Mammoth Lakes & Mono County BR&E Study

August 2018
## Survey Methodology

<table>
<thead>
<tr>
<th>Mode</th>
<th>Web Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience</td>
<td>132n Business Residents in Mammoth Lakes and Mono County</td>
</tr>
<tr>
<td>Field Dates</td>
<td>August 2018</td>
</tr>
<tr>
<td>Length</td>
<td>97 questions</td>
</tr>
<tr>
<td>Margin of Error</td>
<td>+/- 8.5</td>
</tr>
</tbody>
</table>
Demographics
In what category does your business fall? (Q.5) **Base: 131n**

- **Lodging**: 30
- **Restaurant/coffee shop/brewery**: 18
- **Professional services**: 11
- **Retail**: 11
- **Activities/recreation/guest services**: 10
- **Construction/trades**: 3
- **Other**: 17
Where is your business located? (Q.6) **Base: 131n**

- **Mono County**: 61%
- **Mammoth Lakes**: 39%
- **June Lake/Lee Vining**: 28%
- **Bridgeport/Walker**: 21%
- **South County**: 12%
Did your business start up here, move here, or was it purchased from a previous owner? (Q.7) Base: 132n

How familiar were you with the area before you located your business here? (Q.9) Base: Those who started or moved here, 112n

- Started here, 56%
- Purchased here, 42%
- Moved here, 2%

Bar chart:
- Previous/current resident: 65
- Previous visitor: 30
- Had not been to Mono County: 3
- Other: 2
Owned or Leased Property

Is your business property owned or leased? (Q.10) **Base: 126n**

Owned, 59%

Leased, 41%
Does your business operate year round or seasonally? (Q.11) **Base: 129n**

- **Year round**, 67%
- **Seasonally**, 33%
What were your total annual sales in 2016? Specify or select the range if you do not want to provide a more precise answer. (Q.14) **Base: 118**

- $0-$100,000: 21
- $101,000-$300,000: 15
- $301,000-$500,000: 10
- $501,000-$750,000: 9
- $751,000-$1 million: 9
- >$1 million to $1.5 million: 8
- >$1.5 million to $2 million: 4
- >$2 million to $4 million: 7
- >$4 million to $6 million: 4
- More than $6 million: 4
- Other: 9
Does most of your business come from residents or visitors? (Q.15) **Base: 128n**

- Visitors, 64%
- Residents, 9%
- An equal mix, 18%
- Other, 9%
Business Climate
Two years from now, do you think business conditions in Mammoth Lakes/Mono County for you will be better, worse or the same as they are today? (Q.22) **Base: 124n**

- **Net: Better** 74%
- **Net: Worse** 4%

Pie chart showing percentages of responses:
- Much better: 48%
- Somewhat better: 26%
- No difference/ Same: 19%
- Somewhat worse: 3%
- Much worse: 1%
- Don’t know: 3%
Connectivity & Services
How important are each of the following to your business. (Q.23-29) 

<table>
<thead>
<tr>
<th>Service</th>
<th>Important</th>
<th>Not Important</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable internet service</td>
<td>99</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Reliable cell service</td>
<td>93</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Tourism marketing</td>
<td>91</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>Support from town/county planning...</td>
<td>84</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>Well kept public recreation areas</td>
<td>83</td>
<td>16</td>
<td>1</td>
</tr>
<tr>
<td>Minimizing road closures</td>
<td>80</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>Air service into/out of the region</td>
<td>45</td>
<td>53</td>
<td>2</td>
</tr>
</tbody>
</table>

Base: 124-125n
Business Needs (Performance)

And how well are your business’ needs currently being met in each of these areas. (Q.30-36)

Base: 121-125n

- Tourism marketing: Well 83, Not Well 6, Don't Know 11
- Reliable internet service: Well 72, Not Well 28
- Reliable cell service: Well 71, Not Well 27
- Well kept public recreation areas: Well 71, Not Well 14
- Minimizing road closures: Well 61, Not Well 27
- Support from town/county planning: Well 53, Not Well 24
- Air service into/out of the region: Well 32, Not Well 45

Don't Know percentages are not shown in the chart.
How important are each of the following? And how well are your business’ needs currently being met in each of these areas? (Q.23-36) **Base: 121-125n**

- **Importance/Performance Analysis**
  - **Importance**
  - **Performance**
  - **Gap**

<table>
<thead>
<tr>
<th>Service</th>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable internet service</td>
<td>99</td>
<td>72</td>
<td>27</td>
</tr>
<tr>
<td>Reliable cell service</td>
<td>93</td>
<td>71</td>
<td>22</td>
</tr>
<tr>
<td>Support from planning depts and Chamber</td>
<td>84</td>
<td>53</td>
<td>31</td>
</tr>
<tr>
<td>Tourism marketing</td>
<td>91</td>
<td>83</td>
<td>8</td>
</tr>
<tr>
<td>Well kept public recreation areas</td>
<td>83</td>
<td>71</td>
<td>12</td>
</tr>
<tr>
<td>Air service</td>
<td>80</td>
<td>45</td>
<td>35</td>
</tr>
</tbody>
</table>

*Note: Air service is much more important to businesses in Town (77%) than those in the County (25%).*
How well do you understand the options you have in Mono County for high speed internet connectivity? (Q.38) **Base: 123n**

**Internet Connectivity**

**Net: Understand Well**
- 75%

**Net: Not Well**
- 24%

- Very well: 51%
- Somewhat well: 24%
- Not too well: 15%
- Not at all: 9%
- Don’t know/No response: 1%
How would you rate the value you get from the local internet service providers? (Q.39) **Base: 124n**

**Internet Value**

Net: Good Value
72%

Net: Poor Value
27%

- Very good value: 45%
- Somewhat good value: 15%
- Somewhat poor value: 12%
- Very poor value: 1%
- Don’t know/No response: 27%
How important is it to your business’ growth to be able to offer reliable high speed internet access to your guests or customers? (Q.40) **Base: 124n**

- **Net: Important 74%**
  - Very important: 56%
  - Somewhat important: 18%
  - Not too important: 12%
  - Not at all important: 8%
  - Don’t know/No response: 6%

- **Net: Not Important 20%**
How well does the region’s overall technology and internet infrastructure meet your company’s growth plan needs? (Q.41) **Base: 124n**

- **Net: Well** 65%
- **Net: Not Well** 27%
Workforce Issues
Does your business have difficulty... (Q.43-46) \textbf{Base: 120n-122n}

- Recruiting seasonal employees:
  - Yes: 47
  - No: 29
  - Don't Know: 24

- Recruiting year round employees:
  - Yes: 44
  - No: 27
  - Don't Know: 29

- Retaining seasonal employees:
  - Yes: 29
  - No: 42
  - Don't Know: 29

- Retaining year round employees:
  - Yes: 23
  - No: 46
  - Don't Know: 31
When does your business have difficulty recruiting or retaining employees? (Check all that apply) (Q.47) **Base: Those who have workforce issues, 61n**

- Year-round: 51
- January: 10
- February: 10
- March: 13
- April: 36
- May: 21
- June: 20
- July: 21
- August: 25
- September: 25
- October: 21
- November: 10
- December: 7
Which of the following are the greatest barriers to maintaining your workforce? (Check all that apply) (Q.48) **Base: 109n**

- Affordability/availability of local housing: 79
- Lack of candidates with adequate training: 50
- Seasonality of work: 40
- Wage/benefit competitiveness: 28
- Lack of career opportunities: 20
- High turnover rate: 17
- Quality of schools/education: 14
- Other: 29
Which type of your employees have the most critical need for housing? (Check all that apply)
(Q.49) **Base: 98n**

- Seasonal frontline employees: 62
- Year-round frontline employees: 59
- Middle management employees: 30
- Senior management employees: 20
- Other: 18
Does your business provide any employee housing? (Q.50) **Base: 121n**

Is the housing your business provides enough for your staff? (Q.51) **Base: Those that provide employee housing, 47n**
Which of the following types of training does your business need most? (Check all that apply)  
(Q.52) **Base: 108n**

- Customer service: 56
- Basic workforce skills: 37
- Professionalism: 32
- Management/leadership: 31
- Sales/marketing: 30
- Computer skills: 28
- Budgeting/finance: 25
- Expertise/certification in your...: 22
- Business planning and organization: 21
- Clerical/Office skills: 12
- Education/qualifications: 9
- Other: 33
How are management roles most often filled in your business? (Q.53) **Base: 80n**

- Promotion from within, 69%
- Outside recruiting, 5%
- An equal mix, 26%
How well equipped is your management staff with what they need to be successful? (Q.54)
Base: 107n

Net: Well Equipped 72%
Net: Not Well Equipped 5%

- Very well equipped: 39%
- Somewhat well equipped: 33%
- Not too well equipped: 4%
- Not at all equipped: 1%
- Don’t know/No response: 23%
Local Management Training

If management training or mentoring opportunities were available locally, how likely would your business be to utilize them? (Q.56) **Base: 122n**

- **Very likely**: 33%
- **Somewhat likely**: 28%
- **Somewhat unlikely**: 6%
- **Very unlikely**: 12%
- **Don’t know/No response**: 21%

**Net:**
- **Likely**: 61%
- **Unlikely**: 18%
How well equipped is your frontline or customer service staff with the skills they need to be successful? (Q.57) **Base: 121n**

- **Net: Well Equipped** 78%
- **Net: Not Well Equipped** 5%

**Net: Not Well Equipped**
- Very well equipped: 36%
- Somewhat well equipped: 42%
- Not too well equipped: 17%
- Not at all: 4%
- Don’t know/No response: 1%

**Frontline/Customer Service**
If customer service training or mentoring opportunities were available locally, how likely would your business be to utilize them? (Q.58) **Base: 120n**

**Local Customer Service Training**

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>40%</td>
</tr>
<tr>
<td>Somewhat likely</td>
<td>24%</td>
</tr>
<tr>
<td>Somewhat unlikely</td>
<td>8%</td>
</tr>
<tr>
<td>Very unlikely</td>
<td>17%</td>
</tr>
<tr>
<td>Don't know/No response</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Net:**
- Likely: 64%
- Unlikely: 19%

---

**Note:** The pie chart represents the distribution of responses among the different likelihood categories. The net percentages are calculated by subtracting the unlikely responses from the likely responses, giving a clear indication of the overall likelihood.
Which of the following customer service training methods would be most beneficial to your business? (Q.59) **Base: 104n**

- In-person training sessions with instructor, 33%
- Online, 18%
- A combination of both, 37%
- Other, 12%
Are you aware of any of Mono County’s workforce services or subsidized employment/training programs? (Q.60) **Base: 121n**

- Yes: 31%
- No: 69%
Planning Process
Have you contacted (phone, email, in person) the Mammoth Lakes Planning Department or the Mono County Community Development/Planning Department in the past three years regarding your business? (Q.61) **Base: 124n**

- **Yes, Mammoth Lakes, 11%**
- **Yes, Mono County, 40%**
- **Yes, both, 15%**
- **No, neither, 34%**

**Net: Yes 66%**
### Reasons For Contacting The Planning Department

Why did you contact the Mono County or Mammoth Lakes planning department? (Check all that apply) (Q.62) **Base: Those who have contacted the planning department, 82n**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>To file for a building permit</td>
<td>50</td>
</tr>
<tr>
<td>To talk to staff about potential projects</td>
<td>39</td>
</tr>
<tr>
<td>To file for/follow up with a permit from Environmental Health</td>
<td>15</td>
</tr>
<tr>
<td>To respond to a code enforcement citation</td>
<td>7</td>
</tr>
<tr>
<td>To file a code enforcement complaint</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>35</td>
</tr>
</tbody>
</table>
How would you rate each of the following aspects of the process on a scale of one to five, where a one means very unfavorable and a five means very favorable? (Q.63-67) **Base: 74-76n**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Favorable (4-5)</th>
<th>Neutral (3)</th>
<th>Unfavorable (1-2)</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial response time</td>
<td>66</td>
<td>15</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Clear and understandable responses to initial inquiries</td>
<td>65</td>
<td>8</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Clear and understandable direction on next steps</td>
<td>63</td>
<td>11</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Overall satisfaction with encounter</td>
<td>60</td>
<td>17</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Quality of handouts and materials</td>
<td>33</td>
<td>11</td>
<td>9</td>
<td>47</td>
</tr>
</tbody>
</table>
Are you aware that the Mono County and Mammoth Lakes community development departments provide the following services? (Q.68-74)

- **Online access to maps, land parcel information and development...**
  - Yes: 72
  - No: 28

- **Community-based planning (60n)***
  - Yes: 68
  - No: 32

- **Free consultation with town/county staff (104n)**
  - Yes: 44
  - No: 56

- **A one-stop shop for building permit application submittal that...**
  - Yes: 43
  - No: 57

- **Free multi-departmental consultation with town staff (105n)**
  - Yes: 42
  - No: 58

- **No development impact fees or housing mitigation fees (60n)***
  - Yes: 27
  - No: 73

- **Streamlined permitting through CEQA tiering (60n)***
  - Yes: 23
  - No: 77

* Asked of Mono County only
Did you take advantage of the free consultation offered by the planning department? (Q.76)

Base: 105n

- Yes: 24%
- No: 76%
Are you aware that the County is responsible for enforcing many regulations that are set at the state level in areas such as state regulated building codes, health and safety issues, and environmental requirements? (Q.77) **Base: 113n**

- **Yes**: 89%
- **No**: 11%
Community Attributes
What are your future business location intentions? (Check all that apply) (Q.78) **Base: 121n**

- Continue operating at my current business location: 46
- Expand at the present location: 21
- Expand my business but cannot do so at this location: 6
- Keep present facility and open another facility at a different site: 4
- Expand my business to another location in Mammoth Lakes/Mono County but cannot find alternative space: 3
- Expand my business to another location in Mammoth Lakes/Mono County but finances do not allow it: 2
- Considering relocating my business out of the Mammoth Lakes and Mono County area: 2
- Other: 16
How would you rate Mammoth Lakes/Mono County as a location for your business? (Q.80)
Base: 121n

Net: Excellent/Good
86%

Net: Average/Poor
14%
How have your experiences been with the following community services/amenities from Unfavorable to Favorable. (Q.83-94) **Base: 120-121n**

<table>
<thead>
<tr>
<th>Services/Amenities</th>
<th>Favorable (4-5)</th>
<th>Neutral (3)</th>
<th>Unfavorable (1-2)</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fire department services</td>
<td>88</td>
<td>7</td>
<td>4</td>
<td>53</td>
</tr>
<tr>
<td>Police/public safety</td>
<td>77</td>
<td>7</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Mono County Dept of Tourism and Economic Dev.</td>
<td>71</td>
<td>7</td>
<td>3</td>
<td>19</td>
</tr>
<tr>
<td>Ambulance services</td>
<td>71</td>
<td>25</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Local Chamber of Commerce*</td>
<td>61</td>
<td>14</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Streets, roads, highways, sidewalks</td>
<td>53</td>
<td>12</td>
<td>33</td>
<td>2</td>
</tr>
<tr>
<td>Health care services</td>
<td>52</td>
<td>13</td>
<td>23</td>
<td>12</td>
</tr>
<tr>
<td>Public transportation</td>
<td>52</td>
<td>8</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>K-12 Education</td>
<td>40</td>
<td>7</td>
<td>16</td>
<td>37</td>
</tr>
<tr>
<td>Access to higher education</td>
<td>36</td>
<td>11</td>
<td>20</td>
<td>33</td>
</tr>
<tr>
<td>Air service</td>
<td>35</td>
<td>12</td>
<td>23</td>
<td>30</td>
</tr>
<tr>
<td>Child care services</td>
<td>15</td>
<td>8</td>
<td>26</td>
<td>51</td>
</tr>
</tbody>
</table>

*Town of Mammoth businesses rate their chamber 81% positive
Our local survey team cannot promise to solve all the issues identified today, but we are fully committed to look into them. Would you like to have a local business development professional (from the Mammoth Lakes Chamber, the Town of Mammoth Lakes or Mono County) contact you to assist with any specific issues mentioned today? (Q.98) **Base: 115n**