



MAMMOTH LAKES TOURISM WINTER 2018-19

Advertising Effectiveness Research

Mering Carson



Background & Objectives

- Mammoth Lakes Tourism (MLT) conducts research to track the impact of its seasonal marketing investments on visitation to the destination and visitor spending. While these are not the only metrics that show the advertising is working, they are the ultimate goal of the advertising, and are what generates the transient occupancy taxes (TOT) that return to the community and fund further destination marketing.
- This wave of research measured the following for the Fiscal Year 2018/19 Winter campaign:
 - Awareness, favorability, perceptions of the destination, and trip motivators in existing CA + NV markets
 - First-year performance in the NEW Denver market
- As in prior research, respondents were screened to be at least 18 years old, travelers, and travel decision makers for their households. Travelers were also screened to be outdoor travelers, which represents 71% of the traveling populations in the markets surveyed. This population is used as the base in this reporting.
- Data was collected from May 31-June 4, 2019. The trip data that was gathered in this wave of research will be compiled along with summer/fall 2018 and subsequent ROI research, for calculation of a Fiscal Year 2018-19 economic impact and ROI for the No Small Adventure campaign.

Surveys per Market	Winter 2018-19
Los Angeles	200
San Diego	100
San Francisco	201
Other California	100
Nevada	100
NEW: Denver	200
Total	901

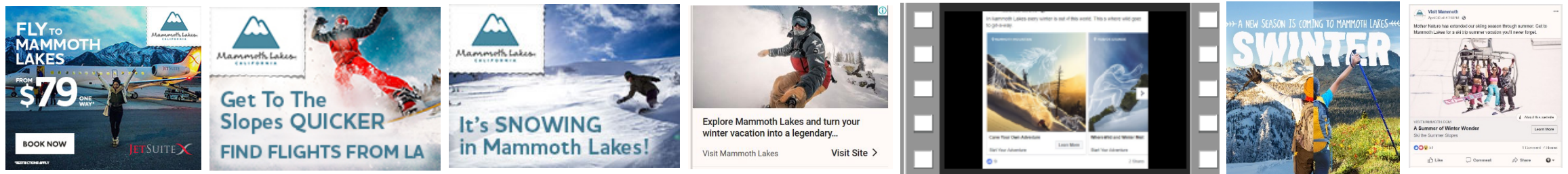
No Small Adventure Advertising Campaign

- The No Small Adventure campaign is a multi-year, multi-season brand campaign. The look of the seasonal ads is consistent with creative that has run for several years. The research looks at reach and impact of individual seasonal executions, within the context of the larger campaign.
- The research tested Winter 2018-19 seasonal ads:
 - 360 Degrees of Adventure video and social assets
 - General Winter seasonal assets
 - Snow Blitz social assets
 - Winter air service assets
 - Swinter (Summer meets Winter) assets
- The bulk of winter ads ran October 2018 through March 2019. Winter spending totaled \$863,733. \$64,938 was spent on paid advertising in Denver for the first time in campaign history.
- Data on trips to Mammoth Lakes using air travel is being collected throughout the year. Impact of the ads on trips to Mammoth Lakes will be evaluated in the fiscal year-end ROI report.

Campaign Spending	2016-17	2017-18	2018-19
Summer	\$768,258 (Summer 2016)	\$689,412 (Summer 2017)	\$1,082,748 (Summer 2018)
Fall	\$404,000	\$738,000	\$542,250
Winter	\$541,454	\$940,833	\$863,733

← FY17/18 budget (points to Summer 2018)

← FY18/19 budget (points to Winter 2018-19)



Executive Summary – Insights

EXISTING MARKETS (CA & NV)

- Awareness of the winter campaign is 42%, up 5% YOY, thanks to continued momentum in California and Nevada markets.
- The ads receive high ratings for communicating an awe-inspiring winter experience and Mammoth Lakes' unique winter assets and pillars.
- The ads generate visit interest and winter visitation.
- Among visitors, the ads generate trip planning research, particularly on MLT's website, social media pages, and guides. Visitors also report being influenced by air service ads.

NEW MARKET: DENVER

- First-year market establishing MLT at 21% awareness.
- The ads positively impact perceptions of Mammoth Lakes.
- Interest in winter visitation remains lower than SMARI industry average, that said, Denver itself is a snow destination, so moving the needle on visit interest to a new snow destination among these consumers will take time.

Executive Summary – CA + NV vs. SMARInsights Benchmarks

- MLT's campaign continues to surpass industry benchmarks in the California and Nevada markets.

CALIFORNIA + NEVADA MARKETS	Winter 2017-18	Winter 2018-19	Benchmark
Awareness	38% overall 50% among snow travelers	43% overall 59% among snow travelers ✓	Predicted*: 44%
Cost per aware household	\$0.32	\$0.25 ✓	\$0.32
The ads communicate that Mammoth Lakes offers an awe-inspiring winter experience	4.3 overall 4.5 among snow travelers	4.1 overall 4.2 among snow travelers ✓	Top 10%: 4.0
The ads showcase Mammoth Lakes as a great place to enjoy the outdoors and nature in winter	4.3 overall 4.5 among snow travelers	4.2 overall 4.3 among snow travelers ✓	Top 10%: 4.0
The ads make me interested in visiting Mammoth Lakes in the winter	3.8 overall 4.2 among snow travelers	3.5 overall 4.0 among snow travelers ✓	Top 10%: 4.0
The ads make me want to visit Mammoth Lakes for a leisure trip	4.0 overall 4.3 among snow travelers	3.8 overall 4.1 among snow travelers ✓	Top 10%: 4.0

* Predicted awareness is not a benchmark per se. SMARInsights' predictive model considers creative ratings, media spend, and population size.

Executive Summary – Denver

- MLT debuted its winter campaign in Denver, where there is more opportunity to generate reach and visit interest.
- The following performance sets a baseline for benchmarks to be set and measured YOY.

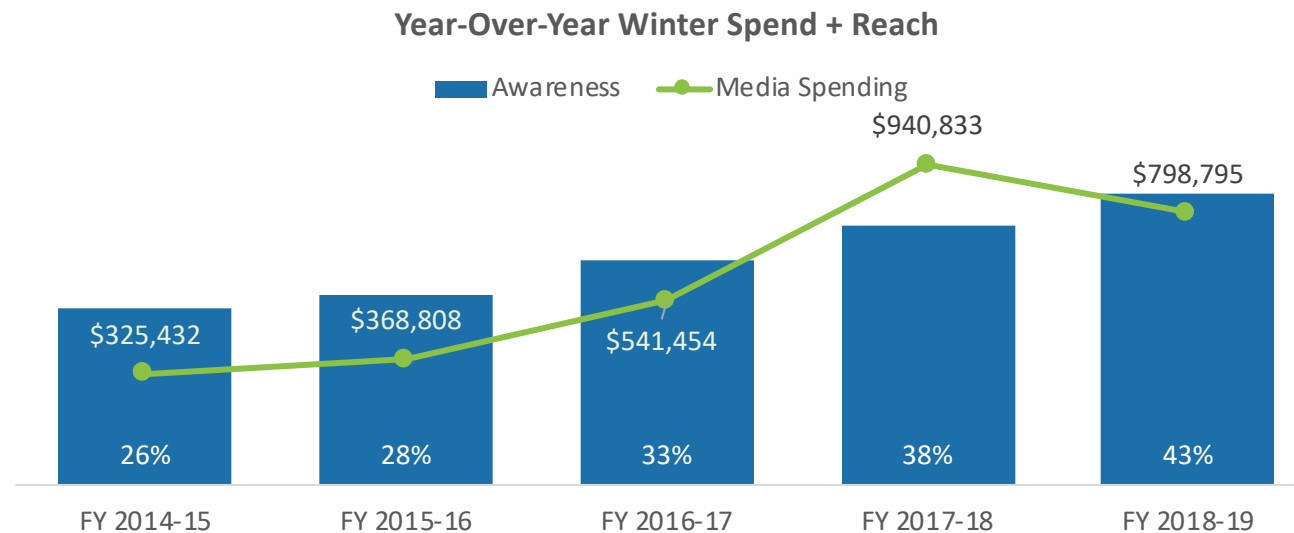
DENVER MARKET	Winter 2018-19
Awareness	21% overall 24% among snow travelers
Cost per aware household	\$0.26
The ads communicate that Mammoth Lakes offers an awe-inspiring winter experience	4.0 overall 4.2 among snow travelers
The ads showcase Mammoth Lakes as a great place to enjoy the outdoors and nature in winter	4.2 overall 4.3 among snow travelers
The ads make me interested in visiting Mammoth Lakes in the winter	3.3 overall 3.6 among snow travelers
The ads make me want to visit Mammoth Lakes for a leisure trip	3.6 overall 3.9 among snow travelers

Awareness & Efficiency

Mammoth Lakes Winter
2018-19 Ad Effectiveness
Research

Winter advertising reached 43% in the California and Nevada markets.

- Total awareness grew from 2.9M households last winter to 3.2M. This is the highest winter reach to date.
- Continued momentum of the campaign is generating awareness growth.



MLT generated higher awareness with lower spending.

- The relationship between spending and reach is summarized in the efficiency metric, cost per aware household. SMARInsights' benchmark for this metric is \$0.32, while the winter campaign is at \$0.25.
- This puts the winter campaign above average in terms of efficiency. However, while efficiency is an important metric to monitor, it is not the ultimate goal of the campaign and needs to be considered alongside the impact of the advertising on visitation and visitor spending in the community.

	Winter 2015-16	Winter 2016-17	Winter 2017-18	Winter 2018-19	% chg
Total households	7,476,644	7,476,644	7,610,828	7,359,148	
Total awareness	28%	33%	38%	43%	+13%
Aware HH	2,093,460	2,481,082	2,911,976	3,155,768	+8%
Media spend	\$368,808	\$541,454	\$940,833	\$798,795	-15%
Cost per aware household (CPAH)	\$0.18	\$0.22	\$0.32	\$0.25	-21%

**Benchmark
CPAH*:
\$0.32**

*Benchmark for CVB spot-market campaigns that do not include broadcast TV.

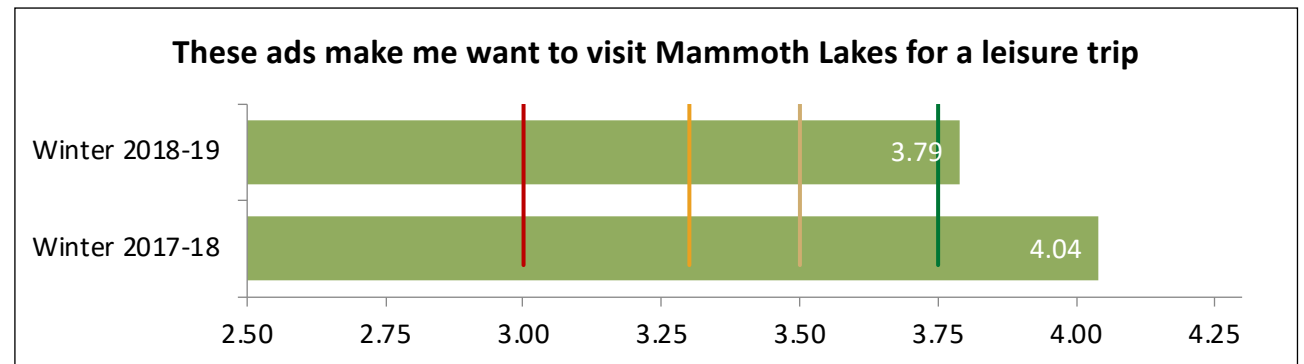
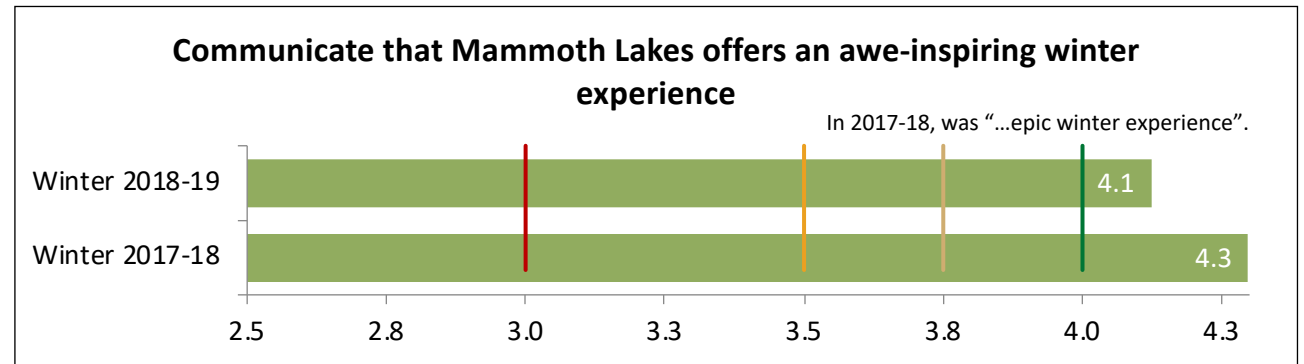
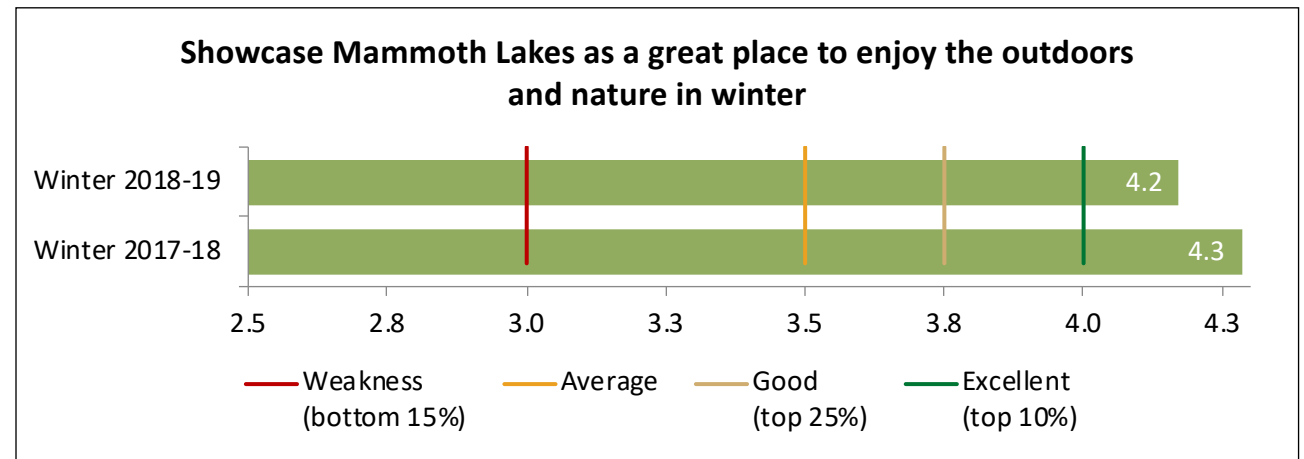
Brand Communication

Mammoth Lakes Winter
2018-19 Ad Effectiveness
Research

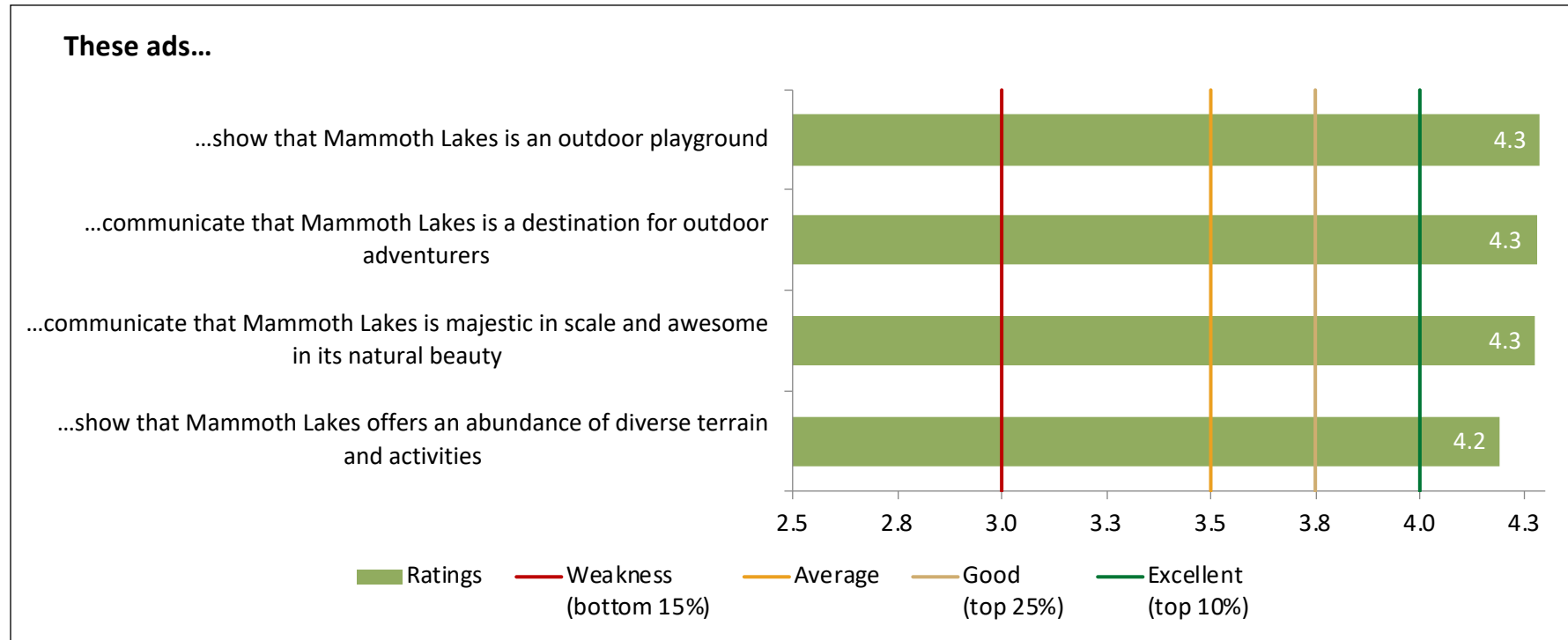
Message communication is strong, achieving excellent scores compared to industry average.

- The ads receive top 10% ratings for communicating key messaging and for generating visit interest.

Creative rating benchmarks based on all domestic destination advertising SMARInsights has tested; over 100,000 cases from over 100 leisure ad campaigns including destinations such as Chicago, Dallas, and Los Angeles. Shown are mean scores on a 5-point scale where 1=not at all and 5=very much. Benchmarks are lower for impact attributes (make me want to visit) as it is harder to motivate actions than to influence perceptions, thus these attributes generally receive lower agreement than communication attributes.



Winter ads generate “excellent” ratings for communicating MLT’s pillar assets.



Creative rating benchmarks based on all domestic destination advertising SMARInsights has tested; over 100,000 cases from over 100 leisure ad campaigns including destinations such as Chicago, Dallas, and Los Angeles. Shown are mean scores on a 5-point scale where 1=not at all and 5=very much.

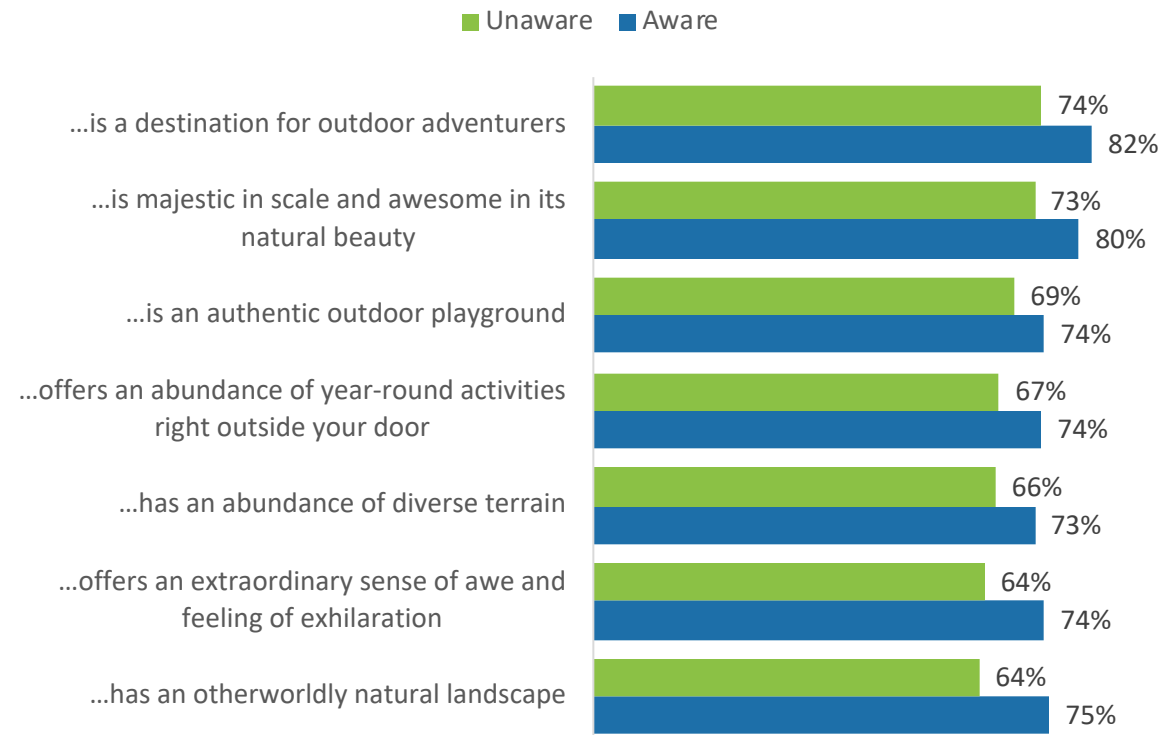
Impact of the Advertising

Mammoth Lakes Winter
2018-19 Ad Effectiveness
Research

Ads increase positive sentiment among aware travelers.

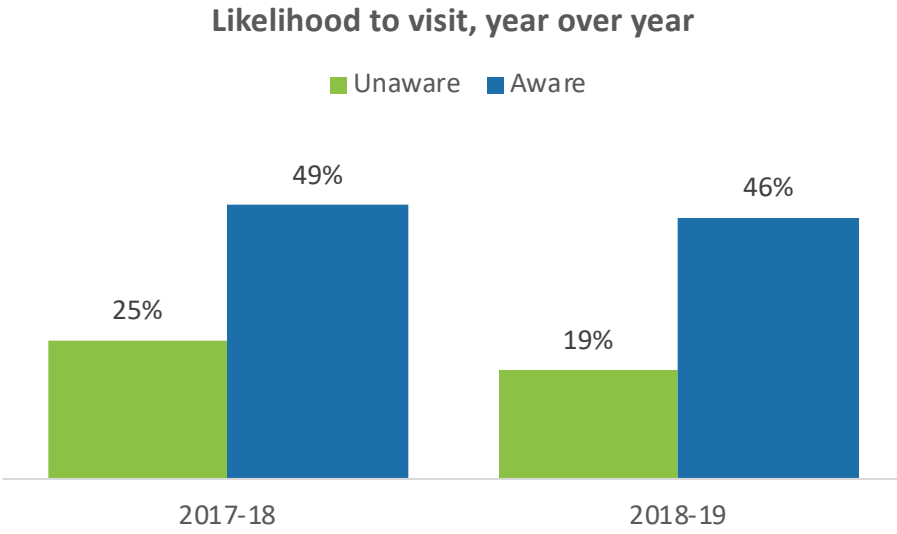
- Agreement with these pillar statements is already high among travelers unaware of the winter executions. This illustrates that Mammoth Lakes is already known this way among this population.
- However, the even higher agreement among those aware of the ads shows that the campaign is reinforcing the messaging, ensuring positive sentiment among consumers.

Top 2 Box agreement that Mammoth Lakes...



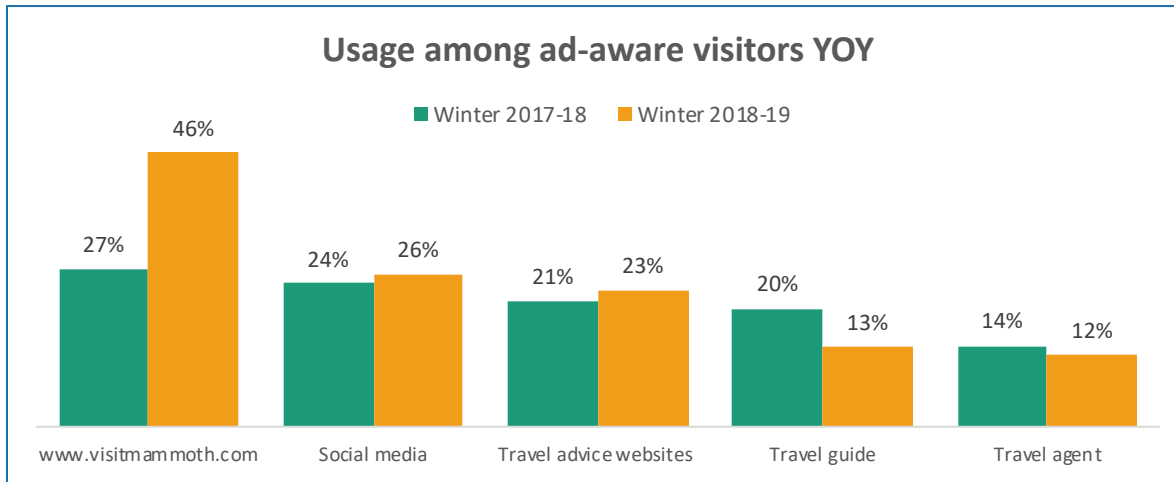
Ads generate likelihood to visit Mammoth Lakes.

- Ads continue to boost likelihood to visit Mammoth Lakes in the next 12 months by more than 20 points.



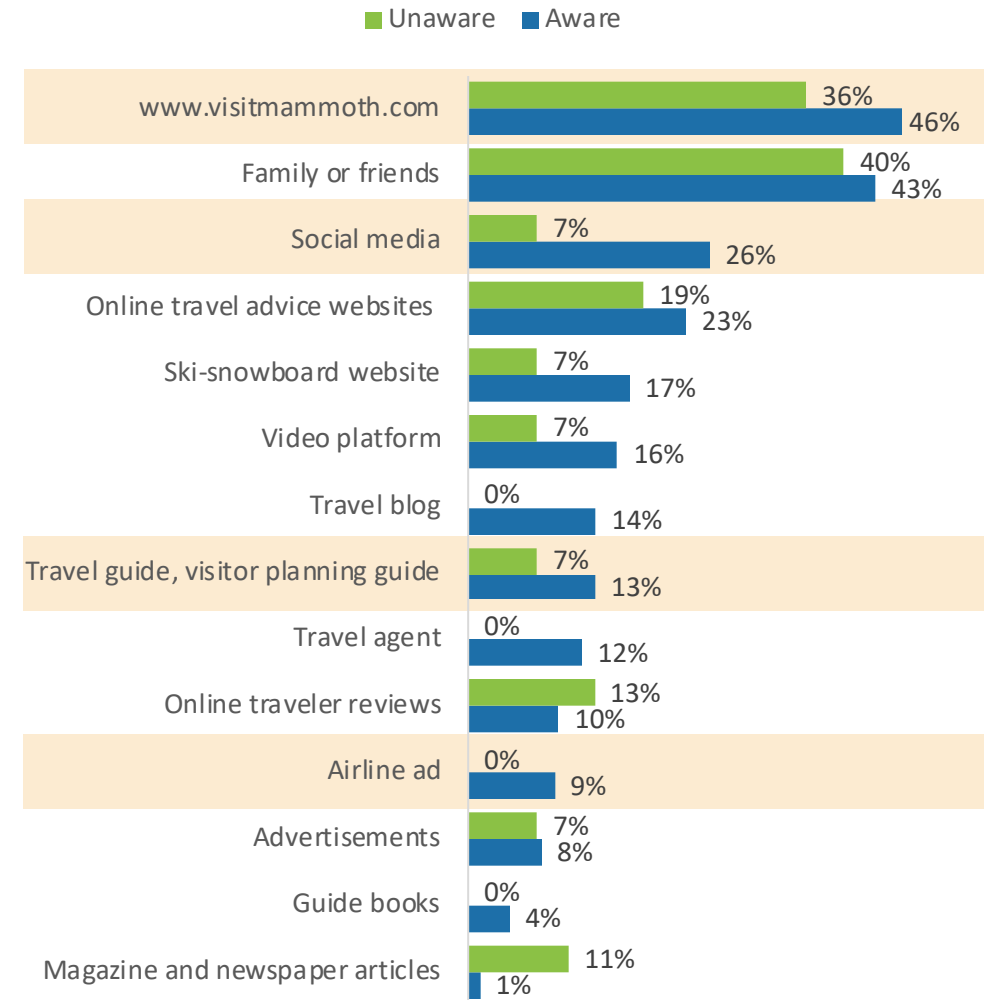
Ads motivate MLT website and social media research.

- Those aware of the destination advertising are less likely to use family and friends as a trip-planning resource and instead use MLT direct resources. The ads lead to trust in MLT resources.
- Additionally, Mammoth Lakes visitors cite airline ads as a trip planning tool.
- Comparing to last year, usage of the website is higher among ad-aware visitors. Use of other resources is similar year over year.



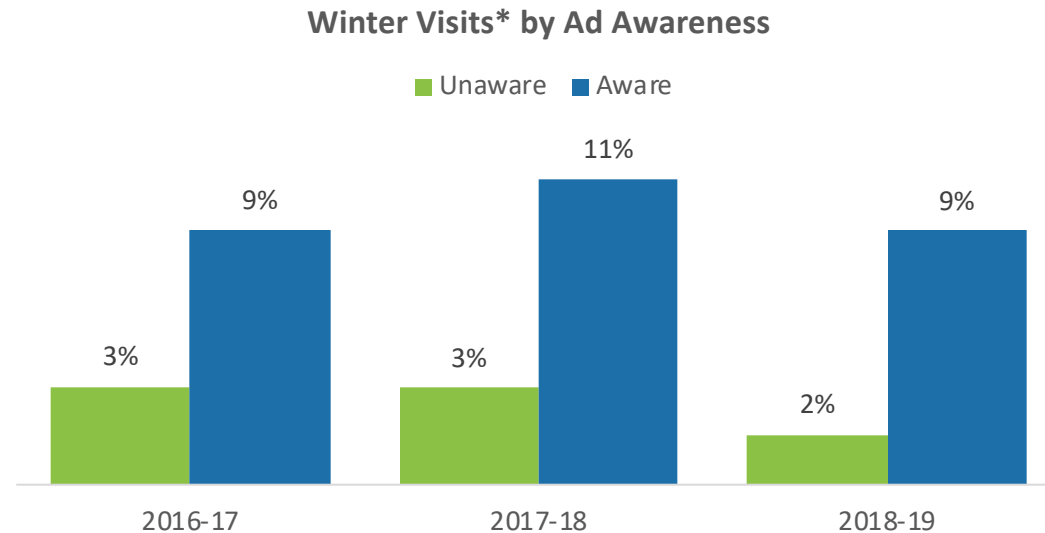
Year over year results are directional only, due to sample sizes. Not all resources asked this winter were asked last year.

Resources used to plan Mammoth Lakes trips



Ads are associated with higher winter visitation.

- The campaign generated winter visits.
- Ad-influenced visits will be analyzed more fully in the ROI report, when data on additional trips generates a more robust sample.



*At year-end, an ROI measure will be calculated using these trips and other data gathered during research throughout the year. Shown above are preliminary results and while they are accurate directionally, the trips used in the ROI calculations will be subject to more stringent qualifications such as overnight stays in paid lodging, etc.

New Market: DENVER

Mammoth Lakes Winter
2018-19 Ad Effectiveness
Research

Background & Objectives

- Winter 2018-19 marks MLT's first advertising investment beyond the California and Nevada markets; ads were also served to the Denver DMA with a nominal budget.
- The Denver market was selected to support United Airlines' recently added direct flight to Mammoth Lakes.
- Compared to California and Nevada markets, Denver is farther from Mammoth Lakes – thus getting there takes longer – and less familiar with MLT's leisure product. So the task of the ads in this new market is different.
- Further, the metrics when entering a new market are different from maintaining a presence in existing ad markets. It is important to keep in mind:
 - Even in existing ad markets, a new campaign tends to start with relatively low awareness; awareness grows as the ads continue to run and wear in with consumers.
 - In a new market, which has not received ads before, the ads must perform the additional task of introducing a new destination to consumers who may not be familiar and generating interest in learning more.
- In addition, the Denver market presents some particular challenges:
 - Travelers in this market have many of the same snow-sport experiences available to them there in Denver that MLT is offering. Motivating consumers to leave home to have a similar experience farther away and costing more is hard.
 - While the direct flight makes it easier for Denver consumers to get to Mammoth Lakes, Denver consumers have many other direct flight options to other snow-sport destinations. Therefore, MLT is competing with the Denver market itself and with other winter destinations to which residents can easily fly.

Awareness + Efficiency

- Winter ads reached 21% of the Denver market in MLT's first campaign aimed here, helping to establish a baseline for future campaigns.
- This was achieved with less than \$65,000 in advertising investment with the cost per aware household coming in at \$0.26.

CONTEXT

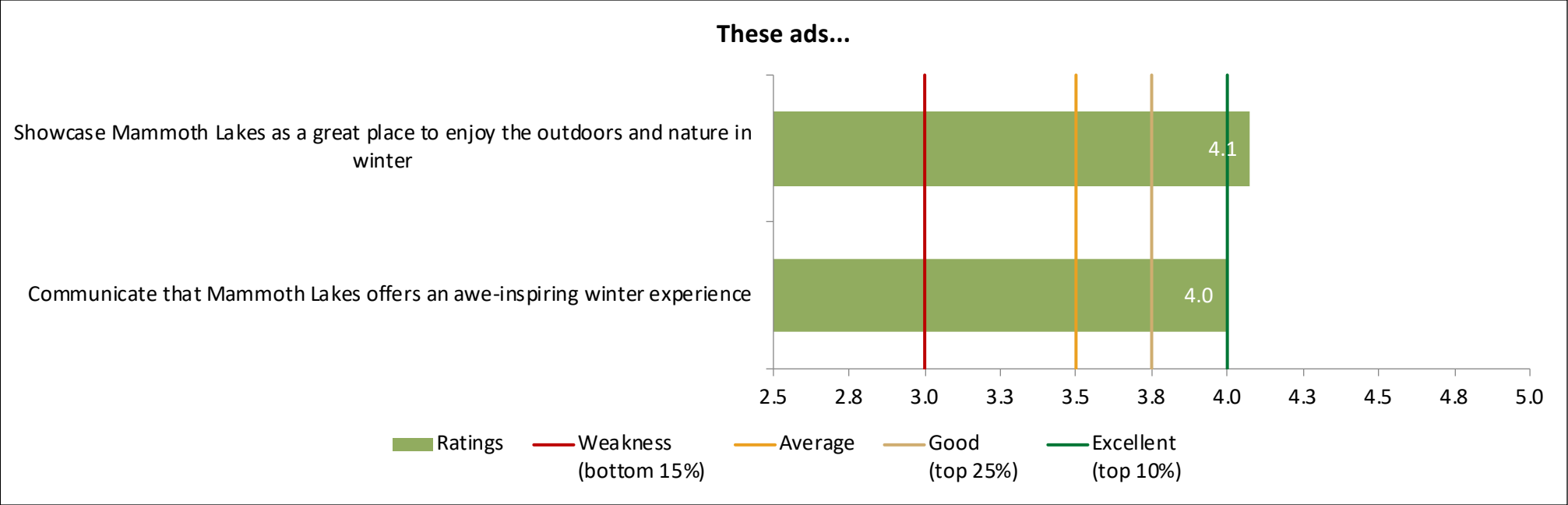
- This CPAH is when efficient compared to SMARInsights' \$0.32 benchmark used to evaluate MLT's existing CA & NV markets.
- MLT's ads debuted in winter 2014-15 in CA & NV markets at 26% with \$325K ad investment. It cost \$0.16 to reach each aware household that first winter, and this was among markets in closer proximity to Mammoth Lakes, more familiar with the destination, and with fewer close-by snow-sport and flight alternatives.
- Awareness in Denver can be built over time with continued ad investment.

Denver winter 2018-19	
Ad spending	\$64,938
HH pop	1,157,570
Awareness	21%
Aware HH	248,878
CPAH	\$0.26

* SMARInsights' predictive model considers creative ratings, media spend, and population size.

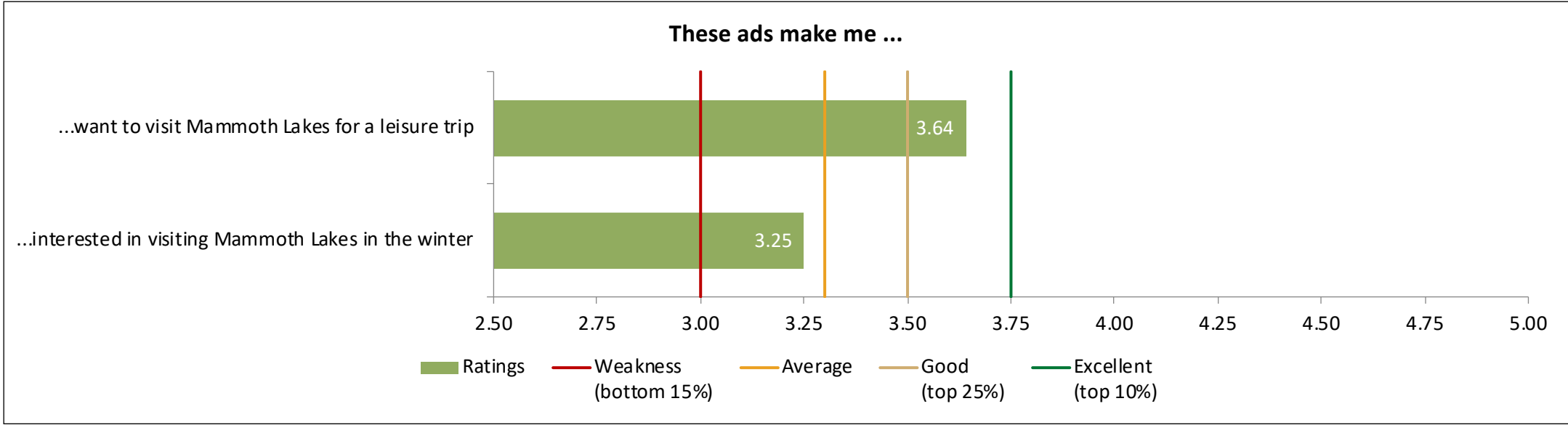
Brand Communication

- The creative receives excellent ratings among Denver consumers for communicating that Mammoth Lakes is a great place to enjoy the outdoors and nature in winter, and that it offers an awe-inspiring winter experience.
- These attributes are communication ratings, which reflect how well the ads communicate key messaging. We will see impact ratings next. Communication ratings influence perceptions, while impact ratings influence trip-planning behaviors. Perceptions move ahead of behaviors, so high communication attributes tell us the ads are affecting Denver perceptions of Mammoth Lakes.



Brand Communication

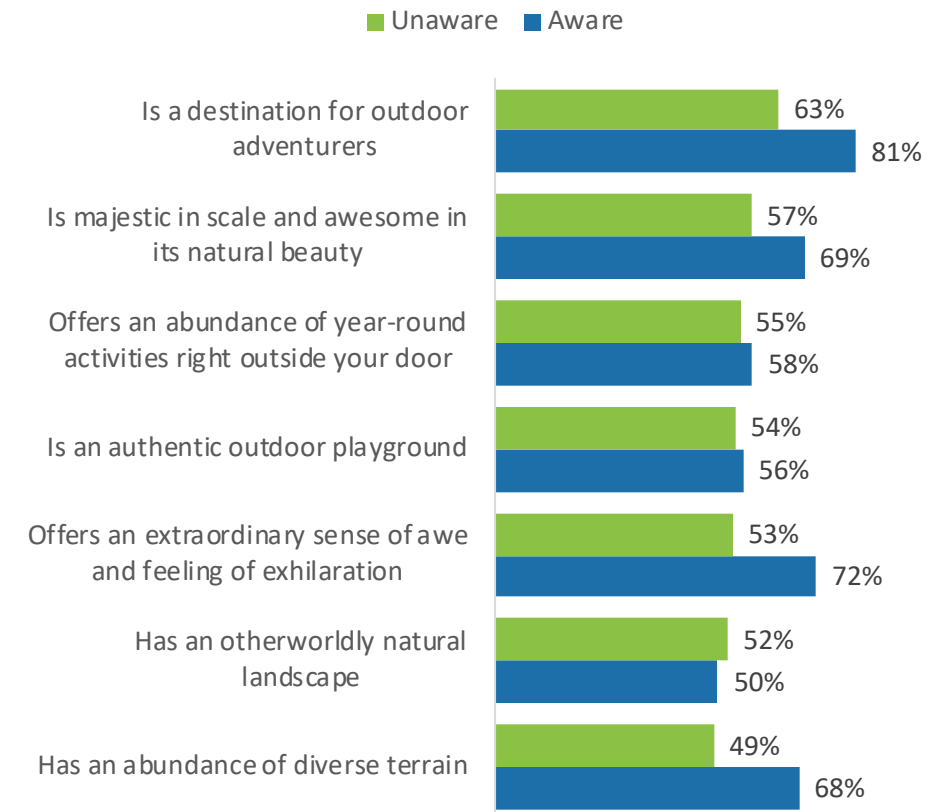
- These attributes are impact ratings, reflecting the ads' influence on behaviors. Behaviors follow perceptions. The fact that these ratings are lower relative to the benchmarks is consistent with the ads' performance in a new market. As the ads continue to run and wear in, and as perceptions continue to be influenced, we would expect impact ratings to improve.
- It is also relevant that ratings for the ads generating visit interest are in the top 25% of ads tested – meaning that these are strong at influencing general interest – but that they are below average at generating *winter* visit interest. This latter point makes sense in the context of Denver travelers having many alternatives at home and short flights away for winter leisure travel. It is a taller order to influence winter visitation from another snow-sport destination.



Impact of the Advertising

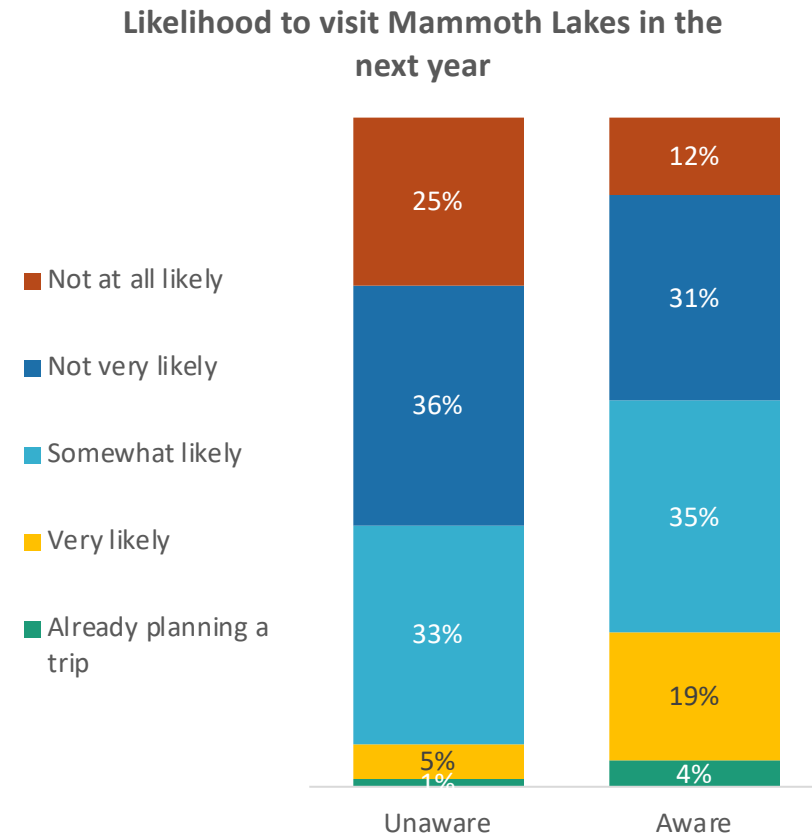
- Unaware agreement with these pillar statements is uninfluenced by the ads, and it shows us that as a baseline, Denver consumers recognize Mammoth Lakes generally as a beautiful place for outdoor activity.
- The first exposure to MLT advertising moves the needle strongly upward for Mammoth Lakes being a place for outdoor adventure, majestic in scale and awesome in natural beauty, with diverse terrain that offers awe and exhilaration.
- The ad-influenced movement of these image attributes reinforces the excellent communication ratings Denver consumers gave the ads. Again, shifting perceptions is a pre-cursor to influencing behaviors. So the impact shown here points to future visit interest and potential visitation down the road.

Top 2 box agreement that Mammoth Lakes...



Impact of the Advertising

- The unaware level of likelihood to visit Mammoth Lakes in the coming year reflects the uninfluenced response of the Denver market. Just 5% of travelers are very likely to visit in the coming year and only 1% is already planning a trip.
- Among ad-aware Denver consumers, however, the shares of visit intent are much higher. At the other end of the scale, fewer ad-aware Denver consumers are unlikely to visit, while in the middle, the shares of “somewhat likely” remain about the same. The ads shift people away from being unlikely to visit, and toward some degree of visit intent.
- While we cannot equate these preliminary levels of intention with actual trips, directionally these point to successful conversion of Denver consumers to visitors in the future.



Appendix

Mammoth Lakes Winter
2018-19 Ad Effectiveness
Research

Methodology

- The SMARInsights methodology for measuring advertising effectiveness relies on respondents viewing the actual ads. With this methodology, an email with the survey link is sent to a qualified list of potential participants and they are asked to complete the survey.
- SMARInsights conducts online research routinely and works with a number of survey vendors who have large national online panels that are demographically representative of the population. Because we use a national online panel to purchase the sample, the results can be projected to the populations of the areas surveyed.
- An online survey was conducted with 901 outdoor travelers in California, Nevada, and, for the first time, Denver.
- Data were weighted to be representative of the population. At this sample size, overall results are provided at +/- 3.26 at the 95% confidence level.

Definitions

Traveling household

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

Outdoor travelers

- Traveling households that:
 - enjoy passive or active outdoor activities and/or
 - enjoy being outdoors in nature
- Population used as the base for this research

Snow travelers

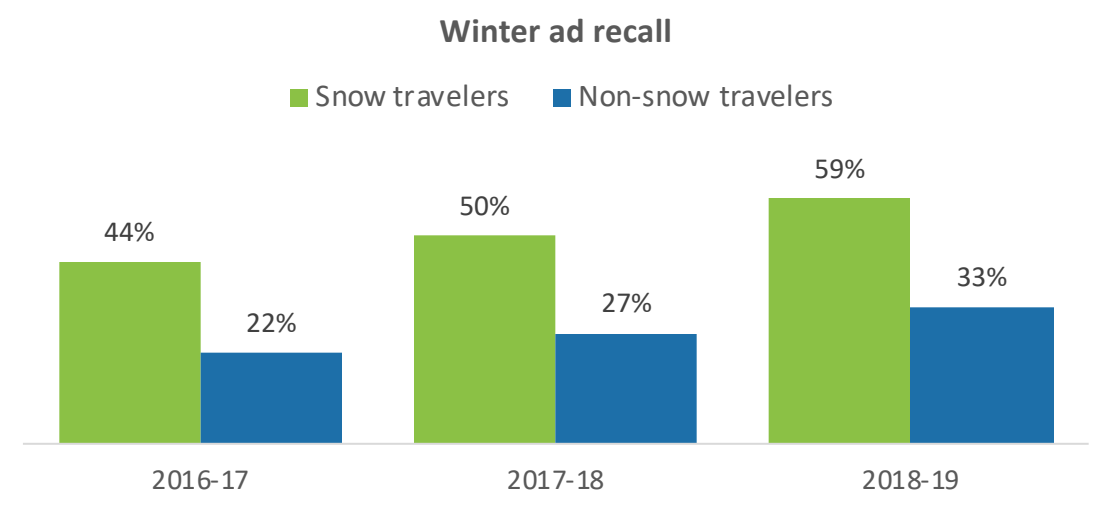
- Outdoor travelers who take snow vacations and tend to be more active outdoors
- Roughly half of outdoor travelers in the targeted geographies are snow travelers

Non-snow travelers

- Outdoor travelers who do not typically take snow vacations

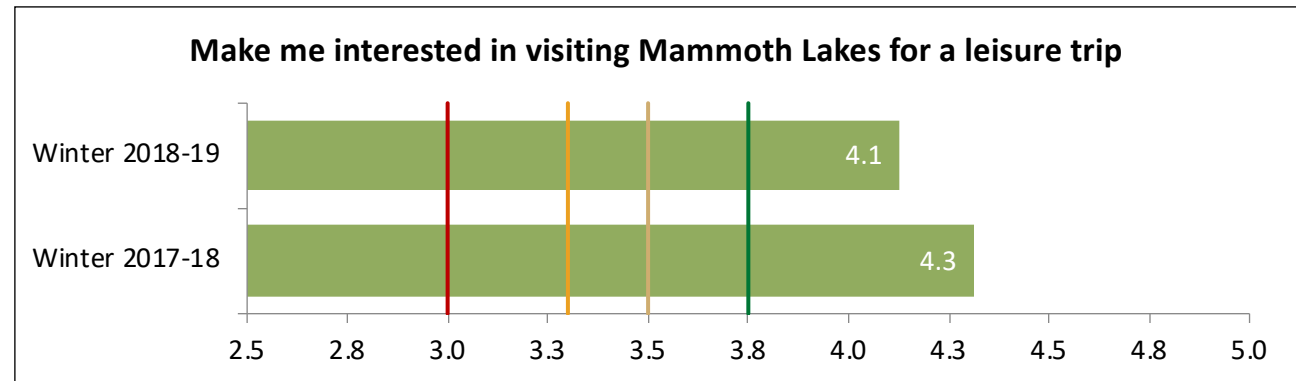
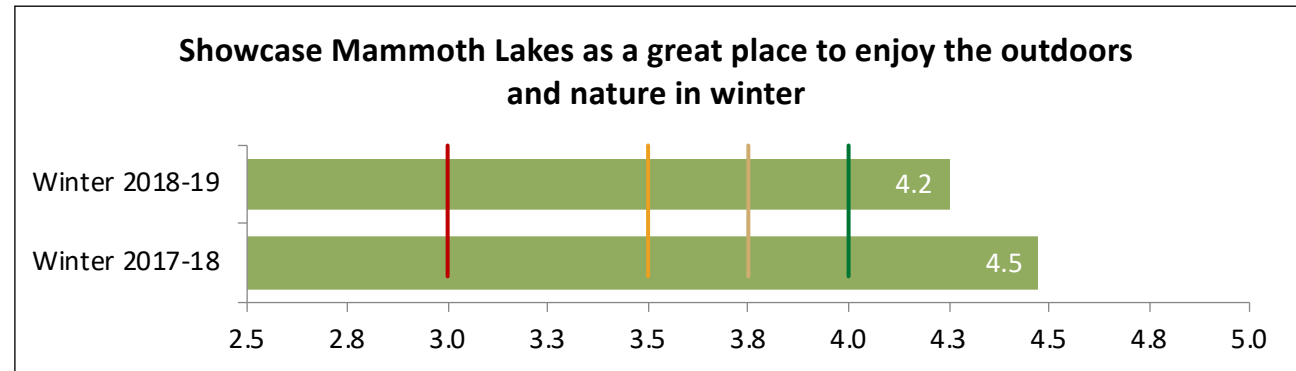
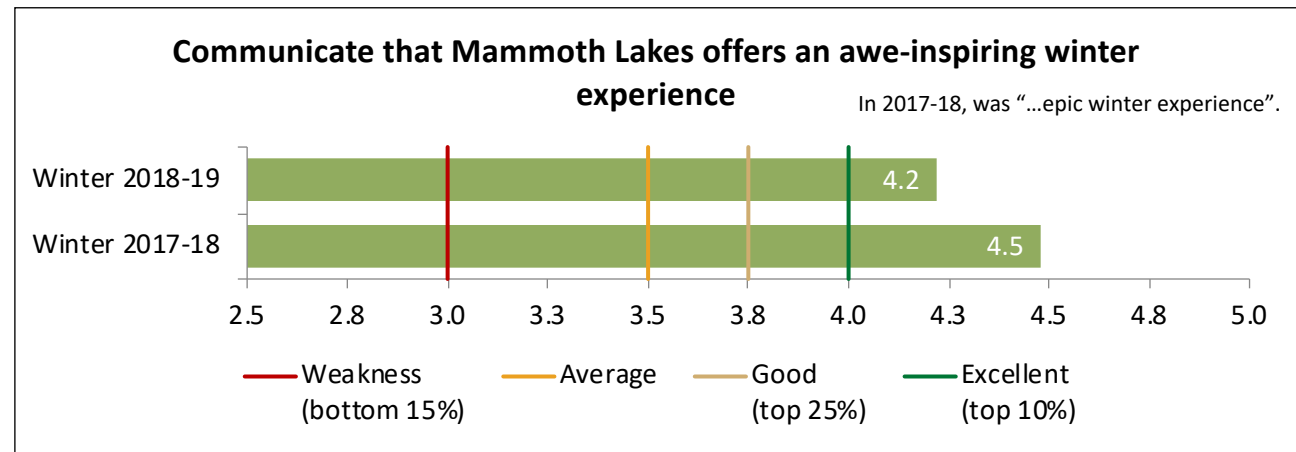
Awareness of MLT winter advertising is growing among snow and non-snow travelers.

- MLT’s target audience for its year-round messaging is outdoor travelers. Winter creative has a particular focus on snow travelers.
- Winter ads reach a higher share of snow travelers than non-snow travelers. Year over year, awareness among both populations continues to grow.



The ads are excellent at communicating winter assets to snow travelers.

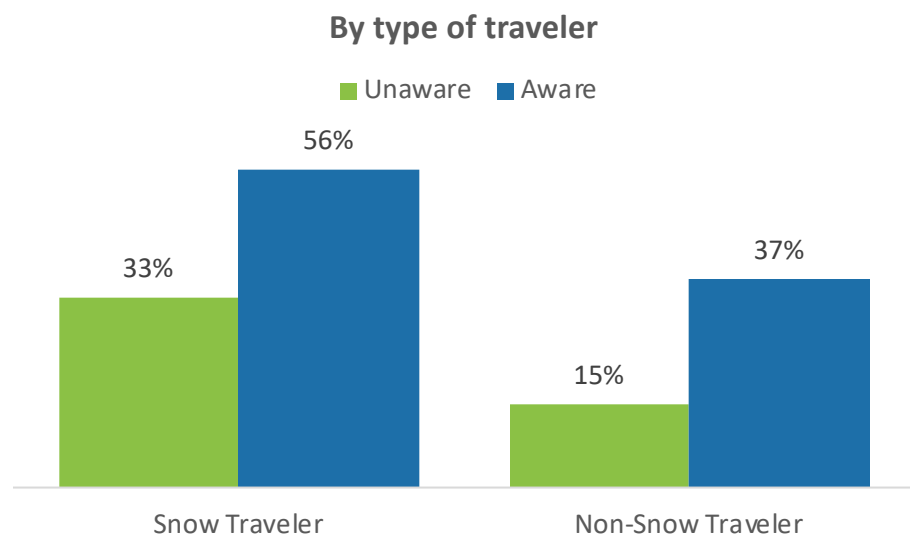
- Snow travelers rate the ads in the top 10% of ads SMARInsights has tested for communicating an awe-inspiring winter experience and showcasing the destination as a great place to enjoy the outdoors. While lower than last winter’s ratings, this is still a very positive result.



*Creative rating benchmarks based on all domestic destination advertising SMARInsights has tested; over 100,000 cases from over 100 leisure ad campaigns including destinations such as Chicago, Dallas, and Los Angeles. Shown are mean scores on a 5-point scale where 1=not at all and 5=very much.

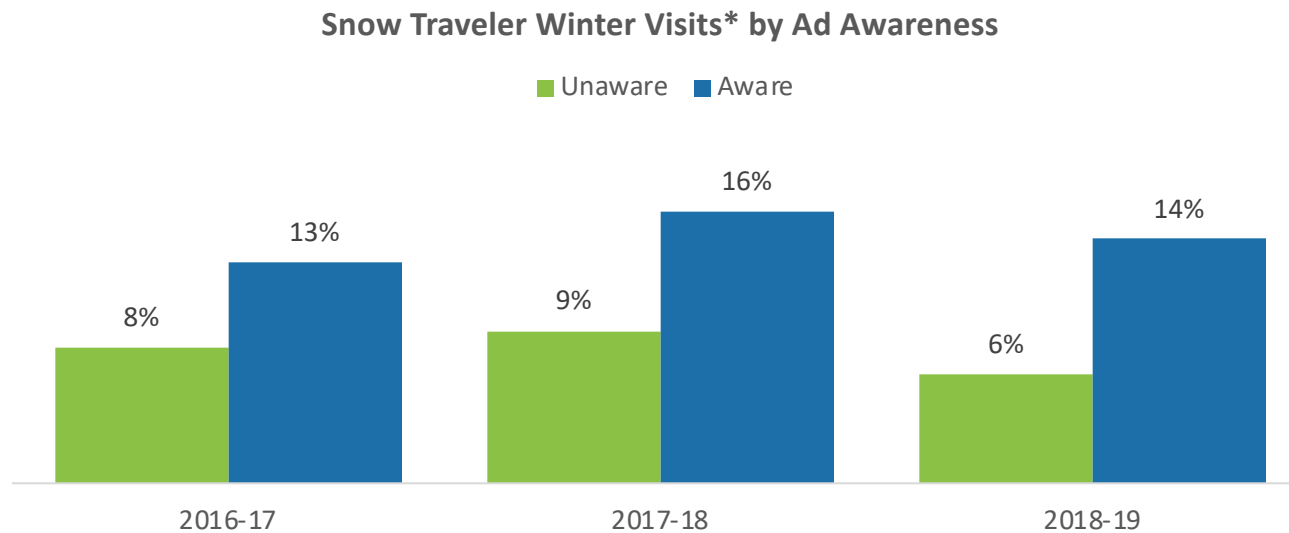
Among snow travelers, more than half of those who recall the ads intend to visit Mammoth Lakes in the coming year.

- The ads generate a more than 20-point lift in visit intent among snow travelers and non-snow travelers. But baseline (unaware) visit intent is higher among snow travelers.



Ads are associated with higher winter visitation.

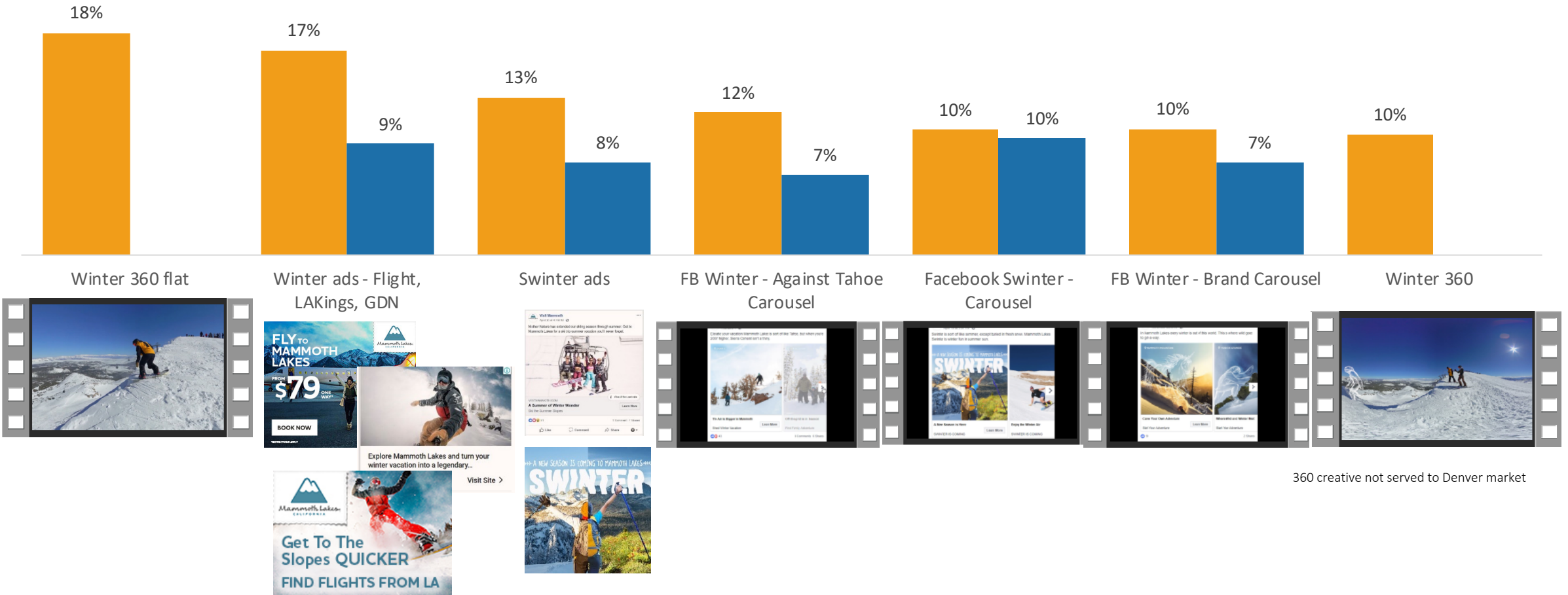
- The winter ads generated winter visits.
- Ad-influenced visits will be analyzed more fully in the ROI report, when data on additional trips generates a more robust sample.



*At year-end, an ROI measure will be calculated using these trips and other data gathered during research throughout the year. Shown above are preliminary results and while they are accurate directionally, the trips used in the ROI calculations will be subject to more stringent qualifications such as overnight stays in paid lodging, etc.

Awareness of Individual Winter Ads

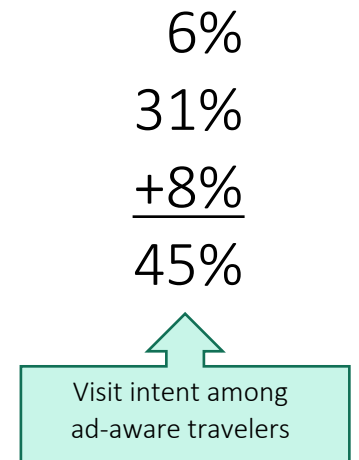
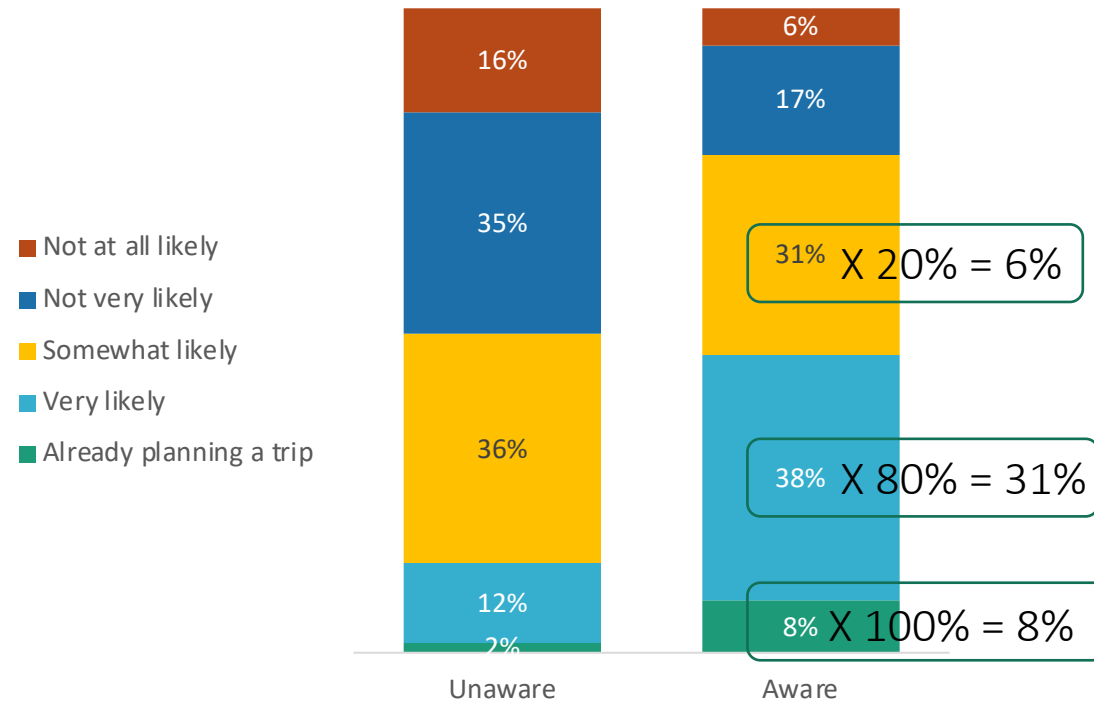
■ CA + NV ■ Denver



Visit Intent Calculation

- The visit intent algorithm is one that SMARInsights has developed from years of destination research comparing intent to subsequent actual travel.
- Visit intent is calculated as:
 - 100% of those already planning a trip, plus
 - 80% of those very likely, plus
 - 20% of those somewhat likely to visit

How likely are you to visit Mammoth Lakes in the next year?



Snow traveler demographics

Winter 2018-19	Snow traveler	Non-snow
18-34	41%	21%
35-54	37%	31%
55+	22%	48%
Married	53%	53%
Single/Never married	33%	29%
High school or less	9%	11%
Some college/technical school	25%	28%
College graduate	46%	37%
Post-graduate degree	20%	24%
Kids in HH	35%	20%
Under \$75K	47%	49%
\$75-\$149K	35%	35%
\$150-\$299K	14%	13%
\$300K+	4%	3%

Questionnaire

Mammoth Lakes, California (Mering Carson)
Winter 2018-19 Ad Effectiveness

ZIP. What is your ZIP code? _____

Decision maker. Who in your household is primarily responsible for making decisions concerning travel destinations?

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

Please indicate if each of the following applies to you...

[ROTATE]	YES	NO
I use video streaming services like Hulu or Netflix		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to stay healthy		
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]
I regularly use social media such as Facebook, Twitter, or Instagram		
I enjoy outdoor activities (passive or active)		[OUTDOOR TRAVEL SCREENERS]
I enjoy being outdoors in nature		

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

SNOW. Have you been on a snow vacation in the past 2 years? (The vacation could have included snow-sporting or just enjoying winter scenery.)

- Yes [SNOW TRAVELER]
- No

S1. If you were thinking about taking a leisure trip to a place with mountains, lakes and an abundance of outdoor activities, where would you go? _____

S2. Have you visited Mammoth Lakes, California, in the last year for a leisure trip?

- Yes
- No → [AFTER SCREENERS, SKIP TO Q13A]

S2A. Are you open to a leisure trip to Mammoth Lakes, California...

- in winter? YES/NO - in spring YES/NO
- in summer? YES/NO - in fall? YES/NO

[TERMINATE IF OUTDOOR TRAVEL SCREENER QUESTIONS BOTH=NO & S2=NO & Q2A=NO FOR WINTER, SPRING, SUMMER, & FALL]

[END OF SCREENERS]

Strategic Marketing & Research, Inc.

- 1 -

VISITATION

Q1. When during the past year did you travel to Mammoth Lakes for a leisure trip? [SHOW MONTHS JULY 2018-JUNE 2019; ADD MONTHS AS THEY OCCUR BASED ON WHEN SURVEYING TAKES PLACE]

Select all that apply.

Winter = December-March
Spring = April-June
Summer = July, August
Fall = September-November

Q2. [SHOW FIRST MONTH SELECTED] Was this your first time visiting Mammoth Lakes? YES/NO

Q3B. Which days of the week were you in Mammoth Lakes on this trip? Select all that apply.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
--------	---------	-----------	----------	--------	----------	--------

Please tell us a little more about your most recent leisure trip to Mammoth Lakes in [MONTH YEAR].

Q4. How many nights did you stay in Mammoth Lakes during this trip? If you did not stay overnight, please enter '0'. _____

Q5. Including you, how many people were in your travel party? _____

Q6. [ASK IF Q5>1] How many people in your travel party were children under the age of 18? _____

Q6A. How did you travel to Mammoth Lakes for this trip?

- Flew
- Drove

Q6B. 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 Q4=0, SKIP TO Q9_X]

Q7. While in Mammoth Lakes, did you stay...?

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

Strategic Marketing & Research, Inc.

- 2 -

Q8. [SHOW ONLY PAID ACCOMMODATIONS (RENTAL UNIT 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/Airbnb/house)
- Hotel/motel
- RV park/campground
- Other paid accommodations

Q9_x. Approximately how much did your travel party spend in Mammoth Lakes on the following non-lodging items during your [MONTH YEAR] trip?

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

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

Q9. Which of the following activities did you participate in during your [MONTH YEAR] trip? Select all that apply. [ROTATE ACTIVITY GROUPS]

Skiing & Snowsport
Downhill skiing
Cross country skiing
Backcountry skiing
Snowboarding
Snowmobiling
Snowcat tour
Snowshoeing
Ice skating
Sledding
Ice climbing
Tubing
Fat biking
Other snow sport, specify _____
Viewing & Enjoying Natural Scenery
Scenic drives
Scenic helicopter
Gondola rides
Visiting geological formations unique to the area
Fall colors
Sightseeing
Viewing mountains, lakes, etc.
Other, specify _____
Outdoor Activities
Hiking

Strategic Marketing & Research, Inc.

- 3 -

Questionnaire

Backpacking / mountaineering
High altitude training
Nature walks
Wildlife watching
Rock climbing
Horseback riding
Boating
Kayaking
Paddle boarding
Fishing
Off-roading
Golf
Running
Swimming
Road biking [ANCHOR POSITION]
Mountain biking [ANCHOR POSITION]
Other biking [ANCHOR POSITION]
Other outdoor activity, specify _____
Special Events
Festivals and events (music, food, arts, etc.)
Cycling/running event
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
Mining history
Visiting a brewery
Visiting a spa
Fine dining or eating at a local restaurant
Shopping
Entertainment and nightlife
Visiting a national park, forest, or monument
Other, specify _____
None of these activities [EXCLUSIVE]

Q9_1. [SHOW ACTIVITIES SELECTED IN Q9 AND None of these] Which of these activities motivated your Mammoth Lakes vacation planning? *Select up to 5.*

Q9A. Thinking about your overall experience in Mammoth Lakes, would you say it was...?

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

Strategic Marketing & Research, Inc.
- 4 -

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.

Q9B. 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)
 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 like Frommer's or Lonely Planet
 Magazine and newspaper articles
 Advertisements (television, online, magazine, etc.)
 Airline ad
 Social media (Facebook, Twitter, Instagram, etc.)
 Online traveler reviews
 Travel guide, visitor planning guide
 Travel agent
 Travel blog
 Ski-snowboard website
 Trade show
 Video platform (YouTube, Vimeo)
 Other, please specify _____
 Did not gather information

Q10d. 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 there
Yes, I've always wanted to go there
Yes, I was attending a planned event (tournament, meeting, wedding, etc.)
Other, please specify _____
No, I was not familiar with Mammoth Lakes prior to my recent trip

Q13A. [UNAIDED BRAND AWARENESS] How much do you agree that Mammoth Lakes...?

[ROTATE]	Not at all	2	3	4	Very much
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					
Has an otherworldly natural landscape					

Strategic Marketing & Research, Inc.
- 5 -

Q14. 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	

Q15. How likely are you to take a leisure trip to Mammoth Lakes in the next year?

Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
-------------------	-----------------	-----------------	-------------	-------------------------

AD AWARENESS

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions. [ROTATE MEDIA; ROTATE ADS WITHIN EACH MEDIUM. SHOW WINTER SECTION FIRST; GROUP ADS AS SHOWN (ONLY VIDEOS ARE SHOWN INDIVIDUALLY)]

[ASK WINT1-2a AFTER EACH GROUP]

WINT1. Do you recall seeing [either/any] of these winter ads for Mammoth Lakes? YES/NO

WINT2. What is your reaction to these ads?

- Positive
- Negative
- Neutral

WINT2a. [ASK IF WINT2 IS NEGATIVE; ASK] Why do you feel that way? _____

[PROGRAMMING - Show all ads together and ask if they've seen "any/either of these ads/articles" unless videos or otherwise indicated]

Winter full length



Full-Length Winter.mp4
Vimeo - 342983216




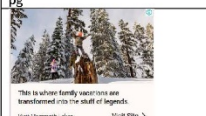

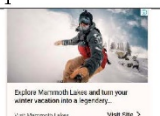

Winter 360 flat



2D 360 Air_Service_Generic.mp4
Vimeo - 342984798

Strategic Marketing & Research, Inc.
- 6 -

Questionnaire

		
MAM_Flight_Matador_300x250.jpg	MAM_LAKings_PartnerTag 3	MAM_LAKings_PartnerTag 1
		
GDN Family	GDN Backcountry	GDN Wild
		
GDN Winter Awe		

Facebook winter: Brand Carousel



Carousel - Brand Ad.mp4
Vimeo - 339146264

Facebook winter: Against Tahoe Carousel




Carousel - Against Tahoe.mp4
Vimeo - 339147887

Strategic Marketing & Research, Inc.
- 7 -

			
GDN Swinter	MAM_Swinter_Carousel_opt1_1080x1080-1	FB swinter chairlift	FB swinter jump

Facebook swinter: Option 1 Carousel





Carousel - Option 1.mp4
Vimeo - 339149313





[AFTER SHOWING ALL WINTER ADS, ASK]
WINTGRID. Thinking about all of the ads you've just seen, please indicate how much you agree that these ads...

[ROTATE]	Not at all	2	3	4	Very much
Communicate that Mammoth Lakes offers an awe-inspiring winter experience					
Showcase Mammoth Lakes as a great place to enjoy the outdoors and nature in winter					
Make me interested in visiting Mammoth Lakes in winter					

SUMMER 2018 ADS [SHOW ON ONE SCREEN – STILLS ARE FINE – WITH Do you recall seeing any of these spring/summer ads or ads like them for Mammoth Lakes? YES/NO]







	
MAM_Giant_300x250_Brand.html	Pegasus Still.jpg

Strategic Marketing & Research, Inc.
- 8 -

	
Summer OOH – Dragon.jpg	Summer OOH – Mammoth.jpg
	
Nativo - A guide to having a legendary summer.jpg	weekend sherpa - Unplug and unwind.jpg

NEW_Summer 360 video .18 cut-down.mp4
Vimeo – 303307079

Do you recall seeing this 360-degree summer video or one like it for Mammoth Lakes? YES/NO
FALL 2018 ADS [SHOW ON ONE SCREEN – STILLS ARE FINE – WITH Do you recall seeing any of these fall ads for Mammoth Lakes? YES/NO]

	
Fall Banner – Bigfoot.jpg	Fall Banner – Fairy.jpg
	
Fall Social - Carousel - benefits of awe.jpg	Fall Social - Canvas - step into adventure carousel.jpg
	
Fall Pinterest - 5 Epic Lakes.jpg	LA ONLY – Fall Banner - Lax to ML Alaskan snow mountain.jpg

Strategic Marketing & Research, Inc.
- 9 -

Questionnaire

[AFTER SHOWING ALL ADS, ASK]

GR1Da. Thinking about all of the ads you've just seen, please indicate how much you agree that these ads:

[ROTATE]	Not at all	2	3	4	Very much
Show that Mammoth Lakes is an outdoor playground					
Communicate that Mammoth Lakes is a destination for outdoor adventurers					
Show that Mammoth Lakes offers an abundance of diverse terrain and activities					
Communicate that Mammoth Lakes is majestic in scale and awesome in its natural beauty					
Make me want to visit the destination's travel website					
Make me want to visit Mammoth Lakes for a leisure trip					

WEBSITE. [SHOW IMAGE OF WEBSITE]



Have you visited this website recently? YES/NO

[IF YES, ASK] WEB2. Did you visit the website...? [ALLOW MULTIPLE]

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

GUIDE. [SHOW COVER OF 2019 VISITOR GUIDE] Have you used this Visitor Guide? YES/NO



2019 visitor guide.png

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

GUIDE3. Did you review the Visitor Guide...? [ALLOW MULTIPLE]

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

Strategic Marketing & Research, Inc.
- 10 -

SOCIAL 1. Do you follow Visit Mammoth on any of the following social channels?

- Facebook
- Instagram
- Twitter
- Pinterest
- Other
- Do not follow Visit Mammoth on any social channels

DEMOS

The following questions are for classification purposes only, and will help us understand different groups of people.

marital. What is your marital status? Are you...?

1. Married
2. Divorced/separated
3. Widowed
4. Single/never married

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

1. High school or less
2. Some college/technical school
3. College graduate
4. Post-graduate degree

PPinHH. Including you, how many people are currently living in your household? ____ [IF 1, GO TO D4]

kids. How many living in your household are children under the age of 18? ____

[IF 0, GO TO D4]

D3a. Which of the following age groups are your children? (Select all that apply.)

1. 0-4 years of age
2. 5-12 years of age
3. 13-18 years of age

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

1. Less than \$35,000
2. \$35,000 but less than \$50,000
3. \$50,000 but less than \$75,000
4. \$75,000 but less than \$100,000
5. \$100,000 but less than \$150,000
6. \$150,000 but less than \$200,000
7. \$200,000 - \$300,000
8. \$300,000 - \$400,000
9. \$400,000 - \$500,000
10. \$500,000+

Strategic Marketing & Research, Inc.
- 11 -

ethnicity. Which of the following best describes your racial or ethnic heritage? [ALLOW MULTI]

1. African American
2. Asian American
3. Caucasian
4. Hispanic/Latin American
5. Mixed ethnicity
6. Native American
7. Other

gender. Do you identify as...

1. Male
2. Female
3. Other
4. Prefer not to answer

Strategic Marketing & Research, Inc.
- 12 -