



MAMMOTH LAKES TOURISM WINTER 2019-20

Advertising Effectiveness Research



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. This year, MLT scaled back its ad investment in the California and Nevada market group, to enable expansion of its investment in Denver and a debut in the Northeast.
- This wave of research measured the following for the Fiscal Year 2019/20 Winter campaign:
 - Awareness, favorability, perceptions of the destination, and trip motivators in existing California and Nevada markets
 - Second year performance in the Denver market
 - Reach and impact of an initial wave of advertising in the Northeastern United States (NYC and Boston DMAs). This market area was selected to support existing air service routes and to generate out of state visitation.
- 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 (travelers who enjoy active or passive outdoor activities and/or being outdoors in nature), 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 March 2-7 in the Northeast and from April 20-24 in California, Nevada, and Denver.
- Typically, a fiscal year-end ROI wave would be conducted to measure overlapping awareness of seasonal campaigns and the impact on travel, as well as to gather data on more trips. However, with the interruption to visitation and funding due to the Coronavirus pandemic, the ROI wave is unlikely to happen. The task of this research then is to measure the reach and impact of the destination's advertising up to the time of Mammoth Lakes' closure to visitors in mid-March.

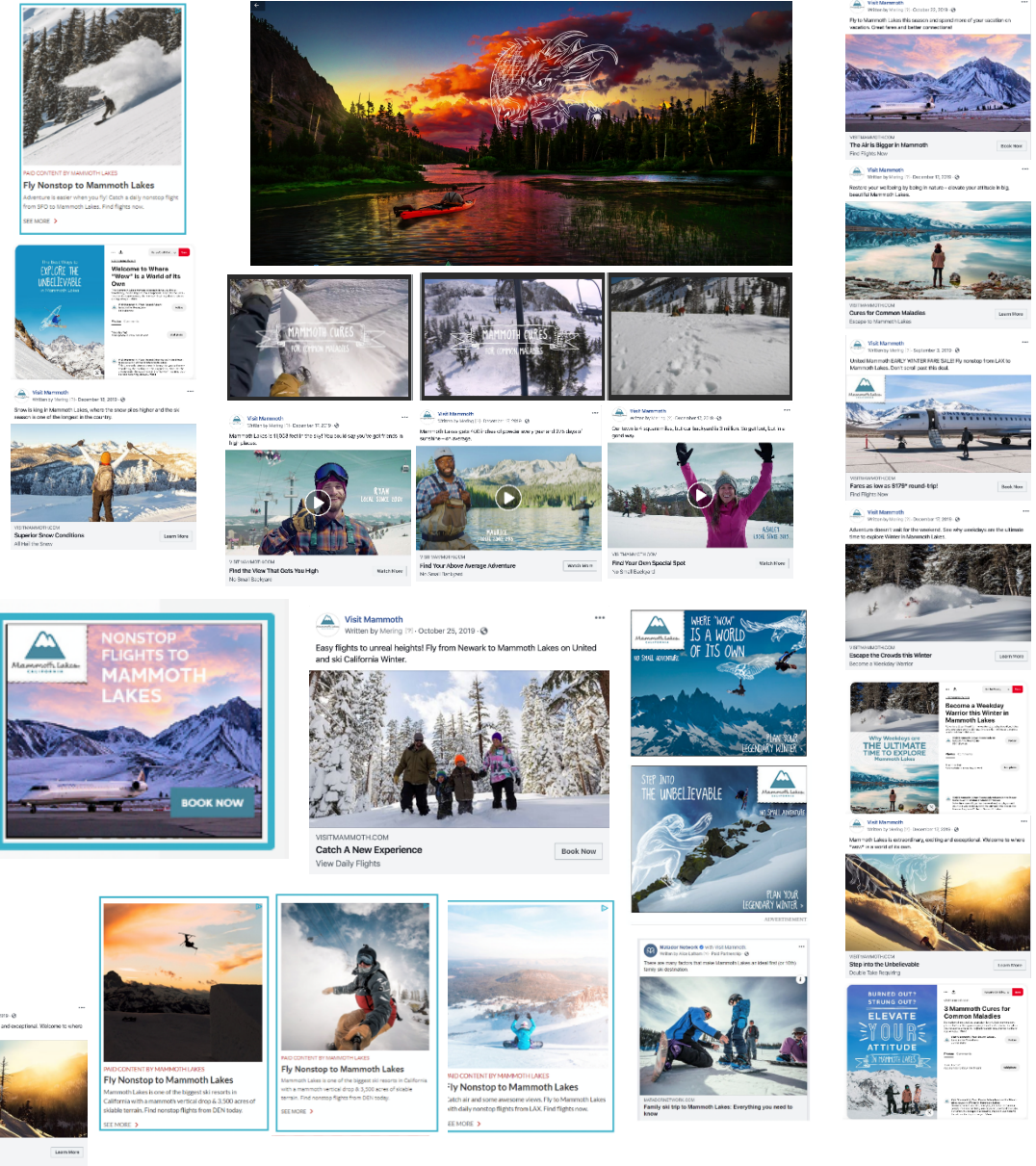
MLT FY ad investment	2018-19	2019-20
CA+NV	\$863,733	\$696,378
Denver	\$64,938	\$243,286
Northeast		\$245,820
TOTAL	\$928,671	\$1,185,484

COVID-19 (Coronavirus) Considerations

- The COVID-19 virus, also known as the Coronavirus, began to make headlines in January 2020, when China began reporting infections and deaths. By the end of January, the virus had spread to many countries, including the U.S.
- By March, the virus dominated the new cycle, as it disrupted life and caused the stock market to plummet. In mid-March, California and many other U.S. locations announced broad social distancing measures. On March 18, Mammoth Lakes Tourism posts to Instagram: “We’re asking anyone who is not a primary resident of Mammoth Lakes or providing essential services to our residents NOT to visit Mammoth Lakes for the time being. The reason is simple: as a small, remote mountain community our healthcare facilities lack the capacity to handle a widespread outbreak of COVID-19... This is a hard message for us to send, as we know how many of you cherish Mammoth Lakes and the wilderness that surrounds it, but we ask you to respect our community and this request to stay home for now. If we all work together to do the right thing during this public health crisis, we’ll all be able to enjoy the Mammoth Lakes area in a responsible and respectful way sooner rather than later.”
- By early April, many states announced schools would remain closed for the rest of the academic year. By month’s end, there were more than a million confirmed cases of COVID-19 in the U.S. There also were protests around the country by those who feel the public health precautions were an overreaction. There was significant tension between pandemic safety measures and economic stimulus measures.
- In early May, some states published multi-stage plans for re-opening community businesses; there was no federal plan to reopen the country as a whole and efforts were regional or state-specific. Some municipalities tried to fight Gov. Gavin Newsom’s order to close area beaches.
- These events took a toll on U.S. leisure travel. This Mammoth Lakes Tourism winter ad effectiveness research fielded in late April. During this time we did not see any drop in consumer willingness to take a survey. Consumer sentiment regarding travel did change, as many people canceled or postponed leisure trips. But given the fact that this research is mostly backward-looking we are confident that we have collected representative and meaningful data. Backward-looking means that the key data inputs concern past behavior such as exposure to ads and leisure travel during 2019 and pre-closures in early 2020. There are some measures that could be susceptible to bias such as destination perceptions and ad ratings – but competitively everyone is on the same playing field. So it is important to keep the situation in mind when interpreting certain research results. Finally, Coronavirus-specific questions were added to the survey to use as a diagnostic tool for any changes that we see.

Campaign Overview

- The “No Small Adventure” Campaign is a multi-year, multi-season brand campaign. The look of the seasonal display and video ads is consistent with creative that has run for several years. The research looks at reach and impact of individual winter executions, within the context of the larger campaign.
- The research tested Winter 2019-20 seasonal ads:
 - Brand and social videos
 - General winter seasonal assets
 - Winter air service assets
- Winter ads began in Denver and the Northeast in late September, in California and Nevada in late October. Ads ran through mid-February as scheduled in the Northeast and were pulled from remaining markets on March 15, 2020 due to COVID-19.
- Winter spending in California and Nevada totaled \$696,378 (down 19% YOY). The decrease in spending is attributed to the strategic decision to scale back ad investment in mature, near markets to begin/increase ad investment in Denver and the Northeast to increase visitation through Denver flight service.
- MLT began advertising in Denver last winter; this year nearly 4 times as much was invested in this market.
- This is the first year that MLT ran paid advertising in the Northeast.



Executive Summary – Insights

- As communities discuss strategies to re-open and consumers begin to travel, Mammoth Lakes is uniquely positioned to take advantage of pent-up leisure travel demand. SMARInsights' research has shown that drive trips to destinations featuring outdoor activities are where consumers intend to begin. Mammoth Lakes' drive visitors from in-state are likely to be the first to return, with the array of year-round outdoor assets likely to draw people looking to get away from crowds and enjoy a new environment for a time.
- The recent winter ads are among the highest rated MLT has produced, so updating this creative with relevant messaging when the time is right for visitors to return is likely to generate a positive response.
- While the pandemic closures did cut into the winter season, the ads positively impacted visitation leading up to the March closures. Of those who canceled their Mammoth Lakes trips, the canceled trips were clustered early in the year, with some extending into early summer, reflecting uncertainty about when the destination will re-open.
- It is notable as well that, despite early snowfall, Mammoth Lakes did not get snow from early December through when the destination closed due to the pandemic. This certainly impacted visitation, as other western states did get snow during this period.

EXISTING MARKETS: CALIFORNIA AND NEVADA

- Awareness of the winter campaign was 33%, down 23% YOY due in large part to a 19% reduction in spending (in CA & NV).
- The ads receive high ratings – in the top 1% of ads SMARInsights has tested – for communicating an awe-inspiring winter experience and Mammoth Lakes' unique winter assets and pillars.
- The ads generated visit interest and winter visitation.

Executive Summary – Insights

GROWTH MARKET: DENVER





- Awareness of the winter campaign is at 27%, up nearly a third from last year's debut. This is attributable to an increase in spending, as well as continuation of the campaign.
- The ads positively impact perceptions of Mammoth Lakes as well as likelihood to visit.
- Relative to the competitive set, however, Mammoth Lakes remains fairly low in terms of recent visitation and likelihood to visit among Denver travelers.

NEW MARKET: NORTHEAST

- Awareness of the debut campaign in this market is at 32%. With less than \$300,000 invested, this means a very efficient campaign at less than half what it costs most destination marketing campaigns to reach each ad-aware traveler.
- As in the other markets, the ads receive very strong ratings, indicating messaging that is relevant to the target audience.
- The ads boosted image evaluations of Mammoth Lakes, particularly in terms of how easy it is to get there and its value and increase likelihood to visit and Net Promoter Score.
- There is much opportunity for Mammoth Lakes to build market share, as the Northeast markets have higher awareness of closer-in winter destinations, Colorado, and Canada.

Executive Summary – CA + NV vs. SMARInsights Benchmarks





- MLT’s campaign continues to surpass industry benchmarks in the California and Nevada markets.
- A decline in winter spending, on the heels of lower summer and fall spending, led to lower awareness and a less efficient campaign year-over-year. But compared to average DMO campaign spending, MLT’s winter campaign remains more efficient.

CALIFORNIA + NEVADA MARKETS	Winter 2018-19	Winter 2019-20	Benchmark
Awareness	43% overall 59% among snow travelers	33% overall 40% among snow travelers	n/a*
Cost per aware household	\$0.26	\$0.27 	\$0.32
Ad impact on Net Promoter Score	50-point lift	35-point lift	
The ads communicate that Mammoth Lakes offers an awe-inspiring winter experience	4.1 overall 4.2 among snow travelers	4.4 overall  4.5 among snow travelers	Top 10%: 4.0
The ads showcase Mammoth Lakes as a great place to enjoy the outdoors and nature in winter	4.2 overall 4.3 among snow travelers	4.5 overall  4.6 among snow travelers	Top 10%: 4.0
The ads make me interested in visiting Mammoth Lakes in the winter	3.5 overall 4.0 among snow travelers	4.0 overall  4.4 among snow travelers	Top 10%: 4.0
The ads make me want to visit Mammoth Lakes for a leisure trip	3.8 overall 4.1 among snow travelers	4.2 overall  4.4 among snow travelers	Top 10%: 4.0

* With a 19% decrease in budget, current baseline awareness decreases and a new benchmark for success must be established against the lower spend level

Executive Summary – Denver

- Awareness grew from the first year of winter advertising in Denver, where there is more opportunity to generate reach and visit interest long term.
- MLT’s 2019-20 winter campaign outperformed baseline measures for awareness and ad strength, but not for efficiency of the campaign.

DENVER MARKET	Winter 2018-19	Winter 2019-20
Awareness	21% overall 24% among snow travelers	27% overall 31% among snow travelers
Cost per aware household	\$0.26	\$0.75 
Ad impact on Net Promoter Score	23-point lift	36-point lift
The ads communicate that Mammoth Lakes offers an awe-inspiring winter experience	4.0 overall 4.2 among snow travelers	4.2 overall 4.3 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	4.3 overall 4.5 among snow travelers 
The ads make me interested in visiting Mammoth Lakes in the winter	3.3 overall 3.6 among snow travelers	3.4 overall 3.8 among snow travelers 
The ads make me want to visit Mammoth Lakes for a leisure trip	3.6 overall 3.9 among snow travelers	3.5 overall 3.9 among snow travelers

Executive Summary – Northeast Market

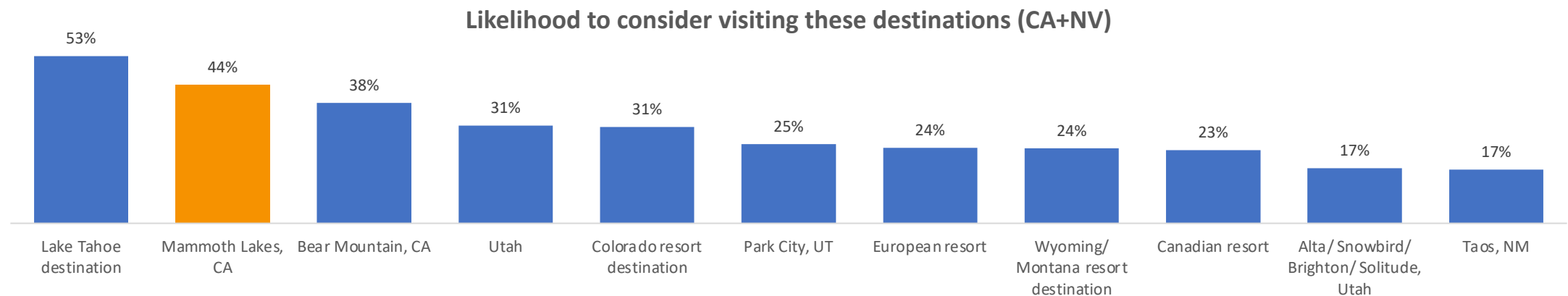
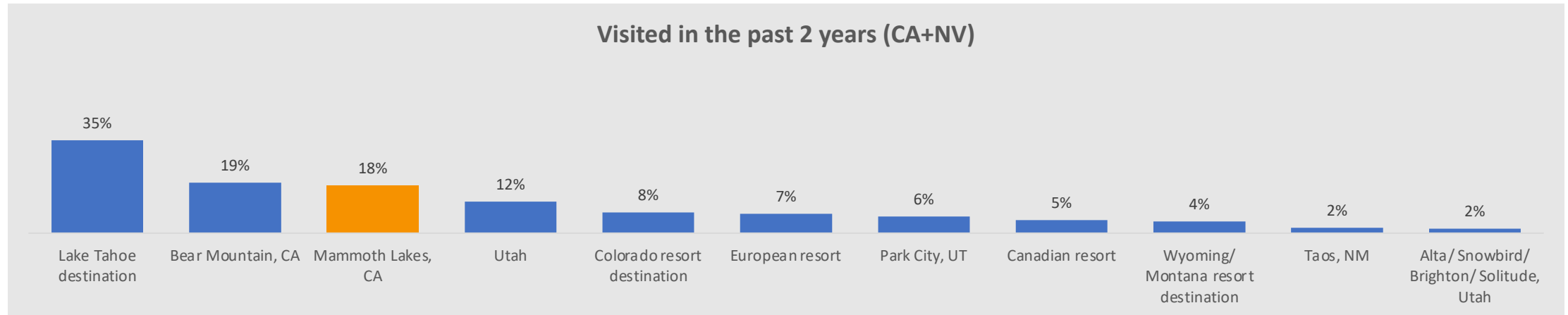
- MLT debuted its winter campaign in the New York City and Boston DMAs, where the large population and flight access create a good target.
- The following performance indicators are a baseline for future measures. This campaign was more efficient than \$0.32-per-aware-household average.

NORTHEAST MARKET	FY2018-19
Awareness	19% overall; 41% among snow travelers
Cost per Aware Household	\$0.11
Ad impact on Net Promoter Score (NPS)	64-point lift
Ad impact on Likelihood to visit Mammoth Lakes	20-point lift
The ads show that Mammoth Lakes is an outdoor playground	4.4
The ads communicate that Mammoth Lakes is a destination for outdoor adventurers	4.4
The ads communicate that Mammoth Lakes is majestic in scale and awesome in its natural beauty	4.4
The ads make me want to visit Mammoth Lakes for a leisure trip	3.9

CA + NV:
Competitive
Landscape,
Awareness +
Efficiency

Mammoth Lakes Winter
2019-20 Ad Effectiveness
Research

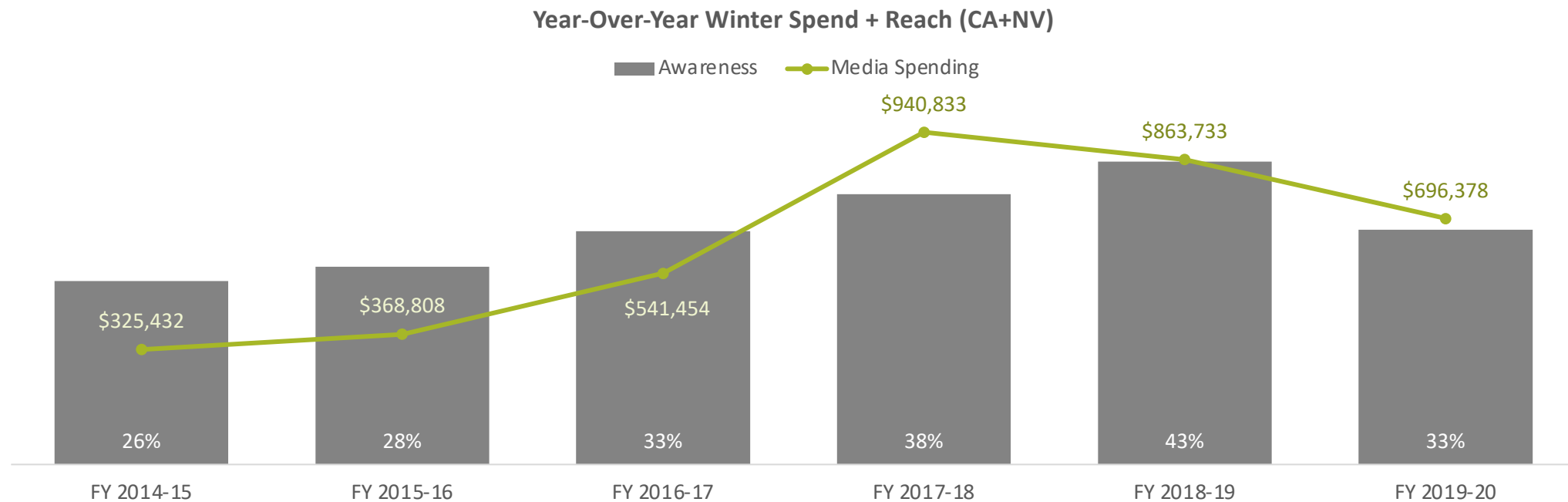
In California and Nevada, Lake Tahoe continues to hold the lead in terms of past and intended visitation; Mammoth Lakes and Bear Mountain are a fairly close second.



There was low snowfall in Mammoth Lakes after early December relative to the rest of the west. After Thanksgiving, the next significant snowfall did not come until March 15, when pandemic closures were beginning.

Winter advertising reached a third of outdoor travelers in the California and Nevada markets.

- Campaign awareness reached 33% (2.6 million households), down 23% YOY due in large part to 19% reduction in spending to allow for winter investment in Denver and the Northeast flight markets.



MLT plan shifts worked to target a more qualified visitor while remaining below CPAH.

- While awareness has declined, the campaign remains more efficient than average, costing MLT just \$0.27 per aware household, compared to \$0.32 for the average DMO campaign.
- With less budget, it was understood awareness would drop. Therefore, MLT efforts for CA/NV needed to reach the most qualified audience. To do so, HHI was increased and an outdoor qualifier was added.

CA+NV	Winter 2015-16	Winter 2016-17	Winter 2017-18	Winter 2018-19	Winter 2019-20	% chg.
Total households	7,476,644	7,476,644	7,610,828	7,873,775	7,878,069	
Total awareness	28%	33%	38%	43%	33%	-23%
Aware HH	2,093,460	2,481,082	2,911,976	3,376,452	2,618,265	-22%
Media spend	\$368,808	\$541,454	\$940,833	\$863,733	\$696,378	-19%
Cost per aware household (CPAH)	\$0.18	\$0.22	\$0.32	\$0.26	\$0.27	+4%

**Benchmark
CPAH*:
\$0.32**

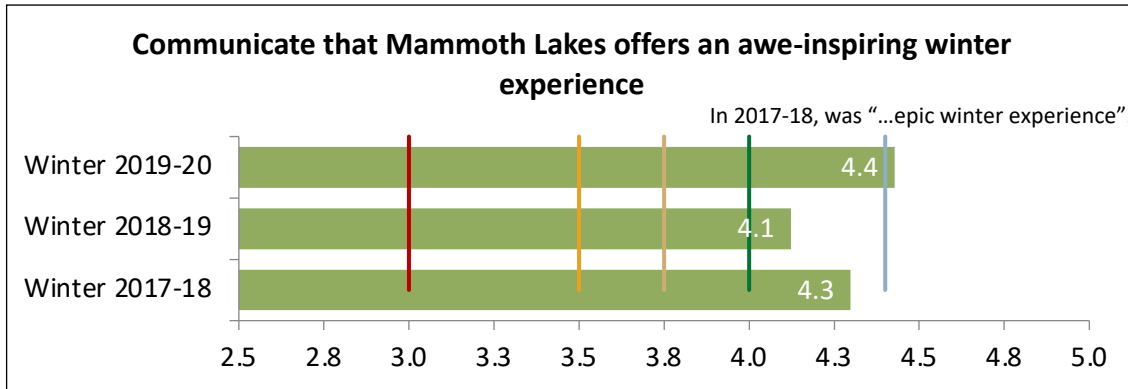
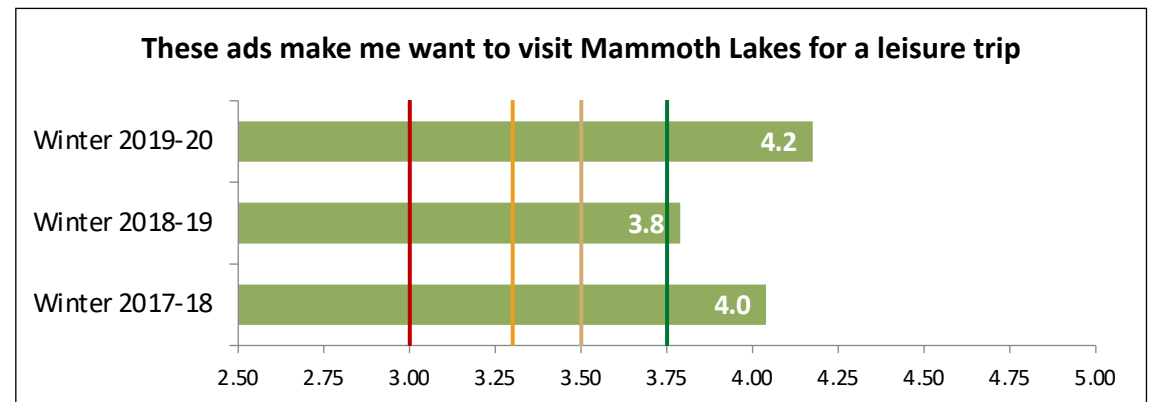
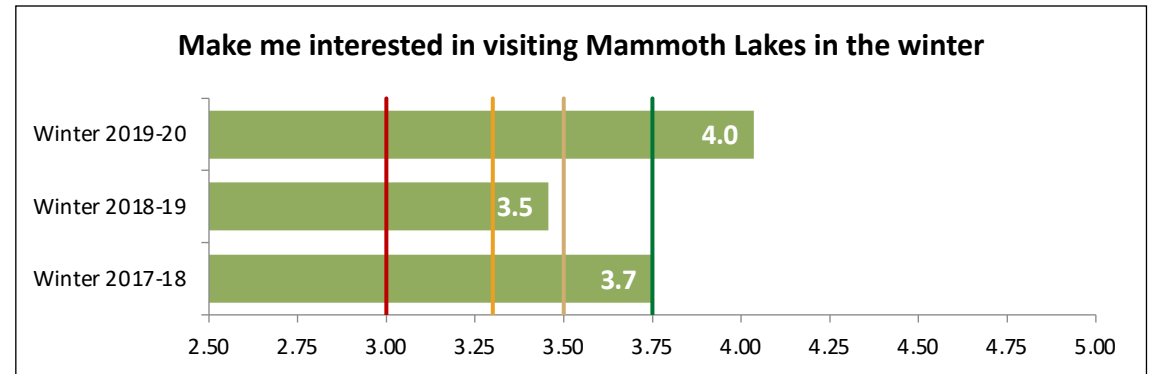
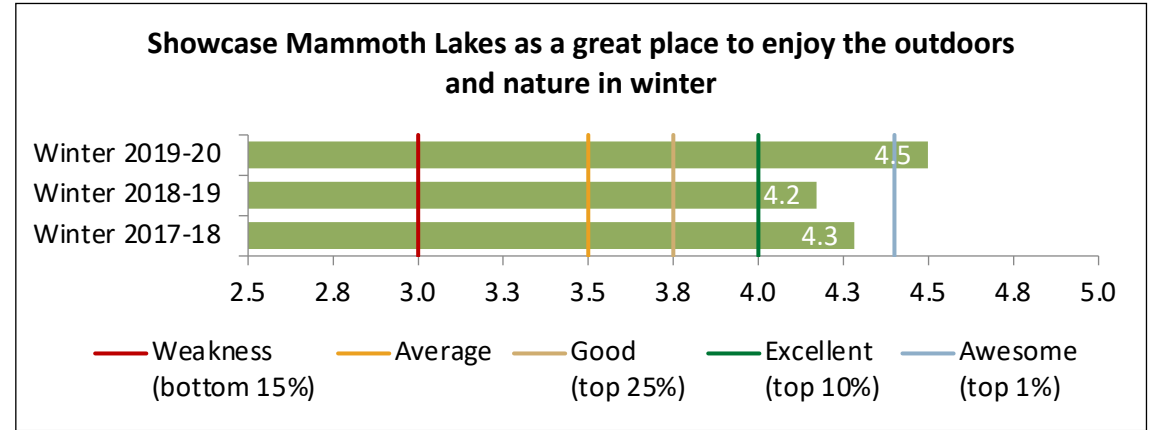
*Benchmark for CVB spot-market campaigns that do not include broadcast TV.

CA+NV: Brand Communication

Mammoth Lakes Winter
2019-20 Ad Effectiveness
Research

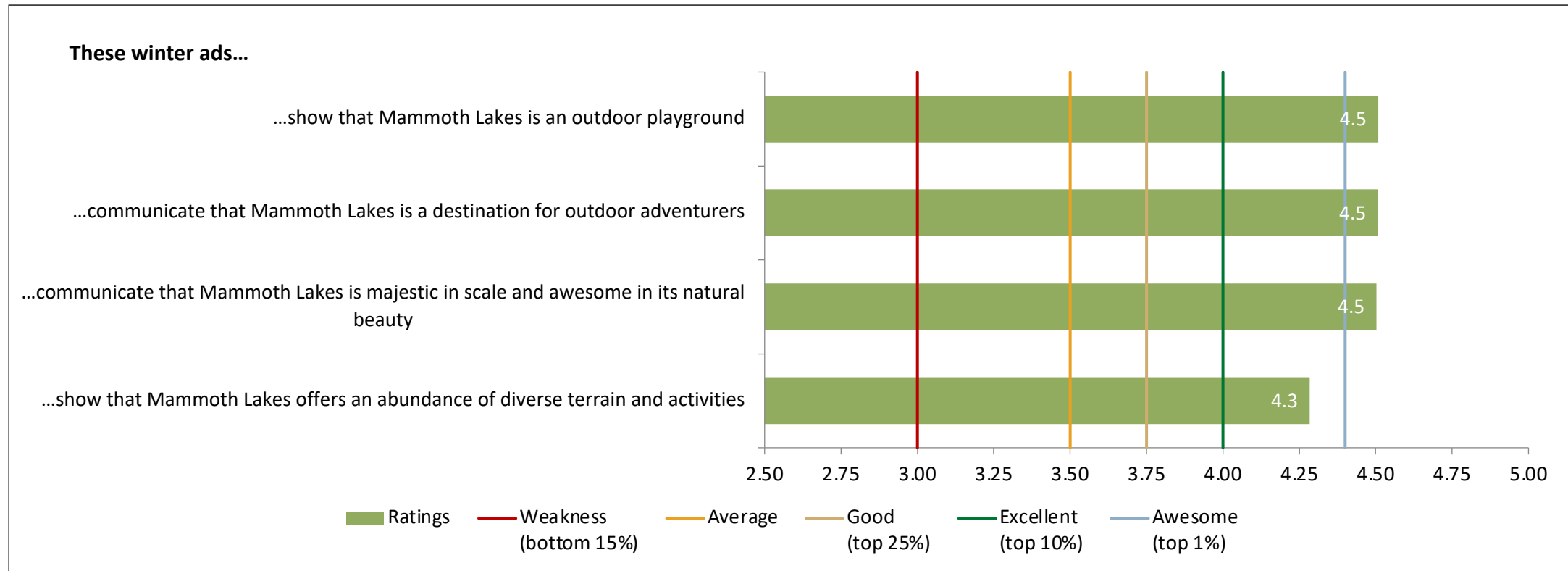
Message communication is even stronger than in years past in the California and Nevada markets.

- The ads receive top 1% ratings for communicating key messaging and top 10% for generating visit interest.
- This winter’s ads receive higher ratings than the prior two winter campaigns.



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.

Winter ads generate 'awesome' ratings for communicating MLT's pillar assets among travelers in California and Nevada.



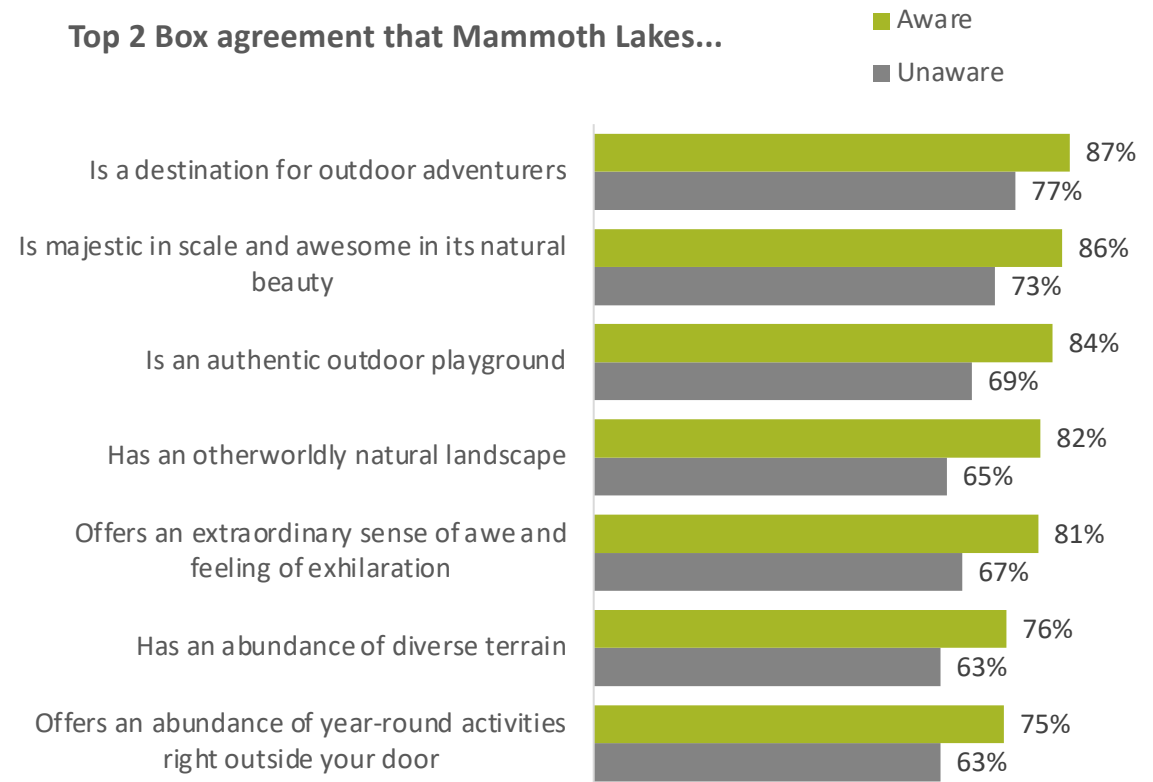
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CA+NV: Impact of the Advertising

Mammoth Lakes Winter
2019-20 Ad Effectiveness
Research

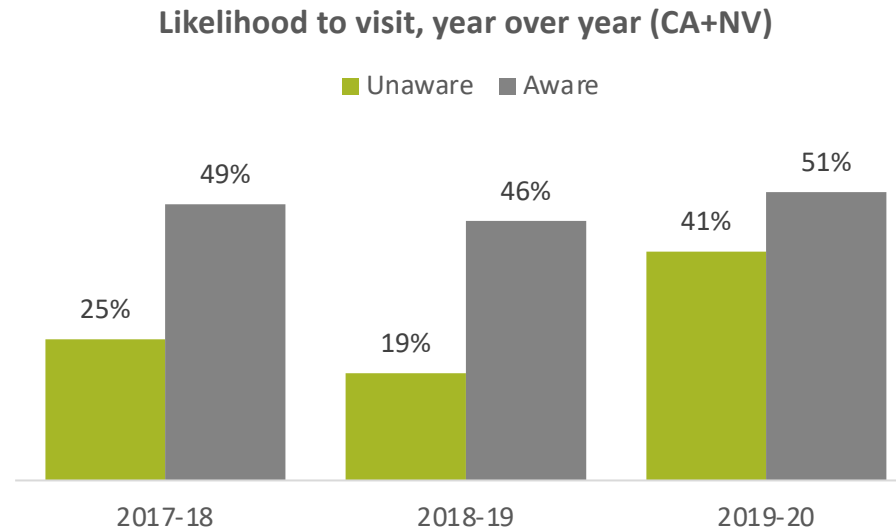
Ads increase positive sentiment among aware travelers in California and Nevada.

- Those aware of MLT advertising showed higher agreement with key brand pillar statements with compared to those unaware.
- There is still opportunity to educate CA/NV on the diversity of terrain and year-round activities Mammoth Lakes has to offer.



Ads generate likelihood to visit Mammoth Lakes.

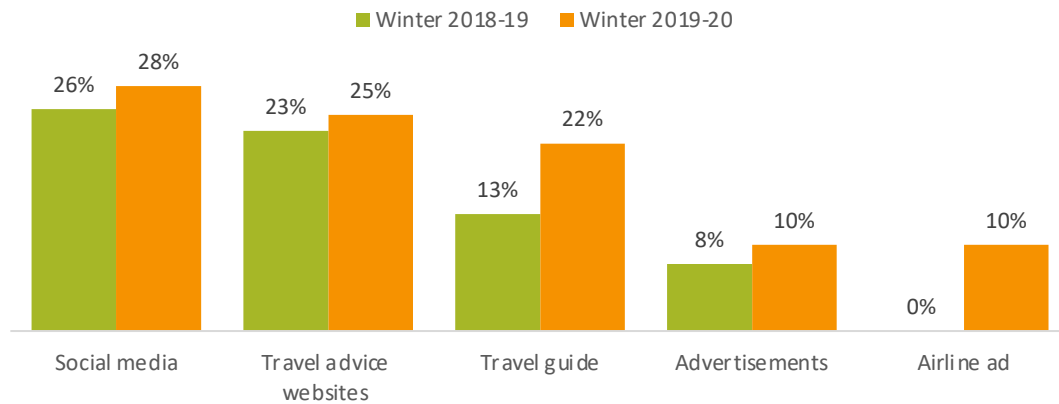
- The ads continue to boost likelihood to visit. This year, likelihood to visit among those aware of the advertising is just over 50%, the highest likelihood measured to date.
- Based on timing of this survey in market, the increase in unaware likelihood to visit is in line with current trends related to COVID-19, with consumers showing greater affinity to visit mountain destinations/outdoors when travel resumes.



Ads motivate MLT website research and use of the visitor guide.

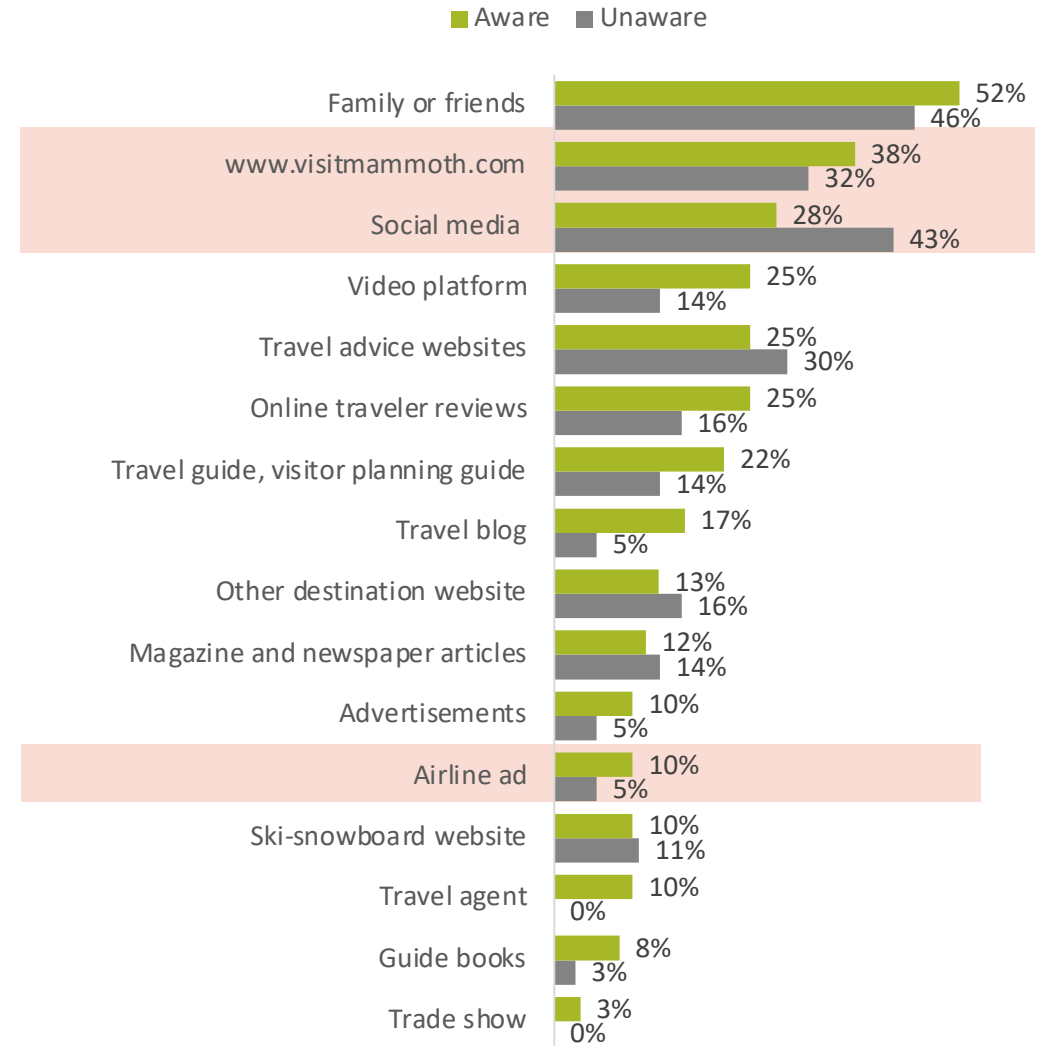
- The MLT website and social media (paid and organic) remain the top resources for planning a trip, just behind friends & family.
- Airline ads grew as a trip planning tool, with 10% of aware audiences using these as a resource.

Usage among ad-aware visitors YOY



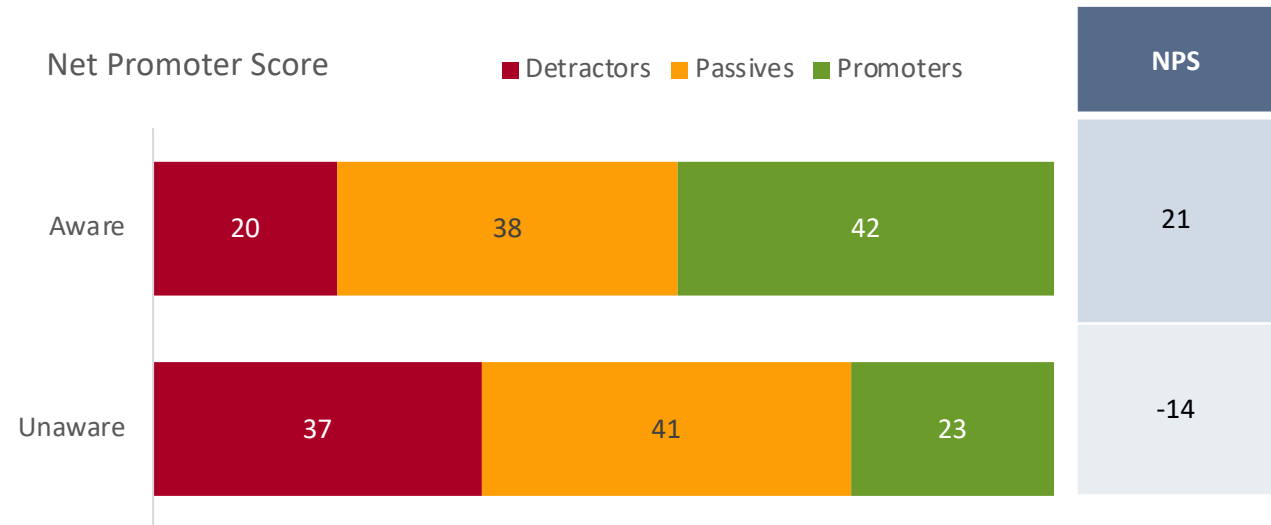
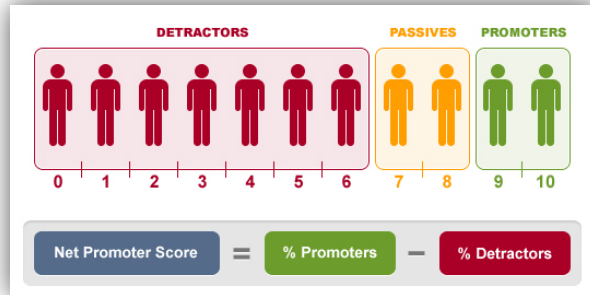
Year over year results are directional only, due to sample sizes. Not all resources asked this winter were asked last year.

Resources used to plan Mammoth Lakes trips



Ad Impact on Net Promoter Score – All Travelers

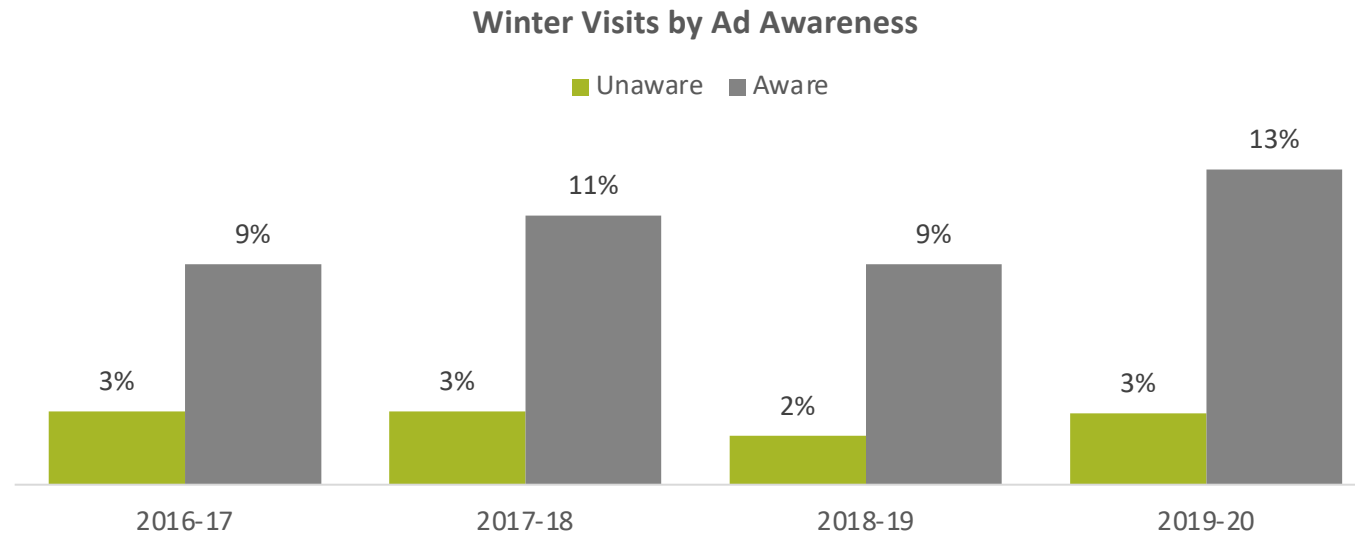
- The ads generate a 35-point increase in the Mammoth Lakes NPS from travelers in California and Nevada.
- For context: in early 2015, when MLT’s ads had been running for about a year in these same markets, the unaware NPS there was -43 and the ads boosted it 46 points.



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

Ads are associated with higher winter visitation.

- The campaign generated winter visits. The 10-point boost illustrates continued growth in ad-influenced winter visitation.



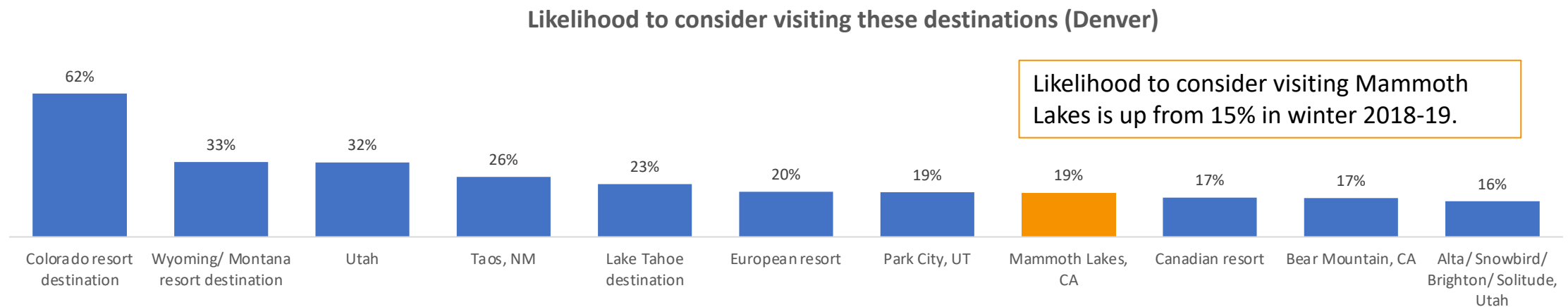
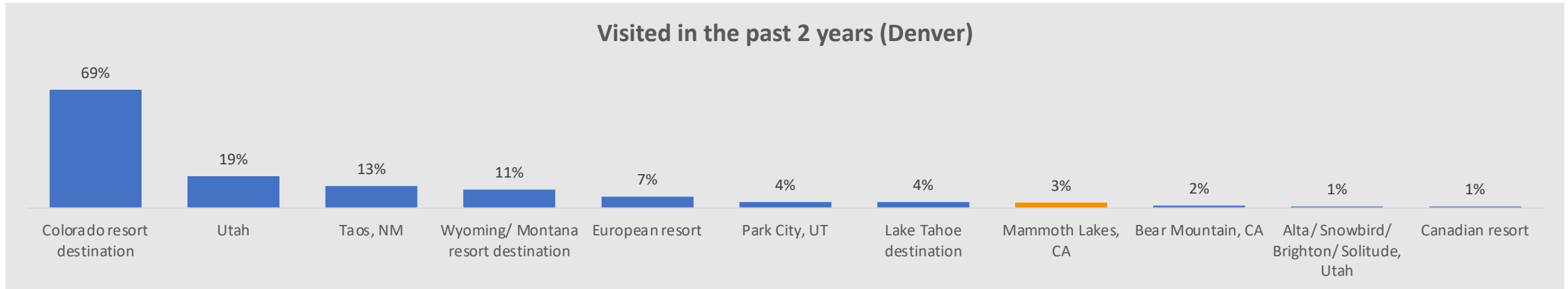
New Market: Denver

Mammoth Lakes Winter
2019-20 Ad Effectiveness
Research

Background & Objectives

- Denver advertising support began in Winter 2018-19 with the addition of Denver flight service via United Airlines. The advertising budget came in just under \$65K and focused on point of sale air service placements.
- This year marked the second year of advertising efforts in the Denver market, with the strategic decision to move CA/NV Winter funds to support growing destination awareness in Denver, as well as continue to support point of sale air service placements, with the objective to continue to grow the Denver market via flight service.

Colorado leads recent visitation and likelihood to consider a visit among Denver travelers. Utah, Wyoming, Montana, and New Mexico lead the second tier of destinations.



There was low snowfall in Mammoth Lakes after early December relative to the rest of the west. After Thanksgiving, the next significant snowfall did not come until March 15, when pandemic closures were beginning.

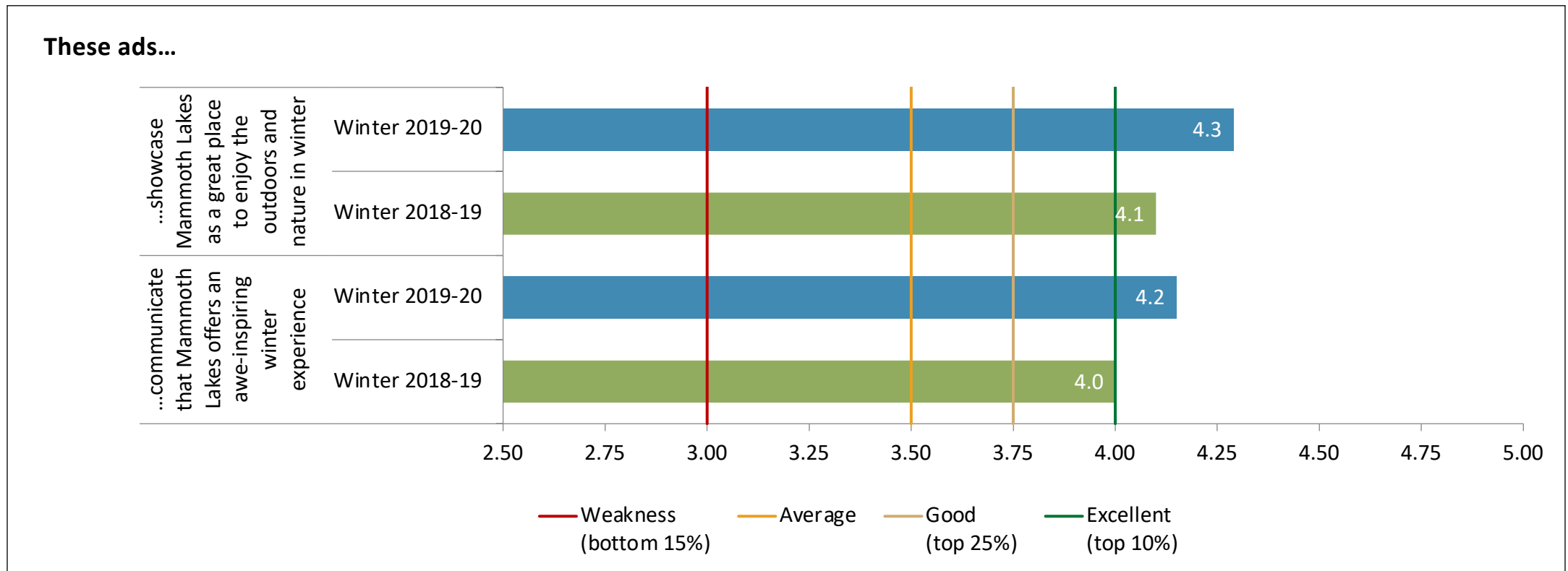
Awareness + Efficiency

- Winter ads reached 27% of the Denver market, which represents growth from the debut campaign. However, this increase cost four times as much as the initial ad investment, leading to a significantly less efficient campaign.
- Some of this could be weather-related, as Denver itself is a winter snow-sport destination. Further, snow came late this spring, after destinations had begun to close due to the Coronavirus. Ad recall could have been eclipsed by those issues.

Denver winter	2018-19	2019-20
Ad spending	\$64,938	\$243,286
Total HH	1,157,570	1,173,874
Awareness	21%	27%
Aware HH	248,878	322,359
CPAH	\$0.26	\$0.75

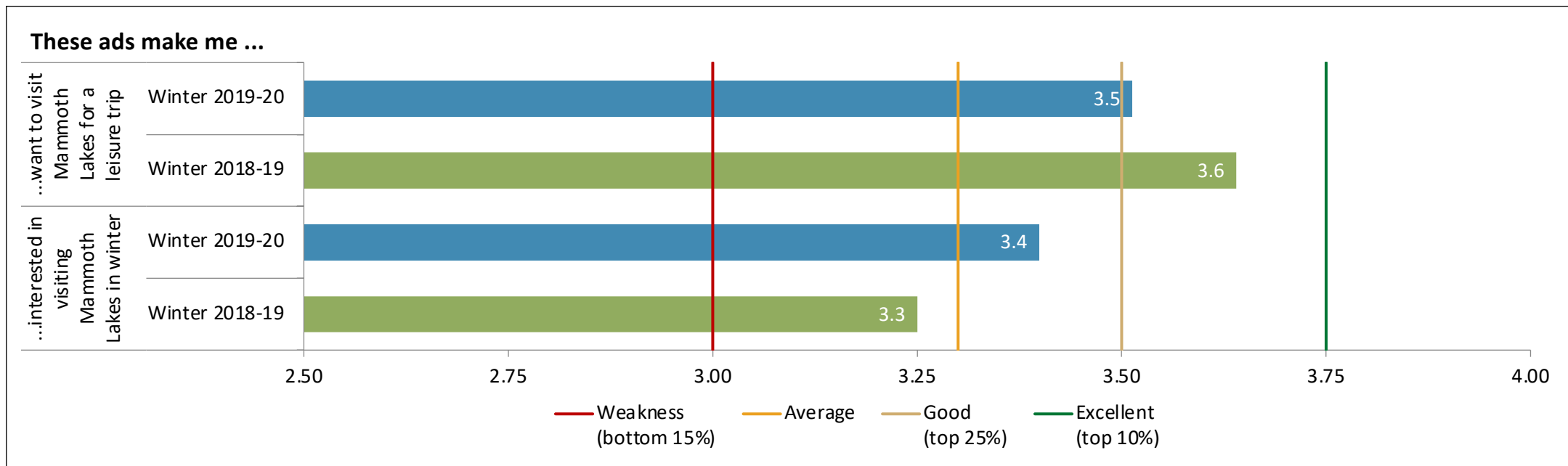
Brand Communication

- 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 ratings are stronger this year than last, pointing to success of expanded campaign efforts.



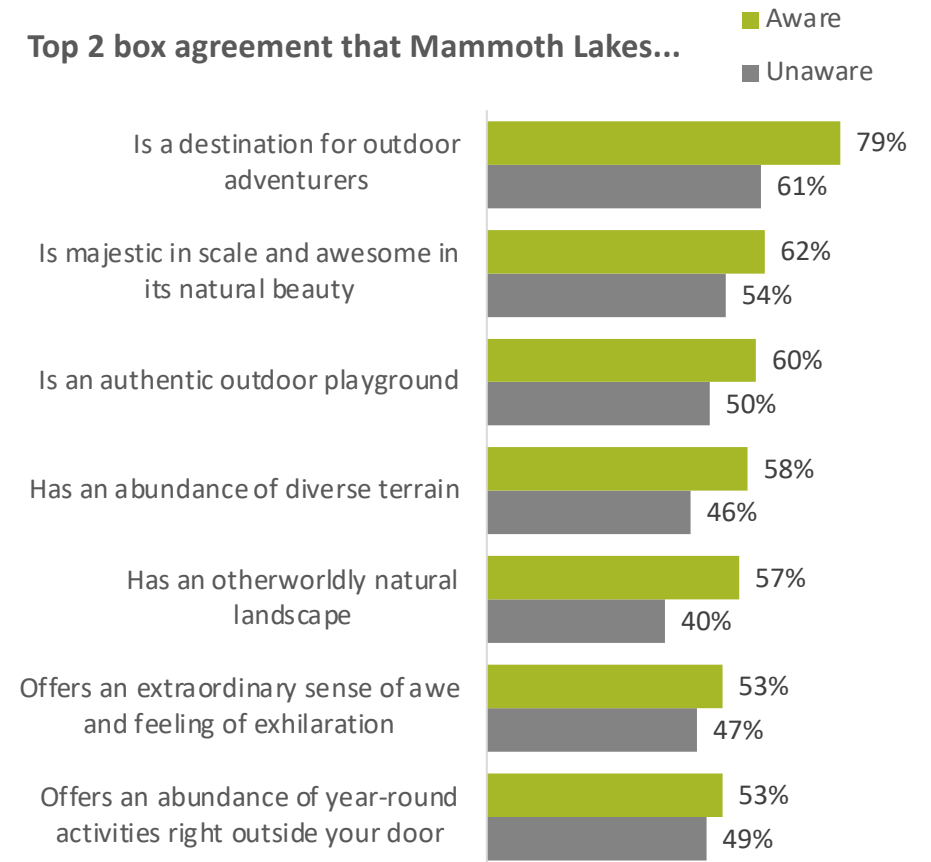
Brand Communication

- The Winter 2019-20 ads continue to build interest in a winter visit among Denver travelers.



Impact of the Advertising

- The strongest association is with Mammoth Lakes as a destination for outdoor adventurers, and this is true of both unaware and aware consumers.
- Among the outdoor assets, Mammoth Lakes is set apart by its diverse terrain and otherworldly natural landscape. This is important since Denver travelers are close to other places that have year-round outdoor assets.
- Continuing to feature topography that is not available elsewhere could be an effective strategy for the Denver market.



Denver Messaging

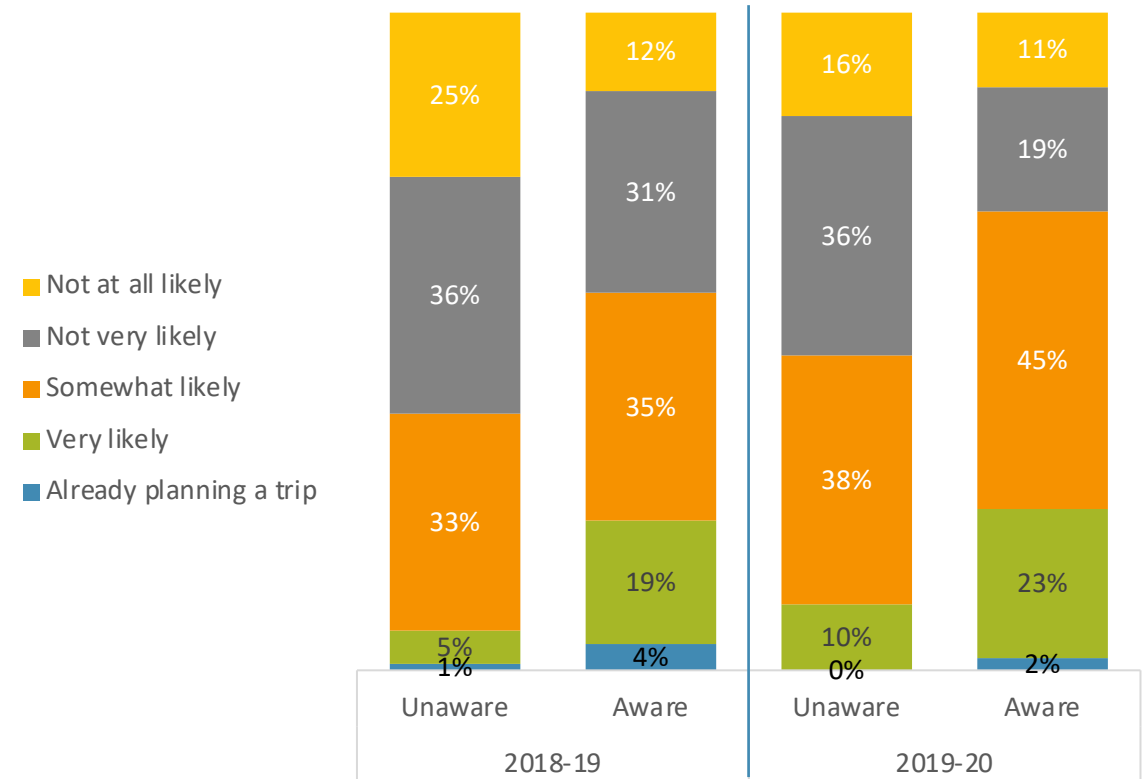
- The shift to more direct ski messaging resonated well with the Denver market and improved the overall communication performance YOY.
- Expanding video content was well-received by Denver consumers, allowing them to see more of the destination and its diverse terrain.

Winter 2018-19 messaging	Winter 2019-20 messaging
Fly to Mammoth Lakes from \$79 one way	Fly nonstop to Mammoth Lakes
Get to the slopes quicker	Sunny skies & bluebird rides! Fly to Mammoth Lakes with daily nonstop flights from DEN.
It's snowing in Mammoth Lakes	Fly to Mammoth Lakes this season and spend more of your vacation on vacation. Great fares and better connections!
This is where family vacations are transformed into the stuff of legends	United Mammoth EARLY WINTER FARE SALE! Fly nonstop from DIA to Mammoth Lakes. Don't scroll past this deal.
Step out of line and off the beaten path. Mammoth Lakes is where winter goes to...	Mammoth Lakes is the ultimate California adventure – majestic natural beauty and a laid-back skiing & snowboarding vibe.
Explore Mammoth Lakes and turn your winter vacation into a legendary...	Check a new experience off your bucket list – Mammoth Lakes has 3,500 acres of skiable terrain & thrills of all sizes.
There are a million ways to explore Mammoth Lakes but you'll have to see it...	Mammoth Lakes is extraordinary, exciting and exceptional. Welcome to where “wow” is a world of its own.
In Mammoth Lakes, the best of winter and summer is a new season called swinter.	Step into the unbelievable.

Impact of the Advertising

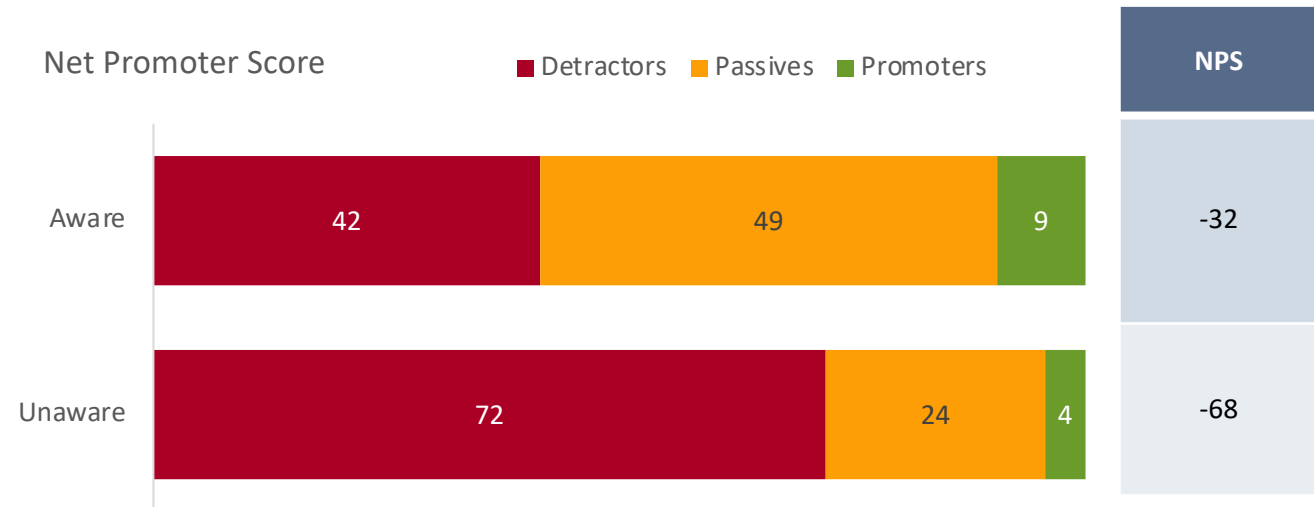
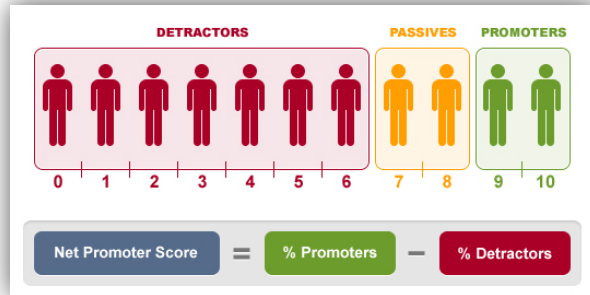
- The unaware level of likelihood to visit Mammoth Lakes in the coming year reflects the uninfluenced response of the Denver market. Year-over-year, the unaware level of intended visitation is similar.
- Among ad-aware Denver consumers, the shares of visit intent are much higher. A muted level of those already planning a trip could be attributable to the current travel restrictions.
- But overall, this result points to the advertising working to build interest among travelers in this market.

Likelihood to visit Mammoth Lakes in the next year (Denver)



Ad Impact on Net Promoter Score – All Travelers

- The ads generate a 36-point increase in the Mammoth Lakes NPS from Denver travelers.
- For context: in early 2015, when MLT's ads had been running for about a year in the California and Nevada markets, the unaware NPS there was -43 and the ads boosted it 46 points.



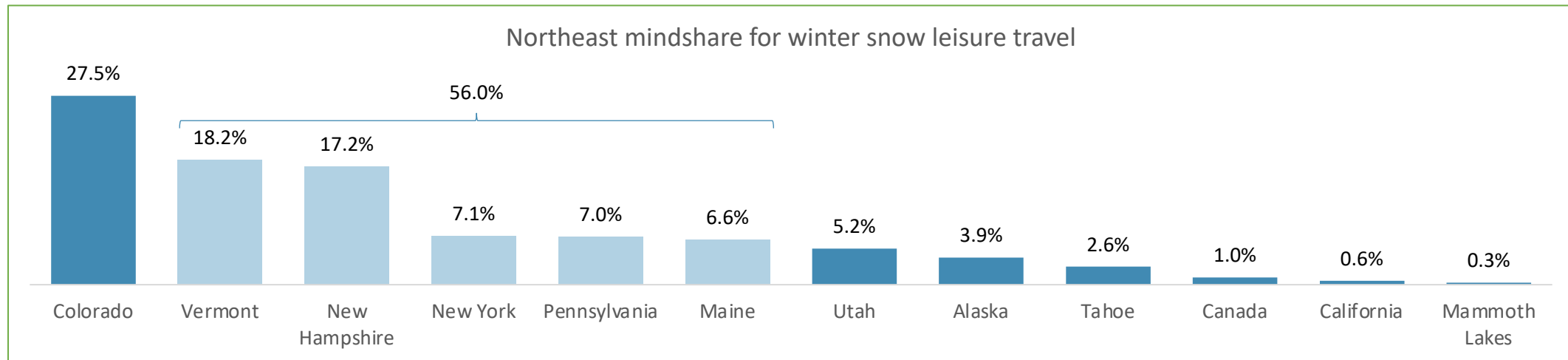
How likely are you to recommend Mammoth Lakes to your friends or family as a destination to visit for a leisure trip?

New Market: Northeast

Mammoth Lakes Winter
2019-20 Ad Effectiveness
Research

Top-Of-Mind Mentions (Mindshare)

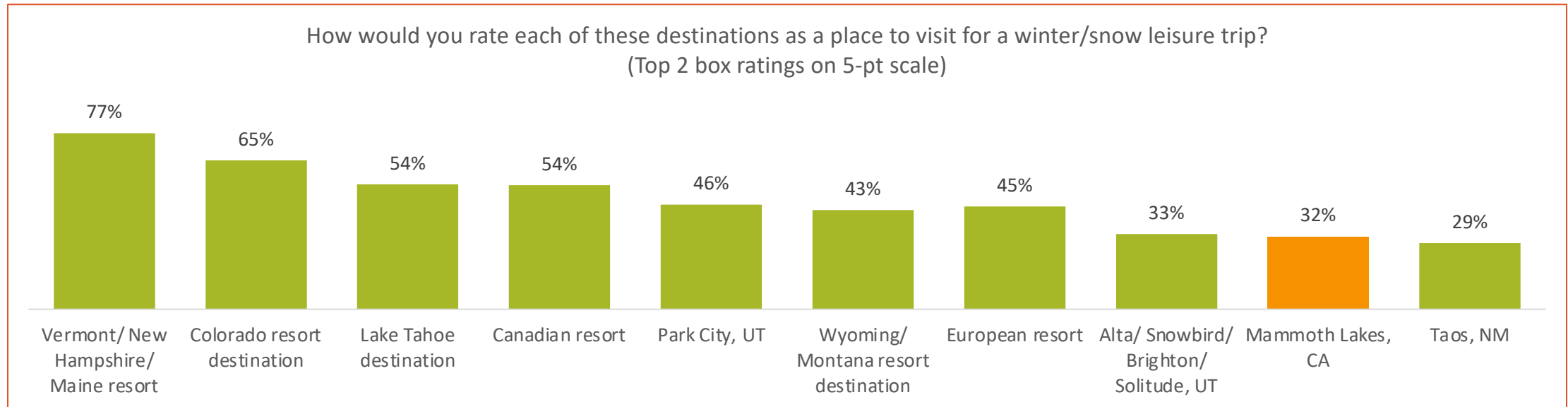
- Prior to exposure to any advertising, outdoor travelers were asked, “If you were thinking about taking a winter/snow leisure trip to a place within the United States with mountains, lakes and an abundance of outdoor activities, where would you go?”
- The results below show that more than a quarter of respondents named Colorado. However, over half of respondents named a northeastern state – Vermont, New Hampshire, New York, Pennsylvania, and/or Maine. MLT’s chief competitors in the northeast are the more proximate ski and snow-sport locales.
- Tahoe got the most mentions of any California destination and is still below 3%. Fewer than 1% mentioned the state of California or other California destinations. It is notable that the respondents that mentioned Mammoth Lakes at this point in the survey were aware of the advertising. No respondents unaware of MLT’s advertising mentioned Mammoth Lakes.
- Mindshare is a slow-moving metric that should be monitored over time. As advertising continues in this market, we would expect to see Mammoth Lakes begin to be mentioned here more.



With the exception of Tahoe, California, and Mammoth Lakes, state responses include mentions of the state as well as specific resort areas. These are coded responses to an open-ended question, and responses representing 2% or more of total answers are coded.

Competitive Landscape – Top-of-Mind Awareness

- Respondent ratings of these destinations reflect higher familiarity and experience with the Northeast, followed by Colorado, just as we saw with top-of-mind mentions. However, it's also noteworthy that Tahoe is well regarded in this market as well; so we know a California destination can make inroads.
- About a third of those familiar enough to rate Mammoth Lakes gave it a rating of 4 or 5 on a 5-point scale. But 60% of respondents said they didn't know enough about Mammoth Lakes to rate it. So at this point, the chief barrier is a lack of awareness.

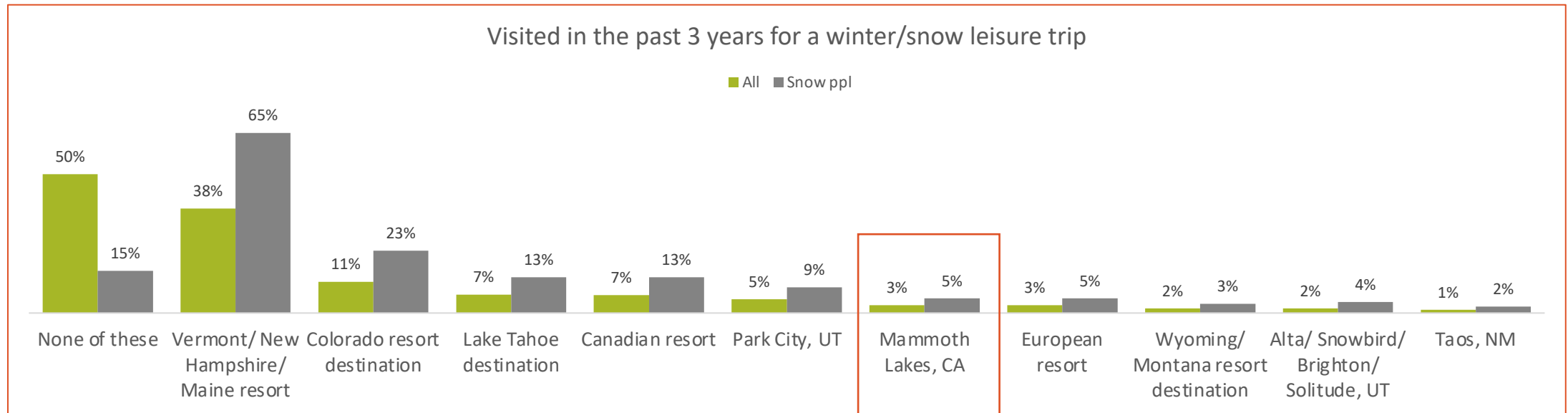


These results are of all travelers, not just snow travelers.

Tahoe's strong position could be a result of being part of the Epic Pass (Heavenly Kirkwood and Northstar) since 2009 and before that part of the American Pass

Competitive Landscape – Past Visitation

- Half of respondents had not visited any of the destinations for a winter/snow leisure trip in the past 3 years, and this underscores the difference between general travelers and snow travelers.
- Snow travelers are defined as having taken a vacation that included snow-sporting or just enjoying winter scenery. Just under half of respondents (44%) are snow travelers.
- Snow travelers have visited all the destinations more frequently than travelers overall have, including Mammoth Lakes.
- Overall, and among snow travelers, recent visitation was most common to Northeast resorts, followed by Colorado. Again, though, Tahoe is among the top destinations, so there could be opportunity for Mammoth Lakes as well. This again underscores that local snow destinations are the chief competitor, and that familiarity and experience are MLT's main barriers.



Tahoe's strong position could be a result of being part of the Epic Pass (Heavenly Kirkwood and Northstar) since 2009 and before that part of the American Pass

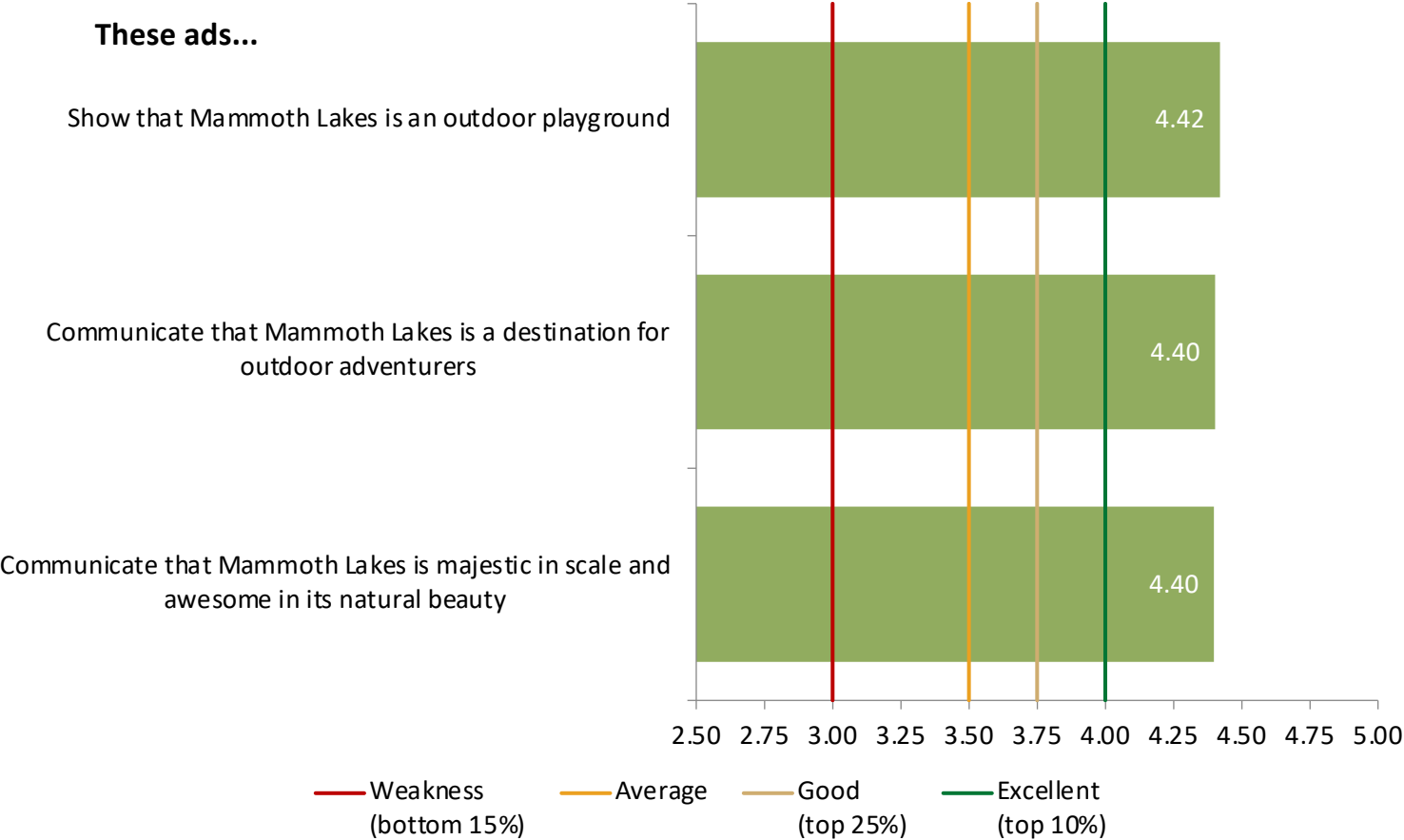
Advertising Awareness + Efficiency

- MLT's advertising campaign was aimed at introducing the destination to the Northeast market. And the first measure of effectiveness is reach – the share of households that recall seeing MLT ads.
- Overall, one third of outdoor traveler households (32%) in the Northeast market recall MLT's winter advertising.
- With under \$300,000 in media investment in this market area, it cost MLT \$0.11 to reach an ad-aware household.
- The average cost to reach an aware household with destination marketing ads is \$0.32, so MLT's Northeast campaign is much more efficient than average.

Northeast winter 2019-20	
Ad spending	\$245,820
HH	6,938,731
Awareness	32%
Aware HH	2,215,402
CPAH	\$0.11

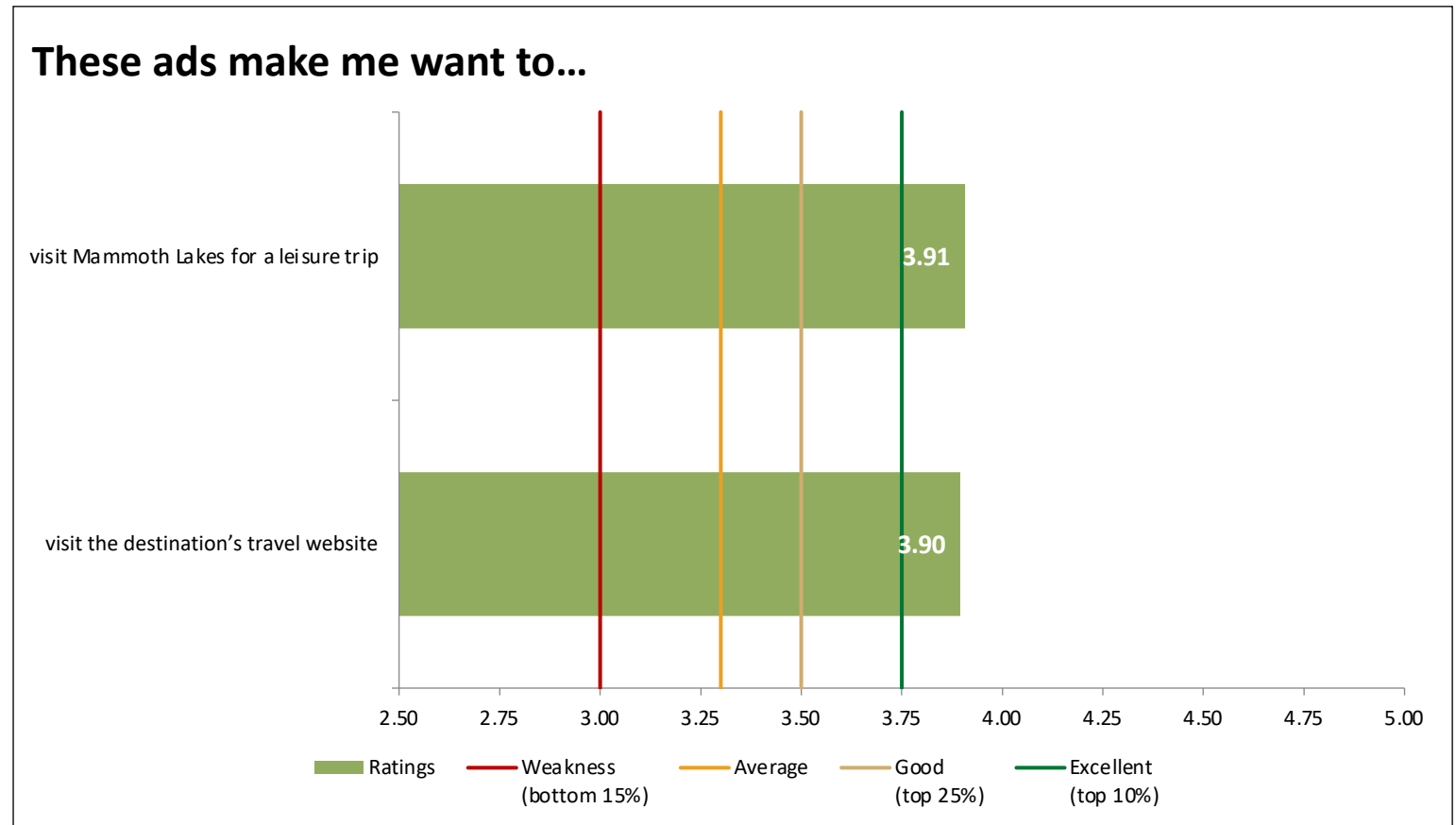
Brand Communication

- Ratings of the ads are excellent for communicating Mammoth Lakes' outdoor assets to travelers in the Northeast market. These ratings are among the strongest destination marketing campaigns SMARInsights has tested.
- **Among snow travelers, these ratings are even higher at 4.5 for each of the attributes shown.**
- 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.



Brand Communication

- Northeast travelers also give MLT's winter campaign excellent ratings for generating interest in a visit. **Among snow travelers, the rating is even higher at 4.2.**
- These attributes are impact ratings, reflecting the ads' influence on behaviors. Behaviors follow perceptions.
- Typically, we would expect to see impact ratings trail communication ratings. But in this case, ratings of both types of attributes are quite high. This indicates that the messaging is relevant to the market.



Ad Impact on Image

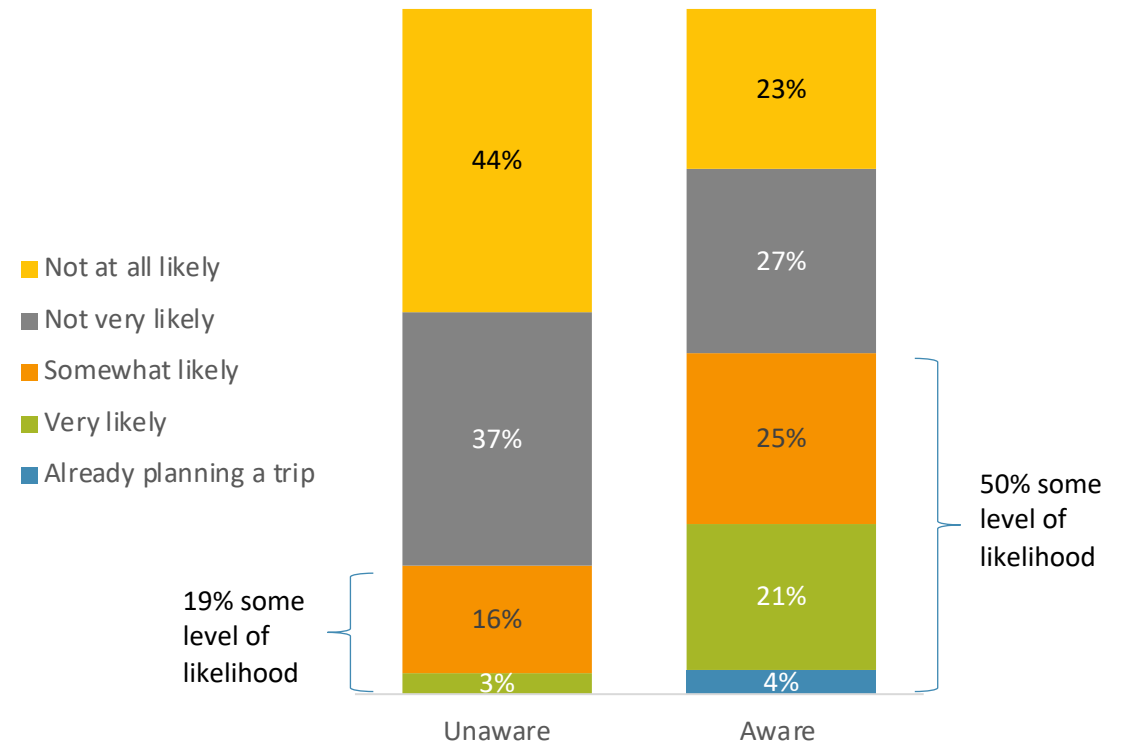
- The ads boosted image evaluations of Mammoth Lakes, particularly in terms of how easy it is to get there and its value.

Mammoth Lakes rated by those who didn't say "Don't Know" when asked to rate it as a leisure destination (n=324)	Unaware	Aware	Diff
Is convenient to get to	3.0	3.5	0.5
Is a good weekend getaway destination	3.4	3.9	0.5
Is a good value for the money	3.4	3.9	0.5
Has beautiful natural scenery	3.9	4.3	0.5
Has activities that are easily accessible once you are there	3.5	4.0	0.5
Is serene and rejuvenating	3.6	4.0	0.4
Inspires adventure	3.7	4.1	0.4
Is a good place to re-energize and recharge	3.7	4.1	0.4
Is a fun place to visit	3.7	4.1	0.4
Is a good place to relax in peace and quiet	3.6	4.0	0.4
Has quality lodging options	3.6	4.0	0.4
Has a "small-town" feel	3.4	3.8	0.4
Has a good variety of restaurants	3.5	3.9	0.4
Is an upscale destination	3.5	3.9	0.4
Is unpretentious and real	3.5	3.9	0.4
Offers a wide variety of outdoor activities	3.7	4.1	0.4
A good place to indulge a passion for the great outdoors	3.7	4.1	0.4
Has an abundance of year-round activities	3.6	3.9	0.4
A place for outdoor adventurers	3.7	4.1	0.4
Has a great climate	3.6	3.9	0.4
Has an abundance of natural terrain	3.8	4.1	0.4
Is an exciting place to visit	3.6	4.0	0.4
Is a good place to go for skiing, snowboarding, and other snow sports	3.7	4.0	0.4
Is a good place for a family vacation	3.7	4.0	0.3
A place with friendly people	3.7	4.0	0.3
An outdoor "playground"	3.5	3.8	0.3
Is invigorating and charged	3.6	3.9	0.3
Is a rugged place	3.6	3.9	0.3

Ad Impact on Visit Intent – Among all Travelers

- MLT’s winter advertising increases likelihood to visit Mammoth Lakes.
- No travelers unaware of the advertising say they are already planning a Mammoth Lakes trip, versus 4% of those aware of the advertising.
- 19% of unaware travelers say they are somewhat or very likely to visit, versus half of ad-aware travelers.
- This is a positive result that points to success of the campaign as advertising continues and wears in with consumers.

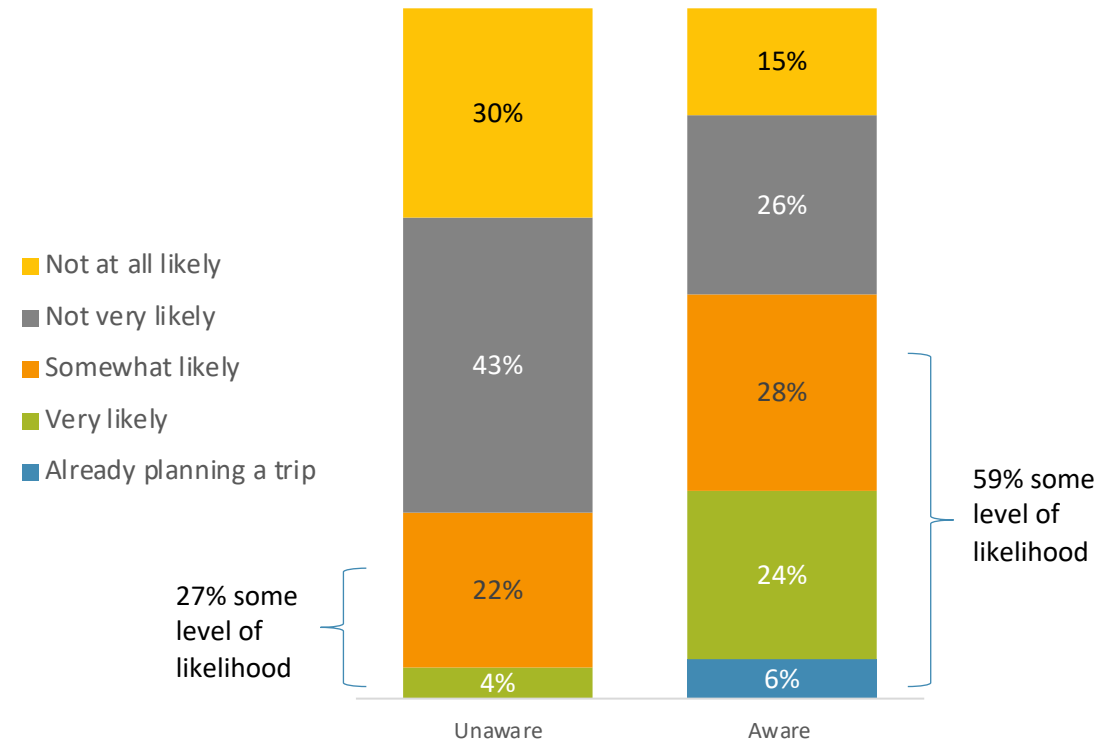
How likely are you to take a leisure trip to Mammoth Lakes in the next year?



Ad Impact on Visit Intent – Among Snow Travelers

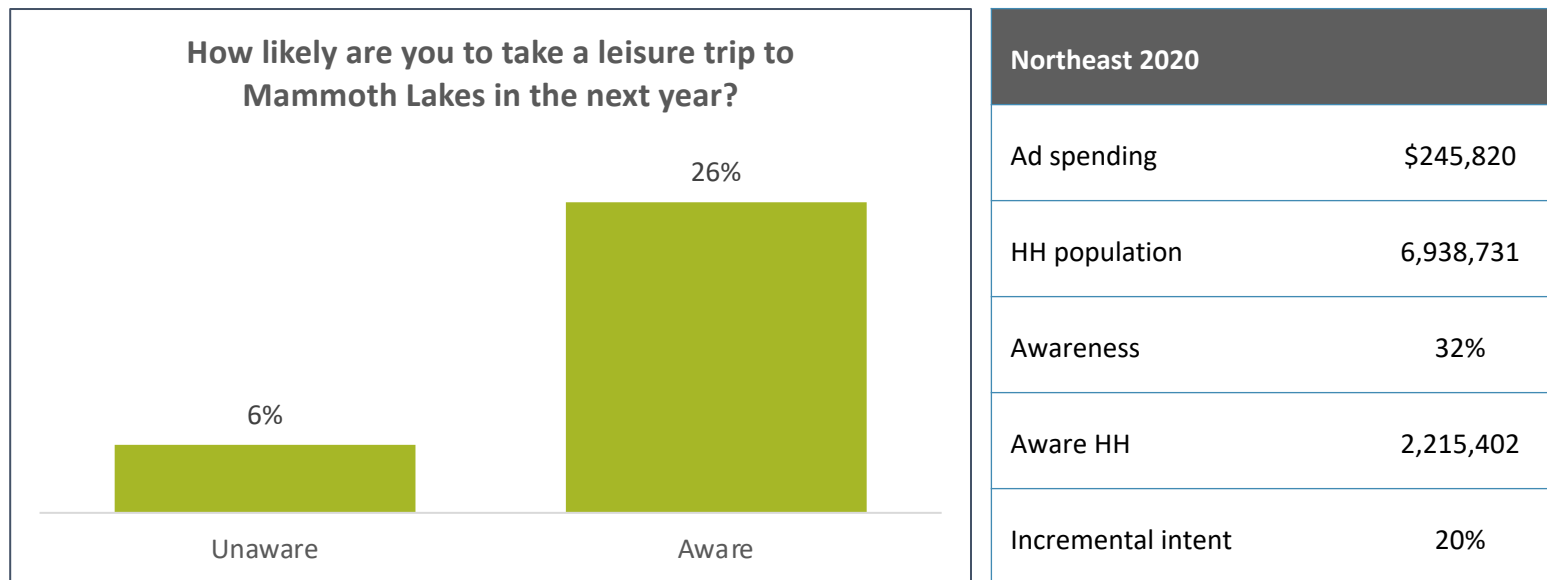
- MLT's advertising doubles the share of Northeast snow travelers who express likelihood to visit – from 27% to 59%.

Snow traveler likelihood to visit MLT in the next year



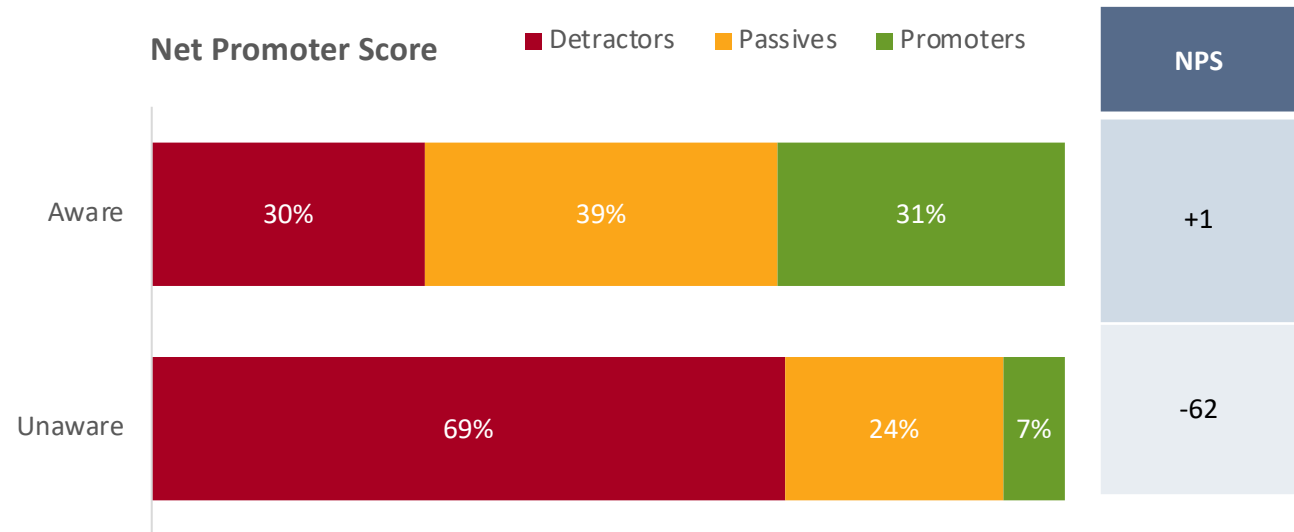
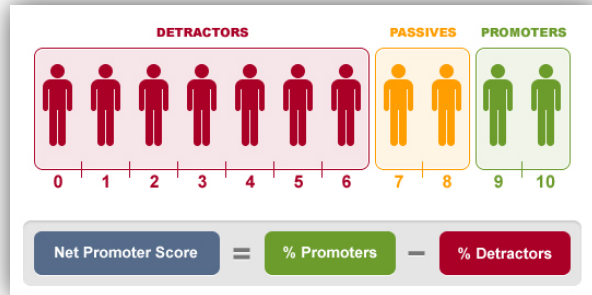
Incremental Potential Trips

- SMARInsights typically calculates a single visit intent number using 100% of those already planning a trip, 80% of those very likely to visit, and 20% of those somewhat likely to visit.
- Applying this calculation to unaware and aware likelihood points to a 20-point lift in visit intent from the Northeast market.



Ad Impact on Net Promoter Score – All Travelers

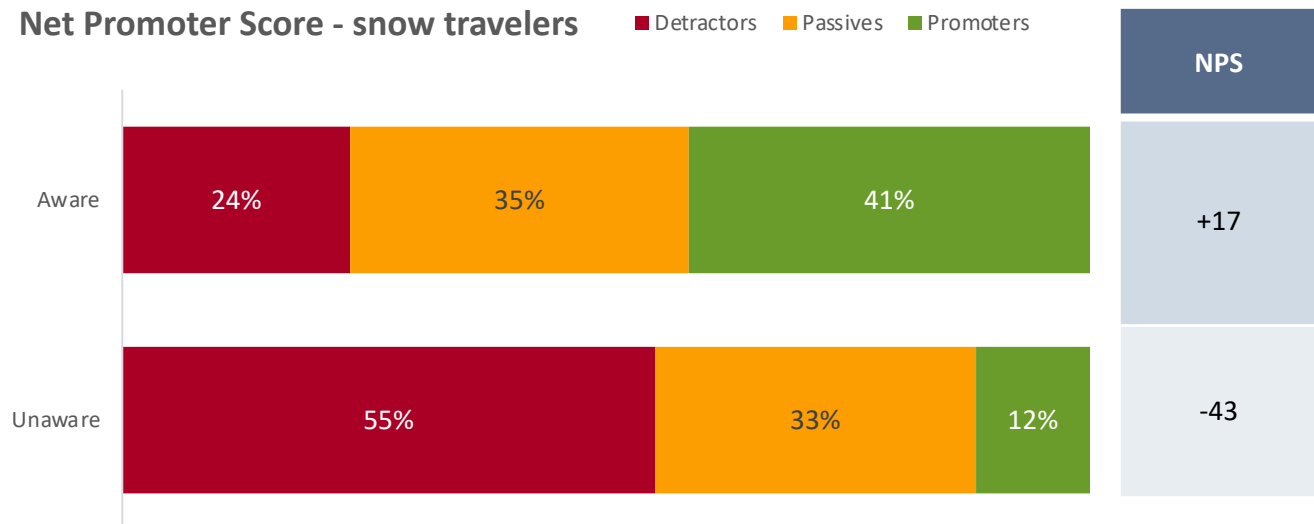
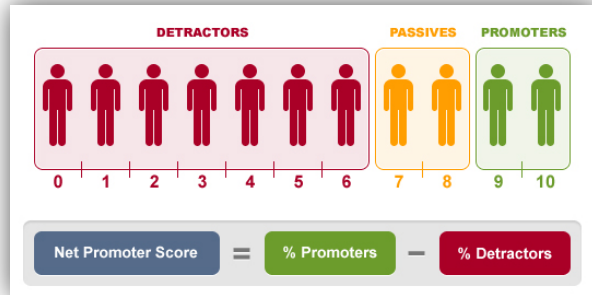
- The ads generate a 63-point increase in the Mammoth Lakes NPS from Northeast market travelers.
- For context: in early 2015, when MLT’s ads had been running for about a year in the California and Nevada markets, the unaware NPS there was -43 and the ads boosted it 46 points.



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

Ad Impact on Net Promoter Score – Snow Travelers

- The ads generate a 60-point increase in the Mammoth Lakes NPS from Northeast market snow travelers.
- It is a positive finding that, even among those unaware of MLT advertising, the Net Promoter Score among snow travelers is higher than it is among travelers overall. The advertising lifts NPS by a similar margin among travelers overall and among snow travelers.



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

Appendix

Mammoth Lakes Winter
2019-20 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 outdoor travelers in California, Nevada, Denver, and the Northeast, with the sample sizes as shown below right.
- Whereas in prior research quotas were set by DMA within California and Nevada, this research let surveys fall out naturally by population. A separate quota was set for Denver.
- Data was weighted to be representative of the population.

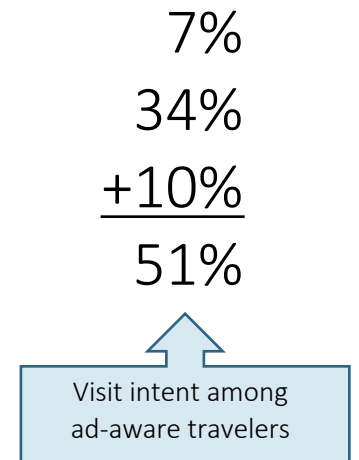
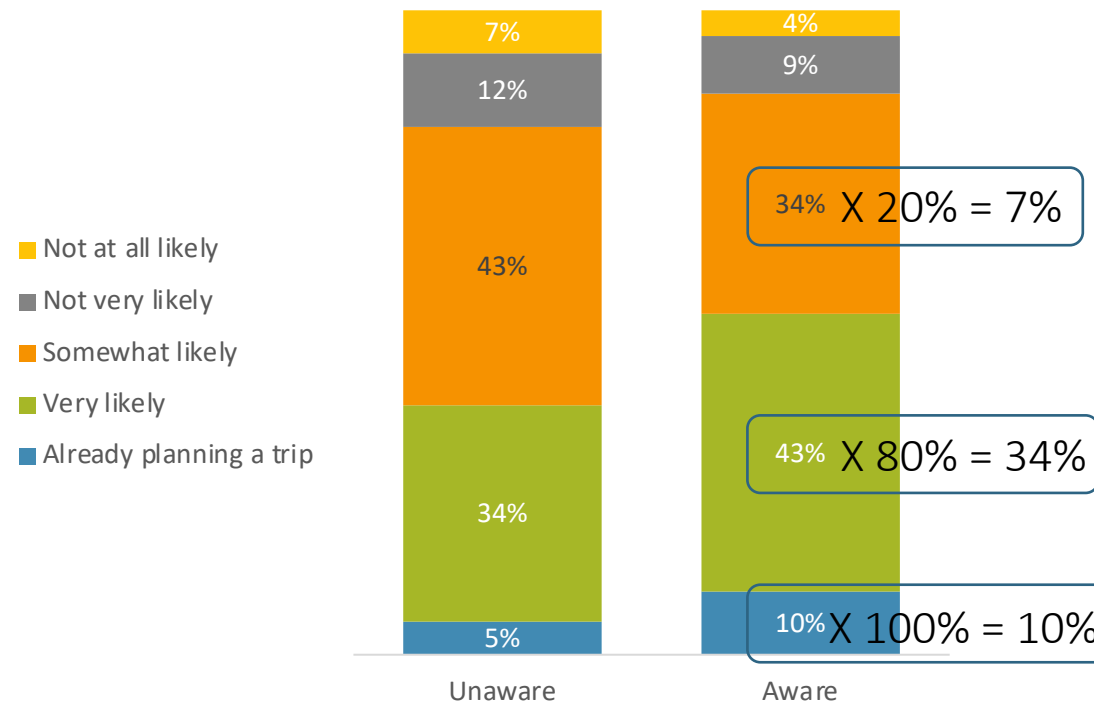
Definitions
<p>Traveling household</p> <ul style="list-style-type: none"> • Households that typically take at least one overnight leisure trip per year
<p>Outdoor travelers</p> <ul style="list-style-type: none"> • Traveling households that: <ul style="list-style-type: none"> • enjoy passive or active outdoor activities and/or • enjoy being outdoors in nature • Population used as the base for this research
<p>Snow travelers</p> <ul style="list-style-type: none"> • 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
<p>Non-snow travelers</p> <ul style="list-style-type: none"> • Outdoor travelers who do not typically take snow vacations

Winter 2019-20	Surveys	Confidence interval at 95% confidence level
California + Nevada	648	3.85%
Denver	200	6.93%
Northeast	756	3.57%
Total	1,604	2.45%

Visit Intent Calculation

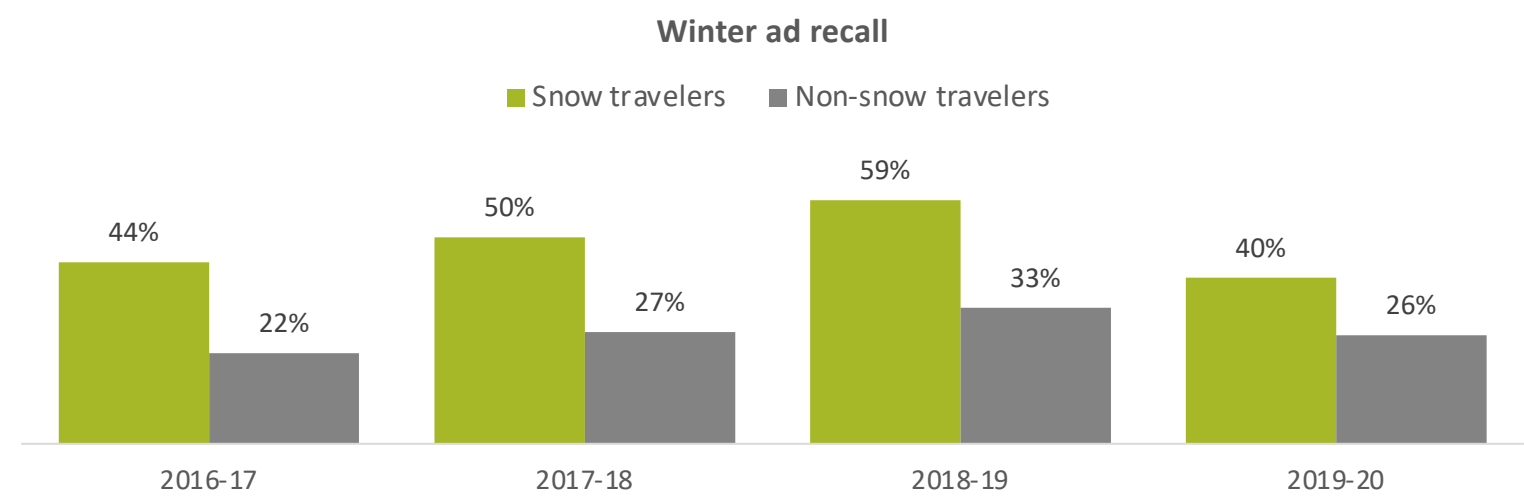
- The visit intent algorithm is one that SMARInsights has developed from years of destination research comparing intent to subsequent actual travel.
- Visit intent is calculated as:
 - 100% of those already planning a trip, plus
 - 80% of those very likely, plus
 - 20% of those somewhat likely to visit

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



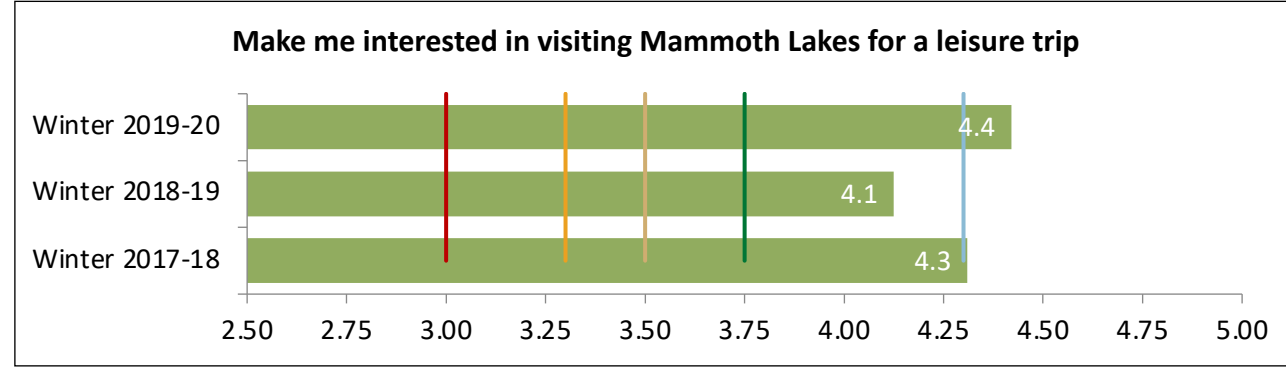
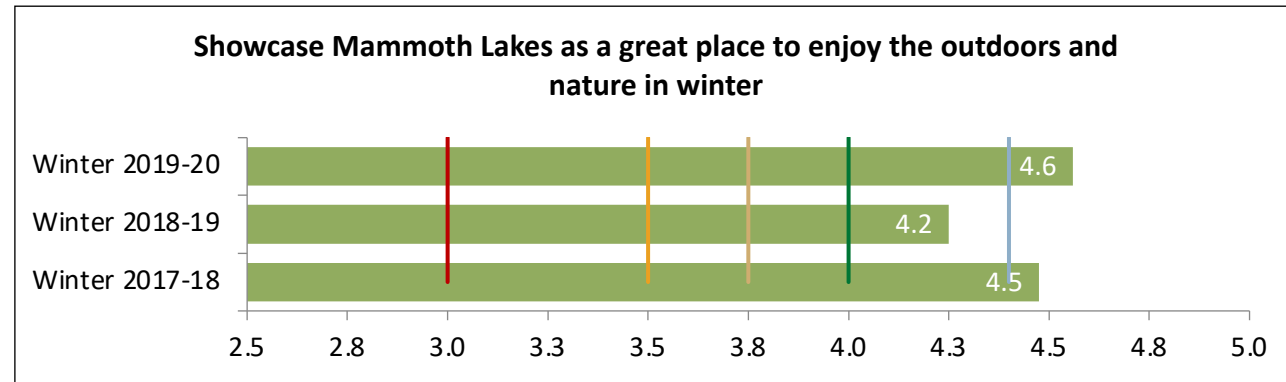
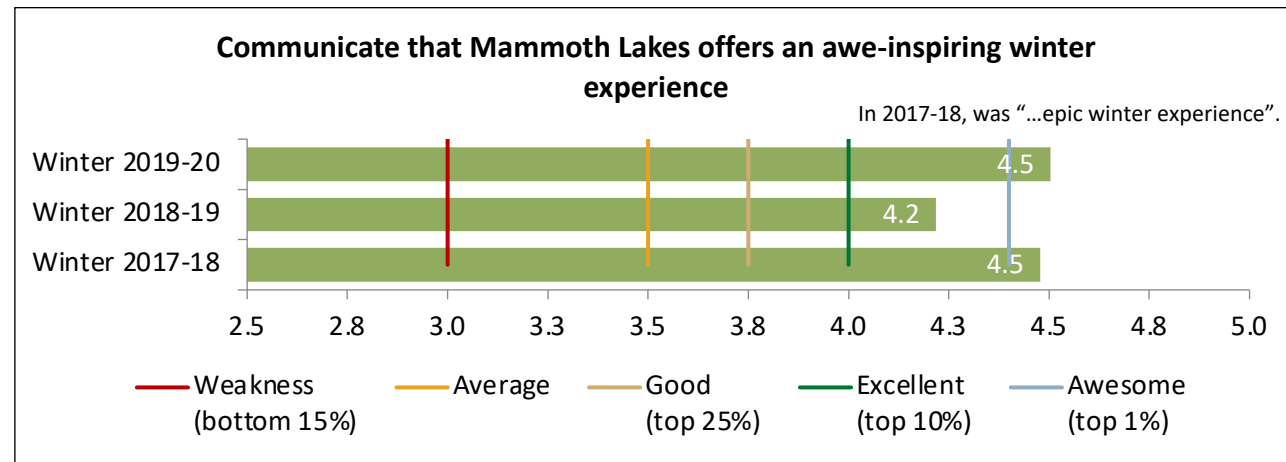
Awareness of MLT winter advertising is growing among snow and non-snow travelers.

- 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 declined, consistent with lower ad spending.



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

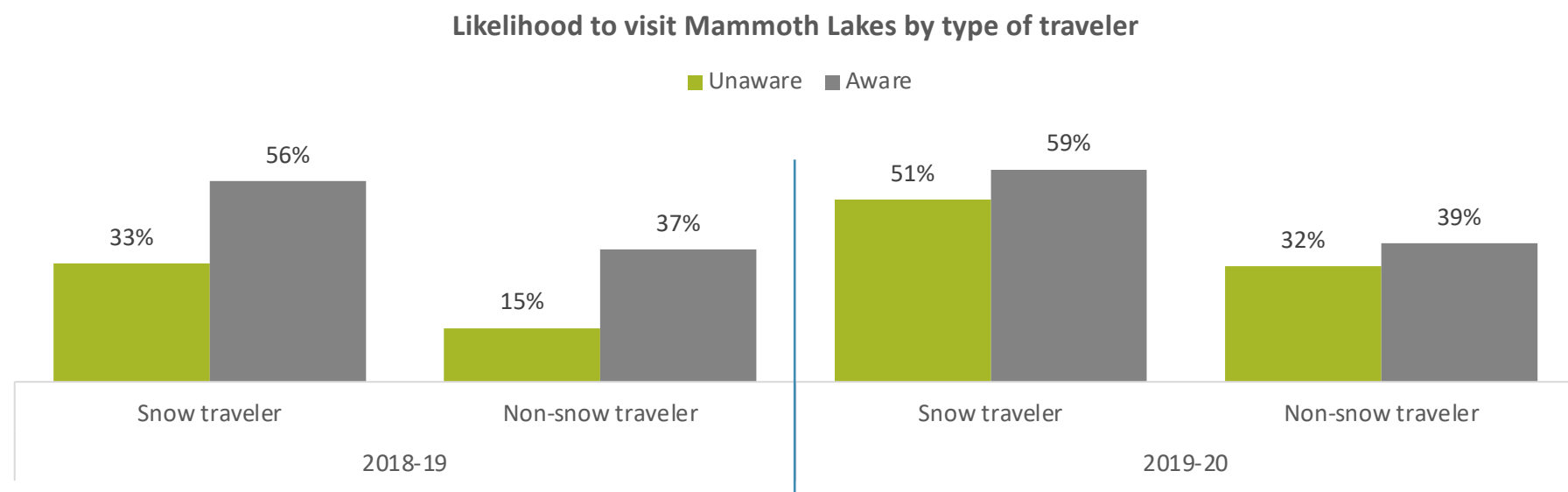
- Snow travelers rate the ads in the top 1% of ads SMARInsights has tested for communicating an awe-inspiring winter experience and showcasing the destination as a great place to enjoy the outdoors, as well as for building interest in a visit.



*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.

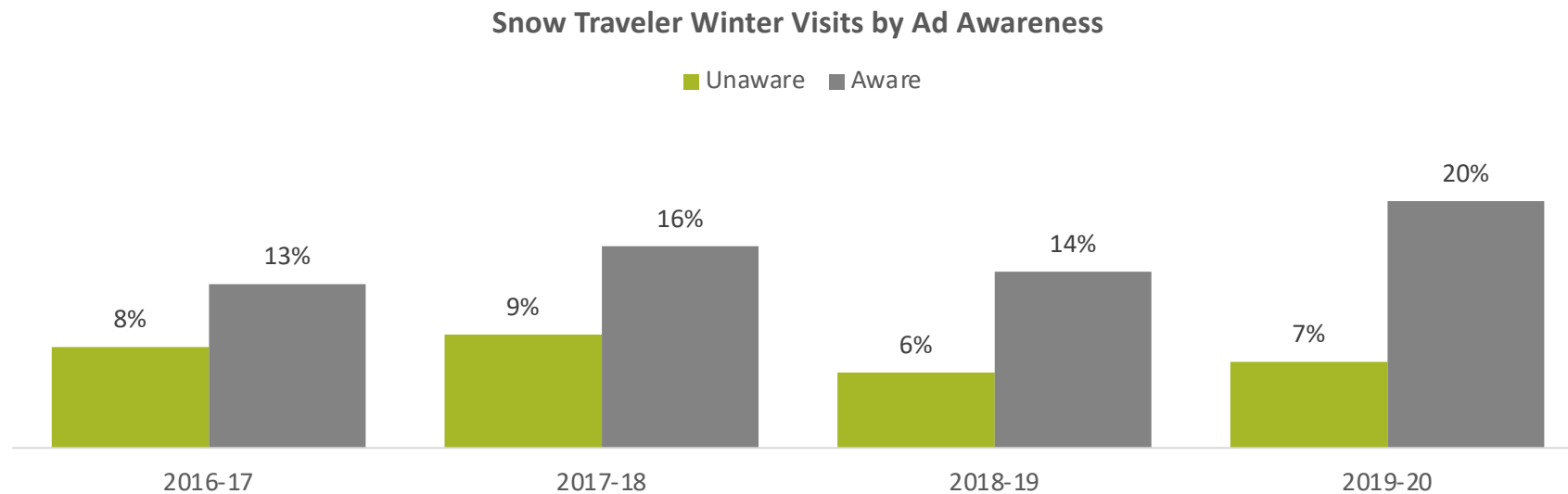
Among snow travelers, more than half of those who recall the ads intend to visit Mammoth Lakes in the coming year.

- The ads generate a lift in visit intent among snow travelers and non-snow travelers, although less of a lift than last winter.
- Baseline (unaware) visit intent is higher among both snow travelers and non-snow. This points to the destination’s broad appeal and suggests that post-recovery travel demand for Mammoth Lakes’ natural outdoor beauty could be heavy.

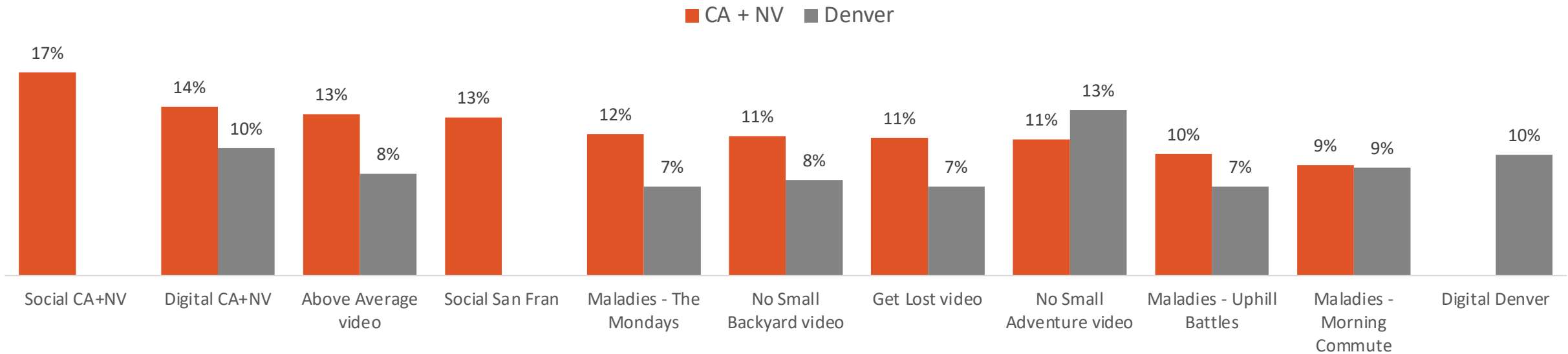


Ads are associated with higher winter visitation.

- The winter ads generated winter visits.
- Among snow travelers, recent winter visitation is in line with prior years, while aware visitation is higher. The ads are continuing to build interest and influence visitation, even though they reached fewer travelers this winter.



Awareness of Individual Winter Ads



CA + NV Snow Traveler Demographics

	Winter 2018-19		Winter 2019-20	
	Snow traveler	Non-snow	Snow traveler	Non-snow
18-34	41%	21%	39%	22%
35-54	37%	31%	36%	32%
55+	22%	48%	25%	47%
Married	53%	53%	52%	53%
Single/Never married	33%	29%	39%	32%
High school or less	9%	11%	5%	9%
Some college/technical school	25%	28%	22%	25%
College graduate	46%	37%	52%	47%
Post-graduate degree	20%	24%	20%	19%
Kids in HH	35%	20%	34%	24%
Under \$75K	47%	49%	42%	52%
\$75-\$149K	35%	35%	40%	37%
\$150-\$299K	14%	13%	16%	10%
\$300K+	4%	3%	2%	2%

Northeast Markets – Competitive Landscape

- A very small share of travelers had visited Mammoth Lakes, but those who had give it very high ratings.
- These results should be viewed with care, as only 19 respondents rated Mammoth Lakes, versus nearly 300 who rated Vermont/New Hampshire/Maine.
- But the data suggest, directionally, that advertising can be used to answer the lack of information that many travelers have about Mammoth Lakes.

Destinations rated by those who visited in the past 3 years (Base is all travelers, not just snow people)	Mammoth Lakes	Lake Tahoe destination	Colorado resort destination	Park City, UT	Wyoming/Montana resort destination	Alta/Snowbird/Brighton/Solitude, UT	Vermont/New Hampshire/Maine resort	Taos, NM	Canadian resort	European resort
An outdoor “playground”	4.3	3.9	4.1	4.1	3.9	3.6	4.2	3.7	3.8	3.6
A place for outdoor adventurers	4.5	4.0	4.4	4.2	4.2	3.7	4.4	3.8	4.0	3.8
A good place to indulge a passion for the great outdoors	4.5	4.0	4.4	4.3	4.1	3.7	4.4	3.8	3.8	4.0
Offers a wide variety of outdoor activities	4.5	4.1	4.2	4.2	4.1	3.5	4.4	4.0	3.9	3.9
Has a “small-town” feel	4.2	3.5	3.7	3.8	3.8	3.5	4.4	3.4	3.5	3.5
Is invigorating and charged	4.3	3.8	4.1	4.0	4.0	3.6	4.1	3.8	3.8	3.7
Is a good place to re-energize and recharge	4.4	3.9	4.1	4.2	3.9	3.7	4.2	3.7	3.9	3.8
Is serene and rejuvenating	4.2	3.9	4.1	4.0	4.0	3.5	4.2	3.9	3.9	3.9
Is a good place to relax in peace and quiet	4.2	3.9	4.2	4.0	4.1	3.7	4.3	3.8	3.8	3.9
A place with friendly people	4.4	3.8	4.1	4.2	3.9	3.5	4.3	3.6	4.0	3.9
Is unpretentious and real	4.2	3.6	3.8	4.0	4.0	3.8	4.3	3.8	3.7	3.5
Has beautiful natural scenery	4.6	4.3	4.5	4.2	4.4	3.7	4.5	4.1	4.1	4.1
Has an abundance of natural terrain	4.4	4.1	4.4	4.2	4.1	3.7	4.4	4.0	4.0	3.9
Inspires adventure	4.5	4.0	4.2	4.1	4.1	3.6	4.2	3.8	3.9	3.9
Is a rugged place	3.9	3.6	3.7	3.8	3.9	3.4	3.9	3.8	3.5	3.4
Is a fun place to visit	4.5	4.1	4.3	4.2	3.9	3.7	4.3	3.8	3.9	4.0
Is an exciting place to visit	4.5	4.0	4.3	4.0	4.1	3.5	4.1	3.7	4.0	4.0
Is convenient to get to	3.9	3.4	3.5	3.3	3.0	3.2	4.2	3.2	3.4	2.6
Has a great climate	4.3	4.0	4.0	3.9	3.7	3.5	3.9	3.8	3.7	3.7
Is a good place for a family vacation	4.4	4.0	4.2	4.1	4.0	3.7	4.4	3.9	4.0	3.7
Is a good value for the money	4.4	3.6	3.8	3.6	3.6	3.4	4.1	3.6	3.6	3.5
Has quality lodging options	4.2	4.0	4.2	4.1	3.9	3.5	4.2	4.1	4.1	4.0
Is a good value	4.4	3.7	3.8	3.7	3.6	3.7	4.1	3.4	3.8	3.5
Has a good variety of restaurants	4.3	3.8	4.0	4.0	3.8	3.4	3.9	3.8	3.7	3.9
Has activities that are easily accessible once you are there	4.3	3.9	4.0	4.0	3.8	3.5	4.1	3.8	3.9	3.8
Is an upscale destination	4.2	3.7	4.1	3.9	3.8	3.3	3.5	3.6	3.6	3.9
Has an abundance of year-round activities	4.3	3.8	4.0	4.0	3.9	3.2	4.2	3.5	3.8	3.9
Is a good weekend getaway destination	4.3	3.5	3.8	3.7	3.3	3.4	4.4	3.4	3.6	2.9
Is a good place to go for skiing, snowboarding, and other snow sports	4.3	4.0	4.5	4.2	4.0	3.8	4.4	3.7	4.0	3.9

Questionnaire – CA+NV

Mammoth Lakes, California (Mering)
Winter 2019-20 Ad Effectiveness – CA+NV and Denver markets
4-13-2020 final

[COMPETITIVE SET]
Mammoth Lakes, CA
Colorado resort destination
Bear Mountain, CA
Lake Tahoe destination
Utah
Park City, UT
Wyoming/Montana resort destination
Alta/Snowbird/Brighton/Solitude, Utah
Taos, NM
Canadian resort
European resort

ZIP. What is your ZIP code? _____

S1. 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, 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 SCREENING QUESTIONS]

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

1. 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? _____

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2. Have you visited Mammoth Lakes, California, in the last year for a leisure trip?
 Yes
 No → [AFTER SCREENERS, SKIP TO Q13A]

2ax. 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 & Q2=NO & Q2A=NO FOR WINTER, SPRING, SUMMER, & FALL]

[END OF SCREENERS]
COMPETITIVE SET QUESTIONS

S4. How much do you know about each of the following destinations?

[ROTATE]	I've never heard of this destination	I've heard the name, but know little/nothing about this destination	I know a little about this destination	I know a fair amount about this destination	I know a lot about this destination
[INSERT COMPETITIVE SET]					

S5. How likely are you to consider visiting each of these destinations?

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

S6. [ASK FOR DESTINATIONS WHERE S5=SOMEWHAT OR VERY LIKELY OR ALREADY PLANNING A TRIP] When are you most likely to visit each of these destinations? Please select only one for each destination.

[ROTATE]	Spring (April – June)	Summer (July – August)	Fall (September – November)	Winter (December – March)
[INSERT COMPETITIVE SET WHERE S5>2]				

[ROTATE]	S7. Which have you visited in the last 2 years for a leisure trip? Select all that apply.	S8. [IF S7=YES] How many times have you visited in the last 2 years?
[INSERT COMPETITIVE SET]	[INCLUDE 'NONE OF THESE' OPTION]	

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- 2 -

VISITATION

2a. When during the following months did you travel to Mammoth Lakes for a leisure trip? [SHOW MONTHS JULY 2019-JUNE 2020; ADD MONTHS AS THEY OCCUR BASED ON WHEN SURVEYING TAKES PLACE]

[NOTE TO PROGRAMMER: NEED TO UPDATE SCRIPT TO GET CORRECT MONTHS TO SHOW...USING WAVE= VARIABLE]

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

Select all that apply.

3X. You mentioned that you traveled to Mammoth Lakes [SHOW FIRST MONTH SELECTED]. Was this your first time visiting Mammoth Lakes?
 YES/NO

Now we would like to ask you a few questions about your [MONTH YEAR] trip.

3B. Which days of the week were you in Mammoth Lakes on this trip? Please select all that apply. [ASK FOR ALL TRIPS]

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]. [ONLY ASKING ABOUT 1 TRIP]

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? _____

6A. How did you travel to Mammoth Lakes for this trip?

- Flew
- Drove

6B. 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]

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- 3 -

Questionnaire – CA+NV

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

- 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 [ASK ONLY FOR NON-WINTER TRIPS]
- In other paid accommodations

8. [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/Airbnb/house)
- Hotel/motel
- RV park/campground [ASK ONLY FOR NON-WINTER TRIPS]
- Other paid accommodations

9_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

9. Which of the following activities did you participate in during your [MONTH YEAR] trip? Select all that apply. [LIST INSERTED FROM MAMM124] [ROTATE]

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

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Gondola rides
Visiting geological formations unique to the area
Fall colors [ASK ONLY IF TRIP IS SEPT – NOV]
Sightseeing
Viewing mountains, lakes, etc.
Other, specify _____
Outdoor Activities
Hiking
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]

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9_1. [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.

9A. Thinking about your overall experience in Mammoth Lakes, would you say it was...?

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

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.

9B. 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

10d. 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

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Questionnaire – CA+NV

[ASK ALL]

13A. [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					

14. 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	

15. 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]

Brand video [FROM MAMM129]

No Small Adventure_Brand 30_YTTrueViewFB.MP4



Vimeo # - 366771381

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Social videos [INSERTED FROM MAMM130]

IA\Questionnaires\Mammoth Lakes\FY 19-20

YouTube_TrueView Mammoth_Brand_Find Flights_V2_Button.mp4 # 392966137	Video1 No_Small_Backyard_High_Places.mp4 # 392967675	Video2 MAM_NSB_Above_Average_FINAL.mp4 # 392969065	Video3 No_Small_Backyard_Get_Lost.mp4 # 392969641

Maladies

THE_MONDAYS_FINAL.mp4 VIMEO - #408116368	THE_MORNING_COMMUTE_FINAL.mp4 VIMEO - #408117659	UPHILL_BATTLES_FINAL.mp4 VIMEO - #408118419

Ad1. [ASK AFTER EACH AD] Do you recall seeing this video or one like it for Mammoth Lakes, California?

Yes
No

Ad2. [ASK AFTER AD] What is your reaction to this ad?

Positive
Negative
Neutral

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

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DIGITAL ADS
ASK NV/CA ONLY

CA NV 1.png	CA NV 3.png	CA NV 4.png
CA NV 5.png	CA NV 6.png	CA NV 12.png
CA NV 10.png	CA NV 13.png	CA NV 15.png

ASK DENVER ONLY

Denver 1.png	Denver 2.png	Denver 3.png

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Questionnaire – CA+NV

Denver_5.png Denver_6.png Denver_7.png

Denver_9.png Denver_10.png

ASK SANFRAN ONLY

SF_3.png SF_10.png SF_12.png

ASK ALL

Display_1.png Display_5.png

Matador_1.png

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

- Yes
- No

Ad2. [ASK AFTER EACH AD] 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? _____

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					

GRIDa. [AFTER SHOWING ALL ADS, ASK] Thinking about all of the summer and fall 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					

SOCIALFU. [ASK AFTER ALL ADS] Other than the ads you just saw, have you seen Mammoth Lakes mentioned in any social media?

- Yes
- No

WEBSITE.

ASK ALL: airtservice.JPG CA/NV ONLY: CA NV website.JPG

Questionnaire – CA+NV



Have you visited this website recently? YES/NO

GUIDE. [SHOW COVER OF 2019 AND 2020 VISITOR GUIDES] Have you used either of these Visitor Guides? YES/NO



I:\Questionnaires\Mammoth Lakes\2019 visitor guide.png



I:\Ads Master\Mammoth Lakes\NE markets winter 2019-20\2020 Visitor Guide.png

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

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

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

- Facebook
- Instagram
- Twitter
- Pinterest
- TikTok
- Other

Do not follow Mammoth Lakes Tourism on any social channels

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Corona1. How has/will the coronavirus pandemic influence your vacation plans? Select all that apply.

SHOW IN THIS ORDER
I canceled an already-booked vacation to Mammoth Lakes
I chose not to book a vacation to Mammoth Lakes
I am holding off on planning or booking a vacation to Mammoth Lakes
I canceled another already-booked vacation
I chose not to book another vacation
I am holding off on planning or booking another vacation
None of these

Corona1A. [ASK IF HAVE CANCELED MAMMOTH LAKES VACATION] When was/were the leisure trip(s) planned that you have cancelled? Select all that apply

- March 2020
- April 2020
- May 2020
- June 2020
- July 2020
- August 2020
- September 2020
- October 2020
- November 2020
- December 2020
- After December 2020

DEMOS

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

marital. Are you...?

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

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

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

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

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

- African American
- Asian American
- Caucasian
- Hispanic/Latin American
- Mixed ethnicity
- Native American
- Other

gender. Do you identify as...

- Male
- Female
- Other
- Prefer not to answer

PPinHH. Including you, how many people are currently living in your household? ____ [IF 1, GO TO D3a]

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

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

- 0-4 years of age
- 5-12 years of age
- 13-18 years of age

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Questionnaire – Northeast

Mammoth Lakes, California (Mering Carson)
Northeast Markets 2019-20 Ad Awareness and Visit Intent Questionnaire

COMPETITIVE SET
Mammoth Lakes, CA
Lake Tahoe destination
Colorado resort destination
Park City, UT
Wyoming/Montana resort destination
Alta/Snowbird/Brighton/Solitude, UT
Vermont/New Hampshire/Main resort
Taos, NM
Canadian resort
European resort

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 AT END OF SCREENERS]

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 normally take at least one leisure trip per year where I travel by air		
I regularly use social media such as Facebook, Twitter, or Instagram		
I enjoy outdoor activities (passive or active)		[OUTDOOR TRAVEL SCREENERS; TERMINATE IF NO]
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

SNOW2. [ASK IF SNOW=YES] Have you been on a snow vacation in the past 2 years where the main purpose of the trip was to snow ski and/or snowboard?

- Yes [ACTIVE SNOW TRAVELER]
- No

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END OF SCREENERS

Q1. If you were thinking about taking a winter/snow leisure trip to a place within the United States with mountains, lakes and an abundance of outdoor activities, where would you go?

Q2. For which of these leisure vacation destinations have you seen or heard any advertising lately?

[ROTATE]
[INSERT COMPETITIVE SET]

Q3. Which of the following places have you visited for a winter/snow leisure trip in the last 3 years? Select all that apply.

[ROTATE]
[INSERT COMPETITIVE SET]

Q4. How would you rate each of these destinations as a place to visit for a winter/snow leisure trip?

[ROTATE]	Poor – 1	2	3	4	Excellent – 5	Don't know – 9
[INSERT COMPETITIVE SET]						

Q5. How likely are you to take a winter/snow leisure trip to any of the following destinations in the next year?

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

Now we'd like you to consider a couple of these destinations in more detail and rate them in terms of how much each of these statements applies to them.

[ASK ABOUT MAMMOTH LAKES IF Q4#9 AND ONE DESTINATION WHERE Q3=1. IF Q3=0 FOR ALL DESTINATIONS, ASK ABOUT ONE DESTINATION WHERE Q4#9.]

Q6. How would you rate [DESTINATION] in each of the following areas?

[ROTATE]	Does not apply at all	Does not describe well	Neutral	Describes destination well	Completely describes destination
An outdoor "playground"					
A place for outdoor adventurers					
A good place to indulge a passion for the great outdoors					
Offers a wide variety of outdoor activities					
Has a "small-town" feel					
Is invigorating and charged					
Is a good place to re-energize and recharge					
Is serene and rejuvenating					

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Is a good place to relax in peace and quiet					
A place with friendly people					
Is unpretentious and real					
Has beautiful natural scenery					
Has an abundance of natural terrain					
Inspires adventure					
Is a rugged place					
Is a fun place to visit					
Is an exciting place to visit					
Is convenient to get to					
Has a great climate					
Is a good place for a family vacation					
Is a good value for the money					
Has quality lodging options					
Is a good value					
Has a good variety of restaurants					
Has activities that are easily accessible once you are there					
Is an upscale destination					
Has an abundance of year-round activities					
Is a good weekend getaway destination					
Is a good place to go for skiing, snowboarding, and other snow sports					

Q7. [ASK IF Q3=1 FOR MAMMOTH LAKES] You mentioned that you traveled to Mammoth Lakes, California in the past few years. Thinking about your overall experience in Mammoth Lakes, would you say it was...?

Poor	Fair	Good	Very good	Excellent

Q8. When did you travel to Mammoth Lakes for a leisure trip? [SHOW, PRIOR to July 2019 MONTHS JULY 2019-MARCH 2020] Select all that apply.

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

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Questionnaire – Northeast

PLANNING & MOTIVATION

Now we'd like you to think more generally about how you typically plan your snow trip(s).

Q10. In the course of researching or planning a leisure trip to a snow destination, have you gathered information in any of the following ways? *Select all that apply.*

[ROTATE]

Destination website (for example www.visitmammoth.com)
Other destination website (such as 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

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					

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	1	2	3	4	5	6	7	8	9	Extremely likely

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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 MEDIA; ROTATE ADS WITHIN EACH MEDIUM. 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

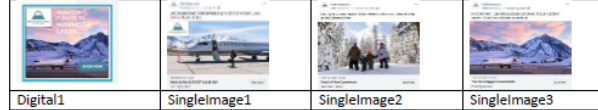
WINT2. What is your reaction to these ads?

- Positive
- Negative
- Neutral

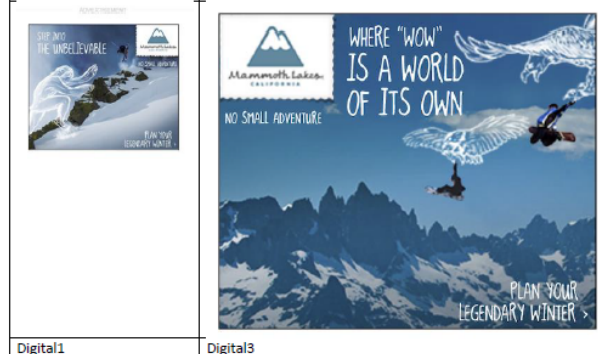
WINT2a. [ASK IF WINT2 IS NEGATIVE; ASK] Why do you feel that way? _____

[ADS ARE NEW; ROTATE MEDIA AND ADS WITHIN MEDIA; DO NOT TRUNCATE ON AWARE]

Air service



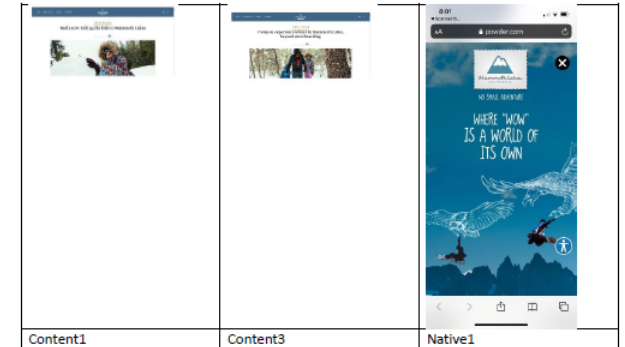
Digital display



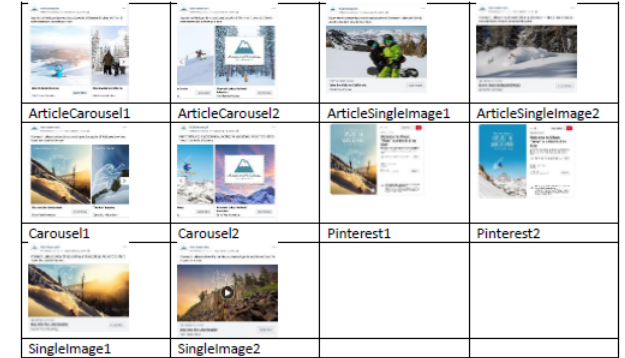
Native

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Social static



Social videos



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Questionnaire – Northeast

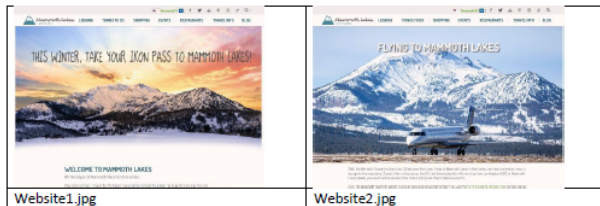
YouTube_TrueView Mammoth_Brand_Find _Flights_V2_Button.mp4 # 392966137	Video1 No_Small_Backyard _High_Places.mp4 # 392967675	Video2 MAM_NSB_Above _Average_FINAL.mp4 # 392969065	Video3 No_Small_Backyard _Get_Lost.mp4 # 392969641
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[PROGRAMMING - Show all ads together and ask if they've seen "any/either of these ads/articles" unless videos or otherwise indicated]
[AFTER SHOWING ALL ADS, ASK]

GRIDs. 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 IMAGES OF WEBSITE WITH CHECK BOXES]



Which of these websites have you visited recently? [SHOW "Neither" option]

[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

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GUIDE. [SHOW COVERS OF 2019 AND 2020 VISITOR GUIDES] Have you used either of these Visitor Guides? YES/NO
[I:\Ads Master\Mammoth Lakes\NE markets winter 2019-20\2020 Visitor Guide.png](#)
[I:\Questionnaires\Mammoth Lakes\2019 visitor guide.png](#)



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

GUIDES. 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

SOCIAL 1. Do you follow Visit Mammoth on any of the following social channels?
Facebook
Instagram
Twitter
Pinterest
TIKTok
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...?
Married

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Divorced/separated
Widowed
Single/never married

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

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.)
0-4 years of age
5-12 years of age
13-18 years of age

income. Which of the following categories best represents your total household income before taxes?
Less than \$35,000
\$35,000 but less than \$50,000
\$50,000 but less than \$75,000
\$75,000 but less than \$100,000
\$100,000 but less than \$150,000
\$150,000 but less than \$200,000
\$200,000 - \$300,000
\$300,000 - \$400,000
\$400,000-\$500,000
\$500,000+

ethnicity. Which of the following best describes your racial or ethnic heritage? [ALLOW MULTI]
African American
Asian American
Caucasian
Hispanic/Latin American
Mixed ethnicity
Native American
Other

gender. Do you identify as...
Male
Female
Other
Prefer not to answer

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