Mammoth Lakes Tourism Board Agenda

Wednesday, April 16, 2025, 1:00 p.m.

437 Old Mammoth Road, Suite Z, Mammoth Lakes

Members of the Board

Chair Pat Foster, Vice Chair Eric Clark, Treasurer John Morris, Secretary John Mendel, Board Member John Wentworth, Board Member Tom Parker, Board Member Kirk Wallace, Board Member Cristi Quesada-Costa, Board Member Mary Beth Ericson

NOTE: In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the Town of Mammoth Lakes at (760) 965-3600. Notification 48 hours prior to the meeting will enable the Town to make reasonable arrangements to ensure accessibility to this meeting. (28 CFR 13.102-35.104 ADA Title II)

NOTE: Materials related to an item on this agenda submitted after distribution of the agenda packet are available for public inspection in the Town Offices located at 437 Old Mammoth Road, Suite 230 during normal business hours. Such documents are also available on the Town of Mammoth Lakes website at www.townofmammothlakes.ca.gov subject to staff's ability to post the documents before the meeting.

NOTE: You may attend this meeting in person, or watch it live through the online eSCRIBE system here: https://pub-townofmammothlakes.escribemeetings.com, on the local government cable channel 18, or by utilizing the Zoom link below.

ZOOM INFORMATION FOR MLT BOARD MEETINGS

Join from a PC, Mac, iPad, iPhone, or Android device:
Please click this URL to join. https://monocounty.zoom.us/s/97273142801

Or join by phone:
Dial (for higher quality, dial a number based on your current location):
US: +1 669 900 6833 or +1 346 248 7799 or +1 253 215 8782 or +1 312 626 6799 or +1 646 876 9923 or +1 301 715 8592 Webinar ID: 972 7314 2801 - **Callers: To Raise your hand Press *9, to Unmute/Mute Press *6**
International numbers available: https://monocounty.zoom.us/u/a7NZ1PrU

1. CALL TO ORDER AND ROLL CALL

2. BOARD MEMBER REPORTS

3. PUBLIC COMMENTS

   Public Comments may be sent via email to the Town of Mammoth Lakes Assistant Clerk before or during the meeting at clerk@townofmammothlakes.ca.gov or may be made via Zoom or in person during the meeting in Suite Z. All comments will be limited to a speaking time of three minutes.

4. CONSENT AGENDA

   4.1 Approve the minutes of the Regular Meeting of March 19, 2025

5. POLICY MATTERS

   5.1 Presentation of Resident Sentiment Survey Results - Executive summary of the findings from fall 2024 resident sentiment surveys

   5.2 MLT Draft Deliverables - A review of MLT's deliverables for Fiscal Year 2025-26 with Board discussion and vote to approve

   5.3 Winter Air Service Update - Overview of winter 2024-25 service for both MMH and BIH

   5.4 Financial Reports

   Receive an update regarding the financial health of the Mammoth Lakes Tourism and the results of the previous month for Transient Occupancy Tax (TOT), the Tourism Business Improvement District (TBID) and current account balances

6. DEPARTMENT UPDATES

   6.1 Community Engagement

   Receive an update on community engagement efforts from Vice President, Community Engagement Betsy Truax.

   6.2 International

   Receive an update on international sales and PR efforts from Vice President, Global Tourism, Michael Vanderhurst.

   6.3 Marketing

   Receive an update on marketing efforts from Vice President, Marketing, Sarah Winters.

   6.4 Digital Marketing

   Receive an update regarding digital marketing efforts from Digital Marketing Manager Samantha Lindberg.

   6.5 Local Marketing

   Receive an update regarding local marketing efforts from Local Marketing Manager Emily Bryant.

6.6 Content Marketing

Receive an update regarding content marketing efforts from Content Marketing Manager Laura Wattles.

6.7 Communications and PR

Receive an update regarding communications and PR efforts from Public Relations Manager Ally Watson.

7. OTHER STANDING UPDATES

7.1 Mammoth Resorts Update - Eric Clark

Brief update on Mammoth Mountain news, activity, and operations.

7.2 Mammoth Lakes Chamber of Commerce Update - Tom Parker

Brief update on Mammoth Lakes Chamber of Commerce news, activity, and operations.

7.3 Town Council Update - John Wentworth

Brief update on Town Council news, activity, and operations.

8. ADJOURNMENT

The next regular meeting scheduled for May 21, 2025 will be cancelled and replaced with a special meeting on May 28th due to the Cal Travel Legislative Advocacy Day taking place on the 21st.

Mammoth Lakes Tourism Board

Minutes of Regular Meeting

March 19, 2025, 1:00 p.m.
437 Old Mammoth Road, Suite Z, Mammoth Lakes

Members Present: Chair Pat Foster, Treasurer John Morris, Secretary John Mendel, Board Member John Wentworth, Board Member Tom Parker, Board Member Kirk Wallace, Board Member Cristi Quesada-Costa, Board Member Mary Beth Ericson

Members Absent: Vice Chair Eric Clark

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1. CALL TO ORDER AND ROLL CALL

Chair Pat Foster called the meeting to order at 1:03 p.m**.** in the Council Chambers located at 437 Old Mammoth Road.

2. BOARD MEMBER REPORTS

Treasurer John Morris said that the recent higher snow levels had helped with lodging numbers, and that bookings looked decent through Easter. He announced that the Snowcreek Golf Course would be open this summer and would be run by Sierra Star and that he hoped the course would be open by Memorial Day.

Chair Pat Foster reported that he and Vice President, Community Engagement Betsy Truax had been attending the Town Council meetings to provide updates and would continue to do so. Chair Foster said that he and President and CEO John Urdi had recently attended an Inyo County Board of Supervisors meeting to assist with any questions during an Air Service presentation given by Public

Works Deputy Director, Airports Ashley Helms and Chief Administrative Office Nate Greenberg. He said that he joined the MLT team for the Visit California Outlook Forum. He thanked the team for letting him attend with them, spoke about some of the topics that were discussed, and said that everyone had been experiencing the same tourism related challenges as we were in Mammoth.

Board Member John Wentworth reported that Visit California had published their regional strategies and that they were open for public comment through the end of March.

Board Member Cristi Quesada Costa joined the meeting at 1:14 p.m.

Ms. Quesada Costa reported that Sundays had been busier than usual over the past month and asked if there had been any changes in lodging reservations.

There was discussion between Mr. Urdi and members of the Board.

3. PUBLIC COMMENTS

Town of Mammoth Lakes (TOML) Town Manager Rob Patterson provided an update on the items that were on tonight's Town Council agenda including a detailed look at the Town's budget.

There was discussion between Mr. Patterson, President and CEO John Urdi, and members of the Board.

4. CONSENT AGENDA

Moved by Treasurer John Morris
Seconded by Secretary John Mendel

Approve the Consent Agenda.

For (8): Chair Pat Foster, Treasurer John Morris, Secretary John Mendel, Board Member John Wentworth, Board Member Tom Parker, Board Member Kirk Wallace, Board Member Cristi Quesada-Costa, and Board Member Mary Beth Ericson

Absent (1): Vice Chair Eric Clark

Carried (8 to 0)

4.1 Approve the minutes of the Special Meeting of February 18, 2025.

4.2 Approve the minutes of the Special Meeting of February 19, 2025.

5. POLICY MATTERS

5.1 Presentation from Mammoth Hospital CEO Tom Parker - Brief update on Mammoth Hospital North Wing project

Mammoth Hospital CEO Tom Parker outlined the information in the Mammoth Hospital Presentation.

There was discussion between Mr. Parker and members of the Board.

5.2 MLT Strategy Documents - Review and discussion on MLT's 2025-2027 strategic direction and planning calendar. Board to provide feedback and vote to approve strategic direction.

President and CEO John Urdi outlined the information in the MLT Draft Strategic Plan.

There was discussion between Mr. Urdi and members of the Board.

Moved by Secretary John Mendel
Seconded by Treasurer John Morris

Approve Strategic Direction.

For (8): Chair Pat Foster, Treasurer John Morris, Secretary John Mendel, Board Member John Wentworth, Board Member Tom Parker, Board Member Kirk Wallace, Board Member Cristi Quesada-Costa, and Board Member Mary Beth Ericson

Absent (1): Vice Chair Eric Clark

Carried (8 to 0)

5.3 Bluesapalooza Funding Discussion - Board discussion, consideration, and possible vote on additional funding for Bluesapalooza

Board Member John Wentworth announced that there would be a Ribbon Cutting Ceremony at 3:00 p.m. today at the Innsbruck Apartments.

President and CEO John Urdi spoke about the request MLT had received for additional funding for the Bluesapalooza event.

PUBLIC COMMENT:

Omega Events Inc. President Rich Sherman provided additional information about Bluesapalooza.

Assistant Clerk Angela Plaisted summarized a written comment received via email from Bluesapalooza Nonprofit Organization Coordinator Rich Boccia which discussed the history of event venues in Town and suggested creation of a committee to explore the option of having the Bluesapalooza Festival hosted in partnership with the Town and MLT in 2026 at the Bell Shaped Parcel and that it moved toward the concept of being named Mammoth's Central Park.

There was discussion between Mr. Urdi, Mr. Sherman, and members of the Board.

Moved by Treasurer John Morris
Seconded by Secretary John Mendel

Approve one-time additional funding in the amount of $25k with the understanding that Bluesapalooza would provide MLT a detailed report of how the $25k was spent and also provide a post event report on the Return on Investment (ROI) to the best of their ability figured only Bluesapalooza's ROI.

For (5): Treasurer John Morris, Secretary John Mendel, Board Member Tom Parker, Board Member Kirk Wallace, and Board Member Cristi Quesada-Costa

Against (3): Chair Pat Foster, Board Member John Wentworth, and Board Member Mary Beth Ericson

Absent (1): Vice Chair Eric Clark

Carried (5 to 3)

5.4 Winter Air Service Update - Overview of Winter 2024-25 service for both MMH and BIH

President and CEO John Urdi outlined the information in the Air Service Update.

There was discussion between Mr. Urdi and members of the Board.

5.5 Financial Reports

Receive an update regarding the financial health of the Mammoth Lakes Tourism and the results of the previous month for Transient Occupancy Tax (TOT), the Tourism Business Improvement District (TBID) and current account balances.

President and CEO John Urdi outlined the information in the Financial Reports.

There was discussion between Mr. Urdi and members of the Board.

6. DEPARTMENT UPDATES

A brief recap of past, current, and future efforts of each department.

6.1 Community Engagement

Vice President, Community Engagement Betsy Truax gave an update on recent community engagement activities. Ms. Truax said that she had received a report of the comments from the Resident Sentiment Survey and would present it at the next meeting and possibly at the March 27th Town Council meeting. She announced that this month's Community Coffee speaker would be State Assemblyman David Tangipa and that the last free Community Skate Night would take place on April 2nd. She said that she had been in discussions with Board Member and Mammoth Mountain Ski Area (MMSA) Chief Operating Officer Eric Clark regarding special events venues.

There was discussion between staff and members of the Board.

6.2 International

Vice President, Global Tourism Michael Vanderhurst gave an update on international sales activities. Mr. Vanderhurst reported that MLT had hosted influencers from China and Brazil as well as Familiarization (Fam) groups from Australia and New Zealand and acknowledged Outbound Mammoth for their lodging support for the Fam visit. He said they would host a German Fam visit starting tonight in partnership with Altera and Mammoth Resorts, and said that MLT would be joining the State of California for a large Pan-Euro sales mission.

There was discussion between Mr. Vanderhurst, Urdi and members of the Board.

6.3 Marketing

Vice President Marketing, Sarah Winters gave an update on marketing events and activities. Ms. Winters said that air surveys were continuing at the Bishop and MMH Airports and reported that paid media for special events would push out in April.

6.4 Digital Marketing

Digital Marketing Manager Samantha Lindberg provided an update on digital marketing efforts and social media activity. Ms. Lindberg reported that MLT would create an online Summer Ready Guide this year and that the next video in the "It's a Mammoth Thing" series *Mammoth Tap,* featuring LA Kings Captain Anže Kopitar would launch this week.

There was discussion between Ms. Lindberg and members of the Board.

6.5 Local Marketing

Marketing Manager Emily Bryant gave an update on recent local marketing activities. Ms. Bryant reported that the event funding discussions had been finalized and that twenty-seven events had been funded. She said that more information could be found on MLT's Community Page and thanked the Special Events Committee for their efforts. She also reported that MLT was working with Visit California on a Tourism Exchange program and said details were available on MLT's Community Page.

There was discussion between Ms. Bryant and members of the Board.

6.6 Content Marketing

Board Member John Wentworth left the meeting at 2:56 p.m.

Content Marketing Manager Laura Wattles provided an update on content marketing efforts including the release of the season's first Fishing newsletter in anticipation of the upcoming fishing opener. Ms. Wattles reported that she had worked with the Town to create graphics for the LA Kings Road Trip event partnership and also to create a stewardship program for Dog Ambassadors including dog bandanas for their Host Hounds.

There was discussion between Mr. Wattles and members of the Board.

6.7 Communications and PR

Public Relations Manager Ally Watson provided an update on communications and public relations efforts. Ms. Watson reported that MLT had recently hosted four media visits with journalists from the SF Gate and the Boston Globe with a focus on Mammoth Lakes as a versatile travel designation and said that MLT staff and journalists from SF Gate had toured Housing Now projects with TOML Director of Community and Economic Development Nolan Bobroff.

There was discussion between Ms. Watson and members of the Board.

7. OTHER STANDING UPDATES

7.1 Mammoth Resorts Update - Eric Clark

There was no Mammoth Resorts update given.

7.2 Mammoth Lakes Chamber of Commerce Update - Tom Parker

Board Member Tom Parker gave an update on recent Chamber events and activities. Mr. Parker announced the following upcoming events: Women in Business Speed Mentoring at the Library on March 24th, free sessions for local businesses with Joseph Bogorad providing advice on how to promote their business though social media at the Library on March 26th, Power Lunch discussing smart financial strategies with Colin Fernie and Eric Wasserman, and Business After Hours with Mammoth Hospital CEO Tom Parker providing a presentation on the Hospital's North Wing Project on March 15th at Elevate at Cerro Coso College. He announced that a press release went out yesterday announcing that Chris Benchetler and Kimmy Fasani would be the Grand Marshals of this year’s 4th of July Parade, and recognized President and CEO Brianna Goico and staff for their work putting the parade together. He said this year's parade theme would be Art and Nature to celebrate how art, beauty, and creativity all come together in Mammoth.

There was discussion among members of the Board.

7.3 Town Council Update - John Wentworth

There was no Town Council report given.

President and CEO John Urdi directed members of the Board to page 2 of the Air Service update to show new graphics that were not pointed out during the Item 5.4 discussion.

8. ADJOURNMENT

President and CEO John Urdi reported that he would be out of town for the Cal Travels Advocacy Day on May 21st and said that he would like to move the May meeting from the 21st to the 28th.

There was discussion between Mr. Urdi and members of the Board.

The meeting was adjourned at 3:06 p.m. to the next regular meeting scheduled to be held on April16, 2025.

Angela Plaisted, Assistant Clerk

Future Partners



Mammoth Lakes Tourism 2024 Community Sentiment

Research Overview & Objectives

Mammoth Lakes Tourism (MLT), along with its agency-partner, The Shipyard, seeks to build successful partnerships with residents, business owners, and community groups. To support the achievement of this aim, Future Partners developed a research study to provide critical insights into each of these segments' (residents, business owners, and community groups) sentiment about tourism in Mammoth Lakes. This research supports MLT, the Town of Mammoth Lakes and key community audiences in working together to develop solutions around destination challenges and manage ways for both residents and visitors to harmoniously coexist. This study was initially designed, fielded and reported on in 2023; it was evolved in 2024 to capture current informational needs. The research study's primary objectives are to:

- Understand detailed resident and business owner profiles
- Evaluate key metrics (e.g., likelihood to recommend, etc.) for Mammoth Lakes and Mammoth Lakes Tourism
- Gauge community sentiment towards tourism and the Mammoth Lakes Tourism organization
- Identify strategies for community engagement, support, tourism growth, etc.
- Compare and benchmark to 2023 where relevant



Methodology

This study employed an online survey methodology, with the survey link distributed via a QR code displayed prominently on the MLT Annual Report mailed to all Mammoth Lakes Post Office boxes and featured on posters throughout the community and highlighted at Community Skate Nights. A survey link was also emailed to MLT, Chamber, TOML, and MUSD newsletter subscribers. Some MMSA departments shared the link with their employees, and MLT targeted employees of local businesses and agencies through sponsored social media posts.

The survey was available in English and Spanish. In total, 411 completed surveys were collected between November 2024 through January 2025 and include responses from all key audiences of interest. In comparison, 262 completed surveys were collected in the prior year.

To encourage response, respondents were eligible to enter a sweepstakes to win one (1) $500 Yiftee gift card fulfilled by Mammoth Lakes Tourism.

Future Partners



Outdoor recreation/activities remain the leading benefit to living in Mammoth Lakes according to residents (92%). They also praise the small-town lifestyle (77%), pristine landscape (76%), safety (75%) and weather (72%).

Affordable housing, by far, continues to dominate residents' concerns for the area (78%); the perceived high cost-of-living impacts residents' perception of Mammoth Lakes as a place to live (48%).

Residents enthusiastically embrace the notion of Mammoth Lakes as a great place for a vacation (78%), are moderately but increasingly positive towards it as a place to live (59%), and downplay it as a place to start/open a new business (9%).



Nearly all residents agree that revenues from tourism are important to the vitality of Mammoth Lakes' economy (96%) and are important for funding government services (89%).

Although residents understand the importance of tourism to the town, more than half feel the area hosts more visitors than it can comfortably accommodate (53%), especially at peak times of the year. They commonly cite economic (costs/housing), environmental (respect for the land/wildfire awareness), and lifestyle (trash/rudeness/traffic) pressures.



In terms of weighing the benefits of tourism against the problems the industry is perceived to create, 44% of Mammoth Lakes residents feel that the benefits and problems associated with tourism balance each other out, 36% believe tourism's benefits outweigh problems (a belief that is even stronger amongst business owners), and 19% think tourism's problems outweigh its benefits. The sentiment that tourism's benefits outweigh the issues has improved over the last year amongst both residents (+9 points) and business owners (+6 points).



Nearly all residents claim familiarity with and some knowledge of Mammoth Lakes Tourism (94%), and most agree that its mission statement aligns with their expectations (84%).

While only 31% of residents feel satisfied with the organization's efforts to balance increased tourism with the needs of residents, this is a marked improvement from a year ago (when just 22% agreed). Similarly, there is a growing feeling that MLT listens to resident voices/ideas (36%, +8 points from 2023).

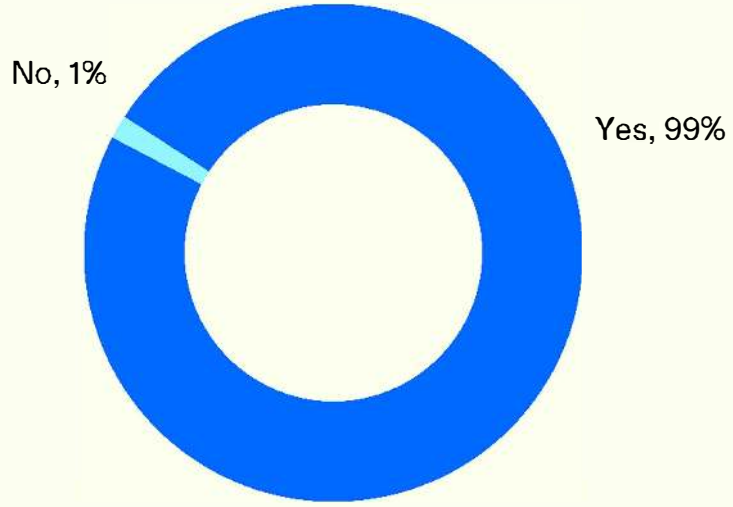
The Real Unreal campaign made gains in residents' awareness, with a majority now aware (57%). Nearly two-thirds of those aware of the campaign agree that it represents Mammoth Lakes in a way residents want to portray to visitors.



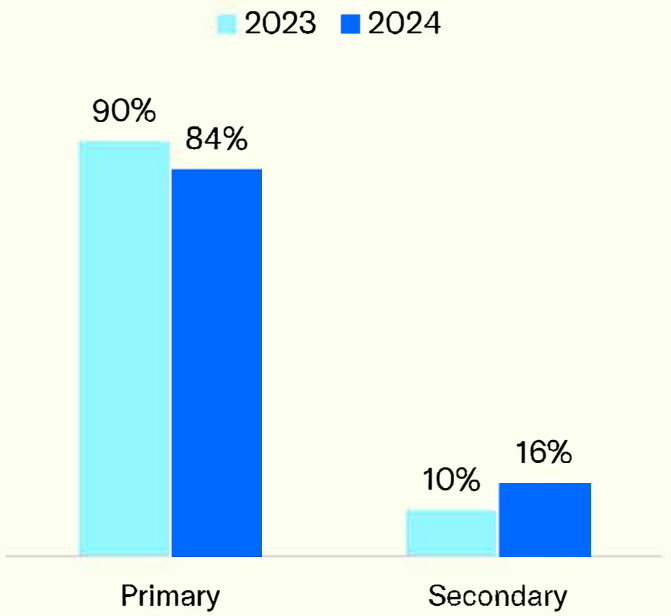
Nearly all of those surveyed live in Mammoth Lakes as their primary residence.

However, a somewhat smaller share considers Mammoth Lakes their primary residence than a year ago (84% from 90%).

Current Residency or Homeownership in Mammoth Lakes



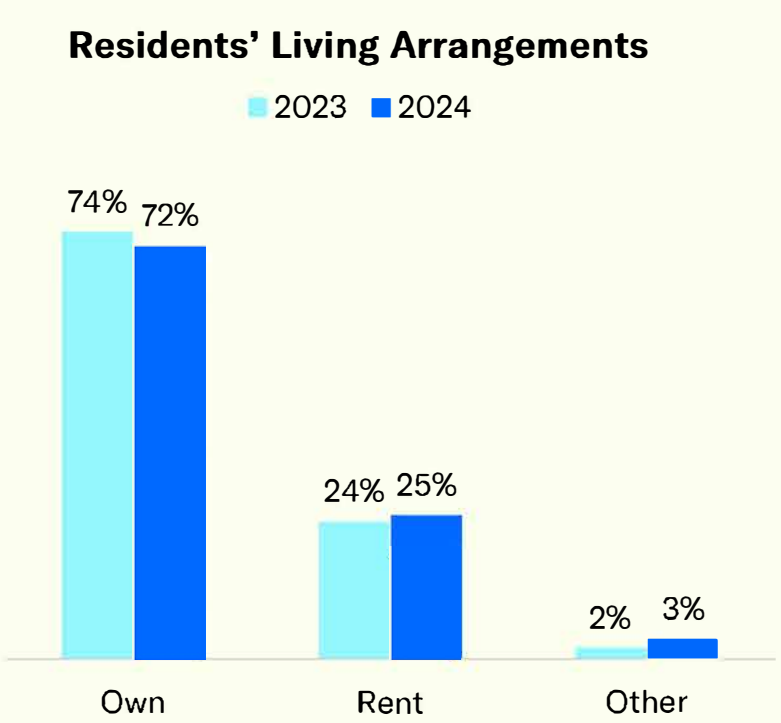
Property Type of Residents

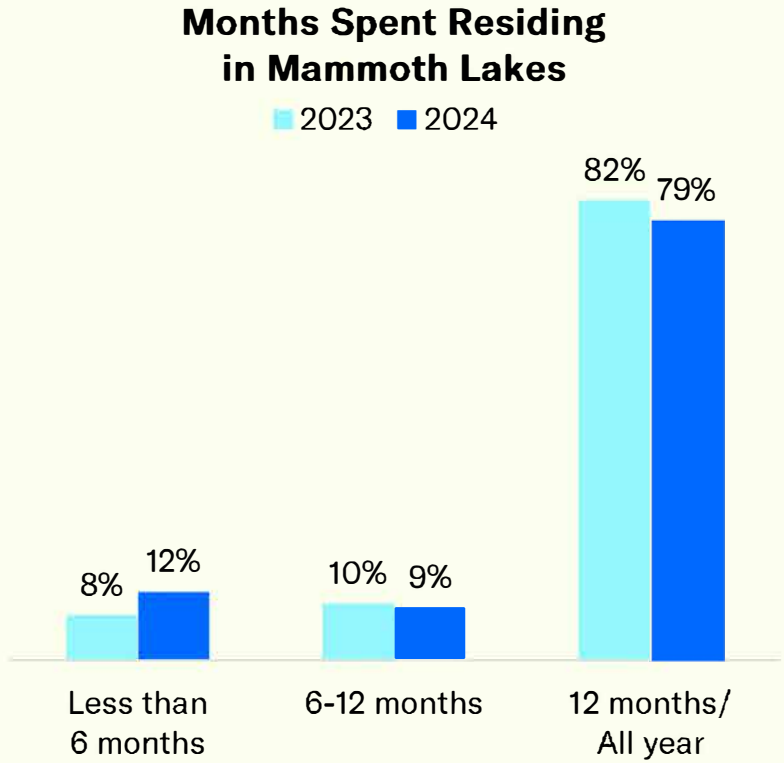


Question: Do you currently live in or own a residence in Mammoth Lakes? | Is Mammoth Lakes your primary residence or a secondary residence?
Base Size: Total Respondents (2023: 258; 2024: 411); Total Residents (2023: 255; 2024: 405).

The vast majority of residents own their home and live in Mammoth Lakes year-round.

Resident living arrangements in 2024 almost mirror 2023, with just slightly fewer owning their residence (72% from 74%) and living there the entire year (79% from 82%). However, part-time residents spend less time than a year ago, with a larger share spending less than six months in the area (12% from 8%).



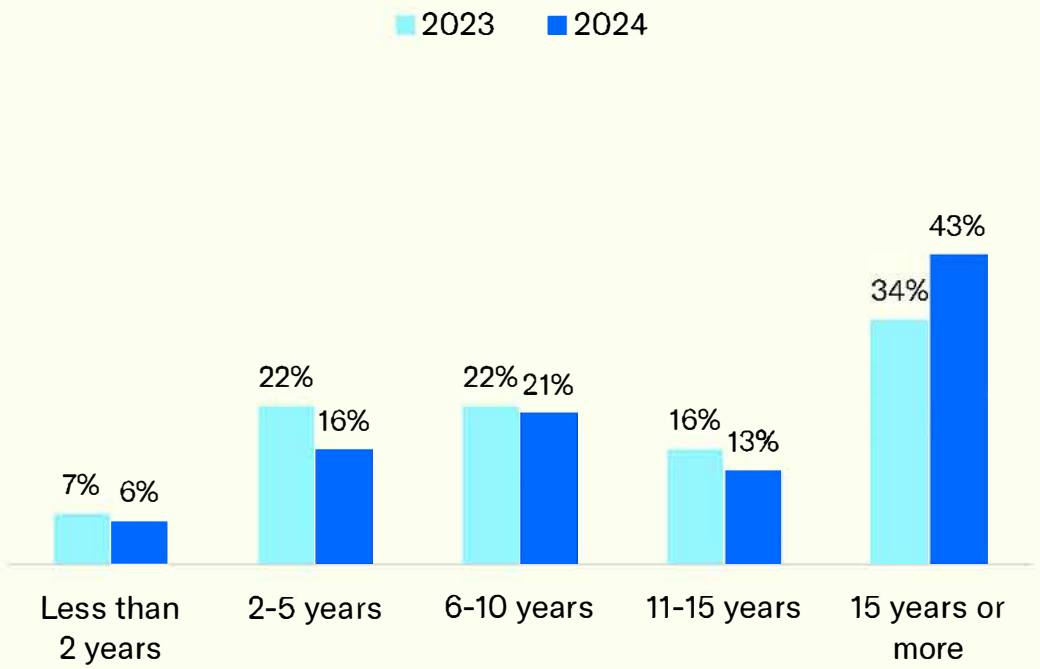


Question: Which best describes your Mammoth Lakes residence? | For how many months out of the year do you reside in Mammoth Lakes?
Base Size: Total Residents (2023: 255; 2024: 405).

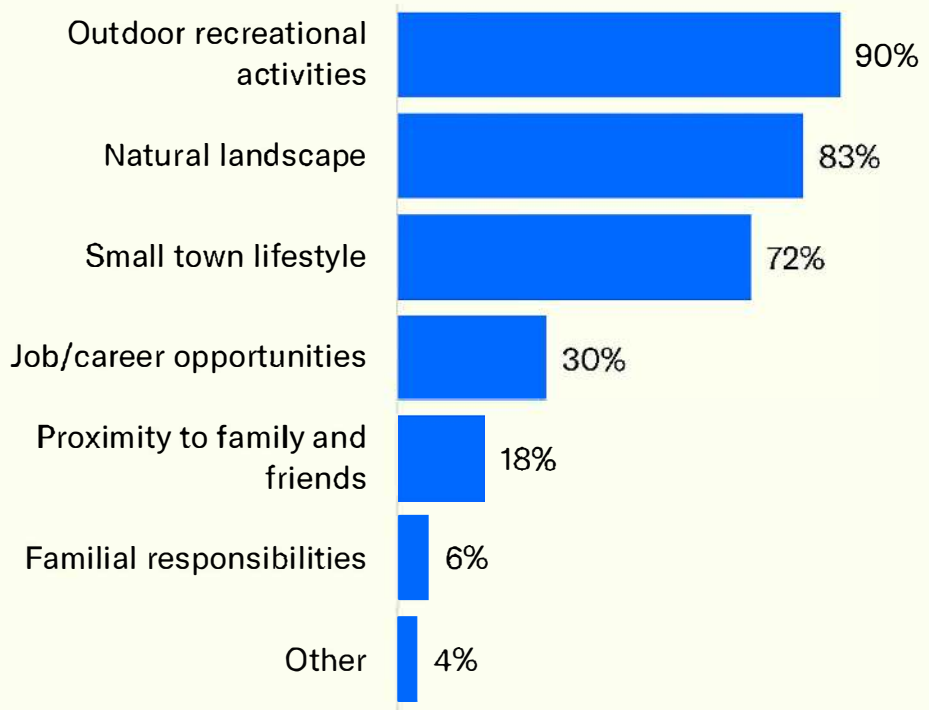
Mammoth Lakes residents represent long-term denizens who choose the area for its outdoor recreation, natural landscape and small-town lifestyle.

Three-quarters of resident survey respondents have lived in Mammoth Lakes over 5 years (78% in 2024; 72% in 2023) and over half have been there more than 10 years (56% in 2024; 50% in 2023). Residents cite outdoor recreational activities (90%), the natural landscape (83%), and small-town lifestyle as top draws for living there.

Length of Residency or Homeownership



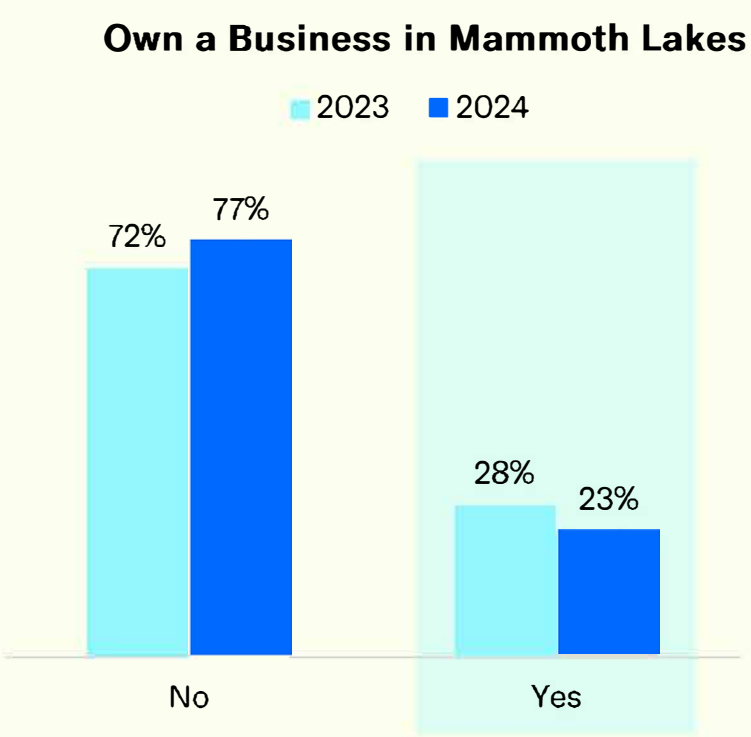
Top Reasons for Living in Mammoth Lakes

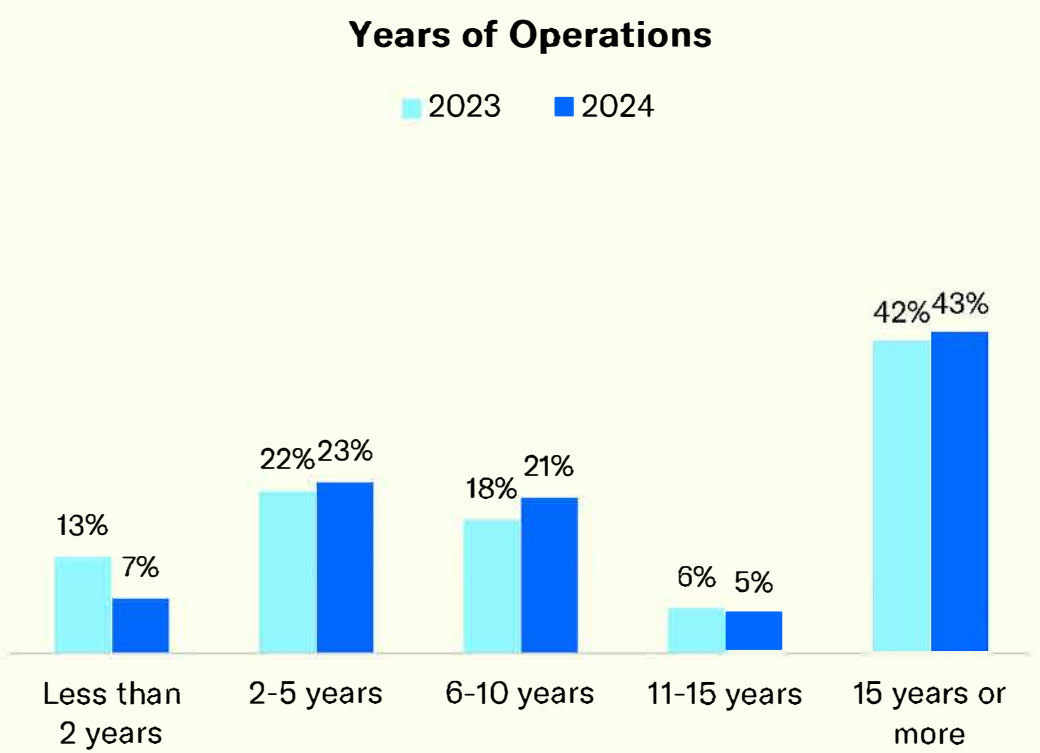


Question: How long have you lived in or owned a residence in Mammoth Lakes? | What are the main reasons for living in Mammoth Lakes?
Base Size: Total Residents (2023: 255; 2024: 405).

Almost a quarter of residents surveyed own a business in Mammoth Lakes.

Although the types of businesses owned vary greatly, the vast majority have operated for more than 5 years, very similar to the profile in 2023.

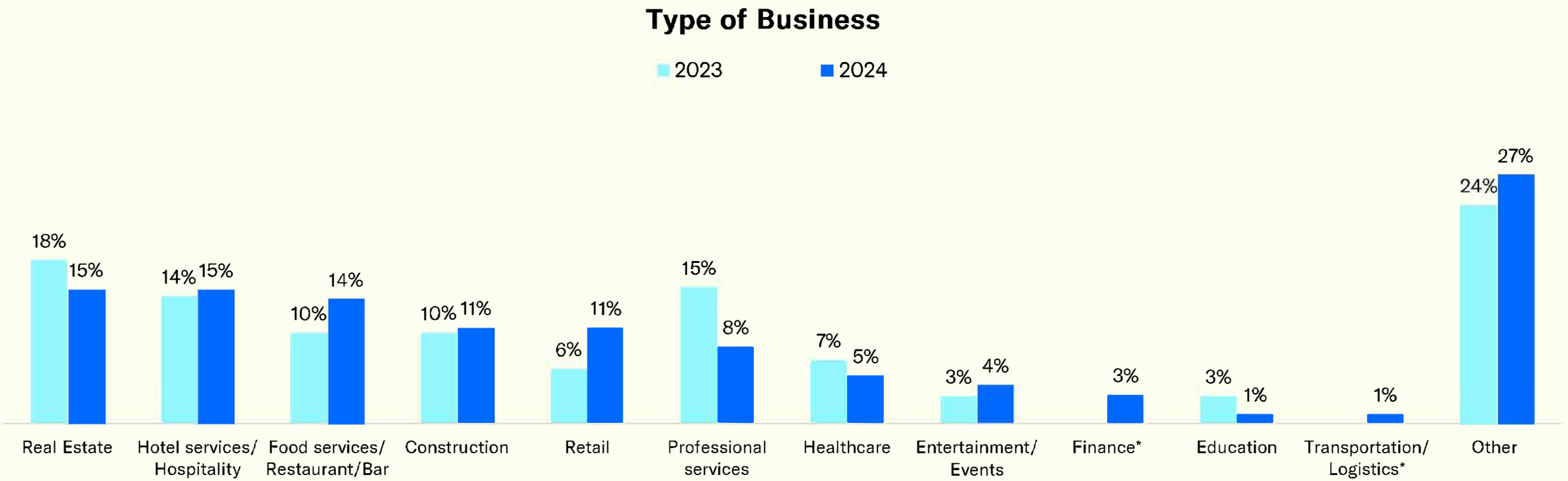




Question: Do you own a business that operates in Mammoth Lakes? | About how long has your company been doing business in Mammoth Lakes?
Base Size: Total Respondents (2023: 258; 2024: 411); Business Owners (2023: 72; 2024: 95).

Real estate, hotels/hospitality, and food services/restaurants top the list of business types, with nearly equal representation in 2024.

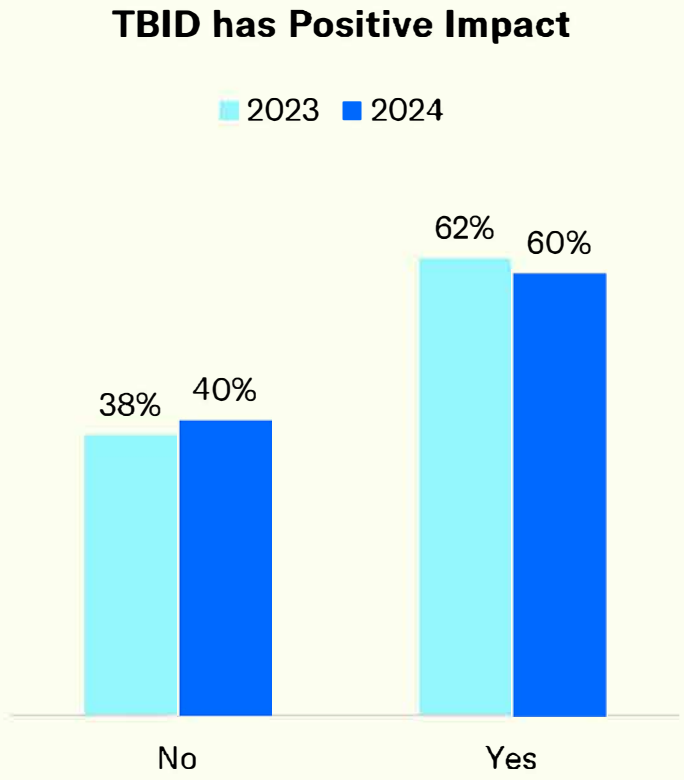
The majority of business owners surveyed have businesses in the tourism industry or adjacent industries. Over one-quarter of business owners surveyed (27%) have businesses outside of the industries specifically identified.

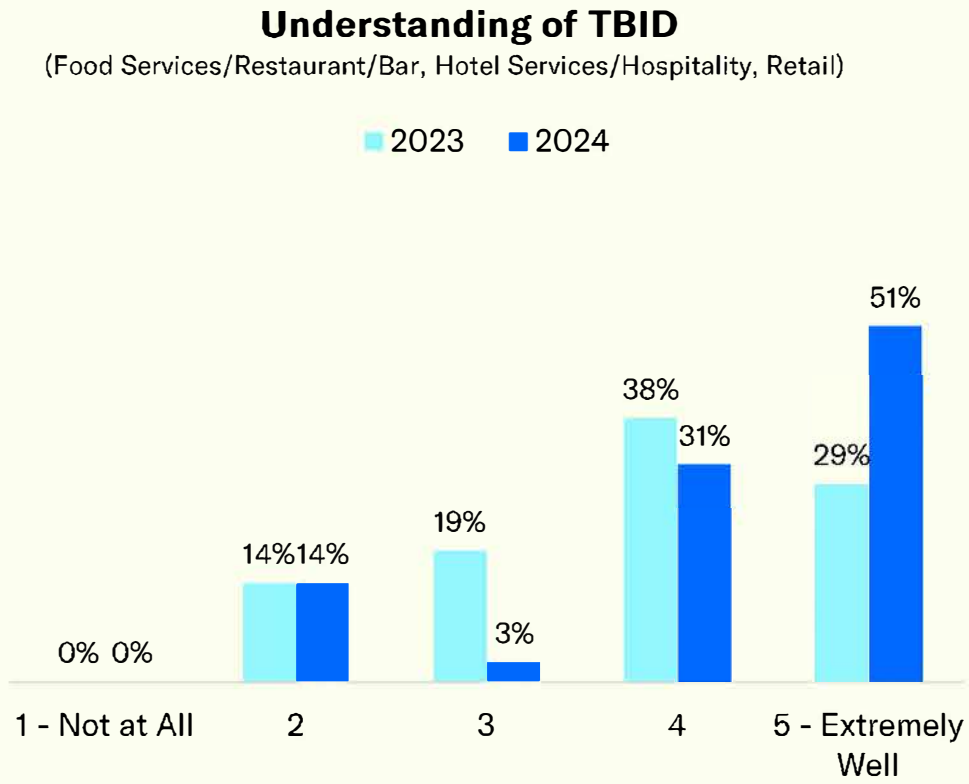


*Added in the 2024 survey.
Question: What type of business do you operate in Mammoth Lakes?
Base Size: Business Owners (2023: 72; 2024: 95).

A majority of business owners continue to feel that the TBID assessment has a positive impact on their business and the community at large.

Although based on a small sample size, the share of business owners who feel they understand how TBID funds are used increased to 51% from 29% a year ago. Further, all relevant business owners feel that they have at least some understanding of TBID funds usage.

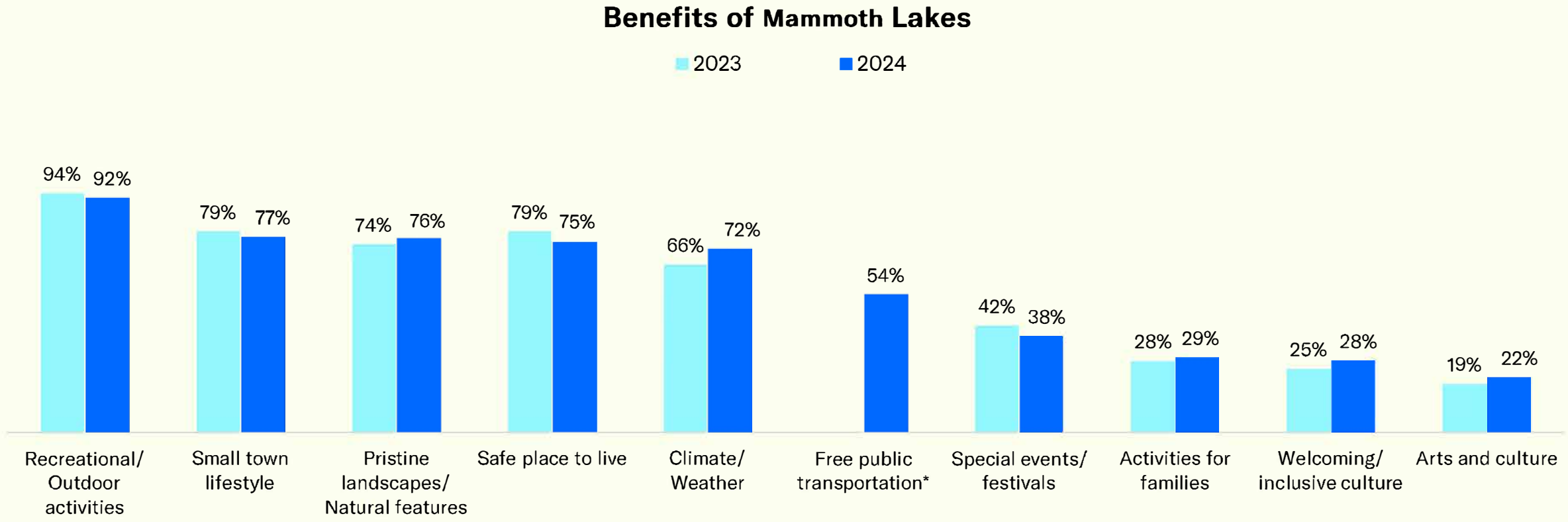




Mammoth Lakes' Tourism Improvement District (TBID).
Question: As a business owner in the Mammoth Lakes community do you feel that your TBID assessment provides a positive impact on you, your business, and the community? |
And how well do you understand how your TBID assessed dollars are used?
Base Size: "Food services/ Restaurant/ Bar", "Hotel services/ Hospitality", "Retail" Business Owners (2023: 21; 2024: 35).

The most widely appreciated benefits of Mammoth Lakes by its residents continue to be outdoor recreation/activities, small-town lifestyle, pristine natural landscapes, and its safe environment.

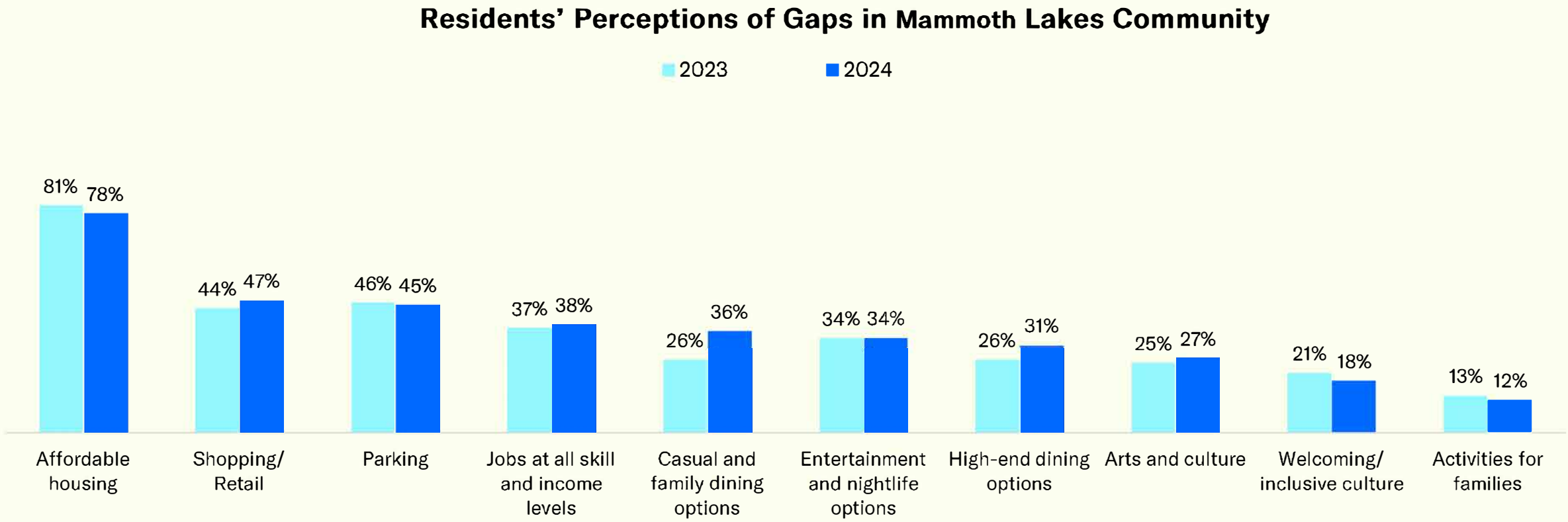
Climate/weather as a benefit of living in Mammoth Lakes increased 6-points from 2023 to 72%. Although still a top benefit, being a safe place to live declined 4-points from 2023. Special events/festivals also had a 4-point decline to 38%. Free public transportation was added as a response option in 2024; 54% of residents named it as a benefit they most appreciate about living in the area.



*Added in the 2024 survey/was not asked in 2023.
Question: Which of the following benefits do you appreciate about the Mammoth Lakes community? | Base Size: Total Respondents (2023: 258; 2024: 411).

Affordable housing continues to top the list of what residents find lacking in the Mammoth Lakes community.

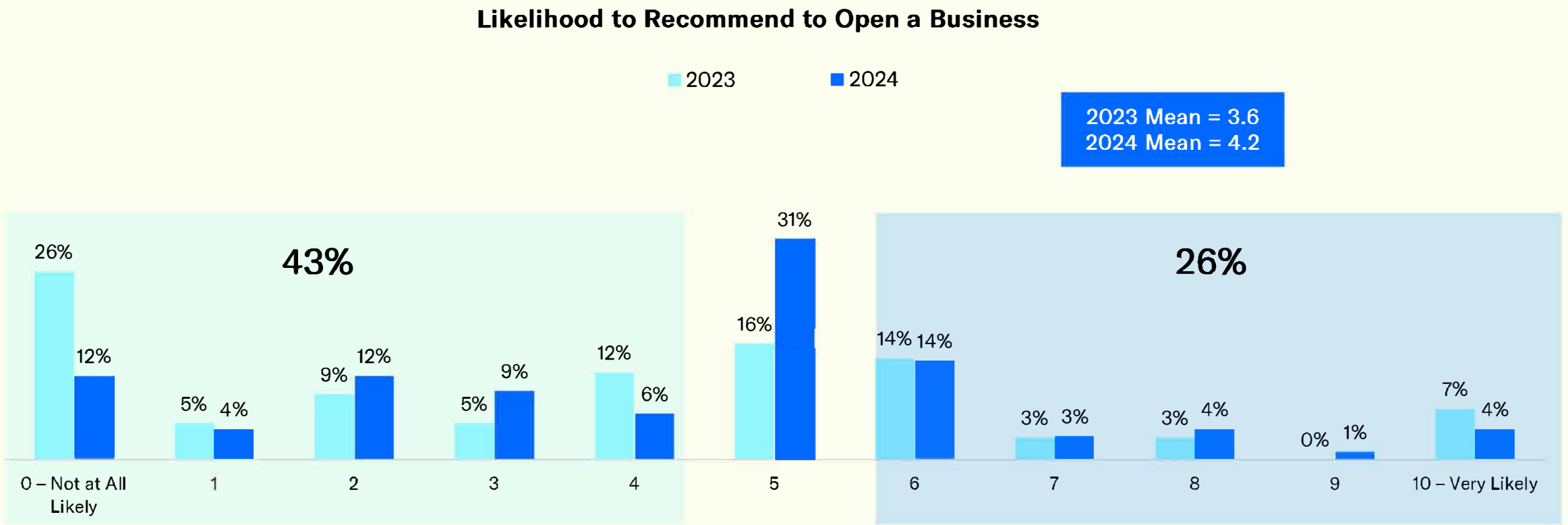
Although down 3-points from a year ago, 78% of residents still cite affordable housing as a gap, followed by shopping/retail (47%) and parking (45%). Generally, residents name the same elements as missing as a year ago, except more of them now note a shortage in casual/family dining options (36% from 26%).



Question: Which of the following do you feel is lacking in the Mammoth Lakes community? | Base Size: Total Respondents (2023: 258; 2024: 411).

Only one-in-ten Mammoth Lakes business owners would strongly recommend the area as a place to start or open a business.

On a 10-point scale on how likely they would be to recommend Mammoth Lakes to someone as a place to start or open a new business, just 9% of business owners responded 8 or above. However, business owners have shifted from being "not at all likely" to recommend it (12% from 26%) to being more neutral/non-committal (31% from 16% rate the recommendation level as a "5") since 2023.



Question: How likely are you to recommend Mammoth Lakes to someone as a place to start or open a new business? | Base Size: Business Owners (2023: 74; 2024: 95).

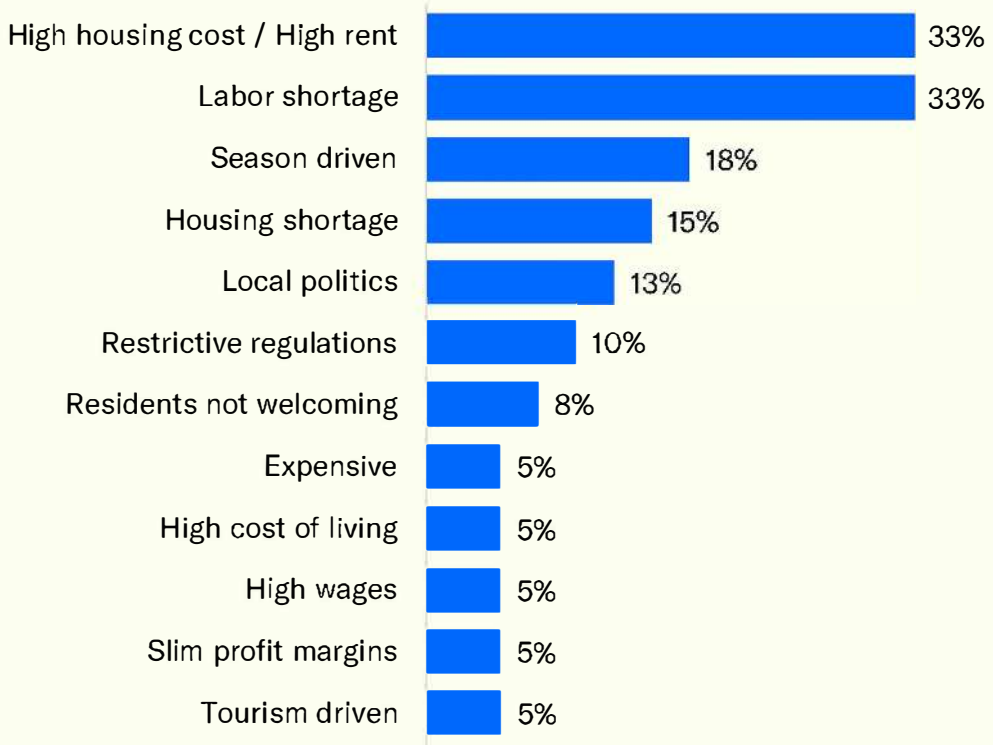
Reluctance to recommend the area for starting a business focuses on two highly-related issues: housing costs and labor shortage.

Business owners noted similar concerns in 2023, when they cited employees, housing, and costs as the primary reasons to not recommend opening/ starting a business in Mammoth Lakes.

> *Because they [Business Owners] aren't going to be able to find any place to live. And they probably won't be able to find full-time employees because of the lack of affordable housing and lack of workforce housing.*
>
> Resident

> *Cost of living is extremely high and taxes and regulations in California are pretty restricting. Specifically in the natural resources side, it is extremely difficult to get permits in our forests.*
>
> Resident

Common Reasons for Being Unlikely to Recommend to Open a Business



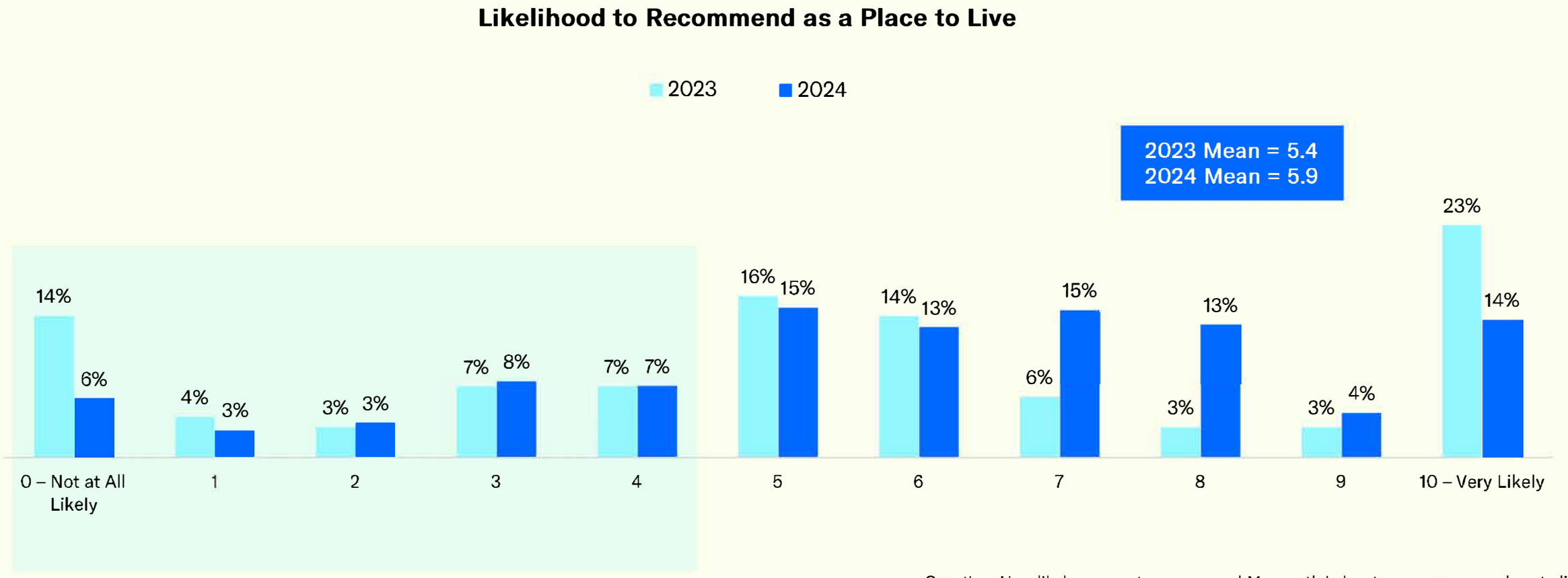
Question: Why would you not recommend Mammoth Lakes to someone as a place to start or open a new business? (Coded open-ended responses)
Base Size: Business Owners Not Recommending to Start or Open a New Business (2024: 39).

“The regulations imposed on business from the State and Town are too impactful. There are many other places where the value for the investment is much greater. It is also hard to tell what new regulation will be imposed on home/business owners. For example, the new regulations on STR's or the new 2% Occupancy Tax that passed. It is too regulated for someone coming in to start something new.”

Resident

A majority of residents (59%) would recommend Mammoth Lakes as a place to live, up from 49% in 2023.

Although the ardent fans (those who rate it a “10”) fell 9-points from 2023 to 14%, those positively recommending Mammoth Lakes (rating it 6 or higher on a 10-point scale) climbed 10-points. Meanwhile, far fewer say they would absolutely not recommend the area (6% saying “0, not at all likely” down from 14%).



Question: How likely are you to recommend Mammoth Lakes to someone as a place to live? | Base Size: Total Respondents (2023: 258; 2024: 411).

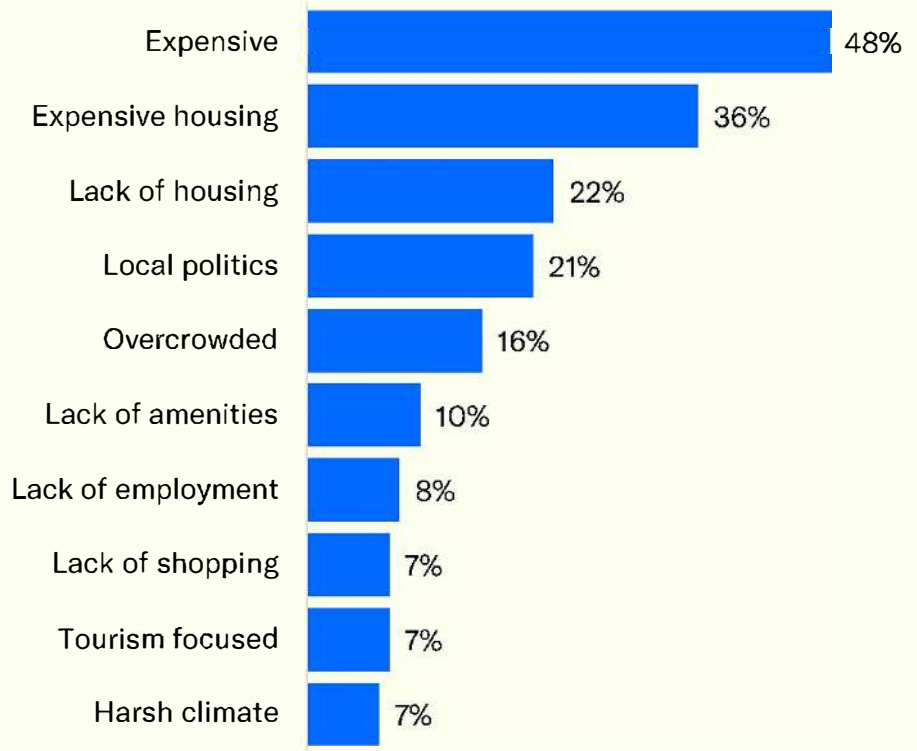
Cost of living (general and housing) and lack of housing dominate reasons for not recommending Mammoth Lakes as a place to live.

Similar results occurred in 2023 when, again, housing and costs were cited as the top reasons for not recommending the area as a place to live. Quotes from an open-ended follow-up question are shown below to provide further perspective.

> *Too expensive and too small town. But it's great for vacations and part-time living. Just wouldn't recommend as full-time primary residence because I wouldn't want to live here full-time.*
>
> Resident

> *There is a major missing middle market and finding housing, let alone affordable housing is very difficult. Cost of living is extremely high, and wages are low.*
>
> Resident

Common Reasons for Being Unlikely to Recommend as a Place to Live



Question: How likely are you to recommend Mammoth Lakes to someone as a place to live? | Why would you not recommend Mammoth Lakes to someone as a as a place to live? (Coded open-ended responses)
Base Size: Total Respondents Not Recommending as a Place to Live (2024: 107).

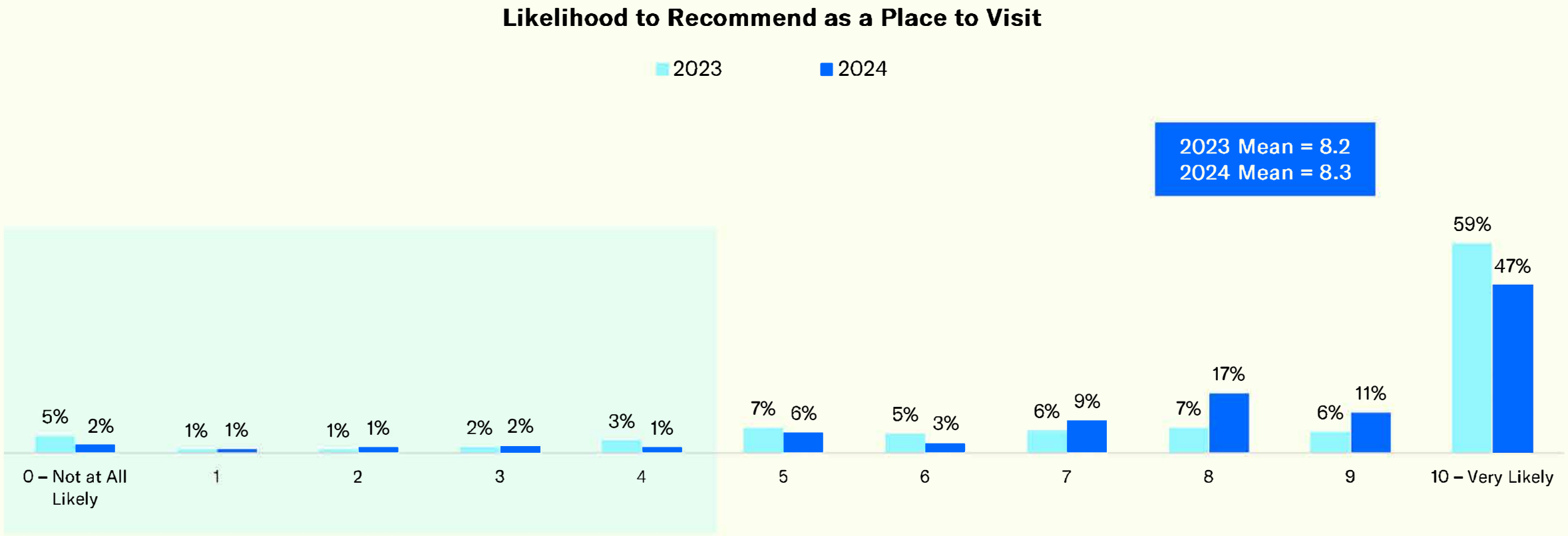
Why would you not recommend Mammoth Lakes to someone as a place to live?
(Open-ended)

"Housing is not as readily available as it used to be and if coming to rent or own pricing has gone up significantly making it difficult to start a life in this town. Additionally, due to high pricing it has become apparent many have to work two jobs which limits work-life balance. Lots of new development is happening which also contributes to not feeling like it is not as much of a small town environment anymore."

Resident

However, residents continue to enthusiastically recommend Mammoth Lakes as a place to visit for a leisure vacation.

Three quarters of residents would recommend the area for a leisure vacation (75% rate it “8+”), similar to 2023 (72%).



Question: How likely are you to recommend Mammoth Lakes to someone as a place As a place to visit for a leisure vacation? | Base Size: Total Respondents (2023: 258; 2024: 411).

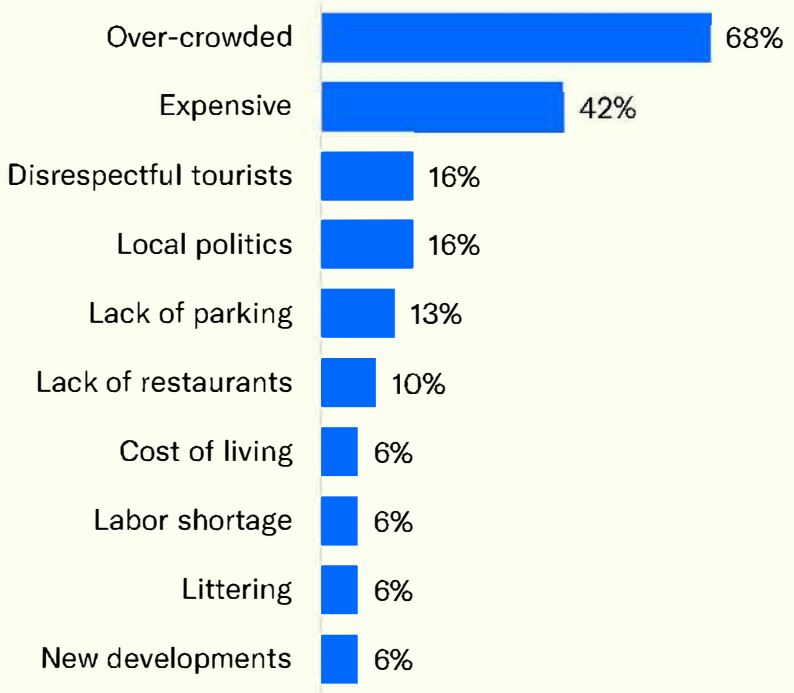
Those unlikely to recommend Mammoth Lakes for a leisure vacation primarily point to over-crowding and, secondarily, expense.

These two main issues, over-crowding and expense, were also top in 2023. However, while those noting over-crowding remains flat (68% in 2024; 69% in 2023), those mentioning expense climbs markedly (42% say expensive in 2024 vs. 27% who said costs in 2023).

> *Too crowded, overpriced, other tourists act disgustingly entitled, human waste in parking lots and scenic pull offs, disregard for basic traffic laws, public facing employees seem burnt out.*
>
> Resident

> *It is already overrun with tourists. The mountain is too crowded. No variety of restaurants. Grocery stores can already not handle crowds.*
>
> Resident

Common Reasons for Being Unlikely to Recommend as a Place to Visit



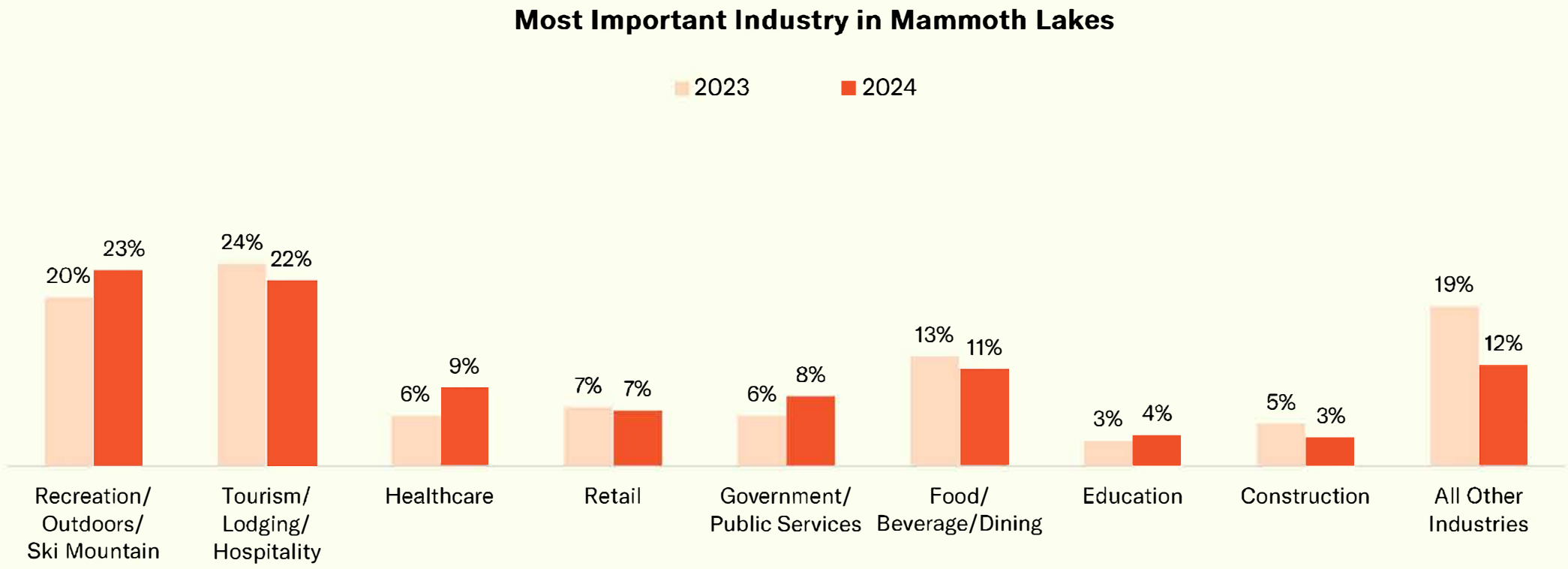
Question: Why would you not recommend Mammoth Lakes to someone as a place to visit for a leisure vacation? (Coded open-ended responses)
Base Size: Total Respondents Not Recommending to Visit (2024: 31).

“There isn't enough space for people to visit and still have an enjoyable experience - the lines at the mountain are long and the runs are crowded, the weekend wait at restaurants average 60+ minutes, getting a pass into Yosemite or a wilderness permit is difficult because they sell out so quickly, parking lots at trailheads at the lakes basin fill up quickly, and although it may be spacious for folks coming from major cities, navigating the downtown area is stressful and finding quiet in natural spaces for families is nearly impossible, especially for families with strollers or young children. It isn't the relaxing, outdoor experience it once was.”

Resident

“Recreation/Outdoors” and “Tourism/Lodging/ Hospitality” are what residents perceive as the most important industries in Mammoth Lakes.

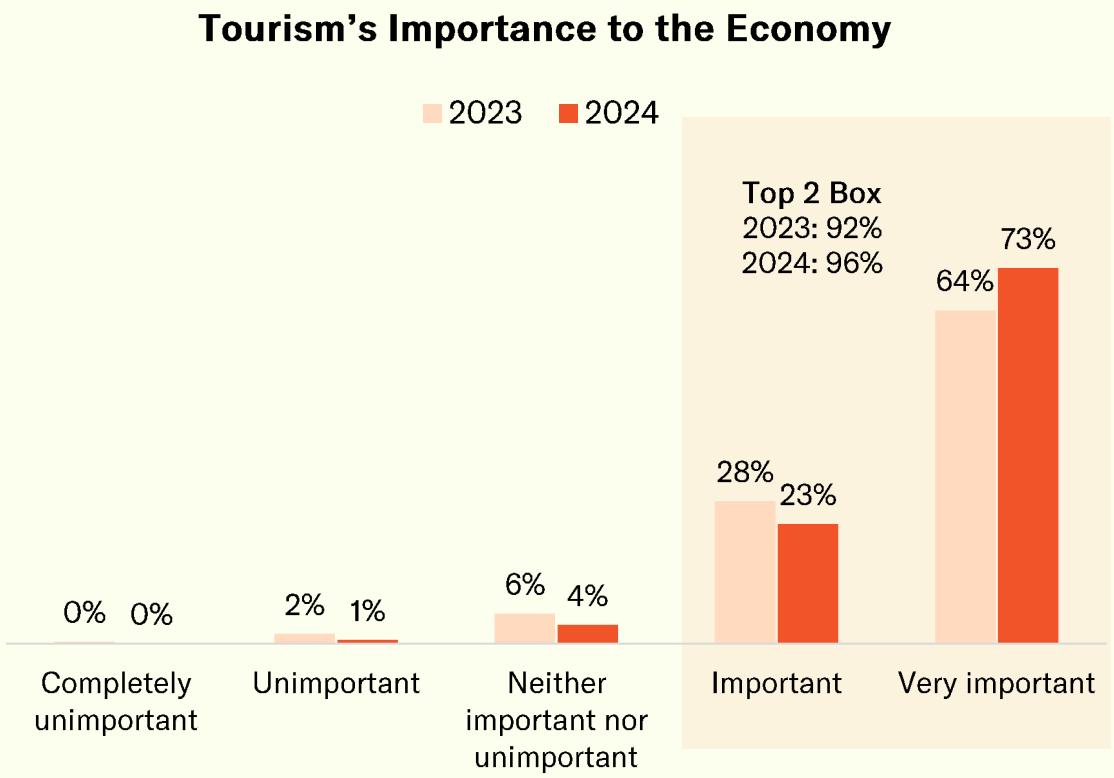
Although they swap positions in rank, residents most often cited these same two industries in 2023 as well.



Question: In your opinion, what are Mammoth Lakes’ most important industries? Please rank the three industries that come to mind, beginning with the most important. (Coded open-ended responses)
Base Size: Total Respondents (2024: 409; 2023: 258).

Nearly all residents agree that tourism is important to the vitality of the Mammoth Lakes economy (96%, top 2 box).

That high opinion strengthened slightly in 2024 (96% vs. 92% in 2023).

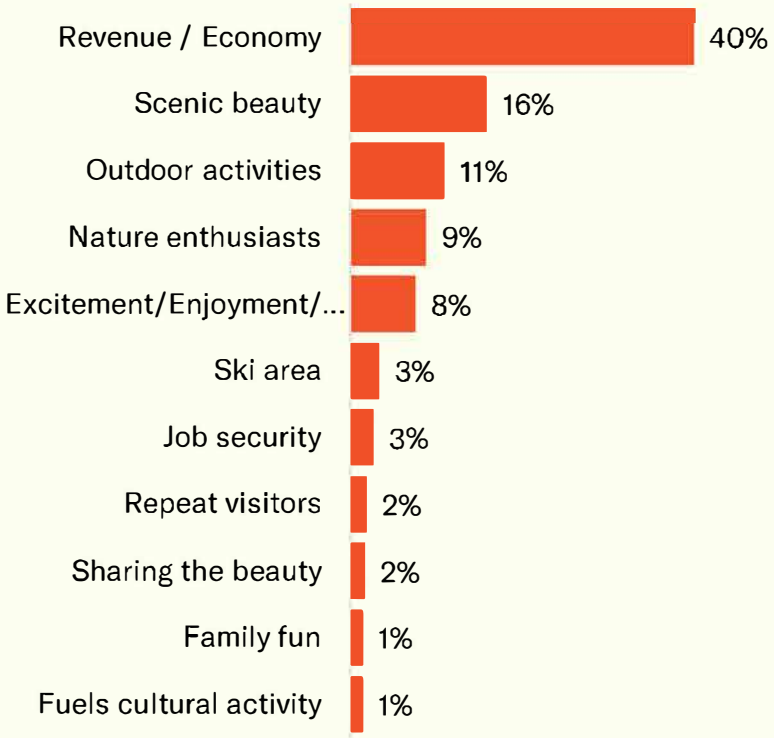


Question: How important is the tourism industry to the vitality of the Mammoth Lakes economy?
Base Size: Total Respondents (2023: 258; 2024: 411).

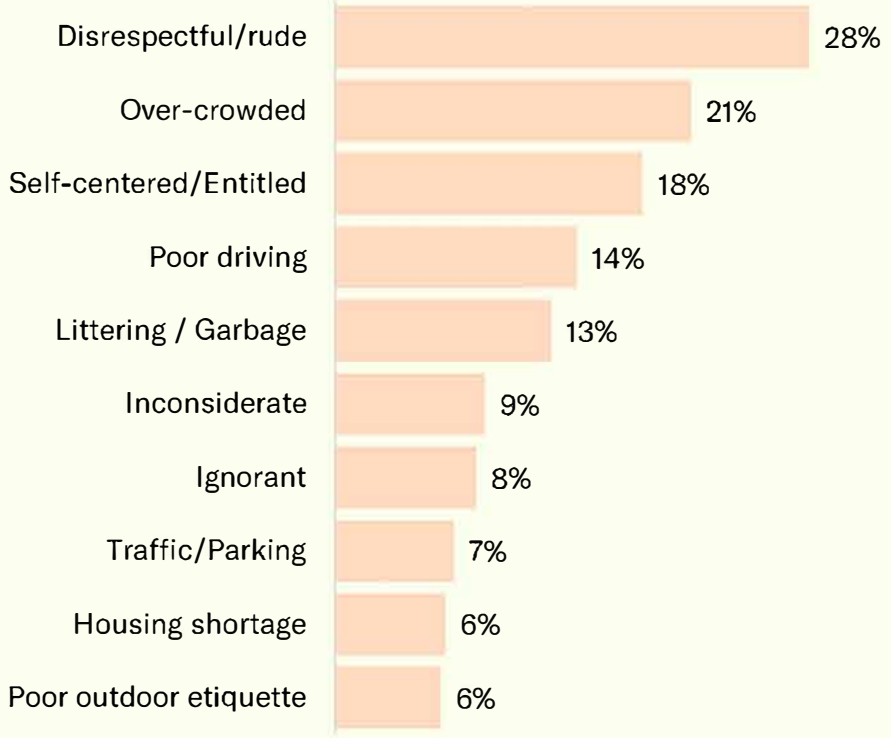


Similar to 2023, residents most positively associate visitors with revenue/economic impact and most negatively associate them with disrespect/rudeness.

Positive Associations with Mammoth Lakes Visitors



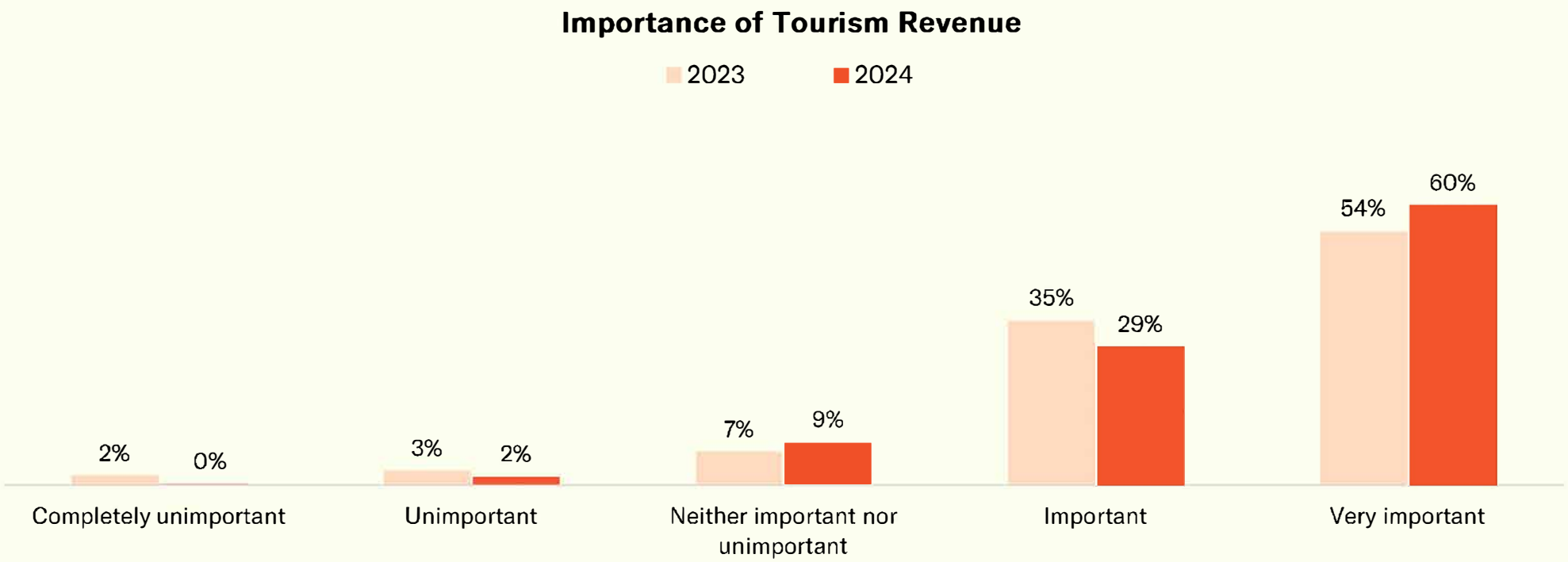
Negative Associations with Mammoth Lakes Visitors



Question: When you think of visitors to Mammoth Lakes, what is the first positive thing that comes to mind? | When you think of visitors to Mammoth Lakes, what is the first negative thing that comes to mind?
(Coded open-ended responses)
Base Size: Total Respondents (2024: 389-405).

Nine-in-ten residents acknowledge the importance of tourism revenues in funding government services.

Residents of Mammoth Lakes continue to agree that tourism revenues are important in paying for governmental services, similar to a year ago (89% in 2024; 89% in 2023, top 2 box).



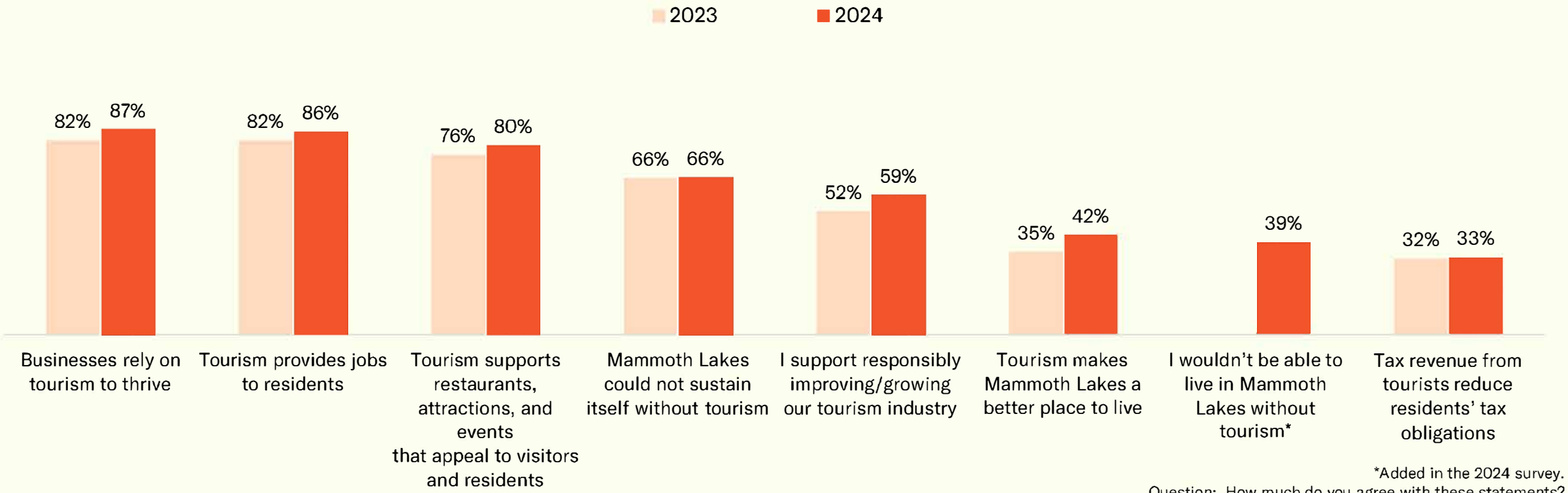
Question: How important are tourism-generated revenues in paying for Mammoth Lakes' essential government services (i.e., housing, police, snow removal, schools, parks, trails, parking, roads, recreational facilities, and repairs)? |
Base Size: Total Respondents (2024: 411).

Similar to the past, residents generally agree that tourism adds support and benefits to the area's economy and wealth.

Nearly nine-in-ten residents agree businesses rely on tourism to thrive. 80% feel tourism supports restaurants, attractions and events that appeal to both visitors and residents. However, although it has improved 7-points, note that just 42% say tourism makes Mammoth Lakes a better place to live and less than 40% say they wouldn't be able to live in Mammoth Lakes without tourism. As in 2023, two-thirds of residents (66%) feel Mammoth Lakes could not sustain itself without tourism.

Agreement with Statements on Tourism in Mammoth Lakes

(Top-2 Box Score- % selecting "4" and "5 – Completely agree")

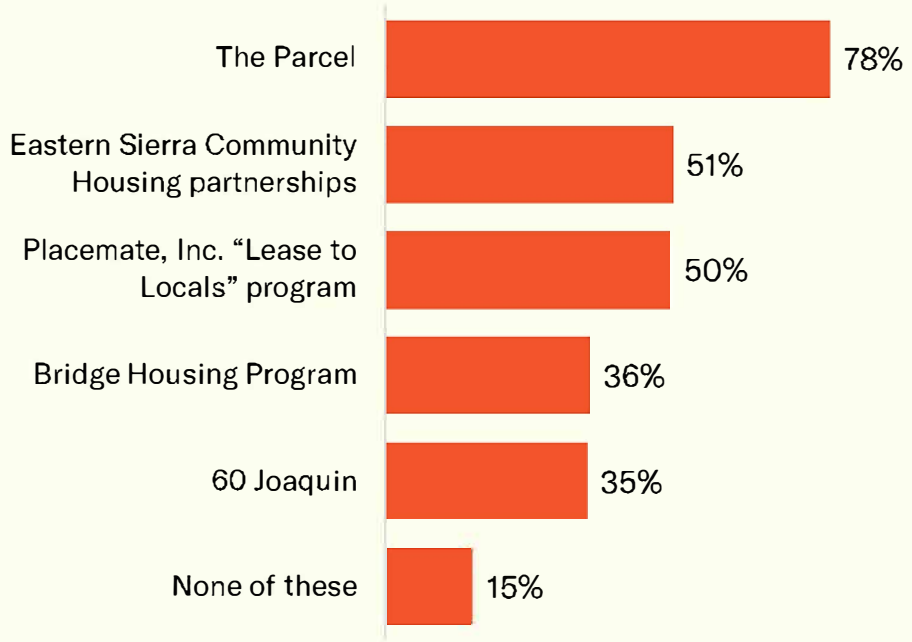


*Added in the 2024 survey.
Question: How much do you agree with these statements?
Base Size: Total Respondents (2024: 411).

Of five local housing initiatives funded by visitor revenue, residents are most aware of “The Parcel”.

More than three-quarters of residents are aware of The Parcel. Half of residents are familiar with Eastern Sierra Community Housing Partnerships and/or Placemate, Inc. Just over one-third are aware of the Bridge Housing Program and or 60 Joaquin.

Housing Initiatives Awareness

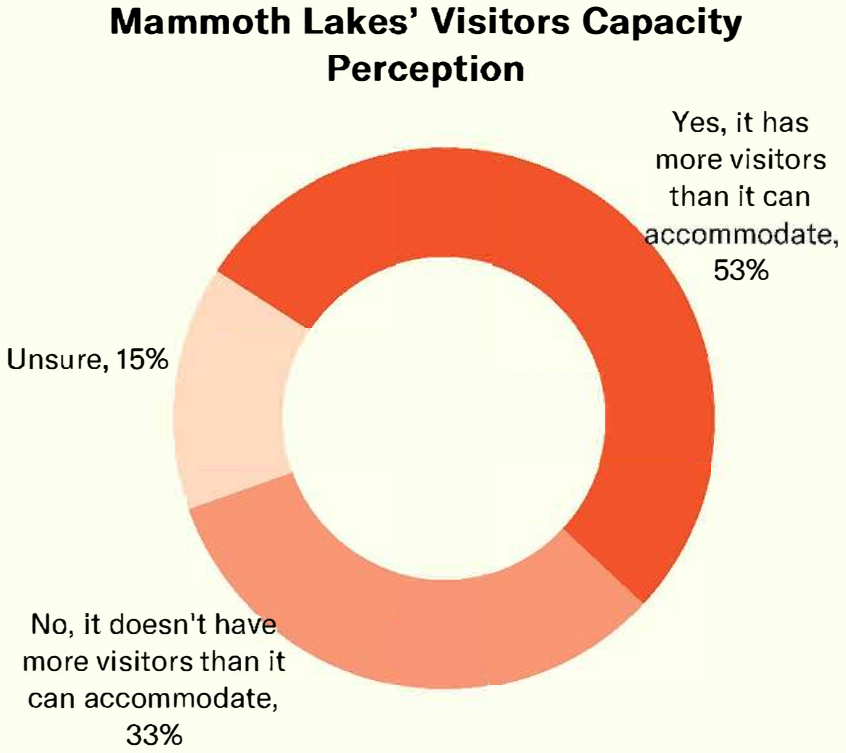


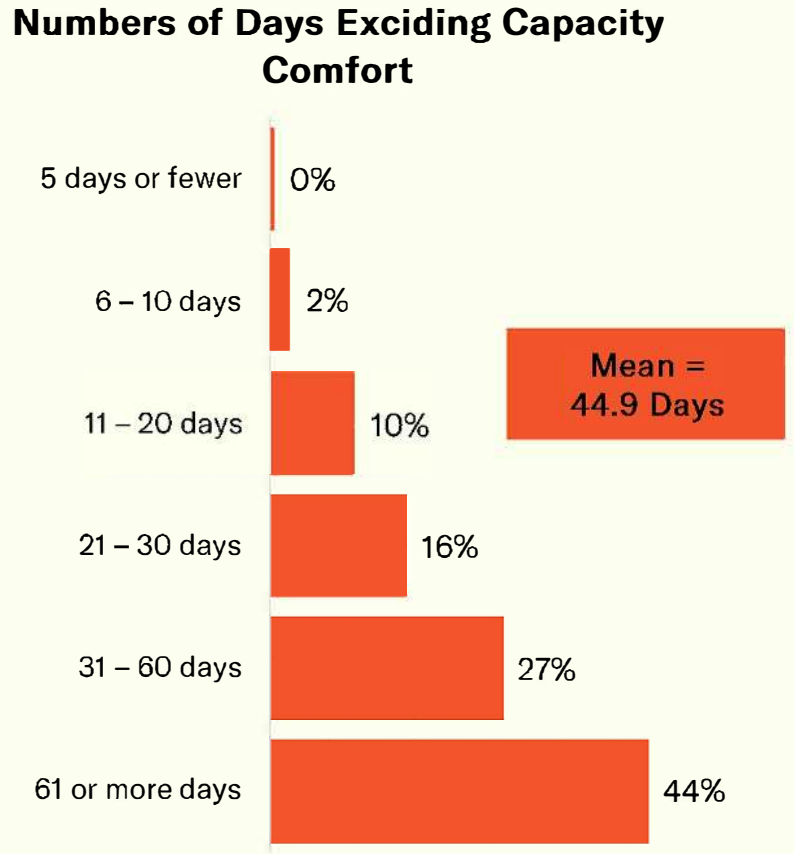
Question: Are you aware of any of the following housing initiatives, all of which are funded in whole or in part by revenue from visitors?
Base Size: Total Respondents (2024 411).



More than half of Mammoth Lakes residents feel that the area hosts more visitors than it can accommodate (53%).

Further, they consider Mammoth Lakes over-touristed/over capacity an average of 44.9 days of the year (approximately 6 weeks). Almost half of residents feel tourism exceeds the area's capacity for at least two months of the year (44% say 61 days or more).

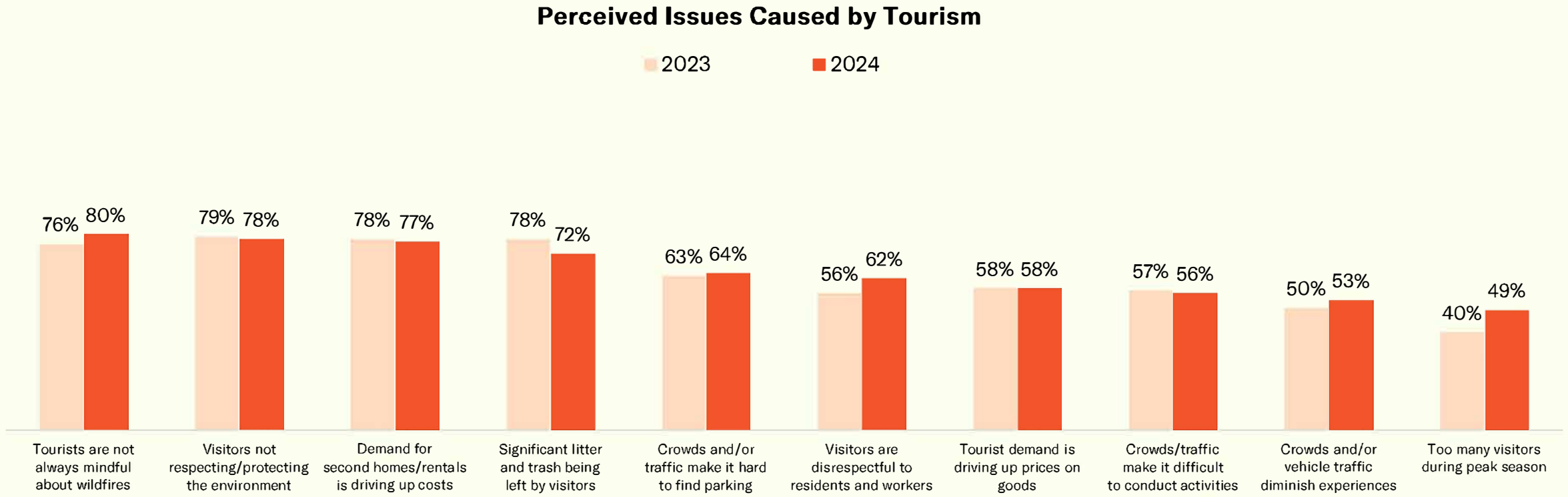




Question: Do you feel that Mammoth Lakes has more visitors than it can comfortably accommodate? | And how many days out of the year do you consider Mammoth Lakes to have more visitors than it can comfortably accommodate?
Base Size: Total Respondents (2024: 411); Respondents who said Mammoth Lakes has more visitors than it can accommodate (217).

Residents continue to perceive tourism as a catalyst for a number of economic, environmental, and lifestyle issues.

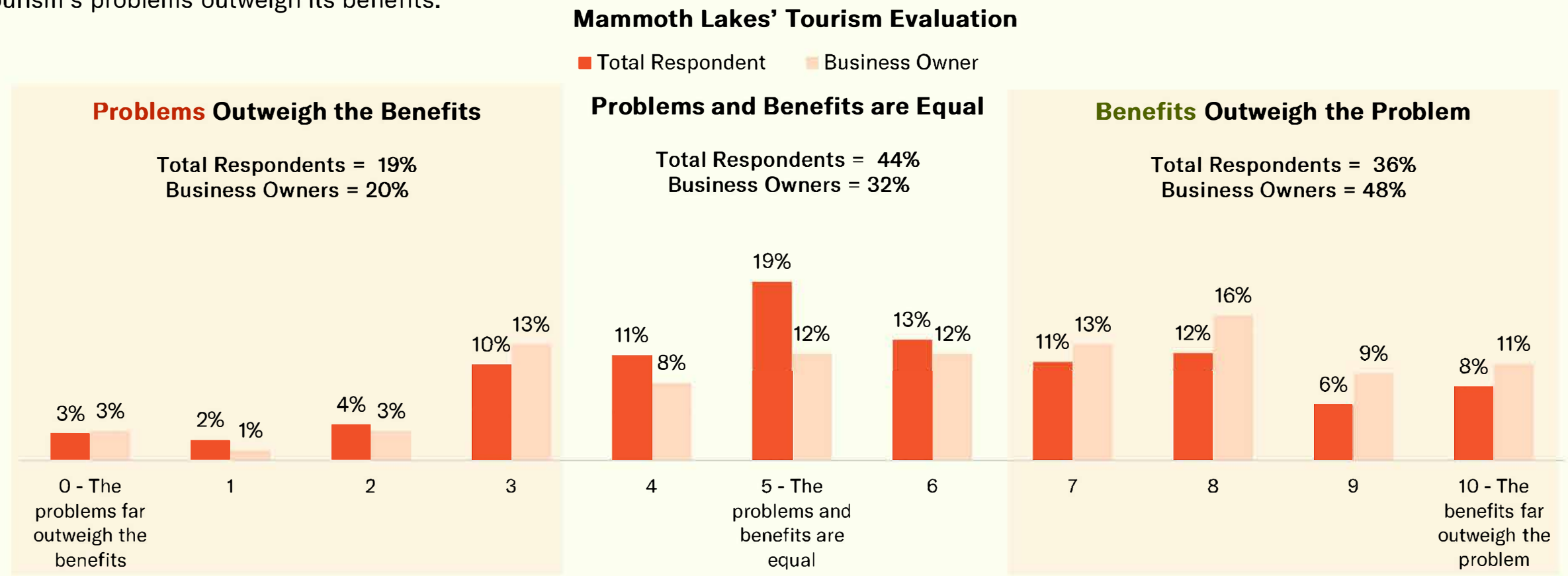
Four-in-five residents particularly point out three key environmental and economic issues impacted by tourism: mindfulness about wildfires, respect for the environment, and cost of homes/rentals. They also note lifestyle impacts, especially litter, although that has improved somewhat from 2023 (72% from 78%). In addition, at least half of residents say Mammoth Lakes is currently facing high prices, a lack of parking, increased traffic, and disrespectfulness due to tourism.



Question: Now think about potential issues that can be caused by tourism. Which of the following are problems Mammoth Lakes is currently facing?
Base Size: Total Respondents (2023: 258; 2024: 411).

Over one-third of residents (36%) and nearly half (48%) of business owners agree that tourism benefits outweigh its problem—a sentiment that is improving.

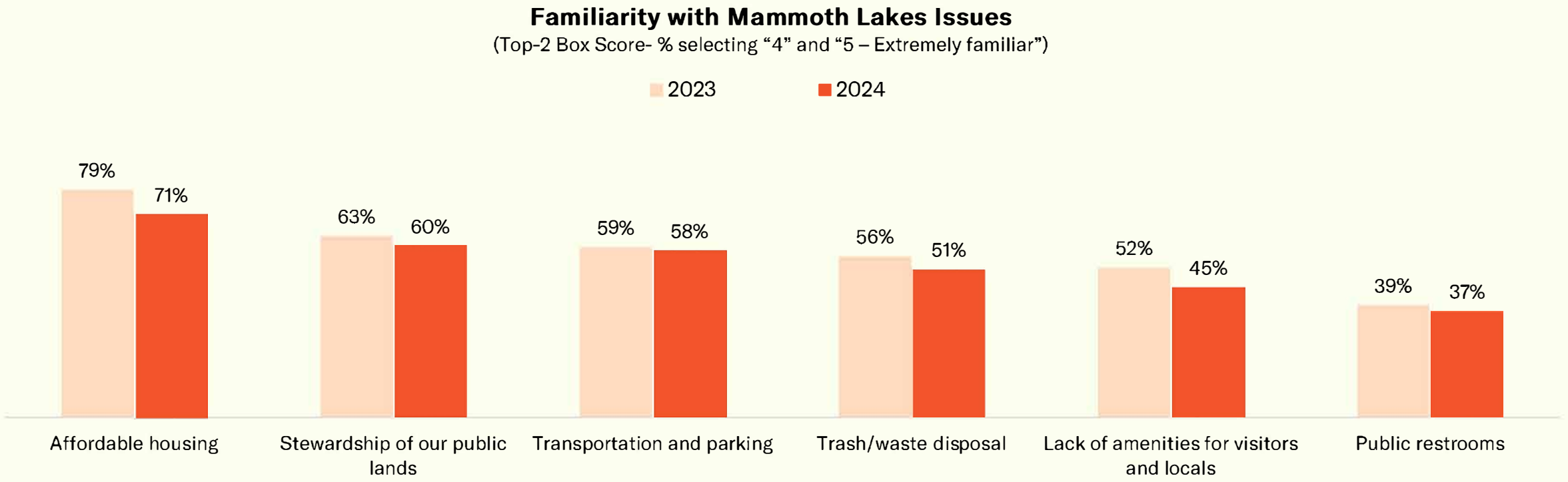
Those agreeing that tourism benefits outweigh problems improved among both total residents (36% from 27% in 2023) and business owners (48% from 42%). Over four-in-ten residents (44%) feel that the benefits and problems associated with tourism balance each other out and 19% think tourism's problems outweigh its benefits.



Question: And now consider both the overall benefits that tourism brings, as well as the problems or challenges. How would you evaluate tourism in Mammoth Lakes?
Base Size: Total Respondents (2024: 411); Business Owners (2024: 95)

Nearly three-in-four Mammoth Lakes residents feel familiar with the affordable housing issue and efforts to mitigate it.

Amongst the issues tested, residents feel most familiar with the affordable housing issue (71%), although this is fewer than in 2023 (79%). Approximately 60% feel familiar with efforts focused on stewardship of public lands, as well as transportation and parking.

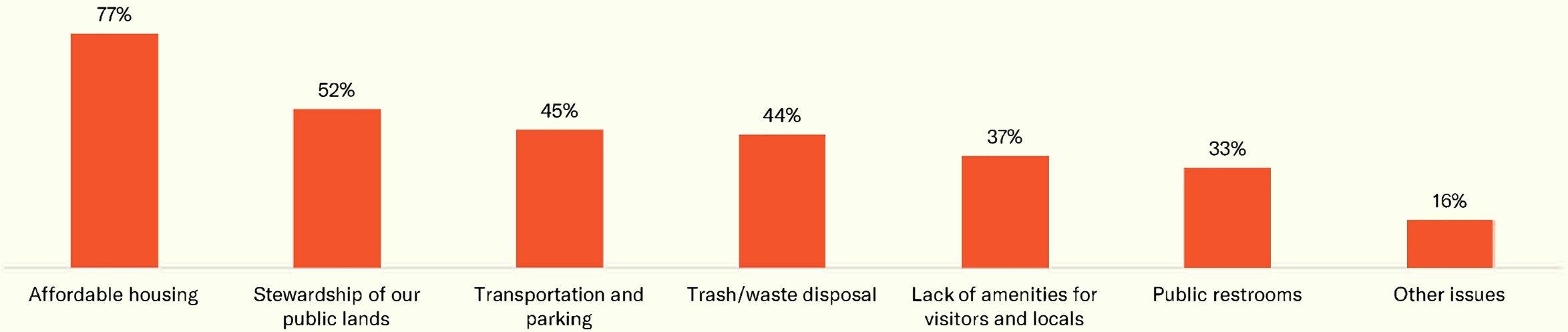


Question: How familiar are you with the following issues, and the efforts to mitigate them, in Mammoth Lakes? | Base Size: Total Respondents (2023: 258; 2024: 411).

Affordable housing ranks, by far, as the leading issue which Mammoth Lakes residents believe needs more attention.

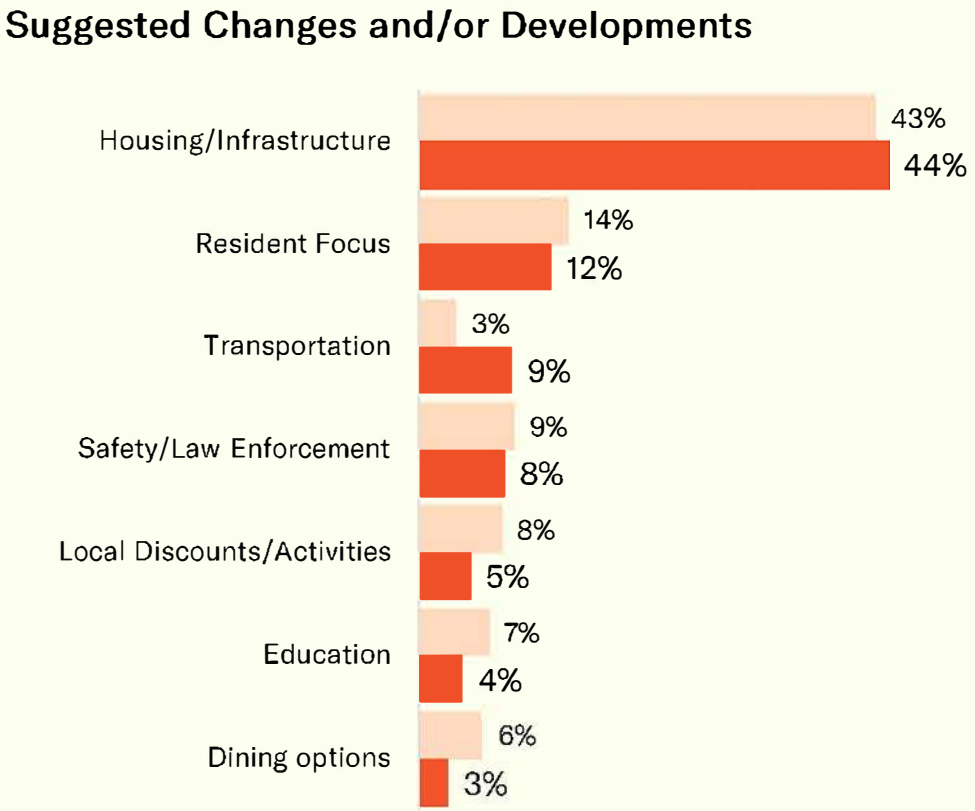
More than three-in-four residents cite affordable housing as an issue needing more attention (77%). A second tier of issues residents feel needs greater attention includes stewardship of public lands (52%), transportation and parking (45%), and trash/waste disposal (44%), each selected by about half of residents. Note: a similar question was asked in 2023, but it was around the concept of support rather than the concept of more attention.

Mammoth Lakes Issues Needing More Attention



Question: Which of the following issues need more attention in Mammoth Lakes?
Base Size: Total Respondents (2023: 258; 2024: 411).

As last year, the most commonly suggested change and/or development to improve Mammoth Lakes for both visitors and residents relates to adding more and better housing/infrastructure.



Question: And what changes and/or developments would contribute to making the Mammoth Lakes area better for BOTH visitors and residents?
Base Size: Total Respondents (2024: 401).

> *The need for affordable and accessible housing for Mammoth's residents is of utmost importance to me. Building more hotels (The Limelight) will certainly create more jobs in town, but where will these employees live? Also, the access of corporate money in Mammoth puts a strain on local small business owners to have to compete for employee retention and sustainability*
>
> Resident

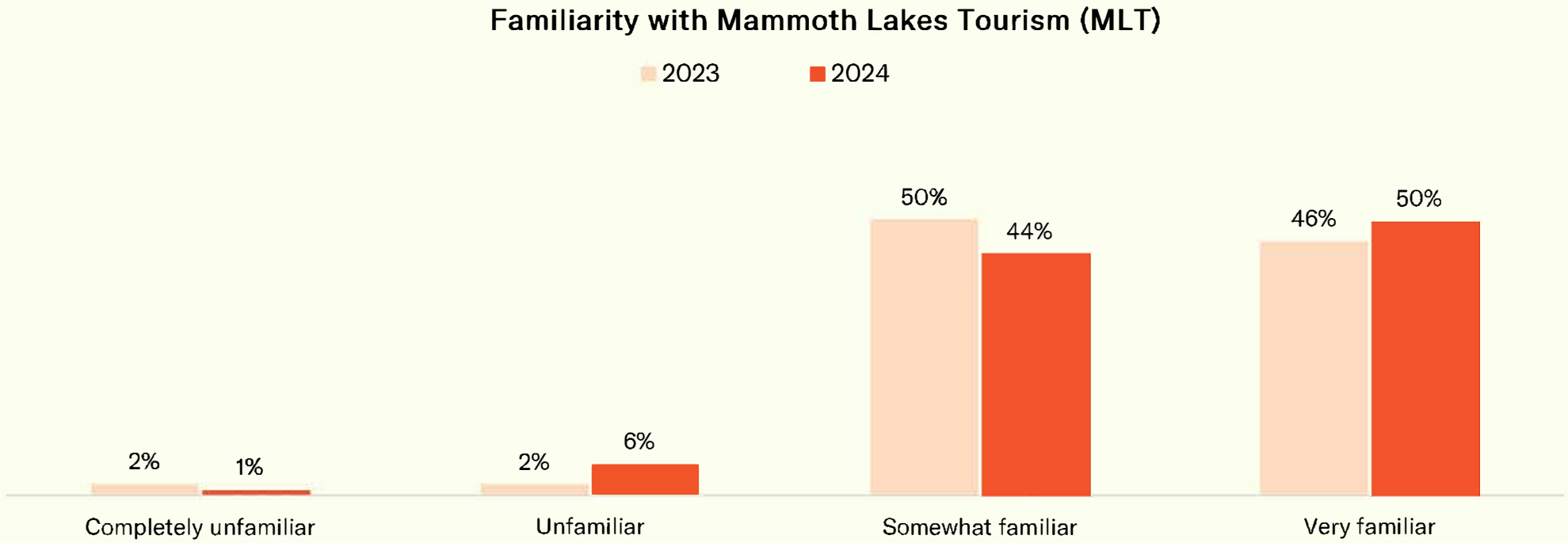
> *Maybe new ways of supporting community culture for long term residents. New residents have a hard time breaking into community, this, coupled with the high cost of living and housing difficulties, some leave and don't find their "place". This then leads to transient people vs. people who develop a deeper more meaningful connection with the community and then care more about contributing to it.*
>
> Resident

"If there is a desire to grow tourism in Mammoth Lakes, the housing problem (not just low income but also missing middle) needs to be addressed. Town, find professional employees, there needs to be housing options for them. By increasing missing middle housing. Town would increase its number of permanent working-class residents. When people with real professional skills are able to afford to stay and live in this town, they can contribute to better experiences for both visitors and residents. If Mammoth had better schools and behavioral health services, I also believe it would attract more middle-class working professionals who would positively affect Mammoth Lakes' tourism."

Resident

Almost all residents claim familiarity with Mammoth Lakes Tourism, similar to a year ago.

Among residents, the total familiarity with MLT remains nearly unchanged (94% in 2024 from 96% in 2023). Those feeling “very familiar” improved 4-points to 50% since last year, although those saying they are “unfamiliar” also rose 4-points (to 6%).



Question: How familiar are you with the Mammoth Lakes marketing organization (also known as Mammoth Lakes Tourism or Visit Mammoth) and what they do to promote responsible tourism in the area?
Base Size: Total Respondents (2023: 258; 2024: 411)

Among those familiar with Mammoth Lakes Tourism, most feel at least somewhat knowledge of the organization's mission, goals and responsibilities.

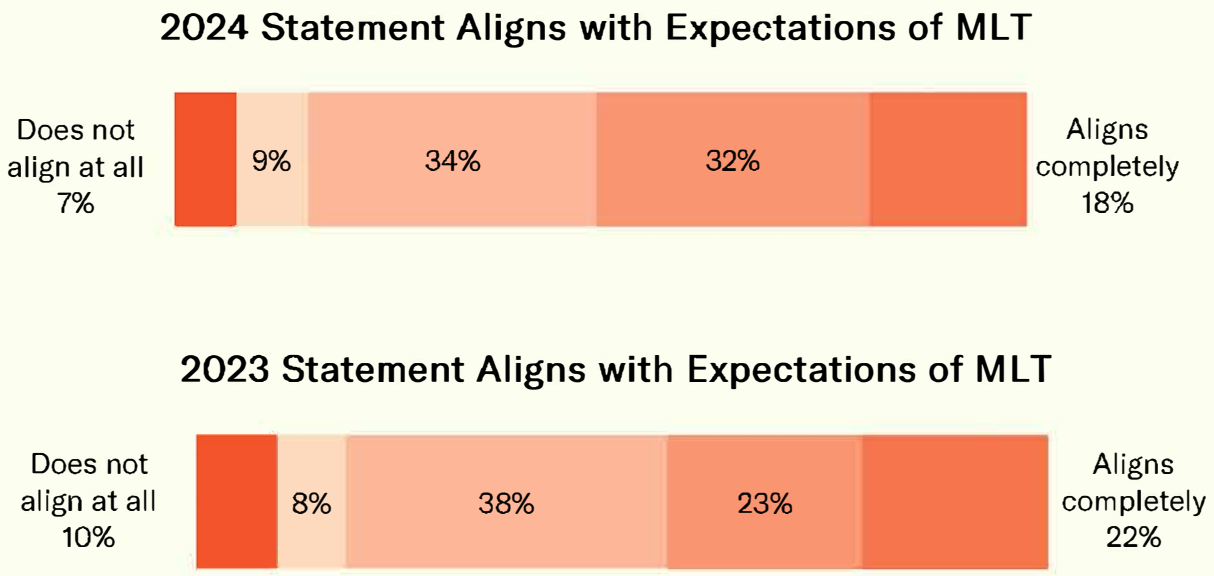
Nine-in-ten of those residents who are familiar with Mammoth Lakes Tourism feel "somewhat" or "very" knowledgeable about the organization (87%, similar to 2023). As in 2023, substantially more residents characterize themselves as "somewhat knowledgeable" rather than "very knowledgeable" (56% vs 32%).



Question: How well do you feel that you understand the mission, goals, and responsibilities of the Mammoth Lakes marketing organization (also known as Mammoth Lakes Tourism or Visit Mammoth)?
Base Size: Respondents Familiar with MLT (2023: 247; 2024: 384).

Residents largely feel MLT's mission statement aligns with their expectations.

Residents were presented with MLT's mission statement and asked to use a 5-point scale to rate how it aligned with expectations of the organization. Four-in-five residents (84%) feel it aligns to at least some degree. Further, half agree more strongly (51% top 2 box rating, up 6-points from 2023.

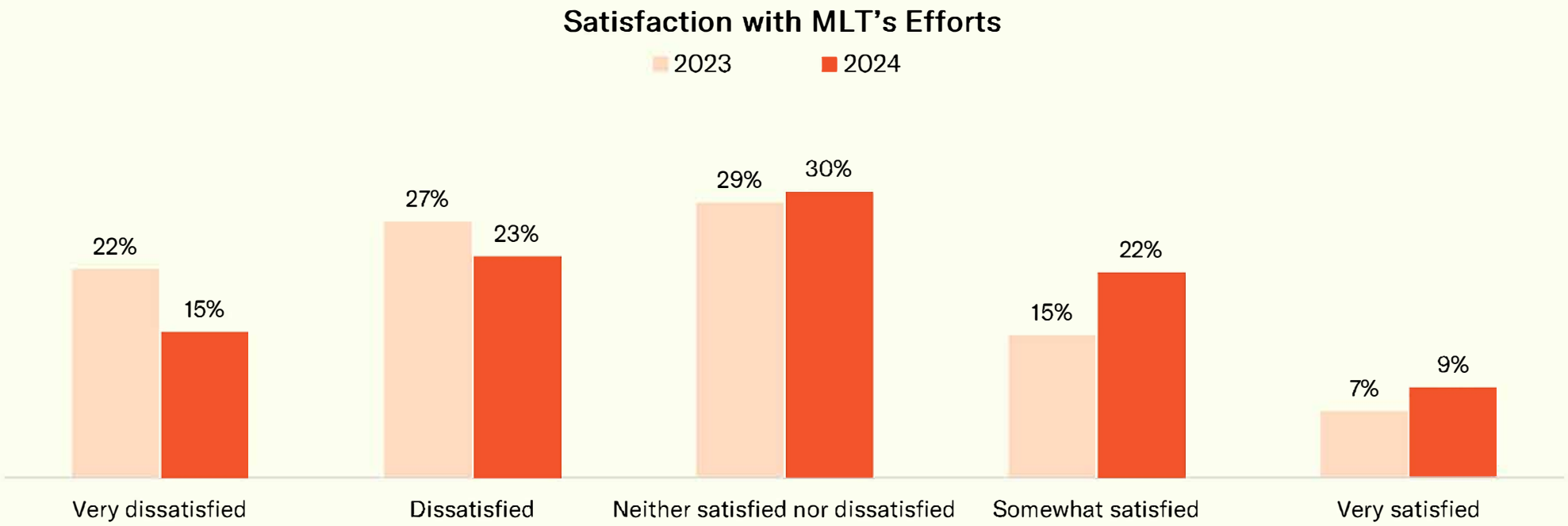


Mammoth Lakes Tourism (MLT) is the regional communications and marketing organization designed to educate visitors and promote Mammoth Lakes as a top global tourism destination. Funded primarily by the Mammoth Lakes Tourism Improvement District (TBID) and with additional secured funding from the Transient Occupancy Tax (TOT), MLT serves as an authority on travel and tourism to the Mammoth Lakes area and engages in opportunities and partnerships that will elevate the profile of the area, with a brand message of education and stewardship and a focus on driving non-peak visitation. Mammoth Lakes Tourism unifies business and community leaders to enhance the area and raise the relevance of travel to the destination.

Question: Does this align with expectations of the Mammoth Lakes marketing organization (also known as Mammoth Lakes Tourism or Visit Mammoth)?
Base Size: Respondents Familiar with MLT (2023: 247, 2024: 384).

Nearly one-third of residents are satisfied with MLT's efforts to balance increased tourism with residents' needs, improving from 2023.

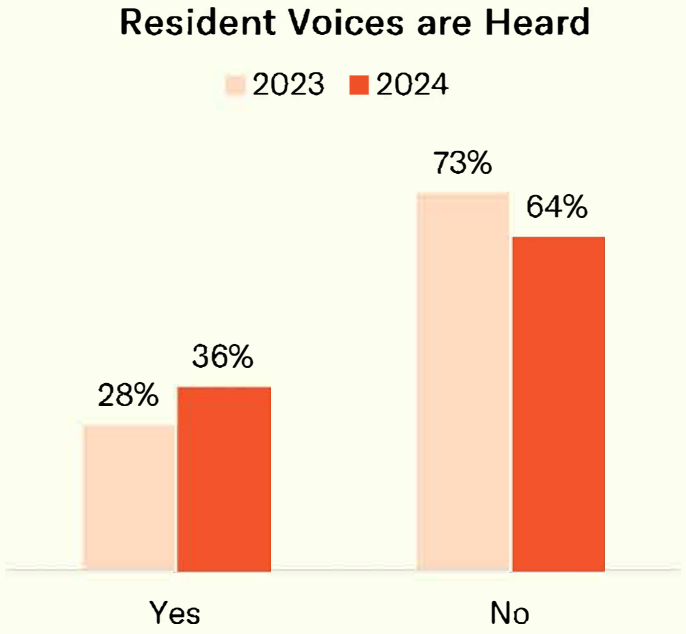
Although more residents still feel dissatisfied than satisfied, the ratio has improved markedly from last year. The proportion who feel at least somewhat satisfied with MLT's efforts to balance increased tourism with residents' needs improved to 31% from 22% in 2023, while dissatisfaction declined to 38% from 49% in the last year.



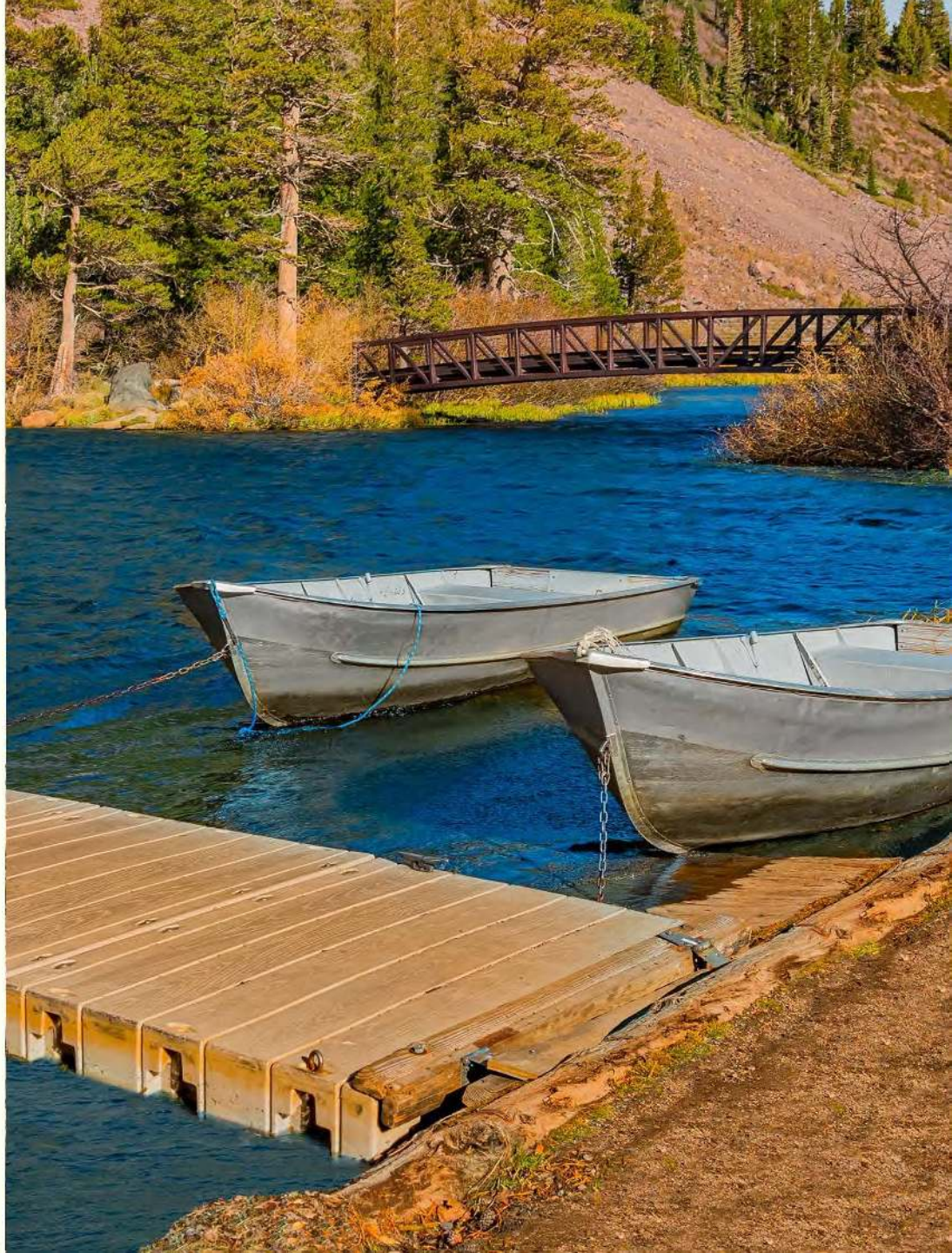
Question: How satisfied are you with Mammoth Lakes Tourism's efforts to balance with the needs of residents with driving tourism to the area?
Base Size: Total Respondents (2023: 258; 2024: 411).

Consistent with improved satisfaction with MLT's efforts, more residents now feel that MLT listens to their voices and ideas.

While the majority still feel unengaged, 36% of residents now feel that their voices/ideas are heard by MLT, up from 28% in 2023.



Question: Do you feel that the voices and ideas of residents are heard and taken into account when it comes to the management of tourism in Mammoth Lakes?
Base Size: Total Respondents (2023: 258; 2024: 411).



Survey respondents were asked an open-ended question: *"And what could Mammoth Lakes Tourism do to better listen and take into account your ideas?"*

The following pages share example responses that capture the community's sentiments. These are presented verbatim.

"Listen and take into account the needs of the local population. We currently do not have the infrastructure, housing or people to support more tourists. Most jobs in Mammoth do not pay a living wage."

Resident

"Consider the experience of the resident in outreach campaigns. Tourism is good but over-tourism is not. I don't think we need to keep posting on social media - "come to Mammoth" we need help increasing capacity and amenities in town to accommodate the current tourist load."

Resident

"Accept that STRs are hurting locals and the front end workers who are support our visitors. Service workers do not feel supported."

Resident

"Consider the need for more affordable housing and cost of living for locals. Programs that are available serve the poorest of the poor and completely ignore those who are lower to middle class. Families who want to move here to work in the town and support healthcare/school systems/outdoor rec are priced out or are unable to accept jobs. The stability of the town is tenuous and needs folks to be educated, taken care of and feel safe. This town exists on shaky ground."

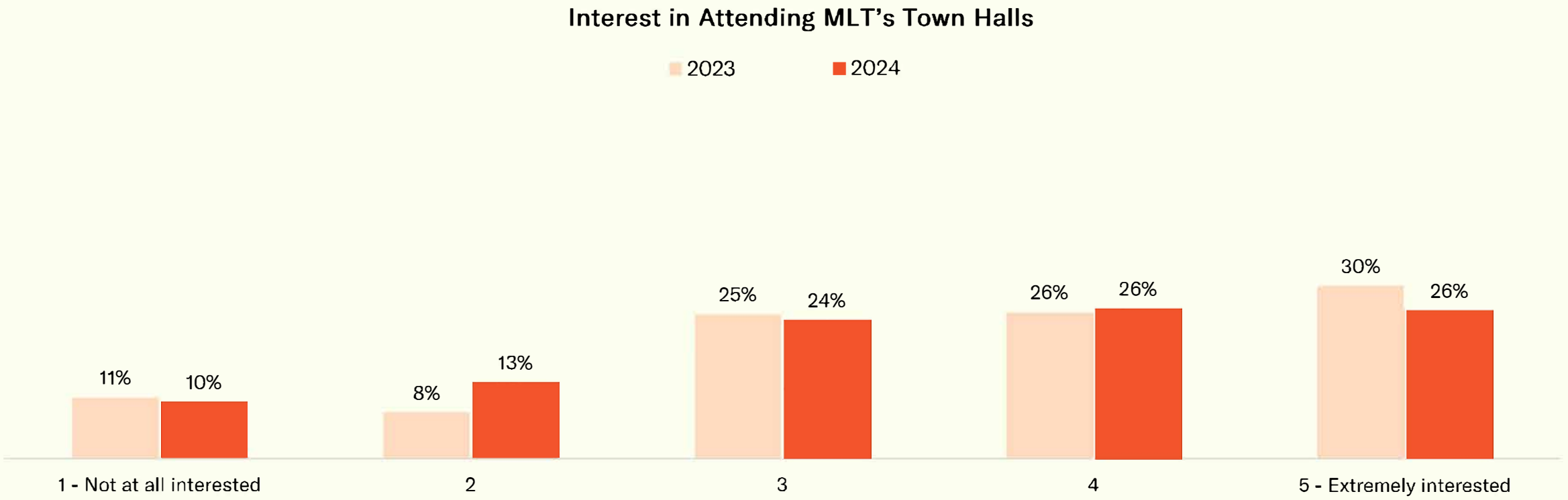
Resident

"I don't get excited about the idea of pushing non-peak tourism because I feel that is a fast track to burnout for many people. For service workers, getting crushed with hour long waits every week is brutal. I think it's important to have a bit of a shoulder season to breathe and catch up. For anyone doing maintenance, I also think shoulder season is important for maintaining equipment and structures. I use the off season for my business to fix trucks and equipment like a mad man. If I didn't have that time, it would be an emotional and financial burden. Having slower periods also allows locals to enjoy the small town lifestyle that this area projects. If it is constantly full of tourists it's no longer a small town, it's just an amusement park. You have to give people who live here a chance to enjoy it themselves. All of these points lead to burnout if they are neglected. So I guess I'd like a tourism board mentality that is focused almost solely on improving lives for locals rather than tourists for now. It doesn't have to be that way forever but I think in this moment, today, that tourists have a pretty sweet deal when visit. They have an abundance of places to stay, they have restaurants catering to them, they have free transportation throughout town, they have events catered to them, they have services specially designed around their agenda, and more. I'd like to see a shift in not improving those things for now, but rather how can we use those things to help locals catch up."

Business Owner

Interest in attending an MLT town hall remains similar to a year ago, with about half of residents being interested.

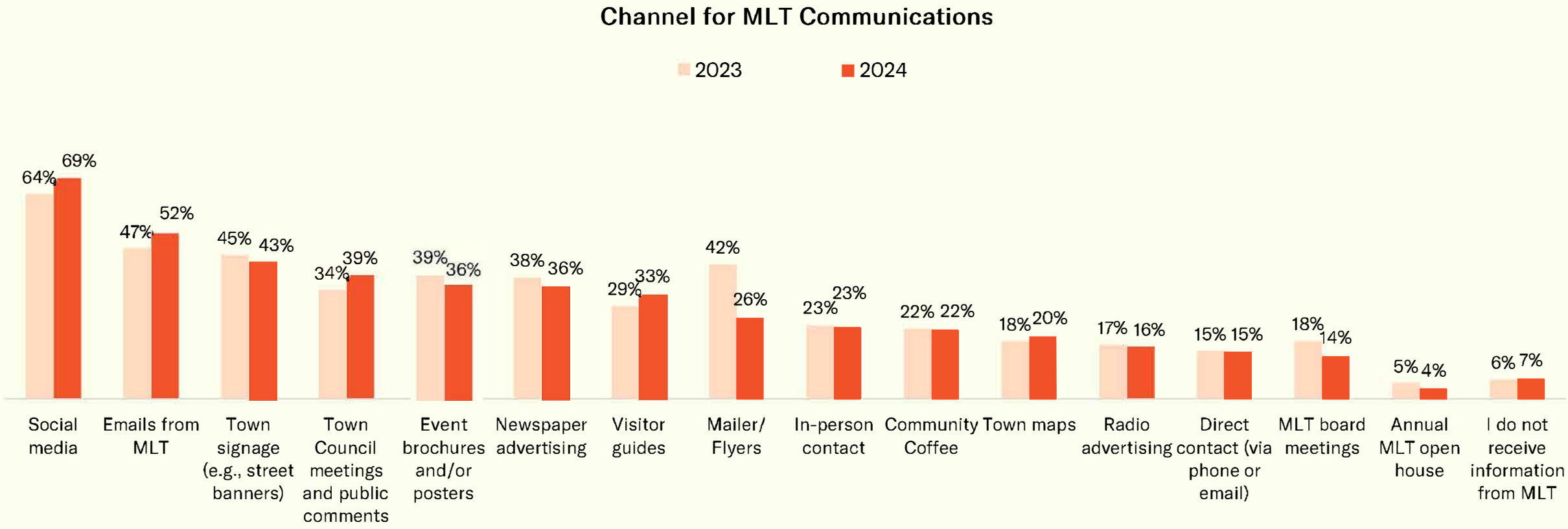
Resident survey respondents were asked to use a 5-point scale to indicate their interest in attending an MLT town hall where the organization hears from local residents. In 2024, 52% expressed strong interest (rating 4 or higher), which is a 4-point decline from 2023.



Question: How interested would you be in attending a town hall hosted by Mammoth Lakes Tourism where they hear from local residents?
Base Size: Total Respondents (2023: 258; 2024: 411).

Social media posts and emails remain the most common channels that residents receive Mammoth Lakes Tourism communications.

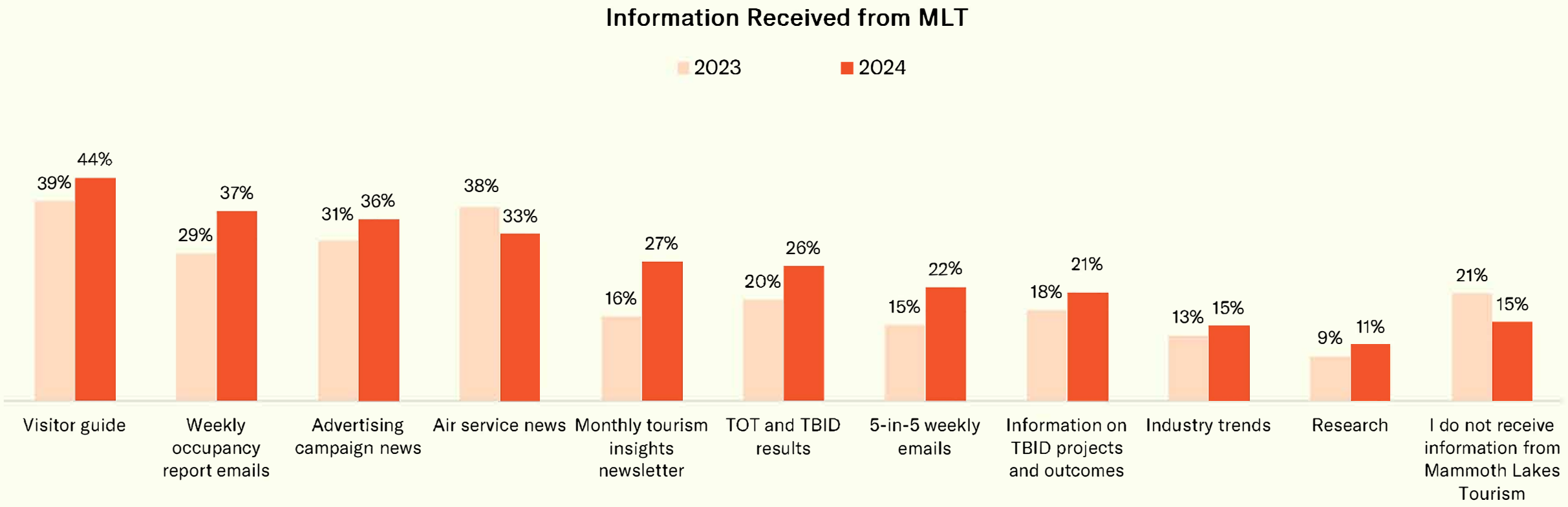
More residents now gather information via social media, emails, and/or town council meetings/comments than in 2023, each up by five percentage points in 2024. Meanwhile, usage of mailers/flyers drops notably (26% from 42%). All other channels shift relatively little.



Question: How do you receive information from Mammoth Lakes Tourism?
Base Size: Total Residents (2023: 258; 2024: 411).

The visitor guide remains the leading type of information residents report receiving from Mammoth Lakes Tourism.

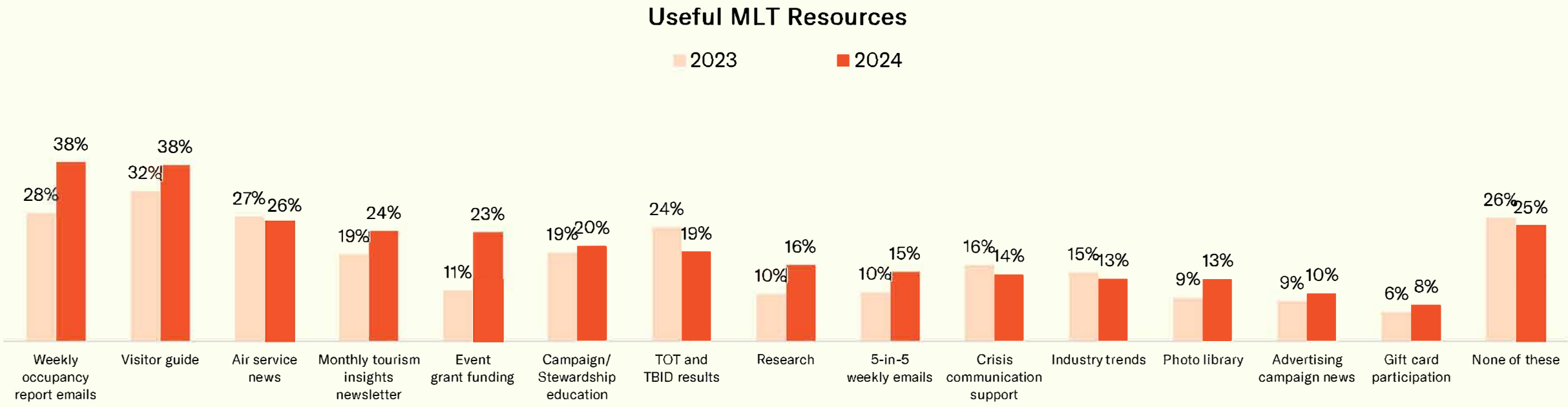
Climbing somewhat from 2023, residents report that the visitor guide still leads other information they receive from MLT (44% from 39%). More residents receive each type of information from MLT than a year ago, except for air service news (33% from 38%). Further, more residents recall receiving at least some information compared to a year ago (85% from 79%).



Question: What types of information do you receive from Mammoth Lakes Tourism?
Base Size: Respondents Receiving MLT Communications (2023: 243; 2024: 383).

Weekly occupancy reports and the visitor guide top all other resources in usefulness to residents.

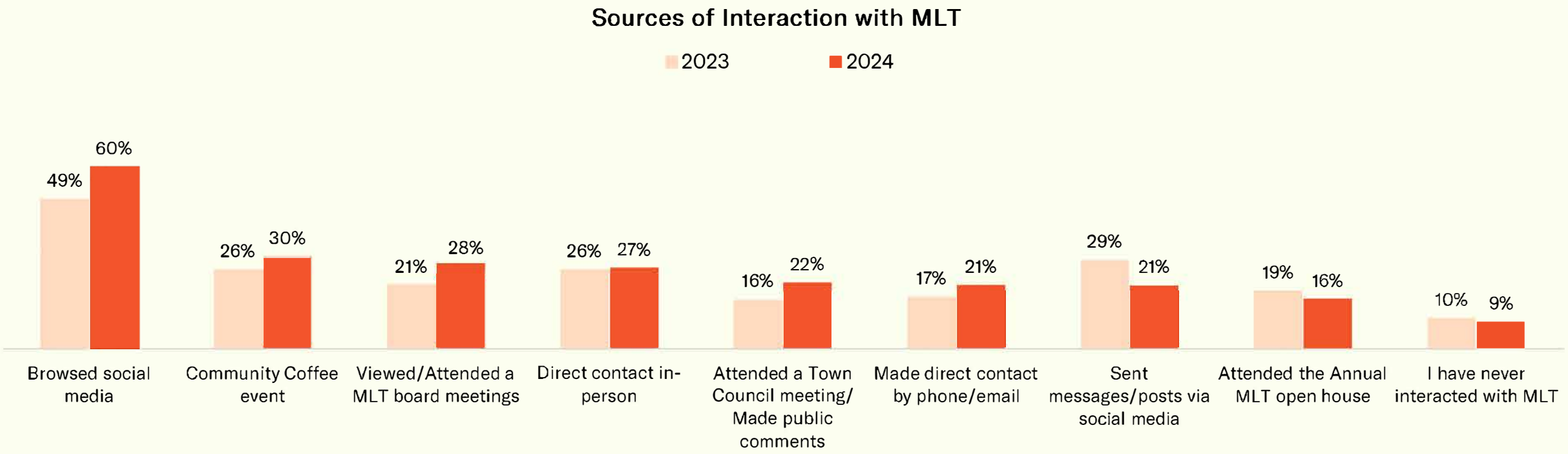
Occupancy data and the visitor guide dominate other resources in perceived usefulness to residents. These, plus air service news, led other resources from MLT in both 2024 and 2023.



Question: Which resources that Mammoth Lakes Tourism provides do you find useful? | Base Size: Total Respondents (2023: 258; 2024: 411).

Residents most commonly interact with Mammoth Lakes Tourism by browsing its social media content, up notably from 2023.

Twice as many residents interact with MLT by browsing social media than the next leading source, Community Coffee (60% vs. 30%), demonstrating the importance of these channels in communicating and engaging with the local community. Further, MLT's social media also shows the strongest growth in usage (60%, up from 49%) among the various types of interactions.

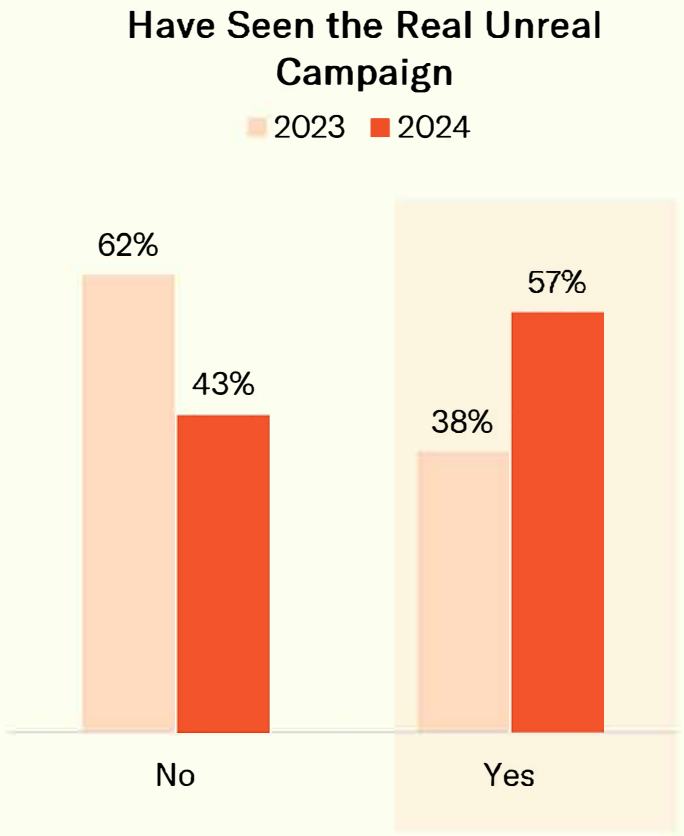


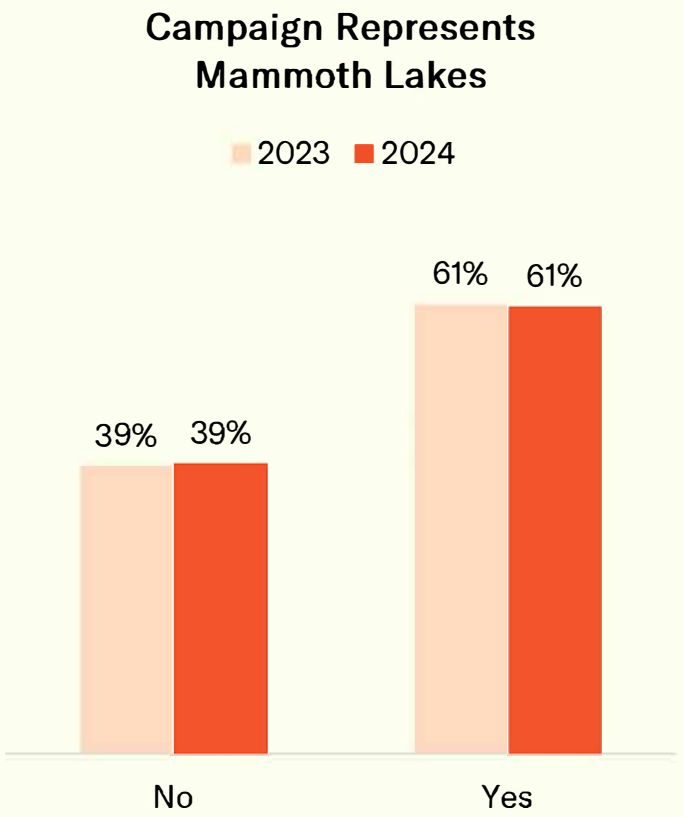
Question: How have you interacted with Mammoth Lakes Tourism?
Base Size: Total Respondents (2023: 258; 2024: 411).

A majority of residents have seen messaging/advertising for the Real Unreal campaign for Mammoth Lakes, far exceeding a year ago.

Substantially more residents have seen the Real Unreal Campaign in 2024 than in 2023, shifting to a majority from less than two-in-five (57% from 38%).

Three-in-five of those residents who have seen the campaign agree that it represents Mammoth Lakes in a way residents want to portray to visitors, unchanged from 2023.



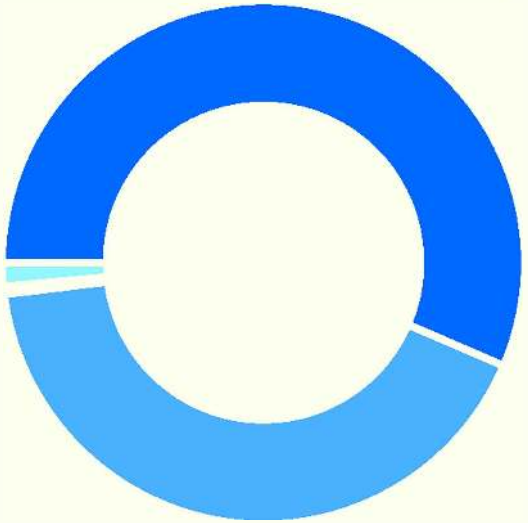


Question: Have you seen messaging or advertising about the Real Unreal campaign for Mammoth Lakes? | Do you think the Real Unreal campaign accurately represents the message that Mammoth Lakes residents want to send to visitors?
Base Size: Total Respondents (2023: 258; 2024: 411); Respondents Familiar with the Campaign (2023: 99; 2024: 234).

Appendix: Respondents Demographics

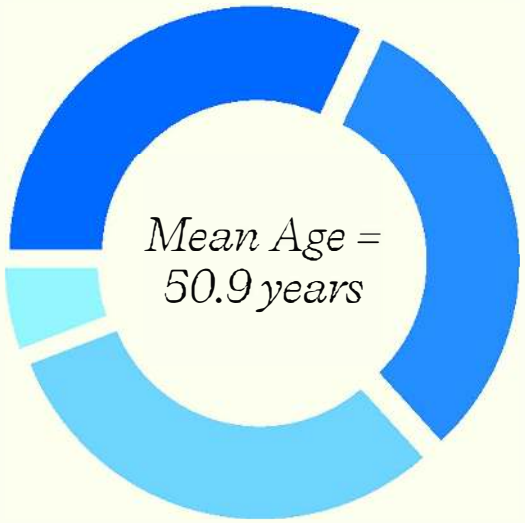
Respondents Demographics

Gender



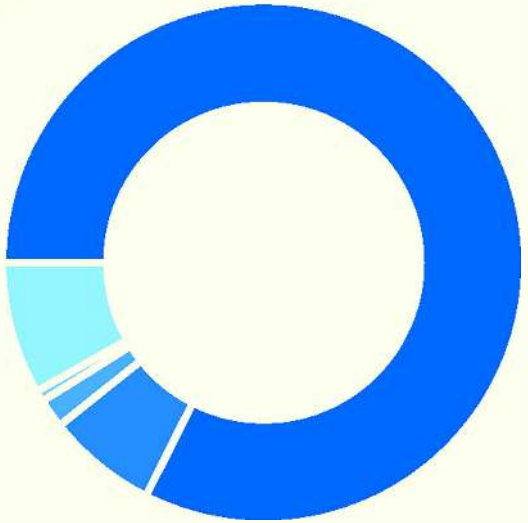
- Female, 56%
- Male, 42%
- Other, 1%

Generation



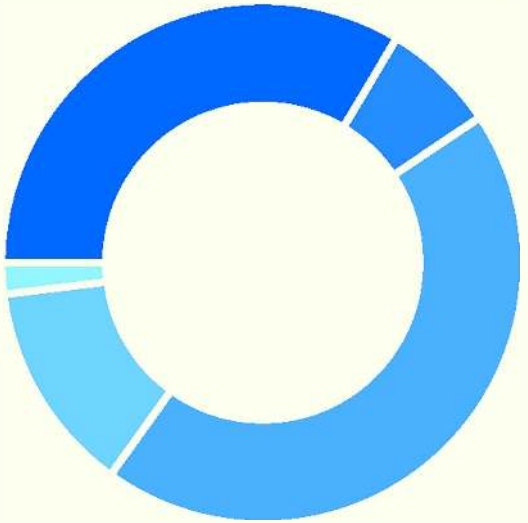
- Boomers+, 32%
- Gen X, 31%
- Millennials, 31%
- Gen Z, 6%

Ethnicity



- White, 88%
- Hispanic or Latino, 7%
- Asian, 2%
- Black or African American, 1%
- Other, 9%

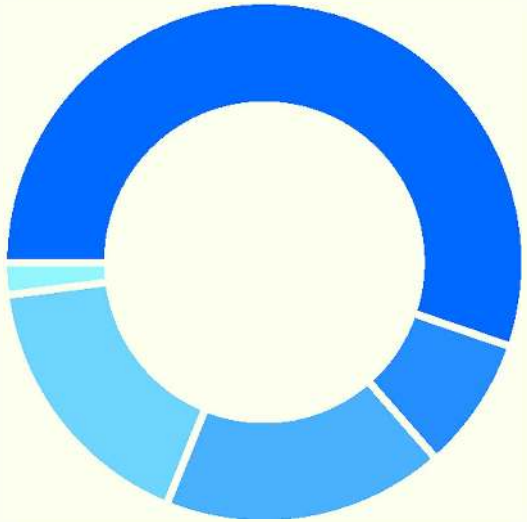
Education



- Graduate Degree, 34%
- Some Graduate School, 7%
- College Graduate, 44%
- Some College, 13%
- High School Graduate, 2%

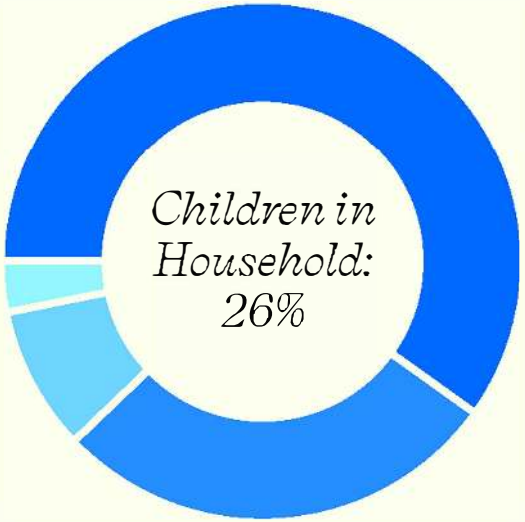
Respondents Demographics

Employment Status



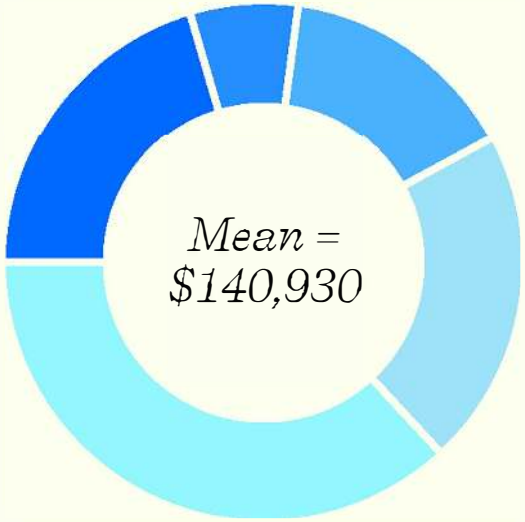
- Employed Full-Time, 55%
- Employed Part-Time, 8%
- Self-Employed, 18%
- Retired, 17%
- Unemployed, 2%

Marital Status



- Married, 60%
- Single, 28%
- Domestic Partnership, 9%
- Other, 3%

Household Income



- $250,000 or More, 20%
- $200,000 - $249,999, 7%
- $150,000 - $199,999, 15%
- $100,000 - $149,999, 21%
- $99,999 or Less, 37%

Mammoth Lakes Tourism
FY 2025-26 Town Deliverables

The FY 2025-26 deliverables reflect MLT's commitment to a community-first approach in representing the Town of Mammoth Lakes to our residents and visitors, and in maintaining our brand awareness in existing and emerging destination markets. Stewardship for residents, community and environment are paramount.

Purpose: Mammoth Lakes Tourism invites visitors to align with our community's values through the responsible promotion and stewardship of our mountain destination to bring economic vitality to Mammoth lakes.

Sustainable Revenue Generation

The Town of Mammoth Lakes continues to thrive as a tourism-based destination but not without challenges. Mammoth Lakes Tourism will work to maximize revenues for our businesses and the Town while being the leading voice of education, stewardship, and responsible travel. Balancing residents' quality of life, environmental protection and economic prosperity will be the ongoing focus. Considering housing and staffing challenges throughout the town, more people or 100% occupancy is no longer the goal; instead focus will be on enhancing the quality of life for our residents as well as the experience of our visitors while maximizing revenues and increasing need-time occupancy.

Overarching Organization Deliverables

A. Mammoth Lakes Tourism will remain nimble and flexible with the ability to shift messaging to best suit the needs of our community at any time based on market challenges and opportunities.
B. Community outreach and resident quality of life will continue to be a major focus including infrastructure enhancements in collaboration with TOML with funding assistance from MLT.
C. Education of our visitors to respect our residents, community and environment will be the focal point of our peak time messaging.
D. Coordinate with local entities to develop a comprehensive Destination Stewardship Plan.
E. Achieve $28m in TOT revenues for FY 2025-26 with 6 months at $2m+ and 5 months at $1m+. (based on apples-to-apples comparison excluding Measure L revenues)
F. Achieve $7.4m in TBID revenues for FY 2025-26 via filling need times, increased length of stay, and visitor spend.
G. Enplanement goals for FY 2025-26 of 4,000 at MMH and 11,000 at BIH

1. **Expand Community Engagement & Collaboration**
    A. Finalize and launch the Community Engagement Plan by July 2025 grounded in insights from Community Sentiment studies, JLLA research, Destination Think Collective findings, and case studies from other resort communities.
        - Continue to create and promote at least 12 (1 x month) in-person outreach events that meet the community in spaces funded by tourism dollars.
        - Continue tracking resident sentiment using current studies as a baseline, with the goal of increasing the residents who believe tourism makes Mammoth Lakes a better place to live from 42% to 46% and increasing awareness of the Real Unreal campaign from 57% to 65%.

    B. Participate in the development and implementation of the Destination Stewardship Plan with completion and adoption by June 30, 2026
    C. Explore implementing a program (like Copenpay in Denmark) for Summer 2026 that recognizes and rewards visitor and resident participation in stewardship-based initiatives.
    D. Launch a community awareness campaign by the end of 2025, to educate residents on how tourism dollars contribute to local improvements and quality of life in Mammoth Lakes.
    E. Collaborate and coordinate with the Town of Mammoth Lakes:
        - Work with TOML to add identified TBID-funded infrastructure projects to TOML's 5-year CIP by January 1, 2026, including but not limited to information kiosks, real-time transit information, and other needs cited by TBID remitters for visitor and resident benefit.
        - Collaborate with TOML on community messaging through resident-facing channels including deploying one "Did You Know" piece on TOT and TBID.
        - Participate in the TOML Parks & Recreation Master Plan Advisory Committee.

2. **Advance Destination Stewardship**
    A. Strengthen multi-agency partnerships and projects with entities like MLR, Mammoth Trails/TOML, and MMSA by collaborating on 1 new stewardship initiative that aligns with the in-market stewardship campaign and supplements Trashy Thursdays, Host Hounds, and the "It's a Mammoth Thing" video series.
    B. Expand website content by adding at least give new pieces focused on stewardship, local history, and culture to deepen community connection and visitor understanding.
    C. Maintain advertising creative ratings above 4.2 (excellent) for visitors inspired to keep Mammoth Lakes beautiful.
    D. Develop (1) new marketing initiative as it relates to the education of Mammoth Lakes history, culture, and/or heritage.

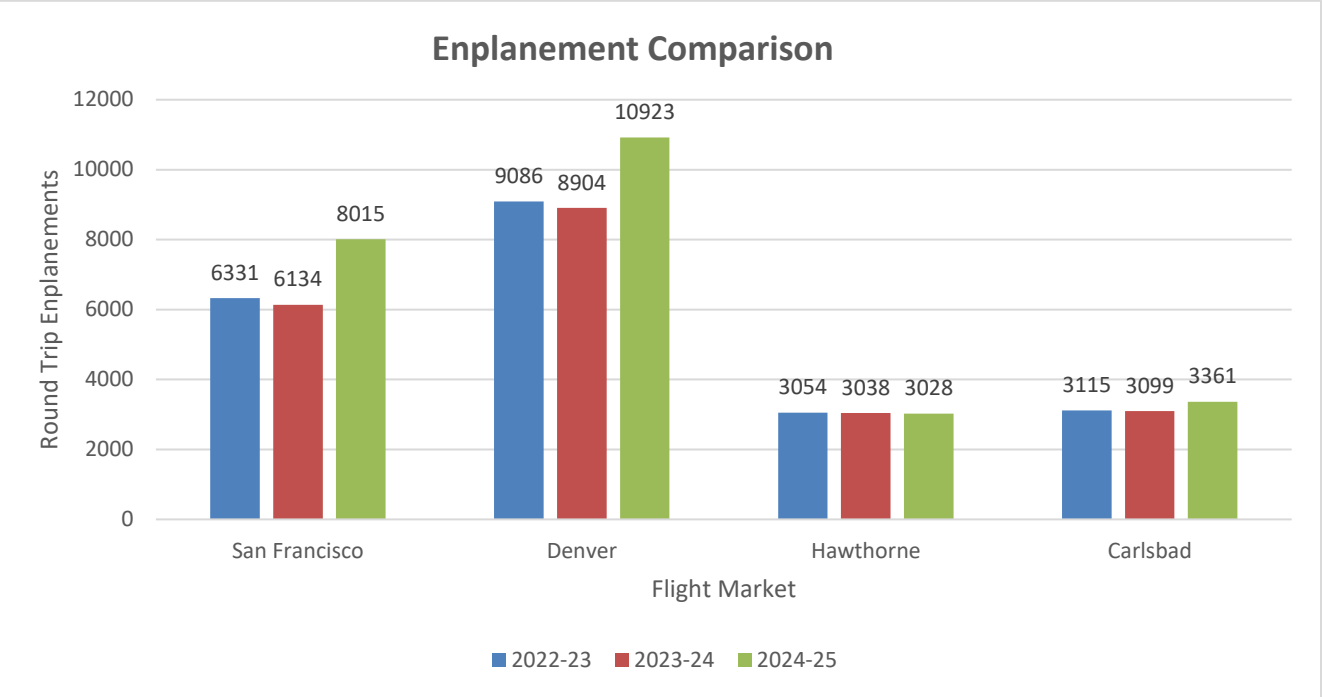
3. **Amplify Marketing & Promotion**
    A. Increase paid website sessions by 5% year over year.

B. Increase paid media air service referrals by 5% year over year.
C. Increase midweek/need period paid media placements by 50% (from 10 to 15).
D. Utilize geo-location data to establish a new year over year benchmark that tracks the number of Northeast-based visitors who were exposed to advertising and ultimately traveled to Mammoth Lakes.
E. Achieve 8K visits to the MLT events landing page during the first year of our paid advertising campaign for special events.
F. Increase social media audience by 5% year over year.
G. Increase website traffic by 5% percent year over year.
H. Grow newsletter database by 5% year over year.
I. Achieve an average open rate of 30% for newsletters both the community and consumer email lists.
J. Vet and coordinate 5-7 high-impact domestic media visits, targeting themes such as year-round travel, family travel, stewardship during non-peak times.
K. Represent MLT at 8-12 international trade and media sales missions / industry conferences to promote Mammoth Lakes as a California year-round destination.
L. Coordinate and host 7-10 high-impact international media placements with focus on Mammoth Lakes as a year-round California destination.

4. Leverage Partnerships

A. Engage with MLCC on initiatives to engage the local business community to increase understanding of TBID from 51% in the resident sentiment survey to 60%.
B. Coordinate on at least two Hispanic Business Association events.
C. Partner on (5) marketing initiatives with local partners with a goal of increasing TBID dollars to restaurants and retailers.
D. Utilizing our partnership with Tourism Economics, develop a communication plan to share critical data with the board and local partners on a quarterly basis.
E. Promote endurance season through hosting 8-10 athletes for Crib visits and collaborating with the Mammoth Track Club to focus on the Spartan Super World Championships and the upcoming 2028 L.A. Olympics.
F. Partner with Visit California on (1) collaborative paid media buy.
G. Re-enter the China market through 1-2 project-based opportunities in partnership with Visit California and The Alterra Mountain Company / MMSA.

Air Service Update 4-16-25



Year-over-year roundtrips

- Denver is up +2,019 which is +23% compared to last year at this time. (was +1,338 last month)
- San Francisco is up +1,881 which is +31% compared to last year at this time. (was +1,948 last month)
- Carlsbad is up +262, which is +8.5% compared to last year at this time. (was +123 last month)
- Hawthorne is down -10, which is flat to last year at this time. (was -123 last month)

Total we are up +4,152 round trips across all markets combined (+19.6%) – roughly +2,076 individual passengers

Last month we were up +3,289 round trips last month which was roughly +1,645 individual passengers

Total swing from last month is +863 round trips which is roughly +431 individual passengers

Summer

United summer is currently loaded and bookable for June 26 – September 1

Then limited-service September 4 – October 6 running 4-days-per-week Thursday, Friday, Sunday and Monday

Working to finalize a year-round schedule for Advanced Airlines (summer 2025 and winter 2025-26)

Mammoth Lakes Tourism Financial Report
April 16, 2025

Preliminary Transient Occupancy Tax (TOT)

- 13% TOT collections for February 2025 came in at $4,164,393 which is +$1,444,390 and +53% to budget
- YTD TOT rev. is $19,774,788 which is +$6,511,283 and +49% to Budget and +$481,385 and +2% to LY
- February TOT was -$177,858 and -4.1% to LY
- 2% Measure L collected for January 2025 = $510,718
- TOTAL TOT collections (combined 13% and 15%) for February 2025 were $4,675,111

Preliminary Tourism Business Improvement District (TBID)

- TBID collections for February 2025 came in at $1,019,193 which is -$105,807 and -9.4% to budget.
- YTD TBID revenue is $4,870,334 which is -$259,666 and -5.1% to Budget and +$126,358 and +2.7% to LY
- February TBID was -$56,319 and +5.2% to LY

	Pre-covid 2019	Feb. 2024	Feb. 2025	Budget	Diff to LY	Diff to Budget	
Lodging	$210,301	$330,644	$330,921	$335,000	+$277	-$4,079	-1.2%
Retail	$164,798	$178,493	$148,161	$210,000	-$30,332	-$63,839	-29.4%
Restaurant	$137,780	$189,390	$192,828	$200,000	+$3,438	-$7,172	-3.6%
Ski Area*	$275,004*	$376,986	$347,283	$380,000	-$29,703	-32,717	-8.6%

* This is not equal comparison as we have added .5% to MMSA (from 2% to 2.5%) and added golf

Bank Balances

- Measure A Checking account balance = $759,962.43
- Measure A Savings account balance = $5,023.22
- TBID Checking account balance = $882,322.09
- TBID Savings account balance = $5,018.49
- Special Events Checking account balance = $5,000.00

Certificate of Deposit Account Registry Service (CDARS)

CDARS are accounts in place because the FDIC only provides bank accounts with up to $250,000 in insurance if a bank fails and it is a way for us to protect our funds and make a small amount of interest.

- Measure A CDARS account balance = $468,738.38 (Value at maturity 5/1/25 = $470,201.44)
- Special Event CDARS account balance = $631,009.06 (Value at maturity 4/24/25 = $638,924.00*)
  *$350,000 will be transferred to Measure A checking to fund 2025 Events

Money Market Account

Balance of the FDIC Insured TBID Money Market account is $1,756,718.83

Tourism Reserve Fund

Estimated balance in the Town Council/MLT Tourism Reserve Account – tourism funds more than budgeted TOT.

- The current balance is $1,177,040

Profit and Loss Statements (P&L)

- Please let us know if you have any questions.

Transient Occupancy Tax

Collection through February 2025

1. TOT REVENUE COLLECTIONS by FISCAL year

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
2006-2007	633,290	718,371	404,545	240,541	275,921	1,455,122	1,694,967	1,583,253	1,249,350	765,323	241,871	363,886	9,626,441
YTD collection as % of Full Year	6.6%	14.0%	18.2%	20.7%	23.6%	38.7%	56.3%	72.8%	85.8%	93.7%	96.2%	100.0%	
2007-2008	690,020	850,958	382,541	191,090	202,902	1,533,030	1,926,497	1,890,372	1,731,631	612,581	245,108	410,409	10,667,140
YTD collection as % of Full Year	6.5%	14.4%	18.0%	19.8%	21.7%	36.1%	54.2%	71.9%	88.1%	93.9%	96.2%	100.0%	
2008-2009	726,465	973,679	379,849	232,427	247,085	1,591,709	1,561,523	1,477,336	1,028,558	774,003	299,287	364,787	9,656,710
YTD collection as % of Full Year	7.5%	17.6%	21.5%	23.9%	26.5%	43.0%	59.2%	74.5%	85.1%	93.1%	96.2%	100.0%	
2009-2010	745,522	866,044	421,313	210,599	207,989	1,735,454	1,680,851	1,687,536	1,263,038	971,363	303,667	383,274	10,476,648
YTD collection as % of Full Year	7.1%	15.4%	19.4%	21.4%	23.4%	40.0%	56.0%	72.1%	84.2%	93.4%	96.3%	100.0%	
2010-2011	833,692	934,572	471,581	229,609	302,314	1,948,908	1,685,322	1,672,809	1,338,133	985,285	355,833	451,080	11,209,138
YTD collection as % of Full Year	7.4%	15.8%	20.0%	22.0%	24.7%	42.1%	57.1%	72.1%	84.0%	92.8%	96.0%	100.0%	
2011-2012	947,459	1,061,627	566,993	276,436	314,244	1,666,408	1,042,470	1,213,076	1,193,988	753,998	307,818	536,020	9,880,538
YTD collection as % of Full Year	9.6%	20.3%	26.1%	28.9%	32.1%	48.9%	59.5%	71.7%	83.8%	91.5%	94.6%	100.0%	
2012-2013	1,035,276	1,101,555	569,118	287,742	286,349	1,758,887	1,856,579	1,703,985	1,426,186	683,196	392,990	613,159	11,715,023
YTD collection as % of Full Year	8.8%	18.2%	23.1%	25.6%	28.0%	43.0%	58.9%	73.4%	85.6%	91.4%	94.8%	100.0%	
2013-2014	1,075,023	1,134,699	533,790	306,359	317,763	1,620,490	1,284,026	1,174,950	1,205,504	662,531	376,019	672,104	10,363,258
YTD collection as % of Full Year	10.4%	21.3%	26.5%	29.4%	32.5%	48.1%	60.5%	71.9%	83.5%	89.9%	93.5%	100.0%	
2014-2015	1,175,232	1,261,290	614,628	378,296	326,836	1,815,044	1,659,854	1,451,851	1,015,507	459,664	377,564	773,232	11,308,997
YTD collection as % of Full Year	10.4%	21.5%	27.0%	30.3%	33.2%	49.3%	63.9%	76.8%	85.8%	89.8%	93.2%	100.0%	
2015-2016	1,414,925	1,323,904	782,030	470,450	589,215	2,282,317	2,371,826	2,238,590	1,897,371	830,614	526,861	1,005,404	15,733,507
YTD collection as % of Full Year	9.0%	17.4%	22.4%	25.4%	29.1%	43.6%	58.7%	72.9%	85.0%	90.3%	93.6%	100.0%	
2016-2017	1,716,610	1,535,475	1,004,815	567,405	534,223	2,370,978	2,656,510	2,475,292	2,030,473	1,599,673	673,512	926,497	18,091,464
YTD collection as % of Full Year	9.5%	18.0%	23.5%	26.7%	29.6%	42.7%	57.4%	71.1%	82.3%	91.2%	94.9%	100.0%	
2017-2018	1,753,735	1,570,110	1,050,037	612,877	601,343	2,362,405	2,515,665	2,168,214	2,351,036	1,242,482	608,463	1,031,033	17,867,401
YTD collection as % of Full Year	9.8%	18.6%	24.5%	27.9%	31.3%	44.5%	58.6%	70.7%	83.9%	90.8%	94.2%	100.0%	
2018-2019	1,771,072	1,512,891	1,001,297	635,580	591,548	2,665,867	3,074,472	2,724,480	2,604,882	1,755,830	774,268	1,098,874	20,211,061
YTD collection as % of Full Year	8.8%	16.2%	21.2%	24.3%	27.3%	40.5%	55.7%	69.2%	82.0%	90.7%	94.6%	100.0%	
2019-2020	1,893,473	1,740,322	1,068,779	747,888	629,410	2,832,607	3,113,743	2,665,842	846,251	15,748	12,529	407,657	15,974,248
YTD collection as % of Full Year	11.9%	10.9%	6.7%	4.7%	3.9%	17.7%	19.5%	16.7%	5.3%	0.1%	0.1%	2.6%	
2020-2021	1,911,690	1,899,279	661,158	676,433	965,183	295,144	717,028	2,553,572	2,639,695	1,758,757	902,961	1,529,442	16,510,344
YTD collection as % of Full Year	11.6%	11.5%	4.0%	4.1%	5.8%	1.8%	4.3%	15.5%	16.0%	10.7%	5.5%	9.3%	
2021-2022	2,545,344	1,885,522	830,401	867,594	1,373,610	4,005,956	4,364,765	3,831,274	2,996,102	1,643,021	843,556	1,481,383	26,668,528
YTD collection as % of Full Year	9.5%	7.1%	3.1%	3.3%	5.2%	15.0%	16.4%	14.4%	11.2%	6.2%	3.2%	5.6%	
2022-2023	2,237,227	1,762,533	1,235,431	901,599	1,359,639	4,437,213	4,894,122	4,119,721	3,237,433	2,778,354	1,292,309	1,265,161	29,520,742
YTD collection as % of Full Year	7.6%	6.0%	4.2%	3.1%	4.6%	15.0%	16.6%	14.0%	11.0%	9.4%	4.4%	4.3%	
2023-2024	2,187,703	1,930,667	1,444,953	1,059,538	1,017,293	3,221,049	4,089,949	4,342,251	3,774,158	2,171,658	926,667	1,257,382	27,423,267
YTD collection as % of Full Year	8.0%	7.0%	5.3%	3.9%	3.7%	11.7%	14.9%	15.8%	13.8%	7.9%	3.4%	4.6%	
2024-2025	2,274,839	1,960,670	1,290,607	1,014,496	919,486	3,776,853	4,373,444	4,164,393	-	-	-	-	19,774,788
YTD collection as % of Full Year	11.5%	9.9%	6.5%	5.1%	4.6%	19.1%	22.1%	21.1%	0.0%	0.0%	0.0%	0.0%	
% change from prior year	***4.0%***	***1.6%***	***-10.7%***	***-4.3%***	***-9.6%***	***17.3%***	***6.9%***	***-4.1%***	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***-27.9%***
Average monthly collection prior 3 yrs	2,323,425	1,859,574	1,170,262	942,910	1,250,181	3,888,073	4,449,612	4,097,749	3,335,898	2,197,678	1,020,844	1,334,642	27,870,846
Average Monthly collection as % of Full Year	8.3%	6.7%	4.2%	3.4%	4.5%	14.0%	16.0%	14.7%	12.0%	7.9%	3.7%	4.8%	100.0%
Average YTD collection as % of Full Year	8.3%	15.0%	19.2%	22.6%	27.1%	41.0%	57.0%	71.7%	83.7%	91.5%	95.2%	100.0%	

2. TOT Budget and Estimates (FY 2024-2025)

			Estimated Reserves (*)	Actual Reserves
FY 24-25 BUDGETED full-year revenue	Rate	**18,500,000**		
less Tourism	18.08%	3,344,000	$ 1,177,040	$ 230,442
less Housing	6.54%	1,209,615	$ 425,738	$ 83,352
less Transit	6.54%	1,209,615	$ 425,738	$ 83,352
Net to Town's General Fund		**12,736,769**		

* Based on performance to budget YTD, final reserve account balances will be determined by actual performance to budget at completion of Fiscal Year

	Quarter Total:	3,553,386		Quarter Total:	4,036,554		Quarter Total:	7,887,866		Quarter Total:	3,022,194	18,500,000
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Full-Yr Total
FY 24-25 Budgeted Monthly Revenue	$ 1,542,242	$ 1,234,348	$ 776,796	$ 625,885	$ 829,845	$ 2,580,824	$ 2,953,562	$ 2,720,003	$ 2,214,301	$ 1,458,774	$ 677,600	$ 885,820	**18,500,000**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
FY 24-25 Actual Collection	2,274,839	1,960,670	1,290,607	1,014,496	919,486	3,776,853	4,373,444	4,164,393	-	-	-	-	**19,774,788**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
FY 24-25 Differences: Budget vs Actuals YTD	732,597	726,322	513,811	388,611	89,641	1,196,029	1,419,882	1,444,390	-	-	-	-	**6,511,283**
Percent Over/(Under) Budget	48%	59%	66%	62%	11%	46%	48%	53%					35%

Cumulative difference to date:	**6,511,283**	**49%**
Cumulative actual to last year actual difference to date:	**481,385**	**2%**

Transient Occupancy Tax

Collection through February 2025

1. TOT REVENUE COLLECTIONS by FISCAL year

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
2024-2025 - Year 1	-	-	-	-	-	-	342,625	510,718	-	-	-	-	853,343
YTD collection as % of Full Year	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.2%	59.8%	0.0%	0.0%	0.0%	0.0%	
2025-2026 - Year 2	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2026-2027 - Year 3	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2027-2028 - Year 4	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2028-2029 - Year 5	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2029-2030 - Year 6	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2030-2031 - Year 7	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2031-2032 - Year 8	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2032-2033 - Year 9	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
2033-2034 - Year 10	-	-					-	-	-	-	-	-	-
YTD collection as % of Full Year	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
% change from prior year	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***
Average monthly collection prior 3 yrs	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	342,625	510,718	-	-	-	-	853,343
Average Monthly collection as % of Full Year													
Average YTD collection as % of Full Year													

2. TOT Budget and Estimates - Measure L (FY 2024-2025)

	Quarter Total:		-		Quarter Total:	-		Quarter Total:	1,100,000		Quarter Total:	470,000	1,570,000
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Full-Yr Total
FY 24-25 Budgeted Monthly Revenue	$ -	$ -	$ -	$ -	$ -	$ -	$ 340,000	$ 420,000	$ 340,000	$ 225,000	$ 105,000	$ 140,000	**1,570,000**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
FY 24-25 Actual Collection	-	-	-	-	-	-	342,625	510,718	-	-	-	-	**853,343**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
FY 24-25 Differences: Budget vs Actuals YTD			-	-	-	-	2,625	90,718	-	-	-	-	**93,343**

Cumulative actual to last year actual difference to date: **0%**

Estimated TBID Revenue Fiscal 2024-25

LODGING ALL	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL	% of Total	
Est. TOT Revenue	$2,275,000	$1,950,000	$1,365,000	$1,040,000	$1,040,000	$3,770,000	$4,225,000	$4,355,000	$3,770,000	$2,080,000	$1,105,000	$1,300,000	$28,275,000		
Actual Total Revenue	$16,416,805	$14,920,601	$9,702,890	$7,670,919	$7,122,800	$28,691,600	$31,589,239	$33,092,117	$0	$0	$0	$0	$149,206,971		
Est. Total Revenue	$17,500,000	$15,000,000	$10,500,000	$8,000,000	$8,000,000	$29,000,000	$32,500,000	$33,500,000	$29,000,000	$16,000,000	$8,500,000	$10,000,000	$217,500,000		
Est. TBID Revenue @1%	**$175,000**	**$150,000**	**$105,000**	**$80,000**	**$80,000**	**$290,000**	**$325,000**	**$335,000**	**$290,000**	**$160,000**	**$85,000**	**$100,000**	**$2,175,000**	30.2%	Budget
Actual Revenue	**$164,168**	**$149,206**	**$97,029**	**$76,709**	**$71,228**	**$286,916**	**$315,892**	**$330,921**					**$1,492,070**	30.6%	Actual
$ Change Bud to Act	**($10,832)**	**($794)**	**($7,971)**	**($3,291)**	**($8,772)**	**($3,084)**	**($9,108)**	**($4,079)**	**($290,000)**	**($160,000)**	**($85,000)**	**($100,000)**	**($682,930)**		
% Change Bud to Act	**-6.19%**	**-0.53%**	**-7.59%**	**-4.11%**	**-10.97%**	**-1.06%**	**-2.80%**	**-1.22%**	**-100.00%**	**-100.00%**	**-100.00%**	**-100.00%**	**-31.40%**		
Cummulative Act to Bud	**($10,832)**	**($11,626)**	**($19,597)**	**($22,888)**	**($31,660)**	**($34,744)**	**($43,851)**	**($47,930)**	**($337,930)**	**($497,930)**	**($582,930)**	**($682,930)**			

Retail	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL		
Est. Total Revenue	$9,333,333	$8,666,667	$6,000,000	$4,666,667	$7,000,000	$15,000,000	$14,000,000	$14,000,000	$12,333,333	$8,333,333	$5,666,667	$7,666,667	$112,666,667		
Actual Total Revenue	$8,745,483	$7,447,073	$4,920,206	$3,935,303	$5,878,665	$11,366,600	$12,849,673	$9,877,408	$0	$0	$0	$0	$65,020,411		
Est. TBID Revenue @ 1.5%	**$140,000**	**$130,000**	**$90,000**	**$70,000**	**$105,000**	**$225,000**	**$210,000**	**$210,000**	**$185,000**	**$125,000**	**$85,000**	**$115,000**	**$1,690,000**	23.5%	Budget
Actual Revenue	**$131,182**	**$111,706**	**$73,803**	**$59,030**	**$88,180**	**$170,499**	**$192,745**	**$148,161**					**$975,306**	20.0%	Actual
$ Change Bud to Act	**($8,818)**	**($18,294)**	**($16,197)**	**($10,970)**	**($16,820)**	**($54,501)**	**($17,255)**	**($61,839)**	**($185,000)**	**($125,000)**	**($85,000)**	**($115,000)**			
% Change Bud to Act	**-6.30%**	**-14.07%**	**-18.00%**	**-15.67%**	**-16.02%**	**-24.22%**	**-8.22%**	**-29.45%**	**-100.00%**	**-100.00%**	**-100.00%**	**-100.00%**	**-42.29%**		
Cummulative Act to Bud	**($8,818)**	**($27,112)**	**($43,309)**	**($54,279)**	**($71,099)**	**($125,600)**	**($142,855)**	**($204,694)**	**($389,694)**	**($514,694)**	**($599,694)**	**($714,694)**			

Restaurant	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL		
Est. Total Revenue	$8,666,667	$7,333,333	$5,666,667	$4,000,000	$6,333,333	$11,666,667	$11,666,667	$13,333,333	$12,000,000	$7,666,667	$4,000,000	$5,333,333	$97,666,667		
Actual Total Revenue	$7,696,437	$7,497,490	$5,140,348	$4,063,195	$5,200,785	$11,165,000	$11,946,465	$12,855,179	$0	$0	$0	$0	$65,564,899		
Est. TBID Revenue @1.5%	**$130,000**	**$110,000**	**$85,000**	**$60,000**	**$95,000**	**$175,000**	**$175,000**	**$200,000**	**$180,000**	**$115,000**	**$60,000**	**$80,000**	**$1,465,000**	20.3%	Budget
Actual Revenue	**$115,447**	**$112,462**	**$77,105**	**$60,948**	**$78,012**	**$167,475**	**$179,197**	**$192,828**					**$983,473**	20.2%	Actual
$ Change Bud to Act	**($14,553)**	**$2,462**	**($7,895)**	**$948**	**($16,988)**	**($7,525)**	**$4,197**	**($7,172)**	**($180,000)**	**($115,000)**	**($60,000)**	**($80,000)**			
% Change Bud to Act	**-11.19%**	**2.24%**	**-9.29%**	**1.58%**	**-17.88%**	**-4.30%**	**2.40%**	**-3.59%**	**-100.00%**	**-100.00%**	**-100.00%**	**-100.00%**	**-32.87%**		
Cummulative Act to Bud	**($14,553)**	**($12,091)**	**($19,986)**	**($19,038)**	**($36,026)**	**($43,551)**	**($39,354)**	**($46,527)**	**($226,527)**	**($341,527)**	**($401,527)**	**($481,527)**			

MMSA Lift & Ski School	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL		
Est. Total Revenue	$1,200,000	$1,000,000	$2,200,000	$2,000,000	$5,800,000	$12,600,000	$15,200,000	$15,200,000	$12,000,000	$5,000,000	$1,400,000	$1,200,000	$74,800,000		
Actual Total Revenue	$2,207,900	$2,988,911	$172,640	$1,238,330	$5,320,653	$15,302,680	$15,656,940	$13,891,335	$0	$0	$0	$0	$56,779,389		
Est. TBID Revenue @2.5%	**$30,000**	**$25,000**	**$55,000**	**$50,000**	**$145,000**	**$315,000**	**$380,000**	**$380,000**	**$300,000**	**$125,000**	**$35,000**	**$30,000**	**$1,870,000**	26.0%	Budget
Actual Revenue	**$55,197**	**$74,723**	**$4,316**	**$30,958**	**$133,016**	**$382,567**	**$391,424**	**$347,283**					**$1,419,485**	29.1%	Actual
$ Change Bud to Act	**$25,197**	**$49,723**	**($50,684)**	**($19,042)**	**($11,984)**	**$67,567**	**$11,424**	**($32,717)**	**($300,000)**	**($125,000)**	**($35,000)**	**($30,000)**			
% Change Bud to Act	**83.99%**	**198.89%**	**-92.15%**	**-38.08%**	**-8.26%**	**21.45%**	**3.01%**	**-8.61%**	**-100.00%**	**-100.00%**	**-100.00%**	**-100.00%**	**-24.09%**		
Cummulative Act to Bud	**$25,197**	**$74,920**	**$24,236**	**$5,195**	**($6,789)**	**$60,778**	**$72,201**	**$39,485**	**($260,515)**	**($385,515)**	**($420,515)**	**($450,515)**			

Monthly TBID Rev Budget	$475,000	$415,000	$335,000	$260,000	$425,000	$1,005,000	$1,090,000	$1,125,000	$955,000	$525,000	$265,000	$325,000	**$7,200,000**
ACTUALS by Month	$465,994	$448,097	$252,253	$227,645	$370,436	$1,007,457	$1,079,258	$1,019,193	$0	$0	$0	$0	**$4,870,334**
Budget vs. Actual	**($9,006)**	**$33,097**	**($82,747)**	**($32,355)**	**($54,564)**	**$2,457**	**($10,742)**	**($105,807)**	**($955,000)**	**($525,000)**	**($265,000)**	**($325,000)**	**($2,329,666)**
% Difference Budget to Actual	-1.90%	7.98%	-24.70%	-12.44%	-12.84%	0.24%	-0.99%	-9.41%	-100.00%	-100.00%	-100.00%	-100.00%	-32.36%
Cumulative Budget $$$	$475,000	$890,000	$1,225,000	$1,485,000	$1,910,000	$2,915,000	$4,005,000	$5,130,000	$6,085,000	$6,610,000	$6,875,000	$7,200,000	
YTD Actual Cumulative $$$	$465,994	$914,092	$1,166,345	$1,393,990	$1,764,426	$2,771,883	$3,851,141	$4,870,334	$4,870,334	$4,870,334	$4,870,334	$4,870,334	
Cumm Diff Budget to Actual	**($9,006)**	**$24,092**	**($58,655)**	**($91,010)**	**($145,574)**	**($143,117)**	**($153,859)**	**($259,666)**	**($1,214,666)**	**($1,739,666)**	**($2,004,666)**	**($2,329,666)**	
% Difference to Actual	-1.90%	2.71%	-4.79%	-6.13%	-7.62%	-4.91%	-3.84%	-5.06%	-19.96%	-26.32%	-29.16%	-32.36%	
Actual 2023-24	$436,316	$380,501	$324,510	$249,732	$387,281	$857,907	$1,032,218	$1,075,512	$894,616	$508,979	$242,902	$294,650	$6,685,122
$ Difference YOY	$29,678	$67,596	($72,256)	($22,087)	($16,845)	$149,550	$47,040	($56,319)	($894,616)	($508,979)	($242,902)	($294,650)	
% Difference YOY	6.80%	17.77%	-22.27%	-8.84%	-4.35%	17.43%	4.56%	-5.24%	-100.00%	-100.00%	-100.00%	-100.00%	
LY Cummulative	$436,316	$816,817	$1,141,327	$1,391,058	$1,778,340	$2,636,247	$3,668,464	$4,743,976	$5,638,592	$6,147,571	$6,390,473	$6,685,122	
Cumulative YOY $ Change	**$29,678**	**$97,274**	**$25,018**	**$2,931**	**($13,914)**	**$135,636**	**$182,677**	**$126,358**	**($768,258)**	**($1,277,237)**	**($1,520,139)**	**($1,814,788)**	
Cummulative % Diff YOY	6.80%	11.91%	2.19%	0.21%	-0.78%	5.15%	4.98%	2.66%	-13.62%	-20.78%	-23.79%	-27.15%	

April 2025 International Visitor Sentiment and Trends for Summer / Fall 2025

This is a brief recap of international market intelligence from Visit California and our 7 international offices on the trends they are seeing regarding travel to the USA in 2025, and California specifically

VISIT CALIFORNIA

- Aggressively promoting California welcoming culture: "All Dreams Welcome"
- Increasing spend in key markets affected by the policies from the Trump Administration (Canada, Mexico, France, Germany, China, UK)
- Leaning into the "California isn't-Washington D.C. space" with a direct message from Gov. Newsome to Canadians

GERMANY

- After a strong start for USA and California bookings from November to January we have seen a decline in February and March
- Reports from most key tour operators that new bookings for summer and fall are slowing down.
- A decline of around 10% happening this year and hopefully due to 2026 world cup a rise again in 2026
- one positive side effect for travelers to the USA happened in the last 2 weeks - the US$ got substantially weaker and the Euro buys 0,10 Cent more US$ than earlier this year.

FRANCE

- Booking challenges included confusion around Yosemite National Park's reservation system—a source of frustration and hesitancy in itinerary planning.
- Overall U.S. bookings are declining, though cancellations have not materialized. Canada is rising as a competitor for outdoor experiences.
- Media remain enthusiastic about covering California and see it as offering distinctive, "Only in California" stories.
- Opportunities include positioning California as distinct from the U.S. through storytelling that highlights local culture, sustainability, and seasonal travel. Road trips remain a winning angle—consider escorted options where language may be a barrier.

UNITED KINGDOM (UK)

- It's a hyper competitive market and Brits have a lot of choice, with many U.S destinations investing heavily in the market, alongside competitively priced destinations in Asia.
- media news headlines are, on the whole, negative towards Trump and the U.S. The focus has shifted from just being political news to highlighting how tourists to the U.S are now affected
- However, media headlines aren't the whole story and that Brits tend to be quite resilient and less sensitive to sensational headlines
- Tour ops are reporting a mixed bag - luxury operators have seen strong Q1 bookings for California, others are seeing a softening in searches or drop in US searches and bookings in March
    - BA reported on Friday (11th April) that premium cabins for bookings to SFO, LAX & SAN are holding up well. They are optimistic about their upcoming May sale
    - With Canadians not travelling hotels are dropping their prices, which is making California more attractive to Brits
    - Data from Brand USA at the start of April showed that likelihood to travel to the US remains fairly constant, with no drop off on 'likelihood to visit US from UK'
    - Ben Ross, The Telegraph's Head of Travel, confirmed that their website metrics show readers remain strongly invested in America and they haven't seen a drop-off in reading of US articles

- US has become incredibly costly over the last few years, but we seeing a change of wind with the XE rate going in our favor, whilst other destinations, such as British favorites France & Italy, are becoming more expensive with the Euro XE rate
- Lots of excitement building for USA events, such as the FIFA World Cup and Olympics - we have a HUGE opportunity in this market in particular with the World Cup, so we really recommend capitalizing on this global excitement and leveraging the increased media attention

NORDICS

- Scandinavian Tour Operators are reporting a decline in search and forward bookings for Summer 2026 is down by 20-30%
- SAS and other airlines, starts to see decline YOY in corporate travel for the coming 6 months
- The media has softened a bit on USA and travel to the US over the weekend which is good news

AUSTRALIA / NEW ZEALAND

- Australians separate politics from travel. While political headlines in the U.S. are prominent, they are not a major deterrent to travel. Australians have shown they can compartmentalize politics and still pursue holidays that offer value, culture, and adventure.
- California is perceived as more welcoming. Brand tracking shows California consistently outperforms other U.S. states on emotional attributes like "diverse," "inclusive," and "welcoming." This perception reinforces California's appeal as a destination that reflects shared values.
- Economic factors outweigh political ones. While tariffs and politics receive media attention, the biggest barriers for Australians are the weaker exchange rate and overall trip cost. Value, not values, is the primary decision driver right now.
- The FIFA World Cup will be a major visitation driver. The 2022 Qatar World Cup attracted 3.4 million spectators, including over 1 million international visitors (FIFA). California will host matches in both Los Angeles and the Bay Area in 2026, and the Governor has forecast more than $1.2 billion in economic impact, with $594M in LA County and $630M in the Bay Area.

INDIA

- The outlook remains highly positive. The USA is one of the most aspirational destinations for Indian travelers. Demand for travel to the U.S. continues to be strong, with California retaining its position as the most popular state for Indian travelers.
- In 2024, California received **579,000 Indian visitors ,** who spent **1.5 billion**. By 2028, India will contribute $2.1 billion in spending to the state's travel economy.
- Road Trips**:** India's massive millennial population is driving demand for road journeys, the outdoors, and authentic local experiences. Major car rentals have all reported that California is their prime market from India in the US.
- Strong Demand: Outbound travel from India is growing rapidly, and there is high interest in personalized, luxury, and experience-driven itineraries.

CANADA

- The market with the strongest "boycott travel to the USA" sentiment
- Double digit decline in visitation for 2025
- Aggressive campaign from Visit California to separate California from Washington D.C.
- Visit California very active in Canada (Expedia) and consumer direct to amplify California's message of inclusion

CHINA

- China and the U.S. have now implemented the maximum level of tariffs on each other—an unsustainable situation for either side. It is widely expected that the two countries will eventually return to the negotiating table, although it remains too early to predict the direct impact on U.S.–China travel in the near term. Over the weekend, Trump Administration exempted tariffs on electronics and related items, which represents about 40% of China exports to the U.S… we, as AVIAREPS, expect that the situation should be resolved in the next two months before June.
- China issued a U.S. Travel Advisory for travel to the U.S. and encourages Chinese travelers to "assess potential risks and plan accordingly"
- Pre-booked travel to U.S. has not seen major cancellations, but future bookings have declined
- Travel for the 2028 Los Angles Summer Olympics continues to look strong

JAPAN

- The World Cup will definitely carry strong interest in Japan and would be amazing if the Japanese national team's group games took place in CA, and be based around the state. The Samurai Blue would also anticipate qualifying for the knock outs and could play in SF or LA as well.
- Baseball is far and away the biggest motivator for Japanese travelers. Several Japanese operators produce packages that include multiple game experiences in one trip
- In 2024, the yen hit a 38-year low against the US dollar and although recent market volatility has caused the yen to strengthen, it is still at the mid-¥140 level (¥120 to 1USD is the ideal exchange rate for long-haul outbound travel to US). In FY 25-26 the weak yen, competition for air seats and the overall low propensity to travel by Japanese will continue to be challenges to growth.
- California's main competition is Japan, with 49% of our target market planning to travel domestically in 2025. When traveling abroad, most people prefer short-haul Asian destinations for their convenience and affordability (South Korea, Thailand, Taiwan). Hawaii is less competitive due to high prices, lack of new attractions and issues like homelessness and crime.

MEXICO

- Double digit decline in arrivals by flights
- Single digit decline in arrivals by drive