

# **DESTINATION RESORT COMMUNITY AND ECONOMIC DEVELOPMENT STRATEGY**

**TOWN OF MAMMOTH LAKES**

**Adopted April 15, 2009**

This Destination Resort Community and Economic Development Strategy is a 3-year strategic and operational plan intended to clearly establish a short-term direction for the community and dedicate the resources to achieve them.

## **Our Strategic Planning Process**

In August 2007 the Town Council adopted the 2007 General Plan. A major theme woven through out the Plan is the importance of strengthening the community's economy and position as a destination resort. The need for an overall community and economic development strategy was obvious.

During 2007 and continuing through 2008, the Town commissioned various reports and held a series of community meetings to address this need. In January 2008, these reports along with case studies of economic development efforts of other communities, professional publications, other background documents and policy recommendations were completed and assembled as a study document produced in book form.

The study document was presented to the Town Council and Town Commissions, and in February 2008, a ten-member "Destination Resort Steering Committee" (DRSC) was formed consisting of Airport, Mobility, Planning, Public Arts, and Tourism and Recreation Commission members, and community representatives, to review the study document. The DRSC's purpose was to:

- Identify what's important to Mammoth today and for our future,
- Engage the community with focused ideas and recommendations, and
- Chart a course to create a community-based economic development strategy.

In addition, the Town conducted a series of "cafes" to gather broad community perspectives and opinions about issues affecting the community. The "Old Mammoth Road," "North Village," "Play," "Mobility," "Global Warming," "General Plan Implementation," and "It's Your Business" cafes have all evoked a strong and overlapping concern about Mammoth Lakes' economic health and sustainability, and demonstrated community interest and need for public involvement in creating a strategic community and economic development strategy.

In June 2008, a local "Economic Roundtable" panel discussion was held about national, regional and local economic issues; focusing on what the community can do for itself to ensure long-term success. Steve Frisch of the Sierra Business Council facilitated the

Saturday morning roundtable and about 30 people participated in small group conversations held around four subject areas:

- Business to Business/Restaurant, Retail and Services/Professional,
- “The Mammoth Experience”/Marketing and Promotion,
- Lodging, Real Estate, and Construction, and
- Events and Activities Programming and Place-making.

The DRSC used information gained from this extensive community engagement process, commissioned reports, and evaluation of best practices to create the Community and Economic Development Strategy which provides a more highly prioritized road map to achieve General Plan vision, goals, and actions related to economic development.

The DRSC recommended the Town focus on a limited number of high-level initiatives. They were: 1. Tourism - filling beds during mid-week and shoulder seasons, 2. Destination Resort – place-making and securing guest venues and facilities, 3. Feet First – mobility improvements, 4. Recreation – planning and building trails and recreation facilities, 5. Sustainability – conserving our natural resources, 6. Air Service – providing commercial air service, 7. Economic Development – assisting all of our local businesses, and 8. Organizational Effectiveness and Community Engagement – a market focused government.

This Destination Resort Community and Economic Development Strategy is the culmination of these efforts.

## Our Strengths and Challenges

Mammoth’s economy is almost wholly dependent on tourism. Virtually every aspect of the community is directly or indirectly linked to tourism - trails, natural resources, branding and town identity, conference facilities, transportation; so too are local businesses – dining, food, clothing, gear, ticket sales, and other services.

### Strengths

Strengths of our tourism-based economy are:

- Our incredible natural setting and abundant outdoor recreational activities.
- Our climate, 300 days of sun and 400 inches of snow each year.
- Mammoth's proximity to the Los Angeles market has made us their playground. Southern Californian’s comprise the majority of Mammoth's visitors and second homeowners, and are a major, consistent source of revenues.
- Mammoth has been attractive to large developers such as Intrawest and Starwood that has resulted in major investments in higher-end lodging.
- Mammoth Mountain Ski Area itself is renowned for its size and tremendous variety of terrain for all skill levels and continues to improve on-mountain skiing and snowboarding facilities to attract new visitors.
- Our close proximity to world renowned parks and forests like Yosemite National Park.

- Mammoth's isolation, which is in some ways a disadvantage, results in one of its greatest strengths: no sprawl is possible. Mammoth will always be an island of civilization surrounded by unique, spectacular public lands.

### **Challenges**

Our tourism based economy is affected and threatened by:

- Environmental Factors: 1980 Long Valley Earthquake, 1980-90's volcanism, 1992 Rainbow Fire, 1991 & 2007 Low Snowfall, New Zealand Mud Snail & Quagga Mussels, Global Climate Change and Extreme Sierra Weather Patterns.
- Economic Factors: 1994 Highway 14 closed due to Northridge Earthquake, Strong Resort Industry Competition, Aging Baby Boomers, National/Global Economic Downturn, Escalating and Fluctuating Fuel Costs.
- Local Factors: Weak Spring and Fall Visitation.
- Competition: alternative recreational choices and alternatives resorts to choose from.

Mammoth's businesses experience feast or famine:

- Low average annual lodging occupancies.
- Shoulder season visitors find closed restaurants, shops, services and limited recreation choices.
- Customer service standards suffer.
- Employees work too much or not at all.
- High employee burnout.
- Difficult to attract and retain employees and achieve a sustainable employment base due to the cost of living, high housing costs, and a lack of resident amenities.

Economic diversification is difficult:

- We are geographically isolated, access is limited.
- Marketing and distribution networks are limited.
- Materials, shipping, and construction and development costs are high.
- Local costs of doing business are relatively higher than other communities.
- The Town is very limited in size and surrounded by public lands.
- Winters can be severe and energy costs can be high.

## **Our 3-Year Strategic & Operational Plan**

This Destination Resort Community and Economic Development Strategy includes the ideas of partnership, people, place and positioning. The Plan is intended to improve our overall quality of life: increase opportunity, spur investment, encourage local enterprise, serve the needs of local residents, workers and businesses, promote stable employment, reduce poverty, offer family and neighborhood life, maintain our natural environment, conserve natural resources and be both inclusive and sustainable.

This strategy looks to leverage assets to support increased competitiveness and economic growth. Ultimately, both the community and the ski area require progressive changes to become a destination resort. To achieve these goals, the Town should direct resources to

the following high priority short- and mid-term strategies and objectives during this 3-year operational period (2008/2009 through 2010/2011 fiscal years).

### **Key Result Area (KRA) 1.0 Achieve Economic and Fiscal Stability**

**Disciplines: We will base our decisions on achieving the triple bottom line: one that considers economic development, land use planning, mobility, community design and place-making to achieve a thriving local economy.**

**We will prioritize the allocation of resources and decision-making to provide activities, programs, services, and facilities that lead to higher visitation first.**

**We will partner with the private sector and fellow public agencies to leverage visitor serving activities, programs, services, and facilities with new development.**

**We will build partnerships with members of our community to increase opportunity, spur investment, encourage local enterprises, and serve the needs of local residents, workers and businesses.**

Goal 1.1 Annually increase Town visitation and occupancy rates.

Goal 1.2 Stabilize and strengthen local businesses.

Goal 1.3 Annually increase municipal revenues and their reliability.

#### **Air Service**

Strategy 1.1.1 Provide commercial regional air service to increase accessibility from key visitor market areas.

Objective 1.1A Achieve 20,000 enplanements per year by increasing winter air service, developing year-round air service, and providing continued service and facility improvements that will support commercial air service.

#### **Mobility**

Strategy 1.1.2 Shift the primary means of access and circulation from auto use to walking, bicycling, transportation demand management, gondolas, and transit to improve the Town's overall quality of life, reduce impacts of development and provide better emergency access.

Objective 1.2A Complete the Mobility Plan by March 2010.

Objective 1.2B By June 2010 develop a mobility facilities improvement and financing program to ensure implementation of planned infrastructure.

Objective 1.2C By July 2011 complete a town-wide parking improvement and financing plan.

Objective 1.2D Complete a town-wide wayfinding and signage system plan by April 2010. The first phase will be a demonstration trails signage and wayfinding system in place by July 2009.

### **Visitor Driving Activities, Programs, Services & Facilities**

Strategy 1.1.3 Partner with the private sector to provide a variety and range of meeting and conference spaces, indoor and outdoor event venues and recreational facilities with new development that can be programmed to drive increased visitation.

Objective 1.3A Develop a variety of meeting and conference spaces ranging from 2,000 to 5,000 square feet, 7,000 to 10,000 square feet, and 15,000 square feet with future hotel development in general and in the North Village, Town Center and Main Street districts.

Objective 1.3B Develop a variety and range of indoor and outdoor event venues with future hotel development in general and in Mammoth Creek Park, North Village, Town Center and Main Street districts that target: a 45,000 square foot indoor events facility with a 2-3 acre joint sports field and events area, a 100-seat indoor town hall/ meeting/performance facility, and three to five smaller outdoor events areas and plazas.

Objective 1.3C Complete the environmental review of the Parks and Recreation and Trail System Master Plans by December 2009. Adopt the two plans by March 2010.

Objective 1.3D By June 2010, develop a strategic implementation plan that addresses facilities improvement and identifies financing programs for the Parks and Recreation and Trail System Master Plans to begin implementation of planned infrastructure.

Objective 1.3E Complete design specifications to establish uniform standards for resort animation: decorative banners, tree lighting, information kiosks, graphics, wayfinding and accoutrements that create an attractive festive resort appearance by July 2010.

### **Place-Making**

Strategy 1.1.4 Ensure that the North Village effectively functions as our “Visitor Oriented Entertainment Retail District.”

Objective 1.4A By June 2010 complete revisions to the North Village Specific Plan to specify the critical mix and mass of uses; anchor retail, resort services and entertainment uses; meeting, event, and performance venues; and mobility and infrastructure improvements to be provided with new development.

Objective 1.4B By June 2010 develop a facilities improvement and financing program for the North Village to ensure implementation of planned infrastructure.

Strategy 1.1.5 Establish the “Town Center” on north Old Mammoth Road that will function as a locals- and visitor-oriented mixed-use district.

Objective 1.5A By December 2009 codify the North Old Mammoth Road District Study.

Objective 1.5B By July 2010 complete a Town Center Specific Plan to specify the critical mix and mass of uses; anchor retail and entertainment uses; meeting, event, and performance venues; and mobility and infrastructure improvements to be provided with new development.

Objective 1.5C By July 2010 develop a facilities improvement and financing program for the Town Center to ensure implementation of planned infrastructure.

Objective 1.5D Complete a disposition and development plan for the Civic Center parcel to serve the community by providing public parking, events venues and joint town hall meeting/performance facility with a mix of uses by June 2011.

Strategy 1.1.6 Establish “Main Street” as a connected mixed-use residential, commercial, and lodging corridor, and an attractive Town entrance.

Objective 1.6A By December 2009 complete a Main Street district study.

Objective 1.6B By July 2010, complete a Main Street Specific Plan to specify the design and configuration of Main Street, the disposition of surplus right-of-way, a gondola system connecting to the North Village, mobility and infrastructure improvements, land uses, and design and development standards.

Objective 1.6C By June 2010 complete a feasibility study for establishing a redevelopment project area for the Main Street and surrounding areas.

Objective 1.6D By June 2010 develop a facilities improvement and financing program for Main Street district to ensure implementation of planned infrastructure.

Strategy 1.1.7 Create a visitor- and community-serving cultural, entertainment and recreation hub, at Mammoth Creek Park, Hayden Cabin, and Sherwin Meadows area.

Objective 1.7A By June 2010, complete the Mammoth Creek Park Specific Plan to specify the recreational uses and facilities including and indoor events facility with joint sports field/outdoor events area, family lawn and picnic areas, play area and equipment, and mobility and infrastructure improvements to be provided with new development.

Objective 1.7B By June 2010, develop a strategic implementation plan for the facilities improvement and identify financing programs for the Mammoth Creek Park to ensure implementation of planned infrastructure.

### **Prepare for Reinvestment**

Strategy 1.1.8 Adopt policies and zoning ordinances to streamline the permit process and to achieve community expectations and standards.

Objective 1.8A Complete the Build Out Monitoring and Population At One Time Model by March 2009.

Objective 1.8B Adopt the hotel – condominium zoning ordinance by July 2009.

Objective 1.8C Adopt the community benefit / incentive zoning ordinance by July 2009.

Objective 1.8D Complete district planning studies and develop a single integrated community concept plan by December 2009.

Objective 1.8E Complete the General Plan Housing Element update by August 2009.

Objective 1.8F Complete the Mammoth Lakes Housing workforce housing strategy by July 2009.

Objective 1.8G By December 2010 complete a comprehensive Municipal Code update consistent with the General Plan and that codifies master plans and district studies.

### **Natural Resources**

Strategy 1.1.9 Protect the area's natural resources, scenic beauty and character recognizing that these environmental attributes are also primary tourist attractions.

Objective 1.9A Complete the Impact Mitigation and Resource Conservation framework and green technology policies and standards by June 2009.

Objective 1.9B Complete resource conservation and green technologies policies and standards, complementing the relevant standards of the State Green Building Code, by September 2010. Promote the Town's leadership efforts in this field.

Objective 1.9C By June 2010, complete a framework for materials and solid waste conservation, recycling, and reuse policies and standards by June 2010.

## **Marketing & Promotion**

Strategy 1.1.10 Create a “Destination Marketing Organization “ (DMO) to engage the local tourism industry in efforts to leverage and improve the effectiveness of external sales, marketing, and promotional efforts by adopting the model used in most destinations.

Objective 1.10A      Involve at least 10 percent of our local businesses in formulating the purpose for the operations of the DMO, complete by June 2009.

Objective 1.10B      Secure public sector funding for DMO operations in the Town Fiscal Year 2009-2010 budget.

Objective 1.10C      Form an operational DMO by December 2009. Secure private sector funding for the DMO as part of formation process.

Objective 1.10D      By December 2010, at least 80 percent of businesses provide an evaluation of the DMO’s performance with desire to have services rated as satisfactory or better.

Objective 1.10E      By June 2009 release the master annual sales and marketing plan that includes performance objectives and measures.

Objective 1.10F      Establish and fund a community-based annual hospitality and customer service-training program by December 2009.

Objective 1.10G      Implement targeted marketing programs for three new niche and emerging markets by December 2009.

## **Special Events & Cultural Arts**

Strategy 1.1.11 Provide a broad range of cultural and artistic opportunities by encouraging and sponsoring concerts, performances, visual art exhibits, festivals, and sporting, educational and civic events in the community.

Objective 1.11A      By December 2009, develop a cooperative marketing campaign for arts and cultural events with metrics for effectiveness.

Objective 1.11B      Hold two new visitor-attracting events in 2010.

Objective 1.11C      Complete a community-based art and culture plan by September 2010.

## **Business Assistance, Diversification & Retention**

Strategy 1.1.12      Assist local businesses in order to increase business revenues and receipts, increase business and employment diversity, capture more sales locally and reduce leakage.

Objective 1.12A Benchmark local economic performance and report quarterly performance by December 2009.

Objective 1.12B During Fiscal Year 2009-2010, conduct one visit each week with a local business to learn about conditions, concerns, and issues to find ways to improve them.

Objective 1.12C Hold quarterly business forums with local business clusters (e.g. construction, design and development; restaurant, retail and services; and lodging and real estate) to address businesses issues and resolve them. Involve at least 10 percent of our local businesses in quarterly forums.

Objective 1.12D Assemble local resource and service providers (e.g. the Sierra Business Council, Cerro Coso Community College, foundations, Town, County, State, and Federal agencies) to establish technical and financial assistance that can help small businesses. Complete by July 2010.

Objective 1.12E Establish a business resource center to provide a clearinghouse of business information and assistance by July 2010.

Objective 1.12F By December 2009 complete a guide/map to local businesses; public/private information, resources and services; and a “welcome kit” for businesses, residents and visitors.

Objective 1.12G By July 2011 develop a new businesses attraction program.

### **Market Focused Government**

Strategy 1.1.13 Maintain an effective organization, provide higher customer service, and engage the community in all of the Town’s major efforts.

Objective 1.13A Dedicate staff resources in each Fiscal Year Budget to maintain a safe and attractive community through code compliance and community outreach programs.

Objective 1.13B Conduct an annual audit to identify and eliminate unnecessary, overlapping and contradictory regulations and to ensure that fees and levies imposed on new and expanding businesses are fair and broad based.

Objective 1.13C Continue to streamline and expedite the development approval process to reduce unnecessary delay and costs.

Objective 1.13D By July 2010 complete a survey of competitive resort communities to benchmark municipal revenues, services costs, and fees. Keep local service costs and fees competitive with them.

Objective 1.13E By July 2010 specify indicators to measure the financial health of the Town.

Objective 1.13F Overhaul the Town's web site to be the first and best source for local government information and services by July 2010.

Objective 1.13G Seek and secure new funding sources for priority activities, programs, services, and facilities.

Objective 1.13H Adopt Fiscal Year 2009-2010 budget polices that place a high priority on providing visitor driving recreation activities, programs, services, and facilities.

Objective 1.13I Adopt comprehensive budget policies for service contracts, cultural arts and special events, and business assistance loans and grants in the 2010-2011 Fiscal Year budget.

Objective 1.13J Begin an annual community survey to identify citizen satisfaction with the range, quality and cost of Town services by December 2010.

Objective 1.13K By 2010, at least 80 percent of businesses rate the Town performance in providing services as satisfactory or better.

Objective 1.13M Dedicate resources in each Fiscal Year Budget to maintain a well trained staff in new trends affecting public services, such as resource conservation and green technologies.

The following sections of this document provide contributing and supporting information.

## Our Organizational and Community Profile

The Town of Mammoth Lakes is a General Law city incorporated in 1984. The Town has a council/manager form of government, with a five-member Town Council elected at large. The Mayor is selected by the Council from among its members, and serves a one-year term. The Town Manager, appointed by the Council, is the chief administrative officer carrying out the policies of the Council and directing a municipal organization of approximately 114 full and part-time employees. The Town's annual operating budget is approximately \$18.5 million.

Mammoth Lakes is the only incorporated municipality, and the center of population, development, and visitation, in the County of Mono. It's the largest community in the Tri-County area, consisting of Inyo, Mono and Alpine Counties. Because of the high level of visitation and associated employment of those who commute into town for work, the Town serves a population far greater than its permanent residents. Mammoth is an "island," bounded on all sides by the Inyo National Forest and other publicly owned lands. With a mere four square miles available for development, the character, quality, and function of the community and new development is very important.

### **Primary Products and Services**

*Traditional Government Services* - including services that are normally expected from a municipal government, such as:

- Trash pick-up and removal (via franchise agreement)
- Maintenance of streets and drainage systems
- Snow removal
- Parks and recreation facilities and programming
- Public Transportation, via participation in Eastern Sierra Transit Authority
- Workforce Housing, via funding of Mammoth Lakes Housing

*Non-Traditional Government Services* - in light of the community's role as a resort/vacation area:

- Marketing and promotion
- Support/coordination for visitor-oriented special events

*Regulatory/Enforcement* - including services to protect the general public interest, such as:

- Police
- Animal control
- Building plans examination and permitting
- Code enforcement
- Land use permitting

*Management/Administrative Services* - including a wide range of centralized support services to internal users:

- Airport services

- Engineering
- Facilities maintenance
- Financial management
- Fleet maintenance
- Information systems
- Human resource management
- Legal support
- Risk management
- Council and Advisory Commission support

**Services Provided by Other Agencies/Entities:**

- Education-Mammoth Unified School District, Mono County Office of Education, and Cerro Coso Community College District
- Electrical utilities—Southern California Edison
- Fire—Mammoth Lakes Fire Protection District
- Medical-Mammoth Lakes Hospital District
- Natural gas—Turner Propane (Heritage) and Amerigas
- Public lands-United States Forest Service and National Park Service
- Water and sewer—Mammoth Community Water District

**Delivery Mechanisms:**

Town services are delivered directly to customers through six operational departments and administration. A non-profit (Mammoth Lakes Housing) and a Joint Powers Authority (Eastern Sierra Transit Authority), in partnership with the Town, provide workforce housing and transit services, respectively.

**Key Customers and Stakeholders**

KEY CUSTOMERS

Local residents  
 Visitors  
 Second homeowners  
 Businesses  
 Special interest and advocacy groups  
 Community agencies  
 Development and construction community  
 Special districts  
 Property owners  
 Schools

KEY STAKEHOLDERS

Town Council  
 Mono County Agencies  
 State Agencies  
 Federal agencies  
 Advisory Commissions  
 Employees  
 Grant providers

## **Current and Future Requirements and Expectations**

The Town's key customers and stakeholders generally require or expect the following:

- Affordable taxes and fees for service
- Service quality and quantity sufficient to maintain a high quality of life
- Timely and efficient delivery of services
- A stable, financially secure local government able to effectively deal with emerging requirements
- A local government compliant with state and federal mandates, regulations, and rules
- A community that provides good and improving economic opportunity for everyone
- Accessibility; a convenient means of requesting service or filing a complaint
- Civic engagement and transparency in decision making

## **Challenges Facing Municipal Government and the Town of Mammoth Lakes**

With these service expectations in mind, the Town is facing increasingly difficult challenges in terms of fiscal resources. In addition, broader trends in our national and state economies and politics affect the types and complexity of services the Town provides.

The *National League of Cities* and the *National Association of Counties* identified several recent trends in local government that will likely affect the way communities operate. Anticipation of how these trends will affect our community is an important factor in determining the overall strategies. Key trends include the following:

***Changing demographics*** – The ethnic composition of communities, especially in metropolitan areas, continues to evolve, creating a growing need for multi-lingual and cultural services. As 77 million baby boomers age and begin retiring, the community will need to consider issues such as changing recreational preferences, succession planning and knowledge retention, and health and retirement. Conversely, the technology generation will continue to expand, reducing the digital divide between generations.

***Climate change and sustainability*** – California is at the forefront of the worldwide effort to tackle the causes - and consequences - of climate change. The State has set ambitious goals to reduce emissions of carbon dioxide and other greenhouse gases to 1990 levels by 2020, and to 80 percent below 1990 levels by 2050. Strong State goals require effective local action and California communities will be asked to play a leadership role both to reduce greenhouse gas emissions and to prepare for the consequences of climate change. Legislative initiatives such as, AB 32 - California Global Warming Solutions Act of 2006; SB 375 - Regional Transportation Planning, Housing, CEQA and Global Warming Emission Reduction Measure; the California Green Building Standards Code; as well as changing CEQA requirements - CA Attorney vs. County of San Bernardino and SB 97, will impact local government, planning, and the regulatory environment.

***Fiscal stewardship and economic shifts*** – Economic conditions have placed pressure on some federal and state governments, shifting the provision of additional services, often without increased funding or resources, to county and municipal government. Current trends foreshadow a continued economic slowdown and a recession that will place additional strain on local government.

***Economic growth and vitality*** – To address quality of life issues, communities are beginning to address ways to improve economic vitality through growth in business and employment, which has been a challenge given the continuing gap between local revenues and expenditures.

***Healthy and livable communities*** – Nationwide increases in childhood and adult obesity and associated health risks such as diabetes, heart disease, high blood pressure and cancer, have led to changes in how communities and neighborhoods are planned and built. Attention is now focused on providing safe and healthy lifestyle options like planning for walking and biking accessibility to work, school, recreation and shopping destinations; building trails, parks and playgrounds that encourage daily exercise; and building affordable and accessible in-town housing.

***Civic engagement, trust and governance*** – Trust between local officials and citizens have recently been tested because of disengagement at the national and global levels. As a result, there is a growing emphasis on community participation in governmental policy making and local governance.

***Performance management and measurement*** – Much like businesses, local governments are facing an increasing need to measure performance and demonstrate results using key indicators and metrics. Measurement can apply to municipal conditions within the community (e.g. physical, environmental, economic, social, etc.).

***Convergence and performance*** – An active movement towards improving processes have turned communities towards centralization and consolidation of existing systems in order to reduce operating costs. Communities will also benefit from technologies that have become more powerful, but have remained cost-effective.

***E-Government*** – Communities are utilizing more online services to provide citizens with increased information, greater civic involvement, and improved municipal services. Portals are also being used internally to share information throughout the organization and promote collaboration.

***Security*** – Communities must incorporate a full, secure, and reliable network and telecommunications infrastructure with physical security protection. Identity management and content security to prevent spam, worms and viruses are two major focal points. Additionally, the increase in online services provided to the public will require technology to avert identity theft and credit card fraud. The threat of terrorism has forced communities to enhance local public safety efforts. Federal agencies have also gradually been increasing funding for homeland security initiatives at both the state and local levels.

***Disaster preparedness and recovery*** – The need for planning to mitigate the effect of man-made or natural disasters has become an imperative. Communities are implementing various tools and procedures such as replication software and mirrored sites to minimize downtime in an attempt to restore systems and bring them back online.

## Community Profile

This is the current “snapshot” of population, housing and employment in Mammoth Lakes and Mono County.

### 2008 Quick Statistics

Town of Mammoth Lakes Population (2008)	7,413
Mono County Population (2008)	13,759
Mammoth Lakes Percentage of County Population (2008)	53.9%
Mammoth Lakes Housing Units (2000)	7,960
Mammoth Lakes Housing Units: (2008 estimated)	9,235
Mono County Housing Units (2008)	13,691
Mono County Median Income (2006)	\$65,900
Mammoth Lakes Unemployment Rate (2008)	6.0 % (Jan.-Aug. average)

Source: State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State, 2001-2008, with 2000 Benchmark. Sacramento, California, May 2008; Department of Housing and Urban Development, 2008. Census 2000

### Mono County Demographic Profile (2005 estimated)

Age	Number	Percentage of Total
Under 18	3,366	25.0%
18-34	2,886	21.5%
35-55	4,449	33.1%
55 and Older	2,735	20.4%

Race	Number	Percentage of Total
White	9,814	73.0%
African-American	106	0.8%
Hispanic, Any Race	3,094	23.0%
Other	434	3.2%

Gender	Number	Percentage of Total
Male	7,320	54.1%
Female	6,212	45.9%

Source: UCSB Economic Forecast for Mammoth Lakes, June 2006

### Mammoth Lakes Housing Profile (2000)

	Number	Percentage of Total
Total Housing Units	7,960	100
Vacant/Seasonal Housing Units	5,146	64.6%
Occupied Housing Units	2,814	35.4%
<i>Renter-Occupied</i>	<i>1,329</i>	<i>33.8%</i>
<i>Owner-Occupied</i>	<i>1,485</i>	<i>66.2%</i>

Source: U.S. Census 2000

	Number	Percentage of Total
Total Housing Units	7,960	100%
Single Family (Attached and Detached)	3,087	38.8%
Duplex, Triplex and Fourplex	1,540	19.4%
5 to 19 Units	1,918	24.1%
20 Units or More	1,220	15.3%
Mobile Homes	183	2.3%
Other (RV, van, etc.)	10	0.1%

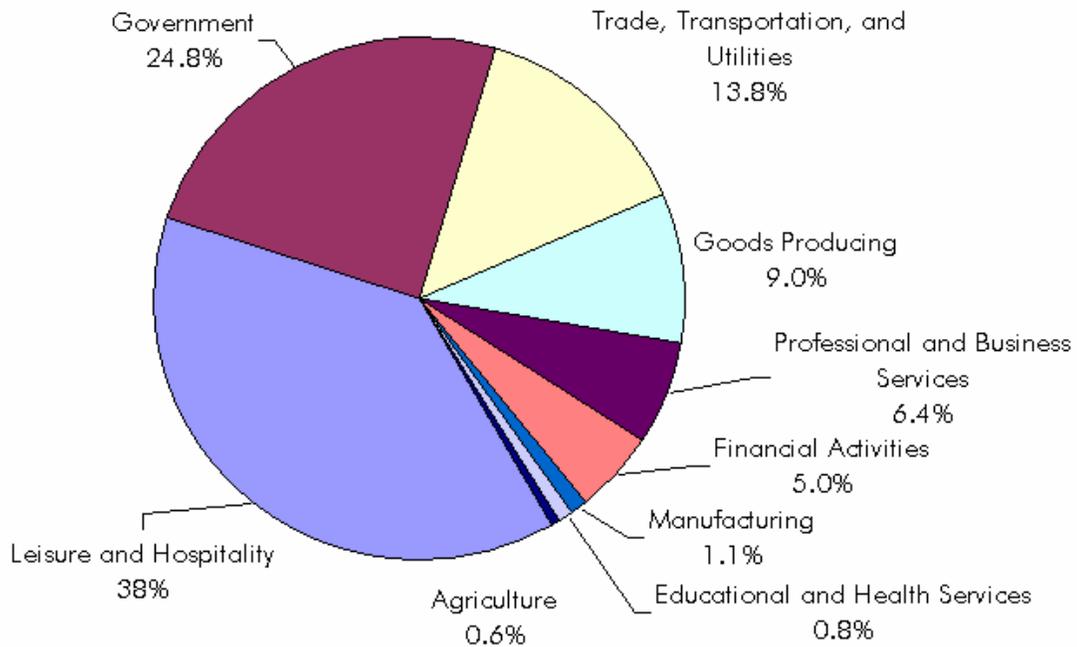
Source: U.S. Census 2000

### General Statistics

Employment (2005)	5,372
Average Salary (2005)	\$24,780
Taxable Sales (2005)	\$200.6 Million
Per Capita Taxable Sales (2005)	\$30,700
Median Home Price (2007)	\$905,000
Median Condo Price (2007)	\$546,000
Mono County Median Income (2006)	\$65,900
Mammoth Lakes Unemployment Rate	6.0 % (Jan.-Aug. average)

Source: UCSB Economic Forecast Report Town of Mammoth Lakes, June 2006;  
California Employment Development Department

### Mono County Employment by Industry, 2008



## Our Competitive Position and Long Term Outlook

In recent years there has been a great deal of progress in making the Town more economically sustainable. Mammoth's competitive position in the resort market has been strengthened by:

- Upgrades at the Mammoth Mountain Ski Area, which improve quality of the on mountain experience.
- Construction of the first phases of the North Village which provides a new type and quality of visitor accommodation and a sense of place and center of activity for visitors.
- Providing increased tourism and marketing funds through TOT increases.
- Formation of Mammoth Lakes Housing, Inc. as a provider of and advocate for workforce housing.
- Adoption of Measure "T" to fund public transit and creation of ESTA as a public sector transit provider.
- Formation of Mammoth Lakes Trails and Public Access.
- Adoption of Measure "R" to fund parks, recreation and trails.
- Initiation of winter commercial air service to expand our reach to additional markets.
- Close collaboration and partnership with the United States Forest Service.

These and many other public and private projects and programs have contributed to our competitiveness and have strengthened our economy. In spite of all this, our strong variability in seasonal visitation and the current economic climate is a reminder that the Mammoth economy is still very seasonal, and very vulnerable to forces outside our control.

Recent economic studies commissioned by the Town indicate positive long-term outlook for the community. The University of California, Santa Barbara (UCSB) Demographic and Economic Report (2006) report identified investment in the Town's resort infrastructure as a trend augmented by new development that would lengthen visits and increase visitation from both new and existing demographic visitors. Because of those trends, it is expected that Mammoth's economy will continue to show growth throughout the forecast horizon, although cyclical ups and downs should be expected. Retail, other services and construction will be the creators of economic activity during this development period.

The Economic Research Associates (ERA) economic report (2007) forecasts steady and reasonably strong long-term growth for Mammoth. The Town's projected year-round population is expected to grow to 11,200 by 2025. The number of visitor-nights is projected to increase from 2.16 million in 2007 to 3.04 million by 2025.

## **Market Position**

Because of the limited prospects to achieve economic diversification from the recreation and visitor-based economy; the Town should expand its recreation and resort business in order to attract more visitors, especially during mid-week winter and shoulder-season periods and function as a “destination resort.”

*Destination resorts* are distinguished from non-destination resorts by: the proximity of the resort to its primary market, the means by which the resort user reaches the resort, the frequency with which a user patronizes the resort, the typical length of stay, and the quality of the resort setting. Destination resorts tend to be a considerable distance from their primary markets, users travel by air rather than by car, visit infrequently (usually once a year or less and often only once), and book longer stays (often one- or two-week vacation visits). Destination resorts also tend to be located in dramatic or particularly attractive settings. Defining characteristics of destination resorts are:

- A higher ratio of hotel rooms to second homes, whereas the reverse is true for regional resorts.
- Hotel rooms tend to have a higher rate of occupancy (“hot beds”) than second homes and condominiums (“cold beds”).
- More upscale and expensive than regional resorts.
- A four-season resort amenity package that attracts visitors throughout the year.

The Town’s market position as a destination resort requires a community and economic development strategy that is as much focused on providing affordable housing and encouraging locals to spend locally as providing additional activities for skiers and other tourists to enjoy.

## **The 2007 General Plan – The Triple Bottom Line**

The 2007 General Plan places emphasis on achieving this end: becoming a premiere, year-round resort community. The General Plan states the importance of making decisions that achieve the triple bottom line:

*“The values of the community also encompass making decisions that benefit the community’s social, natural, and economic capital – the triple bottom line. Decisions that enhance all three aspects of community capital provide the greatest benefit; decisions that improve or conserve two forms of capital without diminishing the third are ideal. Decisions that only benefits one and decrease the other two forms of capital are undesirable.”*

The 2007 General Plan sets forth this vision statement and supporting values:

*“Surrounded by uniquely spectacular scenery and diverse four-season recreational opportunities, the community of Mammoth Lakes is committed to providing the very highest quality of life for our residents and the highest quality of experience for our visitors.*

*To achieve this vision, Mammoth Lakes places a high value on:*

1. *Sustainability and continuity of our unique relationship with the natural environment. As stewards, we support visitation and tourism as appropriate means to educate and share our*

*abundant resources. We are committed to the efficient use of energy and continuing development of renewable resources.*

2. *Being a great place to live and work. Our strong, diverse yet cohesive, small town community supports families and individuals by providing a stable economy, high quality educational facilities and programs, a broad range of community services and a participatory Town government.*
3. *Adequate and appropriate housing that residents and workers can afford.*
4. *Being a premier, year-round resort community based on diverse outdoor recreation, multi-day events and an ambiance that attracts visitors.*
5. *Protecting the surrounding natural environment and supporting our small town atmosphere by limiting the urbanized area.*
6. *Exceptional standards for design and development that complement and are appropriate to the Eastern Sierra Nevada Mountain setting and our sense of a “village in the trees” with small town charm.*
7. *Offering a variety of transportation options that emphasize connectivity, convenience and alternatives to use of personal vehicles with a strong pedestrian emphasis.*

The General Plan Economy Element states:

***E.1 Sustainable Economy:*** *Be a premier destination community in order to achieve a sustainable year-round economy.*

- *Prepare an economic development strategy*
- *Re-establish year around commercial air service*
- *Marketing, promotion and special events*

***E.2 Sustainable Tourism:*** *Achieve sustainable tourism by building on the area’s natural beauty, recreational, cultural, and historic assets.*

***E.3 Diversify Economy:*** *Achieve a more diversified economy and employment base consistent with community character.*

- *Business and employment*
- *Education*

### **Community and Economic Principles**

Our community and economic values and principles are designed to implement the General Plan and achieve self-sustaining vitality and target improvement of the livability and quality of life in the community through economic growth. Economic growth stimulates investment, high quality jobs, and wealth. Economic growth also provides opportunities to improve community-serving amenities and upgrade the character and quality of our environs. The following values are also in line with the broad goals, policies and actions contained in the Town’s General Plan:

**Partnership** - Create an alignment of strategic intent to collectively foster economic growth and improve the quality of life.

**People** - Develop people to power the economy. Increase educational attainment and skills, opportunities, and demand for local labor force. Recognize and increase community and business investment in, and commitment to, education.

**Place** - Improve quality of place to attract investment and occupancy by visitors and workers by establishing distinctive, quality, stable, safe and sustainable physical improvements and attractions that welcome business, commerce, tourism, employment, and wealth necessary to maintain and enhance quality of life. Increase the quality, supply and range of housing to attract and accommodate the work force.

**Positioning** - Develop and market the unique character, heritage and special attributes of the community as the premier mountain destination to visit, play, invest, work and live.

Our summary principles are:

1. Economic health and vitality is a critical part, but only a part, of a well-balanced community. Economic, social and natural factors (the triple bottom line) must all be taken into account in a balanced way when making any important decision about the community's future.
2. Tourism growth in the future will depend upon developing "destination tourism" where visitors make Mammoth Lakes their primary destination and hub for all of their activities. "Destination tourists" spend more money per capita and stay longer than stopover tourists. We must encourage both the public and private sectors to make the town a destination resort that achieves higher visitation during mid-week and shoulder seasons.
3. Crucial to the development of successful resort destinations is an understanding of the fundamental human desire to get away from familiar surroundings and experiences. Destination resort visitors as well as locals are looking for more varied recreational and resort options that offer a sense of authenticity, discovery, entertainment, and stimulation, composed to achieve a "Sense of Place."
4. The foundation of our economic prosperity is our unique quality of life-clean air and water, beautiful natural setting, abundant and accessible open space, diverse recreational opportunities, small town character, along with the personal safety and a true sense of community. We must pro-actively work to preserve and enhance these qualities to protect our future economy and way of life.
5. For Mammoth Lakes to remain viable for the future, major improvements in the way that people get around town are needed.

6. Positive economic development must serve the daily, basic needs of the people of the community because it is integral to their quality of life. Existing businesses are one our greatest but they are often taken for granted and not included as part of the economic plan. Expansion of already established businesses is a very cost effective form of economic development.
7. Economic diversity is an essential part of any healthy economic system. Our town is home to a variety of workers of all skill and education levels and all need and deserve a decent job.
8. Mammoth Lakes has become one of the least affordable housing markets in the state and the nation. Since 2000, the community has identified the lack of affordable workforce housing as a significant business issue. The Town has recognized that a livable, balanced community depends on widely diverse types of workers and each has to have somewhere to live. For the social and economic health of the community, it is important for the community to take a proactive leadership role in addressing housing needs.
9. Investment in technology is needed to support the ability of local enterprises to succeed, improves civic life, and provides open access to information and resources.
10. Cooperation with Mono County and other agencies is important to provide cost effective services and a more regional approach to economic, transportation, and land use planning.