

Visitors to Arizona's West Coast Region

Prepared by
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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 West Coast Region?

Source: Dean Runyan Associates

West Coast Arizona Travel Impacts, 2004-2013p

| | 2004 | 2006 | 2008 | 2010 | 2011 | 2012 | 2013p |
|---|-------|-------|-------|-------|-------|-------|-------|
| Total Direct Travel Spending (\$Million) | | | | | | | |
| Destination Spending | 994 | 1,133 | 1,150 | 1,137 | 1,189 | 1,205 | 1,205 |
| Other Travel* | 68 | 95 | 122 | 108 | 125 | 132 | 132 |
| Total Direct Spending | 1,062 | 1,228 | 1,272 | 1,245 | 1,313 | 1,337 | 1,337 |
| Visitor Spending by Type of Accommodation (\$Million) | | | | | | | |
| Hotel, Motel | 226 | 289 | 259 | 253 | 278 | 277 | 266 |
| Private Home | 189 | 224 | 247 | 250 | 264 | 265 | 275 |
| Campground | 95 | 112 | 125 | 126 | 133 | 128 | 120 |
| Vacation Home | 81 | 91 | 99 | 98 | 103 | 105 | 106 |
| Day Travel | 404 | 418 | 420 | 410 | 411 | 429 | 438 |
| Destination Spending | 994 | 1,133 | 1,150 | 1,137 | 1,189 | 1,205 | 1,205 |
| Visitor Spending by Commodity Purchased (\$Million) | | | | | | | |
| Accommodations | 113 | 146 | 135 | 124 | 133 | 132 | 128 |
| Food Service | 208 | 240 | 245 | 259 | 266 | 271 | 278 |
| Food Stores | 119 | 120 | 128 | 124 | 126 | 131 | 135 |
| Local Tran. & Gas | 96 | 138 | 167 | 156 | 187 | 191 | 184 |
| Arts, Ent. & Rec. | 223 | 252 | 251 | 251 | 259 | 255 | 249 |
| Retail Sales | 226 | 227 | 212 | 211 | 206 | 214 | 218 |
| Visitor Air Tran. | 9 | 10 | 12 | 12 | 12 | 12 | 12 |
| Destination Spending | 994 | 1,133 | 1,150 | 1,137 | 1,189 | 1,205 | 1,205 |
| Industry Earnings Generated by Travel Spending (\$Million) | | | | | | | |
| Accom. & Food Serv. | 103 | 123 | 130 | 136 | 140 | 137 | 145 |
| Arts, Ent. & Rec. | 87 | 103 | 106 | 95 | 94 | 98 | 93 |
| Retail** | 52 | 55 | 56 | 50 | 49 | 49 | 49 |
| Visitor Air Tran. | 3 | 0 | 0 | 1 | 1 | 0 | 0 |
| Other Travel* | 9 | 10 | 16 | 11 | 11 | 12 | 14 |
| Total Direct Earnings | 254 | 291 | 309 | 293 | 295 | 297 | 302 |
| Industry Employment Generated by Travel Spending (Thousand Jobs) | | | | | | | |
| Accom. & Food Serv. | 6.0 | 6.7 | 6.5 | 6.6 | 6.8 | 6.4 | 6.8 |
| Arts, Ent. & Rec. | 4.7 | 5.3 | 4.6 | 4.2 | 4.2 | 4.5 | 4.2 |
| Retail** | 1.9 | 2.1 | 2.0 | 1.8 | 1.7 | 1.7 | 1.7 |
| Visitor Air Tran. | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Other Travel* | 0.3 | 0.4 | 0.6 | 0.4 | 0.4 | 0.4 | 0.5 |
| Total Direct Employment | 13.0 | 14.5 | 13.7 | 13.0 | 13.1 | 13.1 | 13.1 |
| Government Revenue Generated by Travel Spending (\$Million) | | | | | | | |
| Local Tax Receipts | 40.2 | 44.6 | 46.7 | 45.3 | 47.8 | 48.2 | 46.6 |
| State Tax Receipts | 47.7 | 54.5 | 55.4 | 55.6 | 59.7 | 60.5 | 59.0 |
| Total Direct Gov't Revenue | 87.9 | 99.1 | 102.1 | 101.0 | 107.5 | 108.8 | 105.5 |

Details may not add to totals due to rounding.

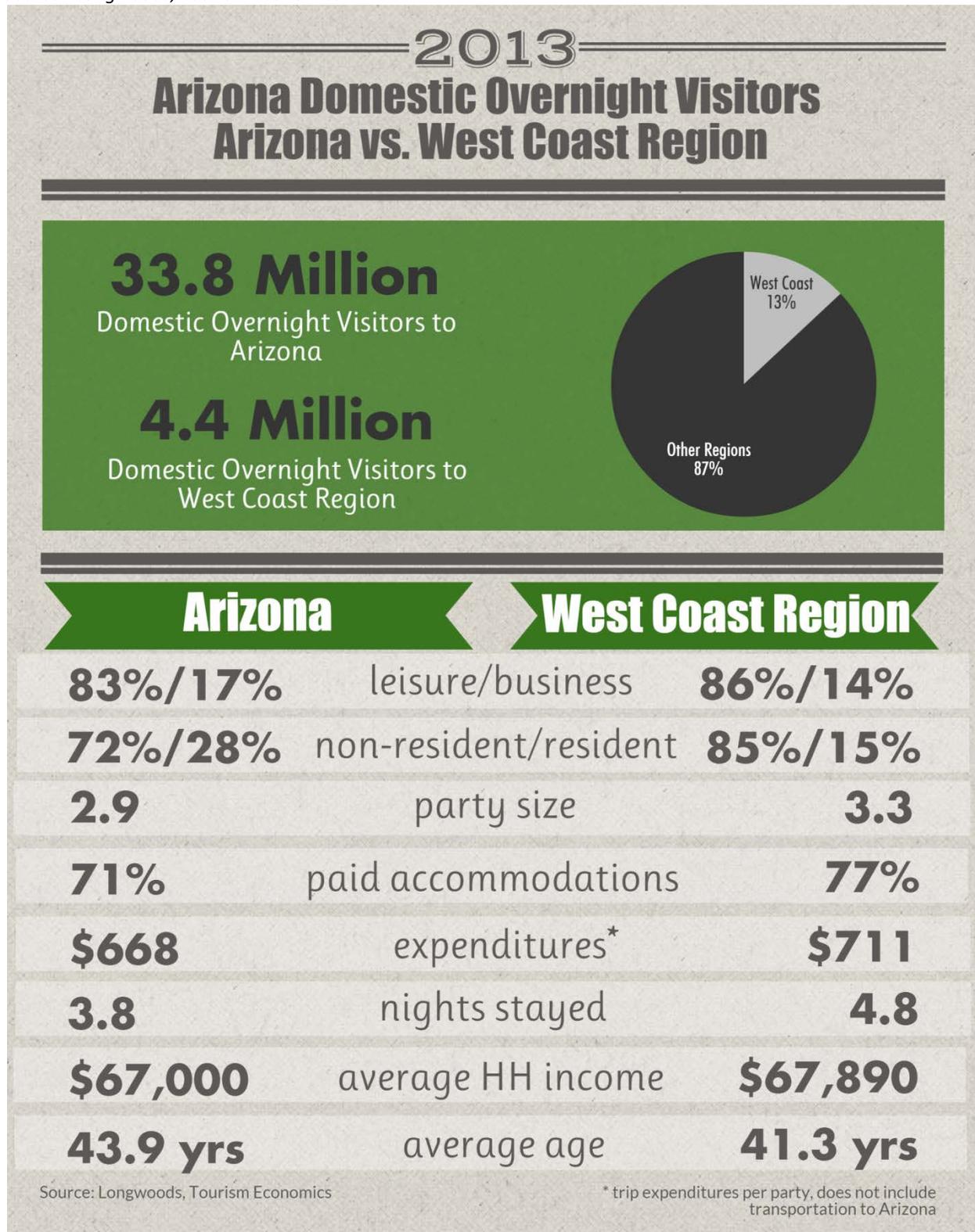
*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

**Retail includes gasoline.

West Coast Arizona includes La Paz, Mohave and Yuma counties.

Who visits the West Coast Region?

Source: Longwoods, Tourism Economics



West Coast Region: Visitor Profile Based on Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

Visitor Profile:

- Age Range of 45+ (76% of spend)
- Professional Occupation/Retired (66% of spend)
- College Educated (64% of spend)
- Income level of \$50K+ (54% of spend)
- Married (61% of spend)

Top Visitor Segments

These segments represent approximately 32% of West Coast 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. 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%

3. Q64 – Town Elders

- Age: 99.9% are above 51 years, 63% are 76 or older
- Income: 3% have a household income greater than \$100,000/year
- Children in Household: 0.4%
- Travel domestically: 27%

4. C14 – Boomers and Boomerangs

- Age: 85% are between 51-65
- Income: 40% have a household income greater than \$100K,000/year
- Children in Household: 50%
- Travel domestically: 53%

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. 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%

7. F22 – Fast Track Couples

- Age: 78% are between 25-35
- Income: 27% have a household income greater than \$100,000/year
- Children in Household: 40%
- Travel domestically: 58%

8. 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%



The screenshot displays the Experian Mosaic USA Interactive Guide interface. At the top left is the Experian Mosaic logo. The main header reads "Mosaic USA Interactive Guide". Below this is a navigation bar with tabs for Segments, System Profiles, Resources, Settings, ZIP Code Lookup, and a search field for "Enter ZIP Code". On the right, there are links for About, Exit, and Help.

The main content area is titled "Type C11: Aging of Aquarius" with a subtitle "Upscale boomer-aged couples living in city and close-in suburbs". The user profile "Mark & Kathleen" is shown with a 2.34% home icon and a 3.26% person icon. Below the title is a row of tabs: Imagery, Description, Streetscapes, Regional Distribution, Mapping, Family Tree, Pen Portrait, and Data Insights.

On the left side, there is a "Select Data" panel with a search bar and a list of Experian Variables. The variables are categorized under "Who we are" and include: Head of household gender (Female, Male), Head of household age, Family structure, Head of household ethnicity, Household size, Children, Additional adults in house..., TGI socio-economic levels, Where we live, How we get by, What is our financial circum..., How we live our lives, What is our digital life, How we prefer communicat..., How Green we are, How we maintain healthy lif..., and How we view the world. There is also a "Custom Variables" section.

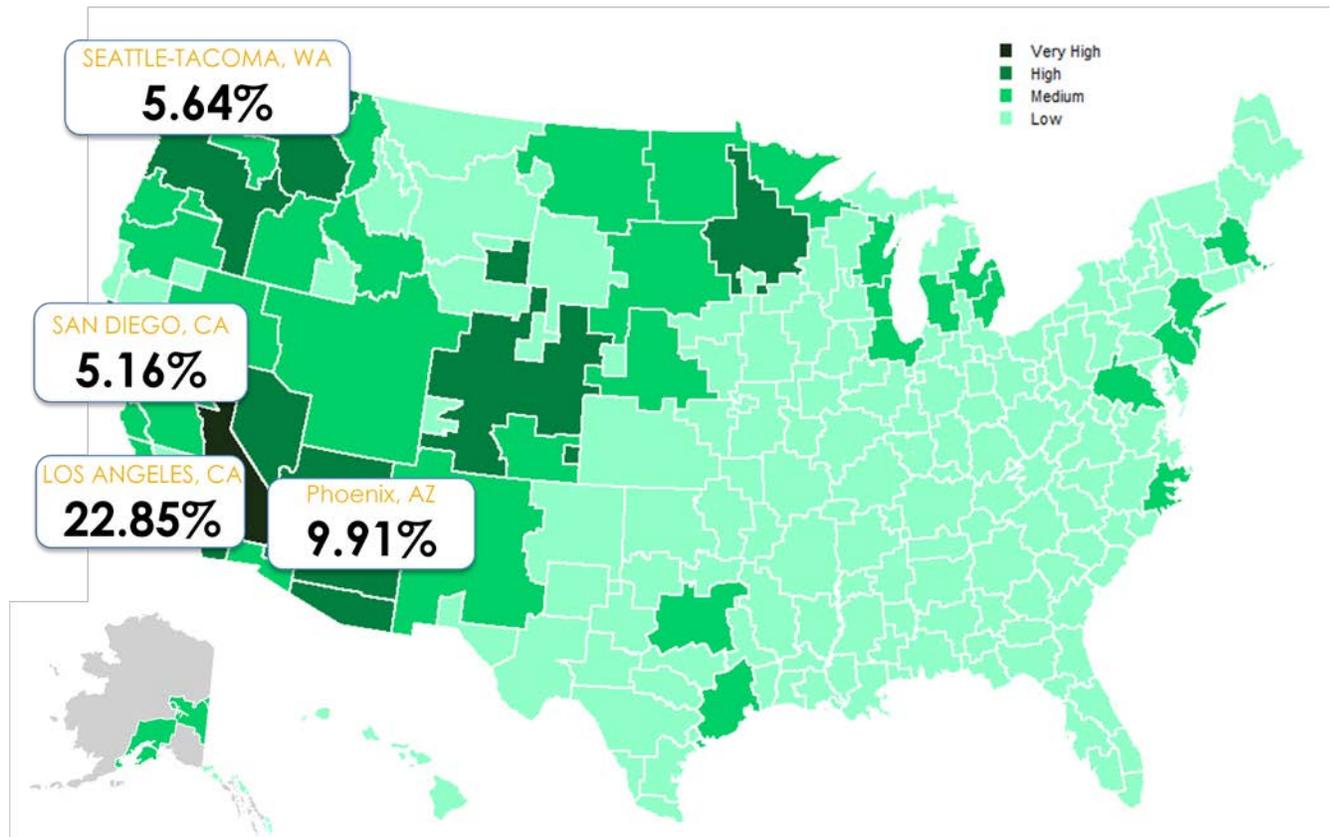
The main "Imagery" section features a large central image of a smiling couple in front of a house, surrounded by smaller images of a bridge, a gnome, a person playing a saxophone, a sailboat, and a golf course.

At the bottom, a "Profile" section shows: "How we get by | Head of household's education Less than High School". To the right, it states "Type C11 ranked 63 out of 71 with an Index of 11" and includes a "Profile Rank Type Order" button.

West Coast Region: Top Visitor Cities of Origin by Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

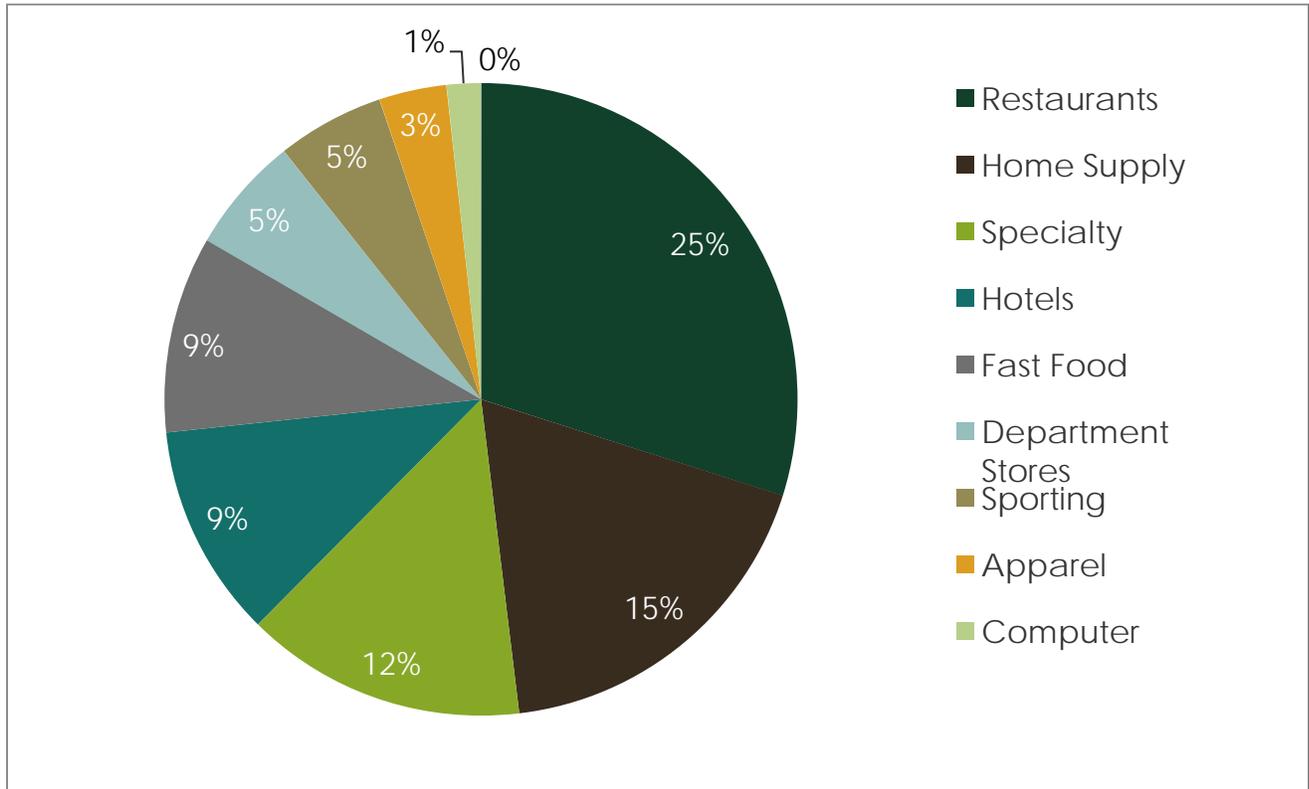


| | Top DMAs | % of Spend |
|----|--------------------------|------------|
| 1 | Los Angeles CA | 22.86% |
| 2 | Phoenix (Prescott) AZ | 9.91% |
| 3 | Seattle -Tacoma WA | 5.65% |
| 4 | San Diego CA | 5.16% |
| 5 | Las Vegas NV | 4.08% |
| 6 | Portland OR | 3.39% |
| 7 | Minneapolis-St. Paul MN | 2.74% |
| 8 | Denver CO | 2.30% |
| 9 | Tucson (Sierra Vista) AZ | 2.06% |
| 10 | Spokane WA | 1.93% |

West Coast 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 | Los Angeles CA | 13.4% |
| 2 | Phoenix (Prescott) AZ | 14.6% |
| 3 | Seattle-Tacoma WA | 6.1% |
| 4 | San Diego CA | 11.9% |
| 5 | Las Vegas NV | 7.5% |
| 6 | Portland OR | 6.2% |
| 7 | Minneapolis-St. Paul MN | 10.8% |
| 8 | Denver CO | 8.9% |
| 9 | Tucson (Sierra Vista) AZ | 15.6% |
| 10 | Spokane WA | 4.2% |

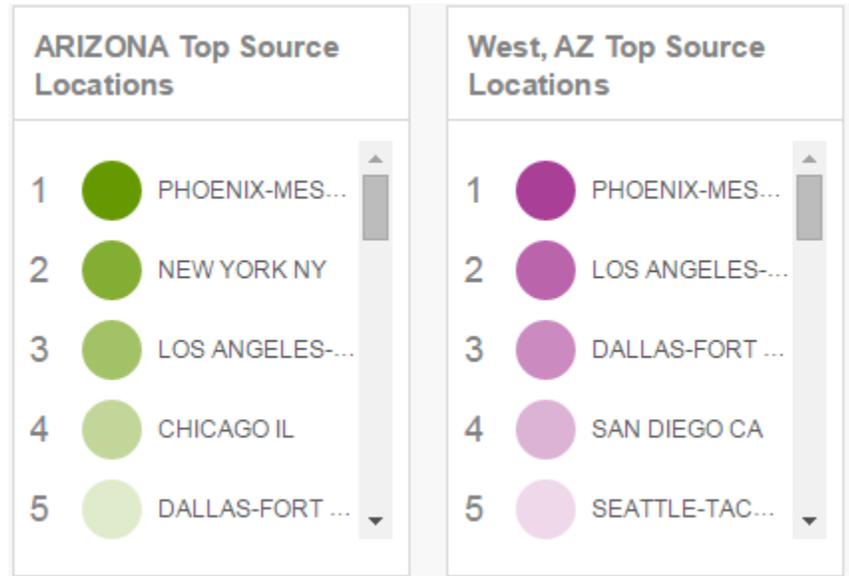
West Coast Region: Where are visitors searching from?

Period: May 2013-April 2014 (Travel Date)

Source: nSight

Top Ten Source Locations for West Coast Region:

1. Phoenix-Mesa, AZ
2. Los Angeles-Riverside-Orange County, CA
3. Dallas-Fort Worth, TX
4. San Diego, CA
5. Seattle-Tacoma, WA
6. New York, NY
7. Chicago, IL
8. Atlanta, GA
9. Calgary, CA
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.

