

visit  greater
palm springs

Coachella Valley Resident Sentiment Study

Report of Findings
December 2022

Destination  Analysts





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RESEARCH OVERVIEW

This study was designed to provide Visit Greater Palm Springs with in-depth insights on Coachella Valley residents' current opinions regarding tourism in their communities:

- Measure resident sentiment from direct impacts of tourism on daily life
- Identify pain points of residents as well as strengths and opportunities
- Benchmark residents' sentiment towards working in the local tourism/hospitality industries
- Uncover insights to inform Visit Greater Palm Springs' destination management strategy and planning
- Identify metrics and key performance indicators that contribute to a holistic view of the County's and Greater Palm Springs' success



RESEARCH METHODOLOGY

Destination Analysts conducted an online survey of full-time adult residents of the Coachella Valley region of the County.

Respondents must have met the following screening requirements:

- Adults age 18+
- Currently resides in the Coachella Valley

In total, 800 completed surveys were collected between August 23 and September 14, 2022.

Coachella Valley Resident Sentiment Survey

1. In what year were you born?
<DROP DOWN> > **TERMINATE SURVEY IF UNDER 18**
[Show Map of Coachella Valley Area]

2. Do you currently live in the Coachella Valley?
 Yes
 No > **TERMINATE SURVEY**

2b. In which city do you currently reside?
 Cathedral City
 Coachella
 Desert Hot Springs
 Indian Wells
 Indio
 La Quinta
 Palm Desert
 Palm Springs
 Rancho Mirage
 Other

4. What is your highest level of formal education? |
 Some high school or less
 High school graduate
 Some college
 College graduate
 Some graduate school
 Completed graduate degree
 I prefer not to answer

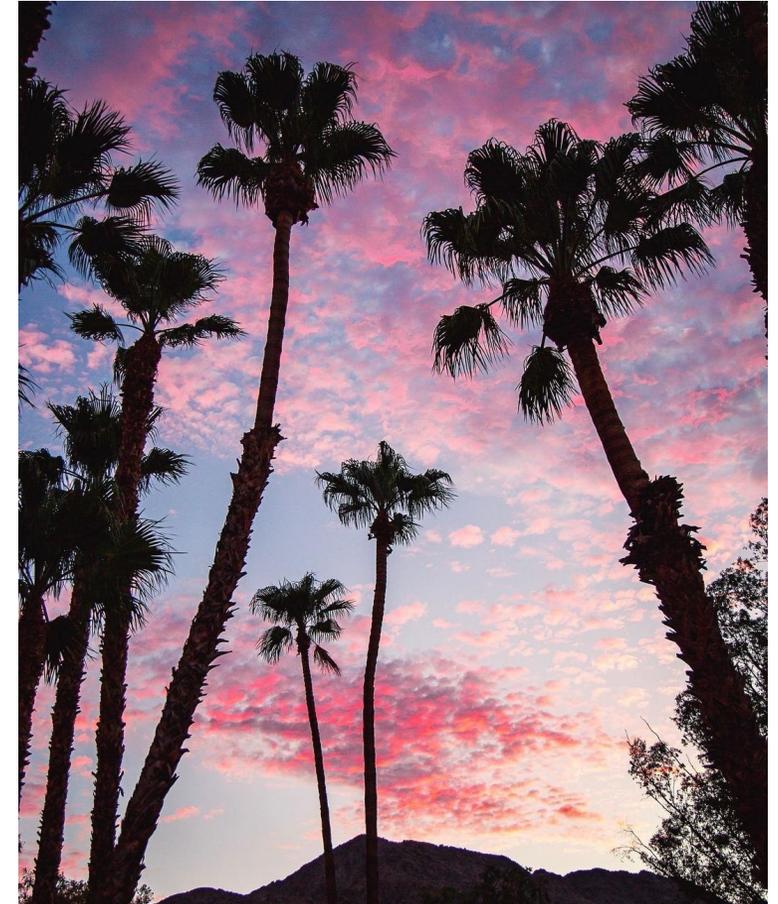
3. Which of the following best describes your current marital status?
 Single
 Single with children under 18
 Married
 Married with children under 18
 Domestic partnership
 Other

Destination Analysts 1

REPORT DEFINITIONS

The following terms are used in the summaries, analysis, charts and/or data tables within this report.

- **Gen Z/Millennial/Gen X/Boomer** – Gen Z 18-25 years old; Millennial 26-41 years old; Gen X 42-57 years old; Boomer 58+ years old
- **Employed** – residents whose current employment status is employed full-time or part-time, and who may or may not be seeking an employment change
- **Retired** – residents whose current employment status is retired
- **Unemployed** – residents whose current employment status is unemployed, and who may or may not be seeking work
- **Seeking Work** – residents who are currently looking for work or employment change, regardless of their current employment status
- **Coachella Valley Native** – residents who have lived in the Coachella Valley area for their entire lives
- **Coachella Valley Transplant** – residents who moved to the Coachella Valley from elsewhere
- **Tourism Employee** – residents who are currently employed and whose employer is directly supported by the Coachella Valley tourism industry
- **Non-Tourism Employee** – residents who are currently employed and whose employer is not directly supported by the Coachella Valley tourism industry
- **DMO Aware** – residents who are aware that Coachella Valley has an official destination marketing organization
- **DMO Unaware** – residents are not aware that Coachella Valley has an official destination marketing organization





EXECUTIVE SUMMARY

ECONOMIC IMPACT OF TOURISM

(% OF RESIDENTS WHO AGREE)

TOURISM IS IMPORTANT FOR THE ECONOMY **98%**



TOURISM-GENERATED REVENUES IS IMPORTANT FOR GOVT SERVICES **94%**



TAX IMPACT INCREASED APPRECIATION **73%**



SUPPORT TOURISM INDUSTRY GROWTH **77%**



QUALITY OF LIFE

TOURISM IMPROVES DAILY LIFE



TOURISM CAREER PERCEPTIONS

7.3

MEAN SCORE

RATING OF TOURISM INDUSTRY CAREERS ON AN 11-POINT SCALE

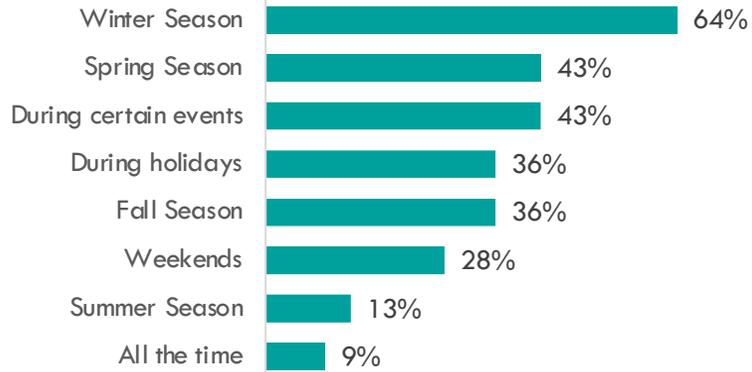
*AMONG RESIDENTS WHO ARE EMPLOYED/SEEKING WORK

TOP 5 TOURISM CAREER ATTRIBUTES

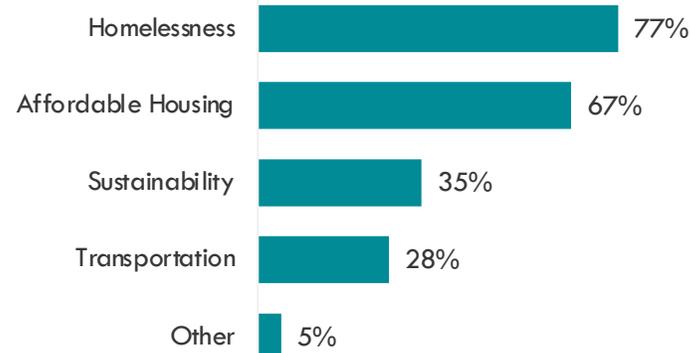


*AMONG RESIDENTS WHO ARE EMPLOYED/SEEKING WORK

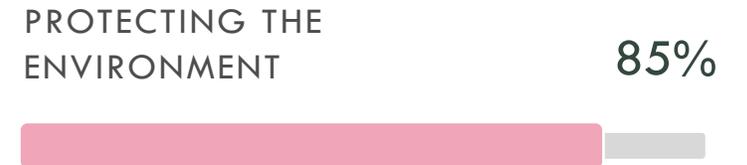
HEAVY TOURISM PERIODS



COACHELLA VALLEY KEY ISSUES



EXPECTATIONS FOR HOW PALM SPRINGS SHOULD BE PROMOTED (TOP 2 BOX)



DMO AWARENESS



FAMILIARITY WITH DMO'S EFFORTS



SATISFACTION WITH DMO'S EFFORTS

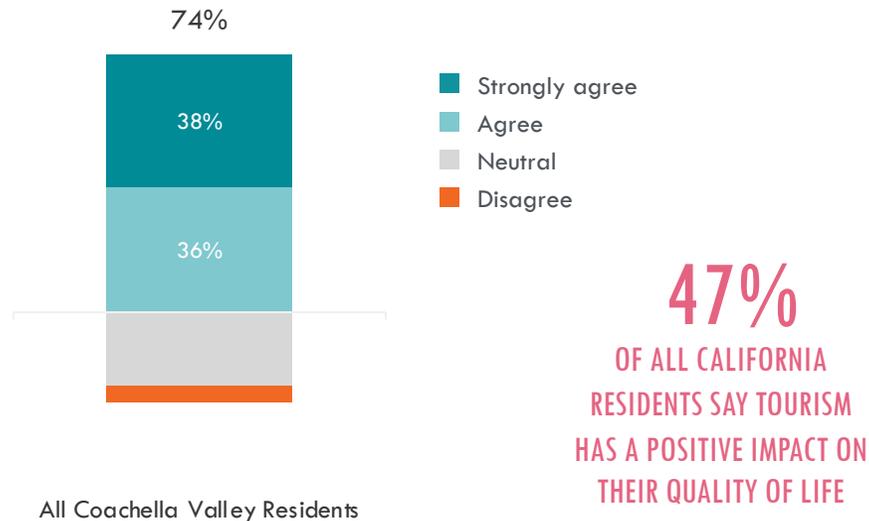


Executive Summary

Quality of Life

Nearly three quarters (74%) of residents agree that tourism makes Coachella Valley a better place to live. This positive sentiment was highest among tourism employees (86%), followed by Baby Boomers (80%), Retirees (79%), and residents who are aware of the DMO (79%). When asked to name Coachella's most important industries, 56 percent of respondents listed tourism. This was followed distantly by restaurants (30%) and agriculture (25%).

Figure: Tourism's Positive Impact on Quality of Life



Among residents who feel that Coachella Valley experiences seasonal congestion, the Winter Season was the most frequently cited period of congestion caused by tourism. This was especially high among Retirees (79%), Boomers (79%), and Transplants (75%). Residents were also likely to feel that seasonal congestion occurs in the Spring (43%) and during certain events (43%).

Of residents who agreed that Coachella Valley experiences seasonal congestion, 76 percent said that Palm Springs was the area most affected by tourism congestion. This was followed distantly by Palm Desert (43%) and La Quinta (35%). In particular, those residents who are Retired (84%) or Seeking Work (82%) were more likely to name Palm Springs.

The majority of residents (77%) selected homelessness as the issue that needs more support in the region. Affordable housing was also selected by more than two-thirds (67%) of residents, indicating that housing issues are top of mind for residents of the Coachella Valley. Affordable housing is a particular pain point among Gen Z, who were +18 percentage points more likely to select this issue than the rest of the population. This was also a more prominent issue for residents who are seeking work (+18pp) and/or who are unemployed (+12pp).

When asked what changes would contribute to the improvement of Coachella Valley, helping the homeless was mentioned by 19 percent of residents. Improving transportation (16%) and lowering costs (15%) were the next most frequently suggested changes and developments.

Executive Summary

Economic Impact of Tourism

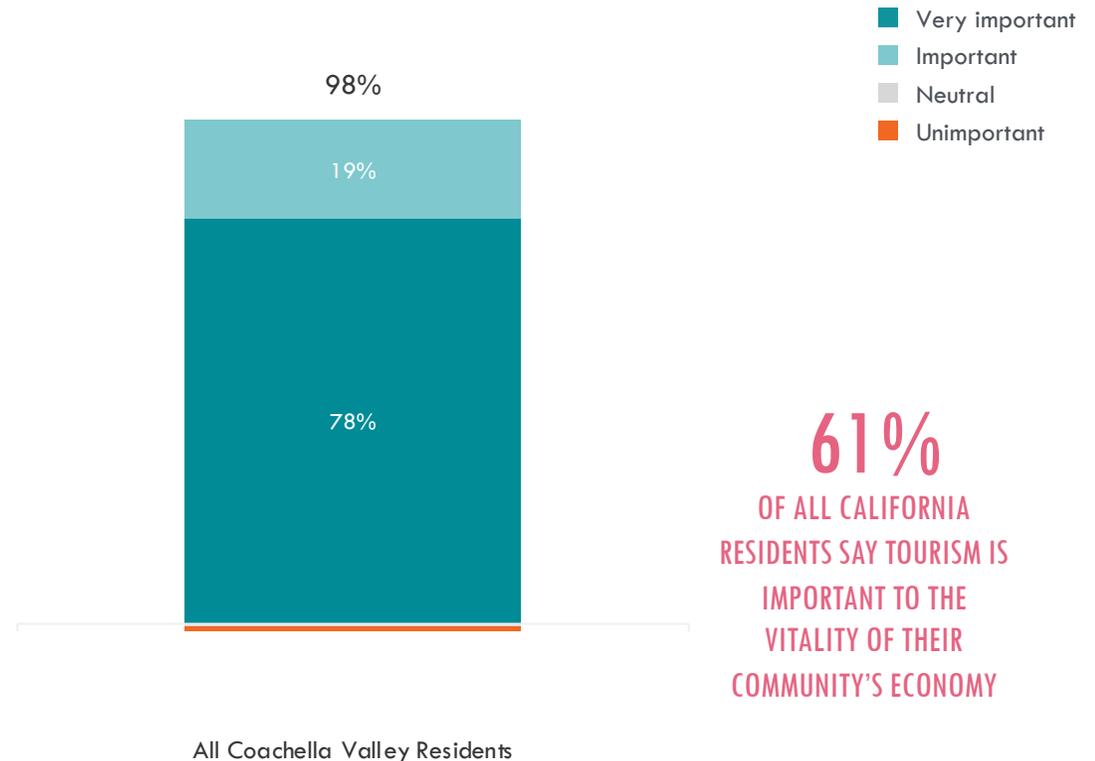
Overwhelmingly (98%), residents feel that the tourism industry is important to the vitality of the Coachella Valley economy. 78 percent of residents said that tourism was very important. Retirees (88%), Boomers (86%), Transplants (83%), DMO Aware (83%), and Tourism Employees (83%) were most likely to rank tourism as very important to the economy. Conversely, Gen Z (53%) were significantly less likely to rank tourism as very important to the economy.

The majority (94%) of residents said tourism-generated revenues are important in paying for government services in the Coachella Valley. This was highest among Retirees (99%), Boomers (98%), and DMO Aware (96%). However, Gen Z (82%) and those Seeking Work (85%) were less likely to deem tourism revenue important.

Over three-fourths (77%) of residents agree that they would support growing the Coachella Valley tourism industry, especially Tourism Employees (86%), DMO Aware (80%), and Boomers (80%). Those who are Unemployed (67%) and/or Seeking Work (66%) were least likely to agree with this statement.

Understanding the impact of tourism on taxes had a positive impact on residents, with 73 percent saying the statistic made them appreciate tourism more. This was highest among Tourism Employees (79%), followed by those Seeking Work (77%).

Figure: Tourism's Economic Impact

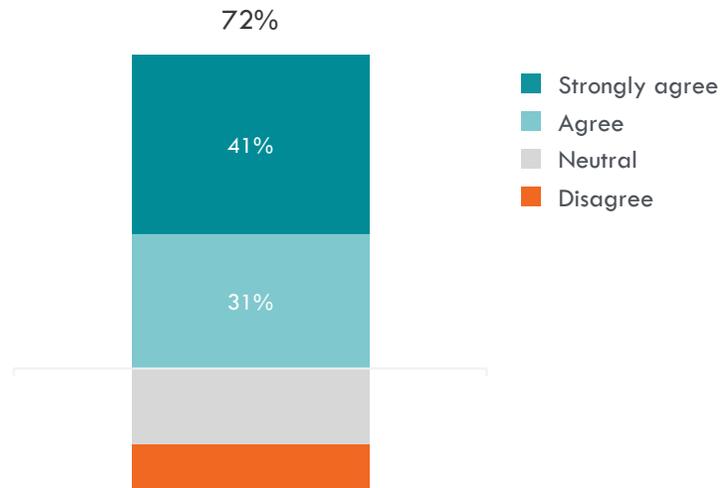


Executive Summary

Vacation Rentals – Mindset and Behavior

Most residents (72%) agree that well-regulated vacation rentals are good for the Coachella Valley. Tourism Employees (81%) had the highest propensity to agree with this statement. Similarly, 80 percent of Gen Z agreed, and furthermore this generation was +9 percentage points more likely to strongly agree (50%).

Figure: Positive Impact of Regulated Vacation Rentals Agreement



All Coachella Valley Residents

Only 13 percent of residents agreed that they have personally rented their home to visitors as a vacation rental. This was significantly higher among Tourism Employees (35%), Coachella Valley Natives (28%), and Millennials (24%).

Residents had a mostly positive opinion of vacation rental visitors' economic impact, with 76 percent agreeing that these types of visitors support local businesses and services. Tourism Employees were +10 percentage points more likely to agree compared to overall residents, whereas Gen Z residents were -5 percentage points less likely.

Airport Perceptions

Nearly two-thirds (62%) of residents reported flying in or out of the Palm Springs International Airport over the last 5 years. This was highest among Boomers (74%) and Retirees (72%), and lowest among residents who are Unemployed (32%), Gen Z (38%), and/or Seeking Work (39%).

The majority (83%) of residents said that it is important or very important that Palm Springs International Airport (PSP) continue to expand its flight route offerings. This was highest among Tourism Employees (90%). However, this segment was also the least likely (23%) to say that this was very important to them. Residents who are Unemployed (68%), Seeking Work (72%), and/or Gen Z (74%) were least likely to say that PSP flight route expansions are important to them.

Hawaii (15%) was the most frequently named destination that residents would like to see added as a direct flight. This was followed closely by New York City (14%), then Mexico (10%).

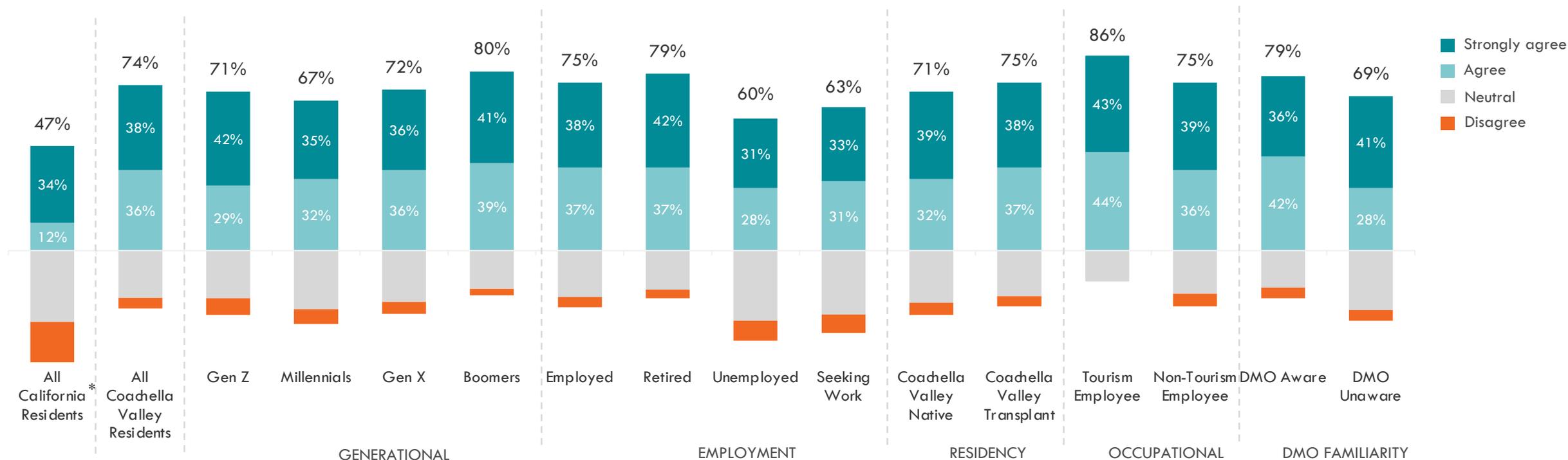
A group of pink flamingos is wading in a pond at sunset. The birds are reflected in the water, and the scene is bathed in a warm, golden light. In the background, there are several tall palm trees. The text "QUALITY OF LIFE" is overlaid in the center of the image.

QUALITY OF LIFE

TOURISM'S IMPACT ON QUALITY OF LIFE

Nearly three quarters (74%) of residents agree that tourism makes Coachella Valley a better place to live. This positive sentiment was highest amongst tourism employees (86%), followed by Baby Boomers (80%), Retirees (79%), and residents who are aware of the DMO (79%).

Figure: Tourism's Positive Impact on Quality-of-Life Agreement



Question: How much do you agree with this statement? Tourism makes Coachella Valley a better place to live. Base: All respondents. 795 completed surveys.

*Source: Destination Analysts, State of the American Traveler Study, October 2022. Base: A nationally representative sample of American travelers. 396 California residents

TOP COACHELLA VALLEY INDUSTRIES

When asked to name Coachella's most important industries, 56 percent of respondents listed tourism. This was followed distantly by restaurants (30%) and agriculture (25%).

Figure: Top Coachella Valley Industries

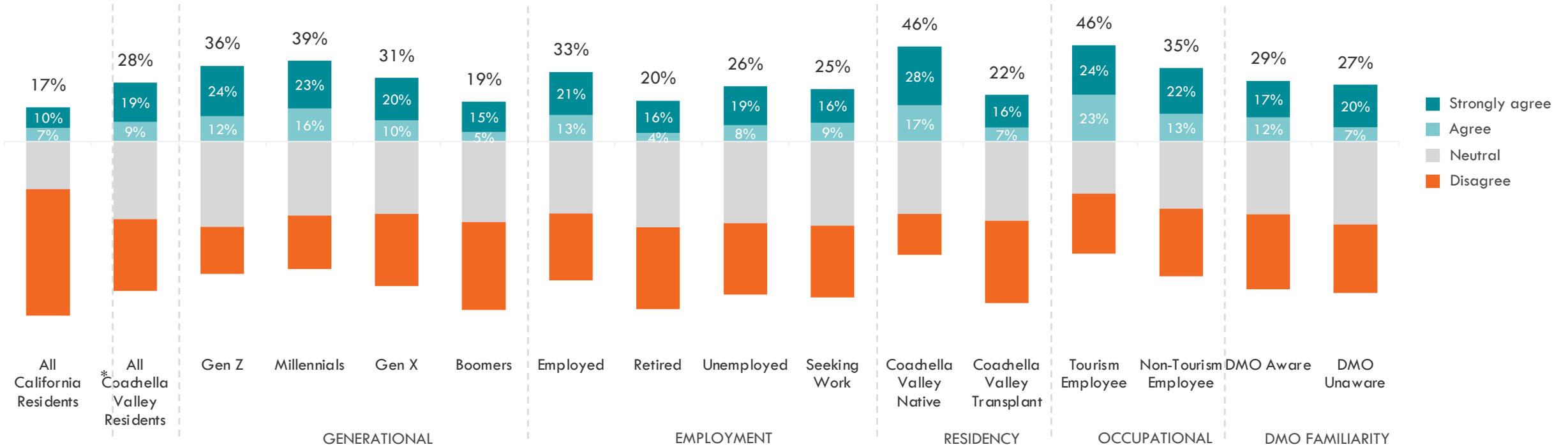


Question: In your opinion, what are the Coachella Valley area's most important industries? Please rank the five industries that come to mind beginning with the most important. You may list as many as five (5) industries. Base: All respondents. 738 completed surveys.

OPINION OF VISITOR VOLUME

28 percent of residents agree that Coachella Valley experiences seasonal compression. This was highest among Coachella Valley Natives (46%) and Tourism Employees (46%). Conversely, Baby Boomers (19%), Retirees (20%), and Coachella Valley Transplants (22%) were the least likely to agree that the area experiences seasonal compression.

Figure: Overtourism Agreement



Question: How much do you agree with this statement? Coachella Valley has too many visitors. Base: All respondents. 796 completed surveys.

*Source: Destination Analysts, State of the American Traveler Study, October 2022. Base: A nationally representative sample of American travelers. 396 California residents

HEAVY TOURISM PERIODS

Among residents who feel that Coachella Valley experiences seasonal compression, the Winter Season was the most frequently cited period of congestion caused by tourism. This was especially high among Retirees (79%), Boomers (79%), and Transplants (75%). Residents were also likely to feel that seasonal compression occurs the Spring (43%) and during certain events (43%).

Figure: Heavy Tourism Periods

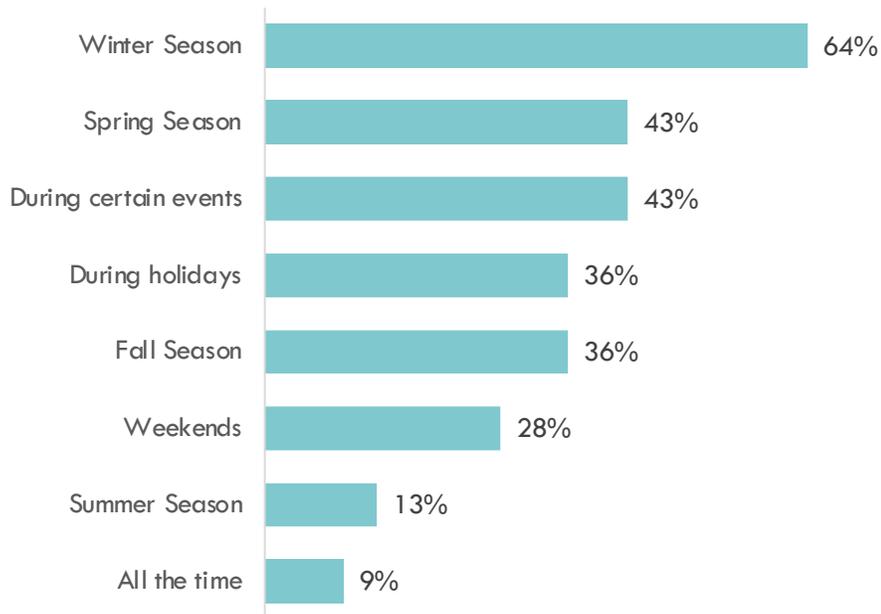
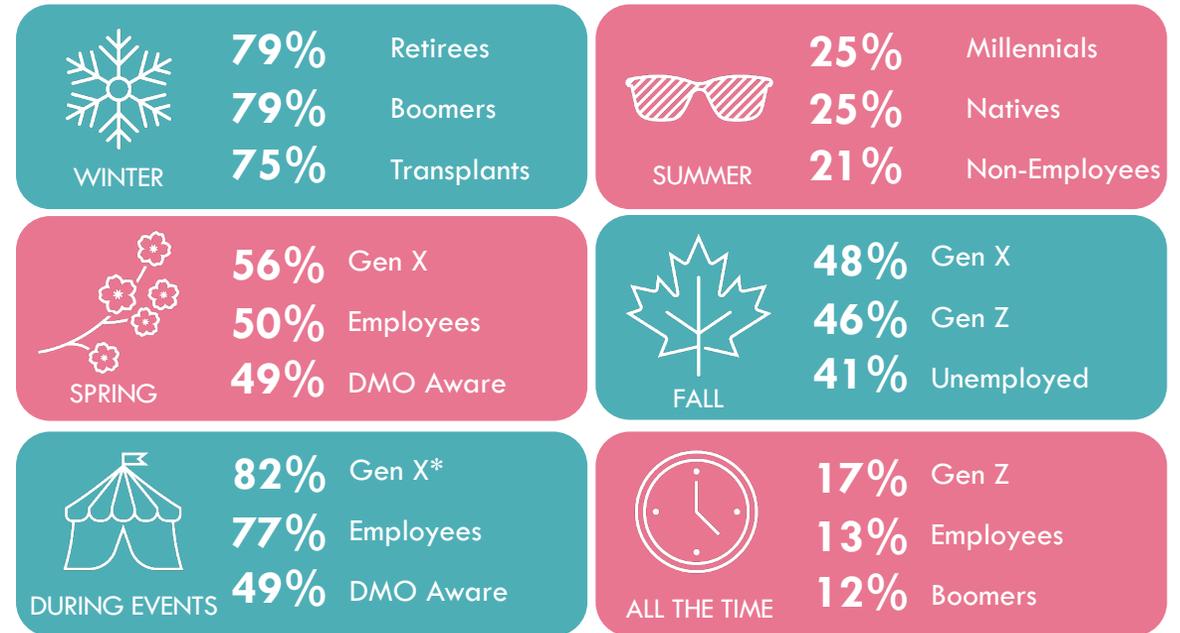


Figure: Resident Segments Likeliest to Say These are Heavy Tourism Periods



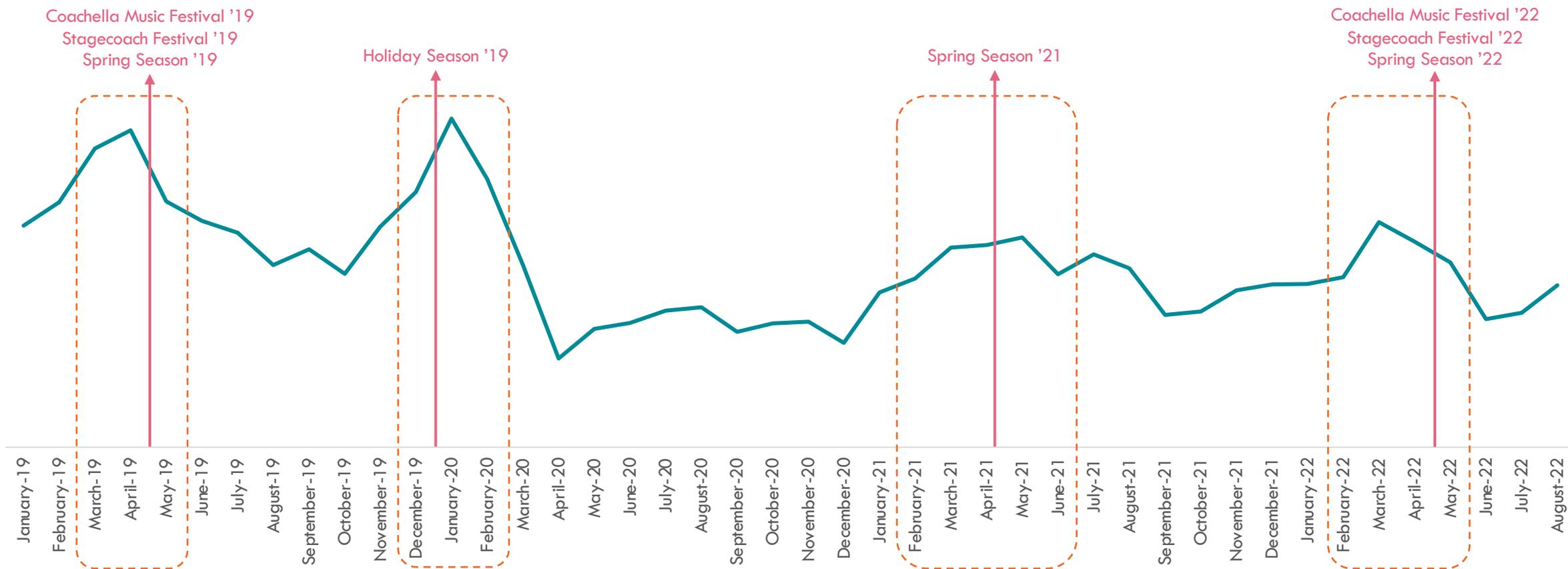
Question: When does Coachella Valley have too many visitors (or congestion caused by tourism)? (Select all that apply)

Base: All respondents who agreed that Coachella Valley has too many visitors. 226 completed surveys.

GEO-LOCATION TRIP COUNTS

Keeping the aforementioned reported heavy tourism periods in mind, data in the APOLLO Palm Springs dashboard similarly reflects high levels of trip counts during the Winter, Spring, special events, and holiday seasons. Looking at the data starting from January 2019 through 2022 year-to-date, there are notable peaks in geo-location trip counts that align with the high traffic periods described by residents.

Figure: Geo-Location Trip Counts



HEAVY TOURISM AREAS

Of residents who agreed that Coachella Valley experiences seasonal compression, 76 percent said that Palm Springs was the area most affected by tourism congestion. This was followed distantly by Palm Desert (43%) and La Quinta (35%). In particular, those residents who are Retired (84%) or Seeking Work (82%) were more likely to name Palm Springs.

Figure: Heavy Tourism Areas

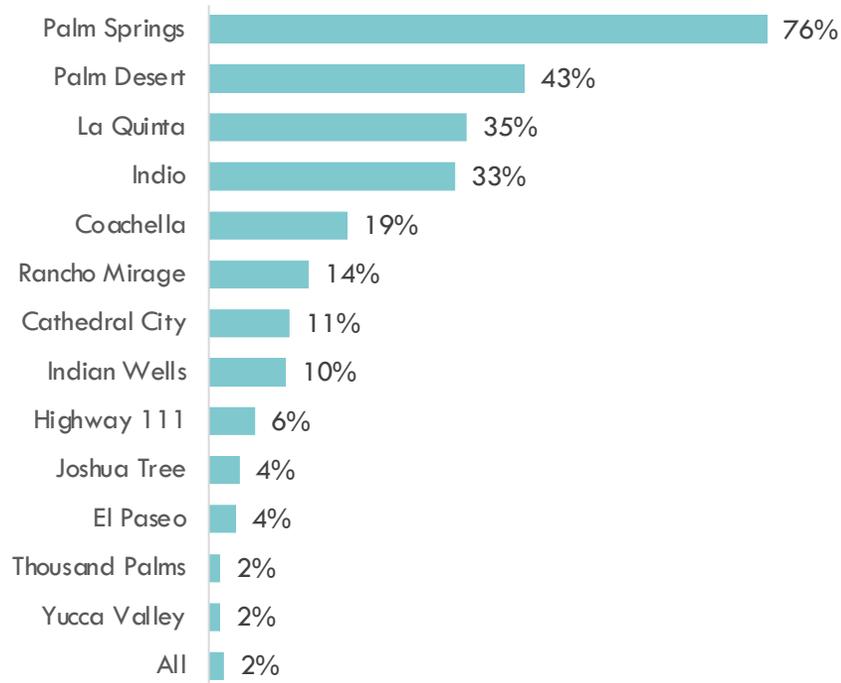


Figure: Resident Segments Likeliest to Say These Areas Experience Heavy Tourism

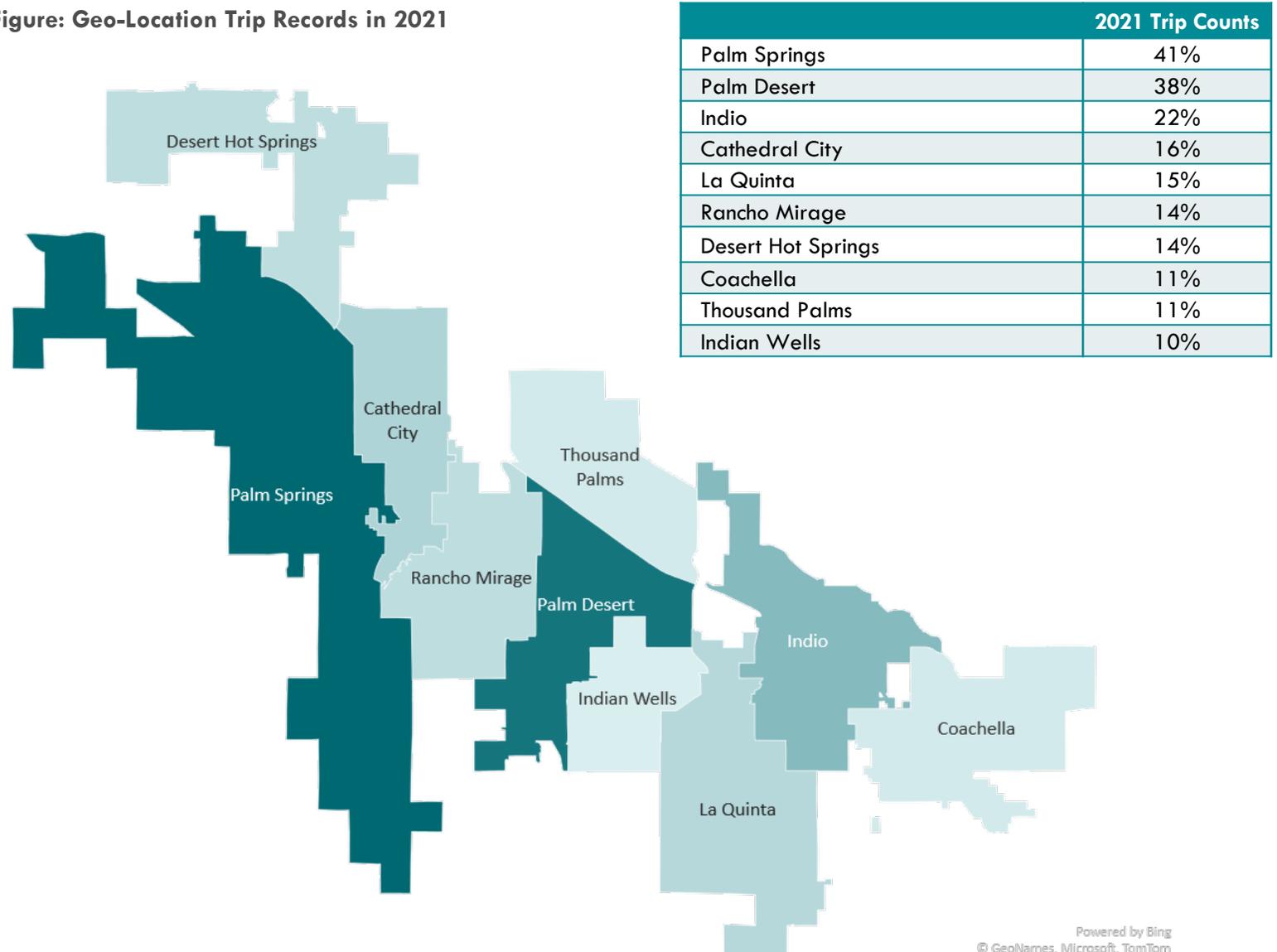


Question: Which local neighborhoods or areas do you feel have too many visitors (or congestion caused by tourism)? (Write in up to five neighborhoods or areas)
 Base: All respondents who agreed that Coachella Valley has too many visitors. 192 completed surveys.

GEO-LOCATION MAP

Geo-location trip records of 2021 from the APOLLO dashboard demonstrate that Palm Springs, Palm Desert, and Indio are the top visited cities in the Greater Palm Springs area. This dataset mirrors residents' assessment of high tourism traffic in Palm Springs and Palm Desert. However, while Cathedral City has a relatively high trip count volume, it was less likely to be reported by residents as a heavy tourism area. Residents also perceive Coachella as an area that attracts a significant number of visitors, but in 2021 no major festivals or events took place, which may explain the lower volume in geo-location counts.

Figure: Geo-Location Trip Records in 2021



PERCEPTION OF VISITORS

When asked to think about tourism and write-in their top associations with visitors to the Coachella Valley area, 35 percent of residents listed different types of people, particularly LGBTQ visitors and those from elsewhere in California. Art festivals (28%), including Coachella, and Sports (21%) such as tennis and golf, were also listed frequently.

Figure: Perception of Visitors



Question: Let's now focus on the tourism industry. When you think of visitors in the Coachella Valley area, what first comes to mind? (Write in up to three (3) things)

Base: All respondents. 800 completed surveys.

COACHELLA VALLEY ISSUES THAT NEED MORE SUPPORT

The majority of residents (77%) selected homelessness as the issue that needs more support in the region. Affordable housing was also selected by more than two-thirds (67%) of residents, indicating that housing issues are top of mind for residents of the Coachella Valley.

Figure: Coachella Valley Issues

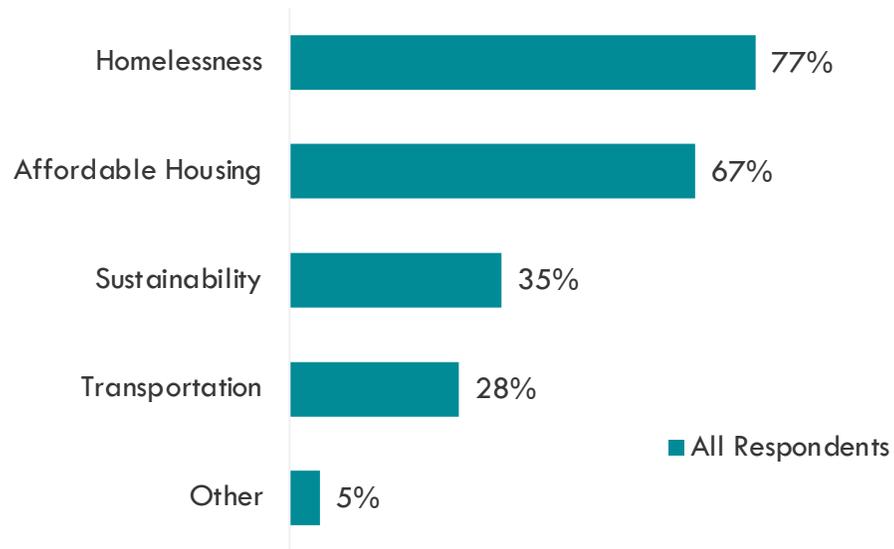
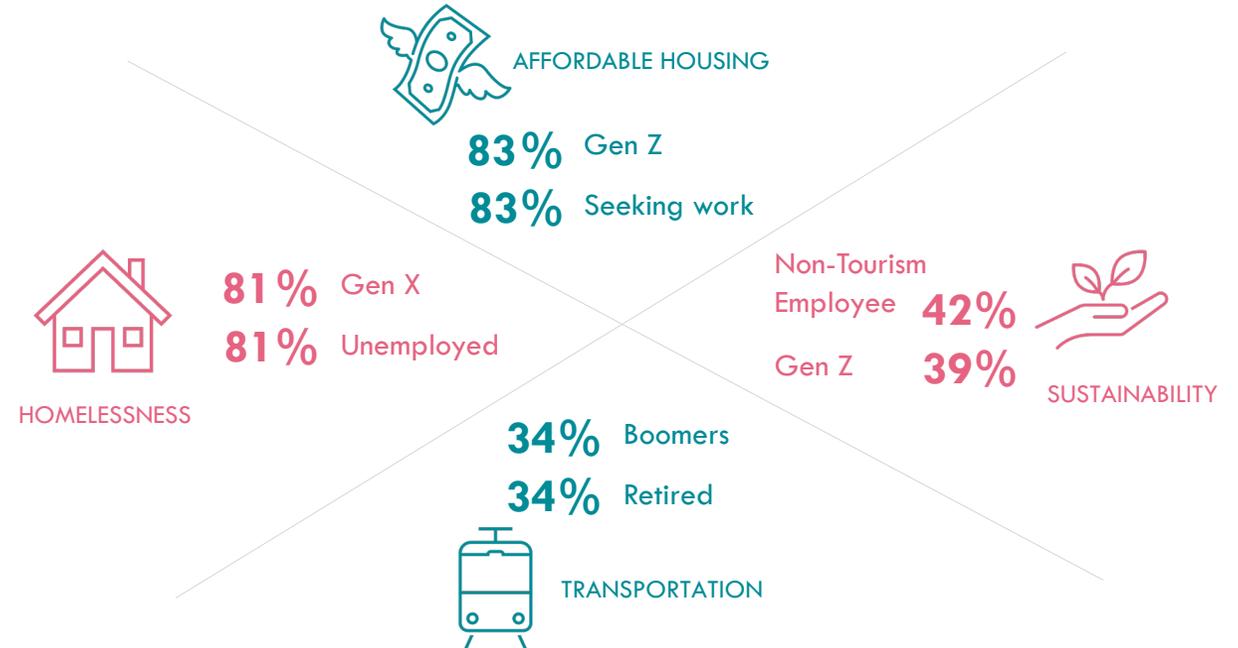


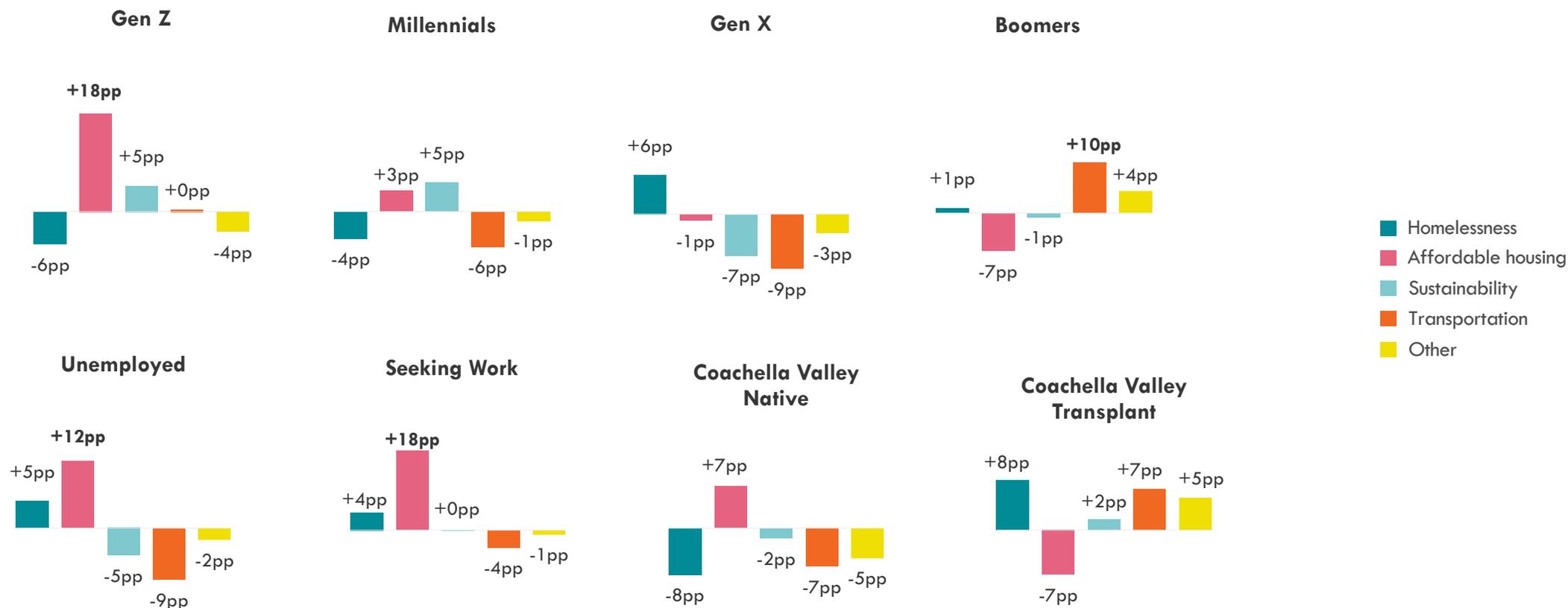
Figure: Resident Segments Likeliest to Select These as Issues that Need More Support



Question: Which of the following issues need more support in the Coachella Valley? (Select all that apply) Base: All respondents. 800 completed surveys.

COACHELLA VALLEY ISSUES THAT NEED MORE SUPPORT *CONT'D*

Affordable housing is a particular pain point among Gen Z, who were +18 percentage points more likely to select this issue than the rest of the population. This was also a more prominent issue for residents who are seeking work (+18pp) and/or who are unemployed (+12pp).

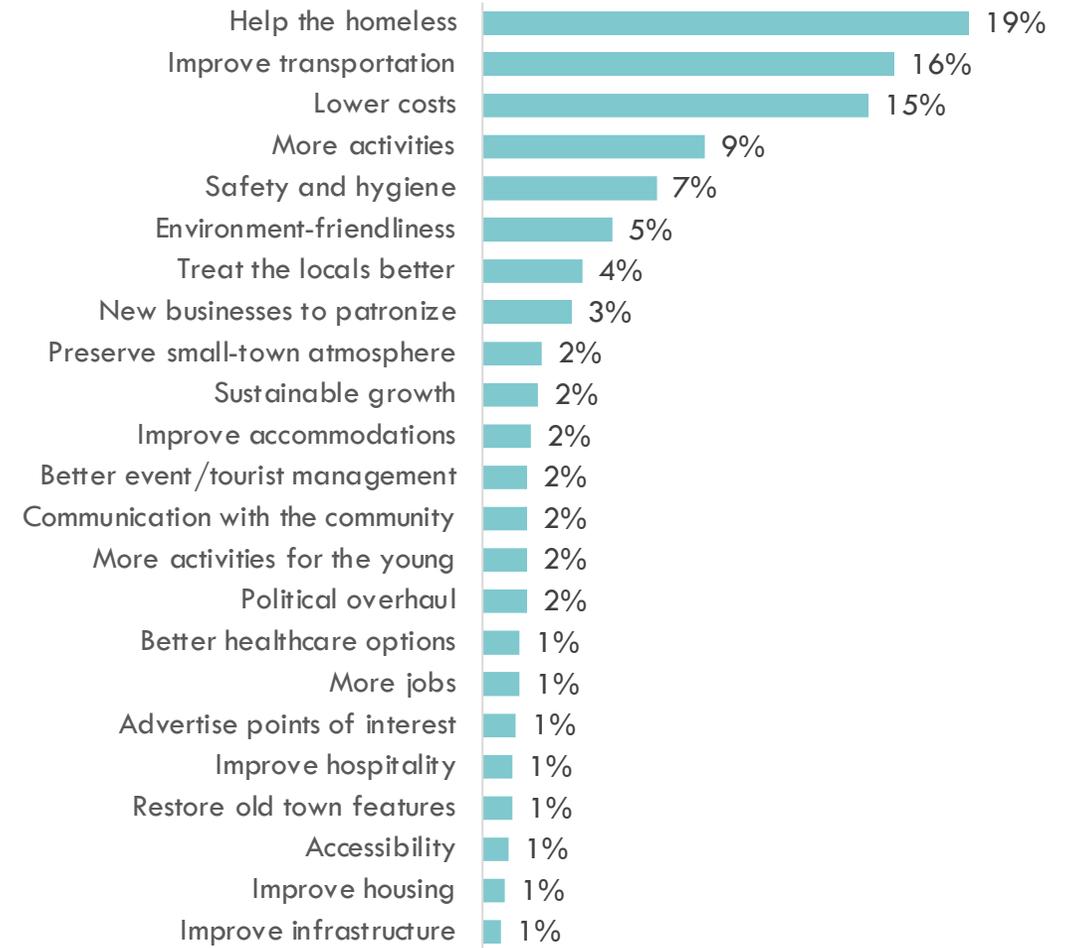


Question: Which of the following issues need more support in the Coachella Valley? (Select all that apply) Base: All respondents. 800 completed surveys.

COACHELLA VALLEY SUGGESTIONS FOR IMPROVEMENT

When asked what changes would contribute to the improvement of Coachella Valley, helping the homeless was mentioned by 19 percent of residents. Improving transportation (16%) and lowering costs (15%) were the next most frequently suggested changes and developments.

Figure: Coachella Valley Suggestions for Improvement



Question: In your opinion what changes and/or developments would contribute to making the Coachella Valley area better for BOTH visitors and local residents?
Base: All respondents. 696 completed surveys.

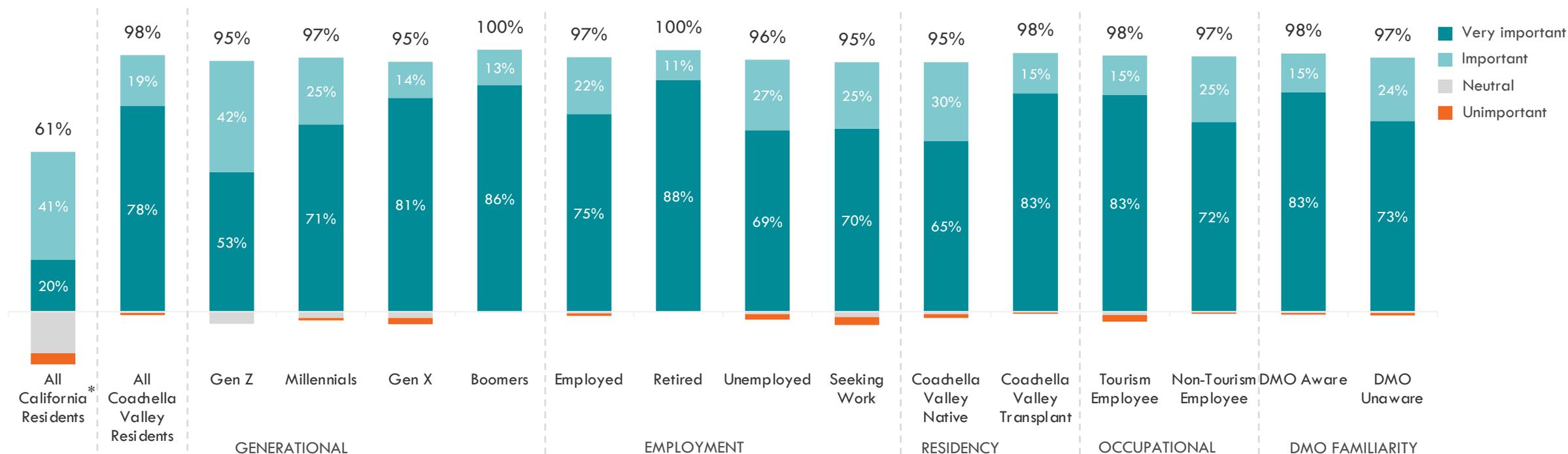


ECONOMIC IMPACT OF TOURISM

TOURISM'S ECONOMIC IMPACT

Overwhelmingly (98%), residents feel that the tourism industry is important to the vitality of the Coachella Valley economy. 78 percent of residents said that tourism was very important. Retirees (88%), Boomers (86%), Transplants (83%), DMO Aware (83%), and Tourism Employees (83%) were most likely to rank tourism as very important to the economy. Conversely, Gen Z (53%) were significantly less likely to rank tourism as very important to the economy.

Figure: Tourism's Economic Impact



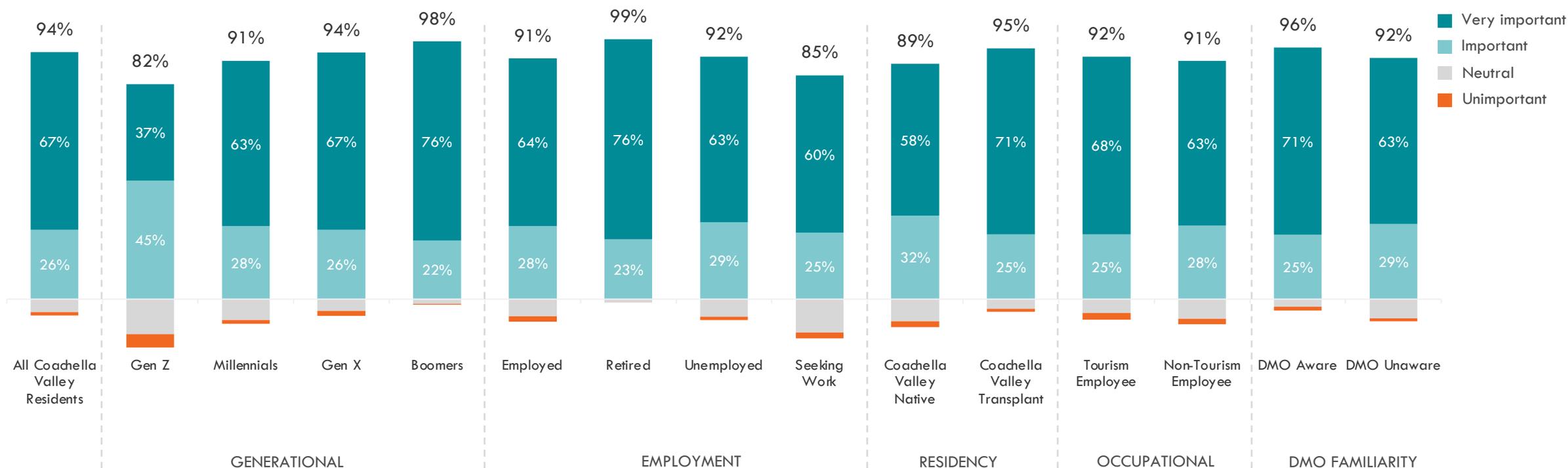
Question: How important is the tourism industry to the vitality of the Coachella Valley's economy? Base: All respondents. 794 completed surveys.

*Source: Destination Analysts, State of the American Traveler Study, October 2022. Base: A nationally representative sample of American travelers. 396 California residents

TOURISM'S REVENUE IMPORTANCE

The majority (94%) of residents said tourism-generated revenues are important in paying for government services in the Coachella Valley. This was highest among Retirees (99%), Boomers (98%), and DMO Aware (96%). However, Gen Z (82%) and those Seeking Work (85%) were less likely to deem tourism revenue important.

Figure: Tourism's Revenue Importance

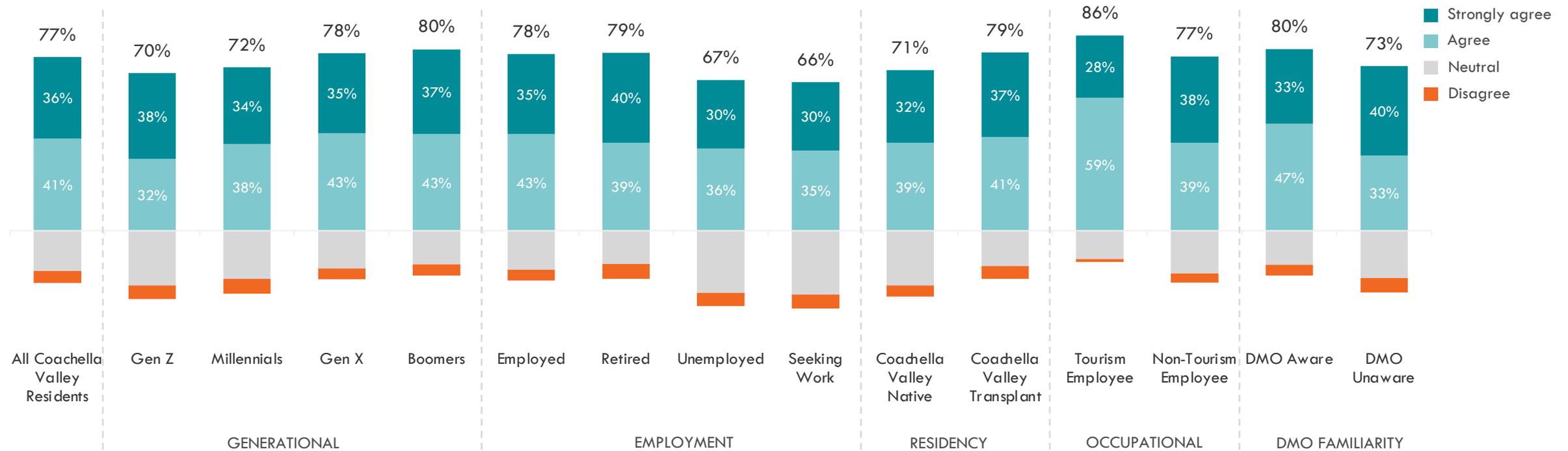


Question: How important are tourism-generated revenues in paying for the Coachella Valley's government services (like police, firefighters, schools, road and repairs)?
 Base: All respondents. 794 completed surveys.

SUPPORT FOR TOURISM INDUSTRY GROWTH

Over three-fourths (77%) of residents agree that they would support growing the Coachella Valley tourism industry, especially Tourism Employees (86%), DMO Aware (80%), and Boomers (80%). Those who are Unemployed (67%) and/or Seeking Work (66%) were least likely to agree with this statement.

Figure: Support for Tourism Industry Growth Agreement

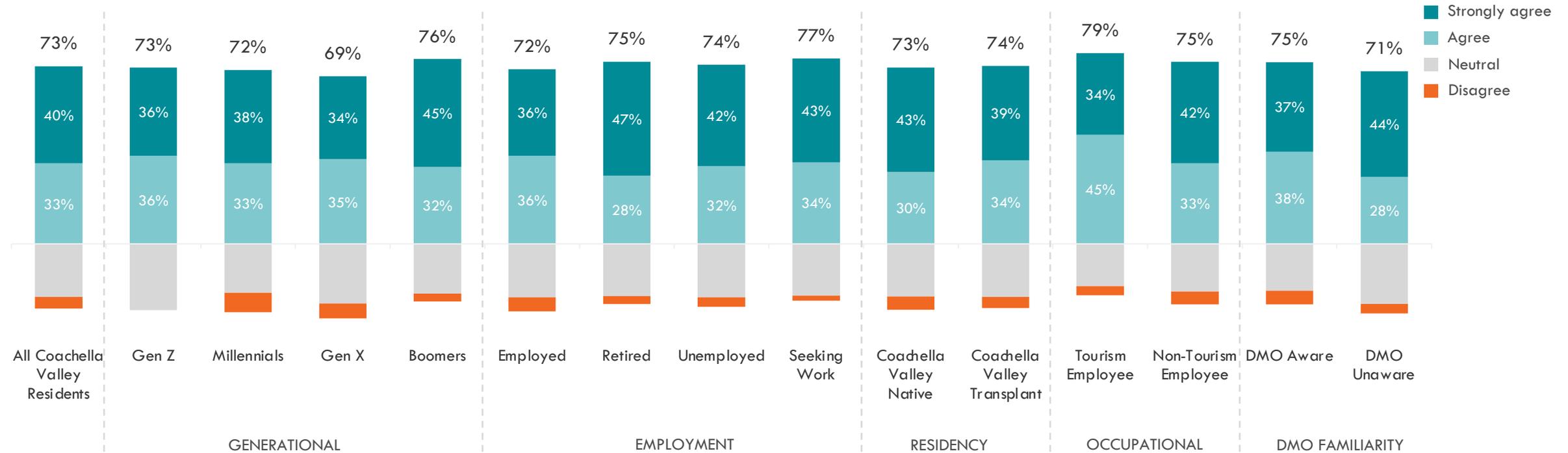


Question: How much do you agree with this statement? I support growing Coachella Valley's tourism industry. Base: All respondents. 797 completed surveys.

INCREASED TOURISM APPRECIATION DUE TO TAX IMPACT

Understanding the impact of tourism on taxes had a positive impact on residents, with 73 percent saying the statistic made them appreciate tourism more. This was highest among Tourism Employees (79%), followed by those Seeking Work (77%).

Figure: Tax Impact Increased Tourism Appreciation Agreement



Question: Last year, tourism saved each COACHELLA VALLEY HOUSEHOLD \$3,970 in taxes. With this piece of information in mind, please share how much you agree with the following statement: This statistic makes me appreciate tourism more. Base: All respondents. 791 completed surveys.

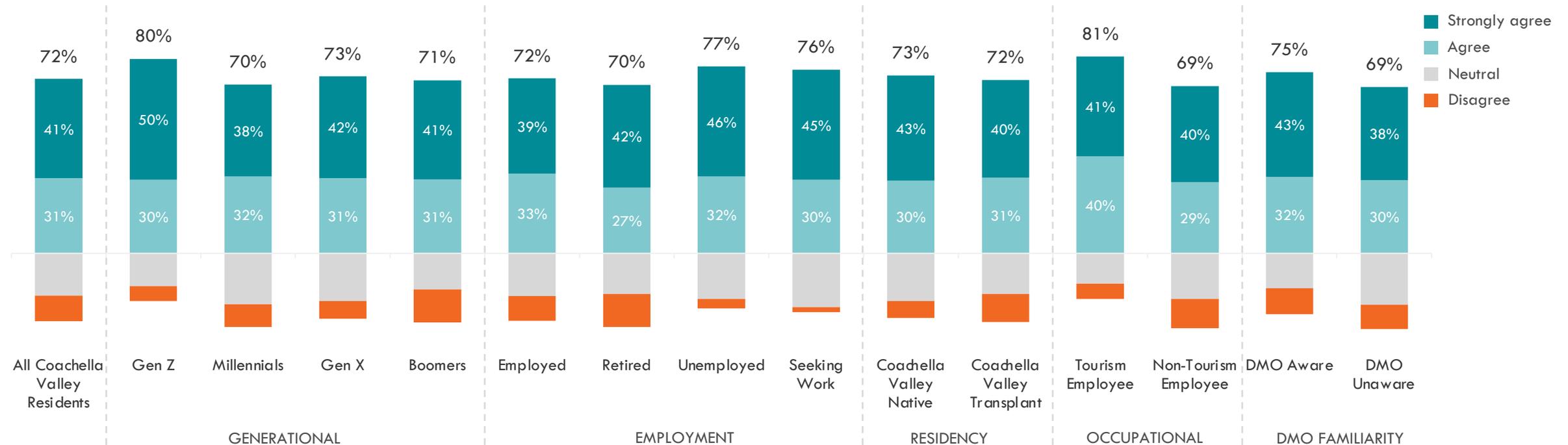


VACATION RENTALS MINDSET & BEHAVIOR

VACATION RENTAL REGULATION

Most residents (72%) agree that well-regulated vacation rentals are good for the Coachella Valley. Tourism Employees (81%) had the highest propensity to agree with this statement. Similarly, 80 percent of Gen Z agreed, and furthermore this generation was +9 percentage points more likely to strongly agree (50%).

Figure: Positive Impact of Regulated Vacation Rentals Agreement

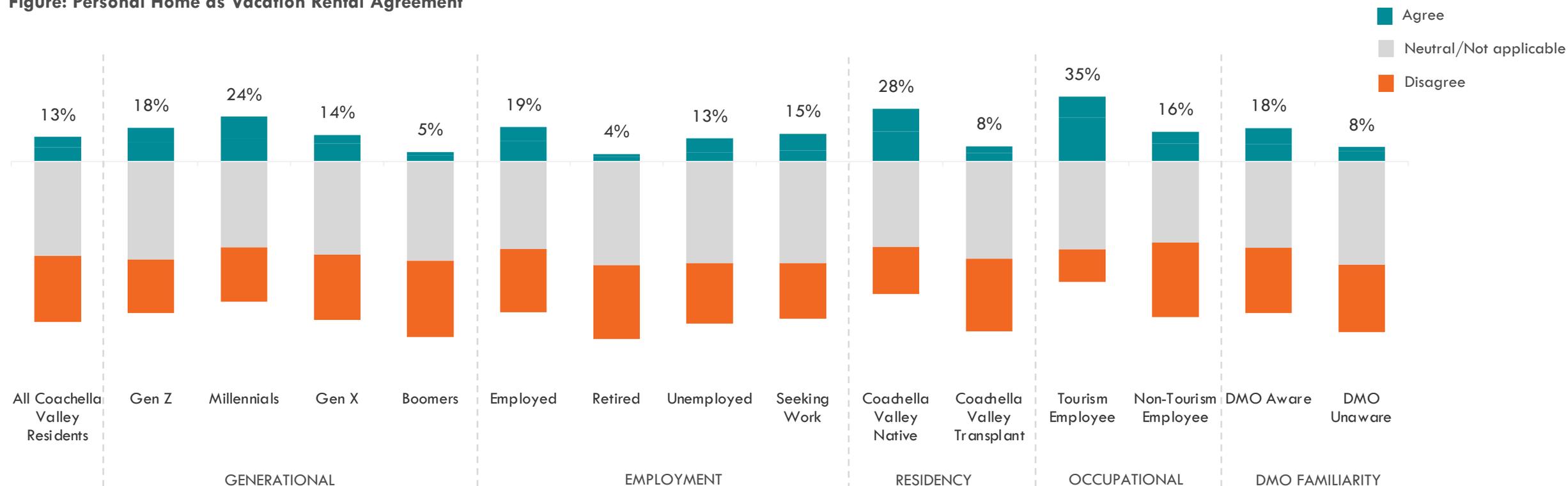


Question: How much do you agree with this statement? Well-regulated vacation rentals are good for the Coachella Valley.
 Base: All respondents. 794 completed surveys.

USE OF PERSONAL HOME AS VACATION RENTAL

Only 13 percent of residents agreed that they have personally rented their home to visitors as a vacation rental. This was significantly higher among Tourism Employees (35%), Coachella Valley Natives (28%), and Millennials (24%).

Figure: Personal Home as Vacation Rental Agreement



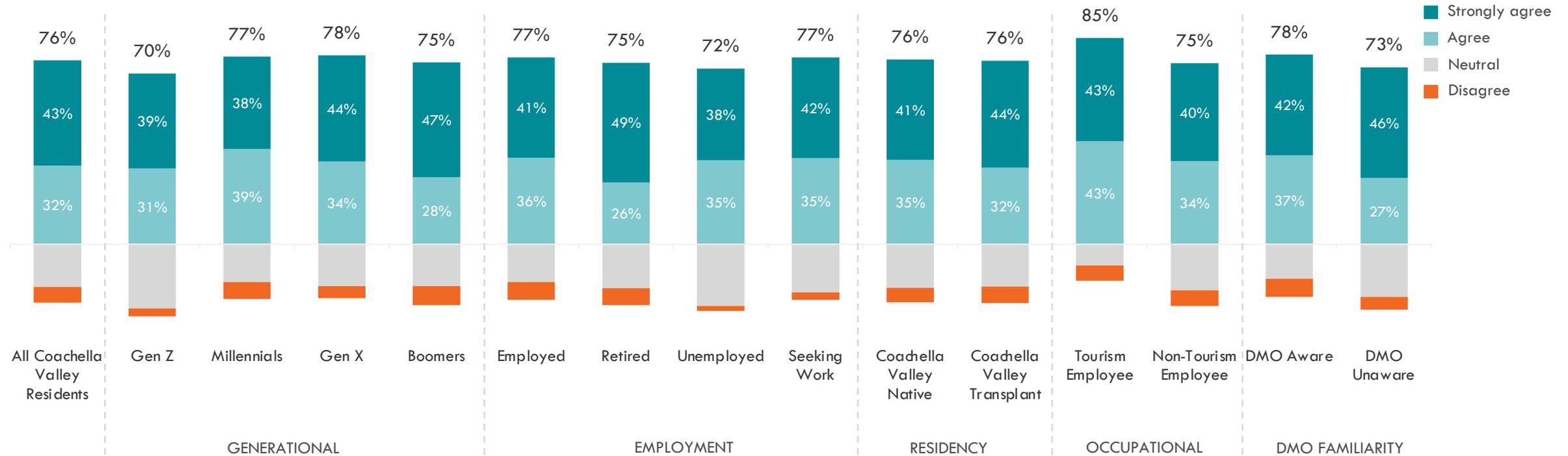
Question: How much do you agree with this statement? I have personally rented my home to visitors as a vacation rental.

Base: All respondents. 800 completed surveys.

OPINION OF VACATION RENTAL VISITORS' IMPACT

Residents had a mostly positive opinion of vacation rental visitors' economic impact, with 76 percent agreeing that these types of visitors support local businesses and services. Tourism Employees were +10 percentage points more likely to agree compared to overall residents, whereas Gen Z residents were -5 percentage points less likely.

Figure: Vacation Rental Visitors Support the Local Economy Agreement



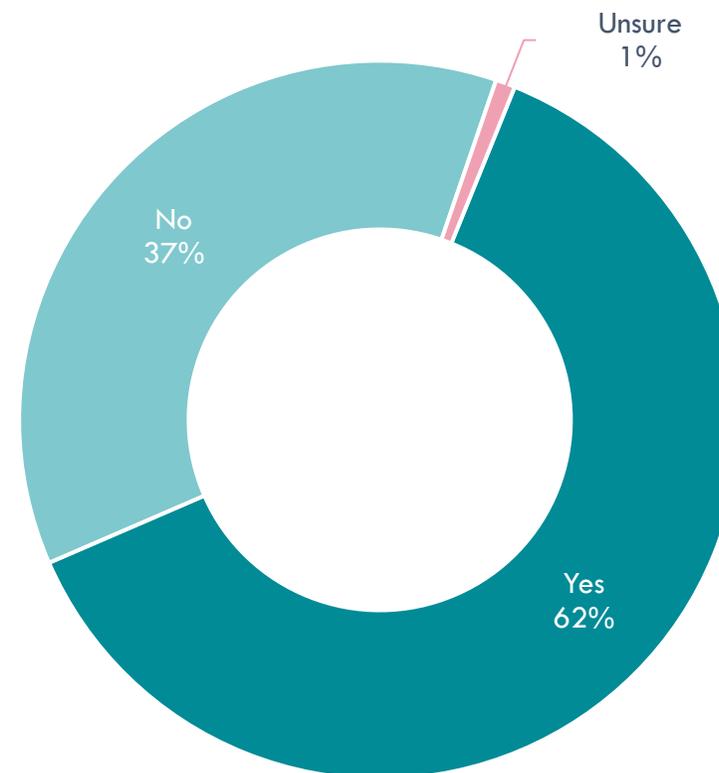
Question: How much do you agree with this statement vacation rental visitors support local businesses and city services.
 Base: All respondents. 790 completed surveys.

AIRPORT PERCEPTIONS

PSP AIRPORT TRAVEL IN THE LAST 5 YEARS

Nearly two-thirds (62%) of residents reported flying in or out of the Palm Springs International Airport over the last 5 years. This was highest among Boomers (74%) and Retirees (72%), and lowest among residents who are Unemployed (32%), Gen Z (38%), and/or Seeking Work (39%).

Figure: PSP Airport Travel in the Last 5 Years

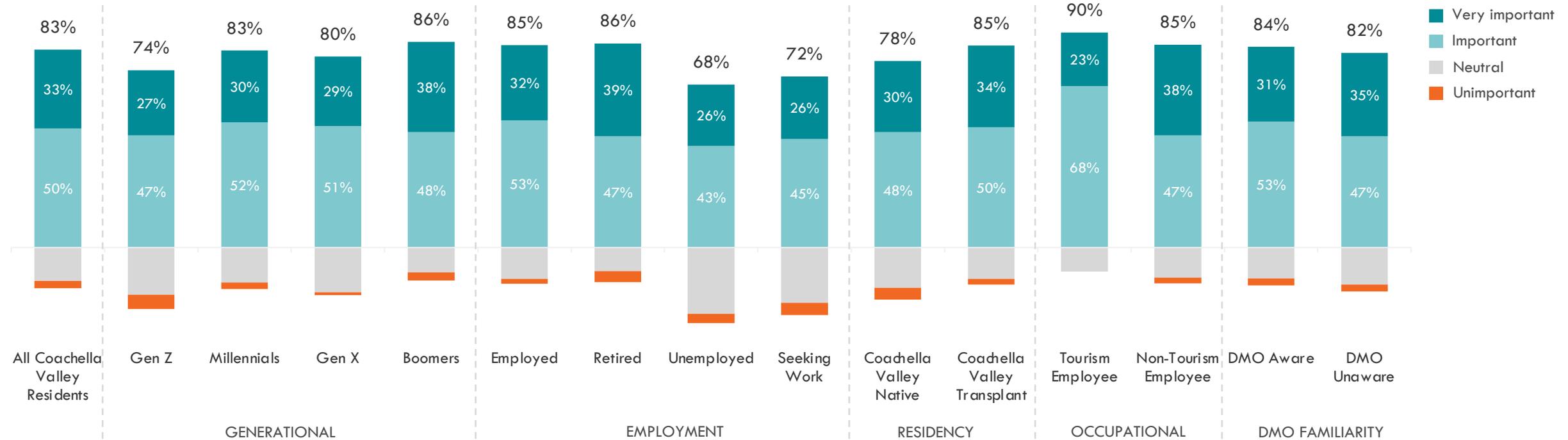


Question: Have you flown in to (or out of) the Palm Springs International Airport (PSP) in the last 5 years? Base: All respondents. 800 completed surveys.

IMPORTANCE OF PSP FLIGHT ROUTE EXPANSIONS

The majority (83%) of residents said that it is important or very important that Palm Springs International Airport (PSP) continue to expand its flight route offerings. This was highest among Tourism Employees (90%). However, this segment was also the least likely (23%) to say that this was very important to them. Residents who are Unemployed (68%), Seeking Work (72%), and/or Gen Z (74%) were least likely to say that PSP flight route expansions are important to them.

Figure: Importance of PSP Flight Route Expansions



Question: How important is it to you that the Palm Springs International Airport (PSP) continue to expand its flight route offerings?
 Base: All respondents. 790 completed surveys.



DEMOGRAPHICS

DEMOGRAPHICS

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
N =	800	66	218	167	349	451	245	104	100	204	596	80	249	431	369
Gender															
Female	57%	61%	60%	67%	51%	57%	51%	74%	66%	62%	56%	59%	54%	53%	62%
Male	42%	39%	39%	33%	49%	43%	49%	25%	34%	38%	44%	41%	45%	47%	37%
Non-Binary	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%
Other	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Generation															
Boomers	44%	0%	0%	0%	100%	22%	96%	13%	12%	4%	57%	13%	23%	49%	37%
Gen X	21%	0%	0%	100%	0%	27%	3%	35%	28%	18%	22%	25%	28%	22%	19%
Millennials	27%	0%	100%	0%	0%	41%	0%	33%	35%	55%	18%	49%	41%	22%	33%
Gen Z	8%	100%	0%	0%	0%	10%	1%	20%	25%	23%	3%	14%	8%	6%	10%
Mean	51.6	22.6	33.6	49.2	69.4	44.3	70.0	39.7	38.0	35.1	57.2	40.2	44.7	54.2	48.4
Marital Status															
Married	46%	8%	46%	50%	51%	46%	55%	25%	18%	45%	46%	53%	50%	49%	42%
Single	37%	88%	39%	29%	30%	37%	28%	56%	64%	45%	34%	29%	35%	34%	40%
Domestic Partnership	10%	3%	12%	13%	10%	12%	7%	9%	7%	7%	12%	14%	12%	11%	10%
Other	7%	2%	4%	8%	9%	4%	10%	11%	11%	4%	8%	4%	3%	6%	8%
Children in Household															
Under 18	26%	36%	56%	31%	3%	36%	2%	37%	32%	58%	15%	53%	36%	25%	26%

DEMOGRAPHICS

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
N =	800	66	218	167	349	451	245	104	100	204	596	80	249	431	369
Race															
Caucasian	68%	18%	43%	67%	93%	60%	93%	42%	35%	35%	79%	52%	63%	75%	59%
Asian, Pacific Islander	4%	6%	7%	5%	1%	7%	1%	0%	3%	6%	4%	6%	8%	4%	4%
Black, African-American	3%	8%	2%	5%	1%	3%	2%	2%	2%	4%	2%	10%	2%	2%	3%
Native American, Aleut, Eskimo	1%	2%	1%	0%	0%	1%	0%	0%	0%	1%	0%	3%	0%	0%	1%
Other	3%	2%	6%	1%	1%	3%	0%	4%	6%	2%	3%	0%	2%	2%	3%
Ethnicity															
Latino/Hispanic	22%	65%	41%	21%	3%	25%	4%	52%	54%	53%	12%	29%	24%	15%	30%
Education															
Completed graduate degree	19%	9%	12%	14%	28%	18%	26%	7%	5%	12%	21%	18%	20%	22%	15%
Some graduate school	5%	2%	6%	5%	6%	6%	5%	4%	2%	5%	6%	6%	6%	7%	4%
College graduate	30%	20%	30%	33%	30%	31%	33%	16%	17%	28%	30%	25%	36%	30%	29%
Some college	28%	30%	27%	29%	28%	27%	27%	36%	37%	27%	29%	28%	23%	26%	30%
High school graduate	15%	33%	20%	17%	7%	15%	8%	31%	33%	25%	12%	21%	14%	13%	18%
Some high school or less	3%	6%	5%	1%	1%	2%	1%	7%	5%	4%	2%	3%	1%	2%	4%

APPENDIX

QUALITY OF LIFE

TOURISM'S IMPACT ON QUALITY OF LIFE *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	94%	82%	91%	94%	98%	91%	99%	92%	85%	89%	95%	92%	91%	96%	92%
Strongly agree	67%	37%	63%	67%	76%	64%	76%	63%	60%	58%	71%	68%	63%	71%	63%
Agree	26%	45%	28%	26%	22%	28%	23%	29%	25%	32%	25%	25%	28%	25%	29%
Neutral (neither agree nor disagree)	5%	13%	8%	4%	2%	6%	1%	7%	13%	8%	4%	5%	7%	3%	7%
Disagree	1%	5%	1%	1%	0%	2%	0%	0%	1%	2%	1%	3%	2%	1%	1%
Strongly disagree	0%	0%	0%	1%	0%	0%	0%	1%	1%	0%	1%	0%	0%	1%	0%
Bottom 2 Box	1%	5%	1%	2%	0%	2%	0%	1%	2%	2%	1%	3%	2%	1%	1%

Question: How much do you agree with this statement? Tourism makes Coachella Valley a better place to live. Base: All respondents. 795 completed surveys.

TOP COACHELLA VALLEY INDUSTRIES BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Tourism	56%	21%	43%	57%	69%	52%	66%	47%	36%	38%	62%	51%	56%	60%	51%
Restaurants	30%	29%	34%	31%	27%	33%	27%	23%	25%	30%	30%	32%	31%	29%	31%
Agriculture	25%	17%	26%	25%	26%	24%	27%	25%	24%	24%	26%	19%	24%	25%	25%
Hospitality	19%	13%	18%	18%	20%	20%	17%	17%	18%	14%	20%	26%	20%	23%	14%
Healthcare	19%	8%	20%	24%	17%	19%	17%	20%	21%	15%	20%	21%	19%	21%	16%
Golf	16%	12%	10%	19%	19%	15%	22%	7%	5%	10%	18%	19%	14%	18%	14%
Retail	16%	8%	18%	16%	16%	15%	16%	18%	20%	14%	16%	19%	16%	15%	17%
Casinos	13%	4%	10%	14%	16%	12%	16%	12%	10%	6%	15%	12%	14%	13%	14%
Entertainment	8%	8%	7%	9%	8%	9%	8%	3%	8%	3%	9%	9%	8%	9%	6%
Cannabis	8%	12%	12%	8%	5%	10%	4%	9%	10%	7%	8%	9%	8%	8%	8%
Festivals	8%	12%	12%	9%	4%	7%	7%	12%	13%	14%	6%	12%	7%	7%	9%
Sports	7%	6%	5%	6%	9%	6%	11%	2%	4%	3%	8%	7%	4%	9%	5%
Education	6%	8%	8%	3%	7%	6%	6%	10%	9%	11%	5%	6%	7%	8%	5%
Real Estate	6%	6%	8%	5%	5%	6%	5%	8%	3%	6%	6%	10%	5%	6%	6%
Construction	6%	8%	10%	6%	3%	8%	2%	4%	9%	13%	4%	9%	9%	7%	4%
Solar/Wind Power	4%	4%	3%	6%	4%	4%	5%	3%	1%	2%	4%	3%	4%	3%	5%
Water	3%	13%	5%	1%	0%	3%	0%	5%	8%	6%	2%	1%	4%	2%	4%
Outdoor Recreation	3%	0%	2%	2%	4%	2%	5%	1%	0%	1%	3%	3%	1%	3%	2%
Arts & Culture	2%	4%	2%	3%	2%	2%	3%	1%	1%	3%	2%	3%	1%	3%	2%
Automotive	2%	2%	4%	3%	1%	2%	1%	5%	5%	2%	2%	3%	2%	3%	2%
Landscaping	2%	4%	2%	2%	1%	2%	2%	2%	3%	2%	2%	3%	1%	2%	1%
Government	1%	0%	1%	1%	1%	1%	1%	0%	0%	1%	1%	0%	3%	1%	1%
Housing	1%	2%	0%	1%	1%	0%	2%	2%	2%	1%	1%	0%	0%	1%	1%
Gaming	1%	0%	1%	1%	1%	1%	1%	1%	0%	1%	1%	1%	0%	1%	1%
Amazon	1%	0%	1%	1%	1%	1%	1%	0%	0%	1%	1%	3%	1%	1%	1%
Manufacturing	1%	2%	2%	1%	0%	1%	0%	0%	0%	2%	1%	0%	3%	1%	1%
LGTBQ+ Activities	1%	0%	0%	4%	0%	1%	0%	0%	1%	0%	1%	0%	1%	1%	0%
Air Conditioning	1%	2%	1%	1%	1%	1%	1%	0%	0%	1%	1%	1%	1%	0%	2%
Banking	1%	2%	1%	0%	1%	0%	1%	0%	0%	1%	1%	3%	0%	1%	1%

Question: In your opinion, what are the Coachella Valley area's most important industries? Please rank the five industries that come to mind beginning with the most important.

You may list as many as five (5) industries. Base: All respondents. 738 completed surveys.

OPINION OF VISITOR VOLUME BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	28%	36%	39%	31%	19%	33%	20%	26%	25%	46%	22%	46%	35%	29%	27%
Strongly agree	9%	12%	16%	10%	5%	13%	4%	8%	9%	17%	7%	23%	13%	12%	7%
Agree	19%	24%	23%	20%	15%	21%	16%	19%	16%	28%	16%	24%	22%	17%	20%
Neutral (neither agree nor disagree)	37%	41%	36%	35%	39%	35%	41%	39%	40%	35%	38%	25%	32%	35%	40%
Disagree	25%	20%	20%	23%	31%	21%	31%	28%	26%	14%	29%	23%	20%	26%	25%
Strongly disagree	9%	3%	6%	12%	11%	11%	8%	6%	8%	5%	10%	6%	12%	10%	8%
Bottom 2 Box	35%	23%	26%	35%	42%	32%	39%	34%	34%	20%	40%	29%	33%	36%	33%

Question: How much do you agree with this statement? Coachella Valley has too many visitors. Base: All respondents. 796 completed surveys.

HEAVY TOURISM PERIODS BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Winter Season	64%	71%	53%	60%	79%	59%	79%	67%	58%	47%	76%	37%	66%	62%	67%
Spring Season	43%	38%	42%	56%	36%	46%	35%	41%	38%	39%	46%	50%	42%	49%	35%
During certain events	43%	50%	35%	48%	46%	35%	46%	81%	77%	30%	52%	29%	36%	39%	48%
During holidays	36%	38%	37%	40%	30%	35%	35%	41%	35%	28%	41%	32%	36%	37%	34%
Fall Season	36%	46%	31%	48%	28%	36%	31%	41%	35%	31%	39%	39%	34%	37%	35%
Weekends	28%	29%	30%	29%	24%	29%	27%	22%	12%	26%	29%	32%	28%	31%	24%
Summer Season	13%	13%	25%	12%	0%	17%	2%	11%	23%	25%	5%	18%	20%	16%	10%
All the time	9%	17%	8%	4%	12%	9%	10%	7%	12%	12%	8%	13%	8%	9%	10%

Question: When does Coachella Valley have too many visitors (or congestion caused by tourism)? (Select all that apply)

Base: All respondents who agreed that Coachella Valley has too many visitors. 226 completed surveys.

HEAVY TOURISM AREAS *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Palm Springs	76%	53%	78%	78%	77%	72%	84%	79%	82%	72%	78%	57%	77%	73%	78%
Palm Desert	43%	47%	45%	35%	45%	42%	47%	38%	41%	42%	43%	48%	38%	44%	41%
La Quinta	35%	58%	35%	33%	29%	38%	29%	29%	32%	36%	34%	30%	38%	28%	44%
Indio	33%	63%	34%	35%	23%	35%	27%	38%	36%	42%	28%	30%	30%	31%	36%
Coachella	19%	32%	22%	22%	10%	21%	9%	25%	27%	28%	13%	39%	18%	18%	20%
Rancho Mirage	14%	5%	14%	20%	11%	15%	11%	13%	18%	13%	14%	4%	19%	9%	20%
Cathedral City	11%	11%	15%	11%	6%	12%	9%	8%	14%	15%	8%	9%	13%	7%	16%
Indian Wells	10%	5%	12%	13%	8%	10%	9%	17%	14%	11%	10%	4%	10%	11%	9%
Highway 111	6%	5%	3%	2%	13%	2%	18%	8%	9%	3%	8%	0%	3%	10%	1%
Joshua Tree	4%	5%	5%	4%	3%	5%	2%	4%	0%	3%	5%	9%	5%	5%	3%
El Paseo	4%	0%	6%	2%	3%	2%	4%	8%	5%	3%	4%	4%	1%	4%	3%
Thousand Palms	2%	11%	0%	2%	0%	2%	0%	0%	0%	0%	3%	9%	0%	3%	0%
Yucca Valley	2%	5%	0%	4%	0%	1%	0%	8%	5%	1%	2%	0%	1%	0%	3%
All	2%	0%	3%	0%	3%	3%	0%	0%	0%	3%	2%	0%	3%	2%	2%

Question: Which local neighborhoods or areas do you feel have too many visitors (or congestion caused by tourism)? (Write in up to five neighborhoods or areas)

Base: All respondents who agreed that Coachella Valley has too many visitors. 192 completed surveys.

PERCEPTION OF VISITORS BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
People	35%	20%	32%	41%	38%	30%	40%	46%	32%	26%	38%	30%	29%	36%	34%
Art festivals	28%	35%	35%	33%	19%	32%	16%	35%	38%	36%	25%	34%	31%	25%	31%
Sports	21%	14%	16%	16%	28%	21%	29%	4%	11%	13%	24%	26%	21%	22%	20%
Climate	15%	8%	12%	13%	20%	15%	18%	11%	8%	8%	18%	9%	15%	14%	17%
Good accommodations	15%	6%	15%	15%	15%	15%	16%	11%	15%	11%	16%	13%	18%	15%	14%
Traffic and transportation	14%	14%	13%	16%	14%	13%	15%	16%	21%	14%	14%	15%	12%	15%	13%
Cuisine	14%	23%	9%	16%	14%	14%	14%	12%	14%	13%	14%	18%	14%	14%	13%
Money and business	13%	9%	13%	11%	15%	13%	16%	10%	13%	13%	13%	18%	10%	15%	11%
Local scenery and nature	12%	15%	16%	12%	8%	14%	9%	9%	9%	14%	11%	11%	15%	14%	9%
Popular tourist locations	9%	18%	13%	5%	6%	10%	6%	12%	11%	17%	6%	9%	10%	7%	10%
Gambling	6%	2%	6%	8%	5%	6%	6%	8%	7%	4%	7%	4%	7%	6%	6%
Pleasant atmosphere	6%	5%	8%	7%	4%	7%	3%	6%	6%	5%	6%	11%	5%	6%	5%
Busy	5%	2%	4%	4%	7%	4%	7%	6%	6%	3%	6%	5%	4%	5%	5%
Parties	5%	5%	2%	6%	6%	5%	5%	5%	2%	2%	6%	3%	5%	6%	4%
Adventure	4%	5%	6%	2%	3%	5%	4%	0%	2%	5%	4%	9%	4%	4%	4%
Art and culture	4%	5%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%
Shopping	3%	3%	2%	2%	4%	3%	4%	2%	2%	2%	3%	3%	2%	3%	3%
Local museums	3%	9%	6%	1%	1%	4%	0%	2%	5%	7%	1%	4%	5%	3%	3%
City life	3%	8%	5%	1%	1%	4%	1%	1%	2%	6%	2%	4%	3%	3%	2%
Unpleasant place	3%	2%	5%	2%	2%	3%	2%	4%	6%	3%	3%	3%	3%	2%	4%
Activities	2%	0%	2%	1%	4%	2%	2%	2%	3%	0%	3%	0%	1%	2%	3%
Romance	2%	0%	3%	3%	2%	3%	2%	1%	2%	0%	3%	1%	3%	2%	2%
History	1%	2%	2%	1%	1%	2%	0%	1%	1%	3%	1%	4%	1%	2%	1%
Safety concerns	1%	2%	0%	2%	1%	1%	2%	1%	1%	0%	1%	0%	1%	1%	1%
Airbnb	1%	0%	2%	0%	0%	1%	0%	0%	0%	1%	1%	0%	2%	0%	2%
Housing	1%	2%	0%	0%	1%	1%	0%	1%	0%	0%	1%	0%	1%	0%	1%

Question: Let's now focus on the tourism industry. When you think of visitors in the Coachella Valley area, what first comes to mind? (Write in up to three (3) things)

Base: All respondents. 800 completed surveys.

COACHELLA VALLEY ISSUES THAT NEED MORE SUPPORT

BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Homelessness	77%	71%	73%	81%	77%	76%	76%	81%	80%	71%	79%	69%	76%	77%	76%
Affordable Housing	67%	83%	70%	66%	63%	68%	61%	78%	83%	73%	65%	70%	68%	67%	67%
Sustainability	35%	39%	39%	30%	35%	38%	32%	31%	35%	34%	36%	33%	42%	35%	36%
Transportation	28%	29%	24%	22%	34%	27%	34%	20%	25%	24%	30%	26%	27%	27%	30%
Other	5%	2%	4%	2%	7%	4%	7%	3%	4%	1%	6%	1%	3%	4%	5%

Question: Which of the following issues need more support in the Coachella Valley? (Select all that apply) Base: All respondents. 800 completed surveys.

COACHELLA VALLEY SUGGESTIONS FOR IMPROVEMENT

BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Help the homeless	19%	16%	18%	16%	21%	15%	23%	25%	16%	15%	20%	14%	13%	19%	18%
Improve transportation	16%	9%	16%	14%	18%	15%	17%	17%	23%	11%	17%	13%	15%	18%	14%
Lower costs	15%	14%	19%	15%	13%	17%	13%	8%	13%	18%	14%	21%	20%	14%	16%
More activities	9%	18%	8%	13%	5%	11%	4%	8%	10%	15%	7%	14%	12%	9%	9%
Safety and hygiene	7%	7%	6%	8%	7%	6%	7%	7%	6%	4%	8%	10%	5%	6%	8%
Environment-friendliness	5%	7%	2%	2%	8%	3%	10%	1%	2%	3%	6%	0%	5%	4%	6%
Treat the locals better	4%	5%	6%	4%	2%	5%	2%	4%	2%	5%	4%	2%	5%	3%	4%
New businesses to patronize	3%	2%	3%	3%	4%	3%	4%	2%	1%	4%	3%	2%	3%	3%	4%
Preserve small-town atmosphere	2%	2%	1%	2%	4%	2%	3%	2%	2%	1%	3%	2%	2%	2%	2%
Sustainable growth	2%	2%	4%	1%	2%	3%	2%	1%	2%	4%	2%	5%	2%	3%	1%
Improve accommodations	2%	0%	2%	2%	2%	2%	0%	3%	2%	2%	2%	5%	2%	2%	2%
Better event/tourist management	2%	5%	2%	1%	1%	1%	1%	4%	3%	4%	1%	3%	1%	1%	3%
Communication with the community	2%	5%	1%	2%	1%	2%	1%	2%	2%	3%	1%	0%	3%	2%	2%
More activities for the young	2%	2%	2%	2%	2%	1%	2%	3%	3%	2%	2%	2%	1%	2%	2%
Political overhaul	2%	0%	2%	1%	3%	2%	2%	0%	0%	1%	2%	0%	3%	2%	2%
Better healthcare options	1%	4%	0%	1%	2%	1%	2%	3%	3%	1%	2%	0%	0%	2%	0%
More jobs	1%	0%	0%	3%	2%	1%	1%	3%	2%	1%	2%	2%	1%	2%	1%
Advertise points of interest	1%	0%	1%	2%	1%	1%	1%	2%	2%	2%	1%	2%	1%	1%	1%
Improve hospitality	1%	2%	2%	1%	0%	2%	0%	0%	2%	2%	1%	2%	2%	1%	2%
Restore old town features	1%	0%	2%	2%	1%	2%	0%	0%	0%	1%	1%	2%	1%	1%	1%
Accessibility	1%	0%	1%	1%	1%	1%	1%	1%	0%	1%	1%	0%	1%	1%	2%
Improve housing	1%	0%	2%	0%	1%	1%	1%	1%	1%	1%	1%	2%	0%	1%	1%
Improve infrastructure	1%	0%	1%	1%	0%	1%	1%	0%	0%	1%	1%	0%	1%	1%	1%

ECONOMIC IMPACT OF TOURISM

TOURISM'S ECONOMIC IMPACT *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	98%	95%	97%	95%	100%	97%	100%	96%	95%	95%	98%	98%	97%	98%	97%
Very important	78%	53%	71%	81%	86%	75%	88%	69%	70%	65%	83%	83%	72%	83%	73%
Important	19%	42%	25%	14%	13%	22%	11%	27%	25%	30%	15%	15%	25%	15%	24%
Neither important nor unimportant	2%	5%	2%	2%	0%	2%	0%	2%	2%	3%	1%	0%	2%	1%	2%
Unimportant	0%	0%	1%	0%	0%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%
Very unimportant	1%	0%	0%	2%	0%	1%	0%	1%	2%	1%	0%	1%	0%	0%	1%
Bottom 2 Box	1%	0%	1%	2%	0%	1%	0%	2%	3%	1%	1%	3%	0%	1%	1%

Question: How important is the tourism industry to the vitality of the Coachella Valley's economy? Base: All respondents. 794 completed surveys.

TOURISM'S REVENUE IMPORTANCE *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	94%	82%	91%	94%	98%	91%	99%	92%	85%	89%	95%	92%	91%	96%	92%
Very important	67%	37%	63%	67%	76%	64%	76%	63%	60%	58%	71%	68%	63%	71%	63%
Important	26%	45%	28%	26%	22%	28%	23%	29%	25%	32%	25%	25%	28%	25%	29%
Neither important nor unimportant	5%	13%	8%	4%	2%	6%	1%	7%	13%	8%	4%	5%	7%	3%	7%
Unimportant	1%	5%	1%	1%	0%	2%	0%	0%	1%	2%	1%	3%	2%	1%	1%
Very unimportant	0%	0%	0%	1%	0%	0%	0%	1%	1%	0%	1%	0%	0%	1%	0%
Bottom 2 Box	1%	5%	1%	2%	0%	2%	0%	1%	2%	2%	1%	3%	2%	1%	1%

Question: How important are tourism-generated revenues in paying for the Coachella Valley's government services (like police, firefighters, schools, road and repairs)?

Base: All respondents. 794 completed surveys.

SUPPORT FOR TOURISM INDUSTRY GROWTH *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	77%	70%	72%	78%	80%	78%	79%	67%	66%	71%	79%	86%	77%	80%	73%
Strongly agree	41%	32%	38%	43%	43%	43%	39%	36%	35%	39%	41%	59%	39%	47%	33%
Agree	36%	38%	34%	35%	37%	35%	40%	30%	30%	32%	37%	28%	38%	33%	40%
Neutral (neither agree nor disagree)	18%	24%	21%	17%	15%	17%	15%	27%	28%	24%	16%	13%	19%	15%	21%
Disagree	4%	3%	3%	4%	5%	3%	7%	4%	4%	3%	4%	1%	3%	3%	5%
Strongly disagree	1%	3%	3%	1%	0%	2%	0%	2%	2%	1%	1%	0%	1%	1%	1%
Bottom 2 Box	5%	6%	6%	5%	5%	5%	7%	6%	6%	5%	6%	1%	4%	5%	6%

Question: How much do you agree with this statement? I support growing Coachella Valley's tourism industry. Base: All respondents. 797 completed surveys.

INCREASED TOURISM APPRECIATION DUE TO TAX IMPACT

BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	73%	73%	72%	69%	76%	72%	75%	74%	77%	73%	74%	79%	75%	75%	71%
Strongly agree	33%	36%	33%	35%	32%	36%	28%	32%	34%	30%	34%	45%	33%	38%	28%
Agree	40%	36%	38%	34%	45%	36%	47%	42%	43%	43%	39%	34%	42%	37%	44%
Neutral (neither agree nor disagree)	22%	27%	20%	25%	21%	22%	21%	22%	21%	22%	22%	18%	20%	19%	25%
Disagree	4%	0%	7%	5%	2%	5%	2%	4%	2%	4%	4%	4%	4%	4%	3%
Strongly disagree	1%	0%	1%	1%	1%	1%	1%	0%	0%	1%	1%	0%	2%	1%	1%
Bottom 2 Box	5%	0%	8%	6%	3%	6%	3%	4%	2%	5%	5%	4%	5%	6%	4%

Question: Last year, tourism saved each COACHELLA VALLEY HOUSEHOLD \$3,970 in taxes. With this piece of information in mind, please share how much you agree with the following statement:
This statistic makes me appreciate tourism more. Base: All respondents. 791 completed surveys.

VACATION RENTALS MINDSET & BEHAVIOR

VACATION RENTAL REGULATION *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	72%	80%	70%	73%	71%	72%	70%	77%	76%	73%	72%	81%	69%	75%	69%
Strongly agree	31%	30%	32%	31%	31%	33%	27%	32%	30%	30%	31%	40%	29%	32%	30%
Agree	41%	50%	38%	42%	41%	39%	42%	46%	45%	43%	40%	41%	40%	43%	38%
Neutral (neither agree nor disagree)	18%	14%	21%	20%	15%	18%	17%	19%	22%	20%	17%	13%	19%	14%	21%
Disagree	6%	5%	6%	4%	8%	6%	7%	4%	1%	4%	7%	5%	6%	5%	7%
Strongly disagree	4%	2%	4%	4%	5%	4%	6%	0%	1%	3%	5%	1%	6%	6%	3%
Bottom 2 Box	10%	6%	9%	7%	14%	10%	14%	4%	2%	7%	12%	6%	12%	11%	10%

Question: How much do you agree with this statement? Well-regulated vacation rentals are good for the Coachella Valley.

Base: All respondents. 794 completed surveys.

USE OF PERSONAL HOME AS VACATION RENTAL

BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	13%	18%	24%	14%	5%	19%	4%	13%	15%	28%	8%	35%	16%	18%	8%
Strongly agree	8%	11%	12%	10%	3%	11%	2%	5%	6%	16%	5%	24%	10%	10%	5%
Agree	6%	8%	12%	5%	2%	8%	2%	8%	9%	12%	4%	11%	6%	9%	2%
Neutral/Not applicable	51%	53%	46%	50%	54%	47%	56%	55%	55%	46%	53%	48%	44%	47%	56%
Disagree	13%	12%	11%	17%	12%	13%	13%	12%	10%	9%	14%	10%	15%	14%	11%
Strongly disagree	23%	17%	18%	18%	30%	21%	27%	21%	20%	17%	25%	8%	25%	21%	25%
Bottom 2 Box	36%	29%	29%	35%	41%	34%	40%	33%	30%	25%	39%	18%	40%	35%	36%

Question: How much do you agree with this statement? I have personally rented my home to visitors as a vacation rental.

Base: All respondents. 800 completed surveys.

OPINION OF VACATION RENTAL VISITORS' IMPACT

BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	76%	70%	77%	78%	75%	77%	75%	72%	77%	76%	76%	85%	75%	78%	73%
Strongly agree	32%	31%	39%	34%	28%	36%	26%	35%	35%	35%	32%	43%	34%	37%	27%
Agree	43%	39%	38%	44%	47%	41%	49%	38%	42%	41%	44%	43%	40%	42%	46%
Neutral (neither agree nor disagree)	18%	27%	16%	17%	17%	16%	18%	26%	20%	18%	17%	9%	19%	14%	22%
Disagree	4%	3%	4%	2%	5%	5%	4%	1%	1%	2%	5%	6%	3%	5%	3%
Strongly disagree	3%	0%	3%	2%	3%	3%	3%	1%	2%	4%	2%	0%	3%	2%	3%
Bottom 2 Box	7%	3%	7%	5%	8%	7%	7%	2%	3%	6%	7%	6%	6%	8%	5%

Question: How much do you agree with this statement Vacation rental visitors support local businesses and city services.

Base: All respondents. 790 completed surveys.

AIRPORT PERCEPTIONS

PSP AIRPORT TRAVEL IN THE LAST 5 YEARS *BY RESIDENT SEGMENT*

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Yes	62%	38%	51%	63%	74%	64%	72%	32%	39%	47%	68%	66%	67%	71%	53%
No	37%	61%	47%	37%	26%	35%	28%	65%	60%	52%	32%	34%	32%	29%	45%
Unsure	1%	2%	2%	0%	1%	1%	0%	3%	1%	1%	1%	0%	0%	0%	2%

IMPORTANCE OF PSP FLIGHT ROUTE EXPANSIONS

BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Top 2 Box	83%	74%	83%	80%	86%	85%	86%	68%	72%	78%	85%	90%	85%	84%	82%
Very important	50%	47%	52%	51%	48%	53%	47%	43%	45%	48%	50%	68%	47%	53%	47%
Important	33%	27%	30%	29%	38%	32%	39%	26%	26%	30%	34%	23%	38%	31%	35%
Neither important nor unimportant	14%	20%	15%	19%	10%	13%	10%	28%	23%	17%	13%	10%	13%	13%	15%
Unimportant	2%	2%	2%	1%	2%	2%	2%	2%	2%	2%	1%	0%	2%	1%	2%
Very unimportant	1%	5%	0%	1%	2%	0%	3%	2%	3%	2%	1%	0%	1%	2%	1%
Bottom 2 Box	3%	6%	3%	1%	3%	2%	5%	4%	5%	5%	2%	0%	2%	3%	3%

Question: How important is it to you that the Palm Springs International Airport (PSP) continue to expand its flight route offerings?

Base: All respondents. 790 completed surveys.

DESIRED PSP DESTINATION ADDITIONS BY RESIDENT SEGMENT

	Total	Generational				Employment				Residency		Occupational		DMO Familiarity	
	Coachella Valley Residents	Gen Z	Millennials	Gen X	Boomers	Employed	Retired	Unemployed	Seeking Work	Coachella Valley Native	Coachella Valley Transplant	Tourism Employee	Non-Tourism Employee	DMO Aware	DMO Unaware
Hawaii	15%	12%	13%	19%	15%	16%	13%	17%	16%	14%	15%	10%	14%	14%	16%
New York, NY	14%	11%	16%	16%	12%	15%	12%	13%	14%	12%	15%	18%	16%	13%	16%
Mexico	10%	20%	14%	8%	6%	12%	5%	12%	14%	16%	8%	15%	13%	8%	12%
Las Vegas, NV	6%	8%	5%	8%	6%	6%	4%	10%	6%	7%	6%	4%	6%	6%	6%
Miami, FL	5%	8%	6%	4%	5%	6%	4%	5%	5%	4%	5%	3%	5%	5%	5%
Florida	5%	2%	5%	7%	5%	5%	4%	5%	5%	5%	5%	5%	4%	6%	3%
Somewhere in Europe	4%	3%	7%	5%	3%	5%	3%	7%	3%	6%	4%	3%	5%	4%	5%
Chicago, IL	4%	0%	4%	7%	3%	4%	4%	5%	3%	3%	4%	1%	4%	5%	3%
Puerta Vallarta, Mexico	4%	3%	3%	3%	5%	4%	4%	2%	1%	1%	5%	3%	4%	4%	4%
Washington, D.C.	3%	3%	3%	1%	5%	2%	6%	4%	2%	2%	4%	3%	1%	3%	4%
London, England	3%	0%	3%	2%	4%	2%	4%	4%	4%	1%	4%	4%	2%	3%	3%
Cabo San Lucas, Mexico	3%	0%	1%	4%	4%	4%	3%	0%	0%	0%	4%	3%	4%	4%	2%
Paris, France	3%	2%	2%	3%	3%	1%	4%	5%	5%	3%	2%	3%	1%	2%	3%
Boston, MA	2%	2%	1%	4%	3%	3%	2%	1%	1%	0%	3%	4%	3%	3%	2%
Italy	2%	5%	3%	2%	2%	3%	2%	3%	5%	3%	2%	0%	3%	1%	4%
San Francisco, CA	2%	6%	1%	2%	2%	2%	2%	3%	4%	2%	2%	1%	2%	2%	2%

Question: The Palm Springs International Airport (PSP) currently flies direct to 30 destinations across the United States and Canada. What destinations would you like to see added for domestic or international flights? (Write in up to three (3) destinations) Base: All respondents. 800 completed surveys.