



Mammoth Lakes
CALIFORNIA

2025 End of Year Advertising Effectiveness Research

December 2025

SMARInsights

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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 FY24-25 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 advertising.

Methodology

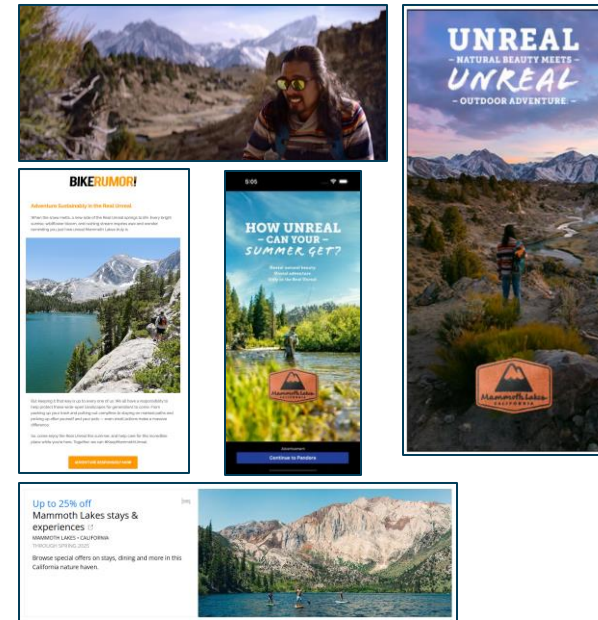
- SMARInsights' advertising effectiveness methodology requires respondents to view the actual ads to measure awareness; therefore, an online survey was used to present the advertising to consumers. National sample vendors with representative panels ensured the results could be reliably projected to the broader population.
- Ads were tested in the markets where MLT ran creative. California and Nevada were tested for both waves, while Denver and the Northeast were tested for the Winter wave only. SMARInsights developed the sampling plan based on how the media was placed in these markets.
- For the latest wave, 1,006 interviews were completed between November 19-27, 2025. To qualify for the survey, respondents had to be travel decision-makers who:
 - Are over the age of 18;
 - Regularly take overnight leisure trips of at least 50 miles from home; and
 - Either engage in outdoor activities or have taken an outdoor, nature-focused vacation in the spring, summer, or fall.
- The following report summarizes research results and combines findings with the Winter ROI measure to provide a fiscal year ROI.

Completed Surveys		
	Winter	Summer/ Fall
CA+NV	1,502	1,006
Denver	501	
Northeast	1,002	
TOTAL	3,005	1,006

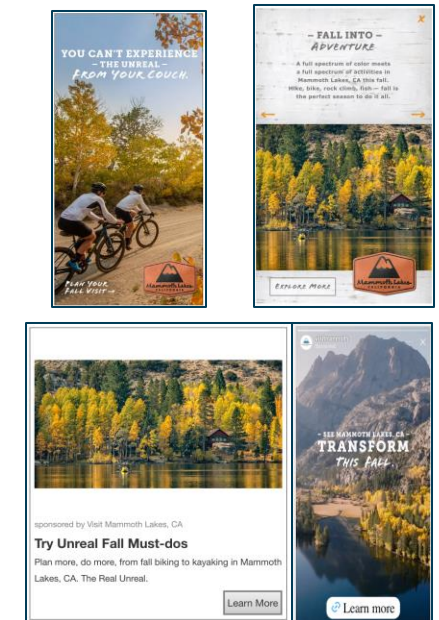
Campaign Overview

- The first wave of research focused on the Winter advertising campaign, which had a total investment of \$1 million.
- In this second wave of research, we focus on the 2025 Summer/Fall campaigns that had a total investment of \$678,665.
- The Summer campaign featured digital banners, social media, native display, video, digital audio, rich media, and an e-blast. It ran from mid-April through August.
- The Fall campaign included digital banners, social media, native display, rich media, and video Instagram Stories, running from mid-August through October.
- This report will include a Return on Investment for the 2025 Summer/Fall advertising, as well as a full-year ROI that includes the first wave results from Winter 2024. The combined media budget for the full year campaign totals \$1,679,054.

2025 Summer Advertising



2025 Fall Advertising



Season	Media Investment
Winter 2024 (Wave 1)	\$1,000,389
Summer/Fall 2025 (Current Wave)	\$678,665
Full Year	\$1,679,054

Insights

Summer/Fall Campaign Reach and Influence

- MLT's 2025 Summer/Fall advertising was efficient, reaching **over 3 million ad-aware households** on a media budget of \$678,665. This results in a **cost per aware household of \$0.22, which is more efficient than SMARInsights' average benchmark** for similar campaigns (\$0.32).
- The 2025 Summer/Fall advertising ultimately **influenced more than 45,000 trips and \$78 million in visitor spending**, which equates to an ROI of \$116 for each \$1 invested in the media.

Total FY24-25 Return on Investment

- Combined, the FY24-25 campaigns (Winter, Summer/Fall) **influenced 109,000 trips and \$208 million in visitor spending**. This translates to an ROI of \$124 in visitor spending for each \$1 invested in the media.

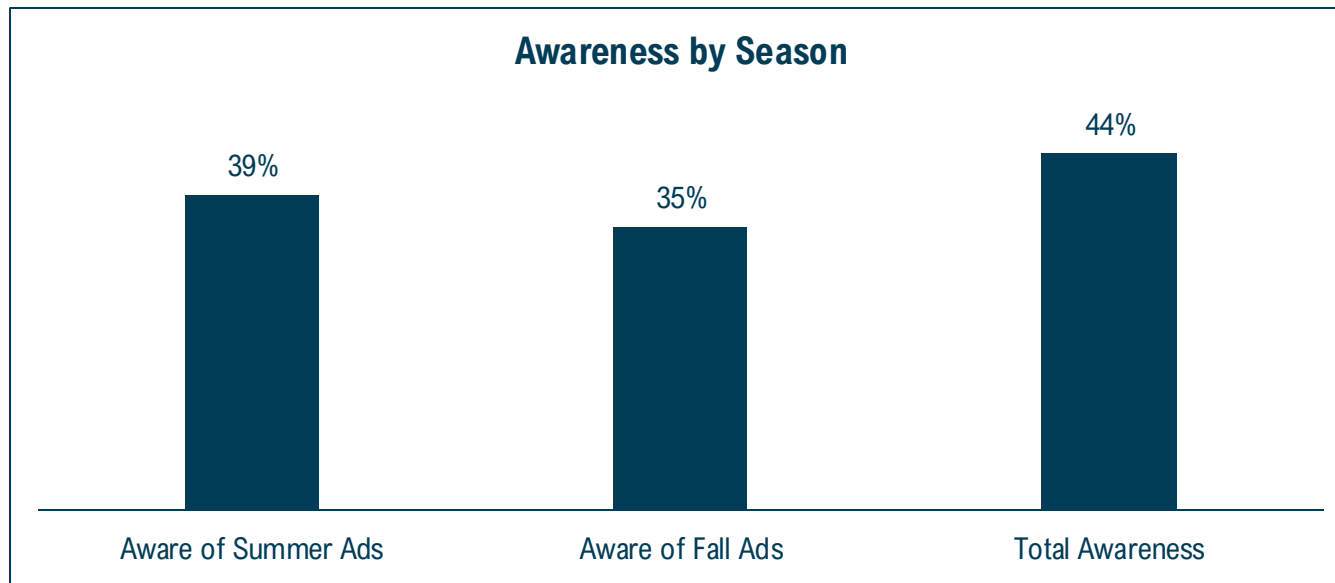
Tactical Considerations

- **Creative ratings continue to be largely excellent for the Summer and Fall campaigns and have a positive influence on brand health metrics** including Familiarity, Overall Rating, Preference, and Likelihood to Visit.
- **Nearly nine in ten Mammoth Lakes visitors say that sustainability is important to them** when choosing destinations and that it is important to practice responsible tourism while in a destination.

Summer/Fall Advertising Awareness

Summer/Fall Ad Awareness

- Recall across the Summer/Fall advertising reached 44% in 2025 (over 3 million aware households).
- With a media investment of \$678,665, this results in a cost per aware household of \$0.22. This campaign was more efficient than the average of campaigns with similar spend and scope (\$0.32).



Summer/Fall 2025	
Target HHs	6,847,608
Ad Awareness	44%
Ad-Aware HHs	3,020,014
Media Investment	\$678,665
Cost per Aware HH	\$0.22

Average Cost
per Aware HH
= \$0.32

Summer/Fall Ad Awareness – Year-over-Year

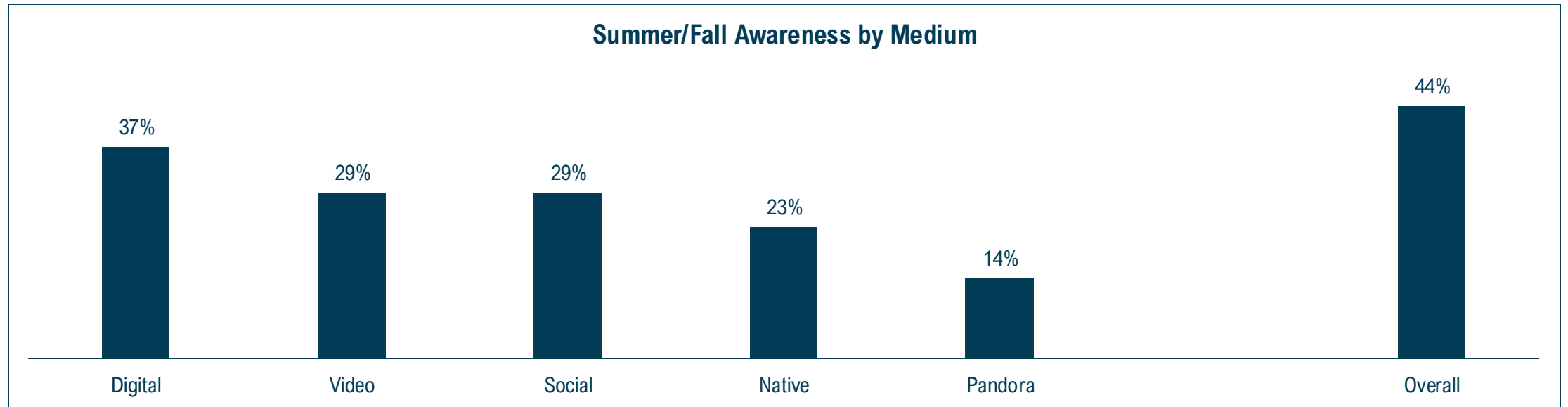
- The 2025 campaign remained efficient this year even with a larger investment – outperforming the cost per aware household benchmark for similar campaigns.

	Summer/Fall 2024	Summer/Fall 2025
Target HHs	6,847,608	6,847,608
Ad Awareness	45%	44%
Ad-Aware HHs	3,108,855	3,020,014
Media Investment	\$583,614	\$678,665
Cost per Aware HH	\$0.19	\$0.22

Average Cost
per Aware HH
= \$0.32

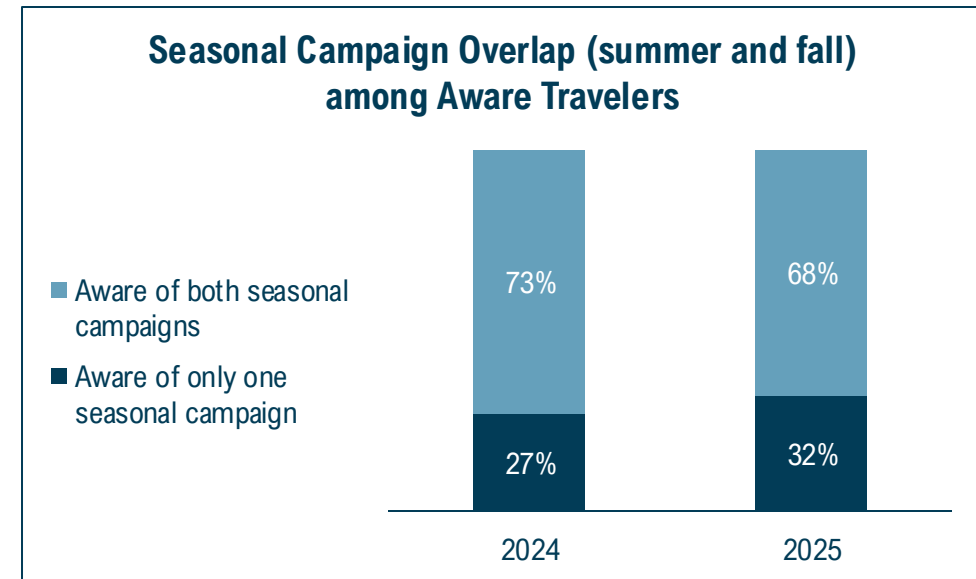
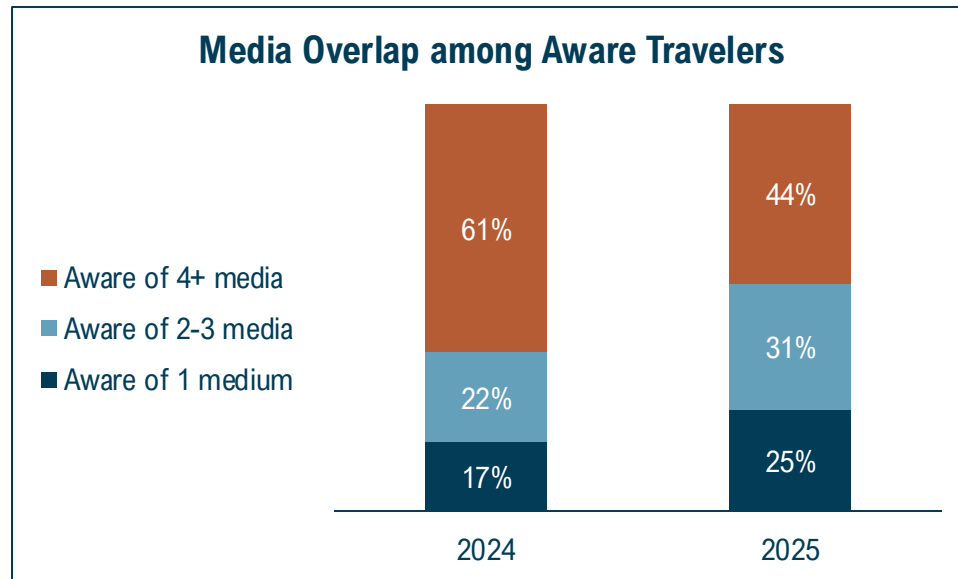
Awareness by Media Type

- The digital assets had the broadest reach this year, with nearly four in ten travelers in California and Nevada recalling an ad in the medium. Close behind were video and social, which were each recalled by 29% of the audience.



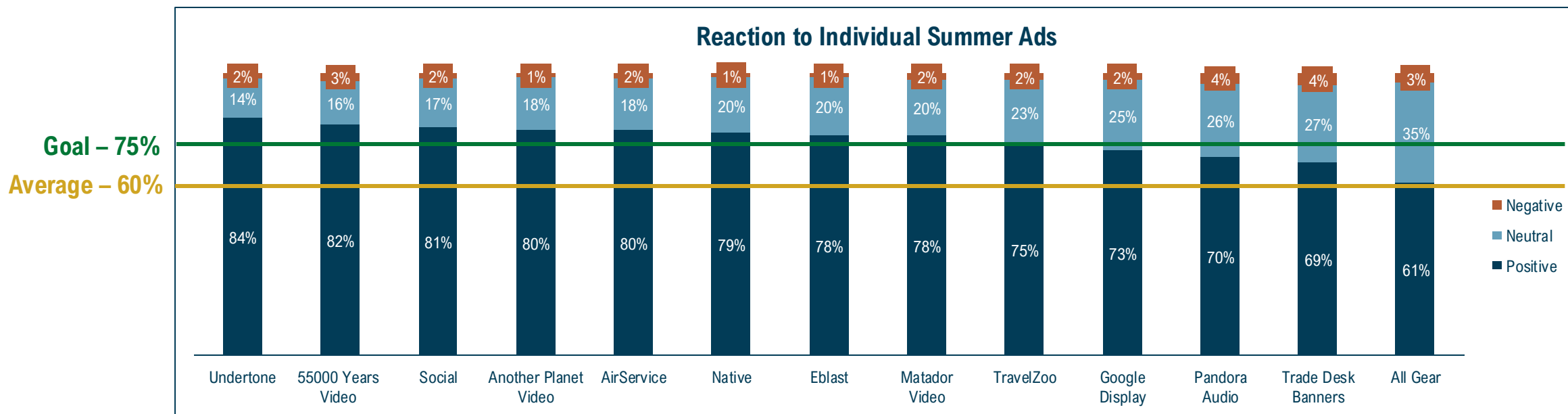
Media and Seasonal Overlap

- This year, 75% of ad-aware travelers recalled ads in more than one medium. While this campaign generated less overlap than the 2024 campaign, it is still a strong performance.
- Ad-aware travelers in the target markets were 5-pts less likely to recall an ad from both seasonal campaigns this year.
- Generating media overlap usually leads to greater advertising influence, as the various media play different roles at different stages of the decision funnel.



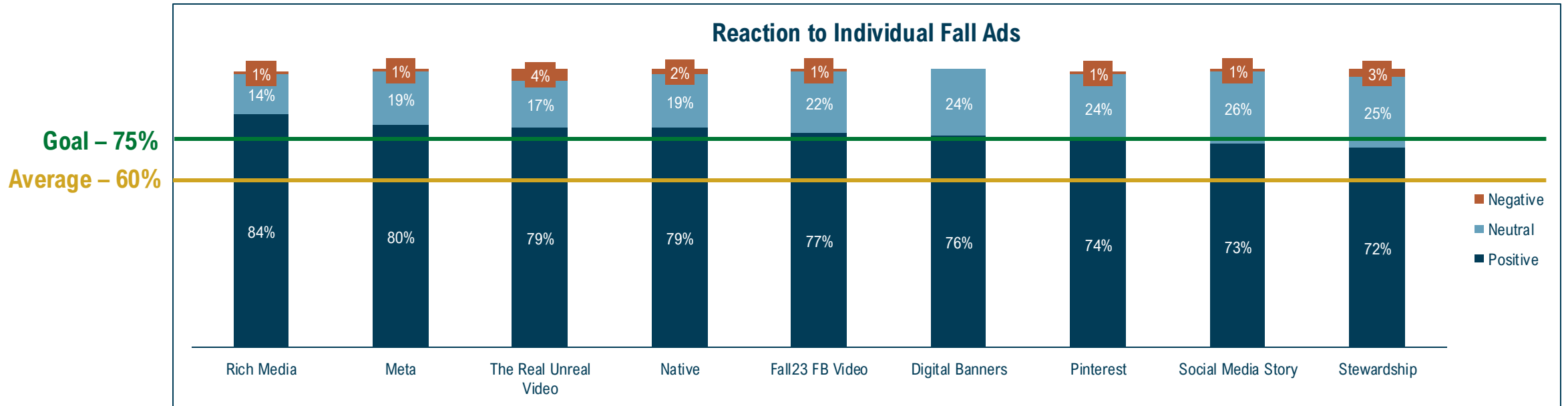
Summer/Fall Creative Evaluation

Reaction to Summer Creative



- The majority of the Summer assets tested surpassed the goal of 75% positive responses. Only Google Display, Pandora Audio, Trade Desk, and All Gear fell below the goal, though each still surpassed the average ad performance.

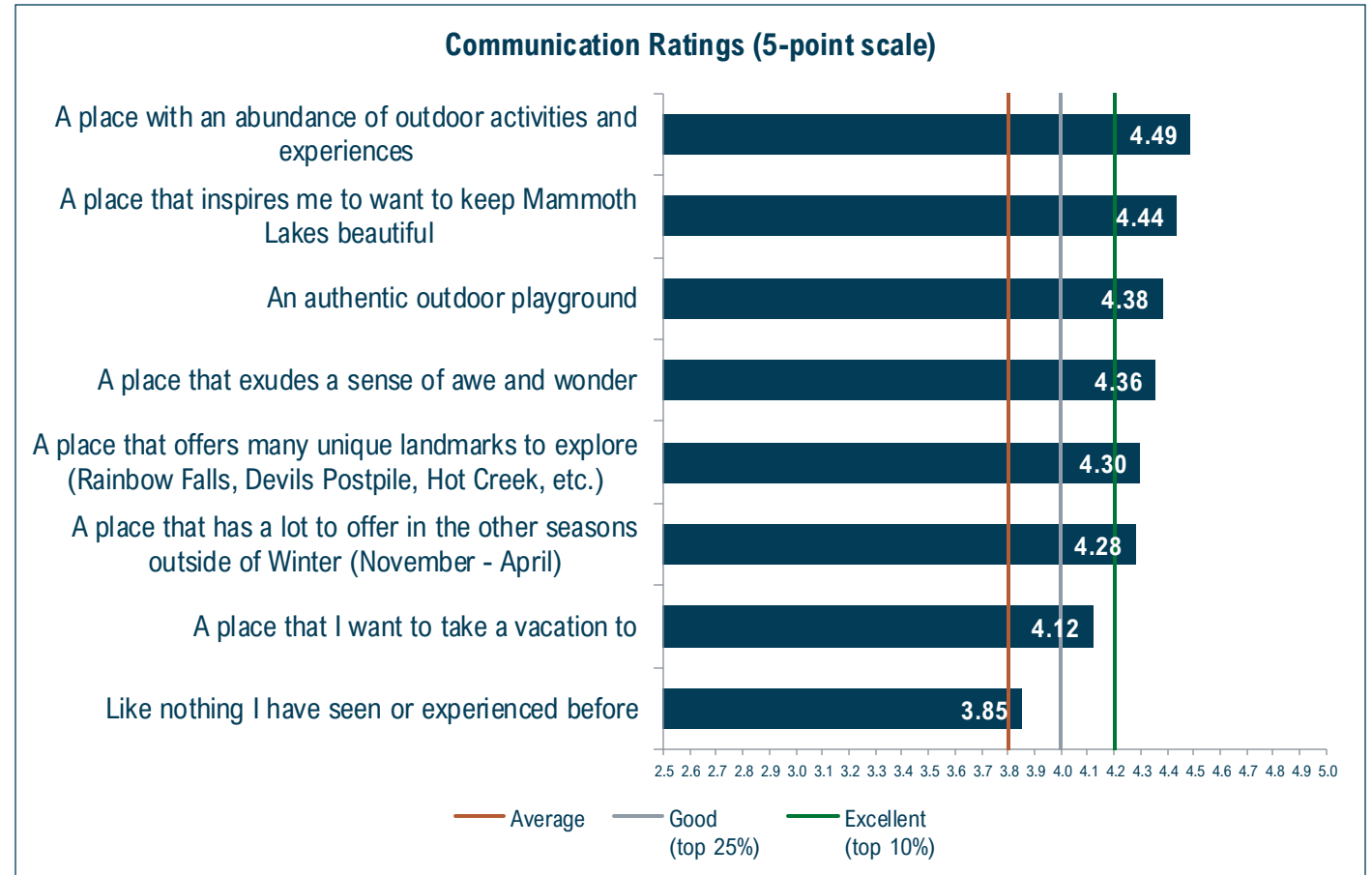
Reaction to Fall Creative



- As was the case with the Summer assets, the majority of Fall assets surpassed the 75% positivity goal. The Pinterest, social media story, and stewardship assets each fell just below the 75% goal but still surpassed the average ad performance.

Summer Creative Ratings

- The Summer ads rate in the top 10% of SMARInsights benchmarks at communicating:
 - A place with an abundance of outdoor activities and experiences
 - A place that inspires travelers to keep Mammoth Lakes beautiful
 - An authentic outdoor playground
 - Exudes a sense of awe and wonder
 - Offers many unique landmarks to explore
 - Has a lot to offer outside of Winter
- They also perform near the top 10% benchmark in terms of conveying Mammoth Lakes as a *place that I want to take a vacation to*.



Summer Creative Ratings by Generation and Market

Ad Communication Ratings Benchmarks

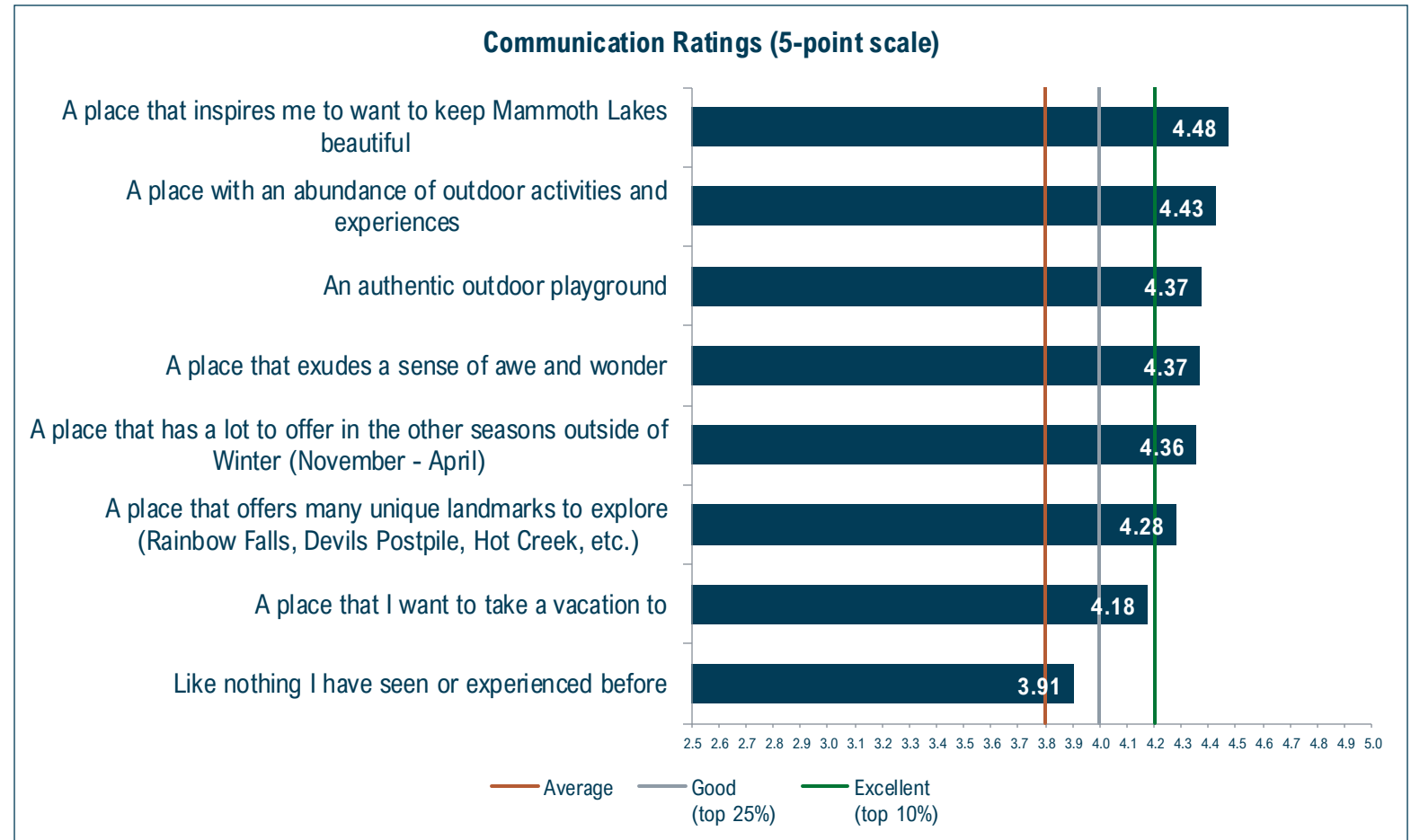
4.2 or above = Excellent (top 10%)
 4.0 – 4.19 = Good (top 25%)
 3.8 – 3.99 = Average
 Less than 3.8 = Below Average

Ad Communication Ratings	Gen Z	Millennials	Gen X	Boomers		CA	NV
A place with an abundance of outdoor activities and experiences	4.43	4.49	4.53	4.48		4.49	4.52
A place that inspires me to want to keep Mammoth Lakes beautiful	4.42	4.46	4.48	4.39		4.44	4.43
A place that offers many unique landmarks to explore (Rainbow Falls, Devils Postpile, Hot Creek, etc.)	4.28	4.28	4.33	4.31		4.30	4.31
A place that exudes a sense of awe and wonder	4.26	4.42	4.38	4.31		4.37	4.28
An authentic outdoor playground	4.24	4.37	4.45	4.39		4.39	4.32
A place that I want to take a vacation to	4.20	4.29	4.24	3.83		4.12	4.09
A place that has a lot to offer in the other seasons outside of Winter (November - April)	4.16	4.29	4.34	4.27		4.29	4.20
Like nothing I have seen or experienced before	4.00	3.94	3.92	3.66		3.86	3.80

- The ads receive strong ratings across generations and markets. Boomers rate the ads comparatively poorly for *a place that I want to take a vacation to* and *like nothing I have seen or experienced before*.
- Results are very similar for both California and Nevada.

Fall Creative Ratings

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



Fall Creative Ratings by Generation and Market

Ad Communication Ratings Benchmarks

4.2 or above = Excellent (top 10%)
 4.0 – 4.19 = Good (top 25%)
 3.8 – 3.99 = Average
 Less than 3.8 = Below Average

Ad Communication Ratings	Gen Z	Millennials	Gen X	Boomers	CA	NV
A place that inspires me to want to keep Mammoth Lakes beautiful	4.48	4.51	4.51	4.40	4.47	4.52
A place that exudes a sense of awe and wonder	4.30	4.41	4.43	4.32	4.38	4.33
A place with an abundance of outdoor activities and experiences	4.27	4.40	4.52	4.45	4.43	4.44
A place that offers many unique landmarks to explore (Rainbow Falls, Devils Postpile, Hot Creek, etc.)	4.26	4.25	4.34	4.29	4.27	4.38
A place that has a lot to offer in the other seasons outside of Winter (November - April)	4.25	4.34	4.45	4.36	4.36	4.32
A place that I want to take a vacation to	4.24	4.39	4.31	3.85	4.18	4.13
An authentic outdoor playground	4.19	4.34	4.48	4.40	4.37	4.40
Like nothing I have seen or experienced before	4.12	4.07	3.92	3.65	3.90	3.92

- The Fall creative rates similarly to the Summer ads and receives strong marks across generations and markets. Again, Boomers are more critical of the ads for showing *a place that I want to take a vacation to* and *like nothing I have seen or experienced before*.

Summer and Fall Creative Ratings Change

Ad Communication Ratings Benchmarks

4.2 or above = Excellent (top 10%)

4.0 – 4.19 = Good (top 25%)

3.8 – 3.99 = Average

Less than 3.8 = Below Average

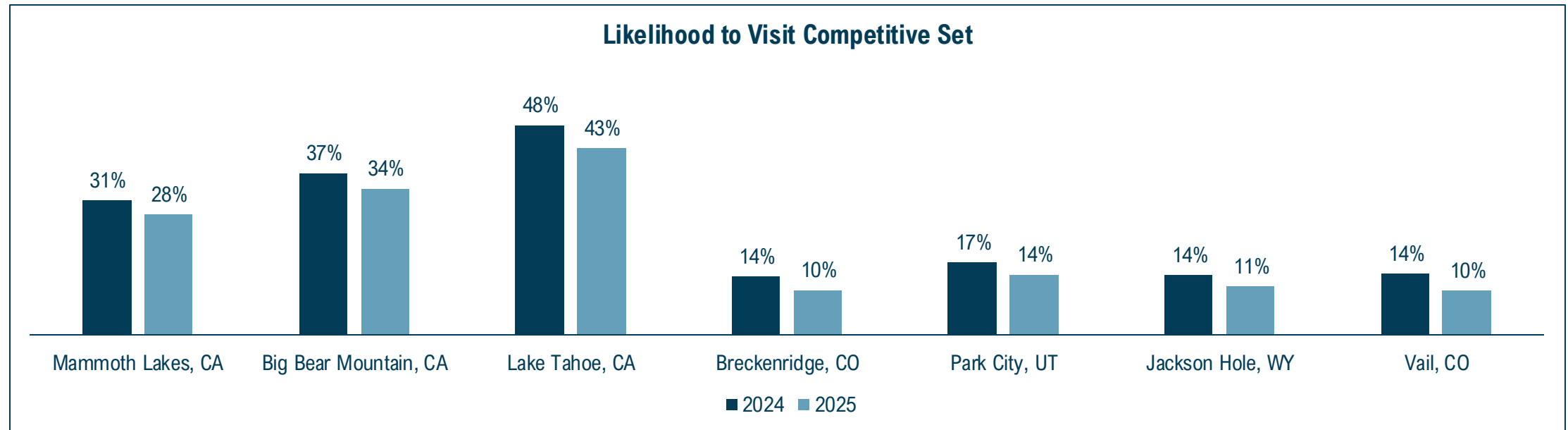
- Compared to last year, creative ratings for the Summer and Fall advertising generally remained stable.
- The only attribute with a significant decline year-over-year is *a place that I want to take a vacation to*, which fell from the excellent to good benchmark for both seasonal campaigns.
- Since much of the creative was unchanged year-over-year and the other creative ratings remained stable, the decline in this particular attribute is somewhat surprising.
- The decline appears to be driven primarily by macroeconomic pressure, not the effectiveness of the creative – which will be explored more on the next slide

Summer	2024	2025
A place with an abundance of outdoor activities and experiences	4.45	4.49
A place that inspires me to want to keep Mammoth Lakes beautiful	4.43	4.44
An authentic outdoor playground	4.40	4.38
A place that exudes a sense of awe and wonder	4.35	4.36
A place that offers many unique landmarks to explore (Rainbow Falls, Devils Postpile, Hot Creek, etc.)	4.29	4.30
A place that has a lot to offer in the other seasons outside of Winter (November - April)	4.38	4.28
A place that I want to take a vacation to	4.27	4.12
Like nothing I have seen or experienced before	3.98	3.85

Fall	2024	2025
A place that inspires me to want to keep Mammoth Lakes beautiful	4.45	4.48
A place with an abundance of outdoor activities and experiences	4.36	4.43
An authentic outdoor playground	4.36	4.37
A place that exudes a sense of awe and wonder	4.33	4.37
A place that has a lot to offer in the other seasons outside of Winter (November - April)	4.36	4.36
A place that offers many unique landmarks to explore (Rainbow Falls, Devils Postpile, Hot Creek, etc.)	4.25	4.28
A place that I want to take a vacation to	4.25	4.18
Like nothing I have seen or experienced before	3.96	3.91

Likelihood to Visit Competitive Set

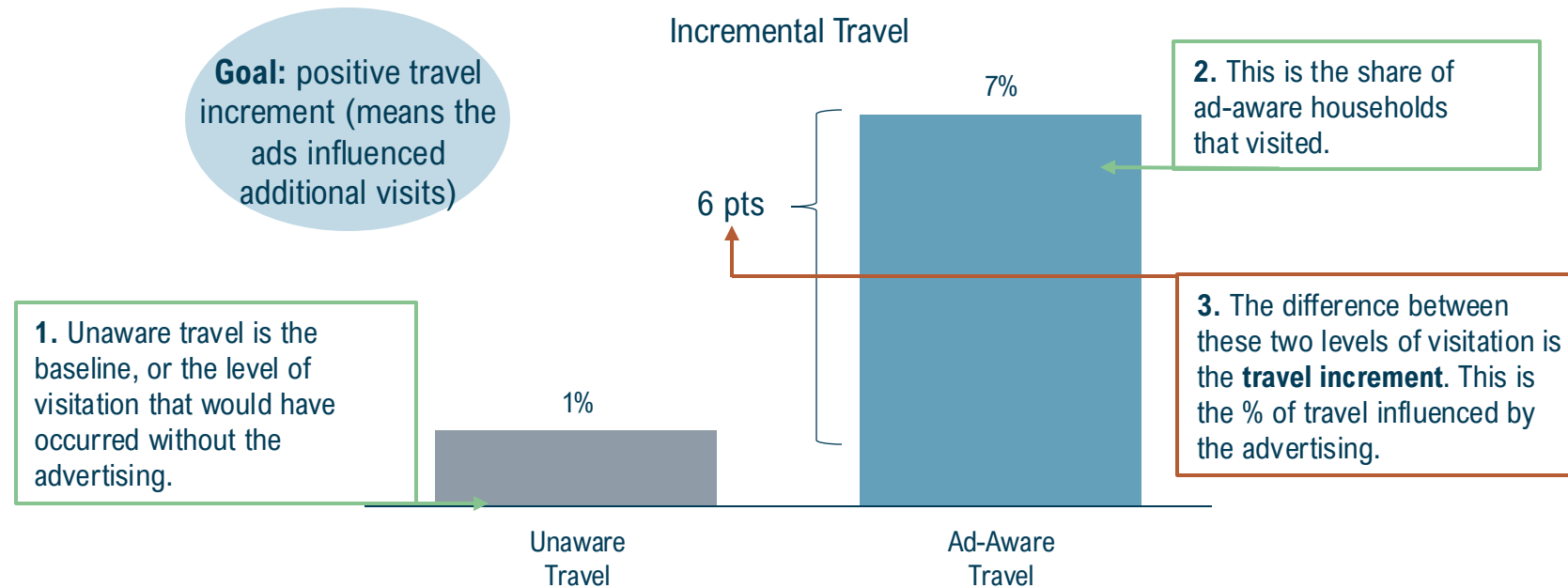
- Compared to the same time last year, travelers are less likely to visit the entire competitive set. Additionally, the most recent data available (September 2025) shows that inflation is up, which is likely posing a barrier to domestic travelers and dampening likelihood to visit and agreement that the creative shows *a place I want to take a vacation to*.



FY 24-25 ROI

Incremental Travel Review

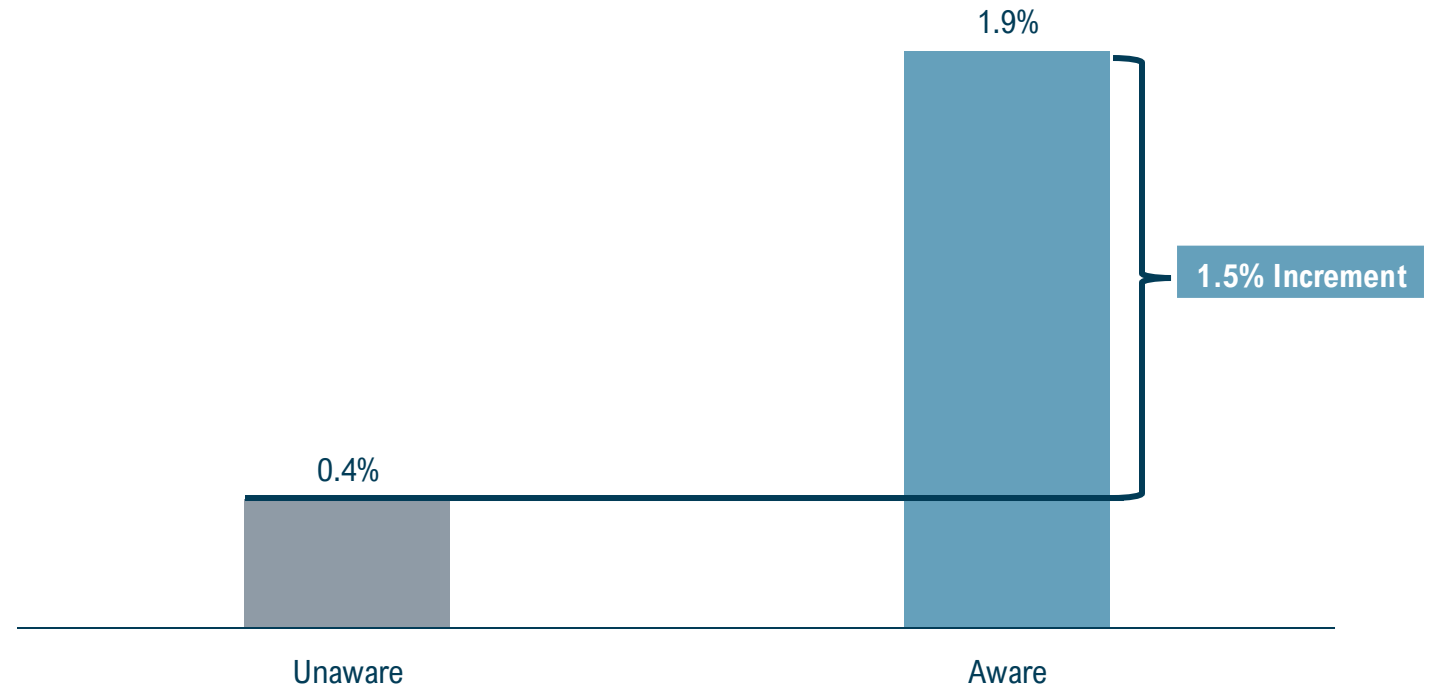
- The graphic to the right is an example of how SMARInsights measures incremental or ad-influenced travel.
- Measuring incremental travel is the key to producing a conservative measure of advertising impact. It is also the industry standard used by most destinations measuring ROI.
- A conservative visitor definition was employed in the measured incremental travel. Specifically, we do not count regular visitors, those with family or friends in the area, those attending an event, and Mammoth Lakes homeowners as potentially influenceable trips.



Summer/Fall Incremental Travel

- The Summer/Fall travel advertising produced a 1.5% 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 2025 Mammoth Lakes Travel



Summer/Fall ROI

The 2025 Summer/Fall advertising generated more than 45,000 incremental trips, resulting in nearly \$78 million in influenced visitor spending in Mammoth Lakes.

- Mammoth Lakes Tourism spent \$678,665 on these campaigns in 2025. For every dollar MLT spent, leisure visitors spent \$116 in the community.

	Summer/Fall 2025
Target HHs	6,847,608
Ad Awareness	44%
Ad-Aware HHs	3,020,014
Incremental Travel	1.5%
Ad-Influenced Trips	45,611
Avg. Trip Spending	\$1,719
Ad-Influenced Visitor Spending	\$78,388,454
Media Investment	\$678,665
ROI	\$116

Summer/Fall ROI Year-Over-Year

- Compared to last year, the 2025 Summer/Fall campaign influenced 8,000 more trips and an additional \$15 million in visitor spending.
- Additionally, the 2025 campaign generated a stronger return on investment despite a higher media budget.

	Summer/Fall 2024	Summer/Fall 2025
Ad-Influenced Trips	37,851	45,611
Avg. Trip Spending	\$1,679	\$1,719
Ad-Influenced Visitor Spending	\$63,539,645	\$78,388,454
Media Investment	\$583,614	\$678,665
ROI	\$109	\$116

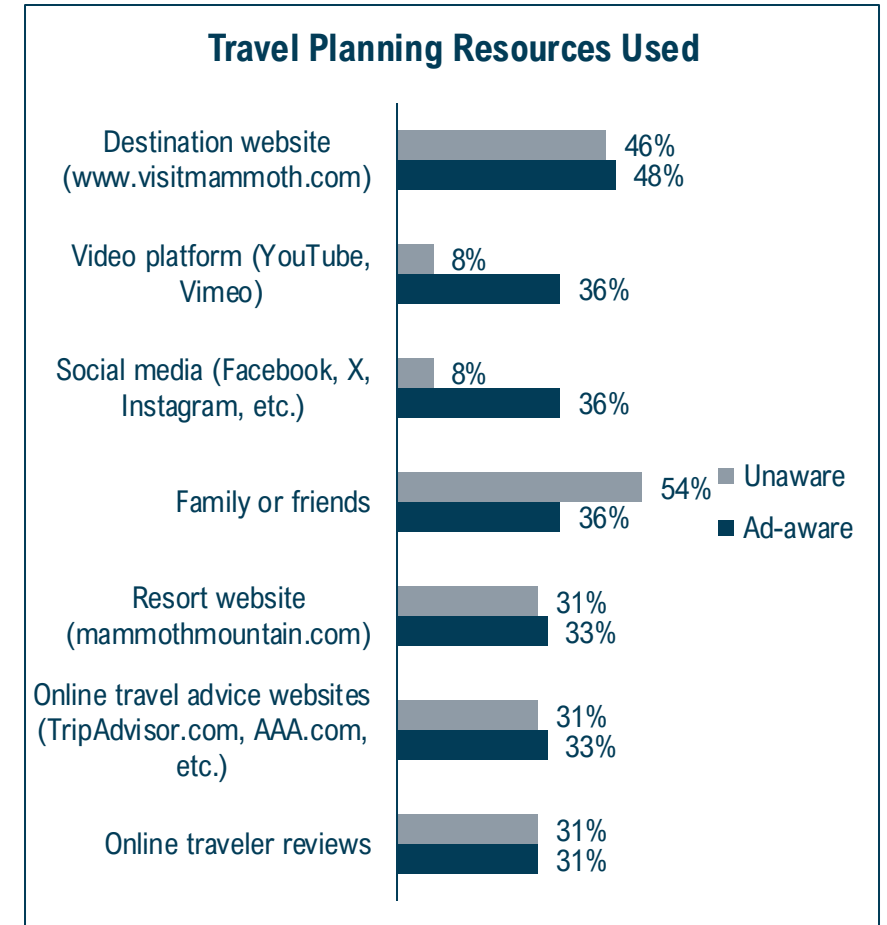
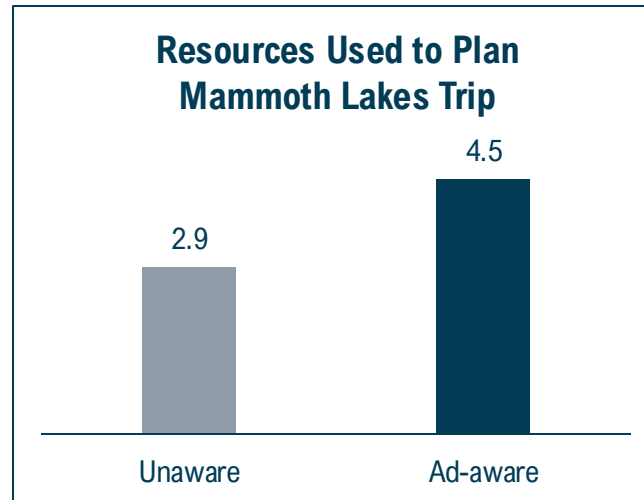
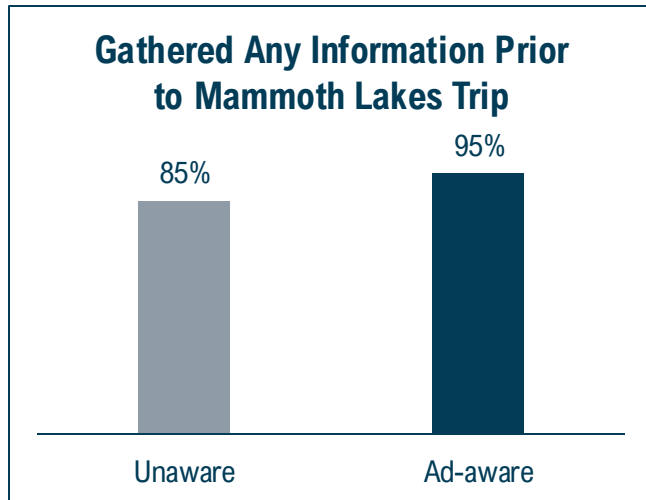
End of Year ROI

- Combined, the FY24-25 campaigns (Winter, Summer/Fall) influenced about 110,000 trips and \$208 million in visitor spending. This translates to an ROI of \$124 in visitor spending for each \$1 invested in the media.

	Winter 2024-2025	Summer/Fall 2025	Full Year
Ad-Influenced Trips	64,177	45,611	109,788
Avg. Trip Spending	\$2,027	\$1,719	\$1,899
Ad-Influenced Visitor Spending	\$130,085,438	\$78,388,454	\$208,473,892
Media Investment	\$1,000,389	\$678,665	\$1,679,054
ROI	\$130	\$116	\$124

Ad Impact on Travel Planning (Summer/Fall Trips)

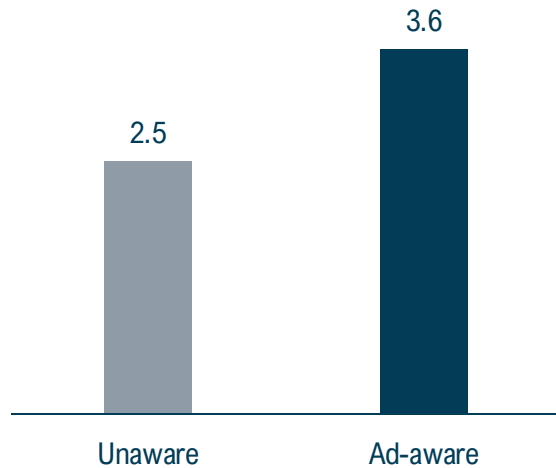
- Ad-aware travelers were more likely to gather information while planning for their Mammoth Lakes trip (and used more travel resources while doing so) than ad-unaware travelers.
- The chart to the right shows the top planning resources based on the lift in usage seen among ad-aware travelers. Unaware travelers were more likely to rely on family or friends while aware travelers were more likely to use video platforms and social media.



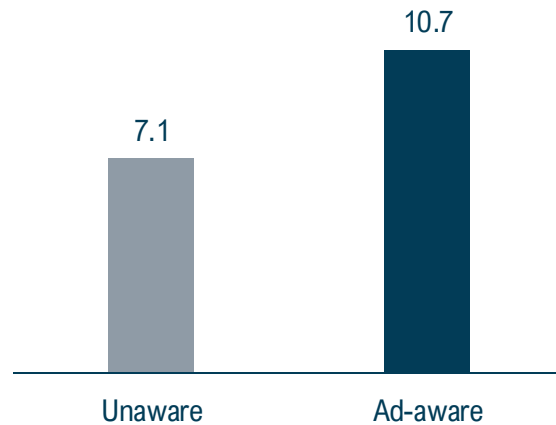
Ad Impact on Summer/Fall Trips

- 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 rate their trip as “excellent.”

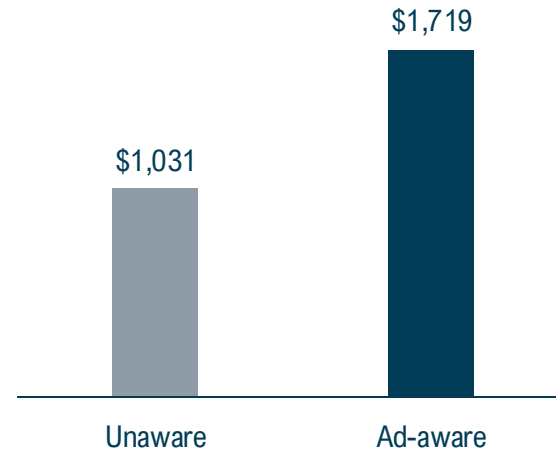
Nights on Trip



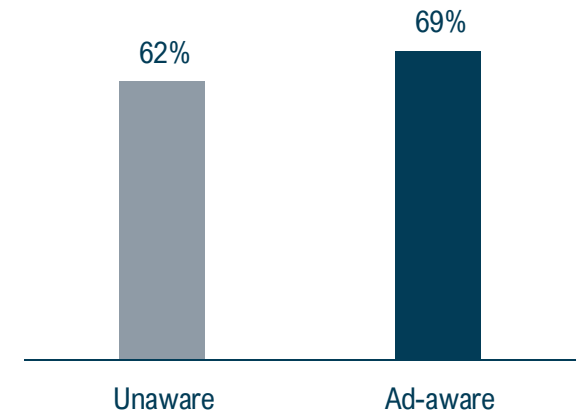
Average Number of Trip Activities



Average Trip Spending

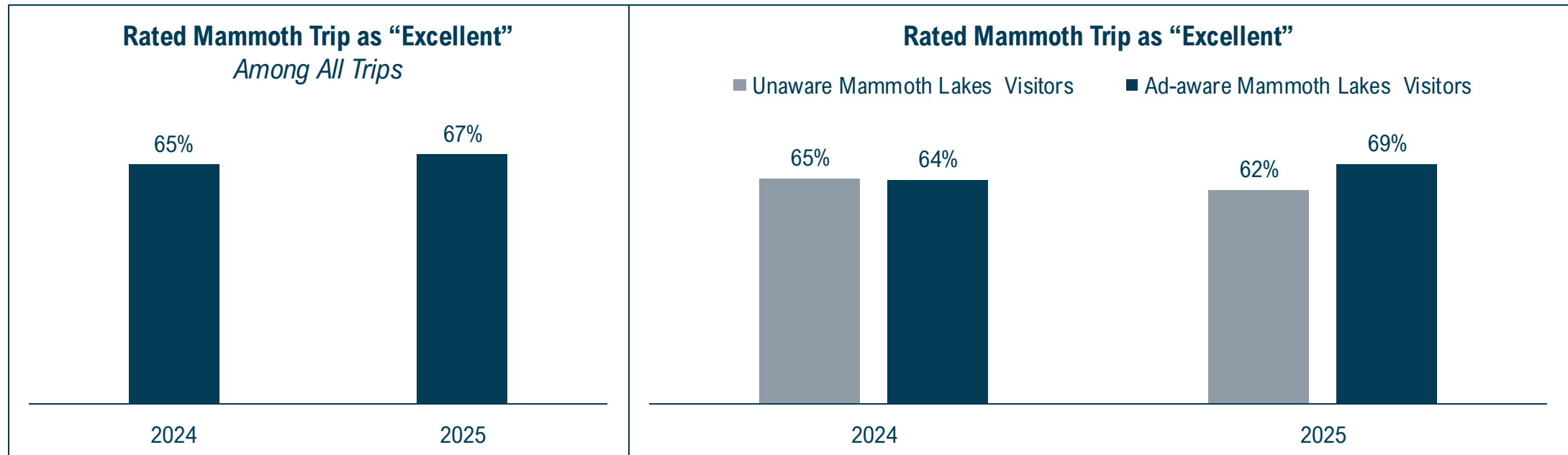


Rated Mammoth Trip as “Excellent”



Tracking Mammoth Trip Ratings

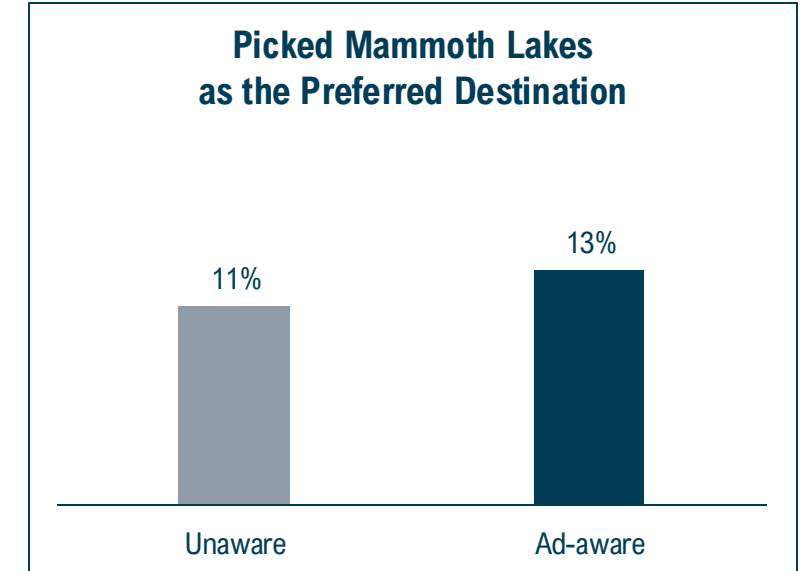
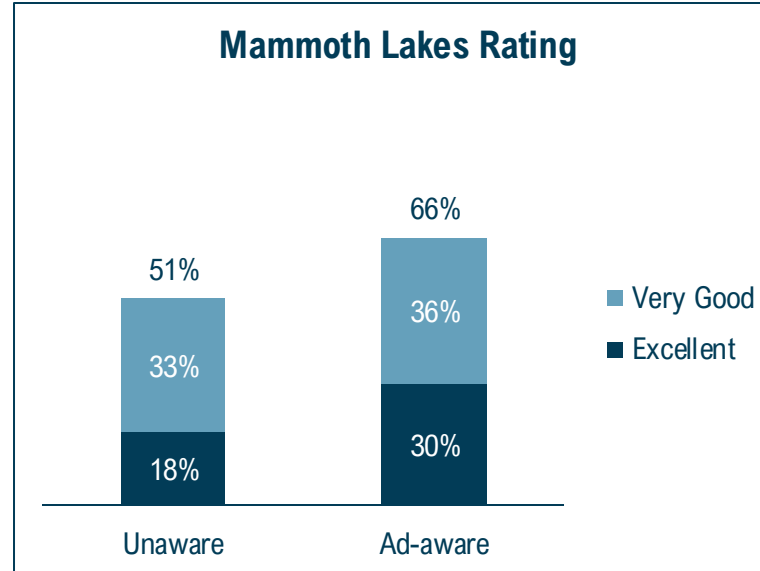
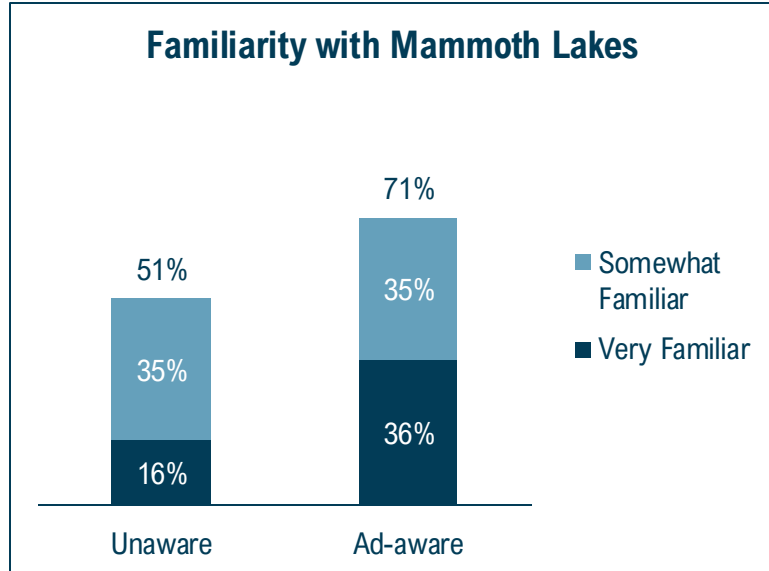
- Mammoth Lakes visitors were 2-pts more likely to rate their trip excellent this year compared to 2024, not a statistically significant change but still positive directional growth.
- The growth in positivity was driven by ad-aware visitors, who were 5-pts more likely to rate their trips excellent than last year.



Advertising Impact on Mammoth Lakes Brand Health

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%)

3.75 – 3.99 = Good (top 25%)

3.5 - 3.74 = Average

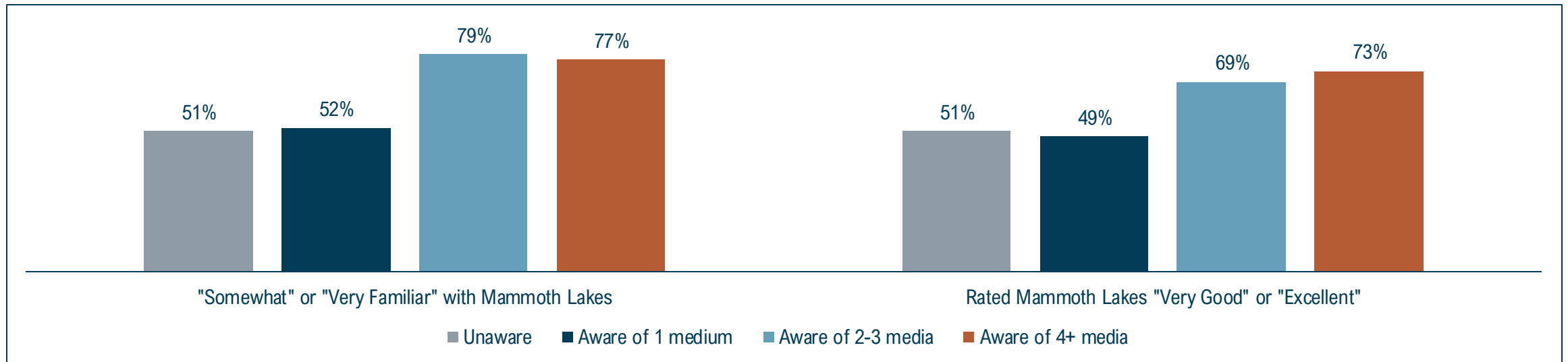
< 3.5 = Below Average

- Mammoth Lakes has a strong image among target consumers, and the advertising helps to further improve perceptions.
- Among aware travelers, all but four attributes land in the top 10% benchmark and the remaining attributes land in the top 25%.
- ***Is a destination that values sustainability and stewardship*** improves from the average benchmark among ad-unaware travelers to the top 10% benchmark among ad-aware travelers.

	Unaware	Ad-aware
Is a place you want to protect or keep beautiful	4.26	4.37
Is a destination for outdoor adventurers	4.16	4.32
Is majestic in scale and awesome in its natural beauty	4.06	4.27
Is an authentic outdoor playground	4.00	4.21
Is welcoming and friendly	3.87	4.19
Is a place that exudes a sense of awe and wonder	3.91	4.19
Offers an extraordinary sense of awe and feeling of exhilaration	3.91	4.16
Has an abundance of diverse terrain	3.88	4.11
Offers an abundance of year-round activities right outside your door	3.85	4.08
Is a destination that values sustainability and stewardship	3.73	4.08
Is inclusive to all	3.80	4.00
Is unpretentious and down-to-earth	3.70	3.94
Is accessible to all	3.66	3.92
Is like nothing you have ever seen before	3.51	3.87
Is rustic and rugged	3.81	3.78

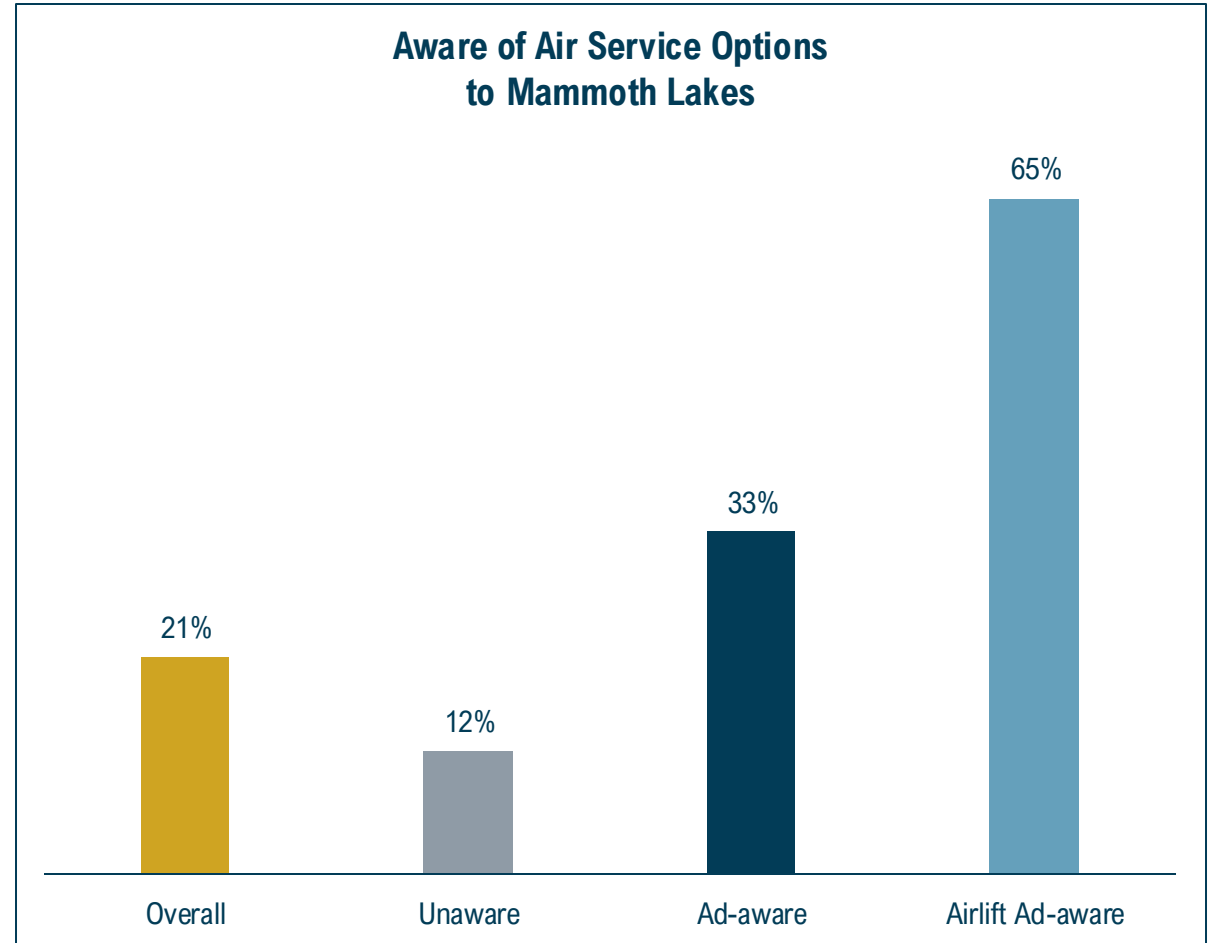
Media Overlap Impact

- Repeated exposure to messaging across various ad media helps it sink in with viewers and can enhance its impacts, as shown below. The more media types recalled, the stronger the impact on perceptions of Mammoth Lakes. The importance of overlap is emphasized by how similar unaware travelers are to those who only recall one medium.
- For example, 51% of unaware travelers said they are somewhat or very familiar with Mammoth Lakes. Travelers aware of only one media are only 1-pt more likely to be familiar with Mammoth Lakes (52%) than unaware travelers. 77% of travelers who recalled ads in four or more media formats indicated they are somewhat or very familiar, a significantly stronger performance.



Air Lift

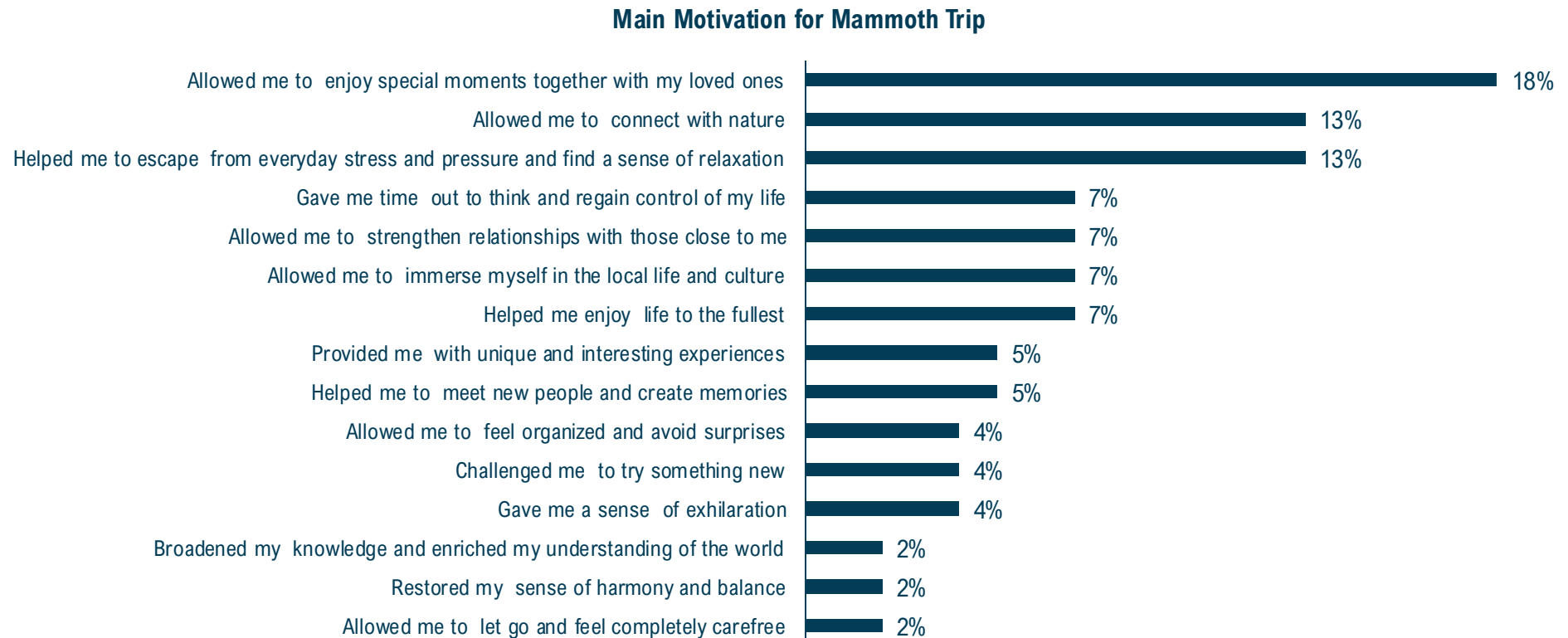
- Ad-aware travelers are 21-pts more likely to be aware of the air service options available to access Mammoth Lakes than those unaware of the advertising. Travelers who recalled the airlift-specific ad were even more likely to be aware of flight options.



Trip Specifics

Main Motivation for Mammoth Trip

- The top motivators for a Mammoth Lakes trip are enjoying special moments with loved ones, connecting with nature, and relaxation.



Activities on Trip

- Mammoth Lakes visitors are asked which activities were included during their trips and are then asked which of those activities motivated their trip. This allows for a breakout of (1) most common Mammoth Lakes trip activities, (2) which activities were the most motivating to its participants, and (3) which activities are most motivating to all Mammoth Lakes Visitors.
- For example, *Viewing mountains, lakes, etc.* was included on 73% of Mammoth Trips this year. Among visitors who said they *viewed mountains, lakes, etc.*, 78% said the activity motivated them to visit Mammoth Lakes. Multiplying these figures together tells us that 56% of ALL Mammoth Lakes trips were motivated by *Viewing mountains, lakes, etc.*
- More than half of all Mammoth trips were motivated by *viewing mountains, lakes, and other natural features*.
- Other highly motivational activities include *nature walks*, *scenic drives*, and *hiking*, each of which were motivators on more than a third of Mammoth trips this year.

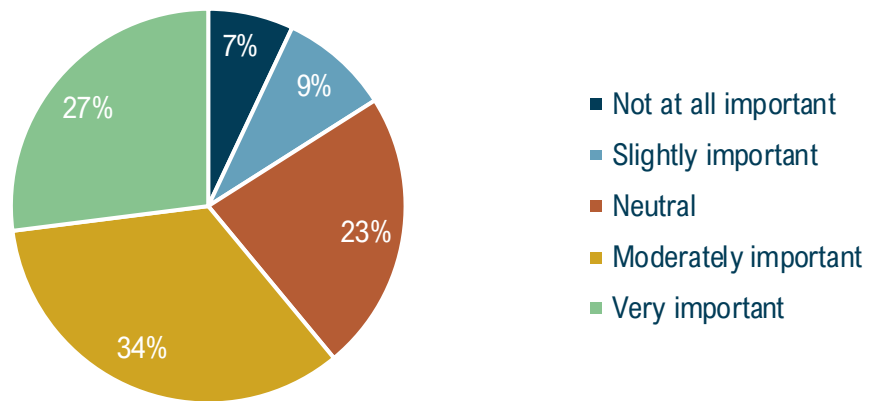
	% of Trips with Activity	% Motivated (among participants)	% of Trips Motivated by Activity
Viewing mountains, lakes, etc.	73%	78%	56%
Nature walks	75%	56%	42%
Scenic drives	69%	58%	40%
Hiking	58%	59%	35%
Wildlife watching	44%	50%	22%
Sightseeing	55%	37%	20%
Visiting geological formations unique to the area	33%	56%	18%
Arts, culture activities such as theater performances, museums	33%	56%	18%
Viewing fall colors	51%	36%	18%
Visiting a national park, forest, or monument	33%	50%	16%
Local dining and culinary experiences	47%	31%	15%
Health & wellness	33%	39%	13%
Visiting small towns and rural areas	33%	33%	11%
Fishing	25%	43%	11%
Gondola rides	24%	38%	9%
Mountain biking	29%	31%	9%
Festivals and events (music, food, arts, health & wellness, etc.)	20%	45%	9%
Attending or participating in a sporting event	22%	42%	9%
Local boutique/gift shopping	40%	23%	9%
Entertainment and nightlife	20%	45%	9%
Backpacking / mountaineering	25%	29%	7%
Visiting historical sites	22%	25%	5%
Visiting a brewery/distillery	25%	21%	5%
Road biking	16%	22%	4%
Visiting a spa	22%	17%	4%
Rock climbing	18%	10%	2%
National chain dining	11%	17%	2%
Sporting goods/outdoor retail shopping	15%	13%	2%
High altitude training	13%	0%	0%

$$\begin{array}{c} \text{\% of All Trips} \\ \text{with Activity} \end{array} \times \begin{array}{c} \text{\% of Participants} \\ \text{Motivated by Activity} \end{array} = \begin{array}{c} \text{\% of All Trips} \\ \text{Motivated by Activity} \end{array}$$

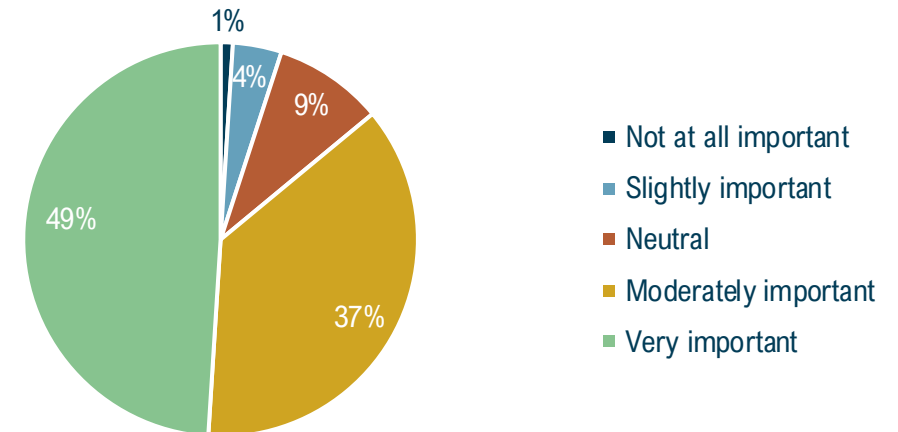
Sustainability

Sustainability Importance

How important are sustainability and stewardship efforts in choosing the destinations you visit?



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

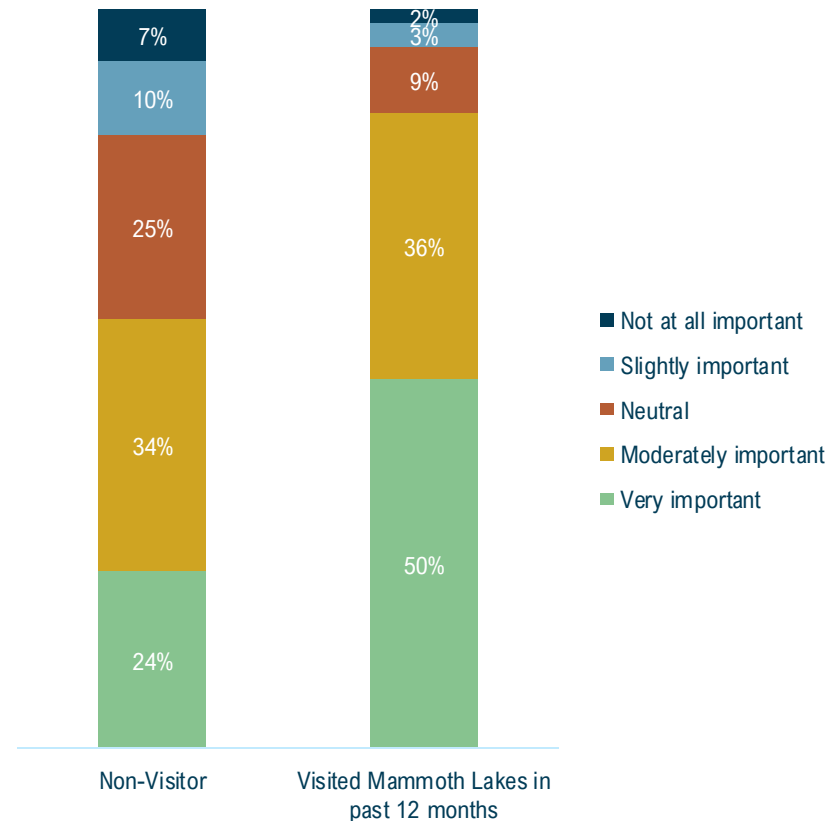


- 61% of travelers feel sustainability and stewardship efforts are important in choosing a destination to visit.
- While travelers value a destination's sustainability efforts, they place an even higher importance on their own actions. 86% consider it important to practice responsible tourism and travel behaviors while in-destination.

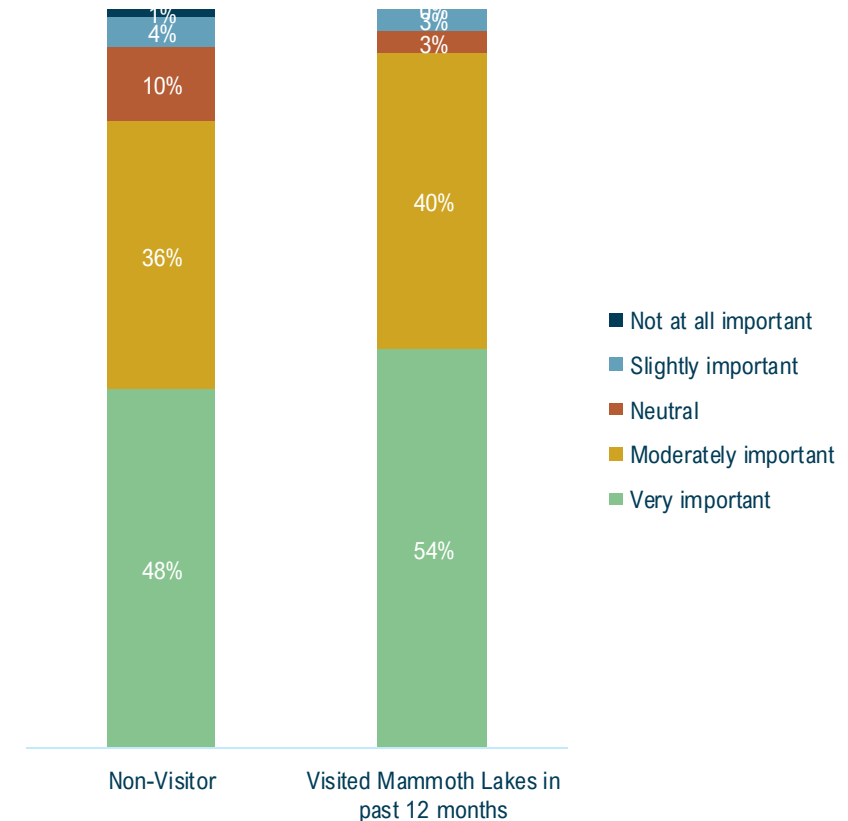
Sustainability Importance – Mammoth Visitors

- 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.

How important are sustainability and stewardship efforts in choosing the destinations you visit?



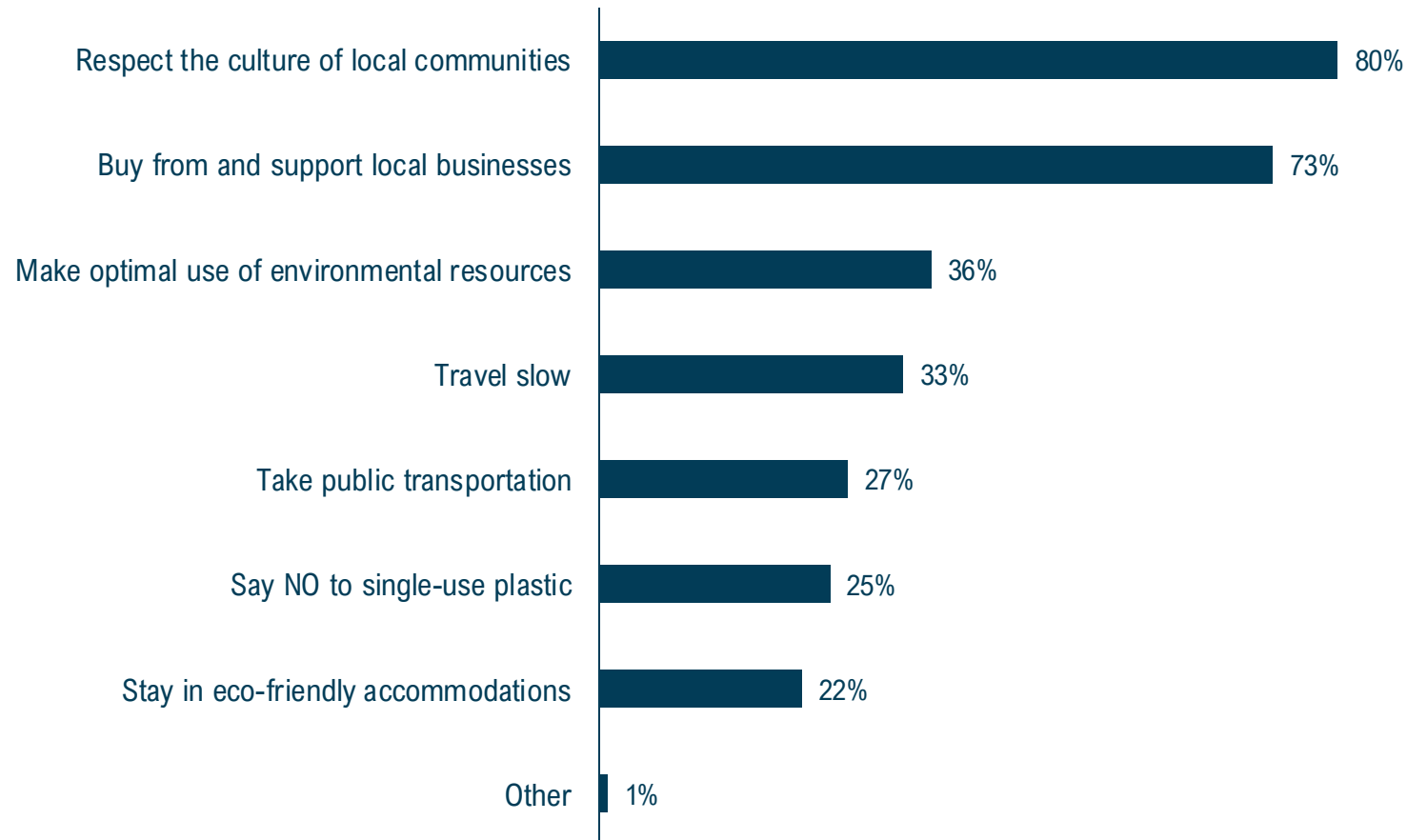
How important is it to you to practice responsible tourism/travel practices while in a destination?



Sustainability Actions Taken While Visiting a Destination

- When asked about their actions while visiting a destination, the majority were geared towards respecting the local community and supporting local restaurants and businesses.
- About a quarter of respondents said they take public transportation and say no to single-use plastics. While sustainability is important, it is a niche group taking these specific actions.

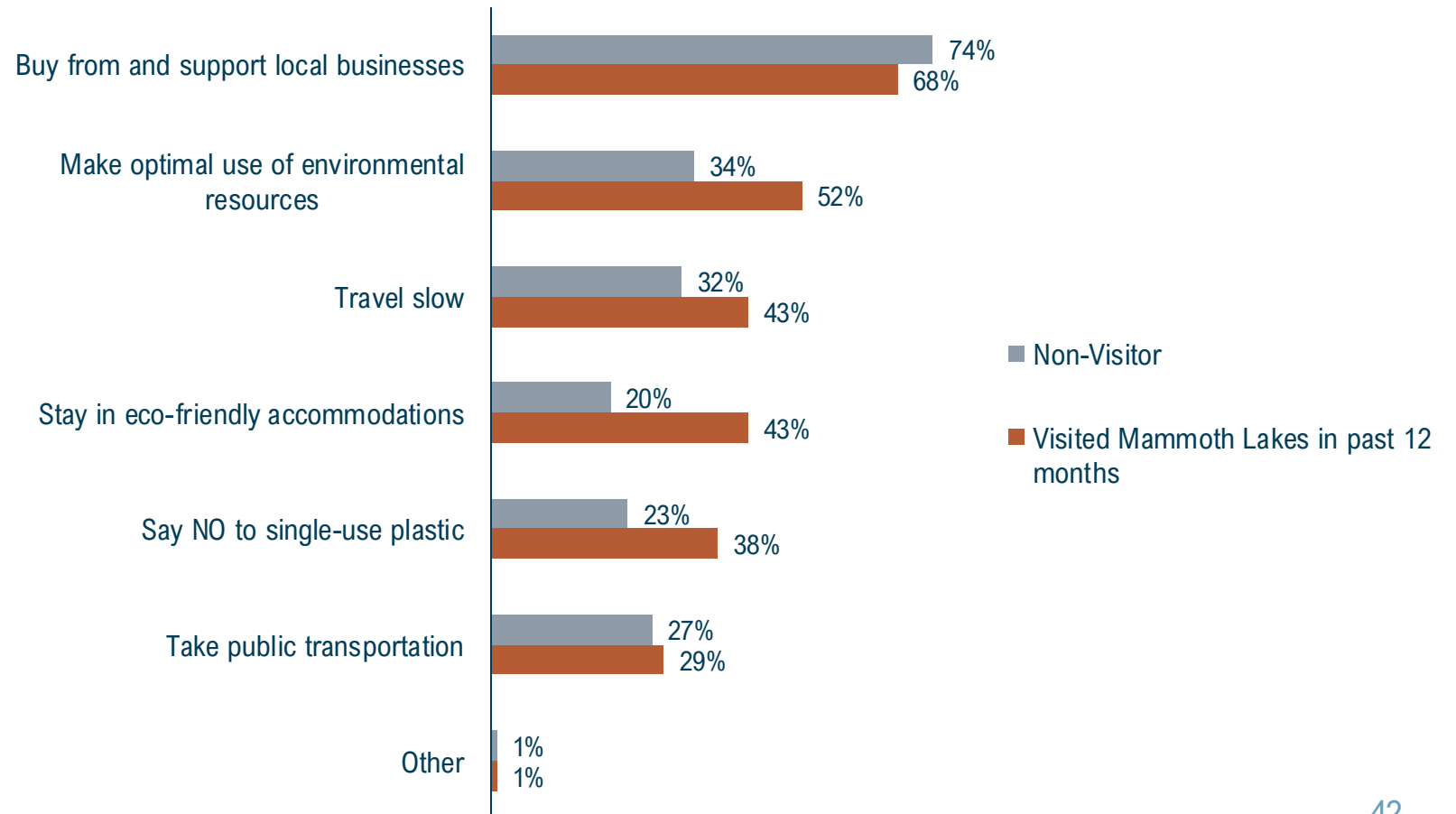
Actions Taken While Visiting Destinations



Sustainability Actions Taken While Visiting a Destination

- As noted earlier, Mammoth Lakes visitors are more likely than general travelers to say that sustainability is important to them when choosing destinations and that it is important to practice responsible tourism while in a destination.
- As such, it is unsurprising that Mammoth Lakes visitors are more likely than non-visitors to make optimal use of environmental resources, travel slow, stay in eco-friendly accommodations, say no to single-use plastic, and take public transportation.

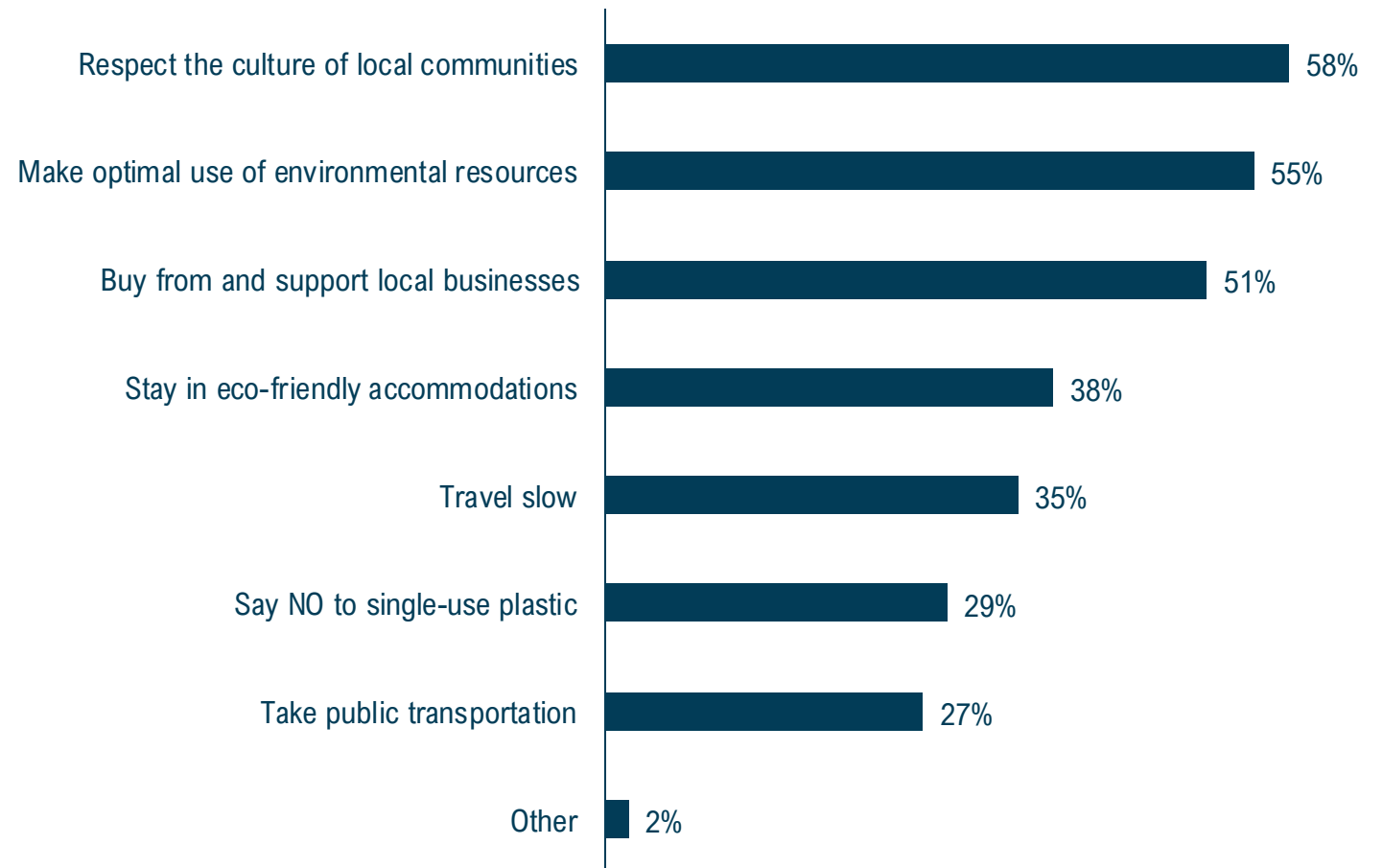
Actions Taken While Visiting Destinations



Sustainability Actions Taken While Visiting Mammoth

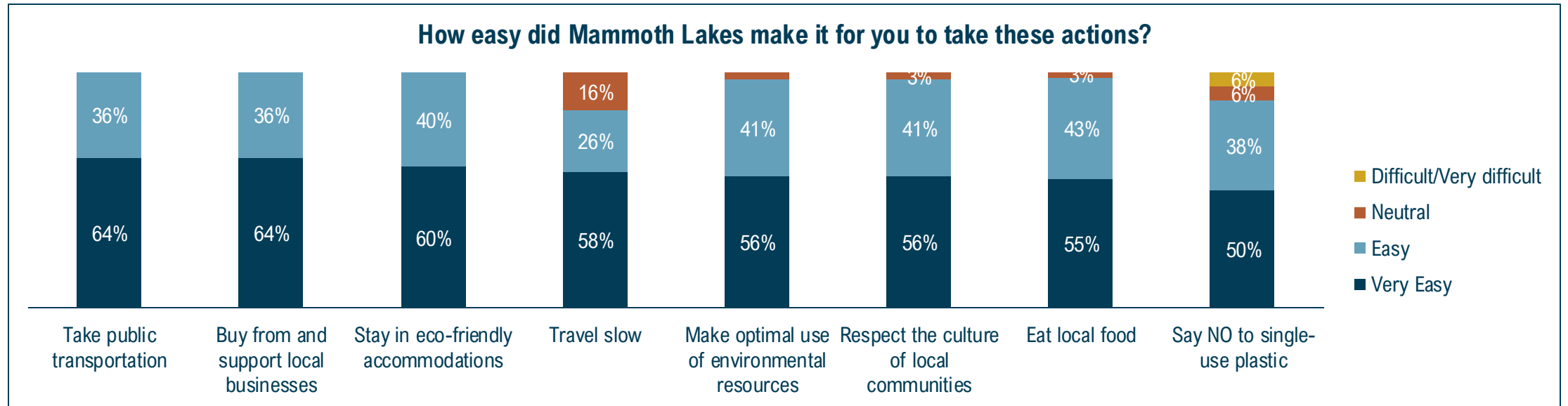
- More than half of Mammoth Lakes visitors said that they respected the culture of local communities, made optimal use of environmental resources, and bought from local businesses.
- More than a third of visitors stayed in eco-friendly accommodations and traveled slow.
- Lastly, a quarter of visitors said no to single-use plastics and took public transportation.

Actions Taken While Visiting Mammoth Lakes



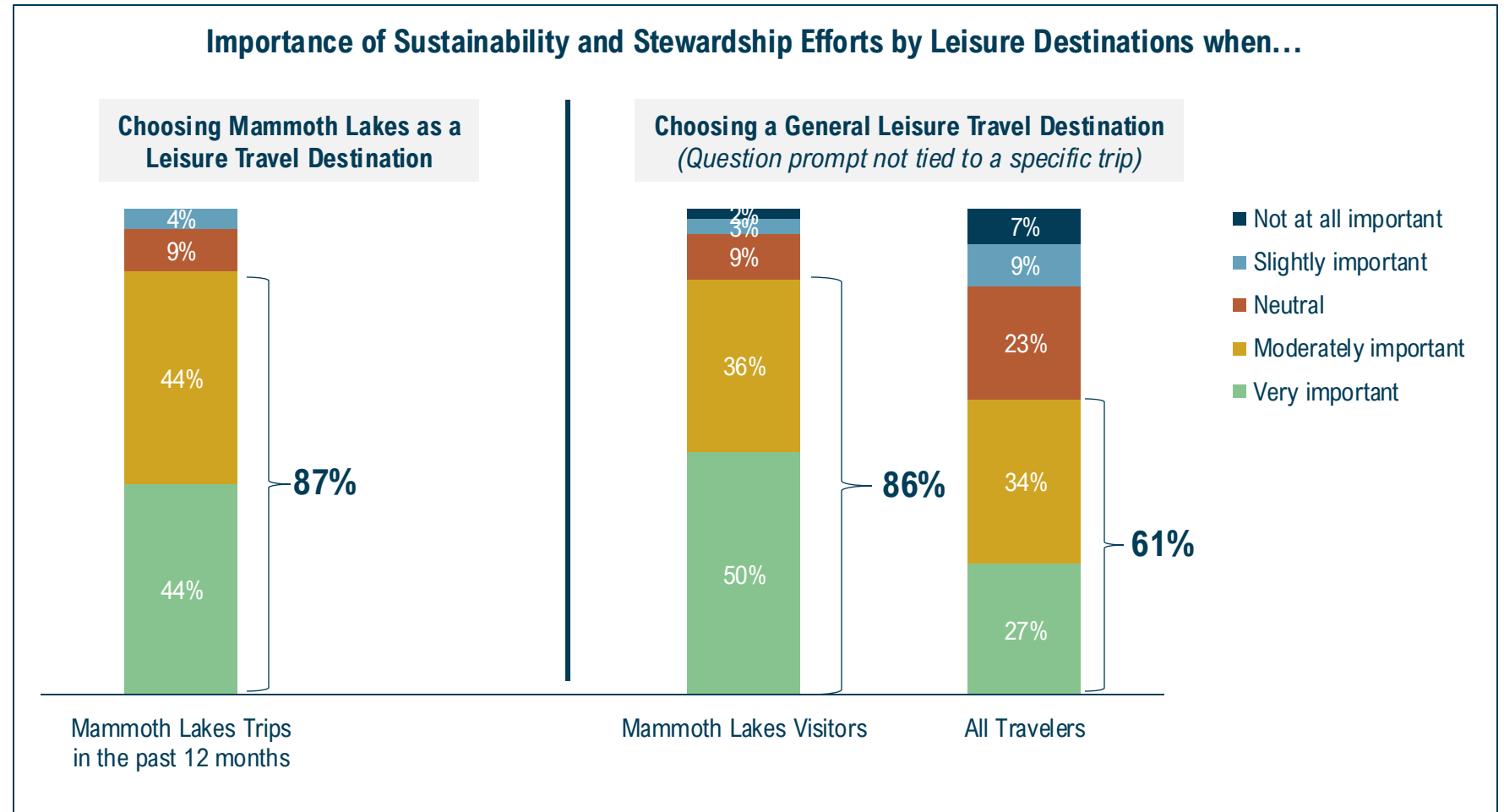
Sustainability Actions Taken While Visiting Mammoth

- Visitors who took sustainability actions were asked how easy it was to do so. Taking public transportation, supporting local businesses, and staying in eco-friendly accommodations were rated the easiest sustainable actions to take while in Mammoth.
- The only action that visitors said was difficult or very difficult was saying no to single-use plastics.



Sustainability Importance – Mammoth and Other Trips

- This year, nearly nine in ten Mammoth Lakes visitors say that sustainability was important to them when choosing Mammoth Lakes as destination.
- Mammoth Lakes Visitors value sustainability whenever they travel. They are 25-pts more likely to say that sustainability and stewardship efforts are *moderately or very important* when choosing a general leisure destination than the average traveler.



Appendix: Questionnaire

Questionnaire

Mammoth Lakes, California (Shipyard)
Ad Effectiveness SUMMER & FALL EOY 2025

Quotas
1000
California and Nevada

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 or Hulu		
I engage in outdoor activities like hiking, biking, fishing, backpacking, nature walks, etc.		TERMINATE IF NO TO BOTH OF THESE
Have taken outdoor, nature-focused vacations in the spring, summer or fall.		AT END OF SCREENER
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 known as Twitter), Instagram or TikTok		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		

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?

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[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 mountain and/or lake vacation?

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 mountain and/or lake vacation?

[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 May 2025?

ROTATE
INSERT COMP SET SELECTED IN Q4
None of these

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

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

ASK Q5A – Q5C IF AT LEAST SOMEWHAT LIKELY TO VISIT MAMMOTH LAKES AT Q5.

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Q5a. When are you likely to visit Mammoth Lakes, CA in the next year? Please select all that apply.

- Winter (November 2025 – April 2026)
Spring/Summer (May 2026 – August 2026)
Fall (September 2026 – October 2026)

Q5b. Which season do you most associate with Mammoth Lakes travel?

- Winter (November – April)
Spring/Summer (May – August)
Fall (September – October)

Q5c. How many times per year do you typically visit Mammoth Lakes for leisure? _____

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
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Questionnaire

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 support local businesses
- Travel slow
- Say NO to single-use plastic
- Eat local food
- Other, specify _____
- None of these

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 you 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					

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Is like nothing you have ever seen before					
Is welcoming and friendly					
Is inclusive to all					
Is accessible to all					
Is a place that exudes a sense of awe and wonder					

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 MAY 2025 THROUGH NOVEMBER 2025] 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 had you visited Mammoth Lakes before your visit in [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 top three motivations for this trip, with "1" being the top motivation.

[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
Allowed me to strengthen relationships with those close to me
Restored my sense of harmony and balance

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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 and 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? ____ [ASK IF Q5>1]

T6A. How many people in your travel party were children under the age of 18?

[ASK OF ENTIRE BASE]

T7A_1. Are you aware of air service options to access the Mammoth Lakes? Yes/No

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

- Flew into Mammoth Yosemite Airport (MMH)
- Flew into Bishop Airport (BIH)
- Flew into another airport and drove to Mammoth Lakes
- Drove the whole way

ASK T7A IF FLEW INTO ANOTHER AIRPORT AT T7.

T7a. Where did you fly into?

- Los Angeles
- Las Vegas
- Reno
- Other, please specify _____

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

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Questionnaire

[IF T5=0, SKIP Q9 SERIES]

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

- With family and/or friends
- In a property you 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)
- 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 within Mammoth Lakes (such as taxi, Uber, airport shuttle, or rental car)
- 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]

Viewing & Enjoying Natural Scenery
Scenic drives
Gondola rides
Visiting geological formations unique to the area
Sightseeing
Viewing mountains, lakes, etc.
Viewing fall colors
Other, specify _____
Outdoor Activities
Hiking

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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 _____
Special Events
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 _____
Other Activities
Visiting small towns and rural areas
Visiting historical sites
Visiting a brewery/distillery
Visiting a spa
Local dining and culinary experiences
National chain dining
Local boutique/gift shopping
Sporting goods/outdoor retail 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
------	------	------	-----------	-----------

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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	

T15. How much do you agree or disagree that Mammoth Lakes was an inclusive and welcoming place?

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree

T16. While visiting Mammoth Lakes, did 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 support local businesses
- Travel slow
- Say NO to single-use plastic
- Eat local food
- Other, specify _____
- None of these

T17. How easy did Mammoth Lakes make it for you to take these actions?

	Very difficult	Difficult	Neutral	Easy	Very easy
SHOW THOSE SELECTED AT T16					

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Questionnaire

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
- Video platform (YouTube, Vimeo)
- Email newsletter
- Local influencer or social ambassador
- Other, 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 before 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 (specify) _____
No, I was not familiar with Mammoth Lakes prior to my recent trip

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AD AWARENESS

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions. [ROTATE ADS WITHIN EACH MEDIUM]

ALWAYS SHOW SPRING/SUMMER BRAND ADS FIRST – THEN SPRING/SUMMER AIR SERVICE ADS – THEN FALL ADS. SHOW ALL AIR SERVICE ADS ON THE SAME SCREEN AND ASK AWARENESS OF AND THEN REACTION TO THEM.

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

- 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? _____

VIDEO - SPRING/SUMMER



<https://vimeo.com/1133601790> <https://vimeo.com/1133601661> <https://vimeo.com/1133601442>

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SOCIAL DISPLAY - SPRING/SUMMER

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Spring Summer FY25\Social Single Image



RICH MEDIA - SPRING/SUMMER

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Spring Summer FY25\Rich Media\USE



NATIVE DISPLAY - SPRING/SUMMER

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Spring Summer FY25\Native

TradeDesk



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Questionnaire

TravelZoo



AirService



GoogleDisplay



DIGITAL BANNERS – SUMMER/SPRING

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Spring Summer FY25\BannerUSE TradeDesk



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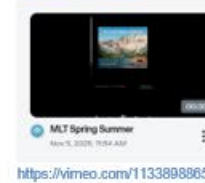
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AllGear



DIGITAL AUDIO – SUMMER/SPRING

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Spring Summer FY25\Audio



<https://vimeo.com/1133898865>

EBLAST

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Spring Summer FY25\E-Blasts



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Questionnaire

ASK AFTER ALL SPRING SUMMER ADS ARE SHOWN

GRID. When you think about all the advertising you just saw as a whole, how much do you agree that they communicate that Mammoth Lakes is...?

ROTATE	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
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					
A place with an abundance of outdoor activities and experiences					
A place that offers many unique landmarks to explore (Rainbow Falls, Devils Post Pile, Hot Creek, etc.)					
A place that has a lot to offer in the other seasons outside of Winter (November – April)					

FALL ADS

Now, please review another set of advertising and answer the questions.

[ASK AFTER EACH AD/GROUP OF ADS]

Ad1. 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? _____

VIDEO - FALL



<https://vimeo.com/1133605195>

<https://vimeo.com/1133605077>

RICH MEDIA – FALL

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Fall FY26\Rich Media



Questionnaire

SOCIAL DISPLAY – FALL

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Fall FY26 Social Single Image



I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Fall FY26 Pins



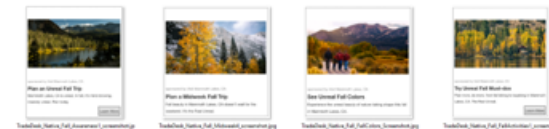
I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Fall FY26 Story



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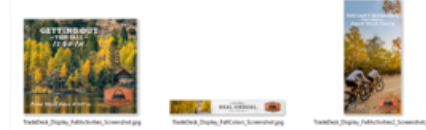
NATIVE DISPLAY – FALL

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Fall FY26 Native



DIGITAL BANNERS – FALL

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\OneDrive_2025-10-30\Ad Tracker\Fall FY26 Banners



INMARKET STEWARDSHIP

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025\More Ads\In Market Stewardship\In Market Stewardship\USE



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ASK AFTER ALL FALL ADS HAVE BEEN SHOWN

When you think of this second set of ads you just saw as a whole, how much do you agree that they communicate that Mammoth Lakes is...?

ROTATE	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
A place that inspires me to want to keep Mammoth Lakes beautiful					
A place that exudes a sense of awe and wonder					
A place with an abundance of outdoor activities and experiences					
A place that offers many unique landmarks to explore (Rainbow Falls, Devils Post Pile, Hot Creek, etc.)					
A place that has a lot to offer in the other seasons outside of Winter (November – April)					
An authentic outdoor playground					
Like nothing I have seen or experienced before					
A place that I want to take a vacation to					

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Questionnaire

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

I:\Ads Master\Mammoth Lakes\Summer Fall EOY2025



Mammoth Travel Guide 2025.jpg

[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

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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
X (formerly Twitter)
TikTok
YouTube
Pinterest
Other



TikTok tile.jpeg



Twitter tile.jpg



Instagram tile.JPG



Facebook tile.jpg

Do not follow Visit Mammoth on any social channels

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

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\$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 but less than \$300,000
\$300,000 but less than \$400,000
\$400,000 but less than \$500,000
\$500,000+

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

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 (Specify _____)

gender. Do you identify as...

Male
Female
Non-binary
Prefer not to answer

Identity. Do you identify as LGBTQIA+?

Yes
No
Prefer not to answer

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