

Mono County Tourism Commission

Economic Impacts and

Profile of Mono County Visitors



February 27, 2009

Study Objectives

- To develop a **profile** of Mono County visitors including:
 - *Trip planning* characteristics
 - *On-site behaviors, activities and spending*
 - *Visitor Demographics*
- To estimate **MC tourism economic impacts** for FY 2008 (June 2007 – May 2008)
 - *Visitor Volume* – number of visitors overall and by segment (hotel, home & day)
 - *Visitor Spending* - overall and by category
 - *Local Taxes* generated
 - *Employment* supported from visitor spending

Methodology

1. **On-site intercept** interviews among “visitors” i.e., who reside outside Mono County
 - Four “waves” by season, 300 surveys each, 1214 total
 - Conducted by professional interviewers - using hand-held computer
 - Locations throughout the County: 69% in Mono Co., 31% in Mammoth areas

Survey Period/(Season)	Complete Interviews
Wave 1 – Summer (July-Aug 2007)	314
Wave 2 – Fall (October 2007)	300
Wave 3 – Winter (Feb 2008)	300
Wave 4 - Spring Winter (April 2008)	300
Total	1,214

Methodology

2. Lodging Survey:

- Developed comprehensive inventory of all Mono County Paid lodging
- Occupancy and average rate for Mono County's paid lodging, collected from the properties.
- Tabulated to assess:
 - occupied room nights & average room rate by season
 - occupied room nights & average room rate for the year

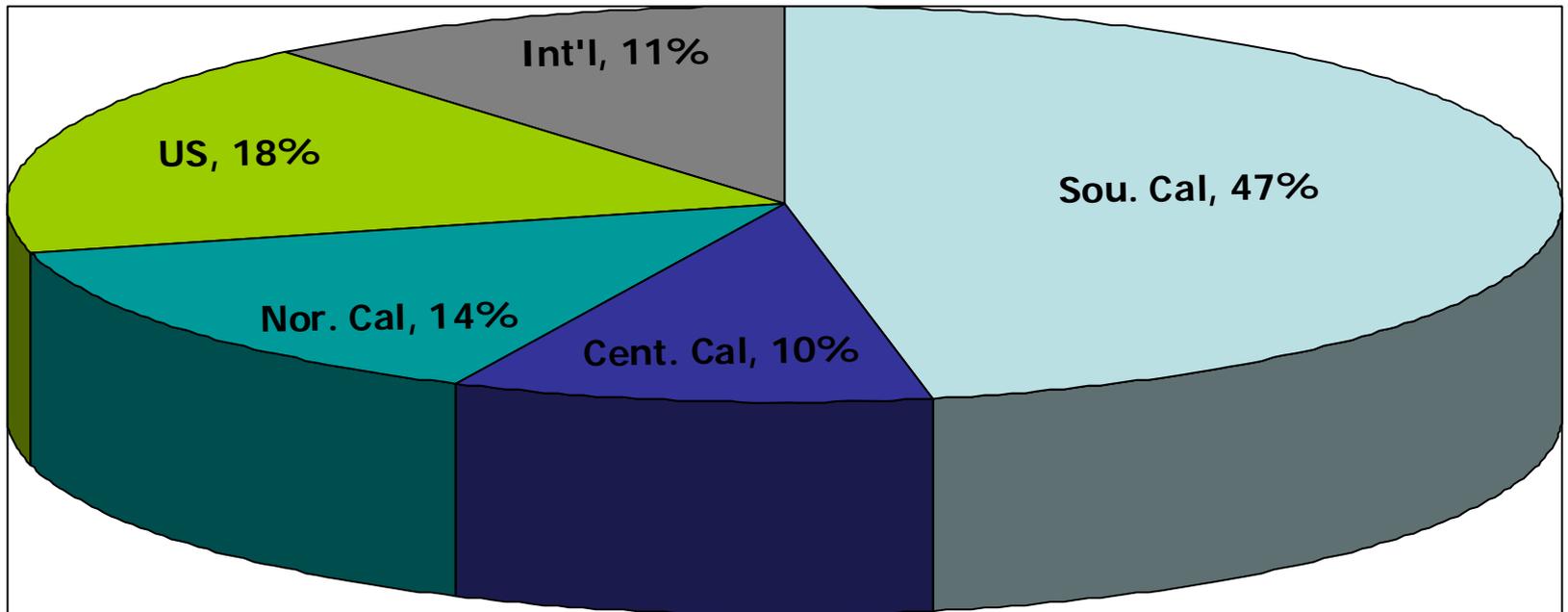
Summary of Findings

- **Visitor Profile (from Intercept Surveys)**
- **Economic & Fiscal Impacts, and Employment (calculated from Intercept responses)**

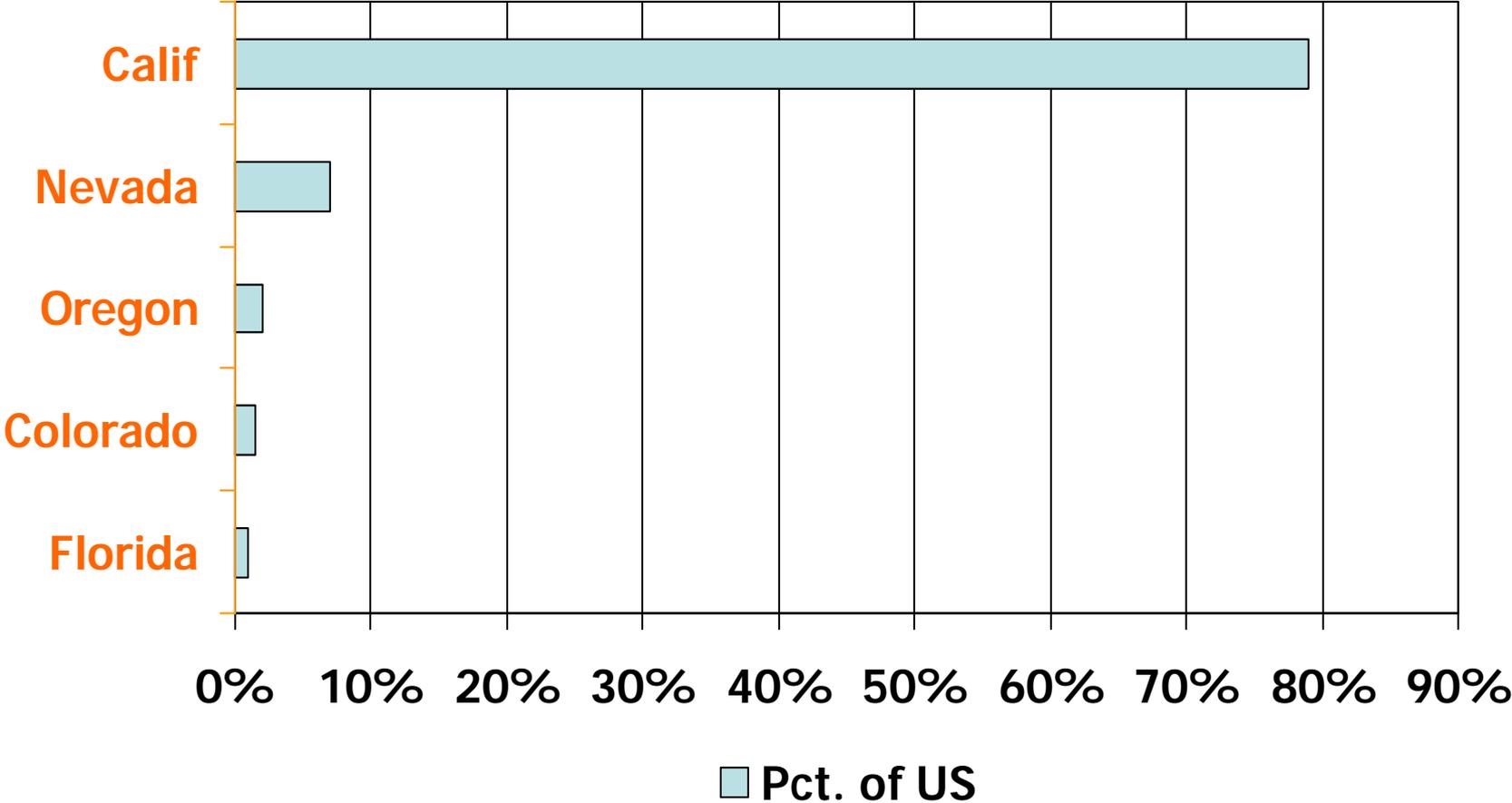
Visitor Residence area

- Overall, 71% were Californians; 18% from other U.S. states; 11% non-U.S. Thus, 89% were U.S residents.

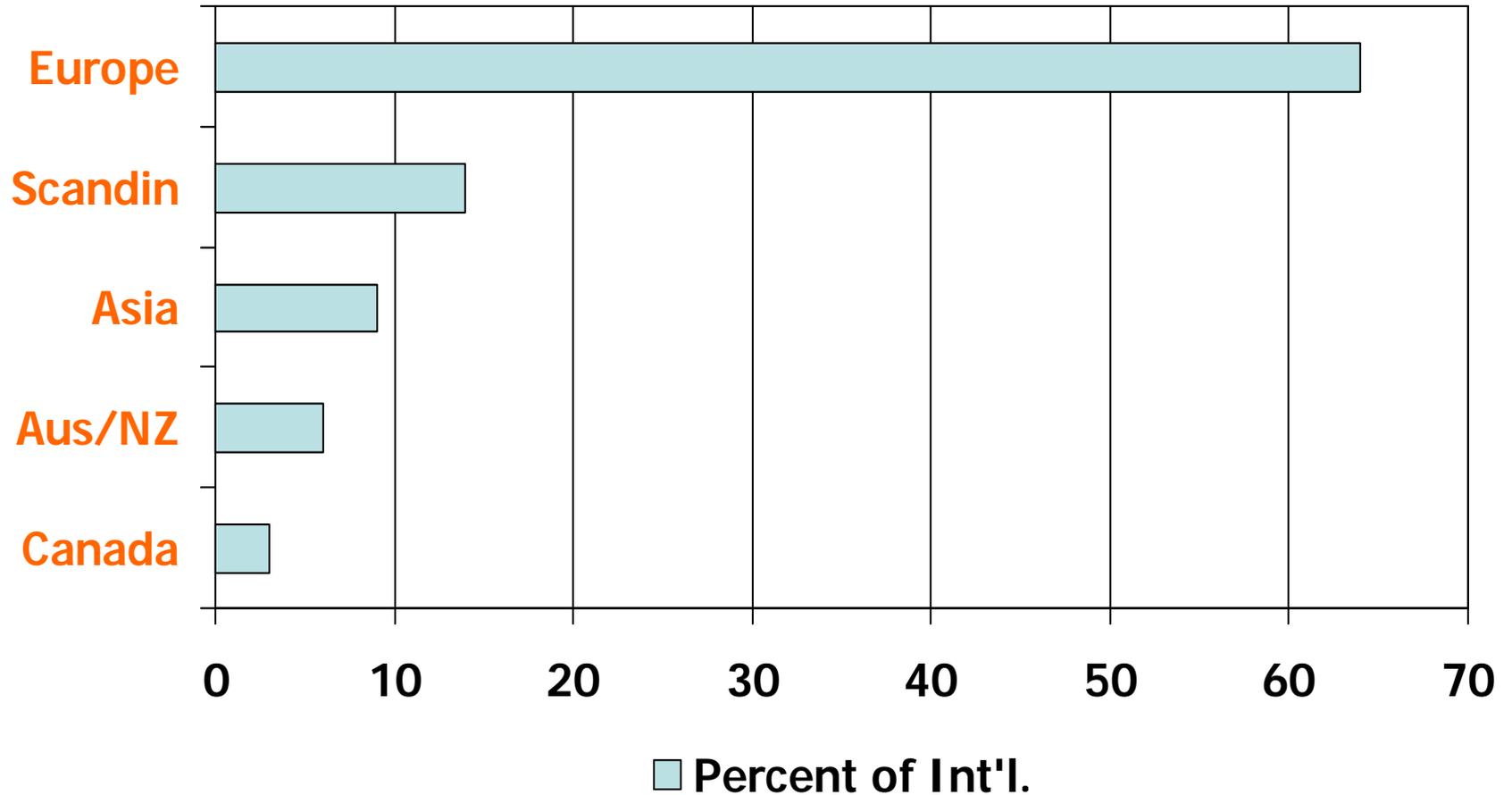
Visitor Residence



Top 5 States



Top 5 International Regions



Past Visitation

- In the past 3 years:
 - 64% have visited Mono County
 - 36% were first timers.
- Past Mono County visitors averaged 5 visits in that period, or about 1.2 avg. visits/year.
 - 27% visited 10 + times in past 3 years
 - Central Californians visited on average 15 X in 3 years; but many of them are day visitors

Satisfaction with Destination

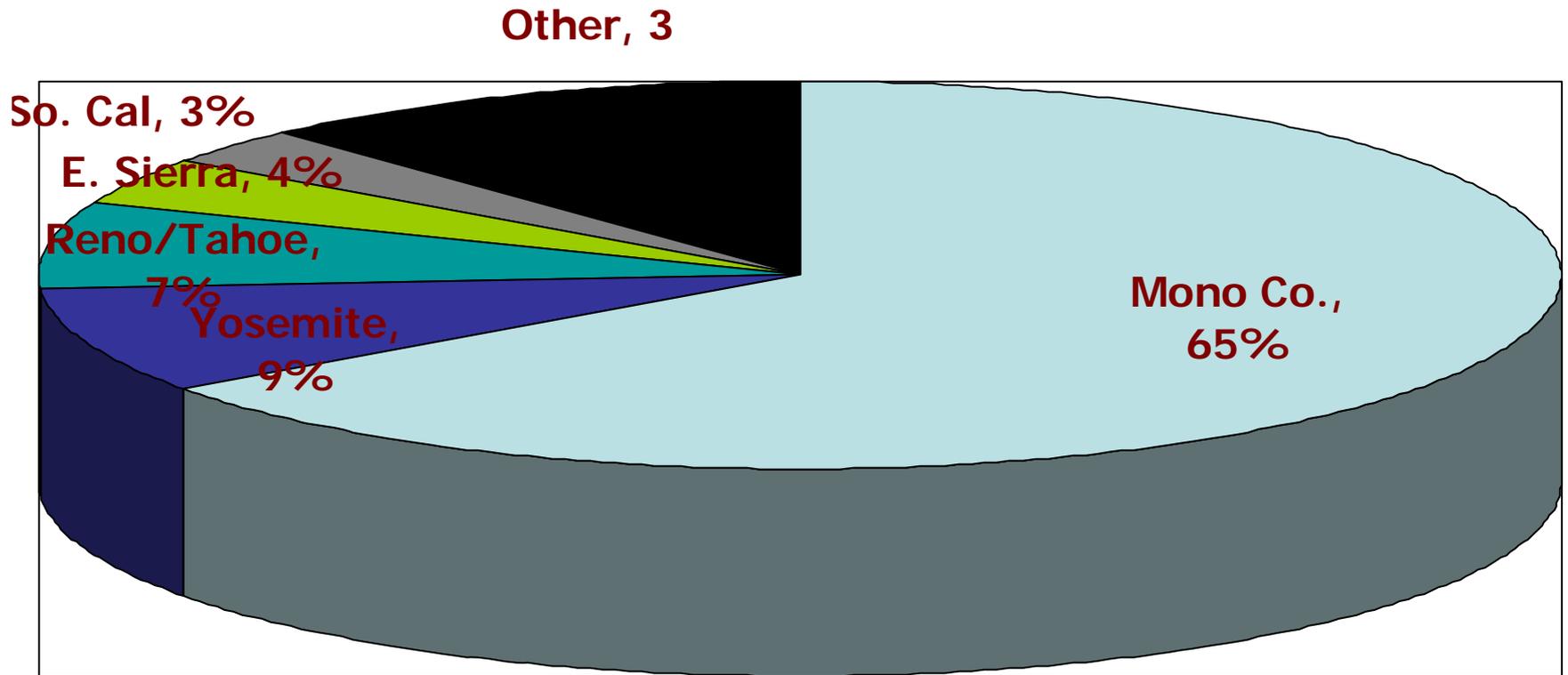
- Almost all, 95% were “Extremely” or “Very satisfied” with Mono County as a destination
- Mono County rated 4.66 (of 5.00) overall
- Main reasons high satisfaction included:
 - Scenic beauty
 - Activities

Information Sources Used

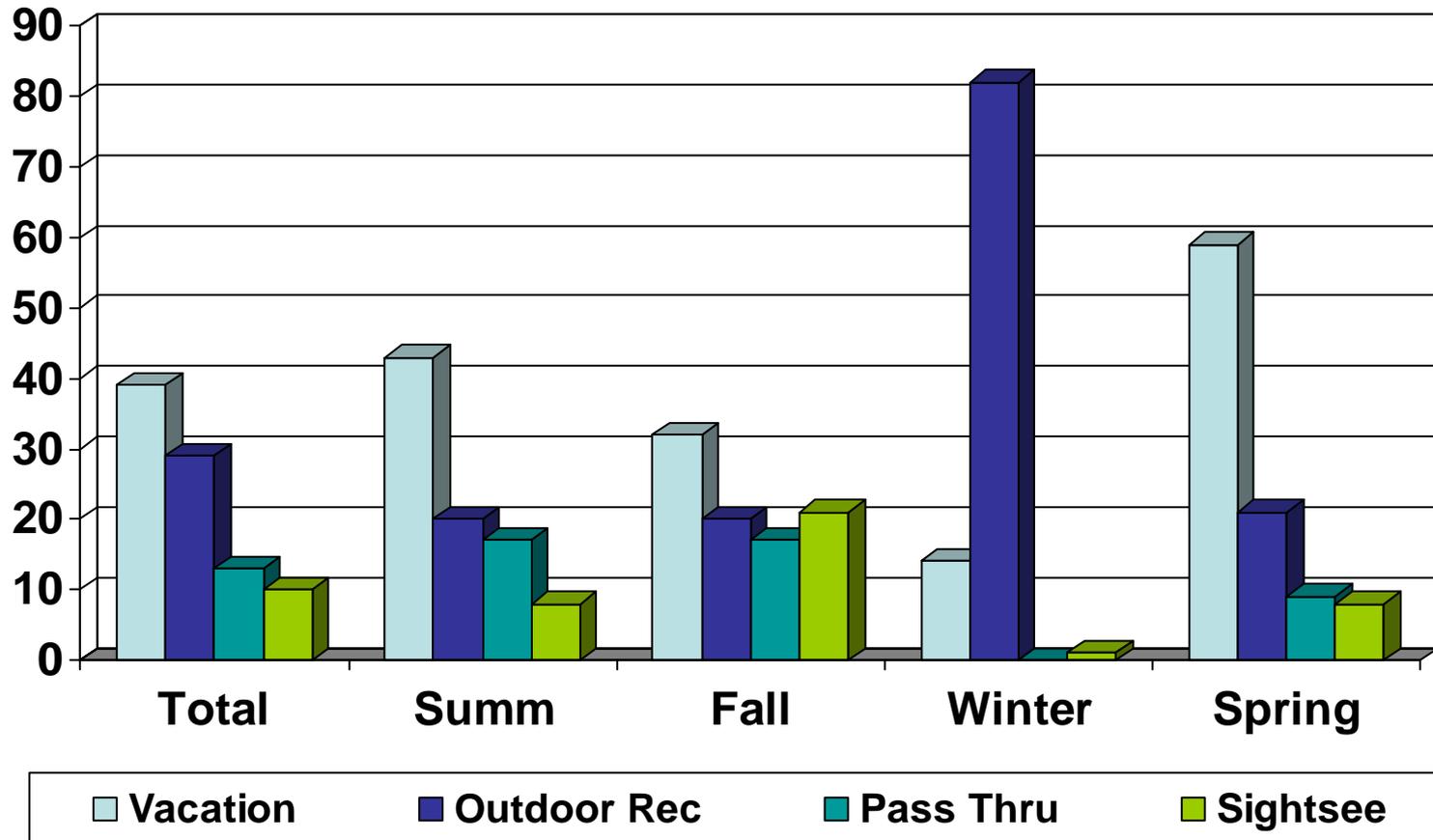
For Mono County information in *planning* this trip:

- 45% mainly used their past experience
- 42% used a family member/friend
- 29% used any destination website

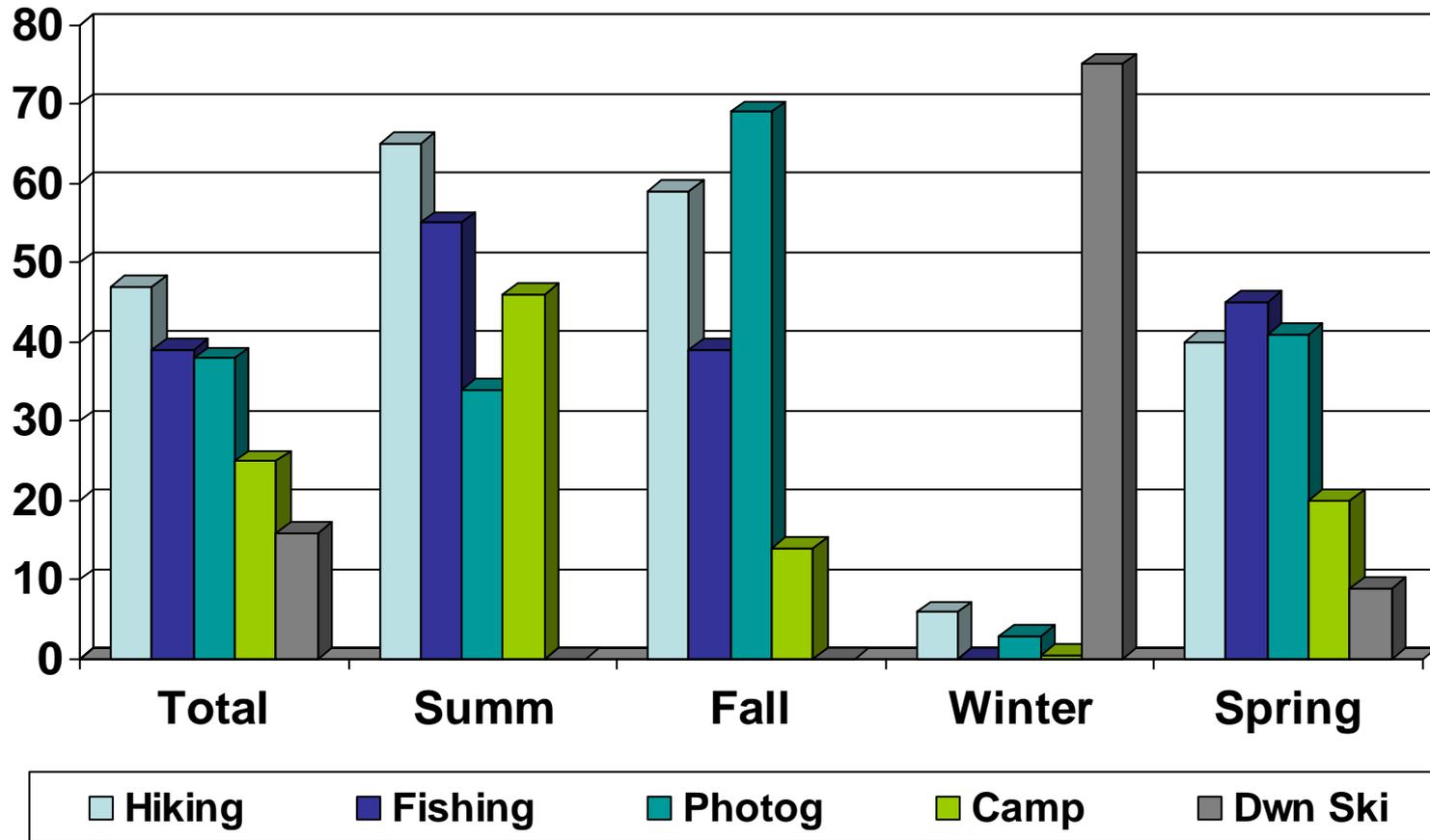
Main Trip Destination



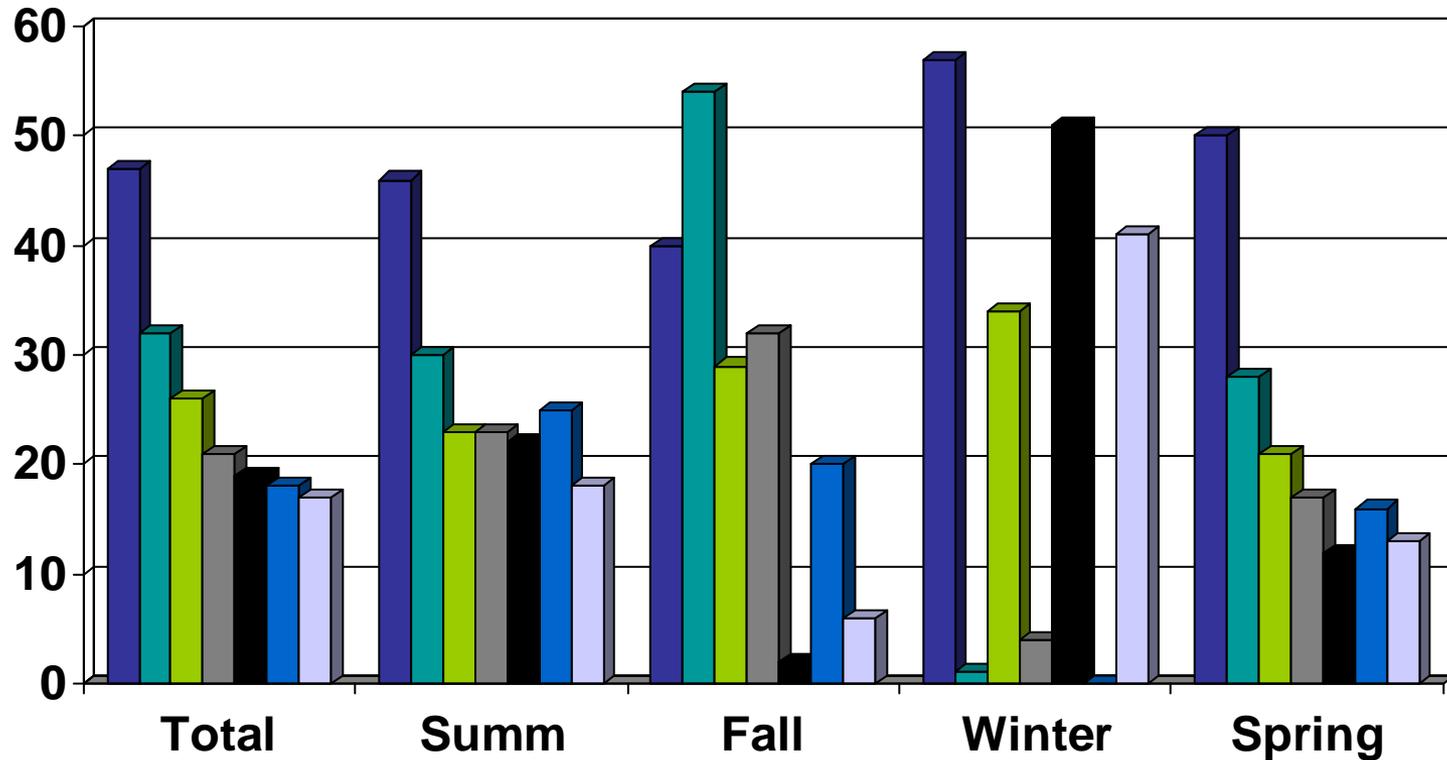
Main Purpose in Mono County



Outdoor Activities in Mono County



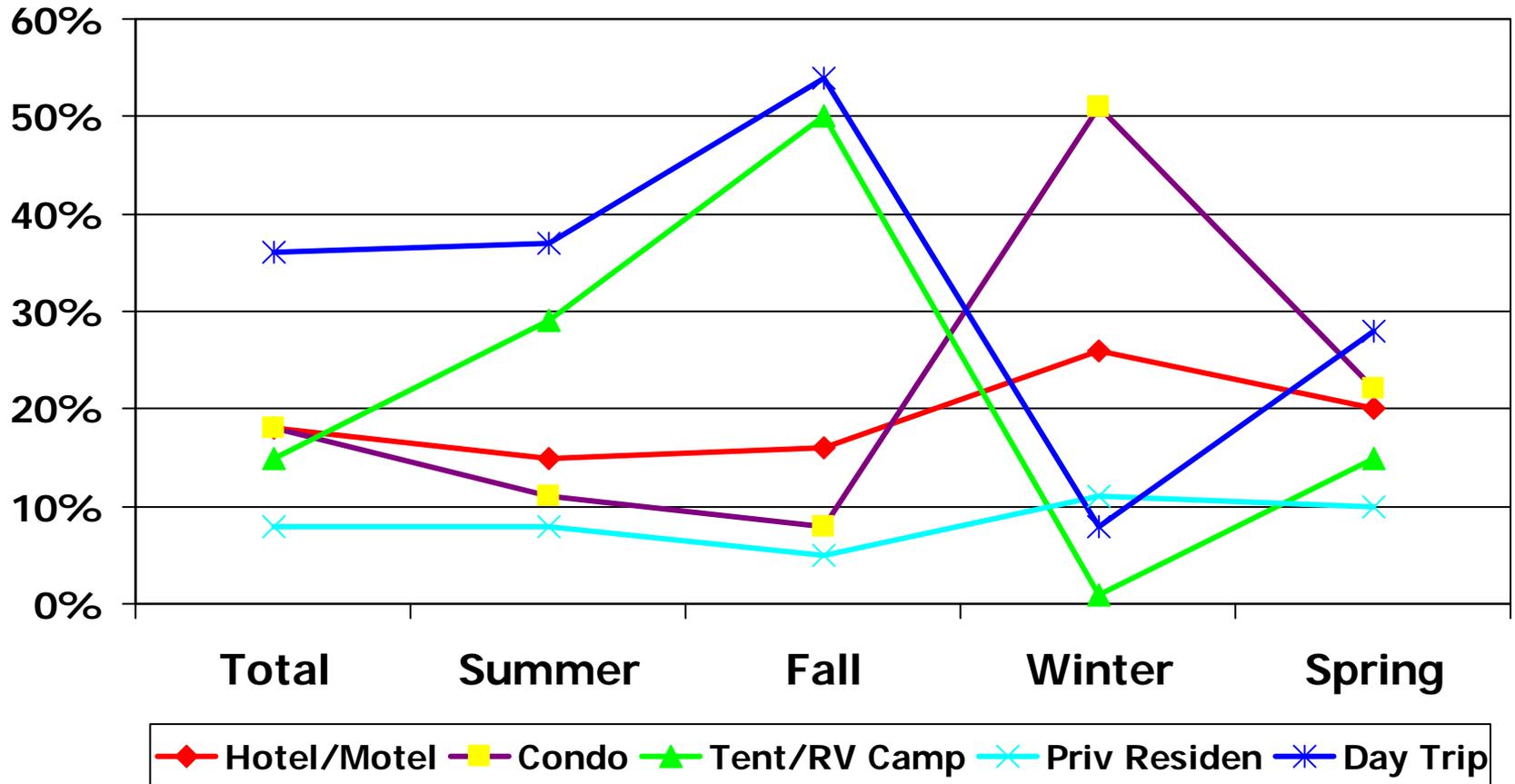
Areas Visited in Mono County



Visitation

- 64% spent at least one night in Mono County on this trip.
- Those who did averaged 3.8 nights.
 - MC Summer visitors stayed 4.5 nights
 - MC Fall visitors stayed 3.3 nights
 - MC Winter visitors stayed 3.8 nights
 - MC Spring visitors stayed 3.8 nights

Visitation by Season



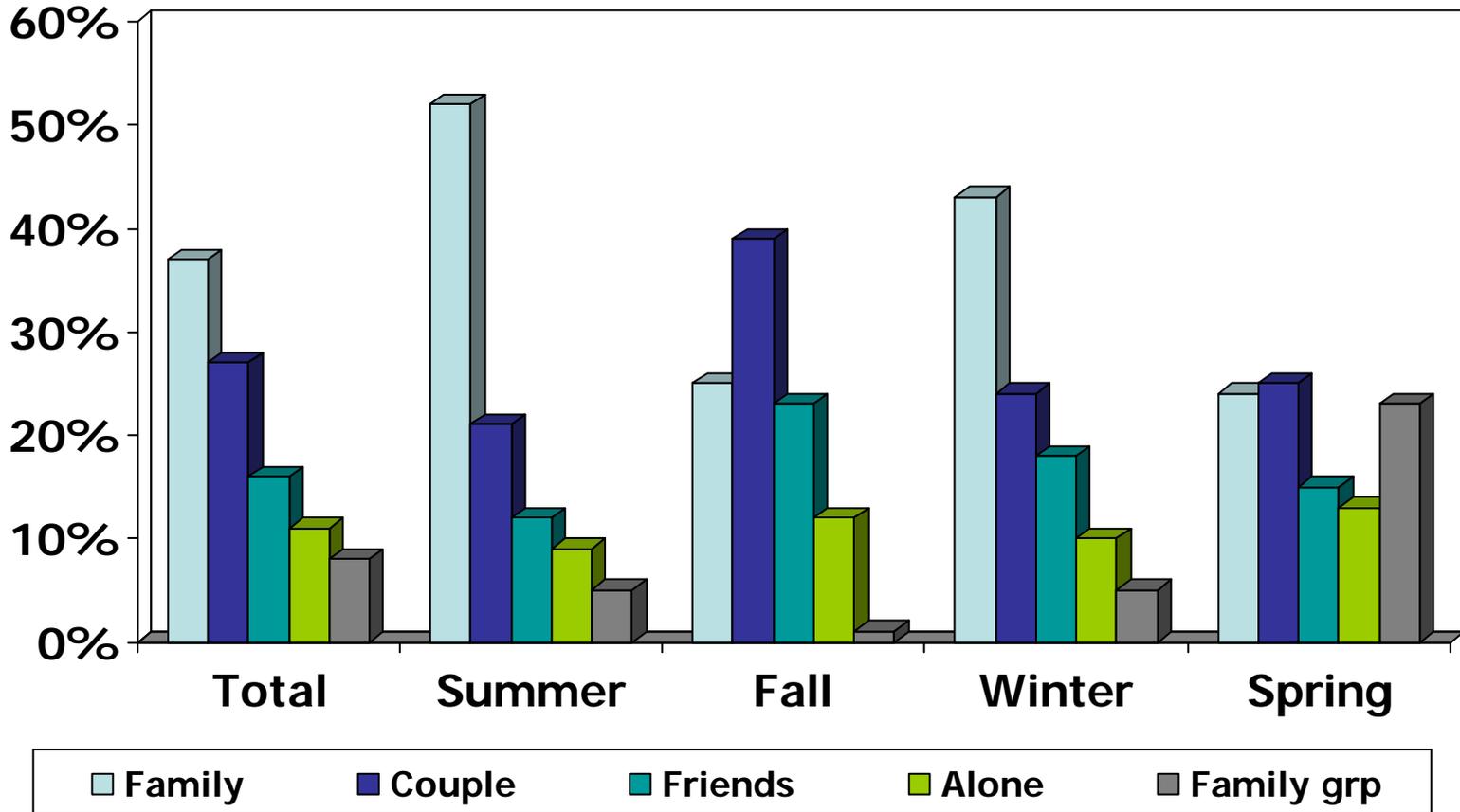
Lodging

- 88% of overnight visitors used PAID lodging
 - 28% stayed in an area hotel or inn
 - 28% stayed in an area condo (paid)
 - 12% camped in tent/campground
 - 12% camped in a RV campground
 - 10.0% rented a cabin
- 12% stayed in a private residence or other unpaid

Lodging Reservations

- Overall, guests reserved 7.5 weeks in advance.
- 24% made no advance reservation
- 26% of lodging guests reserved by Internet
- 24% called their lodging directly or its toll-free reservation number.
- .6% used a general travel or hotel website

Travel Group by Season



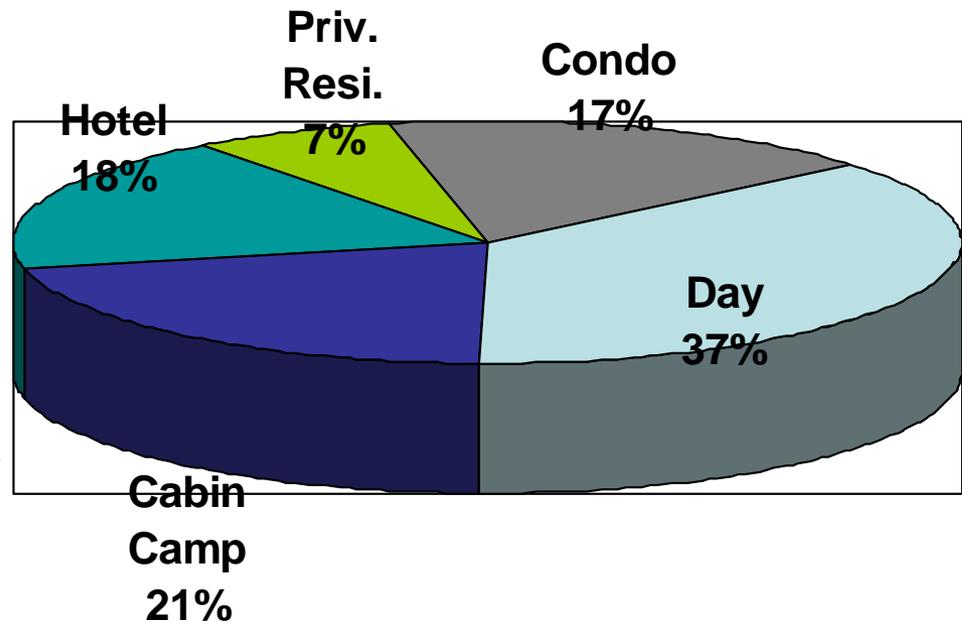
Demographics

- Average age was 48 years
- 69% married/domestic partner
- 26% single adults
- 36% have children at home
- 55% of the respondents were male, 45% female
- household income averaged \$92,600

Economic Impact

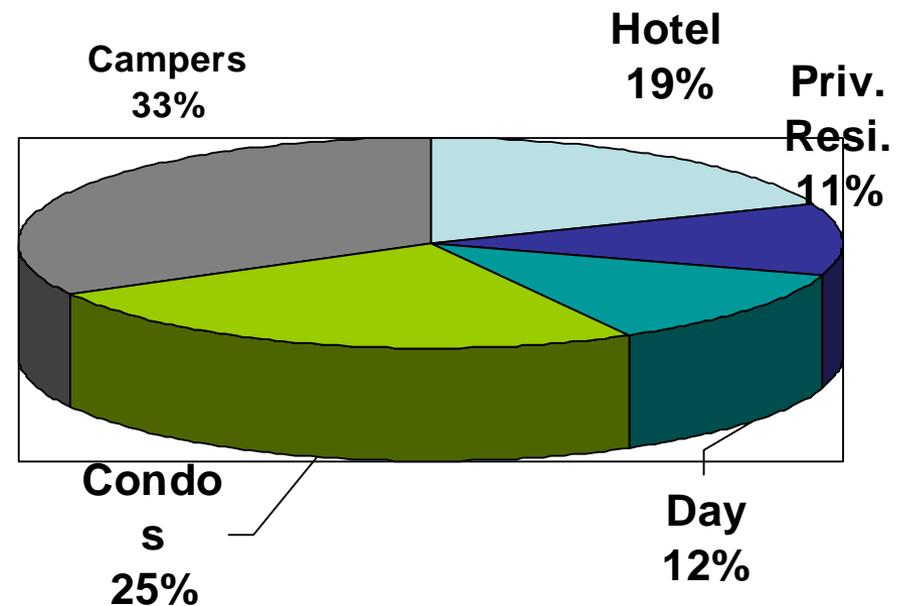
Mono County Visitor Volume by Segment

- **Total 1.5 million** visitors in 2008
 - 36%, or 550,000 were *day visitors*
 - 21% or 321,000 stayed in cabins or camped
 - 18% or 277,000 were in MC hotels
 - 17% or 261,000 rented condos
 - 7% or 107,000 stayed in local *private homes* or *other lodging*



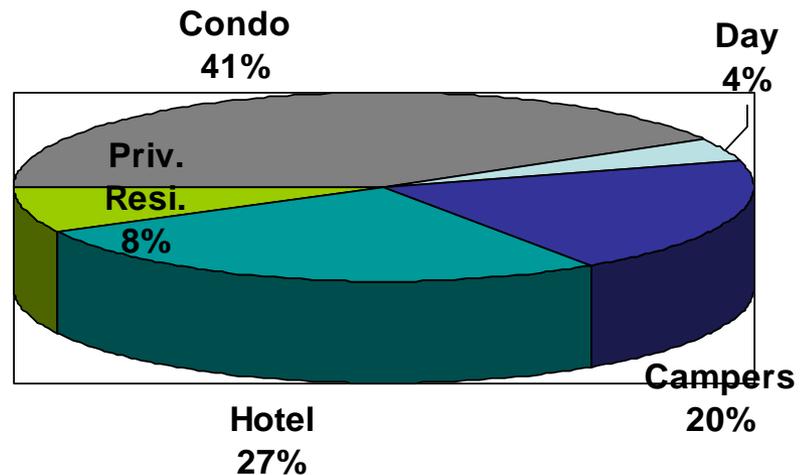
Mono County Visitor Days by Segment

- A measure of total days stayed (2 visitors staying 3 days = 6 visitor days)
- Average 3.1 days per visit
 - Hotel = 3.2 days per visit
 - Home visitors = 4.7 days
 - Condo visitors = 4.6 days
 - Campers = 4.9 days
- 1.5 million total visitors x 3.1 average days = 4.7 million Visitor Days
 - 19% Hotel guests
 - 12% Day visitors
 - 11% in Private homes
 - 25% in Condos
 - 33% Campers



Mono County Visitor Spending by Segment

- Total direct visitor spend of **\$369.5 million**
 - \$153 million spent by condo guests
 - \$99 mill. by hotel guests
 - \$72 mill. by campers
 - \$28 mill. by private residence guests
 - \$16 mill by day trippers



Indirect Spending/Multiplier Effect

- The \$369.5 million direct spending generates next levels of indirect spending from additional goods & services purchased with visitor dollars spent
- 1.4 indirect spending multiplier
 - Accounts for next level of local spending as well as “leakage” (purchases outside the county)
 - Additional indirect spending in Mono County of \$147.8 million
- Total indirect + direct spending = \$517.4 million of total direct impact

Visitor Spending in MC

Category	% Spending	Total Spend
Overall	98%	\$ 79 Avg/person
Lodging (hotel & other paid)	64%	\$118,100,000
Meals/snacks out	78%	\$63,410,000
Transportation (gas, rental)	52%	\$49,900,000
Admissions/recreation activities	37%	\$44,000,000
Shopping/gifts/souvenirs	43%	\$30,800,000
Groceries/incidental items	45%	\$30,200,000
Drinks/beverages	58%	\$16,800,000
Recreation equip./supplies	18%	\$16,200,000

Fiscal/Tax Impacts

- Visitor spending generates tax revenue to Mono County
 - 12% transient occupancy tax on Mono County lodging
 - 13% TOT on Mammoth Lakes Lodging
 - 1% to county of 7.75% (state) of sales tax countywide
- \$267.8 mill. visitor sales taxable (of \$369.5 mill. total)
- Estimated **\$16.6 million** in TO and Retail taxes countywide from visitor spending:
 - \$ 15.1 million, or 91% from lodging
 - \$ 817,000, or 5% from shopping/incidentals/other
 - \$ 683,000 or 4% from meals & beverages

Visitor Supported Employment in Mono County

\$369.5 million direct visitor spending supports an estimated **4,500 jobs**, or 62% of total MC employment base (7,200 in 2008) (Note: many tourism jobs are seasonal & part-time – estimate reflects overall annual average)

- 2,000 or 45% of tourism jobs in lodging food & beverage outlets
 - 1,100 or 24% of jobs in food & beverage outlets
 - 500 or 14% in recreation services/equip./supplies
 - 441 or 5% in transportation related
 - 163 or 3% in retail stores
 - 125 or 3% in food stores/other retail
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- Each **\$66,000** of visitor spending supports one tourism related job in Mono County

MC Hotel/Inn Supply & Demand

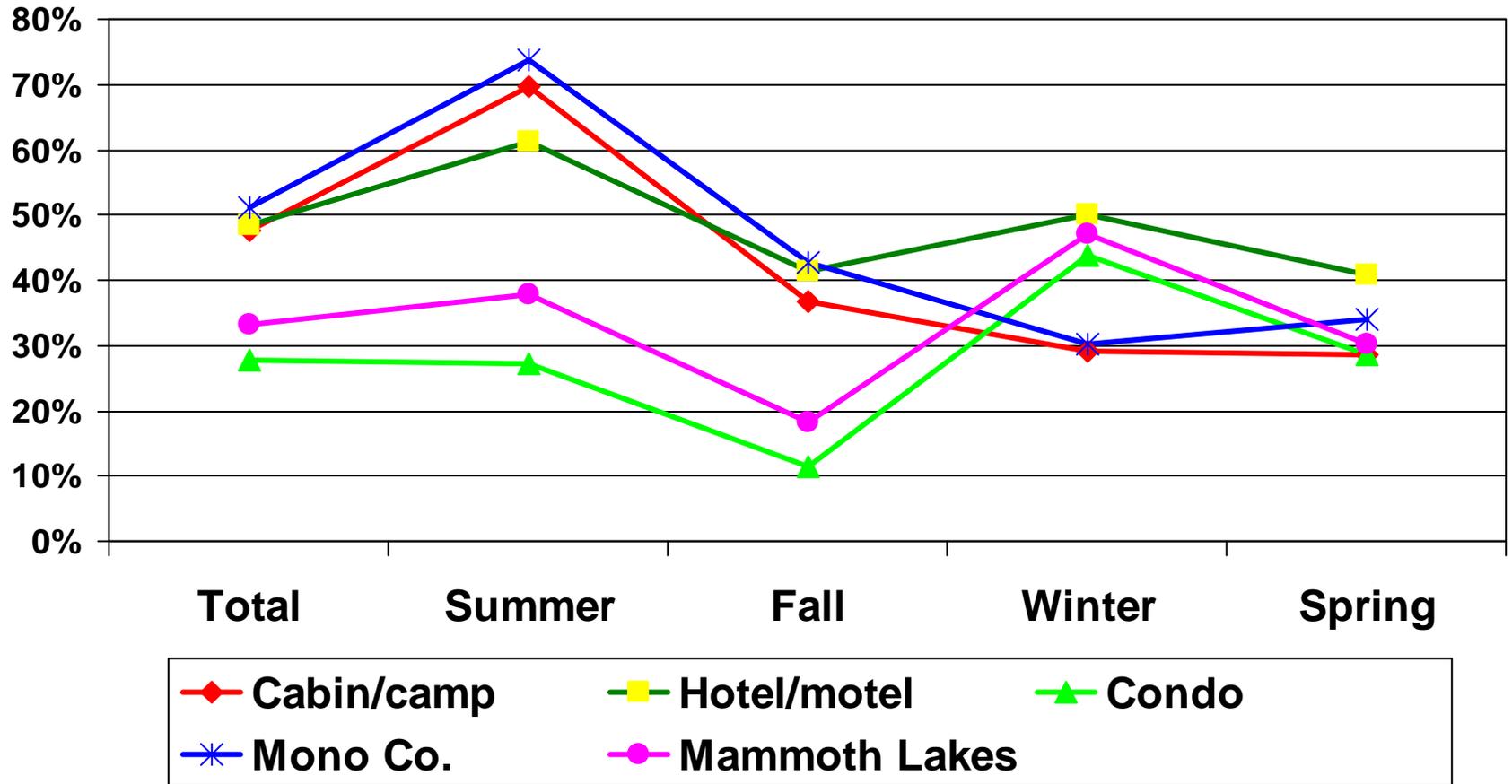
(excludes rentals/condos)

	Total	Condo	Hotel/ Motel	Camp- grounds
Supply				
# Properties	132	29	44	59
Units - Daily	8,632	3,039	1,722	3,871
Units - Annual	2,578,668	1,112,150	587,324	879,194
% of Supply	100%	43.1%	22.8%	34.1%
Demand				
Occpd. Units	1,010,504	308,429	283,893	418,182
Occpy. Rate	39.2%	27.7%	48.3%	47.6%

Occupancy Rates by Season

	Total	Summer	Fall	Winter	Spring
Cabin/camp	47.6%	69.7%	36.7%	29.2%	28.6%
Hotel/motel	48.3%	61.3%	41.45	50.2%	40.8%
Condo	27.7%	27.2%	11.3%	43.9%	28.6%
Mono Co.	51.1%	73.8%	42.7%	30.1%	33.9%
Mammoth Lakes	33.2%	37.9%	18.2%	47.1%	30.1%

Occupancy Rates by Season



Conclusions

Mono County's tourism industry is vibrant:

- 1.5 million annual visitors; 4.7 mill. visitor days
- Contribute \$369.5 million of direct spending to local economy; \$517 million with 1.4 multiplier
- Generate \$16.6 million in TO & Retail Sales tax countywide
- Support 4,500 jobs, or 62% of the countywide workforce

- Most visitors: from California; 11% international
- Two-thirds, 64% stay overnight in Mono County,
- 88% stayed in PAID lodging:
 - 28% stayed in a local hotel or inn
 - 28% stayed in a condo
 - 22% stayed in a campground/RV/cabin
- Very High Satisfaction esp. for scenic beauty & activities

Challenges/Opportunities

- Spring & Fall shoulders, weaker than Summer & Winter, offer unique marketing opportunities to build on:
 - existing demand for fishing & other activities in spring
 - Exploring and sightseeing Fall colors
- Each season has unique segments to target marketing

Challenges/Opportunities

- Strong overnight visitation but low paying accommodations esp. in Mono Co areas.

Identify opportunity for:

- Ways to move a share into higher paying lodging
- Higher level lodging in MC areas (outside Mammoth)

Challenges/Opportunities

- Relatively low use of retail & low spending per person (tho some is for recreation fees/equip/ supplies).
- Identify areas (geog & type) where retail can be developed. Consider products made in & unique to the area.

Challenges/Opportunities

- 2/3 of MC visitors are repeat, good reflection of high satisfaction.
- Conversely, room for increasing % of new visitors to expand total visitor base.
- Opportunity by marketing in adjacent Oregon, Nevada, perhaps Arizona

Challenges/Opportunities

- Relatively high visitor age, 48+ avg. area captures a strong share of 18-29 youth.
- They are destination's future as boomers age.
- Consider more marketing, programs & activities to this segment esp. in off-peak periods (most do not have children).
- Consider “cool” “hip” media positioning of the destination

Thank You !



Questions? Discussion?