



## **Mammoth Lakes Tourism**

**Winter 2023 Advertising Effectiveness Research**

**June 2023**

# Background & Objectives

- Mammoth Lakes Tourism (MLT) has partnered with Strategic Marketing & Research Insights (SMARInsights) since 2013 to conduct advertising effectiveness measures. There have been variations in the methodology over time to address additional research needs, but this study returns to focusing on the impact of the winter marketing campaign in generating incremental visitation and spending in Mammoth Lakes.
- 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

# Insights

- 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.
- The campaign effectively targeted both consumers who take snow/ski vacations and outdoor travelers. This is important because both groups contributed to the ROI:
  - Snow Travelers are a small, but powerful audience. They are more likely to see the advertising, and the incremental lift is strong – 8.4%. They also spend significantly more while in Mammoth. As a result, this audience generated 143,000 incremental trips and \$372 million in influenced spending.
  - Outdoor Travelers are less likely to see the ads and be influenced. The lift for this audience was 4.1%. But they are a much larger audience, so they represented slightly more incremental trips – 149,000. But their spending while in Mammoth is lower, so the influenced visitor spending was \$199 million.
- The creative for this effort gets very positive ratings from consumers – and obviously has a positive impact on attitudes and behavior. Comparison to the past campaign shows some great improvement, with significantly more positive responses and fewer negative/neutral responses.
- A key finding was that the strongest rated attribute indicated that the ad was extremely effective in inspiring people to want to keep Mammoth beautiful. Additionally, the advertising positioned Mammoth as a destination that cares about sustainability, with ad aware consumers giving Mammoth more credit in this area.

# Insights

- The media buy reached more than 5.3 million Snow and Outdoor travelers. The campaign as a whole was efficient and the \$0.30 to reach an aware household is more efficient than the national winter benchmark of \$0.32. The campaign is not as efficient as other ski/snow campaigns, but the Denver market is challenging, impacting overall efficiency.
- Denver does not generate the same levels of incremental visitation. This market has low awareness and interest in Mammoth. While advertising has some impact in increasing likelihood to visit, this market does not hold the same value as other target markets.
- Mammoth visitors put a high value on sustainability, and many consider this when choosing a destination. When consumers were asked about their behavior in a destination, their efforts toward sustainability tend to be more focused on supporting local businesses rather than specific sustainability initiatives. But this interest can be leveraged to encourage more targeted, meaningful behaviors.
- Mammoth visitors want to connect with nature, share meaningful moments with loved ones, and have unique and interesting experiences. Many are repeat visitors and come because of past positive experiences.
- The destination website ([visitmammoth.com](http://visitmammoth.com)) was cited as the second most-used source of visitor information (after friends & family). In addition, 15% of the visitors follow Mammoth on social media and 6.5% used the visitor guide. The majority using the visitors guide used it while making the decision to visit.

# Methodology

- The SMARInsights' methodology for measuring advertising effectiveness relies on respondents viewing the actual ads. With this methodology, an email with the survey link is sent to a qualified list of potential participants and they are asked to complete the survey.
- Qualified households are surveyed to gauge travel behaviors, perceptions of the destination, and – at the end of the survey – awareness of the advertising.
- Past research focused on outdoor travelers (as defined below), but there was a desire to focus more specifically on snow/ski travelers. We did find that almost all snow/ski travelers are also outdoor travelers. Only 0.3% are only ski travelers. In the current study, half of the sample was snow/outdoor travelers and half was outdoor/non-snow travelers. For the purposes of the reporting, **Snow** refers to snow and snow/outdoor travelers and **Outdoor** refers to outdoor travelers who are not also snow travelers.

## Qualified Respondents

### Traveling household

- Households that typically take at least one overnight leisure trip/year

### Outdoor Travelers

- Enjoy passive or active outdoor activities and/or
- Enjoy being outdoors in nature

### Snow Travelers

- I engage in skiing, snowmobiling and/or other outdoor winter activities
- Have been on a snow vacation in the past 2 years

# Methodology

- The advertising effectiveness methodology requires respondents to view the actual ads in order to gauge awareness, so SMARInsights developed and programmed an online survey. National sample vendors provided a link to the survey to potential respondents across the country.
- SMARInsights conducted 2,944 surveys with Snow and Outdoor travelers between May 12<sup>th</sup> and 30<sup>th</sup> 2023.
- Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the results of the survey. A copy of the questionnaire used for data collection appears in the Appendix.

Ad Effectiveness Research	
CA+NV	1,615
Denver	204
Northeast	1,126
<b>TOTAL</b>	<b>2,944</b>

Ad Effectiveness Research	
Outdoor travelers only	1,456
Outdoor/Snow travelers	1,488
<b>TOTAL</b>	<b>2,944</b>

# 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.
- The focus of the campaign was *The Real Unreal* advertising.

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.



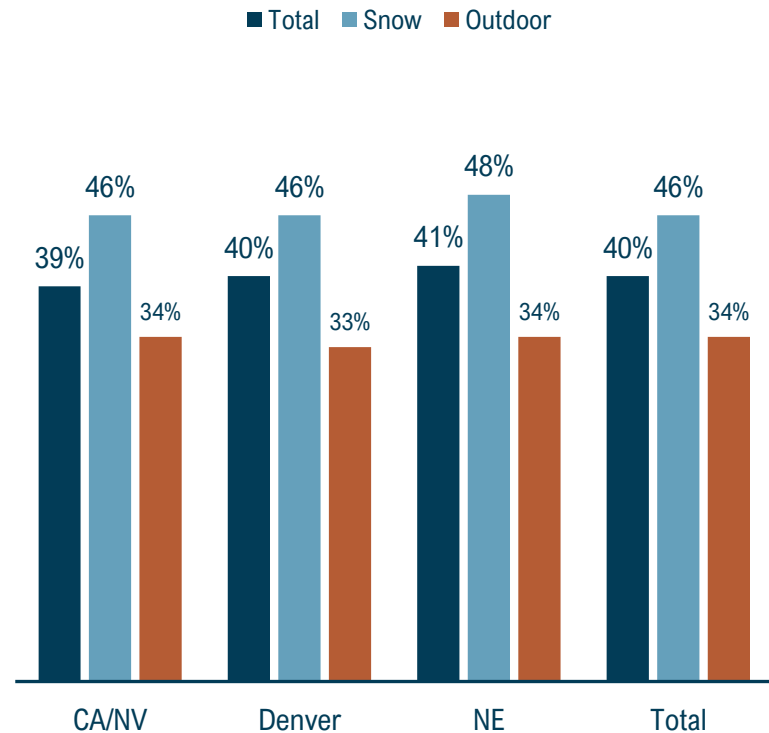
# Campaign Awareness & Evaluation



# Awareness

- Overall, 40% of the consumers recalled the Mammoth Lakes winter ads.
- Recall among the Snow audience was higher at 46%, compared to 34% for the Outdoor audience. While recall among the Outdoor audience is lower, the ads are clearly reaching this audience, too.
- The differences in recall across markets were very small. The major difference was being a Snow traveler.

## Recall of Winter Campaign



# Awareness

- It is important to understand that while recall was higher among the Snow audience, it is a very small group.
- The campaign generated 5.3 million aware households and only 1.7 million were Snow travelers. The other 3.6 million were among Outdoor travelers. As will be shown later, the size of the audience is only one consideration. The travel and spending behavior of these audiences differs too.
- The largest group of aware households was in California/Nevada, followed by the Northeast. Denver generated only 365,000 aware households – and only 116,000 aware Snow target.

Market	Aware Snow	Aware Outdoor	Total
CA/NV	920,733	1,987,114	2,907,847
Denver	116,205	249,281	365,486
NE	669,008	1,398,351	2,067,359
Total	1,705,946	3,634,746	5,340,692

# Efficiency

- A good way to consider efficiency is to look at the cost to generate an aware household.
- With the Mammoth campaign, it is helpful to look at the overall efficiency in reaching the targeted audiences, as well as the efficiency in reaching the Snow/Ski audience specifically.
- For the campaign as a whole, the cost was \$0.30 to reach each household, which is slightly more efficient than the national benchmark of \$0.32.
- For ski/snow campaigns, the national benchmark\* is \$0.54. At \$0.94, the Mammoth campaign is not as efficient. It is noteworthy that the buy in California/Nevada is more efficient than the national average. The spending, especially in Denver, is bringing down the overall efficiency. Given this, the value of Denver and its contribution to visitation will be explored in more detail.

Market	Total	Media	CPH
CA/NV	2,907,847	\$427,024	\$0.15
Denver	365,486	\$374,098**	\$1.02
NE	2,067,359	\$691,400	\$0.33
Total	5,340,692	\$1,596,449	\$0.30

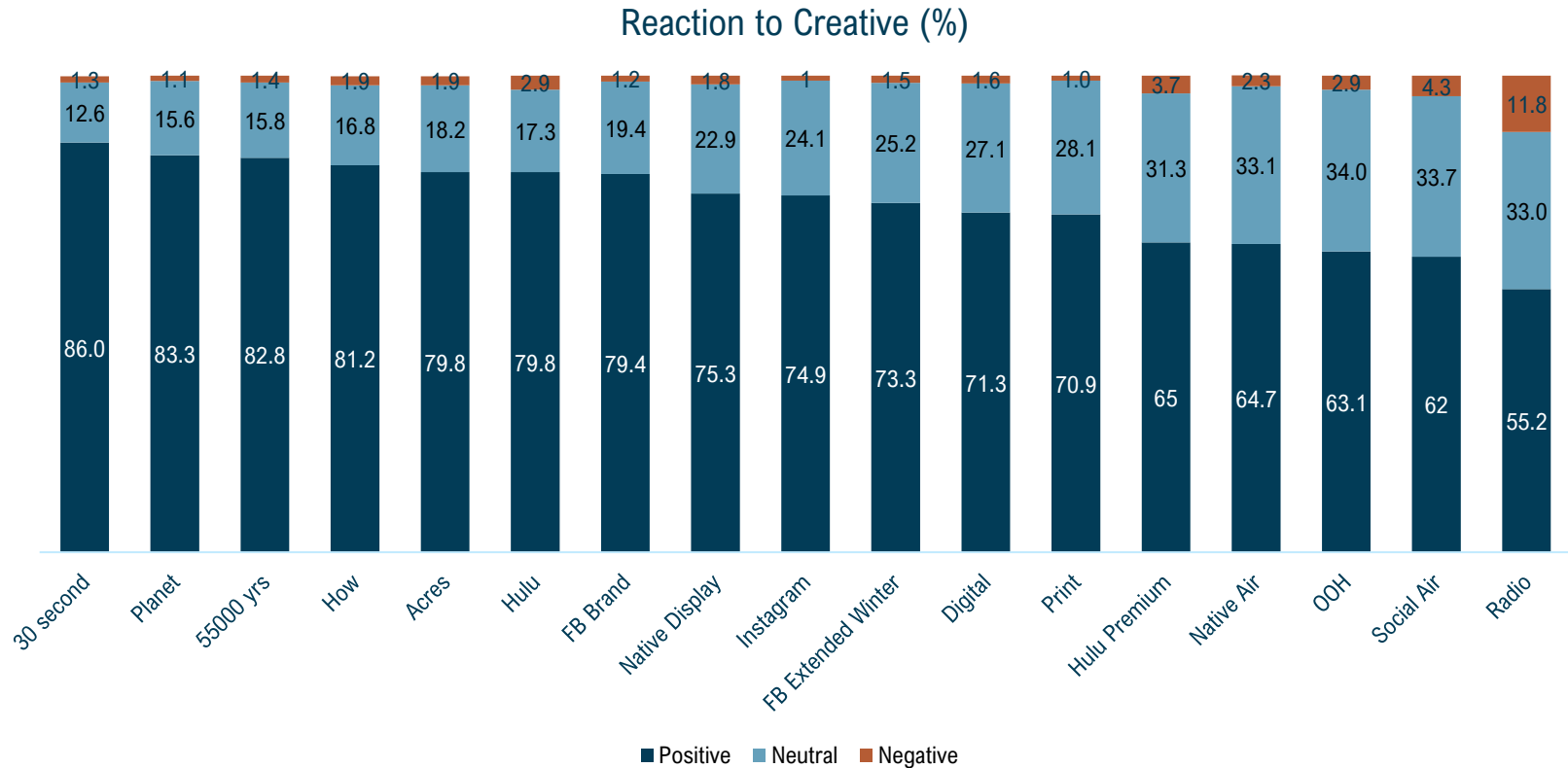
Market	Aware Snow	Media	CPH
CA/NV	920,733	\$427,024	\$0.46
Denver	116,205	\$374,098**	\$3.22
NE	669,008	\$691,400	\$1.03
Total	1,705,946	\$1,596,449	\$0.94

\*SMARInsights measures ski/snow focused campaigns for a number of states and specific destinations. Since these campaigns are more focused and targeted the benchmarks are different. The winter benchmark looks at the average across specific winter focused advertising efforts to provide a more meaningful comparison.

\*\* For Denver the cost for the airport advertising (\$103,927) was not included, as this reaches more people outside Denver and not necessarily Denver residents.

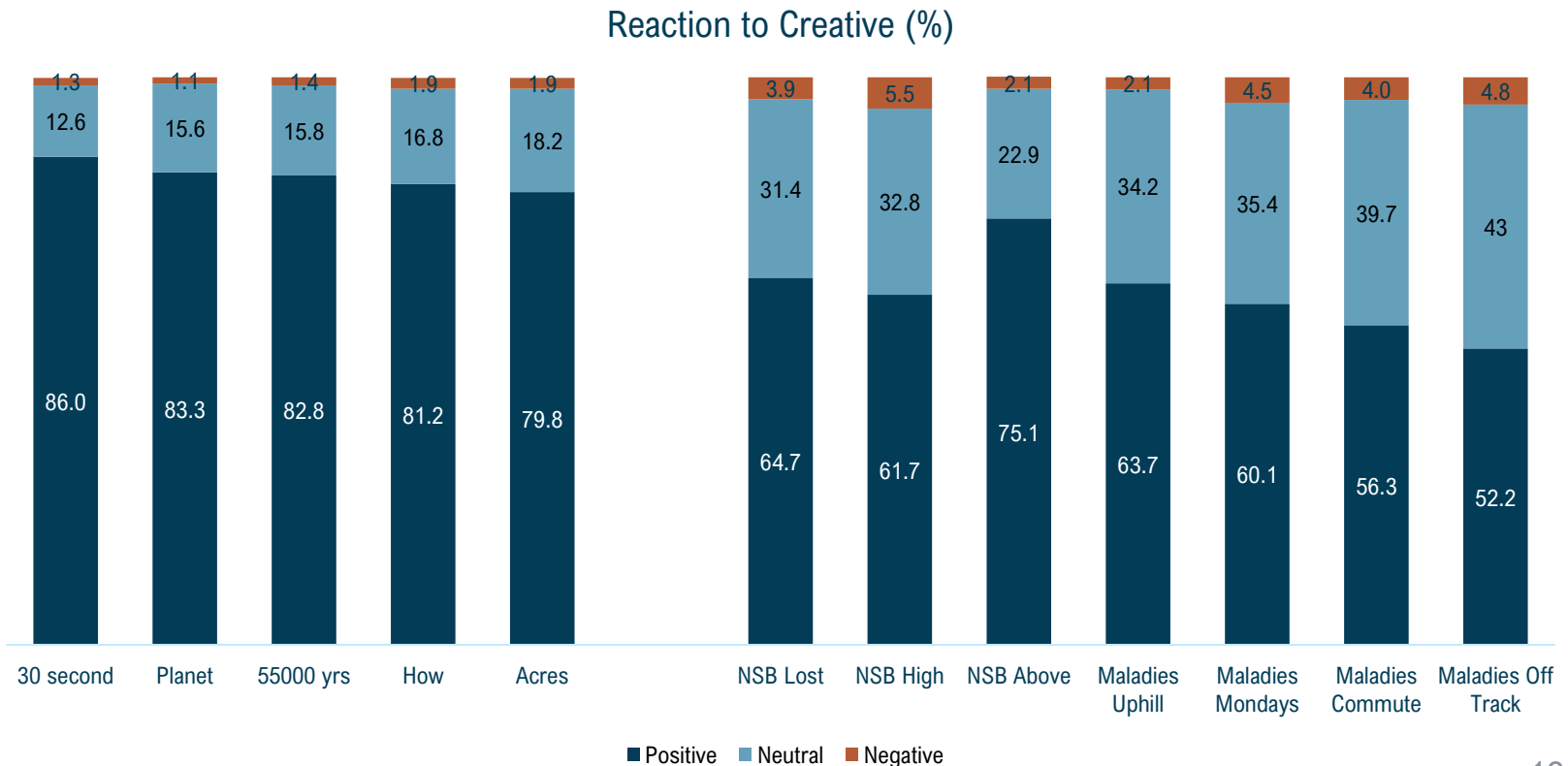
# Reaction to Unreal Creative

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.



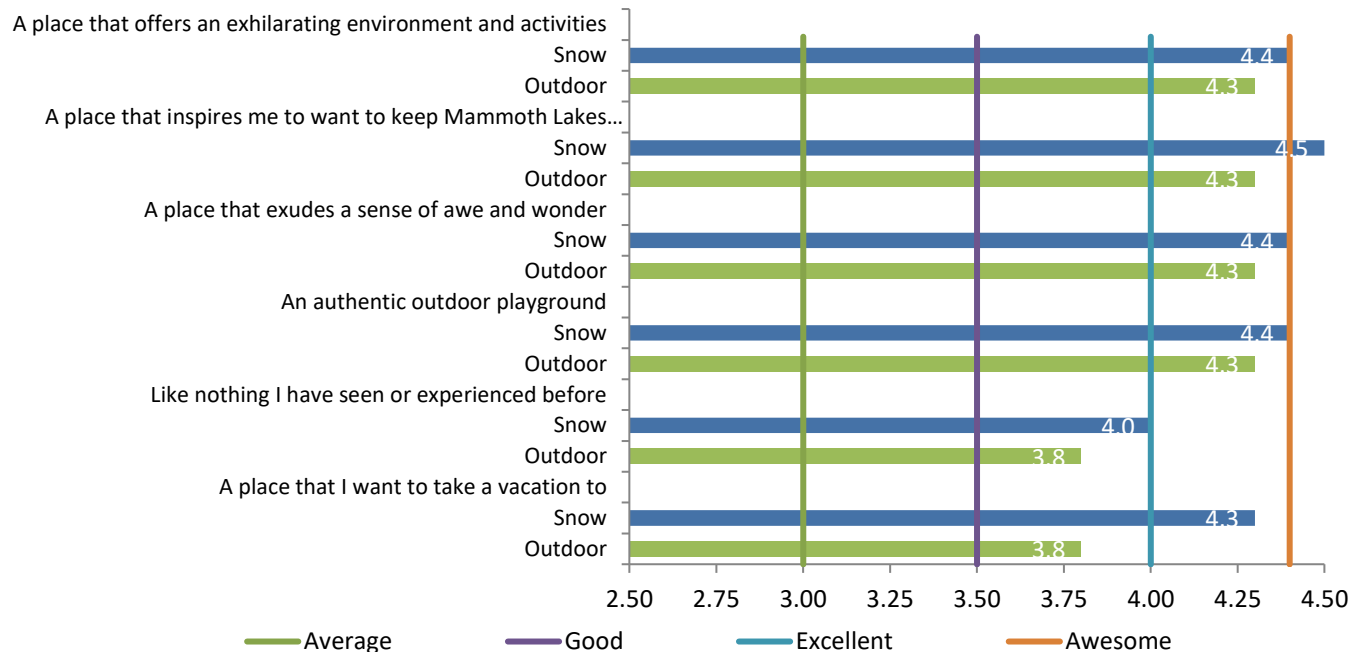
# Reaction to Creative

Consumers also rated the overall campaign using a number of attributes and a 5-point scale. All of the ratings for the Snow audience are in the top 10% of ads evaluated by SMARInsights.

The ratings among the Outdoor audience are generally in the top 10% in terms of what the ads communicate. They are in the top 25% for generating interest in visiting. **The only 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.**

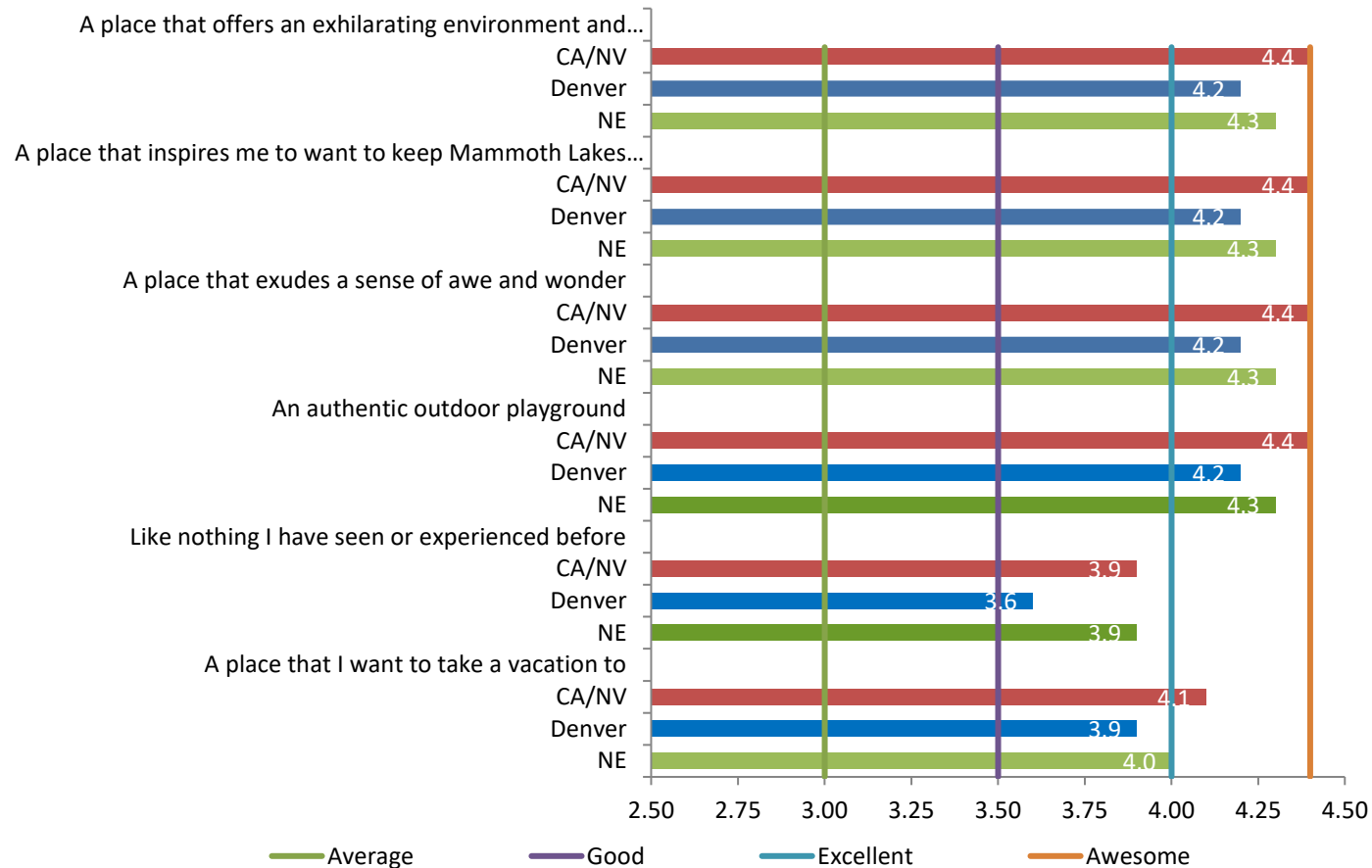
These ratings can also be compared to other winter/mountain destinations that SMARInsights measures. The average creative rating for mountain destinations is 3.9 for communication attributes and 3.8 for “makes me want to visit.” So the ratings are better than most winter/mountain destinations also.

## 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)



A review of the ratings by market also highlights that the message is more effective in California/Nevada and least effective in Denver.

In Denver, the ad gets lower ratings overall and especially for “like nothing I have seen or experienced before” and “a place that I want to take a vacation to.”

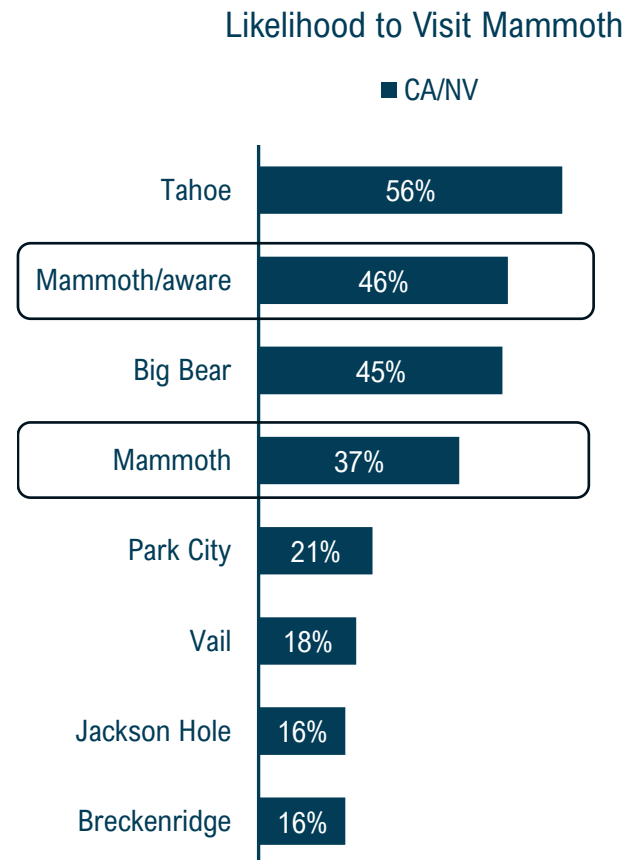
For people in Denver, there is less differentiation, and the messaging of the advertising is less meaningful.

# Campaign Impact



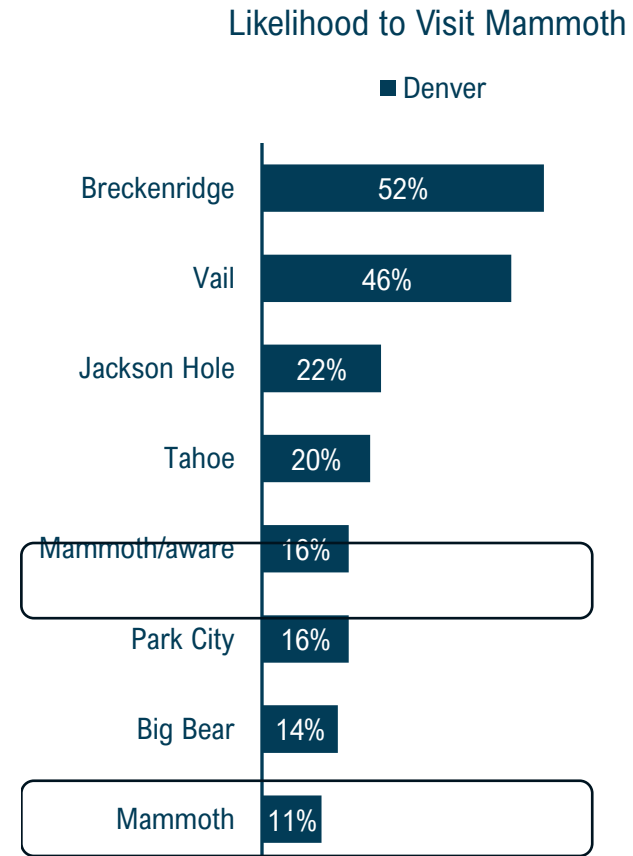
# Likelihood – Snow Travelers California/Nevada

- 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 – Snow Travelers Denver

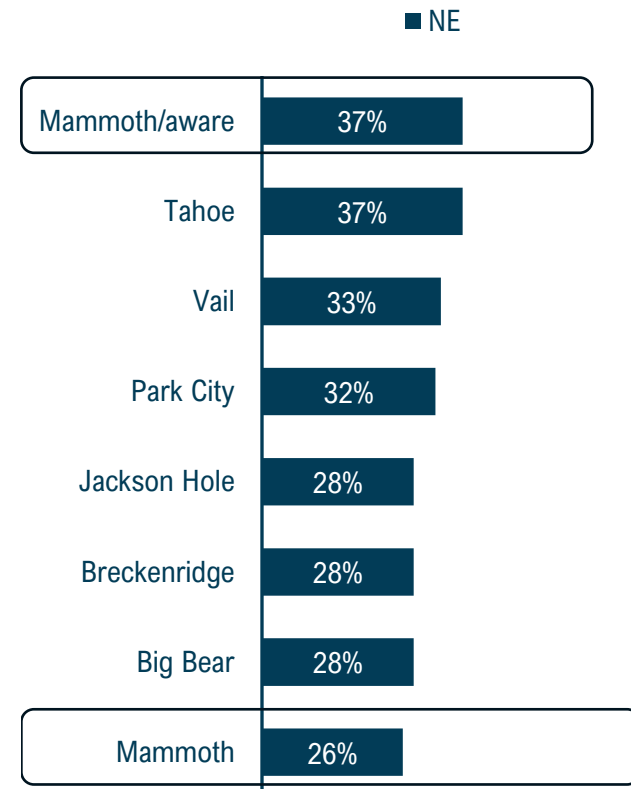
- In the Denver market, Snow travelers are most likely to visit Breckenridge, Vail, and Jackson Hole. They are the least likely to visit Mammoth.
- Ad recall pushes Mammoth above Big Bear and Park City.
- This audience is much more likely to visit ski destinations nearby rather than travel to California.



# Likelihood – Snow Travelers Northeast

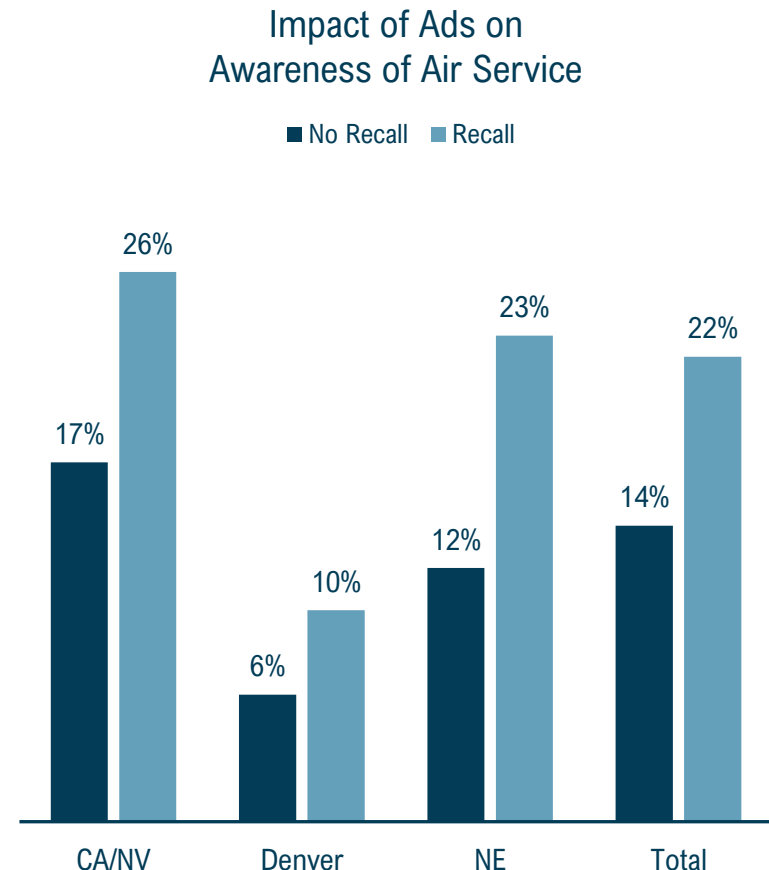
- In the Northeast, Snow travelers are mostly likely to visit Tahoe, followed by Vail and Park City. They are least likely to visit Mammoth.
- But the advertising has the strongest impact here. It pushes consideration of Mammoth from last to tied with Tahoe for first.
- In this market, the various destinations 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.



# The ads improve consumers' image of the destination

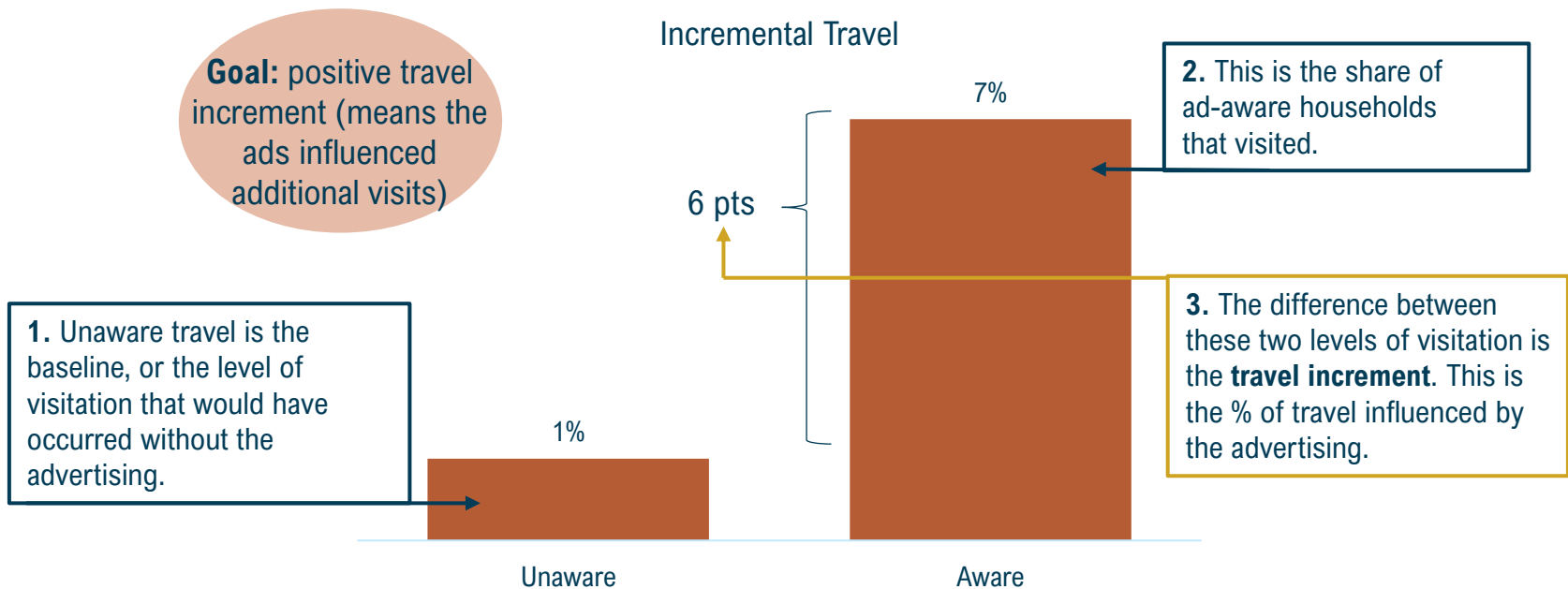
- This page compares image ratings among those with and without recall of the MLT winter ads. The Snow audience and Outdoor audience are considered separately. But the impact is actually similar for both groups. **The strongest impact is highlighting a destination that values sustainability and stewardship.**
- 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
Is rustic and rugged	3.6	3.7	0.0

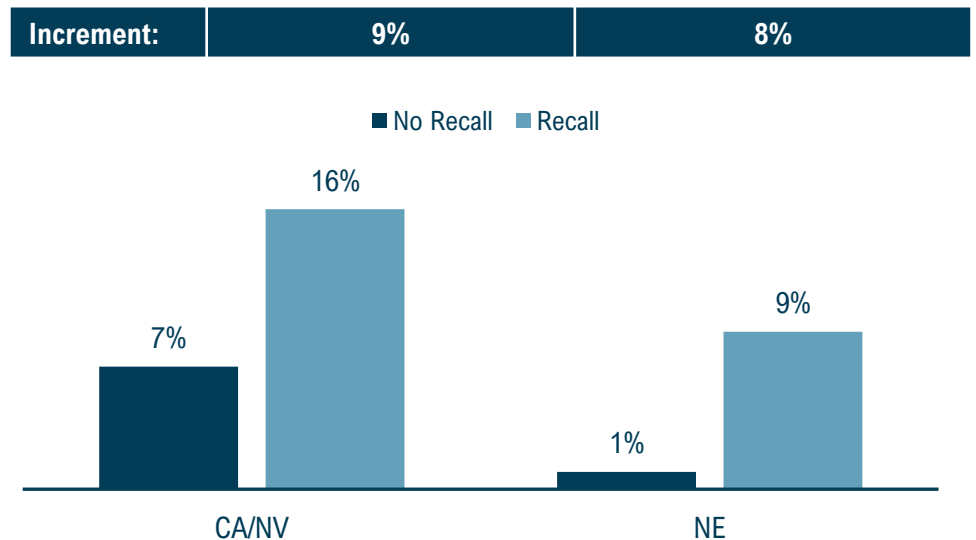
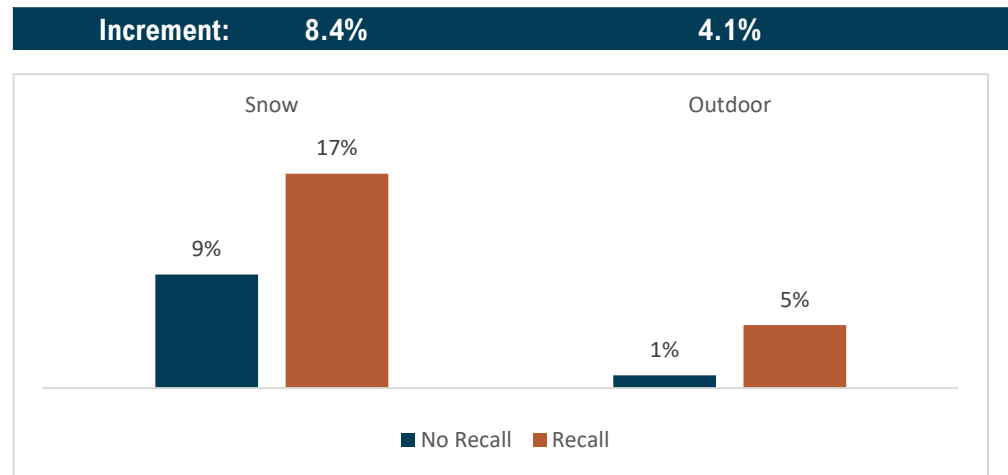
# Incremental Travel Measure

- Measuring incremental travel is the key to producing a conservative measure of advertising impact. It is also the industry standard, used by most destinations measuring ROI.



# Advertising generated additional travel from both Snow and Outdoor audiences

- It is useful to understand how the advertising influenced different groups of consumers – and the level of lift from these different groups.
- 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 – but no incremental travel from Denver. In fact, there was almost no visitation at all from Denver. The lift was slightly higher in the California/Nevada markets, but almost as strong in the Northeast.



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

- The overall results of the campaign were strong, with an ROI of \$358.
- The impact of the Snow target is large – given the small size of the audience. But both the increment and the trip spending are strong with this target. As a result, this audience is just a third of the aware households but generates two-thirds of the influenced visitor spending.
- The Outdoor target is a much larger audience, but their increment and trip spending are lower. Still, they generate 35% of the influenced visitor spending.

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



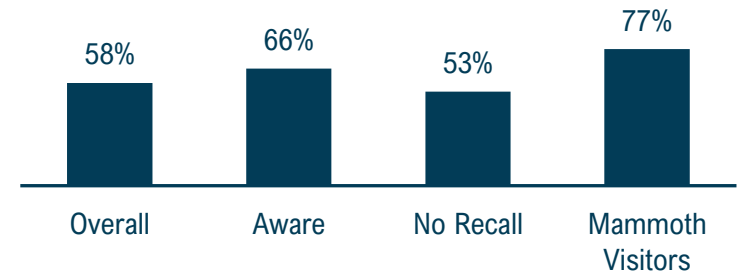
# Tactical Issues

# Importance of Sustainability

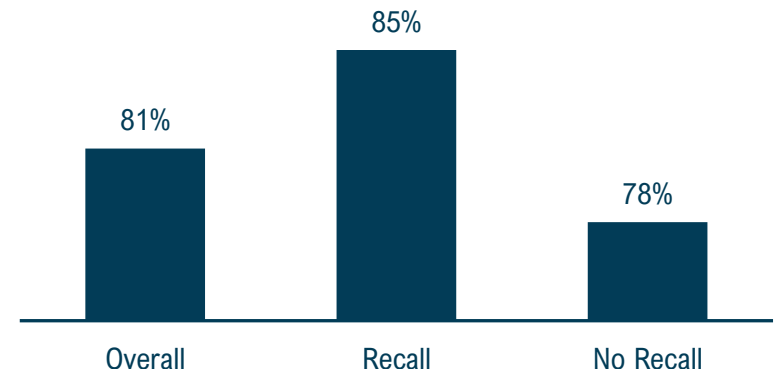
The targeted audience feels that sustainability is important:

- 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



# Sustainability

- The most popular responsible travel behavior relates to focusing on local food and culture and supporting local businesses. Most indicate that these are choices they make.
- About a third make optimal use of environmental resources and take public transportation. The percentage that take public transportation is higher among the ad aware – 38% vs 34%.
- About a quarter say no to single-use plastic and stay in eco-friendly accommodations.



# Visitor Motivations

- Visitors come to Mammoth Lakes for a variety of reasons – with the strongest being a desire to connect with nature. Escaping stress and restoring a sense of harmony and balance are also cited.
- Other motivations include bonding with loved ones and having unique and interesting experiences.

Motivation for Visiting (Visitors Chose only one – the main motivation)	%
Allowed me to connect with nature	15%
Allowed me to enjoy special moments together with my loved ones	11%
Provided me with unique and interesting experiences	10%
Helped me to escape from everyday stress and pressure and find a sense of relaxation	8%
Restored my sense of harmony and balance	8%
Allowed me to let go and feel completely carefree	7%
Allowed me to strengthen relationships with those close to me	7%
Gave me a sense of exhilaration	6%
Challenged me to try something new	5%
Helped me to meet new people and create memories	5%
Allowed me to immerse myself in the local life and culture	4%
Broadened my knowledge & enriched my understanding of the world	4%
Gave me time out to think and regain control of my life	3%
Allowed me to feel organized and avoid surprises	2%

# Visitor Motivations

- Most visitors are already familiar with Mammoth Lakes (84%).
- 40% are repeat visitors who are excited to return.
- 21% have always wanted to go to Mammoth.
- A significant number of respondents have family or friends in the area, too.

Reason for Familiarity	%
Been many times and know it will deliver the vacation I want	40%
I've always wanted to go there	21%
Have family and friends there	20%
Have family or friends who own property there	13%
I was attending a planned event (tournament, meeting, wedding, etc.)	9%
Used to live in the area	5%
Own a home there	1%

There is overlap between “have friends/family there and friends/family own property there. Overall, 30% have friends/family in the area

# Spending

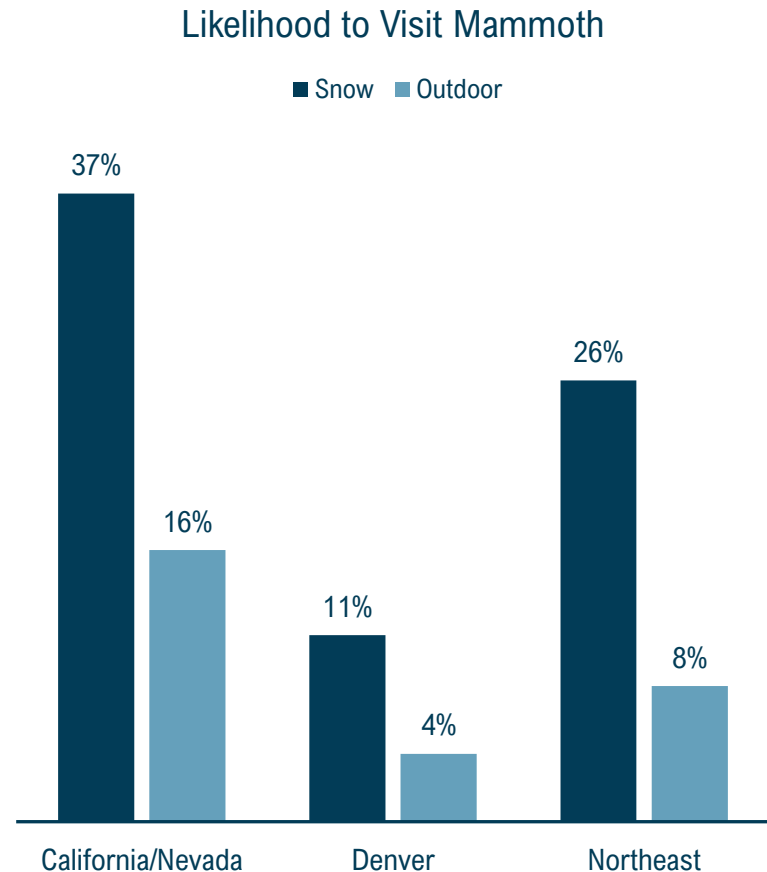
- It is noteworthy that the Snow audience spends considerably more on their trips to Mammoth compared to the Outdoor visitors.
- Spending is higher across the board, but especially for lodging, outdoor activities and shopping.
- Since this audience is much smaller, it is important that they contribute more once they are in the destination.

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
<b>Total</b>	<b>\$1,334*</b>	<b>\$2,599*</b>
Average Trip Length	2.5	3.5
<b>Spending per Night</b>	<b>\$534</b>	<b>\$743</b>

\*Expenditures are per travel party

# Markets

- A review of interest in Mammoth by market highlights the strength of the California/Nevada market and the weakness of Denver. The Northeast shows potential, especially among the Snow travelers.
- Denver has a low likelihood to visit, even among Snow travelers. Given that the population is low (compared to the other two market groups) and the likelihood is low, this market is unlikely to generate much travel to Mammoth.
- While likelihood among the Outdoor travelers is lower, this is a large audience.



# Information Sources

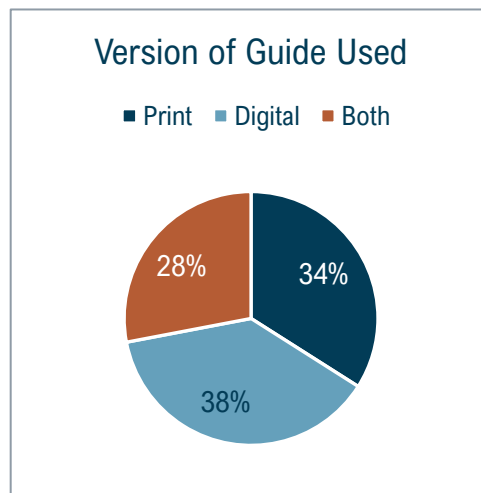
- In planning their trip, visitors used a wide variety of sources of information.
- It is noteworthy that after friends and family, the second most-used source was the visitmammoth.com website.
- Other important sources included social media, online travel advice websites, video platforms, resort website and advertisements.

Information Used Planning Trip	Mean
Family or friends	42%
Destination website (www.visitmammoth.com)	37%
Social media (Facebook, Twitter, Instagram, etc.)	36%
Online travel advice websites (TripAdvisor.com, AAA.com, etc.)	34%
Video platform (YouTube, Vimeo)	31%
Resort website (mammothmountain.com)	25%
Advertisements (television, online, magazine, etc.)	20%
Travel guide, visitor planning guide	18%
Online traveler reviews	17%
Travel blog	15%
Ski-snowboard website	15%
Magazine and newspaper articles	13%
Other destination website (Mono County Tourism, Visit California, etc.)	13%
Guide books/websites like Frommer's or Lonely Planet	11%
Travel agent	9%
Did not gather information	8%
Airline ad	7%
Trade show	7%



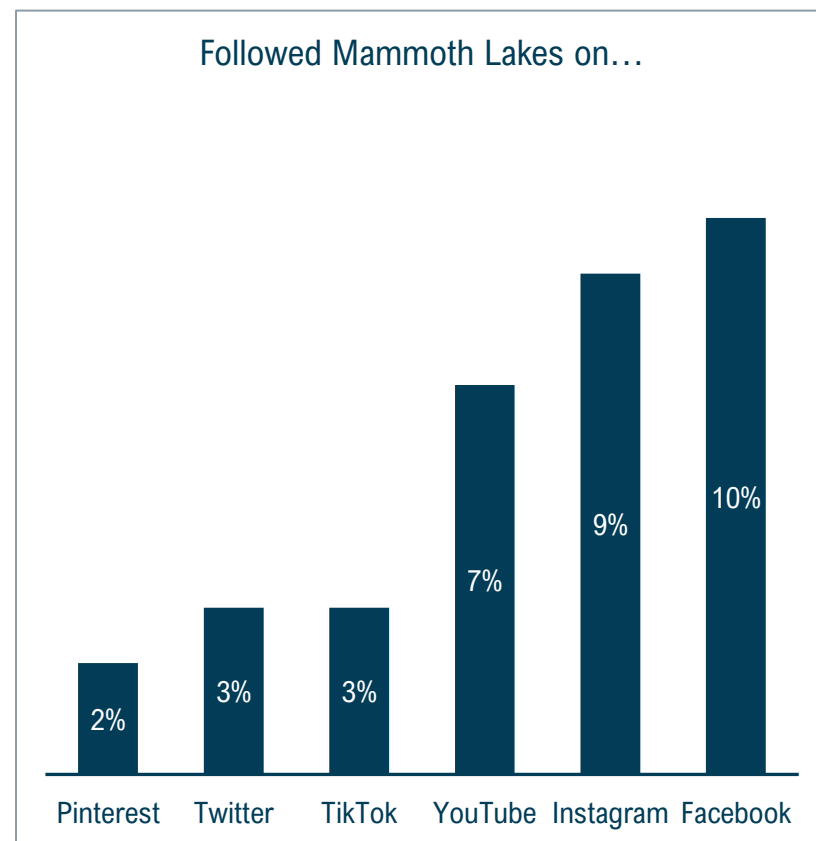
# Visitors Guide

- 6.5% of visitors used the Mammoth Lakes Visitor Guide.
- There was a mix of using both the print and digital guide, with 28% using both.
- 85% indicated the guide was “very useful” and only 1% indicated it was not useful.
- Most used it before they had decided to visit, while still considering places to go.



# Social Media

- 15% of the respondents indicated that they followed Mammoth Lakes on social channels.
- Facebook and Instagram are the most popular social channels.



# Appendix

# Reaction to Radio Creative

The radio creative did not achieve the 60% positive benchmark, and also had more than 10% negative. Those are the flags that suggest review of this creative.

Consumers who expressed a negative reaction were asked why and there is a clear theme – the whispering in the ad is annoying and irritating. Here's a small sampling of the verbatim comments:

“ Annoying repetitive whispers

Annoying sounding voice makes it creepy

Don't like the creepy whispering

Found it a little irritating with the unreal unreal voice in the background

All that whispering is annoying. And the whole real, unreal think is not good ”

# Questionnaire

Mammoth Lakes, California (Shipyard)  
2022-23 Ad Effectiveness WINTER

[COMPETITIVE SET]	Breckenridge, CO
Mammoth Lakes, CA	Park City, UT
Big Bear Mountain, CA	Jackson Hole, WY
Lake Tahoe, CA	Vail, CO

ZIP. What is your ZIP code? \_\_\_\_\_

S1. Who in your household is responsible for making decisions concerning travel destinations?

- Me
- Me and my spouse/partner
- My spouse/partner → [TERMINATE]

Please indicate which of the following describe you.

[ROTATE]	YES	NO
I use video streaming services like Prime Video, Disney+, AppleTV+, Netflix, HBO Max, or Hulu		
I engage in skiing, snowmobiling and/or other outdoor winter activities		Quota 50% of sample per market
Have you been on a snow vacation in the past 2 years? (The vacation could have included skiing, snowboarding, other winter snow activities or just enjoying winter scenery.)		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		TERMINATE IF NO TO BOTH at end of screeners
I am currently planning or have already planned an upcoming leisure trip		
I regularly use social media such as Facebook, Twitter, Instagram, or TikTok		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		
I enjoy outdoor activities (passive or active)		[OUTDOOR TRAVEL SCREENERS 50%]
I enjoy being outdoors in nature		

TERMINATE IF NOT WINTER OR OUTDOOR ACTIVITIES – 50% each.

AGE. What is your age? \_\_\_\_\_ [IF UNDER 18 → TERMINATE AT END OF SCREENING QUESTIONS]

[END OF SCREENERS]

## COMPETITIVE SET QUESTIONS

Q1. How familiar are you with each of the following as a place to visit for a leisure trip?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
[INSERT COMPETITIVE SET]				

Q2. Which of these places would you most like to visit for a leisure trip?

ROTATE
INSERT COMP SET

Q3. Based on what you know or have heard, how would you rate each of the following as a place to visit for a leisure trip?

[ROTATE]	Poor	Fair	Good	Very good	Excellent
[INSERT COMPETITIVE SET]					

Q4. Which of these places have you visited in the past 12 months?

ROTATE
INSERT COMP SET

Q4A. [ASK IF VISITED IN Q4] Which of these places have you visited since December 2022?

ROTATE
INSERT COMP SET
None of these

Q5. How likely are you to visit each of these places in the next year for a leisure trip?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
[INSERT COMPETITIVE SET]					

# Questionnaire

Q6. How important are sustainability and stewardship efforts (a destination's practices around responsible tourism, such as conservation, recycling, etc.) in choosing the destinations you visit?

Not at all important	Slightly important	Neutral	Moderately important	Very important
----------------------	--------------------	---------	----------------------	----------------

Q7. How important is it to you to practice responsible tourism/travel practices while in a destination?

Not at all important	Slightly important	Neutral	Moderately important	Very important
----------------------	--------------------	---------	----------------------	----------------

Q8a. While visiting a destination do you take any of the following actions? Select all that apply.

- Stay in eco-friendly accommodations
- Make optimal use of environmental resources
- Take public transportation
- Respect the culture of local communities
- Buy from and supporting local businesses
- Travel slow
- Say NO to single-use plastic
- Eat local food
- Other (Specify)

Q8. [UNAIDED BRAND AWARENESS] Now we'd like you to rate two of these destinations. How much do you agree that [RATE MAMMOTH LAKES AND LAKE TAHOE; ROTATE DESTINATIONS] ...?

[ROTATE]	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Is a destination that values sustainability and stewardship					
Is a place I want to protect or keep beautiful					
Is an authentic outdoor playground					
Is a destination for outdoor adventurers					
Offers an abundance of year-round activities right outside your door					
Has an abundance of diverse terrain					
Is majestic in scale and awesome in its natural beauty					

[ROTATE]	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Offers an extraordinary sense of awe and feeling of exhilaration					
Is rustic and rugged					
Is unpretentious and down-to-earth					
Is like nothing I have ever seen before					

ASK OF ENTIRE BASE.

Q6A\_1. Are you aware of air service options to access the Mammoth Lakes? YES/NO

VISITOR ANSWERED YES TO Q4A\_1

VISITATION

T1. When during the following months did you travel to Mammoth Lakes for a leisure trip? [SHOW MONTHS DECEMBER 2022 – MAY 2023] *Select all that apply.*

T1a. Are you an IKON pass holder?

- YES
- NO

Please tell us about your leisure trip to Mammoth Lakes in [MONTH YEAR]. [ONLY ASKING ABOUT FIRST TRIP FROM T1 TRIP]

T2. How important were sustainability and stewardship efforts in your destination choice for this trip?

Not at all important	Slightly important	Neutral	Moderately important	Very important
----------------------	--------------------	---------	----------------------	----------------

T3. Approximately, how many times have you visited Mammoth Lakes before your visit [SHOW FIRST MONTH SELECTED]?

- None, this was my first trip [FIRST TIME VISITOR]
- Enter approximate number of trips prior to this trip

T4. When people travel for leisure, they will often have different needs or motivations depending on the particular trips. Please choose the main motivation for this trip.

RANK TOP THREE

[ROTATE]
Helped me enjoy life to the fullest
Allowed me to let go and feel completely carefree
Allowed me to immerse myself in the local life and culture
Helped me to meet new people and create memories
Allowed me to enjoy special moments together with my loved ones

# Questionnaire

Allowed me to strengthen relationships with those close to me
Restored my sense of harmony and balance
Helped me to escape from everyday stress and pressure and find a sense of relaxation
Provided me with unique and interesting experiences
Broadened my knowledge & enriched my understanding of the world
Gave me a sense of exhilaration
Challenged me to try something new
Gave me time out to think and regain control of my life
Allowed me to feel organized and avoid surprises
Allowed me to connect with nature

T5. How many nights did you stay in Mammoth Lakes during this [MONTH YEAR] trip? *If you did not stay overnight, please enter '0'.* \_\_\_\_

T6. Including you, how many people were in your travel party? \_\_\_\_

T6A. [ASK IF Q5>1] How many people in your travel party were children under the age of 18?

T7. How did you travel to Mammoth Lakes for this trip?

- Flew
- Drove

T8. How far in advance of this trip did you choose Mammoth Lakes as your destination?

- Less than a week
- One to two weeks
- Three to four weeks
- One to three months
- Three to six months
- More than six months

[IF T5=0, SKIP Q9 SERIES]

T9. While in Mammoth Lakes, did you stay...? [ROTATE]

- With family and/or friends
- In a property I own
- In a rental unit (condo/ house)
- In an Airbnb/Vrbo
- In a hotel/motel
- At an RV park/Camping
- In other paid accommodations

T9A. [SHOW ONLY PAID ACCOMMODATIONS (CONDO THRU OTHER) SELECTED IN Q7] We'd like to better understand the economic impact of tourism. Approximately how much did your travel party spend on this trip on your... [SHOW WITH NUM BOX]

- Rental unit (condo/ house)
- In an Airbnb/Vrbo
- Hotel/motel
- RV park/Camping
- Other paid accommodations

T10. Approximately how much did your travel party spend in Mammoth Lakes on the following *non-lodging* items during your [MONTH YEAR] trip?

*If you spent nothing in a category, enter "0"*

- Dining out/nightlife
- Groceries
- Outdoor activities/attractions
- Shopping
- Entertainment such as shows, theater or concerts
- Transportation to/from Mammoth Lakes
- Transportation within Mammoth Lakes
- Other

T11. Which of the following activities did you, or members of your travel party, participate in during your [MONTH YEAR] trip? *Select all that apply.* [ROTATE]

<b>Skiing &amp; Snowsport</b> [CONFIRM WITH CLIENT MONTHS WITH SNOW]
Downhill skiing
Cross country skiing
Backcountry skiing
Snowboarding
Snowmobiling
Snowcat tour
Snowshoeing
Ice skating
Sledding
Ice climbing
Tubing
Fat biking
Other snow sport, specify _____
<b>Viewing &amp; Enjoying Natural Scenery</b>
Scenic drives
Scenic helicopter
Gondola rides

# Questionnaire

Visiting geological formations unique to the area
Sightseeing
Viewing mountains, lakes, etc.
Other, specify _____
<b>Outdoor Activities</b>
Hiking
Backpacking / mountaineering
High altitude training
Nature walks
Wildlife watching
Rock climbing
Fishing
Road biking [ANCHOR POSITION]
Mountain biking [ANCHOR POSITION]
Other biking [ANCHOR POSITION]
Other outdoor activity, specify _____
<b>Special Events</b>
Festivals and events (music, food, arts, health & wellness, etc.)
Arts, culture activities such as theater performances, museums
Attending or participating in a sporting event
Other event, specify _____
<b>Other Activities</b>
Visiting small towns and rural areas
Visiting historical sites
Visiting a brewery/distillery
Visiting a spa
Fine dining or eating at a local restaurant
Shopping
Entertainment and nightlife
Visiting a national park, forest, or monument
Health & wellness
Other, specify _____
None of these activities [EXCLUSIVE]

T12. [SHOW ACTIVITIES SELECTED IN Q9 AND None of these] Which of these activities motivated your Mammoth Lakes vacation planning? *You may choose up to 5.*

T13. Thinking about your overall experience in Mammoth Lakes, would you say it was...?

Poor	Fair	Good	Very good	Excellent
------	------	------	-----------	-----------

T14. How likely are you to recommend Mammoth Lakes to your friends or family as a destination to visit for a leisure trip?

Not at all likely										Extremely likely
1	2	3	4	5	6	7	8	9	10	

## PLANNING & MOTIVATION

Now we'd like you to think more generally about how you planned your trip(s) to Mammoth Lakes over the past year.

P1. In the course of researching or planning a leisure trip, have you gathered information in any of the following ways? (Select all that apply.) [ROTATE]

- Destination website (www.visitmammoth.com)
- Resort website (mammothmountain.com)
- Other destination website (Mono County Tourism, Visit California, etc.) [ANCHOR AFTER ABOVE]
- Family or friends
- Online travel advice websites (TripAdvisor.com, AAA.com, etc.)
- Guide books/websites like Frommer's or Lonely Planet
- Magazine and newspaper articles
- Advertisements (television, online, magazine, etc.)
- Airline ad
- Social media (Facebook, Twitter, Instagram, etc.)
- Online traveler reviews
- Travel guide, visitor planning guide
- Travel agent
- Travel blog
- Ski-snowboard website
- Trade show
- Video platform (YouTube, Vimeo)
- Other, please specify \_\_\_\_\_
- Did not gather information

P2. Was Mammoth Lakes familiar to you prior to your recent visit? *Select all that apply.* [ROTATE, ANCHOR OTHER AND NO..., I WAS NOT...]

Yes, I have family and friends there
Yes, I have family or friends who own property there
Yes, I've been many times and know it will deliver the vacation I want
Yes, I used to live in the area
Yes, I've always wanted to go there
Yes, I was attending a planned event (tournament, meeting, wedding, etc.)
Yes, I own a home there
Other (please specify) _____
No, I was not familiar with Mammoth Lakes prior to my recent trip



# Questionnaire

## AD AWARENESS

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.


### VIDEO

I:\Ads Master\Mammoth Lakes\Winter 2023\Video  
 VIDEOS [SHOW ONLY :30 EXECUTION AND ONE :15 VIDEO; ROTATE TO ENSURE SUFFICIENT MEASURE OF EACH VIDEO]

 :30	
MAMMOTH_THE REAL UNREAL_30_REV WEB (1).mp4	
VIMEO: 822707950	
 :15	 :15
MAMMOTH_55000 YEARS_15_WEBMIX_UNSLATED_FINAL.mp4	MAMMOTH_ACRES_15_WEBMIX_UNSLATED_FINAL.mp4
VIMEO: 822736647	VIMEO: 822737994
 :15	 :15
MAMMOTH_ANOTHER PLANET_15_WEBMIX_UNSLATED_FINAL.mp4	MAMMOTH_HOW UNREAL_15_WEBMIX_UNSLATED_FINAL.mp4
VIMEO: 822739661	VIMEO: 822740903

## Interactive TV





I:\Ads Master\Mammoth Lakes\Winter 2023\Interactive TV\

 :30	 :07
Hulu Interactive TV.mov	Hulu Premium Slate.mov
VIMEO: 822744197	VIMEO: 822760113

## SOCIAL DISPLAY

### Facebook

I:\Ads Master\Mammoth Lakes\Winter 2023\Social Display\Winter\Facebook\General Brand

	
FB Bucket List.png	FB Family.png
	
FB One Word.png	FB Skiing.png

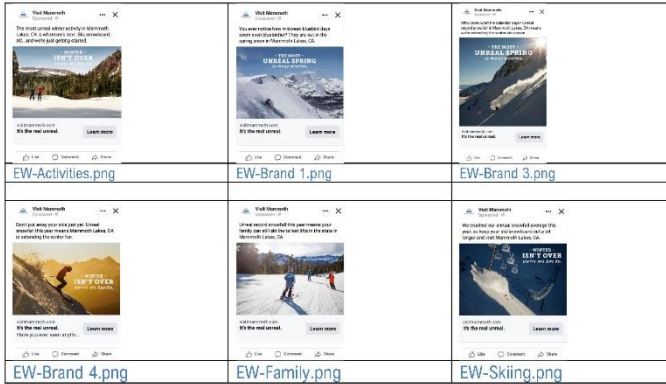
I:\Ads Master\Mammoth Lakes\Winter 2023\Social Display\Winter\Facebook\AirService\Far Market

	
AirService Far 1.png	AirService Far 2.png

# Questionnaire

## Facebook – Extended Winter

I:\Ads Master\Mammoth Lakes\Winter 2023\Social Display\Extended Winter\Facebook\General Brand\



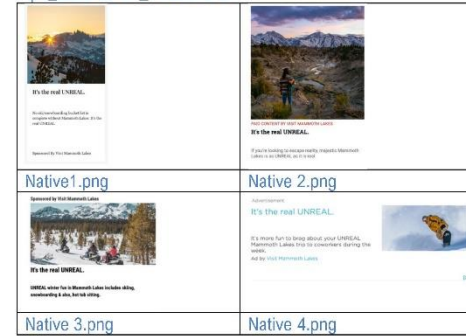
## Instagram

I:\Ads Master\Mammoth Lakes\Winter 2023\Social Display\Winter\Instagram Stories\



## NATIVE DISPLAY

I:\Ads Master\Mammoth Lakes\Winter 2023\wetransfer\_undertone-page-grabber-unit\_1-1-mp4\_2023-05-01\_1433\Brand\



## NATIVE DISPLAY AIR SERVICE

I:\Ads Master\Mammoth Lakes\Winter 2023\wetransfer\_undertone-page-grabber-unit\_1-1-mp4\_2023-05-01\_1433\Air Service\




# Questionnaire

## DIGITAL

I:\Ads Master\Mammoth Lakes\Winter 2023\Digital Display\...html

	
MAM_Winter_AirService_Northeast_300x250	MAM_Winter_Brand_300x250

I:\Ads Master\Mammoth Lakes\Winter 2023\wetransfer\_undertone-page-grabber-unit\_1-1-mp4\_2023-05-01\_1433\

	:10
Undertone Page Grabber Unit 1 (1).mp4	
VIMEO: 822760723	

## OOH

### BOSTON

I:\Ads Master\Mammoth Lakes\Winter 2023\



MAM\_BostonOOH\_14x48\_209x720.jpg

### DENVER (Airport)

I:\Ads Master\Mammoth Lakes\Winter 2023\OOH\Denver\Denver OOH Video Assets\Mammoth\_Lakes\_Denver\_Video\_Wall\_1\_1920x1080\_10\_FINAL.mp4



Mammoth\_Lakes\_Denver\_Video\_Wall\_1\_1920x1080\_10\_FINAL.mp4  
VIMEO: 822761783

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## NYC

	:17
3559970 Mammoth Lakes BC27 New York Subway Liveboards	
2022.11.21.3.mp4	
VIMEO: 822763461	

## PRINT

	
MAM_BusinessTraveler_FullPage.jpg	MAM_Hemispheres_FullPage.jpg

## RADIO

I:\Ads Master\Mammoth Lakes\Winter 2023\Radio\  
Pandora Streaming\_Unreal.mp3 :30  
VIMEO: 822979749

Ad1. [ASK AFTER EACH AD/GROUP OF ADS] Do you recall seeing [this ad/these ads] or ads like them for Mammoth Lakes, California?

Yes  
No

Ad2. Thinking about all of the ads you have just seen, what is your reaction to [this ad/these ads]?

Positive  
Negative  
Neutral

Ad3. [ASK IF Ad2 IS NEGATIVE; ASK] Why do you feel that way? \_\_\_\_\_

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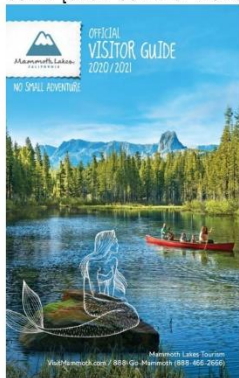
# Questionnaire

## COMMUNICATIONGRID.

ADD: When you think about all of the content you just saw as a whole, how much do you agree that this content communicates that Mammoth Lakes is...

ROTATE	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
A place that offers an exhilarating environment and activities					
A place that inspires me to want to keep Mammoth Lakes beautiful					
A place that exudes a sense of awe and wonder					
An authentic outdoor playground					
Like nothing I have seen or experienced before					
A place that I want to take a vacation to					

GUIDE. [SHOW COVER OF VISITOR GUIDE] Have you used this Visitor Guide? YES/NO



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- 15 -

[ASK GUIDE2 AND GUIDE3 IF YES AT GUIDE; SHOW ALL QUESTIONS ON SAME SCREEN WITH IMAGE]

GUIDE2. Which version of the Visitor Guide did you use? Print/Digital/Both

GUIDE3. Did you review the Visitor Guide...?

Before deciding to visit Mammoth Lakes, while considering places to go  
After deciding to visit Mammoth Lakes, to help plan your trip  
Once arrived in Mammoth Lakes, as a resource

GUIDE4. How would you rate the usefulness of the guide?

Not useful	Somewhat useful	Very useful
------------	-----------------	-------------

GUIDE5. Please tell us why you rated it this way. \_\_\_\_\_

SOCIAL 1. Do you follow Visit Mammoth on any of the following social channels? [SHOW MLT TILE FOR EACH]

Facebook  
Instagram  
Twitter  
Tik Tok  
YouTube  
Pinterest  
Other



Do not follow Visit Mammoth on any social channels

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- 16 -

# Questionnaire

## DEMOS

The following questions are for classification purposes only so that your responses may be grouped with those of others.

marital. Are you currently...?

- Married
- Divorced/separated
- Widowed
- Single/never married

PPinHH. Including you, how many people are currently living in your household? \_\_\_\_\_

[IF PPHHH>]Kids. How many living in your household are children under the age of 18?  
\_\_\_\_\_

education. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

income. Which of the following categories best represents your total household income before taxes?

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 - \$300,000
- \$300,000 - \$400,000
- \$400,000 - \$500,000
- \$500,000+

eth. Which of the following best describes your ethnic heritage? Select all that apply.

[ALLOW MULTI]

- Caucasian/White
- African-American/Black
- Asian
- American Indian or Alaska Native
- Native Hawaiian or Other Pacific Islander
- Other, please specify \_\_\_\_\_

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- 17 -

eth2. Do you identify as Hispanic or Latino?

- YES
- NO

gender. Do you identify as...

- Male
- Female
- Non-binary
- Prefer not to answer

Identity. Do you identify as LGBTQ+?

- YES
- NO
- Prefer not to answer

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- 18 -