

ATTACHMENT #3

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Economic Impact of the Living Desert Zoo and Gardens

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Section 1

RESEARCH OVERVIEW

Introduction

The Living Desert Zoo and Gardens (“Zoo”) is a nonprofit, accredited member of the Association of Zoos and Aquariums. The Zoo has been a top attraction in the Palm Springs area for more than 50 years – welcoming 616,900 visitors in the most recent fiscal year (FY 22/23) – and serves as an important economic anchor in Greater Palm Springs.


The Zoo is currently in a three-phase capital improvement project that includes new animal habitat space, a state-of-the-art event center, and new ways for guests to observe, interact with and learn about desert species. In 2021, the Zoo opened a new four-acre Rhino Savanna and is currently developing a lion’s exhibit.

The Living Desert Zoo and Gardens’ annual operations, along with spending by Zoo patrons at local, off-site establishments and businesses, generates significant economic and fiscal (tax) impacts in Riverside County. This study analyzes the impacts attributable to the annual operations of the Living Desert Zoo and Gardens for FY 18/19 through FY 22/23 and for a stabilized year of operations post expansion, as well as the one-time impacts for capital expenditures.

Tourism Economics prepared a comprehensive model to quantify the impacts arising from annual operational spending and capital expenditures at the Living Desert Zoo and Gardens, as well as patron spending at off-site establishments throughout the local economy.

Impact modeling is based on an IMPLAN input-output (I-O) model for the Riverside County economy.

The results of this study show the scope of the Living Desert Zoo and Gardens’ impacts in terms of direct operational spending, capital expenditures, and off-site visitor spending, as well as total economic impacts, including total business sales, employment, labor income, and fiscal (tax) impacts.





Section 2

KEY FINDINGS

Summary Findings

The Living Desert Zoo and Gardens generated a total economic impact of \$148.1 million in FY 22/23, excluding capital expenditure impacts.

FY 22/23 Operations & Visitor Spending Impacts: In FY 22/23, the Living Desert Zoo and Gardens generated a total economic impact of \$148.1 million, which included \$54.9 million in total labor income, supported 1,484 part-time and full-time jobs, and generated \$17.9 million in state and local tax revenues.

Stabilized Year Operations & Visitor Spending Impacts: In a stabilized year of operations post expansion, the Living Desert Zoo and Gardens is expected to generate a total economic impact of \$215.1 million, which is expected to include \$83.0 million in total labor income, support 2,150 part-time and full-time jobs, and generate \$25.3 million in state and local tax revenues.

In addition to the annual impacts, the one-time capital expenditure impacts due to Zoo expansion is expected to generate a total economic impact of \$62.8 million.

Living Desert Zoo and Gardens Summary Economic Impacts (\$ millions and number of jobs)

	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	Stabilized Year
Business Sales	\$96.1	\$68.8	\$86.0	\$135.3	\$148.1	\$215.1
Personal Income	\$34.8	\$26.2	\$30.9	\$47.2	\$54.9	\$83.0
Employment	1,007	761	901	1,342	1,484	2,150
Taxes	\$18.1	\$12.3	\$16.2	\$26.6	\$28.8	\$41.3
State & local taxes	\$11.1	\$7.2	\$10.0	\$16.6	\$17.9	\$25.3
Federal taxes	\$7.0	\$5.1	\$6.2	\$9.9	\$10.9	\$15.9

Source: Living Desert Zoo and Gardens, Tourism Economics
Note: Totals may not sum due to rounding.

LIVING DESERT ZOO AND GARDENS IMPACTS

OPERATIONS & VISITOR SPENDING ECONOMIC IMPACTS (FY 22/23)

DIRECT SPENDING (FY 22/23)

The Living Desert Zoo and Gardens generated significant economic impacts as the Zoo spent money in the local economy in the form of annual operational expenditures.

In addition to spending money during their visit to the Zoo, patrons also spent money at businesses and establishments in the local economy during their stay in Greater Palm Springs, including local restaurants, retailers, and recreation/entertainment venues.

In FY 22/23, the Zoo generated \$98.2 million in direct spending in the local economy, as outlined below.



\$98.2 MILLION

Direct Spending Impact of the Zoo (FY 22/23)



\$20.2 MILLION

Zoo Operating Expenditures



\$77.9 MILLION

Off-Site Spending by Zoo Patrons

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' direct spending impact of \$98.2 million generated a total economic impact of \$148.1 million in the local economy, which supported 1,484 part-time and full-time jobs and generated \$17.9 million in state and local taxes in FY 22/23.



\$148.1 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens (FY 22/23)

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS (FY 22/23)



\$148.1M

Total
Economic
Impact



1,484

Total
Jobs
Generated



\$17.9M

Total
State & Local
Tax Revenues

LIVING DESERT ZOO AND GARDENS IMPACTS

OPERATIONS & VISITOR SPENDING ECONOMIC IMPACTS (STABILIZED YEAR)

DIRECT SPENDING (STABILIZED YEAR)

The Living Desert Zoo and Gardens is expected to generate significant economic impacts as the Zoo spends money in the local economy in the form of annual operational expenditures.

In addition to spending money during their visit to the Zoo, patrons also will spend money at businesses and establishments in the local economy during their stay in Greater Palm Springs, including local restaurants, retailers, and recreation/entertainment venues.

In a stabilized year of operations post expansion, the Zoo is expected to generate \$141.9 million in direct spending in the local economy, as outlined below.



\$141.9 MILLION

**Direct Spending Impact of the Zoo
(Stabilized Year)**



\$32.4 MILLION

Zoo Operating Expenditures



\$109.5 MILLION

Off-Site Spending by Zoo Patrons

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' expected direct spending impact of \$141.9 million is expected to generate a total economic impact of \$215.1 million in the local economy, which is expected to support 2,150 part-time and full-time jobs and generate \$25.3 million in state and local taxes in a stabilized year of operations post expansion.



\$215.1 MILLION

**Total Economic Impact of the Living Desert Zoo and Gardens
(Stabilized Year)**

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS (STABILIZED YEAR)



\$215.1M

**Total
Economic
Impact**



2,150

**Total
Jobs
Generated**



\$25.3M

**Total
State & Local
Tax Revenues**

LIVING DESERT ZOO AND GARDENS IMPACTS

ONE-TIME CAPITAL EXPENDITURE IMPACTS

DIRECT SPENDING ONE-TIME IMPACTS

The Living Desert Zoo and Gardens already invested and has plans to further invest in significant capital to expand the Zoo's footprint and operation.

The expansion is expected to cost \$40.9 million.



\$40.9 MILLION

Living Desert Zoo and Gardens Capital Expenditure Direct Spending Impact

ONE-TIME CAPITAL EXPENDITURE ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' capital expenditure direct spending impact of \$40.9 million is expected to generate a total economic impact of \$62.8 million, which is expected to support 509 part-time and full-time jobs and generate \$3.0 million in state and local taxes.



\$62.8 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens Capital Expenditure

ONE-TIME IMPACTS OF THE LIVING DESERT ZOO AND GARDENS CAPITAL EXPENDITURES



\$62.8M

Total Economic Impact



509

Total Jobs Generated



\$3.0M

Total State & Local Tax Revenues



Section 3

DIRECT IMPACTS

Direct Impact Approach

The Living Desert Zoo and Gardens generated an estimated \$98.2 million in direct spending in FY 22/23.

The accompanying table outlines the direct spending impacts attributable to the Living Desert Zoo and Gardens. These direct impacts ultimately serve as the inputs for the economic impact model.

The Living Desert Zoo and Gardens' direct spending is comprised of the following categories:

1. Approximately \$20.2 million in **operating expenditures** in FY 22/23.
2. Approximately \$77.9 million in **off-site spending by non-local patrons** in FY 22/23, including spending at local restaurants, retailers, and recreation/entertainment venues.

Direct spending impacts attributable to the Zoo

(\$ millions)

	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	Stabilized Year
Total annual direct spending	\$63.6	\$45.1	\$57.0	\$89.7	\$98.2	\$141.9
Operating expenditures	\$13.2	\$12.8	\$10.1	\$17.1	\$20.2	\$32.4
Visitor off-site spending	\$50.3	\$32.3	\$46.8	\$72.7	\$77.9	\$109.5

Source: Living Desert Zoo and Gardens, Tourism Economics
Note: Totals may not sum due to rounding.

Zoo Operational Spending

The Living Desert Zoo and Gardens employed 252 part-time and full-time employees and incurred \$20.2 million in operating expenses in FY 22/23.

The Living Desert Zoo and Gardens spent \$20.2 million in operational expenditures in FY 22/23, which included spending on employee salaries and wages, professional fees and contracts, park supplies, repairs and maintenance, marketing, and utilities, among others.

The Living Desert Zoo and Gardens employed a total of 67 part-time and 185 full-time employees that earned a total of \$11.1 million in FY 22/23.

Living Desert Zoo and Gardens operational spending
(\$ millions and number of employees)

	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	Stabilized Year
Operating expenses	\$13.2	\$12.8	\$10.1	\$17.1	\$20.2	\$32.4
Salaries & wages	\$7.0	\$7.3	\$5.7	\$7.7	\$11.1	\$16.1
Employees	194	197	157	211	252	400
Full-time	134	139	127	162	185	307
Part-time	60	58	30	49	67	93

Source: Living Desert Zoo and Gardens

Zoo Visitor Count and Origin

The Living Desert Zoo and Gardens welcomed 616,900 total visitors in FY 22/23 and is expected to welcome 850,000 visitors in a stabilized year of operations post expansion.

In FY 22/23, the Living Desert Zoo and Gardens welcomed 616,900 visitors, which excludes school tours.

Approximately 77% or 473,800 of the 616,900 visitors originated from outside Greater Palm Springs – including 63% that stayed overnight and 14% that visited for the day. These visitors spent money while at the Zoo and at off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation / entertainment venues.

Living Desert Zoo and Gardens visitor count by origin
(number of visitors)

	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	Stabilized Year
Total visitors	508,900	345,500	469,200	634,100	616,900	850,000
Locals	126,200	97,100	116,400	178,800	143,100	225,000
Day-trippers	81,900	49,900	75,900	87,900	84,800	128,700
Overnighters	300,800	198,500	277,000	367,400	389,000	496,300

Source: Living Desert Zoo and Gardens
Note: total patrons excludes school tours.

Zoo Visitor Spending by Industry

The 473,800 visitors that originated from outside Greater Palm Springs spent \$77.9 million at off-site establishments in the local economy in FY 22/23.

In FY 22/23, the 473,800 visitors to the Living Desert Zoo and Gardens spent \$77.9 million at off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation / entertainment venues.

The 850,000 visitors that are expected to go to the Zoo in a stabilized year of operations post expansion are expected to spend \$109.5 million at off-site establishments in the local economy.

Living Desert Zoo and Gardens visitor spending

(\$ millions)

	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	Stabilized Year
Total visitor spending	\$50.3	\$32.3	\$46.8	\$72.7	\$77.9	\$109.5
Lodging	\$17.9	\$10.8	\$15.2	\$30.1	\$32.2	\$45.2
Food & beverage	\$14.5	\$9.6	\$14.2	\$19.0	\$20.5	\$28.8
Entertainment	\$7.0	\$4.6	\$6.9	\$9.2	\$9.9	\$13.9
Retail	\$6.4	\$4.3	\$6.3	\$8.4	\$9.1	\$12.8
Local transportation	\$4.5	\$3.0	\$4.4	\$5.9	\$6.3	\$8.9

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Direct Spending (FY 22/23)

The Living Desert Zoo and Gardens' direct spending impacts of \$98.2 million (including visitor spending and operational spending) was spread across a wide range of sectors within the local economy.

In addition to the \$77.9 million in visitor spending, the Living Desert Zoo and Gardens spent \$20.2 million in operating expenditures. In total, the Zoo generated \$98.2 million in direct spending impact.

The direct spending impact of \$98.2 million in the local economy was spread across a number of industries, including \$32.2 million in lodging expenditures, \$20.5 million in food and beverage expenditures, \$20.2 million in operating expenditures, \$9.9 million in entertainment/recreation spending, \$9.1 million in retail purchases, and \$6.3 million in local transportation.



Source: Tourism Economics



Section 4

ECONOMIC IMPACTS SUMMARY

Economic Impact Approach

The economic impacts of the Living Desert Zoo and Gardens' direct spending were estimated using regional Input-Output (I-O) models based on customized IMPLAN (www.implan.com) models for the Riverside County economy. IMPLAN is recognized as an industry standard in local-level I-O models. An I-O model represents a profile of an economy by measuring the relationships among industries and consumers to track the flow of industry revenue to wages, profits, capital, taxes and suppliers. The supply chain is traced as dollars flow through the economy, representing indirect impacts. The model also calculates the induced impacts of spending. Induced impacts represent benefits to the economy as incomes earned as a result of direct spending are spent in the local economy, generating additional sales, jobs, taxes, and income.

The modeling process begins with aligning the direct expenditure measurements with the related sectors in the model (e.g. hotels, restaurants, retail, and recreation). The model is then run to trace the flow of these expenditures through the economy. In this process, the inter-relationships between consumers and industries generate each level of impact.

IMPLAN calculates three levels of impact – direct, indirect, and induced – for a broad set of indicators. These include the following:

- Business sales (also called gross output)
- Household income (including wages and benefits)
- Employment
- Federal taxes
- State and local taxes



Economic Impact Summary

The Zoo generated a total economic impact of \$148.1 million, which supported 1,484 part-time and full-time jobs and generated \$17.9 million in state and local taxes in FY 22/23.

The accompanying table outlines the economic impacts in Riverside County attributable to the Living Desert Zoo and Gardens in FY 18/19 through FY 22/23 and in a stabilized year of operations post expansion.

Details for FY 22/23, the stabilized year of operations post expansion, and the capital expenditures are provided in the following three sections.

Living Desert Zoo and Gardens economic impact summary (\$ millions and number of employees)

	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	Stabilized Year
Total business sales	\$96.1	\$68.8	\$86.0	\$135.3	\$148.1	\$215.1
Direct business sales	\$63.6	\$45.1	\$57.0	\$89.7	\$98.2	\$141.9
Total personal income	\$34.8	\$26.2	\$30.9	\$47.2	\$54.9	\$83.0
Direct personal income	\$24.4	\$18.4	\$21.7	\$33.2	\$38.5	\$58.4
Total employment	1,007	761	901	1,342	1,484	2,150
Direct employment	719	534	647	963	1,059	1,534
Total taxes	\$18.1	\$12.3	\$16.2	\$26.6	\$28.8	\$41.3
Total state & local taxes	\$11.1	\$7.2	\$10.0	\$16.6	\$17.9	\$25.3
Total federal taxes	\$7.0	\$5.1	\$6.2	\$9.9	\$10.9	\$15.9
Direct taxes	\$13.1	\$8.8	\$11.7	\$19.4	\$21.0	\$30.1
Direct state & local taxes	\$8.3	\$5.3	\$7.4	\$12.5	\$13.4	\$19.0
Direct federal taxes	\$4.9	\$3.5	\$4.3	\$6.9	\$7.6	\$11.1

Source: Tourism Economics

Note: Totals may not sum due to rounding.



Section 5

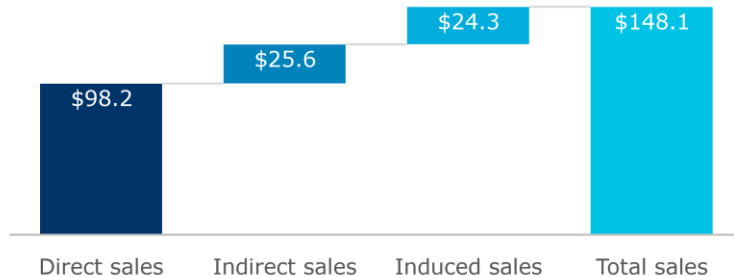
ECONOMIC IMPACTS (FY 22/23)

Business Sales by Industry

The Living Desert Zoo and Gardens' operations and visitor spending generated a total economic impact of **\$148.1 million in FY 22/23.**

The \$98.2 million in Zoo operational spending and off-site spending by visitors generated \$25.6 million in indirect expenditures and \$24.3 million in induced expenditures, resulting in a total economic impact of \$148.1 million in the local economy in FY 22/23.

Business sales impacts by industry, FY 22/23 (\$ millions)



Business sales impacts by industry, FY 22/23 (\$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$98.2	\$25.6	\$24.3	\$148.1
By industry				
Lodging	\$32.3	\$0.0	\$0.0	\$32.3
Food & Beverage	\$20.6	\$1.5	\$2.4	\$24.5
Recreation and Entertainment	\$21.7	\$0.9	\$0.3	\$22.9
Finance, Insurance and Real Estate	\$0.4	\$7.7	\$7.9	\$16.0
Business Services	\$7.1	\$6.9	\$1.7	\$15.8
Retail Trade	\$9.1	\$0.5	\$2.3	\$11.8
Other Transport	\$3.5	\$1.6	\$0.6	\$5.6
Education and Health Care		\$0.1	\$3.8	\$3.9
Gasoline Stations	\$2.6	\$0.0	\$0.2	\$2.8
Wholesale Trade		\$1.3	\$1.2	\$2.5
Personal Services		\$0.8	\$1.6	\$2.4
Government		\$1.5	\$0.9	\$2.4
Construction and Utilities	\$0.8	\$1.0	\$0.5	\$2.3
Communications		\$1.4	\$0.7	\$2.1
Manufacturing		\$0.4	\$0.1	\$0.5
Air Transport		\$0.0	\$0.0	\$0.1
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.0

Source: Tourism Economics

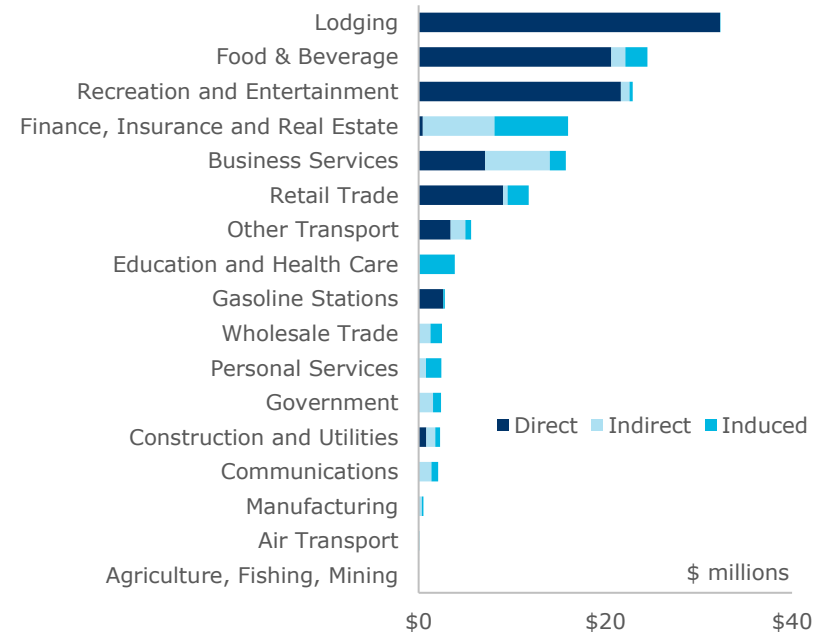
Note: Totals many not sum due to rounding.

Business Sales by Industry

The Living Desert Zoo and Gardens' operations and visitor spending generated a total economic impact of \$148.1 million in FY 22/23.

The lodging industry was the most impacted industry with \$32.3 million in total output in FY 22/23. The food & beverage industry and recreation and entertainment industry followed with \$24.5 million and \$22.9 million in total business sales, respectively.

Business sales impacts by industry, FY 22/23
(\$ millions)



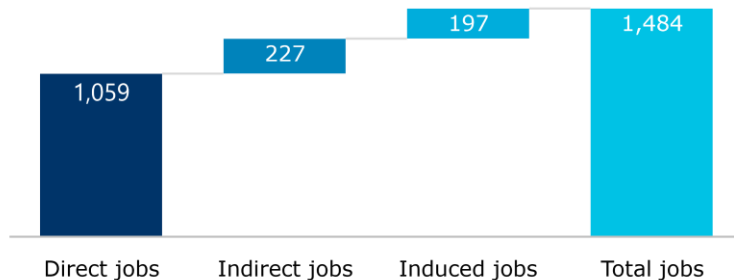
Source: Tourism Economics

Employment by Industry

The Living Desert Zoo and Gardens' operations and visitor spending generated a total employment impact of 1,484 part-time and full-time jobs in FY 22/23.

The Zoo operations and visitor spending directly supported 1,059 full-time and part-time jobs. Indirect and induced impacts generated 227 indirect jobs and 197 induced jobs.

Employment impacts by industry, FY 22/23 (part-time and full-time jobs)



Employment impacts by industry, FY 22/23 (part-time and full-time jobs)

	Direct Employment	Indirect Employment	Induced Employment	Total Employment
Total, all industries	1,059	227	197	1,484
By industry				
Recreation and Entertainment	322	15	6	343
Lodging	313	0	0	313
Food & Beverage	254	23	34	311
Business Services	61	82	19	162
Other Transport	61	20	9	90
Retail Trade	38	5	27	71
Finance, Insurance and Real Estate	2	49	18	69
Education and Health Care		2	44	45
Personal Services		10	25	36
Construction and Utilities	6	4	2	12
Government		8	4	12
Wholesale Trade		5	4	9
Communications		3	2	5
Gasoline Stations	2	0	1	3
Manufacturing		1	0	2
Agriculture, Fishing, Mining		0	0	0
Air Transport		0	0	0

Source: Tourism Economics

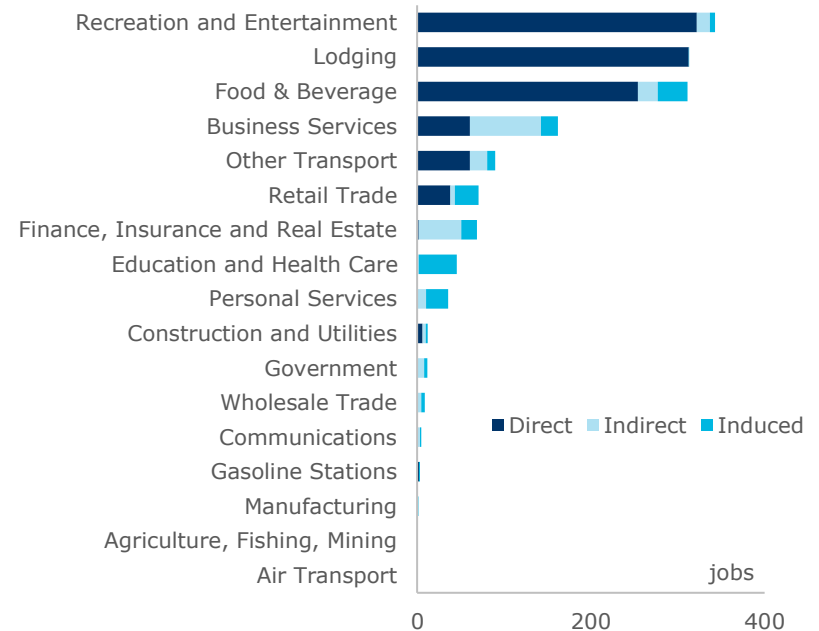
Note: Totals many not sum due to rounding.

Employment by Industry

The Living Desert Zoo and Gardens' operations and visitor spending generated a total employment impact of 1,484 part-time and full-time jobs in FY 22/23.

The recreation and entertainment ranked first with 343 total jobs in FY 22/23. The lodging industry sector followed with 313 total jobs.

Employment impacts by industry, FY 22/23
(part-time and full-time jobs)



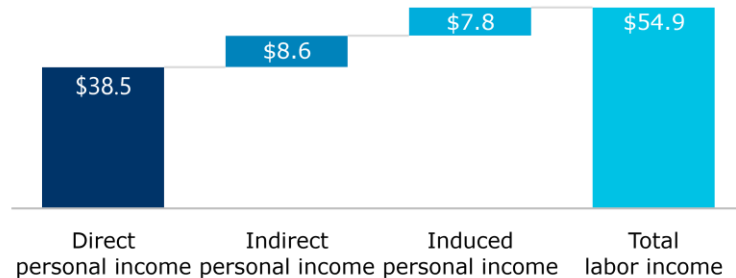
Source: Tourism Economics

Labor Income by Industry

The Living Desert Zoo and Gardens' operations and visitor spending generated \$54.9 million in total labor income in FY 22/23.

The Zoo generated \$38.5 million in direct personal income, \$8.6 million in indirect labor income, and \$7.8 million in induced personal income, resulting in \$54.9 million in total labor income in FY 22/23.

Labor income impacts by industry, FY 22/23 (\$ millions)



Labor income impacts by industry, FY 22/23 (\$ millions)

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$38.5	\$8.6	\$7.8	\$54.9
By industry				
Lodging	\$13.4	\$0.0	\$0.0	\$13.4
Recreation and Entertainment	\$12.2	\$0.3	\$0.1	\$12.6
Food & Beverage	\$7.3	\$0.7	\$1.0	\$9.0
Business Services	\$2.4	\$3.2	\$0.8	\$6.4
Other Transport	\$1.6	\$0.8	\$0.3	\$2.7
Education and Health Care		\$0.0	\$2.2	\$2.2
Retail Trade	\$1.1	\$0.2	\$0.8	\$2.1
Finance, Insurance and Real Estate	\$0.1	\$1.1	\$0.5	\$1.7
Personal Services		\$0.6	\$1.1	\$1.6
Government		\$0.7	\$0.3	\$1.1
Construction and Utilities	\$0.3	\$0.2	\$0.1	\$0.7
Wholesale Trade		\$0.3	\$0.3	\$0.7
Communications		\$0.3	\$0.1	\$0.4
Gasoline Stations	\$0.1	\$0.0	\$0.1	\$0.2
Manufacturing		\$0.1	\$0.0	\$0.1
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.0
Air Transport		\$0.0	\$0.0	\$0.0

Source: Tourism Economics

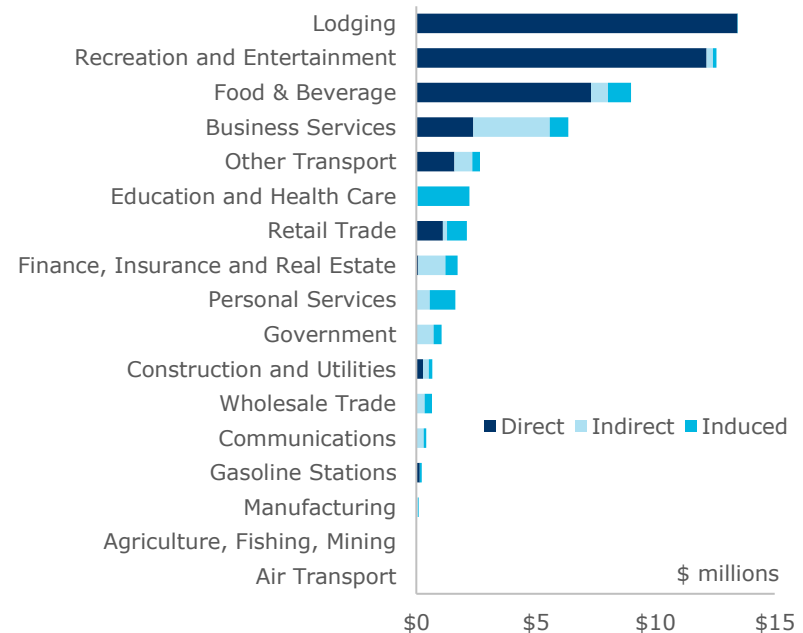
Note: Totals may not sum due to rounding.

Labor Income by Industry

The Living Desert Zoo and Gardens' operations and visitor spending generated \$54.9 million in total labor income in FY 22/23.

In FY 22/23, the lodging industry was the most impacted industry with \$13.4 million in total labor income. The recreation and entertainment industry followed with \$12.6 million in total labor income, including \$12.2 million in direct labor income and \$0.4 million in indirect and induced labor income.

Labor income impacts by industry, FY 22/23
(\$ millions)



Source: Tourism Economics

Tax Generation

The Living Desert Zoo and Gardens' operations and visitor spending generated \$28.8 million in governmental revenue in FY 22/23.

The Zoo's operations and visitor spending generated a total fiscal (tax) impact of \$28.8 million in FY 22/23.

The State of California government collected \$9.6 million, and the local government collected \$8.3 million as a result of the Living Desert Zoo and Gardens.

State and local tax revenue, FY 22/23 (\$ millions)

	State	Local	Total
Total taxes	\$9.6	\$8.3	\$17.9
Sales	\$7.0	\$1.5	\$8.5
Bed Tax	\$0.1	\$4.2	\$4.3
Personal Income	\$1.6	\$0.0	\$1.6
Corporate	\$0.3	\$0.0	\$0.3
Social Insurance	\$0.2	\$0.0	\$0.2
Excise and Fees	\$0.3	\$0.4	\$0.7
Property	\$0.1	\$2.2	\$2.3

Total tax revenue, FY 22/23 (\$ millions)

	Direct	Indirect / Induced	Total
Total Tax Revenues	\$21.0	\$7.8	\$28.8
Federal	\$7.6	\$3.3	\$10.9
Personal Income	\$2.8	\$1.3	\$4.1
Corporate	\$0.4	\$0.3	\$0.6
Indirect Business	\$0.3	\$0.2	\$0.5
Social Insurance	\$4.1	\$1.6	\$5.7
State and Local	\$13.4	\$4.5	\$17.9
Sales	\$5.7	\$2.8	\$8.5
Bed Tax	\$4.3	\$0.0	\$4.3
Personal Income	\$1.1	\$0.5	\$1.6
Corporate	\$0.2	\$0.1	\$0.3
Social Insurance	\$0.2	\$0.1	\$0.2
Excise and Fees	\$0.5	\$0.3	\$0.7
Property	\$1.6	\$0.7	\$2.3

Source: Tourism Economics



Section 6

ECONOMIC IMPACTS (STABILIZED YEAR)

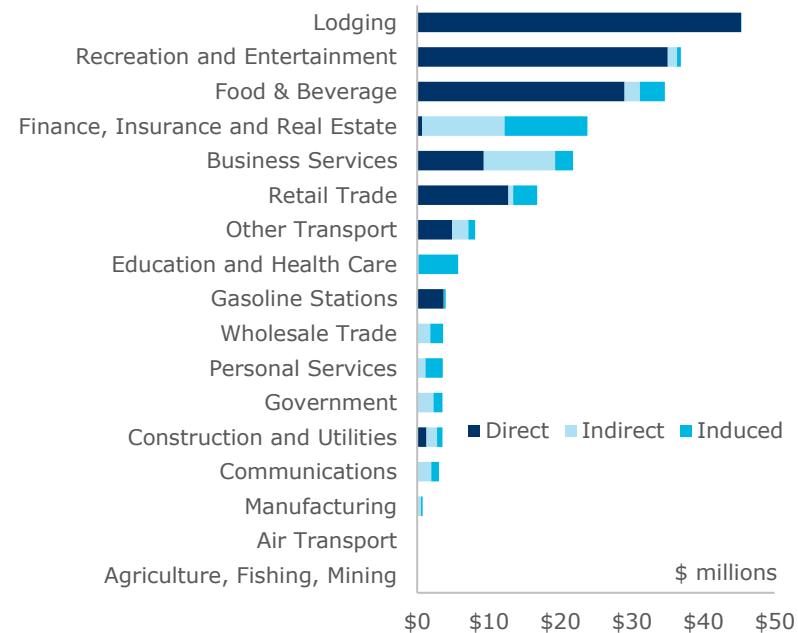
Business Sales by Industry

Business sales impacts by industry, stabilized year
(\$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$141.9	\$37.4	\$35.8	\$215.1
By industry				
Lodging	\$45.3	\$0.0	\$0.0	\$45.3
Recreation and Entertainment	\$35.0	\$1.3	\$0.5	\$36.8
Food & Beverage	\$29.0	\$2.1	\$3.5	\$34.6
Finance, Insurance and Real Estate	\$0.7	\$11.5	\$11.6	\$23.8
Business Services	\$9.3	\$9.9	\$2.5	\$21.8
Retail Trade	\$12.8	\$0.7	\$3.3	\$16.8
Other Transport	\$4.9	\$2.3	\$0.9	\$8.1
Education and Health Care		\$0.2	\$5.6	\$5.7
Gasoline Stations	\$3.7	\$0.0	\$0.2	\$4.0
Wholesale Trade		\$1.9	\$1.8	\$3.6
Personal Services		\$1.2	\$2.4	\$3.6
Government		\$2.3	\$1.3	\$3.5
Construction and Utilities	\$1.3	\$1.4	\$0.8	\$3.5
Communications		\$2.0	\$1.1	\$3.0
Manufacturing		\$0.5	\$0.2	\$0.8
Air Transport		\$0.0	\$0.1	\$0.1
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.1

Source: Tourism Economics

Business sales impacts by industry, stabilized year
(\$ millions)



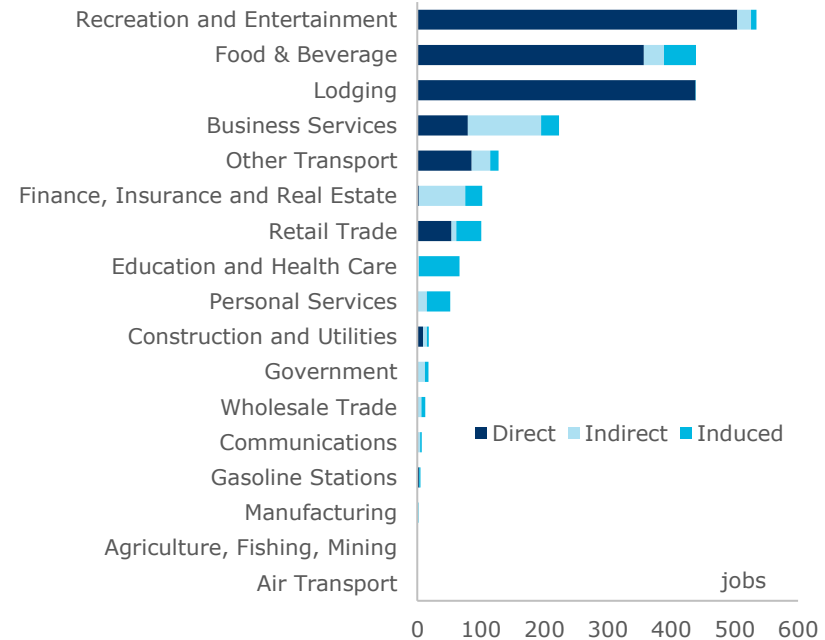
Source: Tourism Economics

Employment by Industry

Employment impacts by industry, stabilized year
(part-time and full-time jobs)

	Direct Employment	Indirect Employment	Induced Employment	Total Employment
Total, all industries	1,534	327	289	2,150
By industry				
Recreation and Entertainment	504	21	9	535
Food & Beverage	357	32	51	439
Lodging	439	0	0	439
Business Services	79	116	28	223
Other Transport	85	29	13	128
Finance, Insurance and Real Estate	3	73	26	102
Retail Trade	54	7	40	101
Education and Health Care		2	64	67
Personal Services		15	37	52
Construction and Utilities	9	6	3	18
Government		12	5	17
Wholesale Trade		7	6	13
Communications		4	3	7
Gasoline Stations	3	0	2	5
Manufacturing		2	1	3
Agriculture, Fishing, Mining		0	0	1
Air Transport		0	0	0

Employment impacts by industry, stabilized year
(part-time and full-time jobs)



Source: Tourism Economics

Source: Tourism Economics

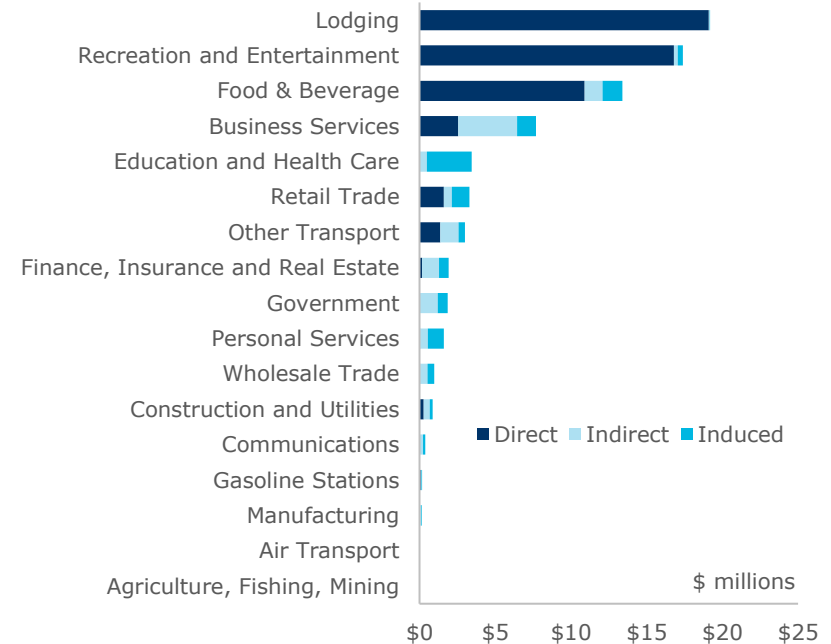
Labor Income by Industry

Labor income impacts by industry, stabilized year
(\$ millions)

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$58.4	\$12.8	\$11.8	\$83.0
By industry				
Lodging	\$21.0	\$0.1	\$0.0	\$21.1
Recreation and Entertainment	\$18.6	\$0.3	\$0.4	\$19.2
Food & Beverage	\$12.0	\$1.3	\$1.5	\$14.7
Business Services	\$2.8	\$4.3	\$1.4	\$8.5
Education and Health Care	\$0.0	\$0.5	\$3.3	\$3.8
Retail Trade	\$1.8	\$0.6	\$1.3	\$3.6
Other Transport	\$1.5	\$1.3	\$0.5	\$3.3
Finance, Insurance and Real Estate	\$0.2	\$1.2	\$0.7	\$2.1
Government		\$1.3	\$0.7	\$2.0
Personal Services	\$0.1	\$0.5	\$1.2	\$1.8
Wholesale Trade	\$0.1	\$0.5	\$0.5	\$1.1
Construction and Utilities	\$0.3	\$0.4	\$0.2	\$0.9
Communications	\$0.0	\$0.3	\$0.2	\$0.4
Gasoline Stations	\$0.1	\$0.0	\$0.1	\$0.2
Manufacturing		\$0.1	\$0.0	\$0.1
Air Transport		\$0.0	\$0.0	\$0.0
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.0

Source: Tourism Economics

Labor income impacts by industry, stabilized year
(\$ millions)



Source: Tourism Economics

Tax Generation

Total tax revenue, stabilized year

(\$ millions)

	Direct	Indirect / Induced	Total
Total Tax Revenues	\$30.1	\$11.1	\$41.3
Federal	\$11.1	\$4.8	\$15.9
Personal Income	\$4.2	\$1.8	\$6.0
Corporate	\$0.5	\$0.4	\$0.9
Indirect Business	\$0.4	\$0.2	\$0.6
Social Insurance	\$6.0	\$2.3	\$8.4
State and Local	\$19.0	\$6.3	\$25.3
Sales	\$8.0	\$4.0	\$12.0
Bed Tax	\$6.0	\$0.0	\$6.0
Personal Income	\$1.6	\$0.7	\$2.3
Corporate	\$0.2	\$0.2	\$0.4
Social Insurance	\$0.3	\$0.0	\$0.4
Excise and Fees	\$0.7	\$0.4	\$1.0
Property	\$2.3	\$1.0	\$3.2

State and local tax revenue, stabilized year

(\$ millions)

	State	Local	Total
Total taxes	\$13.7	\$11.6	\$25.3
Sales	\$9.9	\$2.1	\$12.0
Bed Tax	\$0.1	\$5.9	\$6.0
Personal Income	\$2.3	\$0.0	\$2.3
Corporate	\$0.4	\$0.0	\$0.4
Social Insurance	\$0.4	\$0.0	\$0.4
Excise and Fees	\$0.5	\$0.6	\$1.0
Property	\$0.2	\$3.1	\$3.2

Source: Tourism Economics



Section 7

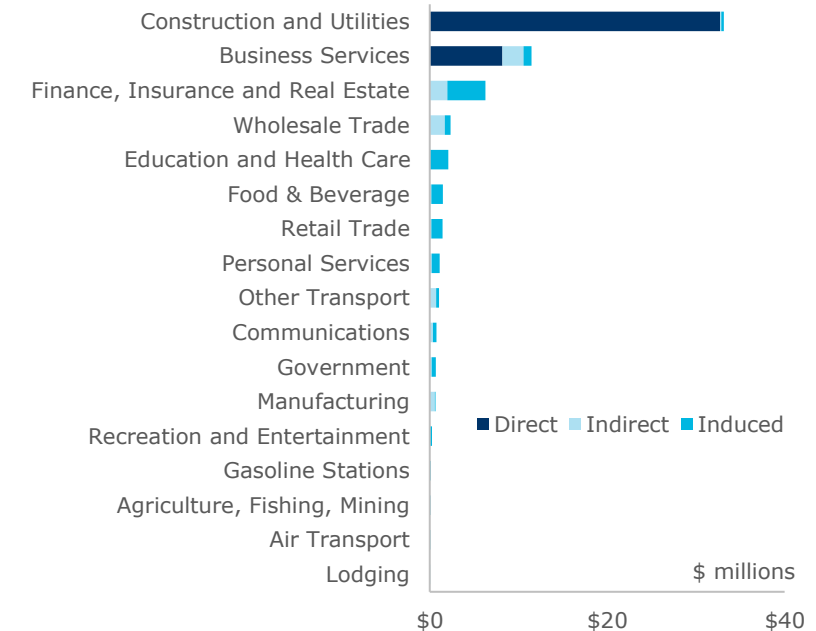
CAPITAL EXPENDITURE IMPACTS

Business Sales by Industry

Business sales impacts by industry, capital expenditures
(\$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$40.9	\$8.6	\$13.3	\$62.8
By industry				
Construction and Utilities	\$32.7	\$0.1	\$0.3	\$33.1
Business Services	\$8.2	\$2.4	\$0.9	\$11.5
Finance, Insurance and Real Estate		\$2.0	\$4.3	\$6.3
Wholesale Trade		\$1.7	\$0.7	\$2.3
Education and Health Care		\$0.0	\$2.1	\$2.1
Food & Beverage		\$0.2	\$1.3	\$1.5
Retail Trade		\$0.2	\$1.2	\$1.4
Personal Services		\$0.2	\$0.9	\$1.1
Other Transport		\$0.7	\$0.3	\$1.0
Communications		\$0.3	\$0.4	\$0.7
Government		\$0.2	\$0.5	\$0.7
Manufacturing		\$0.6	\$0.1	\$0.6
Recreation and Entertainment		\$0.0	\$0.2	\$0.2
Gasoline Stations		\$0.0	\$0.1	\$0.1
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.1
Air Transport		\$0.0	\$0.0	\$0.0
Lodging		\$0.0	\$0.0	\$0.0

Business sales impacts by industry, capital expenditures
(\$ millions)



Source: Tourism Economics

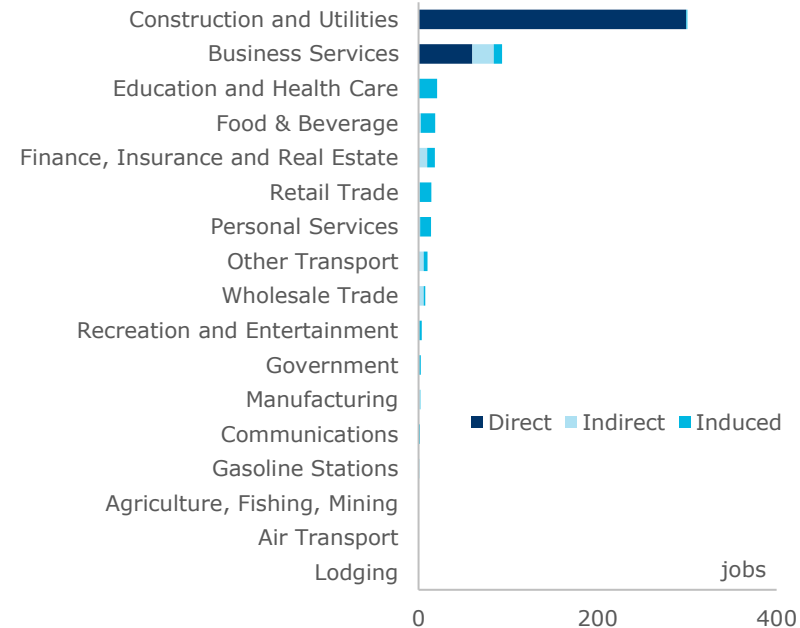
Source: Tourism Economics

Employment by Industry

Employment impacts by industry, capital expenditures
(part-time and full-time jobs)

	Direct Employment	Indirect Employment	Induced Employment	Total Employment
Total, all industries	359	56	94	509
By industry				
Construction and Utilities	299	0	1	300
Business Services	60	24	9	93
Education and Health Care		0	21	21
Food & Beverage		2	16	19
Finance, Insurance and Real Estate		10	9	18
Retail Trade		1	13	14
Personal Services		2	12	14
Other Transport		6	4	10
Wholesale Trade		6	2	8
Recreation and Entertainment		1	3	4
Government		1	2	3
Manufacturing		2	0	2
Communications		1	1	1
Gasoline Stations		0	1	1
Agriculture, Fishing, Mining		0	0	0
Air Transport		0	0	0
Lodging		0	0	0

Employment impacts by industry, capital expenditures
(part-time and full-time jobs)



Source: Tourism Economics

Source: Tourism Economics

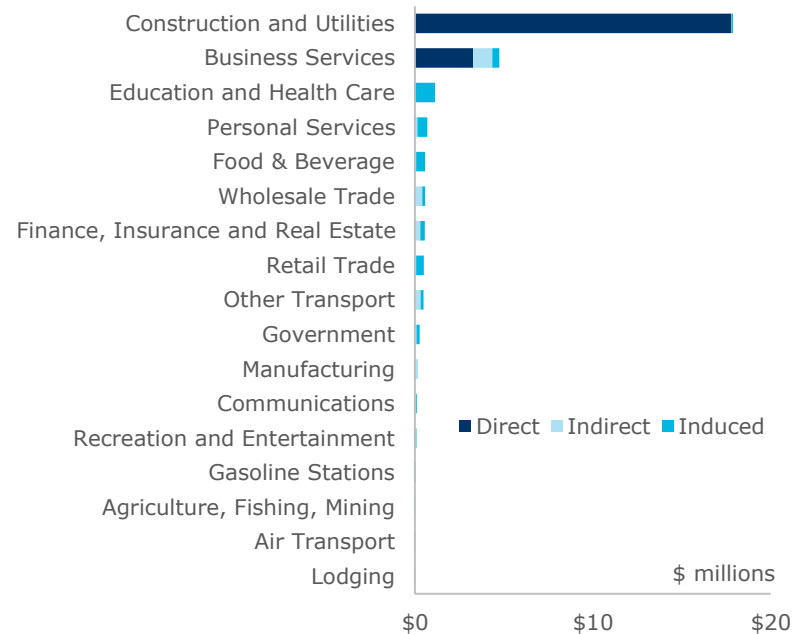
Labor Income by Industry

Labor income impacts by industry, capital expenditures
(\$ millions)

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$21.0	\$2.7	\$4.0	\$27.7
By industry				
Construction and Utilities	\$17.8	\$0.0	\$0.1	\$17.9
Business Services	\$3.3	\$1.1	\$0.4	\$4.7
Education and Health Care		\$0.0	\$1.1	\$1.1
Personal Services		\$0.1	\$0.6	\$0.7
Food & Beverage		\$0.1	\$0.5	\$0.6
Wholesale Trade		\$0.4	\$0.2	\$0.6
Finance, Insurance and Real Estate		\$0.3	\$0.3	\$0.6
Retail Trade		\$0.1	\$0.4	\$0.5
Other Transport		\$0.3	\$0.2	\$0.5
Government		\$0.1	\$0.2	\$0.3
Manufacturing		\$0.1	\$0.0	\$0.1
Communications		\$0.1	\$0.1	\$0.1
Recreation and Entertainment		\$0.0	\$0.1	\$0.1
Gasoline Stations		\$0.0	\$0.0	\$0.0
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.0
Air Transport		\$0.0	\$0.0	\$0.0
Lodging		\$0.0	\$0.0	\$0.0

Source: Tourism Economics

Labor income impacts by industry, capital expenditures
(\$ millions)



Source: Tourism Economics

Tax Generation

Total tax revenue, capital expenditures

(\$ millions)

	Direct	Indirect / Induced	Total
Total Tax Revenues	\$5.3	\$3.1	\$8.4
Federal	\$4.0	\$1.5	\$5.4
Personal Income	\$1.8	\$0.5	\$2.3
Corporate	\$0.0	\$0.1	\$0.2
Indirect Business	\$0.0	\$0.1	\$0.1
Social Insurance	\$2.1	\$0.7	\$2.8
State and Local	\$1.3	\$1.7	\$3.0
Sales	\$0.3	\$0.7	\$1.0
Personal Income	\$0.7	\$0.2	\$0.9
Corporate	\$0.0	\$0.1	\$0.1
Social Insurance	\$0.1	\$0.0	\$0.1
Excise and Fees	\$0.1	\$0.2	\$0.2
Property	\$0.2	\$0.5	\$0.7

State and local tax revenue, capital expenditures

(\$ millions)

	State	Local	Total
Total taxes	\$1.9	\$1.1	\$3.0
Sales	\$0.8	\$0.2	\$1.0
Personal Income	\$0.9	\$0.0	\$0.9
Corporate	\$0.1	\$0.0	\$0.1
Social Insurance	\$0.1	\$0.0	\$0.1
Excise and Fees	\$0.1	\$0.1	\$0.2
Property	\$0.0	\$0.7	\$0.7

Source: Tourism Economics

Source: Tourism Economics



Section 8

CITY KEY FINDINGS (FY 22/23)

City Summary Findings (FY 22/23)

The following section presents the economic impacts generated by Living Desert Zoo and Garden patrons off-site spending in five cities within Greater Palm Springs in FY 22/23.

These figures exclude the economic impact generated by the Living Desert Zoo and Garden's operational expenditures, which were included in the aggregated Zoo impacts for all Greater Palm Springs presented in the prior sections.

The accompanying table outlines the economic impacts generated by off-site visitor spending in each city: Palm Springs accounted for the largest portion (\$30.9 million), followed by Palm Desert (\$24.9 million), La Quinta (\$14.9 million), Rancho Mirage (\$14.0 million), and Indian Wells (\$7.9 million).

Living Desert Zoo and Gardens Summary Economic Impacts (\$ millions and number of jobs)

	Indian Wells	Palm Desert	Palm Springs	La Quinta	Rancho Mirage
Business Sales	\$7.9	\$24.9	\$30.9	\$14.9	\$14.0
Personal Income	\$2.7	\$8.5	\$10.5	\$5.1	\$4.7
Employment	74	235	292	140	132
Taxes	\$1.8	\$5.4	\$7.2	\$3.3	\$3.0
State & local taxes	\$1.2	\$3.6	\$5.0	\$2.2	\$2.0
Federal taxes	\$0.6	\$1.8	\$2.2	\$1.1	\$1.0

Source: Living Desert Zoo and Gardens, Tourism Economics
Note: Totals may not sum due to rounding.

LIVING DESERT ZOO AND GARDENS IMPACTS: INDIAN WELLS

VISITOR SPENDING ECONOMIC IMPACTS (FY 22/23)


DIRECT SPENDING (FY 22/23)

The Living Desert Zoo and Gardens generated significant economic impacts in Indian Wells as Zoo patrons spent money at businesses and establishments in Indian Wells during their trip to the Zoo, including local restaurants, retailers, and recreation/entertainment venues.

In FY 22/23, Zoo patrons spent \$5.5 million in Indian Wells, as outlined below.

 **\$5.5 MILLION**
Zoo Patron Spending In Indian Wells (FY 22/23)

 **\$2.7M** LODGING

 **\$1.8M** ENTERTAINMENT

 **\$0.7M** LOCAL TRANSPORTATION

 **\$0.2M** FOOD & BEVERAGE

 **\$0.1M** RETAIL

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' patron spending impact of \$5.5 million generated a total economic impact of \$7.9 million in the Indian Wells economy, which supported 74 part-time and full-time jobs and generated \$1.2 million in state and local taxes in FY 22/23.



\$7.9 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens
(FY 22/23)

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS IN INDIAN WELLS (FY 22/23)


\$7.9M
Total
Economic
Impact


74
Total
Jobs
Generated


\$1.2M
Total
State & Local
Tax Revenues

LIVING DESERT ZOO AND GARDENS IMPACTS: PALM DESERT

VISITOR SPENDING ECONOMIC IMPACTS (FY 22/23)

DIRECT SPENDING (FY 22/23)

The Living Desert Zoo and Gardens generated significant economic impacts in Palm Desert as Zoo patrons spent money at businesses and establishments in Palm Desert during their trip to the Zoo, including local restaurants, retailers, and recreation/entertainment venues.

In FY 22/23, Zoo patrons spent \$17.2 million in Palm Desert, as outlined below.



\$17.2 MILLION

Zoo Patron Spending In Palm Desert (FY 22/23)



\$6.2M LODGING



\$4.7M FOOD & BEVERAGE



\$3.0M RETAIL



\$2.0M ENTERTAINMENT



\$1.4M LOCAL TRANSPORTATION

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' patron spending impact of \$17.2 million generated a total economic impact of \$24.9 million in the Palm Desert economy, which supported 235 part-time and full-time jobs and generated \$3.6 million in state and local taxes in FY 22/23.



\$24.9 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens
(FY 22/23)

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS IN PALM DESERT (FY 22/23)



\$24.9M

Total
Economic
Impact



235

Total
Jobs
Generated



\$3.6M

Total
State & Local
Tax Revenues

LIVING DESERT ZOO AND GARDENS IMPACTS: PALM SPRINGS


VISITOR SPENDING ECONOMIC IMPACTS (FY 22/23)

DIRECT SPENDING (FY 22/23)

The Living Desert Zoo and Gardens generated significant economic impacts in Palm Springs as Zoo patrons spent money at businesses and establishments in Palm Springs during their trip to the Zoo, including local restaurants, retailers, and recreation/entertainment venues.

In FY 22/23, Zoo patrons spent \$21.1 million in Palm Springs, as outlined below.


 **\$21.1 MILLION**
Zoo Patron Spending In Palm Springs (FY 22/23)

 **\$11.7M** LODGING

 **\$5.4M** FOOD & BEVERAGE

 **\$1.3M** RETAIL

 **\$1.7M** LOCAL TRANSPORTATION

 **\$1.1M** ENTERTAINMENT

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' patron spending impact of \$21.1 million generated a total economic impact of \$30.9 million in the Palm Springs economy, which supported 292 part-time and full-time jobs and generated \$5.0 million in state and local taxes in FY 22/23.



\$30.9 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens
(FY 22/23)

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS IN PALM SPRINGS (FY 22/23)


\$30.9M
Total
Economic
Impact


292
Total
Jobs
Generated


\$5.0M
Total
State & Local
Tax Revenues

LIVING DESERT ZOO AND GARDENS IMPACTS: LA QUINTA

VISITOR SPENDING ECONOMIC IMPACTS (FY 22/23)

DIRECT SPENDING (FY 22/23)

The Living Desert Zoo and Gardens generated significant economic impacts in La Quinta as Zoo patrons spent money at businesses and establishments in La Quinta during their trip to the Zoo, including local restaurants, retailers, and recreation/entertainment venues.


In FY 22/23, Zoo patrons spent \$10.3 million in La Quinta, as outlined below.

 **\$10.3 MILLION**
Zoo Patron Spending In La Quinta (FY 22/23)

 **\$3.8M** FOOD & BEVERAGE

 **\$3.8M** LODGING

 **\$1.2M** RETAIL

 **\$0.9M** ENTERTAINMENT

 **\$0.5M** LOCAL TRANSPORTATION

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' patron spending impact of \$10.3 million generated a total economic impact of \$14.9 million in the La Quinta economy, which supported 140 part-time and full-time jobs and generated \$2.2 million in state and local taxes in FY 22/23.



\$14.9 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens
(FY 22/23)

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS IN LA QUINTA (FY 22/23)


\$14.9M
Total
Economic
Impact


140
Total
Jobs
Generated


\$2.2M
Total
State & Local
Tax Revenues

LIVING DESERT ZOO AND GARDENS IMPACTS: RANCHO MIRAGE

VISITOR SPENDING ECONOMIC IMPACTS (FY 22/23)

DIRECT SPENDING (FY 22/23)

The Living Desert Zoo and Gardens generated significant economic impacts in Rancho Mirage as Zoo patrons spent money at businesses and establishments in Rancho Mirage during their trip to the Zoo, including local restaurants, retailers, and recreation/entertainment venues.

In FY 22/23, Zoo patrons spent \$9.7 million in Rancho Mirage, as outlined below.



\$9.7 MILLION

Zoo Patron Spending In Rancho Mirage (FY 22/23)



\$3.5M LODGING



\$2.4M FOOD & BEVERAGE



\$2.4M ENTERTAINMENT



\$0.8M LOCAL TRANSPORTATION



\$0.5M RETAIL

ECONOMIC IMPACTS

The Living Desert Zoo and Gardens' patron spending impact of \$9.7 million generated a total economic impact of \$14.0 million in the Rancho Mirage economy, which supported 132 part-time and full-time jobs and generated \$2.0 million in state and local taxes in FY 22/23.



\$14.0 MILLION

Total Economic Impact of the Living Desert Zoo and Gardens (FY 22/23)

ECONOMIC IMPACTS OF THE LIVING DESERT ZOO AND GARDENS IN RANCHO MIRAGE (FY 22/23)



\$14.0M

**Total
Economic
Impact**



132

**Total
Jobs
Generated**



\$2.0M

**Total
State & Local
Tax Revenues**

About Tourism Economics



Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, Buenos Aires, Dubai, Frankfurt, and Ontario.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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