



Background & Objectives

The Greater Palm Springs Convention & Visitors Bureau (CVB) partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct an image awareness study. The research project was designed to measure the organization's progress in shaping perceptions of the region while creating an overall snapshot of current consumer impressions to inform future marketing strategies.

The GPSCVB's last image assessment was conducted in 2011. Since then, the organization has delivered a significant body of work presenting the area's nine cities to a new generation of travelers through a rebranding campaign, paid advertising and myriad public relations programs.

The CVB has expanded its target market groups over time to include:

- **Getaway Markets** within a few hours' drive or a short plane trip away from Greater Palm Springs (GPS). These markets tend to have higher familiarity due to proximity and are typically more inclined to visit for shorter trips.
- Vacation Markets from which visitors would fly to GPS. Familiarity is lower, and there is wide variety among these markets.
- Canadian Markets being travelers mainly based in Western Canada and Toronto.

The travel climate has also changed dramatically over the past seven years; the economy has improved, households have more disposable income and greater numbers of consumers are taking leisure trips.

The goals of this research study are to:

- Compare 2018 results to those from the 2011 image study to see how the CVB's actions have changed perceptions from the baseline findings.
- Identify perceptions of key brand pillars—outdoor adventure, health and wellness, and arts and culture—as travel motivators among various market groups.
- Determine the leading challenges and barriers to travel when it comes to selecting Greater Palm Springs (GPS) as a travel destination.
- Explore how the destination is viewed in different geographic markets and pinpoint future growth markets.
- Identify which image attributes matter most to traveler segments and which are the strongest visitation drivers.
- Identify marketing "experience" opportunities among leisure traveler sub-groups by evaluating their travel planning an behavioral characteristics as well as receptivity to GPS as a destination.
- Develop conclusions and recommendations to assist the CVB in future strategic planning efforts.

Methodology

SMARInsights screened and sampled a similar pool of individuals to those surveyed in the 2011 study. All participants were screened to ensure they met the following criteria:

- 25- to 75-years-old
- Active leisure travelers who typically take two or more leisure trips per year using paid accommodations
- Travel decision-makers for their household
- High-income households

The sample set was managed to ensure the appropriate:

- Gender breakout (57% female, 43% male)
- Age breakout (46% 25- to 40-years-old, 54% 41- to 75-years-old)
- Presence of kids in the household (38% with children)

SPECIFIC SA	AMPLE SIZES AND MAR	KETS
		SURVEYS
Getaway Markets	L.A./Orange County	417
	San Diego	407
	San Francisco	401
	Las Vegas*	343
	Phoenix*	404
Vacation Markets	Seattle/Portland	399
	Chicago	416
	New York	436
	Minneapolis	401
	Dallas	207
	Houston*	207
	Denver	401
	Atlanta*	402
	Boston*	405
	Washington, D.C.*	408
Canadian Markets	Vancouver	402
	Calgary	403
	Edmonton*	402
	Toronto*	403
	Winnipeg*	374
TOTAL		7,638

^{*}New market added in this wave of research not included in 2011 study.





The economy is notably better now than it was in 2011; households have more disposable income, and this is reflected in higher rates of travel.

Overview of Travelers Surveyed: Leisure Travel Behaviors

As with the 2011 image study, the respondents surveyed are well-traveled. In 2011, respondents took an average of 4.1 leisure trips per year during which they stayed overnight in paid lodging, whereas in this new study, the average increased to 5.1 annual trips. The economy is notably better now than it was in 2011; households have more disposable income, and this is reflected in higher rates of travel.

To help enrich the data, many questions in the research were worded differently, making direct comparison on some measures more challenging. The inclusion of nine additional markets with this wave of research also influenced the results. However, the overall character of the travelers surveyed remains the same: well-traveled, high income households.

The following highlights show the general leisure travel behaviors and findings of the sample set surveyed, with additional comparisons to 2011 research.

GENERAL TRAVEL BEHAVIORS					
# of leisure trips in past year	5.1				
% weekend getaways	79%				
# trips of 5+ nights	2.0				
% of trips primarily by air	50%				
Spring trips	89%				
Summer trips	91%				
Business travel	40%				
Spent \$5K+ per year on leisure travel	40%				



Leisure Travel Spending Is Consistent With 2011 Measures

Those surveyed were asked: "Approximately how much would you estimate you spent on overnight leisure/vacation travel, including paid lodging, for you and your family in the past year?" Respondents were shown the spending categories noted in the graph below, with the majority spending between \$1,000 and \$9,999 annually.

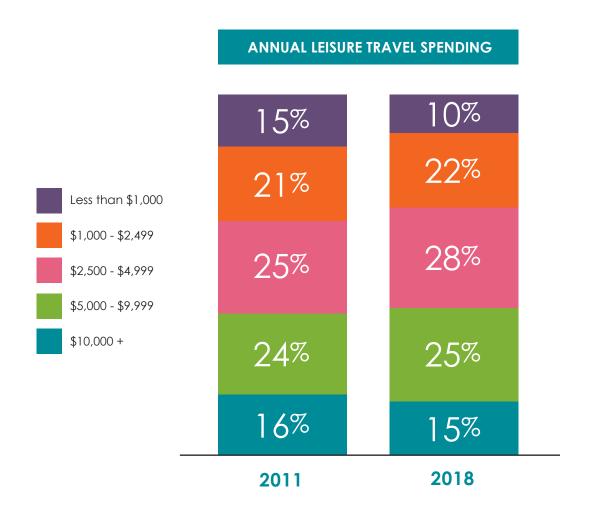
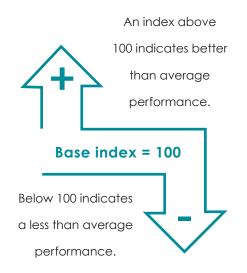




Image Attributes

When asked, "Which of the following words/phrases best describes Greater Palm Springs," the top performers remained great weather/sunshine, upscale, escape, and clean/well-kept. In 2018, "beautiful" and "comfortable" rose higher. Today, the destination's image skews less pretentious and less expensive than it did in 2011. The full list of responses is detailed below.



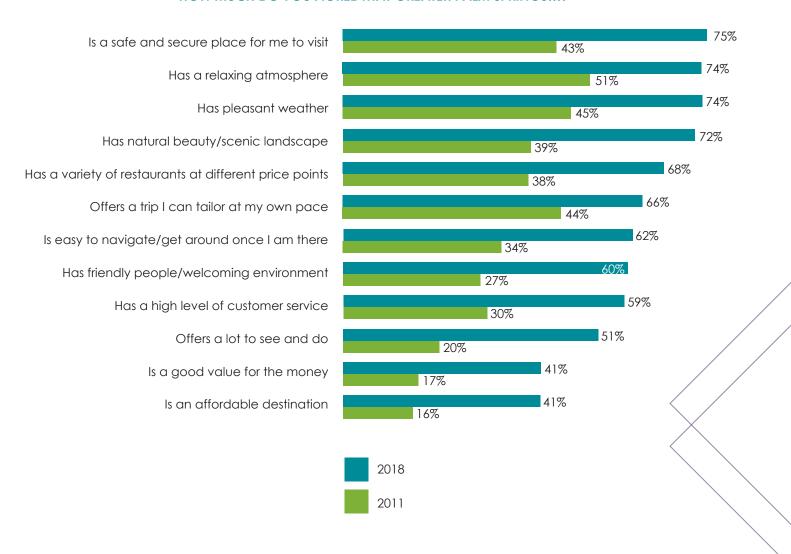
INDEX OF TOP 15 IMAGE ATTRIBUTES					
	2011	2018			
Great weather/sunshine	135	128			
Clean/well-kept	108	113			
Upscale	122	113			
Escape/retreat	117	112			
Beautiful	99	109			
Comfortable	73	107			
Oasis	115	103			
Expensive	128	98			
Health/wellness-focused	92	97			
Laid-back	85	97			
Serene	92	95			
Slow-paced lifestyle	94	89			
Glamorous/elegant	80	87			
Rejuvenating/transforming	80	87			
Pretentious	80	65			



GPS Performs Better Now Than It Did in the Initial Image Research Across All Attributes

Significant gains were seen in perceptions across all image attributes, from safety and atmosphere to natural beauty and affordability. Survey participants were asked to rank how they agreed with specific statements on a scale of one (strongly disagree) to five (strongly agree).

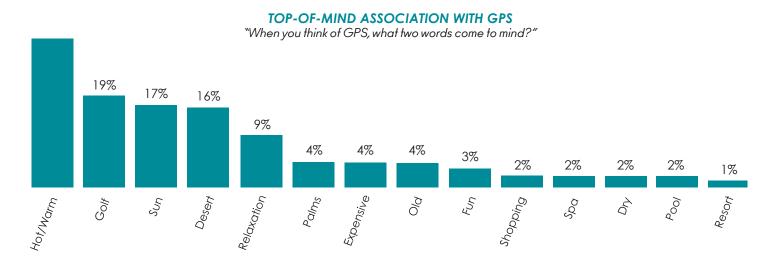
HOW MUCH DO YOU AGREE THAT GREATER PALM SPRINGS ...?





Travelers See GPS as a Hot, Sunny Desert Destination for Golf and Relaxation

To measure unaided image associations with GPS without introducing a pre-produced list, SMARInsights asked travelers what they thought of first when thinking of GPS in an open-ended fashion. Compared to 2011 results, today there is a stronger association with warmth, desert and golf, and a lower association with the elderly. Below are the top associations to the open-ended question.



The 2011 research approached this topic in an aided fashion. Respondents were shown a list of attributes and asked to choose, "Which of the following images or characteristics first come to mind when you think of Palm Springs?" The results compared to the 2018 open-ended response match are as follows:

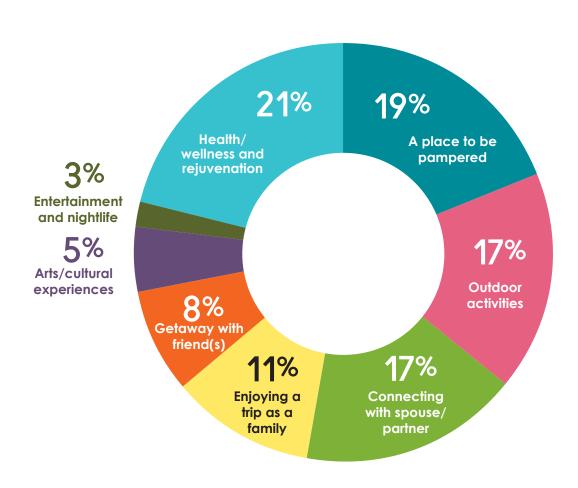
...there is a stronger association with warmth, desert and golf, and a lower association with the elderly.

INDEX TO PRIOR RESULTS						
	2011 2018					
Hot/Warm	202	374				
Golf	191	239				
Desert	194	203				
Old	161	45				
Resorts	153	17				

GPS Is Seen as a Destination for Health, Wellness and Outdoor Activities

The CVB's emphasis on spa and wellness-related messaging has clearly resonated, as these are now the leading experiences that travelers associate with GPS. The outdoor activities pillar is also very well developed. The study revealed an opportunity to further promote GPS' Arts and Culture pillar among prospective travelers.

GPS WOULD BE THE BEST PLACE TO HAVE AN EXPERIENCE OF...





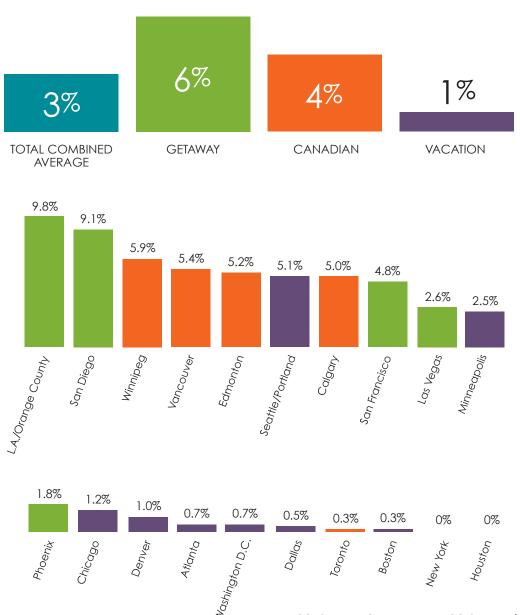
Getaway and Western Canadian Markets Have the Strongest Top-of-Mind Recall of GPS

Top-of-mind mentions indicate a destination's prominence in consumers' minds. Top-of-mind is typically a low and slow-moving metric. Familiarity and interest play important roles in these mentions, so marketing can effectively grow the share of mentions over time.

We asked the open-ended question: "If you were thinking of taking a leisure trip to a place with warmth and sun, what three places first come to mind?" The results revealed that the Getaway Markets—(drive and regional markets that are closer in proximity and more familiar with GPS)—have the highest top-of-mind mentions of GPS. Los Angeles and San Diego, in particular, have the highest top-of-mind awareness of GPS, which is to be expected since they are the closest markets.

The Canadian Markets also have relatively high unaided associations of GPS with a warm, sunny leisure destination. The strength of mentions among Western Canadian markets is noteworthy given their distance from GPS. In fact, Western Canada is outperforming most of the domestic Vacation Markets, which have much lower top-of-mind recall of the GPS area.

TOP-OF-MIND MENTIONS OF GPS BY MARKET GROUP

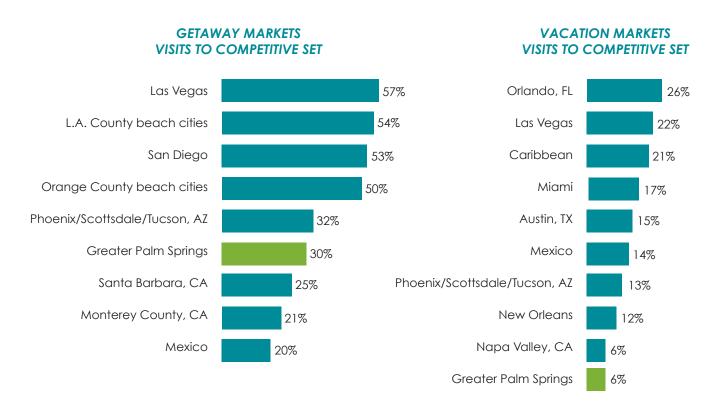




Recent Visits to GPS, Relative to Visits to Other Destinations, Reinforce the Strength of the Getaway and Canadian Markets

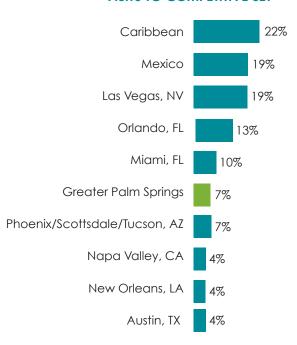
A competitive set is the group of destinations that travelers might consider alongside each other for a particular trip or trip type. One goal of this research was to identify the other destinations travelers consider alongside GPS, establishing a current competitive set.

In the Getaway and Canadian Markets, GPS is the sixth most visited place tested, indicating a relatively strong interest. In contrast, GPS is in last place among the Vacation Markets, which indicates significant opportunity for growth.





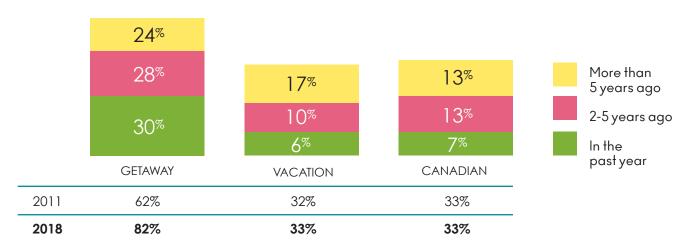




Recent Visitation Is Consistent With What We Have Seen in Prior Research; the Domestic Market Has Grown, Especially From Getaway Markets

Visitation among the Getaway Markets has grown 20%—from 62% in 2011 to 82% in 2018. Visitation has remained consistent in the other two market groups since 2011.

GPS VISITATION BY MARKET GROUP





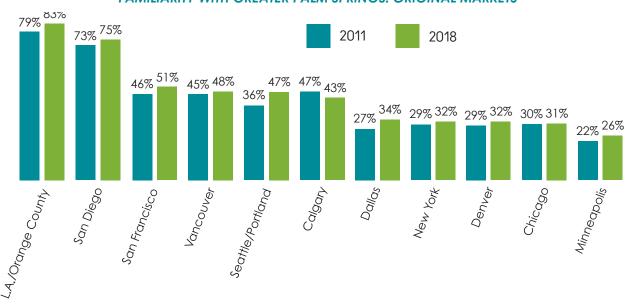
Familiarity Has Generally Grown Over Time in Markets Where the CVB Has Advertised

Familiarity is an important precursor to visitation, and visitation is the most direct way to generate familiarity; the more recent the visit, the higher the familiarity. Among those who haven't visited, marketing can fill the gap and generate familiarity through advertising.

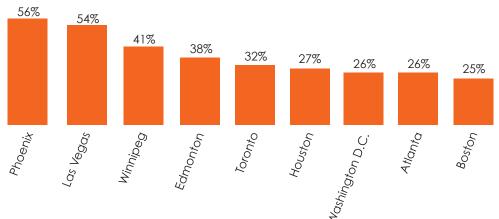
Familiarity with the destination is very low for those who have never visited GPS. By exposing travelers—even those who have never physically visited—to images of the destination and descriptions of the experiences it offers, advertising fosters familiarity, which in turn can lead to visitation.

Survey participants were asked: "How familiar are you with each of the following destinations, in terms of what they have to offer as a place for a leisure trip/vacation?" The results shown below account for the "somewhat" and "very familiar" responses.

FAMILIARITY WITH GREATER PALM SPRINGS: ORIGINAL MARKETS



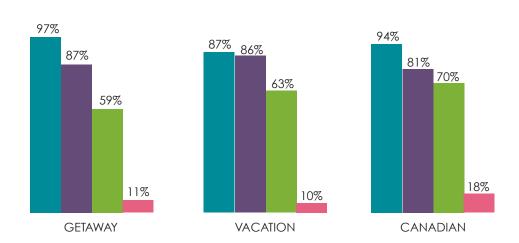
FAMILIARITY WITH GREATER PALM SPRINGS: NEW MARKETS



GREATER PALM SPRINGS CONVENTION & VISITORS BUREAU



FAMILIARITY BY VISITATION HISTORY







Getaway Markets View GPS as Easy and Affordable; Vacation and Canadian Markets Note Its Pleasant Weather

For many of the Getaway Markets, GPS is viewed as a good value and easy to navigate. Other above-average rankings include a pace visitors can set for themselves, restaurants, safety, a welcoming environment, and special events.

Vacation and Canadian Markets view GPS similarly to each other; the attributes they rate highest are pleasant weather, opportunities for outdoor recreation, and variety of experiences offered.

It makes sense that markets based further away rate GPS lower for affordability given the higher cost of travel. However, it is notable that Canadian travelers rate the destination higher on affordability and value than Vacation Market travelers do.

HOW MUCH DO YOU AGREE THAT GREATER PALM SPRINGS?					
	GETAWAY	VACATION	CANADIAN		
Is an affordable destination	107	95	100		
Is easy to navigate/get around once I am there	105	97	99		
Is a good value for the money	105	96	100		
Offers a trip I can tailor at my own pace	103	98	99		
Has a variety of restaurants at different price points	103	98	99		
Is a safe and secure place for me to visit	102	100	98		
Has friendly people/welcoming environment	102	98	101		
Has many special events	102	100	99		
Has a relaxing atmosphere	101	100	99		
Has a high level of customer service	100	100	100		
Is a great place for a health and wellness trip	100	100	100		
Has a lot of cultural activities	100	100	100		
Has natural beauty/scenic landscape	100	101	99		
Offers a lot to see and do	99	100	102		
Is a great place for outdoor recreation	97	101	102		
Has pleasant weather	92	103	104		

Shown are indexed mean ratings across market groups. Green indicates a measure that indexes far above average; orange is below average; yellow is average.



Distance and Travel Costs Are Primary Drivers of Affordability Perceptions

In general, perceptions of GPS as an affordable vacation destination relate to the distance visitors must travel to get there. Airfare costs are tied to distance, and expanded flight service from various markets can improve affordability and transform value perceptions.

There are a few notable outliers among the markets surveyed: New York City is the farthest away from GPS (2,600 miles) and in the top five positive ratings of the area's affordability, whereas Winnipeg gives the lowest affordability rating and is in relatively close proximity (650 miles).



Affordability Rating



Among Those Who Have Never Been to the Region, GPS Is Known for Its Weather—and Not Much Else

Ratings of the region's key selling points are largely neutral among those who have never visited, indicating a lack of knowledge. This makes sense and again points to an opportunity where marketing can be implemented to inform consumers of what GPS has to offer them.

More recent visitors rate the area's attributes positively. The destination's array of cultural activities receives the lowest rating, but even this rating is positive. Visitors who have not been to GPS recently still give positive ratings across all image attributes. Their rankings align with those of recent visitors, with dining options and customizable pace at the top.

Generally, with image attributes:

- Ratings of 4.0 and above are considered very strong.
- 3.5 to 4.0 are moderately strong associations.
- Neutral ratings are between 3.0 and 3.5, which often means that consumers simply don't know.
- Ratings below 3.0 are weak associations, meaning travelers do not think this image statement is true for the destination.

HOW MUCH DO YOU AGREE THAT GREATER PALM SPRINGS						
	IN THE PAST YEAR	2-5 YEARS AGO	> 5 YEARS AGO	NEVER VISITED		
Has a variety of restaurants at different price points	4.3	4.1	3.9	3.9		
Offers a trip I can tailor at my own pace	4.3	4.0	3.8	3.8		
Has pleasant weather	4.2	4.0	3.9	4.1		
Has natural beauty/scenic landscape	4.2	4.0	3.8	3.8		
Has a relaxing atmosphere	4.1	3.9	3.7	3.6		
Is easy to navigate/get around once I am there	4.1	3.9	3.6	3.5		
Offers a lot to see and do	4.1	3.8	3.6	3.8		
Is a safe and secure place for me to visit	4.1	3.8	3.7	3.5		
Has friendly people/welcoming environment	4.1	3.8	3.6	3.7		
Is a great place for outdoor recreation	4.1	3.9	3.7	3.7		
Has a high level of customer service	4.0	3.8	3.6	3.6		
Has many special events	4.0	3.7	3.6	3.6		
Is a great place for a health and wellness trip	3.9	3.7	3.5	3.3		
Is a good value for the money	3.8	3.6	3.3	3.3		
Is an affordable destination	3.8	3.6	3.3	3.3		
Has a lot of cultural activities	3.7	3.5	3.4	3.4		

Shown are indexed mean ratings across market groups. Green indicates a measure that indexes far above average; orange is below average; yellow is average.



Across Markets, Travelers Envision GPS as Pools and Palm Trees

The pool picture is the top most associated with GPS across all market groups. Pools were also a key association in 2011 image research. The architecture and midcentury architecture images are the next most common associations across geographies. This points to a strong overall visual image across markets.





Study participants were asked: "Please indicate how much you agree that each of the following pictures fits with Greater Palm Springs." Percent displayed above is share of travelers who agree that each image fits with the destination.



"Oasis" and "CHILL" Are Among the Strongest Tagline Concepts

Across all three market groups, the tagline that drives interest in a GPS visit among the most travelers is:

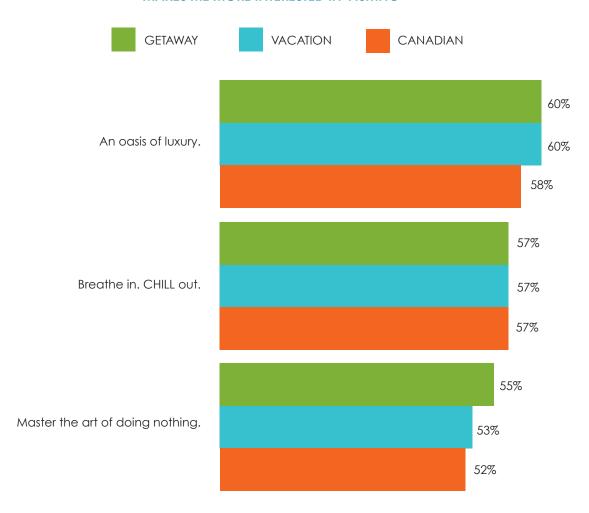
"An oasis of luxury. Picture perfect views, endless days of sunshine and all the amenities you could ever imagine. Luxury. It's where you choose to stay and where you choose to live your passionate self."

The next most motivating tagline, with nearly as much support among travelers, is:

"Breathe in. CHILL out. Palm-filled canyons. Endless nature trails. A bounty of fresh-from-the-fields dining. Eclectic art and shopping wherever you wander. Beautifully appointed hotels and resorts. Healing spas to CHILL your days away."

Survey respondents were asked to consider each of the following statements that describe GPS and indicate how each one impacted their interest in visiting the area. Shown are the percentage who said the tagline makes them more interested in visiting for the top three of 13 taglines surveyed.

MAKES ME MORE INTERESTED IN VISITING

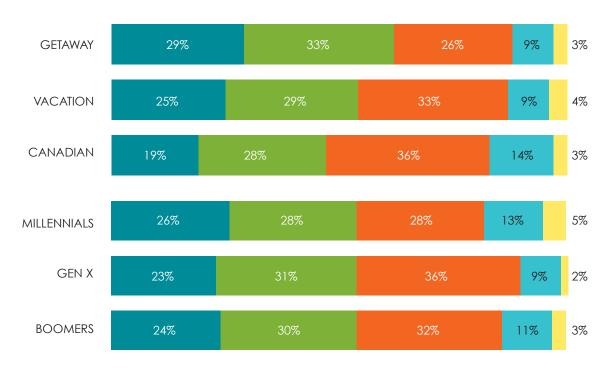




"Greater Palm Springs" Is a Strong Destination Brand

We also surveyed participants on the destination's geographic brand name. All ages and market groups prefer the name "Greater Palm Springs" to "Coachella Valley."

WHICH OF THESE NAMES WOULD MAKE YOU MORE INTERESTED IN VISITING?



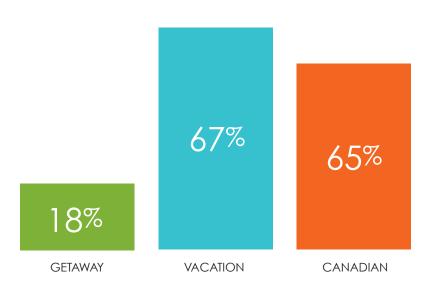




Across Markets, People Don't Choose Not to Visit GPS; They Just Choose Other Destinations

Most travelers who have never visited GPS are from more distant markets..

NEVER VISITED GPS



Rather than present travelers with a list of possible reasons not to visit or return to GPS, which can skew results, SMARInsights addressed the question of never visiting in an open-ended fashion and then coded the results. While many of the results are similar directionally to the 2011 measure, there are also some new explanations in this data; namely, that travelers who have not visited GPS went other places instead.

It's important to remember that travelers do not actually choose against a destination. Rather, consumers typically have several places in mind and then choose to go to one over the others for a particular trip. Therefore asking a consumer why they did not go somewhere can be a challenging question to answer.

The exact question text for the responses shown at right was: "You indicated that you have never visited Greater Palm Springs. Please help us understand why not by typing a brief explanation below." In the 2011 research, this question was asked in aided fashion; respondents were shown a list of reasons and asked to "Select from the list below the primary reasons that you have never visited Palm Springs, California."



WHY HAVE YOU NOT VISITED GPS?					
	GETAWAY	VACATION	CANADIAN		
Prefer other destinations	12%	17%	17%		
Just not interested in visiting Greater Palm Springs	12%	10%	6%		
I don't know enough about it	10%	17%	13%		
No specific reason	7%	8%	7%		
Never thought about it/or considered it	7%	8%	10%		
It doesn't have the activities I am interested in	7%	4%	4%		
It is too hot	7%	2%	2%		
Lacked opportunity/chance to go	7%	9%	9%		
Other	7%	5%	8%		
Greater Palm Springs is too expensive in general	6%	9%	13%		
Not enough time	5%	3%	6%		
It is too far away from my home	5%	9%	3%		
Climate (desert) too similar to home/other destinations	4%	0%	0%		
It doesn't have enough family activities/attractions	3%	3%	1%		
It is a place primarily for old and retired people	3%	2%	2%		
It is a boring destination	2%	0%	1%		
There is not enough to see and do there	2%	1%	1%		
It isn't easy/convenient to get there/difficult to access	1%	2%	1%		
I always go to the same destination each year	1%	1%	1%		
Airfares to Palm Springs are too expensive	0%	0%	1%		
I am concerned about my personal safety in Palm Springs	0%	0%	1%		



People Who Have Not Returned Have Gone to Other Places

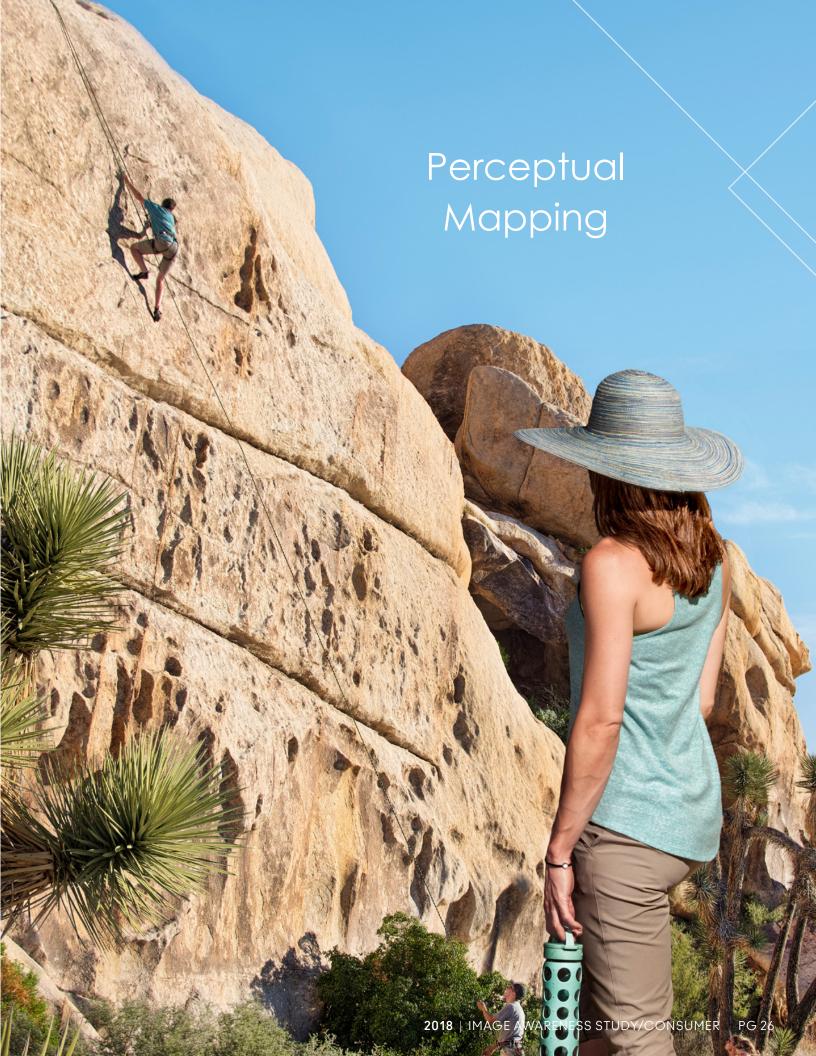
Travelers who had visited GPS two or more years ago were asked why they had not yet returned to the area for another leisure trip.

VISITED GPS 2+ YEARS AGO



Again, SMARInsights asked this question in an open-ended fashion and then coded the results. The main reasons are that people went to other places instead.

WHY HAVE YOU NOT RETURNED TO GPS?					
	GETAWAY	VACATION	CANADIAN		
Have traveled to other destinations during that period	19%	22%	30%		
Prefer other destinations	16%	14%	17%		
Not enough time	9%	7%	10%		
It is too hot	9%	6%	2%		
No specific reason	6%	6%	5%		
Family/friends moved away from Palm Springs	5%	3%	4%		
Climate (desert) too similar to home/other destinations	4%	1%	2%		
Just not interested in visiting Palm Springs again	4%	1%	3%		
It is too far away from my home	4%	11%	4%		
Palm Springs is too expensive in general	4%	7%	8%		
There is not enough to see and do there	3%	2%	1%		
Family obligations	2%	2%	2%		
Just traveling through	2%	1%	1%		
I was unsatisfied with my last visit	2%	2%	3%		
It doesn't have the activities I am interested in	2%	1%	2%		
It is a boring destination	2%	1%	1%		
It doesn't have enough family activities/attractions	2%	1%	1%		
Lacked opportunity/chance to go	2%	2%	1%		
Never thought about it/or considered it	1%	1%	2%		
Went for work/special event	1%	5%	1%		
It is a place primarily for old and retired people	0%	0%	1%		
Health issues	0%	0%	1%		
Hotel rates in Palm Springs are too expensive	0%	0%	1%		
Airfares to Palm Springs are too expensive	0%	1%	0%		
It isn't easy/convenient to get there/difficult to access	0%	1%	2%		



PERCEPTUAL MAPPING

SMARInsights used image attribute ratings and perceptual mapping to Identify and compare GPS' image among competitors. As in prior research, travelers were shown a list of attributes and asked how important each was when choosing a destination for an overnight leisure trip. These attributes are the same ones that are used for perceptual mapping, so understanding how broadly important they are is helpful prior to moving into that analysis.

When Choosing a Destination for an Overnight Leisure Trip, How Important Are Each of the Following Factors?

The attributes shown are the considerations that nearly three-fourths of travelers said were important or very important. These are basic elements of a travel experience that most consumers require before they will venture into a destination.

Shown are share of travelers who answered "important" or "ve	ery important."
Safe and secure	90
Good value for the money	83
Pleasant weather	83
A lot of things to see and do	82
Where you can tailor your trip so you can do things at your own pace	81
Relaxing atmosphere	81
Friendly people/welcoming atmosphere	80'
Variety of restaurants/dining establishments at different price points	77'
Easy to navigate and get around once I am there	76
Natural beauty and scenic landscapes	76
Affordable	75
High level of customer service	74



The factors shown here—which are important to between half and two-thirds of travelers—can offer compelling reasons for consumers to visit. The importance to travelers is determined by their interest in these types of experiences. For example, travelers who want to drive to a destination value a place that is easily accessible by car.

EXPERIENCE APPEAL HELPS A DESTINATION DIFFERENTIATE FROM OTHER PLACES IN THE COMPETITIVE SET.	
Shown are share of travelers who answered "important" or "very import	ant."
Offers enriching experiences	68%
Easily accessible by air transportation/a lot of direct flights	68%
High quality attractions	67%
Variety of attractions at different price points	67%
High quality lodging options	65%
High quality restaurants/dining establishments	65%
Variety of lodging options at different price points	64%
Special deals/promotions/discounts available	64%
Unique/interesting history	58%
Easily accessible by car	56%
Great place to reconnect with family and friends	54%



A Destination Can Also Have Niche Appeal for Travelers to Whom It Offers Experiences They Value

The attributes shown here appeal to smaller shares of travelers—less than half. These factors are typically important to consumers based on their particular situation or needs, as with the prior group of attributes. The difference is the size of the audience to whom the niche attributes are important. For instance, "pet friendly" is important to people who want to travel with their pets, but not important to those who don't.

WHEN CHOOSING A DESTINATION FOR AN OVERNIGHT LEISURE TRIP, HOW IMPORTANT ARE EACH OF THE FOLLOWING FACTORS TO YOU? Shown are share of travelers who answered "important" or "very important." Arts and culture 47% Outdoor activities (hiking, biking, etc.) 46% Unique/interesting architecture 45% Health and wellness 41% High quality resort amenities (spas, golf courses, etc.) 38% Open 24/7 38% Romantic atmosphere 37% Family-friendly/variety of activities for children 36% Unique shopping (not big box retail) 34% Being environmentally responsible/green 34% Lively nightlife 28% Shopping – national brands 26% Pet friendly 17% Lesbian/gay-friendly 13%



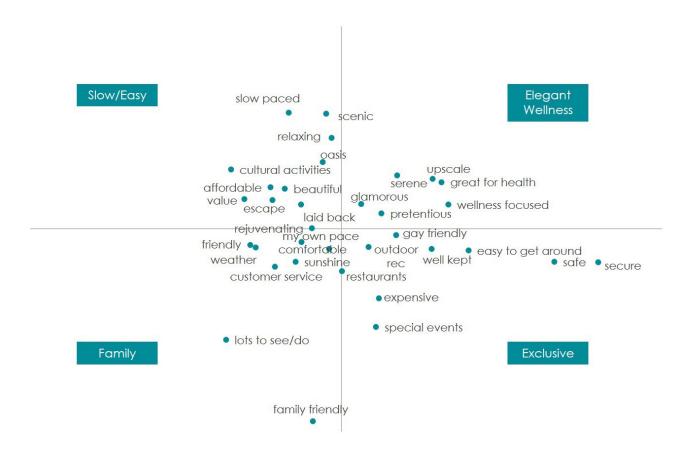
Perceptual Mapping Uses the Same Image Attributes to Create a Landscape Based on Traveler Responses

SMARInsights uses perceptual mapping to identify messages and images that will move people toward consideration of GPS as a leisure destination. This process identifies the perceptions that relate to stronger interest in the destination and isolates the specifics of what increases potential visitation.

Perceptual mapping uses statistical analysis to plot destinations and image attributes on a landscape based on respondents' reactions to them. This illustrates the current position of travelers' perceptions of each destination tested. Proximity on the map represents similarity. Differentiation is defined by distance. Hence, opportunities for the destination to differentiate from competitors can be defined in the physical space of the map.

In terms of competitive destinations, the CVB included additional locations beyond those measured in 2011 to evaluate if different markets had different consideration sets. However, as the following perception maps illustrate, the data shows that across markets, travelers consider one set of places most similar to GPS.

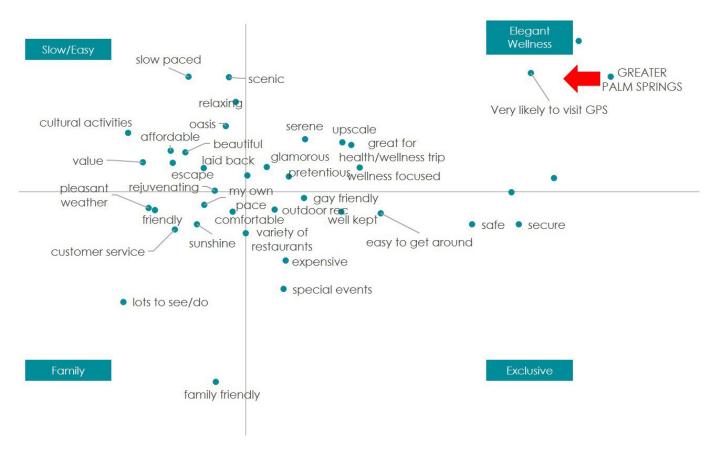
Using statistical analysis, we can show the image attributes on a graph based on how people rate them. The words plotted below are shorthand for the image attributes shown on the prior pages. The map shows us, for instance, that the image descriptors "a great place for a health and wellness trip" and "health/wellness-focused" are rated near each other, which makes sense. The quadrants are named based on the attributes of each.





Plotting Image Location by Visit Intent Suggests Attributes That Could Drive Visit Interest

The map also allows us to plot the image location of GPS by travelers who are "very likely" to visit (the most desirable place on the map, since this image is spurring visit intent as shown in red) compared to the image of GPS among all travelers. The "very likely" to visit position is somewhat closer to the Slow/Easy quadrant, suggesting that attributes like "oasis" and "relaxing" could help drive visitation interest. The position is very similar to the overall position of the destination, which reinforces the strength of this location.





Adding Competitive Destinations Shows Which Places Are Grouped Together by Image

The five destinations in the Elegant Wellness quadrant–defined by being upscale, serene, glamorous, health/wellness-focused, a great place for a health and wellness trip–which includes Greater Palm Springs, are those that travelers perceive similarly and consider visiting similarly. These are GPS' true competitive set.





As in 2011, GPS is Seen as an Oasis; GPS Also Outperforms the Competitive Set on Being Gay-Friendly, Wellness-Focused and Having a Slow Pace

Here, the GPS ratings are indexed against the average of the competitive set's ratings.

WHICH OF THE FOLLOWING WORDS/PHRASES BEST DESCRIBES?						
	Greater Palm Springs	Monterey County, CA	Santa Barbara, CA	Phoenix, Scottsdale Tucson, AZ	Napa Valley, CA	
Oasis	108	94	98	99	100	
Gay friendly	106	99	100	91	104	
Health/wellness-focused	104	97	103	99	96	
Slow-paced lifestyle	103	99	101	98	101	
Great weather/sunshine	102	93	106	97	101	
Glamorous/elegant	102	101	104	88	105	
Pretentious	102	101	101	88	108	
Upscale	102	101	104	88	105	
Escape/retreat	101	101	102	95	101	
Rejuvenating/transforming	101	99	101	98	101	
Laid-back	101	99	103	98	98	
Safe	101	101	103	94	101	
Comfortable	100	101	103	96	100	
Clean/well-kept	100	101	102	94	102	
Expensive	99	104	106	86	106	
Serene	99	102	103	94	102	
Family friendly	97	105	107	105	85	
Beautiful	95	105	105	93	102	

Shown are ratings indexed against the average of these five destinations' ratings.



GPS Is Perceived as More Multidimensional Than Competing Destinations, With Several Prominent Characteristics and Activity Themes

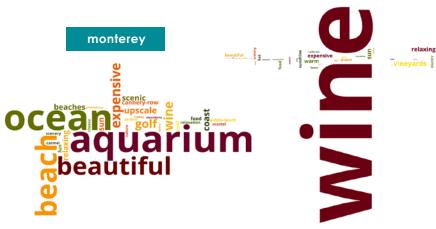
Travelers were asked to describe each destination in two words. The word clouds highlight each competitive destination's predominant image. Most have just a single image:

- Napa Valley is "wine."
- Phoenix, Scottsdale and Tucson are "desert" and "hot."
- · Santa Barbara is "beach."
- Monterey is "ocean" and "aquarium."

GPS, by contrast, is seen as "desert," "golf," "hot," "sun," and "relaxation." This supports the CVB's efforts to promote the variety of experiences offered.

greater palm springs









napa valley

phoenix, scottsdale, tucson



SEGMENTATION

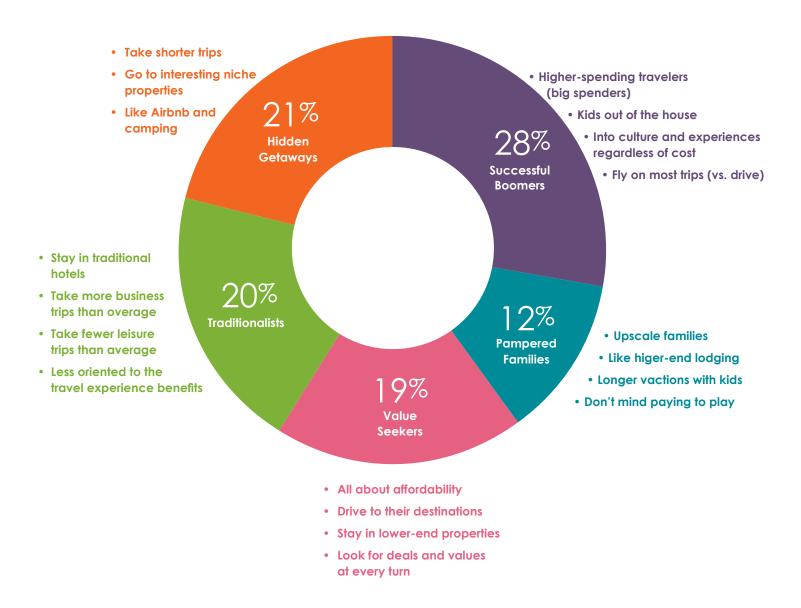
Segmentation is a way to identify opportunities among leisure travelers by evaluating travel planning and behavioral characteristics as well as receptivity to GPS as a destination. As illustrated in prior research, there are different types of travelers, and some are more motivated by and interested in the type of experiences and assets that GPS offers.

This section introduces segments of the traveling households in the markets surveyed. These segments were created through statistical analysis of people's general travel preferences.

First, we introduce the segments. Then we look at Greater Palm Springs' image among the key segments, and what it is about the destination appeals to them. Lastly, we present the messaging and photography most likely to influence visitation among each of the top two target segments.

Defining the Target Segments

Travelers in the target markets are segmented into the categories of Successful Boomers, Pampered Families, Value Seekers, Traditionalists and Hidden Getaways. The segments have more in common across geographic markets than just the markets themselves. In other words, responses from the segments hold together better than responses from geographic groups.





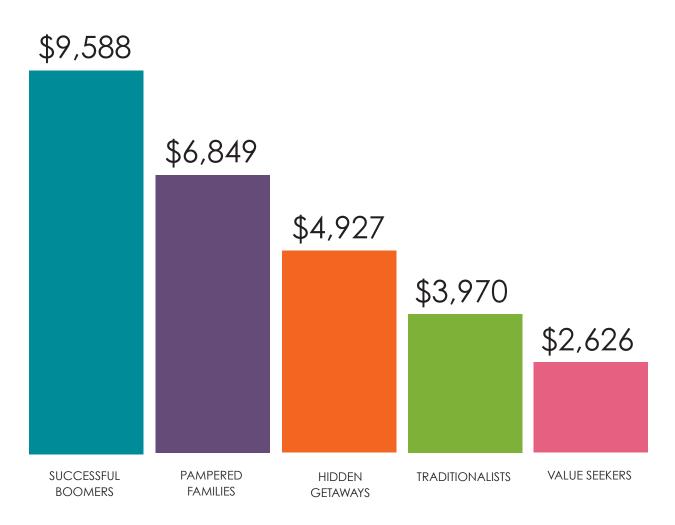
Demographic Differences Help Define the Segments Alongside Their Travel Preferences

WHICH OF THE FOLLOWING WORDS/PHRASES BEST DESCRIBES?						
	TRADITIONALIST	PAMPERED FAMILIES	VALUE SEEKERS	SUCCESSFUL BOOMERS	HIDDEN GETAWAYS	
Male	49%	51%	34%	46%	33%	
Female	51%	49%	66%	53%	67%	
Single/never married	9%	7%	6%	4%	5%	
Married	76%	80%	79%	84%	80%	
Civil Union/domestic partnership	4%	3%	4%	4%	4%	
Living together, no legal recognition	8%	5%	7%	5%	7%	
Divorced/separated	3%	4%	3%	2%	3%	
Widowed	1%	1%	0%	1%	1%	
High school or less	3%	3%	6%	4%	6%	
Some college/technical school	14%	12%	21%	13%	16%	
College graduate	49%	52%	48%	46%	49%	
Post-graduate degree	33%	33 %	25%	37%	29%	
Kids in HH	35%	59%	45%	25%	38%	
African-American	3%	4%	4%	2%	3%	
Asian-American	16%	14%	9%	9%	7%	
Caucasian	75%	72%	80%	84%	85%	
Native American	1%	1%	1%	2%	2%	
Hispanic/Latino	5%	7%	5%	3%	3%	
Lesbian	1%	1%	2%	1%	1%	
Gay	4%	2%	1%	3%	1%	
Bisexual	2%	1%	2%	2%	2%	
Heterosexual	89%	92%	91%	91%	92%	



Successful Boomers and Pampered Families Are the Biggest Investors in Leisure Travel.

AVERAGE ANNUAL VACATION SPENDING





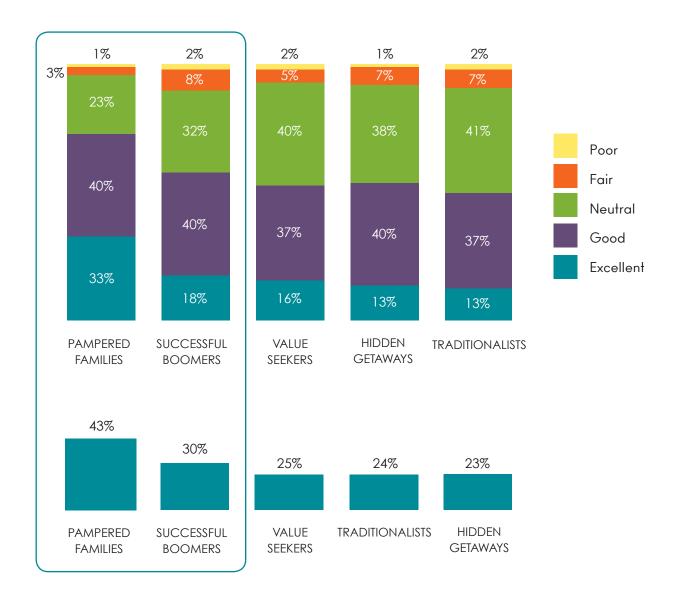
Pampered Families Are By Far the Most Positive Toward GPS, With High Ratings on all Image Attributes; Successful Boomers Are the Next Most Positive

INDEX ON AVERAGE RATING OF GPS						
	PAMPERED FAMILIES	SUCCESSFUL BOOMERS	HIDDEN GETAWAY	VALUE SEEKERS	TRADITIONALISTS	
Is an affordable destination	117	99	94	95	95	
Is a good value for the money	116	99	96	95	95	
Has a lot of cultural activities		115	96	95	9896	
Family friendly	115	95	96	97	96	
Has many special events	113	99	96	97	95	
Offers a lot to see and do	113	97	97	99	94	
Rejuvenating/transforming	112	98	97	97	95	
Has a high level of customer service	111	100	97	97	96	
Has friendly people/welcoming environment	111	99	97	97	96	
Glamorous/elegant	111	99	97	99	95	
Is easy to navigate/get around once I am there	110	102	97	96	95	
Slow-paced lifestyle	110	101	98	95	96	
Comfortable	110	100	97	97	97	
Is a great place for outdoor recreation	110	99	98	97	96	
Serene	110	99	98	97	95	
Beautiful	110	98	99	98	96	
Is a great place for a health and wellness trip	109	101	98	98	95	
Health/wellness-focused	109	100	97	98	95	
Oasis	109	99	99	98	95	
Escape/retreat	109	99	98	97	96	
Offers a trip I can tailor at my own pace	108	101	99	97	95	
Has a variety of restaurants at different price points	108	101	98	97	95	
Has a relaxing atmosphere	108	100	99	97	96	
Has natural beauty/scenic landscape	108	100	99	97	96	
Clean/well-kept	108	100	99	97	96	
Laid-back	108	99	99	98	96	
Is a safe and secure place for me to visit	107	101	99	96	97	
Safe	107	101	98	96	97	
Has pleasant weather	107	100	100	97	96	
Upscale	106	101	99	99	96	
Gay friendly	106	101	99	98	96	
Great weather/sunshine	105	100	100	98	97	

Pampered Families and Successful Boomers Are the Most Positive Toward GPS and the Most Likely to Visit

RATING OF GPS AS A LEISURE DESTINATION

LIKELIHOOD TO VISIT GPS

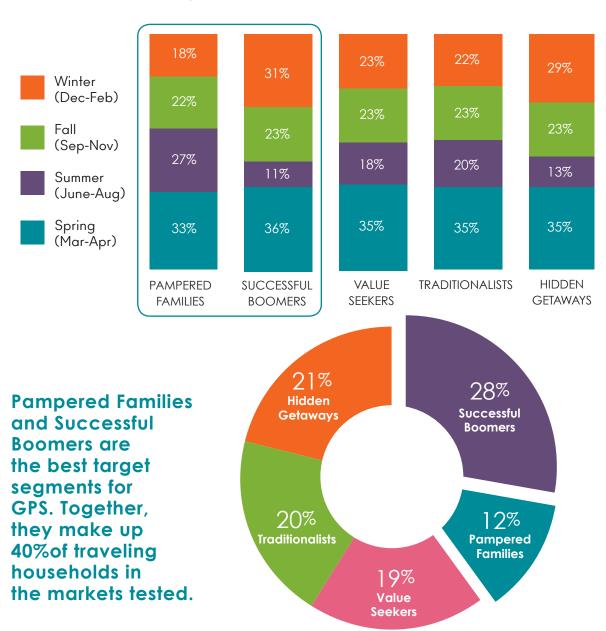




The Data Reveals Opportunities to Target Travelers With Seasonal Messaging

Among all segments, GPS is most considered as a spring destination. Pampered Families also have high interest in a summer visit. Successful Boomers are the most likely to visit in winter. This points to opportunities to target these travelers with seasonal messaging.

IF YOU WERE TO VISIT GPS, DURING WHAT TIME OF YEAR WOULD YOU BE MOST LIKELY TO GO?



TARGET SEGMENT MESSAGING

GPSCVB's marketing messaging has been effective in presenting the destination as a place for relaxation and rejuvenation. The messaging testing results help identify specific ways to layer messaging directed at target seaments to motivate interest and visitation.

Target Segment: Pampered Families

Among high-frequency travelers, Pampered Families travel even more and spend more on travel than other segments. Pampered Families have high interest in a summer or spring visit, likely driven by school schedules.

Markets where a high share of Pampered Families reside include: Los Angeles, Toronto, New York, Chicago, Las Vegas

VISIT IN THE PAST YEAR

Pampered Families have recently visited places with beaches. Water is a key appeal for this group.

PAMPERED FAMILIES	
# Leisure trips in past year	6.0
# Trips of 5+ nights	2.3
Summer trips	93%
Spring trips	89%
Weekend	78%
% of trips primarily by air	56%
Business travel	54%
Spent \$5K+ per year on leisure travel	49%

ity beach cities	67%
ty beach cities 60°	%
San Diego, CA 55%	
Las Vegas, NV 39%	
Orlando, FL 37%	
ta Barbara, CA 37%	
Caribbean 30%	
Miami, FL 28%	
rey County, CA 28%	
dale/Tucson, AZ 20%	
Mexico 19%	
er Palm Springs 18%	
Austin, TX 16%	
ew Orleans, LA 12%	
apa Valley, CA 11%	



Who Make Up the Pampered Families Segment?

Demographically, the Pampered Families segment is fairly evenly split between male and female travel decision makers. Other notable demographic profile insights include:

- The average age is 43, making this the youngest segment.
- With 14% of Pampered Family households earning \$200,000 or more, this is the second most affluent segment.
- Eight in 10 are married.
- Half have kids under the age of 15 in the household.
- Pampered Families are well educated. Eight in 10 have a college or post-graduate degree.
- This is an ethnically diverse audience, with a quarter identifying as African-American, Asian-American, and/or Hispanic.

More Than 90% of Pampered Families in the Gateway Markets Have Visited GPS.

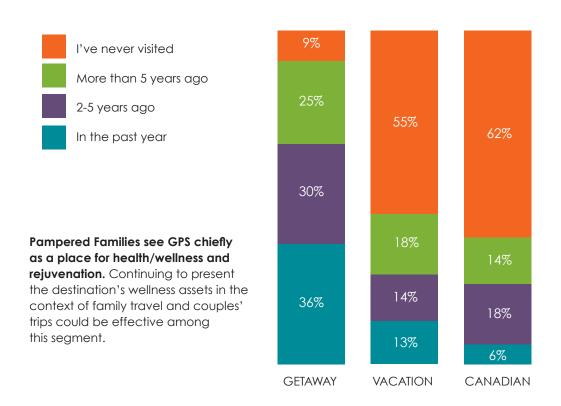
Over half of the Pampered Families target segment in the gateway markets visited within the last 5 years.

Focusing marketing messaging on more distant markets—where more than half have never visited—is a good strategy to introduce GPS to these Pampered Family travelers.

PAMPERED FAMILIES	
Male	51%
Female	49%
Average age	43
\$200K+ HHI	14%
Single/Never married	7%
Married	80%
Civil Union/Domestic Partnership	3%
Living together, no legal recognition	5%
Divorced/Separated	4%
Widowed	%
High school or less	3%
Some college/technical school	12%
College graduate	52%
Post-graduate degree	33%
Kids under 15 in HH	53%
African-American	4%
Asian-American	14%
Caucasian	72%
Native American	1%
Hispanic/Latino	7%
Lesbian	1%
Gay	2%
Bisexual	1%
Heterosexual	92%

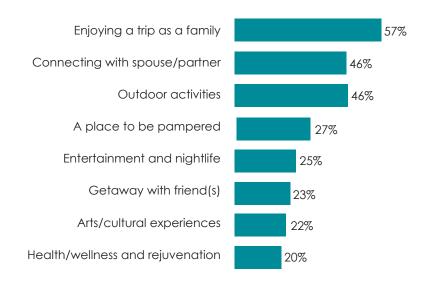


PAMPERED FAMILY VISITATION BY MARKET GROUP





IF YOU WERE TO TAKE A LEISURE TRIP TO A PLACE WITH WARMTH AND SUN, WHAT WOULD BE THE MAIN FOCUS OF YOUR TRIP?











Within the Pampered Families Segment, GPS Leads Among the Competitive Set

GPS leads among the competitive set for being an ideal place for a family trip. Yet, there is still room to grow the area's image as a family destination.

Spa messaging has come through loud and clear in the CVB's marketing efforts, as reflected in its image as a place for health/wellness. GPS also wins among the competitive set for being a place to be pampered, as well as for a friends' getaway, a family trip, and entertainment and nightlife.

BEST PLACE TO HAVE AN EXPERIENCE OF							
	Greater Palm Springs	Phoenix Scottsdale Tucson, AZ	Monterey, CA	Santa Barbara, CA	Napa Valley, CA		
Health/wellness and rejuvenation	20%*	12%	4%	4%	8%		
A place to be pampered	11%*	7%	3%	3%	6%		
Getaway with friend(s)	9%*	4%	2%	1%	6%		
Outdoor activities	8%	10%	4%	2%	6%		
Connecting with spouse/partner	7%	5%	6%	4%	13%		
Enjoying a trip as a family	7%*	2%	3%	2%	2%		
Arts/cultural experiences	4%	7%	2%	2%	8%		
Entertainment and nightlife	4%*	2%	1%	1%	0%		

^{*}GPS is first among competitive set.



IMAGE OF GREATER PALM SPRINGS

POOL



Pampered families associate GPS with pools, palms and the area's unique architecture.

Travelers identified which of a series of images best fit with GPS. Images most chosen by Pampered Families are shown here.

Survey participants were asked: "Please indicate how much you agree that each of the following pictures fits with GPS. 1=Does not fit, 5=Completely fits. Shown are % who answered 4 or 5."

MIDCENTURY ARCHITECTURE



ARCHITECTURE



JOSHUA TREE



SUNNYLANDS



HIKING





Water Is Key for Pampered Families

Travelers in the Pampered Families target segment were shown these images and asked how they impacted interest in a GPS visit. Pool images lead.

IMAGES THAT DRIVE INTEREST AMONG PAMPERED FAMILIES 68% 59% 55% 49% 40% 37% 35% 31% 28% 35%



Variety, Relaxation and Customer Service Are Key to Appealing to Pampered Families

The words and statements shown here are those that are most appealing to the Pampered Families target segment, having a 40% correlation or higher with rating of the destination. They are listed in order of highest to lowest correlation.

HIGHLY CORRELATED WITH GPS RATING

Has a high level of customer service

Offers a lot to see and do

Is a great place for a health and wellness trip

Offers a trip I can tailor at my own pace

Has friendly people/welcoming environment

Is easy to navigate/get around once I am there
Has a lot of cultural activities

Is a safe and secure place for me to visit

Escape/retreat

Comfortable

Is a good value for the money

Rejuvenating/transforming

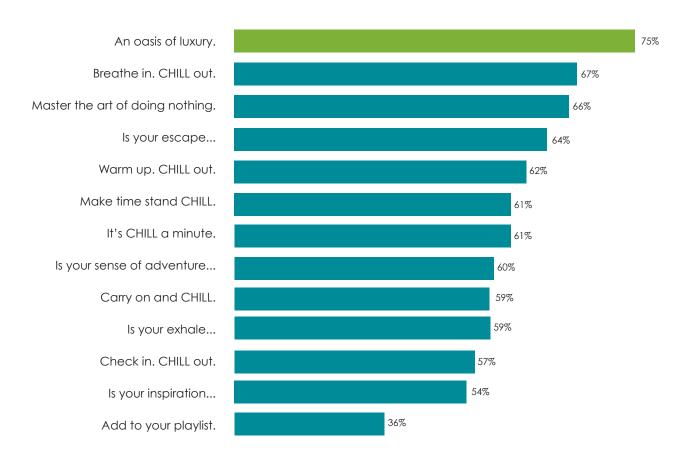
Has natural beauty/scenic landscape

Has a relaxing atmosphere Beautiful

Has many special events



IF YOU WERE TO TAKE A LEISURE TRIP TO A PLACE WITH WARMTH AND SUN, WHAT WOULD BE THE MAIN FOCUS OF YOUR TRIP?



"An oasis of luxury" was the most compelling tagline rated among Pampered Families.

MESSAGING TO SUCCESSFUL BOOMERS

Among high-frequency travelers, Successful Boomers travel more and spend more on travel.

Markets where a high share of Successful Boomers reside include:

- San Francisco Western Canada
- Chicago

Successful Boomers have recently visited places with beaches. Water is a key appeal.

Target Segment: Successful **Boomers**

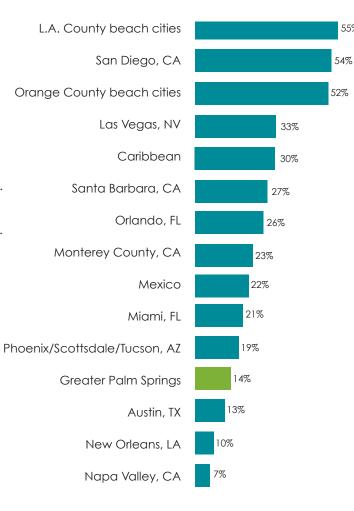
Demographically, the Successful Boomers segment skews slightly more female. Other notable demographic profile insights include:

- This is the oldest of the five segments.
- It is the highest-earning segment; a fifth have household incomes of \$200,000 and above.
- Eight in 10 are married.
- Only a fifth have children under 15 in the household.
- Successful Boomers are well educated. More than eight in 10 have a college or post-graduate degree.
- This is a fairly homogenous group, with more than eight in 10 identifying as Caucasian.
- Nine in 10 Successful Boomers identify as heterosexual.

SUCCESSFUL BOOMERS				
# Leisure trips in past year	5.9			
# Trips of 5+ nights	2.5			
Spent \$5K+ per year on leisure travel	93%			
Summer trips	91%			
Spring trips	90%			
Weekend	81%			
% of trips primarily by air	61%			
Business travel	42%			

VISITED IN PAST YEAR

55%





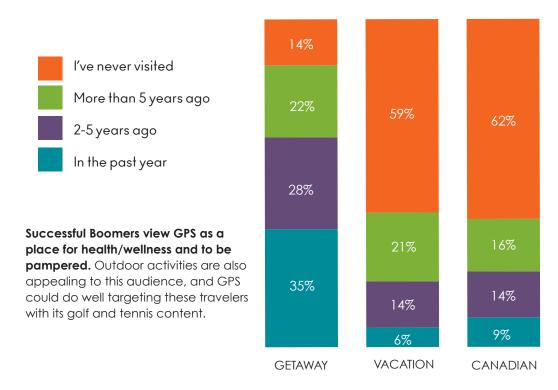
SUCCESSFUL BOOMERS	
Male	46%
Female	53%
Average age	51
\$200K+ HHI	22%
Single/never married	4%
Married	84%
Civil Union/domestic partnership	4%
Living together, no legal recognition	5%
Divorced/separated	2%
Widowed	1%
High school or less	4%
Some college/technical school	13%
College graduate	46%
Post-graduate degree	37%
Kids under 15 in HH	22%
African-American	2%
Asian-American	9%
Caucasian	84%
Native American	2%
Hispanic/Latino	3%
Lesbian	1%
Gay	3%
Bisexual	2%
Heterosexual	91%

^{*}Percentages reflect questions answered.

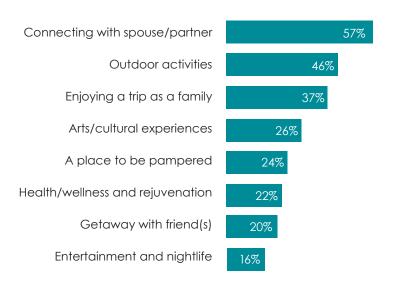


Recent visitation by market group looks similar to Pampered Families. Half of Successful Boomers from nearby Getaway Markets have visited GPS in the past five years. Far fewer from the Vacation and Canadian Markets have visited.

SUCCESSFUL BOOMER VISITATION BY MARKET GROUP



IF YOU WERE TO TAKE A LEISURE TRIP TO A PLACE WITH WARMTH AND SUN, WHAT WOULD BE THE MAIN FOCUS OF YOUR TRIP?





GPS' chief competitor among Successful Boomers is Phoenix/Scottsdale/Tucson for both health/wellness travel and outdoor activities. This presents a messaging opportunity.

Among Successful Boomers, Napa Valley leads for being a place to connect with a spouse or partner. This highlights an opportunity to show GPS' culinary and wine offerings and again to present the area's health/ spa assets in the context of couple's trips specifically to this audience.

BEST PLACE TO HAVE AN EXPERIENCE OF							
	Greater Palm Springs	Phoenix Scottsdale Tucson, AZ	Santa Barbara, CA	Napa Valley, CA	Monterey, CA		
Health/wellness and rejuvenation	19%	20%	2%	8%	4%		
A place to be pampered	14%*	11%	3%	9%	2%		
Outdoor activities	6%	19%	2%	8%	6%		
Getaway with friend(s)	6%	5%	1%	8%	3%		
Connecting with spouse/partner	5%	3%	3%	14%	6%		
Enjoying a trip as a family	5%*	5%	1%	3%	2%		
Arts/cultural experiences	3%	8%	2%	6%	3%		
Entertainment and nightlife	1%	0%	0%	1%	1%		

^{*}GPS is first among competitive set.



Successful Boomers Associate GPS with its unique architecture and pools.

Travelers were asked which of a series of images best fit with GPS. Images most chosen by Successful Boomers are shown here.

Survey participants were asked: "Please indicate how much you agree that each of the following pictures fits with Greater Palm Springs. 1=Does not fit, 5=Completely fits. Shown are % who answered 4 or 5."

SUCCESSFUL BOOMERS

ARCHITECTURE



POOL



MIDCENTURY ARCHITECTURE



JOSHUA TREE





Water Is Key for Successful Boomers

Travelers in the Successful Boomers target segment were shown these images and asked how they impacted interest in a GPS visit. Pool images lead.





Variety, Natural Beauty and Relaxation Are Among the Keys to Appealing to Successful Boomers

The words and statements shown here are those that are most appealing to the target segment that had a 40% correlation or higher with rating of the destination. They are listed in order of highest to lowest correlation.

HIGHLY CORRELATED WITH GPS RATING

Offers a lot to see and do

Has natural beauty/scenic landscape

Has a relaxing atmosphere

Has friendly people/welcoming environment
Beautiful

Comfortable

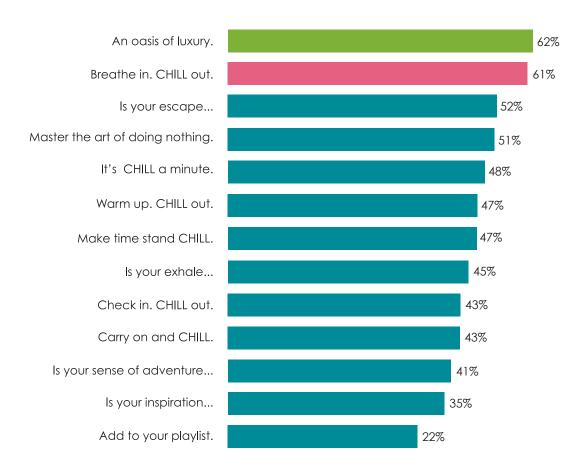
Is a great place for outdoor recreation

Offers a trip I can tailor at my own pace
Rejuvenating/transforming
Escape/retreat

Has a high level of customer service Has a variety of restaurants at different price points



SHARE OF SUCCESSFUL BOOMERS WHO SAY THIS TAGLINE MAKES THEM MORE INTERESTED IN VISITING



"An Oasis of Luxury" and "Breathe in. CHILL out." were the most compelling taglines rated among Successful Boomers.



Much of this research reinforces that the CVB's targeting of high-income, high-frequency leisure travelers is a good strategy. It also confirms that health/wellness and spa/pampering messaging has broad appeal among these travelers.

The findings suggest that the CVB's marketing efforts have helped position the destination as a well-kept, upscale place with great weather/sunshine, and that it is an escape or oasis. Familiarity has generally grown over time in markets where the CVB has advertised.

Ratings of GPS relative to other destinations also reinforce prior findings that some destinations the CVB has considered as part of the competitive set—San Diego, Las Vegas, Orlando and Mexico, for instance—are too different and so conceptually far removed from GPS in travelers' minds that comparison to these destinations is not helpful or strategic. The data shows this is true across geographic market groups. Additionally, across markets, people don't choose not to visit GPS; they simply choose other destinations. There is no specific image barrier keeping visitors from coming.

The set of destinations with the most similar image to GPS, and which travelers are likely to consider alongside GPS as a place to go for a leisure trip, are: Monterey County, Santa Barbara, Napa Valley, and Phoenix/Scottsdale/Tucson. Relative to these destinations, GPS' image is more multi-dimensional, including a greater variety of experiences; whereas the competitive set destinations are more cemented in travelers' minds with a singular image.

GPS is desert, golf, sun and relaxation. GPS is also solidly associated with pools and palm trees and its unique architecture.

These concepts pair well with the CVB's pillars of health/wellness and outdoor activity. In terms of these pillars, the research supports that health/wellness and rejuvenation have been communicated particularly well as experiences that travelers would come to GPS to have. The destination's image as a place for outdoor activity is also fairly well established. The arts and culture pillar is less well-established in travelers' minds, but it is also more of a niche appeal for travelers when choosing a place for a leisure trip.

Oasis and CHILL both work well in the tagline/concept descriptions tested. This is true in the overall results as well as among key segments of travelers. Therefore, the lines could continue to be used depending on which group is being targeted by a particular creative execution.

Looking at geographic markets, the Getaway and Canadian Markets show the most promise for the CVB, as they generally have more favorable views of the destination. Among Getaway Markets, Los Angeles and San Diego are top performers. Among Canadian markets, Western Canada is notably positive about GPS. Nearby Markets view GPS as easy to get to and affordable. GPS' appeal to more distant markets is its weather.

However, an important strategic consideration is that a sociographic targeting approach may work even better for the CVB, in concert with or instead of geographic targeting. Traveler segments based on general travel preferences and behaviors hold together better than geographic groups. In particular:

- Pampered Families are young, well-educated and upscale, and they prefer high-end lodging, take longer vacations with their kids and invest heavily in travel experiences. This segment has the most positive image of GPS of all the segments and is the most likely to visit. Spring and summer are key visit times for Pampered Families, and many of these households are likely navigating school schedules.
- Successful Boomers are older, well-educated, upscale empty-nesters. They are big spenders interested in culture and experiences and tend to fly versus drive on their leisure trips. These travelers would go to a place like GPS as an opportunity to reconnect with a spouse or partner and/or for outdoor activities.

Both segments have a strong association of GPS with pools, palm trees, and architecture. Together, they compose 40% of high-income, high-frequency leisure travelers across markets.



Summary: Marketing to Successful Boomers

KEY APPEALS: Variety of experiences, natural beauty and relaxation.

MOST IMPACTFUL TAGLINES: An oasis of luxury.

Picture perfect views, endless days of sunshine and all the amenities you could ever imagine. Luxury. It's where you choose to stay and where you choose to live your passionate self.

Breathe in. CHILL out. Palm-filled canyons. Endless nature trails. A bounty of fresh-from-the-fields dining. Eclectic art and shopping wherever you wander. Beautifully appointed hotels and resorts. Healing spas to CHILL your days away.

IMAGES THAT DRIVE INTEREST IN A VISIT







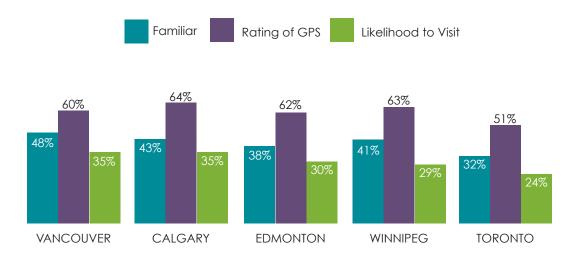
IMAGES THAT FIT WITH THEIR VIEW OF GPS



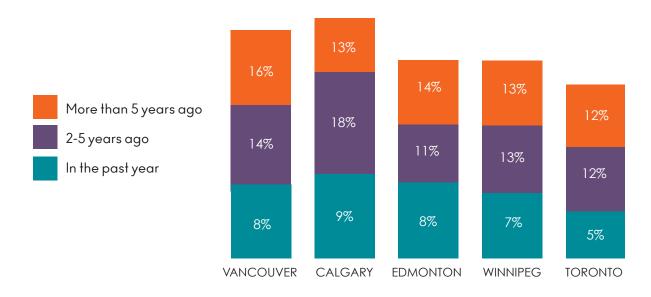


Canadian Market Views of GPS

Among Canadian markets, Vancouver, Calgary, Edmonton and Winnipeg rate GPS the highest as a place for a leisure trip, are the most familiar with the destination and have the highest likelihood to visit.

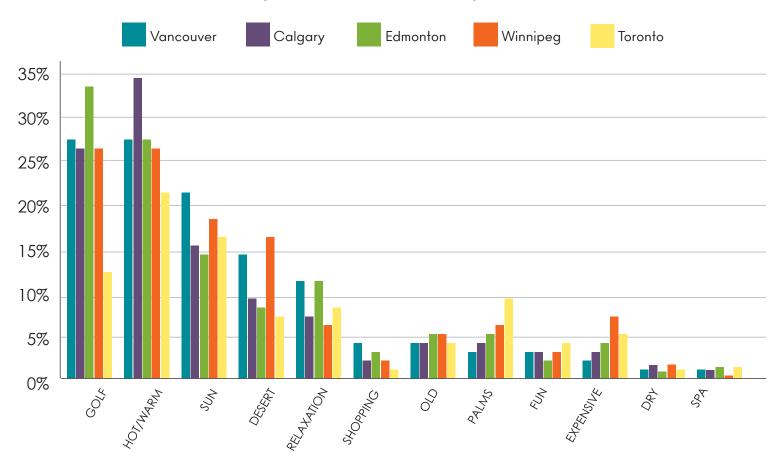


Again, the Western Canadian markets are the high performers. Calgary has the most experience with GPS, and the most recent experience. Toronto has the least.



The more familiar and positive markets—Vancouver, Calgary and Edmonton—view the area mainly as golf, warmth, and sun.

WHEN YOU THINK OF GPS, WHAT TWO WORDS COME TO MIND? (CODED OPEN ENDED RESPONSES)



GPS' weather is the top-rated image attribute across all Canadian markets, followed by being a safe place to visit and having a relaxing atmosphere—each of which are basic "cost of entry" features that most consumers require before they will venture into a destination.

On the more niche attributes—health/wellness, cultural activities, outdoor recreation—Canadians in all markets rate GPS in a more neutral manner, suggesting a lack of information.

HOW MUCH DO YOU AGREE THAT GPS? MEAN RATING ON 5-POINT SCALE						
	VANCOUVER	CALGARY	EDMONTON	WINNEPEG	TORONTO	
Has pleasant weather	4.2	4.2	4.2	4.3	4.2	
Is a safe and secure place for me to visit	4.0	4.0	3.9	4.0	4.0	
Has a relaxing atmosphere	4.0	4.0	4.0	4.0	4.0	
Has a variety of restaurants at different price points	3.9	3.9	3.8	3.9	3.8	
Is a great place for outdoor recreation	3.9	4.0	3.8	4.0	3.9	
Offers a trip I can tailor at my own pace	3.8	3.9	3.9	3.8	3.8	
Has natural beauty/scenic landscape	3.8	3.9	3.9	4.0	3.9	
Is a great place for a health and wellness trip	3.8	3.8	3.8	3.8	3.8	
Is easy to navigate/get around once I am there	3.8	3.8	3.8	3.8	3.8	
Has friendly people/welcoming environment	3.7	3.8	3.7	3.7	3.8	
Has a high level of customer service	3.7	3.8	3.7	3.7	3.8	
Offers a lot to see and do	3.5	3.7	3.6	3.6	3.6	
Has many special events	3.4	3.5	3.4	3.4	3.5	
Is an affordable destination	3.4	3.4	3.3	3.2	3.3	
Is a good value for the money	3.4	3.4	3.3	3.2	3.5	
Has a lot of cultural activities	3.3	3.3	3.3	3.3	3.5	

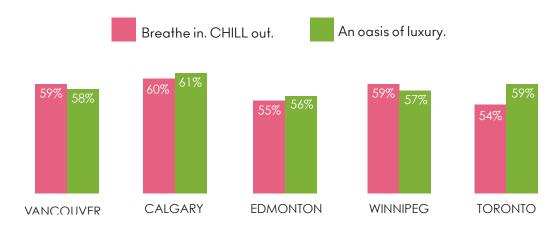
Again, GPS' weather is the top-rated attribute across all Canadian markets, followed by safety.

And as with the other image attributes, the more niche appeal descriptors—such as family friendly and gay friendly—receive neutral levels of agreement suggesting a lack of knowledge.

As the following charts show, the images that generate the most interest in a visit are pool images. These reinforce the general cost-of-entry perceptions of GPS as a warm, safe, and relaxing place to visit. While they do not provide very much specific product information or details about niche interest, they are broadly appealing across Canadian markets.

WHICH OF THESE WORDS/PHRASES DESCRIBES GPS? MEAN RATING ON 5-POINT SCALE							
	VANCOUVER	CALGARY	EDMONTON	WINNEPEG	TORONTO		
Great weather/sunshine	4.3	4.4	4.3	4.3	4.2		
Safe	3.9	3.9	3.8	3.8	3.9		
Clean/well-kept	3.9	3.9	3.8	4.0	3.9		
Comfortable	3.9	3.9	3.8	3.8	3.9		
Escape/Retreat	3.9	3.9	3.8	3.8	3.8		
Laid-back	3.8	3.7	3.7	3.7	3.7		
Beautiful	3.8	3.9	3.9	3.8	3.9		
Oasis	3.7	3.8	3.7	3.7	3.8		
Upscale	3.7	4.0	3.8	3.9	3.9		
Slow-paced lifestyle	3.7	3.7	3.6	3.7	3.6		
Health/wellness-focused	3.7	3.7	3.7	3.6	3.8		
Serene	3.7	3.7	3.6	3.6	3.8		
Rejuvenating/transforming	3.6	3.6	3.6	3.5	3.7		
Expensive	3.6	3.8	3.7	3.8	3.8		
Family friendly	3.5	3.5	3.4	3.3	3.6		
Glamorous/elegant	3.5	3.6	3.5	3.5	3.8		
Gay friendly	3.3	3.4	3.3	3.1	3.3		
Pretentious	3.1	3.3	3.3	3.1	3.4		

MOST IMPACTFUL TAGLINES



TOP 3 IMAGES THAT DRIVE INTEREST IN A VISIT











