

**Attachment G:  
The Economic & Fiscal Impacts  
and Visitor Profile of Mono  
County Tourism in 2008**

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*Consulting*



Department of Economic Development & Special Projects

**The Economic & Fiscal Impacts  
and Visitor Profile of  
Mono County Tourism in 2008**

January 2009

*Lauren Schlau  
Consulting*

January 23, 2009

Dan Lyster, Director  
Sarah McCahill, Manager  
Mono County Economic Development & Special Projects Department  
P.O. Box 2415  
Mammoth Lakes CA 93546

Dear Mr. Lyster and Ms. McCahill:

LSC is pleased to present the following Report on the results of the Study of the Economic and Fiscal Impacts of Mono County Tourism and Visitor Profile for fiscal year 2008.

Our findings and conclusions represent tourism activity based on market research conducted in four periods during 2007-08, reflecting then-current market conditions. These results were expanded to represent the entire year, and thus are not specific measures. The economic and fiscal impact estimates, generated by CIC Research, Inc. reliably reflects the conditions it measures.

This Report document includes narrative findings and conclusions. Detailed data tables were sent to you separately. Please feel free to contact me at any time should you have any questions, comments or need further interpretation of the results or this report.

We express our deep appreciation to the Economic Development Department for its support and thank you for the opportunity to have assisted you. We wish you success in your use of the study.

Sincerely,



Principal

C: Skip Hull, CIC Research, Inc.

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## SECTION 1 - EXECUTIVE SUMMARY OF FINDINGS

### Study Background & Approach

This Study of the Economic and Fiscal Impacts of Mono County Tourism ("the Study") was conducted to provide the Mono County Economic Development Department and other interested parties with accurate and credible estimates of Mono County tourism volume, the economic and fiscal impacts of tourism activity, and visitor demographics and trip characteristics. For this study, a visitor is anyone residing outside of Mono County.

The 2008 Study, which covers the fiscal year period June 2007 – May 2008, consisted of 1,214 on-site visitor intercept interviews (i.e., non-Mono County residents) in key Mono County visitor locales to obtain demographic, trip behavior and spending data. In addition, lodgings throughout Mono County were surveyed to develop a comprehensive inventory, and to determine seasonal and annual occupancy and average rates.

### Summary of Results

#### Visitor Volume, Days and Spending

For 2008, Mono County attracted an estimated 1.5 million visitors, who stayed an average of 3.1 days, generating 4.7 million total visitor days. Visitors spent a total of \$369.6 million and through this spending, generated \$16 million in lodging and retail sales taxes countywide as shown in Table 1.

**Table 1 - Summary Indicators - All Visitors**

Indicator	Annual Total	Summer	Fall	Winter	Spring
Total visitors	1,515,246	585,484	418,774	225,744	285,244
Average length of stay – all visitors (days)	3.10	3.25	2.17	3.80	3.45
Total visitor days	4,702,740	1,905,677	907,938	856,765	982,992
Average spending Daily per-person	\$ 78.58	\$ 54.24	\$ 54.20	\$ 171.00	\$ 71.70
Average Spending for Mono Trip per-group	\$ 738.41	\$ 567.51	\$ 324.45	\$ 2,055.82	\$ 738.74
Total Annual Direct visitor spending	\$ 369,560,000	\$ 103,360,000	\$ 49,210,000	\$ 146,510,000	\$ 70,480,000
Total Direct + Indirect Visitor Spending*	\$ 517,384,000	\$ 144,704,661	\$ 68,895,396	\$ 205,108,441	\$ 98,675,097
Annual Countywide Lodging & Sales Taxes	\$ 16,613,200	\$ 4,412,400	\$ 2,225,400	\$ 5,997,100	\$ 3,926,100

\* The indirect total spending results from applying a 1.4 multiplier to direct spending.  
Source: CIC Research, Inc. and Lauren Schlau Consulting.

Visitation also can be measured by lodging type. A total of 965,200 or 64% of the total visitors stayed overnight in Mono County, while day-trippers accounted for 550,000 visitors, 36% of total volume. The 2008 visitation figures by lodging type appear in Table 2.

**Table 2 - Summary of Tourism Volume by Visitor Lodging Segment**

Visitor Lodging Category	Individual Visitors	Ratio	Mean Stay in Mono Co. (Days)	Visitor Days	Ratio
Cabin/Campsite/RV/other paid	320,685	21.2%	4.92	1,576,782	33.5%
Hotel/Motel/Inn	277,065	18.3%	3.20	886,214	18.8%
Rental Condo	260,748	17.2%	4.56	1,189,571	25.3%
Private Residence/other unpaid	106,736	7.0%	4.69	500,162	10.6%
<b>Subtotal Overnight</b>	<b>965,234</b>	<b>63.7%</b>	<b>4.30</b>	<b>4,152,729</b>	<b>88.2%</b>
Day Visitors	550,012	36.3%	1.00	550,012	11.7%
<b>Total</b>	<b>1,515,246</b>	<b>100.0%</b>	<b>3.10</b>	<b>4,702,740</b>	<b>100.0%</b>

Source: CIC Research Inc., economic impact model

\*Visitor days are calculated by multiplying the number of visitors by their length of stay (days).

Mono County visitors spent \$369.6 million in total direct spending in 2008, or nearly \$80 average per-person per-day while in Mono County. Spending varied by visitor lodging segment, as follows:

- those renting condos spent the most in total, \$153 million, or \$129 per-person per-day;
- those lodging in hotels/motels/inns spent \$99 million in total or \$112 per-day;
- tent/cabin/RV campers spent \$72 million in total or \$46 per-person per-day;
- those staying in private residences/other unpaid lodging spent \$28 million in total or \$57 per-person per-day; and,
- day visitors spent \$15 million in total or \$57 per-person per-day.

**Table 3 - Visitor Spending in Mono County by Segment - 2008**

Visitor/Lodging Category	Daily Per - Capita Spending	Per Group Spending In Mono Co. (Total Trip)	Total Annual Expenditures (Direct)	Ratio
Rental Condo	\$ 128.91	\$ 2,291.98	\$ 153,350,000	41.5%
Hotel/Motel/Inn	\$ 112.09	\$ 1,062.55	\$ 99,340,000	26.9%
Cabin/Campsite/RV/other paid	\$ 46.11	\$ 827.81	\$ 72,710,000	19.7%
Private Residence/Other unpaid	\$ 56.70	\$ 744.12	\$ 28,360,000	7.7%
<b>Subtotal Overnight</b>	<b>\$ 85.19</b>	<b>\$ 1,235.42</b>	<b>\$ 353,760,000</b>	<b>95.8%</b>
Day Visitors	\$ 28.72	\$ 73.77	\$ 15,800,000	4.3%
<b>Total</b>	<b>\$ 78.58</b>	<b>\$ 738.41</b>	<b>\$ 369,560,000</b>	<b>100.0%</b>

Source: CIC Research Inc., economic impact model and Lauren Schlau Consulting

Visitors spent across a range of good and services categories. About one-third of all spending, \$118 million was for lodging in Mono County, while spending for meals out and beverages combined

accounted for another \$80 million. Visitors also spent over \$40 million on transportation (within the county on gas or car rental), as well as for admissions/recreation fees, over \$30 million for retail items and for groceries/incidentals, and \$16 million for recreational equipment and supplies, as shown in Table 4.

**Table 4 - Visitor Spending in Mono County by Category - 2008**

Spending Category	% Who Spent in Category	Avg. Daily Per-Person*	Total Direct Spending*	Category Ratio
Lodging (in Mono County)	64.1%	\$ 25.12	\$ 118,140,000	32.0%
Meals out/snacks	77.6%	\$ 13.48	\$ 63,410,000	17.2%
Transportation (gas, rental)	51.5%	\$ 10.61	\$ 49,880,000	13.5%
Admissions/recreation activities	36.6%	\$ 9.36	\$ 44,000,000	11.9%
Shopping/gifts/souvenirs	43.0%	\$ 6.55	\$ 30,820,000	8.3%
Groceries/incidental items	44.8%	\$ 6.43	\$ 30,240,000	8.2%
Beverages	57.6%	\$ 3.58	\$ 16,830,000	4.6%
Recreation equipment/supplies	17.9%	\$ 3.45	\$ 16,240,000	4.4%
<b>Total</b>	<b>98.1%</b>	<b>\$ 78.58</b>	<b>\$ 369,560,000</b>	<b>100.0%</b>

\*Per-person per day spending includes those not spending in that category.  
 Retail categories include sales tax; food and beverage categories include sales tax and tips.

### Multiplier

Additional levels of spending, *indirect* spending, accrued within the county from goods and services purchased by the tourism industry and by industry employees using earnings from visitor expenditures. This indirect spending is calculated by a "multiplier" that estimates the extent that such spending circulates through the economy.

Multipliers range from 1.2 to 2.5 in most California areas. Despite Mono County's relative isolation, its relative lack of locally available goods requires many goods to be purchased from sources outside the county. Therefore we estimate Mono County's multiplier at a **1.4**, which when applied to the \$369.5 million of direct visitor spending, yields **an additional \$147.8** million to the economy, resulting in total direct and indirect spending of **\$517.4 million** for 2008.

### Tax Impacts

The county realizes taxes from direct visitor spending on lodging and taxable retail sales. This study analyzed the transient occupancy (lodging) tax, of which Mono County and any incorporated towns collect 100% of room/unit sales of all transient lodgings.<sup>1</sup> It also analyzed retail sales, of which one

<sup>1</sup> Note: the county tax rate is 12% and Mammoth Lakes' tax rate is 13%. The figures in this report represent "countywide" collections not just the "County of Mono".



percentage point of the 7.25% California/Mono County retail tax on goods and services, including meals and beverages out, shopping and incidentals, and (private) transportation are realized by the county. Other taxes and fees such as business licenses, property and utility taxes, and special fees and assessments levied on visitor serving entities, while related and important, are outside the scope of this study.

A total of \$16.6 million in lodging and retail taxes was earned countywide in 2008 from all taxable visitor spending. Thus, for each visitor dollar, the county realized 6.2 cents in taxes. The \$15.1 million of transient occupancy tax, 91% of all visitor-generated taxes, reflects the fiscal importance of lodging.

**Table 5 - Lodging and Sales Tax Revenues from Visitor Spending**

Category	Taxable Total Spending	Countywide Tax Revenues	Ratio	State Tax Revenue	Total State & Taxes	Ratio
Lodging	\$ 118,140,000	\$ 15,062,900	91.0%	\$ -	\$ 15,062,900	58.1%
Meals	\$ 54,081,000	\$ 540,800	3.3%	\$ 3,380,100	\$ 3,920,900	15.1%
Beverages	\$ 14,354,000	\$ 143,500	0.9%	\$ 897,200	\$ 1,040,700	4.0%
Shopping/Gifts/retail	\$ 28,737,000	\$ 287,400	1.7%	\$ 1,796,000	\$ 2,083,400	8.0%
Transportation (gas)	\$ 23,254,000	\$ 232,500	1.4%	\$ 1,453,400	\$ 1,685,900	6.5%
Rec.equipment/supplies	\$ 15,142,000	\$ 151,400	0.9%	\$ 946,400	\$ 1,097,800	4.2%
Groceries/Incidentals	\$ 14,098,000	\$ 141,000	0.9%	\$ 881,100	\$ 1,022,100	3.9%
<b>Total</b>	<b>\$267,806,000</b>	<b>\$ 16,559,500</b>	<b>100.0%</b>	<b>\$ 9,354,000</b>	<b>\$25,913,700</b>	<b>100.0%</b>

Note: ticketed admissions are not taxable and therefore are excluded from the calculation  
Tax estimates based on visitor spending reported in the intercept survey.

## Employment

The actual number of Mono County jobs supported by visitor activity is not readily available and must be extrapolated from other sources. Research from California Tourism <sup>2</sup> indicates visitor spending per category and typical visitor jobs produced for Mono County. These figures were applied to the 2008 Mono County spending estimates.

Tourism supported an estimated annual average of 4,500 Mono County jobs, representing 62% of the countywide workforce, well above rates found elsewhere. This reflects significance of tourism to the Mono County economy. Due to the seasonality of Mono County tourism, many of these jobs are seasonal and part-time, and as well, this estimate will vary widely by season.

<sup>2</sup> California Travel Impacts By County 1992-2006 and Preliminary 2008 Estimates, Dean Runyan Associates, California Division of Tourism, March, 2008, p. 46

### Mono County Lodging Market

The Mono County lodging market contains 132 lodging properties with 8,632 units, separated into three major groups: tent, RV campgrounds and cabins, hotel/motel/inns, and condominiums. Unpaid lodging is excluded from this analysis.

On an annual basis, these lodgings offered 2.5 million available units. In 2008, guests occupied 1.0 million units, resulting in an overall annual countywide occupancy rate of 39.2%. The lodgings collectively achieved an average daily rate of \$118.60. Both occupancy and average rate varied by type.

- "Cabins/campgrounds" operated at an annual occupancy rate of nearly 48% and an average unit/space rate of \$35 per-night
- "Hotel/motel/inns" operated at 48% and an average rate of \$124 per-night
- "Condos" operated at an annual occupancy rate of 28% and an average rate of \$228 per-night per unit.
- Mono County properties outperformed Mammoth Lakes properties with a 51% annual occupancy rate versus 33%, while Mammoth Lakes, far exceeded the county areas for average rate, \$173 versus \$49, respectively, mainly as more high-rate full service hotels and a plethora of condominiums are located in Mammoth Lakes.

**Table 6 - Mono County Lodging Market Supply and Demand - 2008**

Sector	By Type				By Area	
	County wide	Cabin/ Camp/RV	Hotel/ motel/inn	Condo Other	Mono County	Mammoth Lakes
Daily Available Units	8,632	3,871	1,722	3,039	3,543	5,089
Annual Available Units*	2,578,668	879,194	587,324	1,112,150	866,573	1,712,095
Ratio of Available Units	100.0%	34.1%	22.8%	43.1%	33.6%	66.4%
Annual Occupied Units	1,010,504	418,182	283,893	308,429	442,852	567,630
Ratio of Occupied Units	100.0%	41.4%	28.1%	30.5%	43.8%	56.2%
Avg. Occupancy Rate	39.2%	47.6%	48.3%	27.7%	51.1%	33.2%
Avg. Daily Rate (ADR)	\$ 118.60	\$ 34.89	\$ 123.51	\$ 227.59	\$ 48.85	\$ 173.02

Source: Mono County Lodging Properties and Lauren Schlau Consulting

\* Accounts for units closed during the year for seasonality factors, renovation or other factors.

### Visitor Profile

Another goal of the study was to identify visitor demographics and trip characteristics.

- The vast majority, 90% of Mono County visitors resided in the United States with the remainder, 11% being from international areas.

- Hotel/motel lodging captured far more non-California and non-U.S. guests than campgrounds or condos.

**Table 7a – Overall Visitor Residency**

Residence Area	Total	MONO Co. Lodging Type				
		Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
U.S. (excl. California)	18.5%	29.6%	19.4%	6.8%	11.7%	10.7%
California resident	70.8%	59.0%	77.9%	88.5%	65.5%	79.4%
<b>Subtotal U.S.</b>	<b>89.2%</b>	<b>88.6%</b>	<b>97.3%</b>	<b>95.3%</b>	<b>77.2%</b>	<b>90.1%</b>
International resident	10.8%	11.4%	2.7%	4.7%	22.8%	9.9%

- Of the U.S. visitors, most, 79% were from California, followed by Nevada and Oregon.
- The top five states accounted for 90% of all U.S. visitors to Mono County.

**Table 7b - Top U.S. Feeder Markets**

Origin State	Total
1. California	79.3%
2. Nevada	7.2%
3. Oregon	1.8%
4. Colorado	1.5%
5. Florida	0.9%
<b>Total (Top 5)</b>	<b>90.7%</b>

\*Percentages based on U.S. residents, not entire sample.

- ▶ Among international visitors, as shown below, Europe was the largest feeder market, with 64% of total international volume, followed by Scandinavia with 14%, and Asia/Pacific Islands at 9%.

**Table 7c - Top Overall International Feeder Markets**

Origin	Total
<b>Base: Non-US visitors</b>	<b>122</b>
Europe (non- Scandinavia)	63.8%
Scandinavia (Denmark, Finland, Iceland, Norway, Sweden)	13.9%
Asia/Pacific Islands	8.9%
Australia/New Zealand	5.6%
Canada	3.7%
Middle East	2.6%
All Other (any not listed above)	< 2%

Most visitors in Mono County stayed overnight, and reported above average annual household incomes. Visitors were highly satisfied with Mono County as a visitor destination.

The key visitor profile factors are shown in the next Table.

**Table 8 - Overall Profile of Mono County Visitors**

Characteristic	All Mono County Visitors
% of Total Visitors in Segment <sup>1</sup>	100.0%
% Californians (of total visitors)	70.7%
% International Resident	10.8%
% Have Visited in past 3 Years	64.1%
Avg. # Visits to MC in Past 3 Years (by those who visited)	5.17
% Mono County Day Visitors	35.6%
Avg. Nights Stay in MC (all visitors)	2.49
Avg. Nights Stay in MC (overnighters) <sup>2</sup>	3.82
% Used Lodging's Internet web-site to reserve Mono lodging <sup>3</sup>	26.4%
Avg. Number of Weeks in Advance reserved lodging	7.48
% Mono County is Main Destination	65.4%
Satisfaction Rating (5= highest – 1 = lowest)	4.66
Average # Persons in travel group	3.79
Median Respondent Age (years)	48.27
Median Annual Household Income	\$92,600

## **SECTION 2 - STUDY OVERVIEW**

### **Introduction**

This report represents the culmination of the effort to measure the economic and fiscal impacts of Mono County tourism for fiscal year 2008. This is the first such in-depth research study by the Mono County Economic Development Department (the County).

The study provides a benchmark for the Mono County tourism industry relative to visitor volume, spending, fiscal impacts and critical demographic and trip behavior information from which to plan and design more effective marketing, promotion, educational and development programs.

### **Mono County Economic Development Department**

The Mono County Economic Development & Special Projects Department is an operating department of Mono County, a governmental agency. The Department works to promote tourism to Mono County on behalf of countywide economic development interests including attracting visitors, and encouraging visitor spending that generates fiscal benefits and supports tourism related employment.

As the County's recognized tourism promotion and development agency, the Department's main purposes and initiatives include:

- Coordinate and act as a catalyst for effective tourism promotion programs;
- Serve as the central information source for visitors, the media and travel industry;
- Serve as the data center for tourism statistics, trends and information;
- Identify the need for facilities, attractions and services;
- Work with the community to meet economic development goals.

To fulfill the above and to provide the County a factual basis on which to make effective decisions, the size, scope and impacts of the county's tourism are documented through this primary research study. The study data and findings are considered to reflect and describe Mono County's tourism industry at the time the research was conducted. The results are applicable for revealing trends and opportunities to help direct current and future County and industry priorities and programs.

### **Approach**

The Study consisted of a three-part process:

1. 1,214 on-site intercept interviews with visitors (i.e., non-Mono County residents) in specified Mono County visitor locales to obtain demographic, trip behavior and spending data. The data were collected by professional interviewers using hand-held computers.

2. An inventory as well as occupancy and average rate data from Mono County' lodgings via a confidential survey, were collected by Mono County and tabulated by LSC, in order to assess seasonal visitor patterns, lodging guest volume (occupied room nights), overall average rate.
  
3. An estimate of tourism generated tax/fiscal impacts and employment.

The interviews were conducted in the following Mono County locations shown in total and by season.

**Table 9 - Interview Location and Number of Surveys Completed**

	TOTAL	Interview Wave*			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>BASE:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Lee Vining/Mobil Mart	19.1%	14.8%	35.2%	0.0%	19.3%
Mono Lake Visitor Center	9.7%	2.5%	24.3%	0.7%	10.2%
June Lake - Main Street/Market	9.1%	4.4%	12.1%	25.1%	2.2%
Bodie - Visitor Center	8.9%	12.5%	6.0%	0.0%	12.4%
Walker – Main Street	7.0%	18.1%	0.3%	0.0%	0.0%
Crowley Lake - Toms Place Store	6.3%	6.3%	4.1%	0.0%	13.9%
Devil's Postpile	3.4%	8.8%	0.2%	0.0%	0.0%
Bridgeport Main St./Courthouse	3.3%	6.3%	2.8%	0.0%	0.8%
Lee Vining/ Tioga Pass	1.1%	0.0%	2.3%	0.0%	2.3%
Sonora Pass	0.5%	0.0%	0.0%	3.6%	0.0%
Shady Rest Park X-C Ski Area	0.3%	0.0%	0.0%	1.7%	0.0%
Smokey Bear Flats	0.0%	0.0%	0.0%	0.3%	0.0%
<b>Subtotal County Areas</b>	<b>68.6%</b>	<b>73.6%</b>	<b>87.3%</b>	<b>31.4%</b>	<b>61.0%</b>
Mammoth Lakes - Welcome Visitor Center/ Trolley-Shuttle	8.6%	11.6%	5.7%	11.7%	4.8%
Mammoth Lakes - Von's Market Area	6.2%	1.3%	4.6%	0.0%	22.1%
Mammoth Lakes - Village	4.2%	6.6%	0.0%	2.7%	6.7%
Mammoth Mtn. Main Lodge	4.1%	0.0%	0.0%	23.7%	2.9%
Mammoth Mtn. Adventure Center/Reds Meadow Shuttle	2.4%	5.8%	0.7%	0.0%	0.0%
Mammoth Mtn. - Eagle Lodge	1.6%	0.0%	0.0%	11.2%	0.0%
Tamarack Lodge X-C Ski Area	1.6%	0.0%	0.0%	7.5%	2.5%
Mammoth Mtn. - Canyon Lodge	1.6%	0.0%	0.0%	10.6%	0.0%
Mammoth Lakes - Lakes Basin	0.9%	1.1%	1.7%	0.0%	0.0%
Mammoth Lakes Ice Rink	0.2%	0.0%	0.0%	1.0%	0.0%
<b>Subtotal Mammoth Lakes Areas</b>	<b>31.4%</b>	<b>26.4%</b>	<b>12.7%</b>	<b>68.40%</b>	<b>39.0%</b>

\* Interviewing locations were varied by season to reflect closures and seasonality factors.

Data from the visitor intercept and lodging surveys were input into the Visitor Economic Impact Model, designed by CIC Research, Inc., which generated the estimated annual number of visitors, visitor days and visitor spending as well as sales and lodging taxes generated by visitors.

## **Report Organization**

This written report of the quantitative and qualitative analysis of Mono County' tourism industry covers the following general topics:

- estimated visitor volume
- estimated visitor spending (economic impacts) and taxes generated (fiscal impacts)
- visitor demographics (age, income, household composition, gender)
- visitor trip characteristics (length of stay, lodging and reservations, visitor party size and composition, trip information sources, transportation, trip purpose and activities, etc.)

The remaining sections of the Report are as follows:

Section 3: Economic and Fiscal Impacts of Mono County Tourism

Section 4: Mono County Visitor Serving Environment

Section 5: Visitor Behavior and Characteristics Profiles

Section 6: Final Observations

Appendix 1: Detailed Visitor Profiles

Appendix 2: Visitor Intercept Survey

## **Acknowledgements**

Sincere appreciation is expressed to Mono County Department of Economic Development and Special Projects, the Mono County Tourism Commission, countywide lodging operators and others who contributed their time and provided valuable information to lead to the successful completion of this most worthwhile undertaking.

## SECTION 3

### ECONOMIC AND FISCAL IMPACTS OF MONO COUNTY TOURISM

#### Economic Impact Model/Estimate Derivation

One of the main purposes of this study is to measure tourism's economic and fiscal impacts in Mono County. These impacts were derived directly from visitors through on-site intercept surveying and from Mono County lodgings. Secondary data sources include the California Tourism Office and the California Board of Equalization.

All results are input into an economic impact model by CIC Research, Inc.,<sup>3</sup> to estimate visitor activity in terms of the number of visitors, visitor days and visitor spending, in total and per-capita, and by visitor lodging segments. The model begins by estimating the number of lodging guests from the number of occupied lodging rooms, and then calculates the number of day visitors resulting in the estimate of total visitors. Reported length of stay from the intercept data is applied to the number of visitors, yielding the estimated total visitor days and the overall average length of stay. Finally, the average reported visitor spending multiplied by the total number of visitors, results in annual direct total visitor spending and spending by day visitors and by guests of paid and unpaid lodging.

Employment data are derived from the California Travel & Tourism Commission to estimate the number of direct tourism jobs supported in Mono County, and taxes are calculated from the aggregated taxable spending figures estimated by the CIC, Inc. economic impact model.

Thus, indicators such as demographics and trip behaviors use the actual visitor survey results, while the lodging survey and the visitor intercepts were used to estimate the number of lodging guests.

#### Definitions

A **visitor** is someone who resides outside of Mono County and visiting Mono County for any purpose other than regular employment or to attend school. The residency and trip purpose provide a common basis to differentiate "" from "visitor" impacts.

The following explains the key visitor measurements and how they are derived.

- A **visitor group** is the immediate travel party, which multiplied by the group size (the average number of persons per group) generates the number of visitors.
- **Visitor days** refers to the total number of days spent in Mono County by all visitors, calculated as the number of visitors multiplied by the average length of stay (number of days) in Mono County, e.g., two persons staying three days represent six visitor days.

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<sup>3</sup> RIMS input-output model, CIC Research, Inc., San Diego



- **Visitor spending** refers to total or daily per-person amounts spent by visitors for all goods and services while in Mono County (e.g. the two people who each spend \$100.00 over three days account for \$600.00 of total spending).

This report generally refers to Mono County as all towns and unincorporated areas encompassing the entire "countywide" area, versus Mono County the governmental entity.

### Visitor Volume, Visitor Days and Visitor Spending

The following tables summarize Mono County visitor activity estimates, and key overall visitor volume and spending estimates for fiscal 2008.

As shown below, an estimated annual nearly **1.5 million visitors** came to Mono County, accounting for **4.7 million visitor days** and **\$369 million** in total annual direct visitor spending impact. As well, these visitors averaged nearly \$79.00 per person in daily spending and \$738 for the trip by their immediate visitor group.

**Table 10 - Summary Visitor Indicators**

Indicator	Annual Total	Summer	Fall	Winter	Spring
Total visitors	1,515,246	585,484	418,774	225,744	285,244
Average length of stay – all visitors (days)	3.1	3.25	2.17	3.80	3.45
Total visitor days	4,702,740	1,905,677	907,938	856,765	982,992
Average spending Daily per-person	\$ 78.58	\$ 54.24	\$ 54.20	\$ 171.00	\$ 71.70
Average Spending for Mono Trip per-group	\$ 738.41	\$ 176.54	\$ 117.51	\$ 648.99	\$ 247.09
Total Annual Direct visitor spending	\$ 369,560,000	\$ 103,360,000	\$ 49,210,000	\$ 146,510,000	\$ 70,480,000
Total Direct and Indirect Visitor Spending*	\$ 517,384,000	\$ 144,704,661	\$ 68,895,396	\$ 205,108,441	\$ 98,675,097
Annual Countywide Lodging & Sales Taxes	\$ 16,613,200	\$ 4,412,400	\$ 2,225,400	\$ 5,997,100	\$ 3,926,100

\* Indirect total spending results by applying a 1.4 multiplier to direct spending  
 Source: CIC Research, Inc. and Lauren Schlau Consulting

The California Travel & Tourism Commission (CTTC) publishes a report <sup>4</sup> estimating countywide tourism expenditures but does not estimate visitor volume. In 2006, the most current year for which the estimate was made, visitors were reported to spend a total of \$395 million in Mono County. The differences may be attributable to different research methodologies, and the fact that state counts anyone who travels 50+ miles as a visitor, that may include a substantial number of Mono County residents, whereas in this study, Mono County residents are excluded. In addition, the studies were completed in different years.

<sup>4</sup> California Travel Impacts By County 1992-2006, Dean Runyan Associates

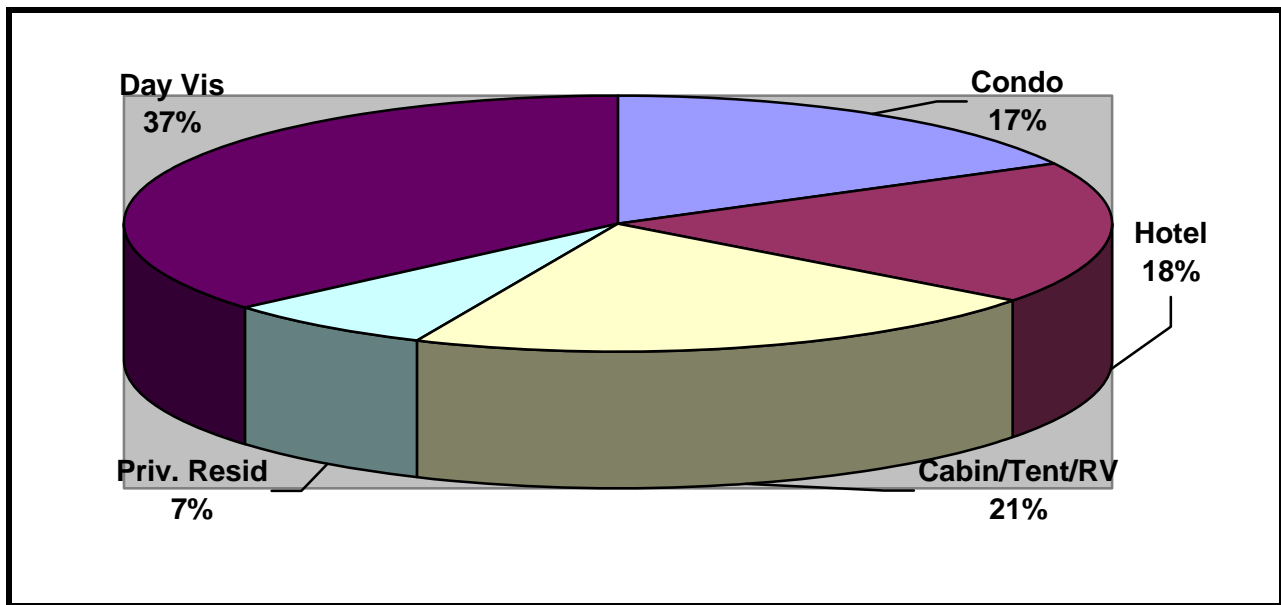
### Visitor Volume, Visitor Volume & Spending By Lodging Type

Another level of analysis defines visitors by the type of lodging used during their stay in Mono County: which can be broken out into five distinct segments: those staying in hotels/motels/inns, renting condos, RV/tent/cabin campers, those staying in private residences (unpaid) and day visitors.

#### Visitor Volume

In total 1.5 million visitors are estimated to have visited Mono County in 2008. Of the total, visitors staying overnight comprised about two-thirds or 64% of the total visitor volume while day visitors were 36%. However, no single overnight segment was larger than the day visitor segment. Visitor volume ratio by lodging type is shown below in Exhibit 1.

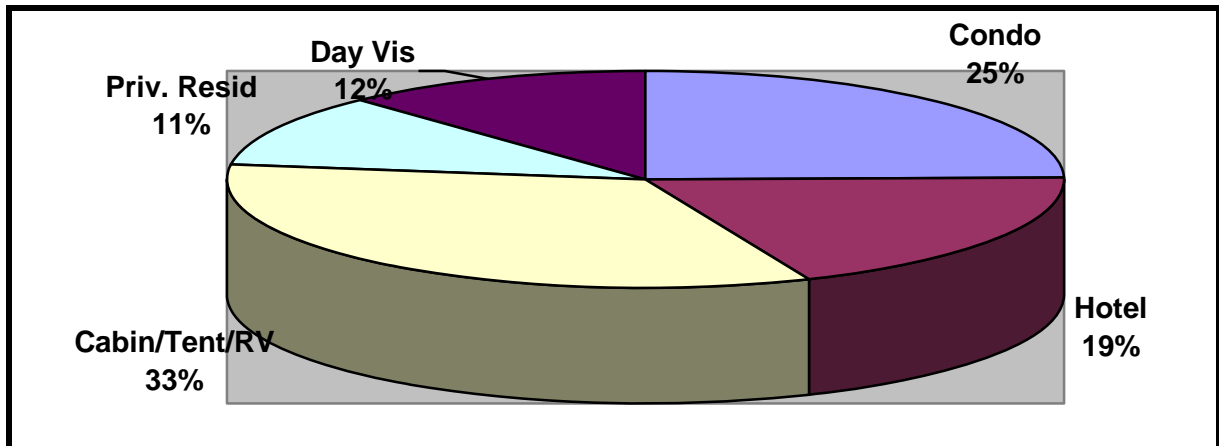
**Exhibit 1 – Visitor Volume Ratio by Lodging Type**



#### Visitor Days

Based on an overall mean 3.1 days length of stay, visitors accounted for 4.7 million visitor days in Mono County. When length of stay is factored into visitor volume, the ratios change notably. Whereas day visitors comprised 36% of visitor volume due to their short one-day visit, they then comprise 12% of visitor days and overnight visitors comprise 88% of visitor days as shown below.

**Exhibit 2 – Visitor Days Ratio by Lodging Type**

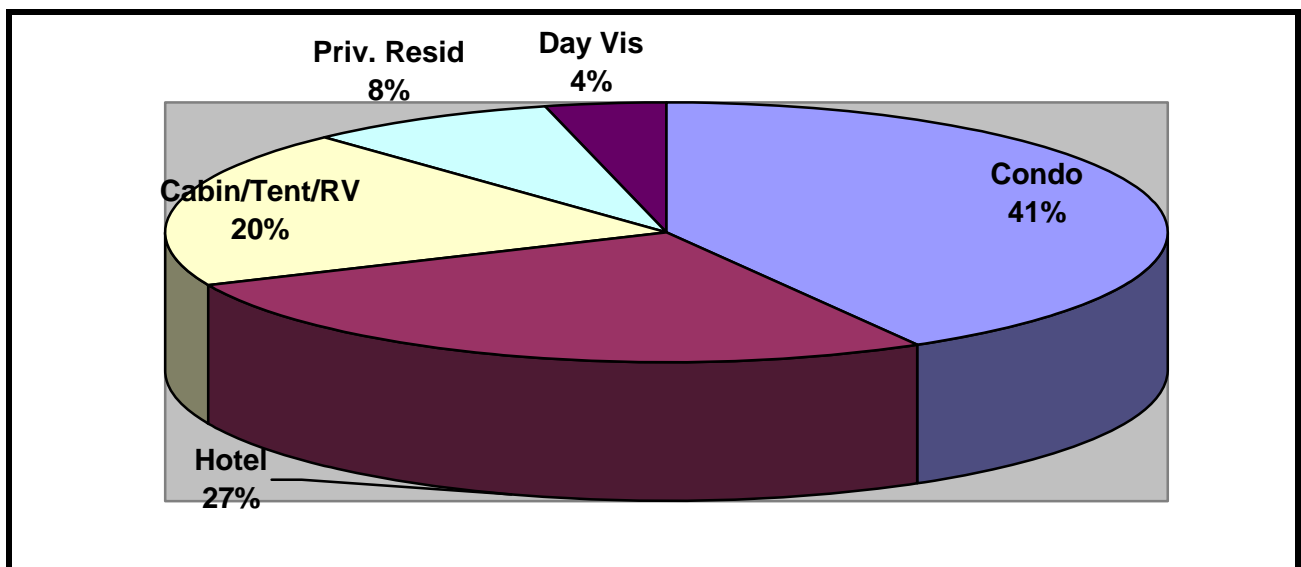


**Visitor Spending**

Finally, visitors spent a total of \$369 million in Mono County during 2008. When looking at spending by lodging type, the ratios again shift to the point that day visitors accounted for 4% of the spending whereas overnight visitors account for 96%.

Of the total visitors, those who stayed in condos (paid) accounted for a total of \$153 million or 41% of total spending, followed by those lodging overnight in hotels/motels/inns who generated a total of \$99.3 million in spending or 27%. Cabin/RV campers accounted for \$72.7 million or 20%, and visitors lodging in private residences (unpaid) spent \$28.4 million, or 8% of the total.

**Exhibit 3 – Visitor Total Spending by Lodging Type**



**Table 11 - Summary of Visitor Indicators - 2008**

Visitor/Lodging Category	Individual Visitors	Ratio	Mean Stay In Mono Co. (Days)	Visitor Days	Ratio	Daily Per Capita Spending	Per Group Spending In Mono Co. (Total Trip)	Total Annual Expenditures (Direct)	Ratio
Rental Condo	260,748	17.2%	4.56	1,189,571	25.3%	\$ 128.91	\$ 2,291.98	\$ 153,350,000	41.5%
Hotel/Motel/Inn	277,065	18.3%	3.20	886,214	18.8%	\$ 112.09	\$ 1,062.55	\$ 99,340,000	26.9%
Cabin/Campsite/RV Park/ other paid	320,685	21.2%	4.92	1,576,782	33.5%	\$ 46.11	\$ 827.81	\$ 72,710,000	19.7%
Private Residence/other unpaid	106,736	7.0%	4.69	500,162	10.6%	\$ 56.70	\$ 744.12	\$ 28,360,000	7.7%
<b>Subtotal Overnight</b>	<b>965,234</b>	<b>63.7%</b>	<b>4.30</b>	<b>4,152,729</b>	<b>88.2%</b>	<b>\$ 85.19</b>	<b>\$1,235.42</b>	<b>\$ 353,760,000</b>	<b>95.8%</b>
Day Visitors	550,012	36.3%	1.00	550,012	11.7%	\$ 28.72	\$ 73.77	\$ 15,800,000	4.3%
<b>Total</b>	<b>1,515,246</b>	<b>100.0%</b>	<b>3.10</b>	<b>4,702,740</b>	<b>100.0%</b>	<b>\$ 78.58</b>	<b>\$ 738.41</b>	<b>\$ 369,560,000</b>	<b>100.0%</b>

### **Economic Impacts by Spending and Category Lodging Segment**

Overall spending by spending category is discussed below and shown in Table 13.

**Total:** Overall, visitors spent \$369.5 million in Mono County on a direct basis, or an average of \$79.00 per-person per-day. Spending is broken out into eight spending categories as discussed below in terms of the percentage of visitors who reported spending any amount in the category, the total aggregated spending in Mono County for the year, and the average daily spent per-person. These figures are shown in the table following the narrative below.

The most in total was spent on **Lodging**. Overall, 64% indicated staying overnight in Mono County, and spending on lodging totaled \$118.1 million, accounting for 32% of all visitor spending. Spending averaged \$25.12 daily per-person, which may seem to be low, however it represents spending by all visitors whether or not they spent for lodging. The average daily per-person spending on lodging was \$55 for those renting condos and \$43 for those using hotels.

Total spending **for meals out** was the second highest category at \$63.4 million, or about \$13.50 daily per-person, accounting for 17% of the total. When adding in the \$16.8 million spent for **beverages**, this combined category then accounts for \$80.2 million or nearly 22% of the total spending.

**Transportation** (car rental, fuel) the third highest category, totaling \$49.9 million, and accounting for 13.5% of total visitor spending. Overall 52% reported spending in this category and on a daily basis, each visitor spent \$10.61 on average.

Over one-third or 36% reported spending for **admissions and recreational activities**. Spending totaled \$44 million, or 12% of the total and averaged \$9.36 per-person.

**Retail shopping** totaled nearly \$31 million, or 8.3% of the total. Just over four in ten or 43% reported spending in this category. and each visitor spent an average of \$6.55 on retail items.

Visitor spending for **groceries and incidentals** reached \$30.2 million, representing 8.2% of the total, or \$6.43 daily per-person by the 45% who reported spending on these items in Mono County.

Finally, 18% of visitors spent a total of \$16.2 million on **recreational equipment/supplies** sales and/or rentals, or an average of \$3.45 per person per day.

**Table 12 – Total Visitor Spending in Mono County by Category**

Spending Category	% Who Spent in Category	Avg. Daily Per-Person*	Total Spending*	Category Ratio
Lodging (in Mono County)	64.1%	\$ 25.12	\$ 118,140,000	32.0%
Meals out/snacks	77.6%	\$ 13.48	\$ 63,410,000	17.2%
Transportation/parking	51.5%	\$ 10.61	\$ 49,880,000	13.5%
Admissions/recreation activities	36.6%	\$ 9.36	\$ 44,000,000	11.9%
Shopping/gifts/souvenirs	43.0%	\$ 6.55	\$ 30,820,000	8.3%
Groceries/incidental items	44.8%	\$ 6.43	\$ 30,240,000	8.2%
Beverages	57.6%	\$ 3.58	\$ 16,830,000	4.6%
Recreation equipment/supplies	17.9%	\$ 3.45	\$ 16,240,000	4.4%
<b>Total</b>	<b>98.1%</b>	<b>\$ 78.58</b>	<b>\$ 369,560,000</b>	<b>100.0%</b>

Source: Lauren Schlau Consulting and CIC Research

\* Daily per-person spending includes those not spending in that category.

Retail categories include sales tax; food and beverage categories include sales tax and tips.

**Visitor Spending by Lodging Segment**

Expenditures by lodging segment are discussed and shown in each table below. The data include each segment's total and average daily spending by category, and the category ratio to total spending.

**Condo guests:** Mono County condo (paid) visitors spent the most of any group both in total, accounting for \$153 million, and per day, averaging \$129. They spent more on lodging rental, nearly \$55.00 per-person/day, and \$65 million in total for lodging, above by far any other spending category. They accounted for nearly \$20 million for meals out and also for admissions/recreational activities. Also pushing these visitors' spending is their long length of stay, 4.5 days, as mentioned. This expenditure and stay pattern suggests that condo visitors also tend to be winter skiers.

**Table 13 – Spending by Condo Visitors**

Spending Category	Rental Condo		
	Daily Per Capita Spending	Ratio	Total Annual Expenditures
Lodging	\$ 54.73	42.5%	\$ 65,110,000
Admissions/Recreation Activities	\$ 16.79	13.0%	\$ 19,970,000
Meals	\$ 16.71	13.0%	\$ 19,870,000
Transport/Parking	\$ 12.27	9.5%	\$ 14,600,000
Groceries/Incidentals	\$ 10.42	8.1%	\$ 12,400,000
Shopping/Gifts	\$ 8.67	6.7%	\$ 10,310,000
Recreation Equipment/Supplies	\$ 5.53	4.3%	\$ 6,570,000
Beverages	\$ 3.80	2.9%	\$ 4,520,000
<b>Total</b>	<b>\$ 128.91</b>	<b>100.0%</b>	<b>\$ 153,350,000</b>

Source: Lauren Schlau Consulting and CIC Research, Inc.

1. Per-capita amount represents the average of all in the segment whether or not they spent in a category.
2. Lodging spending only for paid lodging; figure represents spending per-person, not the room rate paid

Note: Expenditures include all applicable taxes and tips, rounded to nearest \$10,000

**Hotel/Motel/Inn Guests:** This segment accounted for the second highest spending total, \$99.3 million. As with condo guests, more of their expenditure, \$38 million or 39% was for lodging. They also spent another \$16.3 million in meals out as well as over \$12 million each for admissions/recreational activities and transportation.

**Table 14 – Spending by Hotel/Motel/Inn Visitors**

Spending Category	Hotel/Motel/Inn Visitors		
	Daily Per Capita Spending	Ratio	Total Annual Expenditures *
Lodging	\$ 43.43	38.7%	\$ 38,490,000
Meals	\$ 18.33	16.4%	\$ 16,250,000
Transport/Parking	\$ 14.37	12.8%	\$ 12,740,000
Admissions/Recreation Activities	\$ 13.87	12.4%	\$ 12,290,000
Shopping/Gifts	\$ 6.79	6.1%	\$ 6,010,000
Recreation Equipment/Supplies	\$ 5.55	5.0%	\$ 4,920,000
Groceries/Incidentals	\$ 5.22	4.7%	\$ 4,630,000
Beverages	\$ 4.53	4.0%	\$ 4,020,000
<b>Total</b>	<b>\$ 112.09</b>	<b>100.0%</b>	<b>\$ 99,340,000</b>

Source: Lauren Schlau Consulting and CIC Research, Inc.

**Cabin/campsite/RV campers:** Another important segment of Mono County tourism is campers, with total spending of \$72.7 million or \$46 per-person per-day. While they too spent more on lodging (campsite) at \$14.6 million or 20% of their total spending, they spent nearly as much, \$13.9 million on meals out and \$13.2 million on transportation while in Mono County.

**Table 15 – Spending by Cabin/Campsite/RV Visitors**

Spending Category	Cabins/Campsites/RV Parks/Other		
	Daily Per Capita Spending	Ratio	Total Annual Expenditures *
Lodging	\$ 9.23	20.0%	\$ 14,550,000
Meals	\$ 8.83	19.1%	\$ 13,920,000
Transport/Parking	\$ 8.26	17.9%	\$ 13,020,000
Shopping/Gifts	\$ 5.85	12.7%	\$ 9,230,000
Groceries/Incidentals	\$ 5.12	11.1%	\$ 8,070,000
Admissions/Recreation Activities	\$ 3.84	8.3%	\$ 6,060,000
Beverages	\$ 3.23	7.0%	\$ 5,090,000
Recreation Equipment/Supplies	\$ 1.75	3.8%	\$ 2,760,000
<b>Total</b>	<b>\$ 46.11</b>	<b>100.0%</b>	<b>\$ 72,710,000</b>

Source: Lauren Schlau Consulting and CIC Research, Inc.



**Private residence visitors:** These visitors generally do not pay for lodging. Overall, they spent a total of \$28.4 million, or an average of \$57 daily per-person. Of their total spending, \$6 million, 24% of their total spending, which equals \$14 daily per-person, was for meals, with another \$5.1 million, or 18% and \$10.00 daily per-person, for transportation.

**Table 16 – Spending by Private Residence/Other Unpaid Lodging Visitors**

Spending Category	Private Home / Other Unpaid		
	Daily Per Capita Spending	Ratio	Total Annual Expenditures*
Meals	\$ 13.64	24.0%	\$ 6,820,000
Transport/Parking	\$ 10.30	18.2%	\$ 5,150,000
Admissions/Recreation Activities	\$ 9.73	17.2%	\$ 4,870,000
Groceries/Incidentals	\$ 9.05	16.0%	\$ 4,520,000
Shopping/Gifts	\$ 5.68	10.0%	\$ 2,840,000
Beverages	\$ 4.40	7.8%	\$ 2,200,000
Recreation Equipment/Supplies	\$ 3.92	6.9%	\$ 1,960,000
Lodging	\$ -	0.0%	\$ -
<b>Total</b>	<b>\$ 56.70</b>	<b>100.0%</b>	<b>\$ 28,360,000</b>

Source: Lauren Schlau Consulting and CIC Research, Inc.

**Day Visitors:** Although this segment does not stay overnight in Mono County, the magnitude of 550,000 annual day visitors has a notable spending impact of \$15.8 million. Not spending on lodging, more of their spending was on meals out, \$6.55 million representing 41%, of their total and an average of \$12 per-person per-day. They spent another \$4.4 million, 27% or \$8.00 per-person per-day on transportation

**Table 17 – Spending by Day Visitors**

Spending Category	Day Visitors		
	Daily Per Capita Spending	Ratio	Total Annual Expenditures*
Meals	\$ 11.90	41.4%	\$ 6,550,000
Transport/Parking	\$ 7.94	27.6%	\$ 4,370,000
Shopping/Gifts	\$ 4.41	15.4%	\$ 2,430,000
Beverages	\$ 1.82	6.3%	\$ 1,000,000
Admissions/Recreation Activities	\$ 1.48	5.1%	\$ 810,000
Groceries/Incidentals	\$ 1.12	3.9%	\$ 610,000
Recreation Equipment/Supplies	\$ 0.06	0.2%	\$ 30,000
Lodging	\$ -	0.0%	\$ -
<b>Total</b>	<b>\$ 28.72</b>	<b>100.0%</b>	<b>\$ 15,800,000</b>

Source: Lauren Schlau Consulting and CIC Research, Inc.

## Visitation By Season

Mono County's widely varied terrain, environmental factors and offerings make it a highly seasonal destination with different visitor markets, characteristics and volume. Due to these distinctions, this study includes an analysis of these seasonality factors as discussed in this section.

### Visitor Volume

Volume by season is discussed below and shown in the following table.

**Summer:** captured the most volume, 585,500 visitors, representing 39% of total volume. More summer visitors, 217,400, were in Mono County for the day only, with another 178,800 staying overnight in area campgrounds while fewer utilized the other lodging types.

**Fall:** Not surprisingly, Fall volume is lower than for summer but still second highest of the four seasons, with nearly 419,000 visitors. Again, more, over one-half, or 225,000, were day visitors, while the second highest volume was campers, at 75,800.

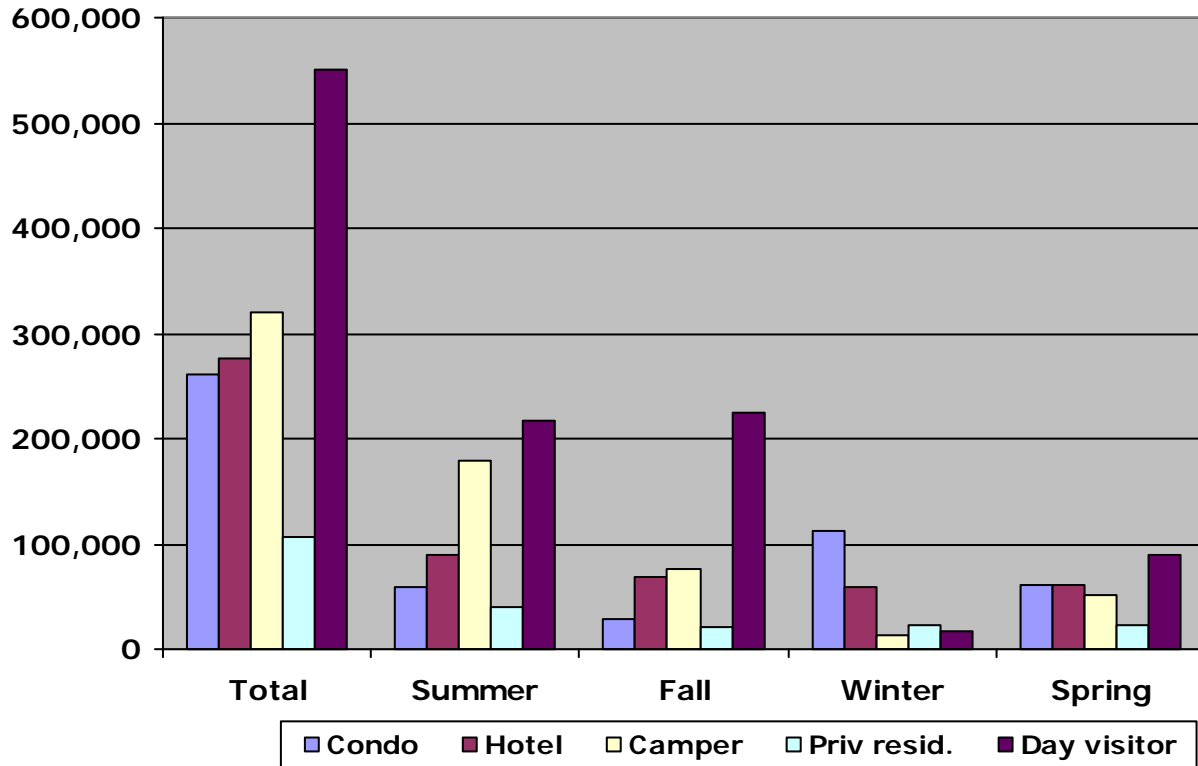
**Winter:** This season accounted for the lowest visitor volume, at 225,700 visitors. As may be expected, lodging shifted dramatically into condos, with about one-half or 112,000 of Winter visitors, and another 58,600 stayed in area hotels/motels. Far fewer, under 10%, were day visitors.

**Spring:** Volume for spring was the second lowest, just above winter, with 285,200 visitors or 19% of the total annual visitation. While 90,000 or nearly one-third were day visitors, 60,000 visitors stayed in condos and another 60,000 stayed in hotels/motels.

**Table 18 – Visitor Volume by Season by Lodging Type**

Visitor Category	Total	Summer	Fall	Winter	Spring
Rental Condo	260,748	59,338	29,097	112,280	60,032
Hotel/Motel/Inn	277,065	90,149	68,239	58,571	60,106
Cabin/Campsite/RV/Other Paid	320,685	178,830	75,804	13,974	52,078
Private Homes /Other Unpaid	106,736	39,779	20,355	23,579	23,022
Day Visitors	550,012	217,388	225,278	17,340	90,006
<b>Total</b>	<b>1,515,246</b>	<b>585,484</b>	<b>418,774</b>	<b>225,744</b>	<b>285,244</b>
<b>Ratio To Total</b>	<b>100.0%</b>	<b>38.6%</b>	<b>27.6%</b>	<b>14.9%</b>	<b>18.8%</b>

**Exhibit 4 – Visitor Volume by Season by Lodging Type**



**Visitor Spending By Season**

Visitor spending in total by season is discussed below and shown in the following table.

**Summer:** while capturing the highest visitor volume, summer accounted for the second total of \$103.4 million, or 28% of total annual Mono County visitor spending. The campers, who were the highest volume segment for this season, also spent the most, \$39.7 million, followed by condo visitors at \$8 million, and hotel guests who spent \$23.2 million.

**Fall:** Although Fall visitor volume was second highest of the four seasons, they spent the least, a total of \$49.2 million. Campers again spent the most, \$15 million but hotel/motel guests spent nearly as much, \$13.8 million followed by \$11 million for condo guests.

**Winter:** While accounting for the lowest visitor volume, the season’s visitor spending far outpaced the others. Winter visitors spent a total of \$146.5 million or 40% of the annual total. Not surprisingly, winter condo users spent the most, \$82.5 million, with hotel guests spending \$41 million one-half that of the condo users.

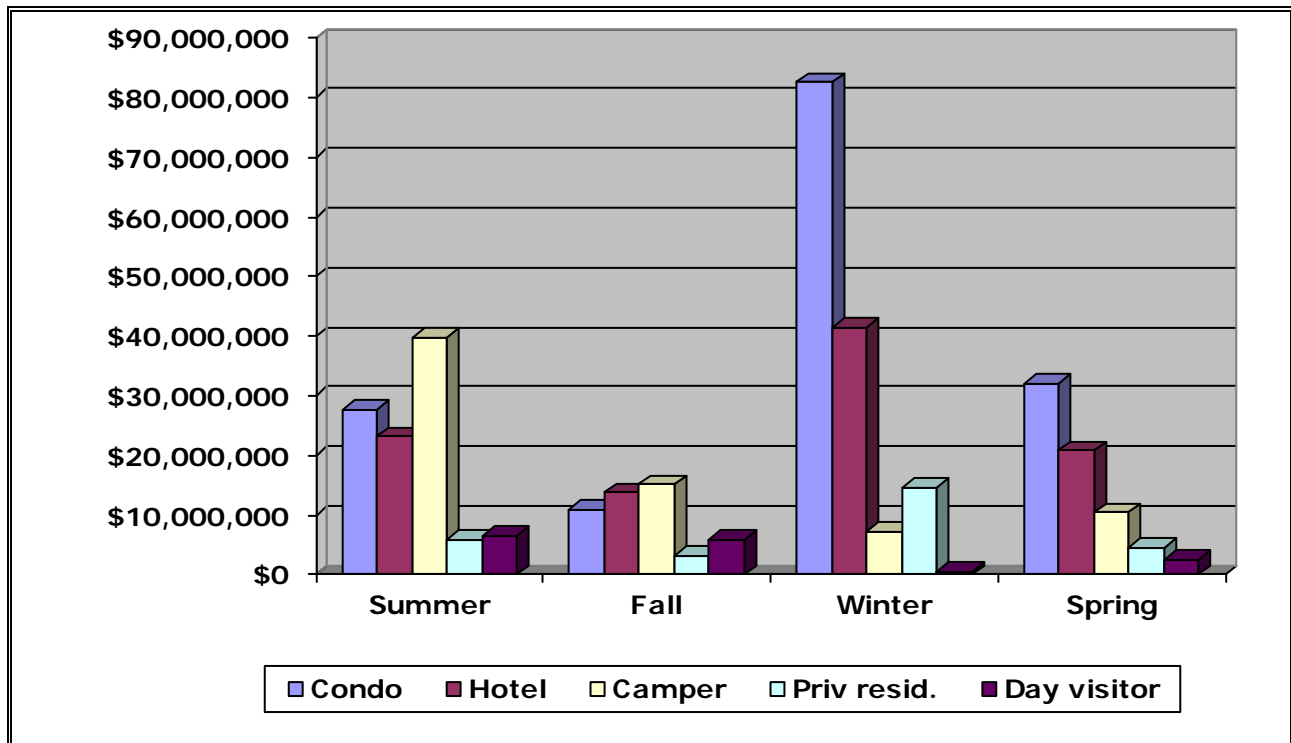
**Spring:** Spring spending was the second lowest, at \$70 million or 19% of the annual total. Nearly one-half the season's total spending, \$32 was accounted for by condo guests, while hotel visitors spent nearly \$21 million.

**Table 19 – Seasonal TOTAL Spending Volume by Lodging Type**

Visitor Category	Total	Summer	Fall	Winter	Spring
Rental condo	\$ 153,350,000	\$ 27,810,000	\$ 10,990,000	\$ 82,520,000	\$ 32,030,000
Hotel/Motel/Inn	\$ 99,340,000	\$ 23,230,000	\$ 13,790,000	\$ 41,500,000	\$ 20,810,000
Cabin/Campsite/RV/ other paid	\$ 72,710,000	\$ 39,730,000	\$ 15,230,000	\$ 7,330,000	\$ 10,430,000
Private Home/other unpaid	\$ 28,360,000	\$ 5,930,000	\$ 3,210,000	\$ 14,600,000	\$ 4,610,000
Day Visitors	\$ 15,800,000	\$ 6,650,000	\$ 5,990,000	\$ 560,000	\$ 2,600,000
<b>Total Direct*</b>	<b>\$369,560,000</b>	<b>\$ 103,360,000</b>	<b>\$ 49,210,000</b>	<b>\$ 146,510,000</b>	<b>\$ 70,480,000</b>
Total Direct + Indirect	<b>\$ 517,383,595</b>	<b>\$ 144,704,661</b>	<b>\$ 68,895,396</b>	<b>\$ 205,108,441</b>	<b>\$ 98,675,097</b>
<b>Ratio To Total*</b>	<b>100.0%</b>	<b>28.0%</b>	<b>13.3%</b>	<b>39.6%</b>	<b>19.1%</b>

\* Total spending and ratios do not add to 100% due to rounding.

**Exhibit 5 – Visitor Total Spending by Season by Lodging Type**



## Per-Capita Daily Spending by Season

The per-capita spending levels by season are shown in the next table.

**Table 20 – Seasonal PER-CAPITA Daily Spending Volume by Lodging Type**

Visitor Category	Total	Summer	Fall	Winter	Spring
Rental Condo	\$ 128.91	\$ 95.28	\$ 92.85	\$ 176.16	\$ 106.06
Hotel/Motel/Inn	\$ 112.09	\$ 89.64	\$ 83.49	\$ 200.22	\$ 90.65
Cabin/Campsite/RV/other paid	\$ 46.11	\$ 41.58	\$ 48.71	\$ 131.71	\$ 43.66
Private Homes /other unpaid	\$ 56.70	\$ 32.67	\$ 37.18	\$ 135.10	\$ 37.62
Day Visitors	\$ 28.72	\$ 30.61	\$ 26.57	\$ 32.05	\$ 28.91
Total	\$ 78.58	\$ 54.24	\$ 54.20	\$ 171.00	\$ 71.70

## Multiplier

The estimated \$369.56 million that visitors spent in Mono County during 2008 represents direct level expenditures. Additional levels of spending, indirect spending, accrued within the county from goods and services purchased by the tourism industry and by tourism industry employees using earnings from visitor expenditures. This indirect spending is calculated by a "multiplier" that estimates the extent that such spending circulates through the economy.

Multipliers range from 1.2 to 2.5 in most California areas. Despite Mono County's relative isolation, its relative lack of locally available goods requires many goods to be purchased from sources outside the county. Therefore we estimate Mono County's multiplier at a **1.4**, which when applied to the \$369.5 million of direct visitor spending, yields **an additional \$147.8 million** to the economy, resulting in total direct and indirect spending of **\$517.4 million** for 2008.

Applying this multiplier to the \$369.5 million of direct visitor spending yields **an additional \$147.8 million** to the economy, resulting in total direct and indirect spending of **\$517.4 million** for 2008.

## Tax Impacts

Taxes are realized from direct visitor spending on lodging and taxable retail sales. This study analyzed the tax categories including the transient occupancy (lodging) tax, of which Mono County collects 100% for all transient lodging properties located in county unincorporated areas, and one percentage point of the California and Mono County 7.25% tax on retail goods and services, including meals and beverages out, shopping and incidentals, and (private) transportation expenditures. All admissions fees and some grocery food items and recreational services are tax-exempt and excluded from the calculation.

Note, each incorporated town such as Mammoth Lakes levies and collects its own transient occupancy taxes. The tax figures herein represent “countywide” collections not just for the “County of Mono”.

Other taxes and fees such as business licenses, property and utility taxes, and special fees and assessments levied on visitor serving entities, while important, are outside the scope of this study.

The following Table summarizes the taxes realized throughout Mono County due to visitor/tourism activity and by the state of California from direct visitor spending (based on spending net of taxes).

As shown, a total of \$16.6 million was earned countywide in taxes in 2008 from total taxable visitor spending \$267.8 million. Thus, for each visitor dollar, the county realized 6.2 cents in taxes.

The \$15.1 million of transient occupancy tax accounted for 91% of all visitor-generated taxes, reflecting the fiscal importance of lodging. On this basis, TOT generated \$1.25 million per month, while other direct tourism spending added another \$124,700 each month to the countywide tax base.

Another view is that Mono County has 13,395 households and if the \$16.6 million in visitor-generated taxes countywide were paid by residents, each household would pay an equivalent average of \$1,240 in annual tax revenues now paid by visitors to fund county services benefiting all residents.

**Table 21 - Lodging and Sales Tax Revenues from Visitor Spending**

<b>Taxable Category</b>	<b>Taxable Total Spending</b>	<b>Countywide Tax Revenues</b>	<b>Ratio</b>	<b>State Tax Revenue</b>	<b>Total State &amp; Tax Revenues</b>	<b>Ratio</b>
Lodging	\$ 118,140,000	\$ 15,062,900	91.0%	\$ -	\$ 15,062,900	58.1%
Meals	\$ 54,081,000	\$ 540,800	3.3%	\$ 3,380,100	\$ 3,920,900	15.1%
Beverages	\$ 14,354,000	\$ 143,500	0.9%	\$ 897,200	\$ 1,040,700	4.0%
Shopping/Gifts	\$ 28,737,000	\$ 287,400	1.7%	\$ 1,796,000	\$ 2,083,400	8.0%
Transportation	\$ 23,254,000	\$ 232,500	1.4%	\$ 1,453,400	\$ 1,685,900	6.5%
Recreation equipment/supplies	\$ 15,142,000	\$ 151,400	0.9%	\$ 946,400	\$ 1,097,800	4.2%
Groceries/Incidentals	\$ 14,098,000	\$ 141,000	0.9%	\$ 881,100	\$ 1,022,100	3.9%
<b>Total</b>	<b>\$267,806,000</b>	<b>\$ 16,559,500</b>	<b>100.0%</b>	<b>\$ 9,354,000</b>	<b>\$ 25,913,700</b>	<b>100.0%</b>

Note: admissions are not taxable

## Employment

The actual number of Mono County jobs supported by visitor activity is not readily available and must be extrapolated from other sources. Research from California Tourism <sup>5</sup> indicates visitor spending per

<sup>5</sup> California Travel Impacts By County 1992-2006 and Preliminary 2008 Estimates, Dean Runyan Associates, California Division of Tourism, March, 2008, p. 46

category and typical visitor jobs produced for Mono County. These figures were applied to the 2008 Mono County spending estimates.

Mono County had 7,141 total jobs in 2006. <sup>6</sup> Applying an annual growth rate of .5% for 2006 - 2008 results in an estimated Mono County workforce of 7,212 persons in 2008.

Tourism supported a potential estimated 5,597 Mono County jobs in 2008 based on visitor spending and earnings ratios. At the same time, due to Mono County's seasonality and the part-time nature of many tourism jobs, we have reduced the employment estimate by 25%. Thus, we estimate that in 2008 countywide tourism activity supported nearly 4,500 jobs representing 62% of the countywide workforce, significantly higher than the 5% to 10% rates found in other areas and reflecting the great importance of tourism to the Mono County economy.

**Table 22 - Mono County Jobs Supported by Visitor Spending**

	Mono County Visitor Spending	Visitor Spending to Support One Job	# Mono Co. Jobs (adjusted)	Jobs Ratio
Lodging	\$ 118,140,000	\$ 46,461	2,034	45.4%
Meal service	\$ 63,410,000	\$ 46,461	1,092	24.4%
Admissions/recreation activities	\$ 44,000,000	\$ 79,731	290	9.9%
Beverage service	\$ 16,830,000	\$ 46,461	127	6.5%
transportation/parking	\$ 49,880,000	\$ 193,937	441	4.6%
Recreation Equipment/Supplies	\$ 16,240,000	\$ 79,731	206	3.6%
Shopping/gifts	\$ 30,820,000	\$ 193,937	163	2.8%
Groceries/incidentals	\$ 30,240,000	\$ 193,937	125	2.8%
<b>Total</b>	<b>\$ 369,560,000</b>	<b>\$ 66,023</b>	<b>4,478</b>	<b>100.0%</b>

Source: Lauren Schlau Consulting and State of California Division of Tourism, Travel Impacts By County, 1992-2006 and 2008 Preliminary Estimates, Dean Runyan Associates, March 2008.

Note: The spending to support one job has been inflated to 2008. The jobs have been adjusted to account for seasonality and part-time factors.

<sup>6</sup> California Department of Finance, County Profiles, Mono County

## SECTION 4 - MONO COUNTY VISITOR SERVING ENVIRONMENT

This section discusses Mono County visitor serving infrastructure, including its lodgings, restaurants, recreation, and other amenities that contribute to the county's capacity and attractiveness to visitors.

### MONO COUNTY LODGING MARKET

#### Lodging Supply

The Mono County lodging market contained 8,632 total units in 132 properties <sup>7</sup> considered transient, i.e., at least 80% of guests stay less than 30 days and are "paid" lodgings. A census of Mono County transient lodgings is presented in Appendix 2. The census documents a wide range of offerings from basic outdoor campgrounds and rustic cabins to luxury full-service hotels.

These lodgings are segmented into cabins/campsites and RV sites, hotels, motels and inns, as well as condos, s and other paid lodging. As shown below, about 45% are camping related, 35% are condo units and 20% are hotels/motels/inns.

**Table 22 - Summary of Mono County Lodging Inventory by Type**

Lodging Type	Properties	Daily Units	Ratio
Cabin/Campsite/RV Lodging	59	3,871	44.8%
Hotel Motel Inns	44	1,722	19.9%
Condos/Other Paid	29	3,039	35.2%
<b>Total Market Supply</b>	<b>132</b>	<b>8,632</b>	<b>100.0%</b>

By area, over 3,500 units or 41% of the total inventory are located in Mono County outside Mammoth Lakes, while nearly 5,100 units or 59% are located within the Town of Mammoth Lakes.

**Table 23 - Summary of Mono County Lodging Inventory by Location**

Lodging Type	Daily Units	Ratio
Total Mono County Areas	3,543	41.0%
Total Mammoth	5,089	59.0%
<b>Grand Countywide Total</b>	<b>8,632</b>	<b>100.0%</b>

#### Annual and Seasonal Transient Lodging Supply

On an annualized basis, a total of 2.58 million transient lodging units are available countywide.

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<sup>7</sup> This represents the daily available units. As discussed later, not all rooms were open during the year, thus these percentages vary when annualizing each tier's room ratio.



- ▶ By season, 780,600 units or 30% of the inventory were available in the summer, with 670,000 or 26% each in the Fall and Spring. In the winter just 460,800 or 18%, were available, which is reduced due to weather and lower tourism volume.
- ▶ Not surprisingly, due to weather and types of visitor activities, the unit type varies widely by season. For example, only 4% of campsites/cabins are available in the winter while the number of condos and hotels are generally at the same level throughout the year.
- ▶ By type on an annual basis, most are condos, with 1.1 million or 43% of countywide available units. Another nearly 880,000 or 34% are campsites/cabins, and 587,300 or 23% are hotel/motel rooms.

In comparing units by area, Mono County (excluding Mammoth Lakes) has about one-third or 866,500 of the annual available units while Mammoth Lakes has 1.7 million units. Most of the condos as well as the larger hotels are located in Mammoth Lakes contributing to its higher unit inventory.

**Table 24a – Annual Lodging Supply By Type – Number of Units**

	Annual	Summer	Fall Avail.	Winter	Spring
<b>By Type</b>					
Cabin, Campsite/RV	879,194	356,132	249,078	38,584	235,400
Hotel/Motel/Inn	587,324	144,900	140,727	145,691	156,006
Condo	1,112,150	279,588	276,425	276,549	279,588
<b>Total Market Supply</b>	<b>2,578,668</b>	<b>780,620</b>	<b>666,230</b>	<b>460,824</b>	<b>670,994</b>
<b>By Area</b>					
Mono Co. Areas	866,573	325,956	241,485	66,248	232,884
Mammoth Lakes	1,712,095	454,664	424,745	394,576	438,110
<b>Total Market Supply</b>	<b>2,578,668</b>	<b>780,620</b>	<b>666,230</b>	<b>460,824</b>	<b>670,994</b>

**Table 24b – Annual Lodging Supply By Type – Ratio of Units**

	Annual	Summer	Fall	Winter	Spring
<b>By Type</b>					
Cabin/Campsite/RV	34.1%	40.5%	28.3%	4.4%	26.8%
Hotel/Motel/Inn	22.8%	24.7%	24.0%	24.8%	26.6%
Condo	43.1%	25.1%	24.9%	24.9%	25.1%
<b>Annual Ratio</b>	<b>100.0%</b>	<b>30.3%</b>	<b>25.8%</b>	<b>17.9%</b>	<b>26.0%</b>
<b>By Area</b>					
Mono Co. Areas	33.6%	37.6%	27.9%	7.6%	26.9%
Mammoth Lakes	66.4%	26.6%	24.8%	23.0%	25.6%

**Transient Lodging Rooms Demand**

**Lodging Supply and Demand by Lodging Type**

Specific lodging demand and rate performance data shown in the table below are based on a survey of lodging managers conducted for this study.

- Countywide, Mono County achieved an annual 39.2% occupancy rate and a daily average unit rate of \$118.60.
- With fewer available units, Mono County (excluding Mammoth Lakes) annual occupancy rate was 51% with nearly 442,900 units sold versus 33% with 567,600 units sold for Mammoth Lakes. However, this may be somewhat misleading as virtually all properties in Mammoth Lakes are open year-round, whereas the many closed in Mono County have been removed from the inventory.
- By type, cabin/campsites and hotel/motel occupancy rates were comparable at 48% although not surprisingly with far different room rates of \$35.00 and \$123.50, respectively. Conversely, the condos operated at 27.7% with a \$227.59 average rate.

**Table 25 - Mono County Lodging Market Performance Summary**

Factor	By Type				By Area	
	County wide	Cabin/ Camp/RV	Hotel/ motel/inn	Condo Other	Mono County	Mammoth Lakes
Annual Available Units*	2,578,668	879,194	587,324	1,112,150	866,573	1,712,095
Ratio of Available Units	100.0%	34.1%	22.8%	43.1%	33.6%	66.4%
Annual Occupied Units	1,010,504	418,182	283,893	308,429	442,852	567,630
Ratio of Occupied Units	100.0%	41.4%	28.1%	30.5%	43.8%	56.2%
Avg. Occupancy Rate	39.2%	47.6%	48.3%	27.7%	51.1%	33.2%
Avg. Daily Rate (ADR)	\$ 118.60	\$ 34.89	\$ 123.51	\$ 227.59	\$ 48.85	\$ 173.02

Source: Mono County Lodging Properties and Lauren Schlau Consulting

\* Accounts for units closed during the year for seasonality factors, renovation or other factors.

**Seasonality of Lodging Demand**

A key objective of the lodging survey is to measure room demand by season to discern seasonal patterns. This study used four seasons, June – August, September - November, December – February, and March – May, matching the on-site interviewing periods and natural seasons.

- Overall, occupancy varies significantly between seasons, not surprising for a destination like Mono County with major climate changes throughout the year.
- Overall, countywide demand peaked in the summer at 52.9% occupancy with 413,100 occupied units and 40% of the total annual units demand.

- Winter was next highest at 44.6% occupancy, but due to the closures, was third in terms of demand at 205,700 units behind spring with nearly 211,000 units.
- Spring occupancy was third at 31% followed by Fall at 27%.
- Occupancy and demand varied between Mono County and Mammoth Lakes. While more units/rooms were sold in Mammoth Lakes, 567,630 versus 442,852 for Mono County (excluding TOML), Mono County lodging achieved a higher annual occupancy rate, 51% versus 33% for Mammoth Lakes. This may be partially due to the fact that more lodging is closed in Mono County.

**Table 26a - Mono County Lodging Demand – by Occupied Units (FY 2008)**

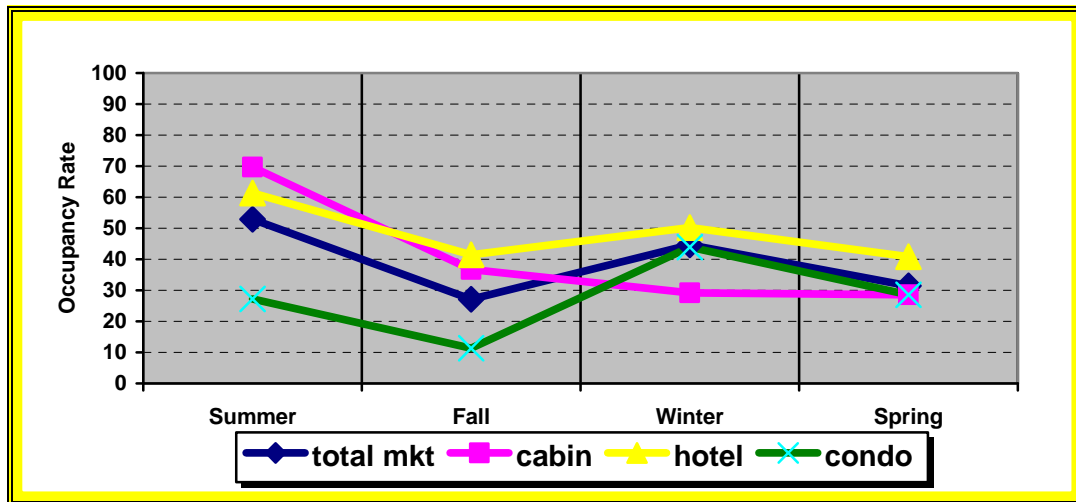
Property	Annual	Summer	Fall	Winter	Spring
<b>By Type</b>					
Cabin/Camp/RV	418,182	248,264	91,295	11,275	67,349
Hotel/Motel/Inn	283,893	88,842	58,272	73,099	63,680
Condo/Other Paid	308,429	76,020	31,104	121,354	79,952
<b>Countywide Total Demand</b>	<b>1,010,504</b>	<b>413,126</b>	<b>180,670</b>	<b>205,727</b>	<b>210,981</b>
<b>Ratio Of Demand</b>	<b>100.0%</b>	<b>40.9%</b>	<b>17.9%</b>	<b>20.4%</b>	<b>20.9%</b>
<b>By Area</b>					
Total Mono County Areas (excl. TOML)	442,852	240,670	103,215	19,960	79,007
Total Mammoth Lakes	567,630	172,456	77,433	185,767	131,974

**Table 26b - Mono County Lodging Demand – by Occupancy Rate (FY 2008)**

Property	Annual	Summer	Fall	Winter	Spring
<b>By Type</b>					
Cabin/Camp/RV	47.6%	69.7%	36.7%	29.2%	28.6%
Hotel/Motel/Inn	48.3%	61.3%	41.4%	50.2%	40.8%
Condo/Other Paid	27.7%	27.2%	11.3%	43.9%	28.6%
<b>Countywide Total Occupancy Rate</b>	<b>39.2%</b>	<b>52.0%</b>	<b>27.1%</b>	<b>44.6%</b>	<b>31.4%</b>
<b>By Area</b>					
Total Mono County Areas (excl. TOML)	51.1%	73.8%	42.7%	30.1%	33.9%
Total Mammoth Lakes	33.2%	37.9%	18.2%	47.1%	30.1%

Source: Mono County Lodging Properties and Lauren Schlau Consulting

**Exhibit 6 - Lodging Occupancy Rate By Type by Season**



**Room Rate**

- Overall, countywide lodgings achieved an average rate per night of \$118 in 2008.
- The rate varied by lodging type, ranging from \$228 per night for condos and \$123 for hotels/motels to \$43 for cabins/campsites.
- The overall rate also varied by season, ranging from \$56 in the Fall to \$236 in the Winter, mainly due to the impact of condo lodging.
- The rate by area shows Mammoth Lakes at \$173 for the year versus \$48 for Mono County areas, sharply reflecting the impact of higher rate condos and hotels concentrated in Mammoth Lakes versus lower rate campsites, cabins and smaller motels concentrated in the county areas.

**Table 28 - Mono County Lodging Demand – by Average Rate (FY 2008)**

Property	Annual	Summer	Fall	Winter	Spring
<b>By Type</b>					
Cabin/Camp/RV	\$ 34.89	\$ 34	\$ 25	\$ 126	\$ 38
Hotel/Motel/Inn	\$ 123.51	\$ 102	\$ 68	\$ 178	\$ 142
Condo/Other Paid	\$ 227.59	\$ 168	\$ 125	\$ 281	\$ 243
<b>Countywide Total Average Daily Rate</b>	<b>\$ 118.60</b>	<b>\$ 73</b>	<b>\$ 56</b>	<b>\$ 236</b>	<b>\$ 147</b>
<b>By Area</b>					
Total Mono County Areas (excl. TOML)	\$ 48.85	\$ 48	\$ 35	\$ 122	\$ 52
Total Mammoth Lakes	\$ 173.02	\$ 108	\$ 84	\$ 248	\$ 204

## **Visitor Serving Amenities**

In addition to lodgings, Mono County offers a wide range of amenities and activities to its visitors, which in combination create the destination experience that is Mono County. These amenities are also important as they not only attract visitors but are instrumental to generating economic impact.

First and foremost, Mono County is recognized for its scenery, fresh air, and majestic natural wonders from snowy mountain peaks and pristine fresh water lakes to natural hot springs and forest trails. These natural wonders create opportunities for a myriad of outstanding outdoor recreational activities available on a year-round basis, although of course vary by season.

Featured unique natural wonders include Mono Lake with its geological tufa towers and Devil's Postpile located in Red's Meadow. A noted historic site is the Bodie State Park a preserved mining town.

While extremely popular as a winter ski resort centered in Mammoth Lakes and June Lake, the area has worked to enhance its appeal in other seasons. Mono County summers attract visitors from around the world to view the scenery hike, take photographs, camp, fish and bird watch among other activities. It is also heavily traveled as the eastern gateway to Yosemite National Park. The Fall offers brilliant fall tree colors rivaling those seen in New England, and in the spring, the area is heavily patronized for its excellent fishing and other related activities.

To support visitor activity the area boasts a range of dining establishments and retail outlets with new and antique items throughout the county.

## SECTION 5

### PROFILE OF VISITOR BEHAVIOR & TRIP CHARACTERISTICS

Visitor characteristics and visitor behavior affect economic indicators, which in turn are used to measure the county's viability as a visitor destination. The responses from visitors interviewed when intercepted provide the basis for identifying visitors' behavioral and demographic profile. Additionally, they provide the basis for the economic model used to estimate tourism's impacts in the county.

In this section, each survey question is summarized with an adjoining table, in order of visitors' trip planning, actions/activities and spending while in Mono County, and demographics. The categories across the top of each table are specific visitor sub-segments as follows:

Factor	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo

- *Total* signifies all respondents
- *So. Cal* represents all Mono County visitors residing in Southern California
- *Cntr. Cal* represents all Mono County visitors residing in Central California
- *Nor. Cal* represents all Mono County visitors residing in Northern California
- *U.S.* represents all Mono County visitors who reside in the United States, *excluding* Californians
- *Int'l* represents all Mono County visitors residing outside the United States
- *Day* are visitors in Mono County for the day only, not staying overnight in the city
- *Camp-tent* are visitors staying overnight in a Mono County tent campground
- *Camp-RV* are visitors staying overnight in Mono County in an RV campground
- *Hotel/Motel* are visitors staying overnight in a Mono County hotel or motel
- *Rent/Condo* are visitors staying overnight in Mono County in a rental condominium

For each table in this section, a " + " (plus) or a " - " (minus) sign next to a reported percentage figure indicates a significantly higher or lower value respectively between the compared item and the Total, tested to the 0.95 significance level. The sample size of 1,214 total respondents has a margin of error of ± 3.4% for responses at the 50% level, the highest level of variance.

## Profile of a Typical Visitor to Mono County

Table 28 presents key Mono County visitor characteristics based on the visitor intercept survey. This profile should be viewed as an overall composite, not a precise description.

**Table 28 - Overall Profile of Mono County Visitors**

Characteristic	All Mono County Visitors
% of Total Visitors in Segment <sup>1</sup>	100.0%
% Californians (of total visitors)	70.7%
% International Resident	10.8%
% Have Visited in past 3 Years	64.1%
Avg. # Visits to MC in Past 3 Years (by those who visited)	5.17
% Mono County Day Visitors	35.6%
Avg. Nights Stay in MC (all visitors)	2.49
Avg. Nights Stay in MC (overnighters) <sup>2</sup>	3.82
% Used Lodging's Internet web-site to reserve Mono lodging <sup>3</sup>	26.4%
Avg. Number of Weeks in Advance reserved lodging	7.48
% Mono County is Main Destination	65.4%
Satisfaction Rating (5= highest – 1 = lowest)	4.66
Average # Persons in travel group	3.79
Median Respondent Age (years)	48.27
Median Annual Household Income	\$92,600

<sup>1</sup>Pleasure includes vacation/leisure, sightseeing/entertainment and outdoor recreation.

### Visitor Behavior

#### Previous Visits to Mono County

- Close to two-thirds or 64% had previously visited Mono County in the past three years.
- Visitors from Central California and Southern California were more likely to be repeat visitors at 83% and 76%, respectively.
- Conversely, International visitors were more likely to be first-time visitors with 85% having never visited Mono County in the past three years.

**Table 29 – Prior Visitation to Mono County (Past Three Years)**

Prior Visitation to Mono County	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Yes – Repeat visitor	64.1%	76.4%+	82.7%+	65.2%	52.1%-	14.7%-	57.9%	70.8%	65.8%	58.3%	69.6%
No – First-time visitor	35.9%	23.6%-	17.3%-	34.8%	47.9%+	85.3%+	42.1%	29.2%	34.2%	41.7%	30.4%

- Repeat visitors had previously visited Mono County an average of 5.2 times in the past three years or the equivalent of almost twice annually.
- Visitors from Central California were the most frequent visitors at 15.4 times in the past three years or the equivalent of five times annually, and day visitors visited more than thrice annually or 9.5 times in the three year period. Not surprisingly, International visitors had only visited 2.4 times in the past three years.

**Table 30 – Number of Prior Visits to Mono County (Past Three Years)**

Number of Prior Visits	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base: Visited Mono County</b>	<b>828</b>	<b>457</b>	<b>104</b>	<b>119</b>	<b>114</b>	<b>34</b>	<b>107</b>	<b>87</b>	<b>61</b>	<b>187</b>	<b>175</b>
1 time	15.9%	16.6%	3.5%-	16.3%	23.4%	28.9%	18.5%	14.5%	9.1%	23.4%	13.9%
2-3 times	30.3%	32.6%	23.8%	40.0%	14.1%-	53.5%+	20.5%-	39.4%	56.8%+	40.0%	33.0%
4-5 times	11.5%	12.5%	6.8%-	9.6%	14.7%	11.9%	6.8%-	16.8%	8.4%	15.0%	10.5%
6-9 times	15.3%	17.0%	7.7%-	17.5%	17.2%	0.0%	15.1%	18.2%	19.7%	9.8%-	16.0%
10+ times	27.0%	21.3%-	58.3%+	16.6%-	30.6%	5.8%-	39.0%+	11.2%-	6.0%-	11.8%-	26.6%
<b>Mean:</b>	<b>5.17</b>	<b>4.87</b>	<b>15.42+</b>	<b>4.05</b>	<b>4.89</b>	<b>2.42-</b>	<b>9.45+</b>	<b>4.09</b>	<b>3.42-</b>	<b>3.31-</b>	<b>5.17</b>



### Initial Awareness of Mono County

- More than four in ten or 45% of visitors first heard about Mono County from their own experience while 42% heard about the area from a relative or friend.
- Still another 3% each had heard about Mono County from a destination website or a newspaper or magazine ad or story.
- More than one-half or 54% of Southern Californians first heard about Mono County from a relative or friend.
- Not surprisingly, 13% of International residents first heard about Mono County from their travel agent.

**Table 31 - Sources First Heard about Mono County**

Sources of Initial Awareness	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Own experience/ been here before	45.0%	44.7%	61.1%+	51.6%	47.0%	16.2%-	52.2%+	47.2%	59.7%+	30.3%-	42.5%
Family member/ friend	42.3%	54.0%+	40.6%	40.5%	31.1%-	19.5%-	25.2%-	48.7%	42.2%	38.4%	61.0%+
Any destination Web site	3.4%	0.6%-	0.0%	8.5%	4.4%	9.3%	5.8%	2.1%	2.5%	4.6%	0.7%-
Newspaper or magazine ad or story	2.7%	1.6%	0.6%-	1.9%	3.1%	9.7%	2.1%	2.2%	0.0%	8.7%+	0.0%
Travel Agent	1.4%	0.0%	0.0%	0.0%	0.2%-	12.9%+	0.0%	0.5%	0.0%	5.8%+	1.7%
Any destination Visitor Guide	1.3%	0.8%	0.0%	0.1%-	0.6%	7.6%+	2.1%	0.0%	0.0%	1.1%	0.9%
Hotel or lodging	0.9%	0.2%	0.0%	0.1%-	2.8%	2.3%	0.7%	0.0%	0.0%	2.2%	0.5%
Retail or Auto Club Guide book	0.8%	0.3%	0.0%	0.0%	0.4%	5.5%	0.7%	0.7%	0.0%	2.2%	0.4%
Tour Operator	0.8%	1.5%	0.0%	0.0%	0.1%	1.1%	1.8%	0.2%	0.0%	0.6%	0.0%
General travel website like travelocity.com	0.7%	0.2%	0.0%	0.0%	2.0%	2.6%	0.0%	0.0%	0.0%	2.6%	1.5%
A Mono County Chamber of Commerce or visitor bureau	0.7%	1.5%	0.0%	0.1%	0.0%	0.0%	1.5%	0.0%	0.0%	0.2%	0.0%
Direct mail or e-mail from a Mono County venue/ destination	0.4%	0.1%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.2%
Mono County booth at a travel show	0.2%	0.4%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.5%	0.0%
Other	7.0%	5.0%	5.5%	3.7%-	12.8%	11.4%	9.0%	6.5%	1.1%-	11.8%+	2.6%-
Don't know/ No particular source	4.9%	2.9%-	4.2%	5.7%	5.3%	11.6%	6.0%	6.0%	3.4%	6.7%	3.9%

### Trip Planning Sources

Visitors indicated how they obtained Mono County information when planning their trips and their information sources once in the area as follows.

- Among Mono County visitors, 43% obtained area information from their own previous experience followed by 32% who obtained their information about Mono County from friends/relatives. Another 29% used different types of Internet web sites including destination web sites or general travel websites such as Travelocity.com.
- Although only 2% of all visitors relied on a travel agent, 13% of International visitors used a travel agent to gather information, as did 5% of hotel/motel guests.

**Table 32 - Sources of Mono County Information – When Planning Trip**

Sources of Information	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Own experience/ been here before	42.9%	43.9%	52.4%	55.5%+	43.7%	9.4%-	47.7%	50.1%	54.9%	24.5%-	44.0%
Family member/ friend	32.0%	39.8%+	33.2%	27.4%	27.7%	13.5%-	21.2%-	40.2%	29.3%	26.8%	41.4%+
<b>Net: Internet Web Sites</b>	<b>28.9%</b>	<b>30.1%</b>	<b>19.5%</b>	<b>25.2%</b>	<b>25.6%</b>	<b>44.7%</b>	<b>20.1%</b>	<b>26.9%</b>	<b>30.8%</b>	<b>42.0%</b>	<b>34.5%</b>
Any destination Web site	26.9%	28.7%	19.2%	24.8%	23.1%	37.0%	19.9%-	26.0%	30.8%	37.4%+	32.5%
Retail or Auto Club Guide book	4.2%	3.8%	1.1%-	1.3%-	6.4%	9.7%	4.3%	9.4%	9.5%	4.2%	0.6%-
Hotel or lodging	3.5%	3.6%	1.0%-	3.5%	5.4%	2.5%	1.8%-	0.3%-	0.2%-	9.6%+	3.2%
Newspaper or magazine ad or story	3.5%	2.8%	4.2%	1.8%	4.7%	5.8%	2.0%	3.2%	1.9%	8.5%	3.1%
Any destination Visitor Guide	3.4%	1.7%-	1.2%-	4.5%	4.5%	9.0%	4.9%	1.6%	1.2%	3.7%	1.8%
Tour Operator	2.2%	2.7%	5.8%	1.1%	0.3%-	1.6%	3.7%	3.0%	0.0%	3.0%	0.5%-
A Mono County Chamber of Commerce or visitor bureau	2.2%	3.1%	0.6%-	0.5%-	3.5%	0.7%-	0.4%-	3.5%	1.5%	4.5%	4.9%
General travel website like travelocity.com	2.0%	1.4%	0.3%-	0.4%-	2.5%	7.7%+	0.2%-	0.9%	0.0%	4.6%	2.0%
Travel Agent	1.7%	0.5%-	0.0%	0.0%	0.4%-	13.0%+	0.5%-	1.4%	0.0%	5.3%+	2.3%
Mono County booth at a travel show	0.8%	0.9%	0.0%	0.0%	2.0%	0.7%	0.0%	3.7%	0.0%	2.2%	0.7%
Direct mail or e-mail from a Mono County venue/ destination	0.6%	0.4%	0.0%	0.8%	0.1%	2.2%	0.0%	0.0%	0.0%	2.1%	1.0%
Other	4.1%	6.2%	2.8%	0.6%-	1.5%-	6.9%	2.7%	0.7%-	1.6%-	3.6%	11.0%+
None	13.8%	13.1%	7.9%	6.3%-	18.5%	25.2%+	10.8%	12.6%	9.3%	15.6%	20.9%+

Note: For each table throughout the remainder of this report, a +/- indicates a significantly higher/ lower value between the compared item and the "Total", tested to the 0.95 significance level. In addition, table column headings represent Mono County visitors; e.g., Hotel is a hotel guest staying only in a Mono County hotel.

- Of the Mono County visitors who used a web site, visitor guide or chamber of commerce to obtain information, 32% used that of Mammoth Lakes followed by 21% who used California Tourism, 17% used Mammoth Mountain, 13% used June Lake, and 12% used Mono County.
  - Close to two-thirds or 64% of Central California residents used Mammoth Lakes while 51% of Northern Californians and 48% of day visitors used California Tourism.

### Trip Purpose to Mono County

- The main purpose for visiting **Mono County** was for vacation/pleasure/to visit, by 39%, with another 29% for outdoor recreation and 10% for sightsee/exploring the area, thus in total 78% are considered "leisure" visitors.
- Another 13% were in Mono County because they were passing through to another place.
  - Northern California visitors and other U.S. visitors were more likely to be passing through at 27% and 22%, respectively.
- By season as shown in Table 33b, far more winter visitors than for any other season, 82% were in the area for outdoor recreation. Many Fall visitors, 20% came to explore the area, suggesting that they were viewing Fall colors.

**Table 33a - Main Purpose for Visiting Mono County**

Main Purpose / Reason	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Vacation/ pleasure/ to visit	38.7%	36.7%	28.8%-	35.9%	37.6%	63.4%+	28.7%-	38.4%	61.5%+	42.3%	38.4%
Outdoor recreation	29.1%	43.0%+	27.0%	17.5%-	20.4%-	7.9%-	10.4%-	49.1%+	21.6%	31.7%	51.4%+
Passing through to another place	12.8%	3.6%-	11.1%	26.6%+	22.2%+	14.5%	31.4%+	2.0%-	2.4%-	6.4%-	0.0%
Sightseeing or Explore the area	10.4%	10.4%	15.9%	9.2%	8.4%	9.7%	14.1%+	10.3%	11.1%	11.1%	5.6%-
To conduct business or attend a meeting/ conference	2.6%	0.6%-	9.4%	3.9%	2.6%	1.8%	6.1%+	0.2%-	1.1%	1.2%	0.0%
To visit relatives/ friends/ personal visit	2.3%	2.5%	3.3%	0.2%-	3.8%	1.2%	4.1%	0.0%	1.5%	0.2%-	1.1%
Combining business or meeting and pleasure	1.4%	1.1%	4.0%	0.6%	1.2%	1.6%	1.1%	0.0%	0.5%-	3.3%	1.6%
To attend a special event - festival	0.7%	1.4%+	0.0%	0.1%-	0.3%	0.0%	0.0%	0.0%	0.0%	2.2%	1.1%
To attend a special event - tournament or contest	0.2%	0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	1.1%	0.0%
Other	1.7%	0.3%	0.0%	6.1%	3.3%	0.0%	4.1%+	0.0%	0.0%	0.5%	0.7%

**Table 33b - Main Purpose for Visiting Mono County – By Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Vacation/pleasure/ to visit	38.7%	42.9%	31.6%	13.7%-	58.7%+
Outdoor recreation	29.1%	19.7%-	20.0%-	81.7%+	20.8%-
Passing through to another place	12.8%	17.1%	16.7%	0.0%	8.6%
Sightseeing or Explore the area	10.4%	8.4%	20.1%+	1.2%-	7.7%
To conduct business or attend a meeting/ conference	2.6%	1.1%-	6.7%+	1.3%	1.1%
To visit relatives/ friends/ personal visit	2.3%	4.5%	0.5%-	0.9%	1.7%
Combining business or meeting and pleasure	1.4%	0.9%	2.6%	1.0%	1.2%
To attend a special event - festival	0.7%	1.7%+	0.0%	0.1%-	0.2%-
To attend a special event - tournament or contest	0.2%	0.0%	0.7%	0.0%	0.1%
Other	1.7%	3.7%	1.1%	0.0%	0.0%

***Other Purposes***

In addition to the main purpose, other purposes for visiting Mono County are as follows:

- Sightseeing/exploring the area was the most frequent reason, by 64% of the total, and by 78% of tent campers and 77% of RV campers.
- Another 42% were in Mono County for vacation/pleasure/visit and 37% for outdoor recreation.
- In addition, 16% were in Mono County because they were passing through to another place and 9% were visiting friends/family.

**Table 33c - Other Purposes of Visit in Mono County**

Other Purpose / Reason	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Sightseeing or Explore the area	63.7%	63.8%	54.4%	60.5%	65.5%	74.4%	52.7%-	77.5%+	77.3%+	65.7%	65.7%
Vacation/ pleasure/ to visit	41.9%	49.9%+	36.2%	38.2%	42.2%	21.2%-	35.3%	57.1%+	34.8%	41.3%	54.7%+
Outdoor recreation	36.5%	39.6%	26.8%	41.8%	34.7%	29.8%	28.1%-	45.5%	66.8%+	30.8%	36.0%
Passing through to another place	16.1%	8.8%-	19.3%	16.1%	17.1%	40.5%+	31.4%+	10.9%	7.6%	12.3%	2.7%-
To visit relatives/ friends/ personal visit	9.1%	11.0%	4.9%-	2.9%-	11.0%	11.5%	5.8%	17.6%+	5.7%	4.6%-	9.8%
Combining business or meeting and pleasure	3.5%	3.0%	6.5%	2.8%	3.4%	3.3%	4.4%	0.2%-	1.6%	2.9%	2.1%
To attend a special event - festival	2.4%	3.2%	5.1%	1.7%	0.7%-	0.2%-	2.5%	2.8%	0.7%-	0.4%-	2.0%
To conduct business or attend a meeting/ conference	1.3%	0.8%	1.8%	1.3%	0.8%	3.8%	1.2%	0.0%	0.0%	3.0%	1.3%
To attend a special event - tournament or contest	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	2.0%	0.7%-	4.0%	3.8%	3.4%	0.5%-	3.5%	0.8%	0.0%	2.0%	1.2%
None/ No other purpose	5.9%	4.4%	7.2%	5.8%	8.1%	6.7%	10.8%+	0.0%	0.9%-	4.7%	4.6%

\* Adds to more than 100% due to multiple responses

**Table 33d - Other Purposes of Visit in Mono County – By Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Sightseeing or Explore the area	63.7%	61.5%	68.2%	50.5%-	71.3%+
Vacation/ pleasure/ to visit	41.9%	38.0%	40.0%	69.7%+	31.7%-
Outdoor recreation	36.5%	39.8%	37.0%	13.8%-	46.4%+
Passing through to another place	16.1%	8.4%-	32.7%+	1.4%-	19.1%
To visit relatives/ friends/ personal visit	9.1%	9.3%	6.3%	11.9%	10.2%
Combining business or meeting and pleasure	3.5%	1.2%-	5.7%	1.7%	6.0%
To attend a special event - festival	2.4%	1.8%	1.2%	0.2%-	6.6%
To conduct business or attend a meeting/ conference	1.3%	0.2%-	1.7%	0.1%-	3.7%
To attend a special event - tournament or contest	0.1%	0.0%	0.0%	0.6%	0.0%
Other	2.0%	3.3%	2.6%	0.0%	0.4%-
None/ No other purpose	5.9%	8.5%	2.9%	10.8%+	1.3%-

### Main Destination and Other Destination Areas

The following narrative and two tables discuss and present Mono County visitors' main and other destinations on this trip.

- Mono County was the main destination for 65% of all Mono County visitors, but particularly so for 90% of visitors who rented condos and 83% of Southern California residents.
- Yosemite National Park was the main destination for 9% of all Mono County visitors and for 26% of International visitors and 17% of other U.S. residents.
- Another 7% indicated Reno, Tahoe or Las Vegas was their main destination.
- International visitors and day visitors were less likely to call Mono County their main destination; rather they were visiting a wider variety of areas.
- By season, Mono County was the main destination for most Winter visitors, 94%, as well as for over 60% of Spring and Summer visitors.
  - A notable share of Fall visitors, 17% named Yosemite as their main destination.

**Table 34a - Main Destination of This Trip**

Main Destination Area	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
<b>Mono County</b>	<b>65.4%</b>	<b>83.0%+</b>	<b>77.3%</b>	<b>58.5%</b>	<b>47.2%-</b>	<b>24.5%-</b>	<b>36.2%-</b>	<b>82.2%+</b>	<b>77.4%+</b>	<b>68.8%</b>	<b>90.0%+</b>
Yosemite National Park	9.1%	2.6%-	3.2%-	10.4%	17.1%+	26.2%+	15.5%+	6.4%	7.5%	12.2%	0.8%-
Reno, Tahoe or Las Vegas Nevada	7.4%	4.5%	2.9%-	13.6%	12.1%	6.9%	18.2%+	0.5%-	1.6%-	4.5%	0.0%
Other Eastern Sierra areas along Highway 395	3.9%	3.6%	5.3%	5.0%	2.5%	4.0%	6.3%+	4.6%	2.1%	2.1%	1.8%-
Southern California (Santa Barbara to San Diego)	2.8%	0.5%-	3.2%	3.3%	8.0%	2.0%	5.7%+	0.5%-	1.2%	2.9%	0.0%
Other Nevada or Western States	2.6%	2.9%	4.2%	2.9%	1.4%	1.2%	6.5%+	0.0%	3.4%	0.0%	0.0%
Other Northern California area (SFO, Tahoe, etc.)	2.5%	0.5%-	1.3%	2.4%	1.7%	13.4%+	3.9%	0.9%	1.1%	4.5%	0.9%
All California	2.2%	0.1%-	1.7%	0.5%-	4.5%	9.7%+	2.4%	1.8%	0.2%-	1.2%	4.6%
California and/or other Western States	1.9%	1.6%	0.2%-	2.4%	1.0%	5.0%	3.4%	0.7%	1.0%	1.0%	1.0%
USA (California plus other areas)	1.0%	0.0%	0.0%	0.8%	1.9%	4.3%	1.2%	0.2%	4.2%	0.9%	0.2%
Death Valley	0.1%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
All other areas (not listed above)	0.7%	0.5%	0.0%	0.0%	1.3%	1.9%	0.5%	0.9%	0.0%	1.3%	0.6%
None; no others	0.5%	0.2%	0.8%	0.0%	1.2%	0.8%	0.2%	1.4%	0.2%	0.5%	0.3%

**Table 34b - Main Destination of This Trip – by Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Mono County	65.4%	61.8%	56.0%-	94.2%+	64.2%
Yosemite National Park	9.1%	8.2%	17.0%+	0.0%	6.9%
Reno, Tahoe or Las Vegas Nevada	7.4%	9.9%	9.7%	0.8%-	4.5%
Other Eastern Sierra areas along Highway 395	3.9%	3.1%	4.0%	0.0%	7.9%+
Southern California (Santa Barbara to San Diego)	2.8%	3.2%	3.9%	0.7%-	2.1%
Other Nevada or Western States areas	2.6%	5.1%	0.8%	1.9%	0.6%
Other Northern California area (SFO, Tahoe, etc.)	2.5%	3.0%	3.9%	1.0%	0.8%-
All California	2.2%	0.3%-	2.1%	0.0%	7.5%+
California and/or other Western States	1.9%	3.5%	1.0%	0.3%-	1.0%
USA (California plus other areas)	1.0%	0.6%	0.7%	0.2%	2.5%
Death Valley	0.1%	0.0%	0.2%	0.0%	0.2%
All other areas (not listed above)	0.7%	0.2%	0.7%	1.0%	1.2%
None - no other areas	0.5%	1.0%+	0.0%	0.0%	0.5%

### Other Areas Visited

Some Mono County visitors were visiting Mono County as their main destination while others were not. These visitors also went to other areas on their trips, as follows.

- One-half or 51% of Mono County visitors not visiting Mono County as their main destination cited Mono County as another area they visited. This was particularly strong among International residents, 75%, and day visitors, 61%.
- Another one-half or 48% of visitors were also visiting other Eastern Sierra areas along Highway 395 and 16% were also visiting Yosemite National Park.
- International visitors, as is typical, tend to visit multiple destinations, as reflected below.
- Mono County tent campers were less likely to be visiting other destinations.

**Table 34c - Other Areas Visiting This Trip**

Other Destination Areas	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
<b>Mono County</b>	<b>51.1%</b>	<b>50.3%</b>	<b>35.5%-</b>	<b>48.4%</b>	<b>50.9%</b>	<b>75.1%+</b>	<b>60.5%+</b>	<b>26.9%-</b>	<b>32.5%-</b>	<b>54.5%</b>	<b>57.4%</b>
Other Eastern Sierra areas along H'way. 395	48.0%	45.3%	54.5%	49.8%	42.2%	59.2%	51.1%	32.6%-	36.1%	49.7%	44.1%
Yosemite National Park	16.1%	10.0%-	11.5%	23.5%	14.7%	36.5%+	15.8%	24.1%	11.3%	17.9%	15.0%
Reno, Tahoe or Las Vegas Nevada	11.3%	7.0%-	4.8%-	16.5%	11.2%	27.9%+	14.9%+	5.5%-	25.1%+	13.1%	5.3%-
Southern California areas (Santa Barbara to San Diego)	9.9%	11.9%	8.6%	1.8%-	7.4%	19.1%+	5.2%-	3.0%-	4.0%-	15.5%+	21.2%+
Other Northern California area (SFO, Tahoe, etc.)	6.8%	2.2%-	6.1%	11.1%	7.2%	19.0%+	9.7%	5.3%	4.8%	8.8%	3.6%
Death Valley	4.7%	1.7%-	1.4%-	2.2%	5.8%	21.7%+	4.8%	3.8%	6.6%	5.2%	5.9%
California and/or other Western States	4.2%	1.4%-	3.4%	3.1%	3.8%	18.9%+	5.5%	4.4%	8.9%	5.7%	0.3%-
All California	3.7%	1.9%	0.2%-	1.9%-	5.1%	14.7%+	4.4%	2.4%	0.9%-	3.5%	5.6%
Other Nevada or Western States areas	3.2%	0.2%-	0.6%-	6.5%	6.4%	7.9%	7.5%+	1.4%	2.7%	0.9%	0.0%
USA (California plus other areas)	2.7%	0.1%-	1.2%	1.6%	2.7%	16.5%+	5.7%	1.2%	1.0%	2.7%	0.2%-
All other areas (not listed above)	2.0%	1.5%	6.2%	0.0%	1.2%	3.8%	3.4%	0.7%	1.2%	1.4%	0.7%
None - no other areas	17.8%	20.0%	20.0%	13.6%	23.9%	3.0%-	14.1%	39.5%+	26.1%	14.5%	18.2%

**Table 35d - Other Areas Visiting This Trip**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Mono County	51.1%	33.3%-	39.2%-	85.3%+	76.1%+
Other Eastern Sierra areas along Highway 395	48.0%	27.5%-	82.9%+	47.7%	40.0%
Yosemite National Park	16.1%	17.8%	16.5%	0.2%-	23.7%+
Reno, Tahoe or Las Vegas Nevada	11.3%	9.3%	14.9%	6.5%-	13.8%
Southern California areas (Santa Barbara to San Diego)	9.9%	2.0%-	7.1%-	43.7%+	3.8%-
Other Northern California area (SFO, Tahoe, etc.)	6.8%	6.2%	11.9%+	2.0%-	4.6%
Death Valley	4.7%	2.0%-	6.5%	0.0%	10.8%+
California and/or other Western States	4.2%	5.1%	3.6%	0.7%-	6.1%
All California	3.7%	1.9%-	1.4%-	0.5%-	12.4%+
Other Nevada or Western States areas	3.2%	4.9%	3.4%	0.2%-	2.0%
USA (California plus other areas)	2.7%	2.0%	4.3%	0.4%-	3.7%
All other areas (not listed above)	2.0%	3.9%	0.1%-	0.2%	2.2%
None - no other areas	17.8%	33.9%+	9.6%-	10.7%-	3.8%-



### Transportation – Getting Around Mono County

- The overwhelming majority, 91%, of visitors used a driven vehicle to get around Mono County with 76% using a personal vehicle and 15% driving a rental vehicle.
- Another 5% used a recreational vehicle (RV) around the area and 3% rode in a tour van or bus.
- International visitors were more likely to drive a rental vehicle at 82% and 68% of day visitors drove their personal vehicle compared to any other form of transportation.

**Table 35 - Transportation Mode to Get Around Mono County**

Mode to Get Around Mono County	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Personal vehicle	75.6%	87.0%+	82.3%	84.1%	72.7%	15.9%-	68.0%-	83.2%	72.1%	70.0%	84.1%+
Rental vehicle	14.9%	4.7%-	1.2%-	5.0%-	16.9%	81.7%+	18.6%	2.5%-	9.8%	25.9%+	11.0%
Recreational vehicle (RV)	5.0%	4.1%	9.1%	3.6%	6.0%	4.6%	3.0%	1.4%-	47.0%+	0.5%-	0.4%-
Tour van or bus	2.9%	4.9%	5.8%	0.0%	0.2%-	0.7%	3.7%	0.5%-	0.0%	2.3%	5.8%
Motorcycle	2.0%	0.8%	1.1%	6.4%	1.9%	1.4%	3.1%	2.4%	2.8%	1.5%	1.0%
Walking	1.2%	0.8%	0.0%	1.4%	3.1%+	0.5%	0.0%	10.9%+	1.2%	0.1%-	0.3%
Mammoth Trolley/ Shuttle	0.6%	0.5%	0.6%	0.2%	1.3%	0.7%	0.0%	0.5%	1.0%	0.0%	2.5%+
Public transit	0.3%	0.1%	0.0%	0.9%	0.7%	0.1%	0.0%	1.8%	0.0%	0.2%	0.7%
Bicycle	0.3%	0.3%	0.0%	0.4%	0.3%	0.2%	0.0%	0.3%	0.0%	0.0%	0.7%
Other	1.3%	0.2%	6.1%	0.1%-	2.6%	0.1%	2.9%	0.0%	0.0%	0.1%-	0.1%-
DK/ No response	0.8%	0.3%	0.3%	2.4%	1.1%	0.2%	1.7%	1.0%	0.0%	0.1%	0.0%

\* Adds to more than 100% due to multiple response.

### General Activities While in Mono County

- Visitors participated in an average of 3.5 activities while in Mono County.
- Three-fourths or 77% of them went sightseeing/explored the area while 73% ate in restaurants, 70% participated in outdoor recreation, 44% visited historic sites or natural wonders, and 43% went shopping.
- Campers tended to participate in the most activities with RV campers at 4.5 activities and tent campers at 4.4. Conversely, day visitors participated in the fewest activities, an average of 2.8 activities, which is likely attributable to their limited time in the area.
- Those from Central California also did fewer activities and given their proximity to Mono County can be assumed to be many of the day visitors.

**Table 36a – General Activities Participated in Mono County**

Activities Participated in Mono County	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Sightseeing/ Explore the area	77.0%	80.5%	64.0%-	75.7%	74.4%	82.8%	66.7%-	92.1%+	89.6%+	77.7%	81.0%
Eat in restaurants	72.7%	77.7%+	71.9%	72.1%	69.4%	59.9%-	68.1%	67.3%	78.0%	75.0%	79.1%+
Outdoor recreation	69.7%	86.2%+	59.9%	62.9%	57.8%-	44.6%-	46.3%-	93.0%+	96.0%+	65.6%	85.9%+
Visit historic sites or natural wonders	44.2%	44.5%	34.5%	44.0%	46.7%	49.4%	38.1%	79.3%+	68.9%+	42.0%	40.0%
Shopping	43.3%	51.3%+	29.0%-	39.2%	38.6%	40.8%	27.0%-	46.9%	60.9%+	42.1%	58.8%+
Visit a museum	21.5%	23.5%	20.8%	19.5%	22.1%	16.6%	22.4%	37.5%+	40.9%+	18.8%	11.3%-
Just visit/ socialize	17.6%	24.8%+	14.3%	11.9%-	9.9%-	14.4%	3.3%-	20.5%	18.1%	15.2%	31.8%+
Conduct business or attend a meeting/ conference	3.6%	2.6%	9.3%	2.1%	3.0%	4.9%	5.2%	1.2%	0.8%-	3.0%	1.0%-
Other Area activities	2.4%	2.4%	1.3%	1.4%	4.0%	2.6%	1.0%-	3.5%	0.9%	2.7%	1.5%
None of the above	1.0%	0.4%	0.0%	1.6%	3.0%	0.0%	2.1%	0.0%	0.0%	0.2%-	0.7%
None - just passing through	3.6%	2.0%	4.6%	5.8%	4.3%	4.9%	8.9%+	0.0%	1.7%	1.0%	0.6%-
<b>Avg. Number of Activities</b>	<b>3.52</b>	<b>3.94</b>	<b>3.05</b>	<b>3.29</b>	<b>3.26</b>	<b>3.16</b>	<b>2.78</b>	<b>4.41</b>	<b>4.54</b>	<b>3.42</b>	<b>3.90</b>

**Table 36b – General Activities Participated in Mono County by Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Sightseeing/ Explore the area	77.0%	75.4%	90.2%+	58.8%-	75.3%
Eat in restaurants	72.7%	76.7%	81.5%+	75.0%	51.4%-
Outdoor recreation	69.7%	68.4%	60.2%-	89.9%+	70.3%
Visit historic sites or natural wonders	44.2%	53.8%+	47.4%	11.1%-	46.0%
Shopping	43.3%	42.2%	47.3%	52.8%+	33.1%-
Visit a local museum	21.5%	24.7%	27.7%	5.4%-	19.1%
Just visit/ socialize	17.6%	10.2%-	12.3%-	48.0%+	16.8%
Conduct business or attend a meeting/ conference	3.6%	1.7%-	4.9%	1.0%-	7.2%
Other Area activities	2.4%	2.8%	3.4%	0.9%	1.6%
None of the above	1.0%	0.0%	1.7%	2.9%	0.5%
None - just passing through	3.6%	7.4%	1.4%	0.6%-	1.8%

**Outdoor Activities While in Mono County**

Those 69.7% who indicated engaging in outdoor activities were asked to specify which type. Of course this varied greatly by season.

- Almost one-half or 47% of outdoor visitors went hiking while in Mono County, 39% went fishing, 38% were involved in photography, 25% camped, 16% went downhill skiing, 12% did bird watching, and 11% each went boating/rowing/sailing or went bicycle riding/bike racing.

**Table 37a – Outdoor Activities Participated in Mono County**

Outdoor Activities Participated in Mono County	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base: Does outdoor activities</b>	<b>950</b>	<b>498</b>	<b>98</b>	<b>131</b>	<b>150</b>	<b>73</b>	<b>89</b>	<b>114</b>	<b>84</b>	<b>209</b>	<b>221</b>
Hiking	47.4%	43.9%	40.0%	55.2%	50.2%	62.7%+	42.3%	82.3%+	68.8%+	36.8%-	36.8%-
Fishing	38.7%	46.6%+	39.0%	34.5%	29.3%	7.0%-	26.1%-	59.6%+	75.0%+	22.2%-	30.5%-
Photography	37.7%	34.9%	40.4%	37.4%	42.6%	46.1%	39.4%	43.9%	46.3%	37.3%	27.1%-
Camping	24.7%	22.4%	24.5%	26.7%	38.5%+	8.8%-	13.1%-	77.1%+	79.1%+	8.1%-	8.1%-
Skiing - downhill	16.0%	21.7%+	15.7%	4.9%-	7.0%-	16.1%	2.1%-	0.3%-	0.2%-	24.8%+	37.1%+
Bird watching	11.8%	10.2%	4.7%-	13.7%	21.1%	9.8%	9.4%	21.5%	6.2%-	11.8%	10.7%
Boating/ rowing/ sailing	11.3%	13.7%	18.0%	9.3%	4.8%-	1.6%-	1.8%-	17.4%	26.6%+	11.8%	6.7%-
Bicycle riding/ bike racing	10.6%	10.8%	11.0%	12.0%	6.3%-	14.8%	4.0%-	9.4%	20.2%	7.0%	11.9%
Hot springs	7.8%	5.0%	9.5%	18.5%	8.6%	2.7%	9.0%	13.4%	11.9%	5.5%	6.2%
Snowboarding	5.9%	7.9%+	6.3%	1.0%-	2.9%-	6.7%	0.0%	0.1%-	0.2%-	10.2%+	12.3%+
Rock-climbing	5.0%	3.7%	3.8%	5.0%	9.9%	6.4%	3.8%	8.8%	9.9%	1.8%-	6.5%
Horseback riding/ pack trip	4.8%	4.0%	11.4%	5.6%	2.6%	4.3%	1.9%	3.7%	14.5%	1.0%-	3.9%
Skiing - cross-country/ skating/ telemarking	3.3%	4.4%	4.7%	2.4%	0.2%-	1.5%	0.8%-	0.2%-	0.0%	4.8%	7.1%+
Kayaking	2.9%	3.6%	1.3%	4.3%	1.5%	0.0%	0.0%	11.7%	3.1%	2.9%	0.5%-
Golf	2.9%	1.7%	0.5%-	4.0%	5.6%	6.5%	3.1%	1.7%	0.0%	2.2%	4.6%
Sledding	1.7%	2.5%+	2.4%	0.9%	0.1%-	0.0%	0.0%	0.0%	0.0%	2.8%	3.6%
Snowmobiling	1.5%	1.8%	0.0%	1.1%	2.8%	0.0%	1.7%	0.0%	0.0%	1.0%	2.7%
Rock hounding	1.4%	1.0%	1.9%	2.7%	1.3%	1.6%	0.0%	4.1%	1.3%	1.5%	1.2%
Off-road motor sports	1.2%	1.3%	1.6%	1.8%	0.2%-	0.6%	0.8%	1.5%	2.3%	0.0%	0.9%
Snow-shoeing	0.9%	1.1%	1.4%	1.1%	0.4%	0.0%	0.0%	0.1%-	0.0%	2.4%	1.6%
Scientific exploration	0.9%	0.7%	0.0%	1.4%	1.9%	0.0%	0.0%	4.1%+	0.0%	2.2%	0.0%
Geo-caching	0.2%	0.2%	0.0%	0.6%	0.4%	0.0%	0.0%	0.0%	0.3%	0.3%	0.4%
Ice-climbing	0.2%	0.2%	0.0%	0.2%	0.2%	0.0%	0.0%	0.5%	1.0%	0.0%	0.0%
Other outdoor activity	4.5%	1.8%-	5.6%	13.9%	4.0%	5.3%	10.0%	1.0%-	0.2%-	3.2%	3.1%
DK/ No response	1.6%	0.7%	2.4%	1.4%	3.0%	4.8%	3.0%	0.0%	0.0%	1.6%	1.9%

Differences in activities are evident by season as discussed below and shown in the next table.

- In the summer hiking fishing and camping dominate.
- In the Fall, the main activities are hiking and photography, possibly related to Fall color viewing.
- Winter visitors are overwhelmingly skiing and also but to a lesser extent snowboarding.
- In the Spring, fishing, hiking and photography are the most popular activities.

**Table 37b – Outdoor Activities Participated in Mono County by Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base: Does outdoor activities</b>	<b>950</b>	<b>252</b>	<b>204</b>	<b>275</b>	<b>219</b>
Hiking	47.4%	65.0%+	59.1%+	6.4%-	39.7%
Fishing	38.7%	54.7%+	39.2%	0.0%	44.9%
Photography	37.7%	34.3%	68.5%+	2.5%-	41.2%
Camping	24.7%	46.4%+	13.9%-	0.5%-	20.1%
Skiing: downhill	16.0%	0.0%	0.0%	74.8%+	9.3%-
Bird watching	11.8%	17.2%+	15.9%	0.1%-	8.0%
Boating/rowing/sailing	11.3%	19.2%+	15.9%	0.0%	1.9%-
Bicycle riding/bike racing	10.6%	20.7%+	8.5%	0.3%-	3.9%-
Hot springs	7.8%	15.2%+	8.0%	0.1%-	1.1%-
Snowboarding	5.9%	0.0%	0.0%	29.0%+	1.9%-
Rock-climbing	5.0%	8.1%+	4.8%	0.1%-	4.1%
Horseback riding/ pack trip	4.8%	10.3%+	1.4%-	0.0%	2.9%
Skiing: cross-country/skating/ telemark	3.3%	0.0%	0.0%	11.9%+	5.2%
Kayaking	2.9%	6.1%+	0.3%-	0.0%	3.0%
Golf	2.9%	4.3%	3.0%	0.0%	2.7%
Sledding	1.7%	0.0%	0.0%	7.9%+	1.0%
Snowmobiling	1.5%	0.0%	0.0%	7.6%+	0.4%
Rock hounding	1.4%	2.5%	1.8%	0.0%	0.4%-
Off-road motor sports	1.2%	0.7%	2.4%	0.2%-	1.6%
Snow-shoeing	0.9%	0.0%	0.0%	4.3%+	0.6%
Scientific exploration	0.9%	0.9%	2.3%	0.0%	0.0%
Geo-caching	0.2%	0.4%	0.2%	0.0%	0.2%
Ice-climbing	0.2%	0.3%	0.0%	0.0%	0.2%

### Specific Areas/Venues Visited

In addition to general activities and specific outdoor activities, the specific Mono County venues visitors frequented are discussed and shown in the next table.

- Visitors frequented an average of 2.79 venues while on this trip.
- Close to one-half or 47% visited Mammoth Lakes Town followed by 32% who visited Lee Vining, 26% visited June Lakes area, and 21% visited Mono Lakes area.

- Another 19% went to Mammoth Mountain (bike park, scenic gondola, ski area), 18% to Bodie, 17% to Mammoth Lakes – Lakes Basin ski, 15% to Bridgeport, 12% to Convict Lake, and 10% each to Walker and Twin Lakes.
- Southern Californians, hotel patrons, and visitors renting condos were more likely to visit June Lakes area compared to any other segment while Northern Californians and day visitors were more like to visit Lee Vining.

**Table 38a - Specific Mono County Attractions/Areas Visited**

Specific Venue Visited	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Conr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Mammoth Lakes Town	46.8%	59.0%+	35.0%-	36.6%-	32.4%-	50.4%	20.5%-	62.8%+	61.0%+	51.4%	73.1%+
Lee Vining	31.9%	21.1%-	31.5%	46.1%+	40.2%	39.9%	46.1%+	23.1%-	40.3%	26.9%	12.8%-
June Lake area	25.8%	36.6%+	23.6%	19.2%	15.6%-	12.6%-	8.9%-	18.5%-	34.4%	36.5%+	35.2%+
Mono Lake area	21.2%	19.9%	21.0%	24.1%	17.0%	29.5%	16.3%-	22.9%	39.2%+	30.6%+	16.6%-
Mammoth Mountain (bike park, scenic gondola, ski area)	18.8%	26.2%+	15.5%	10.9%-	13.4%-	13.6%	2.2%-	23.4%	25.6%	23.7%	43.2%+
Bodie	18.0%	17.5%	18.5%	16.4%	18.9%	20.4%	19.2%	25.3%	35.9%	18.2%	7.0%-
Mammoth Lakes - Lakes Basin ski area	17.1%	23.1%+	10.3%-	12.0%	11.4%-	17.1%	3.4%-	15.8%	14.3%	25.0%+	33.4%+
Bridgeport	14.6%	15.7%	10.3%	15.6%	18.8%	6.1%-	16.4%	19.0%	33.3%+	11.0%	6.0%-
Convict Lake	11.8%	16.8%+	10.7%	9.0%	7.5%	4.0%-	3.2%-	18.6%	19.1%	13.7%	16.4%
Walker	10.2%	6.0%-	7.3%	17.7%	18.9%+	4.7%	19.9%+	8.6%	12.9%	2.3%-	1.7%-
Twin Lakes	9.5%	13.1%+	9.9%	8.1%	5.0%-	4.6%	2.6%-	14.9%	22.9%+	10.4%	12.9%
Devil's Postpile/ Red's meadow	9.1%	12.2%+	4.3%-	6.7%	10.1%	4.0%-	1.2%-	24.9%+	17.7%	9.6%	13.3%
Crowley Lake/ McGee Creek	8.7%	11.0%	13.5%	5.5%	8.0%	0.9%-	8.1%	9.6%	15.8%	6.1%	7.5%
Rock Creek/ Tom's Place	8.2%	9.8%	13.9%	6.2%	6.0%	2.8%-	5.8%	16.3%	14.4%	6.7%	9.7%
Topaz (Nevada border)	5.0%	4.7%	8.7%	2.5%	8.5%	0.3%-	7.7%	1.4%-	12.2%	3.4%	0.6%-
Hot Creek/ Old Benton	4.6%	7.4%+	3.0%	3.4%	2.2%-	0.8%-	1.1%-	9.2%	5.8%	5.2%	7.0%
Lundy Lake	2.9%	3.1%	4.3%	2.0%	2.6%	2.9%	1.5%-	4.3%	7.6%	3.7%	1.1%-
Virginia Lake	2.7%	2.4%	8.5%	2.4%	1.5%	0.0%	2.0%	4.8%	10.2%	1.6%	0.3%-
Mammoth - Shady Rest x-c ski snowmobile area	2.2%	3.7%+	0.8%-	0.6%-	1.1%	1.9%	0.3%-	0.0%	0.2%-	0.5%-	7.9%+
Coleville	1.7%	1.3%	0.1%-	2.7%	3.7%	0.0%	0.7%-	4.2%	3.2%	3.2%	0.9%
Smokey Bear Flats sled & snowmobile area	0.9%	0.4%	0.1%	1.5%	2.4%	0.0%	0.2%	0.0%	0.0%	3.0%	0.4%
Sonora Pass	0.5%	0.0%-	0.5%	1.9%+	0.9%	0.0%	0.3%	0.0%	0.2%	0.4%	0.4%
Other	7.2%	4.7%	8.5%	11.7%	8.4%	7.3%	8.2%	14.1%+	2.6%-	4.5%	6.5%
Don't know/ No specific attractions/ areas	17.2%	20.5%+	8.9%-	8.3%-	16.1%	28.3%+	11.0%-	15.8%	7.3%-	22.1%	28.5%+
Average number of venues	2.79	3.16	2.60	2.62	2.50	2.23	1.96	3.42	4.29	2.95	3.14

**Table 38a - Specific Mono County Attractions/Areas Visited By Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Mammoth Lakes Town	46.8%	46.1%	39.8%-	56.9%+	50.3%
Lee Vining	31.9%	30.0%	53.8%+	1.2%-	28.2%
June Lakes area	25.8%	22.6%	29.4%	33.9%+	21.3%
Mono Lake area	21.2%	22.8%	32.0%+	3.5%-	16.6%
Mammoth Mountain (bike park, scenic gondola, ski area)	18.8%	22.1%	2.3%-	51.0%+	11.5%-
Bodie	18.0%	24.7%+	19.8%	0.0%	16.0%
Mammoth Lakes - Lakes Basin ski area	17.1%	17.8%	6.2%-	41.3%+	12.7%
Bridgeport	14.6%	20.2%+	18.4%	0.1%-	9.3%-
Convict Lake	11.8%	11.4%	13.7%	2.5%-	16.5%
Walker	10.2%	22.0%+	4.7%-	0.8%-	2.4%-
Twin Lakes	9.5%	17.2%+	6.5%	1.1%-	5.1%-
Devil's Postpile/ Red's meadow	9.1%	20.6%+	2.5%-	0.3%-	2.8%-
Crowley Lake/ McGee Creek	8.7%	9.1%	10.0%	1.2%-	11.7%
Rock Creek/ Tom's Place	8.2%	11.8%+	3.3%-	0.6%-	13.6%+
Topaz (Nevada border)	5.0%	5.9%	8.0%	0.1%-	3.0%
Hot Creek/ Old Benton	4.6%	6.9%+	4.9%	0.1%-	3.0%
Lundy Lake	2.9%	3.2%	3.9%	0.1%-	3.3%
Virginia Lake	2.7%	3.2%	3.9%	0.8%-	1.4%
Mammoth - Shady Rest x-c ski snowmobile area	2.2%	0.0%	0.0%	11.2%+	2.7%
Coleville	1.7%	1.1%	1.4%	1.2%	3.7%
Smokey Bear Flats sled & snowmobile area	0.9%	0.0%	0.0%	1.6%	3.3%
Sonora Pass	0.5%	0.0%	0.0%	1.0%	1.9%+
Other	7.2%	4.6%	9.4%	2.6%-	12.5%
Don't know/ No specific attractions/ areas	17.2%	4.1%-	1.0%-	44.5%+	44.3%+

**Lodging Reservations – Method and Advance Reservation Period**

The method by which visitors reserved their lodging in Mono County is discussed below and shown in the next table.

- Approximately one-fourth each or 26% used the lodging's Internet web site and 24% each either did not make an advance reservation or called the property or chain directly to make their reservation in Mono County.
- Northern Californians tended to call the property or chain directly at 33% while International visitors were more likely to use a travel agent at 21%.
- Visitors staying in a tent campground primarily did not make an advance reservation at 60% while hotel patrons were more likely to call the property or chain directly at 29% or use a travel agent at 9% compared to other segments.
- Overnight visitors who rented a condominium were more likely to use a area friend or relative to make their reservation at 23%.

**Table 39 - Method of Reserving Mono County Lodging**

Room Reservation Method	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base: Stay in Mono overnight</b>	<b>875</b>	<b>448</b>	<b>82</b>	<b>122</b>	<b>133</b>	<b>90</b>	*	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
On the lodging Internet site	26.4%	28.2%	28.2%	22.6%	24.9%	21.8%	*	21.4%	36.6%	24.2%	30.2%
Didn't make a reservation	24.0%	22.2%	17.6%	22.6%	33.0%	30.1%	*	59.8%+	31.9%	19.4%	12.5%-
Direct call to the property or chain	23.6%	27.7%+	25.2%	33.1%+	13.1%-	1.9%-	*	6.3%-	20.0%	29.4%+	17.8%-
area friend or relative reserved	11.8%	11.9%	17.2%	8.3%	15.5%	6.9%	*	0.5%-	2.0%-	9.1%	22.7%+
Through a travel agent	3.6%	1.8%-	0.6%-	0.7%-	0.6%-	21.4%+	*	0.0%	0.0%	9.4%+	3.1%
Through my/ our tour arranger or operator	2.3%	2.1%	0.0%	4.4%	1.7%	3.5%	*	1.4%	0.0%	3.0%	2.4%
Area or resort reservation bureau	2.2%	1.9%	2.0%	3.1%	1.0%	3.6%	*	0.7%-	1.7%	2.9%	2.6%
My company booked it	1.9%	1.8%	2.3%	2.2%	2.3%	1.5%	*	0.0%	0.0%	1.9%	3.2%
On a travel Internet site like hotels.com, Travelocity etc.	0.6%	0.3%	0.0%	2.2%	0.6%	1.1%	*	0.0%	0.0%	0.8%	1.0%
Other	5.8%	3.9%-	8.2%	6.0%	9.0%	10.2%	*	11.0%	6.4%	5.3%	5.4%
DK/ No response	0.5%	0.9%	0.0%	0.0%	0.0%	0.0%	*	0.0%	4.0%	0.0%	0.0%



Overnight visitors who made their reservation in advance indicated how far in advance of taking this trip they made their Mono County lodging reservation.

- Overall, 94% of overnight visitors made advance reservations; conversely, 6% did not plan ahead.
- Those who made advance reservations did so about 7.5 weeks before the trip. Those staying in campgrounds tended to make their reservations the farthest in advance with RV campground visitors at 13.4 weeks and tent campground visitors at 11.0 weeks. Hotel guests did so the fewest weeks in advance at 4.2 weeks.
- Somewhat expected, International visitors did so the farthest out at 9.3 weeks compared to visitors from other areas. Interestingly, other U.S. visitors made their reservations 6.6 weeks in advance whereas Southern Californians did so 8.0 weeks in advance.

**Table 40 - Advance Period for Hotel Reservation**

Advance Reservation Period	Total	Residence					MONO Co. Lodging Type			
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base: Made a reservation</b>	<b>655</b>	<b>357</b>	<b>64</b>	<b>88</b>	<b>83</b>	<b>63</b>	<b>45</b>	<b>55</b>	<b>232</b>	<b>230</b>
0 (Did not plan ahead/ decided or reserved here)	5.9%	5.3%	8.3%	10.9%	5.1%	1.7%-	6.7%	3.5%	7.4%	4.1%
1 week	9.3%	9.7%	9.3%	12.3%	9.2%	4.0%	4.8%	3.3%-	17.8%+	5.4%-
2 weeks	9.6%	11.1%	7.8%	8.4%	8.1%	5.8%	4.7%	5.8%	8.8%	12.2%
3-4 weeks	19.3%	16.8%	29.7%	18.1%	23.6%	20.4%	13.7%	16.5%	23.8%	18.9%
5-8 weeks	11.8%	11.1%	7.0%	14.6%	12.3%	16.9%	13.0%	8.5%	8.1%-	18.7%+
9-12 weeks	9.9%	11.4%	4.0%-	7.4%	10.2%	10.3%	17.0%	8.0%	11.4%	8.9%
More than 12 weeks	34.1%	34.6%	34.0%	28.3%	31.4%	40.9%	40.1%	54.4%+	22.7%-	31.9%
<b>Median (Excluding none):</b>	<b>7.48</b>	<b>8.03</b>	<b>4.44</b>	<b>6.07</b>	<b>6.62</b>	<b>9.30</b>	<b>10.95</b>	<b>13.35+</b>	<b>4.16-</b>	<b>6.96</b>

**Number of Nights Away – Mono County and Other Destinations on this Trip**

Overnight visitor groups reported the number of nights they stayed in Mono County as well as in all other locations or destinations on this trip.

- Two-thirds or 64% of visitors stayed overnight in Mono County.
- Overnight visitors stayed an average of 5.2 nights away from home on this trip and they stayed an average of 5.1 nights in other locations/destinations and an average of 3.8 nights in Mono County.
- As expected, International visitors stayed the longest at 17.5 nights away from home and 13.7 nights in other locations/destinations followed by other U.S. residents who stayed an average of 7.0 nights away from home.
- Overnight visitors staying the most nights in Mono County were those staying in RV campgrounds at 5.5 nights and visitors who rented condos at 4.1 nights.
- Visitors stayed the longest in Summer, an average of 4.5 nights, close to 4 nights in Winter and Spring, and 3.3 nights in Fall.

**Table 41a – Nights\* in Mono County**

Average Number of Nights (excluding none)	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Minimum Base:</b>	<b>523</b>	<b>142</b>	<b>38</b>	<b>89</b>	<b>144</b>	<b>101</b>	<b>126</b>	<b>68</b>	<b>44</b>	<b>152</b>	<b>62</b>
Total**	5.24	4.51-	4.44-	4.71	6.96+	17.49+	6.42	6.25+	8.80+	4.70-	4.83
Nights in all other locations/destinations on this trip	5.10	3.27-	2.97-	3.59-	5.12	13.67+	6.42+	5.00	5.07	5.58	5.63
Nights in Mono County	3.82	3.90	4.07	3.24-	3.55	3.85	*	4.15	5.52+	2.80-	4.11+

\* Tables in the section refer to visitor "nights" when discussing length of stay by accommodation for the profile. The terms "days" is used to discuss aggregated visitor length of stay for the economic impact.

\*\* The total of 5.24 is not a sum of nights in other areas and nights in Mono. Each has a different base (some people stayed only in other locations, some only in Mono County and others in both) so the total is based on combined sample size whereas the parts are based on their respective sample sizes.

**Table 41b – Nights in Mono County by Season**

Mean (excluding none)	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Minimum Base:</b>	<b>523</b>	<b>134</b>	<b>155</b>	<b>48</b>	<b>186</b>
Total	5.24	6.15+	4.93	3.93-	6.68+
Nights in all other locations/destinations on this trip	5.10	4.93	5.88	4.31	4.71
Nights in Mono County	3.82	4.51+	3.30-	3.76	3.80

- Overnight visitors staying in an RV park/campground stayed an average of 5.6 nights in Mono County while those in a tent campground stayed 4.4 nights.
- Visitors who stayed in a private home/condo of friends or family without paying did so for 4.3 nights and those renting a condo stayed 4.2 nights.

**Table 41b – Average Nights in Specific Lodging Type in Mono County**

Average Number of Nights by Lodging Type (Excluding none)	Total	Residence				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.
Other form of PAID lodging	6.65	6.36	*	*	*	*
RV park/campground	5.55	7.10	5.74	7.24	4.08	*
Other form of UNPAID lodging	5.14	4.97	*	7.79	4.00	*
Campground - tent	4.44	4.97	4.38	3.53	2.64-	6.42
Private home (unpaid)	4.26	4.33	3.55	3.65	3.78	25.28+
Rental Condo	4.20	3.99	4.57	3.26-	6.05	5.61
Cabin rental	3.80	3.56	4.12	4.16	4.57	*
Hotel or motel or inn	2.78	2.83	2.81	2.61	2.18	2.55

### Lodging Type

- Of the 64% of Mono County overnight visitors, 28% each stayed in a Mono County hotel or rental condo, while 12% each camped in a tent or an RV park/campground.
- By season, more Summer visitors 46% in total were in campgrounds, 27% of Fall visitors rented cabins, 55% of Winter visitors rented condos and in the Spring 30% stayed in hotels and 27% rented condos.
  - Far more International visitors, 61% stayed in a Mono County hotel than any other group by residency.

**Table 42 - Lodging - Overnight Mono County Visitors**

Lodging	Total	Residence					Season			
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base: Stay in Mono overnight</b>	<b>1032</b>	<b>536</b>	<b>92</b>	<b>138</b>	<b>165</b>	<b>101</b>	<b>273</b>	<b>211</b>	<b>290</b>	<b>258</b>
Hotel or motel or inn	28.1%	21.6%-	22.1%	35.6%	26.6%	60.6%+	24.5%	35.3%	28.1%	27.6%
Rental Condo	27.7%	33.0%+	18.6%	14.5%-	24.1%	26.1%	17.0%-	16.4%-	54.8%+	30.0%
Campground - tent	12.4%	12.2%	8.6%	17.0%	19.4%+	3.1%-	23.8%+	5.3%-	0.0%	11.2%
RV park/ campground	11.5%	12.9%	22.6%	7.4%	6.3%-	5.1%	22.2%+	6.3%-	0.1%-	9.0%
Cabin rental	10.0%	9.4%	20.9%	16.1%	6.8%	0.5%-	4.9%-	26.6%+	5.4%	8.2%
Private home/unpaid	9.2%	11.9%+	5.8%	5.7%	9.3%	2.0%-	6.6%-	10.2%	11.0%	11.2%
Other UNPAID lodging	3.1%	1.7%-	1.4%	2.2%	12.5%+	2.2%	6.3%+	0.4%-	0.5%-	2.7%
Other PAID lodging	1.2%	0.9%	0.0%	3.6%	1.4%	0.6%	0.6%	1.0%	1.2%	2.2%

**Satisfaction with Mono County as a Destination – Rating and Reasons**

- Overall, a very strong 95% of visitors were extremely or very satisfied with Mono County as a destination. The overall mean rating of 4.7 (on a scale of 1 -5, with 5 as most satisfied), was “extremely satisfied”.

**Table 43 - Satisfaction with Mono County**

	Total	Interview wave				Residence			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	So. Cal.	Nor. Cal.	U.S.	Int'l.
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>567</b>	<b>174</b>	<b>226</b>	<b>122</b>
Extremely satisfied	58.0%	57.5%	51.0%-	58.3%	68.5%+	62.7%	51.0%	55.2%	52.8%
Very satisfied	37.3%	39.8%	40.4%	36.1%	29.1%-	35.6%	46.0%	32.8%	38.5%
Somewhat satisfied	4.1%	2.6%	7.4%+	4.1%	2.3%	1.6%-	2.8%	9.5%	8.7%
Somewhat unsatisfied	0.3%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%
Don't know	0.2%	0.1%	0.0%	1.4%+	0.0%	0.0%	0.2%	0.6%	0.0%
<b>Mean (excl. DK)</b>	<b>4.66</b>	<b>4.70</b>	<b>4.56</b>	<b>4.60</b>	<b>4.87+</b>	<b>4.74</b>	<b>4.66</b>	<b>4.68</b>	<b>4.59</b>

- The majority or 84% were satisfied due to the scenic beauty, while 49% indicated the activity available they want to do, and 45% just like the area/had been there many times.
- Also frequently mentioned by satisfied visitors included the many things to see and do by 24%, and the relaxing area and activities/good getaway area, friendly people, and the family-friendly environment by 23% each.

**Table 44 – Reasons Satisfied with Mono County**

	Total	Interview wave				Residence			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	So. Cal.	Nor. Cal.	U.S.	Int'l.
<b>Base: Is satisfied</b>	<b>1207</b>	<b>312</b>	<b>299</b>	<b>296</b>	<b>300</b>	<b>567</b>	<b>173</b>	<b>222</b>	<b>122</b>
Scenic beauty/ beautiful area	83.8%	70.9%-	97.4%+	86.1%	88.3%	81.6%	83.4%	86.0%	97.0%+
Has the activities I/we want	49.1%	39.2%-	59.0%+	54.5%	50.6%	55.0%+	53.3%	34.9%-	32.4%-
Like/love the area/been here many times	45.3%	49.5%	50.0%	47.5%	29.4%-	52.3%+	53.7%	36.9%	4.7%-
Many things to see and do	23.7%	13.3%-	34.1%+	40.0%+	17.5%-	28.7%+	17.8%	19.4%	17.0%
Relaxing area & activities/ good get-way area	23.3%	16.6%-	22.6%	36.1%+	27.8%	31.6%+	15.2%-	12.4%-	22.0%
Friendly people	22.8%	15.8%-	19.0%	26.1%	38.8%+	23.5%	17.8%	28.2%	26.9%
Good for families/ family friendly	22.5%	21.1%	17.8%	29.3%+	26.8%	29.2%+	12.6%-	22.4%	15.3%
Uncongested	16.5%	13.8%	19.7%	19.2%	15.3%	20.9%+	10.8%-	15.6%	12.2%
Clean air/ good environment	16.0%	12.3%	14.6%	14.1%	26.2%+	19.9%+	10.5%-	15.1%	13.8%
Like my lodging accommodation	12.6%	9.6%	5.8%-	16.1%	24.7%+	15.8%+	14.0%	10.2%	7.6%
Cleanliness	11.8%	13.0%	6.5%-	10.5%	17.8%+	15.5%	4.8%-	15.2%	9.4%
Nice customer service	9.5%	4.2%-	5.4%-	13.4%	22.3%+	10.1%	10.3%	10.0%	10.7%
Good value	5.2%	3.3%	3.1%	4.2%	12.2%+	6.1%	3.4%	5.0%	3.5%
Other	0.9%	0.6%	0.1%	1.9%	1.9%	0.7%	1.6%	1.6%	0.7%
DK/ No response	0.1%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%

## VISITOR DEMOGRAPHICS

### Overall Visitor Origin

Mono County domestic visitors come primarily from California and internationally from Europe. The following narrative and series of tables discuss visitor origin.

- Overall, 89% of Mono County visitors were from the United States, with 11% from International areas.
  - Of the total, 71% were from California.
  - Most visitors staying in either tent or RV campgrounds were from the U.S. at 97% and 95%, respectively, while more hotels/motels had the highest share of International visitors, 23%, compared to other types of lodging.
- Far more Spring visitors, 18% were International, and 20% were from other U.S. states.

**Table 45 - Overall Visitor Origin**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
California	71.3%	73.1%	71.2%	82.7%	61.6%	58.9%	75.1%	89.8%	69.6%	79.7%
Other U.S.	17.9%	18.0%	18.8%	9.9%	20.4%	29.7%	22.2%	5.5%	7.6%	10.4%
<b>Total U.S.</b>	<b>89.2%</b>	<b>91.1%</b>	<b>90.0%</b>	<b>92.6%</b>	<b>82.0%</b>	<b>88.6%</b>	<b>0.973</b>	<b>95.3%</b>	<b>77.2%</b>	<b>90.1%</b>
International	10.8%	8.9%	10.0%	7.4%	18.0%+	11.4%	2.7%-	4.7%	22.8%+	9.9%

### U.S. Domestic Visitors

#### Top Markets – Domestic

- Of all U.S. market areas, the top 5 U.S. feeder markets accounted for 91% of visitation, listed in order below.
- Mono County' top U.S. feeders were California with 79% of U.S. visitation and Nevada with 7%. Note that as 82% of California visitation is by Californians.<sup>8</sup> Mono County attracts a much narrower geographic market compared to the state.
- Next were Oregon and Colorado at 2% each and Florida at 1% of U.S. visitors.
- More Day visitors, 14% were likely to come from Nevada compared to overnight visitors.
- Visitors staying in RV parks/campgrounds and those renting condos were more likely to be Californians at 93% and 88%, respectively.

<sup>8</sup> California Travel & Tourism Commission, 2007

**Table 46 - Top U.S. Visitor Origin Areas**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base: US resident</b>	<b>1092</b>	<b>292</b>	<b>275</b>	<b>277</b>	<b>248</b>	<b>161</b>	<b>121</b>	<b>88</b>	<b>242</b>	<b>229</b>
California	79.3%	78.6%	77.7%	0.896	74.5%	0.666	80.1%	0.929	84.8%	0.881
Nevada	7.2%	10.4%+	7.2%	2.8%-	4.2%-	14.3%+	5.3%	1.9%-	3.0%-	1.3%-
Oregon	1.8%	1.7%	2.1%	1.5%	2.1%	3.7%	0.6%-	0.1%-	0.5%-	2.0%
Colorado	1.5%	1.5%	1.5%	0.9%	1.8%	2.4%	0.6%	0.0%	0.6%	2.1%
Florida	0.9%	1.7%	0.5%	0.1%	0.6%	2.3%	0.2%	0.0%	0.7%	0.0%
Ohio	0.7%	0.2%	1.6%	1.0%	0.0%	1.6%+	0.9%	0.0%	0.0%	0.0%

\* Percentages based on U.S. residents, not entire sample. In order by "total"

**Top Markets – International**

- Close to two-thirds or 64% of International visitors were from Europe (excluding Scandinavia) and 14% from Scandinavia.
- Another 9% were from Asia/Pacific Islands followed by 6% from Australia/New Zealand, 4% from Canada, and 3% from the Middle East.

**Table 47 - International Feeder Markets by Region**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base: US visitors</b>	<b>122</b>	<b>22</b>	<b>25</b>	<b>23</b>	<b>52</b>	<b>21</b>	<b>8</b>	<b>3</b>	<b>53</b>	<b>24</b>
Europe (other than Scandinavia)	63.8%	72.5%	63.0%	58.4%	57.9%	67.2%	47.1%	100.0%	68.9%	44.9%
Scandinavia (Denmark, Finland, Iceland, Norway, Sweden)	13.9%	18.2%	18.0%	0.0%	11.0%	23.5%	15.9%	0.0%	11.9%	2.0%
Asia/ Pacific Islands	8.9%	3.4%	0.0%	11.4%	19.9%+	2.8%-	29.1%	0.0%	8.7%	19.0%
Australia/ New Zealand	5.6%	0.0%	10.8%	22.2%+	2.0%	6.5%	0.0%	0.0%	1.5%	13.1%
Canada	3.7%	5.9%	1.2%	5.5%	3.0%	0.0%	7.9%	0.0%	4.8%	6.4%
Middle East	2.6%	0.0%	6.9%	0.0%	2.4%	0.0%	0.0%	0.0%	0.8%	13.8%
Mexico	0.5%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	1.3%	0.0%
South America	0.1%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Central America	0.1%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Other (not listed above)	0.8%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	2.0%	0.0%

**Type of Travel Group on this Trip**

Visitors travel type group is discussed below and shown in the next table.

- More visitors reported traveling in a family group, 37%, another 27% traveled as a couple, 16% traveled as a group of friends or co-workers, and 11% were traveling alone.
- Not surprisingly, more Summer visitors were in family groups, 52% and to some extent in Winter, 43% while in Fall more, 39% were a couple and Spring travel groups were evenly divided between families, couples and mixed groups.

**Table 48 - Type of Travel Group**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
A family group	37.1%	52.4%+	24.8%-	43.0%+	23.8%-	34.5%	35.7%	43.3%	35.3%	47.4%+
A couple	27.4%	20.5%-	38.7%+	24.3%	25.2%	31.1%	16.6%-	28.5%	32.1%	16.7%-
A group of friends or co-workers	16.3%	11.6%-	22.5%+	17.9%	14.5%	11.9%-	24.1%	13.0%	17.0%	22.2%+
Alone	10.9%	9.2%	11.7%	9.7%	13.4%	15.8%+	7.7%	3.4%-	8.4%	2.7%-
A mixed group of family and friends	7.5%	5.2%	0.8%-	5.2%	23.1%+	5.3%	15.3%	11.8%	5.9%	11.0%
Other	0.9%	1.2%	1.5%	0.0%	0.0%	1.3%	0.7%	0.0%	1.3%	0.0%

- Approximately 7% of all visitors were in an organized tour group.
- Many more in Fall, nearly 12% were in a tour group.

**Table 49 - Travel in a Tour Group**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
No	93.1%	96.7%+	88.5%-	92.8%	93.9%	93.0%	90.2%	97.4%+	93.6%	91.4%
Yes	6.9%	3.3%-	11.5%+	7.2%	6.1%	7.0%	9.8%	2.6%-	6.4%	8.6%



**Average Group Size**

- The overall average Mono County visitor group size was 3.8 persons, which varied little between groups except for visitors staying in condos with 4.7 persons or Southern Californians with 4.3 people, as more of them traveled in family groups or with groups of friends or co-workers.

**Table 50 - Average Number of Persons Per Visitor Group**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
. Traveling Alone	11.9%	11.7%	11.7%	9.7%	14.4%	17.1%+	8.4%	3.4%-	10.4%	2.7%-
. With others	88.0%	88.3%	88.3%	90.0%	85.6%	82.9%-	91.6%	96.6%+	89.6%	97.0%+
. With 1 other	2.4%	4.7%+	0.8%-	1.5%	1.2%	0.9%-	6.9%	0.0%	4.1%	2.3%
. With 2 others	37.7%	29.7%-	49.5%+	35.4%	36.1%	45.8%+	32.7%	36.6%	37.7%	21.4%-
. With 3+ others	47.8%	53.8%+	38.0%-	52.8%	48.3%	36.2%-	51.2%	60.0%+	47.6%	73.2%+
. With someone under 18	29.2%	44.9%+	12.8%-	41.9%+	16.6%-	22.7%-	26.2%	44.1%+	30.1%	44.0%+
. With 1 child	11.9%	18.1%+	5.5%-	15.3%	8.1%	14.8%	4.2%-	8.1%	12.6%	10.5%
. With 2 children	10.4%	16.5%+	4.2%-	16.2%+	4.7%-	5.2%-	11.5%	15.9%	13.1%	18.8%+
. With 3+ children	6.8%	10.2%+	3.1%-	10.5%	3.8%-	2.7%-	10.5%	20.1%+	4.4%	14.7%+
<b>Mean group size: (20% trimmed)</b>	<b>3.79</b>	<b>3.98</b>	<b>3.47-</b>	<b>3.94</b>	<b>3.81</b>	<b>3.27-</b>	<b>3.76</b>	<b>4.18</b>	<b>3.60</b>	<b>4.69+</b>

- Of all Mono County visitor groups, 19% included at least one person aged younger than 18.
  - More RV parks/campground visitors, 33% were traveling with minors at followed by guests in rental residences at 29% and Southern Californians at 27%.
- Again, as expected, more in Summer, 28% were traveling with someone under 18, while this was also strong in Winter, also at 28%.

**Table 51 - Traveling With Someone Under 18 Years Old**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
<b>Mean #:</b>										
Under age 18	0.56	0.89+	0.21-	0.79+	0.36-	0.28-	0.60	1.12+	0.46	1.02+
18 or over	2.26	2.18	2.23	2.08-	2.53+	2.01-	2.23	2.36	2.12	2.56+
<b>Share:</b>										
Under age 18	19.2%	27.7%+	8.6%-	27.9%+	12.3%-	12.6%-	21.1%	32.5%+	17.9%	28.5%+
18 or over	80.8%	72.3%-	91.4%+	72.1%-	87.7%+	87.4%+	78.9%	67.5%-	82.1%	71.5%-

- Close to two-thirds, or 64% had no children living at home, while 22% had 12 to 18 year olds at home and 16% had 6 to 11 year olds at home.

**Table 52 – Presence of Children at Home by Age Group**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
No children at home	63.7%	49.5%-	79.4%+	47.8%-	81.0%+	72.7%+	59.1%	50.0%	59.0%	54.9%-
Infant-5 years old	8.6%	12.1%	5.3%	9.9%	5.4%	3.4%-	9.5%	16.5%	11.6%	9.7%
6 - 11 years old	15.7%	21.0%+	9.5%-	25.4%+	6.7%-	10.3%-	16.7%	27.9%	12.7%	25.6%+
12 - 18 years old	21.6%	32.0%+	9.0%-	36.3%+	8.1%-	15.1%-	22.8%	33.0%	24.3%	28.9%+
Refused	0.6%	1.3%	0.4%	0.0%	0.0%	1.2%	1.8%	0.0%	0.2%	0.0%

**Visitor Age**

- Overall, Mono County visitors (respondent) averaged 48 years of age.
- Corresponding to the above, Fall visitors who are most likely not to have children at home are the oldest, at 52 years.

**Table 54 - Age of Visitor Group Respondent**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
18-29	9.6%	8.8%	9.6%	9.6%	10.9%	8.8%	12.1%	4.6%-	9.8%	8.3%
30-39	16.8%	17.5%	14.7%	15.1%	19.6%	17.3%	19.5%	24.2%	19.8%	11.2%-
40-49	26.8%	33.9%+	16.9%-	40.4%+	16.8%-	23.9%	25.4%	27.9%	27.7%	34.8%+
50-59	26.5%	23.5%	32.7%+	21.1%	27.5%	27.7%	24.6%	20.7%	26.5%	28.6%
60+	20.1%	16.2%	26.0%+	13.8%-	24.0%	22.3%	17.2%	22.1%	15.6%	16.7%
Refused	0.3%	0.1%	0.1%	0.0%	1.2%	0.0%	1.2%	0.5%	0.7%	0.3%
<b>Median:</b>	<b>48.27</b>	<b>46.47-</b>	<b>52.18+</b>	<b>45.77-</b>	<b>50.26</b>	<b>49.51</b>	<b>46.52</b>	<b>47.03</b>	<b>46.76</b>	<b>48.20</b>

**Household Composition**

- Close to seven in ten or 69% of Mono County visitors were married while 26% were single or unmarried.

**Table 53 – Household Composition**

	Total	Interview wave				MONO Co. Lodging Type				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Married	68.5%	78.2%+	66.9%	67.6%	52.9%-	67.7%	62.1%	79.5%+	65.7%	70.5%
Single/ unmarried	26.0%	19.7%-	31.0%	31.4%	27.2%	28.1%	31.7%	17.5%	25.2%	23.0%
Group of unrelated individuals	3.2%	1.7%	1.5%	1.0%-	10.2%+	3.3%	1.5%	0.0%	5.4%	4.4%
Extended family group	2.1%	0.2%-	0.1%-	0.0%	9.6%+	0.9%	4.1%	3.0%	3.2%	2.2%
Other	0.2%	0.1%	0.5%	0.0%	0.2%	0.0%	0.5%	0.0%	0.5%	0.0%

### Annual Household Income

- Overall, Mono County visitors' median annual household income was \$92,600, well above that for the U.S. as a whole and for the travel market. <sup>9</sup>
- At the high end, Mono County visitors staying in rental residences' median income was \$122,200 and visitors from Southern California had a median income of \$100,400.

**Table 55a- Median Annual Household Income per Visitor Group**

Income Group	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Under \$30,000	6.3%	5.0%	4.1%	7.0%	11.8%	3.0%	7.5%	9.1%	4.8%	4.4%	5.3%
\$30,000-\$49,999	10.1%	6.8%-	10.2%	9.4%	17.3%	11.7%	14.6%+	6.7%	5.9%	10.1%	3.7%-
\$50,000-\$74,999	11.8%	10.2%	19.4%	6.9%	12.9%	15.3%	11.6%	11.2%	13.9%	9.3%	15.0%
\$75,000-\$99,999	17.8%	18.3%	22.8%	18.0%	15.6%	14.1%	19.6%	28.7%+	26.3%	17.3%	10.1%-
\$100,000-199,999	26.3%	28.4%	23.8%	39.2%+	19.7%	12.7%-	23.4%	17.7%-	24.3%	28.1%	31.8%
\$200,000-500,000	7.6%	9.9%	3.8%	5.7%	7.0%	6.5%	5.8%	1.0%-	7.3%	9.2%	13.7%+
Over \$500,000	1.5%	2.3%	0.3%-	2.0%	0.4%-	1.0%	0.0%	3.9%	0.0%	0.1%-	2.7%
Refused	18.6%	19.0%	15.5%	11.9%-	15.3%	35.6%+	17.6%	21.7%	17.4%	21.4%	17.7%
<b>Median</b>	<b>\$92,600</b>	<b>\$100,400</b>	<b>\$84,300</b>	<b>\$107,300</b>	<b>\$75,700</b>	<b>\$78,700-</b>	<b>\$84,700-</b>	<b>\$85,500</b>	<b>\$90,800</b>	<b>\$97,300</b>	<b>\$122,300+</b>

<sup>9</sup> The mean household income for all U.S. households was \$66,600 in 2006 according to the U.S. Census. The mean household income for U.S. traveling households was \$68,800 in 2006 according to the Travel Industry Association of America, Domestic Travel Report for 2007.

**Table 55b- Median Annual Household Income per Visitor Group by Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Under \$30,000	6.3%	7.3%	6.1%	6.0%	4.8%
\$30,000 - \$49,999	10.1%	13.2%	11.2%	4.6%-	6.7%
\$50,000 - \$74,999	11.8%	10.3%	12.0%	12.2%	13.8%
\$75,000 - \$99,999	17.8%	17.5%	24.2%+	12.3%-	13.8%
\$100,000 - \$199,999	26.3%	26.3%	23.4%	36.4%+	22.8%
\$200,000 - \$500,000	7.6%	7.3%	5.4%	13.9%+	6.6%
Over \$500,000	1.5%	2.5%	0.3%-	2.8%	0.4%-
Refused	18.6%	15.6%	17.3%	11.7%-	31.0%+
<b>Median (*1,000 \$US):</b>	<b>\$92,600</b>	<b>\$91,400</b>	<b>\$87,400</b>	<b>\$124,700+</b>	<b>\$91,500</b>

**Respondent Gender**

- Overall, 55% of the visitor (respondents) were male and 45% female.
- In winter there were more females, 52% versus 48% males.

**Table 56a- Respondent Gender**

Respondent Gender	Total	Residence					MONO Co. Lodging Type				
		So. Cal.	Cntr. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/ Motel	Rent. Condo
<b>Base:</b>	<b>1214</b>	<b>567</b>	<b>125</b>	<b>174</b>	<b>226</b>	<b>122</b>	<b>182</b>	<b>129</b>	<b>91</b>	<b>295</b>	<b>253</b>
Male	54.8%	50.5%	57.4%	53.6%	56.9%	66.9%+	60.0%	59.9%	45.1%	54.8%	50.4%
Female	45.2%	49.5%	42.6%	46.4%	43.1%	33.1%-	40.0%	40.1%	54.9%	45.2%	49.6%

**Table 56a- Respondent Gender by Season**

	Total	Interview wave			
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008
<b>Base:</b>	<b>1214</b>	<b>314</b>	<b>300</b>	<b>300</b>	<b>300</b>
Male	54.8%	52.8%	58.1%	48.0%	58.8%
Female	45.2%	47.2%	41.9%	52.0%	41.2%

## **Visitor Profiles**

The following tables summarize Mono County' visitor market segments to provide a greater understanding of subgroup visitor dynamics. This information offers a basis for marketing plans and programs, and for discussions and actions as to how to meet the needs of these various groups. Narrative and a table for each segment are presented in Appendix 1.

Note that the percentage of total visitation represented by each segment is shown in the first row of each table. This figure is derived from the on-site survey, which quantifies visitor groups rather than individual visitors. As these data are applied to the economic model to develop the visitor volume estimates, these percentages may differ the economic impact analysis. Again, the numbers in parentheses reflect 2004 study results, shown for comparison where applicable and available.

Mono County Economic Development Department  
Economic and Fiscal Impacts and Visitor Profile of Mono County Tourism for FY 2008

**Table 57a - Key Characteristics of Mono County Visitors by Segment**

Characteristic	All Mono County Visitors	Season				Residence				Mono County Lodging				
		Summ. 2007	Fall 2007	Winter 2008	Spring 2008	So. Cal.	Nor. Cal.	U.S.	Int'l.	Day Vis.	Camp - tent	Camp - RV	Hotel/Motel	Rental Condo
% of Total Visitors in Segment <sup>1</sup>	100.0%	25.9%	24.7%	24.7%	24.7%	46.7%	14.3%	18.6%	10.0%	15.0%	10.6%	7.5%	24.3%	20.8%
% Californians (of total visitors)	70.7%	71.6%	69.9%	83.0%	61.1%	100.0%	100.0%	0.0%	0.0%	59.0%	77.9%	88.5%	65.5%	79.4%
% International Resident	10.8%	8.9%	10.0%	7.4%	18.0% +	0.0%	0.0%	0.0%	100.0%	11.4%	2.7%-	4.7%	22.8%+	9.9%
% Have Visited in past 3 Years	64.1%	60.6%	61.0%	79.4%+	63.9%	76.4%+	65.2%	52.1%-	14.7%-	57.9%	70.8%	65.8%	58.3%	69.6%
Avg. # Visits to MC in Past 3 Years (by those who visited)	5.17	3.93-	5.75	5.27	5.78	4.87	4.05	4.89	2.42-	9.45+	4.09	3.42-	3.31-	5.17
% Mono County Day Visitors	35.6%	37.1%	53.8%+	7.7%-	28.3%	16.0%-	52.4%+	57.0%+	37.2%	100.0%	0.0%	0.0%	0.0%	0.0%
Avg. Nights Stay in MC (all visitors)	2.49	2.92+	1.47-	3.44+	2.76	3.33+	1.52-	1.53-	2.43	*	4.15+	5.52+	2.80+	4.11+
Avg. Nights Stay in MC (overnighters) <sup>2</sup>	3.82	4.51+	3.30-	3.76	3.80	3.90	3.24-	3.55	3.85	*	4.15	5.52+	2.80-	4.11+
% Used Lodging's Internet web-site to reserve Mono lodging <sup>3</sup>	26.4%	31.8%	19.4%-	34.3%+	15.7%-	28.2%	22.6%	24.9%	21.8%	*	21.4%	36.6%	24.2%	30.2%
Avg. Number of Weeks in Advance reserved lodging	7.48	10.17+	4.29-	6.53	7.28	8.03	6.07	6.62	9.30	*	10.95	13.35+	4.16-	6.96
% Mono County is Main Destination	65.4%	61.8%	56.0%-	94.2%+	64.2%	83.0%+	58.5%	47.2%-	24.5%-	36.2%-	82.2%+	77.4%+	68.8%	90.0%+
Satisfaction Rating (5= highest – 1 = lowest)	4.66	4.70	4.56	4.60	4.87+	4.74	4.66	4.68	4.59	4.42-	4.83+	4.88+	4.68	4.70
Average # Persons in travel group	3.79	3.98	3.47-	3.94	3.81	4.25+	3.58	3.31-	3.70	3.27-	3.76	4.18	3.60	4.69+
Median Respondent Age (years)	48.27	46.47-	52.18+	45.77-	50.26	47.15	48.67	52.15+	44.57-	49.51	46.52	47.03	46.76	48.20
Median Annual Household Income	\$92,600	\$91,400	\$87,400	\$124,700 +	\$91,500	\$100,400	\$107,300	\$75,600	\$78,700 -	\$84,600 -	\$85,500	\$90,800	\$97,300	\$122,200 +

\* Not applicable for that category

<sup>1</sup> Average as reported from the survey and may differ from those used in the economic impact.

<sup>3</sup> Percentage of all overnight visitors in that segment.

Note, Data are generally read down each column not across rows.

**Table 57b - Key Characteristics of Mono County Visitors by Segment**

Characteristic	All Mono County Visitors	Visited Mono Co. in Past 3 years		Children in Household		Respondent's age			Household income	
		No	Yes	No	Yes	18-29	30-49	50+	\$50K-\$99K	\$100K+
% of Total Visitors in Segment <sup>1</sup>	100.0%	31.8%-	68.2%+	69.9%	29.8%	11.1%	40.4%	48.0%	28.3%	36.9%
% Californians (of total visitors)	70.7%	49.5%-	82.5%+	68.1%	75.9%	75.9%	71.0%	69.3%	71.4%	79.6%
% International Resident	10.8%	25.8%+	2.5%-	11.0%	10.7%	7.5%	14.9%+	7.8%-	10.8%	6.2%-
% Have Visited in past 3 Years	64.1%	0.0%	100.0%	66.2%	60.0%	35.8%	58.6%-	69.4%+	70.5%+	67.7%
Avg. # Visits to MC in Past 3 Years (by those who visited)	5.17	*	5.17	5.68	3.93-	6.40	4.19-	5.77	5.14	5.62
% Mono County Day Visitors	35.6%	41.8%+	32.1%	40.6%+	26.0%-	32.7%	33.6%	38.2%	37.5%	29.3%-
Avg. Nights Stay in MC (all visitors)	2.49	2.02-	2.71+	2.23-	2.89+	2.46	2.46	2.47	2.28	2.83+
Avg. Nights Stay in MC (overnighters) <sup>2</sup>	3.82	3.50-	4.01+	3.73	3.90	3.72	3.66	4.17	3.65	3.97
% Used Lodging's Internet web site to reserve Mono lodging <sup>3</sup>	26.4%	29.8%	24.6%	22.6%-	31.2%	27.6%	26.1%	26.6%	27.4%	30.2%
Avg. # of Weeks in Advance reserved lodging	7.48	7.62	7.40	6.82	8.16	4.22	8.06	7.94	8.07	7.68
% Mono County is Main Destination	65.4%	46.1%-	76.3%+	63.3%	69.0%	72.3%	63.0%	66.2%	67.0%	71.1%+
Satisfaction Rating (5= highest – 1 = lowest)	4.66	4.39-	4.81+	4.67	4.66	4.59	4.58	4.75+	4.66	4.73
Average # Persons in travel group	3.79	3.72	3.81	3.39-	4.85+	3.67	4.21+	3.53-	3.55-	4.08+
Median Respondent Age (years)	48.27	46.09-	49.67+	52.22+	44.30-	23.5	41.36-	58.29+	48.60	48.66
Median Annual Household Income	\$92,600	\$88,800	\$94,300	\$84,300-	\$113,600+	\$33,100-	\$99,800	\$95,600	\$79,300-	\$167,400+

<sup>1</sup> Average as reported from the survey and may differ from those used in the economic impact

<sup>2</sup> Average length of stay for all overnight visitors in that segment.

<sup>3</sup> Percentage of all visitors in that segment not only those staying overnight; differs from stay estimated by the economic impact model.

<sup>4</sup> Includes the lodging's website as well as a general travel website.

Note, Data are generally read down each column not across rows.

## **SECTION 7 - FINAL OBSERVATIONS**

This study has provided a comprehensive picture of the economic and fiscal contributions of tourism in Mono County. In 2008, the Mono County visitor market captured 1.5 million non- visitors of which two-thirds were overnight guests lodging in Mono County.

The countywide visitor market yielded significant economic and fiscal impacts, generating nearly \$370 million in direct total spending of which \$118 million; nearly one-third was for lodging. Total visitor spending yielded more than \$16 million in related taxes and supported an estimated 4,500 jobs.

Spending impact was counter to visitor volume in certain seasons. For example in Winter, with the lowest volume of 225,700 visitors or 15% of the total, spending impact was highest at \$146 million or 40% of the total annual spent. Summer visitor volume was highest at nearly 600,000 visitors but had the second highest total spending, \$145 million. Fall was relatively strong in terms of volume with 419,000 visitors, but had the lowest spending (\$49 million), while Spring volume was just above winter, with 285,000 visitors who spent \$70 million.

These volume and spending impacts are related to both the types of lodging and length of stay. Fall visitors averaged 2.17 days and many lodged in lower cost cabins and campgrounds (tent and RV), while in Winter the longer average stay of 3.8 days combined with utilization of costlier condo and hotel lodging drove spending higher. The challenge and opportunity is to extend Fall and Spring length of stay and perhaps to work to shift some from lower to higher priced lodging in order to optimize economic impact and fiscal return.

Two-thirds stayed overnight in Mono County, considered a fairly high overnight capture rate and a positive impact on generating higher yield spending, although many of the visitors stayed in low cost campgrounds. However, their multiple day stay boosted their overall trip spending impact on goods and services while in the area.

Interestingly, the average visitor reserved their Mono County lodging nearly eight weeks in advance. This long lead-time seems to offer an excellent opportunity for direct marketing about things to do and see before they arrive to those identified through their reservation. Special promotions may be most effective if seasonally based and considered on a co-op basis, spearheaded by the Mono County Economic Development Department, with visitor serving businesses throughout the county to be cost effective and offer the businesses wider exposure. And, as nearly 30% made their reservation over the Internet (providing e-mail and other key contact information) the Internet may be a very cost effective approach for this purpose.



Mono County visitation and as a result lodging demand are highly seasonal. Overall, lodging operated at a combined annual average of 39%. This varied by lodging type and season, ranging from 52% in the Summer to 27% in the Fall. Such rates are not considered as optimal for operations although the overall average room rate of \$118 seems reasonable in today's marketplace. However this rate varied by area with Mammoth Lakes properties at \$173 for the year versus \$48 for Mono County. The rate is skewed by the presence of higher rate condos and full service hotels in Mammoth Lakes, with lower rate campsites, cabins and motels concentrated in the county areas. It is also affected by seasonality factors; many Mono County lodgings are closed in the winter but Mammoth Lakes condos and hotels operate and command premium rates during the winter ski season.

Visitors were in Mono County mainly for pleasure/leisure purposes engaging in a variety of mainly outdoor activities on a year-round basis. Most visitors also ate in restaurants and went sightseeing or exploring in the area. However, far fewer did retail shopping and as a result retail was one of the smallest expenditure categories in total or per-capita. When away from home, visitors delight in retail activity as a diversion and to discover unique items about the area to take home as part of their trip. While current economy conditions are actually forcing retail outlets to close, an opportunity seems to exist for Mono County to plan now for such activity in order to be ready when the economy does improve.

Most were from California or from other U.S. states, mainly Nevada and Oregon, those adjacent to California, while just 11% were from foreign countries. Marketing efforts in California and adjacent states seems to be those that would be the most effective at this time.

On average, these visitors were aged in the late-forties, a slightly older skew, and from households with annual incomes of nearly \$93,000, well above the average for all U.S. households and U.S. traveling households.<sup>10</sup> About one-third traveled with someone under 18 years old, reflecting the destination's more adult orientation. However, a sizable segment of 18-30 year-olds visited. They are Mono County's future visitor base as the baby-boomer generation ages. Special promotions, programs and development may be worth considering to this segment to retain their loyalty now as young people and into the future.

Of note were the extremely positive satisfaction ratings across visitor segments and seasons. This is related to the relatively strong repeat visitation and number of annual trips taken to Mono County by repeat visitors. Increasing the ratio of first-time visitors while maintaining the volume of repeat visitation would help to raise overall volume, with special emphasis on Fall and Spring seasons.

This research has set an important benchmark for measuring tourism volume, impacts and a variety of visitor characteristics against which programs can be developed and future measures can be made and progress assessed.

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<sup>10</sup> The mean household income for all U.S. households was \$66,600 and it was \$68,800 for U.S. traveling households according to the Travel Industry Association of America, Domestic Travel Report for 2008.

## APPENDIX I – DETAILED VISITOR PROFILES

### All Mono County Visitors

- Overall, 71% of Mono County visitors were from California, with 11% from other states in the U.S., and 19% were International residents.
- Close to two-thirds, 64%, were repeat visitors to Mono County in the past three years. They averaged 5.2 total trips had in the past three years, or just under twice annually.
- More than one-third or 36% were day visitors (not staying overnight in Mono County).
- Of all visitors, 18% each stayed overnight in a Mono County hotel or rental residence. Of the overnight visitors, 28% each stayed in a Mono County hotel or rental residence.
- Overnight visitors stayed an average of 3.8 nights in Mono County.
- One-fourth or 26% of all Mono County overnight visitors made their lodging reservation on an Internet web site.
- Overnight visitors made their reservations an average 7.5 weeks in advance of this trip.
- For 65% of visitors, Mono County was their main destination.
- On average visitors rated their satisfaction with Mono County at 4.7 or “extremely satisfied”.
- Visitors traveled with an average of 3.8 people in their group, were an average of 48.3 years old, and had an average income of \$92,600.

**Table 58 - All Mono County Visitors**

Characteristic	Measure <sup>11</sup>	Characteristic	Measure
% of Sample In Segment	100%	% Reserved Mono County lodging on Internet	26%
% California Resident	71%	Avg. # Weeks in Advance Reserved Mono County lodging	7.5
% International Resident	11%	% Mono County Main Destination	65%
% Visited in past 3 Years	64%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.2	Avg. number of people in travel group	3.8
% Day Visitors	36%	Median age of Respondent (years)	48.3
Avg. nights stay in Mono County (all visitors)	2.5	Median Annual Household Income	\$92,600
Avg. nights stay in Mono County (overnight visitors)	3.8		

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<sup>11</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Mono County Summer Visitors

- Summer visitors comprised 26% of total visitors.
- Of these visitors, 72% were from California, 9% were International, and 20% were from other U.S. States.
- Three-fifths or 61% were repeat visitors within the past three years, and averaged 3.9 trips during that three-year period or once per year.
- More than one-third, or 37%, was day-only visitors in Mono County.
- The 63% who stayed overnight in Mono County averaged 4.5 nights.
- Overnight visitors reserved their lodging 10.2 weeks in advance, and 32% used the Internet to make the reservation.
- Mono County was the main destination for 62% of visitors.
- On average, Summer visitors rated their satisfaction with Mono County at 4.7 or “extremely satisfied”.
- Summer visitors traveled with an average of 4.0 people in their group and were an average age of 46.5 years with annual income levels of \$91,400.

**Table 59 - Mono County Summer Visitors**

Characteristic	Measure <sup>12</sup>	Characteristic	Measure
% of Sample In Segment	26%	% Reserved Mono County lodging on Internet	32%
% California Resident	72%	Avg. # Weeks in Advance Reserved Mono County lodging	10.2
% International Resident	9%	% Mono County Main Destination	62%
% Visited in past 3 Years	61%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	3.9	Avg. number of people in travel group	4.0
% Day Visitors	37%	Median age of Respondent (years)	46.5
Avg. nights stay in Mono County (all visitors)	2.9	Median Annual Household Income	\$91,400
Avg. nights stay in Mono County (overnight visitors)	4.5		

<sup>12</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Mono County Fall Visitors

- Fall visitors comprised 25% of total visitors.
- Of these visitors, 70% were from California, 20% from other U.S. States, and 10% were International.
- Three-fifths or 61% were repeat visitors within the past three years who averaged 5.8 trips during that three-year period, nearly 2 trips per year on average.
- More than one-half or 54% were day-only visitors in Mono County, the highest of the four seasons.
- Conversely, 46% stayed overnight in Mono County and averaged 3.3 nights, the lowest among all four seasons.
- Close to one-fifth or 19% of overnight visitors used the Internet to reserve their lodging and made their reservations an average of 4.3 weeks in advance.
- Mono County was the main destination for 56% of Fall visitors, the lowest among all four seasons.
- Fall visitors rated their satisfaction with Mono County a 4.6 or “extremely satisfied”.
- Fall visitors traveled with an average of 3.5 people in their group and were an average of 52.2 years of age, the oldest among other seasons. They also reported the lowest income level of \$87,400.

**Table 60 - Mono County Fall Visitors**

Characteristic	Measure <sup>13</sup>	Characteristic	Measure
% of Sample In Segment	25%	% Reserved Mono County lodging on Internet	19%
% California Resident	70%	Avg. # Weeks in Advance Reserved Mono County lodging	4.3
% International Resident	10%	% Mono County Main Destination	56%
% Visited in past 3 Years	61%	Satisfaction Rating (5=highest – 1=lowest)	4.6
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.8	Avg. number of people in travel group	3.5
% Day Visitors	54%	Median age of Respondent (years)	52.2
Avg. nights stay in Mono County (all visitors)	1.5	Median Annual Household Income	\$87,400
Avg. nights stay in Mono County (overnight visitors)	3.3		

<sup>13</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Mono County Winter Visitors**

- Winter visitors comprised 25% of total visitors.
- Of these visitors, 83% were from California, 10% from other U.S. States, and 7% were International.
- Nearly four-fifths or 79% were repeat visitors within the past three years who averaged 5.3 trips during that three-year period, less than 2 trips per year on average.
- Only 8% were day-only visitors in Mono County, substantially lower than the other three seasons.
- Conversely, 92% stayed overnight in Mono County and averaged 3.8 nights.
- More than one-third or 34% of overnight visitors used the Internet to reserve their lodging and reserved their lodging an average of 6.5 weeks in advance.
- Mono County was the main destination for 94% of Winter visitors, the highest among all four seasons.
- Winter visitors rated their satisfaction with Mono County a 4.6 or “extremely satisfied”.
- Winter visitors traveled with an average of 3.9 people in their group and were an average of 45.8 years of age, the youngest among other seasons. They also reported the highest income level of \$124,700.

**Table 61 - Mono County Winter Visitors**

Characteristic	Measure <sup>14</sup>	Characteristic	Measure
% of Sample In Segment	25%	% Reserved Mono County lodging on Internet	34%
% California Resident	83%	Avg. # Weeks in Advance Reserved Mono County lodging	6.5
% International Resident	7%	% Mono County Main Destination	94%
% Visited in past 3 Years	79%	Satisfaction Rating (5=highest – 1=lowest)	4.6
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.3	Avg. number of people in travel group	3.9
% Day Visitors	8%	Median age of Respondent (years)	45.8
Avg. nights stay in Mono County (all visitors)	3.4	Median Annual Household Income	\$124,700
Avg. nights stay in Mono County (overnight visitors)	3.8		

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<sup>14</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Mono County Spring Visitors

- Spring visitors comprised 25% of total visitors.
- Of these visitors, 61% were from California, 21% from other U.S. States, and 18% were International. More Spring visitors were from other countries compare to all other seasons.
- Nearly two-thirds or 64% were repeat visitors within the past three years who averaged 5.8 trips during that three-year period, nearly 2 trips per year on average.
- More than one-fourth or 28% were day-only visitors in Mono County.
- Conversely, 72% stayed overnight in Mono County and averaged 3.8 nights.
- Only 16% of overnight visitors used the Internet to reserve their lodging and Reserved their lodging an average of 7.3 weeks in advance.
- Mono County was the main destination for 64% of Spring visitors.
- Spring visitors rated their satisfaction with Mono County a 4.9 or “extremely satisfied”, the highest among all seasons.
- Spring visitors traveled with an average of 3.8 people in their group and were an average of 50.3 years of age. They also reported an income level of \$91,500.

**Table 62 - Mono County Spring Visitors**

Characteristic	Measure <sup>15</sup>	Characteristic	Measure
% of Sample In Segment	25%	% Reserved Mono County lodging on Internet	16%
% California Resident	61%	Avg. # Weeks in Advance Reserved Mono County lodging	7.3
% International Resident	18%	% Mono County Main Destination	64%
% Visited in past 3 Years	64%	Satisfaction Rating (5=highest – 1=lowest)	4.9
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.8	Avg. number of people in travel group	3.8
% Day Visitors	28%	Median age of Respondent (years)	50.3
Avg. nights stay in Mono County (all visitors)	2.8	Median Annual Household Income	\$91,500
Avg. nights stay in Mono County (overnight visitors)	3.8		

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<sup>15</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Southern Californian Visitors to Mono County

- Visitors from Southern California comprised 47% of all Mono County visitors.
- Three-fourths or 76% were repeat visitors within the past three years, and averaged 4.9 trips during that three-year period, or more than once per year on average.
- Only 16% of Southern Californians were day-only visitors in Mono County, the lowest among all origin groups.
- The 84% who stayed overnight in Mono County averaged 3.9 nights.
- Of all overnight Southern Californians, 28% used the Internet to reserve their lodging and made their reservations an average of 8.0 weeks in advance.
- Mono County was the main destination for the majority or 83% of Southern Californians.
- Southern Californians rated their satisfaction with Mono County at 4.7 or “extremely satisfied”.
- Visitors from Southern California traveled with an average of 4.3 people in their group and were an average age of 47.2 years. They indicated an income of \$100,400.

**Table 63 – Southern Californian Visitors to Mono County**

Characteristic	Measure <sup>16</sup>	Characteristic	Measure
% of Sample In Segment	47%	% Reserved Mono County lodging on Internet	28%
% California Resident	100%	Avg. # Weeks in Advance Reserved Mono County lodging	8.0
% International Resident	-	% Mono County Main Destination	83%
% Visited in past 3 Years	76%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	4.9	Avg. number of people in travel group	4.3
% Day Visitors	16%	Median age of Respondent (years)	47.2
Avg. nights stay in Mono County (all visitors)	3.3	Median Annual Household Income	\$100,400
Avg. nights stay in Mono County (overnight visitors)	3.9		

<sup>16</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Northern Californian Visitors to Mono County

- Visitors from Northern California comprised 14% of all Mono County visitors.
- Two-thirds or 65% were repeat visitors within the past three years, and averaged 4.1 trips during that three-year period, or more than once per year on average.
- More than one-half or 52% of Northern Californians were day-only visitors in Mono County.
- The 48% who stayed overnight in Mono County averaged 3.2 nights.
- Of all overnight Northern Californians, 23% used the Internet to reserve their lodging and Reserved their lodging an average of 6.1 weeks in advance.
- Mono County was the main destination for 59% of Northern Californians.
- Northern Californians rated their satisfaction with Mono County at 4.7 or “extremely satisfied”.
- Visitors from Northern California traveled with an average of 3.6 people in their group and were an average age of 48.7 years. They reported an income level of \$107,300.

**Table 64 – Northern Californian Visitors to Mono County**

Characteristic	Measure <sup>17</sup>	Characteristic	Measure
% of Sample In Segment	14%	% Reserved Mono County lodging on Internet	23%
% California Resident	100%	Avg. # Weeks in Advance Reserved Mono County lodging	6.1
% International Resident	-	% Mono County Main Destination	59%
% Visited in past 3 Years	65%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	4.1	Avg. number of people in travel group	3.6
% Day Visitors	52%	Median age of Respondent (years)	48.7
Avg. nights stay in Mono County (all visitors)	1.5	Median Annual Household Income	\$107,300
Avg. nights stay in Mono County (overnight visitors)	3.2		

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<sup>17</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.



### Other U.S. Resident Visitors to Mono County

- Less than one-fifth or 19% of all visitors to Mono County were from other U.S. states excluding California.
- More than one-half or 52% of other U.S. residents were repeat visitors to Mono County in the past three years. They visited an average of 4.9 times or more than once annually.
- The majority, 57%, were day visitors, with 43% staying overnight in Mono County.
- Other U.S. visitors' average staying overnight in Mono County stayed an average of 3.6 nights.
- They Reserved their Mono County lodging 6.6 weeks in advance, and 25% used the Internet to reserve their lodging.
- Less than one-half or 47% chose Mono County as their main destination.
- Other U.S. residents rated their satisfaction at 4.7 or "extremely satisfied".
- Visitors from other U.S. areas traveled with an average of 3.3 people in their group and were the oldest at an average age of 52.2 years. Their income level was also among the lowest at \$75,600.

**Table 65 – Other U.S. Resident Visitors to Mono County**

Characteristic	Measure <sup>18</sup>	Characteristic	Measure
% of Sample In Segment	19%	% Reserved Mono County lodging on Internet	25%
% California Resident	-	Avg. # Weeks in Advance Reserved Mono County lodging	6.6
% International Resident	-	% Mono County Main Destination	47%
% Visited in past 3 Years	52%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	4.9	Avg. number of people in travel group	3.3
% Day Visitors	57%	Median age of Respondent (years)	52.2
Avg. nights stay in Mono County (all visitors)	1.5	Median Annual Household Income	\$75,600
Avg. nights stay in Mono County (overnight visitors)	3.6		

<sup>18</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**All International Visitors**

- International visitors comprised 10% of 2008 visitor groups to Mono County.
- Less than one-fifth or 15%, were repeat visitors to Mono County in the previous three years and visited an average of 2.4 times during that time period.
- More than one-third, 37% of International visitors were visiting for the day only.
- The 63% of International visitors who stayed overnight in Mono County stayed an average of 3.9 nights.
- Those who stayed overnight in Mono County made their reservation 9.3 weeks in advance, with 22% making their lodging reservation on the Internet.
- Mono County was the main destination for 25% of all International visitors, lowest among all other visitors from the U.S. or different California regions. International visitors typically visit more destinations on their trips.
- International residents were “extremely satisfied” with Mono County as indicated by their average rating of 4.6.
- International visitors traveled with an average of 3.7 people in their group and averaged 44.6 years of age, the youngest among all other visitors.
- International visitors averaged annual household income of \$78,700, somewhat lower than income for Southern and Northern Californians.

**Table 66 - All International Visitors**

Characteristic	Measure <sup>19</sup>	Characteristic	Measure
% of Sample In Segment	10%	% Reserved Mono County lodging on Internet	22%
% California Resident	-	Avg. # Weeks in Advance Reserved Mono County lodging	9.3
% International Resident	100%	% Mono County Main Destination	25%
% Visited in past 3 Years	15%	Satisfaction Rating (5=highest – 1=lowest)	4.6
Avg. # Visits to Mono County past 3 Years (previous visitors only)	2.4	Avg. number of people in travel group	3.7
% Day Visitors	37%	Median age of Respondent (years)	44.6
Avg. nights stay in Mono County (all visitors)	2.4	Median Annual Household Income	\$78,700
Avg. nights stay in Mono County (overnight visitors)	3.9		

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<sup>19</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Day Visitors to Mono County

- Mono County day visitors comprised 15% of the total visitation, of which 59% were Californians, 30% were other U.S. residents, and 11% were International residents.
- Close to three-fifths or 58% were repeat visitors to Mono County in the past three years and made an average of 9.5 trips to Mono County during this time period, or more than 3 trips annually. Day visitors made more trips to Mono County than any other segment.
- Mono County was the main destination for 36% of day visitors.
- Day visitors were “very satisfied” with Mono County with their average rating of 4.4.
- They traveled in relatively small groups with an average of 3.3 people in their group and averaged 49.5 years of age.
- This segment reported annual household income was \$84,600.

**Table 67 - Mono County Day Visitors**

Characteristic	Measure <sup>20</sup>	Characteristic	Measure
% of Sample In Segment	15%	% Reserved Mono County lodging on Internet	-
% California Resident	59%	Avg. # Weeks in Advance Reserved Mono County lodging	-
% International Resident	11%	% Mono County Main Destination	36%
% Visited in past 3 Years	58%	Satisfaction Rating (5=highest – 1=lowest)	4.4
Avg. # Visits to Mono County past 3 Years (previous visitors only)	9.5	Avg. number of people in travel group	3.3
% Day Visitors	100%	Median age of Respondent (years)	49.5
Avg. nights stay in Mono County (all visitors)	-	Median Annual Household Income	\$84,600
Avg. nights stay in Mono County (overnight visitors)	-		

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<sup>20</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Tent Camping Visitors

- Tent campers comprised 11% of visitors to Mono County.
- Of these visitors, 78% were Californians, 19% were from other U.S. states, and 3% were International residents.
- The majority or 71% were repeat visitors to Mono County in the previous three years and visited an average of 4.1 times during that time period.
- Tent campers average 4.2 nights in Mono County and 21% Reserved their campground via the Internet. They also made their reservation an average 11.0 weeks in advance.
- Mono County was the main destination for 82% of all tent campers.
- Visitors camping in tents were “extremely satisfied” with Mono County as indicated by their average rating of 4.8.
- Tent campers traveled with an average of 3.8 people in their group and averaged 46.5 years of age.
- Tent campers reported an average annual household income of \$85,500.

**Table 68 – Tent Campers in Mono County**

Characteristic	Measure <sup>21</sup>	Characteristic	Measure
% of Sample In Segment	11%	% Reserved Mono County lodging on Internet	21%
% California Resident	78%	Avg. # Weeks in Advance Reserved Mono County lodging	11.0
% International Resident	3%	% Mono County Main Destination	82%
% Visited in past 3 Years	71%	Satisfaction Rating (5=highest – 1=lowest)	4.8
Avg. # Visits to Mono County past 3 Years (previous visitors only)	4.1	Avg. number of people in travel group	3.8
% Day Visitors	-	Median age of Respondent (years)	46.5
Avg. nights stay in Mono County (all visitors)	4.2	Median Annual Household Income	\$85,500
Avg. nights stay in Mono County (overnight visitors)	4.2		

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<sup>21</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### RV Camping Visitors

- Campers in RV parks/campgrounds comprised 8% of visitors to Mono County.
- Of these visitors, 89% were Californians, 7% were from other U.S. states, and 5% were International residents.
- Two-thirds or 66% were repeat visitors to Mono County in the previous three years and visited an average of 3.4 times or once annually during this three-year time period.
- Campers in RV parks average 5.5 nights in Mono County and 37% Reserved their spot via the Internet. They also made their reservation an average 13.4 weeks in advance, the longest lead time from any other visitor group.
- Mono County was the main destination for 77% of all tent campers in RV parks.
- Visitors camping in RVs were “extremely satisfied” with Mono County as indicated by their average rating of 4.9.
- RV campers traveled with an average of 4.2 people in their group and averaged 47.0 years of age.
- Campers in RV parks reported an average annual household income of \$90,800.

**Table 69 – RV Park Campers in Mono County**

Characteristic	Measure <sup>22</sup>	Characteristic	Measure
% of Sample In Segment	8%	% Reserved Mono County lodging on Internet	37%
% California Resident	89%	Avg. # Weeks in Advance Reserved Mono County lodging	13.4
% International Resident	5%	% Mono County Main Destination	77%
% Visited in past 3 Years	66%	Satisfaction Rating (5=highest – 1=lowest)	4.9
Avg. # Visits to Mono County past 3 Years (previous visitors only)	3.4	Avg. number of people in travel group	4.2
% Day Visitors	-	Median age of Respondent (years)	47.0
Avg. nights stay in Mono County (all visitors)	5.5	Median Annual Household Income	\$90,800
Avg. nights stay in Mono County (overnight visitors)	5.5		

<sup>22</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Hotel/Motel Guests

- Hotel/motels guests comprised 24% of visitors to Mono County.
- Of hotel patrons, 66% were Californians, 23% were International residents, and 12% were from other U.S. states.
- More than one-half or 58% were repeat visitors to Mono County in the previous three years and visited an average of 3.3 times or once annually during this three-year time period.
- Hotel guests average 2.8 nights in Mono County and 24% made their reservation via the Internet. They also made their reservation an average 4.2 weeks in advance.
- Mono County was the main destination for 69% of all hotel guests.
- Hotel guests were “extremely satisfied” with Mono County as indicated by their average rating of 4.7.
- Hotel guests traveled with an average of 3.6 people in their group and averaged 46.8 years of age. They reported an annual household income of \$97,300.

**Table 70 – Hotel/Motel Guests in Mono County**

Characteristic	Measure <sup>23</sup>	Characteristic	Measure
% of Sample In Segment	24%	% Reserved Mono County lodging on Internet	24%
% California Resident	66%	Avg. # Weeks in Advance Reserved Mono County lodging	4.2
% International Resident	23%	% Mono County Main Destination	69%
% Visited in past 3 Years	58%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	3.3	Avg. number of people in travel group	3.6
% Day Visitors	-	Median age of Respondent (years)	46.8
Avg. nights stay in Mono County (all visitors)	2.8	Median Annual Household Income	\$97,300
Avg. nights stay in Mono County (overnight visitors)	2.8		

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<sup>23</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Visitors Renting Condos, Townhomes, or s

- Visitors renting condos, townhomes, or s comprised 21% of visitors to Mono County.
- Of these visitors, 79% were Californians, 11% were from other U.S. states, and 10% were International residents.
- More than two-thirds or 70% were repeat visitors to Mono County in the previous three years and visited an average of 5.2 times or nearly twice annually during this three-year time period.
- Visitors renting these types of units averaged 4.1 nights in Mono County and 30% made their reservation via the Internet. They made their reservation an average 7.0 weeks in advance.
- Mono County was the main destination for the vast majority, or 90% of all renters. This was the highest among all visitor segments.
- Visitors renting residences were “extremely satisfied” with Mono County as indicated by their average rating of 4.7.
- Mono County visitors renting residences traveled with an average of 4.7 people in their group and averaged 48.2 years of age. They reported the highest annual household income of \$122,200 of all visitor lodging segments.

**Table 71 – Visitors Renting Condos, Townhomes, or s in Mono County**

Characteristic	Measure <sup>24</sup>	Characteristic	Measure
% of Sample In Segment	21%	% used lodging’s Internet web site to reserve Mono County lodging	30%
% California Resident	79%	Avg. # Weeks in Advance Reserved Mono County lodging	7.0
% International Resident	10%	% Mono County Main Destination	90%
% Visited in past 3 Years	70%	Satisfaction Rating (5=highest – 1=lowest)	4.7
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.2	Avg. number of people in travel group	4.7
% Day Visitors	-	Median age of Respondent (years)	48.2
Avg. nights stay in Mono County (all visitors)	4.1	Median Annual Household Income	\$122,200
Avg. nights stay in Mono County (overnight visitors)	4.1		

<sup>24</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visited Mono County in Past Three Years (Repeat)**

- Those who have visited Mono County in the past three years comprised 68% of all visitors.
- Of these visitors, nearly 83% were Californians, 14% were from other U.S. states, and 3% were International residents.
- Of course, all were repeat visitors to Mono County in the past three years and visited an average of 5.2 times or nearly twice annually during this three-year time period.
- Of this segment, 32% were day visitors while 68% stayed overnight in Mono County.
- All past visitors averaged 2.7 nights in Mono County, while past overnight visitors averaged 4.1 nights.
- One –quarter, 25% made their reservation via the lodging’s Internet site. They made their reservation an average of 7.4 weeks in advance.
- Mono County was the main destination for three–quarters, or 76% of all repeat visitors.
- Prior visitors were “extremely satisfied” with Mono County, indicated by their average rating of 4.81.
- Past Mono County visitors traveled with an average of 4.7 people in their group and averaged 49.7 years of age.
- They reported annual household income of \$94,300, just above the \$92,600 for all visitors.

**Table 72 – Visited Mono County in Past Three Years**

Characteristic	Measure <sup>25</sup>	Characteristic	Measure
% of Sample In Segment	68.2%+	% used Lodging’s Internet website to reserve Mono County lodging	24.6%
% California Resident	82.5%+	Avg. # Weeks in Advance Reserved Mono County lodging	7.40
% International Resident	2.5%-	% Mono County Main Destination	76.3%+
% Visited in past 3 Years	100.0%	Satisfaction Rating (5=highest – 1=lowest)	4.81+
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.17	Avg. number of people in travel group	3.81
% Day Visitors	32.1%	Median age of Respondent (years)	49.67+
Avg. nights stay in Mono County (all visitors)	2.71+	Median Annual Household Income	\$94,300
Avg. nights stay in Mono County (overnight visitors)	4.01+		

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<sup>25</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.



**Has Not Visited Mono County in Past Three Years (First-Time)**

- Those not having visited Mono County in the past three years comprised just one-third or 32% of all visitors.
- Of these, nearly one-half were Californians, 25% were from other U.S. states, and 25% were International residents. Typically first time visitors are from more dispersed geographic areas.
- Of this segment, 42% were day visitors while 58% stayed overnight in Mono County. This is also more typical as these visitors tend to be seeing more destinations on their first visit.
- All first-time visitors averaged 2.0 nights in Mono County, while first-time overnight visitors averaged 3.5 nights.
- Over one-quarter, 30% made their reservation via the lodging's Internet site. They made their reservation an average of 7.6 weeks in advance.
- Mono County was the main destination for only 46% of first-timers, again a typical pattern.
- First-time visitors were "extremely satisfied" with Mono County, indicated by their average rating of 4.39, but this was below the 4.8 of past visitors, again a typical result.
- Past Mono County visitors traveled with an average of 3.7 people in their group.
- They averaged 46 years of age, which is younger than age 48 for the total visitors.
- They reported annual household income of \$88,800, somewhat below the \$92,600 for all visitors.

**Table 73 – Has Not Visited Mono County in Past Three Years**

Characteristic	Measure <sup>26</sup>	Characteristic	Measure
% of Sample In Segment	31.8%-	% used Lodging's Internet website to reserve Mono County lodging	29.8%
% California Resident	49.5%-	Avg. # Weeks in Advance Reserved Mono County lodging	7.62
% International Resident	25.8%+	% Mono County Main Destination	46.1%-
% Visited in past 3 Years	0.0%	Satisfaction Rating (5=highest – 1=lowest)	4.39-
Avg. # Visits to Mono County past 3 Years (previous visitors only)	*	Avg. number of people in travel group	3.72
% Day Visitors	41.8%+	Median age of Respondent (years)	46.09-
Avg. nights stay in Mono County (all visitors)	2.02-	Median Annual Household Income	\$88,800
Avg. nights stay in Mono County (overnight visitors)	3.50-		

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<sup>26</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

### Visitors With Children Living in their Household

- Visitors with children living in their household comprised 30% of all visitors to Mono County.
- Of these visitors, 75% were Californians, 14% were from other U.S. states, and 11% were International residents.
- Six in ten, or 60% were repeat visitors to Mono County in the previous three years and visited an average of 3.9 times slightly more than once annually during the last three years.
- Of all visitors with children at home, only 26% were day visitors and thus 74% of them stayed overnight in Mono County.
- All visitors with children averaged 2.89 nights in Mono County while those who stayed overnight averaged 3.9 nights.
- Nearly one-third or 31% of the overnight visitors made their reservation via the lodging's Internet web site, and Reserved their lodging an average of 8 weeks in advance of the trip.
- Mono County was the main destination for 69% of this segment.
- Visitors with children at home were "extremely satisfied" with Mono County as indicated by their average rating of 4.85, among the highest ratings.
- Mono County visitors renting residences traveled with an average of 4.85 people in their group, the highest group size reflecting the presence of children on the trip.
- They averaged 44.3 years old, which is younger than age 48 for the total visitors.
- They reported annual household income of \$113,600, well above the \$92,600 for all visitors.

**Table 74 – Visitors With Children Living in their Household**

Characteristic	Measure <sup>27</sup>	Characteristic	Measure
% of Sample In Segment	29.8%	% used Lodging's Internet website to reserve Mono County lodging	31.2%
% California Resident	75.9%	Avg. # Weeks in Advance Reserved Mono County lodging	8.16
% International Resident	10.7%	% Mono County Main Destination	69.0%
% Visited in past 3 Years	60.0%	Satisfaction Rating (5=highest – 1=lowest)	4.66
Avg. # Visits to Mono County past 3 Years (previous visitors only)	3.93-	Avg. number of people in travel group	4.85+
% Day Visitors	26.0%-	Median age of Respondent (years)	44.30-
Avg. nights stay in Mono County (all visitors)	2.89+	Median Annual Household Income	\$113,600+
Avg. nights stay in Mono County (overnight visitors)	3.90		

<sup>27</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visitors with NO Children Living in their Household**

- Visitors without children living in their household comprised 70% of visitors to Mono County, a fairly high share, suggesting the destination’s lower appeal to families with children.
- Of these visitors, 68% were Californians, 21% were from other U.S. states, and 11% were International residents.
- Two-thirds or 66% were repeat visitors to Mono County in the previous three years and visited an average of 5.7 times or nearly twice annually during this three-year time period.
- Of all visitors without children, 41% were day visitors somewhat above the total average, and thus 59% stayed overnight in Mono County.
- All visitors without children averaged 2.2 nights in Mono County while those who stayed overnight averaged 3.7 nights.
- Just 21% made their reservation via the lodging’s Internet web site, which may be related to the segment’s relatively higher age. All without children staying overnight made their reservation an average 6.8 weeks in advance of the trip.
- Mono County was the main destination for 63% of this segment.
- Visitors with children at home were “extremely satisfied” with Mono County as indicated by their average rating of 4.67.
- These visitors traveled with an average of 3.39 people in their group.
- They averaged 52.2 years old, which is older than age 48 for the total visitors.
- They reported annual household income of \$84,300, below the \$92,600 for all visitors.

**Table 75 – Visitors with Children Living in their Household**

Characteristic	Measure <sup>28</sup>	Characteristic	Measure
% of Sample In Segment	69.9%	% used Lodging’s Internet website to reserve Mono County lodging	22.6%-
% California Resident	68.1%	Avg. # Weeks in Advance Reserved Mono County lodging	6.82
% International Resident	11.0%	% Mono County Main Destination	63.3%
% Visited in past 3 Years	66.2%	Satisfaction Rating (5=highest – 1=lowest)	4.67
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.68	Avg. number of people in travel group	3.39-
% Day Visitors	40.6%+	Median age of Respondent (years)	52.22+
Avg. nights stay in Mono County (all visitors)	2.23-	Median Annual Household Income	\$84,300-
Avg. nights stay in Mono County (overnight visitors)	3.73		

<sup>28</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visitors (Respondent) Aged 18 - 29**

- The visitor respondents aged 18-29 comprised 11% of all visitors to Mono County, the smallest age group.
- Of these visitors, 76% were Californians, 16% were from other U.S. states, and 8% were International residents.
- Nearly 36% were repeat visitors to Mono County in the previous three years, but those that did averaged 6.4 trips to Mono County, more than twice annually during the last three years.
- Of all visitors aged 18-29, 33% were day visitors, and thus 67% of them stayed overnight in Mono County.
- All visitors aged 18-29 averaged 2.46 nights in Mono County while those who stayed overnight averaged 3.7 nights.
- Over 27% made their reservation via the lodging's Internet web site.
- Those 18-39 staying overnight Reserved their lodging an average of 4.2 weeks in advance of the trip.
- Mono County was the main destination for 72% of this segment.
- These visitors with children at home were "very/extremely satisfied" with Mono County as indicated by their average rating of 4.59.
- Mono County visitors aged 18-29 traveled with an average of 3.67 people in their group.
- They averaged 23.5 years old.
- They reported annual household income of \$33,100, the lowest of any segment but this is not surprising, as income tends to rise with age.

**Table 76 – Visitors Aged 18-29**

Characteristic	Measure <sup>29</sup>	Characteristic	Measure
% of Sample In Segment	11.1%	% used Lodging's Internet website to reserve Mono County lodging	27.6%
% California Resident	75.9%	Avg. # Weeks in Advance Reserved Mono County lodging	4.22
% International Resident	7.5%	% Mono County Main Destination	72.3%
% Visited in past 3 Years	35.8%	Satisfaction Rating (5=highest – 1=lowest)	4.59
Avg. # Visits to Mono County past 3 Years (previous visitors only)	6.40	Avg. number of people in travel group	3.67
% Day Visitors	32.7%	Median age of Respondent (years)	23.5
Avg. nights stay in Mono County (all visitors)	2.46	Median Annual Household Income	\$33,100-
Avg. nights stay in Mono County (overnight visitors)	3.72		

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<sup>29</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visitor (Respondent) Aged 30 - 49**

- The visitor respondents aged 30-49 comprised 40% of all visitors to Mono County.
- Of these visitors, 71% were Californians, 14% were from other U.S. states, and 15% were International residents.
- Nearly 60% were repeat visitors to Mono County in the previous three years, and those that did averaged 4.2 trips to Mono County, just over one trip per year.
- Of the visitors aged 30 - 49, 34% were day visitors, and thus 67% of them stayed overnight in Mono County.
- All age 30 - 49 visitors averaged 2.46 nights in Mono County while those who stayed overnight averaged 3.7 nights.
- Over 26% made their reservation via the lodging's Internet web site, and Reserved their lodging an average of 8 weeks in advance of the trip.
- Mono County was the main destination for 63% of this segment.
- These visitors were "very/extremely satisfied" with Mono County as indicated by their average rating of 4.58.
- Mono County visitors aged 30 - 49 traveled with an average of 4.21 people in their group suggesting they were accompanied by children.
- They averaged 41.4 years old.
- They reported annual household income of \$99,800 just above the median of \$92,600 for all visitors.

**Table 77 – Visitors Aged 39 - 49**

Characteristic	Measure <sup>30</sup>	Characteristic	Measure
% of Sample In Segment	40.4%	% used Lodging's Internet website to reserve Mono County lodging	26.1%
% California Resident	71.0%	Avg. # Weeks in Advance Reserved Mono County lodging	8.06
% International Resident	14.9%+	% Mono County Main Destination	63.0%
% Visited in past 3 Years	58.6%-	Satisfaction Rating (5=highest – 1=lowest)	4.58
Avg. # Visits to Mono County past 3 Years (previous visitors only)	4.19-	Avg. number of people in travel group	4.21+
% Day Visitors	33.6%	Median age of Respondent (years)	41.36-
Avg. nights stay in Mono County (all visitors)	2.46	Median Annual Household Income	\$99,800
Avg. nights stay in Mono County (overnight visitors)	3.66		

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<sup>30</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visitors (Respondent) Aged 50+**

- The visitor respondents aged 50 and older comprised 48% of all visitors to Mono County, the single largest age group.
- Of these visitors, 69% were Californians, 23% were from other U.S. states, and 8% were International residents, thus more in this group were from outside California but fewer from outside the U.S.
- Nearly 70% were repeat visitors to Mono County in the previous three years, and those that did averaged 5.8 trips to Mono County, nearly two trips per year during the three year period.
- Of the visitors aged 50+, 38% were day visitors, and thus 62% stayed overnight in Mono County.
- All age 50+ visitors averaged 2.47 nights in Mono County, while those who stayed overnight averaged 4.17 nights.
- Over 26% made their reservation via the lodging's Internet web site, and Reserved their lodging an average of 8 weeks in advance of the trip.
- Mono County was the main destination for 66% of this segment.
- These visitors were "very/extremely satisfied" with Mono County as indicated by their average rating of 4.75.
- Mono County visitors aged 50+ traveled with an average of 3.5 people in their group.
- They averaged 58.3 years old.
- They reported annual household income of \$95,600 just above the median of \$92,600 for all visitors.

**Table 78 – Visitors in Mono County Aged 50+**

Characteristic	Measure <sup>31</sup>	Characteristic	Measure
% of Sample In Segment	48.0%	% used Lodging's Internet website to reserve Mono County lodging	26.6%
% California Resident	69.3%	Avg. # Weeks in Advance Reserved Mono County lodging	7.94
% International Resident	7.8%-	% Mono County Main Destination	66.2%
% Visited in past 3 Years	69.4%+	Satisfaction Rating (5=highest – 1=lowest)	4.75+
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.77	Avg. number of people in travel group	3.53-
% Day Visitors	38.2%	Median age of Respondent (years)	58.29+
Avg. nights stay in Mono County (all visitors)	2.47	Median Annual Household Income	\$95,600
Avg. nights stay in Mono County (overnight visitors)	4.17		

<sup>31</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visitor Household Annual Income \$50,000-\$99,999**

- Visitors with reported household incomes of \$50,000 - \$99,000 comprised 28% of all visitors to Mono County.
- Of these visitors, 71% were Californians, 18% were from other U.S. states, and 11% were International residents.
- Over 70% were repeat visitors to Mono County in the previous three years, and those that did averaged 5.14 trips to Mono County, nearly two trips per year during the three year period.
- Of these visitors, 38% were day visitors, and thus 62% stayed overnight in Mono County.
- All visitors in this income group averaged 2.28 nights in Mono County, while those who stayed overnight averaged 3.65 nights.
- Over 27% made their reservation via the lodging's Internet web site, and Reserved their lodging an average of 8 weeks in advance of the trip.
- Mono County was the main destination for 67% of this segment.
- These visitors were "very/extremely satisfied" with Mono County as indicated by their average rating of 4.66.
- Mono County visitors in the \$50,000- \$99,000 income group traveled with an average of 3.5 people.
- They averaged 48.6 years old.
- They reported annual household income of \$79,300 well below the median of \$92,600 for all visitors.

**Table 79 – Mono County Visitors with Annual Household Income of \$50,00-\$99,000**

Characteristic	Measure <sup>32</sup>	Characteristic	Measure
% of Sample In Segment	28.3%	% used Lodging's Internet website to reserve Mono County lodging	27.4%
% California Resident	71.4%	Avg. # Weeks in Advance Reserved Mono County lodging	8.07
% International Resident	10.8%	% Mono County Main Destination	67.0%
% Visited in past 3 Years	70.5%+	Satisfaction Rating (5=highest – 1=lowest)	4.66
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.14	Avg. number of people in travel group	3.55-
% Day Visitors	37.5%	Median age of Respondent (years)	48.60
Avg. nights stay in Mono County (all visitors)	2.28	Median Annual Household Income	\$79,300-
Avg. nights stay in Mono County (overnight visitors)	3.65		

<sup>32</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.

**Visitor Household Annual Income \$100,000 or More**

- Visitors with reported household incomes of \$100,000 or more comprised 27% of all visitors to Mono County.
- Of these visitors, 80% were Californians, 14% were from other U.S. states, and 6% were International residents.
- Two-thirds, 68% were repeat visitors to Mono County in the previous three years, and those that did averaged 5.62 trips to Mono County, nearly two trips per year during the three year period.
- Of these visitors, 29% were day visitors, and thus a relatively high 71% stayed overnight in Mono County.
- All visitors in this income group averaged 2.83 nights in Mono County, while those who stayed overnight averaged 3.97 nights.
- Over 30% made their reservation via the lodging's Internet web site, and Reserved their lodging an average of nearly 8 weeks in advance of the trip.
- Mono County was the main destination for 71% of this segment.
- These visitors were "very/extremely satisfied" with Mono County as indicated by their average rating of 4.73.
- Mono County visitors in the \$100,000+ income group traveled with an average of 4.1 people.
- They averaged 48.7 years old.
- They reported annual household income of \$167,400, significantly above the median of \$92,600 for all visitors.

**Table 80 – Visitors Renting Residences in Mono County**

Characteristic	Measure <sup>33</sup>	Characteristic	Measure
% of Sample In Segment	36.9%	% used Lodging's Internet website to reserve Mono County lodging	30.2%
% California Resident	79.6%	Avg. # Weeks in Advance Reserved Mono County lodging	7.68
% International Resident	6.2%-	% Mono County Main Destination	71.1%+
% Visited in past 3 Years	67.7%	Satisfaction Rating (5=highest – 1=lowest)	4.73
Avg. # Visits to Mono County past 3 Years (previous visitors only)	5.62	Avg. number of people in travel group	4.08+
% Day Visitors	29.3%-	Median age of Respondent (years)	48.66
Avg. nights stay in Mono County (all visitors)	2.83+	Median Annual Household Income	\$167,400+
Avg. nights stay in Mono County (overnight visitors)	3.97		

<sup>33</sup> For this and all other tables in this section, the figures shown are those from the intercept survey and may differ from those used in the economic impact. The figures in the tables represent all visitors in the segment, not only those staying overnight unless otherwise specified.



## APPENDIX 2 – LODGING INVENTORY

Property	Type	City	Zip	Daily units
Mono County (excl. Mammoth Lakes)				
Old House/Inn at Benton Hot Springs	B&B	Benton	CA 93512	8
Bridgeport Reservoir RV Park/Marina*	Camp/RV	Bridgeport	CA 93517	29
Hunewill Guest Ranch	Cabin	Bridgeport	CA 93517	5
Paradise Shores RV Park	RV Park	Bridgeport	CA 93517	44
Virginia Lakes Resort	Cabin	Bridgeport	CA 93517	19
Virginia Creek Settlement*	Cabin	Bridgeport	CA 93517	11
American Land & Leisure (BRD)	Res Agent	Bridgeport	CA 93517	433
Annett's Mono Village - Cabin	Cabin	Bridgeport	CA 93517	21
Annett's Mono Village - RV sites	RV Park	Bridgeport	CA 93517	350
Big Meadow Lodge	Cabin	Bridgeport	CA 93517	6
Doc & Al's Resort	Camp	Bridgeport	CA 93517	29
Doc & Al's Resort	RV Park	Bridgeport	CA 93517	8
Doc & Al's Resort	Cabin	Bridgeport	CA 93517	23
Twin Lakes Resort - Cabin	Cabin	Bridgeport	CA 93517	8
Twin Lakes Resort - RV	RV Park	Bridgeport	CA 93517	17
Willow Springs Motel & RV Park	Cabin	Bridgeport	CA 93517	8
Willow Springs Motel & RV Park	RV Park	Bridgeport	CA 93517	25
Best Western Ruby Inn	Hotel	Bridgeport	CA 93517	30
Bridgeport Inn	Hotel	Bridgeport	CA 93517	32
Silver Maple Inn &The Cain House	Inn/B&B	Bridgeport	CA 93517	28
Walker River Lodge	Motel	Bridgeport	CA 93517	40
Annett's Mono Village - Motel	Motel	Bridgeport	CA 93517	12
Bodie Victorian Hotel	Hotel	Bridgeport	CA 93517	9
Redwood Motel	Hotel	Bridgeport	CA 93517	22
Meadowcliff Resort	Hotel	Coleville	CA 96107	20
Recreation Resource Mng't (InyoNF)	Camp	Crowley Lake	CA 93514	330
Tom's Place Resort	Cabin	Crowley Lake	CA 93546	18
Browns Owens River Campgrounds	Camp	Crowley Lake	CA 93546	75
Crowley Lake Fish Camp	Camp	Crowley Lake	CA 93546	12
Crowley Lake Fish Camp	RV Park	Crowley Lake	CA 93546	7
Crowley Lake RV Park	RV Park	Crowley Lake	CA 93546	30
Hot Creek Ranch	Cabin	Crowley Lake	CA 93546	9
McGee Creek Lodge	Cabin	Crowley Lake	CA 93546	9
McGee Creek RV Park	RV Park	Crowley Lake	CA 93546	50
Mono Sierra Lodge	Cabin	Crowley Lake	CA 93546	8
Swiss Chalet Lodge	Hotel	Crowley Lake	CA 93546	21
Rainbow Tarns	B&B	Crowley Lake	CA93546	3
Big Rock Resort	Cabin	June Lake	CA 93529	8
Fern Creek Lodge	Cabin	June Lake	CA 93529	11
Lake Front Cabins	Cabin	June Lake	CA 93529	10
Reverse Creek Lodge	Cabin	June Lake	CA93529	15
Rocky Mountain Recreation (June)	Res Agent	June Lake	CA 93529	261
Silver Lake Resort - Cabins	Cabin	June Lake	CA 93529	16
Silver Lake Resort - RV Park	RV Park	June Lake	CA 93529	79
Golden Pines RV Park	RV Park	June Lake	CA93529	27

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<b>Property</b>	<b>Type</b>	<b>City</b>	<b>Zip</b>	<b>Daily units</b>
Grant Lake Marina Campground/RV	Camp/RV	June Lake	CA 93529	70
June Lake Pines Cottages	Cabin	June Lake	CA 93529	11
June Lake RV Park	RV Park	June Lake	CA 93529	20
Pine Cliff Resort	Cabin/RV	June Lake	CA 93546	250
The Four Seasons	Cabin	June Lake	CA 93529	5
The Haven	Cabin	June Lake	CA 93529	7
Whispering Pines Resort	Cabin	June Lake	CA 93529	27
Double Eagle Resort & Spa*	Hotel	June Lake	CA 93529	31
Gull Lake Lodge	Hotel	June Lake	CA 93529	14
Heidelberg Inn	Timeshare	June Lake	CA 93529	4
June Lake Motel	Hotel	June Lake	CA 93529	20
June Lake Villager Inn	Hotel	June Lake	CA 93529	23
Boulder Lodge	Hotel	June Lake	CA 93529	60
June Lake Properties Reservations	Condo	June Lake	CA 93529	50
Rainbow Ridge Realty and Reservations	Condo	June Lake	CA93529	33
Sierra Recreation (Lee Vining)	Res Agent	Lee Vining	CA 93546	233
Lundy Lake Campground	Camp	Lee Vining	CA 93541	50
Lundy Lake Resort	Cabin	Lee Vining	CA 93541	35
Mono Vista RV Park	RV Park	Lee Vining	CA 93541	50
Mono Vista RV Park - Campsites	Camp	Lee Vining	CA 93541	13
El Mono Motel & Latte Da Coffee	Motel	Lee Vining	CA 93541	11
Lake View Lodge	Hotel	Lee Vining	CA 93541	59
Murphey's Motel	Hotel	Lee Vining	CA93541	44
Yosemite Gateway Motel	Hotel	Lee Vining	CA 93541	18
Lee Vining Motel	Hotel	Lee Vining	CA 93541	11
Tioga Lodge	Hotel	Lee Vining	CA 93541	14
Rock Creek Lodge	Cabin	Tom's Place	CA 93546	20
Topaz Lake RV Park	RV Park	Topaz	CA96133	54
West Walker Motel	Hotel	Walker	CA 96107	10
Toiyabe Motel	Hotel	Walker	CA 96107	11
Andruss Motel	Hotel	Walker River	CA 96107	13
Sierra Retreat Motel	Hotel	Walker River	CA 96107	6
Convict Lake Resort	Cabin	Convict Lake	CA 93546	30
<b>Total Mono Co Areas</b>				<b>3,543</b>

Mono County Economic Development Department  
Economic and Fiscal Impacts and Visitor Profile of Mono County Tourism for FY 2008

Property	Type	City	Zip	Daily units
<b>Mammoth Lakes</b>				
Campgrounds - Mmth Lakes Basin	Camp	Mammoth Lakes	CA 93546	486
Devils Postpile Nat'l Monument	Camp	Mammoth Lakes	CA 93546	21
Edelweiss Lodge	Cabin	Mammoth Lakes	CA 93546	10
Mammoth Moutain RV Park*	Cabin	Mammoth Lakes	CA 93546	180
Tamarack Lodge Resort	Cabin	Mammoth Lakes	CA 93546	42
Camp High Sierra	Camp	Mammoth Lakes	CA 93546	58
Crystal Crag Lodge	Cabin	Mammoth Lakes	CA 93546	21
Reds Meadow Campgrounds	Res Agent	Mammoth Lakes	CA 93546	152
Wildyrie Lodge	Cabin	Mammoth Lakes	CA 93546	11
Wildyrie Lodge	Lodge	Mammoth Lakes	CA 93546	4
Alpenhof Lodge	Hotel	Mammoth Lakes	CA 93546	57
Austria Hof Lodge	Hotel	Mammoth Lakes	CA 93546	30
Econo Lodge/Wildwood Inn	Hotel	Mammoth Lakes	CA 93546	32
Mammoth Creek Inn	Hotel	Mammoth Lakes	CA 93546	25
Mammoth Inn & Condominiums*	Hotel	Mammoth Lakes	CA 93546	216
Quality Inn Mammoth	Hotel	Mammoth Lakes	CA 93546	61
Westin Monache Resort	Hotel	Mammoth Lakes	CA 93546	147
Cinnamon Bear Inn	Hotel	Mammoth Lakes	CA 93546	22
Davison Street Guest House	B&B	Mammoth Lakes	CA 93546	5
Holiday Inn Hotel & Suites	Hotel	Mammoth Lakes	CA 93546	71
Innsbruck Lodge	Motel	Mammoth Lakes	CA 93546	16
Mammoth Lakes Travelodge	Hotel	Mammoth Lakes	CA 93546	38
Motel 6 Mammoth Lakes	Hotel	Mammoth Lakes	CA 93546	151
Rodeway Inn Sierra Nevada	Hotel	Mammoth Lakes	CA 93546	156
Shilo Inn Suites - Mammoth Lakes	Hotel	Mammoth Lakes	CA 93546	70
Sierra Lodge	Hotel	Mammoth Lakes	CA 93546	36
The M Inn Mammoth	Hotel	Mammoth Lakes	CA 93546	10
White Horse Inn	B&B	Mammoth Lakes	CA 93546	5
1849 Condominiums	Condo	Mammoth Lakes	CA 93546	74
Fireside at the Village	Condo	Mammoth Lakes	CA 93546	4
Juniper Springs Resort	Condo	Mammoth Lakes	CA 93529	195
Mammoth Creek Conominiums	Condo	Mammoth Lakes	CA 93546	36
Mammoth Front Desk	Condo	Mammoth Lakes	CA 93546	50
Mammoth Mountain Chalets	Condo	Mammoth Lakes	CA 93546	20
Mammoth Properties Reservations	Condo	Mammoth Lakes	CA 93546	193
Snowcreek Resort	Condo	Mammoth Lakes	CA 93546	155
The Village at Mammoth	Condo	Mammoth Lakes	CA 93546	205
<b>Mammoth (less estim Condos)</b>				<b>3,065</b>
<b>Subtotal Estimated Condos</b>				<b>2,024</b>
<b>Total Mammoth</b>				<b>5,089</b>
<b>Grand Countywide Total</b>				<b>8,632</b>

### APPENDIX 3 – INTERCEPT QUESTIONNAIRE

Randomly approach people: Hello, I am conducting a survey today for the County of Mono to learn more about its visitors. This is not for any type of sales or solicitation. Do you have a few minutes? I will give you a thank you gift when we complete the survey.

#### 1. INTERVIEW LOCATION

- Bodie – visitor center
- Bridgeport Main St./Courthouse
- Crowley Lake –Toms Place Store
- Devil's Postpile
- June Lake – Main street/market/Tiger Bar
- Lee Vining/Tioga Pass
- Lee Vining/MobilMart
- Mammoth Mtn. Main Lodge
- Mammoth Mtn. – Canyon Lodge
- Mammoth Mtn. – Eagle Lodge
- Mammoth Lakes Ice Rink
- Mammoth Lakes – Lakes Basin
- Mammoth Lakes – Von's market area
- Mammoth Lakes – Village at Mammoth
- Mammoth Mtn. Adventure Center/Reds Meadow Shuttle
- Mammoth Lakes – Welcome visitor center/trolley-shuttle
- Mono Lake Visitor Center
- Walker – Walker Burger
- Shady Rest Park x-c Ski Area
- Tamarack Lodge x-c Ski Area
- Smokey Bear Flats
- Sonora Pass

**1a.** Are you a visitor or do you live within Mono County? Mono County is the area along Highway 395 including Crowley Lake, Toms Place, Mammoth and June Lakes, Lee Vining, Bridgeport and Walker. [IF MIXED GROUP, INTERVIEW NON-MONO COUNTY RESIDENT VISITOR(S)]

- Visitor CONTINUE
- Resident TERMINATE

**1b.** Are you US resident?

- Yes
- No SKIP TO 1d

**1c.** What state do you live in? (Listed)

**1c1.** If California what is your zip code? \_\_\_\_\_

**1d.** What country/region do you live in?

- Asia/Pacific Islands
- Australia/New Zealand
- Europe (other than Scandinavia)
- Scandinavia (Denmark, Finland, Iceland, Norway, Sweden)
- Central America
- Mexico
- South America
- Canada
- Middle East
- All Other (any not listed above)

2. How many times have you visited MONO COUNTY in the past three years?

- None/First visit SKIP TO 3a  
 Number \_\_\_\_\_

3.a Which of the following is your MAIN purpose TODAY for visiting MONO COUNTY?

3.b. Which of those are your OTHER purposes for visiting MONO COUNTY?

Main	Other	Purpose
<input type="radio"/>	<input type="checkbox"/>	Vacation/pleasure/to visit
<input type="radio"/>	<input type="checkbox"/>	Sightseeing or exploring the area
<input type="radio"/>	<input type="checkbox"/>	Outdoor recreation
<input type="radio"/>	<input type="checkbox"/>	To attend a special event - festival
<input type="radio"/>	<input type="checkbox"/>	To attend a special event - tournament or contest
<input type="radio"/>	<input type="checkbox"/>	To conduct business or attend a meeting/conference
<input type="radio"/>	<input type="checkbox"/>	Combining business or meeting and pleasure
<input type="radio"/>	<input type="checkbox"/>	To visit relatives/friends/personal visit
<input type="radio"/>	<input type="checkbox"/>	Passing through to another place/Yosemite
<input type="radio"/>	<input type="checkbox"/>	Other
XXXX	<input type="checkbox"/>	None/ No other purpose

4.a. Which of the following general activities have you or will you do in MONO COUNTY on this trip?

- |   |  |
|---|--|
| <input type="checkbox"/> Sightseeing/exploring the area                   | <input type="checkbox"/> Visit a museum              |
| <input type="checkbox"/> Outdoor recreation Ask 4b                        | <input type="checkbox"/> Just visit/socialize        |
| <input type="checkbox"/> Eat in restaurants                               | <input type="checkbox"/> Other Area activities       |
| <input type="checkbox"/> Visit historic sites or natural wonders          | <input type="checkbox"/> None - just passing through |
| <input type="checkbox"/> Shopping   | <input type="checkbox"/> None of the above or        |
| <input type="checkbox"/> Conduct business or attend a meeting/ conference |  |

4.b. Which of the following outdoor activities are you doing?

- |   |  |
|---|--|
| <input type="checkbox"/> Bicycle riding/bike racing | <input type="checkbox"/> Off-road motor sports                   |
| <input type="checkbox"/> Bird watching              | <input type="checkbox"/> Photography                             |
| <input type="checkbox"/> Boating/rowing/sailing     | <input type="checkbox"/> Rock-climbing                           |
| <input type="checkbox"/> Camping                    | <input type="checkbox"/> Rock hounding                           |
| <input type="checkbox"/> Fishing                    | <input type="checkbox"/> Skiing – cross-country/skating/telemark |
| <input type="checkbox"/> Golf                       | <input type="checkbox"/> Skiing – downhill                       |
| <input type="checkbox"/> Geo-caching                | <input type="checkbox"/> Sledding                                |
| <input type="checkbox"/> Hiking                     | <input type="checkbox"/> Snowboarding                            |
| <input type="checkbox"/> Hot springs                | <input type="checkbox"/> Snow-shoeing                            |
| <input type="checkbox"/> Horseback riding/pack trip | <input type="checkbox"/> Snowmobiling                            |
| <input type="checkbox"/> Ice-climbing               | <input type="checkbox"/> Scientific exploration                  |
| <input type="checkbox"/> Kayaking                   | <input type="checkbox"/> Other                                   |

4.c. Which of these MONO COUNTY attractions or areas have you or will you visit on this trip?  
(SHOW SCREEN LIST)

- |   |  |
|---|--|
| <input type="checkbox"/> Bodie  | <input type="checkbox"/> Mammoth Mountain (bike park, gondola, ski area) |
| <input type="checkbox"/> Bridgeport                                   | <input type="checkbox"/> Devil's Postpile/Red's meadow                   |
| <input type="checkbox"/> Coleville                                    | <input type="checkbox"/> Mono Lake area                                  |
| <input type="checkbox"/> Convict Lake                                 | <input type="checkbox"/> Rock Creek/Tom's Place                          |
| <input type="checkbox"/> Crowley Lake/McGee Creek                     | <input type="checkbox"/> Twin Lakes                                      |
| <input type="checkbox"/> Hot Creek/Old Benton                         | <input type="checkbox"/> Topaz (Nevada border)                           |
| <input type="checkbox"/> June Lakes area                              | <input type="checkbox"/> Virginia Lake                                   |
| <input type="checkbox"/> Lee Vining                                   | <input type="checkbox"/> Walker  |
| <input type="checkbox"/> Lundy Lake                                   | <input type="checkbox"/> Sonora Pass                                     |
| <input type="checkbox"/> Mammoth Lakes Town                           | <input type="checkbox"/> Smokey Bear Flats sled & snowmobile area        |
| <input type="checkbox"/> Mammoth – Lakes Basin area/x-c ski area      | <input type="checkbox"/> Other   |
| <input type="checkbox"/> Mammoth – Shady Rest x-c ski snowmobile area | <input type="checkbox"/> None of the above                               |

5a. How did you first hear about Mono County?

5b. What were your main SOURCES OF INFORMATION for MONO COUNTY in PLANNING this overall trip? (PROBE OTHER) (SHOW SCREEN)

a. First Hear	b. Sources	Information Source
<input type="radio"/>	<input type="checkbox"/>	Any destination Web site <span style="float: right;">Ask 5 c</span>
<input type="radio"/>	<input type="checkbox"/>	Any destination Visitor Guide <span style="float: right;">Ask 5 c</span>
<input type="radio"/>	<input type="checkbox"/>	A Mono County Chamber of Commerce or visitor bureau <span style="float: right;">Ask 5 c</span>
<input type="radio"/>	<input type="checkbox"/>	Mono County booth at a travel show
<input type="radio"/>	<input type="checkbox"/>	Family member/friend
<input type="radio"/>	<input type="checkbox"/>	General travel website like travelocity.com
<input type="radio"/>	<input type="checkbox"/>	Direct mail/e-mail from a Mono County venue or destination
<input type="radio"/>	<input type="checkbox"/>	Hotel or lodging
<input type="radio"/>	<input type="checkbox"/>	Newspaper or magazine ad or story
<input type="radio"/>	<input type="checkbox"/>	Own experience/been here before
<input type="radio"/>	<input type="checkbox"/>	Retail or Auto Club Guide book
<input type="radio"/>	<input type="checkbox"/>	Tour Operator
<input type="radio"/>	<input type="checkbox"/>	Travel Agent
<input type="radio"/>	<input type="checkbox"/>	Other
<input type="radio"/>	<input type="checkbox"/>	None

5c. Which area was that (multiple):

- |   |   |
|---|---|
| <input type="checkbox"/> Benton             | <input type="checkbox"/> Mammoth Mountain                                     |
| <input type="checkbox"/> Bridgeport         | <input type="checkbox"/> Mono County  |
| <input type="checkbox"/> California Tourism | <input type="checkbox"/> Northern Mono County Chamber: Walker/Coleville/Topaz |
| <input type="checkbox"/> June Lake          | <input type="checkbox"/> Other area   |
| <input type="checkbox"/> Lee Vining         |   |
| <input type="checkbox"/> Mammoth Lakes      |   |

- 6a.** What is your MAIN destination on this OVERALL trip (not just today)?  
**6b.** Which OTHER areas are you also visiting on this trip?

Main	Other	Destination
<input type="radio"/>	<input type="checkbox"/>	MONO COUNTY
<input type="radio"/>	<input type="checkbox"/>	Other Eastern Sierra areas along Highway 395
<input type="radio"/>	<input type="checkbox"/>	Yosemite National Park
<input type="radio"/>	<input type="checkbox"/>	Death Valley
<input type="radio"/>	<input type="checkbox"/>	Other Northern California area (SFO, Tahoe, etc.)
<input type="radio"/>	<input type="checkbox"/>	Southern California areas (Santa Barbara to San Diego)
<input type="radio"/>	<input type="checkbox"/>	All California
<input type="radio"/>	<input type="checkbox"/>	Reno, Tahoe or Las Vegas Nevada
<input type="radio"/>	<input type="checkbox"/>	Other Nevada or Western States areas
<input type="radio"/>	<input type="checkbox"/>	California and/or other Western States
<input type="radio"/>	<input type="checkbox"/>	USA (California plus other areas)
<input type="radio"/>	<input type="checkbox"/>	All other areas (not listed above)
XXX	<input type="checkbox"/>	None- no other areas

- 7.** What transportation are you using to GET AROUND the MONO COUNTY area while here?

<input type="checkbox"/>	Personal car/truck/van/SUV	<input type="checkbox"/>	Motorcycle
<input type="checkbox"/>	Rental car/truck/van/SUV	<input type="checkbox"/>	Walking
<input type="checkbox"/>	Recreational vehicle	<input type="checkbox"/>	Mammoth Trolley/Shuttle
<input type="checkbox"/>	Tour van or bus	<input type="checkbox"/>	Public transit
<input type="checkbox"/>	Bicycle	<input type="checkbox"/>	Other

- 8.** How many nights will you be away from home on this trip IN TOTAL and SPECIFICALLY as follows ...  
 ADD NUMBER OF NIGHTS AND CONFIRM TOTAL WITH RESPONDENT

\_\_\_\_\_ Nights in MONO COUNTY  
 \_\_\_\_\_ Nights in all other locations/destinations on this trip

**8Ev.** Evaluator - Skips to 12 if did not spent a night in MONO COUNTY (v12=0) go to 12

- 9.** You said you are spending \_\_\_ nights in MONO COUNTY; What type of lodging are you staying in and for how many nights in each type IN MONO COUNTY?

Lodging Type in MONO COUNTY	# Nights
<input type="radio"/> Hotel or motel or inn	
<input type="radio"/> Rental Condo or townhouse or	
<input type="radio"/> Private home/condo of friends, family - unpaid	SKIP TO 12
<input type="radio"/> Cabin rental	
<input type="radio"/> Campground – tent	
<input type="radio"/> RV park/campground	
<input type="radio"/> Other form of PAID lodging	
<input type="radio"/> Other form of UNPAID lodging	SKIP TO 12
<input type="radio"/> Not staying overnight in MONO COUNTY- here for the day only	SKIP TO 12

**10.** How did you actually make your MONO COUNTY lodging reservation?

- On the lodging Internet site
- Area or resort reservation bureau
- On a travel Internet site like hotels.com, Travelocity etc
- area friend or relative reserved
- Direct call to the property or chain
- Through a travel agent
- Through my/our tour arranger or operator
- My company booked it
- Didn't make a reservation Skip to
- Other (Specify) \_\_\_\_\_

**11.** How many weeks in advance did you make your MONO COUNTY lodging reservation?

- 0 (Did not plan ahead/decided or referred here)
- 1 week
- 2 weeks
- 3-4 weeks
- 5-8 weeks
- 9-12 weeks
- More than 12 weeks

**12.** Thinking about all the things you are doing TODAY in MONO COUNTY, about how much did or will you spend on the following items ... WRITE AMOUNT IN \$USD TAP NEXT TO CONTINUE

**12a.** How much on ...? (If package break out fees and rentals or transportation and lodging, etc.)

- \$\_\_\_\_\_ PAID lodging (per night in MONO) [\$0 if not overnight in paid lodging] [Go to 13a1]
- \_\_\_\_\_ Meals out/snacks
- \_\_\_\_\_ Drinks/beverages
- \_\_\_\_\_ Shopping/Gifts/Souvenirs
- \_\_\_\_\_ Admissions to recreation venues or attractions (including ski/trail passes)
- \_\_\_\_\_ Transportation (gas, car rental, parking, etc)
- \_\_\_\_\_ Recreation supply or equipment rental or purchase
- \_\_\_\_\_ Groceries/personal and incidental items

**13aEv.** Evaluator - If spend more than \$ 0, ask how many rooms, else go to 14

**13a1.** How many lodging units did you rent? \_\_\_\_\_ Number of units

**14.** For all the spending you just told me, how many of you is that for? \_\_\_\_\_ Number of people:

**15.** Overall, how satisfied are you with MONO COUNTY as a visitor destination?

- Extremely satisfied Ask 15 a
- Very satisfied Ask 15 a
- Somewhat satisfied Ask 15a
- Somewhat unsatisfied Ask 15b
- Very unsatisfied Ask 15b
- DK (DO NOT READ) Skip to 16



**15a.** Why do you say that you are satisfied ? (DO NOT READ LIST; PROBE - ANYTHING ELSE)

- |   |  |
|---|--|
| <input type="checkbox"/> Scenic beauty/beautiful area                 | <input type="checkbox"/> Friendly people                         |
| <input type="checkbox"/> Has the activities I/we want to do           | <input type="checkbox"/> Good value                              |
| <input type="checkbox"/> Good for families/family friendly            | <input type="checkbox"/> Nice customer service                   |
| <input type="checkbox"/> Clean air/good environment                   | <input type="checkbox"/> Like my lodging accommodation           |
| <input type="checkbox"/> Relaxing area & activities/good get-way area | <input type="checkbox"/> Like/love the area/been here many times |
| <input type="checkbox"/> Cleanliness                                  | <input type="checkbox"/> Many things to see and do               |
| <input type="checkbox"/> Uncongested                                  | <input type="checkbox"/> Other (Specify) _____                   |

**15b.** Why do you say that you are dissatisfied ? (DO NOT READ LIST; PROBE - ANYTHING ELSE)

- |  |   |
|--|---|
| <input type="checkbox"/> Cleanliness/not clean               | <input type="checkbox"/> Don't like it - bad area           |
| <input type="checkbox"/> Congested                           | <input type="checkbox"/> Few things to see and do           |
| <input type="checkbox"/> Not friendly                        | <input type="checkbox"/> Too far to drive to/no air service |
| <input type="checkbox"/> Poor value                          | <input type="checkbox"/> Too expensive                      |
| <input type="checkbox"/> Poor/Bad customer service           | <input type="checkbox"/> Other (Specify) _____              |
| <input type="checkbox"/> Don't like my lodging accommodation |   |

**DEMO.** Now just a few more quick questions. TAP NEXT TO CONTINUE

**16a.** Which best describes your immediate travel group on this trip?

- Alone
- A couple
- A family group
- A group of friends or co-workers
- A mixed group of family and friends
- Other

**16b.** Are you traveling with an organized tour group on this trip?

- Yes
- No

**17.** In your IMMEDIATE group how many others are traveling with you ...?

\_\_\_\_\_ under the age of 18:  
\_\_\_\_\_ 18 or over:

**18.** (show screen) What LETTER represents your age group?

- a. 18-29
- b. 30-39
- c. 40-49
- d. 50-59
- e. 60+
- ref

19. Which of the following best describes your household composition?

- a. Single/unmarried
- b. Married
- c. Group of unrelated individuals
- d. Extended family group
- e. Other

20. Do you have any children living with you in the following age groups? (check all that apply)

- No children living with me
- Infant – 5 years old
- 6 – 11 years old
- 12 – 18 years old

21. (SHOW SCREEN) Please indicate which number on this card represents your total expected 2007 household income? IN US DOLLARS

- 1. Under \$30,000
- 2. \$30,000 - \$49,999
- 3. \$50,000 - \$74,999
- 4. \$75,000 - \$99,999
- 5. \$100,000 - \$199,999
- 6. \$200,000 - \$500,000
- 7. Over \$500,000
- ref

22. RECORD RESPONDENT GENDER BY OBSERVATION

- Male
- Female

**Thank you very much – here is your thank you gift.**