



Mammoth Lakes Tourism Monthly Board Meeting

Wednesday, January 3, 2018 - 1:00-3:00pm in Suite Z

Board Member Call in # (310) 372-7549 - Participant Code 934985 - Host Code 3838

https://www.dropbox.com/sh/zxanpoyiv7mwd9t/AAB-aHpEDShkXC2UnH79_hRJa?dl=0

Board Member Ledesma possibly calling in from 3399 Main Street Conference Room Mammoth Lakes, CA 93546

Meeting Agenda

1. **Call Meeting to Order – Brent Truax, Board Chairman**
2. **Roll Call – Brent Truax – *Chairman*** (Chamber no term), **John Morris – *Treasurer*** (Lodging June 2018 3-year term), **Kirk Schaubmayer – *Vice Chairman*** (Lodging June 2018 2-year term), **Michael Ledesma – *Secretary*** (Restaurant June 2020 3-year term), **Colin Fernie** (Town Council no term), **Sean Turner** (Retail June 2020 3-year term), **Eric Clark** (MMSA no term), **Paul Rudder** (At-Large June 2019 2-year term), **Scott McGuire** (At-Large June 2018 2-year term)
3. **Board Member Comments/Reports/Agenda Additions**
4. **Public Comment** – Please limit to three minutes or less
5. **Minutes** – Approval of past meeting minutes from December 6th
6. **Presentation** – Mammoth Track Club – Andrew Kastor – **15 minutes**
7. **New Business**
 1. Update on LA Kings partnership – **10 minutes**
 2. Update on Special Events – **10 minutes**
 3. Olympics and Mammoth athletes- **10 minutes**
8. **MLT Team Presentation Schedule – 30 Minutes**

January 3	Marketing update
February 7	International update
March 7	Chamber update
9. **Department Updates** – A brief recap of past, current and future efforts of each department – **5 minutes each**
 1. International – Michael Vanderhurst
 2. Communications/PR –Lara Kaylor
 3. Chamber of Commerce Update – Ken Brengle
 4. Air Service Update – John Urdi
10. **Financial Reports** – An update regarding the financial health of the organization – **5 Minutes**
 1. TOT & TBID – review previous months results
 2. Cash Flow and CDARS info – discussion of current bank balances and reserve account activity
 3. P&L Reports
11. **MMSA Update – Eric Clark – 5 minutes**
12. **Key Takeaways – TBD no numbers available by posting time**
 1. November came in at \$XX up from the previous record (2016) by \$XX which is X%
 2. YTD TOT is +\$XXX to the previous record (2016) and +\$XX to 2017-18 budget

Future Meeting Dates: Next scheduled Board Meeting for **Wednesday February 7, 2018** from 1-3:00pm Suite Z



Mammoth Lakes Tourism Monthly Board Meeting

Wednesday, December 6, 2017

Board Member Call in # (310) 372-7549 - Participant Code 934985 - Host Code 3838

1:00-3:00pm in Suite Z

https://www.dropbox.com/sh/zxanpoyiv7mwd9t/AAB-aHpEDShkXC2UnH79_hRJa?dl=0

Eric Clark will be calling in from the Reno Airport at 2001 E Plumb Lane, Reno NV 89502

Meeting Agenda

1. **Call Meeting to Order** – Kirk Schaubmayer, Vice Chair, called to order at 1:05pm
2. **Roll Call** –Present: Brent Truax (arrived at 1:21pm), Kirk Schaubmayer, Michael Ledesma, Colin Fernie, Sean Turner, Eric Clark (via phone), Paul Rudder, Scott McGuire
Absent: John Morris
3. **Board Member Comments/Reports/Agenda Additions-**
 - a. Scott McGuire attended the Mammoth Lakes Recreation meeting last night; Good meeting; Would like to talk later in the meeting about how all organizations, Mammoth Lakes Foundation, Mammoth Lakes Recreation, Mammoth Lakes Tourism, The Town of Mammoth Lakes etc., can all speak with one voice about the High Altitude Training.
4. **Public Comment** –
 - a. Rich Boccia – Mammoth Lakes Foundation gave quick update on the performing arts theater. Displayed drawings of building renderings, exterior and interior, and as they relate to the current structures in the area. \$13 million in commitments from Measure U and Measure C funding. Review of steps ahead and where they are at in the process. This facility down the road will need programming so there may be a partnership with MLT Event position to program. Possible breaking ground next year depending on weather this winter.
 - b. Sean Turner - Executive Director of Bluesapalooza & Mammoth Festival of Beers and owner of Mammoth Brewing Company - comment as member of public and not as member of the Mammoth Lakes Tourism Board. 2018 Bluesapalooza is officially on hold. Current site use proposal put forth by property owner of Sam's Woodsite is not financially viable or supportively encouraging of event management. We are no longer able to put tickets on sale by December 15th given the existing and unresolved circumstances. Would like to propose a Town or Tourism led leadership work with the property owners to create a financially viable and infrastructurally (sic) supportive event site that will encourage existing and new events to stay at or move to this important Town designated event site. If the Town wants to see the creation of new events or growth from existing events then the Town of Mammoth Lakes must be a true partner in this endeavor. Choice before the producers or Bluesapalooza, if an agreement cannot be reached, is to cancel, postpone or move to a location that may be less visitor friendly but economically viable; Either in or out of town. None of these are good choices but is what will need to happen if a favorable option for all parties cannot be reach. In 2017 an estimated \$50,000 was raised by local and statewide non-profits that were involved with Bluesapalooza. And we will be sending out a press release.
5. **Minutes** – Approval of past meeting minutes from November 1st
 - a. Colin Fernie motioned to approve the minutes from the November 1 Board meeting unchanged; Michael Ledesma seconded the motion. Scott McGuire abstained from voting, as he was not present. Unanimously approved.
6. **Presentation – TOML - MMSA – MLT partnership with the Los Angeles Kings** - Stu Brown, Town of Mammoth Lakes Parks and Recreation department gave presentation to the Board on possible partnership with Los Angeles Kings in regards to the Multi-Use Facility. Proposal before the Board today is join Mammoth Resorts and the Town of Mammoth Lakes to secure a 6-year \$2 million partnership agreement with Los Angeles Kings for sponsorship and brand activation of all regular Home games at the Staples Center.
 - a. The LA Kings have a huge presence in the Southern California Market; the majority of LA kings fans are also visitors to Mammoth. Over 60% are from the core DMA of the LA Kings. Regular season attendance averages at 747,000. Lots of overlap between their guests and our guests. Kings fan are

three times more likely that the average LA adult to go skiing/snowboarding; Of those LA adults planning a ski trip in the next 12 months, 1 in 4 is most likely going to be a Kings fan.

- b. Details of agreement in excel spreadsheet given to the Board; Mammoth Resorts has a current 1-year agreement for activation of 25 home games. This agreement would commit to a six-year sponsorship deal, and Mammoth Resorts would commit 2/3 of the funding; Town of Mammoth Lakes is asking for a 30% match for the Mammoth Lakes Tourism portion and the TOML would match 4% for their contribution. About 13 cents per fan for the total six-year exposure, reaching 4.5 million fans at the Staples Center. Very cost effective way to reach a large number of visitors.
- c. Specifically requesting \$100,000 per year for six years from Mammoth Lakes Tourism, commencing this year. Would add additional 16 games to existing agreement with Mammoth Resorts. Mammoth Resorts would be the lead contract/brand through this proposal and the official partner of the Los Angeles Kings
- d. Funding proposed to come from joint fund bucket between Town Council and MLT. Not from any existing operational funding. Considerable leveraging opportunity for MLT; for a \$600,000 investment, \$2 million of promotional value received. Brent Truax arrived.
- e. The Los Angeles Kings will make a \$1 million dollar donation through Mammoth Lakes Recreation towards the Multi-Use Facility, providing an opportunity to Mammoth Lakes Recreation to leverage those funds to complete funding requirements for that facility.
- f. ASEC manages all of the LA Kings arenas; talking with them about a program management agreement which would have them oversee all LA Kings branded programming at the ice rink. We would sell them the ice time to facilitate those programs.
- g. Significant cooperative that is going to increase visitation through branding opportunities, realization of a recreation destination and adding a new visitor driving amenity with generation of new and unique facility users.
- h. Paul Rudder: Are we being asked to spend \$600,000 to advertise Mammoth Mountain?
 - i. Stu Brown: Mammoth Mountain is the most distinctive brand in Southern California so it makes a lot of sense for us to partner with that brand; Really the objective of this partnership is to drive visits through this lead brand.
 - ii. John Urdi: Looking to leverage their investment, taking it to another level and looking at it as rising tides, float all boats.
- i. Paul Rudder: Seems like we are devoting public funds to the benefit of a single private enterprise. I would like to have a consult with legal counsel if we can do that.
- j. Scott McGuire: supportive of the idea, concerned about the same things Paul mentioned, like to know what the benefit to the rest of the community is and how that rolls out. Like the activity component, leveraging the Kings to bring people in for camps during October and November. The joint fund is based on a windfall to the annual TOT but what does this look like if the TBID goes away? Is Town of Mammoth Lakes prepared to put more money in if that happens?
 - i. John Urdi: Proposal at this point would be to earmark the first \$600,000 in the fund for this purpose – about \$400,000 in that fund now. Only 4 months into joint fund right now.
 - ii. Scott McGuire: Have we talked with Council about earmarking over \$500,000 right away for one project?
 - iii. Colin Fernie: I can speak for myself only; been involved in the process and think it's a valuable use of the funds. Council will have discussion at tonight's meeting.
 - iv. Scott McGuire: I am concerned committing so much money to promote an organization that has not committed back to this community by supporting the TBID, the funding we will use to support this partnership.
- k. Stu Brown: The goal here today is to get some of the questions and concerns out there; we have a meeting with the partnership group on Friday and want to keep moving forward. Initial conversations did indicate that there may be some opportunities for the Visit Mammoth brand but I can't speak to those specifics.
- l. Michael Ledesma: Seen the presentation in the arena and it is very impressive - some of the best marketing of our community, outside our community. Partnering with a world-class organization like this is a big deal and brings the possibility of great partnerships, in all kinds of arenas. Share the

concerns well stated by fellow Board members, but would like to see us move forward because the possible benefit to our community is huge.

- m. Sean Turner: Is this a deal for the naming rights?
 - i. Stu Brown: That is really the purpose of Friday's meeting; to clarify expectations and the LA Kings investment in our facility.
 - ii. Sean Turner: would like to see design be more sustainably oriented. TBID renewal must be a component of this. My concern is shared. Tourism is investing a lot of money, and we need to look at full community benefit when it comes to this amount of investment.
- n. Public comment from Jeff Posey: Spend a considerable amount of time and money travelling with a Tahoe team because Mammoth does not have enough ice time to support a program here. Supporting this rink is supporting California Hockey; there are over 35 teams in both northern and southern California, with each team supporting multiple different age/gender/ability teams. There are more than 25,000 registered members in USA Hockey in California. Huge opportunity for a new visitor set to come to Mammoth who spend a lot of money of lodging, food, etc., over multi day tournaments. This is not just an investment in Mammoth Mountain; it's an investment in our community and in bringing the California Hockey community to Mammoth. We are sitting on a gold mine.
- o. Public comment from Patrick Bernard, President of Mammoth Youth Hockey: Mammoth as a brand is Mammoth Mountain. They are one in the same; Mammoth is the Mountain, fishing, biking, etc. The Kings are the biggest brand in Southern California and we are missing out by not working with them. Whether we are the mountain, or the town, we should work as one for a great opportunity.

7. New Business

- 1. Discussion and vote on direction for the Los Angeles Kings Partnership – add notes from above to this section.
 - a. Colin Fernie: appreciate the comments; never met anyone who wasn't an expert in marketing, I can appreciate concern but I am going to defer to John, our Executive Director, when it comes to message and marketing. I have been and we completely dominate their ad space. Don't think people really make delineation in generating a trip to Mammoth; but maybe there is room for the Visit Mammoth logo and branding. Want to make sure we don't dilute the message. Keep in mind this partnership is already off the ground with Mammoth Resorts. If Town chooses to pull out, Mammoth Resorts can proceed alone and then I think that is a missed opportunity for the Town. This is a leveraging opportunity for us; it's also a partnership opportunity. Kind of seems like the TBID is being held hostage over air service. I don't support that tactic and if we are going to be asked to join mutually beneficial partnerships, then that needs to be addressed. Unfair expectation that Mammoth Lakes Tourism will be playing ball, if our partner on the other end is not willing to play ball. Holding the TBID hostage is a detriment to the entire community.
 - b. Scott McGuire: diagram on could, should and will. Tend to fall in love with what could happen, but when we are acting with public dollars we need to focus to what will happen. I am ok losing money on "a could" and "should" in my private business, but that is not our obligation to the public. Fully support it but not when we are speculating with public dollars; we need to get a few more things in the will bucket.
 - c. Sean Turner: echo same thing. Fully supportive as long as the TBID is supported by MMSA.
 - d. Kirk Schaubmayer: Same. Agree with Scott. Agree with the public. Are we a mountain with a town or a town with a mountain? What is good for the goose must be good for the gander. With changes that happen on this Board as well as the Mountain, it would be important to make sure that our agreement is written to make sure there is equal partnership in all endeavors.
 - e. Paul Rudder: applaud town work on this; creative and forward thinking. If we are going to expand the awareness of Mammoth, I get that we have to do stuff like this. I am concerned that we are spending a lot of money to advertise Mammoth Mountain.
 - f. Scott McGuire: From a different perspective we are investing \$600,000 and getting a \$1 million dollar investment out of it, which works out to a positive of \$400,000. We also get to partner with the Kings Organization in one of four facilities for them; there is a high marketing drive for them; the content and events that could be created is good. We are choosing a single town partner to jump into this with but if Snowcreek came to us and said they would be able to bring the PGA here and build all these facilities but you need to support our event, and its going to

- produce \$500,000 for town, I find it hard to believe the Board would not talk to them about that opportunity. And aside from how we feel about the Mountain, they have opened the door for the opportunity to happen and right now there is no other vehicle to get this kind of benefit.
- g. Eric Clark: Mammoth Mountain is not trying to get the community to pay for their message, but is willing to commit to a longer sponsorship deal to be a good partner with the benefit to the community; Mammoth Mountain is willing to invest more money and look at branding to be a good partner for the Town.
 - h. Scott McGuire made a motion to earmark \$600,000 from the joint fund for this deal with the contingency that money remains coming out of the joint fund, MMSA supports the TBID, and that there is a pathway for Mammoth Lakes Tourism to benefit from this deal, some other aspect that engages the rest of Town/outside of the resort. Sean Turner asked that there be a legality check on spending public dollars to support one organization. John Urdi would also add that the TBID continue to be renewed and in place; ongoing support. Sean Turner seconds the motion.
 - i. Eric Clark abstained from vote; unanimously approved. Final MOU will come back to the Board for final approval.

John Urdi addressed remaining time in the meeting. Brent Truax revised the order in which remaining agenda items would be heard. Moved to The Crib Presentation, then back to discuss remaining new business items.

8. MLT Team Presentation Schedule – High Altitude Training Crib options

Lara Kaylor reviewed The Crib and the agenda for presentation, including details on ROI.

Public comment from Alexi Pappas on her Crib story and how it shaped her running career, what it provided for her; incredible opportunities. The Crib is something that has the ability to show the other sides to Mammoth and other athletic training that is happening off the ski hill. Thanks for having this experience available. Mammoth Lakes is THE place where Olympic athletes want to train, visit and live if possible. This town gives a home feel like none other.

Lara Kaylor jumped ahead to financial discussion in the interest of time. In Board packet is an evaluation of two condos we have looked at and how it would break down financially. Comparison between renting and purchasing; This is just an example; not what the exact ones we are looking to purchase.

- Colin Fernie: need to look at 25% down payment, instead of 20% down payment because it won't be owner occupied. Don't need to worry about transient rental issues, because these will not be paying guests. Year round Crib is a no brainer.
- Lara Kaylor: ideally looking at 3 bed/2bath – the unit we have been using is 3 bedroom with a loft, so the more athletes we can get in the better. Need to have a place by March; Board of Relators contacted the relator community and asked for those who are interested to submit their names; and then we will pick on out of the hat
- Scott McGuire: \$60,000 investment for \$750,000 worth of impressions is definitely worth it; the ROI just makes sense. Real clear alignment on message and how it benefits Town and the greater community. Maybe also bring in our video producer to make sure that we have a good space to for interviews. Support purchasing.
- John Urdi: may need an Ad Hoc group to make sure we move quickly.
- Paul Rudder: we have the opportunity to really develop a Mecca for High Altitude training. Motion to direct staff to consider the purchase of a property and come back to the board with options. Colin Fernie seconded the motion and added the creation of ad hoc committee to move quickly on the right property; Colin Fernie also volunteered; Scott McGuire and Paul Rudder and Michael Ledesma volunteered. Unanimously approved.

7. New Business (continued)

2. Discussion and vote on upfront JetSuiteX subsidy payments –
 - a. Review of conversation from last board meeting in regards to making the upfront deposit for the subsidy with JetSuiteX.
 - b. Colin Fernie: comfortable moving forward. This is another partnership opportunity and I think appropriate to mention my previous comments; if we are being asked to step up in these capacities, I would ask the same of Mammoth Mountain Ski Area.

- c. Paul Rudder made a motion to take over upfront subsidy funding for the 2017-18 time period- Michael Ledesma seconded the motion. Unanimously approved - no abstentions
3. Discussion and vote on direction of MLT events plan and position –
- a. John Urdi reviewed process and documents from the Special Events sub committee; reviewed one sheet summarizing event position goals and structure. Two positions: Executive Director and coordinator. Both job descriptions are attached to Board packet. Streamlining, also looking at sponsorships; lives within Mammoth Lakes Tourism – will have a staff monthly report. Funding would come from MLT, with \$125,000 from the town; will look to the Town to make that funding source long term. Budget, gave a summary of partial year (March through end of fiscal year) and a complete year.
 - b. Brent Truax: 1 to 3 events doesn't seem like a large number of events for this kind of staffing?
 - i. John Urdi: The group felt like the amount of events and in the size requested is pretty sizable and we did not want to set someone up for failure.
 - ii. Scott McGuire: But they are only selling the event producers on coming to Mammoth, not putting the event on.
 - iii. Sean Turner: I can see that point but my concern at this point is does this sales person have event spaces to sell. Right now we need to start with an inventory of what this person can sell to event producers to get them to Mammoth. However, at this point I am not sure they have anything to sell.
 - c. Scott McGuire: My concern is how they work with the other involved town entities, and what is a more clear picture of what success looks like.
 - d. Colin Fernie: I am supportive of two positions, because its two different roles with two very different skills set.
 - e. Colin Fernie asked John Urdi to review the numbers. \$125,000 will come from the town from general fund. The Town has committed to those funds for this year, but probably need that to continue moving forward and also possibly look to the Town for help with the operational budget; MLT will add \$50,000 towards new need time events and possibly operational budget. \$175,000 would be available to event producers. An event committee, with representatives from chamber, mlt, rec. commission and town, to evaluate request for funding from producers.
 - f. Eric Clark: Think we need to add another running event, outside of peak time, October/September. I would like to see a little bit more definition on success, but comfortable with two positions.
 - g. Michael Ledesma: I don't want to sound like I have cold feet about these positions as I fully support them. But I am a little shaken by the fact that the one event we have that is multi day and brings in 5,000 people to town, is on hold because of the event venue issues. And I think we need to talk about that.
 - h. John Urdi: I think it may be something that the initial MLT group who worked with Dirk on The Woodsite, go back to him to figure out what is going on.
 - i. Paul Rudder motioned to direct John Urdi to start looking to fill Events Director position and events coordinator position. Kirk Schaubmayer seconded. Unanimously approved.
 - j. Paul Rudder proposed a subcommittee to look into the issues with The Woodsite. John Urdi would like to reconvene initial group on the agreement with the town and figure out how to address this. The group is composed of Paul Rudder, John Urdi, and John Morris. Also, bringing in a representative from the Town as the agreement is between the Woodsite and the Town.

10. Financial Reports – An update regarding the financial health of the organization –

- 1. TOT & TBID – October was up over last year with a new record of \$601,000; TBID is still a little bit behind for the year; \$50,000 or 3%
- 2. Cash Flow and CDARS info – discussion of current bank balances and reserve account activity
 - 1. Measure A checking account \$1.31 million; savings \$5,010
 - 2. TBID checking account \$551,000; savings \$5,005
 - 3. CDARS: Measure A \$1.75 million; TBID \$2.5 million
- 3. P&L Reports: Scott McGuire had a question about the income from the Visitor's Guide.
 - 1. John Urdi: on this month P&L the budget shows \$15,000, but what you are seeing has to do with everything coming in early.

7. New Business (continued)

4. Assign ad hoc panel to discuss Executive Director contract –
 - a. Brent Truax asked for three members to form a committee to look over new contract for Executive Director. Michael Ledesma volunteered; Colin Fernie and Brent truax volunteered
 - b. John Urdi asked that this group also be a part of looking at the contract with the Town. Both are up in June. All agreed to sit on that as well.

9. Department Updates – postponed to next meeting due to time.

11. MMSA Update – Eric Clark – postponed to next meeting due to time.

12. Key Takeaways

1. **October came in at \$601,248 up from the previous record (2016) by \$33,843 which is 6%**
2. **YTD TOT is +\$144,948 to the previous record (2016) and +\$1,707,648 to 2017-18 budget**

Future Meeting Dates: Air Strategic Plan presentation by Mead & Hunt **Thursday, December 7, 2017** 2-4pm Suite Z
Next scheduled Board Meeting for **Wednesday January 3, 2018** from 1-3:00pm Suite Z



Mammoth Lakes
CALIFORNIA

MAMMOTH LAKES TOURISM
MARKETING PLAN

FISCAL YEAR 2017-2018





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FROM A MOUNTAIN WITH A TOWN, TO A TOWN WITH A MOUNTAIN

Mammoth Lakes has long been a year-round destination for avid, active outdoor enthusiasts – from hikers and bikers to skiers and snowboarders. Many would call Mammoth Lakes a ski town, but we feel this would be a disservice to the plethora of activities that guests enjoy in non-winter months.

As a destination, we have always been known for the world-class ski and snowboard experience provided by the very aptly named Mammoth Mountain. In a sense, and in reality, the town of Mammoth Lakes has fallen in the shadow of the mountain. The goal has been to expand from being simply a ski town with a world-class mountain to a world-class town that just so happens to have an amazing ski resort as its backdrop.

Mammoth Lakes Tourism appreciates all 365 days of the year, all four seasons and all activities and amenities that the amazing Eastern Sierra has to offer. With natural wonders like Devils Postpile National Monument, Yosemite National Park, Bodie State Park and Mono Lake nearby to complement our active outdoor adventures, Mammoth Lakes is truly the basecamp for the unbelievable.

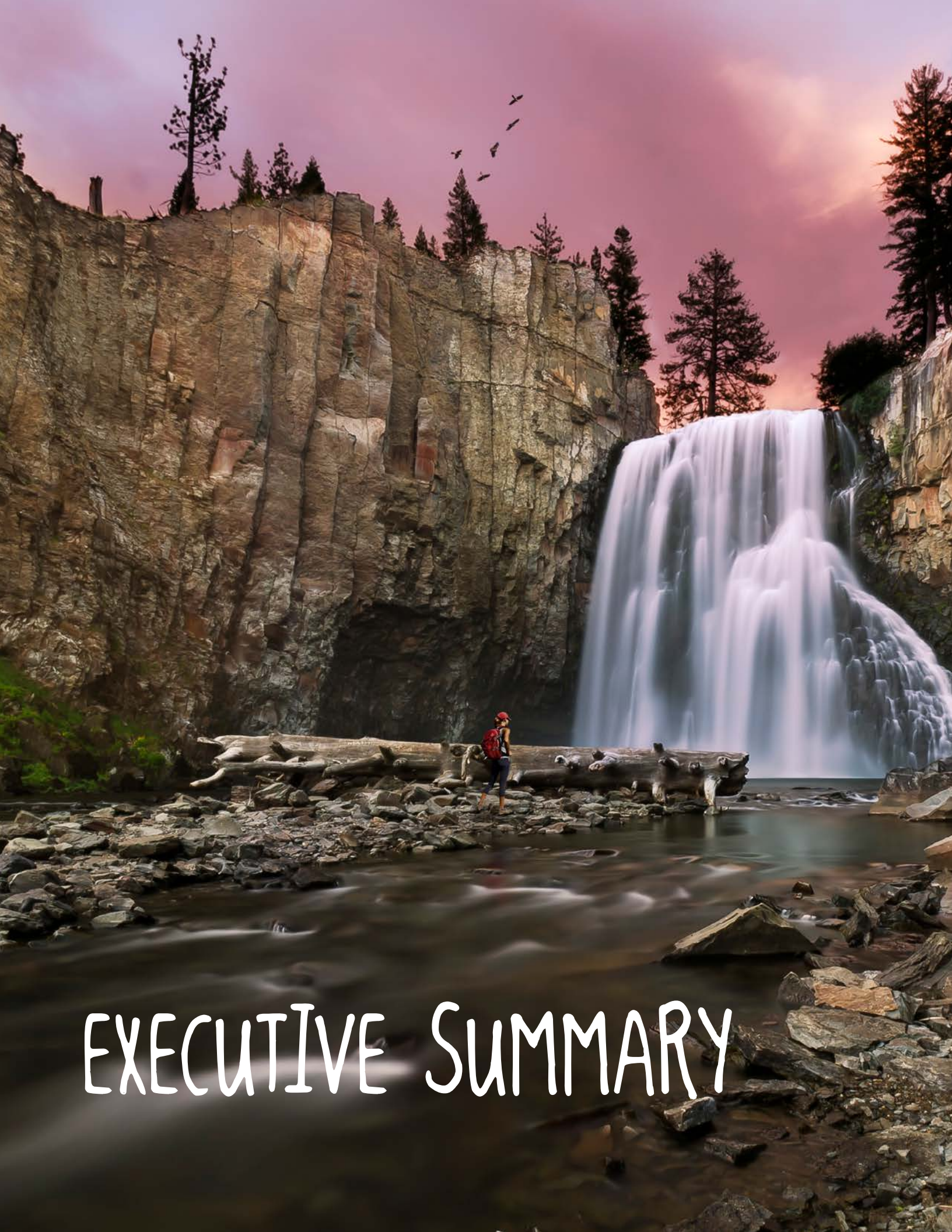
With resources such as our Tourism Business Improvement District in place, our funding is finally competitive with other destinations around California and these funds allow us to tell the Mammoth Lakes story to the world.

Through extensive research and reporting, MeringCarson and the Mammoth Lakes Tourism team develop marketing campaigns and initiatives to maximize our exposure, awareness and ultimately drive increased visitation and revenues for our local businesses.

Every one of Mammoth Lakes Tourism's efforts is driven by the desire to make our tourism-based economy, and the businesses who thrive from it, as successful as possible. We look forward to continued collaboration with our local partners to strengthen our community.

JOHN URDI

Executive Director
Mammoth Lakes Tourism



EXECUTIVE SUMMARY

MAMMOTH LAKES TOURISM WAS ESTABLISHED TO INCREASE LEISURE TRAVEL TO THE MAMMOTH LAKES AREA.

BUSINESS OBJECTIVES

Make Mammoth Lakes a strong year-round destination.

- Generate a minimum of \$1 million transient occupant tax (TOT) per month for 10 out of 12 months of the year (minimize the seasonal peaks and valleys)
- Have a consistent visitor base to sustain occupancy levels and employment base year-round
- Support air service and drive utilization
- Provide stable and consistent annual visitation to attract new investment and development opportunities to the market

BACKGROUND

Forming of Mammoth Lakes Tourism

In 2008, a review of competitor organizations spurred discussions between the town manager, town council and community stakeholders to create a non-governmental organization for the town's tourism marketing needs. The sentiment was that the Town of Mammoth Lakes' government was not driving enough visitation through its Tourism and Recreation Department (responsible for tourism and recreational programming) as a result of a lack of focus and expertise.

The first formation meetings took place in early 2010, and by July 2010 Mammoth Lakes Tourism was formed as a destination marketing organization. Mammoth Lakes Tourism was funded through politically committed dollars from Measure A that can only be used for marketing purposes. Mammoth Lakes Tourism received 2.5 points of the 13% transient occupancy tax (TOT) and business license certificate revenues, totaling approximately \$2.2 million annually.

A seven-member board hired its first employee in July of the same year.

Mammoth Lakes Tourism Today

In September 2013, Mammoth Lakes Tourism (MLT) began collecting on a Tourism Business Improvement District (TBID) with a 1% assessment on lodging stays, 1.5% assessment on retail and restaurant purchases and 2% on ski area lift tickets and lessons. All of the other 99 current California TBIDs only assess lodging. This assessment contributes roughly \$5-6 million to the annual marketing sales and communication budget.

Town of Mammoth Lakes' (TOML) Measure A also funds the organization, which comes from the Transient Occupancy Tax (TOT). MLT receives 18.07% of all TOT revenue, but it is capped at \$2,259,000 for operations. Anything in excess is deposited into a joint fund where Mammoth Lakes Tourism's Board of Directors and the TOML Town Council determine its use, which could include marketing and/or visitation-based infrastructure projects.

With the increased level of funding, Mammoth Lakes Tourism has grown its in-house team to seven people and its Board of Directors from seven to nine members.

	PRE-TBID	POST-TBID
Incremental Trips	117,433	224,042
Full Dollar Value	\$173 MILLION	\$341 MILLION
Total Media Impressions	36 MILLION	196.7 MILLION
Website Visits	846,528	1.9 MILLION
PR Value	115 media placements led to 330 MILLION impressions (\$990,000 value)	137 media placements led to 783.1 MILLION impressions (\$2.34M value)

Source: SMARI 2014-15 Advertising Effectiveness, ROI Wave

Guiding Principles

Tourism to Mammoth Lakes helps to create jobs essential to the area that provide opportunities for all. Increasing tourism requires a collaborative effort between Mammoth Lakes Tourism and the Mammoth Lakes business community. The following principles guide the program of work and the way Mammoth Lakes Tourism works with the community.

DO WHAT INDIVIDUAL BUSINESSES CANNOT DO FOR THEMSELVES

Mammoth Lakes Tourism provides a marketing sales and communications platform to promote the Mammoth Lakes brand and destination. Mammoth Lakes Tourism serves as an authority on travel and tourism to the Town of Mammoth Lakes and engages in opportunities and partnerships that will elevate the profile of the area. Mammoth Lakes Tourism unifies business and community leaders to raise the relevance of travel to the destination and enhance the area.

DELIVER VALUE TO & COLLABORATE WITH TOURISM-RELATED BUSINESSES

Mammoth Lakes Tourism is the resource to the area's assessed businesses by providing marketing support and opportunities, website leadership, authoritative tourism research, brand development and messaging framework, partnering opportunities and other resources vital to the success of their operations.

BUILD AWARENESS & PREFERENCE FOR THE MAMMOTH LAKES BRAND TO STIMULATE TRAVEL

Mammoth Lakes Tourism will develop marketing programs that attract new visitors to the destination through the brand, while boosting the image of Mammoth Lakes overall. Enhanced marketing investment will provide opportunities to reach new markets that may have otherwise been cost-prohibitive.

LEVERAGE ALL ASSETS & ALLIANCES

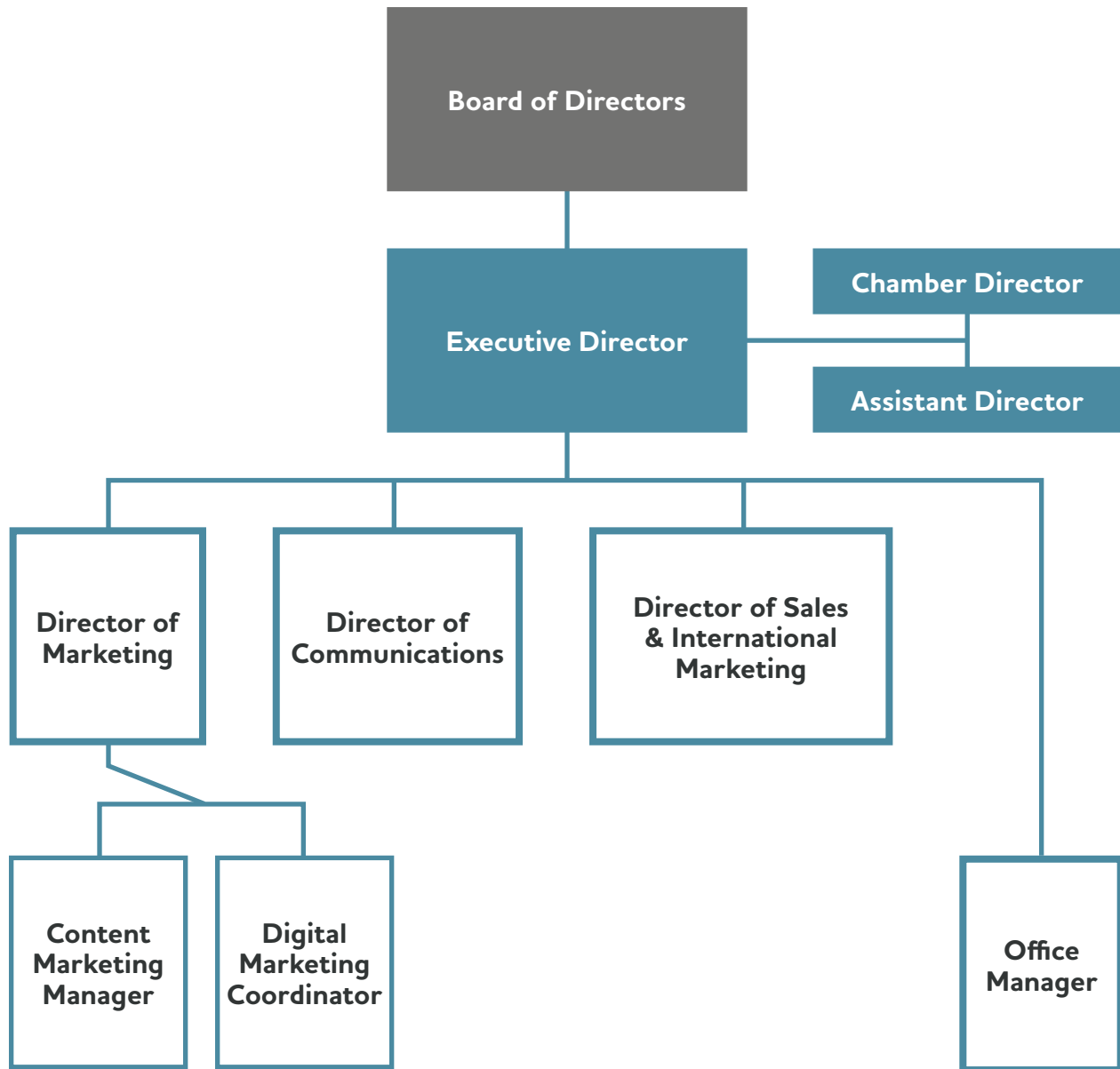
Mammoth Lakes Tourism will introduce the Mammoth Lakes brand to far-reaching audiences and establish strategic alliances with trusted in-market brands. Partnerships support efforts to develop relationships and elevate the area's overall image through advertising and other venues, with the goal of raising awareness of the Mammoth Lakes area regionally and in selected countries.

TRACK KEY METRICS & ROI TO INFORM THE STRATEGIC DIRECTION OF THE PROGRAM OF WORK

Mammoth Lakes Tourism will track and evaluate program impact on attracting leisure travelers to reinforce the organization's value to travel-related businesses and the Mammoth Lakes community.

Organizational Chart

The primary role of Mammoth Lakes Tourism is to deploy awareness-focused efforts promoting the overall destination in order to reach potential visitors and deepen engagement with existing visitors.

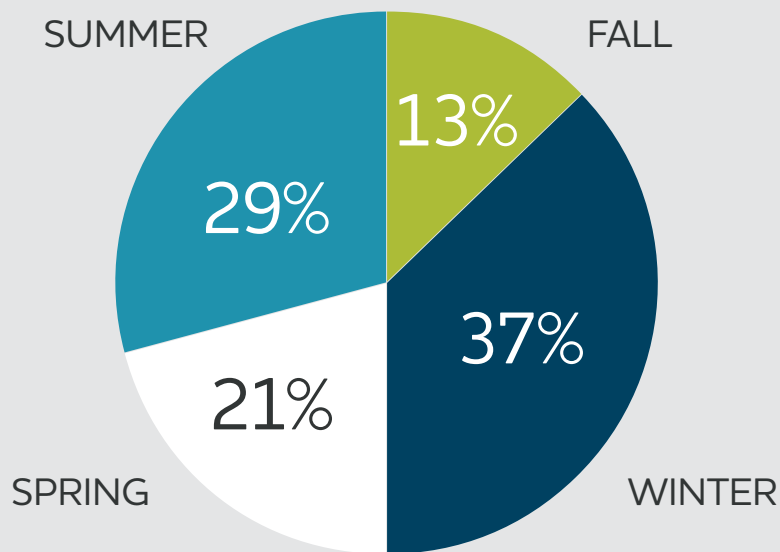


Mammoth Lakes Tourism's Visitor Impact on the Mammoth Lakes Economy

ANNUAL VISITORS TO MAMMOTH LAKES

2,323,979

SHARES OF VISITS BY SEASON



Source: SMARI 2016 Visitor Profile Survey

ECONOMIC IMPACT OF PROGRAM

For every \$1 spent, the Mammoth Lakes Tourism marketing effort brought in more than \$5

TOTAL ECONOMIC IMPACT

\$340M

LOCAL TAX IMPACT

\$9.2M

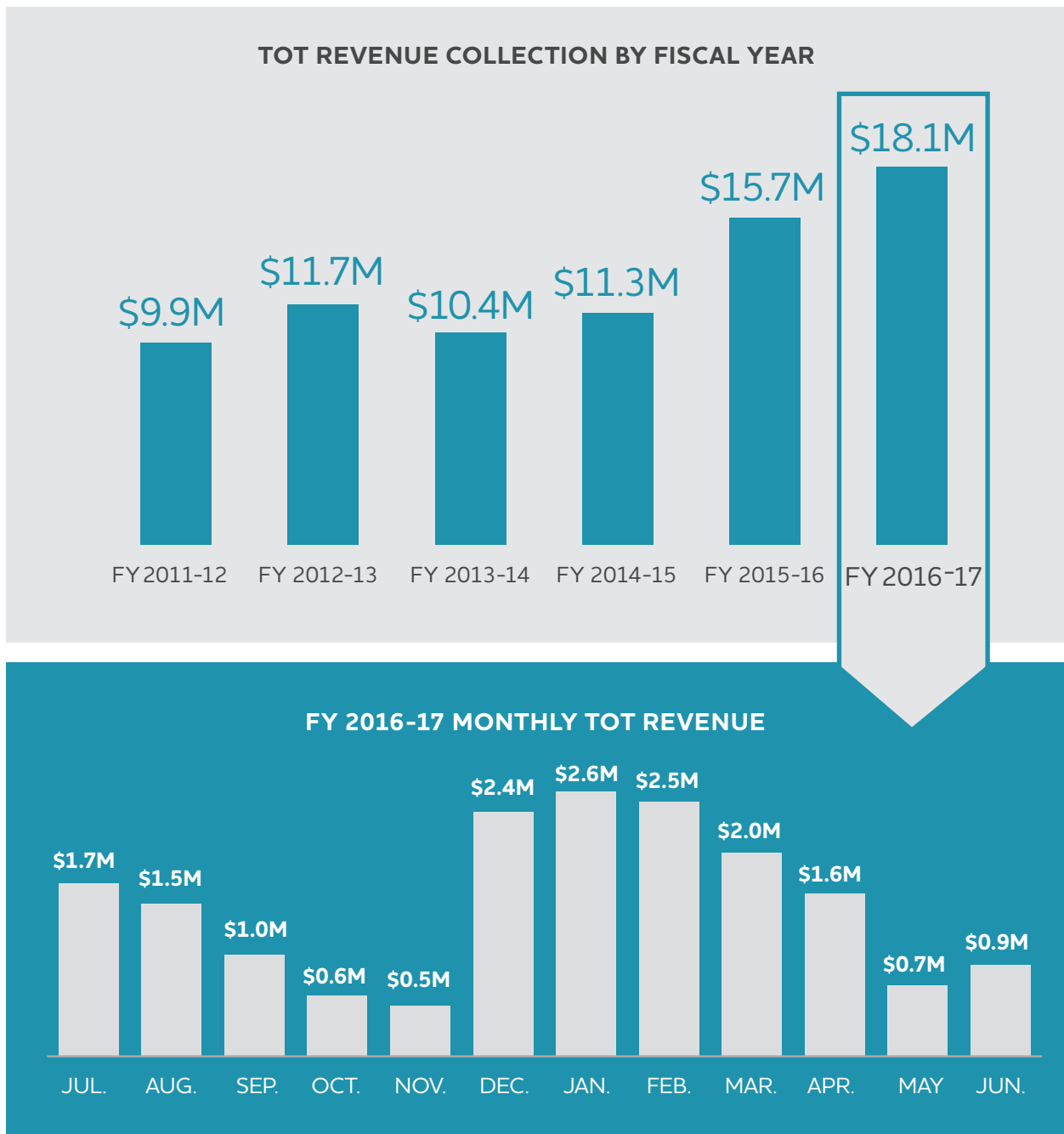
TAX ROI

\$5.37

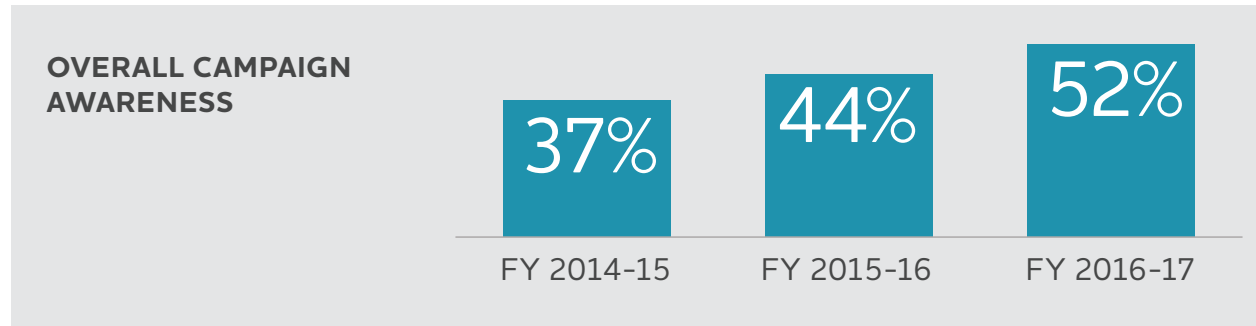
Source: SMARI 2016-17 Awareness and ROI Survey, October 2017

Mammoth Lakes Tourism Increases Town of Mammoth Lakes Budget

Key to Mammoth Lakes marketing is driving year-round visitation to the destination. The goal of Mammoth Lakes Tourism is 10-month viability; more than \$1 million of TOT per month and more balanced seasonality through marketing. The success of this strategy is seen in sustainable TOT collections through drought periods and the growing ability to attract and sustain year-round visitation.

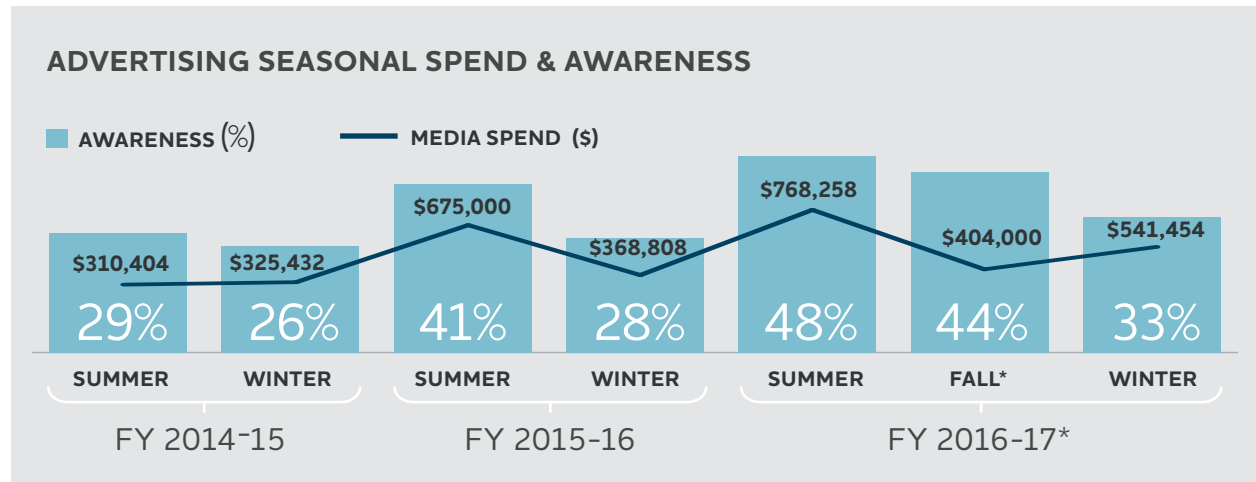


Mammoth Lakes Tourism Marketing Results



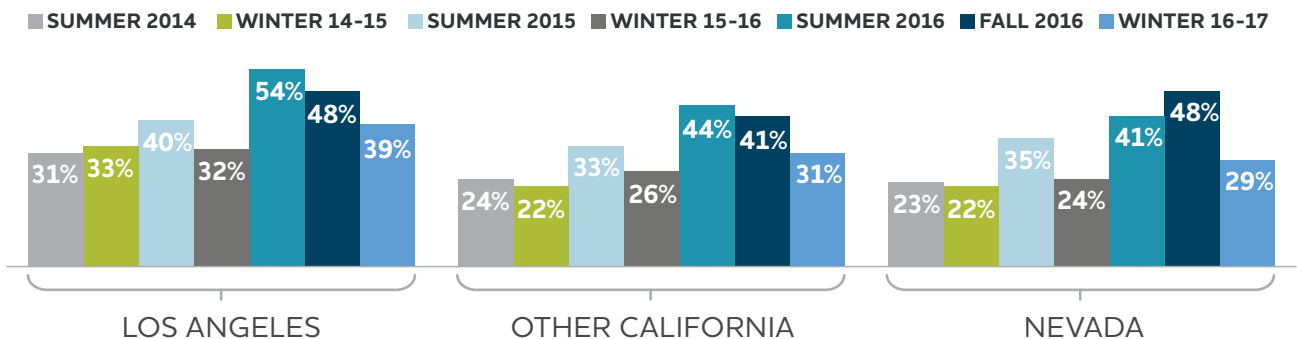
Awareness is on the rise, driven by a combination of the following factors:

- Increased budget
- Broader media mix
- Efficient buying and optimization
- Creative that effectively communicates key benefits and motivates travel



*FY 2016-17 was the first year a separate fall effort was supported by Paid media. Source: SMARI Winter 2016-17 Advertising Effectiveness Research

CAMPAIGN AWARENESS BY REGION

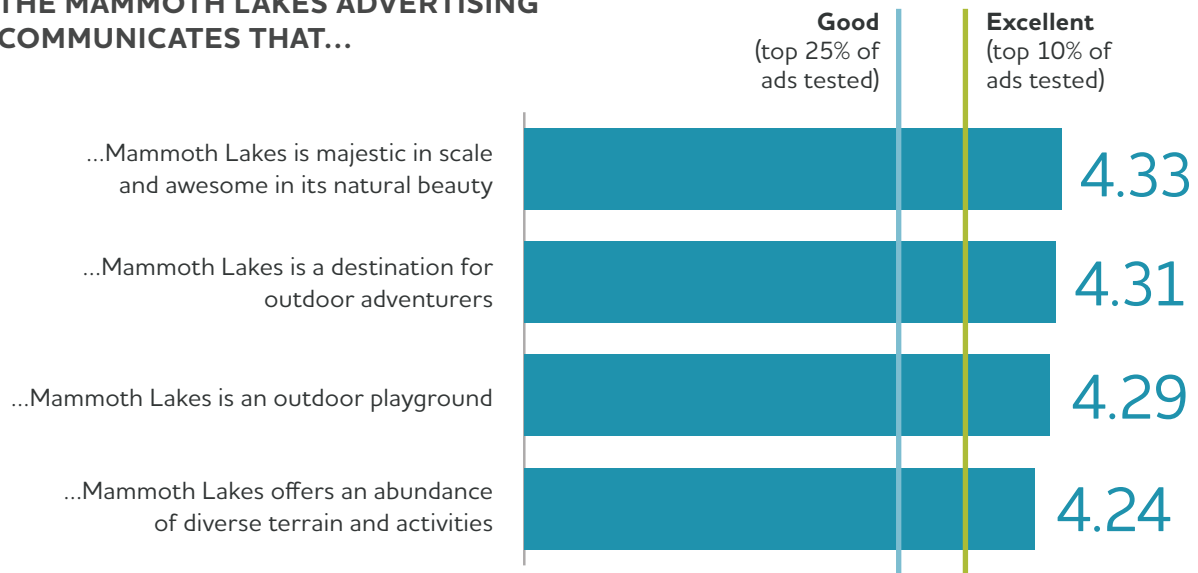


Source: SMARI Winter 2016-17 Advertising Effectiveness Research

Campaign Impact

Impact ratings show that the campaign is communicating key messages and influencing travel behaviors by increasing consideration and desire to visit Mammoth Lakes. The campaign is excellent at communicating Mammoth Lakes Tourism’s key assets.

THE MAMMOTH LAKES ADVERTISING COMMUNICATES THAT...



Source: SMARI 2016-17 Awareness and ROI Survey, October 2017

Incremental Travel

The tracking survey shows the campaign is impacting travel to Mammoth Lakes.

- In summer 2016, outdoor travelers aware of summer ads took **64,000 more trips** to Mammoth Lakes than those unaware of the campaign.
- In fall 2016, fall ad-aware outdoor travelers took **99,000 more trips** than unaware travelers.
- In winter 2016-17, respondents aware of the winter campaign took **60,000 more trips** to Mammoth Lakes.

NOTE: Qualified trips were those within the defined seasons, where one trip was taken and paid lodging was used.
 Source: SMARI 2016-17 Advertising Effectiveness Research ROI Wave, October 2017



RESEARCH & INSIGHTS

Tourism destinations are subject to a variety of environmental influences, including economic, demographic, social and cultural trends, and travel trends. Therefore, it is important to characterize and understand the dynamic environment in which Mammoth Lakes Tourism and the destination is operating. The following is a summary of key trends and implications for Mammoth Lakes Tourism.

SITUATIONAL ANALYSIS – EXTERNAL

Economic Analysis

Overall forecasts show the U.S. economic indicators ending the year with slight increases. Some recent projections have predicted a softening of the economy. Even so, the gross domestic product (GDP) is expected to grow by 2 percent each year through 2020. Other economic measures, including consumer confidence and personal income, are also expected to grow, while unemployment remains low.

California's economy continues to do well, with growth of the GDP and personal income and a drop in unemployment. Like the U.S. forecast, California may also see a slowing of the economy as we move into 2018. Other economic indicators show similar patterns to U.S. indicators, with slow and steady growth through 2020.

Mono County is heavily dependent on the recreation and tourism industry. Overall unemployment rate is projected to stay below the state unemployment rates through 2017. Leisure and hospitality was the only sector with significant job gains during 2015. Professional services, business and financial sectors saw small declines, while other sectors remained steady.

Economic Indicators

	UNITED STATES	CALIFORNIA	MONO COUNTY
GDP Growth Rate 2020P	2.0% 1.9% 2016	2.6% 1.9% 2016	N/A
Consumer Confidence Feb. 2017 ¹	116	111	N/A
U.S. personal income is projected to rise 11.9% between 2016 and 2020. California personal income is projected to rise 18.9% between 2016 and 2020.	\$16,056 +11.9%	\$2,567.30 +18.9%	\$0.81 +20.8%
Unemployment Rate Jan. 2017	4.7%	5.1%	4.3%
Inflation Rate 2020P	2.5% 2.7% 2016	3.0% 2.7% 2016	3.0% 2.7% 2016

1. Consumer confidence is an indicator of the degree of optimism consumers have regarding the state of the economy. An index above 100 is positive.

Tourism Industry Analysis

INCREASE IN TOTAL EXPENDITURE IN U.S.

The U.S. Travel industry ended 2016 with a 1.0 percent increase in domestic person trips. Total expenditures also increased 2.1 percent to \$990.3 billion.

- Domestic person trips totaled nearly 2.2 billion in 2016, including 1.7 billion leisure trips and 458.9 million person trips for business purposes.
- The U.S. received 77.6 million international arrivals in 2016, with 39.2 million coming from overseas international markets and 38.4 million coming from Canada and Mexico.

The U.S. Travel Association projects that travel to and within the U.S. will grow 3.1% by the end of 2017¹.

PROJECTIONS SHOW GROWTH

Currently, industry projections show continued tourism growth, both domestically and internationally, through 2020. At the same time, experts warn that performance should be interpreted with caution as the strong dollar and new policies related to travel restriction, immigration, and international relations could eventually negatively impact visitation.

CALIFORNIA TOURISM REMAINS STRONG

California's tourism industry expanded for the seventh consecutive year, with both domestic and international travel to California growing, but at a slower rate. Total visits were up 1.9 percent (2016). Visitation and number of trips to California is forecasted to grow by 2.1 percent in 2017. The long-term outlook forecasts growth at a similar rate, with an overall slower and steady growth pace in total visitation to California of a little over 2.0 percent per year. By 2020, total visits are expected to be 220.0 billion, up 8.9 percent vs. 2016, and increase to 301.4 billion by the end of 2021.

Total direct travel spending to California was \$126.3 billion in 2016, representing a 3.1 percent increase over 2015. For 2017, total direct spending is projected to be at \$130.3 billion, a 3.1 percent increase from 2016. Visitation for 2017 is projected at 274.1 million person-trips, with 224.2 million leisure trips (82 percent). By 2020, total expenditures are projected to be at \$151.5 billion, 19.3 percent higher than 2016.

LOCAL SPENDING IS UP

Mono County direct travel spending was up 8.5 percent over 2015, to \$662.4 million. The increases continue to drive growth in jobs and tax revenues. Between 2016 and 2020, the majority of all employment growth will occur in the leisure and hospitality sector, accounting for 63 percent of total wage and salary growth. The majority of this comes from Mammoth Lakes.

1. U.S. Travel Associations Travel Forecast Model 6/2/2017

Sources: California Travel & Tourism Outlook, Tourism Economics (Oxford Economics) April 2017; California Travel Impacts by County, 1992-2016P, Dean Runyon & Associates, May 2017

Importance of Air Service to Marketing Mix Analysis

AIR TRANSPORT CONTRIBUTES TO SUSTAINABLE DEVELOPMENT

By facilitating tourism and trade, it generates economic growth, provides jobs and increases revenues from taxes.



Investors currently considering development or expansion in Mammoth Lakes have stated that they would not consider investing in the area if Mammoth Lakes did not have air service.

THE DEMAND FOR AIR TRANSPORT HAS INCREASED STEADILY OVER THE YEARS

Passenger numbers have grown by 45% over the last decade and have more than doubled since the mid-1980s. Airline service plays a strategic role in expanding access to Mammoth Lakes and increasing the number of visitors.



75%

of visitors who flew to Mammoth Lakes said they would visit more often with increased flight access

AIR TRANSPORT PROVIDES SIGNIFICANT SOCIAL BENEFITS FOR AREA RESIDENTS

28%



of those flying to Mammoth Lakes are residents or their family and friends

- Air service provides increased accessibility for its residents and their friends and families, and also attracts professional talent.
- Air transport improves quality of life by broadening people's leisure and cultural experiences. It provides a wide choice of holiday destinations around the world and affordable means to visit distant friends and relatives.
- Air transport helps to improve living standards.

WITH HIGHER TRIP SPENDING, AIR VISITORS HAVE A STRONG ECONOMIC IMPACT ON THE MAMMOTH LAKES COMMUNITY



ECONOMIC IMPACT

\$17
MILLION

AIR VISITORS OUTSPEND DRIVE VISITORS BY

31%

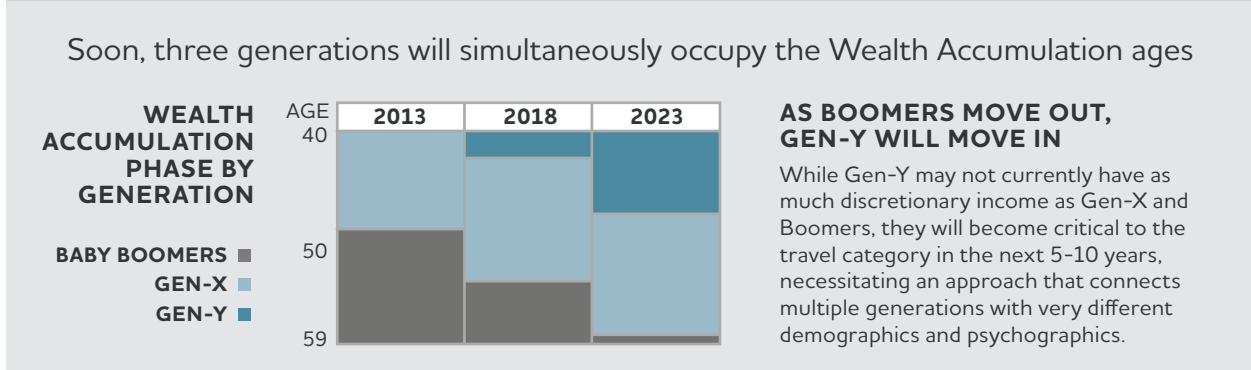
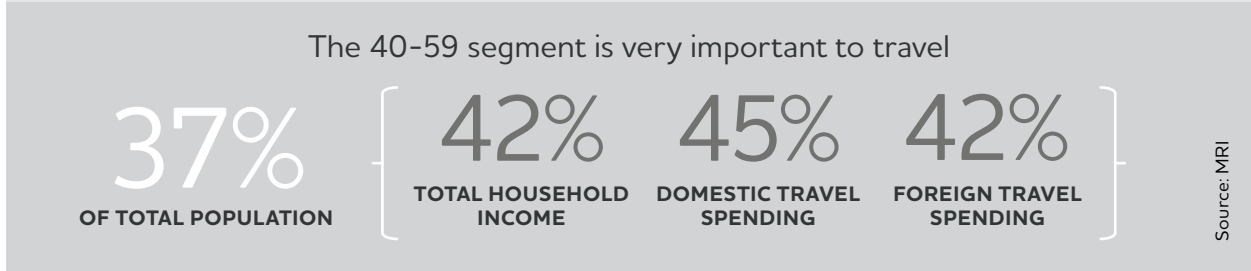
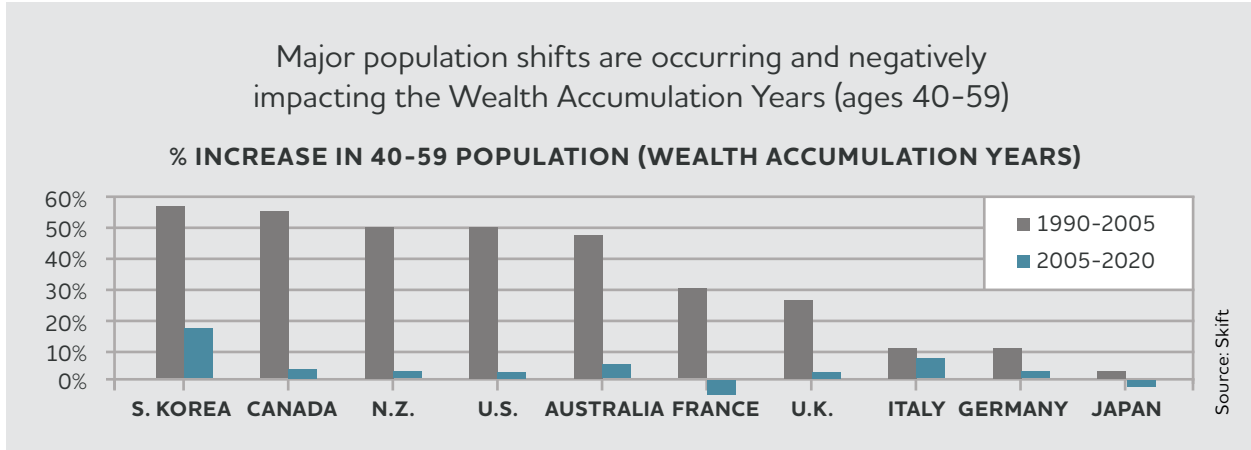
TOTAL TRIP SPENDING

\$2,177 AIR VISITORS
\$1,657 DRIVE VISITORS

Sources: 2014-15 SMARI ROI; 2016 SMARI Air Survey

Trends Related to Tourism Marketing

Population of Those Traveling is Shifting



Source: Visit California Marketing Plan

INSIGHTS

Tapping into passions, interests and desired type of vacation is more important than demographics. Most of Mammoth Lakes Tourism’s recent marketing efforts have expanded messages and content to showcase the abundance of year-round activities and address seasonal target audience variations.

Cultural & Travel Consumer Trends

In addition to economic trends, cultural trends also impact travel and tourism. The specific trends outlined below tend to overlap and, together, bode well for the Mammoth Lakes destination.

NATURE IS NURTURE

Communing with nature is not new, but increasing attention is being placed on the health benefits of nature. As nature is being viewed as an antidote to stressful living, travelers are increasingly turning to the great outdoors to rejuvenate and find space, silence and simplicity.



ADVENTURE TRAVEL + NEW BREED OF EXPLORERS

Adventure travel is on the rise, and expected to grow by 46 percent by 2020. For today's explorer, the great outdoors is no longer something to be tamed, but rather its own rich source of culture to be experienced.



MINDFUL OPTIMIZATION

Americans are known for having especially high anxiety levels, and for the first time in several years, stress levels have reportedly increased. This trend is causing Americans to seek purpose, serenity and mindfulness. There is a profound realization of the need to be in the moment. This trend is also redefining luxury as something precious, rare and most important, rather than something to be owned.



AUTHENTICITY

Authenticity continues to be a standout consumer value.¹ There is a desire to know the story behind products and services so they can be trusted, and visits to the local scene and concepts of real and imperfect are emphasized.

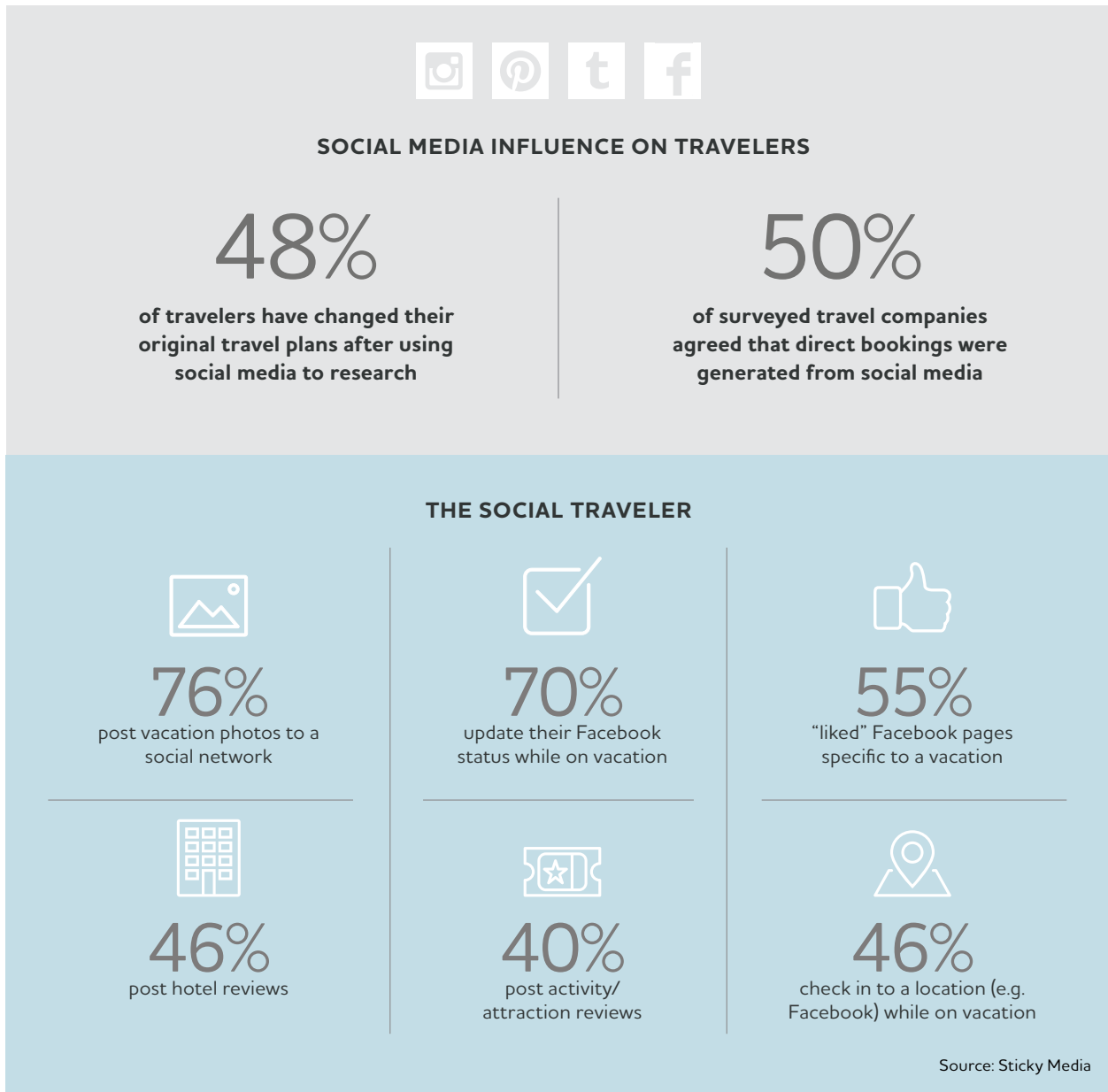


INSIGHTS

Mammoth Lakes offers visitors the ultimate outdoor destination. Brand themes uncovered in early research revealed Mammoth Lakes as an authentic destination, a natural playground, and a place that is unique and possesses pristine natural beauty. Drawing on cultural and travel trends and continuing to support the brand themes to position the destination in a highly relevant way shows how Mammoth Lakes is a place of active adventure as well as balance and serenity.

1. Source: Euromonitor 2017

Connecting in an Evolving Landscape: Rise of the Social Traveler



Source: Visit California Marketing Plan

INSIGHTS

As the travel planning landscape shifts to a heavily mobile process, social media platforms provide brands with invaluable access to consumers through their day-to-day interactions. Whether through peer sharing or brand messaging, social media is a key source of travel planning, and Mammoth Lakes Tourism capitalizes on this user behavior with targeted campaigns designed to inspire and drive action.

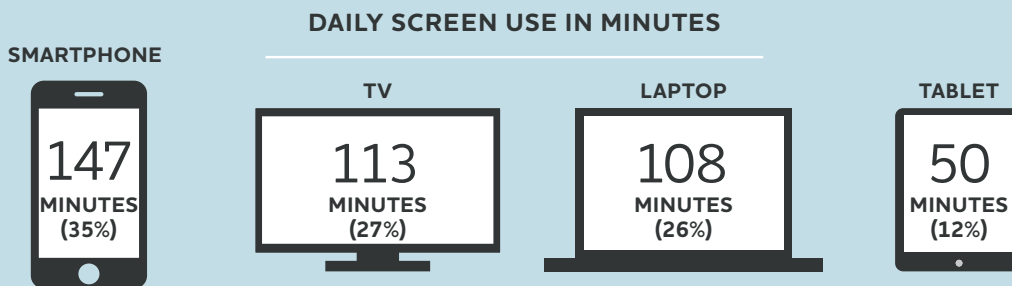
An Omniscreen Experience Tailored to Individual Preferences

Traditional networks are putting more programming online, and Netflix and YouTube are putting online video on more TVs than ever before.
As the lines blur, “television” is becoming any video and “TV” is becoming any screen.



Source: CNET.com, August 16, 2014

A typical global multiscreen user consumes just under 7 hours of screen media daily, with smartphones now comfortably the largest single-screen medium around the world.



Source: Millward Brown, Ad Reaction 2014

Source: Visit California Marketing Plan

INSIGHTS

Cross-device media buying is crucial in the digital space. Digital video consumption by device continues to change – desktop viewership declines across all partners while living room viewing shows significant increases.





- **Online TV:** +20%
- **Mobile/Tablet:** +2%
- **Desktop:** -23%

Two-thirds of the U.S. population now streams, eclipsing DVR usage rates. With the rise of streaming came subscription video on demand (SVOD), and over half the population in the U.S. now has a SVOD service.¹

1. eMarketer Q2 2017 Digital Video Trends
 Sources: 2014-15 SMARI ROI; 2016 SMARI Air Survey

SITUATIONAL ANALYSIS – INTERNAL

MLT PESTE Analysis

	ADVANTAGES & OPPORTUNITIES	CHALLENGES
GLOBAL 	Mammoth Lakes Tourism has positive working relationships throughout the world <ul style="list-style-type: none"> • China • South Korea • Brazil • Continental Europe • Australia • India 	How the world sees the U.S. <ul style="list-style-type: none"> • Changing U.S. nationalism and travel and immigration policies, as well as a strong dollar, may impact tourism • Early 2017 international visitation to the U.S. shows a decline of 4.2% with 697K fewer visitors coming to the United States. This represents an economic loss of \$2.7 billion in spending in the U.S.
NATIONAL 	Strong partnerships and relationships <ul style="list-style-type: none"> • U.S. Travel, Brand USA, U.S. Congress, FAA 	Tourism assets under multiple jurisdictions <ul style="list-style-type: none"> • U.S. Forest Service, National Park Service, Bureau of Land Management, campgrounds run by independent contractors under federal contracts
STATE 	Strong partnerships and relationships <ul style="list-style-type: none"> • Visit California and CalTravel — MLT Directors serve on multiple committees, decision-making roles and leadership • Awareness among peers has grown exponentially over last 5 years 	Tourism assets under multiple jurisdictions <ul style="list-style-type: none"> • CA State Parks, Los Angeles DWP, Mammoth Lakes town
LOCAL 	Positive working relationships <ul style="list-style-type: none"> • Mono County, the Yosemite region and the Eastern Sierra • Mammoth Mountain majority business leaders; local government processes TOT and TBID funds 	Different entities impact Mammoth Lakes Tourism budget <ul style="list-style-type: none"> • Council recommending Measure A fund be designated • Support from community businesses needed to pass TBID • TOT funds at risk of being allocated to spending on areas other than tourism

OPPORTUNITY

National and California tourism are expected to continue growing, but at a slower rate. Positive working relationships and partnerships at all levels – from global to local – will be key to building the Mammoth Lakes destination. Continued success in growing tourism visitation and revenue will show the value of investing in marketing.

Economic

ADVANTAGES & OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> • Mammoth Lakes Tourism funding secured by TBID until 2018, and renewal in 2018 is set to secure until 2028. • Record-breaking town budgets as a result of increased TOT • Beginning to realize goal of 10-month economic viability of over \$1 million in TOT per month <ul style="list-style-type: none"> - Started at 6 months viability, now at 9 months - Seasons becoming more balanced through marketing • Targeted markets are growing <ul style="list-style-type: none"> - Southern California continues to show growth potential - Growth in new regional markets is trending up - In spite of political change, international visitation has grown and is projected to continue growth for the state 	<ul style="list-style-type: none"> • Increased funding behind marketing efforts is producing results, but threats to budget and other funding pressures could stifle momentum <ul style="list-style-type: none"> - Mammoth Lakes Tourism is responsible for airline strategy and subsidy • Operating and permitting for new business in the area is cumbersome due to the multiple-agency ownership <ul style="list-style-type: none"> - Processes can deter incoming business entities and reduce economic stimulation

OPPORTUNITY

There is one industry in Mammoth Lakes – tourism. Tourism directly employs 68% of the Mammoth Lakes workforce.¹ Additionally, 73% of the town’s general fund comes from sales tax and transient occupancy tax (TOT), and 95% of these tax revenues are generated by visitors to the destination.² The TBID, which began collection in 2013, secures funding for Mammoth Lakes Tourism specifically for destination marketing, and adds no new overhead to the organization, which drives economic benefit and a proven positive return on investment for the destination.

Social

ADVANTAGES & OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> • Mammoth Lakes originated – and has grown – based on the tourism industry alone • Professional and educational growth is limited in the area <ul style="list-style-type: none"> - Limits business leaders’ awareness of current business best practices - Limited qualified workforce 	<ul style="list-style-type: none"> • Residents are supportive of Mammoth Lakes Tourism; however, efforts are continuously misunderstood • Shared economy such as Airbnb, VRBO, Home Away and others have greatly reduced local workforce housing options, causing crisis in recent years

OPPORTUNITY

Mammoth Lakes Tourism can continue to play a key leadership role in educating residents and businesses about the value of the investment in tourism marketing for the region through local PR, events and outreach such as the TBID collateral piece produced in 2016.

1. Source: Strategic Marketing Group 2. Source: Dean Runyan Associates

Technology

ADVANTAGES & OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> • Digital 395 was completed and has significantly improved connectivity for locals and guests • Shared business space opened in 2017 to attract professional workforce and increase economic development • Largest snowmaking operation in the Sierras • Proposals for a multi-use facility with Olympic-size hockey rink and event center have been approved • New airport terminal approved 	<ul style="list-style-type: none"> • Connectivity is still lacking relative to attracting economic development to the area <ul style="list-style-type: none"> - Several businesses still have basic internet - Many businesses do not have a strong web presence - Attracting new businesses is a challenge without the developed infrastructure

OPPORTUNITY

Tourism plays a significant role in the development of the region. As tourism grows, continued improvements must be made to meet the needs of travelers and raise the level of amenities available to both travelers and residents.

Environment

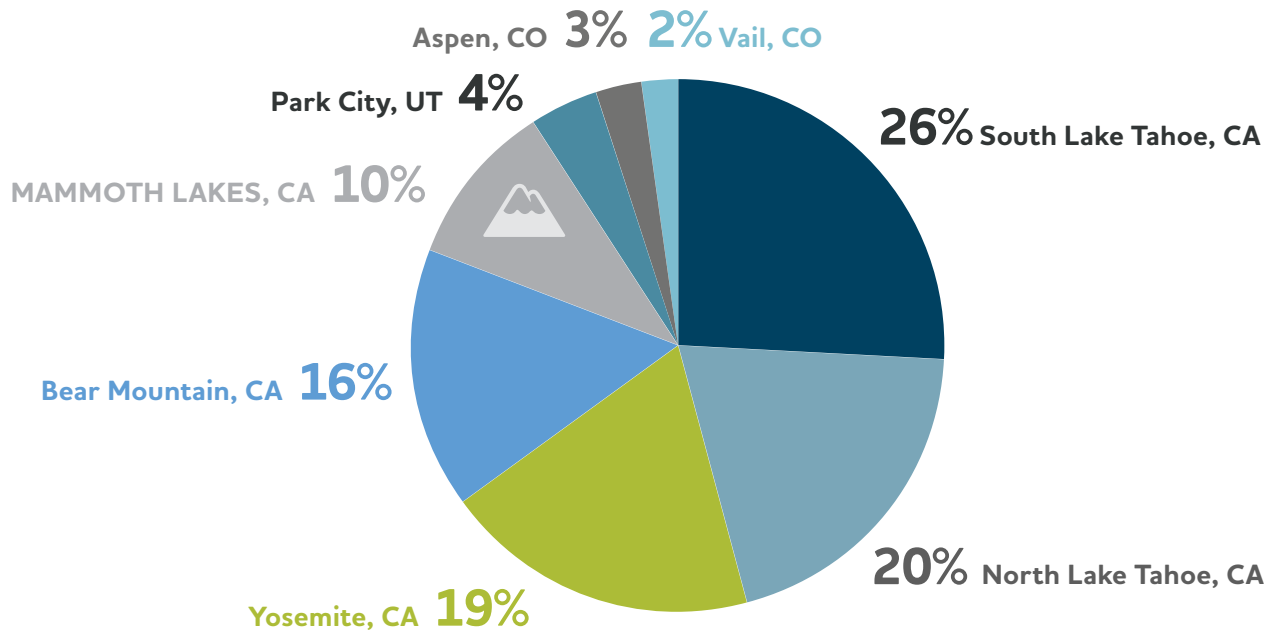
ADVANTAGES & OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> • Mammoth Lakes is surrounded by 2 million acres of public land, which is the primary tourist attraction • The success of tourism, particularly in winter, relies heavily on snowfall, but that is evolving as summer tourism numbers are on the rise 	<ul style="list-style-type: none"> • Many factors threaten access to public lands <ul style="list-style-type: none"> - Changes in legislation, lawsuits, reduction in budgets for public lands, government closures, efforts by special interest groups • Although summer and shoulder seasons are beginning to support more of the economic growth, these seasons may also be vulnerable to issues <ul style="list-style-type: none"> - Wildfires, lack of water in lakes and streams • Mammoth Lakes' extreme mountain environment threatens consistency in air service <ul style="list-style-type: none"> - Flights are often canceled or delayed due to wind and weather

OPPORTUNITY

Budgets have increased and marketing efforts now support promotion of Mammoth Lakes as a year-round destination. Awareness of the destination is increasing, and monthly revenue is increasing toward the goal of \$1 million per month for 10 months of the year.

Competition

Our visitors have indicated that our competitors are primarily mountain and ski destinations. The following graph shows market share.



Source: SMARI Visitor Profile Research, May 2016

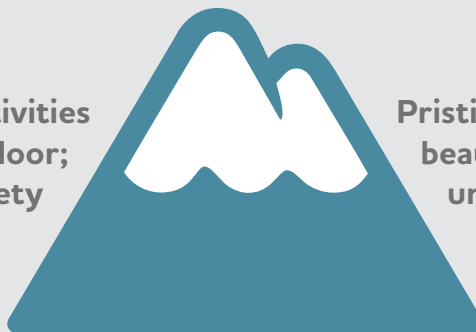
MAMMOTH LAKES' NICHE

Research among visitors and local residents revealed how Mammoth Lakes sets itself apart from its competitors.

Year-round destination

Abundance of activities right outside your door; unique in variety

Pristine natural beauty, serenity; unique environment



An authentic, rugged destination; unpretentious, small-town feel

Source: Mammoth Lakes Exploratory Brand Research, August 2013

Standing Out From the Competition — Mammoth Lakes Tourism Brand

Mammoth Lakes offers visitors the ultimate outdoor destination: a place of active adventure and balance as well as serenity. Brand themes show Mammoth Lakes to be an **authentic destination**, a **natural playground**, a place that is **unique** and that possesses **pristine natural beauty**.

Primary research (SMARI 2016) shows the idea of **exploring and adventure**, **enhancing one's perspective through unique experiences** and **enriching one's understanding of the world** are strong motivators for visiting Mammoth Lakes.

Respondents to the tracking survey claim that the Mammoth Lakes experience performs well on measures such as “gives me time out to think and regain control of my life, allows me to feel organized, provides me a sense of exhilaration, allows me to feel special and spoil myself, and allows me to enjoy special moments with loved ones.” Furthermore, the feeling/benefit of **awe**, inherent in our brand and articulated in the creative strategy as an emotional benefit, has a direct correlation to this and the other trends mentioned earlier.

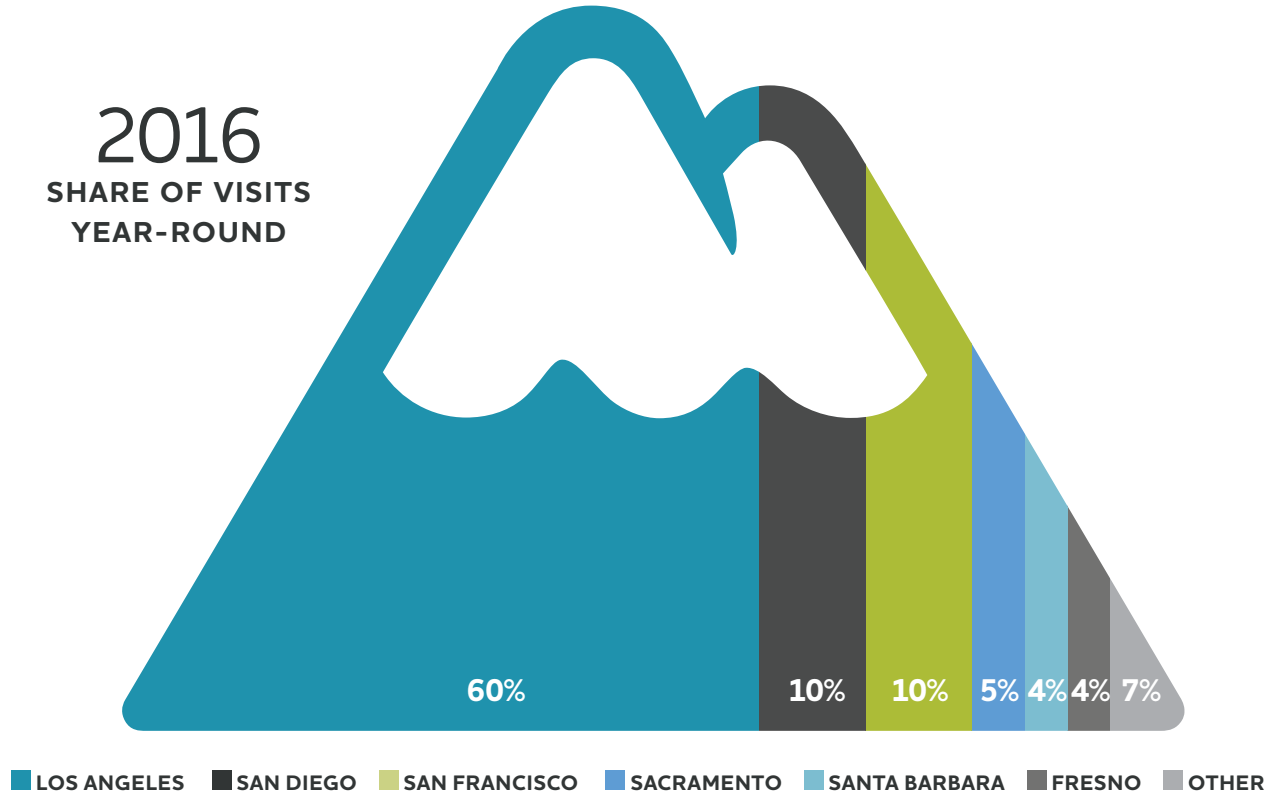
Moving forward, Mammoth Lakes is well-positioned to provide just the experiences today's travelers desire. Messaging and media tactics will continue to leverage these trends.

Drawing on cultural and travel trends, as well as the findings from the Mammoth Lakes tracking surveys, we have refined the benefits (creative strategy) to take advantage of two emotional themes that support the brand duality and appeal to both active and passive visitor audiences.

PASSIVE	ACTIVE
<p data-bbox="428 1524 571 1579">AWE</p> <p data-bbox="240 1612 763 1724">The feeling of being in the presence of something vast, larger than oneself, sublime; reverence mixed with wonder</p>	<p data-bbox="894 1524 1346 1579">EXHILARATION</p> <p data-bbox="902 1612 1341 1724">The quality of feeling overwhelming happiness; elated; enlivened & full of energy</p>

Mammoth Lakes Visitors

The majority of Mammoth Lakes visitors come from the Los Angeles market area.



	WINTER	SUMMER	FALL
Average nights	3.1	3.3	2.6
Party size	4.4	4	3.9
Spending per day	\$481	\$287	\$409
Total trip spending	\$1,492	\$905	\$1,065

Source: SMARI Visitor Profile Research, May 2016

Mammoth Lakes Visitor Trip Planning & Motivation

Based on the August 2016 tracking research, which examined measures related to trip planning and motivation, visitors planned a vacation with a certain type of vacation in mind and with a desired experience in mind. The research also revealed how the advertising impacted visitors' views of Mammoth Lakes.

37% of visitors plan a trip to Mammoth Lakes with certain activities in mind

Top 3 mentions when asked what activities drove their Mammoth Lakes trip planning:

- **Skiing (41%)**
- **Snowboarding (38%)**
- **Unique geological formations (34%)**

30% of visitors plan their trip with Mammoth Lakes in mind

When asked why they had Mammoth Lakes in mind when planning the trip, it was the destination's year-round outdoor experiences all in one place that was most commonly cited.

The top 3 mentions when asked what is most appealing about Mammoth Lakes were:

- **Authentic mountain experience**
- **A good place to indulge in a passion for the great outdoors**
- **Awesome natural beauty**



Mammoth Lakes visitors have a “certain type of vacation” in mind.

ENHANCING PERSPECTIVE

- Provides me with unique/interesting experience
- Broadens my knowledge & enriches my understanding of the world

NOVELTY + EXCITEMENT

- Gives me a sense of exhilaration
- Challenges me to try something new

PRESTIGE + LUXURY

- Provides me with enviable experiences
- Allows me to feel special & spoil myself

RELATIONSHIPS

- Allows me to enjoy special moments with loved ones
- Allows me to strengthen relationships with those close to me

This same group of travelers cite that Mammoth Lakes outperforms on their desired experience in the following categories:

IMMERSION

- Allows me to immerse myself in local life & culture
- Helps me to meet new people & create memories

NOVELTY + EXCITEMENT

- Gives me a sense of exhilaration
- Challenges me to try something new

PRESTIGE + LUXURY

- Gives me time out to think & regain control of my life
- Allows me to feel organized

Finally, the same measures were used to better understand how Mammoth Lakes Tourism's ad campaign impacted travelers' views of Mammoth Lakes (not just past visitors).

LIBERATION

- Helps me live life to the fullest
- Allows me to let go & feel completely carefree

NOVELTY + EXCITEMENT

- Gives me a sense of exhilaration
- Challenges me to try something new

ENHANCING PERSPECTIVE

- Provides me with unique/interesting experiences
- Broadens my knowledge & enriches my understanding of the world

RELATIONSHIPS

- Allows me to enjoy special moments with loved ones
- Allows me to strengthen relationships with those close to me

Source: SMARI 2016-17 Awareness and ROI Survey, October 2017

BUSINESS OVERVIEW



STRATEGIC PRIORITIES

The strategies outlined below will guide marketing activities for Paid, Owned and Earned efforts.

In addition to supporting brand messaging, Owned channels and socially driven content connects with Influencers, who will share with their respective audiences and extend the reach of the marketing program. Owned and Earned channels will also engage audiences not specifically targeted by Paid programs. Together, all will support Mammoth Lakes Tourism brand messaging and also support urgent communications needs.

How Will Mammoth Lakes Tourism Source Its Growth?

<p>REFINE BRAND POSITIONING & CREATIVE STRATEGY</p>	<p>EXPAND & PRIORITIZE TARGETS BY SEASON</p>	<p>ADDRESS SEASONAL OPPORTUNITIES FOR GROWTH</p>						
<p>The brand platform and creative strategy leverage the emotional benefits that result from moments of awe and exhilaration. They also elevate the benefit beyond scenic beauty and “lots to see and do,” as well as support the appeal that can be found in both passive and active moments.</p>	<p>The target segments were identified to leverage the propensity of different travelers to visit Mammoth Lakes based on seasons, activities and vacation motivations – the type of experience they desire.</p>	<p>The seasonal strategy has been proven to produce strong results. Investment will be allocated to:</p> <table border="0"> <tbody> <tr> <td>Summer</td> <td>41%</td> </tr> <tr> <td>Winter</td> <td>33%</td> </tr> <tr> <td>Fall</td> <td>26%</td> </tr> </tbody> </table>	Summer	41%	Winter	33%	Fall	26%
Summer	41%							
Winter	33%							
Fall	26%							
<p>CONTINUE TO BUILD VISITATION FROM KEY FEEDER MARKETS</p>	<p>DRIVE MIDWEEK VISITATION, PARTICULARLY IN WINTER</p>	<p>HOLISTIC PLAN FOR CONTENT DISTRIBUTION</p>						
<p>Investment in key opportunity markets – Los Angeles, San Diego and San Francisco – has boosted the percent of visits, and there continues to be opportunity to grow with more visitors as we promote across seasons.</p>	<p>Occupancy data shows Monday through Thursday occupancy in July, August, September and October is up year over year. Specific messages will target midweek, and we will leverage airline partnerships/ midweek flights.</p>	<ul style="list-style-type: none"> • Use an integrated framework for content distribution. • Use video distribution to support 360° video and experiential aspects. 						

Brand Platform

The brand platform leverages emotional benefits that result from moments of awe and exhilaration.

Mammoth Lakes owns

mother nature's ADVENTURELAND

DEFINITION	MOTHER NATURE: Nature personified as a creative and controlling force. ADVENTURELAND/PLAYGROUND: A place or region particularly popular for recreation or holiday; a sphere of activity.
POINT OF DIFFERENCE	Abundance of year-round activities right outside your door.
EMOTIONAL BENEFIT	A place where (no matter what you do and see) there's an extraordinary sense of awe and feelings of exhilaration.
RATIONAL BENEFIT	An authentic playground for today's outdoor adventures.
REASONS TO BELIEVE	Otherworldly natural landscape; unchanged and raw; remote; great year-round climate; town situated in the middle of a national forest.
PERSONALITY	Dual in nature... humble yet confident, invigorating yet serene, charged yet laid-back, rugged yet modern, approachable yet challenging.

Target Personas

The target personas (segments) were identified through research to leverage the propensity of different travelers to visit Mammoth Lakes based on **seasons**, **activities** (fishing, rock climbing, snowboarding, etc.) and **vacation motivations** – the type of experience they desire in a vacation (enhancing perspective, relationships, novelty and excitement, etc.).

SUMMER	FALL	WINTER
OUTDOOR ACTIVE WITH KIDS	OUTDOOR ACTIVE WITHOUT KIDS	SNOWSPORTER WITH KIDS, SNOWSPORTER WITHOUT KIDS, SNOWBOARDER
Ages 25-54, Household Income \$100K+	Ages 35-64, Household Income \$100K+	Ages 25-54, Household Income \$125K+



Source: MRI 2015 Doublebase



OUTDOOR ACTIVE WITH KIDS

“On our trips together we laugh more than we do at home – not just because we are out of our busy lives, but because we are sharing experiences and bonding.”

WHAT MATTERS?

“My family is everything.”

- Outdoor Actives with Kids value their heritage and stay connected through strong bonds with grandparents and other relatives.

“I work hard and play hard, too.”

- They lead busy lives and value hard work, but between jobs and families, often feel they can't get it all done.
- They strive to keep work-life balance and value free time to have fun and reconnect.

“I want to connect and share.”

- Social media helps keep them up-to-date and share family fun with others.
- They are on their mobile devices for hours and use them as a source of entertainment.

WHAT MOTIVATES?

“I love bringing the family together.”

- Outdoor Actives with Kids are busy on vacation – having fun together, creating unique experiences and bonding through lifelong memories.

“I seek authentic adventures.”

- They feel that a vacation is for doing, playing, seeing and learning. They want their children to experience the wonderful outdoors, get out and explore new things. Their best vacations have a lot of physical activity.

“I grew up loving the outdoors and I want to give that to my children.”

- They don't want their kids to grow up never having caught a fish, gathered pine cones, swam in a lake, hiked a mountain trail, caught a lizard or watched the stars at night.



OUTDOOR ACTIVE WITHOUT KIDS

“I really enjoy getting outdoors in the fall and enjoying that beautiful display of colors that Mother Nature puts on for us.”

“My best day: taking a long hike with my friends, then enjoying an outdoor concert and a beer at night.”

WHAT MATTERS?

“I get the most out of life.”

- Outdoor Actives without Kids have one motto for life – to have as much fun as possible. They have now “made it” and now is the time to really live.

“I am seriously environmentally conscious.”

- They are strongly invested in protecting the environment and seek out companies that have strong environmental records.

“I let friends know about my experiences.”

- They love to post experiences, show friends where they have been and inform them of their latest discovery.

WHAT MOTIVATES?

“I seek unique experiences and like to try new things.”

- Outdoor Actives without Kids like to learn about new things and live life full of variety and discovery. They make return trips to favorite destinations and try new experiences, so outdoor adventure serves as the perfect backdrop.

“I’m the one that brings friends together.”

- They see friends and family as the key to fun. They love playing “host,” planning and engaging travel buddies (including pampered pets) and ushering activities along the way.

“Traveling makes me happier.”

- They believe that taking trips and spending time with friends outside of their daily routine makes them happier in all areas of life. They like to ensure a healthy work/life balance.



SNOWSPORTER WITH KIDS

“Last season, one of my sons asked me why I smile when I ski.
It’s easy: I smile because skiing gives me joy.”

“Riding the lifts with our children gives us an insight into their worlds and their minds.”

“Skiing takes us away from our responsibilities and, even better, from our cell phones.
It’s the perfect six-hour escape.”

WHAT MATTERS?

“I stay involved with the community.”

- Snowsporters with Kids feel that volunteering is an important way to give back and stay connected.

“I work hard to give my children the best I can.”

- They are willing to pay a little more for healthier foods and items that will improve their lives. They enjoy the finer things in life at home and when traveling.

“I want to share.”

- Social media helps them share their thoughts, as their opinion is highly regarded by many.

WHAT MOTIVATES?

“I love to give my family an active, healthy outdoor adventure.”

- Snowsporters with Kids push their families to be active – which is a perfect way to keep a family healthy, happy and together.

“I seek time away to disconnect.”

- They seek time away from work, community projects and children’s busy school schedules. Even though they enjoy an active vacation, it is relaxing and allows them to reconnect as a family.

“I am building my children’s confidence and memories.”

- They grew up skiing with family and want to give their children that same experience – the challenge and the fun. They have fond memories of winter trips and value this tradition.



SNOWSPORTER WITHOUT KIDS

“A day of snowmobiling and skiing with friends – the fresh air, activity and the beauty of the mountains all make me feel so alive.”

WHAT MATTERS?

“I like engaging with friends.”

- Snowsporters without Kids value friendships and prioritize their time to entertain with those friends. They enjoy impressing them with their latest adventures.

“I am environmentally conscious.”

- They are invested in protecting the environment and have a soft spot for animals.

“I let my friends know about my experiences.”

- They love to share experiences and accomplishments with friends, informing them of their latest discovery and sharing healthy lifestyle and fitness knowledge with others.

WHAT MOTIVATES?

“I live a healthy lifestyle and get excitement from a challenge.”

- Physical activity and fitness is key to Snowsporters without Kids. They enjoy winter sports and risk-taking is exciting to them. Outdoor adventure serves as the perfect backdrop.

“I seek authentic adventure.”

- In addition to snow sport adventure, they seek other types of experiences and discoveries, such as new beer, wine, music or a new hobby or accomplishment.

“I’m the one that brings friends together.”

- They see entertaining as the key to fun. They love playing “host” to a spouse or group of friends.



SNOWBOARDER

“Challenge yourself, try new things and share incredible experiences with your friends.”

WHAT MATTERS?

“My friends are everything to me.”

- Snowboarders consider friends to be the most important thing in life and enjoy being the center of attention in a crowd.

“I know where to find the best deals.”

- They are constantly seeking out the best deals and often have the inside scoop on where to find them through friends and social media.

“I am totally connected.”

- They rely on their devices, especially mobile, for hours and hours of entertainment. They are always socially connected, accessible and love to keep up-to-date on anything and everything.

WHAT MOTIVATES?

“I seek out adventure that tests my limits.”

- Snowboarders are likely to think that the best vacation is a physical experience that tests their limits. They are big risk-takers. At the same time, they like to hang out, hit the bar/pub or see a concert with friends.

“I’m into finding the latest and greatest.”

- They are into finding the next popular craft beer, gear or tech device to make their travel a premium experience. They love to pass these finds onto their friends.



EXTREME ENTHUSIAST

“Adrenaline makes me feel alive.”

“I just finished a climb. I pushed myself to redefine my limit and the view from the top was incredible.”

“What’s stopping you? Get out there and do it.”

WHAT MATTERS?

“I like to stay involved and engaged.”

- Extreme Enthusiasts enjoy pushing limits when it comes to outdoor adventure, and also recognize the importance of preserving the magnificence of our mountains, lakes and forests.

“I thrive on the adrenaline rush.”

- Risk-taking is important to them, and the exhilaration of trying something new makes them feel their best.

“I want to share my experiences.”

- They live an extreme lifestyle that impresses others. They enjoy sharing their healthy and active lifestyle knowledge as well as their latest accomplishments.

WHAT MOTIVATES?

“I seek out adventure and new challenges.”

- Whether it is summer or winter, Extreme Enthusiasts want a vacation that involves an opportunity to test limits, try new physical activities and be one with the environment.

“I want variety in my life.”

- They thrive on having variety and creating unique experiences. Whether it is rafting, backpacking, a new beer, cultural experience or tech device, they delight in the “new.”



TACTICAL OVERVIEW

THE NEW CONSUMER DECISION JOURNEY



Source: Kantar/Millward Brown, 2016

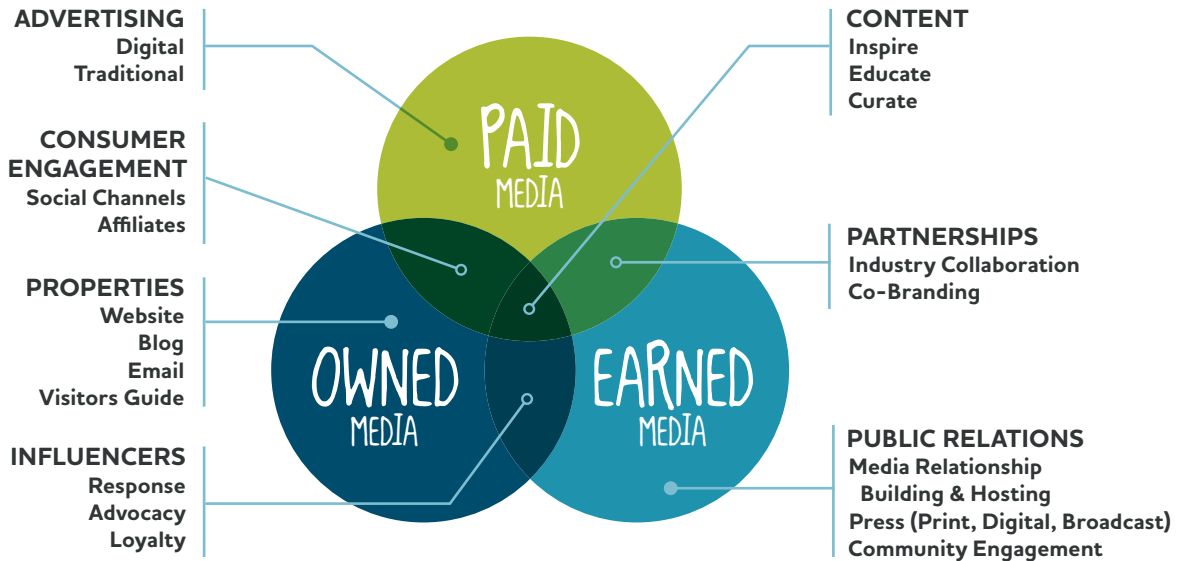
Unlike the traditional, linear funnel, today's consumer decision-making journey is more like a cycle, as shown above. And, consumers will jump around... taking shortcuts at their own discretion.

In order to ensure a consistent, seamless brand presence throughout the consumer journey, the Mammoth Lakes marketing program utilizes a combination of Paid, Owned and Earned media channels, as well as International efforts and Industry Partners. A summary of those approaches are found on the next pages.

2017-2018 CAMPAIGN OVERVIEW

Mammoth Lakes Tourism’s Marketing Plan is intended to create brand distinction, grow consumer engagement and partnerships, and support market development.

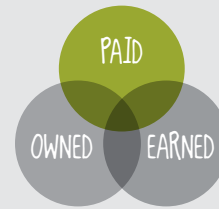
Key Objectives and Strategies



PAID	OWNED	EARNED
<ul style="list-style-type: none"> • Continue to increase top-of-mind awareness of Mammoth Lakes brand in key markets and among the target segments most likely to desire the destination experience • Continue to shift perception as more than a winter destination • Continue to maintain/drive ROI 	<ul style="list-style-type: none"> • Continue to promote and extend Mammoth Lakes brand experience, engage audiences and assist in trip planning • Target audience segments and events not specifically covered by Paid channels 	<ul style="list-style-type: none"> • Promote brand experience, with an emphasis on the Extreme Enthusiast persona • Continue to shift perception as more than a winter destination • Address immediate tactical communication needs
PARTNERSHIPS		
<p>Industry</p> <ul style="list-style-type: none"> • Continue community advocacy efforts • Continue to support local partners and programming • Participate in four consumer trade shows to promote brand awareness and engagement 	<p>International</p> <ul style="list-style-type: none"> • Continue to partner with Brand USA and Visit California on cooperative advertising and Earned media opportunities that promote Mammoth Lakes Tourism on an international scale 	

PAID MEDIA

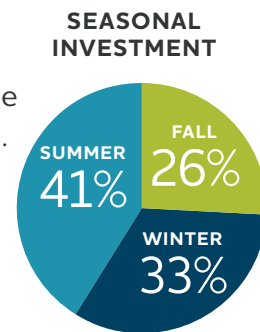
Both campaign analytics and annual tracking studies have indicated that the Paid program is efficient and productive in support of our business objectives and strategies. Thus, the 2017-18 fiscal year has been structured to continue building on prior successes.



Seasonality

In 2016, a third season (fall) was added into the plan. The fall effort made an immediate and positive impact on September and October visitation. To build on that, the 2017-18 fall effort will be extended through the month of September to try and further stimulate October visitation.

Based on the strong ROI in FY 2015-16, Paid efforts will continue a similar seasonal investment strategy, as shown at right.



Campaign Media Mix

The following mix of Paid media channels will be utilized. Industry research shows that branded content is two times more memorable than display ads, so the plan is to increase utilization of video and native content to align with these new media consumption trends.

MEDIA	GEOGRAPHY	PARTNERS OR SOCIAL CHANNELS
VIDEO	California & Nevada	hulu, BrightRoll, CBS, YouTube, NATIVO
NATIVE/ RICH MEDIA/ DISPLAY	California & Nevada; Limited National placements within will be U.S. only	Outside, lonely planet, THRILLIST, NATIVO
SEARCH	California & Nevada	SEM, GDN
SOCIAL	California & Nevada	facebook, Instagram, Snapchat
OUT-OF-HOME	Los Angeles; San Francisco, CA	billups
RADIO	San Francisco/Bay Area listenership	iHeartRADIO
AFFILIATES	National – Influencer’s audience; CA & NV-focused for publisher amplification of Influencer-generated content	InsideOut media, iExplore, TRAVEL MINDSET

Creative Approach

As our research shows, the Mammoth Lakes campaign has grown stronger at influencing travel behaviors, particularly by generating the desire to visit Mammoth Lakes. Again, building on the success of the program, the creative strategy was further refined using insights found in the Mammoth Lakes primary research relative to **Awe** and **Exhilaration**.



Fall

There is now a science associated with the feeling of 'awe' – and the benefits include feelings of restoration and renewal, enhanced perspective and joy. These emotions are inherently in alignment with the more passive fall experience of Mammoth Lakes. Thus, the fall seasonal effort was developed as **'The Season of Awe.'**

Winter & Summer

Winter and summer efforts will focus on the refined strategy that combines the emotions of Awe and Exhilaration in a way that only Mammoth Lakes can. Together, they convey the powerful duality of both wonder and elation through a myriad of experiences that include both passive and active activities. Perhaps the best example of this combination can be found in the new **360° video, '360 Degrees of Adventure.'**

Creative Assets for content marketing include the following:

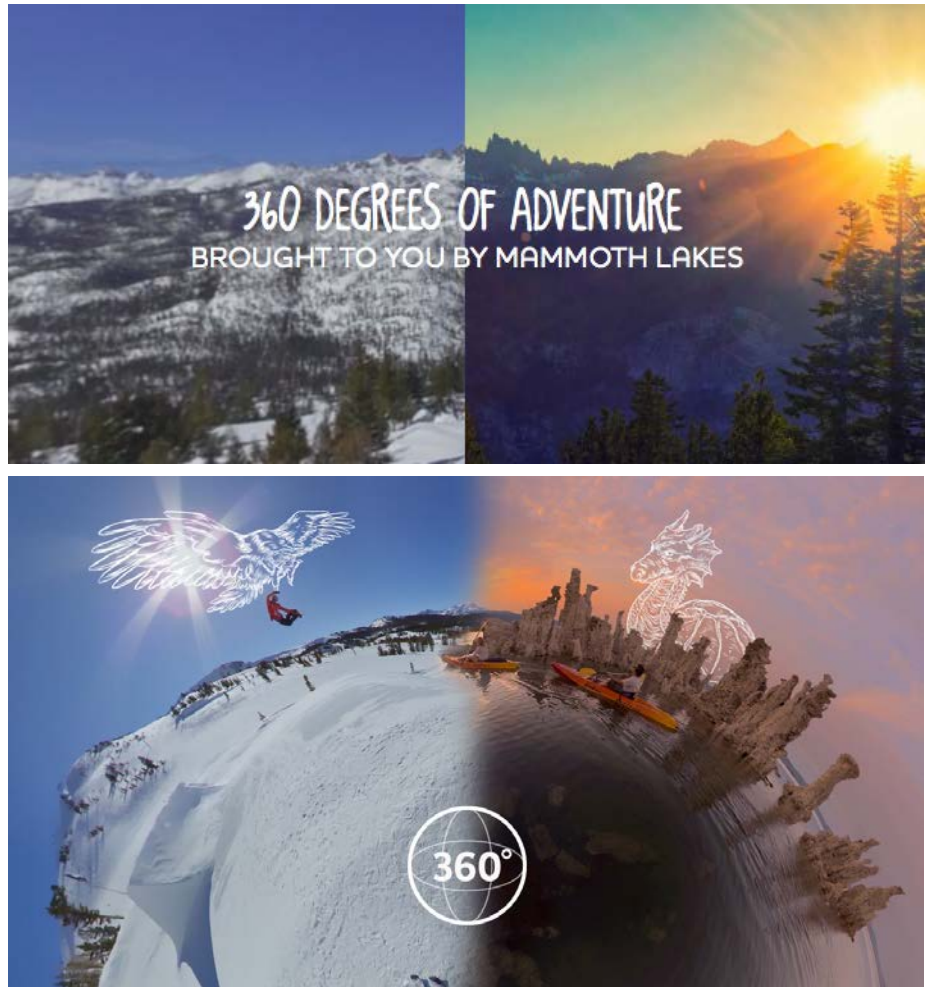
REFRESHED BRAND VIDEO		360° VIDEO	
"Adventure Knows No Season"		"360 Degrees of Adventure"	
"TRUE STORIES OF THE TRULY INCREDIBLE" SERIES			
"Mountain Healing" (Winter)	"Racing The Sun" (Winter)	"Monster Trout" (Summer/Fall)	

Content

360° Video

Storytelling for Mammoth Lakes is taken to a new level with this unique and highly engaging piece of hero content. The story follows a pair of modern adventure travelers from season to season and activity to activity using a 360° interactive perspective.

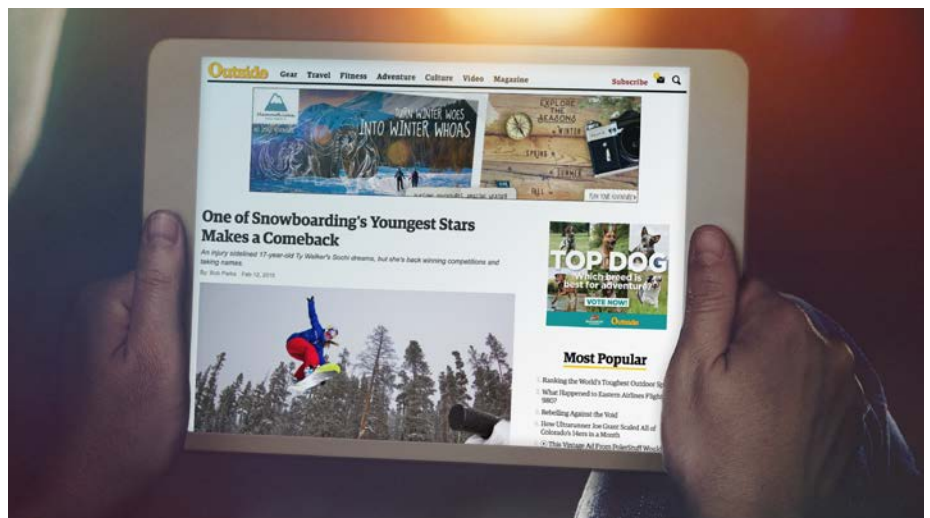
Ultimately edited into three distinct pieces (winter-only, summer-only and all seasons), these assets will be utilized across Paid, Owned and Earned media channels, as well as at trade shows and other applications.



Native

Native content marketing is a marketing technique of creating and distributing valuable, relevant, and consistent content to attract and acquire a clearly defined audience – with the objective of driving engagement and building affinity with the brand through education.

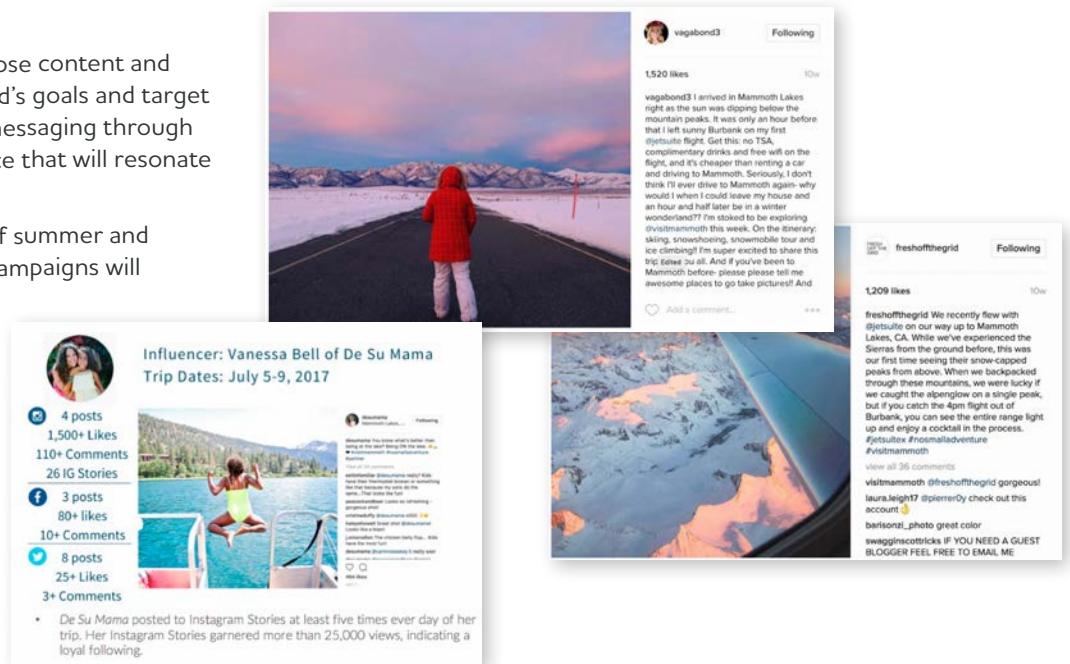
Due to the consumer response to Native advertising, Mammoth Lakes will also be increasing its utilization of the medium, which allows the deeper Mammoth Lakes story to be told.



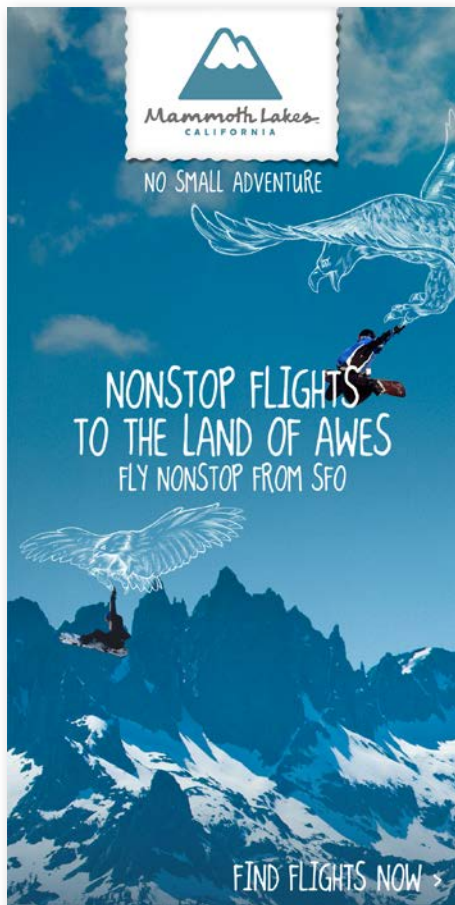
Affiliates

Partner with affiliates whose content and audience aligns with brand’s goals and target communicating brand’s messaging through an authentic credible voice that will resonate with audiences.

During the key seasons of summer and winter, social Influencer campaigns will continue to be a part of the program, helping to generate fresh, unique content as well as amplifying the Mammoth Lakes brand messaging.



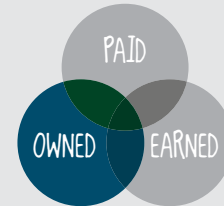
Air Service



OWNED MEDIA

Brand Experience & Fulfillment

Content Matters: In today's marketing landscape, the content housed on our Owned channels is critically important to the overall success of our program.



The Paid and Earned media channels serve as catalysts, driving consumers to the MLT-owned channels where they'll find content that's both authentic and relevant. The Mammoth Lakes website itself is designed to bring the brand experience to life in a meaningful way, using impactful visuals and informative, user-friendly content.

Social Channels

Multiple strategies are deployed through social channels. Paid promotion is used to inspire consumer engagement with the brand. Blog distribution facilitates web conversation and event promotion. And, social channels allow us to engage with loyal Mammoth Lakes visitors.

Blog & Video Content

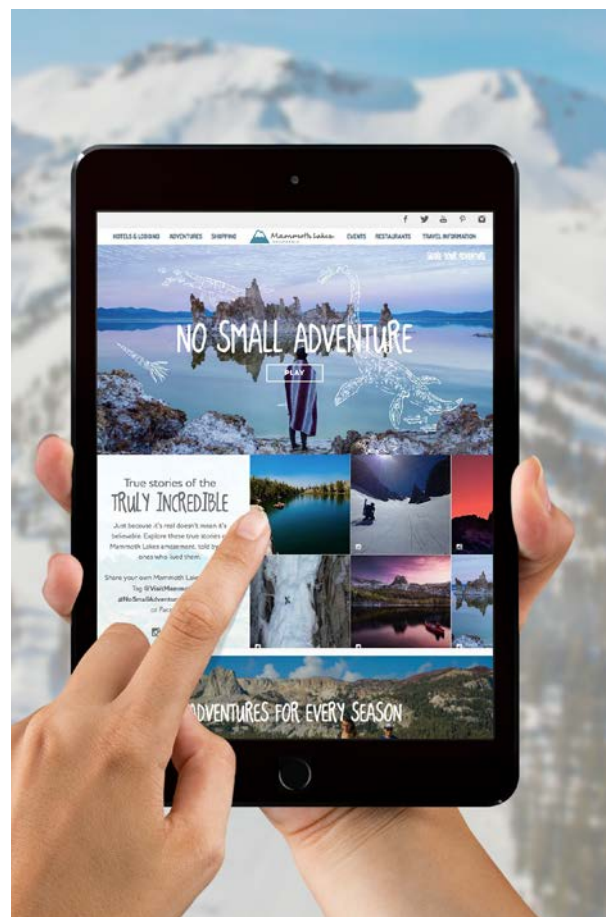
Blog and video content is showcased throughout the website, and reach is enhanced by including distribution through newsletters to engage visitors and pull them into the website. The content is also posted on social channels (as noted above) to encourage further engagement with the Mammoth Lakes brand and website.

Visitors Guide

The official Mammoth Lakes Visitor Guide is the end product for visitors. It is primarily distributed in town for visitors.

Other Printed Materials

- Event and trip planner
- Event promotion posters
- Town maps



EARNED MEDIA

Public Relations

The PR/Communications program has a strong track record for generating Earned media and extending the reach of the Paid advertising.



The PR program is designed to raise awareness of what's new in the region through a number of ongoing tactics, including:

- What's New press releases
- In-market media desk-side visits
- Familiarization tours with members of the media
- Engagement with travel writers, including but not limited to:
 - Society of American Travel Writers
 - Bay Area Travel Writers
 - Outdoor Writers Association of California

FOX26

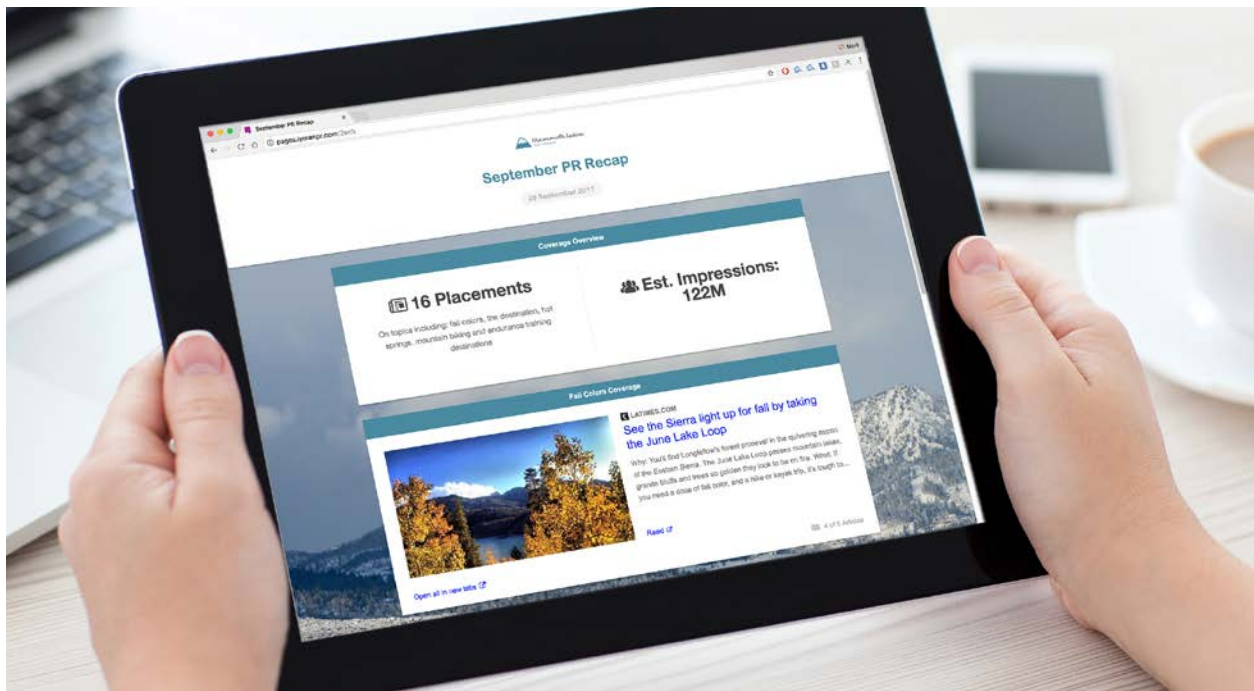
FREESKIER

Los Angeles Times

Sunset

The New York Times

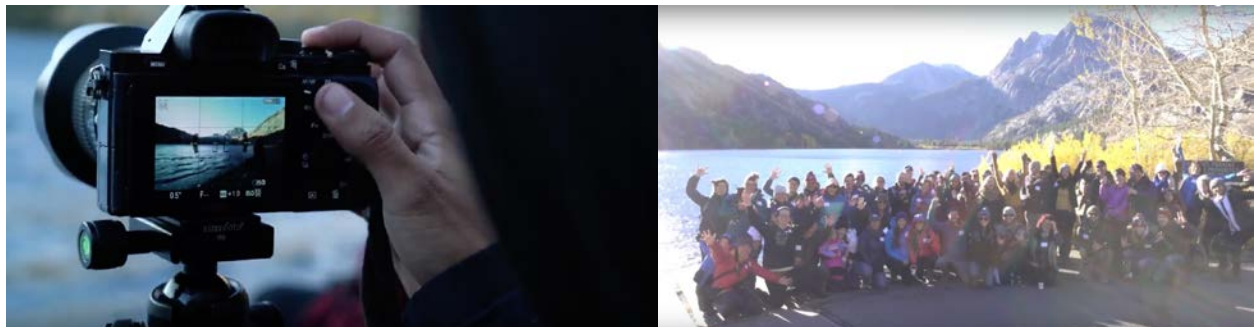
Westways



Efforts to generate Earned media and extend the Paid reach include organic amplification of (Paid) Influencers, coordination and amplification of stories generated by Travel Influencers, and the promotion of **InstaMeets**.

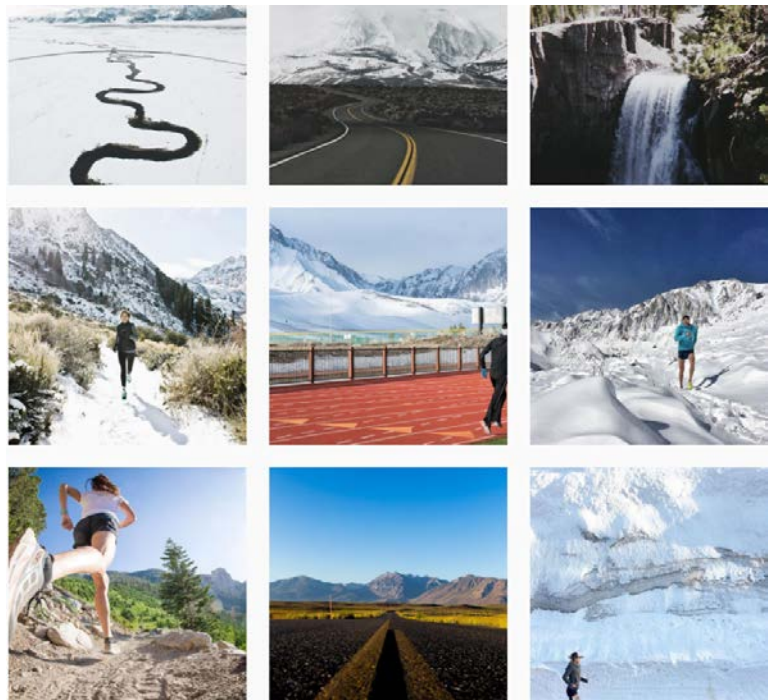
InstaMeets

InstaMeets are an opportunity for Mammoth Lakes enthusiasts to connect and revel in the awe-inspiring beauty of the region, taking photos and videos together for use on Instagram and other social channels. Mammoth Lakes Tourism has an ongoing calendar of InstaMeets throughout the destination.



The Crib (Elite Athletes)

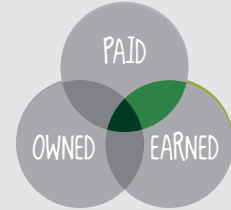
The Crib is a successful strategy for highlighting Mammoth Lakes' leadership position as a destination serving elite athletes doing high-altitude training. Through amplification of this program, other endurance athletes (runners, cyclists and triathletes) can be inspired to visit Mammoth Lakes for their own training.



INDUSTRY PARTNERSHIPS

Industry Partnerships

Comprised of our industry and community partnerships, cooperative promotions, and advocacy.

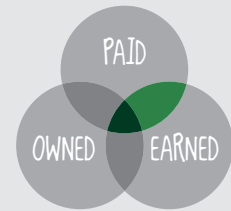


Through diligent collaboration and planning with these partnerships, Mammoth Lakes Tourism extends budget and reach in the regional, national and global travel marketplace. Collectively, these relationships contribute to the increase in brand awareness and travel volume to the Mammoth Lakes region.

PROMOTION PARTNERS	IN-DESTINATION PARTNERS	INDUSTRY TRAINING & ADVOCACY PARTNERS
<ul style="list-style-type: none"> • Brand USA • Visit California • California Welcome Centers • Yosemite Gateway Partners • Mono County Tourism • Bishop Area Chamber of Commerce and Visitors Bureau 	<ul style="list-style-type: none"> • Town of Mammoth Lakes • Mammoth Lakes Chamber of Commerce • Mammoth Lodging Association • Mammoth Mountain Ski Area • Mammoth Lakes Trail System • Mammoth Lakes Recreation • Mono County Tourism 	<ul style="list-style-type: none"> • U.S. Travel • CalTravel • Visit California

International Partnerships

A key benefit of promoting and encouraging international travel to Mammoth Lakes is that international travelers often visit during off-peak seasons when occupancy is lower.



Key strategies used to drive international visitors to the destination include, but are not limited to, use of international promotions (which help to offset fluctuations in the economy), international travel trends (which have taken a step back), and promotional relationships with online travel agents, wholesalers & airline partners.

MEASUREMENT

Research Plan Benchmarks

- Transient occupancy tax (TOT) revenue per month (10 months of viability at \$1 million per month)
- Campaign ROI
- Destination awareness, message communication and destination consideration
- Change in perception of Mammoth Lakes from a seasonal/winter destination to a year-round destination
- Midweek visitation
- Air traffic
- Visa Vue International Expenditure

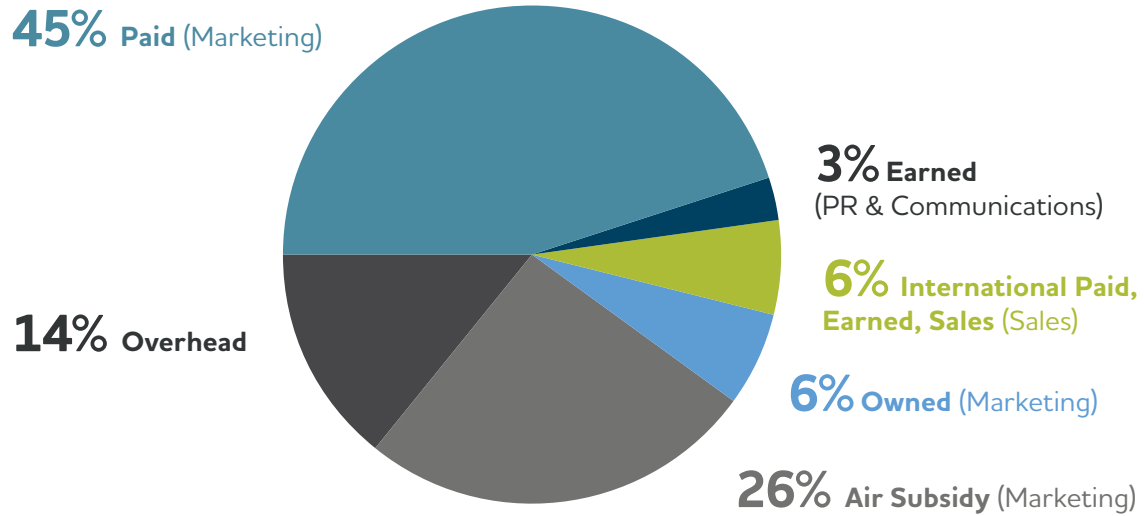
Metrics derived from research results will be conducted on the following schedule:

RESEARCH PROJECT	DATA COLLECTION
FY 16/17 Ad Effectiveness/ROI Research	August 2017
Website ROI Research	Throughout fiscal year
Fall (Ad Effectiveness Research)	October 2017
Winter (Ad Effectiveness Research)	February 2018
Visitor Volume (every two years)	March 2018
Visitor Profile (every two years)	March 2018
Air Service Quantitative Study (every two years)	March 2018



FINANCIALS

FISCAL YEAR 2017-18 MARKETING BUDGET



Paid (Marketing)	\$4,028,186.52
Earned (PR & Communications)	\$271,400.00
International Paid, Earned, Sales (Sales)	\$573,550.00
Owned (Marketing)	\$526,000.56
Air Subsidy (Marketing)	\$2,275,000.00
Overhead	\$1,218,754.00
TOTAL	\$8,892,891.08



Mammoth Lakes[™]
CALIFORNIA