



Mammoth Lakes Resident Sentiment

Table of Contents

- 3. Project Overview and Methodology
- 8. Key Findings
- 12. Overall Sentiment About Tourism
- 16. Tourism Development and Growth
- 20. Tourism Promotion
- 23. Economy
- 28. Tourism Employment
- 31. Quality of Life
- 35. Environment
- 39. Involvement/Engagement with Tourism
- 43. Business Owners
- 47. Mammoth Lakes Tourism
- 53. Real Unreal Campaign
- 55. What Residents Don't Know
- 60. Respondent Demographics
- 66. Appendix: Benchmarks



Project Overview and Methodology



Who We Are

Longwoods International History

Established in 1978 as a market research consultancy, Longwoods International is a premier market research firm that is a respected leader within the travel and tourism industry.

With headquarters in Columbus, Ohio and Toronto, Ontario and with offices across the U.S., Longwoods conducts strategic market research for public- and private-sector clients throughout North America, Europe and the Pacific Rim.

Longwoods International works with over 150 Destinations and Brands.

Destination Marketing Research Services

Longwoods is known for a multitude of destination marketing services, most notably:

- Overnight and day visitor profiles through **Travel USA**.
- **Return on Investment** of advertising campaigns.
- **Brand Health and Image Assessment** research provides insights into how travelers view leisure travel destinations, and measures advertising impact on a destination's image.
- **"Halo Effect"** of tourism advertising on a destination's image for broader economic development objectives.
- **Resident sentiment research**, which investigates both practical and emerging concerns among residents in a destination regarding tourism.

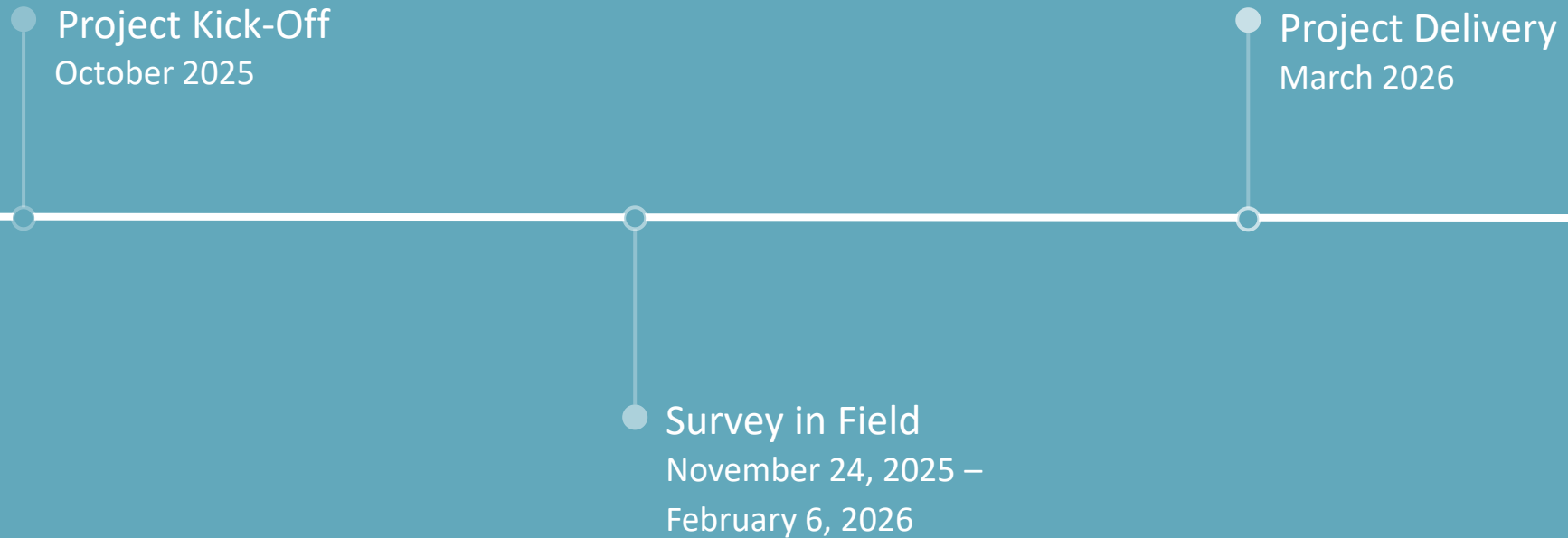
Longwoods International: The Gold Standard

Soundly grounded in scientific principles, our research methodologies have been peer-reviewed, intensely scrutinized by legislators and the media, and critically evaluated by academics and economists. Our scientific integrity has been recognized with numerous Best Practice awards, as well as invitations for speaking engagements across North America.

With the acquisition of **Clarity of Place**, **Longwoods** now also offers cutting-edge approaches to help destinations evaluate the alignment of the needs of visitors with those of residents, the community capacity for destination growth, the health of their brand, and their ability to remain competitive.

Mammoth Lakes

Resident Sentiment Project Timeline



Research Overview and Methodology

Resident Sentiment

Research Overview

Longwoods International's Resident Sentiment Research looks at both current and emerging sentiments towards tourism to help destination organizations keep their finger on the pulse of how residents feel about tourism in their communities. This study provides insights into residents' perceptions of tourism, both positive and negative, in areas including:

- Development and Growth
- Tourism Promotion
- Economy
- Tourism Employment
- Quality of Life
- Environment
- Resident Involvement/Engagement

Survey Methodology

A self-completion survey was completed by 295 adults (18 years and older) who live in/own a residence in Mammoth Lakes or own a business that operates in Mammoth Lakes.

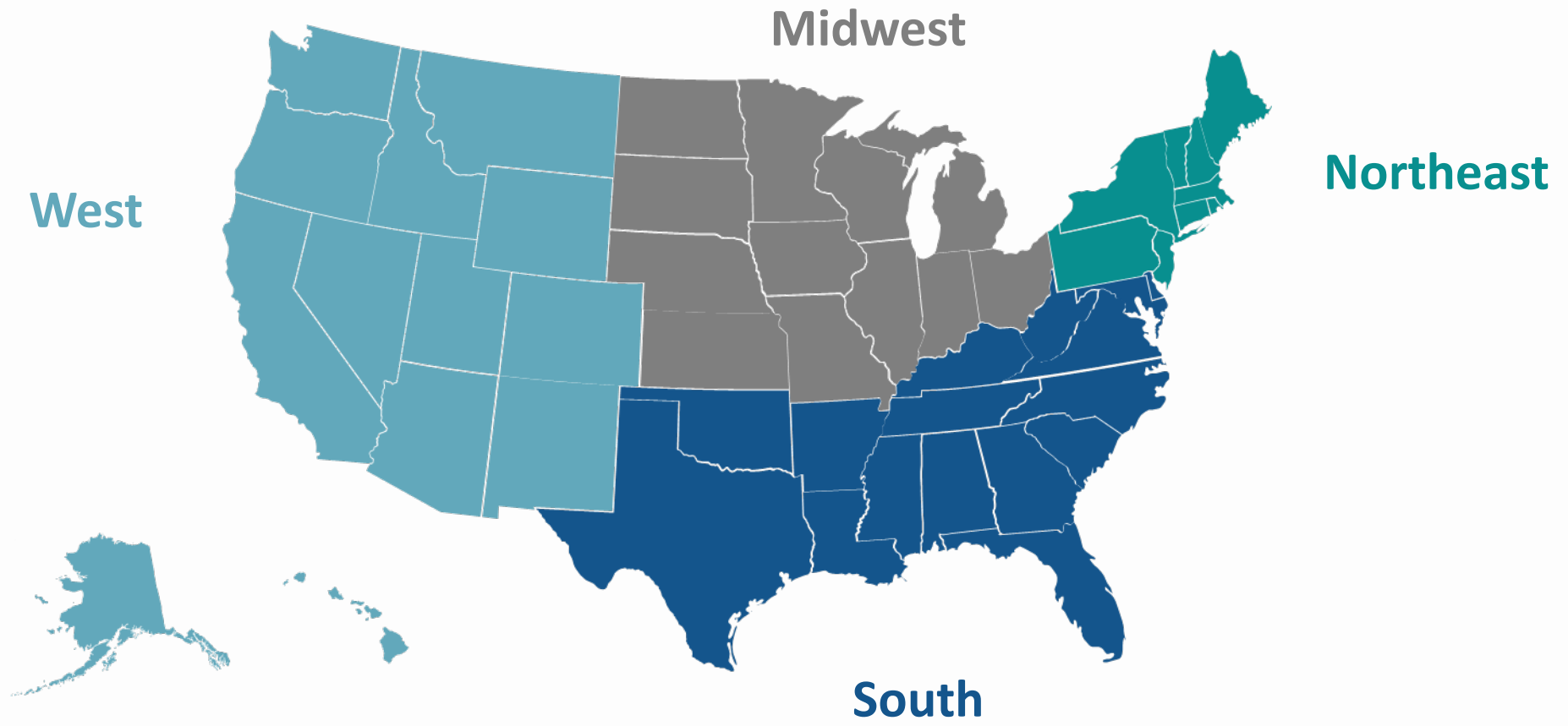
- Second homeowners: 58
- Business owners: 63

Fieldwork was completed between November 24, 2025 and February 6, 2026.

Mammoth Lakes Tourism, along with their community partners, distributed the survey via Mammoth Lakes Tourism's Annual Report, social media and other distribution channels. A \$500 Yiftee gift card was offered as an incentive to participate in the survey. Respondents provided their email address to enter the drawing.

A separate national study was conducted in July 2025, which provides regional and national norms against which Mammoth Lakes' results are compared.

Regions



An aerial photograph of a dense, lush green forest. A light-colored, unpaved road or path winds through the trees, curving from the left towards the right. The trees are a mix of dark green and lighter green, suggesting different species or stages of growth. The lighting is bright, creating high contrast between the dark shadows of the trees and the sunlit areas.

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Key Findings

Key Findings Summary



Overall Sentiment About Tourism

- Two-thirds (67%) agree Mammoth Lakes benefits from a strong visitation industry.
- 61% think visitation is good for the local area, and 59% want to see visitation thrive.
- However, 41% believe positive benefits outweigh negative impacts.
- Critical gap: 20% agree local government is doing a good job balancing resident quality of life and visitor satisfaction, 22 points below West (42%) and 21 points below US norm (41%).



Tourism Promotion

- 67% understand that Tourism Business Improvement District (TBID) funds tourism marketing efforts.
- 47% believe Mammoth Lakes Tourism is doing a good job at promoting tourism to the area.
- Critical gap: 27% agree tourism marketing reflects diversity in the local area, 31 points below West (58%) and 27 points below US norm (54%).
- Positive note: 54% have seen Real Unreal campaign messaging or advertising, and 61% think it accurately represents the message Mammoth Lakes wants to send to visitors.
 - Social Media was the highest viewed source at 83%.



Tourism Development and Growth

- 82% agree planned and controlled tourism development is needed, 23-24 above benchmarks.
- 56% report tourism development happening too fast, 25-27 points above benchmarks.
- 49% believe visitation should be encouraged in the area.
- Critical gap: Only 17% believe residents are consulted when major tourism development takes place in the area, 15-16 points below benchmarks.



Economy

- 84% say housing is becoming less affordable due to tourism, 39-45 points above benchmarks (West 45%, US 39%).
- 55% agree the economic impact of visitors helps support industries and businesses not directly related to tourism.
- 48% understand that Transient Occupancy Tax (TOT) is used to help pay for local services.
- Critical gap: Only 28% believe taxes that tourists pay adequately compensate for infrastructure wear and tear.

Key Findings Summary (Cont'd)



Tourism Employment

- 72% agree most jobs in the tourism industry are low-paying and seasonal, 23-25 points above benchmarks (West 49%, US 47%).
- 32% see career advancement opportunities, 19-21 points below benchmarks (West 53%, US 51%).
- Critical gap: 71% acknowledge the tourism industry offers many entry-level employment opportunities, however, only 22% would encourage friends and family to work in the tourism industry, 18-19 points below benchmarks (West 41%, US 40%).



Environment

- 69% agree long-term planning can limit environmental impacts caused by tourism.
- 38% view tourism as a good alternative to more environmentally-damaging development.
- Critical gap: Only 22% believe the tourism industry values sustainability and natural resources, 21 points below benchmarks (West 43%, US 43%).



Quality of Life

- 64% believe uncontrolled visitor growth is jeopardizing heritage and culture.
- 28% agree that quality of life has improved because of increased tourism, and 38% agree the quality of public services has improved from more tourism.
- Positive notes: 35% acknowledge better dining opportunities and more recreational opportunities as a result of tourism.



Involvement/Engagement with Tourism

- 89% are proud to call the area home, and 88% look forward to showing off the area when friends and family visit.
- 64% recommend local tourist sites to people who are visiting the area.
- 72% are proud of what Mammoth Lakes' offers visitors.
- 67% are interested in finding out what's happening when they come across local tourism news, 12-13 points above benchmarks.
- Positive note: 63% welcome tourists to Mammoth Lakes.



Business Owners

- 21% report having an extremely high level of understanding of how TBID assessed dollars are used (rating 5 out of 5).
- 41% cited positive impacts in relation to how TBID-funded destination marketing has benefited their business.
- Critical gap: Only 33% of business owners feel their TBID assessment provides a positive impact on them, their business, and the community.

Next Steps to Consider



Establish Community Advisory Board Geared Towards Tourism Awareness

- **Publish transparency reports** that highlights how resident input has shaped tourism decisions, helping respond to the concern that only 20% feel government is balancing resident quality of life with visitor satisfaction.
- **Host regular "Tourism Town Halls"** modeled on the existing community coffee sessions (attended by 28% of residents), but with structured agenda items that allow residents to vote on priority concerns and track follow-up actions.



Improve Transparency and Communication Around TOT and TBID Spending

- **Launch TOT and TBID education program** using infographics distributed through the top communication channels such as social media, monthly newsletters, and weekly occupancy emails showing exactly how TOT and TBID funds are allocated.
- **Offer TBID information sessions or one-on-one business consultations** to walk assessed businesses through how funds are used and how they can better leverage TBID-funded programs.



Reframe the Narrative Around Tourism's Community Benefits

- **Quantify and publicize the "invisible" benefits of tourism** such as air service support, road maintenance, emergency services funding, and cultural programming that might not be immediately associated with visitor spending.
- **Use narrative-driven storytelling to highlight resident benefits** featuring specific, tangible examples of how tourism revenues fund community services, build workforce housing, maintain trails, and support local businesses.



Elevate and Expand Environmental Sustainability Efforts

- **Implement visitor education programs at key access points** such as trail etiquette information at trailheads, permit stations, and lodging check-ins.
- **Create visible "green certification" or recognition programs** for tourism businesses that demonstrate sustainability practices and to promote these leaders in resident- and visitor-facing channels so the community can see which operators are "walking the talk" on environmental responsibility.

An aerial photograph of a coastline at sunset. The sun is low on the horizon, casting a warm orange glow over the scene. In the foreground, the wing and tail of an airplane are visible, suggesting the view is from a window. The coastline below features a mix of greenery, buildings, and rocky outcrops in the water.

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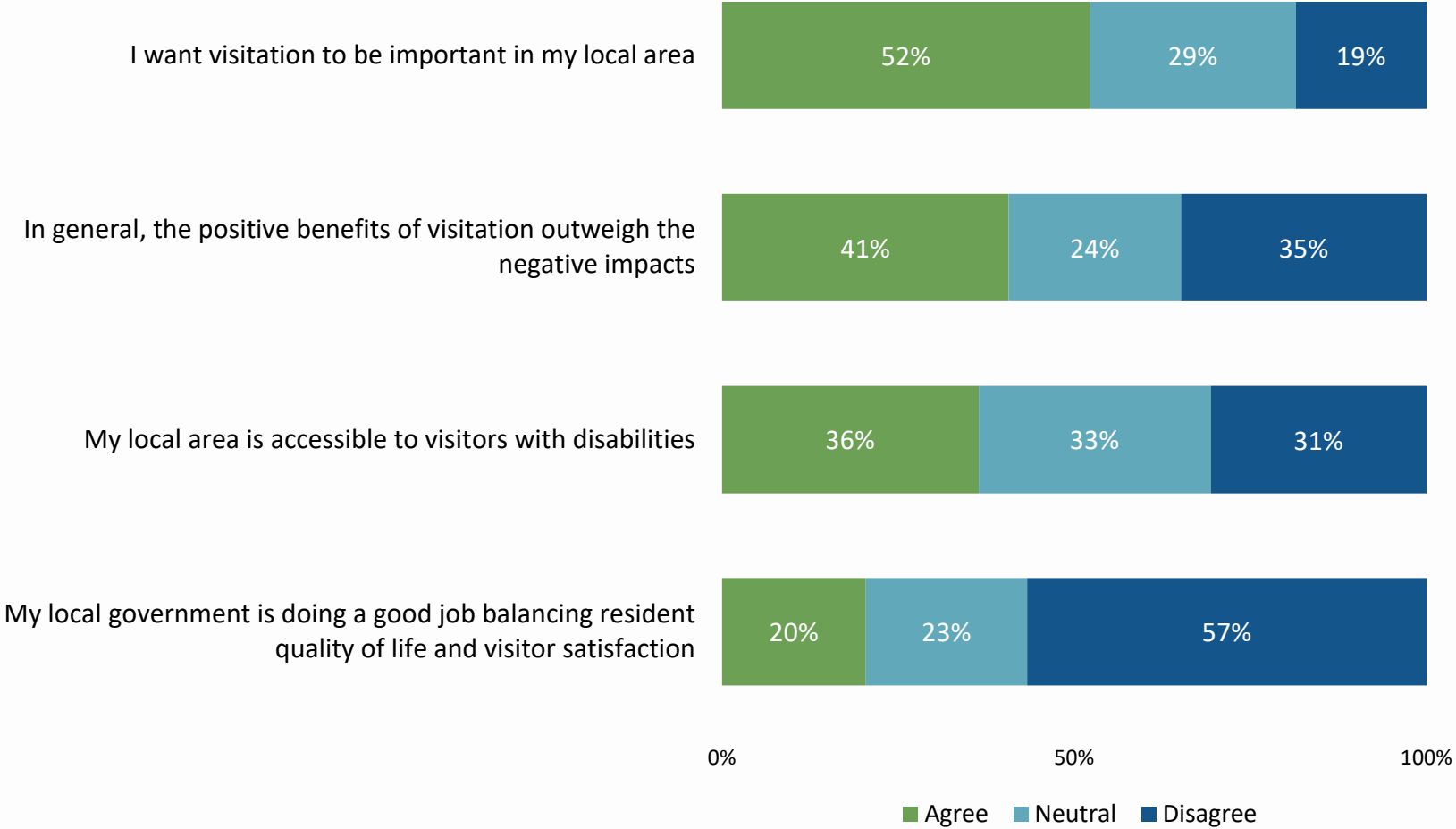
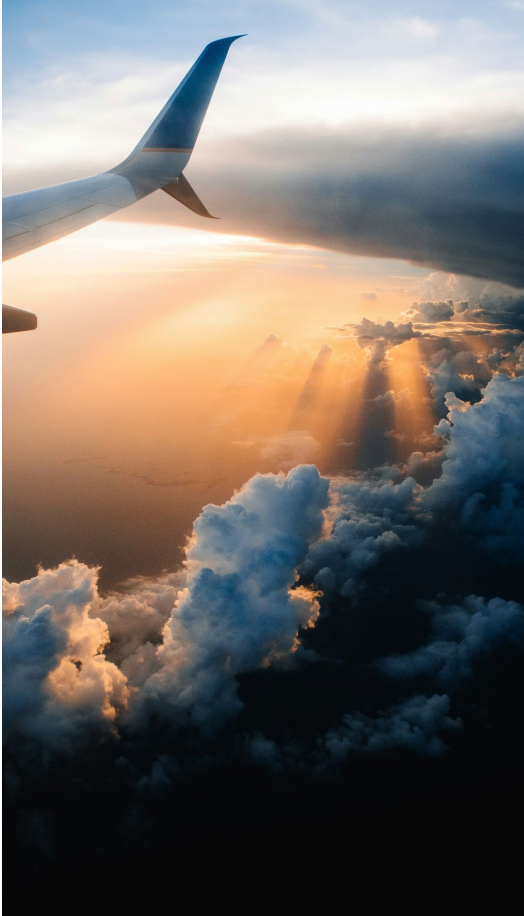
Overall Sentiment About Tourism

Overall Sentiment About Tourism

About two-thirds (67%) recognize Mammoth Lakes benefits from a strong visitation industry. Similarly, many residents also care about the success the tourism industry provides to the local business community (66%) and generally view visitation as good (61%). However, a notable disconnect emerges when residents evaluate visitation's overall impact: 41% believe positive benefits outweigh negative impacts, with 35% disagreeing. Additionally, 36% feel the area is accessible to visitors with disabilities and 13% don't know, suggesting opportunities for accessibility improvement.



Overall Sentiment About Tourism (Cont'd)

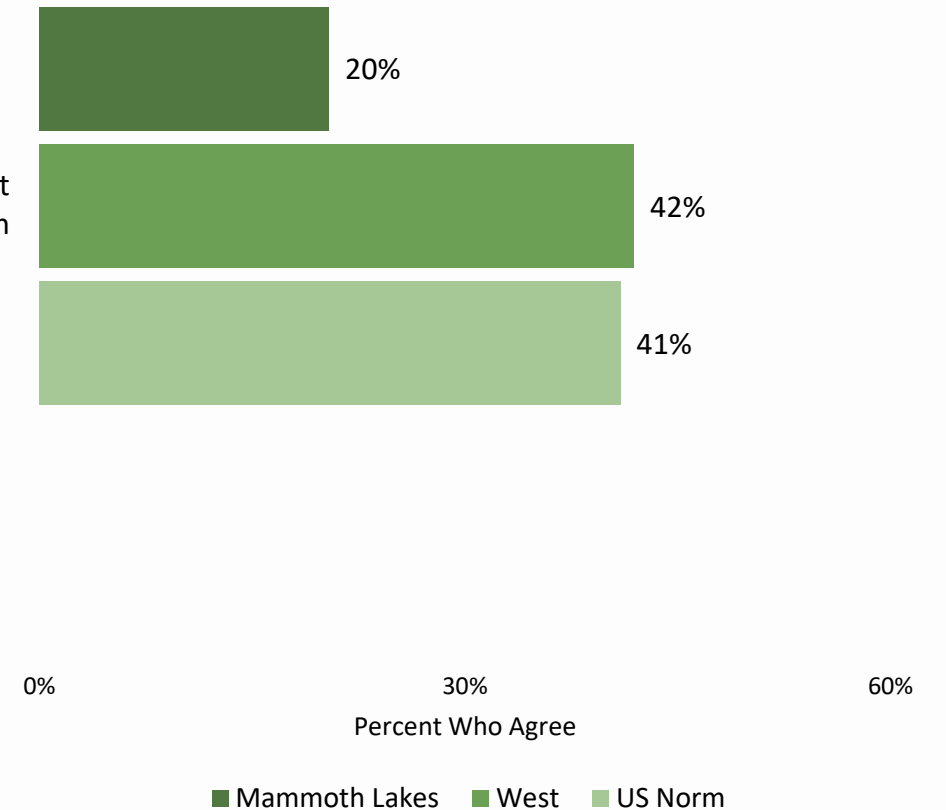


Overall Sentiment About Tourism

Benchmarks

Only 20% believe local government is doing a good job balancing resident quality of life and visitor satisfaction, a dramatic 22-point gap below West regional benchmarks (42%) and 21 points below US norms (41%). This critical finding reveals residents perceive tourism management as inadequately protecting community interests, despite overall recognition of visitation's economic importance to the area.

My local government is doing a good job balancing resident quality of life and visitor satisfaction



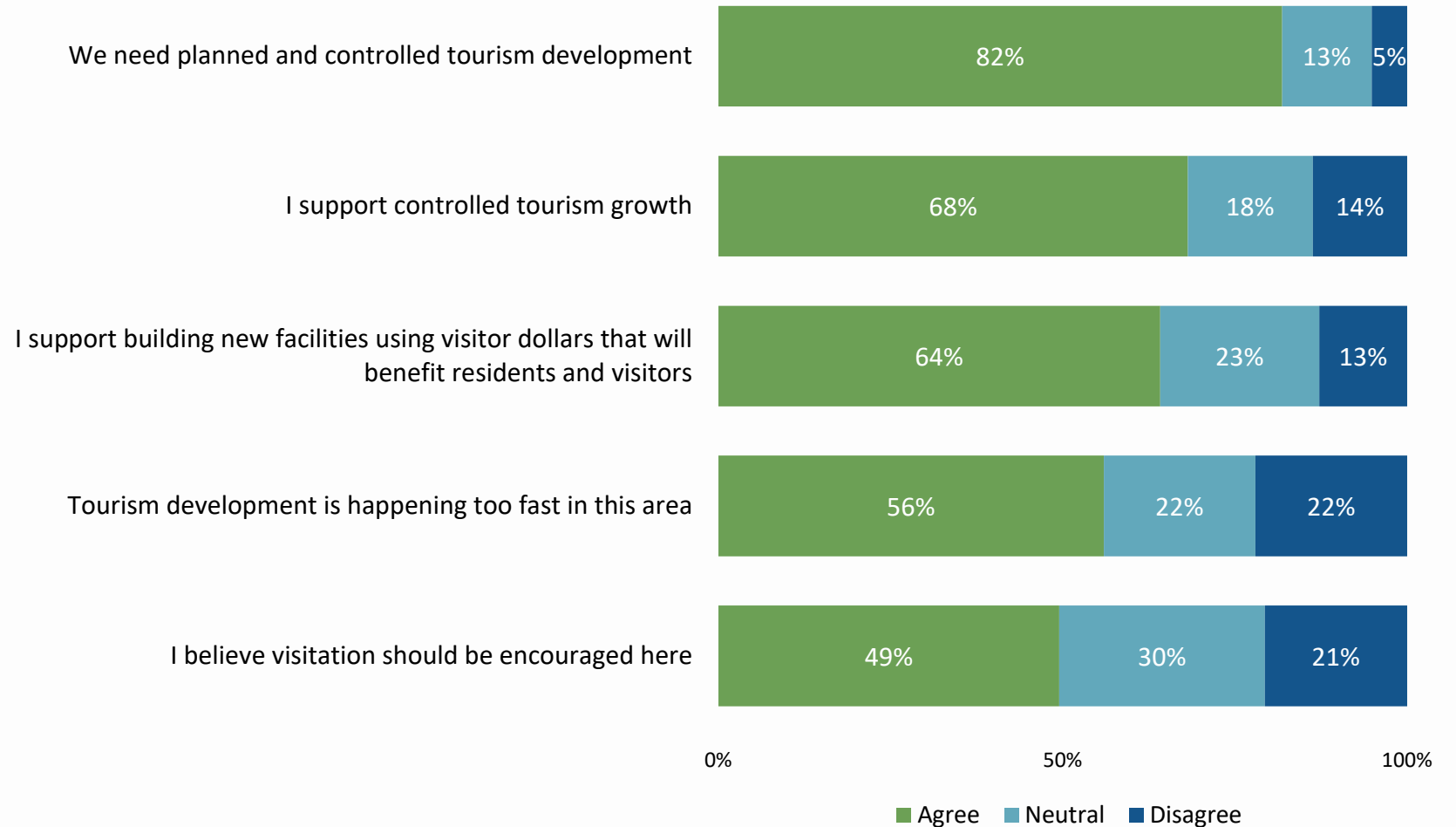


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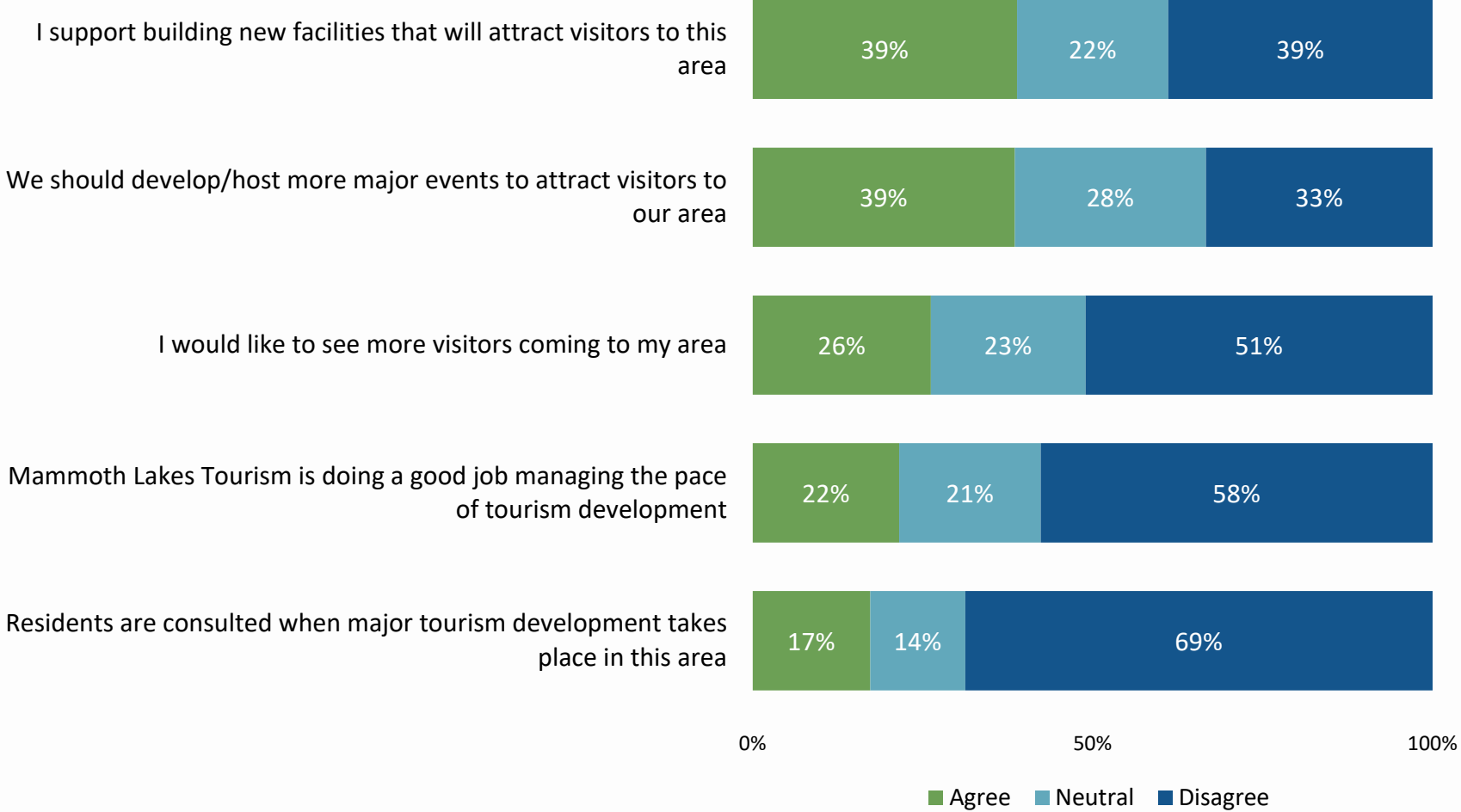
Tourism Development and Growth

Tourism Development and Growth

Residents express strong need for planned and controlled tourism development (82% agree). More than two-thirds (68%) support controlled tourism growth, and 64% support building new facilities using visitor dollars that will benefit residents and visitors. However, 56% report tourism development happening too fast, and less than half (49%) believe visitation should be encouraged. Concerningly, only 22% believe Mammoth Lakes Tourism manages tourism development pace well, with 58% disagreeing. While residents support visitation, the strong preference is for planned, controlled approaches that prioritize community benefit.



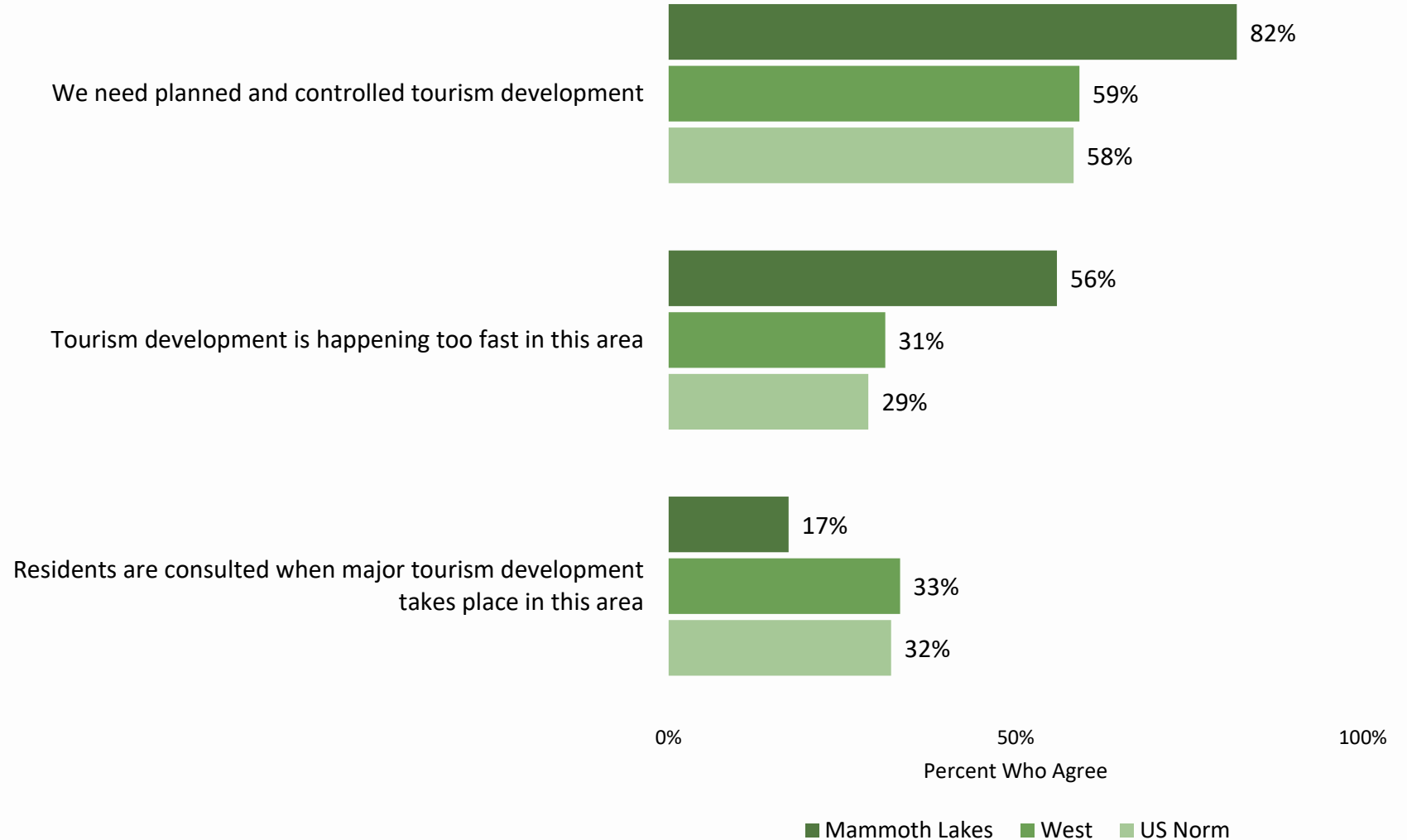
Tourism Development and Growth (Cont'd)



Tourism Development and Growth

Benchmarks

While 82% need planned and controlled tourism development, 23 points higher than the West (59%) and 24 points higher than US norms (58%), 56% report tourism development happening too fast, dramatically outpacing West (31%) and US benchmarks (29%) by 25-27 points. Concerningly, only 17% believe residents are consulted when major tourism development takes place, compared to 33% in the West and 32% nationally. These findings reveal residents want tourism but feel current growth is poorly managed and happening too rapidly without adequate planning or resident input.



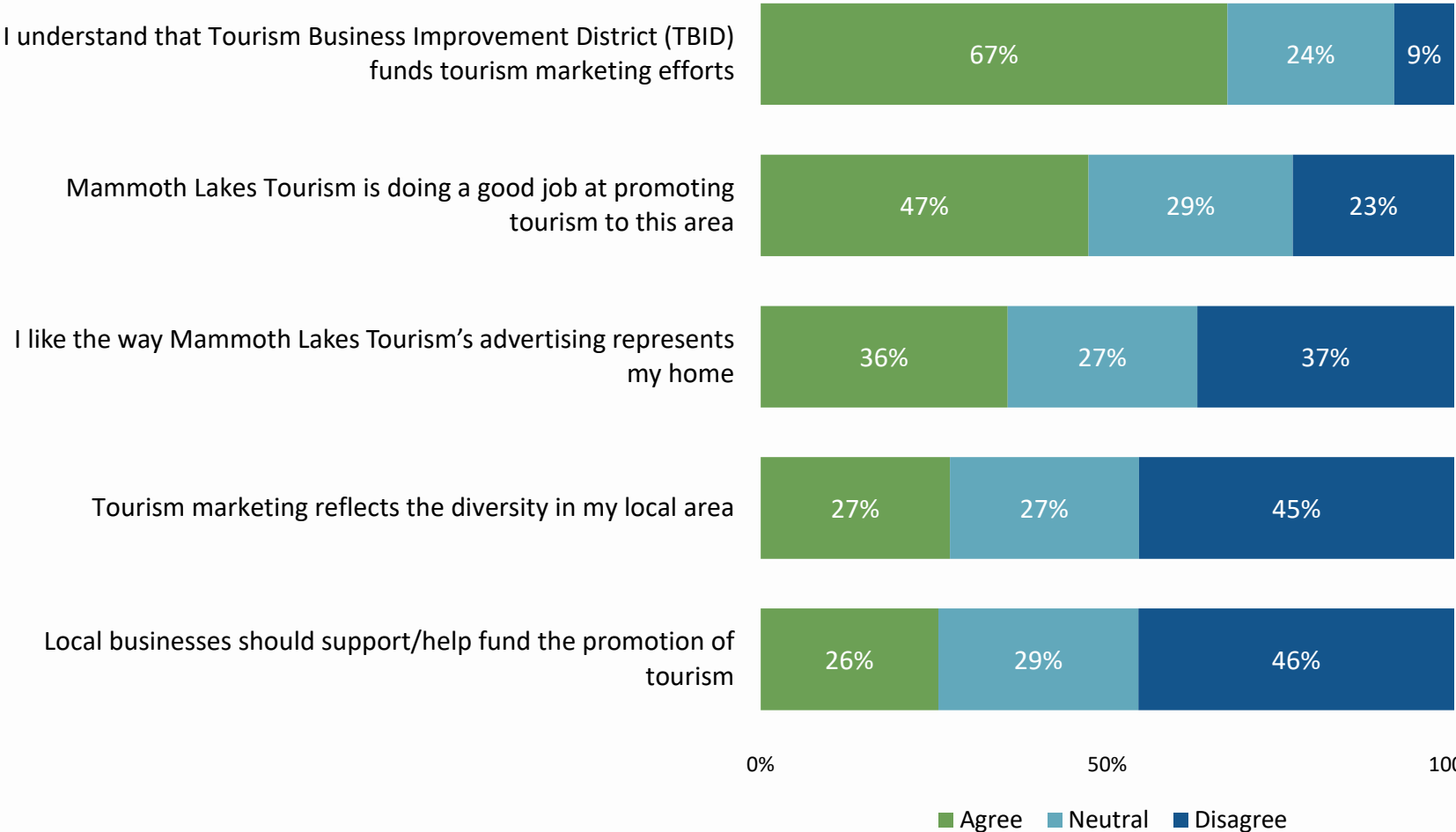
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Tourism Promotion



Tourism Promotion

About two-thirds (67%) understand that Tourism Business Improvement District (TBID) funds tourism marketing efforts. Less than half (47%) believe Mammoth Lakes Tourism is doing a good job at promoting tourism to the area, and 36% like the way the advertising represents their home. Only 27% feel tourism marketing reflects community diversity. Notably, just 26% believe local businesses should support or help fund the promotion of tourism, with 46% disagreeing. This could suggest residents and business owners question whether investment in attracting more visitors aligns with community priorities.

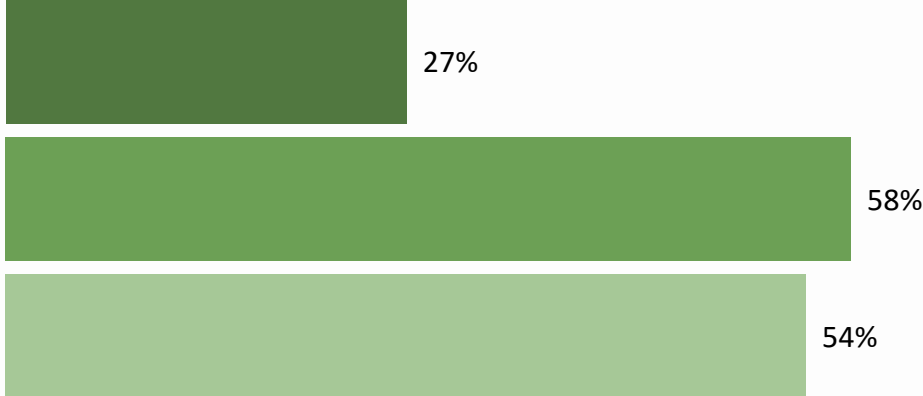


Tourism Promotion

Benchmarks

Only 27% agree tourism marketing reflects diversity in the local area, 31 points below the West (58%) and 27 points below US norms (54%). The 45% opposition (disagree) rate, combined with the dramatic benchmark gaps, suggests significant resident concern that current marketing does not authentically represent the community's full demographic composition. This gap presents an opportunity to develop more inclusive marketing strategies that better reflect and resonate with the diverse Mammoth Lakes community.

Tourism marketing reflects the diversity in my local area



0% 30% 60%

Percent Who Agree

■ Mammoth Lakes ■ West ■ US Norm

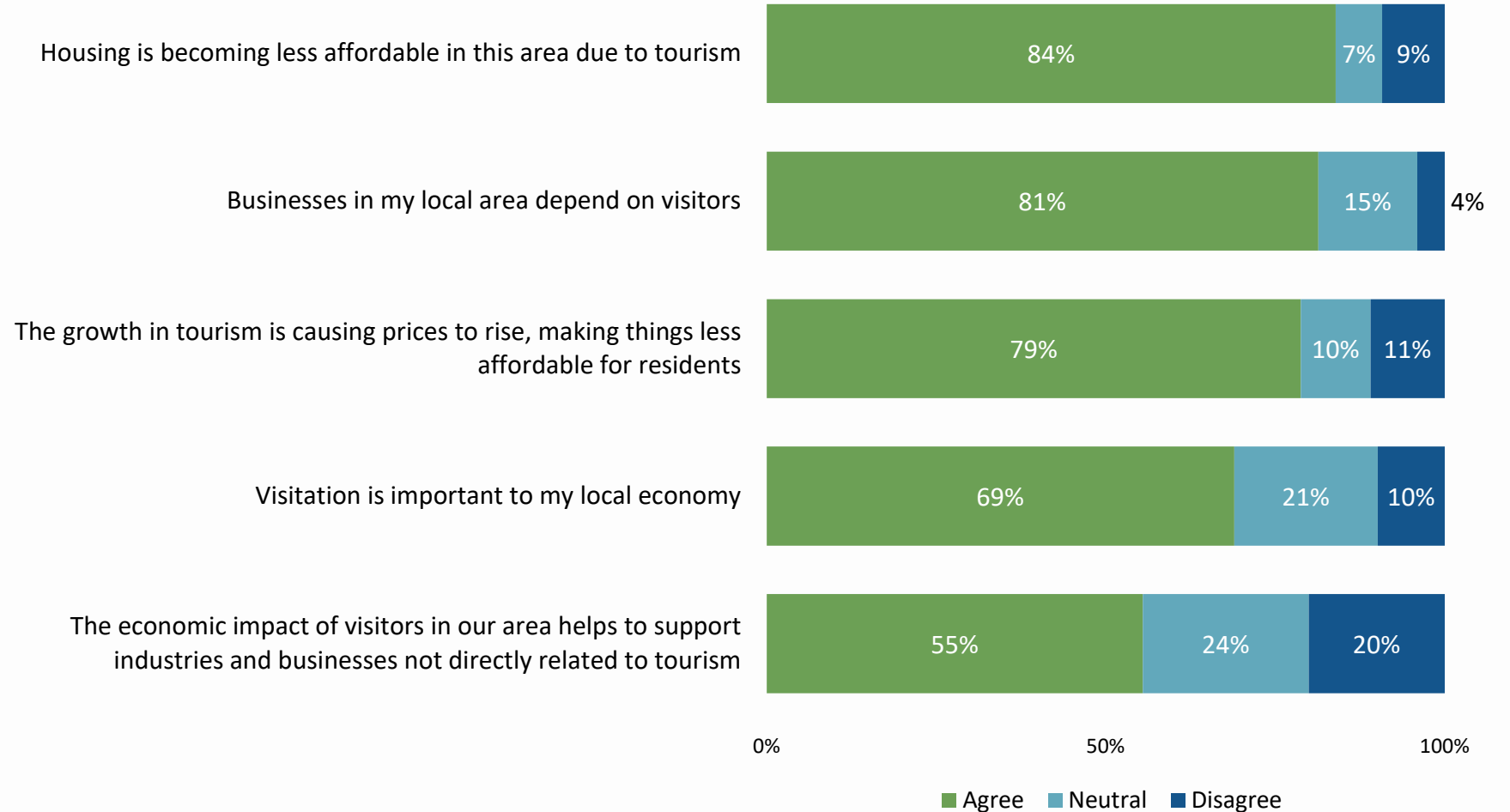
A vibrant street scene in San Francisco, likely Union Square, featuring colorful buildings, pedestrians, and the Transamerica Pyramid in the distance. The street is lined with trees and flower planters, and a red tulip-shaped light fixture is visible on the right. The sky is blue with scattered clouds.

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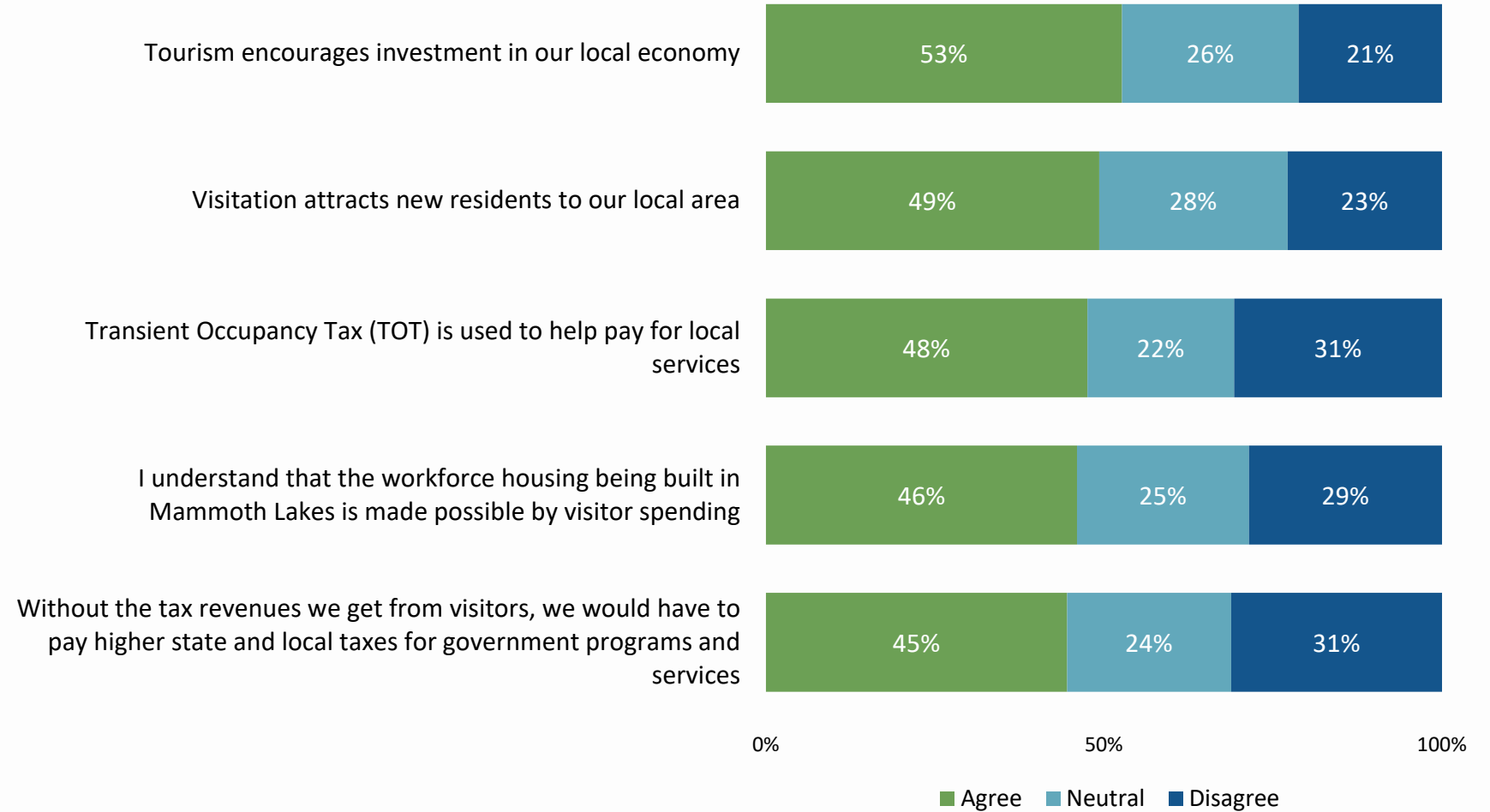
Economy

Economy

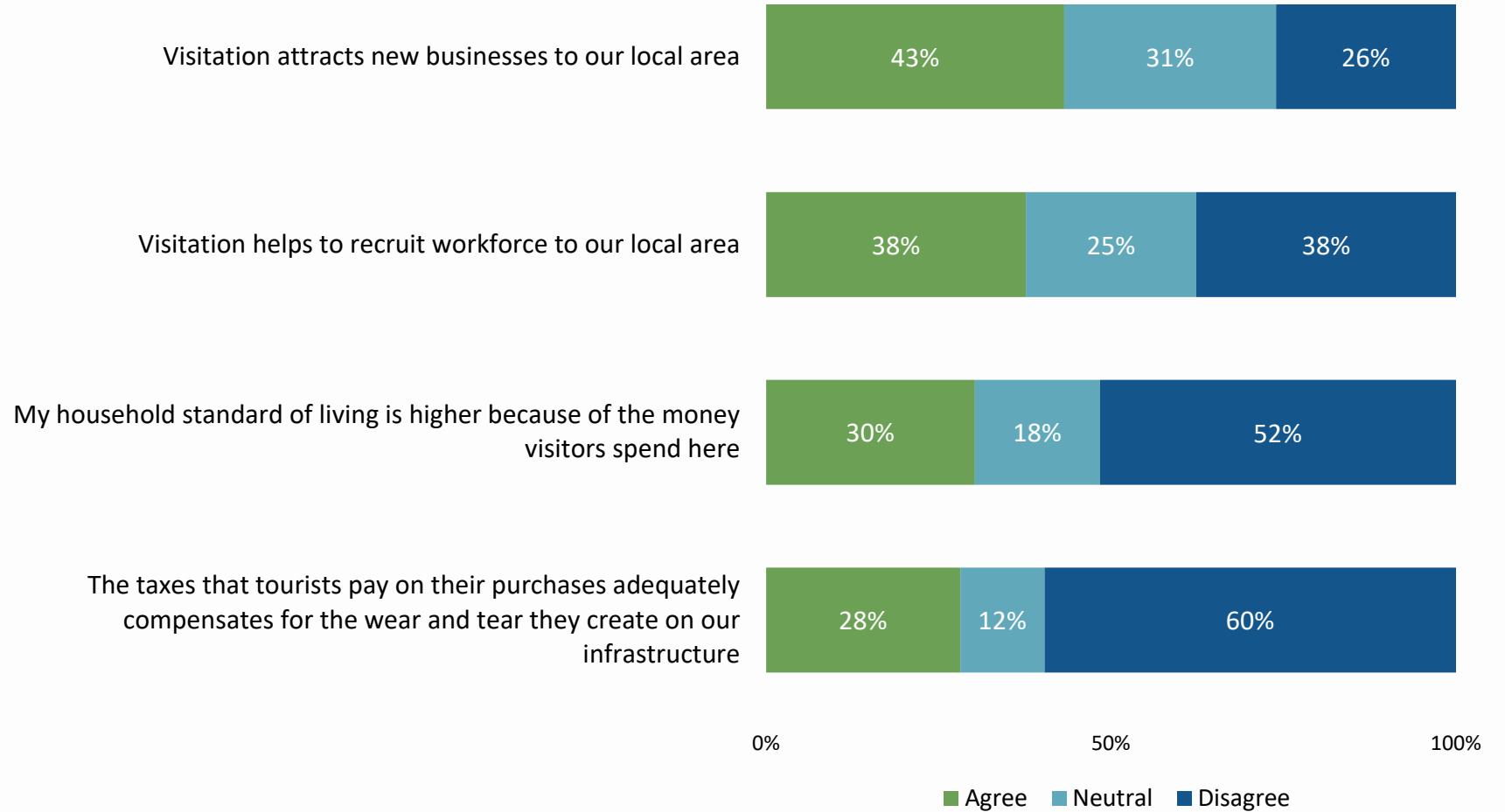
81% acknowledge businesses in the local area depend on visitors, and 69% view visitation as important to the local economy. However, housing and cost-of-living concerns dominate: 84% report housing becoming less affordable due to tourism, and 79% say the growth in tourism is causing prices to rise, making things less affordable for residents. Additionally, 55% agree the economic impact of visitors helps support industries and businesses not directly related to tourism. Only 28% believe taxes that tourists pay adequately compensate for infrastructure wear and tear, with 60% disagreeing.



Economy (Cont'd)



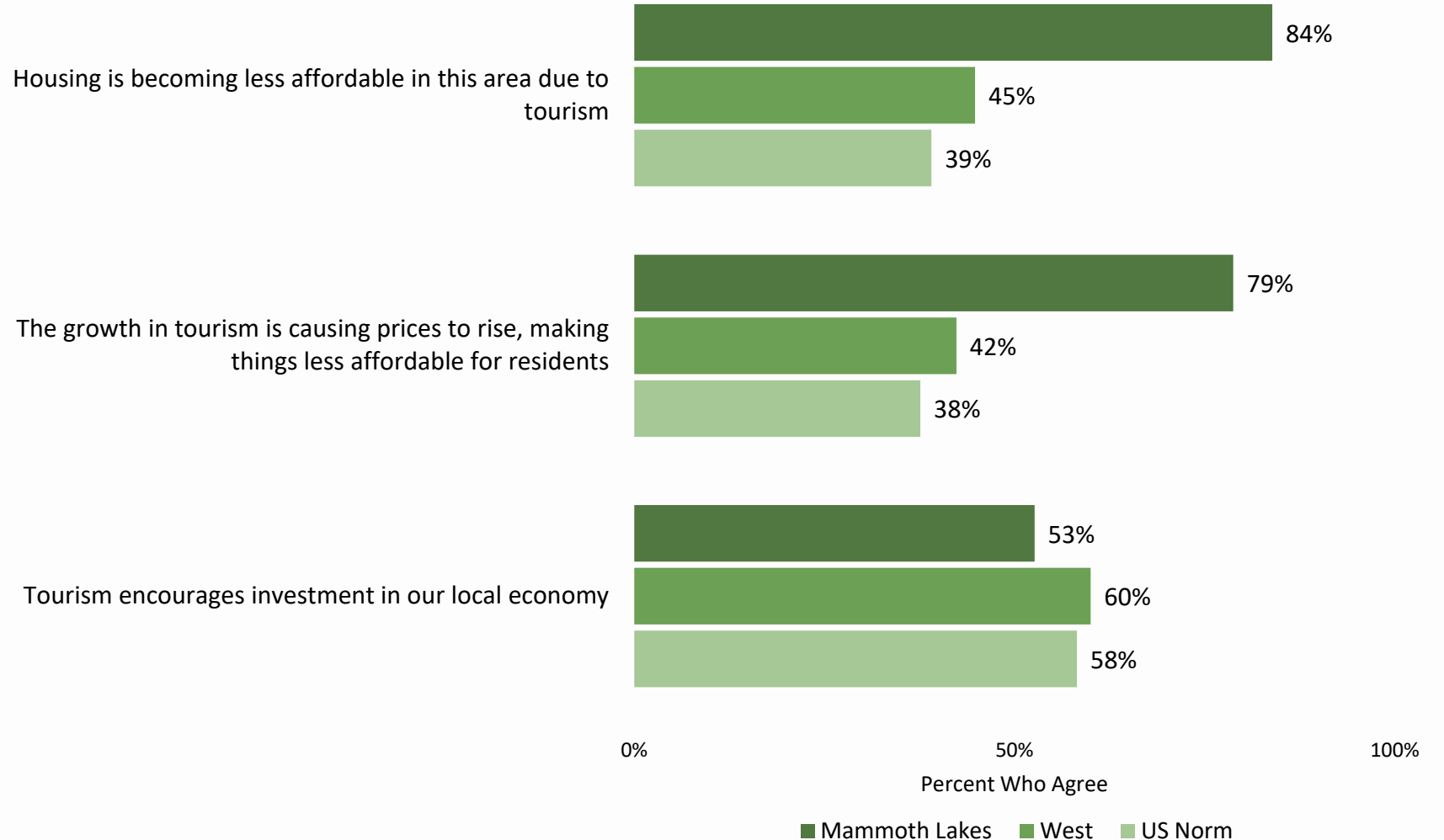
Economy (Cont'd)



Economy

Benchmarks

Mammoth Lakes residents are 39-45 points more likely than West and national peers to report housing becoming less affordable due to tourism (84% vs. 45% West, 39% US). Similarly, 79% believe the growth in tourism is causing prices to rise, making things less affordable for residents—37 points above West (42%) and 41 points above US norms (38%). While 53% recognize that tourism encourages investment in the local economy, this still trails benchmarks (60% West, 58% US) and is overshadowed by intense affordability concerns that far exceed regional and national norms.



A man in a dark suit, light blue shirt, and red tie is working at a computer in a hotel lobby. He is looking at the screen and has his hand on the keyboard. In the background, a woman in a dark suit is talking on a mobile phone. The lobby has a polished floor, a brass luggage cart, and large windows looking out onto a green area.

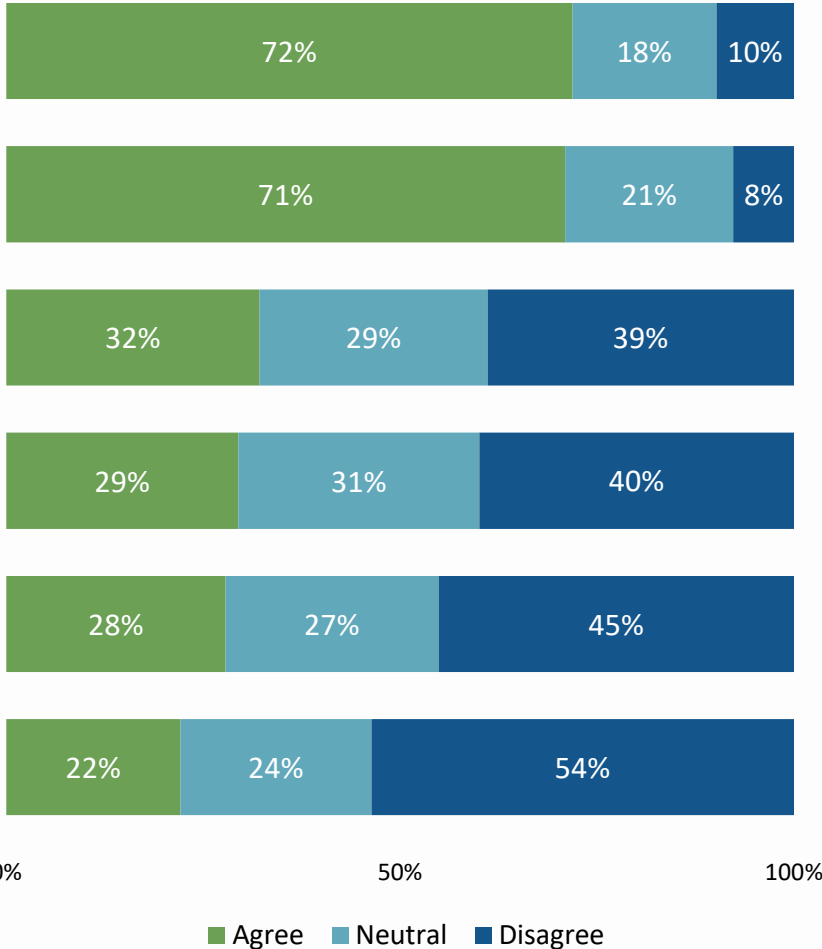
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Tourism Employment

Tourism Employment

Seven in ten (72%) view tourism jobs as low-paying and seasonal, while an equal 71% agree the industry offers many entry-level employment opportunities. However, belief in career advancement drops sharply: only 32% see career advancement opportunities, 29% view careers in the tourism industry as rewarding, and 28% believe desirable pay and benefits exist. Concerningly, only 22% would encourage friends and family to work in tourism, with 54% actively disagreeing. This stark divide between entry-level access and career quality perception highlights concerns about long-term employment prospects in the tourism sector.

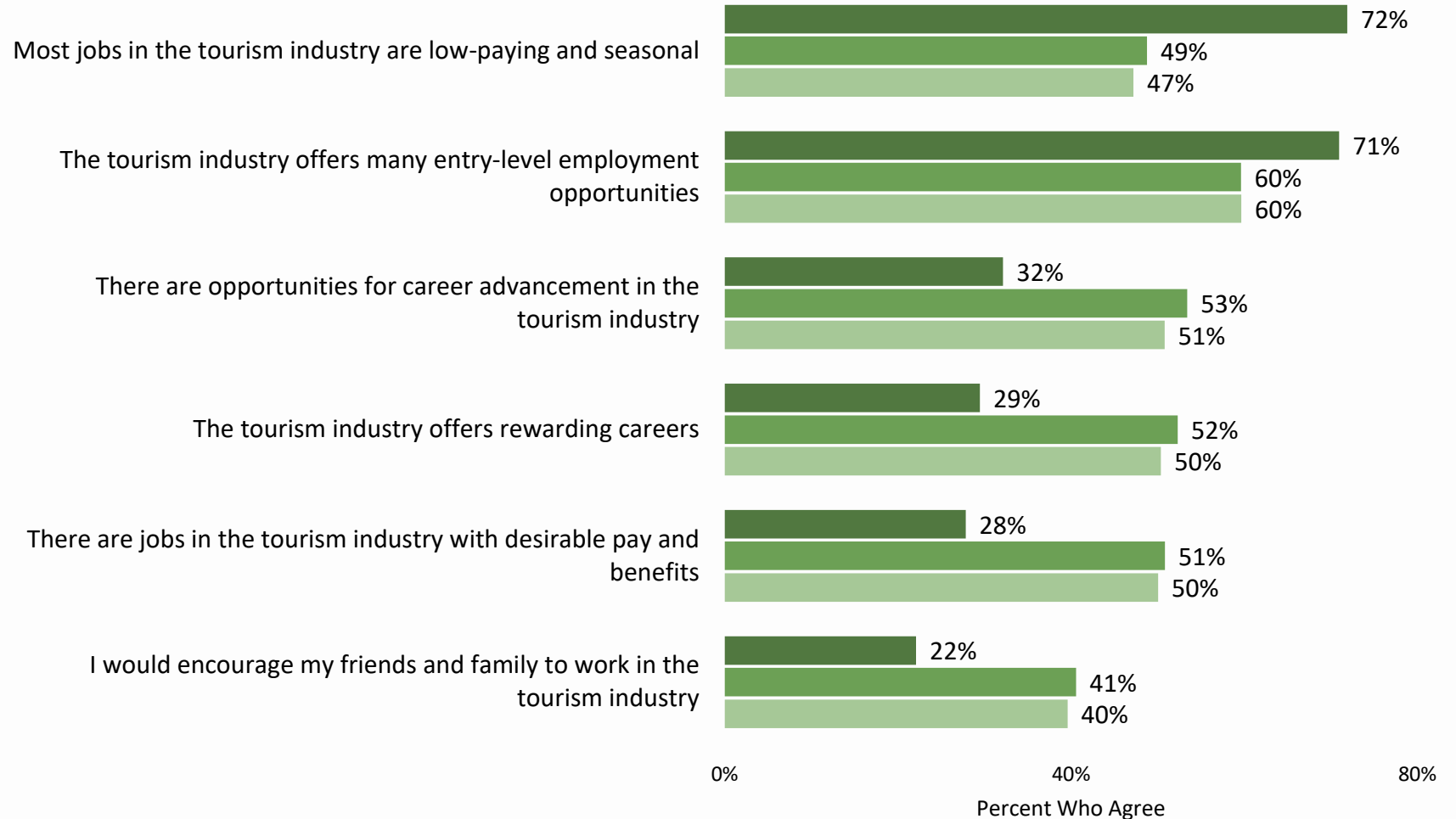
- Most jobs in the tourism industry are low-paying and seasonal
- The tourism industry offers many entry-level employment opportunities
- There are opportunities for career advancement in the tourism industry
- The tourism industry offers rewarding careers
- There are jobs in the tourism industry with desirable pay and benefits
- I would encourage my friends and family to work in the tourism industry



Tourism Employment

Benchmarks

Residents are 23-25 points more likely to view tourism jobs as low-paying and seasonal (72% vs. 49% West, 47% US). Most significantly, residents are 18-19 points less likely to encourage friends and family to work in tourism (22% vs. 41% West, 40% US), with 54% actively disagreeing. While entry-level opportunity perception is 11 points higher than benchmarks (71% vs. 60%), belief in career advancement lags 19-21 points below benchmarks (32% vs. 53% West, 51% US). Similarly, both perceptions of the industry providing rewarding careers and desirable pay/benefits trails 21-23 points behind regional and national norms benchmarks.



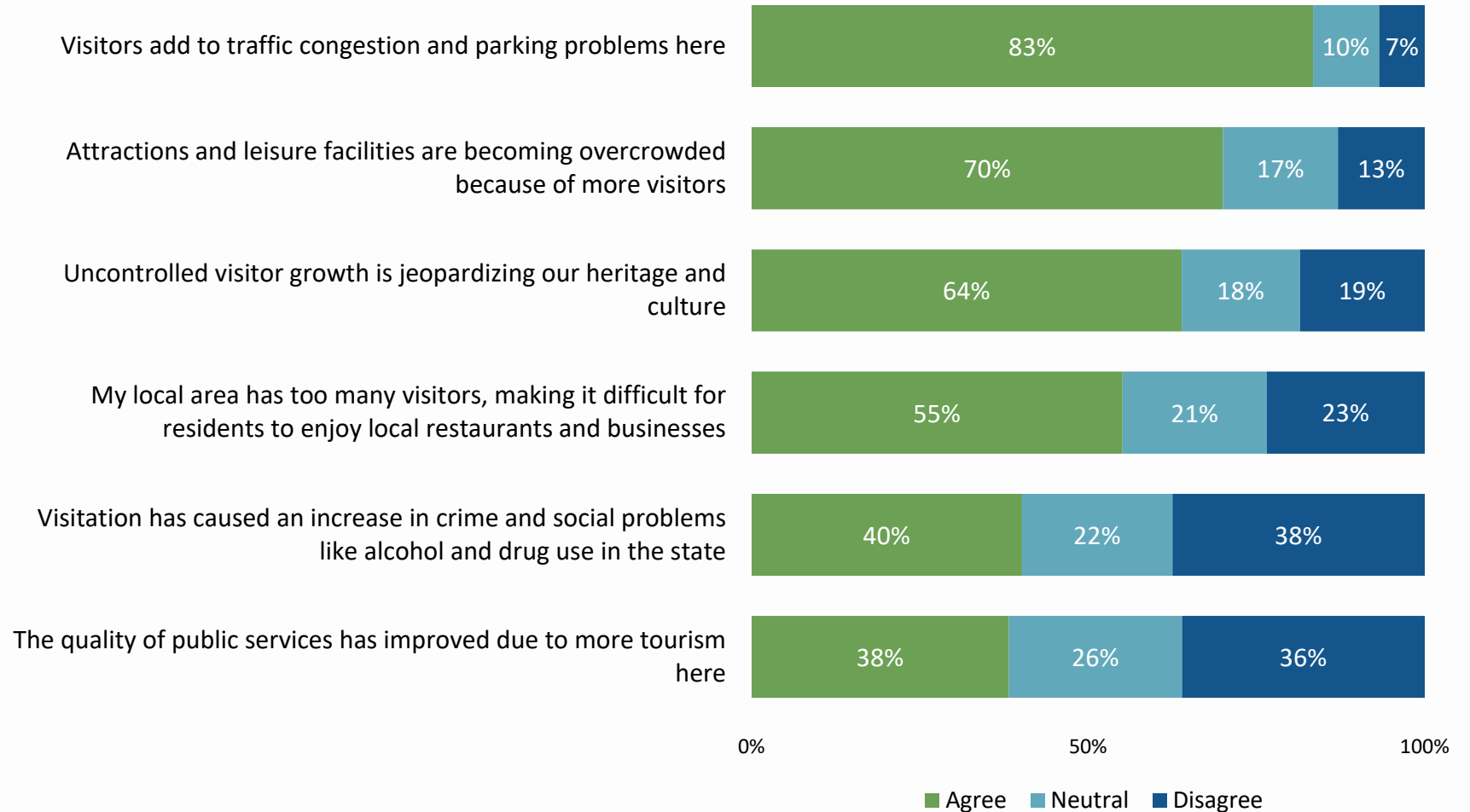


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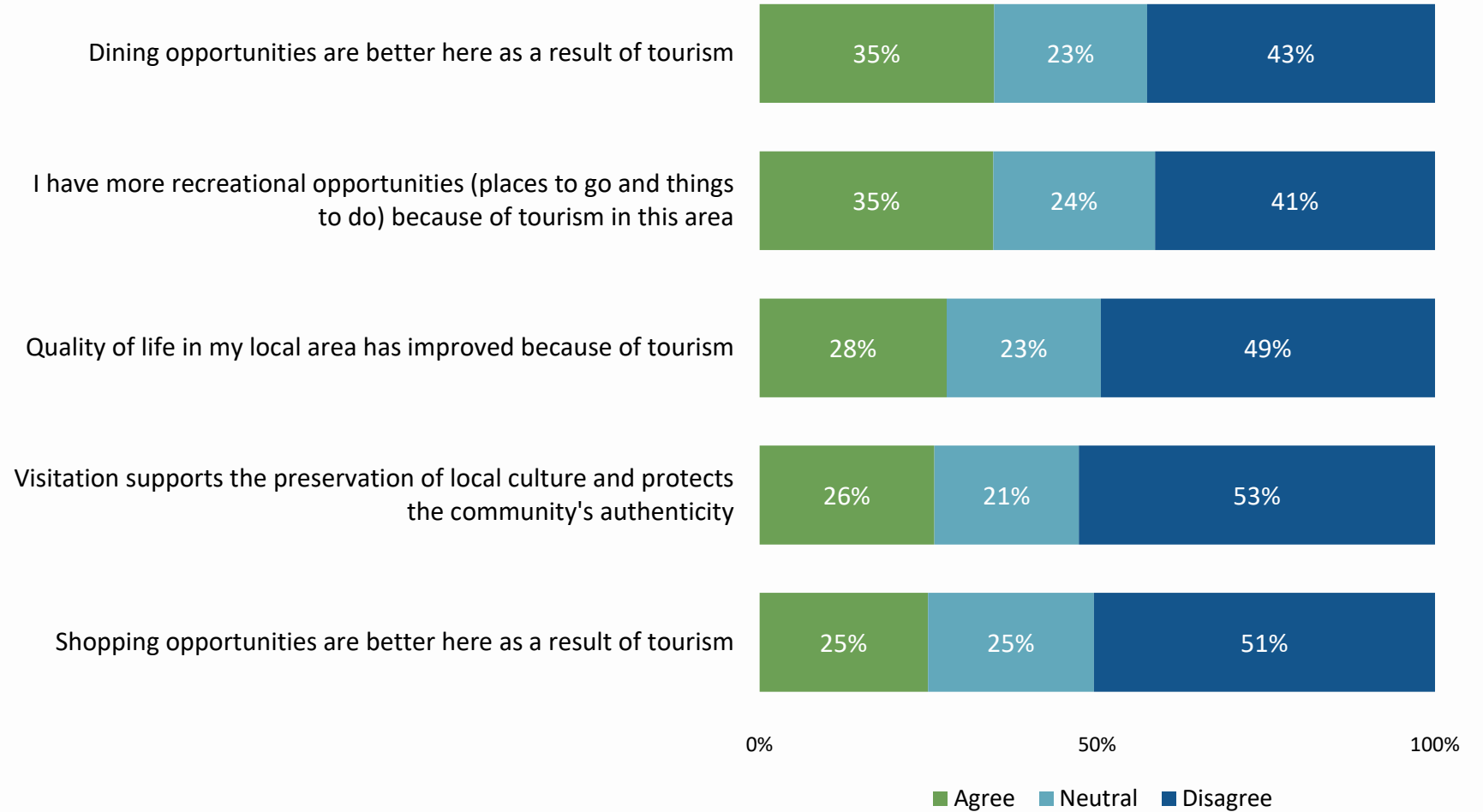
Quality of Life

Quality of Life

83% agree visitors add to traffic congestion and parking problems. Similarly, 70% say attractions and leisure facilities are becoming overcrowded because of more visitors, and 64% believe uncontrolled visitor growth is jeopardizing heritage and culture. Over half (55%) report too many visitors, making it difficult for residents to enjoy local restaurants and businesses. Additionally, 40% report visitation has caused an increase in crime and social problems like alcohol and drug use. On a positive note, 38% agree the quality of public services has improved due to more tourism here.



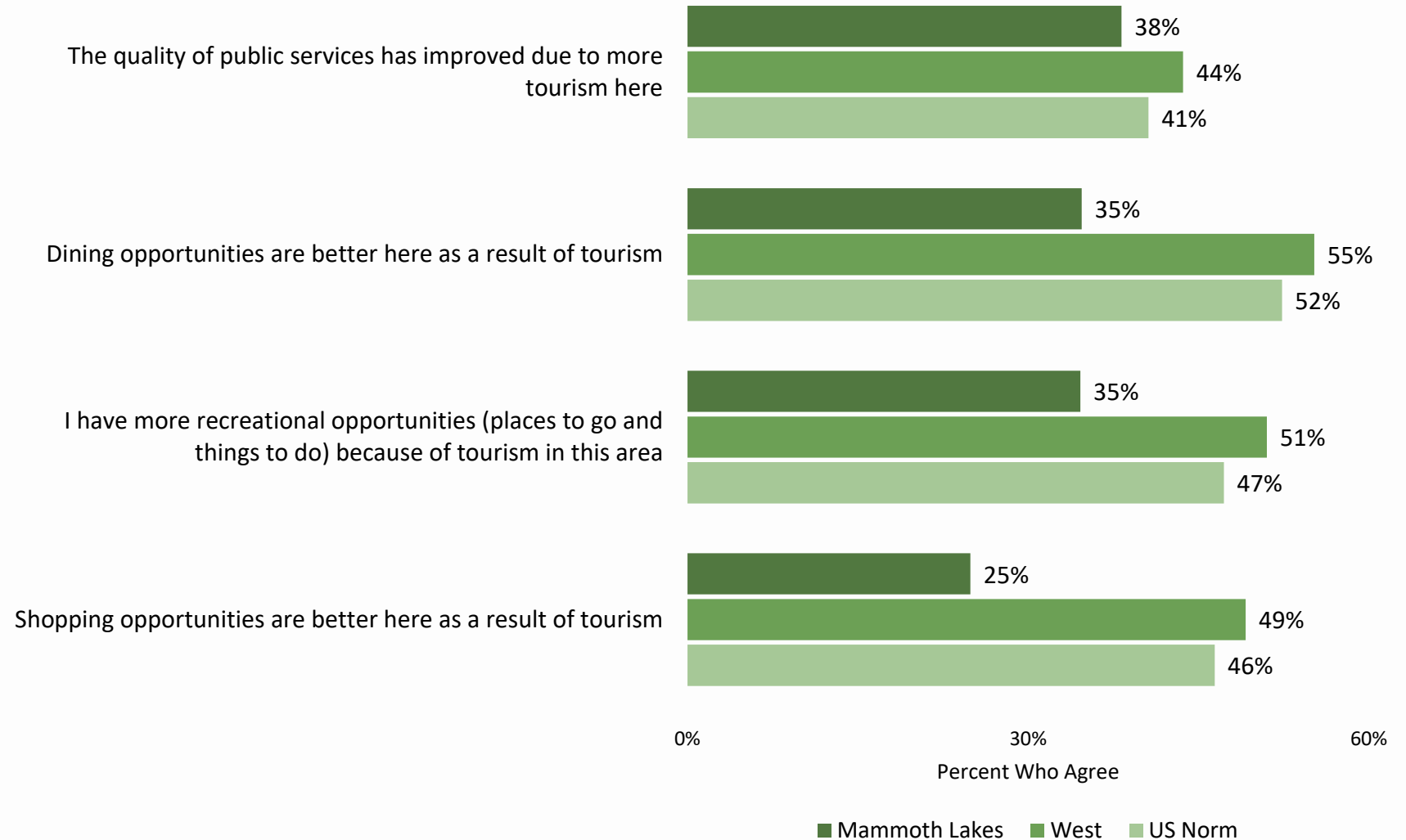
Quality of Life (Cont'd)



Quality of Life

Benchmarks

38% agree the quality of public services has improved due to more tourism, 3-6 points below West (44%) and US norms (41%). Similarly, 35% believe dining opportunities are better as a result of tourism, 20 points below West (55%) and 17 points below US benchmarks (52%). Additionally, 35% report more recreational opportunities because of tourism, 12-16 points below West (51%) and US norms (47%). Only 25% agree shopping opportunities are better as a result of tourism, 21-24 points below benchmarks (49% West, 46% US). These gaps suggest residents perceive fewer quality-of-life benefits from tourism compared to other destinations.



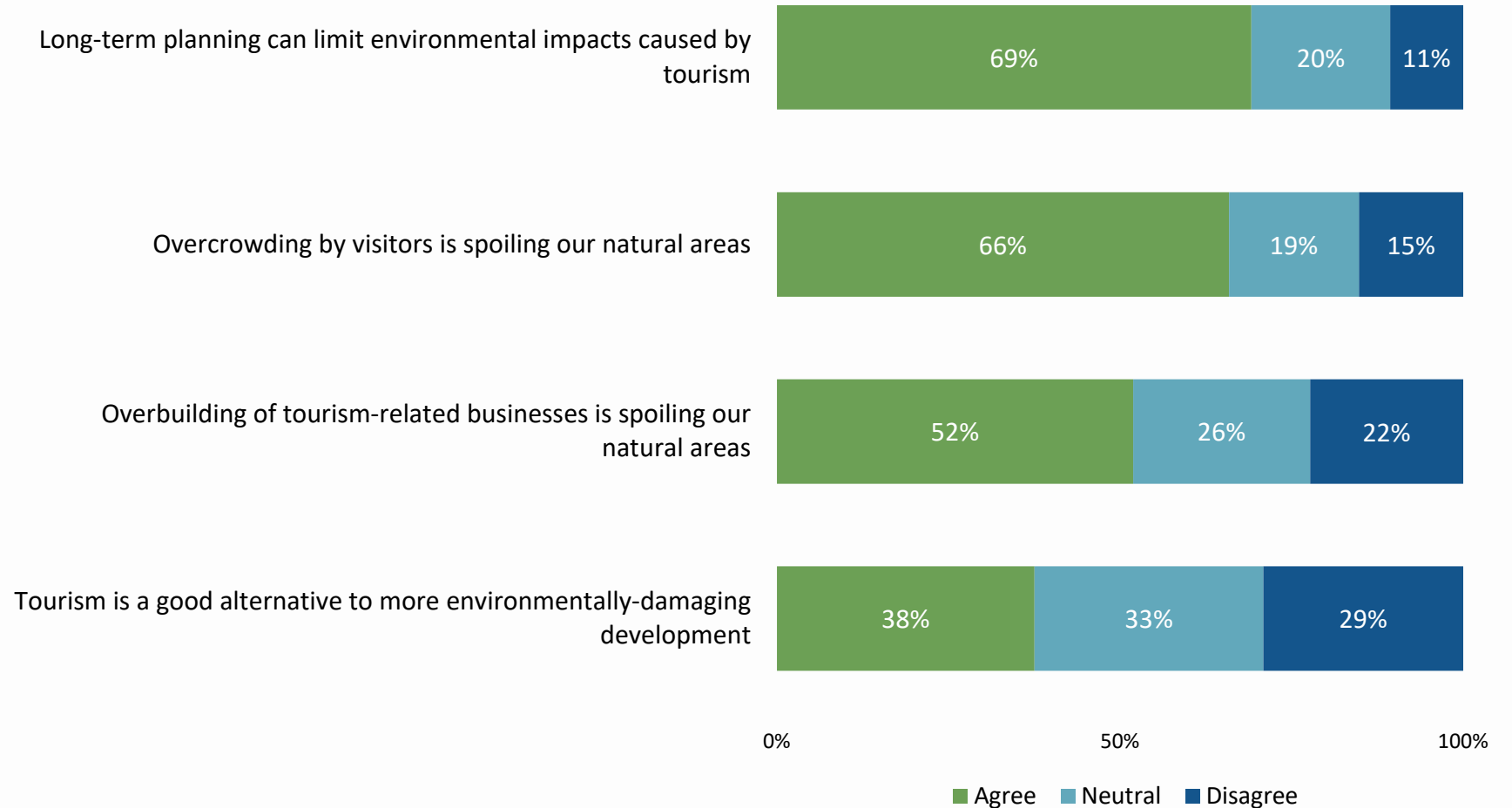


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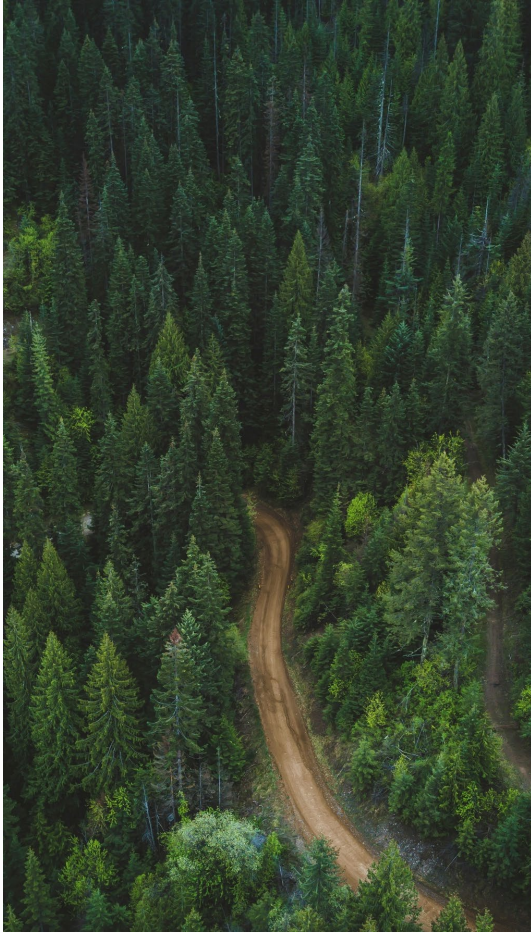
Environment

Environment

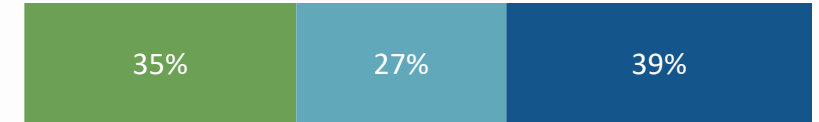
69% agree long-term planning can limit environmental impacts caused by tourism. However, 66% say overcrowding by visitors is spoiling natural areas, and 52% report overbuilding of tourism-related businesses is spoiling natural areas. Only 38% view tourism as a good alternative to more environmentally-damaging development. These findings reveal tension between recognition that planning can mitigate impacts and widespread concern that current visitor volumes and development patterns are already degrading natural areas.



Environment (Cont'd)



Tourism can help the environment as local governments and people seek to protect sensitive and scenic areas



The tourism industry values sustainability and our natural resources



Visitors are educated on how to travel responsibly and care for our natural areas



Visitors are respectful of our natural areas



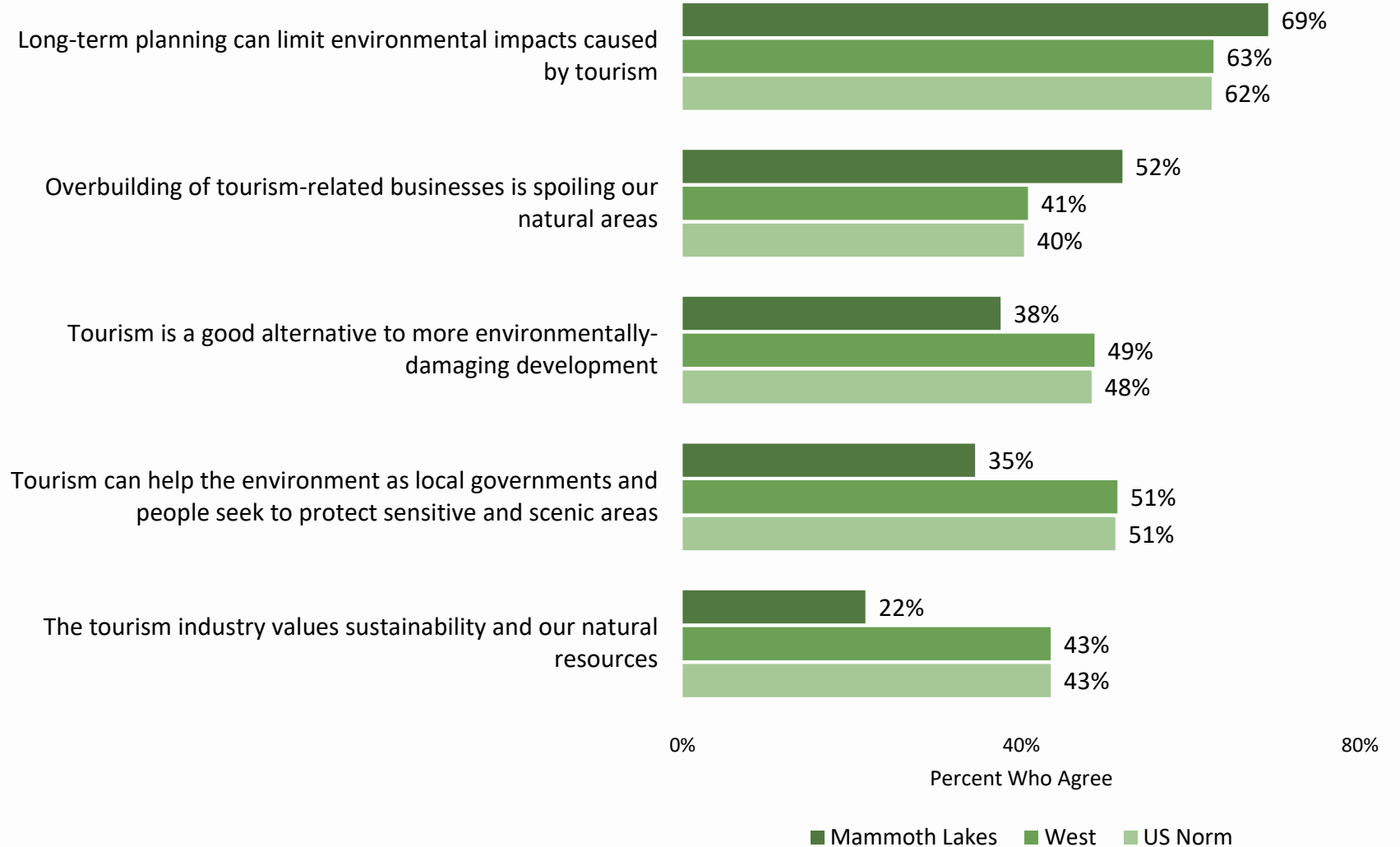
0% 50% 100%

Agree Neutral Disagree

Environment

Benchmarks

While 69% agree long-term planning can limit environmental impacts caused by tourism, 6-7 points above West (63%) and US norms (62%), concerns about current damage are elevated. 52% report overbuilding of tourism-related businesses is spoiling natural areas, 11-12 points above benchmarks (41% West, 40% US). Only 35% believe tourism can help the environment as governments and people seek to protect sensitive areas, 16 points below both West and US norms (51%). Most critically, just 22% believe the tourism industry values sustainability and natural resources, 21 points below benchmarks (43% West and US), with 58% disagreeing. These gaps reveal significant skepticism about industry commitment to environmental stewardship.



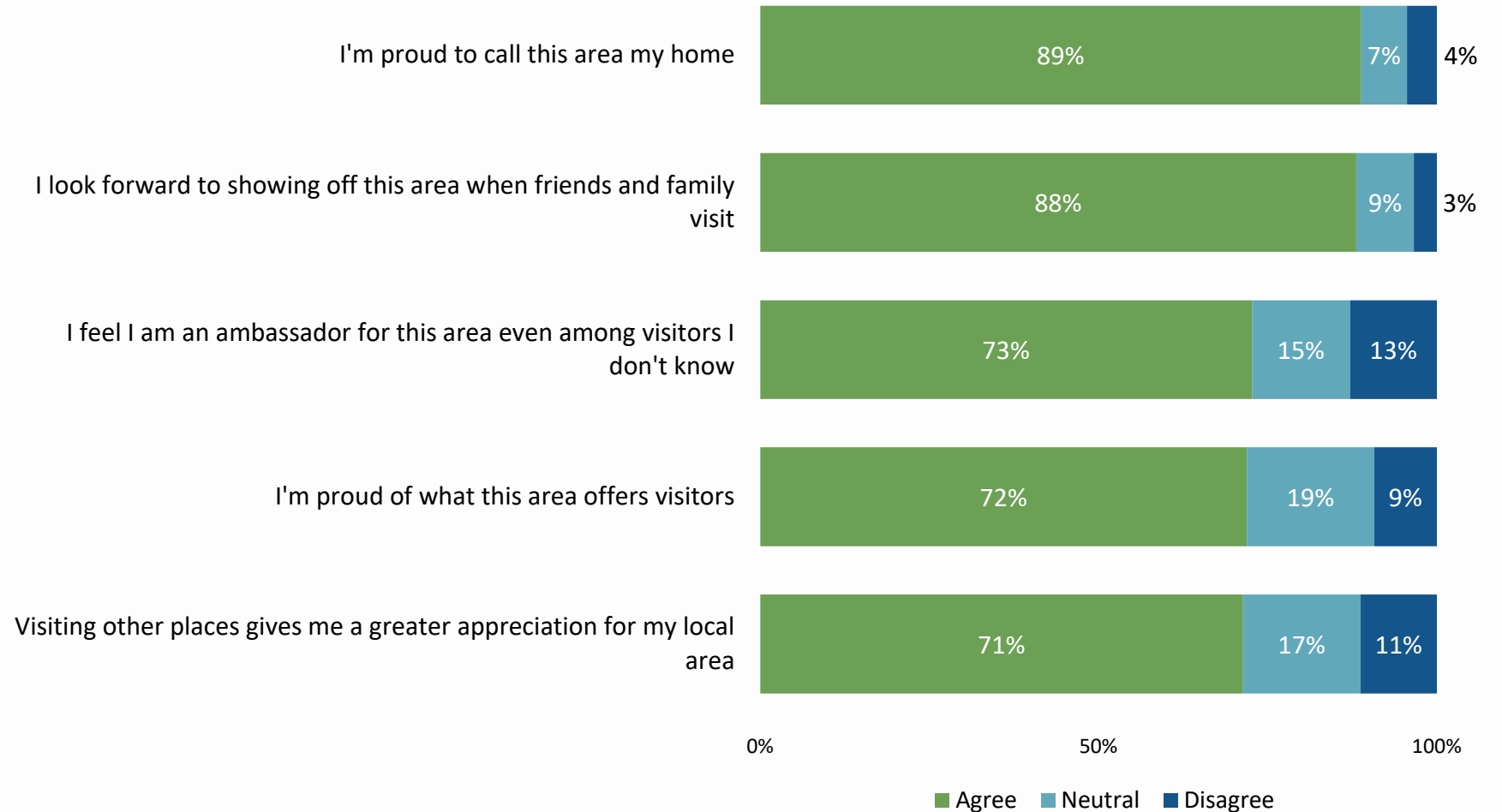


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Involvement/Engagement with Tourism

Involvement/Engagement with Tourism

89% are proud to call the area home, while 88% look forward to showing it off to visiting friends and family. Nearly three-quarters (73%) feel they are ambassadors for the area even among visitors they don't know, and 72% are proud of what the area offers visitors. Additionally, 71% report visiting other places gives them a greater appreciation for their local area. These high engagement levels demonstrate strong resident pride and willingness to promote the destination, even amid concerns about tourism impacts expressed throughout the study.



Involvement/Engagement with Tourism (Cont'd)



When I come across local tourism news, I'm interested in finding out what's happening



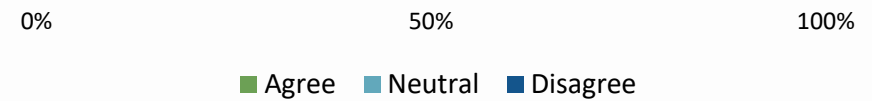
I consider myself informed/up-to-date on news about tourism in this area



I recommend local tourist sites to people who are visiting my area



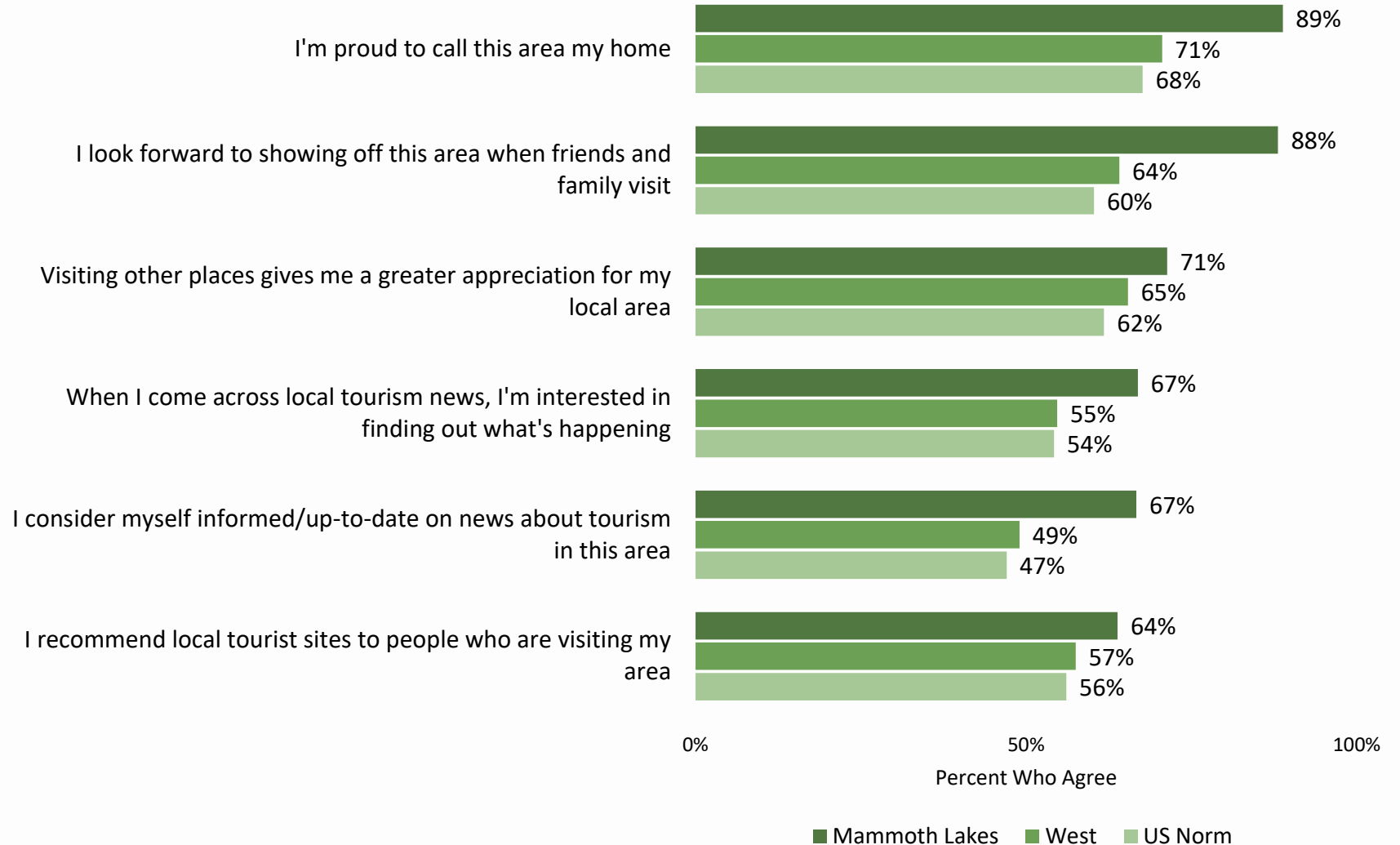
I welcome visitors to this area



Involvement/Engagement with Tourism

Benchmarks

Resident engagement significantly outperforms regional and national benchmarks across multiple dimensions. 89% are proud to call the area home, 18 points above West (71%) and 21 points above US norms (68%). Similarly, 88% look forward to showing off the area, 24 points above West (64%) and 28 points above US (60%). Notably, 67% are interested in finding out what's happening when they encounter local tourism news, 12 points above West (55%) and 13 points above US norm (54%). Additionally, 67% consider themselves informed and up-to-date on tourism news, dramatically outpacing West (49%) by 18 points and US (47%) by 20 points. This elevated engagement is noteworthy given residents' concerns about tourism impacts expressed throughout the study.



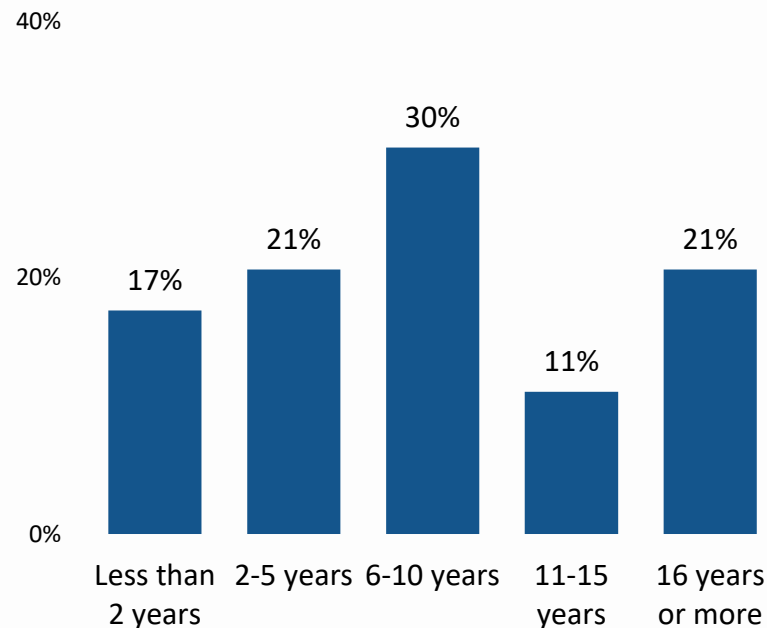


Business Owners

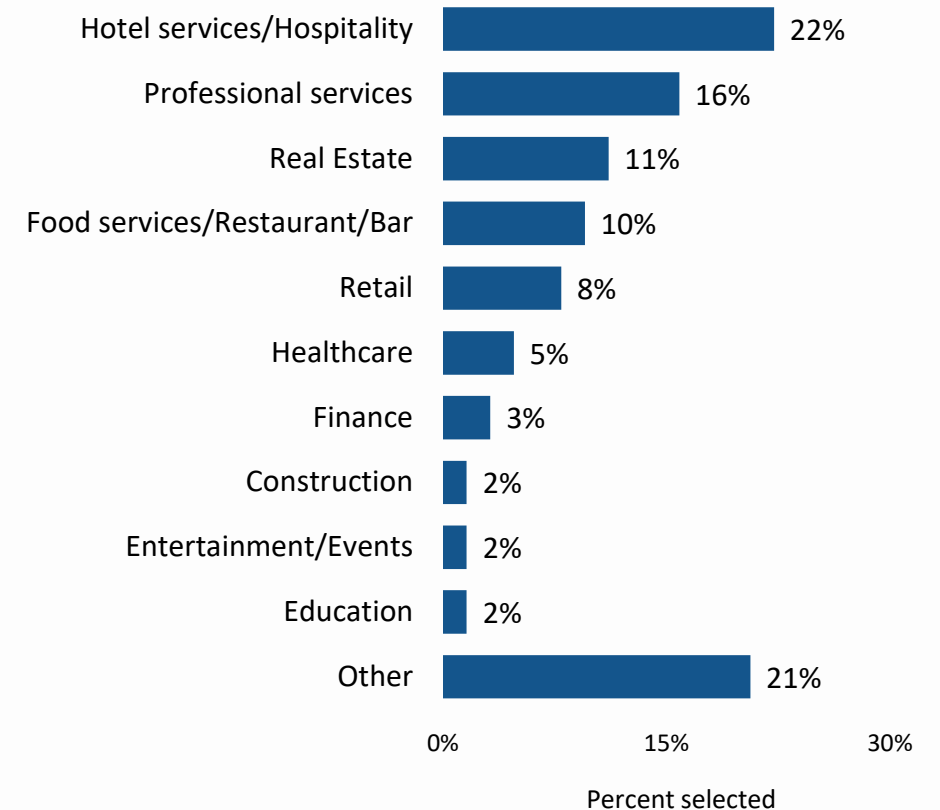
Business Owners

Business owners surveyed have been operating for significant periods, with 21% in business for 16 years or more, and 11% for 11-15 years. The business community is diverse, with the largest representation from Hotel services/Hospitality (22%), followed by Professional services (16%), Real Estate (11%), and Food services/Restaurant/Bar (10%). Additional sectors include Retail (8%), Healthcare (5%), Finance (3%), Construction (2%), Entertainment/Events (2%), and Education (2%), with 21% categorized as Other.

Years in Business

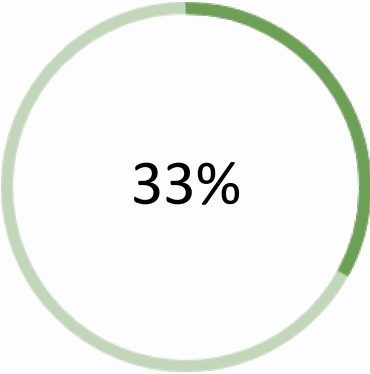


Type of Business



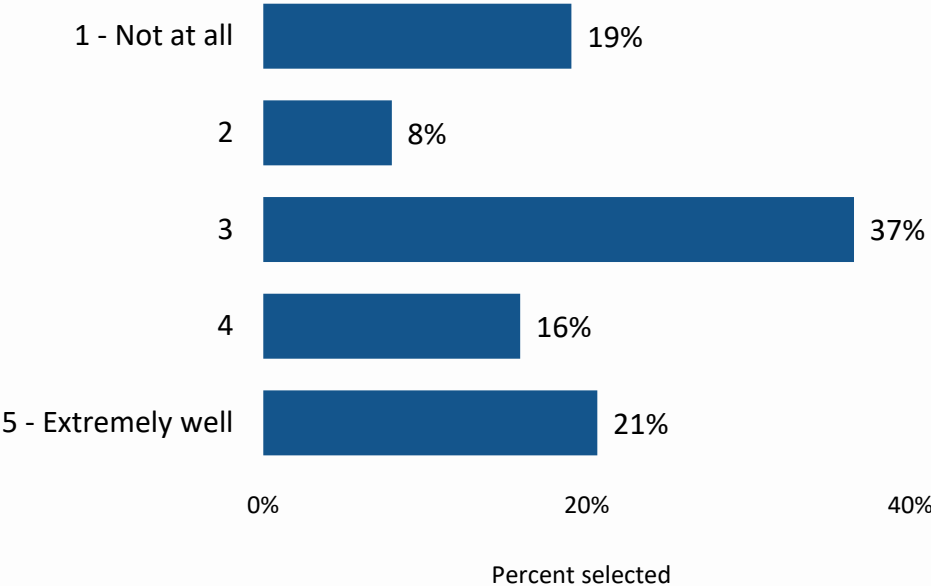
Tourism Business Improvement District (TBID)

Only 33% of business owners feel their TBID assessment provides a positive impact on them, their business, and the community. Understanding of how TBID assessed dollars are used varies considerably: while 21% report having an extremely high level of understanding, 37% rate their understanding at a moderate level, and 27% indicate minimal understanding. This distribution suggests significant opportunity to improve communication about TBID allocation and benefits to the business community.



33% of business owners feel their TBID assessment provides a positive impact on them, their business, and the community

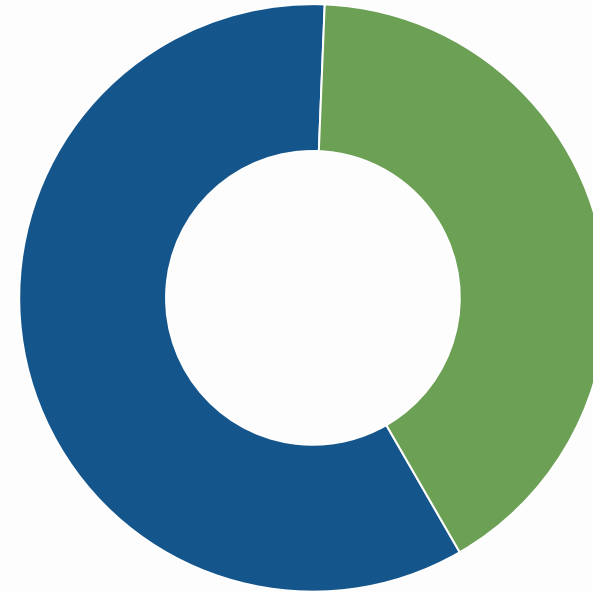
Level of Understanding of How TBID Assessed Dollars are Used



Tourism Business Improvement District (TBID)

When asked to describe or give an example of how TBID-funded destination marketing has benefited their business, responses split notably: 59% provided no benefits or negative comments, while 41% cited positive impacts. This nearly 60/40 divide indicates substantial skepticism among business owners, especially those who don't perceive themselves as being tourism-related business, about the value of TBID-funded marketing, aligning with the earlier finding that only 33% feel their assessment provides positive impact.

No Benefits or Negative
Comments: 59%



Positive Impacts:
41%

The TBID tax needs to be reduced. It negatively impacts local businesses. Overall, tourists are over-taxed in Mammoth.

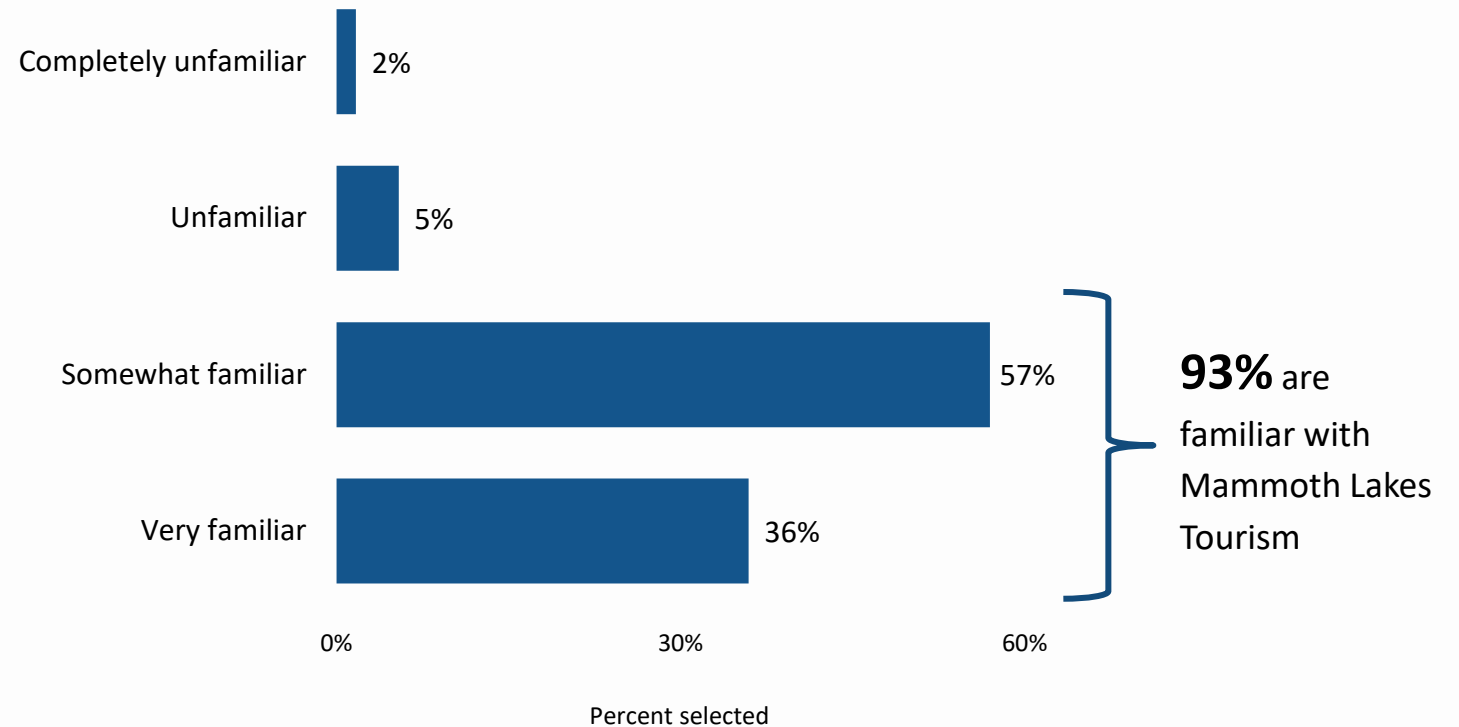
We depend upon visitors from outside our area to survive and prosper.



Mammoth Lakes Tourism

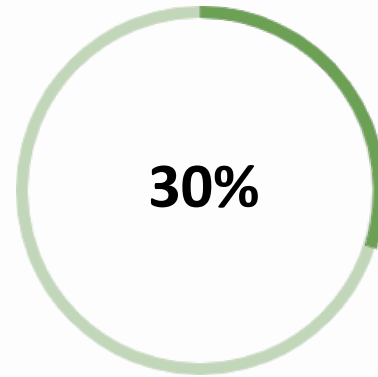
Familiarity with Mammoth Lakes Tourism

An overwhelming 93% of residents are familiar with Mammoth Lakes Tourism, with 36% reporting they are very familiar and 57% somewhat familiar. Only 7% are unfamiliar (5% or completely unfamiliar (2%). This exceptionally high familiarity rate demonstrates strong organizational visibility and name recognition throughout the community, providing a solid foundation for communication and engagement efforts.



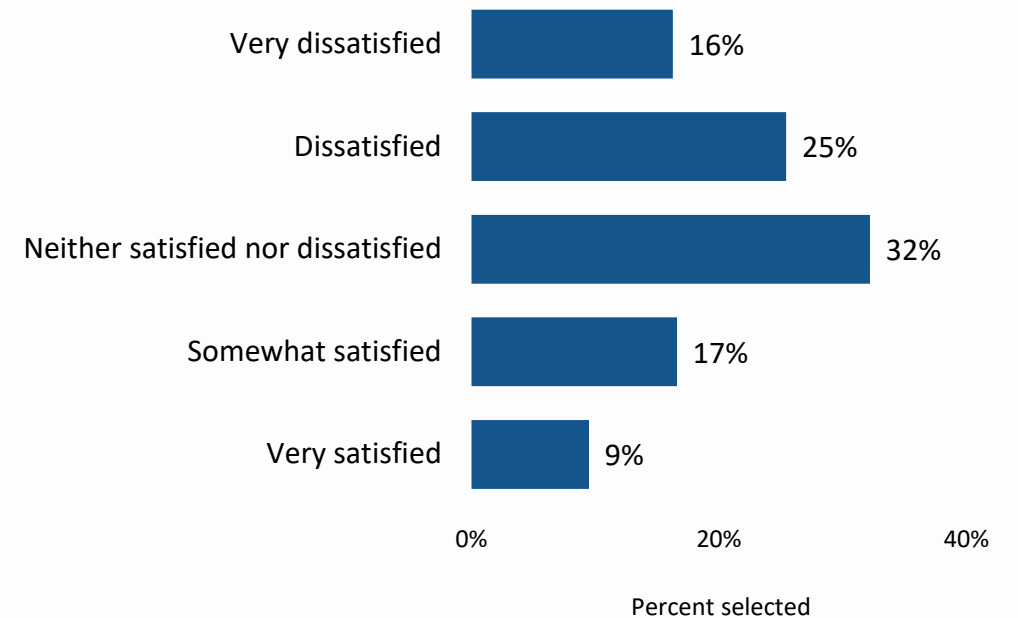
Destination Management

Only 30% feel the voices and ideas of residents are heard and taken into account when it comes to the management of tourism in Mammoth Lakes. Satisfaction with Mammoth Lakes Tourism's efforts to balance the needs of residents with visitors is similarly low: just 26% are satisfied (9% very satisfied, 17% somewhat satisfied), while 41% are dissatisfied (16% very dissatisfied, 25% dissatisfied), and 32% are neither satisfied nor dissatisfied. These findings reveal a significant disconnect between resident familiarity with the organization and their perception of meaningful input into tourism management decisions.



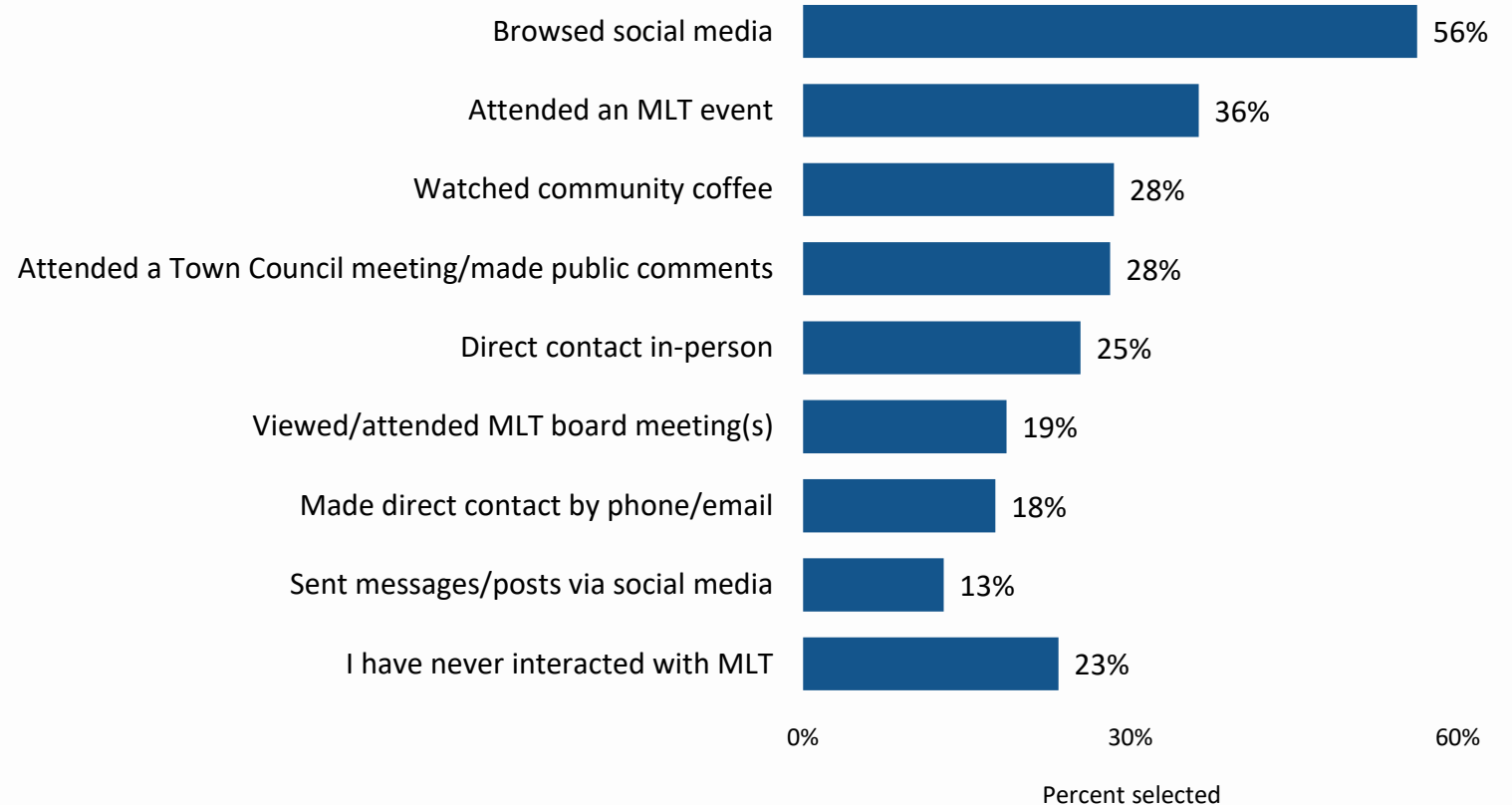
feel the voices and ideas of residents are heard and taken into account when it comes to the management of tourism in Mammoth Lakes

Satisfaction with Mammoth Lakes Tourism's Efforts to Balance the Needs of Residents with Visitors



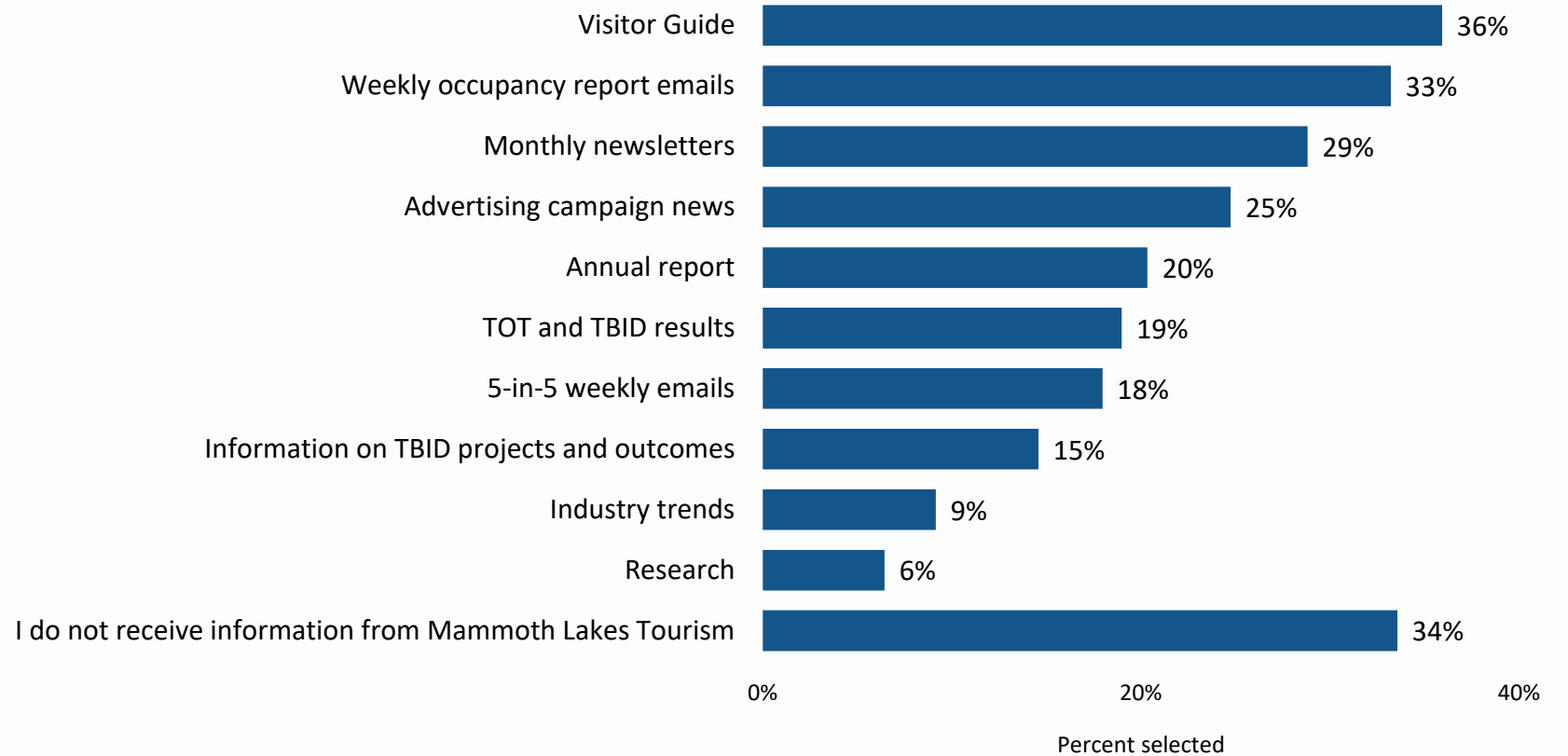
Interactions with Mammoth Lakes Tourism

Residents engage with Mammoth Lakes Tourism through diverse channels, most commonly by browsing social media (56%). Other interactions include attending MLT events (36%), watching community coffee sessions (28%), and attending Town Council meetings or making public comments (28%). Direct engagement methods include in-person contact (25%), viewing or attending MLT board meetings (19%), direct phone/email contact (18%), and sending social media messages or posts (13%). Notably, 23% report they have never interacted with MLT, despite the 93% familiarity rate, suggesting opportunities to convert awareness into active engagement.



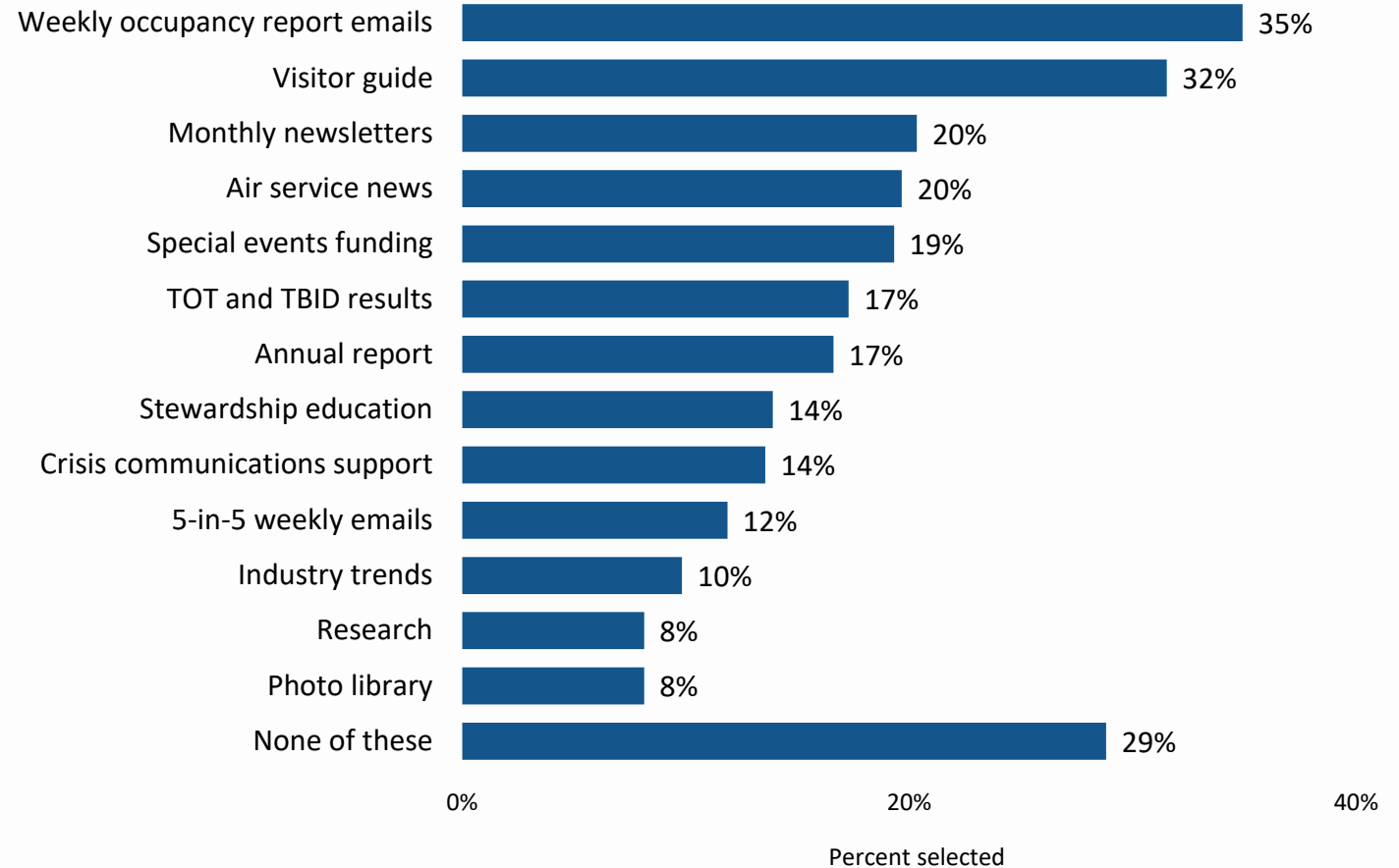
Information Received from Mammoth Lakes Tourism

The Visitor Guide is the most commonly received information from Mammoth Lakes Tourism (36%), followed by weekly occupancy report emails (33%), monthly newsletters (29%), and advertising campaign news (25%). Other communications include the annual report (20%), TOT and TBID results (19%), 5-in-5 weekly emails (18%), information on TBID projects and outcomes (15%), industry trends (9%), and research (6%). Notably, 34% report they do not receive information from Mammoth Lakes Tourism, representing a substantial segment unreachable by current communication channels.



Most Useful Resources from Mammoth Lakes Tourism

Among those who receive information, weekly occupancy report emails are rated most useful (35%), followed by the Visitor Guide (32%), monthly newsletters (20%), and air service news (20%). Other valued resources include special events funding (19%), TOT and TBID results (17%), annual report (17%), stewardship education (14%), crisis communications support (14%), 5-in-5 weekly emails (12%), industry trends (10%), research (8%), and photo library (8%). However, 29% indicate none of these resources are useful to them, suggesting either limited relevance to their needs or opportunities to better communicate value and utility of existing resources.

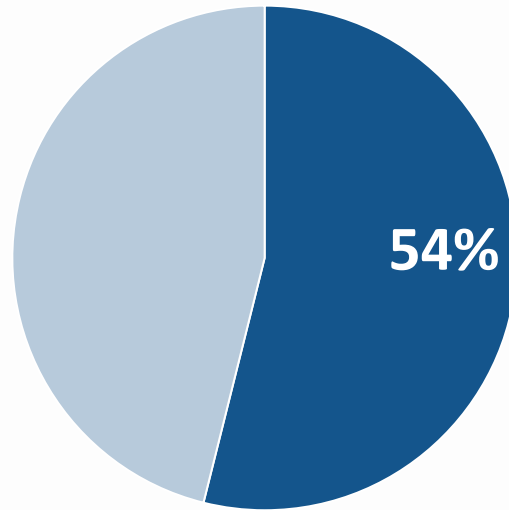




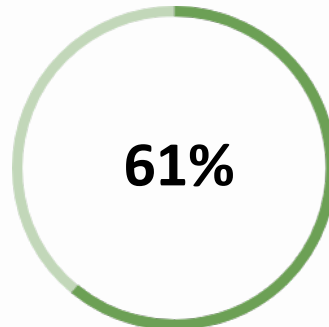
Real Unreal Campaign

Real Unreal Campaign

Over half (54%) of residents have seen messaging or advertising about the Real Unreal campaign. Among those aware of the campaign, social media is by far the most common source (83%), followed by newspaper (47%), street banners (38%), and bus shelters (35%), with 13% citing other sources. Importantly, 61% of those aware think the Real Unreal campaign accurately represents the message that Mammoth Lakes wants to send to visitors. This positive reception suggests the campaign resonates with residents' vision for how the destination should be presented, despite broader concerns about tourism management expressed elsewhere in the study.



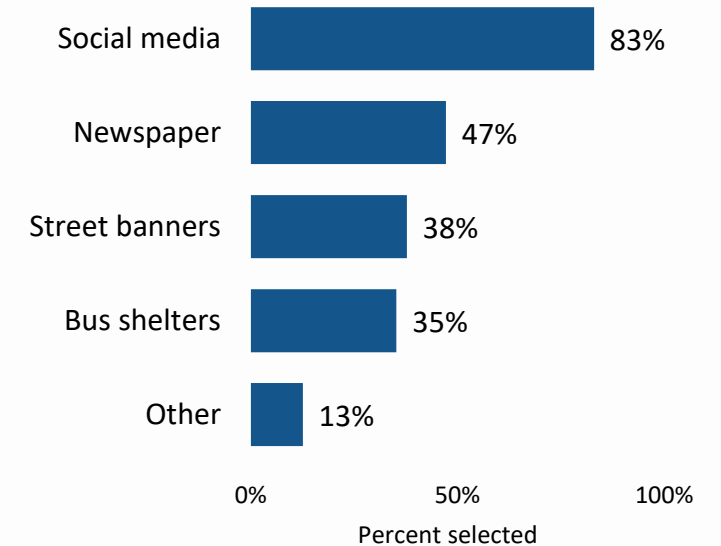
have seen messaging or advertising about the Real Unreal campaign



think the Real Unreal campaign accurately represents the message that Mammoth Lakes wants to send to visitors

Base: Respondents aware of the Real Unreal campaign

Sources for Real Unreal Campaign Messaging/Advertising



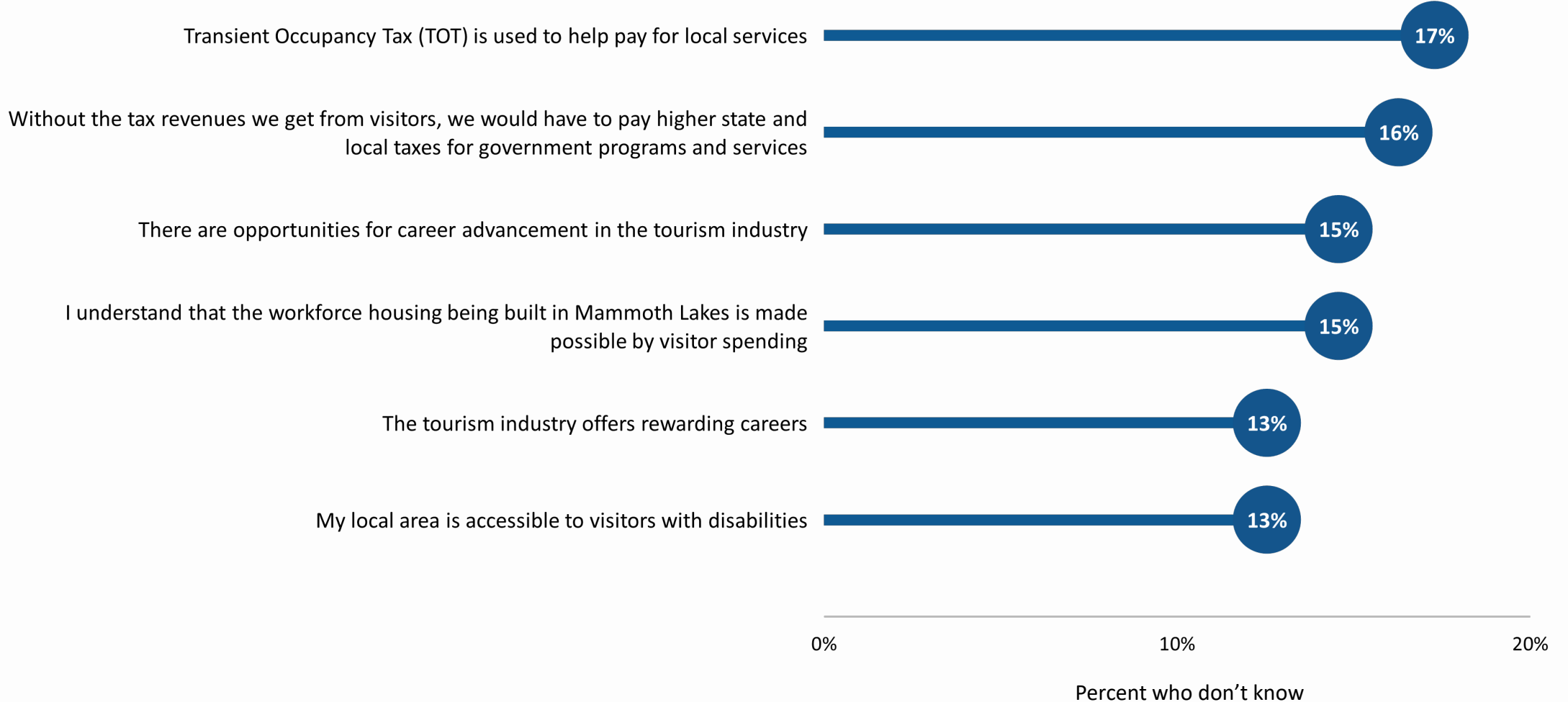
Base: Respondents aware of the Real Unreal campaign



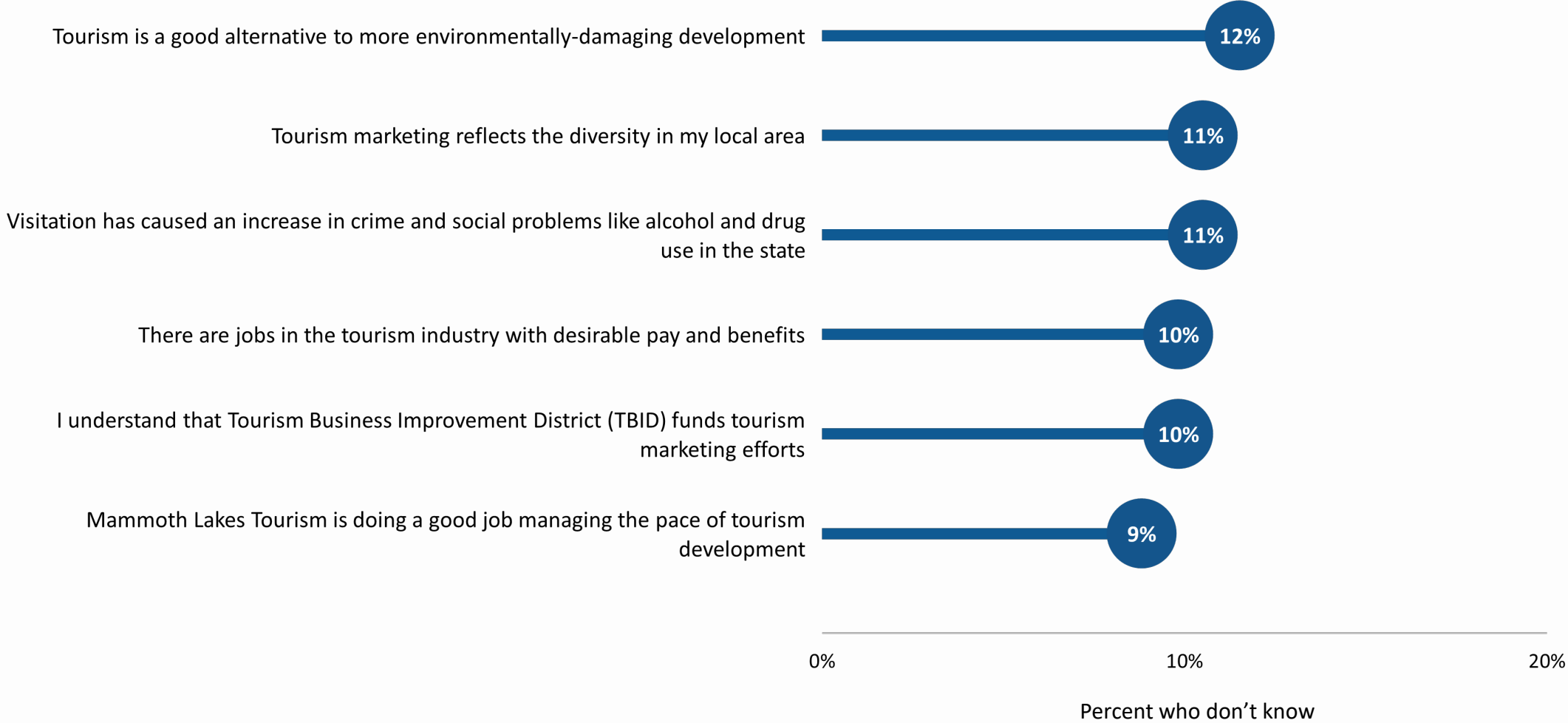
What Residents Don't Know



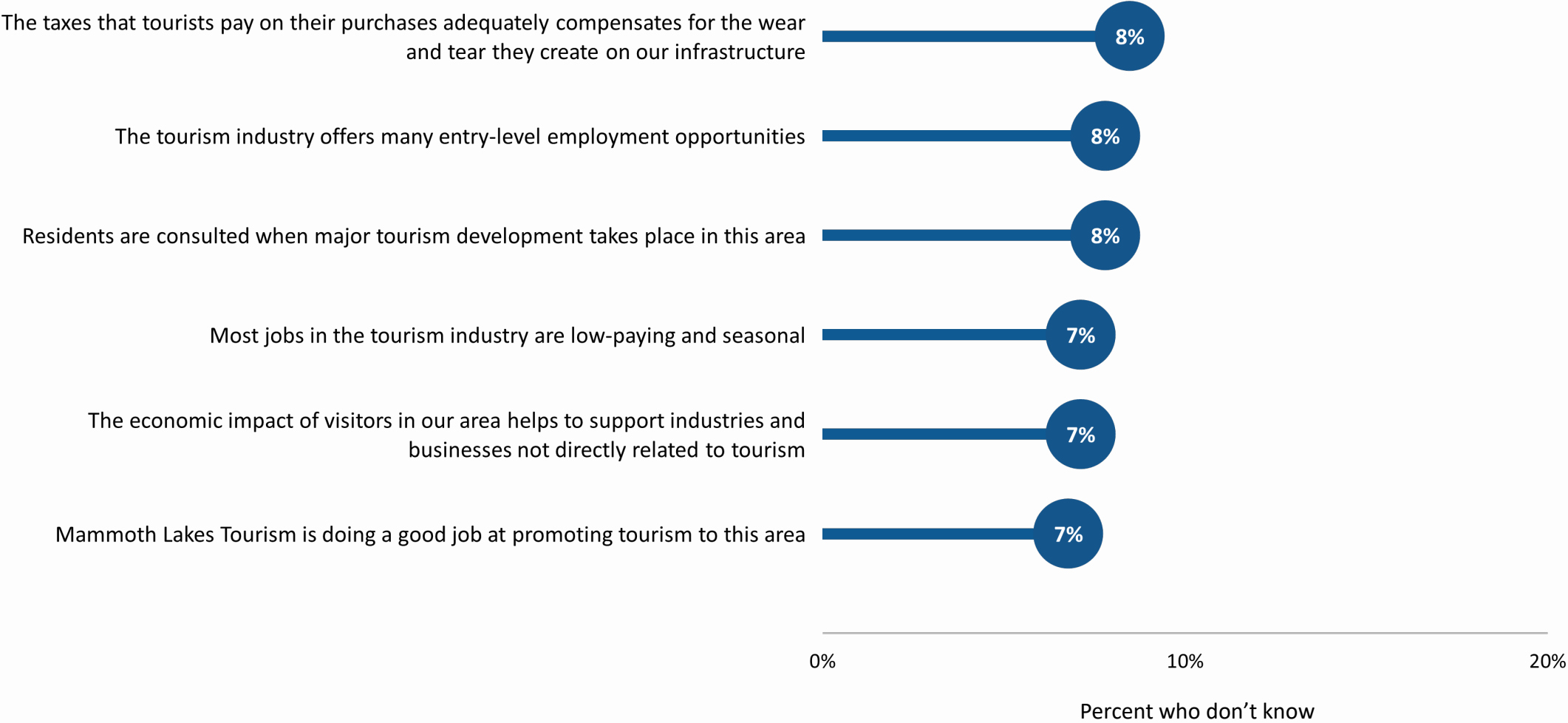
What Residents Don't Know



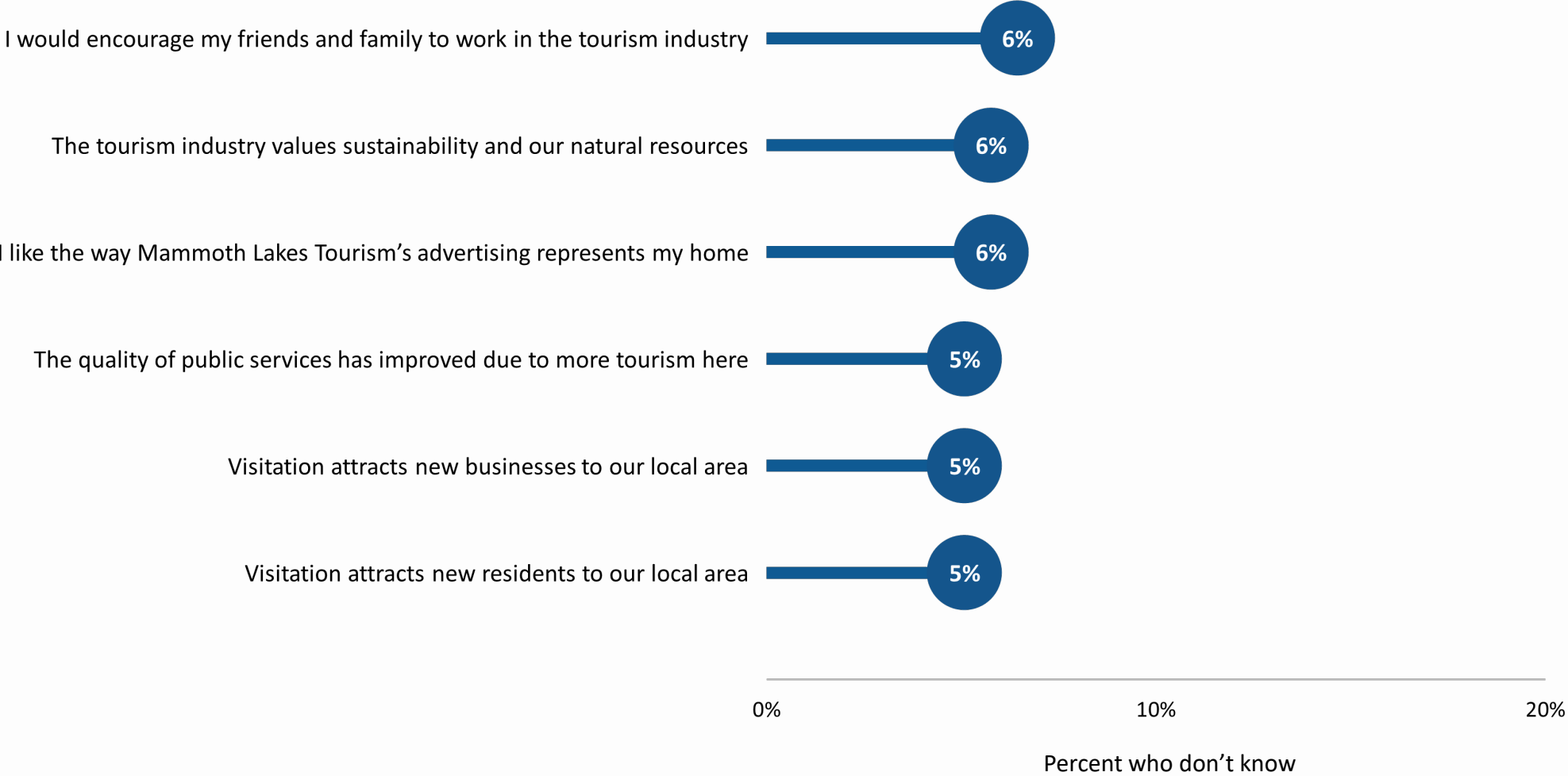
What Residents Don't Know (Cont'd)



What Residents Don't Know (Cont'd)



What Residents Don't Know (Cont'd)





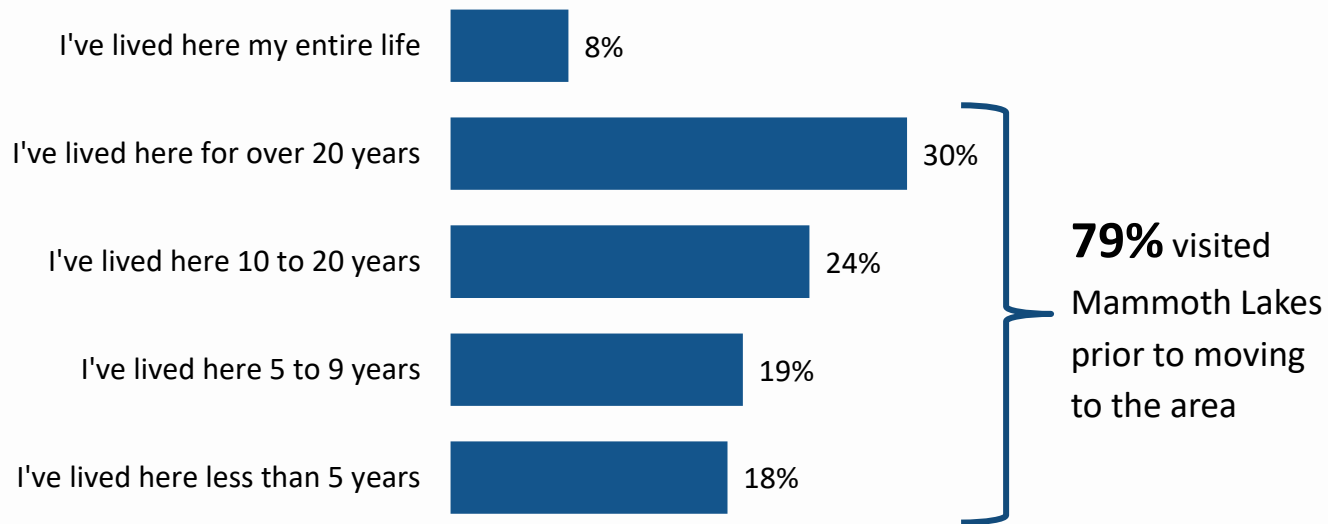
Respondent Demographics



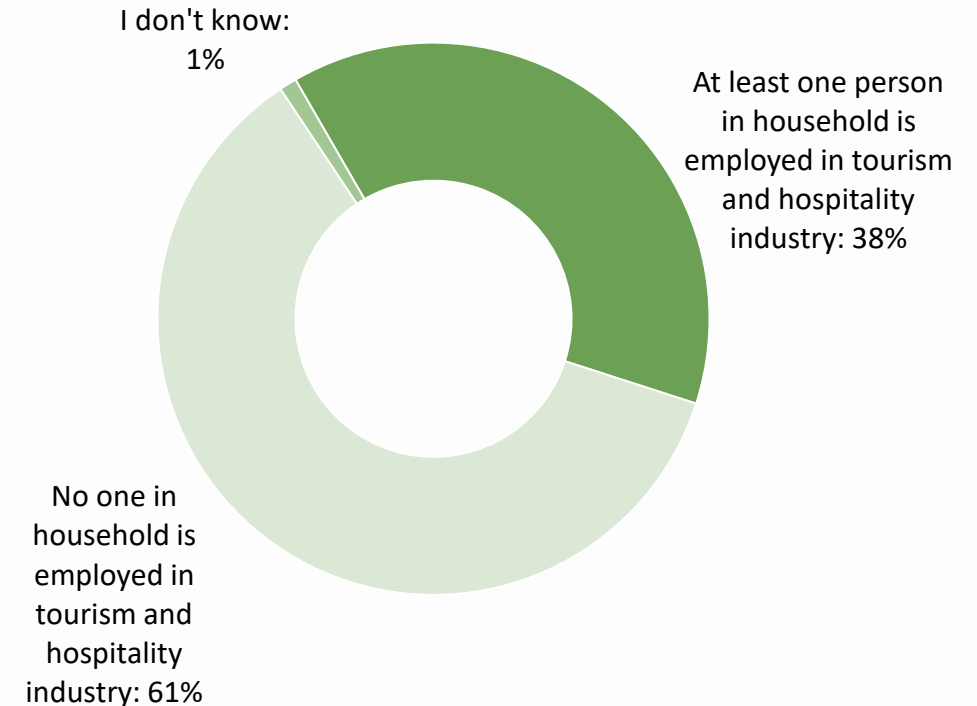
Length of Residence and Tourism Employment

Respondent Demographics

Length of Residence



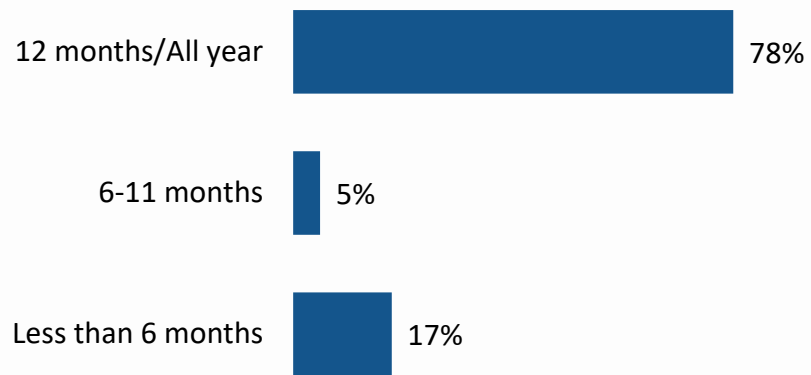
Tourism Employment



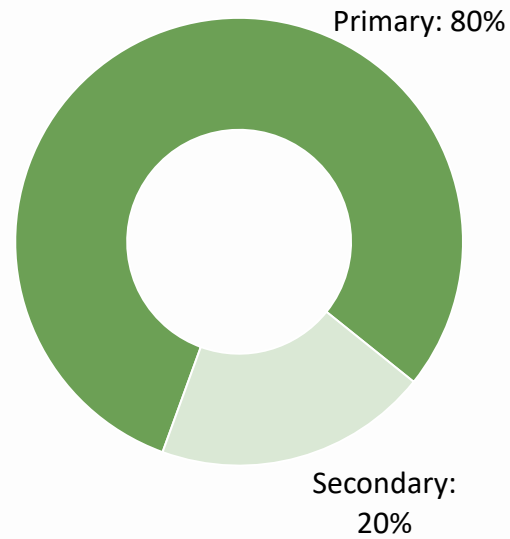
Residence

Respondent Demographics

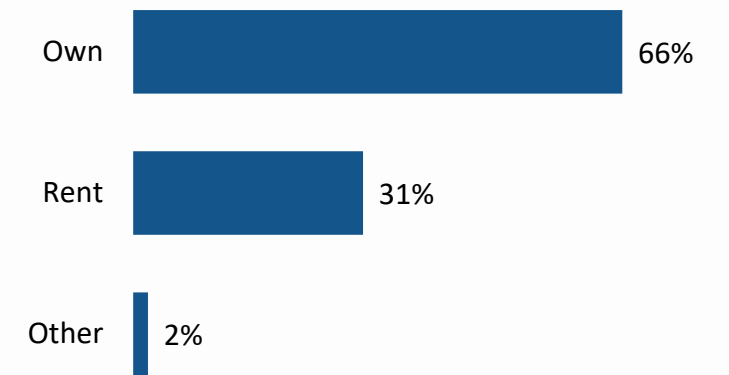
Full/Part-Time Residence



Type of Residence



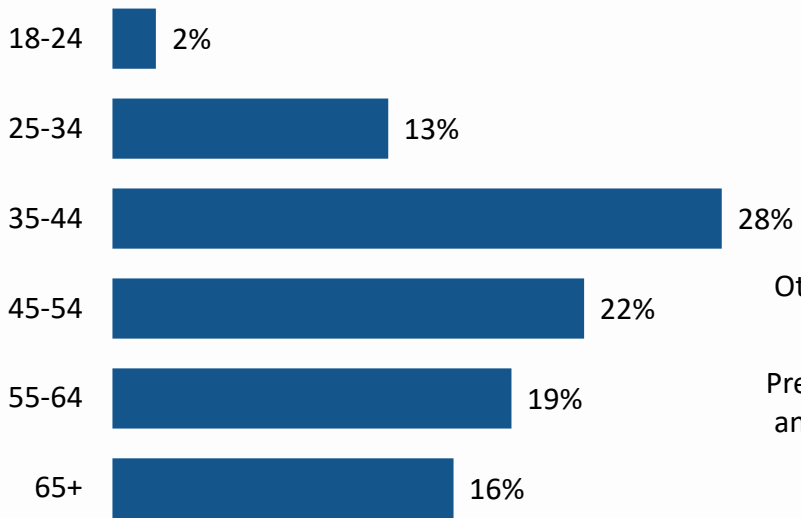
Housing Tenure



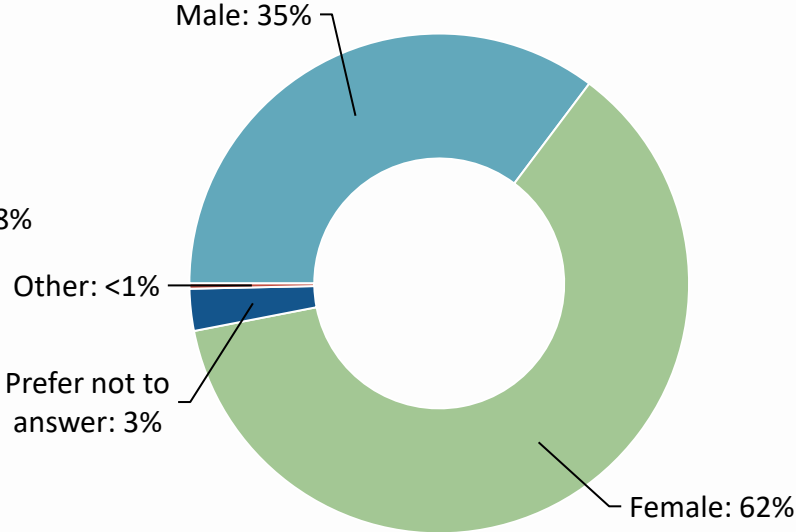
Age, Gender, and Household Income

Respondent Demographics

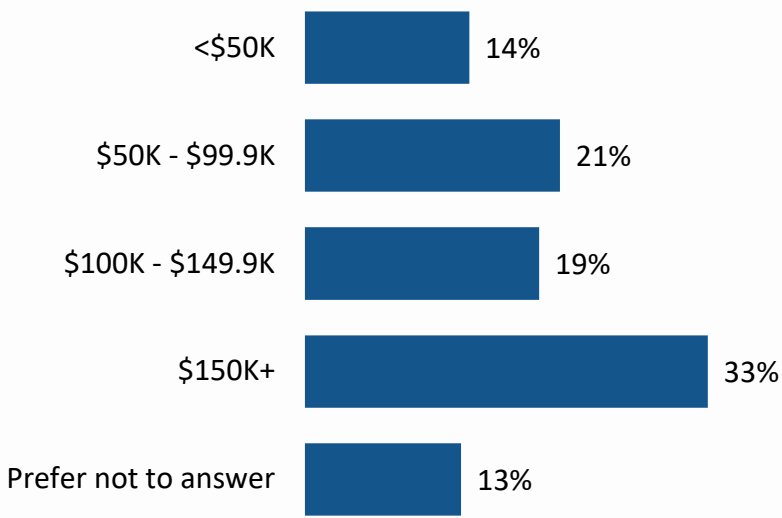
Age



Gender



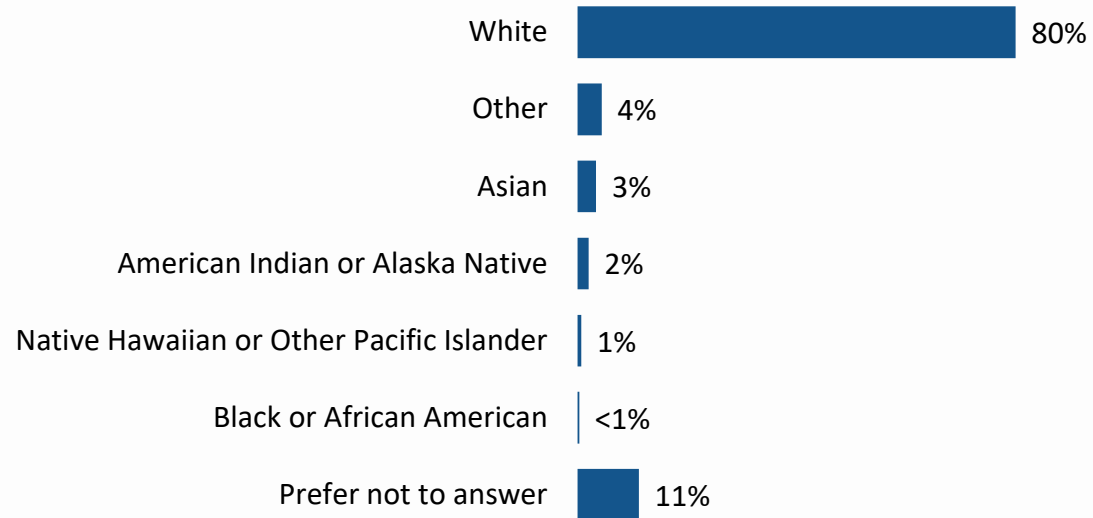
Household Income



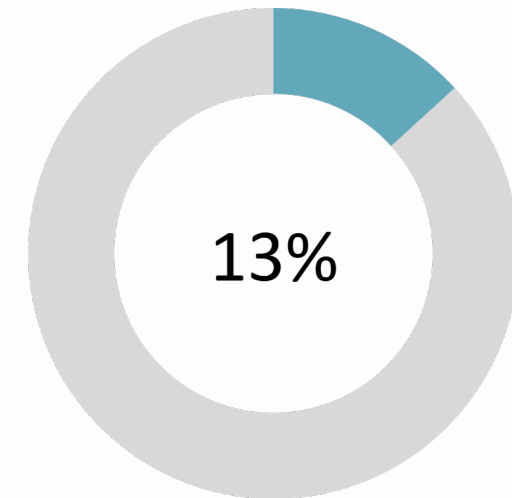
Race and Hispanic Background

Respondent Demographics

Race



Hispanic Background



Additional Demographics

Respondent Demographics

Educational Attainment

38% Post-graduate
45% College graduate
11% Some college
4% High school or less
2% Prefer not to answer

Employment Status

43% Employed in one job
23% Employed in more than one job
16% Not employed, retired, other
16% Self-employed
2% Prefer not to answer

Marital Status

65% Married, living with partner
19% Single, never married
10% Separated, divorced, widowed
5% Prefer not to answer

Household Size

27% 1 member
38% 2 members
14% 3 members
16% 4 members
5% 5+ members



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Appendix: Benchmarks



Overall Sentiment About Tourism

Benchmarks

		Agree	Neutral	Disagree
My local government is doing a good job balancing resident quality of life and visitor satisfaction	Mammoth Lakes	20%	23%	57%
	West	42%	33%	25%
	US Norm	41%	33%	26%

Tourism Development and Growth

Benchmarks

		Agree	Neutral	Disagree
We need planned and controlled tourism development	Mammoth Lakes	82%	13%	5%
	West	59%	31%	10%
	US Norm	58%	29%	12%
Tourism development is happening too fast in this area	Mammoth Lakes	56%	22%	22%
	West	31%	29%	40%
	US Norm	29%	25%	46%
Residents are consulted when major tourism development takes place in this area	Mammoth Lakes	17%	14%	69%
	West	33%	26%	40%
	US Norm	32%	26%	41%

Tourism Promotion

Benchmarks

		Agree	Neutral	Disagree
Tourism marketing reflects the diversity in my local area	Mammoth Lakes	27%	27%	45%
	West	58%	27%	15%
	US Norm	54%	27%	19%

Economy

Benchmarks

		Agree	Neutral	Disagree
Housing is becoming less affordable in this area due to tourism	Mammoth Lakes	84%	7%	9%
	West	45%	25%	30%
	US Norm	39%	24%	37%
The growth in tourism is causing prices to rise, making things less affordable for residents	Mammoth Lakes	79%	10%	11%
	West	42%	31%	27%
	US Norm	38%	29%	34%
Tourism encourages investment in our local economy	Mammoth Lakes	53%	26%	21%
	West	60%	27%	13%
	US Norm	58%	28%	13%

Tourism Employment

Benchmarks

		Agree	Neutral	Disagree
Most jobs in the tourism industry are low-paying and seasonal	Mammoth Lakes	72%	18%	10%
	West	49%	33%	18%
	US Norm	47%	33%	19%
The tourism industry offers many entry-level employment opportunities	Mammoth Lakes	71%	21%	8%
	West	60%	29%	12%
	US Norm	60%	27%	13%
There are opportunities for career advancement in the tourism industry	Mammoth Lakes	32%	29%	39%
	West	53%	33%	14%
	US Norm	51%	32%	17%
The tourism industry offers rewarding careers	Mammoth Lakes	29%	31%	40%
	West	52%	31%	17%
	US Norm	50%	31%	19%
There are jobs in the tourism industry with desirable pay and benefits	Mammoth Lakes	28%	27%	45%
	West	51%	35%	14%
	US Norm	50%	32%	18%
I would encourage my friends and family to work in the tourism industry	Mammoth Lakes	22%	24%	54%
	West	41%	34%	25%
	US Norm	40%	32%	28%

Quality of Life

Benchmarks

		Agree	Neutral	Disagree
The quality of public services has improved due to more tourism here	Mammoth Lakes	38%	26%	36%
	West	44%	31%	26%
	US Norm	41%	32%	28%
Dining opportunities are better here as a result of tourism	Mammoth Lakes	35%	23%	43%
	West	55%	26%	19%
	US Norm	52%	27%	21%
I have more recreational opportunities (places to go and things to do) because of tourism in this area	Mammoth Lakes	35%	24%	41%
	West	51%	27%	22%
	US Norm	47%	30%	23%
Shopping opportunities are better here as a result of tourism	Mammoth Lakes	25%	25%	51%
	West	49%	29%	22%
	US Norm	46%	30%	24%

Environment

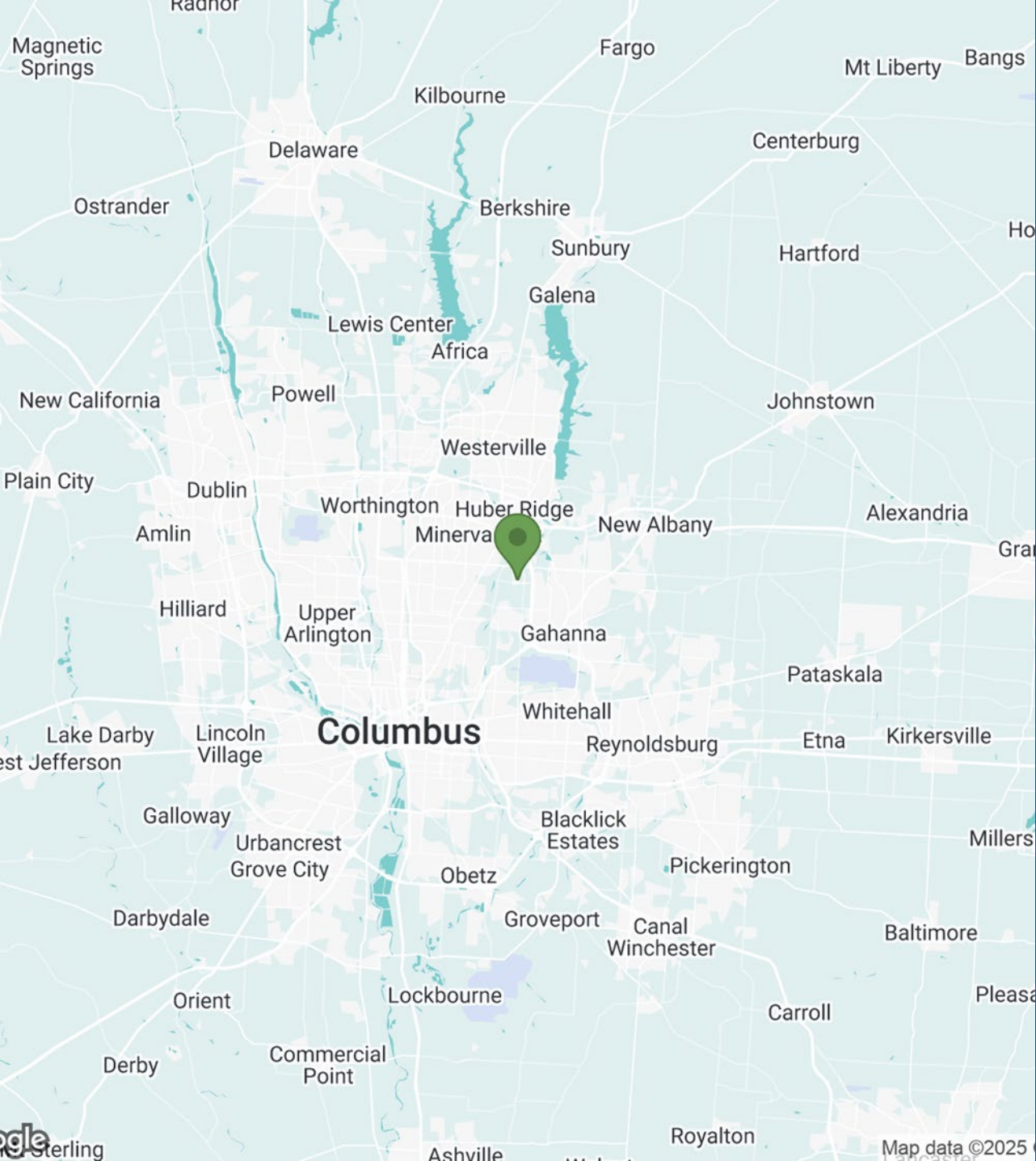
Benchmarks

		Agree	Neutral	Disagree
Long-term planning can limit environmental impacts caused by tourism	Mammoth Lakes	69%	20%	11%
	West	63%	29%	8%
	US Norm	62%	27%	10%
Overbuilding of tourism-related businesses is spoiling our natural areas	Mammoth Lakes	52%	26%	22%
	West	41%	34%	25%
	US Norm	40%	32%	28%
Tourism is a good alternative to more environmentally-damaging development	Mammoth Lakes	38%	33%	29%
	West	49%	34%	17%
	US Norm	48%	36%	16%
Tourism can help the environment as local governments and people seek to protect sensitive and scenic areas	Mammoth Lakes	35%	27%	39%
	West	51%	34%	15%
	US Norm	51%	33%	16%
The tourism industry values sustainability and our natural resources	Mammoth Lakes	22%	21%	58%
	West	43%	33%	23%
	US Norm	43%	33%	23%

Involvement/Engagement with Tourism

Benchmarks

		Agree	Neutral	Disagree
I'm proud to call this area my home	Mammoth Lakes	89%	7%	4%
	West	71%	19%	10%
	US Norm	68%	21%	12%
I look forward to showing off this area when friends and family visit	Mammoth Lakes	88%	9%	3%
	West	64%	22%	14%
	US Norm	60%	24%	16%
Visiting other places gives me a greater appreciation for my local area	Mammoth Lakes	71%	17%	11%
	West	65%	25%	10%
	US Norm	62%	25%	13%
When I come across local tourism news, I'm interested in finding out what's happening	Mammoth Lakes	67%	22%	11%
	West	55%	29%	17%
	US Norm	54%	28%	18%
I consider myself informed/up-to-date on news about tourism in this area	Mammoth Lakes	67%	22%	11%
	West	49%	29%	22%
	US Norm	47%	30%	23%
I recommend local tourist sites to people who are visiting my area	Mammoth Lakes	64%	23%	14%
	West	57%	25%	17%
	US Norm	56%	24%	20%



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