

Arizona Travel Impacts

July 16, 2014

Photo: Boyce Thompson Arboretum State Park

Economic
Impact



Overnight
Visitation



Regional
Profiles



Arizona Travel Industry Performance

2013

Photo: Grand Canyon

\$19.8 billion

direct spending

up 2.7% over 2012

39.1 million

overnight visitors

up 2.5% over 2012

Arizona Travel Impact 2013 Summary

The \$19.8 billion direct spending
generated...

Source: Dean Runyan Associates

Photo: Yuma, Arizona

\$5.4 billion
employment
earnings

up 1.2% YOY



163,500
industry jobs

up 1.4% YOY

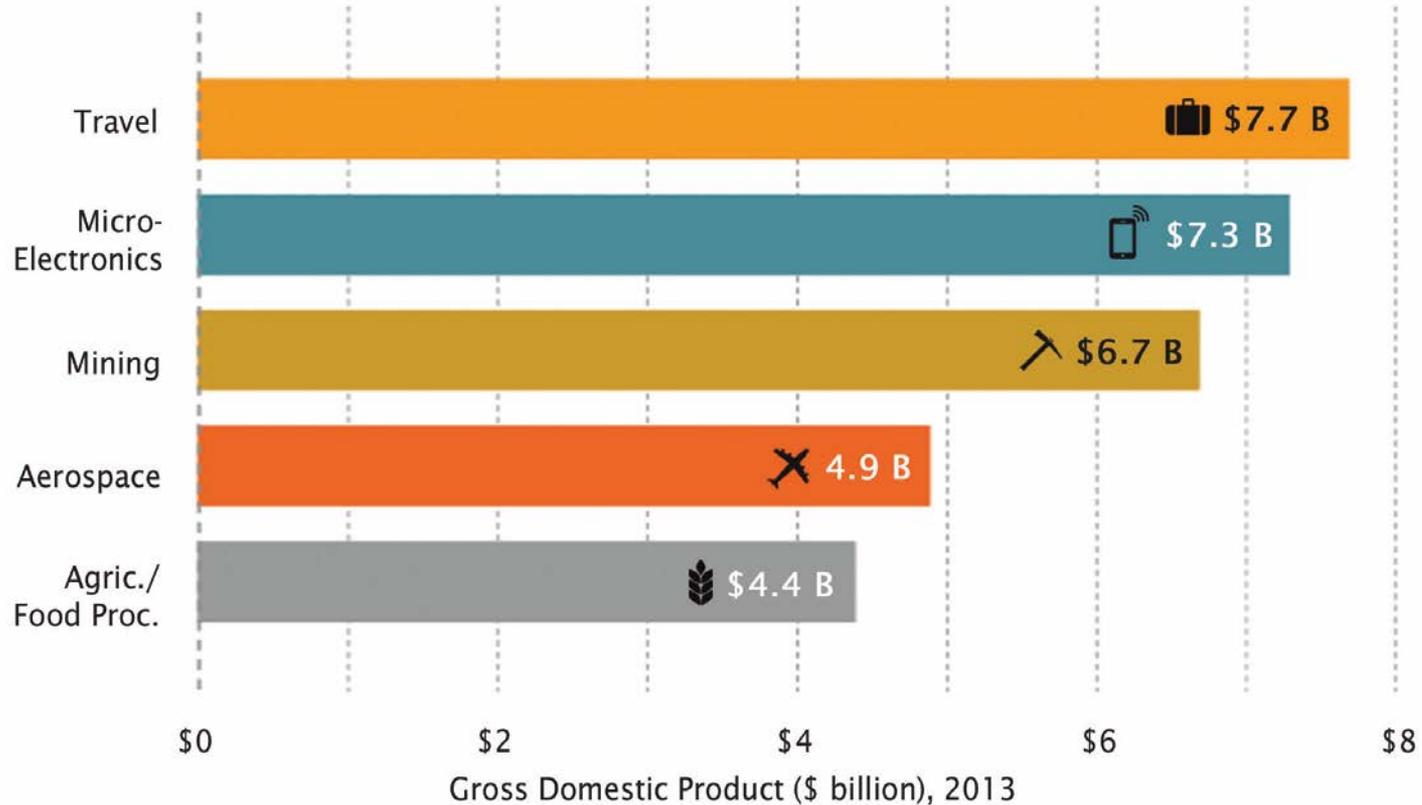


\$2.7 billion
federal, state and
local tax revenue

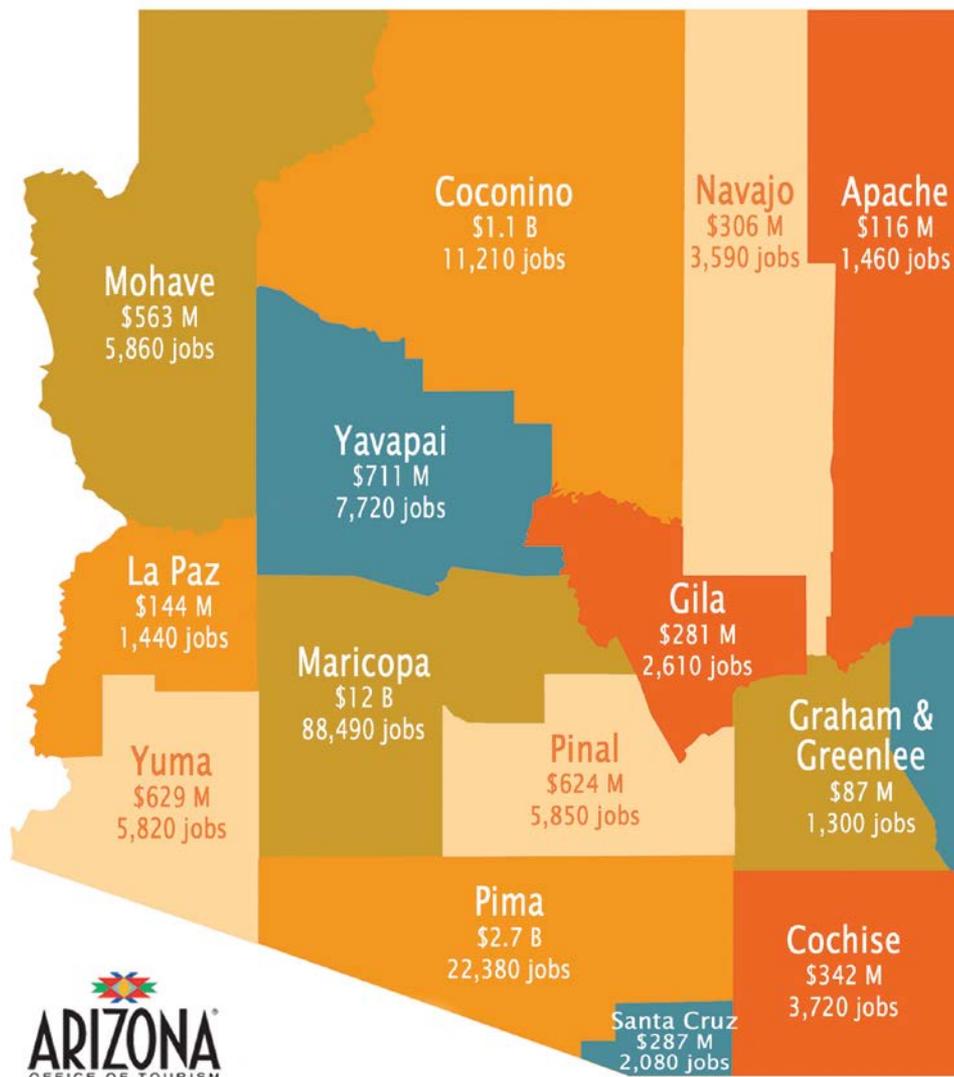
up 3.5% YOY



2013 Gross Domestic Product, Selected Arizona Export-Oriented Industries

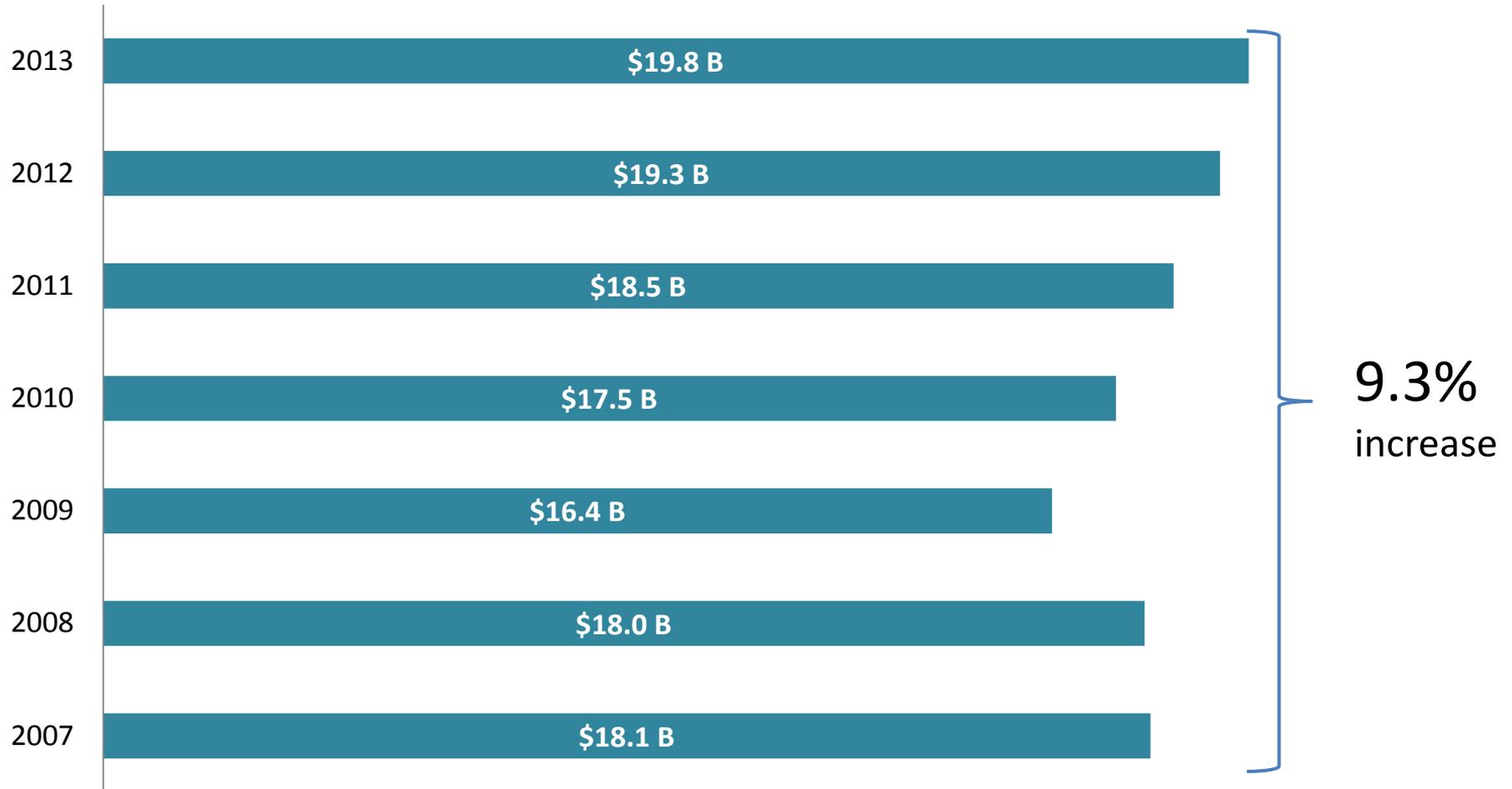


In 2013, the travel and tourism industry positively impacted all 15 counties generating \$19.8 billion in total direct spending



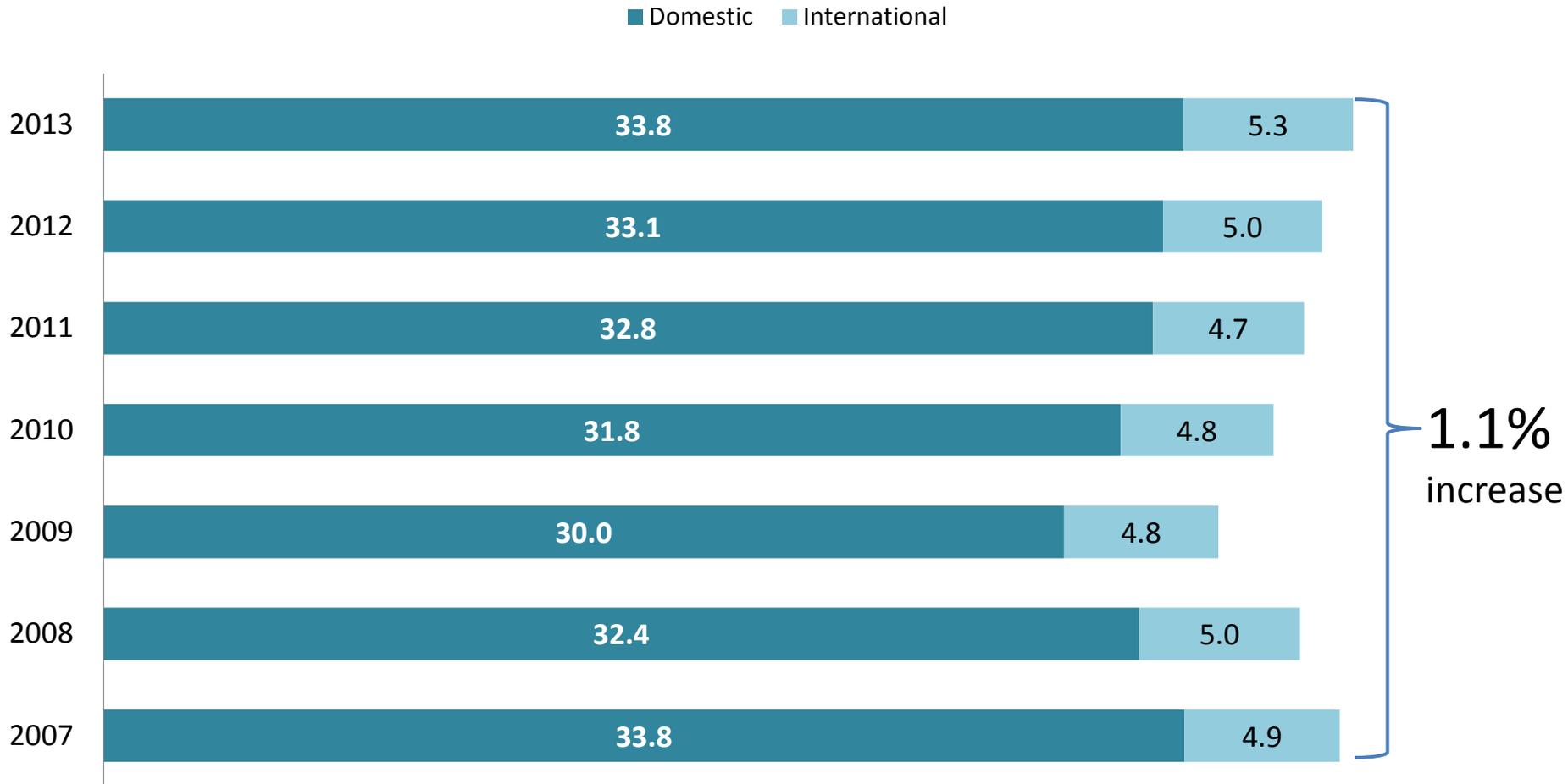
Direct Travel Spending in Arizona

Direct Travel Spending in Arizona, 2007-2013



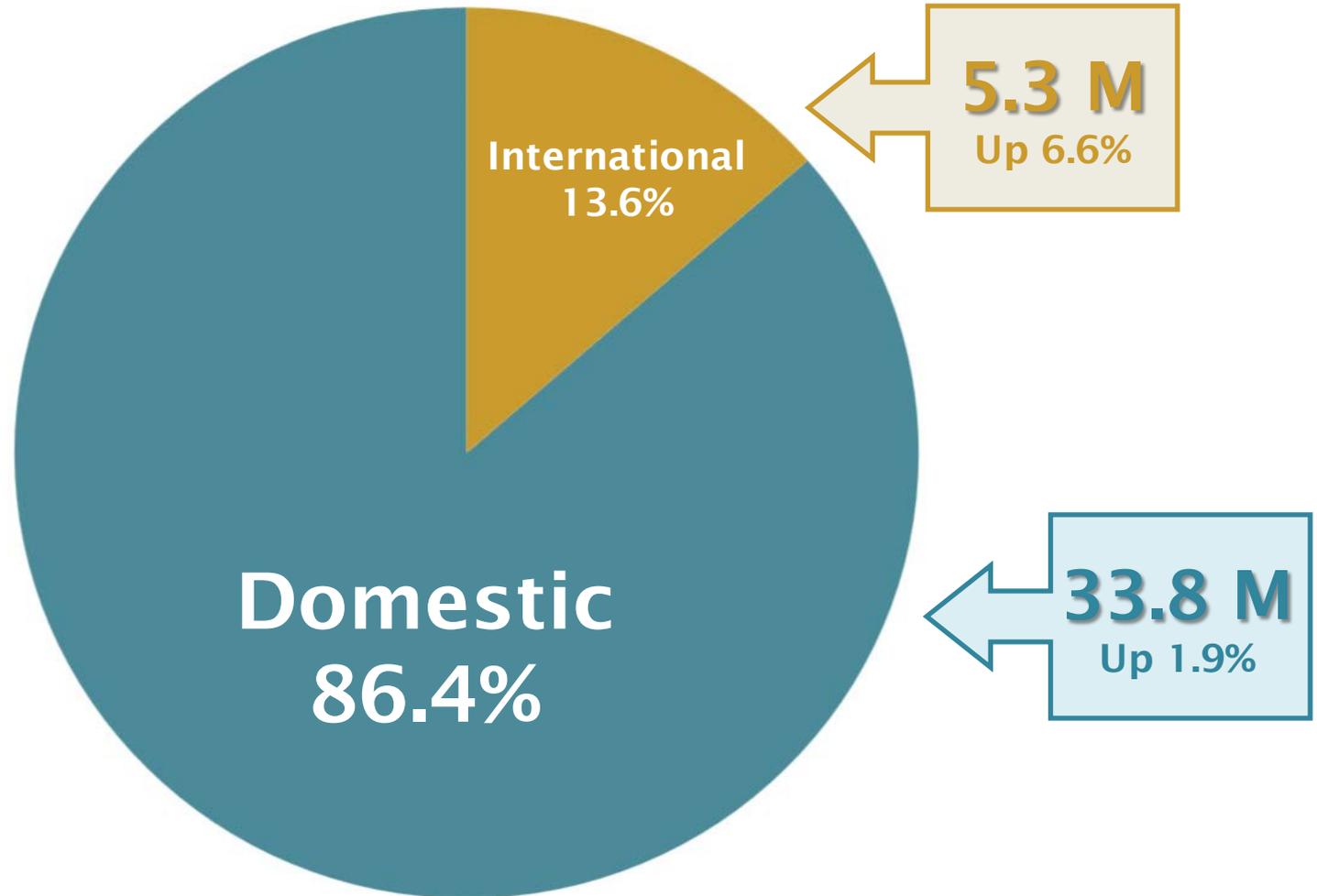
Total Overnight Visitation to Arizona

Total Overnight Visitation to Arizona, 2007-2013



1.1%
increase

2013 Total Overnight Visitation to Arizona: 39.1 Million



International Overnight Visitation



Top Countries of Origin

1 Mexico:	3.6 million	7 Japan:	48,704
2 Canada:	773,260	8 Australia:	43,711
3 Germany:	119,966	9 Switzerland:	34,380
4 United Kingdom:	114,183	10 China:	34,028
5 France:	105,846	11 Brazil:	27,978
6 Korea:	52,725		

Domestic Overnight Visitation

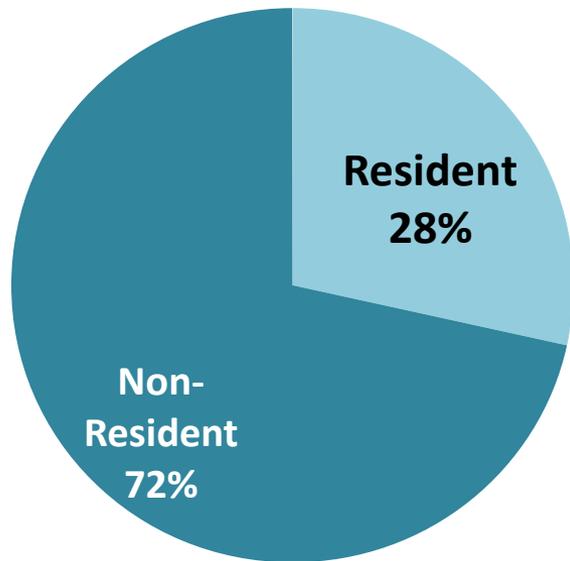


Top States of Origin

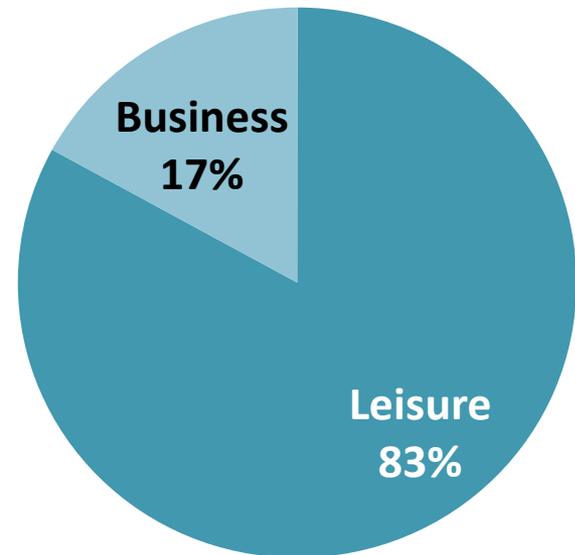
1	Arizona:	9.6 million
2	California:	7.1 million
3	Texas:	1.5 million
4	Illinois:	1.2 million
5	New Mexico:	1.0 million

2013 Domestic Overnight Visitation to Arizona: 33.8 Million

Domestic Visitation 2013:
Resident vs. Non-Resident



Domestic Visitation 2013:
Leisure vs. Business



Arizona Domestic Overnight Visitor Profile 2013

Non-resident		Resident	
72%	share	28%	
4.5	nights	2.2	
2.9	persons	2.9	
\$809	expenditures*	\$372	
74% paid	accommodations	64% paid	
\$71,990	avg HH income	\$54,600	
43.5 years	average age	44.9 years	

Source: Longwoods, Tourism Economics

* trip expenditures per party, does not include transportation to Arizona

Arizona Domestic Overnight Visitor Profile 2013

Leisure		Business	
83.0%	share	17.0%	
3.8	nights	3.4	
3.0	persons	2.3	
\$655	expenditures*	\$737	
70% paid	accommodations	88% paid	
\$65,790	avg HH income	\$78,150	
43.5 years	average age	46.3 years	

Source: Longwoods, Tourism Economics

* trip expenditures per party, does not include transportation to Arizona

2013 Domestic Overnight Travel to Arizona, By Region



Northern Region

2013

Apache, Coconino, and Navajo Counties

Arizona's Northern Region welcomed 7.1 million domestic visitors, up 22.3% year over year (YOY) who spent \$1.5 billion (up 1.3%).

Source: Dean Runyan Associates, Tourism Economics

Photo: Havasu Falls

\$404 million
employment
earnings
up 1.5% YOY



16,300
industry jobs
up 1.1% YOY



\$129 million
state and local
tax revenue
down 3.8% YOY



North Central Region



2013

Gila and Yavapai Counties

Arizona's North Central Region welcomed 5.7 million domestic visitors, up 27.4% year over year (YOY) who spent \$992 million (up 1.8%).

Source: Dean Runyan Associates, Tourism Economics

Photo: Prescott Greenway Trail

\$239 million
employment
earnings
up 3.1% YOY



10,300
industry jobs
down 0.7% YOY



\$76 million
state and local
tax revenue
down 1.7% YOY



Phoenix & Central Region



2013

Maricopa and Pinal Counties

Arizona's Phoenix and Central Region welcomed 17.6 million domestic visitors, up 5.2% year over year (YOY) who spent \$12.6 billion (up 4.4%).

Source: Dean Runyan Associates, Tourism Economics

Photo: Musical Instrument Museum

\$3.7 billion
employment
earnings
up 1.7% YOY



94,300
industry jobs
up 2.4% YOY



\$996 million
state and local
tax revenue
up 0.6% YOY



Tucson & Southern Region

2013

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

In 2013, Arizona's Tucson and Southern Region welcomed 6.4 million domestic visitors, down 8.2% year over year (YOY) who spent \$3.4 billion (down 1.2%).

Source: Dean Runyan Associates, Tourism Economics

Photo: Elgin, Arizona

\$722 million
employment
earnings
down 2.4% YOY



29,500
industry jobs
down 0.4% YOY



\$270 million
state and local
tax revenue
down 2.9% YOY



West Coast Region



2013

La Paz, Mohave, and Yuma Counties

Arizona's West Coast Region welcomed 4.4 million domestic visitors, up 4.4% year over year (YOY) who spent \$1.3 billion (0% change).

Source: Dean Runyan Associates, Tourism Economics

Photo: Yuma, Arizona

\$302 million
employment
earnings
up 1.6% YOY



13,100
industry jobs
up 0.2% YOY



\$106 million
state and local
tax revenue
down 3.0% YOY



ARIZONA OFFICE OF TOURISM INDICATORS: YEAR-TO-DATE



LODGING TRAVEL INDICATORS



19.6M AIR PASSENGERS THROUGH MAY
DOWN 0.3% COMPARED TO 2013



OCCUPANCY: 66.4% THROUGH MAY
UP 5.3% COMPARED TO 2013



REVPAR: \$76.85 THROUGH MAY
UP 9.6% COMPARED TO 2013



ADR: \$115.71 THROUGH MAY
UP 4.1% COMPARED TO 2013



AVERAGE SEARCH TO STAY FOR JULY TRAVEL: 77 DAYS

PARKS VISITATION



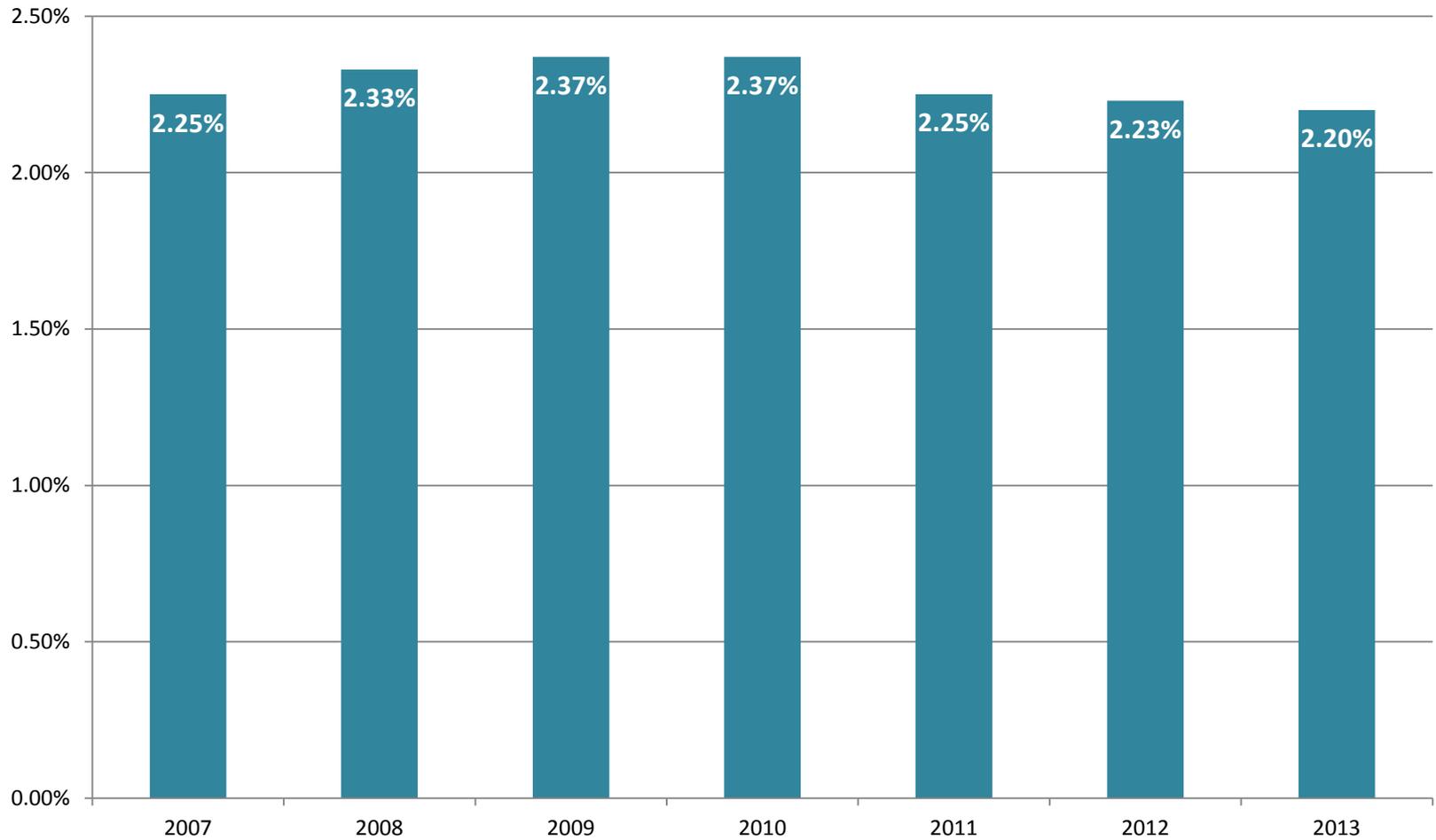
525,657 NATIONAL PARKS VISITORS THROUGH JANUARY
UP 7.7% COMPARED TO 2013



705,443 STATE PARKS VISITORS THROUGH MARCH
UP 9.4% COMPARED TO 2013

Arizona Travel Spending Market Share

Share of Travel Spending in Arizona, 2007-2013



Arizona Travel Market Share Compared to U.S.

Arizona's market share between 2007-2013 has resulted in a cumulative loss in travel and tourism spending of \$1.2 billion.

Source: Dean Runyan Associates

Photo: Goldwater Lake in Prescott, Arizona

\$325 million
cumulative loss in
potential
employment
earnings



10,000
cumulative loss in
potential industry
jobs



\$160 million
cumulative loss in
potential federal,
state and local tax
revenue



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