



Winter 2025-2026 Advertising Effectiveness Research

May 2026

SMARInsights



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Background & Objectives

- Mammoth Lakes Tourism (MLT) has again partnered with Strategic Marketing & Research Insights (SMARInsights) to measure winter advertising effectiveness.
- This report evaluates the *Real Unreal 2025-2026* winter advertising. This campaign launched in winter 2022-2023. SMARInsights conducted advertising effectiveness research each of the past four years, allowing for comparisons of results over time.
- The specific objectives of this research are to:
 - Measure awareness of the advertising
 - Assess reactions to the creative
 - Gauge impact of the advertising on destination image, destination rating, and likelihood to visit
 - Evaluate advertising impact on visitation
 - Calculate ad-influenced trips, visitor spending, and ROI
 - Explore the impact of the campaign on visitors' understanding of responsible, sustainable tourism
 - Present insights and recommendations

Methodology

- An online survey was used so that respondents could view the actual advertising. This approach provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels were used so that the results can be projected to the population.
- Respondents were screened to be adult travel decision makers who qualify as snow and/or outdoor leisure travelers. Almost all snow travelers are also outdoor travelers. For the purposes of the reporting, **Snow Travelers** refers to snow-only and snow/outdoor travelers, while **Outdoor Travelers** refers to outdoor travelers who are not snow travelers.
- A total of 3,000 surveys were completed in the target markets between April 30th and May 12th, 2026.
- Upon completion of data collection, the results were cleaned and weighted to be representative of the population distribution.

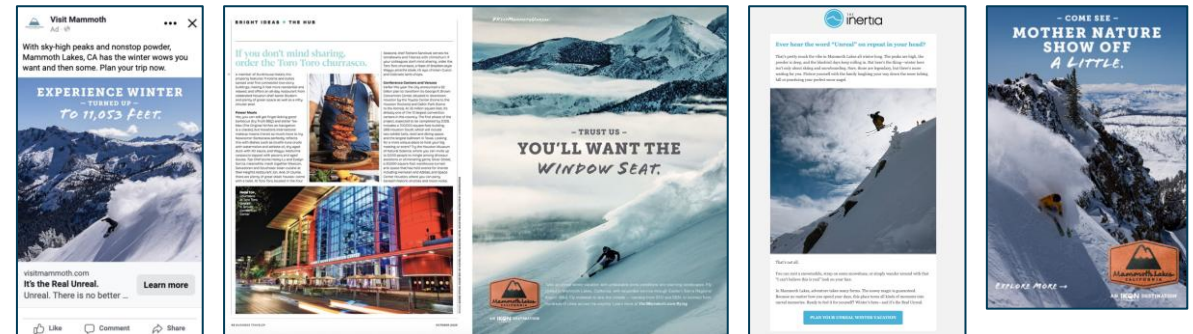
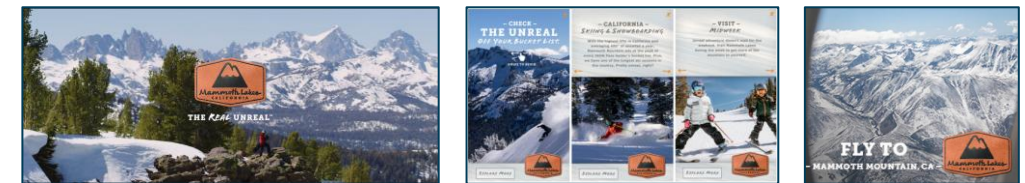
Qualified Respondents	Market	Completed Surveys
Traveling households <ul style="list-style-type: none"> • Households that typically take at least one overnight leisure trip/year 	California and Nevada	1,505
Snow Travelers <ul style="list-style-type: none"> • Engage in skiing, snowmobiling and/or other outdoor winter activities • Have been on a snow vacation in the past 2 years 	Denver	492
Outdoor Travelers <ul style="list-style-type: none"> • Enjoy passive or active outdoor activities and/or • Enjoy being outdoors in nature 	Northeast (NYC and Boston)	1,003
	Total	3,000

Campaign Overview

- The *Real Unreal* winter advertising campaign debuted during winter 2022-2023.
- The 2025-2026 advertising media tested in this research included video, social media, native, digital display, print, eBlast, and High Impact. Sample ads are shown on the right. The full collection of assets tested can be found in the questionnaire in the Appendix.
- The total 2025-2026 investment in these ads in the target markets was about \$836,000 – down 16% from the \$1 million investment the prior year.

Market	Winter 2022-2023	Winter 2023-2024	Winter 2024-2025	Winter 2025-2026	% Change
California & Nevada	\$427,024	\$557,824	\$399,888	\$340,126	-15%
Denver	\$478,025	\$249,396	\$115,983	\$133,946	15%
Northeast	\$691,400	\$433,265	\$484,518	\$362,018	-25%
Total	\$1,596,449	\$1,240,486	\$1,000,389	\$836,091	-16%

Sample 2025-2026 advertising tested in this research



2025-2026 Snow Condition Overview

- This year, poor snow conditions across much of the western US posed a challenge for winter destinations, leading to a 15% decline in snow-related travel nationally.
- While the 2025-2026 ski season was challenging across much of the western U.S., available evidence suggests Mammoth Lakes was less negatively impacted than many Rocky Mountain destinations. Mammoth benefited from several significant Sierra storm cycles and maintained solid destination demand despite below-average overall snowfall relative to 2023-2024.
- Mammoth Lakes' 2025-2026 snow season was broadly in line with 2024-2025, though both seasons were below the stronger 2023-2024 season. Conditions in 2025-2026 featured stronger midwinter storms but weaker late-season coverage due to a dry March.

Insights

- Recall of the 2025-2026 *Real Unreal* campaign is 33%, meaning the campaign reached over 3.5 million households. Overall awareness remained relatively stable despite a 16% reduction in the media budget this year.
- The campaign grew more efficient this year, with an overall cost per aware household of \$0.23 compared to \$0.26 last year. The campaign continued to outperform SMARInsights' benchmark of \$0.32 for similar campaigns.
- The 2025-2026 *Real Unreal* campaign influenced more than 46,000 Mammoth trips and generated \$103 million in ad-influenced visitor spending. Against an \$836K budget, this equated to an ROI of \$124 for every \$1 invested. Compared to the 2024-2025 campaign that influenced 64,000 trips and \$130 million in ad-influenced visitor spending, the impacts of this year's campaign are down 28% and 20%, respectively. The decline in impact is tied to market level changes:
 - First, the baseline (unaware) travel rate increased in California and Nevada, making it harder to influence trips from those markets this year. The higher baseline rate of travel from the nearby markets is likely the result of Mammoth having better snow conditions than many other areas in the west.
 - Second, the influenced travel rate declined in the Northeast market, likely a response to an excellent winter season seen on the east coast, leading to these travelers staying more local.
 - Finally, Denver has consistently been a challenging market and accounted for no ad-influenced trips this year.
- The ads not only influenced travelers to visit Mammoth, but they also impacted the way visitors behaved in-destination. Ad-aware visitors engaged in more activities, spent more money, and rated their trip better than unaware visitors.
- Creative performance improved year over year, with ratings generally strengthening across the campaign among snow travelers. This is the fourth year of the *Real Unreal* campaign, and it is continuing to deliver without showing any notable signs of wear-out from an evaluative ratings standpoint.

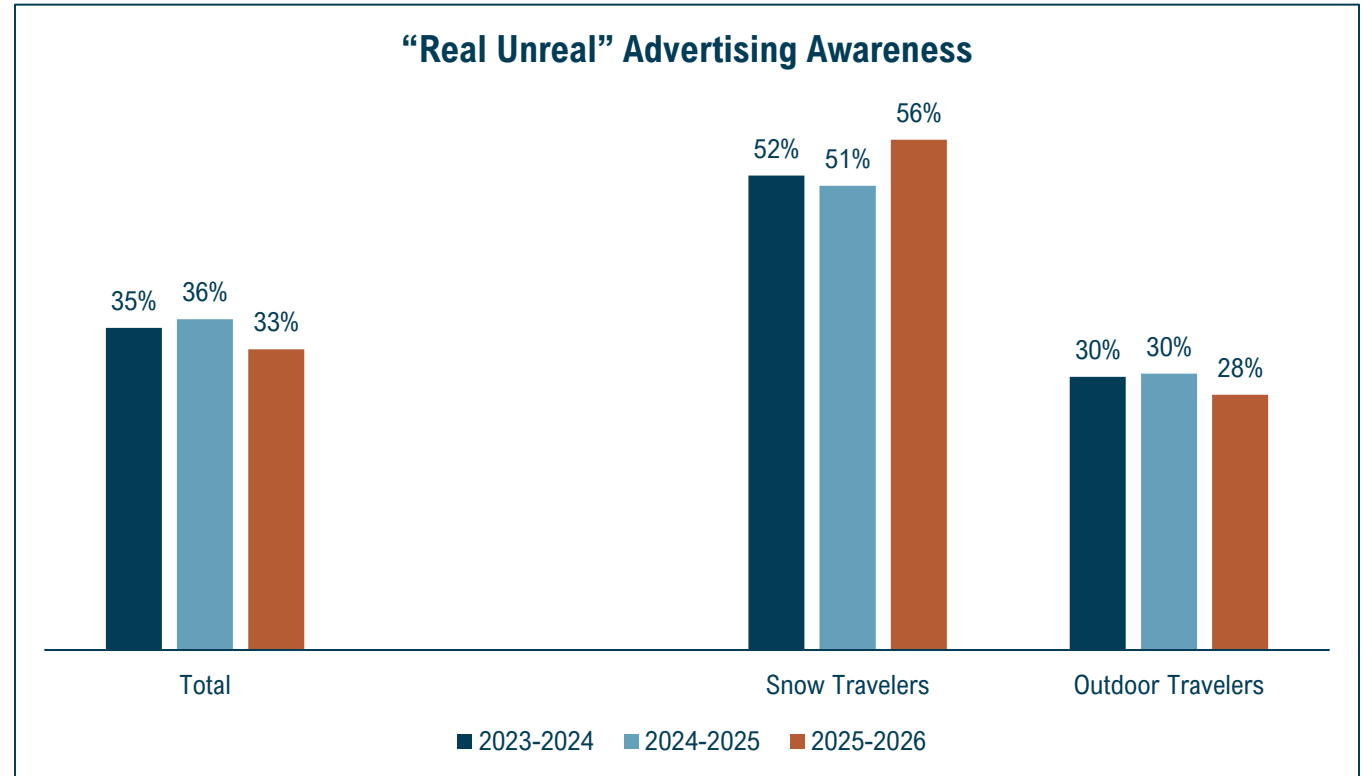
Advertising Awareness

CALIFORNIA
WELCOME
CENTER
NEXT RIGHT

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Winter Advertising Awareness

- Overall recall of the advertising declined slightly in 2025-2026, likely due to the media budget decreasing for the second consecutive year.
- Despite this decline, awareness increased among snow travelers, the primary target audience for the creative campaign.
- By extending the winter advertising to outdoor travelers as well, Mammoth can remain top-of-mind and continue reinforcing its brand image among the broader outdoor traveler audience.



Cost per Aware Household

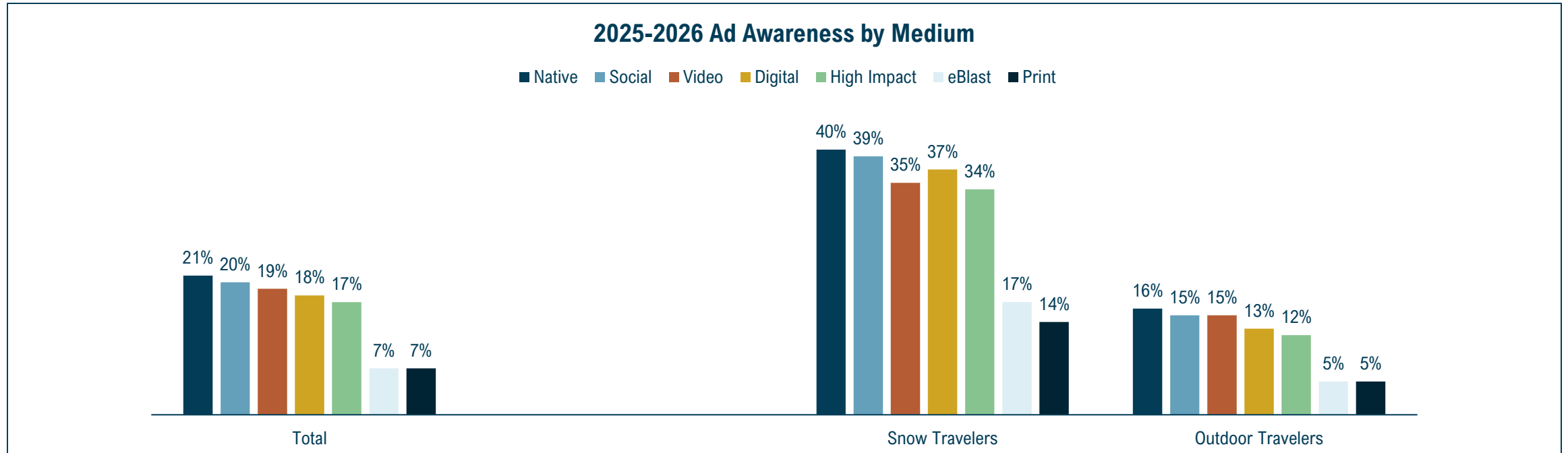
- The media investment grew more efficient this year, with the cost per aware household decreasing by three cents to \$0.23. This is more efficient than SMARInsights’ benchmark for similar campaigns.
- It should be noted that the target household base includes snow and outdoor travelers from the California, Nevada, and Denver markets, while only snow travelers are included from the Northeast market. The “snow traveler only” criteria for the Northeast was implemented last year to reflect the tendency of niche travelers, such as skiers and snowboarders, to travel long distances for their preferred activities.

	2023-2024	2024-2025	2025-2026
Target HHs	10,598,628	10,646,149	10,646,149
Ad Awareness	35%	36%	33%
Ad-Aware HHs	3,745,632	3,863,203	3,561,953
Media Investment	\$1,240,486	\$1,000,389	\$836,091
Cost per Aware HH	\$0.33	\$0.26	\$0.23

Average Cost per Aware HH = \$0.32

2025-2026 Winter Advertising Awareness

by Medium



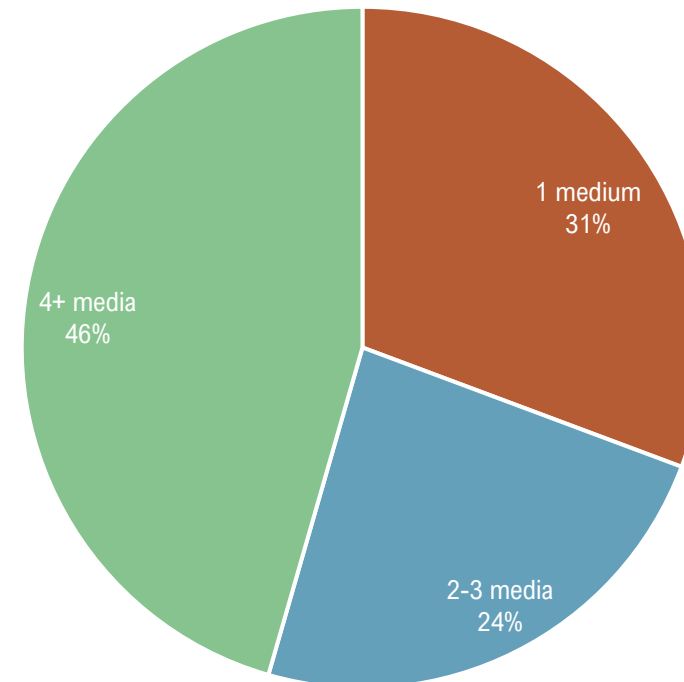
- Recall of the different media options varied from a high of 21% (Native) to a low of 7% (eBlast and Print).
- Among snow travelers, the native and social ads had the highest recall, followed by digital. The video and high impact ads were recalled by more than a third of snow travelers as well.

2025-2026 Winter Advertising

Media Overlap

- With multiple media in use, there is a great deal of overlap. In fact, almost half the ad-aware audience (46%) recalls at least 4 of the different media.
- Media overlap is important because it typically leads to increased levels of ad-influenced travel. These impacts will be explored later in the report.

**2025-2026 Media Overlap
(among those aware of any ads)**



Creative Evaluation

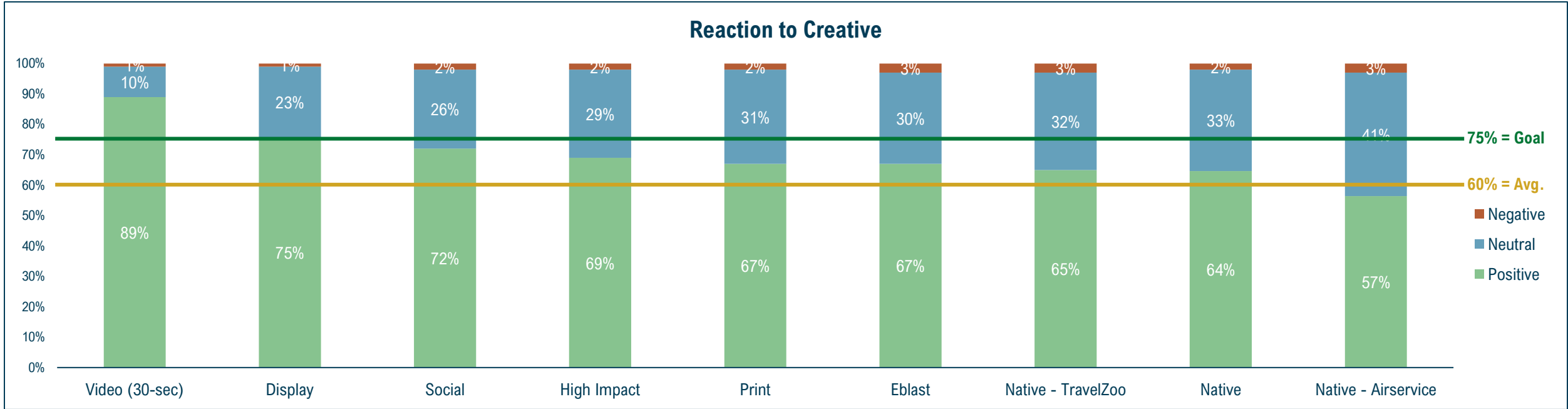
Reaction to individual creative assets will be broken out at the market level this year, as each market received unique creative. The results will also be presented among snow and outdoor travelers together and among snow travelers only.

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Reaction to Creative

CA/NV Snow and Outdoor Travelers

All Travelers
Avg. = 60%
Goal = 75%

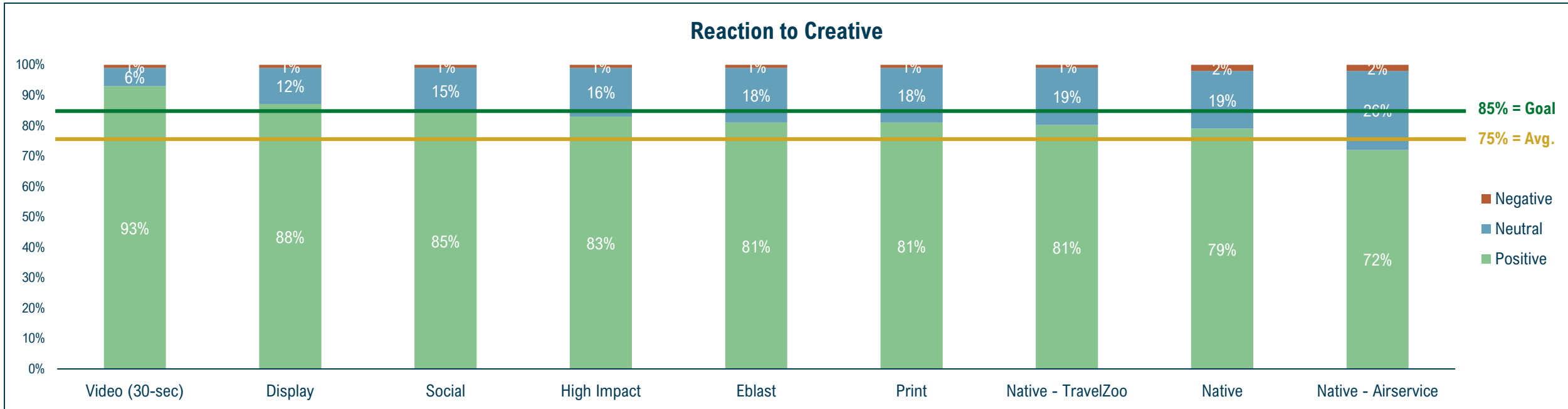


- Among all target consumers (snow and outdoor travelers) in the California and Nevada markets, the video ad received a very positive response, easily clearing the goal of 75%. The display assets also just reached the goal benchmark. The remaining ads fell above the average positive response rate, aside from the native air service ad.

Reaction to Creative

CA/NV Snow Travelers

Snow Travelers
Avg. = 75%
Goal = 85%

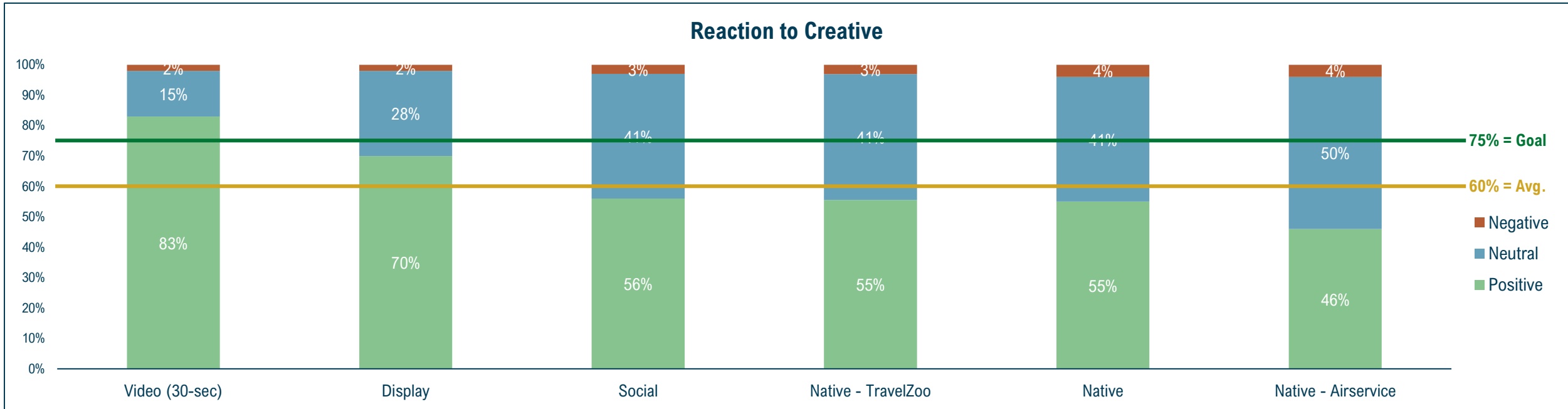


- Compared to general leisure campaigns, winter advertising is more highly targeted, meaning the ads are more likely to reach a receptive audience and, as a result, generate stronger ratings. To account for this, the creative reaction benchmarks for the snow traveler audience differ from those used for general leisure campaigns and are based on historical winter campaign performance.
- Among snow travelers, the creative earns much stronger ratings, with the video, display, and social assets reaching or surpassing the reaction goal. Only the native air service ad performed below the average.

Reaction to Creative

Denver Snow and Outdoor Travelers

All Travelers
Avg. = 60%
Goal = 75%

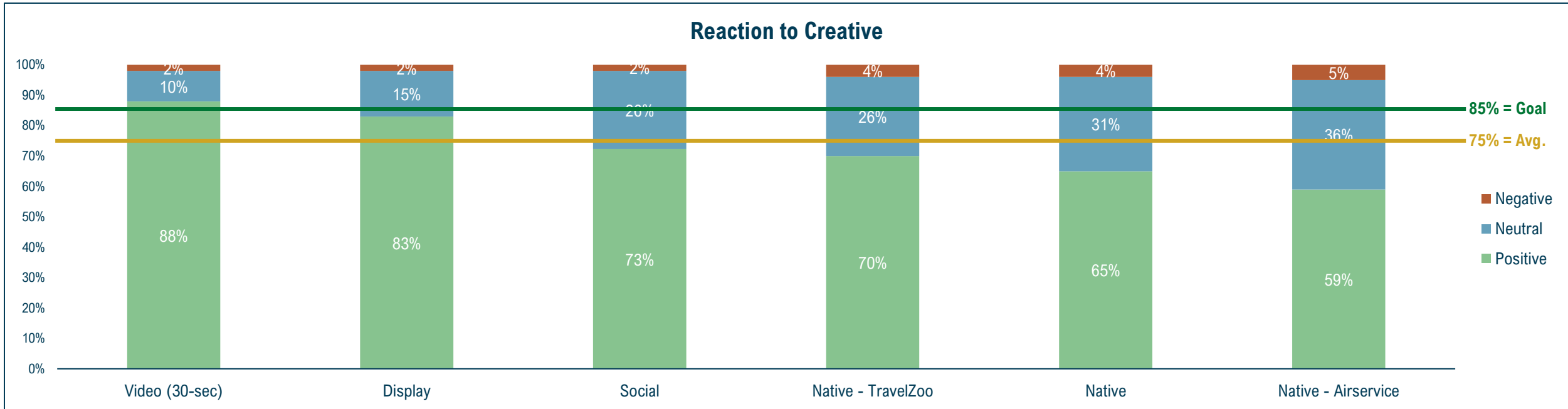


- The video asset reached the goal share of positive responses in the Denver market among the full audience. Aside from the video ad, the digital ads outperformed the average while the remaining assets tested below average with a large share of neutral responses.
- Denver is a challenging market to impress due to it having strong winter product as well.

Reaction to Creative

Denver Snow Travelers

Snow Travelers
Avg. = 75%
Goal = 85%

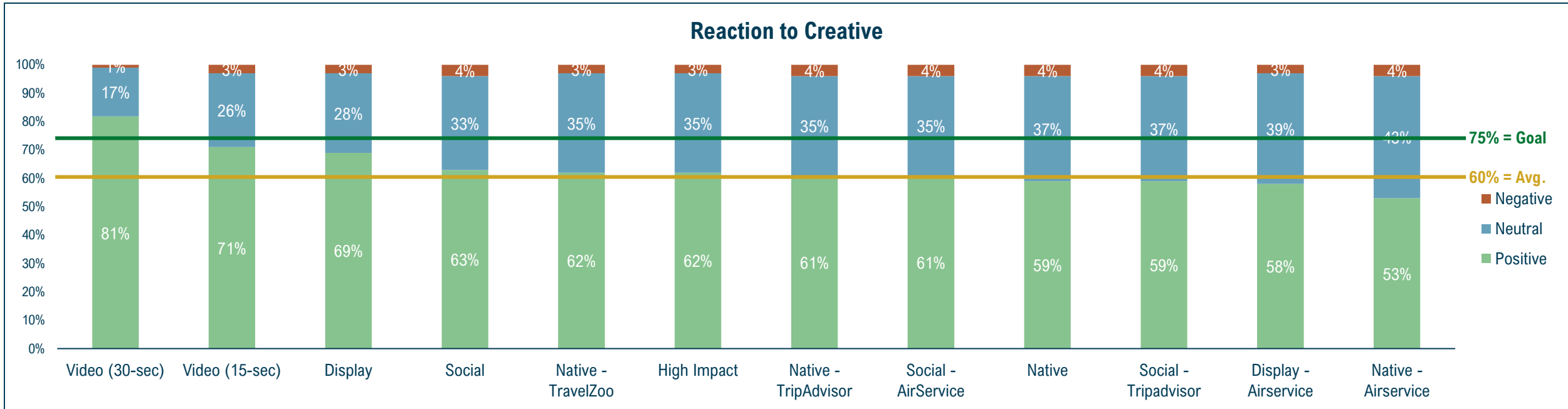


- The ads performed better in Denver among the snow traveling audience specifically. The video asset surpasses the goal benchmark among this audience, and the display ads come close.

Reaction to Creative

Northeast Snow and Outdoor Travelers

All Travelers
Avg. = 60%
Goal = 75%

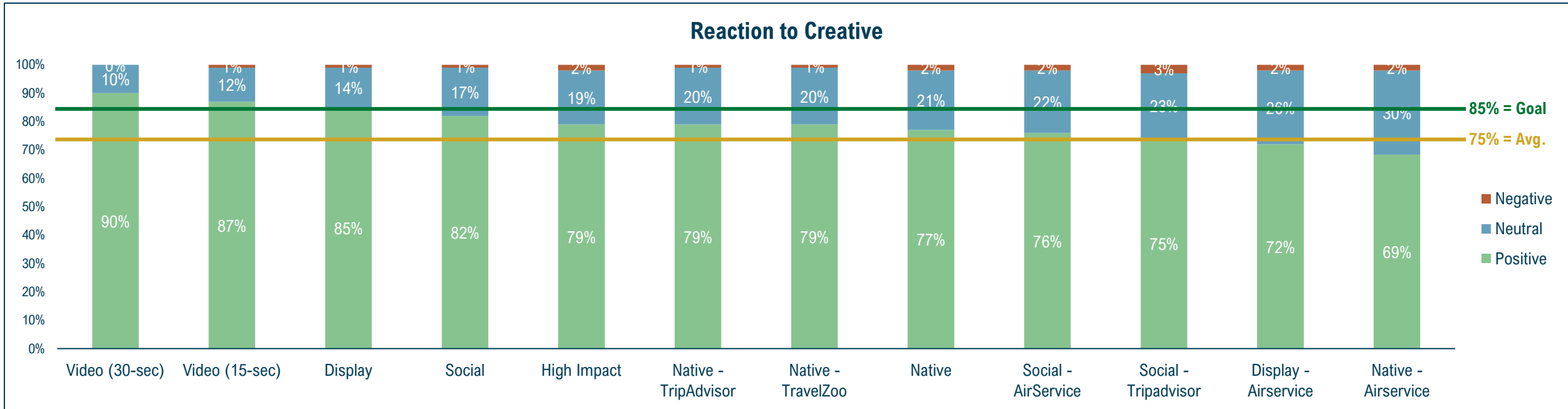


- The 30-second video surpassed the goal benchmark among the Northeast snow and outdoor travelers.
- The Native, social Tripadvisor, and the air service ads did not receive enough positive responses to reach the average benchmark in the Northeast.

Reaction to Creative

Northeast Snow Travelers

Snow Travelers
 Avg. = 75%
 Goal = 85%



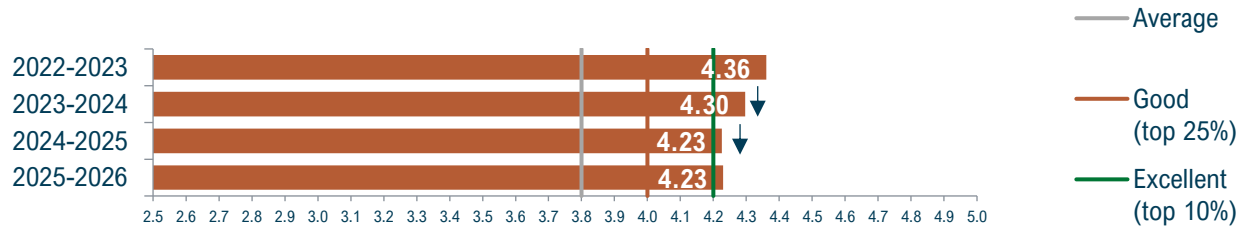
- Among snow travelers in the Northeast, the assets tested stronger – both video assets and the display ads reached the goal benchmark.
- Most of the other assets tested surpassed the average benchmark among snow travelers in the northeast, except for the display and native air service ads.

Creative Communication Ratings

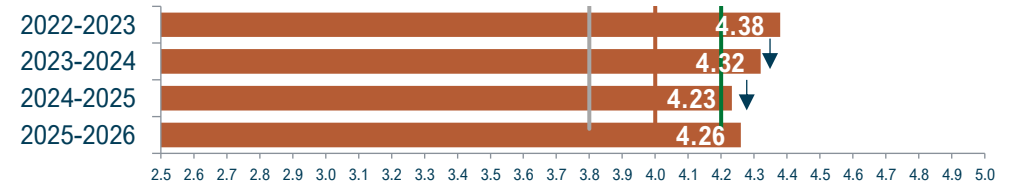
Snow and Outdoor Travelers

All Travelers Communication Ratings Benchmarks	
4.2 or above	= Excellent (top 10%)
4.0 – 4.199	= Good (top 25%)
3.8 – 3.99	= Average
Less than 3.8	= Below Average

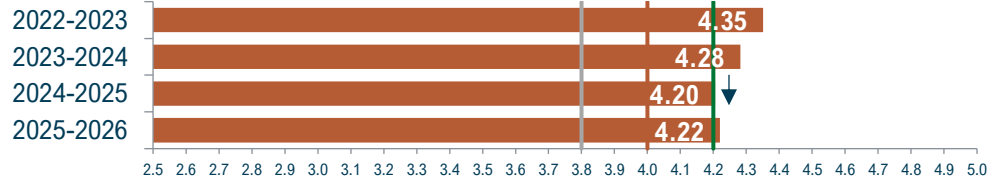
A place that offers an exhilarating environment and activities



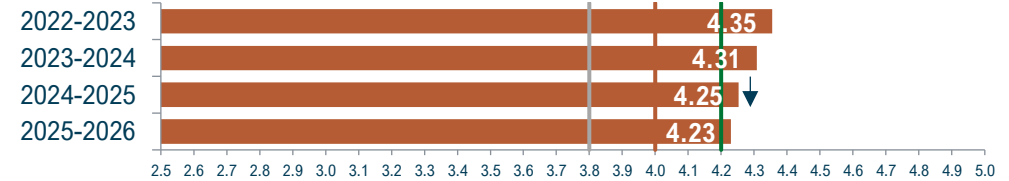
A place that inspires me to want to keep Mammoth Lakes beautiful



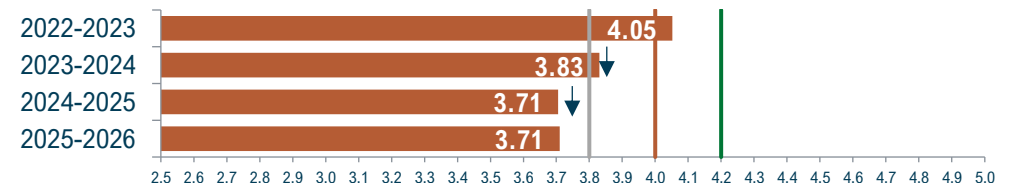
A place that exudes a sense of awe and wonder



An authentic outdoor playground



A place that I want to take a vacation to



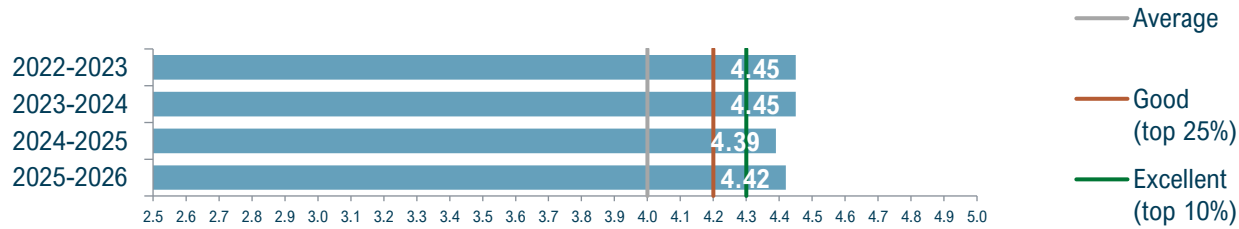
- Creative communication ratings were generally stable year over year and most are in the excellent range compared to industry norms.
- Among all travelers, ratings improved directionally for *a place that exudes a sense of awe and wonder* and *a place that inspires me to want to keep Mammoth Lakes beautiful*.
- Ratings held stable for *a place that offers an exhilarating environment* and *a place I want to take a vacation to*.

Creative Communication Ratings

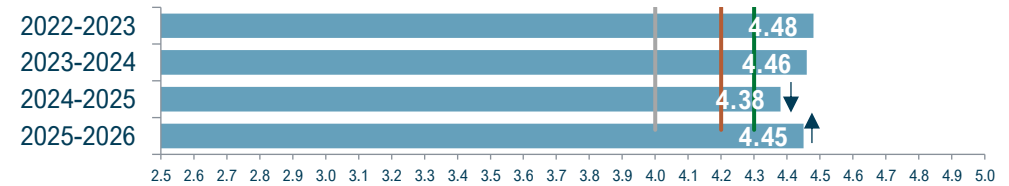
Snow Travelers

Snow Travelers Communication Ratings Benchmarks	
4.3 or above	= Excellent (top 10%)
4.2 – 4.299	= Good (top 25%)
4.0 – 4.199	= Average
Less than 4.0	= Below Average

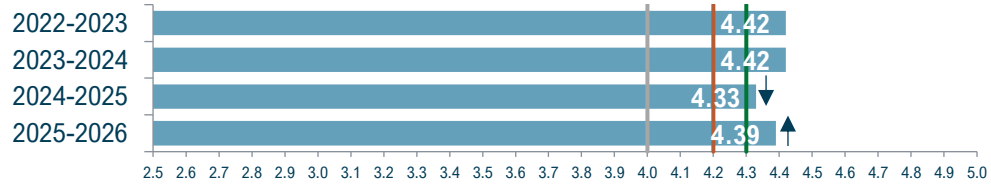
A place that offers an exhilarating environment and activities



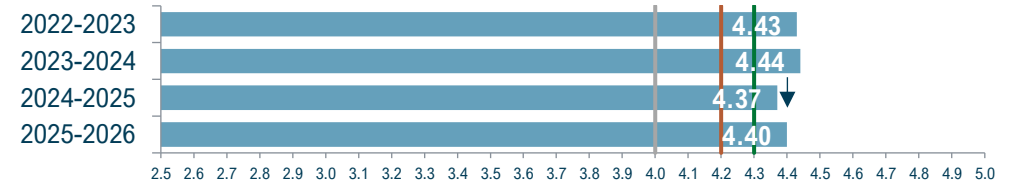
A place that inspires me to want to keep Mammoth Lakes beautiful



A place that exudes a sense of awe and wonder



An authentic outdoor playground



A place that I want to take a vacation to

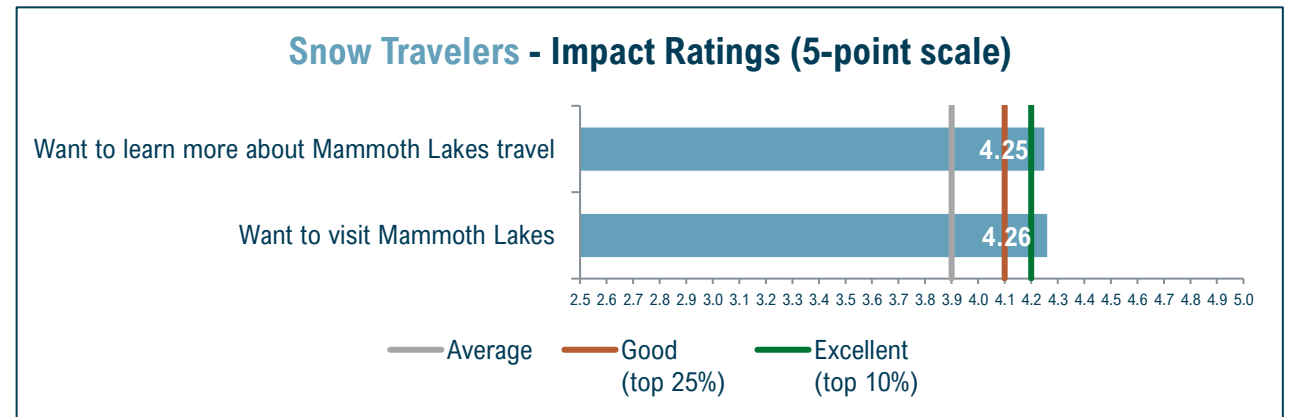
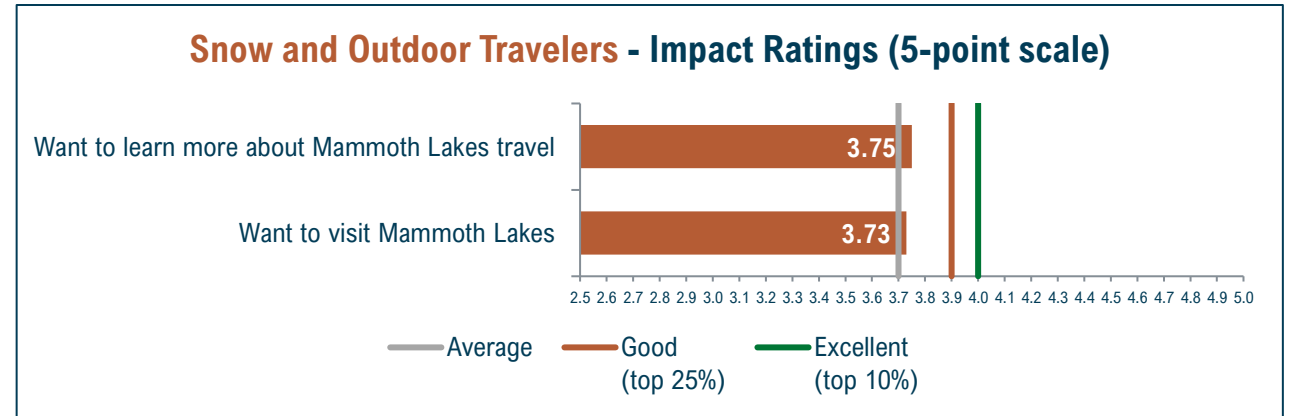


- As was the case with the overall reaction benchmarks presented earlier, there are snow campaign-specific benchmarks for creative communication ratings as well.
- Among snow travelers, creative ratings improved across the board after a decline the year prior.
- The gains for *a place that exudes a sense of awe and wonder*, *a place that inspires me to want to keep Mammoth Lakes beautiful*, and *a place that I want to take a vacation to* were all statistically significant.

Impact Ratings

All Travelers Impact Ratings Benchmarks	Snow Travelers Impact Ratings Benchmarks
4.0 or above = Excellent (top 10%)	4.2 or above = Excellent (top 10%)
3.9 – 3.99 = Good (top 25%)	4.1 – 4.199 = Good (top 25%)
3.7 – 3.89 = Average	3.9 – 4.099 = Average
Less than 3.7 = Below Average	Less than 3.9 = Below Average

- New impact rating questions were added this year to evaluate the ability of the campaign to influence traveler behaviors. SMARInsights has established separate creative rating benchmarks for impacts; it is harder to influence behavior, so the benchmarks are lower for these attributes.
- Again, there are different benchmarks for the snow audience versus the snow and outdoor audience.
- As has been the case throughout the report thus far, the creative rates better among the snow traveling audience.
- The ads surpass the excellent benchmark for making snow travelers *want to learn more about Mammoth Lakes travel* and *want to visit Mammoth Lakes*.
- Overall, the creative communication and impact ratings indicate that the *Real Unreal* campaign has not begun to wear out in its fourth year. SMARInsights typically sees signs of creative wear out in years four or five.



Creative Ratings by Market

Snow and Outdoor Travelers

- Travelers in California and Nevada are more positive about the creative than those in Denver or the Northeast.
- The ads are average at influencing travelers to want to *learn more about* or *visit Mammoth Lakes* in California and Nevada, but below average elsewhere.

All Travelers Communication Ratings Benchmarks
4.2 or above = Excellent (top 10%)
4.0 – 4.199 = Good (top 25%)
3.8 – 3.99 = Average
Less than 3.8 = Below Average

All Travelers Impact Ratings Benchmarks
4.0 or above = Excellent (top 10%)
3.9 – 3.99 = Good (top 25%)
3.7– 3.89 = Average
Less than 3.7 = Below Average

<u>Communication Ratings</u> How much do you agree that this content communicates that Mammoth Lakes is...	California and Nevada	Denver	Northeast (NYC + Boston DMAs)
A place that offers an exhilarating environment and activities	4.28	4.07	4.19
A place that inspires me to want to keep Mammoth Lakes beautiful	4.35	4.07	4.17
A place that exudes a sense of awe and wonder	4.27	4.06	4.19
An authentic outdoor playground	4.29	4.04	4.19
Like nothing I have seen or experienced before	3.74	3.35	3.77
A place that I want to take a vacation to	3.86	3.45	3.57
<u>Impact Ratings</u> How much do you agree that this content makes you want to...	California and Nevada	Denver	Northeast (NYC + Boston DMAs)
Learn more about Mammoth Lakes travel	3.86	3.43	3.68
Visit Mammoth Lakes	3.88	3.43	3.58

Creative Ratings by Market

Snow Travelers

- Among snow travelers, the ads rate as excellent in the California, Nevada, and Northeast markets.
- The ads rate lower among snow travelers from the Denver market but still achieve some top 25% ratings.

Snow Travelers Communication Ratings Benchmarks
4.3 or above = Excellent (top 10%)
4.2 – 4.299 = Good (top 25%)
4.0 – 4.199 = Average
Less than 4.0 = Below Average

Snow Travelers Impact Ratings Benchmarks
4.2 or above = Excellent (top 10%)
4.1 – 4.199 = Good (top 25%)
3.9 – 4.099 = Average
Less than 3.9 = Below Average

<u>Communication Ratings</u> How much do you agree that this content communicates that Mammoth Lakes is...	California and Nevada	Denver	Northeast (NYC + Boston DMAs)
A place that offers an exhilarating environment and activities	4.45	4.25	4.42
A place that inspires me to want to keep Mammoth Lakes beautiful	4.48	4.21	4.45
A place that exudes a sense of awe and wonder	4.41	4.21	4.39
An authentic outdoor playground	4.43	4.14	4.41
Like nothing I have seen or experienced before	3.95	3.49	3.93
A place that I want to take a vacation to	4.33	3.95	4.25
<u>Impact Ratings</u> How much do you agree that this content makes you want to...	California and Nevada	Denver	Northeast (NYC + Boston DMAs)
Learn more about Mammoth Lakes travel	4.28	3.92	4.27
Visit Mammoth Lakes	4.34	3.91	4.23

Advertising Impact

CALIFORNIA
WELCOME
CENTER
NEXT RIGHT

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Ad Impact on Mammoth Lakes Image

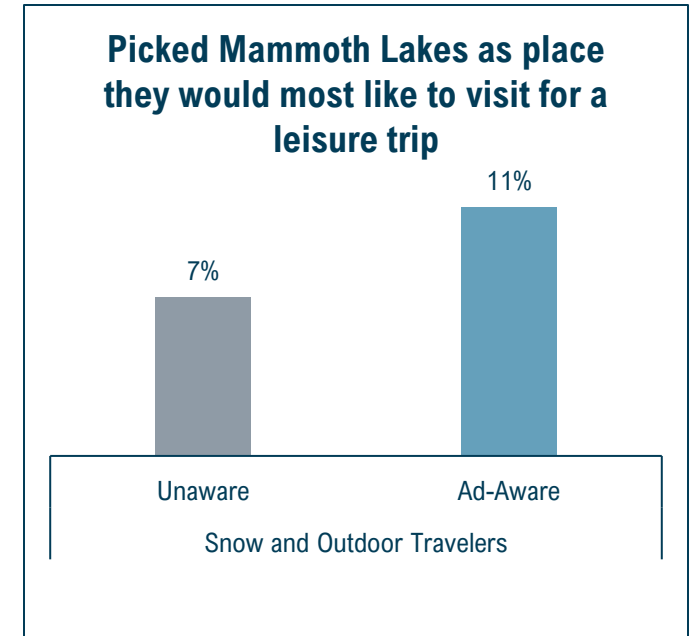
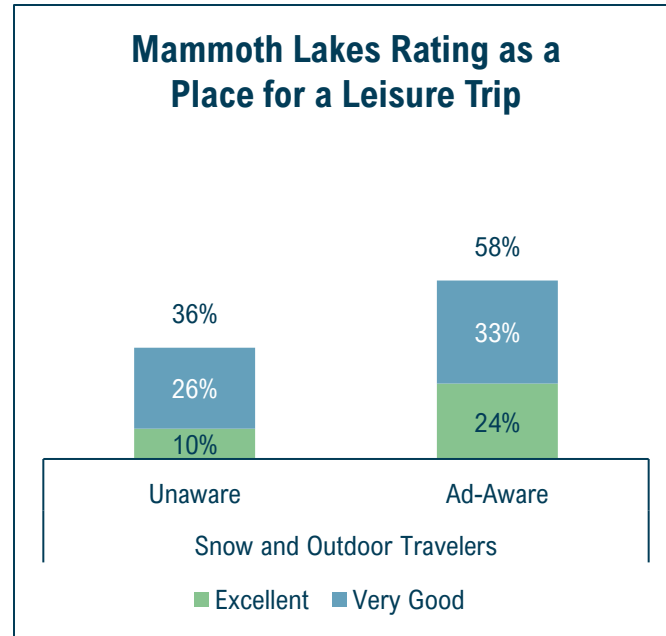
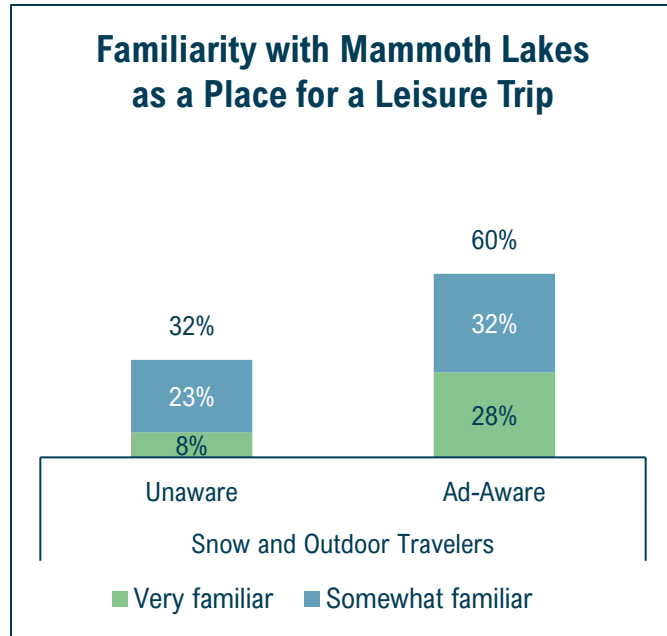


- Mammoth Lakes' image among ad-aware consumers is very strong – with all attributes rating above average compared to the benchmarks, except for *is unlike other destinations I've visited*, which earned an average rating.
- The advertising helps to build specific perceptions of Mammoth Lakes, especially as *an authentic outdoor playground, that has an abundance of diverse terrain, offers extraordinary sense of awe, and is welcoming and friendly* – all of which move from an average rating among those who do not recall the advertising to an excellent rating among the ad-aware.

Destination Ratings Benchmarks
4.0 or above = Excellent (top 10%)
3.75 – 3.99 = Good (top 25%)
3.5 – 3.749 = Average
Less than 3.5 = Below Average

	Unaware	Ad-Aware
Is a place I want to protect or keep beautiful	3.88	4.23
Is a destination for outdoor adventurers	3.84	4.17
Is majestic in scale and awesome in its natural beauty	3.76	4.09
Is an authentic outdoor playground	3.68	4.06
Has an abundance of diverse terrain	3.66	4.02
Offers an extraordinary sense of awe and feeling of exhilaration	3.63	4.05
Is welcoming and friendly	3.60	4.03
Offers an abundance of year-round activities right outside your door	3.59	4.00
Is rustic and rugged	3.56	3.80
Is inclusive to all	3.55	3.92
Is a destination that values sustainability and stewardship	3.53	3.98
Is unpretentious and down-to-earth	3.45	3.87
Is accessible to all	3.45	3.85
Is unlike other destinations I've visited	3.31	3.63

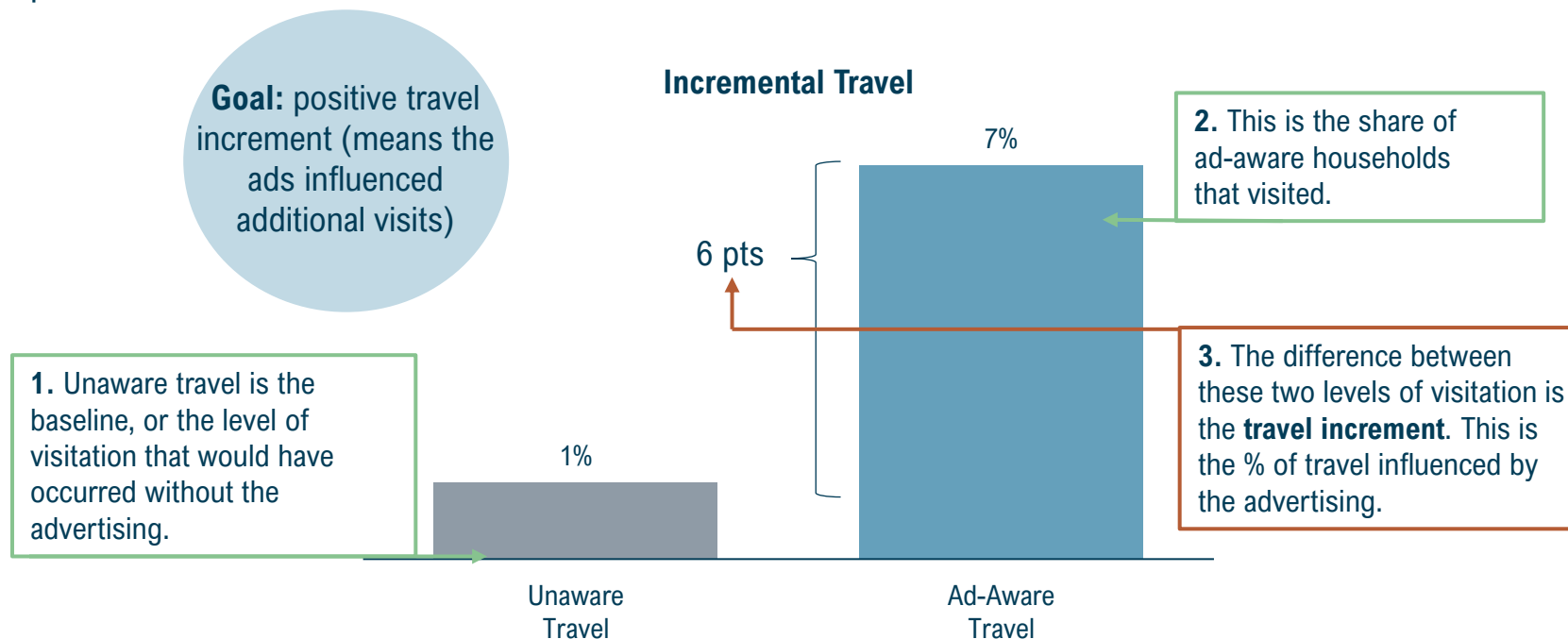
Winter 2025-2026 Ad Impact on Perceptions



- While the primary goal of the advertising is to drive trips during the current season, it also creates a lasting impact by shaping perceptions of the destination over time.
- Consumers who are aware of the advertising are more familiar with the destination, view it more positively as a place to visit, and are more likely to choose Mammoth Lakes as their preferred destination. These improved perceptions are expected to support future visitation and extend the long-term effectiveness of the campaign.

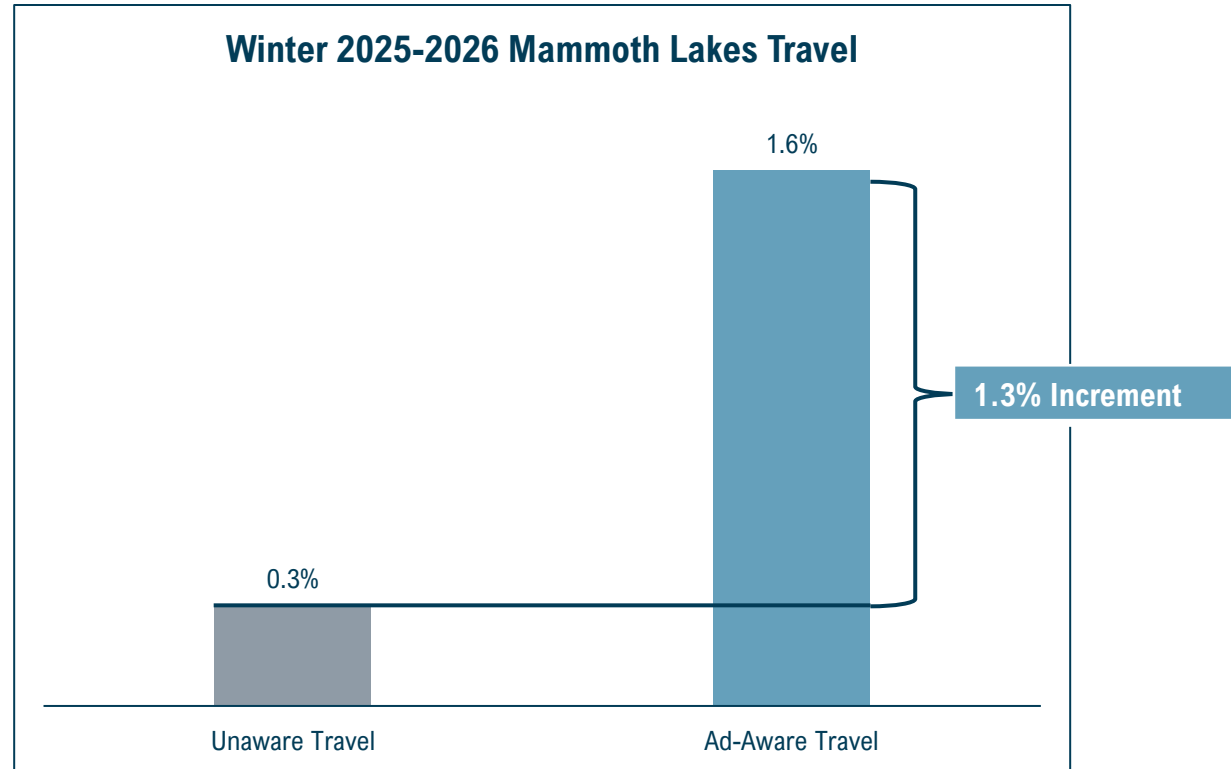
Incremental Travel Review

- The graphic below is an example of how SMARInsights measures incremental or ad-influenced travel.
- 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.
- A conservative visitor definition was employed in the measure of incremental travel. Specifically, we do not count regular visitors (more than 3 times in the past year), those with family or friends in the area, those attending an event, or Mammoth Lakes homeowners as potentially influenceable trips.



Winter 2025-2026 Incremental Travel

- The increment this year is 1.3%, which is slightly lower than the 1.7% increment last year (not shown).



Winter 2025-2026 ROI

- When the increment is applied to the 3.5 million ad aware households, the result is more than 46,000 ad-influenced trips to Mammoth Lakes this winter.
- This equates to \$103 million in ad-influenced visitor spending and an ROI of \$124 for each \$1 of media spending.

Total	Winter 2025-2026
Target HHs	10,646,149
Ad Awareness	33%
Ad-Aware HHs	3,561,953
Incremental Travel	1.3%
Ad-Influenced Trips	46,305
Avg. Trip Spending	\$2,234
Ad-Influenced Visitor Spending	\$103,434,128
Media Investment	\$836,091
ROI	\$124

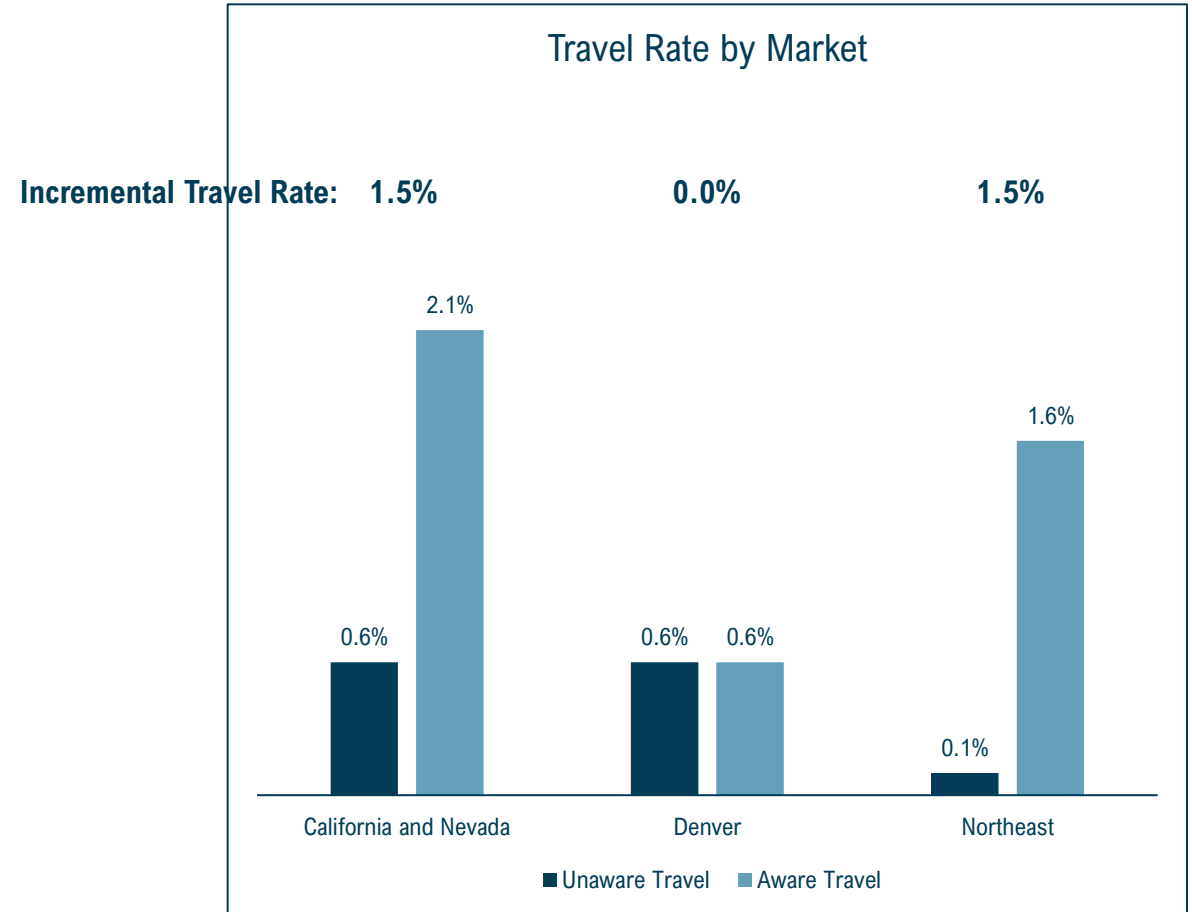
Winter ROI Change

- Though the reach was slightly lower and the incremental travel rate saw a slight decline, the campaign maintained its efficiency with an ROI of \$124, compared to \$130 last year.
- A slight decline in awareness and the lower incremental travel rates result in a 28% decline in ad-influenced trips this year.
- Higher average trip spending helped to limit the decline in ad-influenced visitor spending.

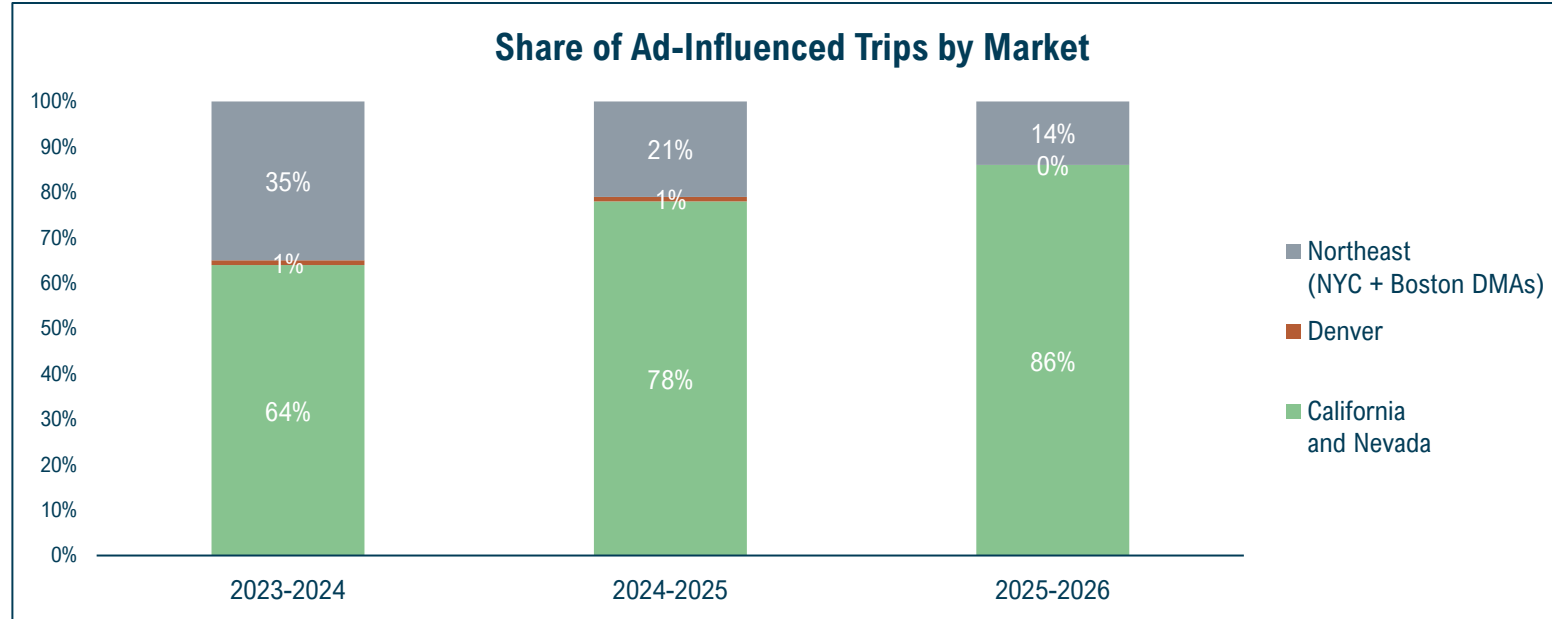
	2023-2024	2024-2025	2025-2026	% Change
Target HHs	10,598,628	10,646,149	10,646,149	0%
Ad Awareness	35%	36%	33%	-7%
Ad-Aware HHs	3,745,632	3,863,203	3,561,953	-8%
Incremental Travel	2.5%	1.7%	1.3%	-24%
Ad-Influenced Trips	94,216	64,177	46,305	-28%
Avg Trip Spend	\$2,020	\$2,027	\$2,234	10%
Ad-Influenced Visitor Spending	\$190,324,432	\$130,085,438	\$103,434,128	-20%
Media Investment	\$1,240,486	\$1,000,389	\$836,091	-16%
ROI	\$153	\$130	\$124	-5%

Travel Rates by Market

- The California and Nevada markets have the strongest ad-aware and incremental travel rates.
- While California/Nevada and Denver have the same baseline (unaware) travel rate, Colorado continues to be a challenging market to a low rate of ad-aware travel.
- The unaware rate of travel from the Northeast is low, which means more opportunity to influence travel from these less familiar but receptive markets.



Ad-Influenced Trip Tracking by Market

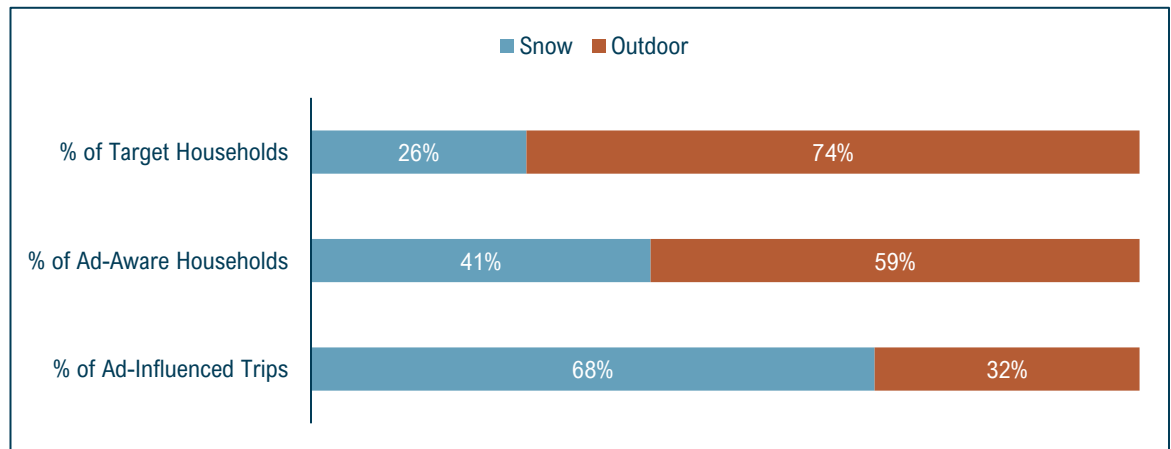


- The Northeast market accounted for a smaller share of trips this year, likely the result of a great snow year on the east coast encouraging these travelers to stay local.
- Denver remains a challenging market to draw travel from. While there were no trips influenced from Denver this year, the market has not accounted for more than 1% of total ad-influenced trips since 2023-2024.
- The shifts above have contributed to California and Nevada accounting for a larger share of trips each year since 2023-2024.

Influence by Snow and Outdoor Travelers

- Snow travelers are notably more aware of the advertising than non-snow travelers and the ads generated a greater level of influence among snow travelers.
- While snow travelers only represent about a quarter of the target households, they account for 41% of ad-aware households and more than two-thirds of all ad-influenced trips this winter.

	Snow	Outdoor	Total
Target HHs	2,741,988	7,904,161	10,646,149
Ad Awareness	54%	26%	33%
Ad-Aware HHs	1,469,194	2,092,759	3,561,953
Incremental Travel	2.2%	0.7%	1.3%
Ad-Influenced Trips	31,676	14,629	46,305
Avg Trip Spend	\$2,289	\$2,114	\$2,234
Ad-Influenced Visitor Spending	\$72,508,015	\$30,926,113	\$103,434,128

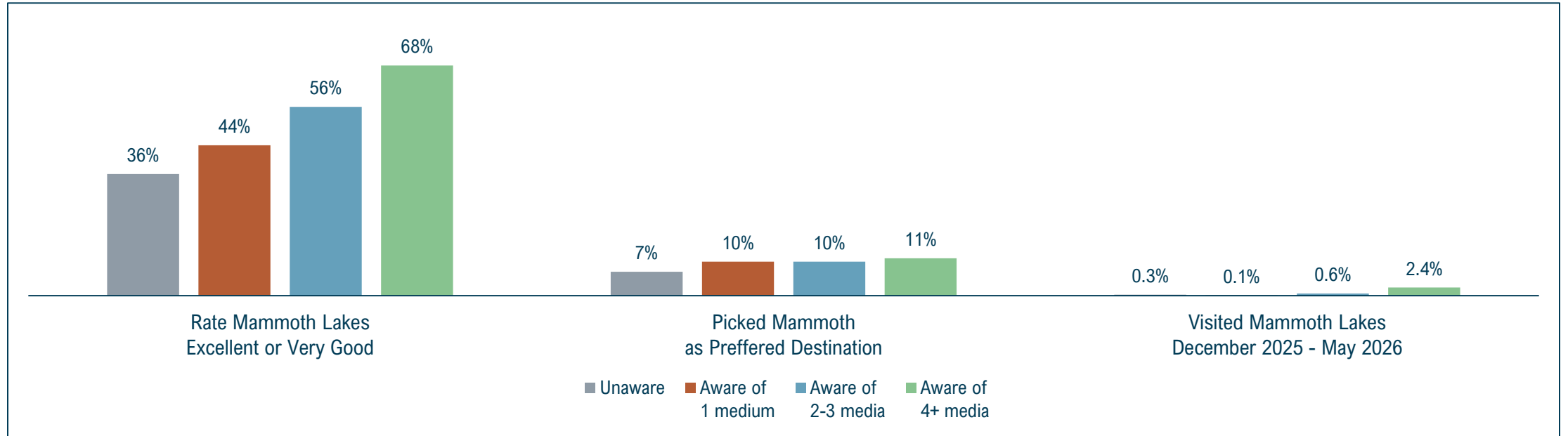


ROI with Snow Travelers Only

- If only snow travelers were counted in the advertising influence and ROI calculations, we would see about 15,000 fewer influenced trips, \$31 million less ad-influenced visitor spending, and a lower ROI.

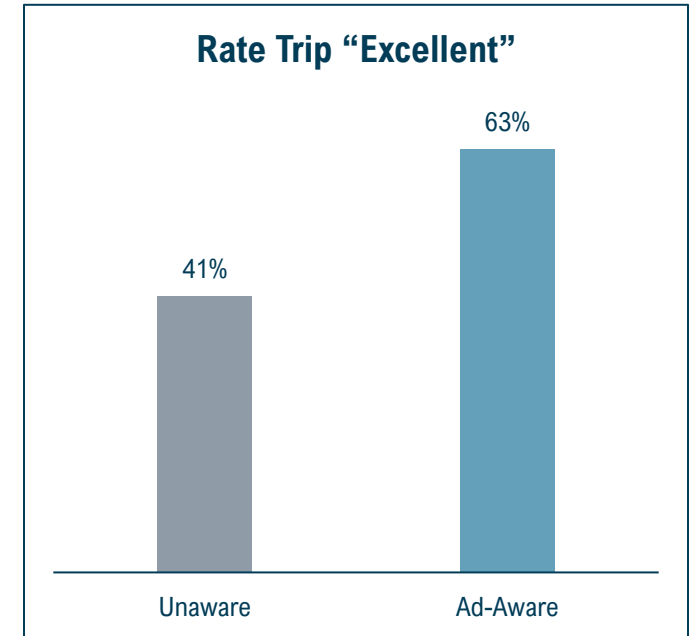
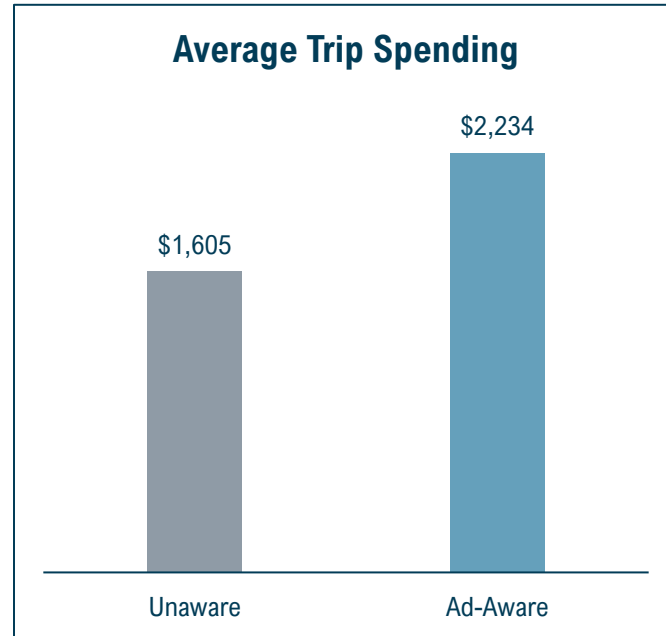
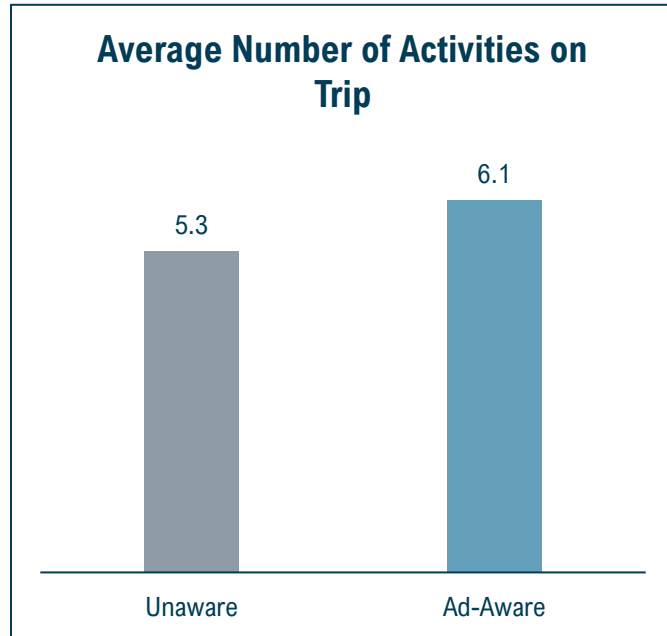
	Snow Travelers Only	Snow and Outdoor Travelers
Target HHs	2,741,988	10,646,149
Ad Awareness	54%	33%
Ad-Aware HHs	1,469,194	3,561,953
Incremental Travel	2.2%	1.3%
Ad-Influenced Trips	31,676	46,305
Avg Trip Spend	\$2,289	\$2,234
Ad-Influenced Visitor Spending	\$72,508,015	\$103,434,128
Media Investment	\$836,091	\$836,091
ROI	\$87	\$124

Winter 2025-2026 Media Overlap Impact



- We previously reviewed that the 2025-2026 campaign generated a great deal of media overlap.
- Here we see that overall rating, preference, and travel all increase when consumers are exposed to ads in multiple media. Overlap helps to strengthen the impacts of the campaign and should continue to be prioritized in future media plans.
- The importance of overlap in influencing travel can be seen as the unaware travel rate is higher than those who are aware of ads in only one medium.

Winter 2025-2026 Ad Impact on the Trip



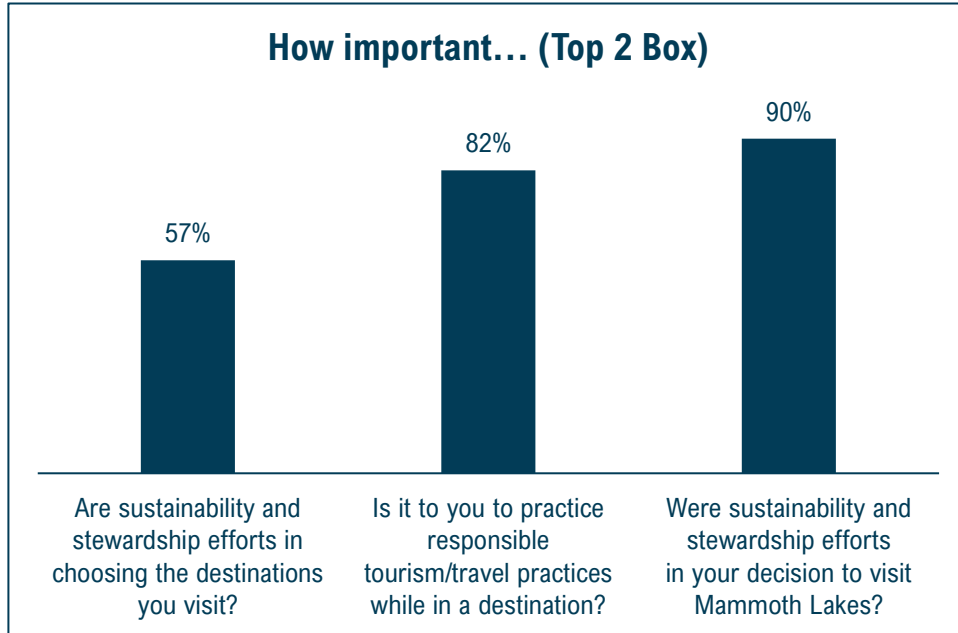
- The advertising also encourages people to participate in more activities on their trip – and this supports higher spending.
- Additionally, ad-aware visitors are much more likely to rate their trip as excellent.

Tactical Issues

CALIFORNIA
WELCOME
CENTER
NEXT RIGHT

SMARinsights

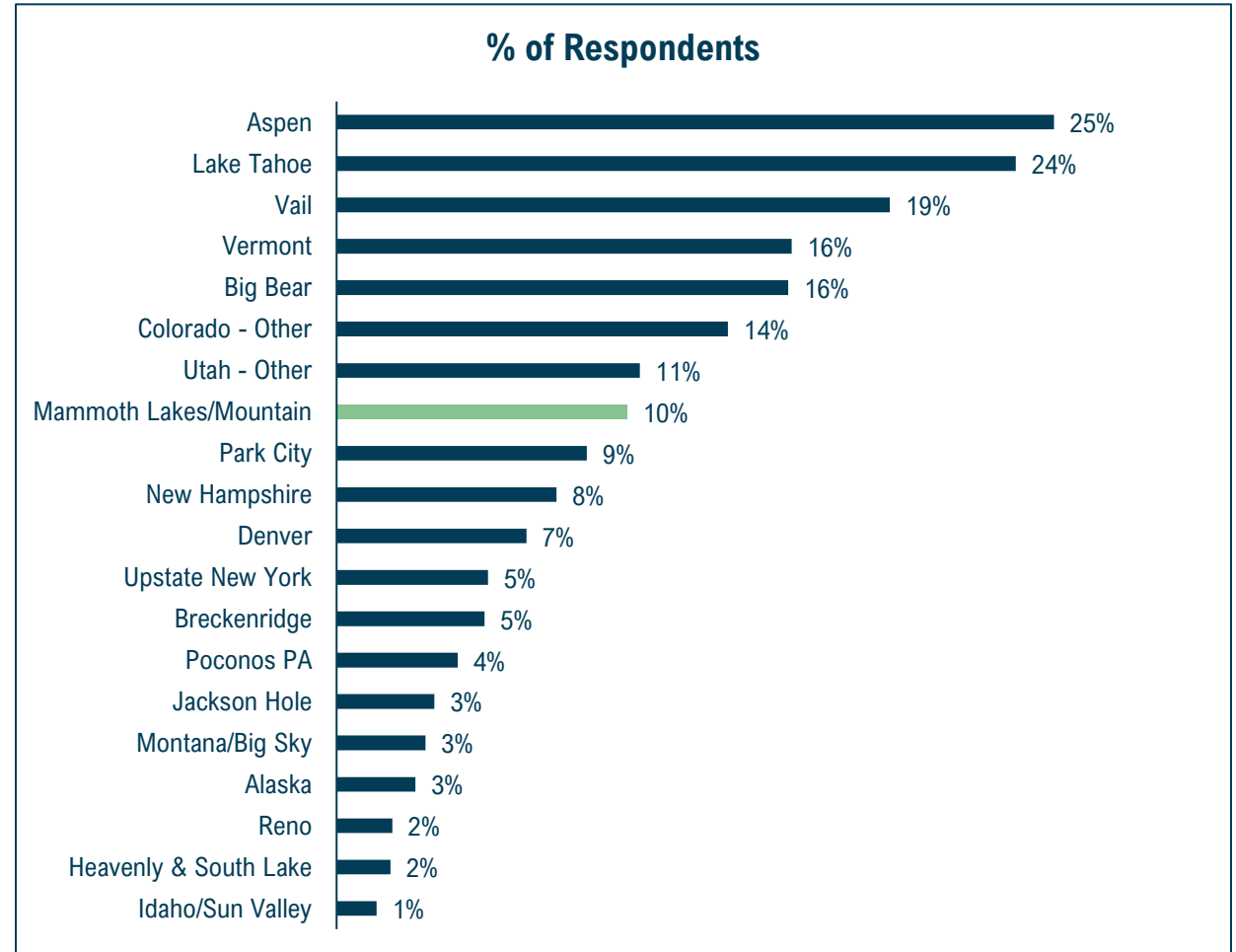
Sustainability



- Sustainability efforts are important to over half the audience when choosing a destination to visit, and 82% say that they practice responsible tourism practices while in a destination. The importance is magnified with Mammoth Lakes visitors, as 9 in 10 indicate that sustainability played a role in their decision to visit the destination.
- The top sustainability actions taken when traveling for leisure are respecting local cultures and supporting local businesses, though most also practice mindfulness of resource usage and seek to reduce waste. A third of travelers say they take public transportation while traveling.

Top-of-Mind Recall

- Before respondents were asked about Mammoth and its competitors, they were asked which ski/snowboard destinations in the US come to mind. Respondents were able to name up to five locations.
- Roughly a quarter of respondents mentioned Aspen and Lake Tahoe, which were the clear leaders in top-of-mind recall.
- 10% of respondents mentioned Mammoth Lakes, which outperforms other well-known destinations like Park City, Denver, Breckenridge and even entire states like New Hampshire, Montana, Alaska, and Idaho.



Motivating Activities

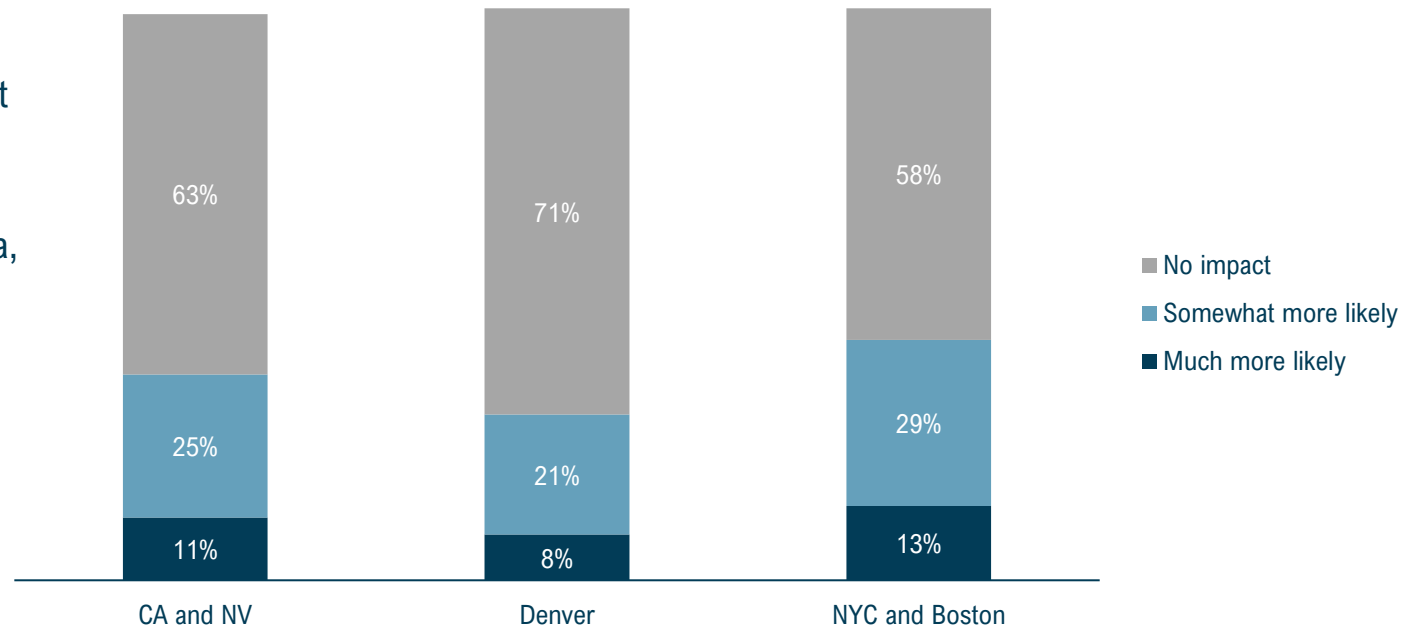
- The specific activities that are the most prevalent Mammoth winter trip motivators include *snowboarding/skiing, sightseeing, visiting unique geological formations, and local shopping and dining.*
- These activities should be considered when developing future creative content due to their broad motivational appeal.

Mammoth Lakes Trip Activity (December 2025 - May 2026 Trips)	Participate %	Motivate % (among participants)	Net Motivate %
Downhill skiing/snowboarding	60%	85%	51%
Sightseeing	63%	75%	48%
Visiting geological formations unique to the area	49%	85%	42%
Local shopping	59%	55%	32%
Local dining	65%	49%	32%
Cross country skiing/snowboarding	34%	77%	26%
High altitude training	38%	58%	22%
Visiting National Park locations/Monuments	40%	53%	21%
Live Music/Music Events	37%	50%	19%
Health & wellness	27%	47%	12%
Brewery & spirit tasting	24%	45%	11%
Arts & Culture Events	21%	49%	10%
Community Events	20%	42%	9%
Visiting rural areas/small towns	32%	26%	8%
Athletic Events	18%	42%	8%

Air Service Availability & Likelihood to Visit

- The availability of air service to Mammoth Lakes has no impact on likelihood to visit for a majority of travelers in each market.
- Still, about 40% of travelers in the Northeast indicate that air service availability makes them at least somewhat more likely to visit.
- Air service availability has less of an impact on likelihood in Denver than in California and Nevada, again demonstrating that this is a challenging market to attract.

How does the availability of air service to Mammoth Lakes impact your likelihood to visit?



Barriers

- This year, three new barriers were added to the questionnaire – *not a good value for the price, too crowded, and unreliable snow conditions*. These new barriers are less impactful than most of the returning barriers.
- The barrier posed by *gas prices* doubled from last year in response to the current economic situation.

	2024-2025	2025-2026	Change
Doesn't fit the type of travel experience I am seeking	36%	40%	3%
Too expensive to travel there	27%	31%	4%
Gas prices	15%	30%	15%
General inflation	21%	23%	3%
Flight prices	19%	23%	3%
Uncertainty about the future	20%	19%	0%
Too difficult to access (e.g. limited flights, etc.)	14%	12%	-2%
Not a good value for the price	NA	10%	NA
The state's politics	9%	8%	-1%
Too crowded	NA	6%	NA
Unreliable snow conditions	NA	4%	NA
Unwelcoming atmosphere	3%	2%	-1%
None of these	17%	19%	2%

Appendix: Questionnaire



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Questionnaire

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Mammoth Lakes, California (Shipyard)
2025-26 Ad Effectiveness WINTER

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, Max (formerly HBO Max), or Hulu		
I engage in skiing, snowmobiling and/or other outdoor winter activities		
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, X (formerly 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)		
I enjoy being outdoors in nature		

TERMINATE IF NOT WINTER OR OUTDOOR ACTIVITIES

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

[END OF SCREENERS]

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TOP OF MIND AWARENESS

Q1a. Thinking about ski/snowboard destinations, what mountain towns, cities, or resort areas in the U.S. come to mind?

COMPETITIVE SET QUESTIONS

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

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

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[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 2025?

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]					

ASK Q5A AND Q5B IF NOT AT ALL OR NOT VERY LIKELY TO VISIT MAMMOTH

Q5a. Why are you ANSWER FROM Q5 to visit Mammoth Lakes, CA in the next year for a leisure trip? _____

Q5b. Are any of these reasons that you are ANSWER FROM Q5 to visit Mammoth Lakes, CA in the next year for a leisure trip? ROTATE

- Too difficult to access (e.g. limited flights, etc.)
- Doesn't fit the type of travel experience I am seeking
- Too expensive to travel there
- General inflation
- The state's politics

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Questionnaire

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Gas prices
Flight prices
Uncertainty about the future
Unwelcoming atmosphere
Unreliable snow conditions
Too crowded
Not a good value for the price
None of these ANCHOR

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.

- Take public transportation
- Respect nature and local environment (Stay on trails, follow local guidelines, "leave no trace"/clean up after yourself)
- Buy from and support local businesses
- Reduce waste (skip single-use plastic, bring reusable water bottle, etc.)
- Mindfulness of resource use (reuse towels/linens, turn off lights when not using, shorter showers)
- Other (Specify)

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Q8. 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					
Offers an extraordinary sense of awe and feeling of exhilaration					
Is rustic and rugged					
Is unpretentious and down-to-earth					
Is unlike other destinations I've visited					
Is welcoming and friendly					
Is inclusive to all					
Is accessible to all					

ASK OF ENTIRE BASE.

Q6A_1. Are you aware of air service options to access the Mammoth Lakes? YES/NO

Q6A_2. How does the availability of air service to Mammoth Lakes impact your likelihood to visit?
Much more likely

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Somewhat more likely
No impact
Somewhat less likely
Much less likely

T1a. Are you an IKON pass holder?
Yes
No

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Questionnaire

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VISITATION

VISITOR ANSWERED YES TO Q4A_1

T1. When during the following months did you travel to Mammoth Lakes for a leisure trip? [SHOW MONTHS DECEMBER 2025 – MAY 2026] *Select all that apply.*

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. 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

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

[ASK IF T7=Flew] Which airport did you fly into?

Mammoth Yosemite Airport (MMH)
Eastern Sierra Regional Airport (BIH)
Don't Know
Other, please specify

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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"
Food & Beverage
Attractions & Activities
Shopping & Retail
Transportation during your trip

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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]

Skiing & Snowsport
Downhill skiing/snowboarding
Cross country skiing/snowboarding
Other snow sport, specify _____
Viewing & Enjoying Natural Scenery
Visiting geological formations unique to the area
Sightseeing
Other, specify _____
Outdoor Activities
High altitude training
Other outdoor activity, specify _____
Special Events
Live Music/Music Events
Arts & Culture Events
Athletic Events
Community Events
Other event, specify _____
Other Activities
Visiting rural areas/small towns
Brewery & spirit tasting
Health & wellness
Local dining
Local shopping
Visiting National Park locations/Monuments
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.*

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Questionnaire

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

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

T13a. What specifically caused you to rate your experience as ANSWER FROM T13? _____

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, X (formerly Twitter), Instagram, etc.)
- Online traveler reviews
- Travel guide, visitor planning guide
- Travel agent
- Travel blog
- Ski-snowboard website
- Trade show

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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

AD AWARENESS

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

VIDEO

ALL MARKETS

NE MARKET ONLY



<https://vimeo.com/1185234142>

<https://vimeo.com/1185234258>

DISPLAY

CA/NV MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\Display Banners\USE

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Questionnaire

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DENVER MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Denver\Display Banners\USE



MO General (1).jpg



AllStar Display (1).jpg



MO Snow Count.jpg

NORTHEAST MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Display Banners\USE



Mammoth Lakes 300.jpg



Mammoth Lakes 300.jpg



Mammoth Lakes 300.jpg



Mammoth Lakes 300.jpg



Mammoth Lakes 300.jpg



On the Snow 300.jpg



On the Snow 300.jpg

AIRSERVICE

SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Display Banners\USE AIR

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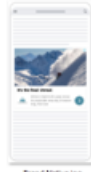


AirService 100x100.jpg

NATIVE DISPLAY

CA/NV & DENVER MARKETS

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Brand Native.jpg



Family Native.jpg



Midweek Native.jpg

AIRSERVICE

SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\Native\USEAIR



AirService Native.jpg

TRAVELZOO

SHOW ON A SEPARATE SCREEN

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I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\Native\USETRAVELZOO



Travelzoo CPC Native Screenshot.jpg

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Questionnaire

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NORTHEAST MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Native\USE



TRIPADVISOR

SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Native\TRIPADVISOR



AIRSERVICE

SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Native\USEAIR



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TRAVELZOO

SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Native\USETRAVELZOO



EBLAST

CA\NV MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\Eblast\USE



HIGH IMPACT UNIT

CA\NV & NORTHEAST MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\High Impact Unit\USE



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SOCIAL

CA\NV MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\Social\USE



DENVER MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Denver\Social\USE



NORTHEAST MARKETS

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Social\USE



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Questionnaire

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AIRSERVICE
SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Social\USEAIR



TRIPADVISOR
SHOW ON A SEPARATE SCREEN

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\Northeast\Social\USETRIPADVISOR



PRINT
CA/NV MARKETS ONLY

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker\CA+NV\Print



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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? _____

communicationgrid. 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					

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An authentic outdoor playground					
Is unlike other destinations I've visited					
A place that I want to take a vacation to					

Impact grid. How much do you agree that this content makes you want to...

ROTATE	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Learn more about Mammoth Lakes travel					
Visit Mammoth Lakes					

ADD "WHY" FOLLOW-UP IF THEY DON'T AGREE THAT THE ADS MAKE THEM WANT TO TAKE A TRIP TO MAMMOTH

IF STRONGLY DISAGREE OR DISAGREE TO IMPACT GRIDE 2, ASK:

Why do you [ANSWER FROM IMPACT GRID] that the ads make you want to take a trip to Mammoth Lakes?

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

I:\Ads Master\Mammoth Lakes\Winter 2026\Winter Ad Tracker\Winter Ad Tracker

Questionnaire

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MKT 2023 Visitor Guide Cover.png

[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
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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
- X (formerly Twitter)
- Tik Tok
- YouTube
- Pinterest
- Other
- Do not follow Visit Mammoth on any social channels



CURRENT SITUATION

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C1. Think about your recent travel plans with the U.S. Which of these apply to you?

ROTATE, ANCHOR NONE	
I have canceled a leisure trip	
I have postponed a leisure trip	
I have decided to visit a location closer to home rather than a more distant destination	
None of these EXCLUSIVE	

C2. What impact is each of these currently having on your leisure travel plans?

ROTATE	Strong negative impact	Negative Impact	No Impact	Positive Impact	Strong Positive impact
The U.S. economy					
General inflation and rising costs					
Domestic politics					
Global conflicts and tensions					
Gas prices					
Flight prices					
Hotel/lodging prices					
Health and safety perceptions					
Flight safety					
Trade wars and tariffs					
Uncertainty about the future					
Climate change and extreme weather					
Discrimination towards minorities					

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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 PPHINHH>1]

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? Are you...?

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Questionnaire

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Select all that apply.

- African-American/Black
- Asian
- American Indian or Alaska Native
- Caucasian/White
- Hispanic/Latino
- Middle Eastern or North African
- Native Hawaiian or Other Pacific Islander
- Other, please specify

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