



Mammoth Lakes Tourism

Winter 2023 Advertising Effectiveness Research

June 2023

Objectives

- This report focuses on Winter 2023 paid advertising, which officially launched MLT's new brand campaign, The Real Unreal.
- Goals are to:
 - Measure awareness of the advertising in three markets – California/Nevada, Denver and the Northeast (New York City & Boston)
 - Assess reactions to the creative
 - Gauge impact of the advertising on destination image, destination rating, and likelihood to visit vs. the competitive set
 - Measure advertising impact on visitation
 - Calculate an ROI on the campaign
 - Look at the impact of the campaign on visitor understanding of responsible, sustainable tourism
 - Present insights and recommendations

Campaign Overview

- The advertising campaign included a mix of video, interactive TV, digital and social advertising, as well as out of home in specific markets.
- The total spending for this winter campaign was \$1.6 million. *The national campaign was \$487,000, and only \$104K of that is measured by this study.

Market	Dedicated	% of National*	Total
California & Nevada	\$369,560	\$57,464	\$427,024
Denver	\$470,777	\$7,248	\$478,025
NE	\$651,333	\$40,067	\$691,400
Total	\$1,491,670	\$104,779	\$1,596,449

*Part of the campaign was a national buy of \$487,343. The total national buy was prorated based on the population targeted in this study and that spending was included in the ROI calculation.



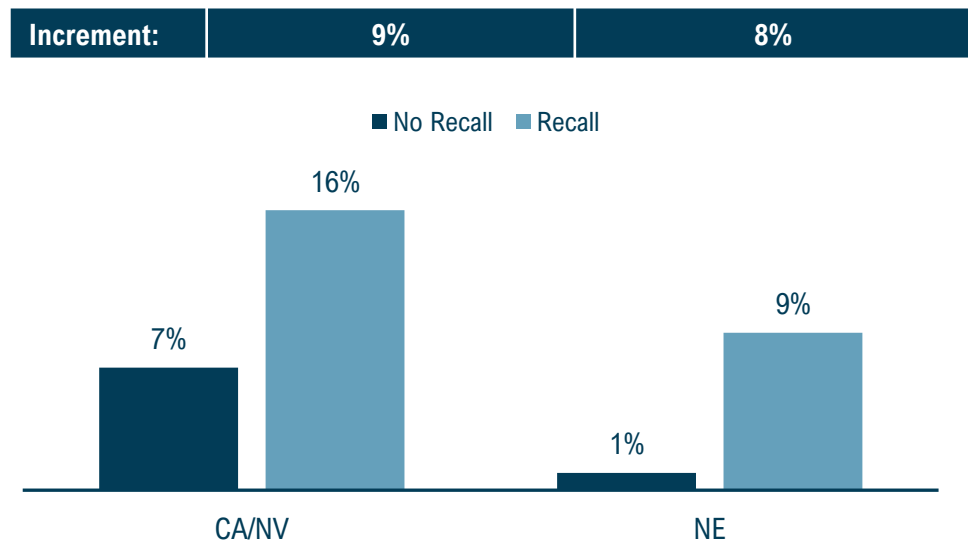
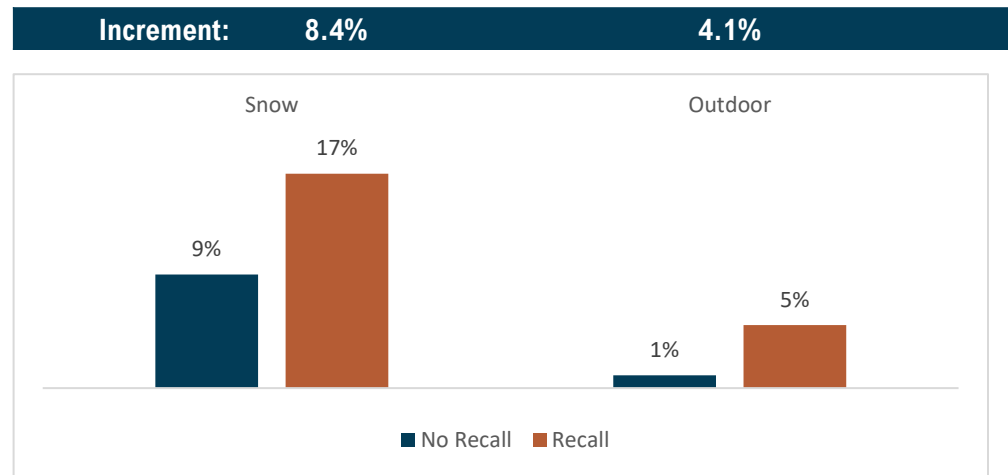
Winter ads influenced 292,000 trips and \$571M in visitor spending

- Mammoth Lakes Tourism's Winter campaign was successful and generated more than 292,000 incremental trips to the destination. These trips represented \$571 million in influenced visitor spending and returned \$358 for each \$1 spent in marketing.

FY22-23	Snow	Outdoor	TOTAL
Awareness	46%	34	40%
Aware HH	1,707,555	3,634,746	5,432,301
Increment	8.4%	4.1%	5..59%
Influenced trips	143,435	149,025	292,459
Trip spending	\$2,599	\$1,334	\$1,954
Influenced visitor spending	\$372,786,601	\$198,798,810	\$571,585,411
Media spending			\$1,596,449
ROI			\$358

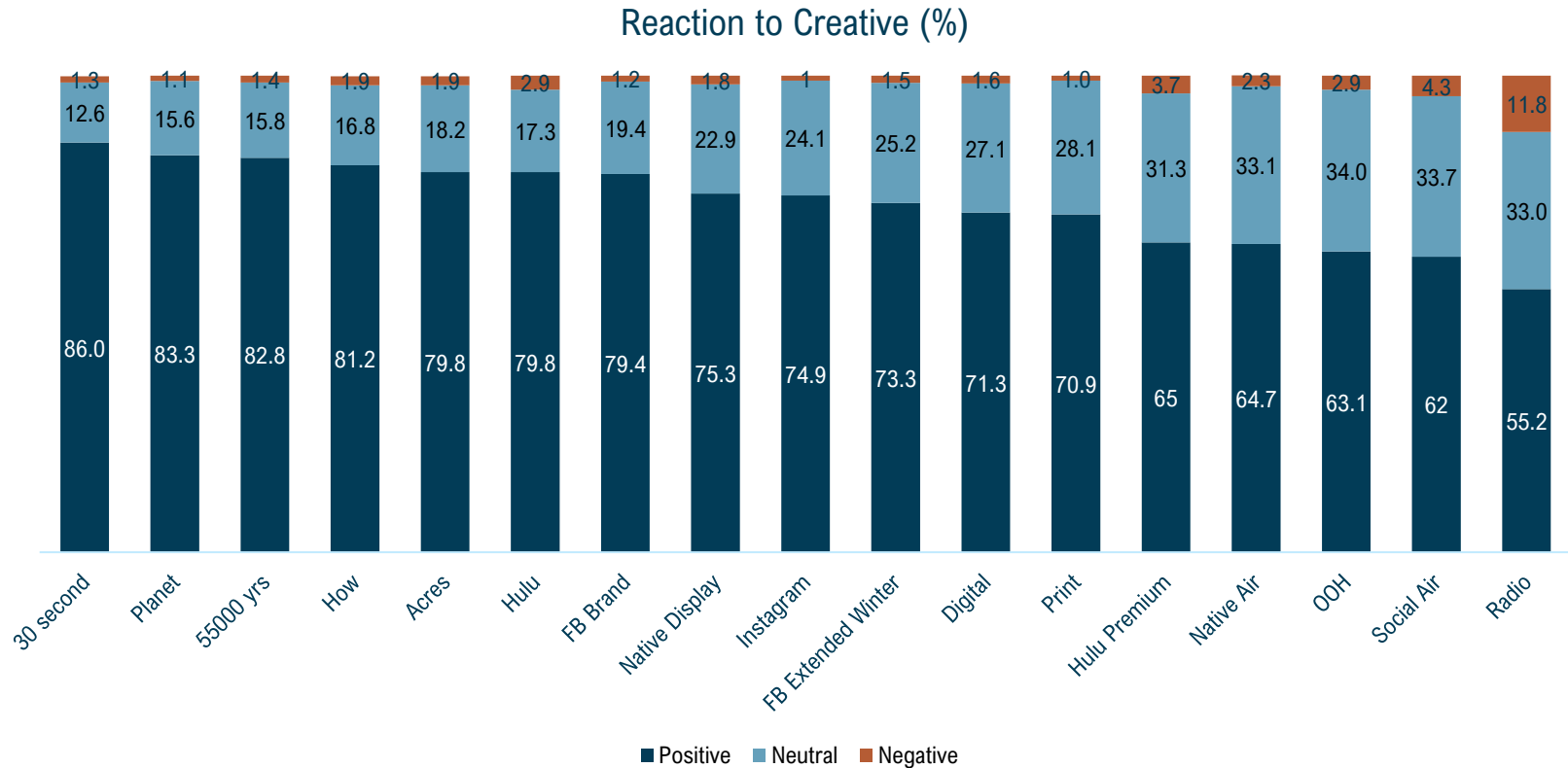
Advertising generated additional travel from both Snow and Outdoor audiences

- There was incremental travel generated from both the Snow and Outdoor audiences. The lift was stronger among the Snow audience at 8.4 points vs. only 4.1 for the Outdoor audience.
- When markets are considered, there was incremental travel from the California/Nevada and Northeastern markets.



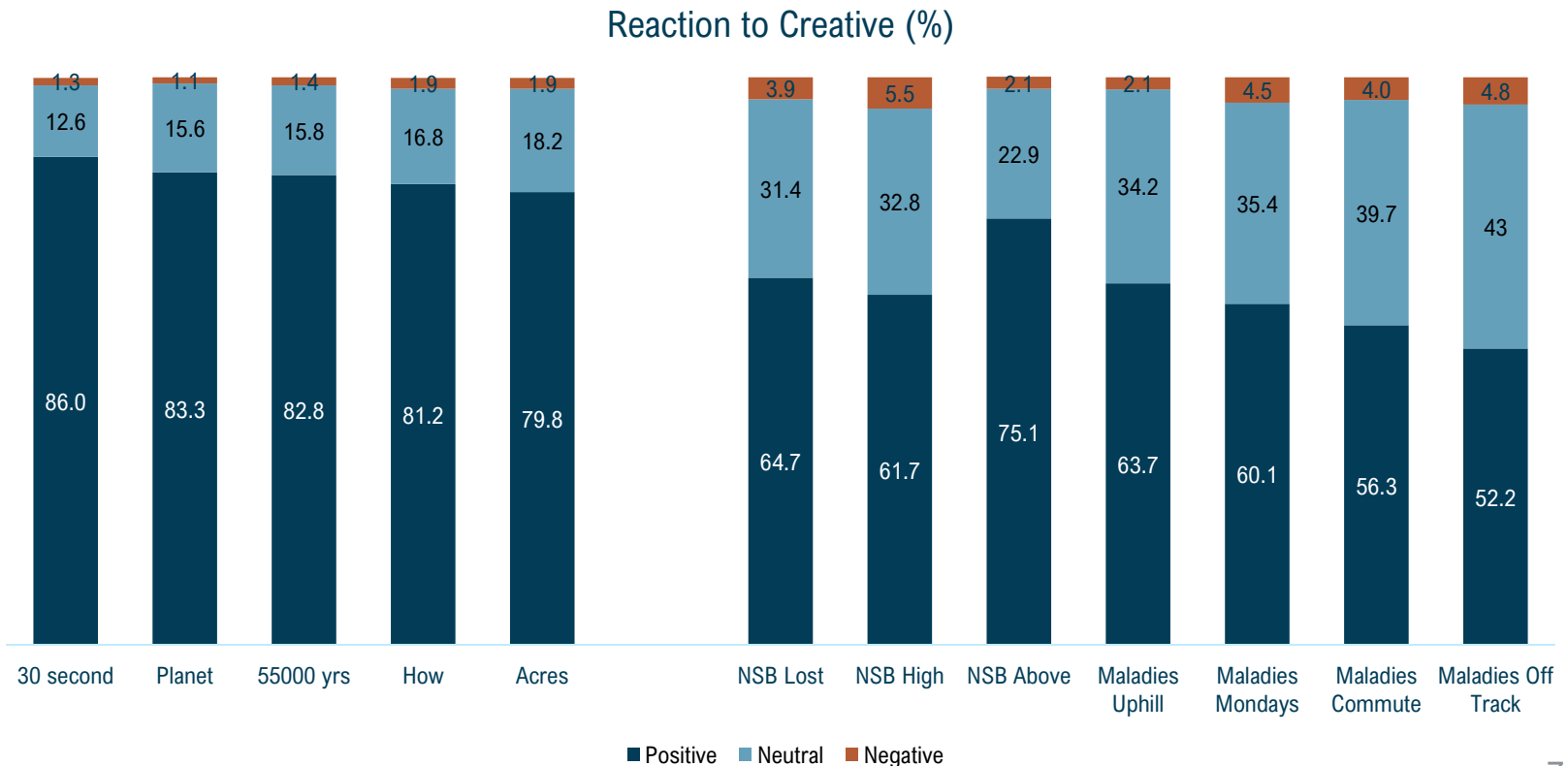
Reaction to Unreal Creative

Reaction to the creative is positive overall, although it varies considerably. The benchmark for good creative is 60% positive – so all but the radio beats this criteria. There are also almost no negative reactions, which supports the strength of this creative.



Comparison to Past Campaign

It is also useful to compare the results for this year to the past. The previous creative generated more neutral reactions from consumers, and more negative. The current campaign generates much stronger positive reactions – in fact, as high as SMARInsights has measured for any tourism marketing campaign.

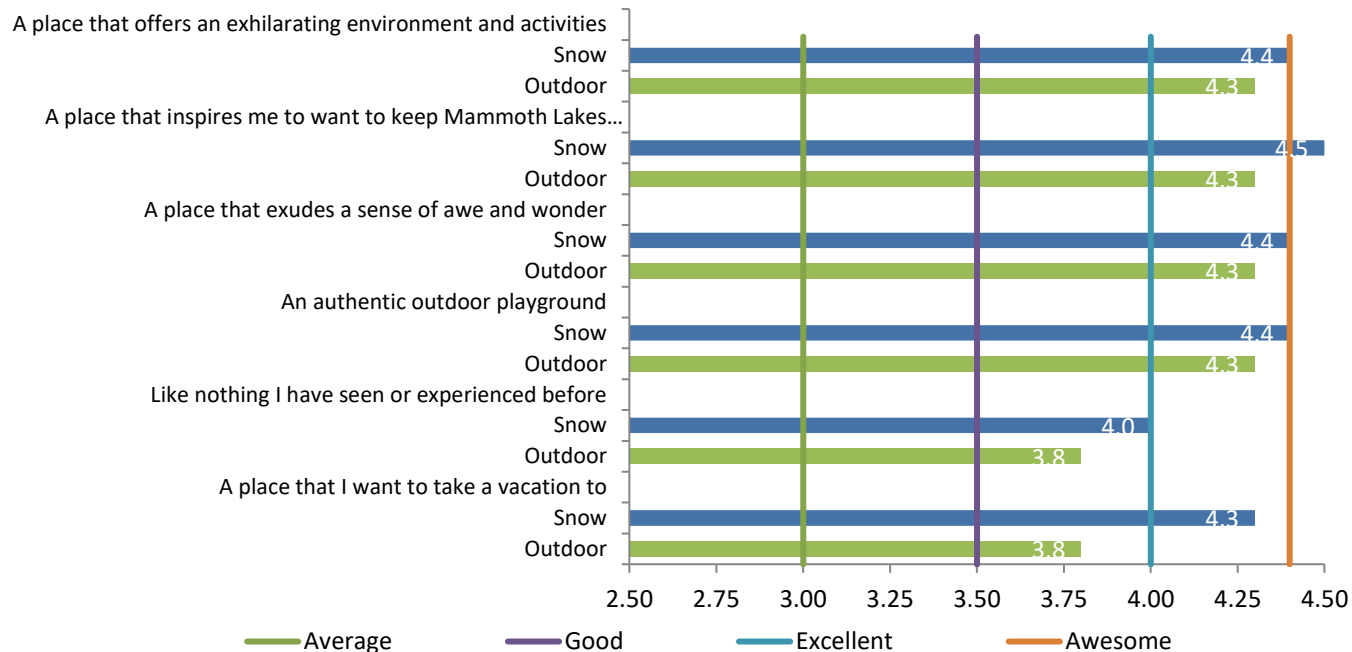


Reaction to Creative

Ratings can be compared to other winter/mountain destinations that SMARInsights measures. **The average creative rating for mountain destinations is 3.9 for communication attributes and 3.8 for “makes me want to visit.” So the ratings are better than most winter/mountain destinations also.**

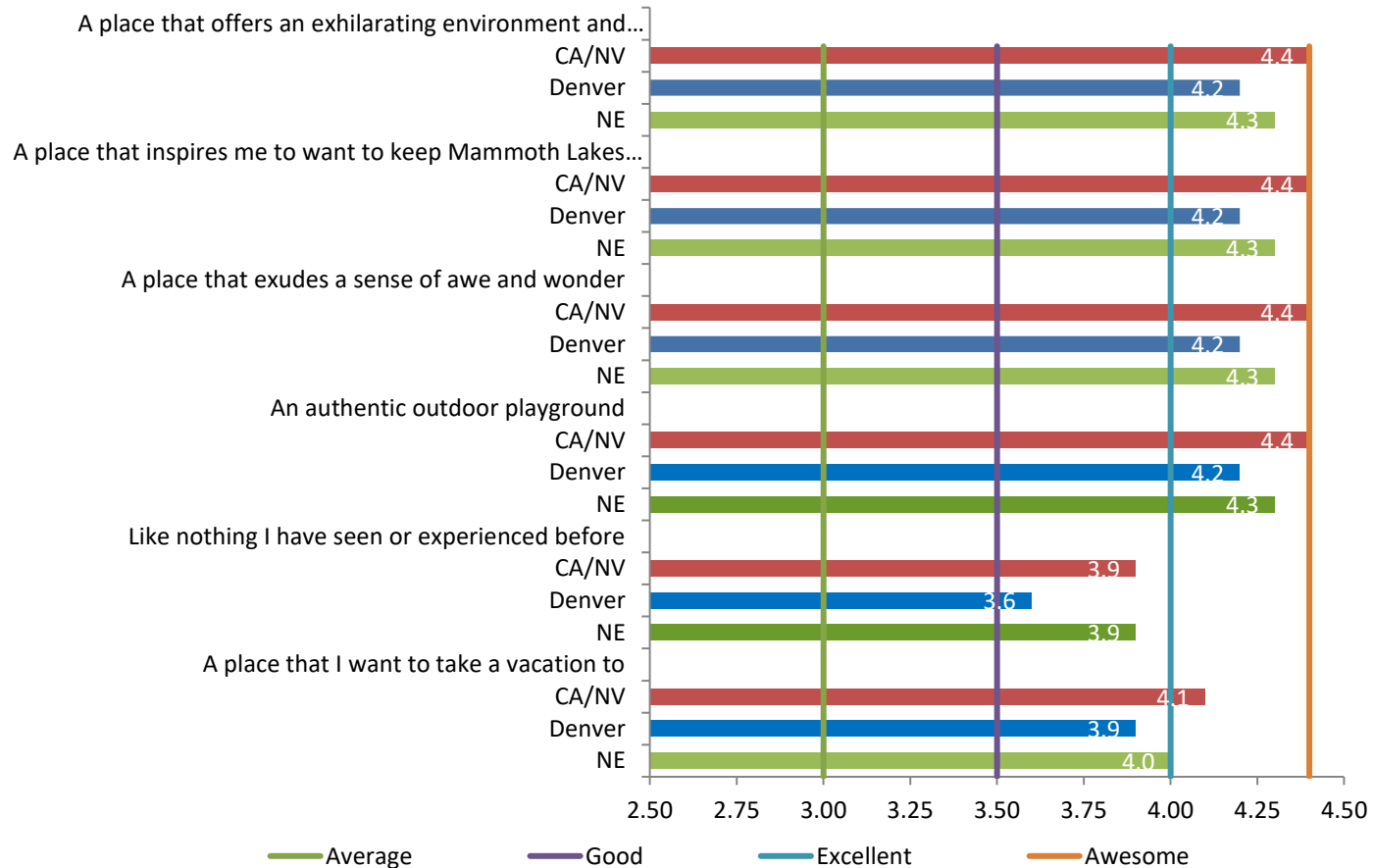
The attribute that is rated above the “awesome” benchmark is a place that inspires me to want to keep Mammoth Lakes beautiful. This highlights the ability of the campaign to promote sustainability.

These ads communicate that Mammoth Lakes is ... (Scale of 1-5)



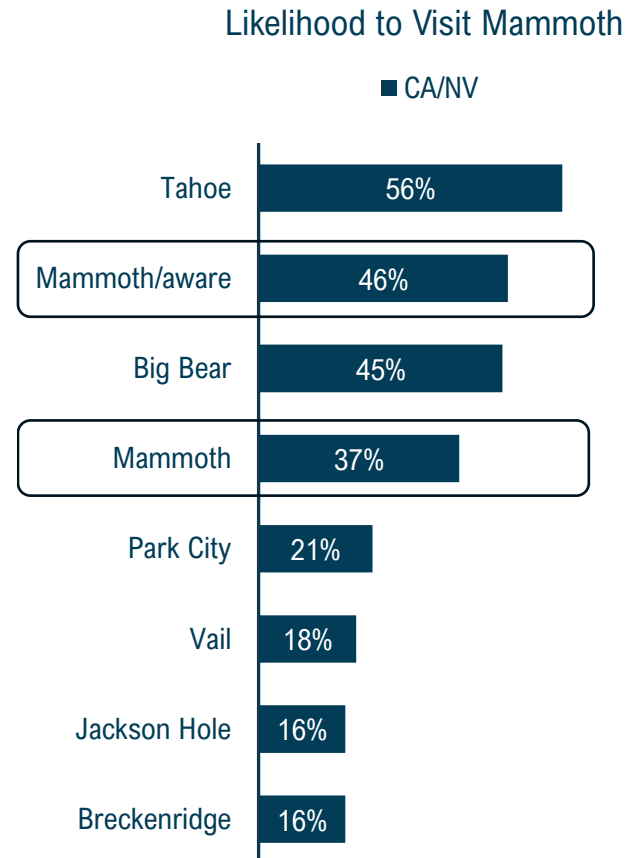
Reaction to Creative

These ads communicate that Mammoth Lakes is ... (Scale of 1-5)



Likelihood to visit – Snow Travelers California/Nevada

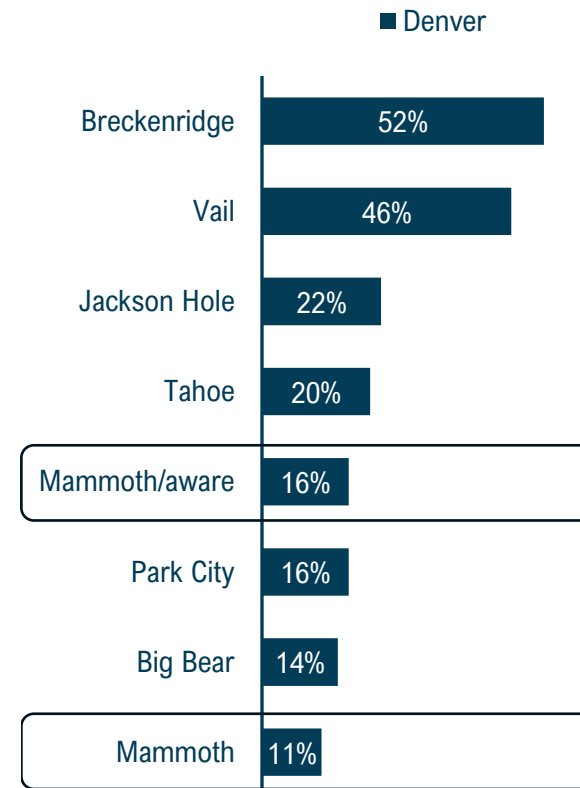
- In the California/Nevada market, Snow travelers are most likely to visit Tahoe, followed by Big Bear and then Mammoth.
- But ad recall pushes Mammoth into second place.
- There is obviously strong potential to influence Snow travelers in this market.



Likelihood to visit – Snow Travelers Denver

- In the Denver market, Snow travelers are most likely to visit Breckenridge, Vail, and Jackson Hole. They are the least likely to visit Mammoth.
- Ad recall pushes Mammoth above Big Bear and Park City.
- This audience is much more likely to visit ski destinations nearby rather than travel to California.

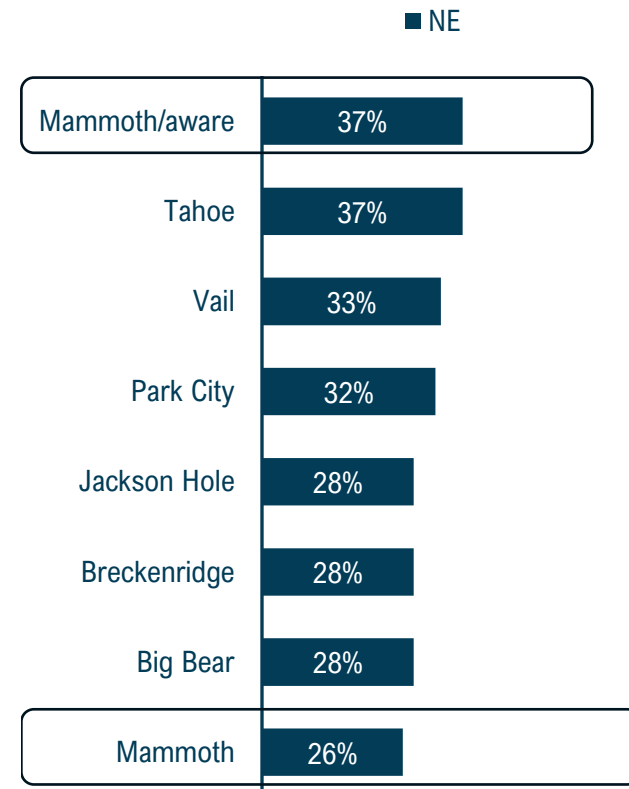
Likelihood to Visit Mammoth



Likelihood to visit – Snow Travelers Northeast

- In the Northeast, Snow travelers are mostly likely to visit Tahoe, followed by Vail and Park City. They are least likely to visit Mammoth.
- But the advertising has the strongest impact here. It pushes consideration of Mammoth from last to tied with Tahoe for first.
- In this market, the various destinations are more competitive (the likelihood is more similar across destinations), and therefore advertising is critical to gain usage.

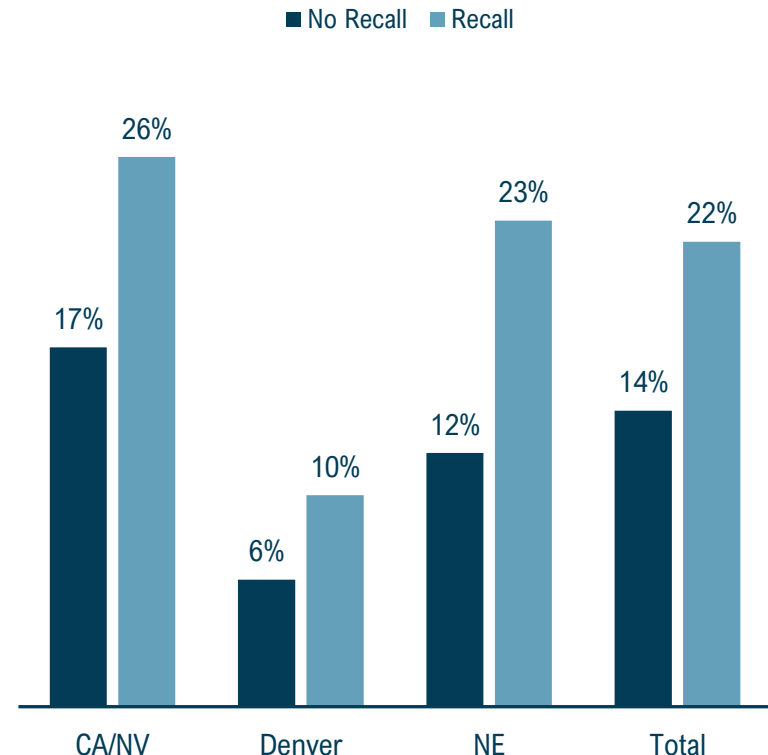
Likelihood to Visit Mammoth



The advertising does increase awareness of air service

- One goal of the campaign was to educate consumers about air service options, and those who recall the campaign are more aware.
- Overall, the ad-aware consumers are also much more likely to be aware of the air service options.
- The impact is least in the Denver market.

Impact of Ads on Awareness of Air Service



The ads improve consumers' image of the destination

- This page compares image ratings among those with and without recall of the MLT winter ads. The Snow audience and Outdoor audience are considered separately. But the impact is actually similar for both groups. **The strongest impact is highlighting a destination that values sustainability and stewardship.**
- The ads have a stronger impact on the Snow audience, and they are already more positive about the destination. But the ads speak to both audiences.

Snow Target	No Recall	Recall	Difference
Is a destination that values sustainability and stewardship	3.7	4.0	0.3
Is unpretentious and down-to-earth	3.7	4.0	0.3
Is like nothing I have ever seen before	3.5	3.8	0.2
Offers an abundance of year-round activities right outside your door	3.9	4.1	0.2
Has an abundance of diverse terrain	3.9	4.1	0.2
Is majestic in scale and awesome in its natural beauty	4.0	4.2	0.2
Is an authentic outdoor playground	4.0	4.2	0.2
Is a place I want to protect or keep beautiful	4.2	4.3	0.1
Offers an extraordinary sense of awe and feeling of exhilaration	3.9	4.0	0.1
Is rustic and rugged	3.7	3.8	0.1
Is a destination for outdoor adventurers	4.1	4.2	0.1

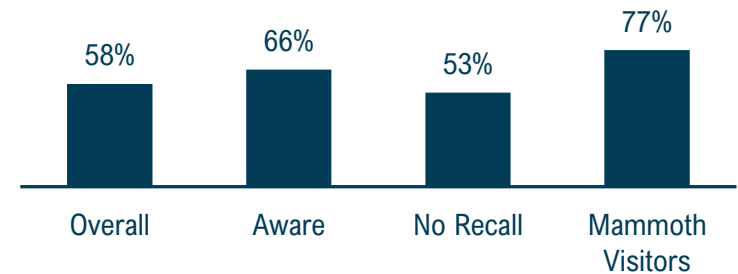
Outdoor Target	No Recall	Recall	Difference
Is a destination that values sustainability and stewardship	3.5	3.7	0.2
Offers an extraordinary sense of awe and feeling of exhilaration	3.7	3.9	0.2
Offers an abundance of year-round activities right outside your door	3.7	3.8	0.1
Is unpretentious and down-to-earth	3.5	3.7	0.1
Is like nothing I have ever seen before	3.4	3.6	0.1
Has an abundance of diverse terrain	3.7	3.8	0.1
Is a place I want to protect or keep beautiful	4.0	4.1	0.1
Is majestic in scale and awesome in its natural beauty	3.8	3.9	0.1
Is an authentic outdoor playground	3.8	3.9	0.1
Is a destination for outdoor adventurers	3.9	4.0	0.1
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Importance of Sustainability

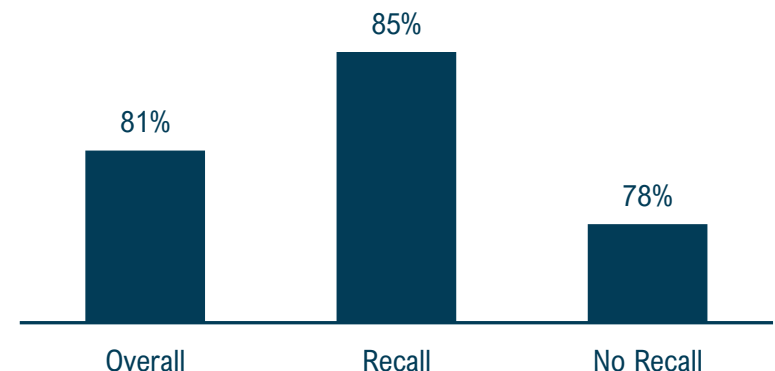
The targeted audience feels that sustainability is important:

- Almost 60% say it is important to them to consider the sustainability and stewardship efforts of a destination when selecting where to visit. Among actual Mammoth visitors, 77% indicated that Mammoth's policies were important in choosing the destination.
- More than 80% say it is important to them to practice responsible tourism practices while in a destination
- It is also important to note that recall of Mammoth advertising supports these attitudes. More of those who recall the ads indicate that they value the destination choices/programs and that they practice responsible tourism in the destination.

Importance of Sustainability in Choose a Destination



Practicing Sustainability in the Destination



Spending

- It is noteworthy that the much smaller Snow audience spends considerably more on their trips to Mammoth compared to the Outdoor visitors.
- Spending is higher across the board, but especially for lodging, outdoor activities and shopping.

Trip Spending	Outdoor	Snow
Lodging	\$656	\$1,421
Dining out/nightlife	\$161	\$265
Groceries	\$140	\$166
Outdoor activities/attractions	\$106	\$316
Shopping	\$118	\$203
Entertainment such as shows, theater or concerts	\$37	\$75
Transportation within Mammoth Lakes	\$61	\$88
Other	\$55	\$66
Total	\$1,334*	\$2,599*
Average Trip Length	2.5	3.5
Spending per Night	\$534	\$743

*Expenditures are per travel party

Markets

- A review of interest in Mammoth by market highlights the strength of the California/Nevada market. The Northeast shows potential, especially among the Snow travelers.

Likelihood to Visit Mammoth

