

Arizona Travel Impacts

2000-2017p

June 2018

Prepared for the

Arizona Office of Tourism
Phoenix, Arizona

Arizona Travel Impacts 2000-2017p

Arizona Office of Tourism

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Executive Summary

This report describes the economic impacts of travel to and through Arizona and the state's fifteen counties. The estimates of the direct impacts associated with traveler spending in Arizona were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The estimates for Arizona are generally comparable to the U.S. Travel and Tourism Satellite Accounts produced by the Bureau of Economic Analysis. The estimates of spending, earnings, employment and tax receipts are also used as input data to derive estimates of other economic measures, including gross domestic product (GDP) and secondary effects of the travel industry. The estimates for 2017 are *preliminary*, symbolized by "p" where appropriate. These estimates supersede all prior reports.

Another Consecutive Year of Strong Growth for the Arizona Travel Industry

The Arizona travel industry had its third consecutive year of exceptionally strong growth, following mostly modest increases in spending and related impacts since the recession of 2007 to 2009. This is the eighth consecutive year of industry growth.

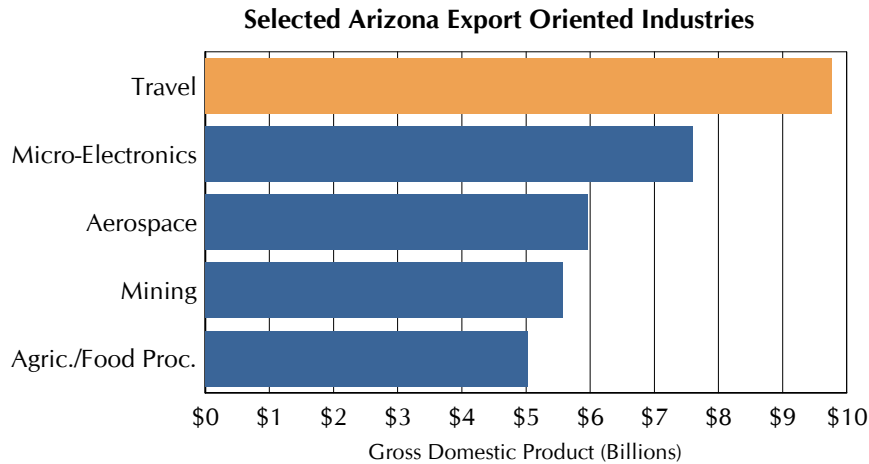
- **Spending.** Total direct travel spending in Arizona was \$22.7 billion in 2017p. Non-transportation visitor spending increased by 6.3 percent, following a 3.3 percent increase from 2015 to 2016. Real travel spending increased by 5.0 percent in 2017p.
- **Travel Activity.** Visitor air travel on domestic flights to Arizona destinations increased by 5.8 percent in 2017p, following a 7 percent increase the preceding year.[1] Room demand increased by 2.8 percent for 2017, following a 2.9 percent increase the preceding year.[2]
- **Employment.** Direct travel-generated employment was 187,100 in 2017p. This represents an addition of 2,900 jobs, an increase of 1.6 percent.
- **Secondary Impacts.** The re-spending of travel-related revenues by businesses and employees creates secondary impacts. In 2017p, the secondary impacts were 160,800 jobs with \$7.3 billion in earnings.
- **GDP.** The Gross Domestic Product of the travel industry was \$9.8 billion in 2017p. The travel industry and the microelectronics industry have been the top two export-oriented industries in the state in recent years.

[1]. U.S. Department of Transportation Origin and Destination Survey.

[2]. STR, Inc.

The Arizona Travel Industry is a Leading Export Oriented Industry

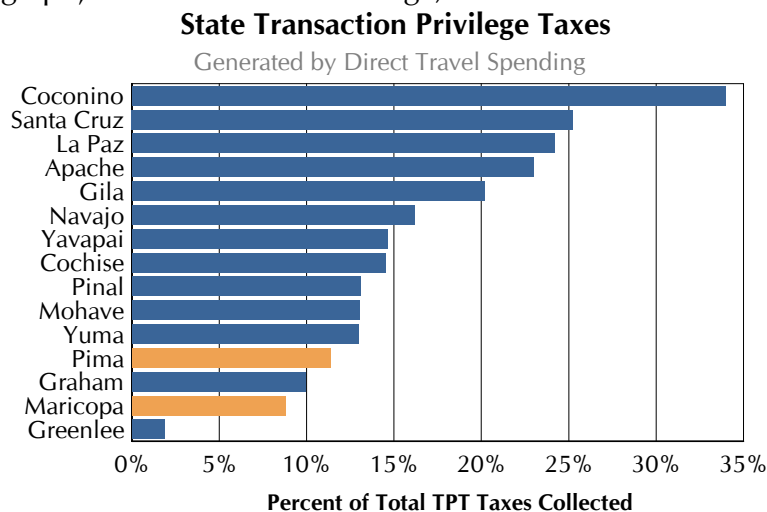
Travel and tourism is one of the most important **“export-oriented”** industries in Arizona. Spending by visitors generates sales in lodging, food services, recreation, transportation and retail businesses - the “travel industry.” These sales support jobs for Arizona residents and contribute tax revenue to local and state governments. Travel is especially important in the non-metropolitan areas of the state, where manufacturing and traded services are less prevalent.



Note: Preliminary 2017 estimates by Dean Runyan Associates. Agriculture includes food and beverage processing industries.

The Travel Industry Generates Tax Benefits for Arizona Residents

In 2017p, the travel industry generated \$1,293 in local (\$389 tax receipts), state (\$357 tax receipts), and federal (\$547 tax receipts) taxes for each Arizona household. In 2017p, more than 7 percent of all local and state tax revenues were generated by the travel industry. The tax revenue impacts are relatively more important in non-urban counties (see graph, urban counties in orange).



Preface

The purpose of this study is to document the economic significance of the travel industry in Arizona from 2000 to 2017. These findings show the level of travel spending by visitors traveling to and within the state, and the impact this spending had on the economy in terms of earnings, employment and tax revenue.

Dean Runyan Associates prepared this study for the Arizona Office of Tourism. Dean Runyan Associates has specialized in research and planning services for the travel, tourism and recreation industry since 1984. With respect to economic impact analysis, the firm developed and currently maintains the Regional Travel Impact Model (RTIM), a proprietary computer model for analyzing travel economic impacts at the state, regional and local level. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research and travel and tourism planning.

Many individuals and organizations provided data and assistance for this report. State agencies include the Department of Revenue, Commerce Authority, Gaming Commission and State Parks. Information was also provided by the Eller College of Management at the University of Arizona and the Arizona Hospitality Research and Resource Center, a unit of Alliance Bank Economic Policy Institute at Northern Arizona University. Federal agencies that provided essential data for this report include the Bureau of Economic Analysis, the Department of Labor, the Department of Transportation, the U.S. Forest Service, and the National Park Service.

Special thanks are due to Colleen Floyd, Director of Research, and Kari Roberg, Research Manager for the Arizona Office of Tourism. Without their support and assistance, this report would not have been possible.

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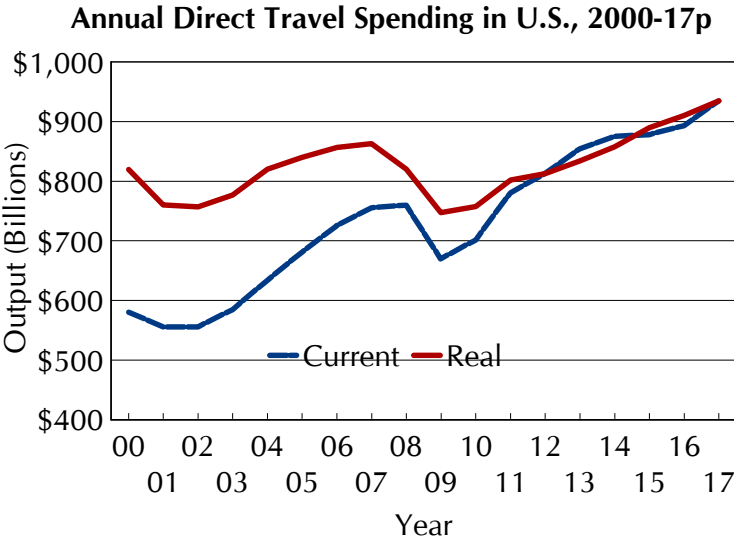
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I. NATIONAL TRAVEL TRENDS

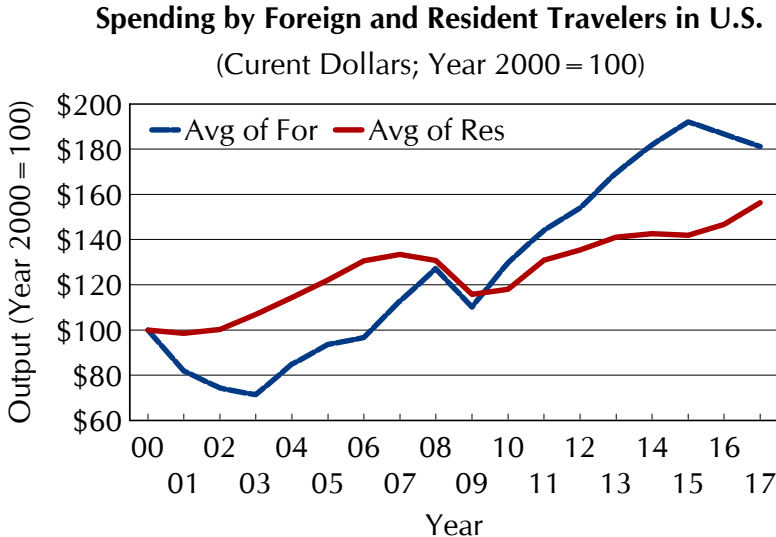


The national level data in this section focuses on visitor spending trends in current and real dollars, resident and foreign visitor spending in the U.S., and trends in travel-generated employment.

The following two graphs are derived from the Bureau of Economic Analysis Travel and Tourism Satellite Accounts*. Both graphs show direct tourism output for the United States - spending by resident and foreign visitors. The values are based on the first three quarters of the year.



Spending by resident and foreign visitors was \$933 billion in current dollars. This represents a 3.0 percent increase over 2016. When adjusted for changes in prices (real dollars), spending increased by 2.3 percent from 2016 to 2017p compared to a 4.7 percent increase for the preceding year.



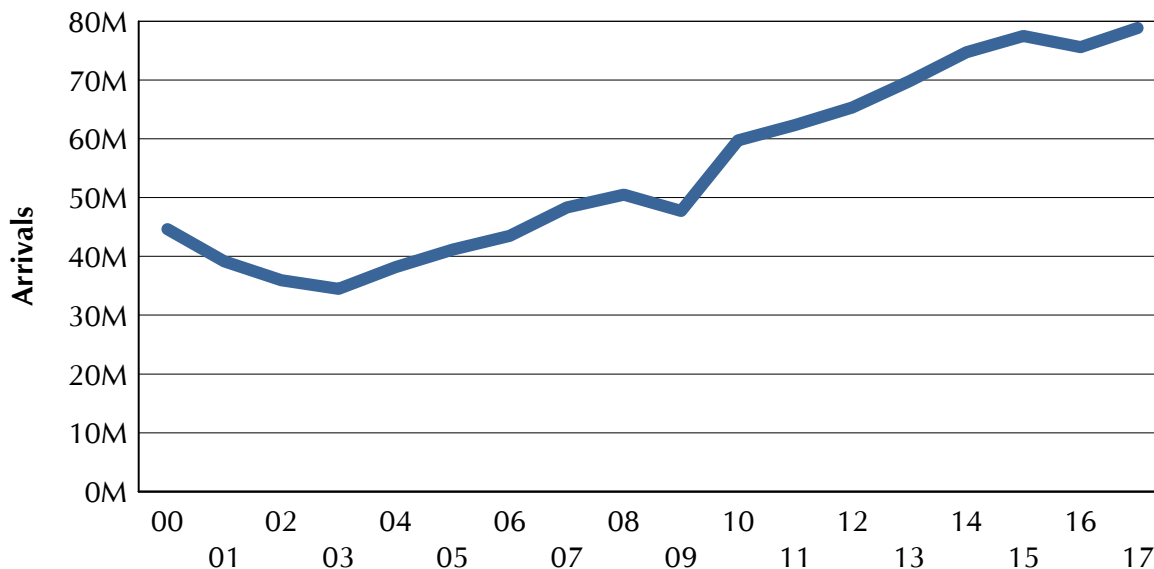
The bottom chart compares the change in current dollar spending by resident and foreign visitors since 2000. In 2017p, the increase in spending by resident visitors (4.7 percent) compares to a 2.0 percent decrease in non-resident spending. Visitor spending by non-residents decreased by 3.2 percent from 2015 to 2016.

Note: Foreign visitor spending does not include expenditures on health and educational services or expenditures by short term seasonal workers.

*See <http://www.bea.gov/industry/index.htm#satellite>.

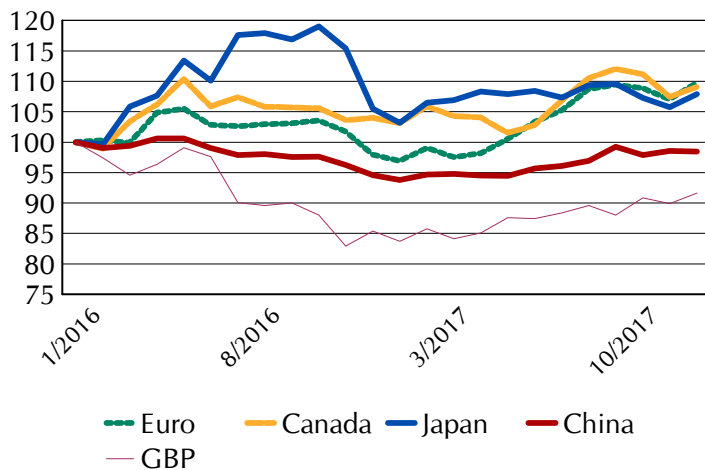
Foreign arrivals increased 4.3 percent from 2016 to 2017p. The dollar continues to remain strong against selected foreign currencies. This can apply downward pressure on international spending by lessening the purchasing power of the international visitor that has traveled to the U.S.

Overseas arrivals to the U.S.



Relative Value of Selected Foreign Currencies compared to U.S. Dollar

Monthly Averages, Jan 2016 through December 2017



Sources:

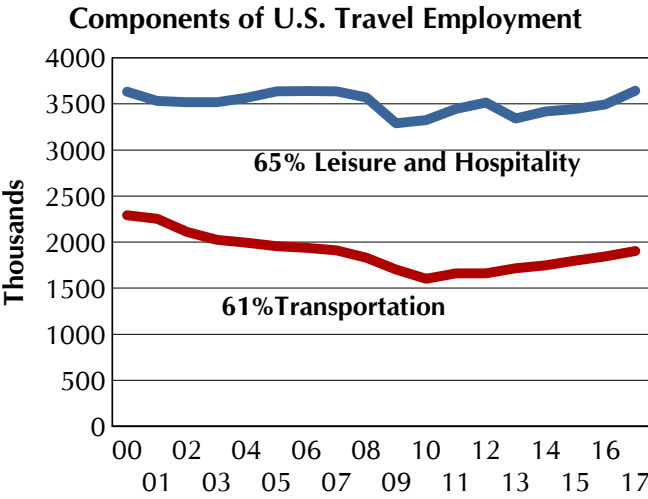
Overseas Arrivals: 2017 has been estimated using Tourism Economics annual change for overseas visitors from 2017 to 2016. The original source data is under review by the NTTO. National Travel and Tourism Office, U.S. Department of Commerce. Tourism Economics. *NTTO press release. <https://bit.ly/2JTgmH1>

Relative Value of Selected Foreign Currencies: USForex, Inc. (www.usforex.com)

The following two graphs show employment trends since 2000 and the composition of travel industry employment since the recession. The first graph shows that travel-generated employment recovered from the 2008-09 recession by 2017. There has been no significant employment growth in the industry beyond the recession recovery. Leisure and hospitality employment was 3.5 million in 2000 or 65 percent of total travel industry employment, compared to 3.6 million in 2000 or 61 percent of the total. Most of this growth was due to food services employment. However, employment in transportation and other industries declined over the same period from 2.3 million to 1.8 million, mostly due to decreased employment in the airline and related transportation industries.

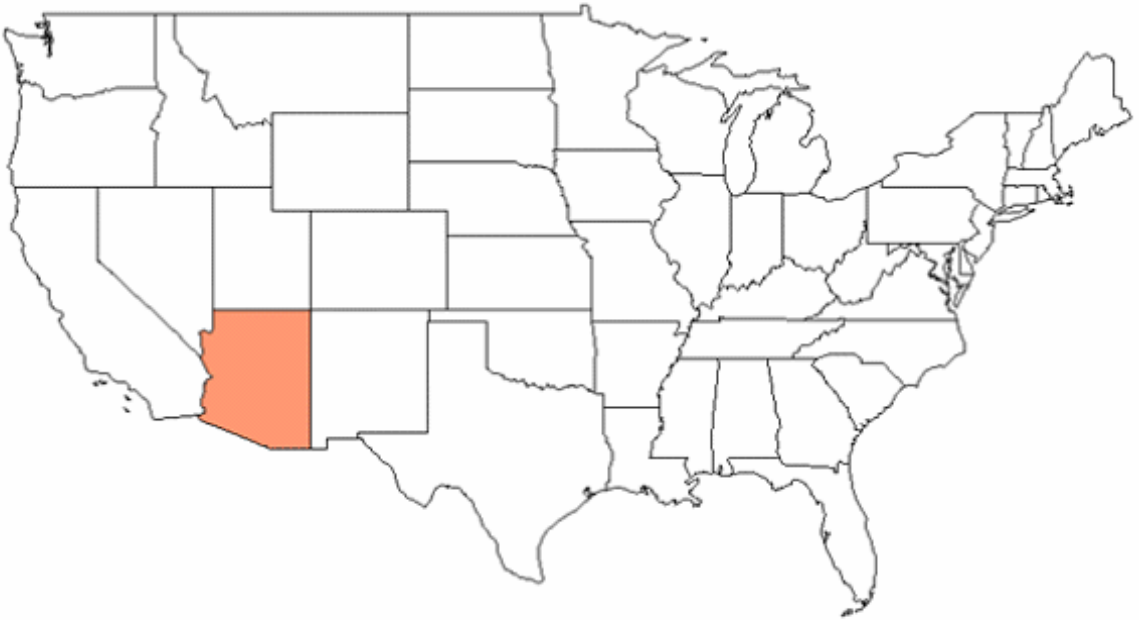


Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts.



Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts. Leisure & hospitality includes accommodations, food services, and arts, entertainment & recreation. Transportation and other includes retail and all other industries.

II. ARIZONA TRAVEL



The multi-billion dollar travel industry in Arizona is an important part of the state and local economies. The industry is represented primarily by businesses in the leisure and hospitality sector, transportation, and retail. The money that visitors spend on various goods and services while in Arizona produces business receipts at these firms, which in turn generate earnings and employment for Arizona residents. In addition, state and local governments collect taxes that are generated from visitor spending. Most of these taxes are imposed on the sale of goods and services to visitors, thus avoiding a tax burden on local residents.

The economic impacts directly generated by visitor spending also contribute to significant secondary impacts. A portion of the business receipts generated by visitor spending is spent by businesses within Arizona for other goods and services (indirect impacts). Visitor generated earnings are also spent by employees for goods and services produced in Arizona (induced impacts).

Summary of Arizona Travel

- Total direct travel spending in Arizona was \$22.7 billion in 2017p. The increase of 6.7 percent was due to the increase in motor fuel prices, and strong growth in commercial lodging spending. Non-transportation visitor spending increased by 6.3 percent, following a 3.3 percent increase from 2015 to 2016. Travel spending in real (inflation-adjusted) dollars has increased by 5.0 percent in 2017p.
- Lodging sales increased by 9.3 percent in 2017 following a 5.1 percent increase the preceding year. The strong growth in room sales over that past two years has been equally attributable to increased room rates and room demand (STR, Inc.).
- Visitor air travel on domestic flights to Arizona destinations increased by 5.8 percent in 2017p, following a 7 percent increase the preceding year. Visitor air arrivals to the state have increased an average of 6 percent per year since 2014.
- Direct travel-generated employment was 187,100 in 2017p. This represents an addition of 2,900 jobs, an increase of 1.6 percent. (See detailed employment estimates, page 17.)
- The Gross Domestic Product of the travel industry was \$9.8 billion in 2017p. The travel industry and the microelectronics industry have been the top two export-oriented industries in the state in recent years.
- The re-spending of travel-related revenues by businesses and employees creates secondary impacts. In 2017p, the secondary impacts were 160,800 jobs with \$7.3 billion in earnings.

Travel Trends

The Arizona travel industry experienced strong growth in 2017. Travel spending increased by 6.7 percent from 2016 to 2017p, following a 1.9 percent increase the preceding year, the rebound in motor fuel prices helped lift travel spending. Non-transportation visitor spending increased by 6.3 percent in 2017p, compared to a 3.3 percent increase the preceding year[1]. Earnings, employment and tax revenue have also experienced substantial growth over the past two years.

Direct Travel Impacts, 2000-2017p

	2000	2005	2010	2016	2017	Ave. Annual %Chg. 16-17p	00-17p
Spending (\$Billions)							
Total (Current \$)	13.7	16.9	17.8	21.2	22.7	6.7%	3.0%
Other	1.7	1.9	2.0	2.6	2.8	5.1%	3.1%
Visitor	12.1	15.0	15.7	18.6	19.9	7.0%	3.0%
Non-transportation	9.4	11.1	11.1	13.8	14.7	6.3%	2.7%
Transportation	2.7	3.9	4.6	4.8	5.2	9.0%	4.0%
Earnings (\$Billions)							
Earnings (Current \$)	3.9	4.6	5.0	6.5	6.9	6.6%	3.4%
Employment (Thousands)							
Employment	160.7	165.9	155.9	184.2	187.1	1.6%	0.9%
Tax Revenue (\$Millions)							
Total (Current \$)	1,937	2,332	2,516	3,093	3,370	9.0%	3.3%
Local	549	652	698	893	1,014	13.6%	3.7%
State	534	694	738	859	932	8.6%	3.3%
Federal	854	987	1,079	1,341	1,423	6.1%	3.0%

Other spending includes resident air travel, travel arrangement and reservation services, and convention and trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

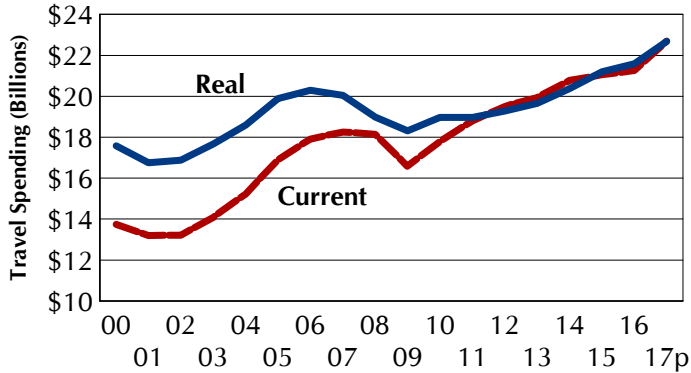
Local tax revenue includes lodging taxes, sales taxes, auto rental taxes and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

State tax revenue includes lodging, sales and motor fuel tax payments of visitors, and the income tax and sales tax payments attributable to the travel industry income of businesses and employees.

Federal tax revenue includes motor fuel excise taxes and airline ticket taxes paid by visitors, and the payroll and income taxes attributable to the travel industry income of employees and businesses.

[1]. Statewide travel trends for 2000 through 2017p are shown on pages 37 through 41 of the county section.

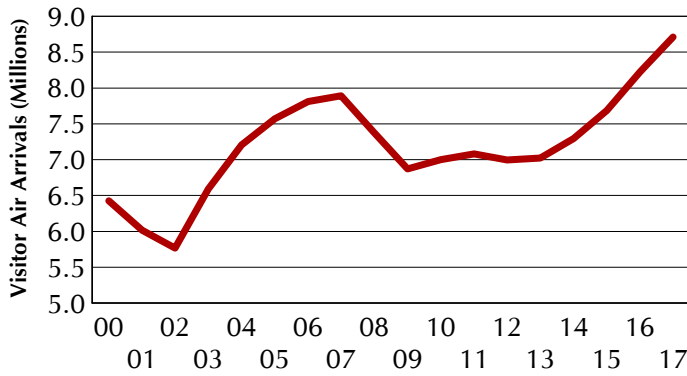
Arizona Direct Spending Real and Current Dollars



In real dollars (adjusted for inflation) Arizona travel spending increased by 5.0 percent over 2016. In current dollars, the increase was 6.7 percent.

Sources: STR, Inc., Energy Information Administration, U.S. Department of Transportation Origin and Destination Survey, and Bureau of Labor Statistics CPI-West Urban.

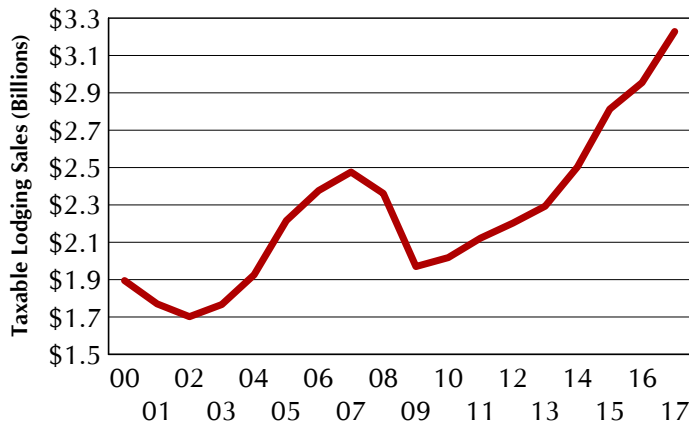
Air Passenger Visitor Arrivals to Arizona U.S. Air Carriers



Visitor air arrivals to Arizona increased by 5.8 percent from 2016 to 2017, following a 7 percent increase the preceding year. From 2009 through 2013, visitor air arrivals were essentially flat.

Sources: U.S. Department of Transportation Origin and Destination Survey and Dean Runyan Associates.

Arizona Taxable Lodging Sales



Lodging sales is another indicator of the strength of the travel industry as it reflects the profitability of one of its key sectors. Taxable lodging sales increased by 9.3 percent annually from 2016 to 2017 following a 5.1 percent increase the preceding year.

Sources: Arizona Department of Revenue and STR, Inc.

Seasonal and Regional Travel Impacts

Lodging sales are used in this section to document seasonal patterns in the Arizona tourism industry. (Lodging sales are used because travel spending and related impacts are estimated only on a calendar year basis.)

The pie chart shows the annual distribution of lodging sales by region. The lodging sales of the Phoenix and Central Arizona region are greater than the four other regions combined.

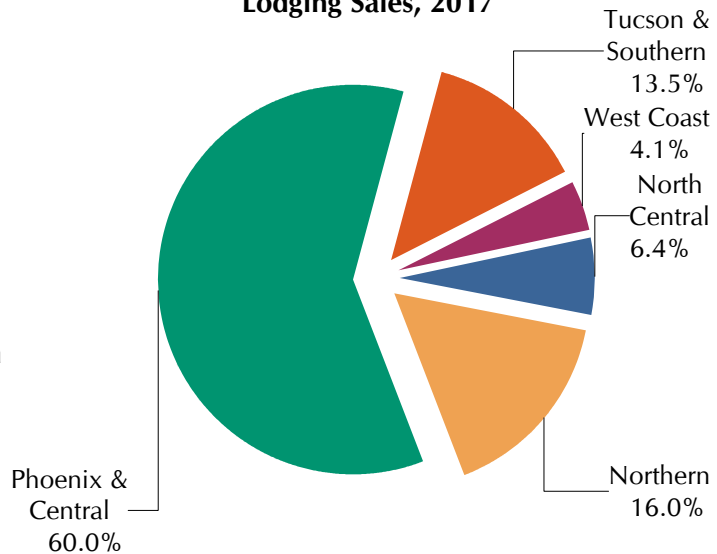
The Northern Arizona region includes Apache, Coconino and Navajo counties. The West Coast region includes La Paz, Mohave and Yuma counties. The North Central region includes Gila and Yavapai counties. The Phoenix and Central Arizona region includes Maricopa and Pinal counties. The Tucson and Southern Arizona region includes Cochise, Graham, Greenlee, Pima and Santa Cruz counties.

The next two graphs provide quarterly breakouts for the regions and the state.

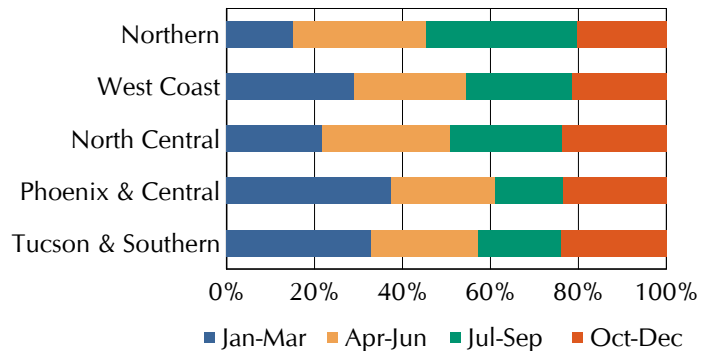
Lodging sales are greatest in the first quarter for three of Arizona's tourism regions - the West Coast, Phoenix and Tucson. By contrast, spring and summer quarters are most important for the Northern and North Central regions.

The bottom column chart provides a statewide quarterly breakout of lodging sales in two year increments beginning in 2008. Lodging sales have increased in all four quarters since the prior 2007 peak.

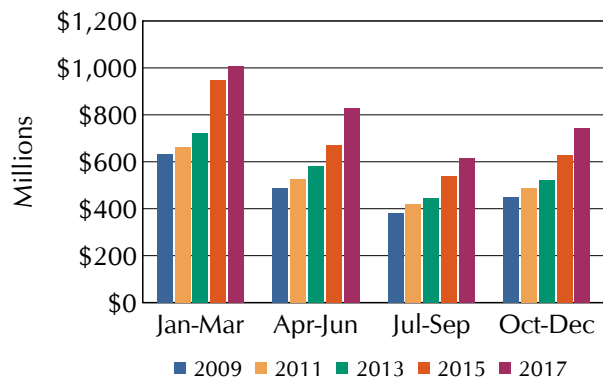
Regional Shares of Arizona Taxable Lodging Sales, 2017



Taxable Lodging Sales by Region and Quarter, 2017



Arizona Taxable Lodging Sales by Quarter



Source: Arizona Department of Revenue taxable hotel/motel sales.

Visitor Origin

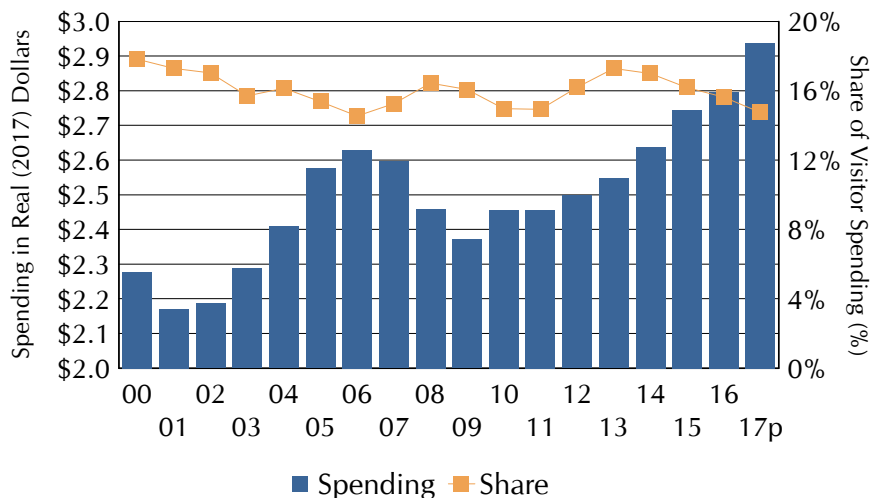
Out-of-state travelers generate more than three-fourths of the visitor impacts in Arizona. Visitors from other states are the largest segment (more than 68 percent of spending), while international travel, including day travel from Mexico, comprises approximately 15 percent of visitor impacts. The share has declined slightly in the past three years due to the decreased value of foreign currencies relative to the U.S. dollar. (See bottom graph and pages 2 and 3 of the U.S. travel section.)

Arizona Travel Impacts by Origin of Visitor, 2017p

Origin	Spending (\$Billions)	Earnings (\$Billions)	Employment (Thousands)	Tax Receipts (\$Millions)	
				Local/State	Federal
All Visitors	19.9	5.8	171.2	1,922	1,250
Arizona	4.4	1.1	34.5	404	225
Other U.S.	12.6	4.0	112.5	1,230	891
International	2.9	0.8	24.2	288	134
Other Travel	2.8	1.1	15.9	25	173
Total Travel	22.7	6.9	187.1	1,947	1,423

Sources: Dean Runyan Associates, International Trade Administration and Bureau of Economic Analysis (U.S. Dept. of Commerce), TNS TravelsAmerica visitor survey, Statistics Canada, Vera Pavlakovich-Kochi and Alberta H. Charney, "Mexican Visitors to Arizona: Visitor Characteristics and Economic Impacts, 2007-08" (Karl Eller College of Business and Public Administration, University of Arizona) and Bureau of Transportation Statistics Border Crossing/Entry Data.

International Visitor Spending in Arizona

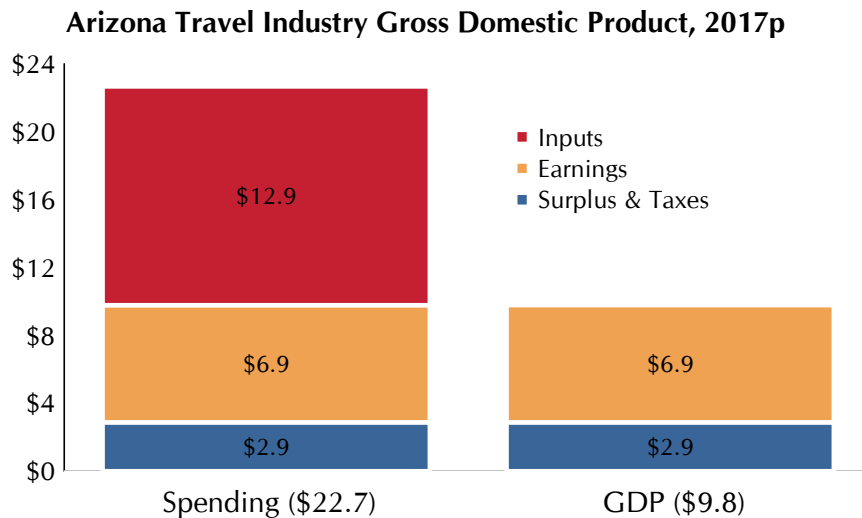


Sources: See above chart for source of international estimates. See first graph on preceding page for constant dollar estimates. Constant dollar visitor spending does not include "Other Travel."

Arizona Travel Industry Gross Domestic Product

In concept, the Gross Domestic Product (GDP) of a particular industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always smaller than output or sales because GDP measures only the “value added” of an industry and does not include the cost of the inputs that are also necessary to produce a good or service. Alternatively, GDP can be thought of as the sum of earnings, indirect business taxes (primarily excise and property taxes) and other operating surplus (including profits). Estimates of travel spending and travel industry GDP are shown in the chart below. Arizona travel industry GDP amounted to \$9.8 billion in 2017p. Arizona travel industry GDP represents about 3.0 percent of total state GDP in recent years.

About 60 percent of all travel spending in Arizona is attributed to intermediate inputs and goods resold at retail. Intermediate inputs cover a range of goods and services that are purchased by travel industry businesses for the purpose of creating a product or service for the traveler. For example, lodging establishments purchase cable television services. Restaurants purchase food and beverages from vendors. In both cases, these inputs are classified as the GDP of other industries. In addition, travel spending occurs at many retail establishments where the goods purchased from the retailer are purchased as finished goods from suppliers. These resold goods are also counted as products of other industries. This would include motor fuel, groceries and most of the commodities sold at retail establishments[2].



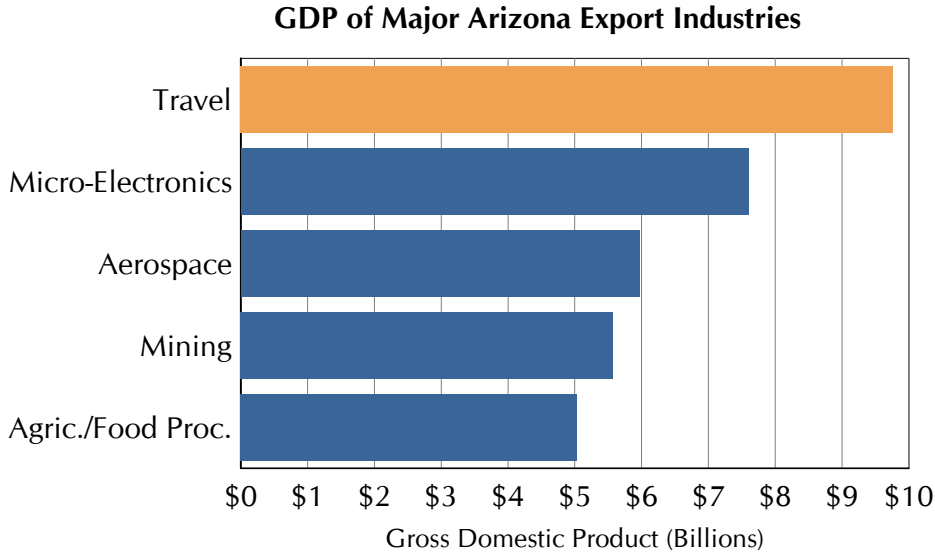
Sources: Dean Runyan Associates, Bureau of Economic Analysis, and Implan Group, LLC. Details may not add to totals due to rounding.

[2]. About 40 percent of the \$12.9 billion of inputs and goods resold are purchased from other Arizona businesses.

Gross Domestic Product of Arizona Export-Oriented Industries

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations. Agriculture, mining, and manufacturing are the best examples of export-oriented industries. Clearly, there are cases in each of these three sectors where the products are sold within the local or regional market. Nonetheless, in general most businesses within these industries depend on export markets. The travel industry is also an export-oriented industry because goods and services are sold to *visitors*, rather than residents. The travel industry injects money into the local economy, as do the exports of other industries.

Exports are not necessarily more important than locally traded goods and services. However, diverse export-oriented industries in any economy are a source of strength - in part because they generate income that contributes to the development of other local services and amenities. Such industries characterize the “comparative advantage” of the local economy within larger regional, national and global markets. A comparison of the GDP’s of the leading export-oriented industries in Arizona is shown below.



Source: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. 2017 estimates for non-travel industries based on 2016 GDP and 2017 three quarters of earnings and payroll.

Direct, Secondary and Total Impacts

Travel spending within Arizona brings money into many Arizona communities in the form of business receipts. Portions of these receipts are spent within the state for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. This re-spending of travel-related revenues creates *indirect and induced impacts*. To summarize:

- **Direct** impacts represent the employment and earnings attributable to travel expenditures made directly by travelers at businesses throughout the state.
- **Indirect** impacts represent the employment and earnings associated with industries that supply goods and services to the direct businesses (i.e., those that receive money directly from travelers throughout the state).
- **Induced** impacts represent the employment and earnings that result from purchases for food, housing, transportation, recreation, and other goods and services made by travel industry employees, and the employees of the indirectly affected industries.

The impacts in this section are presented in terms of the employment and earnings of eleven major industry groups. These industry groups are similar, but not identical to the business service (or commodity) categories presented elsewhere in this report. (The specific industries that comprise these major groups are listed in Appendix D.) Direct travel impacts, such as those discussed in the first part of this section and the regional and county impacts presented elsewhere in this report are found in the following industry groups:

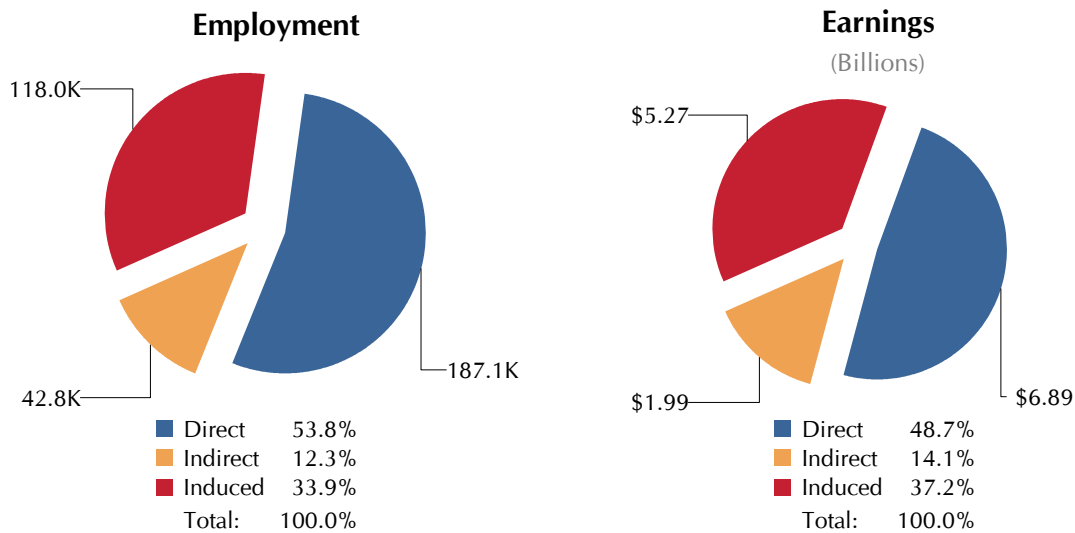
- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Trade**
- **Transportation**

As is indicated in the following tables and graphs, the total direct employment and earnings of these four industry groups is identical to the total direct employment and earnings shown in the first part of this section. The only difference is that these industry groups represent industry groupings (firms) rather than commodity or business service groupings.

The indirect and induced impacts of travel spending are found in all thirteen industry groupings shown in the following tables and graphs. To summarize the primary secondary impacts:

- **Professional & Business Services** (34,600 jobs and \$2.3 billion earnings). A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses (indirect effect). Employees of these firms also purchase professional services (induced effect).
- **Other Services** (14,300 jobs and \$493 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops. Similarly, travel businesses utilize a number of service providers, such as laundry, maintenance and business services.
- **Government** (25,900 jobs and \$1.6 billion earnings). Employees of travel-related businesses pay fees to attend public educational institutions and to operate motor vehicles.
- **Finance, Insurance and Real Estate** (12,000 jobs and \$640 million earnings). Employees and businesses use the services of financial institutions, insurers and real estate businesses.

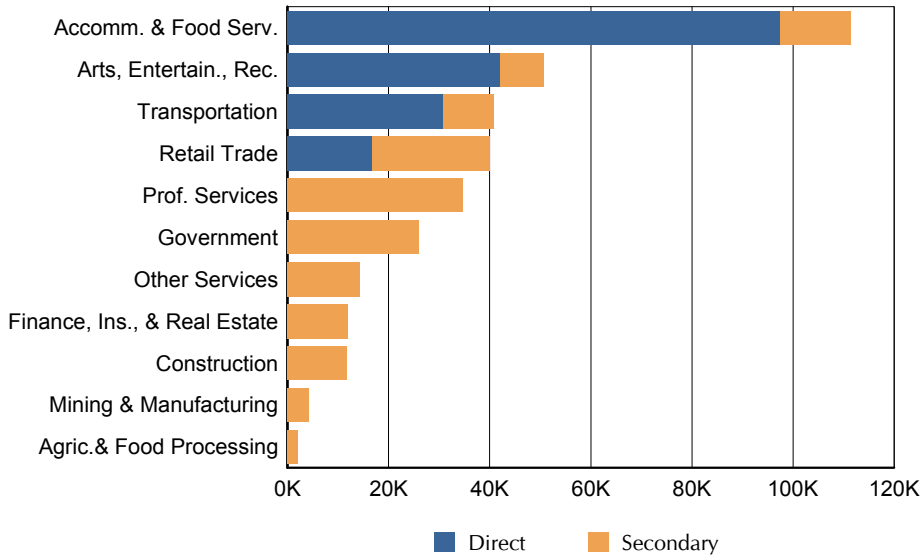
Total Employment and Earnings Generated by Travel Spending in Arizona, 2017p



Sources: Dean Runyan Associates with IMPLAN GROUP, LLC. Total employment was 347,800 jobs. The employment multiplier for 2017 is 1.86 (347.85/187.06). Total earnings were \$14.15 Billion. The earnings multiplier is 2.05 (14.15/6.89).

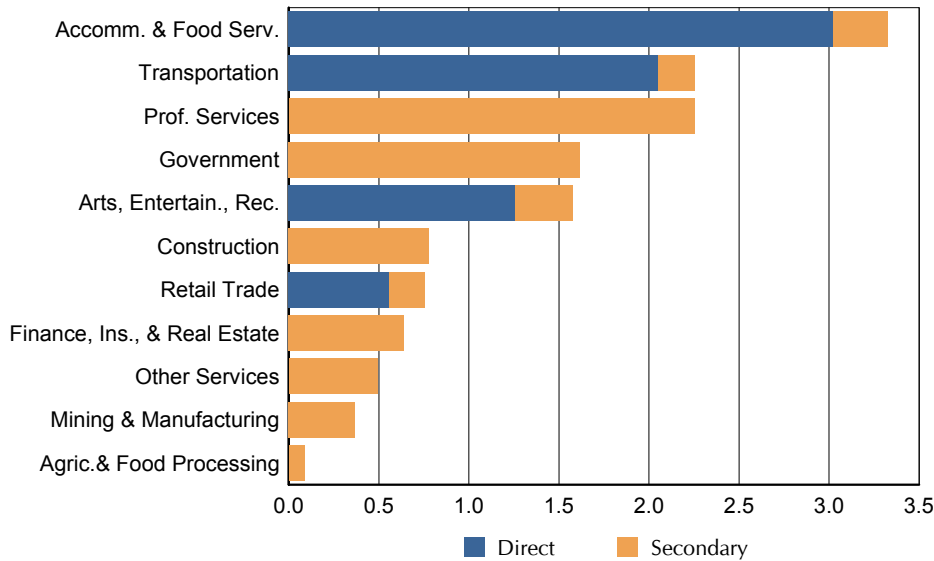
Direct and Secondary Employment

Generated by Travel Spending in Arizona



Direct and Secondary Earnings

Generated by Travel Spending in Arizona



Detailed estimates are reported in the following table. It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire state of Arizona and do not necessarily reflect economic patterns for individual counties, regions or sub-regions within the state. While total economic impacts can be calculated on a county or regional level, such a detailed analysis is not included in this study. In general, geographic areas with lower levels of aggregate economic activity will have smaller secondary impacts within those same geographic boundaries.

Direct and Secondary Travel-Generated Earnings in Arizona, 2017p
(\$Million)

Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accomm. & Food Serv.	3,022	93	210	303	3,326
Arts, Entertain., Rec.	1,258	251	71	321	1,580
Retail Trade	558	16	179	195	753
Transportation	2,051	157	47	204	2,255
Agric.& Food Processing		41	45	86	86
Construction		62	718	780	780
Finance, Ins., & Real Estate		224	417	641	641
Government		108	1,507	1,615	1,615
Mining & Manufacturing		139	228	367	367
Other Services		238	256	494	494
Prof. Services		664	1,589	2,253	2,253
All Industries	6,889	1,992	5,267	7,260	14,149

Direct and Secondary Travel-Generated Employment in Arizona, 2017p
(thousand jobs)

Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accomm. & Food Serv.	97.5	4.3	9.7	14.0	111.5
Arts, Entertain., Rec.	42.2	6.1	2.5	8.6	50.8
Retail Trade	16.7	3.3	19.9	23.2	39.9
Transportation	30.7	5.6	4.5	10.1	40.8
Agric.& Food Processing		1.0	1.1	2.1	2.1
All Other					
Construction		0.9	10.9	11.8	11.8
Finance, Ins., & Real Estate		4.4	7.6	12.0	12.0
Government		1.2	24.7	25.9	25.9
Mining & Manufacturing		1.6	2.6	4.2	4.2
Other Services		5.7	8.6	14.3	14.3
Prof. Services		8.7	25.9	34.6	34.6
All Industries	187.1	42.8	118.0	160.8	347.9

Source: Dean Runyan Associates and Minnesota Implan Group.

Note: These industry groups are not equivalent to the categories used in the direct impact tables used in this report. See Appendix G. Details may not add to totals due to rounding.

Detailed direct travel impacts for 2008 through 2017 follow:

Arizona Direct Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Billion)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	16.0	15.7	16.7	17.1	17.5	18.2	18.5	18.6	19.9
Other Travel*	2.2	2.0	2.1	2.4	2.5	2.6	2.6	2.6	2.8
Total	18.1	17.8	18.8	19.5	19.9	20.8	21.0	21.2	22.7
Visitor Spending by Type of Traveler Accommodation (\$Billion)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	7.3	7.0	7.4	7.7	7.9	8.4	8.9	9.2	9.9
Private Home	3.8	3.9	4.2	4.2	4.3	4.4	4.4	4.4	4.6
Campground	0.7	0.6	0.7	0.7	0.7	0.7	0.7	0.6	0.7
Vacation Home	0.6	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.8
Day Travel	3.5	3.5	3.6	3.8	3.8	3.9	3.7	3.6	3.9
Total	16.0	15.7	16.7	17.1	17.5	18.2	18.5	18.6	19.9
Visitor Spending by Commodity Purchased (\$Billion)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	2.7	2.4	2.5	2.6	2.7	3.0	3.3	3.5	3.8
Food Service	3.2	3.4	3.5	3.6	3.7	3.9	4.2	4.4	4.7
Food Stores	0.9	0.9	0.9	0.9	0.9	1.0	1.0	1.0	1.0
Local Tran. & Gas	3.2	3.1	3.6	3.8	3.7	3.8	3.2	2.9	3.2
Arts, Ent. & Rec.	2.0	2.1	2.1	2.1	2.2	2.2	2.3	2.4	2.5
Retail Sales	2.4	2.4	2.4	2.5	2.5	2.6	2.6	2.6	2.7
Visitor Air Tran.	1.5	1.5	1.6	1.6	1.6	1.8	1.9	1.9	2.0
Total	16.0	15.7	16.7	17.1	17.5	18.2	18.5	18.6	19.9
Industry Earnings Generated by Travel Spending (\$Billion)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	2.1	2.1	2.1	2.2	2.3	2.5	2.7	2.8	3.0
Arts, Ent. & Rec.	0.9	0.9	0.9	1.0	1.0	1.1	1.1	1.2	1.3
Retail**	0.6	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.7	0.7
Other Travel*	0.8	0.8	0.8	0.9	1.0	1.0	1.0	1.0	1.1
Total	5.1	5.0	5.2	5.4	5.5	5.8	6.2	6.5	6.9
Industry Employment Generated by Travel Spending (Thousand Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	83.4	80.1	82.1	83.2	86.1	88.7	92.2	95.1	97.5
Arts, Ent. & Rec.	37.4	35.6	35.6	36.6	37.3	39.7	41.3	41.9	42.2
Retail**	20.0	16.8	16.8	16.6	16.9	17.6	18.1	18.4	18.7
Ground Tran.	3.5	3.5	3.6	3.7	3.8	3.9	4.1	4.4	4.6
Visitor Air Tran.	7.9	7.1	7.4	7.5	7.2	7.6	8.1	8.2	8.2
Other Travel*	14.4	12.8	13.2	14.9	14.3	15.3	15.7	16.1	15.9
Total	166.6	155.9	158.7	162.5	165.6	172.7	179.5	184.2	187.1
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	706	698	727	735	756	787	856	893	1,014
State Tax Receipts	708	738	801	825	805	796	839	859	932
Federal Tax Receipts	1,083	1,079	1,028	1,057	1,172	1,230	1,304	1,341	1,423
Total	2,497	2,516	2,556	2,617	2,733	2,814	2,999	3,093	3,370

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangements & reservation services, and convention & trade organizers.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rentals.

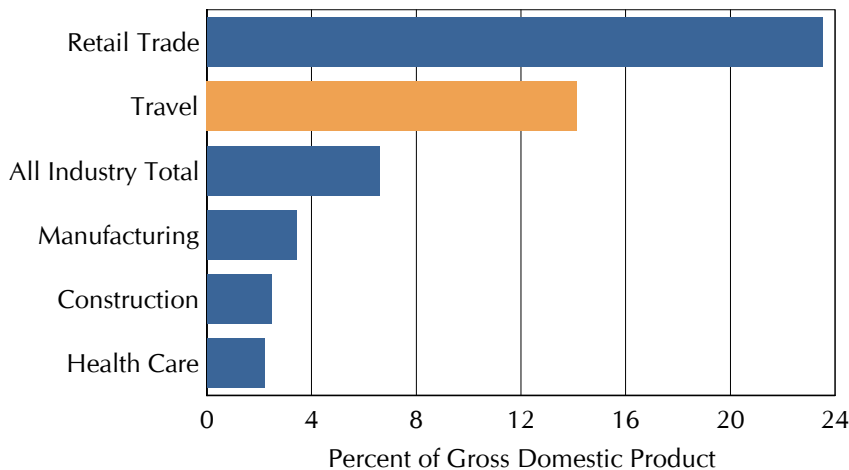
III. STATE AND LOCAL GOVERNMENT REVENUE

This section is concerned with the contribution of the Arizona travel industry to state and local government finance. The first part of the report compares the travel industry to various other sectors of the state economy. The remainder provides an overview of state and local finance and the revenue contribution of the travel industry.

Industry Gross Domestic Product and Taxes

One way to consider the tax contributions of various sectors of the economy is to express the tax payments of businesses to government as a percentage of Gross Domestic Product. The bar chart and accompanying table show these tax payments (taxes on production and imports or TOPI) for a sample of goods-producing and service sectors in the state, including travel. TOPI include most of the taxes paid by the business firm to local, state and federal governments except for income taxes. This includes property taxes, licenses and fees and the sales and excise taxes collected from consumers. It is because of these later taxes that retail trade and travel have relatively high proportions of tax payments in relation to their gross domestic products.

Production & Import Taxes as a Percent of GDP
Selected Arizona Industry Sectors, 2017p Calendar Year



Sources: Bureau of Economic Analysis and Dean Runyan Associates.

*TOPI denotes taxes on production and imports less subsidies.

GDP & TOPI expressed in \$Million.

	GDP	*TOPI	Percent
Construction	14,766	364	2.5%
Health Care	27,098	594	2.2%
Manufacturing	26,313	901	3.4%
Retail Trade	24,759	5,822	23.5%
Travel	9,783	1,383	14.1%
All Industries	319,850	21,084	6.6%

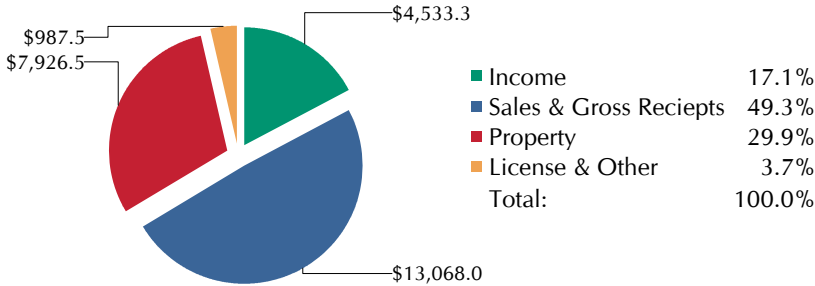
The remainder of this report will focus on the travel industry and the specific tax contributions made to state and local government in Arizona. In addition to the taxes on production discussed in the previous section, the tax payments of travel industry employees derived from the income earned from travel industry businesses will be included.[1] The three primary sources of tax revenue generated by the travel industry are:

- Sales tax receipts generated by **visitor spending**. This includes local and state sales taxes, lodging taxes, alcoholic beverage taxes, motor vehicle rental taxes and motor fuel taxes.
- Taxes paid by **travel industry businesses** attributable to travel generated business receipts (property and income taxes).
- Taxes paid by **travel industry employees** attributable to travel generated earnings (sales and property taxes).

Arizona Tax Structure

The pie chart below, adapted from the Bureau of the Census’ State and Local Government Finance and other data sources, shows the main categories of tax revenue in Arizona. Approximately one-half of all tax revenue is derived from sales and gross receipts taxes. Property taxes, paid primarily by homeowners and businesses to local governments, constitute more than one-fourth of all tax revenue.

Arizona State and Local Government Tax Revenues
2016-2017 Fiscal Year (\$Millions)



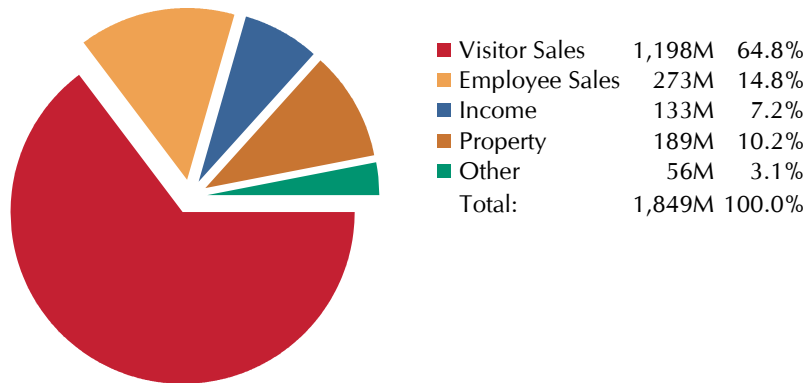
Sources: The 2016-17 fiscal year estimates of state and local tax revenues in Arizona were prepared by Dean Runyan Associates from various sources, including the Bureau of the Census (State and Local Government Finance), the Arizona Department of Revenue, the Bureau of Economic Analysis and a selection of annual financial reports for cities and counties. Sales and gross receipts taxes include the state privilege tax, local sales taxes and a variety of selective taxes, such as those on motor fuel and lodging.

[1]In effect, this means re-allocating some of the sales and excise payments made by other industries to the travel industry because the payments are ultimately made by consumers that earned their income in the travel industry.
 [2]Businesses pay 68 percent of all property taxes in Arizona according to the Tax Foundation (Fiscal Fact No. 342, November 21, 2012).

Travel Industry Tax Revenue

The distribution of taxes generated by the travel industry for the 2016-17 fiscal year (July 1 thru June 30) is shown in the following pie chart. The categories are the same as the preceding figure, with the exception that sales tax receipts are also distinguished between those that are generated by visitor spending and those that are generated by the spending of travel industry employees.

Arizona Travel Industry State and Local Government Tax Revenues
2016-2017 Fiscal Year (\$Million)



Source: Dean Runyan Associates. "Other" travel generated tax revenue includes gaming taxes and passenger facility charges for visitors who travel to Arizona Airports. It will not add to calendar year figures in the economic impact tables.

Whereas slightly about one-half of all state and local tax revenue in Arizona was attributable to sales tax collections in the 2016-17 fiscal year, 80 percent of all travel industry tax revenue was attributable to sales tax receipts from visitors (65 percent) and the purchases of employees in the travel industry (15 percent).

Travel industry state and local tax revenues are compared to total Arizona state and local tax revenues in the following table. Because the travel industry generates a relatively high proportion of sales tax revenues, it is associated with proportionately more tax revenues than would be expected given the size of the industry, as measured by earnings or gross domestic product. Whereas the earnings and GDP of the travel industry are in the range of two and one-half percent of the state totals, travel industry tax revenues represent 7.0 percent of all state and local tax revenues in Arizona (see table, following page). This is consistent with the initial analysis that compared different industries within the state.

Arizona State and Local Tax Revenues

2016-2017 Fiscal Year (\$Million)

(July 1 thru June 30)

Type	Total	Travel Generated	Percent Travel
Sales & Gross Receipts	\$13,068	\$1,471	11.3%
Property	\$7,926	\$189	2.4%
Income	\$4,533	\$133	2.9%
License & Other	\$987	\$56	5.7%
Total Tax Receipts	\$26,515	\$1,849	7.0%

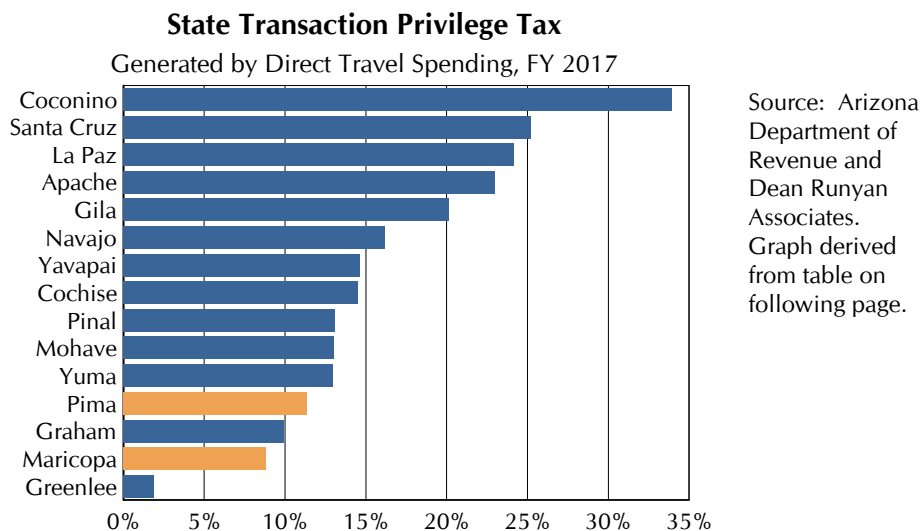
Source: Dean Runyan Associates and Bureau of the Census, State and Local Government Finance.

Summary

This analysis of the tax revenue generated by the Arizona travel industry can be summarized as follows:

- The Arizona travel industry contributes more tax revenue to state and local governments than would be expected based on the size of the industry. Whereas the gross domestic product and employee earnings represent about three percent of the state economy, the travel industry generated 7.0 percent of tax revenue in the 2017 fiscal year (July 1 thru June 30).
- Eighty percent of all travel-generated tax revenue is attributable to sales and gross receipts taxes.
- A majority of these tax revenues are borne by visitors who reside in other states and countries.

The tax impacts of the travel industry are generally greater for the less urbanized counties in the state, as illustrated in the graph below.



The revenue contributions of Arizona's fifteen counties are detailed in the follow two tables.

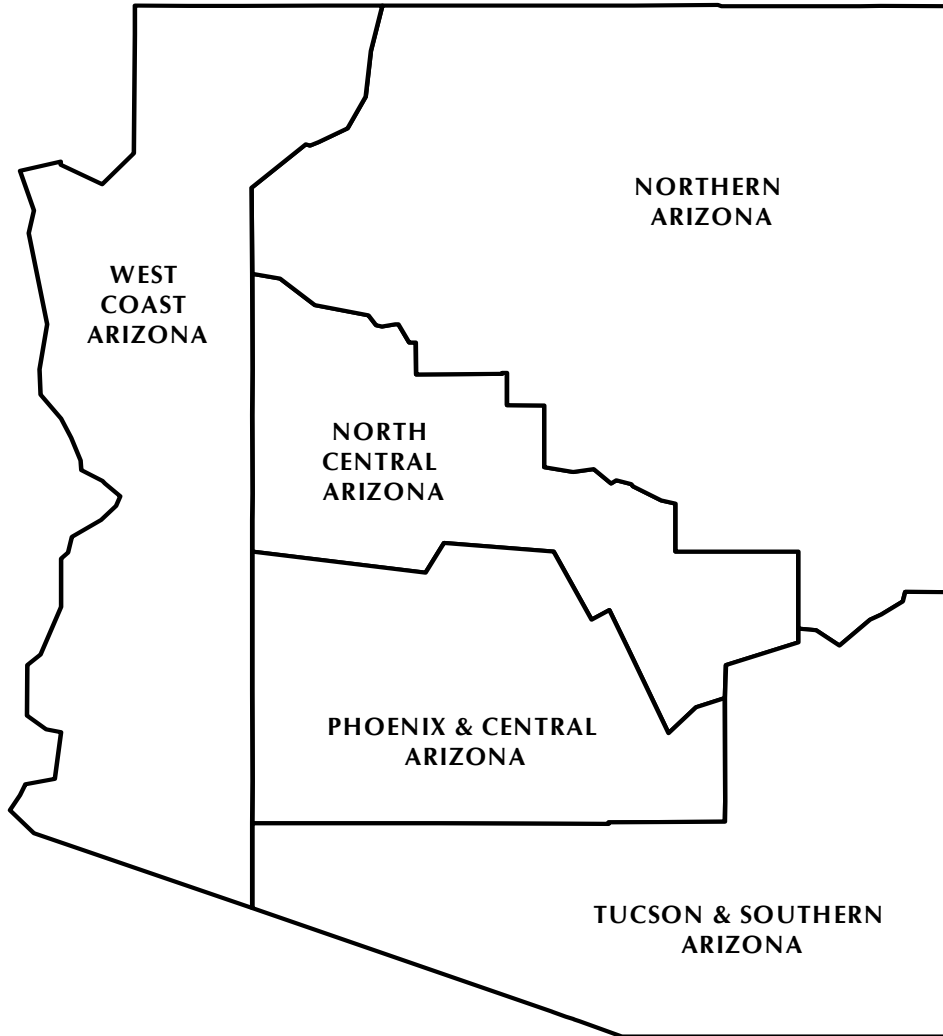
**State Transaction Privilege Taxes Generated
by Direct Travel Spending, FY 2017 (July 1 thru June 30)**
(\$Millions)

	Total	Travel	Percent
Apache	14.9	3.4	23.0%
Cochise	69.5	10.1	14.5%
Coconino	155.9	52.9	34.0%
Gila	31.9	6.4	20.2%
Graham	20.7	2.1	9.9%
Greenlee	23.0	0.4	1.9%
La Paz	13.5	3.3	24.2%
Maricopa	4,006.0	351.9	8.8%
Mohave	133.6	17.4	13.0%
Navajo	66.9	10.8	16.2%
Pima	749.1	85.1	11.4%
Pinal	156.1	20.4	13.1%
Santa Cruz	26.7	6.7	25.2%
Yavapai	173.5	25.4	14.6%
Yuma	128.9	16.7	13.0%
Arizona	5,770.3	613.1	10.6%

State and Local Travel-Generated Tax Revenue per Household
2017p Calendar Year

	Tax Revenue (\$Millions)			Households (Thousands)	Tax Revenue per Household
	Local	State	Total		
Apache	\$3.9	\$5.9	\$9.8	22.7	\$430
Cochise	\$13.5	\$14.9	\$28.4	48.1	\$590
Coconino	\$72.5	\$62.3	\$134.8	48.8	\$2,760
Gila	\$9.5	\$13.4	\$22.9	22.0	\$1,040
Graham	\$2.7	\$3.0	\$5.7	11.2	\$510
Greenlee	\$0.3	\$0.7	\$0.9	3.6	\$250
La Paz	\$5.3	\$6.4	\$11.7	9.3	\$1,260
Maricopa	\$698.6	\$546.3	\$1,245.0	1,589.2	\$780
Mohave	\$23.3	\$27.8	\$51.1	85.3	\$600
Navajo	\$14.0	\$16.0	\$30.0	36.1	\$830
Pima	\$74.1	\$126.7	\$200.8	404.8	\$500
Pinal	\$25.3	\$33.3	\$58.5	142.4	\$410
Santa Cruz	\$7.9	\$9.7	\$17.6	15.0	\$1,170
Yavapai	\$40.9	\$38.0	\$78.9	98.2	\$800
Yuma	\$22.6	\$28.2	\$50.8	68.2	\$740
Arizona	\$1,014.5	\$932.5	\$1,946.9	2,605.2	\$750

IV: REGIONAL TRAVEL IMPACTS 2008-2017p



*The **Northern Arizona** region includes Apache, Coconino and Navajo counties. **West Coast Arizona** includes La Paz, Mohave and Yuma counties. **North Central Arizona** includes Gila and Yavapai counties. **Phoenix and Central Arizona** includes Maricopa and Pinal counties. **Tucson and Southern Arizona** includes Cochise, Graham, Greenlee, Pima and Santa Cruz counties.*

Arizona Regional Travel Impacts, 2017p
(*\$Million*)

	Travel Spending				Tax Revenue		
	Total	Visitor*	Earn	Employ.	Local	State	Total
Northern Arizona	\$1,896	\$1,815	\$547	18,950	\$90	\$84	\$175
West Coast Arizona	\$1,365	\$1,272	\$383	14,790	\$51	\$62	\$114
North Central Arizona	\$1,137	\$1,085	\$322	12,340	\$50	\$51	\$102
Phoenix & Central Arizona	\$14,727	\$11,580	\$4,727	108,760	\$724	\$580	\$1,303
Tucson & Southern Arizona	\$3,552	\$2,957	\$911	32,220	\$98	\$155	\$253
Arizona	\$22,677	\$18,708	\$6,889	187,060	\$1,014	\$932	\$1,947

Details may not add to totals due to rounding.

*The sum of regional visitor spending is less than statewide visitor spending because a portion of ground transportation is allocated to "other travel" at the regional level.

Travel Generated Employment & Earnings, 2017p

	Employment (Thousand)			Earnings (\$Million)		
	Total	Travel	Percent Travel	Total	Travel	Percent Travel
Northern Arizona	156.9	19.0	12.1%	\$6,690	\$547	7.8%
West Coast Arizona	167.2	14.8	8.8%	\$7,843	\$383	4.6%
North Central Arizona	122.1	12.3	10.1%	\$4,538	\$322	6.7%
Phoenix & Central Arizona	2,679.0	108.8	4.1%	\$142,182	\$4,727	3.2%
Tucson & Southern Arizona	607.4	32.2	5.3%	\$28,934	\$911	3.0%
Arizona	3,732.6	187.1	5.0%	\$190,186	\$6,889	3.4%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis. Total and travel generated employment estimates by Dean Runyan Associates. Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

Arizona Regional Direct Travel Spending, 2008-2017p
(\$Millions)

Northern Arizona											
	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	1,386	1,339	1,411	1,483	1,510	1,598	1,653	1,733	1,896	9.4%	3.5%
Visitor Spending	1,307	1,266	1,325	1,383	1,408	1,497	1,567	1,658	1,815	9.4%	3.7%
Non-transportation	1,132	1,102	1,131	1,180	1,209	1,294	1,397	1,504	1,637	8.8%	4.2%
Transportation	175	164	195	204	200	203	169	154	178	15.6%	0.2%
West Coast Arizona											
	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	1,280	1,263	1,335	1,353	1,360	1,373	1,287	1,275	1,365	7.1%	0.7%
Visitor Spending	1,150	1,138	1,191	1,206	1,211	1,221	1,194	1,191	1,272	6.8%	1.1%
Non-transportation	970	970	991	1,003	1,011	1,027	1,038	1,054	1,117	5.9%	1.6%
Transportation	179	168	200	203	200	194	156	136	155	13.5%	-1.6%
North Central Arizona											
	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	915	877	923	973	996	1,024	1,026	1,042	1,137	9.2%	2.4%
Visitor Spending	843	813	850	898	920	947	975	996	1,085	8.9%	2.8%
Non-transportation	737	715	732	772	797	826	877	911	988	8.4%	3.3%
Transportation	107	98	118	126	123	121	98	85	97	14.8%	-1.0%
Phoenix & Central Arizona											
	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	11,261	11,089	11,863	12,219	12,638	13,264	13,636	13,891	14,727	6.0%	3.0%
Visitor Spending	8,620	8,614	9,130	9,290	9,582	10,140	10,639	10,954	11,580	5.7%	3.3%
Non-transportation	6,228	6,189	6,500	6,641	6,858	7,269	7,783	8,129	8,574	5.5%	3.6%
Transportation	2,392	2,425	2,630	2,649	2,724	2,870	2,856	2,825	3,006	6.4%	2.6%
Tucson & Southern Arizona											
	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	3,299	3,207	3,267	3,461	3,432	3,503	3,432	3,305	3,552	7.5%	0.8%
Visitor Spending	2,719	2,671	2,668	2,771	2,805	2,874	2,861	2,756	2,957	7.3%	0.9%
Non-transportation	2,132	2,112	2,071	2,161	2,206	2,266	2,299	2,232	2,386	6.9%	1.3%
Transportation	587	559	597	609	598	608	562	524	571	9.1%	-0.3%

Details may not add to totals due to rounding.

Arizona Regional Travel-Generated Earnings, 2008-2017p

(\$Millions)

	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Northern Arizona	391	375	384	401	414	443	471	500	547	9.5%	3.8%
West Coast Arizona	309	297	300	301	306	323	334	354	383	8.1%	2.4%
North Central Arizona	246	220	218	231	242	259	276	294	322	9.5%	3.0%
Phoenix & Central Arizona	3,461	3,398	3,588	3,716	3,854	4,020	4,309	4,478	4,727	5.5%	3.5%
Tucson & Southern Arizona	712	679	685	744	730	781	826	838	911	8.7%	2.8%
Arizona	5,118	4,969	5,176	5,393	5,546	5,827	6,216	6,464	6,889	6.6%	3.4%

Arizona Regional Travel-Generated Employment, 2008-2017p

(Thousands)

	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Northern Arizona	16.8	16.0	16.1	16.2	16.6	17.2	17.6	18.3	19.0	3.3%	1.3%
West Coast Arizona	13.7	13.2	13.3	13.2	13.1	13.5	14.0	14.4	14.8	2.4%	0.8%
North Central Arizona	11.5	10.1	10.1	10.4	10.5	11.2	11.5	12.0	12.3	3.2%	0.8%
Phoenix & Central Arizona	94.5	88.1	90.8	93.0	95.8	100.2	105.2	108.1	108.8	0.6%	1.6%
Tucson & Southern Arizona	30.1	28.5	28.4	29.7	29.5	30.6	31.1	31.3	32.2	2.9%	0.8%
Arizona	166.6	155.9	158.7	162.5	165.6	172.7	179.5	184.2	187.1	1.6%	1.3%

Travel-Generated Employment, 2017p



■ North Central Arizona	6.6%
■ Northern Arizona	10.1%
■ Phoenix & Central Arizona	58.1%
■ Tucson & Southern Arizona	17.2%
■ West Coast Arizona	7.9%
Total:	100.0%

Travel-Generated Earnings, 2017p



■ North Central Arizona	4.7%
■ Northern Arizona	7.9%
■ Phoenix & Central Arizona	68.6%
■ Tucson & Southern Arizona	13.2%
■ West Coast Arizona	5.6%
Total:	100.0%

Northern Arizona Travel Impacts

2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	1,307	1,266	1,325	1,383	1,408	1,497	1,567	1,658	1,815
Other Travel*	80	73	86	99	102	101	87	75	81
Total	1,386	1,339	1,411	1,483	1,510	1,598	1,653	1,733	1,896
Visitor Spending by Type of Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	803	764	795	840	863	934	1,007	1,088	1,214
Private Home	142	145	157	161	159	163	158	157	163
Campground	49	48	50	50	50	49	47	47	49
Vacation Home	89	89	92	94	95	97	97	99	100
Day Travel	223	220	230	238	242	253	258	267	290
Total	1,307	1,266	1,325	1,383	1,408	1,497	1,567	1,658	1,815
Visitor Spending by Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	363	344	361	381	398	439	494	546	604
Food Service	304	309	315	331	340	364	390	422	463
Food Stores	78	76	80	83	83	88	93	95	99
Local Tran. & Gas	167	150	181	190	186	187	153	138	159
Arts, Ent. & Rec.	181	176	177	181	184	193	202	215	230
Retail Sales	206	198	198	205	204	211	218	227	241
Visitor Air Tran.	8	13	14	14	13	15	17	16	19
Total	1,307	1,266	1,325	1,383	1,408	1,497	1,567	1,658	1,815
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	243	231	231	244	254	268	284	301	332
Arts, Ent. & Rec.	83	91	99	100	102	112	118	126	138
Retail**	46	39	40	40	40	43	46	50	53
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	6	6	6	6	5	7	8	9	10
Other Travel*	13	7	8	11	13	14	14	14	14
Total	391	375	384	401	414	443	471	500	547
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	10,280	9,860	9,890	10,010	10,190	10,420	10,600	11,030	11,450
Arts, Ent. & Rec.	4,140	4,250	4,230	4,130	4,310	4,570	4,640	4,930	5,070
Retail**	1,870	1,560	1,590	1,580	1,560	1,620	1,700	1,800	1,860
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	120	110	120	100	100	120	150	180	190
Other Travel*	420	230	260	370	420	460	490	400	380
Total	16,830	16,000	16,090	16,190	16,580	17,200	17,590	18,340	18,950
Government Revenue Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	59	60	62	64	64	70	77	84	90
State Tax Receipts	60	61	67	69	66	67	72	76	84
Total	120	122	129	134	131	138	149	160	175

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

**Retail includes gasoline. Details may not add to totals due to rounding.

***STVR stands for Short Term Vacation Rental

Northern Arizona includes Apache, Coconino and Navajo counties.

West Coast Arizona Travel Impacts

2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	1,150	1,138	1,191	1,206	1,211	1,221	1,194	1,191	1,272
Other Travel*	130	126	144	147	148	152	93	84	93
Total	1,280	1,263	1,335	1,353	1,360	1,373	1,287	1,275	1,365
Visitor Spending by Type of Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	259	253	278	277	267	279	293	306	341
Private Home	247	250	265	265	277	272	259	256	281
Campground	125	126	133	128	122	120	117	116	119
Vacation Home	99	99	104	106	106	108	108	110	113
Day Travel	420	410	412	429	440	441	416	402	418
Total	1,150	1,138	1,191	1,206	1,211	1,221	1,194	1,191	1,272
Visitor Spending by Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	135	124	133	132	128	137	148	157	173
Food Service	245	259	266	271	279	284	292	304	330
Food Stores	128	124	126	131	135	138	135	130	133
Local Tran. & Gas	167	156	188	191	188	180	141	122	140
Arts, Ent. & Rec.	251	251	259	255	250	250	254	261	274
Retail Sales	212	211	206	214	219	218	209	203	208
Visitor Air Tran.	12	12	12	12	12	14	15	14	15
Total	1,150	1,138	1,191	1,206	1,211	1,221	1,194	1,191	1,272
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	130	136	140	137	144	150	172	187	206
Arts, Ent. & Rec.	106	95	94	98	95	103	105	108	116
Retail**	56	50	49	49	50	52	52	52	54
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	1	1	0	0	0	0	1	1
Other Travel*	17	15	16	16	17	19	5	7	7
Total	309	297	300	301	306	323	334	354	383
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	6,510	6,630	6,810	6,440	6,660	6,810	7,540	7,950	8,240
Arts, Ent. & Rec.	4,570	4,230	4,170	4,550	4,250	4,440	4,600	4,550	4,600
Retail**	2,010	1,770	1,740	1,700	1,700	1,720	1,690	1,680	1,700
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	20	10	10	10	10	10	10
Other Travel*	630	530	530	520	530	550	190	240	230
Total	13,730	13,170	13,270	13,210	13,140	13,520	14,040	14,440	14,790
Government Revenue Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	42	42	43	43	43	43	45	47	51
State Tax Receipts	53	56	59	60	58	56	57	57	62
Total	95	98	102	102	100	99	102	104	114

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

**Retail includes gasoline. Details may not add to totals due to rounding.

***STVR stands for Short Term Vacation Rental

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

North Central Arizona Travel Impacts

2008-2017p

Total Direct Travel Spending (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	843	813	850	898	920	947	975	996	1,085
Other Travel*	71	64	73	75	77	78	51	46	52
Total	915	877	923	973	996	1,024	1,026	1,042	1,137

Visitor Spending by Type of Accommodation (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	277	250	261	293	312	332	365	387	449
Private Home	115	118	127	130	130	131	128	126	134
Campground	26	25	27	27	27	28	27	27	28
Vacation Home	38	37	39	39	40	41	41	42	43
Day Travel	388	383	397	408	411	415	413	413	430
Total	843	813	850	898	920	947	975	996	1,085

Visitor Spending by Commodity Purchased (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	139	121	126	141	153	167	192	211	245
Food Service	157	161	166	176	183	190	202	211	231
Food Stores	62	61	64	66	67	70	72	72	74
Local Tran. & Gas	106	97	117	124	122	120	97	84	96
Arts, Ent. & Rec.	268	261	263	273	277	280	289	295	311
Retail Sales	110	111	113	116	117	118	121	122	127
Visitor Air Tran.	0	1	1	2	1	1	1	1	1
Total	843	813	850	898	920	947	975	996	1,085

Industry Earnings Generated by Travel Spending (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	107	96	100	110	120	129	146	159	178
Arts, Ent. & Rec.	102	93	87	89	89	95	98	101	108
Retail**	28	24	25	25	25	26	28	29	31
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	1	1
Other Travel*	9	7	6	6	7	8	3	3	4
Total	246	220	218	231	242	259	276	294	322

Industry Employment Generated by Travel Spending (Jobs)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	4,710	4,160	4,280	4,600	4,830	5,100	5,490	5,870	6,190
Arts, Ent. & Rec.	5,230	4,750	4,630	4,590	4,510	4,830	4,840	4,870	4,910
Retail**	1,160	980	1,000	980	990	1,020	1,070	1,080	1,100
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	10	10	10	10	10	10	10
Other Travel*	350	260	230	220	220	230	120	130	130
Total	11,460	10,150	10,150	10,390	10,550	11,190	11,530	11,960	12,340

Government Revenue Generated by Travel Spending (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	33	32	32	34	36	38	41	44	50
State Tax Receipts	39	39	42	44	43	43	45	47	51
Total	72	71	74	78	79	81	87	91	102

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

**Retail includes gasoline. Details may not add to totals due to rounding.

***STVR stands for Short Term Vacation Rental

North Central Arizona includes Gila and Yavapai counties.

Phoenix & Central Arizona Travel Impacts

2008-2017p

Total Direct Travel Spending (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	8,620	8,614	9,130	9,290	9,582	10,140	10,639	10,954	11,580
Other Travel*	2,642	2,475	2,733	2,928	3,055	3,125	2,997	2,937	3,147
Total	11,261	11,089	11,863	12,219	12,638	13,264	13,636	13,891	14,727

Visitor Spending by Type of Accommodation (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	4,481	4,304	4,575	4,695	4,872	5,212	5,613	5,842	6,219
Private Home	2,355	2,492	2,623	2,624	2,696	2,828	2,918	2,970	3,112
Campground	289	278	293	297	304	321	314	315	327
Vacation Home	322	332	345	357	365	378	386	397	411
Day Travel	1,173	1,208	1,294	1,318	1,346	1,401	1,408	1,430	1,512
Total	8,620	8,614	9,130	9,290	9,582	10,140	10,639	10,954	11,580

Visitor Spending by Commodity Purchased (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	1,680	1,412	1,522	1,568	1,642	1,794	2,025	2,115	2,265
Food Service	1,852	1,995	2,091	2,156	2,243	2,385	2,547	2,706	2,889
Food Stores	311	318	339	343	352	375	394	399	408
Local Tran. & Gas	1,111	1,114	1,268	1,297	1,313	1,350	1,238	1,202	1,295
Arts, Ent. & Rec.	1,140	1,157	1,192	1,205	1,229	1,280	1,332	1,387	1,443
Retail Sales	1,245	1,307	1,356	1,368	1,391	1,435	1,485	1,522	1,569
Visitor Air Tran.	1,281	1,311	1,363	1,353	1,411	1,520	1,618	1,623	1,711
Total	8,620	8,614	9,130	9,290	9,582	10,140	10,639	10,954	11,580

Industry Earnings Generated by Travel Spending (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	1,258	1,226	1,289	1,328	1,396	1,473	1,572	1,648	1,767
Arts, Ent. & Rec.	539	539	545	587	616	670	701	738	783
Retail**	233	217	230	227	228	246	265	281	291
Ground Tran.	102	109	116	119	120	129	139	149	157
Visitor Air Tran.	543	564	612	602	602	610	684	693	721
Other Travel*	786	743	795	854	893	892	947	971	1,008
Total	3,461	3,398	3,588	3,716	3,854	4,020	4,309	4,478	4,727

Industry Employment Generated by Travel Spending (Jobs)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	44,960	43,070	44,580	45,030	47,160	48,480	50,120	51,860	52,550
Arts, Ent. & Rec.	18,040	16,830	17,170	17,870	18,780	20,010	21,350	21,490	21,480
Retail**	7,290	6,660	6,760	6,670	6,830	7,190	7,620	7,940	8,000
Ground Tran.	2,770	2,780	2,920	2,970	3,040	3,160	3,320	3,600	3,740
Visitor Air Tran.	7,470	6,770	7,040	7,160	7,000	7,300	7,720	7,820	7,780
Other Travel*	13,930	11,990	12,340	13,290	13,010	14,100	15,070	15,400	15,210
Total	94,460	88,100	90,800	92,990	95,820	100,240	105,190	108,110	108,760

Government Revenue Generated by Travel Spending (\$Million)

	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	472	467	492	495	514	536	586	613	724
State Tax Receipts	424	445	491	503	495	491	522	538	580
Total	897	912	983	998	1,010	1,026	1,108	1,151	1,303

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

**Retail includes gasoline. Details may not add to totals due to rounding.

***STVR stands for Short Term Vacation Rental

Phoenix & Central Arizona includes Maricopa and Pinal counties.

Tucson & Southern Arizona Travel Impacts
2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	2,719	2,671	2,668	2,771	2,805	2,874	2,861	2,756	2,957
Other Travel*	580	536	599	690	627	629	571	549	595
Total	3,299	3,207	3,267	3,461	3,432	3,503	3,432	3,305	3,552

Visitor Spending by Type of Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	1,114	1,097	1,093	1,118	1,131	1,169	1,227	1,197	1,292
Private Home	569	575	598	600	592	604	599	589	623
Campground	49	42	45	46	45	45	43	42	44
Vacation Home	56	56	58	60	60	61	61	62	63
Day Travel	932	901	874	947	976	995	931	866	935
Total	2,719	2,671	2,668	2,771	2,805	2,874	2,861	2,756	2,957

Visitor Spending by Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	428	391	388	394	398	414	443	440	473
Food Service	616	652	651	682	699	724	760	756	817
Food Stores	290	274	265	289	302	313	299	275	286
Local Tran. & Gas	364	355	394	411	408	406	358	319	352
Arts, Ent. & Rec.	209	211	210	212	211	214	220	217	227
Retail Sales	590	584	557	585	597	600	578	544	582
Visitor Air Tran.	223	204	203	198	190	202	204	205	219
Total	2,719	2,671	2,668	2,771	2,805	2,874	2,861	2,756	2,957

Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	383	375	385	411	416	444	481	491	539
Arts, Ent. & Rec.	96	94	92	93	93	104	107	107	114
Retail**	131	117	113	116	117	123	123	119	128
Ground Tran.	25	27	28	29	29	31	33	33	38
Visitor Air Tran.	12	11	10	9	8	10	11	12	12
Other Travel*	65	55	57	86	67	70	71	76	80
Total	712	679	685	744	730	781	826	838	911

Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	16,900	16,380	16,540	17,180	17,280	17,860	18,400	18,420	19,060
Arts, Ent. & Rec.	5,440	5,520	5,450	5,410	5,450	5,820	5,900	6,060	6,100
Retail**	4,770	4,140	4,000	4,000	4,020	4,120	4,050	3,870	4,020
Ground Tran.	690	700	710	740	740	750	800	800	910
Visitor Air Tran.	250	210	200	180	130	170	170	180	170
Other Travel*	2,050	1,560	1,510	2,210	1,920	1,850	1,830	1,980	1,960
Total	30,100	28,500	28,400	29,710	29,540	30,580	31,140	31,310	32,220

Government Revenue Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	99	98	97	99	99	100	106	105	98
State Tax Receipts	131	136	143	149	143	140	144	141	155
Total	229	234	240	249	241	240	249	246	253

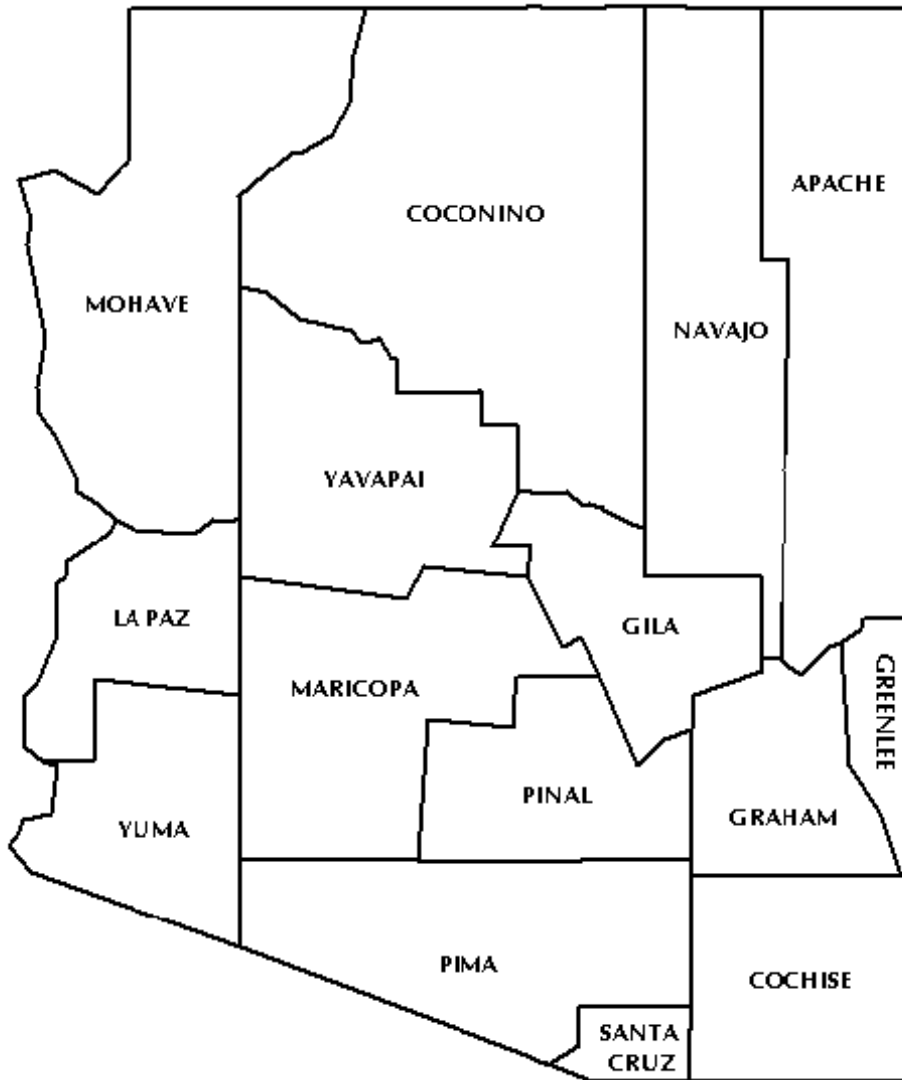
*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

**Retail includes gasoline. Details may not add to totals due to rounding.

***STVR stands for Short Term Vacation Rental

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

V. COUNTY TRAVEL IMPACTS
2008-2017p



The analysis of travel impacts at the county level provides a valuable overview of how the economic benefits of travel and tourism are distributed throughout the state.

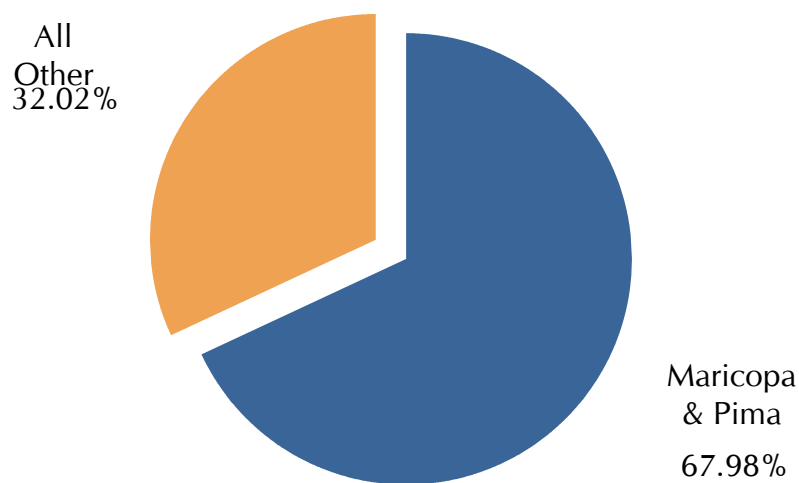
Urban areas, such as Maricopa County, tend to have highly developed travel industry infrastructure consisting of large inventories of amusement and recreation opportunities, commercial accommodations, and well-developed transportation links. Hotel/motel guests are important to these areas and, hence, a large proportion of travel expenditures are spent on overnight lodging.

In many of the less urbanized areas of Arizona, however, the economic significance of travel and tourism is actually relatively more important. The infrastructure that serves visitors to Maricopa County also serves local residents. Most of the spending on recreation and food services in Maricopa County is by local residents. This is not the case in most other less urbanized areas of the state -leisure and hospitality businesses are generally much more dependent on visitor spending rather than local residents.

In the graph below, the two most populous counties in Arizona, Maricopa and Pima, are compared with the thirteen other counties in the state with respect to their share of total employment -two-thirds of all travel-generated jobs in the state are in the two most populous counties.

Distribution of Travel-Generated Employment, 2017p

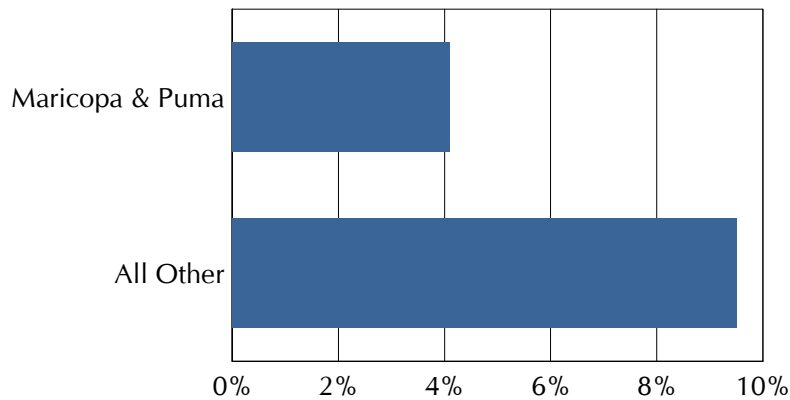
Percent of State Direct Travel



Source: Dean Runyan Associates, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. Total and travel-generated employments estimates by Dean Runyan Associates.

However, as a group the less urbanized counties in the state actually have a higher proportion of travel-generated employment in relation to the total employment of the county. This is shown graphically below. Four percent of all employment in Maricopa and Pima counties is travel-generated. By contrast, the proportion is more than double for the other Arizona counties.

Percent of Total Area Employment That is Travel-Generated, 2017p



Source: Dean Runyan Associates, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. Total and travel-generated employment estimates by Dean Runyan Associates. Travel-generated employment in Maricopa and Pima counties constitutes 4 percent of all employment in those counties. The comparable figure for other Arizona counties is slightly over 9 percent.

In general, the employment and earnings estimates provided in the preceding figures are probably the best measure at the county level of the relative importance of travel and tourism for local economies. The following table provides estimates for individual counties. Total employment includes all full-time and part-time wage and salary employment and self-employment. Because total employment includes all *jobs*, regardless of the hours worked, the average annual earnings of the job or the number of individuals employed, this indicator is in some respects less useful than earnings estimates. Nonetheless, the distribution of counties is similar for earnings and employment.

Travel-Generated Employment and Earnings as Percent of Total, 2017p

	Employment			Earnings (\$Millions)		
	Total	Travel	Percent Travel	Total	Travel	Percent Travel
Apache	28,600	1,650	5.8%	\$1,168	\$37	3.2%
Cochise	52,340	3,630	6.9%	\$2,844	\$84	3.0%
Coconino	86,390	13,200	15.3%	\$4,140	\$403	9.7%
Gila	21,240	2,940	13.9%	\$899	\$78	8.7%
Graham	12,200	880	7.2%	\$555	\$14	2.5%
Greenlee	5,300	110	2.1%	\$390	\$2	0.6%
La Paz	8,030	1,350	16.8%	\$357	\$36	10.0%
Maricopa	2,585,260	101,660	3.9%	\$145,736	\$4,542	3.1%
Mohave	70,450	7,040	10.0%	\$2,851	\$183	6.4%
Navajo	41,860	4,110	9.8%	\$1,737	\$107	6.1%
Pima	516,980	25,500	4.9%	\$25,613	\$756	3.0%
Pinal	93,780	7,090	7.6%	\$4,003	\$185	4.6%
Santa Cruz	20,530	2,100	10.2%	\$1,069	\$55	5.1%
Yavapai	100,880	9,400	9.3%	\$3,881	\$244	6.3%
Yuma	88,730	6,400	7.2%	\$5,052	\$164	3.3%

Source: Dean Runyan Associates, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. Total and travel-generated employment estimates by Dean Runyan Associates.

Note: Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

Direct travel impact estimates can be found on the following pages. As noted in the appendix to this report, county level estimates are necessarily less reliable than the statewide estimates. Furthermore, estimates for the smallest counties are less reliable than those for larger counties due to survey sample sizes and other data limitations. For this reason, small changes in year-to-year estimates are less important than longer-term trends.

2017p Arizona County Travel Impacts

Related Travel-Generated Impacts

	Travel Spending		Earnings (\$Million)	Employment (jobs)	Taxes		
	Total (\$Million)	Visitor (\$Million)			Local (\$Million)	State (\$Million)	Total (\$Million)
Apache	118	106	37	1,650	3.9	5.9	9.8
Cochise	326	304	84	3,630	13.5	14.9	28.4
Coconino	1,447	1,397	403	13,200	72.5	62.3	134.8
Gila	294	285	78	2,940	9.5	13.4	22.9
Graham	63	56	14	880	2.7	3.0	5.7
Greenlee	13	12	2	110	0.3	0.7	0.9
La Paz	146	142	36	1,350	5.3	6.4	11.7
Maricopa	14,036	10,963	4,542	101,660	698.6	546.3	1,245.0
Mohave	584	541	183	7,040	23.3	27.8	51.1
Navajo	331	312	107	4,110	14.0	16.0	30.0
Pima	2,911	2,353	756	25,500	74.1	126.7	200.8
Pinal	691	617	185	7,090	25.3	33.3	58.5
Santa Cruz	239	231	55	2,100	7.9	9.7	17.6
Yavapai	843	800	244	9,400	40.9	38.0	78.9
Yuma	635	588	164	6,400	22.6	28.2	50.8
Arizona	22,677	18,708	6,889	187,060	1,014	932	1,947

Details may not add to totals due to rounding.

The sum of county visitor spending is less than statewide visitor spending because a portion of county ground transportation is allocated to "other travel" at the county level.

Arizona County Travel-Generated Earnings, 2008-2017p
(\$Millions)

	2008	2010	2011	2012	2013	2014	2015	2016	2017	Annual Percent Chg.	
										16-17p	08-17p
Apache	32	31	31	32	29	31	33	36	37	2.5%	1.7%
Cochise	85	81	78	77	77	79	81	79	84	7.0%	-0.1%
Coconino	284	267	276	284	299	323	343	365	403	10.4%	4.0%
Gila	66	56	55	58	61	65	69	73	78	6.4%	1.9%
Graham	13	11	12	13	14	15	12	12	14	14.2%	0.8%
Greenlee	2	2	2	2	3	3	3	2	2	12.5%	-0.2%
La Paz	29	29	31	31	33	33	34	34	36	5.1%	2.4%
Maricopa	3,339	3,273	3,460	3,582	3,723	3,884	4,162	4,310	4,542	5.4%	3.5%
Mohave	136	125	125	124	134	145	151	165	183	10.8%	3.3%
Navajo	76	77	77	85	86	89	94	98	107	8.7%	3.8%
Pima	557	537	549	605	587	631	674	693	756	9.1%	3.4%
Pinal	122	125	128	134	131	137	147	168	185	9.6%	4.7%
Santa Cruz	54	49	44	47	49	53	57	53	55	4.2%	0.1%
Yavapai	180	164	164	173	181	194	207	221	244	10.5%	3.4%
Yuma	144	143	144	146	139	145	150	155	164	6.0%	1.5%

Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

Arizona County Travel-Generated Employment, 2008-2017p

	2008	2010	2011	2012	2013	2014	2015	2016	2017	Annual Percent Chg.	
										16-17p	08-17p
Apache	1,670	1,660	1,640	1,590	1,480	1,540	1,610	1,700	1,650	-3.1%	-0.2%
Cochise	4,370	4,070	3,910	3,750	3,710	3,750	3,760	3,580	3,630	1.4%	-2.0%
Coconino	11,570	10,820	10,950	10,960	11,420	11,890	12,030	12,640	13,200	4.4%	1.5%
Gila	3,010	2,670	2,670	2,660	2,640	2,690	2,740	2,920	2,940	0.8%	-0.2%
Graham	1,080	880	900	950	1,050	1,050	840	810	880	7.7%	-2.3%
Greenlee	140	130	130	140	150	160	140	110	110	6.4%	-2.7%
La Paz	1,230	1,200	1,320	1,310	1,380	1,380	1,330	1,350	1,350	-0.3%	1.0%
Maricopa	89,200	83,060	85,430	87,480	90,160	94,530	99,180	101,270	101,660	0.4%	1.5%
Mohave	6,400	5,900	5,780	5,560	5,750	6,100	6,450	6,710	7,040	4.8%	1.1%
Navajo	3,590	3,520	3,510	3,650	3,690	3,760	3,940	4,000	4,110	2.7%	1.5%
Pima	22,240	21,440	21,630	22,950	22,600	23,440	24,050	24,700	25,500	3.3%	1.5%
Pinal	5,260	5,050	5,360	5,500	5,660	5,710	6,010	6,840	7,090	3.7%	3.4%
Santa Cruz	2,260	2,000	1,840	1,920	2,020	2,180	2,360	2,110	2,100	-0.5%	-0.8%
Yavapai	8,450	7,480	7,470	7,730	7,910	8,500	8,790	9,040	9,400	4.0%	1.2%
Yuma	6,110	6,070	6,170	6,340	6,010	6,050	6,260	6,370	6,400	0.5%	0.5%

Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

Arizona County Direct Travel Spending, 2008-2017p
(\$Millions)

	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Apache											
Total Spending	133	122	127	129	117	119	115	116	118	1.2%	-1.3%
Visitor Spending	118	108	110	111	100	103	102	105	106	0.3%	-1.3%
Non-transportation	100	92	90	91	81	84	88	92	92	-0.7%	-0.9%
Transportation	19	17	20	20	19	19	15	13	14	7.0%	-3.3%
Cochise											
Total Spending	376	370	362	350	343	338	325	307	326	6.3%	-1.6%
Visitor Spending	346	343	329	317	311	307	302	287	304	6.0%	-1.4%
Non-transportation	295	295	276	264	260	258	264	255	268	5.3%	-1.0%
Transportation	51	47	54	53	51	48	39	32	36	11.8%	-3.8%
Coconino											
Total Spending	945	942	996	1,050	1,088	1,172	1,236	1,311	1,447	10.4%	4.9%
Visitor Spending	903	904	952	994	1,027	1,111	1,182	1,264	1,397	10.5%	5.0%
Non-transportation	787	790	818	853	888	967	1,059	1,152	1,265	9.9%	5.4%
Transportation	116	113	134	141	139	144	123	113	132	17.1%	1.4%
Gila											
Total Spending	260	257	266	279	282	278	278	279	294	5.6%	1.4%
Visitor Spending	249	246	253	266	269	266	268	270	285	5.4%	1.5%
Non-transportation	216	216	217	228	232	230	240	246	257	4.7%	2.0%
Transportation	33	30	36	38	37	35	28	25	27	11.6%	-1.9%
Graham											
Total Spending	56	51	58	62	73	76	57	55	63	13.8%	1.3%
Visitor Spending	48	44	49	53	64	67	50	49	56	14.0%	1.8%
Non-transportation	39	36	40	43	53	56	43	43	49	13.7%	2.4%
Transportation	9	8	10	10	11	11	7	6	7	16.2%	-1.6%
Greenlee											
Total Spending	11	11	12	13	15	16	12	12	13	11.5%	1.8%
Visitor Spending	10	9	10	11	13	14	11	11	12	11.6%	2.2%
Non-transportation	8	7	8	9	11	11	9	9	10	11.2%	2.9%
Transportation	2	2	2	2	2	2	2	1	2	14.3%	-0.9%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

Arizona County Direct Travel Spending, 2008-2017p
(\$Millions)

La Paz	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	133	128	139	142	144	141	140	139	146	4.6%	1.0%
Visitor Spending	129	124	135	138	139	136	136	136	142	4.4%	1.1%
Non-transportation	110	107	113	116	118	116	120	122	127	3.5%	1.5%
Transportation	19	17	21	22	22	20	16	14	16	11.5%	-2.1%
Maricopa	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	10,734	10,507	11,232	11,594	12,017	12,620	12,995	13,255	14,036	5.9%	3.0%
Visitor Spending	8,164	8,106	8,586	8,756	9,051	9,585	10,071	10,383	10,963	5.6%	3.3%
Non-transportation	5,845	5,756	6,048	6,198	6,416	6,804	7,288	7,621	8,029	5.4%	3.6%
Transportation	2,318	2,350	2,538	2,557	2,635	2,781	2,783	2,762	2,934	6.2%	2.7%
Mohave	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	522	530	545	554	580	581	524	529	584	10.3%	1.3%
Visitor Spending	450	461	467	474	497	494	484	490	541	10.4%	2.1%
Non-transportation	371	385	380	384	405	408	416	431	472	9.4%	2.7%
Transportation	80	76	87	90	92	87	68	59	69	17.9%	-1.5%
Navajo	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	308	275	289	304	306	307	302	305	331	8.2%	0.8%
Visitor Spending	286	254	264	278	281	283	283	289	312	8.1%	1.0%
Non-transportation	246	221	223	236	239	243	250	260	280	7.5%	1.4%
Transportation	40	34	41	43	42	40	32	28	32	13.6%	-2.3%
Pima	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	2,573	2,513	2,595	2,764	2,713	2,784	2,772	2,697	2,911	7.9%	1.4%
Visitor Spending	2,043	2,022	2,051	2,129	2,140	2,208	2,240	2,183	2,353	7.8%	1.6%
Non-transportation	1,540	1,541	1,542	1,611	1,631	1,686	1,745	1,713	1,843	7.6%	2.0%
Transportation	503	481	509	519	508	522	495	469	510	8.7%	0.2%
Pinal	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	527	582	631	625	621	644	640	636	691	8.8%	3.1%
Visitor Spending	456	509	544	535	532	555	568	572	617	8.0%	3.4%
Non-transportation	383	433	452	442	442	465	495	508	545	7.2%	4.0%
Transportation	74	76	92	92	89	89	73	63	73	14.4%	-0.2%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

Arizona County Direct Travel Spending, 2008-2017p
(\$Millions)

Santa Cruz	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	283	263	239	271	288	289	266	234	239	2.3%	-1.9%
Visitor Spending	273	254	228	260	278	278	257	227	231	1.9%	-1.8%
Non-transportation	250	233	206	235	252	254	239	212	215	1.3%	-1.6%
Transportation	23	21	22	25	25	24	19	14	16	11.6%	-3.9%
Yavapai	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	655	620	657	695	715	746	748	763	843	10.5%	2.9%
Visitor Spending	595	566	597	632	651	681	707	725	800	10.3%	3.4%
Non-transportation	521	499	515	544	565	596	637	665	730	9.7%	3.8%
Transportation	74	67	82	87	86	85	69	60	70	16.1%	-0.6%
Yuma	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	625	606	650	657	635	651	623	606	635	4.8%	0.2%
Visitor Spending	570	553	589	594	575	590	575	564	588	4.3%	0.4%
Non-transportation	489	478	498	503	488	504	502	501	518	3.6%	0.6%
Transportation	81	76	92	91	87	87	73	64	70	9.8%	-1.6%
Arizona	2008	2010	2011	2012	2013	2014	2015	2016	2017	16-17p	08-17p
Total Spending	18,142	17,775	18,798	19,489	19,936	20,762	21,034	21,245	22,677	6.7%	2.5%
Visitor Spending	14,639	14,502	15,165	15,548	15,927	16,678	17,235	17,555	18,708	6.6%	2.8%
Non-transportation	11,199	11,088	11,425	11,757	12,081	12,683	13,394	13,831	14,701	6.3%	3.1%
Transportation	3,439	3,414	3,740	3,791	3,845	3,995	3,841	3,724	4,007	7.6%	1.7%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

APACHE COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	118.4	108.2	109.9	111.5	100.0	102.9	102.2	105.3	105.5
Other Travel*	14.7	13.8	16.6	17.2	16.5	16.1	12.8	11.2	12.3
Total	133.1	122.0	126.5	128.6	116.5	119.1	114.9	116.5	117.9
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	59.6	49.8	46.8	46.8	37.1	38.5	40.3	43.1	43.2
Private Home	34.8	34.6	38.1	39.0	37.7	39.1	37.1	37.1	37.1
Campground	7.1	7.0	7.5	7.7	7.5	7.4	7.1	6.9	7.2
Vacation Home	12.0	12.1	12.7	13.0	12.9	13.1	13.0	13.4	13.3
Day Travel	4.8	4.6	4.9	5.0	4.7	4.8	4.7	4.7	4.8
Total	118.4	108.2	109.9	111.5	100.0	102.9	102.2	105.3	105.5
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	26.1	22.2	21.1	21.0	17.3	17.9	19.1	20.7	20.6
Food Service	29.3	28.6	28.7	29.4	27.4	28.8	29.9	31.9	32.2
Food Stores	9.6	9.3	9.8	10.0	9.6	10.1	10.2	10.4	10.1
Local Tran. & Gas	18.7	16.5	19.8	20.4	18.7	18.5	14.7	12.9	13.8
Arts, Ent. & Rec.	8.9	8.3	8.2	8.3	7.6	7.8	8.0	8.3	8.2
Retail Sales	25.7	23.3	22.4	22.4	19.4	19.9	20.3	21.0	20.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	118.4	108.2	109.9	111.5	100.0	102.9	102.2	105.3	105.5
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	20.7	21.8	22.1	23.0	20.8	21.8	23.5	26.0	26.8
Arts, Ent. & Rec.	4.3	4.0	3.7	3.7	3.4	4.0	4.1	4.3	4.4
Retail**	5.8	4.8	4.7	4.6	4.1	4.4	4.7	5.0	5.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.8	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6
Total	31.6	31.0	31.0	31.9	28.9	30.8	32.9	35.9	36.8
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	1,050	1,130	1,140	1,110	1,050	1,090	1,150	1,240	1,200
Arts, Ent. & Rec.	300	300	260	240	210	220	210	200	190
Retail**	280	210	210	200	200	210	220	230	220
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	50	20	20	20	30	30	30	30	30
Total	1,670	1,660	1,640	1,590	1,480	1,540	1,610	1,700	1,650
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	4.0	3.9	3.8	3.8	3.2	3.3	3.5	3.8	3.9
State Tax Receipts	5.9	5.9	6.1	6.2	5.3	5.4	5.5	5.8	5.9
Total	9.9	9.8	10.0	10.0	8.5	8.6	9.0	9.5	9.8

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

COCHISE COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	345.5	342.5	329.1	316.6	310.8	306.7	302.4	287.0	304.2
Other Travel*	30.3	27.5	32.9	33.2	32.2	31.3	22.8	19.8	21.9
Total	375.8	370.0	362.0	349.8	343.0	338.0	325.3	306.7	326.1
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	144.1	144.3	131.7	111.8	102.4	98.5	106.2	104.5	113.9
Private Home	62.9	65.6	69.3	68.8	68.4	67.4	66.1	62.5	65.2
Campground	9.6	9.3	10.0	10.2	10.0	9.9	9.4	9.2	9.6
Vacation Home	6.6	6.6	6.9	7.0	6.9	6.9	6.9	6.9	6.9
Day Travel	122.3	116.6	111.1	118.8	123.0	124.0	113.9	103.9	108.6
Total	345.5	342.5	329.1	316.6	310.8	306.7	302.4	287.0	304.2
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	52.1	51.9	47.2	40.2	35.2	35.5	38.4	38.8	43.5
Food Service	84.1	88.0	83.5	80.9	81.4	81.2	85.1	84.3	89.4
Food Stores	59.5	55.8	52.8	57.3	59.9	61.7	57.9	52.6	53.8
Local Tran. & Gas	50.8	47.2	53.6	53.0	51.2	48.4	38.7	32.0	35.8
Arts, Ent. & Rec.	22.8	23.0	21.8	20.1	19.6	19.0	20.0	19.7	20.3
Retail Sales	76.1	76.6	70.3	65.1	63.5	61.1	62.3	59.5	61.4
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	345.5	342.5	329.1	316.6	310.8	306.7	302.4	287.0	304.2
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	49.0	49.0	49.2	48.5	48.8	50.2	51.1	49.7	53.9
Arts, Ent. & Rec.	11.7	11.0	9.8	9.8	10.0	10.4	11.0	11.0	11.6
Retail**	21.3	18.8	17.5	16.8	16.6	17.0	17.4	16.8	17.5
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	2.7	1.7	1.7	1.7	1.8	1.9	1.1	1.2	1.2
Total	84.7	80.6	78.2	76.8	77.3	79.5	80.5	78.6	84.2
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	2,550	2,480	2,440	2,380	2,340	2,360	2,370	2,210	2,260
Arts, Ent. & Rec.	810	760	700	650	650	680	690	700	690
Retail**	880	750	700	660	650	650	650	630	630
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	120	70	70	60	70	70	50	50	50
Total	4,370	4,070	3,910	3,750	3,710	3,750	3,760	3,580	3,630
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	14.7	15.0	14.2	13.1	12.2	12.0	12.6	12.4	13.5
State Tax Receipts	15.8	16.7	16.7	16.0	15.0	14.1	14.5	14.0	14.9
Total	30.5	31.6	30.9	29.1	27.2	26.2	27.1	26.4	28.4

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

COCONINO COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	902.8	903.7	951.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4
Other Travel*	42.0	38.0	44.0	56.7	60.6	60.5	54.5	46.7	49.9
Total	944.8	941.7	995.7	1,050.2	1,088.1	1,171.6	1,236.2	1,311.2	1,447.4
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	602.3	600.0	633.4	664.9	695.2	764.3	832.3	906.3	1,013.2
Private Home	53.5	58.1	62.2	63.2	63.3	65.9	64.8	64.1	67.8
Campground	24.7	23.9	25.2	26.4	25.9	25.5	24.3	23.7	24.7
Vacation Home	31.6	31.8	32.8	33.9	34.2	35.0	35.3	36.0	36.6
Day Travel	190.6	189.9	198.1	205.2	208.9	220.3	225.1	234.3	255.2
Total	902.8	903.7	951.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	276.7	271.3	289.0	304.5	323.9	363.9	415.8	462.2	513.3
Food Service	205.6	214.8	219.8	230.7	240.5	260.6	282.2	307.9	342.2
Food Stores	48.4	48.1	50.4	52.1	53.3	57.2	60.6	62.6	66.2
Local Tran. & Gas	108.6	100.1	120.3	126.8	126.0	128.2	105.7	97.0	113.6
Arts, Ent. & Rec.	139.8	138.0	138.9	142.9	145.8	154.6	163.3	174.4	188.9
Retail Sales	116.0	118.1	119.5	122.8	124.9	131.1	137.3	144.3	154.5
Visitor Air Tran.	7.7	13.4	13.7	13.7	13.2	15.5	16.8	16.0	18.6
Total	902.8	903.7	951.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	173.9	161.6	161.3	169.3	179.4	192.1	202.2	213.6	238.0
Arts, Ent. & Rec.	65.7	69.3	77.1	74.4	76.8	85.2	90.5	97.6	107.8
Retail**	27.7	24.3	24.9	25.0	25.1	27.5	30.0	32.5	35.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	5.8	5.8	6.4	5.5	5.4	6.5	7.9	9.4	10.3
Other Travel*	10.5	5.8	6.5	10.2	11.9	12.2	12.8	12.2	12.1
Total	283.6	266.8	276.2	284.3	298.7	323.5	343.3	365.4	403.3
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	6,890	6,480	6,500	6,600	6,820	6,990	7,020	7,330	7,700
Arts, Ent. & Rec.	3,160	3,140	3,160	3,000	3,200	3,410	3,390	3,690	3,830
Retail**	1,090	930	970	950	950	990	1,050	1,110	1,160
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	120	110	120	100	100	120	150	180	190
Other Travel*	300	160	200	310	350	390	420	320	310
Total	11,570	10,820	10,950	10,960	11,420	11,890	12,030	12,640	13,200
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	44.1	45.6	47.7	48.9	50.4	55.8	61.9	67.3	72.5
State Tax Receipts	40.9	42.3	46.6	48.4	46.7	48.2	52.1	55.8	62.3
Total	85.0	87.9	94.2	97.2	97.1	104.1	114.0	123.1	134.8

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

GILA COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	248.6	246.4	253.3	266.2	269.0	265.9	268.3	270.3	284.8
Other Travel*	11.5	10.6	12.3	12.5	12.6	12.4	9.5	8.3	9.3
Total	260.1	257.0	265.6	278.7	281.6	278.3	277.8	278.6	294.1
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	42.6	40.7	39.6	47.4	50.6	48.9	53.5	56.4	64.8
Private Home	37.6	39.0	41.4	42.6	42.3	41.3	40.9	40.2	42.1
Campground	12.8	12.4	13.4	13.7	13.4	13.2	12.6	12.3	12.8
Vacation Home	13.6	13.4	13.8	14.0	14.1	14.3	14.3	14.5	14.7
Day Travel	142.0	140.9	145.1	148.4	148.6	148.2	147.0	146.9	150.4
Total	248.6	246.4	253.3	266.2	269.0	265.9	268.3	270.3	284.8
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	18.0	16.9	16.5	18.7	19.6	20.0	22.4	23.9	27.1
Food Service	43.2	45.4	46.0	48.8	50.2	50.3	53.2	55.4	58.9
Food Stores	20.2	20.2	21.1	21.6	21.8	22.1	22.8	22.6	22.8
Local Tran. & Gas	32.6	30.3	36.2	38.2	37.3	35.5	28.5	24.6	27.4
Arts, Ent. & Rec.	102.2	100.5	100.3	104.6	105.8	104.4	107.3	109.6	113.8
Retail Sales	32.4	33.1	33.3	34.2	34.3	33.6	34.1	34.2	34.8
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	248.6	246.4	253.3	266.2	269.0	265.9	268.3	270.3	284.8
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	23.4	22.4	22.3	24.7	26.9	28.5	30.9	34.1	37.1
Arts, Ent. & Rec.	32.8	25.2	23.8	24.6	25.6	28.0	28.8	29.5	30.9
Retail**	9.0	8.0	8.1	8.1	8.0	8.2	8.7	9.0	9.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.8	0.5	0.4	0.4	0.5	0.5	0.4	0.5	0.5
Total	65.9	56.1	54.6	57.7	61.1	65.3	68.8	73.1	77.8
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	1,190	1,120	1,110	1,170	1,240	1,300	1,380	1,500	1,540
Arts, Ent. & Rec.	1,390	1,200	1,220	1,150	1,050	1,030	1,000	1,040	1,030
Retail**	380	330	330	320	330	330	340	350	350
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	40	20	20	20	20	20	20	20	20
Total	3,010	2,670	2,670	2,660	2,640	2,690	2,740	2,920	2,940
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	7.7	7.4	7.3	7.6	7.6	7.7	8.2	8.6	9.5
State Tax Receipts	11.3	11.4	11.8	12.4	12.1	11.8	12.3	12.5	13.4
Total	19.0	18.8	19.1	20.0	19.8	19.5	20.5	21.1	22.9

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

GRAHAM COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	48.0	43.7	49.4	53.4	63.7	67.1	50.1	49.2	56.1
Other Travel*	8.0	7.5	8.9	9.0	9.0	9.0	6.8	5.8	6.5
Total	56.0	51.2	58.2	62.5	72.7	76.1	56.9	55.0	62.6
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	23.1	18.0	21.2	25.1	34.7	37.5	23.7	23.0	28.2
Private Home	17.6	18.5	20.3	20.3	20.5	20.9	18.8	18.6	19.8
Campground	1.8	1.7	1.9	1.9	1.9	1.8	1.8	1.7	1.8
Vacation Home	0.6	0.6	0.6	0.6	0.6	0.7	0.6	0.6	0.7
Day Travel	4.9	4.9	5.4	5.6	6.0	6.3	5.2	5.2	5.7
Total	48.0	43.7	49.4	53.4	63.7	67.1	50.1	49.2	56.1
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	8.4	6.4	7.4	9.0	13.2	13.7	8.4	8.3	10.5
Food Service	12.7	12.6	13.7	14.6	16.9	18.2	15.2	15.6	17.5
Food Stores	4.2	4.3	4.6	4.7	5.0	5.3	4.8	4.8	5.0
Local Tran. & Gas	8.5	7.8	9.7	10.2	10.8	10.8	7.3	6.3	7.4
Arts, Ent. & Rec.	3.6	3.4	3.6	3.7	4.2	4.5	3.7	3.7	4.0
Retail Sales	10.5	9.3	10.3	11.2	13.6	14.6	10.7	10.5	11.8
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	48.0	43.7	49.4	53.4	63.7	67.1	50.1	49.2	56.1
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	7.7	6.3	6.8	7.6	8.8	9.0	7.3	7.3	8.5
Arts, Ent. & Rec.	2.2	2.1	2.2	2.3	2.4	2.6	2.1	2.1	2.4
Retail**	2.4	2.0	2.2	2.2	2.5	2.8	2.3	2.3	2.6
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.5	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.3
Total	12.9	10.7	11.6	12.5	14.1	14.9	12.1	12.1	13.8
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	550	410	430	470	550	540	420	410	450
Arts, Ent. & Rec.	410	370	370	380	390	400	320	300	320
Retail**	100	80	90	90	100	100	90	90	90
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	30	20	20	20	20	20	10	10	10
Total	1,080	880	900	950	1,050	1,050	840	810	880
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	2.1	1.8	2.0	2.3	2.9	3.1	2.2	2.2	2.7
State Tax Receipts	2.6	2.5	2.8	3.0	3.3	3.3	2.7	2.7	3.0
Total	4.7	4.3	4.9	5.3	6.2	6.4	4.9	4.9	5.7

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

GREENLEE COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	9.7	8.9	10.2	11.0	12.8	13.7	10.7	10.6	11.8
Other Travel*	1.8	1.6	2.0	2.1	2.0	2.1	1.7	1.5	1.6
Total	11.5	10.5	12.2	13.1	14.9	15.8	12.4	12.1	13.4
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	4.1	3.3	3.9	4.5	6.2	6.7	4.3	4.1	5.0
Private Home	4.1	4.2	4.7	4.8	4.9	5.1	4.8	4.8	5.0
Campground	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Vacation Home	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	1.1	1.1	1.2	1.2	1.3	1.4	1.2	1.2	1.3
Total	9.7	8.9	10.2	11.0	12.8	13.7	10.7	10.6	11.8
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	1.5	1.1	1.3	1.6	2.3	2.3	1.5	1.4	1.8
Food Service	2.7	2.6	2.9	3.1	3.6	3.9	3.4	3.5	3.9
Food Stores	0.9	0.9	1.0	1.0	1.1	1.2	1.1	1.1	1.2
Local Tran. & Gas	1.8	1.6	2.1	2.2	2.3	2.4	1.7	1.5	1.7
Arts, Ent. & Rec.	0.8	0.7	0.8	0.8	0.9	1.0	0.8	0.8	0.9
Retail Sales	2.1	1.9	2.1	2.3	2.7	2.9	2.2	2.2	2.4
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	9.7	8.9	10.2	11.0	12.8	13.7	10.7	10.6	11.8
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	1.4	1.3	1.4	1.5	1.9	2.0	1.6	1.1	1.3
Arts, Ent. & Rec.	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Retail**	0.6	0.5	0.5	0.5	0.6	0.7	0.6	0.6	0.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total	2.4	2.1	2.3	2.5	3.0	3.1	2.6	2.1	2.4
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	100	90	90	100	110	110	100	60	70
Arts, Ent. & Rec.	10	10	10	10	10	20	10	10	10
Retail**	20	20	20	20	20	30	20	20	20
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	10	0	0	0	0	10	10	10	10
Total	140	130	130	140	150	160	140	110	110
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	0.2	0.2	0.2	0.2	0.3	0.3	0.2	0.2	0.3
State Tax Receipts	0.6	0.5	0.6	0.7	0.7	0.7	0.6	0.6	0.7
Total	0.8	0.7	0.8	0.9	1.0	1.0	0.9	0.8	0.9

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

LA PAZ COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	129.2	123.9	134.6	137.6	139.2	136.0	136.0	136.3	142.2
Other Travel*	4.3	3.9	4.7	4.8	4.7	4.6	3.6	3.1	3.5
Total	133.5	127.8	139.3	142.4	143.9	140.6	139.6	139.4	145.7
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	6.6	3.9	6.9	8.3	10.2	8.8	10.3	11.0	12.9
Private Home	14.5	14.3	16.5	16.4	16.4	15.6	15.6	15.3	16.2
Campground	31.2	30.4	31.9	32.5	31.9	31.4	30.6	30.4	31.3
Vacation Home	16.7	16.3	16.9	17.1	17.3	17.5	17.3	17.6	18.1
Day Travel	60.1	59.0	62.4	63.3	63.5	62.8	62.1	62.0	63.7
Total	129.2	123.9	134.6	137.6	139.2	136.0	136.0	136.3	142.2
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	10.1	8.5	9.6	10.1	10.8	10.6	11.4	11.9	12.7
Food Service	22.5	22.8	24.5	25.3	26.2	25.9	27.4	28.5	30.2
Food Stores	12.4	12.1	13.0	13.2	13.3	13.4	13.8	13.7	13.8
Local Tran. & Gas	18.9	17.1	21.3	22.0	21.5	20.2	16.2	14.0	15.6
Arts, Ent. & Rec.	47.7	45.9	47.7	48.4	48.8	47.8	48.8	49.8	51.1
Retail Sales	17.6	17.5	18.4	18.5	18.6	18.1	18.4	18.4	18.7
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	129.2	123.9	134.6	137.6	139.2	136.0	136.0	136.3	142.2
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	9.8	10.6	12.5	12.5	13.4	13.3	13.6	13.3	14.2
Arts, Ent. & Rec.	14.1	13.6	14.2	14.4	14.8	15.1	15.5	15.9	16.5
Retail**	4.9	4.2	4.4	4.3	4.3	4.4	4.6	4.8	4.9
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Total	28.9	28.5	31.3	31.3	32.6	32.9	33.9	34.1	35.8
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	520	560	650	650	700	690	670	670	680
Arts, Ent. & Rec.	480	450	470	480	500	510	480	490	480
Retail**	210	180	190	180	180	170	180	190	190
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	10	10	10	10	10	10	10	10	10
Total	1,230	1,200	1,320	1,310	1,380	1,380	1,330	1,350	1,350
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	4.0	4.0	4.3	4.4	4.3	4.2	4.4	4.5	5.3
State Tax Receipts	5.5	5.7	6.2	6.3	6.2	5.9	6.1	6.1	6.4
Total	9.5	9.7	10.6	10.7	10.6	10.1	10.5	10.6	11.7

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

MARICOPA COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	8,164	8,106	8,586	8,756	9,051	9,585	10,071	10,383	10,963
Other Travel*	2,571	2,401	2,645	2,838	2,966	3,035	2,925	2,873	3,073
Total	10,734	10,507	11,232	11,594	12,017	12,620	12,995	13,255	14,036
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	4,444	4,269	4,535	4,657	4,839	5,178	5,575	5,803	6,170
Private Home	2,155	2,255	2,370	2,381	2,451	2,568	2,648	2,699	2,821
Campground	240	231	243	245	253	271	267	269	279
Vacation Home	254	257	268	278	284	294	299	308	317
Day Travel	1,069	1,093	1,170	1,195	1,223	1,273	1,281	1,304	1,376
Total	8,164	8,106	8,586	8,756	9,051	9,585	10,071	10,383	10,963
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	1,638	1,372	1,479	1,526	1,600	1,751	1,979	2,066	2,211
Food Service	1,712	1,829	1,917	1,984	2,070	2,200	2,348	2,499	2,663
Food Stores	268	271	289	294	303	323	339	344	351
Local Tran. & Gas	1,037	1,038	1,175	1,204	1,224	1,261	1,165	1,139	1,222
Arts, Ent. & Rec.	1,074	1,083	1,116	1,132	1,156	1,203	1,252	1,305	1,356
Retail Sales	1,154	1,201	1,246	1,262	1,286	1,327	1,371	1,407	1,449
Visitor Air Tran.	1,281	1,311	1,363	1,353	1,411	1,520	1,618	1,623	1,711
Total	8,164	8,106	8,586	8,756	9,051	9,585	10,071	10,383	10,963
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	1,195	1,153	1,214	1,248	1,319	1,395	1,487	1,544	1,652
Arts, Ent. & Rec.	505	510	517	556	585	637	666	701	743
Retail**	212	197	208	206	207	224	241	256	265
Ground Tran.	102	109	116	119	120	129	139	149	157
Visitor Air Tran.	543	564	612	602	602	610	684	693	721
Other Travel*	782	740	792	851	890	889	944	968	1,005
Total	3,339	3,273	3,460	3,582	3,723	3,884	4,162	4,310	4,542
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	41,970	40,040	41,370	41,710	43,650	45,010	46,470	47,530	48,010
Arts, Ent. & Rec.	16,780	15,710	15,960	16,560	17,510	18,710	20,000	20,020	19,980
Retail**	6,480	5,890	5,940	5,910	6,070	6,390	6,750	7,050	7,090
Ground Tran.	2,770	2,780	2,920	2,970	3,040	3,160	3,320	3,600	3,740
Visitor Air Tran.	7,470	6,770	7,040	7,160	7,000	7,300	7,720	7,820	7,780
Other Travel*	13,730	11,860	12,210	13,170	12,890	13,960	14,930	15,250	15,060
Total	89,200	83,060	85,430	87,480	90,160	94,530	99,180	101,270	101,660
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	455	447	472	476	495	516	565	590	699
State Tax Receipts	401	418	461	473	467	463	492	507	546
Total	856	865	933	949	962	979	1,057	1,098	1,245

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

MOHAVE COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	450.5	460.6	466.8	473.6	497.1	494.5	483.6	490.3	541.2
Other Travel*	71.1	69.2	78.3	80.4	83.3	86.3	40.7	38.9	42.3
Total	521.6	529.9	545.1	554.0	580.4	580.8	524.3	529.2	583.6
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	112.4	119.0	119.5	120.0	124.7	132.6	137.2	144.9	162.7
Private Home	153.7	155.7	157.5	160.8	173.5	165.5	155.2	153.8	173.2
Campground	21.2	20.5	22.1	22.6	22.2	21.8	20.8	20.4	21.2
Vacation Home	38.3	37.8	39.5	40.4	40.6	41.3	41.5	42.0	43.1
Day Travel	124.8	127.6	128.2	129.8	136.1	133.2	128.9	129.3	141.2
Total	450.5	460.6	466.8	473.6	497.1	494.5	483.6	490.3	541.2
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	57.8	55.3	56.2	56.5	58.7	64.0	69.3	74.8	82.8
Food Service	118.5	128.8	126.4	129.4	138.7	139.3	142.4	149.3	166.3
Food Stores	42.5	43.1	43.5	44.1	46.7	46.5	46.8	46.8	50.0
Local Tran. & Gas	79.5	75.5	87.1	89.7	92.2	86.8	67.7	58.8	69.4
Arts, Ent. & Rec.	82.3	84.3	81.8	82.0	85.7	84.7	84.8	87.2	94.3
Retail Sales	69.8	73.6	71.7	71.9	75.1	73.2	72.6	73.3	78.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	450.5	460.6	466.8	473.6	497.1	494.5	483.6	490.3	541.2
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	62.6	62.8	64.9	61.3	66.8	71.6	89.8	100.3	112.3
Arts, Ent. & Rec.	40.9	31.8	29.1	32.0	34.5	39.0	39.2	40.6	44.8
Retail**	20.0	18.0	17.7	17.3	18.0	18.2	18.8	19.6	21.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	12.9	12.5	12.8	13.1	14.6	16.1	3.1	4.3	4.2
Total	136.5	125.1	124.6	123.8	133.9	144.9	150.9	164.8	182.6
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	3,190	3,220	3,240	2,950	3,110	3,290	3,940	4,220	4,450
Arts, Ent. & Rec.	2,030	1,630	1,500	1,580	1,590	1,750	1,790	1,700	1,770
Retail**	680	630	610	600	620	610	620	640	680
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	490	430	430	430	430	450	110	150	150
Total	6,400	5,900	5,780	5,560	5,750	6,100	6,450	6,710	7,040
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	16.8	16.9	16.8	16.5	17.5	18.1	19.3	20.6	23.3
State Tax Receipts	21.9	23.2	24.1	24.3	24.4	23.7	24.1	24.8	27.8
Total	38.7	40.1	40.9	40.8	41.9	41.8	43.4	45.5	51.1

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

NAVAJO COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	285.6	254.4	263.8	278.5	280.8	283.0	282.7	288.6	311.9
Other Travel*	22.9	21.0	24.9	25.4	24.8	24.5	19.3	16.9	18.8
Total	308.5	275.4	288.7	303.9	305.7	307.4	302.1	305.5	330.6
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	141.3	114.3	115.2	128.1	130.4	131.3	134.1	139.0	157.4
Private Home	53.9	52.4	57.1	58.5	57.7	58.2	55.8	55.3	57.7
Campground	17.2	16.7	17.6	16.4	16.8	16.2	16.1	16.3	16.8
Vacation Home	45.6	45.2	46.7	47.4	47.9	48.9	48.9	50.0	50.4
Day Travel	27.7	25.8	27.2	28.1	28.1	28.3	27.8	28.0	29.6
Total	285.6	254.4	263.8	278.5	280.8	283.0	282.7	288.6	311.9
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	60.4	50.1	50.5	55.0	56.5	57.0	59.5	63.3	69.7
Food Service	69.3	65.5	66.6	70.7	72.2	74.3	77.6	81.7	88.5
Food Stores	20.2	19.1	20.1	20.4	20.6	21.2	21.8	21.9	22.4
Local Tran. & Gas	39.7	33.9	40.7	42.7	41.7	40.4	32.3	28.2	32.0
Arts, Ent. & Rec.	32.0	29.6	29.6	30.0	30.2	30.3	30.9	31.9	33.2
Retail Sales	64.0	56.3	56.2	59.6	59.7	59.7	60.7	61.7	66.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	285.6	254.4	263.8	278.5	280.8	283.0	282.7	288.6	311.9
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	48.8	48.0	47.6	52.1	53.5	54.5	58.7	61.1	67.2
Arts, Ent. & Rec.	13.3	17.9	18.3	21.7	21.8	22.8	23.3	24.3	25.8
Retail**	12.7	10.1	10.4	10.5	10.4	10.9	11.5	12.1	12.9
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	1.3	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.9
Total	76.1	76.9	77.1	85.2	86.5	89.0	94.3	98.2	106.8
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	2,330	2,250	2,250	2,300	2,330	2,350	2,420	2,450	2,540
Arts, Ent. & Rec.	680	810	810	890	900	940	1,040	1,040	1,050
Retail**	510	410	410	420	410	420	440	460	480
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	70	40	40	40	40	40	40	40	40
Total	3,590	3,520	3,510	3,650	3,690	3,760	3,940	4,000	4,110
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	11.3	10.6	10.7	11.4	10.9	11.1	12.1	12.6	14.0
State Tax Receipts	13.5	13.2	14.1	14.9	14.2	13.8	14.3	14.6	16.0
Total	24.9	23.9	24.8	26.3	25.0	24.9	26.3	27.2	30.0

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

PIMA COUNTY
Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	2,043.2	2,022.0	2,051.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5
Other Travel*	530.0	490.6	544.1	634.8	573.4	575.8	531.6	514.4	557.1
Total	2,573.2	2,512.6	2,595.0	2,764.2	2,713.1	2,784.1	2,771.7	2,697.1	2,910.6
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	903.3	895.2	908.4	945.7	952.7	994.0	1,053.5	1,032.8	1,109.5
Private Home	451.5	451.7	467.0	467.6	460.3	474.4	473.2	469.3	497.7
Campground	36.2	29.3	31.2	32.5	31.9	31.4	30.2	29.6	30.8
Vacation Home	47.0	47.4	49.1	50.3	50.8	51.9	52.2	53.0	54.2
Day Travel	605.1	598.5	595.3	633.3	644.0	656.6	631.0	597.9	661.3
Total	2,043.2	2,022.0	2,051.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	348.9	316.2	320.3	330.0	333.3	349.2	378.5	377.6	401.9
Food Service	475.3	507.9	514.1	541.6	552.2	576.5	610.5	610.0	662.4
Food Stores	132.0	128.8	130.7	137.8	140.3	146.3	146.3	138.9	149.3
Local Tran. & Gas	279.4	278.0	305.8	320.7	318.1	320.6	291.9	264.9	291.2
Arts, Ent. & Rec.	172.7	174.5	175.3	178.4	177.3	181.0	186.2	184.6	193.3
Retail Sales	411.5	413.2	401.2	423.0	428.1	432.8	423.0	401.9	436.3
Visitor Air Tran.	223.3	203.5	203.5	198.0	190.3	201.9	203.6	204.6	219.1
Total	2,043.2	2,022.0	2,051.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	303.8	297.6	309.3	333.8	337.1	360.3	393.0	407.4	448.7
Arts, Ent. & Rec.	76.3	76.8	75.4	75.7	75.3	84.9	87.8	87.8	93.8
Retail**	79.4	72.0	71.7	73.4	73.2	77.5	79.4	78.1	85.2
Ground Tran.	25.2	27.4	28.3	29.5	29.2	30.9	33.4	33.2	37.9
Visitor Air Tran.	11.8	10.9	10.4	9.4	7.5	9.9	10.8	11.9	12.3
Other Travel*	61.0	52.3	54.4	83.5	64.7	67.2	69.2	74.2	77.8
Total	557.5	537.1	549.4	605.4	587.1	630.8	673.6	692.6	755.7
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	12,700	12,420	12,720	13,330	13,340	13,810	14,290	14,630	15,180
Arts, Ent. & Rec.	3,860	4,090	4,070	4,080	4,060	4,350	4,440	4,640	4,670
Retail**	2,880	2,560	2,540	2,520	2,510	2,610	2,610	2,550	2,690
Ground Tran.	690	700	710	740	740	750	800	800	910
Visitor Air Tran.	250	210	200	180	130	170	170	180	170
Other Travel*	1,860	1,450	1,400	2,110	1,820	1,750	1,750	1,900	1,870
Total	22,240	21,440	21,630	22,950	22,600	23,440	24,050	24,700	25,500
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	73.0	72.5	73.4	75.9	75.1	76.9	82.4	82.8	74.1
State Tax Receipts	101.5	106.0	112.6	118.5	112.9	111.0	115.6	114.0	126.7
Total	174.5	178.5	186.0	194.4	187.9	187.9	198.0	196.8	200.8

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

PINAL COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	456.2	508.7	544.1	534.7	531.8	554.5	567.8	571.6	617.4
Other Travel*	70.9	73.3	87.4	90.4	89.0	89.5	72.6	64.2	74.1
Total	527.2	582.0	631.4	625.1	620.7	644.0	640.4	635.8	691.5
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	37.1	34.7	40.0	37.8	33.3	33.4	38.1	38.9	49.0
Private Home	199.9	237.3	252.3	243.2	245.0	260.1	269.2	270.8	291.0
Campground	48.2	46.6	50.2	51.4	50.5	49.6	47.3	46.3	48.1
Vacation Home	67.4	74.8	77.0	79.5	80.5	84.2	86.2	89.4	93.5
Day Travel	103.6	115.4	124.5	122.8	122.4	127.3	127.0	126.2	135.9
Total	456.2	508.7	544.1	534.7	531.8	554.5	567.8	571.6	617.4
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	42.3	40.3	43.0	42.9	41.7	43.0	46.8	48.7	53.9
Food Service	140.1	166.0	173.5	171.1	173.3	184.7	199.0	207.8	226.3
Food Stores	42.3	46.8	49.8	49.0	49.2	52.3	55.2	55.1	57.2
Local Tran. & Gas	73.7	75.6	92.4	92.3	89.4	89.4	73.1	63.4	72.5
Arts, Ent. & Rec.	66.2	73.7	75.5	73.5	73.1	76.3	79.9	81.9	86.7
Retail Sales	91.6	106.2	109.8	105.9	105.0	108.9	113.8	114.6	120.7
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	456.2	508.7	544.1	534.7	531.8	554.5	567.8	571.6	617.4
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	62.8	72.5	75.4	79.4	76.8	78.1	84.8	103.7	115.2
Arts, Ent. & Rec.	34.0	28.9	28.2	31.0	31.1	33.6	35.4	36.6	39.5
Retail**	20.9	21.0	21.9	20.7	20.3	22.0	23.9	24.9	26.4
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	4.0	2.7	2.6	2.6	2.7	2.9	3.0	3.2	3.5
Total	121.8	125.1	128.2	133.7	131.0	136.6	147.1	168.4	184.6
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	2,980	3,030	3,210	3,310	3,510	3,470	3,650	4,340	4,540
Arts, Ent. & Rec.	1,260	1,120	1,210	1,310	1,270	1,300	1,350	1,470	1,500
Retail**	810	770	820	760	760	800	870	880	910
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	200	130	130	120	130	140	140	140	150
Total	5,260	5,050	5,360	5,500	5,660	5,710	6,010	6,840	7,090
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	17.0	19.3	20.1	19.7	19.3	19.7	21.4	22.8	25.3
State Tax Receipts	23.3	27.4	29.6	29.3	28.1	27.8	29.5	30.5	33.3
Total	40.3	46.7	49.6	49.0	47.3	47.6	50.8	53.2	58.5

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

SANTA CRUZ COUNTY Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	272.9	253.6	228.2	260.0	277.7	278.2	257.5	226.7	231.1
Other Travel*	10.1	9.1	10.9	11.2	10.8	10.5	8.3	7.0	8.0
Total	283.0	262.7	239.2	271.2	288.5	288.6	265.8	233.8	239.1
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	39.0	36.2	28.0	31.0	35.1	32.6	39.2	32.8	35.0
Private Home	33.1	34.9	36.4	38.2	38.0	36.0	35.8	33.3	35.7
Campground	1.3	1.2	1.3	1.4	1.3	1.3	1.3	1.2	1.3
Vacation Home	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.4
Day Travel	198.2	180.0	161.2	188.2	201.9	206.9	179.9	158.0	157.8
Total	272.9	253.6	228.2	260.0	277.7	278.2	257.5	226.7	231.1
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	16.9	15.5	11.9	12.8	14.0	13.4	16.4	14.0	15.1
Food Service	41.1	41.2	37.0	41.5	44.8	44.4	45.4	42.0	44.2
Food Stores	92.9	83.8	76.1	88.6	95.3	98.9	88.3	77.6	77.0
Local Tran. & Gas	23.2	20.7	22.3	25.0	25.5	23.9	18.6	14.5	16.1
Arts, Ent. & Rec.	9.3	9.1	8.0	8.5	9.0	8.4	9.4	8.5	8.9
Retail Sales	89.5	83.3	72.9	83.7	89.1	89.1	79.3	70.1	69.8
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	272.9	253.6	228.2	260.0	277.7	278.2	257.5	226.7	231.1
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	21.1	20.8	18.4	19.1	19.8	22.3	27.7	25.3	26.9
Arts, Ent. & Rec.	5.1	4.2	4.1	4.3	4.4	5.2	5.9	5.4	5.7
Retail**	27.3	23.6	20.8	23.1	24.2	25.3	23.6	21.5	21.8
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.7	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4
Total	54.1	48.8	43.6	46.9	48.7	53.3	57.5	52.6	54.8
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	1,000	970	870	900	930	1,040	1,220	1,110	1,110
Arts, Ent. & Rec.	340	290	300	290	330	390	440	400	400
Retail**	900	720	650	710	740	730	680	580	570
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	30	20	20	20	20	20	20	20	20
Total	2,260	2,000	1,840	1,920	2,020	2,180	2,360	2,110	2,100
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	8.4	8.2	7.2	7.9	8.1	8.0	8.2	7.3	7.9
State Tax Receipts	10.6	10.5	9.9	11.1	11.1	10.6	10.4	9.3	9.7
Total	19.1	18.7	17.1	18.9	19.1	18.6	18.5	16.6	17.6

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

YAVAPAI COUNTY

Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	594.6	566.4	596.9	631.9	650.8	680.9	706.6	725.5	800.0
Other Travel*	60.0	53.6	60.6	62.8	64.1	65.3	41.6	37.6	43.0
Total	654.5	620.0	657.5	694.7	714.9	746.2	748.2	763.1	842.9
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	234.4	209.7	221.3	245.6	261.6	282.8	311.4	330.6	384.4
Private Home	77.0	78.6	85.4	87.5	87.8	89.6	87.3	86.3	92.3
Campground	13.0	12.6	13.2	13.8	13.5	14.7	14.6	14.8	15.2
Vacation Home	24.2	23.9	24.7	25.4	25.8	26.7	27.0	27.7	28.5
Day Travel	246.0	241.6	252.2	259.6	262.0	267.1	266.3	266.1	279.6
Total	594.6	566.4	596.9	631.9	650.8	680.9	706.6	725.5	800.0
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	121.3	104.4	109.6	122.7	133.3	147.4	169.7	187.1	217.9
Food Service	113.7	115.8	120.0	127.1	132.4	139.9	149.2	155.7	171.8
Food Stores	41.5	40.7	43.1	44.4	45.3	47.6	49.6	49.4	51.3
Local Tran. & Gas	73.6	66.6	81.0	85.7	84.9	84.4	68.5	59.3	68.5
Arts, Ent. & Rec.	166.3	160.5	162.9	168.3	170.9	176.0	182.0	185.8	197.2
Retail Sales	77.8	77.6	79.3	81.8	83.0	84.7	87.0	87.5	92.1
Visitor Air Tran.	0.4	0.8	1.0	1.8	1.0	0.8	0.7	0.8	1.3
Total	594.6	566.4	596.9	631.9	650.8	680.9	706.6	725.5	800.0
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	83.5	73.5	77.7	85.8	93.1	100.6	114.9	125.1	141.4
Arts, Ent. & Rec.	68.8	67.9	63.0	64.4	63.4	67.2	69.7	71.7	77.2
Retail**	19.0	16.4	17.0	17.1	17.1	18.2	19.6	20.3	21.6
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.3	0.3	0.3	0.4	0.3	0.3	0.5	0.7	0.6
Other Travel*	8.3	6.1	5.7	5.9	6.7	7.4	2.4	2.9	3.2
Total	179.8	164.3	163.8	173.5	180.5	193.8	207.1	220.7	244.0
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	3,520	3,040	3,180	3,430	3,590	3,810	4,110	4,370	4,640
Arts, Ent. & Rec.	3,840	3,540	3,410	3,430	3,460	3,790	3,840	3,820	3,880
Retail**	770	650	670	660	660	690	720	730	750
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	10	10	10	10	10	10	10
Other Travel*	310	240	210	200	190	200	100	110	110
Total	8,450	7,480	7,470	7,730	7,910	8,500	8,790	9,040	9,400
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	25.5	24.4	24.9	26.2	28.1	30.0	33.2	35.5	40.9
State Tax Receipts	28.0	28.0	30.0	31.6	30.9	31.1	33.1	34.2	38.0
Total	53.4	52.3	54.9	57.8	59.0	61.1	66.3	69.6	78.9

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

YUMA COUNTY Travel Impacts, 2008-2017p

Total Direct Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Destination Spending	569.9	553.0	589.5	594.5	575.1	590.4	574.7	564.1	588.2
Other Travel*	54.7	52.6	60.9	62.3	60.2	60.8	48.6	42.0	47.1
Total	624.6	605.7	650.4	656.7	635.3	651.2	623.3	606.1	635.3
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Hotel, Motel, STVR***	140.2	130.3	151.2	149.2	131.9	137.7	145.8	150.6	165.5
Private Home	78.6	79.9	90.6	87.7	86.7	90.8	88.6	87.2	91.6
Campground	72.5	74.8	79.2	72.9	68.0	66.9	65.3	64.9	66.8
Vacation Home	43.7	44.5	47.4	48.2	48.5	49.5	49.6	50.4	51.7
Day Travel	234.9	223.5	221.1	236.3	240.0	245.4	225.4	211.0	212.7
Total	569.9	553.0	589.5	594.5	575.1	590.4	574.7	564.1	588.2
Visitor Spending By Commodity Purchased (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accommodations	66.8	60.1	67.5	65.2	59.0	62.1	67.2	70.4	77.1
Food Service	103.8	107.3	115.1	116.5	113.8	119.2	122.4	126.0	133.4
Food Stores	72.9	69.1	69.2	73.5	75.1	78.4	74.3	69.6	69.0
Local Tran. & Gas	68.4	63.2	79.2	79.4	74.2	73.2	57.5	49.2	55.0
Arts, Ent. & Rec.	121.1	120.9	129.6	124.4	115.6	117.6	120.6	123.7	128.5
Retail Sales	124.4	120.1	116.4	123.7	124.9	126.4	117.6	110.9	110.4
Visitor Air Tran.	12.4	12.3	12.3	11.7	12.5	13.6	15.0	14.4	14.9
Total	569.9	553.0	589.5	594.5	575.1	590.4	574.7	564.1	588.2
Industry Earnings Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	58.0	62.4	63.0	63.7	63.7	64.6	68.7	73.0	79.0
Arts, Ent. & Rec.	50.7	50.0	50.5	52.0	45.5	48.5	49.9	51.5	54.4
Retail**	31.4	27.4	27.1	27.7	27.5	29.1	28.5	27.9	28.2
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.3	0.7	0.8	0.3	0.3	0.3	0.4	0.5	0.5
Other Travel*	3.4	2.8	3.0	2.3	2.5	2.6	2.0	2.2	2.3
Total	143.7	143.2	144.4	145.9	139.4	145.2	149.5	155.1	164.4
Industry Employment Generated by Travel Spending (Jobs)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Accom. & Food Serv.	2,790	2,850	2,920	2,840	2,850	2,830	2,940	3,060	3,120
Arts, Ent. & Rec.	2,060	2,140	2,200	2,490	2,160	2,190	2,340	2,360	2,350
Retail**	1,110	960	930	920	900	930	890	850	840
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	20	10	10	10	10	10	10
Other Travel*	130	100	100	90	90	90	80	80	80
Total	6,110	6,070	6,170	6,340	6,010	6,050	6,260	6,370	6,400
Tax Receipts Generated by Travel Spending (\$Million)									
	2008	2010	2011	2012	2013	2014	2015	2016	2017
Local Tax Receipts	21.4	21.3	22.0	21.9	20.8	21.1	21.6	21.9	22.6
State Tax Receipts	25.6	26.7	28.9	29.1	27.0	26.3	26.5	26.4	28.2
Total	47.0	47.9	50.9	50.9	47.7	47.4	48.1	48.3	50.8

Details may not add to total due to rounding.

*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

**Retail includes gasoline.

***STVR stands for Short Term Vacation Rental
Federal tax receipts not included.

APPENDICES

Appendix A	2017 Travel Impact Estimates
Appendix B	Key Terms and Definitions
Appendix C	Regional Travel Impact Model
Appendix D	Travel Industry Accounts
Appendix E	Arizona Earnings and Employment by Industry Sector
Appendix F	Industry Groups

2017 TRAVEL IMPACT ESTIMATES

This appendix provides a brief overview of the methodology, terminology and limitations of the travel impact and visitor volume estimates.

DIRECT IMPACTS

The estimates of the direct impacts associated with traveler spending in Arizona were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts of the Arizona travel industry were gathered from various local, state and federal sources.

Travel impacts consist of estimates of travel spending and the employment, earnings, and state and local taxes generated by this spending. These estimates are also broken out by type of traveler accommodation and by the type of business in which the expenditures occur.

PRELIMINARY ESTIMATES

Preliminary estimates for 2017 were prepared at the state, regional and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2017 becomes available.

TRANSPORTATION IMPACTS

The treatment of ground transportation expenditures depends upon the level of geography (county, region or state). County and regional level estimates of destination spending include only a portion of ground transportation expenditures because some county and regional transportation expenditures are for travel to other Arizona destinations. These expenditures are allocated to "other travel." State level estimates include all in-state expenditures for ground transportation.

SECONDARY (INDIRECT AND INDUCED) IMPACTS

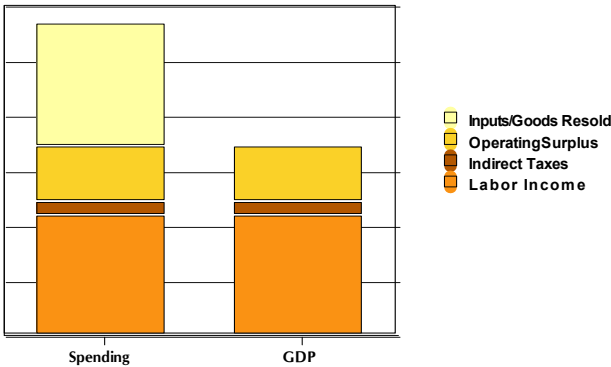
Direct impacts are reported for all counties within Arizona. Secondary employment and earnings impacts over and above direct impacts are reported at the state level only for the year 2017. These indirect and induced impacts are generated from the direct impacts produced by the RTIM, discussed above, and an input-output model of the Arizona economy prepared by the IMPLAN Group, Inc. Indirect impacts represent the purchases of goods and services from other firms by businesses that directly receive expenditures from travelers. Hotels, for example, purchase maintenance services from independent contractors. Induced impacts represent the purchase of goods and services by employees whose earnings are in part derived from travel expenditures. The sum of the direct,

indirect and induced impacts equals the total impact of all spending by visitors in the state. The "multiplier" refers to the ratio of the total impacts to the direct impacts for employment or earnings.

GROSS DOMESTIC PRODUCT

An estimate of the Gross Domestic Product (GDP) of the Arizona travel industry based on the RTIM direct travel impacts is also provided in this report. The GDP of an industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always less than output or sales because GDP measures only the "value" added of an industry and does not include the cost of the inputs that are also necessary to produce a good or service. GDP is a useful concept because it permits comparisons of the economic contributions of different industries. The relationship between spending and gross domestic product is illustrated in the figure below. Examples of inputs are the food or accounting services that restaurants purchase from suppliers. "Goods resold" are the commodities that retail establishments purchase from manufacturers or wholesale trade businesses and resell with a markup. These inputs or goods are not counted as the GDP of the restaurant or retail industry because their value was created in other industries (agriculture, accounting, manufacturing).

Relationship Between Spending and Gross Domestic Product



It is for this reason that "travel spending" - as measured from surveys of visitors - is not the best measure of the travel industry's real economic contribution. This is because some visitor spending is actually counted as the GDP of other industries (e.g., agriculture, accounting, manufacturing). Furthermore, these other industries may or may not be located within the geographic area of interest. If the farm were located within the region of interest, then the GDP of the local farm

would be included as an indirect or secondary effect. If no (e.g., a manufacturing firm in another state or country), then that portion of GDP is not counted. The preceding graph also shows the three main components of GDP. For most industries, labor income (essentially equivalent to earnings in this report) is the primary component of GDP. This is true of the travel industry. A second component is the tax payments that businesses make to government, such as sales, excise and property taxes. In the case of excise taxes, businesses are essentially a collection agency for the government. The final component, operating surplus, represents the income and payments (e.g., dividends, interest) to other stakeholders of the firm. The concept of GDP also illustrates that with small geographic units of analysis (e.g., counties), earnings, employment, and tax revenues are the best measures of the economic value of the travel industry to the local economy. Small area measures of GDP are less reliable and much of the operating surplus may leak out of the local economy anyway. Indirect effects are also generally less in smaller economies.

INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of several issues regarding the interpretation of the impact estimates contained herein:

- The estimates contained in this report are based on the most current data available and supersede all previous estimates of travel impacts.
- The estimates in this report are expressed in *current* dollars unless otherwise noted.
- The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.
- In general, estimates of small geographic areas (e.g., rural counties) are less reliable than estimates for regions or metropolitan counties. Trend analysis and comparisons of counties with relatively low levels of travel related economic activity should therefore be interpreted cautiously.
- The estimates of travel impacts published in this report will necessarily differ somewhat from estimates generated from different models, methodologies and data sources. Nonetheless, it should be emphasized that all credible estimates of direct travel impacts at the state level, including those of Dean Runyan Associates, are of similar magnitude.

DEFINITION OF TERMS

Commodity: A classification of a product or service, such as lodging or food service. An establishment or industry may produce more than one commodity.

Direct Impacts: Employment, earnings and tax receipts *directly* generated by travel spending, as distinguished from secondary and total impacts.

Earnings: Earnings include wage and salary disbursements, other earned income or benefits, and proprietor income. Only the earnings attributable to travel expenditures are included.

Employment: Industry employment (jobs) associated with travel-generated *earnings*. Includes both full-time and part-time positions, and salaried or self-employed individuals. Employment is reported as an average for a time period, typically annual. (Unless otherwise noted, the employment estimates refer to establishment or industry employment at place of work, not the employment status or residence of the individual.)

Federal Taxes: Federal taxes include the motor fuel excise tax, airline ticket taxes, and personal income and payroll taxes.

Industry: A classification of business or government establishments based on their primary technological process. (See NAICS Appendix table.)

Local Taxes: Lodging taxes imposed by cities, counties and other regional tax jurisdictions in Arizona. These taxes are levied on sales to visitors and the spending of employees attributable to travel industry earnings. Passenger Facility Charges attributable to visitors (a fee imposed on airline tickets) are included in counties with airports. Property tax payments attributable to travel industry businesses and employees are also included.

Other spending: Other spending includes spending by residents on ground and air transportation for travel to other destinations, spending on travel arrangement services, and convention/ trade shows.

Private Home: Unpaid overnight accommodations of friends and relatives.

Receipts: Travel expenditures less the sales and excise taxes paid by the consumer.

State Taxes: Lodging taxes, motor fuel, and business and personal income taxes imposed by the state of Arizona. These taxes are levied on sales to visitors and the spending of employees attributable to travel industry earnings.

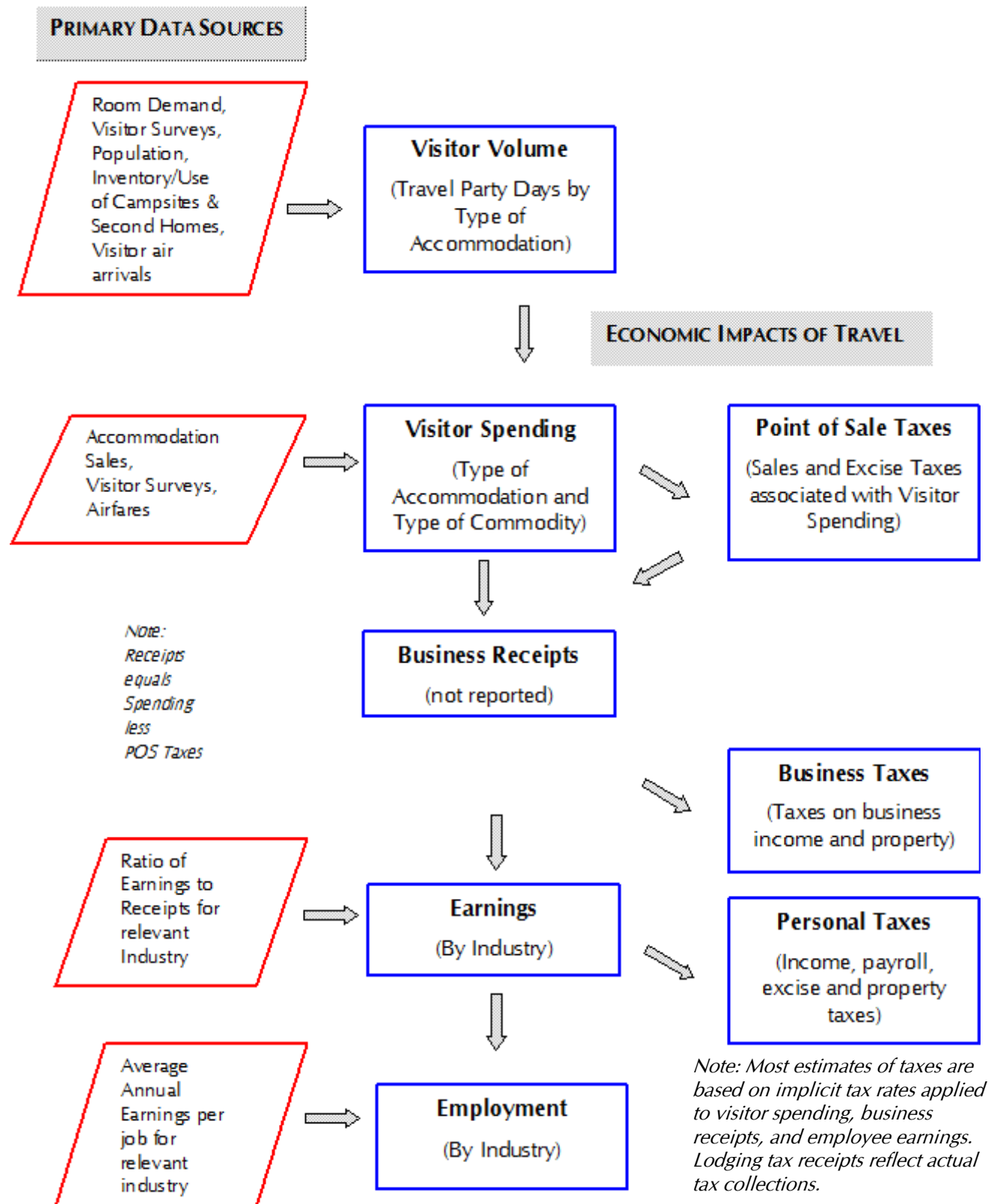
STVR: Acronym for Short Term Vacation Rentals. STVR includes lodging using "shared economy" services.

Total Impacts: The sum of *Direct* and *Secondary* impacts.

Travel spending: The sum of visitor and other spending related to travel.

Visitor spending: All spending on goods & services by visitors at the destination. Also referred to as destination spending.

REGIONAL TRAVEL IMPACT MODEL



TRAVEL INDUSTRY ACCOUNTS: A COMPARISON OF THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS

An economic account is a method for displaying inter-related information about a set of economic activities. A travel industry account is a method to report different types of related information about the purchase of goods and services by visitors. The Bureau of Economic Analysis (BEA), which now provides annual and quarterly estimates of travel and tourism at the national level, describes a Travel and Tourism Satellite Account (TTSA) as “present(ing) a rearrangement of information from the National Income and Product Accounts, from the industry accounts, and from other sources so that travel and tourism activities can be analyzed more completely than is possible in the structure of the traditional national economic accounts.”^[1] Similarly, the RTIM has been developed by Dean Runyan Associates to estimate travel spending, earnings, employment, and tax receipts at the state, county, and regional levels. These initial findings can, in turn, be used as input data for deriving estimates of other economic measures, such as value-added and indirect effects.

This appendix provides an overview of the Regional Travel Impact Model (RTIM) and travel and tourism satellite accounts (TTSA). Although there is no single or absolute form of a TTSA, the one developed by the Bureau of Economic Analysis (BEA) will be the basis of the analysis here. The definitions, framework, and estimating methods used for the U.S. BEA TTSA follow, as closely as is practicable, the guidelines for similar travel satellite accounts that were developed by the World Tourism Organization (WTO) and the Organization for Economic Co-operation and Development (OECD).

The primary focus is on the direct impacts of visitor spending. Visitors are defined as persons that stay overnight away from home, or travel more than fifty miles one-way on a non-routine trip. Only the expenditures related to specific trips are counted as visitor spending. Other travel related expenditures such as the consumption of durable goods (e.g., recreational vehicles or sporting equipment) or the purchase of vacation homes are not considered.

While such a definition of the travel industry (i.e., the trip related expenditures of visitors) is conservative, it is also in keeping with the notion of the travel industry as being an export-oriented industry for specific local communities. That is, visitors are important to regions because they inject money into the local economy. This focus on the export-oriented nature of the travel industry for local communities becomes blurred if the industry is defined so as to include non-trip related expenditures.

[1] Peter D. Kuhbach, Mark A. Planting, and Erich H. Strassner, “U.S. Travel and Tourism Satellite Accounts for 1998-2003,” *Survey of Current Business* 84 (September 2004): 43-59.

PRIMARY CONCEPTS, CATEGORIES & DATA REQUIREMENTS

There are three primary types of information that are measured and/or estimated in a travel industry account. The first is a measure of the **travel industry** in terms of both the characteristics of the business firms that sell travel goods and services and the characteristics of consumers that purchase travel industry goods and services. The second is a measure of the **demand segments** that consume travel industry goods and services. For example, the distinction between business and leisure travel is a measure of demand segments. The third is a measure of the **components of economic output** associated with the travel industry. The employee earnings generated by visitor spending is one such component. Travel-generated tax receipts are another. These three categories of information represent different aspects of the accounting ledger - they represent different ways of viewing or analyzing the travel industry.

The bulk of this paper will discuss these three types of information in terms of their conceptual foundations, the data requirements, and some of the more salient issues that users of this information should be aware of. There will also be some discussion of **indirect and induced effects** in that these effects can be reasonably estimated from the direct travel industry accounts. These secondary (versus direct) effects describe the relationship of the travel industry to other sectors of the larger economy.

The intent of this discussion will be to provide a general overview of the process of constructing travel industry accounts and the underlying similarity between the RTIM and a TTSA. More technical issues are generally placed in footnotes.

TRAVEL INDUSTRY

Defining the travel industry is probably the most critical and data intensive effort involved in developing a travel industry account. It is an exercise in matching supply (sellers of goods and services) with demand (the travelers that purchase those particular goods and services). It is complicated by the fact that no single industrial classification scheme provides a valid measure of the travel industry.[2] There are only three significant industrial classifications (Accommodations [NAICS 721], Scheduled Passenger Air Transportation [NAICS 481111] and Travel Arrangement and Reservation Services [NAICS 5615]) that *primarily* sell travel industry goods and services.[3] Firms in other industries (retail, recreation, transportation) provide goods and services to both travelers and other types of consumers.

Because of this, most satellite accounts, as well as the RTIM, incorporate at least some information about the expenditures of visitors in order to define the supply of visitor industry

[2]The North American Industrial Classification System (NAICS) is the current standard in the United States.

[3]Even these industries are not purely travel. For example, the accommodations industry provides services to local residents (food service and meeting rooms). Passenger airlines also ship cargo on the same planes that carry passengers. Fortunately, it is usually possible to make adjustments for these non-travel components through the use of additional data.

firms. For example, if there is an estimate of visitor-days and an estimate of how much the average visitor spends on food services per day, then an estimate of visitor spending on food services can be calculated. In most cases, this will be only a fraction of all food service sales in that residents are a larger market for most restaurants.[4] The industry sectors that are usually matched to visitor spending in this way are: accommodations (NAICS 721), food service (722), arts, entertainment and recreation (71), and retail trade (44-45). A portion of transportation business is also part of the travel industry for obvious reasons.

In the case of the transportation sector, the definition and measurement of the travel industry component is more complicated because most transportation spending by visitors involves travel to and from the destination, rather than travel at or within the destination market. This is not an issue if the geographic scope of the travel industry market includes the origin and destination of travel. National travel industry accounts thus include all domestic passenger air transportation in the travel industry. The issue is more complicated at the state or regional level, however.

Suppose, for example, that the focus of a travel industry account is the state of Arizona. How should the purchase of a round trip airline ticket by a Chicago resident traveling to Phoenix be treated in that only some of the economic impact of this spending will occur in Arizona? A reasonable approach would be to allocate only a portion of this spending (and related payroll, taxes, etc.) to Arizona and ignore the remainder for the purpose of creating a travel industry account for Arizona. However, if this procedure were followed for every state, the sum of the state accounts would be less than the national travel account. The state accounts would be additive if outbound air travel from each state were included. However, this is methodologically inconsistent with the construction of a national account, which does not include outbound travel as a component of domestic tourism demand. The approach used in the RTIM is to make a distinction between the *visitor industry*, that includes only visitor demand, and the *travel industry*, which includes visitor demand and that portion of outbound travel that can be attributed to the resident economy. For example, the passenger air transportation employment in Arizona can be divided between three groups of travelers: inbound, outbound, and pass-through. Only that employment attributable to inbound travel is part of the Arizona *visitor industry*. Employment attributable to outbound and pass-through travelers is included with the larger *travel industry*. [5]

[4]The proportion can vary enormously among regions and localities, however. In many popular visitor destinations, the primary market for food service will be visitors. It should also be noted that even with reliable visitor survey data, there is still the issue of how to translate spending on food service *commodities* to the supply of food service by *industry*. As indicated in the footnote above, food service is also supplied by the accommodation industry.

[5]The same issue arises with travel agencies and reservation services (NAICS 5615). Most of these services are probably related to outbound travel and are treated as such in the RTIM.

The following two tables display the specific industries that are included in the travel industry for the BEA’s national TTSA and the RTIM. Although not identical, the industries are equivalent with only a few exceptions.[6]

**Bureau of Economic Analysis Tourism Industries
Distribution of Travel-Generated Compensation
in United States, 2007**

Accommodation & Food Services	38.1%
Traveler accommodations	21.5%
Food services and drinking places	16.6%
Transportation	23.3%
Air transportation	15.4%
Rail transportation	0.4%
Water transportation	1.2%
Interurban bus transportation	0.3%
Interurban charter bus transportation	0.2%
Urban transit systems & other tran.	1.7%
Taxi service	1.0%
Automotive equipment rental & leasing	2.0%
Automotive repair services	0.8%
Parking lots and garages	0.2%
Toll highways	0.1%
Recreation	11.2%
Scenic and sightseeing transportation	0.4%
Motion pictures and performing arts	1.1%
Spectator sports	2.3%
Participant sports	2.4%
Gambling	3.0%
All other recreation and entertainment	2.0%
Retail & Nondurable Goods Production	16.2%
Petroleum refineries	0.6%
Industries producing nondurable PCE commodities, excluding petroleum refineries	4.4%
Wholesale trade & tran. services	4.2%
Gasoline service stations	1.3%
Retail trade services, excluding gasoline service stations	5.8%
Travel Arrangement	7.3%
All other industries	2.2%
Total Tourism Compensation	100.0%

Source: Adapted from Eric S. Griffith and Steven L. Zemanek, "U.S. Travel and Tourism Satellite Accounts for 2005-2008," Survey of Current Business (June 2009): 37, table 6.

[6]The major exception is that the BEA includes the production of consumer non-durables that are sold through retail outlets. This is not a major component and would be even less so at the level of the state.

RTIM Travel Impact Industries Matched to NAICS

Travel Impact Industry	NAICS Industry (code)
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and rural bus transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Administrative/Support Services	Travel Arrangement and Reservation Services (5615) Convention and Trade Show Organizers (56192)

Source: Dean Runyan Associates

DEMAND SEGMENTS

The distinction between inbound and outbound travel has already been discussed in the previous section and in terms of the concepts of the *visitor industry* and the *travel industry*. Three other types of demand segments that are related exclusively to the *visitor industry* will be discussed here. The first two demand categories are reported by the BEA in their national TTSA. They are: ***leisure versus business travel***, and ***resident versus non-resident travel***. The third demand category is typically reported in the RTIM: ***type of traveler accommodation***. These three demand categories will be discussed in turn.

The distinction between ***leisure versus business travel*** is useful for several reasons. Economists like to distinguish between personal consumption expenditures on the one hand and business expenditures on the other. Indeed, this distinction is central for the National Income and Product Accounts (NIPAs). Those in the travel industry are more likely to be interested in this distinction because leisure travelers represent a more “marketable” segment because their travel choices are less determined by economic and business factors. Furthermore, business and leisure travelers tend to have different spending profiles. The availability of this information in either a state or regional TTSA or RTIM is essentially dependent on the availability of survey data (as it is at the national level). It should be noted, however, that such estimates are considerably less reliable for smaller geographic areas because of the limitations of survey data. Even at the state level, year-to-year changes in the composition of this demand segment should be interpreted in conjunction with other data.

The distinction between ***resident versus non-resident travel*** is fundamental to a national TTSA because it mirrors the distinction between the domestic economy and international transactions. Non-resident travel in the United States is considered an export in the official international transaction accounts.[7] The distinction is obviously also important because it is based on different political, legal, and currency regimes - factors that in themselves influence travel behavior. At the level of the state or region, the distinction between resident and nonresident travel is less important, although it is often reported.[8] There are at least two reasons why this distinction is less useful at state and regional levels.

First, there is considerably less of an economic rationale for distinguishing resident and non-resident travel at the level of the state, or any other political jurisdiction within the United States, than there is at the national level. States do not maintain interstate trade balance sheets that chart the flow of goods and services across state boundaries. From an economic point of view, the administration of the tax system is the primary, if only, reason for this distinction. In the case of travel and tourism, the evaluation of the tax impacts of resident versus nonresident travel might also be important.[9]

[7]Conversely, the spending of U.S. visitors in other countries is treated as an import in the international transaction accounts.

[8]The issues discussed with regard to the reliability of survey data for leisure versus business travel also applies to this category

[9]Nonresident visitors who pay taxes in their destination state represent an unambiguous gain for the state. This effect is less clear for resident travelers within the state.

Second, travel is behaviorally defined by length of distance from home (usually at least 50 miles one-way), trip purpose (non-routine), and/or the use of an overnight accommodation away from home. Rarely is domestic travel defined by virtue of crossing a geographic boundary.[10] The operators of tourist attractions in local communities are generally less interested in the origin of visitors than in the revenue that they generate for their businesses. In terms of the economic impacts at the *loca*/level, the distinction between in-state residents, out-of-state residents and international visitors may not be relevant other than for the purpose of marketing. However, other geographic characteristics of the visitor (e.g., distance traveled, the specific area of origin) are generally more useful measures of the visitor market than whether the visitor is a resident or nonresident.

Finally, the distinction among different **types of traveler accommodations** is generally reported in the RTIM. Typically, these categories are:

- Visitors who stay in hotels, motels, B&Bs., and similar lodging facilities
- Visitors who stay at campsites
- Visitors who stay in the private homes of friends or relatives
- Visitors who stay in vacation or second homes
- Visitors who do not stay in overnight accommodations on their trip away from home (day visitors).

These distinctions can be useful because estimates of economic impacts are often used for different purposes. The total of all accommodation types, of course, is an estimate of the total magnitude of the visitor industry. Visitors who stay in commercial lodging such as hotels and motels are most likely to have the greatest economic impact on a person-day basis. These visitors are also more likely to be influenced by marketing efforts. In urban areas, a large proportion will represent business travel. In other words, the type of accommodation category can be used in conjunction with other types of data to analyze the market characteristics of visitors.

[10]In essence, state level travel impact estimates really represent an aggregation of smaller geographic units, such as counties or regions. Populous states with large landmasses (e.g., California or Texas) will have a higher proportion of resident travel than small states (e.g., Rhode Island or Delaware).

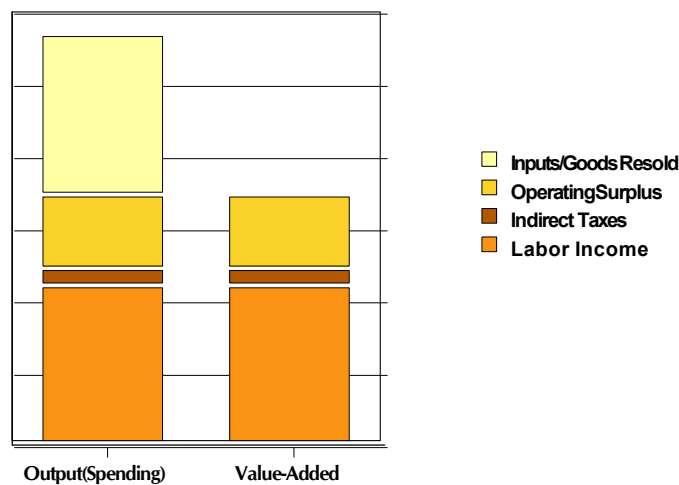
COMPONENTS OF INDUSTRY OUTPUT

Because both the RTIM and the TTSA are empirically linked to NAICS industry accounts, it is possible to provide estimates of different components of economic output. The major economic components most often estimated are.[11]

- Travel spending (Gross Output)
- Value-added (Gross Product)
- Earnings (labor income)
- Indirect business taxes (sales, excise, property taxes & fees).

The relationship of these components is shown below. As indicated, the value-added of a particular industry (the bar on the right) is equal to gross output (travel spending) minus the intermediate inputs used by travel industry businesses to produce the good or service. Restaurants, for example, prepare and serve the food products that are purchased from suppliers. Airlines purchase or lease airplanes from other firms. These intermediate inputs are not counted as part of the value-added of the travel industry. They are counted as value-added in other industries (e.g., agriculture, aerospace manufacturing).

Components of Industry Output



The distinction between gross output and value-added is probably even more important at the state or regional level. This is because the intermediate inputs that are purchased from other industries are even more likely to be purchased from businesses located in different regions or states. For example, the economic impact of air passenger travel in the state of

[11] There are some small differences between the BEA TTSA and the RTIM in what these components include. The BEA allocates proprietor income to Operating Surplus, the RTIM allocates it to Labor Income. The RTIM does not have an estimate of property taxes in indirect taxes. Overall, property taxes on businesses are a relatively small proportion of indirect taxes.

Hawaii should not include the purchase of airplanes manufactured in other parts of the world. Travel industry value-added is a more meaningful measure of the true economic impact of visitor spending in Hawaii because a portion of the economic impact of visitor spending in the state will actually occur elsewhere.[12] Value-added can also be viewed in terms of the distribution or payout of industry receipts, exclusive of those paid to other firms for intermediate inputs. Some of the receipts are distributed to labor as wages, benefits, and proprietor income. Some receipts are paid to government as indirect taxes. These taxes are called “indirect” because most of them are actually paid by consumers in the form of sales or excise taxes.[13] The remainder leaves gross operating surplus. Out of gross operating surplus various payments are made in the form of dividends, interest, and other payments, or retained by the firm. The sum of these three broad categories of payments is equal to travel industry value-added. To summarize:

Value-added = Spending *less* intermediate goods & services, or

Value-added = Labor Income *plus* indirect business taxes *plus* gross operating surplus.

The RTIM is similar to the TTSA in that it also provides estimates of these components of economic output. Travel spending, earnings, and tax impacts are generally provided at the state or regional level. Value-added is generally reported at the state-level only (sometimes referred to as Travel Industry Gross State Product). At the level of the state, travel industry value-added or GSP is an important measure – more economically meaningful than travel spending.[14] For smaller geographic areas, however, the rationale for reporting value-added is less clear. First, there are real data limitations and data costs in deriving these estimates. Second, ***the most important components of value added for the travel industry are earnings and tax receipts***. Because the travel industry is relatively labor intensive and because a large proportion of travel industry goods and services are subject to excise and sales taxes, these two components of value-added (labor income and indirect taxes) are relatively high for the travel industry. The local effects of gross operating surplus are generally less important and certainly much more difficult to assess than are earnings and tax impacts. The relevance of earnings and tax receipts is also in keeping the export-oriented emphasis of the travel industry: earnings and tax receipts are more likely to stay in the local economy than is operating surplus.

[12]It should also be noted the value of the intermediate inputs used by travel industry firms will not necessarily disappear if the travel industry stops buying them. Aerospace firms will shift their production to other users (e.g., military). Agriculture will seek new markets for their products.

[13]Other taxes included here are property taxes, business franchise taxes, and other fees. Income taxes are not included, because they are paid out of operating surplus.

[14]It is also possible to compare different industries with respect to their value-added. It is more difficult and less useful to compare industries on the basis of sales.

INDIRECT, INDUCED AND SECONDARY EFFECTS

To this point, the discussion of travel industry accounts has referred only to the direct output components. That is, the ripple effects of the re-spending of travel industry receipts throughout the larger economy have not been analyzed. The structure of both the TTSA and the RTIM permit such analysis.

- **Indirect** effects refer to the intermediate inputs used to produce the final product or service, providing that those inputs are themselves produced within the designated geographic area.
- **Induced** effects refer to the purchase of goods and services by *employees* that are attributable to direct and indirect impacts. These induced impacts are derived from economic data that describe the purchasing patterns of households. For example, employees of all the designated export-oriented industries will spend their income on food, household durables, health care, and so on.
- The sum of indirect and induced impacts is sometimes referred to as the **secondary** effect. These secondary impacts may be as great or greater than the direct impact alone.
- The ratio of the total effects (direct plus either indirect, induced, or secondary) to the direct effects is the **multiplier**.

The BEA reports the **indirect** components of economic output. This is equivalent to domestic travel spending less the goods and services imported from abroad to meet domestic demand. For travel, these imports would include souvenirs manufactured in China and petroleum extracted in Saudi Arabia. The indirect output multiplier for 2002 was 1.76. The ratio of domestic travel spending to travel industry value-added was 1.88. The difference reflects the intermediate inputs for travel imported from abroad.

At the state level, these indirect output multipliers are typically lower because relatively more of the intermediate inputs are purchased from outside of the state. At the county or metropolitan level, the multipliers are generally even lower for the same reason. Furthermore, the estimates are usually less reliable because of the data limitations of the regional input-output model used to estimate the indirect effects.

The BEA does not report **induced** effects - the effect of household spending of the direct and indirect labor income. Typically, these induced effects will be larger than the indirect effects at the state or regional level, in part because they are based on both the direct and indirect components.¹⁵ As with indirect effects, the induced effects will also tend to be lower for smaller economic areas and the reliability of the estimates will be less.

[15]The induced effects can be estimated with the Implan model maintained by the Minnesota Implan Group.

Secondary effects should be interpreted cautiously. These effects describe the relationship of economic transactions at a point in time. These relationships will not necessarily remain constant with a change in direct economic output. This is because all economic resources have alternative uses. Because of this, it is often difficult to determine the effect of an increase or decrease in visitor spending on the larger economic system over time.

THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS COMPARED

This appendix has provided an overview of Dean Runyan Associates RTIM and the Bureau of Economic Analysis' domestic TTSA. These travel industry accounts are similar in terms of how they define the travel industry and the measures of the industry that are reported. The differences stem largely from their different levels of analysis - the BEA provides estimates at the national level only, while the RTIM's are typically constructed on a state or regional level. Because of this geographic focus, the RTIM provides a distinction between the visitor industry and the travel industry. The RTIM also provides measures of all of the components of economic output and secondary effects at the state or large region level. At smaller units of analysis, however, the emphasis is on earnings and tax receipts generated by travel spending as these are the most reliable and meaningful measures of the economic impact of travel at the local level.

Arizona Earnings and Employment by Industry Sector, 2016

Industry Sector	Earnings (\$Billion)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	18.7	9.9%	246	6.8%
Agriculture, Forestry, Fishing and related	2.0	1.1%	50	1.4%
Mining	1.6	0.8%	22	0.6%
Manufacturing	15.1	8.0%	174	4.8%
**Travel	6.5	3.4%	184	5.1%
Primarily Non Export-Oriented	94.2	49.8%	1,904	52.3%
Construction	10.6	5.6%	186	5.1%
Utilities	1.8	0.9%	13	0.4%
Wholesale trade	9.4	5.0%	118	3.2%
Retail trade	13.9	7.4%	399	11.0%
Real estate and rental and leasing	5.2	2.8%	211	5.8%
Management of companies and enterprises	3.3	1.7%	39	1.1%
Administrative and waste services	11.7	6.2%	298	8.2%
Other services, except public administration	6.9	3.7%	194	5.3%
Government and government enterprises	31.3	16.6%	446	12.2%
Mixed	76.1	40.3%	1,491	40.9%
Transportation and warehousing	6.0	3.2%	120	3.3%
Information	4.5	2.4%	56	1.5%
Finance and insurance	14.1	7.5%	230	6.3%
Professional and technical services	15.0	7.9%	235	6.4%
Educational services	3.1	1.7%	80	2.2%
Health care and social assistance	23.7	12.5%	405	11.1%
Leisure and Hospitality	9.7	5.2%	366	10.0%
Arizona Total**	189.0	100.0%	3,642	100.0%

**Travel is not included in the sub and grand totals because it is also represented in other sectors (primarily leisure and hospitality, transportation, and retail trade).

Industry Groups

Accommodation & Food Services

- Food services and drinking places
- Hotels and motels, including casino hotels
- Other accommodations

Arts, Entertainment & Recreation

- Amusement parks, arcades, and gambling industries
- Bowling centers
- Fitness and recreational sports centers
- Independent artists, writers, and performers
- Museums, historical sites, zoos, and parks
- Other amusement and recreation industries
- Performing arts companies
- Promoters of performing arts and sports and agents for public figures
- Spectator sports companies

Construction

- Construction of new nonresidential commercial and health care structures
- Construction of new nonresidential manufacturing structures
- Construction of new residential permanent site single- and multi-family structures
- Construction of other new nonresidential structures
- Construction of other new residential structures
- Maintenance and repair construction of nonresidential structures
- Maintenance and repair construction of residential structures

Education and Health Services

- Child day care services
- Community food, housing, and other relief services, including rehabilitation services
- Home health care services
- Individual and family services
- Medical and diagnostic labs and outpatient and other ambulatory care services
- Nursing and residential care facilities
- Offices of physicians, dentists, and other health practitioners
- Other private educational services
- Private elementary and secondary schools
- Private hospitals
- Private junior colleges, colleges, universities, and professional schools

Financial Activities

- Commercial and industrial machinery and equipment rental and leasing
- Funds, trusts, and other financial vehicles
- General and consumer goods rental except video tapes and discs
- Imputed rental activity for owner-occupied dwellings
- Insurance agencies, brokerages
- Insurance carriers
- Lessors of nonfinancial intangible assets
- Monetary authorities and depository credit intermediation activities
- Nondepository credit intermediation and related activities
- Real estate establishments
- Securities, commodity contracts, investments, and related activities
- Video tape and disc rental

Information

- Book publishers
- Cable and other subscription programming
- Data processing, hosting, ISP, web search portals and related services
- Directory, mailing list, and other publishers
- Internet publishing and broadcasting
- Motion picture and video industries
- Newspaper publishers
- Other information services
- Periodical publishers
- Radio and television broadcasting
- Software publishers
- Sound recording industries
- Telecommunications

Manufacturing & Utilities

(280 industries)

Natural Resources and Mining

- All other crop farming
- Animal production, except cattle and poultry and eggs
- Cattle ranching and farming
- Commercial fishing
- Commercial hunting and trapping
- Commercial logging
- Cotton farming
- Dairy cattle and milk production
- Drilling oil and gas wells
- Extraction of oil and natural gas
- Forestry, forest products, and timber tract production
- Fruit farming
- Grain farming
- Greenhouse, nursery, and floriculture production
- Mining and quarrying other nonmetallic minerals
- Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals
- Mining and quarrying stone
- Mining coal
- Mining copper, nickel, lead, and zinc
- Mining gold, silver, and other metal ore
- Mining iron ore
- Oilseed farming
- Poultry and egg production
- Sugarcane and sugar beet farming
- Support activities for agriculture and forestry
- Support activities for oil and gas operations
- Support activities for other mining
- Tobacco farming
- Tree nut farming
- Vegetable and melon farming

Other Services

- Automotive repair and maintenance, except car washes
- Car washes
- Civic, social, professional, and similar organizations
- Commercial and industrial machinery and equipment repair and maintenance
- Death care services
- Dry-cleaning and laundry services
- Electronic and precision equipment repair and maintenance
- Grantmaking, giving, and social advocacy organizations
- Other personal services
- Personal and household goods repair and maintenance
- Personal care services
- Private household operations
- Religious organizations

Professional and Business Services

- Accounting, tax preparation, bookkeeping, and payroll services
- Advertising and related services
- All other miscellaneous professional, scientific, and technical services
- Architectural, engineering, and related services
- Business support services
- Computer systems design services
- Custom computer programming services
- Employment services
- Environmental and other technical consulting services
- Facilities support services
- Investigation and security services
- Legal services
- Management of companies and enterprises
- Management, scientific, and technical consulting services
- Office administrative services
- Other computer related services, including facilities management
- Other support services
- Photographic services
- Scientific research and development services
- Services to buildings and dwellings
- Specialized design services
- Travel arrangement and reservation services
- Veterinary services
- Waste management and remediation services

Public Administration

- Federal electric utilities
- Other Federal Government enterprises
- Other state and local government enterprises
- State and local government electric utilities
- State and local government passenger transit
- US Postal Service

Trade

- Retail Nonstores - Direct and electronic sales
- Retail Stores - Building material and garden supply
- Retail Stores - Clothing and clothing accessories
- Retail Stores - Electronics and appliances
- Retail Stores - Food and beverage
- Retail Stores - Furniture and home furnishings
- Retail Stores - Gasoline stations
- Retail Stores - General merchandise
- Retail Stores - Health and personal care
- Retail Stores - Miscellaneous
- Retail Stores - Motor vehicle and parts
- Retail Stores - Sporting goods, hobby, book and music
- Wholesale trade businesses

Transport

- Automotive equipment rental and leasing
- Couriers and messengers
- Scenic and sightseeing transportation and support activities for transportation
- Transit and ground passenger transportation
- Transport by air
- Transport by pipeline
- Transport by rail
- Transport by truck
- Transport by water
- Warehousing and storage