

VISITOR INTERCEPT STUDY

palm springs | desert hot springs | cathedral city | rancho mirage |
palm desert | indian wells | la quinta | indio | coachella





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OVERVIEW

Tourism is the number one industry of Greater Palm Springs (GPS), producing major economic impact for all nine cities of the destination. It is vital that we understand our visitor in every way possible. To get a deeper understanding of our visitor—from whom they are and what they think about existing attributes to where they stay and spend money—the Greater Palm Springs Convention & Visitors Bureau (CVB), the tourism marketing organization for the region, decided to undertake a thorough study focused on our destination's visitor.

In October 2014, the CVB launched a 12-month Visitor Profile and Perceptions Study, contracting with Custom Intercept Solutions of Minneapolis, MN, to implement daily visitor profile surveys from Q4 2014 through Q3 2015. The surveys took place in all nine cities of the destination, including Palm Springs, Desert Hot Springs, Cathedral City, Rancho Mirage, Palm Desert, Indian Wells, La Quinta, Indio and Coachella.

The study involved reaching out directly to visitors and asking them targeted questions. A survey staff was trained to manage more than two dozen high visitor (non-hotel) traffic locales, as well as selected events throughout the valley, speaking with visitors one on one and asking them to take an online survey. Knowing that hotels/resorts are also valuable sources of visitor profile information, several key hotel Partners participated in the survey, gathering the targeted information from hotel guests. The study provided a strong base for building the visitor profile with more than 3,800 responses in Q4, more than 3,000 responses in both Q1 and Q2 and nearly 1,500 in Q3. In total, more than 12,000 surveys were completed in the study.

The Visitor Profile and Perceptions Study was conducted to satisfy several objectives that would be beneficial to both the CVB and its Partners as an important resource for sales and marketing planning, as well as attracting new and increased visitation. The objectives include:

1. Visitor by Accommodation
2. Visitor by Origin
3. Visitor by City
4. Visitor by Quarter

KEY OVERALL FINDINGS

- Q2 and Q3 visitors are more likely to stay in a hotel or resort (40% and 37%, respectively), while Q2 and Q4 visitors are least likely to rent a vacation home (12% in both quarters).
- Ninety percent of all visitors surveyed have annual incomes of more than \$60,000.
- Seventy-five percent of all visitors surveyed have a college degree.
- Seventy-five percent of all visitors surveyed are married.
- Across all four quarters, half of all visitors booked their trip to GPS online.
- In Q2 and Q3, half book at least one month prior, while in Q1 and Q4, two-thirds book at least one month prior.
- In Q3 and Q4, 40% planned to stay in GPS for at least a week (75% for Canadians), while in Q1 this percentage increased to 50%. Week-long visits are lowest in Q2, at 25%. Visitors to Greater Palm Springs are generally very pleased with their experience. Ninety-five percent rate the overall destination satisfaction as “very good” or “excellent” over the four quarters, and highest in Q2 at an incredible high of 99%.
- At least half of all visitors to Greater Palm Springs drove in their personal vehicles.
- In Q1 and Q2, over 60% of visitors who flew to GPS did so via Palm Springs International Airport. In Q3, 41% arrived via Los Angeles International Airport.

The background of the entire page is a photograph of a resort pool area. In the foreground, there's a long, narrow pool with a fountain in the center. On either side of the pool are lounge chairs and palm trees. In the background, there's a building with large windows and more palm trees. The entire image has a teal/cyan color overlay.

VISITOR BY ACCOMMODATION

This portion of the study focused on the visitor by accommodation, granting an in-depth visitor profile that focused on where the visitor stayed:

- in a hotel/resort
- in a vacation rental
- in a timeshare
- in a second home

Information analyzed for each of these types of stays included:

- Purpose of stay: business or leisure
- Frequency of visits
- Method of travel: car, plane and other
- Size of party
- Money spent
- Attractions visited
- Experience ratings: lodging, attractions, service and overall
- Visitor demographics: employment/education; marital status; age and household income
- Money spent
- Attractions visited



OVERALL HIGHLIGHTS

- Accommodations vary significantly by quarter.
- In Q3, hotel/resorts increase to 40%; vacation home rentals increase significantly over Q2 (to 18%).
- Single rooms are the most likely to rent, especially in Q3.

HOTELS/RESORTS:

- Across all four quarters, trips with hotel/resort stays are most often for leisure, with Q3 being most likely to travel for leisure.
- Across all four quarters, hotel/resort guests are generally married; Q3 sees a significantly higher rate of domestic partnerships.
- Q1 and Q4 hotel/resort guests are most likely to be retired, while Q3 guests are most likely to have an occupation in marketing, sales or other office work.
- On average, across all four quarters, hotel/resort guests spend \$147 per day on dining, \$45 per day on local transportation, \$101 per day on recreation and entertainment and \$160 per day on retail shopping.

VACATION HOME RENTALS:

- Similar to hotel/resort guests, most travelers staying in vacation rental homes book via the Internet (73% across all four quarters).
- Across all four quarters, vacation home renters are most often traveling for leisure, with Q1 being most likely to travel for leisure (97%).
- In Q1, Q3 and Q4, vacation home renters are generally 55+ years old (79%, 63%, and 66% respectively), however, in Q2 nearly half of renters (46%) are 35-54 years old.
- Similar to hotel/resort guests, vacation home renters are generally married; Q3 sees a significantly higher rate of domestic partnerships (23%).
- Vacation home renters are spending less than hotel/resort guests in all categories; on average, across all four quarters, vacation home renters are spending \$84 per day on dining out, \$20 per day on local transportation, \$51 per day on recreation and entertainment and \$57 per day on retail shopping.



TIMESHARES:

- Most timeshares are booked via the Internet. Those booking timeshares in Q3 are significantly more likely to book via the Internet.
- Generally, timeshares are booked more than one month ahead. Q1 visitors are significantly more likely to book their timeshare more than one month ahead, while Q2 and Q3 travelers are more likely to book 3-4 weeks ahead.
- Overall, visitors staying in timeshares are there for 7 or 8+ nights. Q1 visitors are significantly most likely to stay 8+ nights, while Q2, Q3 and Q4 are significantly more likely to stay 5 nights.
- Across all four quarters, timeshare visitors most often travel for leisure. Q3 visitors are significantly more likely to say they are traveling for business, but not for conferences or conventions.
- Ages of those booking timeshares vary by quarter; just under half of Q1 and Q4 travelers are 65+ years old, while just over half of Q2 and Q3 travelers are 45-64 years old. Q2 and Q3 timeshare visitors booking are significantly most likely to be 35-44 years old and 45-54 years old.
- Similar to hotel/resort guests and vacation home renters, when asked about income, about one in four who booked timeshares preferred not to answer. Q2 respondents were most likely report incomes of \$60K - \$79.9K.
- Again, following hotel/resort guests and vacation home renters, those who book timeshares are generally married.
- Half (50%) of Q1 and two-fifths of Q4 timeshare visitors are retired, while only one in four in Q2 and one in five in Q3 are retired. More than a third of those booking timeshares in Q2 and Q3 have occupations as management, business, professional or related occupations.

SECOND HOMES:

- Second homes account for 12% of visitors to GPS overall.
- Second home visitors are most likely to be frequent visitors to GPS, with 44% having made 8 or more trips in the past three years. These visitors frequently fly into Palm Springs International Airport (87%) and use a personal car while visiting (78%).
- Canadian visitors are significantly more likely to use second



homes or rent vacation homes.

- Second home visitors are more likely to be a couple (two-person travel party) (70%) and are more likely to take a golf/hiking/recreation trip (14%).
- Second home visitors are more likely to be somewhat or very likely to recommend GPS to friends and family (100%), and to have had somewhat or very positive perception of GPS (100%).
- Second home visitors spend a daily average of \$140 on dining, \$14 on transportation, \$44 on recreation/entertainment, and \$88 on retail shopping.

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Accommodation-type

Number of Survey Responses

Annual Average

12,069

Hotel

3,419

Vacation Rental

1,796

Timeshare

1,494

2nd Home

1,340

DEMOGRAPHICS

RESIDENCY REGION

In which region do you reside?

| | | | | | |
|---------------|-----|-----|-----|-----|-----|
| International | 8% | 12% | 11% | 4% | 2% |
| Canada | 20% | 12% | 38% | 14% | 40% |
| CA | 38% | 46% | 14% | 34% | 25% |
| Other US | 34% | 30% | 37% | 47% | 34% |

RESIDENCY COUNTRY

In which country do you reside?

| | | | | | |
|-----------------------|-----|-----|-----|-----|-----|
| Canada | 71% | 51% | 78% | 77% | 95% |
| United Kingdom | 8% | 15% | 7% | 6% | 2% |
| Germany | 3% | 6% | 2% | 2% | 1% |
| Australia/New Zealand | 3% | 6% | 2% | 2% | 0% |
| Mexico | 3% | 2% | 1% | 4% | 0% |
| China | 3% | 4% | 4% | 1% | 0% |
| France | 2% | 4% | 1% | 2% | 0% |
| Japan | 1% | 2% | 1% | 1% | 0% |
| South America | 1% | 1% | 1% | 0% | 0% |
| Other | 5% | 10% | 3% | 4% | 1% |

RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | | | |
|--------------|-----|-----|-----|-----|-----|
| California | 52% | 61% | 28% | 42% | 42% |
| Washington | 8% | 5% | 12% | 6% | 17% |
| Oregon | 3% | 2% | 6% | 3% | 8% |
| Illinois | 3% | 2% | 5% | 4% | 4% |
| Arizona | 3% | 4% | 2% | 4% | 1% |
| Minnesota | 3% | 1% | 6% | 4% | 2% |
| Colorado | 2% | 2% | 4% | 3% | 3% |
| Nevada | 2% | 2% | 2% | 3% | 2% |
| New York | 2% | 2% | 4% | 2% | 2% |
| Texas | 2% | 2% | 2% | 2% | 0% |
| Michigan | 1% | 1% | 2% | 1% | 1% |
| Florida | 1% | 1% | 2% | 2% | 0% |
| Pennsylvania | 1% | 1% | 2% | 2% | 1% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Accommodation-type

Annual Average

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | Hotel | Vacation Rental | Timeshare | 2nd Home |
|----------------------|----|-------|-----------------|-----------|----------|
| Wisconsin | 1% | 1% | 2% | 1% | 2% |
| Arkansas | 1% | 1% | 1% | 1% | 1% |
| New Jersey | 1% | 1% | 2% | 1% | 1% |
| Ohio | 1% | 1% | 1% | 2% | 1% |
| Utah | 1% | 1% | 1% | 2% | 1% |
| Virginia | 1% | 1% | 1% | 1% | |
| Massachusetts | 1% | 1% | 1% | 1% | |
| Idaho | 1% | 1% | 1% | 1% | 1% |
| Iowa | 1% | | 1% | 1% | 1% |
| New Mexico | 1% | 1% | 1% | 1% | |
| Tennessee | 1% | | 1% | 2% | |
| Georgia | 1% | 1% | | 1% | |
| Connecticut | | | 1% | 1% | 1% |
| Missouri | | | 1% | 1% | 1% |
| Maryland | | | 1% | | |
| Oklahoma | | | | 1% | |
| Alaska | | | 1% | | 1% |
| North Carolina | | | | | |
| Montana | | | 1% | | 1% |
| Kansas | | | 1% | | 1% |
| South Dakota | | | 1% | | |
| Indiana | | | | | 1% |
| District of Columbia | | 1% | | | |
| Nebraska | | | 1% | | |
| South Carolina | | | | | |
| Kentucky | | | | | |
| North Dakota | | | | 1% | |
| Maine | | | | | |
| Louisiana | | | | | |
| Alabama | | | | | |
| Hawaii | | | | | |
| Mississippi | | | | | |
| New Hampshire | | | | | |
| Wyoming | | | | | |
| Vermont | | | | | |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Accommodation-type

Annual Average

Hotel Vacation Rental Timeshare 2nd Home

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | | | |
|---------------|----|----|----|----|----|
| Delaware | 0% | 0% | 0% | 0% | 0% |
| Rhode Island | 0% | 0% | 0% | 0% | 0% |
| West Virginia | 0% | 0% | 0% | 0% | 0% |

AGE

Which of the following age categories includes your age?

| | | | | | |
|-------|-----|-----|-----|-----|-----|
| 18-34 | 15% | 16% | 6% | 6% | 3% |
| 35-44 | 15% | 20% | 10% | 12% | 5% |
| 45-54 | 18% | 23% | 16% | 19% | 13% |
| 55-64 | 27% | 24% | 34% | 29% | 35% |
| 65+ | 26% | 17% | 33% | 33% | 43% |

GENDER

What is your gender?

| | | | | | |
|--------|-----|-----|-----|-----|-----|
| Male | 52% | 53% | 55% | 52% | 51% |
| Female | 49% | 47% | 45% | 48% | 49% |

INCOME

Please include the category which best describes your household's approximate annual income.

| | | | | | |
|-------------------|-----|-----|-----|-----|-----|
| <60,000 | 18% | 6% | 12% | 11% | 11% |
| 60,000 - 79,999 | 22% | 20% | 19% | 24% | 18% |
| 80,000 - 99,999 | 14% | 14% | 16% | 19% | 13% |
| 100,000 - 159,999 | 29% | 31% | 39% | 33% | 30% |
| 160,000+ | 16% | 20% | 15% | 13% | 29% |

HOUSEHOLD SIZE

(adults only)

Including yourself, how many people live in your household who are over the age of 18?

| | | | | | |
|----|-----|-----|-----|-----|-----|
| 1 | 20% | 18% | 20% | 13% | 50% |
| 2 | 59% | 59% | 67% | 60% | 50% |
| 3 | 10% | 11% | 0% | 20% | 0% |
| 4+ | 11% | 12% | 13% | 7% | 0% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Accommodation-type

Annual Average

Hotel Vacation Rental Timeshare 2nd Home

DEMOGRAPHICS

HOUSEHOLD SIZE (under 18)

Including yourself, how many people live in your household who are under the age of 18?

| | | | | | |
|----|-----|-----|-----|-----|------|
| 0 | 80% | 79% | 80% | 87% | 100% |
| 1 | 10% | 10% | 0% | 13% | 0% |
| 2 | 7% | 7% | 7% | 0% | 0% |
| 3+ | 4% | 4% | 13% | 0% | 0% |

EDUCATION

What is your highest level of education?

| | | | | | |
|-----------------------|-----|-----|-----|-----|-----|
| Some high school | 1% | 0% | 1% | 0% | 1% |
| Completed high school | 7% | 5% | 4% | 3% | 7% |
| Some college | 19% | 17% | 13% | 16% | 17% |
| Associates degree | 5% | 5% | 4% | 5% | 4% |
| Bachelors degree | 38% | 41% | 41% | 42% | 36% |
| Graduate degree | 26% | 27% | 30% | 29% | 30% |

MARITAL STATUS

What is your marital status?

| | | | | | |
|----------------------|-----|-----|-----|-----|-----|
| Single | 13% | 16% | 7% | 5% | 6% |
| Married | 73% | 70% | 78% | 83% | 81% |
| Divorced | 4% | 3% | 3% | 3% | 2% |
| Domestic partnership | 5% | 7% | 6% | 5% | 4% |
| Widowed | 4% | 3% | 4% | 4% | 6% |

OCCUPATION

Which of the following best describes your occupation?

| | | | | | |
|---------------------------|-----|-----|-----|-----|-----|
| Retired | 31% | 20% | 41% | 36% | 50% |
| Mngment/Bus. Professional | 25% | 32% | 22% | 26% | 24% |
| Mkting/Sales/Office | 9% | 10% | 7% | 8% | 5% |
| Medical | 8% | 9% | 8% | 10% | 6% |
| Gov. Affairs | 5% | 6% | 5% | 5% | 3% |
| Const./Extraction/Maint. | 4% | 3% | 4% | 3% | 3% |

ETHNICITY

What is your ethnic background?

| | | | | | |
|------------------------|-----|-----|-----|-----|-----|
| Caucasian | 81% | 76% | 88% | 87% | 93% |
| Asian | 5% | 8% | 5% | 3% | 1% |
| Multi-racial | 4% | 4% | 4% | 3% | 2% |
| Hispanic/Latino | 5% | 6% | 2% | 3% | 1% |
| Black/African American | 2% | 2% | 1% | 2% | 0% |
| Other | 1% | 2% | 1% | 1% | 1% |

SURVEY QUESTIONS

BOOKING TRAVEL ARRANGEMENTS

BOOKING TRAVEL

How did you book your travel?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2nd Home |
|---|----------------|-------|-----------------|-----------|----------|
| Via the internet | 57.8% | 71.2% | 78.3% | 67.6% | 37.5% |
| Did not book travel (stayed w/friends/family) | 25.3% | 9.7% | 5.9% | 13.5% | 54.3% |
| Phoned provider directly | 6.8% | 10.6% | 5.6% | 13.8% | 2.1% |
| Used a travel agent | 3.9% | 6.0% | 5.6% | 2.7% | 1.9% |
| Friend/Spouse | 5.7% | 3.1% | 4.5% | 2.5% | 3.9% |
| Other | 0.3% | 0.0% | 0.0% | 0.1% | 0.0% |

WHEN TRAVEL BOOKED

How far in advance did you book your travel?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2nd Home |
|-------------------|----------------|-------|-----------------|-----------|----------|
| Decided day of | 6% | 3% | 1% | 2% | 5% |
| Less than 1 week | 10% | 12% | 2% | 3% | 7% |
| 1 - 2 weeks | 11% | 14% | 4% | 5% | 9% |
| 3 - 4 weeks | 13% | 18% | 8% | 13% | 6% |
| More than 1 month | 60% | 53% | 84% | 77% | 71% |

LENGTH OF STAY

How many nights are you staying in Greater Palm Springs during your visit?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2nd Home |
|--------------|----------------|-------|-----------------|-----------|----------|
| 1 - 2 nights | 14% | 31% | 2% | 5% | 4% |
| 3 - 4 nights | 18% | 32% | 8% | 12% | 9% |
| 5-6 nights | 9% | 12% | 5% | 16% | 4% |
| 7 nights | 13% | 12% | 10% | 33% | 4% |
| 8+ nights | 37% | 12% | 74% | 34% | 79% |

ACCOMMODATIONS

What type of accommodations are you staying in while in Greater Palm Springs?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2nd Home |
|----------------------|----------------|-------|-----------------|-----------|----------|
| Hotel/Resort | 31% | 100% | | | |
| Friends/Family | 20% | | | | |
| Vacation home rental | 16% | | 100% | | |
| Timeshare | 14% | | | 100% | |
| 2nd home | 12% | | | | 100% |
| RV Park | 4% | | | | |
| Other | 3% | | | | |

TRAVEL PARTY SIZE

Including yourself, how many people traveled in your immediate party with you on this trip to Greater Palm Springs?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2nd Home |
|----|----------------|-------|-----------------|-----------|----------|
| 1 | 13% | 12% | 8% | 7% | 13% |
| 2 | 58% | 60% | 61% | 66% | 70% |
| 3 | 10% | 10% | 8% | 9% | 6% |
| 4 | 12% | 11% | 14% | 12% | 8% |
| 5 | 4% | 3% | 5% | 3% | 3% |
| 6+ | 4% | 4% | 4% | 3% | 1% |

GPS

Annual Average

Greater Palm Springs Visitor by Accommodation-type

Hotel Vacation Rental Timeshare 2nd Home

SURVEY QUESTIONS

TRIP PURPOSE

TRAVEL PURPOSE

Is the primary purpose of your travel for business or leisure?

| | | | | | |
|-------------------------------------|-----|-----|-----|-----|-----|
| Leisure | 93% | 89% | 93% | 96% | 96% |
| Business - other | 4% | 5% | 5% | 3% | 3% |
| Business - convention or conference | 3% | 5% | 3% | 1% | 1% |

TYPE OF LEISURE TRAVEL-

Which of the following best describes your leisure trip?

| | | | | | |
|----------------------------|-----|-----|-----|-----|-----|
| General vacation | 43% | 37% | 66% | 59% | 57% |
| Quick leisure trip | 29% | 37% | 10% | 20% | 15% |
| Visiting friends/relatives | 10% | 4% | 4% | 4% | 2% |
| Golf/Hike/Recreation | 7% | 6% | 9% | 8% | 14% |
| Special Event/Festival | 5% | 7% | 5% | 4% | 2% |
| Romantic trip | 3% | 6% | 1% | 3% | 1% |
| Other | 3% | 1% | 2% | 1% | 7% |

FREQUENCY OF LEISURE TRAVEL

How many times have you been to Greater Palm Springs for leisure purposes in the last 3 years?

| | | | | | |
|--------------------|-----|-----|-----|-----|-----|
| First trip | 29% | 43% | 28% | 29% | 2% |
| 2 trips | 16% | 17% | 19% | 20% | 3% |
| 3 - 4 trips | 28% | 21% | 33% | 30% | 37% |
| 5 - 7 trips | 9% | 7% | 8% | 9% | 12% |
| 8+ trips | 17% | 10% | 11% | 11% | 44% |
| Business trip only | 1% | 2% | 1% | 0% | 0% |

TRANSPORTATION

TRANSPORTATION TO GPS

What was your primary method of travel to Greater Palm Springs?

| | | | | | |
|-------------------------|-----|-----|-----|-----|-----|
| Personal vehicle | 53% | 55% | 41% | 49% | 56% |
| Air | 42% | 43% | 58% | 51% | 43% |
| RV | 3% | 0% | 0% | 0% | 1% |
| Charter bus/motor coach | 1% | 1% | 0% | 0% | 0% |
| Train | 0% | 0% | 1% | 0% | 0% |
| Scheduled bus | 0% | 0% | 0% | 0% | 0% |
| Other | 0% | 0% | 0% | 0% | 0% |

What airport did you fly into?

| | | | | | |
|--------------|-----|-----|-----|-----|-----|
| Palm Springs | 60% | 50% | 61% | 59% | 87% |
| Los Angeles | 23% | 29% | 27% | 20% | 9% |
| Ontario | 8% | 7% | 6% | 10% | 3% |
| San Diego | 4% | 6% | 4% | 5% | 1% |
| Santa Ana | 1% | 1% | 1% | 1% | 0% |

GPS

Annual Average

Greater Palm Springs Visitor by Accommodation-type

Hotel Vacation Rental Timeshare 2nd Home

SURVEY QUESTIONS

cont. TRIP PURPOSE

TRANSPORTATION IN GPS

What was your primary means of transportation while in GPS?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|--------------|----------------|-------|-----------------|-----------|----------------------|
| Personal car | 57% | 53% | 58% | 38% | 78% |
| Rental car | 37% | 36% | 41% | 58% | 20% |
| Walk | 3% | 6% | 0% | 2% | 0% |
| Taxi | 1% | 2% | 0% | 0% | 0% |
| Other | 3% | 3% | 1% | 2% | 3% |

DESTINATION EXPERIENCE

ASPECTS OF TRIP

Percent of people who rated aspects their trip excellent or very good.

| | | | | | |
|-------------------------------------|-----|-----|-----|-----|------|
| Satisfaction of your accommodations | 87% | 87% | 84% | 89% | 95% |
| Service provided by accommodations | 86% | 90% | 73% | 91% | 88% |
| Quality of service received | 91% | 91% | 84% | 94% | 95% |
| Overall destination value | 91% | 91% | 84% | 91% | 95% |
| Overall destination satisfaction | 94% | 95% | 93% | 95% | 100% |

DESTINATION FEATURES

Percent of people who rated destination features excellent or very good.

| | | | | | |
|---|-----|-----|-----|-----|-----|
| Accommodations | 93% | 89% | 94% | 95% | 99% |
| Spas | 93% | 93% | 93% | 93% | 95% |
| Shopping | 92% | 92% | 92% | 92% | 93% |
| Live entertainment | 86% | 84% | 84% | 85% | 89% |
| Museums | 95% | 95% | 94% | 97% | 95% |
| Dining | 95% | 94% | 93% | 95% | 96% |
| Nightlife | 85% | 87% | 84% | 81% | 83% |
| Recreation sports facilities (golf, tennis) | 97% | 98% | 97% | 97% | 98% |
| Outdoor recreation (hiking, jeep tours) | 97% | 97% | 96% | 97% | 97% |
| PS Aerial Tramway | 96% | 97% | 96% | 98% | 93% |
| National parks/Monuments | 95% | 94% | 94% | 94% | 93% |
| Golf courses | 98% | 98% | 99% | 98% | 99% |
| Tennis facilities | 96% | 93% | 97% | 97% | 98% |
| Cycling | 88% | 87% | 86% | 90% | 88% |
| Hiking | 95% | 94% | 97% | 95% | 95% |
| Casinos | 93% | 93% | 94% | 95% | 86% |
| The Living Desert | 96% | 95% | 95% | 96% | 97% |

GPS

Annual Average

Greater Palm Springs Visitor by Accommodation-type

Hotel Vacation Rental Timeshare 2nd Home

SURVEY QUESTIONS

DESTINATION EXPERIENCE

RETURNING TO GREATER PALM SPRINGS

Are you planning on returning to Greater Palm Springs for leisure purposes?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|----------------|----------------|-------|-----------------|-----------|----------------------|
| Definitely | 68% | 64% | 64% | 69% | 93% |
| Likely | 21% | 24% | 24% | 23% | 5% |
| Possible | 9% | 11% | 9% | 8% | 3% |
| Unlikely | 1% | 1% | 1% | 0% | 0% |
| Definitely not | 1% | 1% | 1% | 0% | 0% |

ACTUAL VERSUS ANTICIPATED EXPERIENCE

Please rate your actual experience in Greater Palm Springs compared to what you anticipated your experience would be.

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|--------------------|----------------|-------|-----------------|-----------|----------------------|
| Much better | 30% | 31% | 26% | 23% | 43% |
| Somewhat better | 29% | 28% | 32% | 32% | 23% |
| Equals Anticipated | 38% | 37% | 36% | 43% | 35% |
| Somewhat worse | 3% | 3% | 5% | 0% | 0% |
| Much worse | 1% | 1% | 0% | 2% | 0% |

RECOMMENDATIONS TO FAMILY AND FRIENDS

How likely would you be to recommend visiting Greater Palm Springs to family, friends or associates?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|----------------------------|----------------|-------|-----------------|-----------|----------------------|
| Very unlikely | 3% | 2% | 4% | 8% | 0% |
| Somewhat unlikely | 1% | 2% | 1% | 0% | 0% |
| Neither likely or unlikely | 2% | 2% | 3% | 3% | 0% |
| Somewhat likely | 17% | 20% | 16% | 14% | 3% |
| Very likely | 77% | 75% | 76% | 75% | 98% |

PERCEPTION OF DESTINATION-

Based on your experience in Greater Palm Springs during this visit, what was your overall perception of the destination?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|-------------------|----------------|-------|-----------------|-----------|----------------------|
| Very positive | 85% | 83% | 86% | 82% | 95% |
| Somewhat positive | 13% | 14% | 11% | 17% | 5% |
| Neutral | 2% | 1% | 3% | 2% | 0% |
| Somewhat negative | 1% | 1% | 0% | 0% | 0% |
| Very negative | 1% | 1% | 0% | 0% | 0% |

GPS

Greater Palm Springs Visitor by Accommodation-type

Annual Average

Hotel Vacation Rental Timeshare 2nd Home

SURVEY QUESTIONS

DESTINATION EXPERIENCE

EXPENSES

Which of the following categories did your personal travel party incur expenses while in the destination?

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|------------------------------|----------------|-------|-----------------|-----------|----------------------|
| Dining out | 95% | 93% | 97% | 98% | 98% |
| Retail shopping | 77% | 69% | 88% | 85% | 80% |
| Recreation and entertainment | 72% | 61% | 86% | 88% | 68% |
| Other | 51% | 50% | 60% | 52% | 45% |
| Local transportation | 44% | 41% | 59% | 55% | 33% |
| None of the above | 2% | 4% | 0% | 2% | 3% |

DAILY SPENDING

Please indicate your personal travel party's average daily spend while in Greater Palm Springs during your trip.

| | Annual Average | Hotel | Vacation Rental | Timeshare | 2 nd Home |
|------------------------------|----------------|----------|-----------------|-----------|----------------------|
| Dining | \$121.41 | \$146.99 | \$83.90 | \$108.05 | \$140.38 |
| Transportation | \$32.91 | \$44.86 | \$20.50 | \$35.48 | \$13.89 |
| Recreation and entertainment | \$74.06 | \$100.51 | \$50.87 | \$70.36 | \$43.64 |
| Shopping | \$114.51 | \$159.73 | \$57.35 | \$70.09 | \$88.47 |
| Other/misc. | \$43.65 | \$68.78 | \$23.47 | \$28.66 | \$27.38 |

GPS

Annual Average

Greater Palm Springs Visitor by Accommodation-type

Hotel Vacation Rental Timeshare 2nd Home



VISITOR BY ORIGIN

This portion of the study focused on the origin of the visitor in regard to:

- Country or state of origin
- Purpose of stay: business or leisure
- Frequency of visits
- Method of travel: car, plane and other
- Size of party
- Money spent
- Attractions visited
- Experience ratings: lodging, attractions, service and overall
- Visitor demographics: employment/education; marital status; age and household income

Information analyzed for each of these geographic areas of origin:

- Canada
- Other international countries
- California
- Other U.S. states





OVERALL HIGHLIGHTS

- California visitors make up the bulk of GPS visitors (38%), followed by Canada (20%).
- Destination satisfaction is relatively high across each segment, as well as experience in the destination compared to expectations. International visitors are the most likely to recommend the destination to a friend.

CANADIAN VISITORS

- Canadian visitors peak in Q1 (28%), followed by Q4 (24%).
- Average daily spend is \$353, largely dining (\$126) and shopping (\$95).
- Canadian visitors frequently spend eight or more nights in GPS. Their average daily spending figure may reflect efforts to spread costs over these extended stays.
- Eighty-two and 68% of Canadian and other international visitors shopped at retail stores, respectively, compared with 62% of in-state and 70% of national visitors.
- Most likely to stay in winter months, Q1 and Q4 (28% and 24% of all visitors, respectively).
- Most likely to stay in vacation home rental (28%) or second home (22%).
- Most likely to fly to GPS (75%) into Palm Springs International Airport (85%) and stay over a week (74%).
- More likely to be 55+ (73%), retired (54%) and married (82%).
- More likely to be Caucasian (94%) and two-person travel party (72%).
- Overall, Canadian visitors had a higher participation rate in outdoor activities. They led the domestic segments in visitation to Joshua Tree, participation in both golf and tennis, and hiking. Their ratings of the various outdoor attractions and activities ranged from 4.5 to 4.8 out of 5, generally the highest of the four segments for each activity.
- Canadian visitors generally tend to visit more of the nine cities of GPS.
- Forty-six percent of Canadian respondents indicated that they had enjoyed live entertainment while in the destination, compared with 23% of in-state and 37% of national visitors.

OTHER INTERNATIONAL VISITORS

- Non-Canadian international visitors peak in Q3, accounting for one in six visitors (16%).
- Average daily spend is \$333, largely dining (\$125) and shopping (\$99).
- Most likely to visit in Q3 (16% of all visitors).
- Most likely (with California visitors) to stay in a hotel/resort (45%).

- More likely to be two-person HH (88%) and managerial/professional (40%).
- Most likely to be first trip to GPS (68%) and to fly into LAX (69%).
- Least likely to be satisfied with their accommodations (71%), accommodations' level of service (75%) and the overall destination (79%).
- Visitors from non-Canadian international markets are frequently flying into Los Angeles (69%), compared to 4% and 16% of in-state and domestic fliers, respectively.
- Interestingly, non-Canadian international visitors had a much higher propensity to visit the Palm Springs Aerial Tramway and play tennis.

CALIFORNIA VISITORS

- California visitors peak in Q2 and Q3.
- Have the highest level of daily spend for shopping (\$141) and recreation/entertainment (\$98).
- Average daily spend is \$445.
- Most likely to visit in Q2 and Q3 (47%-48% of all visitors).
- Most likely (with "Other International") to stay in a hotel/resort (44%).
- Most likely to be taking a quick leisure trip (51%); day trippers are 20%, 1-2 night visitors, 28% and short-week visitors (3-4 nights), 25%.
- Most likely to drive to GPS (91%); least likely to fly (6%).
- Most likely to be a frequent visitor (8+ visits) to GPS (26%).
- Equally likely to be Millennials, Gen Y, 45-54, 55-65 or seniors (65+).
- Most likely to not book travel (staying with friends/family) (40%) but for those who do, most likely to book less than a month ahead.
- Allocate more to recreation, retail shopping and other miscellaneous expenditures.

OTHER U.S. VISITORS

- Visitors from other U.S. states peak in Q1 at 40%, but still account for roughly a third of all visitors the rest the year.
- Average daily spend is \$364, mostly dining (\$117) and shopping (\$110).
- Most likely to arrive in Q1 (40% of all visitors).
- After Canadian visitors, most likely to stay 8+ nights (45%).

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Region Visiting From

Number of Survey Responses

Annual Average

12,069

| Canada | Other Inter. | California | Other US |
|--------|--------------|------------|----------|
| 2,416 | 964 | 4,539 | 4,125 |

DEMOGRAPHICS

RESIDENCY REGION

In which region do you reside?

| | | | |
|---------------|-----|--|--|
| International | 8% | | |
| Canada | 20% | | |
| CA | 38% | | |
| Other US | 34% | | |

RESIDENCY COUNTRY

In which country do you reside?

| | | | |
|-----------------------|-----|------|--|
| Canada | 71% | 100% | |
| United Kingdom | 8% | 30% | |
| Germany | 3% | 10% | |
| Australia/New Zealand | 3% | 10% | |
| Mexico | 3% | 9% | |
| China | 3% | 9% | |
| France | 2% | 6% | |
| Japan | 1% | 4% | |
| South America | 1% | 3% | |
| Other | 5% | 18% | |

RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | |
|--------------|-----|------|-----|
| California | 52% | 100% | |
| Washington | 8% | | 16% |
| Oregon | 3% | | 7% |
| Illinois | 3% | | 6% |
| Arizona | 3% | | 5% |
| Minnesota | 3% | | 5% |
| Colorado | 2% | | 5% |
| Nevada | 2% | | 5% |
| New York | 2% | | 4% |
| Texas | 2% | | 4% |
| Michigan | 1% | | 3% |
| Florida | 1% | | 2% |
| Pennsylvania | 1% | | 2% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Region Visiting From

Annual Average

Canada Other Inter. California Other US

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | | |
|----------------------|----|--|--|----|
| Wisconsin | 1% | | | 2% |
| Arkansas | 1% | | | 2% |
| New Jersey | 1% | | | 2% |
| Ohio | 1% | | | 2% |
| Utah | 1% | | | 2% |
| Virginia | 1% | | | 2% |
| Massachusetts | 1% | | | 2% |
| Idaho | 1% | | | 2% |
| Iowa | 1% | | | 1% |
| New Mexico | 1% | | | 1% |
| Tennessee | 1% | | | 1% |
| Georgia | 1% | | | 1% |
| Connecticut | 0% | | | 1% |
| Missouri | 0% | | | 1% |
| Maryland | 0% | | | 1% |
| Oklahoma | 0% | | | 1% |
| Alaska | 0% | | | 1% |
| North Carolina | 0% | | | 1% |
| Montana | 0% | | | 1% |
| Kansas | 0% | | | 1% |
| South Dakota | 0% | | | 1% |
| Indiana | 0% | | | 1% |
| District of Columbia | 0% | | | 1% |
| Nebraska | 0% | | | 1% |
| South Carolina | 0% | | | 1% |
| Kentucky | 0% | | | 1% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Region Visiting From

Annual Average

Canada Other Inter. California Other US

DEMOGRAPHICS

AGE

Which of the following age categories includes your age?

| | | | | | |
|-------|-----|-----|-----|-----|-----|
| 18-34 | 15% | 5% | 15% | 21% | 9% |
| 35-44 | 15% | 7% | 22% | 21% | 11% |
| 45-54 | 18% | 14% | 24% | 20% | 18% |
| 55-64 | 27% | 36% | 24% | 20% | 29% |
| 65+ | 26% | 37% | 15% | 18% | 32% |

GENDER

What is your gender?

| | | | | | |
|--------|-----|-----|-----|-----|-----|
| Male | 52% | 50% | 55% | 51% | 52% |
| Female | 49% | 50% | 45% | 49% | 48% |

INCOME

Please include the category which best describes your household's approximate annual income.

| | | | | | |
|-------------------|-----|-----|-----|-----|-----|
| <60,000 | 18% | 12% | 23% | 21% | 16% |
| 60,000 - 79,999 | 22% | 21% | 18% | 23% | 22% |
| 80,000 - 99,999 | 14% | 16% | 15% | 14% | 15% |
| 100,000 - 159,999 | 29% | 34% | 33% | 26% | 30% |
| 160,000+ | 16% | 18% | 11% | 16% | 16% |

HOUSEHOLD SIZE

(adults only)

Including yourself, how many people live in your household who are over the age of 18?

| | | | | | |
|----|-----|-----|-----|-----|-----|
| 1 | 20% | 32% | 0% | 21% | 16% |
| 2 | 59% | 50% | 88% | 56% | 64% |
| 3 | 10% | 11% | 0% | 10% | 11% |
| 4+ | 11% | 7% | 13% | 13% | 8% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by Region Visiting From

DEMOGRAPHICS

HOUSEHOLD SIZE (under 18)

Including yourself, how many people live in your household who are under the age of 18?

| | Annual Average | Canada | Other Inter. | California | Other US |
|----|----------------|--------|--------------|------------|----------|
| 0 | 80% | 93% | 75% | 77% | 81% |
| 1 | 10% | 4% | 13% | 15% | 4% |
| 2 | 7% | 0% | 13% | 5% | 11% |
| 3+ | 4% | 4% | 0% | 4% | 4% |

EDUCATION

What is your highest level of education?

| | | | | | |
|-----------------------|-----|-----|-----|-----|-----|
| Some high school | 1% | 1% | 1% | 0% | 0% |
| Completed high school | 7% | 9% | 7% | 7% | 5% |
| Some college | 19% | 15% | 16% | 21% | 18% |
| Associates degree | 5% | 4% | 2% | 7% | 5% |
| Bachelors degree | 38% | 40% | 33% | 38% | 38% |
| Graduate degree | 26% | 22% | 30% | 23% | 30% |

MARITAL STATUS

What is your marital status?

| | | | | | |
|----------------------|-----|-----|-----|-----|-----|
| Single | 13% | 5% | 16% | 17% | 11% |
| Married | 73% | 82% | 70% | 70% | 73% |
| Divorced | 4% | 2% | 3% | 3% | 5% |
| Domestic partnership | 5% | 6% | 6% | 5% | 6% |
| Widowed | 4% | 4% | 4% | 3% | 5% |

OCCUPATION

Which of the following best describes your occupation?

| | | | | | |
|---------------------------|-----|-----|-----|-----|-----|
| Retired | 31% | 47% | 19% | 20% | 37% |
| Mngment/Bus. Professional | 25% | 21% | 31% | 27% | 25% |
| Mkting/Sales/Office | 9% | 5% | 8% | 11% | 8% |
| Medical | 8% | 7% | 10% | 9% | 8% |
| Gov. Affairs | 5% | 4% | 8% | 6% | 4% |
| Const./Extraction/Maint. | 4% | 4% | 2% | 5% | 2% |

ETHNICITY

What is your ethnic background?

| | | | | | |
|------------------------|-----|-----|-----|-----|-----|
| Caucasian | 81% | 94% | 62% | 72% | 88% |
| Asian | 5% | 2% | 17% | 7% | 2% |
| Multi-racial | 4% | 2% | 4% | 5% | 3% |
| Hispanic/Latino | 5% | 0% | 12% | 9% | 2% |
| Black/African American | 2% | 0% | 1% | 2% | 2% |
| Other | 1% | 1% | 3% | 1% | 1% |

SURVEY QUESTIONS

BOOKING TRAVEL ARRANGEMENTS

BOOKING TRAVEL

How did you book your travel?

| | Annual Average | Canada | Other Inter. | California | Other US |
|---|----------------|--------|--------------|------------|----------|
| Via the internet | 57.8% | 71% | 65% | 42% | 66% |
| Did not book travel (stayed w/friends/family) | 25.3% | 18% | 13% | 40% | 18% |
| Phoned provider directly | 6.8% | 5% | 2% | 9% | 7% |
| Used a travel agent | 3.9% | 5% | 16% | 1% | 4% |
| Friend/Spouse | 5.7% | 2% | 3% | 9% | 5% |
| Other | 0.3% | 0% | 0% | 0% | 0% |

WHEN TRAVEL BOOKED

How far in advance did you book your travel?

| | Annual Average | Canada | Other Inter. | California | Other US |
|-------------------|----------------|--------|--------------|------------|----------|
| Decided day of | 6% | 2% | 2% | 12% | 3% |
| Less than 1 week | 10% | 2% | 6% | 21% | 4% |
| 1 - 2 weeks | 11% | 5% | 6% | 18% | 7% |
| 3 - 4 weeks | 13% | 9% | 8% | 17% | 12% |
| More than 1 month | 60% | 81% | 76% | 33% | 73% |

LENGTH OF STAY

How many nights are you staying in Greater Palm Springs during your visit?

| | Annual Average | Canada | Other Inter. | California | Other US |
|--------------|----------------|--------|--------------|------------|----------|
| 1 - 2 nights | 14% | 1% | 16% | 28% | 6% |
| 3 - 4 nights | 18% | 6% | 17% | 25% | 16% |
| 5-6 nights | 9% | 6% | 8% | 8% | 12% |
| 7 nights | 13% | 12% | 12% | 9% | 18% |
| 8+ nights | 37% | 74% | 38% | 10% | 45% |

ACCOMMODATIONS

What type of accommodations are you staying in while in Greater Palm Springs?

| | Annual Average | Canada | Other Inter. | California | Other US |
|----------------------|----------------|--------|--------------|------------|----------|
| Hotel/Resort | 31% | 17% | 45% | 44% | 25% |
| Friends/Family | 20% | 15% | 20% | 22% | 21% |
| Vacation home rental | 16% | 28% | 22% | 7% | 17% |
| Timeshare | 14% | 9% | 7% | 14% | 18% |
| 2nd home | 12% | 22% | 3% | 9% | 11% |
| RV Park | 4% | 4% | 1% | 2% | 5% |
| Other | 3% | 4% | 3% | 1% | 3% |

TRAVEL PARTY SIZE

Including yourself, how many people traveled in your immediate party with you on this trip to Greater Palm Springs?

| | Annual Average | Canada | Other Inter. | California | Other US |
|----|----------------|--------|--------------|------------|----------|
| 1 | 13% | 9% | 14% | 14% | 14% |
| 2 | 58% | 72% | 50% | 50% | 61% |
| 3 | 10% | 7% | 11% | 12% | 8% |
| 4 | 12% | 8% | 15% | 15% | 10% |
| 5 | 4% | 2% | 6% | 4% | 4% |
| 6+ | 4% | 3% | 5% | 5% | 3% |

GPS

Annual Average

Greater Palm Springs Visitor by Region Visiting From

Canada Other Inter. California Other US

SURVEY QUESTIONS

TRIP PURPOSE

TRAVEL PURPOSE

Is the primary purpose of your travel for business or leisure?

| | Annual Average | Canada | Other Inter. | California | Other US |
|-------------------------------------|----------------|--------|--------------|------------|----------|
| Leisure | 93% | 97% | 90% | 94% | 91% |
| Business - other | 4% | 2% | 6% | 4% | 5% |
| Business - convention or conference | 3% | 1% | 3% | 2% | 4% |

TYPE OF LEISURE TRAVEL-

Which of the following best describes your leisure trip?

| | | | | | |
|----------------------------|-----|-----|-----|-----|-----|
| General vacation | 43% | 63% | 59% | 22% | 51% |
| Quick leisure trip | 29% | 13% | 17% | 51% | 18% |
| Visiting friends/relatives | 10% | 6% | 11% | 10% | 11% |
| Golf/Hike/Recreation | 7% | 10% | 2% | 4% | 9% |
| Special Event/Festival | 5% | 2% | 4% | 7% | 6% |
| Romantic trip | 3% | 2% | 3% | 4% | 2% |
| Other | 3% | 3% | 2% | 2% | 3% |

FREQUENCY OF LEISURE TRAVEL

How many times have you been to Greater Palm Springs for leisure purposes in the last 3 years?

| | | | | | |
|--------------------|-----|-----|-----|-----|-----|
| First trip | 29% | 24% | 68% | 19% | 34% |
| 2 trips | 16% | 17% | 12% | 15% | 18% |
| 3 - 4 trips | 28% | 34% | 13% | 27% | 29% |
| 5 - 7 trips | 9% | 9% | 3% | 12% | 7% |
| 8+ trips | 17% | 15% | 4% | 26% | 12% |
| Business trip only | 1% | 0% | 1% | 1% | 1% |

TRANSPORTATION

TRANSPORTATION TO GPS

What was your primary method of travel to Greater Palm Springs?

| | | | | | |
|-------------------------|-----|-----|-----|-----|-----|
| Personal vehicle | 53% | 30% | 23% | 91% | 34% |
| Air | 42% | 66% | 75% | 6% | 61% |
| RV | 3% | 3% | 0% | 2% | 4% |
| Charter bus/motor coach | 1% | 0% | 1% | 1% | 0% |
| Train | 0% | 0% | 0% | 0% | 0% |
| Scheduled bus | 0% | 0% | 0% | 0% | 0% |
| Other | 0% | 0% | 1% | 0% | 0% |

What airport did you fly into?

| | | | | | |
|--------------|-----|-----|-----|-----|-----|
| Palm Springs | 60% | 85% | 13% | 69% | 63% |
| Los Angeles | 23% | 9% | 69% | 6% | 16% |
| Ontario | 8% | 3% | 1% | 22% | 11% |
| San Diego | 4% | 1% | 7% | 2% | 5% |
| Santa Ana | 1% | 0% | 0% | 1% | 2% |

GPS

Annual Average

Greater Palm Springs Visitor by Region Visiting From

Canada Other Inter. California Other US

SURVEY QUESTIONS

cont. TRIP PURPOSE

TRANSPORTATION IN GPS

What was your primary means of transportation while in GPS?

| | GPS | Greater Palm Springs Visitor by Region Visiting From | | | |
|--------------|----------------|---|--------------|------------|----------|
| | Annual Average | Canada | Other Inter. | California | Other US |
| Personal car | 57% | 44% | 38% | 84% | 39% |
| Rental car | 37% | 52% | 50% | 10% | 52% |
| Walk | 3% | 3% | 8% | 2% | 4% |
| Taxi | 1% | 0% | 0% | 1% | 2% |
| Other | 3% | 1% | 4% | 2% | 5% |

DESTINATION EXPERIENCE

ASPECTS OF TRIP

Percent of people who rated aspects their trip excellent or very good.

| | | | | | |
|-------------------------------------|-----|-----|-----|-----|-----|
| Satisfaction of your accommodations | 87% | 87% | 71% | 86% | 90% |
| Service provided by accommodations | 86% | 84% | 75% | 86% | 89% |
| Quality of service received | 91% | 90% | 79% | 91% | 92% |
| Overall destination value | 91% | 91% | 83% | 89% | 93% |
| Overall destination satisfaction | 94% | 93% | 79% | 95% | 96% |

DESTINATION FEATURES

Percent of people who rated destination features excellent or very good.

| | | | | | |
|---|-----|-----|-----|-----|-----|
| Accommodations | 93% | 93% | 93% | 92% | 93% |
| Spas | 93% | 93% | 95% | 94% | 92% |
| Shopping | 92% | 93% | 94% | 92% | 92% |
| Live entertainment | 86% | 88% | 88% | 87% | 84% |
| Museums | 95% | 95% | 96% | 96% | 95% |
| Dining | 95% | 95% | 94% | 95% | 94% |
| Nightlife | 85% | 82% | 86% | 87% | 83% |
| Recreation sports facilities (golf, tennis) | 97% | 97% | 94% | 98% | 98% |
| Outdoor recreation (hiking, jeep tours) | 97% | 96% | 96% | 98% | 96% |
| Palm Springs Aerial Tramway | 96% | 94% | 97% | 97% | 96% |
| National parks/Monuments | 95% | 96% | 95% | 96% | 93% |
| Golf courses | 98% | 99% | 99% | 97% | 99% |
| Tennis facilities | 96% | 99% | 96% | 94% | 96% |
| Cycling | 88% | 92% | 93% | 89% | 82% |
| Hiking | 95% | 97% | 96% | 96% | 94% |
| Casinos | 93% | 92% | 99% | 93% | 93% |
| The Living Desert | 96% | 97% | 98% | 97% | 94% |

SURVEY QUESTIONS

DESTINATION EXPERIENCE

RETURNING TO GREATER PALM SPRINGS

Are you planning on returning to Greater Palm Springs for leisure purposes?

| | Annual Average | Canada | Other Inter. | California | Other US |
|----------------|----------------|--------|--------------|------------|----------|
| Definitely | 68% | 69% | 67% | 71% | 63% |
| Likely | 21% | 21% | 13% | 21% | 23% |
| Possible | 9% | 9% | 13% | 7% | 12% |
| Unlikely | 1% | 0% | 4% | 0% | 2% |
| Definitely not | 1% | 1% | 4% | 0% | 0% |

ACTUAL VERSUS ANTICIPATED EXPERIENCE

Please rate your actual experience in Greater Palm Springs compared to what you anticipated your experience would be.

| | Annual Average | Canada | Other Inter. | California | Other US |
|--------------------|----------------|--------|--------------|------------|----------|
| Much better | 30% | 26% | 38% | 28% | 32% |
| Somewhat better | 29% | 30% | 29% | 30% | 28% |
| Equals Anticipated | 38% | 40% | 29% | 38% | 38% |
| Somewhat worse | 3% | 3% | 4% | 3% | 2% |
| Much worse | 1% | 1% | 0% | 2% | 0% |

RECOMMENDATIONS TO FAMILY AND FRIENDS

How likely would you be to recommend visiting Greater Palm Springs to family, friends or associates?

| | Annual Average | Canada | Other Inter. | California | Other US |
|----------------------------|----------------|--------|--------------|------------|----------|
| Very unlikely | 3% | 4% | 4% | 2% | 3% |
| Somewhat unlikely | 1% | 1% | 4% | 1% | 1% |
| Neither likely or unlikely | 2% | 3% | 0% | 2% | 2% |
| Somewhat likely | 17% | 12% | 21% | 16% | 20% |
| Very likely | 77% | 80% | 71% | 77% | 75% |

PERCEPTION OF DESTINATION

Based on your experience in Greater Palm Springs during this visit, what was your overall perception of the destination?

| | Annual Average | Canada | Other Inter. | California | Other US |
|-------------------|----------------|--------|--------------|------------|----------|
| Very positive | 85% | 86% | 83% | 85% | 85% |
| Somewhat positive | 13% | 11% | 17% | 11% | 14% |
| Neutral | 2% | 1% | 0% | 2% | 1% |
| Somewhat negative | 1% | 0% | 0% | 1% | 1% |
| Very negative | 1% | 1% | 0% | 0% | 0% |

GPS

Annual Average

Greater Palm Springs Visitor by Region Visiting From

Canada Other Inter. California Other US

SURVEY QUESTIONS

DESTINATION EXPERIENCE

EXPENSES

Which of the following categories did your personal travel party incur expenses while in the destination?

| | Annual Average | Canada | Other Inter. | California | Other US |
|------------------------------|----------------|--------|--------------|------------|----------|
| Dining out | 95% | 99% | 100% | 92% | 94% |
| Retail shopping | 77% | 93% | 96% | 65% | 74% |
| Recreation and entertainment | 72% | 78% | 67% | 62% | 79% |
| Other | 51% | 61% | 50% | 45% | 49% |
| Local transportation | 44% | 64% | 50% | 22% | 52% |
| None of the above | 2% | 0% | 0% | 3% | 4% |

DAILY SPENDING

Please indicate your personal travel party's average daily spend while in Greater Palm Springs during your trip.

| | Annual Average | Canada | Other Inter. | California | Other US |
|------------------------------|----------------|----------|--------------|------------|----------|
| Dining | \$121.41 | \$125.79 | \$125.22 | \$125.50 | \$117.27 |
| Transportation | \$32.91 | \$44.34 | \$26.11 | \$16.62 | \$33.55 |
| Recreation and entertainment | \$74.06 | \$53.17 | \$57.50 | \$98.27 | \$70.29 |
| Shopping | \$114.51 | \$95.28 | \$98.57 | \$141.03 | \$109.89 |
| Other/misc. | \$43.65 | \$34.61 | \$25.28 | \$63.15 | \$33.12 |

GPS

Annual Average

Greater Palm Springs Visitor by Region Visiting From

Canada Other Inter. California Other US



VISITOR BY CITY

This portion of the study focused on the visitor by city in Greater Palm Springs, granting an in-depth visitor profile of the visitor stay within each of the following eight cities:

- Palm Springs
- Desert Hot Springs
- Cathedral City
- Rancho Mirage
- Palm Desert
- Indian Wells
- La Quinta
- Indio

Information analyzed for each city stay included:

- Demographics
- Booking mode and length of stay
- Size of travel party
- Trip purpose and frequency
- Transportation
- Destination experience
- Spending



OVERALL HIGHLIGHTS, BY CITY

- Each of the cities in GPS is similar to its neighbors, yet each has its unique qualities.
- With the exception of one community, the likelihood of recommending GPS to friends/family is at least 92%.
- Cathedral City and Palm Desert are least likely to have children as visitors; La Quinta is most likely to have married couples and children as visitors.
- Hispanic/Latino visitors prefer Indio; Asian visitors prefer Desert Hot Springs and Indian Wells.
- Palm Desert visitors are most likely to stay for a week or more.
- Palm Springs attracts the most first-time visitors to GPS.
- UK visitors comprise 18% of all international guests.

PALM SPRINGS

- One in five Palm Springs visitors are single (20%).
- Nearly half of the trips to Palm Springs were first trips to Greater Palm Springs (49%).

DESERT HOT SPRINGS

- UK visitors comprise 25% of all international guests.
- German and Mexican visitors each comprise 13% of all international guests.

CATHEDRAL CITY

- Has the highest proportion of visitors who golf or hike (16%).

RANCHO MIRAGE

- After La Quinta, has the wealthiest visitors (60% of guests have annual income of \$100K+).

PALM DESERT

- Most likely to have retired visitors (26%).
- Most likely to stay 7+ nights (33%).

INDIAN WELLS

- UK, Chinese and Japanese guests comprise 13%-14% of all international visitors.

LA QUINTA

- Most likely to have guests who fly into GPS (54%).

INDIO

- Californians comprise 72% of all visitors.
- German, Australian/New Zealand and Chinese guests each comprise 10% of all international visitors to Indio.

DEMOGRAPHICS, BY CITY

- Half of Palm Desert visitors and nearly half (47%) of Indio visitors are 55+.
- Nearly half (48%) of Desert Hot Springs visitors are 18-44.
- Male visitors outnumber female visitors by the widest margins in Indian Wells (60%/40%), Palm Desert (58%/42%) and both Cathedral City and La Quinta (56%/44%).
- La Quinta, Indian Wells and Rancho Mirage attract the wealthiest (\$100K+ income) visitors (69%, 60% and 60%, respectively).
- Two-adult households account for 100% of Cathedral City and Palm Desert visitors.
- One in five Palm Springs visitors are single (20%).
- 88% of La Quinta visitors, 83% of Palm Desert visitors and 81% of Rancho Mirage visitors are married or in a domestic partnership.
- La Quinta and Indian Wells have the highest proportion of management/business/professional visitors (47 and 44%, respectively).
- 17% of Indio visitors are Hispanic or Latino, and 14% of Desert Hot Springs visitors and 13% of Indian Wells visitors are Asian.

BOOKING MODE AND LENGTH OF STAY, BY CITY

- While visiting guests are significantly more likely to book via the internet, regardless of where stayed, in Indio over a fourth (27%) phoned the provider directly.
- Over two-thirds of La Quinta visitors (68%) book their travel over a month



in advance.

- Three in five Indio visitors (60%) stay just 1-2 nights.
- Two in five La Quinta visitors (42%) stay 3- 4 nights.

SIZE OF TRAVEL PARTY, BY CITY

- Two-person travel parties account for a majority of visitors, and are highest in Desert Hot Springs (63%) and Indian Wells (61%).
- Four-person travel parties are highest in Cathedral City (18%).

TRIP PURPOSE AND FREQUENCY, BY CITY

- While most visitors in Greater Palm Springs are on leisure trips, 21% of Indian Wells guests are on business trips.
- Consistent with the trip length for Indio, over three fifths of leisure trips are “Quick leisure trips” (62%).
- One in six leisure trips to Desert Hot Springs are “romantic,” and the same proportion of trips to Cathedral City are for golf/hiking/recreation.
- Nearly half of the trips to Palm Springs were first trips to GPS (49%) while a third of trips to Indio and over a quarter of trips to La Quinta were third trips to the area.

TRANSPORTATION, BY CITY

- While half of visitors to Greater Palm Springs drive in their personal vehicle to GPS, the proportions are highest in Indio (83%), Desert Hot Springs (66%) and Cathedral City (64%).
- The highest proportion of flights into GPS are La Quinta visitors (54%), over half of whom (56%) fly into Palm Springs International Airport.
- Rental car use for transportation within GPS is highest in Desert Hot Springs (100%), La Quinta (54%) and Palm Desert (50%).

DESTINATION EXPERIENCE, BY CITY

- Ratings of accommodations and GPS in general are very high with few notable exceptions.
- Desire to return to GPS is generally very high.
- Likelihood to recommend GPS to friends/family is generally high in most cities.



SPENDING, BY CITY

- Visitors are consistently most likely to incur expenses dining out and shopping.
- Daily spending on dining is highest in Indian Wells (\$199).
- Daily spending on retail shopping is highest in La Quinta (\$515).
- Daily spending on transportation and recreation/entertainment is highest in Indio (\$150 and \$246, respectively).

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by City Stay (based on city location of hotel)

Number of Survey Responses

Annual Average

12,069

| PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-------|-----|----|-----|-----|-----|-----|-------|
| 1,456 | 80 | 73 | 430 | 758 | 313 | 142 | 93 |

DEMOGRAPHICS

RESIDENCY REGION

In which region do you reside?

| Region | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|---------------|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| International | 8% | 17% | 11% | 4% | 7% | 8% | 10% | 9% | 3% |
| Canada | 20% | 13% | 9% | 14% | 9% | 15% | 8% | 18% | 8% |
| CA | 38% | 43% | 56% | 48% | 51% | 44% | 52% | 44% | 72% |
| Other US | 34% | 28% | 24% | 34% | 33% | 33% | 30% | 30% | 17% |

RESIDENCY COUNTRY

In which country do you reside?

| Country | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-----------------------|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| Canada | 71% | 42% | 44% | 77% | 57% | 65% | 43% | 68% | 70% |
| United Kingdom | 8% | 18% | 25% | 0% | 21% | 9% | 14% | 5% | 0% |
| Germany | 3% | 7% | 13% | 8% | 1% | 4% | 4% | 3% | 10% |
| Australia/New Zealand | 3% | 9% | 0% | 8% | 3% | 4% | 0% | 3% | 10% |
| Mexico | 3% | 2% | 13% | 0% | 1% | 1% | 2% | 0% | 0% |
| China | 3% | 3% | 0% | 0% | 3% | 3% | 14% | 0% | 10% |
| France | 2% | 5% | 0% | 0% | 1% | 3% | 0% | 3% | 0% |
| Japan | 1% | 1% | 0% | 0% | 0% | 3% | 13% | 3% | 0% |
| South America | 1% | 1% | 0% | 0% | 3% | 1% | 4% | 0% | 0% |
| Other | 5% | 11% | 6% | 8% | 9% | 6% | 7% | 16% | 0% |

RESIDENCY U.S. STATE

In which U.S. state do you reside?

| U.S. State | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|--------------|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| California | 52% | 60% | 70% | 58% | 61% | 57% | 64% | 59% | 81% |
| Washington | 8% | 5% | 3% | 2% | 5% | 6% | 5% | 9% | 1% |
| Oregon | 3% | 2% | 2% | 0% | 3% | 2% | 2% | 3% | 0% |
| Illinois | 3% | 1% | 0% | 0% | 3% | 3% | 4% | 1% | 0% |
| Arizona | 3% | 4% | 5% | 5% | 4% | 4% | 4% | 1% | 2% |
| Minnesota | 3% | 1% | 2% | 0% | 1% | 1% | 2% | 2% | 2% |
| Colorado | 2% | 2% | 0% | 5% | 2% | 2% | 1% | 1% | 4% |
| Nevada | 2% | 3% | 0% | 5% | 2% | 1% | 0% | 1% | 2% |
| New York | 2% | 3% | 2% | 2% | 2% | 2% | 0% | 4% | 0% |
| Texas | 2% | 2% | 2% | 0% | 2% | 2% | 4% | 3% | 1% |
| Michigan | 1% | 1% | 0% | 3% | 1% | 2% | 1% | 0% | 2% |
| Florida | 1% | 1% | 0% | 0% | 1% | 2% | 0% | 3% | 0% |
| Pennsylvania | 1 | 1% | 0% | 3% | 1% | 2% | 1% | 1% | 0% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by City Stay (based on city location of hotel)

Annual Average

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----------------------|----|----|-----|----|----|----|----|----|-------|
| Wisconsin | 1% | 0% | 0% | 2% | 1% | 1% | 1% | 1% | 0% |
| Arkansas | 1% | 1% | 3% | 0% | 1% | 1% | 0% | 1% | 0% |
| New Jersey | 1% | 1% | 0% | 5% | 1% | 1% | 0% | 0% | 0% |
| Ohio | 1% | 1% | 0% | 0% | 1% | 1% | 0% | 0% | 0% |
| Utah | 1% | 1% | 0% | 0% | 0% | 1% | 1% | 1% | 1% |
| Virginia | 1% | 1% | 0% | 2% | 1% | 1% | 1% | 1% | 1% |
| Massachusetts | 1% | 1% | 2% | 2% | 1% | 1% | 0% | 2% | 0% |
| Idaho | 1% | 1% | 0% | 0% | 1% | 1% | 0% | 0% | 0% |
| Iowa | 1% | 0% | 0% | 0% | 1% | 0% | 2% | 0% | 0% |
| New Mexico | 1% | 1% | 2% | 0% | 1% | 1% | 0% | 0% | 0% |
| Tennessee | 1% | 0% | 0% | 2% | 0% | 1% | 0% | 1% | 1% |
| Georgia | 1% | 1% | 3% | 0% | 0% | 1% | 0% | 0% | 0% |
| Connecticut | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 1% | 0% |
| Missouri | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Maryland | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 1% | 0% |
| Oklahoma | 0% | 0% | 0% | 0% | 1% | 0% | 1% | 0% | 0% |
| Alaska | 0% | 0% | 2% | 2% | 0% | 0% | 0% | 0% | 0% |
| North Carolina | 0% | 0% | 0% | 0% | 0% | 1% | 2% | 1% | 0% |
| Montana | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 0% | 0% |
| Kansas | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% |
| South Dakota | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Indiana | 0% | 0% | 0% | 0% | 1% | 0% | 1% | 0% | 0% |
| District of Columbia | 0% | 1% | 0% | 0% | 0% | 1% | 1% | 1% | 0% |
| Nebraska | 0% | 0% | 0% | 0% | 1% | 0% | 1% | 0% | 0% |
| South Carolina | 0% | 0% | 0% | 2% | 0% | 1% | 0% | 0% | 0% |
| Kentucky | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 1% | 0% |
| North Dakota | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Maine | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 0% | 0% |
| Louisiana | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Alabama | 0% | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 0% |
| Hawaii | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% |
| Mississippi | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% |
| New Hampshire | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Wyoming | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Vermont | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by City Stay (based on city location of hotel)

Annual Average

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | | | | | | | |
|---------------|----|----|----|----|----|----|----|----|----|
| Delaware | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% |
| Rhode Island | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| West Virginia | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

AGE

Which of the following age categories includes your age?

| | | | | | | | | | |
|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 18-34 | 15% | 19% | 30% | 23% | 11% | 13% | 14% | 10% | 18% |
| 35-44 | 15% | 20% | 18% | 7% | 22% | 15% | 28% | 24% | 11% |
| 45-54 | 18% | 21% | 18% | 27% | 27% | 22% | 25% | 23% | 22% |
| 55-64 | 27% | 22% | 21% | 32% | 24% | 26% | 23% | 28% | 31% |
| 65+ | 26% | 16% | 11% | 10% | 17% | 24% | 10% | 16% | 16% |

GENDER

What is your gender?

| | | | | | | | | | |
|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Male | 52% | 50% | 48% | 56% | 54% | 58% | 60% | 56% | 50% |
| Female | 49% | 50% | 53% | 44% | 47% | 42% | 40% | 44% | 50% |

INCOME

Please include the category which best describes your household's approximate annual income.

| | | | | | | | | | |
|-------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| <60,000 | 18% | 19% | 20% | 26% | 10% | 13% | 12% | 11% | 32% |
| 60,000 - 79,999 | 22% | 23% | 27% | 17% | 20% | 16% | 18% | 11% | 17% |
| 80,000 - 99,999 | 14% | 16% | 14% | 23% | 11% | 13% | 11% | 8% | 18% |
| 100,000 - 159,999 | 29% | 29% | 26% | 28% | 29% | 37% | 31% | 32% | 21% |
| 160,000+ | 16% | 13% | 14% | 6% | 30% | 21% | 29% | 37% | 12% |

HOUSEHOLD SIZE

(adults only)

Including yourself, how many people live in your household who are over the age of 18?

| | | | | | | | | | |
|----|-----|-----|-----|------|-----|------|-----|-----|-----|
| 1 | 20% | 16% | 18% | 0% | 16% | 0% | 16% | 22% | 23% |
| 2 | 59% | 64% | 82% | 100% | 53% | 100% | 53% | 56% | 51% |
| 3 | 10% | 11% | 0% | 0% | 11% | 0% | 22% | 0% | 9% |
| 4+ | 11% | 9% | 0% | 0% | 21% | 0% | 9% | 22% | 16% |

SURVEY QUESTIONS

GPS

Greater Palm Springs Visitor by City Stay (based on city location of hotel)

Annual Average

DEMOGRAPHICS

HOUSEHOLD SIZE (under 18)

Including yourself, how many people live in your household who are under the age of 18?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----|----------------|-----|-----|------|-----|------|-----|-----|-------|
| 0 | 80% | 84% | 91% | 100% | 84% | 100% | 72% | 33% | 81% |
| 1 | 10% | 4% | 0% | 0% | 11% | 0% | 13% | 44% | 12% |
| 2 | 7% | 9% | 9% | 0% | 0% | 0% | 9% | 0% | 7% |
| 3+ | 4% | 2% | 0% | 0% | 5% | 0% | 6% | 22% | 0% |

EDUCATION

What is your highest level of education?

| | | | | | | | | | |
|-----------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Some high school | 1% | 0% | 3% | 0% | 0% | 1% | 0% | 0% | 0% |
| Completed high school | 7% | 6% | 9% | 8% | 3% | 6% | 4% | 2% | 6% |
| Some college | 19% | 20% | 20% | 24% | 12% | 15% | 10% | 11% | 36% |
| Associates degree | 5% | 6% | 10% | 4% | 5% | 5% | 3% | 5% | 6% |
| Bachelors degree | 38% | 37% | 28% | 35% | 45% | 40% | 55% | 47% | 38% |
| Graduate degree | 26% | 26% | 29% | 22% | 30% | 30% | 25% | 30% | 14% |

MARITAL STATUS

What is your marital status?

| | | | | | | | | | |
|----------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Single | 13% | 20% | 16% | 14% | 12% | 11% | 15% | 6% | 17% |
| Married | 73% | 63% | 60% | 60% | 76% | 78% | 76% | 82% | 62% |
| Divorced | 4% | 3% | 4% | 10% | 3% | 3% | 4% | 1% | 4% |
| Domestic partnership | 5% | 9% | 10% | 10% | 5% | 5% | 3% | 6% | 9% |
| Widowed | 4% | 3% | 4% | 5% | 2% | 2% | 2% | 2% | 4% |

OCCUPATION

Which of the following best describes your occupation?

| | | | | | | | | | |
|---------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Retired | 31% | 20% | 16% | 12% | 16% | 26% | 11% | 13% | 23% |
| Mngment/Bus. Professional | 25% | 29% | 38% | 25% | 38% | 30% | 44% | 47% | 27% |
| Mkting/Sales/Office | 9% | 10% | 10% | 8% | 11% | 9% | 15% | 11% | 5% |
| Medical | 8% | 9% | 8% | 12% | 11% | 10% | 8% | 6% | 10% |
| Gov. Affairs | 5% | 7% | 8% | 7% | 6% | 7% | 4% | 3% | 5% |
| Const./Extraction/Maint. | 4% | 4% | 4% | 11% | 2% | 3% | 3% | 1% | 3% |

ETHNICITY

What is your ethnic background?

| | | | | | | | | | |
|------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Caucasian | 81% | 76% | 70% | 68% | 77% | 80% | 75% | 83% | 59% |
| Asian | 5% | 6% | 14% | 8% | 8% | 8% | 13% | 7% | 12% |
| Multi-racial | 4% | 4% | 4% | 7% | 5% | 3% | 2% | 2% | 8% |
| Hispanic/Latino | 5% | 6% | 9% | 7% | 5% | 4% | 5% | 2% | 17% |
| Black/African American | 2% | 3% | 0% | 7% | 2% | 2% | 3% | 1% | 1% |
| Other | 1% | 3% | 1% | 1% | 2% | 1% | 1% | 2% | 2% |

SURVEY QUESTIONS

BOOKING TRAVEL ARRANGEMENTS

BOOKING TRAVEL

How did you book your travel?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|---|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| Via the internet | 57.8% | 67% | 66% | 64% | 62% | 66% | 69% | 73% | 53% |
| Did not book travel (stayed w/friends/family) | 25.3% | 9% | 6% | 11% | 9% | 10% | 4% | 6% | 15% |
| Phoned provider directly | 6.8% | 8% | 13% | 4% | 14% | 9% | 11% | 9% | 27% |
| Used a travel agent | 3.9% | 6% | 6% | 0% | 5% | 5% | 7% | 6% | 1% |
| Friend/Spouse | 5.7% | 3% | 1% | 14% | 2% | 3% | 2% | 1% | 1% |
| Other | 0.3% | 6% | 8% | 7% | 7% | 7% | 8% | 5% | 3% |

WHEN TRAVEL BOOKED

How far in advance did you book your travel?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-------------------|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| Decided day of | 6% | 3% | 5% | 1% | 3% | 1% | 2% | 1% | 5% |
| Less than 1 week | 10% | 11% | 10% | 14% | 13% | 10% | 16% | 9% | 11% |
| 1 - 2 weeks | 11% | 15% | 19% | 12% | 13% | 10% | 16% | 14% | 16% |
| 3 - 4 weeks | 13% | 19% | 21% | 26% | 17% | 18% | 18% | 7% | 38% |
| More than 1 month | 60% | 51% | 45% | 47% | 55% | 59% | 48% | 68% | 29% |

LENGTH OF STAY

How many nights are you staying in Greater Palm Springs during your visit?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|--------------|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| 1 - 2 nights | 14% | 35% | 39% | 32% | 26% | 25% | 33% | 18% | 60% |
| 3 - 4 nights | 18% | 33% | 35% | 25% | 37% | 28% | 35% | 42% | 22% |
| 5-6 nights | 9% | 11% | 10% | 18% | 12% | 15% | 14% | 13% | 2% |
| 7 nights | 13% | 10% | 8% | 15% | 16% | 17% | 9% | 11% | 4% |
| 8+ nights | 37% | 11% | 9% | 11% | 9% | 16% | 9% | 16% | 12% |

ACCOMMODATIONS

What type of accommodations are you staying in while in Greater Palm Springs?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----------------------|----------------|------|------|------|------|------|------|------|-------|
| Hotel/Resort | 31% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Friends/Family | 20% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Vacation home rental | 16% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Timeshare | 14% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| 2nd home | 12% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| RV Park | 4% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Other | 3% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

TRAVEL PARTY SIZE

Including yourself, how many people traveled in your immediate party with you on this trip to Greater Palm Springs?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----|----------------|-----|-----|-----|-----|-----|-----|-----|-------|
| 1 | 13% | 13% | 9% | 7% | 11% | 9% | 12% | 10% | 16% |
| 2 | 58% | 60% | 63% | 52% | 56% | 60% | 61% | 58% | 58% |
| 3 | 10% | 8% | 10% | 15% | 12% | 10% | 11% | 11% | 10% |
| 4 | 12% | 11% | 11% | 18% | 13% | 12% | 11% | 13% | 12% |
| 5 | 4% | 3% | 4% | 4% | 3% | 4% | 2% | 1% | 2% |
| 6+ | 4% | 5% | 4% | 4% | 4% | 5% | 4% | 7% | 2% |

GPS

Greater Palm Springs Visitor by City Stay (based on city location of hotel)

SURVEY QUESTIONS

TRIP PURPOSE

TRAVEL PURPOSE

Is the primary purpose of your travel for business or leisure?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-------------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Annual Average | | | | | | | | | |
| Leisure | 93% | 92% | 96% | 86% | 88% | 88% | 79% | 92% | 92% |
| Business - other | 4% | 5% | 1% | 5% | 4% | 6% | 7% | 4% | 5% |
| Business - convention or conference | 3% | 3% | 3% | 8% | 7% | 6% | 15% | 4% | 2% |

TYPE OF LEISURE TRAVEL-

Which of the following best describes your leisure trip?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| General vacation | 43% | 40% | 36% | 28% | 35% | 43% | 25% | 34% | 16% |
| Quick leisure trip | 29% | 36% | 39% | 36% | 40% | 34% | 35% | 30% | 62% |
| Visiting friends/relatives | 10% | 3% | 1% | 6% | 5% | 7% | 6% | 8% | 7% |
| Golf/Hike/Recreation | 7% | 4% | 1% | 16% | 5% | 6% | 13% | 11% | 5% |
| Special Event/Festival | 5% | 8% | 5% | 9% | 7% | 4% | 11% | 12% | 7% |
| Romantic trip | 3% | 7% | 17% | 3% | 6% | 4% | 8% | 4% | 1% |
| Other | 3% | 2% | 0% | 2% | 2% | 2% | 2% | 1% | 2% |

FREQUENCY OF LEISURE TRAVEL

How many times have you been to Greater Palm Springs for leisure purposes in the last 3 years?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| First trip | 29% | 49% | 43% | 41% | 38% | 41% | 34% | 32% | 19% |
| 2 trips | 16% | 16% | 24% | 19% | 15% | 19% | 18% | 17% | 12% |
| 3 - 4 trips | 28% | 18% | 19% | 19% | 22% | 24% | 20% | 27% | 33% |
| 5 - 7 trips | 9% | 6% | 9% | 12% | 9% | 6% | 10% | 7% | 16% |
| 8+ trips | 17% | 8% | 5% | 8% | 12% | 9% | 13% | 14% | 18% |
| Business trip only | 1% | 2% | 1% | 0% | 4% | 2% | 5% | 3% | 1% |

TRANSPORTATION

TRANSPORTATION TO GPS

What was your primary method of travel to Greater Palm Springs?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Personal vehicle | 53% | 52% | 66% | 64% | 57% | 54% | 58% | 46% | 83% |
| Air | 42% | 46% | 26% | 34% | 41% | 45% | 41% | 54% | 13% |
| RV | 3% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% |
| Charter bus/motor coach | 1% | 1% | 3% | 1% | 0% | 0% | 1% | 0% | 1% |
| Train | 0% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 1% |
| Scheduled bus | 0% | 0% | 4% | 0% | 0% | 0% | 0% | 0% | 0% |
| Other | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% |

What airport did you fly into?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Palm Springs | 60% | 44% | 50% | 63% | 57% | 52% | 64% | 56% | 80% |
| Los Angeles | 23% | 34% | 20% | 25% | 26% | 26% | 17% | 26% | 20% |
| Ontario | 8% | 7% | 10% | 13% | 10% | 6% | 10% | 7% | 0% |
| San Diego | 4% | 7% | 10% | 0% | 1% | 7% | 4% | 7% | 0% |
| Santa Ana | 1% | 0% | 0% | 0% | 1% | 4% | 0% | 2% | 0% |

SURVEY QUESTIONS

cont. TRIP PURPOSE

TRANSPORTATION IN GPS

What was your primary means of transportation while in GPS?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|--------------|-----|-----|-----|------|-----|-----|-----|-----|-------|
| Personal car | 57% | 48% | 60% | 0% | 56% | 43% | 51% | 31% | 77% |
| Rental car | 37% | 37% | 40% | 100% | 36% | 50% | 26% | 54% | 21% |
| Walk | 3% | 13% | 0% | 0% | 3% | 2% | 0% | 15% | 2% |
| Taxi | 1% | 0% | 0% | 0% | 3% | 2% | 9% | 0% | 0% |
| Other | 3% | 3% | 0% | 0% | 3% | 2% | 14% | 0% | 0% |

DESTINATION EXPERIENCE

ASPECTS OF TRIP

Percent of people who rated aspects their trip excellent or very good.

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-------------------------------------|-----|-----|-----|------|-----|-----|------|-----|-------|
| Satisfaction of your accommodations | 87% | 82% | 80% | 100% | 92% | 89% | 92% | 85% | 93% |
| Service provided by accommodations | 86% | 82% | 87% | 50% | 97% | 91% | 100% | 85% | 95% |
| Quality of service received | 91% | 87% | 93% | 100% | 94% | 95% | 94% | 69% | 95% |
| Overall destination value | 91% | 95% | 93% | 100% | 89% | 93% | 86% | 77% | 93% |
| Overall destination satisfaction | 94% | 95% | 93% | 100% | 97% | 98% | 92% | 77% | 98% |

DESTINATION FEATURES

Percent of people who rated destination features excellent or very good.

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|---|-----|-----|------|------|------|-----|------|------|-------|
| Accommodations | 93% | 86% | 84% | 77% | 94% | 91% | 92% | 95% | 86% |
| Spas | 93% | 89% | 95% | 88% | 96% | 95% | 94% | 100% | 77% |
| Shopping | 92% | 90% | 83% | 87% | 94% | 94% | 96% | 92% | 77% |
| Live entertainment | 86% | 83% | 83% | 75% | 89% | 84% | 88% | 79% | 88% |
| Museums | 95% | 95% | 89% | 93% | 94% | 97% | 97% | 97% | 93% |
| Dining | 95% | 92% | 93% | 88% | 96% | 95% | 97% | 95% | 89% |
| Nightlife | 85% | 88% | 93% | 79% | 88% | 86% | 89% | 83% | 83% |
| Recreation sports facilities (golf, tennis) | 97% | 95% | 100% | 100% | 100% | 99% | 100% | 92% | 0% |
| Outdoor recreation (hiking, jeep tours) | 97% | 96% | 95% | 90% | 98% | 97% | 99% | 100% | 100% |
| Palm Springs Aerial Tramway | 96% | 96% | 100% | 97% | 98% | 96% | 96% | 94% | 95% |
| National parks/Monuments | 95% | 94% | 95% | 86% | 94% | 93% | 93% | 100% | 100% |
| Golf courses | 98% | 95% | 100% | 100% | 96% | 98% | 100% | 100% | 100% |
| Tennis facilities | 96% | 95% | 0% | 86% | 95% | 90% | 100% | 100% | 89% |
| Cycling | 88% | 89% | 100% | 50% | 84% | 89% | 100% | 82% | 90% |
| Hiking | 95% | 94% | 100% | 86% | 98% | 95% | 94% | 89% | 83% |
| Casinos | 93% | 92% | 100% | 96% | 95% | 93% | 91% | 94% | 100% |
| The Living Desert | 96% | 96% | 100% | 88% | 96% | 95% | 98% | 86% | 88% |

SURVEY QUESTIONS

DESTINATION EXPERIENCE

RETURNING TO GREATER PALM SPRINGS

Are you planning on returning to Greater Palm Springs for leisure purposes?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Annual Average | | | | | | | | | |
| Definitely | 68% | 68% | 60% | 0% | 64% | 73% | 42% | 31% | 79% |
| Likely | 21% | 22% | 33% | 50% | 25% | 16% | 25% | 46% | 19% |
| Possible | 9% | 10% | 7% | 50% | 8% | 7% | 33% | 8% | 2% |
| Unlikely | 1% | 0% | 0% | 0% | 3% | 5% | 0% | 0% | 0% |
| Definitely not | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 15% | 0% |

ACTUAL VERSUS ANTICIPATED EXPERIENCE

Please rate your actual experience in Greater Palm Springs compared to what you anticipated your experience would be.

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Much better | 30% | 34% | 40% | 50% | 39% | 30% | 19% | 15% | 35% |
| Somewhat better | 29% | 27% | 20% | 0% | 33% | 23% | 31% | 38% | 28% |
| Equals Anticipated | 38% | 34% | 33% | 50% | 28% | 43% | 44% | 23% | 37% |
| Somewhat worse | 3% | 5% | 7% | 0% | 0% | 5% | 3% | 8% | 0% |
| Much worse | 1% | 0% | 0% | 0% | 0% | 0% | 3% | 15% | 0% |

RECOMMENDATIONS TO FAMILY AND FRIENDS

How likely would you be to recommend visiting Greater Palm Springs to family, friends or associates?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|----------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Very unlikely | 3% | 0% | 0% | 0% | 0% | 2% | 3% | 15% | 2% |
| Somewhat unlikely | 1% | 1% | 0% | 0% | 6% | 0% | 3% | 8% | 0% |
| Neither likely or unlikely | 2% | 3% | 0% | 0% | 0% | 5% | 3% | 0% | 0% |
| Somewhat likely | 17% | 19% | 33% | 50% | 17% | 11% | 19% | 38% | 19% |
| Very likely | 77% | 77% | 67% | 50% | 78% | 82% | 72% | 38% | 79% |

PERCEPTION OF DESTINATION-

Based on your experience in Greater Palm Springs during this visit, what was your overall perception of the destination?

| | GPS | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|-------------------|-----|-----|-----|------|-----|-----|-----|-----|-------|
| Very positive | 85% | 81% | 87% | 100% | 86% | 80% | 86% | 62% | 88% |
| Somewhat positive | 13% | 18% | 7% | 0% | 11% | 18% | 11% | 15% | 12% |
| Neutral | 2% | 0% | 7% | 0% | 0% | 2% | 3% | 0% | 0% |
| Somewhat negative | 1% | 1% | 0% | 0% | 3% | 0% | 0% | 0% | 0% |
| Very negative | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 23% | 0% |

SURVEY QUESTIONS

DESTINATION EXPERIENCE

EXPENSES

Which of the following categories did your personal travel party incur expenses while in the destination?

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|------------------------------|----------------|-----|-----|------|------|-----|-----|------|-------|
| Dining out | 95% | 92% | 93% | 100% | 100% | 93% | 92% | 100% | 88% |
| Retail shopping | 77% | 72% | 67% | 50% | 72% | 84% | 67% | 69% | 47% |
| Recreation and entertainment | 72% | 68% | 80% | 100% | 61% | 77% | 42% | 69% | 40% |
| Other | 51% | 59% | 40% | 0% | 50% | 48% | 47% | 46% | 42% |
| Local transportation | 44% | 47% | 27% | 100% | 42% | 55% | 44% | 69% | 7% |
| None of the above | 2% | 3% | 0% | 0% | 0% | 2% | 8% | 0% | 12% |

DAILY SPENDING

Please indicate your personal travel party's average daily spend while in Greater Palm Springs during your trip.

| | Annual Average | PS | DHS | CC | RM | PD | IW | LQ | INDIO |
|------------------------------|----------------|----------|----------|---------|----------|----------|----------|----------|----------|
| Dining | \$121.41 | \$160.41 | \$79.29 | \$57.50 | \$150.83 | \$111.19 | \$199.22 | \$178.08 | \$133.47 |
| Transportation | \$32.91 | \$51.51 | \$16.33 | \$45.00 | \$42.25 | \$32.84 | \$44.41 | \$80.67 | \$150.00 |
| Recreation and entertainment | \$74.06 | \$85.28 | \$87.31 | \$15.00 | \$105.63 | \$67.76 | \$95.60 | \$127.22 | \$245.94 |
| Shopping | \$114.51 | \$179.45 | \$109.50 | \$25.00 | \$97.86 | \$104.23 | \$173.70 | \$515.44 | \$166.75 |
| Other/misc. | \$43.65 | \$74.51 | \$78.75 | \$0.00 | \$64.52 | \$29.67 | \$47.67 | \$130.71 | \$119.72 |



VISITOR BY QUARTER

This portion of the study focused on the visitor by quarter, granting an in-depth visitor profile in each part of the calendar year:

- Q1: January through March
- Q2: April through June
- Q3: July through September
- Q4: October through December

Information analyzed for each of these quarters of the year included:

- Demographics
- Booking mode and length of stay
- Size of travel party
- Trip purpose and frequency
- Transportation
- Destination experience
- Spending



OVERALL HIGHLIGHTS, BY QUARTER

- Canadian visitors are highest in Q1 (28%) and Q4 (24%).
- California visitors peak in Q2 and Q3 (accounting for nearly half of all visitors).
- Visitors from other US states peak in Q1 at 40% but still account for roughly a third of all visitors the rest the year.
- Q2 and Q3 visitors are less wealthy and less educated, and stay for shorter periods (4.7 - 5.0 nights).
- Q2 and Q3 visitors are more likely to stay in a hotel or resort (40% and 37%, respectively), while Q2 and Q4 visitors are least likely to rent a vacation home (12% in both quarters).

QUARTER 1

- Visitors from US states other than California peak.

QUARTER 2

- A quarter of visitors stay with family/friends, and hotel/resorts increase to 37%.
- Canadian visitors more likely to make 3-4 trips (35%) or 8+ trips (17%), while international visitors are most likely to make their first trip (70%).

QUARTER 3

- Domestic partnerships increase to 12%.
- Non-convention/conference business trips peak (10%).

QUARTER 4

- Visitors stay primarily at hotels/resorts (29%), with friends/family (20%) or in a timeshare (17%).

DEMOGRAPHICS, BY QUARTER

- Canadian visitors peak in Q1 (28%), followed by Q4 (24%).
- California visitors peak in Q2 and Q3 (accounting for nearly half of all visitors).
- Visitors from other US states peak in Q1 at 40% but still account for roughly a third of all visitors the remainder of the year.
- Non-Canadian international visitors peak in Q3, accounting for one in six visitors (16%).

- Visitors under 55 generally arrive in Q2 and Q3, while those 55+ generally arrive in Q1 and Q4.
- Men outnumber women in Q2 and Q3.
- While two-adult households are the norm for GPS visitors, three-adult households rise to a third in Q2.
- GPS visitors are generally affluent, with 50% of those reporting annual HHI in Q1 and Q4 over 100K; HHI over \$100K drops to 38% in Q2 and Q3.
- Three of four respondents (75%) report being married in Q1, Q2, and Q4, while only 3 of 5 report being married in Q3 when domestic partnerships increase to 12%.
- Q1 and Q4 visitors are more likely to be retirees.

BOOKING MODE AND LENGTH OF STAY, BY QUARTER

- Q1 visitors are significantly more likely to book via the internet (54%).
- Q2 and Q3 visitors most likely to not book travel (day trippers, own second home, etc.).
- Two-thirds of visitors in Q1 and Q4 book 1+ months in advance, versus only half in Q2 and Q3.
- Shorter trips (4 nights or less) are at their highest levels in Q2, while long trips (8+ nights) dominate in Q1 (52%).
- Accommodations vary significantly by quarter:
 - In Q1, half stay at hotel/resorts or rent vacation homes.
 - In Q2, 24% stay with family/friends, and hotel/resorts increase to 37%.
 - In Q3, hotel/ resorts increase to 40%, and vacation home rentals increase significantly over Q2 (to 18%).
 - In Q4, visitors stay primarily at hotels/resorts (29%), with friends/family (20%) or in a timeshare (17%).

SIZE OF TRAVEL PARTY, BY QUARTER

- Two-person travel parties account for the majority of visitors, but the percentages are down significantly in Q2 and Q3.
- Three-fourths of Canadian travel parties are two people in both Q1 and Q4.



TRIP PURPOSE AND FREQUENCY, BY QUARTER

- While most visitors to Greater Palm Springs are on leisure trips, in Q3 non-convention/conference business trips peak (10%).
- Over half of leisure visitors are on a general vacation in Q1; quick leisure trips are most popular in Q2 (40%).
- In Q1, Western US visitors are more likely to visit 5-7 times and 8+ times (11% and 26%, respectively).
- In Q2, Canadian visitors are more likely to make 3-4 trips (35%) or 8+ trips (17%), while international visitors are most likely to make their first trip (70%).
- In Q3, 55-64 year-olds are most likely to take 5-7 trips.
- In Q4, Canadian visitors are significantly more likely to have visited 3-4 times (35%), while Western US visitors are most likely to visit 8+ times (24%).

TRANSPORTATION, BY QUARTER

- While half of visitors to Greater Palm Springs drove in their personal vehicle in all four quarters, two-fifths flew in Q1, Q2 and Q4 (43%, 42%, and 45%, respectively).
- In Q1 and Q2, over three-fifths of visitors who flew to Greater Palm Springs did so via Palm Springs International Airport (PSP); only a third used PSP in Q3.
- In Q3, two-fifths (41%) arrived via Los Angeles International Airport (LAX).
- In Q4, PSP accounted for just over half (52%) of flying visitors, and LAX accounted for 29%.
- Within Greater Palm Springs, personal cars dominate in Q1 and Q2, while in Q3 and Q4 rental cars are equally used.



DESTINATION EXPERIENCE, BY QUARTER

- While visitors enjoy Greater Palm Springs for many reasons throughout the year, positive ratings are significantly lower for live entertainment, nightclubs/bars/clubs, cycling and shopping in Q3.
- While consistently highly rated across all time periods, Q2 visitors are the most satisfied.
- In Q2 and Q4, three-quarters of visitors stated they would “definitely” plan a return trip to Greater Palm Springs.
- Overall, most visitors are “very” or “somewhat” likely to recommend visiting Greater Palm Springs to family, friends and associates, producing very high Net Promoter Scores (NPS):
 - Q1: 85
 - Q2: 100
 - Q3: 92
 - Q4: 91

SPENDING, BY QUARTER

- While visitors are consistently most likely to incur expenses dining out, shopping and with recreation and entertainment, they are most likely to go shopping (84%) in Q4.
- Daily spending on dining and retail shopping is highest in Q1 and Q2.
 - Q1 dining: \$124; Q1 shopping: \$124
 - Q2 dining: \$123; Q2 shopping: \$125

SURVEY QUESTIONS

GPS

GPS Visitor by Quarter

Annual Average

Number of Survey Responses

12,069

Q 1
3,521

Q2
3,230

Q 3
1,483

Q4
3,835

DEMOGRAPHICS

RESIDENCY REGION

In which region do you reside?

| | | | | | |
|---------------|-----|-----|-----|-----|-----|
| International | 8% | 5% | 9% | 16% | 7% |
| Canada | 20% | 28% | 13% | 7% | 24% |
| CA | 38% | 27% | 47% | 48% | 35% |
| Other US | 34% | 40% | 31% | 29% | 34% |

RESIDENCY COUNTRY

In which country do you reside?

| | | | | | |
|-----------------------|-----|-----|-----|-----|-----|
| Canada | 71% | 86% | 58% | 30% | 77% |
| United Kingdom | 8% | 4% | 12% | 20% | 7% |
| Germany | 3% | 1% | 5% | 9% | 1% |
| Australia/New Zealand | 3% | 1% | 4% | 7% | 2% |
| Mexico | 3% | 1% | 4% | 7% | 2% |
| China | 3% | 2% | 3% | 7% | 2% |
| France | 2% | 1% | 3% | 6% | 0% |
| Japan | 1% | 1% | 1% | 2% | 1% |
| South America | 1% | 0% | 2% | 2% | 1% |
| Other | 5% | 2% | 7% | 10% | 6% |

RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | | | |
|--------------|-----|-----|-----|-----|-----|
| California | 52% | 41% | 60% | 61% | 51% |
| Washington | 8% | 11% | 6% | 2% | 8% |
| Oregon | 3% | 5% | 2% | 1% | 4% |
| Illinois | 3% | 5% | 2% | 0% | 3% |
| Arizona | 3% | 2% | 3% | 1% | 3% |
| Minnesota | 3% | 5% | 1% | 1% | 2% |
| Colorado | 2% | 2% | 2% | 5% | 2% |
| Nevada | 2% | 1% | 2% | 5% | 2% |
| New York | 2% | 2% | 2% | 2% | 2% |
| Texas | 2% | 2% | 2% | 2% | 2% |
| Michigan | 1% | 2% | 1% | 1% | 1% |
| Florida | 1% | 1% | 1% | 1% | 1% |
| Pennsylvania | 1% | 1% | 1% | 1% | 1% |

SURVEY QUESTIONS

GPS

GPS
Visitor by Quarter

Annual Average

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | Q 1 | Q2 | Q 3 | Q4 |
|----------------------|----|-----|----|-----|----|
| Wisconsin | 1% | 2% | 1% | 0% | 1% |
| Arkansas | 1% | 0% | 0% | 5% | 1% |
| New Jersey | 1% | 1% | 1% | 1% | 1% |
| Ohio | 1% | 1% | 1% | 1% | 1% |
| Utah | 1% | 1% | 1% | 1% | 1% |
| Virginia | 1% | 0% | 1% | 1% | 1% |
| Massachusetts | 1% | 1% | 1% | 0% | 1% |
| Idaho | 1% | 1% | 0% | 1% | 1% |
| Iowa | 1% | 1% | 0% | 0% | 1% |
| New Mexico | 1% | 1% | 0% | 1% | 1% |
| Tennessee | 1% | 1% | 0% | 1% | 0% |
| Georgia | 1% | 1% | 1% | 0% | 1% |
| Connecticut | 0% | 1% | 1% | 0% | 0% |
| Missouri | 0% | 1% | 0% | 0% | 0% |
| Maryland | 0% | 1% | 0% | 0% | 0% |
| Oklahoma | 0% | 0% | 1% | 0% | 0% |
| Alaska | 0% | 0% | 0% | 1% | 0% |
| North Carolina | 0% | 0% | 0% | 0% | 0% |
| Montana | 0% | 1% | 0% | 0% | 0% |
| Kansas | 0% | 1% | 0% | 0% | 0% |
| South Dakota | 0% | 1% | 0% | 0% | 0% |
| Indiana | 0% | 1% | 0% | 0% | 0% |
| District of Columbia | 0% | 0% | 0% | 0% | 1% |
| Nebraska | 0% | 1% | 0% | 0% | 0% |
| South Carolina | 0% | 0% | 0% | 0% | 0% |
| Kentucky | 0% | 0% | 0% | 0% | 0% |
| North Dakota | 0% | 0% | 0% | 0% | 0% |
| Maine | 0% | 0% | 0% | 0% | 0% |
| Louisiana | 0% | 0% | 0% | 0% | 0% |
| Alabama | 0% | 0% | 0% | 0% | 0% |
| Hawaii | 0% | 0% | 0% | 0% | 0% |
| Mississippi | 0% | 0% | 0% | 1% | 0% |
| New Hampshire | 0% | 0% | 0% | 0% | 0% |
| Wyoming | 0% | 0% | 0% | 0% | 0% |
| Vermont | 0% | 0% | 0% | 0% | 0% |

SURVEY QUESTIONS

GPS

GPS Visitor by Quarter

Annual Average

DEMOGRAPHICS

cont. RESIDENCY U.S. STATE

In which U.S. state do you reside?

| | | | | | |
|---------------|----|----|----|----|----|
| Delaware | 0% | 0% | 0% | 0% | 0% |
| Rhode Island | 0% | 0% | 0% | 0% | 0% |
| West Virginia | 0% | 0% | 0% | 0% | 0% |

AGE

Which of the following age categories includes your age?

| | | | | | |
|-------|-----|-----|-----|-----|-----|
| 18-34 | 15% | 8% | 19% | 18% | 12% |
| 35-44 | 15% | 10% | 20% | 20% | 13% |
| 45-54 | 18% | 15% | 23% | 23% | 16% |
| 55-64 | 27% | 30% | 22% | 31% | 28% |
| 65+ | 26% | 37% | 16% | 9% | 32% |

GENDER

What is your gender?

| | | | | | |
|--------|-----|-----|-----|-----|-----|
| Male | 52% | 48% | 53% | 60% | 50% |
| Female | 49% | 52% | 47% | 40% | 50% |

INCOME

Please include the category which best describes your household's approximate annual income.

| | | | | | |
|-------------------|-----|-----|-----|-----|-----|
| <60,000 | 18% | 18% | 17% | 22% | 17% |
| 60,000 - 79,999 | 22% | 22% | 30% | 21% | 15% |
| 80,000 - 99,999 | 14% | 12% | 16% | 18% | 15% |
| 100,000 - 159,999 | 29% | 31% | 26% | 32% | 31% |
| 160,000+ | 16% | 17% | 12% | 7% | 22% |

HOUSEHOLD SIZE

(adults only)

Including yourself, how many people live in your household who are over the age of 18?

| | | | | | |
|----|-----|-----|-----|-----|-----|
| 1 | 20% | 20% | 21% | 0% | 24% |
| 2 | 59% | 61% | 57% | 67% | 52% |
| 3 | 10% | 9% | 11% | 33% | 12% |
| 4+ | 11% | 10% | 11% | 0% | 12% |

SURVEY QUESTIONS

GPS

GPS Visitor by Quarter

Annual Average

DEMOGRAPHICS

HOUSEHOLD SIZE (under 18)

Including yourself, how many people live in your household who are under the age of 18?

| | | | | | |
|----|-----|-----|-----|-----|------|
| 0 | 76% | 79% | 80% | 87% | 100% |
| 1 | 8% | 10% | 0% | 13% | 0% |
| 2 | 8% | 7% | 7% | 0% | 0% |
| 3+ | 8% | 4% | 13% | 0% | 0% |

EDUCATION

What is your highest level of education?

| | | | | | |
|-----------------------|-----|-----|-----|-----|-----|
| Some high school | 0% | 0% | 1% | 0% | 1% |
| Completed high school | 6% | 5% | 4% | 3% | 7% |
| Some college | 18% | 17% | 13% | 16% | 17% |
| Associates degree | 5% | 5% | 4% | 5% | 4% |
| Bachelors degree | 37% | 41% | 41% | 42% | 36% |
| Graduate degree | 27% | 27% | 30% | 29% | 30% |

MARITAL STATUS

What is your marital status?

| | | | | | |
|----------------------|-----|-----|-----|-----|-----|
| Single | 11% | 16% | 7% | 5% | 6% |
| Married | 75% | 70% | 78% | 83% | 81% |
| Divorced | 4% | 3% | 3% | 3% | 2% |
| Domestic partnership | 5% | 7% | 6% | 5% | 4% |
| Widowed | 4% | 3% | 4% | 4% | 6% |

OCCUPATION

Which of the following best describes your occupation?

| | | | | | |
|---------------------------|-----|-----|-----|-----|-----|
| Retired | 39% | 24% | 47% | 41% | 55% |
| Mngment/Bus. Professional | 30% | 40% | 25% | 30% | 26% |
| Mkting/Sales/Office | 10% | 13% | 8% | 9% | 5% |
| Medical | 9% | 12% | 9% | 11% | 7% |
| Gov. Affairs | 6% | 8% | 6% | 6% | 3% |
| Const./Extraction/Maint. | 5% | 4% | 4% | 3% | 3% |

ETHNICITY

What is your ethnic background?

| | | | | | |
|------------------------|-----|-----|-----|-----|-----|
| Caucasian | 83% | 76% | 88% | 87% | 93% |
| Asian | 5% | 8% | 5% | 3% | 1% |
| Multi-racial | 4% | 4% | 4% | 3% | 2% |
| Hispanic/Latino | 4% | 6% | 2% | 3% | 1% |
| Black/African American | 1% | 2% | 1% | 2% | 0% |
| Other | 2% | 2% | 1% | 1% | 1% |

SURVEY QUESTIONS

BOOKING TRAVEL ARRANGEMENTS

BOOKING TRAVEL

How did you book your travel?

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|---|----------------|-----|-----|-----|-----|
| Via the internet | 51% | 54% | 48% | 48% | 51% |
| Did not book travel (stayed w/friends/family) | 22% | 17% | 26% | 30% | 22% |
| Phoned provider directly | 6% | 7% | 6% | 3% | 6% |
| Used a travel agent | 3% | 3% | 3% | 3% | 4% |
| Friend/Spouse | 5% | 0% | 10% | 14% | 2% |
| Other | 0% | 1% | 0% | 0% | 0% |

WHEN TRAVEL BOOKED

How far in advance did you book your travel?

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|-------------------|----------------|-----|-----|-----|-----|
| Decided day of | 6% | 5% | 9% | 7% | 3% |
| Less than 1 week | 10% | 7% | 13% | 13% | 9% |
| 1 - 2 weeks | 11% | 10% | 12% | 10% | 11% |
| 3 - 4 weeks | 13% | 10% | 15% | 20% | 12% |
| more than 1 month | 60% | 68% | 49% | 50% | 65% |

LENGTH OF STAY

How many nights are you staying in Greater Palm Springs during your visit?

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|--------------|----------------|-----|-----|-----|-----|
| 1 - 2 nights | 14% | 9% | 17% | 21% | 14% |
| 3 - 4 nights | 18% | 14% | 21% | 20% | 17% |
| 5-6 nights | 9% | 7% | 10% | 8% | 10% |
| 7 nights | 13% | 11% | 13% | 13% | 14% |
| 8+ nights | 37% | 52% | 24% | 28% | 38% |

ACCOMMODATIONS

What type of accommodations are you staying in while in Greater Palm Springs?

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|----------------------|----------------|-----|-----|-----|-----|
| Hotel/Resort | 31% | 25% | 37% | 40% | 29% |
| Friends/Family | 20% | 19% | 23% | 17% | 20% |
| Vacation home rental | 16% | 24% | 12% | 18% | 12% |
| Timeshare | 14% | 9% | 14% | 13% | 17% |
| 2nd home | 12% | 12% | 11% | 9% | 15% |
| RV Park | 4% | 5% | 1% | 3% | 5% |
| Other | 3% | 5% | 3% | 1% | 2% |

TRAVEL PARTY SIZE

Including yourself, how many people traveled in your immediate party with you on this trip to Greater Palm Springs?

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|----|----------------|-----|-----|-----|-----|
| 1 | 13% | 14% | 16% | 12% | 10% |
| 2 | 58% | 66% | 53% | 42% | 62% |
| 3 | 10% | 7% | 11% | 13% | 9% |
| 4 | 12% | 8% | 14% | 22% | 11% |
| 5 | 4% | 2% | 3% | 9% | 4% |
| 6+ | 4% | 3% | 3% | 3% | 5% |

GPS

Annual Average

GPS Visitor by Quarter

Q1 Q2 Q3 Q4

SURVEY QUESTIONS

TRIP PURPOSE

TRAVEL PURPOSE

Is the primary purpose of your travel for business or leisure?

| | GPS Annual Average | Q1 | Q2 | Q3 | Q4 | Hotel | Timeshare | Vacation Rental | 2 nd Home |
|-------------------------------------|-----------------------|-----|-----|-----|-----|-------|-----------|--------------------|-------------------------|
| Leisure | 93% | 94% | 94% | 87% | 95% | 89% | 93% | 96% | 96% |
| Business - other | 4% | 3% | 4% | 10% | 3% | 5% | 5% | 3% | 3% |
| Business - convention or conference | 3% | 3% | 3% | 3% | 2% | 5% | 3% | 1% | 1% |

TYPE OF LEISURE TRAVEL-

Which of the following best describes your leisure trip?

| | | | | | | | | | |
|----------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| General vacation | 43% | 54% | 33% | 38% | 43% | 37% | 66% | 59% | 57% |
| Quick leisure trip | 29% | 23% | 40% | 30% | 25% | 37% | 10% | 20% | 15% |
| Visiting friends/relatives | 10% | 9% | 10% | 8% | 10% | 4% | 4% | 4% | 2% |
| Golf/Hike/Recreation | 7% | 5% | 6% | 9% | 8% | 6% | 9% | 8% | 14% |
| Special Event/Festival | 5% | 5% | 5% | 6% | 6% | 7% | 5% | 4% | 2% |
| Romantic trip | 3% | 2% | 2% | 3% | 4% | 6% | 1% | 3% | 1% |
| Other | 3% | 2% | 1% | 4% | 4% | 1% | 2% | 1% | 7% |

FREQUENCY OF LEISURE TRAVEL

How many times have you been to Greater Palm Springs for leisure purposes in the last 3 years?

| | | | | | | | | | |
|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| First trip | 29% | 26% | 32% | 33% | 27% | 43% | 28% | 29% | 2% |
| 2 trips | 16% | 17% | 15% | 13% | 17% | 17% | 19% | 20% | 3% |
| 3 - 4 trips | 28% | 28% | 26% | 33% | 27% | 21% | 33% | 30% | 37% |
| 5 - 7 trips | 9% | 7% | 8% | 9% | 11% | 7% | 8% | 9% | 12% |
| 8+ trips | 17% | 20% | 18% | 10% | 16% | 10% | 11% | 11% | 44% |
| Business trip only | 1% | 1% | 1% | 1% | 1% | 2% | 1% | 0% | 0% |

TRANSPORTATION

TRANSPORTATION TO GPS

What was your primary method of travel to Greater Palm Springs?

| | | | | | | | | | |
|-------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Personal vehicle | 53% | 51% | 56% | 61% | 50% | 55% | 41% | 49% | 56% |
| Air | 42% | 43% | 42% | 35% | 45% | 43% | 58% | 51% | 43% |
| RV | 3% | 4% | 1% | 2% | 4% | 0% | 0% | 0% | 1% |
| Charter bus/motor coach | 1% | 1% | 1% | 0% | 0% | 1% | 0% | 0% | 0% |
| Train | 0% | 0% | 0% | 2% | 0% | 0% | 1% | 0% | 0% |
| Scheduled bus | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Other | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

What airport did you fly into?

| | | | | | | | | | |
|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Palm Springs | 60% | 72% | 63% | 37% | 52% | 50% | 61% | 59% | 87% |
| Los Angeles | 23% | 13% | 22% | 41% | 29% | 29% | 27% | 20% | 9% |
| Ontario | 8% | 9% | 8% | 7% | 7% | 7% | 6% | 10% | 3% |
| San Diego | 4% | 2% | 3% | 10% | 5% | 6% | 4% | 5% | 1% |
| Santa Ana | 1% | 2% | 1% | 1% | 1% | 1% | 1% | 1% | 0% |

SURVEY QUESTIONS

cont. TRIP PURPOSE

TRANSPORTATION IN GPS

What was your primary means of transportation while in GPS?

| | GPS Annual Average | GPS Visitor by Quarter | | | |
|--------------|-----------------------|---------------------------|-----|-----|-----|
| | | Q1 | Q2 | Q3 | Q4 |
| Personal car | 57% | 59% | 66% | 43% | 52% |
| Rental car | 37% | 34% | 30% | 48% | 41% |
| Walk | 3% | 3% | 0% | 0% | 4% |
| Taxi | 1% | 1% | 1% | 0% | 1% |
| Other | 3% | 3% | 3% | 9% | 2% |

DESTINATION EXPERIENCE

ASPECTS OF TRIP

Percent of people who rated aspects of their trip excellent or very good.

| | | | | | |
|-------------------------------------|-----|-----|-----|-----|-----|
| Satisfaction of your accommodations | 87% | 86% | 93% | 91% | 87% |
| Service provided by accommodations | 86% | 86% | 92% | 83% | 84% |
| Quality of service received | 91% | 90% | 96% | 87% | 90% |
| Overall destination value | 91% | 90% | 96% | 96% | 90% |
| Overall destination satisfaction | 94% | 93% | 99% | 96% | 95% |

DESTINATION FEATURES

Percent of people who rated destination features excellent or very good.

| | | | | | |
|---|-----|-----|-----|-----|-----|
| Accommodations | 93% | 92% | 93% | 91% | 94% |
| Spas | 93% | 94% | 91% | 93% | 93% |
| Shopping | 92% | 94% | 93% | 85% | 93% |
| Live entertainment | 86% | 93% | 86% | 67% | 89% |
| Museums | 95% | 96% | 96% | 92% | 96% |
| Dining | 95% | 96% | 96% | 90% | 94% |
| Nightlife | 85% | 90% | 82% | 76% | 88% |
| Recreation sports facilities (golf, tennis) | 97% | 97% | 0% | 0% | 98% |
| Outdoor recreation (hiking, jeep tours) | 97% | 96% | 0% | 0% | 97% |
| Palm Springs Aerial Tramway | 96% | 94% | 96% | 99% | 97% |
| National parks/Monuments | 95% | 95% | 94% | 89% | 96% |
| Golf courses | 98% | 99% | 98% | 98% | 99% |
| Tennis facilities | 96% | 98% | 97% | 92% | 97% |
| Cycling | 88% | 88% | 92% | 76% | 97% |
| Hiking | 95% | 97% | 95% | 92% | 97% |
| Casinos | 93% | 86% | 91% | 98% | 97% |
| The Living Desert | 96% | 96% | 96% | 96% | 97% |

SURVEY QUESTIONS

DESTINATION EXPERIENCE

RETURNING TO GREATER PALM SPRINGS

Are you planning on returning to Greater Palm Springs for leisure purposes?

| | GPS Annual Average | Q1 | Q2 | Q3 | Q4 |
|----------------|-----------------------|-----|-----|-----|-----|
| Definitely | 68% | 63% | 77% | 48% | 74% |
| Likely | 21% | 25% | 15% | 35% | 16% |
| Possible | 9% | 10% | 5% | 17% | 10% |
| Unlikely | 1% | 1% | 3% | 0% | 1% |
| Definitely not | 1% | 1% | 0% | 0% | 0% |

ACTUAL VERSUS ANTICIPATED EXPERIENCE

Please rate your actual experience in Greater Palm Springs compared to what you anticipated your experience would be.

| | GPS Annual Average | Q1 | Q2 | Q3 | Q4 |
|--------------------|-----------------------|-----|-----|-----|-----|
| Much better | 30% | 28% | 36% | 35% | 31% |
| Somewhat better | 29% | 30% | 32% | 26% | 26% |
| Equals Anticipated | 38% | 38% | 30% | 30% | 40% |
| Somewhat worse | 3% | 3% | 0% | 0% | 3% |
| Much worse | 1% | 1% | 0% | 0% | 1% |

RECOMMENDATIONS TO FAMILY AND FRIENDS

How likely would you be to recommend visiting Greater Palm Springs to family, friends or associates?

| | GPS Annual Average | Q1 | Q2 | Q3 | Q4 |
|----------------------------|-----------------------|-----|-----|-----|-----|
| Very unlikely | 3% | 4% | 0% | 4% | 3% |
| Somewhat unlikely | 1% | 1% | 0% | 0% | 1% |
| Neither likely or unlikely | 2% | 3% | 0% | 0% | 2% |
| Somewhat likely | 17% | 20% | 7% | 35% | 13% |
| Very likely | 77% | 71% | 93% | 61% | 82% |

PERCEPTION OF DESTINATION

Based on your experience in Greater Palm Springs during this visit, what was your overall perception of the destination?

| | GPS Annual Average | Q1 | Q2 | Q3 | Q4 |
|-------------------|-----------------------|-----|-----|-----|-----|
| Very positive | 85% | 83% | 88% | 74% | 87% |
| Somewhat positive | 13% | 13% | 12% | 26% | 10% |
| Neutral | 2% | 2% | 0% | 0% | 2% |
| Somewhat negative | 1% | 1% | 0% | 0% | 1% |
| Very negative | 1% | 1% | 0% | 0% | 0% |

SURVEY QUESTIONS

DESTINATION EXPERIENCE

EXPENSES

Which of the following categories did your personal travel party incur expenses while in the destination?

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|------------------------------|----------------|-----|-----|-----|-----|
| Dining out | 95% | 95% | 95% | 91% | 96% |
| Retail shopping | 77% | 75% | 67% | 70% | 84% |
| Recreation and entertainment | 72% | 73% | 75% | 74% | 69% |
| Other | 51% | 51% | 45% | 39% | 52% |
| Local transportation | 44% | 44% | 44% | 48% | 44% |
| None of the above | 2% | 3% | 3% | 0% | 2% |

DAILY SPENDING

Please indicate your personal travel party's average daily spend while in Greater Palm Springs during your trip.

| | Annual Average | Q1 | Q2 | Q3 | Q4 |
|------------------------------|----------------|----------|----------|---------|----------|
| Dining | \$121.41 | \$124.45 | \$122.57 | \$99.76 | \$118.67 |
| Transportation | \$32.91 | \$37.75 | \$33.79 | \$53.09 | \$25.54 |
| Recreation and entertainment | \$74.06 | \$89.12 | \$77.47 | \$64.35 | \$52.73 |
| Shopping | \$114.51 | \$124.16 | \$124.50 | \$94.81 | \$99.72 |
| Other/misc. | \$43.65 | \$47.21 | \$87.73 | \$45.00 | \$29.99 |



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