

COVID-19 RECOVERY

MLT DATABASE SURVEY RESULTS

APRIL 2020



Mammoth LakesTM
CALIFORNIA

Agenda

National Findings Overview

MLT Database Travel Sentiment

MLT Database Travel Intent

Survey Demographics

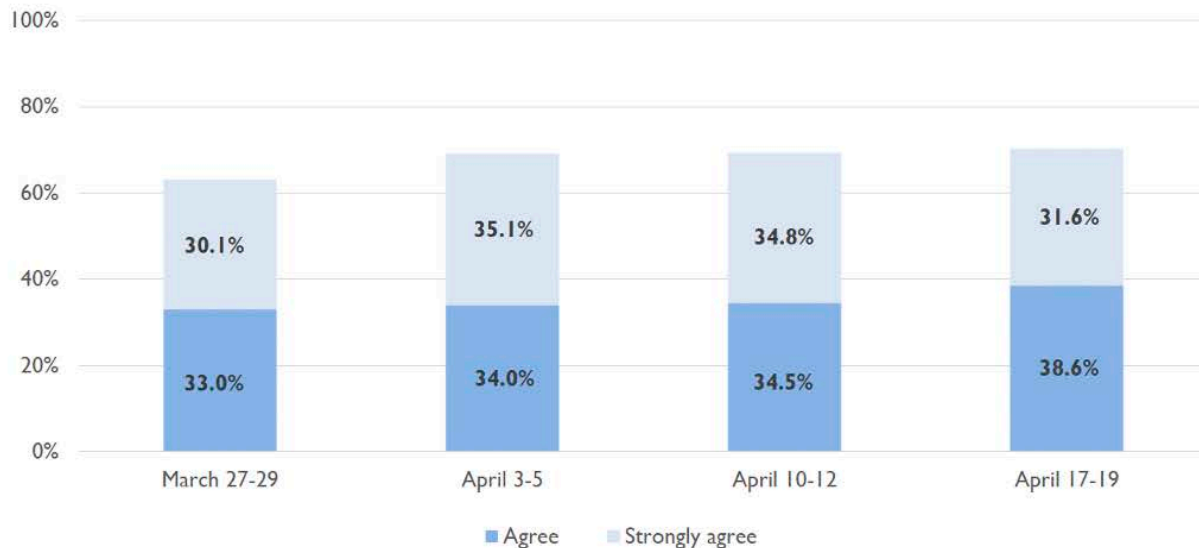
Visitor Estimates (Based on Survey Response Data)



Destination Analysts Topline National Findings

A majority of American travelers, 70.2%, say they miss travel this week--with 38.6% strongly agreeing they do.

Americans Who Miss Traveling and Can't Wait to Get Out and Travel Again



Question: How much do you agree with the following statement?

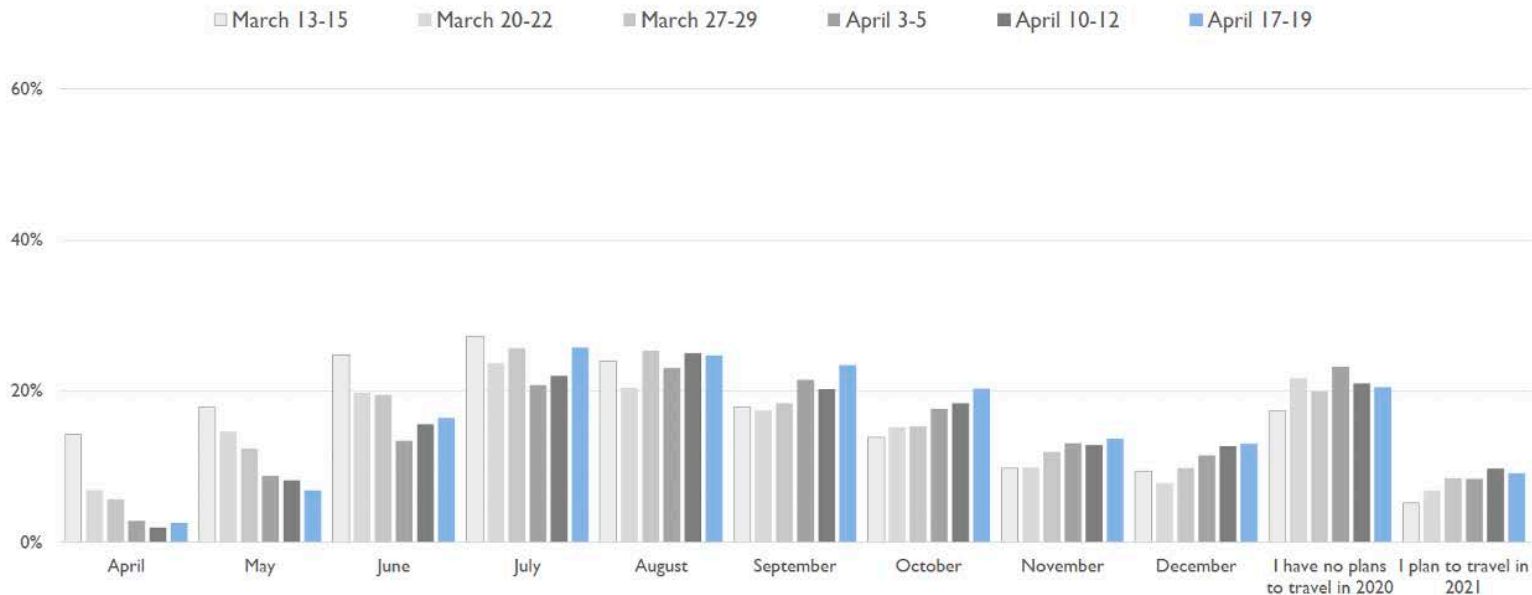
Statement: I miss traveling. I can't wait to get out and travel again.

(Base: Waves 3-6. 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 27-29, April 3-5, 10-12 and 17-19, 2020)

Upcoming Travel Plans



51.2% continue to feel they will be traveling by Fall, with reported increases in travel plans for September and October.



Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

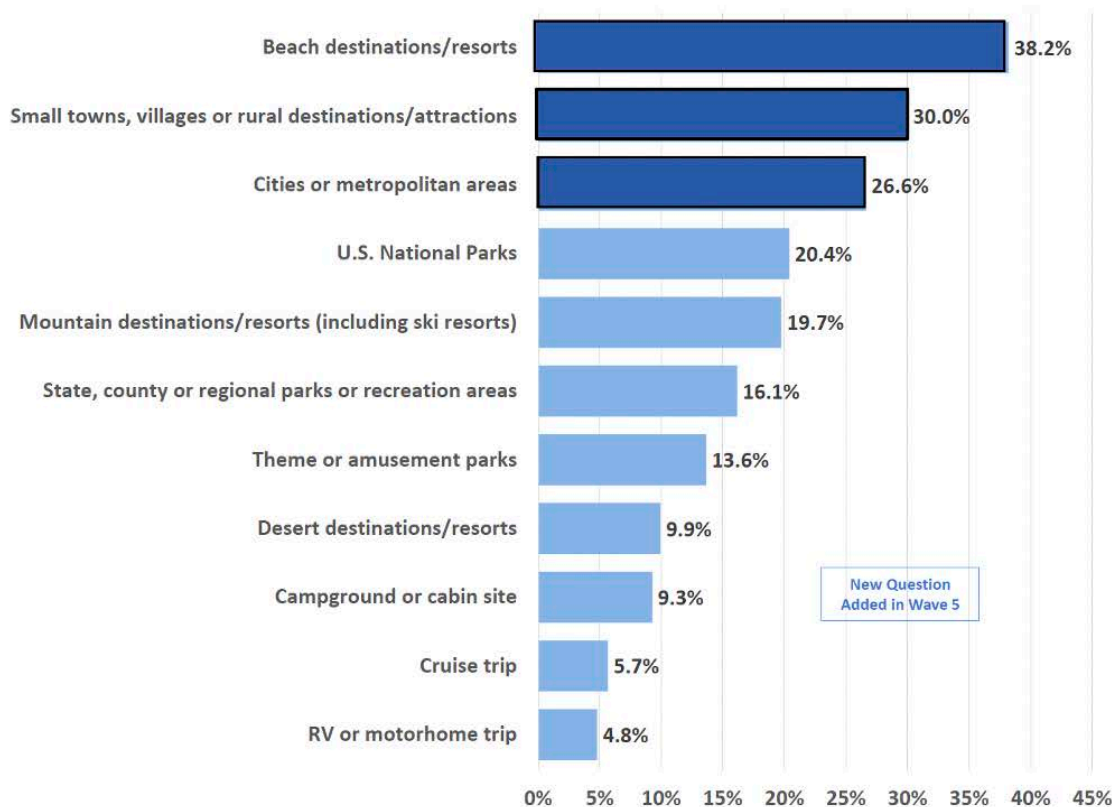
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

First Trip After the Pandemic

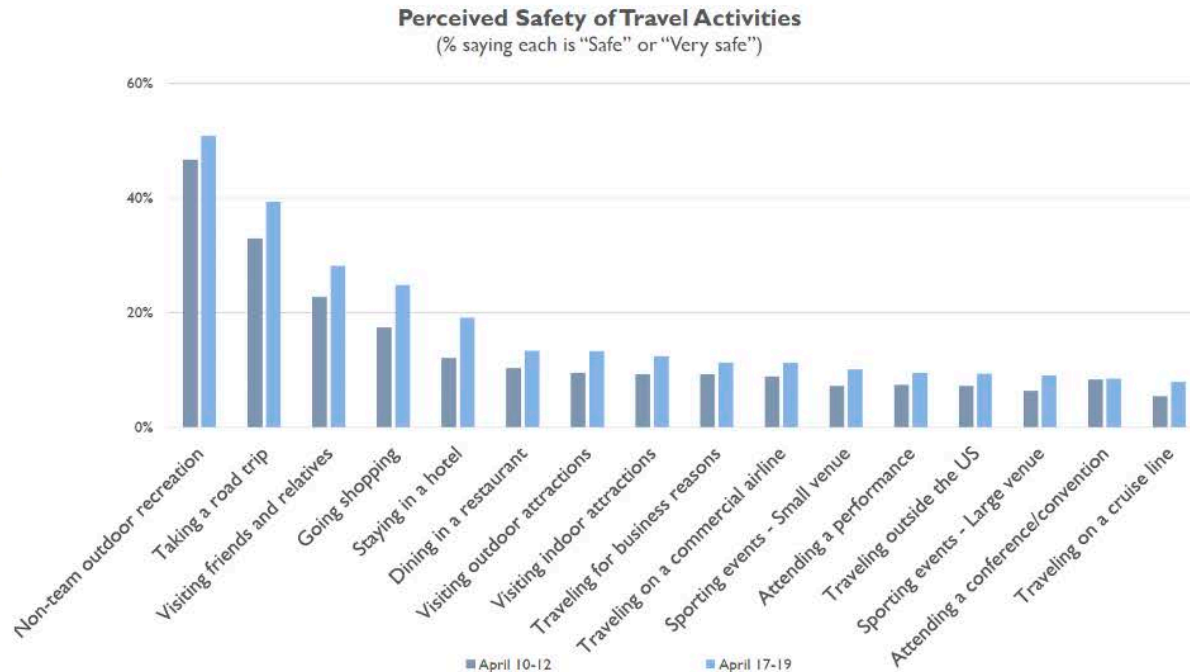
Question: Imagine it is sometime later when you're first begin feeling it is safe to travel again for leisure.

Which best describes the places you will visit on THE FIRST TRIP YOU WILL TAKE?

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



Additionally, the perceived safety of travel activities has improved this week relative to last week.



Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 5-6. 1,263 and 1,238 completed surveys. Data collected April 10-12 and 17-19, 2020)

MLT Database Travel Sentiment



Objectives





- To explore MLT Visitors' current sentiment about travel in general and specifically, travel to Mammoth Lakes
- To gain insight as to when business can expect travel demand to return
- To estimate the level of demand as best as possible (given the limitations of surveying only the MLT database)

Methodology

- Online survey using MLT database
- In-field 4/15-4/16
- Local Mammoth Lakes responses were not included
- Sample size:
 - 1,811 Total
 - 1,246 Visited past year
 - 881 High Intent (planning a trip to ML or definitely visiting in next 12 months)

Start Traveling Again – Post COVID-19



	TOTAL	VISITED ML PAST YR.	HIGH INTENT TO VISIT ML*
	64%	71%	83%
	22%	18%	14%
	7%	7%	4%
	8%	5%	0%

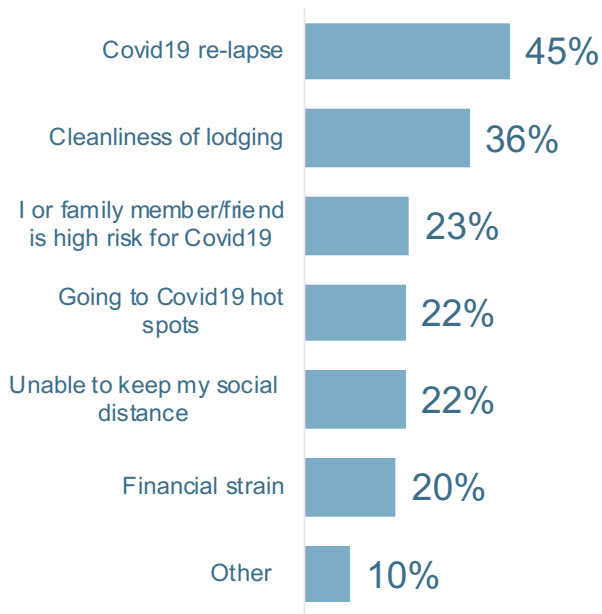
*HIGH INTENT = Already planning a trip to ML or definitely visiting ML.

Looking forward, once things return to relatively normal, when are you likely to START traveling again?

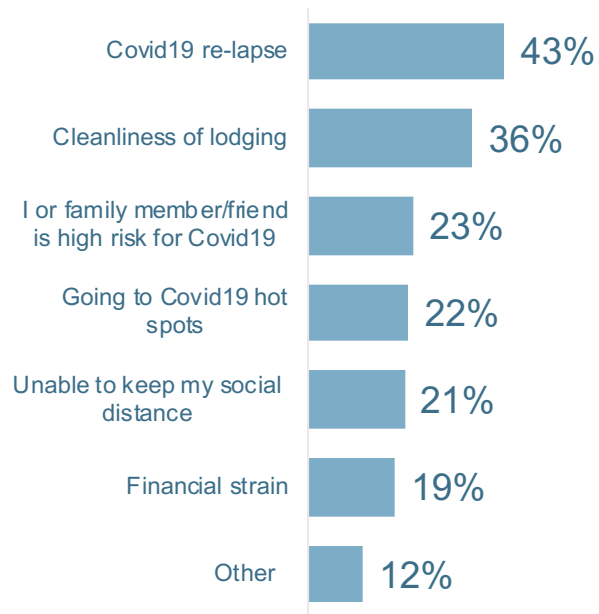
Concerns First Trip – Post COVID-19



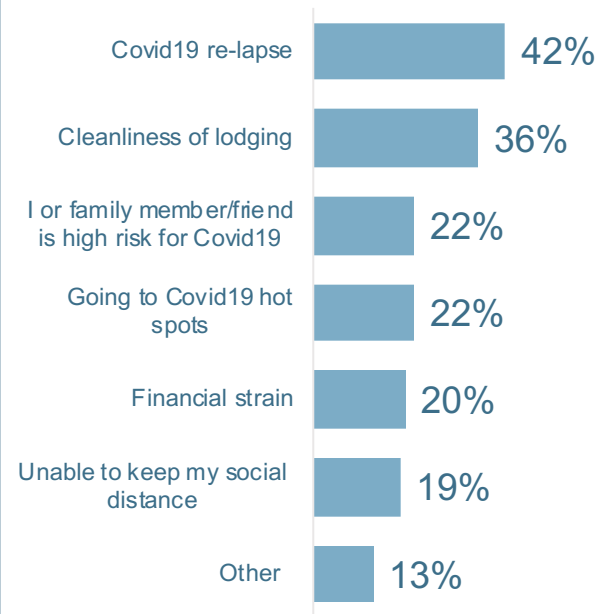
TOTAL



VISITED ML PAST YR.



HIGH INTENT TO VISIT ML



First trip concerns were very similar with all segments.

- The majority said “nothing”, “I have no concerns about travel” and wanted to travel now.
- Many want to know what services, business, trails etc. are open and available.
- “The availability of gas stations, restaurants, tackle shops, markets that provide necessary conveniences.”
- Quite a few mentioned community concerns: “Community resistance to out-of-towners”, “Exposing your community to COVID-19”.
- “Access to healthcare/support” and “Adequate Medical Staff in Mammoth” if something were to happen.

First Trip Type – Post COVID-19



	MOUNTAIN DESTINATION/ RESORT	CAMP-GROUND/ CABIN	BEACH DESTINATION/ RESORT	NATIONAL PARKS	SMALL TOWNS,/ RURAL AREAS	RV OR MOTOR-HOME	CITIES METRO AREAS	THEME AMUSEMENT PARKS	DESERT DESTINATION/ RESORT
TOTAL	42%	12%	10%	9%	8%	7%	2%	0.4%	2%
VISITED ML PAST YR.	47%	13%	9%	7%	6%	7%	1%	0.3%	1%
HIGH INTENT VISIT ML	50%	14%	9%	6%	5%	7%	1%	0%	1%
US TRAVELERS*	20%	9%	38%	20%	30%	5%	26%	14%	10%

OTHER: Visit friends/family, Fishing, International





*US TRAVELERS – Source Destination Analyst Apr 10-12

Post-pandemic, what is the FIRST type of vacation you will take?




Post-Pandemic Used for First Trip: Transportation & Lodging



Type of Accommodation

	TOTAL	VISITED ML PAST YR.	HIGH INTENT	AVG. 2018 PROFILE
 HOTEL/MOTEL	32%	27%	26%	40%
 CAMPGROUND RV PARK	29%	29%	32%	11%
 RENTAL CONDO, HOUSE AIRBNB	29%	32%	32%	29%
 FRIENDS FAMILY	9%	10%	10%	8%

Type of Transportation

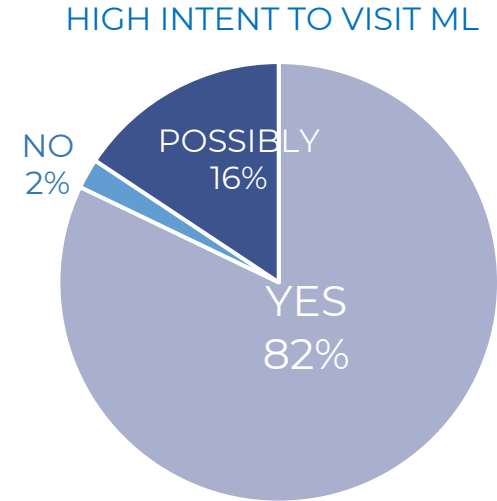
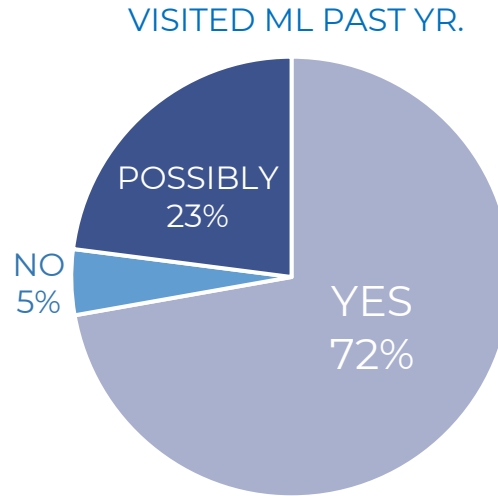
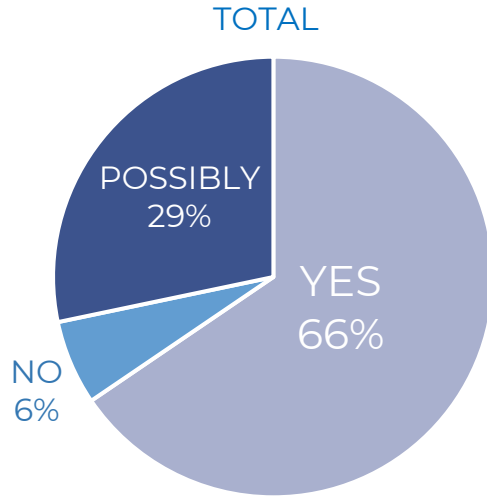
	TOTAL	VISITED ML PAST YR.	HIGH INTENT
	82%	84%	84%
	9%	7%	7%
	8%	8%	8%

Campground/ RV park accommodations have grown significantly in importance from previous visitation.



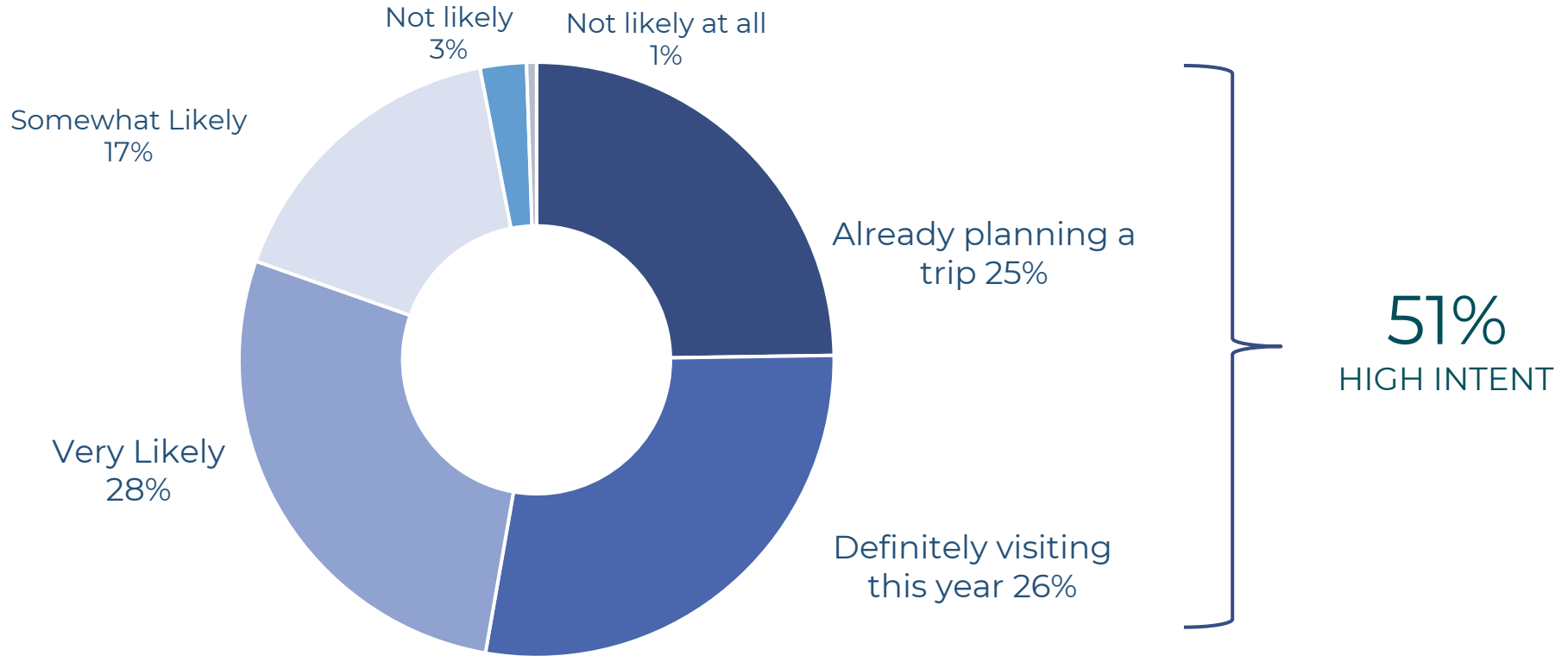
MLT Database Travel Intent

Compared to Other Destinations



At this time, is Mammoth Lakes a more appealing destination, than other destinations you might consider?

Strong Visit Intent Given Current Uncertainty/Knowledge



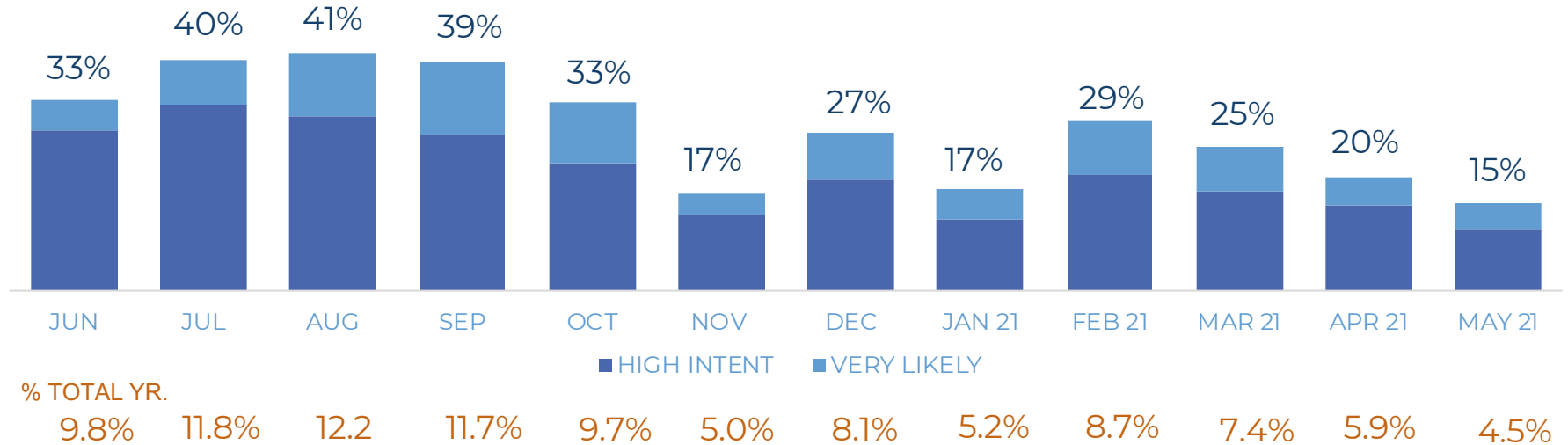
How likely are you to visit Mammoth Lakes in the next 12 months?

Month Intent to Visit



24% of intended visits will be this Summer (July & August), with an additional 26% occurring in Fall (Sep, Oct, Nov)

MONTH INTEND TO VISIT: HIGH INTENT & VERY LIKELY TO VISIT

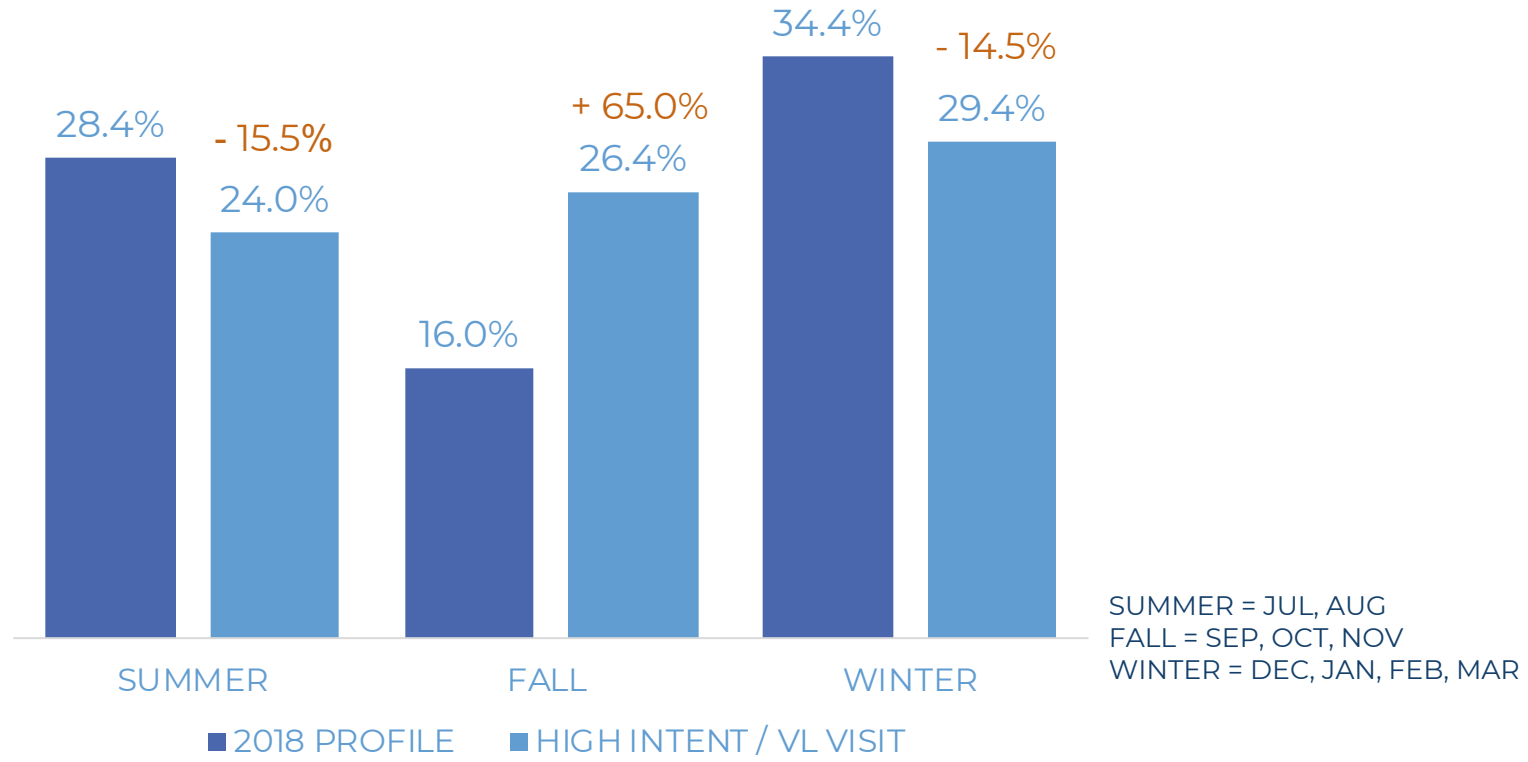


If you visit Mammoth Lakes in the next 12 months, what month(s) would you most likely visit? Please select all that apply for one or multiple trips in the next 12 months.

Visitation Estimate By Season – Directional Only



2018 VISITOR/SEASON vs. 2020 SURVEY INTENT TO VISIT/SEASON



“Is Mammoth going to be open and is it going to be safe?”

Will I Be Safe Visiting Mammoth Lakes?



“Making sure things are organized, clean and procedures are easily identified through visual cues and instructions, so all visitors follow the same expectations for space and cleanliness.”

“Would want to have assurances that the resorts, campgrounds and lodges are taking all the necessary precautions to prevent the spread of COVID-19 in and around their properties.”

“Accurate and always current information about what is open and what is closed, any recommended cautions or advice related to Covid-19 issues in the Mammoth area.”

“What are the measures mammoth will implement to prevent covid19 risks? Will prices go up because of these measures?”

“I’d be more interested in visiting destinations that are proactive on limiting contact amongst other visitors AND provide precautions (i.e. hand sanitizers at high touch surfaces, having staff open doors, etc.)...vacationing includes peace of mind while traveling!”

“I would like some type of guarantee that accommodations have been properly sanitized for the Coronavirus.”

“Will condo rentals agencies be required to deep clean units before renting them out”

“If there’s a plan in place for reopening mammoth lakes and surrounding communities to the general public, address it ASAP so that we may abide by that plan”

“Clarity around Airbnb rentals and how they are cleaned/regulated”

“That businesses provide info that they continue to clean and disinfect, that we see staff practicing Covid-19 hygiene like wearing masks.”

“What precautions will restaurants/shops be taking to help protect the public? Will there be more options for delivery of food and groceries? “

“Would like to hear and see a frequent aggressive disinfectant routine regiment during business hours at all lodges and eating / drinking establishments on the mountain. Have more hand sanitation stations and keep them full. ”

“Ensure biking, hiking, and fishing activities and opportunities are not negatively affected or reduced.”

“How are we going to social distance skiing :(“

“1. That staff are ready and trained to handle visitors, following preventative physical distancing measures for the virus. 2. Having forgiving/flexible cancellation policies if virus returns. (Hotels/motels should make all accommodations completely refundable within one or two-days notice.)”

“When will ski area and campgrounds be open, hotels and restaurants open?”

“Are the trails open? Are the restaurants open? Is the Ansel Adams Wilderness easily accessible?”

“Information on what trails, hotels, restaurants, etc. are doing to assure visitors/people safety of everything w.r.t the virus.”

“Need to know if things will be open (facilities, restaurants, hiking trails, etc.). Need to know that necessities are available (toilet paper, paper towels, food, etc.), need to know what the rules will be (social distancing, etc.).”

Will I Be Welcome?



“Ironic survey after telling people to stay out. Bold move. “

“Last I heard, y'all are asking people not to come from areas that have had coronavirus in their area. I will need to know when that changes and we are welcome again.”

“Seriously, I can't believe you are asking us this after practically threatening to shoot people who visit their mammoth vacation homes. seriously? blocking the 203 unless you are a full-time resident? and now begging people to come back? tone deaf.”

“That vacationers are once again welcome in Mammoth Lakes. We do not want to negatively impact the local people that live there year-round. We heard that places like Lake Tahoe and Mammoth wanted visitors to stay home during the pandemic. We will wait until we get the green light before we make any plans to visit.”

“Locals can be rude and act as if you are a bother.”

“Is Mammoth Lakes safe? Have seen stories where the locals might slash tires or wax windshields to nonlocal visitors!”

“Would not visit Mammoth if there are still COVID cases- wouldn't want to be a possible burden to healthcare there.”

“No. As long as visitors aren't going to strain local medical services for year-round residents and Mammoth Lakes isn't a Covid-19 hot spot, we'll visit this fall.”

“Status of adequate medical staff.”

Availability of medical clinics/ hospitals within 20 miles of Mammoth lakes.”

“My biggest hesitancy - even after things open up again - is that should something happen, I don't think the local hospital is prepared for this. I'd hate to come down with this and be in Mammoth. It's too remote. “

Promotions and Discounts

“If there were very good lodging and lift ticket deals, it would increase the likelihood of a visit this year. “

“Have travel deals, ski trip packages. “

“Extended stay specials, good deals on hotels Mammoths resorts pricing structure makes it difficult to budget for since the ticket and food prices vary depending on day, weekend, holiday etc. “

“Any deals being offered by hotels and when Mammoth Lakes would like to start seeing visitors. Offers of 2 for 1, etc. deals at hotels, restaurants, etc. likely helpful as well. “

“How To” Communications

“Email updates regarding current health related status and condition of the area along with any area closures or restrictions.”

“Post fall color reports.”

“Update visit guide with hotel accommodations and dining listings would be great.”

“No, just keep me updated on Face Book. You’re doing a great job!”

“I appreciate you keeping me up to date via email on the status of the Mammoth Mountain resort.”

“Are you stocking lakes?”

“Open for fishing season?”

“Just keep stocking those lakes and streams with fat trout so we can all enjoy catching them when things get back to normal.”

“As an angler, any details on the trout fishing opportunities is welcome.”

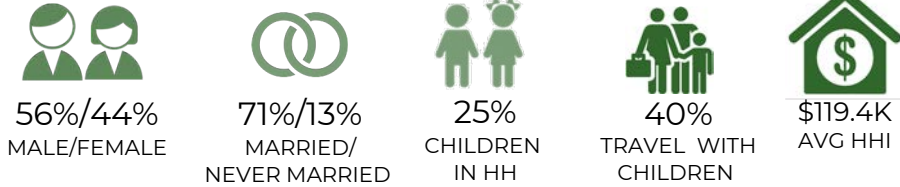
A surreal landscape featuring a brown horse with large, white, feathered wings on the left. A young girl with blonde hair, wearing a purple long-sleeved shirt and light-colored pants, stands on a rocky shore looking up at the horse. The background consists of a large, flat-topped mountain range covered in dense evergreen forests, with a body of water in the foreground. The scene is overlaid with a semi-transparent blue filter.

Survey Demographics

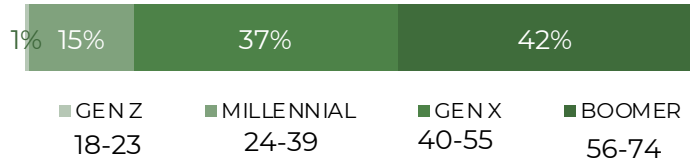
Demographics



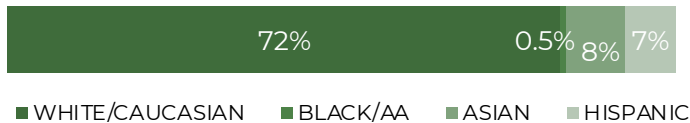
High Intent



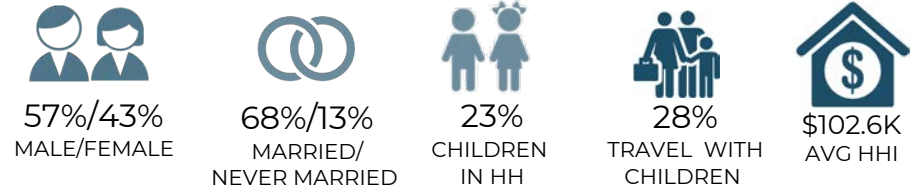
GENERATION



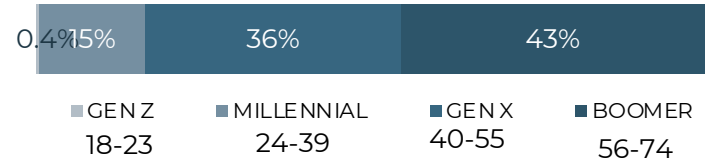
ETHNICITY



Very Likely to Visit




GENERATION



ETHNICITY





Visitor Estimates

(Based on Survey Response Data)

ESTIMATE #1

High Intent & ½ Very Likely to Visit

1,247 VISITED PAST YEAR

881 HIGH INTENT PLAN TO VISIT

231 VERY LIKELY TO VISIT

1,112

1,112 (indicate they will visit) versus 1,247 (visited last year)

-10.8% PREVIOUS YR VISITS

ESTIMATE #2

High Intent Only

1,247 VISITED PAST YEAR

881 HIGH INTENT PLAN TO VISIT

881 (indicate they will visit) versus 1,247 (visited past year)

-29% PREVIOUS YR VISITS

Considerations:

Estimates are calculations based on MLT database responses only and does not reflect a projection of total travelers.



*Mammoth Lakes*TM
CALIFORNIA

Thank you.

- Weekly tracking survey of a representative sample of adult American travelers in each of 4 U.S. regions
- Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom
- Week 6 data (fielded April 17-19)
- 1,200 fully completed surveys were collected each wave
- Confidence interval of +/-2.8%
- Data is weighted to reflect the actual population of each region

Map of U.S. Showing Survey Regions

