



Mammoth Lakes Tourism
Fall 2021 Advertising Effectiveness Research
November 2021

Background & Objectives

- Since 2013, Mammoth Lakes Tourism (MLT) has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct advertising effectiveness and seasonal visitor profile measures. With leisure travel recommencing after 2020's COVID-19 travel restrictions, MLT and its partners are eager to measure the impact of their advertising and public relations campaigns on visit intent and visitation, and on responsible, sustainable tourism.
- This report focuses on the Fall 2021 paid advertising. Goals are to:
 - Measure awareness of the advertising in California and Nevada
 - Assess reactions to the creative
 - Gauge impact of the advertising on destination image, destination rating, and likelihood to visit versus the competitive set
 - Examine traveler sentiment: track views toward travel and travel behaviors in the context of the pandemic, safety, etc.
 - Present insights and recommendations

Pandemic considerations

- Prior to the COVID-19 pandemic, advertising awareness could be fairly well predicted from the dollar amount invested in the media buy, size of the target population, and strength of the advertising at communicating key messages. Now, however, a whole host of variables complicates that formula, including:
 - **COVID-19** – This is the most obvious and most disruptive element in the landscape, interrupting travel plans, reducing likelihood to travel, and changing the way people choose and get to destinations. While the vaccine has curbed the influence of the virus somewhat, impacts are still playing out in the travel landscape, such as vaccine hesitancy, the mask debate, etc. Additionally, the emergence of new strains (Delta and Omicron) and regional spikes in cases continue to impact consumers and their attitudes.
 - **Changes in travel behavior/preferences** – The concern about crowds and larger urban areas led people to flock to more rural destinations, such as Mammoth Lakes. This has resulted in more acute issues of overtourism, and the necessity to change messaging to consumers.
 - **Non-travelers may be paying less attention to travel ads** – SMARInsights has seen across several clients that travelers who are not intending a trip in the near future are less aware of travel ads. This makes intuitive sense, since relevance is one element of ads that break through the clutter of media messaging.
 - **New creative** – Even prior to the pandemic, a new campaign typically had lower awareness than a campaign that had run for several seasons and had had time to wear in with consumers. Additionally, some of the new creative from Mammoth is aimed at educating consumers, as well as marketing the destination.

Insights

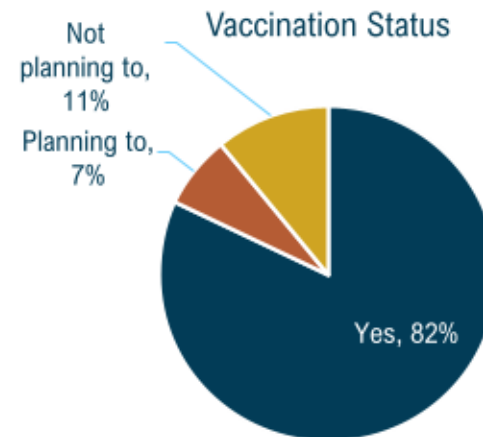
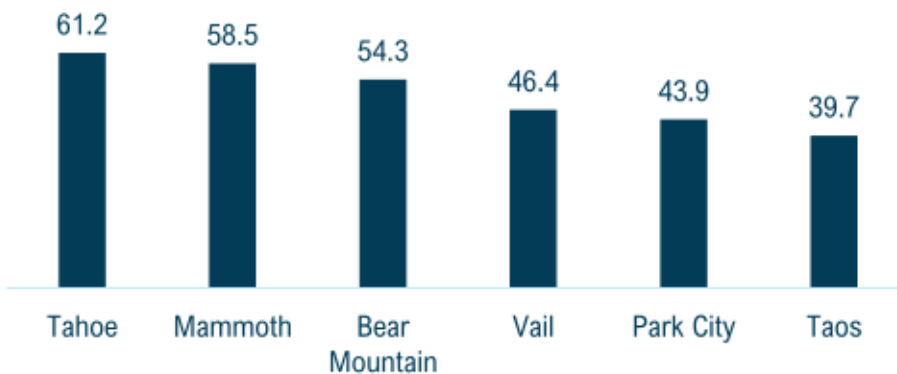
- The Mammoth Fall campaign leveraged a smaller budget to generate strong awareness. The campaign was very efficient with a cost per aware household below 2019, and well below the national benchmark.
- The creative is well received and generates almost no negative reactions. Consumers are more receptive to the traditional ads (*Fall*) but are also very positive about the *Hug What You Love* campaign that attempts to educate consumers about how to help preserve the destination.
- The advertising is quite effective at improving perceptions of the destination and communicating that Mammoth is unlike any other destination, otherworldly, and luxurious. While Mammoth still lags behind Lake Tahoe in consumer perceptions, the advertising helps close the gap and differentiate Mammoth.
- The advertising also spurs consumers to want to learn more about Mammoth through the destination's owned assets (visitor guide and website) and through social media.
- The result is that those with ad recall indicate they are much more likely to visit Mammoth – the percentage jumps from 26% to 49%.

Measure	MLT Fall 2019 Campaign Performance	MLT Fall 2021 Campaign Performance	SMARInsights Benchmark
Awareness	26%	29%	32%
Cost per aware household	\$0.11	\$0.08	\$0.50

Mammoth is considered a safer option than many key competitors

- As noted, one of the issues that destinations must deal with is the impact of the coronavirus. In this area, Mammoth has an advantage compared to several key competitors – it is viewed as safer. Consumers also view Tahoe as relatively safe, so the advantage is generally against out-of-state competitors.
- With Mammoth's focus on outdoor travelers and California/Nevada residents, the percentage of vaccinated consumers is quite high.

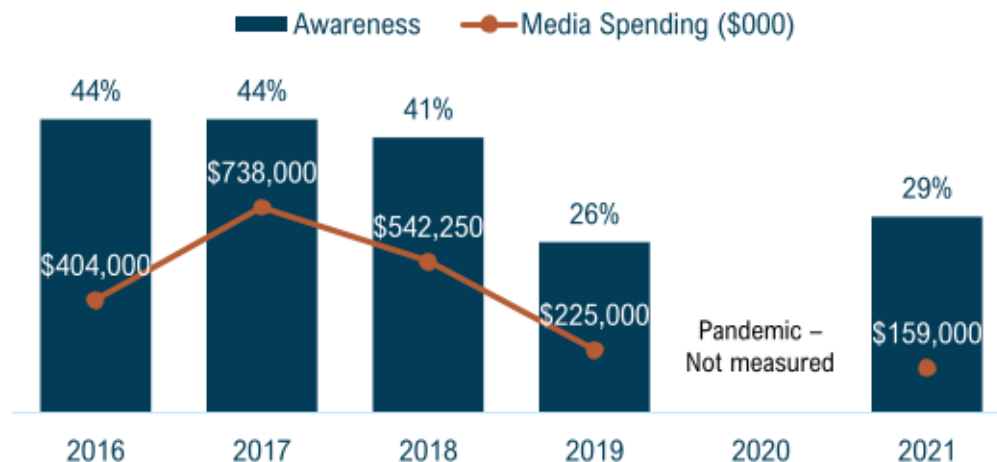
% Perceive Destination to be Safe
(given coronavirus)



Even with a decreased budget, recall of the advertising surpassed 2019

- While recall was still much lower than 2016-18, the smaller budget was effectively spent to generate 29% recall. The efficiency is evident in the cost per aware household – at \$0.08 this is lower than Fall 2019, and well below SMARInsights national benchmark.

Fall Campaign Awareness

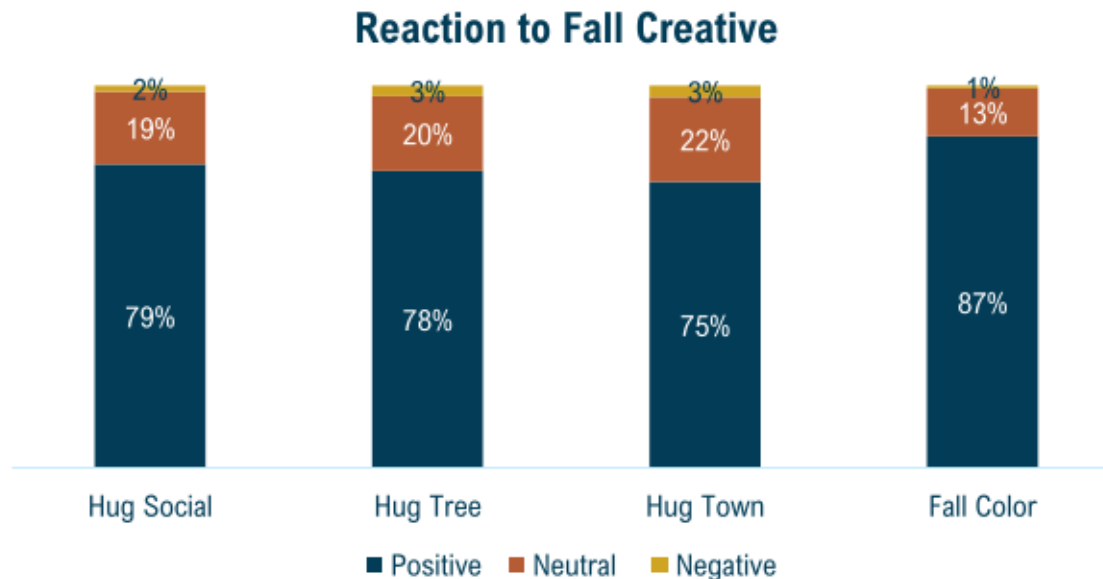


Cost Per Aware HH

Fall 2019	\$0.11
Fall 2021	\$0.08
Benchmark	\$0.50

Consumers are positive about the new creative

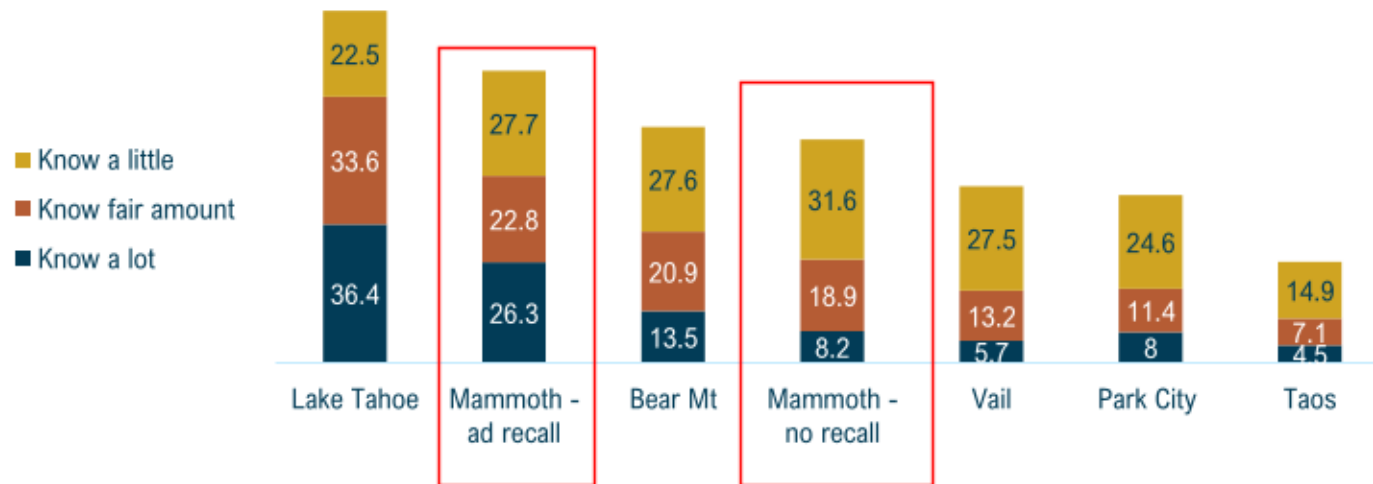
- Reactions to both *Hug What You Love* and the *Fall* campaign were overwhelmingly positive, with almost no negative reactions. While consumers are a bit more positive about the more traditional Fall campaign, the strong positive reactions to *HWYL* shows that this messaging also works with consumers.



The ads help drive stronger familiarity with the destination

- Those with recall of the ads indicate much stronger familiarity with Mammoth. Lake Tahoe has the strongest familiarity, and that's true even with ad recall. But the gap is much smaller among those who recall the Mammoth ads.

% Familiarity with Each Destination – by Ad Recall



The ads also improve consumers' image of the destination

- The table below compares the image ratings among those with and without recall of the Mammoth ads. Those with recall are much more likely to indicate that Mammoth has an otherworldly natural landscape and offers an extraordinary sense of awe and exhilaration.
- The attributes highlighted in blue are those with strong correlations to likelihood to visit Mammoth Lakes. Positively impacting these views of the destination is more likely to generate visit interest.
- The strong positive impact of ad awareness on these descriptors is a positive finding.

Attribute	No recall	Ad recall	Difference
Has an otherworldly natural landscape	3.75	4.05	0.30
Offers an extraordinary sense of awe and feeling of exhilaration	3.80	4.06	0.26
Is an authentic outdoor playground	3.95	4.16	0.21
Is a destination for outdoor adventurers	4.06	4.23	0.17
Offers an abundance of year-round activities right outside your door	3.80	3.97	0.17
Is majestic in scale and awesome in its natural beauty	3.94	4.11	0.17
Has an abundance of diverse terrain	3.82	3.95	0.13

New image descriptors

- Several image attributes were added to this wave of research to help determine what differentiates Mammoth Lakes from its closest competitor, Lake Tahoe.
- These attributes have not been specifically addressed in the marketing, yet the Fall ads did positively impact two of them – that Mammoth Lakes is unlike anything people have seen before, and that it is refined and luxurious.
- Next we will look at ad impact on image attributes compared to Lake Tahoe.

Attribute	No recall	Ad recall	Difference
Is like nothing I have ever seen before	3.34	3.76	0.42
Is refined and luxurious	3.33	3.70	0.37
Is unpretentious	3.55	3.42	—
Is rustic and rugged	3.72	3.57	—

Ads also help change competitive situation

- Mammoth's biggest competitor is Lake Tahoe – and generally consumers have a more positive image of Tahoe compared to Mammoth. In fact, without the advertising, the only area where Mammoth gets a stronger rating is for being rustic and rugged.
- But among those with ad recall, Mammoth has much stronger ratings and exceeds Tahoe for “is like nothing I have ever seen before” and “has an otherworldly natural landscape.” The ratings overall for Mammoth (among ad aware) are very similar to Tahoe – making it much more competitive.

Attribute	Mammoth	Tahoe	Difference	Mammoth-ad recall	Difference (Tahoe/Mammoth) with ad recall
Is like nothing I have ever seen before	3.46	3.62	-0.16	3.76	0.14
Has an otherworldly natural landscape	3.84	4.02	-0.18	4.05	0.03
Is refined and luxurious	3.43	3.73	-0.3	3.70	-0.03
Has an abundance of diverse terrain	3.86	4.03	-0.17	3.95	-0.08
Is an authentic outdoor playground	4.01	4.24	-0.23	4.16	-0.08
Is rustic and rugged	3.68	3.65	0.03	3.57	-0.08
Is a destination for outdoor adventurers	4.11	4.32	-0.21	4.23	-0.09
Offers an extraordinary sense of awe and feeling of exhilaration	3.88	4.15	-0.27	4.06	-0.09
Is unpretentious	3.51	3.52	-0.01	3.42	-0.10
Is majestic in scale and awesome in its natural beauty	3.99	4.28	-0.29	4.11	-0.17
Offers an abundance of year-round activities right outside your door	3.85	4.17	-0.32	3.97	-0.2

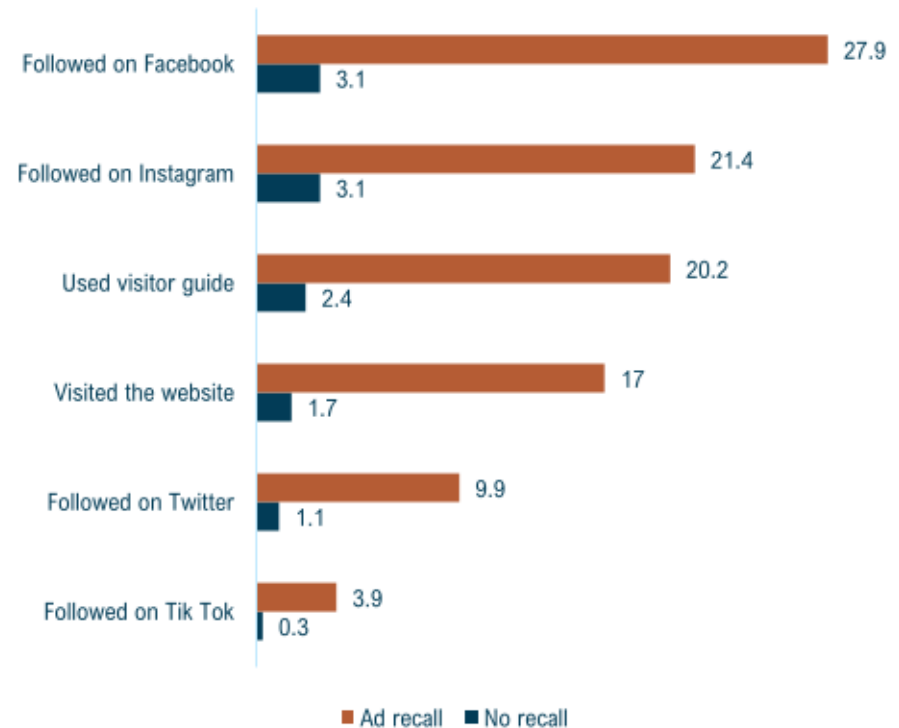
In addition to impacting perceptions, the advertising encourages consumers to find out more about Mammoth

- Those who recall the advertising are much more likely to gather information about the destination across social channels and use the visitor guide and destination website. And those using the visitor guide are generally using it before they decide to visit.

Did you view the visitor guide...?



Impact of Advertising (% used each source)



The most important impact is that the advertising increases likelihood to visit.

- The likelihood to visit Mammoth increases from 26% to 49% when consumers are exposed to the advertising. While consumers are still more likely to visit Tahoe, among the ad-aware the gap is much smaller.
- This should result in a strong impact on actual travel and a strong return on investment from the advertising.

Likelihood to Visit in Next Year

