
visit greater palm springs
Greater Palm Springs Image & Awareness
Released June 2026
SMARInsights

Background & Objectives

- Visit Greater Palm Springs implemented a new brand campaign in consumer leisure markets in the fall and winter of 2024 and 2025 after testing creative with SMARInsights. The organization is interested in understanding the performance of the campaign through research that evaluates the reach of the campaign, it's influence on key performance indicators such as perception of the destination and likelihood to visit, and the trips to the Greater Palm Springs area attributable to the investment.
- But in addition, this research allows for an understanding of the brand image and perception of Greater Palm Springs in a competitive context. With this, the Image and Awareness research does double duty in evaluating the short-term influence of paid media while providing direction for long-term messaging.
- The goals of the research are to:
  - Evaluate the reach and efficiency of the paid media in Greater Palm Springs' target markets;
  - Understand reaction to the creative against national benchmarks;
  - Determine the influence of the campaign on generating travel and visitor spending;
  - Assess the competitive position of Greater Palm Springs on key performance indicators;
  - Understand differences in key performance indicators among Greater Palm Springs target markets and audience segments;
  - Determine strengths and opportunities for Greater Palm Springs within the competitive set for brand positioning and product perception;
  - Uncover differences in brand positioning and product perception among the destination's target markets and audience segments;
  - Explore what products consumers find motivating compared to Greater Palm Springs' performance; and
  - Provide Visit Greater Palm Springs with potential messaging that would improve the destination's position in the competitive set.

Methodology

- Online surveys were conducted in Visit Greater Palm Springs' target markets. Overall, the DMO targets 20 markets (including Greater Palm Springs) with paid targeted tourism media, with 5 markets considered nearby Gateway or Drive markets, 12 markets considered National or Fly markets, and 3 Canadian markets as International targets.
- Overall, nearly 7,000 surveys were conducted in the target markets, with the distribution at the right.
- In order to qualify for the survey, respondents were screened as targets of the DMO including age and income. All respondents have a household income of least $75,000 and are between the ages of 25 and 80.
- Multiple sample vendors were utilized in data collection.
- Once data collection was complete, the data were cleaned and coded for analysis. The following is a summary of results.
- A copy of the questionnaire used for data collection appears in the Appendix.

Gateway Markets		1,656
1	Los Angeles, CA	375
2	San Diego, CA	304
3	San Francisco, CA	377
4	Las Vegas, NV	225
5	Phoenix (Prescott), AZ	375

Fly Markets		4,081
6	Seattle-Tacoma, WA	299
7	Portland, OR	259
8	Chicago, IL	375
9	New York, NY	382
10	Minneapolis-St. Paul, MN	374
11	Denver, CO	375
12	Dallas-Ft. Worth, TX	376
13	Houston, TX	374
14	Salt Lake City, UT	255
15	Atlanta, GA	375
16	Austin, TX	262
17	Washington DC	375

International Markets		1,202
18	Vancouver	400
19	Calgary	401
20	Toronto	401

20	Total Interviews	6,939

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Overall Results

- Though the nearby Gateway Markets are the most familiar and have considerably more experience with Greater Palm Springs, the Canadian markets and Fly markets are quite similar to one another.
- Competitively, Greater Palm Springs excels in having product for health, wellness, and relaxation. In terms of brand personality, Greater Palm Springs stands out for being a health and wellness-focused oasis.
- Given where Greater Palm Springs already excels and what consumers find important, future messaging that leans into the destination as serene, transformative, and elegant would motivate additional interest in visiting.
- Among domestic consumers who anticipate traveling less within the U.S., the top six reasons cited were all related to economic and political pressures. Even so, 32% of domestic travelers in the Visit Greater Palm Springs (VGPS) target markets still anticipate taking more overnight trips in the coming year, compared to last year.

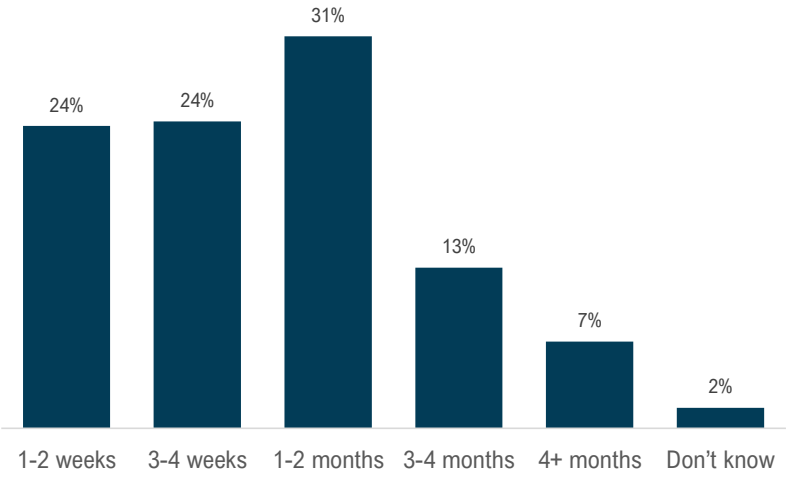
General Leisure Trip Behavior

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Advance Planning

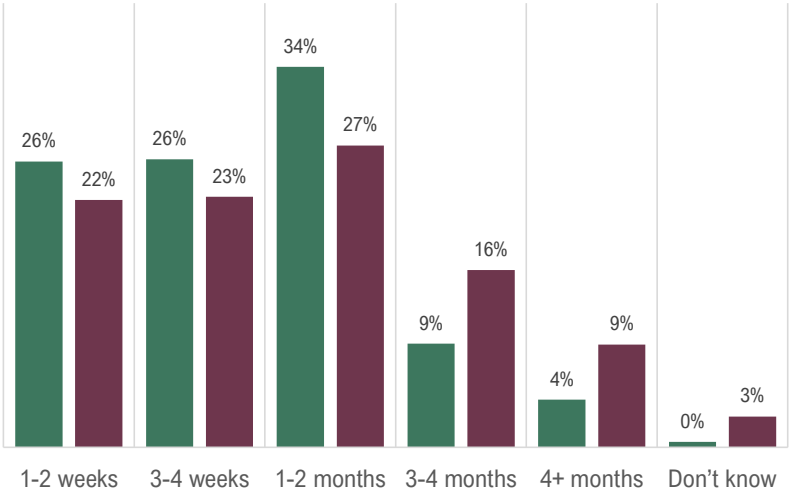
Advance Planning

- Nearly half of all visitors to Greater Palm Springs plan trips less than 1 month in advance. Only 1 in 5 visitors begins planning more than 3 months in advance.



Advance Planning by Market Type

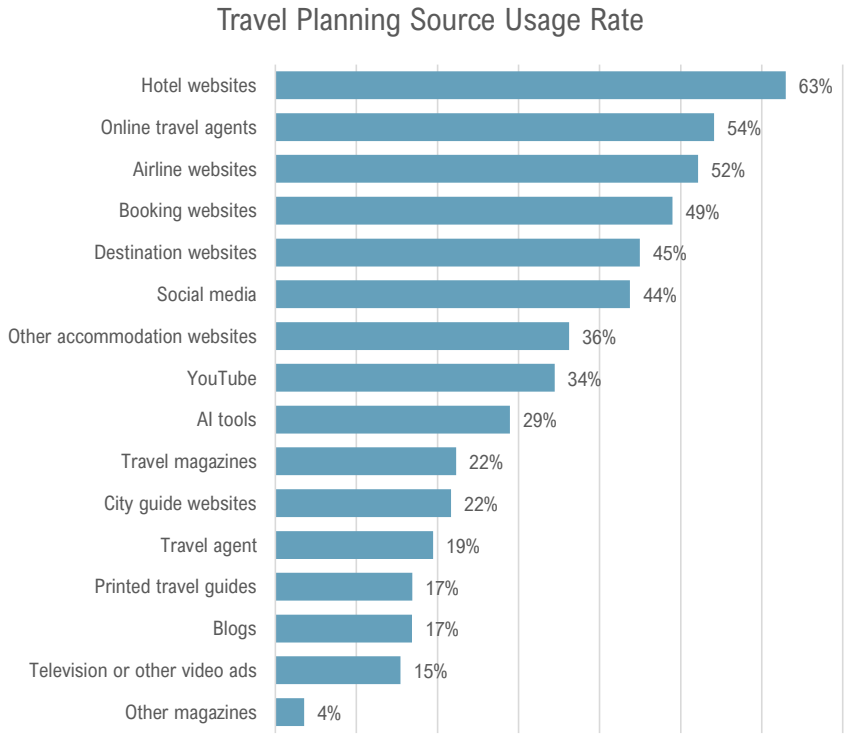
- Regardless of market type, most Greater Palm Springs visitors begin planning their trips less than 2 months in advance.



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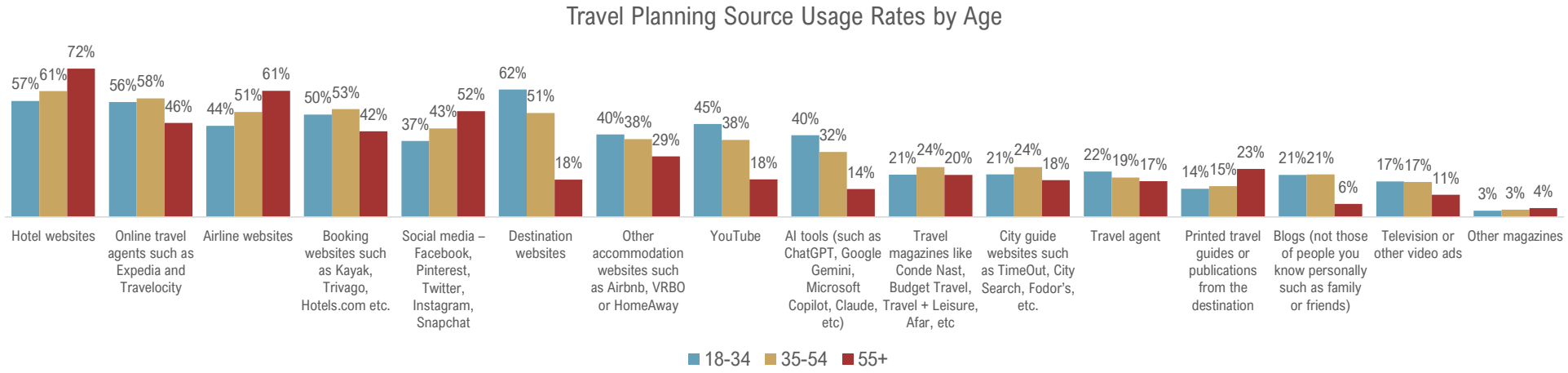
Travel Planning Sources
Overall

- The most frequently used travel planning sources are the expected essentials: hotel websites, online travel agencies like Expedia and Travelocity, airline websites, and booking platforms such as Kayak and Trivago.
  - Their dominance reflects their critical role in securing transportation and accommodations.
- When it comes to planning activities and exploring what a destination has to offer, travelers turn most often to destination websites, closely followed by social media. These channels serve as key inspiration and information hubs once the logistics are in place.
- Sources following the required logistic platforms and primary source platforms are more niche, with each used by no more than 34% of travelers.
  - AI Tools: emerging as exploratory aids, helping travelers generate ideas, compare options, and personalize trip planning, despite usage remaining limited for now.
  - YouTube: visual inspiration, offering firsthand experiences, destination walkthroughs, and influencer recommendations.
  - TV or Video Ads: primarily plant the seed of where to go, often acting as the initial trigger for destination awareness. Less commonly used for detailed planning or itinerary decisions.



Travel Planning Sources
By Age Group

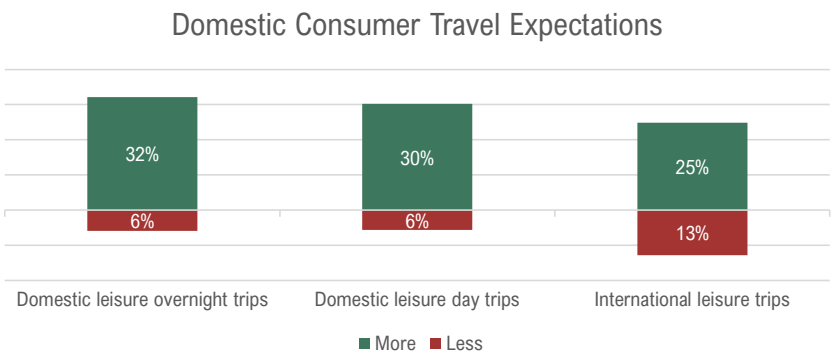
- Age plays a significant role in how consumers go about each stage of the travel planning process.
  - Older travelers tend to favor direct channels, such as hotel and airline websites, when booking their trips. In contrast, younger consumers are more likely to rely on secondary sources like online travel agencies, booking platforms, and alternative accommodation sites.
  - Younger audiences are more likely to explore things to do using digital-first tools, especially destination websites, YouTube, and AI platforms. These sources offer interactive, personalized, and visually rich content that resonates with younger planning styles. In contrast, older consumers tend to rely on more traditional sources, favoring social media and printed travel guides provided by the destination.



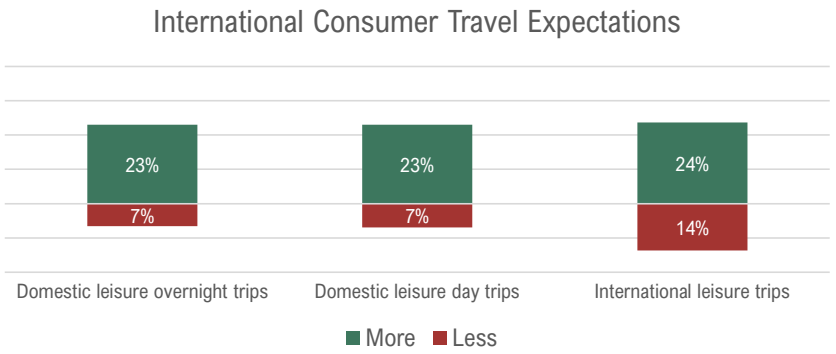
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Future Travel Expectations

- Domestic travel intent is on the rise, which is good news for U.S. destinations. However, intent doesn't always translate directly into action.
- Domestic consumers anticipate taking more trips of all types in the coming year compared to last. Fewer than 10% expect to reduce their domestic overnight or day travel.
- In contrast, international travel shows more hesitation, with 13% of consumers anticipating fewer trips abroad. This suggests that while some travelers may scale back on global travel, they likely still want to travel, and are more likely to do so within the U.S.



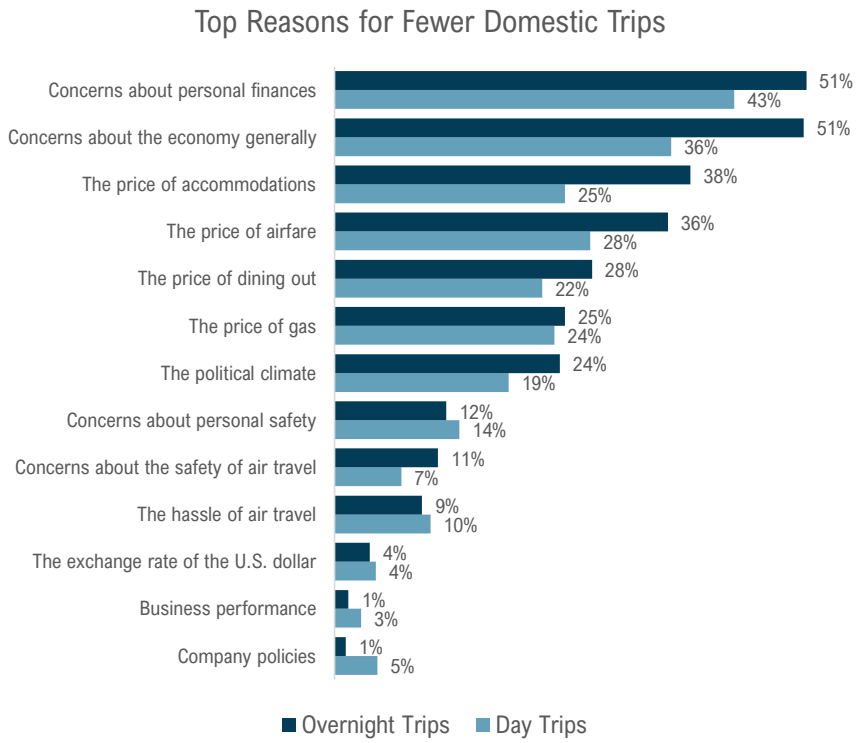
- International travel intent is softening, which poses a challenge for U.S. destinations. Similar patterns emerged among international consumers, with 14% anticipating fewer trips outside their home country in the coming year. This signals potential headwinds for U.S. destinations aiming to attract global visitors.
- The trend reflects a broader shift, influenced by rising political and economic tensions between nations, factors that may be reshaping how travelers approach international trips.



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Future Travel Concerns
Domestic Consumers

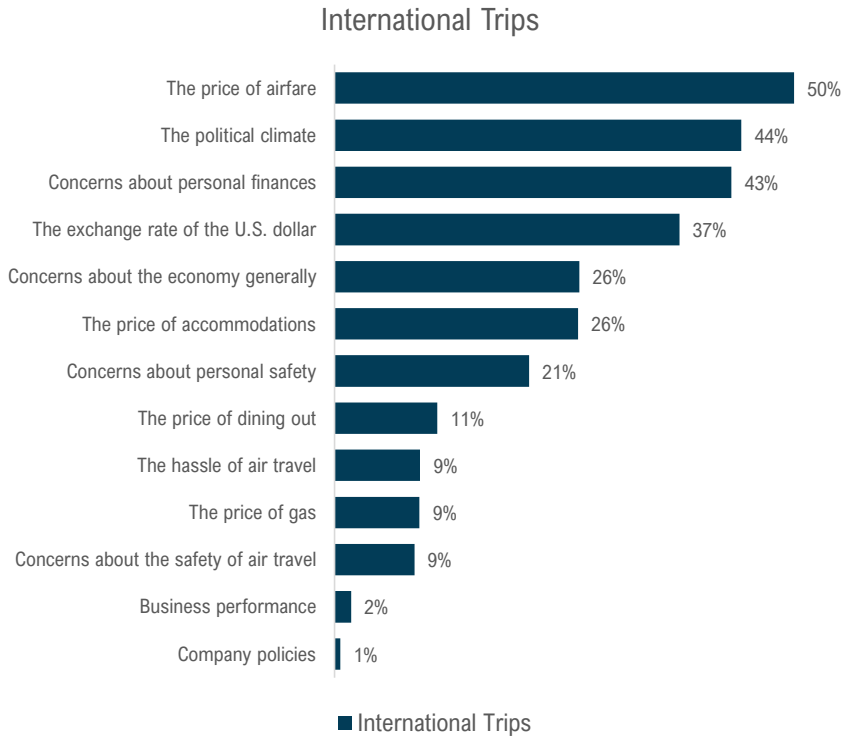
- Financial concerns are the primary barrier to domestic travel. Among domestic consumers who anticipate traveling less within the U.S., the top six reasons cited were all related to financial pressures, including personal finances and broader economic uncertainty.
  - These concerns dominated both overnight and day trip decisions, underscoring the role of affordability in shaping travel intent.
- The only non-financial factor mentioned by more than 20% of these consumers was the current political climate, showing that broader societal tensions are also influencing travel behavior.
- While local tourism organizations can shape perception and promote value, they have little control over macro-level factors like personal finances, national economic conditions, or political climate. These external pressures often drive travel hesitancy, especially among domestic audiences.
  - Destinations can stay competitive by responding strategically to shifting travel intent. While broader concerns like personal finances, economic uncertainty, and political climate are largely outside a destination's control, there are still meaningful ways to adapt. Emphasizing affordability, offering flexible options, and reinforcing emotional value can help destinations remain attractive even in challenging conditions.
  - Encouragingly, 32% of domestic respondents anticipate taking more overnight trips in the coming year. By targeting demographics that are maintaining or increasing their travel activity and aligning messaging with what matters most to them, destinations can help offset potential losses from more hesitant segments.



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Future Travel Concerns
International Consumers

- International travel intent is shaped by a mix of financial and geopolitical concerns. While financial factors, including airfare costs, personal finances, and broader economic conditions, remain top concerns for international travelers, many also report heightened sensitivity to the current political climate.
  - As expected, the exchange rate of the U.S. dollar was also a significant financial factor.
- Canadian travelers are showing increased caution amid rising tensions between the U.S. and Canada. Recent diplomatic strains and trade uncertainties have added friction to cross-border travel, potentially dampening enthusiasm for U.S. visits despite geographic proximity.



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Trip Characteristics

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Visitor Spending

- Overnight visitor spending in Greater Palm Springs has increased by 12% since 2023, on average—now over $2,000 in total spending per trip.
- Visitor spending on lodging and accommodations has increased by 10% overall, on average, but visitor spending on shopping has grown the most relative to 2023—an increase of 23% total.
- Greater Palm Springs visitors from national fly markets spend the most on their trips, while visitors from gateway drive markets spend less.
- Partly, this difference can be attributed to a longer length of stay for visitors from national fly markets—over 50% longer. Visitors from national fly markets spent just 12% more on a nightly basis than visitors from drive markets.
- The sample of international visitors was not viable for this analysis.

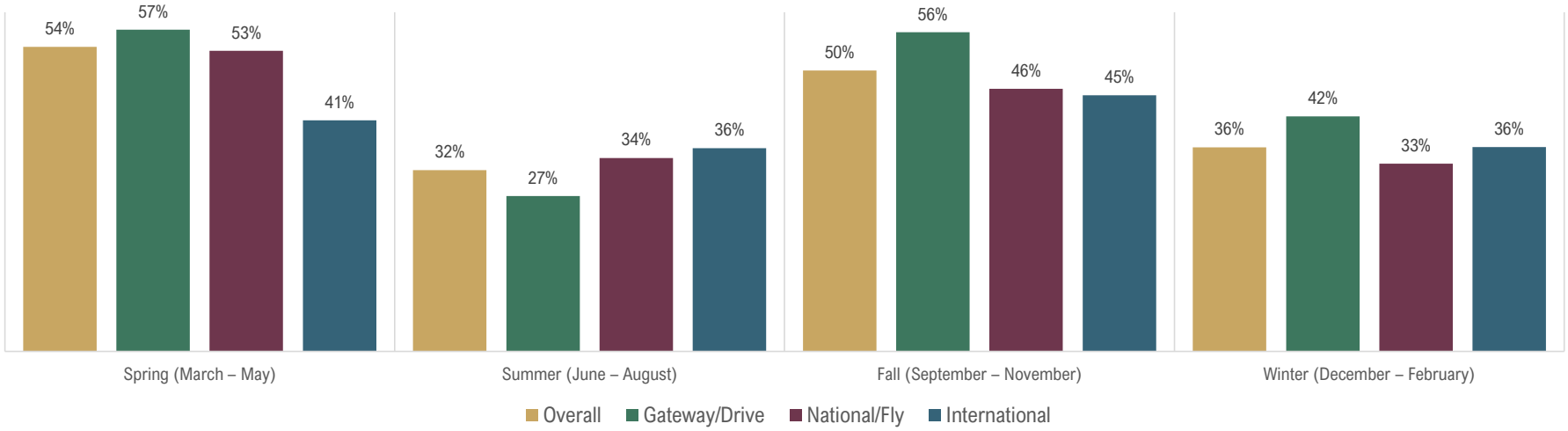
Spending Category	2025	2023	Change
Lodging	**$750**	$681	10%
Meals / Food	**$393**	$352	12%
Attractions / Activities	**$270**	$283	7%
Shopping	**$349**	$252	23%
Entertainment	**$147**	$138	6%
Local Transportation	**$135**	$121	11%
Total	**$2,043**	$1,827	12%

Spending Category	Fly	Drive
Lodging	**$844**	$626
Meals / Food	**$465**	$321
Attractions / Activities	**$365**	$180
Shopping	**$463**	$239
Entertainment	**$216**	$79
Local Transportation	**$194**	$76
Total	**$2,548**	$1,521

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Seasonal Destination Appeal

- Spring and fall are the most appealing seasons for visiting Greater Palm Springs, across all market types.
- Gateway/Drive markets are the least interested in visiting Greater Palm Springs during the summer.
- International travelers are the least likely to be influenced by seasonal travel patterns.

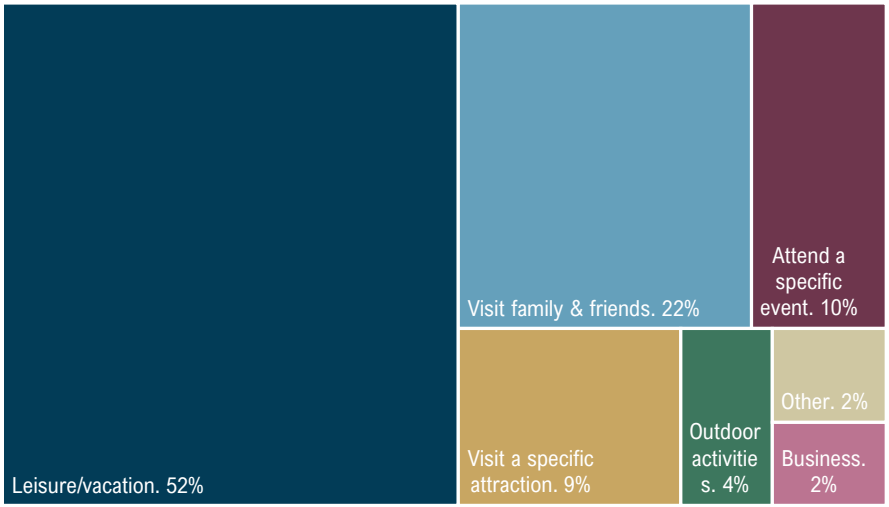


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Travel Purpose

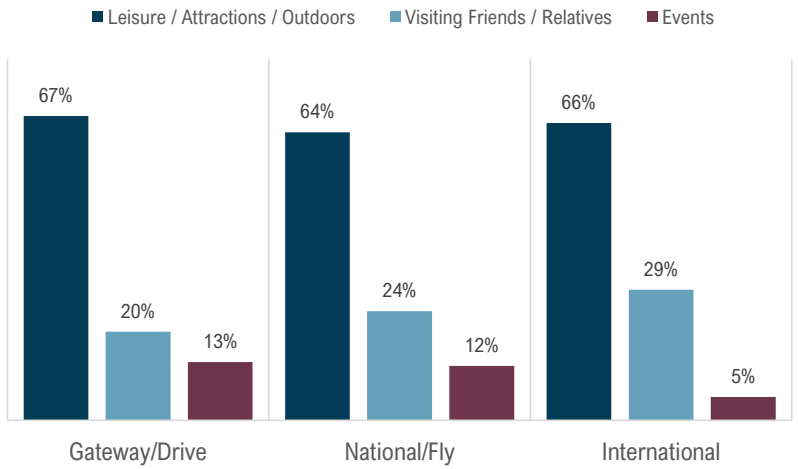
Travel Purpose

- Travelers are most likely to visit Greater Palm Springs for a leisure vacation—with a sizable minority traveling to visit family and friends in the destination.



Travel Purpose by Market Type

- Most Greater Palm Springs visitors are leisure travelers.
- Origin markets do not have a strong influence over travel purposes for domestic Greater Palm Springs visitors.

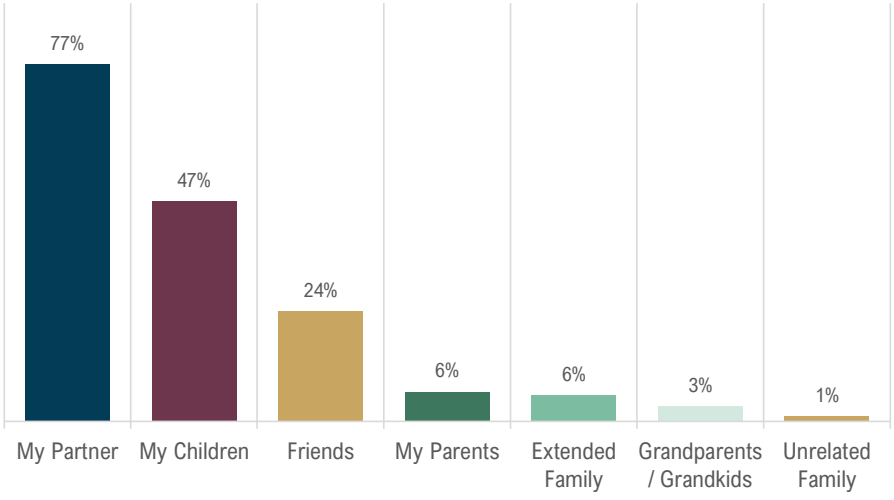


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Travel Party Composition

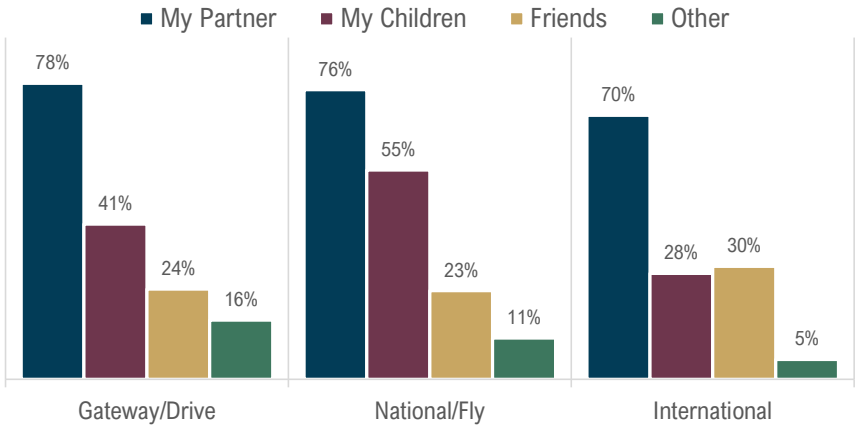
Travel Party Composition

- Most Greater Palm Springs visitors are traveling with their spouse, partner, or significant other.
- 24% are traveling with friends.



Travel Party Composition by Market Type

- National visitors are more likely to be traveling with children than visitors from Gateway/Drive markets.
- However, a spouse, partner or significant other is the most common travel companion, by far.

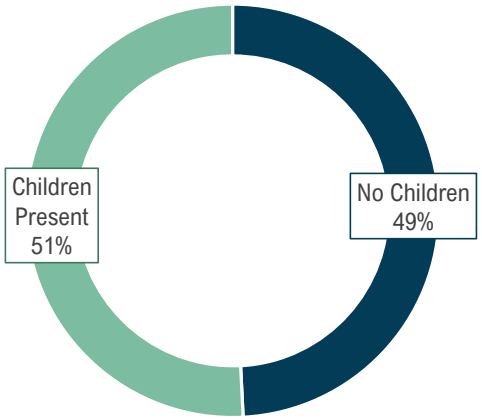


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Family Travel Parties

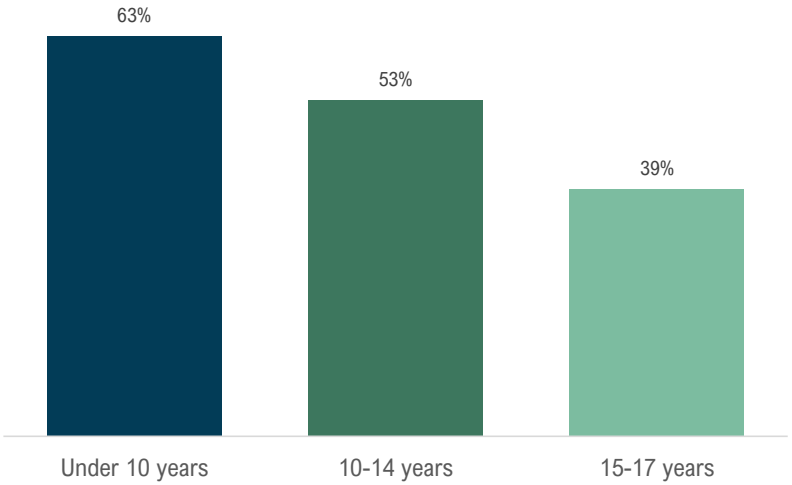
Traveling with Children

- Half of Greater Palm Springs visitors are traveling with children, while half are not.
- It is important to motivate families to visit.



Age of Children in Family Travel Parties

- Most family travel parties include children under the age of 14—and 63% include children under the age of 10. Meanwhile, only 39% of family travel parties include teenagers who are 15 to 17 years old.

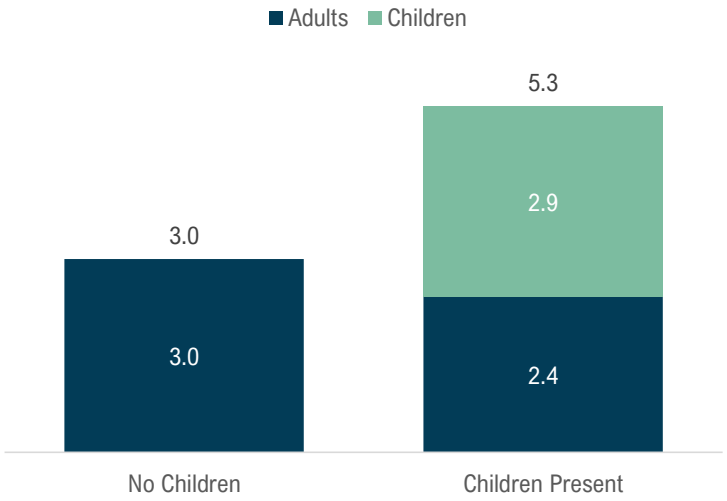


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Travel Party Size

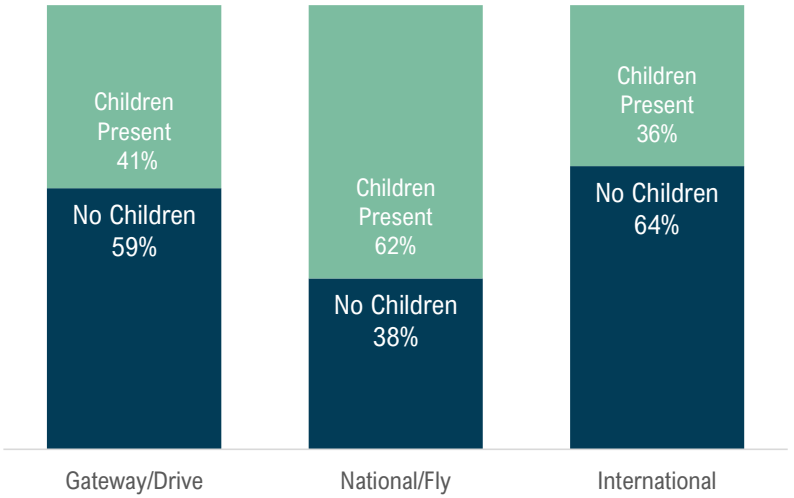
Travel Party Size

- Travel parties that include children are significantly larger than those that do not, averaging 5.3 people. However, there are more adults in travel parties that do not include children.



Family Travel by Market Type

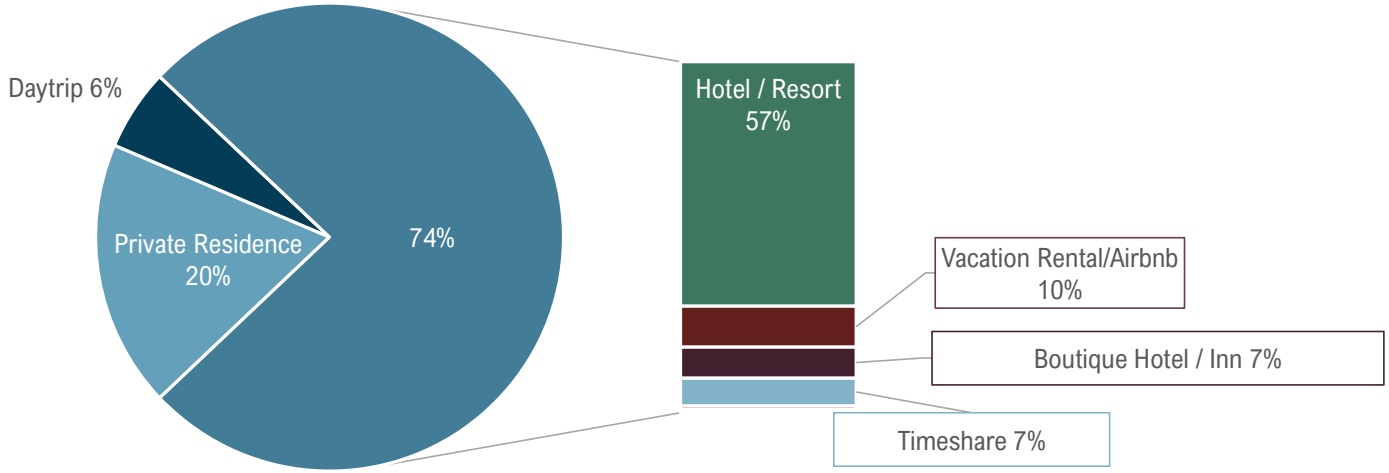
- Travelers from National/Fly markets are the most likely to visit Greater Palm Springs as a family, while Gateway/Drive market visitors are less likely to travel with children.



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Accommodations

- 74% of Greater Palm Springs visitors stay in paid accommodations, with the largest share staying in hotels or resorts.
- Just 6% of visitors are only visiting for the day.
- Meanwhile, 20% of visitors are staying with friends and family on their trips. That means 90% of all travelers who are visiting friends and family in Palm Springs are staying in a private residence, rather than paid accommodations.

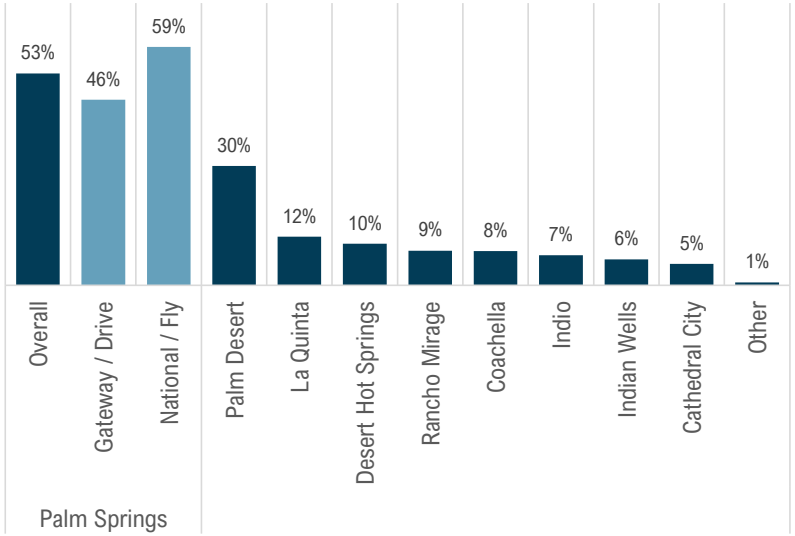


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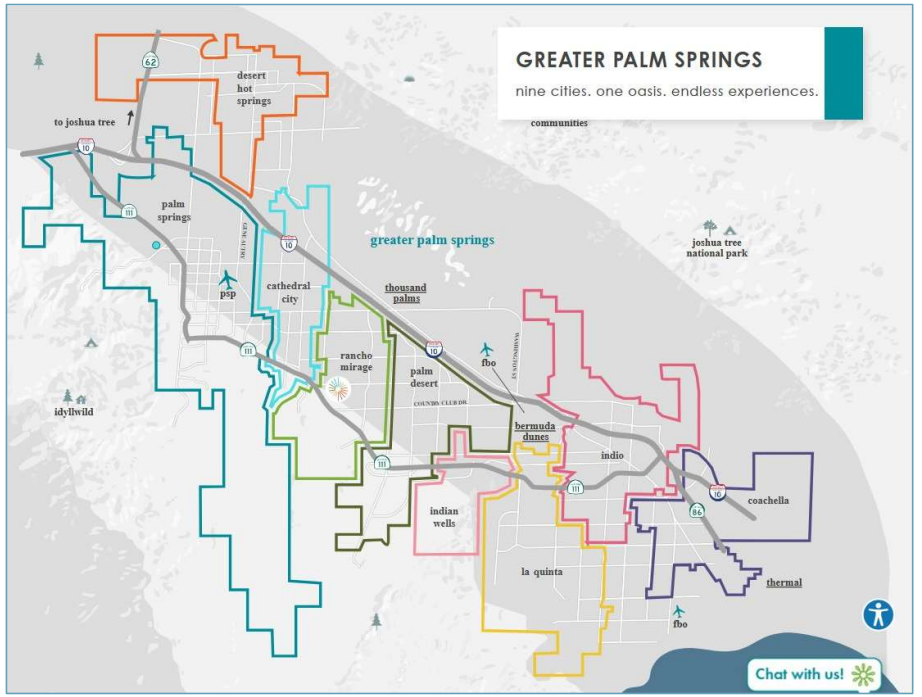
Overnight Lodging Locations

Greater Palm Springs Lodging Locations

- More than half of all visitors to the Greater Palm Springs area stayed in overnight accommodations located in the city of Palm Springs.



Map of Greater Palm Springs

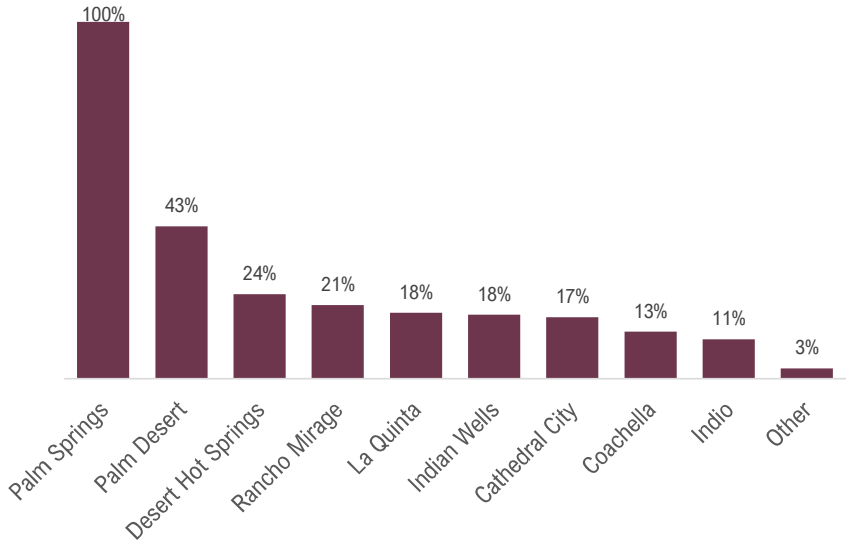


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Overnight Lodging Locations

Other Cities Visited

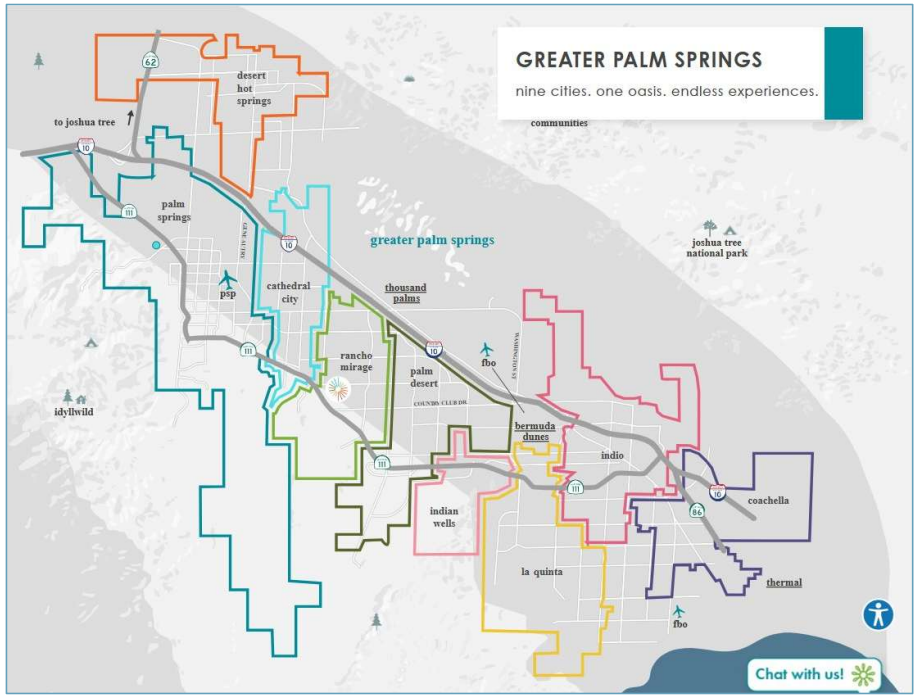
- Visitors who stay overnight in paid accommodations in the city of Palm Springs also visit the cities of Palm Desert, Desert Hot Springs, and Rancho Mirage.



Greater Palm Springs Cities Visited

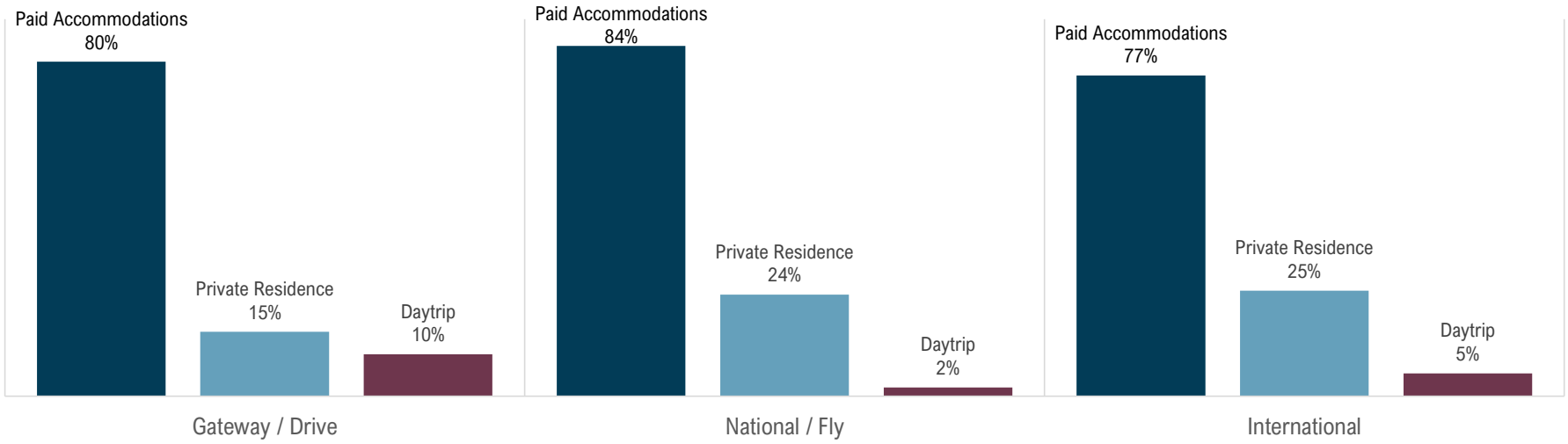
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Map of Greater Palm Springs



Accommodations by Market

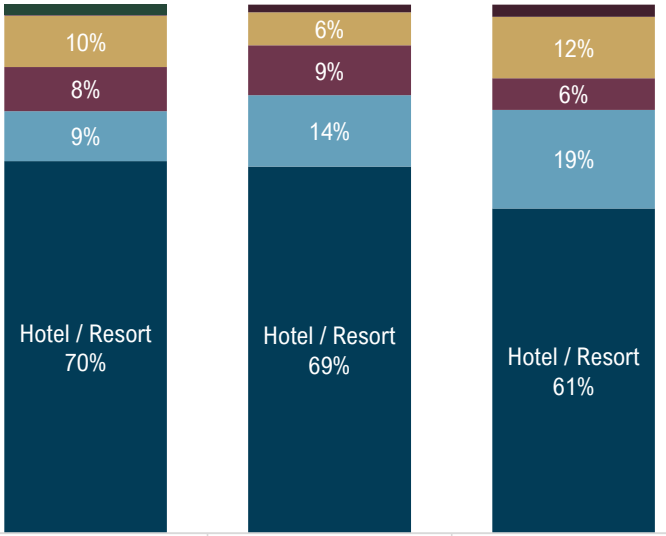
- Most Greater Palm Springs visitors stay in paid accommodations, regardless of origin market type.
- Visitors from farther away are more likely to stay with friends or relatives in a private residence.
- Visitors from National/Fly markets are the least likely to take a daytrip to Greater Palm Springs.



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Overnight Accommodations

- Most visitors stay at a hotel or resort when visiting Greater Palm Springs.
- Visitors traveling to Palm Springs from National/Fly origin markets are more likely to use home-sharing rental services, like Airbnb, compared to visitors from Gateway/Drive origin markets.
- Very few visitors stay at RV resorts or rental facilities, regardless of their origin market type.

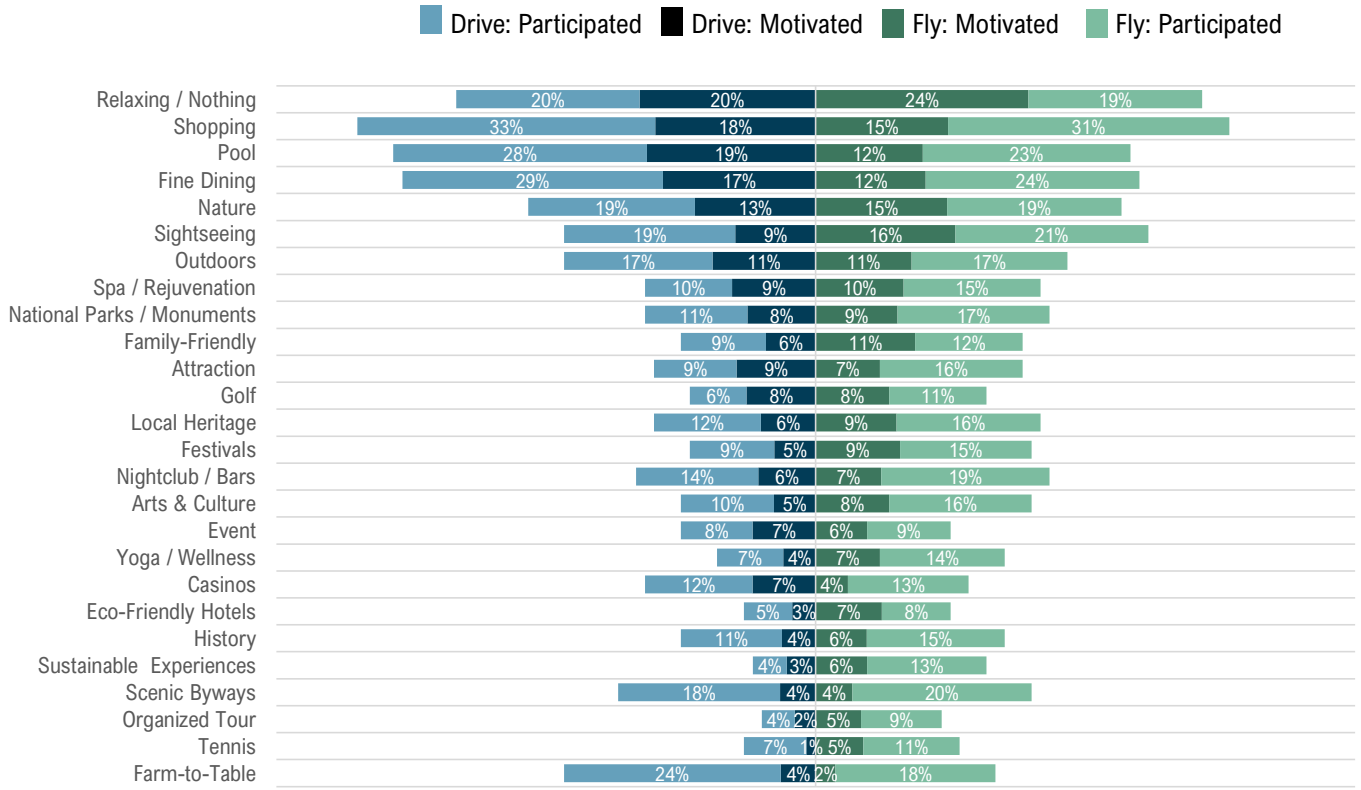


	Gateway / Drive	National / Fly	International
Other	2%	0%	0%
RV Resort / Rental	0%	2%	2%
Timeshare	10%	6%	12%
Boutique Hotel / Inn	8%	9%	6%
Vacation Rental/Airbnb	9%	14%	19%
Hotel / Resort	70%	69%	61%

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Activities & Motivations

- Visitors from Drive markets are more motivated by pools and fine dining than visitors from Fly markets.
- Visitors from Fly markets are more interested in nature and sightseeing, and they are more interested in family-friendly activities than Drive visitors.
- Visitors largely agree that relaxation, shopping, pools, and fine dining are the main motivators for their trips to Greater Palm Springs.

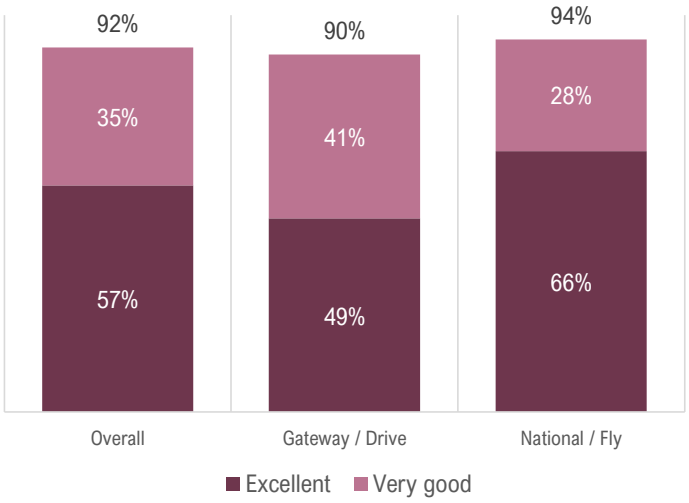


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The Visitor Experience

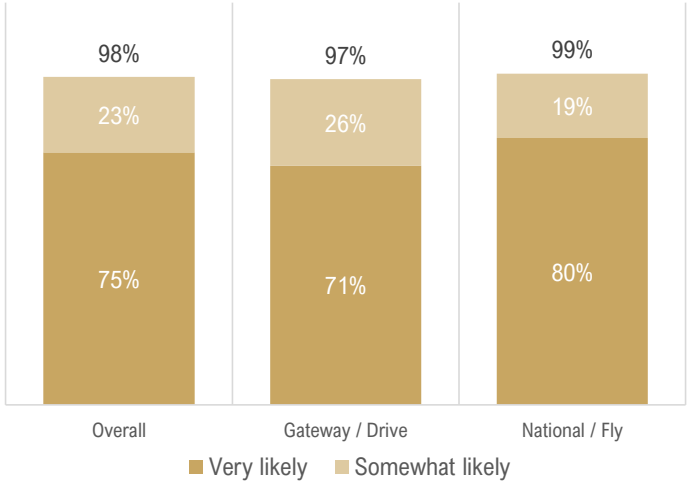
Experience Satisfaction

- 9 in 10 visitors are satisfied with their travel experiences in Greater Palm Springs. Fly market visitors are more likely to rate their experience as excellent.



Visitor Advocacy

- Nearly 100% of visitors would recommend Greater Palm Springs as a leisure travel destination, based on their experiences.



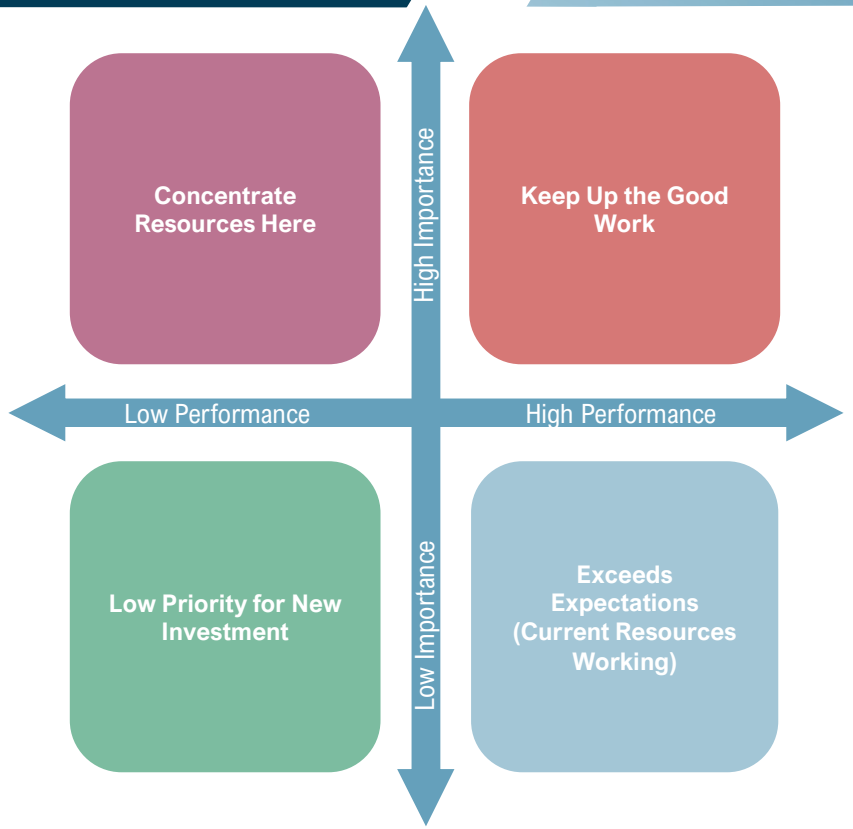
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Key Driver Analysis

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Key Driver Analysis
Overview

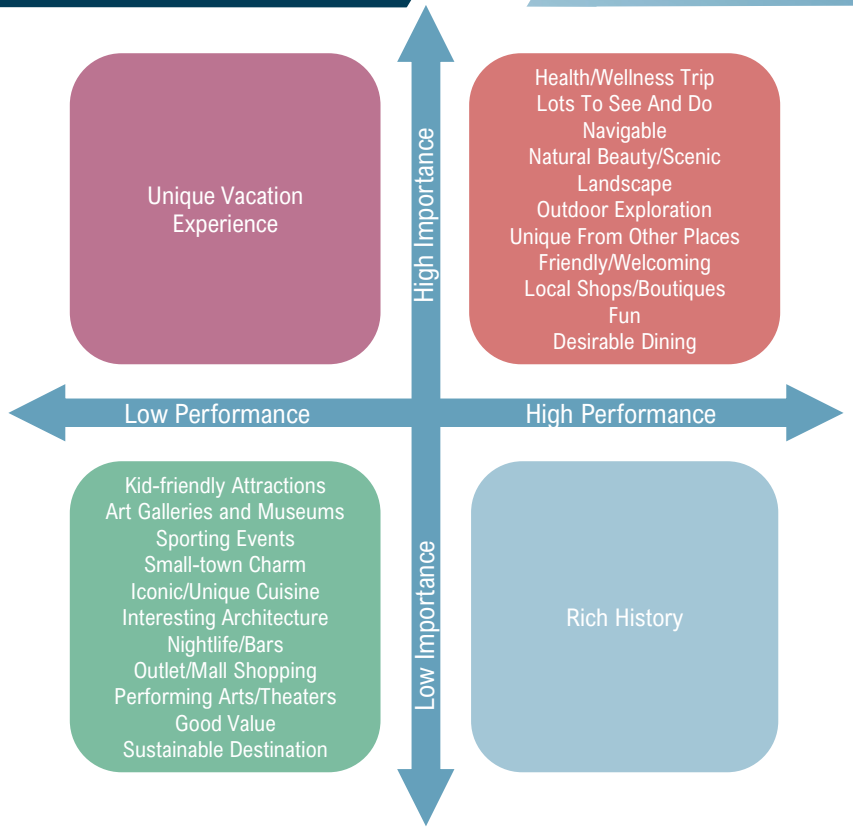
- Respondents were asked to rate how various attributes fit their perception of Greater Palm Springs. Respondents were also asked to rate their overall perception of Greater Palm Springs. With this information, we can derive attribute importance and conduct an Importance-Performance Analysis (IPA) to determine which brand and product are key drivers and which could benefit from additional resources/marketing.
- Once plotted, each attribute will fall into one of four categories:
  - "Keep Up the Good Work"
    - These attributes are important to vacationers and are performing well in Greater Palm Springs.
  - "Concentrate Resources Here"
    - These attributes also play a significant role in improving the overall perception of the destination but were seen as performing below average in Greater Palm Springs relative to other attributes.
  - "Low Priority for New Investment"
    - These attributes were rated below average in Greater Palm Springs, but don't play a significant role in improving the overall perception of the destination and therefore shouldn't be a priority for new investment.
  - "Exceeds Expectations"
    - Respondents rated these attributes very well, but a high rating for these attributes does not correlate to more positive ratings of Greater Palm Springs as a whole to the same level that other attributes do. The current resources in these areas are working.



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Key Driver Analysis
Greater Palm Springs – Product Attributes

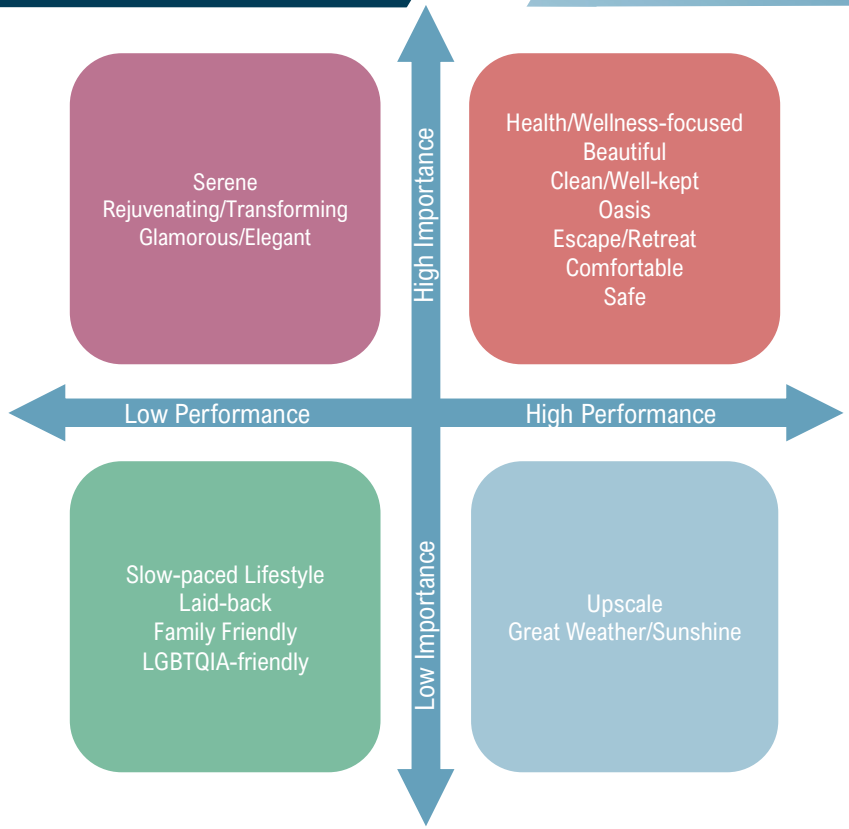
- "Keep Up the Good Work"
  - Several hallmark products of Greater Palm Springs fall into this quadrant, a highly encouraging outcome. These attributes not only outperform others in terms of perceived quality but also show a strong positive link to overall destination ratings.
  - This reinforces their role as key drivers of Greater Palm Springs' leisure appeal and validates continued investment in these strengths.
- "Concentrate Resources Here"
  - It is very important to consumers that they get a unique vacation experience and Greater Palms Spring currently performs below average in this area.
- "Low Priority for New Investment"
  - Although these attributes received lower performance scores compared to other Greater Palm Springs products, they showed little connection to higher overall destination ratings.
  - This indicates that enhancing these areas is unlikely to significantly impact how Greater Palm Springs is perceived as a leisure destination.



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Key Driver Analysis
Greater Palm Springs – Personality Attributes

- "Keep Up the Good Work"
  - Once again, several core personality attributes land in this quadrant, reinforcing a consistent strength for Greater Palm Springs.
  - Earlier findings highlighted the "oasis" identity as a key differentiator, and this analysis confirms that Greater Palm Springs not only excels in delivering on these traits, but that strong ratings in these areas are closely tied to higher overall destination appeal.
- "Concentrate Resources Here"
  - Attributes for being Serene, Rejuvenating/transforming, and Glamorous/elegant are strongly linked to higher destination ratings, suggesting they deeply influence how people perceive and value the place.
  - Despite their importance, these attributes currently perform below average compared to others. This gap signals a missed opportunity to elevate the destination's appeal.



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Perceptual Mapping

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Perceptual Mapping
Introduction

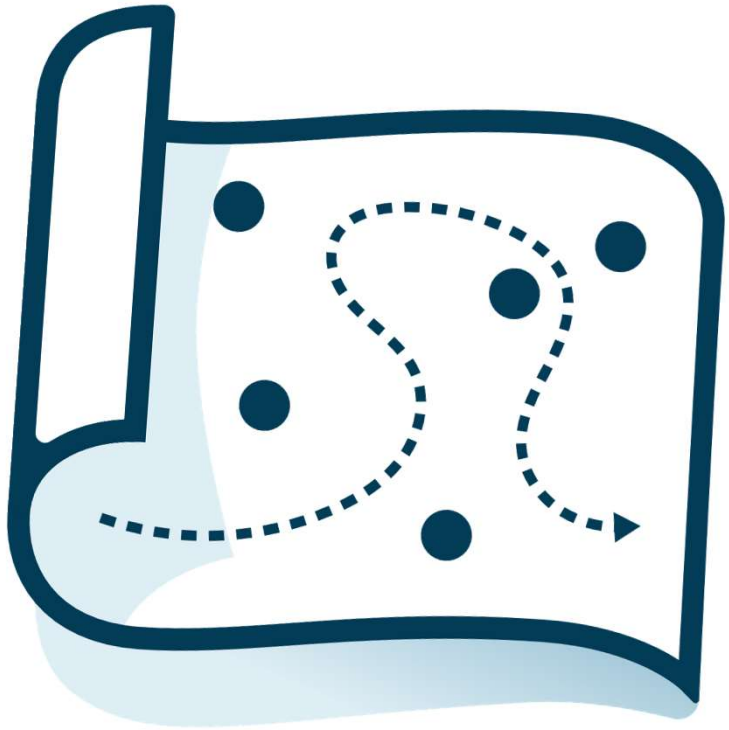
A perceptual map is a visual guide to the competitive landscape.

This visual guide provides context about Greater Palm Springs' image attributes in an otherwise noisy environment. The exercise answers the following questions:

1. *What currently defines Greater Palm Springs' image relative to the comp set?*
2. *Where do the most favorable travelers place Greater Palm Springs on the "map?"*
3. *How do we get to that favorable position and what does the trajectory look like?*

While no exercise answers everything, perceptual mapping, in conjunction with the other insights provided in the study, illustrates an optimized path to the idealized image of the destination.

The beauty of using a perceptual map is that it is both visual and derived from stats (the output of a discriminant analysis to be exact). We can apply numbers to abstract perceptions in a complex environment to reveal what levels to pull for the greatest outcome.

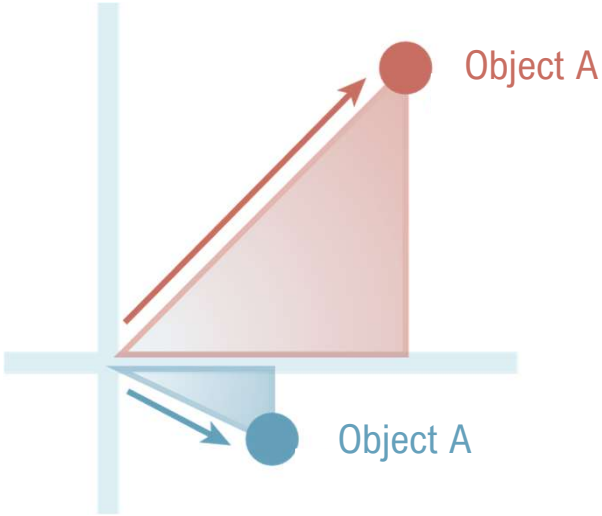


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Perceptual Mapping
Methodology

There are some basic concepts as they pertain to the position of objects:

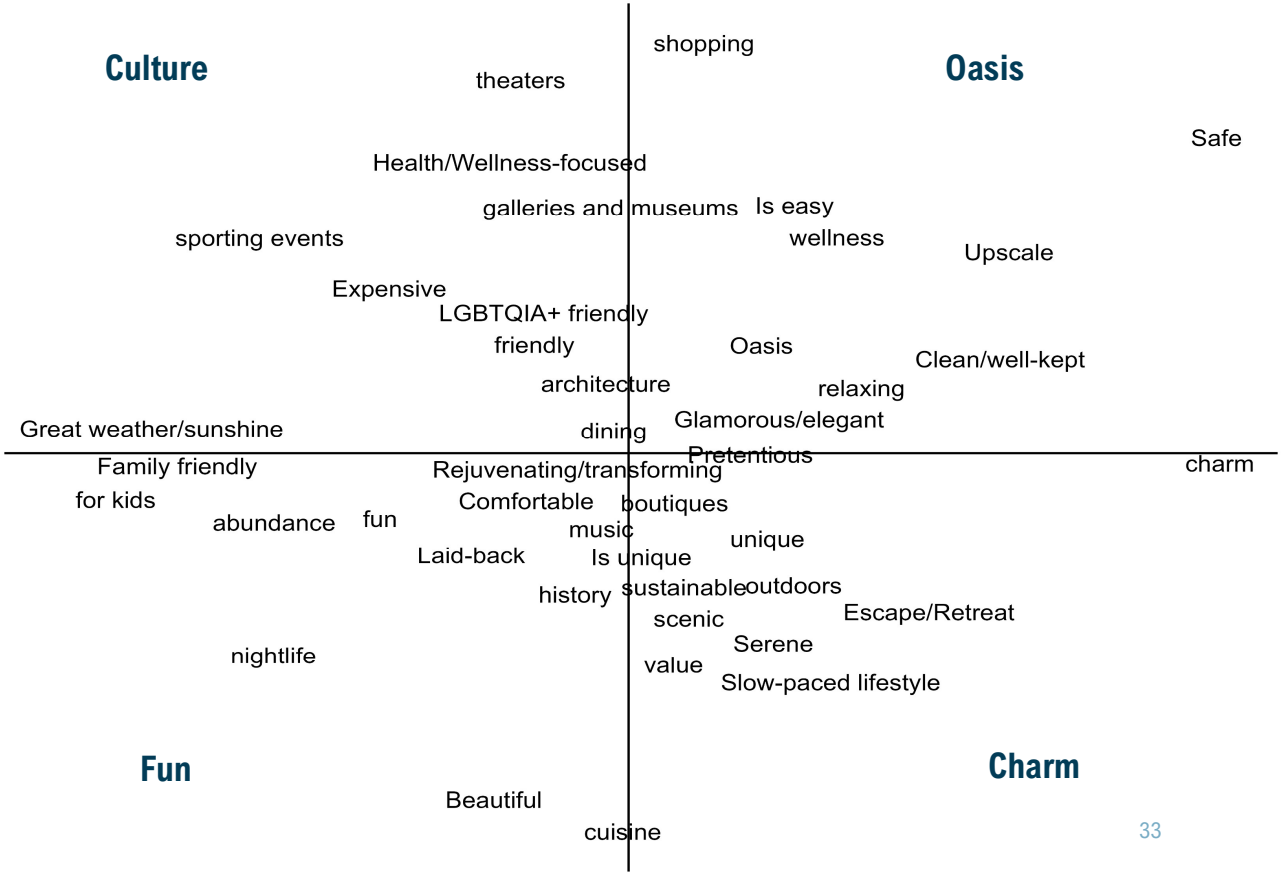
- *The closer to the middle (origin point) of the chart, the less differentiating it is and vice versa.*
- *Changes in ratings for objects (attributes) farther from the middle have greater impact on the position of the buckets (destinations). This distance can be thought of as a force, the hypotenuse of a right triangle, or a trajectory.*
- *These forces are used to calculate trajectories. Trajectories indicate how the image of a destination can change overall by emphasizing key destination attributes.*



The distance from the origin point for Object A is greater than Object B. As such as, each incremental change in rating for Object A will be nearly twice as impactful as the same change for Object B.

Perceptual Mapping
Competitive Landscape

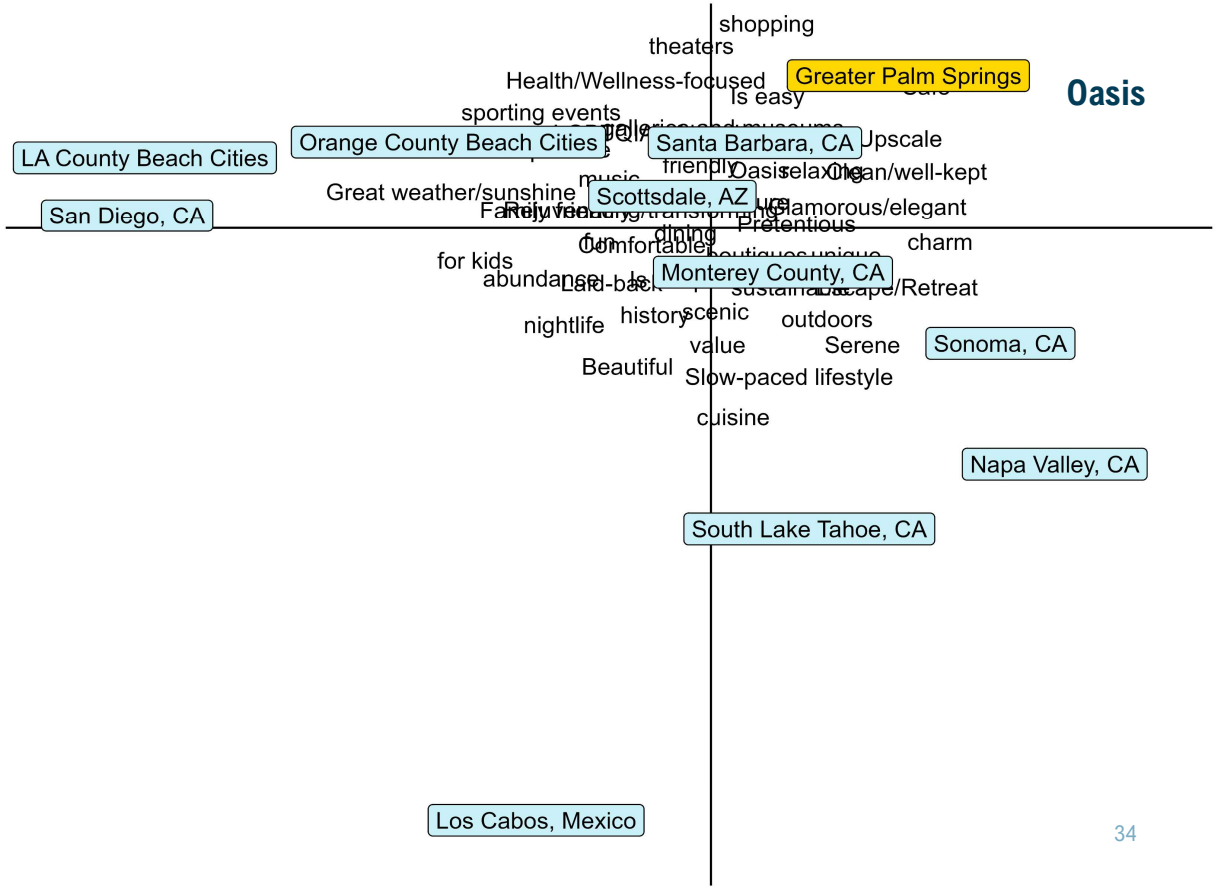
- The scatterplot shown is the perceptual map and includes the 43 destination attributes that were rated.
- These attributes (product and personality) reside on the map according to the output of the discriminant analysis.
- The items near the center are more difficult to sort as they are being pushed and pulled more equally in all directions. On the other hand, items further from the center are easier to sort as they are perceived to be associated with particular destinations.
- Based on positioning of the attributes, we were able to label each quadrant to help interpret the map.
  - Top Left: Culture
  - Top Right: Oasis
  - Bottom Left: Fun
  - Bottom Right: Charm



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Perceptual Mapping
Competitive Positioning

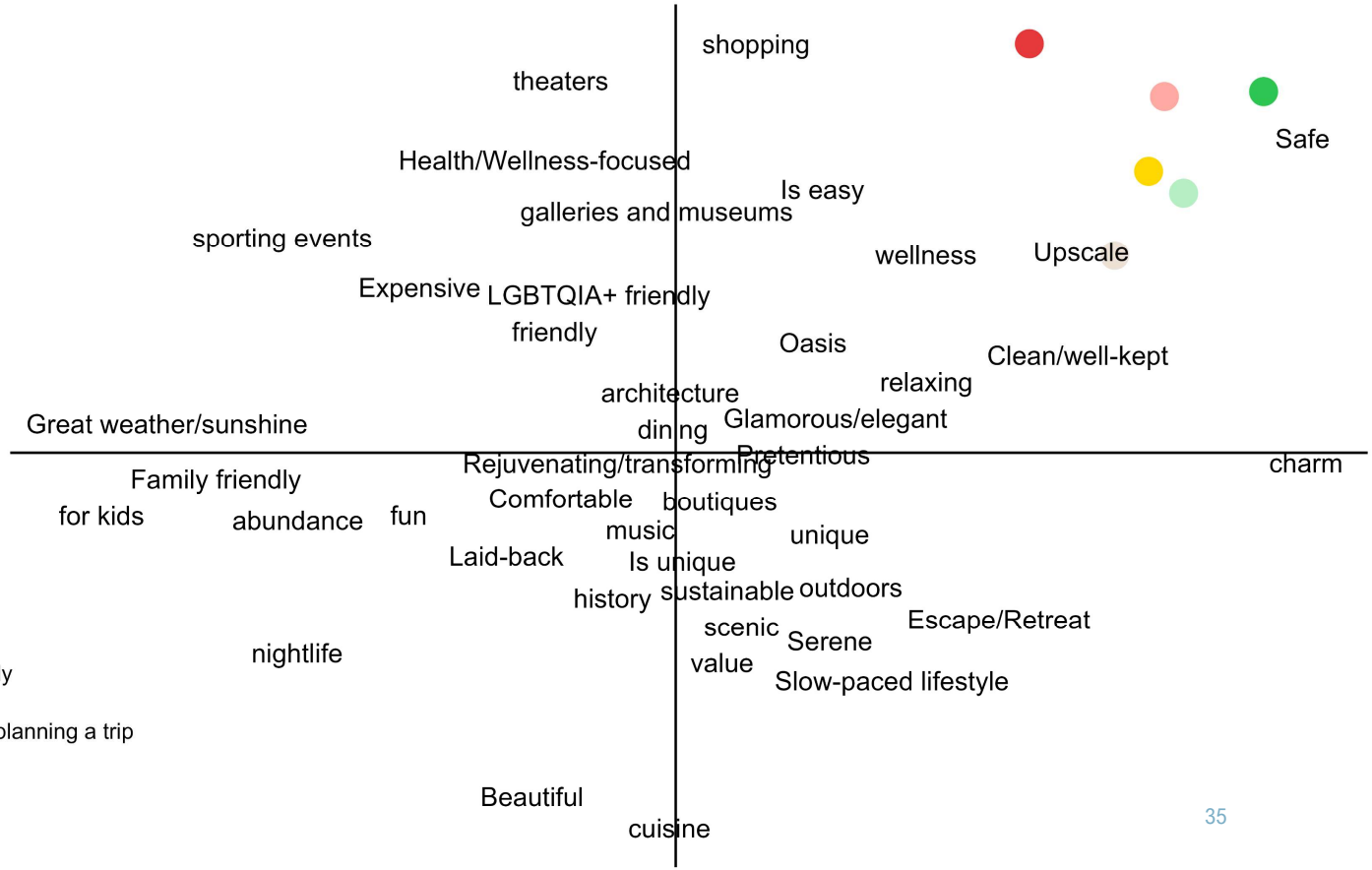
- In addition to the positions of the attributes, the discriminant analysis produces coordinates for each destination in the competitive set.
- The destinations are shown in areas most closely associated with their distinctive attributes.
- Destinations with similar traits tend to be near each other:
  - Napa Valley, Sonoma (wine country)
  - LA County Beach Cities, Orange County Beach Cities, San Diego (big coastal California markets)
- Greater Palm Springs has differentiated itself by being in the top right quadrant. This corner is defined by "Oasis." Key attributes that fall here are oasis, safe, elegant, upscale, and clean.
- To determine what direction Greater Palm Springs should aim to move, we can look at how respondents perceive the destination based on their response to key questions.



Perceptual Mapping

Greater Palm Springs' Positioning Opportunities - Likelihood

- Earlier we referenced the trajectory to Greater Palm Springs' ideal image. This is the map that outlines that trajectory.
- The labels on the map correspond to Greater Palm Springs' image based on the level of likelihood to visit Greater Palm Springs (ranging from Not at all Likely to Already Planning a Trip).
- While there isn't a significant gap between those that aren't likely to visit and those that are already planning a trip, those that are more likely/already planning to visit push Greater Palm Springs to the right.
  - This is a trend we will see going forward when looking at other metrics.



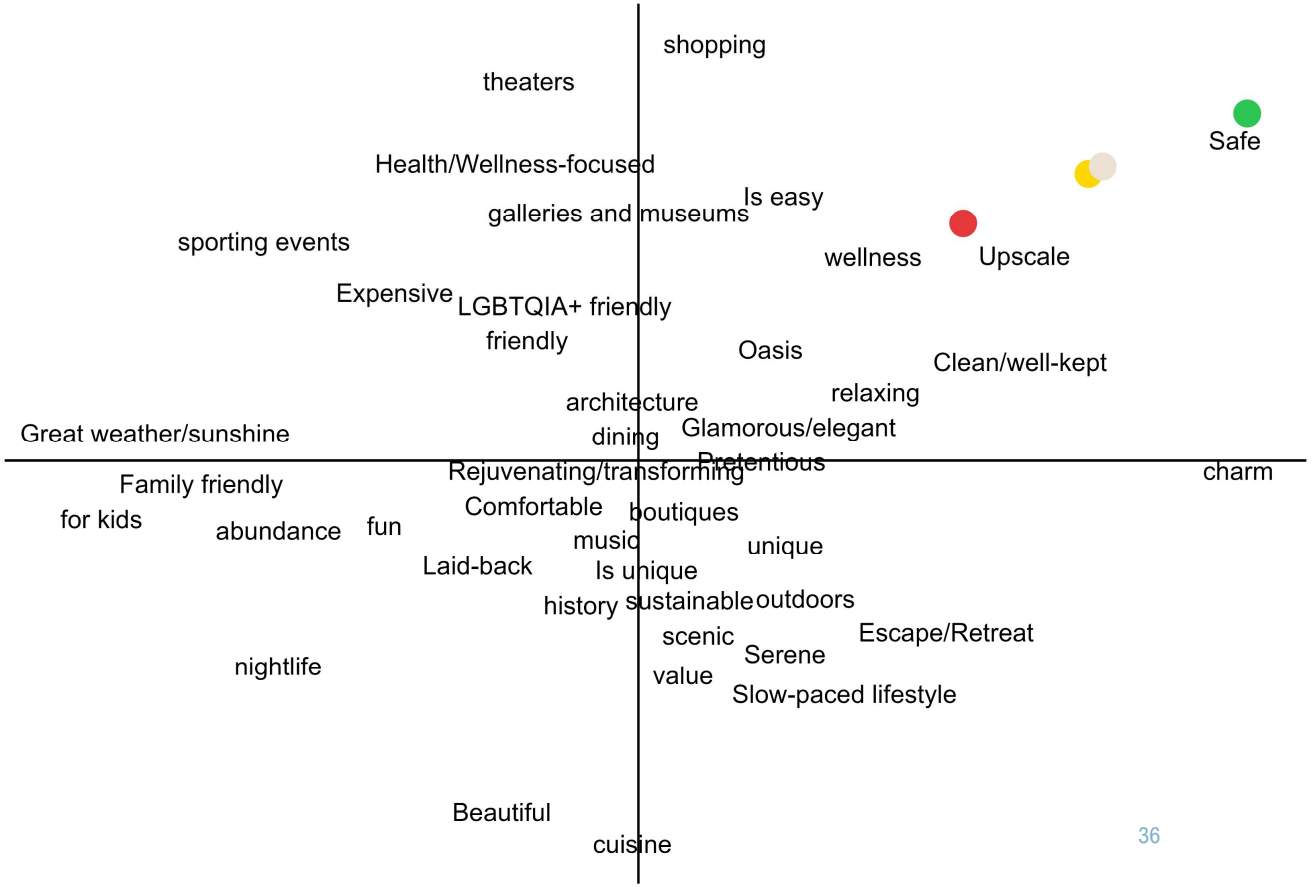
Greater Palm Springs
Not very likely
Very likely
Not at all likely
Somewhat likely
Already planning a trip

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Perceptual Mapping

Greater Palm Springs' Positioning Opportunities - Familiarity

- The labels on this map correspond to Greater Palm Springs' image based on the level of Familiarity with Greater Palm Springs (ranging from Not Very Familiar to Very Familiar).
- The change from the Not Very Familiar position to Very Familiar position is to move up and to the right. In other words:
  - Those that are not very familiar Greater Palm Springs view the destination in a more central location, suggesting that it is less differentiable from other destinations in the competitive set.



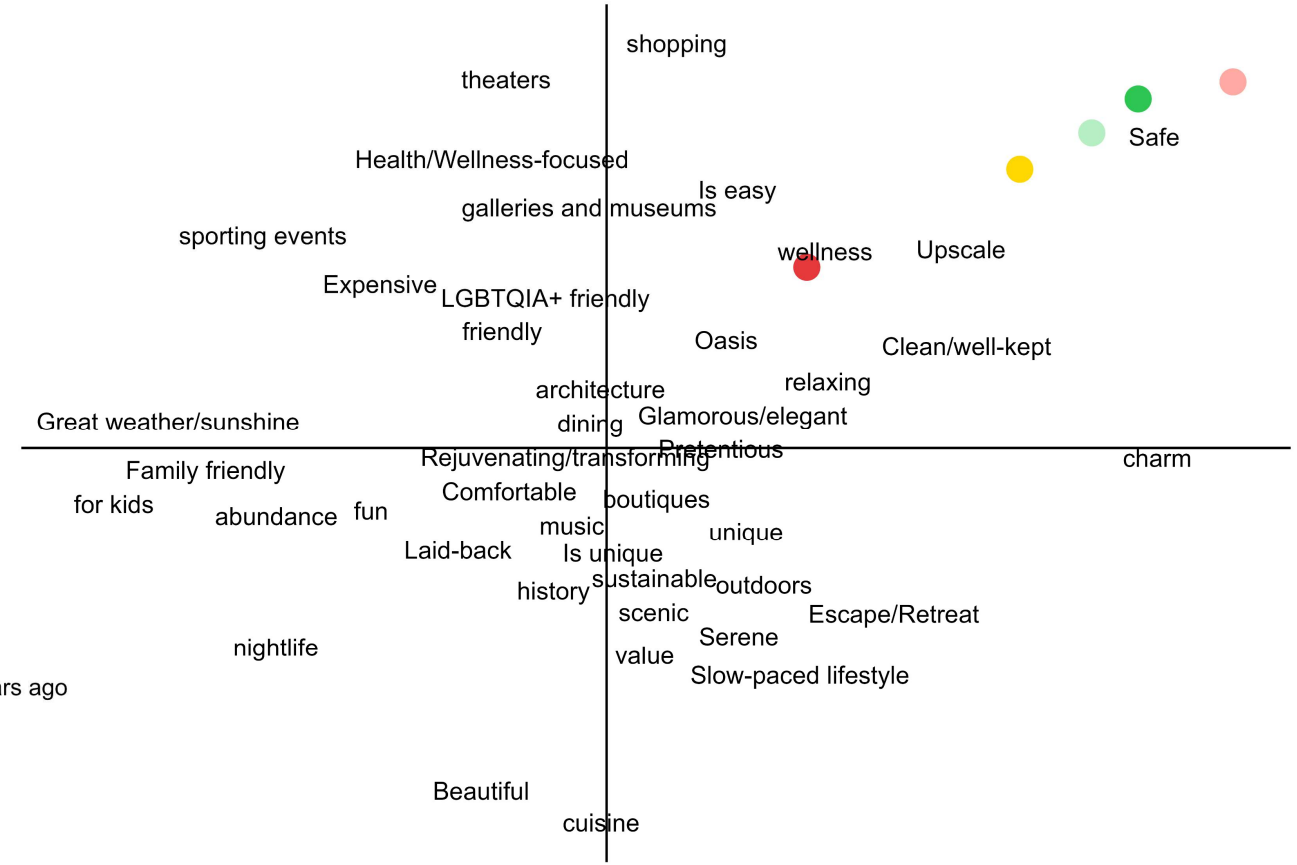
Greater Palm Springs
Not very familiar
Somewhat familiar
Very familiar

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Perceptual Mapping

Greater Palm Springs' Positioning Opportunities - Past Visitation

- The labels on this map correspond to Greater Palm Springs' image based on consumers' past visitation to Greater Palm Springs (ranging from Never Visited to Visited in the past year).
- Here we can see that the perception of all past visitors place Greater Palm Springs up and to the right of its overall location.
- Like those who were unfamiliar with the destination, those who have never visited Greater Palm Springs see the destination in a more central, less differentiated position.
- The goal of this exercise is to find ways in which Greater Palm Springs can differentiate itself from the competitive set in a positive way.
  - The results show that the strongest Greater Palm Springs image is to strengthen and lean into the attributes that already differentiate Greater Palm Springs such as safe, upscale, oasis, clean, and elegant.



Greater Palm Springs · I've never visited · More than 5 years ago · 2-5 years ago · In the past year

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Advertising Awareness & Influence

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Overall Results

- Overall, the fall and winter campaign outperformed industry averages, generating a return on investment that is nearly three times higher than the industry average and is nearly twice as efficient at reaching targeted consumers than average.
- Among domestic consumers who anticipate traveling less within the U.S., the top six reasons cited were all related to economic and political pressures. Even so, 32% of domestic travelers in the Visit Greater Palm Springs (VGPS) target markets still anticipate taking more overnight trips in the coming year, compared to last year.
- The VGPS creative was most successful at communicating the message that Greater Palm Springs is a “place where I can relax and rejuvenate.”

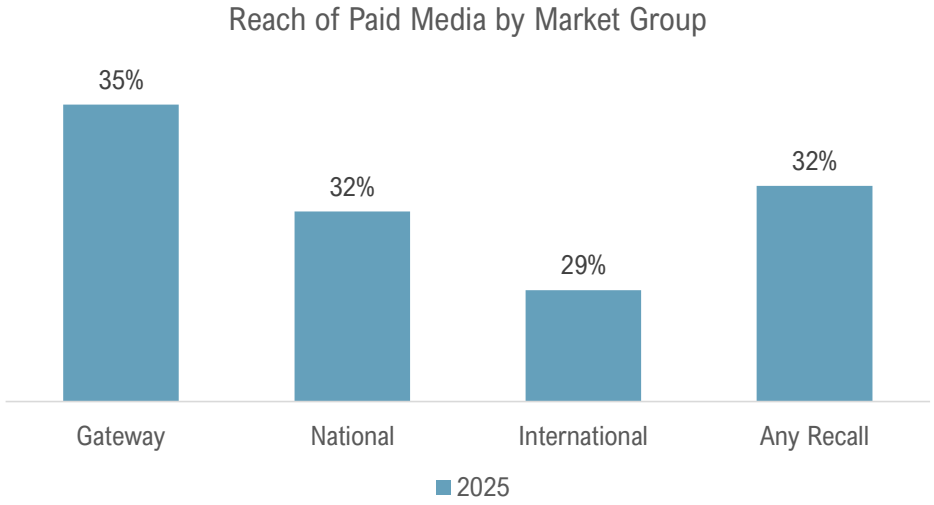
Advertising Awareness & Influence

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Recall of the Advertising

- The $2.4 million invested in the Fall and Winter campaigns reached nearly 12 million targeted consumers, making the effort more efficient than the industry average. For other DMOs spending similarly to Visit Great Palm Springs, the average to cost reach a household is $0.39. With a cost per aware household of just $0.20, the paid media is more efficient than average.

SMARInsights' Cost per Aware HH Benchmark: **$0.39**



	2024/25 Fall & Winter Campaign
Targeted HHs	36,207,616
Awareness	32.4%
Aware HHs	11,732,907
Media Spending	$2,400,000
Cost per Aware HH	$0.20

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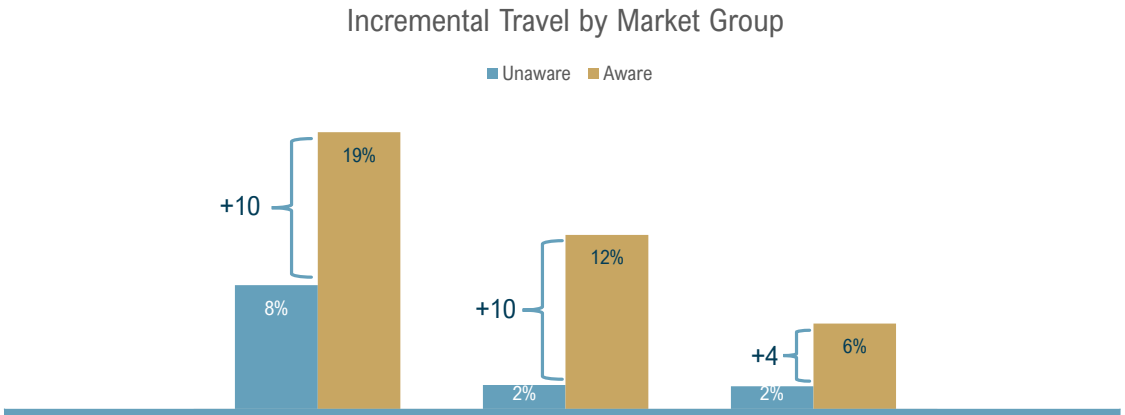
Incremental Travel Overview

- While there are a number of ways for destination marketing to influence consumers, the primary purpose of the Visit Greater Palm Springs paid media is to generate travel to the area.
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to Greater Palm Springs even without any paid advertising. Thus, not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among unaware households is considered the base and what the area would see without the marketing campaign. Accordingly, any travel above that base by ad-aware households is what is considered influenced. As such, this is a conservative measure of influence.



Influence on Travel

- Visit Greater Palm Springs' paid media investment generated nearly 1.2 million consumer overnight trips to the area throughout 2025, with more than two-thirds of those trips from the National/Fly Markets.
- Often, DMOs have a difficult time generating additional influence, especially overnight influence, in nearby markets with high rates of latent (unaware) travel. However, the influence is strong in both the Gateway/Drive and National/Fly markets.
- Canada has been an especially difficult market for U.S. destinations in 2025 given the current political environment. So, a small travel increment with a low number of influenced trips from the International markets is unsurprising.



	Gateway	Fly	International	Total
Aware Households	3,418,500	7,864,373	450,033	11,732,907
Increment	10%	10%	4%	10%
Influenced Trips	355,485	804,242	19,163	1,178,890

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Year-Over-Year Influence

- With average trip spending over $2,000, the Fall and Winter paid media investment influenced more than $2.4 billion in total visitor spending to the Greater Palm Springs area throughout 2025. SMARInsights conducts similar research for numerous other destination marketing organizations and sees an average ROI of $379 for other DMOs spending similarly, making the campaign far more productive an average.

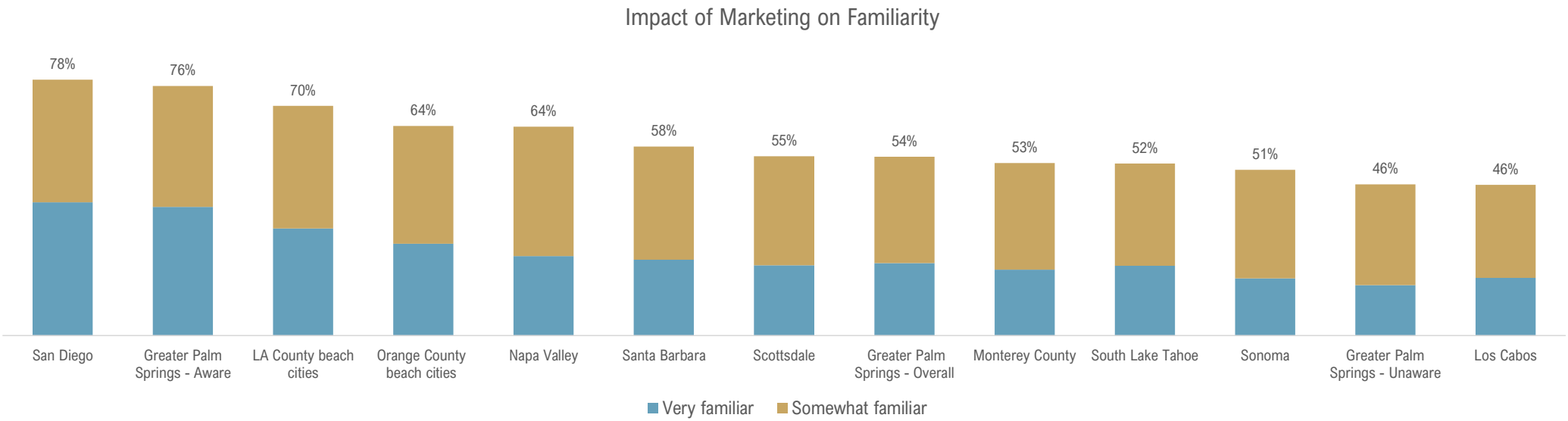
	2025 Influence
Traveling households	36,207,616
Awareness	32.4%
Aware households	11,732,907
Incremental Travel	10%
Incremental trips	1,178,890
Trip spending	$2,043
Total Incremental Spending	$2,408,471,973
Ad spend	$2,400,000
ROI	**$1,004**



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Influence on KPIs
Familiarity

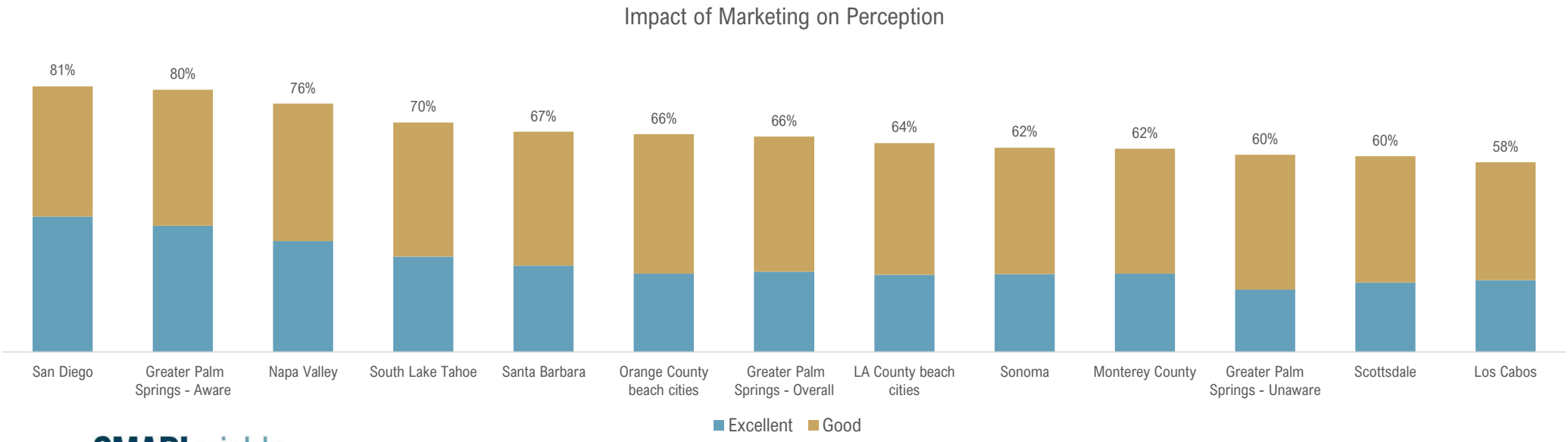
- In addition to generating travel, marketing investment also plays an important role in bringing a destination into consumers' consideration set. This is achieved by influencing three primary destination KPIs: familiarity, perception, and likelihood to visit. Just as with incremental travel, Greater Palm Springs' position with these KPIs by unaware consumers is where the destination would be in the competitive set without any paid investment. Marketing enables destinations to "leap-frog" over competitors.



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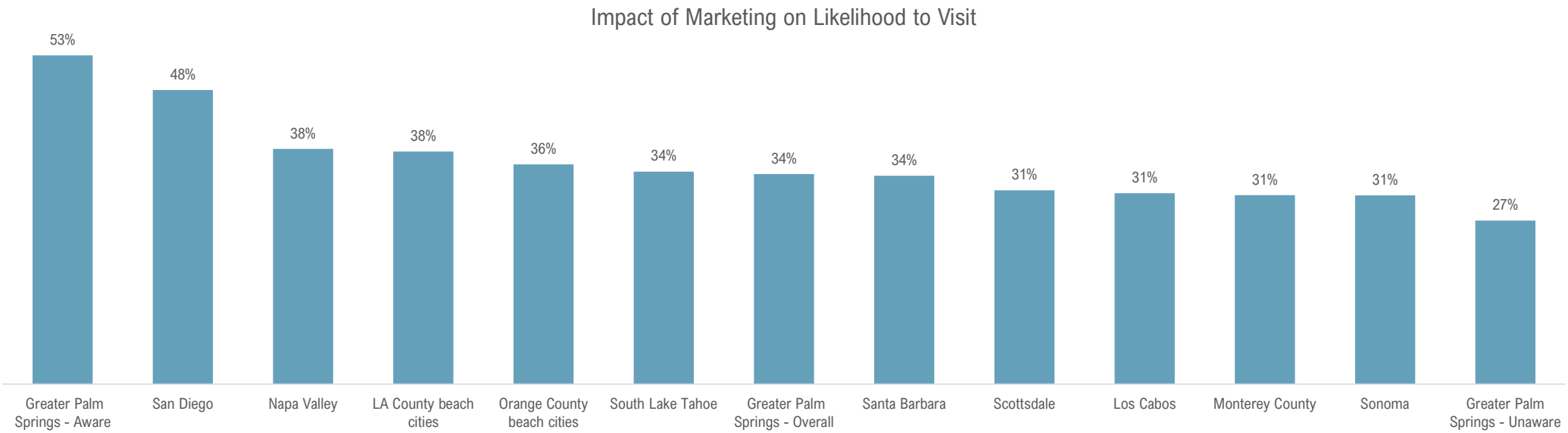
Influence on KPIs
Perception

- Destination marketing KPIs are long-term indicators of influence, whereas incremental travel is a short-term indicator. These KPIs can take years to see sustained movement as a destination builds awareness and continues investment.
- The perception of the Greater Palm Springs area as a good place for a leisure trip is improved considerably by exposure to the organization's paid media, second only to San Diego.



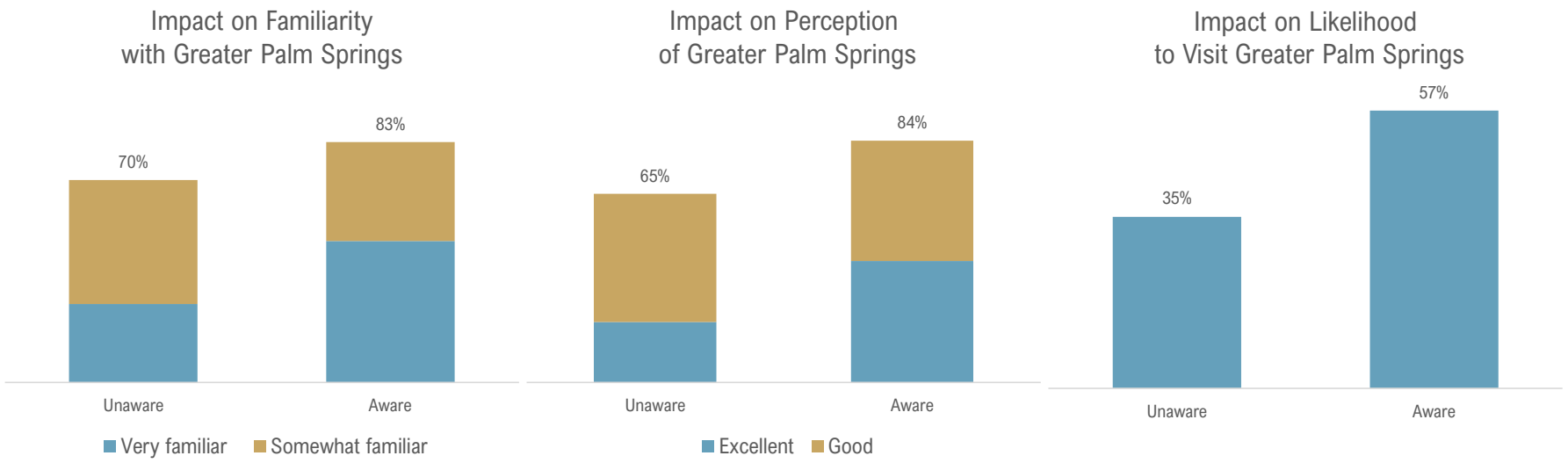
Influence on KPIs
Likelihood to Visit

- The “leap-frogging” influence of paid media on these KPIs is most evident for likelihood to visit, where those unaware of the paid advertising are least likely to consider visiting Greater Palm Springs. However, after exposure to marketing resources, the destination outperforms the entire competitive set.



Influence on KPIs
Gateway/Drive Markets

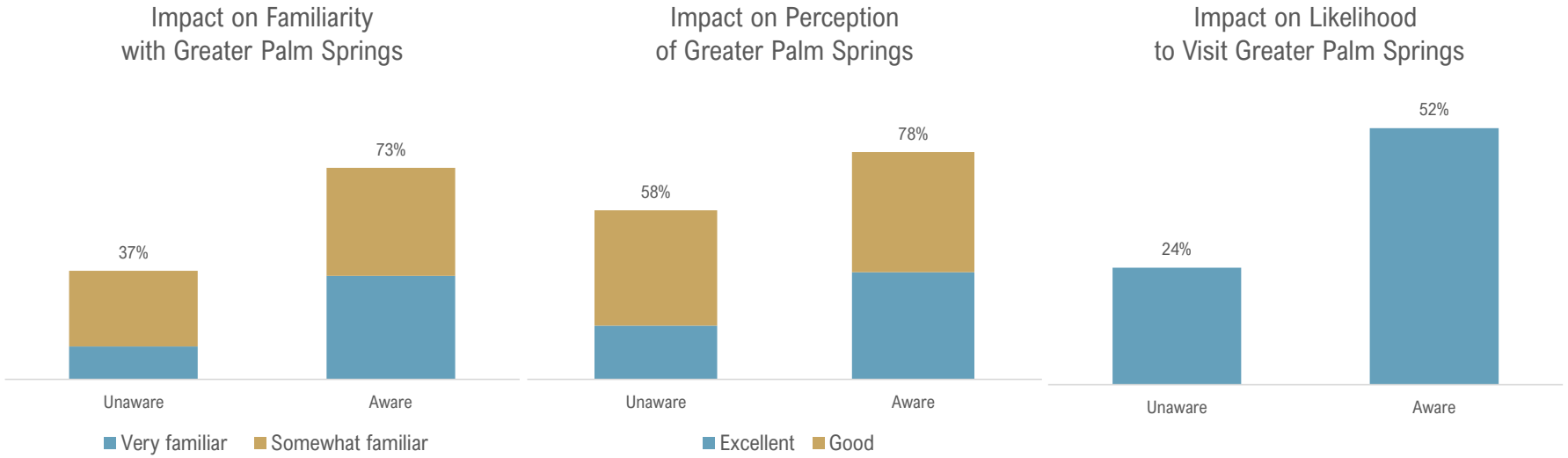
- Though the short-term lift on travel is strong in the Gateway/Drive markets, because the other destination KPIs are so strong, there is little room for additional lift. However, those aware of paid media have even stronger familiarity, perception, and intent to visit Greater Palm Springs in the next year.



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Influence on KPIs
Fly Markets

- With little familiarity in the National/Fly markets, the influence is considerably strong when consumers are aware of the advertising – especially for familiarity and intent to visit.
- It is unusual to see such strong perceptions of a destination with little familiarity among those unaware of the marketing. This speaks to the positive baseline reputation of Greater Palm Springs.

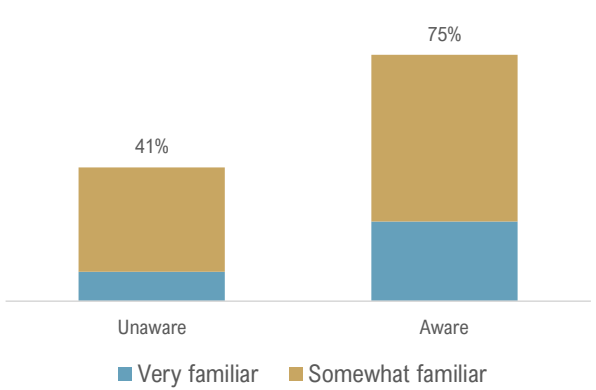


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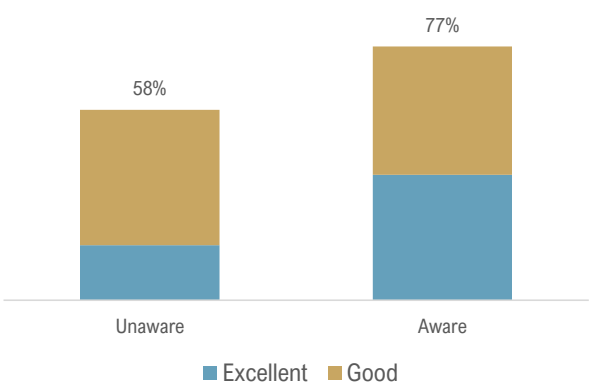
Influence on KPIs
International Markets

- Finally, the International/Canadian markets have very similar familiarity, perception, and intent to visit as other National/Fly markets. Many DMOs are proceeding with caution in Canadian markets in 2026, given anti-American sentiment due to the current political climate.

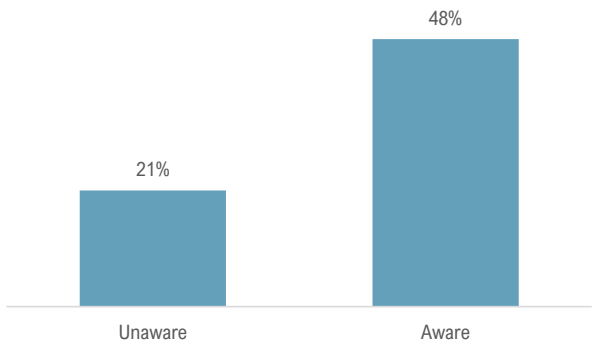
Impact on Familiarity with Greater Palm Springs



Impact on Perception of Greater Palm Springs



Impact on Likelihood to Visit Greater Palm Springs



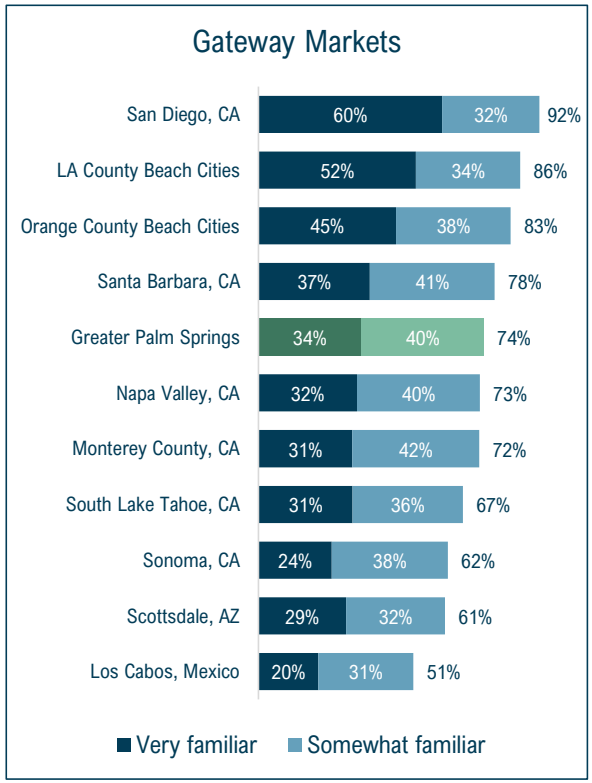
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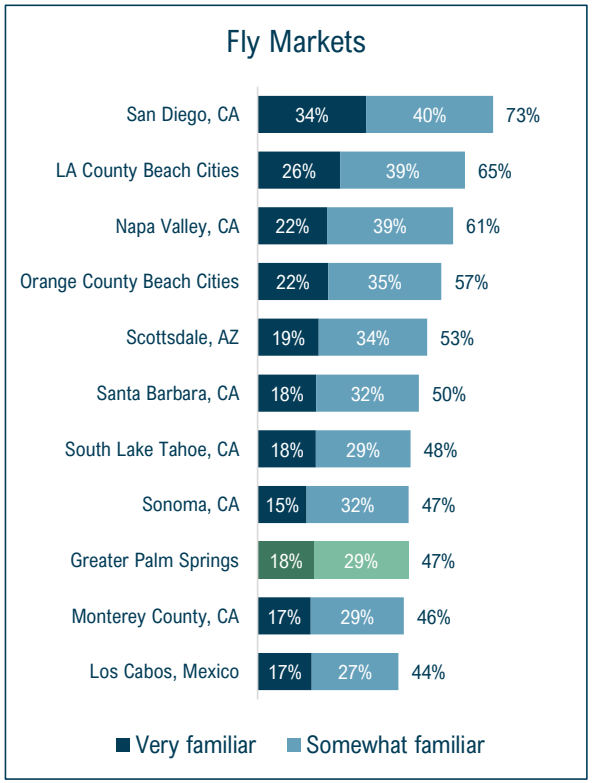
Brand Health

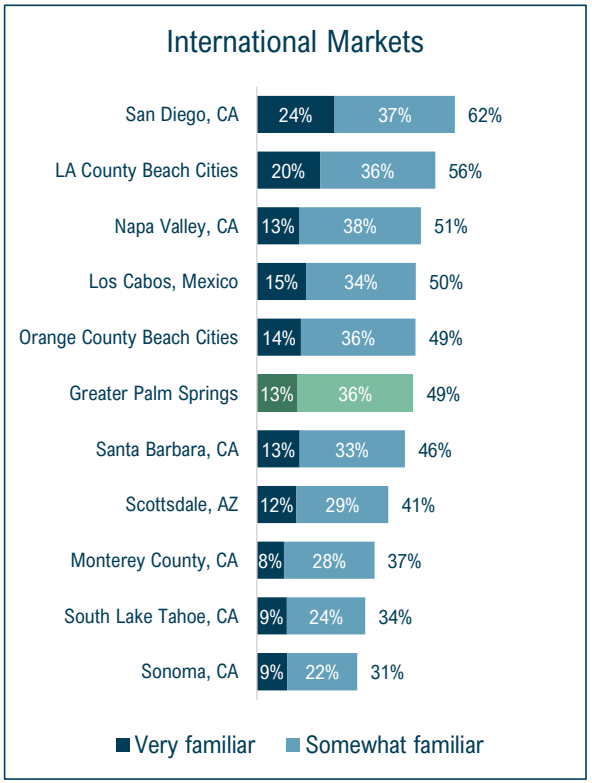
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Key Performance Indicators

Familiarity
Market Group

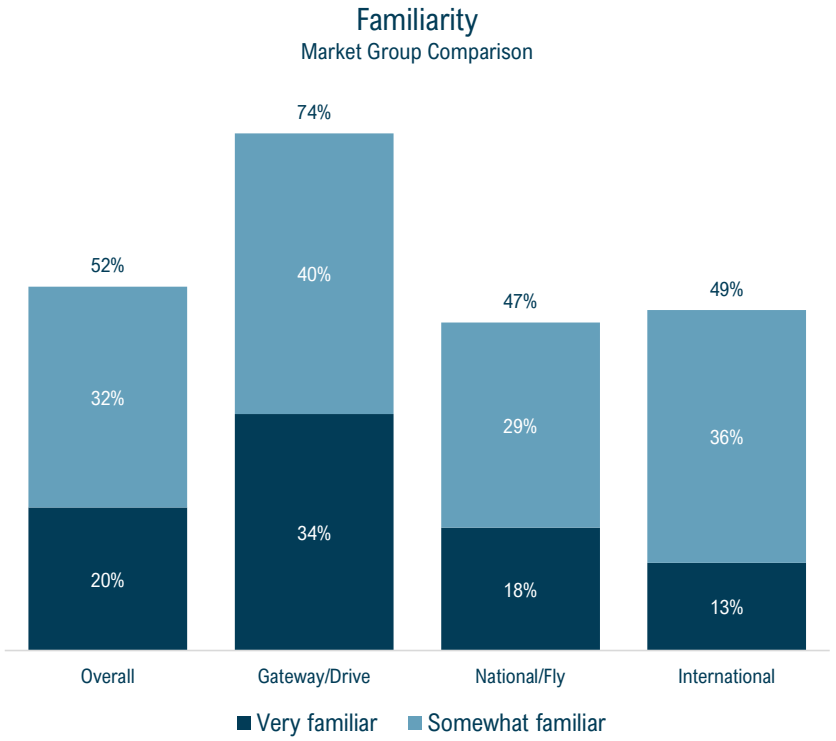






Familiarity with Greater Palm Springs
Market Group Comparison

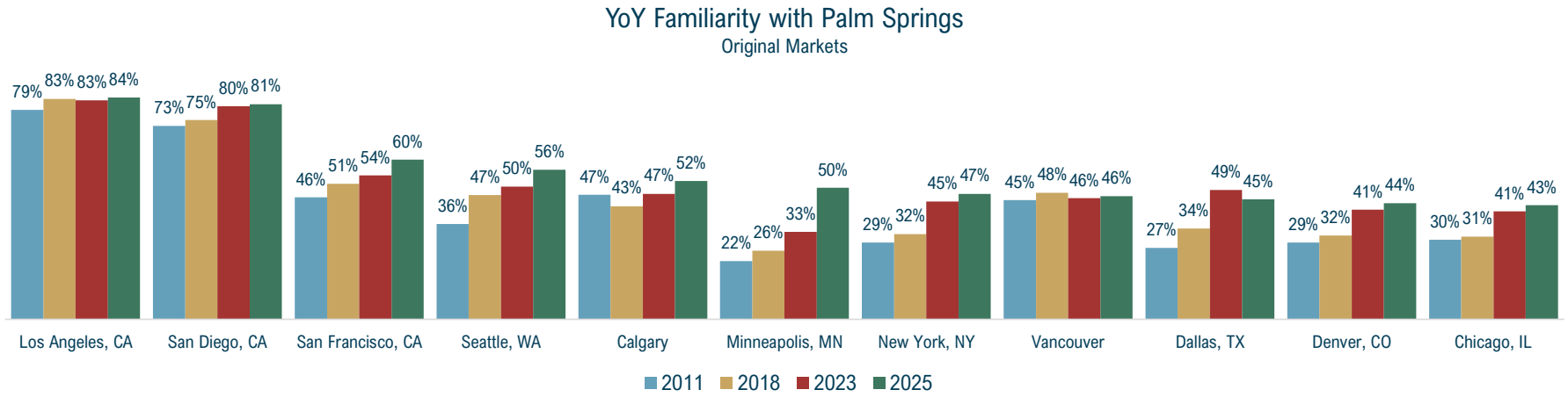
- Just over half of all respondents reported being at least somewhat familiar with Greater Palm Springs.
- Among Gateway markets, 74% of consumers indicated some level of familiarity, unsurprisingly the highest of any market group.
  - Throughout years of research, SMARInsights has found that distance is the primary driver of familiarity.
- International market consumers reported slightly higher familiarity than domestic Fly markets, with both groups falling just below 50%.



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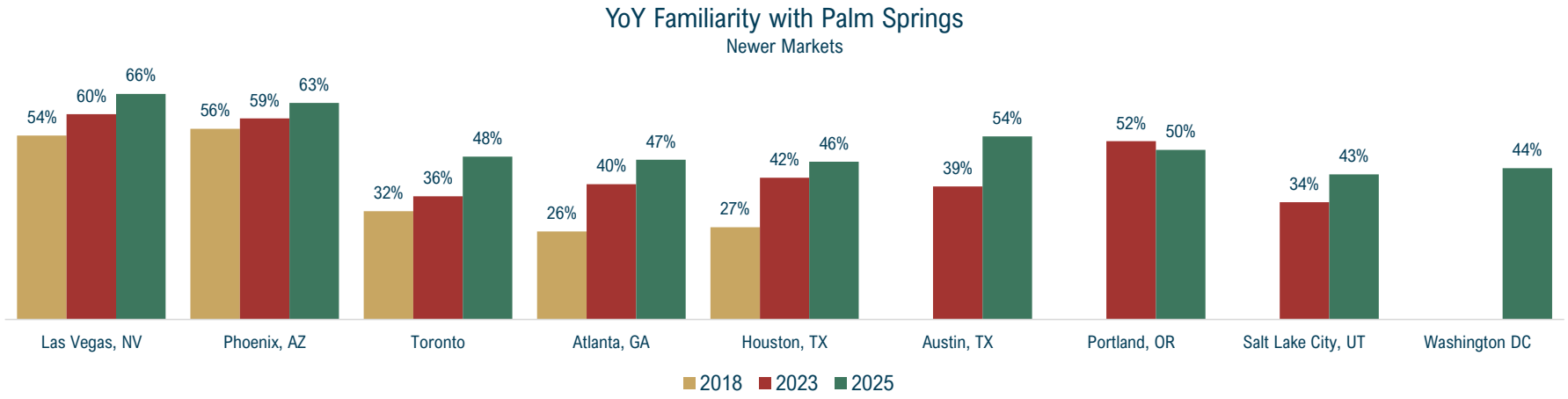
Familiarity with Greater Palm Springs
Year-over-Year Comparison – Original Markets

- Across markets that have seen advertising since 2011, all but one market reported year-over-year increases in familiarity with Greater Palm Springs.
  - Dallas, TX was the lone market to see a decrease in familiarity with Greater Palm Springs as a leisure destination, as familiarity levels in this market dropped from 49% to 45%.
- While the closest markets reported the highest levels of familiarity, some more distant markets saw the biggest increases in familiarity compared to the study done in 2023.
  - Minneapolis, MN: 17%-point increase | Seattle, WA: 6%-point increase | Calgary: 5%-point increase



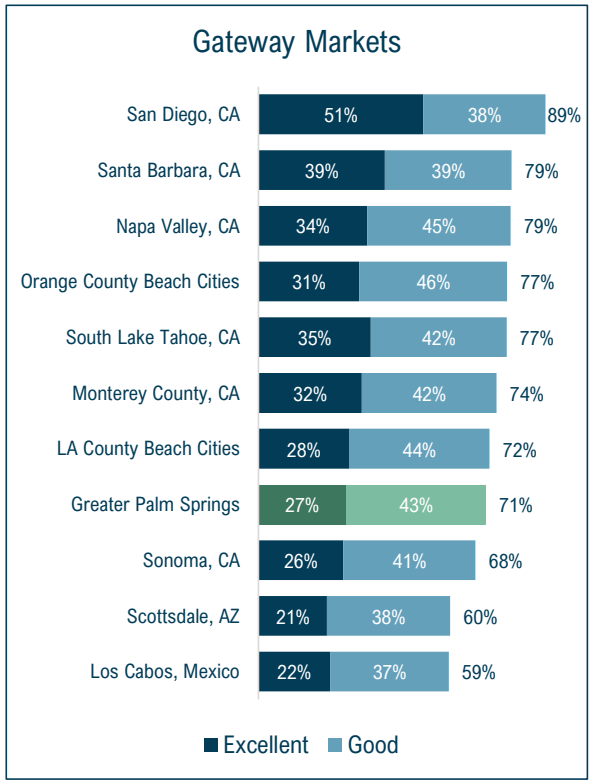
Familiarity with Greater Palm Springs
Year-over-Year Comparison – Newer Markets

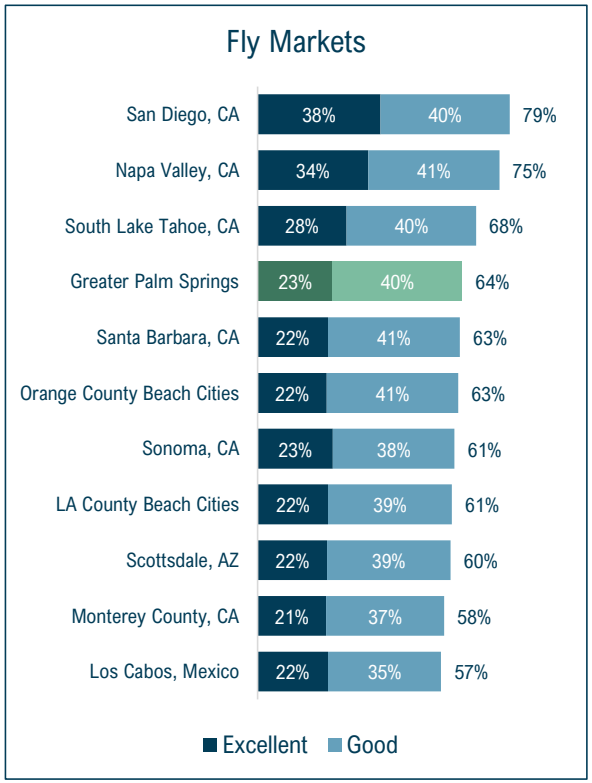
- Familiarity in markets more recently added to the advertising pool saw increases in familiarity compared to the most recent studies.
  - Portland, OR was the lone market to see a decrease in familiarity compared to its most recent study, as it dropped from 52% in 2023 to 50% in 2025.
- Despite being included for the first time in 2025, 44% of consumers in Washington, D.C. reported being familiar with Greater Palm Springs as a leisure destination. This is significantly higher than many other domestic fly markets reported in their first year.

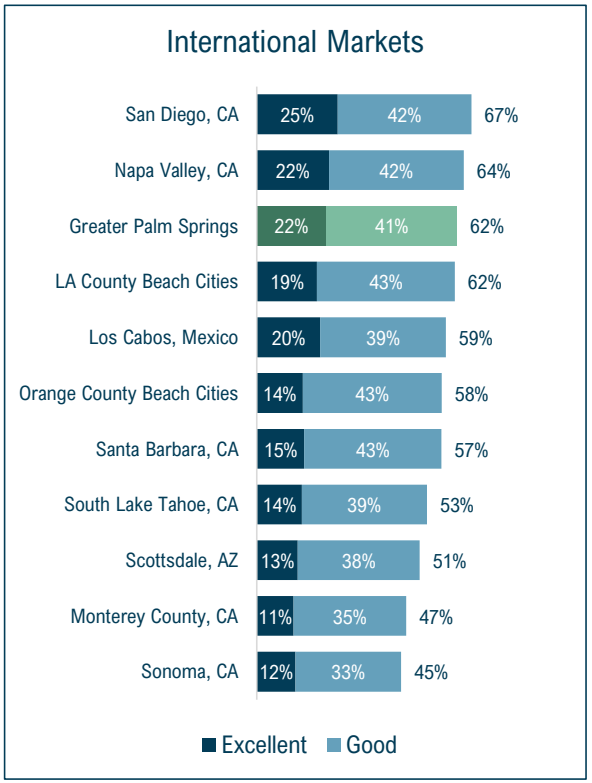


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Destination Perception
Market Group



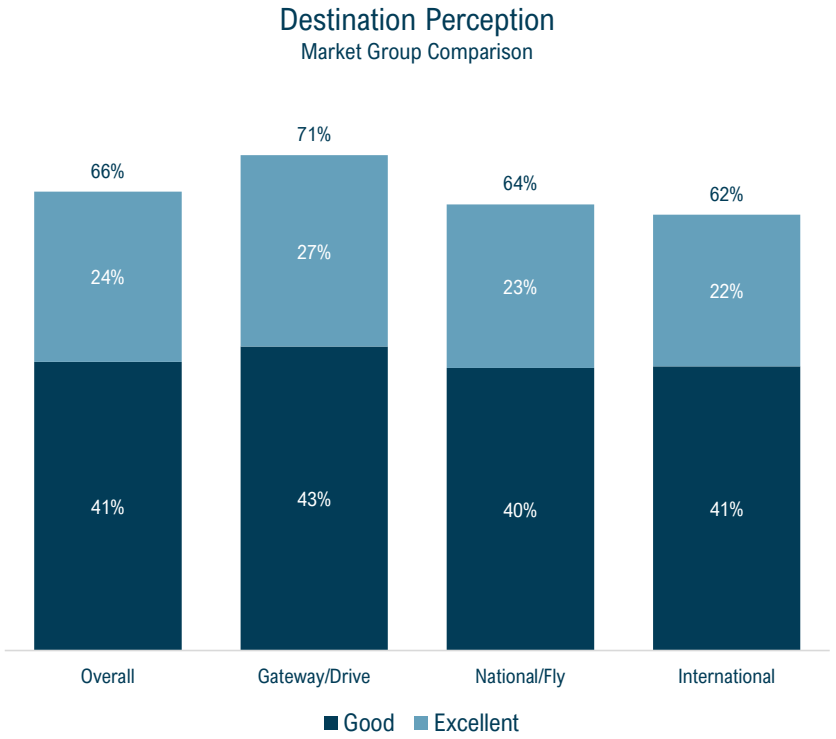




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Destination Perception
Market Group Comparison

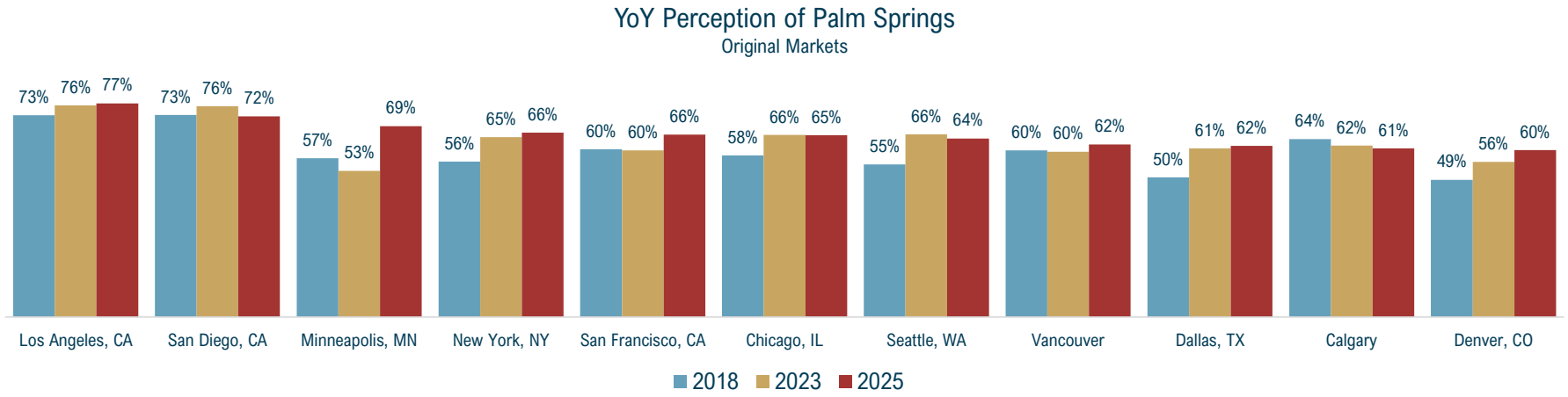
- Two-thirds of all respondents rated Greater Palm Springs as a *"Good"* or *"Excellent"* destination for a leisure trip.
- This perception was highest among Gateway markets, where 71% of respondents gave a positive rating, an expected outcome given their higher familiarity with the destination.
- Although domestic Fly market consumers were slightly less familiar with Greater Palm Springs than international consumers, they reported a stronger perception of the destination.
  - The slightly lower perception among international travelers may reflect broader negative sentiments toward the United States as a whole due to the current political climate.
  - Greater Palm Springs ranks 3rd in destination perception for International markets, 4th for Fly markets, and 8th for Drive markets.



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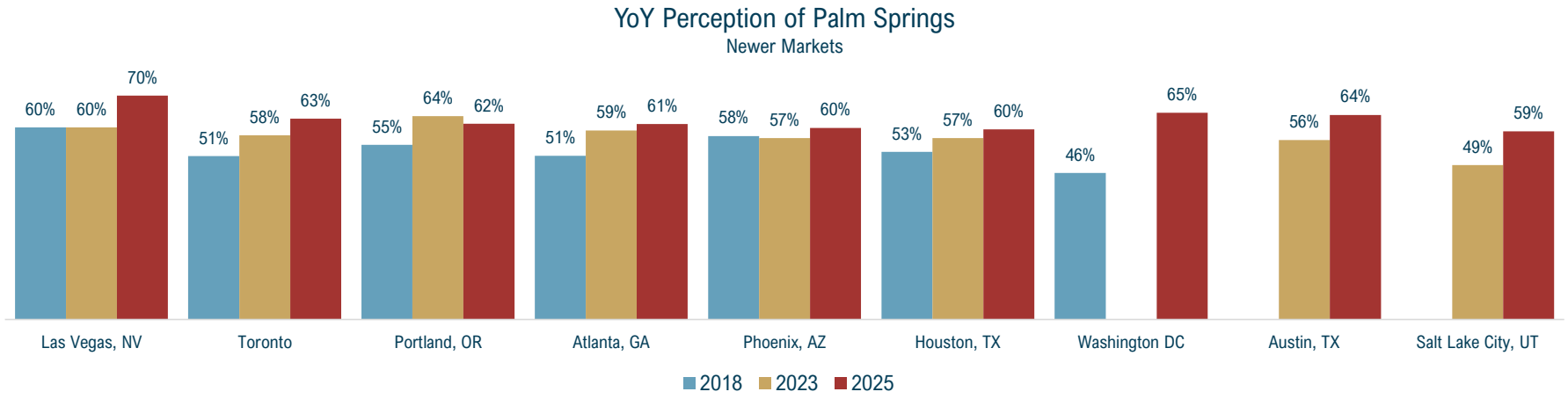
Perception of Greater Palm Springs
Year-over-Year Comparison – Original Markets

- The perception of Greater Palm Springs as a leisure destination did not drastically change across most markets. This behavior is expected as it often takes a significant amount of time to change the perception of a destination.
- While the two closest California markets have the most positive perception of Greater Palm Springs, the next two markets, Minneapolis and New York, are domestic fly markets, which are significantly further from the destination than other California markets.
  - This is significant as perception is often closely related to a consumer's familiarity with the destination and San Franciso consumers reported familiarity levels (see slide 28) much higher than either Minneapolis or New York consumers.

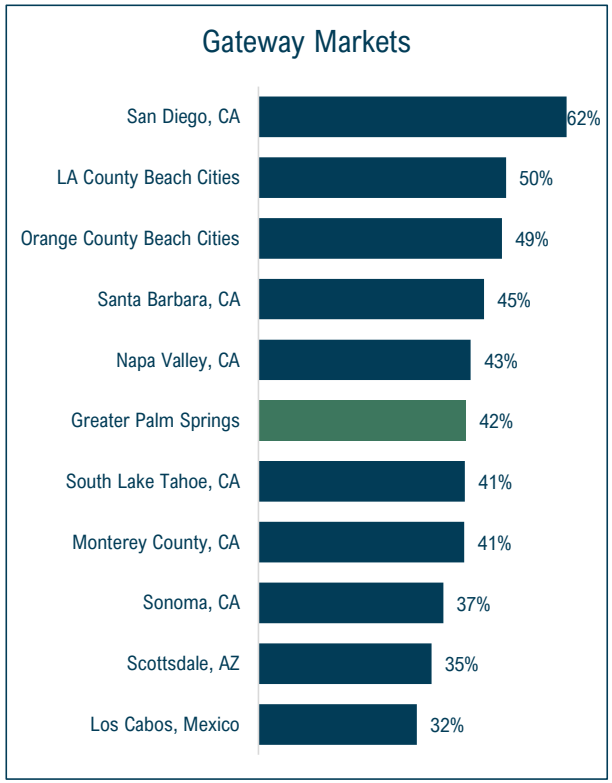


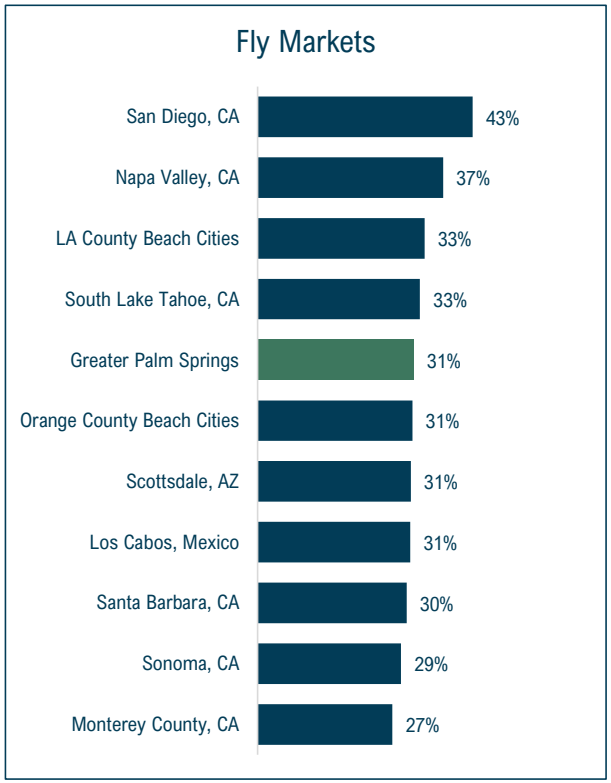
Perception of Greater Palm Springs
Year-over-Year Comparison – Newer Markets

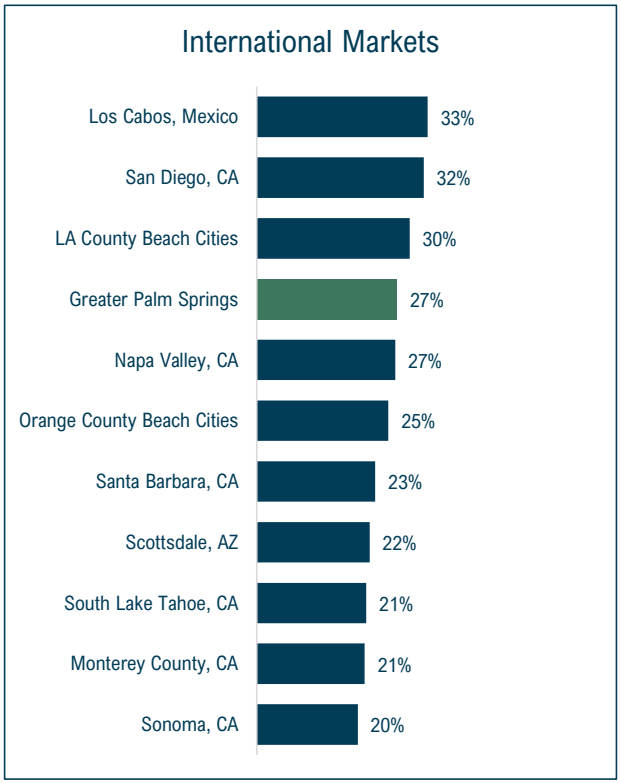
- Markets that have more recently started receiving Greater Palm Springs advertising have seen the most significant increases in their perception of Greater Palm Springs.
- Positive perception often takes many years to see improvement. So, while there is little change from 2023 in most markets, there are strong gains since 2018 when Greater Palm Springs began expanding its marketing.
  - Absence of data for Washington, D.C. (2023), Austin (2018), and Salt Lake City (2018) reflects that no data was captured for those years.



Likelihood to Visit
Market Group vs Competitive Set



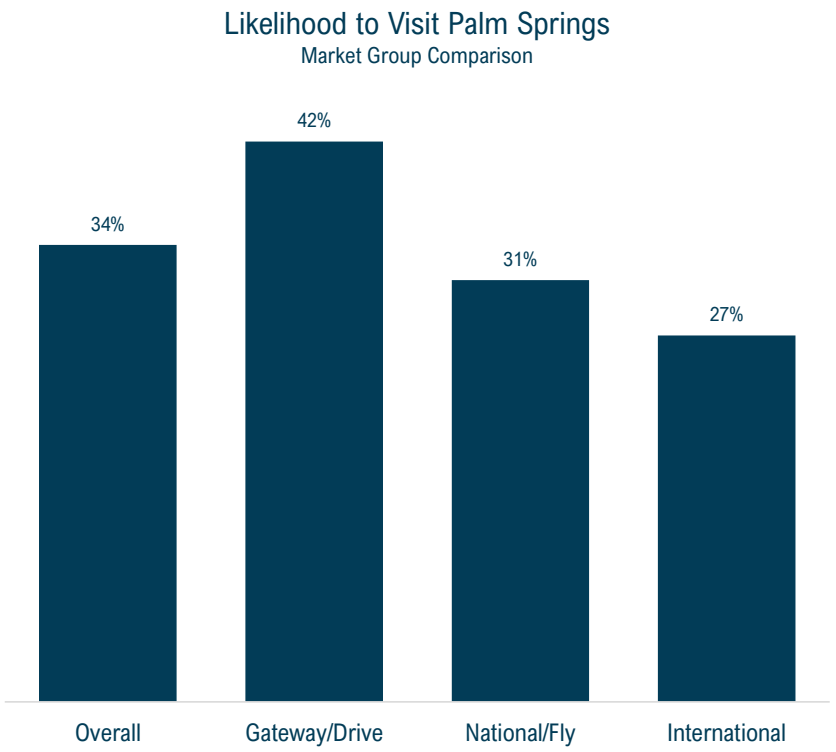




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Likelihood to Visit
Market Group Comparison

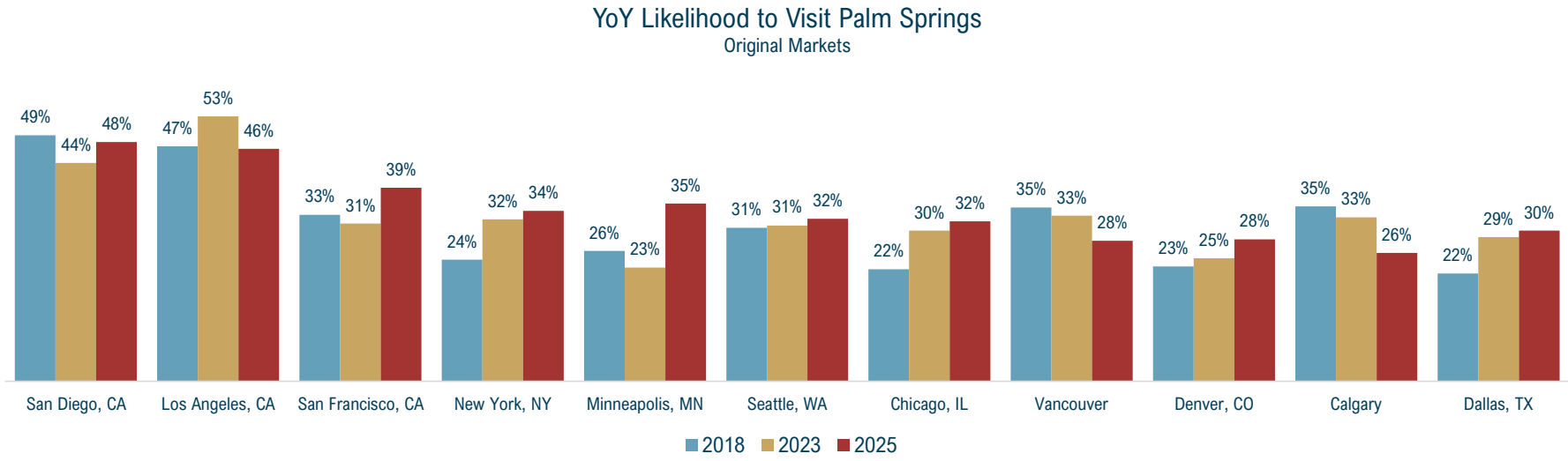
- Just over one-third of all respondents reported likelihood to visit Greater Palm Springs in the next 12 months.
- 42% of Gateway market consumers indicated that they were likely to visit in the next 12 months, unsurprisingly the highest of any market group.
  - Not only is distance the primary driver of familiarity, but it is also the best predictor of future travel.
- Despite other factors indicating that the likelihood to visit for international and domestic Fly market consumers should be very similar, there is a slight gap.
  - 14% of International consumers reported that they anticipate taking "Less" international leisure trips in the next 12 months, while only 6% of domestic Fly market consumers reported that they anticipate taking fewer domestic leisure overnight trips.
  - Of the International market consumers that said they were going to travel less internationally in the next 12 months, 44% of them cited the current political climate as a key driver for taking fewer trips.
    - The political climate was the second most cited reason for traveling less internationally, only behind the price of airfare. For reference, more people said they were taking fewer international trips due to the political climate than their personal finances.



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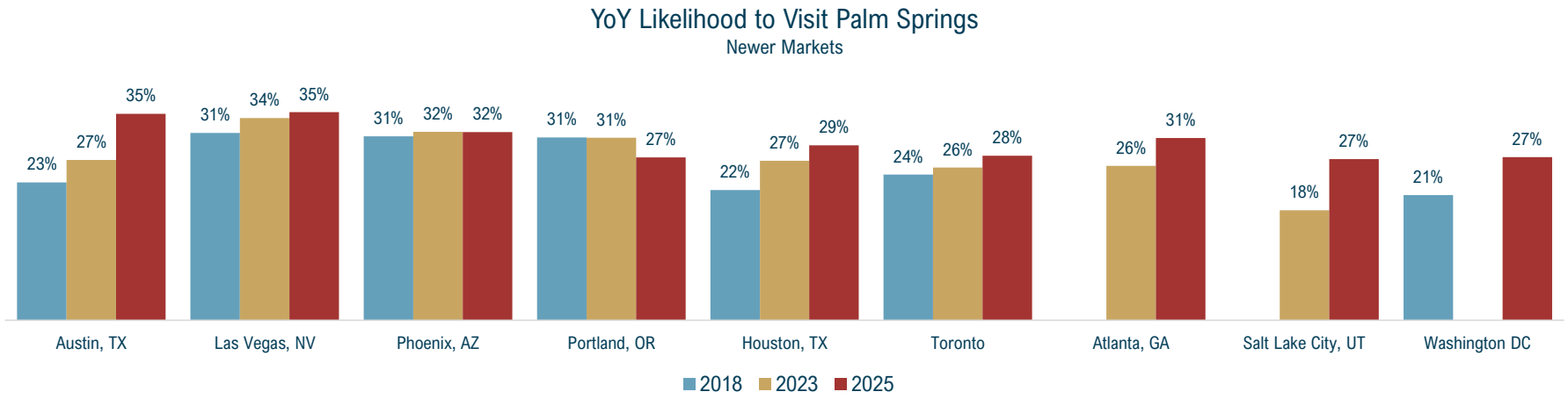
Likelihood to Visit Greater Palm Springs
Year-over-Year Comparison – Original Markets

- Nearby California markets showed the highest likelihood of visiting Greater Palm Springs, followed closely by consumers in New York and Minneapolis, both of which also rated the destination highly as a leisure destination.
- In contrast, international markets such as Vancouver and Calgary experienced significant year-over-year declines in likelihood to visit.



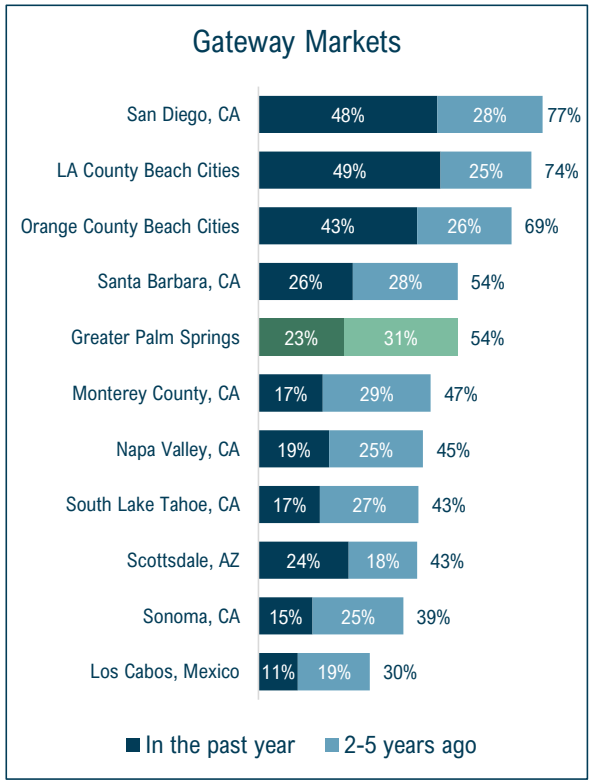
Likelihood to Visit Greater Palm Springs
Year-over-Year Comparison – Newer Markets

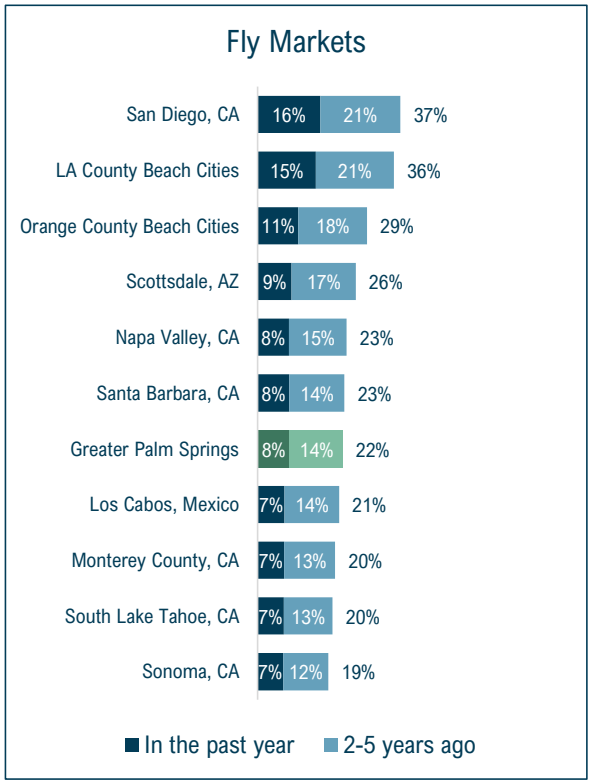
- Likelihood to visit in newer markets generally saw increases.
- Toronto, the largest international market, was the only international market to see an increase compared to prior studies.
  - This is likely due to Toronto consumers being less concerned about key factors that would cause them to travel less, such as the economy, price of travel, and the political climate.
- Portland was the lone market in this group to see a decrease in likelihood to travel. 11% of consumers from this market reported that they anticipate taking fewer domestic overnight trips in the next year. This was the highest percent of any domestic market by 3%.
  - Absence of data for Atlanta (2018), Salt Lake City (2018), and Washington, D.C. (2023) reflects that no data was captured for those years.

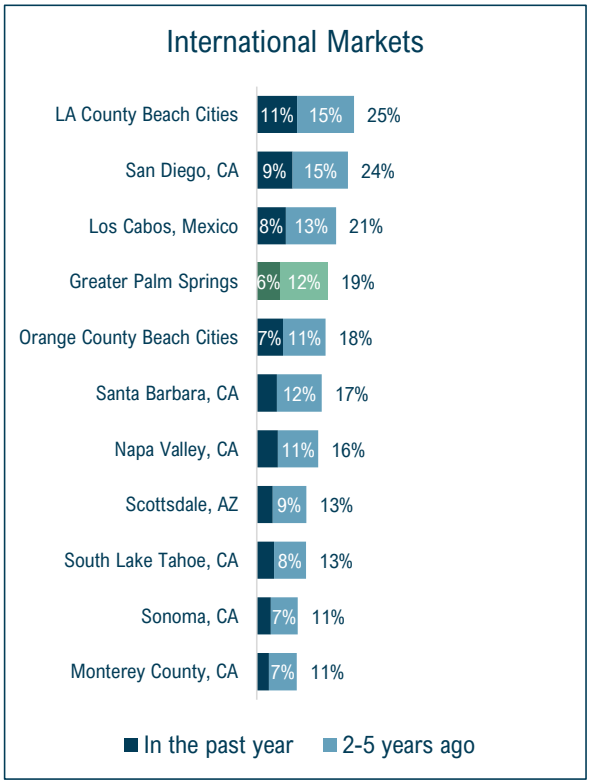


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Past Visitation
Market Group vs Competitive Set



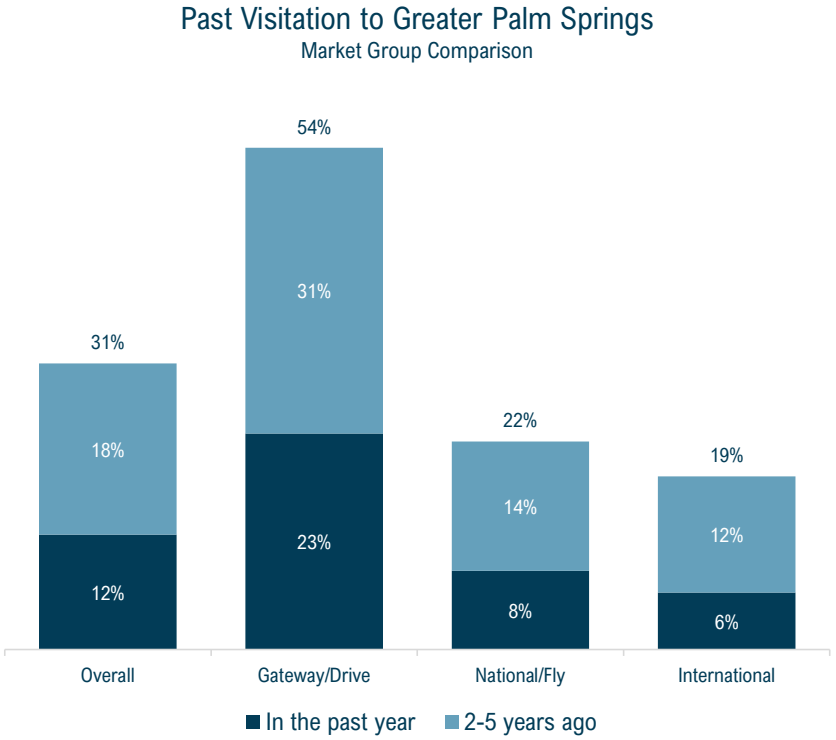




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Past Visitation
Market Group Comparison

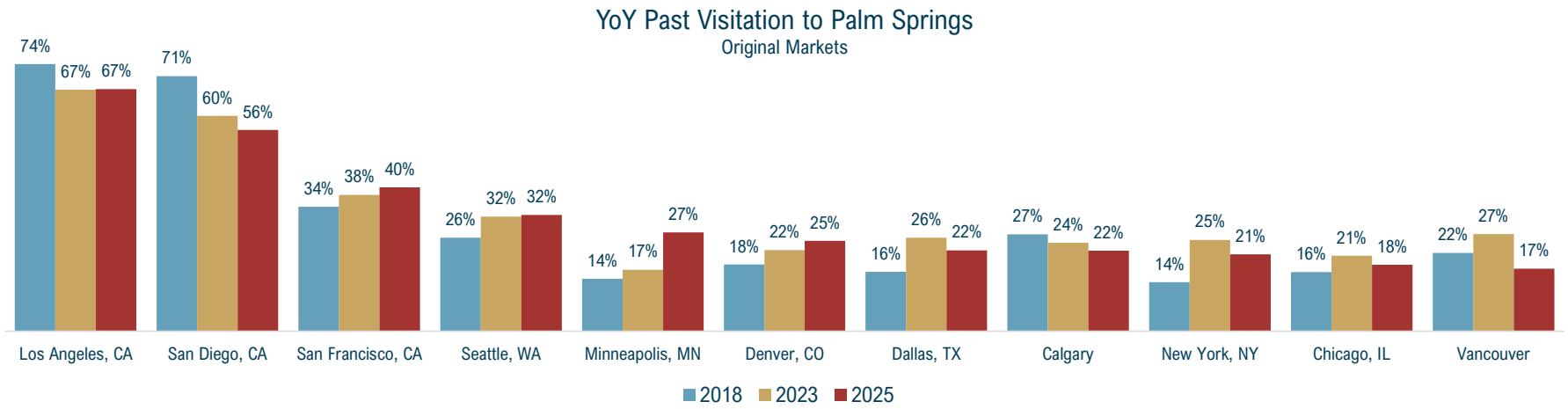
- Just under one-third of all respondents reported taking a trip to Greater Palm Springs in the past five years. 12% of all respondents took a trip to Greater Palm Springs in the past year.
- 54% of Gateway market consumers indicated that they took a trip to Greater Palm Springs in the past five years. Nearly a quarter of consumers from this market group visited in the past year alone.
  - As previously mentioned, this market group standing well above the other two is not shocking, as distance is the best predictor of future travel.
- The City of Palm Springs was the most visited city in the Greater Palm Springs area, as 68% of all visitors reported visiting this city on their trip.
  - Palm Springs was the most visited city for all three market groups, followed by Palm Desert.



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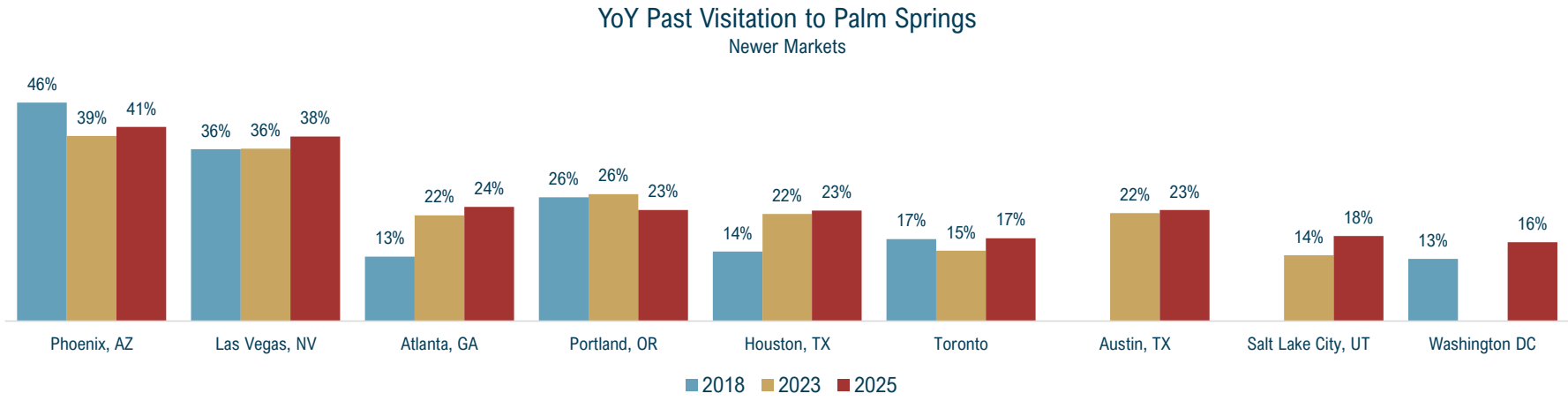
Past Visitation
Year-over-Year Comparison – Original Markets

- San Francisco, Minneapolis, and Denver were the only markets to see year-over-year increases in past visitation. All other markets reported similar or lower levels of previous visitation.
- Due to many factors, including the current political climate, the perception of the US economy, and personal finances, SMARInsights has seen declines in visitation at both the state and DMO level. Certain demographics, such as lower income consumers, have primarily been affected by this trend.



Past Visitation
Year-over-Year Comparison – Newer Markets

- A similar trend appears in newer markets, as past visitation rates across all markets remain consistent with previous years.
- Portland, OR is once again the only market to report a decline, while all other markets experienced a slight increase in past visitation.
  - Absence of data for Austin (2018), Salt Lake City (2018), and Washington, D.C. (2023) reflects that no data was captured for those years.



Destination Image

Product Attribute Ratings
Overall + Market Group

>= 4.0 Excellent (Top 10%)	3.99 – 3.75 Good (Top 25%)	3.74 – 3.5 Average	< 3.5 Below Average

SMARInsights Destination Ratings Benchmarks

- The prevailing image of Greater Palm Springs is one of natural beauty and scenic landscapes.
- After measuring the perception of hundreds of destinations, SMARInsights has developed benchmarks for product ratings. On a 5-point scale, the average rating is between 3.5-3.75.
- While many Greater Palm Springs attributes fall in this range, a handful are considered in the top 25% of all destinations, including being a good place for the outdoors, health and wellness, and dining and shopping.
- Greater Palm Springs scores below average for being a good value and a place for families.

Product Attribute Ratings	Overall	Gateway/Drive	National/Fly	International
Has natural beauty/scenic landscape	4.03	4.06	4.05	3.93
Has a relaxing atmosphere	3.97	4.06	3.97	3.84
Has desirable dining options	3.91	3.95	3.93	3.79
Has many local and independent shops or boutiques	3.90	3.98	3.91	3.76
Is a great place for a health and wellness trip	3.86	3.94	3.87	3.71
Is a fun place to visit	3.85	3.87	3.86	3.79
Is a friendly and welcoming place	3.83	3.94	3.82	3.71
Is a good place for exploring the outdoors	3.82	3.84	3.83	3.78
Is easy to navigate/get around once I am there	3.77	3.95	3.73	3.62
Offers lots to see and do	3.75	3.72	3.77	3.77
Is unique from other communities/places	3.72	3.81	3.73	3.57
Has a rich history	3.68	3.77	3.69	3.52
Has outlet/mall shopping	3.67	3.79	3.61	3.66
Has great nightlife and bars	3.65	3.67	3.67	3.58
Has interesting architecture	3.64	3.71	3.65	3.51
Is a unique vacation experience you can't get anywhere else	3.59	3.62	3.60	3.49
Has performing arts or theaters	3.57	3.61	3.59	3.47
Has an abundance of art galleries and museums	3.57	3.65	3.57	3.44
Has small-town charm	3.55	3.71	3.51	3.45
Has iconic or unique cuisine	3.55	3.55	3.58	3.47
Is a sustainable destination	3.53	3.62	3.52	3.42
Is a great place for live music	3.53	3.54	3.53	3.50
Is a good value for the money	3.39	3.52	3.35	3.31
Has many attractions for kids	3.19	3.10	3.21	3.30
Is a great place for sporting events	3.18	3.11	3.18	3.31

SMARInsights

Product Attribute Ratings
Year-over-Year

>= 4.0 Excellent (Top 10%)	3.99 – 3.75 Good (Top 25%)	3.74 – 3.5 Average	< 3.5 Below Average

SMARInsights Destination Ratings Benchmarks

- There has been improvement on a number of product attributes since the last evaluation in 2023. Most notably, there have been strong gains for the area's scenic beauty and being a good place for exploring the outdoors.
- Encouragingly, the attribute for lots to see and do has moved from average to the top 25% over the last seven years.
- Even with a focus on including family activities in paid marketing, having attractions for kids remains one of the lowest rated product attributes, and rates below average.

Product Attribute Ratings	2018	2023	2025	Diff
Has natural beauty/scenic landscape	3.96	3.99	4.03	0.04
Has a relaxing atmosphere	4.01	3.95	3.97	0.02
Has desirable dining options		3.90	3.91	0.01
Has many local and independent shops or boutiques		3.86	3.90	0.04
Is a great place for a health and wellness trip	3.82	3.84	3.86	0.02
Is a fun place to visit		3.86	3.85	-0.01
Is a friendly and welcoming place		3.82	3.83	0.01
Is a good place for exploring the outdoors		3.77	3.82	0.05
Is easy to navigate/get around once I am there	3.81	3.76	3.77	0.01
Offers lots to see and do	3.54	3.72	3.75	0.03
Is unique from other communities/places		3.71	3.72	0.01
Has a rich history		3.64	3.68	0.04
Has outlet/mall shopping		3.67	3.67	0.00
Has great nightlife and bars		3.66	3.65	-0.01
Has interesting architecture		3.61	3.64	0.03
Is a unique vacation experience you can't get anywhere else		3.56	3.59	0.03
Has performing arts or theaters		3.53	3.57	0.04
Has an abundance of art galleries and museums		3.54	3.57	0.03
Has small-town charm		3.54	3.55	0.01
Has iconic or unique cuisine		3.54	3.55	0.01
Is a sustainable destination		3.53	3.53	0.00
Is a great place for live music		3.52	3.53	0.01
Is a good value for the money	3.35	3.40	3.39	-0.01
Has many attractions for kids		3.20	3.19	-0.01
Is a great place for sporting events		3.20	3.18	-0.02

Competitive Perceptions
Product Attributes vs Competitive Set

- Greater Palm Springs excels when viewed against the rest of the competitive set for product attributes, especially for being a good place for health and wellness and offering a relaxing atmosphere.

	Greater Palm Springs	Monterey County, CA	Orange County Beach Cities	LA County Beach Cities	Santa Barbara, CA	San Diego, CA	Scottsdale, AZ	Napa Valley, CA	Los Cabos, Mexico	Sonoma, CA	South Lake Tahoe, CA
Is a great place for a health and wellness trip	104	99	94	91	99	97	100	97	94	100	101
Has outlet/mall shopping	104	96	102	101	99	105	102	88	91	94	90
Is easy to navigate/get around once I am there	104	101	94	89	100	99	99	98	95	100	100
Has a relaxing atmosphere	103	101	94	88	99	96	96	102	101	100	101
Has small-town charm	103	107	90	83	101	89	97	107	96	107	107
Has interesting architecture	103	100	94	94	101	102	98	95	103	98	92
Has performing arts or theaters	103	100	100	102	100	106	99	93	88	98	91
Has an abundance of art galleries and museums	103	102	97	99	103	104	100	95	89	99	91
Has many local and independent shops or boutiques	102	100	97	97	101	98	98	99	99	99	97
Is a friendly and welcoming place	102	101	95	92	100	102	98	99	100	100	101
Is a good value for the money	102	99	95	91	98	100	101	96	110	100	100
Is a great place for live music	101	99	100	102	99	103	96	95	101	98	95
Is unique from other communities/places	101	101	95	94	98	100	96	105	100	100	103
Has great nightlife and bars	101	96	101	104	99	105	97	91	106	95	95
Has desirable dining options	101	100	99	98	100	102	98	102	98	100	96
Is a sustainable destination	101	103	97	94	100	101	97	101	97	104	102
Is a unique vacation experience you can't get anywhere else	101	101	94	94	97	101	97	106	101	101	106
Has a rich history	101	101	95	96	101	104	96	103	102	100	98
Has natural beauty/scenic landscape	100	102	96	94	98	99	98	102	102	100	108
Is a fun place to visit	100	101	98	96	98	105	96	99	104	98	103
Is a great place for sporting events	100	97	104	108	97	113	104	86	89	94	100
Is a good place for exploring the outdoors	100	102	96	95	99	100	100	100	100	100	111
Has iconic or unique cuisine	100	100	97	98	99	102	97	105	106	103	94
Offers lots to see and do	99	102	99	101	98	108	97	97	101	97	102
Has many attractions for kids	98	103	108	105	101	116	98	86	97	95	103

Personality Attribute Ratings
Overall + Market Group

>= 4.0 Excellent (Top 10%)	3.99 – 3.75 Good (Top 25%)	3.74 – 3.5 Average	< 3.5 Below Average

SMARInsights Destination Ratings Benchmarks

- Reviewing attributes gauges how a place "feels" rather than what it has to offer in terms of product. Overall, the personality of Greater Palm Springs is driven by luxury, with ratings for being beautiful, upscale, and expensive being high.
- Encouragingly, though some of the strongest ratings are for attributes associated with luxury, Greater Palm Springs isn't considered pretentious.
- Often, the most familiar markets give destinations the strongest ratings. However, the strongest image here is in the National/Fly markets.

Personality Attribute Ratings	Overall	Gateway/Drive	National/Fly	International
Great weather/sunshine	4.18	4.12	4.24	4.07
Beautiful	4.03	3.99	4.07	3.95
Upscale	4.00	3.97	4.07	3.82
Expensive	3.96	3.84	4.03	3.90
Clean/well-kept	3.96	4.03	3.96	3.80
Escape/Retreat	3.93	4.02	3.92	3.81
Comfortable	3.89	3.95	3.89	3.81
Safe	3.85	3.99	3.86	3.60
Health/Wellness-focused	3.84	3.88	3.85	3.74
Oasis	3.79	3.85	3.79	3.72
Glamorous/elegant	3.77	3.72	3.83	3.63
Serene	3.75	3.80	3.76	3.63
Rejuvenating/transforming	3.72	3.76	3.73	3.65
Laid-back	3.69	3.82	3.67	3.58
LGBTQIA+ friendly	3.57	3.79	3.54	3.33
Family friendly	3.53	3.56	3.51	3.58
Slow-paced lifestyle	3.51	3.65	3.47	3.43
Pretentious	3.29	3.15	3.39	3.19

Personality Attribute Ratings
Year-over-Year

>= 4.0 Excellent (Top 10%)	3.99 – 3.75 Good (Top 25%)	3.74 – 3.5 Average	< 3.5 Below Average

SMARInsights Destination Ratings Benchmarks

- There have been gains in the last seven years on nearly all of the personality attributes. Though there is little year-over-year change, there is marked improvement on most attributes when taking a longer view.
- The only attribute that has not seen gains in evaluation since 2018 is Greater Palm Springs offering a "slow-paced lifestyle." Given the growth in the area, this is not a primary message for Visit Greater Palm Springs.

Personality Attribute Ratings	2018	2023	2025	Diff
Great weather/sunshine	4.18	4.16	4.18	0.02
Beautiful	3.90	4.02	4.03	0.01
Upscale	3.94	3.98	4.00	0.02
Expensive	3.76	3.89	3.96	0.07
Clean/well-kept	3.93	3.93	3.96	0.03
Escape/Retreat	3.90	3.90	3.93	0.03
Comfortable	3.84	3.87	3.89	0.02
Safe	3.95	3.83	3.85	0.02
Health/Wellness-focused	3.73	3.83	3.84	0.01
Oasis	3.80	3.84	3.79	-0.05
Glamorous/elegant	3.62	3.75	3.77	0.02
Serene	3.72	3.76	3.75	-0.01
Rejuvenating/transforming	3.63	3.74	3.72	-0.02
Laid-back	3.71	3.71	3.69	-0.02
LGBTQIA+ friendly	3.48	3.58	3.57	-0.01
Family friendly	3.41	3.56	3.53	-0.03
Slow-paced lifestyle	3.63	3.52	3.51	-0.01
Pretentious			3.29	NA

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Competitive Perceptions
Brand/Personality Attributes vs Competitive Set

- When compared to its competitive set, Greater Palm Springs stands out for being perceived as an “Oasis,” “Health/Wellness-focused,” and an “Elegant” destination.
- The only attribute where Greater Palm Springs received a below-average rating relative to its competitors was “Family-friendly.” In this category, San Diego and South Lake Tahoe received the highest ratings.
- In terms of overall destination personality, Greater Palm Springs is viewed most similarly to Napa Valley, as both are seen as safe, glamorous, upscale, and clean destinations that offer an escape.
  - However, Greater Palm Springs differentiates itself from Napa Valley by feeling like an Oasis and being focused on Health/Wellness. In contrast, Napa Valley is perceived as more expensive and “pretentious.”

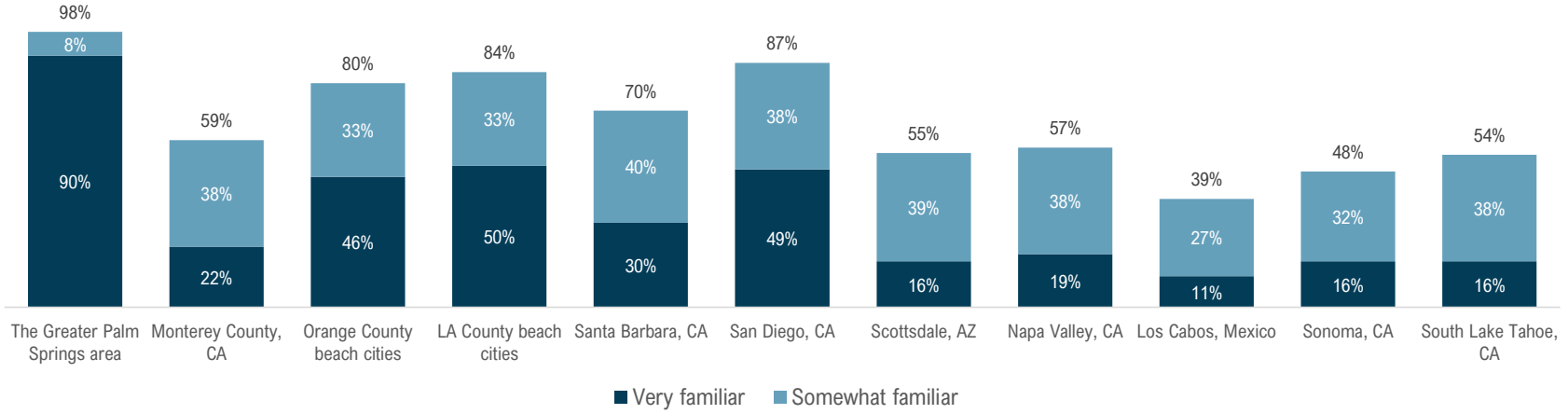
	Greater Palm Springs	Monterey County, CA	Orange County Beach Cities	LA County Beach Cities	Santa Barbara, CA	San Diego, CA	Scottsdale, AZ	Napa Valley, CA	Los Cabos, Mexico	Sonoma, CA	South Lake Tahoe, CA
Oasis	106	98	93	88	97	93	96	98	104	98	100
Health/Wellness-focused	104	99	96	93	99	96	100	95	93	98	101
Safe	104	103	93	84	101	93	100	104	85	104	105
Glamorous/elegant	104	99	96	95	102	94	95	103	92	100	95
Upscale	104	99	98	94	103	95	95	105	87	101	96
Clean/well-kept	104	101	94	84	101	95	101	104	93	102	102
Escape/Retreat	103	101	93	87	98	94	97	103	104	100	106
Slow-paced lifestyle	103	105	91	84	99	90	97	106	104	104	104
LGBTQIA+ friendly	103	99	99	103	103	103	88	98	90	99	95
Rejuvenating/transforming	103	101	95	91	99	96	99	99	101	100	104
Serene	102	103	92	87	100	94	97	105	100	102	108
Laid-back	102	102	94	91	99	97	98	102	104	101	102
Pretentious	102	102	105	103	102	92	95	106	85	100	93
Comfortable	102	101	96	92	100	99	98	100	100	100	102
Expensive	101	102	102	103	103	102	93	104	86	98	98
Great weather/sunshine	101	97	100	101	101	103	97	98	103	98	96
Beautiful	100	103	96	95	101	100	96	103	103	101	107
Family friendly	99	103	104	97	102	108	102	89	98	96	106

Resident Analysis

SMARInsights

Resident Familiarity

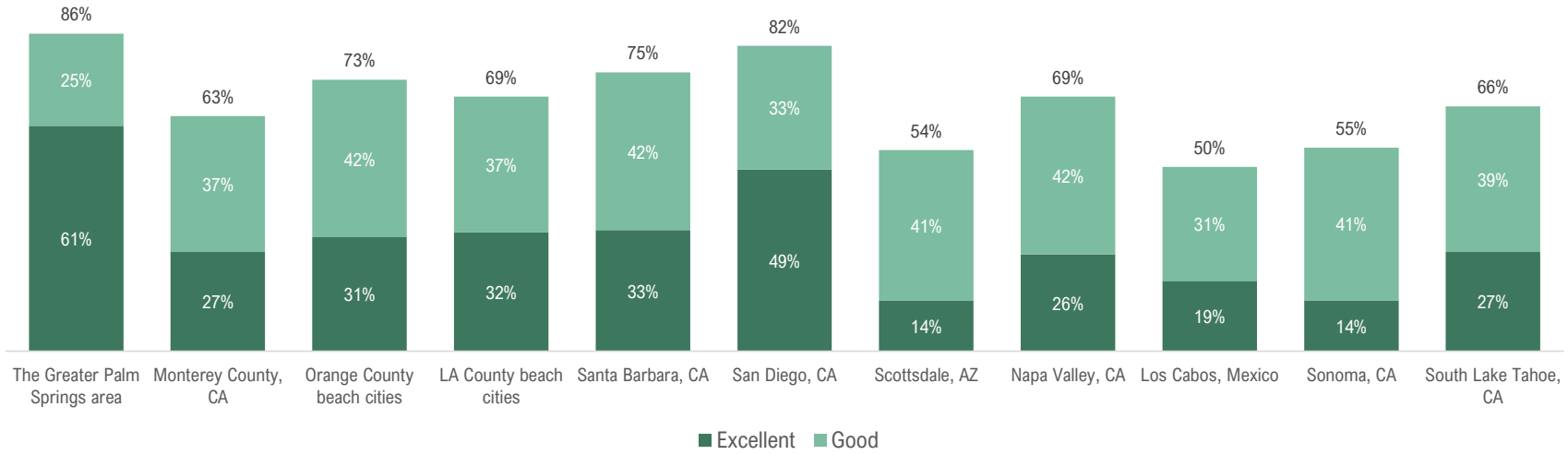
- 90% of residents feel very familiar with the Greater Palm Springs area.
- Beyond Greater Palm Springs, residents feel very familiar with LA county beach cities, San Diego, and Orange County beach cities.
- Greater Palm Springs residents feel least familiar with Los Cabos, Mexico; Sonoma; South Lake Tahoe; and Scottsdale, Arizona.



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Resident Perceptions

- Local residents have the most favorable perceptions of Greater Palm Springs, compared to this competitive set.
- While overall favorability toward San Diego comes close to residents' positive perceptions of their hometown, the share of Greater Palm Springs residents rating their perceptions of San Diego as *excellent* is much lower.
- The lowest positive perception scores were reserved for Scottsdale, Arizona; Sonoma, California; and Los Cabos, Mexico.



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Resident Sentiment

- Resident sentiment is an important contributing factor to the tourism economy in Greater Palm Springs, with nearly a quarter of all visitors traveling to visit family and friends who are local residents.
- Even without awareness of any destination advertising, local residents believe that Greater Palm Springs offers *natural beauty*, *easy navigation*, *many independent shops and boutiques*, *desirable dining experiences*, *rich history,* and *a unique experience that's different from other locales*.
- Much like visitors, many resident perceptions can be influenced through ads. For example, after recalled ad exposure, residents are more likely to believe Greater Palm Springs is a *fun*, *friendly*, and *welcoming* place to visit, with strong *outdoors*, *relaxation*, and *health and wellness* amenities.

>= 4.2	4.19 – 4.00	3.99 – 3.80	< 3.79
Excellent (Top 10%)	Good (Top 25%)	Average	Below Average

SMARInsights Communication Ratings Benchmarks

	Unaware	Ad-Aware
Has natural beauty/scenic landscape	4.34	4.48
Is easy to navigate/get around once I am there	4.32	4.48
Has many local and independent shops or boutiques	4.30	4.44
Has desirable dining options	4.28	4.43
Is a fun place to visit	3.99	4.38
Is a friendly and welcoming place	4.18	4.34
Has a rich history	4.21	4.34
Is a good place for exploring the outdoors	4.10	4.34
Has a relaxing atmosphere	4.17	4.34
Is a great place for a health and wellness trip	4.15	4.28
Is unique from other communities/places	4.30	4.20
Has interesting architecture	4.13	4.14
Is a unique vacation experience you can't get anywhere else	4.07	4.13
Has performing arts or theaters	3.93	4.13
Has great nightlife and bars	3.92	4.10
Has an abundance of art galleries and museums	3.82	4.10
Offers lots to see and do	3.89	4.09
Has outlet/mall shopping	3.73	4.06
Has small-town charm	3.99	4.01
Is a sustainable destination	3.61	4.00
Has iconic or unique cuisine	3.63	3.95
Is a great place for live music	3.63	3.93
Is a good value for the money	3.65	3.85
Is a great place for sporting events	3.10	3.39
Has many attractions for kids	2.92	3.08

SMARInsights

Destination Qualities

>= 4.2 Excellent (Top 10%)	4.19 – 4.00 Good (Top 25%)	3.99 – 3.80 Average	< 3.79 Below Average

SMARInsights Communication Ratings Benchmarks

- Resident sentiment is an important contributing factor to the tourism economy in Greater Palm Springs, with nearly a quarter of all visitors traveling to visit family and friends who are local residents.
- Even without any advertising, local residents believe that Greater Palm Springs offers *great weather* and an *LGBTQ-inclusive* environment.
- Much like visitors, many resident perceptions can be influenced through ads. For example, after recalled ad exposure, residents are more likely to believe that Greater Palm Springs offers *natural beauty*, an *escape or retreat*, and a *comfortable* lifestyle.
- Even with recalled ad exposure, residents do not agree that Greater Palm Springs offers a *family-friendly* or *slow-paced* experience.
- Residents do not believe that Greater Palm Springs is a *pretentious* destination.

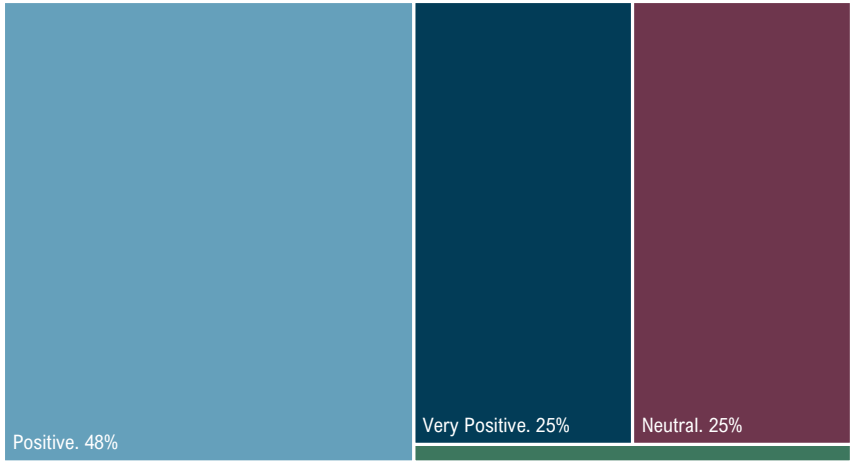
	Unaware	Ad-Aware
Great weather/sunshine	4.23	4.58
LGBTQIA+ friendly	4.59	4.58
Beautiful	4.18	4.41
Escape/Retreat	4.13	4.28
Comfortable	4.07	4.26
Laid-back	3.92	4.19
Safe	4.07	4.13
Oasis	3.87	4.10
Clean/well-kept	4.10	4.09
Upscale	4.07	4.06
Rejuvenating/transforming	3.80	3.99
Serene	3.79	3.95
Health/Wellness-focused	4.01	3.95
Glamorous/elegant	3.73	3.86
Expensive	3.76	3.83
Family friendly	3.37	3.68
Slow-paced lifestyle	3.79	3.59
Pretentious	2.82	2.81

Resident Ad Reactions

>= 4.0 Excellent (Top 10%)	3.9 – 3.99 Good (Top 25%)	3.7 – 3.89 Average	< 3.7 Below Average

SMARInsights Impact Ratings Benchmarks

- 73% of Greater Palm Springs residents liked the destination ads shown as part of this study, with 25% reporting very positive reactions, saying, *I like them very much.* 25% of Greater Palm Springs residents felt neutral about the ads, while just 2% had a negative reaction.
- Residents agreed that the ads fit the way they think about Greater Palm Springs, but the ads were less likely to make residents think about Greater Palm Springs in a different way. This means the ads present the destination accurately, according to resident perceptions—expressing a brand promise that the destination will be able to deliver.



	Score
Show a place where I can relax and rejuvenate	4.29
Are believable	4.18
Fit the way I think about the Greater Palm Springs area	4.11
Make me want to visit the Greater Palm Springs area	4.04
Make me want to learn more about things to see and do in the area	3.92
Make me want to go to the Visit Greater Palm Springs website	3.73
Make me think about the Greater Palm Springs area in a different way	3.55

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