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OFFICE OF TOURISM

Arizona Travel Impacts & Portrait of the Arizona Traveler

June 22, 2015

tourism.az.gov

Arizona Statewide Data

Direct Travel Spending
Overnight Visitation Volume
Visitor Portrait

Travel Industry Indicators

2014 Recap
2015 YTD

Planning

AOT Partners
Target Markets
OTA Search and Book Trends
Campaign Research
Case Studies

Regional Data

Direct Travel Spending
Overnight Visitation
Visitor Portrait
Regional Indicators

Arizona Travel Industry Performance

2014

40.7 million

Overnight Visitors

Up 4.1% YOY

$20.9 billion

Direct Spending

Up 5.4% YOY

Source: Dean Runyan Associates, Tourism Economics

$20.9 billion of direct spending in Arizona generated...

$5.9 billion
employment earnings

Up 6.3% YOY

171,500
industry jobs

Up 3.8% YOY

$2.8 billion
federal, state and local tax revenue

Up 2.8% YOY

Source: Dean Runyan Associates, 2014

Direct Travel Spending in Arizona

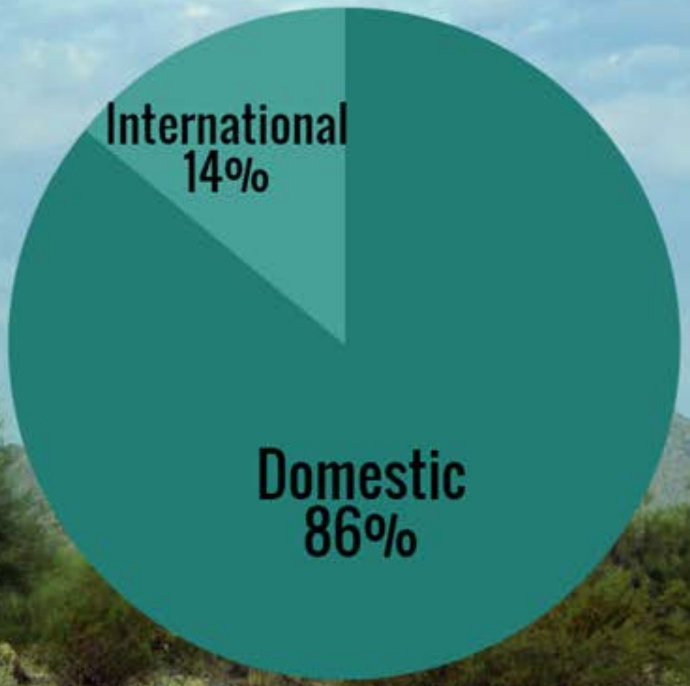
Source: Dean Runyan Associates, 2014

Gross Domestic Product in Arizona

Export-Oriented Industries

Source: Dean Runyan Associates, 2014

Total Overnight Visitation to Arizona



2014

Total Visitation:
40.7 million
↑ 4.1% YOY

Domestic Visitation:
35.0 million
↑ 3.7% YOY

International Visitation:
5.7 million
↑ 6.3% YOY

Source: Tourism Economics, Longwoods International 2014

2014 Domestic Visitation

Visitation Volume
Visitor Portraits

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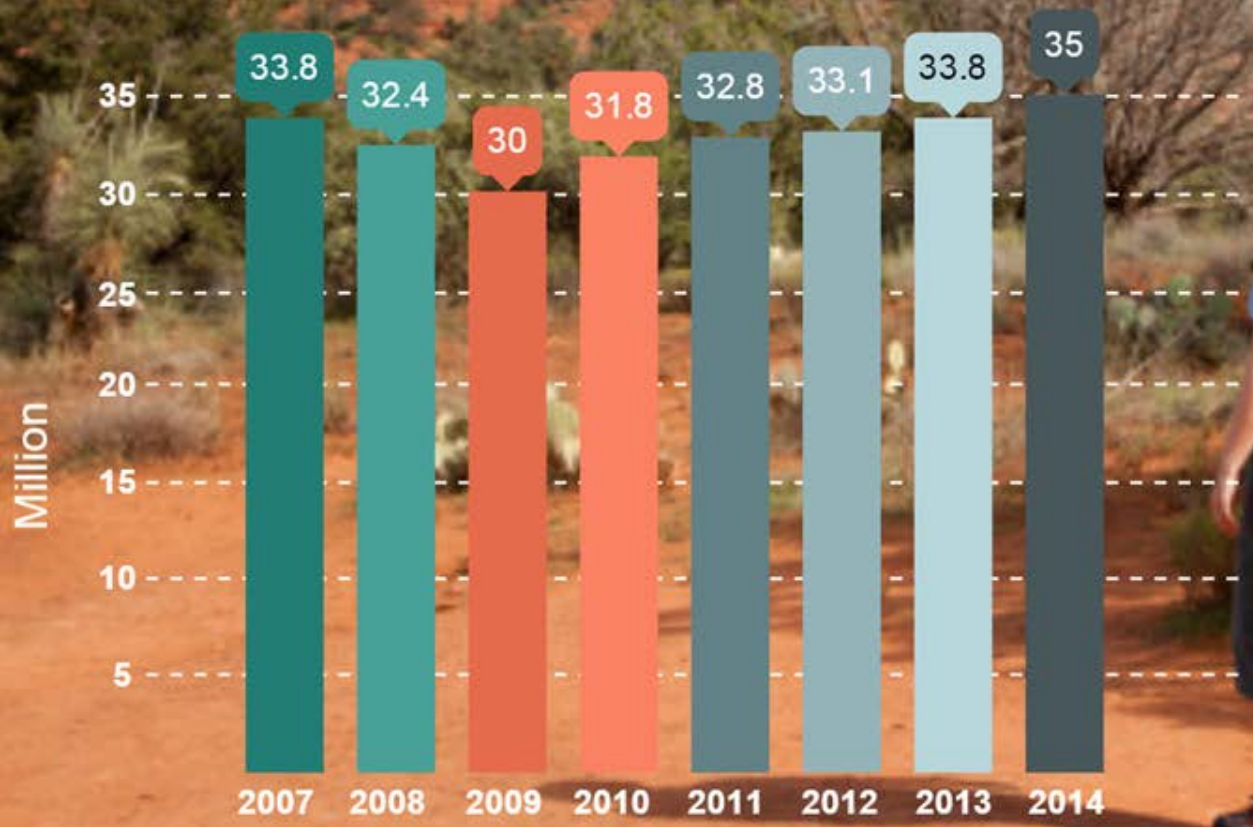
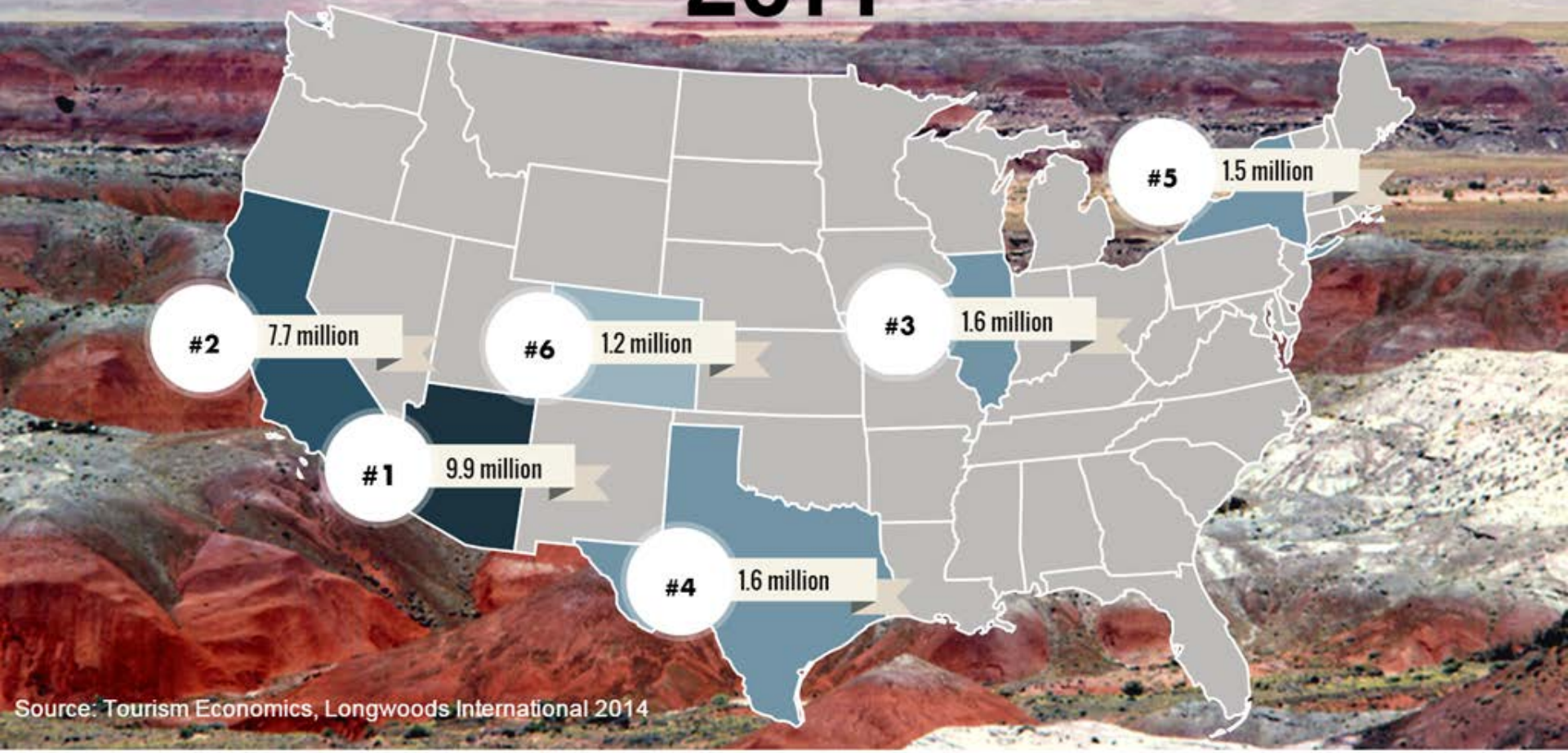
Total Domestic Overnight Visitation to Arizona



↑ 3.6% compared to 2007

Source: Tourism Economics, Longwoods International 2014

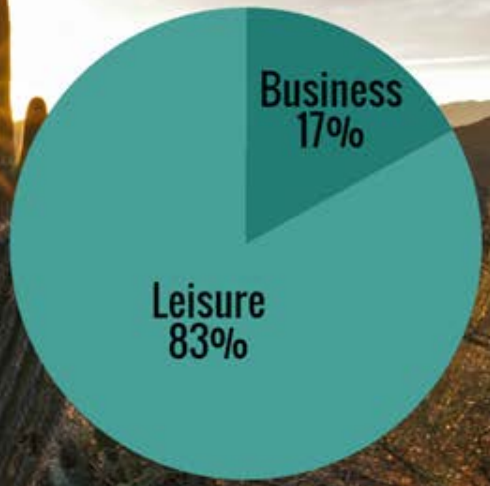
Domestic Overnight Visitation 2014



Source: Tourism Economics, Longwoods International 2014

1. Arizona 9.9 M
2. California 7.7 M
3. Illinois 1.6 M
4. Texas 1.6 M
5. New York 1.5 M
6. Colorado 1.2 M

Domestic Overnight Visitation to Arizona by Type



Source: Longwoods International, 2014

Arizona Domestic Overnight Visitor Portrait

3.7	nights
2.9	persons per party
$651	trip expenditures*
71%	paid accommodations
$70,380	average household income
45.1	average age

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Domestic Overnight Visitor Portrait

Resident

2.5	nights
2.8	persons per party
$397	trip expenditures*
67%	paid accommodations
$58,750	average household income
44.9	average age

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Domestic Overnight Visitor Portrait

Non-Resident

4.3	nights
2.9	persons per party
$767	trip expenditures*
72%	paid accommodations
$75,160	average household income
45.1	average age

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Domestic Overnight Visitor Portrait

Leisure

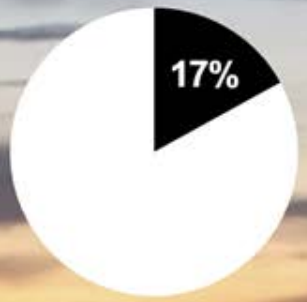
3.7	nights
2.9	persons per party
$623	trip expenditures*
69%	paid accommodations
$68,090	average household income
44.7	average age

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Domestic Overnight Visitor Portrait

Business

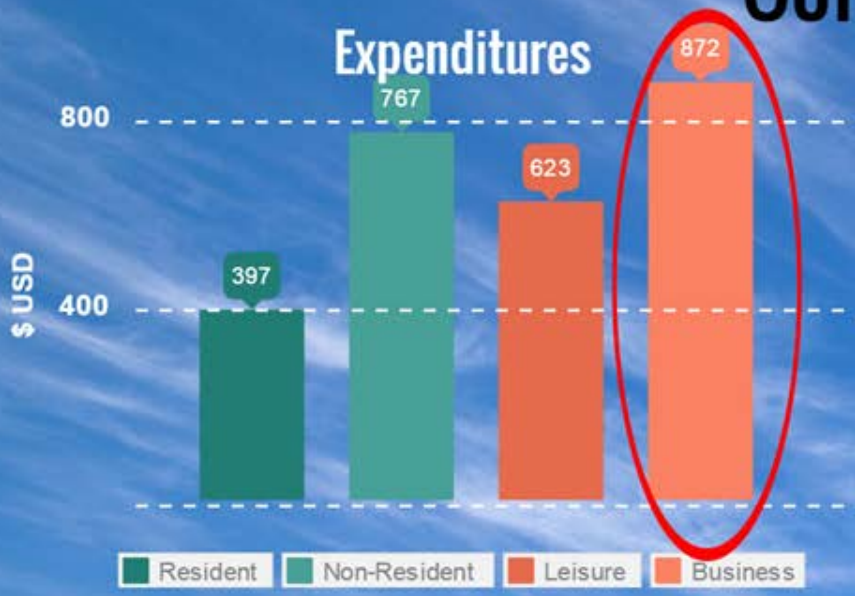


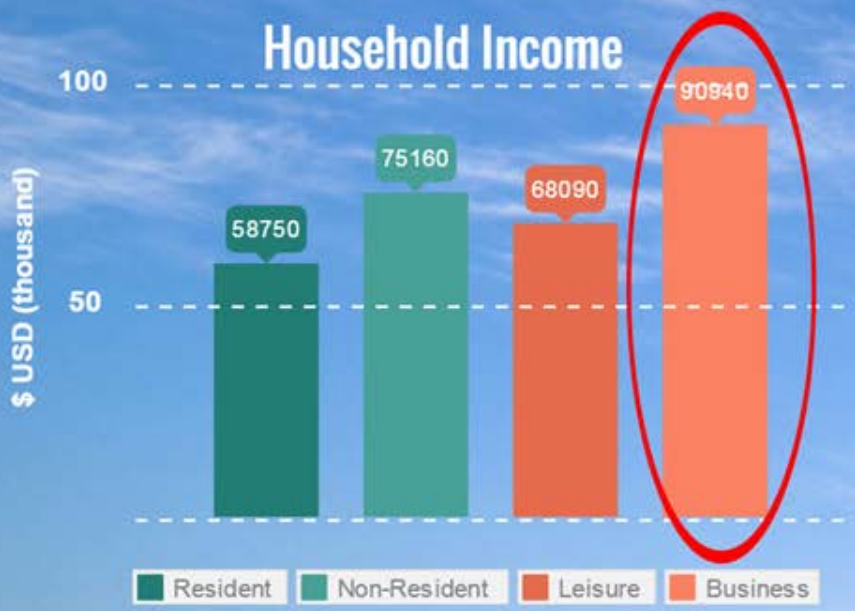
3.3	nights
2.2	persons per party
$872	trip expenditures*
86%	paid accommodations
$90,940	average household income
46.9	average age

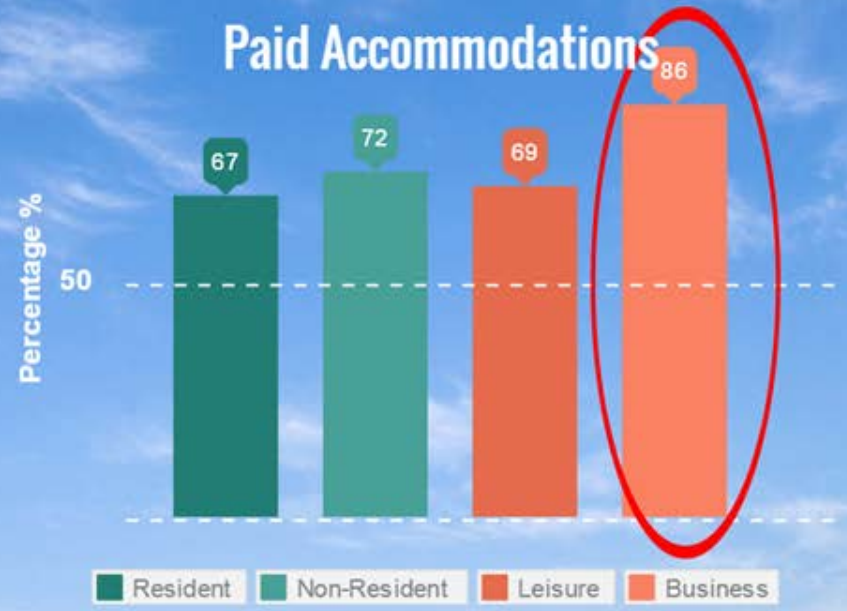
Source: Longwoods International, 2014

*Does not include transportation to and from destination

Domestic Overnight Visitor Portrait Comparisons







2014 International Visitation

Visitation Volume
Visitor Portrait

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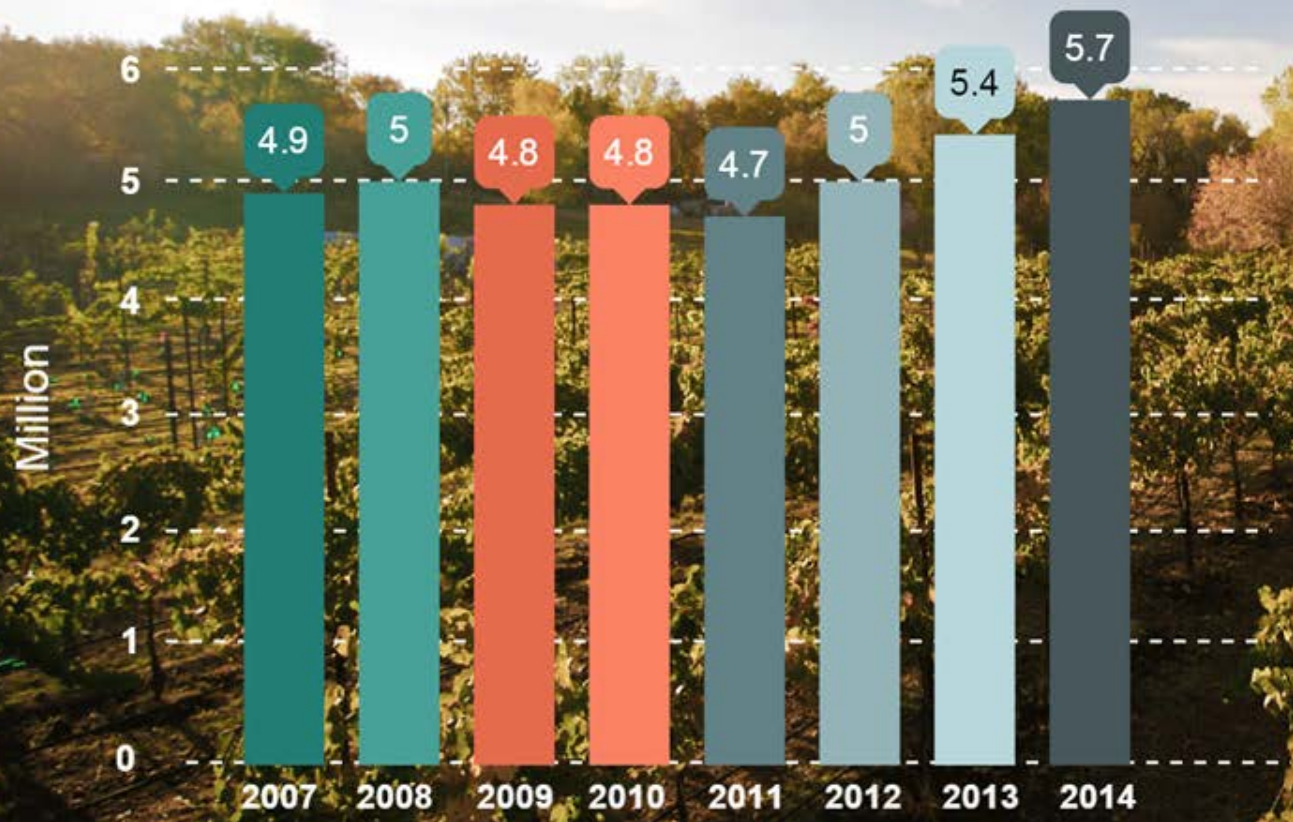
International Overnight Visitation to Arizona



↑13.8% compared to 2008

Source: Tourism Economics, 2014

International Overnight Visitation to Arizona

1. Mexico	3.8 million	5. France	113,385	9. Australia	47,535
2. Canada	896,467	6. S. Korea	54,015	10. Switzerland	36,554
3. Germany	127,705	7. China	52,105	11. Brazil	30,992
4. United Kingdom	116,542	8. Japan	51,602	12. Other overseas	321,878

Source: Tourism Economics, 2014

International Overnight Visits to Arizona % Change

International Overnight Visits to Arizona				
	2011	2012	2013	2014
Mexico	-4.6%	6.8%	7.8%	6.0%
Canada	8.3%	3.4%	16.8%	5.4%
Germany	2.9%	0.2%	-0.2%	6.4%
United Kingdom	-6.2%	-4.9%	-2.4%	2.1%
France	13.3%	-2.9%	-1.0%	7.1%
Korea Republic of	-4.1%	10.3%	19.5%	2.4%
China	19.2%	24.0%	18.4%	42.0%
Japan	9.9%	4.5%	4.4%	5.1%
Australia	7.8%	4.1%	-4.6%	8.7%
Switzerland	9.8%	-6.0%	-6.3%	6.3%
Brazil	13.0%	17.4%	3.6%	10.8%
Other Overseas	6.8%	0.2%	0.2%	8.7%
Overseas Total	5.2%	0.9%	1.1%	8.1%
Total International	-1.2%	5.2%	7.9%	6.3%

Source: Tourism Economics, 2014

Arizona Overseas Overnight Visitor Portrait

6.3	nights
3.6	persons per party
$4,228	trip expenditures*
78%	paid accommodations
$93,337	average household income
41.6	average age

Source: U.S. Department of Commerce, National Travel and Tourism Office (NTTO)

*Does not include transportation to and from destination

Tourism Indicators

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Arizona
2014 Indicator Performance

Lodging

61.1%
Occupancy
Up 4.5% YOY

$104.55
ADR
Up 4.5% YOY

$63.92
RevPAR
Up 9.2% YOY

Source: STR

Arizona
2014 Indicator Performance

State Parks

2.3 million
Total Visitors

Up 2.0% YOY

National Parks

12.8 million
Recreational Visits

Up 6.8% YOY

Airports

47.3 million
Passengers

Up 2.3% YOY

Source: NAU

2015 YTD Indicator Performance

Lodging (as of May 2015)

69.3%
Occupancy
Up 4.6% compared to May 2014

$125.80
ADR
Up 10.0% compared to May 2014

$87.16
RevPAR
Up 15.0% compared to May 2014

Source: STR

Arizona
2015 YTD Indicator Performance

State Parks

↑ 14.4% compared to May 2014

Airports

↑ 4.1% compared to April 2014

Strong U.S. Dollar

As of June 14, 2015

↑ 21% against Euro

↑ 10% against British pound

↑ 14% against Canadian dollar

↑ 19% against Mexican peso

Source: NAU, OANDA.com

Planning

AOT Research Partners

VisaVue® *Travel*

AOT's Target Life Stages

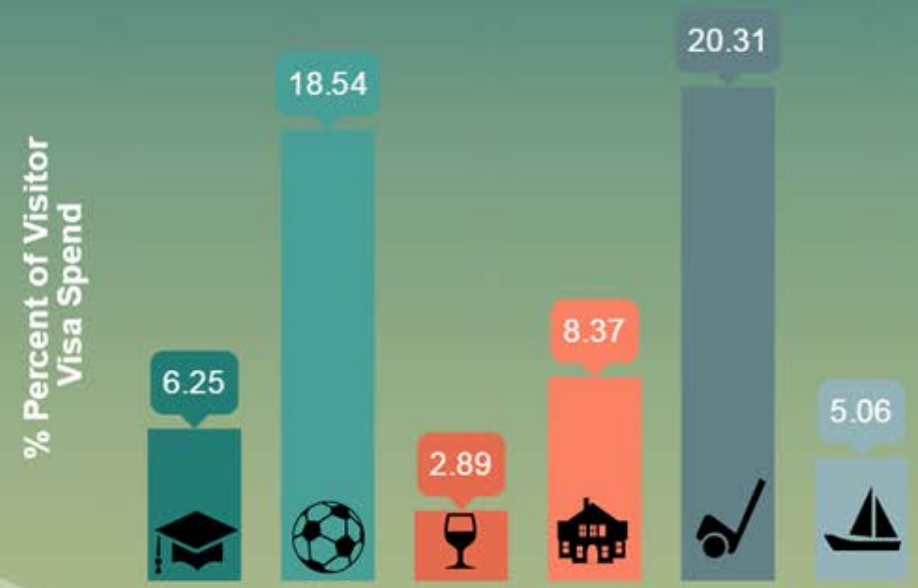
- Younger Years (no children) - $75K+
- Family Life - $100K+
- Gen X Older (no children) - $75K+
- Young Boomers (with children) - $100K+
- Young Boomers (no children) - $100K+
- Older Boomers (no children) - $100K+

Represents 30% of all US households

Source: AOT Research, Experian Mosaic

Arizona Lifestage Performance

(May 2013 - April 2014)



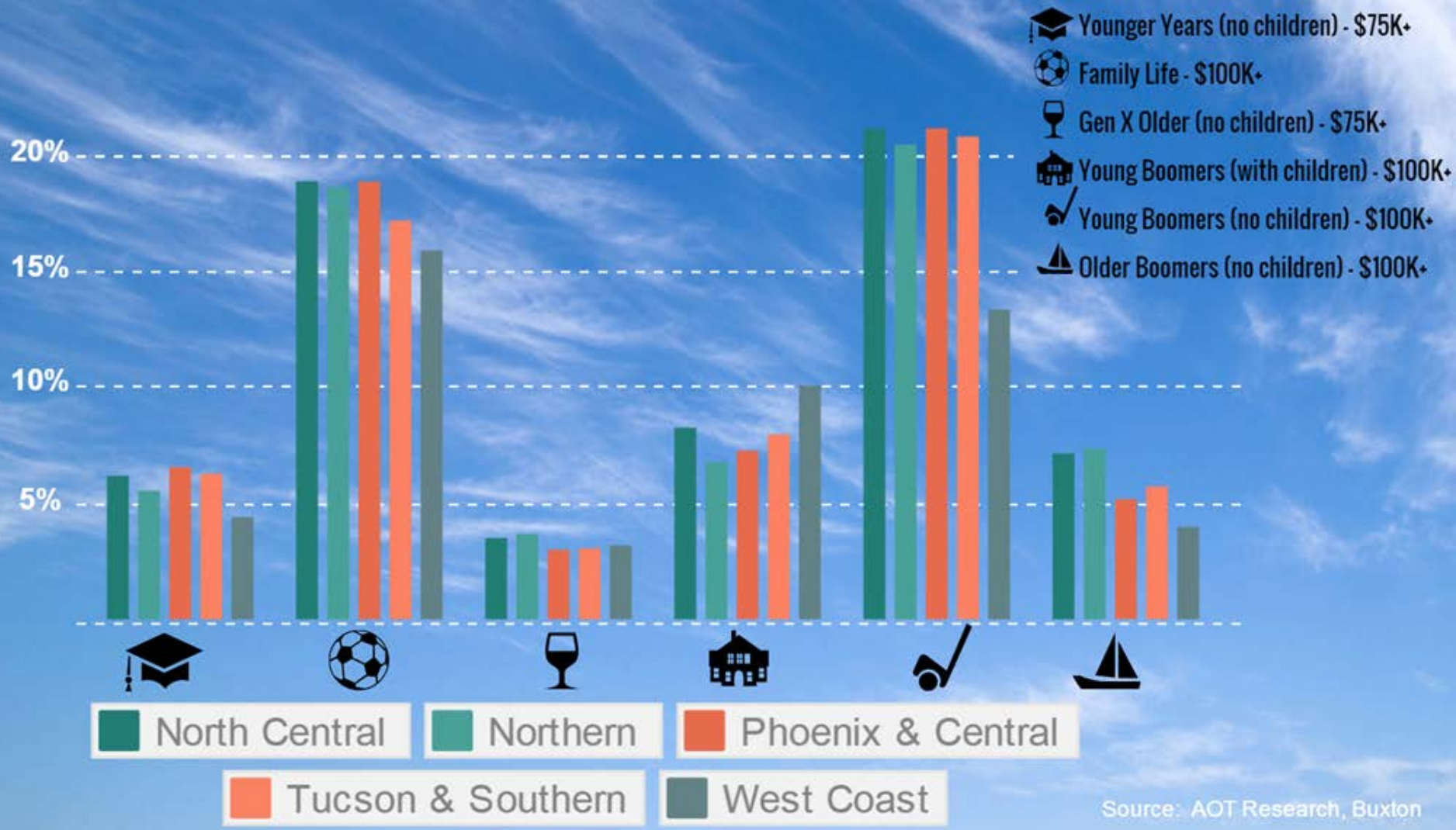
- Younger Years (no children) - $75K+
- Family Life - $100K+
- Gen X Older (no children) - $75K+
- Young Boomers (with children) - $100K+
- Young Boomers (no children) - $100K+
- Older Boomers (no children) - $100K+

Represents **61.4%** of Arizona visitors

Source: AOT Research, Buxton

Lifestage Performance

% Percent of Visa Card Spend



Source: AOT Research, Buxton

Lifestages and Segments

27 Experian Segments Targeted by AOT

Source: AOT Research, Experian Mosaic

High Performing Experian Segments

C11

Aging of Aquarius

White collar Baby Boomers
Read print newspapers and travel magazines
Travel domestically and internationally
Casinos and Cruises

	Rank	Percentage of Spend
Arizona	1	8.6%
North Central	1	9.5%
Northern	1	9.0%
Phoenix & Central	1	8.6%
Tucson & Southern	1	8.7%
West Coast	1	7.4%

Source: Buxton, Experian Mosaic

High Performing Experian Segments

A02

Platinum Prosperity

Affluent, high-powered professionals
Read in-flight, business, and culinary magazines
Travel domestically and internationally
Live theater, museums, concerts

	Rank	Percentage of Spend
Arizona	2	7.3%
North Central	2	7.5%
Northern	2	7.3%
Phoenix & Central	2	8.3%
Tucson & Southern	2	7.4%
West Coast	7	3.1%

Source: Buxton, Experian Mosaic

High Performing Experian Segments

A01

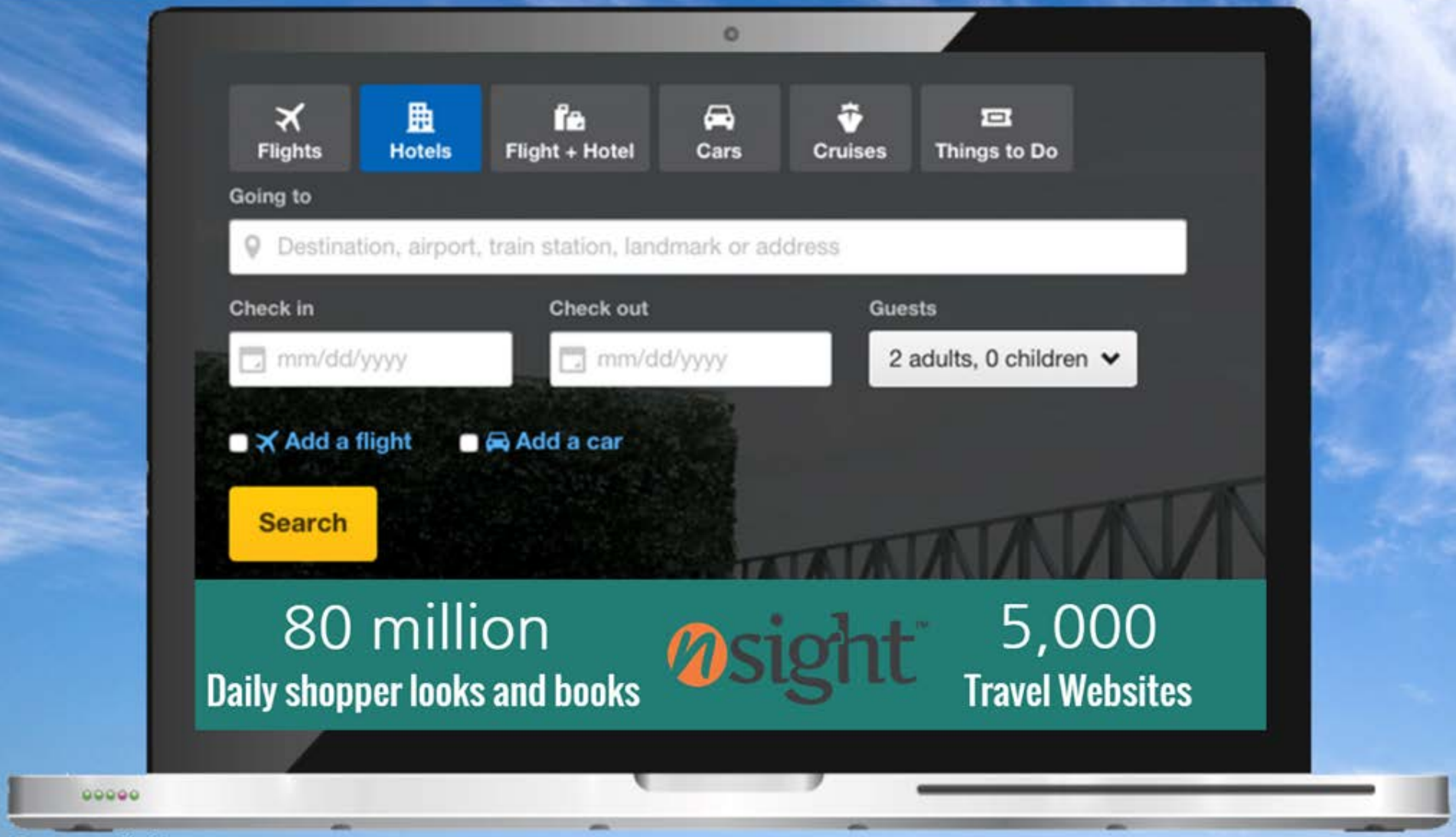
American Royalty

Wealthiest households
Luxury
Read in-flight, business, and culinary magazines
Travel domestically and internationally
Attend sports events, golf, cycling, hiking

	Rank	Percentage of Spend
Arizona	3	7.3%
North Central	4	4.2%
Northern	4	3.8%
Phoenix & Central	3	4.2%
Tucson & Southern	3	4.5%
West Coast	24	1.6%

Source: Buxton, Experian Mosaic

OTA Search and Book Trends



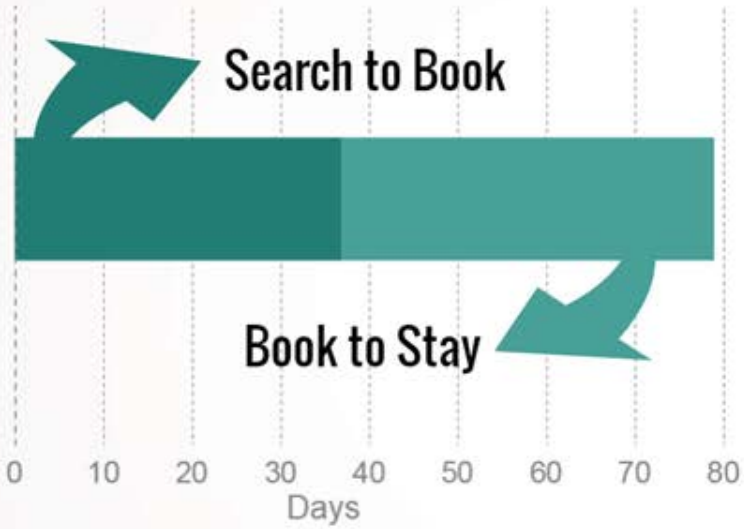
Source: nSight

OTA Search and Book Trends for Arizona

May 2015

23,516,731
Searches for Arizona

1.67%
of U.S. Share



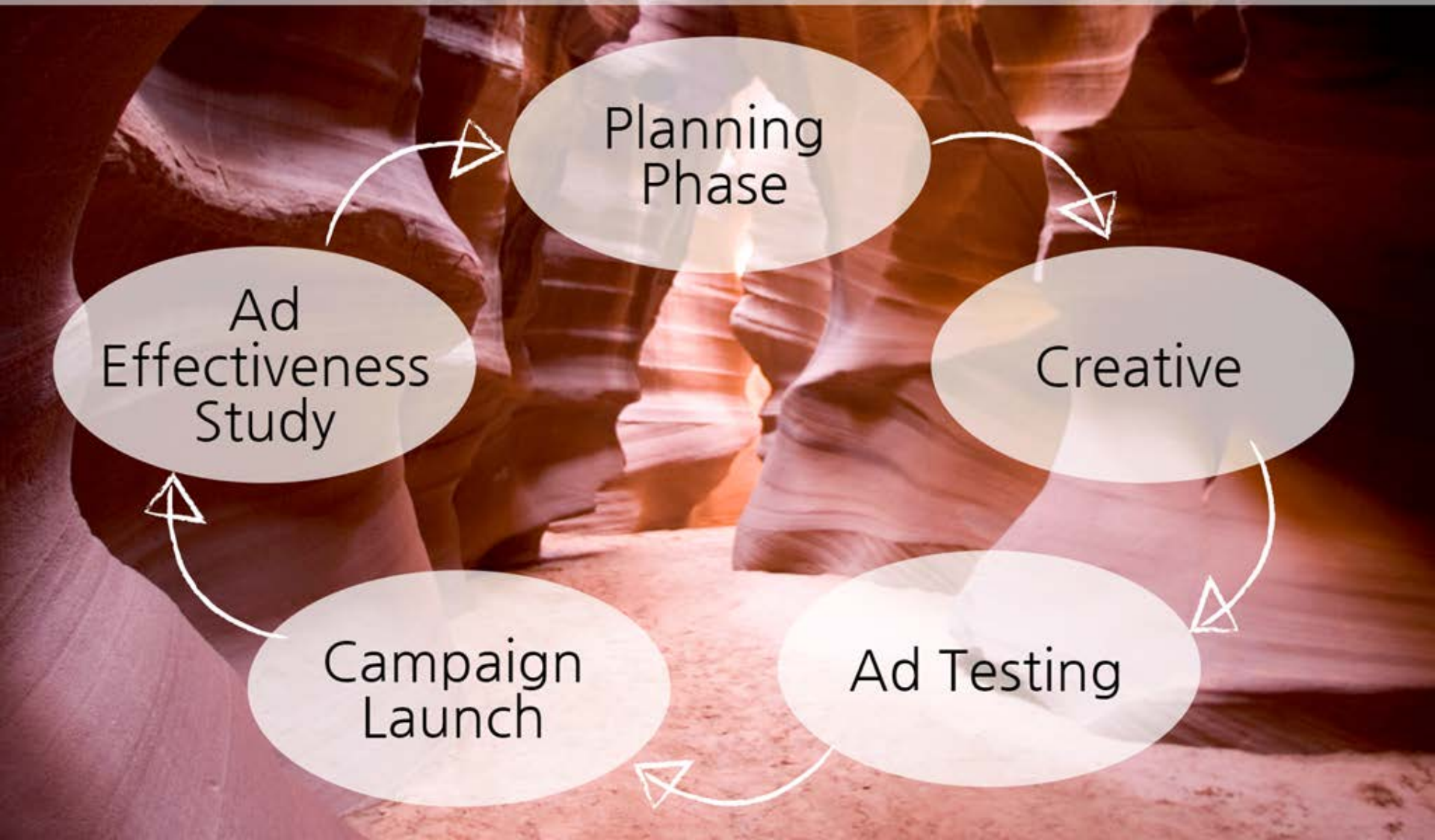
Domestic Booking Window

Top 5 U.S. Sources

Arizona	22%
California	19%
New York	7%
Texas	5%
Illinois	4%

Source: nSight

AOT National Campaign Cycle



AOT Target Cities Analysis

Inputs are then weighted and sorted into categories...

Visitation and Engagement
Propensity to Travel
Economy in Market
Mobility
Influence of Media in Market

= Index Score

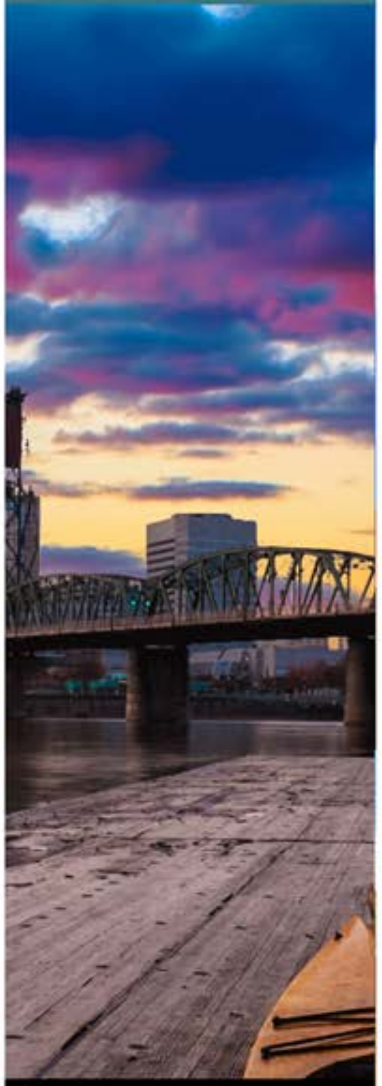
Rank	City	Score
1	Seattle, WA - Tacoma, WA	124.89
2	Minneapolis, MN	124.80
3	Chicago, IL	121.36
4	Austin, TX	119.48
5	San Diego, CA	119.37
6	Dallas, TX – Ft. Worth, TX	118.95
7	Portland, OR	118.85
8	San Francisco, CA - Oakland, CA - San Jose, CA	117.73
9	Houston, TX	117.49
10	Denver, CO	117.11

AOT then chooses Target Cities based on the agency's budget, city ranking, internal and external stakeholder preferences, and other factors...

Chicago, IL

Seattle, WA

Minneapolis, MN

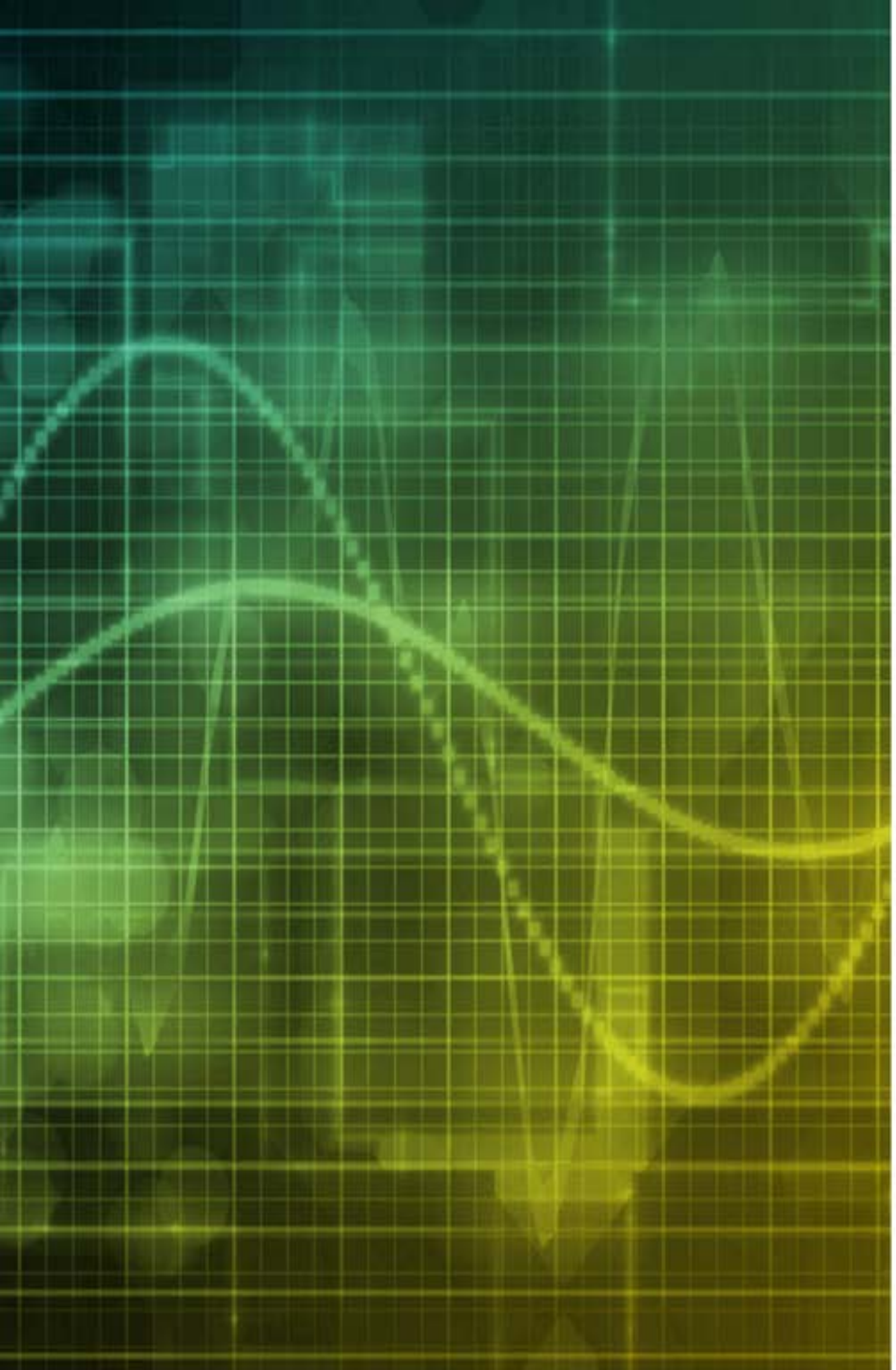


Portland, OR

Austin, TX

Full Campaign

Digital Only

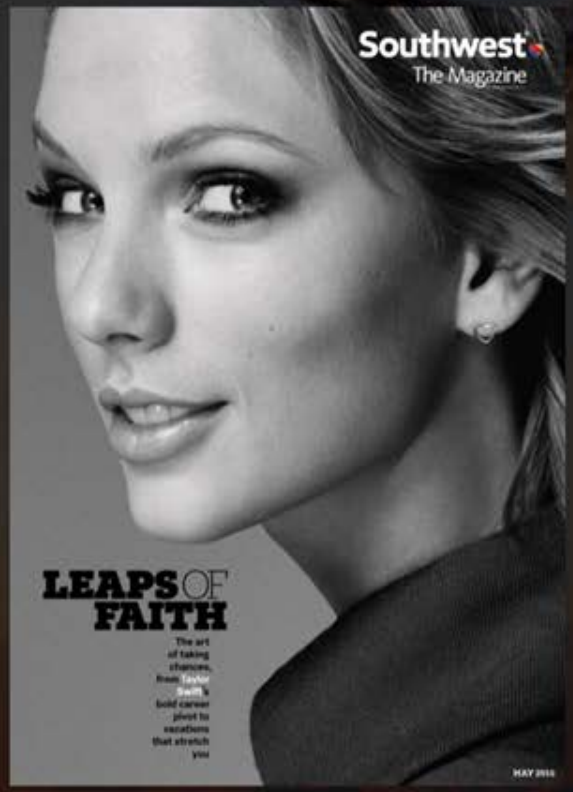


AOT
Case Studies

In-flight Magazine Ad Purchase

Circulation: 850,000

Cost of full-page ad:
$36,000



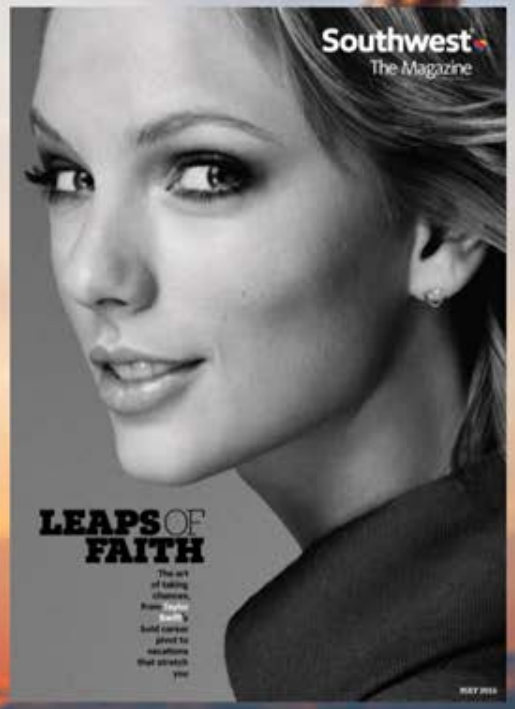
Circulation: 450,428

Cost of full-page ad:
$28,000

In-flight Magazine Ad Purchase

Co-Op Target Markets:

Austin
Chicago
Las Vegas
Los Angeles
San Diego
Seattle



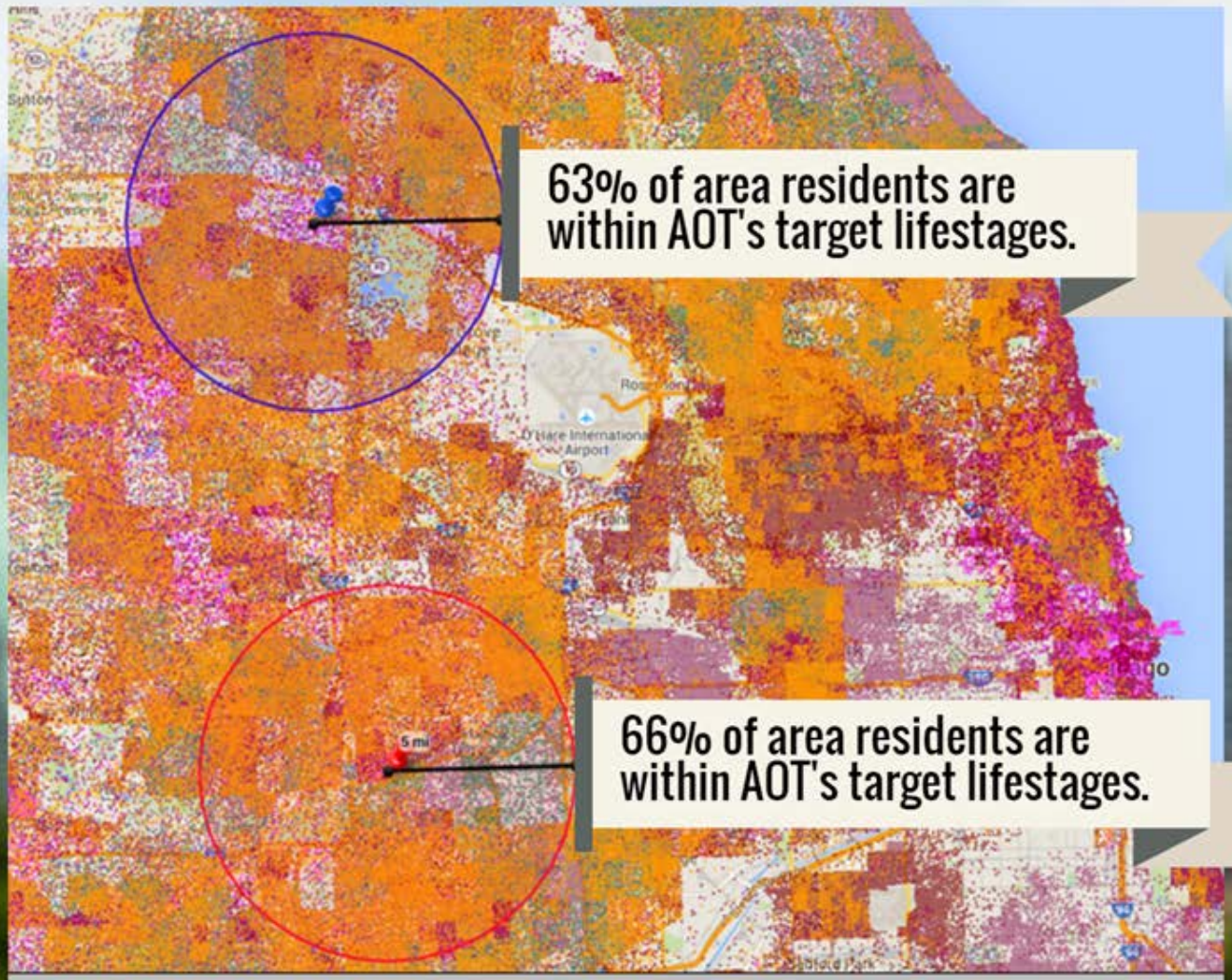
Of the two airlines, Southwest carried 61% of passengers from target markets to Phoenix in 2014.

Source: Diio

Chicago Activation Site Location Analysis

Two potential locations:

Chicago Activation Site Location Analysis



Key:

Younger Years = Pink
Family Life = Orange
Young Boomers w/ C = Purple
Young Boomers NC = Brown
Older Boomer NC = Green

Page Springs Cellars

London Bridge

Winslow

Regional Profiles

Musical Instrument Museum

San Xavier del Bac

Northern Region

(Apache, Coconino and Navajo Counties)

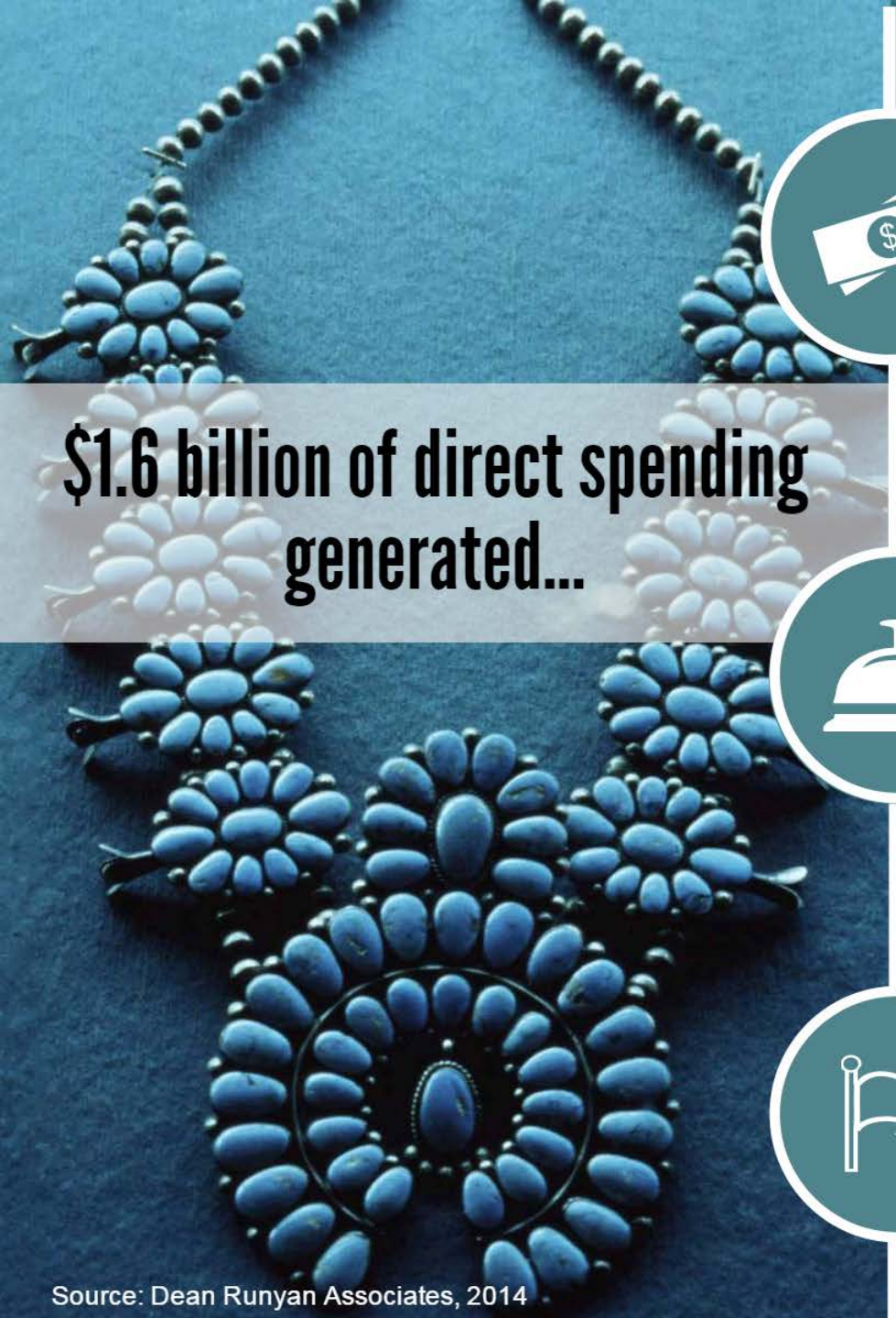
8.0 million

Domestic Overnight Visitors

$1.6 billion

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics



$1.6 billion of direct spending generated...

$437 million

employment earnings

Up 5.6% YOY

17,000

industry jobs

Up 2.4% YOY

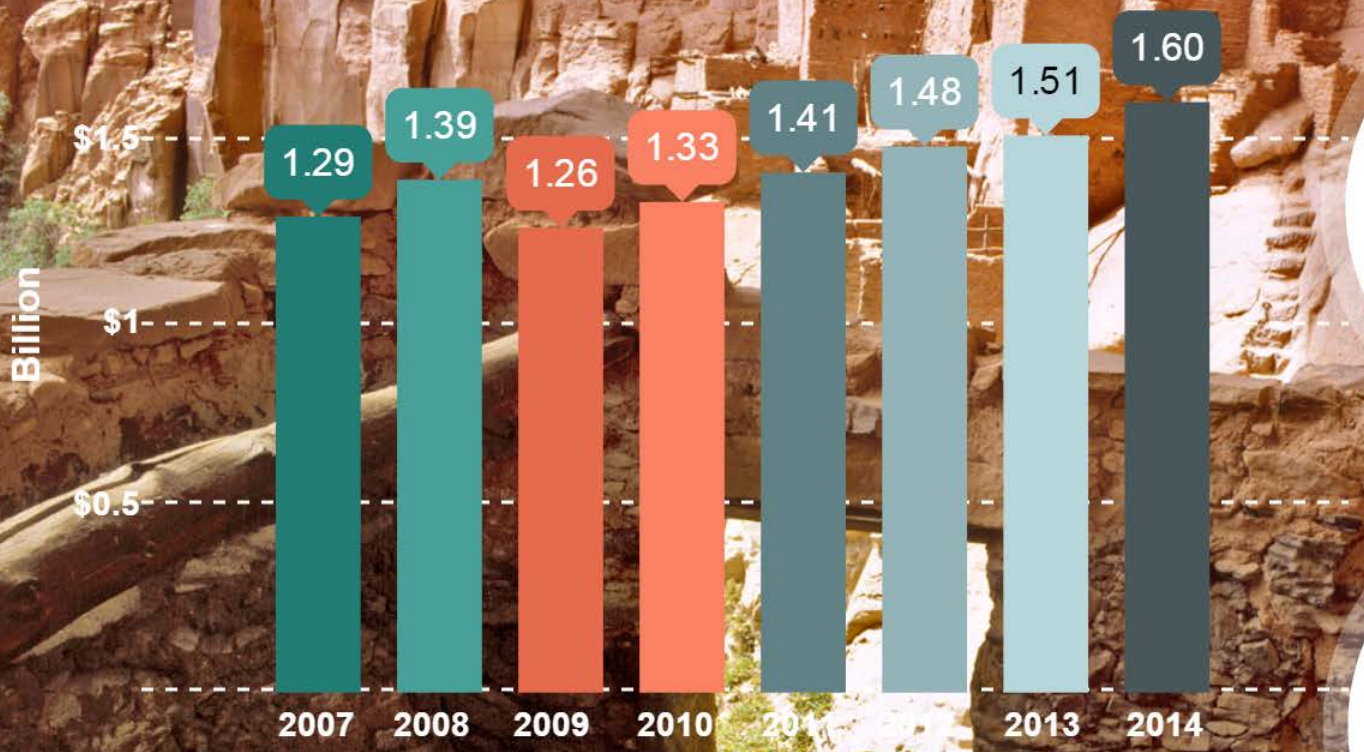
$130 million

state and local tax revenue

2.2% YOY

Source: Dean Runyan Associates, 2014

Direct Travel Spending in Northern Region



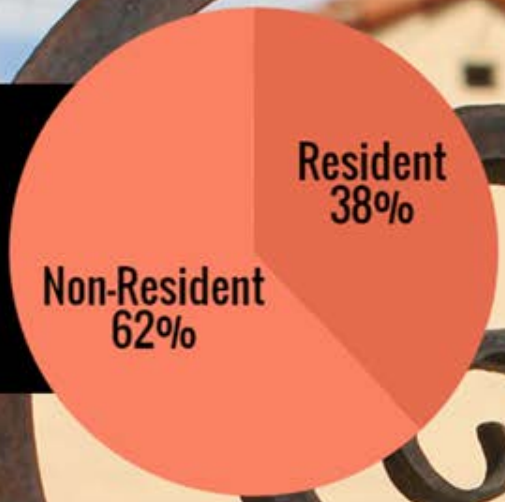
6.2%
YOY

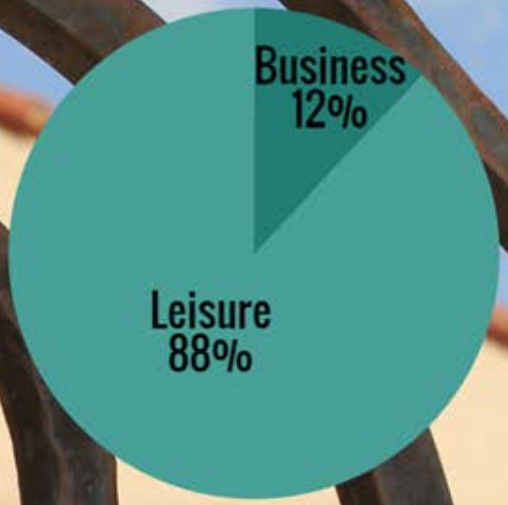
24.0%
Compared to 2007

Source: Dean Runyan Associates, 2014

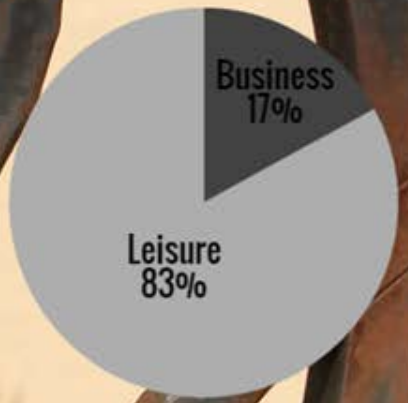
Domestic Overnight Visitation to Northern Region

Northern Region





Arizona



Source: Longwoods International, 2014

Northern Region Domestic Overnight Visitor Portrait

3.3	nights
3.1	persons per party
$644	trip expenditures*
78%	paid accommodations
$68,430	average household income
42.7	average age

Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Hiking/Backpacking

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Northern Region
2014 Indicator Performance

Lodging

58.8%
Occupancy
Up 3.6% YOY

$86.02
ADR
Up 3.2% YOY

$51.53
RevPAR
Up 7.7% YOY

Source: STR

Northern Region
2014 Indicator Performance

State Parks

285,339
Total Visitors

Down* -27% YOY

National Parks

9 million
Recreational Visits

Up 6.7% YOY

Airports

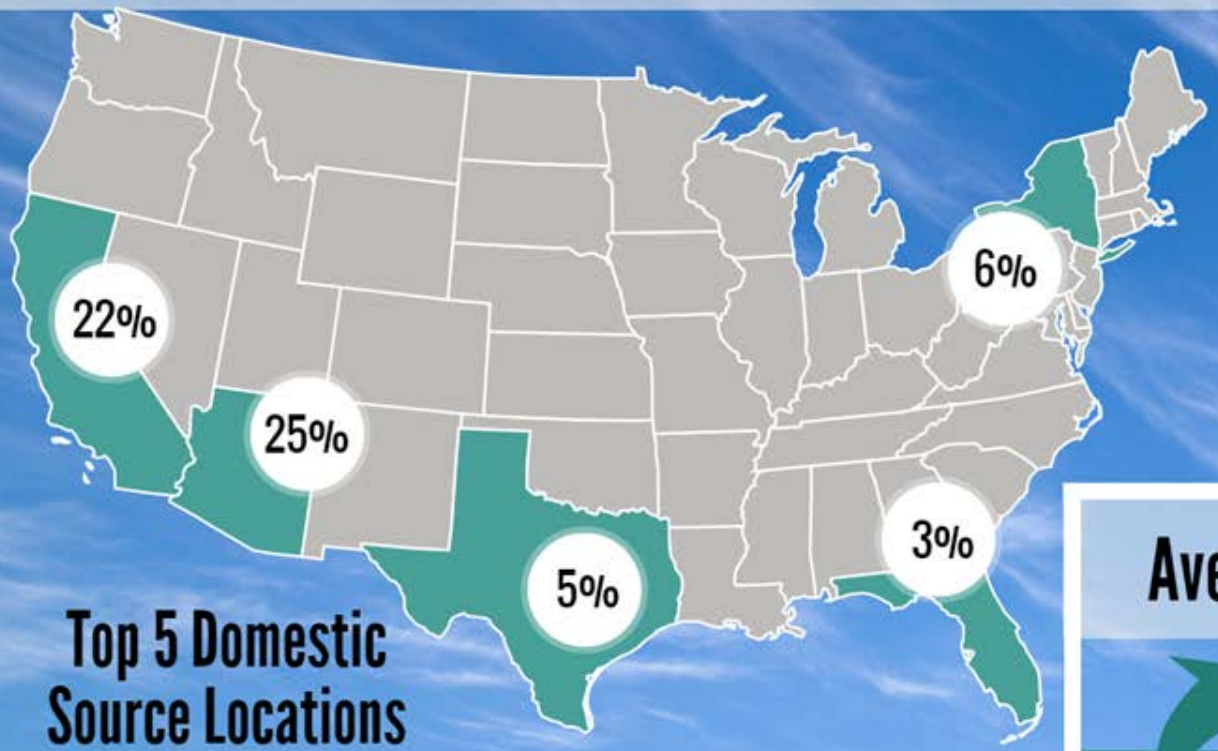
231,944
Passengers

Up 12% YOY

*Due to closure of Slide Rock SP after Slide Fire in Oak Creek Canyon

Source: NAU

Northern Region
May 2015 OTA Search & Book Trends



22%
Of all searches for Arizona

Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Florida

Source: nSight

Average Lead Time (Days)

Search to Book

Book to Stay

*For domestic travel to the Northern Region in May 2015

West Coast Region

(La Paz, Mohave and Yuma Counties)

5.0 million

Domestic Overnight Visitors

$1.4 billion

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014

$1.4 billion of direct spending generated...

$315 million

employment earnings

Up 1.8% YOY

13,180

industry jobs

Down -0.7% YOY

$97 million

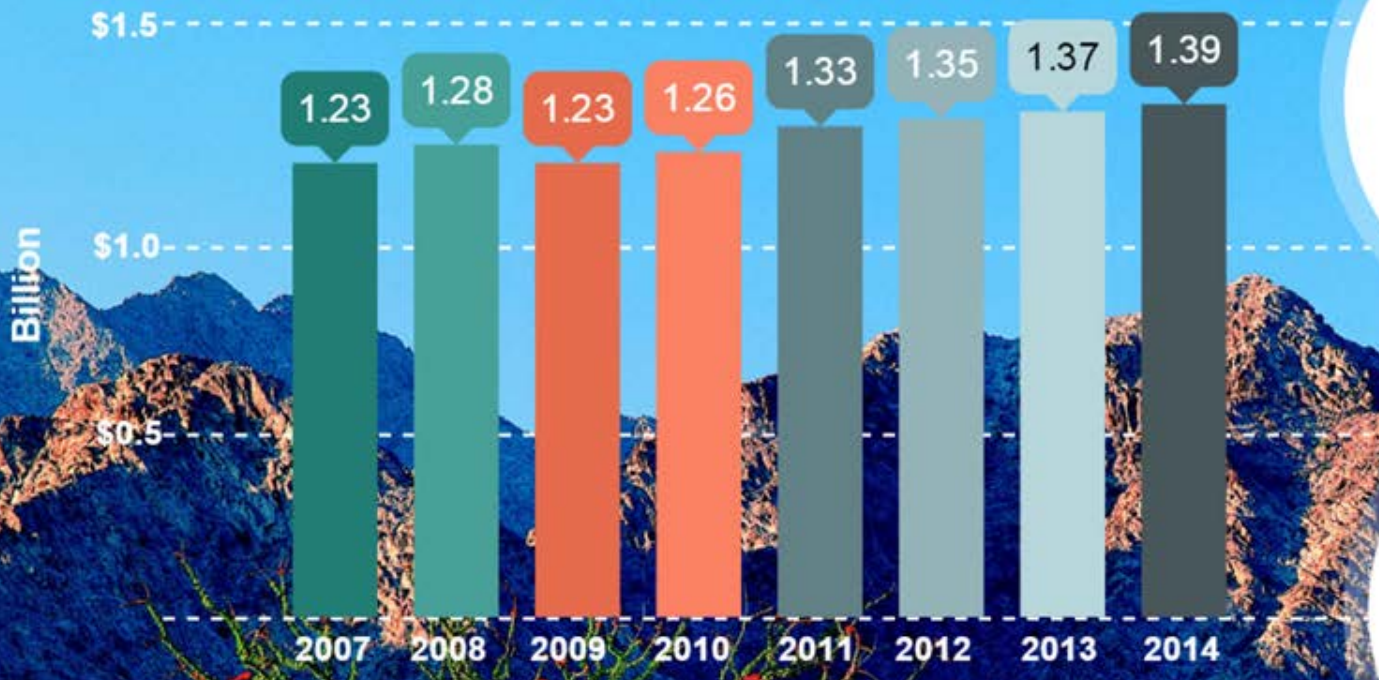
state and local tax revenues

Down* -8.5% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

Direct Travel Spending in West Coast Region

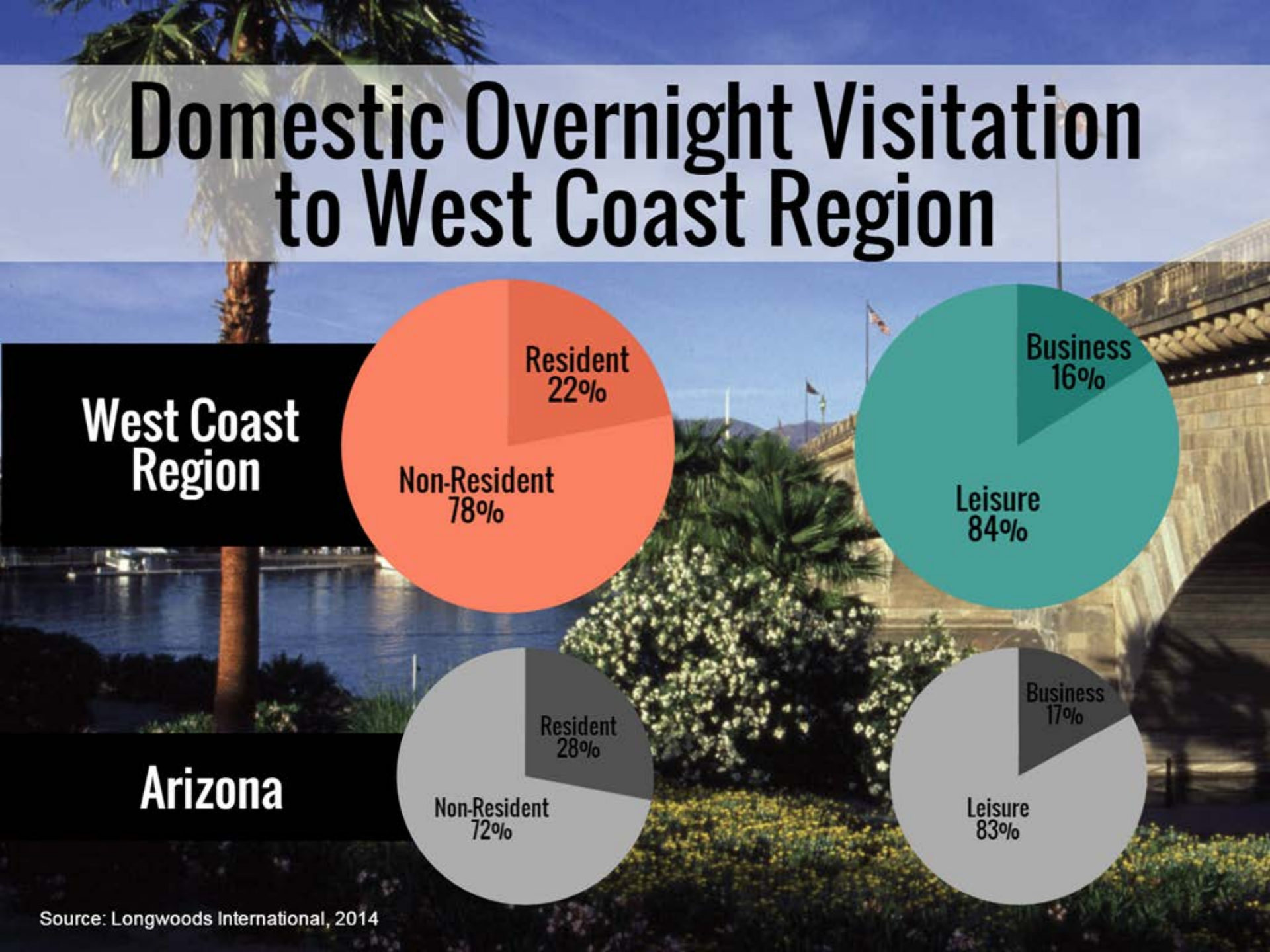


1.3%
YOY

13.0%
Compared to 2007

Source: Dean Runyan Associates, 2014

Domestic Overnight Visitation to West Coast Region



Source: Longwoods International, 2014

West Coast Region
Domestic Overnight Visitor Portrait

3.3	nights
3.1	persons per party
$537	trip expenditures*
78%	paid accommodations
$70,170	average household income
40.3	average age

Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Swimming
- Casino

Source: Longwoods International, 2014

*Does not include transportation to and from destination

West Coast Region
2014 Indicator Performance

Lodging

53.4%
Occupancy
Up 1.0% YOY

$69.86
ADR
Up 3.6% YOY

$37.27
RevPAR
Up 4.8% YOY

Source: STR

West Coast Region
2014 Indicator Performance

State Parks

686,785
Total Visitors

Up 9.8% YOY

National Parks

2 million
Recreational Visits

Up 8.5% YOY

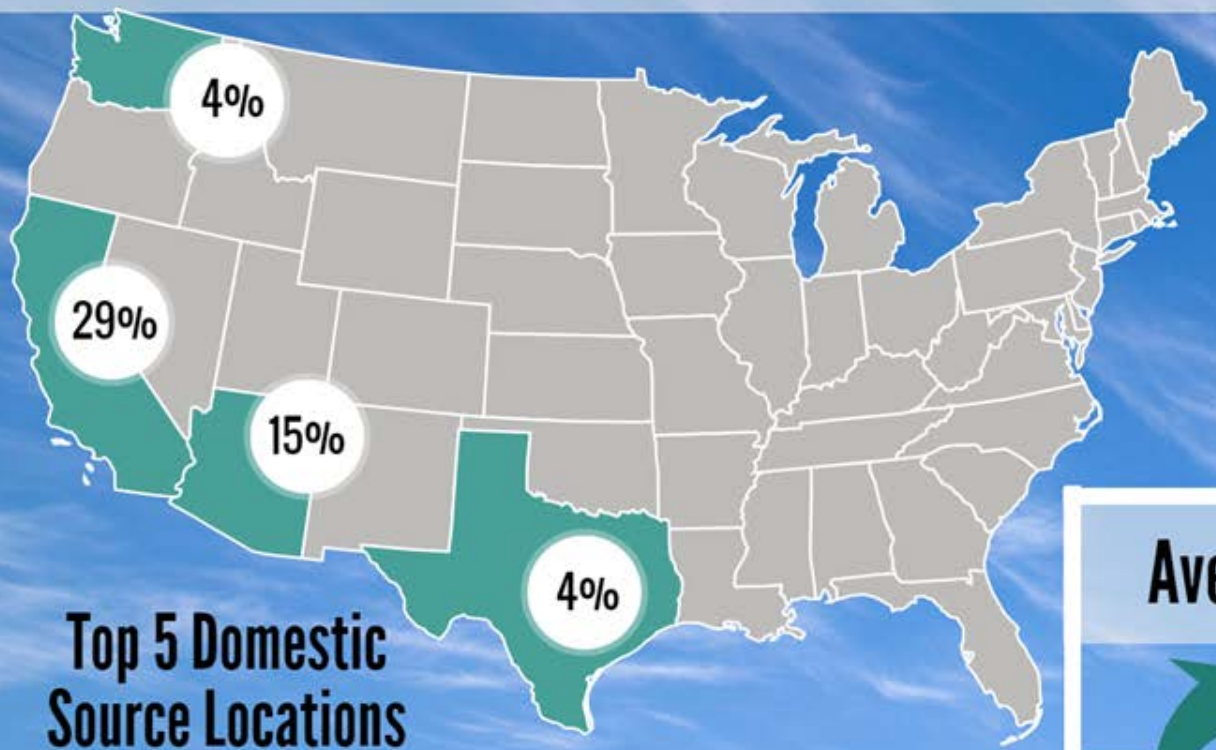
Airports

392,010
Passengers

Up 3.2% YOY

Source: NAU

West Coast Region
May 2015 OTA Search & Book Trends

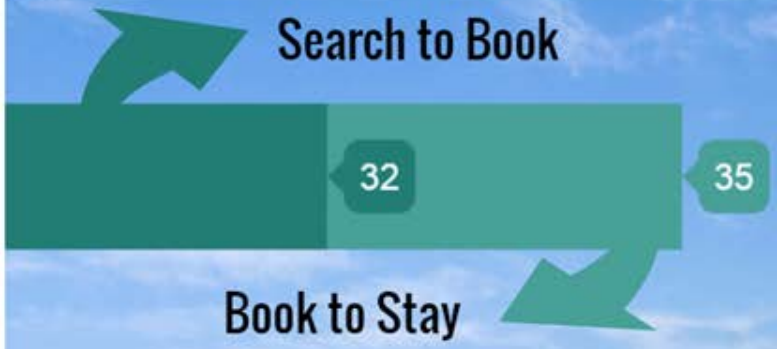


4.1%
Of all searches for Arizona

Top 5 Domestic Source Locations

1. California
2. Arizona
3. Texas
4. Washington

Average Lead Time (Days)



*For domestic travel to the West Coast Region in May 2015

Source: nSight

North Central Region

(Gila and Yavapai Counties)

5.0 million

Domestic Overnight Visitors

$1.0 billion

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014

$1.0 billion of direct spending generated...

$249 million

employment earnings

Up 3.2% YOY

10,750

industry jobs

Up 1.9% YOY

$75 million

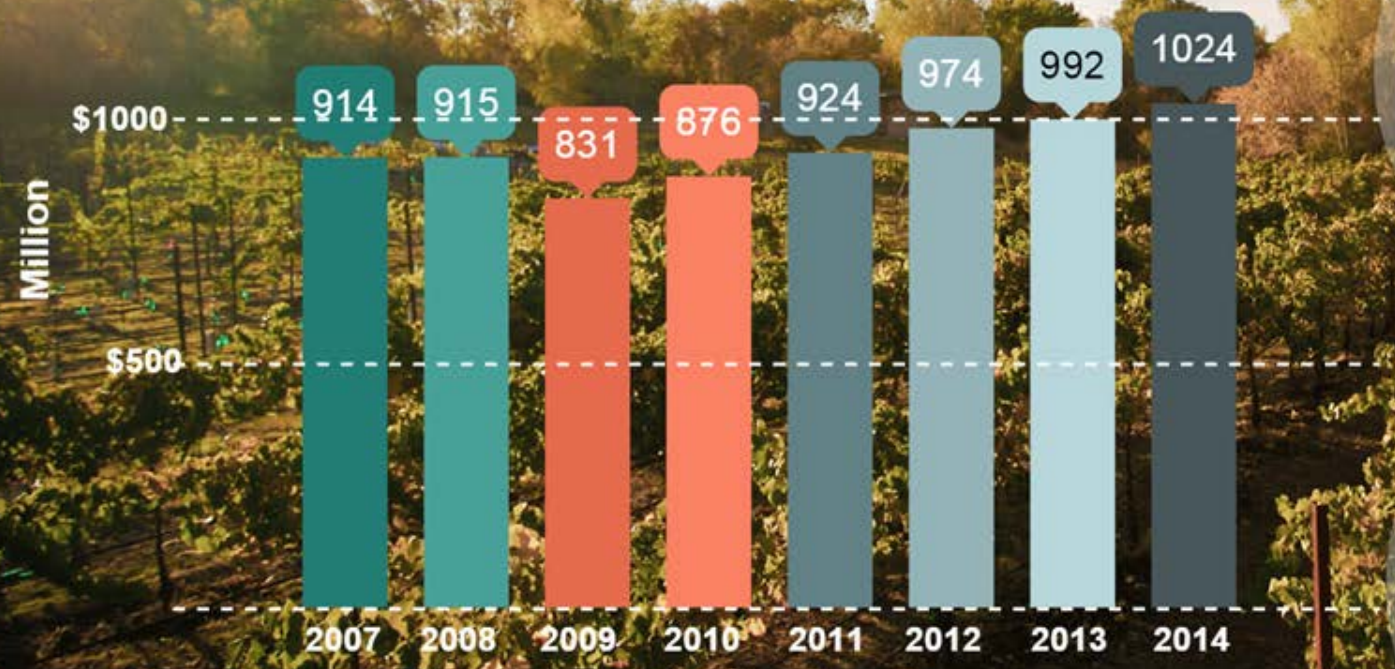
state and local tax revenues

Down* -1.3% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

Direct Travel Spending in North Central Region



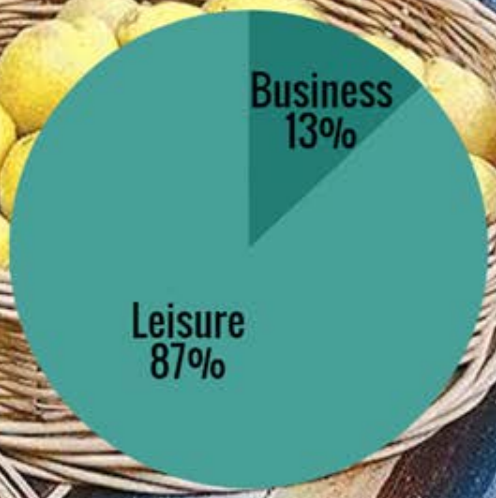
3.2%
YOY

11.6%
Compared to 2007

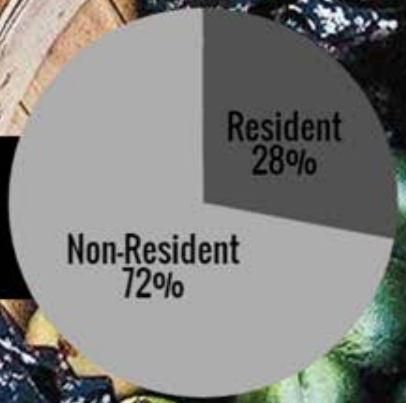
Source: Dean Runyan Associates, 2014

Domestic Overnight Visitation to North Central Region

North Central Region



Arizona



Source: Longwoods International, 2014

North Central Region Domestic Overnight Visitor Portrait

4.0	nights
3.0	persons per party
$678	trip expenditures*
72%	paid accommodations
$71,690	average household income
45.3	average age

Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Hiking/Backpacking

Source: Longwoods International, 2014

*Does not include transportation to and from destination

North Central Region
2014 Indicator Performance

Lodging

56.1%
Occupancy
Up 1.9% YOY

$103.02
ADR
Up 3.4% YOY

$58.95
RevPAR
Up 5.9% YOY

Source: STR

North Central Region
2014 Indicator Performance

State Parks

393,586
Total Visitors

Up 10.4% YOY

National Parks

572,635
Recreational Visits

Up 11.3% YOY

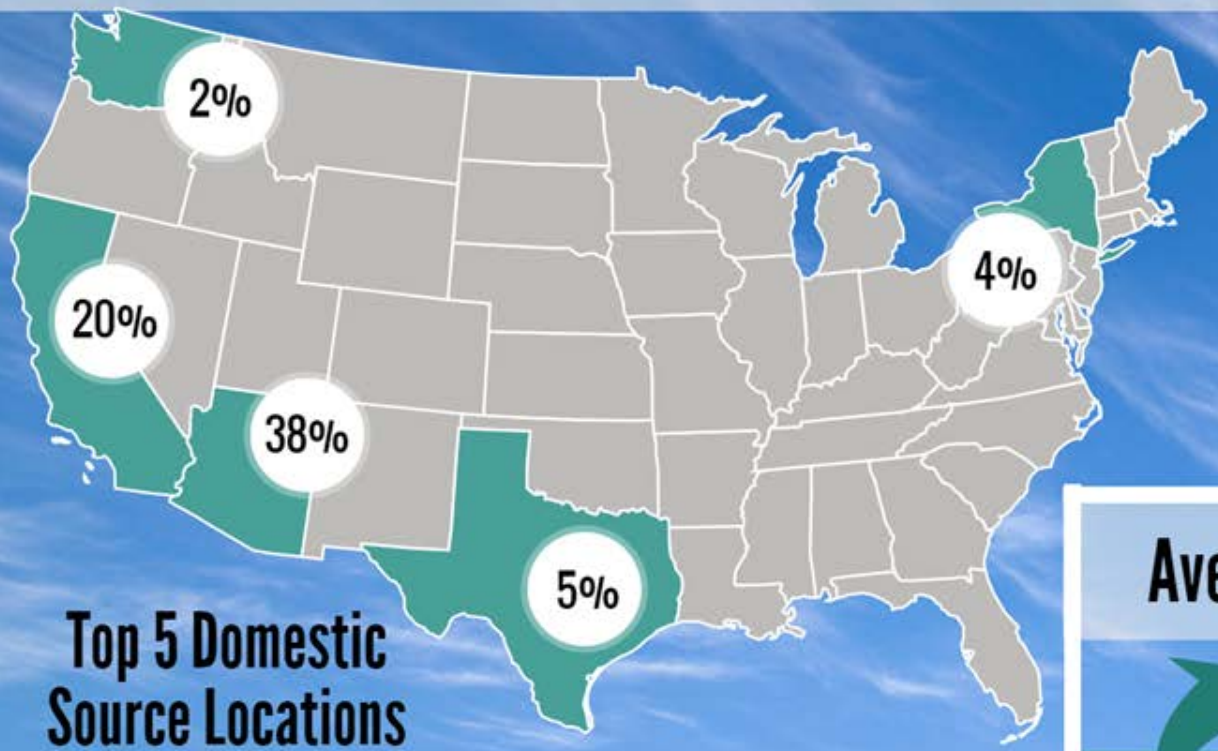
Airports

7,786
Passengers

Down 26.2% YOY

Source: NAU

North Central Region
May 2015 OTA Search & Book Trends



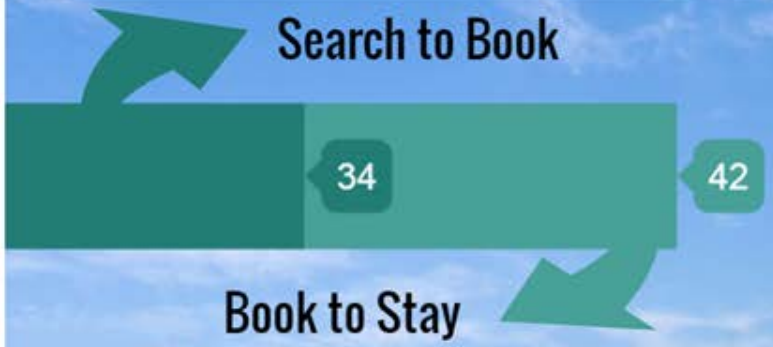
12%
Of all searches for Arizona

Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Washington

Source: nSight

Average Lead Time (Days)



*For domestic travel to the North Central Region in May 2015

Tucson & Southern Region

(Cochise, Graham, Greenlee, Pima and Santa Cruz Counties)

6.0 million

Domestic Overnight Visitors

$3.6 billion

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014

$3.6 billion of direct spending generated...

$780 million

employment earnings

Up 6.8% YOY

30,500

industry jobs

Up 3.4% YOY

$239 million

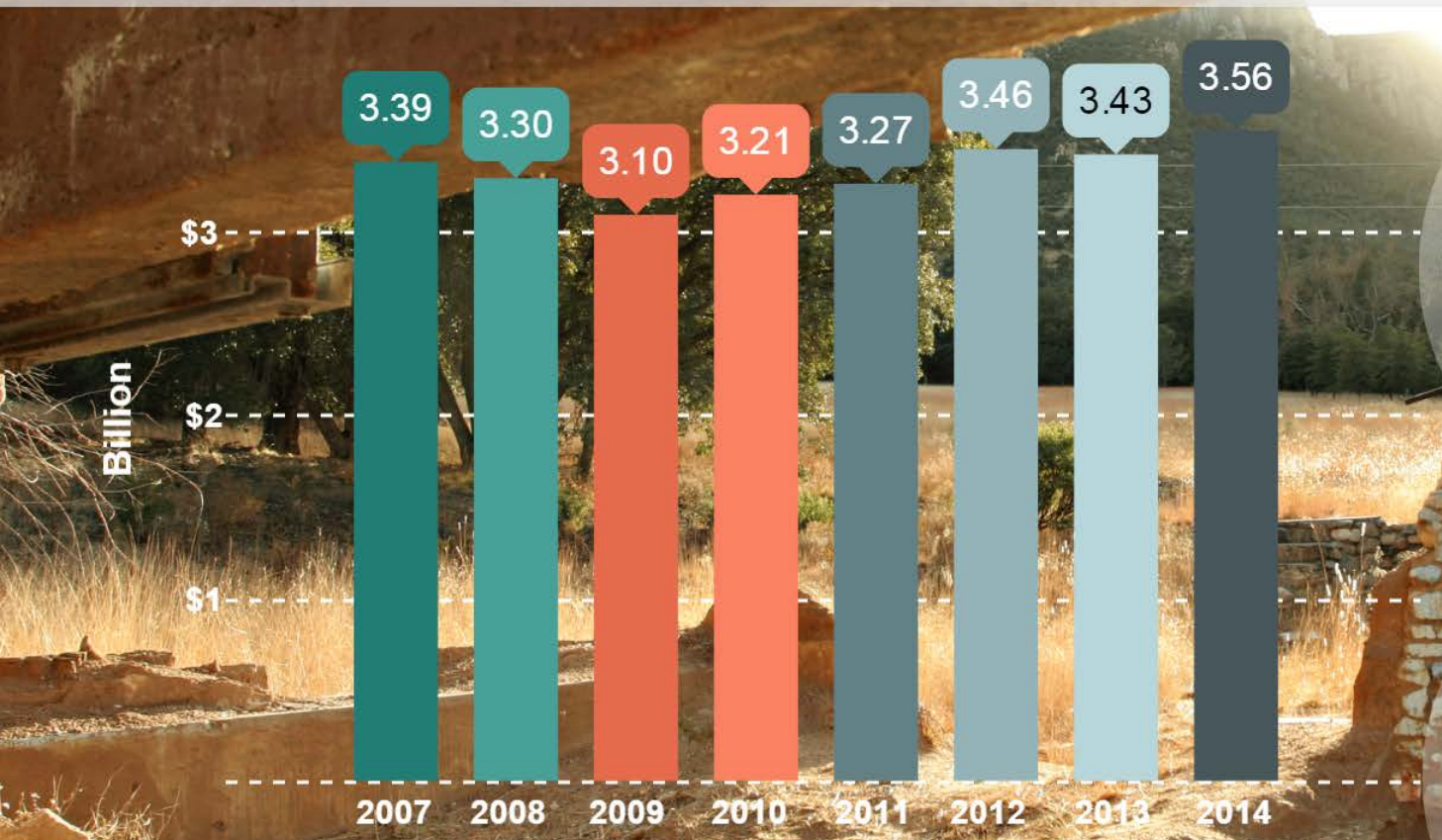
state and local tax revenues

Down* -10.8% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

Direct Travel Spending in Tucson & Southern Region



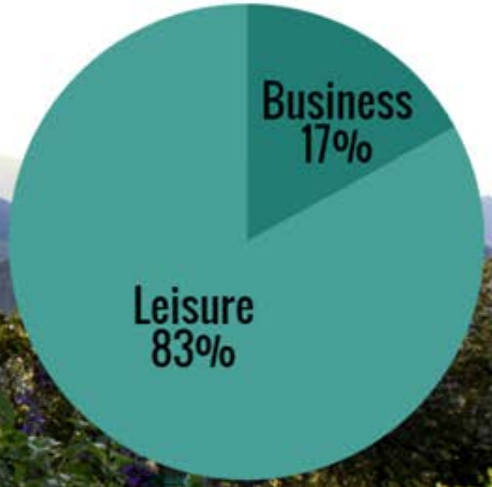
↑ 3.9%
YOY

↑ 5.0%
compared to 2007

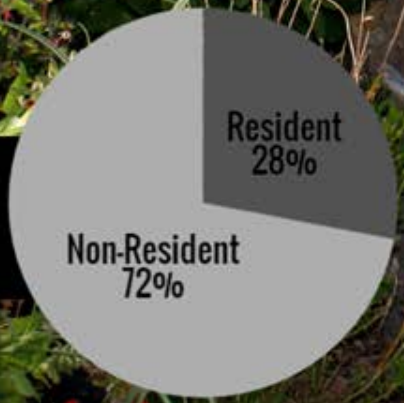
Source: Dean Runyan Associates, 2014

Domestic Overnight Visitation to Tucson & Southern Region

Tucson & Southern Region



Arizona



Source: Longwoods International, 2014

Tucson & Southern Region Domestic Overnight Visitor Portrait

4.4	nights
2.6	persons per party
$730	trip expenditures*
60%	paid accommodations
$67,060	average household income
47.1	average age

Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Swimming

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Tucson & Southern Region 2014 Indicator Performance

Lodging

52.8%
Occupancy
Up 2.7% YOY

$79.19
ADR
Up 3.4% YOY

$42.28
RevPAR
Up 5.9% YOY

Source: STR

Tucson & Southern Region 2014 Indicator Performance

State Parks

628,795
Total Visitors

Up 6.8% YOY

National Parks

1.09 million
Recreational Visits

Up 3.0% YOY

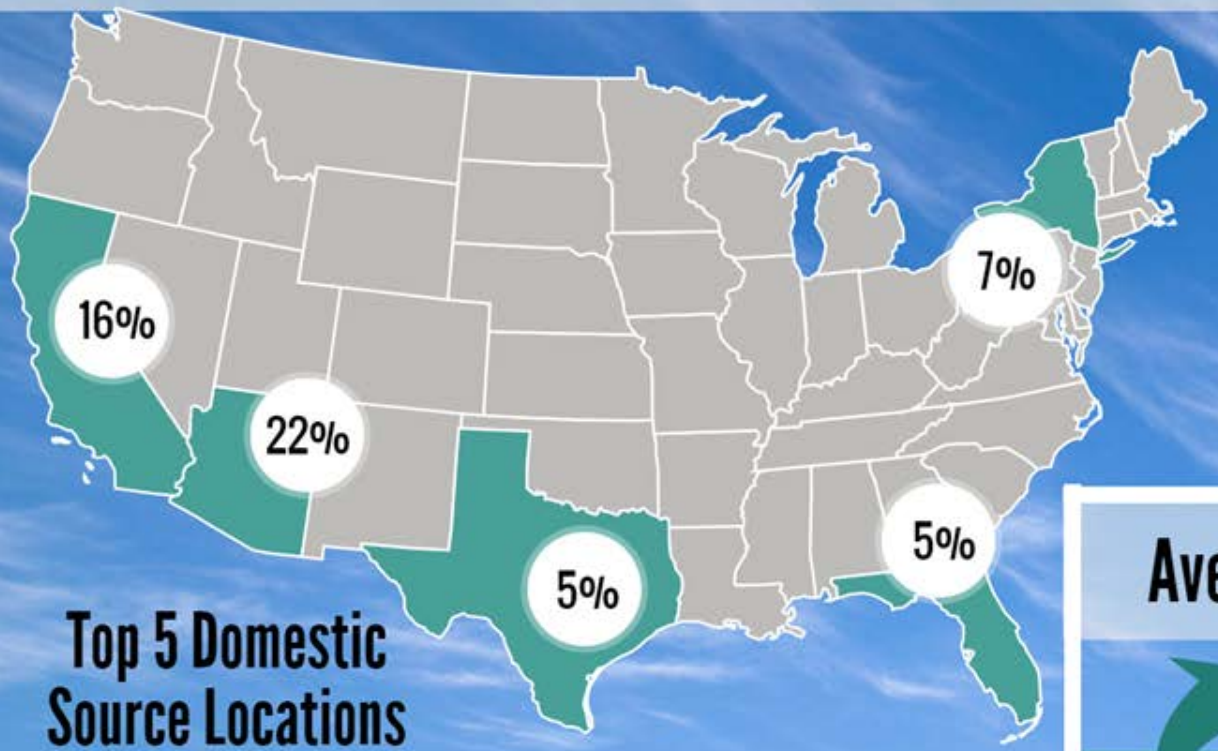
Airports

3.25 million
Passengers

Up 0.3% YOY

Source: NAU

Tucson & Southern Region May 2015 OTA Search & Book Trends



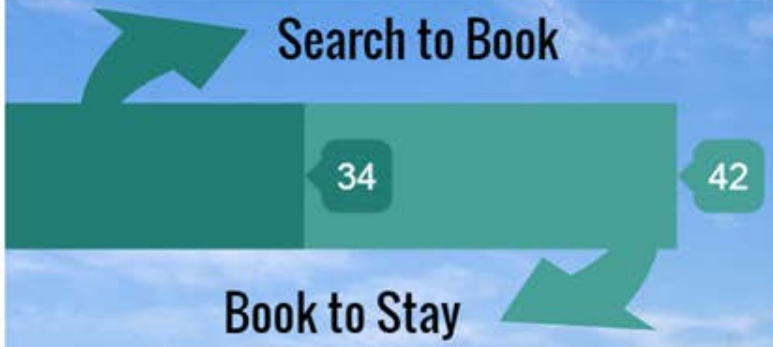
9.4%
Of all searches for Arizona

Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Florida

Source: nSight

Average Lead Time (Days)



*For domestictravel to Tucson & Southern Region in May 2015

Phoenix & Central Region

(Maricopa and Pinal Counties)

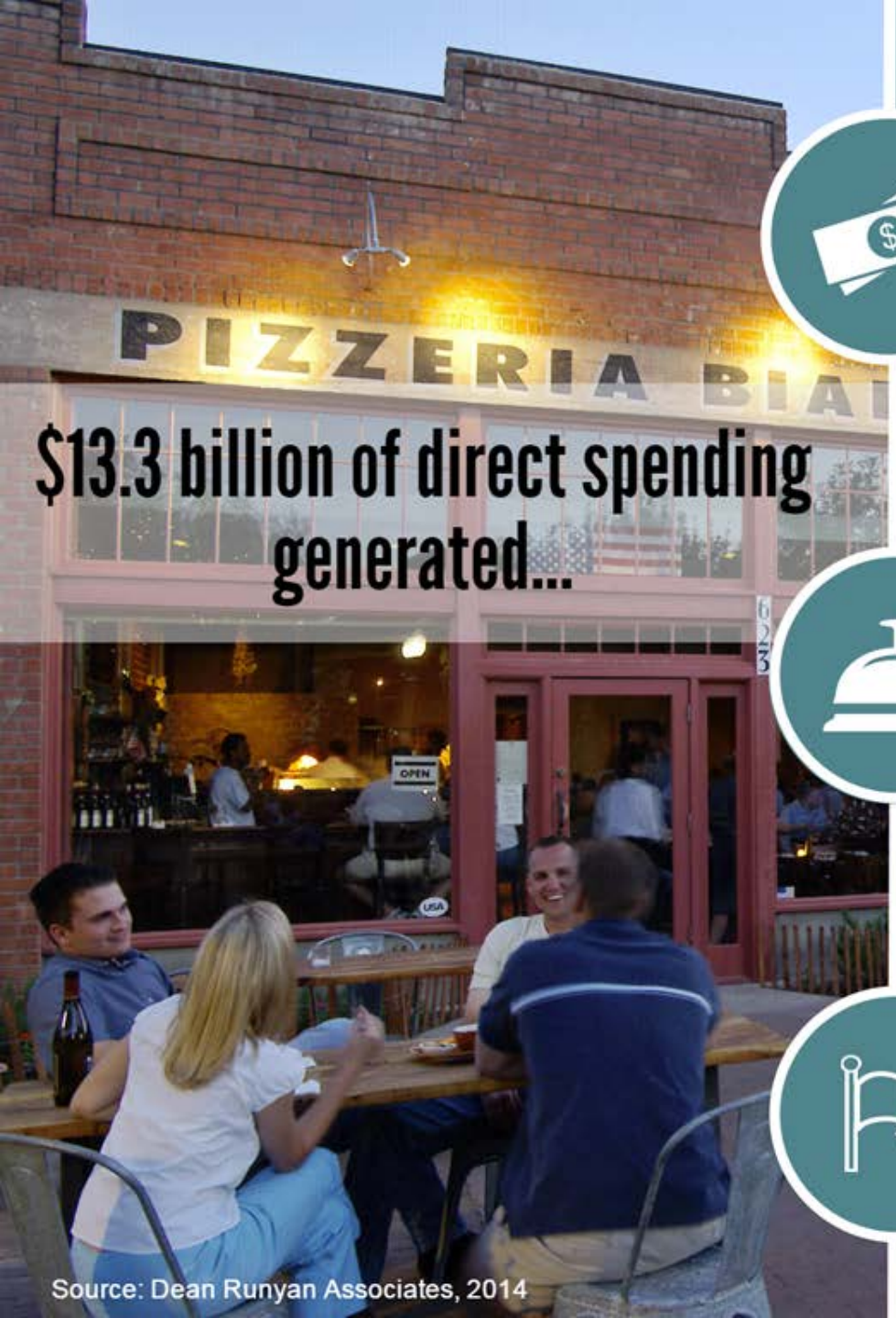
19.0 million

Domestic Overnight Visitors

$13.3 billion

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014



$13.3 billion of direct spending generated...

$4.1 billion
employment earnings

Up 6.9% YOY

100,150
industry jobs

Up 5.0% YOY

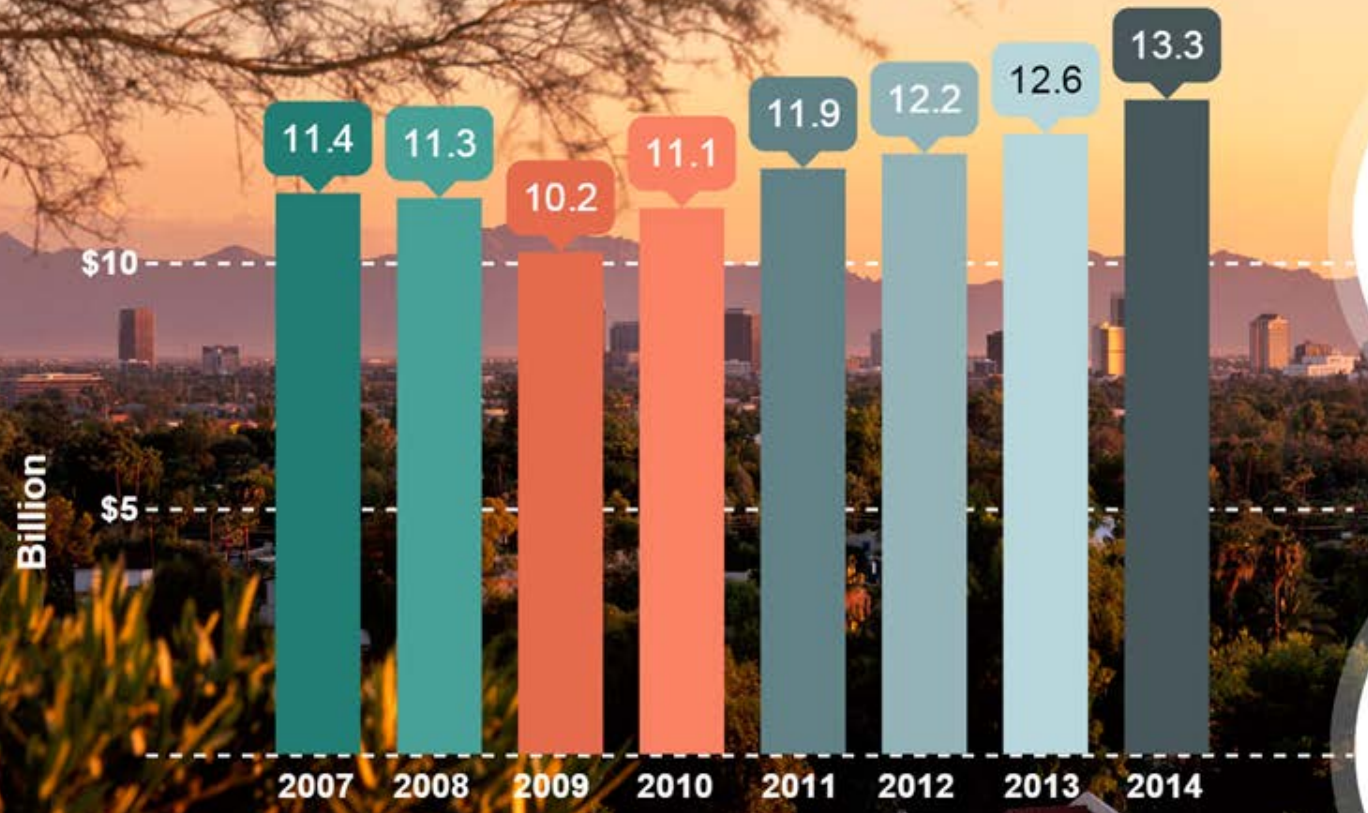
$991 million
state and local tax revenues

Down* -0.5% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

Direct Travel Spending in Phoenix & Central Region



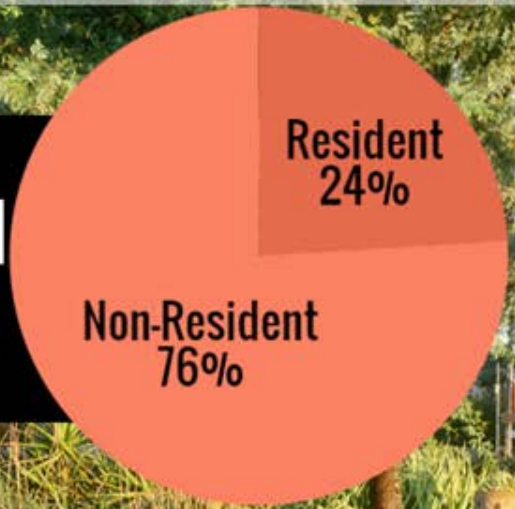
↑ 6.1% YOY

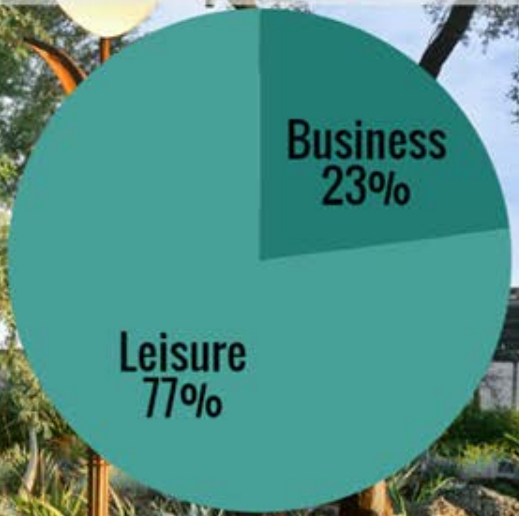
↑ 16.7% compared to 2007

Source: Dean Runyan Associates, 2014

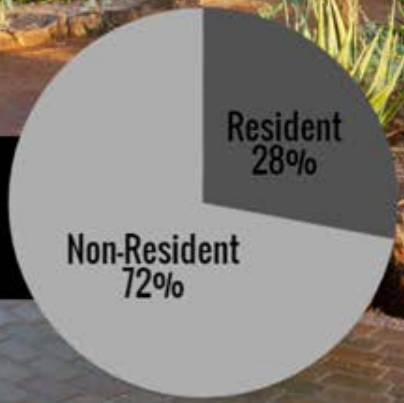
Domestic Overnight Visitation to Phoenix & Central Region

Phoenix & Central Region





Arizona



Source: Longwoods International, 2014

Phoenix & Central Region Domestic Overnight Visitor Portrait

4.4	nights
2.6	persons per party
$812	trip expenditures*
62%	paid accommodations
$72,540	average household income
46.2	average age

Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Swimming

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Phoenix & Central Region 2014 Indicator Performance

Lodging

58.8%
Occupancy
Up 3.3% YOY

$97.16
ADR
Up 4.5% YOY

$57.93
RevPAR
Up 8.4% YOY

Source: STR

State Park Background photo

Phoenix & Central Region 2014 Indicator Performance

State Parks

282,700

Total Visitors

Up 3.9% YOY

National Parks

63,698

Recreational Visits

Down 2.2% YOY

Airports

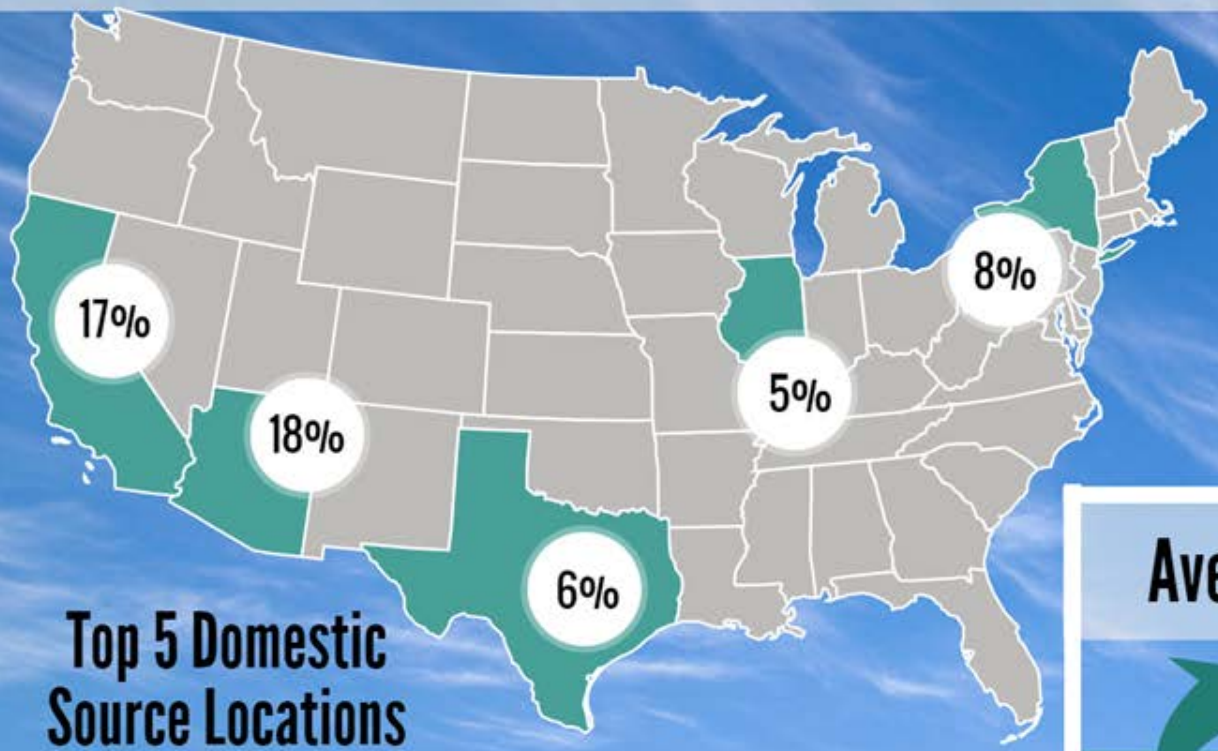
43.4 million

Passengers

Up 4.0% YOY

Source: NAU

Phoenix & Central Region May 2015 OTA Search & Book Trends



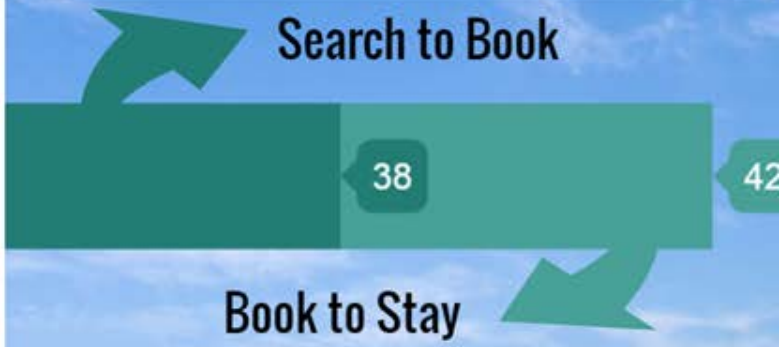
53%
Of all searches for Arizona

Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Illinois

Source: nSight

Average Lead Time (Days)



*For domestic travel to the Phoenix & Central Region in May 2015

Arizona Super Bowl Visitor VisaVUE Spending Trends

Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Methodology

OBJECTIVE

Capture Visa card spending activity throughout Maricopa County and at major events/venues related to Super Bowl XLIX.

TIME PERIOD

Saturday, January 24, 2015 through Wednesday, February 3, 2015.

COMPARISON

Year-over-year comparison (Saturday, January 25, 2014 through Wednesday, February 4, 2014).

Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

ADVANTAGES

Based on actual domestic visitor Visa spending in Maricopa County

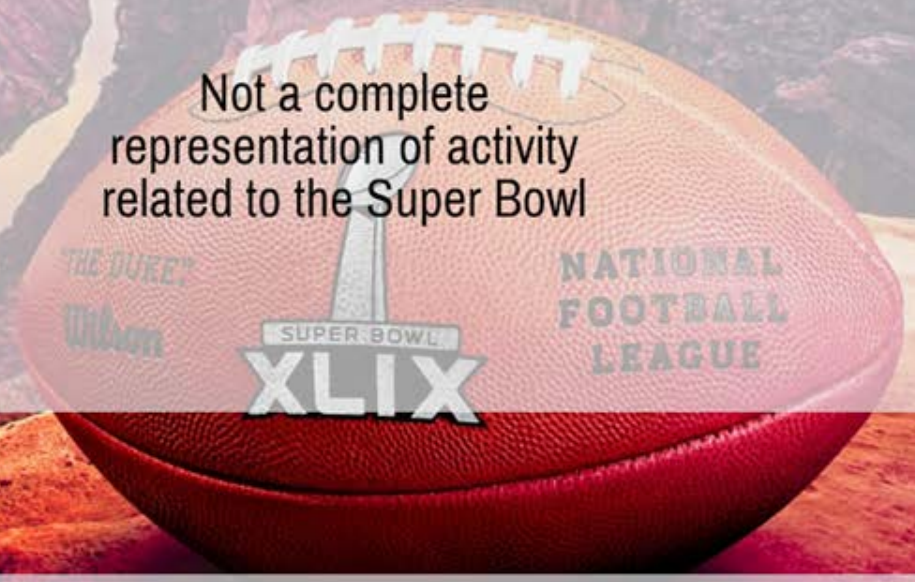
Can evaluate spend activity by geographic segment

Details available by Merchant Category Spending

LIMITATIONS

Cannot be used as Economic Impact

Not a complete representation of activity related to the Super Bowl



Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

Overall - Maricopa County*

$59 million

lift in Visa Card Spending

7.8% ↑

in Year-over-year (YOY) Visa Card Spending

* Reflects all Visa Card Spending, including Maricopa County residents.

Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

Overall - Maricopa County (Out-of-area Origin)

$24 million

lift in Visitor Visa Card Spending

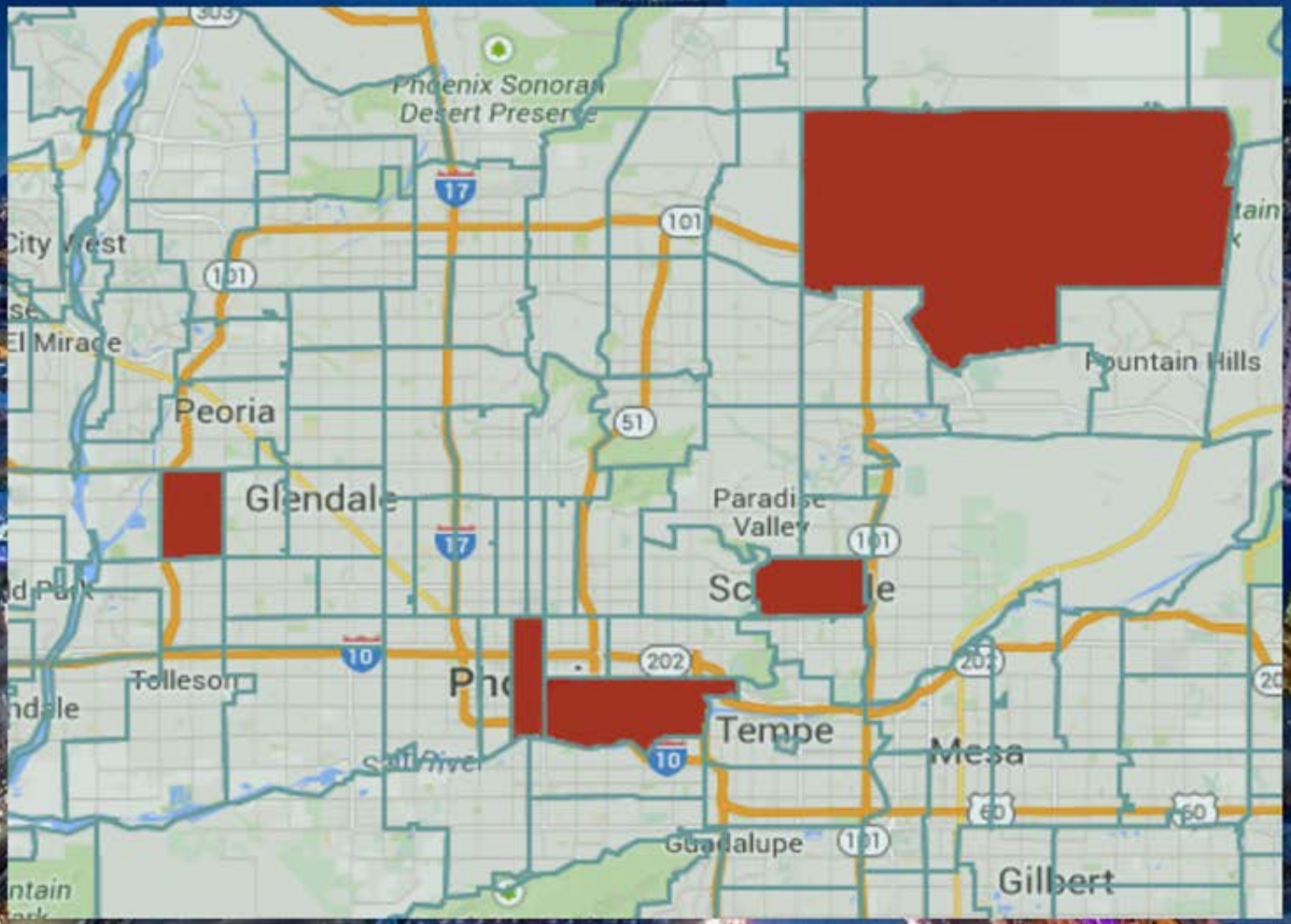
18.2% ↑

in Year-over-year (YOY) Visitor Visa Card Spending

* Reflects out-of-area origin only. Maricopa County data was removed.

Source: AOT Research/VisaVUE

Map of Geographic Segments Represented



Source: Google Maps

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

Geographic Segments

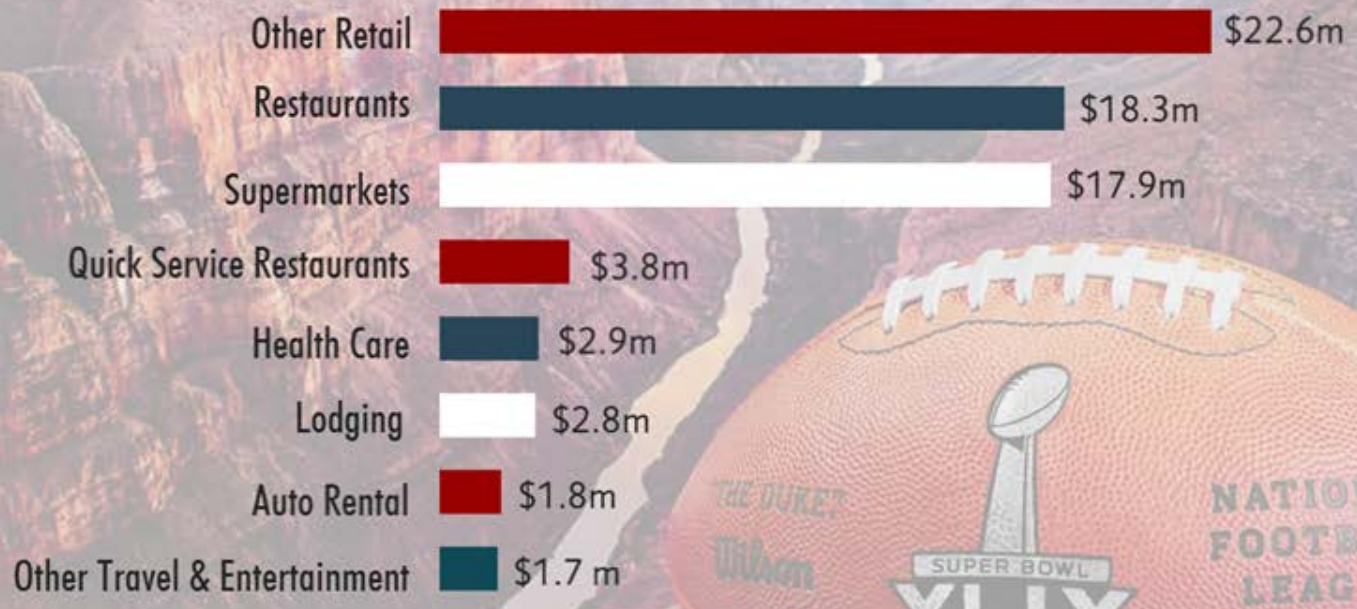
	Out-of-Area		Total (with Phoenix)	
Visitor Visa Card Spending (Jan 24 - Feb 3, 2015)	Spending YOY Growth	Spending Difference (lift)	Spending YOY Growth	Spending Difference (lift)
Glendale	143.4%	$1.6 million	59.3%	$3.2 million
Phoenix Downtown	168.0%	$4.4 million	88.4%	$8.0 million
Scottsdale Downtown	45.0%	$3.1 million	19.8%	$5.0 million
Phoenix Open-Scottsdale	23.8%	$800,000	12.6%	$1.2 million
Phoenix Sky Harbor	22.9%	$450,000	15.1%	$5.8 million

Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

Top Merchant Categories Spending Lift



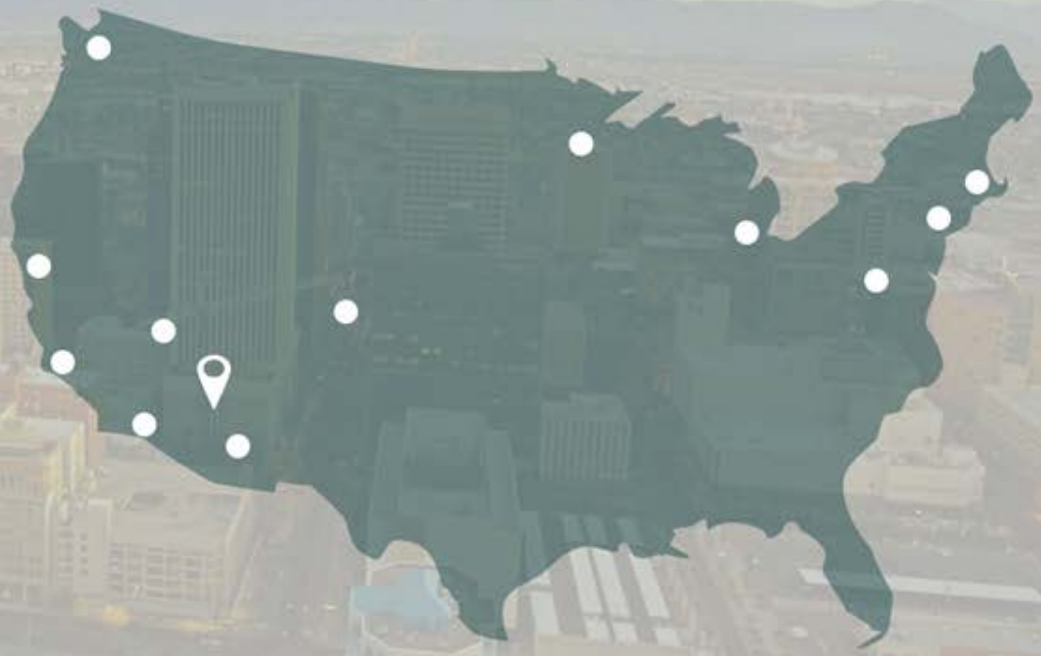
Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

Metropolitan Statistical Areas (MSAs) Spending Lift

#1 Los Angeles, CA: $9.2 million
#2 Seattle, WA: $8.1 million
#3 Chicago, IL: $7.2 million
#4 New York City, NY: $6.1 million
#5 Denver, CO: $5.0 million
#6 Tucson, AZ: $4.9 million
#7 Minneapolis, MN: $4.5 million
#8 San Francisco, CA $4.2 million
#9 Washington, DC: $3.9 million
#10 Las Vegas, NV: $3.3 million
#11 San Diego, CA: $3.0 million
#12 Boston, MA: $2.9 million



Source: AOT Research/VisaVUE

Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

Metropolitan Statistical Areas (MSAs) Spending

YOY GROWTH

#1 Seattle	137.6%
#2 Boston	70.9%
#3 NYC	54.6%

Source: AOT Research/VisaVUE

Competitive Analysis of AOT's Budget

1. Tourism industry is essential to economic development
2. Arizona's tourism market competiveness over time
3. Benchmarking AOT's budget against other destinations
4. Recommending the optimal competitive budget for AOT
5. Potential benefits; scenario economic impact analysis

Competitor Tourism Budgets

Source: U.S. Travel Association - Survey of U.S. State Tourism Office Budgets (2013-2014)

ARIZONA
OFFICE OF TOURISM

Thank You!

AOT Research Team:

Karen Churchard
Melissa Elkins
Colleen Floyd

tourism.az.gov