



2024 End of Year Advertising Effectiveness Research

December 2024

SMARInsights

Background & Objectives

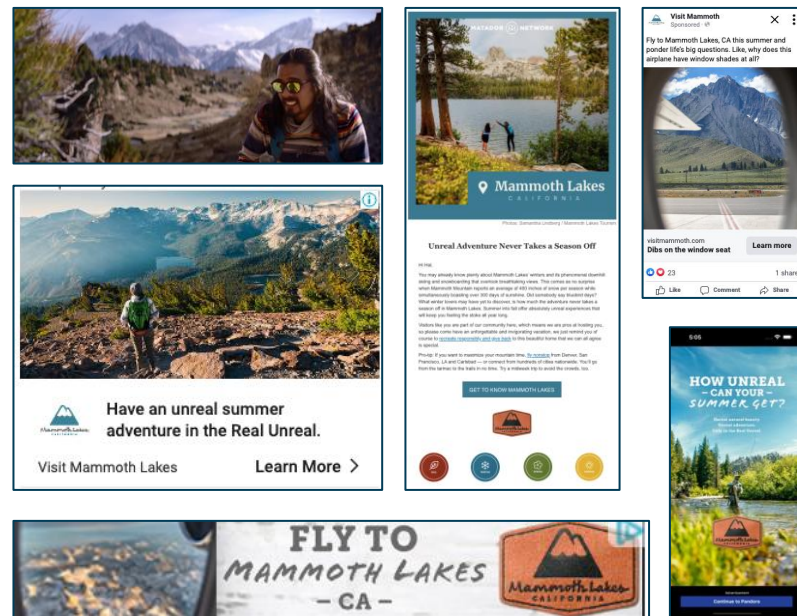
- Mammoth Lakes Tourism (MLT) has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct advertising effectiveness research to understand the impact of the FY23-24 advertising campaigns. A previous research effort evaluated the winter advertising. This current research focuses on the Summer/Fall advertising and provides a total FY ROI.
- Specific goals of the research include measuring:
 - The level of advertising recall among targeted consumers;
 - Changes in attitudes or perceptions that can be linked to the advertising;
 - Ad influence on likelihood to visit the destination;
 - The strength of the creative at communicating key messages;
 - Ad impact on travel anticipation behaviors such as researching the destination;
 - Ad influence on leisure visits to Mammoth Lakes and on visitor spending; and
 - Return on investment (ROI) of the 2024 advertising

Campaign Overview

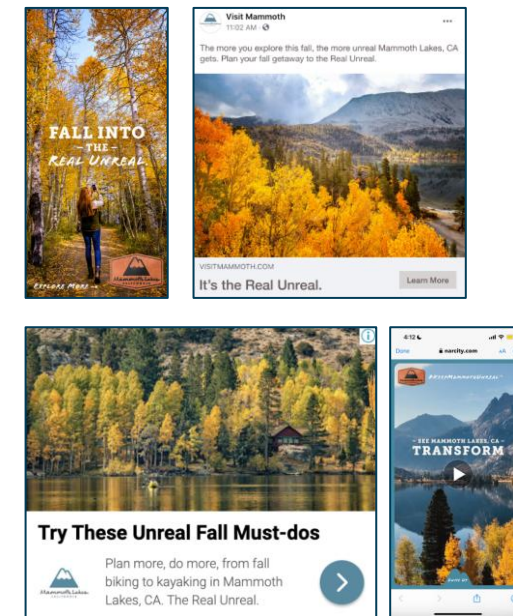
- The Summer and Fall campaigns utilize a narrower range of media channels than winter – focusing on digital, social and streaming audio.
- The Summer campaign ran from mid-April through August.
- The Fall campaign ran from mid-August through October.

Season	Media Investment
Winter 2023 (Wave 1)	\$1,240,486
Summer/Fall 2024 (Current Wave)	\$583,614
Full Year	\$1,824,100

2024 Summer Advertising



2024 Fall advertising



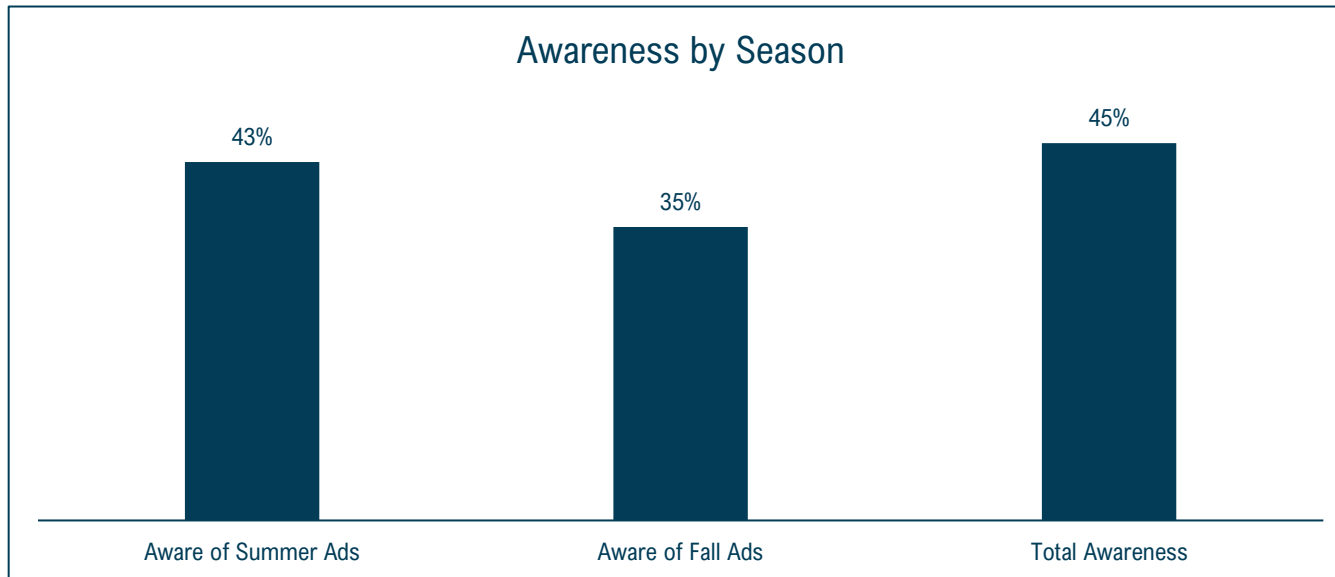
Summer/Fall Advertising Awareness



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Summer/Fall Ad Awareness

- Recall across the Summer/Fall advertising reached 45% in 2024 (over 3.1 million aware households).
- With a media investment of \$583,614, this results in a cost per aware household of \$0.19. This campaign was more efficient than the average (\$0.32) of campaigns with similar spend and scope.



Summer/Fall 2024	
Target HHs	6,847,608
Ad Awareness	45%
Ad-Aware HHs	3,108,855
Media Investment	\$583,614
Cost per Aware HH	\$0.19

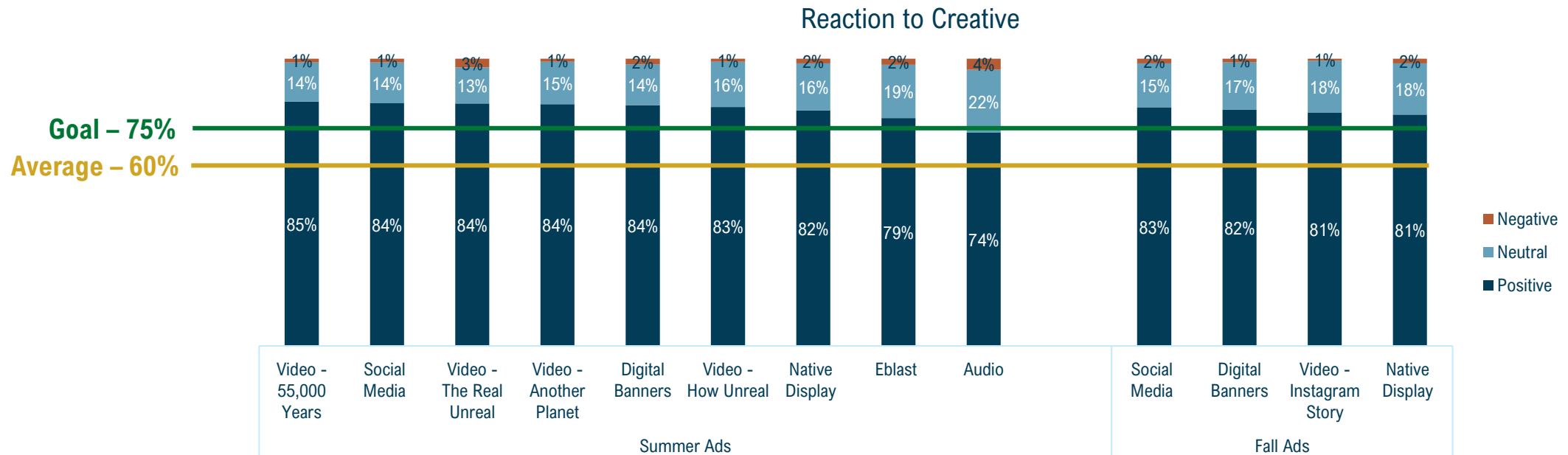
Average Cost
per Aware HH
= \$0.32

Summer/Fall Creative Evaluation



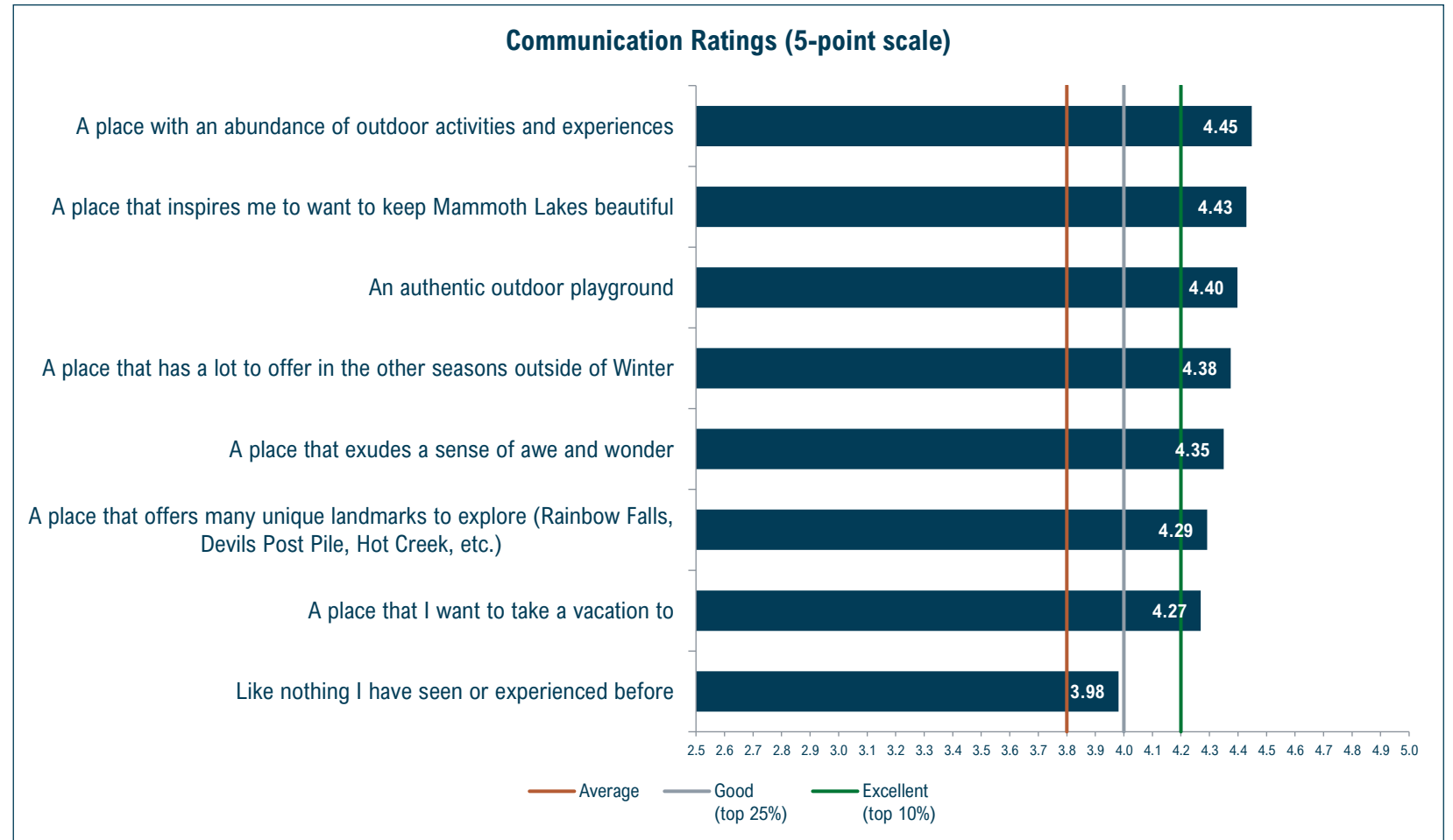
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Reaction to Creative



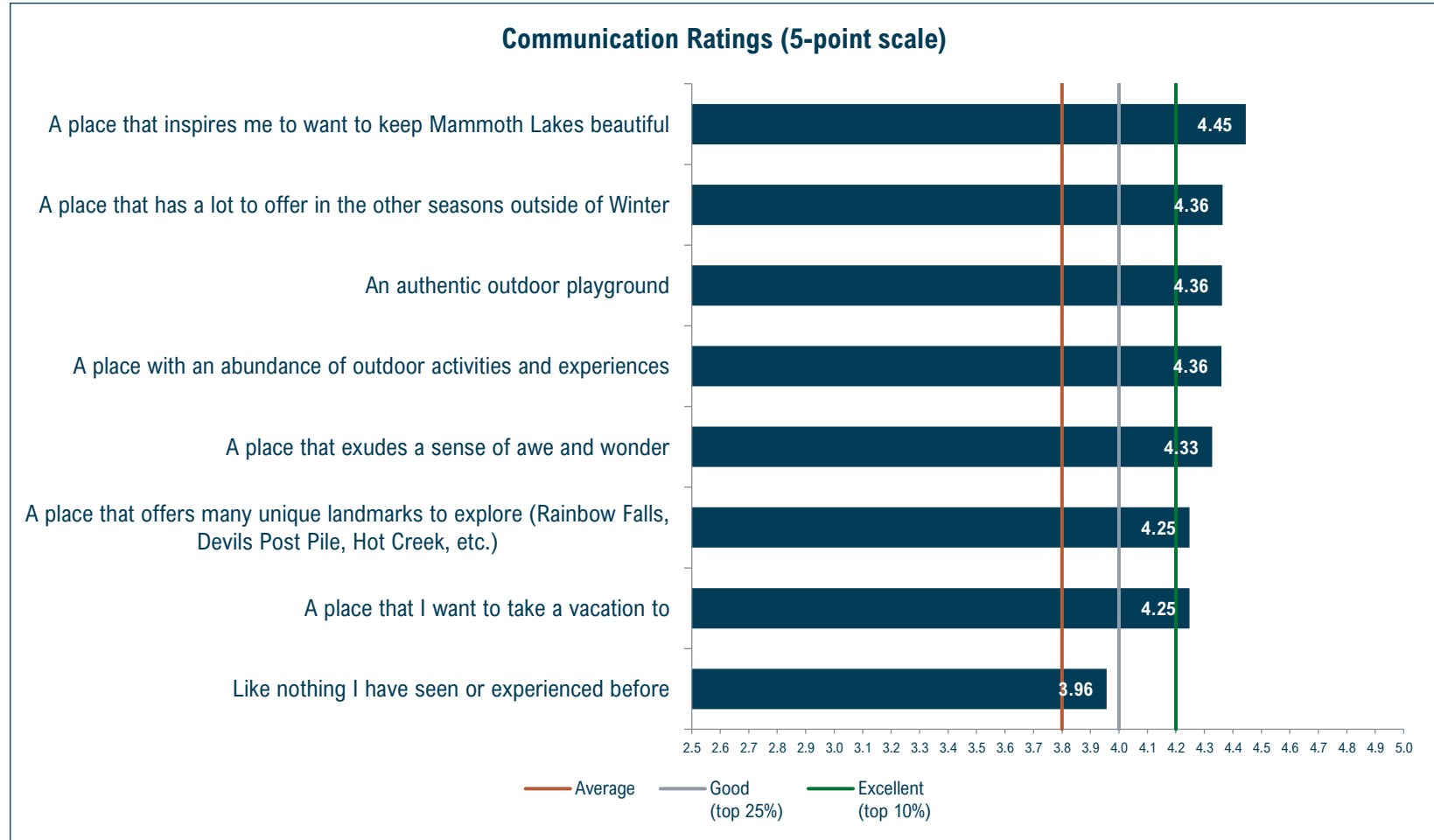
Summer Creative Ratings

- SMARInsights has developed benchmarks for destination creative based on the evaluation of hundreds of campaigns. On a 5-point scale, the average rating for something the creative is attempting to communicate is 3.8, with campaigns in the top 10% generating rating of 4.2 or higher.



Fall Creative Ratings

- The Fall ads perform similarly to the Summer ads, excelling at effectively communicating their intended messages.



FY 23-24 ROI

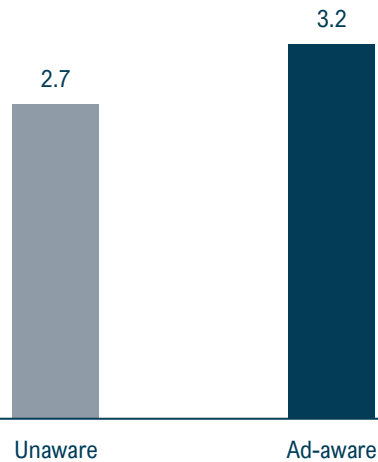


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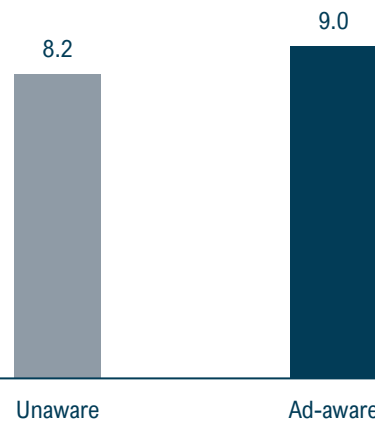
Ad Impact on Summer/Fall Trips

- The ads go further than influencing travel to the destination by helping to enhance traveler experiences. Ad-aware travelers took longer trips, engaged in more activities during their trip, and spent more money than ad-unaware travelers. Aware travelers were also more likely to recommend Mammoth Lakes as a leisure destination to their friends and family.

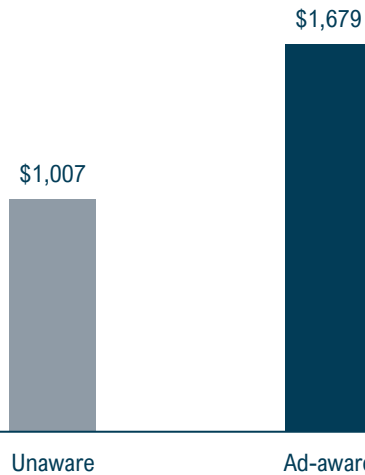
Nights on Trip



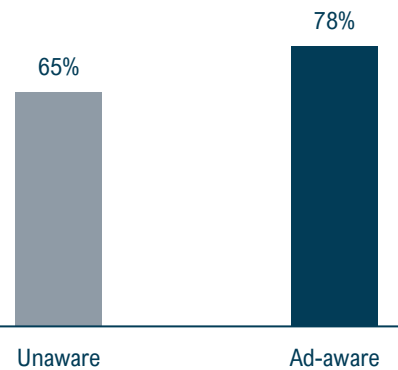
Average Number of Trip Activities



Average Trip Spending



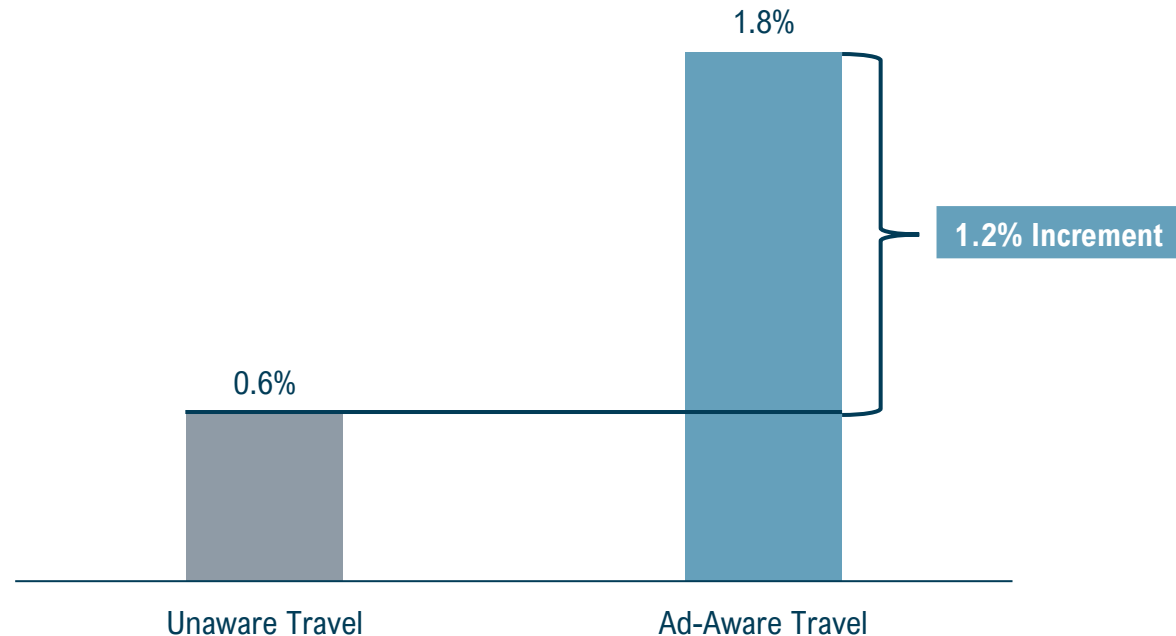
Top 2 Box Likelihood to Recommend Mammoth Lakes Based on Trip Experience



Summer/Fall Incremental Travel

- The Summer/Fall travel advertising produced a 1.2% travel increment that will be used to calculate the return on investment for the campaign.
- Again, note that we are counting only influenceable travel by controlling for VFR, regular visitors, property owners, and special events attendees.

Summer/Fall 2024 Mammoth Lakes Travel



Summer/Fall ROI

The 2024 Summer/Fall advertising generated nearly 38,000 incremental trips, resulting in nearly \$64 million in influenced visitor spending in Mammoth Lakes.

- Mammoth Lakes Tourism spent \$583,614 on these campaigns in 2024. For every dollar MLT spent, leisure visitors spent \$109 in the community.

	Summer/Fall 2024
Target HHs	6,847,608
Ad Awareness	45%
Ad-Aware HHs	3,108,855
Incremental Travel	1.2%
Ad-Influenced Trips	37,851
Avg. Trip Spending	\$1,679
Ad-Influenced Visitor Spending	\$63,539,645
Media Investment	\$583,614
ROI	\$109

End of Year ROI

MLT's FY23-24 advertising achieved a total ROI of \$167. The average ROI for campaigns of similar scope is \$156.

- The 2024 campaigns influenced more than 150,000 trips.
- Influenced travelers spent over \$300 million dollars in Mammoth Lakes in 2024.
- The Winter ROI (measured in June) was \$194, which is slightly stronger than the full year ROI partly due to Winter visitors spending nearly \$400 more on average per trip than Summer/Fall visitors.

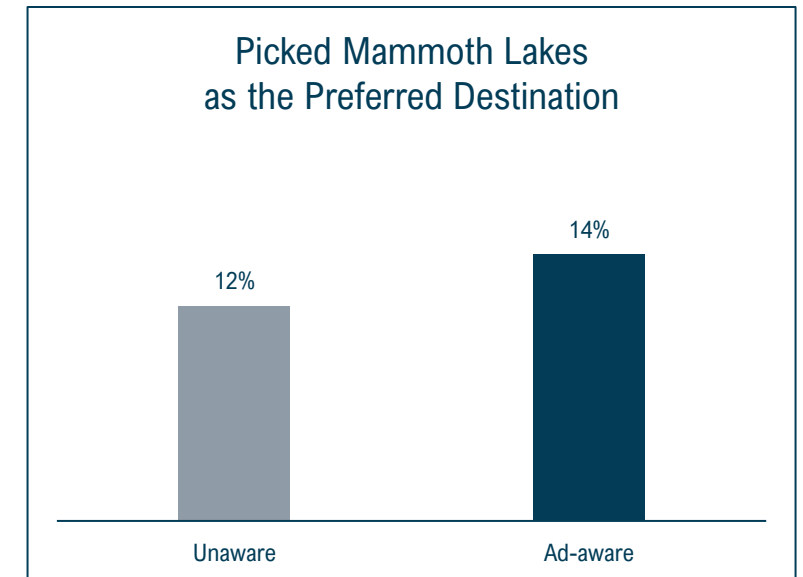
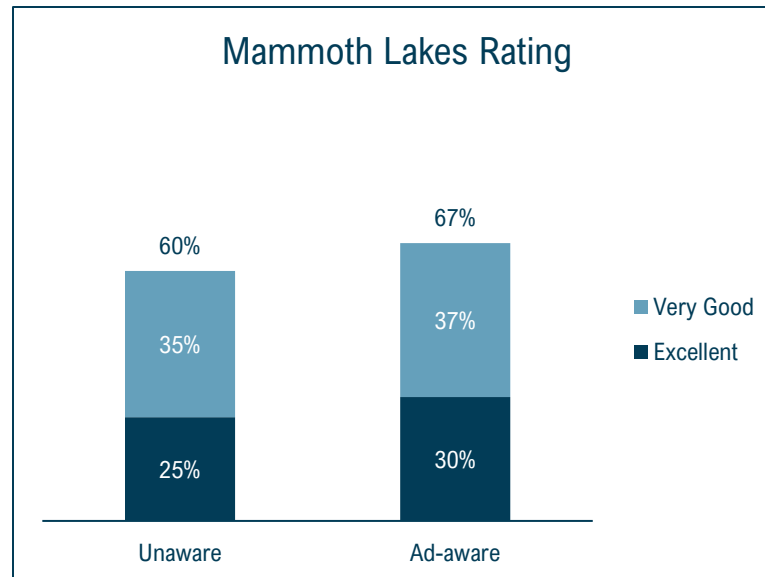
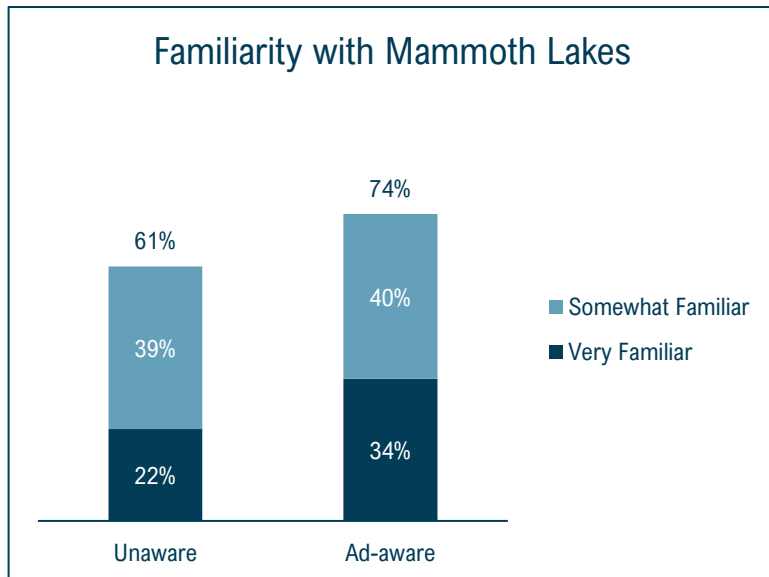
	Winter 2023-2024	Summer/Fall 2024	Full Year
Ad-Influenced Trips	119,323	37,851	157,174
Avg. Trip Spending	\$2,020	\$1,679	\$1,938
Ad-Influenced Visitor Spending	\$241,042,465	\$63,539,645	\$304,582,110
Media Investment	\$1,240,486	\$583,614	\$1,824,100
ROI	\$194	\$109	\$167

Advertising Impact on Mammoth Lakes Brand Health

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Ad Impact on Brand Health

- The advertising helps to strengthen Mammoth Lakes' brand health, with ad-aware travelers being more familiar with the destination and more positive in their rating for Mammoth Lakes as a destination for leisure trips.
- Those aware of the ads are also more likely than those not aware of the ads to choose Mammoth as the preferred leisure destination out of the competitive set.



Ad Impact on Mammoth Image

SMARInsights' Destination Ratings Benchmarks

>= 4.0 = Excellent (top 10%)

3.99 – 3.75 = Good (top 25%)

3.74 – 3.5 = Average

< 3.5 = Below Average

- Mammoth Lakes has a strong image among target consumers and the advertising helps to further improve perceptions.
- Among aware travelers, all but two attributes land in the top 10% benchmark. The attributes *Is like nothing you have ever seen before* and *Is rustic and rugged* land in the top 25% benchmark.
- *Is like nothing you have ever seen before* improves from the average benchmark among ad-unaware travelers to just shy of the top 10% benchmark among ad-aware travelers.

	Unaware	Ad-aware
Is a place you want to protect or keep beautiful	4.26	4.38
Is a destination for outdoor adventurers	4.20	4.29
Is majestic in scale and awesome in its natural beauty	4.08	4.27
Is welcoming and friendly	3.94	4.25
Is a place that exudes a sense of awe and wonder	3.96	4.21
Offers an extraordinary sense of awe and feeling of exhilaration	3.97	4.21
Has an abundance of diverse terrain	3.95	4.21
Is an authentic outdoor playground	4.08	4.20
Is inclusive to all	3.81	4.13
Is accessible to all	3.77	4.11
Offers an abundance of year-round activities right outside your door	3.94	4.11
Is a destination that values sustainability and stewardship - Mammoth Lakes	3.80	4.09
Is unpretentious and down-to-earth	3.86	4.05
Is like nothing you have ever seen before	3.60	3.99
Is rustic and rugged	3.89	3.90

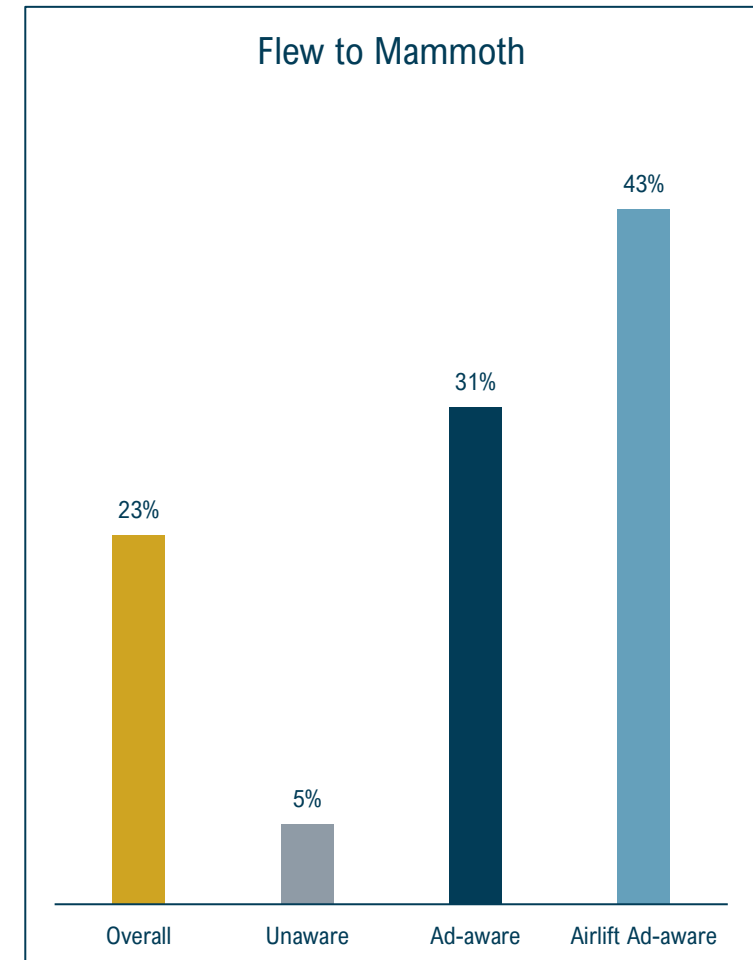
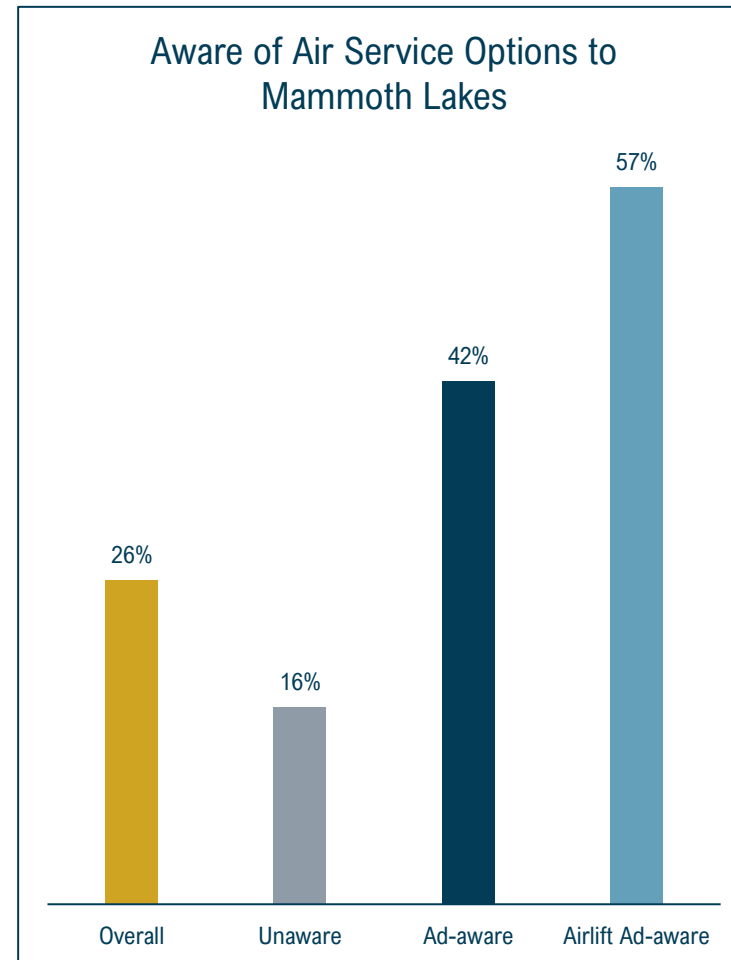
Trip Specifics



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Flights to Mammoth

The method of travel for most Mammoth Lakes visitors is driving, but as aware travelers flew significantly more than those who were unaware, and it is closer to an even split among those aware of the airlift ads.



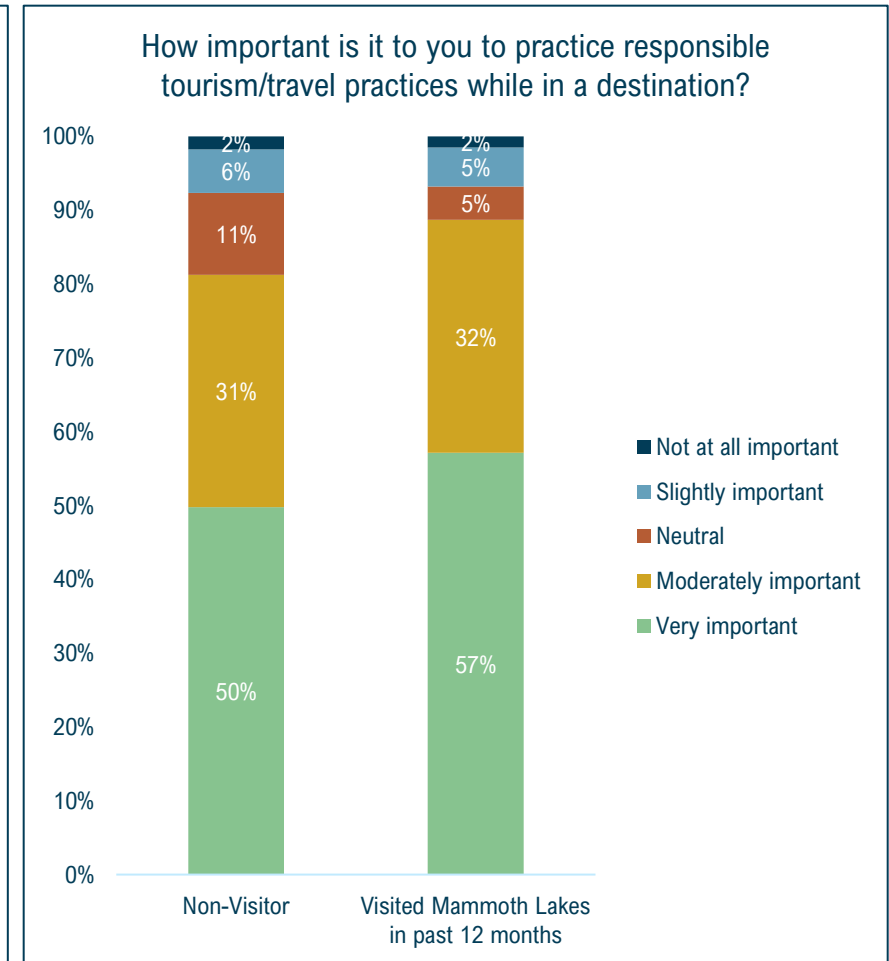
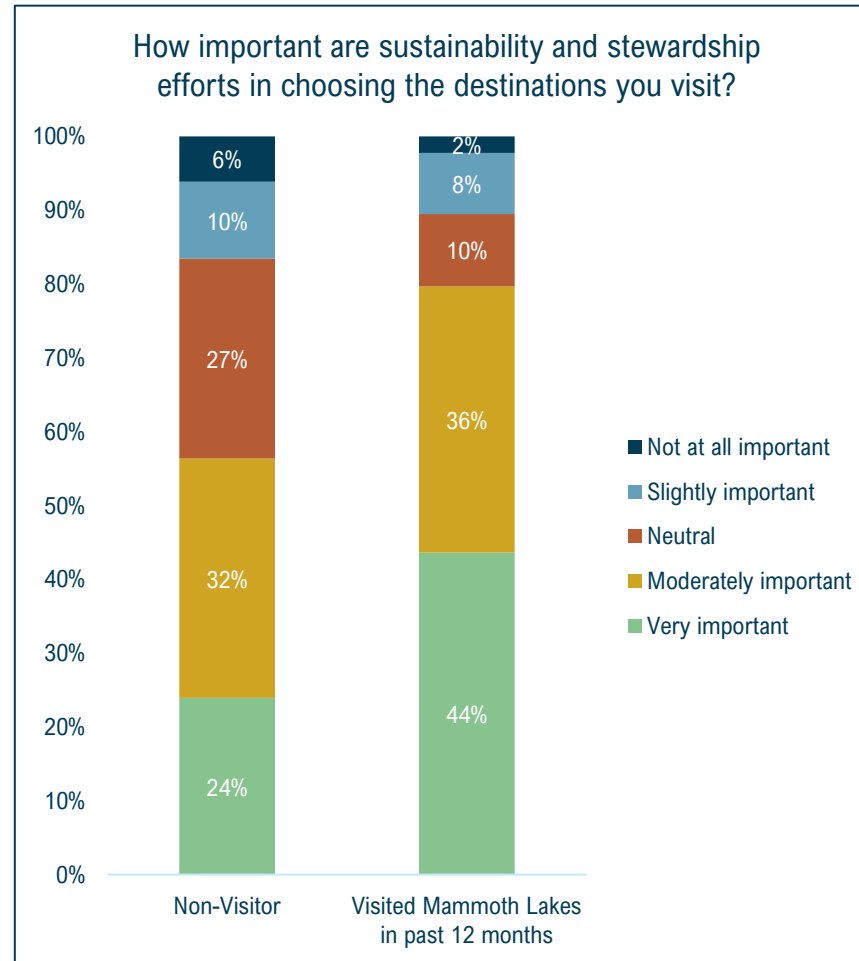
Sustainability



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Sustainability Importance – Mammoth Visitors

- Those who have visited Mammoth lakes in the past 12 months are more likely than non-visitors to say that sustainability is important to them when choosing destinations and that it is important to practice responsible tourism while in a destination.



Sustainability Importance – Mammoth Trips

- Sustainability and stewardship efforts are much more important when choosing to visit Mammoth Lakes than they are in general.
- Even among recent Mammoth Lakes visitors, sustainability was more important when choosing to visit Mammoth than when choosing leisure travel destinations in general.

