

Visitors to Arizona's Tucson & Southern Region

Prepared by
Arizona Office of Tourism
Research Division



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 Tucson & Southern Region?

Source: Dean Runyan Associates

Tucson & Southern Arizona Travel Impacts, 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	2,609	2,883	2,719	2,671	2,667	2,771	2,799
Other Travel*	406	497	555	510	571	655	585
Total Direct Spending	3,015	3,380	3,274	3,181	3,238	3,426	3,384
Visitor Spending by Type of Accommodation (\$Million)							
Hotel, Motel	1,075	1,262	1,114	1,097	1,093	1,118	1,128
Private Home	468	528	569	575	597	600	590
Campground	35	67	49	42	45	46	46
Vacation Home	46	51	56	56	59	60	60
Day Travel	986	975	932	901	874	947	974
Destination Spending	2,609	2,883	2,719	2,671	2,667	2,771	2,799
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	392	487	428	391	388	394	397
Food Service	592	658	616	652	651	682	699
Food Stores	299	287	290	274	265	289	302
Local Tran. & Gas	286	362	364	355	393	411	403
Arts, Ent. & Rec.	207	224	209	211	210	212	211
Retail Sales	663	656	590	584	557	585	597
Visitor Air Tran.	170	210	223	204	203	199	190
Destination Spending	2,609	2,883	2,719	2,671	2,667	2,771	2,799
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	341	385	383	375	385	410	416
Arts, Ent. & Rec.	87	98	95	94	92	93	94
Retail**	134	137	131	117	113	116	116
Ground Tran.	27	30	25	27	28	29	29
Visitor Air Tran.	5	10	12	11	10	9	7
Other Travel*	52	57	63	53	55	83	60
Total Direct Earnings	647	717	708	677	682	740	722
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	17.7	18.7	16.9	16.4	16.5	17.2	17.3
Arts, Ent. & Rec.	5.8	6.0	5.4	5.5	5.4	5.4	5.5
Retail**	5.2	5.1	4.8	4.1	4.0	4.0	4.0
Ground Tran.	0.8	0.8	0.7	0.7	0.7	0.7	0.7
Visitor Air Tran.	0.1	0.2	0.2	0.2	0.2	0.2	0.1
Other Travel*	1.9	1.9	2.0	1.5	1.4	2.1	1.8
Total Direct Employment	31.5	32.7	30.0	28.4	28.3	29.6	29.5
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	120.0	135.8	134.9	128.5	130.7	134.3	130.3
State Tax Receipts	124.5	136.9	130.1	131.4	138.2	144.3	140.0
Total Direct Gov't Revenue	244.6	272.7	265.0	259.9	268.9	278.5	270.3

Details may not add to totals due to rounding.

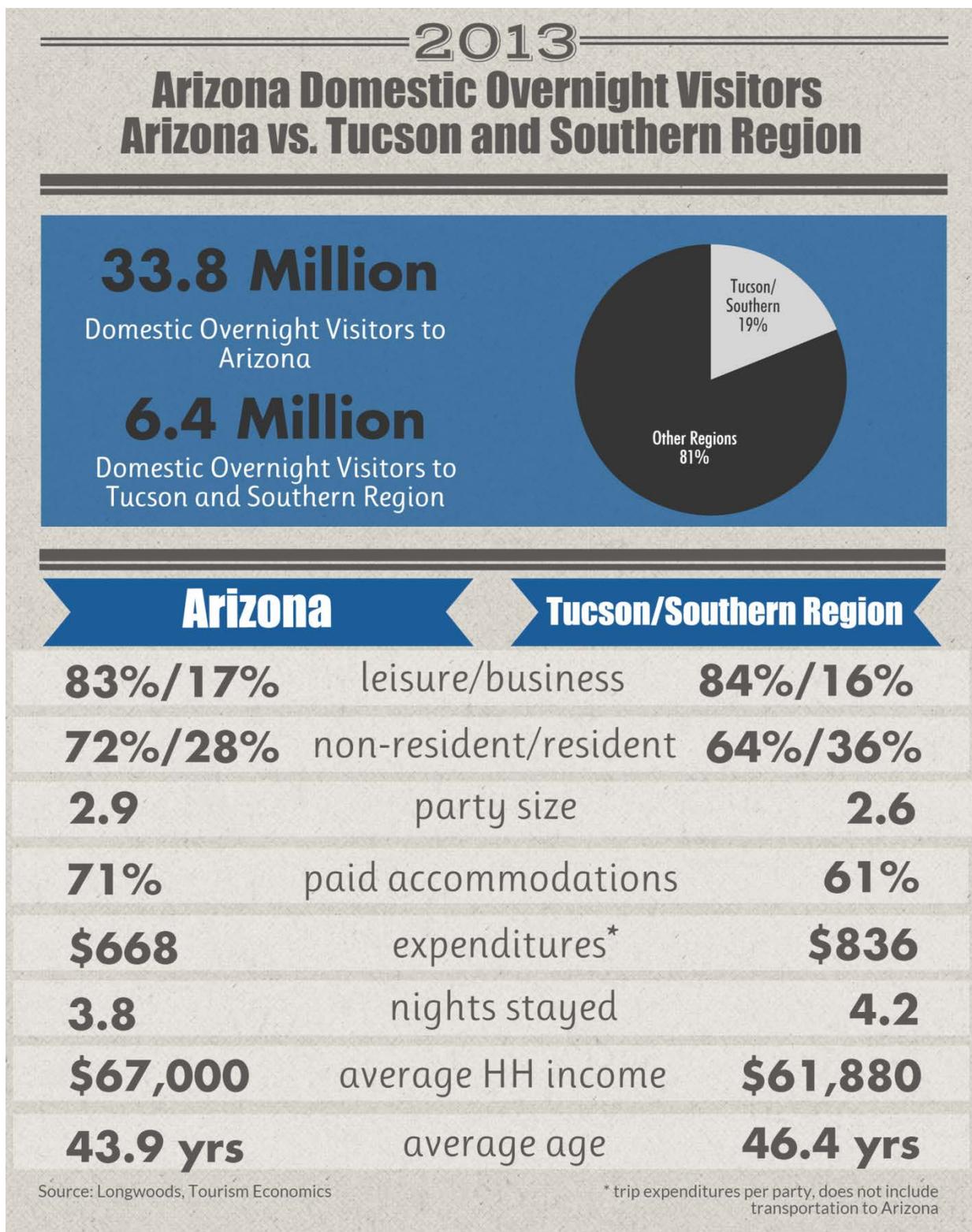
*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

**Retail includes gasoline.

Tucson & Southern Arizona includes Cochise, Graham, Greenlee, Pima and Santa Cruz counties.

Who visits the Tucson & Southern Region?

Source: Longwoods, Tourism Economics



Tucson & Southern 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 (48% of spend)
- College Educated (67% of spend)
- Income level of \$50K+ (65% of spend)
- Married (68% of spend)

Top Visitor Segments

These segments represent approximately 38% of the Tucson & Southern 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. 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%

5. B07 – Generational Soup

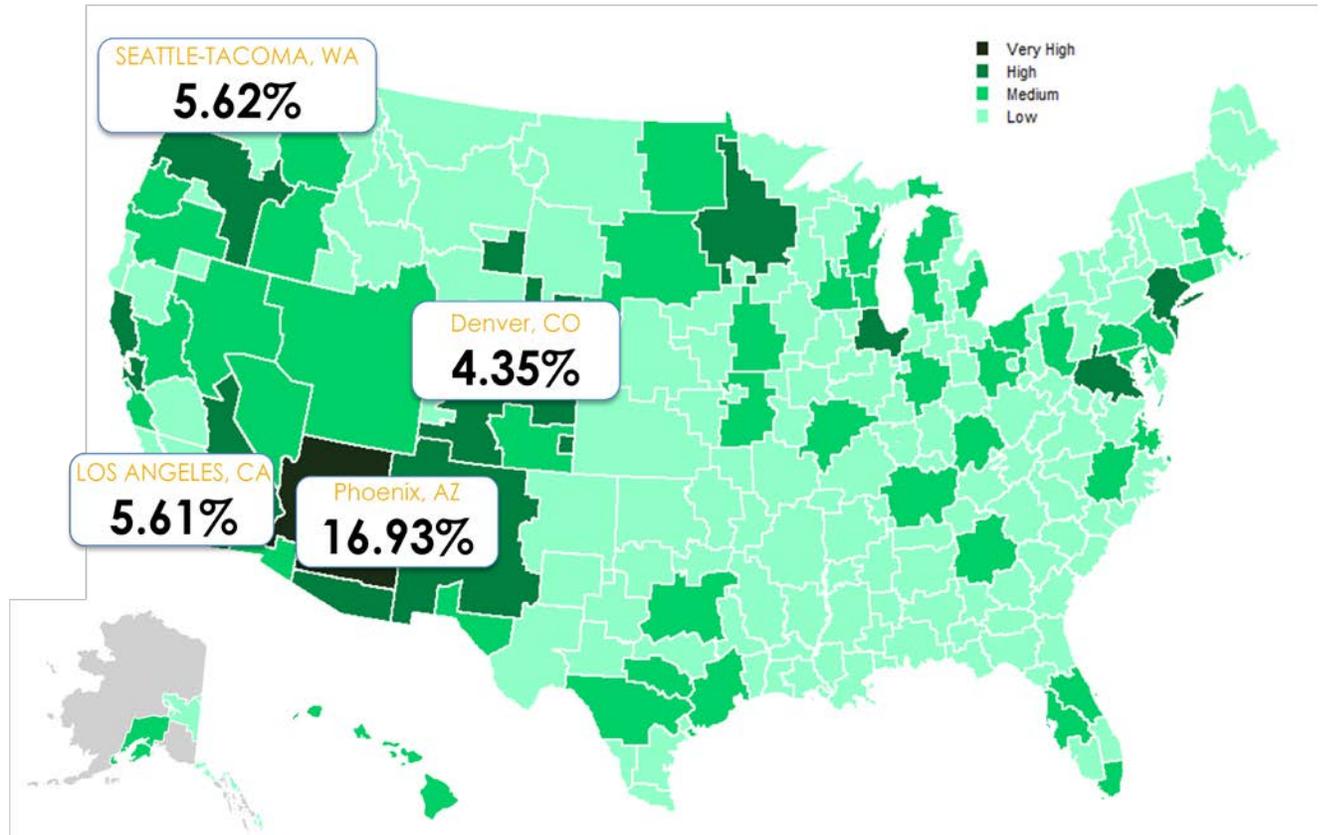
- Age: 55% are between 51-65
- Income: 68% have a household income greater than \$100,000/year

- Children in Household: 38%
 - Travel domestically: 60%
- 6. 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%
- 7. O51 – Digital Dependents**
- Age: 38% are between 25-35
 - Income: 6% have a household income greater than \$100,000/year
 - Children in Household: 25%
 - Travel domestically: 39%
- 8. 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%

Tucson & Southern Region: Top Visitor Cities of Origin by Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

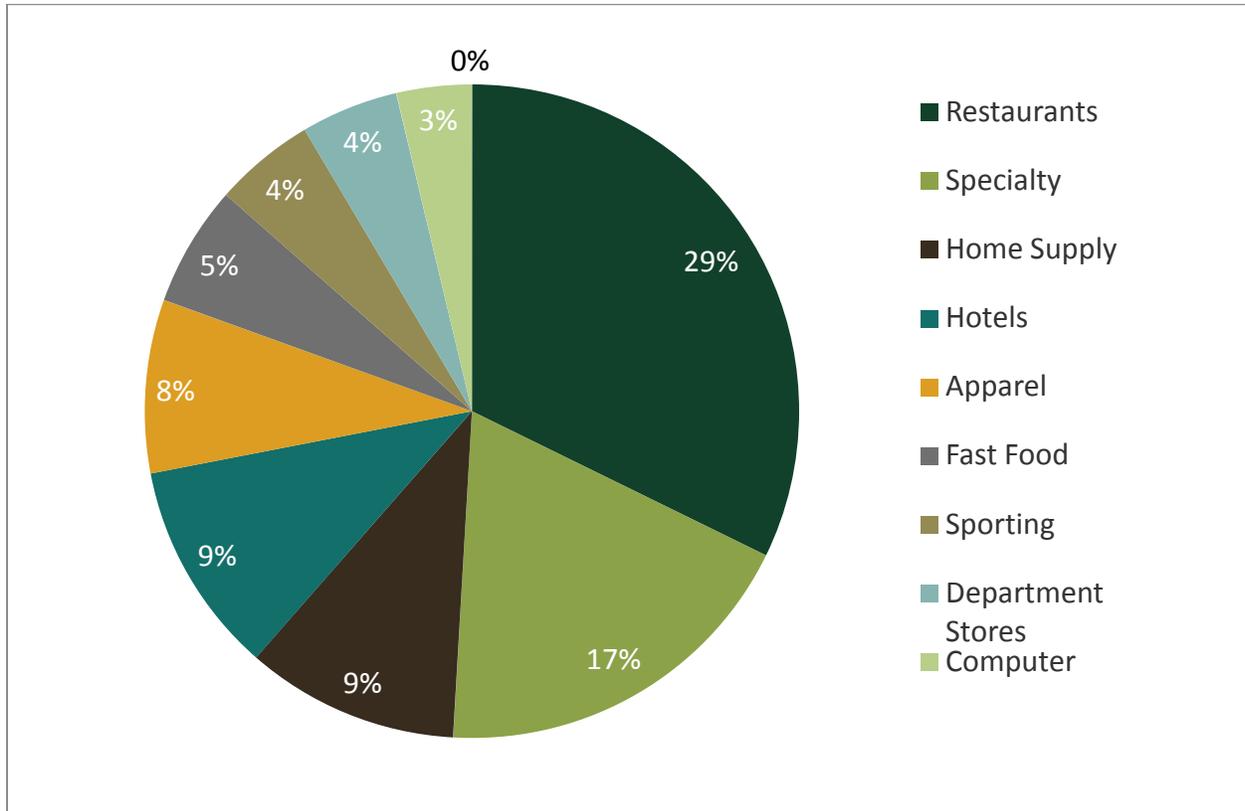


	Top DMAs	% of Spend
1	Phoenix (Prescott) AZ	16.93%
2	Seattle-Tacoma WA	5.62%
3	Los Angeles CA	5.61%
4	Denver CO	4.35%
5	Chicago IL	4.15%
6	Tucson (Sierra Vista) AZ	3.78%
7	San Francisco-Oakland-San Jose CA	3.69%
8	Minneapolis-St. Paul MN	3.25%
9	San Diego CA	2.24%
10	New York, NY	2.23%

Tucson & Southern 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	12.0%
2	Seattle-Tacoma WA	8.0%
3	Los Angeles CA	13.0%
4	Denver CO	9.7%
5	Chicago IL	11.8%
6	Tucson (Sierra Vista) AZ	0.4%
7	San Francisco-Oakland-San Jose CA	13.7%
8	Minneapolis-St. Paul MN	8.8%
9	San Diego CA	11.6%
10	New York, NY	12.0%

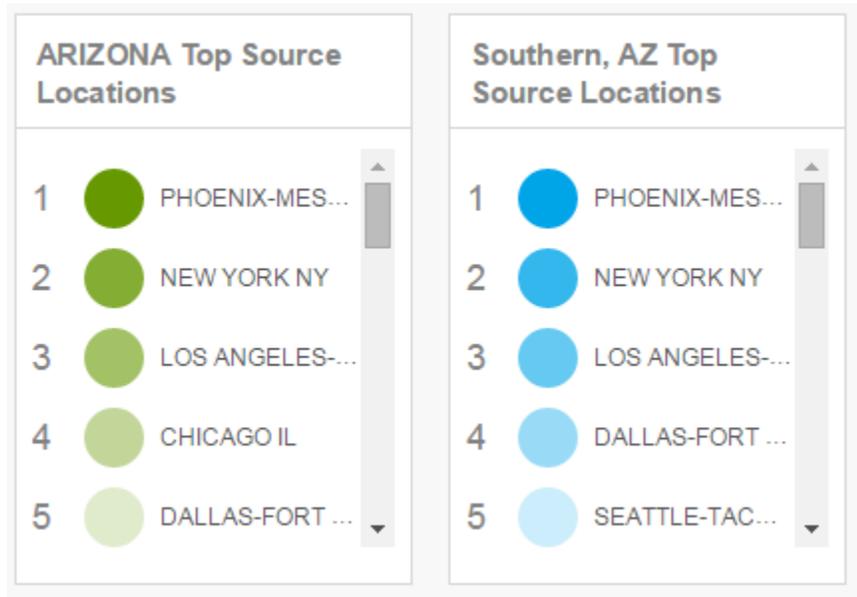
Tucson & Southern Region: Where are visitors searching from?

Period: May 2013-April 2014 (Travel Date)

Source: nSight

Top Ten Source Locations for Tucson & Southern Region:

1. Phoenix-Mesa, AZ
2. New York, NY
3. Los Angeles-Riverside-Orange County, CA
4. Dallas-Fort Worth, TX
5. Seattle-Tacoma, WA
6. Chicago, IL
7. Denver, CO
8. Tucson, AZ
9. Nuremburg, DE
10. San Jose, CA



Search to Stay Trend

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

