

BOARD AND JPA MEETING

Friday, May 21, 2021

RENAISSANCE®

ESMERALDA RESORT & SPA
INDIAN WELLS

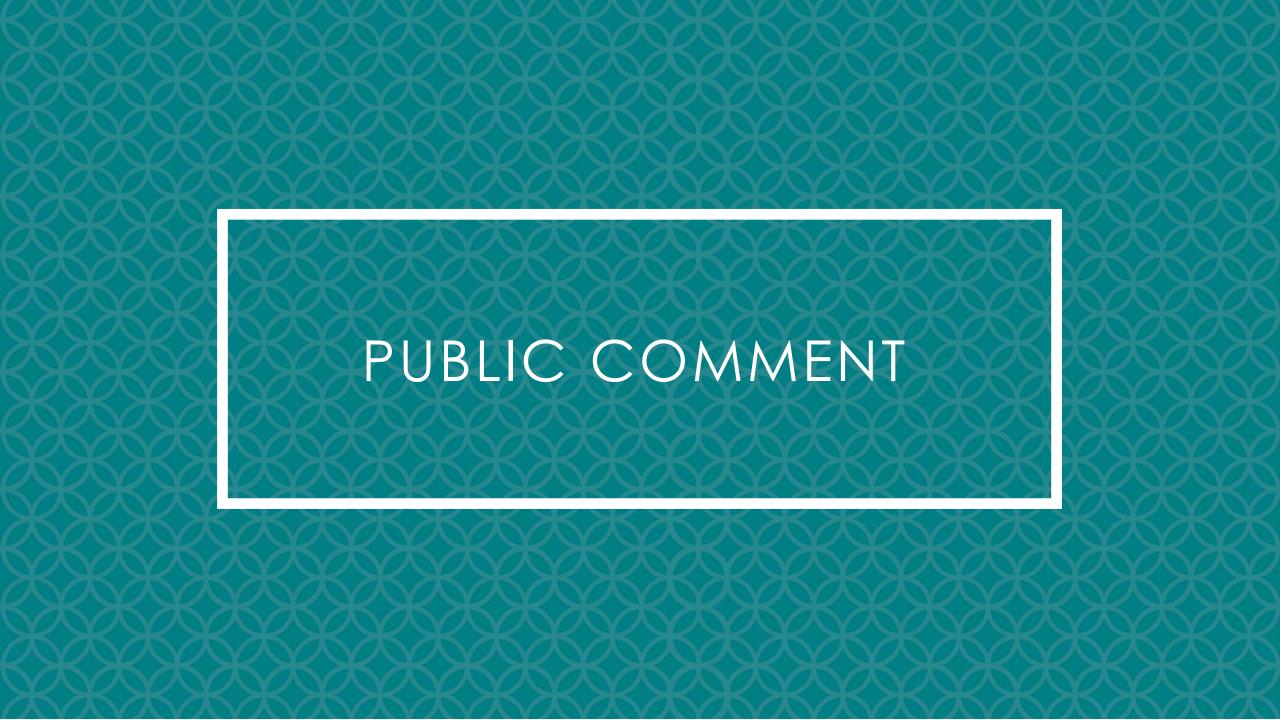






CONFIRMATION OF AGENDA

(NO VOTE REQUIRED)



MIKE MCGUIRE, CALIFORNIA STATE SENATOR

ERIN FRANCIS-CUMMINGS, PRESIDENT & CEO DESTINATION ANALYSTS



RESEARCH METHODOLOGY

Online Survey of Leisure Travelers in Key Markets.

Respondents were screened for the following requirements:

- Adults age 18+
- Residents of target geographic markets
- Took at least two (2) overnight leisure trip (50-miles or more away from home) in the past 2 years in which AT LEAST 2 nights were spent away from home
- Plans to take at least two (2) such trips in the next 2 years
- Neutral, Interested or Very interested in desert destinations

Survey fielded: April 12th - May 2nd, 2021

DMA	Sample Size
Los Angeles County	300
San Francisco-Bay Area	300
Phoenix	300
Las Vegas	300
Denver	300
Dallas	300
St. Louis	300
New York City	300
TOTAL SAMPLE	2,400

RESEARCH OVERVIEW & OBJECTIVES

The primary objective of this research: to explore current perceptions, aspirations and plans to visit Greater Palm Springs.

- Identify key travel motivators and sources of inspiration
- Benchmark awareness, familiarity, appeal and likelihood to

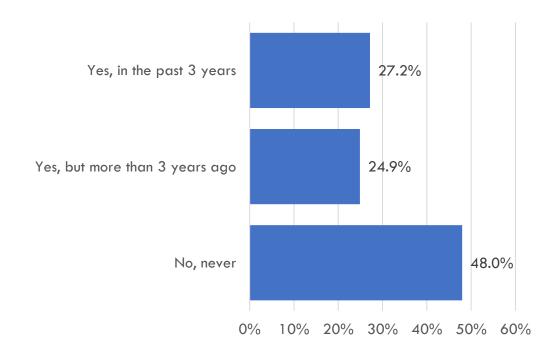
visit

Measure future travel intentions





PAST VISITATION TO GREATER PALM SPRINGS



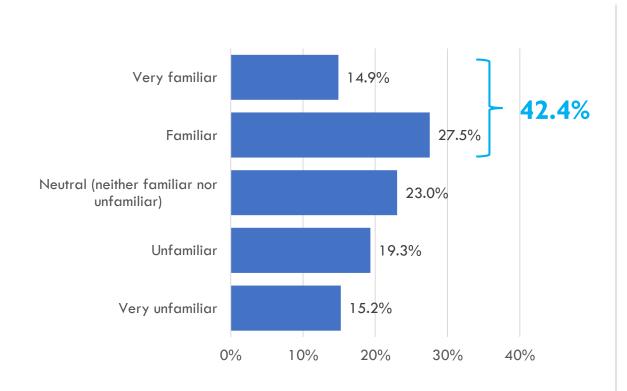
Detail by Market

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Yes, in the past 3 years	46.9%	24.0%	23.4%	30.7%	12.4%	24.5%	6.9%	20.3%
Yes, but more than 3 years ago	28.9%	36.4%	37.4%	26.1%	26.5%	22.8%	17.8%	17.7%
No, never	24.1%	39.6%	39.3%	43.1%	61.1%	52.6%	75.3%	62.0%
Base	311	313	321	306	306	302	304	300

Q: Have you visited the Greater Palm Springs region before? (Select one) Base: All respondents



FAMILIARITY WITH GREATER PALM SPRINGS

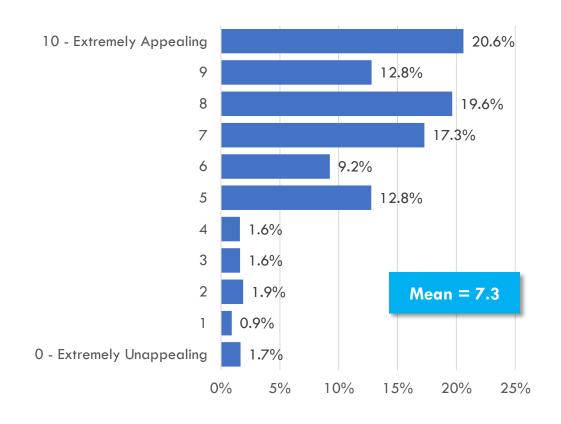


Q: How familiar are you with the things to see and do in the Greater Palm Springs region? (Select one) Base: All respondents

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Top-Two	48.2%	32.5%	38.0%	42.1%	29.1%	46.3%	18.8%	47.3%
Bottom-Two	22.8%	35.8%	39.0%	35.0%	46.7%	35.1%	59.8%	35.3%
Base	311	313	321	306	306	302	304	300



APPEAL OF GREATER PALM SPRINGS AS A LEISURE DESTINATION

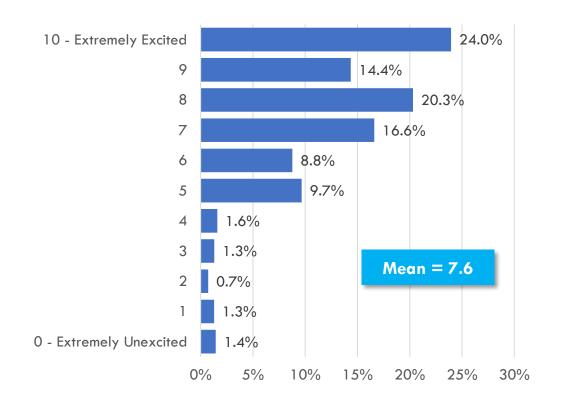


Q: Given what you currently know, how appealing do you find the Greater Palm Springs area as a place to visit for leisure? (Select one) Base: All respondents

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Top-Two	33.8%	21.4%	13.8%	17.5%	25.5%	41.1%	22.4%	29.3%
Mean	7.5	6.9	6.9	7.0	6.8	7.9	6.7	7.6
Base	311	313	321	306	306	302	304	300



EXCITEMENT TO VISIT GREATER PALM SPRINGS

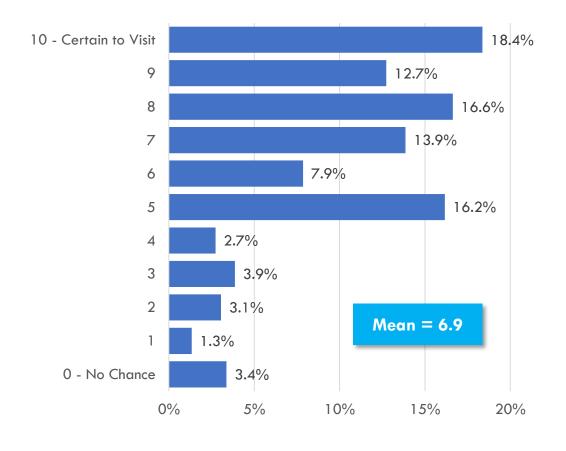


Q: If your traveling companion asked you to take a trip to the Greater Palm Springs area for leisure, how excited would you be? (Select one) Base: All respondents

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Top-Two	33.8%	27.2%	33.6%	36.6%	35.3%	50.0%	34.8%	43.4%
Mean	7.6	7.3	7.2	<i>7</i> .3	<i>7</i> .3	8.2	<i>7</i> .3	7.8
Base	311	313	321	306	306	302	304	300



LIKELIHOOD TO VISIT GREATER PALM SPRINGS (NEXT 3 YEARS)



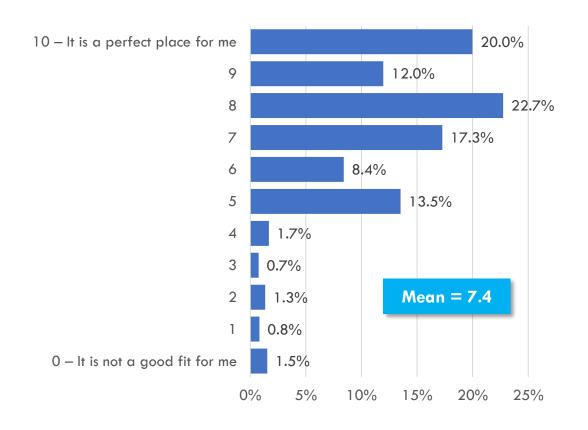
Detail by Market

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Top-Two	37.6%	22.7%	24.9%	31.3%	16.6%	39.8%	12.8%	32.7%
Mean	7.5	6.6	6.4	6.8	5.9	7.3	5.3	6.9
Base	311	313	321	306	306	302	304	300

Q: How likely are you to visit the Greater Palm Springs area for leisure in the next three (3) years? (Select one) Base: All respondents



PERSONAL ALIGNMENT WITH THE GREATER PALM SPRINGS DESTINATION BRAND



Detail by Market

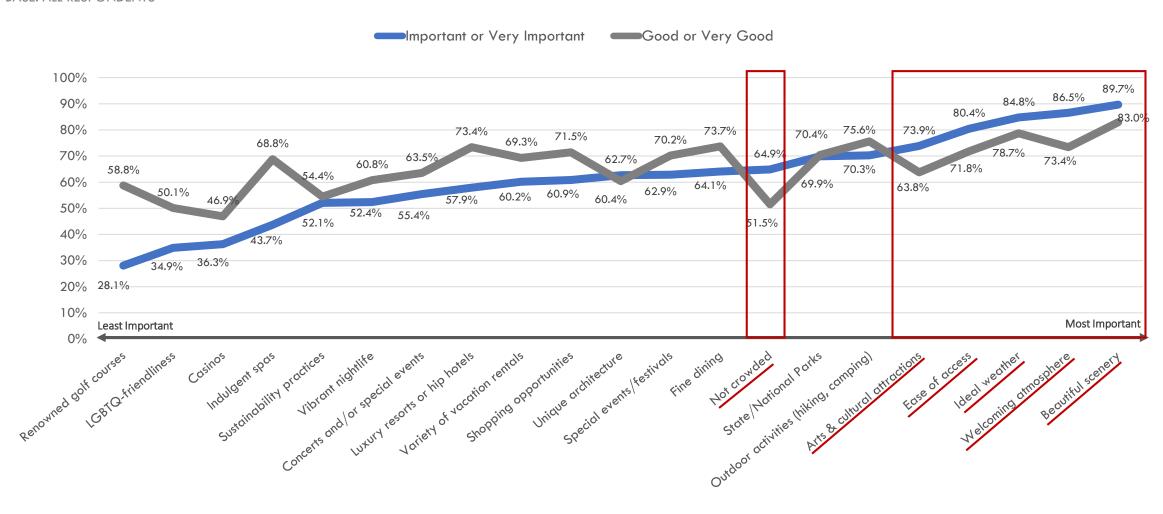
	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Top-Two	27.9%	18.9%	24.9%	32.7%	27.1%	44.4%	22.4%	38.0%
Mean	7.5	7.0	7.0	7.2	6.9	8.0	6.8	7.6
Base	311	313	321	306	306	302	304	300

Q: To what degree is the Greater Palm Springs area an ideal place to visit for travelers like you? Base: All respondents



ATTRIBUTE RATING VS. IMPORTANCE TO DESTINATION SELECTION

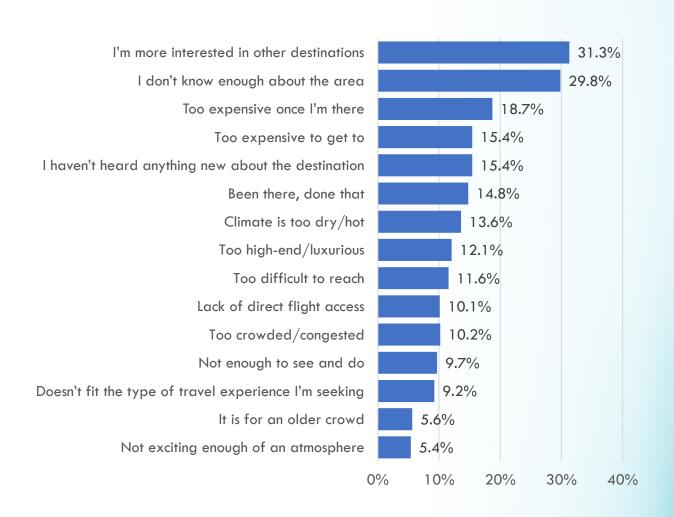
BASE: ALL RESPONDENTS



Q1: Please rate the Greater Palm Springs region as a leisure destination for the following attributes using the scale below. Even if you are unfamiliar with the Greater Palm Springs region, please answer based on your current perception. Q2: How important would each generally be in selecting a destination you would visit for leisure? Please use the scale below.



DETERRENTS TO VISITING GREATER PALM SPRINGS



Q: Which are reasons you have not visited the Greater Palm Springs area more often? (Select all that apply) Base: All respondents



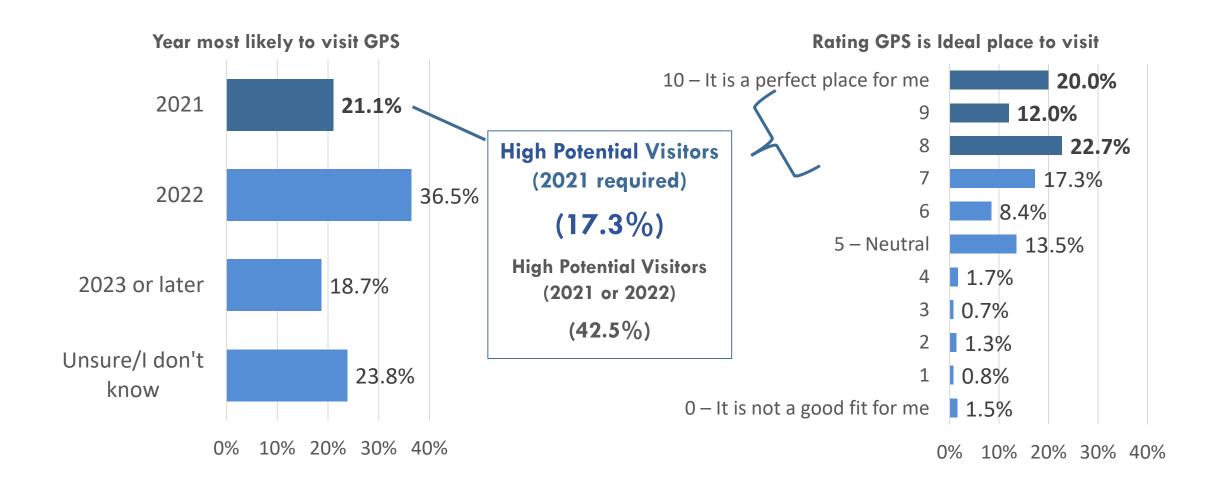




IDENTIFYING PALM SPRINGS' HIGH POTENTIAL VISITORS



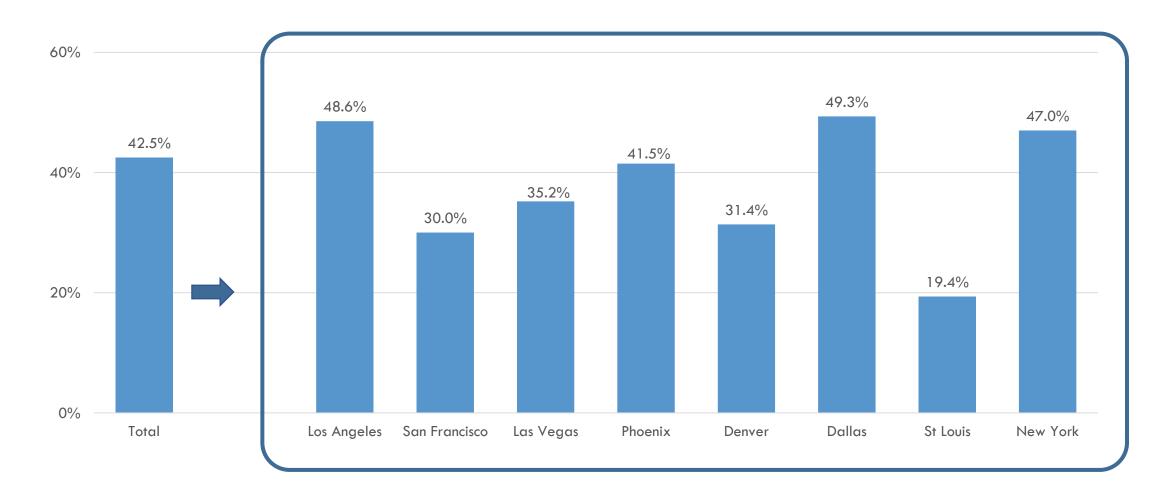
HIGH POTENTIAL IDENTIFICATION



HIGH POTENTIAL VISITORS BY MARKET

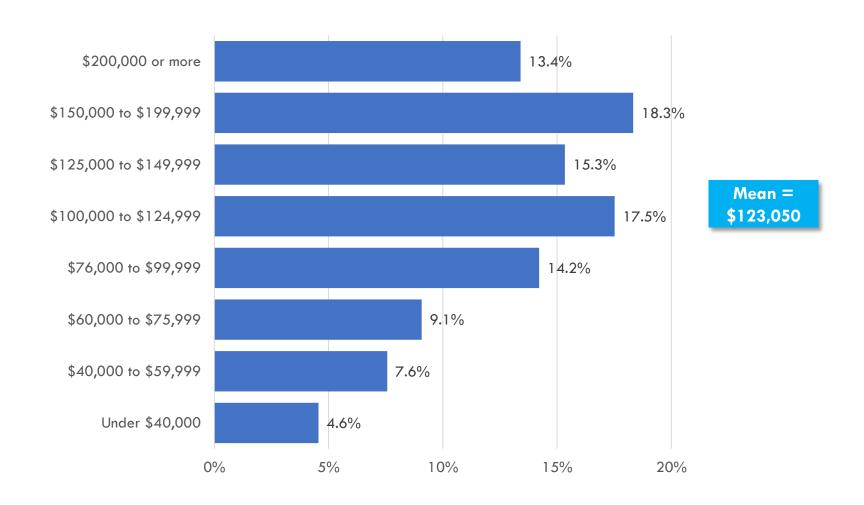
Figure: High Potential Visitors by Market

% of each segment that gave GPS a Top 3 Box rating and most likely to visit in 2021 or 2022





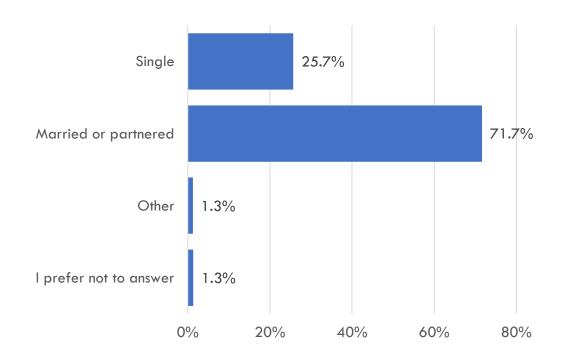
COMBINED ANNUAL HOUSEHOLD INCOME



Q: Which best describes the combined annual income of all members of your household? (Select one) Base: High Potential Visitor 2021/2022



MARITAL STATUS

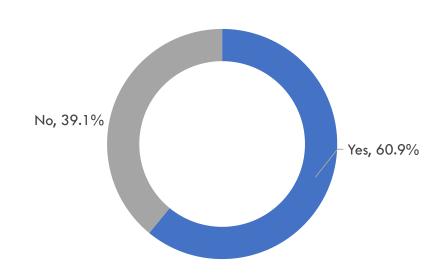


Q: Which of the following best describes your current marital status? (Select one) Base: High Potential Visitor 2021/2022

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Single	37.1%	35.1%	29.2%	26.0%	14.6%	14.1%	27.1%	20.6%
Married or partnered	58.3%	63.8%	68.1%	69.3%	78.1%	84.6%	71.2%	78.7%
Other	2.0%	1.1%	1.8%	3.1%	4.2%	0.7%	1.7%	0.0%
I prefer not to answer	2.6%	0.0%	0.9%	1.6%	3.1%	0.7%	0.0%	0.7%
Base	151	94	113	127	96	149	59	141



CHILDREN IN HOUSEHOLD



Q: Do you have children under the age of 18 in your home? Base: High Potential Visitor 2021/2022

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
Yes	49.7%	47.9%	46.0%	53.5%	70.8%	77.9%	50.8%	68.1%
No	50.3%	52.1%	54.0%	46.5%	29.2%	22.1%	49.2%	31.9%
Base	151	94	113	127	96	149	59	141



Please think specifically about Southern California.

Name one destination in this region that you most want to visit in the next two years.



GREATER PALM SPRINGS COMPETITIVE SITUATION: MOST DESIRED SOUTHERN CALIFORNIA DESTINATION





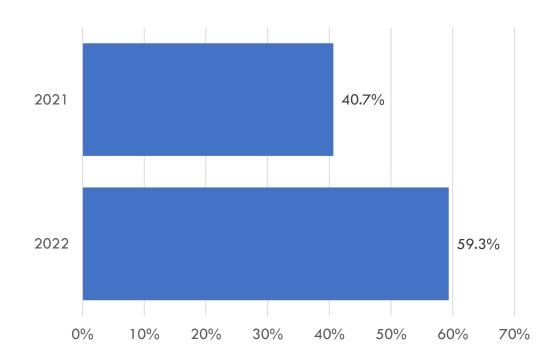
TOP-OF-MIND REASONS TO VISIT GREATER PALM SPRINGS







TIMING OF NEXT LIKELY TRIP TO GREATER PALM SPRINGS

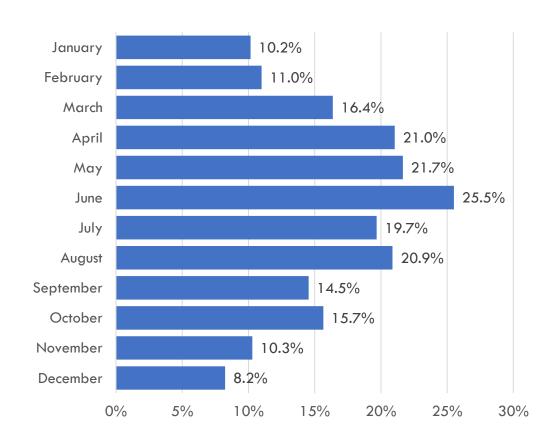


Q: When would you be MOST LIKELY to visit the Greater Palm Springs region for leisure? (Select one) Base: High Potential Visitor 2021/2022

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
2021	54.3%	34.0%	40.7%	49.6%	41.7%	41.6%	25.4%	29.8%
2022	45.7%	66.0%	59.3%	50.4%	58.3%	58.4%	74.6%	70.2%
Base	151	94	113	127	96	149	59	141



MONTH OF LIKELY TRIP TO GREATER PALM SPRINGS

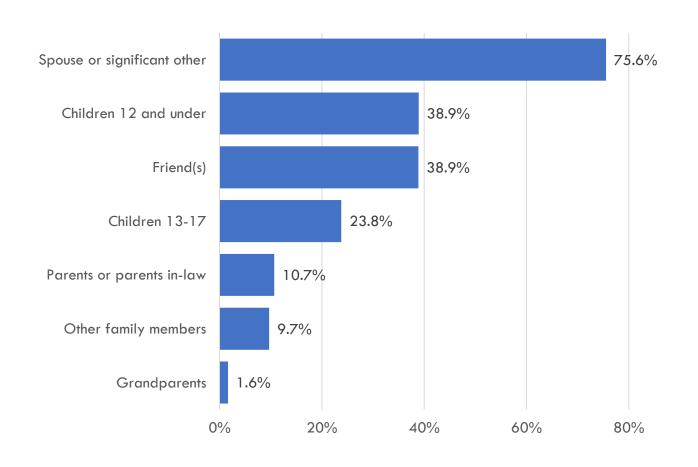


Q: In which month(s) would you most likely visit the Greater Palm Springs region? (Select all that apply) Base: High Potential Visitor 2021/2022

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
January	10.6%	12.8%	4.4%	4.7%	3.1%	5.4%	6.8%	14.2%
February	13.2%	16.0%	8.8%	11.0%	9.4%	7.4%	11.9%	9.9%
March	19.9%	19.1%	15.9%	11.8%	18.8%	17.4%	15.3%	13.5%
April	25.8%	29.8%	23.9%	15.0%	18.8%	18.1%	27.1%	17.7%
May	30.5%	17.0%	28.3%	19.7%	17.7%	14.8%	20.3%	19.1%
June	38.4%	22.3%	28.3%	23.6%	16.7%	16.8%	23.7%	21.3%
July	29.8%	20.2%	19.5%	16.5%	19.8%	18.1%	13.6%	13.5%
August	28.5%	18.1%	21.2%	17.3%	24.0%	22.1%	18.6%	15.6%
September	19.9%	20.2%	24.8%	25.2%	16.7%	8.1%	16.9%	7.8%
October	19.2%	19.1%	23.0%	32.3%	21.9%	7.4%	13.6%	9.9%
November	14.6%	14.9%	15.0%	19.7%	17.7%	10.1%	11.9%	2.1%
December	12.6%	8.5%	8.8%	11.8%	9.4%	8.1%	11.9%	3.5%
Base	151	94	113	127	96	149	59	141



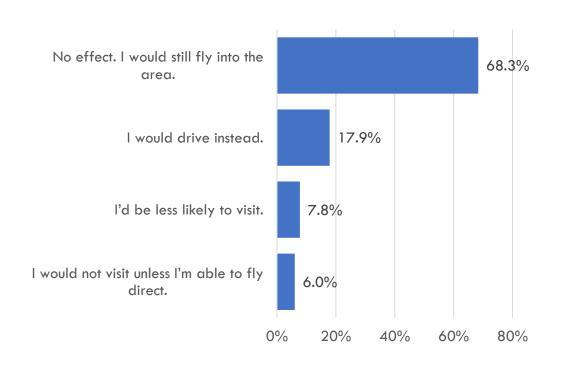
TRAVEL PARTY COMPOSITION



Q: Who would you take this trip to the Greater Palm Springs region with? (Select all that apply) Base: High Potential Visitor 2021/2022



EFFECT OF NO DIRECT FLIGHT ACCESS INTO GREATER PALM SPRINGS



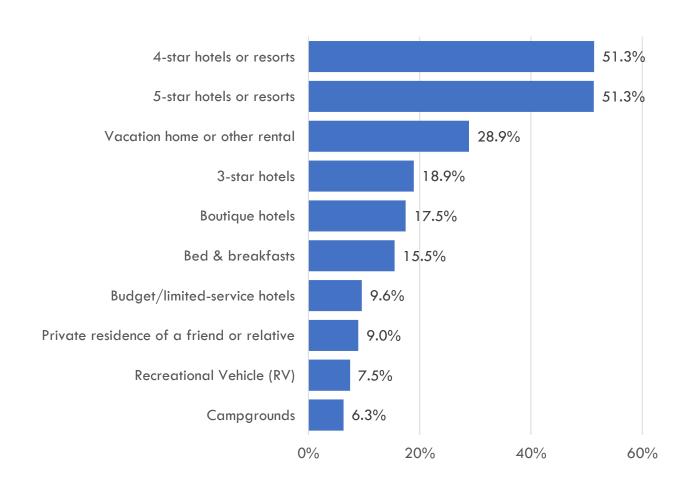
Q: If your flight to the Greater Palm Springs area had one stop (i.e. it was not a direct flight) how would this affect your likelihood of visiting? Base: High Potential Visitor 2021/2022

Detail by Market

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
No effect. I would still fly into the area.	63.2%	48.3%	77.8%	38.6%	68.5%	65.6%	80.5%	75.0%
I would drive instead.	26.3%	6.9%	16.7%	52.3%	18.5%	20.0%	9.8%	13.0%
I'd be less likely to visit.	5.3%	27.6%	0.0%	2.3%	11.1%	7.8%	7.3%	6.5%
I would not visit unless I'm able to fly direct.	5.3%	17.2%	5.6%	6.8%	1.9%	6.7%	2.4%	5.4%
Base	19	29	18	44	54	90	41	92



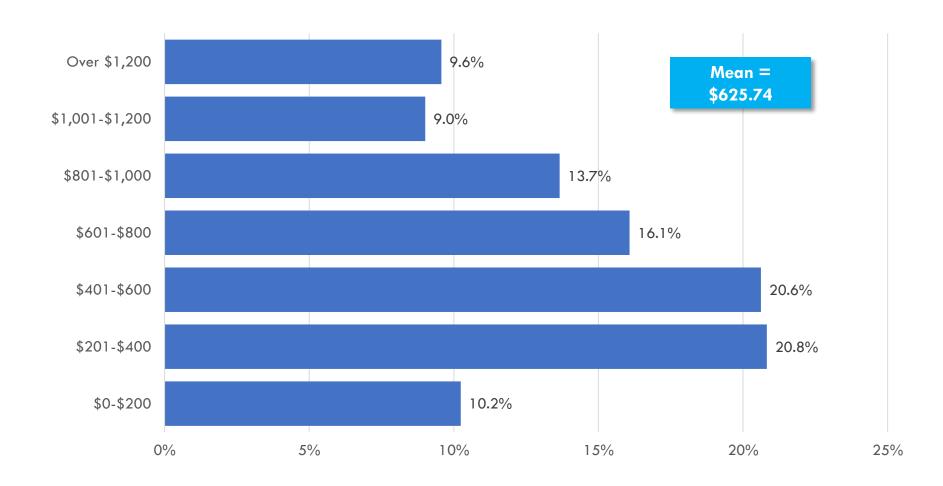
PREFERRED GREATER PALM SPRINGS LODGING



Q: Where would you most likely stay during this trip? (Select all that apply) Base: High Potential Visitor 2021/2022



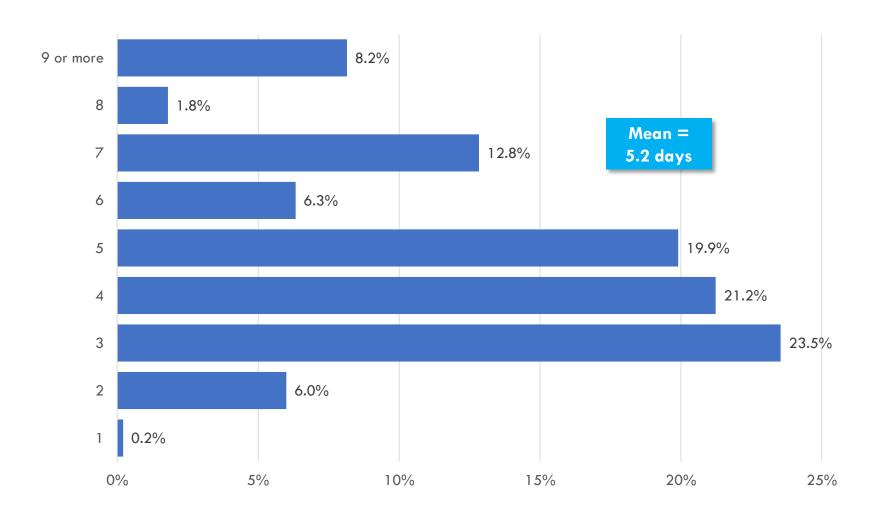
EXPECTED DAILY IN-MARKET SPENDING



Q: How much would you likely spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.) while in the Greater Palm Springs region? Base: High Potential Visitor 2021/2022



LENGTH OF GREATER PALM SPRINGS TRIP



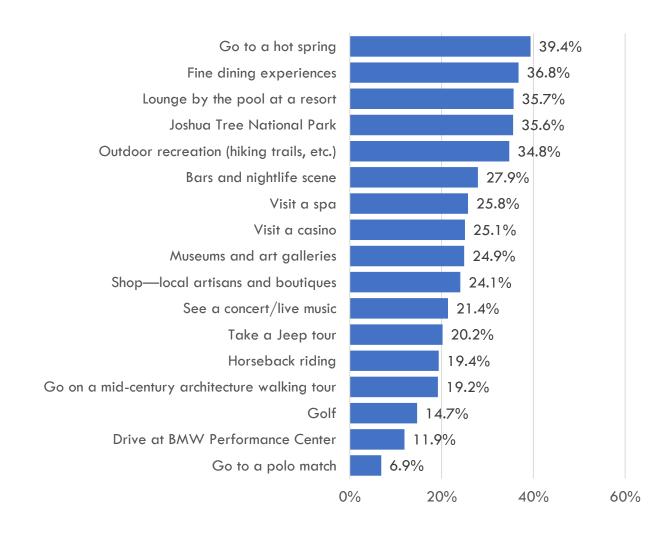
TOP 3 CITIES BY LENGTH OF STAY:

- NEW YORK
- DALLAS
- DENVER

Q: How many days would you spend in the Greater Palm Springs region? (Select one) Base: High Potential Visitor 2021/2022



GREATER PALM SPRINGS ACTIVITIES & EXPERIENCES DESIRED





DESIRED EMOTIONAL STATES

INTERESTED/INTRIGUED/CURIOUS

COMFORT ABLE/CONTENT/SATISFIED

ADVENTURE/ADVENTUROUS SERENE/TRANGUM/PEACEEM

GOOD/GREAT/EXCELLENT

REFRESHED/REJUVENATED/REVITALIZED

CALM/RELAXED/STRESS FREE AMAZED/ASTONISHMENT/AWESTRUCK

ENJOYMENT/HAPPY/LIKE IT/LOVE IT ENTHUSED/EXCITED/INVIGORATED

ENTERT AINED/ENTERT AINMENT/FUN
HOPEFUL/INSPIRED/MOTIVATED

/ELCOME/FRIENDLY/FEEL AT HOME



Q: Please continue to think about this trip to Greater Palm Springs. If this were the perfect trip, how would you like to feel throughout your stay in the area? Base: High Potential Visitor 2021/2022



GREATER PALM SPRINGS TRAVEL PLANNING WINDOW

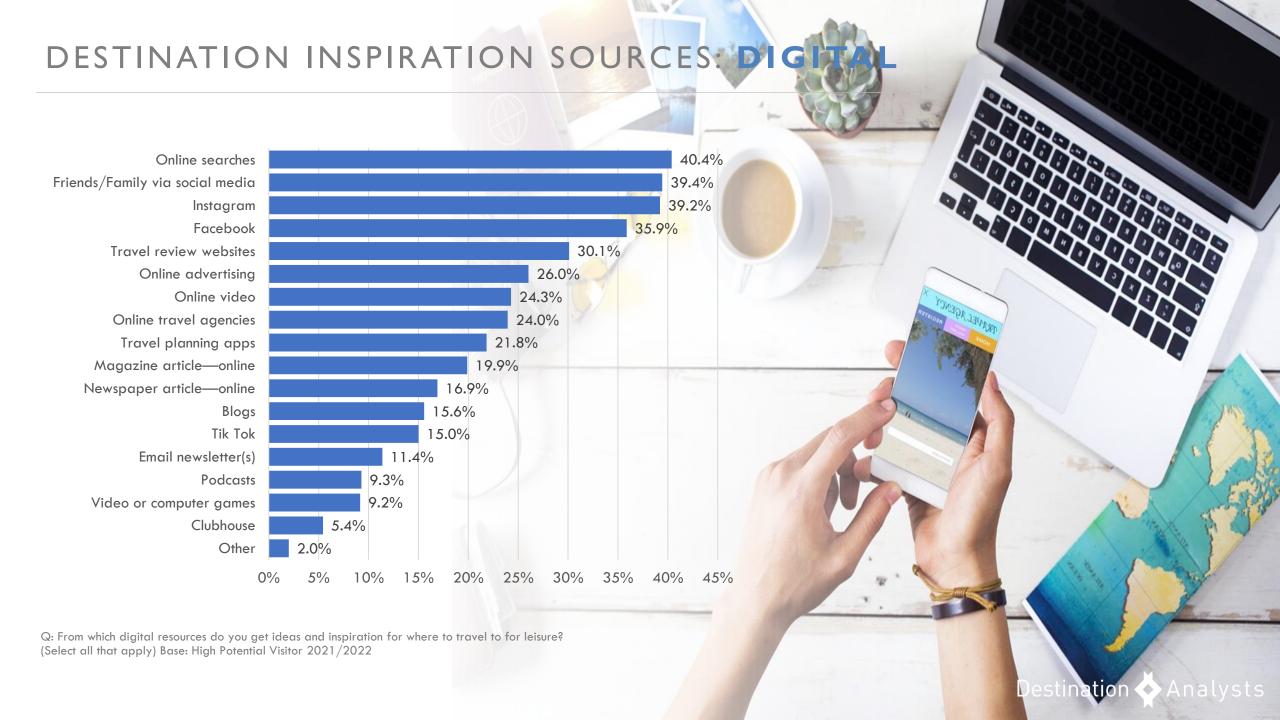


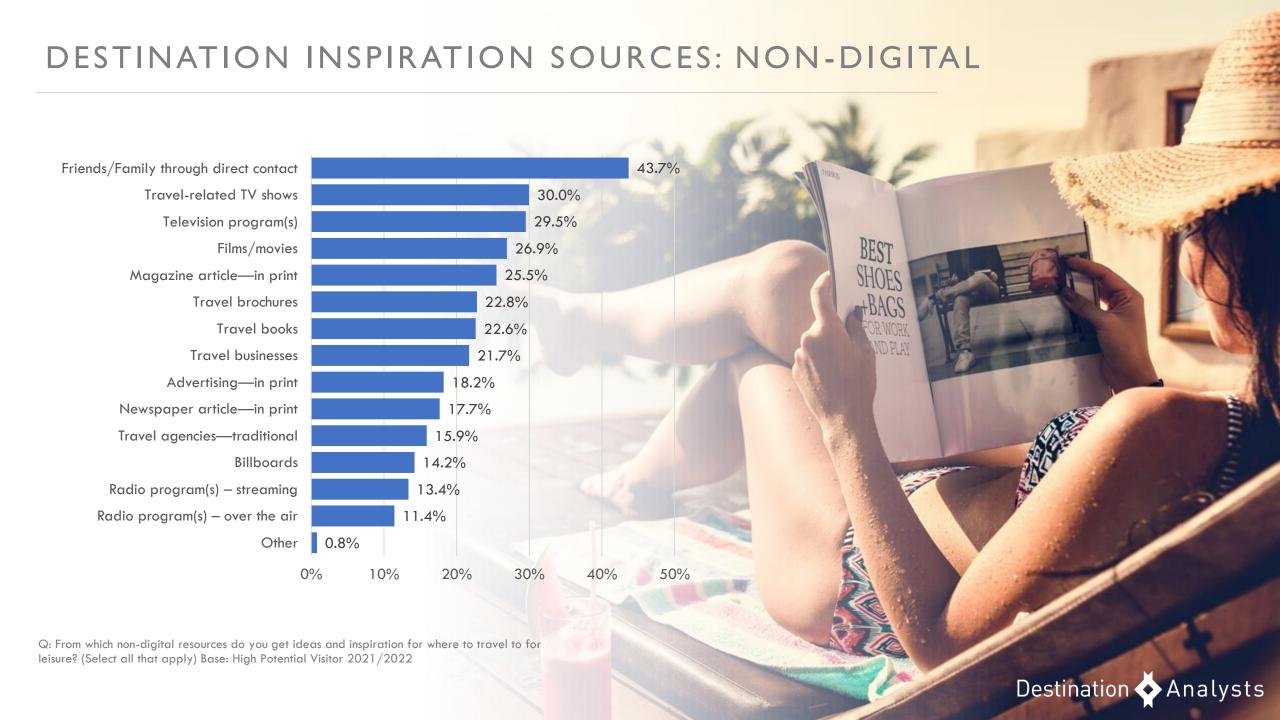
Q: How far in advance would you begin planning for a leisure trip to the Greater Palm Springs region? (Select one) Base: High Potential Visitor 2021/2022

Detail by Market

	Los Angeles	San Francisco	Las Vegas	Phoenix	Denver	Dallas	St Louis	New York
24 months or more	1.3%	1.1%	0.9%	1.6%	1.0%	2.0%	1.7%	2.1%
18 - 24 months	0.7%	0.0%	0.9%	3.1%	2.1%	3.4%	1.7%	0.7%
12 – 18 months	4.6%	4.3%	1.8%	9.4%	3.1%	8.1%	8.5%	6.4%
6 – 12 months	13.2%	22.3%	16.8%	20.5%	24.0%	27.5%	35.6%	34.8%
3 – 6 months	35.8%	45.7%	41.6%	30.7%	42.7%	36.2%	37.3%	39.0%
0 – 3 months	44.4%	26.6%	38.1%	34.6%	27.1%	22.8%	15.3%	17.0%
Mean	4.6	5.4	4.6	6.2	5.6	6.8	<i>7</i> .1	6.8
Base	151	94	113	127	96	149	59	141









DASHBOARD AND GEOLOCATION DATA ANALYSIS OF THE GREATER PALM SPRINGS REGION VISITORS—RESEARCH OBJECTIVES

This research program will be designed so that the Greater Palm Springs CVB will receive custom insights related to:

- How visitors experience the destination, including points of interest visited, regions, attractions, hotels, etc.
- The timeframe of visit
- Length of visit
- Residence/point of origin





GEO-LOCATION DATA ANALYSIS

Analyzed and displayed in dashboards by segments to examine:

- Differences in visitors by time of day, day of week, month and/or season
- Differences in guests by hotel or other accommodation types
- Differences in visitors by arrival to destination (i.e. airport vs highway)
- Differences in visitors to municipalities
- Differences in visitors to various attractions types
- Differences in visitors by geographic market
- Markets that align with tourism strategy, including profiles and geographic markets that have the longest overnight stays and engage in more activity during their trip







CVB BOARD OF DIRECTORS UPDATE

- > Resolution No. BOD 2021-001: Updated Board of Directors Bylaws
- ➤ Proposed 2021-2022 Budget

APPROVAL OF MINUTES

(JPA and CVB Board Vote)

> JPA-CVB Board of Directors Joint Meeting Minutes

CONSENT CALENDAR

(JPA Executive Committee Only Votes)

Warrants & Demands Dated March 2021 & April 2021

JPA EXECUTIVE COMMITTEE ITEMS

(JPA Executive Committee Only Votes)

- Resolution No. JPA 2021-003: Updated JPA Bylaws
- Proposed 2021-2022 Budget

CEO/PRESIDENT'S REPORT CVB UPDATES





HOST VENUE

JW MARRIOTT DESERT SPRINGS PALM DESERT TITLE SPONSOR

RECEPTION SPONSOR





HOLE SPONSORS





















HECKLER ARENA SPONSORS





RAFFLE/LIVE AUCTION & PRODUCT DONORS





















































112 **PLAYERS**

OVER \$30,000 Raised

2020 ECONOMIC IMPACT GREATER PALM SPRINGS

ECONOMIC IMPACT

2019 2020

\$7.5 BILLION	Economic Impact	\$3.6 BILLION (-52%)
53,572 JOBS	LIONS)	33,355 JOBS (-38%)
14.1 MILLION VISITORS	Visitors	8.6 MILLION (-39%)
7.7 MILLION DAY VISITORS	283	5.0 MILLON DAY VISITORS (-35%)
6.4 MILLION OVERNIGHT VISITORS		3.6 MILLON OVERNIGHT VISITORS (-44%)

COACHELLA VALLEY ARENA ECONOMIC IMPACT



1,572

NEW JOBS

\$42M

ADDITIONAL INCOME LOCAL WORKERS

\$141M

ECONOMIC IMPACT

\$11M

STATE & LOCAL TAXES

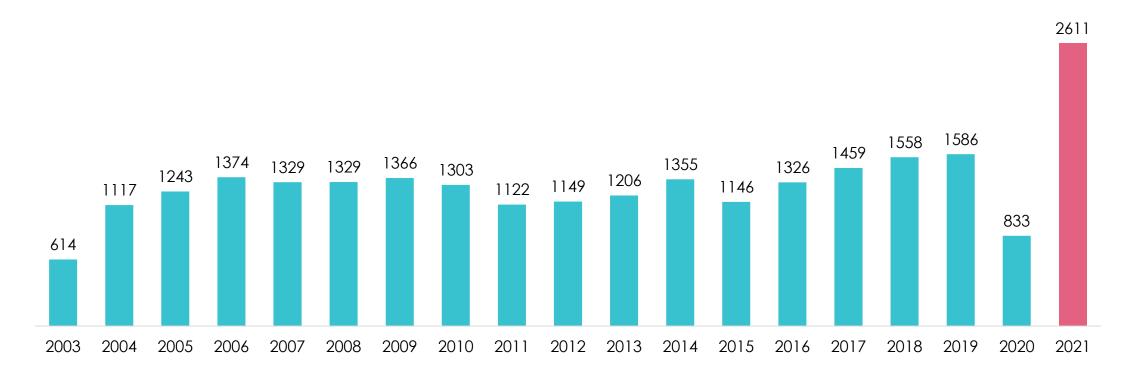


SUMMER AIR SERVICE

This upcoming summer PSP will see a record number of seats in the market

PSP SUMMER DAILY SEAT CAPACITY TRENDS

May to September 2003 to May to September 2021¹





SUMMER 2021 OVERVIEW



























PALM SPRINGS LIFE

2021 SUMMER CAMPAIGN

1B+ impressions

> 250K+ spots









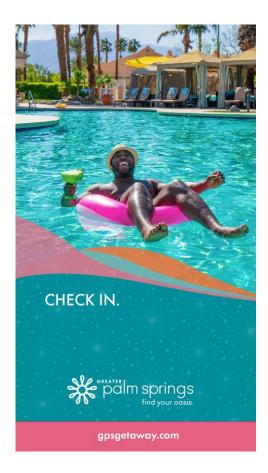


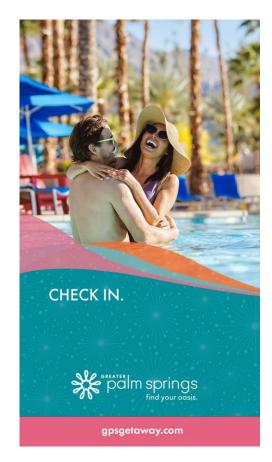
DESERT HILLS OUTLETS



- NEW for 2021: Outdoor digital panels across 10 high-traffic locations targeting shoppers at the Desert Hills Premium Outlets.
- Ads will feature summer getaway messaging as well as restaurant-focused messaging promoting the Summer Eats Pass.







SUMMER

2021

CO-OP

PARTNERS

870M+ impressions
23K+ spots















rancho las palmas palm springs







SUMMER RESTAURANT PASS - BANDWANGO

June - August

- Custom mobile pass that allows users to access restaurant deals and discounts.
- Restaurant check-ins enter diners into a weekly drawing to win prizes.

Marketing Campaign Includes:

- Out-of-Home
- Digital banner ads
- Digital / local radio spots
- Digital editorial content
- The Desert Sun











"The whole series was fantastic – thank you for the experience and education!"

Stacy Weber, Moss Adams Seattle, WA

"Thank you all - this was terrific and informative!"

Andrea Koronovich, Pipeline Communications Toronto, ON





"The Virtual FAM was so informative and engaging! I love all of the details and great oversight on the destination and hotels."

Lisa Dreier, Creative Group Appleton, WI

"Love the area even more after today!"

Lori Smith, CASBO

Lori Smith, CASBO Sacramento, CA



CONVENTION SALES - CAMPAIGN



















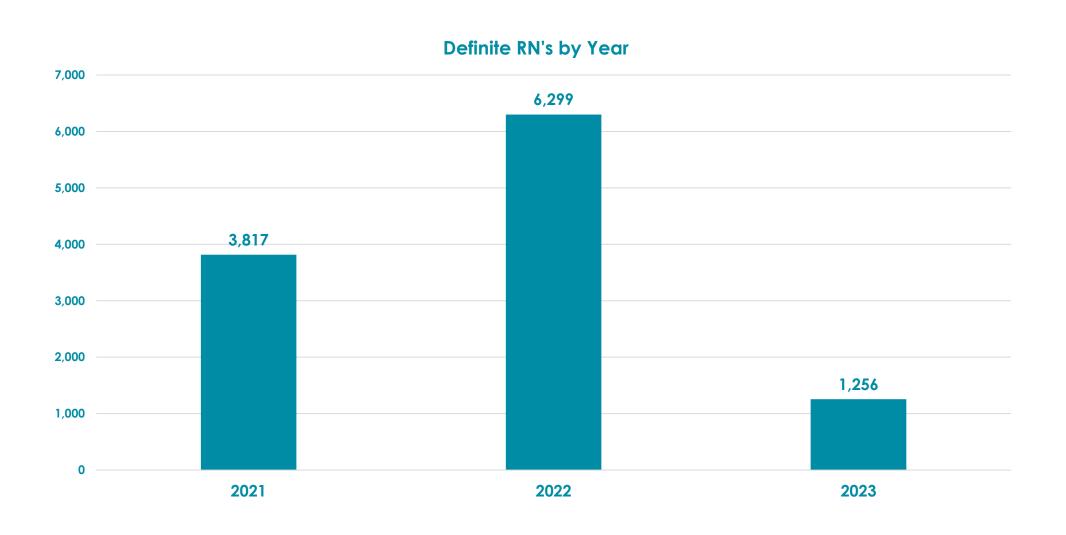




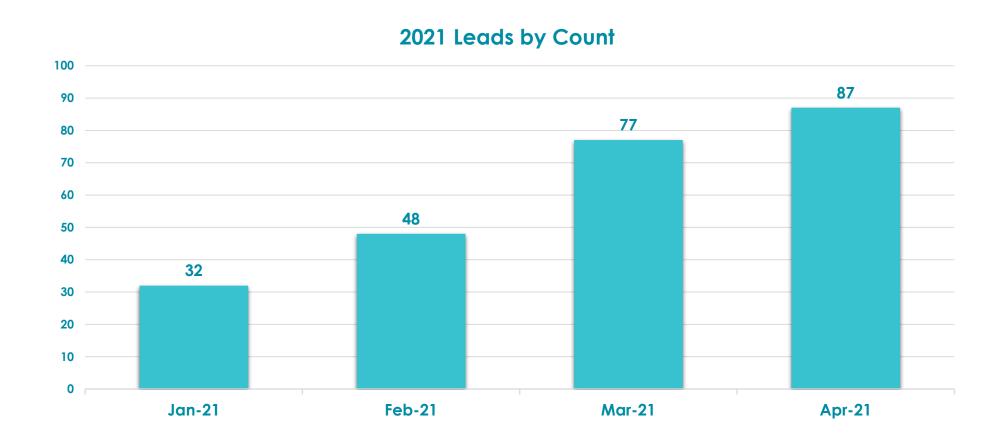




2021 BOOKINGS BY YEAR



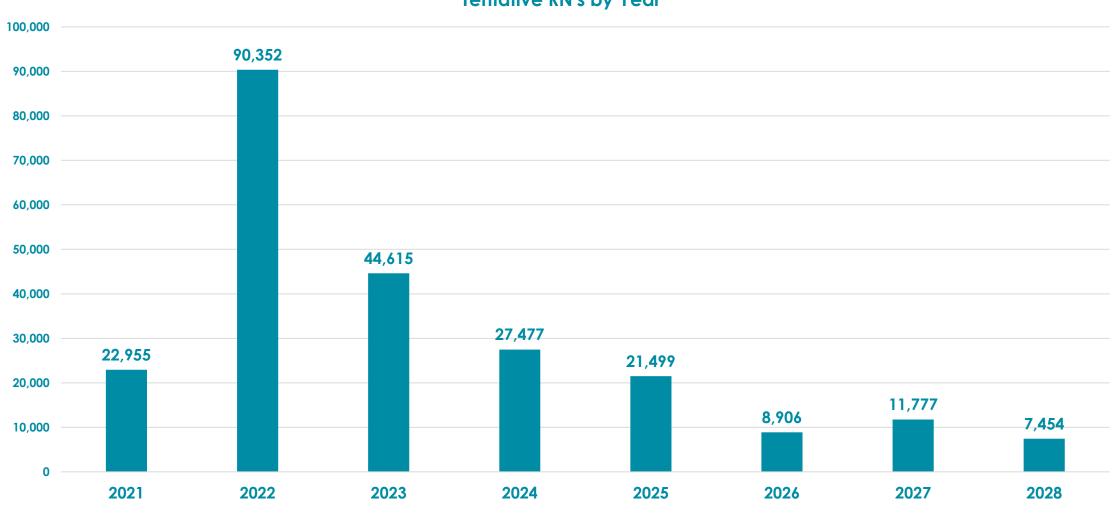
2021 LEADS YTD



BY SEGMENT: 51% Corporate • 30% Association • 18% SMERF • 1% Government

2021 LEADS YTD





HAPPY BIRTHDAY \$\$\$



CHARLES TOWNSEND

May 7th



JAY CHESTERTON

May 9th



TODD HOOKS

May 9th



ROLF HOEHN

May 11th



BRAD PONCHER

May 15th



JERRY KELLER

May 23rd



TOM TABLER

May 26th

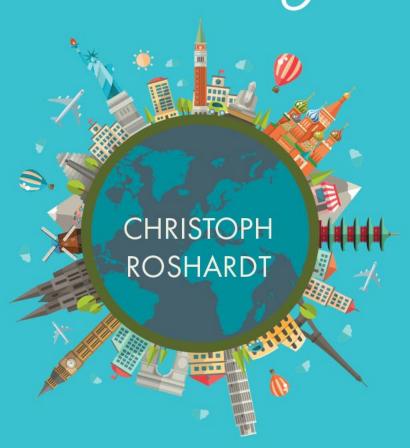


ROB HAMPTON

May 31st



Congratulations





BEST WISHES FROM ALL OF US, CHRISTOPH AND BRAD!



JPA Executive Committee & CVB Board of Directors Updates

Roundtable Updates

NEXT BOARD MEETING Friday, June 25, 2021



THE RITZ-CARLTON

RANCHO MIRAGE