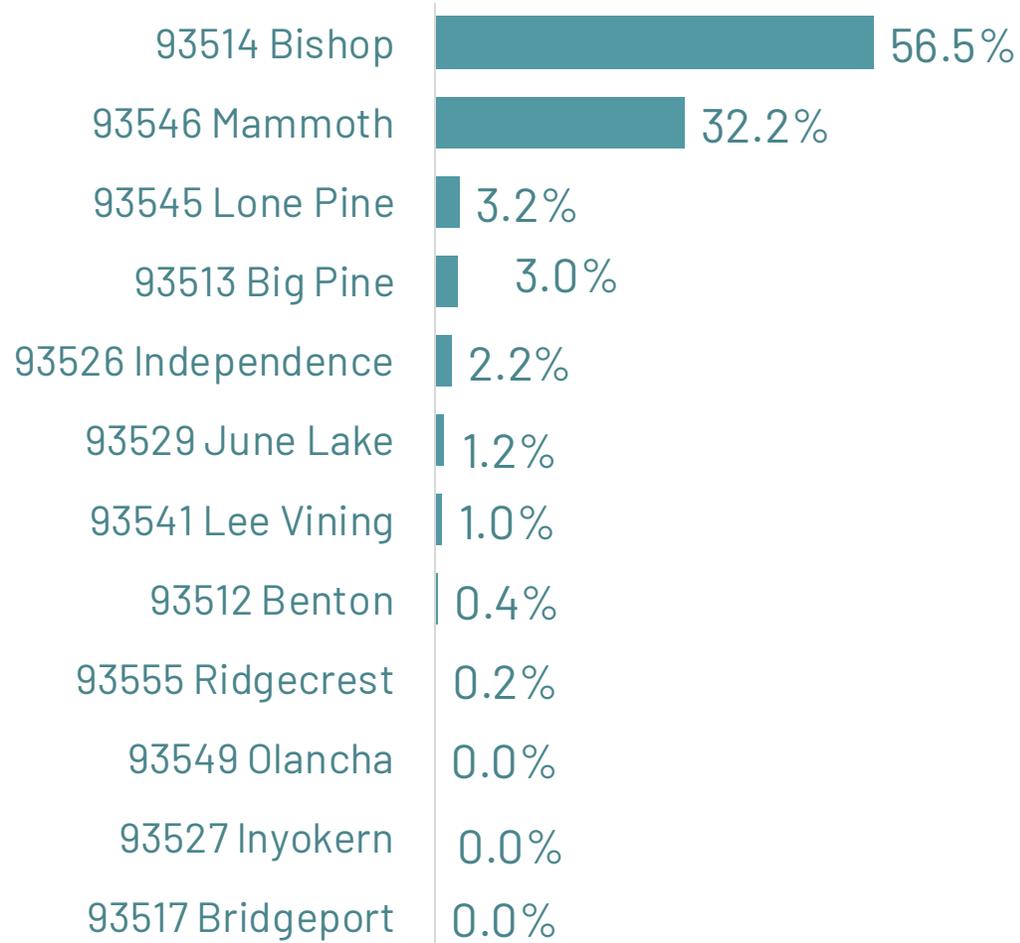


Mammoth Lakes[™]
CALIFORNIA

SUMMER 2024 - LOCALS



LOCAL ZIP CODES



N=497

25%

FIRST TIME USING BIH

N=497

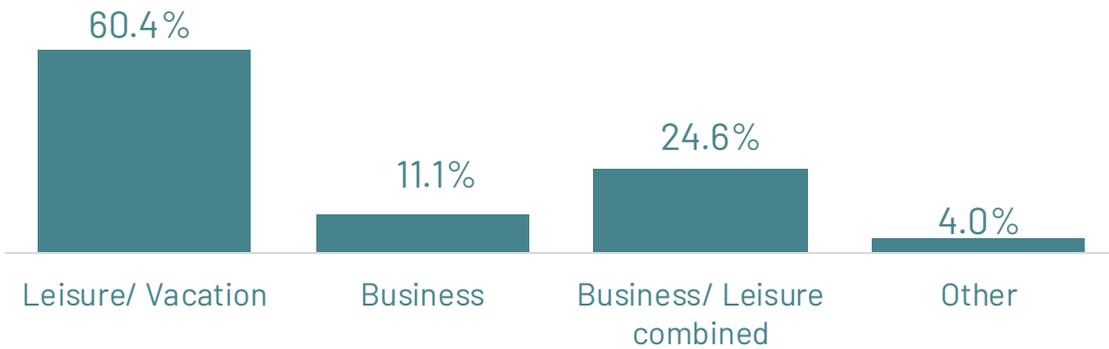
75%

TRIPS PAST YR

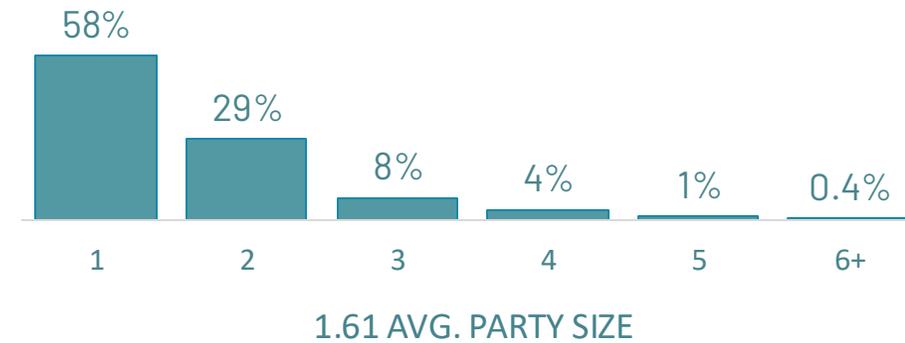
- 14% 1X/YR
- 40% 2-3X/YR
- 25% 3-5X/YR
- 21% 6+X/YR

N=371

TRIP PURPOSE



PARTY SIZE



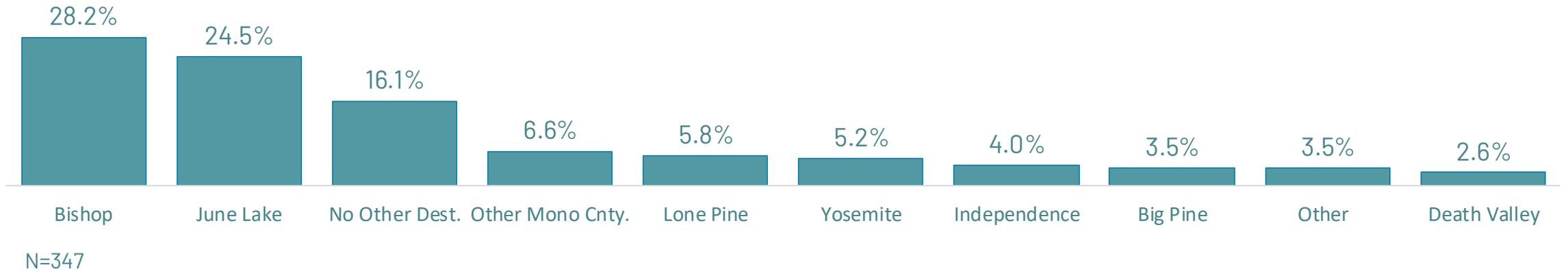
UNITED NET PROMOTER SCORE



SUMMER 2024 - VISITORS (Primary Mammoth)



59% WILL/DID VISIT OTHER AREA DESTINATIONS



BISHOP ACTIVITIES –WILL/DID VISIT

| | |
|---------------------------------------------------------|-------|
| Visit local restaurants | 32.7% |
| Visit local shops | 28.5% |
| Stay overnight in a hotel, motel, or inn | 10.3% |
| Rock climbing or Bouldering | 5.6% |
| Stay overnight in a rental Home/Condo, Airbnb/Vrbo etc. | 5.6% |
| Stay overnight camping/RV Park | 4.7% |
| Hiking/Backpacking | 4.7% |
| Other | 4.2% |
| Visit a museum | 3.7% |

N=214

SUMMER 2024 –VISITORS (Primary Bishop)



BISHOP ACTIVITIES – WILL/DID VISIT

| | |
|---------------------------------------------------------|-------|
| Visit local restaurants | 18.8% |
| Visit friends/family | 16.4% |
| Visit local shops | 15.2% |
| Stay overnight in a hotel, motel, or inn | 15.2% |
| Other | 11.3% |
| Rock climbing or Bouldering | 8.6% |
| Stay overnight camping/RV Park | 6.3% |
| Stay overnight in a rental Home/Condo, Airbnb/Vrbo etc. | 4.3% |
| Visit a museum | 3.9% |

N=256