

# Visitors to Arizona's Phoenix & Central Region

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## **Introduction**

This summary is a compilation of several sources; economic impact data from Dean Runyan Associates, visitor volume from Longwoods, profile data from Tourism Economics, visitor Visa card spending from Buxton, and online travel search and book data from nSight. Each source utilizes a different methodology; the Arizona Office of Tourism aggregates and interprets the data to create a more complete picture of the Arizona visitor. AOT utilizes this data to target potential visitors, create impactful marketing campaigns, and assist Arizona communities in marketing their destination.

# What is the economic impact of visitors to the Phoenix & Central Region?

Source: Dean Runyan Associates

## Phoenix & Central Arizona Travel Impacts, 2002-2013p

	2004	2006	2008	2010	2011	2012	2013p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	7,346	8,615	8,491	8,416	8,910	9,195	9,565
Other Travel*	1,935	2,460	2,619	2,428	2,672	2,886	3,043
Total Direct Spending	9,281	11,076	11,109	10,844	11,583	12,081	12,608
<b>Visitor Spending by Type of Accommodation (\$Million)</b>							
Hotel, Motel	3,953	4,788	4,489	4,306	4,559	4,649	4,846
Private Home	1,924	2,227	2,339	2,453	2,573	2,585	2,692
Campground	252	210	198	154	177	297	320
Vacation Home	244	283	322	334	347	356	362
Day Travel	973	1,107	1,144	1,169	1,255	1,308	1,345
Destination Spending	7,346	8,615	8,491	8,416	8,910	9,195	9,565
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	1,376	1,742	1,673	1,399	1,507	1,559	1,628
Food Service	1,589	1,818	1,828	1,962	2,056	2,143	2,246
Food Stores	263	275	294	296	318	342	356
Local Tran. & Gas	810	1,012	1,081	1,078	1,226	1,289	1,303
Arts, Ent. & Rec.	1,081	1,178	1,126	1,139	1,173	1,198	1,230
Retail Sales	1,217	1,325	1,233	1,292	1,339	1,360	1,392
Visitor Air Tran.	1,011	1,266	1,257	1,250	1,290	1,305	1,411
Destination Spending	7,346	8,615	8,491	8,416	8,910	9,195	9,565
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	998	1,166	1,248	1,213	1,274	1,320	1,375
Arts, Ent. & Rec.	467	533	533	531	537	583	625
Retail**	204	231	228	212	225	226	227
Ground Tran.	88	101	95	102	109	111	113
Visitor Air Tran.	475	565	542	560	607	593	551
Other Travel*	655	779	774	735	786	831	836
Total Direct Earnings	2,887	3,375	3,420	3,352	3,537	3,664	3,727
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	41.0	44.1	44.6	42.6	44.0	44.8	46.5
Arts, Ent. & Rec.	16.9	17.9	17.8	16.6	16.9	17.8	18.9
Retail**	6.7	7.1	7.1	6.5	6.6	6.6	6.8
Ground Tran.	2.6	2.8	2.6	2.6	2.7	2.8	2.8
Visitor Air Tran.	7.4	7.8	7.4	6.7	7.0	7.2	6.9
Other Travel*	13.1	14.5	13.6	11.8	12.1	13.0	12.4
Total Direct Employment	87.7	94.2	93.2	86.7	89.3	92.1	94.3
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	406.3	467.1	474.5	465.1	501.6	510.4	514.8
State Tax Receipts	359.6	411.6	414.9	418.4	462.8	479.7	481.1
Total Direct Gov't Revenue	765.9	878.7	889.5	883.5	964.4	990.2	995.9

Details may not add to totals due to rounding.

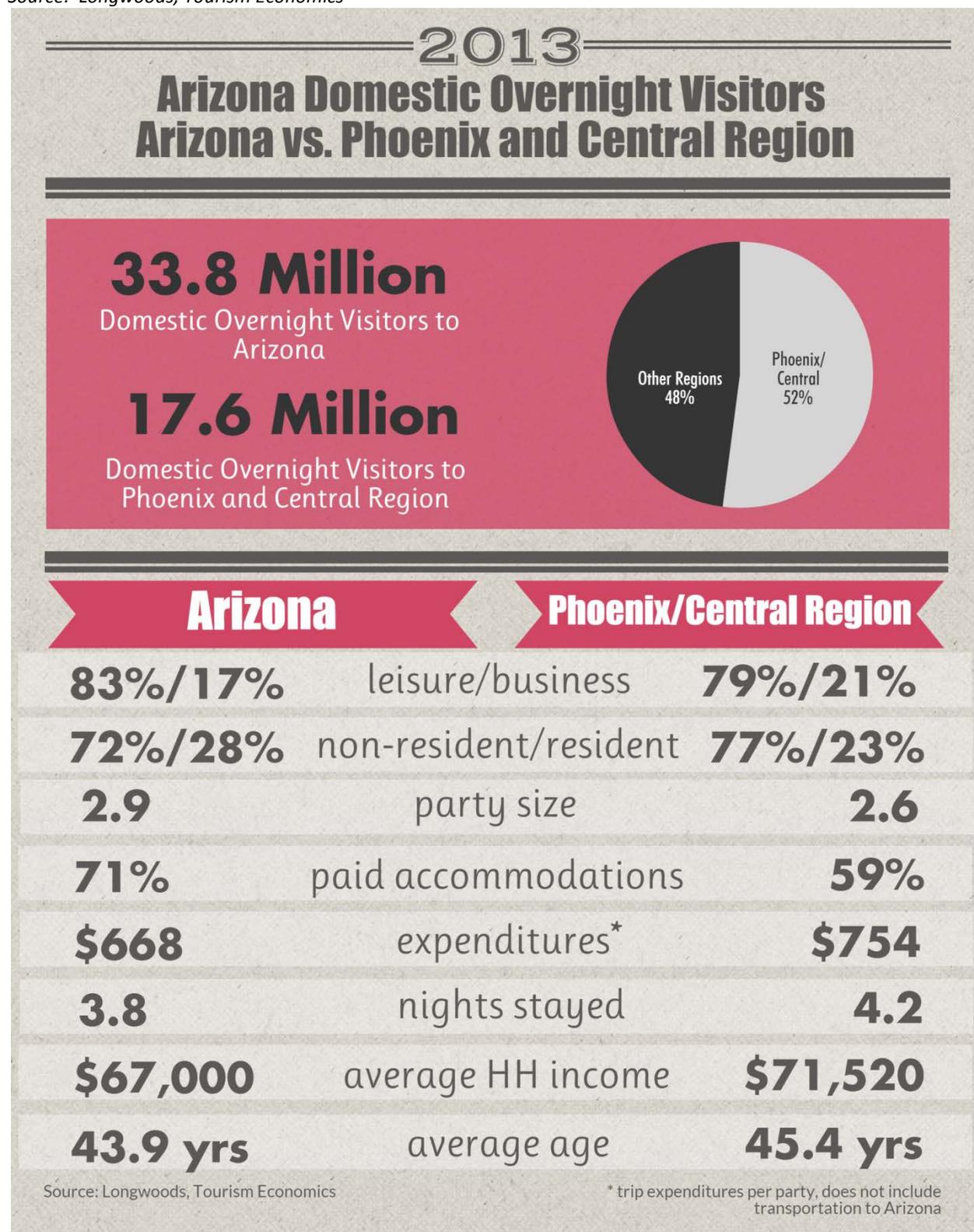
\*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

\*\*Retail includes gasoline.

Phoenix & Central Arizona includes Maricopa and Pinal counties.

## Who visits the Phoenix & Central Region?

Source: Longwoods, Tourism Economics



# Phoenix & Central Region: Visitor Profile Based on Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

## Visitor Profile:

- Age Range of 45+ (67% of spend)
- Professional Occupation/Retired (61% of spend)
- College Educated (68% of spend)
- Income level of \$50K+ (76% of spend)
- Married (72% of spend)

## Top Visitor Segments

These segments represent approximately 38% of Phoenix & Central region visitation spending. For more detailed data on the segments, visit:

<http://guides.business-strategies.co.uk/mosaicusa2011/html/animation.htm>

### 1. C11 – Aging of Aquarius

- Age: 85% are between 51-65
- Income: 65% have a household income greater than \$100,000/year
- Children in Household: less than 1%
- Travel domestically: 58%

### 2. A02 – Platinum Prosperity

- Age: 60% are between 51-65
- Income: 100% have a household income greater than \$100,000/year
- Children in Household: 4%
- Travel domestically: 64%

### 3. A01 – American Royalty

- Age: 48% are between 51-65
- Income: 87% have a household income greater than \$100,000/year
- Children in Household: 26%
- Travel domestically: 60%

### 4. Q62 – Reaping Rewards

- Age: 68% are over the age of 76
- Income: 17% have a household income greater than \$100,000/year
- Children in Household: 0.6%
- Travel domestically: 45%

### 5. C13 – Silver Sophisticates

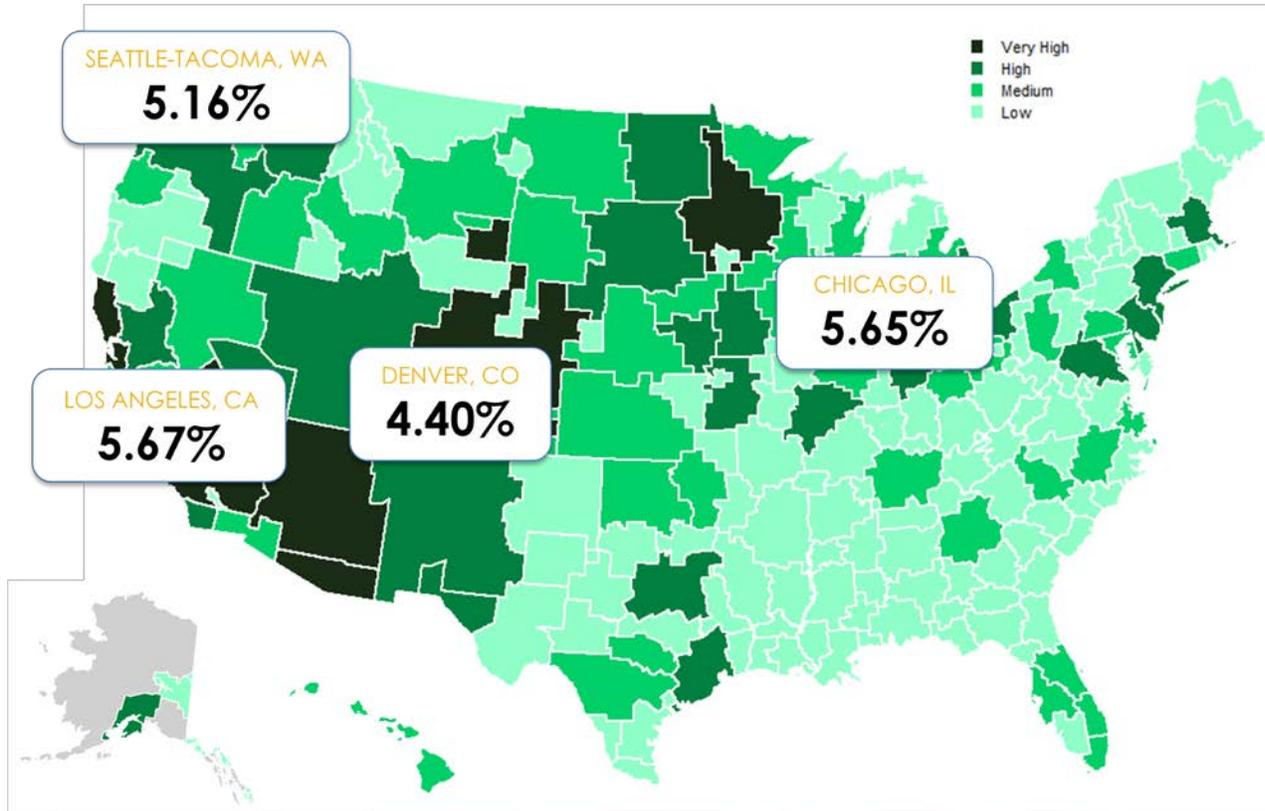
- Age: 58% are between 51-75
- Income: 49% have an income greater than \$100,000/year

- Children in Household: 3%
  - Travel domestically: 49%
- 6. B07 – Generational Soup**
- Age: 55% are between 51-65
  - Income: 68% have a household income greater than \$100,000/year
  - Children in Household: 38%
  - Travel domestically: 60%
- 7. E21 – Unspoiled Splendor**
- Age: 90% are between 51-65 years old
  - Income: 24% have a household income greater than \$100,000/year
  - Children in Household: 1.6%
  - Travel domestically: 47%
- 8. J34 – Autumn Years**
- Age: 82% are over the age of 66
  - Income: 20% have a household income greater than \$100,000/year
  - Children in Household: 2%
  - Travel domestically: 42%

# Phoenix & Central Region: Top Visitor Cities of Origin by Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

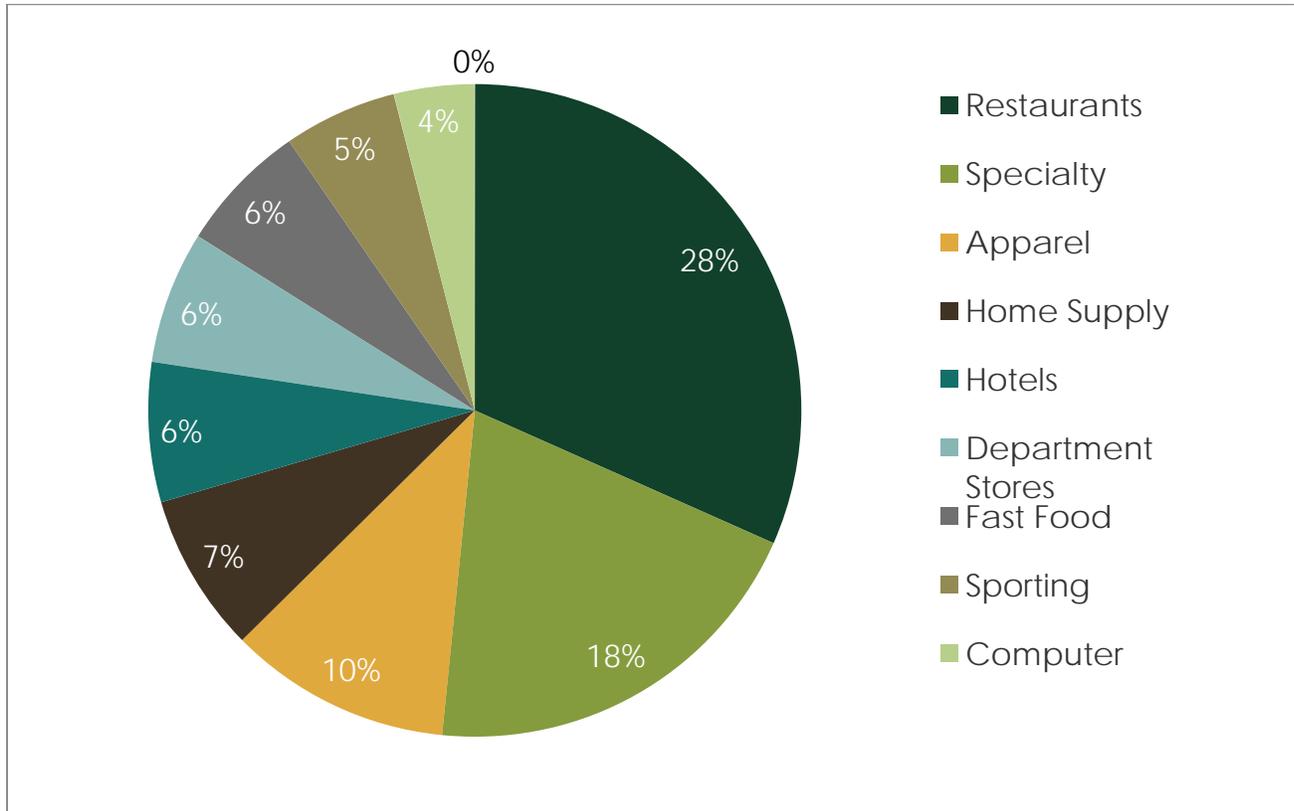


	Top DMAs	% of Spend
1	Phoenix (Prescott) AZ	13.48%
2	Los Angeles CA	5.67%
3	Chicago IL	5.65%
4	Seattle-Tacoma WA	5.16%
5	Denver CO	4.40%
6	Tucson (Sierra Vista) AZ	4.29%
7	Minneapolis-St. Paul MN	3.93%
8	San Francisco-Oakland-San Jose CA	3.83%
9	New York NY	2.35%
10	Albuquerque-Santa Fe NM	2.13%

## Phoenix & Central Region: Overall Visitor Spend by Category

Period: May 2013-April 2014

Source: Buxton



### Share of Spending on Hotels from Top Source Markets:

Of the top ten source markets, what percentage of the total expenditure is for overnight accommodation?

	Top DMAs	% of Spend on Hotels
1	Phoenix (Prescott) AZ	1.6%
2	Los Angeles CA	10.3%
3	Chicago IL	7.6%
4	Seattle-Tacoma WA	5.9%
5	Denver CO	8.5%
6	Tucson (Sierra Vista) AZ	6.1%
7	Minneapolis-St. Paul MN	5.7%
8	San Francisco-Oakland-San Jose CA	11.1%
9	New York NY	9.3%
10	Albuquerque-Santa Fe NM	8.0%

# Phoenix & Central Region: Where are visitors searching from?

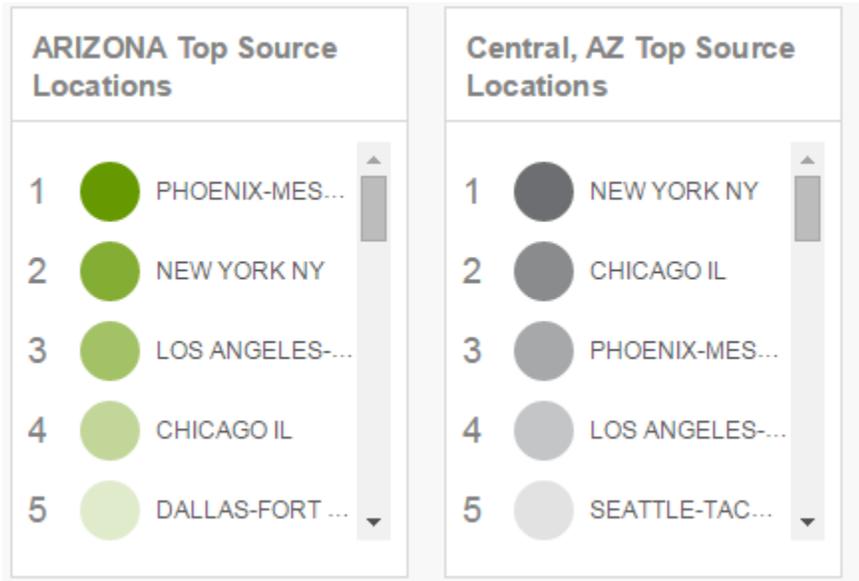
Period: May 2013-April 2014 (Travel Date)

Source: nSight

## Top Ten Source Locations for

### Phoenix & Central Region:

1. Phoenix-Mesa, AZ
2. New York, NY
3. Los Angeles-Riverside-Orange County, CA
4. Dallas-Fort Worth, TX
5. Nuremberg, DE
6. Lubeck, DE
7. Chicago, IL
8. Sao Paulo, BR
9. Seattle-Tacoma, WA
10. Milan, IT



## Search to Stay Trend

The average number of days from the time a visitor begins searching to the time they arrive at the destination.

