visit greater palm springs

Image and Awareness Research

September 2023

SMARInsights

Background & Objectives

- Visit Greater Palm Springs (VGPS) has partnered with Strategic Marketing & Research Insights (SMARInsights) since 2013 to measure advertising effectiveness, image, new creative concepts and executions. Through this partnership, we have come to understand VGPS' target audience. However, during the pandemic, as travelers – limited by public safety restrictions – flocked to the outdoors, new travelers discovered the Greater Palm Springs area. Therefore, there is interest at VGPS in understanding how the current audience differs from those measured in the prior Image Awareness Studies.
- This is highly relevant because as audiences shift, so should marketing messaging. In order to remain relevant to both new and returning audiences, VGPS needs to keep tabs on the traveling public.
- This research is an update of Image Awareness studies conducted in 2011 and 2018, the latter by SMARInsights. In summary, the objectives of the image awareness research are to:
  - —Measure awareness and image of the Greater Palm Springs area as a vacation destination among leisure travelers in leading California and non-California target markets.
  - —Assess awareness and recall of Greater Palm Springs advertising and promotional messaging.
  - —Determine the leading barriers against the selection of Greater Palm Springs as a travel destination.
  - —Identify marketing opportunities among leisure traveler sub-groups in various markets by evaluating their travel planning and behavioral characteristics as well as receptivity to Greater Palm Springs as a destination.

Methodology

- The markets that are the focus of VGPS include:
  - **Getaway markets** are drive markets and regional short-haul markets typically more inclined to visit for shorter trips. These markets tend to have higher familiarity due to proximity.
  - **National markets** are those from which visitors would fly to GPS; familiarity is lower. There is also wide variety among these markets.
  - **International markets** are Canadian CMAs, mainly in Western Canada.
- SMARInsights screened and sampled similar audiences to the prior research. All participants were screened to ensure they were:
  - 25- to 80-years-old
  - Active leisure travelers (typically take at least one leisure trip per year using paid accommodations)
  - Travel decision-makers for their household
  - High-income households
- Sample also was managed to target appropriate:
  - Gender break-out (60% female, 40% male)
  - Age break-out (half over and under 40 years of age)
  - Presence of kids in the household (approximately a third with children)

Market group	DMA	Surveys
Getaway Markets (Drive)	Los Angeles	403
	Las Vegas	367
	Phoenix	407
	San Diego	390
	San Francisco	403
National Markets (Fly)	Atlanta	402
	Austin	401
	Chicago	403
	Dallas	401
	Denver	401
	Houston	401
	Minneapolis-St. Paul	402
	New York	400
	Portland	302
	Salt Lake City	401
	Seattle	300
International Markets	Calgary	399
	Toronto	302
	Vancouver	403
Residents		300
TOTAL		7,588

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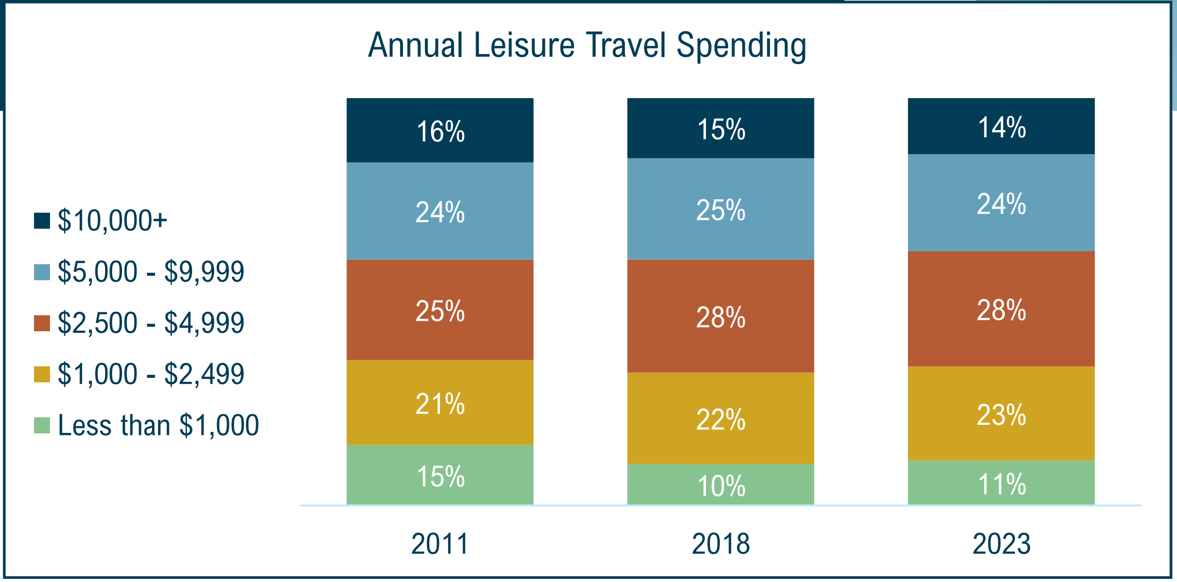
Overview of Travelers Surveyed

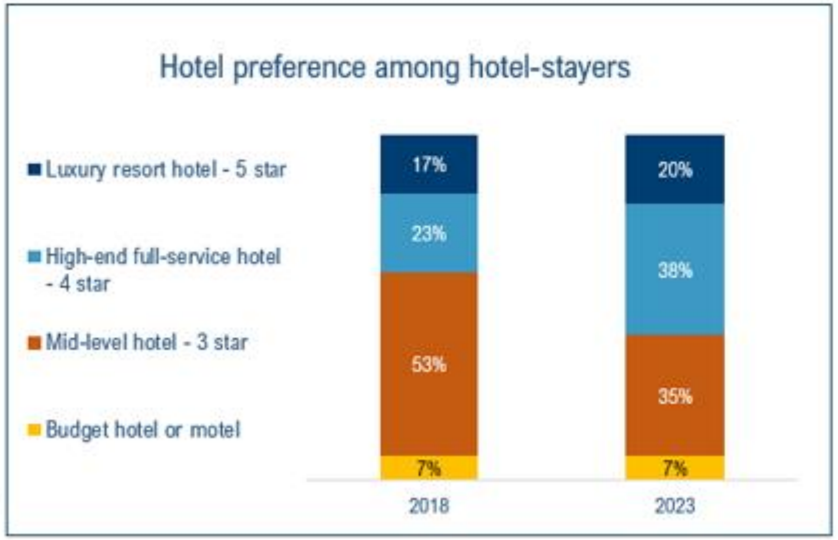
- Much has changed since the last image survey in 2018. Most notably, a pandemic dramatically shifted the travel paradigm for a number of years and is only now finally returning to normal.
- While the screening criteria and demography of the respondents in this research effort are essentially unchanged, some travel behaviors are somewhat different.
- Perhaps most notably is a continued illustration of the pent-up demand the pandemic caused: people are taking more trips than before.
- Spending, on the other hand, has essentially remained unchanged.
- Travelers are taking more weekend drive trips than in 2018.

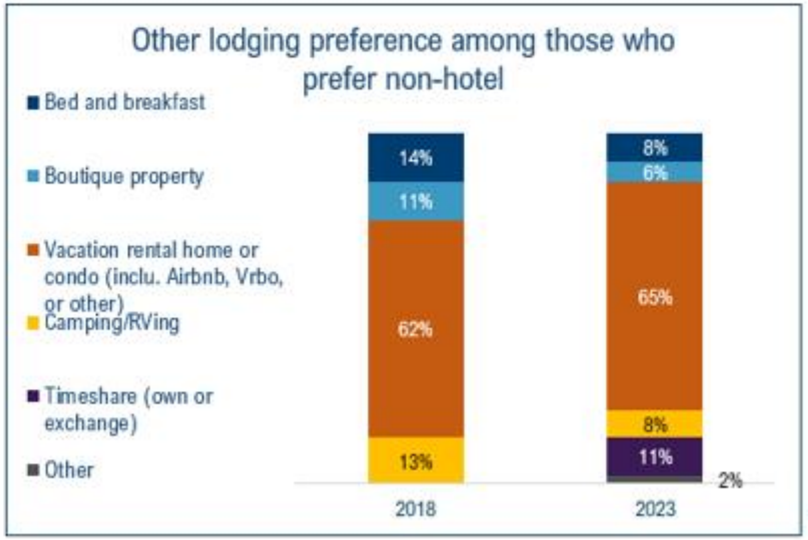
General Travel Behaviors	2018	2023
Leisure trips in past year	5.1	6.3
Weekend	79%	92%
Trips of 5+ nights	2	2
Trips primarily by air	50%	45%
Spring trips	89%	82%
Summer trips	91%	87%
Business travel	40%	39%
Spent $5K+ per year on leisure travel	40%	38%

Spending is unchanged

- While more shorter trips are being taken, the overall level of spending on travel remains unchanged. But the spending is being allocated differently than it was pre-pandemic.
- Two of the biggest shifts can be seen in accommodation preferences where we see a significant decline in mid-level hotel use and a jump in high-end hotels and short-term rentals.







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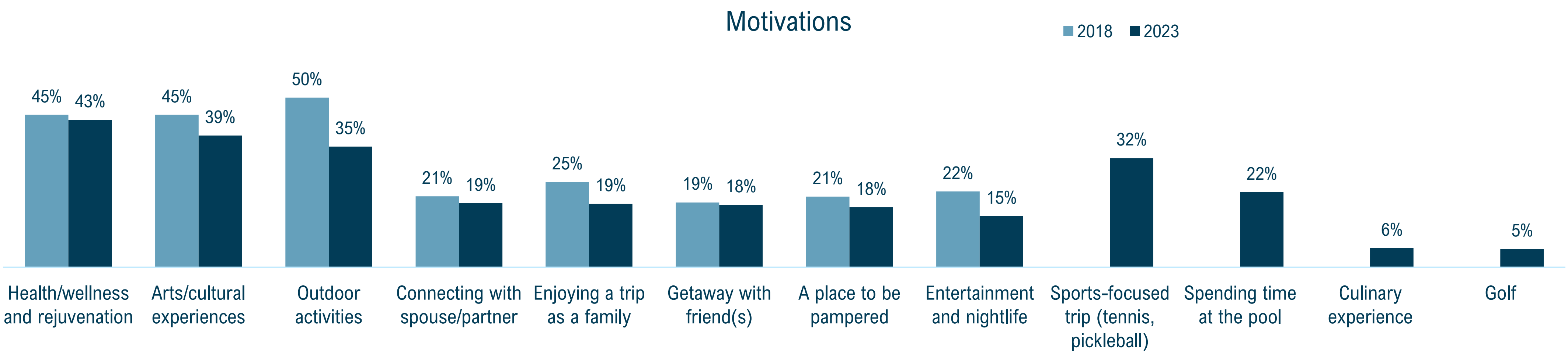
Travel Motivations

- Interestingly, and perhaps not surprisingly, some shifts in travel motivations can also be seen. Here, we don't have a direct comparison to the prior measure since more motivational categories were asked in this research. The result is a slight decline across all those asked before. Interestingly, we see larger declines in outdoor activities and family travel as motivators, which could be related to the activities travelers were forced toward during the pandemic – these data may be illustrating a reaction against that.
- Additionally, just spending time at a pool and culinary experiences -- new metrics added with this measure – are also strong motivations.



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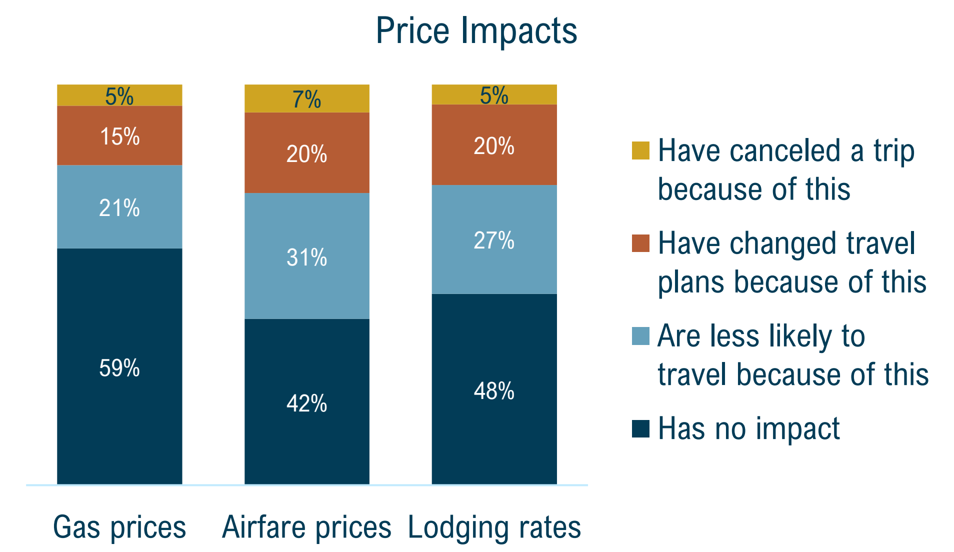
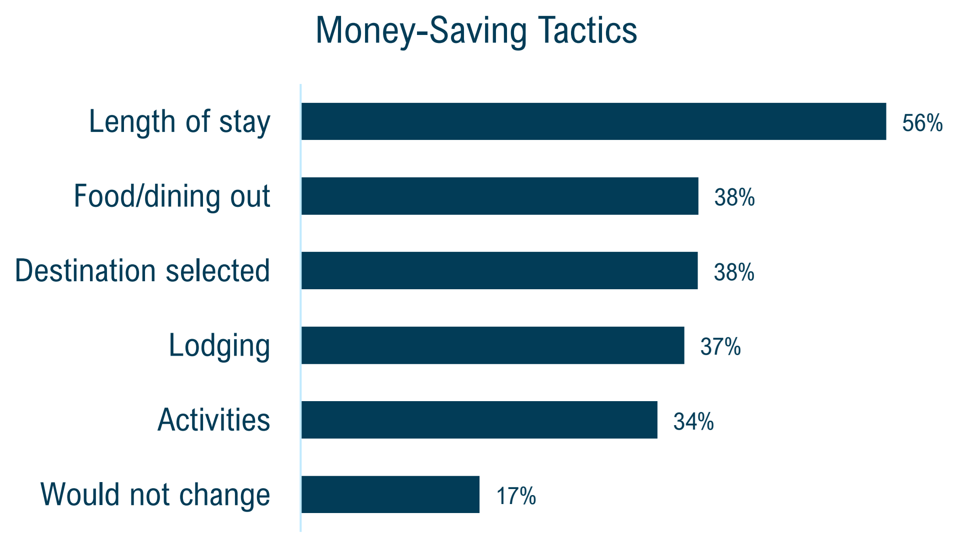
External Impacts

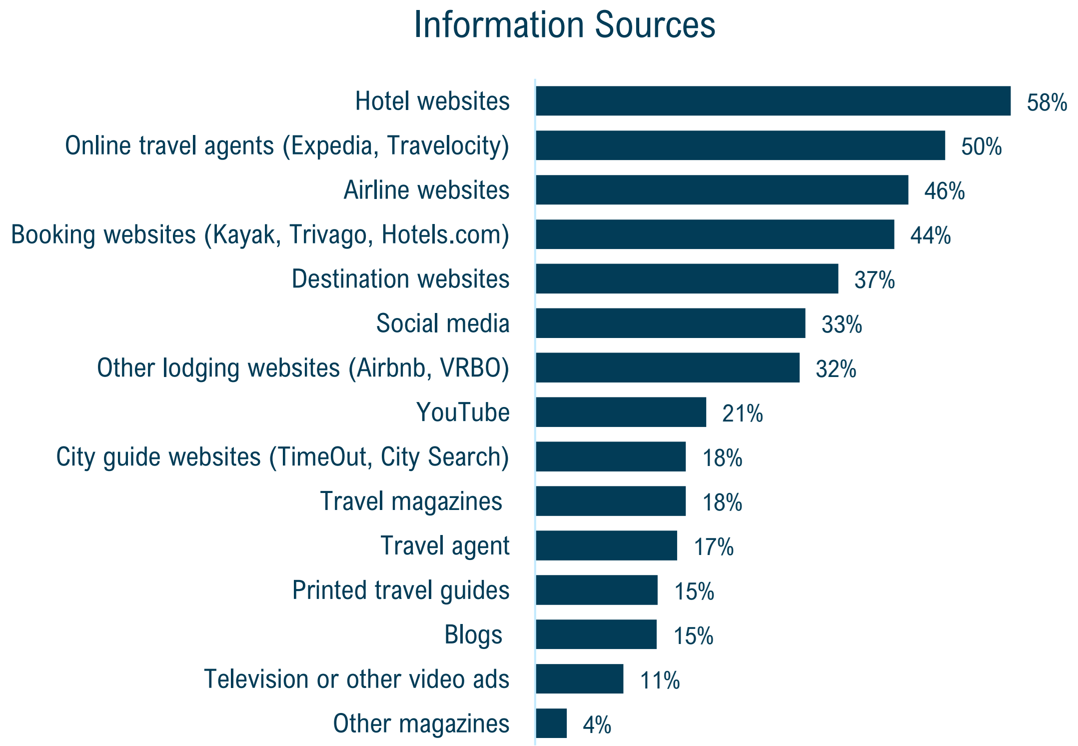




- With the pandemic there was a paradigmatic external impact that disrupted travel. Other less significant forces can often be seen to come into play, particularly economic ones. And a pending economic downturn and inflationary pressures have been with us for some time.
- In this context, it makes sense to explore the types of impacts these pressures might have – specifically pricing pressures on gasoline, airfare and hotel rates.
- The results somewhat overstate the impacts that we typically see, which are minimal. Gas prices have the least impact while airfare has the most – perhaps reflective of the percentage of travel expense that goes to each category of spending.
- In terms of money-saving tactics, travelers tend to make minor adjustments in behavior – such as changing length of stay or modifying their restaurant choices – over making wholesale changes of plans.

Information Sources

- Information sources have not changed much in recent years. Travel-related resources are more booking-oriented and unrelated sources are more inspiration-focused.



Looking for inspiration and first thinking about a trip	
Social media	76%
Travel magazines	74%
YouTube	73%
Television or other video ads	73%
Blogs	71%
Other magazines	70%
Comparing destinations and selecting where to go	
Other magazines	59%
Destination websites	56%
YouTube	56%
Travel magazines	55%
Social media	52%
Itinerary and activities in the destination	
Blogs	61%
City guide websites	57%
Printed travel guides	57%
Destination websites	55%
YouTube	54%
Social media	51%

Selecting hotels and transportation	
Online travel agents	70%
Other lodging websites	64%
Booking websites	63%
Hotel websites	62%
Travel agent	60%
Bookings for flights, hotels or activities	
Airline websites	77%
Hotel websites	66%
Booking websites	62%
Online travel agents	61%
Other lodging websites	60%
Travel agent	59%
In the destination, to find things to see and do	
City guide websites	46%
Printed travel guides	40%
Destination websites	38%

Brand Health Measures

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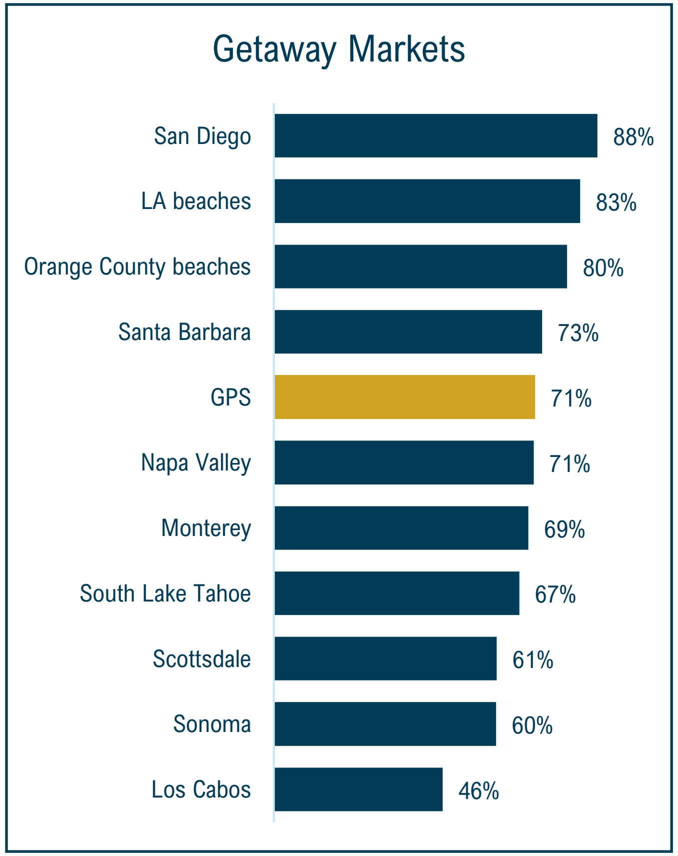
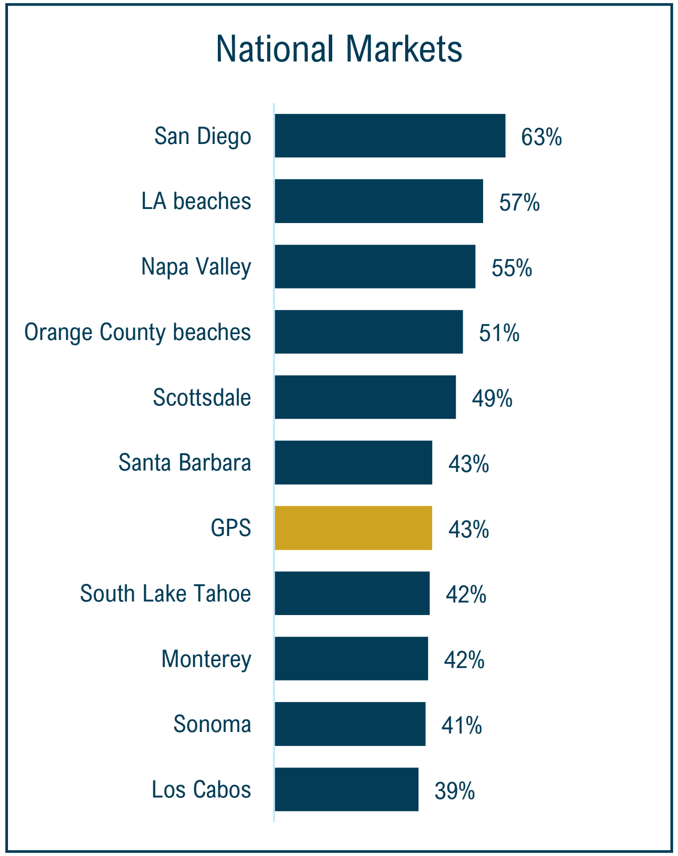
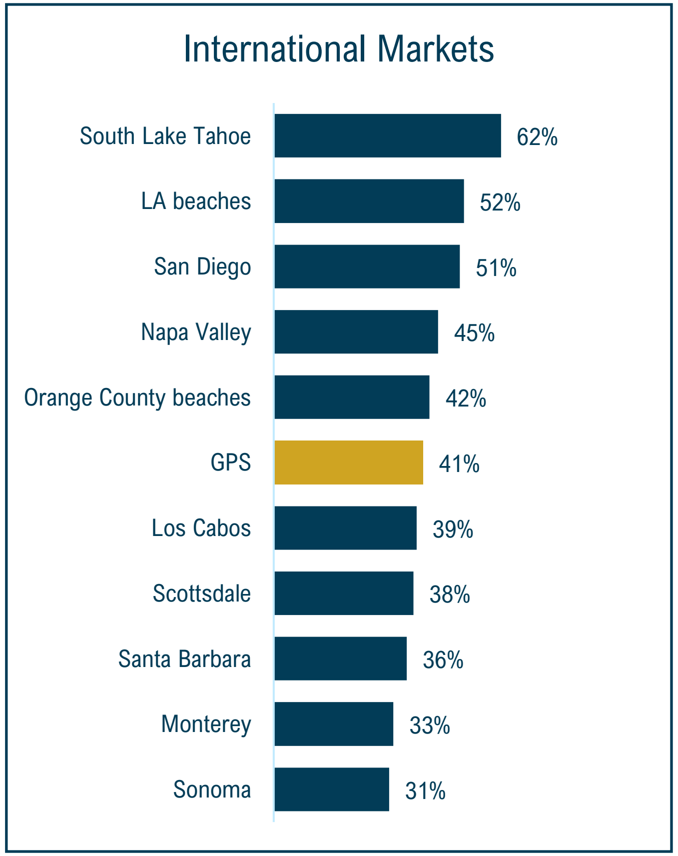
Familiarity

- Against a more targeted competitive set, GPS is in the middle of the pack in terms of familiarity

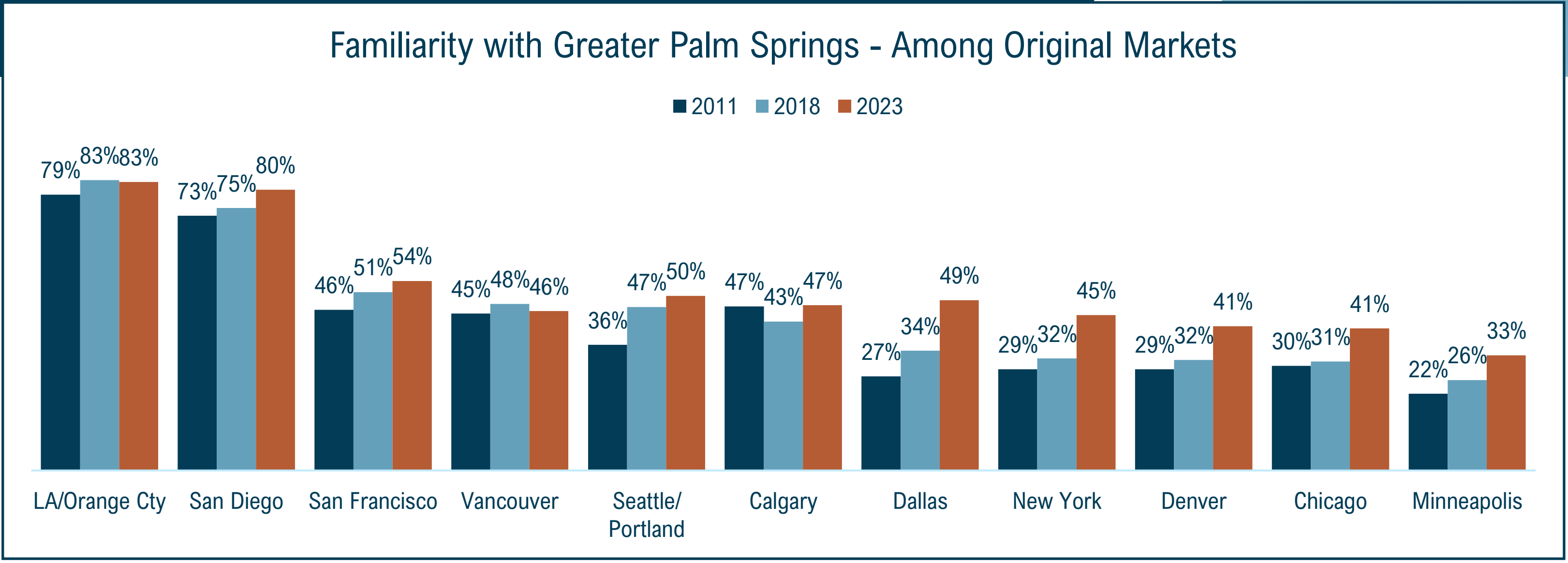


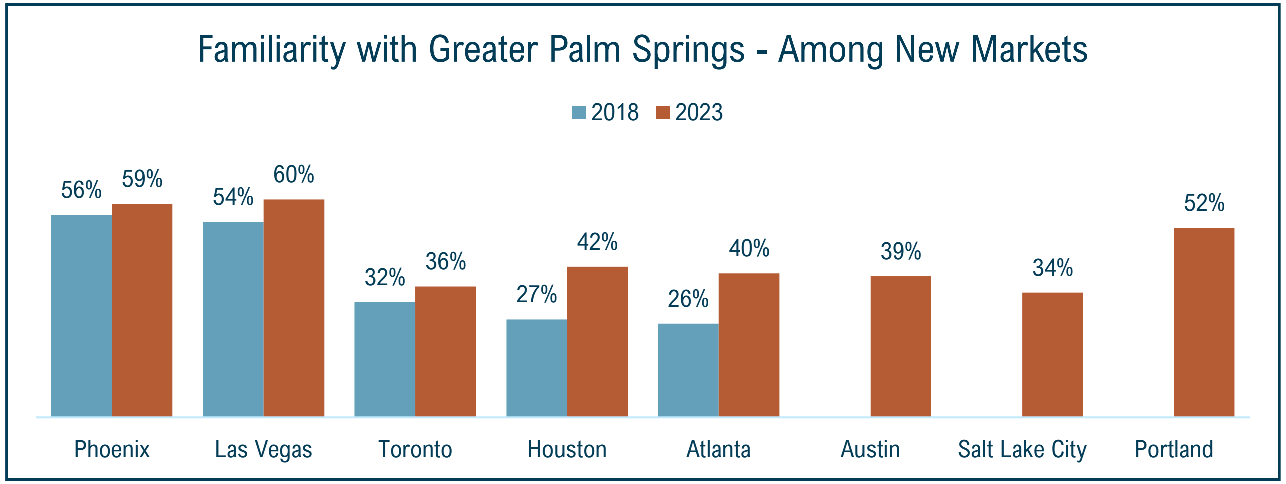




Familiarity Growth

- The prior comparison fails to illustrate the striking growth in familiarity with Greater Palm Springs since the last measure. In nearly every market, sizeable gains in familiarity were achieved.
- Changes in the competitive set make year-over-year tracking difficult, although anecdotally some competitors experienced familiarity growth.
- In part, this may also reflect the pent-up demand and interest in travel that resulted from COVID.
- Nonetheless, this result is an impressive gain among a directly comparable demographic.





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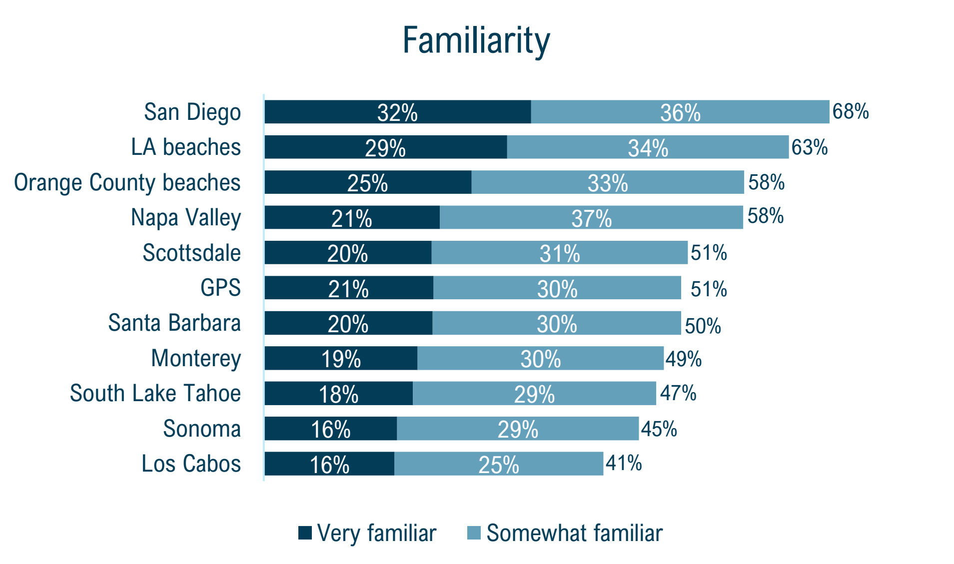
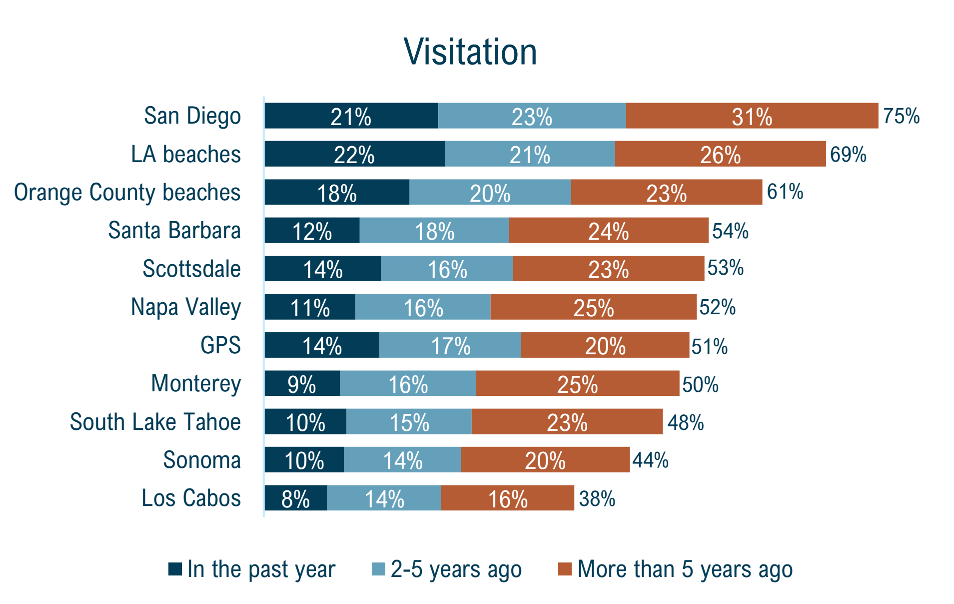
Brand Health Metrics

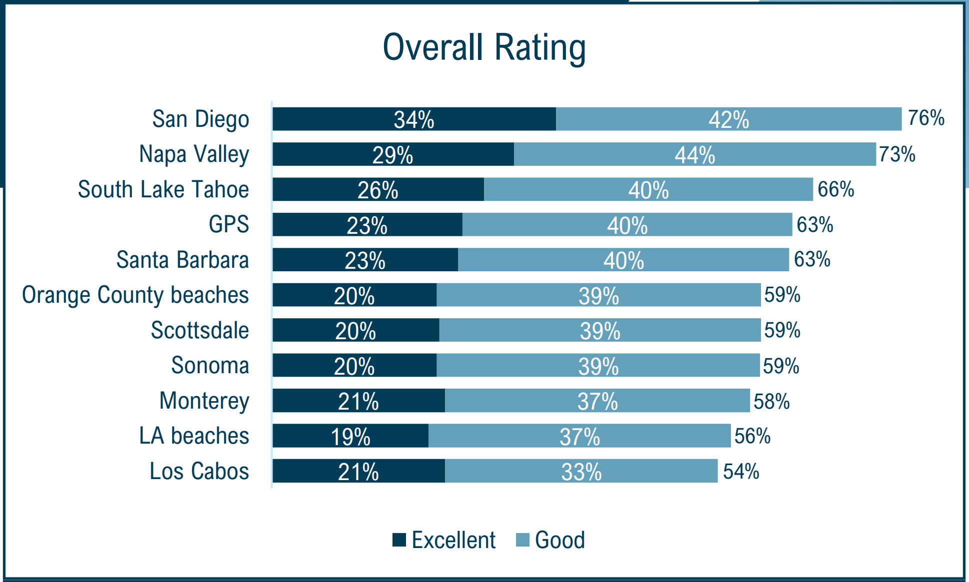
- While growth in familiarity is important to a travel brand, this needs to be viewed in context of other overall metrics like visitation, overall rating, and future likelihood to visit. Familiarity and visitation typically move together. And this is, in fact, what we see at this juncture.
- GPS ranks 7th in terms of overall top two box familiarity amongst the competitive set and holds the same rank in overall past visitation. And this pattern is true across most of the competitive set.
- The question is how, with growing familiarity, this impacts overall ratings and future interest.





Brand Health Metrics

- While the growth in familiarity is a positive, the other important yardstick is whether we see gains in overall appeal as a destination and likely visitation. These two measures, like familiarity and visitation, tend to move together.
- What is positive and interesting is that GPS ranks far better in terms of appeal and future likelihood than in the past performance metrics of familiarity and visitation. Coupled with growing familiarity, this is an indicator of a strengthening brand.
- Interestingly, GPS' performance and appeal are like those of the other smaller, most similar competitors of Napa, Tahoe, and Santa Barbara.



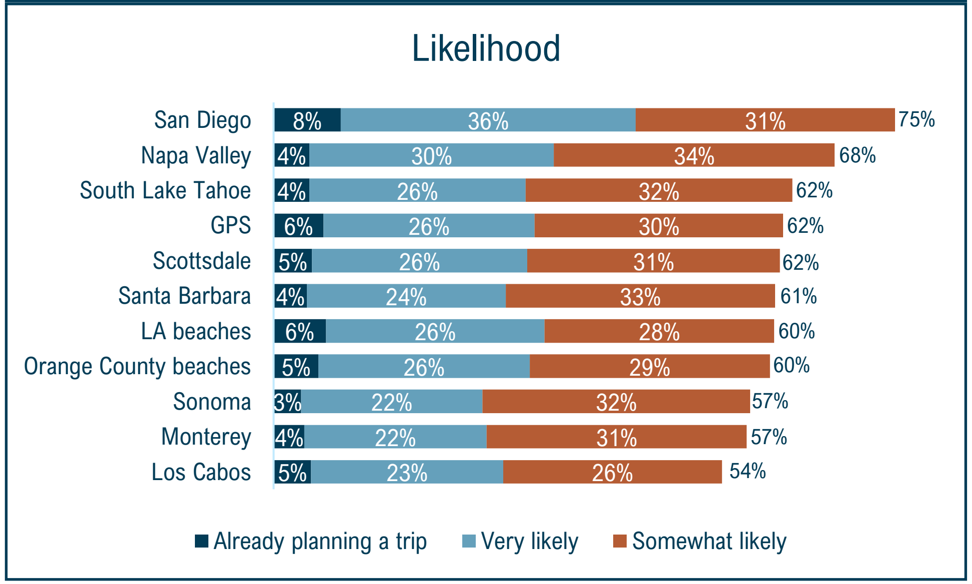


Image Perception

Image Considerations

- While the considerations of the brand health metrics clearly illustrate significant positive gains in familiarity, appeal, and likelihood to visit, understanding what is driving those appeals is essential to continuing to map a strategic communications plan that builds on these gains. That understanding can only be achieved by taking a “deep dive” into what travelers’ image perceptions are of Greater Palm Springs and its core competition.
- Image is an amorphous measure. Unlike likelihood or appeal, it cannot be characterized in a single scale. Rather it is multidimensional and is a function of the destination’s assets along with an understanding of how the place is differentiated. It’s not just what you are good at, but how that compares to others along with its desirability.
- To help paint a rich portrait of the image of Greater Palm Springs, we have approached characterizing image in a number of ways:
    1. Traditional ratings on a series of descriptive attributes
    2. Personality ratings
    3. Perceptual mapping to understand differentiations
    4. Image associations
    5. Activity appeals

Attribute Ratings

- When GPS' attribute ratings are considered in rank order, it immediately starts to characterize travelers' perceptions of this destination. The place is beautiful and relaxing with good shopping and dining. At the other end of these evaluations, GPS is not for kids, nor is it a good value for the money.
- At the same time one of the interesting things about these ratings is that they aren't exceptionally high. Typically, strong score are ratings above 4.0 – but these do not achieve that benchmark. In fact, for the most part the same is true of the competitive set. This is no doubt reflective of an upscale target audience who is more demanding or critical – or perhaps, discerning – of potential destinations.
- On the following page, the ratings of each of the competitors are compared by indexing them against the average.
- Interestingly, four destinations look both positive and similar: GPS, Monterey, Santa Barbara, and Scottsdale. They are all pretty, small, and relaxing. And three of these four had higher levels of ratings and likelihood to visit than some of the larger destinations.
- Finally, there are differences by market, but these are purely a function of familiarity.

Greater Palm Springs Area	
Has natural beauty/scenic landscape	3.99
Has a relaxing atmosphere	3.95
Has desirable dining options	3.90
Has many local and independent shops or boutiques	3.86
Is a fun place to visit	3.86
Is a great place for a health and wellness trip	3.84
Is a friendly and welcoming place	3.82
Is a good place for exploring the outdoors	3.77
Is easy to navigate/get around once I am there	3.76
Offers lots to see and do	3.72
Is unique from other communities/places	3.71
Has outlet/mall shopping	3.67
Has great nightlife and bars	3.66
Has a rich history	3.64
Has interesting architecture	3.61
Is a unique vacation experience you can't get anywhere else	3.56
Has an abundance of art galleries and museums	3.54
Has small-town charm	3.54
Has iconic or unique cuisine	3.54
Has performing arts or theaters	3.53
Is a sustainable destination	3.53
Is a great place for live music	3.52
Is a good value for the money	3.40
Is a great place for sporting events	3.20
Has many attractions for kids	3.20

Attribute ratings, YOY

- The strongest increase among image statements is that the GPS area offers lots to see and do. This is a positive finding and indicates that the marketing over the years has developed a perception of the area as a place with a rich array of experiences.
- This shift in perceptions also likely impacts the increase in views of the area as a good value. Value doesn't necessarily mean an expensive trip, rather that the trip is worth the money.
- Not all of the image statements were asked in both measures. Those shown here were, and used the same wording in 2018 and in this measure.

RATED	2018	2023	Diff
Offers lots to see and do	3.54	3.72	0.19
Is a good value for the money	3.35	3.40	0.05
Has natural beauty/scenic landscape	3.96	3.99	0.03
Is a great place for a health and wellness trip	3.82	3.84	0.02
Is easy to navigate/get around once I am there	3.81	3.76	-0.05
Has a relaxing atmosphere	4.01	3.95	-0.06

Comparative Attribute Ratings

RATED	Greater Palm Springs	Monterey County, CA	Santa Barbara, CA	Scottsdale, AZ	Napa Valley, CA	Orange County beach cities	LA County beach cities	San Diego, CA	Sonoma County, CA	South Lake Tahoe, CA	Los Cabos, Mexico
Is a great place for a health and wellness trip	107	102	101	103	100	96	90	99	102	104	96
Has outlet/mall shopping	107	99	101	107	92	105	104	107	95	94	90
Is easy to navigate/get around once I am there	106	102	103	104	100	96	89	100	102	104	94
Has small-town charm	106	107	105	100	109	90	81	90	109	108	96
Has a relaxing atmosphere	106	101	101	100	105	94	87	97	103	104	102
Has an abundance of art galleries and museums	105	104	104	103	95	100	102	106	100	93	89
Has interesting architecture	104	101	104	102	97	95	95	103	99	96	103
Has performing arts or theaters	104	102	103	101	94	102	104	107	99	94	89
Is a friendly and welcoming place	104	101	102	101	102	96	90	102	100	103	99
Has many local and independent shops or boutiques	103	100	101	100	101	99	99	101	100	98	98
Has great nightlife and bars	103	96	99	100	92	102	105	105	93	98	107
Is unique from other communities/places	103	101	99	98	104	95	93	101	100	104	100
Is a good value for the money	103	101	99	103	96	97	91	99	99	102	109
Is a sustainable destination	103	103	102	99	103	97	93	101	103	104	94
Is a great place for sporting events	102	100	99	106	86	103	108	113	94	100	89
Is a great place for live music	102	100	101	100	95	101	104	103	97	97	99
Is a unique vacation experience you can’t get anywhere else	102	102	98	98	105	95	92	100	101	106	101
Has desirable dining options	102	99	101	99	103	99	99	102	100	97	98
Has a rich history	101	102	100	98	104	93	94	105	101	100	101
Has natural beauty/scenic landscape	101	101	99	100	103	96	92	99	101	107	100
Is a fun place to visit	101	99	99	97	100	98	97	105	98	104	102
Is a good place for exploring the outdoors	101	100	99	102	100	96	93	101	100	110	98
Has iconic or unique cuisine	100	100	100	98	106	96	97	102	102	95	104
Offers lots to see and do	99	98	99	99	98	100	100	109	97	102	99
Has many attractions for kids	97	104	101	99	84	106	105	117	91	102	95

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Personality Ratings

- When a more qualitative set of descriptive words that suggest how a place "feels" are considered, there is slightly more positivism especially around being beautiful and having great weather. Beyond this, being expensive or upscale, and a clean retreat are consistent with the "nice place to relax" seen in the attributes.
- When these are viewed in the context of the competitive set, a clearer differentiation emerges of being a safe, glamorous, health- and wellness-focused oasis. In fact, the worst ratings given to GPS were the same as the average of the competitive set. And overall, the strongest performing competitors are those that did well on the brand health metrics – Santa Barbara, Lake Tahoe, and Napa.
- Interestingly, the most familiar, most visited, more urban destinations (L.A. and Orange County beaches and San Diego) don't have any of the appeal of these retreats that is delivered by the scenic beauty and pace in the smaller, niche destinations.

Greater Palm Springs	
Great weather/sunshine	4.16
Beautiful	4.02
Upscale	3.98
Clean/well-kept	3.93
Escape/Retreat	3.90
Expensive	3.89
Comfortable	3.87
Oasis	3.84
Safe	3.83
Health/Wellness-focused	3.83
Serene	3.76
Glamorous/elegant	3.75
Rejuvenating/transforming	3.74
Laid-back	3.71
LGBTQIA+ friendly	3.58
Family friendly	3.56
Slow-paced lifestyle	3.52
Pretentious	3.35

Personality ratings, YOY

- VGPS' messaging around being an oasis and a place for health and wellness leisure travel has clearly come through. Agreement with both of these personality ratings has increased since the last image measure.
- In fact, agreement with most of these personality measures has improved since the prior measure.
- Some of this year-to-year shift is a function of the level of the baseline rating. For example, family friendly has one of the lowest baseline ratings, reflecting that most consumers don't view the Greater Palm Springs area as a place to bring kids. So the fact that it has the highest increase since the last measure is more a function of there being opportunity for an increase than this has been a main element of messaging. By the same token, great weather/sunshine is still the highest rated personality metric, but it has remained more or less level across measures because most consumers associate this with the area.

Greater Palm Springs	2018	2023	Diff
Family friendly	3.41	3.56	0.15
Glamorous/elegant	3.62	3.75	0.13
Expensive	3.76	3.89	0.13
Beautiful	3.90	4.02	0.12
Rejuvenating/transforming	3.63	3.74	0.11
LGBTQ+ (Gay) friendly	3.48	3.58	0.10
Health/Wellness-focused	3.73	3.83	0.10
Serene	3.72	3.76	0.04
Oasis	3.80	3.84	0.04
Upscale	3.94	3.98	0.04
Comfortable	3.84	3.87	0.03
Escape/Retreat	3.90	3.90	0.00
Laid-back	3.71	3.71	0.00
Clean/well-kept	3.93	3.93	0.00
Great weather/sunshine	4.18	4.16	-0.02
Slow-paced lifestyle	3.63	3.52	-0.11
Safe	3.95	3.83	-0.12

Comparative Ratings

	Greater Palm Springs	Monterey County, CA	Santa Barbara, CA	Scottsdale, AZ	Napa Valley, CA	Orange County beach cities	LA County beach cities	San Diego, CA	Sonoma County, CA	South Lake Tahoe, CA	Los Cabos, Mexico
Oasis	109	100	99	100	102	95	87	95	102	104	106
Health/Wellness-focused	108	101	103	102	99	99	93	98	102	103	93
Safe	107	105	105	104	107	96	84	96	106	106	84
Glamorous/elegant	107	100	106	97	107	98	94	95	103	99	94
Upscale	107	101	105	99	109	100	95	95	102	98	89
Slow-paced lifestyle	106	104	102	102	108	92	82	92	107	103	102
Clean/well-kept	106	103	104	104	106	96	84	96	105	105	90
Rejuvenating/transforming	106	101	102	100	102	95	89	97	102	105	100
Escape/Retreat	105	100	100	100	105	95	87	96	102	105	104
LGBTQIA+ friendly	105	100	102	91	100	102	108	105	100	95	91
Serene	104	103	102	101	106	95	85	93	104	107	99
Laid-back	104	103	101	100	102	94	90	98	102	102	103
Pretentious	104	101	103	96	107	105	106	92	104	97	86
Comfortable	103	101	102	100	102	97	90	101	102	104	99
Expensive	101	99	104	94	107	103	104	102	101	99	87
Great weather/sunshine	101	96	101	99	100	102	100	104	97	96	102
Beautiful	100	101	102	98	104	96	91	100	101	106	101
Family friendly	100	103	102	103	88	103	97	109	94	106	95

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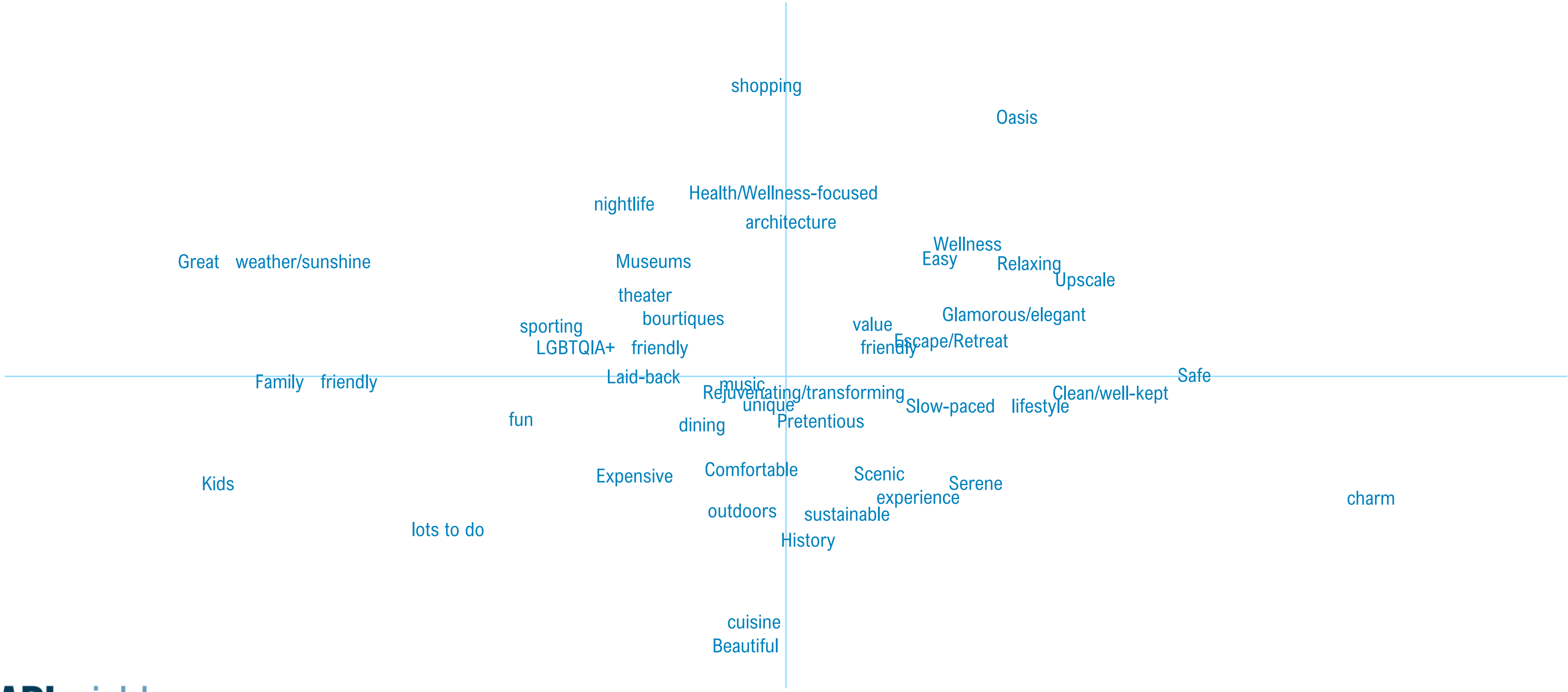
Perceptual Mapping

- While having consumers rate the destinations on a host of attributes provides depth of information, it also provides challenges in analysis.
- Consumers don't typically go through a checklist of attributes to consider where they want to go. Rather they have synthesized their image of a place and tend to consider categories of places depending on what they want for a trip or experience.
- To better represent the consumer thought process, a statistical technique called perceptual mapping is used. This technique plots all the attributes, as well as the destinations, based on the ratings and their inter-relationships.
- Attributes are plotted on the map based on a combination of how closely they track with other ratings – or where there are significant differences. The same is true for the destinations. A destination might be "pulled" toward a place in the map based on its high rating for a specific attribute, or it might be "pushed" away because it gets a low rating. The resulting map provides a more meaningful way to consider the key considerations for consumers and to understand the competitive situation and issues.
- First, we plot the attributes (represented by keywords on the next page) according to how travelers rate them. Then we evaluate each quadrant and determine its theme. Finally, we plot GPS and the competitor destinations on the map.

Perceptual Map – Layer 1: Attributes



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Layer 2: Landscape Quadrants

The quadrants

Culture

Characterized by museums, theater, and nightlife along with great weather

Oasis

Characterized by an upscale, relaxed escape

Fun

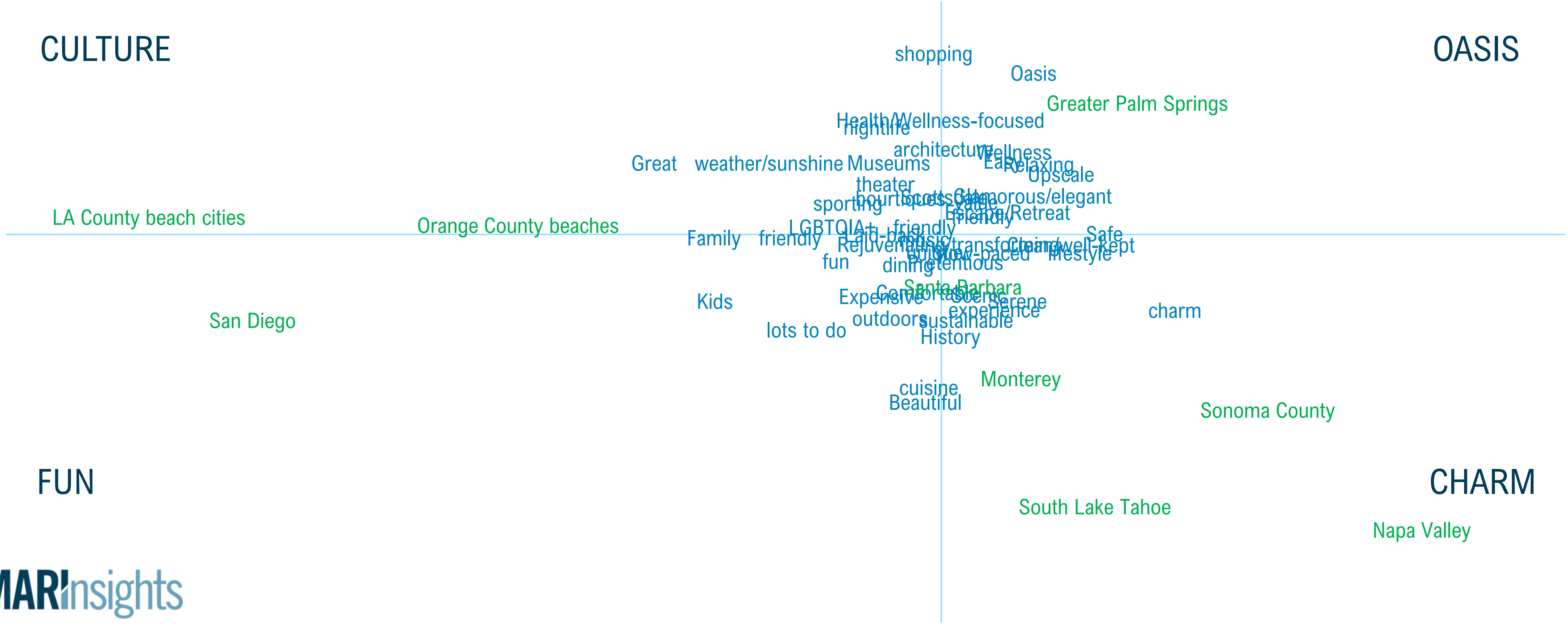
Characterized by being fun, family friendly, and appealing to kids with lots to do

Charm

Characterized by being beautiful, scenic, with a slower-paced lifestyle experience

Perceptual Map – Layer 3: Competitive Differentiation

- When plotted on this map, GPS is clearly well differentiated and essentially owns the Oasis quadrant. The larger destinations (including the beaches and San Diego) simply have more to do, which separates them. The remaining smaller niche destinations all share the Charm quadrant, with Santa Barbara and Monterey being the closest GPS competitors.



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Envisioned Behavior

- Another lens though which an understanding of travel perceptions can be elicited is by considering the activities that respondents imagine they would participate in if they were to visit. This provides another dimension of the perceived flavor of the place.
- For GPS, the same theme comes through: a place to relax, sit by the pool, and dine.
- Interestingly, the competitive context changes this somewhat with the lower level of participation in golf, tennis, and gambling being comparatively high versus these other destinations. This strength is perhaps more a reflection of these not being particularly thought of for the competitive set.
- Importantly, however, this is followed by spa, yoga, meditation, and sitting by the pool.

Greater Palm Springs	
Relaxing or simply doing nothing at all	50%
Spending time at the pool	49%
Fine dining or eating at a unique local restaurant	46%
Sightseeing	46%
Nature walks, wildlife watching, stargazing	46%
Shopping	43%
Local cuisine – farm-to-table	39%
Visiting national parks, monuments	38%
Driving on scenic byways or roads	35%
Festival – music, food, arts, etc.	32%
Participating in active outdoor activities such as hiking, biking, etc.	32%
Visiting historical sites	31%
Experiencing the local heritage and unique culture of the area	30%
Going to a spa or participating in other rejuvenation-focused activities	28%
Visiting an attraction such as a zoo or water park	25%
Arts activities such as museums, theater performances	24%
Going to an event (entertainment, sporting, etc.)	23%
Going to nightclubs or bars	19%
Visiting activities that are fun for children	18%
Yoga, meditation, and other wellness experiences	17%
Playing golf	17%
Going to casinos	17%
Taking an organized tour	14%
Eco-friendly hotel offerings	12%
Sustainable experiences	11%
Playing tennis	9%

Envisioned Behavior in Competitor Destinations

	Greater Palm Springs	Monterey County, CA	Santa Barbara, CA	Scottsdale, AZ	Napa Valley, CA	Orange County beach cities	LA County beach cities	San Diego, CA	Sonoma County, CA	South Lake Tahoe, CA	Los Cabos, Mexico
Playing golf	163	116	92	151	66	81	61	100	101	95	73
Playing tennis	159	111	103	91	71	91	82	91	112	85	104
Going to casinos	147	98	87	138	71	76	67	87	81	178	71
Going to a spa or participating in other rejuvenation-focused activities	137	77	110	103	103	91	67	86	99	104	123
Yoga, meditation, and other wellness experiences	135	108	107	101	91	97	79	72	105	103	102
Spending time at the pool	133	81	95	115	71	110	102	103	77	68	144
Going to nightclubs or bars	122	71	94	93	80	101	126	116	74	88	135
Eco-friendly hotel offerings	120	121	114	92	101	88	69	86	99	102	106
Visiting national parks, monuments	119	119	102	127	81	86	83	116	87	115	64
Shopping	116	89	110	107	97	113	113	111	87	66	90
Festival – music, food, arts, etc.	115	90	106	105	111	97	101	110	105	74	86
Arts activities such as museums, theater performances	114	103	127	117	82	96	103	129	89	80	60
Going to an event (entertainment, sporting, etc.)	110	72	113	127	76	119	129	133	82	79	59
Relaxing or simply doing nothing at all	110	90	98	99	93	106	96	99	93	101	115
Nature walks, wildlife watching, stargazing	110	102	108	109	103	92	76	98	98	127	78
Visiting activities that are fun for children	108	102	110	96	62	125	110	133	70	93	91
Fine dining or eating at a unique local restaurant	106	89	103	96	129	105	95	97	105	81	94
Participating in active outdoor activities such as hiking, biking, off-roading, etc.	105	92	102	108	79	87	88	102	103	140	92
Visiting historical sites	104	103	109	128	96	85	81	122	87	92	93
Sustainable experiences	103	107	98	92	119	91	72	99	137	100	82
Local cuisine – farm-to-table	102	95	100	96	144	88	84	97	117	84	94
Visiting an attraction such as a zoo or water park	100	109	101	104	59	118	115	205	64	61	63
Sightseeing	96	103	111	100	100	92	94	120	96	98	90
Driving on scenic byways or roads	95	102	112	98	122	102	93	99	112	114	51
Experiencing the local heritage and unique culture of the area	93	98	105	107	122	84	70	103	104	86	128
Taking an organized tour	88	86	79	92	159	67	74	105	121	84	145

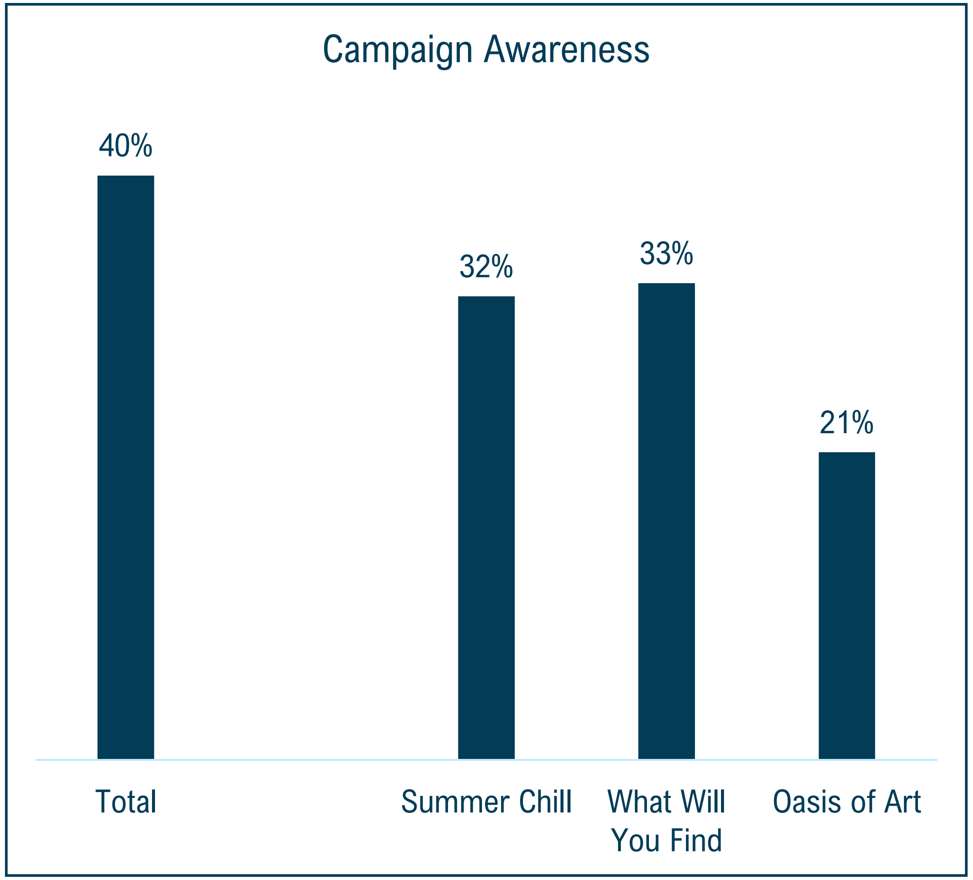
Advertising Effectiveness

Campaigns Tested

- Since the spring of last year, GPS has implemented four different campaign efforts. Two of these were seasonal and fairly broadly targeted – the *Summer Chill* campaign and the *What Will You Find* campaign.
- *Summer Chill* ran from May through September of 2022 in most markets and represented about $1 million in spending, including TV and OOH. *What Will You Find* ran from September until this spring with a $2.2 million spend.

- Among the more local drive markets, there was an always-on *Oasis of Art* campaign.
- And a campaign for locals communicated the benefits of tourism.

Campaign Awareness

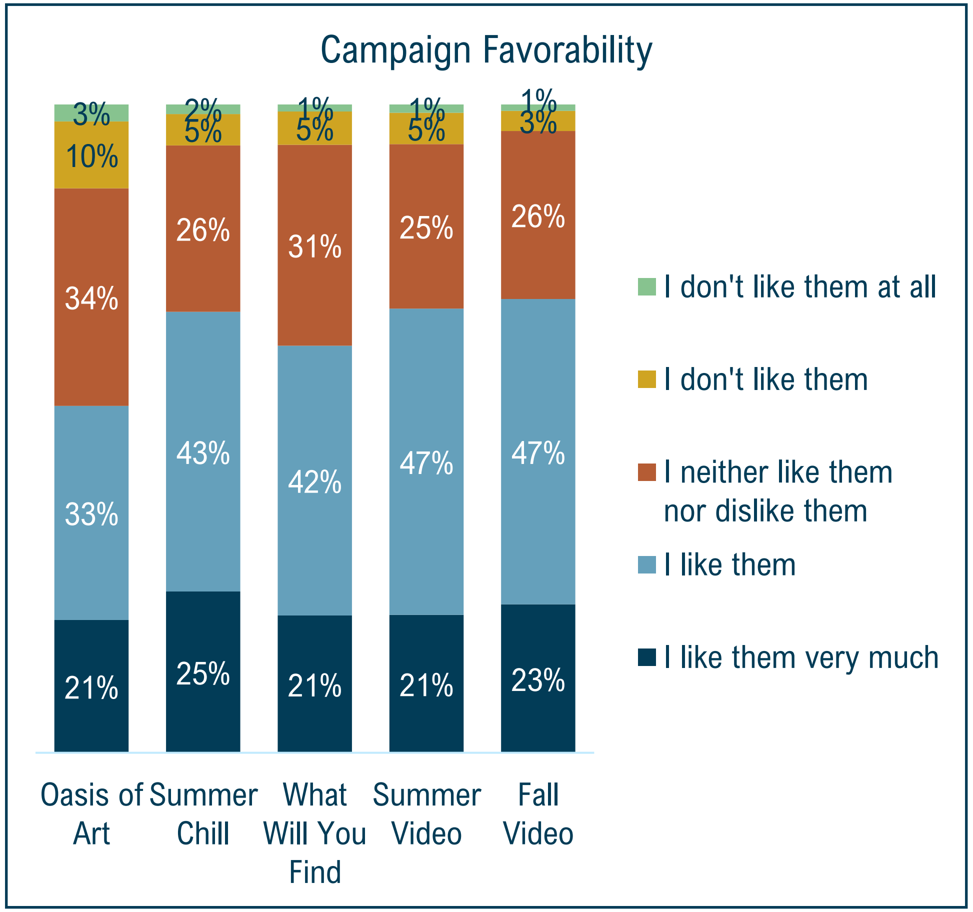


- Overall, 40% of those surveyed were exposed to at least one of the campaign efforts.
- Individually, the campaigns ran in different markets with different targets and messaging strategies.
- Nonetheless, their relative reach is reflective of the market sizes and media spending levels.

SMARInsights

Ad Favorability

- The overall reactions to the campaigns mirror the evaluations of many of the images tested.
- The Summer Chill campaign used the images that were best liked, and the Oasis of Art campaign visuals were least well received. The ad favorability reflects that.
- And as should be expected, the videos were slightly better received and reached a target goal of 70% positive response.

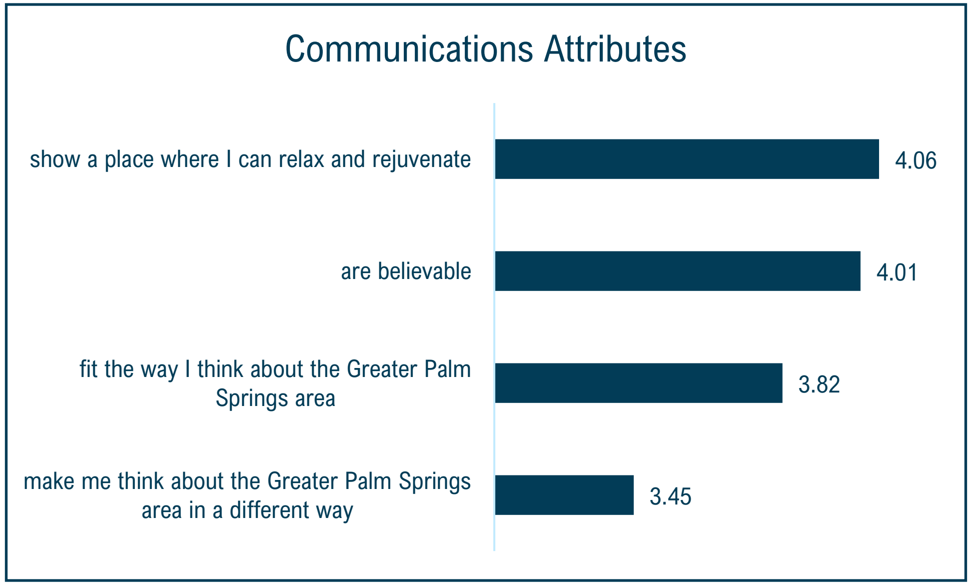


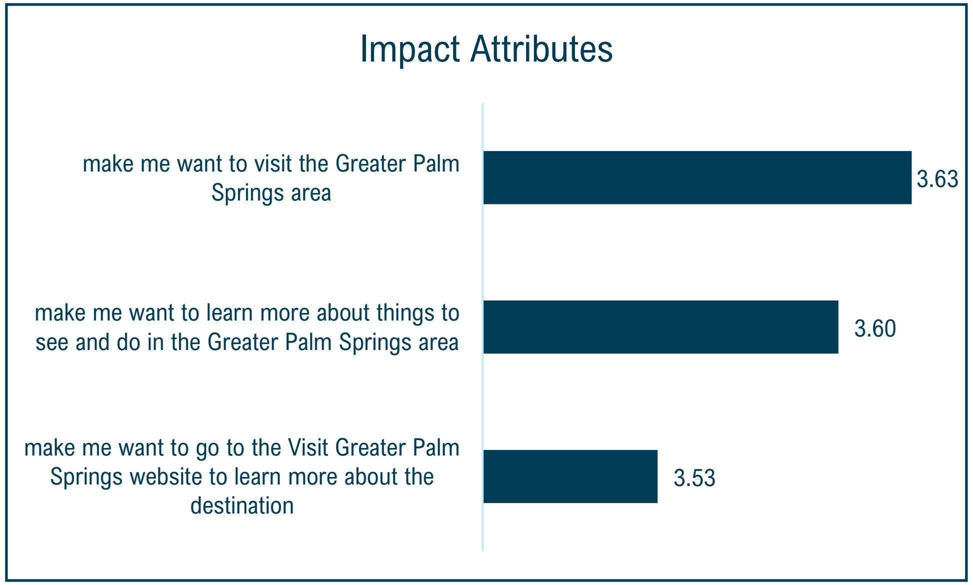
SMARInsights

Creative Ratings

- Taken as a whole, these campaigns perform well in terms of communicating relaxation and being believable. Basically, the ads communicate what travelers think about the area but certainly not in a different way. As a result, in terms of their motivational impact, the ads' performance is average.

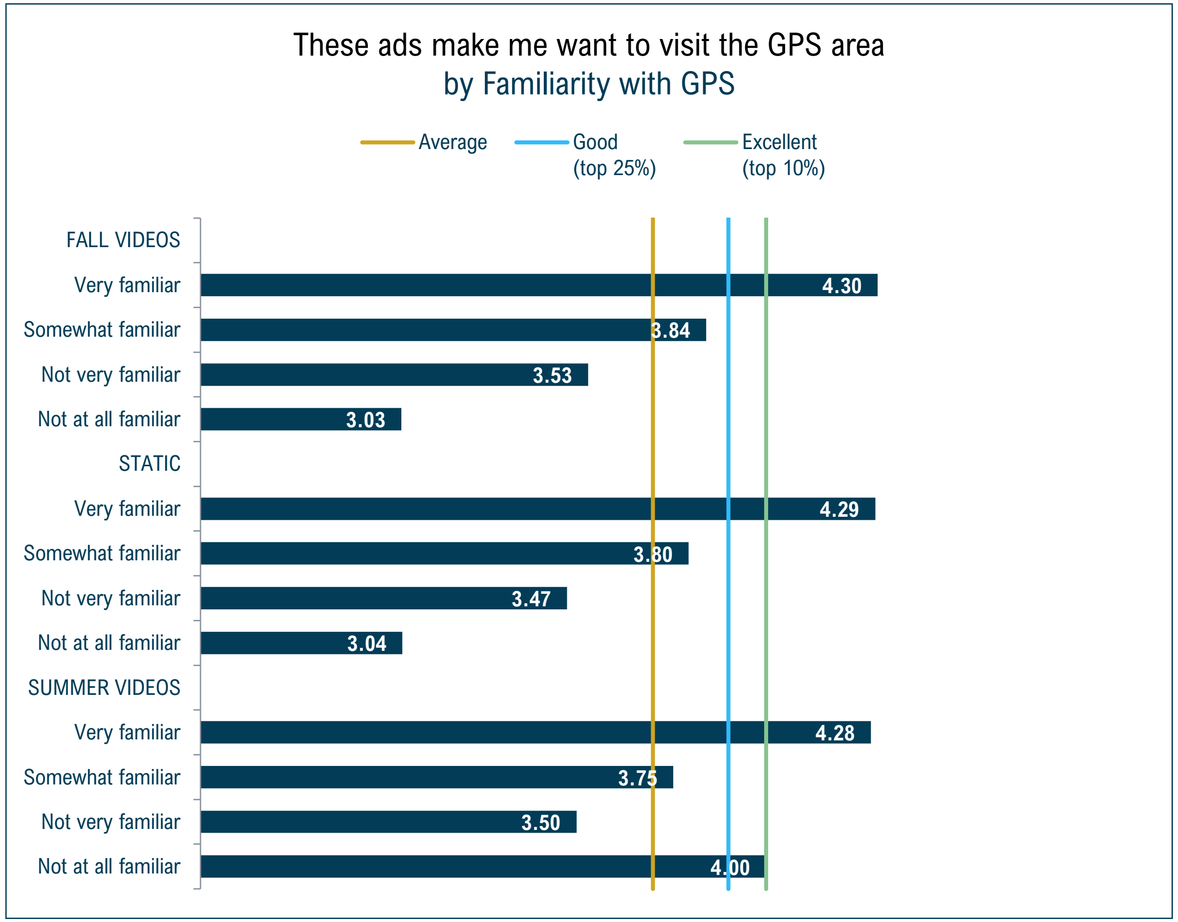
Benchmarks	Communications	Impact
Excellent (Top 10%)	4.2	4.0
Good (Top 25%)	4.0	3.9
Average	3.8	3.7





The ads are more motivating to those who are familiar with GPS

- Echoing that result, if we look at the ratings for “These ads make me want to visit the GPS area,” ratings among those or who are already familiar with the area are in the top 10%. But among those who are not familiar with area, ratings are well below average.
- This can be an indicator that the ads are not providing sufficient information to educate those unfamiliar with the area. Some destinations even develop advertising specifically aimed at introducing new consumers to the area – while continuing to run ads aimed at reminding familiar travelers what they love about the area. There could be some value in considering such an approach here.



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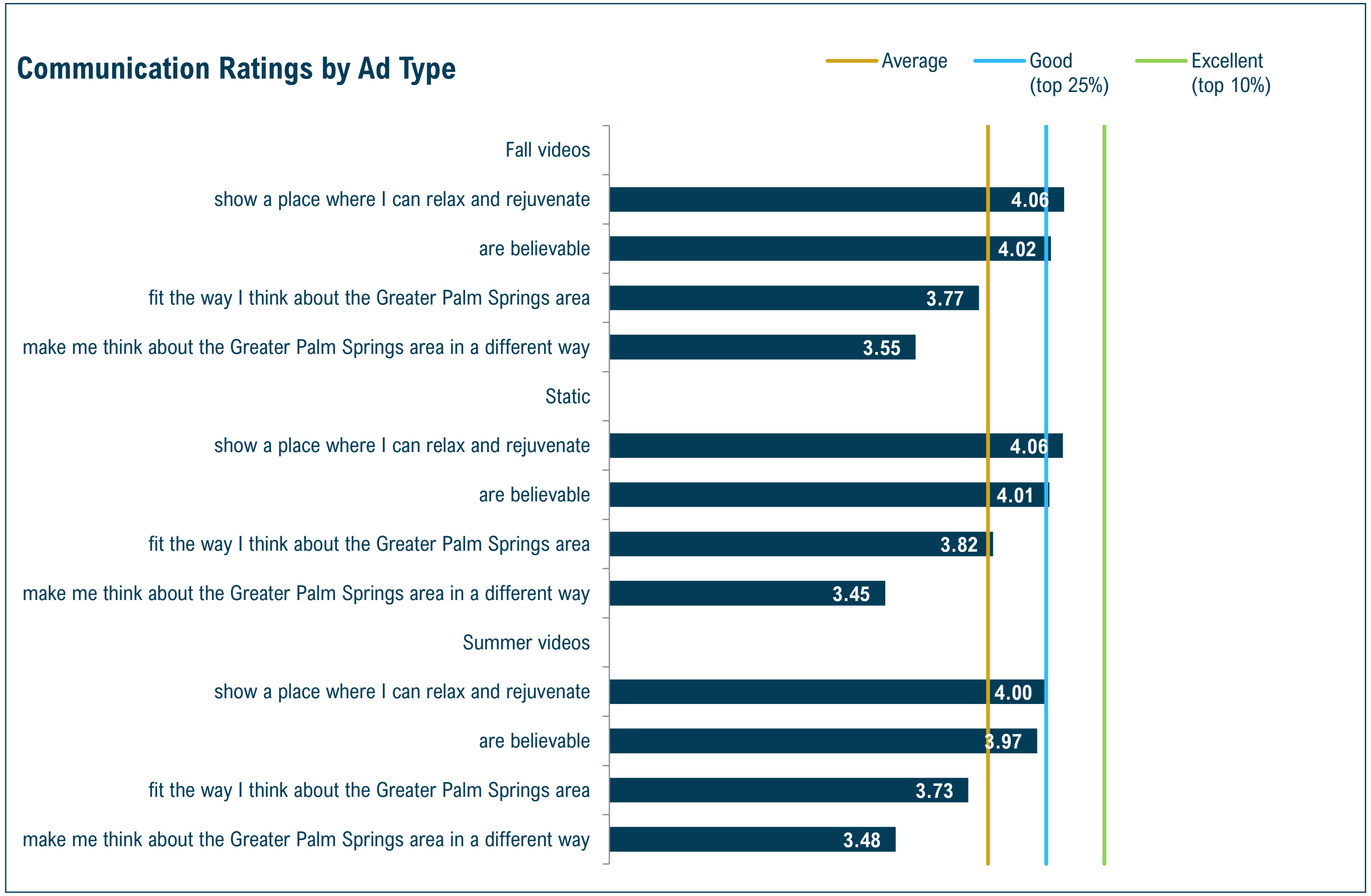
Fall videos do a marginally better job communicating key messaging

- All three types of ads are in the top 25% for showing GPS as a place where consumers can relax and rejuvenate, and nearly as strong for being believable.
- However, in part because of the wide range of ratings by familiarity, agreement that the ads fit current perceptions versus broaden perceptions are mixed.



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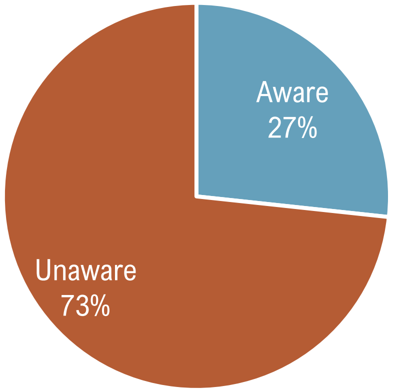
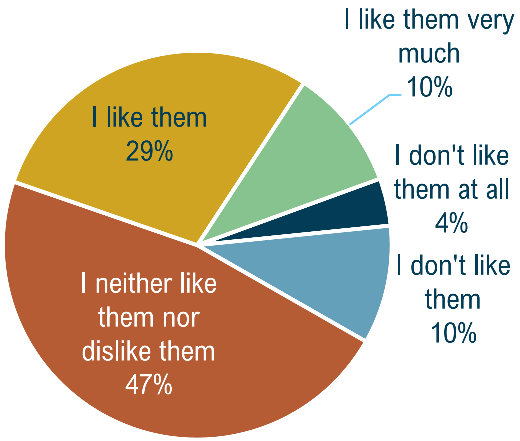
Local Campaign

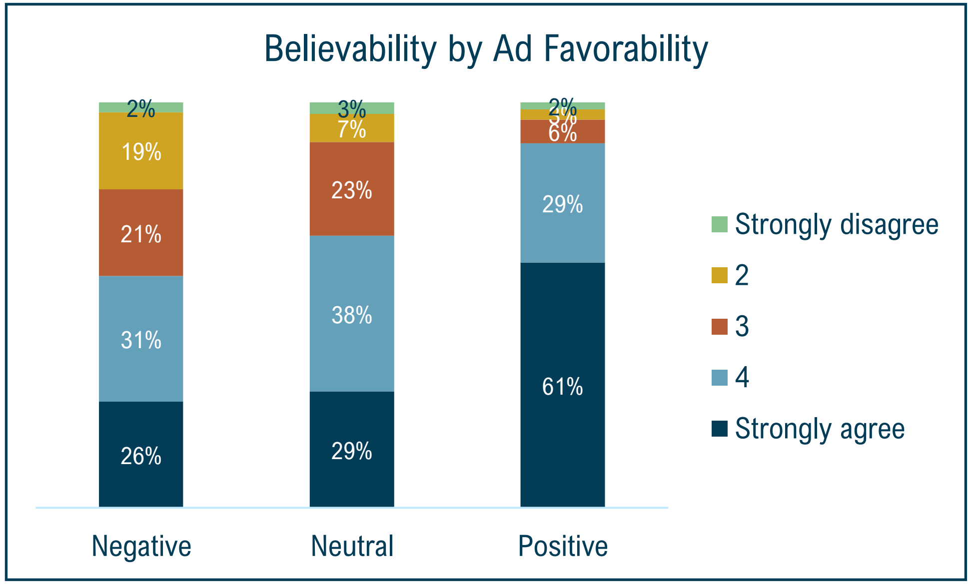
- In addition to targeted promotions to motivate travel to the area, a campaign was also targeted to local residents to communicate the value of tourism to the economy as well as promote job opportunities. This campaign reached more than a quarter of local residents. Not surprisingly it was not as well liked as the travel ads, being an informational effort as opposed to promotion of a relaxing destination. In fact, fewer than 40% had a favorable reaction to the ads. And ultimately it would appear part of this is a function of believability.

'Did You Know' Awareness



Ad Favorability





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Trip Spending

- Visitors to Greater Palm Springs spent an average of $1,827 in the destination.
- Lodging and accommodations are typically the largest share of leisure spending in a given trip. And this line item is usually between a quarter and a third of overall trip expenditures. This year we see a slightly higher share, likely due to higher ADRs.
- While this is a strong spending amount, it should be noted that in the current economy, everything costs more. So going forward, we wouldn't necessarily expect trip spending to remain at this level should prices return to a more normal level.

Average trip spending	$	Share of total
Lodging/Accommodations	681	37%
Meals/Food/Groceries	352	19%
Shopping	283	15%
Activities/Attractions	252	14%
Entertainment such as shows, theater, festivals, concerts	138	8%
Transportation within the Greater Palm Springs area	121	7%
Total	**1,827**	

Return on Investment

- Prior evaluations of GPS' ad effectiveness were made relative to the fly and drive markets and their seasonality. In this measure, however, given the multiple campaign and overlapping geographies, no individual assessments can be made.
- Overall, however, the performance still compares quite favorably. With the inclusion of more markets than in the past and a comparatively larger spend, the campaign reached more than 14 million households. In terms of a cost-per-aware household, this is better than average at $0.22.
- And since the last measure in 2019, the trip spending exhibits a sizeable increase.
- The net result is an ROI in excess of $800, well above the fly market performance of 2019 of $570.

Traveling households	35,532,892
Awareness	40.6%
Aware households	14,426,354
Incremental Travel	10.0%
Incremental trips	1,442,635
Trip spending	$1,827
Total Incremental Spending	$2,635,694,922
Ad spend	$3,272,000
ROI	**$805.53**

Lodging

- The vast majority of visitors stay in paid accommodations, although some use a combination of paid and friends/family accommodations. Of those who stay in paid combinations, 65% stay in hotels or resorts. Since the last measure high-end full-service hotels have gained market share.
- Among those who do not prefer hotels, Airbnb and other sharing properties account for 13% of in-market stays, while vacation rentals/timeshares trail at 11%.