ARIZONA
OFFICE OF TOURISM

September 4, 2018

The Honorable Douglas A. Ducey
Governor, State of Arizona
1700 W. Washington Street
Phoenix, AZ 85007

Dear Governor:

The Arizona Office of Tourism (AOT) respectfully submits its estimated operating budget in accordance with the guidelines for fiscal years 2019 and 2020.

FY2019 – $7,112,000 lump sum appropriation from the General Fund deposited to Tourism Fund for operations and statewide tourism promotion; and $8,671,952 (est.) ($867,195 to AOT and $7,804,757 to DMO distribution) from the Tourism Fund for Proposition 302/Maricopa County promotion; and $6,600,000 (est.) from the Tourism Fund for Proposition 202/Gaming for statewide tourism promotion.

FY2020 – $13,612,000 lump sum appropriation from the General Fund deposited to Tourism Fund for operations and statewide tourism promotion; and $9,152,222 (est.) ($915,222 to AOT and $8,237,000 to DMO distribution) from the Tourism Fund for Proposition 302/Maricopa County promotion; and $6,700,000 (est.) from the Tourism Fund for Proposition 202/Gaming for statewide tourism promotion.

AOT is the state's only entity promoting Arizona as a travel destination. Our statutory mission is to strengthen and grow Arizona's economy through travel and tourism promotion. Destination marketing is vital to Arizona's economic success as it creates a positive economic cycle of increased traveler visits, greater traveler spending, faster job creation, better commerce opportunities and higher tax revenues, all of which contribute to Arizona's economic growth and infrastructure development.

Visitor dollars have a direct and measurable impact to Arizona's economy by:

- **Importing New Money:** In 2017, Arizona's travel and tourism industry injected $22.7 billion in direct travel spending into the state's economy.
- **Generating Taxes:** Direct visitor spending generated $3.37 billion in travel-related tax revenues in 2017, including $1.9 billion in state and local taxes. These taxes fund essential public amenities that benefit Arizona residents throughout the state including, public safety, education and health services.
- **Creating Jobs:** In 2017, travel spending in Arizona directly generated 187,200 jobs and generated $6.9 billion in earnings.
- **Impacting Rural Communities:** Arizona's travel and tourism industry is an important revenue generator for all 15 counties within the state, but plays a larger, more critical role in diversifying and stabilizing rural economies. Although more travel and tourism employment occurs in urban areas, earnings from this vital industry impacts rural areas far greater than urban.

Tourism is a highly competitive global marketplace. As the competition for visitor dollars increases, so does AOT's need to ensure Arizona is seen as a relevant travel destination against direct competitors such as California, Colorado, Texas and Utah. Many of these competitors have higher tourism budgets leaving Arizona in a vulnerable position of losing visitor market share and the ensuing economic benefits.

Future strategic plans include objectives to amplify Arizona's travel brand, support the expansion of business travel promotion and boost the economic benefits of this important industry to the entire state. *(Arizona Travel Impacts Data Source: Dean Runyan Associates, 2018)*

Sincerely,

Debbie Johnson
Director

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Douglas A. Ducey, Governor ♦ Debbie Johnson, Director
Business-www.Tourism.az.gov Travel Information-www.VisitArizona.com

Arizona Office of Tourism

Transmittal Statement
Organization Chart
Legislation

Section 1

State of Arizona Budget Request

State Agency

Arizona Office of Tourism

A.R.S. Citation: **41-2301**

Governor DUCEY:

This and the accompanying budget schedules, statements and explanatory information constitute the operating budget request for this agency for Fiscal Year 2020.

To the best of my knowledge all statements and explanations contained in the estimates submitted are true and correct.

Agency Head: **Debbie Johnson**

Title: **Director**

Debbie Johnson 9/4/2018

(signature)

Phone: **(602) 364-3718**

Prepared By: **Linda M. Yuhas, CPPB**

Email Address: **lyuhas@tourism.az.gov**

Date Prepared: **Tuesday, September 4, 2018**

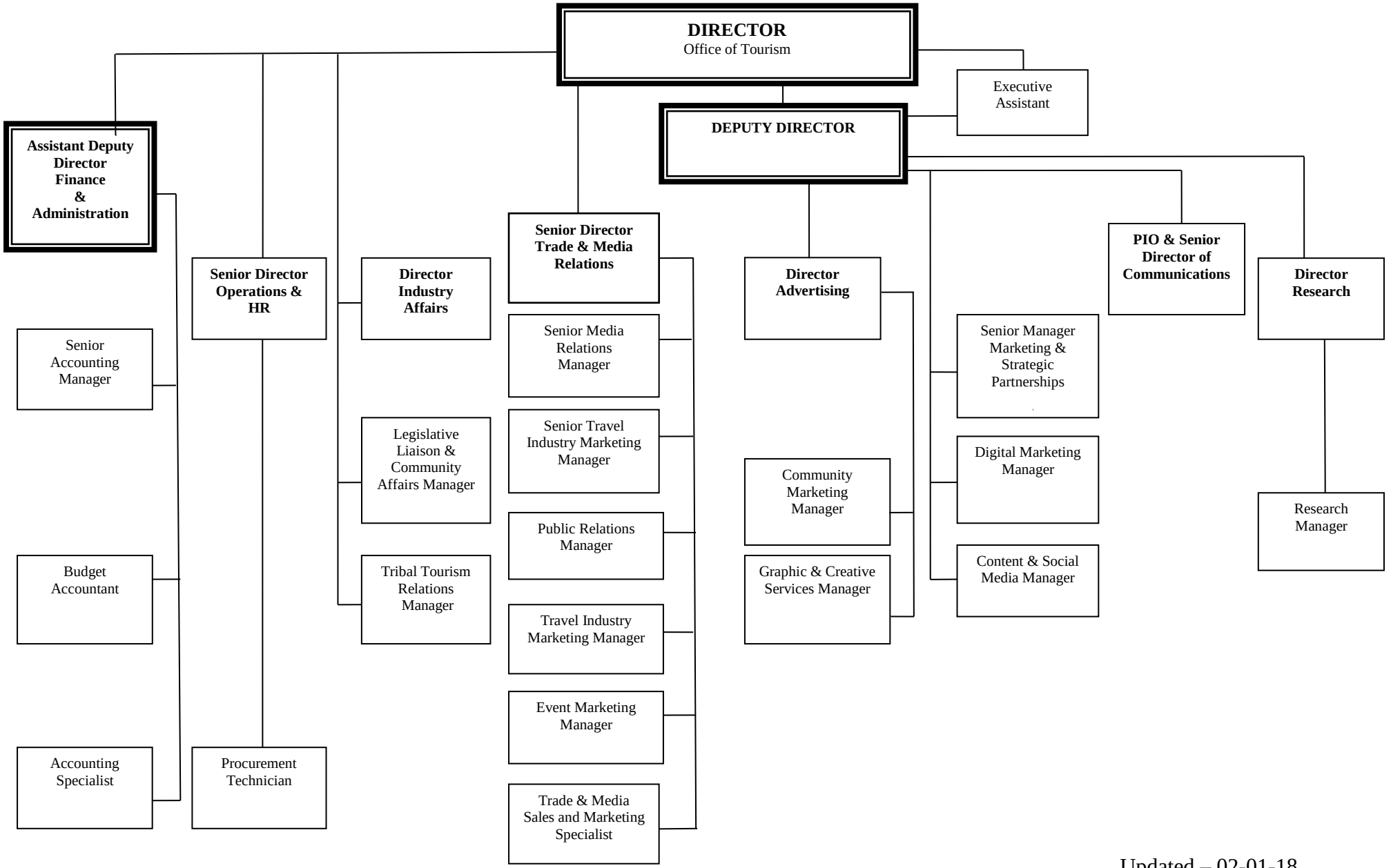
Appropriated Funds

	FY 2019 Approp	FY 2020 Fund. Issue	FY 2020 Total Budget
Total Amount Requested:	7,112.0	6,500.0	13,612.0
General Fund	7,112.0	6,500.0	13,612.0

Non-Appropriated Funds

	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Budget
Total Amount Planned:	22,384.1	0.0	22,384.1
Tourism Fund	22,384.1	0.0	22,384.1

Total:	29,496.1	6,500.0	35,996.1



Updated – 02-01-18

ARIZONA
OFFICE OF TOURISM

41-2306. Tourism fund

(Caution: 1998 Prop 105 applies)

A. The tourism fund is established consisting of separate accounts derived from:

1. State general fund monies appropriated to the fund by the legislature. All monies in this account are continuously appropriated to the office of tourism for the purposes of operations and statewide tourism promotion.

2. Revenues deposited pursuant to section 5-835, subsection B or C. All monies in this account are continuously appropriated to the office of tourism, which, in consultation with a consortium of destination marketing organizations in the county in which the tourism and sports authority is established, shall be spent to promote tourism within that county. For fiscal years 2010-2011 and 2011-2012, fifty per cent of the revenues deposited in the tourism fund pursuant to this paragraph may be expended by the office of tourism for operational and administrative purposes.

3. Revenues deposited pursuant to section 42-6108.01. The legislature shall appropriate all monies in this account to the office of tourism, which, in conjunction with the destination marketing organization in the county in which the tax revenues are collected, shall be spent only to promote tourism within that county and shall not be spent for administrative or overhead expenses.

4. Revenues deposited pursuant to section 5-601.02(H)(3)(b)(iv). The office of tourism shall administer the account. The account is not subject to appropriation, and expenditures from the fund are not subject to outside approval notwithstanding any statutory provision to the contrary. Monies received pursuant to section 5-601.02 shall be deposited directly with this account. On notice from the office of tourism, the state treasurer may invest and divest monies in the account as provided by section 35-313, and monies earned from investment shall be credited to the account. No monies in the account shall revert to or be deposited in any other fund, including the state general fund. Monies in this account shall supplement, not supplant, current funds in other accounts of the tourism fund. Monies in this account shall be spent only to promote tourism within the state and shall not be used for administrative or overhead expenses.

B. Monies in the fund are exempt from the provisions of section 35-190 relating to lapsing of appropriations.

ARIZONA
OFFICE OF TOURISM

41-2308. Special sporting events; promotion and marketing; report; appropriation; definitions

A. Beginning from and after June 30, 2021, the state treasurer shall pay from monies appropriated pursuant to this section one million five hundred thousand dollars per fiscal year, in twelve equal monthly installments, to the office of tourism for the purposes described in this section. The office of tourism shall deposit the monies in a separate fund and shall use the monies to promote and market a special sporting event at a host facility. On or before October 1 of each year, the office of tourism shall report to the joint legislative budget committee the amounts and purposes of all expenditures made pursuant to this subsection in the previous fiscal year.

B. The treasurer may make the payments prescribed in subsection A of this section if the special sporting event project cost incurred from and after December 31, 2016 is at least one hundred million dollars.

C. The host facility shall report to the joint legislative budget committee and the governor's office of strategic planning and budgeting that it has incurred the special sporting event project cost prescribed in subsection B of this section on or before December 31, 2020. The joint legislative budget committee shall certify the expenditures reported by the host facility.

D. If the requirements of subsections B and C of this section are met, the sum of one million five hundred thousand dollars is appropriated annually from the state general fund to the state treasurer for the purposes of this section beginning in fiscal year 2021-2022 and ending in fiscal year 2050-2051.

E. For the purposes of this section:

1. "Host facility" means a complex facility in this state that has fixed seating, that requires a ticket for admission for viewing a sporting event and that was chosen to host a special sporting event by a site selection organization through a competitive selection process that included consideration of at least one facility that is not located in this state.

2. "Special sporting event" means a sporting event that is sanctioned by a nationally recognized premier national auto racing series governing body that establishes an annual schedule of sporting events and grants rights to conduct the events, that has established and administers rules and regulations governing all participants involved in the events and all persons conducting the events and that requires certain liability assurances, including insurance.

3. "Special sporting event project" means:

(a) The acquisition of land subject to property tax in this state to construct a host facility for a special sporting event.

(b) The construction, reconstruction, improvement or renovation of improvements to land subject to property tax in this state of a host facility for a special sporting event.

4. "Special sporting event project cost" means the monies spent from and after December 31, 2016 by the owner of the host facility on the special sporting event project.

Arizona Office of Tourism

Revenue Schedule
Sources & Uses of Funds
Agency Program and Expenditures
Administrative Costs

Section 2

Revenue Schedule

Agency: Arizona Office of Tourism

Fund: 1000 General Fund

AFIS Code	Category of Receipt and Description	FY 2018	FY 2019	FY 2020
4901	OPERATING TRANSFERS IN	7,112.0	7,112.0	13,612.0
	Fund Total:	7,112.0	7,112.0	13,612.0

Revenue Schedule

Agency: Arizona Office of Tourism

Fund: 2236 Tourism Fund

AFIS Code	Category of Receipt and Description	FY 2018	FY 2019	FY 2020
4369	OTHER INTER-AGENCY REVENUE	6,712.1	6,600.0	6,700.0
4616	PRIVATE GRANTS	8,344.8	8,672.0	9,152.2
4901	OPERATING TRANSFERS IN	7,112.0	7,112.0	13,612.0
	Fund Total:	22,168.9	22,384.0	29,464.2

ARIZONA OFFICE OF TOURISM

REVENUE JUSTIFICATION

41-2306. Tourism fund

(Caution: 1998 Prop 105 applies)

A. The tourism fund is established consisting of separate accounts derived from:

1. State general fund monies appropriated to the fund by the legislature. All monies in this account are continuously appropriated to the office of tourism for the purposes of operations and statewide tourism promotion.

2. Revenues deposited pursuant to section 5-835, subsection B or C. All monies in this account are continuously appropriated to the office of tourism, which, in consultation with a consortium of destination marketing organizations in the county in which the tourism and sports authority is established, shall be spent to promote tourism within that county. For fiscal years 2010-2011 and 2011-2012, fifty per cent of the revenues deposited in the tourism fund pursuant to this paragraph may be expended by the office of tourism for operational and administrative purposes.

3. Revenues deposited pursuant to section 42-6108.01. The legislature shall appropriate all monies in this account to the office of tourism, which, in conjunction with the destination marketing organization in the county in which the tax revenues are collected, shall be spent only to promote tourism within that county and shall not be spent for administrative or overhead expenses.

4. Revenues deposited pursuant to section 5-601.02(H)(3)(b)(iv). The office of tourism shall administer the account. The account is not subject to appropriation, and expenditures from the fund are not subject to outside approval notwithstanding any statutory provision to the contrary. Monies received pursuant to section 5-601.02 shall be deposited directly with this account. On notice from the office of tourism, the state treasurer may invest and divest monies in the account as provided by section 35-313, and monies earned from investment shall be credited to the account. No monies in the account shall revert to or be deposited in any other fund, including the state general fund. Monies in this account shall supplement, not supplant, current funds in other accounts of the tourism fund. Monies in this account shall be spent only to promote tourism within the state and shall not be used for administrative or overhead expenses.

B. Monies in the fund are exempt from the provisions of section 35-190 relating to lapsing of appropriations.

Sources and Uses of Funds

Agency: Arizona Office of Tourism

Fund: 2236 Tourism Fund

Cash Flow Summary	Actual FY 2018	Estimate FY 2019	Estimate FY 2020
Balance Forward from Prior Year	3,606.8	3,761.6	3,761.5
Revenue (From Revenue Schedule)	22,168.9	22,384.0	29,464.2
Total Available	25,775.7	26,145.6	33,225.7
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	22,014.1	22,384.1	22,384.1
Balance Forward to Next Year	3,761.6	3,761.5	10,841.6

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2018	Estimate FY 2019	Estimate FY 2020
Personal Services	1,753.4	1,861.5	1,861.5
Employee Related Expenses	612.2	653.2	653.2
Prof. And Outside Services	3,835.2	3,927.1	3,927.1
Travel - In State	14.4	14.2	14.2
Travel - Out of State	174.3	47.2	47.2
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	7,510.3	7,804.8	7,804.8
Other Operating Expenses	8,018.5	8,052.5	8,052.5
Equipment	95.8	23.6	23.6
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	0.0	0.0	0.0
Expenditure Categories Total:	22,014.1	22,384.1	22,384.1
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	22,014.1	22,384.1	22,384.1
Non-Apppropriated FTE:	27.0	28.0	28.0

Fund Description

OSPB: Revenues are from the General Fund, a portion of hotel taxes, car rental surcharges, and contributions paid to the State by Indian Tribes who have tribal-state gaming compacts. These funds are used to support the statewide promotion of the tourism industr

Summary of Expenditure and Budget Request for All Funds

Agency: Arizona Office of Tourism

Appropriated

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Cost Center/Program:					
1	Office of Tourism	7,112.0	7,112.0	6,500.0	13,612.0
		7,112.0	7,112.0	6,500.0	13,612.0
Expenditure Categories					
	FTE	0.0	0.0	4.0	4.0
	Personal Services	0.0	0.0	378.0	378.0
	Employee Related Expenses	0.0	0.0	122.0	122.0
	Professional and Outside Services	0.0	0.0	2,080.0	2,080.0
	Travel In-State	0.0	0.0	20.0	20.0
	Travel Out of State	0.0	0.0	50.0	50.0
	Food	0.0	0.0	0.0	0.0
	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
	Other Operating Expenses	0.0	0.0	3,850.0	3,850.0
	Equipment	0.0	0.0	0.0	0.0
	Capital Outlay	0.0	0.0	0.0	0.0
	Debt Service	0.0	0.0	0.0	0.0
	Cost Allocation	0.0	0.0	0.0	0.0
	Transfers	7,112.0	7,112.0	0.0	7,112.0
Expenditure Categories Total:		7,112.0	7,112.0	6,500.0	13,612.0

Summary of Expenditure and Budget Request for All Funds

Agency: Arizona Office of Tourism

Non-Appropriated

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Cost Center/Program:					
1	Office of Tourism	8,193.3	7,232.2	0.0	7,232.2
2	Tourism Promotion	13,820.8	15,151.9	0.0	15,151.9
		22,014.1	22,384.1	0.0	22,384.1
Expenditure Categories					
	FTE	27.0	28.0	0.0	28.0
	Personal Services	1,753.4	1,861.5	0.0	1,861.5
	Employee Related Expenses	612.2	653.2	0.0	653.2
	Professional and Outside Services	3,835.2	3,927.1	0.0	3,927.1
	Travel In-State	14.4	14.2	0.0	14.2
	Travel Out of State	174.3	47.2	0.0	47.2
	Food	0.0	0.0	0.0	0.0
	Aid to Organizations and Individuals	7,510.3	7,804.8	0.0	7,804.8
	Other Operating Expenses	8,018.5	8,052.5	0.0	8,052.5
	Equipment	95.8	23.6	0.0	23.6
	Capital Outlay	0.0	0.0	0.0	0.0
	Debt Service	0.0	0.0	0.0	0.0
	Cost Allocation	0.0	0.0	0.0	0.0
	Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:		22,014.1	22,384.1	0.0	22,384.1

Summary of Expenditure and Budget Request for All Funds

Agency: Arizona Office of Tourism

Agency Total for All Funds:	29,126.1	29,496.1	6,500.0	35,996.1			

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Fund: 1000 General Fund (Appropriated)

	FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Cost Center/Program:				
1 Office of Tourism	7,112.0	7,112.0	6,500.0	13,612.0
	7,112.0	7,112.0	6,500.0	13,612.0
Expenditure Categories				
FTE	0.0	0.0	4.0	4.0
Personal Services	0.0	0.0	378.0	378.0
Employee Related Expenses	0.0	0.0	122.0	122.0
Professional and Outside Services	0.0	0.0	2,080.0	2,080.0
Travel In-State	0.0	0.0	20.0	20.0
Travel Out of State	0.0	0.0	50.0	50.0
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
Other Operating Expenses	0.0	0.0	3,850.0	3,850.0
Equipment	0.0	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	7,112.0	7,112.0	0.0	7,112.0
Expenditure Categories Total:	7,112.0	7,112.0	6,500.0	13,612.0
Fund Total:	7,112.0	7,112.0	6,500.0	13,612.0

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Fund: 2236 Tourism Fund (Non-Appropriated)

	FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Cost Center/Program:				
1 Office of Tourism	8,193.3	7,232.2	0.0	7,232.2
2 Tourism Promotion	13,820.8	15,151.9	0.0	15,151.9
	22,014.1	22,384.1	0.0	22,384.1
Expenditure Categories				
FTE	27.0	28.0	0.0	28.0
Personal Services	1,753.4	1,861.5	0.0	1,861.5
Employee Related Expenses	612.2	653.2	0.0	653.2
Professional and Outside Services	3,835.2	3,927.1	0.0	3,927.1
Travel In-State	14.4	14.2	0.0	14.2
Travel Out of State	174.3	47.2	0.0	47.2
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	7,510.3	7,804.8	0.0	7,804.8
Other Operating Expenses	8,018.5	8,052.5	0.0	8,052.5
Equipment	95.8	23.6	0.0	23.6
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:	22,014.1	22,384.1	0.0	22,384.1
Fund Total:	22,014.1	22,384.1	0.0	22,384.1

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Fund: 2236 Tourism Fund (Non-Appropriated)

	FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Agency Total for Selected Funds	29,126.1	29,496.1	6,500.0	35,996.1

Program Summary of Expenditures and Budget Request

Agency: Arizona Office of Tourism
Program: Office of Tourism

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Program Summary					
1-1	Administration	15,305.3	14,344.2	6,500.0	20,844.2
	Program Summary Total:	15,305.3	14,344.2	6,500.0	20,844.2
Expenditure Categories					
0000	FTE Positions	27.0	28.0	4.0	32.0
6000	Personal Services	1,753.4	1,861.5	378.0	2,239.5
6100	Employee Related Expenses	612.2	653.2	122.0	775.2
6200	Professional and Outside Services	2,691.0	2,500.2	2,080.0	4,580.2
6500	Travel In-State	14.4	14.2	20.0	34.2
6600	Travel Out of State	174.3	47.2	50.0	97.2
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	2,852.2	2,132.3	3,850.0	5,982.3
8000	Equipment	95.8	23.6	0.0	23.6
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	7,112.0	7,112.0	0.0	7,112.0
	Expenditure Categories Total:	15,305.3	14,344.2	6,500.0	20,844.2
Fund Source					
Appropriated Funds					
1000-A	General Fund (Appropriated)	7,112.0	7,112.0	6,500.0	13,612.0
		7,112.0	7,112.0	6,500.0	13,612.0
Non-Appropriated Funds					
2236-N	Tourism Fund (Non-Appropriated)	8,193.3	7,232.2	0.0	7,232.2
		8,193.3	7,232.2	0.0	7,232.2
	Fund Source Total:	15,305.3	14,344.2	6,500.0	20,844.2

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Program: Office of Tourism

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Fund: 1000-A	**General Fund (Appropriated)**				
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1 Administration		7,112.0	7,112.0	6,500.0	13,612.0
	Total	7,112.0	7,112.0	6,500.0	13,612.0
Appropriated Funding					
Expenditure Categories					
FTE Positions		0.0	0.0	4.0	4.0
Personal Services		0.0	0.0	378.0	378.0
Employee Related Expenses		0.0	0.0	122.0	122.0
Professional and Outside Services		0.0	0.0	2,080.0	2,080.0
Travel In-State		0.0	0.0	20.0	20.0
Travel Out of State		0.0	0.0	50.0	50.0
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		0.0	0.0	0.0	0.0
Other Operating Expenses		0.0	0.0	3,850.0	3,850.0
Equipment		0.0	0.0	0.0	0.0
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		7,112.0	7,112.0	0.0	7,112.0
Expenditure Categories Total:		7,112.0	7,112.0	6,500.0	13,612.0
Fund 1000-A Total:		7,112.0	7,112.0	6,500.0	13,612.0
Program 1 Total:		7,112.0	7,112.0	6,500.0	13,612.0

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Program: Office of Tourism

Fund: 2236-N Tourism Fund (Non-Appropriated)

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1 Administration		8,193.3	7,232.2	0.0	7,232.2
	Total	8,193.3	7,232.2	0.0	7,232.2
Non-Appropriated Funding					
Expenditure Categories					
FTE Positions		27.0	28.0	0.0	28.0
Personal Services		1,753.4	1,861.5	0.0	1,861.5
Employee Related Expenses		612.2	653.2	0.0	653.2
Professional and Outside Services		2,691.0	2,500.2	0.0	2,500.2
Travel In-State		14.4	14.2	0.0	14.2
Travel Out of State		174.3	47.2	0.0	47.2
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		0.0	0.0	0.0	0.0
Other Operating Expenses		2,852.2	2,132.3	0.0	2,132.3
Equipment		95.8	23.6	0.0	23.6
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		0.0	0.0	0.0	0.0
Expenditure Categories Total:		8,193.3	7,232.2	0.0	7,232.2
Fund 2236-N Total:		8,193.3	7,232.2	0.0	7,232.2
Program 1 Total:		8,193.3	7,232.2	0.0	7,232.2

Program Budget Unit Summary of Expenditures and Budget Request for All Funds

Agency: Arizona Office of Tourism
Program: Administration

Expenditure Categories		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
0000	FTE	27.0	28.0	4.0	32.0
6000	Personal Services	1,753.4	1,861.5	378.0	2,239.5
6100	Employee Related Expenses	612.2	653.2	122.0	775.2
6200	Professional and Outside Services	2,691.0	2,500.2	2,080.0	4,580.2
6500	Travel In-State	14.4	14.2	20.0	34.2
6600	Travel Out of State	174.3	47.2	50.0	97.2
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	2,852.2	2,132.3	3,850.0	5,982.3
8000	Equipment	95.8	23.6	0.0	23.6
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	7,112.0	7,112.0	0.0	7,112.0
	Expenditure Categories Total:	15,305.3	14,344.2	6,500.0	20,844.2
Fund Source					
Appropriated Funds					
	1000-A General Fund (Appropriated)	7,112.0	7,112.0	6,500.0	13,612.0
		7,112.0	7,112.0	6,500.0	13,612.0
Non-Appropriated Funds					
	2236-N Tourism Fund (Non-Appropriated)	8,193.3	7,232.2	0.0	7,232.2
		8,193.3	7,232.2	0.0	7,232.2
	Fund Source Total:	15,305.3	14,344.2	6,500.0	20,844.2

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Program: Administration

Fund: 1000-A General Fund

Appropriated

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
0000	FTE	0.0	0.0	4.0	4.0
6000	Personal Services	0.0	0.0	378.0	378.0
6100	Employee Related Expenses	0.0	0.0	122.0	122.0
6200	Professional and Outside Services	0.0	0.0	2,080.0	2,080.0
6500	Travel In-State	0.0	0.0	20.0	20.0
6600	Travel Out of State	0.0	0.0	50.0	50.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	0.0	0.0	3,850.0	3,850.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	7,112.0	7,112.0	0.0	7,112.0
Appropriated Total:		7,112.0	7,112.0	6,500.0	13,612.0
Fund Total:		7,112.0	7,112.0	6,500.0	13,612.0
Program Total For Selected Funds:		7,112.0	7,112.0	6,500.0	13,612.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Program: Administration

Fund: 2236-N Tourism Fund

Non-Appropriated

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
0000	FTE	27.0	28.0	0.0	28.0
6000	Personal Services	1,753.4	1,861.5	0.0	1,861.5
6100	Employee Related Expenses	612.2	653.2	0.0	653.2
6200	Professional and Outside Services	2,691.0	2,500.2	0.0	2,500.2
6500	Travel In-State	14.4	14.2	0.0	14.2
6600	Travel Out of State	174.3	47.2	0.0	47.2
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	2,852.2	2,132.3	0.0	2,132.3
8000	Equipment	95.8	23.6	0.0	23.6
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
	Non-Appropriated Total:	8,193.3	7,232.2	0.0	7,232.2
Fund Total:		8,193.3	7,232.2	0.0	7,232.2
Program Total For Selected Funds:		8,193.3	7,232.2	0.0	7,232.2

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Administration**

	FY 2018 Actual	FY 2019 Expd. Plan
FTE	27.0	28.0
Expenditure Category Total	**27.0**	**28.0**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	27.0	28.0
	27.0	**28.0**
Fund Source Total	**27.0**	**28.0**
Personal Services	1,753.4	1,861.5
Boards and Commissions	0.0	0.0
Expenditure Category Total	**1,753.4**	**1,861.5**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	1,753.4	1,861.5
	1,753.4	**1,861.5**
Fund Source Total	**1,753.4**	**1,861.5**
Employee Related Expenses	612.2	653.2
Expenditure Category Total	**612.2**	**653.2**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	612.2	653.2
	612.2	**653.2**
Fund Source Total	**612.2**	**653.2**
Professional and Outside Services		2,500.2
External Prof/Outside Serv Budg And Appn	0.0	
External Investment Services	0.0	
Other External Financial Services	0.0	
Attorney General Legal Services	0.0	
External Legal Services	0.8	
External Engineer/Architect Cost - Exp	0.0	
External Engineer/Architect Cost- Cap	0.0	
Other Design	0.0	
Temporary Agency Services	8.8	
Hospital Services	0.0	
Other Medical Services	0.0	
Institutional Care	0.0	
Education And Training	2.8	
Vendor Travel	185.4	
Professional & Outside Services Excluded from Cost Alloca	0.0	
Vendor Travel - Non Reportable	0.0	
External Telecom Consulting Services	0.0	
Costs related to those in custody of the State	0.0	
Non - Confidential Specialist Fees	0.0	
Confidential Specialist Fees	0.0	
Outside Actuarial Costs	0.0	
Other Professional And Outside Services	2,493.2	

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Administration**

	FY 2018 Actual	FY 2019 Expd. Plan
Expenditure Category Total	**2,691.0**	**2,500.2**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	2,691.0	2,500.2
	2,691.0	**2,500.2**
Fund Source Total	**2,691.0**	**2,500.2**
Travel In-State	14.4	14.2
Expenditure Category Total	**14.4**	**14.2**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	14.4	14.2
	14.4	**14.2**
Fund Source Total	**14.4**	**14.2**
Travel Out of State	174.3	47.2
Expenditure Category Total	**174.3**	**47.2**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	174.3	47.2
	174.3	**47.2**
Fund Source Total	**174.3**	**47.2**
Food	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Aid to Organizations and Individuals	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**

Other Operating Expenses		2,132.3
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	7.7	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Administration**

	FY 2018 Actual	FY 2019 Expd. Plan
Other Insurance-Related Charges	0.0	
Internal Service Data Processing	8.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	62.1	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.2	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	9.5	
Pmt for AFIS Development & Usage	0.0	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	34.2	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.4	
Electricity	0.0	
Sanitation Waste Disposal	0.0	
Water	0.0	
Gas And Fuel Oil For Buildings	0.0	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	
Rental Of Land And Buildings	172.2	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.0	
Miscellaneous Rent	107.2	
Interest On Overdue Payments	0.0	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	3.9	
Other Internal Services	0.0	
Repair And Maintenance - Buildings	0.0	
Repair And Maintenance - Vehicles	0.0	
Repair And Maint - Mainframe And Legacy	3.0	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	0.0	
Other Repair And Maintenance	0.0	
Software Support And Maintenance	10.6	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	12.2	
Computer Supplies	0.6	
Housekeeping Supplies	0.0	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.0	
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	0.0	
Repair And Maintenance Supplies-Building	0.0	
Other Operating Supplies	9.5	

Program Expenditure Schedule

Agency:	Arizona Office of Tourism
Program:	Administration

	FY 2018 Actual	FY 2019 Expd. Plan
Publications	0.0	
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	0.0	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	22.9	
Other Education And Training Costs	0.0	
Advertising	1,664.9	
Sponsorships	52.6	
Internal Printing	1.4	
External Printing	18.8	
Photography	84.4	
Postage And Delivery	334.6	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	1.6	
Distribution To State Universities	0.0	
Other Intrastate Distributions	0.0	
Awards	0.4	
Entertainment And Promotional Items	95.2	
Dues	100.5	
Books- Subscriptions And Publications	31.9	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	
Other Miscellaneous Operating	1.8	

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Administration**

	FY 2018 Actual	FY 2019 Expd. Plan
Expenditure Category Total	**2,852.2**	**2,132.3**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	2,852.2	2,132.3
	2,852.2	**2,132.3**
Fund Source Total	**2,852.2**	**2,132.3**

Current Year Expenditures		23.6
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	16.2	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	
Purchased Or Licensed Software-Website	0.0	
Internally Generated Software-Website	0.0	
Development in Progress	0.0	
Right-Of-Way/Easement/Extraction Rights	0.0	
Oth Int Assets purchased, licensed or internally generate	0.0	
Other intangible assets acquired by capital lease	0.0	
Other Capital Asset Purchases	0.0	
Leasehold Improvement-Capital Purchase	0.0	
Other Capital Asset Leases	0.0	
Non-Capital Equip Budget And Approp	0.0	
Vehicles Non-Capital Purchase	0.0	
Vehicles Non-Capital Leases	0.0	
Furniture Non-Capital Purchase	1.3	
Works Of Art And Hist Treas-Non Capital	0.0	
Furniture Non-Capital Leases	0.0	
Computer Equipment Non-Capital Purchase	4.7	
Computer Equipment Non-Capital Lease	0.0	
Telecomm Equip Non-Capital Purchase	0.0	
Telecomm Equip Non-Capital Leases	0.0	
Other Equipment Non-Capital Purchase	0.0	
Weapons Non-Capital Purchase	0.0	
Other Equipment Non-Capital Lease	0.0	
Purchased Or Licensed Software/Website	73.7	
Internally Generated Software/Website	0.0	
LICENSES AND PERMITS	0.0	
Right-Of-Way/Easement/Extraction Exp	0.0	
Other Intangible Assets - Purchased, Licensed or Internall	0.0	
Noncapital Software/Web By Capital Lease	0.0	
Other Intangible Assets Acquired by Capital Lease	0.0	
Other Long Lived Tangible Assets to be Expenses	0.0	
Non-Capital Equipment Excluded from Cost Allocation	0.0	

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Administration**

	FY 2018 Actual	FY 2019 Expd. Plan
Expenditure Category Total	**95.8**	**23.6**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	95.8	23.6
	95.8	**23.6**
Fund Source Total	**95.8**	**23.6**
Capital Outlay	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Debt Service	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Cost Allocation	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Transfers	7,112.0	7,112.0
Expenditure Category Total	**7,112.0**	**7,112.0**
Appropriated		
1000-A General Fund (Appropriated)	7,112.0	7,112.0
	7,112.0	**7,112.0**
Fund Source Total	**7,112.0**	**7,112.0**

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	28.0	1,861.5	2236-N

Combined Regular & Elected Positions At/Above FICA Maximum of $127,200

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Program Summary of Expenditures and Budget Request

Agency: Arizona Office of Tourism
Program: Tourism Promotion

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Program Summary					
2-1	Statewide Tourism Promotion	5,476.0	6,479.9	0.0	6,479.9
2-3	Maricopa County Tourism Promotion	8,344.8	8,672.0	0.0	8,672.0
	Program Summary Total:	13,820.8	15,151.9	0.0	15,151.9
Expenditure Categories					
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	1,144.2	1,426.9	0.0	1,426.9
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	7,510.3	7,804.8	0.0	7,804.8
7000	Other Operating Expenses	5,166.3	5,920.2	0.0	5,920.2
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
	Expenditure Categories Total:	13,820.8	15,151.9	0.0	15,151.9
Fund Source					
Non-Appropriated Funds					
2236-N	Tourism Fund (Non-Appropriated)	13,820.8	15,151.9	0.0	15,151.9
		13,820.8	15,151.9	0.0	15,151.9
	Fund Source Total:	13,820.8	15,151.9	0.0	15,151.9

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism
Program: Tourism Promotion

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
Fund: 2236-N	**Tourism Fund (Non-Appropriated)**				
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
2-1	Statewide Tourism Promotion	5,476.0	6,479.9	0.0	6,479.9
2-3	Maricopa County Tourism Promotion	8,344.8	8,672.0	0.0	8,672.0
	Total	13,820.8	15,151.9	0.0	15,151.9
Non-Appropriated Funding					
Expenditure Categories					
	Personal Services	0.0	0.0	0.0	0.0
	Employee Related Expenses	0.0	0.0	0.0	0.0
	Professional and Outside Services	1,144.2	1,426.9	0.0	1,426.9
	Travel In-State	0.0	0.0	0.0	0.0
	Travel Out of State	0.0	0.0	0.0	0.0
	Food	0.0	0.0	0.0	0.0
	Aid to Organizations and Individuals	7,510.3	7,804.8	0.0	7,804.8
	Other Operating Expenses	5,166.3	5,920.2	0.0	5,920.2
	Equipment	0.0	0.0	0.0	0.0
	Capital Outlay	0.0	0.0	0.0	0.0
	Debt Service	0.0	0.0	0.0	0.0
	Cost Allocation	0.0	0.0	0.0	0.0
	Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:		13,820.8	15,151.9	0.0	15,151.9
Fund 2236-N Total:		13,820.8	15,151.9	0.0	15,151.9
Program 2 Total:		13,820.8	15,151.9	0.0	15,151.9

Program Budget Unit Summary of Expenditures and Budget Request for All Funds

Agency: Arizona Office of Tourism
Program: Statewide Tourism Promotion

Expenditure Categories		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	1,048.0	1,426.9	0.0	1,426.9
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	4,428.0	5,053.0	0.0	5,053.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
	Expenditure Categories Total:	5,476.0	6,479.9	0.0	6,479.9

Fund Source					
Non-Appropriated Funds					
2236-N	Tourism Fund (Non-Appropriated)	5,476.0	6,479.9	0.0	6,479.9
		5,476.0	6,479.9	0.0	6,479.9
	Fund Source Total:	5,476.0	6,479.9	0.0	6,479.9

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Program: Statewide Tourism Promotion

Fund: 2236-N Tourism Fund

Non-Appropriated

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	1,048.0	1,426.9	0.0	1,426.9
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	4,428.0	5,053.0	0.0	5,053.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		5,476.0	6,479.9	0.0	6,479.9
Fund Total:		5,476.0	6,479.9	0.0	6,479.9
Program Total For Selected Funds:		5,476.0	6,479.9	0.0	6,479.9

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Statewide Tourism Promotion**

		FY 2018 Actual	FY 2019 Expd. Plan
FTE		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Personal Services		0.0	0.0
Boards and Commissions		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Employee Related Expenses		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Professional and Outside Services			1,426.9
External Prof/Outside Serv Budg And Appn		0.0	
External Investment Services		0.0	
Other External Financial Services		0.0	
Attorney General Legal Services		0.0	
External Legal Services		0.0	
External Engineer/Architect Cost - Exp		0.0	
External Engineer/Architect Cost- Cap		0.0	
Other Design		0.0	
Temporary Agency Services		0.0	
Hospital Services		0.0	
Other Medical Services		0.0	
Institutional Care		0.0	
Education And Training		0.0	
Vendor Travel		29.4	
Professional & Outside Services Excluded from Cost Alloca		0.0	
Vendor Travel - Non Reportable		0.0	
External Telecom Consulting Services		0.0	
Costs related to those in custody of the State		0.0	
Non - Confidential Specialist Fees		0.0	
Confidential Specialist Fees		0.0	
Outside Actuarial Costs		0.0	
Other Professional And Outside Services		1,018.5	
	Expenditure Category Total	**1,048.0**	**1,426.9**
Non-Appropriated			
2236-N Tourism Fund (Non-Appropriated)		1,048.0	1,426.9
		1,048.0	**1,426.9**
	Fund Source Total	**1,048.0**	**1,426.9**
Travel In-State		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Travel Out of State		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Food		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Statewide Tourism Promotion**

	FY 2018 Actual	FY 2019 Expd. Plan
Aid to Organizations and Individuals	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**

Other Operating Expenses		5,053.0
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	0.0	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	
Other Insurance-Related Charges	0.0	
Internal Service Data Processing	0.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	0.0	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.0	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	28.3	
Pmt for AFIS Development & Usage	0.0	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	0.0	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.0	
Electricity	0.0	
Sanitation Waste Disposal	0.0	
Water	0.0	
Gas And Fuel Oil For Buildings	0.0	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	
Rental Of Land And Buildings	0.0	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.0	

Program Expenditure Schedule

Agency:	Arizona Office of Tourism
Program:	Statewide Tourism Promotion

	FY 2018 Actual	FY 2019 Expd. Plan
Miscellaneous Rent	0.0	
Interest On Overdue Payments	0.0	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	0.0	
Other Internal Services	0.0	
Repair And Maintenance - Buildings	0.0	
Repair And Maintenance - Vehicles	0.0	
Repair And Maint - Mainframe And Legacy	0.0	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	0.0	
Other Repair And Maintenance	0.0	
Software Support And Maintenance	0.0	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	0.0	
Computer Supplies	0.0	
Housekeeping Supplies	0.0	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.0	
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	0.0	
Repair And Maintenance Supplies-Building	0.0	
Other Operating Supplies	0.0	
Publications	0.0	
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	0.0	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	21.3	
Other Education And Training Costs	0.0	
Advertising	4,123.6	
Sponsorships	192.9	
Internal Printing	0.0	
External Printing	0.0	
Photography	3.0	
Postage And Delivery	0.0	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	0.0	
Distribution To State Universities	0.0	
Other Intrastate Distributions	0.0	
Awards	0.0	
Entertainment And Promotional Items	29.8	

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Statewide Tourism Promotion**

	FY 2018 Actual	FY 2019 Expd. Plan
Dues	0.4	
Books- Subscriptions And Publications	27.4	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	
Other Miscellaneous Operating	1.3	
Expenditure Category Total	**4,428.0**	**5,053.0**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	4,428.0	5,053.0
	4,428.0	**5,053.0**
Fund Source Total	**4,428.0**	**5,053.0**

Current Year Expenditures		0.0
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	0.0	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	
Purchased Or Licensed Software-Website	0.0	
Internally Generated Software-Website	0.0	
Development in Progress	0.0	
Right-Of-Way/Easement/Extraction Rights	0.0	
Oth Int Assets purchased, licensed or internally generate	0.0	
Other intangible assets acquired by capital lease	0.0	
Other Capital Asset Purchases	0.0	

Program Expenditure Schedule

Agency: Arizona Office of Tourism

Program: Statewide Tourism Promotion

	FY 2018 Actual	FY 2019 Expd. Plan
Leasehold Improvement-Capital Purchase	0.0	
Other Capital Asset Leases	0.0	
Non-Capital Equip Budget And Approp	0.0	
Vehicles Non-Capital Purchase	0.0	
Vehicles Non-Capital Leases	0.0	
Furniture Non-Capital Purchase	0.0	
Works Of Art And Hist Treas-Non Capital	0.0	
Furniture Non-Capital Leases	0.0	
Computer Equipment Non-Capital Purchase	0.0	
Computer Equipment Non-Capital Lease	0.0	
Telecomm Equip Non-Capital Purchase	0.0	
Telecomm Equip Non-Capital Leases	0.0	
Other Equipment Non-Capital Purchase	0.0	
Weapons Non-Capital Purchase	0.0	
Other Equipment Non-Capital Lease	0.0	
Purchased Or Licensed Software/Website	0.0	
Internally Generated Software/Website	0.0	
LICENSES AND PERMITS	0.0	
Right-Of-Way/Easement/Extraction Exp	0.0	
Other Intangible Assets - Purchased, Licensed or Internall	0.0	
Noncapital Software/Web By Capital Lease	0.0	
Other Intangible Assets Acquired by Capital Lease	0.0	
Other Long Lived Tangible Assets to be Expenses	0.0	
Non-Capital Equipment Excluded from Cost Allocation	0.0	
Expenditure Category Total	**0.0**	**0.0**
Capital Outlay	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Debt Service	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Cost Allocation	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Transfers	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**

Combined Regular & Elected Positions At/Above FICA Maximum of $127,200

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for All Funds

Agency: Arizona Office of Tourism
Program: Maricopa County Tourism Promotion

Expenditure Categories		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	96.2	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	7,510.3	7,804.8	0.0	7,804.8
7000	Other Operating Expenses	738.3	867.2	0.0	867.2
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
	Expenditure Categories Total:	8,344.8	8,672.0	0.0	8,672.0
Fund Source					
Non-Appropriated Funds					
2236-N	Tourism Fund (Non-Appropriated)	8,344.8	8,672.0	0.0	8,672.0
		8,344.8	8,672.0	0.0	8,672.0
	Fund Source Total:	8,344.8	8,672.0	0.0	8,672.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Office of Tourism

Program: Maricopa County Tourism Promotion

Fund: 2236-N Tourism Fund

Non-Appropriated

		FY 2018 Actual	FY 2019 Expd. Plan	FY 2020 Fund. Issue	FY 2020 Total Request
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	96.2	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	7,510.3	7,804.8	0.0	7,804.8
7000	Other Operating Expenses	738.3	867.2	0.0	867.2
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		8,344.8	8,672.0	0.0	8,672.0
Fund Total:		8,344.8	8,672.0	0.0	8,672.0
Program Total For Selected Funds:		8,344.8	8,672.0	0.0	8,672.0

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Maricopa County Tourism Promotion**

		FY 2018 Actual	FY 2019 Expd. Plan
FTE		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Personal Services		0.0	0.0
Boards and Commissions		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Employee Related Expenses		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Professional and Outside Services			0.0
External Prof/Outside Serv Budg And Appn		0.0	
External Investment Services		0.0	
Other External Financial Services		0.0	
Attorney General Legal Services		0.0	
External Legal Services		0.0	
External Engineer/Architect Cost - Exp		0.0	
External Engineer/Architect Cost- Cap		0.0	
Other Design		0.0	
Temporary Agency Services		0.0	
Hospital Services		0.0	
Other Medical Services		0.0	
Institutional Care		0.0	
Education And Training		0.0	
Vendor Travel		8.7	
Professional & Outside Services Excluded from Cost Alloca		0.0	
Vendor Travel - Non Reportable		0.0	
External Telecom Consulting Services		0.0	
Costs related to those in custody of the State		0.0	
Non - Confidential Specialist Fees		0.0	
Confidential Specialist Fees		0.0	
Outside Actuarial Costs		0.0	
Other Professional And Outside Services		87.5	
	Expenditure Category Total	**96.2**	**0.0**
Non-Appropriated			
2236-N Tourism Fund (Non-Appropriated)		96.2	0.0
		96.2	**0.0**
	Fund Source Total	**96.2**	**0.0**
Travel In-State		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Travel Out of State		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Food		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Maricopa County Tourism Promotion**

	FY 2018 Actual	FY 2019 Expd. Plan
Aid to Organizations and Individuals	7,510.3	7,804.8
Expenditure Category Total	**7,510.3**	**7,804.8**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	7,510.3	7,804.8
	7,510.3	**7,804.8**
Fund Source Total	**7,510.3**	**7,804.8**

Other Operating Expenses		867.2
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	0.0	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	
Other Insurance-Related Charges	0.0	
Internal Service Data Processing	0.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	0.0	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.0	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	0.0	
Pmt for AFIS Development & Usage	0.0	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	0.0	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.0	
Electricity	0.0	
Sanitation Waste Disposal	0.0	
Water	0.0	
Gas And Fuel Oil For Buildings	0.0	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	

Program Expenditure Schedule

Agency:	Arizona Office of Tourism
Program:	Maricopa County Tourism Promotion

	FY 2018 Actual	FY 2019 Expd. Plan
Rental Of Land And Buildings	0.0	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.0	
Miscellaneous Rent	0.0	
Interest On Overdue Payments	0.0	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	0.0	
Other Internal Services	0.0	
Repair And Maintenance - Buildings	0.0	
Repair And Maintenance - Vehicles	0.0	
Repair And Maint - Mainframe And Legacy	0.0	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	0.0	
Other Repair And Maintenance	0.0	
Software Support And Maintenance	0.0	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	0.1	
Computer Supplies	0.0	
Housekeeping Supplies	0.0	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.0	
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	0.0	
Repair And Maintenance Supplies-Building	0.0	
Other Operating Supplies	0.0	
Publications	0.0	
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	0.0	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	0.0	
Other Education And Training Costs	0.0	
Advertising	618.9	
Sponsorships	79.3	
Internal Printing	0.0	
External Printing	0.0	
Photography	35.1	
Postage And Delivery	0.2	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	0.0	
Distribution To State Universities	0.0	

Program Expenditure Schedule

Agency:	**Arizona Office of Tourism**
Program:	**Maricopa County Tourism Promotion**

	FY 2018 Actual	FY 2019 Expd. Plan
Other Intrastate Distributions	0.0	
Awards	0.0	
Entertainment And Promotional Items	4.8	
Dues	0.0	
Books- Subscriptions And Publications	0.0	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	
Other Miscellaneous Operating	0.0	
Expenditure Category Total	**738.3**	**867.2**
Non-Appropriated		
2236-N Tourism Fund (Non-Appropriated)	738.3	867.2
	738.3	**867.2**
Fund Source Total	**738.3**	**867.2**
Current Year Expenditures		0.0
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	0.0	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	
Purchased Or Licensed Software-Website	0.0	
Internally Generated Software-Website	0.0	
Development in Progress	0.0	
Right-Of-Way/Easement/Extraction Rights	0.0	

Program Expenditure Schedule

Agency: Arizona Office of Tourism

Program: Maricopa County Tourism Promotion

	FY 2018 Actual	FY 2019 Expd. Plan
Oth Int Assets purchased, licensed or internally generate	0.0	
Other intangible assets acquired by capital lease	0.0	
Other Capital Asset Purchases	0.0	
Leasehold Improvement-Capital Purchase	0.0	
Other Capital Asset Leases	0.0	
Non-Capital Equip Budget And Approp	0.0	
Vehicles Non-Capital Purchase	0.0	
Vehicles Non-Capital Leases	0.0	
Furniture Non-Capital Purchase	0.0	
Works Of Art And Hist Treas-Non Capital	0.0	
Furniture Non-Capital Leases	0.0	
Computer Equipment Non-Capital Purchase	0.0	
Computer Equipment Non-Capital Lease	0.0	
Telecomm Equip Non-Capital Purchase	0.0	
Telecomm Equip Non-Capital Leases	0.0	
Other Equipment Non-Capital Purchase	0.0	
Weapons Non-Capital Purchase	0.0	
Other Equipment Non-Capital Lease	0.0	
Purchased Or Licensed Software/Website	0.0	
Internally Generated Software/Website	0.0	
LICENSES AND PERMITS	0.0	
Right-Of-Way/Easement/Extraction Exp	0.0	
Other Intangible Assets - Purchased, Licensed or Internall	0.0	
Noncapital Software/Web By Capital Lease	0.0	
Other Intangible Assets Acquired by Capital Lease	0.0	
Other Long Lived Tangible Assets to be Expenses	0.0	
Non-Capital Equipment Excluded from Cost Allocation	0.0	
Expenditure Category Total	**0.0**	**0.0**
Capital Outlay	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Debt Service	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Cost Allocation	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Transfers	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**

Combined Regular & Elected Positions At/Above FICA Maximum of $127,200

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Administrative Costs

Agency: Arizona Office of Tourism

Administrative Costs Summary

Common Administrative Area	FY 2020
Personal Services	1,861.5
ERE	653.2
All Other	590.0
Administrative Costs Total:	3,104.7

Administrative Cost / Total Expenditure Ratio

	Request	Admin %
FY 2020	35,996.1	8.6%

Arizona Office of Tourism
Funding Issues
Section 3

A. Tracking the Impact of the Final Four Promotion
B. The Economic Impact of the Final Four
C. Super Bowl Economic Impact
D. The Economic Impact of College Football Playoff
E. Arizona's International Visitation
F. Australia and New Zealand Market Information – Brand USA 2018
G. Arizona's International Visitor Tracking
H. FY18 Campaign Results
I. FY18 Advertising Effectiveness Research
J. Defining Conventions as Urban Innovation and Economic Accelerators, Skift 2017
K. Arizona Travel Impacts, Dean Runyan Associates June 2018

Funding Issues List

Agency: Arizona Office of Tourism

FY 2020

Priority	Funding Issue Title	Total FTE	Total Amount	General Fund	Other Aprop. Funds	Non-App Funds
1	Global Awareness through Special Events	0.0	2,000.0	2,000.0	0.0	0.0
2	International Marketing	0.0	1,000.0	1,000.0	0.0	0.0
3	Target City Marketing	0.0	1,000.0	1,000.0	0.0	0.0
4	Business Travel Development	0.0	1,000.0	1,000.0	0.0	0.0
5	Rural & Tribal Community/Product Development	0.0	1,000.0	1,000.0	0.0	0.0
6	Optimize Operations	4.0	500.0	500.0	0.0	0.0
	Total:	4.0	6,500.0	6,500.0	0.0	0.0
	Decision Package Total:	4.0	6,500.0	6,500.0	0.0	0.0

Funding Issue Detail

Agency: Arizona Office of Tourism

Issue: 1 Global Awareness through Special Events

Program: Administration
Fund: 1000-A General Fund (Appropriated)

Calculated ERE: $0.00
Uniform Allowance: $0.00

Expenditure Categories	FY 2020
FTE	0.0
Personal Services	0.0
Employee Related Expenses	0.0
Subtotal Personal Services and ERE:	0.0
Professional & Outside Services	150.0
Travel In-State	0.0
Travel Out-of-State	0.0
Food	0.0
Aid to Organizations & Individuals	0.0
Other Operating Expenditures	1,850.0
Equipment	0.0
Capital Outlay	0.0
Debt Services	0.0
Cost Allocation	0.0
Transfers	0.0
Program / Fund Total:	2,000.0

Issue: 2 International Marketing

Program: Administration
Fund: 1000-A General Fund (Appropriated)

Calculated ERE: $0.00
Uniform Allowance: $0.00

Expenditure Categories	FY 2020
FTE	0.0
Personal Services	0.0
Employee Related Expenses	0.0
Subtotal Personal Services and ERE:	0.0
Professional & Outside Services	100.0
Travel In-State	0.0
Travel Out-of-State	0.0
Food	0.0
Aid to Organizations & Individuals	0.0
Other Operating Expenditures	900.0
Equipment	0.0
Capital Outlay	0.0
Debt Services	0.0
Cost Allocation	0.0
Transfers	0.0
Program / Fund Total:	1,000.0

Funding Issue Detail

Agency: Arizona Office of Tourism

Issue: 3 **Target City Marketing**

Program: Administration
Fund: 1000-A General Fund (Appropriated)

Calculated ERE: $0.00
Uniform Allowance: $0.00

Expenditure Categories	FY 2020
FTE	0.0
Personal Services	0.0
Employee Related Expenses	0.0
Subtotal Personal Services and ERE:	0.0
Professional & Outside Services	100.0
Travel In-State	0.0
Travel Out-of-State	0.0
Food	0.0
Aid to Organizations & Individuals	0.0
Other Operating Expenditures	900.0
Equipment	0.0
Capital Outlay	0.0
Debt Services	0.0
Cost Allocation	0.0
Transfers	0.0
Program / Fund Total:	1,000.0

Issue: 4 **Business Travel Development**

Program: Administration
Fund: 1000-A General Fund (Appropriated)

Calculated ERE: $0.00
Uniform Allowance: $0.00

Expenditure Categories	FY 2020
FTE	0.0
Personal Services	0.0
Employee Related Expenses	0.0
Subtotal Personal Services and ERE:	0.0
Professional & Outside Services	850.0
Travel In-State	0.0
Travel Out-of-State	50.0
Food	0.0
Aid to Organizations & Individuals	0.0
Other Operating Expenditures	100.0
Equipment	0.0
Capital Outlay	0.0
Debt Services	0.0
Cost Allocation	0.0
Transfers	0.0
Program / Fund Total:	1,000.0

Funding Issue Detail

Agency: Arizona Office of Tourism

Issue: 5 Rural & Tribal Community/Product Development

Program: Administration
Fund: 1000-A General Fund (Appropriated)

Calculated ERE: $0.00
Uniform Allowance: $0.00

Expenditure Categories	FY 2020
FTE	0.0
Personal Services	0.0
Employee Related Expenses	0.0
Subtotal Personal Services and ERE:	0.0
Professional & Outside Services	880.0
Travel In-State	20.0
Travel Out-of-State	0.0
Food	0.0
Aid to Organizations & Individuals	0.0
Other Operating Expenditures	100.0
Equipment	0.0
Capital Outlay	0.0
Debt Services	0.0
Cost Allocation	0.0
Transfers	0.0
Program / Fund Total:	1,000.0

Issue: 6 Optimize Operations

Program: Administration
Fund: 1000-A General Fund (Appropriated)

Calculated ERE: $115.10
Uniform Allowance: $0.00

Expenditure Categories	FY 2020
FTE	4.0
Personal Services	378.0
Employee Related Expenses	122.0
Subtotal Personal Services and ERE:	500.0
Professional & Outside Services	0.0
Travel In-State	0.0
Travel Out-of-State	0.0
Food	0.0
Aid to Organizations & Individuals	0.0
Other Operating Expenditures	0.0
Equipment	0.0
Capital Outlay	0.0
Debt Services	0.0
Cost Allocation	0.0
Transfers	0.0
Program / Fund Total:	500.0

Arizona Office of Tourism
Fiscal Year (FY) 2020 Funding Issues Justifications

Agency Description

Pursuant to A.R.S. § 41-2305, the Arizona Office of Tourism (AOT) serves as the only public agency with the powers and duties to lead the global destination marketing efforts for the state of Arizona. AOT implements year-round global marketing initiatives to attract travelers to the state for the purposes of generating tourism-related economic revenue. AOT promotes Arizona as a travel destination in local, regional, national and international markets including Canada, China, Germany, France, Mexico and the United Kingdom (UK).

In fiscal year (FY) 2020, AOT requests $13,612,000 State General Fund monies be lump sum appropriated and deposited in the Tourism Fund.

The travel and tourism sector is essential to the Arizona economy and its residents. Without the strategic investment in Arizona's destination marketing programs, our state risks losing valuable travel-generated tax revenue that contributes directly to statewide economic growth and infrastructure development.

Additionally, the Arizona travel and tourism industry (including public lands agencies promoting national parks, state parks, public lands and tribal lands) relies on AOT to create an umbrella travel marketing campaign to position and promote Arizona as a relevant travel destination against a highly competitive global marketplace.

Arizona's travel and tourism industry has a direct connection to our state's economy and gives back to local communities. In 2017, 43.9 million domestic and international overnight visitors generated $22.7 billion in spending. This spending supported 187,200 travel-related jobs in Arizona. These statewide jobs, which cannot be outsourced, generated $6.9 billion in earnings for Arizona residents. Additionally, this spending generated $3.37 billion in local, state and federal tax revenues, $932 million in state taxes alone. In turn, these taxes help fund essential public service programs such as education, safety and health. *(See section 6: AOT's Industry Brochure)*

Funding Issue 1: Global Awareness through Special Events

Issue:
Arizona has a strong history of successfully hosting special events that not only bring thousands of visitors to enjoy the event, but also provide a global marketing opportunity for Arizona that we otherwise could not afford to purchase.

Arizona is set to host several special events within the next few years. These events need marketing support from AOT to further broaden the awareness of Arizona's diverse travel offerings, promote the state as a welcoming destination and invoke a sense of community pride with statewide residents. AOT's marketing support will generate more statewide visitation, which will lead to an increase in visitor spending and tax revenue for Arizona.

We know this is a marketing strategy that works for Arizona. AOT research vendor Adara proved that our specific Final Four campaign influenced nearly 19,000 flight bookings to Arizona bringing people from across the U.S. who spent upwards of 88,700 nights in market. The Final Four campaign resulted in incremental travel to destinations across the state. More than 57 percent of bookings were to destinations other than Phoenix. This is travel to Arizona that would likely not have happened otherwise. *(See attachment 3.A: Tracking the Impact of the Final Four Promotion.* See *attachment 3.B: The Economic Impact of Final Four Phoenix)*.

Proposal:
For FY 2020, AOT's Strategic Plan will include plans to provide marketing elements, such as print, digital, social media activities and consumer activations, to support several upcoming special events including continued promotion for the Grand Canyon National Park's Centennial Celebration and Super Bowl 2023.

Alternatives Considered:
No alternatives considered.

Impact of Not Funding:
Without funding AOT cannot expand the global awareness to Arizona through the promotion of special events to generate visitor spending throughout the state. Special events have already demonstrated their contribution to the Arizona economy. *(See attachment 3.C: Arizona State University Super Bowl Economic Impact; See attachment 3.D: The Economic Impact of College Football Playoff)*

Statutory reference:
A.R.S. § 41-2305 (A.1) (A.5)

Equipment to be Purchased:
None

Classification of New Positions:
Please see Funding Issue 6

Annualization:
Not Applicable

Funding Issue 2: International Marketing

Issue:
AOT needs to capitalize on the growth of emerging international visitor markets to boost visitation to Arizona. Currently, international visitation accounts for 14 percent of Arizona's total overnight visitation. Visitation generates an economic cycle of spending, jobs, earnings and tax revenue that occurs throughout the state and directly contributes to our state's economy.

AOT has established marketing programs in six key international visitor markets: Canada, China, Germany, France, Mexico and the UK. However, the agency is missing important opportunities to expand the Arizona travel brand not only in these key markets, but also in emerging visitor markets where inbound visitation is growing by double digits, such as Australia. According to the U.S. Department of Commerce, visitors to the U.S. from Australia stay longer than any other inbound visitor market—22 days, on average.

Additionally, repeat visitation to the U.S. by Australian travelers is 73 percent—higher than any other inbound visitor market. Since 2010, Arizona has experienced a 51 percent growth in visitation from the Australian market. *(See attachment 3.E: Arizona's International Visitation; See attachment 3.F: Brand USA Australia and New Zealand Market Information 2018.)*

Proposal:
For Fiscal Year (FY) 2020, AOT plans to boost international visitation to Arizona by:

- Providing press trips and travel trade familiarization tours to expose international travel media, tour operators and travel agents to Arizona's travel offerings.
- Participating in key media missions and tradeshows, such as the Visit USA Roadshow Australia, to build awareness of the Arizona travel brand.

- Establishing contract agency representation in Australia to build media relationships and travel trade infrastructure.
- Increasing international consumer travel advertising campaign efforts by participating in Brand USA's co-operative marketing program to reach more international visitor markets and maximize available marketing dollars.

Alternatives Considered:
No alternatives considered.

Impact of Not Funding:
International visitation to Arizona has a direct and measurable impact to our state's economy. In 2017, Arizona welcomed 5.56 million international visitors, with overseas visitation increasing by 1.5 percent year-over-year. (*See attachment 3G: International Visitor Volumes for Arizona, 2017 Analysis)*.

Lack of funding will negatively affect the positive momentum Arizona is currently experiencing with international visitation. AOT's ability to inspire more international visitation to our state will be limited, which will affect the amount of spending that occurs from visitation. Lack of funding will also hinder AOT's ability to fulfill the agency's primary mission, which is to strengthen and grow Arizona's economy through travel and tourism promotion.

Statutory reference:
A.R.S. § 41-2305 (A.1) (A.5) (B.2) and (B.3)

Equipment to be Purchased:
None

Classification of New Positions:
Please see Funding Issue 6

Annualization:
Not Applicable

Funding Issue 3: Target City Marketing

Issue:
In 2017, more than 38 million domestic visitors experienced Arizona as a travel destination. This accounts for 86 percent of Arizona's total visitation.

Each year, to complement its national advertising campaign activities, AOT will activate concentrated marketing efforts in Targeted Cities across the nation to inspire visitation to Arizona. According to AOT research, potential travelers from the feeder markets identified through the Target City Marketing program have a strong likelihood to visit Arizona. Target Cities for FY 2019 include Seattle, Minneapolis, Chicago, San Francisco and New York.

Through this program, AOT promotes the Arizona travel brand message by layering print, digital, social media, media relations and travel trade efforts in these select cities to provide a well-rounded, high-impact marketing program. Additionally, this program enables AOT to customize campaign messages to further reach potential visitors and uniquely inspire visitation from each visitor market. However, AOT is missing important opportunities to expand its Target City Marketing program to reach potential travelers not only in our established target city markets, but also in additional domestic feeder markets.

Proposal:
AOT's FY 2020 Strategic Plan will include efforts to increase existing marketing efforts in our five established target cities and expand the program to add marketing and promotion efforts in additional domestic feeder markets such as Dallas-Ft. Worth, San Antonio, Austin and/or Denver.

Alternatives Considered:
No alternatives considered.

Impact of Not Funding:
AOT's Target City Marketing program has proven to influence visitation to Arizona and encouraging visitor spending. During our FY18 campaign period, this program generated nearly 14,000 hotel bookings at an Average Daily Rate (ADR) of $182, 34 percent higher than the average statewide ADR. This one campaign alone also generated more than $6 million in travel-related revenue. *(See attachment 3.H: AOT FY18 Campaign Results, Adara)* AOT marketing has also proven to be a wise investment. Compared to previous years, our advertising return on investment in FY18 was 25% higher. *(See attachment 3.I: AOT FY18 Advertising Effectiveness Research, SMARI)*

Lack of funding will negatively affect the positive momentum Arizona is currently experiencing with its Target City Market program and domestic visitation. AOT's ability to inspire more domestic visitation to our state will be limited, which will affect the amount of spending that occurs from visitation. Lack of funding will also hinder AOT's ability to fulfill the agency's primary mission, which is to strengthen and grow Arizona's economy through travel and tourism promotion.

Statutory reference:
A.R.S. § 41-2305 (A.1) (A.5) (B.2) and (B.3)

Equipment to be Purchased:
None

Classification of New Positions:
Please see Funding Issue 6

Annualization:
Not Applicable

Funding Issue 4: Business Travel Development

Issue:
Business travel (e.g. business-related meetings, conventions, conference, trade shows and exhibitions) accounts for 17 percent (6.1 million) of Arizona's total domestic visitation. When meetings are conducted within the state, the business opportunities create jobs, generate commerce and produce far-reaching community impact.

AOT is missing opportunities to support the expansion of business travel and attraction for Arizona.

Tourism is one of Arizona's strongest economic drivers and provides the first impression for visitors and business travelers. Global business leaders experience Arizona's vast variety of hotels, resorts, restaurants, attractions, landscapes and destination while simultaneously learning about the state's business and commerce opportunities.

Furthermore, meeting and conventions play a key role in statewide economic planning and development by attracting outside corporate investments and talent to Arizona. According to research, destination marketing organizations who work together with local and state governments can position a travel destination as a place to live, work and recreate. (*See attachment 3.J: Defining Conventions as Urban Innovation and Economic Accelerators, Skift, 2017)*

Proposal:
AOT's FY 2020 Strategic Plan will include plans to support the work of our statewide Destination Marketing Organization partners and the Arizona Commerce Authority in business travel promotion and attraction by:

- Creating co-operative marketing opportunities enabling industry partners to bring awareness to Arizona at major business-related tradeshows including IMEX America - America's worldwide exhibition for incentive travel, meetings and events.
- Build advertising campaigns to run in business travel-related media.

Alternatives Considered:
No alternatives considered.

Impact of Not Funding:
Lack of funding will limit AOT's ability to expand or support the promotion of business travel and attraction to Arizona. Lack of funding will also hinder AOT's ability to fulfill the agency's primary mission, which is to strengthen and grow Arizona's economy through travel and tourism promotion.

Statutory reference:
A.R.S. § 41-2305 (A.1.5)

Equipment to be Purchased:
None

Classification of New Positions:
Please see Funding Issue 6

Annualization:
Not Applicable

Funding Issue 5: Rural and Tribal Community/Product Development

Issue:
According to AOT research, 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. Resort guests are important to these areas and, hence, a large proportion of travel expenditures are spent on overnight lodging. However, in many of the less urbanized areas of Arizona the economic significance of travel and tourism is actually more important.

In Arizona's rural and tribal areas leisure and hospitality businesses are generally much more dependent on visitor spending rather than on local residents. *(See attachment 3.K: Arizona Travel Impacts, Dean Runyan Associations, 2000-2017, pgs. 34-35)*

AOT is missing opportunities to provide destination marketing and product development support to Arizona's rural and tribal communities to expand the economic impact of tourism.

Proposal:
AOT's FY 2020 Strategic Plan will include destination marketing and product development support for rural and tribal tourism partners. The program will help rural and tribal destinations identify new tourism assets and develop marketing strategies for tourism promotion. The program will include:

- Providing consultation and education regarding tourism product and infrastructure development for rural and tribal communities.
- Providing research and establishing a model for sustainable and smart growth tourism.
- Enhancing rural marketing co-operative match program for tourism program.
- Expanding AOT's local visitor information center program for visitor outreach.

Alternatives Considered:
No alternatives considered.

Impact of Not Funding:
Lack of funding will limit AOT's ability to expand Arizona's tourism product in our critical rural and tribal areas and will hinder AOT's ability to fulfill the agency's primary mission, which is to strengthen and grow Arizona's economy through travel and tourism promotion.

Statutory reference:
A.R.S. § 41-2305 (A.1) (A.5) (B.2) (B.3) (B.7) and (B.8)

Equipment to be Purchased:
None

Classification of New Positions:
Please see Funding Issue 6

Annualization:
Not Applicable

Funding Issue 6: Optimize Operations

Issue:
As AOT's scope of work expands, additional staff is needed to develop efficient and effective tourism marketing programs that will produce positive results.

Proposal:
Potential new positions would include:

- Rural Development Program Manager.
- Product Development Manager.
- Digital and Social Media Coordinator.
- Partnership & Events Coordinator.

Alternatives Considered:
No alternatives considered.

Impact of Not Funding:
AOT will not be able to successfully implement new marketing or product development programs or operate as effectively without these important positions.

Statutory reference:
A.R.S. § 41-2305

Equipment to be Purchased:
None

Classification of New Positions:
Not Applicable

Annualization:
Not Applicable

Tracking the Impact of the Final Four Promotion



WHAT DID WE WANT TO KNOW?

- Was promotion of a large event by the state a success?
- Did other destinations across Arizona benefit from these efforts?
- How do we define success for promotion of the Final Four?



DEFINED NEW MEASUREMENTS FOR SUCCESS

OLD WAY	NEW WAY
Impressions	Confirmed Bookings
Clicks	Hotel Revenue
CTR	Quality of Trip

ADARA



TRACKED COMPONENTS

Final Four branded creative

- Seven media vendors
- Feb 1- April 3, 2017

ADARA

ADARA IS THE WORLD'S TRAVEL DATA CO-OP WITH A SIMPLE VISION OF GROWING THE TRAVEL INDUSTRY TOGETHER

HOSPITALITY

HYATT
Marriott
The Ritz-Carlton
Preferred Hotels & Resorts
The Rezidor Hotel Group
Louvre Hotels Group
BW Best Western Hotels & Resorts
CHOICE HOTELS
HomeAway

AIRLINES

DELTA
UNITED
American Airlines
Etihad Airways
KLM Royal Dutch Airlines
Virgin America
IBERIA
South African Airways
tigerair
scoot
cebu pacific
airberlin.com Your Airline.

TRANSPORT

Hertz
NCL Norwegian Cruise Line
National Rail
national express
SuperShuttle
trainline
CHANGI airport singapore

GENERAL

Frommer's
Roomkey
oyster.com
evite
punchbowl
only-apartments
hipmunk
helloworld
Travel.jp
zuji
hotelscombined
viator

ADARA

ADARA TRACKING FOR THE FINAL FOUR PROMOTION



1

Place ADARA Analytics Pixels in website header or tag management solution, and within ad tags for each Media Partner (one time setup)

2

When a traveler views your ad or visits your website, the ADARA pixels fire. ADARA places a 3rd party cookie or records the impression / visit event

3

ADARA connects website visit(s) and advertising impressions for this cookie to travel activity across its network of first party data partners

4

View reports in Magellan with all travel activity connected to your digital campaigns & detailed traveler profiles

No extrapolation is used at any point and all analytics are based on 1st party, deterministic data.

ADARA

TRACKED FLIGHT DATA ATTRIBUTED TO FINAL FOUR ADVERTISING



645,473
Flight Searches



18,982
Flight Bookings



88,741
nights in market

Date range: 2/1/17-4/3/17. Data is final

ADARA

TRACKED HOTEL DATA ATTRIBUTED TO FINAL FOUR ADVERTISING



367,706
hotel searches



12,097
hotel bookings

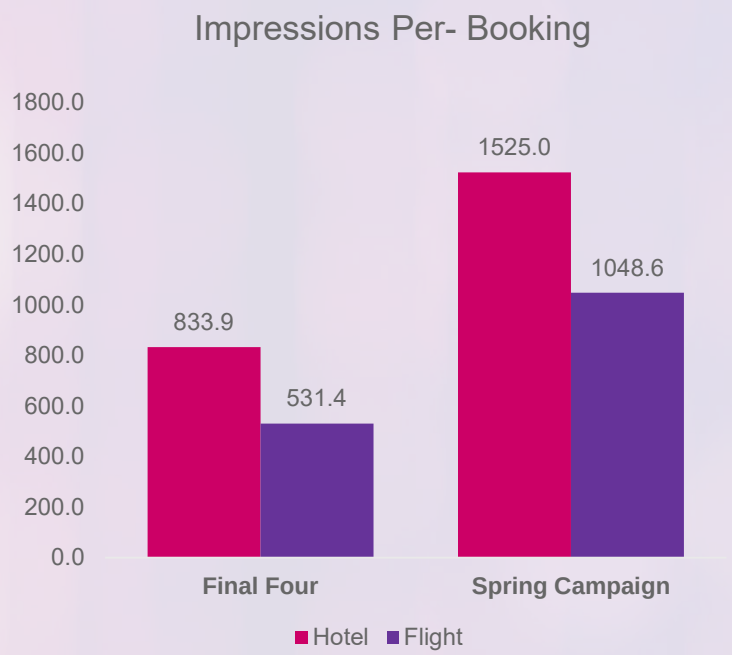


$4.75 Million
tracked revenue

Date range: 2/1/17-4/3/17. Data is final

ADARA

CONVERSION EFFICIENCY



Final Four advertising generated higher efficiency rates for generating both flight and hotel bookings in comparison to the overall campaign.

Date range: 2/1/17-4/3/17. Data iis final

ADARA

A CLOSER LOOK AT FINAL FOUR MEDIA INFLUENCED TRAVELERS

$207.43 ADR



$183.52 ADR

2.7 Night LOS



2.1 Night LOS



1.6 travelers

per party on average

Date range: 2/1/17-4/3/17. Data is final

ADARA

TRIP PLANNING IN DAYS

Destination New South Wales media influenced visitors spend a comparable amount of time searching and booking hotel and flights into the market, while hotel reservations tend to have a five-day longer advance purchase window.



Date range: 2/1/17-4/3/17. Data is final

ADARA

WHAT ARE THE KEY ORIGIN MARKETS?

KEY HOTEL ORIGIN MARKETS

FINAL FOUR

Origin	% of Booking
Phoenix, AZ, US	12.9%
Los Angeles, CA, US	7.5%
SF Bay Area, CA, US	5.0%
New York, NY, US	4.0%
Chicago, IL, US	4.0%
Tucson, AZ, US	3.7%
Seattle-Tacoma, WA, US	3.1%
Denver, CO, US	2.6%
Dallas-Ft Worth, TX, US	2.5%
Washington, DC, US	2.3%

SPRING CAMPAIGN

Origin	% of Booking
Phoenix, AZ, US	17.5
Los Angeles, CA, US	6.8
Tucson, AZ, US	5.1
SF Bay Area, CA, US	4.2
New York, NY, US	3.7
Chicago, IL, US	3.4
Dallas-Ft Worth, TX, US	2.5
Seattle-Tacoma, WA, US	2.5
Albuquerque, NM, US	2.2
Denver, CO, US	2.2

ADARA

Date range: 2/1/17-4/3/17. Data is final



WHERE DID MEDIA INFLUENCED VISITORS BOOK IN ARIZONA?

ARIZONA DESTINATIONS

Destination	% of Bookings
Phoenix	20.7%
Scottsdale	11.3%
Tucson	9.5%
Flagstaff	7.0%
Tempe	6.7%
Page	5.8%
Grand Canyon	5.1%
Sedona	4.3%
Mesa	4.3%
Chandler	3.2%

Final Four advertising generated travel to destinations across the state.

In several instances drove a larger share of travel to destinations than what was observed with other advertising.

ADARA

Date range: 2/1/17-4/3/17. Data is nfinal



WHAT DID WE LEARN FROM TRACKING THE PROMOTION OF THE FINAL FOUR?

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INSIGHTS TO DATE

- Final Four promotional efforts generated a strong ROI with hotel revenues of more than $4.75 M
- Final Four promotional efforts drove travel to destinations across the state
- Bookings influenced by Final Four media had a higher ADR and length of stay than the state average.
- Final Four media drove a stronger share of non-resident travel



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W. P. CAREY SCHOOL of BUSINESS
ARIZONA STATE UNIVERSITY
seidman research institute

THE ECONOMIC IMPACT OF



July 17, 2017

L. William Seidman Research Institute
W. P. Carey School of Business
Arizona State University

Research Team:
Michael Mokwa, John Eaton, Daniel McIntosh,
Christopher Lee, Anthony Evans, and Eva Madly

OVERVIEW

- This study examined the economic impact of the 2017 NCAA Men's Final Four Basketball Championship held April 1 – April 3, 2017 and events surrounding these games. Data collection focused on the time period of Thursday, March 30th through Monday, April 3rd, 2017.

- The study focused on estimating the gross economic impact, or gross output, of the 2017 NCAA Men's Final Four and related events. The total gross economic impact estimate includes the total amount of direct spending by out-of-town visitors and organizations in metro Phoenix, and the indirect and induced impacts of those expenditures (often described as "ripple effects"). This assessment included the impact of both direct and indirect visitor and organizational expenditures in the Valley of the Sun/Greater Phoenix Metropolitan area. No resident spending was included.

- The 2017 NCAA Men's Final Four economic impact estimate was developed using three distinct factors: (1) out-of-town direct visitor spending, (2) organizational spending, and (3) indirect and induced effects. The research team extrapolates from a visitor survey to estimate out-of-town direct visitor spending. Estimates of organizational and media spending are self-reported by the entities in response to requests from the research team.

- The indirect and induced economic impacts of all sources of direct expenditure are calculated using an IMPLAN input-output model customized specifically for the State of Arizona. IMPLAN is a commercially licensed linear model widely used for economic assessment throughout the United States, including impact analyses commissioned by the Arizona Commerce Authority. Estimates of total economic impact are expressed in terms of contributions to gross output, Gross Domestic Product (GDP) and employment in the State of Arizona in 2017. The state, county and city fiscal (tax) impact of NCAA Final Four visitor expenditures is also estimated external to the IMPLAN model.

SURVEY METHODOLOGY

- This study utilized multiple research, survey and analytical methodologies appropriate to the objective and task. Primary data was collected from out-of-town visitors who stated that the main reason for their visit to the Phoenix Metropolitan area was for the 2017 NCAA Men's Final Four and/or events. Teams of trained and supervised students from the W. P. Carey School of Business and Sports Business Association conducted on-site surveys at events over the five day period.

- The sampling plan for data collection included multiple days at multiple sites to sample diverse socio-economic and demographic groups. Within a particular site (e.g. at the stadium on game days) student teams were deployed at varied locations to capture a representative sample (i.e. not all in the sample attended the same parties/events).

- For the purpose of this study, a visitor was defined as any individual who did not classify themselves as living in the greater Phoenix-Metro area or Valley of the Sun for any portion of the year. "Snow Birds" or part-time residents were not considered visitors and as such any respondent that indicated they were staying in the Valley for more than one month was excluded from the final data set. As a result, no resident expenditure is used to generate the economic impact estimates.

KEY FINDINGS

- The estimated total economic impact was $324.5 million.
- An estimated 59,761 visitors came to Arizona for the 2017 NCAA Men's Final Four and stayed an average of 4.16 nights.
- An estimated 300 out-of-town media stayed an average of 5.1 nights.

BREAKDOWN

- The key inputs for this study are illustrated in the following two tables. These were based on the research team's collection and analysis of 973 useable surveys from visitors to the Phoenix metropolitan area, independently-supplied organizational data, and credentialed media.

DIRECT VISITOR & MEDIA EXPENDITURE	NUMBER	AVERAGE DAILY SPENDING	AVERAGE NUMBER OF NIGHTS IN TOWN	TOTAL DIRECT SPENDING
Out-of-Town Visitors excluding Airfare	59,761	$487.19	4.16	$121,118,240
Out-of-Town Media	300	$408.64	5.1	$625,219
Total Visitor & Media Expenditure[1]				**$121,743,459**

Source: Authors' Calculations

ORGANIZATIONAL SPENDING	
Event, Operations and Media Production Spending[2]	$30,741,601
Sponsored Out-of-Town Final Four Events	$7,450,000
Total Organizational Spending	**$38,191,601**

Source: Authors' Calculations

- Direct visitor and media spending was estimated at over $120 million, excluding airfare. When airfare is included, the total visitor and media expenditures are $137 million.

- Organizational spending as captured by reported events, stadium operations, media production, and confirmed spending by outside Arizona firms who produced Championship Game-related events was $38.2 million. No Arizona-based organizational spending was included in the figures.

- Applying these key inputs within the IMPLAN model, the total gross economic impact for the State of Arizona was estimated at $324.5 million. This included all direct, indirect, and induced impacts.

[1] Direct Visitor and Media Expenditures exclude airfare
[2] Spending by the National Organization, traveling teams, the Host Committee, and other media partners

SOURCE OF ECONOMIC IMPACT	GROSS OUTPUT (MILLIONS 2017 $)
Total Final Four Visitor Expenditure Impact	$252.5
Total Media Spending	$1.1
Total Organizational Expenditure Impact	$70.9
Total Economic Impact	**$324.5**

Source: Authors' Calculations

- Visitors to the 2017 NCAA Men's Final Four also generate state and local taxes, including sales tax and the hotel bed tax. These are estimated at more than $11.7 million.

- The distribution of direct fiscal impacts are estimated as follows:

    - City taxes: $4.0 million (34.2% of direct fiscal impact)
    - Maricopa County: $0.9 million (7.7% of direct fiscal impact)
    - State of Arizona: $6.8 million (58.1% of direct fiscal impact)

Table of Contents

Executive Summary i

1. Introduction 1

2. Study Methodology 2

2.1. Survey Respondents 2

2.2. Survey Creation 2

2.3. Sampling and Survey Administration 2

2.4. Surveyor Training 3

2.5. Survey Procedure 3

3. Data Analysis 4

3.1. Estimation of Visitor Numbers 4

3.2. Visitor and Media Expenditure Estimates 5

3.3. Organizational Spending 5

3.4. Indirect and Total Economic Impact 5

4. Final Four Results 6

4.1. Direct Visitor and Media Expenditures 6

4.2. Direct Organizational Expenditures 6

4.3. Induced Economic Impact of Visitor, Media and Organizational Spending 7

4.4. State, County and Local Sales Tax Impact 8

4.5. Total Economic Impact 8

5. Comparison of National Championship Game (2016) to BCS Title Game (2011) 9

Appendix

A.1. Visitor Questionnaire 10

1. Introduction

The 2017 NCAA Men's Final Four was held April 1 – April 3, 2017 in Glendale, Arizona. The W. P. Carey School of Business at Arizona State University was commissioned to conduct an all-inclusive, primary economic impact assessment of the 2017 NCAA Men's Final Four and events surrounding the game. This assessment included the impact of both direct and indirect visitor and organizational expenditures on the regional economy for the Valley of the Sun. No expenditures from Arizona residents were included in this assessment.

This economic impact study utilized multiple research, survey and analytical methodologies appropriate to the objective and task. Teams of trained and supervised students from the ASU Sports Business Association conducted on-site surveys across the Valley over a period of five days, beginning on the Thursday before the Final Four and concluding at the stadium on game day, April 3rd. Approximately 1,000 useable surveys from visitors to the area were collected, scrutinized and analyzed. "Multiplier effects" were calculated to determine the indirect or "ripple" effects. The economic impact from this event can be substantiated to contribute to increases in state and local tax revenues, as well as higher employment levels.

Economic impact was defined and estimated as the increase in spending and therefore economic vitality in a community as a result of the existence of an event or organization. Within the context of the 2017 NCAA Men's Final Four and surrounding events, this included the expenditures of visitors who identified that the Final Four was the key factor in visiting Arizona, media from outside Arizona who cover the event, the "organizational spending" by the Final Four Host Committee, media and event production companies, diverse organizations and businesses involved in games operations, events production and activation of sponsorships, among other organizational activities, plus the indirect and induced multiplier effects. This report will outline the methodologies used and the results obtained in the study and its economic impact.

2. Study Methodology

The economic impact estimate of the 2017 NCAA Men's Final Four was developed using three distinct factors: (1) out of town direct visitor and media spending, (2) organizational spending, and (3) indirect multiplier effects.

2.1. Survey Respondents

The out-of-town direct visitor spending was estimated using the results of an on-site survey administered throughout the weekend prior to the Final Four games on Saturday and the championship game on Monday. The most fundamental factor in estimating visitor spending is how the term visitor is defined. For the purpose of this study a visitor was defined *as any individual who did not classify themselves as living in the greater Phoenix-Metro area or Valley of the Sun for any portion of the year*. "Snow Birds" or part-time residents were **not** considered visitors and, as such, any respondent that indicated they were staying in the Valley for more than one month was excluded from the final data set.

2.2. Survey Creation

The visitor survey was developed through discussions with the Final Four Host Committee as well as a careful review and analysis of past surveys used in related economic impact studies. There were four primary objectives for the survey: (1) determine the role that the Final Four played in the decision to visit the Valley; (2) estimate the total amount an individual and their travel party spent while in the Valley; (3) determine the total number of people in a travel party; and (4) establish the total number of nights a travel party stayed in the Valley.

2.3. Sampling and Survey Administration

The survey was administered by carefully selected, trained and supervised students from the W. P. Carey School of Business at Arizona State University. On average, 8 to 15 students conducted surveys on non-game days. One or more ASU Marketing Department faculty members were designated as supervisors for each data collection effort. A stratified

sampling plan was designed considering diverse time periods and areas to collect data. The days preceding the 2017 NCAA Men's Final Four, the research team deployed teams of surveyors at the Final Four-related events in the Playoff Fan Central in Downtown Phoenix and on site at the University of Phoenix Stadium on the Friday before the first two games. On game days on Saturday and Monday, the research team deployed multiple teams of surveyors to collect data in the areas around the University of Phoenix Stadium where pre-game activities and events occurred, as well as at the entrances to the stadium. On game days, 15-25 students collected data on-site.

2.4. Surveyor Training

Surveyors were competitively selected based on their active participation in the ASU Sports Business Association, willingness to participate and complete training sessions, and ability to adhere to demanding interview schedules and protocols. Many had participated in similar research projects, including Super Bowl XLIX in February, 2015 and the College Football National Championship Game in January, 2016.

Prior to being stationed, each surveyor was given training and precise instructions as to their day's activities. The surveyors were educated about the specific intent and meaning of all of the survey questions to facilitate that accurate data would be obtained. They were trained how to politely and unobtrusively approach prospects and manage encounters with those who participated and those who did not chose to participate. Finally, the definition of a visitor was clearly reinforced. Students practiced data collection before entering the field. Survey teams in the field could contact supervising faculty via cell phone if they had problems or questions during data collection.

2.5. Survey Procedure

Event attendees were approached according to the sampling procedures outlined above. If they agreed to participate, they were screened for resident vs. out-of-town visitor status. Only adult visitors to Arizona were surveyed. In addition, visitors were asked if they were

visiting Arizona primarily to attend the Final Four and/or related events. If the respondent indicated that they were visitors and were visiting because of the Final Four and its related events, the rest of the visitor survey was given. A strong incentive in the form of an official NCAA Final Four lanyard was provided to acknowledge and thank survey participants.

3. Data Analysis

All questionnaires were scrutinized and analyzed for viability and usability. If respondents failed to complete critical parts of the survey or misunderstood key instructions, surveys were rejected. If the survey revealed that respondents were not visiting primarily to see the Final Four, the survey was rejected. After screening questionnaires for data quality, a final sample size of 973 valid visitor surveys was obtained across all events and locales where survey teams were deployed.

Prior to final analysis, the surveys were screened for replies to spending or length of stay questions that were unreasonably high and thus might bias economic impact estimates upward. Such replies were trimmed or simply removed from the analysis.

3.1. Estimation of Visitor Numbers

The research team employed data from the surveys to estimate the proportion of visitors here for the Final Four. Using data from the visitor versus resident tabulators, the research team was able to estimate the proportion of visitors to Arizona at the Final Four games. To estimate the number of visitors with tickets to the game, the research team multiplied the percentage of visitors (derived from survey teams on both game days working the surrounding area and entrances of University of Phoenix stadium) by the official attendance estimates. As a result of this calculation, the research team estimated that the Final Four attracted 59,761 visitors to Arizona.

3.2. Visitor and Media Expenditure Estimates

We calculated the economic impact of the Final Four and related events in a two stage procedure. We first estimated direct visitor spending (the amount of money visitors spent on their trip) and then estimated the total economic impact of that spending as it circulates through the Arizona economy. The estimates of direct visitor expenditures included in this report were computed by calculating the average expenditure per person per day for visitors. This number was scaled to an overall direct expenditure estimate by multiplying it by an estimate of "total visitor days" – that is, the total number of days that all visitors stayed in the Metro Phoenix area as a result of the Final Four or related events.

3.3. Organizational Spending

The organizational spending associated with the Final Four and related events was determined in two parts. First, directed discussions with the Final Four Host Committee, media organizations, and other partners helped to identify expenditures. Second, primary sponsors and event producers provided valuable insight into expenses that were applicable to economic impact analysis. Collectively, this consisted of direct organizational spending in the local community that was infused into the economy exclusively because of the Final Four. These expenditures in the local community related directly to the games and surrounding events were included in the analysis of organizational spending.

3.4. Indirect and Total Economic Impact

In order to determine the cumulative economic impact during the Final Four, it was necessary to identify the amount, infusion and circulation rates of spending. To accomplish this, an IMPLAN input-output model was used to determine the indirect and induced impacts. All expenditures were grouped into distinct categories, the appropriate coefficients were applied, the data was analyzed, and the cumulative effects were determined.

4. Final Four Results

4.1. Direct Visitor and Media Expenditures

Results essential to estimating the economic impact of the Final Four include the total number of visitors, their average stay in nights, and their trip related expenditures. Table 1 reports the number of ticketed visitors (estimated as explained earlier) that came to Arizona primarily for the Final Four or related events. Table 1 also reports the average number of nights visitors reported staying in the Valley.

Table 1: Direct Visitor and Media Expenditures

DIRECT VISITOR & MEDIA EXPENDITURE	NUMBER OF OUT-OF-TOWN VISITORS	AVERAGE DAILY SPENDING	AVERAGE NUMBER OF NIGHTS IN TOWN	TOTAL DIRECT SPENDING
Visitors with Final Four Tickets	59,761	$487.19	4.16	$121,118,240
Out-of-Town Media	300	$408.64	5.1	$625,219
Total Visitor & Media Expenditure[3]				**$121,743,459**

Source: Authors' Calculations

The estimate of the economic impact of visitors drawn by the Final Four was preceded by estimating average daily visitor expenditures. Table 1 shows average daily expenditures on a per visitor basis. Ticketed visitors spent on average an estimated $487.19 per day. Media personnel averaged $408.64.

The total direct spending of visitors to the Final Four is estimated by multiplying the number of visitors by their average stay by their average spending per day. Summing across ticketed visitors and out-of-town media, the total direct spending (direct economic impact) of visitors and media to the Final Four was estimated to be $121.7 million.

4.2. Direct Organizational Expenditures

In addition to visitor expenditures, the Final Four impacted the Arizona economy through

[3] Direct Visitor and Media Expenditures exclude airfare

organizational expenditures. To stage the Final Four and its related events, organizations based outside Arizona spent money in the state on activities including: transportation and lodging of organizational personnel, venue rental, event planning, equipment rental, event staff, catering, entertainment, promotion, and more. The research team included only expenditures made by firms or organizational units from outside Arizona in its estimates. We gathered organizational spending data from the following sources: the Final Four Host Committee, media producers, event sponsors, event planners, venue owners, caterers, and others. Our organizational spending estimates included data reported by the spending of a variety of firms to stage major parties and private events in the days preceding the Final Four. Most firms sharing data with the research team requested that their expenditures be held in confidence. Therefore, we report only an aggregate spending estimate.

Table 2 presents organizational spending as captured by reported Final Four events, stadium operations, media production, and confirmed spending by outside Arizona firms for Final Four-related events. This is estimated at $38.2 million. No Arizona-based organizational spending is included in the figures.

Table 2: Direct Organizational Expenditures

ORGANIZATIONAL SPENDING	
Event, Operations and Media Production Spending[4]	$30,741,601
Sponsored Out-of-Town Final Four Events	$7,450,000
Total Organizational Spending	**$38,191,601**

Source: Authors' Calculations

4.3. Induced Economic Impact of Visitor, Media and Organizational Spending

The next step in estimating the economic impact of the Final Four is to calculate the indirect or induced impact of visitor's spending on the Arizona economy. To calculate this total impact, the IMPLAN economic impact assessment software package was used with SAM multipliers for the Arizona economy. The results provided by the IMPLAN software are shown in Table 3. The

[4] Spending by the National Organization, traveling teams, the Host Committee, and other media partners

numbers in Table 3 show the total gross economic output of ticketed and media visitor spending. Direct visitor spending related to the Final Four was found to be $121.7 million. In total, visitors generated an estimated $252.5 million dollars in economic impact on the Arizona economy (direct plus indirect and induced effects). Out-of-town media spending was $0.6 million. Total gross output for out-of-town media generated an estimated $1.1 million dollars in economic impact on the Arizona economy. We estimate that direct organizational spending brought to Arizona by the Final Four totaled $38.2 million. In turn, this direct spending had an estimated total gross economic impact on the Arizona economy (direct plus indirect and induced effects) of $70.9 million.

Table 3: Total Economic Impact Measured by Direct plus Induced Impact

TOTAL ECONOMIC IMPACT	
Total Final Four Visitor Expenditure Impact	$252.5 million
Total Media Spending	$1.1 million
Total Organizational Expenditure Impact	$70.9 million
Total Economic Impact	**$324.5 million**

Source: Authors' Calculations

4.4. State, County and Local Sales Tax Impact

The direct visitor impact and organizational expenditures associated with the Final Four also contributed to the local and state economy in the form of sales tax revenue. Indirect multiplier effects were not considered when calculating sales tax revenue impacts. The direct sales tax revenue generated from the Final Four was estimated at $11.7 million.

4.5. Total Economic Impact

Adding the direct plus induced impacts across visitors, media and organizational expenditures, the total economic impact that is attributed to the Final Four and its related events is estimated at $324.5 million. This includes an estimated $11.7 million in direct state, local, and county sales tax.

5. Comparison of Super Bowl XLIX, the 2016 CFP National Championship and 2017 NCAA Final Four

Presented next is a brief comparison of the data from three major events recently held in Arizona. The comparisons of these total gross economic impacts for Super Bowl XLIX (2015), the 2016 CFP National Championship Game and the 2017 NCAA Final Four do not take into account the different buying power of the dollars across three years.

Table 4: Comparison of Total Economic Impact of Super Bowl XLIX (2015), 2016 CFP National Championship, and 2017 NCAA Final Four

	SUPER BOWL XLIX (2015 $)	2016 CFP GAME (2016 $)	2017 NCAA FINAL FOUR (2017 $)
Total Economic Impact	**$719,400,000**	**$273,600,000**	**$324,500,000**

Source: Authors' Calculations

Using the Bureau of Labor Statistics Consumer Price Index (BLS CPI) inflation calculator, the Super Bowl XLIX impact expressed in the table above in 2015 dollars had the same buying power as $752.7 million in 2017.[5] The 2016 College Football Playoff National Championship Game expressed in the table above in 2016 dollars had the same buying power as $282.4 million in 2017.[6].

Table 5: Comparison of Total Economic Impact of Super Bowl XLIX (2015), 2016 CFP National Championship, and 2017 NCAA Final Four Translated into 2017 Dollars

COMPARISON IN 2017 DOLLARS	SUPER BOWL XLIX	2016 CFP GAME	2017 NCAA FINAL
Total Economic Impact	**$752,697,330**	**$282,386,020**	**$324,500,000**

Source: Authors' Calculations

[5] http://www.bls.gov/data/inflation_calculator.htm
[6] http://www.bls.gov/data/inflation_calculator.htm

APPENDIX 1 -- Visitor Questionnaire

Official NCAA Final Four Economic Impact Survey

Please help us by completing this
Official NCAA Final Four
Economic Impact Survey

This project is conducted by the W. P. Carey School of Business at Arizona State University with the NCAA to estimate the economic impact of the NCAA Final Four in Phoenix.
We want to know how much you spent or plan to spend on your visit here.

Your replies will be anonymous. We will NOT ask you for your name, phone, e-mail, home address or for any other identifying information.

Please answer **ALL** the questions as accurately as you can, but you are welcome to refuse to answer any question or to stop the survey at any time. If you have any questions or concerns about the study, please contact ASU Professor Michael Mokwa at 480-965-3621. Thanks!

PLEASE CONTINUE
answering questions until you reach the final page. --->

A. YOUR TRAVEL PARTY

1. How many people are in your travel party – the group of family or friends you are traveling with?

_____ people

1a. How many (including yourself) are from outside the Phoenix Metropolitan area?
_____ people

2. How strong of a factor was the NCAA Final Four in your decision to visit the area?

- □ Definitely a primary factor
- □ Somewhat of a factor
- □ Not a factor

3. How many days will you be attending the NCAA Final Four this year? _____ days

4. As a result of attending the NCAA Final Four this year do you intend to return to the Phoenix metropolitan area within the next year for business or leisure? □ Yes □ No

B. YOUR LODGING

1. Please write the number of nights that are you staying in the Phoenix Metro area in the blank below. Write in a "0" if you are not staying overnight.

_____ nights

2. What is your daily rate for lodging? $_____ per night (if staying with someone put 0)

3. Please check your lodging type:

□ Hotel/motel/resort □ RV Park □ Private Home as Guest
□ Rental Apartment or Home □ Didn't stay overnight □ Other
_____

4. Please check the city in which your lodging is located:

□ Glendale □ Goodyear □ Peoria □ Phoenix

□ Scottsdale □ Surprise □ Tempe □ Other _____

PLEASE CONTINUE -->

C. YOUR TRAVEL PARTY'S EXPENDITURES

We would like to ask how much you spent or charged in the 24 hours up to this event in the Valley area. If you plan to be in the Valley less than a day, estimate your actual and planned expenses for whatever time you are here.

As a double check, how many people are in your immediate travel party? _____ people

Please try to estimate the total amount <u>you spent individually per day</u> on each of the following while in town:

Lodging	**$**	**Taxis or limos**	**$**
Breakfast	**$**	**Golf Outings** (including green fees, etc.)	**$**
Lunch	**$**	**Other entertainment & recreation** (excluding Final Four events)	**$**
Dinner	**$**	**Groceries**	**$**
Alcoholic Beverages (not included above)	**$**	**Spending on souvenirs, gifts, etc.** (but not groceries)	**$**
Rental car	**$**	**Other expenditures**	**$**

D. YOUR TRAVEL

1. Did you travel to the Phoenix Metro area by air? □ Yes □ No (If no, skip 1a and 1b)

1a. How many in your travel party also traveled by a commercial airline?

_____ people

1b. About how much did your round-trip ticket cost?

$ _____ per round-trip ticket

2. How many people in your travel party are renting cars locally?

_____ people are renting cars

PLEASE CONTINUE -->

E. ABOUT ORGANIZATIONS THAT HELPED YOU TRAVEL

1. Is any part of your trip to this event part of a tour package? □ Yes □ No (if no, skip 1a & 1b)

1a. What was the total cost of the tour package per person? $ _____ per person

1b. How many in your travel party traveled via the tour package? _____ people

2. Besides a tour company, is any other company or organization paying for all or part of your trip?

□ Yes □ No

3. If "Yes" to either question above, which of the following expenses were paid for by either a tour company or other company or organization that helped pay for your trip? (select all that apply)

□ Lodging □ Airline/Train/Bus Tickets □ Meals and Soft Drinks
□ Local Transportation □ Alcoholic Beverages

F. ABOUT YOU

1. How would you rate your overall experience at the NCAA Final Four?

□ Excellent □ Good □ Average □ Poor

2. Which of the following age group are you a part of?

□ 18-24 □ 25-34 □ 35-49 □ 50 or over

3. Which of the following categories does your household income fall into?

□ Under $40,000 □ $40,000-$59,999 □ $60,000-$79,999
□ 80,000-$99,999 □ $100,000-$149,999 □ $150,000-$249,999
□ $250,000+

4. What is your gender?

□ Male □ Female

5. Which of the following best describes your level of education?

□ High School □ College □ Post-graduate

6. What is your 5-digit zip code of your primary residence? _____

7. Which team are you most a fan of? (Please select only one option)

□ Gonzaga □ North Carolina □ Oregon □ South Carolina □ Other

8. What is your primary affiliation with the NCAA Final Four tournament? (Please select only one option)

□ Alum of a team in the Final Four □ Coach □ Sponsor or affiliated company
□ Casual Fan □ Student □ Other _____

THANK YOU! ***Please return your completed survey to a volunteer.***



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FOR IMMEDIATE RELEASE: June 23, 2015

SUPER BOWL XLIX AND RELATED EVENTS GENERATE AN ECONOMIC IMPACT OF $719.4 MILLION ACCORDING TO STUDY COMPLETED BY ARIZONA STATE UNIVERSITY

Phoenix, AZ - A study completed by the Seidman Research Institute, W.P. Carey School of Business at Arizona State University, determined that Super Bowl XLIX, the 2015 Pro Bowl and related events produced a gross economic impact of **$719.4 million** in the region**.** The announcement was made today at The Governor's Conference on Tourism at the JW Camelback Inn in Scottsdale.

This is the largest economic impact of any special event ever held in the state of Arizona, as well as the highest for any Super Bowl for which publicly released figures are available. By comparison, Super Bowl XLII played at University of Phoenix Stadium in 2008 generated a gross economic impact of $500.6 million (2008 dollars) based on research also conducted by the W.P. Carey School of Business.

"This is tremendous news for our economy and a strong testament to the exceptional work of everyone involved," said Arizona Governor **Doug Ducey.** "The eyes of the world were on Arizona, and we delivered in a big way. I look forward to our state hosting many more successful championship games and major events in the future."

Commissioned by the Arizona Commerce Authority in partnership with the Arizona Super Bowl Host Committee, the study focused on the nine-day period from January 24th through February 1, 2015 coinciding with the Pro Bowl and Super Bowl which were played at University of Phoenix Stadium on January 25 and February 1, respectively.

The gross economic impact is defined as the direct amount of spending by visitors and organizations arriving from outside the state to participate in or create events directly related to the Super Bowl, as well as the indirect and induced impacts of those expenditures, often described as "ripple effects." Resident and local business spending was not included.

To gather data about spending and duration of stay from visitors, on-site surveys were conducted at events around the Valley over the nine day period by teams of trained individuals from the W. P. Carey School of Business. Data was collected from out-of-town visitors who stated that the main reason for their visit to the Phoenix Metropolitan area was for the Super Bowl, Pro Bowl and/or associated events. The data was collected across multiple days at multiple sites to sample diverse socio-economic and demographic groups.

The indirect and induced economic impacts were calculated using an IMPLAN (IMpact analysis for PLANning) model originally developed by the University of Minnesota. This commercially licensed linear input-output model is widely used for economic assessment throughout the United States and is populated with local, regional and state data for Arizona.

Other findings from the Seidman Research Institute at W.P. Carey School of Business report:

- An estimated 121,775 visitors came to Arizona for Super Bowl XLIX and/or the 2015 Pro Bowl; those visitors stayed an average of 3.99 nights.
- An estimated 5,033 out-of-town media members came to Arizona and stayed an average of 7.1 nights (up from 4.1 nights for Super Bowl XLII in 2008).
- The $719.4 million economic impact for Super Bowl XLIX represents an increase of 30.8% over Super Bowl XLII in Arizona (adjusted using the Bureau of Labor Statistics Consumer Price Index, or BLS CPI, inflation calculator which expressed that the 2008 economic impact dollars have the same buying power as $550.1 million in 2015).

Previously released data relative to the success of Super Bowl XLIX include the following:

- Broadcast by NBC, Super Bowl XLIX was the most-watched program in the history of American television with 114.4 million average viewers.
- More than 1,000,000 people visited Verizon Super Bowl Central in downtown Phoenix and 500,000 people enjoyed events in downtown Scottsdale during the week
- Verizon Super Bowl Central was the first reduced waste event of its size at a Super Bowl; the Kick the Waste Initiative resulted in 73% diversion rate from landfill to recycling.
- 177,000 people attended the NFL Experience, a record attendance at the Phoenix Convention Center.
- On the day before Super Bowl XLIX, 126,000 people rode Valley Metro Light Rail, doubling the previous single-day high. Throughout the week, Light Rail ridership totaled 389,500 (also a record).
- Sky Harbor Airport served 175,000 passengers the day after Super Bowl, a single day record for Sky Harbor.
- Super Bowl XLIX was televised live in more than 170 countries and territories. More than 23 countries provided on-site coverage from Arizona and the game was broadcast in nine languages from University of Phoenix Stadium (Mandarin Chinese, Danish, English, French, German, Hungarian, Japanese, Portuguese, and Spanish).
- Arizona was the first host community to offer a website and social media in Spanish and to create cross-border partnerships with Mexico business and tourism entities.
- More than 100 stations broadcast live from Radio Row at the Super Bowl Media Center in downtown Phoenix.
- Legacy Grant Funds in excess of $2 million were awarded to 27 Arizona non-profits to benefit over 400,000 kids; this was made possible by sponsors of the Super Bowl Host Committee, the Arizona Cardinals and the NFL.

Press Contact:

Mark Dalton, Arizona Cardinals, 602-379-1720 or mdalton@cardinals.nfl.net

W. P. CAREY SCHOOL of BUSINESS
ARIZONA STATE UNIVERSITY
seidman research institute

THE ECONOMIC IMPACT OF



April 13, 2016

L. William Seidman Research Institute
W. P. Carey School of Business
Arizona State University

Research Team:
Michael Mokwa, Daniel McIntosh, John Eaton,
Anthony Evans, and Kent Hill

OVERVIEW

- This study examined the economic impact of the 2016 College Football Playoff National Championship Game held on January 11, 2016 and events surrounding these games. Data collection focused on the time period of January 9th through January 11th, 2016.

- The study focused on estimating the gross economic impact of the 2016 College Football Playoff National Championship Game and related events. This was defined as the direct amount of spending by visitors and organizations from outside the state, and the indirect and induced impacts of those expenditures (often described as "ripple effects"). This assessment included the impact of both direct and indirect visitor and organizational expenditures in the Valley of the Sun/Greater Phoenix Metropolitan area. No resident spending was included.

- The 2016 College Football Playoff National Championship Game economic impact estimate was developed using three distinct factors: (1) out-of-state direct visitor spending; (2) organizational spending; and (3) indirect and induced effects.

- Indirect and induced economic impacts were calculated with an IMPLAN input-output model using SAM multipliers for the State of Arizona. IMPLAN (IMpact analysis for PLANning) is widely used for economic assessment throughout the United States, including impact analyses commissioned by the Arizona Commerce Authority. It is a commercially licensed linear input-output model based on local, regional and state multiplier models. The specific model used for this study has been designed for use in Arizona.

SURVEY METHODOLOGY

- This study utilized multiple research, survey and analytical methodologies appropriate to the objective and task. Primary data was collected from out-of-town visitors who stated that the main reason for their visit to the Phoenix Metropolitan area was for the 2016 College Football Playoff National Championship Game and/or events associated with the game. Teams of trained and supervised students from the ASU W. P. Carey School of Business and Sports Business Association conducted on-site surveys at events around the Valley over the 3-day period.

- The sampling plan for data collection included multiple days at multiple sites to sample diverse socio-economic and demographic groups. Within a particular site (e.g. at the stadium on game days) student teams were deployed at varied locations to capture a representative sample (i.e. not all in the sample attended the same parties/events).

- For the purpose of this study, a visitor was defined as any individual who did not classify themselves as living in the greater Phoenix-Metro area or Valley of the Sun for any portion of the year. "Snow Birds" or part-time residents were not considered visitors and, as such, any respondent that indicated they were staying in the Valley for more than one month was excluded from the final data set.

KEY FINDINGS

- The estimated total economic impact was $273.6 million.
- An estimated 65,401 visitors came to Arizona for the 2016 College Football Playoff National Championship Game and stayed an average of 3.88 nights.
- An estimated 610 out-of-town media stayed an average of 4.3 nights.

BREAKDOWN

- The key inputs for this study are illustrated in the following two tables. These were based on the research team's collection and analysis of 864 useable surveys from visitors to the Phoenix metropolitan area, independently-supplied organizational data, and credentialed media.

DIRECT VISITOR & MEDIA EXPENDITURE	NUMBER	AVERAGE DAILY SPENDING	AVERAGE NUMBER OF NIGHTS IN TOWN	TOTAL DIRECT SPENDING
Visitors with Champ Game Tickets	62,127	$467.93	3.94	$114,547,165
Visitors without Game Tickets	3,274	$523.93	2.77	$4,745,619
Out-of-State Media	610	$428.64	4.3	$1,124,323
Total Visitor & Media Expenditure[1]				**$120,417,107**

Source: Authors' Calculations

ORGANIZATIONAL SPENDING	
Event, Operations and Media Production Spending[2]	$35,935,310
Sponsored Out-of-State Championship Game Events	$2,980,000
Total Organizational Spending	**$38,915,310**

Source: Authors' Calculations

- Out-of-state visitors were divided into three groups: those with Championship Game tickets, those without, and media.

- Direct visitor and media spending was estimated at over $120 million.

- Organizational spending was nearly $39 million. This consisted of reported events, stadium operations, media production, and confirmed spending by outside Arizona firms who produced

[1] Direct Visitor and Media Expenditures exclude airfare
[2] Spending by the National Organization, traveling teams, the Host Committee, and other media partners

Championship Game-related events. No Arizona-based organizational spending was included in the figures.

- Applying these key inputs within the IMPLAN model, the total gross economic impact for the State of Arizona was estimated at $273.6 million. This included all direct, indirect, and induced impacts.

TOTAL ECONOMIC IMPACT	
Total Champ Game Ticketed Visitor Expenditure Impact	$212.6 million
Total Non-Champ Game Ticketed Visitor Expenditure Impact	$8.1 million
Total Media Spending	$1.7 million
Total Organizational Expenditure Impact	$51.2 million
Total Economic Impact	**$273.6 million**

Source: Authors' Calculations

- A comparison of total gross economic impacts for the 2011 BCS Championship Game and the 2016 College Football Playoff National Championship Game in the State of Arizona is shown below. However, this does not take into account the different buying power of the dollars in both years.

COMPARISON OF 2011 BCS AND 2016 CFP NATIONAL CHAMPIONSHIP GAME TOTAL ECONOMIC IMPACT	2011 BCS GAME (2011 $)	2016 CFP NATIONAL CHAMP GAME (2016 $)
Total Visitor Spending Impact	$188,000,000	$220,700,000
Total Media and Organizational Expenditure Impact	$16,550,000	$52,900,000
Total Economic Impact	**$204,550,000**	**$273,600,000**

Source: Authors' Calculations

- Using the Bureau of Labor Statistics Consumer Price Index (BLS CPI) inflation calculator, the 2011 BCS Championship Game impact expressed in the table above in 2011 dollars had the same buying power as $215.6 million in 2016.[3] This suggests that the total gross economic impact of visitors, media and non-Arizona based organizational expenditure for the 2016 College Football Playoff National Championship Game was at least **26.8% greater** than the impact for the 2011 BCS game.

- The direct state, local and county sales tax revenue generated from the 2016 College Football Playoff National Championship Game was estimated at **$12.2 million.**

[3] http://www.bls.gov/data/inflation_calculator.htm

Table of Contents

Executive Summary i

1. Introduction 1

2. Study Methodology 2

2.1. Survey Respondents 2

2.2. Survey Creation 2

2.3. Sampling and Survey Administration 2

2.4. Surveyor Training 3

2.5. Survey Procedure 3

3. Data Analysis 4

3.1. Estimation of Visitor Numbers 4

3.2. Visitor and Media Expenditure Estimates 5

3.3. Organizational Spending 5

3.4. Indirect and Total Economic Impact 6

4. National Championship Game Results 6

4.1. Direct Visitor and Media Expenditures 6

4.2. Direct Organizational Expenditures 7

4.3. Induced Economic Impact of Visitor, Media and Organizational Spending 8

4.4. State, County and Local Sales Tax Impact 9

4.5. Total Economic Impact 9

5. Comparison of National Championship Game (2016) to BCS Title Game (2011) 9

Appendix

A.1. Visitor Questionnaire 11

1. Introduction

The 2016 College Football Playoff National Championship Game was held on January 11, 2016 in Glendale, Arizona. The W. P. Carey School of Business at Arizona State University was commissioned to conduct an all-inclusive, primary economic impact assessment of the College Football Playoff National Championship Game and events surrounding the game. This assessment included the impact of both direct and indirect visitor and organizational expenditures on the regional economy for the Valley of the Sun. No expenditures from Arizona residents or Arizona organizations were included in this assessment.

This economic impact study utilized multiple research, survey and analytical methodologies appropriate to the objective and task. Teams of trained and supervised students from the ASU Sports Business Association conducted on-site surveys across the Valley over a period of three days, beginning on the Saturday before the National Championship Game and concluding at the stadium on game day, January 11th. Approximately 1,000 useable surveys from visitors to the area were collected, scrutinized and analyzed. "Multiplier effects" were calculated to determine the indirect or "ripple" effects. The economic impact from this event can be substantiated to contribute to increases in state and local tax revenues, as well as higher employment levels.

Economic impact was defined and estimated as the increase in spending in a community as a result of the existence of an event or organization. Within the context of the College Football Playoff National Championship Game and surrounding events, this included the expenditures of visitors who identified that the National Championship Game was the key factor in visiting Arizona; media from outside Arizona who cover the event; the "organizational spending" by the National Championship Game Host Committee, media and event production companies; diverse organizations and businesses involved in games operations, events production and activation of sponsorships, among other organizational activities; plus the indirect and induced multiplier effects. This report will outline the methodologies used and the results obtained in the study and its economic impact.

2. Study Methodology

The economic impact estimate of the National Championship Game was developed using three distinct factors: (1) out of town direct visitor and media spending; (2) organizational spending; and (3) indirect multiplier effects.

2.1. Survey Respondents

The out-of-town direct visitor spending was estimated using the results of an on-site survey administered throughout the weekend prior to as well as the day of the National Championship Game. The most fundamental factor in estimating visitor spending is how the term visitor is defined. For the purpose of this study a visitor was defined *as any individual who did not classify themselves as living in the greater Phoenix-Metro area or Valley of the Sun for any portion of the year*. "Snow Birds" or part-time residents were **not** considered visitors and, as such, any respondent that indicated they were staying in the Valley for more than one month was excluded from the final data set.

2.2. Survey Creation

The visitor survey was developed through discussions with the National Championship Game Host Committee, as well as a careful review and analysis of past surveys used in related economic impact studies. There were four primary objectives for the survey: (1) determine the role that the National Championship Game played in the decision to visit the Valley; (2) estimate the total amount an individual and their travel party spent while in the Valley; (3) determine the total number of people in a travel party; and (4) establish the total number of nights a travel party stayed in the Valley.

2.3. Sampling and Survey Administration

The survey was administered by carefully selected, trained and supervised students from the W. P. Carey School of Business at Arizona State University. On average, 8 to 15 students conducted surveys on non-game days. One or more faculty members were designated as

supervisors for each data collection effort. A stratified sampling plan was designed considering diverse time periods and areas to collect data. The weekend preceding the National Championship Game, the research team deployed teams of surveyors at the National Championship Game-related events in the Playoff Fan Central in Downtown Phoenix. On game day, the research team deployed multiple teams of surveyors to collect data in the areas around the University of Phoenix stadium where pre-game activities and events occurred, as well as at the entrances to the stadium. On game day, 29 students collected data on-site.

2.4. Surveyor Training

Surveyors were competitively selected based on their active participation in the ASU Sports Business Association, willingness to participate and complete training sessions, and ability to adhere to demanding interview schedules and protocols. Many had participated in similar research projects, including Super Bowl XLIX in February, 2015.

Prior to being stationed, each surveyor was given training and precise instructions as to their day's activities. The surveyors were educated about the specific intent and meaning of all of the survey questions to facilitate that accurate data would be obtained. They were trained how to politely and unobtrusively approach prospects and manage encounters with those who participated and those who did not chose to participate. Finally, the definition of a visitor was clearly reinforced. Students practiced data collection before entering the field. Survey teams in the field were also able to contact supervising faculty via cell phone whenever any problems or questions arose during the data collection.

2.5. Survey Procedure

Event attendees were approached according to the sampling procedures outlined above. If they agreed to participate, they were screened for resident vs. out-of-state visitor status. Only adult visitors to Arizona were surveyed. In addition, visitors were asked if they were visiting Arizona primarily to attend the National Championship Game and/or related events.

If the respondent indicated that they were visitors and were visiting because of the National Championship Game and its related events, the rest of the visitor survey was given. A strong incentive in the form of an official National Championship Game lanyard was provided to acknowledge and thank survey participants.

3. Data Analysis

All questionnaires were scrutinized and analyzed for viability and usability. If respondents failed to complete critical parts of the survey or misunderstood key instructions, surveys were rejected. If the survey revealed that respondents were not visiting primarily to see the National Championship Game, the survey was rejected. After screening questionnaires for data quality, a final sample size of 864 valid visitor surveys was obtained across all events and locales where survey teams were deployed. This sample included 822 visitors who reported having tickets to the National Championship Game and 42 visitors who did not report having tickets.

Prior to final analysis, the surveys were screened for replies to spending or length of stay questions that were unreasonably high and thus might bias economic impact estimates upward. Such replies were trimmed or simply removed from the analysis.

3.1. Estimation of Visitor Numbers

The research team employed data from the surveys to estimate the proportion of visitors here for the National Championship Game who had tickets and the proportion which did not. Using data from the visitor versus resident tabulators, the research team was able to estimate the proportion of visitors to Arizona at the National Championship Game. To estimate the number of visitors with tickets to the game, the research team multiplied the percentage of visitors (derived from survey teams on game day working the surrounding area and entrances of University of Phoenix stadium) by the official attendance estimate. As a result of this calculation, the research team estimated that the National Championship Game attracted 62,127 visitors to Arizona with tickets to the National Championship Game.

To estimate the proportion of visitors without tickets to the National Championship Game who were nevertheless drawn to Arizona to partake in related parties and events, the team estimated the proportion of people at surveyed events who said they 1) were here primarily for the National Championship Game or related events, and 2) who said they did not have tickets to the National Championship Game. Using the proportion of non-ticketed visitors at target events, along with attendance estimates for these events, we estimated the number of visitors in Arizona primarily for the National Championship Game or related events to be 3,274. Together, 65,401 visitors are estimated to have stayed in Arizona for the National Championship Game and related events.

3.2. Visitor and Media Expenditure Estimates

We calculated the economic impact of the National Championship Game related events in a two stage procedure. We first estimated direct visitor spending (the amount of money visitors spent on their trip) and then estimated the total economic impact of that spending as it circulated through the Arizona economy. The estimates of direct visitor expenditures included in this report were computed by calculating the average expenditure per person per day for visitors. To provide a more robust estimate, we separated visitors into two segments; those with and those without National Championship Game tickets. This number was scaled to an overall direct expenditure estimate by multiplying it by an estimate of "total visitor days" – that is, the total number of days that all visitors stayed in the Metro Phoenix area as a result of the National Championship Game or related events.

3.3. Organizational Spending

The organizational spending associated with the National Championship Game and related events was determined in two parts. First, directed discussions with the National Championship Game Host Committee, media organizations, and other partners helped to identify expenditures. Second, primary sponsors and event producers provided valuable insight into expenses that were applicable to economic impact analysis. Collectively, this

consisted of direct organizational spending in the local community that was infused into the economy exclusively because of the National Championship Game. Any expenditure in the local community related directly to the games and surrounding events were included in the analysis of organizational spending.

3.4. Indirect and Total Economic Impact

In order to determine the cumulative economic impact during the National Championship Game, it was necessary to identify the amount, infusion and circulation rates of spending. To accomplish this, an IMPLAN input-output model was used to determine the indirect and induced impacts. All expenditures were grouped into distinct categories, the appropriate coefficients were applied, the data was analyzed, and the cumulative effects were estimated.

4. National Championship Game Results

4.1. Direct Visitor and Media Expenditures

Results essential to estimating the economic impact of the National Championship Game include the total number of visitors, their average stay in nights, and their trip related expenditures. These data are reported for ticketed and non-ticketed visitors in the sections below. Table 1 reports the number of ticketed and non-ticketed visitors (estimated as explained earlier) that came to Arizona primarily for the National Championship Game or related events. Table 1 also reports the average number of nights each class of visitor reported staying in the Valley.

Table 1: Direct Visitor and Media Expenditures

DIRECT VISITOR & MEDIA EXPENDITURE	NUMBER OF OUT-OF-TOWN VISITORS	AVERAGE DAILY SPENDING	AVERAGE NUMBER OF NIGHTS IN TOWN	TOTAL DIRECT SPENDING
Visitors with Champ Game Tickets	62,127	$467.93	3.94	$114,547,165
Visitors without Game Tickets	3,274	$523.93	2.77	$4,745,619
Out-of-State Media	610	$428.64	4.3	$1,124,323
Total Visitor & Media Expenditure[4]				**$120,417,107**

Source: Authors' Calculations

The estimate of the economic impact of visitors drawn by the National Championship Game was preceded by estimating average daily visitor expenditures. Table 1 shows average daily expenditures on a per visitor basis for ticketed and non-ticketed visitors. Ticketed visitors spent on average an estimated $467.93 per day while non-ticketed visitors spent on average an estimated $523.93 per day. Media personnel averaged $428.64.

The total direct spending of visitors to the National Championship Game was estimated by multiplying the number of visitors by their average stay by their average spending per day. Summing across ticketed visitors, non-ticketed visitors, and out-of-town media, the total direct spending (direct economic impact) of visitors and media to the National Championship Game was estimated to be $120.4 million.

4.2. Direct Organizational Expenditures

In addition to visitor expenditures, the National Championship Game impacted the Arizona economy through organizational expenditures. To stage the National Championship Game and its related events, organizations based outside Arizona spent money in the state on activities including: transportation and lodging of organizational personnel, venue rental, event planning, equipment rental, event staff, catering, entertainment, promotion, and more. The research team included only expenditures made by firms or organizational units from outside Arizona in its estimates. We gathered organizational spending data from the following

[4] Direct Visitor and Media Expenditures exclude airfare

sources: the National Championship Game Host Committee, media producers, event sponsors, event planners, venue owners, caterers, and others. Our organizational spending estimates included data reported by the spending of a variety of firms to stage major parties and private events in the days preceding the National Championship Game. Most firms sharing data with the research team requested that their expenditures be held in confidence. Therefore, we report only an aggregate spending estimate.

Table 2 presents organizational spending as captured by reported National Championship Game events, stadium operations, media production, and confirmed spending by outside Arizona firms for National Championship Game-related events. This was estimated at $38.9 million. No Arizona-based organizational spending was included in the figures.

Table 2: Direct Organizational Expenditures

ORGANIZATIONAL SPENDING	
Event, Operations and Media Production Spending[5]	$35,935,310
Sponsored Out-of-State Championship Game Events	$2,980,000
Total Organizational Spending	**$38,915,310**

Source: Authors' Calculations

4.3. Induced Economic Impact of Visitor, Media and Organizational Spending

The next step in estimating the economic impact of the National Championship Game was to calculate the indirect or induced impact of visitor's spending on the Arizona economy. To calculate this total impact, the IMPLAN economic impact assessment software package was used with SAM multipliers for the Arizona economy. The results provided by the IMPLAN software are shown in Table 3. The numbers in Table 3 show the total economic impact (direct, indirect and induced impacts) of ticketed, non-ticketed and media visitor spending. Direct visitor spending related to the National Championship Game was found to be $120.4 million. In total, visitors generated an estimated $222.4 million dollars in economic impact on the Arizona economy (direct plus indirect and induced effects). We estimate that direct organizational

[5] Spending by the National Organization, traveling teams, the Host Committee, and other media partners

spending brought to Arizona by the National Championship Game totaled $38.9 million. In turn, this direct spending had an estimated *total* economic impact on the Arizona economy (direct plus indirect and induced effects) of $51.2 million.

Table 3: Total Economic Impact Measured by Direct plus Induced Impact

TOTAL ECONOMIC IMPACT	
Total Champ Game Ticketed Visitor Expenditure Impact	$212.6 million
Total Non-Champ Game Ticketed Visitor Expenditure Impact	$8.1 million
Total Media Spending	$1.7 million
Total Organizational Expenditure Impact	$51.2 million
Total Economic Impact	**$273.6 million**

Source: Authors' Calculations

4.4. State, County and Local Sales Tax Impact

The direct visitor impact and organizational expenditures associated with the National Championship Game also contributed to the local and state economy in the form of sales tax revenue. Indirect multiplier effects were not considered when calculating sales tax revenue impacts. The direct sales tax revenue generated from the National Championship Game was estimated at $12.2 million.

4.5. Total Economic Impact

Adding the direct, indirect and induced impacts across visitors, media and organizational expenditures, the total economic impact that is attributed to the National Championship Game and its related events was estimated at $273.6 million. This includes an estimated $12.2 million in direct state, local, and county sales tax.

5. Comparison of the National Championship Game (2016) to the BCS Championship Game (2011)

Presented next is a brief comparison of the data from the previous two college football national championship games held in Arizona. The comparisons of these total gross economic impacts

for the 2016 National Championship Game and the 2011 BCS Championship Game do not take into account the different buying power of the dollars in both years as all dollar figures referring to the 2011 BCS Championship Game in Table 4 are shown in 2011 dollars.

Table 4: Total Economic Impact

COMPARISON OF 2011 BCS AND 2016 CFP NATIONAL CHAMPIONSHIP GAME TOTAL ECONOMIC IMPACT	2011 BCS GAME (2011 $)	2016 CFP NATIONAL CHAMP GAME (2016 $)
Total Visitor Spending Impact	$188,000,000	$220,700,000
Total Media and Organizational Expenditure Impact	$16,550,000	$52,900,000
Total Economic Impact	**$204,550,000**	**$273,600,000**

Source: Authors' Calculations

Using the Bureau of Labor Statistics Consumer Price Index (BLS CPI) inflation calculator, the 2011 BCS Championship Game impact expressed in the table above in 2011 dollars had the same buying power as $215.6 million in 2016.[6] This suggests that the total gross economic impact of visitors, media and non-Arizona based organizational expenditure for the 2016 College Football Playoff National Championship Game was at least **26.8% greater** than the impact for the 2011 BCS game.

[6] http://www.bls.gov/data/inflation_calculator.htm

APPENDIX 1 -- Visitor Questionnaire

2016 COLLEGE FOOTBALL PLAYOFF

Visitors to the Phoenix Area

Please help us by completing this

Official College Football Playoff Economic Impact Survey

through the W. P. Carey School at Arizona State University and the Arizona Organizing Committee

We want to know how much you spent or plan to spend on your visit to help us estimate the economic impact of the 2016 College Football Playoff National Championship Game.

Your replies will be anonymous.

We will NOT ask you for your name, phone, e-mail, home address or for any other identifying information.

Please answer ALL questions as accurately as you can. You can refuse to answer any question or stop the survey at any time.

Thanks!

If you have any questions or concerns about the study, please contact the Department of Marketing at 480-965-3621.

ASU® W. P. CAREY SCHOOL of BUSINESS

ARIZONA STATE UNIVERSITY

A. General Information

1. Please check which of the events below would be important reasons for your visit to the Phoenix Metro area. You can check more than one event.

- ❑ College Football Playoff National Championship Game
- ❑ Events related to the College Football Playoff National Championship Game
- ❑ Fiesta Bowl
- ❑ Cactus Bowl
- ❑ Events related to the Fiesta/Cactus Bowl
- ❑ None of the events just listed

2. Of the events above, which is the **MOST** important reason for your visit?

- ❑ College Football Playoff National Championship Game
- ❑ Events related to the College Football Playoff National Championship Game
- ❑ Fiesta Bowl
- ❑ Cactus Bowl
- ❑ Events related to the Fiesta/Cactus Bowl
- ❑ None of the events just listed

B. Your Travel Party

1. **How many people are in your travel party** – the group of family or friends you are traveling with?	_____ people
2. Of the people in your travel party (including yourself), how many are from outside the Phoenix Metropolitan area?	_____ people
3. Of the people in your travel party (including yourself), how many have tickets to the **College Football Playoff National Championship Game**?	_____ people
4. Do you personally have tickets to the **College Football Playoff National Championship Game**?	❑ Yes ❑ No

C. Your Lodging

1. Please write the number of nights that are you staying in the Phoenix Metro area. Write in a "0" if you are not staying overnight. _____ nights

2. Are you paying for your lodging or are you staying somewhere for free?

❑ Staying Free

❑ Paying for Lodging*

*If you are paying for lodging, what is your daily rate? $_____ per night

3. Please check the city in which your lodging is located:

❑ Ahwatukee	❑ Glendale	❑ Scottsdale
❑ Avondale	❑ Litchfield Park	❑ Sedona
❑ Cave Creek	❑ Mesa	❑ Sun City
❑ Chandler	❑ Paradise Valley	❑ Surprise
❑ Flagstaff	❑ Peoria	❑ Tempe
❑ Gilbert	❑ Phoenix	❑ Tucson

❑ Other (please write-in): _____

D. Your Travel

1. Did you travel to the Phoenix Metro area by an airline, train, or bus line?

❑ Yes ❑ No (**If no**, skip "**a**" and "**b**" below)

a. How many in your travel party also traveled by a commercial airline, train, or bus line?

_____ people

b. About how much did your round-trip ticket cost?

$ _____ per round-trip ticket

2. How many people in your travel party are renting cars locally?

_____ people are renting cars

E. About Organizations that Helped You Travel

1. Is any part of your trip to this event part of a tour package?

   ❑ Yes ❑ No (**If no**, skip "**a**" and "**b**" below)

   a. What was the total cost of the tour package per person?

   $ _____ per person

   b. How many in your party traveled via the tour package?

   _____ people

2. Beside a tour company, is any other company or organization paying for all or part of your trip?

   ❑ Yes ❑ No

   If "Yes" to either question above, which of the following expenses was paid for by either a tour company or other company or organization that helped pay for your trip? (**select all that apply**)

   ❑ Lodging
   ❑ Meals and Soft Drinks
   ❑ Alcoholic Beverages
   ❑ Airline/Train/Bus Line Tickets
   ❑ Local Transportation

F. Your Travel Party's Expenditures

We would like to ask how much you (and those in your travel party, if any) **spent or charged in the 24 hours up to this event in the Phoenix area**. If you plan to be in the Phoenix area less than a day, estimate your actual and planned expenses for whatever time you are here.

For example, if there are four people in your travel party and you each spent $10 on lunch, you would list $40 (4 X $10) for lunch.

For example, if there are 2 people in your travel party and you share a room, you would list the daily rate for one room.

1. As a double check, how many people are in your immediate travel party? _____ people

2. Please try to estimate the total amount **you spent individually per day** on each of the following while in town:

$_____	Lodging
$_____	Dinner
$_____	Lunch
$_____	Breakfast
$_____	Alcoholic Beverages (not included above)
$_____	Rental car (daily rate plus insurance charges)
$_____	Taxis or limos
$_____	Golf Outings (including green fees, cart rental, etc.)
$_____	Other entertainment or recreation (excluding game tickets)
$_____	Groceries
$_____	Spending on souvenirs, gifts, etc. (but not groceries)
$_____	Other expenditures

G. About You

1. Which of the following age groups are you a part of?

❑ 18-24 ❑ 25-34 ❑ 35-49 ❑ Over 50 ❑ Prefer not to answer

2. Which of the following categories does your household income fall into?

❑ $0-$49,999 ❑ $50,000-$99,999
❑ $100,000+ ❑ Prefer not to answer

3. Is your current long-term residence located inside or outside Arizona?

❑ Inside Arizona ❑ Outside Arizona

4. Which team are you most a fan of?

❑ Alabama ❑ Clemson ❑ Neither

5. What is your gender?

❑ Male ❑ Female ❑ Prefer not to answer

Thank you! Please return this survey to the volunteer.



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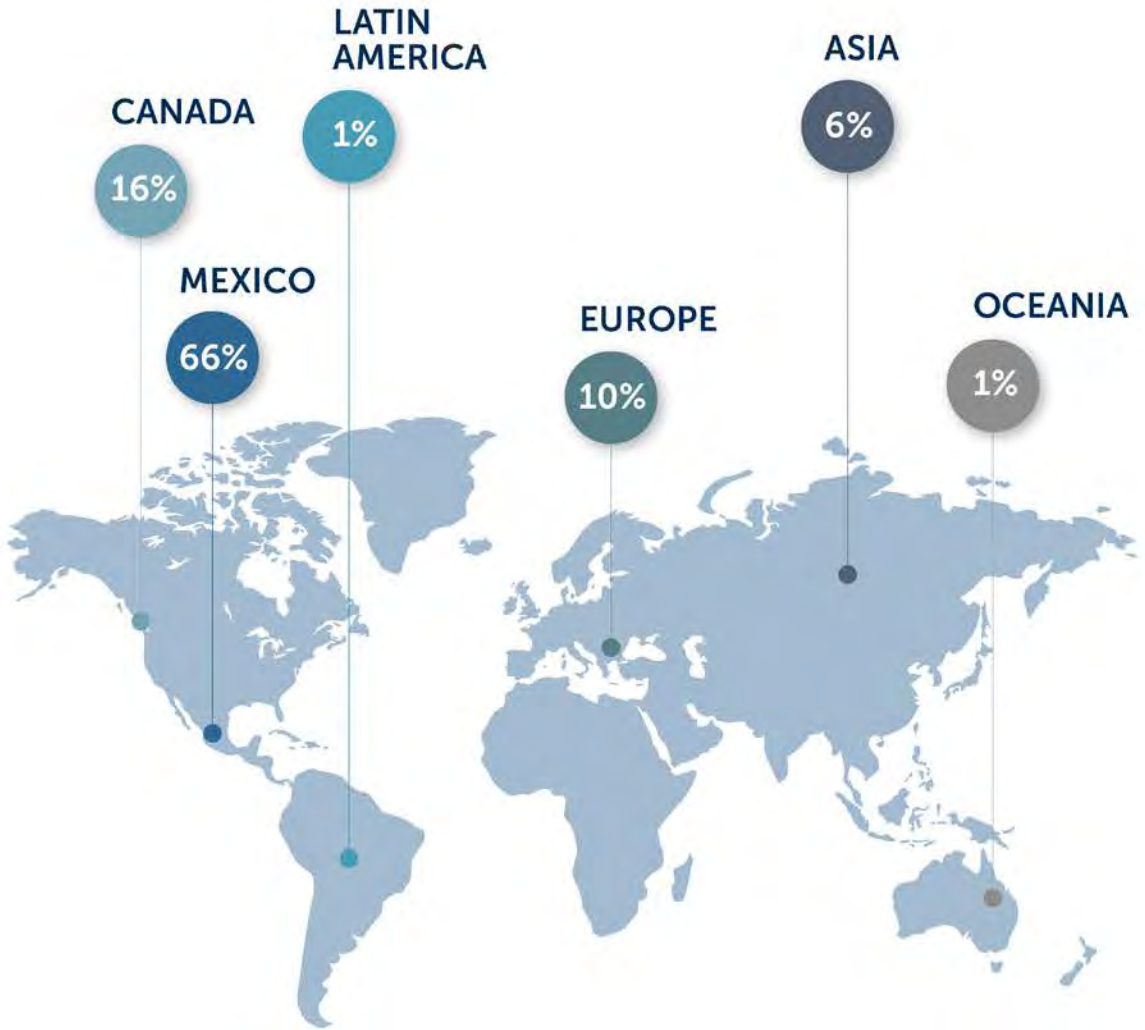
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INTERNATIONAL VISITATION



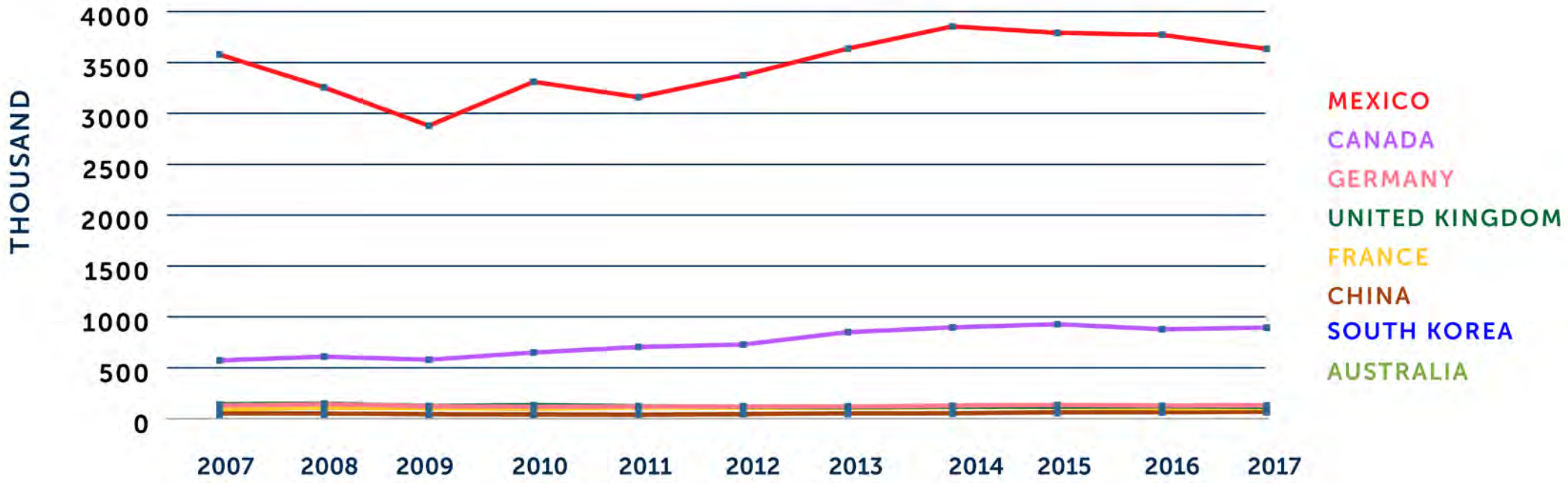
INTERNATIONAL VISITATION

5,565,000 OVERNIGHT VISITS IN 2017



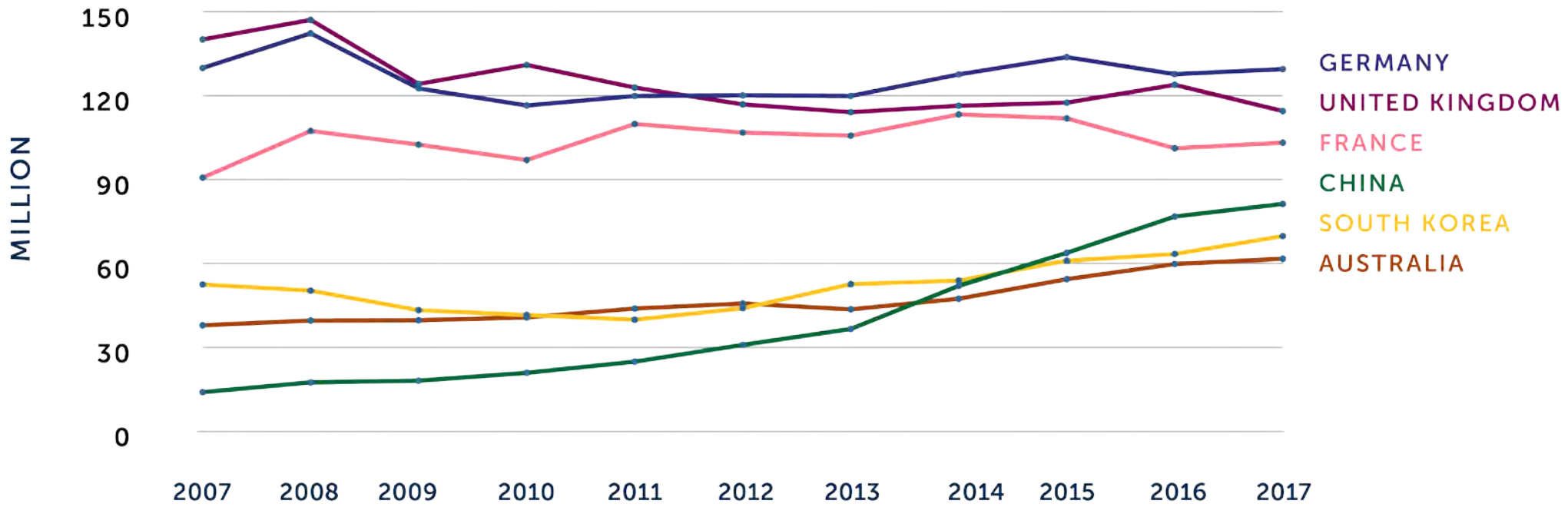
Source: Tourism Economics, 2017

INTERNATIONAL OVERNIGHT VISITS TO ARIZONA



Source: Tourism Economics, 2017

INTERNATIONAL OVERNIGHT VISITS TO ARIZONA



Source: Tourism Economics, 2017







International Visitor Volumes for Arizona:

2017 Analysis

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Overview

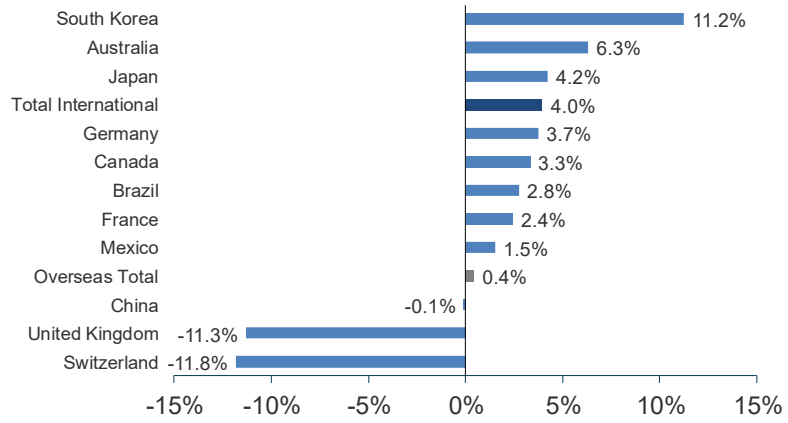
- An understanding of the volumes and trends of key international markets is critical to sound destination marketing.
- However, government data does not provide adequate sample sizes to produce reliable estimates of international markets for Arizona.
- Tourism Economics has developed an international visitor tracking model for Arizona that incorporates multiple data sources to produce reliable volumes and trends for 49 international markets.
- The model weights aviation (OAG bookings by origin and destination), credit card statistics (Visa cardholders by country of origin), and various government databases to stabilize results over time.
- Weights are based on historic correlations with government data over time.

International travel to Arizona, VisaVue vs OAG

VisaVue

International Visits to Arizona

% Change, 2017

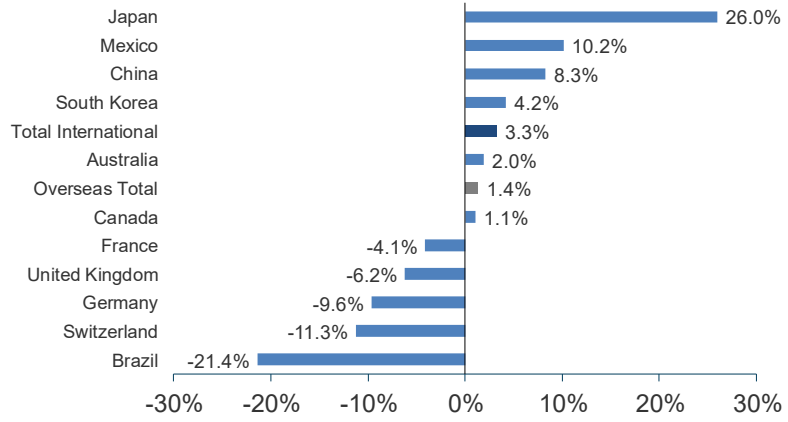


Source: VisaVue

OAG

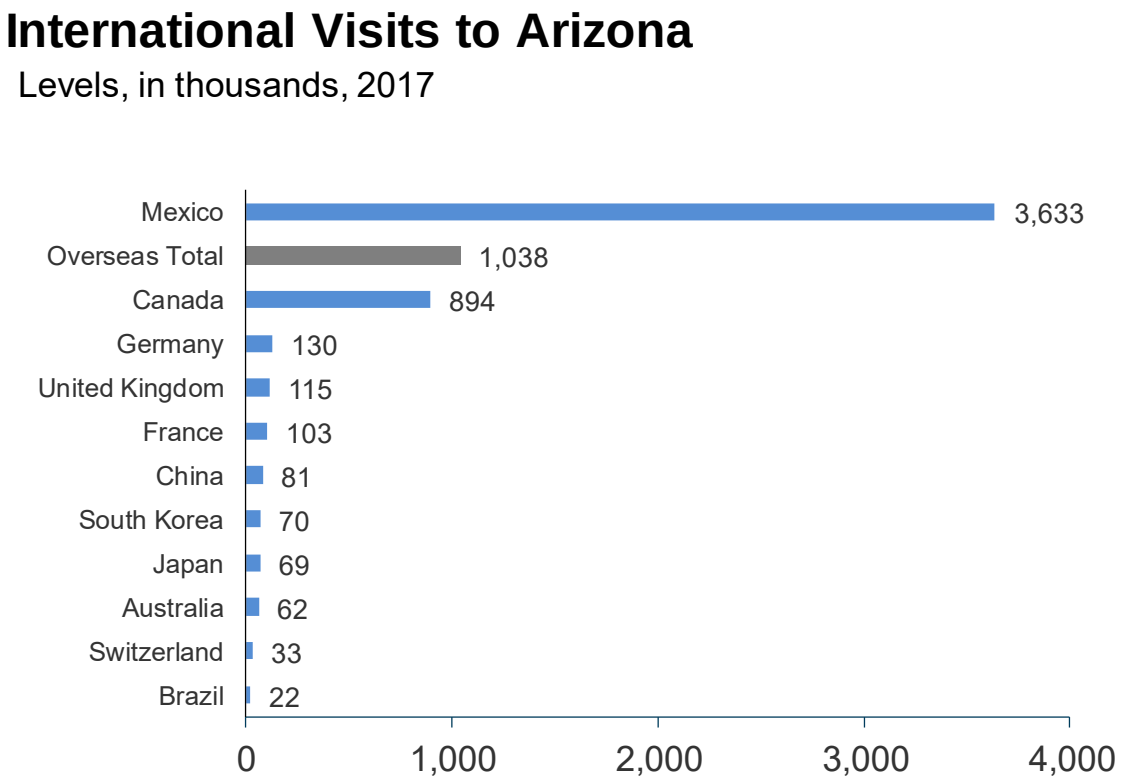
International Visits to Arizona

% Change, 2017

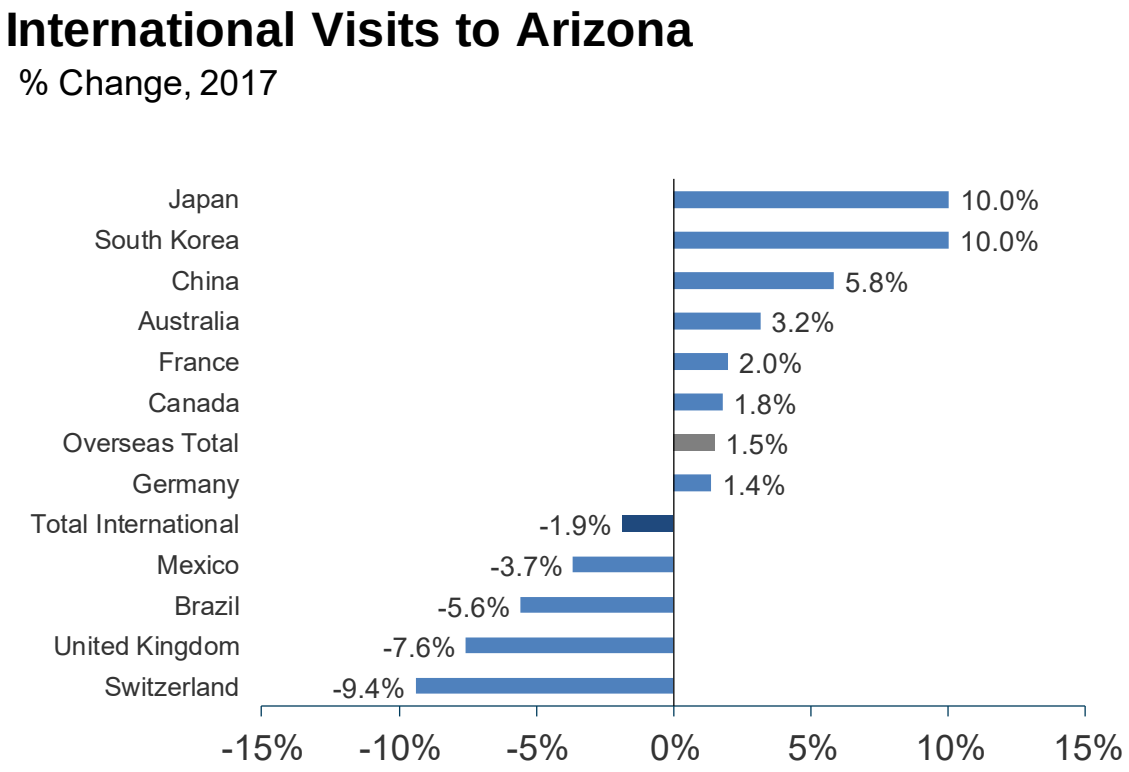


Source: OAG

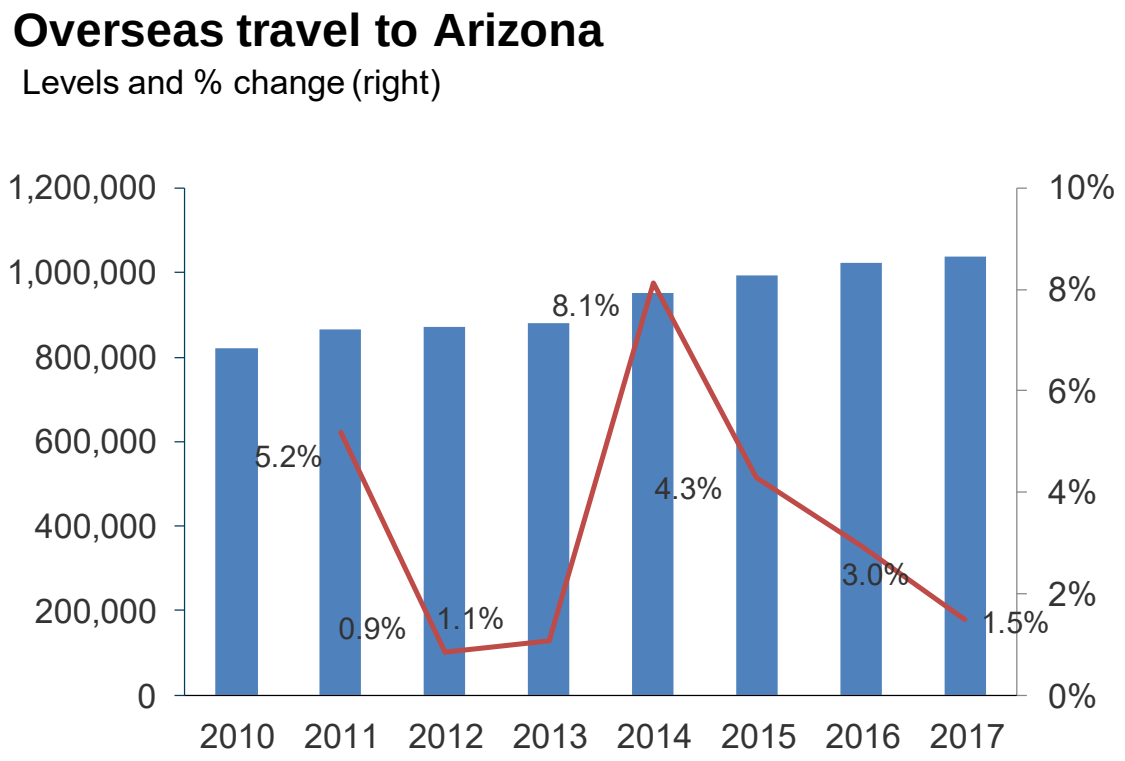
Arizona international travel, summary



Arizona international travel, summary



Overseas summary



International visits to Arizona, levels

International Overnight Visits to Arizona								
	2010	2011	2012	2013	2014	2015	2016	2017
Mexico	3,310,184	3,158,622	3,373,909	3,635,939	3,854,431	3,790,919	3,771,407	3,633,296
Canada	650,000	703,800	728,000	850,200	896,467	928,051	878,647	894,241
Germany	116,580	120,000	120,229	119,971	127,705	133,903	127,823	129,582
United Kingdom	131,107	123,000	117,000	114,186	116,542	117,581	124,013	114,634
France	97,108	110,000	106,865	105,846	113,385	111,960	101,303	103,309
China	20,972	25,000	31,000	36,705	52,105	63,911	76,884	81,373
South Korea	41,701	40,000	44,111	52,725	54,015	61,128	63,524	69,882
Japan	40,931	45,000	47,015	49,080	51,602	54,803	62,724	69,010
Australia	40,812	44,000	45,803	43,711	47,535	54,466	59,908	61,798
Switzerland	35,507	39,000	36,674	34,380	36,554	36,502	35,946	32,567
Brazil	20,349	23,000	27,001	27,978	30,992	29,649	23,784	22,458
Other Overseas	276,324	295,000	295,650	296,194	321,878	329,263	346,636	353,089
Overseas Total	821,391	864,000	871,347	880,777	952,313	993,167	1,022,545	1,037,703
Total International	4,781,575	4,726,422	4,973,256	5,366,916	5,703,210	5,712,138	5,672,599	5,565,240

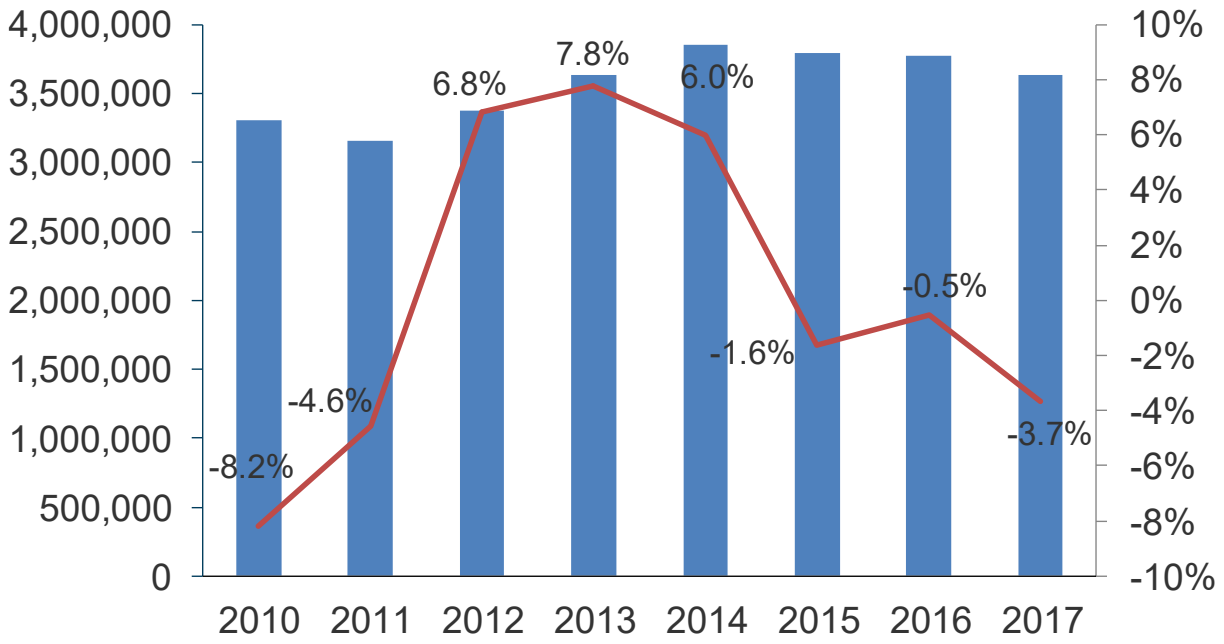
International visits to Arizona, % change

International Overnight Visits to Arizona							
	2011	2012	2013	2014	2015	2016	2017
Mexico	-4.6%	6.8%	7.8%	6.0%	-1.6%	-0.5%	-3.7%
Canada	8.3%	3.4%	16.8%	5.4%	3.5%	-5.3%	1.8%
Germany	2.9%	0.2%	-0.2%	6.4%	4.9%	-4.5%	1.4%
United Kingdom	-6.2%	-4.9%	-2.4%	2.1%	0.9%	5.5%	-7.6%
France	13.3%	-2.9%	-1.0%	7.1%	-1.3%	-9.5%	2.0%
China	19.2%	24.0%	18.4%	42.0%	22.7%	20.3%	5.8%
South Korea	-4.1%	10.3%	19.5%	2.4%	13.2%	3.9%	10.0%
Japan	9.9%	4.5%	4.4%	5.1%	6.2%	14.5%	10.0%
Australia	7.8%	4.1%	-4.6%	8.7%	14.6%	10.0%	3.2%
Switzerland	9.8%	-6.0%	-6.3%	6.3%	-0.1%	-1.5%	-9.4%
Brazil	13.0%	17.4%	3.6%	10.8%	-4.3%	-19.8%	-5.6%
Other Overseas	6.8%	0.2%	0.2%	8.7%	2.3%	5.3%	1.9%
Overseas Total	5.2%	0.9%	1.1%	8.1%	4.3%	3.0%	1.5%
Total International	-1.2%	5.2%	7.9%	6.3%	0.2%	-0.7%	-1.9%

Mexico

Mexico travel to Arizona

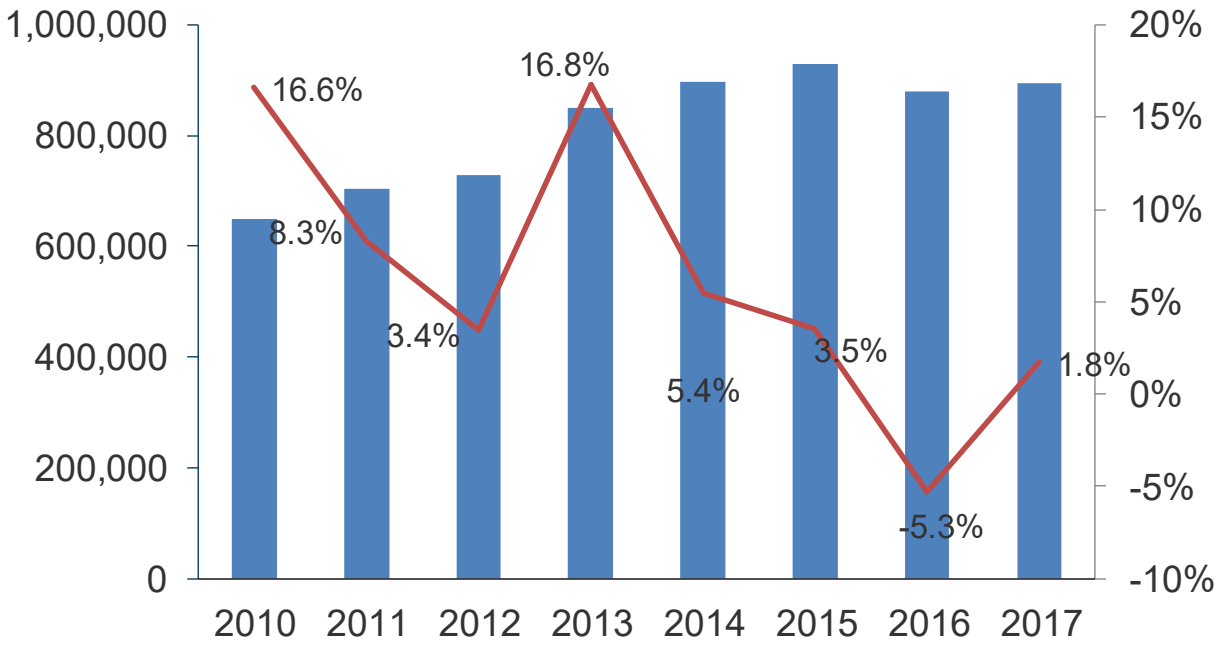
Levels and % change (red line, right axis)



Canada

Canada travel to Arizona

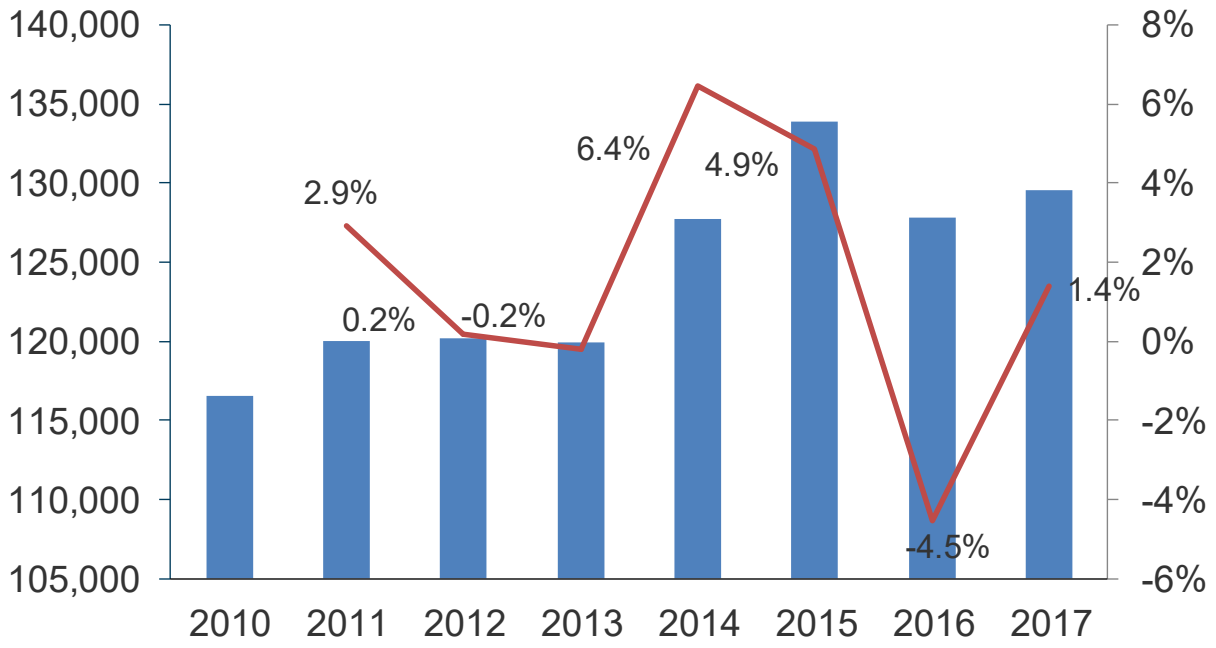
Levels and % change (red line, right axis)



Germany

Germany travel to Arizona

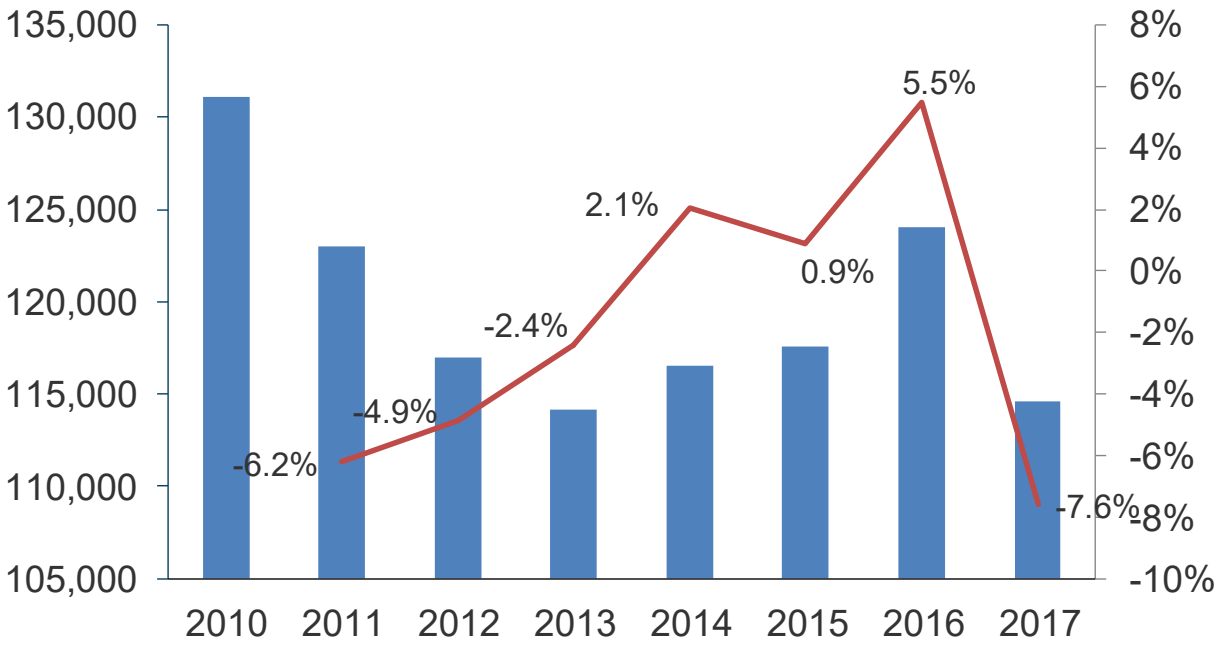
Levels and % change (red line, right axis)



United Kingdom

UK travel to Arizona

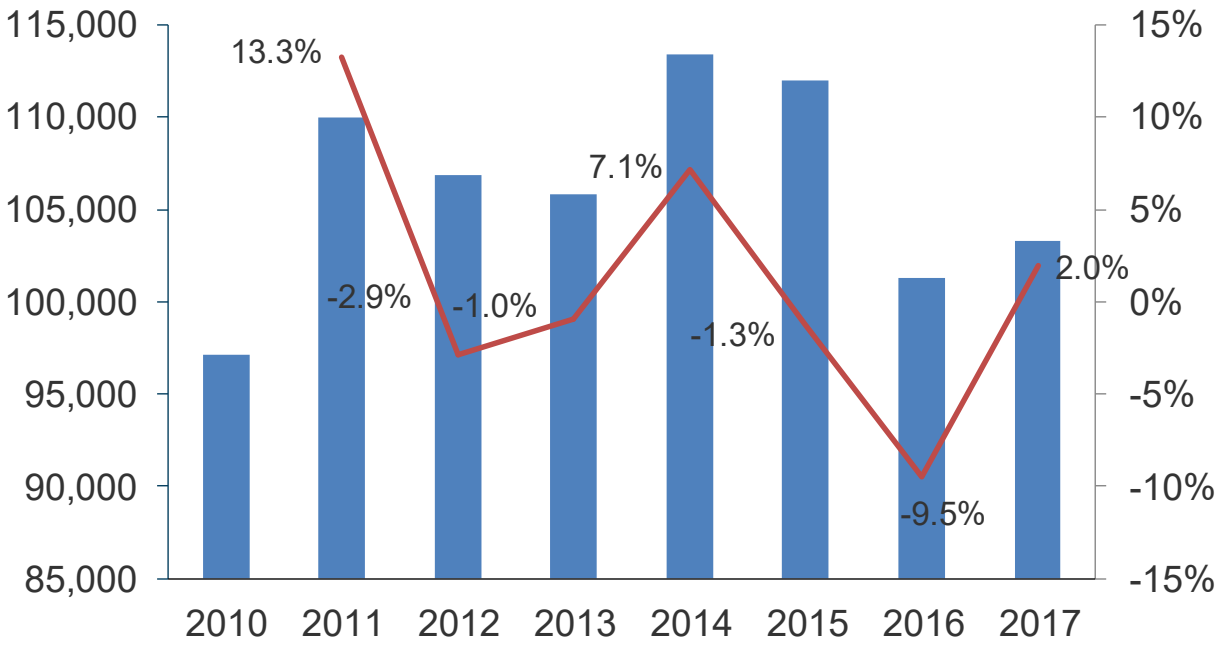
Levels and % change (red line, right axis)



France

France travel to Arizona

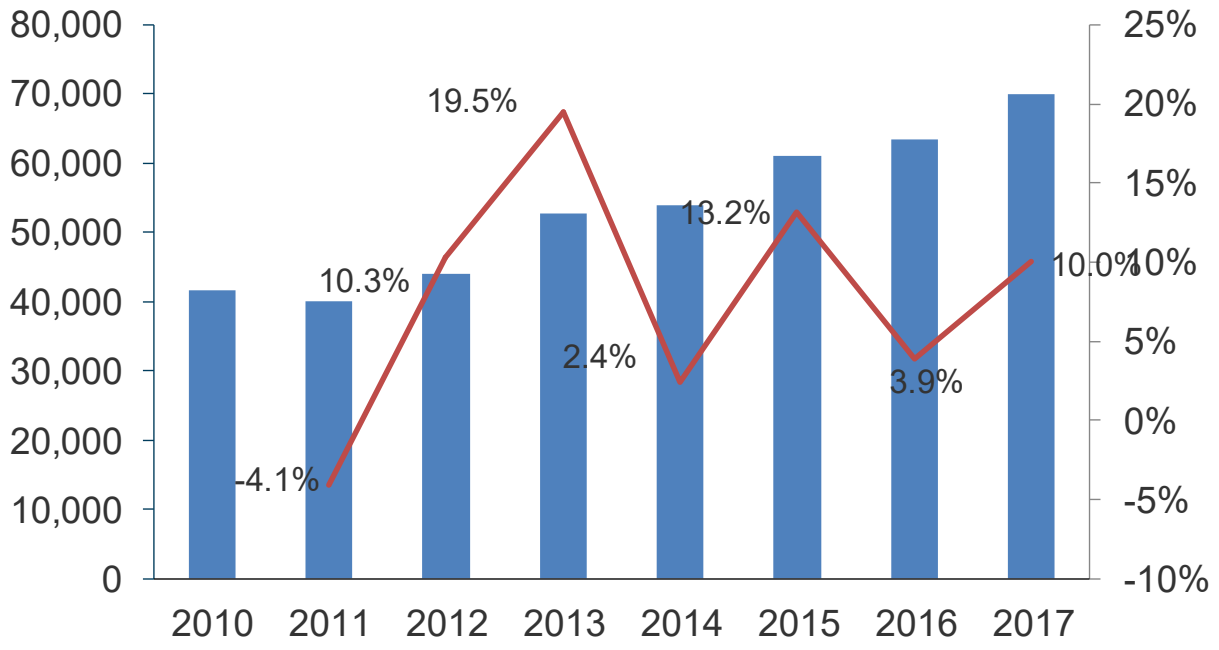
Levels and % change (red line, right axis)



South Korea

South Korea travel to Arizona

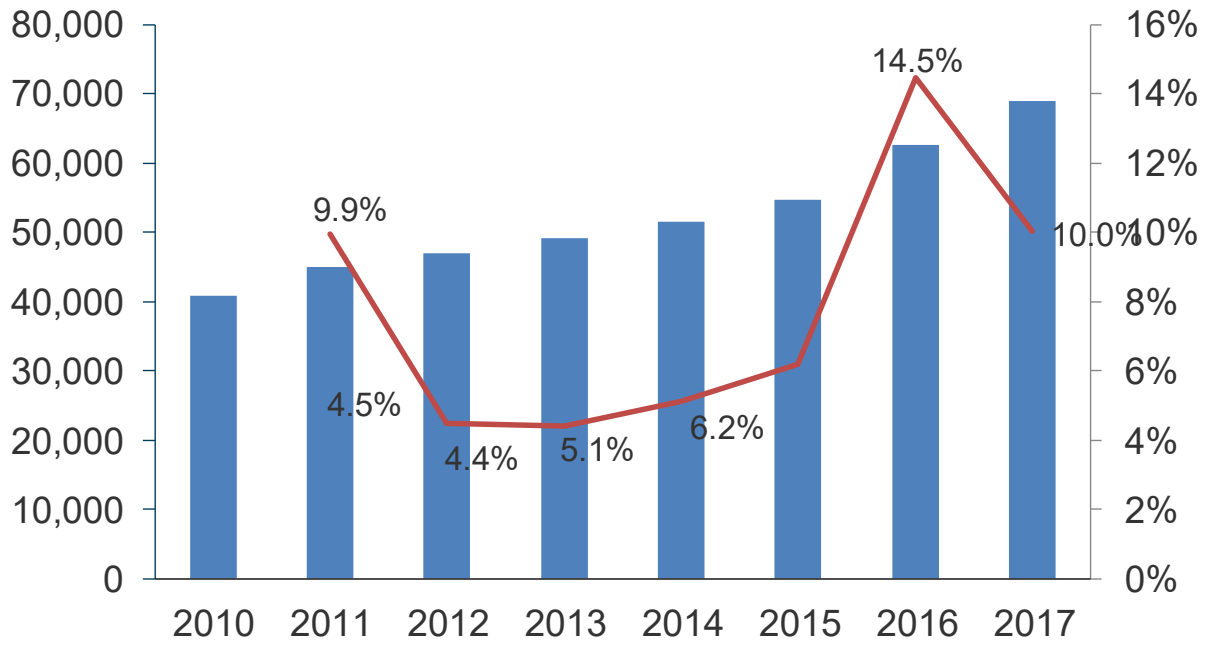
Levels and % change (red line, right axis)



Japan

Japan travel to Arizona

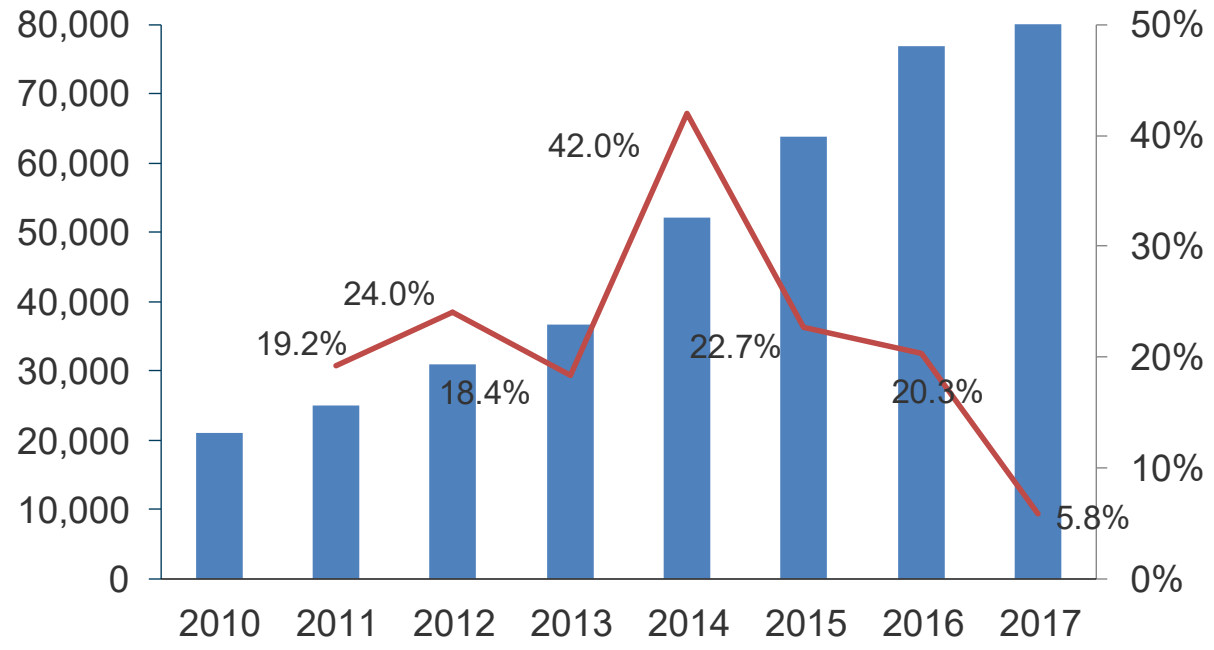
Levels and % change (red line, right axis)



China

China travel to Arizona

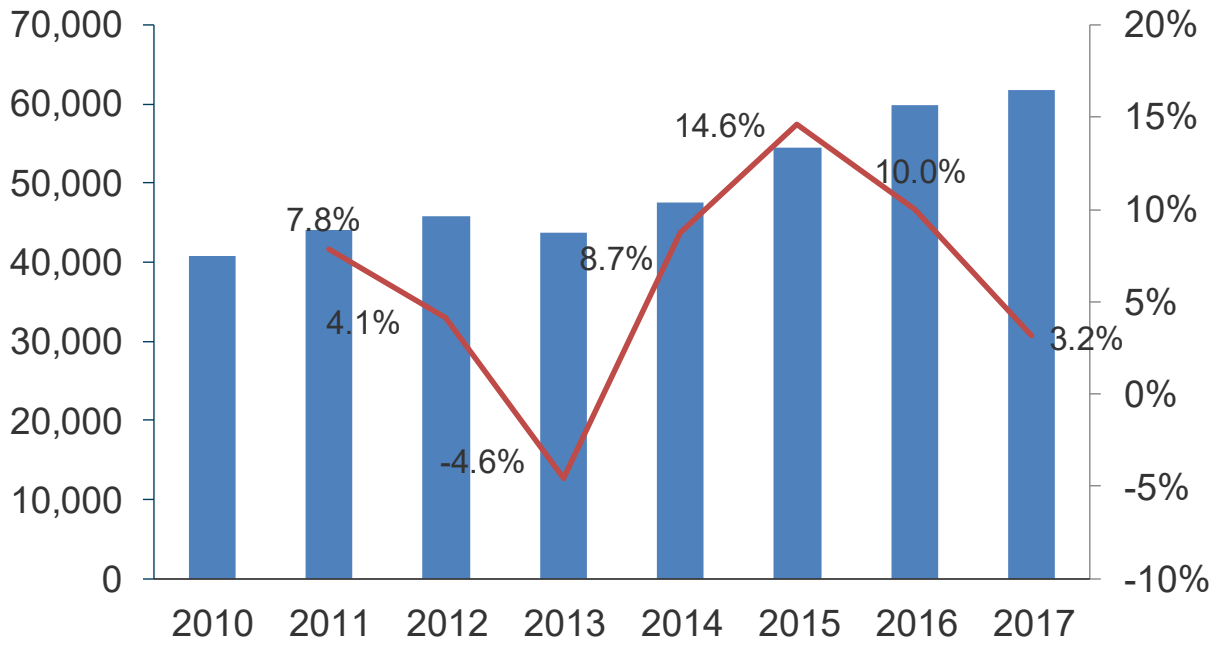
Levels and % change (red line, right axis)



Australia

Australia travel to Arizona

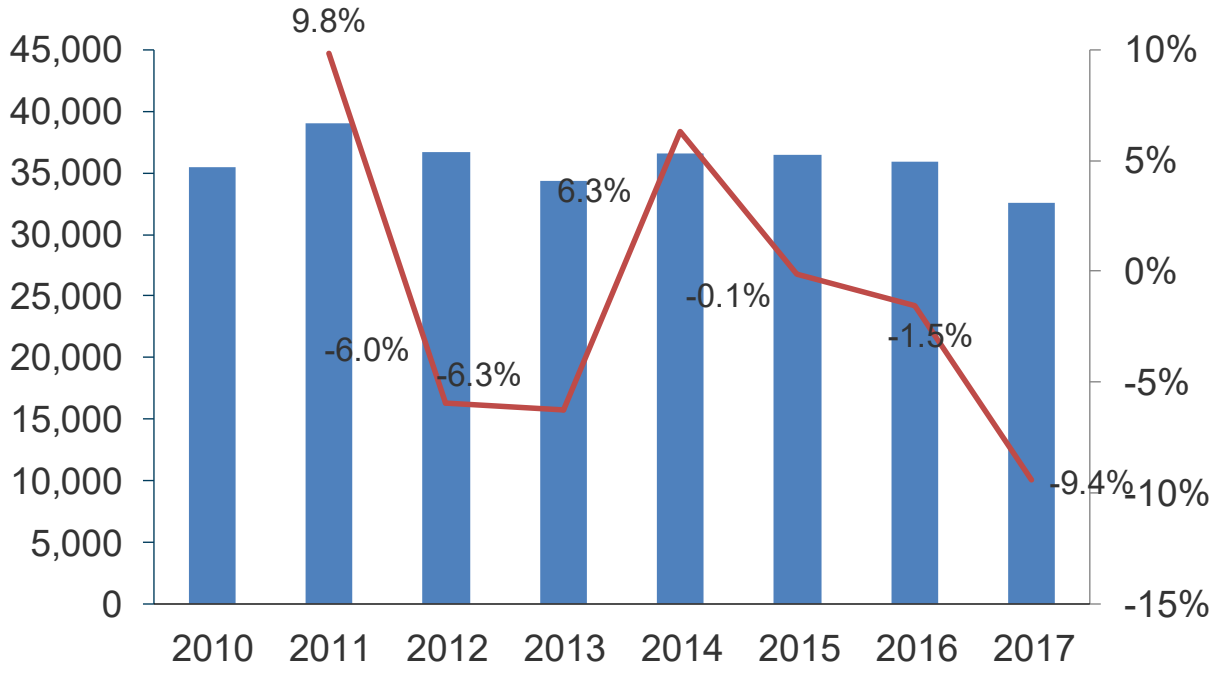
Levels and % change (red line, right axis)



Switzerland

Switzerland travel to Arizona

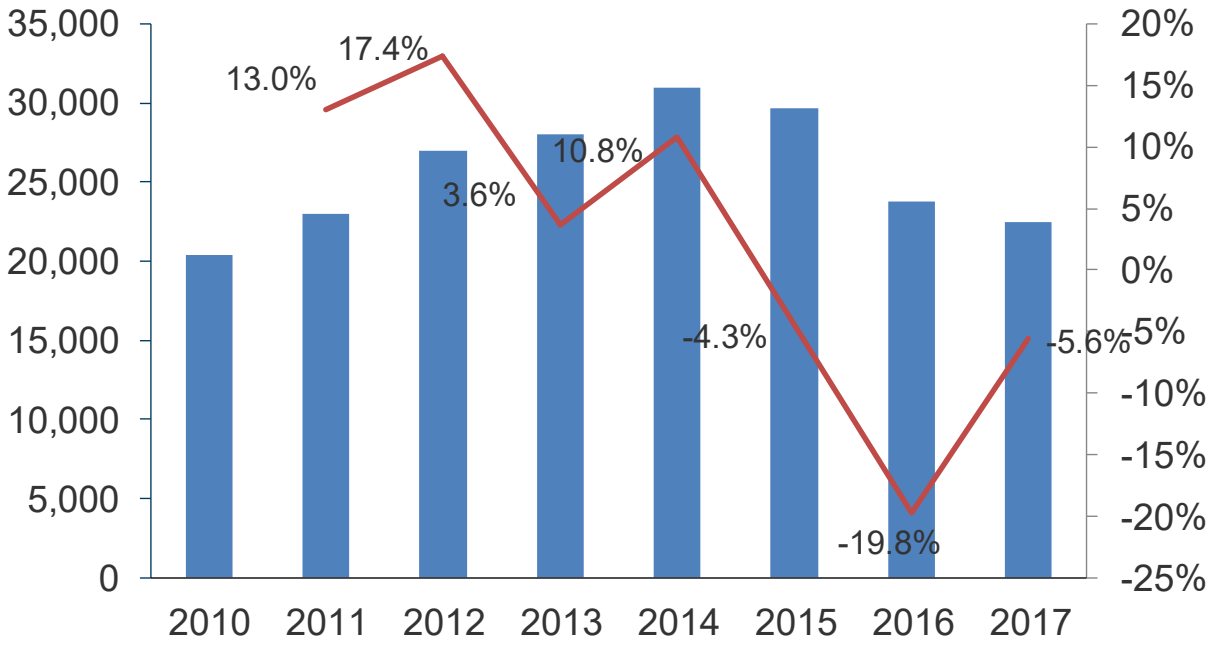
Levels and % change (red line, right axis)



Brazil

Brazil travel to Arizona

Levels and % change (red line, right axis)



TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

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VisitTheUSA.au

Brand USA

Market Information 2018

AUSTRALIA & NEW ZEALAND



Cover images: Grand Teton National Park, Wyoming and Brooklyn, New York

About this Guide

Brand USA is pleased to present this guide in partnership with the U.S. Commercial Service and the National Travel and Tourism Office (NTTO). It includes snapshots of the economies in Australia and New Zealand along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

TABLE OF CONTENTS

About Brand USA 4
A Message from Christopher L. Thompson. 5
Brand USA Executive and Senior Leadership 7
Geography 8
Demographics 8
Economy 9
Vacation Allocation 9
International Visitation Trends 11
Travel Trends 12
Traveler Characteristics 14
Air Travel Information 17
Market Snapshot 19
Brand USA Online Channels 23
Brand USA Traveler Research 26
Brand USA Highlights 31
Brand USA Markets 33
Visit USA Committees, Australia and New Zealand 34
About the U.S. Commercial Service 35
Our Partnership with the U.S. Department of Commerce 36
About the National Travel & Tourism Office 36

About Brand USA

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked in close partnership with more than 800 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

According to studies by Oxford Economics, over the past five years Brand USA's marketing initiatives have helped welcome 5.4 million incremental visitors to the USA, benefiting the U.S. economy with $38.4 billion in total economic impact, and supporting more than 51,000 incremental jobs each year.

Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

For industry or partner information about Brand USA, please visit TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at VisitTheUSA.com.

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A Message From Christopher L. Thompson



We at Brand USA — the public-private partnership established eight years ago to promote international tourism to the U.S. — look forward to working with you to generate business in the Australian and New Zealand outbound-travel sectors. This guide will familiarize you with the elements that make this pair of markets so attractive.

You will also discover receptive audiences in these two countries. In a Brand USA survey assessing where Australians and New Zealanders intend to go on their next holiday, the USA leads all other global destinations. It is the choice of nearly one out of five travelers.

Australia ranks as the 10th-largest source market for inbound visitation to the United States. About 1.35 million Australians traveled to our country during 2016. On the spending side, Australians were number-eight among the top-10 international visitors who came to the United States that year, having spent a total of $8.7 billion.

It is significant to note that many of the Australians and New Zealanders who visit the United States are inclined to make the trip more than once. And with intense competition among air carriers, fares are staying low.

In addition to coming the USA in record numbers, the Australians and New Zealanders are staying longer than other groups. The average length of stay is 22 days—second longest among travelers from the top 10-source markets.

Presently, Brand USA is expanding its new travel-entertainment TV channel, GoUSA TV, which launched earlier this year. Brand USA is the first destination-marketing organization to develop such an outlet. GoUSA TV is now available on Roku, Apple TV and Amazon Fire TV around the globe. In 2019, the channel will also be on Google Chromcast.

Now in its first stages of development, GoUSA TV features an assortment of travel experiences across four different categories: The Great Outdoors, Road Trips, Food and Drink, and Culture and Events. GoUSA TV will increase programming to include additional themes and formats, including series, films, videos and live videos.

Brand USA's new giant-screen film, "America's Musical Journey" – since its release earlier this year – is another significant part of our outreach for introducing international travelers to the United States. The unique styles of American music evoke our cultural heritage and the stories associated with iconic locations across the U.S. landscape.

Overall, Brand USA, has committed to a comprehensive "digital-screen strategy" that presents a storytelling approach regarding the diversity of travel possibilities in the United States. Using mediums that run the gamut from quick mobile content to giant-screen films, the storytelling continues to be relevant, engaging and authentic.

Australia is also one of four target markets in Brand USA's new "Sounds Travel" campaign, which uses 3-D audio to highlight U.S. travel. Consumers can select audio options that were recorded in specified U.S. destinations. The audio experiences, best gained through headphones, come with other related content – articles, photos and itineraries. Brand USA partnered with Expedia Media Solutions to create the program.

I invite you to talk to our team about trip experiences in the USA and opportunities to enhance your marketing efforts in Australia and New Zealand. They can discuss with you the best ways to inspire these "down-under" travelers to book their trips to the USA now.

This past February, for instance, Brand USA participated in the annual Visit USA travel-agent expos, held in the Australian cities of Brisbane, Melbourne and Sydney. Brand USA also hosted its annual B2B Day in Sydney, where top buyers had individual appointments with more than 40 U.S. industry partners.

Also of note, is Brand USA's dedicated travel-trade website. This online portal, which launched at the start of this year, is a comprehensive gateway that allows industry professionals to easily navigate information about U.S. travel. In the Australia and New Zealand markets, which have 25,000 retail travel agents and where on-site travel agencies are especially important, this website is sure to make a difference.

Together, we are marketing the USA!

Chris Thompson

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Brand USA

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Geography

Area

Australia

7,741,220 sq km

New Zealand

268,838 sq km

Source: CIA World Factbook 2018

Climate

Australia

Generally arid to semiarid; temperate in south and east; tropical in north.

New Zealand

Temperate with sharp regional contrasts.

Demographics

Population

Australia

23,232,413 (July 2017 est.)

New Zealand

4,510,327 (July 2017 est.)

Source: CIA World Factbook 2018

Largest Metropolitan Areas, Australia

Sydney: 4.505 million

Melbourne: 4.203 million

Brisbane: 2.202 million

Perth: 1.861 million

Adelaide: 1.256 million

Canberra (capital): 430,169

Largest Metropolitan Areas, New Zealand

Auckland: 1.344 million

Wellington (capital): 383,000 (2015 est.)

Source: CIA World Factbook 2018

Age Structure

Age	Australia	New Zealand
0-14 years	17%	20%
15-24 years	13%	14%
25-54 years	42%	40%
55-64 years	12%	12%
65 years and older	16%	15%
Median age	38.6 years	38 years
Population growth rate (2017 est.)	1.05%	0.8%

Source: CIA World Factbook 2018

Economy

Australia

Growth Domestic Product (GDP): $1.235 trillion
GDP real growth rate: 2.2% (2017 est.)
GDP—per capita: $49,900 (2017 est.)
Unemployment rate: 5.6% (2017 est.)
Inflation rate: 2%

New Zealand

Growth Domestic Product (GDP): $185.7 billion (2017 est.)
GDP real growth rate: 3.5% (2017 est.)
GDP—per capita: $38,500 (2017 est.)
Unemployment rate: 4.9% (2017 est.)
Inflation rate: 2.2%

Source: CIA World Factbook 2018

Vacation Allocation and Public Holidays

National public holidays, 2018 (Australia)

New Year's Day, Monday, Jan. 1

Australia Day, Friday, Jan. 26

Good Friday, March 30

Easter Monday, April 2

ANZAC Day, Wednesday, April 25

Queen's Birthday, Monday, June 11

Labour Day, Monday, Oct. 1

Christmas Day, Tuesday, Dec. 25

Boxing Day, Wednesday, Dec. 26

National public holidays, 2018 (New Zealand)

New Year's Day, Monday, Jan. 1

Day after New Year's Day, Monday, Jan. 2

Waitangi Day, Tuesday, Feb. 6

Good Friday, Friday, March 30

Easter Monday, Monday, April 2

ANZAC Day, Wednesday, April 25

Queen's Birthday, Monday, June 4

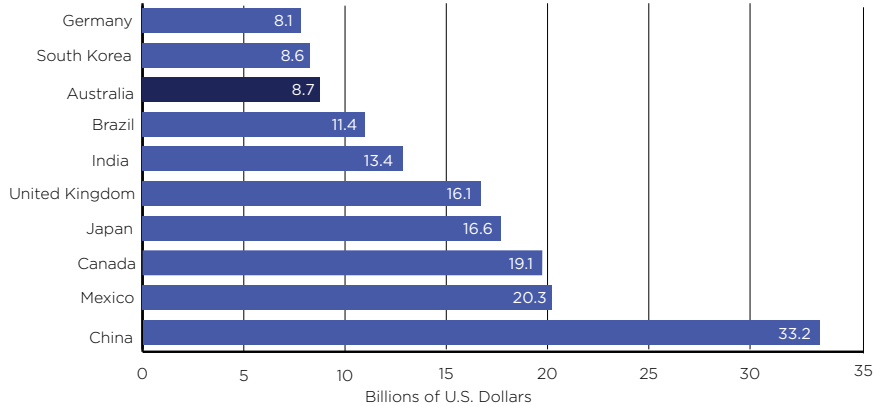
Labour Day, Monday, Oct. 22

Christmas Day, Tuesday, Dec. 25

Boxing Day, Wednesday, Dec. 26

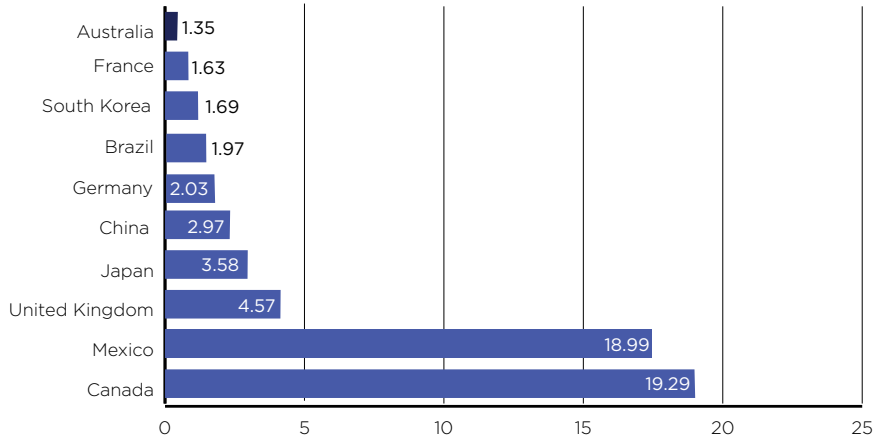
International Visitation Trends*

International Tourism Expenditures 2016 (U.S. Dollar billion)



Source: U.S. Department of Commerce National Travel and Tourism Office, 2016 Edition

International Arrivals to the USA 2016



Source: U.S. Department of Commerce National Travel and Tourism Office, 2016 Edition

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Travel Trends*

Spending Trends (Exports)—Australia (U.S. Dollar Million)

Year	Total Travel & Tourism Exports	Travel Receipts	Passenger Fare Receipts	Change (%) in Total Exports
2009	$6,712	$5,724	$988	2
2010	$7,155	$6,004	$1,151	35
2011	$7,751	$6,411	$1,340	11
2012	$8,092	$6,604	$1,488	-4
2013	$8,935	$7,326	$1,609	22
2014	$10,016	$8,324	$1,692	10
2015	$11,805	$10,187	$1,618	10
2016	$8,727	$7,937	$790	-7
Change 2016/2009	$4,334	$3,993	$341	99

Source: U.S. Department of Commerce National Travel and Tourism Office

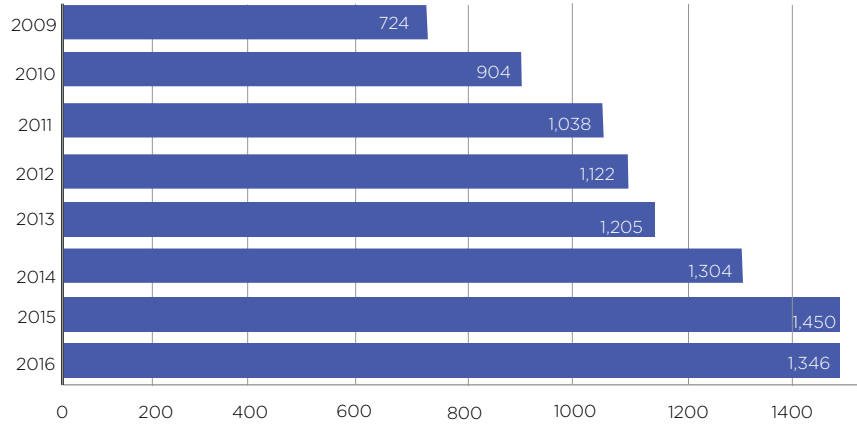
Spending Trends (Exports) —New Zealand (U.S. Dollar Million)

Year	Total Travel & Tourism Exports	Travel Receipts	Passenger Fare Receipts	Change (%) in Total Exports
2009	$510	$511	(1)	-13
2010	$614	$615	(1)	20
2011	$707	$708	(1)	15
2012	$850	$851	(1)	20
2013	$940	$850	$90	11
2014	$1,155	$1,084	$71	23
2015	1,288	$1,253	$35	12
2016	$1,257	$1,229	$28	-2
Change 2016/2009	$5,087	$747	$29	146

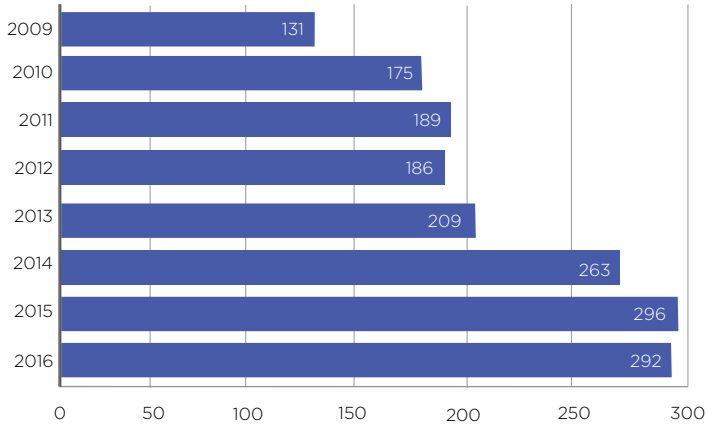
Source: U.S. Department of Commerce National Travel and Tourism Office

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Visitation Trends (arrivals)—Australia



Visitation Trends (arrivals)—New Zealand



Source: U.S. Department of Commerce National Travel and Tourism Office

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Traveler Characteristics*

Main Purpose of Trip

Main Purpose of Trip	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Vacation/Holiday	68	63	69	64	1.0	1.5
Visit Friends/Relatives	17	21	16	21	-0.7	-0.7
Business	6	5	5	5	-0.2	-0.2
Convention/Conference/ Trade Show	6	8	6	8	0.3	0.1
Education	4	2	3	1	-0.5	-1.8
Health Treatment	0.1	0.0	0.3	0.0	0.2	0.0
Religion/Pilgrimages	0.3	0.3	0.3	2	0.0	1.2
Other	0.2	0.4	0.2	0.3	0.0	-0.1

Source: U.S. Department of Commerce National Travel and Tourism Office

All Purposes of Trip

Purpose of Trip	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Business	8	6	7	8	-0.2	1.8
Visit Friends/Relatives (VFR)	33	39	31	39	-2.2	0.0
Vacation/Holiday	80	82	81	80	0.1	-1.7
Convention/Conference/ Tradeshow	9	9	8	10	-1.7	1.0
Education	7	6	5	3	-2.2	-2.8
Religion/Pilgrimages	1	1	1	1	-0.2	0.8
Health Treatment	0.2	0.2	1	0.3	0.3	0.1
Other	0.3	1.3	1	0.0	0.3	-0.8

Source: U.S. Department of Commerce National Travel and Tourism Office

Select Traveler Characteristics

Traveler Characteristics	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Length of Stay in U.S. (mean nights)	22.4	21.1	22.3	16.2	-0.1	-4.9
Length of Stay in the U.S. (median nights)	15	14	14	12	-1.0	-2.0
First International Trip to the U.S.	29	29	27	18	-2.7	-11.2

Source: U.S. Department of Commerce National Travel and Tourism Office

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Activity Participation While in the USA

Activity	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Shopping	92	92	92	94	-0.1	2.1
Sightseeing	91	91	90	90	-0.4	-1.3
National Parks/ Monuments	60	55	57	51	-2.3	-4.0
Experience Fine Dining	46	36	40	34	-5.7	-2.5
Small Towns/ Countryside	46	51	46	43	0.0	-8.7
Art Gallery/Museum	44	39	40	39	-4.0	-0.3
Amusement/Theme Parks	36	35	35	36	-1.1	0.8
Historical Locations	49	48	48	43	-0.8	-4.8
Guided Tours	52	51	49	43	-3.3	-7.8
Nightclubbing/ Dancing	27	14	20	10	-7.4	-4.1

Source: U.S. Department of Commerce National Travel and Tourism Office

U.S. Destinations Visited, Australia (States, Cities, and Regions)

Visitation to U.S. Destinations/Regions	Market Share 2015 (%)	Volume 2015 (000)	Market Share 2016 (%)	Volume 2016 (000)
Regions				
Pacific	53.52	776	52.53	707
States				
California	49.34	715	49.28	664

Note: No destinations meet the minimum sample requirement for New Zealand.
Source: U.S. Department of Commerce National Travel and Tourism Office

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Transportation Used in the United States

Transportation Types Used in the USA	2015 (%)		2016 (%)		Point Change	
	Australia	NewZealand	Australia	New Zealand	Australia	New Zealand
Airline Travel between U.S. Cities	65	57	58	56	-6.6	-1.5
Taxicab/Limousine	48	45	47	45	-1.2	-0.4
Auto Private or Company	37	42	40	37	3.2	1.3
City Subway/Tram/Bus	43	33	44	43	1.2	0.1
Bus between Cities	28	20	23	18	-5.0	17.5
Rented Auto	32	33	35	36	2.8	2.5
Railroad between Cities	7	12	13	13	-0.5	0.2
Ferry/River Taxi/Srt Scenic Cruise	17	18	15	13	-2.3	-5.4
Motor Home/Camper	2	3	1	1	-0.8	-1.6
Cruise Ship/River Boat 1+ Nights	14	7	9	5	-5.1	-1.8
Rented Bicycle/ Motorcycle/Moped	7	4	6	4	-0.2	0.4

Source: U.S. Department of Commerce National Travel and Tourism Office

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Air Travel Information

Nonstop flights from Australia to the USA

Airline	Origin	Destination
Qantas	Melbourne (MEL)	Los Angeles (LAX)
	Sydney (SYD)	Los Angeles (LAX)
	Brisbane (BNE)	Los Angeles (LAX)
	Sydney (SYD)	Dallas Fort Worth (DFW)
	Sydney (SYD)	San Francisco (SFO)
	Sydney (SYD)	Honolulu (HNL)
United Airlines	Melbourne (MEL)	Los Angeles (LAX)
	Sydney (SYD)	Houston (IAH)
	Sydney (SYD)	Los Angeles (LAX)
	Sydney (SYD)	San Francisco (SFO)
Delta	Sydney (SYD)	Los Angeles (LAX)
Virgin Australia	Sydney (SYD	Los Angeles (LAX)
	Brisbane (BNE)	Los Angeles (LAX)
	Melbourne (MEL)	Los Angeles (LAX)
American Airlines	Sydney (SYD)	Los Angeles (LAX)
Hawaiian Airlines	Sydney (SYD	Honolulu (HNL)
	Brisbane (BNE)	Honolulu (HNL)
Jetstar	Sydney (SYD	Honolulu (HNL)
	Melbourne (MEL)	Honolulu (HNL)

New Zealand Air Travel Information

Nonstop flights from Australia to the USA

Airline	Origin	Destination
Air New Zealand	Auckland (AKL)	Los Angeles (LAX)
	Aukland (AKL)	San Francisco (SFO)
	Auckland (AKL)	Houston (IAH)
	Auckland (AKL)	Honolulu (HNL)
United Airlines	Auckland (AKL)	San Francisco (SFO)
	Auckland (AKL)	Chicago (ORD)
American Airlines	Auckland (AKL)	Los Angeles (LAX)
Hawaiian Airlines	Auckland (AKL)	Honolulu (HNL)

Market Snapshot

Australians and New Zealanders have long had a love affair with the USA. Inspired by popular culture and iconic USA travel experiences, Antipodean travelers have consistently placed the USA at the top of their bucket list. Over recent years, visitation has reach record levels, in fact more than doubling over the past 10 years. Market share has also grown; the USA is now the number one long haul destination from Australia and New Zealand.

Australians and New Zealanders are also traveling to the USA more frequently than ever before. As new airlift and increased connectivity has a downward pressure on airfares and opens up easier access to new areas of the country. Repeat visitation is currently 73% an increase of 2% compared to the previous year. Though the populations of Australia and New Zealand are relatively small – 24 million and 4.5 million, respectively - the impressive number of repeat visitors is an offsetting factor

Visitors from Australia and New Zealand travel further and stay longer than most other inbound markets. On average visiting 2.1 states per trip and staying on average for 22 days. Consequently they tend to spend more too. Australia ranks as the 8th largest market for international visitor spend in the U.S. despite having the smallest population of any nation in the top 10 markets.

Source: Survey of International Air Travelers, Australian Travelers to the U.S., January-December 2016, U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Travel markets summary

Australia and New Zealand are enjoying a period of economic stability. Famously, Australia has posted 25 years of unbroken growth. Steady continuous GDP growth, stable exchange rates, high employment rates and low interest rates have all led to high consumer confidence. The main economic challenges are based on stalled wage growth, but in overall terms fiscal conditions are working in favor to fuel increased outbound travel.

This context is supporting strong intention to travel overseas, which remains at an all-time high level. A 2017 Roy Morgan survey reports that 11 per cent of the population is intending to travel overseas in the next 12 months. Travelers from this market tend to be relatively resilient to socio / economic / political factors which appear to have less impact on intention to travel. Living in remote island nations, it's no surprise Australians and New Zealanders

are accustomed to traveling internationally for their vacation. Of those people who took an overseas trip for leisure last year, 77 per cent traveled internationally once. 20 per cent took two or three overseas vacations. A very fortunate 1.6 per cent had four or five overseas vacations.

The other key factor in visitation growth is airlift / airfares. Airlift to the USA from Australia and New Zealand is at record high levels, pushing fares down to record lows. Fares have dropped by more than 30 per cent over the past five years. The average return airfare to LAX can be as low as USD $850, the equivalent to just three days average wage. It's never been so affordable to travel to the USA. In addition new routes are opening, decreasing travel time to southern and eastern USA. In 2018 United will start flying Sydney to Houston, the only airline from Australia to operate this route.

Australians and New Zealanders who travel to the United States go primarily on leisure trips. According to the U.S. Department of Commerce National Travel and Tourism Office, 85 percent visit for holidays (VFR). Only 6 percent visit for conventions, conferences and tradeshows, and 5 percent visit for general business travel. It is thought that travel distance factors likely reduce the demand for business travel.

Once in the United States, Australian travelers participate in various leisure-type activities: 92 per cent go shopping; 90 per cent go sightseeing; 57 per cent visit a national park or monument. In addition, 48 per cent visit historical locations, 40 per cent experience fine dining and 40 per cent go to art galleries or museums. It is noteworthy that 52 percent of visiting Australians take guided tours. Popular tour operators for this market include Trafalgar, Scenic, APT and Collette.

The peak season for U.S. travel by Australians and New Zealanders runs June through September – peak season in the United States, winter "Down Under." Smaller spikes in U.S. arrivals occur in December and January, coinciding with school holidays in Australia and New Zealand. The two peak booking periods are February-March and July-August. However, as travel frequency increases, there is a trend seeing the booking seasons stretch out.

The top five sources for researching a holiday are: directly with airlines (49%); online travel agency (46%); travel agency office (39%); personal recommendation (38%); travel guides (20%). Both travel agents and the internet play important roles in the research and booking process.

Australia and New Zealand remains one of the rare markets in the world where a consumer will research online and offline and then walk into a physical store to make their booking with an agent. Working with, educating and incentivizing agents is a key part of the best practice approach in this market. The retail travel industry network remains a crucial influencer on travel decision-making. There are approximately 25,000 retail travel agents in Australia and New Zealand. Most work in a retail store, while home based 'travel managers' are increasing in numbers, competing with high levels of customer service, well established clientele and a bespoke approach.

The majority of wholesale distribution within Australia and New Zealand firmly sits between the two dominant players - Flight Centre Travel Group (Infinity Holidays) and Helloworld Travel Group (Qantas Holidays and Viva Holidays). Between them they claim around 80 per cent of the market.

The remaining percentage of wholesale distribution is split between smaller companies, including Adventure World, Freestyle Holidays, Venture Holidays, Excite Holidays, and others.

Technological advances, a refined user experience and niche specialization are the keys to the smaller wholesalers' success, while vertical integration and mass reach are key to the larger wholesalers' success.

The internet's role has strengthened over recent years, following a long period of fragmentation cluttered with small independents across the online travel space in Australia and New Zealand. Expedia has acquired Wotif.com and Orbitz, making it one of four dominant players that have emerged in this space Down Under. OTAs are offering more choice for customers and loyalty promotions are gaining traction; for example hotels.com 'Rewards' book 10 nights, get one free.

However the OTA sector is smaller in Australia and New Zealand than most other developed markets.

New developments

There has been a 10-fold increase in representation of U.S. DMOs locally in the last five years. In 2017 4 new destinations took representation: Seattle, Portland, Memphis and Philadelphia. The additional representation is positive, increasing the total share of voice for the USA. Brand USA works with all destinations in market to create collective marketing initiatives.

A new trend that our trade partners are reporting, is more Australians and New Zealanders using travel agents to design bespoke itineraries for their USA holidays. This would appear to be part of a wider trend across consumer behavior with the demand for 'unique' travel experiences. Tour operators are reporting this as a challenge as contracting strategies needs to adapt. The main beneficiaries of this trend would appear to be 'travel managers' – their ability to deliver high customer service levels should allow them to grow their market share. As a knock on affect, traditional retailers have reacted by increasing their presence in this sector. Helloworld acquired Mobile Travel Agents (MTA) and Flight Centre acquired Travel Partners.

There have been a number of acquisitions and mergers across the trade sector as organisations look for scale and competitive advantage in ever changing market. Notable recent acquisitions were Webjet's purchase of Online Republic; Luxury Escape Group's purchase of Bon Voyage Travel; and Helloworld's buy out of Magellan Travel Group.

Brand USA Online Channels

Digital/Social Marketing

Brand USA employs digital and social media marketing strategies to inspire, engage, and activate international travelers to visit the United States during the year through:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Online video
- Retargeting and other targeted advertising

PROPRIETARY CONSUMER WEBSITE PLATFORMS

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which is active in most markets where Brand USA markets the United States to international travelers

- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States.

SOCIAL MEDIA CHANNELS

In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles are used for global, consumer-facing promotions in English:

- Website: VisitTheUSA.com
- Twitter: @VisitTheUSA
- Facebook: Facebook.com/VisitTheUSA
- YouTube: YouTube.com/VisitTheUSA
- Instagram: VisitTheUSA

The following campaign hashtags support global and thematic promotions and initiatives:

- Global: #VisitTheUSA
- Flavors/Culinary: #TasteUSA
- Road Trips: #RoadTripUSA
- Great Outdoors: #OutdoorsUSA
- Market the Welcome: #USAWelcome

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in Chart 1.

CHART 1

Digital Channels

MARKET	URL	Local Tagline	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSAca	@VisitTheUSAca	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAca	@VisitTheUSAca	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAcl	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
China	GoUSA.cn	即刻 定制 您的 USA 旅行计划	n/a	**Sina Weibo** (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn **Youku** (YouTube equivalent): http://i.youku.com/gousacn **Wechat** (Chinese mobile social network for texting, images, music and articles sharing, mobile only):美国国家旅游局			
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAco	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAfr	@VisitTheUSAfr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUSAde	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAde
India	GoUSA.in	Plan Your USA Trip Now	facebook.com/GoUSAin	@GoUSAin	#VisitTheUSA	VisitTheUSA	YouTube.com/GoUSAin
Japan	GoUSA.jp	今すぐ USA への 旅の計画を	facebook.com/GoUSAjp	@GoUSAjp	アメリカ旅行	VisitTheUSA	YouTube.com/GoUSAjp
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	facebook.com/VisitTheUSAmx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	facebook.com/GoUSAkr	@GoUSAkr	#미국여행	VisitTheUSA	YouTube.com/GoUSAkr
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUSAse	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Taiwan	GoUSA.tw	立即訂製專屬你的美國之旅	facebook.com/VisitTheUSA	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	facebook.com/VisitTheUSAuk	@VisitTheUSAuk	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA

Brand USA Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, Inc. to conduct proprietary consumer research in various international markets. Respondents were recruited from an online panel. For markets beyond North America, the results reflect responses from adults who travel outside of their continent for leisure. The Global Market Intelligence program is designed to gain insight into travelers' perceptions of the USA and its competitors, as well as general travel behaviors and preferences.

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural/Historical Attractions	58
Local Lifestyle	55
Shopping	45
Dining/Gastronomy	40
Visiting friends/relatives	37

Top 5 Strongest Impressions of the USA

Impression	% Selected
Adventurous	38
Diverse	36
Friendly	32
Energetic	29
Arrogant	26

Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Australia Intercontinental travelers (N=1017)

Source: Brand USA Market Intelligence Study 2017.

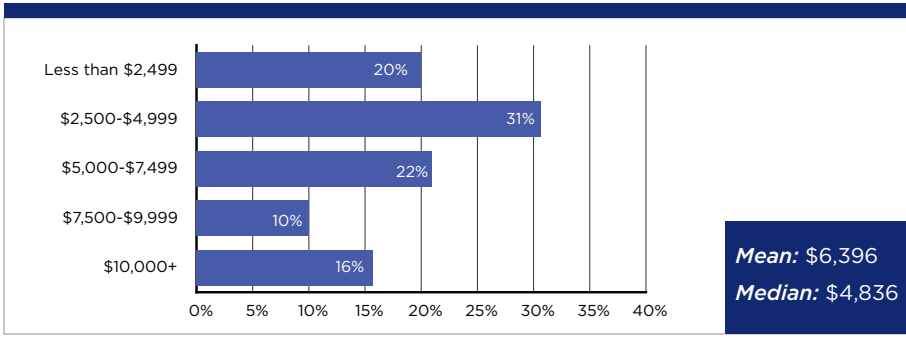
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	66%
Personal recommendations from family and friends	40%
Websites or applications via tablet	26%
Information in printed travel guidebooks	25%
Personal advice from travel professionals/travel agents	23%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Australia Intercontinental travelers 2016 (N=107)

Source: Brand USA Market Intelligence Study 2017.

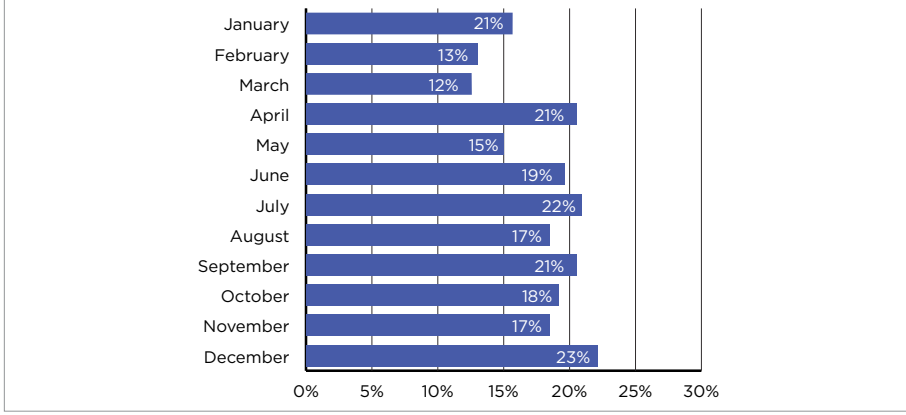
Expected Household Travel Spend for Next Intercontinental Trip



Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: Australia Intercontinental travelers 2016 (N=1017) Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017. (Conversion AUD to USD=0.812

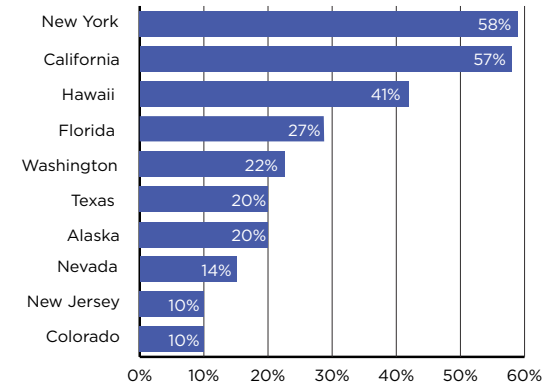
Months Traveled (April 2015-April 2017)



Question: During what month(s) did you take your holiday(s)? Base: Australia Intercontinental travelers 2016 (N=1017)

Source: Brand USA Market Intelligence Study 2017.

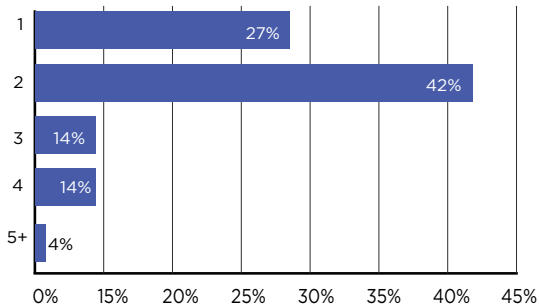
Destination Interest—Top 10 States



Question: You indicated in a previous question that you have interest in visiting the U.S. some time in the future. Which U.S. state(s) are you interested in visiting? Base: Australia Intercontinental travelers with interest in visiting the United States (N=1017).

Source: Brand USA Market Intelligence Study 2017.

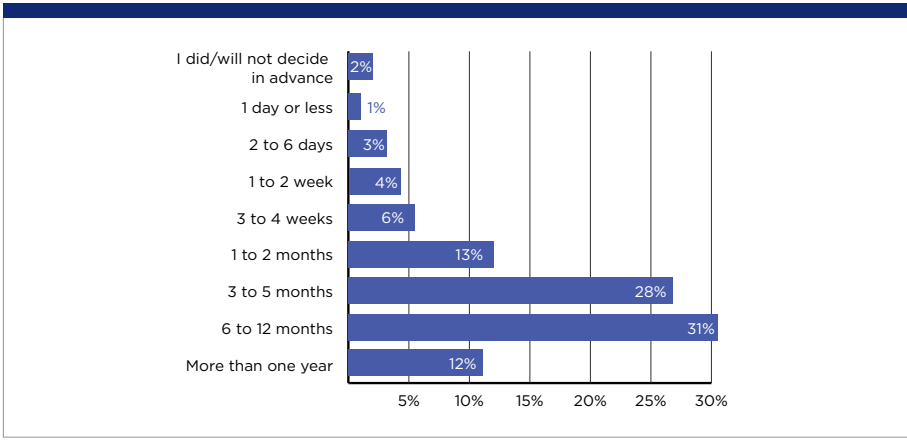
Expected Travel Party Size of Next Intercontinental Trip



Question: How many people in your household will go on this trip? Please count yourself as 1.
Base: Australia Intercontinental travelers 2017 (N=1017) Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

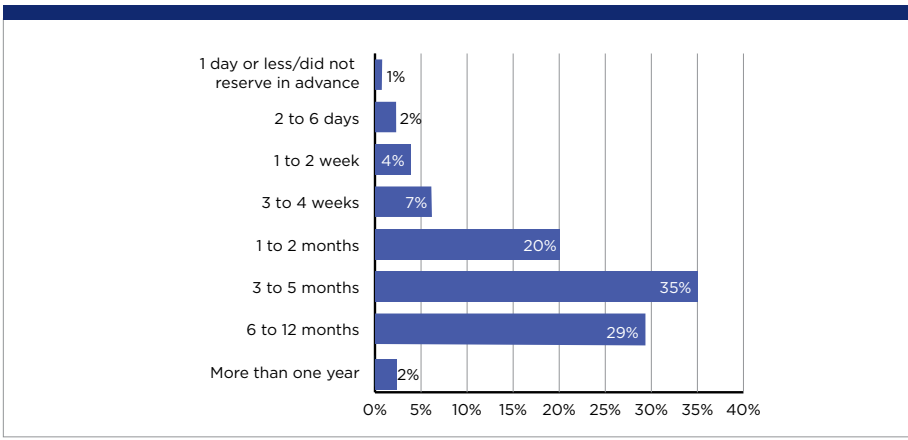
Destination Decision for Next Intercontinental Trip



Question: How far in advance of your departure date did/will you decide on the destination?
Base: Australia intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

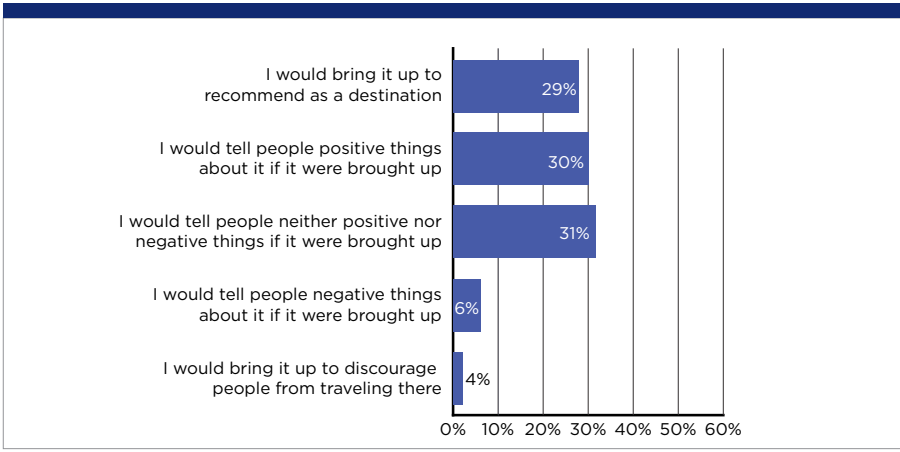
Air Booking for Next Intercontinental Trip



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box.
Base: Australia intercontinental travelers who booked /will likely book air travel (N=719). Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

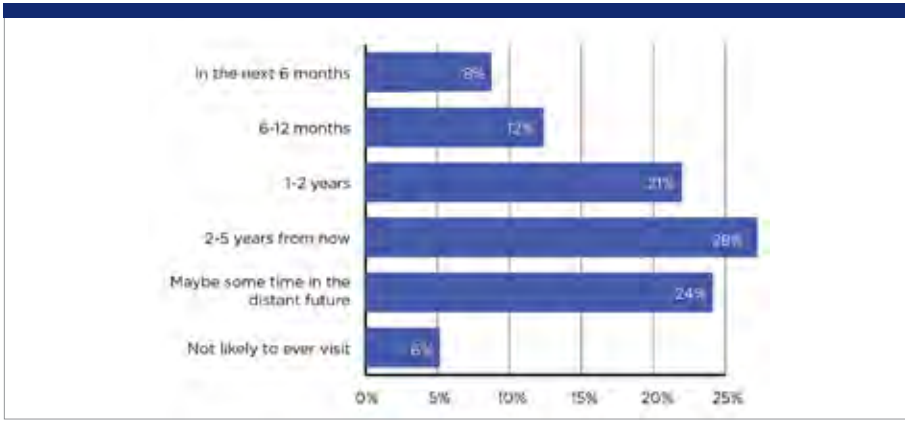
Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?
Base: Australia Intercontinental travelers 2016 (N=1030) Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

Likelihood of Travel to the USA



Question: When, if ever, are you likely to visit the following countries? United States of America.
Base: Australia Intercontinental travelers 2017 (N=1030).

Source: Brand USA Market Intelligence Study 2017.

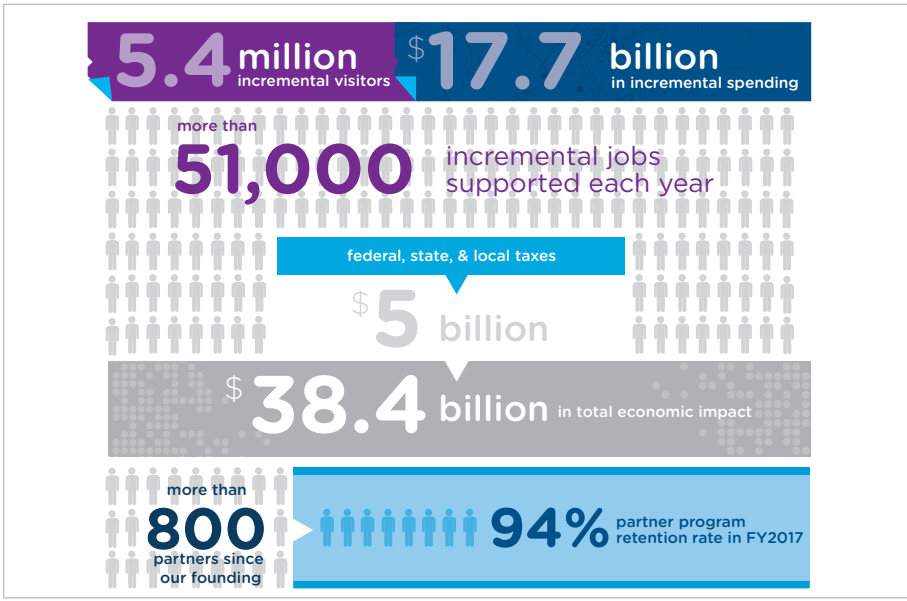
Brand USA Highlights

Brand USA is building on success.

With the support of its many partners worldwide, Brand USA has grown from a start-up organization (that launched its first full year in operation in 2012 with just 89 partners) to an organization that has worked with and been supported by over 800 partners worldwide.

Here is some of what we've accomplished with the support of our partners since we began operations in 2011:

- Generated 5.4 million incremental international visitors to the USA over the past five years, which has benefited the U.S. economy with $38.4 billion in total economic impact, and supported more than 51,000 incremental jobs a year (source: Oxford Economics).



Sources: ROI data provided by Oxford Economics.
Partner and partner program retention data provided by Brand USA internal reporting.

- Increased active consumer engagement with Brand USA assets (website page views, social interaction and social ad engagement) by 29 percent in FY2017.
- Continued to execute the USA consumer campaign in 14 markets (Australia,

Brazil, Canada, Chile, China, Colombia, France, Germany, India, Japan, South Korea, Mexico, Sweden, and the United Kingdom Colombia and Sweden). In total, these markets generate more than 80 percent of all international visitation to the United States.

- With the launch of a "social first" storytelling approach in 14 markets, including OOH, OLV, digital display, social, search, native, and influencer media, the "GO" campaign resulted in almost 6.5 billion impressions.
- Brought 23 percent more members of the travel trade to the USA via our three MegaFams, which included 287 travel agents (of which 49 were product developers) from three countries (China, United Kingdom & Ireland, and Mexico).
- Hosted three sales missions (to India, Japan/Korea and China) with 108 U.S. delegates who promoted their travel brands and destinations to more than 1,618 Buyers.
- Leveraged $52.5 million in contributed media from 35 global media partners, plus an additional $5.7 million of in-kind contributions, to promote travel to the USA directly to consumers in numerous international markets. This compares to $49 million in contributed media from 29 global media partners in FY2016.
- Increased earned media exposure for corporate media relations efforts by 41 percent over FY2016, reaching 2.7 billion impressions and an ad equivalency of nearly $230 million in FY2017.
- Generated more than $100 million in industry contributions, including cash contributions of $43.5 million (compared to $53 million in FY2016) an in-kind contributions of$66.3 million (compared to $47 million in FY2016) in recognized revenue—representing 40 percent in cash contributions and 60 percent in in-kind contributions for the year.
- Grew Brand USA's partnership network from 707 in FY2016 to 851 partners through FY2017 (a 20 percent increase).

By all these measures and more, Brand USA's marketing efforts are working—effectively and efficiently.

Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA's cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets, including:

- Argentina
- Australia
- Austria
- Bahamas
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- France
- Germany
- Guatemala
- Honduras
- Hong Kong
- India
- Ireland
- Italy
- Japan
- South Korea
- Mexico
- Netherlands
- New Zealand
- Nicaragua
- Norway
- Panama
- Peru
- Qatar
- Russia
- Singapore
- Spain
- Sweden
- Switzerland
- Taiwan
- Turkey
- United Arab Emirates
- United Kingdom
- Venezuela

Visit USA Committees, Australia and New Zealand

How Brand USA Works with Visit USA Committees

Brand USA works in collaboration with Visit USA committees around the world to promote the United States as a premier travel destination. These committees organize a wide range of promotional activity, including travel trade and consumer fairs, workshops and programs for travel agents, newsletters, and more.

Visit USA committees are managed by voluntary members with an interest in promoting and selling travel to the United States. Brand USA collaborates with Visit USA committees and supports activities that align with Brand USA's objectives and marketing strategies. In addition, Brand USA makes use of the in-market expertise of Visit USA committees, in markets where Brand USA has established international representation and in select markets where the organization is not currently represented.

Visit USA Committee Contacts:

Visit USA Committee, Australia
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president@visitusa.org.au

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Visit USA Committee, New Zealand
Corey Marshall
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Claire Reynolds
Vice Chair
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About the U.S. Commercial Service

The U.S. Commercial Service (USCS) is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration (ITA). The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States.

As America's largest service export, travel and tourism is a key sector for the USCS. The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers to attract international visitors and to grow international arrivals. This assistance can include: trade counseling, market research, vetting of potential partners, outreach to wholesale buyers, and support with international sales calls/trade shows/visits. Our specialists in Australia and New Zealand can be reached at the contact details below.

Contact:

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Commercial Specialist
Head of Section
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Our Partnership with the U.S. Department of Commerce

Brand USA collaborates closely with the International Trade Administration, U.S. Department of Commerce, through its National Travel and Tourism Office (NTTO) and U.S. Commercial Service Offices in international markets.

In addition, Brand USA works in close partnership with Visit USA committees in market and more than 800 contributing partners throughout the world to implement highly successful campaigns that are inspiring an increasing number of travelers to visit the USA.

The National Travel and Tourism Office (NTTO)

The NTTO is the federal liaison to Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA's annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal partners.

The NTTO also serves as the official source of national travel and tourism statistics to inform policy and private-sector decision making. These data are used by the Bureau of Economic Analysis to calculate the balance of payments for travel and tourism and measure the economic impact of international visitation to the United States. Furthermore, NTTO advances polices that support travel and tourism export growth and addresses export barriers in key international markets.

Contact:
The NTTO is located in the International Trade Administration of the Department of Commerce.
14th & Constitution Avenue, NW,
Washington, DC 20230.
202.482.0140
ntto@trade.gov

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TheBrandUSA.com



FY18 Campaign Results

Adara

October 1, 2017 - April 2, 2018

$21.6 million

In hotel revenue from trackable bookings within the Adara ecosystem

(media only)

Overall Results

56,431

Hotel Bookings

86,527

Flight Bookings

Overall Results

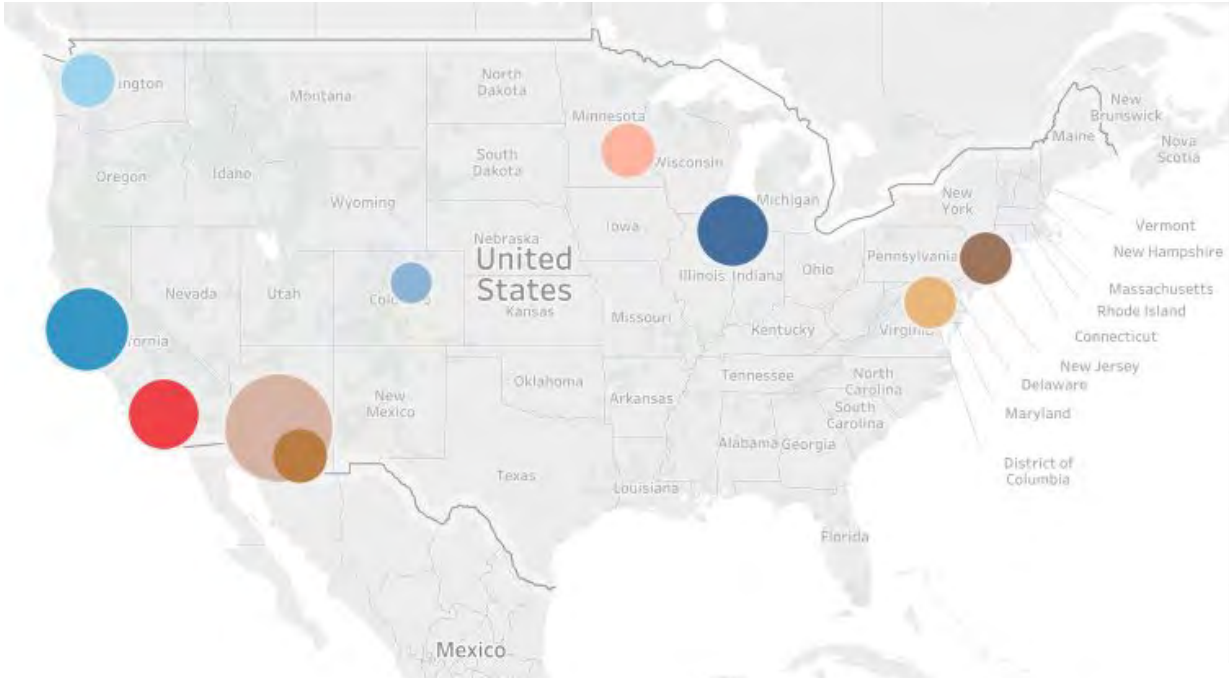
93,941

Travelers

$173

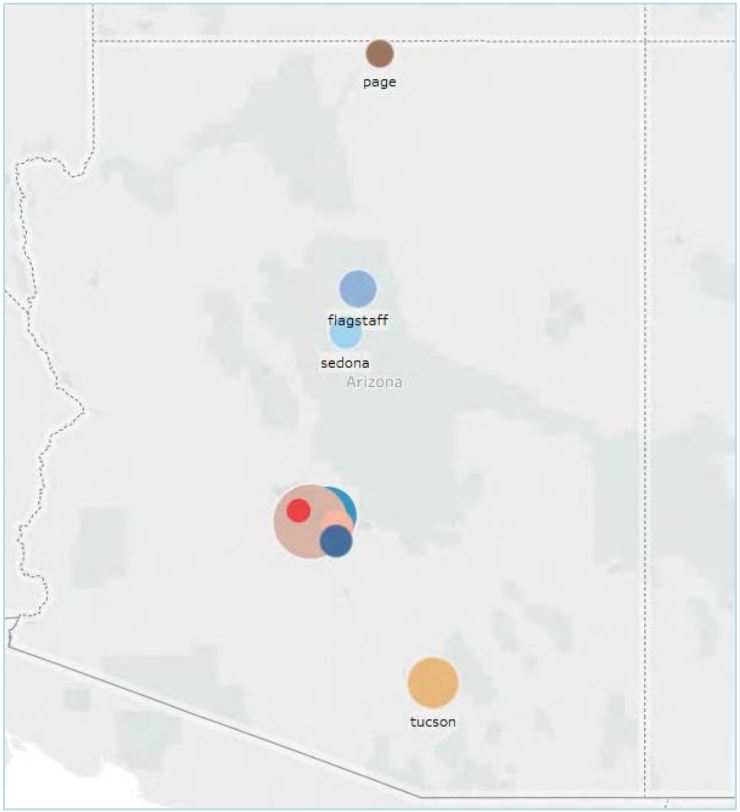
Average Daily Rate

Top 10 Hotel Origin Markets



City	% of Booking
Phoenix	15
San Francisco Bay Area	8.8
Chicago	6.5
Los Angeles	6.3
Seattle-Tacoma	4
Minneapolis-St Paul	3.8
Tucson	3.8
New York	3.5
Washington DC	3.4
Denver	2.2

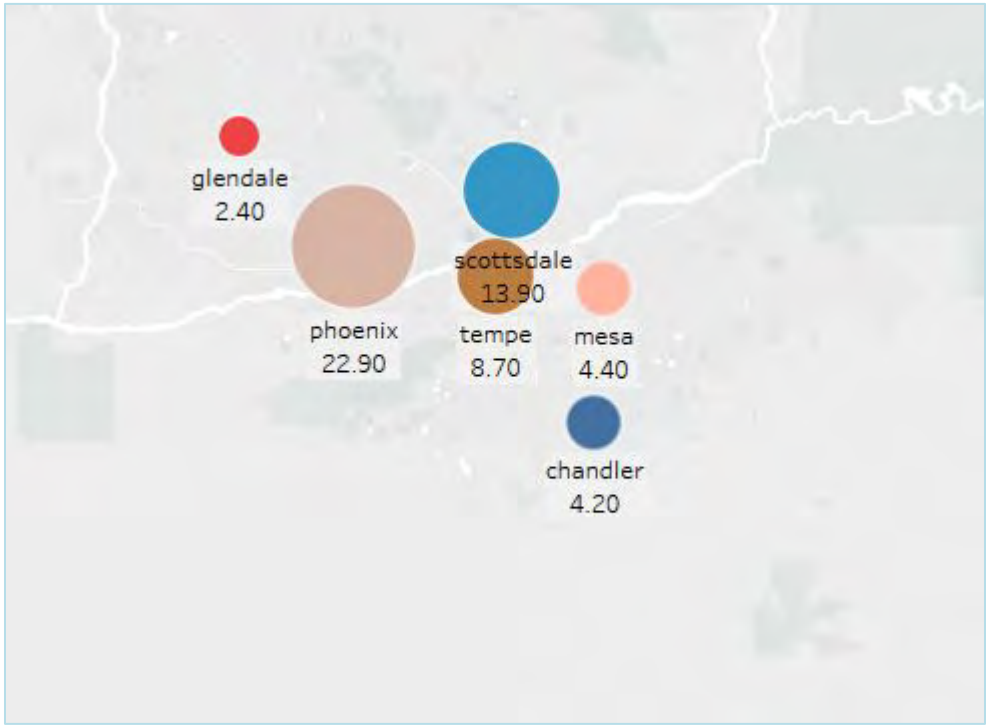
Top 10 Hotel Destinations



City	% of Booking
Phoenix	22.9
Scottsdale	13.9
Tucson	10.8
Tempe	8.7
Flagstaff	5.8
Mesa	4.4
Sedona	4.4
Chandler	4.2
Page	3.2
Glendale	2.4

Top 10 Hotel Destinations -

Phoenix Metro Area

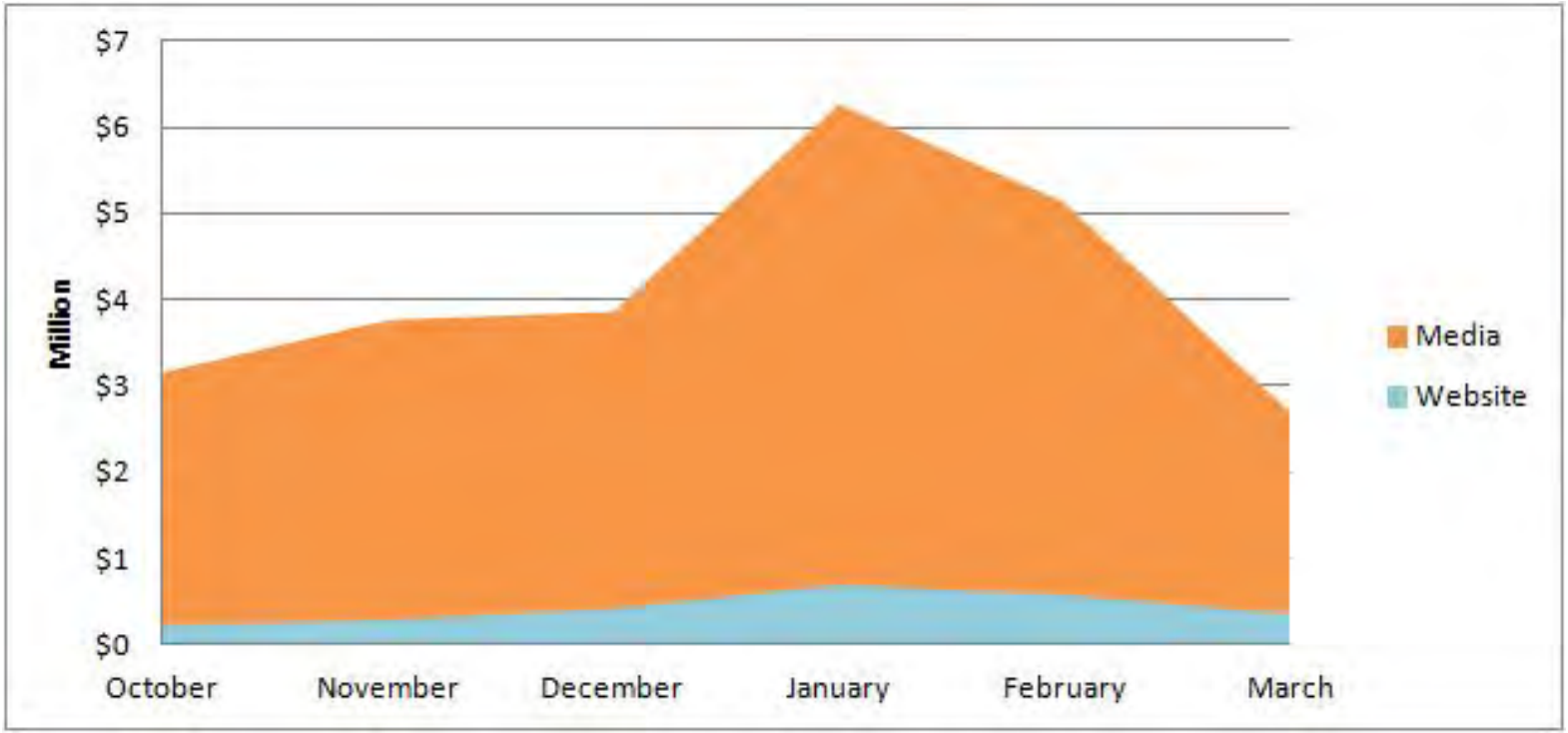


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Glendale	2.4

Campaign Performance

Pixel Group Name (Campaigns)	Bookings	ADR	Total Revenue	Revenue per 1000 impressions	Revenue per Dollar of Ad Spend (Digital)
AZ Expedition - FY18	2859	$182.28	$1,156,475.98	$68.08	$2.16
National - FY18	34141	$171.39	$12,954,126.93	$678.95	$33.22
Target Cities - FY18	13862	$182.87	$6,065,908.22	$538.62	$42.05

Hotel Revenue from Digital Ad-Exposed Visitors



Media Channel Performance

Upper Funnel Channels

Pixel Group Name (Tactics)	Bookings	ADR	Total Estimated Travelers	Total Estimated Nights	Total Revenue	Revenue per 1000 impressions	Revenue per Dollar of Ad Spend (Digital)
National Geographic Traveler	2021	$181.71	3393	4410	$801,333.92	$67.73	$4.59
Outside Magazine	799	$172.45	1267	1744	$300,807.69	$142.21	$1.76
Saveur	334	$212.23	522	835	$177,214.98	$58.27	$1.42

Lower Funnel

Pixel Group Name (Tactics)	Bookings	ADR	Total Estimated Travelers	Total Revenue	Revenue per 1000 impressions	Revenue per Dollar of Ad Spend
TripAdvisor	13133	$176.09	26279	$4,750,673.05	$1,117.16	$79.18
Priceline	8160	$168.58	12832	$3,203,967.10	$875.04	$72.41
Expedia	18336	$176.19	31946	$7,598,359.16	$834.68	$94.98
ADARA	3854	$199.77	5755	$1,878,806.26	$406.67	$46.97
Sojern	10799	$158.76	17284	$3,965,508.36	$268.86	$66.09

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FY18 Advertising Effectiveness Research

June 2018

insights
Strategic Marketing and Research

Contents

Section	Slide
Background, Objectives	3
Methodology	4
The Advertising Campaign	5
Insights	8
Competitive Position & Market Analysis	11
Advertising Awareness	16
Creative Ratings	30
Advertising Impact & ROI	38
Appendix: Questionnaire	47

Background & Objectives

- As the agency responsible for influencing leisure travel and spending in the state, the Arizona Office of Tourism (AOT) developed and deployed a paid media campaign across the United States, including targeted spot markets. The placements included creative that was a continuation of the AZ Expedition campaign deployed in FY16 & FY17 as well as the new UnRealAZ campaign.
- In order to be accountable for the resources invested in these efforts, AOT has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing.
- The specific objectives of this seasonal awareness research are to:
  - Measure the reach of the advertising among targeted markets;
  - Evaluate the efficiency of the marketing through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
  - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
  - Assess the ability of the advertising to improve the image of the state and increase visitation;
  - Calculate the number of influenced trips, visitor spending, and return on investment of the campaign; and
  - Forward insights into future refinement of the marketing.

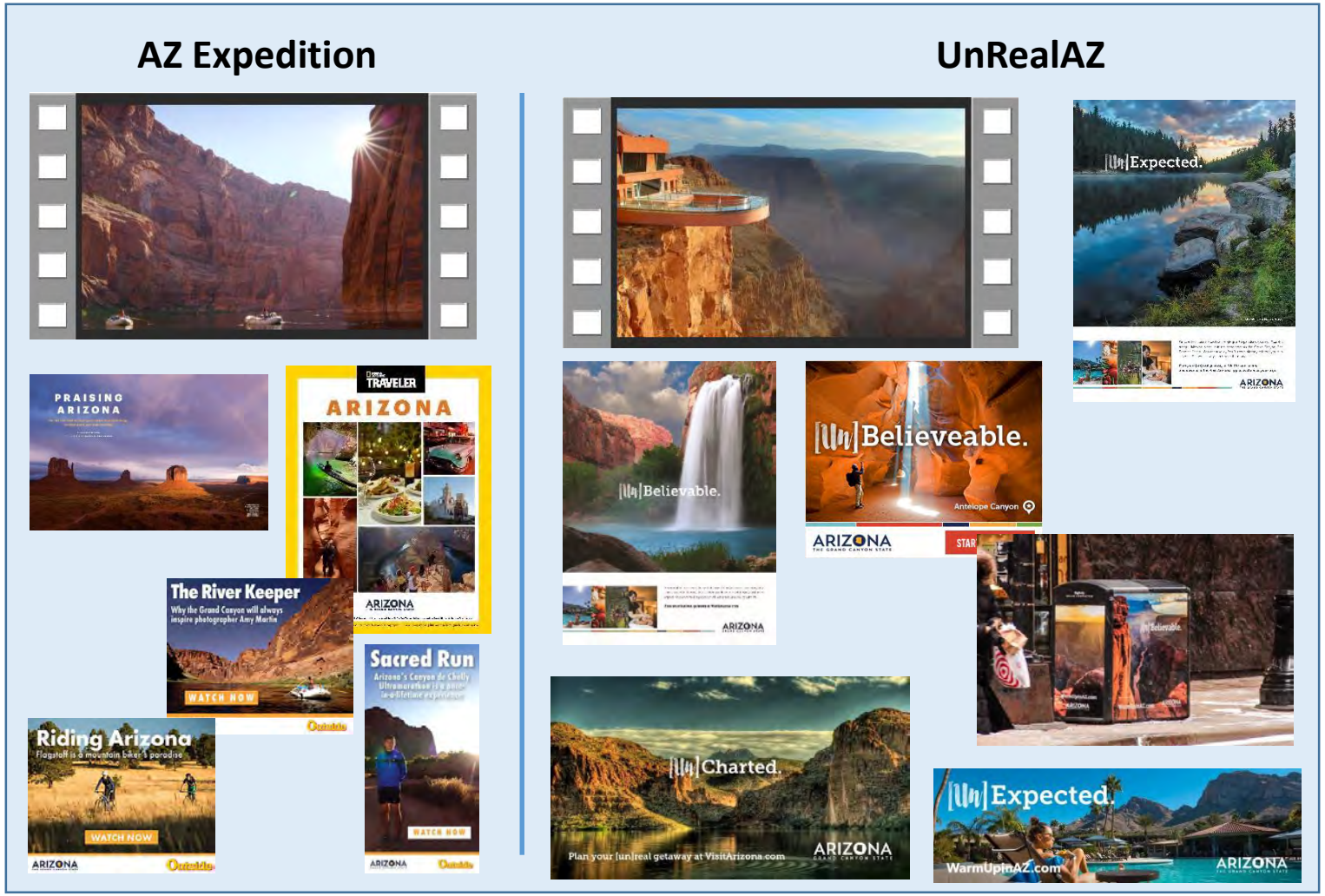
Methodology

- The fundamental tenet of this research is that advertising impact can be assessed by comparing the attitudes and behaviors of those who have not seen the advertising to the attitudes and behaviors those who have. For this to work, it is necessary to accurately assess advertising awareness. Thus, SMARInsights utilizes an online survey that allows the respondents to view the ads used in the campaign. This approach also allows the audience to provide reactions to the creative immediately after viewing.
- Respondents were screened to be responsible for travel decision-making in their household and to normally take an overnight leisure trip or day leisure trip at least 50 miles from their home at least once a year.
- In total, 3,185 surveys were completed in May 2018.
- While Chicago, San Francisco, Seattle, and Minneapolis received targeted investment, New York is evaluated separately to understand the potential for the market.
- Upon completion of data collection, an SPSS dataset was prepared for analysis.
- A copy of the questionnaire is included in the Appendix of this report.

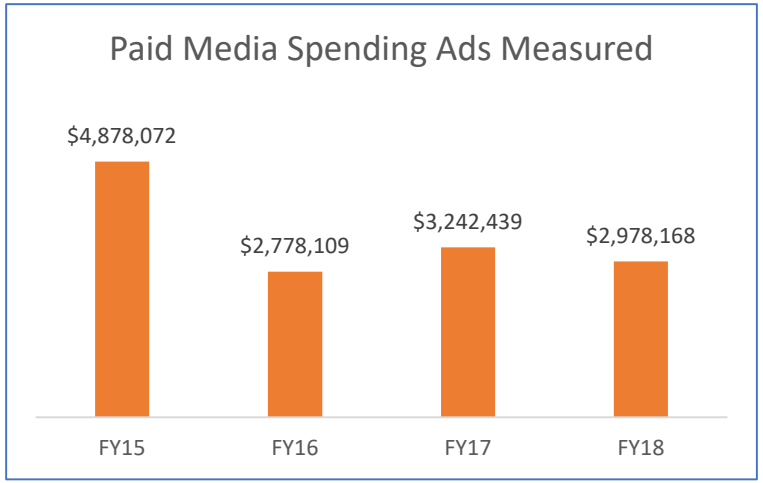
	Completed Surveys
Chicago	521
San Francisco	520
Seattle	512
New York	414
Minneapolis	519
National	699
Total	3,185

The FY18 Advertising Campaign

- After having the AZ Expedition campaign in the marketing for the past two fiscal years, AOT introduced new creative with the UnRealAZ campaign. However, throughout the fiscal year, elements from both campaigns were placed through print, digital banners, TV/video, and paid social. These channels were national in potential reach. Additional components of the UnRealAZ campaign included out-of-home and radio in spot markets.
- The FY18 campaign ran from October 2017 to March 2018.
- The complete collection of advertising used in the survey instrument is included in the Appendix of this report.



Ad Spending by Year



- Investment in the paid media campaign fell slightly, primarily attributable to the decrease in digital and out-of-home allocations.
- Not only was the out-of-home investment smaller, but it also was spread across more markets. The FY17 investment of nearly $1 million was targeted to only three markets. The FY18 investment is 40% less and is spread among four target markets.

Medium	FY15	FY16	FY17	FY18	% Change from FY17
Digital banners	$2,430,131	$622,665	$1,268,064	$897,072	-29%
Print	$1,390,791	$707,042	$657,940	$728,475	11%
Out-of-home	$651,550	$1,002,972	$906,435	$531,263	-41%
TV/video	$405,600	$250,000	$410,000	$410,410	0%
Social media	$0	$195,430	$0*	$335,950	NA
Radio	NA	NA	NA	$75,000	NA
Total	**$4,878,072**	**$2,778,109**	**$3,242,439**	**$2,978,168**	**-8%**

*AOT ran social media ads in FY17, but they were not included in the research.

FY18 Ad Spending by Medium by Market

Medium	Chicago	San Francisco	Seattle	Minneapolis	National	Total
Digital	$37,435	$34,075	$31,852	$30,885	$762,825	$897,072
Print	$22,500	$52,500	$19,600	$22,500	$611,375	$728,475
Out-of-home	$222,175	$167,529	$126,559	$15,000	$0	$531,263
TV/video	$2,500	$2,500	$2,500	$2,500	$400,410	$410,410
Social media	$0	$0	$0	$0	$335,950	$335,950
Radio	$18,750	$18,750	$18,750	$18,750	$0	$75,000
Total	**$303,360**	**$275,354**	**$199,260**	**$89,635**	**$2,110,559**	**$2,978,168**

- Although a handful of markets receive targeted investment, 70% of the paid media investment is allocated to a national buy that has the ability to reach consumers across the U.S.

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Insights

The following section summarizes the key research insights in terms of advertising performance and strategic considerations.

Insights – Advertising Performance

Advertising Awareness

- Overall, the FY18 AOT advertising campaign achieved 43% awareness, reaching about 43 million leisure traveling U.S. households. AOT spent $0.08 per household reached, indicating a better-than-average media buy efficiency compared to SMARInsights' benchmark of $0.21.
- Recall and reach increased in spite of the introduction of a new campaign, combined with less investment. This is rarely the case as SMARInsights often sees DMO campaigns requiring increased investment to maintain a steady level of recall when new creative is introduced.
- Advertising awareness is highest in Chicago (56%), a market AOT has consistently targeted for a number of years. Across all target markets, the increase in recall is attributable to increases in the reach of print and out-of-home. Paid social also pushed awareness higher. If not for this investment, awareness in other parts of the U.S. outside of the spot markets would have been lower than in FY17.

Creative Ratings

- The FY18 creative receives ratings above the top 10% benchmark level on almost all specific attributes tested. However, there was a slight decline in the ratings for most of the attributes. Because FY18 media placements included both AZExpedition and UnRealAZ creative, there isn't a clear measure on just the new creative.
- Before developing the UnRealAZ campaign, AOT conducted both creative and image testing. The final UnRealAZ creative combines components of other executions that received positive feedback from consumers with the UnRealAZ messaging. In the creative testing process, the UnRealAZ campaign received ratings slightly lower than other creative against which it was measured. However, UnRealAZ tested higher for "being inspiring." Similarly, the FY18 creative garners higher ratings than past years for showing unique Arizona experiences.

Advertising Impact & ROI

- Across the targeted spot markets and other parts of the U.S., the campaign positively influenced travel to the state, generating more than 564,000 trips to the state, up 14% from FY17. This, combined with less paid media investment, resulted in an ROI of $331, a 29% increase from the previous year.
- Of the targeted spot markets, the influenced trips and subsequent visitor spending is highest in Chicago, a consistent market for paid media investment. However, Minneapolis had the highest ROI due to the limited investment in the market.

Insights – Strategic Considerations

Competitive Position

- Arizona competes with the most well known and well traveled brands in the country. For this reason, it has a weaker position than much of the competitive set.
- While paid marketing can and does improve the overall image of a destination, consumers' perceptions of a place are developed over a lifetime of experiences. However, the perceptions of a place for quality of life issues can be influenced by current events. With that, the state's image as a place to live and work has declined dramatically over the past years as the state's politics have become national news.

Markets

- The advertising generates the most incremental travel from San Francisco. As the market that is least positive about the state as a leisure destination overall, paid media is able to have more influence. SMARInsights finds it is generally more difficult to generate incremental travel from markets with high rates of unaware travel, so the converse can also be true. Markets with lower travel and image have more opportunity for influence.
- Without targeted investment, the FY18 campaign was able to garner a good amount of recall and influence in New York City. Given this is an expensive market to buy, AOT is likely well served keeping it part of the national target rather than allocating already limited resources here.

Creative Development

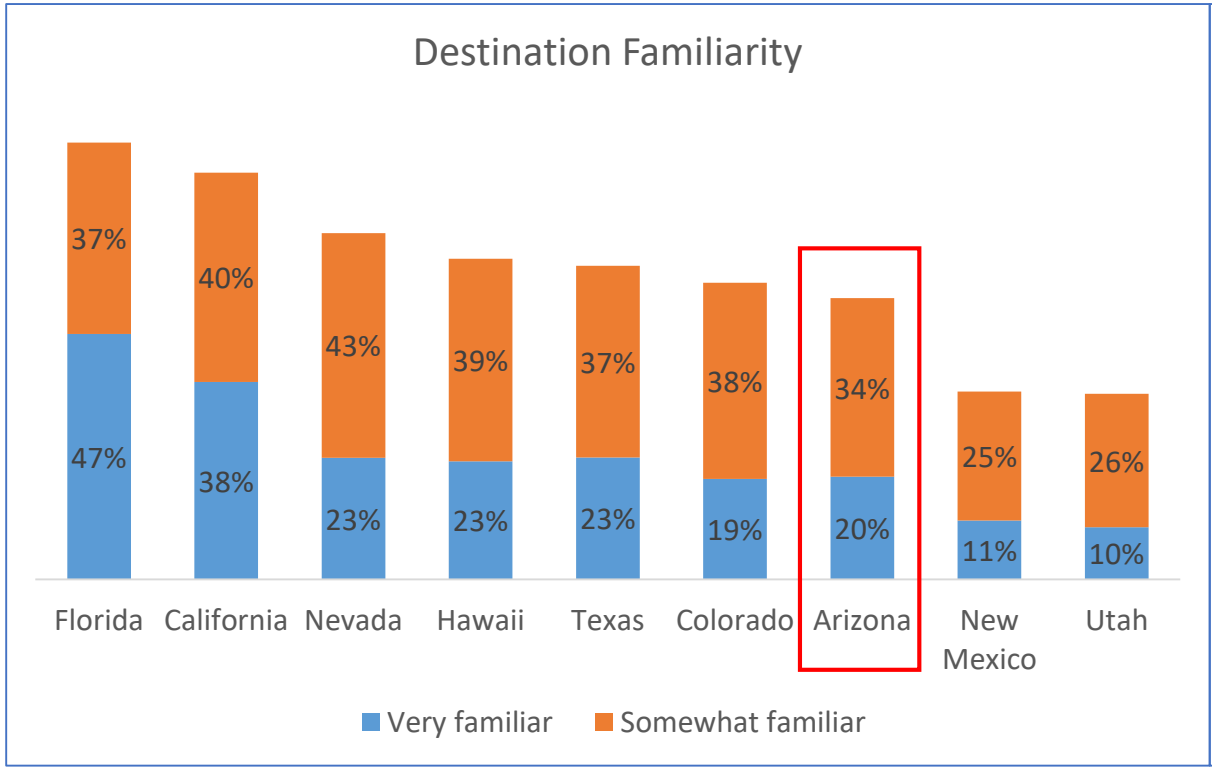
- There are a number of attributes that are highly correlated to interest in visiting for which the state performs well. However, there are others for which the state's image is weaker. By featuring these "opportunities to improve" in future creative, AOT would likely increase interest in visiting. These attributes that are drivers to visitation but on which the state falls short include:
    - Has warm, friendly and welcoming people
    - Is a good value for the money
    - Offers authentic culinary experiences

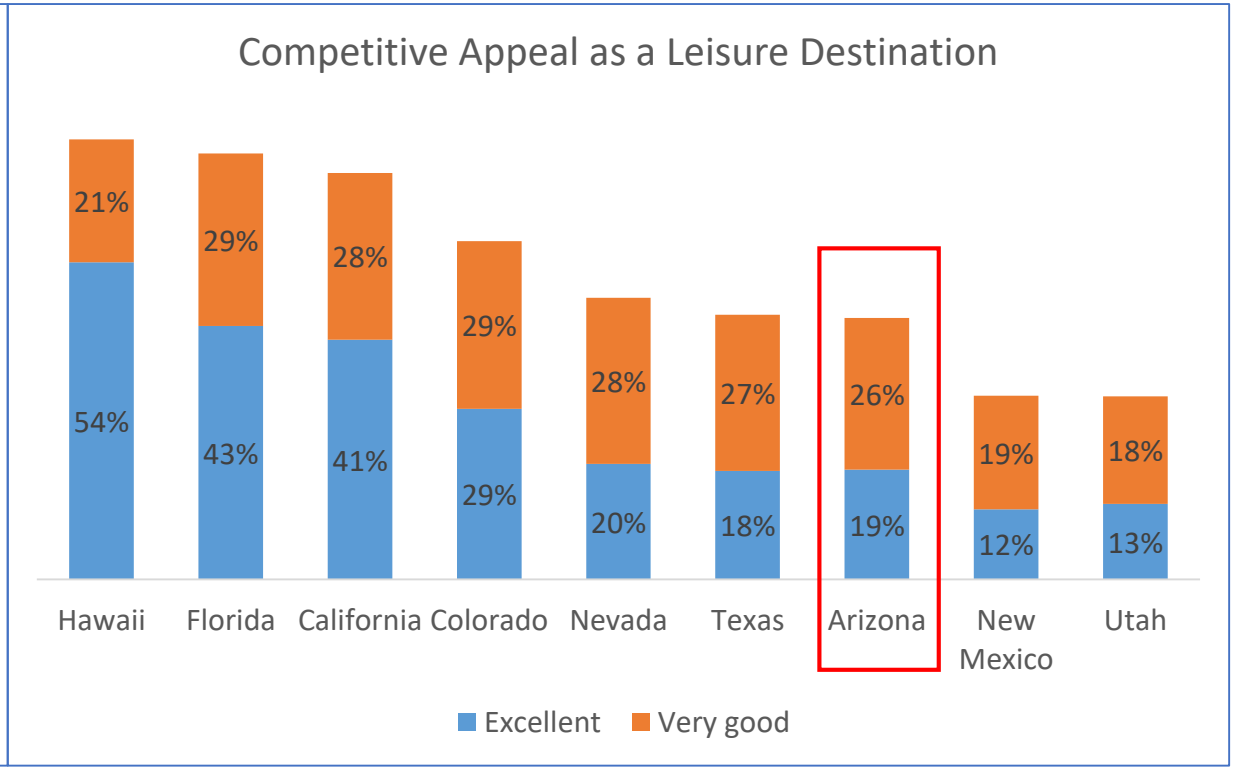
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Competitive Position & Market Analysis

Arizona places paid media in a competitive environment, with any number of other destination marketing organizations (DMOs) attempting to attract the same consumers. For that reason, it is important to understand Arizona's position among the competitive set and within the target markets.

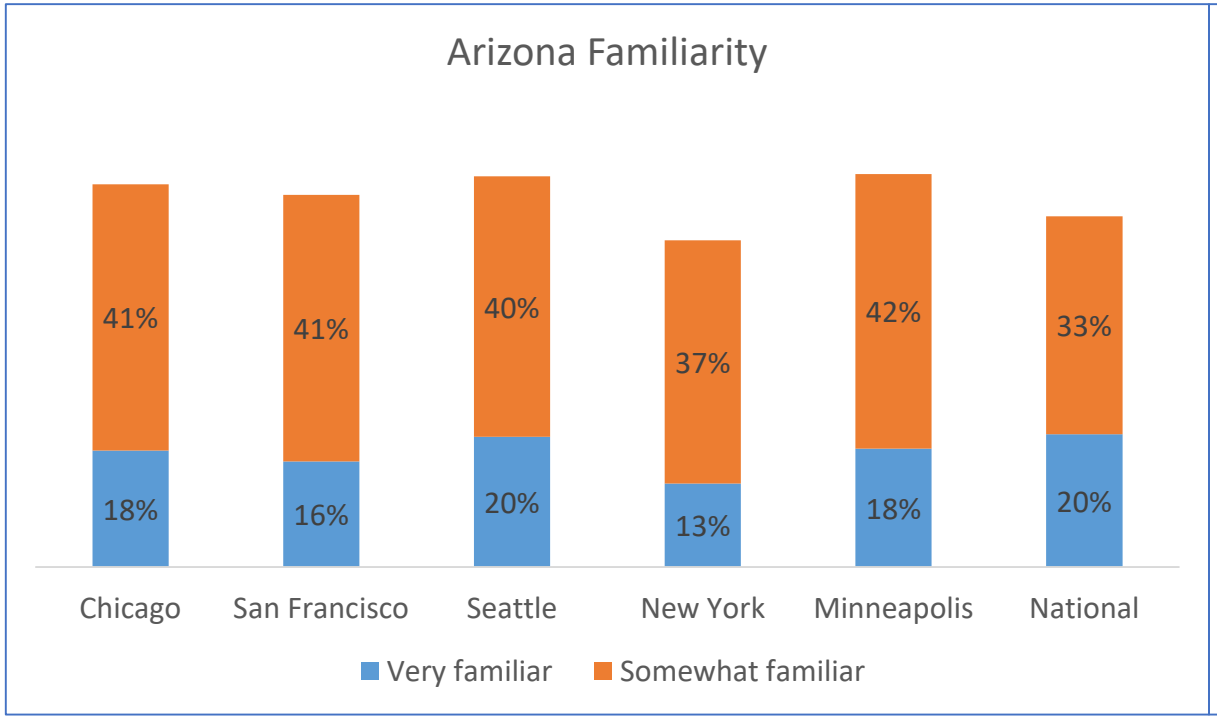
Destination Familiarity & Perception

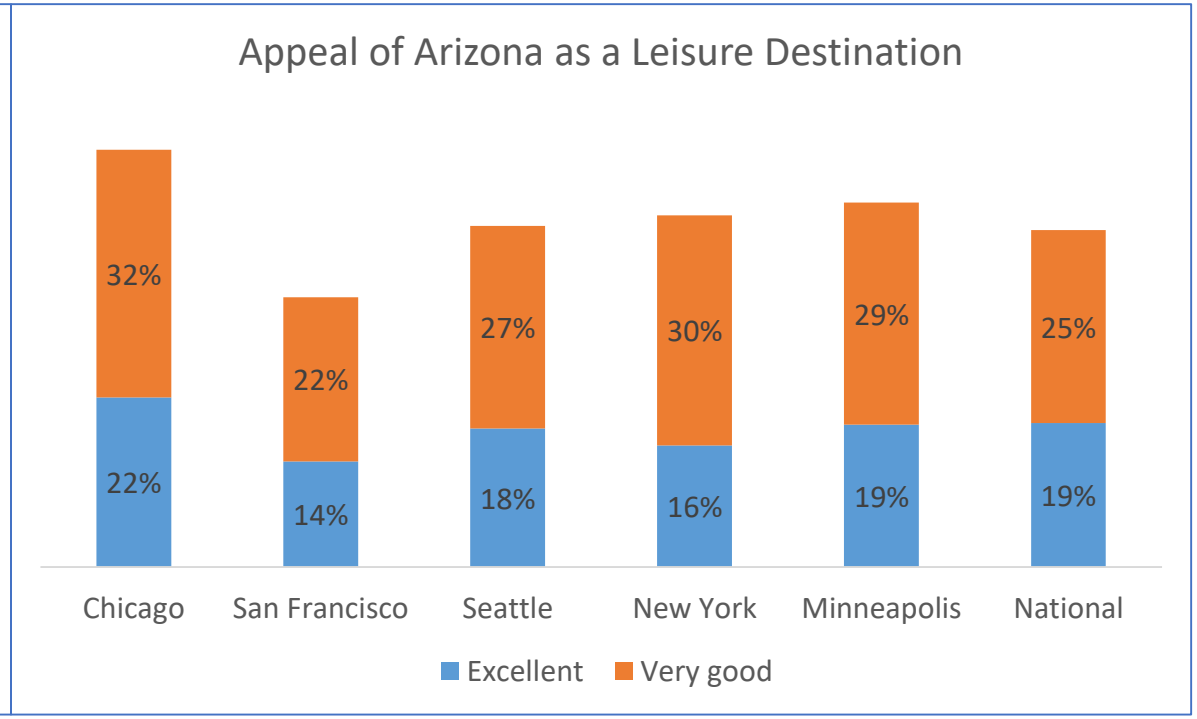




- Destination marketing not only motivates travel but also has the peripheral effect of influencing the position of the destination within the competitive set. Arizona's competitors are the states with the country's top destinations.
- Although more than half of U.S. leisure travelers are familiar with Arizona as a leisure destination, fewer find the state appealing.

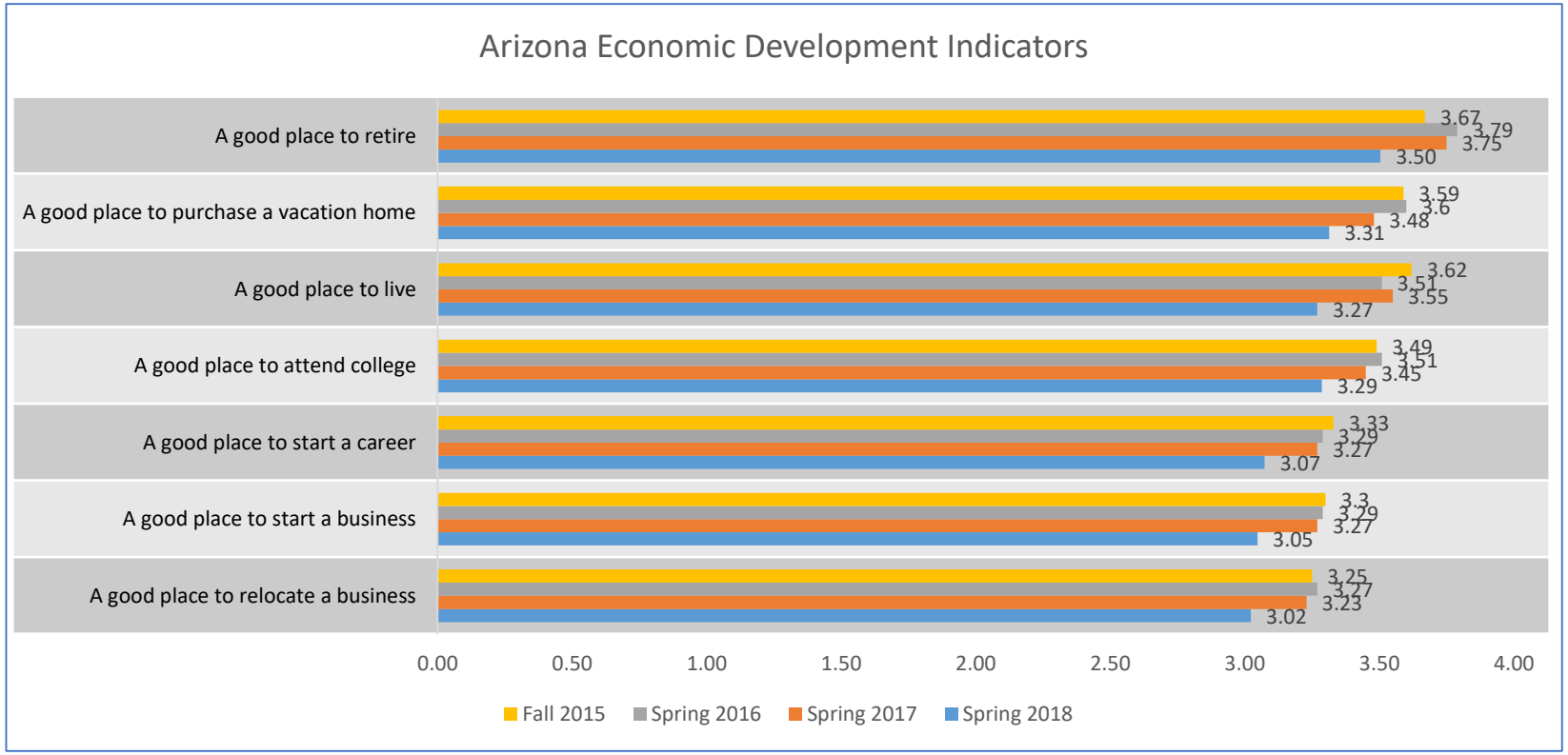
Arizona Familiarity & Perception by Market





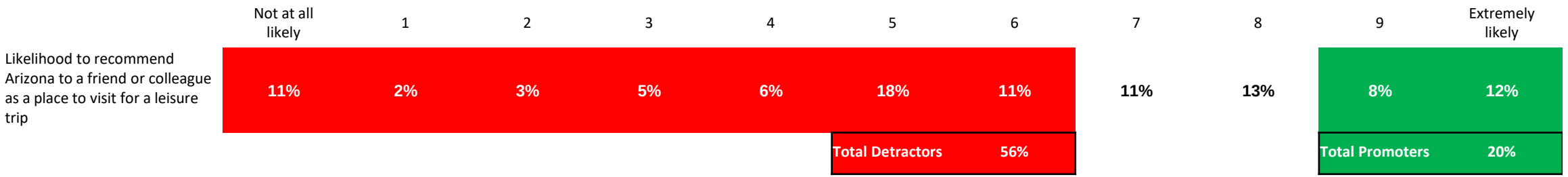
- Among the targeted spot markets, Chicago has the most positive image of Arizona. Although Chicago and Seattle have been receiving targeted investment the longest, Chicago is far more positive about the state.
- San Francisco consumers claim to be just as familiar with Arizona as other markets, but they are far less positive about the state. San Francisco has the mildest climate of the target markets, possibly tying appeal of Arizona to climate of the market.
- New York City did not receive targeted investment. And while the market is less familiar than other parts of the United States, consumers here are just as positive about the appeal of the state as a leisure destination.

Economic Development Tracking



- The image of a place as a leisure destination is made up of a lifetime of exposures – not only from DMO marketing, but also film and TV, word of mouth and even history. While this is slow to change, other parts of the economy can be more dramatically impacted by current events.
- While the perceptions of the state as a place to live and do business had been steady in recent years, there is a sharp decline for FY18.

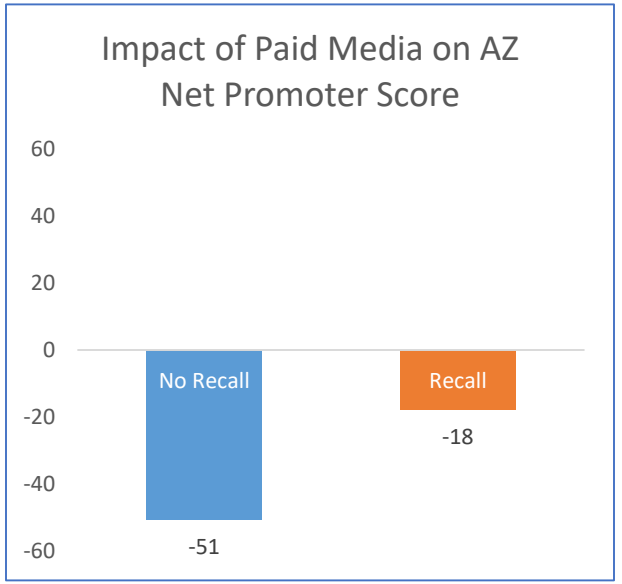
Net Promoter Score Ad Impact



NPS = -36

- Arizona's Net Promoter Score is -36 (20% "promoters" minus 56% "detractors").
- Most of Arizona's competitor states also have a negative NPS.
- The AOT advertising helps to build perceptions of Arizona, which also helps to boost NPS – but this measure is negative even among those aware of the ads.

	FY17	FY18
Hawaii	28	16
Florida	12	12
California	12	5
Colorado	-18	-20
Nevada	-29	-29
Texas	-38	-34
Arizona	-35	-36
New Mexico	-54	-53
Utah	-52	-55

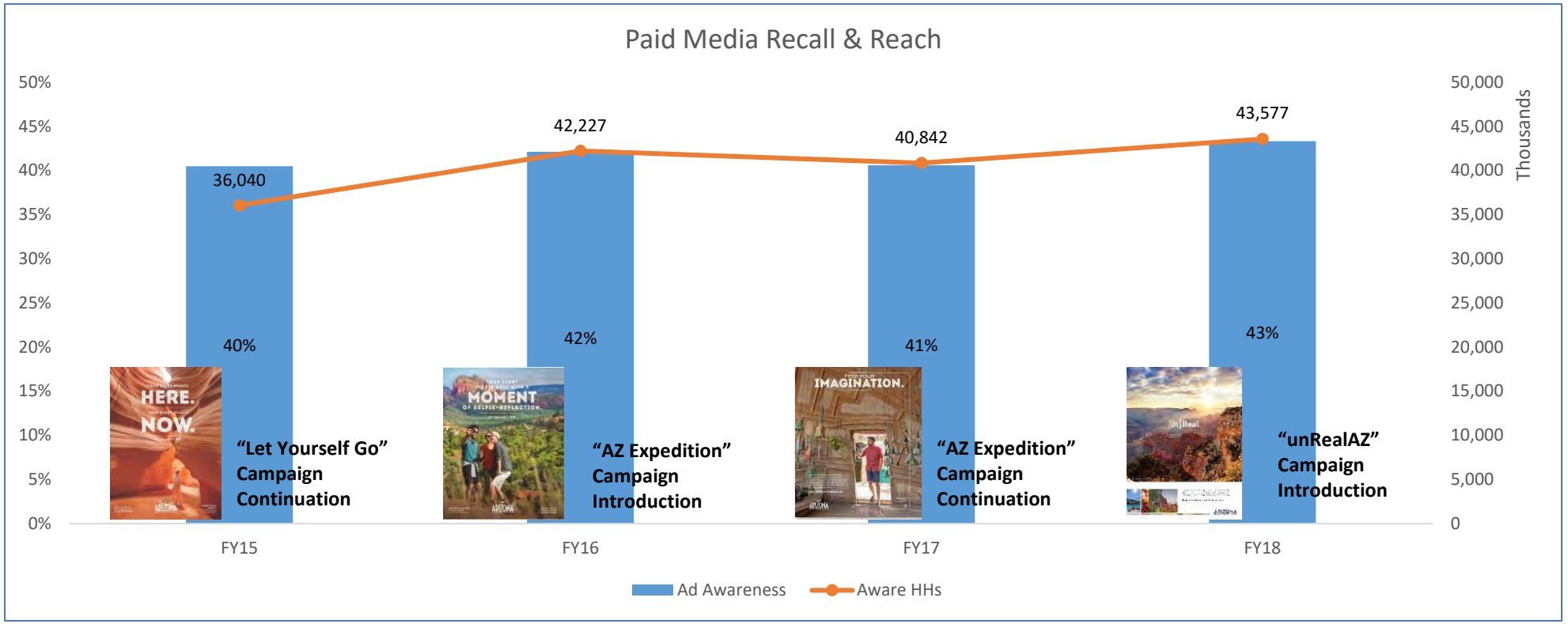


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Advertising Awareness

In order to obtain an accurate measure of aided advertising awareness, respondents were shown the actual ads that aired in their market and asked if they recalled seeing them before taking the survey.

Total Awareness & Reach



- When destination marketing organizations introduce new creative, awareness often declines if it is not accompanied by an increase in spending. However, just as happened with a new campaign in 2016, awareness and the aware households reached increased with the introduction of the UnRealAZ campaign.

Cost per Aware Household

"Let Yourself Go" Campaign

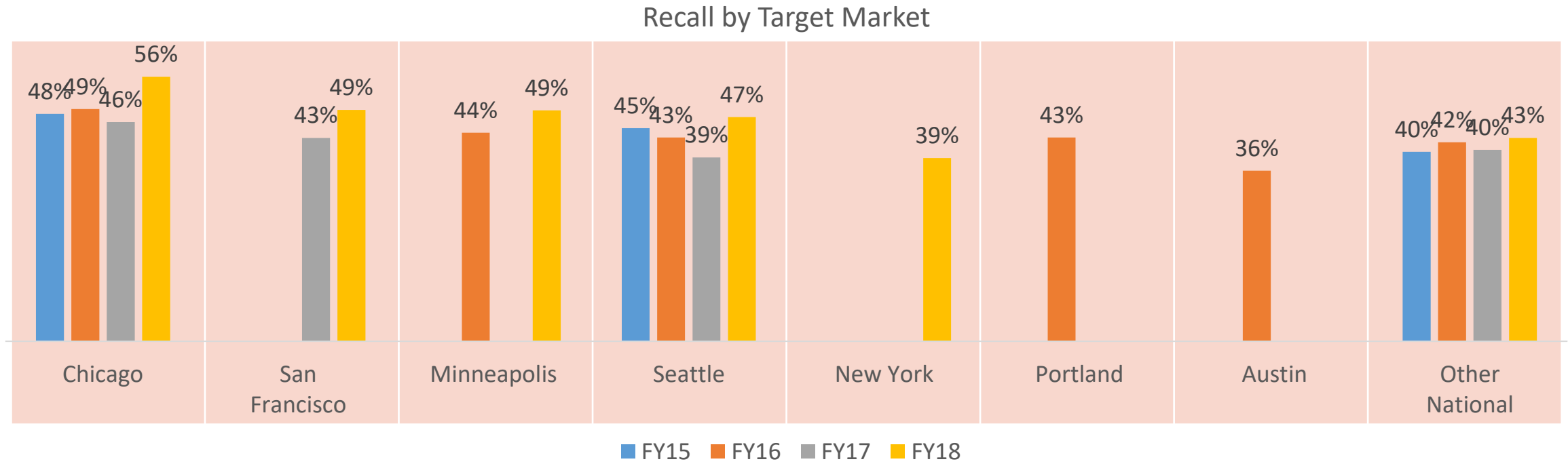
"AZ Expedition" Campaign

"UnRealAZ" Campaign

	FY15	FY16	FY17	FY18
Aware HHs	36,040,228	42,226,636	40,842,444	43,576,669
Media Spending	$4,878,072	$2,778,109	$3,242,439	$2,978,168
Cost per Aware Household	$0.14	$0.07	$0.08	$0.07

- With an increase in reach and a decline in spending, the cost to reach an aware household declined. For this measure, the lower the cost, the better the campaign performance.
- SMARInsights' benchmark cost per aware household for a state DMO national campaign is $0.21, indicating better-than-average media buy efficiency for all AOT campaigns.

Total Awareness Change by Market



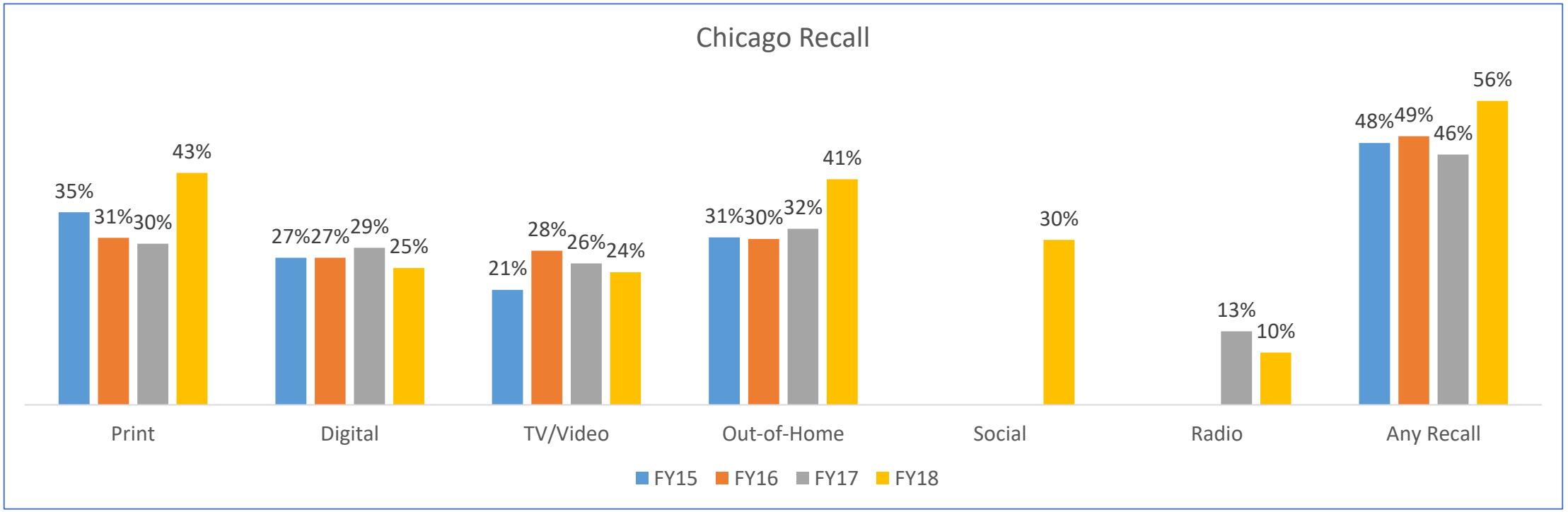
- AOT has shifted target markets in recent years, with Chicago and Seattle seeing consistent investment. Recall in all of the markets previously targeted increased in fiscal year 2018.
- While New York City did not receive targeted investment, the market had the ability to garner awareness from the national media placements. Recall in the market is slightly lower than other parts of the U.S.

FY18 Cost per Aware Household by Market

	Chicago	San Francisco	Seattle	Minneapolis	New York	Other National
Targeted HHs	3,073,608	1,593,635	2,189,344	1,528,080	6,445,300	85,767,818
Recall	56%	49%	47%	49%	39%	43%
Aware HHs	1,716,737	778,142	1,035,728	744,902	2,490,937	36,810,222
Total	$303,360	$275,354	$199,260	$89,635		$2,110,559
Cost per Aware HH	**$0.18**	**$0.35**	**$0.19**	**$0.12**	**NA**	**$0.06**
FY17 CPH	$0.30	$0.59	$0.36	NA	NA	$0.05

- Among the spot markets, Minneapolis was the most efficient. SMARInsights has measured hundreds of DMO campaigns, and the average cost to reach an aware household in spot markets is $0.57. Given this, all of the spot markets targeted in FY18 are efficient at reaching the intended audience.
- SMARInsights' benchmark for a national campaign is $0.21, so the reach of the campaign across other parts of the U.S. is very efficient.

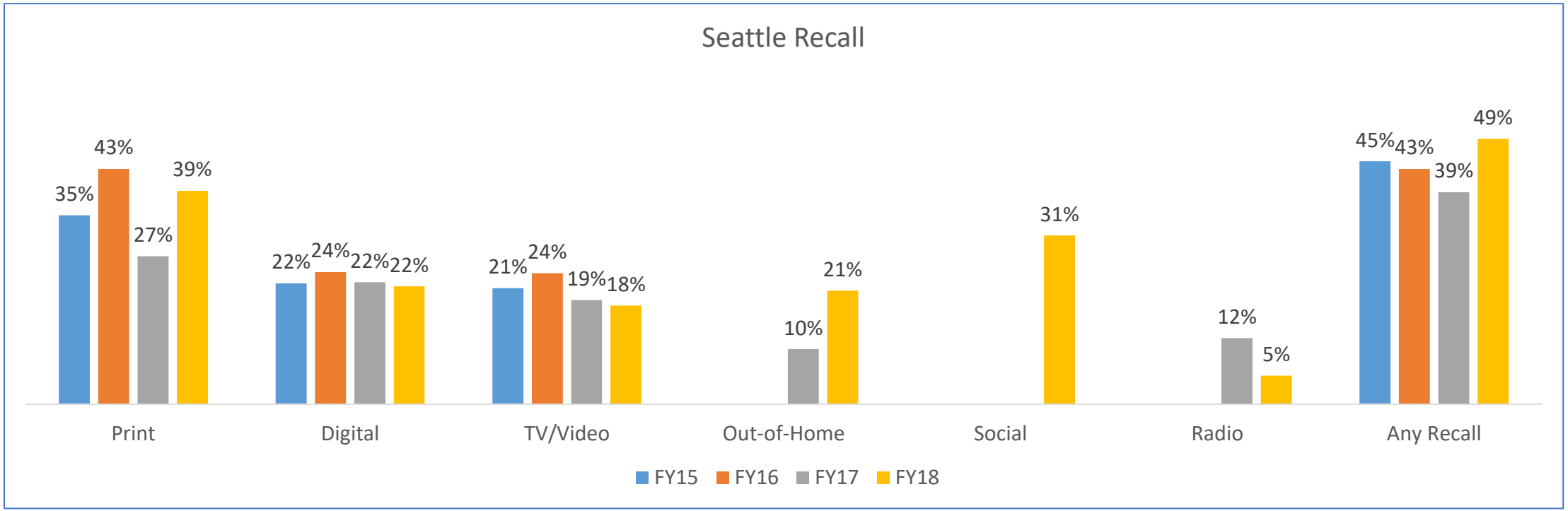
Chicago Recall



- Recall in Chicago increased overall, primarily attributable to increases in reach of print and out-of-home media.

Chicago	FY15	FY16	FY17	FY18
HHs	2,999,545	3,062,498	3,073,608	3,073,608
Awareness	48%	49%	46%	56%
Aware HHs	1,443,737	1,511,533	1,422,551	1,716,737
Media Spending	$473,377	$428,582	$421,006	$303,360
Cost per Aware HH	$0.33	$0.28	$0.30	$0.18

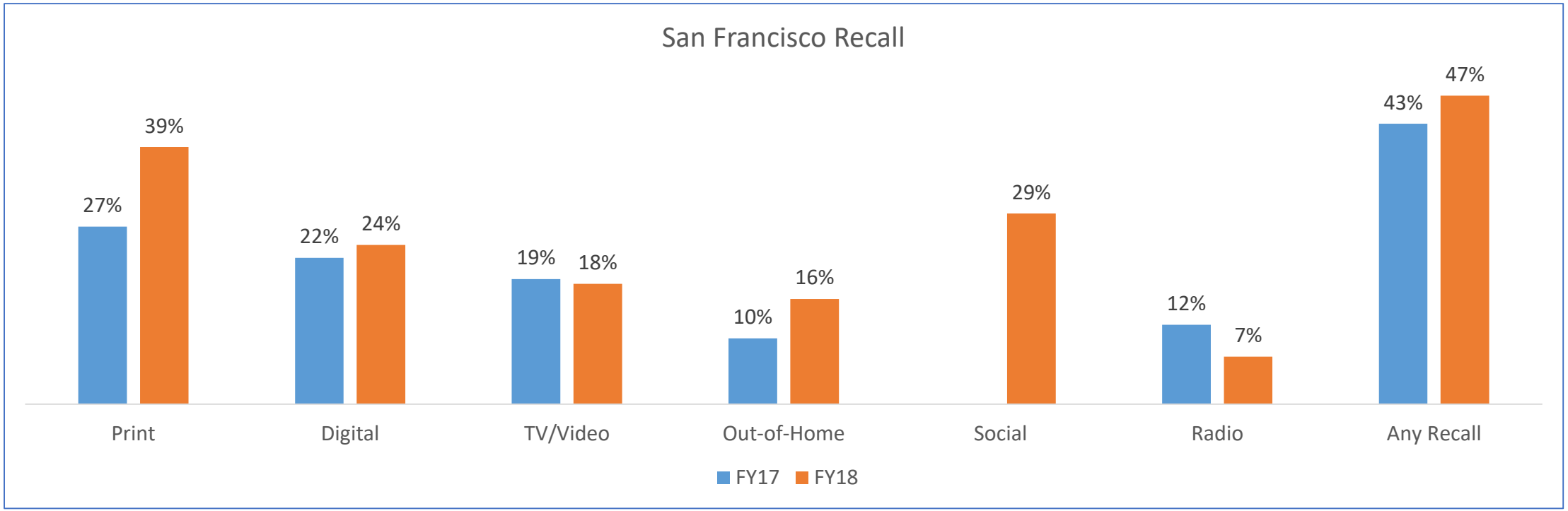
Seattle Recall



- Seattle also had increases in print and out-of-home, but there was significant reach of the social paid media as well.

Seattle	FY15	FY16	FY17	FY18
HHs	1,555,235	1,587,875	1,593,635	2,189,344
Awareness	45%	43%	39%	47%
Aware HHs	695,321	687,534	618,408	1,035,728
Media Spending	$526,108	$349,323	$222,766	$199,260
Cost per Aware HH	$0.76	$0.51	$0.36	$0.19

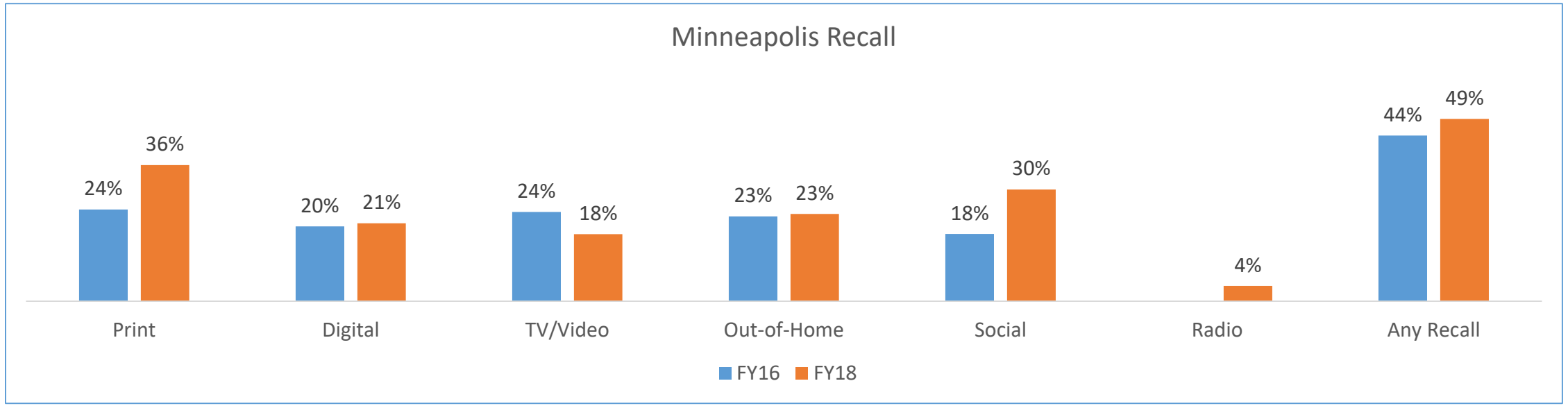
San Francisco Recall



- In the spot markets, out-of-home receives the most investment. However, print and social also have national media buy components that have the ability to reach the spot markets.
- With this, print and social have the most recall in San Francisco.

San Francisco	FY17	FY18
HHs	2,189,344	1,593,635
Awareness	43%	49%
Aware HHs	939,721	778,142
Media Spending	$555,966	$275,354
Cost per Aware HH	$0.59	$0.35

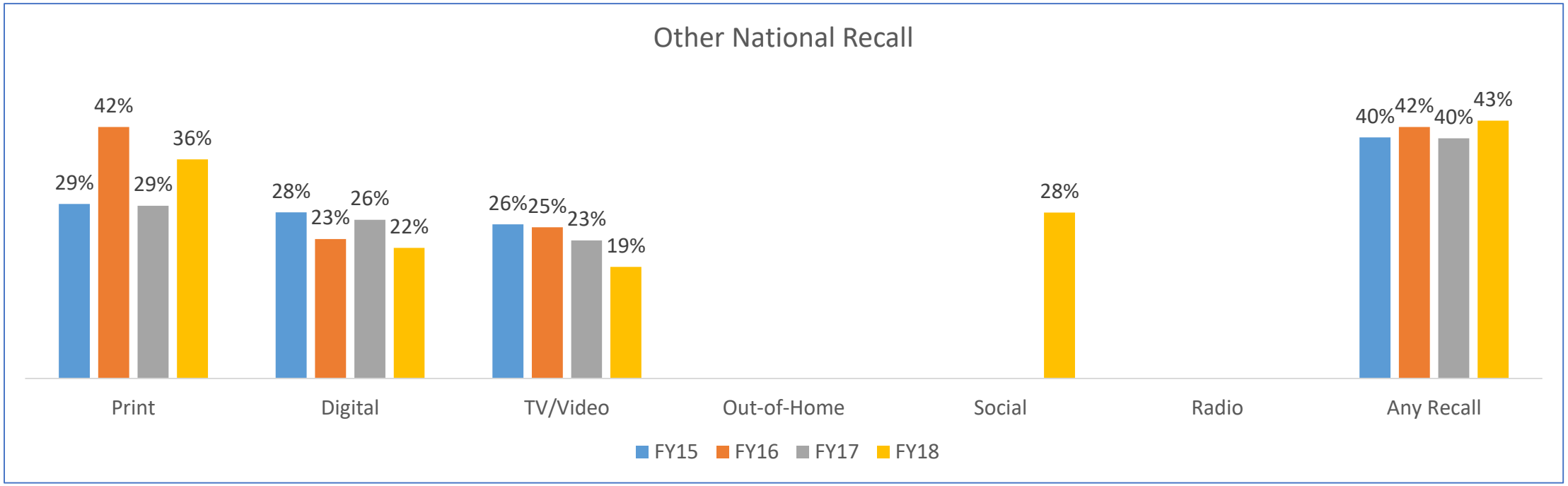
Minneapolis Recall



- Print receives the most investment and consistently garners the highest recall. There is limited investment in Minneapolis, but recall is similar to other spot markets.

Minneapolis	FY16	FY18
HHs	1,523,803	1,528,080
Awareness	44%	49%
Aware HHs	674,827	744,902
Media Spending	$368,241	$89,635
Cost per Aware HH	$0.55	$0.12

Other National Recall



- Recall in other parts of the U.S. increased with gains in print and significant social awareness. The inclusion of paid social media is important to the increases in overall recall.

Other National	FY15	FY16	FY17	FY18*
HHs	84,457,277	92,401,274	93,741,199	85,767,818
Awareness	40%	42%	40%	43%
Aware HHs	33,901,171	38,684,264	37,861,764	36,810,222
Media Spending	$3,685,075	$1,412,589	$2,042,700	$2,110,559
Cost per Aware HH	$0.11	$0.04	$0.05	$0.06

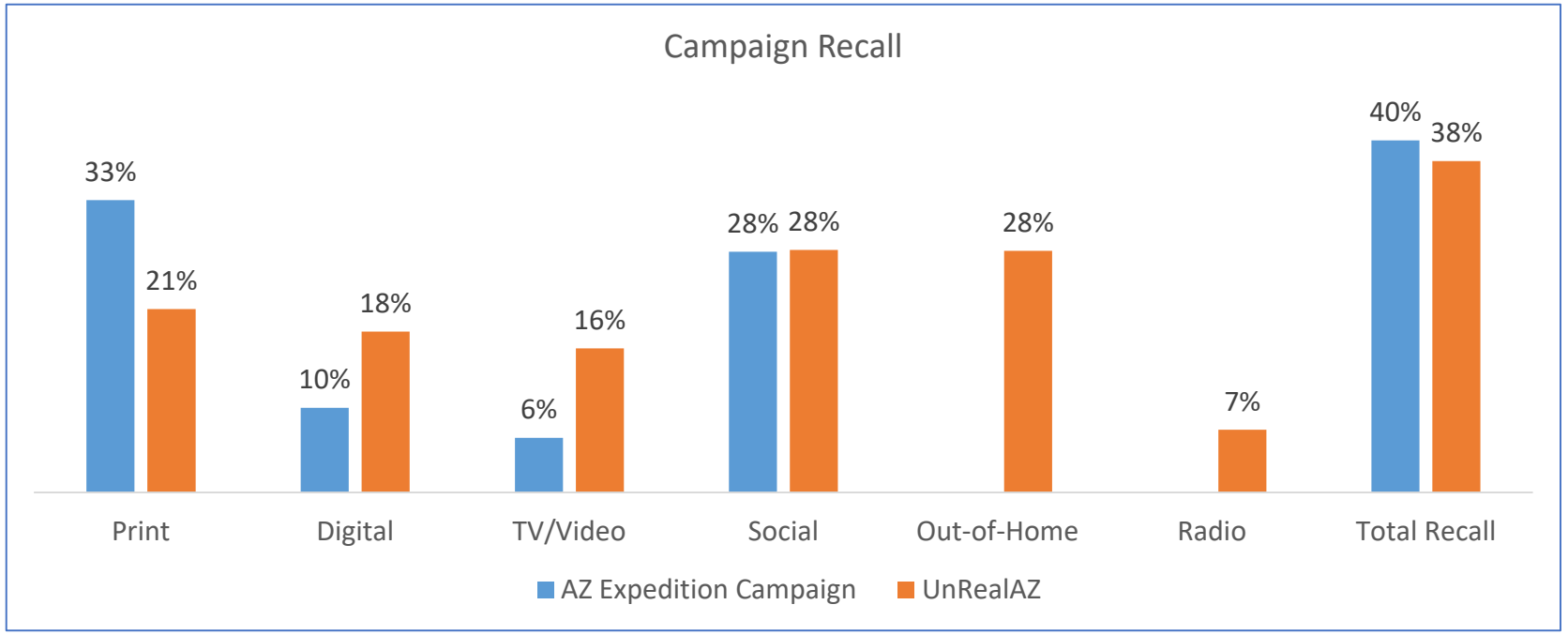
*Excludes New York City

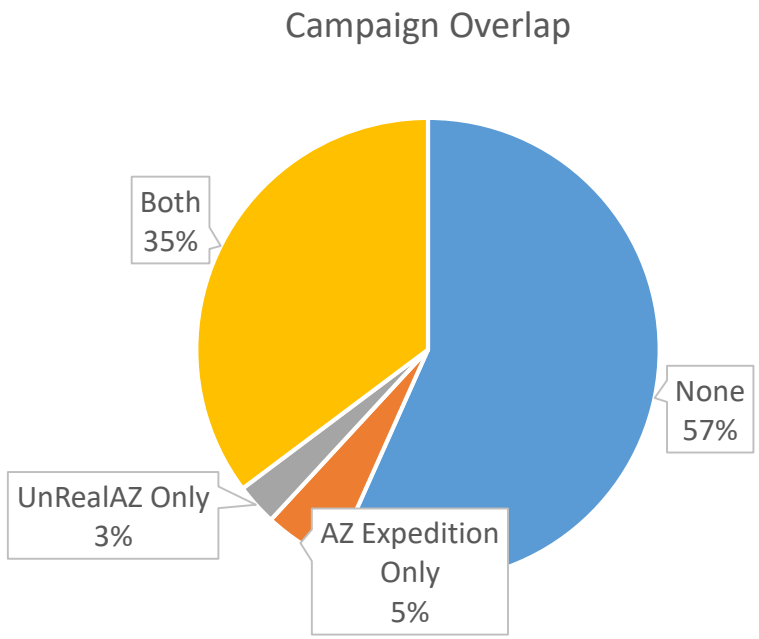
FY18 Cost per Aware Household by Medium

	Print	Digital	TV/Video	Out-of-Home	Social	Radio
HHs	100,597,786	100,597,786	100,597,786	8,384,667	100,597,786	8,384,667
Awareness	36%	22%	19%	28%	28%	7%
Aware HHs	36,510,785	21,741,669	18,677,970	2,345,508	27,710,006	588,713
Media Spending	$728,475	$897,072	$410,410	$531,263	$335,950	$75,000
FY18 Cost per Aware HH	**$0.02**	**$0.04**	**$0.02**	**$0.23**	**$0.01**	**$0.13**
FY17 Cost per Aware HH	$0.02	$0.05	$0.02	$0.34	NA	NA

- SMARInsights has found that different forms of media play different roles for DMOs, with print and TV/video being strong at building a destination's brand, while digital, out-of-home, social, and radio are good at delivering tactical messages.
- The efficiency of the media is tied to the number of households the campaign is attempting to reach. Those media with national reach are very efficient with a miniscule cost per aware household. Out-of-home and radio only reach spot households, resulting in the slightly higher cost per aware household.

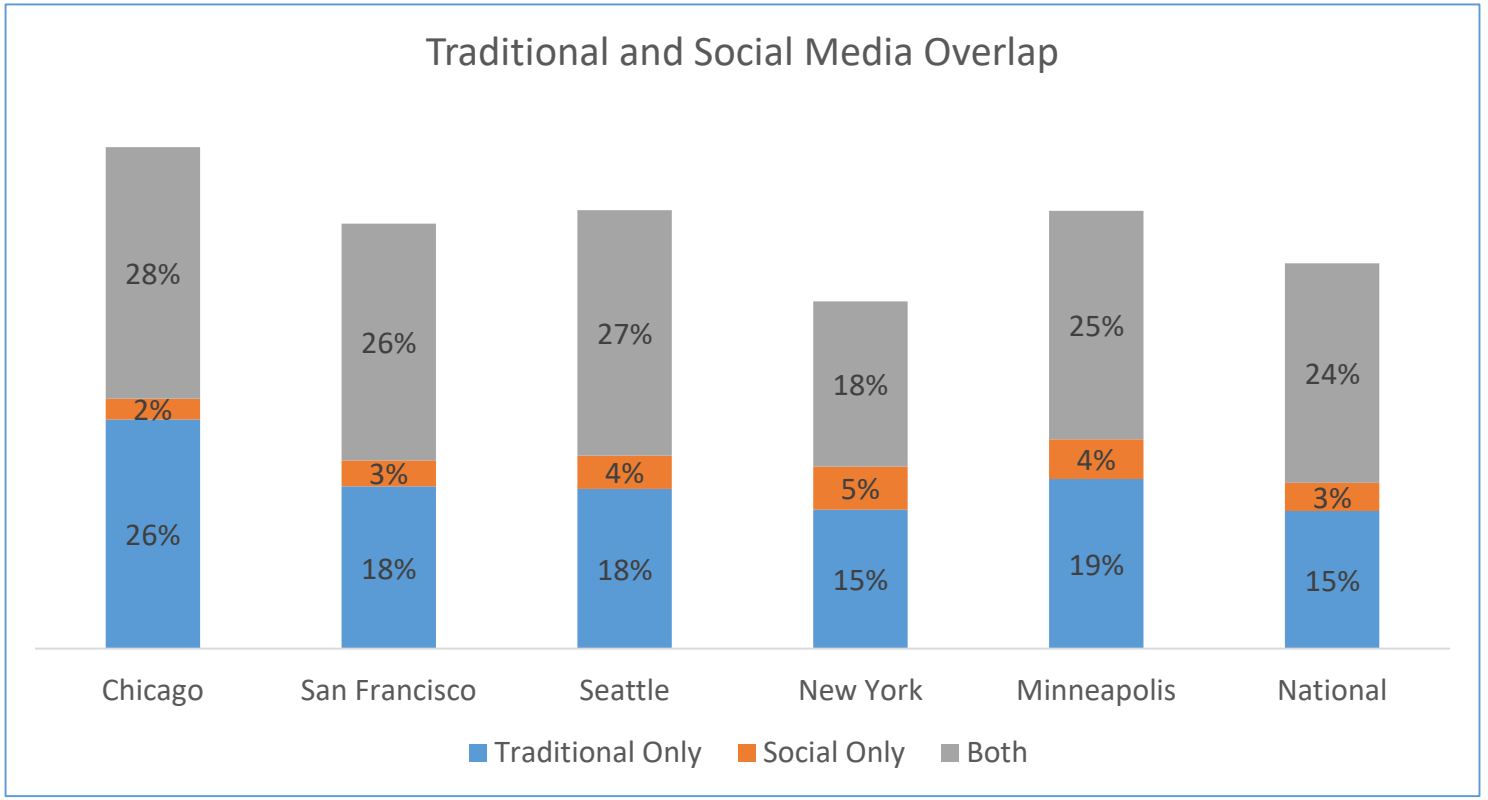
Campaign Recall





- Components of the previous AZ Expedition campaign were placed in FY18 in addition to the introduction of the UnRealAZ campaign. Print recall is highest overall for FY18 but is being driven by awareness of AZ Expedition print rather than UnRealAZ.
- Of those with recall, most are aware of both campaigns.

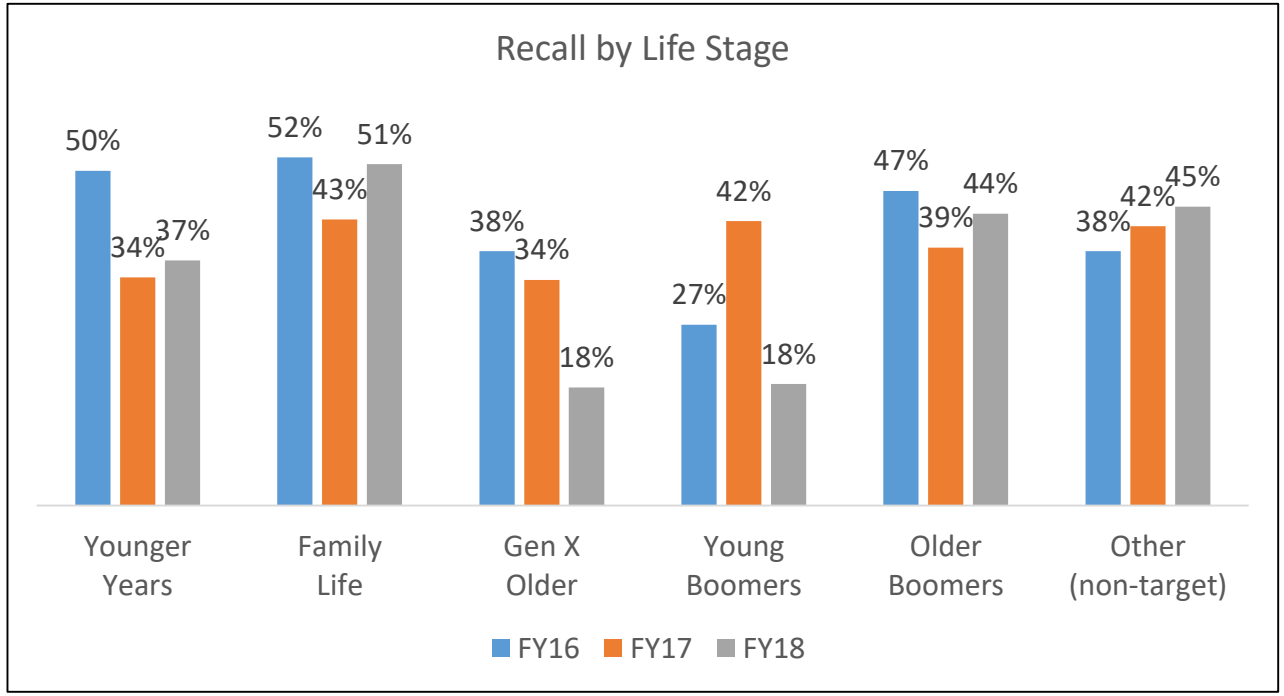
Media Overlap



- While the increases in print and out-of-home pushed overall awareness higher, the inclusion of paid social also contributed to the increase in recall and reach. If not for paid social, awareness in other parts of the U.S. outside of the spot markets would have been lower than in FY17.

Campaign Awareness by Life Stage

- AOT specifically targets five life stage groups, as defined in the table. These five groups account for only about a third of all leisure travelers due to the relatively high income requirements.
- As recall increased overall, three of the five targeted life stages had increases in awareness. The most significant increase in recall was among the Family Life audience.
- Older Gen Xers and Young Boomers had significant declines in recall.



Life Stage Group	Definition
Younger Years	under 45, no children at home, $75K+ income
Family Life	under 52, children at home, $100K+ income
Gen X Older	46-51, no children at home, $75K+ income
Young Boomers	52-59, children at home, $100K+ income
Older Boomers	60-69, no children at home, $100K+ income
Other	all others

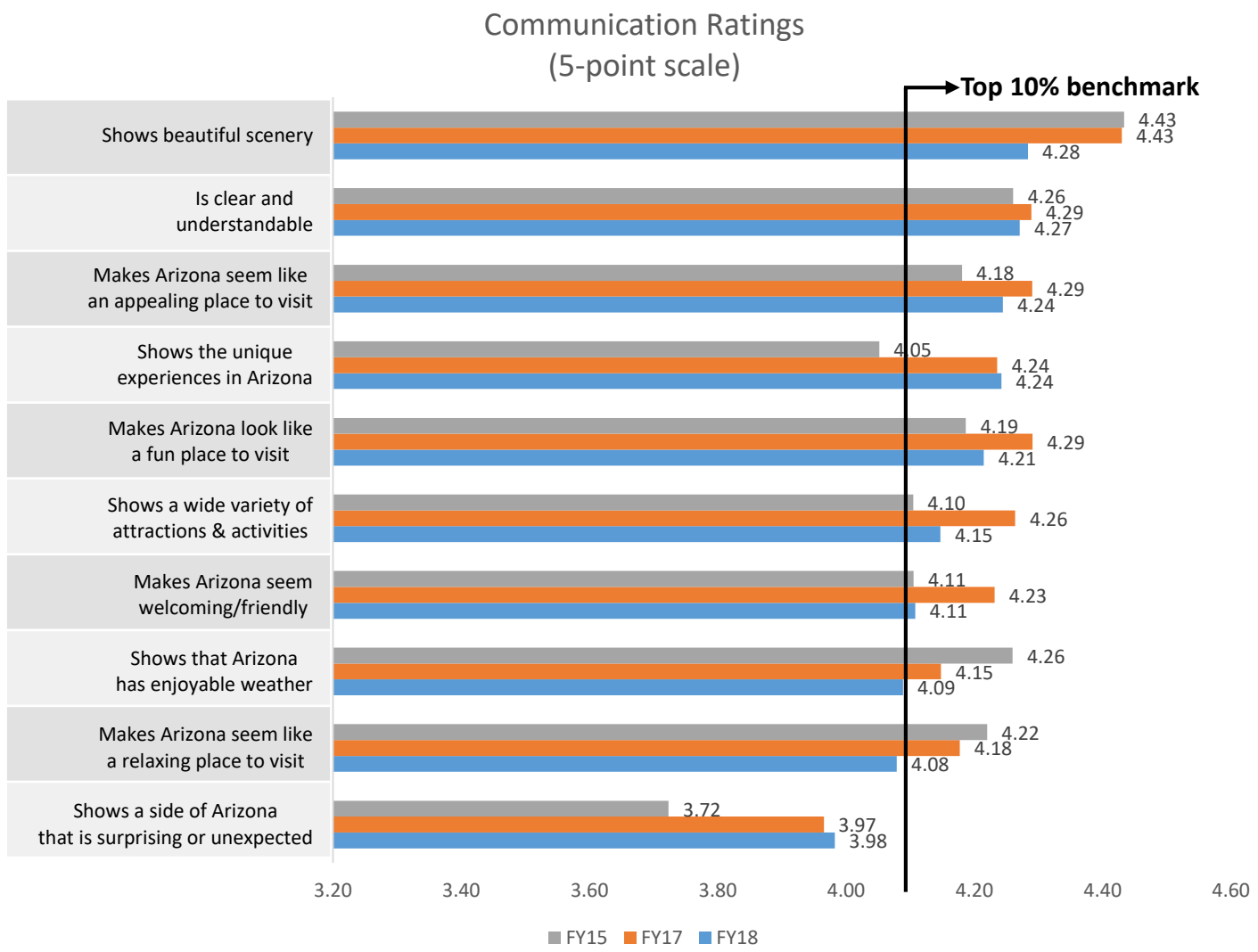
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Creative Ratings

In order to be effective (to influence Arizona travel), the ads must not only reach the target audience, but they must also clearly communicate intended messages and generate interest in Arizona travel. SMARInsights has developed a set of creative benchmark ratings based on the evaluation of hundreds of DMO campaigns. There are goal ratings that campaigns should attempt to reach. These ratings vary depending on what they are attempting to do – communicate a message or spur a consumer to action.

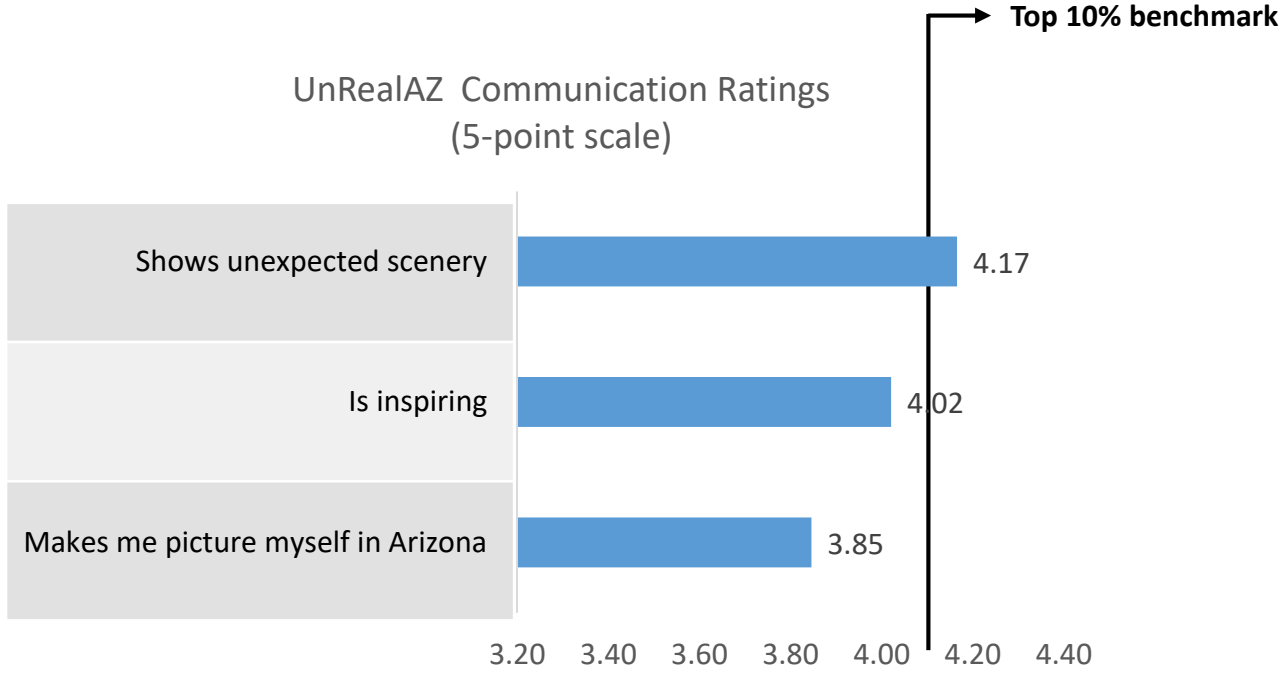
Creative *Communication* Ratings Change

- Arizona has consistently produced creative that received ratings in the top 10% of all DMOs. And although the creative ratings dipped slightly from the AZ Expedition campaign, the ratings continue to be some of the best in the industry. Because FY18 media placements included both AZExpedition and UnRealAZ creative, there isn't a clear measure on just the new creative.
- Much of the investment in the UnRealAZ campaign is allocated to print. The FY18 campaign moves away from a single image as employed in recent campaigns and toward usage of multiple images and text. SMARInsights finds that majestic product, which is often shown as a stand-alone image, garners higher ratings. However, consumers are looking for more context and tend to respond better to multi-image creative.



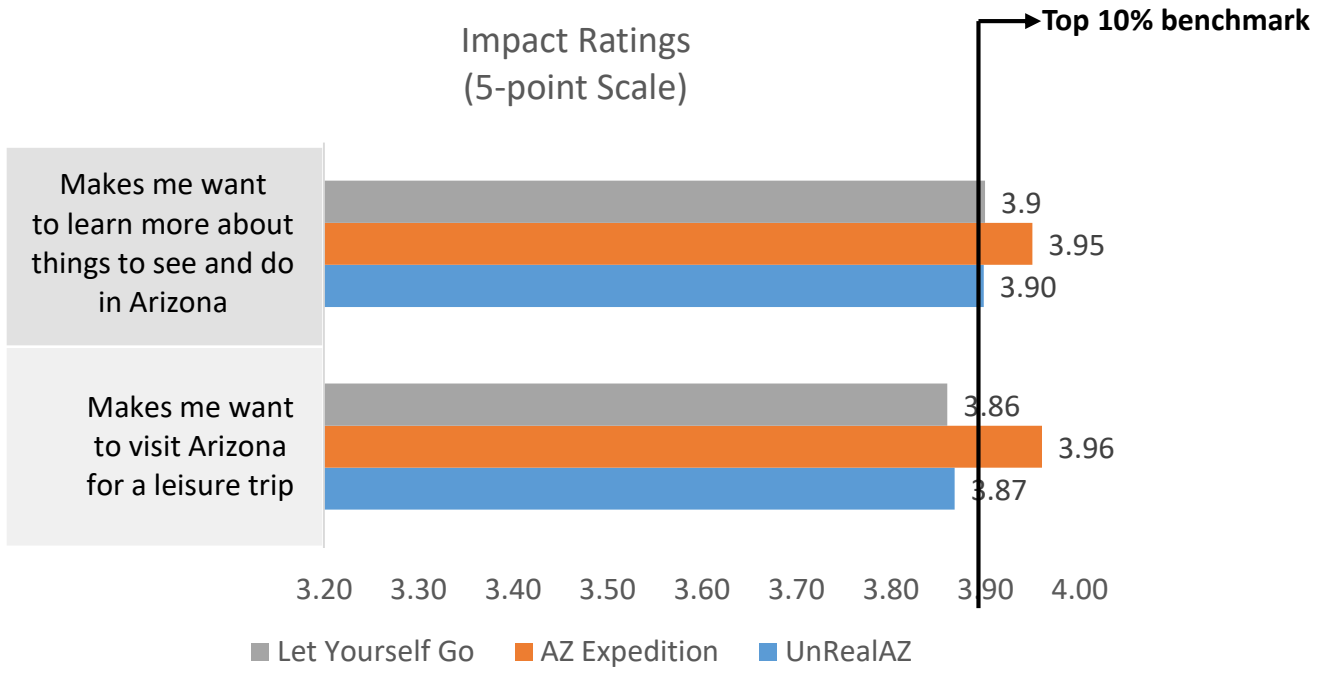
UnRealAZ *Communication* Ratings

- In addition to communication attributes on which prior campaigns have been measured, the UnRealAZ campaign has additional messages it was attempting to communicate.
- For showing unexpected scenery, the campaign continues to score in the top 10%, but for being inspiring and making consumers picture themselves in Arizona, the creative falls short of the benchmark.



Creative *Impact* Ratings Change

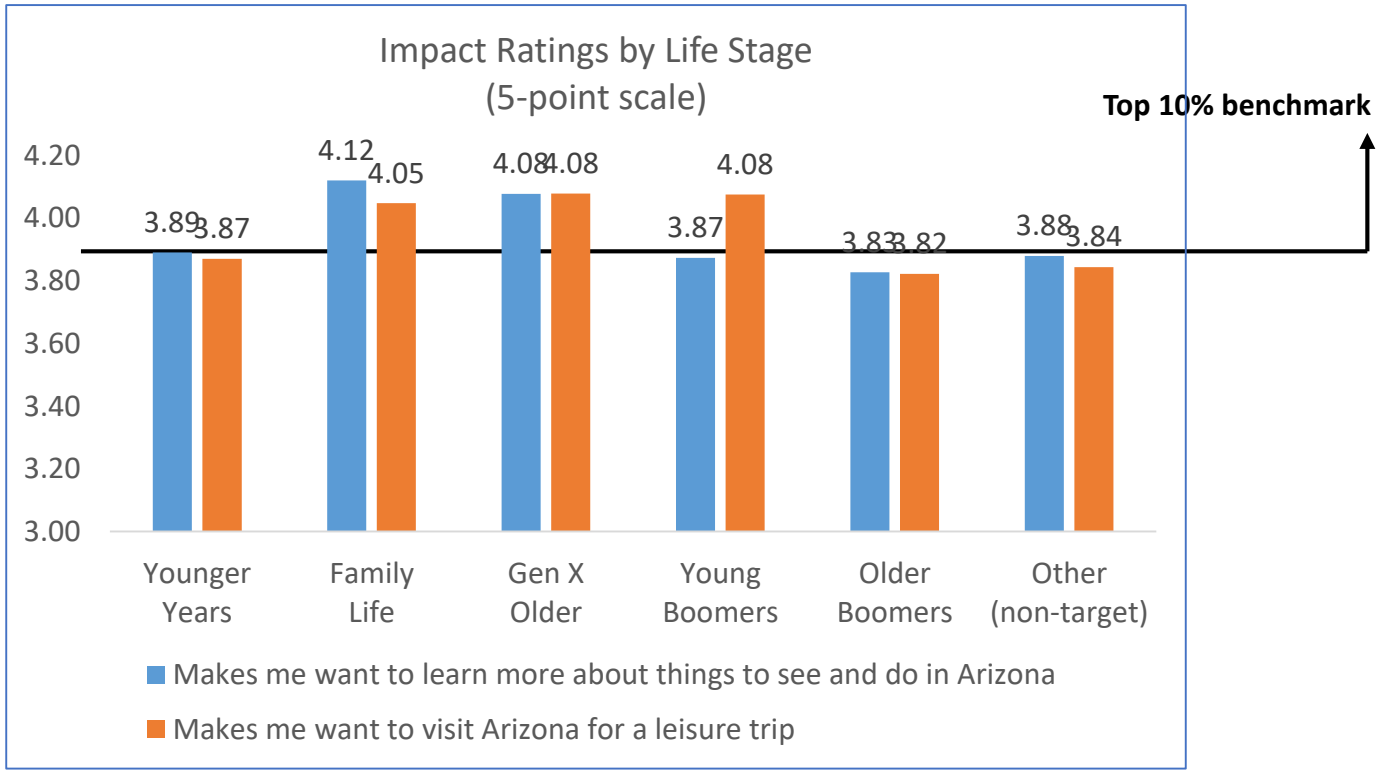
- Impact ratings have slightly different benchmarks as they require an action from the consumer, which is far more difficult than just communicating a desired message. While there was a slight decline in the ratings, the ads continue to score in the top 10% for making consumers want to learn more but fall just short for making consumers want to visit.



Creative *Impact* Ratings by Life Stage

Life Stage Group	Definition
Younger Years	under 45, no children at home, $75K+ income
Family Life	under 52, children at home, $100K+ income
Gen X Older	46-51, no children at home, $75K+ income
Young Boomers	52-59, children at home, $100K+ income
Older Boomers	60-69, no children at home, $100K+ income
Other	all others

- Among the life stages, the ads have the most appeal for Gen-Xers and Young Boomers, the audience that had the least recall of the paid media.



Creative *Communication* Ratings by Market

- With a number of years of targeted media in the Chicago market, these consumers respond most favorably to the UnRealAZ campaign.
- As with the AZ Expedition campaign in FY17, consumers in San Francisco are the least positive about the creative. Just as it's possible overall appeal of Arizona as a leisure destination is tied to the climate of the targeted market, how the creative is received could also be tied to winter temperatures, with San Francisco having the most mild winters of the markets targeted.
- When evaluating New York City as a potential market, they respond similarity to the national audience.

Top 10% Benchmark Rating
Top 25% Benchmark Rating
Below Top 25% Benchmark Rating

	Chicago	San Francisco	Seattle	Minneapolis	New York	National
Makes Arizona seem like an appealing place to visit	4.36	4.17	4.27	4.30	4.18	4.25
Shows that Arizona has enjoyable weather	4.22	3.97	4.12	4.19	4.07	4.09
Makes Arizona seem like a relaxing place to visit	4.21	3.96	4.06	4.09	4.07	4.08
Shows a wide variety of attractions & activities	4.16	4.01	4.09	4.13	4.09	4.16
Shows a side of Arizona that is surprising or unexpected	4.00	3.88	3.93	3.96	3.89	3.99
Shows diverse scenery	4.24	4.16	4.22	4.22	4.19	4.30
Makes Arizona look like a fun place to visit	4.28	4.08	4.19	4.25	4.14	4.22
Makes Arizona seem welcoming/friendly	4.19	3.97	4.07	4.11	4.13	4.11
Shows the unique experiences in Arizona	4.30	4.13	4.21	4.23	4.16	4.25
Is clear and understandable	4.35	4.21	4.26	4.27	4.21	4.27
Is Inspiring	4.10	3.94	3.99	3.99	3.94	4.03
Shows unexpected scenery	4.18	4.08	4.15	4.08	4.06	4.18
Makes me picture myself in Arizona	3.97	3.70	3.82	3.86	3.80	3.85

Creative *Impact* Ratings by Market

Top 10% Benchmark Rating
Top 25% Benchmark Rating
Below Top 25% Benchmark Rating

- Chicago and Minneapolis are the most positive about UnRealAZ creative of in terms of its ability to motivate interest. But again, in other target markets and other parts of the U.S., the creative continues to garner impact ratings in the top 25% of all DMO creative SMARInsights' measures.

	Chicago	San Francisco	Seattle	Minneapolis	New York	National
Makes me want to learn more about things to see and do in Arizona	4.01	3.82	3.85	3.94	3.84	3.90
Makes me want to visit Arizona for a leisure trip	4.03	3.82	3.88	3.99	3.82	3.86

Drivers to Visitation

- SMARInsights has developed a driver analysis method that goes beyond simply correlating the image attributes with likelihood to visit. This information is important to keep in mind and use in evaluating the impact of the advertising.
  - ***Opportunities to improve***: These are the attributes that are strongly correlated with interest in visiting, but rate relatively low compared to other Arizona perceptions. ***Improving Arizona's image for these attributes will generate interest in visiting the area.***
  - ***Existing strengths to promote***: These attributes are strongly correlated with visitation and are rated above average relative to other attributes. ***These are the area's core strength and should feature heavily in marketing.***
  - ***Existing strengths to maintain***: These attributes receive above-average ratings but are not as strongly correlated with visitation.
  - ***Indifferences to ignore***: These attributes are neither strong drivers nor Arizona's current strengths.



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Advertising Impact & ROI

The following section reviews the actual impact of the FY18 AOT advertising by comparing the perceptions and travel behaviors of those not aware of the ads to the perceptions and behaviors of those aware of the ads. The difference, or "increment," is considered attributable to the advertising.

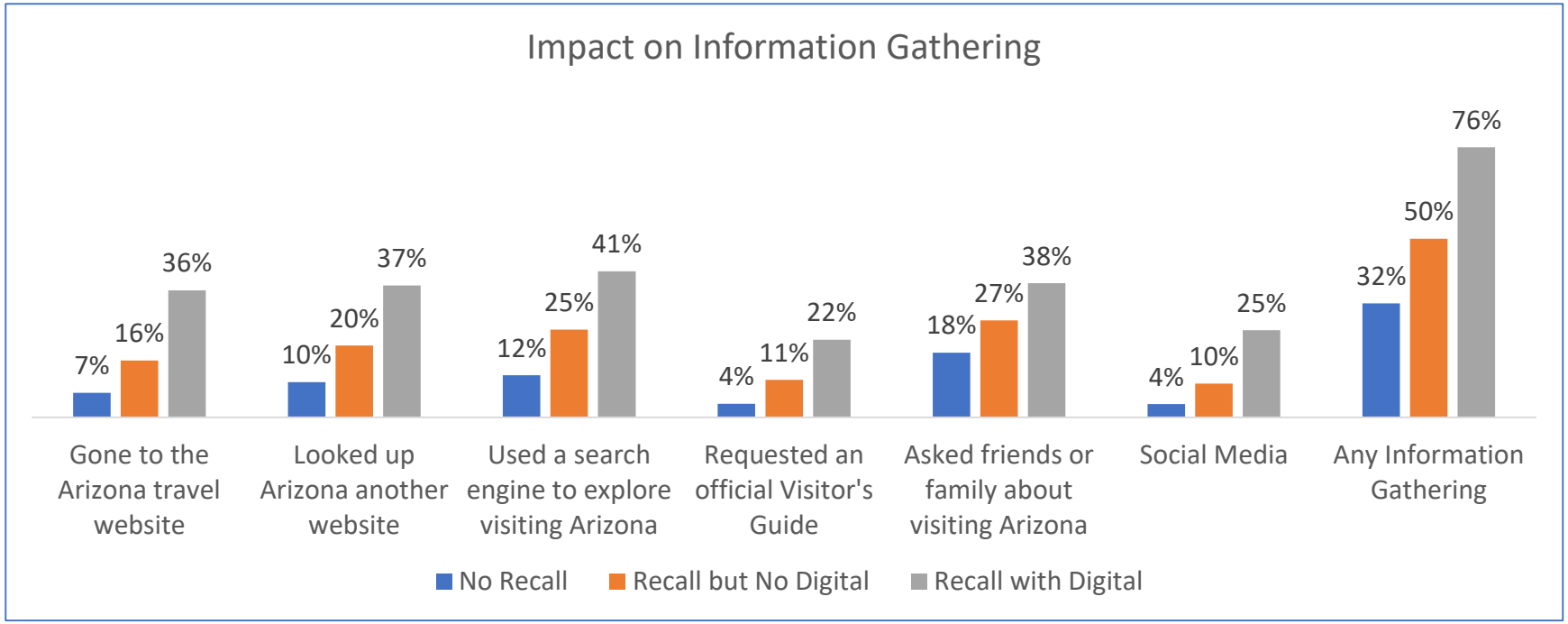
Ad Impact on Arizona Leisure Travel Image

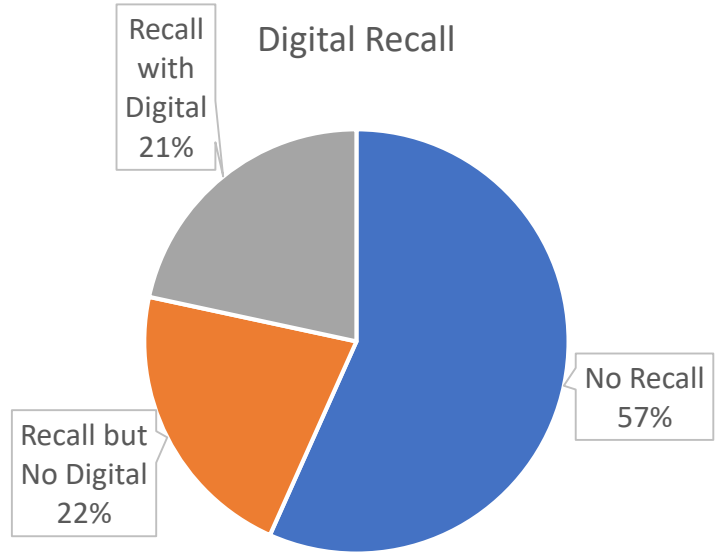
- An important step in turning a targeted household into a visitor is to build the image of the destination. The UnRealAZ campaign was able to improve the image of Arizona for consumers who saw the advertising.
- However, it is relevant where the advertising had the most impact. The attributes highlighted to the right are those that were considered Opportunities to Improve in the driver analysis. These are the attributes that are considered motivators to driving interest in Arizona but for which the image of the area could be improved.

Mean rating on 5-point scale

	No Recall	Recall	Difference
Offers something for the whole family	3.68	4.00	0.33
Has warm, friendly and welcoming people	3.51	3.80	0.29
Has diverse scenery	3.69	3.97	0.28
Is a fun place to visit	3.64	3.92	0.28
Is a good place to go for a relaxing vacation	3.66	3.93	0.28
Has enjoyable weather throughout the year	3.40	3.68	0.27
Is a good place to go to relax by the pool	3.66	3.93	0.27
Has unique local shopping options	3.40	3.67	0.27
Is a good value for the money	3.43	3.70	0.26
Great for outdoor adventure, like hiking/backpacking, biking, and water sports	3.88	4.14	0.26
Great for visiting state/national/tribal parks	3.93	4.18	0.26
Great vacation for couples	3.56	3.81	0.25
Offers lots of water sports activities, like boating, river rafting and kayaking	3.29	3.51	0.22
Offers authentic culinary experiences	3.42	3.63	0.22
Is a good place to enjoy the urban experience	3.13	3.34	0.21
Great for experiencing the culture of the Old West	3.75	3.94	0.19
Great for American Indian experience	3.79	3.97	0.18
Offers local/one-of-a-kind dining options	3.34	3.51	0.18
Has first-class resorts & hotels	3.68	3.85	0.17
Has unique spas or spa treatments	3.41	3.56	0.15
Great for attending a professional or college sporting event	3.34	3.48	0.14
Great for Hispanic culture	3.41	3.55	0.14
Is easy to fly to	3.83	3.96	0.13
Great for golfing	3.56	3.69	0.13

Impact on Information Gathering

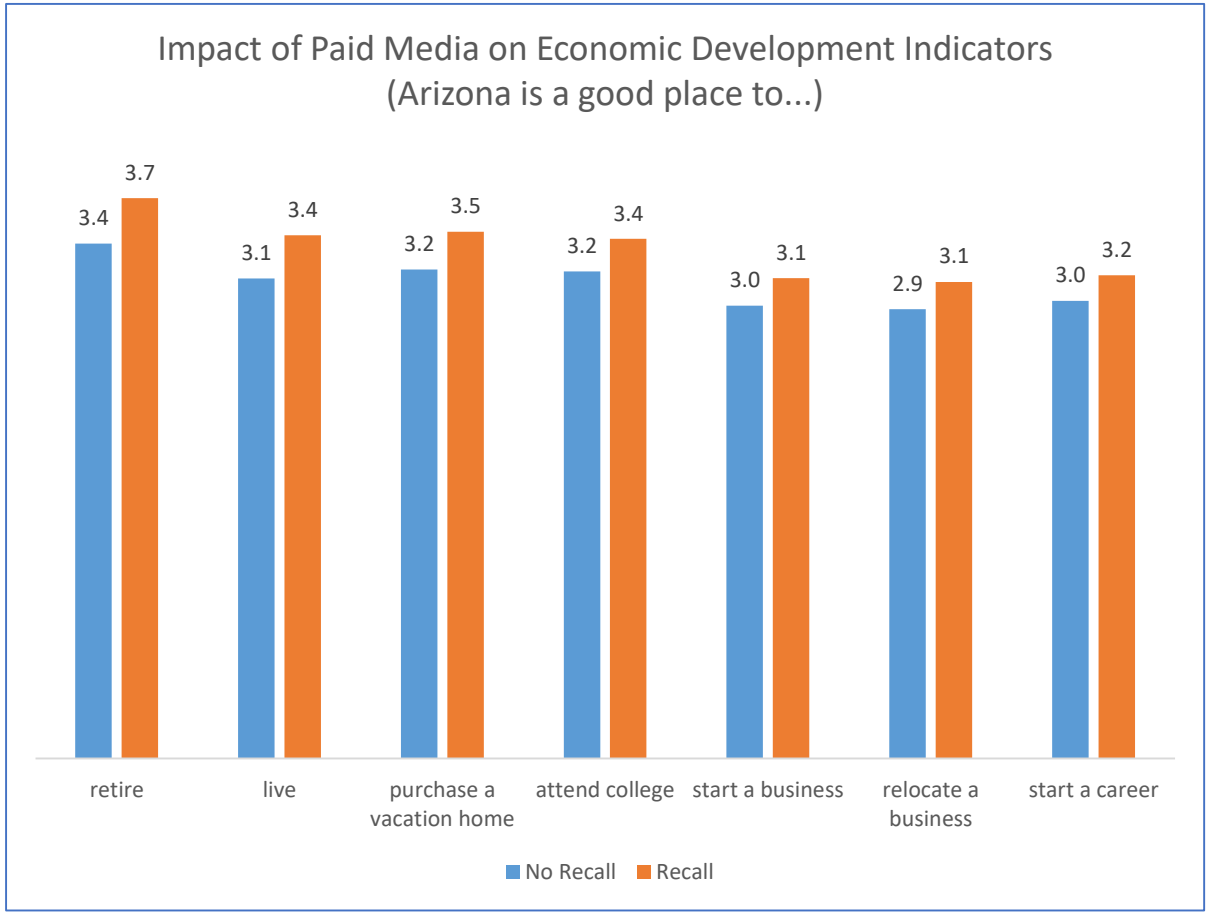




- In addition to building the image of the destination, DMO marketing can spur consumers to gather information. Given DMOs are shifting more resources into retargeting, this can be a bit deceiving. The extreme differences in information gathering could be a result of a digital ad being delivered after visiting the state's website or Facebook page. This is likely the case given the drop in information gathering by those with recall of other media besides digital.
- Either way, those with exposure were still more engaged with Arizona's owned media sources such as the website, social channels, and print collateral.

Ad Impact on Economic Development

- While the AOT leisure travel advertising is not necessarily designed to build perceptions of Arizona as a place to live and work, the advertising can have a “halo” impact, meaning that improving the perception of the state as a place to visit will improve its image in other areas, such as those related to economic development.
- The chart here shows that the FY18 AOT campaign does have this halo impact on all of the economic development attributes.

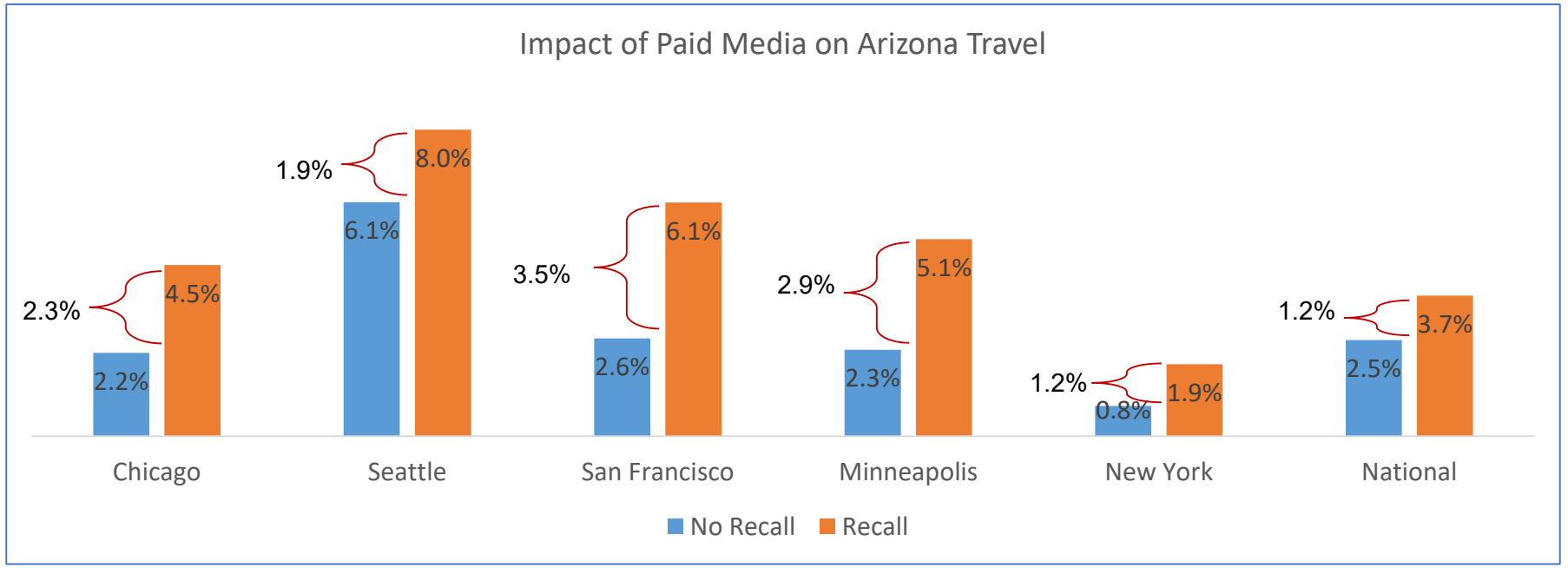


Measuring Influence

- While information gathering and online activity are good indicators of the performance of the campaign, the effectiveness of the advertising is ultimately measured by the number of trips that the campaign is able to generate.
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to Arizona even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the area would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced. As such, this is a very conservative measure of influence.

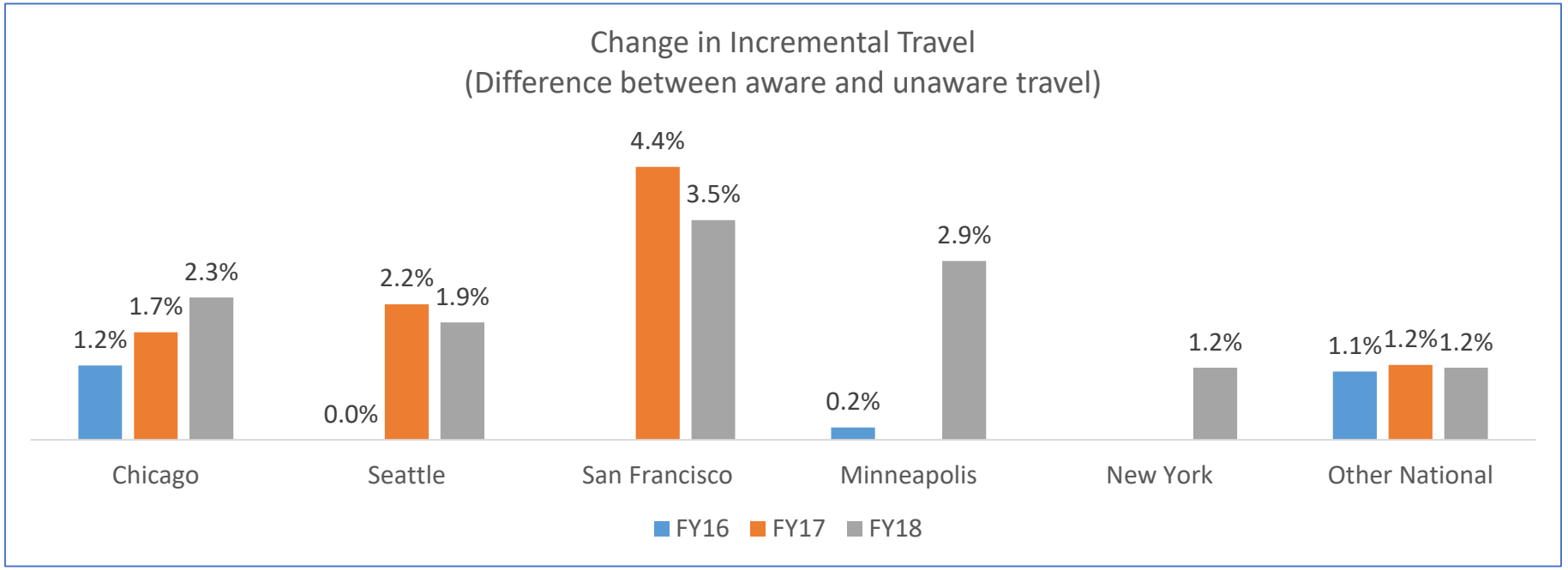


Incremental Travel



- The paid media was able to influence additional visitation in all the targeted spot markets and across other parts of the U.S. The travel increment was highest in San Francisco, followed by Minneapolis and Chicago.
- While the travel increment in New York City and other parts of the U.S. is small, it is applied across a large population, influencing a significant number of trips.

Ad Impact on Arizona Travel



- San Francisco has returned the highest increment for the past two years. As seen previously, this is the market that is the least positive about Arizona. With this, exposure to the paid media has the most influence.
- Targeted investment in New York City could generate additional increment. However, it is an expensive market to pursue and is able to generate modest recall and incremental travel as part of a national media buy.

FY18 ROI by Market

	Chicago	Seattle	San Francisco	Minneapolis	New York	National
Aware HHs	1,716,737	1,035,728	778,142	744,902	2,490,937	36,810,222
Incremental travel %	2.3%	1.9%	3.5%	2.9%	1.2%	1.2%
Incremental traveling HHs	39,372	19,608	27,568	21,473	28,905	427,146
Average trip spending	$1,938	$1,584	$1,558	$1,693	$1,714	$1,756
Ad-influenced travel revenue	76,318,288	31,053,983	42,946,828	36,350,683	49,533,296	750,074,992
Media spending	$303,360	$199,260	$275,354	$89,635		$2,110,559
ROI	$252	$156	$156	$406	NA	$355
State taxes generated	$3,205,368	$1,304,267	$1,803,767	$1,526,729	$2,080,398	$31,503,150
State tax ROI	$10.57	$6.55	$6.55	$17.03	NA	$14.93
Local taxes generated	$2,747,458	$1,117,943	$1,546,086	$1,308,625	$1,783,199	$27,002,700
Local tax ROI	$9.06	$5.61	$5.61	$14.60	NA	$12.79
Total taxes generated	$5,952,827	$2,422,211	$3,349,853	$2,835,353	$3,863,597	$58,505,850
Total tax ROI	$19.62	$12.16	$12.17	$31.63	NA	$27.72

- Given the population, the advertising generated the highest ROI in the other national markets. Of the targeted spot markets, influenced visitor spending is highest in Chicago. But with limited investment, the campaign was able to generate strong recall and incremental travel in Minneapolis, generating the highest return on investment of the spot markets.

ROI

	FY15	FY16	FY17	FY18
HHs	89,012,056	100,234,179	100,597,786	100,597,786
Awareness	40%	42%	41%	43%
Aware HHs	36,040,228	42,226,636	40,842,444	43,576,669
Incremental travel %	2.1%	1.1%	1.2%	1.3%
Incremental traveling HHs	758,252	453,391	493,624	564,073
Average trip spending	$1,638	$1,689	$1,680	$1,748
Ad-influenced travel revenue	$1,241,702,827	$765,921,644	$829,361,043	$986,278,070
Media spending	$4,684,632	$2,778,109	$3,242,439	$2,978,168
ROI	**$265**	**$276**	**$256**	**$331**
State taxes generated	$52,151,519	$32,168,709	$34,833,164	$41,423,679
State tax ROI	**$11.13**	**$11.58**	**$10.74**	**$13.91**
Local taxes generated	$44,701,302	$27,573,179	$29,856,998	$35,506,011
Local tax ROI	**$9.54**	**$9.93**	**$9.21**	**$11.92**
Total taxes generated	$96,852,820	$59,741,888	$64,690,161	$76,929,690
Total tax ROI	**$20.67**	**$21.50**	**$19.95**	**$25.83**

- Overall, the FY18 advertising campaign influenced more than 564,000 trips and generated about $986 million in travel revenue.
- The campaign returned $331 in visitor spending for each $1 invested.
- In terms of taxes, the FY18 campaign returned $25.83 in state and local tax revenue for each $1 invested.
- The FY15 campaign generated more influenced revenue, but there was significantly more invested in paid media. With that, the FY18 campaign has the highest ROI in recent years.



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Learn more about Meetings Mean Business and how to get involved: meetingsmeanbusiness.com

MEETINGS MEAN BUSINESS

MESSAGE FROM MEETINGS MEAN BUSINESS

Meetings Mean Business (MMB) is an industry-wide coalition that showcases the undeniable value that business meetings, trade shows, incentive travel, exhibitions, conferences and conventions bring to people, businesses and communities.

Although the services provided by our industry often go unnoticed, they are a catalyst for economic growth. They have the power to influence how a city takes shape, including who lives there, who works there and who visits year-to-year. What's more, they can determine what other industries flock to the region and whether long-term investment opportunities will succeed or fail.

Take Las Vegas, Austin, New York or Chicago. In these destinations and countless others, it is clear that the contributions our industry makes cannot be defined solely by what happens in a hotel ballroom or convention center.

As this report bears out, meetings and events help drive travel and tourism into communities and are often the lifeblood of visitor spending, jobs and revenue. It is no surprise then that destination marketing organizations (DMOs) are using meetings to impact the communities around them, though the strategies and tactics they have relied on are nothing short of remarkable.

We hope you enjoy reading this report and welcome your feedback.



Paul Van Deventer,
MMBC co-chair and president and chief executive officer of Meeting Professionals International



Richard Harper,
MMBC co-chair and executive vice president of HelmsBriscoe

ABOUT MEETINGS MEAN BUSINESS

Meetings Mean Business is an industry-wide coalition to showcase the undeniable value that business meetings, trade shows, incentive travel, exhibitions, conferences and conventions bring to people, businesses and communities. By rallying industry advocates, working with stakeholders, conducting original research, engaging with outside voices and more, the coalition brings the industry together to emphasize its importance. Comprised of over 60 members, the coalition unites the meetings industry with one strong and powerful voice.



TABLE OF CONTENTS

Executive Summary 6

1. Introduction: The Rise of The Convergence Economy 8
1.1 The Global War For High Value Jobs 10
1.2 Positioning Destination Marketing as Economic Development 12
1.3 Q&A With Philadelphia Mayor Jim Kenney 14
1.4 The Cost of Lost Convention Business Due to Contentious Legislation 15
1.5 The Top 25 U.S. Cities Prepared For The Digital Economy 16

2. How The Meetings and Conventions Industry is Undervaluing Itself 18
2.1 Lack of U.S. Research Is Hampering Understanding of Legacy Impacts 21
2.2 Business Events Sydney: Looking Beyond The Delegate Spend 23

3. Defining And Prioritizing The Legacy Impacts Of Conventions 26

4. Case Study: Washington, DC Leverages Conventions to Develop its 'Inclusive Innovation' Sector 30

5. Case Studies: Convention Bureaus And Economic Development Agencies Are Positioning Cities As Knowledge Collision Spaces 33
5.1 Cleveland's Health Tech Corridor Connects The City's Medical Leaders With The World's Business Leaders 35
5.2 Las Vegas Tech and Medical Meetings Support The Development of New Innovation Hubs 38
5.3 The San Diego Tourism Authority is Building the Destination's Business Brand Around its Tech Sector 42
5.4 San Francisco Travel and Mayor's Office Of Economic Development Drive City's Long-Term Growth Vision 45
5.5 Explore St. Louis and the Cortex Innovation Community Are Pivoting the City's Business Brand Image 48
5.6 Albuquerque's New Innovation District is Designed to Commercialize Ideas 51

6. Global CVBs and Associations Are Co-creating Their Legacy Impacts 54
6.1 How Associations Are Developing Their Legacy Impacts 56
6.2 Melbourne Convention Bureau: The Poster Child for Conventions in The Convergence Economy 59
6.3 The Role of Universities In Evaluating the Legacy Impact of Conventions 62

Eight Key Takeaways To Better Leverage Conventions to Drive Economic Development 65

Further Reading 67

ABOUT SKIFT

Skift is the largest industry intelligence platform, providing Media, Insights & Marketing to key sectors of travel. SkiftX is Skift's in-house content marketing studio, working collaboratively with partners on integrated projects including webinars, video, research, and live events.

Visit skiftx.com, or email skiftx@skift.com.

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EXECUTIVE SUMMARY

The meetings and conventions industry is evolving into a global innovation distribution channel. Over the last decade, convention bureaus have been collaborating more strategically with their local and state governments, economic development agencies, academic and scientific institutions, and local business improvement districts to better leverage the value of conventions in their cities, especially those aligned with their regions' high-priority growth sectors.

The collective goal among those private and public organizations is to attract more conventions in advanced and creative industries to help position their cities as economic and innovation accelerators, in an effort to attract outside corporate investment and talent more effectively in those industries.

In the U.S. today, all state and local governments are competing to expand their innovation economies and drive high-quality job growth. Because science and technology are evolving at such a fast pace, cities have to expand their talent pools of professionals working in the STEM and creative industries more rapidly to remain competitive. Examples of those priority sectors include aerospace in Jacksonville, cleantech in Portland, bio-med in Denver, life sciences in San Diego, healthcare IT in Cleveland, cognitive media in Boston, and eSports in Washington, D.C.

Conventions driving innovation in those demand sectors deliver companies and associations to a city's doorstep. Therefore, convention bureaus, governments, economic development professionals, academics, and researchers have face-to-face access with industry leaders to develop new business relationships, investments, research, and priority sector innovations.

Conventions, of course, have always provided a platform for the exchange of new ideas to drive progress. Today, however, city leaders want to commercialize those ideas much more intentionally, aggressively, and systematically for the benefit of their local communities.

In today's digital platform economy, every public and private stakeholder in the meetings and conventions industry is a node on the global innovation distribution superhighway. Therefore, industry members should be positioned as such — as brokers of innovation. Innovation is the primary currency of most conventions today, with the ability to provide greater economic benefits to a wider breadth of people when city leaders and convention stakeholders focus on long-term economic gains to develop event strategy.

The challenge is mapping and measuring those long-term impacts. Presently, most cities highlight the economic benefits of conventions based on the short-term hospitality and tourism spend during conventions, which are then extrapolated to show the overall impact on jobs and taxes in the region on an annual basis. However, in addition to that, there are many important long-term economic benefits, or "legacy impacts," that conventions deliver to a city that are typically not included in traditional impact reports.

For just a few examples of those legacy impacts, conventions in priority industries help:

1. Implement local and state government initiatives to drive development of industry sector clusters
2. Improve destination brand lift to position a city as a hub of innovation in specific industry sectors
3. Provide a marketing showcase to promote the region's advanced industry, creative, and academic expertise to companies worldwide
4. Encourage corporate expansion, relocation, and/or investment into a region to grow the volume of high-value jobs and increase the local tax base
5. Provide a platform for developing new academic, technological, and scientific research and knowledge sharing to strengthen a region's innovation economy and commercialize new ideas
6. Motivate convention delegates to return as leisure visitors or part- or full-time residents

If, then, U.S. convention bureaus are lacking the necessary research to empirically evaluate the long-term economic impacts of conventions in their priority growth sectors, they're not showing their full impact on their cities' innovation sectors and overall economic output. That hampers bureaus from fully validating and securing the necessary public funding to deliver on their mandates, because the data doesn't exist to support a convention bureau's efforts beyond its impacts on its region's visitor economy

Therefore, the meetings industry needs a new road map that better encapsulates and evaluates the legacy benefits of meetings and conventions to grow a city's competitive advantage, in order to illustrate best practices and guide long-term strategy for a broader scope of regional stakeholders.

Such a road map outlining the potential benefits of stronger public-private collaboration over the long term exploits the breadth of resources — which already exist in a city's innovation ecosystem — that convention bureaus can leverage to engage convention organizers on a deeper level and deliver a more holistic destination experience for attendees.

The meetings industry is not completely bereft of science studying the long-term impacts of conventions on a region's economic growth. Most notably, the "Beyond Tourism Benefits" research series developed by Business Events Sydney and the University of Technology Sydney is considered the benchmark for insight on this subject. The thrust of the research shows that convention bureaus are an integral part of a destination's long-term economic development strategy when they're aligned with local and state government policy.

"Convention bureaus have typically come under the tourism remit," says UTS professor Deborah Edwards, one of the principal architects of Beyond Tourism Benefits. "But what our research shows is that convention bureaus really should come under the remit of the industry and trade ministries, which usually have more funding attached to them."

The purpose of this Skift research report, produced in collaboration with Meetings Mean Business, is to elevate the conversation around the importance of defining the legacy economic impacts of conventions, and explore how the public and private sectors in certain cities are collaborating to build on those impacts more effectively.

1. INTRODUCTION: THE RISE OF THE CONVERGENCE ECONOMY



CES 2017, Las Vegas

Skift Take

The rise of the convergence economy, where governments and innovative companies are collaborating across different industries more holistically, is producing more strategic alliances between cities' public and private sectors to create platforms for long-term economic development.

At their core, cities are horizontally-integrated platforms for many different types of economic value exchange and social interaction. Within the context of the global meetings and conventions industry, cities can be characterized as hardware and software. The hardware is the urban infrastructure: convention centers, hotel districts, restaurants, airports, and public transportation, etc. The software is the matrix of people visiting the city for conventions, combined with those living and working in the destination, each with their own individual economic value.

Positioning cities as hardware and software is key to understanding how the meetings and conventions industry helps drive long-term economic impact in the 21st century. Typically,

urban destinations have been competing for the attention of convention organizers primarily by promoting their hardware. The cities of the future, however, are leveraging their software — their knowledge industry professionals and their expertise in advanced industries — to gain competitive advantage and differentiate the region's value proposition.

Today, without exception, successful cities are giving rise to what the Brookings Institution calls the "Convergence Economy," connecting their public and private sectors across a wider variety of disparate enterprises, agencies, and institutions, to expand advanced industry ecosystems that drive innovation and power economic growth. Motivating that, all state and local governments have identified specific high-growth priority sectors that they want to strengthen, generally based on local industries where they already have existing strengths. Examples include aerospace in Jacksonville, cleantech in Portland, plant sciences in St. Louis, bio-med in Denver, health IT in Cleveland, and life sciences in San Diego, etc.

The emergence of autonomous vehicle technology in a city like Las Vegas is another example.

Las Vegas needs to vastly improve its transportation infrastructure due to record visitor volume every year, but the introduction of driverless cars on the Las Vegas Strip requires an unprecedented convergence of many different entities working in both government and private industry. That includes a combination of automotive, tech, and mobility/logistics companies; advanced artificial intelligence (AI) and IoT scientific research labs; the local/state governments to provide policy, funding and oversight; and myriad city agencies to coordinate infrastructure development.

One way to get outside companies to look at Las Vegas as a potential testing ground for their technologies, and ultimately a base for their operations, is by luring them to the city during conventions like CES, IBM World of Watson, and others. Those conventions provide a robust platform for new idea exchange in autonomous tech, AI, and many corollary industries.

Which means, in this case, conventions like those mentioned above and others are ultimately pumping new knowledge into Las Vegas' tech clusters to help drive long-term economic development for the city, and improve livability standards for area residents.

This is not new.

The first convention bureau in the U.S. launched in Detroit in 1896 to propel economic growth by convincing visiting convention delegates to start or expand manufacturing businesses in the city. The depression in 1893 and the industrial revolution added impetus to the strategy, and Detroit eventually became the wealthiest city in America by the early 1950s, based on the rise of its modern manufacturing sector spanning everything from medical instruments to automotive.

In the last five years, there has been a systemic surge of attention on the exact same strategy among convention bureaus across America. Cities are competing to attract high-tech companies to invest in their region, because to succeed in the 21st century, cities must grow their business,

scientific, and creative industries, along with the necessary talent pool to foster innovation in those industries. And just like in Detroit over 100 years ago during another period of massive technological disruption, cities are again leveraging their convention business to engage specific sectors to catalyze economic growth.

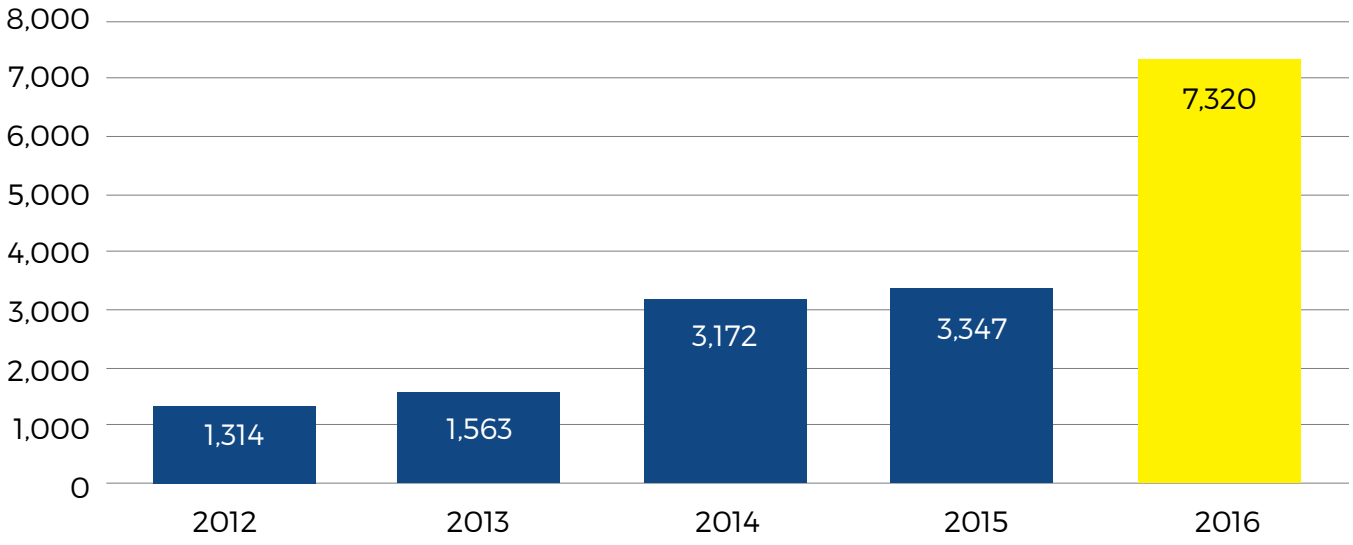
The challenge today is defining, evaluating, and tracking the long-term impact of conventions on a destination's economic development, beyond the traditional short-term metrics. To a large degree, there is relatively little research showing that process in action in the U.S.

1.1 THE GLOBAL WAR FOR HIGH-VALUE JOBS

Skift Take

The competition among cities to attract outside tech and creative industry companies to invest in their region, using conventions to help facilitate that, goes back decades. But the strategy has taken on growing significance in the last few years due to the rapid and all-encompassing digitization of business, requiring new talent to steward that shift.

In 2016, the number of new jobs developed in Southern Nevada with the assistance of the Las Vegas Global Economic Alliance (LVGEA) grew by nearly 5,000 salaried positions (+148%)



Las Vegas Global Economic Alliance

One of the biggest priorities for city and state governments today is driving job growth in the STEM and creative industries. The best way for governments to develop job growth in those industries is by increasing the number of relevant companies that hire people in their region.

"There is a global war for high-value jobs," said Jonas Peterson, president and CEO of the Las Vegas Global Economic Alliance (LVGEA), kicking off the annual Las Vegas State of Economic Development summit in February 2017. "In this war, regions are rising, regions are falling, and I'm pleased to report that Southern Nevada is a region on the rise.... We're winning battles for jobs because for the last decade Southern Nevada has been positioning itself as an ideal location for corporate investment."

In 2009 and 2010, according to Gallup, Nevada ranked last among all 50 U.S. states in new job creation. In 2016, it ranked first. Jared Smith, COO of the LVGEA, told Skift that conventions have played a significant role in luring outside corporate investment and talent to Las Vegas, while driving continued economic growth throughout the state.

> "AS TOURISM AND CONVENTION INFRASTRUCTURE CONTINUE TO GROW, WE SEE THIS AS AN OPPORTUNITY FOR SOUTHERN NEVADA TO ATTRACT MORE OUTSIDE JOBS, INVESTMENT, AND TALENT."
>
> — JARED SMITH, COO, LAS VEGAS GLOBAL ECONOMIC ALLIANCE

"Conventions that come to Las Vegas not only expose the rest of the world to Las Vegas, but also expose the local community to the rest of the world, giving them access to innovation that helps grow the destination's knowledge of emerging industry trends," Smith said. "As tourism and convention infrastructure continue to grow, we see this as an opportunity for Southern Nevada to attract more outside jobs, investment, and talent that leads to the creation of more economic diversity in the region."

The same assertion is shared by almost all mayors, city council members, directors of economic development agencies, and CEOs of convention and visitors bureaus (CVBs), and destination marketing organizations (DMOs) across the country. *[The terms "convention bureau/bureau," "CVB" and "DMO" are used interchangeably in this report, as well as "conventions" and "conferences," because industry leaders likewise vary in their usage in quotes throughout this report.]*

The Financial Times in March 2017 highlighted the demand for high-value jobs in the U.S.:

"America is a country of two labour markets, with jobs aplenty for PhDs and even more for burger flippers, but not enough in between. This is a problem in an economy that consists largely of consumer spending. But even if the U.S. was able to reverse globalization and

technological job disruption, the homegrown problem remains: the skills gap. Deloitte points to 3.5 million well-paid manufacturing jobs that will need to be filled in the U.S. by 2025. Yet two million will remain unfilled by Americans because neither high schools nor colleges are turning out enough technology literate and communications savvy students."

That alludes to another value that conventions in growth sectors bring to a city, which is rarely reported as an economic benefit. As Smith stated, corporate and association conventions provide local students and working professionals with access to new research and business intelligence to support their ongoing education and expand their professional networks of thought leaders in their specific industry.

1.2 POSITIONING DESTINATION MARKETING AS ECONOMIC DEVELOPMENT

Skift Take

Many, but not all, convention bureaus are pivotal players in their cities' economic development strategy. However, there are still perception challenges among some elected leaders in terms of exactly how CVBs are driving long-term economic growth. Part of that is because CVBs publish economic impact reports that generally focus on the more tangible economic benefits of conventions, including attendee expenditure, transient occupancy tax, and media value derived from the physical events themselves.

Any strategies revolving around using face-to-face meetings to spur sustainable economic growth in cities begins with government. Albuquerque Mayor Richard Berry, for example, emphasizes that the connection between growing convention business and growing his city's economy is fundamental.

"The idea of bringing thought leaders together from around the world to increase long-term economic development in Albuquerque is one of the foundations of what I've tried to do during my administration," he says. "When experts and creatives come to your city, they collide and cross-pollinate with our folks, and we gain from that. Those seeds that are planted during conventions can grow into great opportunities over time."

Because technology is continually shifting the very nature of industry in cities today, economic development organizations are increasingly committed to leveraging the role that high-priority conventions in the tech and creative sectors play in helping develop a city's innovation economy.

> "WE SEE OURSELVES AS AN ECONOMIC DEVELOPMENT ORGANIZATION, AND WE'RE CONTINUALLY MEETING WITH OTHER ECONOMIC DEVELOPMENT AGENCIES TO DISCUSS HOW WE CAN LEVERAGE OUR MEETINGS AND CONVENTIONS TO ADVANCE OUR COMMUNITY'S PRIORITIES."
>
> — DAVID GILBERT, PRESIDENT AND CEO, DESTINATION CLEVELAND

Erik Caldwell, economic development director for the City of San Diego, says his agency has been targeting conventions more consciously in recent years to meet with visiting investors and business leaders. He also says there is a growing examination in San Diego of the long-term economic benefits of that strategy, as well.

"Over the last few years we've really started to focus on increasing our global identity, increasing foreign direct investments, and trying to better compete on the business attraction, retention and expansion side domestically," Caldwell explains. "One of the pieces of hanging fruit that we've identified are conferences that come to town, and we've found that San Diego actually has a competitive advantage, or comparative advantage, with other communities in that many of the right conferences are already coming to us. So, it's been a process over the last few years of first coming to that realization."

The challenge for some convention bureaus is positioning themselves in the public sphere as economic development engines, versus being perceived merely as "tourism boards." Changing that perception is among the highest priorities for bureau leaders like Elliott Ferguson, president and CEO of Destination DC.

"It's important to recognize the fact that economic development organizations have not always viewed tourism and hospitality in the same framework as they look at economic development," Ferguson explains. "So the first thing is to get people in our city to understand that we, quite frankly, are looking at doing the same thing. What we're doing is creating jobs, and furthermore, our visitors pay into the hotel tax and other taxes. It's all economic development at the end of the day."

David Gilbert, president and CEO of Destination Cleveland, concurs, saying that leaders in urban communities across America sometimes look at CVBs as "a little bit of fluff." He explains that many elected officials and business people believe that convention attendees are going to come to a destination regardless of what the bureau does to promote convention business.

"So we try to be very deliberate about the quantitative data that shows certain growth in this community wouldn't happen if we didn't exist," Gilbert says. "We see ourselves as an economic development organization, and we're continually meeting with other economic development agencies to discuss how we can leverage our meetings and conventions to advance our community's priorities."

1.3 Q&A WITH PHILADELPHIA MAYOR JIM KENNEY

Skift spoke with Philadelphia Mayor Jim Kenney at the South by Southwest (SXSW) conference in Austin in March 2017. Mayor Kenney was on hand to welcome members of Philly's tech and creative industries attending the Amplify Philly dinner, where everyone discussed the impact of Philadelphia's growing innovation economy on redefining Philadelphia's business brand.

Skift: There's a lot of convergence of innovation taking place in Philadelphia lately in the tech, creative, business, medical, manufacturing, academic, and science sectors. What's driving that?

Mayor Jim Kenney: Some of it's organic and some of it's government understanding that they don't have the answers to everything, and sometimes they don't have the answers to anything. We've realized we can play a role by convening people together in the city and at conferences like South by Southwest here in Austin, and then getting out of the way. So we're listening to what these various groups are interested in, what they need, and then trying to get government to respond in a way that makes sense and moves the process forward, instead of, "This is our way, this is the way we do it." Well, we might do it that way now, maybe there's a better way to do it. Or we hear, "We've never done this before." Well, maybe we better start looking at it. So I'm excited about all this brain power in Philadelphia to help to make our services better and grow their businesses.

Skift: How important are conventions coming into Philadelphia to drive your city's economic growth, especially in your high-priority sectors?

Mayor Kenney: All I have to do is look at South by Southwest and the amount of brainpower and diversity everywhere, and the incredible offerings of the tech companies and other companies here to prove the value of conventions. For us, it was important getting the convention center in Philly straightened out. People were not coming for a while there, and we've had medical, scientific, and tech conventions in the past that said we'd never see them again, but now they're re-upping three and four years from now. So, conventions are very important to make Philadelphia known as a place to convene, where outside people can meet our people to continue creating economic growth for them and for our city. I think Austin has done a fantastic job in branding itself as that kind of destination. Philadelphia has the capacity to do that. In some ways we have done it, but there's more opportunity to do it better down the road.

Skift: Speaking with other cities, they're now promoting their local expertise in their innovation economy and knowledge industries as a selling point to attract conventions, versus just promoting a modern convention center and hotel footprint. Are you doing that?

Mayor Kenney: We're doing it ourselves and we're also looking to [our universities and companies like] Drexel and Penn and Comcast and others that can help us do that, and give us more credibility in that space. Governments in general are not always known for being progressive when it comes to allowing new industries and new ventures to grow, but as you can see here, it's something that we have to do. And I think if we take advice from people who know what they're doing and what they're talking about, we'll be much more successful.

Skift: Philadelphia has been developing a few innovation districts around the academic and medical research institutions to bring knowledge professionals together. How is that evolving?

Mayor Kenney: Everyone wants to work in coworking spaces today so they can collaborate with each other. Our innovation districts are popping up around the city where people in different businesses can interact with each other in a relaxed way, and develop their pipelines of innovation. We're seeing that grow on an ongoing basis, and I'm very excited about that.

Skift: Has there been any internal conversation in Philadelphia about measuring the long-term economic impacts of conventions on the growth of your innovation economy?

Mayor Kenney: It's not something I'm aware of but it's certainly interesting to understand the results down the road stemming from our conventions. That would be very useful, not just for the hospitality, tourism, and convention business, but all of tech, modern manufacturing, etc.

1.4 THE LONG-TERM COST OF LOST CONVENTION BUSINESS DUE TO CONTENTIOUS LEGISLATION

On April 8, 2016, the Charlotte Regional Visitors Authority in North Carolina suggested that the state's HB2 "bathroom bill" legislation, which denied various rights for the LGBT community, could result in lost convention business and events revenue worth "multiple millions." On March 27, 2017, the Associated Press (AP) published a special analysis on the long-term impact of HB2, stating: "The law limiting LGBT protections will cost the state more than $3.76 billion in lost business over a dozen years." Four days later, HB2 was repealed.

That is a significant economic impact, but it doesn't take into account the additional legacy impacts discussed in this report. Aside from the lost revenue resulting from the event cancellations, North Carolina's business brand reputation has been damaged as well. Also, the discriminatory law dissuades members of the LGBT community and others from relocating to the state, visiting for leisure purposes, or investing in businesses, and that sentiment will last for years, irrespective of HB2 going away. That is why there needs to be more focus on evaluating the legacy impacts of conventions so they can be accounted for in these situations.

The AP also suggested that its figure was conservative, because it only calculated lost business based solely on public statements by corporate and association leaders who explicitly said HB2 was why they cancelled proposed or contracted business. "The biggest impact is how many times our phones are not ringing now," Shelly Green, CEO of the Durham Convention & Visitors Bureau, told the AP. She explained that the region lost more than $11 million in canceled convention business that it knows of, but the number could be much higher because organizations often don't share why they stop considering a city. "There are a lot more meetings that have canceled, but we don't have data on them," Green said.

"I won't place a meeting in North Carolina," adds Jim Clapes, conference manager for the Drug Policy Alliance, who organizes a 1,600-person convention revolving across the U.S. "We won't support cities or states with anti-LGBT policies in place."

1.5 INNOVATION THAT MATTERS: TOP 25 U.S. CITIES PREPARED FOR THE DIGITAL ECONOMY



Startup 1776's "Innovation That Matters 2016" report ranked the most technologically advanced U.S. cities

Skift Take

U.S. convention bureaus are now promoting their expertise in priority sectors, and leaders in those sectors, as a primary sales strategy to engage innovative meeting planners and differentiate their cities' value proposition.

The Startup 1776 incubator in Washington, D.C. published the above chart in its "Innovation That Matters" survey, showing the top 25 U.S. cities that are developing technology to power their economic growth in the 21st century.

Just like certain cities thrived as major commerce centers during the 20th century industrial era, the 25 tech-friendly, highly networked urban metros in the Startup 1776 report are emerging as leaders in the digital era.

> “WE’RE TRYING TO GET PLANNERS TO UNDERSTAND THAT OUR ASSET BASE OF EXPERTISE CAN HELP SHAPE THEIR CONTENT, AND REDEVELOP THEIR SHOW AS A WHOLE.”
>
> — MELISSA RILEY, VP OF CONVENTION SALES & SERVICES, DESTINATION DC

The preceding chart illustrates how cities are being ranked by their technological progress. This is increasingly important for convention organizers who want easy accessibility to local companies and research institutions within a destination’s technology and digital industries, which applies to both the business and creative sectors. Cities, in turn, are starting to promote to planners the availability of access to their area’s most innovative companies as a main pillar of their regions’ competitive advantage and value proposition.

According to Melissa Riley, VP of convention sales & services at Destination DC, the nation’s capital is elevating the level of conversation with meeting planners exactly this way by highlighting the District’s diverse tech sector. She explains that Destination DC is now actively promoting their advanced industries, and access to the local people leading those industries, to show how meeting planners can integrate a wider range of thought leaders into their event programming.

This is expanding on the typical convention sales conversation promoting the quality of conference centers, hotels, and walkable downtown districts. In effect, it’s a shift from selling a city’s physical hardware to selling its intelligence software and knowledge capital.

“Every city has traditionally sold themselves the same way, where everybody’s got a new convention center, everybody’s got new hotel inventory, everybody’s got great restaurants, great parks, and 40 miles of biking paths,” says Riley. “Now we want to highlight to the meeting planner community and the business community the intellectual assets we have, and our access to government that no one else has. That can help meeting planners enhance their content and programming, drive their exhibitor base, drive delegate counts, and drive sponsorship to make their events more profitable.”

But how is that strategy and messaging resonating with meeting planners?

“It’s resonating more and more,” Riley says. “We’re trying to move beyond dates, rates, and space. We’re trying to get planners to understand that our asset base of expertise can help shape their content, and redevelop their show as a whole. So I would say this is resonating with planners who are more innovative, in general.”

2. HOW THE MEETINGS AND CONVENTIONS INDUSTRY IS UNDERVALUING ITSELF



TOURISM AUTHORITY PROGRAMS DELIVER TOURISM REVENUES

DELIVERING RETURN ON INVESTMENT

With an operating budget of $32.7 million, SDTA sales and marketing generated 4.7 million room nights for the San Diego Region in FY 2015.*

RETURN ON INVESTMENT*

$30 TO $1

* Based on lodging revenue generated for the City of San Diego Tourism Marketing District (FY15).

FY 2016 KPIs (KEY PERFORMANCE INDICATORS)

GOALS

- Deliver maximum hotel room nights to Tourism Marketing District hotels.
- Produce over 900 million paid advertising gross impressions.
- Generate an estimated 9.3 million visitor inquiries through the website, social media, e-mail and phone.
- Deliver $27 million in unpaid media exposure through earned media (unpaid editorial); unpaid media promotions and cooperative advertising partners.
- Elevate the San Diego brand and broaden context of San Diego's diverse travel product.
- Leverage all SDTA's marketing assets across **Bought + Earned + Owned** channels in order to increase San Diego's share of voice.
- Focus on developing new markets and audiences for the destination.
- Align programs with Visit California and Brand USA in order to maximize efficiency.
- Deliver strong return on investment for all major programs.
- Support the membership by providing value and opportunity to effectively reach the marketplace.

GUIDING PRINCIPLES

- Act as the collective voice of the destination and do what individual organizations can't do by themselves.

REGIONAL ECONOMY IS DEPENDENT UPON STRONG TOURISM DEMAND

SAN DIEGO TOURISM INFRASTRUCTURE

Market Composition	89% Leisure, 11% Business (all visitors)
Number of Hotels	473
Number of Hotel Rooms	58,333
Number of Hotel Rooms in the City of San Diego Tourism Marketing District	40,702
Hotel Room Nights Mix	74% Leisure/Transient, 25% Group
Annual Airline Passengers	10 Million
Annual Attendance at Major Attractions	14.6 Million
Total Indian Gaming Properties	10 Casinos
Cruise Passengers	214,671 passengers total, 74,729 embarking passengers
Number of Golf Courses	97
Number of Arts Institutions	85
Number of Craft Breweries	123

THE POWER OF THE SAN DIEGO BRAND

SAN DIEGO: The San Diego Brand is built on a foundation of inspired optimism and positivity. Our unique blend of great weather, outdoor lifestyle and friendly people infuse our region with an upbeat, anything's possible attitude. San Diego's good vibes are combined with scenic splendor, diverse product and an abundance of activities. This blend of **people + place + climate** is what elevates our customers' mood and makes us a destination like no other.

BRAND PLATFORM—**SAN DIEGO OWNS A SUNNY OUTLOOK**

THE PEOPLE + THE PLACE + THE CLIMATE = **INSPIRED OPTIMISM**

SAN DIEGO CONVENTION CENTER (2015)

- 71 Primary Conventions
- 553,283 Attendees
- 693,772 Contracted Room Nights
- $620M in Attendee Spending

SAN DIEGO COUNTY HOTEL ROOM NIGHT MARKET MIX

(% ROOM NIGHTS SOLD)

Skift Take

Economic development organizations say there's demand for better evaluation of the long-term economic and innovation impacts attributed to conventions. Therefore, new efforts are underway to characterize those impacts with a wider range of case studies illuminating the business outcomes.

Almost all CVBs publish annual economic impact reports publicly, similar to the above 2015 report from the San Diego Tourism Authority. According to the chart, 23 percent of visitor traffic flowing into San Diego was for the purpose of meetings and conventions, resulting in almost one out of four of the 4.7 million room nights booked in the city that year.

Overall, the 553,000 convention attendees spent $620 million in the destination, delivering significant economic impact to the city and supporting thousands of local jobs.

> “WE HAVE A CONFERENCE ALIGNMENT WORKSTREAM WHERE WE COLLECT CONFERENCES IN OUR HIGH GROWTH SECTORS, ESPECIALLY IN BIOTECHNOLOGY AND LIFE SCIENCES, MARITIME TECHNOLOGY, AND CLEAN TECHNOLOGY.”
>
> — NIKIA CLARKE, EXECUTIVE DIRECTOR, WORLD TRADE CENTER - SAN DIEGO REGIONAL ECONOMIC DEVELOPMENT CORPORATION

However, there are few details about the impacts that conventions in San Diego delivered to the growth of the city’s knowledge industries and innovation economy over the long term. The high-tech growth sectors are where the competitive advantage for most U.S. cities exist, and yet, there’s relatively no focus on the value of conventions to improve that competitive advantage in most CVB impact studies.

That’s slowly evolving to varying degrees in certain cities. For example, there’s been a growing effort in recent years among San Diego’s economic development agencies to collaborate more effectively with the San Diego Tourism Authority to capitalize on visiting conventions. While that collaboration between the CVB and economic development community is not expressly detailed in the bureau’s report, everyone agrees it’s an important factor driving economic growth in the city.

“We have a conference alignment work stream where we collect conferences in our high growth sectors, especially in biotechnology and life sciences, maritime technology, and clean technology,” explains Nikia Clarke, executive director, World Trade Center - San Diego Regional Economic Development Corporation. “These are the sorts of high-growth industries that we have big globally competitive clusters in, and that we want to continue to engage and develop.”

Measuring that long-term economic development in those competitive clusters, however, based on the knowledge sharing taking place at conferences in those sectors, is another thing. “That’s something that we don’t measure now,” says Caldwell. “If somebody could figure out how to quantify that, that would be huge, because ultimately that’s the goal.”

Clarke supports that, explaining that there are well-measured economic impact reports of particular conferences for their duration in the city, but she questions the ability to expand on that over the long term.

‘We can say what the economic impact of Comic-Con or BIO is,” says Clarke. “However, in terms of partnering with our research institutions to actually measure the value of our conferences in the long term, that’s not something that we’ve done, either targeted or tactically. It’s funny, because my background is in research, and I’m just thinking about that puzzle. It seems like a very difficult thing to measure in a longitudinal way.”

Like Caldwell and Clarke, most convention bureau leaders agree that the legacy impacts of conventions as innovation and economic drivers are difficult to measure. Quantifying the spend on hotel rooms, event venues, and restaurant meals during the specific time frame of a conference is easy. Quantifying how a meeting at a conference led to a new medical research facility two years later in the event's host destination is challenging, and impossible to scale destination-wide.

In addition, there is also a general lack of collective understanding when it comes to the entire scope of just what the long-term impacts of conventions are.

"The difficulty here is that every single event has a different set of objectives, so therefore every single event is going to have different kinds of legacies and leave-behinds in the community to measure," says Rod Cameron, executive director of the Joint Meetings Industry Council (JMIC). "We need to make sure that we advance in the area of getting more credible value measurements around the economic policy benefits, as opposed to simply spending benefits, certainly. But to try to generalize it to the point of saying, 'This is the quantified impact that a convention leaves behind in a city,' is, I don't think, ever going to be possible."

Because convention bureaus and economic development agencies don't have those hard measures to meet the test that governments typically want to apply to policy positions, Cameron asserts that the industry needs to instead develop case studies specifically focusing on the economic development legacies of conventions. Toward that end, the JMIC launched "The Iceberg" initiative in 2016 to develop a platform for those types of case studies.

"The interesting thing is that intuitively, most governments get it," Cameron suggests. "They understand the policy benefits and the political benefits associated with hosting a major event in some area that they see as being their economic future, or their community development future. So when you have the conversation with them about these broader benefits that conventions bring, inevitably they pick up on it. And they're usually okay with the story approach because, at the political level certainly, that's where they live."

There's also a new challenge increasingly disrupting how cities and meeting planners measure the short-term impacts of conventions. Gregory O'Dell, president and CEO of Events DC, explains that more attendees are booking outside their dedicated room blocks due to changing business travel behaviors, including the rise of home-sharing. Those room nights are typically not tracked by planners, which therefore is direct economic development that's not accounted for.

"Cities are struggling with how they're capturing the economic benefits around events, because in some cases the traction of room nights is diminishing," O'Dell explains. "When people go outside their block, we may not capture the real benefit of what's happening at an event. But then there's always been this intangible about what the leave-behind is in a city from having leaders of industry and that knowledge base come to your city. So, while I think it's been a long time coming to try to measure that effect, we can all speak to examples anecdotally."

2.1 A LACK OF SPECIFIC U.S. RESEARCH IS HAMPERING THE UNDERSTANDING OF A CONVENTION'S LEGACY IMPACTS

Skift Take

While different stakeholders in the travel industry have produced voluminous research on the economic impacts of tourism development, there is a greater need for more research specifically examining the long-term benefits of conventions on a city's innovation economy.

In the U.S., many leaders in hospitality and tourism point to several economic development and strategy studies in recent years that highlight the economic impact of visitors on a destination's overall growth. A few of the most prominent reports are:

1. Destination Promotion: An Engine of Economic Development; Oxford/Tourism Economics, 2014
2. The Economic Significance of Meetings to the U.S. Economy; Convention Industry Council, 2009-16
3. DestinationNEXT; Destination Marketing Association International, 2014-15
4. The Halo Effect of Tourism; Longwoods International, 2015-2016

The above research projects have proven valuable toward elevating the conversation around the economic impact of business and leisure travel, but none of them focus exclusively or in-depth on the legacy impact of conventions.

The Oxford Economics report (produced by the organization's Tourism Economics division) examines how investments in the visitor economy impact more than the tourism and hospitality sectors. This report is the industry benchmark for insight into the growing relationship between tourism and economic development. However, the report highlights the meetings and events industry only briefly — just five pages in the 60-page report — with minimal discussion dedicated to the impact of conferences driving a city's innovation sectors.

The Convention Industry Council's paper, produced by PricewaterhouseCoopers, focuses on the "direct, indirect, and induced effects" of conferences in general, and the macro/micro scope of the industry at length, but not the impacts of conferences specifically on a city's knowledge industries. This research is continually being updated, and it's potentially one of the better platforms to expand on the discussion of legacy impacts with more detailed case studies.

DMAI's extensive DestinationNEXT research polled over 340 international DMOs for their insight into trends disrupting the destination marketing industry. The research resulted in three "transformational opportunities" for bureaus to pursue moving into the future, including: more strategic

collaboration between DMOs and economic development agencies; more strategic two-way, content-driven digital communications; and a more active role in product development and destination management. The DMAI research discussing DMO alignment with economic development, however, doesn't delineate significantly between leisure tourism and convention business.

The Longwoods research on the Halo Effect of tourism promotion has earned positive reviews from many destination marketers, economic developers, and governments, because the insights prove how mass-market tourism advertising campaigns influence overall brand perception and drive relocation. However, again, the research doesn't examine the economic and innovation drivers directly related to conferences in high-growth sectors.

> "I THINK EVERYONE NOW IS LOOKING MORE AT THE ECONOMIC SIGNIFICANCE OF A MEETING, DEEPER THAN WE EVER HAVE BEFORE, BEYOND JUST WHAT IT MEANS IN THE SHORT-TERM."
>
> — DON WELSH, PRESIDENT AND CEO, DESTINATION MARKETING ASSOCIATION INTERNATIONAL

For the Oxford/Tourism Economics report, seven U.S. city and state DMOs partnered to support the research: Explore Asheville, Visit California, Choose Chicago, Destination Cleveland, Visit Denver, Louisiana Travel, and Visit Phoenix. Don Welsh, president and CEO of Destination Marketing Association International (DMAI), was the head of Choose Chicago when the report was produced.

"The Tourism Economics report opened people's eyes, and I think everyone now is looking more at the economic significance of a meeting, deeper than we ever have before, beyond just what it means in the short term," Welsh says. "In Chicago, the tech, scientific, and engineering conferences helped spawn the creation of 1871, which is a tech incubator that now has hundreds of different organizations, big and small, and we worked on developing that in conjunction with World Business Chicago."

David Gilbert, president and CEO of Destination Cleveland, says his organization was the catalyst that brought DMAI and the six other DMOs together to produce the Tourism Economics research.

"I think the Tourism Economics report got a little light bulb to go off in people's minds, because before when we tried to find research that connected travel and tourism to economic development, we found that really nothing existed," he says. "But I think looking at the long-term benefits that meetings and conventions specifically deliver to a community is the next great evolution. It's difficult to measure, but I would say it's something that we need to do a better job of exposing."

2.2 BUSINESS EVENTS SYDNEY RESEARCH: LOOKING BEYOND THE DELEGATE SPEND

Skift Take

U.S. convention bureau, economic development, and academic leaders should study Business Events Sydney's thought leadership around the legacy impacts of conventions to develop a similar research template for their own cities.

From a global perspective, the conversation around evaluating the legacy impacts of conventions in high growth sectors began in earnest in 2010 with a joint research venture between Business Events Sydney (BESydney) and the University of Technology Sydney (UTS).

The following four reports, published under the umbrella name of "Beyond Tourism Benefits," form the most comprehensive blueprint framing the growing collaboration between convention bureaus, economic development agencies, academic institutions, and governments to leverage conventions for the long-term benefit of both the host destination and all participating stakeholders and attendees:

- A Scoping Study of Business Events: Beyond Tourism Benefits; BESydney/UTS, 2010
- Beyond Tourism Benefits: Measuring the Social Legacies of Business Events; BESydney/UTS, 2011
- FCCI/Beyond Tourism Benefits: Building an International Profile; BESydney/UTS, 2014
- Conferences: Catalysts for Thriving Economies; BESydney/UTS, 2016

Lyn Lewis-Smith, CEO of Business Events Sydney, and professors Deborah Edwards and Carmel Foley at University of Technology Sydney, are the principles behind the development of the Beyond Tourism Benefits research.

"The Beyond Tourism Benefits report was commissioned because we wanted to educate and inform our government at the time about the benefits of the convention industry," says Lewis-Smith. "My personal belief was that the legacy of business events benefits were beyond, and much greater than, the delegate expenditure, and governments were too focused on the numbers and not the greater good, if you like."

With the newly published research in hand in 2011, Lewis-Smith approached a variety of different ministers who were instrumental in developing the regional government's new 20-year "Infrastructure New South Wales" strategy at the time. The government's strategic framework was designed as a road map to guide the future development of critical public infrastructure.



From "Conferences: Catalysts for Thriving Economies"; BESydney/UTS, 2016

Lewis-Smith's primary message to the ministers emphasized that the value of conferences shouldn't be measured by attendee spend alone, and the long-term economic development generated by conferences can take as long as 10 years or more to reach fruition sometimes.

She supported her message with examples from the Beyond Tourism Benefits research, including the development of the US$213 million Charles Perkins Centre that conducts research into obesity, diabetes and cardiovascular disease at the University of Sydney, which in part resulted from hosting the International Congress of Obesity in 2006.

That combined convention growth and economic development strategy continues to this day. As someone who's in a position to decide what events BESydney bids on, Lewis-Smith still meets regularly with government ministers to describe the most important conferences in each of the elected leader's relevant sectors. Furthermore, she says, the Beyond Tourism Benefits research informed the decision to build the new ICC Sydney convention center that opened in late 2016.

"So we're not just going to a tourism minister; we're also meeting with the health minister, the minister of industry, the minister of trade, and then we use our research to demonstrate how we will attract international business events to deliver on the objective of the government's industry strategies," explains Lewis-Smith. "That's how all of this first really unfolded. We got the government's attention with Beyond Tourism Benefits, and that ultimately influenced the decision

to build a new convention center. That partnership with government to attract some of the biggest events today, I'm hoping, will solve some of the big issues here in Australia, which are also global issues."

To begin to collect the necessary data to support their initial Beyond Tourism Benefits research, professors Edwards and Foley surveyed the delegates of five major Australian conferences between 2007 to 2010. The first report, "A Scoping Study of Business Events: Beyond Tourism Benefits (2010)," reads:

> "The [five] events brought the world's best practice and international knowledge to local sector researchers and practitioners in the fields of medicine, law, sport, and the environment. Growing Australian knowledge has contributed to capacity building within each sector. The events have exposed delegates to new knowledge and ideas which have been incorporated into educational offerings. Delegates have been exposed to local knowledge, research capacity, sites and facilities, and this has increased the attractiveness of Sydney's education sector. This growth in the education sector has wider benefits for increasing the future capacity of New South Wales in the various sectors. The events have provided Sydney organisations, associations, and research centres with new funding from both the Federal Government and private sector. This has allowed growth in the research capacity of each sector."

"One of the key things for host destinations is that locals have access to information they might not have otherwise," Professor Foley explains. "At the same time, new networks are formed to increase international collaboration. These events also bring into the destination cutting-edge researchers, techniques, and technologies.... The evidence in our research showed to government that these events are energizing key sectors in many ways that the government is interested in supporting."

> "WE'RE NOT IN THE TOURISM BUSINESS. WE'RE IN THE BUSINESS AND INNOVATION BUSINESS."
>
> — LYN LEWIS-SMITH, PRESIDENT AND CEO, BUSINESS EVENTS SYDNEY

That initial intelligence provided the foundation for subsequent reports, leading up to the 2016 research: "Conferences: Catalysts for Thriving Economies." Part of that research includes three synopses outlining the legacy impact of conventions specifically for governments, associations, and local communities. According to Professor Edwards, the biggest message coming out of the Beyond Tourism Benefits framework suggests that convention bureaus should be positioned as economic development organizations.

"Convention bureaus have typically come under the tourism remit," she says. "But what our research shows is that convention bureaus really should come under the remit of the industry and trade ministries, which usually have more funding attached to them."

"We're not in the tourism business," sums up Lewis-Smith. "We're in the business and innovation business."

3. DEFINING AND PRIORITIZING THE LEGACY IMPACTS OF CONVENTIONS

Skift Take

While convention bureau leaders understand the legacy economic impacts of conventions, the benefits are not clearly defined for city stakeholders and the meetings industry at large.

Before city leaders and the U.S. meetings industry can begin to evaluate the business outcomes of conventions over the long term, there needs to be a greater consensus about what those legacy impacts actually are.

Skift polled 25 U.S. CVB senior executives to gauge how much importance they attribute to a variety of long-term economic impacts derived from convention business. Questions were posed in different formats, requesting either percentage evaluations or open-ended answers.

QUESTION #1: How much importance do you place on the following economic impacts of conventions on your community's long-term growth?

	Critical	Important	Nice to have	N/A
Motivate attendees to return as tourists	81%	12%	7%	0%
Position the destination as a regional hub of innovation	46%	38%	12%	4%
Attract outside talent in knowledge and creative industries	38%	42%	20%	0%
Implement local/state government initiatives to drive sector development	35%	42%	19%	4%
Promote local academic and scientific community to a global audience	35%	31%	27%	7%
Provide opportunities for local businesses to develop new customers	31%	35%	31%	3%
Provide a range of networking opportunities for young professionals	31%	31%	35%	3%
Attract outside corporate investment and relocation	27%	62%	11%	0%
Promote local industry sector expertise to a global audience	27%	54%	19%	0%
Support the development of new academic and scientific research facilities	23%	27%	35%	15%
Promote the destination as a potential place to live	19%	42%	39%	0%
Promote the destination as a potential place to attend university	19%	19%	50%	12%
Inspire collaborative research projects between local and visiting scholars	15%	42%	35%	8%
Increase opportunities for cultural exchange and knowledge sharing	8%	54%	35%	3%
Generate opportunities for two-way trade	4%	58%	31%	8%

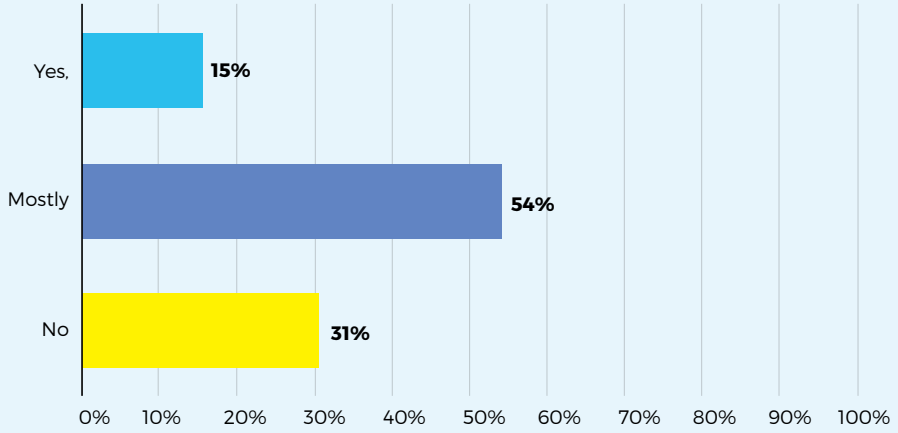
QUESTION #2: What do you feel are the most valuable impacts of conventions on your destination, NOT including hotel/tourism spend?

#	Responses
1	Showcasing our area for future business development, especially in the science and engineering arena. Outside investment from companies who are looking for opportunities. Exposure and collaboration with local economic development experts.
2	Exposing our destination's core competencies to national thought leaders and influencers. Providing a forum for local experts to engage with visiting groups related to their area of expertise.
3	Opportunity to create positive economic benefits for small businesses and minority businesses. Connecting local products, services and amenities to conferences is a tie to the destination and increased interest for delegates to buy those products/services post-convention.
4	Enhancing perceptions of our community, leveraging (and showcasing) local knowledge-base assets, supporting redevelopment in the urban core and providing retail amenities to residents that couldn't be supported without convention activity.
5	Awareness of the destination, value of the conference in education to local stakeholders, and potential prospect of a future resident, employee or company relocation because they met in the destination.
6	Motivate attendees to return as tourists, and help position the destination brand as a stronger regional hub for innovation.
7	In addition to revenues provided to local communities, it's the amenities made possible through visitor taxes as well as the strength and stabilization of quality of life outlets, including restaurants and retail.
8	Some businesses have chosen to relocate after being at a conference here. There is also segment of individuals who have chosen to move their families here. We work closely with our ED office on companies and developments they recruit... always have.
9	Motivate attendees to return as tourists, re-locate, and/or invest in community.
10	Exposure to a new audience that may not have traveled to our destination otherwise. Opportunity for our community to be showcased as a place to bring business, i.e. relocate or open a new facility.
11	Help to implement local and/or state government initiatives to drive economic development initiatives!!
12	Exposure to the destination, connections for the conference/conference attendees to local corporations and businesses.
13	Exposing new people to our community as a place to live, start a business or grow a business. It all starts with a trip and that happens many times through conferences.
14	Definitely helps the local government drive economic development initiatives.
15	Build repeat business, future conference, bleisure and leisure vacation visits, creates jobs, saves local county taxes, builds economy, grows tourism. Jobs, did I say JOBS!
16	Opportunity to introduce city for future economic development opportunities and for talent recruitment.
17	Exposure to the destination to generate return stays.
18	Introducing business leaders to our community.
19	Able to introduce our city to others and connect to our business sector.
20	Awareness, new buyers.
21	Jobs.

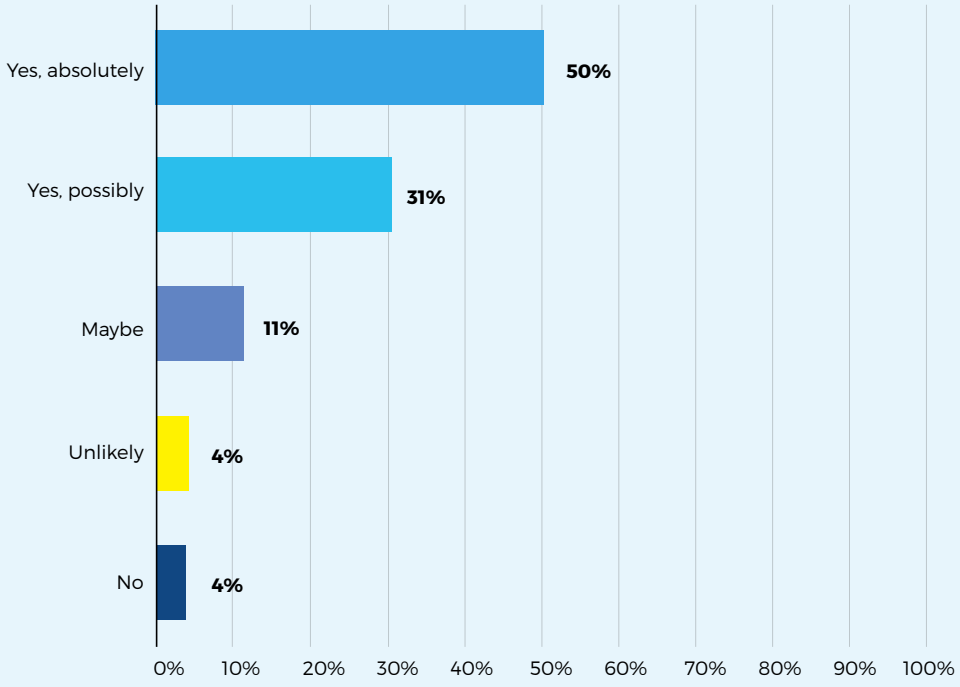
QUESTION #3: Where do you see the biggest challenges to evaluate the long-term impacts of conventions on your innovation economy?

#	Responses
1	No formal standardized methodology or mechanism in place currently to measure and track impact in above noted categories.
2	Finding the right people to be aware of these conventions - for the media to cover these conferences and for the local economic development professional to understand the value of these conferences to their organizations.
3	Multiple destinations under our brand. Being fair to all areas.
4	Political environment is skeptical of impact.
5	Translating that information into "news you can use" for the general public and elected officials, using references and language that matter to Joe/Joan Public.
6	Real, dependable measures.
7	Budget and lack of research data to share with stakeholders.
8	Staff and funding.
9	The challenge is in working with local government and other economic development groups to reach the common goal of strong community growth. Working to develop and build long-term plans that are implemented is a challenge.
10	Lack of resources (staff and money).
11	Quantifiable impact information. People like numbers and sometimes those are hard to get without significant research investment.
12	Having a local government believe in what we are doing and be on board with our mission because in the end, it will only benefit the progress of our community.
13	Building and keeping the focus on the collaboration locally after events have come and gone.
14	Politics and lack of appreciation. Small CVB teams have no staff to get the word out locally and no funding for local promotions to blow their own whistle. Lack of interest due to lack of education on the impact of meetings and tourism.
15	Ability to track if a conference actually had an impact.
16	Actual metrics to support claim.
17	Conferences are less than 9% of our tourism mix and hotels rarely share information on the conferences unless it came from one of our leads, so we really can't tell a story.
18	While intuitively appealing and true, the concept of legacy impacts is abstract and difficult to quantify as there are not clear cause-effect pathways.
19	Our destination doesn't have a sales tax so it's difficult to quantify the impact to local businesses, although we use economic impact calculators. There are also silos in business sectors where tourism/conventions are not seen as a value add as much as tech and other traded sectors.
20	Advocacy and education of municipal and elected officials.

QUESTION #4: Based on the variety of aforementioned economic impacts delivered by conventions over the long term, beyond the hotel/tourism spend, do you feel your bureau is adequately communicating the full impact of conventions to your local government and business community?



QUESTION #5: Do you feel if your bureau was better able to show research proving the long-term economic impacts of conventions on your destination's innovation economy, beyond the immediate hotel/tourism spend, it could help further validate and/or support requests to increase public funding?



Two more poll questions asked if respondents feel there is a direct correlation between evaluating the long-term economic impacts of conventions and the level of funding a CVB receives to promote the destination to convention organizers.

More than four out of five (81%) responded 'Yes" or "Yes, possibly" that there is a positive correlation.

4. CASE STUDY: WASHINGTON, DC LEVERAGES CONVENTIONS TO DEVELOP ITS TECH SECTOR



Skift Take

The Washington, D.C. Mayor's Office is leading a citywide initiative to position the nation's capital not just as one of the country's leading technology hubs, but also its most inclusive. Adopting the banner of "Inclusive Innovation," the District is leveraging its high percentage of minorities and women in the local tech sector to attract more tech conventions with a diverse audience base.

Washington, D.C. was ranked the #2 city for tech jobs in the U.S. by Bloomberg in 2017, and a top five most future-ready city by Dell, which both acknowledge the emergence of the city as a global technology leader over the last decade.

To capitalize on that local knowledge base and drive continued growth in the city's startup community, Destination DC published a new white paper in early 2017 showcasing the region's tech sector in an effort to attract more tech industry meetings and conventions. The report, "Innovation Capital: Meetings & Conventions in a Tech Hub," provides comprehensive information on the growth of the tech scene for tech companies considering hosting a meeting or investing in the city. The content highlights items such as the number of VC funds in the city, the percentage of higher

> "WE ARE THE #1 CITY FOR FEMALE ENTREPRENEURS AND THE BEST PLACE FOR PEOPLE OF COLOR IN ENTREPRENEURSHIP AND INNOVATION. SO WE ALREADY HAVE THOSE BASIC COMPETITIVE ADVANTAGES. WE JUST REALIZED WE NEEDED TO TALK ABOUT THEM A LOT MORE."
>
> — BRIAN KENNER, DEPUTY MAYOR FOR PLANNING AND ECONOMIC DEVELOPMENT, WASHINGTON, D.C.

degrees in STEM fields per capita, and private tech companies like the Startup 1776 incubator, which was one of the city's early tech accelerator success stories back in 2013.

The strategy to build the tech sector in D.C. began in earnest in 2010 when The Office of the Deputy Mayor for Planning and Economic Development (DMPED) published an Innovation Strategy report to foster and support the growth of startups. Today, the D.C. region now includes more than 1,000 startups, five of the top 100 investors in early startup tech and biotech companies, and 185,000 high-tech employees.

The payoff of that growth is the increasing volume of tech industry conferences taking place in the city. For example, the TechConnect World Innovation Conference in D.C. in May is going to co-located for the first time by the Nanotech 2017 Conference, the National Innovation Summit, and the National SBIR/STTR Conference, the latter of which caters to small business entrepreneurs.

The research around tech meetings also provides a new platform to support Destination DC's convention sales efforts to position D.C. as a tech capital. According to Elliott Ferguson, president and CEO of Destination DC, many established global tech companies have lobbying offices in the city, but they haven't always traditionally regarded D.C. as a tech powerhouse. That's changing because there's now a critical mass of leaders in the local tech economy that's appealing to the companies that D.C. is wooing for both meetings and long-term investment.

"The city is investing in real estate and infrastructure that meets the needs of a lot of these types of tech companies," Ferguson explains. "It's important that those organizations that we're trying to attract recognize what's happening here, and how we can make our tech sector work for them and their meetings. The Innovation Capital report is an important part of that process."

Melissa Riley, VP of convention sales & services for Destination DC, adds, "We always highlight the city's attractions to motivate meeting planners to choose D.C., but now we're also talking about the amount of tech and digital innovation coming out of the universities, hospitals, and our more than 1,000 startups. Their ambassadors and founders can point conferences in a whole new direction."

Gregory O'Dell, president and CEO of Events DC, says making the D.C. tech sector work for visiting companies means delivering a more connected convention delegate experience that helps attendees more easily meet the relevant people in the local tech economy.

"But it's not just about bringing tech events here; it's also about looking at a broader picture about bringing an expanded tech ecosystem here as well," says O'Dell. "For example, right now we're looking at eSports, or e-gaming, events that we think our destination would be perfectly suited for. When you see places like 1776 and other tech companies growing here, that's been fertile ground to draw even more new tech companies to come here. So now we're building and attracting the support for an entire eSports industry ecosystem, versus working just to attract eSports events."

The Rise of Inclusive Innovation

D.C. Mayor Muriel Bowser is intent on differentiating the tech sector and the tech meetings experience in her city by focusing on the District's high level of diversity in advanced industries, compared to national averages. For 2016, U.S. Census figures show that Washington, D.C. has the highest percentage of African Americans working in STEM jobs in the country, and the Institute for Women's Policy Research states that D.C. is the #1 city in the U.S. for women's employment and earnings, with the lowest gender pay gap in the country.

In late 2016, Mayor Bowser rolled out the citywide "Inclusive Innovation" campaign to promote the District's diversity in its tech sector. Providing the foundation for the initiative, the Mayor's Office published the "Pathways to Inclusion" report in November 2016, which profiles the current state of inclusion in D.C.'s tech economy.

The announcement for the report reads: "The 'Pathways to Inclusion Report' was cultivated from a commitment by Mayor Bowser and her Innovation Technology Inclusion Council to expand on the District's innovation economy in a way that will serve as a national model for inclusion and diversity. This report is the first of its kind for the District, providing a road map to create an inclusive ecosystem where the tech and innovation economy can grow."

The overarching goal is to communicate to corporate leaders that all of their employees, regardless of who they are or where they come from, will feel welcome in the capital. It also emphasizes to convention organizers, who have groups with diverse demographics, that all of their attendees will be welcomed with the same level of hospitality.

"We are the #1 city for female entrepreneurs and the best place for people of color in entrepreneurship and innovation," says Brian Kenner, deputy mayor for planning and economic development in D.C. "So we already have those basic competitive advantages. We just realized we needed to talk about it a lot more. We want people who may not look like every tech founder in London or Silicon Valley to think – when they come here to start a company or visit for a conference – 'D.C. is a place where I can feel at home.'"

According to Kenner, the city's diversity and focus on inclusivity is also supporting significant population and corporate relocation growth in the region. "Part of what's driving Inclusive Innovation is based on the fact that companies are increasingly saying they want to be located where their future employees are located, so we've been very intentional about how we're trying to market ourselves," he explains. "Washington, D.C. has really benefited from that positioning, because we're seeing about 1,000 people move to the city per month."

5. CONVENTION BUREAUS AND ECONOMIC DEVELOPMENT AGENCIES ARE POSITIONING CITIES AS KNOWLEDGE COLLISION SPACES



The Boston Innovation District has completely reshaped the Boston Seaport and convention center area.

Skift Take

Cities are repositioning their downtown cores as "Innovation Districts" to better connect their high-tech and creative industries, research institutions, cultural venues, and convention center districts. The goal is to create a richer attendee experience with more opportunities for organic networking and knowledge sharing between local and visiting industry leaders.

In 2014, the Brookings Institution launched a research series called "The Rise of Innovation Districts," profiling the emergence of a new urban model sweeping across many of the world's revitalized downtown cores. Innovation districts are characterized by a convergence of startup and legacy high-tech companies, business and creative industry professionals, academic and cultural institutions, and mixed-use commercial development, often in close proximity to a city's convention center.

For the purposes of this report, think of innovation districts as urban co-working spaces for convention attendees and local professionals, where there's a high compression of the brightest and most creative minds congregating in a communal environment.

> “OUR MOST CREATIVE INSTITUTIONS, FIRMS, AND WORKERS CRAVE PROXIMITY SO THAT IDEAS AND KNOWLEDGE CAN BE TRANSFERRED MORE QUICKLY AND SEAMLESSLY.”
>
> — BRUCE KATZ, FOUNDING DIRECTOR OF THE BROOKINGS INSTITUTION’S METROPOLITAN POLICY PROGRAM

The Boston Innovation District is one of the most well-established examples of these knowledge hubs in the U.S., which has completely revitalized the Boston Seaport surrounding the Boston Convention & Exhibition Center. The district has become a magnet for new startups in the tech and media industries that convention organizers can integrate into their programming.

Cities from Tallahassee to Chattanooga are adopting the innovation district label for their high-tech and creative industry hubs, while others are branding them differently, such as Cleveland’s “Health Tech Corridor.” But the idea is the same. These are designated areas designed as a platform for spontaneous conversations between creative people to bridge innovative thinking across all sectors.

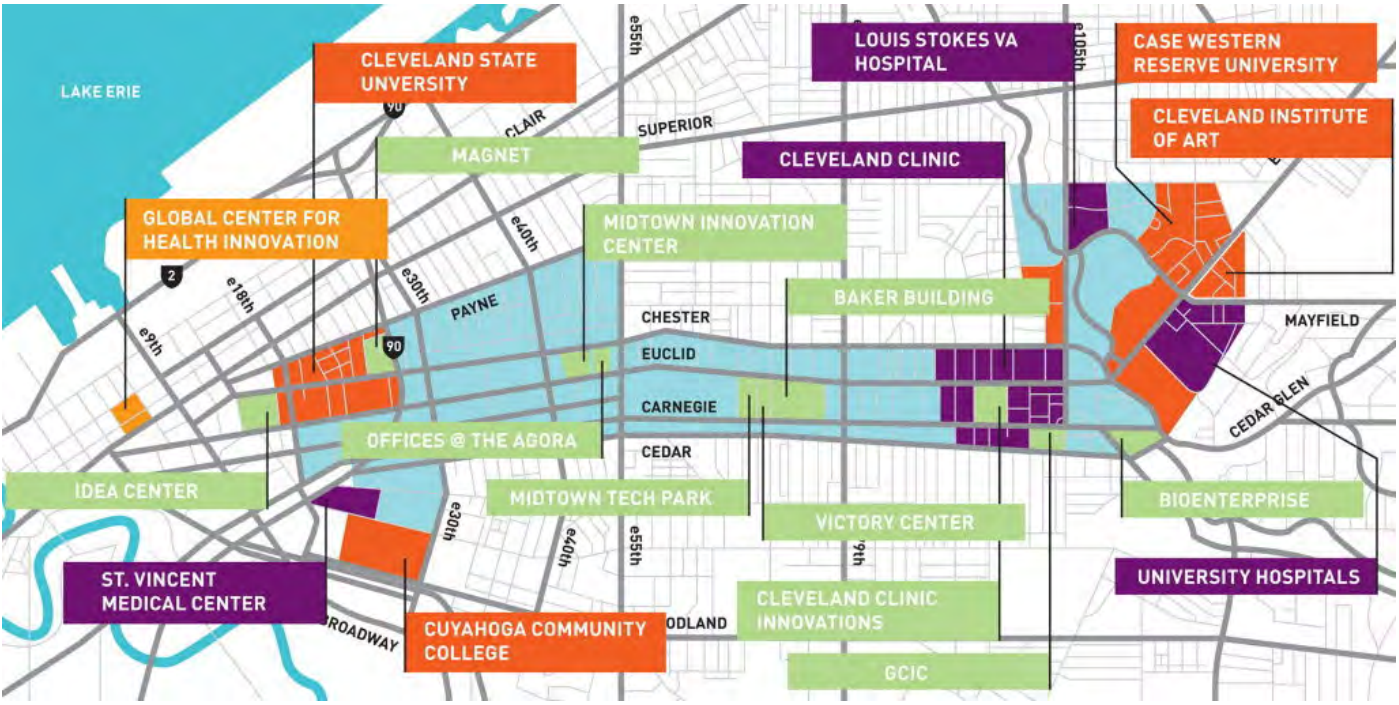
“Our most creative institutions, firms and workers crave proximity so that ideas and knowledge can be transferred more quickly and seamlessly,” explains Bruce Katz, founding director of the Brookings Institution’s Metropolitan Policy Program, and co-author of The Rise of Innovation Districts. “Our open innovation economy rewards collaboration, transforming how buildings and entire districts are designed and spatially arrayed.”

The fast-growing number of innovation districts are evolving as a new option for collaborative breakout spaces where visiting delegates can meet with local business and academic influencers. Meaning, the traditional convention center package is now expanding to encompass more of the downtown core, encompassing a wider swath of innovative businesses and university campuses to help disperse attendees throughout more parts of the city.

In effect, innovation districts are the physical manifestation of many government strategies today toward driving innovation in advanced industries to spur long-term economic growth and create competitive advantage in the war for high-value STEM jobs. It’s industrial placemaking for next-gen professionals. Equally important, innovation districts offer a proven way for both first- and second-tier markets to reposition their destination brands as hubs of innovation.

“It’s a very powerful thing to have a conference in an innovation district, or ‘precinct,’ as we call them,” says professor Deborah Edwards at the University of Technology Sydney. “I think London has shown this exceptionally well with their London Tech Week. That was a specific sector that the local and national government wanted to develop, within a specific environment in London’s technology district where there’s a vital community supporting that sector.”

5.1 CLEVELAND'S HEALTH TECH CORRIDOR CONNECTS THE CITY'S MEDICAL LEADERS WITH THE WORLD'S BUSINESS LEADERS



Cleveland's Health Tech Corridor is shaded in light blue.

Skift Take

Few cities in America have integrated their convention center district, academic institutions, scientific research labs, and local business community together better than Cleveland to attract high-value conventions in a specific sector.

Not many cities in the world can deliver as innovative a platform for medical meetings as Cleveland, because of the way the healthcare companies, scientific research institutions, startup community, convention facility infrastructure, and venture capital companies are so well integrated.

Adjacent to the downtown Huntington Convention Center of Cleveland, the $465 million Global Center for Health Innovation is a gathering space for the world's leading medical and health tech organizations. Three miles inland, the famous Cleveland Clinic, Case Western Reserve University, Louis Stokes VA Medical Center, and University Hospitals form a cluster of medical research facilities known as "University Circle." And joining the two knowledge sector hubs, the fast-growing Health Tech Corridor is a blossoming innovation district attracting leading medical tech companies at the nexus of the city's innovation economy.

The result of that connectivity has positioned Cleveland as one of the Midwest's medical meetings capitals. In fact, in summer 2016, the city was rebranded as "The Medical Capital" by BioEnterprise, which is a non-profit biomedical company that helps companies in biotechnology, health IT, and medical devices raise funding to expand operations. At TheMedicalCapital.com website, healthcare industry convention planners have access to the many partners behind the platform, including Cleveland Clinic and Case Western.

"About 43 percent of our overall book of business in the Huntington Convention Center is healthcare and medical, which is a high number due to the advantage of having the Global Center located adjacent to the convention center," says Dave Johnson, director of communications at the Huntington Convention Center. "Medical industry meeting planners are particularly interested in the Global Center because it offers unique sponsorship and partnership opportunities with more than 45 companies and organizations based there, as well as an outstanding group of potential speakers for educational and breakout sessions."

> "THE HEALTH TECH CORRIDOR ALLOWS US TO OFFER MEETING PLANNERS THESE INCREDIBLE OPPORTUNITIES FOR CONNECTION.... THERE ARE TIMES WHEN THAT OPPORTUNITY CAN BE THE DIFFERENCE MAKER IN DECIDING TO HOST A MEDICAL-RELATED MEETING OR CONVENTION HERE."
>
> — DAVID GILBERT, PRESIDENT AND CEO, DESTINATION CLEVELAND

Johnson adds that the economic impact of the convention center and Global Center on the entire Northeast Ohio region includes more than $100 million in "new money" injected into the region, driving new job creation, and international media attention focusing on Cleveland's revitalization and strengths in healthcare and device manufacturing.

One of the most interesting developments of late in Cleveland is the growth of the Health Tech Corridor (HTC) between the convention and medical districts. Anchored by the Midtown Innovation Center, the corridor is attracting a high number of medical companies moving into the area, so it provides another portal for planners to access local innovation, and it's driving economic development in underserved neighborhoods nearby.

"The interesting thing about the Health Tech Corridor is the nature of collaboration it's created," says Jeff Epstein, director of the HTC. "When you link all of the assets, it's really fascinating because this package is creating a holistic laboratory of amazing innovation."

Medical conferences play a big part in driving Cleveland's growth because visiting business leaders want to plug into Cleveland's innovation economy, which everyone in the local health tech industry wants to make as accessible as possible. CEOs operating in the HTC say the district is really an expertise connector designed to bring visiting convention delegates together with local healthcare leaders.

"Doctors will ask me, 'Can you give me a behind-the-scenes tour of the Cleveland Clinic?'" says Jake Orville, CEO of Cleveland HeartLab, which is a medical device manufacturer based in the HTC. "And I'll say, 'Sure, of course.' I mean, if you go to Boston, who would you even ask for a behind-the-scenes tour of Harvard Partners or Brigham? Here it's just easy. We have a bit of a chip on our shoulder because we want to prove we can compete with any city in the world when it comes to medical innovation."

According to David Gilbert, president and CEO of Destination Cleveland, there's been a marked shift in the last few years where more planners are asking for those kind of introductions, which the convention bureau is helping facilitate in growing numbers. He cites how Cleveland's destination brand reputation has successfully transcended beyond that of a "flyover city" because of the volume of convention business growing year-over-year.

"Our research shows that there is an enormously wide gap in perception among those who have visited Cleveland versus those who have never visited," explains Gilbert. "Now we have the Corridor where developers are building this whole new tech quarter area, building numerous headquarters and incubation innovation spaces, particularly related to healthcare, IT, and medical device companies. And so that helps elevate Cleveland's reputation in medical innovation circles as a hub for medical innovation."

Also, in terms of site selection for convention breakouts, the HTC provides meeting planners with a new inventory of experiences hardwired into Cleveland's innovation economy.

"The Health Tech Corridor allows us to offer meeting planners these incredible opportunities for connection, for tours, for people to see some of these spaces themselves," says Gilbert. "And there are times when that opportunity can be the difference maker in deciding to host a medical-related meeting or convention here."

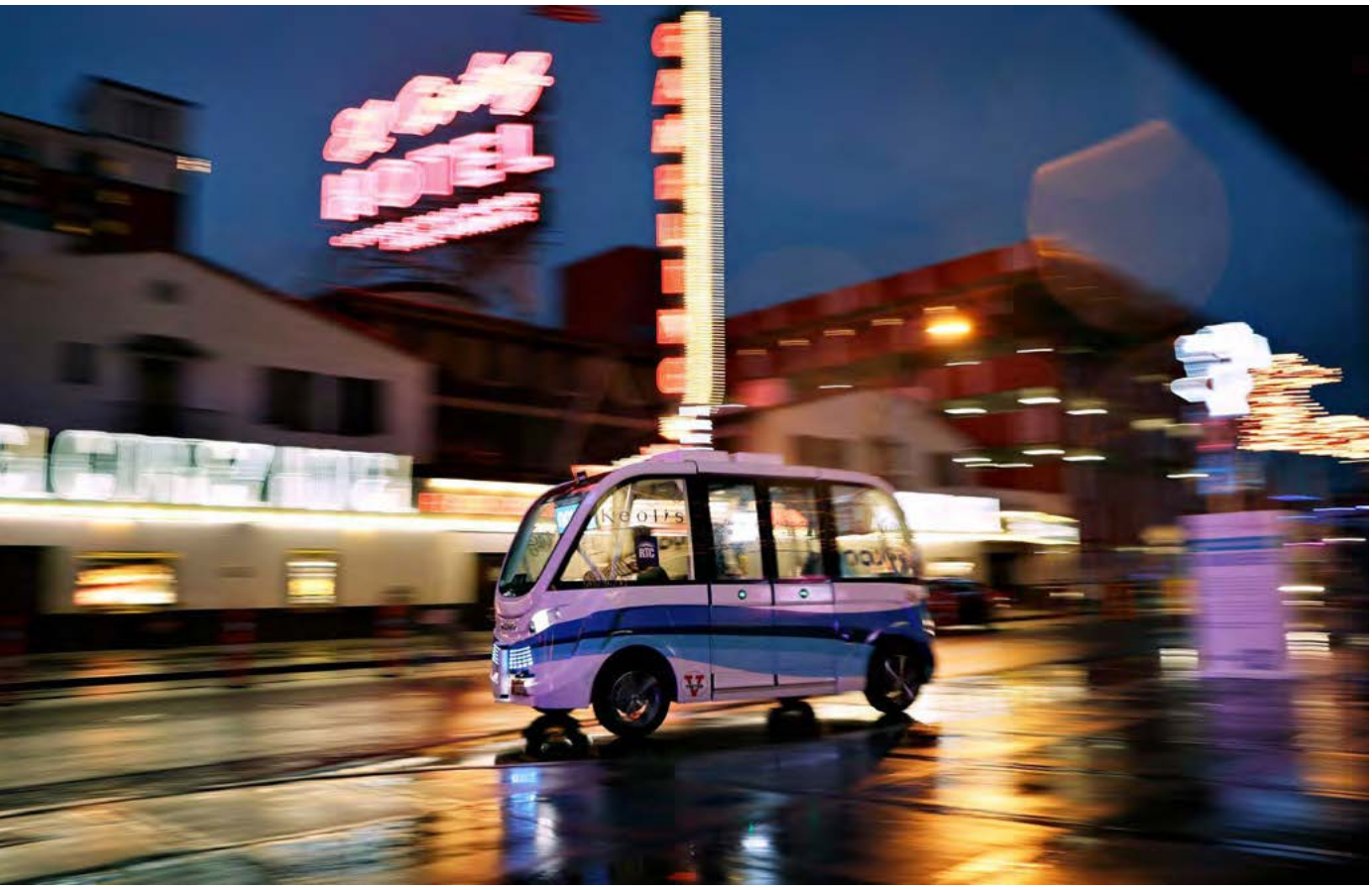
Aram Nerpouni, president and CEO of BioEnterprise, adds that the HTC is now driving economic development throughout the neighboring communities located between University Circle and the convention district.

"The Corridor is really creating a very specific connection between those two pieces, and we're starting to see an exponential growth in the number of companies and the number of buildings that are showing up with all these young companies moving in," he says. "Now we're trying to make sure we're creating better connectivity to the neighborhoods around that."

Nerpouni, like so many other economic development influencers across the U.S., stresses that inclusivity is an important part of the city's strategic plan.

"That's a big part of this evolution," he says. "So not only are we spinning out young companies that grow rapidly and create these very high-paying jobs, but now we want to make sure that we're connecting that growth into the surrounding communities, so that everyone's seeing some benefit from the amazing innovation and wealth creation in Cleveland."

5.2 LAS VEGAS TECH AND MEDICAL MEETINGS SUPPORT THE DEVELOPMENT OF NEW INNOVATION HUBS



The Paris-based Nayva company tested its self-driving shuttle in Las Vegas in January 2017.

Skift Take

Las Vegas is a prime example of how a city has pivoted its business brand by positioning itself as a hub of tech innovation based on its roster of conventions. The repositioning of the urban core as the "Las Vegas Innovation District" is also helping strengthen the attractiveness of the region to high-value sectors.

The Las Vegas Convention & Visitors Authority (LVCVA), the City of Las Vegas, and the Las Vegas Global Economic Alliance (LVGEA) have strived to diversify the city's tourism economy to better weather market disruptions. The city leaders are especially targeting technology and medical conventions to motivate companies in those sectors to establish footprints in Southern Nevada, create jobs, and improve the region's quality of living. The CES technology conference in January, other tech events hosted by companies ranging from Amazon to HP, and all of the high-profile medical conventions throughout the rest of the year are some of the city's highest priorities to nurture long-term economic growth.

Together, the LVCVA and LVGEA, along with multiple universities and private business development organizations, have produced strategic policy frameworks that outline collaborative efforts to boost the tech and medical sectors in Las Vegas. Those plans include directives to seek out partnerships with companies visiting the city for conventions that can potentially provide innovative strategies to improve the transportation infrastructure, develop smart city technologies, and bring more healthcare professionals and health tech companies to the region, among many other relationship-building tactics.

"Our role is growing in how we provide connections between our medical and technology conferences, and all of the exhibitors that they have coming in, with the local stakeholders who are most relevant to those industries," explains Cathy Tull, CMO of the LVCVA. "We now have a bigger stake in making sure that all of those economic development meetings in Las Vegas are taking place across our networks."

That process begins with long-term strategic planning. In December 2015, for example, the Regional Transportation Commission of Southern Nevada (RTC) released the giant 2,370-page "Transportation Investment Business Plan." The document states: "Tourism and resident growth will overwhelm the existing capacity of Las Vegas' transportation infrastructure and greatly affect the future economic health of Southern Nevada." The TIBP concludes that the city's current infrastructure will reach a breaking point within the next decade, placing at risk the Core Area Economy (aka, the Las Vegas Strip), which supports 37 percent of all jobs in the region, $50 billion in economic activity, and $1.5 billion in state and local taxes.

> "WE NOW HAVE A BIGGER STAKE IN MAKING SURE THAT ALL OF THOSE ECONOMIC DEVELOPMENT MEETINGS IN LAS VEGAS ARE TAKING PLACE ACROSS OUR NETWORKS."
>
> — CATHY TULL, CMO, LAS VEGAS CONVENTION & VISITORS AUTHORITY

Therefore, the state and local governments want autonomous vehicles and delivery drones in the city, sooner than later. Meanwhile, CES is the world's largest showcase of smart car and drone technology, taking place in Las Vegas, so the LVCVA and LVGEA are tapping into that tech innovation to develop new partnerships with the city.

For example, directly following CES 2017, the first-ever driverless shuttles on U.S. public roads started ferrying passengers around downtown Las Vegas. The launch is the result of a partnership between the Paris-based Nayva electric shuttle manufacturer, the Keolis fleet logistics provider, and the City of Las Vegas. In addition, Phoenix-based Local Motors is launching its driverless, 3D-printed Olli shuttle with IBM Watson AI connectivity in Las Vegas in late 2017. And, the pending opening of the Henderson Unmanned Vehicle Range (HUVR) next to Nevada State College is attracting drone manufacturing and drone delivery logistics companies to set up shop in Las Vegas.

"Tech events like CES have really benefited the community in that they're bringing those innovative companies to town, and when they see what they can do here, then they start building relationships," says Tull. "When companies are coming to Las Vegas, they're coming with new technologies and new ideas and having new conversations, but that requires a lot of collaboration on our side. So you can draw those linkages between conventions — where business groups are coming to Las Vegas and being exposed to the city — to our elected officials and economic development agencies that are also helping promote that piece of the pie."

The Medical Meetings Segment

Another high-priority sector, the global medical tourism market is expected to grow 15.7 percent on average annually through 2022, according to the April 2016 report, "World Medical Tourism Market — Opportunities and Forecasts, 2014-2022," produced by Allied Market Research. The report explains: "The major factors that boost market growth include affordability, availability, and accessibility of superior quality healthcare services with healthy support and assistance from tourism departments and local governments."

Las Vegas HEALS is a membership-based organization set up like a chamber of commerce, representing more than 34,000 healthcare professionals who share a mandate to improve the level of healthcare in Southern Nevada and strengthen the medical tourism infrastructure. In 2014, the group published the "Las Vegas Regional Strategic Plan for Medical & Wellness Tourism," supported by the LVCVA, LVGEA, and the University of Nevada Las Vegas (UNLV). Part of that plan includes strategies to better leverage the volume of convention business in the city related to healthcare.

"We need to take advantage of this flow of convention delegates that comes into Las Vegas, and demographically profile these folks to understand who they are," says Doug Geinzer, CEO of Las Vegas HEALS. "So we need to align with the meeting planners to identify their organizations and their practitioners visiting here for those meetings."

> "WE NEED TO TAKE ADVANTAGE OF THIS FLOW OF CONVENTION DELEGATES THAT COMES INTO LAS VEGAS, AND DEMOGRAPHICALLY PROFILE THESE FOLKS TO UNDERSTAND WHO THEY ARE."
>
> — DOUG GEINZER, CEO, LAS VEGAS HEALS

However, Geinzer continues, that's only half the equation. He says medical tourism also drives long-term economic impact throughout the local community.

"We also talk a lot to the planners' target audiences, because when conventions come to Las Vegas, the local community now has access to continuing education opportunities that they would not have otherwise," Geinzer says. "In the medical space, continuing education is huge. Everybody needs to get their CME's, and a lot of those continuing education opportunities are tied to a professional association conference."

The Las Vegas Innovation/Medical Districts

The growing push in Las Vegas to strengthen the medical and technology sectors inspired the City of Las Vegas in 2016 to announce the development of the Las Vegas Innovation District. Encompassing the redeveloping downtown core and the Las Vegas Arts District, the area is being designed as "a center for testing groundbreaking technology in the areas of alternative energy, citizen participation, transportation, and social infrastructure. It is also a proving ground for collaborative efforts between the city and its new technology partners."

An example of that, Audi chose Las Vegas leading up to CES 2017 to test out its new "Vehicle-to-Infrastructure" (V2I) technology, where Internet of Things (IoT) systems in the cars communicate with IoT devices throughout the city to make intelligent predictions about traffic patterns.

"So when you look at things like the Audi test, they could have done that anywhere, but they chose Las Vegas," says Tull. "They understand how we work together. They see how things are linked here. Again, it's another opportunity to expose business leaders who are here during conferences to what the Las Vegas environment has to offer."

The Las Vegas Innovation District is directly adjacent to the Las Vegas Medical District where the new UNLV School of Medicine is opening in 2017. The city has invested more than $36 million into the medical district's infrastructure in the last four years, and it is scheduled to inject another $97 million in 2018 and beyond. By 2030, the medical school is projected to have an economic impact of $1.2 billion, according to a December 2013 report by consulting firm Tripp Umbach.

There's also another significant long-term economic impact in terms of revitalizing the downtown core and driving new business development. The medical and innovation districts are located in two Las Vegas neighborhoods that fell into serious neglect in the late 20th century, so their redevelopment is paramount to diversify the city's economic base beyond the Strip.

Tull says that all of this urban innovation is proving the validity of the collaborative efforts between the City of Las Vegas, LVCVA, and LVGEA. She emphasizes that the consequences of the agencies' actions are greater than the sum of their parts to drive long-term economic growth.

"We need to continue to align ourselves with economic development, and really explain the benefits to local politicians, by showing that not only is there economic impact in regards to bringing more conventions to Las Vegas, there's economic impact that trickles throughout the community here," she explains.

"It's really about exposing new industries and technology and platforms to our local elected officials, and also those in economic development, so that we can all have that conversation around: 'How do you get a drone company to relocate to Las Vegas?'"

5.3 THE SAN DIEGO TOURISM AUTHORITY IS HELPING BUILD THE DESTINATION'S BUSINESS BRAND AROUND TECH INDUSTRY



San Diego collaborated with *National Geographic* to highlight the city's tech sector.

Skift Take

San Diego is competing against two megawatt meeting cities — L.A. and San Francisco — and its reputation has always been firmly entrenched in leisure tourism. So the San Diego Tourism Authority is investing in retooling that image to show how the city is also a global leader in biotech, cleantech, and urban livability, and it's relying heavily on conventions to accomplish that.

In 2015, *National Geographic* profiled San Diego as one of nine global smart cities — ranked on talent, tolerance, and technology — in an hour-long documentary distributed to 247 million households in more than 60 countries. The San Diego Tourism Authority was instrumental in developing the content to position San Diego as a booming innovation capital and leader in advanced industries ranging from life sciences to cleantech to maritime logistics.

"We drove it and we figured out how to pay for it," says Joe Terzi, president and CEO of the San Diego Tourism Authority. "The content is all about the business side of San Diego, but then we also included the arts and sciences side, and the unique educational institutions we have here."

The City of San Diego and the San Diego Regional Economic Development Corporation (SDREDC) also promoted the film to their audiences. Leading up to the show's launch, San Diego Mayor Kevin L. Faulconer said, "We've talked a lot about how San Diego is a place of innovation and opportunities, and the world is taking notice."

> "WE ARE VERY INVOLVED IN HELPING THE INNOVATION ECONOMY GROW BY BRINGING CONVENTIONS HERE, BECAUSE WE KNOW THEY BECOME A STRONG FEEDER FOR OUR INDUSTRIES."
>
> — JOE TERZI, PRESIDENT AND CEO, SAN DIEGO TOURISM AUTHORITY

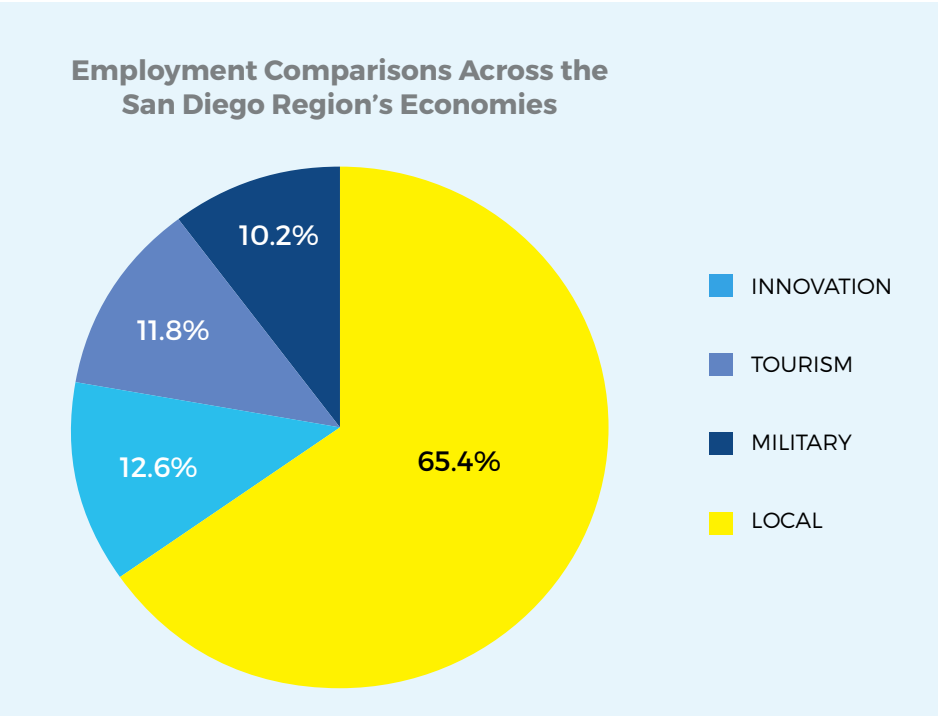
The *National Geographic* documentary builds on an earlier project produced by the SDREDC and SDTA called: "They Came Here." It highlights business leaders in San Diego who relocated to the city to launch successful new tech and medical companies, such as Jonas Salk, who opened The Salk Institute for Biological Studies in La Jolla, and Dr. Ivor Royston, who founded the first biotech companies in San Diego.

The collaboration between San Diego's destination marketing and economic development organizations, with the full support of the mayor, have helped elevate the city onto the world stage of advanced healthcare research. However, San Diego doesn't have the volume of large corporate headquarters like nearby Los Angeles and San Francisco, so that's forcing San Diego to capitalize on conventions to bring those corporate leaders to the city's doorstep.

"We're at a bit of a disadvantage because we're not a significant base for corporate America, so we rely heavily on large meetings and conventions to meet with their top executives," says Terzi. "We are very involved in helping the innovation economy grow by bringing conventions here, because we know they become a strong feeder for our industries."

The biggest industry in San Diego's innovation economy is life sciences, with 65 percent of all VC money in the city pumped into the biotech sector and big pharma. According to the "United States Life Sciences Report 2016," it reads: "Life sciences employment [in San Diego] grew at a faster rate than total private employment, 5.6 percent compared to 2.7 percent, respectively. The notable life sciences cluster is partly attributable to some of the world's largest biotech, pharmaceutical, and non-profit research institutes."

The BIO International Convention, which is the biotech industry's biggest annual gathering of business and research leaders, took place in San Diego in 2014, and it's returning in June 2017. The resulting exposure for the city has supported San Diego rise as one of the country's top three hubs for the life sciences sector. According to SDREDC figures, the region is home today to more than 1,100 life sciences companies and 80 research institutes employing over 50,000



The size of San Diego's innovation economy has surpassed the city's tourism economy

people in the biotech cluster, which accounts for more than $31.8 billion in total economic impact locally. Furthermore, the Biocom life science association is based in San Diego, working on behalf of more than 825 members to "drive public policy and accelerate the innovation ecosystem in San Diego."

With life sciences and the overall biotech industry well established in San Diego, Nikia Clarke, executive director of the SDREDC, and Erik Caldwell, economic development director for the City of San Diego, both say that their roles are now focused on expanding economic development throughout a wider breadth of the destination.

"Every time BIO comes to San Diego, everyone gets inundated with tours and requests, so one of our priorities is to get folks from the convention center out into the economy, so we can provide them with an understanding of the opportunities that are presented by the San Diego region," Clarke says. "We also want to facilitate more B2B experiences for the delegates."

To help accomplish that, the city is launching a new online platform this summer in time for BIO, which will be used for other conventions as well. It's going to be a portal for visiting attendees and exhibitors to explore companies and institutions prior to an event to help better connect visiting delegates with local industry colleagues in the area.

"All the assets, the relevant tours, and the trade services available in the region will all be there with additional information, and then delegates can reach out directly," explains Caldwell. "We'll facilitate on the back-end, streamlining where those requests go."

5.4 SAN FRANCISCO TRAVEL COLLABORATES WITH THE MAYOR'S OFFICE OF ECONOMIC AND WORKFORCE DEVELOPMENT TO SUPPORT THE CITY'S LONG-TERM GROWTH VISION



Salesforce's Dreamforce conference has a direct economic impact of $265 million during the event.

Skift Take

San Francisco Travel shows how convention bureaus are increasingly collaborating with their economic development colleagues to pool their resources to co-create new business development and branding opportunities, and they're often using conventions as launch pads.

While CVBs in the U.S. have long collaborated with their city's economic development organizations and local government leaders to drive their individual mandates for the collective good of the community, some cities are more effective than others when it comes to delivering results.

According to Joe D'Alessandro, president and CEO of San Francisco Travel, the benefits of strategic collaboration between convention bureaus and economic development agencies are best demonstrated by the long-term economic impacts of conventions in advanced industries. Nowhere is that more evident in North America than in the Bay Area.

"That type of collaboration has been on our radar for a long time because San Francisco is a global city, but a very small city at the same time, so it's really hard to separate the meetings industry from our general economic development," says D'Alessandro. "We're lucky because we have the industry sectors that are growing so fast, and that have a global presence, but we continually rely on meetings and conventions to help foster and encourage that growth."

In 2007, the San Francisco Mayor's Office of Economic and Workforce Development outlined the vision for the city's long-term growth in the report, "Sustaining Our Prosperity: The San Francisco Economic Strategy." The strategy framework focused on the cross-pollination and development of four key sectors to drive the city's growth: knowledge, experience, human resources, and infrastructure." (The visitor economy falls within the experience sector.)

> "IT'S REALLY HARD TO SEPARATE THE MEETINGS INDUSTRY FROM OUR GENERAL ECONOMIC DEVELOPMENT."
>
> — JOE D'ALESSANDRO, PRESIDENT AND CEO, SAN FRANCISCO TRAVEL

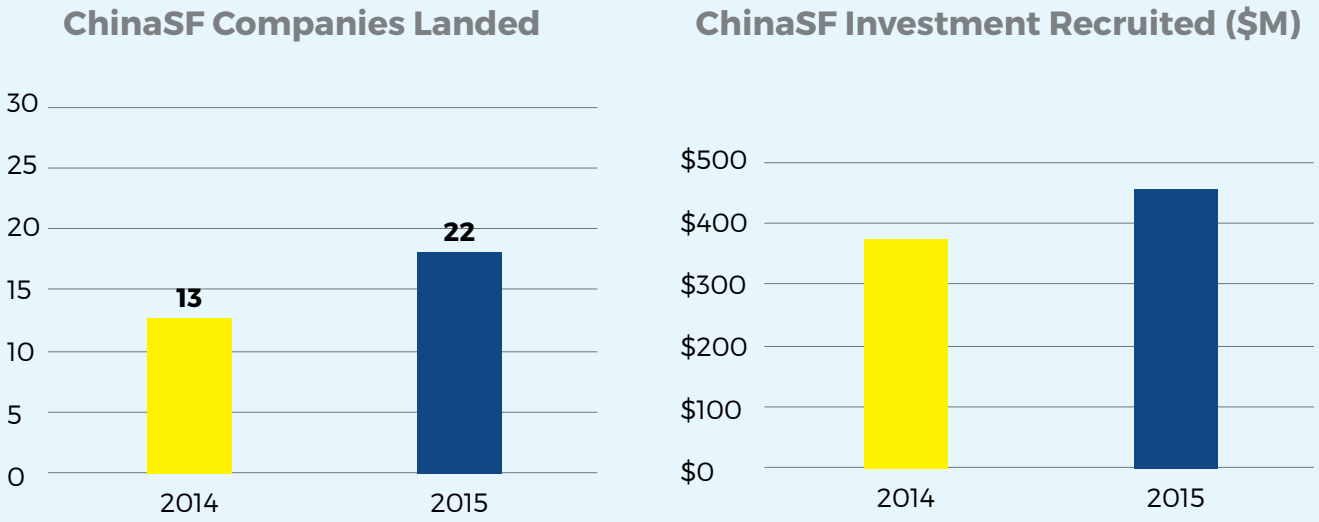
The report reads: "Of the four sectors, the experience and the knowledge sectors are especially important. Both of them have demonstrated a capacity for further growth over the long term, based on their growth trends in the past; and as the main components of the city's export base, their competitive performance will largely determine the trajectory of the entire San Francisco economy."

"It's really the experience sector and knowledge sector that we've collaborated with the most," D'Alessandro explains. He cites examples where the CVB has helped develop iconic conventions such as those hosted by Apple, Oracle, and Salesforce, which have helped define and differentiate San Francisco's business brand. "The experience sector, and that includes meetings, goes hand-in-hand with the knowledge sector, which reflects all of our high-tech industry that's such a strong player in the Bay Area economy."

Todd Rufo, director of the San Francisco Office of Economic & Workforce Development, says he and D'Alessandro have had a long and close-working relationship to develop advanced sectors in the city, going back to before those sectors almost even existed.

In 2008, for example, there were two companies developing research in life sciences. Today, there are more than 200. Rufo attributes part of that to events like the BIO International Convention, which took place in San Francisco in 2016.

"It was really synergistic when BIO decided to bring their conference back to San Francisco last year," Rufo explains. "It proved to be a successful model, because not only were they able to have an amazing conference in San Francisco, but they were able to have tons of business meetings with the companies and the research institutions in the Bay Area. It's the economic and workforce development strategy going hand-in-hand with the strategies and goals of the initiatives at San Francisco Travel."



ChinaSF continues to recruit more companies each year. From 2014 to 2015, ChinaSF recruited roughly 40% more companies to San Francisco, and brought in 22% more investment.

ChinaSF Initiative

The City of San Francisco's ChinaSF initiative is a prime example of a convention bureau and economic development agency collaborating to attract foreign investment. Since it began in 2008, ChinaSF has supported the expansion of more than 60 Chinese companies in San Francisco, and it has helped countless Bay Area-based companies make important business connections in China.

In 2015, ChinaSF recruited 22 new companies to San Francisco, attracting roughly $450 million of Chinese capital to projects such as the First and Mission development, led by Oceanwide Real Estate, which is a ChinaSF recruit. Building on that in January 2016, the City hosted the ContinuumSF Innovation & Credit Conference for over 400 attendees, with international speakers and panels discussing trends and best practices in cross-border investment, crowdfunding, healthcare innovation, real estate, and online payment security.

"We work closely with our partners, including SF Travel to help make sure we are getting these folks connected to the right people," says Rufo. "We have since expanded that model. ChinaSF was the first, but now we also have a LatinSF initiative to focus on Latin America and another focusing on Southeast Asia called SFAsia.

"We're fortunate because we have such a close relationship with SF Travel," Rufo continues. "We are all sort of in the same vein, really. Promoting travel is an economic and workforce development function in much the same way that our work is an economic and workforce development function."

5.5 ST. LOUIS AND THE CORTEX INNOVATION COMMUNITY ARE PIVOTING THE CITY'S BUSINESS BRAND IMAGE



The Brookings Institution ranked Cortex Innovation Community as one of the top 10 U.S. innovation districts.

Skift Take

St. Louis has one of the most robust startup communities in the Midwest, so the local CVB and innovation district are leveraging that by introducing convention attendees to local entrepreneurs inside a batch of incubator facilities near the convention center. The two organizations also partnered on the launch of a new innovation conference to give the city a fresh story to tell.

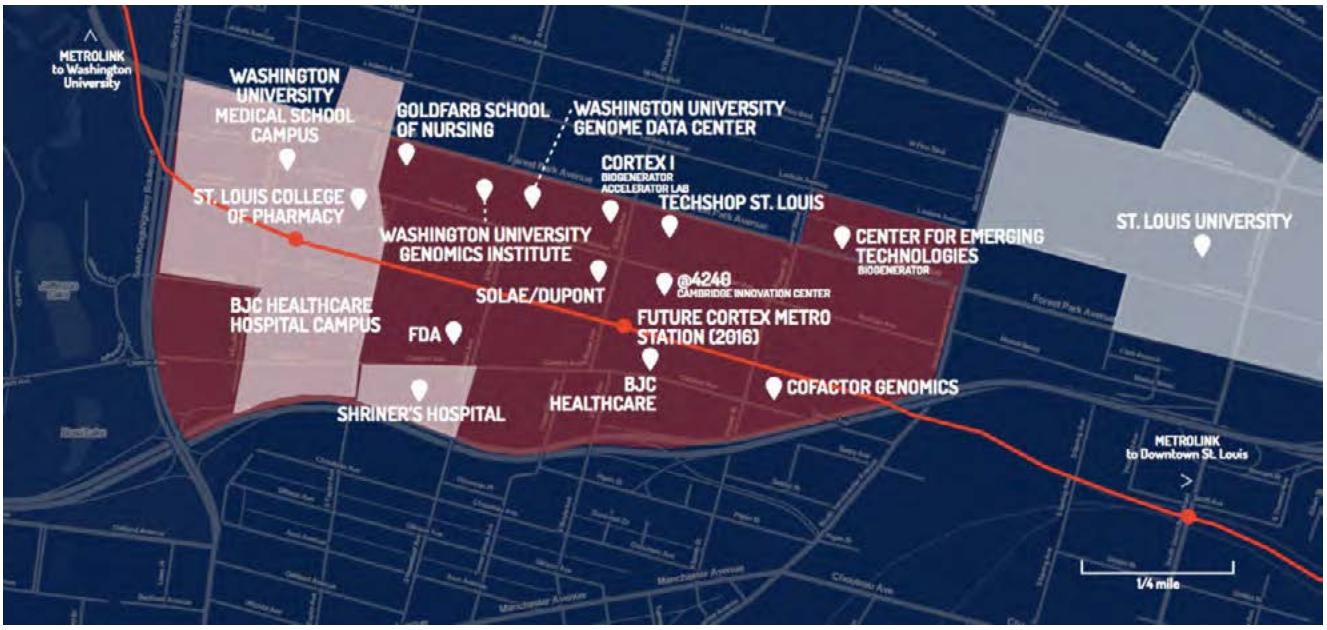
The Cortex Innovation Community in St. Louis illustrates the rise of innovation districts and their impact on a city's growth. Encompassing 200 acres of downtown St. Louis, Cortex was founded by the area universities and research facilities to help attract and support startup companies in biotech and life science, which has proven highly successful. Today, St. Louis ranks second in the U.S. for jobs in biotech and pharmaceuticals, and every year more than 2,800 students graduate from the local universities with a degree in plant or life sciences.

The Explore St. Louis convention bureau has been collaborating closely with Cortex to help pivot the city's reputation from a rust belt city to a brain belt city. For example, the public and private organizations collaborated in 2016 to launch the inaugural Murmuration Festival, with the tagline: "A Convergence of Art, Music, Science and Tech," bringing together the region's

knowledge industries and cultural community in a format based on Austin's popular South by Southwest conference.

According to Brian Hall, CMO of Explore St. Louis, events like Murmuration and the First Robotics competition, sponsored by the local Boeing headquarters, are helping shift the national perception of St. Louis as an emerging leader in advanced industries with a burgeoning creative mindset.

"Cortex and other innovative companies represent the replacement of the tired old narrative about St. Louis," says Hall. "They shine a light on everything that is positive and productive about our community. Especially when you look at the ethos of typical Millennials in our city, they've been quick to embrace the innovation movement. They want to connect with it because they realize this is about a new awakening in St. Louis."



Downtown St. Louis and the Cortex Innovation Community

Explore St. Louis is now using the Cortex Innovation Community more and more as an extension of the America's Center Convention Complex. In effect, the city itself is evolving into a multi-tiered series of meeting venues weaving organically throughout the urban core to drive economic development to a broader cross-section of community stakeholders.

For example, Cortex will be hosting sessions during the upcoming 6,000-attendee ACSESS association event, bringing together academic and scientific leaders in plant sciences.

"That benefits a lot of our communities in many ways," says Hall. "The Plant Science Foundation is based here so the international ACSESS conference raises our profile on a world stage, and that helps attract new investment into different parts of the city."

> “THE LIFESTYLE CHOICES OF TODAY’S INNOVATION WORKFORCE DEMANDS AN ENVIRONMENT THAT IS ACCESSIBLE, CRUNCHY, CONNECTED TO THE COMMUNITY, AND TALKING ABOUT THINGS THAT MATTER.”
>
> — DENNIS LOWER, PRESIDENT AND CEO, CORTEX INNOVATION COMMUNITY

Cortex is continuing to expand with new buildings and new tenants like Microsoft, which is relocating to the innovation district this year. Likewise, the new TechShop is a cool maker space that hosts events for visiting delegates who can use new technologies like 3D printing machines and laser cutters.

“We now have an opportunity to bring groups from the convention center to the Cortex Innovation Community for breakout sessions at places like Venture Cafe, @4240, or the Center for Emerging Technology,” explains Hall. “I’ve been in the destination marketing business for 30 years and I’ve never seen a level of collaboration between our economic development agencies and the private sector that we’ve experienced here in St. Louis. I think that it’s particularly instrumental for the effective brand positioning of a place in the meetings industry.”

Dennis Lower, president and CEO of Cortex Innovation Community, adds that the percentage of Millennials working within the Cortex district is about 60-65 percent, compared to 30 percent in the U.S. general population. Therefore, he says, the attraction of Cortex for meeting planners is just as much about the culture of the innovation district’s community as it is about the actual innovation.

“Innovation districts are not about buildings; they’re about programs and people and interactions, and to be successful, they have to be responsive to the people who work there,” says Lower. “The lifestyle choices of today’s innovation workforce demands an environment that is accessible, crunchy, connected to the community, and talking about things that matter.”

Meaning, the rise of innovation districts as meeting venues and gathering spaces also inspires an elevated focus on modern workplace culture across corporate America.

“For a lot of companies who establish a footprint in Cortex, or visit for a conference, the reason they do it is not just to access Millennial talent, but to help with the culture change that they know they have to go through,” explains Lower. “That’s a whole area where innovation districts are beginning to serve the larger business community in ways that we had not thought about before.”

5.6 ALBUQUERQUE'S NEW INNOVATION CENTRAL DISTRICT IS DESIGNED TO COMMERCIALIZE IDEAS



The Innovate ABQ facility anchors Albuquerque's new Innovation Central district.

Skift Take

Albuquerque has long been home to some of the country's most advanced space and science research labs. Now the city is investing heavily to reposition the city's brand around its new innovation district, which is designed to provide a creative and convenient place for local and visiting scientists and entrepreneurs to meet.

Gary Oppedahl, director of economic development for the City of Albuquerque, says there's a greater awareness today in New Mexico of how economic growth depends on a more intentional and strategic convergence between the city agencies overseeing meetings development and economic development.

"We're more conscious of how important it is to match up everything happening on the entrepreneurial and business development side with how we position Albuquerque for the acquisition of more conventions," Oppedahl says. "We see tourism, convention, and economic development as two sides of the same coin."

The City of Albuquerque is investing heavily in its new Innovation Central district, which connects the Albuquerque Convention Center and University of New Mexico (UNM). It's designed to be a gathering place for people working in the many scientific and space research companies located in the region, the growing number of tech startups moving into the city, the university's numerous research labs, and all of the visiting conference delegates working in advanced industry.

> "OUR INNOVATION DISTRICT IS DESIGNED TO CREATE COLLISIONS BETWEEN SMART AND CREATIVE PEOPLE IN DIFFERENT FIELDS OF MEDICINE, SCIENCE, AND ENGINEERING, WITH THE IDEA THAT YOU CAN COMMERCIALIZE IDEAS AT SOME POINT AND CREATE JOBS."
>
> — ALBUQUERQUE MAYOR RICHARD BERRY

Anchoring Innovation Central, the new $35 million Innovate ABQ facility will house UNM's Innovation Academy and residences for visiting scholars and entrepreneurs.

The city is also spending $29 million to upgrade the adjacent convention center and $39 million to create the One Central Entertainment District.

The end goal is to develop an innovation campus for conference attendees to engage with local thought leaders in a wide variety of professional and casual environments day and night, seven days a week.

"Our innovation district is designed to create collisions between smart and creative people in different fields of medicine, science, and engineering, with the idea that you can commercialize ideas at some point and create jobs," says Albuquerque Mayor Richard Berry. "That's an upward spiral in our community. So the conferences that we bring to Albuquerque do a lot more than put heads in beds. We know that matters, but this is about science, technology, enterprise, entrepreneurship, and creating a culture of innovation on par with almost anywhere in the world."

Oppedahl adds that his office and Visit Albuquerque are collaborating more closely than in recent years to create programming for visiting conference attendees that embeds them more strategically into their relevant local sectors in New Mexico.

"We have thought leaders guarding the nation's nuclear secrets, so we're putting together programs where people coming here for conventions can engage with someone who literally is a rocket scientist at one of the national labs," he explains. "People are not even aware of it, but we're on top of the biggest trends in industries like material sciences and directed energy."

To help make more people aware of that, the 160,000 square-foot Innovate ABQ building is positioned as an "entrepreneurial ecosystem," and the 155 two-bedroom residences on the top floors are designed to make the facility a work/live/play environment for visiting professionals.

According to UNM's "Innovate ABQ Development Framework" white paper:

> The City was our clear partner in the project. In the fall of 2013, the City's $2 million funding for Innovate ABQ was approved by voters, local financial institution Nusenda Credit Union pledged $3 million to the project, and the EDA grant was approved for $1.5 million. The County of Bernalillo came on board as well with a $1 million commitment. The UNM Regents voted unanimously to move forward with the purchase of the Central/Broadway site for an innovation center in downtown Albuquerque, with widespread testimonial support from representatives of the campus community including from the EDC. Innovate ABQ has been formed as a UNM-owned corporation, and in July 2014 the property was purchased. The Development Framework for Innovate ABQ was completed and a Request for Proposal was distributed to developers in April 2015.
>
> Today, the Innovate ABQ Inc. Board has entered into a due diligence agreement with the development group Signet Development, Goodman Realty Group and Dekker/Perich/Sabatini to develop the core site. Research and business districts that are designed to cultivate the idea of an innovation ecosystem that moves freely, is highly diverse and rapidly connects and collaborates from the bottom up is the future basis for innovation economies. Innovation is driven by people and the ability of people to share and develop ideas together. Innovate ABQ integrates the community because it's designed to be multi-dimensional, interconnected, collaborative, and near its technology generating pipeline (UNM). When these elements come together, the community also benefits from economic growth. For UNM and the New Mexico community, this economic engagement effort to build a research and innovation district brings all the pieces together — innovation, talent and place.

With Innovate ABQ anchoring the Innovation Central district, Visit Albuquerque now has an exciting new meetings destination anchor to complement the convention center for groups wanting to plug into a turn-key knowledge hub.

"There's going to be a caliber of innovative thinking taking place here that's really going to resonate with meeting planners," says Tania Armenta, president and CEO of Visit Albuquerque. "We see Innovation Central as a definite win, and we've been heavily promoting it to planners."

But is this level of collaboration between the convention bureau and economic development agency something that is evolving as a new trend? Is there a strategic shift presently taking place here?

"I don't want to say that we haven't collaborated with economic development in the past, because we've always understood our anchor institutions and our strategic alliances, but I definitely think it's a different conversation today than used to occur," says Armenta. "Absolutely, there's the recognition from both parties, and an additional respect level, for the roles that meetings and conventions can play on our sustained growth when we work together to position the city as a hub of innovation in our key sectors."

> "THERE'S GOING TO BE A CALIBER OF INNOVATIVE THINKING TAKING PLACE HERE THAT'S REALLY GOING TO RESONATE WITH MEETING PLANNERS."
>
> — TANIA ARMENTA, PRESIDENT AND CEO, VISIT ALBUQUERQUE

6. HOW GLOBAL CVBS AND ASSOCIATIONS ARE CO-CREATING THEIR LEGACY IMPACTS



Dubai Design District

Skift Take

Convention bureaus are developing strategies to help international associations define their long-term vision and legacy impacts.

The BestCities Global Alliance is a partnership of 12 convention bureaus worldwide that share best practices for hosting international association conventions. In November 2016, the bureaus gathered in Dubai for the inaugural BestCities Global Forum. The theme of the event — "From Success to Significance for Events and Destinations" — examined how CVBs can provide consultative assistance to help associations deliver on their long-term visions, on an ongoing basis, versus just providing one-off logistics support.

Paul Vallee, CEO of BestCities Global Alliance, says that international association executives often feel their host convention destinations focus primarily on securing the event and delivering business to their hotels, but when it's over, there's a sense that the two parties aren't going to see each other again for potentially a decade or more. So there's rarely any subsequent communication between the association and CVB after the fact.

"Not that destinations just sort of say they're going to wash their hands and they're done, but they are kind of moving on to the next thing," says Vallee. "So, from an alliance standpoint, because we're a network of 12 cities, we started discussing when associations hold a congress, we can keep that bond with that association from city to city to city. And maybe, we can find a way that we can work with them to help them develop their legacies on a longer term basis."

The first step in the process is creating consensus between the association and CVB leaders about what the purpose of the association is, and how that is evolving in today's age of technology and digital platform disruption. There are growing challenges around how associations engage their membership in the digital economy, and how they deliver education and networking opportunities offline at conventions and online pre/post-event.

CVBs can enhance those face-to-face and virtual engagement opportunities by bringing a wider breadth of the destination to play a role in convention programming and communications, which also expands the legacy impacts for both the destination and the event.

"I think, in many respects, this notion about legacy impacts is relatively new, especially from the destination standpoint," says Vallee. "Part of this is the evolution of DMOs taking on a wider role as association developers. DMOs and CVBs are generally becoming much more well informed, and providing guidance for associations beyond the traditional practical support. From our standpoint, it's about building those local connections into a sort of global network."

One of the key takeaways for Vallee coming out of the BestCities Global Forum was, for associations who meet on an annual basis, the only way to build a legacy is by having a more long-term perspective around their overarching goals. He says that will also require BestCities' member bureaus to expand their mindset to think more long-term, as well.

As an example, a medical association's goal might be to develop new research in a specific area of medical technology. Therefore, a convention bureau wishing to attract that association, should build a stronger relationship with its university's medical school, and it should build on the past successes of any associations in a related field that have previously convened in the destination, or any partner destinations. That's not a new concept, but it's not well codified at most bureaus.

"You can only build event legacies when you're thinking many years in advance, so whether that legacy is to influence public policy, or to enhance funding for research, or to simply build awareness, these things aren't done overnight," Vallee says. "I also think one of the things that's becoming more important for us and our partners is making this notion of legacy more practical."

Dubai Business Events was the host bureau for the BestCities Global Forum. Steen Jakobsen, director of Dubai Business Events, says the relationship between convention bureaus and associations can be much more mutually beneficial. Bureaus can bring their destination partners together to provide knowledge that will help associations engage their members in the region better, he says, and associations can help bureaus build their destinations' innovation economies.

"Associations have told us, 'You can provide value to us if you help us develop and plan programs that allow us to create stronger legacies around our organizations' events,'" Jakobsen explains. "The

way that we've approached our business development in BestCities over the years has primarily been of a transactional character. We've found that if we are to provide real value to organizers of association conferences, then it needs to go beyond just those transactional conversations."

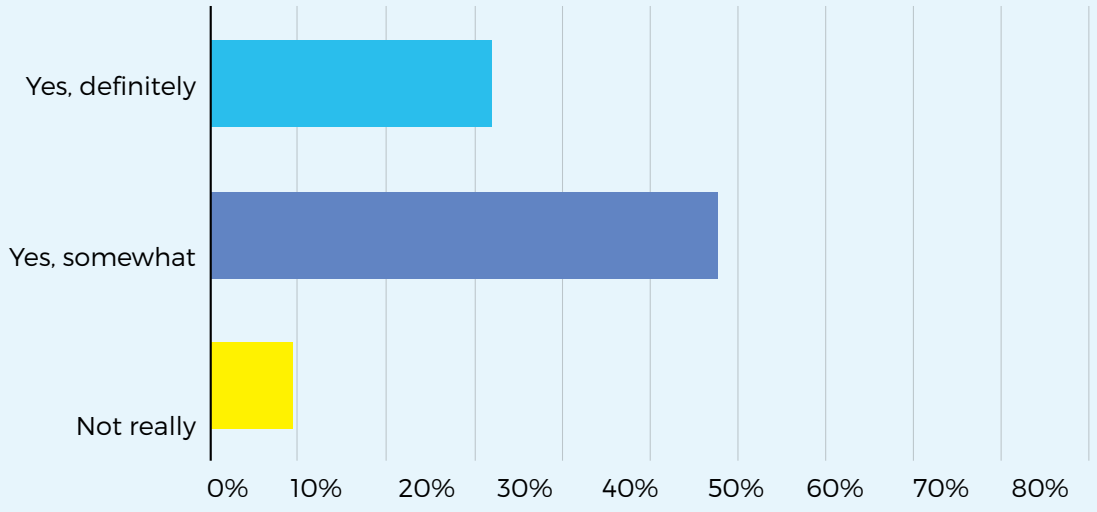
Dubai provides a good example of a destination striving to build a strong legacy for a major event for both visitors and locals, by investing heavily to diversify its economy and position itself as a regional hub of innovation in advanced industries. That's illustrated by the theme of Expo Dubai 2020: "Connecting Minds, Creating the Future," organized around the pillars of "opportunity, mobility, and sustainability." In effect, one event is being designed to inform the development of the entire Middle East.

"Dubai is now at the stage where it wants to transition into a full knowledge economy," says Jakobsen. "That transition is driven by a number of different initiatives and policies spearheaded by the government. In that context, Expo is really seen as an accelerator of that transformation into a knowledge economy. It represents a shift from being a more industrial society, which is focused around trade, to one where we're moving full steam ahead into becoming a knowledge society."

6.1 SKIFT TRENDS RESEARCH: HOW ASSOCIATIONS ARE DEVELOPING THEIR LEGACY IMPACTS

Skift and BestCities polled a select group of 40 senior executives leading international associations to explore how they're defining their long-term legacy. A full 90 percent of respondents confirmed this is an important, or somewhat important, subject for them.

QUESTION #1: Is your association focusing significantly on the long-term legacy impacts of your events, and how they drive the development of your host destinations and future growth of your organization?



A second poll question asked respondents to rate the degree of importance they place on a series of motivating factors driving associations to define their legacy impacts. A third question (next page) asked respondents how they're shifting the design of their conventions to act on their legacy vision.

QUESTION #2: Rank the following in importance as each relates to motivating your organization to focus on the long-term legacy impact of your events.

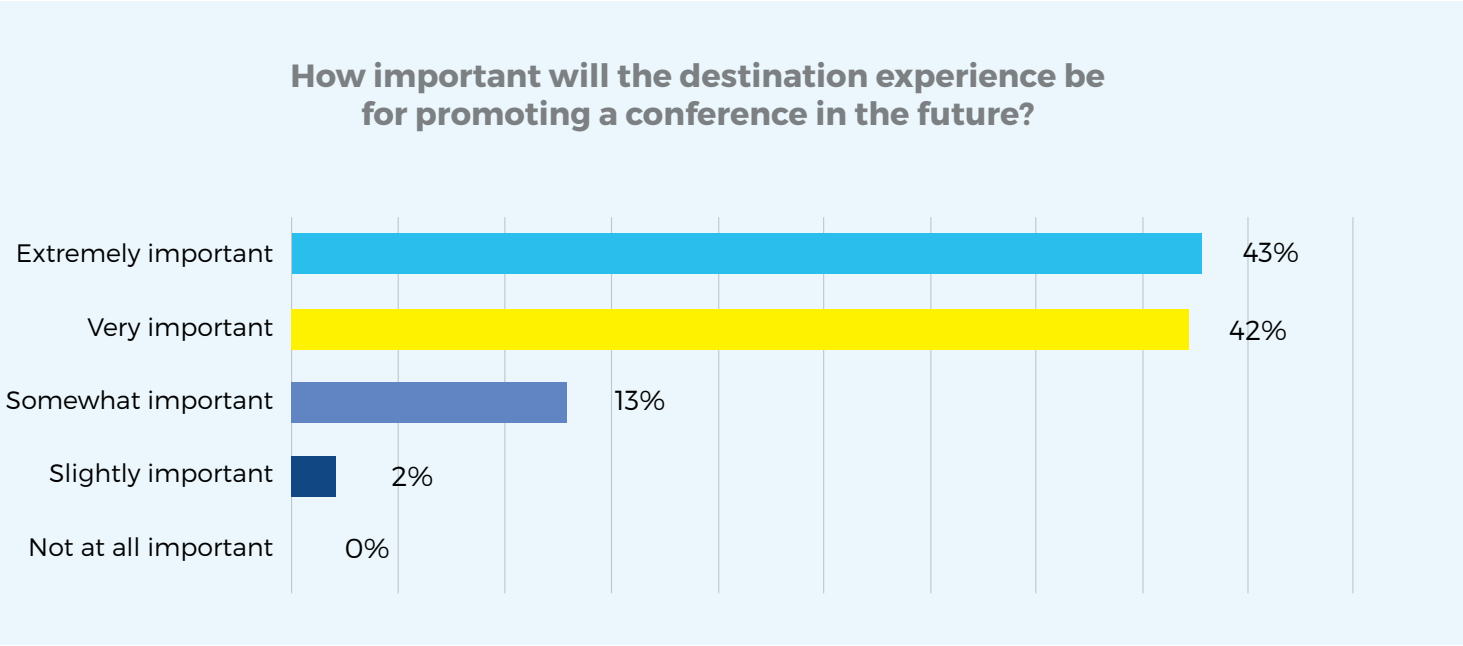
Each is aligned with one or more of BestCities' legacy currencies: Financial, Physical, Educational, Emotional, and Social.

	Critical	Important	Nice to have	Negligible
Build a global network of collaborators to share knowledge more effectively within our industry	61%	29%	10%	0%
Support the development of new academic and scientific research	61%	26%	13%	0%
Establish a global network of influencers and thought leaders in our industry	58%	32%	10%	0%
Promote our academic and scientific community to a global audience	58%	29%	9%	4%
Build more effectively on the learning (knowledge, experience, and best practices) taken from one conference to the next	52%	39%	3%	6%
Provide opportunities for young professionals entering our industry	48%	39%	13%	0%
Improve the depth of engagement with our members	45%	45%	10%	0%
Help strengthen or pivot our organization's brand as a catalyst for innovation	39%	42%	19%	0%
Increase opportunities for cultural exchange and knowledge sharing among different audiences	39%	42%	19%	0%
Help raise long-lasting awareness of issues of importance to our organization among the general public	39%	42%	6%	13%
Help define and evaluate our organization's long-term vision	36%	52%	6%	6%
Influence public policy decisions at the global national and local level	36%	36%	19%	10%
Be a more significant and recognized participant driving innovation in our industry	32%	42%	23%	3%
Help attract outside knowledge, investment, and talent to our industry	26%	52%	19%	3%
Desire to give back to business and academic communities in the host destination	26%	45%	23%	6%
Develop business relationships between our members and the thought leaders that we engage with in host destinations	23%	48%	23%	6%
Support the development of new facilities and/or infrastructure aligned with our organization's mandate	16%	48%	13%	23%
Forge stronger networks of local businesses and thought leaders within the host destination	13%	48%	29%	10%
Help drive outside investment and talent into the host destination	9%	39%	39%	13%

QUESTION #3: How are you changing the design of your conventions to create a stronger legacy impact for both your host destinations and your organization?

#	Responses
1	Networking with local and international participants. Pre/post congress educational tours hosted by locals.
2	Including more awareness of local businesses that are members and working with media outlets to show the impact of bringing business leaders to town that could lead to having them invest in the area.
3	Raising leadership awareness of the opportunities and responsibility of initiatives at local level.
4	Smaller, more frequent conferences are being considered.
5	More and more involving local leaders and stakeholders in the preparation of the scientific program, as well as in the organization of the event, carefully taking into account the regional characteristics and expectations.
6	We have a few initiatives where we work with our local hosts to figure out the greatest need in the local market and try to address this. This includes free workshops to local businesses, site visits to social organizations, volunteer efforts, and promotion of local activities and initiatives at our conferences.
7	Providing scholarships to our investigators (members), and fellowships to attend meetings.
8	By taking sub-meetings and integrating all together into one main area to allow for cross discipline exchange.
9	Pro-active advocacy for increased awareness on issues my organization feels very strongly about: access, inclusion and empowerment for all persons with diverse abilities in the life and activities of their communities and societies.
10	Increased focus on partnership with destination, involve destination in event design from start, search for true win-win between destination, event and delegates.
11 å	Our on-line education platform allows us to share information from our World Congress to a wider audience and to sustain educational activity between congresses. This serves both as a legacy and stimulus for our congresses.
12	Innovative products. More interaction possibilities.
13	Evaluating scale of meeting and accessibility.
14	Decisions about site dictated by previous experience.
15	By applying and implementing feedback as a catalyst for change.
16	We are currently studying this and will be conducting a society-wide needs assessment to address this.
17	Working with the CVB to look at public engagement options within the city.
18	The events are conceived in close collaboration with local stakeholders; the added value is obvious for both sides.
19	We're still assessing the impact of our new legacy initiatives at this time.
20	Open up to more young talent and broaden the prospectus of the research that is presented.
21	Round table sessions with members to glean their thoughts and requirements.
22	More involvement of the attendees in defining long-term goals and strategies.

6.2 MELBOURNE CONVENTION BUREAU: THE POSTER CHILD FOR CONVENTIONS IN THE CONVERGENCE ECONOMY



From "The Future of Business Meetings Industry Report;" Melbourne Convention Bureau (2017)

Skift Take

The Melbourne Convention Bureau provides a template for best case practices illustrating how convention bureaus and governments are aligning efforts to engage a broad scope of destination stakeholders with visiting conventions to further the region's economic strategy.

In 2016, the Victoria state government in Australia launched the Visit Victoria platform and VisitVictoria.com website to bring together the functions of Tourism Victoria's marketing division, the Victorian Major Events Company, and the Melbourne Convention Bureau "to form a single, unified organization dedicated to growing Victoria's visitor economy through tourism marketing and event acquisition."

Melbourne Convention Bureau is already one of the world's most forward-thinking organizations of its kind in terms of incorporating the full scale of the city's innovation economy into the convention bid process and overall delivery. The new Visit Victoria initiative is designed to further coalesce the resources of the region's local stakeholders to provide a broader spectrum of potential partnerships for visiting organizations to integrate into their conventions. It was also created to improve the levels of engagement between the state government and the local public and private sectors.

"What that has done for us, we now have a lot more access to government," says Karen Bolinger, CEO of the Melbourne Convention Bureau. "We've always had access but we were still a bit at arm's length. Now we have our tentacles a little bit deeper, so we get better access into what the government is looking at in terms of their priority sectors, and access to ministers to support bids. Sometimes it's just a matter of having more ability to walk across the floor and say, 'Hey Governor, what do you think?'"

In March 2016, the Victorian government launched the "Future Industries Sector Strategies" series, which is part of the Sector Growth Program, to codify the region's vision to build up its priority sectors. That includes greater collaboration with the Melbourne Convention Bureau to develop a variety of industry-specific conventions.

Here's more from one of the Sector Strategies reports — "Victoria's Future Industries: Medical Technologies and Pharmaceuticals Sector Strategy":

"Through partnerships with the Melbourne Convention Bureau, industry associations and the sector, we will continue to attract and support networking events and activities that encourage organisations to connect both locally and globally. Activities will focus on targeted collaborative opportunities and seek to engage groups across and outside of the sector (e.g. venture capital, clinicians, ICT companies). We will also work with the sector to establish industry working groups to provide a single forum for government engagement and to create a collaborative environment for shared learning and best practice."

That increasing collaboration between the bureau and government to develop conventions in growth industries expands the bureau's capability to engage convention organizers in those industries.

The bureau also stresses the sector expertise and academic thought leadership throughout the state of Victoria, and the increasing role of government to support conventions in specific sectors, to deliver a richer attendee experience.

"The Victoria government are the ones who are charged with moving industry forward so they have an incredible amount of sector knowledge, sector engagement, and connections and networks," says Bolinger. "So there's absolutely a deeper collaboration now, and that's what we're bringing to the table more than we ever have before."

But why is that important to association executives and planners who might be considering Melbourne to host their convention?

"It's important because everything is much more competitive, so we actually have to demonstrate and understand each one of the associations when we're bidding for their conference," explains Bolinger. "We have to have not just the infrastructure in the city, but the intellectual capacity to make sure their programs and content are world class."

Overall, the new Visit Victoria platform is designed to raise Melbourne's exposure on the world stage by promoting a broader scope of the destination experience. In February 2017, the Melbourne Convention Bureau published "The Future of Business Meetings Industry Report" to show how the global meetings industry is evolving "through the influences of social trends, new technology, and changing attendee expectations."

> "OUR CONVENTIONS ARE USING THE CITY IN A BROADER SENSE RATHER THAN JUST BEING IN A BUILDING, BECAUSE OUR DELEGATES WANT TO GET HANDS-ON, AND THEY WANT TO BE IN AN ENVIRONMENT THAT FACILITATES THE EXCHANGE OF INFORMATION."
>
> — KAREN BOLINGER, CEO OF THE MELBOURNE CONVENTION BUREAU

One of the survey questions asked: "How important will the destination experience be for promoting a conference in the future?

A full 85 percent responded that it is "extremely important" or "very important," while another 13 percent responded "somewhat important."

The survey data highlights the importance of a convention bureau, which develops and curates the destination experience for visiting delegates. Toward that end, the Melbourne Convention Bureau is increasingly working with creative partners in the city to continually add new layers to the way attendees can plug into the city's innovation economy.

One of those partners is the Carlton Connect Initiative (CCI) "innovation precinct" anchored by the University of Melbourne, with a mission to "drive partnerships between different sectors and disciplines to address global challenges that can't be solved by one sector alone." Melbourne Convention Bureau is seeing a rise of requests from conference organizers to explore the CCI and meet with its science and academic leaders.

"Our conventions are using the city in a broader sense rather than just being in a building, because our delegates want to get hands-on, and they want to be in an environment that facilitates that active exchange of information," says Bolinger.

"There's a little bit more freethinking these days, I think," she sums up. "Carlton Connect and those kinds of things are a value-add for our bids, because these people go to buildings all the time, and now with this they get a better feel for what's going on around them. It's not about sitting in a room and hearing people talk all day, but having the chance to ask a hundred questions and coming up with solutions as a group. It's really about the future of how we absorb information to develop new knowledge."

6.3 THE ROLE OF UNIVERSITIES IN EVALUATING THE LEGACY IMPACT OF CONVENTIONS

Skift Take

Convention bureaus and universities have an opportunity to support each other much more effectively. To accomplish that, there needs to be a process whereby serious academic research is streamlined into actionable information that is more accessible for industry. Academic research with clear policy directives is the only way that convention bureaus, economic development agencies, and governments can better evaluate the long-term economic impacts of conventions, and develop new strategies to build on their value moving forward.

Every discussion about the long-term economic impact of conferences begins with the previously discussed "Beyond Tourism Benefits" research developed by Business Events Sydney and the University of Technology Sydney going back to 2010. The most significant takeaway that city leaders can glean from the success of that collaboration is the role that the academic research played to support the growth of conventions in Sydney and their impact on New South Wales' collective innovation economy.

"I never went with my hand out asking for money, because that is the first thing that government ministers are expecting you to do when you walk through the door," says Lyn Lewis-Smith, CEO of Business Events Sydney. "So you have to do a lot of work to get to that point. If you can demonstrate the outcomes with that end in mind, then the money begins to flow."

Rob Davidson, managing director of the London-based MICE Knowledge consultancy, is a prolific academic researcher specializing in the convention industry. He says he characterizes conferences as "temporary clusters," where people from all over the world come together to share knowledge, not unlike a typical university campus.

"But it's more than just knowledge transfer at conferences; it's really about generating new knowledge when people discuss their research and product development, and then go on to work together to produce the kinds of innovations that all businesses need," Davidson suggests.

"To take a wide view of it, the collaboration at business events ultimately leads to benefits for society," he continues. "I think it's that type of impact that we really need to emphasize much more. It's not understood very well, and it's difficult to measure, of course, but I think it is absolutely imperative to look at what happens after conferences, and ultimately the value of the new discoveries they lead to."

According to Davidson, the biggest challenge right now is creating better collaborative research partnerships between convention bureaus and academia. The bureaus are always looking for help with their research to develop destination marketing and development strategy, and the universities are continually looking for things to research. He adds, however, there's a great disconnect and significant lost opportunities because destination marketers and professors are not talking to each other enough to explore their shared values and shared potential for the betterment of both their business and academic communities.

> "THERE'S A BIG GULF NOT ONLY BETWEEN LOCAL UNIVERSITIES AND THEIR CONVENTION BUREAUS, BUT BETWEEN ACADEMIA AND THE WHOLE BUSINESS EVENTS INDUSTRY."
>
> — ROB DAVIDSON, MANAGING DIRECTOR, MICE KNOWLEDGE

"There's a big gulf not only between local universities and their convention bureaus, but between academia and the whole business events industry," says Davidson. "There's all of this university research and journals dedicated to business events, but trying to get people to read that research is a real upward struggle. And I think that universities are really under-recognized for their contributions that they can make."

Universities have always propelled economic development in their communities. U.S. Senator Daniel Patrick Moynihan once said, "If you want to build a great city, create a great university and wait 200 years." But the rise of the tech sector over the last three decades, and the global war for high-tech jobs, has elevated universities to a new prominence in terms of the leadership they can provide to a world uncertain about the long-term impact of technology in business in general.

Stowe Shoemaker, dean of the William F. Harrah College of Hotel Administration at the University of Nevada, Las Vegas (UNLV), notes that Silicon Valley in Palo Alto exists where it does because of the computer science labs at Stanford and Berkeley, which in turn attracted so many tech companies.

"The role of a university, and especially what we would call an urban campus university, is to help drive economic development to the community," says Shoemaker. "As academics we do a lot of research that creates patents, and patents then lead to companies that get started by our graduates. Academic institutions are a major driver for innovation and the launch of startups."

As an example, he says, UNLV grads are starting companies in Las Vegas manufacturing indoor drones and developing AI-powered video game bots, thereby contributing to the local innovation economy and creating high-value jobs. However, connecting that energy in the local universities and local startup community with the region's base of travel suppliers is not happening enough, Shoemaker feels, which hampers any attempts to actually evaluate the economic value of those potential connections.

Shoemaker asserts that much more can be accomplished in tourism and hospitality schools to show the long-term impact of a city's visitor economy on its overall economic growth in the 21st century. But, he and many other academics say universities in the U.S. often don't have the personnel or resources to conduct policy research without significant private investment.

That's why UNLV's Hotel College is presently seeking funding to build a Center for Tourism Policy and Studies, which Shoemaker says would be a natural place for research exploring the legacy impact of conventions.

As a successful model for tourism research in U.S. academia, Shoemaker cites the Tourism and Economic Development Center of Economic Excellence at the University of South Carolina. The research facility was established for professors to conduct research that's directly applicable to tourism and economic development in South Carolina. The faculty, as such, is freed up from teaching to focus almost exclusively on tourism-related research for the purposes of advancing economic development strategy statewide.

"The advantage of having a tourism research center is that you have academics whose primary goal is answering research questions that come through from a policy level," explains Shoemaker. "They almost become consultants, except they wear an academic hat, but they're not teaching undergraduates, and they're not serving on university committees. They're primarily there to help move tourism policy forward."

Deborah Edwards, associate professor at University of Technology Sydney adds that the ongoing challenge for many convention bureaus is they don't have the in-house research teams to tackle this subject, especially with so much emphasis now on data analytics. Therefore, she suggests, bureaus should consider partnering with research professionals more proactively, who know how to collect data and draw insights from that data.

Except, cautions Edwards, "Universities are expensive so convention bureaus must be willing to put the necessary resources into the research."

Davidson, meanwhile, suggests that the industry needs more professionals who can collect and paraphrase relevant academic papers to make them more usable for convention bureau leaders, and help build a better working relationship between industry and academia.

"What's needed is an intermediary who can take those academic pieces of research and strip them down to what people in the industry really need to know," he says. "People in the industry do not need to know about the literature review, the scientific methodology, and all of the conceptual research framework. They want to know how this research helps me win more meetings for my convention center.

"Those findings are there but raw academic papers are long, and they're full of jargon. We need someone to make that information more accessible, but we don't have enough of those people now. That's the dilemma."

8 KEY TAKEAWAYS TO LEVERAGE CONVENTIONS TO DRIVE ECONOMIC DEVELOPMENT

1. **The meetings industry is a global innovation distribution channel —** Meetings and conventions should be positioned more upstream as global innovation distribution channels that support the networking and knowledge exchange required to build companies in today's digital platform economy. The meetings industry has long been identified as solely transactional, working downstream to drive the visitor economy in cities during off-peak periods. To elevate the perception of conventions as innovation and economic accelerators within the meetings industry, forward-thinking convention bureaus should position themselves more intentionally as nodes, or gatekeepers, on the global innovation distribution superhighway. In effect, they are launch platforms for government strategy to develop advanced and creative industry sectors.

2. **Convention bureaus are importers/exporters of knowledge and brokers of innovation —** Cities have always been the central hubs of innovation and progress going back to the Silk Route, but in the meetings industry, cities are often promoted to planners simply as a collection of venues and experiences near an airport. The most innovative CVBs today are connecting high-tech companies and international associations with a wider matrix of local stakeholders in their city's innovation economies, beyond the tourism sector. They're also using a broader scope of the urban geography as "knowledge collision platforms" for next generation meetings, spurring long-term economic development for more neighborhoods and more members of the local host community. There's an enormous opportunity for CVBs to rebrand and reposition their value proposition for convention organizers as brokers of innovation and engines of economic development beyond the visitor economy.

3. **Convention organizers should leverage a city's innovation economy for program content —** As cities develop their high-growth business and creative industries, spread across both startup and established companies, there is an ongoing commercialization of ideas in high-priority growth sectors. That is the definition of innovation, and there's a growing number of convention attendees who want to engage with local people who are leading that innovation to tap into their creative process and business intelligence. Therefore, government, CVBs, economic development agencies, and universities should collaborate more diligently to develop more integrated, consumer-facing resources and platforms, both online and offline, to spread that message and connect organizers with their city's intellectual capital.

4. **Make economic development more tangible and understandable —** Economic development organizations are the backbone of progress for any city, and they're collaborating much more intentionally with convention bureaus today to engage visiting industry experts before, during and after conventions. However, the economic development process is often murky and not immediately understandable for meeting planners interested in elevating their role from meeting planners to business-minded meeting strategists. Explaining the process more fully across the meetings industry will paint a clearer picture of how cities are evolving into the future, and how planners can tap into that energy and leverage that innovation.

5. **Embrace the concept: "Convergence is the new innovation" —** Innovation has been the key mantra for the business and government arenas since the birth of the digital economy, but the next evolution revolves around convergence. Cross-pollinating innovation with innovation across sectors and institutions is delivering new enterprise strategies for economic growth by bringing once-disparate industries together. Everything is now part of a larger ecosystem, but often one part of the system doesn't know what the other parts are doing. That is the biggest value proposition for next-generation convention organizers when they can facilitate networking across sector ecosystems where the common language is creative solution-building. Events like SXSW and C2 Montreal have already provided the template for the future "festivalization of meetings" that converges the commercial and creative industries, and numerous cities are rightly copying that formula and tweaking it to make it their own.

6. **Understand the contexts of the city's long-term strategic vision —** Every city publishes a variety of economic strategy and policy positioning reports on an ongoing basis to provide long-term direction and goals for the community, strengthen high-priority growth sectors, develop infrastructure, and improve living and education standards. In today's convergence economy, everything is related to everything. Only when all public officials and private stakeholders in a city have a collective understanding of the vision for the future of their region can they drive progress effectively by collaborating with visiting corporate and association convention leaders to their full potential.

7. **Define the future of cities as a connected platform for value exchange —** The smart city, or "city as platform" phenomenon, is not just about traffic lights with sensors, although too often the future of cities are characterized solely by the Internet of Things. From a holistic standpoint, a smart city is an interoperable, online/offline platform for value sharing and convergence building, where anyone anywhere can plug into that platform to connect with the people and organizations populating a city's innovation economy. If more convention bureaus and convention organizers viewed cities like any digital platform, such as Airbnb or Amazon, that would dramatically shift the conversation around how conventions can crowdsource intelligence in local communities, extend the window of engagement beyond the physical event, and expand audience reach worldwide.

8. **Engage academia to define the full economic impacts of conventions —** The most effective convention bureaus are economic development organizations, but there needs to be a huge upswell in research at the local level evaluating the long-term economic impacts of the conventions that bureaus are responsible for attracting. Traditional impact reports that primarily show delegate expenditure and the impact on local service and retail jobs are only telling half the story, if that. To facilitate the development of that research, there should be an expanded industry-wide conversation about increasing and improving the actionable value of academic research focusing exclusively on the meetings and conventions industry. Convention bureaus and universities have to develop closer collaboration, in general, before they can proceed to develop meaningful research around the long-term impact of conventions on a city's economic growth.

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15. Nevada Climbs From Last Place to First in Job Creation
16. Cleveland Carves Out a Clever Niche as Home to World Class Medical Meetings
17. St. Louis Tries to Rebrand the City for Meetings With a New Music and Tech Festival
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Dean Runyan Associates

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

Primary Research Conducted By
Dean Runyan Associates
Portland, Oregon

June 2018

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.

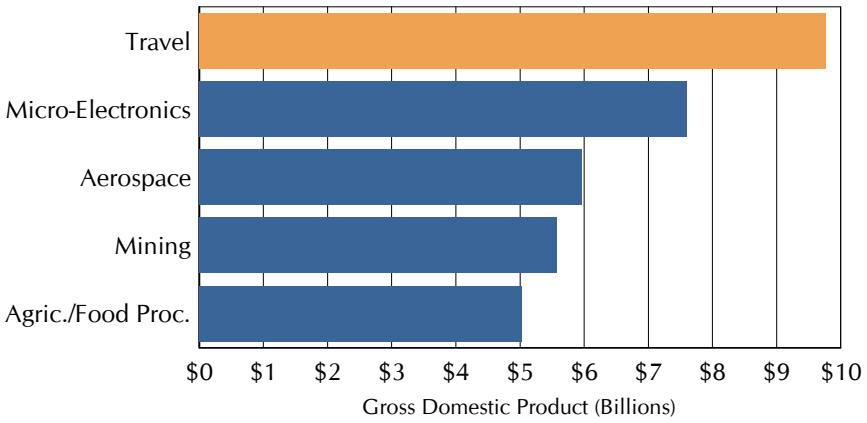
- ***Spending.*** Total direct travel spending in Arizona was $22.7 billion in 2017p. Non-transportation visitor spending increased by 6.3 percent, following a 3.3 percent increase from 2015 to 2016. Real travel spending increased by 5.0 percent in 2017p.
- ***Travel Activity.*** Visitor air travel on 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.

Selected Arizona Export Oriented Industries



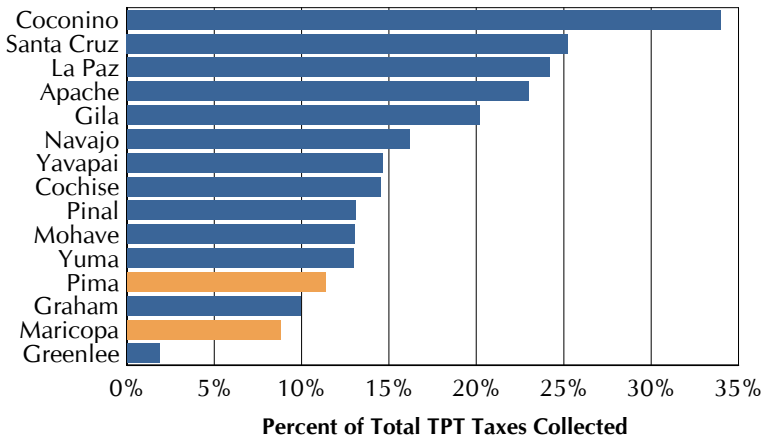
Note: Preliminary 2017 estimates by Dean Runyan Associates. Agriculture includes food and beverage processing industries.

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).

State Transaction Privilege Taxes

Generated by Direct Travel Spending



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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TABLE OF CONTENTS
Arizona Travel Impacts, 2000-2017p

		page
I.	**U.S. Travel**	**1**
II.	**Arizona Travel**	**5**
	Summary of Arizona Travel	6
	Travel Trends	7
	Seasonal and Regional Travel Impacts	9
	Visitor Origin	10
	Arizona Travel Industry Gross Domestic Product	11
	Gross Domestic Product of Arizona Export-Oriented Industries	12
	Direct, Secondary & Total Impacts	13
	Travel Impact Details	17
III.	**State and Local Government Revenue**	**18**
	Industry Gross Domestic Product and Taxes	18
	Arizona Tax Structure	19
	Travel Industry Tax Revenue	20
IV.	**Regional Travel Impacts**	**23**
V.	**County Travel Impacts**	**32**
	Appendices	**57**
A.	2017 Travel Impact Estimates	58
B.	Key Terms and Definitions	61
C.	Regional Travel Impact Model	62
D.	Travel Industry Accounts	63
E.	Arizona Earnings and Employment by Industry Sector	73
F.	Secondary Impacts Industry Groups	74

LIST OF TABLES AND FIGURES

I. US Travel

Annual Direct Travel Spending in U.S., 2000-2017p 2
Spending by Foreign and Resident Travelers in U.S. 2
Foreign Share of U.S. Internal Travel 3
Overseas Arrivals 3
Relative Value of Selected Foreign Currencies compared to U.S. Dollar 3
U.S. Travel Industry Employment 4
Components of U.S. Travel Industry Employment 4

II. Arizona Travel 5

Direct Travel Impacts, 2000-2017p 7
Arizona Direct Travel Spending, Real and Current Dollars, 2000-2017p 8
Air Passenger Visitor Arrivals to Arizona, US Air Carriers, 2000-2017 8
Arizona Taxable Lodging Sales, 2000-2017 8
Regional Shares of Arizona Taxable Lodging Sales, 2017 9
Taxable Lodging Sales by Region and Quarter, 2017 9
Arizona Taxable Lodging Sales by Quarter, 2007-2017 9
Arizona Visitor Spending by Origin of Visitor, 2017p 10
International Visitor Spending in Arizona, 2000-2017p 10
Arizona Travel Industry Gross Domestic Product, 2017p 11
Arizona Gross Domestic Product, 2017 (Selected Export-Oriented Industries) 12
Total Employment and Earnings Generated by Travel Spending in Arizona, 2017p 13
Direct & Secondary Employment Generated by Travel Spending, 2017p (graph) 15
Direct & Secondary Earnings Generated by Travel Spending, 2017p (graph) 15
Direct & Secondary Employment Generated by Travel Spending, 2017p (table) 16
Direct & Secondary Earnings Generated by Travel Spending, 2017p (table) 16
Arizona Travel Impacts, 2008-2017p (detail) 17

III. State and Local Government Revenue 18

Production & Import Taxes as a Percent of Gross Domestic Product 18
Arizona State & Local Government Tax Revenues, 2017-16 FY 19
Arizona Travel Industry State & Local Government Tax Revenues, 2017-16 FY 20
Arizona State & Local Tax Revenues, 2017-16 FY (table) 21
State Transaction Privilege Taxes Generated by Travel Spending, 2017 FY (graph) 21
State Transaction Privilege Taxes Generated by Travel Spending, 2017 FY (table) 22
State and Local Travel-Generated Tax Revenue per Household, 2017 22

IV. Regional Travel Impacts 23

Regional Impact Summary Tables 24-26
Regional Impact Detail Tables, 2008-2017p 27

IV. County Travel Impacts 32

Distribution of Travel-Generated Employment, 2017p 33
Percent of Total Area Employment that is Travel-Generated, 2017p 34
Travel-Generated Employment and Earnings Shares by County, 2017p 35
County Impact Summary Tables 36-41
County Impact Detail Tables, 2008-2017p 42-56

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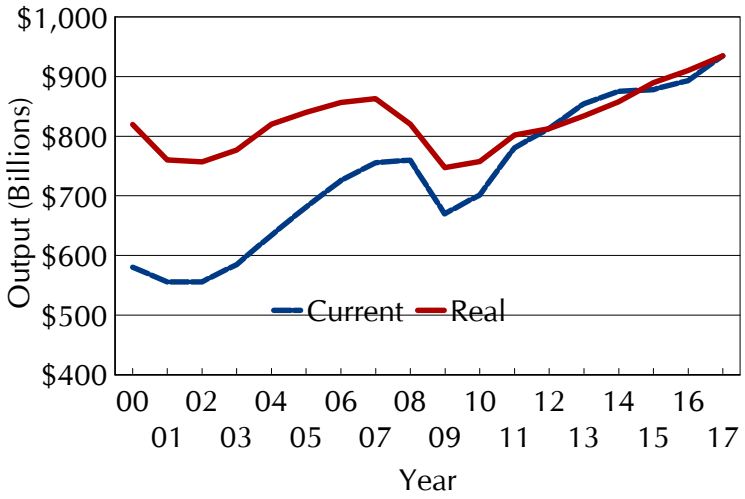
I. NATIONAL TRAVEL TRENDS



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.

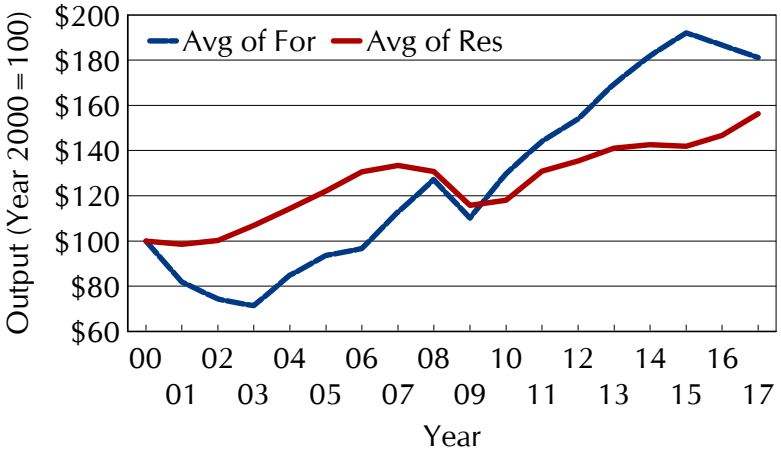
Annual Direct Travel Spending in U.S., 2000-17p



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.

Spending by Foreign and Resident Travelers in U.S.

(Curent Dollars; Year 2000 = 100)



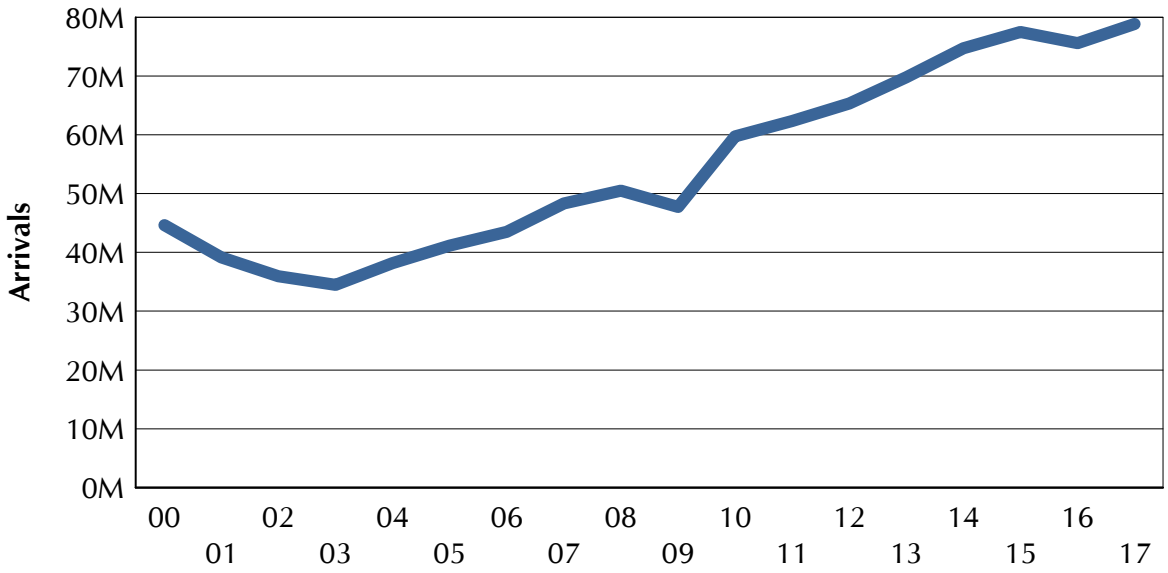
Note: Foreign visitor spending does not include expenditures on health and educational services or expenditures by short term seasonal workers.

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

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.

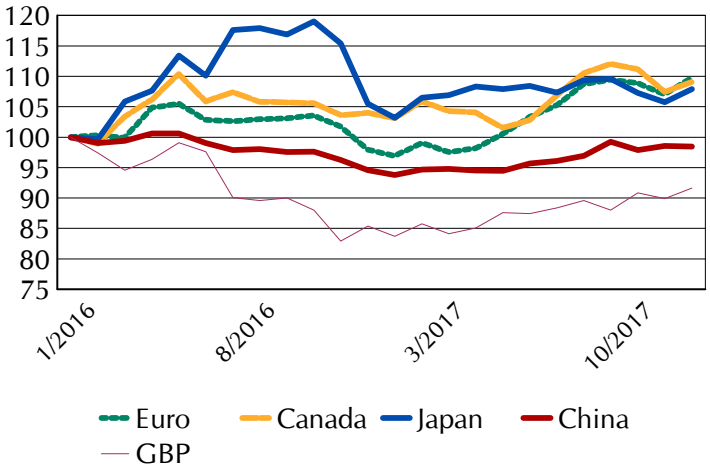
Foreign arrivals increased 4.3 percent from 2016 to 2017p. The dollar continues to remain strong against selected foreign currencies. This can apply downward pressure on international spending by lessening the purchasing power of the international visitor that has traveled to the U.S.

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:

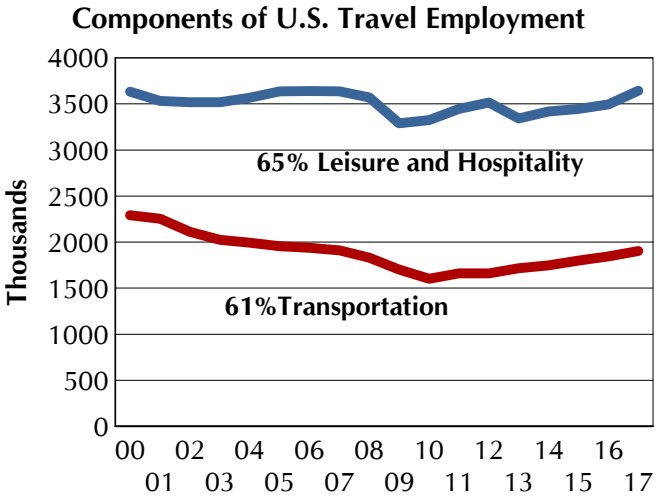
Overseas Arrivals: 2017 has been estimated using Tourism Economics annual change for overseas visitors from 2017 to 2016. The original source data is under review by the NTTO. National Travel and Tourism Office, U.S. Department of Commerce. Tourism Economics. *NTTO press release. https://bit.ly/2JTgmH1

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.

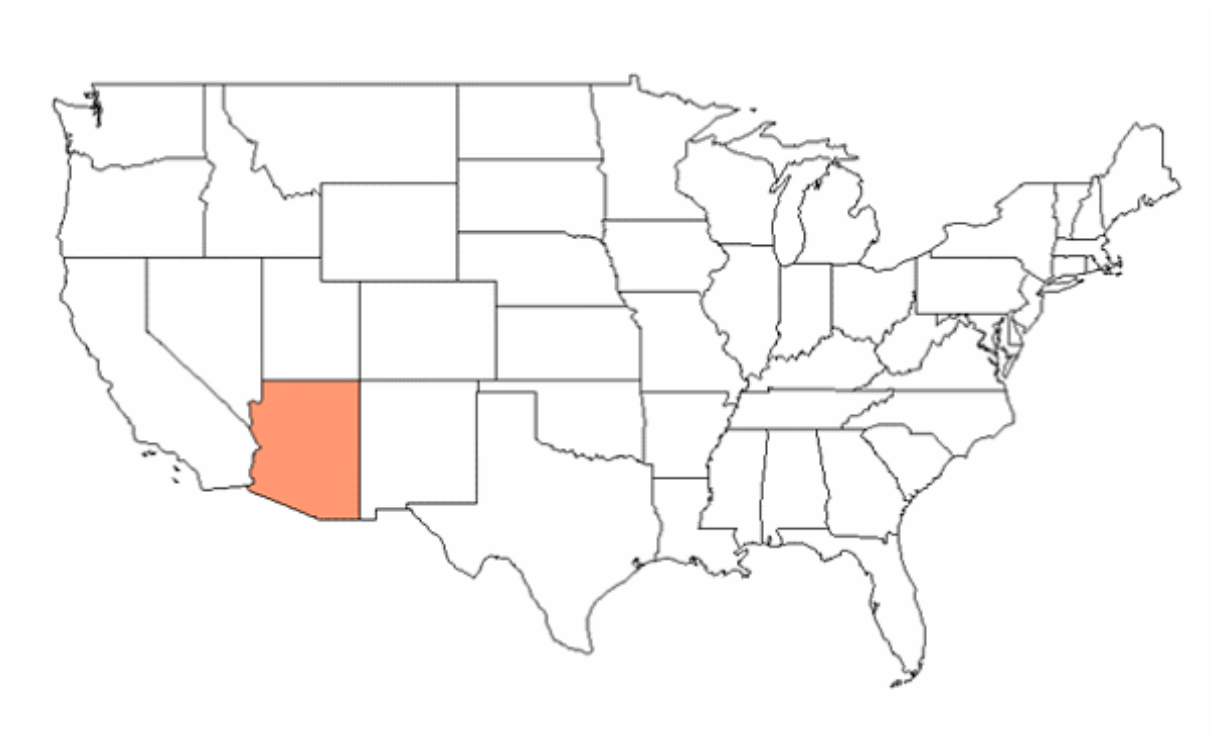


Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts.



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

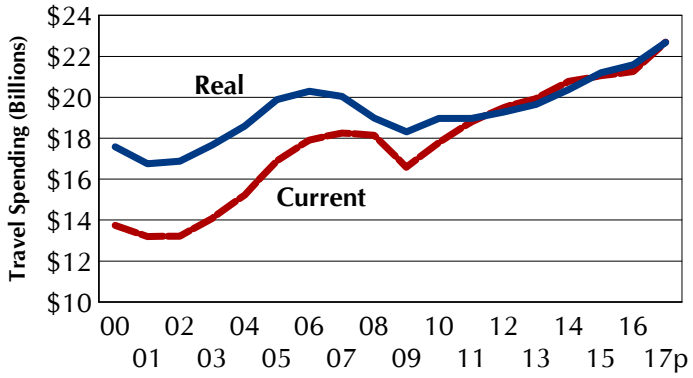
						Ave. Annual %Chg.	
Spending ($Billions)	**2000**	**2005**	**2010**	**2016**	**2017**	**16-17p**	**00-17p**
Total (Current $)	13.7	16.9	17.8	21.2	22.7	6.7%	3.0%
Other	1.7	1.9	2.0	2.6	2.8	5.1%	3.1%
Visitor	12.1	15.0	15.7	18.6	19.9	7.0%	3.0%
Non-transportation	9.4	11.1	11.1	13.8	14.7	6.3%	2.7%
Transportation	2.7	3.9	4.6	4.8	5.2	9.0%	4.0%
Earnings ($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

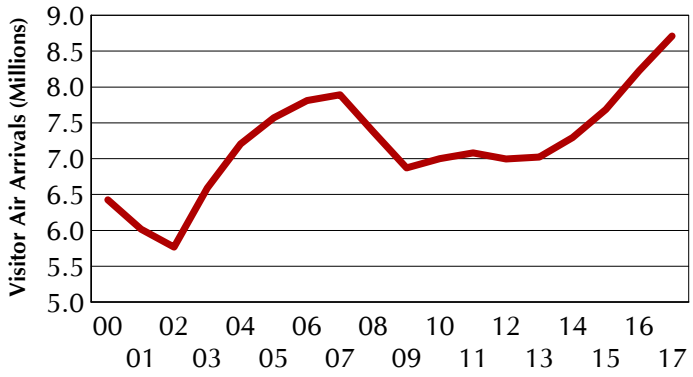


In real dollars (adjusted for inflation) Arizona travel spending increased by 5.0 percent over 2016. In current dollars, the increase was 6.7 percent.

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

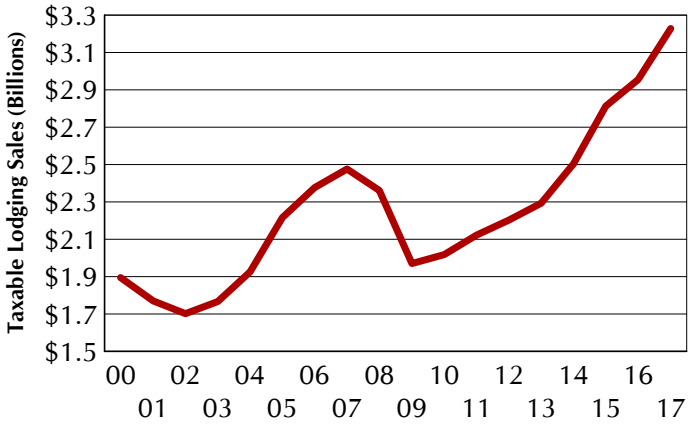
U.S. Air Carriers



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

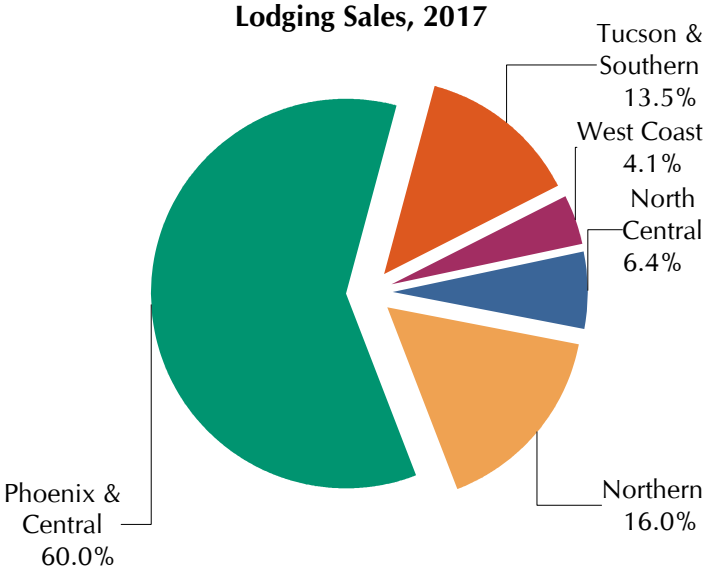
Lodging sales are used in this section to document seasonal patterns in the Arizona tourism industry. (Lodging sales are used because travel spending and related impacts are estimated only on a calendar year basis.)
The pie chart shows the annual distribution of lodging sales by region. The lodging sales 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.

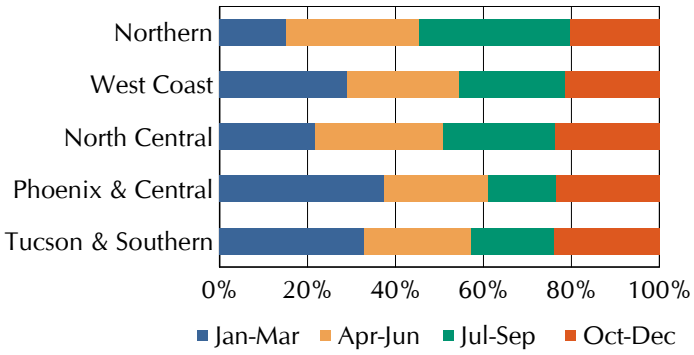
The next two graphs provide quarterly breakouts for the regions and the state.
Lodging sales are greatest in the first quarter for three of Arizona's tourism regions - the West Coast, Phoenix and Tucson. By contrast, spring and summer quarters are most important for the Northern and North Central regions.

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.

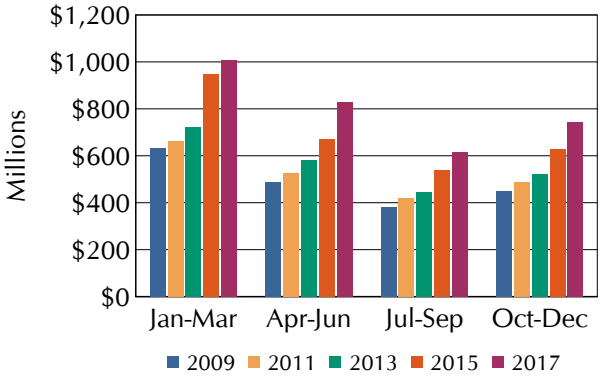
Regional Shares of Arizona Taxable Lodging Sales, 2017



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

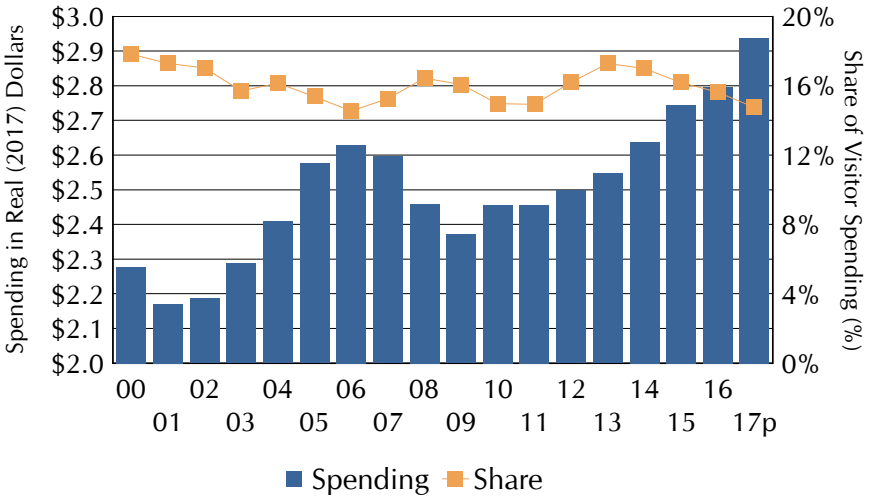
Out-of-state travelers generate more than three-fourths of the visitor impacts in Arizona. Visitors from other states are the largest segment (more than 68 percent of spending), while international travel, including day travel from Mexico, comprises approximately 15 percent of visitor impacts. The share 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



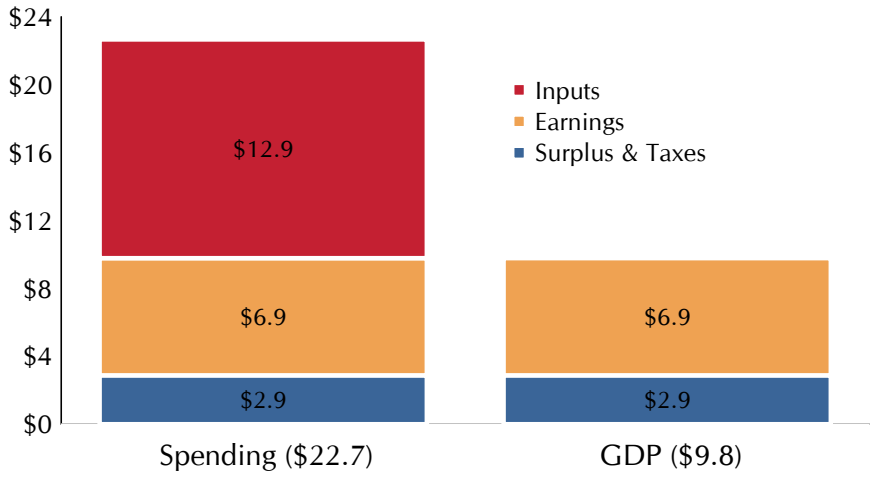
Sources: See above chart for source of international estimates. See first graph on preceding page for constant dollar estimates. Constant dollar visitor spending does not include "Other Travel."

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].

Arizona Travel Industry Gross Domestic Product, 2017p



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

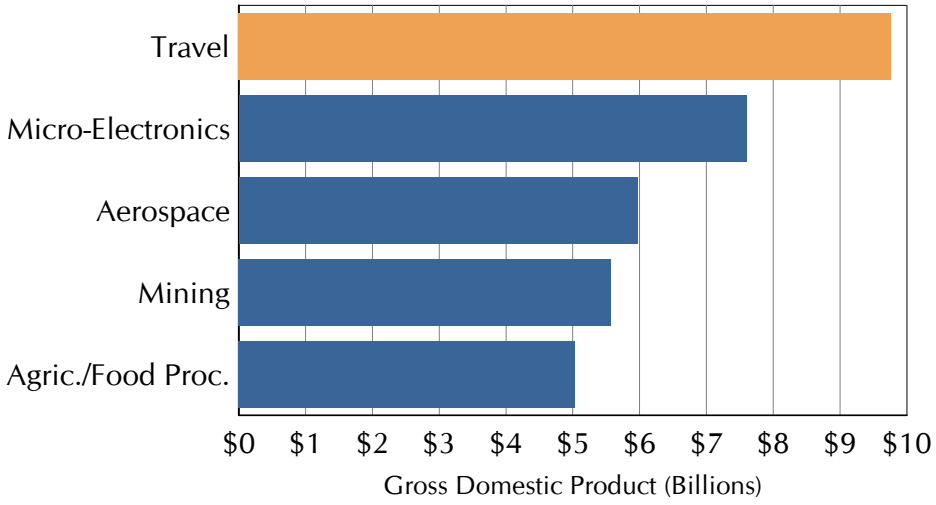
[2]. About 40 percent of the $12.9 billion of inputs and goods resold are purchased from other Arizona businesses.

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.

GDP of Major Arizona Export Industries



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:

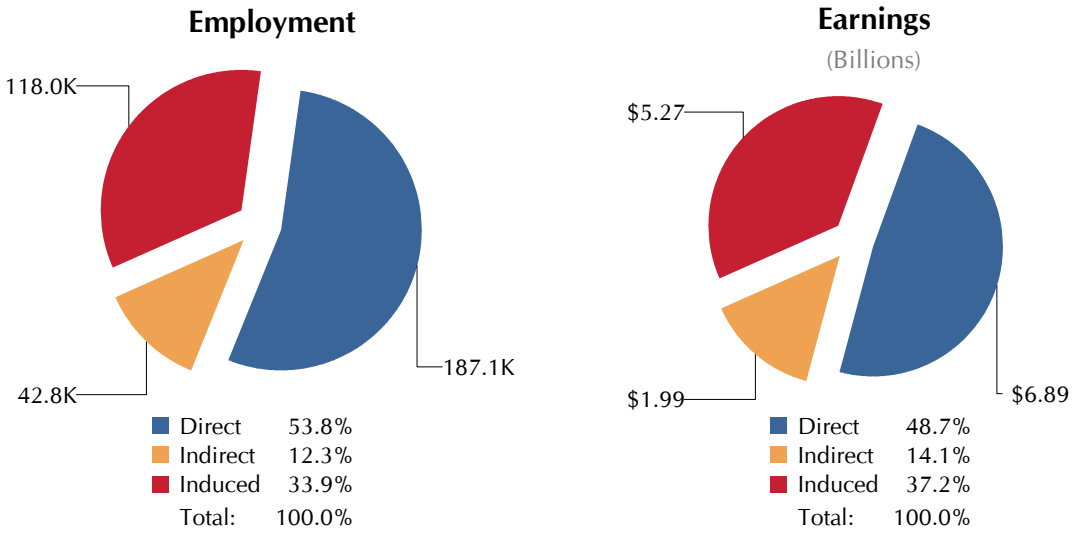
- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Trade**
- **Transportation**

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.

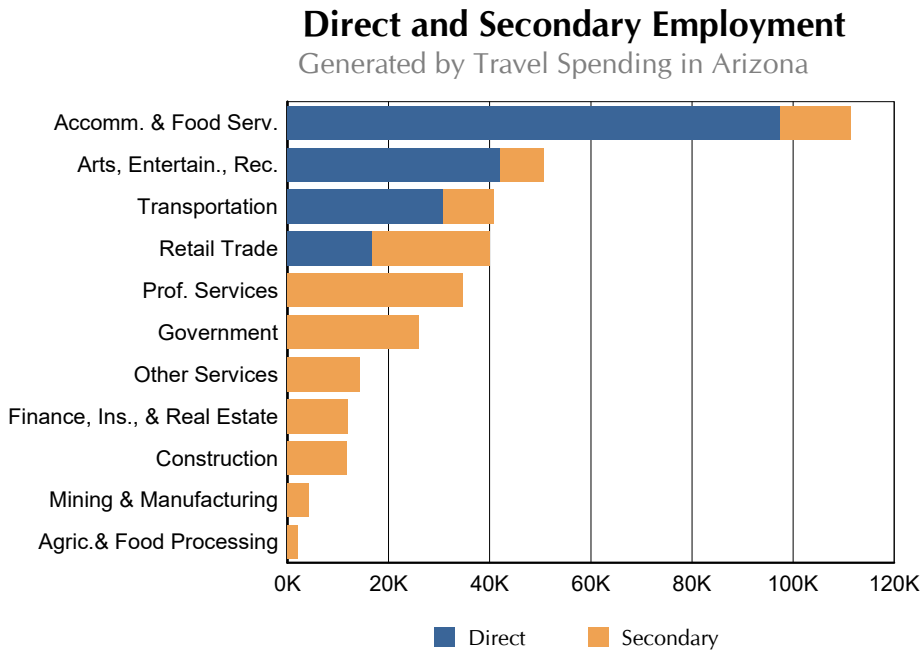
The indirect and induced impacts of travel spending are found in all thirteen industry groupings shown in the following tables and graphs. To summarize the primary secondary impacts:

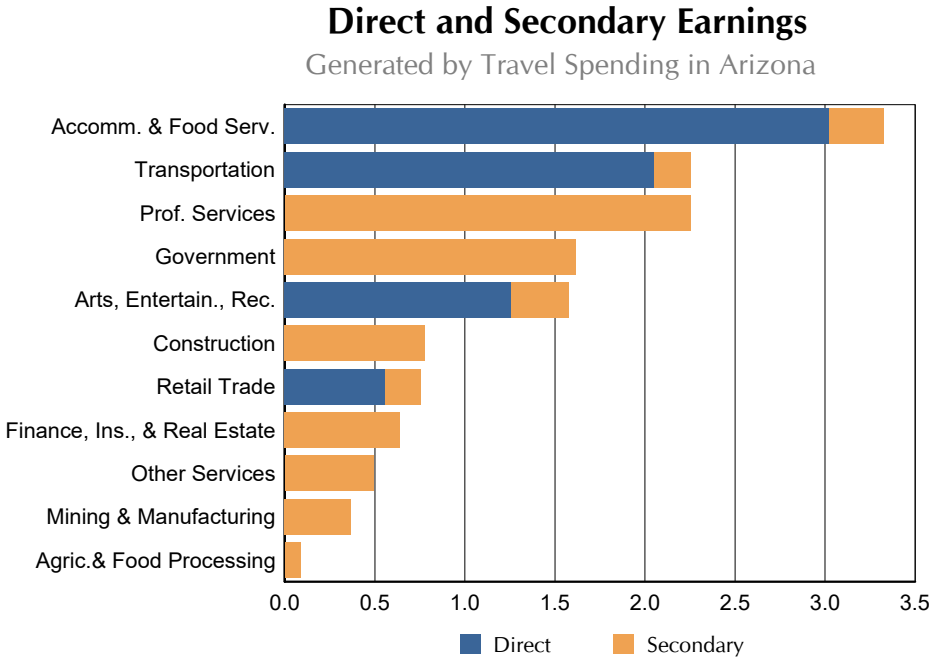
- **Professional & Business Services** (34,600 jobs and $2.3 billion earnings). A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses (indirect effect). Employees of these firms also purchase professional services (induced effect).
- **Other Services** (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).





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.

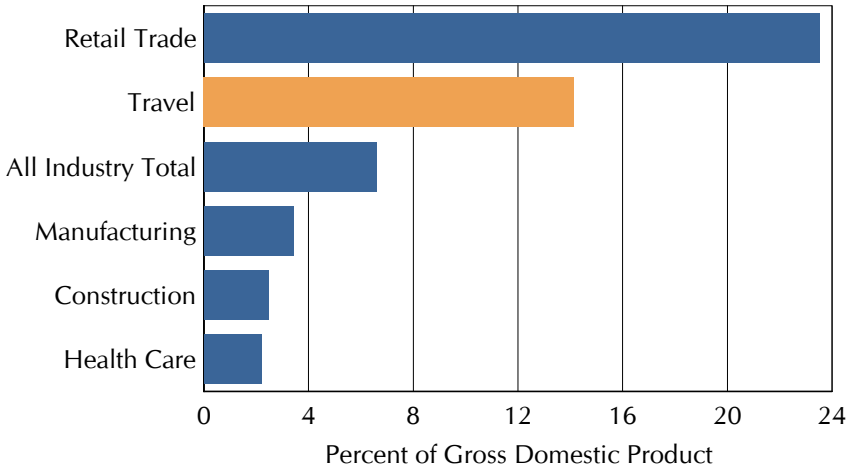
III. STATE AND LOCAL GOVERNMENT REVENUE

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%

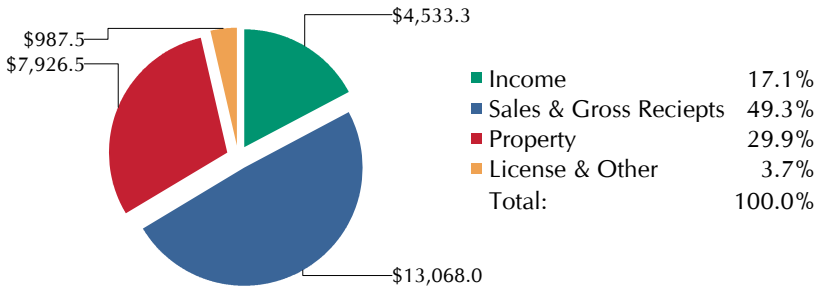
The remainder of this report will focus on the travel industry and the specific tax contributions made to state and local government in Arizona. In addition to the taxes on production discussed in the previous section, the tax payments of travel industry employees derived from the income earned from 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)



Visitor Sales	1,198M	64.8%
Employee Sales	273M	14.8%
Income	133M	7.2%
Property	189M	10.2%
Other	56M	3.1%
Total:	1,849M	100.0%

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.

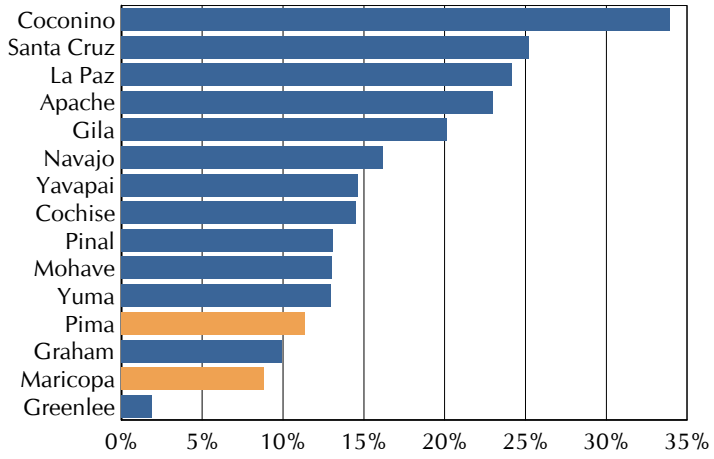
Summary

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.

State Transaction Privilege Tax
Generated by Direct Travel Spending, FY 2017



Source: Arizona Department of Revenue and Dean Runyan Associates. Graph derived from table on following page.

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)

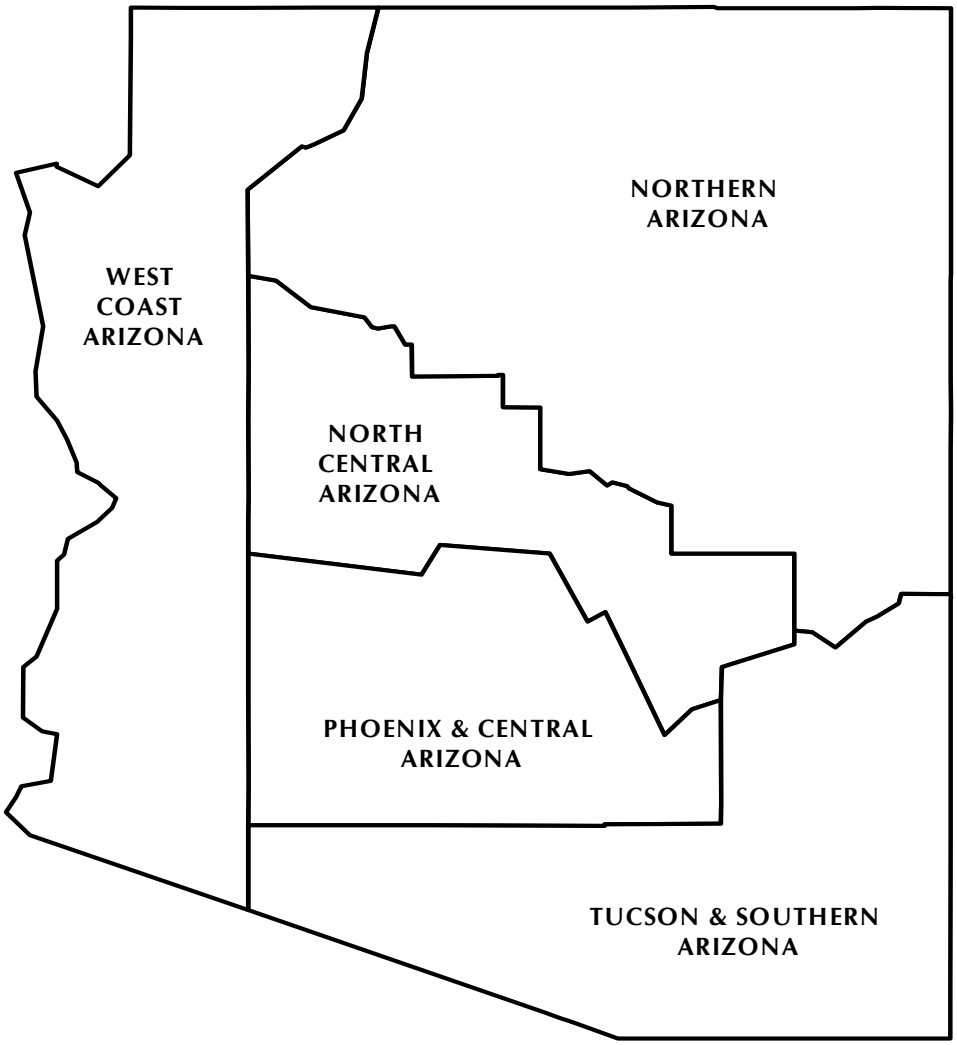
	Total	Travel	Percent
Apache	14.9	3.4	23.0%
Cochise	69.5	10.1	14.5%
Coconino	155.9	52.9	34.0%
Gila	31.9	6.4	20.2%
Graham	20.7	2.1	9.9%
Greenlee	23.0	0.4	1.9%
La Paz	13.5	3.3	24.2%
Maricopa	4,006.0	351.9	8.8%
Mohave	133.6	17.4	13.0%
Navajo	66.9	10.8	16.2%
Pima	749.1	85.1	11.4%
Pinal	156.1	20.4	13.1%
Santa 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 arrangment 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 arrangment 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 arrangment 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 arrangment 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

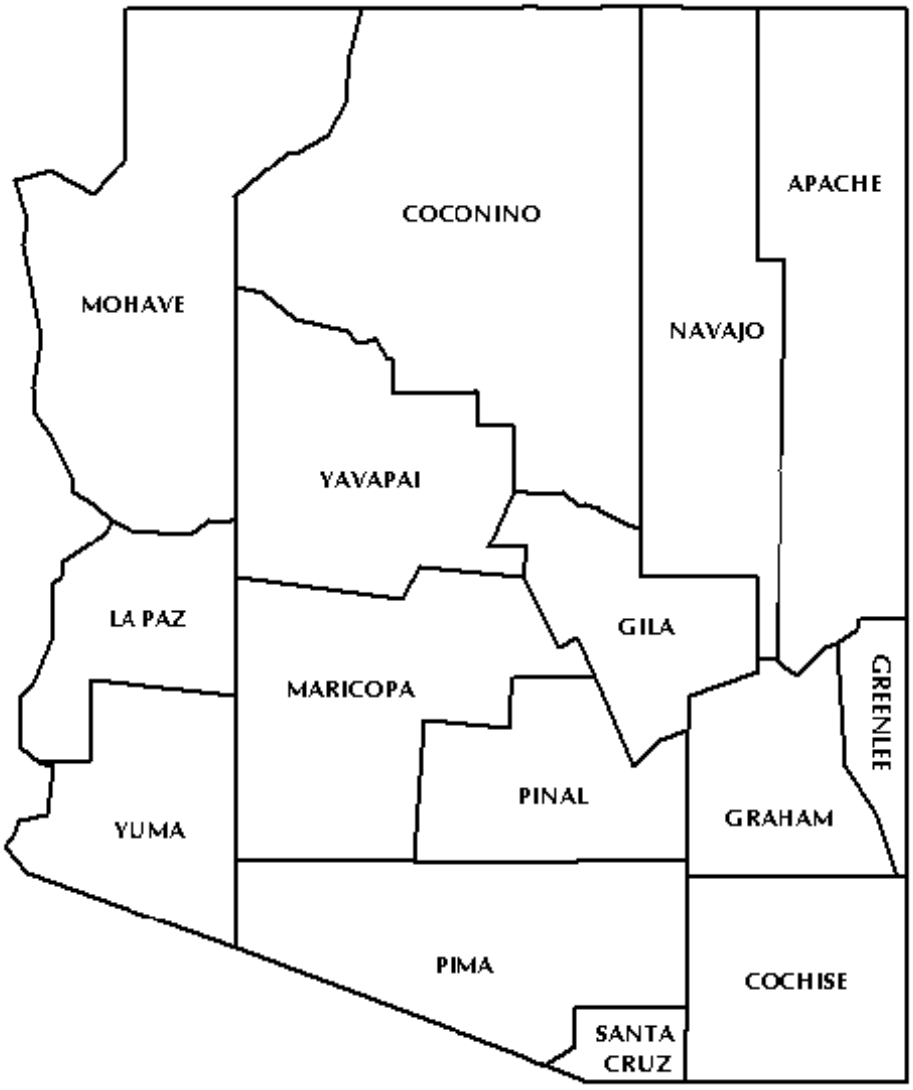
2008-2017p

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 arrangment 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

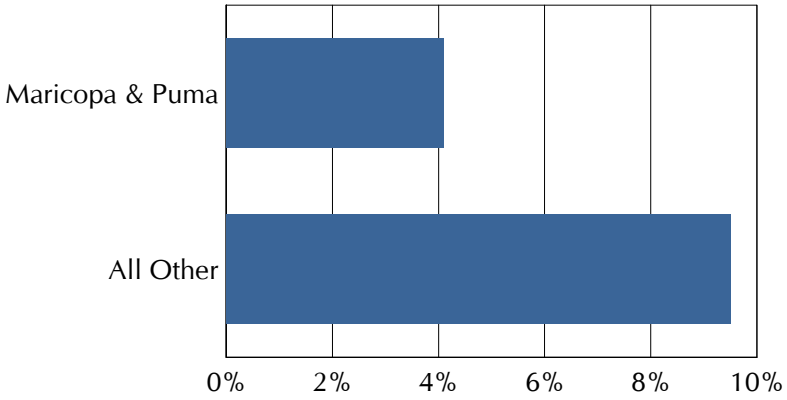
Percent of State Direct Travel



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

	Travel Spending		Related Travel-Generated Impacts				
					Taxes		
	Total ($Million)	Visitor ($Million)	Earnings ($Million)	Employment (Jobs)	Local ($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	Annual Percent Chg. 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)

Apache	**2008**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**16-17p**	**08-17p**
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	**2008**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**16-17p**	**08-17p**
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	**2008**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**16-17p**	**08-17p**
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	**2008**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**16-17p**	**08-17p**
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	**2008**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**16-17p**	**08-17p**
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	**2008**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**16-17p**	**08-17p**
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.

Arizona Office of Tourism

Proposition 302
Maricopa County Promotion
Awards and Guidelines – FY2019

Section 4

ARIZONA
OFFICE OF TOURISM

PROPOSITION 302

MARICOPA COUNTY TOURISM PROMOTION PROGRAM

FISCAL YEAR 2019

- **AWARD ALLOCATIONS**
- **PROGRAM GUIDELINES**

100 N. 7th Ave, Suite 400, Phoenix, AZ 85007 ♦ [P] 602.364.3700 [F] 602.364.3702
Douglas A. Ducey, Governor ♦ Debbie Johnson, Director
Business - Tourism.az.gov ♦ Travel Information - VisitArizona.com

ARIZONA
OFFICE OF TOURISM

FY2019 Proposition 302 Maricopa County Program
Tourism Promotion Program

Destination Marketing Organization (DMO)	Dept of Revenue % of Gross Hotel Sales Taxes Calendar Year 2017	Projected FY19 Allocations
City of Chandler	4.227%	$329,875.96
City of Glendale	2.303%	$179,767.84
City of Peoria	1.083%	$84,494.82
City of Surprise	.928%	$72,457.85
Greater Phoenix CVB	44.605%	$3,481,280.97
Mesa CVB	7.546%	$588,946.20
Scottsdale CVB	25.906%	$2,021,896.52
Tempe CVB	8.129%	$634,419.20
Town of Fountain Hills	.428%	$33,436.03
Town of Gilbert	1.306%	$101,960.23
Wickenburg Chamber of Commerce	3.539%	$276,220.96
Totals for DMO's	**100.0%**	**$7,804,756.58**
Arizona Office of Tourism (10%)		$867,195.17
GRAND TOTAL for DMO's & AOT		**$8,671,951.75**

Arizona Office of Tourism
118 N. 7th Ave., Ste. 400
Phoenix, AZ 85007
(602) 364-3697

Fiscal Year 2019 Proposition 302 Maricopa County Marketing GUIDELINES

Due Date: Applications must be received at the AOT office no later than 5:00 p.m. Friday, May 25, 2018

These documents supersede all guidelines issued for any previous fiscal year Proposition 302 marketing program.

OFFICE LOCATION

Arizona Office of Tourism
118 N. 7th Ave., Ste. 400
Phoenix, AZ 85007
Attention: Becky Blaine

Agency Contact
Becky Blaine
Deputy Director
Telephone Number: 602.364.3696
Fax Number: 602.364.3702
E-Mail: bblaine@tourism.AZ.gov

ARIZONA OFFICE OF TOURISM (AOT)
PROPOSITION 302 MARICOPA COUNTY MARKETING PROGAM

Purpose

In 1999 voters approved the Proposition 302 initiative, which includes funding to promote tourism in Maricopa County. Funding is derived over a 30 year period from a car rental surcharge and a 1% tax on hotels in Maricopa County.

In accordance with A.R.S. § 41-2306, funding is continuously appropriated to the Arizona Office of Tourism (AOT) which, in consultation with a consortium of destination marketing organizations in Maricopa County allocates funding to promote tourism within Maricopa County and shall not be spent for administrative or overhead expenses.

Arizona Revised Statutes, Chapter 19, Article 1
41-2306. Tourism fund
(Caution: 1998 Prop 105 applies)
A. The tourism fund is established consisting of separate accounts derived from:
1. State general fund monies appropriated to the fund by the legislature. All monies in this account are continuously appropriated to the office of tourism for the purposes of operations and statewide tourism promotion.
2. Revenues deposited pursuant to section 5-835, subsection B or C. All monies in this account are continuously appropriated to the office of tourism, which, in consultation with a consortium of destination marketing organizations in the county in which the tourism and sports authority is established, shall be spent to promote tourism within that county. For fiscal years 2010-2011 and 2011-2012, fifty per cent of the revenues deposited in the tourism fund pursuant to this paragraph may be expended by the office of tourism for operational and administrative purposes.
3. Revenues deposited pursuant to section 42-6108.01. The legislature shall appropriate all monies in this account to the office of tourism, which, in conjunction with the destination marketing organization in the county in which the tax revenues are collected, shall be spent only to promote tourism within that county and shall not be spent for administrative or overhead expenses.
4. Revenues deposited pursuant to section 5-601.02(H)(3)(b)(iv). The office of tourism shall administer the account. The account is not subject to appropriation, and expenditures from the fund are not subject to outside approval notwithstanding any statutory provision to the contrary. Monies received pursuant to section 5-601.02 shall be deposited directly with this account. On notice from the office of tourism, the state treasurer may invest and divest monies in the account as provided by section 35-313, and monies earned from investment shall be credited to the account. No monies in the account shall revert to or be deposited in any other fund, including the state general fund. Monies in this account shall supplement, not supplant, current funds in other accounts of the tourism fund. Monies in this account shall be spent only to promote tourism within the state and shall not be used for administrative or overhead expenses.
B. Monies in the fund are exempt from the provisions of section 35-190 relating to lapsing of appropriations.

TABLE OF CONTENTS

Eligibility	1
General Project Requirements	1
Application Procedure Guidelines	2
Approval Process Guidelines	8
Project Development Guidelines	8
Project Modification and Withdrawal Guidelines	11
Expense Reporting Guidelines	11
Project Evaluation Guidelines	13
Failure to Comply	15
Further Assistance	15
Appendix A FY2019 Affidavit in Support of Application	16

1. Eligibility

All applicants must meet all requirements listed directly below to be eligible for Proposition 302 funding:

- Applicants must have the established designation as the Destination Marketing Organization (DMO) for a city or town within Maricopa County. A DMO is defined as the primary governmentally-designated unit responsible for the promotion/marketing of a destination on a year-round basis.
- The DMO must have been in existence for at least one (1) year prior to the current funding year.
- The applying DMO must have a tourism marketing budget of at least $123,000 for FY2019, excluding administrative costs and exclusive of funds anticipated from this marketing program.

No extensions will be granted. Failure to provide application and expense reports by dates indicated in sections 3.5 and 7.7 will jeopardize current year funding allocations and any future funding.

Maricopa County communities that do not meet the above requirements may partner with an eligible DMO to submit a Prop 302 Maricopa County Marketing Program regional co-operative application.
A community is defined as a city or town that has tourism product (for example a hotel) but is not the DMO.

Organizations submitting a regional co-operative (co-op) application must meet all of the additional requirements listed directly below:

- At least **one** applying co-op DMO must have a tourism marketing budget of at least $123,000 for FY2019. This does not include represented community budgets and excludes administrative costs, and funds anticipated from this marketing program.
- Promotional efforts must represent projects benefiting each participating community. Co-op applications must identify community representation for each activity and project in the Prop 302 application.
- Co-op applicants must form an advisory consortium with representation from each participating organization. Members of this advisory consortium shall work together to determine how co-op dollars are used.
- Co-op applicants shall submit a notarized FY2019 Affidavit (appendix A) from each participating community identifying 2017 gross hotel sales with the completed Prop 302 application.

Applicants should read and be familiar with the entire Arizona Office of Tourism Prop 302 Maricopa County Marketing Program Guidelines before submitting an application to AOT.

Funding

Funding for Prop 302 is contingent upon the approved FY2019 budget for the Arizona Office of Tourism. A reduction in the budget may result in a reduction to Prop 302 Marketing funds.

2. General Project Requirements

To qualify for funding, projects must meet both of the following requirements;

- The primary function of the project **must be** tourism promotion. Tourism promotion is defined as the intent to drive overnight visitation to a respective community.
- Qualifying projects are limited to the creation and implementation or continuation of new or expanded marketing programs over and above programs that existed in FY2001.

3. Application Procedure Guidelines

This section of the Guidelines provides a step-by-step guide for submitting the Prop 302 Maricopa County Marketing Program application. Divide the application into three (3) sections, labeled A through C, as detailed below. To facilitate the application review process, please submit your application in an organized, easy to read format. Collate the application, include dividers for each section (A-C) of the application and number each page.

3.1 **SECTION A** - Applicant Administrative Information

3.1.1 Name of Applicant Organization: The name of the applicant organization must be the same as it appears on the FY2019 Affidavit in Support of Application (Appendix A).

3.1.2 Mailing Address: Provide a mailing address that can be used by AOT for routine correspondence.

3.1.3 Physical Address: Provide a physical address (no P.O. Boxes) for deliveries.

3.1.4 Project Coordinator's Name and Title: The project coordinator is responsible for administering the project and will be the day-to-day contact for AOT. This individual is also responsible for submitting all the necessary documentation throughout the yearlong effort of this project and must be familiar with the specifics of the program as well as the application being submitted.

3.1.5 Project Coordinator's Telephone Number, Fax Number and E-mail address: If any of this information changes, inform AOT immediately.

3.1.6 Funding Amount: Indicate the amount of funding for which the applicant is requesting Prop 302 Maricopa County Marketing Program funds.

3.1.7 Signatures: Applications must bear the signatures of the project coordinator and the administrative official (the person authorized to verify the applicant's marketing budget). Two different signatures are required for processing. The signatures on the application certify compliance with all Prop 302 Maricopa County Marketing Program Guidelines.

3.2 **SECTION B** - Project Element Guidelines

In this section of the application, list all the projects for which the applicant will be requesting Prop 302 Maricopa County Marketing Program funding. For each type of project, provide the details specified below. Indicate if the project is new (new as of FY2019), expanded (expanded from programs that existed in or previous to FY2001) or ongoing (continuous Prop 302 projects). For tracking and evaluation purposes identify the type of activity measures, performance measures and productivity metrics. Use the examples below as a guide for each project request.

3.2.1 Print Placement (magazines and newspapers)

Specify the name of the publication, the size of the ad and color, the issue date, the distribution, circulation number and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Publication Name	Ad size/color	Issue date	Distribution	Circulation Number	Budgeted Cost	Types of Metrics	Status
Golf Magazine	½ P, 4C	Jan 2019	Western Region	275,000	$8,000	Activity Performance Productivity	New Expanded Ongoing

3.2.2 Broadcast Placement (radio and television)

Specify the station call letters, the designated market area (DMA), the length of the spot and frequency (number of times spot will run), the broadcast dates and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Station Call Letters	DMA	Spot Length/ frequency	Broadcast Dates	Budgeted Cost	Types of Metrics	Status
KKQR	Seattle	:60/30	Feb 6 – 17, 2019	$ 3,000	Activity Performance Productivity	New Expanded Ongoing

3.2.3 Outdoor Placement (billboard, busboards, wallscapes)

Specify the type of outdoor placement, the location, size, dates of display and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Type of Placement	Location	Size	Dates	Budgeted Cost	Types of Metrics	Status
Billboard	I-10	10’ x 40’	Nov 15 – Dec 15	$2,500	Activity Performance Productivity	New Expanded Ongoing

3.2.4 Digital Media

Specify the name of the site, the website address, a description of the type of ad (e.g. banner ad, link, sponsorship, mobile application), the website's target market, the dates and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name of Site	Website Address	Ad Description	Target Market	Dates	Budgeted Cost	Types of Metrics	Status
Expedia	www.expedia.com	Banner ad	New York	10/1-10/31	$5,000	Activity Performance Productivity	New Expanded Ongoing

3.2.5 Website Development/Enhancement (for tourism related sites only)

This section is to be used for your community/DMO's website. Please note that the Prop 302 Maricopa County Marketing Program funding is available for **sites that feature tourism related material only**. In this table, you must list the name of your website, the website address, a description of the project and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Website Name	Website Address	Project Description	Budgeted Cost	Types of Metrics	Status
Arizona History Traveler	www.azhistorytraveler.org	Creation of site	$75,000	Activity Performance Productivity	New Expanded Ongoing

3.2.6 Printed Material (brochures, maps, travel guides)

List the type of printed material, the target audience, the quantity required, the area of distribution and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name/type of printed material	Target Audience	Quantity	Distribution	Budgeted Cost	Types of Metrics	Status
Glendale Tourism Brochure	Arizona residents	50,000	Statewide rack displays	$5,000	Activity Performance Productivity	New Expanded Ongoing

3.2.7 Audio-Visual (film, video, and DVD/CD)

List the type of audio-visual material, the target audience for the material, the quantity required, the distribution and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name/type of audiovisual material	Target Audience	Quantity	Distribution	Budgeted Cost	Types of Metrics	Status
Promotional video tape of destination	Canadian tour operators & travel agents	500	Trade shows	$3,500	Activity Performance Productivity	New Expanded Ongoing

3.2.8 Travel Show (booth space, registration fees)

List the name of the show, the dates and location of the show, the target audience and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name of Show	Date	Location	Target Audience	Budgeted Cost	Types of Metrics	Status
World Travel Market	Nov 5-7, 2018	London, England	European tour operators & media	$3,200	Activity Performance Productivity	New Expanded Ongoing

3.2.9 Media Communications and Public Relations (contracts, familiarization tours)

List the name and/or type of project, a brief description of the activities, list of attendees (for familiarization tours) and the budgeted cost. If a PR firm has been selected, list the name of the contractor and include the scope of work/contract with your application. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example.

Name/type of project	Brief Description	Budgeted Cost	Types of Metrics	Status
PR Contract	Press releases, fam tours, promotions, collateral development	$10,000	Activity Performance Productivity	New Expanded Ongoing

Selected Contractor: Perfect PR Group

3.2.10 Event Sponsorships

List the name of the event, the date(s) of the event, a brief description of the event to be sponsored and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name of Event	Date(s)	Brief Description	Budgeted Cost	Types of Metrics	Status
Fiesta Bowl	Jan 1, 2019	College Bowl in Glendale	$100,000	Activity Performance Productivity	New Expanded Ongoing

3.2.11 Research and Strategic Planning

List the name and type of project, a brief description, the budgeted cost and the selected contractor. Remember to include the scope of work/contract with your application. See example below.

Name/type of project	Brief Description	Sub contractor	Budgeted Cost	Types of Metrics	Status
Conversion Study	Analysis of effective conversion of target cities campaign	Arizona State University	$25,000	Activity Performance Productivity	New Expanded Ongoing

3.2.12 Co-operative Programs

Submitting DMOs are encouraged to participate in co-op projects using Prop 302 funding in FY2014. Please provide a Name/type of project, dates, description of the project(s) and any supporting documentation pertaining to this project, as well as the budgeted cost and participating DMOs (includes CVBs, chambers of commerce, universities and tribal entities). Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name/type of project	Date(s)	Description	Budgeted Cost	Participating DMOs	Types of Metrics	Status
Globe and Mail	Nov 15, 2018 – Jan 3, 2019	In-store promotion	$30,000	Greater Phoenix CVB Arizona Office of Tourism	Activity Performance Productivity	New Expanded Ongoing

3.2.13 Production and Design

List the type of asset, the target audience for the asset, the quantity required, the distribution and the budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project. See example below.

Name/type of asset	Target Audience	Quantity	Distribution	Budgeted Cost	Types of Metrics	Status
Print Ad Production	Circulation of magazine	3	Magazines	$3,500	Activity Performance Productivity	New Expanded Ongoing

3.2.14 Other Marketing Activities and Projects

Provision is made for requests for funding pertaining to marketing activities which are not included in the categories listed above. Please provide a detailed description of the project and any support documentation pertaining to this project, as well as a budgeted cost. Remember to include the type of activity measures, performance measures and productivity metrics that will be used to determine the effectiveness of the project.

Name/type of project	Date(s)	Description	Budgeted Cost	Types of Metrics	Status
Guerilla Marketing	Nov 15, 2018 – Jan 3, 2019	In-market cut out boards	$50,000	Activity Performance Productivity	New Expanded Ongoing

3.3 **SECTION C** - Supporting Documentation – the following elements must be included:

- FY2018 Affidavit in Support of Application (Appendix A)
  - First time applicants are required to submit a copy of the DMO/community's FY2018 marketing budget with the FY2019 Affidavit in Support of Application.
- For regional submissions: Proof of all meetings with participating communities by submission of dated agenda and any other supporting documentation.
- For regional submissions: Letters of support from each participating community included in the application.
- Back-Up Documents for Work with Outside Vendors (i.e. media outlets, PR firms, website developers, research firms, etc.) – Examples of documentation can be scope of work, proposals, insertion orders, media plans, MOU's, contracts, other official agreements or bids.

3.4 Non-Fundable Expenses

- Employee salaries
- Entertainment and honorariums
- Food and beverages
- Equipment purchase and rental
- Promotional items, including but not limited to: prizes, trophies, plaques, decorations, trinkets, giveaways, hats, shirts, banners, flags, floats
- Items for re-sale
- Business directories of any kind (in ads, brochures, etc.)
- Program booklets, stationery, table tents, membership solicitation literature
- Travel expenses
- Postage and office supplies
- Donations
- Construction of permanent structures
- Building maintenance
- Anything contrary to state or federal law

3.5 Delivery Instructions:

One (1) typed, signed, hard-copy original Prop 302 application must be received by AOT no later than 5:00 p.m. **Friday, May 25, 2018**. Faxed, handwritten or emailed applications will not be considered. **Late and/or incomplete applications will not be accepted.**

FY2019 Prop 302 Maricopa County Marketing Application
Becky Blaine
Deputy Director
Arizona Office of Tourism
118 N. 7th Ave., Ste. 400
Phoenix, AZ 85007

4. Approval Process Guidelines

- Applications from eligible DMOs will be reviewed and evaluated by the Prop 302 Maricopa County Marketing Program Committee (Prop 302 Committee) which includes members of the accommodations and rental car industries, members of the Governor's Tourism Advisory Council and AOT's Director. AOT's Deputy Director, Assistant Deputy Director-Operations and Marketing Manager may provide technical assistance to the Committee as needed.

- Upon final Prop 302 Committee decision on the level of funding to be awarded, applicants will be notified in writing. The amount of funds awarded to approved applicants will be determined by the following:
  - The assurance of compliance with the intended purpose of the Marketing funding,
  - A review of gross hotel room sales for calendar year 2017 from the official municipal government for each applicant, (if this cannot be provided the community may provide an estimate with the methodology for calculating the estimate included.)
  - Quality of each application,
  - And, the review and discretion of the Prop 302 Committee.

Marketing Funding Process

- Following official notification of award, funding will be allocated to eligible Maricopa County recipients on a monthly basis. In keeping with the monthly funding system by which AOT receives the Prop 302 funds, each eligible Maricopa County recipient will receive funding equal to one-twelfth of their yearly projected Prop 302 Maricopa County Marketing funding no later than the last day of each month of FY2019.

Reallocation Procedure

- All funding allocated for FY2019 must be spent on approved marketing activities in FY2019. Any changes to Marketing Plan must be submitted in writing to Becky Blaine. Approvals from Prop 302 Committee to be provided in 7-10 business days.

5. Project Development Guidelines

Entities that are not able to follow the guidelines listed below for any given project must submit a written request for a waiver from AOT and the Prop 302 Committee.

5.1 Basic Guideline Requirements

- The primary focus of all Prop 302 Maricopa County Marketing Program projects must be to promote tourism and attract visitors from appropriate markets. It is also imperative to monitor and document its effectiveness
- Qualifying projects are limited to the creation and implementation or continuation of new or expanded marketing programs over and above programs that existed in FY2001.
- For each marketing program component submitted for funding, it is required to include the activity measures, performance measures and the productivity metrics.
- Program participants cannot transfer funds from one specific project to a different project **without prior written approval from AOT**.
- When placing paid media (advertising), publications/publishers should be chosen based upon the appropriate target audience.
- AOT's "Grand Canyon State" logo (below) is not required but is encouraged to be featured on all placements. The logo and the words "Grand Canyon State" must be legible. If the project is produced in four colors, AOT's logo should also be in four-color. Logos are available from AOT via e-mail or by download.

- Use of AOT call to action (below) is not required but is encouraged to be featured on all advertising wherever practical. The VisitArizona.com URL must be legible.

  "For statewide travel information, go to VisitArizona.com"

- The purpose of providing funding to Maricopa County DMOs/communities is to promote the individual city or town as a destination with a variety of tourism-related products and activities. Funding, therefore, should not be used to promote a single for-profit business.

5.2 Specific Guideline Requirements

5.2.1 Print Placement: Newspaper, Magazine

- "Arizona" must be spelled out in its entirety and prominently featured on all print media.
- The AOT "Grand Canyon State" logo and the VisitArizona.com URL are not required but encouraged to appear on all print ads.
- Production costs may be included as part of the budgeted cost of the placement, but should be listed under the 'production and design' section.

5.2.2 Outdoor Placement: billboards, busboards, etc.

- Billboard placements are allowed on interstates or major highways outside of Maricopa County.
- The AOT "Grand Canyon State" logo and the VisitArizona.com URL are not required but encouraged to appear on all outdoor placements and the logo should be legible from the adjacent roadway.
- Production costs may be included as part of the budgeted cost of the placement, but should be listed under the 'production and design' section.

5.2.3 Broadcast Placement: Radio, Television

- Radio and TV ads are required to include the word "Arizona" (for TV ads: written as well as spoken) and must reach outside of Maricopa County, preferably out-of-state.
- The AOT "Grand Canyon State" logo and the VisitArizona.com URL are not required but encouraged to appear on all television ads.
- Production costs may be included as part of the budgeted cost of the placement, but should be listed under the 'production and design' section.

5.2.4 Digital Media: Banner Ads, Mobile Applications, Web Sponsorships, Paid Social Media

- Digital advertising is not required but is encouraged to promote a website that features the AOT call to action on the home page of the site.
- The home page of the website being promoted is not required but is encouraged to link to AOT's website: http://www.visitarizona.com

5.2.5 Website Development/Enhancement

- Funding is available for the development of a new tourism site or the enhancement of a current site. All sites are not required but are encouraged to have the AOT call to action on the home page and should provide a link on the home page to AOT's website: http://www.visitarizona.com

- Information on these sites is restricted to tourism promotion. A chamber of commerce's website shall not include information on chamber meetings, membership benefits and other non-tourism related information.

5.2.6 Printed Material: Brochures, Maps, Travel Trade Guides, etc.

- The word "Arizona" must be prominently featured on the front and the AOT "Grand Canyon State" logo and the visitarizona.com URL are not required but encouraged to be prominently featured on the front or back page.
- Printed literature must include the DMO's complete address, phone number with area code. It is also a requirement to include the quantity and date printed. For example: (10,000-09/08).
- A majority of the distribution must be outside of the applicant's geographical area. An explanation detailing where, through what channels and in what quantity the brochures will be distributed must be included in the application.
- Highway maps should reflect a geographical outline and provide direction and distances to the traveler.
- If a contract distribution service is requested, also include terms and extent of contract.
- All publications distributed in foreign countries should also include the words "Printed in USA," a West coast map of the United States highlighting Arizona, a temperature chart (if included) in Celsius degrees, mileage converted to kilometers and address listing with city, state, zip code and "USA." (Do not use toll-free numbers, such as 800, 888, etc. that are not accessible in international markets)

5.2.7 Audio-Visual: Film, Video, DVD/CD etc.

- These must be intended as promotional pieces designed primarily to attract non-resident visitors and appeal to more than just local residents.
- Film and video productions are not required but are encouraged to include the AOT "Grand Canyon State" logo and the visitarizona.com URL.

5.2.8 Travel Shows: Booth Space, Registration Fees, and Literature Shipping

- Booth space includes the cost of allotted space as outlined by the travel show contract. This does not include electricity, food and beverage, or other services within the booth.
- Literature shipping cost is restricted to the commercial freight expense incurred to transport printed materials to designated travel shows.
- Rental or construction costs of the booth itself will not be funded.
- Funding is not available for accommodations, entertainment, food and beverages, rental car expenses or any other travel costs.

5.2.9 Media Communications and Public Relations

- Funding is available for contracted PR services/project. Funding may not be used towards administration of agency. A detailed explanation of the planned activities must be provided with the application. Once a contractor has been selected, a copy of the contract must be sent to AOT.

5.2.10 Event Sponsorships

- Funding is available for event sponsorships which benefit Maricopa County. Entities applying for funding for event sponsorships should provide a brief description of the event to be sponsored and the media coverage and value to accompany the sponsorship.

5.2.11 Research and Strategic Planning

- Applicants may use up to 10 percent of their Prop 302 fiscal year allocation for approved and contracted research and strategic planning. Applicable projects may include visitor profile research,

SWOT analyses, feasibility studies, conversion studies, etc. A detailed description of the project, proposed methodology and scope of work must be included in the application.

5.2.12 Co-operative Programs

- Submitting DMOs are encouraged to participate in co-op projects using Prop 302 funding in FY2019. A detailed description of the project and a list of participating DMOs/communities must be included in the application.

5.2.13 Production and Design

- These must be intended as promotional pieces designed primarily to attract non-resident visitors and appeal to more than just local residents.
- Production assets are not required but are encouraged to include the AOT "Grand Canyon State" logo and the visitarizona.com URL.

6. Project Modification and Withdrawal Guidelines

- Any *changes* to the categories of projects detailed on the application will not be considered as eligible expenses unless prior approval is requested in writing and granted by the Prop 302 Committee.
- AOT must be notified in writing immediately and no later than March 22, 2019 if the applicant does not plan to spend any portion of the FY2019 Prop 302 Maricopa County Marketing Program funding on its approved project(s) within FY2019. Failure to do so will strongly impact future funding. Any unused funds must be returned to AOT to be reallocated to the marketing program for the following fiscal year.

7. Expense Reporting Guidelines

To facilitate the continuation of Prop 302 Maricopa County Marketing Program funding for subsequent fiscal years, AOT requires all marketing participants to submit both a **mid-year expense report** and a **year-end expense report**.

Mid-year expense reports in hard copy form should be submitted in the format provided below:

7.1 Section A. Applicant Information

- Complete the information from the original application, noting any change.

7.2 Section B. Projects Funded

- Identify each activity under the appropriate project heading (see pages 3-6). A fundable item is one that has been pre-approved by AOT from the original application or has received approval for change, and that was performed according to Prop 302 Maricopa County Marketing Program Guidelines.
- Indicate dollars spent - i.e. the amount DMO/community paid to accomplish this item. Please use the same terminology as was used in the original application to describe the items.

For each item listed in Section B, the following documentation must be included with your expense report:

1. Proof of Charge from Vendor: Submit legible invoice, contract or insertion order copies reflecting date, description and dollar amount.

Year-end expense reports in hard copy form should be submitted in the format provided below:

7.3 Section A. Applicant Information

- Complete the information from the original application, noting any change.

7.4 Section B. Projects Funded

- Identify each activity under the appropriate project heading (see pages 3-6). A fundable item is one that has been pre-approved by AOT from the original application or has received approval for change, and that was performed according to Prop 302 Maricopa County Marketing Program Guidelines.
- Indicate dollars spent - i.e. the amount DMO/community paid to accomplish this item. Please use the same terminology as was used in the original application to describe the items.

For each item listed in Section B, the following documentation must be included with your expense report:

2. Proof of Charge from Vendor: Submit legible invoice copies reflecting date, description and dollar amount.

3. Proof of Payment: include a copy of cancelled check and payment receipt from the vendor.

4. Proof of Implementation: Submit proof that the activity was performed.
   Evidence can include items such as:
   - Ad placement tear sheets (verifying date and name of publication)
   - Insertion orders
   - Contract or comparable document from the third-party vendor
   - Copies of audio or video created
   - Invoice indicating actual broadcast times and dates
   - Actual printed materials
   - Trip reports from trade shows
   - Billboard photographs showing content
   - Copies of press releases
   - Research reports

7.5 Section C Total Spent

Indicate the total dollar amount of all fundable expenses.

7.6 Section D Signatures

Expense reports must be signed by both the Project Coordinator and the Administrative Official as submitted in the original application.

7.7 Deadlines for Expense Reports

Mid-year reports for FY2019 must be received by AOT no later than January 28, 2019 and shall cover activities performed during the months of July 2018 through December 2018.

Year-end expense reports for FY2019 must be received by AOT no later than July 26, 2019 and shall cover activities performed during the months of January 2019 through June 2019.

No extensions will be granted. Failure to provide expense reports will jeopardize current year funding allocations and any future funding.

Note: Due to the complex nature of these expense reports, AOT requests that each applicant submit a well-organized expense report following the order of Sections A-D as noted above.
In Section B, each applicant should include an invoice, copy of the corresponding check and cancelled check and the proof of implementation in chronological order matching each item listed on the expense report. Additionally, if media charges exceed Prop 302 allocated funds, please note difference within each expense submission.

Example: total media charge = $125,000, invoice charges total $130,000. Applicant shall note amount allocated to Pro 302 funding and amount paid for by other funding.

8. Project Evaluation Guidelines

At the end of FY2019, each Prop 302 Maricopa County Marketing Program participant is required to prepare and submit a project evaluation. This information is used to compile pertinent data regarding the effectiveness of the project and the Marketing program as a whole. The below format should serve as the guideline for your evaluation. Use these standard categories in the standard Excel format when submitting your evaluation. The results will represent all activity within each medium, where applicable. When possible, the economic impacts and benefits to the community as a result of those marketing efforts should be included.

Completed evaluations must be received no later September 20, 2019.

8.1 Print Placement

Number of Placements	Gross Impressions	Flight Dates	Phone Inquiries	Web Inquiries	% YOY Increase Inquiries	Economic Impact	Total Spend

8.2 Broadcast Placement

Number of Placements	Gross Impressions	Flight Dates	Phone Inquiries	Web Inquiries	% YOY Increase Inquiries	Economic Impact	Total Spend

8.3 Outdoor Placement

Number of Placements	Gross Impressions	Flight Dates	Phone Inquiries	Web Inquiries	% YOY Increase Inquiries	Economic Impact	Total Spend

8.4 Digital Media

Gross Impressions	Site Visits	Page Views	Bounce Rate	Average Time on Site	Average CTR	Web Inquiries	% YOY Increase Inquiries	Total Spend

8.5 Website Development/Enhancement

Website Address	% Increase Length of User Session	% Increase Web Traffic	Enhancement Benefit	Total Spend

8.6 Printed Material

Name/type of printed material	Area of Distribution	Quantity Produced	Phone Inquiries	Web Inquiries	% YOY Increase Inquiries	Economic Impact	Total Spend

8.7 Travel Shows

Number of Shows	Number People Met With	Leads	Collateral Distributed	Requests for Guides	Total Spend

8.8 Audio Visual

Name/type of audio visual material	Area of Distribution	Quantity Produced	Phone Inquires	Web Inquires	% YOY Increase Inquires	Economic Impact	Total Spend

8.9 Media Communications and Public Relations

Number Shows/Missions	Media Calls	Placements	Total Circulation	Advertising Equivalency	% YOY Increase Ad Equivalency	Total Spend

8.10 Event Sponsorships

Number Sponsored Events	Reach	Number Press Releases	Phone Inquiries	Web Inquiries	% Increase in Hotel Rooms	Total Spend

8.11 Research and Strategic Planning

Research Projects Conducted	Research Use	Benefit to Community	Total Spend

8.12 Co-operative Programs

Please use appropriate format above for media utilized.

8.13 Production and Design

Name/type of material	Area of Distribution	Quantity Produced	Phone Inquires	Web Inquires	% YOY Increase Inquires	Economic Impact	Total Spend

8.14 Other Marketing Activities and Projects

Please use appropriate format above for media utilized.

9. Failure to Comply

Failure to comply with any of the above guidelines may impact the amount of Prop 302 Maricopa County Marketing Program funding for the current year and/or future years for the participant found in non-compliance. The penalties imposed are at the determination of the Prop 302 Maricopa County Marketing Program Committee.

10. Further Assistance

If further information or assistance is needed, please contact the Prop 302 Maricopa County Marketing Program Administrator:

Becky Blaine
Deputy Director
Arizona Office of Tourism
118 N. 7th Ave., Ste. 400
Phoenix, AZ 85007
Telephone Number: 602.364.3696
Fax Number: 602.364.3702
E-mail: bblaine@tourism.AZ.gov

Prop 302 Maricopa County Marketing Program
FY2019 Affidavit in Support of Application

The undersigned authority, _____, on this day personally appeared before me (Name of Administrative Official) and is known to me to be the person whose name is subscribed to the following instrument, and having been duly sworn, upon oath, deposes and states as follows:

I have prepared this affidavit at the request of The Arizona Office of Tourism for the purpose of making an application for a public benefit or privilege. I hereby certify that I am a duly authorized representative of the DMO/community identified below with the principal address as follows:

DMO/Community:_____

Address: _____

_____

_____

If applying as a DMO provide the year of designation _____

The amount of DMO/community's annual FY2019 tourism marketing budget is: $_____ *

The amount requested from the Prop 302 Maricopa County Marketing Program is: $_____

The gross hotel room sales within the organization's municipal boundaries for calendar year 2017 was $_____

I further certify that the above referenced organization is recognized as the official destination marketing organization by a city, town or other political subdivision within Maricopa County, Arizona. I recognize that pursuant to Arizona Law, perjury constitutes a class 4 felony under A.R.S. Sec 13-2702 and a false swearing constitutes a class 6 felony pursuant to A.R.S. Sec 13-2703.

I declare the foregoing is complete and correct.

Executed this _____ day of_____, 20_____ in _____, Arizona.

_____ _____
(Signature of Administrative Official) (Title)

Subscribed and sworn to before me this ____ day of _____, 20____ to certify which witness my hand and seal of office.

_____
NOTARY PUBLIC
***First time applicants are required to submit a copy of the organization's FY2019 marketing budget with the FY2019 Affidavit in Support of Application.**

Arizona Office of Tourism

Rural & Tribal Marketing Cooperative - FY2019

Section 5

ARIZONA
OFFICE OF TOURISM

RURAL & TRIBAL MARKETING COOPERATIVE

FISCAL YEAR 2019

- **CONTRIBUTION ALLOCATIONS**
- **PROGRAM GUIDELINES**

100 N. 7th Ave, Suite 400, Phoenix, AZ 85007 ♦ [P] 602.364.3700 [F] 602.364.3702
Douglas A. Ducey, Governor ♦ Debbie Johnson, Director
Business - Tourism.az.gov ♦ Travel Information - VisitArizona.com

ARIZONA OFFICE OF TOURISM

The Rural & Tribal Marketing Cooperative
Fiscal Year 2019

Co-op Partners	Total Contributed
City of Apache Junction	$ 3,050.00
City of Benson Visitor Center	$ 2,829.50
City of Bisbee	$ 2,829.50
City of Prescott	$ 49,819.50
City of Sierra Vista	$ 41,150.50
City of Williams	$ 49,413.00
Cochise County Tourism Council	$ 48,212.00
Copper Corridor Economic Development Coalition	$ 3,390.50
Cottonwood Chamber of Commerce	$ 49,939.00
Flagstaff Convention & Visitor's Bureau	$ 39,964.35
Globe-Miami Regional Chamber of Commerce	$ 9,903.00
Grand Canyon Chamber & Visitors Bureau	$ 49,036.50
Hopi (Experience)	$ 6,735.00
Kingman Visitor Center	$ 49,847.50
Lake Havasu City Convention & Visitors Bureau	$ 49,925.00
Navajo Tourism Department	$ 28,639.50
Oracle's Womens Network	$ 3,000.00
Page Lake Powell Tourism	$ 37,401.00
Parker Regional Chamber of Commerce & Tourism	$ 4,122.00
Salt River Pima-Maricopa Indian Community	$ 29,444.28
Sedona Chamber of Commerce	$ 34,821.35
Superior Chamber of Commerce	$ 7,310.50
Town of Clarkdale	$ 2,500.00
Winslow Chamber of Commerce	$ 9,600.00
Yuma Visitors Bureau	$ 38,314.80
Total Partner Contributions	**$ 651,198.28**

AOT Partner Match	$	651,198.28
Additional AOT Contribution (Anchor Ads, OMA Hours, and Commission)	$	348,801.72
Total AOT Budget	$	1,000,000.00
Total Co-op Spend	$	1,651,198.28

The Rural Marketing Cooperative Program Fiscal Year 2019

Guidelines and Instructions

Due Date: Applications must be received at the AOT office no later than

5:00 p.m. Friday, June 29, 2018

OFFICE LOCATION:
Arizona Office of Tourism
118 N. 7th Ave., Suite 400
Phoenix, AZ 85007

AGENCY CONTACTS:
Jamie Daer – Director of Advertising
P - 602-364-3783
E - jdaer@tourism.az.gov

Diego Cando - Community Marketing Manager
P - 602-364-3725
E – dcondo@tourism.az.gov

TABLE OF CONTENTS

Program Purpose……...1

Program Description 2

Subsidized Rate 3

Program Eligibility 4

Media Plan.....5

Application Instructions.....6

Ad Placement Requirements.....9

Project Effectiveness.....10

Attachments: ……11

A – The Rural Marketing Cooperative FY 2019 Application

Section A - Applicant Administrative Information

Section B - FY 2019 Affidavit in Support of Application

ARIZONA OFFICE OF TOURISM
The Rural Marketing
Cooperative FY 2019

1. Program Purpose

The Rural Marketing Cooperative is administered by the Arizona Office of Tourism (AOT) for the purpose of expanding travel and tourism related activities in communities throughout Arizona. It provides a means for eligible participants, (rural destination marketing organizations (DMOs), tribal entities, statewide tourism associations, and regional tourism partnerships), to participate in the following marketing opportunities:

- Packaged digital media buys, out-of-home and online
- Shared opportunities in Arizona sections developed by AOT
- Individual ad placements in selected media
- AOT marketing opportunities include but are not limited to the following;
    - Arizona Official State Visitor's Guide (OSVG)
    - e-Newsletters
    - VisitArizona.com
    - Trade and media missions
    - Sponsorships
    - Ad/banner production
    - Added Value

AOT works with media representatives to negotiate rates, and eligible participants receive rates subsidized at fifty (50) percent of the negotiated rate.

The Rural Marketing Cooperative includes an AOT campaign, which in addition to participant ads, features AOT placements in the selected media. The campaign drives traffic to ExploreMoreAZ.com where the co-op participants are featured. AOT also features co-op participants throughout the campaign in advertorials.

AOT led trade and media missions provide co-op participants with public relations opportunities in domestic and international markets. AOT also invites co-op participants to join us in consumer activations. Participants will receive fifty (50) percent off the registration cost, but will be solely responsible for all travel costs.

The opportunities included in the Rural Marketing Cooperative allow participants to leverage their resources in partnership with AOT. As a result, participants can work with AOT's in-state, national and international marketing efforts to sustain Arizona's tourism industry.

2. Program Description

The Rural Marketing Cooperative offers a variety of strategic media and AOT partnership opportunities. Participants can participate at many different levels. The media plan combines print, outdoor and online placements, along with packaged co-op media placements. All of the media options align with the campaign's target markets.

Below is a brief description of each of the offerings included in the Rural Marketing Cooperative.

Packaged Digital Media - Participants can select from geo and behavioral targeted online media packages, using a variety of sites and networks to maximize effectiveness. Options include digital display (behavioral and contextual), search marketing, retargeting and more.

Shared Opportunities – Participants can buy into publisher inserts and selections, which will have AOT branding, and include participants' ads and advertorial.

Individual Ad Buys - Participants can choose to place ads in pre-selected print and out-of-home media. Most of these placements will be stand-alone placements, however a few print publications may group the ads into a publisher designed Arizona section. Total Individual Ad Buys shall not exceed **$15,000** half net rate.

Trade and Media Mission - Participants have the opportunity to join AOT's Trade and Media team at events in international markets.

Sponsorships – Participants can have the opportunity to buy into specific AOT sponsored events.

Ad/Banner Production – Participants can choose to work with a graphic designer to produce shelf print and banner ads.

Value Add – Participants can choose to work with AOT and Off Madison Avenue and take advantage of available opportunities on AOT owned media/marketing channels.

3. Subsidized Rates

AOT will subsidize rates at fifty (50) percent of total rate for qualified co-op participants.

3.1 Individual Ad Buys shall not exceed $15,000 half net rate.

3.2 There is a $50,000 cap* for Shared Opportunities, Packaged Digital Media, Trade and Media Missions and Sponsorships, and each opportunity has limited participation.

***Subsidized rates for the Rural Marketing Cooperative are contingent upon AOT's FY 2019 budget.**

4. Program Eligibility

Rural destination marketing organizations (DMOs), tribal entities, statewide tourism associations (e.g., the Arizona Dude Ranch Association) and regional tourism partnerships meeting the criteria in this section are eligible. Please read the eligibility criteria thoroughly.

4.1 Applicants must meet the criteria of at least one of the following four categories in order to be eligible for subsidized rates:

4.1.1 An Arizona based rural Destination Marketing Organization (DMO). A DMO is defined as an incorporated not-for-profit organization or governmental unit that is responsible for the tourism promotion and marketing of a destination on a year-round basis. Only one DMO can participate per city, town or region. Rural DMOs are defined as any DMO located outside Pima and Maricopa Counties.

4.1.2 A tribal entity that wishes to market existing tourism attractions and tourism facilities.

4.1.3 An Arizona based statewide tourism association that represents entities that rely on tourism-related business for a majority of their income.

4.1.4 An Arizona based regional partnership which consists of a minimum of three (3) DMOs that promote a minimum of three (3) communities as a single regional tourist destination; the number of rural or tribal DMO participants must be equal to or greater than the number of urban DMOs. For example, if a regional partnership consists of three (3) DMOs, two (2) must be rural or tribal. Only one regional partnership can participate per region. Regions are not limited to those marketing regions previously identified by AOT for promotional purposes. Each regional participant must be the designated DMO for its respective community. Regional partnerships must have a tourism website or micro-site that promotes each regional participant in an equitable manner.

And

4.2 Applicants must be exempt from federal income tax under section 501(c)3 or 501(c)6 of the Internal Revenue Code. Applicants shall not use the 501(c)3 or 501(c)6 status of another organization. Tribes and municipalities are exempt from the 501(c)3 or 501(c)6 status requirement as they are government.

And

4.3 Applicants must have a tourism website or micro-site to use as the call to action and a fulfillment piece.

DMOs that do not qualify for this program are still eligible to participate with AOT on co-op marketing opportunities but will not be eligible for the subsidy.

5. Media Plan

AOT has developed a comprehensive media plan backed by AOT research and participant insight. The media placements are geo-targeted to the markets listed below. Refer to Attachment A, Section B, and Attachment C for a list of selected media pricing and profiles.

The Rural Marketing Cooperative is a rural Arizona-focused co-op program that utilizes a media plan designed to attract visitors from major metropolitan areas in Arizona, drive as well as long-haul Domestic and International markets. The fiscal year 2019 program will run from September 1, 2018 – August 31, 2019, and features a media plan focused on attracting the following:

Target Markets:

- Arizona: Phoenix and Tucson
- Domestic: National, Chicago, Las Vegas, and Southern California (LA & San Diego)
- International: Canada, Germany and United Kingdom

Target Audiences:

- Baby Boomers
  - Adults 45-64
  - HHI: $50,000+, emphasis on $75,000+
- Gen X
  - Adults 35-44
  - HHI: $50,000+, emphasis on $75,000+

AOT will place ads in Shared Opportunities along with participants and participate in packaged digital media options that meet the three (3) participant minimum participation guideline. AOT will also conduct a seasonal campaign to support the coop participants and drive visitation throughout Arizona. AOT ad placements will direct visitors to ExploreMoreAZ.com. The landing page will feature participants and give visitors the opportunity to click through to the sites.

6. Application Instructions

Each entity may submit a maximum of two applications. If an entity submits two applications, one must be a regional partnership.

The application must include all information outlined in Sections A, B and C below.

A. Applicant Administrative Information - the following information must be included in the Rural Marketing Cooperative application.

6.1.1 Entity Name: The name of the applicant must be the same as it appears on the incorporation, federal tax exemption or the state charter.

6.1.2 Physical Address: Provide a street address (no P.O. Boxes) for deliveries.

6.1.3 Mailing Address: Provide a mailing address that can be used by AOT for routine correspondence.

6.1.4 County: Identify the county in which the applying organization is located. In the case of regional applications, list all counties included under the application.

6.1.5 Project Coordinator's Name and Title: The person responsible for administering the project and the day-to-day contact for AOT. This individual is also responsible for submitting all necessary documentation throughout the year-long effort of this project and must be familiar with the specifics of the Rural Marketing Cooperative, as well as the application submitted. Provide the Project Coordinator's telephone number, fax number, and e-mail address.

6.1.6 Provide the tourism website that will be promoted in advertisements. Regional partnerships must have a website that promotes the region and each participant in an equitable manner.

6.1.7 The fulfillment piece is the tourism brochure or visitor guide that will be mailed to people that inquire about the destination. Regional partnerships must have a fulfillment piece that promotes the region and each participant in an equitable manner.

6.1.8 Refer to Section 4.1.4 for information on Regional Partnerships. List all Regional Participants in the designated box.

6.1.9 Signatures: The signatures on the application certify that the information on the form is correct to the best of the signatories' knowledge, and authorizes the participation in the Rural Marketing Cooperative for FY 2018. Applications must bear the signatures of the Project Coordinator and the Administrative Official (the person authorized to commit the applicant to funding requested co-op opportunities). Both signatures are required to process the application. In some cases the Project Coordinator and the Administrative Official will be the same person.

B. The Rural Marketing Cooperative Opportunity Selection Sheet

The Rural Marketing Cooperative allows participants to leverage their resources in partnership with AOT; and for eligible participants to receive subsidized rates of fifty (50) percent for all pre-selected marketing opportunities listed on the Rural Marketing Cooperative Opportunity Selection Sheet (separate Excel spreadsheet).

The following outlines the process for making the Rural Marketing Cooperative selections:

6.2.1 Download the Excel version off the Opportunity Selection Sheet at https://tourism.az.gov/marketing-programs/partnership-opportunities and save the file to your computer.

6.2.2 When opening the file, you will need to ensure to "**Enable Macros**."

6.2.3 The Opportunity Selection Sheet will have multiple tabs down at the bottom. The first being an overview of all your selection costs and the rest are the available selections per market opportunity.

6.2.4 Fill out the "Opportunity Selection Box" of the opportunities you wish to participate in. Participants shall select only one level of participation per opportunity; for example, if you choose *Sunset* magazine for March 2019, only one ad size can be selected.

Opportunity Selection Box:	Placement	Level (drop-down menu)	# of Months (drop-down menu)	Which Months	Half Net Rate (drop-down menu)	Total Partner Cost
	AZDailyStar					$0.00

6.2.5 You will want to make sure to fill in all of the grey boxes within the "Opportunity Selection Box." A drop-down menu is available for almost all options, except for "Which Months," in which you will need to manually type in the months you would like to advertise, if that field is applicable.

6.2.6 Once the "Opportunity Selection Box" has been completed properly, the total participant cost will appear in the right hand column and will also be added to your media spend total on the "Full Cost Overview" tab.

6.2.7 Please ensure to review all minimum requirements per advertising opportunity called out in red. If minimums are not met, we will notify you with additional options.

6.2.8 Depending on the version of Excel you are using, you may need to save your file differently. If needed, you can go to File —> Save As —> Format —> Select: Excel Macro-Enabled Workbook or .xlsm to save your selections before returning the file to AOT

6.2.9 **Save the file after filling in all your selections, and email it along with the Application form and Affidavit(s) to Jamie Daer at jdaer@tourism.az.gov.**

6.2.10 Selections will be awarded by AOT based on the availability of funds and availability of each opportunity. **Be aware that all applicants may not receive every marketing opportunity requested**.

6.2.11 Select ad opportunities are limited due to space. If space limitations are exceeded, participants will be selected by lottery.

6.2.12 Trade and Media missions have limited space. Applicants must demonstrate their commitment to participate by identifying the attendee, reserving the dates, and budgeting for travel and related costs. If space limitations are exceeded, participants will be selected by lottery.

Note: Publication costs identified on the Rural Marketing Cooperative Program Opportunity Selection Sheet are listed as net rates for all media placements. Participants will be **billed directly by the publisher** at half the net insertion cost.

Due to the specific nature of the Rural Marketing Cooperative, once opportunities are approved, no changes or cancellations are allowed unless a publication or marketing opportunity is cancelled.

C. Supporting Documentation

6.3.1 Signed FY 2019 Affidavit in Support of Application must be included (Attachment B). Applications submitted as a regional partnership must include a separate signed affidavit from each regional participant.

6.3.2 Fulfillment piece that will be used for the destination in FY 2019. A fulfillment piece must be provided upon request.

Application forms are available online at https://tourism.az.gov/marketing-programs/partnership-opportunities. **The application forms must be completed and signed, and received by AOT via email at jdaer@tourism.az.gov, no later than Friday, June 29, 2018 by 5:00 p.m.** Please contact Jamie Daer, at the aforementioned email address, if you have any questions or concerns about the application process.

Late applications will not be accepted. Incomplete applications will be ineligible.

7. Ad Placement Requirements

7.1 All ads must be received by AOT for preview prior to the material deadline identified in the Rural Marketing Cooperative Opportunity Profiles. Please e-mail the ad to Aaron Lim, Creative Service Manager at alim@tourism.az.gov. AOT approval for all ad creative is mandatory and may take up to five (5) business days from the date of receipt.



7.2 Participant ads must include their logo, AOT brand mark/website (see above) on all print and digital placements unless the size of the digital placement (small banners/mobile banners) will not support two logos.

7.3 If an ad is placed without prior AOT review/written approval, AOT will not be responsible to pay any portion of the ad cost. The full advertisement cost will be the responsibility of the Rural Marketing Cooperative participant.

7.4 Inclusion of the AOT brand mark/website is required on all participant websites. Please see 7.2 for AOT brand mark and website information.

Project Effectiveness

During FY 2019, AOT shall require each participant of the Rural Marketing Cooperative to assess the project's effectiveness by completing a mid-year progress report in January 2019, and a final report in September 2019. This information will be used to compile pertinent data regarding the effectiveness of each media buy and the program as a whole. The reports will be collected through an online survey. The following information is required:

- Corresponding metrics including but not limited to: unique visits to the website, requests for information, and visitation (lodging, visitor center, attractions, and/or events).

  The final report will also include questions assessing the satisfaction and effectiveness of the program.

ATTACHMENTS

Attachment A, Section A

The Rural Marketing Cooperative
FY 2019 Application

- A complete and signed application must be emailed to, and received by, AOT no later than 5:00 p.m. Friday, June 29, 2018.
- Incomplete and/or faxed applications will not be accepted.

Section A: Applicant Administrative Information

1. Entity Name: _____

   Doing Business As (if different from above) _____

2. Physical Address: Street:_____ City:_____ State: AZ Zip Code:_____

3. Mailing Address (if different): PO Box:_____ City:_____ State: AZ Zip Code: _____

4. County (list all represented if regional applicant): _____

5. Project Coordinator's Name and Title: _____

   Telephone Number:_____ Fax Number:_____ E-mail: _____

6. Destination Website: _____

7. The applicant has a current fulfillment piece for the destination. ☐ Yes

8. Is this application being submitted for a regional partnership? ☐ Yes ☐ No

   If Yes, list all participants contributing to the regional Rural Marketing Cooperative effort starting with the lead applying entity. Note: A regional partnership must be comprised of at least three (3) DMOs and **each entity must sign and attach an affidavit in support of application, (Attachment B).**

List Regional Partners:

9. Two signatures are required in order to process this application.

Signature_____ Date: _____
(Project Coordinator)

Printed Name:_____ Title: _____ Organization: _____

Signature_____ Date: _____
(Administrative Official)

Attachment A Section B

Attachment A Section B

ARIZONA
OFFICE OF TOURISM

The Rural Marketing Cooperative
FY 2019 Affidavit in Support of Application

I am submitting this completed affidavit at the request of The Arizona Office of Tourism for the purpose of making an application for a public benefit or privilege. I hereby certify that I am a duly authorized representative of the organization identified below with the principal address as follows:

Organization: _____

Physical Address: _____

Amount contributing to the Rural Marketing Cooperative $ _____

Source of funding: _____

REGIONAL PARTNERSHIPS MUST SUBMIT A SEPARATE, SIGNED AFFIDAVIT FOR EACH REGIONAL PARTICIPANT

I further certify that the above referenced organization is one of the types of organizations listed below: (Please check the appropriate box)

- ☐ An organization recognized as the official destination marketing organization by a city or town.
- ☐ A Tribal entity promoting tourism.
- ☐ An Arizona based statewide tourism association.

I recognize that pursuant to Arizona Law, perjury constitutes a class 4 felony under A.R.S. Sec 13-2702 and a false swearing constitutes a class 6 felony pursuant to A.R.S. Sec 13-2703.

_____ _____
(Signature of Administrative Official) (Printed Name)

Title: _____

Arizona Office of Tourism

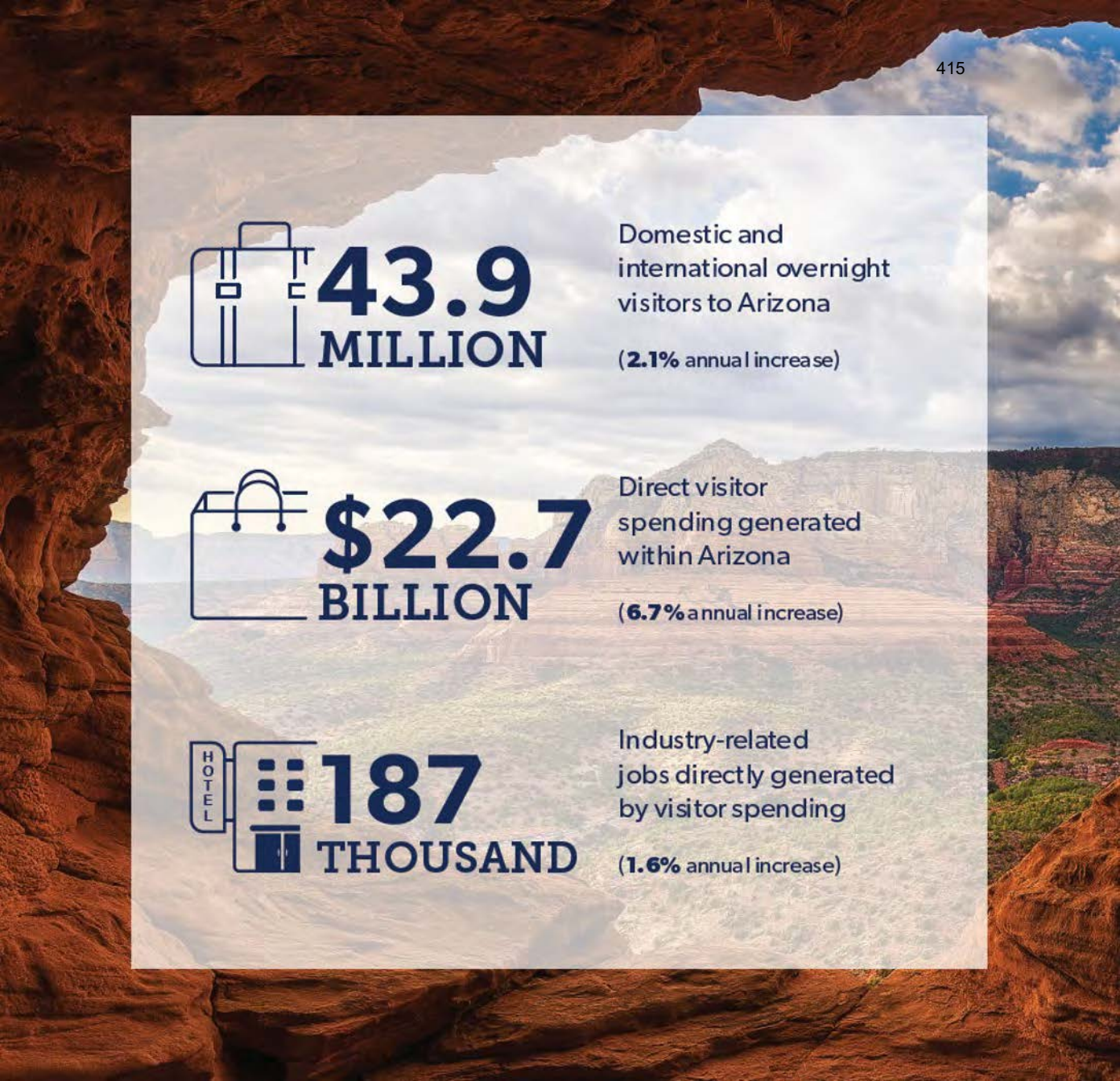
2018 Industry Figures Report

Section 6

ARIZONA
OFFICE OF TOURISM



2018 INDUSTRY FIGURES REPORT


43.9
MILLION
Domestic and international overnight visitors to Arizona
(2.1% annual increase)
$22.7
BILLION
Direct visitor spending generated within Arizona
(6.7% annual increase)
HOTEL
187
THOUSAND
Industry-related jobs directly generated by visitor spending
(1.6% annual increase)



$6.9 BILLION

Earnings generated by Arizonans employed by tourism

(**6.6%** annual increase)



$3.37 BILLION

Local, state and federal tax revenues generated by direct visitor spending

(**9.0%** annual increase)

VISITOR PROFILE

38.3 MILLION Domestic Overnight Visitors
(2.5% annual increase)

Top Origin States

01 Arizona — 10.7 MILLION
02 California — 7.4 MILLION
03 Texas — 1.7 MILLION
04 Colorado — 1.6 MILLION
05 Illinois — 1.4 MILLION
06 New York — 1.3 MILLION

5.56 MILLION International Overnight Visitors
(-1.9% total annual decrease; 1.5% overseas visitation annual increase)

Top Origin Countries

01 Mexico — 3.6 MILLION
02 Canada — 894 THOUSAND
03 Germany — 130 THOUSAND
04 United Kingdom — 115 THOUSAND
05 France — 103 THOUSAND
06 China — 81 THOUSAND

VISITOR IMPACT

$22.7 BILLION Dollars Generated by Visitor Spending
(6.7% annual increase)

Visitor Impact by Country



County Visited		Visitor Spending	# Jobs Created	% Travel-Related Jobs
1	Apache	$106 M	1,650	5.8%
2	Cochise	$304 M	3,630	6.9%
3	Coconino	$1.4 B	13,200	15.3%
4	Gila	$285 M	2,940	13.9%
5	Graham	$56 M	880	7.2%
6	Greenlee	$12 M	110	2.1%
7	La Paz	$142 M	1,350	16.8%
8	Maricopa	$11 B	101,660	3.9%
9	Mohave	$541 M	7,040	10.0%
10	Navajo	$312 M	4,110	9.8%
11	Pima	$2.4 B	25,500	4.9%
12	Pinal	$617 M	7,090	7.6%
13	Santa Cruz	$231 M	2,100	10.2%
14	Yavapai	$800 M	9,400	9.3%
15	Yuma	$588 M	6,400	7.2%

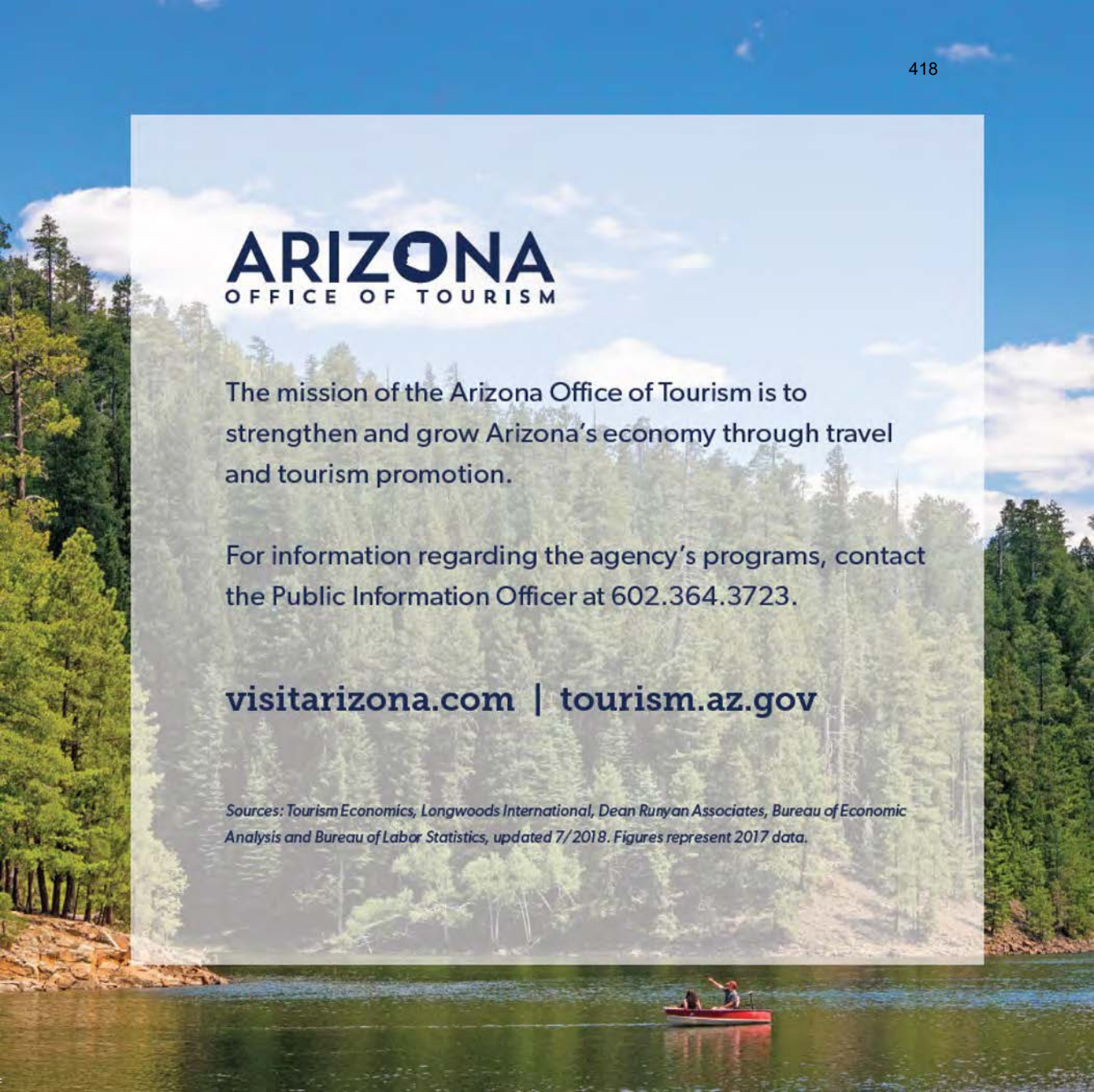
$3.37 BILLION Dollars in Tax Revenue
(9.0% annual increase)

Tax Revenue Breakdown

Federal — $1.4 BILLION — 42%
State — $932 MILLION — 28%
Local — $1.0 BILLION — 30%

$1,293

Taxes generated by tourism reduces Arizona households' average annual tax burden by nearly $1,300.


ARIZONA
OFFICE OF TOURISM
The mission of the Arizona Office of Tourism is to strengthen and grow Arizona's economy through travel and tourism promotion.
For information regarding the agency's programs, contact the Public Information Officer at 602.364.3723.
visitarizona.com | tourism.az.gov
Sources: Tourism Economics, Longwoods International, Dean Runyan Associates, Bureau of Economic Analysis and Bureau of Labor Statistics, updated 7/2018. Figures represent 2017 data.

Arizona Office of Tourism Arizona

Official State Visitor's Guide - 2018

Section 7

ARIZONA

THE GRAND CANYON STATE | OFFICIAL STATE VISITOR'S GUIDE



4 HISTORIC LODGING GEMS

AN A TO Z GUIDE TO AMERICAN INDIAN TRIBAL LANDS

TREK THE ARIZONA TRAIL

A ROUTE 66 ROAD TRIP

PLUS

Sites for Science
Off-Road Adventures
Regional Activities
Annual Events
Maps

COMPLIMENTARY COPY

ARIZONA
THE GRAND CANYON STATE

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Want to fall in love with Arizona? This is your dating app.



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It's like your own personal travel guide in the palm of your hand.

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GET IT ON Google Play

Download on the App Store

ARIZONA
THE GRAND CANYON STATE

ARIZONA
THE GRAND CANYON STATE

ARIZONA 2018 OFFICIAL STATE VISITOR'S GUIDE

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118 N. 7th Ave., Ste. 400
Phoenix, Arizona 85007
(602) 364-3700
fax: (602) 364-3702

VisitArizona.com provides information on travel throughout the state.
See pages 99–100 for visitor center locations.
Call (602) 364-3725 for bulk orders of the guide.

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Greetings from the Grand Canyon State.

Arizona is one of the most spectacular travel destinations in the world. The state's iconic natural beauty—such as the red rocks of Sedona, the sandstone spires of Canyon de Chelly, and the majestic buttes of Monument Valley—inspires travelers from all walks of life.

The *Arizona Official State Visitor's Guide* is a wonderful resource for planning a trip here. This guide will introduce you to Arizona's national parks and monuments, its historic landmarks and museums, its American Indian communities, its award-winning state parks, and much more.

When you embark on your Arizona expedition, take some time to stroll through a few of our character-filled small towns and century-old main streets. Explore trails lined with Ponderosa Pines, quaking aspens, or towering saguaro cactuses. And, by all means, learn about the indigenous peoples, pioneers, cowboys, and miners who shaped the state's rich history.

I believe life is better in Arizona, and I take pride in sharing a taste of our lifestyle with visitors like you.

Sincerely,

Doug Ducey
Governor, State of Arizona

423

Granite Dells, Watson Lake, Prescott
PHOTO BY COLLEEN MINIUK-SPERRY

CONTENTS

2018 OFFICIAL STATE VISITOR'S GUIDE

FEATURES

4 TREKKING ARIZONA
Lace up those hiking boots and hit the trail—The Arizona National Scenic Trail, that is.

9 SCIENCE ON A WHIM
Gain new knowledge while you're having fun at these seven science-themed attractions.

13 A PERFECT DAY IN ARIZONA
Need some help planning an Arizona day? Check out these itineraries for daytrips around the state.

17 ARIZONA TRIBES, FROM A TO Z
Find new ways to experience Indian Country in Arizona, with each letter of the alphabet.

22 POSTCARDS FROM ROUTE 66
Travel across the Mother Road for an old-fashioned road trip with plenty of fun stops along the way.

24 WHERE THE PAVEMENT ENDS
Leave other trips in the dust as you discover hidden hideaways on an off-road adventure.

28 CACTUS BITES
They may be prickly on the outside, but cacti are tasty on the inside. Sample foods made from Arizona's iconic plants.

30 RETRO RESPITE
Get a taste of history along with a good night's sleep at these four Arizona lodging gems.



MATT HAGE

REGIONAL HIGHLIGHTS

Find a map, resource guide, attractions and accommodations perfect for exploring each region.

36 PHOENIX & CENTRAL ARIZONA

You'll never run out of sights to see in the urban core of Arizona, which encompasses the cities of Greater Phoenix, as well as cowboy country to the north and farming communities to the south.

60 TUCSON & SOUTHERN ARIZONA

Savor an inviting blend of cityscape and open space, including the metropolitan Tucson area, Southern Arizona's birding and wine regions, and quaint towns steeped in Arizona's Old West and mining legacies.

68 NORTHERN ARIZONA

Flora and fauna and wondrous geographic features—surrounding and including the Grand Canyon, Flagstaff, Navajo Tribal Lands and the White Mountains—inspire visitors to take their time soaking in the sights of Arizona's high country.

84 ARIZONA'S WEST COAST

Dive into sun-soaked days of water play in Lake Havasu City and Parker, take a scenic stroll on the Grand Canyon Skywalk, travel back in time with a drive along Historic Route 66 west of Kingman or with a visit to Yuma Territorial Prison State Historic Park.

92 NORTH CENTRAL ARIZONA

The red rocks of Sedona, the historic charm of Prescott and Jerome, the cool pines of Payson and the scenic appeal of the Mogollon Rim...the vast diversity of this slice of the state promises peaceful respite for every type of traveler.



ON THE COVER

Submarine Rock, Sedona

PHOTO COURTESY ARIZONA OFFICE OF TOURISM

YOUR ONLINE GUIDE

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- *pinterest.com/arizonatourism*
- *instagram.com/visit_arizona*
- *youtube.com/user/arizonatourism*

PLUS

33 Statewide Calendar of Events
99 Arizona Visitor Centers
101 Smart Traveler
104 Arizona State Map

ARIZONA EXPEDITION

Arizona Expedition is back for another year of exciting road trip adventures around the state. This year, four unique personalities enjoy their own journey through unrivaled Arizona experiences, from family fun and urban thrills to culinary creations and the mind/body/soul connection. Dive into the photos, videos and other tidbits from their trips, and plan your own expedition at ***azexpedition.com.***



A warm welcome from Arizona!

The fact you're taking the time to read this guide tells me that you're probably a traveler.

Not a tourist nor a sightseer, but a traveler. Travelers aren't afraid to ride with the windows down, get their boots dirty or take a big bite of something they've never tried before. Travelers tend to linger longer, stay up later, walk just a little farther.

Arizona is a destination for travelers. Any place can claim to be "vibrant" or "unique," but Arizona's landscape transcends the utility of everyday adjectives. And it's not just the red-rock buttes, pulled-taffy canyons and cartoon-like cactuses the state is famous for; it's also the frothy whitewater, the snow-crusted peaks and the alpine lakes.

Travelers ultimately take trips to add to the story of their lives. It is my hope that this guide to Arizona will make the "story of you" a little (or a lot) more fascinating.

Happy traveling,

Debbie Johnson
Director, Arizona Office of Tourism



TREKKING ARIZONA

From the desert to the mountains, the Arizona Trail touches five distinct biomes.
PHOTO BY @SOAZMTB

Hiking Arizona's National Scenic Trail

Arizona is a big state—the sixth largest in the nation—and one way to get a sense of that expanse is to walk the length of it.

The **Arizona National Scenic Trail** is a lanky route traversing the entire state, stretching from Mexico to Utah. The trail begins at the Coronado National Memorial on the U.S.-Mexico border and rambles north for 800-plus miles crossing isolated mountain ranges, rolling grasslands, sun-spanked desert, forested plateaus and a canyon called Grand.

A Flagstaff teacher, Dale Shewalter, hatched the idea for the ambitious trail in the 1980s. Designated a National Scenic Trail in 2009, the pathway is popular with hikers, equestrians and mountain bikers. While some trail users are through-hikers, most seek shorter jaunts. The Arizona Trail is divided into 43 passages, and even those can be tackled in more bite-sized chunks.

To sample some of the immense beauty of the Arizona Trail, here are a few passages, from south to north.

BY ROGER NAYLOR

ARIZONA TRAIL
SECTION 11

SANTA CATALINA MOUNTAINS • 18.5 MILES

This section immediately gives you a taste of Arizona's staggering diversity as it whisks you from desert to cool mountain forests with a stop at a refreshing swimming hole along the way. The Santa Catalina Mountains form the northern border of Tucson, rising ramparts of peaks and angled summits, and this route takes you to the top.

From the Gordon Hirabayashi Trailhead, the trail first follows a dirt road before branching off and passing an old reservoir that's now mostly silted over into a marshy riparian area. (Don't worry, this isn't your swimming hole.)

The trail crosses Sycamore Canyon before making a steep descent into the Sabino Basin. You'll enjoy expansive views as you follow the east fork of Sabino Canyon, which is the quintessential Sonoran Desert oasis. This is a woodsy cathedral guarded by cactus spines and rocky cliffs. Streams wind through canyon bottoms and around a jumble of granite boulders. A slender forest of sycamore, cottonwood, willow, ash and walnut trees canopies clear pools and splashy cascades. Steep slopes above bristle with saguaro.

Past the junction with the Sabino Canyon Trail, continue uphill along the west fork to Hutch's Pool. With sheer rock sides and a small sandy beach, this is a popular swimming hole almost year-round. In the desert, air conditioning keeps us sane, but water and shade set us free.

Leave the pool behind—no easy task—and make the climb toward Romero Pass, steep at times but with level stretches mixed in. Turn onto Wilderness of Rocks Trail through a gallery of sculpted stone. Turn again onto Marshall Gulch Trail and follow it through pine forest to the trailhead. Bonus: You're just down the road from the mountain hamlet of Summerhaven, where you can treat yourself to a meal, a beverage and a cookie the size of a manhole cover.



View of the Santa Catalina Mountains
PHOTO BY @LITTLE.BRYAN

SECTION 11 SHORT VERSION

During cooler weather, hike in from Sabino Canyon. In warmer months, start from Marshall Gulch high in the Catalina Mountains. Hike down to Wilderness of Rocks or connect with Aspen Trail for a woodsy loop of about four miles.



Hiking the Arizona Trail in the Catalina Mountains just north of Tucson
PHOTO BY A.T. WILLETT



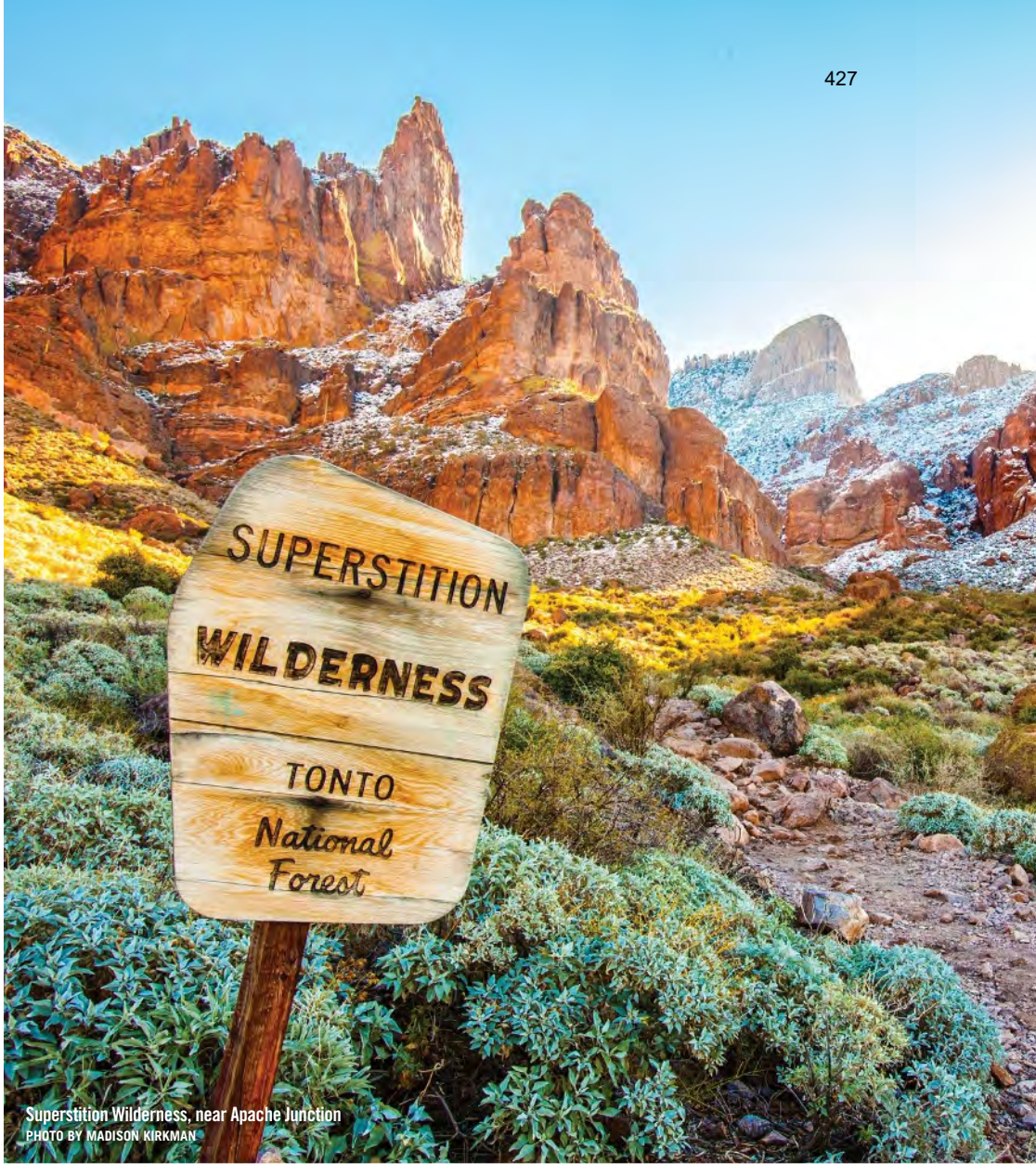
ARIZONA TRAIL
SECTION 19

SUPERSTITION WILDERNESS • 29.4 MILES

This passage heads into the Superstition Wilderness, protecting a fierce mountain range on the eastern edge of the Valley of the Sun. The Supes, as they're known locally, are rugged, untamed and drenched in legend—blame it on the Dutchman's elusive gold. Tales of the Lost Dutchman Mine began luring treasure hunters in the late 19th century with rumors of hidden gold and deathbed directions. Several men died under mysterious circumstances while seeking the mine.

Visitors today are more likely to encounter sunscreen-slathered hikers than grizzled prospectors. The trail first descends into Rogers Canyon, then angles northeast toward Reavis Saddle and on to historic Reavis Ranch. Elisha Reavis was another colorful character drawn to the Superstitions. The bearded recluse established a lonely homestead in the 1870s, growing vegetables that he occasionally packed out and sold in Phoenix and Florence. In 1896, his body was found on the trail, cause of death unknown. He was buried on the spot, and the Arizona Trail passes by the unmarked grave.

The ruins of the ranch are tucked away in a lovely valley with pine trees, a shady creek and a remarkable middle-of-nowhere apple orchard. After leaving the ranch, the trail climbs through Reavis Gap with good views along the way. You'll pass Walnut Spring and Cottonwood Spring. The trail emerges from Cottonwood Canyon, and you're soon tracing the edge of mighty Roosevelt Lake past the marina and finally crossing the water on Roosevelt Lake Bridge.



Superstition Wilderness, near Apache Junction
PHOTO BY MADISON KIRKMAN

TAKE A HIKE

Keep those boots laced up and discover more hiking trails at Arizona's 35 state parks. Find the closest park to you at **VisitArizona.com.**


Superstition Wilderness
PHOTO BY MATT HAGE

SECTION 19 SHORT VERSION

Much of this passage is deep in the Superstitions and hard to reach, but the easy hike along Roosevelt Lake is beautiful.



SECTION 31 SHORT VERSION

Enjoy wildlife viewing at Marshall Lake with a stroll across Anderson Mesa. Or hike in on Sandys Canyon Trail to the scenic heart of the passage.



Walnut Canyon, Flagstaff
PHOTO BY @MAGGIEGARNET



Explore the past at Walnut Canyon
PHOTO BY NICK BEREZENKO

ARIZONA TRAIL
SECTION 31

WALNUT CANYON
17.9 MILES

Starting from Marshall Lake, which is more marsh than lake, keep an eye peeled for wildlife. This crucial wetland is a popular hangout for deer, elk, bald eagles, osprey and a slate of waterfowl. Enjoy an easy jaunt across Anderson Mesa, a gently sloping tableland with scattered timber framing views of the San Francisco Peaks.

The trail drops into Lower Walnut Canyon with wildflower-streaked meadows beneath cross-bedded sandstone cliffs in soft sunset hues. Shallow caves are gouged out along the base of the angled and contorted stone walls. Past the Sandys Canyon Trail junction, turn right and continue through Walnut Canyon.

A few hundred years ago, Walnut Canyon was a thriving population center for the Sinagua culture. Prehistoric cliff dwellings are secreted away in the natural contours of the gorge. They're now protected as part of Walnut Canyon National Monument.

The trail climbs steeply out of Walnut Canyon at Fisher Point. From there it follows the rim, dipping in and out of a tributary gorge before reaching the trailhead near Interstate 40.

ARIZONA TRAIL SECTION 38

GRAND CANYON INNER GORGE • 21.8 MILES

It wouldn't count as an Arizona Trail if it didn't cross the Big Ditch. This passage begins at the South Kaibab Trailhead and swoops down the canyon wall in a series of switchbacks. Just shy of a mile, it breaks free at Ooh Aah Point, thrusting out into the gorge with views breaking wide all around you.

The trail follows a spine of rock down to Cedar Ridge, then curves past O'Neill Butte and reaches the top of the redwall formation at a beautiful overlook called Skeleton Point. It zigzags down the cliffs to the Tonto Platform and makes a steep descent across the inner gorge.

The trail crosses the Colorado River at the Black Bridge, an engineering marvel built in 1928. Head downstream to Bright Angel Creek and past the campground to Phantom Ranch, a great place to stop for cold lemonade. Follow the creek, and as you leave the ranch, the path becomes the North Kaibab Trail.

Climb through The Box, with exposed rock walls closing around you. The trail crisscrosses the creek on footbridges before reaching the short path to Ribbon Falls. This is a must-stop detour leading back to a picturesque grotto and a silver cascade that looks as if it were plucked from a tropical island.

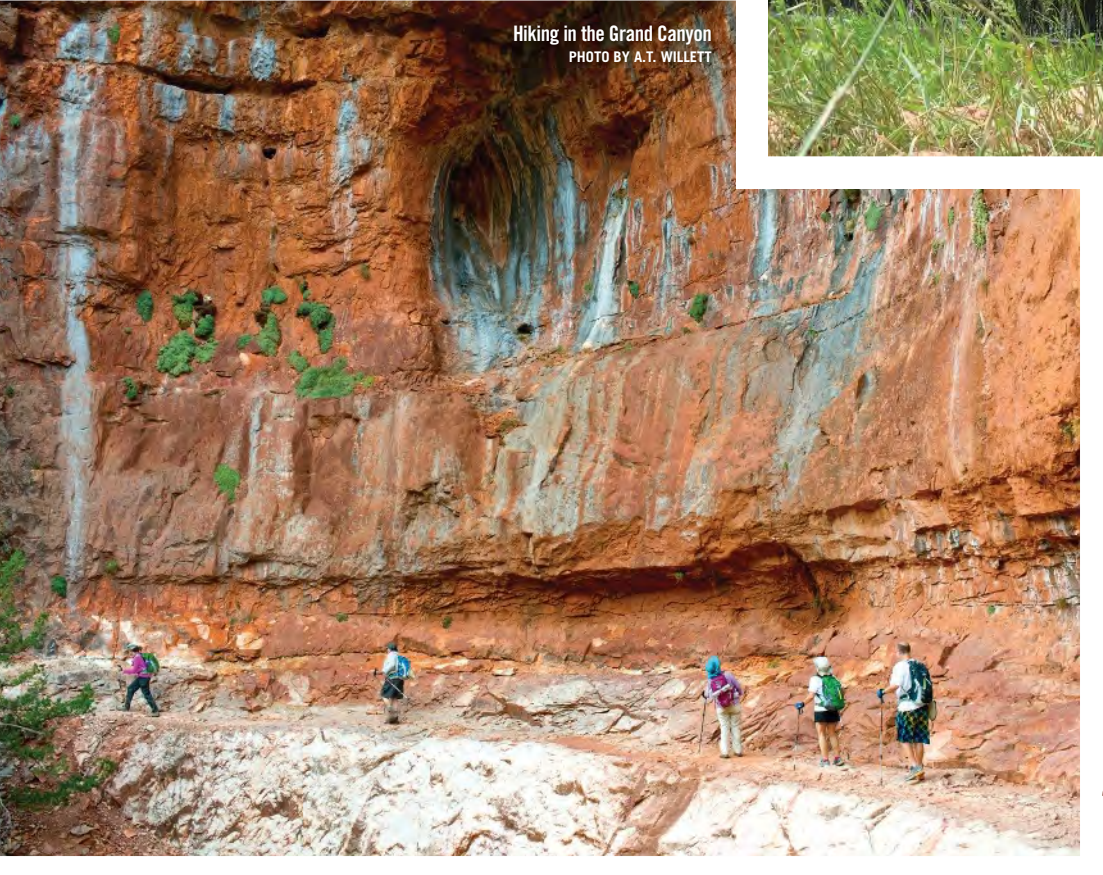
From the falls, the trail continues along the creek to Cottonwood Camp. At last it leaves the stream behind, passing the turnoff to Roaring Springs, a frothy geyser that provides all the drinking water for the Grand Canyon. You'll pass through a tunnel and climb the final switchbacks to the forested heights of the North Rim. AZ

SECTION 38 SHORT VERSION

From the South Rim, it's 1.5 miles to Cedar Ridge, a rest area with restrooms. From the North Rim, it's 1.7 miles to Supai Tunnel.



Ribbon Falls, Grand Canyon
COURTESY ARIZONA OFFICE OF TOURISM



Hiking in the Grand Canyon
PHOTO BY A.T. WILLETT

For more details and directions to trailheads, visit **AZTRAIL.ORG.**

FHERR14JR-FLICKR

SCIENCE ON A WHIM

No need for your pocket protector to enjoy these Arizona attractions that mix tech and entertainment

BY TIM VANDERPOOL

This page: Pima Air and Space Museum, Tucson



COURTESY PIMA AIR AND SPACE MUSEUM



The mighty Hoover Dam, Arizona–Nevada border

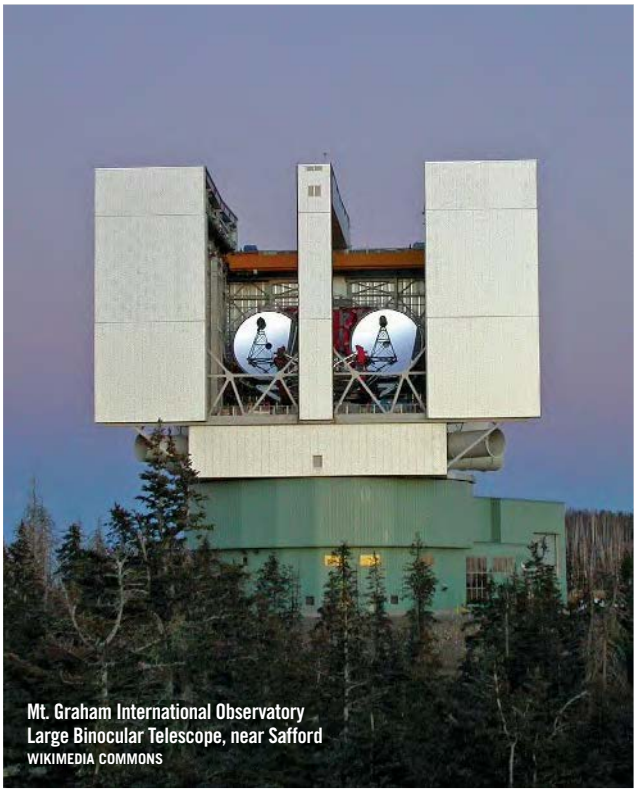
When folks consider all the reasons to visit Arizona—the Grand Canyon, Spring Training, abundant nature—their lists should also include science. It's easy to appreciate our scientific gems, from the alpine-laced Mount Graham International Observatory to the Verde River's meandering grandeur. And all you need to bring is your curiosity and a healthy sense of adventure. Here are some highlights to get you started.

MOUNT GRAHAM INTERNATIONAL OBSERVATORY

This mountaintop aerie ranks among the world's leading astronomical sites, and its Large Binocular Telescope is the most advanced optical scope on Earth. While only professionals may peer through these magnificent devices—with a viewing value nearing $90,000 per night—visitors can tour the impressive site and see these lensed giants up close. Start your journey at Discovery Park Campus, in the desert town of Safford below Mount Graham. Operated by Eastern Arizona College, the park offers stargazing on Saturday nights, rollicking rides in a space shuttle simulator and a detailed exhibit about creating huge telescope mirrors.
visitarizona.com/business/discovery-park

PIMA AIR AND SPACE MUSEUM

In Tucson, just outside a working Air Force base, you'll find more than 80 acres devoted to the evolution of flight—from a replicated Wright brothers' biplane to the model of an X-45 hypersonic test



Mt. Graham International Observatory Large Binocular Telescope, near Safford
WIKIMEDIA COMMONS




TONDAISTOCK

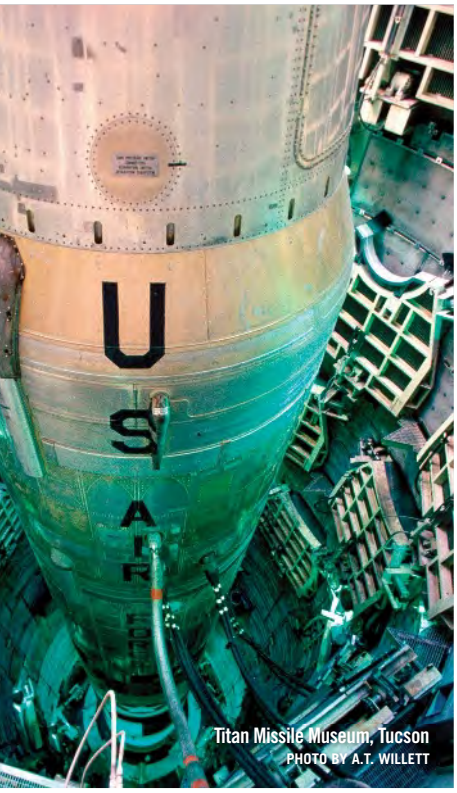
plane. Interactive, kid-friendly exhibits evoke the thrill of high-altitude flight, and retired military craft—from Thunderbolts and Falcons to gleaming seaplanes—fill the cavernous display rooms. Dynamic exhibits continue the story. There's *The Space Race,* which examines the Cold War's lunar competition. *Follow the Water* details efforts to find water on Mars, and *Material Technology* examines the advanced composite materials used to construct modern airplanes and spacecraft.
visitarizona.com/business/pima-air-and-space-museum

TITAN MISSILE MUSEUM

Titans were once the mightiest missiles in America's nuclear arsenal. Bunkered in mountain silos near Tucson, they could be launched at a moment's notice and travel at speeds nearing 15,000 miles per hour. International accords now keep the silo roof cemented half open, with a tinted glass dome filling the gap. Viewed from that dome, the Titan rises like an eerie leviathan, its nose nearly touching the glass. There's a small, square hole beneath the missile's tip, allowing Russian satellites to confirm that the nuclear payload has been removed. Above ground, an asphalt path weaves among missile artifacts: a disembodied rocket engine, a slightly bent antenna, whirling wind gauges, a decapitated nose cone. Follow a docent into the subterranean control center. The brains of this doomsday machine existed in a room no larger than a storage locker, flickering with gauges, switches and dials. Mounted on thick springs, it was built to survive a direct nuclear hit.
visitarizona.com/business/titan-missile-museum

HOOVER DAM

Everything about Hoover Dam is just plain big. Dedicated in 1935, this Northwest Arizona landmark was considered the greatest engineering marvel of its day, soaring to a still-unmatched height of 726 feet, with a 660-foot-thick base. That's a lot of concrete—enough, in fact, to construct a highway from coast to coast. But Hoover is content to stretch across Black Canyon from Nevada to Arizona, where high-speed elevators whisk visitors down to a viewpoint above the enormous hydroelectric generators. These turbines rise seven stories high and create enough energy to serve some 500,000 homes. Another viewpoint stands over a vast water pipe that serves those turbines with a steady flow from the Colorado River. Further below, at the base, you can look upward at that huge concrete wall, strong enough to hold back the force of 500-foot-deep, 110-mile-long Lake Mead.
visitarizona.com/uniquely-az/parks-and-monuments/hoover-dam



Titan Missile Museum, Tucson
PHOTO BY A.T. WILLETT

MCDOWELL SONORAN PRESERVE

You'll find a 31,000-acre, cactus-jeweled classroom at Scottsdale's McDowell Sonoran Preserve. This is one of America's largest urban sanctuaries—vast, unspoiled desert, abundant with wildlife and dissected by paths. The preserve is geologically diverse and unique. Humans have called the lands home for more than 7,000 years, leading to numerous archeological


JULIE FOSKETT

SCIENCE FOR KIDS

ARIZONA MUSEUM OF NATURAL HISTORY – MESA

Kids get a fun primer on the natural world with interactive exhibits such as *DinoZone,* featuring life-size replicas of extinct creatures. Learn about ancient sea life, take a ride down the Triceratops slide and listen as the past comes alive on three-story-high Dinosaur Mountain.

ARIZONA SCIENCE CENTER – PHOENIX

This nationally ranked science center and planetarium is a mecca for kids, with featured exhibits such as *Pompeii,* for both adults and kids alike. The exhibit is open November 18, 2017—May 28, 2018.

I.D.E.A. MUSEUM – MESA

Art meets learning at this unique destination, where kids can master everything from engineering to science. Check out the HUB, a hands-on gallery that lets them create eyeglasses, make music or even design their own robots.

FLANDRAU SCIENCE CENTER AND PLANETARIUM – TUCSON

Children love special classes such as Puzzles, Proofs & Patterns, which explores mathematics through puzzles and games, and Critical Zone, dissecting the Earth's life zone, from treetops down to bedrock—and all the plants, animals and microbes in between.

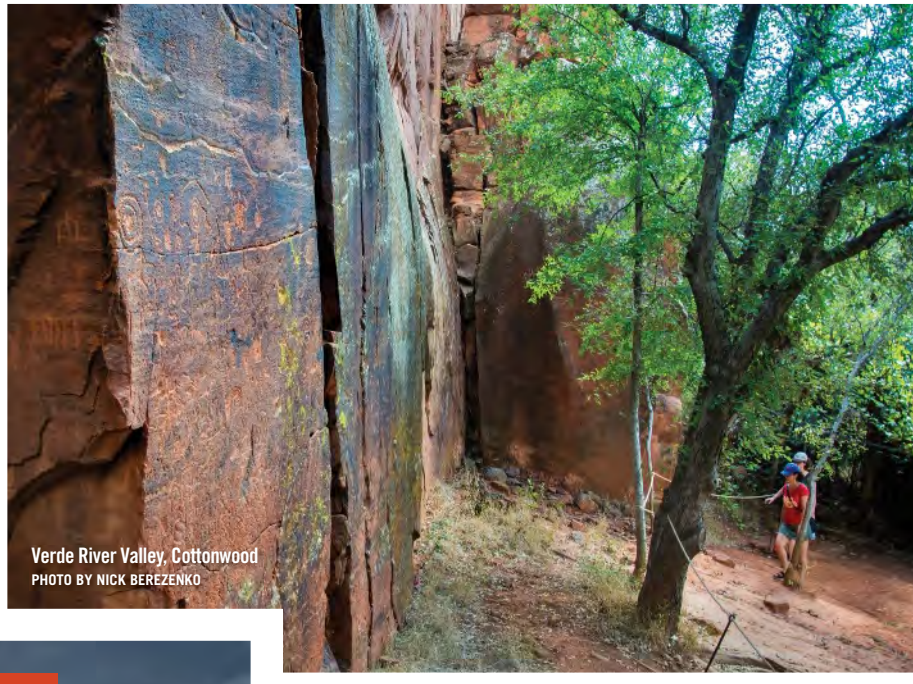
2018 STAR PARTY – GRAND CANYON SOUTH RIM

Each June (June 9–16 this year), amateur astronomers volunteer their expertise and offer free nightly astronomy programs and telescope viewing. Through the telescopes, explore an assortment of planets, double stars, star clusters, nebulae and distant galaxies. If you can't make it for the event, camp at the Grand Canyon and see the stars on your own any time of year.

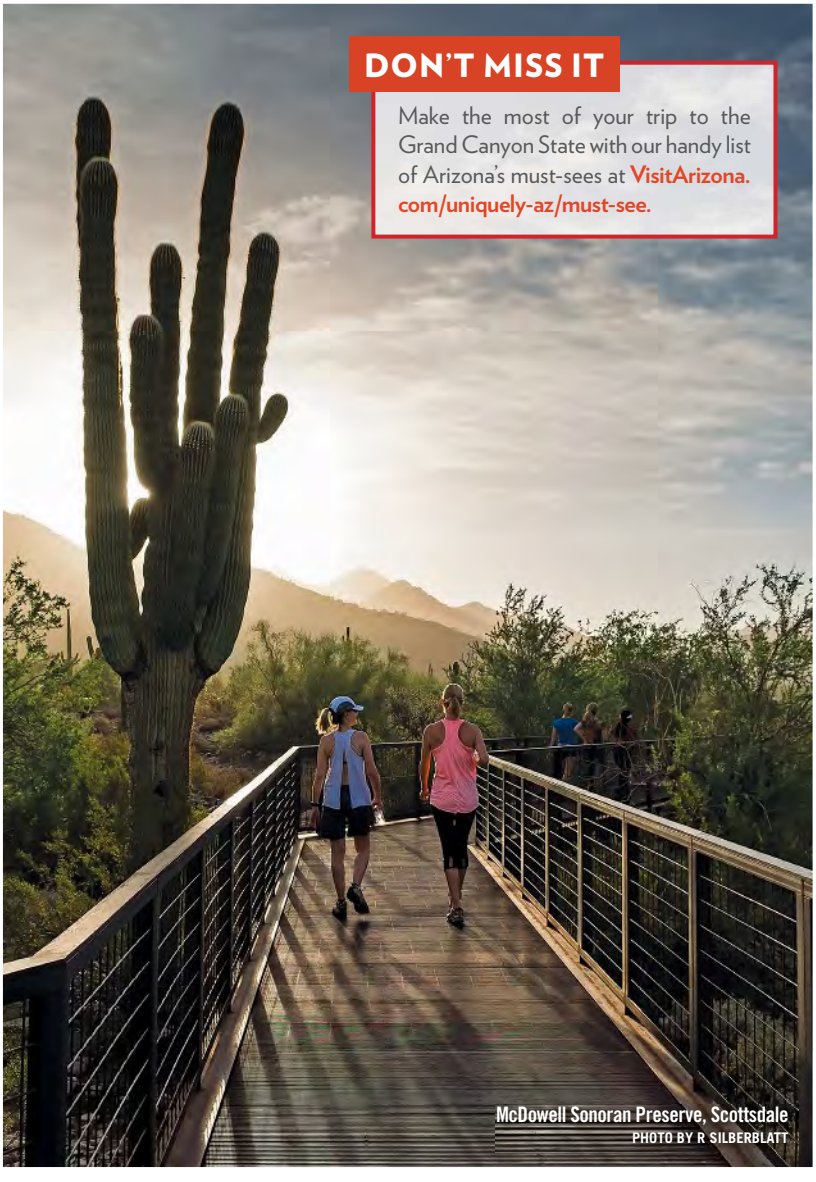
features. Try the Ringtail Trail, a 2.4-mile loop that offers exquisite vistas at the Lost Dog Overlook—an ancient tool-making site—and meanders among spring wildflowers. Or join a Discovery Hike, where guides share information about native plants, human history, geology and wildlife.
visitarizona.com/business/mcdowell-sonoran-preserve

METEOR CRATER

First, take an awestruck moment to consider the meteorite that thundered into the Colorado Plateau at 26,000 miles per hour, blasting a cavity some 2.5 miles around and nearly 600 feet deep. Then feel relief that the cataclysm occurred roughly 50,000 years ago. Today, the crater is flush with observation trails and activities. Stand



Verde River Valley, Cottonwood
PHOTO BY NICK BEREZENKO



DON'T MISS IT

Make the most of your trip to the Grand Canyon State with our handy list of Arizona's must-sees at VisitArizona.com/uniquely-az/must-see.

McDowell Sonoran Preserve, Scottsdale
PHOTO BY R SILBERBLATT



Meteor Crater, east of Flagstaff
PHOTO BY NICK BEREZENKO

on an air-conditioned viewing deck to take it all in. Then stop at the Interactive Discovery Center for *IMPACT, Mystery of Meteor Crater,* a gripping re-creation of that long-ago collision through 3-D modeling and animation.
visitarizona.com/business/meteor-crater

VERDE RIVER VALLEY

In the desert, rivers are precious, and the Verde River Valley, north of Phoenix, is among the most precious of all. This winding waterway, with its lush canopy of sycamores, cottonwoods and willows, sheltered human inhabitants for a millennium. Today, it provides a habitat for a rich variety of wildlife, from Gila woodpeckers and belted kingfishers to the Colorado pike minnow. Grab a good guidebook, and explore the river by foot or by kayak. And mark your calendar for the annual Verde Valley Birding and Nature Festival in April, where you'll find workshops, field trips and a deep passion for this cherished ribbon of life.
visitarizona.com/uniquely-az/unique-communities/verde-valley AZ



Follow these fun-filled itineraries for memorable daytrips to one-of-a-kind area attractions.

A PERFECT DAY IN ARIZONA

Ready to plan your road trip? Check out these sample itineraries to help shape your getaway. Whether you have a day, a week or a month to explore, it's time to let go and let us be your guide.

Taste the region's best food, relax at a spa or on the golf course, learn about local cultures, bring the family together for adventure—Arizona has all of that and more. Get ready to soak up the sun and have some fun!

GET WET IN ARIZONA'S WEST COAST

7:30 a.m.

Wake up with fresh breakfast made from scratch at **The Press Café & Bistro** in Yuma.

9:30 a.m.

Learn what it was like to live in an Arizona mining town in the 1800s at **Castle Dome Mine Museum and Ghost Town.** (Open seasonally; call for hours.)

1 p.m.

Feel like a pirate when eating lunch on the banks of the Colorado River at **Black Pearl Restaurant** in Parker.

2 p.m.

Get some air and **parasail** over the Colorado River in Parker.

4 p.m.

Get a taste of English charm with a walking tour of the **London Bridge** in Lake Havasu City.

Sunset

Finish up the day with a **sunset cruise** on Lake Havasu.

Parasail above the Colorado River in Parker
MARK LYPCZYNSKI

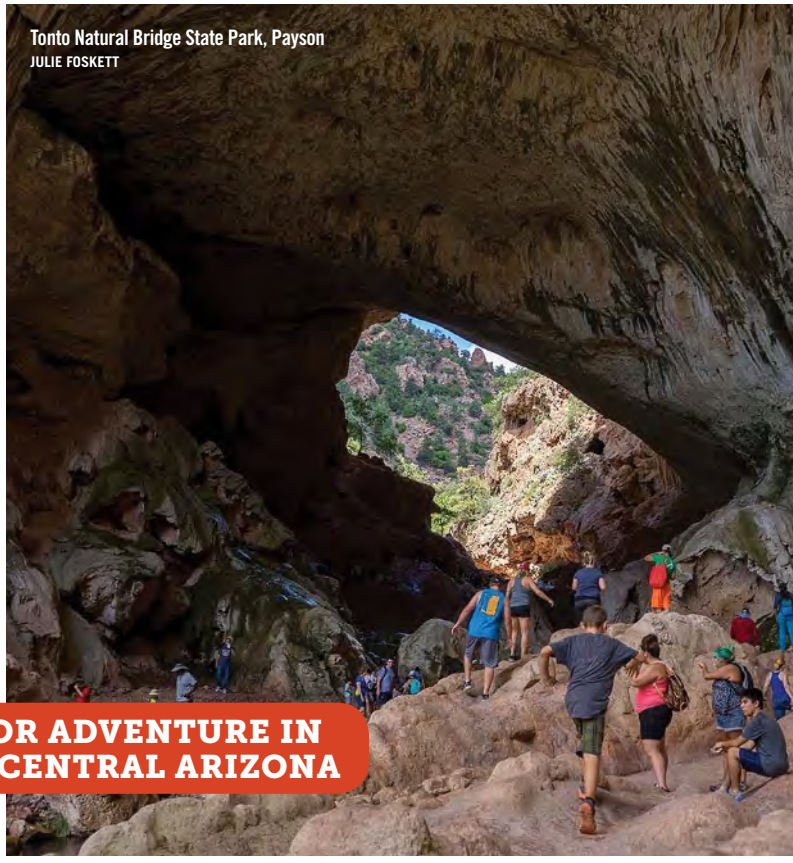
8 a.m.
Grab a homestyle breakfast at **Beeline Café** in Payson.

9:30 a.m.
Take a scenic jaunt on one of the trails at **Tonto Natural Bridge State Park.** The eponymous arch stretches more than 400 feet above Pine Creek, forming the largest natural travertine bridge in the world.

12 p.m.
Have lunch at **Mile High Grill and Inn** in the heart of quaint downtown Jerome.

2 p.m.
See the otherworldly Granite Dells as you **kayak** on Watson Lake in Prescott.

6 p.m.
Take in the magnificent Art Deco décor while savoring exceptional cuisine at the **Peacock Dining Room,** then wash it down with a stroll down **Whiskey Row.**



Tonto Natural Bridge State Park, Payson
JULIE FOSKETT

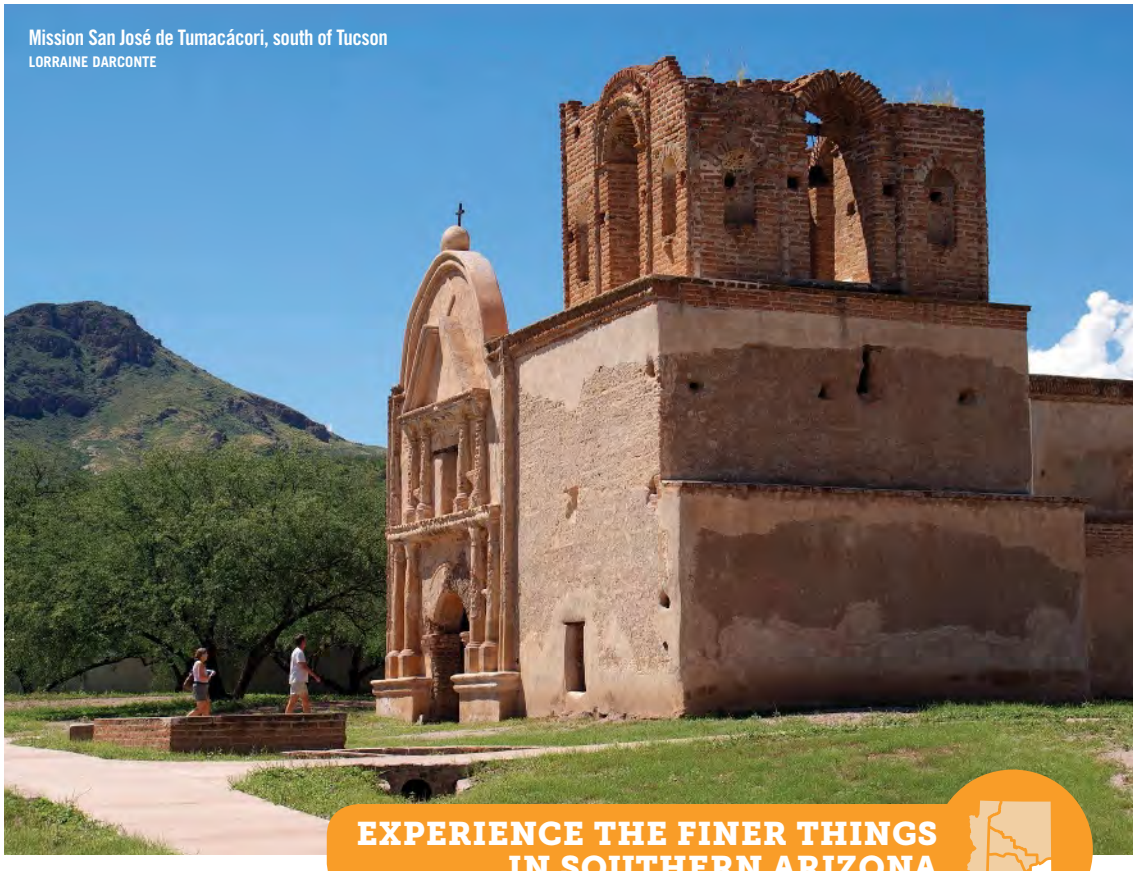
OUTDOOR ADVENTURE IN NORTH CENTRAL ARIZONA



Jasper Forest, Petrified Forest National Park, Holbrook
ANDREW KEARNS-FLICKR

EXPLORE THE ROCKS AND MINERALS OF NORTHERN ARIZONA





Mission San José de Tumacácori, south of Tucson
LORRAINE DARCONTE

EXPERIENCE THE FINER THINGS IN SOUTHERN ARIZONA



8 a.m.
Enjoy breakfast outside on the porch at **Darbi's Café** in Pinetop-Lakeside.

Lunch
Pack a **picnic lunch** to enjoy on the shores of the 1,500-acre lake.

Pitstop
Take home a souvenir from the numerous **rock shops** in Holbrook.

10:30 a.m.
Take an easy hike and see some petroglyphs at **Lyman Lake State Park.**

1:30 p.m.
Walk among the fossilized fallen trees and admire the colorful badlands at **Petrified Forest National Park.** See skeleton displays of fossilized phytosaurs—giant crocodile-like reptiles—in the **Rainbow Forest Museum.**

6 p.m.
Wrap up the day with dinner at **The Turquoise Room** at La Posada in Winslow.

9 a.m.
Get your breakfast with a view on one of the patios at **Stables Ranch Grille** at Tubac Resort & Spa.

11:30 a.m.
Admire the exquisite Spanish Colonial style of Mission San José de Tumacácori at **Tumacácori National Historical Park.**

1:30 p.m.
Split a designer pizza, or dig into your own complex soup, organic salad or hearty calzone at the **Velvet Elvis** in Patagonia.

2:45 p.m.
Sip and savor fine *vinos* at tasting rooms in the **Sonoita Wine Region.** Some wineries also offer tours of their vineyards so you can see the grapes while you taste the fruits of their labor.

A LITTLE BIT FOR EVERYONE IN PHOENIX & CENTRAL ARIZONA

8 a.m.

Start off the day with a made-from-scratch breakfast at **Bedoian's Bakery & Bistro** in Wickenburg.

9:30 a.m.

Rent a watercraft and find some excitement on the water at **Lake Pleasant.**

12:30 p.m.

Learn about, and admire, American Indian art on a tour through the **Heard Museum** in Phoenix and have a Southwestern-inspired lunch at **Courtyard Café.**

3 p.m.

FIll your bags with fabulous finds on a shopping jaunt at **Scottsdale Fashion Square.**

7:30 p.m.

Dine on Arizona-style barbecue and new wave Mexican soul food, all served with homemade secret recipe sauces, at **Jalapeño Buck's** right in the middle of **B&B Citrus Farms** in Mesa. AZ



Jalapeño Bucks, Mesa
PHOTO COURTESY OF JALAPEÑO BUCKS

ARIZONA TRIBES, FROM A TO Z

26 ways to experience Indian Country in Arizona

BY DEBRA UTACIA KROL

The 22 tribal communities in Arizona offer much more than just pow wows and beadwork. In fact, explorers will discover a range of attractions, activities and sights, from A to Z!

A Learn about **ancient cultures** in many tribal museums. The Cocopah Museum and Fort Yuma-Quechan Museum along Arizona's western border have wonderful displays about these river cultures. The Him-Dak Eco-Museum showcases the history and culture of the Ak-Chin Indian Community south of Phoenix.



FOSKETT CREATIVE



AMY HASKELL

B **Basketry** is one of Indian Country's oldest and most beloved art forms. Find works for sale in the Tohono O'odham Nation Cultural Center southwest of Tucson and in galleries along the Hopi Arts Trail near Tuba City or in the San Carlos or White Mountain Apache tribal communities near Globe. See the wonderful baskets of the San Juan Southern Paiute weavers or the Yavapai-Prescott Indian Tribe baskets at Sharlot Hall Museum in Prescott.

PLAN ON IT

With so much to see and do in Arizona's diverse communities, it can be hard to narrow down the perfect trip. That's where we come in. Browse great travel deals and fantastic vacation packages and start planning your Arizona adventure at **VisitArizona.com/planning/offers.**

C Experience Native Arizona under the stars. **Camping** facilities are available in several Northern Arizona communities, including the Hualapai at Diamond Creek and White Mountain Apache tribal lands. Or pack your gear down the Grand Canyon to Havasupai, where you can revel in Havasu Canyon's famed blue-green waters. Just remember that permits are required.



RON NIEBRUGGE

Drive! Ramp up your driving skills to *Fast & Furious* levels at the Bondurant Racing School at Gila River Indian Community near Phoenix. For those who prefer to watch the action, head to Cocopah Speedway in Yuma for the annual Demolition Derby.

Each of Arizona's tribal communities has individual customs and regulations. Practicing proper **etiquette,** as you would when visiting another's home or community, will help you enjoy your stay while honoring the people, lands and culture. For a list of guidelines, go to visitarizona.com/visiting-tribal-lands.



HIEN TRUONG

Fairs and rodeos provide windows into Arizona tribal cultures. Two of the biggest fairs are the Navajo Nation Fair in September in Window Rock and the Tohono O'odham Nation Rodeo & Fair in January outside Tucson. Enjoy the tradition of pow wow at Thunder Mountain Pow Wow, held each August on the Kaibab Band of Paiute Indians' land near Fredonia on the Arizona Strip.



ARIZONA OFFICE OF TOURISM

Golf has become popular in Arizona tribal communities. WeKoPa Golf Club at Fort McDowell Yavapai Nation near Scottsdale is just one of Arizona's world-class courses in Indian Country. You can also hit the links at the Pasqua Yaqui Tribe's Sewailo Golf Club in Tucson (designed by acclaimed American Indian golfer Notah Begay III), Apache Stronghold Golf Club in San Carlos or other manicured courses.



MARK LYPCZYNSKI

Horseback rides. See Indian Country from the perspective of the horsey set with Fort McDowell Adventures offers both short rides and all-day trail drives from Labor Day through Memorial Day. Or enjoy the open trail at the Gila River Indian Community's Koli Equestrian Center just south of Phoenix.

I Southwestern **Indian jewelry** has long captured the hearts of collectors, and visitors can gain their own appreciation for this unique art form by visiting tribal museums and galleries. Explore the Hopi Arts Trail outside Tuba City, visit a trading post on the Navajo Nation or visit gift shops in other tribal communities to see and purchase wonderful pieces.



FOSKETT CREATIVE

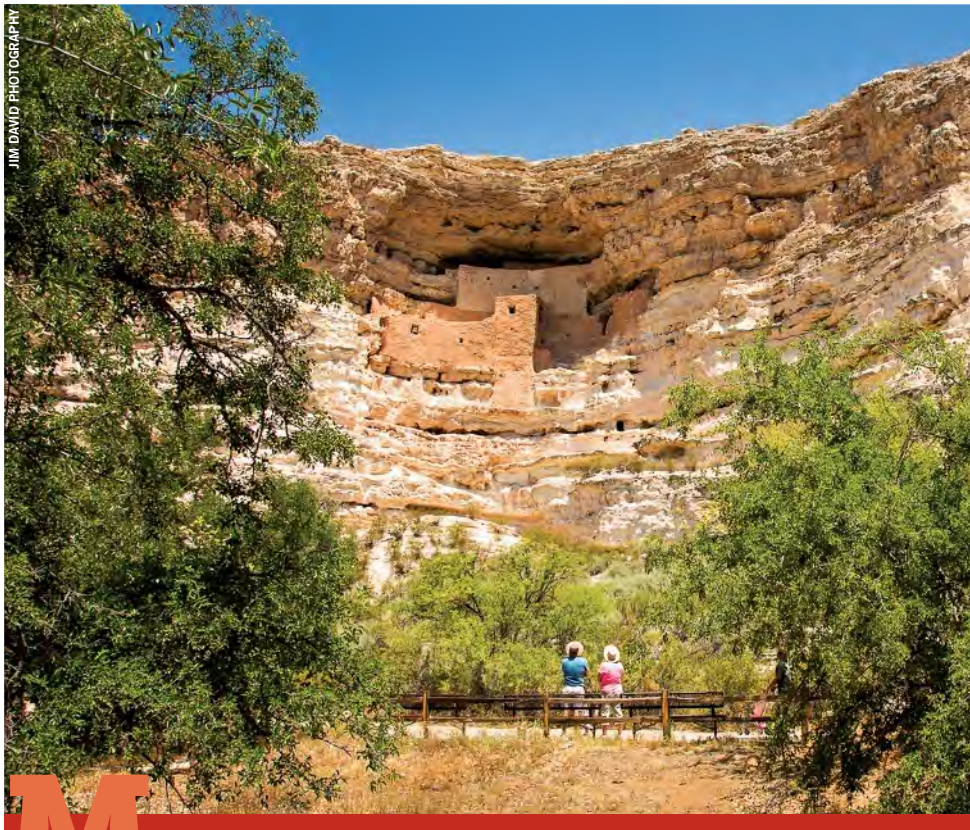
J Bring your **Jet Ski**—or rent one—and cool off in the Colorado River. Avi Casino Resort in Fort Mojave offers rentals for on-water fun. BlueWater Resort & Casino, on the lands of the Colorado River Indian Tribes, has a dock where you can park your water toys, or try your water-walking skills out at Wakeboard Island, a skate park-like waterway for wakeboarding.

K While on Hopi tribal lands, see **Katsina doll carvers** in action. The dolls—which aren't really dolls, but teaching tools—are among the most sought-after art forms in Native Arizona.



AMY HASKELL

L Check out the Pascua Yaqui's AVA Amphitheater in Tucson for some of the state's best **live entertainment.** The largest outdoor music venue on Arizona tribal lands, the 5,000-seat AVA features music acts ranging from hard rock to country and Latin to pop. Other tribal casinos have theaters with live acts, including the Mazatzal Hotel & Casino in the Tonto Apache community just outside Payson.



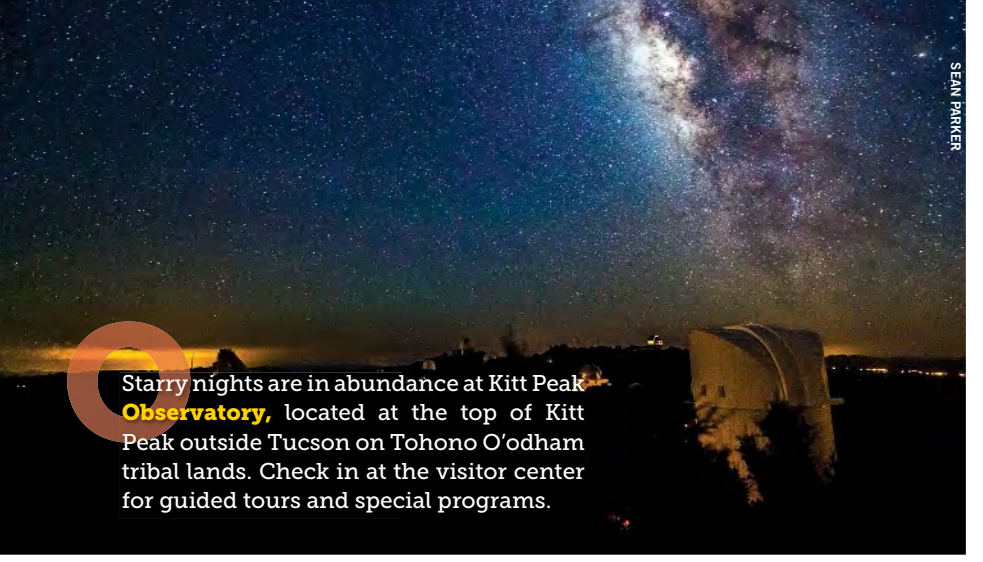
JIM DAVID PHOTOGRAPHY

M **Montezuma Castle National Monument,** located close to the Yavapai-Apache Nation in the Verde Valley, is the site of a 12th-century Sinaguan high-rise dwelling sited on a cliff face. Nearby is Montezuma Well, the place of the Yavapai people's emergence into our world, according to their creation stories.

N Explore **nature's bounty** in tribal lands. Enjoy cool riparian parks in the Colorado River Indian Tribes' community or in Yuma, home to the Quechan Tribe. Hunt for elk, deer, bighorn sheep and other big game on Hualapai, San Carlos, Kaibab Paiute or White Mountain Apache lands.



FRED HOOD



SEAN PARKER

Starry nights are in abundance at Kitt Peak **Observatory,** located at the top of Kitt Peak outside Tucson on Tohono O'odham tribal lands. Check in at the visitor center for guided tours and special programs.



ARIZONA OFFICE OF TOURISM

Pottery is another beloved art form produced in Arizona tribal communities. Visitors can find exquisitely detailed Hopi pottery, Zuni pots with boldly painted designs and earthy Navajo wares. River tribes like the Mojave are also reviving their pottery traditions.

Go on a **quest for family adventure!** Rawhide Western Town in the Gila River Indian Community south of Phoenix gives adults and kids the opportunity to play gunslinger or cowboy. The Salt River Pima-Maricopa Indian Community offers several family-focused venues, including Butterfly Wonderland. Or take in arcade action at Cocopah's Wild River Family Entertainment Center or Ak-Chin's UltraStar Multi-tainment Center.



FOSKETT CREATIVE



FOSKETT CREATIVE

Navajo **rugs** have long been prized by collectors and designers for their beauty and the skill of the weavers who painstakingly craft the intricate patterns with wool. You can find these works of art at trading posts across the Navajo Nation, including Hubbell Trading Post National Historic Site in Ganado.



GRACE STUFKOSKY

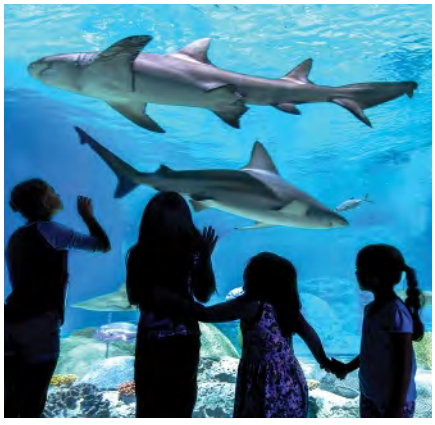
The **Three Sisters**—corn, tepary beans and squash—some of the Southwest's indigenous foods, appear on the menus of both home cooks and top restaurants. Visitors can purchase tepary beans at various venues, including some tribal museum gift shops, such as Huhugam Ki in the Salt River Pima-Maricopa Indian Community, or directly from Ramona Farms in the Gila River Indian Community.

Hit the slopes at the White Mountain Apache's Sunrise Ski Park, one of Arizona's premier downhill **skiing** venues. Enjoy thrilling winter sports and a cool place to laze summer days away, as the park is also open for summer activities. Dine at the Eagles Nest restaurant with menus developed by the White Mountain Apache culinary team.



SUNRISE SKI RESORT

Kids of all ages will be enchanted by the **underwater tunnel** at OdySea Aquarium. In addition to the "reef" tunnel, enjoy frolicking otters, tidal touch pools and a descent into shark territory. It's one of the Salt River Pima-Maricopa Indian Community's newest attractions near Scottsdale.



ODYSEA AQUARIUM



RANDY PRENTICE

Northern Arizona's **views** are among the world's best. Feel the wide blue sky, see the natural, wind-sculpted sandstone monuments and treat your senses to a wide-open world at The View Hotel, overlooking Monument Valley Navajo Tribal Park on the Navajo Nation. Or experience one of the world's natural wonders by simply peering down through the glass walkway at the Hualapai Tribe's Skywalk at Grand Canyon West.



MARK LIPCZYNSKI

American Indians greatly honor their veterans and the wars in which they fought to protect the United States. You can see some of these **war remembrances** at the Navajo Code Talkers Museum in Tuba City. The Poston Memorial Monument, located southwest of Parker, honors Japanese citizens who were unjustly imprisoned on the Colorado River Indian Tribes' land during World War II.

Outside Tucson, pay a visit to the **Yoemem Tekia Cultural Center and Museum** to immerse yourself in the Pascua Yaqui Tribe's history, including learning about the tribe's popular Yaqui Deer Dancers and Easter celebrations.



SEAN PARKER

Named for St. Francis Xavier, **Mission San Xavier del Bac**—or the "White Dove of the Desert"—is one of Arizona's prized structures. This elegant landmark sits in the heart of the Tohono O'odham Nation's historic Wa:k village south of Tucson. A museum on the premises showcases the mission's history, and American Indian artists have their work on display at the San Xavier Plaza.

Zuni fetishes have been painstakingly carved by talented artisans for centuries. The tiny carvings depict animals and icons integral to their culture, and collectors prize the miniature sculptures. See and purchase them during the Zuni Festival at the Museum of Northern Arizona. **AZ**

POSTCARDS FROM ROUTE 66

FOLLOW THE MOTHER ROAD

to build your own story

BY NORA BURBA TRULSSON

Peach Springs' Underground Scene

Took an elevator below the desert to tour Grand Canyon Caverns, a vast, dry cavern filled with otherworldly formations. You can spend the night in a special cavern suite, but we opted for the above-ground motel—adjacent to the bar.

JOSHUA NOBLE-FLICKR



Oatman's Burros & Bandits

This is the ghost town where they have an outdoor egg-frying contest in July, but we also found wild burros (descendants of gold miners' pack animals), plus (staged) gunfights in the streets.

MARK LYPCZYNSKI

158 Miles in Kingman

Browsed through the 5,000-square-foot Historic Route 66 Museum, located in the Powerhouse Visitor Center. Exhibits trace Arizona's unbroken 158 miles of the Main Street of America, including displays about *The Grapes of Wrath* and old storefronts.

JARED 422_80-FLICKR

Williams' Rails & a Road

Grand Canyon Railway chugged us to the national park's South Rim via vintage train. Back in town, we spent the evening exploring shops, restaurants and bars along one of the best-preserved stretches of Route 66 in Arizona.

PICTURE PERFECT

Submit your best Arizona photo, and you could win great prizes! See the monthly themes and learn more at VisitArizona.com/photo-contest.



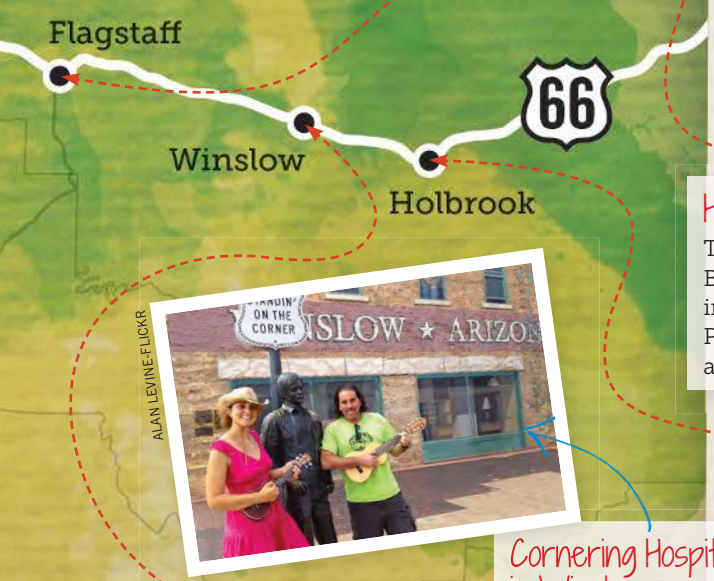
VICTOR SOLANOY-FLICKR

Sundaes & Souvenirs in Seligman

We found sundaes, burgers and tongue-in-cheek humor at Delgadillo's Snow Cap, a 1953 drive-in, then searched for souvenirs at Angel & Vilma's Original Route 66 Gift Shop, a one-time barbershop that's now the epicenter of Route 66 preservation efforts.



ANGEL SCHATZ-FLICKR



History & Nightlife in Flagstaff

Tonight was craft beer and pizza at Mother Road Brewing Company and Pizzicletta, both housed in a 1920s commercial laundry building on Mike's Pike, the original alignment for Route 66. Grabbed a pint of housemade gelato for the road.

ALAN LEVINE-FLICKR

Cornering Hospitality in Winslow

Yup, selfies at The Eagles-referencing Standin' on the Corner Park, then on to elegant, historic La Posada Hotel, designed in 1929 by architect Mary Colter for the Fred Harvey Company. Dinner tonight at the hotel's acclaimed, chef-driven Turquoise Room.



MARK LYPCZYNSKI



LOCO STEVE-FLICKR

10

Holbrook's 1950s Architecture Rocks!

Petrified Forest National Park's geology is mind-boggling, but we also liked its Painted Desert Community Complex, a newly named National Treasure, designed by modernist architect Richard Neutra in 1958. Spent the night at the kitschy-fabulous Wigwam Motel—concrete teepees circa 1950. AZ



WHERE THE PAVEMENT ENDS

Let your quest for adventure lead you off-road

BY A.T. WILLETT

An Arizona off-road adventure offers up the most beautiful and diverse terrain in the Southwest. Climb into a 4x4 or rent one and spend the afternoon crawling over the red rocks of Sedona or creeping down a steep rocky trail to a desert canyon waterfall. Whether you want to ride the volcanic cinder fields where NASA astronauts once trained or travel back in time to old abandoned mining towns, there's a piece of Arizona history down every old wagon trail. While chilly temperatures can shut down outdoor play around the country, Arizona is a destination where you can enjoy outdoor adventures year-round. Plus, the state offers the kind of heart-pounding technical challenges off-roaders dream about. So what are you waiting for? Where the pavement ends, the fun begins.



Broken Arrow Trail, Sedona
A.T. WILLETT

BROKEN ARROW TRAIL • SEDONA

If you've always wanted to be in your very own Jeep commercial, this is the place to shoot the video. One of Arizona's most popular 4x4 trails runs over these steep and narrow red rocks. A popular destination for other four wheelers and guided Pink Jeep Tours, one of the trail highlights is The Devil's Staircase, a steep downhill section of stair-stepped red rocks. The best time to experience this trail is when the sun is low, creating dramatic lighting as you take in the panoramic views of Bell Rock, Chapel Butte or the Rock of Gibraltar. The drive is less than four miles and takes about two to three hours.

ACCESS Turn west off Arizona Highway 179 onto Morgan Road. As it passes through Broken Arrow Estates, it becomes FR 179F.

BOX CANYON TRAIL • WICKENBURG

If you like racing your ATV down a running streambed, this is a great way to stay cool in those hot summer months. The trail follows the Hassayampa riverbed through a narrow box canyon lined with saguaro cacti. You can get as wet and muddy as you want, but you might want to keep your phone in a waterproof case.

ACCESS From Wickenburg, drive north on U.S. Highway 93, turn right on South Rincon Road and continue north. Where the riverbed crosses the road a second time, the trail begins.



Pink Jeep Tours, Sedona
A.T. WILLETT

HOP IN THE PASSENGER SEAT

Want a worry-free adventure? Take a professionally guided, off-road tour from one of these Arizona businesses.

- **Arizona Hummer Tours, Phoenix** Group size: 4–20 guests. Offers hotel pickup and drives custom-outfitted H1 Hummers and Polaris Ranger SxSs. Tours are within 50–60 miles of Phoenix and take 3–5 hours. azhummertours.com, (602) 692-7124
- **Arizona Offroad Tours, Camp Verde** Group size: 2–12 guests. Drives ATVs and four-seat SxS OHVs. Tours take 2–2.5 hours, and the most popular tour is Cherry Creek in Sedona. arizonaoffroadtours.com, (928) 451-1777, (928) 300-4344
- **Happy Trails ATV OHV Rentals, Wickenburg** Rents ATVs and four-seat SxS OHVs. Offers guided tour options. happytrailsaz.com, (602) 577-5167
- **Pink Jeep Tours, Sedona** Group size: unlimited guests. Drives custom-built Pink Jeep Wranglers and has been driving the trails of Sedona for more than 50 years. pinkjeeptourssedona.com, (800) 873-3662
- **Trail Dust Offroad Tours, Tucson** Group size: 2–120 guests. Offers hotel pickup and drives restored classic CJ Scrambler Jeeps. Operates on a private ranch in the Rincon Mountains. Offers special ecology tours, cowboy cookouts and team-building tours. traildustoffroadtoursinc.com, (520) 747-0323, (520) 748-7094

MAVERICK TRAIL • SHOW LOW, WHITE MOUNTAINS (50-INCH WIDTH LIMITATION)

When summer temperatures begin to climb, take a cool motorcycle ride through the ponderosa pines on the Maverick Trail. At an elevation above 6,000 feet, this 50-mile trail offers stunning views of the White Mountains and connects the town of Clay Springs to Pinetop. Made for motorcycle, ATV and OHV use, it's narrow—with a 50-inch width limitation—but plans to widen and extend the trail are in the works.

ACCESS Maverick Trail has five access points. Find detailed maps online at azstateparks.com/ohv.

CHIVA FALLS TRAIL • REDINGTON PASS, TUCSON

It may be difficult to get there, but this ride ends at a stunning 75-foot-tall waterfall located on the north side of the Rincon Mountain Wilderness Area. With a high-clearance 4x4 or OHV, you can traverse rolling hills with steep, rocky ascents and descents through normally dry streambeds. To reach the falls, you will need to clear the first technical challenge, a slab rock area called Three Feathers. Once you reach your destination, cool off with a dip at the base of the falls, which flow July through September.



Off-roading in Phoenix
ARIZONA STATE PARKS & TRAILS



Chiva Falls Trail, Tucson
A.T. WILLETT

ACCESS Drive to the end of Tanque Verde Road. After the dry wash, the road becomes AZ Hwy. 371/Redington Road. Head up the road five miles, taking a right turn onto #4417, where a cattle guard marks the entrance to the trail.

CINDER HILLS OHV RECREATIONAL AREA • FLAGSTAFF

What would it be like to ride on the moon? In the 1960s, NASA scientists asked the same question. In response, NASA bombed craters into Cinder Lake, a basaltic cinder field, which is now a small section of this very popular 13,500-acre OHV area in Northern Arizona. Apollo 15 astronauts learned how to drive the Lunar Roving Vehicle in the same location you can ride today. One Hundred Dollar Hill is the most challenging route to the top of these barren, black and storied hills.

ACCESS Junction of U.S. Highway 89 and FR 776, 12 miles north of downtown Flagstaff.

DRIPPING SPRINGS TRAIL • QUARTZSITE

If you want to reach Dripping Springs, you'll need to bring your navigational skills along for the ride. To soak up the surrounding history, bring a GPS and map to guide you. The narrow, and sometimes steep, trail will take you through picturesque fields of



golden cholla and prehistoric rock art, pecked or etched into rock formations thousands of years old. Since temps can soar in the summer, save this route for the cooler months.

ACCESS Take Interstate 10 to exit 26, Golden Nugget Road, eight miles east of Quartzsite. Head southeast on an unimproved road and turn right after 0.4 miles. Look for a yellow "Primitive Road" sign.

MAKE A PLAN

You can start planning your next off-road adventure by researching new trails online. The Arizona State Parks & Trails website (azstateparks.com/ohv) has information on the state's trails, off-road regulations and licensing requirements. Before you begin your journey, research your destination, print a map and, better yet, bring along a handheld GPS so you will always know your location. By traveling in groups, you will ensure your own and others' safety, and if you get stuck or break down, help will already be with you. Remember to bring plenty of food and water, proper clothing and off-road rescue gear, including: a Hi-Lift Jack, folding shovel, tow strap, jumper cables and tools for roadside repairs. Arizona weather can turn extreme with little notice, so take a look at the forecast before starting out. Plan your adventure, be prepared and get ready to have some fun. **AZ**



Hassayampa River Box Canyon
A.T. WILLETT

MAKE THE DUST FLY

Show everyone just how far off road your adventure takes you. Tag your photos with #AZOffRoad.

BY THE LETTER



4x4
4-wheel-drive sport utility vehicle or truck



ATV
all-terrain vehicle



SxS
side-by-side buggy



LRV
Lunar Roving Vehicle



OHV
off-highway vehicle

SONORAN ROSE PRICKLY PEAR VODKA

Raise your spirits with Sonoran Rose Prickly Pear Vodka. This vodka is exclusively distilled in Flagstaff, where the owners of Canyon Diablo Spirits have perfected the art of combining the sweet fruit of the prickly pear with locally made vodka. This Northern Arizona original pairs well in many of your favorite drinks—try it in cosmos, martinis and mules.



AMY HASKELL

CACTUS BITES

Discover culinary interpretations of Arizona's greatest icon

BY ELISE McCLAIN

Arizona's relationship with the cactus is centuries old. It ties people and their cultures to the land. Yes, you can see cacti in all their various shapes and sizes scattered throughout Arizona, but one unique and rarely acknowledged means of experiencing cacti is through the palate. Discover Old World and contemporary culinary interpretations of Arizona's greatest icon.

Find many local culinary options around Arizona as well as the unqiue restaurants mentioned here at **expeditionfoodieaz.com.**



SAGUARO FRUIT WARES

Join in a traditional cactus harvest. Held every June in the Sonoran Desert south of Tucson, the Ha:san Bak Saguaro Harvest Festival celebrates the native saguaro cactus. Culturally and historically significant to the region, the saguaro is Arizona's best-known cactus and state plant. Along with the fresh-picked saguaro cactus fruit, Ha:san Bak offers other indigenous foods, archaeological hikes and hands-on demonstrations.



AMY HASKELL

PRICKLY PEAR GELATO

East of Phoenix lies the state's smallest official community, Tortilla Flat. And one of the town's original structures from the 1940s, the Tortilla Flat Country Store and Ice Cream Shop, is rich with Arizona history. Peruse the gift shop and grab a bite of the locally acclaimed prickly pear gelato served with a side of Western nostalgia.

PRICKLY PEAR CANDY

Cheri's Desert Harvest, a Tucson business, offers a large selection of edible cactus products ranging from jams and jellies to preserves and candies. One of Cheri's best-sellers include regionally renowned prickly pear cactus candies. These gummy candies are made from the handpicked fruit of the prickly pear cactus and make for a sweet Arizona momento.



AMY HASKELL

PRICKLY PEAR MAPLE SYRUP

Phoenix's Vovomeena restaurant specializes in serving authentically crafted coffee, breakfast and brunch. Don't pass up the Arizonan interpretation of johnnycake—two corn and chile cakes topped with prickly pear maple syrup and served with sweet rice and your choice of meat or potatoes.



AMY HASKELL

NOPALES BURRITOS

Intimate and rustic, Maya Mexican Restaurant in Prescott offers a vast array of authentic Mexican food for a great price. Among vegetarian options are nopales (or prickly pear cactus) breakfast burritos, which include eggs, onions and tomatoes. The combination nopales con huevo platter features the grilled cactus plus rice, beans, chips and salsa.



AMY HASKELL



MARK LIPCZYNSKI

CHOLLA BUDS

Kai Restaurant is one of Arizona's premiere fine-dining restaurants and is located in the Gila River Indian Community near Chandler. Kai means "seed" in the American Indian Pima language. Drawing from American Indian culture, Kai utilizes indigenous Southwest ingredients—cactus buds and blossoms are prominent on the menu. Try the grilled tenderloin of Tribal buffalo served with a smoked corn purée, cholla buds, chorizo and scarlet runner bean chili, and saguaro blossom syrup to get a true taste of these uncommon ingredients.

CACTUS FRIES

Nestled among the Red Rocks of Sedona, the Cowboy Club offers a variety of Southwestern and cowboy fare, with a view to boot. Among the most popular appetizers are the cactus fries. Flash fried and served with prickly pear sauce, these dippers are a unique take on the classic nopal.



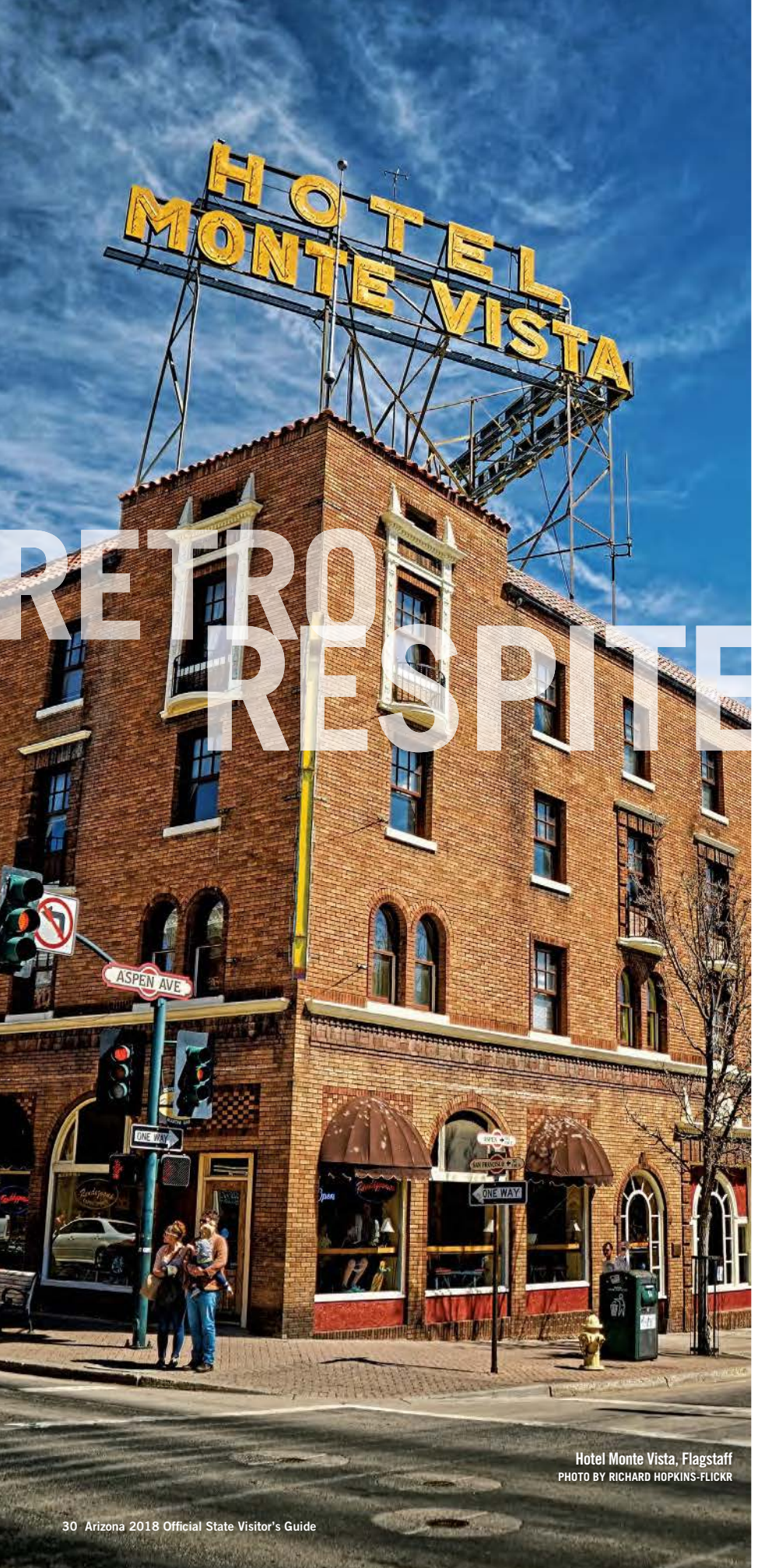
JULIE FOSKETT



JULIE FOSKETT

PRICKLY PEAR MARGARITA

Kick back and relax in Yuma where guests are invited to enjoy an Arizona take on a Southwestern classic: the margarita. Stop by The Patio Restaurant and Bar where prickly pear margaritas are served daily. By mixing traditional margaritas with prickly pear syrup, The Patio has found a sweet, thirst-quenching drink to satisfy even the saltiest patron. AZ



Hotel Monte Vista, Flagstaff
PHOTO BY RICHARD HOPKINS-FLICKR

RETRO RESPITE

Slumber in style at these lodging gems

BY EDIE JAROLIM

A decade of widespread prosperity, the 1920s saw an influx of visitors to Arizona—and the creation of several distinctive hotels to welcome them. The state's history of hospitality can be traced through four of the era's architectural gems that are still thriving today. All hosted a veritable Who's Who of American society over the years, including presidents and Hollywood royalty.

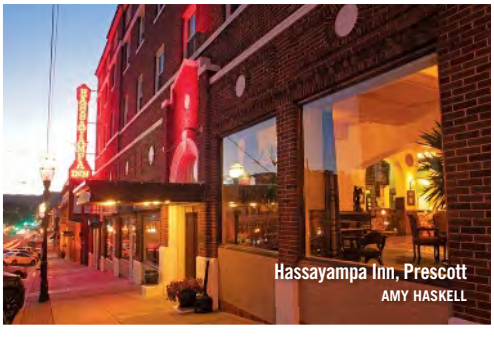
Rough-and-tumble Flagstaff was already enjoying the tourism benefits of being on the Atchison, Topeka and Santa Fe railway line when the completion of a stretch of Route 66 through town made this gateway to the Grand Canyon more popular than ever—and more in need of a grand hotel. A fundraiser that enlisted the help of everyone from Lowell Observatory astronomer, VM Slipher, to Western novelist, Zane Grey, resulted in the building of the **Hotel Monte Vista** (visitarizona.com/business/hotel-monte-vista), which opened on New Year's Day 1927. Its title of the longest publicly held hotel in the U.S.—it was originally named the Community Hotel—belies the Monte Vista's colorful past. The rooms are named for the many celebrities who came to stay and drink on this "lawless" strip during Prohibition and afterward, among them John Wayne and Carole Lombard. An early exercise in recycling, the imposing brick structure merged a post office and the building housing the *Coconino Sun* newspaper. Among the details showcasing the Spanish Colonial-revival style interior are the arched entryway into the cocktail lounge and the Art Deco buttons on the Otis elevator, still in operation today.



Arizona Biltmore, Phoenix
COURTESY ARIZONA BILTMORE



Arizona Biltmore, Phoenix
AMY HASKELL



Hassayampa Inn, Prescott
AMY HASKELL



Hassayampa Inn, Prescott
AMY HASKELL

An increase in car travel also had an impact on nearby Prescott, the on-again, off-again territorial capital of Arizona (1864–1867 and 1877–1889); its imposing central square and abundance of Victorian homes harken back to the town's historic role. Spurred by former Mayor Morris Goldwater to create accommodations fit for genteel visitors, Prescott raised money to build the **Hassayampa Inn** (visitarizona.com/business/hassayampa-inn) near Courthouse Square by selling shares in the enterprise for $1 each. Opened on November 20, 1927, as the Hassayampa Motor Hotel, this automotive-oriented lodging introduced the porte cochere (covered entryway) to Arizona. Acceding to the stockholders' wishes to make the building more appealing to visitors from the Midwest, architect Henry Trost changed the rounded Southwestern-style exterior to the more conventional red brick but retained the soaring bell tower. Inside, hand-painted Pueblo-Deco ceiling beams, wrought iron chandeliers and terra cotta tiles let you know you're in Arizona—as does the legend that cowboy star Tom Mix rode his horse into the hotel.

The pine forests of the north were familiar to most visitors in the 1920s, but Southern Arizona's Sonoran Desert terrain was largely terra incognita. Luckily, Albert Chase McArthur embraced the aesthetic of his mentor and teacher Frank Lloyd Wright when he designed the **Arizona Biltmore** (visitarizona.com/business/arizona-biltmore) in 1929, working to highlight the ruggedly beautiful landscape of Phoenix rather than fighting against it. He built



Arizona Inn, Tucson
COURTESY ARIZONA INN



Arizona Inn, Tucson
AMY HASKELL

the exclusive getaway from pre-cast blocks made on-site from desert sand, their geometric patterns evoking palm trees, and preserved as many cacti on the property as possible. Privately owned—chewing-gum magnate and Chicago Cubs owner William Wrigley Jr. became the sole proprietor in 1930—it was available for stays by invitation only for several decades. Marilyn Monroe was among the guests who splashed around the Catalina Pool and Irving Berlin composed *White Christmas* while sitting at its edge. Wright's influence on the resort was enhanced in the 1970s, when Taliesin Associated Architects, the firm Wright established in Scottsdale, renovated the resort, adding Wright-inspired designs to the lobby rugs, among other details.

While political luminaries frequented all the hotels featured here, Tucson's **Arizona Inn** (visitarizona.com/business/arizona-inn) was also built by one: Isabella Greenway, Arizona's first congresswoman and a lifelong friend of Eleanor Roosevelt. She came up with the idea for a homey yet luxurious retreat in the late 1920s but started construction in 1930, by which time the stock market had crashed. Greenway helped maintain jobs for disabled World War I veterans at her Arizona Hut cabinet-making shop by having them craft all of the inn's furniture. The sprawling lodging complex, composed of 25 low-slung structures on 14 gorgeously landscaped acres—the plants are mostly Arizona natives—is still notable for its pink stucco exteriors. Now, however, the inn is a historic landmark in the heart of town, rather than a newly established gathering spot for movers and shakers at its outskirts. Movers and shakers still confab at the Audubon Bar, known for original art prints and live piano music; the furniture is still made and restored by master crafters on the premises; and the Inn remains in the same family, four generations later. AZ

CHEERS!

Learn more about local distilleries offering exclusive spirits at **ExpeditionFoodieAZ.**

BRIDGING THE GAP

Building a world-class hotel to promote tourism in a town might be considered ambitious but well within the realm of standard industry practices. Buying and transporting a bridge across an ocean? That's off the marketing charts. Yet that's precisely what Robert McCulloch did for Lake Havasu City.

McCulloch's ambitions began with founding the city in the first place. The small-motor manufacturer—he made much of his fortune producing chainsaws—turned a World War II Army Air Corps landing field and convalescent camp into a planned community, officially incorporated in 1964. And when the city of London put an 1830s bridge that was sinking into the Thames up for auction in 1968, McCulloch bought it for just over $2.4 million. He then spent another $7 million to have it moved to Arizona, block by granite block. The London Bridge was reconstructed on a narrow channel of Lake Havasu.



Were the time and expense worth it? The Lord Mayor of London attended the ribbon-cutting ceremony for the bridge on October 10, 1971, and the event grabbed the attention of the international press. English village-style shops cropped up around the span; the population of Lake Havasu City grew from some 8,000 in 1971 to around 52,000 today; and people still want to go to "that place in the desert that has the London Bridge." So the answer to that question would be a definitive "Yes."

AZ Date Book 2018

Mark your calendar for these not-to-be-missed annual events

JANUARY

Barrett-Jackson Classic Car Auction SCOTTSDALE (480) 421-6694, barrett-jackson.com

Gathering of the Gunfighters YUMA (928) 783-4771, gatheringofthegunfighters.com

Native Trails, Presented by the Fort McDowell Yavapai Nation SCOTTSDALE (480) 421-1004, experiencescottsdale.com

Quartzsite Pow Wow Gem & Mineral Show QUARTZSITE (928) 927-6325, qiaarizona.org

Rock 'n' Roll Arizona Marathon & ½ Marathon PHOENIX (800) 311-1255, runrocknroll.com/arizona

Tohono O'odham Nation Rodeo & Fair SELLS (520) 383-2588, www.tonation-nsn.gov

Waste Management Phoenix Open SCOTTSDALE wmphoenixopen.com

Wings Over Willcox WILLCOX (520) 384-2272, wingsoverwillcox.com

Yuma Territorial Marathon YUMA (928) 343-1715, yumamarathon.com

FEBRUARY

Arizona Renaissance Festival GOLD CANYON (520) 463-2600, royalfaires.com/arizona

Chocolate Affaire GLENDALE (623) 930-2299, glendaleaz.com

Cochise Cowboy Poetry & Music Gathering SIERRA VISTA (520) 508-9359, cowboypoets.com

Gold Rush Days WICKENBURG (928) 684-5479, visitwickenburg.com

Great Fair FOUNTAIN HILLS (480) 837-1654, fountainhillschamber.com

International Film Festival & Workshop SEDONA (928) 282-1177, sedonafilmfestival.org

La Fiesta de los Vaqueros—Tucson Rodeo & Parade TUCSON (800) 964-5662, tucsonrodeo.com

Lost Dutchman Days APACHE JUNCTION (602) 463-0008, lostdutchmandays.org

Parker 425 Off-Road Race PARKER (928) 669-2174, parkeraz.org

Scottsdale Arabian Horse Show SCOTTSDALE (480) 515-1500, scottsdaleshow.com

Tour of Historic Florence FLORENCE (520) 868-7699, florenceaz.gov

Tubac Festival of the Arts TUBAC (520) 398-2704, tubacaz.com

Tucson Gem & Mineral Show TUCSON (520) 322-5773, tgms.org

Winter Blast LAKE HAVASU CITY (800) 242-8278, golakehavasu.com

World Championship Hoop Dance Contest PHOENIX (602) 252-8848, heard.org

MARCH

Cactus League Spring Training GREATER PHOENIX cactusleague.com

Camping World 500 AVONDALE (866) 408-7223, phoenixraceway.com

Cowgirl Up! Art from the Other Half of the West Invitational Exhibition & Sale WICKENBURG (928) 684-2272, westernmuseum.org

Heard Museum Guild Indian Fair & Market PHOENIX (602) 252-8848, heard.org

Mul-Chu-Tha Fair & Rodeo SACATON (520) 562-9793, mul-chu-tha.com

Ostrich Festival CHANDLER (480) 588-8497, ostrichfestival.com

Tres Rios Nature Festival AVONDALE (623) 333-2400, tresriosnaturefestival.com

Wa:k Pow Wow TUCSON waknet.org

APRIL

Blessing of Sonoita Vineyards ELGIN (520) 455-5893, sonoitavineyards.com

Charles Mingus Hometown Jazz Festival NOGALES (520) 287-3685, mingusproject.com

Country Thunder FLORENCE (866) 802-6418, countrythunder.com



MARKSONTOK-FLICKR

Gold Rush Days, February, Wickenburg



Grand Canyon Star Party, June, Grand Canyon

MICHAEL QUINN-GRAND CANYON NPS-FLICKR

El Tour de Mesa
MESA (520) 745-2033, perimeterbicycling.com

Jesus the Christ Easter Pageant MESA
easterpageant.org

La Frontera Tucson International Mariachi Conference TUCSON
tucsonmariachi.org

Pow Wow at ASU—Spring Competition TEMPE
powwow.asu.edu

Verde Valley Birding and Nature Festival COTTONWOOD
(928) 282-2202, birdyverde.org

MAY

Agave Heritage Festival
TUCSON hotelcongress.com

Cinco de Mayo Fiesta
SEDONA tlaq.com

Desert Storm Poker Run and Shootout LAKE HAVASU CITY
golakehavasu.com

Great Fort Apache Heritage Celebration
FORT APACHE (928) 338-4625, fortapachearizona.org

Historic Home & Building Tour JEROME (928) 634-2900, jeromechamber.com

Phippen Museum Western Art Show & Sale
PRESCOTT (928) 778-1385, phippenartmuseum.org

Route 66 Fun Run
SELIGMAN/TOPOCK (928) 753-5001, azrt66.com

Southwest Wings Spring Fling SIERRA VISTA
swwings.org

Zuni Festival of Arts & Culture FLAGSTAFF
(928) 774-5213, musnaz.org

JUNE

Alpine Country Blues Festival ALPINE (928) 245-1143, alpineazmusicfest.com

Cowpunchers Reunion Rodeo WILLIAMS
azcowpunchers.com

Grand Canyon Star Party
GRAND CANYON NORTH AND SOUTH RIMS (520) 546-2961, tucsonastronomy.org

Great Western Tube Float
PARKER (928) 669-2174, parkeraz.org

High Mountain Music Festival
PINETOP-LAKESIDE (928) 367-4290, pinetoplakeside chamber.com

Prescott Frontier Days & World's Oldest Rodeo
PRESCOTT (928) 445-3103, worldsoldestrodeo.com

Sheep Is Life TSAILE
(505) 406-7428, navajolifeway.org

JULY

Hopi Festival of Arts & Culture FLAGSTAFF
(928) 774-5213, musnaz.org

Kayenta 4th of July Rodeo
KAYENTA kayentatownship-nsn.gov

Navajo Nation Fourth of July Celebration PRCA Pro Rodeo & Fair WINDOW ROCK
(928) 871-6478

Old West Days & Bucket of Blood Races
HOLBROOK (928) 524-6558, holbrookchamber.com

Pioneer Day Celebration
SNOWFLAKE (928) 536-4331, snowflaketaylorchamber.org

Prescott Indian Art Market
PRESCOTT (928) 445-3122, sharlot.org

Sidewalk Egg Frying Challenge OATMAN
(928) 768-6222, oatmangoldroad.org

AUGUST

Arizona Cowboy Poets Gathering
PRESCOTT (928) 713-6323, azcowboypoets.org

Eagar Days EAGAR
(928) 333-4128, eagaraz.gov

Hopi 10K & 5K ORAIVI
(928) 401-0821, runhopi.com

Mountain Artists Guild Summer Festival of Fine Art & Crafts PRESCOTT
mountainartistsguild.com

Navajo Festival of Arts & Culture FLAGSTAFF
(928) 774-5213, musnaz.org

Southwest Wings Birding & Nature Festival
SIERRA VISTA swwings.org



ARIZONA OFFICE OF TOURISM

YOUR ONLINE GUIDE

To search a full list of events around the state, see **VisitArizona.com.**

World's Oldest Continuous Rodeo—August Doins Rodeo PAYSON
paysonprorodeo.com

SEPTEMBER

Andy Devine Days PRCA Rodeo KINGMAN
kingmanrodeoaz.com

Arizona Restaurant Week STATEWIDE
arizonarestaurantweek.com

Fall Artisans Festival PINETOP-LAKESIDE
(928) 367-4290,
pinetoplakesidechamber.com

Fiesta del Tlaquepaque SEDONA (928) 282-4838,
tlaq.com

Navajo Nation Fair WINDOW ROCK (928) 871-6478,
facebook.com/
navajonationfair

SalsaFest SAFFORD
salsatrail.com

Standin' on the Corner Festival WINSLOW (928) 289-2434,
winslowarizona.org

Vertielee Floyd Memorial Old Time Fiddlers Arizona State Championship PAYSON (928) 474-4515,
paysonrimcountry.com

White Mountain Apache Tribal Fair & Rodeo WHITERIVER facebook.com/
wmatfair, wmatfair.com

OCTOBER

Anza Days TUBAC
(520) 398-2252,
tubacpresidio.org

Apache Jii Day GLOBE/MIAMI (928) 425-4495,
globemiamichamber.com

Bisbee 1000—The Great Stair Climb BISBEE
(520) 266-0401, bisbee1000.org

Butterfield Overland Stage Days & Rodeo BENSON (520) 586-4293,
bensonvisitorcenter.com

Celebraciones de la Gente FLAGSTAFF (928) 774-5213,
musnaz.org

Cochise County Cycling Classic DOUGLAS (520) 745-2033,
perimeterbicycling.com

Copper State Fly-In MESA copperstate.org

CRIT Native American Days Fair & Expo PARKER (928) 669-9211,
facebook.com/
ColoradoRiverIndianTribe

Fall Festival—A Celebration of Music & Art PATAGONIA (520) 345-4172,
patagoniafallfestival.com

Fort Verde Days CAMP VERDE
visitcampverde.com

Helldorado Days TOMBSTONE (520) 457-9317,
tombstonechamber.com

International Jet Sports Boating Association World Finals LAKE HAVASU CITY
(928) 453-3444,
golakehavasu.com

Relics & Rods Run to the Sun LAKE HAVASU CITY
(928) 855-0933,
golakehavasu.com

Tuuvi Gathering MOENKOPI (928) 283-4500,
experiencehopi.com

NOVEMBER

All Souls Procession TUCSON allsoulsprocession.org

Colorado River Crossing Balloon Festival YUMA caballeros.org

El Tour de Tucson TUCSON (520) 745-2033,
perimeterbicycling.com

Florence Junior Parada Rodeo FLORENCE
florencejrparadarodeo.com

Glendale Glitters GLENDALE (623) 930-2299,
glendaleaz.com

Ironman Arizona TEMPE
ironmanarizona.com

NASCAR Sprint Cup 500 AVONDALE (866) 408-7223,
phoenixraceway.com

Orme Dam Victory Days FORT MCDOWELL
(480) 789-7107, fmyn.org

Page Lake Powell Hot Air Balloon Regatta PAGE (928) 645-2741,
lakepowellballoonregatta.com

Veterans Memorial Fair & Rodeo SAN CARLOS
(928) 475-2361,
apache-gold-casino.com

DECEMBER

Arizona Christmas Parade & Courthouse Lighting Ceremony PRESCOTT
(928) 445-2000, prescott.org

Cactus Bowl PHOENIX
(480) 350-0911,
fiestabowl.org

Fall Festival of the Arts TEMPE (480) 355-6061,
tempefestivalofthearts.com

Fiesta Bowl GLENDALE
(480) 350-0911,
fiestabowl.org

Fiesta Bowl Parade PHOENIX (480) 350-0911,
fiestabowl.org

Fourth Avenue Winter Street Fair TUCSON
(520) 624-5004,
fourthavenue.org

The Great Pinecone Drop FLAGSTAFF (928) 779-1919,
weatherfordhotel.com

Pueblo Grande Museum Indian Market PHOENIX
(602) 495-0901,
pueblogrande.org



All Souls Procession, November, Tucson

KATIE MOORE

PHOENIX
& CENTRAL ARIZONA

EXPERIENCE BOTH A CITY VIBE AND THE SURROUNDING DESERT BEAUTY IN ARIZONA'S URBAN CORE

BY **ELENA ACOBA**

MAKE FAMILY MEMORIES

Kids and their parents will love the family experiences in Central Arizona. Ply the waters of **Canyon Lake,** near Tortilla Flat, aboard the ***Dolly Steamboat,*** which runs tours and sunset dinner cruises.

At the **McCormick-Stillman Railroad Park** in Scottsdale, young ones and their adults can take a train trip on a narrow-gauge railroad or ride a beautifully carved carousel horse. Mesa's **Riverview Park** provides lots of room to climb, slide, run, splash and fish.

Find more hands-on fun in Phoenix at the four-story **Arizona Science Center** and the fun learning environment at the **Children's Museum of Phoenix.**

Broaden your knowledge by learning about planet Earth at **Biosphere 2** in Oracle and prehistoric life at the **Arizona Museum of Natural History** in Mesa.

Get close to animals from around the world at **OdySea Aquarium,** Greater Phoenix's newest animal attraction. As the largest aquarium in the Southwest, it features creatures from the world's oceans, rivers and shores.

The aquarium is next door to Scottsdale's **Butterfly Wonderland,** which boasts the largest butterfly pavilion in the United States. You can also get close to honeybees and other desert insects.

Big-truck tours of **Rooster Cogburn Ostrich Ranch,** at Picacho Peak, let you get eye to eye with the giant bird, as well as with lorikeets, deer, goats and donkeys.

More than 1,400 animals from around the world live in the **Phoenix Zoo,** while the **Wildlife World Zoo, Aquarium & Safari Park** in Litchfield Park is home to 600 species, some that roam freely through the park.

Greater Phoenix is home to many professional sports. Take in games with the **Arizona Diamondbacks** (baseball), **Arizona Cardinals** (football), **Arizona Rattlers** (arena football), **Arizona Coyotes** (hockey), **Phoenix Suns** (men's basketball), **Phoenix Mercury** (women's basketball) and **Phoenix Rising** (soccer).



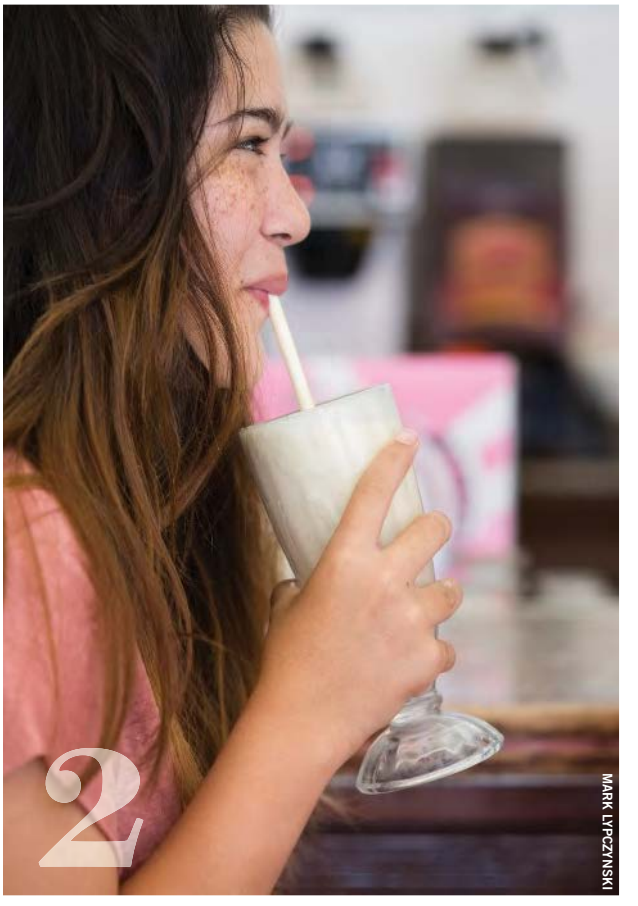
THE ROAD LESS TRAVELED

Venture off the main drag to explore some of these gems of the Phoenix & Central Arizona region.

- South Mountain Park and Preserve, Phoenix
- Old West Wickenburg, Wickenburg
- Apache Trail Scenic Drive, Apache Trail
- Boyce Thompson Arboretum State Park, Superior
- Musical Instrument Museum (MIM), Phoenix
- Heard Museum, Phoenix
- Casa Grande Ruins National Monument, Coolidge
- Fresh Foodie Trail, Mesa
- Desert Botanical Garden, Phoenix
- Thursday Night ArtWalk, Scottsdale
- Cerreta Candy Company, Glendale



ROBERT SILBERBLATT


2
MARK LYPCZYNSKI



3
JULIE FOSKETT


4
ROBERT SILBERBLATT


5
ROBERT SILBERBLATT

1 Downtown Phoenix

2 Sugar Bowl, Scottsdale

3 Scottsdale Art Walk

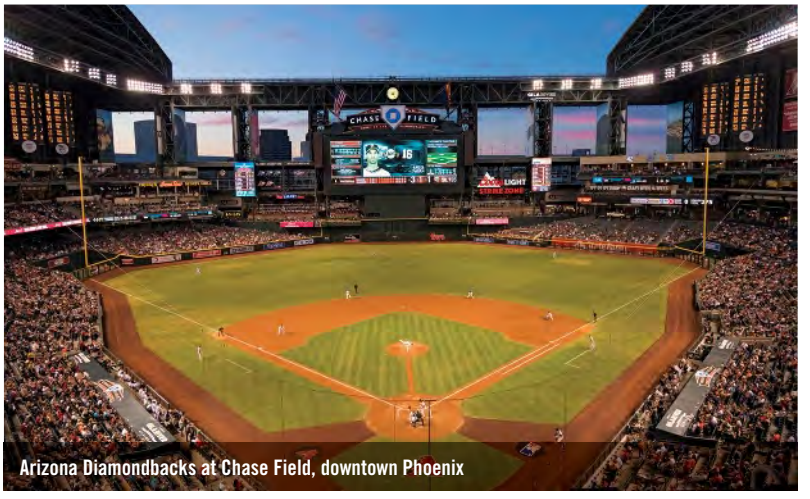
4 University of Phoenix Stadium, Glendale, home of the Arizona Cardinals

5 Tonto National Forest, near Apache Junction

Although the hometown baseball team is the Arizona Diamondbacks, Major League Baseball is around Greater Phoenix nearly year-round. The area hosts **Cactus League Spring Training,** with 15 teams playing at professional stadiums in eight cities. In October, MLB fires up its **Arizona Fall League** featuring top prospects from every team.

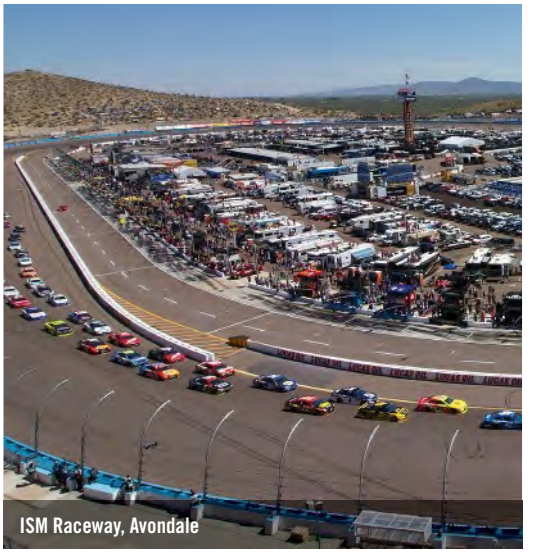
ISM Raceway in Avondale hosts several NASCAR events, as well as the exciting **Phoenix Grand Prix.** Professional golf's top players gather for the annual winter **Waste Management Phoenix Open** at TPC Scottsdale, which sports the largest galleries on the tour.

KERRICK JAMES



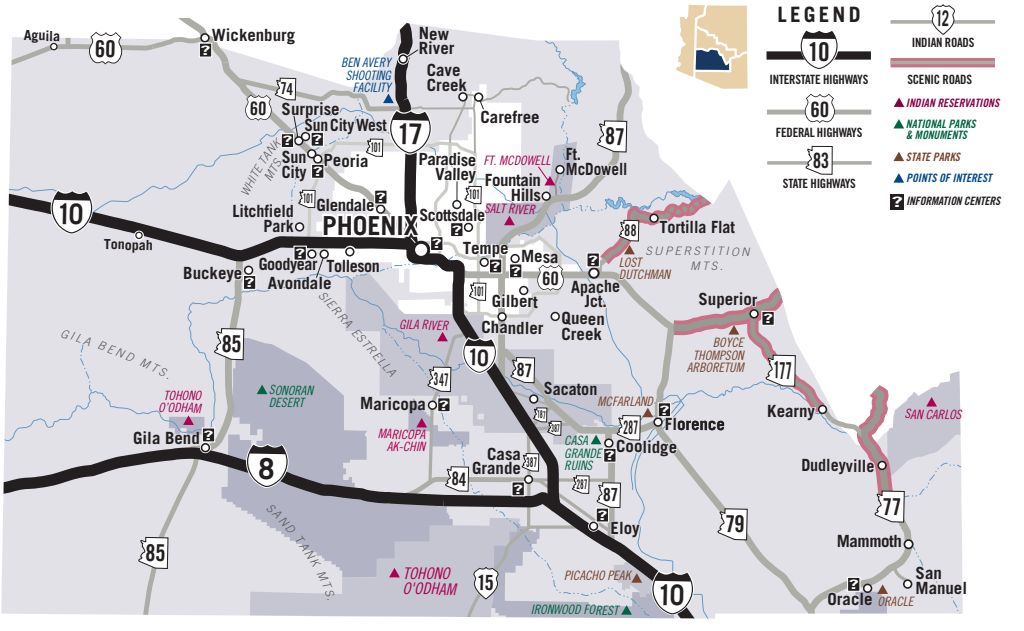
Arizona Diamondbacks at Chase Field, downtown Phoenix

COURTESY ISM RACEWAY



ISM Raceway, Avondale

In Central Arizona, shopping can be a destination, not just an activity. Find luxury brands, fine restaurants and concierge services at **Biltmore Fashion Park, Scottsdale Quarter, Scottsdale Fashion Square** and **Chandler Fashion Center.** Depending on the location, you'll also find salons, day spas, movie theaters and splash pads.



CITY	POP.	ELEV. (IN FEET)
AGUILA	798	2,162
APACHE JUNCTION	35,840	1,722
ARIZONA CITY	10,475	1,509
AVONDALE	76,238	974
BUCKEYE	50,876	869
CAREFREE	3,363	2,382
CASA GRANDE	48,571	1,398
CAVE CREEK	5,015	2,126
CHANDLER	236,123	1,214
COOLIDGE	11,825	1,427
EL MIRAGE	31,797	1,145
ELOY	16,631	1,555
FLORENCE	25,536	1,489
FOUNTAIN HILLS	22,489	1,604
GILA BEND	1,922	735
GILBERT	208,453	1,237
GLENDALE	226,721	1,152
GOODYEAR	65,275	968
GUADALUPE	5,523	1,234
KEARNY	1,950	1,860
LITCHFIELD PARK	5,476	1,030
MAMMOTH	1,426	2,359
MARICOPA	43,482	1,175
MESA	439,041	1,240
ORACLE	3,686	4,524
PARADISE VALLEY	12,820	1,342
PEORIA	154,065	1,142
PHOENIX	1,445,632	1,086
PICACHO	471	1,614
QUEEN CREEK	26,361	1,404
RED ROCK	2,169	2,851
SAN MANUEL	3,551	3,451
SCOTTSDALE	217,385	1,257
SUN CITY	37,499	1,142
SUN CITY WEST	24,535	1,234
SUN LAKES	13,975	1,194
SUPERIOR	2,837	2,841
SURPRISE	117,517	1,175
TEMPE	161,719	1,181
TOLLESON	6,545	1,014
TONOPAH	60	1,122
WICKENBURG	6,363	2,057
YOUNGTOWN	6,156	1,138



Arizona's Premier Shopping Destinations.

SCOTTSDALE FASHION SQUARE

Cartier
Gucci
Louis Vuitton
Neiman Marcus
Salvatore Ferragamo

The Best Address Keeps Getting Better - Luxury Expansion Debuts 2018
FashionSquare.com
QUESTIONS? TEXT CONCIERGE. 480.568.5568

BILTMORE FASHION PARK

Jo Malone London
lululemon athletica
Macy's
Saks Fifth Avenue
Sephora

ShopBiltmore.com
QUESTIONS? TEXT CONCIERGE. 602.428.8220

KIERLAND COMMONS

Arhaus
Athleta
Madewell
Sundance
Vera Bradley

KierlandCommons.com
QUESTIONS? TEXT CONCIERGE. 480.386.6020

CHANDLER FASHION CENTER

Apple
Kendra Scott
Macy's
Nordstrom
Pottery Barn

ShopChandlerFashionCenter.com
QUESTIONS? TEXT CONCIERGE. 480.526.9200

LA ENCANTADA

Anthropologie
Apple
Kate Spade
Michael Kors
Tiffany & Co.

LaEncantadaShoppingCenter.com
QUESTIONS? TEXT CONCIERGE. 520.276.3800

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FashionSquare.com/Savings
ShopBiltmore.com/Savings
KierlandCommons.com/Savings
ShopChandlerFashionCenter.com/Savings
LaEncantadaShoppingCenter.com/Savings

MARK LYPCZYNSKI



Blanco Tacos + Tequila at Biltmore Fashion Park, Phoenix

Experience local life at these neighborhood entertainment and shopping districts: historical **Old Town Scottsdale,** vintage **Melrose District** in Phoenix and artsy **Roosevelt Row** in Phoenix. Find a treasure at **Old Towne Glendale,** known for its antique stores.

Combine shopping and dining with stage and movie entertainment and ice skating at the **Arrowhead Entertainment District** in Peoria. The **Westgate Entertainment District** in Glendale is the home of the Arizona Coyotes and hosts major sporting and concert events with plenty of dining and shopping to do in between.

FUN WITH FOOD

Add a locally made treat to your shopping list. The **Queen Creek Olive Mill** harvests olives from its own on-site grove, where you can picnic. **Joe's Farm Grill** in Gilbert grows many of its ingredients right on the adjacent farm. You can

JILL RICHARDS



Biking along the paved paths in Tempe



• GO GLENDALE •

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you'll love every moment of your visit.**

See why Glendale was named the #1 Emerging Tourist Destination in the U.S. by Trivago.



7:05 a.m.



10:45 a.m.



1:30 p.m.



6:15 p.m.

VisitGlendale
ARIZONA

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find local produce and products at several farmers markets or pick your own at **Schnepf Farms** in Queen Creek.

Dine like a local. **Durant's,** in Phoenix, has been serving hungry steak fans for more than 65 years. **Miss White's Golden Rule Café,** in Phoenix, has been around since the 1960s, offering Southern-style soul food. Finish up with a sweet dessert at **Sugar Bowl** in Scottsdale, serving ice cream, pastries and candies since 1958.

Savor many more unique dining options. When in Phoenix, chow down on a cowboy steak at **Rustler's Rooste** and hot and spicy Mexican favorites at **Los Dos Molinos** (they have locations in Mesa and Springerville, too).

Combine elegant food with great views at **Orange Sky at the Talking Stick Resort** in Scottsdale, or dine with stunning views from North Mountain at **Different Pointe of View** at the Pointe Hilton Tapatio Cliffs Resort in Phoenix.

MARK LYPCZYNSKI



Joe's Farm Grill, Gilbert

JULIE FOSKETT


Schnepf Farms, Queen Creek

CULTURAL REVELRY

Take in a live show as part of your night on the town. Seasonal performances are presented by the **Arizona Opera,** the **Phoenix Symphony, Arizona**







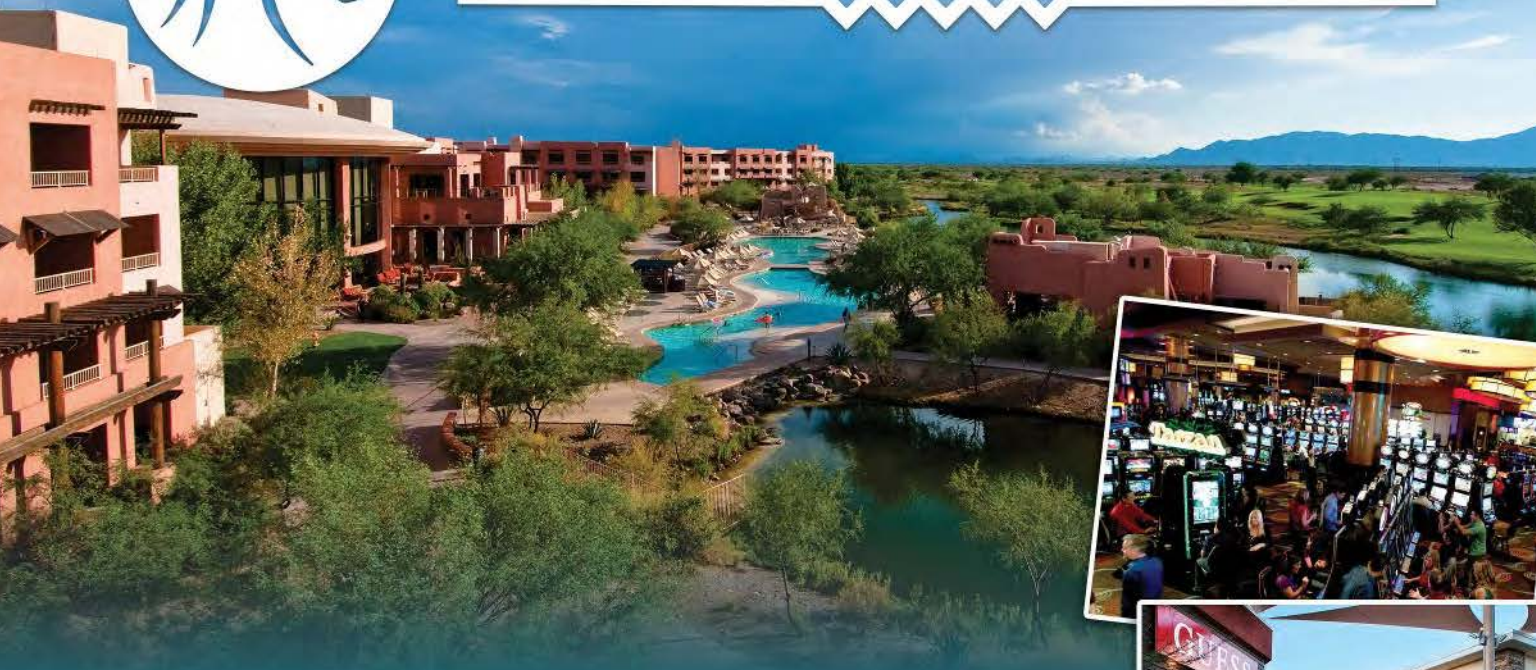






APACHE JUNCTION, AZ
Find your trailhead to events and outdoor adventures!
Surrounded by Legend
1 Superstition Mountain Museum - Open Year Round
2 Lost Dutchmen Marathon - February 18, 2018
3 RVers Paradise & Lost Dutchman State Park
4 Lost Dutchman Days - February 23th - 25th, 2018
5 AZ Renaissance Festival - Weekends February 10th-April 1st, 2018
6 Goldfield Ghost Town - Open Year Round
www.visitaj.com

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ROBERT SILBERBLATT



Arizona Matsuri Festival in downtown Phoenix

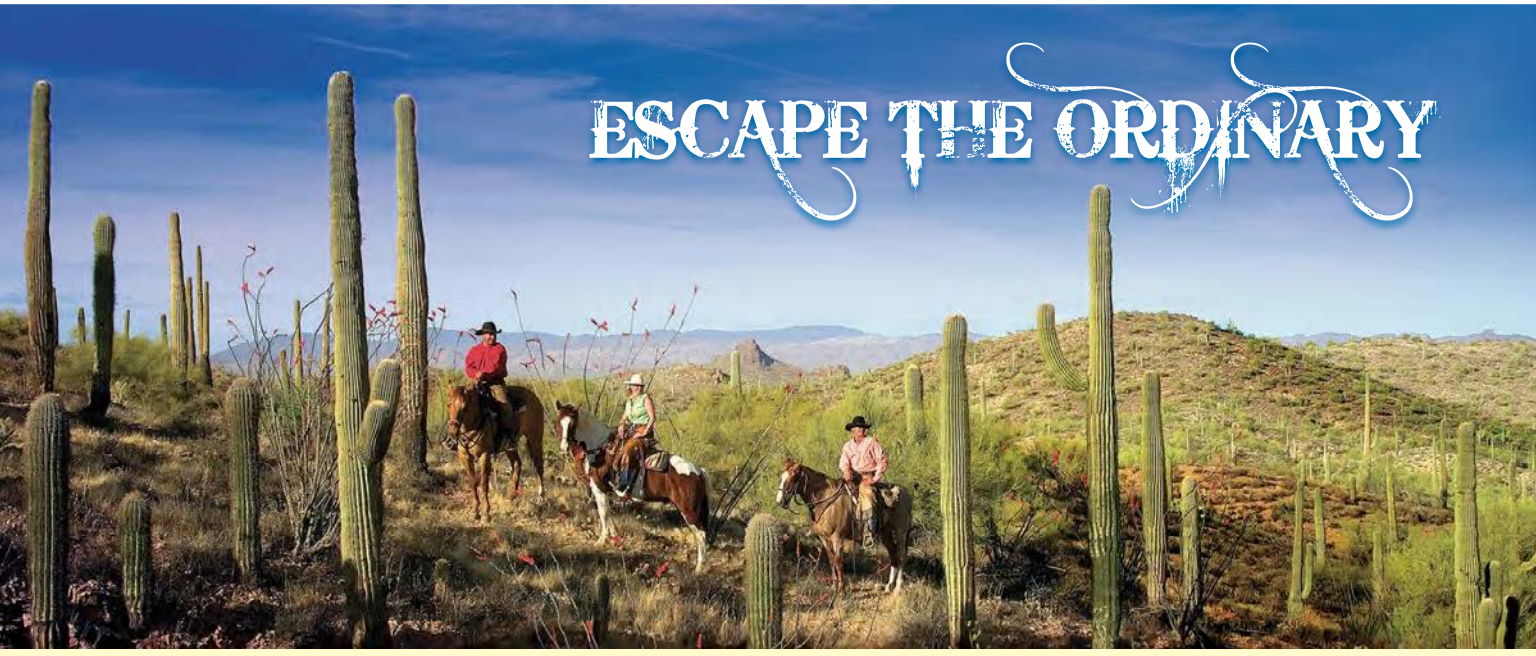
Theatre Company, Ballet Arizona and community troupes and singing groups. Yuck it up at one of several comedy clubs, or try your luck at neighboring casinos run by American Indian tribes.

Turn your love of art into an event. **First Fridays** in Phoenix's Roosevelt Row Arts District showcase local and regional artists and artisans and include exhibition openings and entertainment. Examine fine works from across the world and through the ages at the **Phoenix Art Museum.** The **Shemer Art Center and Museum** in Phoenix showcases the work of longtime and emerging Arizona artists.

ARIZONA OFFICE OF TOURISM



Arizona Museum of Natural History, Mesa

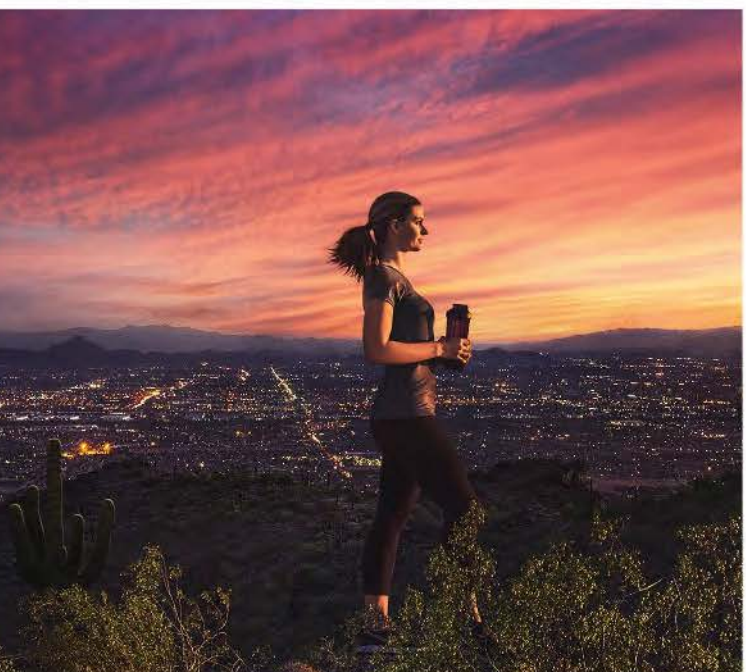


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RANCHO de los CABALLEROS
A Historic Ranch Resort & Golf Club





There's something about sunset atop South Mountain, or the bluesy tunes in a cozy dive bar, or the cactus blooms in a tucked-away garden that encourages wandering spirits to get comfortably lost. So come, and let Phoenix surprise you. Discover more at **VisitPhoenix.com** and **#MYPHX**.

VISITPHOENIX™ .com



Other must-see attractions include **Taliesin West** in Scottsdale, winter home and school of famed architect Frank Lloyd Wright, and the 330-foot fountain that spouts a geyser of water every hour in Fountain Hills.

Feel the culture and heritage of Southwest American Indians. Communities of the Ak-Chin (O'odham), Gila River (Akimel O'odham and Xalychidom Piipaash) and Salt River Pima-Maricopa (Akimel O'odham and Xalychidom Piipaash) present their history and modern-day culture in respective cultural museums.

JULIE FOSKETT



Taliesin West, Scottsdale

COURTESY FIGHTER COMBAT INTERNATIONAL



Fighter Combat International, Mesa

The prehistoric Hohokam culture left hints of village life that you can examine at Phoenix's **Pueblo Grande Museum & Archeological Park,** the largest preserved archaeological site in the city.

The life of early American settlers in Arizona is vividly detailed at the **Pioneer Living History Museum** in Phoenix, while the exhibits at the **Arizona Heritage Center** at Papago Park in Tempe focus on 20th- and 21st-century Arizona.



Learn about the historic and modern Old West at the **Desert Caballeros Western Museum,** a collection of art and artifacts in Wickenburg.

TIME TO UNWIND

With 35 luxury resorts in Greater Phoenix and nearly 200 golf courses in Central Arizona, you'll find lots of chances to slow down and take in the scenery.

Breathe deeply in the open spaces around **Lake Pleasant, Saguaro Lake** and **Canyon Lake,** where you can rent watercraft, fish, swim and watch wildlife.



JILL RICHARDS

iFLY Indoor Skydiving, Scottsdale

Spend some moments of reflection on the peaceful grounds of the **Japanese Friendship Garden** in Phoenix and the gardens of **St. Anthony's Greek Orthodox Monastery** in Florence.

See the city and desert sights in a hot-air balloon ride. Explore desert back roads on a rugged Jeep tour along the **Apache Trail.**



COLLEEN MINIUK-SPERRY

Japanese Friendship Garden, Phoenix

Fulfill your need for speed by driving on racing courses at **Racing Adventures** in Phoenix, **Bondurant** at Wild Horse Pass Motorsports Park and **Octane Raceway** in Scottsdale.

Take to the air. Learn to fly like a fighter or stunt pilot at **Fighter Combat International** in Mesa or ride in a vintage World War II plane at Mesa's **Commemorative Air Force Airbase.** Simulate skydiving at **SkyVenture Arizona** in Eloy or **iFLY Indoor Skydiving** at The Pavilions at Talking Stick in Scottsdale. **AZ**

THE LOCAL WORD

Embark on your own Arizona adventure after reading about everyday experiences around the state—at VisitArizona.com under the Planning tab.

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RESOURCE GUIDE

AMERICAN INDIAN TRIBES

Ak-Chin Indian Community Maricopa
With a name meaning "place where the wash loses itself in the ground," the Ak-Chin Indian Community is nestled into the Santa Cruz Valley, 35 miles south of Phoenix. The community has a variety of enterprises, including Harrah's Ak-Chin Casino, Ak-Chin Southern Dunes Golf Club and the UltraStar Multi-tainment Center at Ak-Chin Circle. When you visit, don't skip the Ak-Chin Him-Dak Eco-Museum and Archives, Historic BIA Agent House and the famous muffins from Vekol Market.
(520) 568-1000, ak-chin.nsn.us

Fort McDowell Yavapai Nation Scottsdale/Fountain Hills
Located in beautiful Scottsdale/Fountain Hills, Fort McDowell is just 20 minutes from Phoenix Sky Harbor International Airport, surrounded by breathtaking 360-degree Sonoran Desert and mountain views. Attractions include Fort McDowell Casino, We-Ko-Pa Resort & Conference Center, We-Ko-Pa Golf Club, Fort McDowell Adventures, Eagle View RV Resort (Asah Gweh Oou-o) and Poco Diablo Resort in Sedona.
(480) 789-5300, wekoparesortandconferencecenter.com

Gila River Indian Community Sacaton
The Huhugam Heritage Center showcases the heritage and culture of the Pima and Maricopa tribes. The Wild Horse Pass Destination includes Sheraton Grand at Wild Horse Pass; Kai, Arizona's only Forbes Five-star/AAA Five-diamond restaurant; Aji Spa; Whirlwind Golf Club, a 36-hole Troon-managed course; Rawhide Western Town and Event Center; Phoenix Premium Outlets; Wild Horse Pass Hotel & Casino; and the Wild Horse Pass Motorsports Park.
(520) 796-5389, wildhorsepass.com

Salt River Pima-Maricopa Indian Community (SRPMIC) Scottsdale
SRPMIC is composed of two tribes: Onk Akimel O'odham (Pima) and Xalychidom Piipaash (Maricopa). Located in the East Valley of Greater Phoenix, the SRPMIC invites you to shop, dine, play and stay at Talking Stick: A Cultural and Entertainment Destination. Featuring amenities such as Talking Stick Resort, Salt River Fields, Talking Stick Golf Club, Butterfly Wonderland, OdySea Aquarium, iFLY, Octane Raceway, TopGolf and the Courtyard Marriott, there is plenty to see and do.
(480) 362-2700, talkingstickarizona.com, srpmic-nsn.gov

COMMUNITY INFORMATION

See page 99 for visitor information centers in Phoenix and Central Arizona.

NATIONAL FORESTS

Tonto National Forest Phoenix
(602) 225-5200, www.fs.usda.gov/tonto

PUBLIC LANDS

For public lands usage information, visit blm.gov/az.
Arizona State Land Department Phoenix
(602) 542-4631, land.az.gov

Casa Grande Ruins National Monument Coolidge
(520) 723-3172, nps.gov/cagr

Maricopa County Parks and Recreation Department Morristown
(602) 506-2930, maricopa.gov/parks

Pinal County Parks and Recreation Casa Grande
(520) 509-3555, pinalcountyaz.gov/visitors

Sonoran Desert National Monument Phoenix
(623) 580-5500, blm.gov/az

STATE PARKS, GAME & FISH

Arizona Game and Fish Department Phoenix
(602) 942-3000, azgfd.gov

Arizona State Parks Phoenix
(602) 542-4174, azstateparks.com

Boyce Thompson Arboretum State Park Superior
(520) 689-2723

Lost Dutchman State Park Apache Junction
(480) 982-4485

McFarland State Historic Park and Florence Visitor Center Florence
(520) 868-5216

Oracle State Park Oracle
(520) 896-2425

Picacho Peak State Park Picacho
(520) 466-3183

Visit VisitArizona.com for additional recreation options.

EXPLORE PHOENIX & CENTRAL ARIZONA

ATTRACTION

Arabian Horse Assoc. of America–Scottsdale Arabian Horse Show Scottsdale WestWorld, 16601 N. Pima Rd., (480) 515-1500, scottsdaleshow.com
2/15–2/25/2018: 2,400 Arabian horses from around the world! Competition, shopping, food, fun events, petting zoo. Kids free!

Arizona Commemorative Air Force Museum Mesa 2017 N. Greenfield Rd., (480) 924-1940, azcaf.org
55,000-sq.-ft. military aviation museum home to seven warbirds, including the rare B17 and B25 Bombers, plus educational exhibits and more.
See ad on page 54.

Arizona Rafting Scottsdale Trips meet at the Salt River near Globe, (800) 231-7238 or (719) 395-2112, saltriverraftingarizona.com
World-class guided whitewater rafting trips in the Salt River Canyon wilderness. Half-, full- and multi-day camping trips.

Arizona's Salt River Tubing & Recreation Mesa 9200 N. Bush Hwy., (480) 984-3305, saltrivertubing.com
Enjoy a Floating Beach Blast Adventure in Tonto National Forest! Tube the rocking Salt River rapids for a unique experience.

Cotton Lane Citrus U-Pick Surprise
14014 N. 172nd Ave., (602) 361-2248 or (623) 556-1024, u-pickcitrusaz.com
Great family fun. Pick fresh citrus right from our trees in Surprise. Hours are 10 a.m.–3 p.m. daily, Dec. 12–March 31.





Desert Caballeros Western Museum Wickenburg 21 N. Frontier St., (928) 684-2272, westernmuseum.org
Experience the Old West, the New West and the Next West with premier art collections, interactive exhibitions and lively tours.

DETOURS Tempe 722 S. Perry Ln., (866) 438-6877 or (480) 633-9013, detoursofthewest.com
Go off the beaten path on a fun, small group tour to Grand Canyon, Tombstone & more in a comfortable, custom touring vehicle.

The Dolly Steamboat Apache Junction 16802 Highway 88, (480) 827-9144, dollysteamboat.com
Nestled in the heart of the Superstition Mountains lies spectacular Canyon Lake, home of the Dolly Steamboat.

Frank Lloyd Wright's Taliesin West Scottsdale 12345 N. Taliesin Dr., (480) 771-6409, franklloydwright.org/azguide
Visit Wright's home, workplace and architectural gem on a guided tour. A National Historic Landmark and Arizona must-see!

Goodyear Ballpark Goodyear 1933 S. Ballpark Way, (623) 882-3120, goodyearbp.com
Spring Training home of the Cleveland Indians and Cincinnati Reds; the facility also hosts a variety of events year-round.
See ad on page 54.

Hall of Flame Fire Museum Phoenix 6101 E. Van Buren St., (602) 275-3473, hallofflame.org
The Hall has almost a hundred restored pieces of classic fire apparatus in 35,000 square feet of exhibits.
See ad on page 54.

Hot Air Expeditions Phoenix 702 W. Deer Valley Rd., (800) 831-7610 or (480) 502-6999, hotairexpeditions.com
Enjoy the Sonoran Desert from 5,000 feet! Balloon flights depart daily, year-round. Best Ballooning in Phoenix—Fodor's Travel.
See ad on page 52.

The Phoenix Zoo Phoenix 455 N. Galvin Pkwy., (602) 286-3800, phoenixzoo.org
Enter a world of wonder at the Phoenix Zoo. Featuring more than 3,000 animals, including many threatened or endangered species.
See ad on page 48.

Pueblo Grande Museum and Archaeological Park Phoenix 4619 E. Washington St., (877) 706-4408 or (602) 495-0901, pueblogrande.com
Explore the ancient heart of Phoenix at a prehistoric archaeological site. Enjoy exhibits and a store with American Indian arts.

Queen Creek Olive Mill Queen Creek 25062 S. Meridian Rd., (480) 888-9290, queencreekolivemill.com
Tour, shop, eat, repeat at Arizona's only family-owned olive farm and mill. Tours daily.

Rawhide Western Town & Event Center Chandler 5700 W. Loop Rd., (480) 502-5600, rawhide.com
Arizona's 1880s Western town for banquets, holiday and private events. Event center for concerts, sports, festivals and expos.
See ad on page 46.

Superstition Mountain Lost Dutchman Museum Apache Junction 4087 N. Apache Trail, (480) 983-4888, superstitionmountainmuseum.org
The history and mystery of the Dutchman Jacob Waltz and his lost mine, plus much more to see and do on the 15-acre site.

Tempe Boat Rentals Tempe 72 W. Rio Salado Pkwy., (480) 303-9803, boats4rent.com
Family-owned and -operated, Tempe Boat Rentals offers kayaks, pedal boats, stand-up paddleboards and electric boats for rent.

Town of Carefree Carefree 101 Easy St., (480) 488-3686, visitcarefree.com
Carefree Desert Gardens is a self-guided, four-acre tour featuring fascinating and rare desert species. Free and open daily.

University of Phoenix Stadium Glendale 1 Cardinals Dr., (623) 433-7100, universityofphoenixstadium.com
Hosts NFL games and other sporting and entertainment events. Public tours available Wednesday–Saturday.

Wildlife World Zoo, Aquarium & Safari Park Litchfield Park 16501 W. Northern Ave., (623) 935-9453, wildlifeworld.com

SYMBOL KEY

Electric vehicle charging station on-site
Pets allowed



Wildlife World Zoo, Aquarium & Safari Park has Arizona's largest display of exotic animals—6,000 animals of 600 species.

BED AND BREAKFAST

Bespoke Inn Scottsdale Scottsdale 3701 N. Marshall Way, (855) 396-6196 or (480) 664-0730, bespokeinn.com
In Downtown Scottsdale, a luxury boutique inn featuring award-winning restaurant, custom decor and heated infinity lap pool.

DESTINATION INFORMATION

Apache Junction Apache Junction 300 E. Superstition Blvd., visitaj.com
Home of the Superstition Mountains and the Lost Dutchman's Gold Mine. Be surrounded by legends!
See ad on page 42.

Discover Gilbert Gilbert 90 E. Civic Center Dr., (480) 503-6913, discovergilbert.com
Gilbert, in the metro Phoenix East Valley, boasts a farm-connected local food scene, family fun and pet-friendly attractions.

Experience Scottsdale Scottsdale 4343 N. Scottsdale Rd., Ste. 170, (800) 782-1117 or (480) 421-1004, experiencescottsdale.com
Experience Scottsdale works with its members and community to develop Scottsdale as a premier travel destination.
See ad on page 40.

Greater Casa Grande Chamber of Commerce Casa Grande 575 N. Marshall St., (800) 916-1515 or (520) 836-2125, casagrandechamber.org
Discover rural AZ charm minutes from Phoenix/Tucson. Historic downtown, unique events, activities, golf, dining and so much more!

Superior Chamber of Commerce Superior 165 Main St., (520) 689-0200, superiorarizonachamber.org
Surrounded by the Tonto National Forest, Superior is where tradition, adventure and history meet for a unique experience.
See ad on page 58.

Surprise Recreation Campus Surprise 15960 N. Bullard Ave., (623) 222-2000, surpriseaz.gov
The Surprise Recreation Campus is the award-winning spring training home of the Kansas City Royals and Texas Rangers.

Talking Stick Entertainment District Scottsdale 9120 E. Talking Stick Way, Ste. E10, (888) 979-5010 or (480) 362-6636, VisitTalkingStick.com
Walk among butterflies, swim with dolphins, race electric karts, soak up spring training and so much more! Come play with us.
See ad on page 56.

Town of Carefree Carefree 8 Sundial Circle, (480) 488-3686, visitcarefree.com
Carefree Desert Gardens showcase rare desert plants, fine art, wine festivals and the famous Carefree Sundial. Open daily. Free.

Town of Fountain Hills Fountain Hills 16705 E. Avenue of the Fountains, (480) 816-5100, experiencefountainhills.org
We could tell you about our mountain views, world-class biking or off-road adventures, but come see for yourself!

Visit Glendale Glendale 5800 W. Glenn Dr., Ste. 140, (877) (800) 2601 or (623) 930-4500, visitglendale.com
Glendale features exciting sports action in the nation's finest multi-sport complex, festivals and famous shopping districts.
See ad on page 41.

Visit Mesa Mesa 120 N. Center St., (800) 283-6372 or (480) 682-3666, visitmesa.com
Shopping, golf, events and attractions abound in Mesa. Stop by the visitor's center or call for a free Official Visitors Guide.
See ad on page 47.

Visit Phoenix Phoenix 125 N. 2nd St., Ste. 120, (877) 225-5749 or (602) 254-6500, visitphoenix.com
Learn more about things to do, places to stay and where to eat in Greater Phoenix.
See ad on page 45.

Western Spirit: Scottsdale's Museum of the West Scottsdale 3830 N. Marshall Way, (480) 686-9539, scottsdalemuseumwest.org
Discover the West's history and rich cultural heritage at this highly rated TripAdvisor attraction and Smithsonian Affiliate.
See ad on page 52.

Wild Horse Pass Chandler 5350 N. 48th St., Ste. 210, (520) 796-5389, wildhorsepass.com
Hotel and casino, Sheraton resort, spa, Whirlwind Golf Club, outlets, Rawhide, motorsports park, Bondurant and fine dining.
See ad on page 43.



THE PHOENICIAN
SCOTTSDALE
THE
LUXURY
COLLECTION

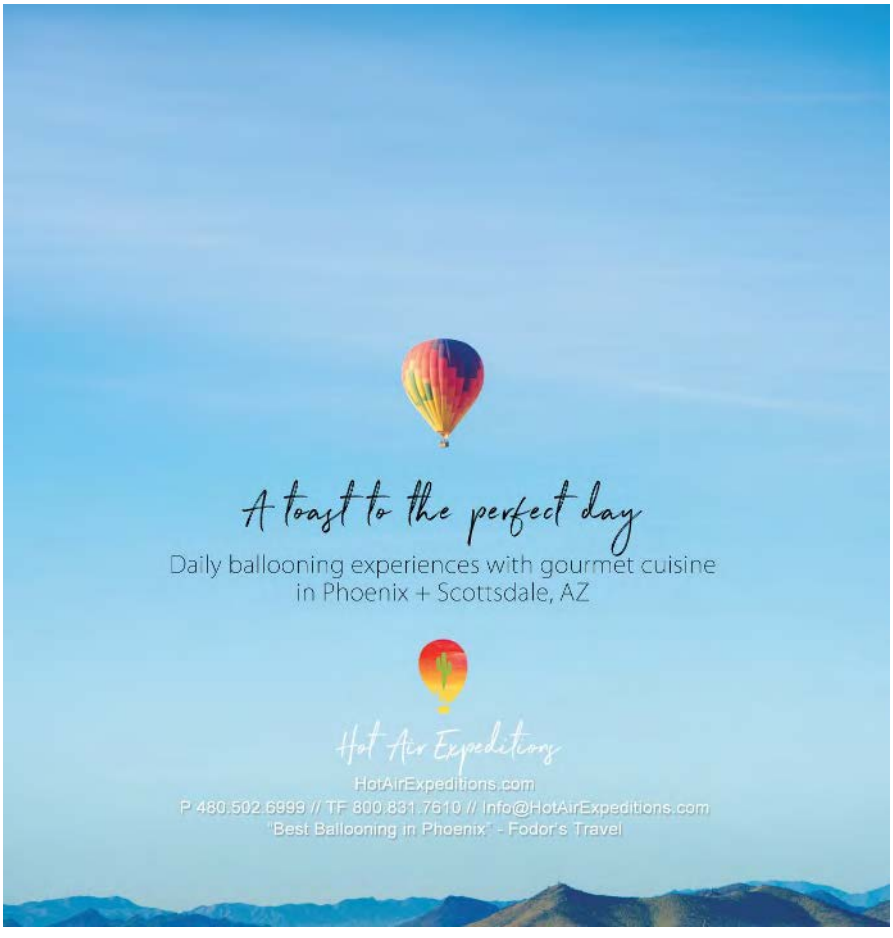
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Welcome to the next chapter of The Phoenician's storied legacy, where your stay is celebrated in a contemporary style thoughtfully written for today's luxury traveler. Be among the first to experience this AAA Five Diamond transformation, and discover everything you never knew you always wanted.

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Postcard (L-R): Fannie Nampeyo (Hopi, 1900-1987) and Nampeyo (Hopi/Tewa, c. 1860-1942). Ceramics (L-R): Rainy Naha (Hopi/Tewa, b. 1949), *Jar,* 2008; Nampeyo (Hopi/Tewa, c. 1860-1942), *Polychrome Storage Jar with Appliqué,* c. 1905; Nampeyo and Annie Healing Nampeyo (1884-1968), *Bi-lobal Jar,* 1900-1905. Foreground: Nathan Begaye (Hopi/Navajo, 1958-2010), *Polychrome Water Canteen,* 2000. Gifts of The Allan and Judith Cooke Collection. Photo by Bill Dambrova.

Bottom photo: *The Abe Hays Family Spirit of the West Collection.* Photo by Jennifer Conway.

SYMBOL KEY

Electric vehicle charging station on-site
Pets allowed

DINING

Artizen Crafted American Kitchen & Bar Phoenix 2401 E. Camelback Rd., (602) 522-6655, artizenaz.com
SOUTHWESTERN/REGIONAL
Artizen serves crafted American cuisine sourced from the area's finest local producers and seasonal regional ingredients.

Cholla Prime Steakhouse & Lounge Scottsdale 524 N. 92nd St., (480) 850-7777, casinoarizona.com ***STEAKHOUSE***
Cholla Prime Steakhouse & Lounge offers one of Scottsdale's best fine-dining experiences in an intimate, upscale setting.

Compass Arizona Grill Phoenix 122 N. 2nd St., (888) 233-1234 or (602) 440-3166, phoenix.regency.hyatt.com ***AMERICAN***
Arizona's revolving rooftop lounge and restaurant offers seasonal menus with 360-degree views of the Valley. Open daily 5 p.m.

DC Steakhouse Chandler 98 S. San Marcos, (480) 899-4400, dc-steakhouse.com ***STEAKHOUSE***
Steak and chop house with seafood, a full bar and wine list.

Different Pointe of View Phoenix 11111 N. 7th St., (602) 866-6350, differentpointeofview.com
AMERICAN
Different Pointe of View offers cutting-edge American cuisine coupled with a distinctive Mediterranean influence and great views.

Elements at Sanctuary Camelback Mountain Resort Scottsdale 5700 E. McDonald Dr., (888) 452-9369 or (480) 948-2300, sanctuaryaz.com ***AMERICAN***
Savor farm-fresh American cuisine by Food Network star Chef Beau MacMillan. Spectacular views from elements dining deck.

Kai Chandler 5594 W. Wild Horse Pass Blvd., (602) 225-0100, wildhorsepassresort.com/kai
CONTEMPORARY AMERICAN INDIAN
AAA Five-diamond/Forbes Five-star Kai is renowned for incorporating the essence of the Pima and Maricopa tribes into the menu.
See ad on page 55.

Lincoln at JW Marriott Camelback Inn Scottsdale 5402 E. Lincoln Dr., (800) 242-2635 or (480) 905-7979, lincolnrestaurantaz.com
AMERICAN
Enjoy locally sourced, modern American cuisine, while taking in the breathtaking views of Camelback Mountain.

Litchfield's Litchfield Park 300 E. Wigwam Blvd., (623) 856-1053, wigwamarizona.com
CONTEMPORARY AMERICAN
This signature restaurant supports the local community with a menu crafted from farm-to-table and locally sourced produce.

LON's at the Hermosa Paradise Valley 5532 N. Palo Cristi Rd., (602) 955-7878, lons.com
AMERICAN
Enjoy globally inspired Arizona fare on an award-winning patio with a cascading fountain and views of Camelback Mountain.

Marston's Cafe Phoenix 100 N. 1st St., (602) 333-0000, renaissancephoenix downtown.com ***AMERICAN***
Enjoy a celebration of indigenous food offerings, a wide variety of regional specialties and all-American favorites.

Mowry & Cotton Scottsdale 6000 E. Camelback Rd., (800) 888-8234 or (480) 423-2530, mowryandcotton.com/ ***AMERICAN***
Reunite with friends over cocktails and dinner at this lively locale, featuring regionally inspired Modern American cuisine.

Orange Sky Restaurant Scottsdale 9800 E. Talking Stick Way, (866) 877-9897 or (480) 850-8606, talkingstickresort.com ***STEAKHOUSE***
Dine in style at Scottsdale's culinary jewel atop Talking Stick Resort and enjoy world-class entrées and breathtaking views.

Province Urban Kitchen & Bar Phoenix 333 N. Central Ave., (602) 429-3600, provincephx.com ***AMERICAN***
Province Urban Kitchen & Bar is a modern American restaurant featuring traditional dishes and seasonally fresh ingredients.

Red's Bar & Grill Litchfield Park 451 N. Old Litchfield Rd., (623) 856-1094, wigwamarizona.com ***AMERICAN***
Soul-warming cuisine with a relaxed vibe. Home to 14 TVs and an expansive scenic outdoor patio overlooking two golf courses.

Salt River Tavern Phoenix 10 E. Thomas Rd., (602) 222-1111, ***AMERICAN***
This American tavern specializes in comfort food, craft beers and simple cocktails boasting local flair when possible.

T. Cook's Phoenix 5200 E. Camelback Rd., (800) 672-6011 or (602) 840-3610, tcooksphoenix.com ***MEDITERRANEAN***
Mediterranean-inspired cuisine with the philosophy of magnifying the purity of local, fresh and seasonal ingredients.

Top of the Rock Tempe 2000 W. Westcourt Way, (602) 431-2370, marriott.com/PHXTM ***SOUTHWESTERN/REGIONAL***
Beautiful views, signature cocktails, locally sourced chef-inspired cuisine. A local favorite and a must-see for visitors.

SHOPPING

Biltmore Fashion Park Phoenix 2502 E. Camelback Rd., (602) 955-8400, shopbiltmore.com
Outdoor mall in park-like setting with high-end retailers, including Saks Fifth Avenue, Macy's, Sephora and Ralph Lauren.

Chandler Fashion Center Chandler 3111 W. Chandler Blvd., (480) 786-9307, shopchandlerfashioncenter.com
Southeast Valley's premier shopping destination with Nordstrom, Macy's, Apple, LEGO, lululemon athletica and Michael Kors.

Kierland Commons Scottsdale 15205 N. Kierland Blvd., (480) 348-1577, kierlandcommons.com
Outdoor center that blends stores like Anthropologie and J.Crew with restaurants like Zinc Bistro and Mastro's Ocean Club.

Scottsdale Fashion Square Scottsdale 7014 E. Camelback Rd., (480) 941-2140, fashionsquare.com
Arizona's premier shopping destination, which offers 240 top brands like Neiman Marcus, Nordstrom, Louis Vuitton and ZARA.

Sibley's West: The Chandler and Arizona Gift Shop Chandler 72 S. San Marcos Place, (480) 899-4480, sibleyswest.com
Sibley's West in downtown Chandler boasts a wide variety of unique gift items and souvenirs from more than 200 Arizona suppliers.

SPA

Aji Spa Chandler 5594 W. Wild Horse Pass Blvd., (602) 385-5759, wildhorsepassresort.com/spa
A 17,500-sq.-ft. spa featuring 17 treatment rooms, a salon, fitness center and relaxing watsu pool.
See ad on page 55.

Alvadora Spa Phoenix 5200 E. Camelback Rd., (800) 672-6011 or (602) 977-6400, alvadora.com
Tucked inside the Royal Palms Resort, experience the rejuvenating, nurturing essence of the Mediterranean.

Narande Spa Tempe 2000 W. Westcourt Way, (602) 431-2357, marriott.com/PHXTM
Indulge in an intimate spa retreat offering monthly specials, a variety of services, and access to resort fitness center and pools.



SYMBOL KEY

Electric vehicle charging station on-site

Pets allowed

The Phoenician Spa Scottsdale 6000 E. Camelback Rd., (800) 888-8234 or (480) 941-8200, thephoenician.com
Rejuvenate and unwind in this brand-new three-story facility, featuring a rooftop pool, Drybar and signature spa treatments.
See ad on page 51.

The Red Door Salon & Spa Litchfield Park 195 Old Litchfield Rd., (623) 535-4967, wigwamarizona.com
The Red Door Salon & Spa is a 26,000-square-foot soothing sanctuary with a private pool for spa guests.

Revive Spa at JW Marriott Desert Ridge Resort Phoenix 5350 E. Marriott Dr., (866) 738-4834 or (480) 293-3700, jwrevivespa.com
Resort spa and salon offering massage, facials, body treatments, nails and hair, as well as a full range of luxurious amenities.

Sanctuary Camelback Mountain Resort & Spa Scottsdale 5700 E. McDonald Dr., (888) 452-9369 or (480) 948-2100, sanctuaryaz.com
Recently remodeled, Sanctuary Spa is an intimate retreat offering Asian-inspired treatments in 12 indoor/outdoor rooms.

Spa Avania Scottsdale 7500 E. Doubletree Ranch Rd., (480) 483-5558, spaavania.com
Spa Avania offers treatments synchronized to the science of time and the body's natural daily rhythms and requirements.

The Spa at Camelback Inn Scottsdale 5402 E. Lincoln Dr., (800) 922-2635 or (480) 596-7040, camelbackspa.com
Set amid the Sonoran Desert, this award-winning spa is located at the legendary JW Marriott Camelback Inn.

The Spa at Talking Stick Scottsdale 9800 E. Talking Stick Way, (866) 877-9897 or (480) 850-4606, talkingstickresort.com
The Spa at Talking Stick, high on the 14th floor of Talking Stick Resort, offers unique American Indian-inspired treatments.
See ad on page 50.

Tocaloma Spa & Salon Phoenix 11111 N. 7th St., (602) 375-4645, tocalomaspa.com
Our peaceful and intimate spa provides a variety of massage, body and skincare treatments, as well as nail, haircare and cosmetic services.

Tocasierra Spa, Salon & Fitness Centre Phoenix 7677 N. 16th St., (800) 445-8667 or (602) 906-3820, tocasierraspa.com
Indulge in a variety of beauty treatments, spa services and therapies. Re-energize with state-of-the-art exercise equipment.

Well & Being Spa at Fairmont Scottsdale Princess Scottsdale 7575 E. Princess Dr., (800) 344-4758 or (480) 585-2732, scottsdaleprincess.com
An innovative fusion of spa and wellness, Well & Being offers a personalized palette of spa treatments, fitness and nutrition.







TOUR OPERATOR

Across Arizona Tours Phoenix 3213 E. Rosemonte Dr., (602) 533-1813 or (602) 233-1813, acrossarizonatours.com
We conduct tours throughout Arizona to Grand Canyon, Sedona and more. Custom tours available for any size group. Open 24/7.

Adventures Out West Sedona 441 Forest Rd., (800) 755-0935 or , azsegway.com
Sonoran Desert Off-Road Segway and Sedona Red Rock Country Segway Tours. Awesome local guides. Touring Arizona since 1995.

Arizona Outback Adventures Scottsdale 16447 N. 91st St., Ste. 101, (866) 455-1601 or (480) 945-2881, aoa-adventures.com
Get out and adventure! Guided hiking, biking and river trips across Arizona and high-performance bike rentals in Scottsdale.

Arizona Scenic Tours Phoenix 13768 W. Earll Drive, (800) 724-1251 or (480) 459-7144, ArizonaScenicTours.com
Custom guided tours throughout the Southwest. Top-rated experiences for all. Sedona, Grand Canyon, Apache Trail and more!

DETOURS Tempe 722 S. Perry Ln., (866) 438-6877 or (480) 633-9013, detoursofthewest.com
Go off the beaten path on a fun, small group tour to Grand Canyon, Tombstone and more in a comfortable, custom touring vehicle.

Stellar Adventures Scottsdale PO Box 8329, (602) 402-0584, stellaradventures.com
Tame the rugged desert on an H1 Hummer, M1009 Blazer or ATV/UTV Tour. Firearms training and stargazing/NV tours available.

TRANSPORTATION

Phoenix-Mesa Gateway Airport Mesa 6033 S. Sossaman Road, (480) 988-7600, gatewayairport.com
Gateway Airport makes travel just "plane" easy with nonstop service to more than 45 destinations on Allegiant and WestJet.
See ad on page 49.

Accommodations

= AZLTA-Certified Green Lodging (see page 102)
= Electric vehicle charging station on-site
$ = $75 or less • $$ = $76–$150 • $$$ = $151–$250 • $$$$ = $251 or more

	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
GUEST RANCH																		
Rancho de los Caballeros, Phoenix (800) 684-5030 • (928) 684-5484 • ranchodeloscaballeros.com • *see ad on page 44*	79			•	•	•	•	•	•	•	•	•	•	•		•		$$$–$$$$
HOTEL																		
Aloft–Phoenix Airport, Phoenix (602) 275-6300 • aloftphoenixairport.com	143	•				•		•	•	•		•			•	•	•	$$–$$$$
The Camby, Phoenix (602) 522-6607 • thecamby.com	277			•	•	•	•	•	•	•		•			•	•	•	$$$–$$$$



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Find yourself a world away at Sheraton Grand at Wild Horse Pass. Arizona's premier Native American owned luxury resort. Discover our AAA Five-Diamond dining at Kai, unwind at Aji Spa with a private pool and café or hit the links at Whirlwind Golf Club.

Enjoy our best available rates at wildhorsepassresort.com or call 866 716 8134.

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Choice Hotels, Region-wide (888) 846-9378 • choicehotels.com/arizona# • *see ad on page 1*			•					•	•	•		•			•	•	•	$–$$$$
Courtyard Phoenix West-Avondale, Region-wide (623) 271-7660 • marriott.com/phxsw	127				•	•		•	•	•	•	•			•	•	•	$$–$$$$
Crowne Plaza Phoenix Airport, Phoenix (855) 586-8475 • (602) 273-7778 • crowneplazaphx.com	292	•		•	•	•	•	•	•	•		•				•	•	$$–$$$
DoubleTree by Hilton Phoenix–Tempe, Tempe (800) 774-1500 • (480) 967-1441 • phoenixtempe.doubletree.com	270	•		•	•	•	•	•		•		•			•	•	•	$$–$$$$
Embassy Suites by Hilton Phoenix Airport, Phoenix (800) 362-2779 • (602) 957-1910 • phoenixairport.embassysuites.com	182	•	•	•	•	•		•	•	•		•			•	•	•	$$–$$$$
Embassy Suites by Hilton Phoenix Downtown North, Phoenix (602) 222-1111 • phoenixsuites.hilton.com	242		•	•	•	•	•	•	•	•		•			•	•	•	$$–$$$$
Four Points by Sheraton Phoenix North, Phoenix (602) 943-2341	248			•	•	•		•	•	•		•			•	•	•	$$–$$$$
Gainey Suites Hotel, Scottsdale (800) 970-4666 • (480) 922-6969 • gaineysuiteshotel.com	162		•	•		•	•	•	•	•	•	•			•	•	•	$$–$$$$
Hampton Inn Phoenix Midtown, Phoenix (800) 426-7866 • (602) 200-0990 • hampton-inn.com/hi/phoenix-midtown	99		•					•	•	•		•		•		•	•	$$–$$$$
Hilton Garden Inn Phoenix Midtown, Phoenix (602) 279-9811 • phoenixmidtown.hgi.com	156			•	•	•		•	•	•		•				•		$$–$$$$
Hilton Phoenix/Mesa, Mesa (480) 833-5555 • phoenixmesa.hilton.com	260			•	•	•		•	•	•		•			•	•	•	$$–$$$$
Holiday Inn & Suites Phoenix Airport North, Phoenix (800) 465-4329 • (602) 244-8800 • hiphoenixsuites.com	228	•		•	•	•		•	•	•		•			•	•	•	$$–$$$$
Hotel Tempe InnSuites, Tempe (800) 842-4242 • (480) 897-7900	160	•	•	•		•		•	•	•		•		•	•	•	•	$–$$$



Accommodations

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	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
Hyatt Regency Phoenix, Phoenix (887) 233-1234 • (602) 252-1234 • phoenix.regency.hyatt.com	693			•	•	•	•	•	•	•		•				•	•	$$–$$$$
Inn at Eagle Mountain, Fountain Hills/Scottsdale (866) 966-4153 • innateaglemountain.com	38			•	•	•	•	•		•	•		•		•	•	•	$–$$$$
Lexington Hotel & Suites, Fountain Hills (877) 539-7070 • (480) 837-6565 • redlion.com/fountain-hills	102			•	•	•		•	•	•		•				•	•	$–$$$
The McCormick Scottsdale, Scottsdale (800) 243-1332 • (480) 948-5050 • millenniumhotels.com/en/scottsdale/the-mccormick-scottsdale	125			•	•	•	•	•	•	•		•	•	•	•	•	•	$$–$$$$
Phoenix Marriott Mesa, Mesa (480) 898-8300 • marriott.com/hotels/travel/phxmm-phoenix-marriott-mesa	274			•	•	•	•	•	•	•		•				•	•	$$–$$$
Radisson Hotel Phoenix Airport, Phoenix (800) 333-3333 • (602) 220-4400 • radisson.com/phoenixaz_airport	204	•		•	•	•	•	•	•	•		•			•	•	•	$$–$$$$
Renaissance Phoenix Downtown Hotel, Phoenix (602) 333-0000 • renaissancephoenixdowntown.com	518			•	•	•	•	•		•		•				•	•	$$–$$$$
Sheraton Crescent Hotel, Phoenix (800) 325-3535 • (602) 943-8200 • sheratoncrescent.com	342			•	•	•	•	•	•	•		•			•	•	•	$–$$$$
Sheraton Desert Oasis, Scottsdale (866) 207-8599 • (480) 515-5888 • sheraton.com/desertoasis	300			•	•		•	•	•	•		•		•		•	•	$$–$$$$
Sheraton Grand Phoenix, Phoenix (866) 716-8134 • (602) 262-2500 • sheratongrandphoenix.com	1,000			•	•	•	•	•	•	•		•			•	•		$$–$$$$
Westin Kierland VIIlas, Scottsdale (866) 624-1700 • (480) 624-1700 • westin.com/kierlandvillas	298			•	•		•	•	•	•		•	•	•		•	•	$$–$$$$
The Westin Phoenix Downtown, Phoenix (800) 937-8461 • (602) 429-3500 • westinphoenixdowntown.com	242			•	•	•	•	•	•	•		•			•	•	•	$$–$$$$



ESCAPE THE EVERYDAY

Treat your mind, body and spirit.

The Westin Kierland is your escape from the everyday. Nestled in the shadows of the McDowell Mountains, Arizona's natural beauty is always in full view whether you're playing our top-ranked golf course or lounging poolside. Spend the day shopping at nearby Kierland Commons before re-energizing at Agave, The Arizona Spa or the WestinWORKOUT fitness center. Then spend your evenings enjoying dinner and drinks as the sun sets in the desert sky. When you need to get away, the Westin Kierland is your oasis.

For more information or to make a reservation, visit kierlandresort.com

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Accommodations

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RESORT	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
Andaz Scottsdale Resort & Spa, Scottsdale (800) 233-1234 • (480) 368-1234	201			•	•	•	•	•	•	•	•	•			•	•	•	$$–$$$$
CopperWynd Resort and Club, Scottsdale (877) 707-7760 • (480) 333-1900 • copperwynd.com • *see ad on this page*	32				•	•	•	•	•	•	•	•	•	•		•	•	$$–$$$$
Crowne Plaza San Marcos Golf Resort, Chandler (800) 972-3574 • (480) 812-0900 • sanmarcosresort.com	249			•	•	•	•	•	•	•		•	•	•	•	•	•	$$–$$$
DoubleTree Resort by Hilton Paradise Valley/Scottsdale, Scottsdale (800) 222-8733 • (480) 947-5400 • paradisevalley.doubletree.com	378			•	•	•	•	•	•	•		•		•	•	•	•	$$$–$$$$
Embassy Suites by Hilton Scottsdale Resort, Scottsdale (800) 362-2779 • (480) 949-1414 • scottsdale.embassysuites.com	312		•	•	•	•		•	•	•		•		•		•	•	$$–$$$$
Fairmont Scottsdale Princess, Scottsdale (800) 344-4758 • (480) 585-4848 • scottsdaleprincess.com	750			•	•	•	•	•	•	•	•	•	•	•	•	•	•	$$$–$$$$
The Hermosa Inn & LON's, Paradise Valley (602) 792-1851	43			•	•	•	•	•		•		•			•	•	•	$$–$$$$
Hilton Scottsdale Resort & Villas, Scottsdale (800) 222-8733 • (480) 948-7750 • scottsdaleresort.hilton.com	235		•	•	•	•	•	•	•	•		•			•	•	•	$$$–$$$$
Holiday Inn Club Vacations Scottsdale Resort, Scottsdale (866) 206-1402 • (480) 248-9001 • holidayinnclubvacations.com/scottsdale • *see ad on page 48*	213				•	•	•	•	•	•		•				•	•	$$–$$$$
Hyatt Regency Scottsdale Resort & Spa, Scottsdale (800) 55H-YATT • (480) 444-1234 • scottsdale.regency.hyatt.com	493			•	•	•	•	•	•	•	•	•	•	•	•	•	•	$$–$$$$
JW Marriott Camelback Inn Resort & Spa, Scottsdale (800) 242-2635 • (480) 948-1700 • camelbackinn.com	453			•	•	•	•	•	•	•	•	•	•	•	•	•	•	$$$–$$$$
JW Marriott Desert Ridge Resort & Spa, Phoenix (800) 835-6206 • (480) 293-5000 • jwdesertridgeresort.com	950			•	•	•	•	•	•	•	•	•	•	•		•	•	$$$–$$$$







Accommodations

= AZLTA-Certified Green Lodging (see page 102)
= Electric vehicle charging station on-site
$ = $75 or less • $$ = $76–$150 • $$$ = $151–$250 • $$$$ = $251 or more

	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
The Phoenician, Scottsdale (800) 888-8234 • (480) 941-8200 • thephoenician.com • *see ad on page 51*	645			•	•	•	•	•	•	•	•	•	•	•	•	•		$$$–$$$$
Phoenix Marriott Tempe at The Buttes Resort & Spa, Tempe (888) 867-7492 • (602) 225-9000 • marriott.com/PHXTM	354			•	•	•	•	•		•	•	•		•		•	•	$$–$$$$
Pointe Hilton Squaw Peak Resort, Phoenix (800) 445-8667 • (602) 997-2626 • squawpeakhilton.com	563			•	•	•	•	•	•	•	•	•		•	•	•	•	$$–$$$$
Pointe Hilton Tapatio Cliffs Resort, Phoenix (800) 445-8667 • (602) 866-7500 • tapatiocliffshilton.com	584			•	•	•	•	•	•	•	•	•	•	•		•	•	$$–$$$$
Royal Palms Resort and Spa, Phoenix (800) 672-6011 • (602) 283-1234 • royalpalmshotel.com	119			•	•	•	•	•	•	•	•	•			•	•	•	$$$–$$$$
Sanctuary Camelback Mountain Resort & Spa, Paradise Valley (888) 452-9369 • (480) 948-2100 • sanctuaryaz.com	109			•	•	•	•	•	•	•	•	•		•	•	•		$$$$
Sheraton Grand at Wild Horse Pass, Chandler (602) 225-0100 • wildhorsepassresort.com • *see ad on page 55*	500			•	•	•	•	•	•	•	•	•	•	•	•	•	•	$$–$$$$
Talking Stick Resort, Scottsdale (866) 877-9897 • (480) 850-7777 • talkingstickresort.com	496			•	•	•	•	•	•	•	•	•	•			•	•	$$–$$$$
The Westin Kierland Resort & Spa, Phoenix/Scottsdale (800) 354-5892 • (480) 624-1000 • kierlandresort.com • *see ad on page 57*	732			•	•	•	•	•	•	•	•	•	•	•	•	•		$$–$$$$
The Wigwam, Litchfield Park (800) 327-0396 • (623) 935-3811 • wigwamarizona.com	331			•	•	•	•	•	•	•	•	•	•	•	•	•		$$–$$$$

RV Parks

	NUMBER OF SPACES	PARK MODELS FOR RENT	SENIOR ADULT PARK	PETS ALLOWED	LAUNDRY	SWIMMING POOL	ORGANIZED ACTIVITIES	INTERNET ACCESS	GOLF ON-SITE	TENNIS ON-SITE	RESTAURANT	EXERCISE FACILITIES	HOT TUB/JACUZZI	RECREATIONAL FACILITIES	ADA COMPLIANT
AZ Association of RV Parks & Campgrounds, Phoenix arizonaarvc@aol.com • gocampinginarizona.com	1,000	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Eagle View RV Resort, Fort McDowell (480) 789-5310 • eagleviewrvresort.com	150			•	•	•		•	•		•	•	•		
Phoenix Metro RV Park, Phoenix (623) 582-0390 • phoenixmetrorvpark.com	310		•	•	•	•	•	•				•	•	•	•

Golf

PB = PUBLIC • SP = SEMI-PRIVATE

	NUMBER OF HOLES	PAR	YARDAGE	RATING	SLOPE	PUBLIC/ SEMI-PRIVATE	DRESS CODE	ADVANCED BOOKING POLICY	GOLF SHOP	BAR/LOUNGE	RESTAURANT
Bear Creek Golf Complex–Bear Course, Chandler (480) 883-8200 • bearcreekaz.com	18	71	6825	71.6	122	PB	•	•	•	•	•
Bear Creek Golf Complex–Cub Course, Chandler (480) 883-8200 • bearcreekaz.com	18	59	3501	57.3	83	PB	•	•	•	•	•
Camelback Golf Club, Scottsdale (800) 242-2635 • (480) 596-7050 • camelbackgolf.com	36	72	6903	70.2	124	SP	•	•	•	•	•
Lone Tree Golf Club, Chandler (480) 219-0831 • lonetreegolf18.com	18	71	7001	72.2	129	PB	•	•	•	•	•
Lookout Mountain Golf Club, Phoenix (602) 866-6356 • pointegolf.com	18	72	6515	70	130	PB		•	•	•	•
Los Caballeros Golf Club, Wickenburg (928) 684-2704 • loscaballerosgolf.com	18	72	7020	73.1	137	SP	•	•	•	•	•
McCormick Ranch Golf Club, Scottsdale (480) 998-3800	36	72	7044	73.2	132	PB	•	•	•	•	•
The Phoenician, Scottsdale (800) 888-8234 • (480) 423-2449 • thephoenician.com/golf • *see ad on page 51*	18	71	6501			PB	•	•	•	•	•
San Marcos Golf Course, Chandler (480) 963-3358 • sanmarcosgolfresort.com	18	72	6640	71	124	PB	•	•	•	•	•
The Wigwam Golf Club, Litchfield Park (800) 909-4224 • (623) 935-9414 • wigwamgolf.com	54	72	7400	73.1	132	SP	•	•	•	•	•
Wildfire Golf Club, Phoenix (888) 705-7775 • (480) 293-3800 • wildfiregolf.com	36	72	7145	72.5	140	SP	•	•	•	•	•

TUCSON
& SOUTHERN ARIZONA

CULTURES CONVERGE IN THIS INTERNATIONAL-BORDER REGION ENRICHED BY WIDE-OPEN SPACES OF DESERT BEAUTY

BY ELENA ACOBA

CULTURAL DIVERSITY

Southern Arizona has been home to humans for thousands of years, from American Indian cultures, Spanish colonists and Mexican citizens to early American settlers and today's diverse mix.

The **Amerind Museum** in Dragoon reveals the lives of the first peoples in the Western Hemisphere. The 124-year-old **Arizona State Museum** in Tucson covers regional anthropology and boasts the world's largest collection of Southwest Indian pottery.

Learn about Spanish and Mexican influences and see what Colonial fort life was like with exhibits and living history interpreters at **Tubac Presidio State Historic Park** and **Presidio de San Agustín del Tucson,** both located on their original sites.

Pimeria Alta Historical Society and Museum, at the Old Nogales City Hall, traces the history of the U.S.-Mexico border region with rotating displays and a research library.

Territorial and early statehood life was defined by mining and ranching. Be sure to visit the nearby **Copper Queen Hotel** and the **Bisbee Mining & Historical Museum** to learn about mining and how this town was once one of the largest cities between St. Louis and San Francisco.

Mosey along the boardwalks of Tombstone, home of the shoot-out at the **O.K. Corral** and many preserved 18th- and 19th-century buildings. Mining and ranching also brought wealth to Douglas, where the opulent **Gadsden Hotel** still welcomes guests. See what happened to **Ruby, Fairbank** and **Kentucky Camp,** towns that went bust.

The Old West lives on at **Old Tucson,** a theme park that was the site of many Western films. The museum at the still-active **Fort Huachuca** U.S. Army base in Sierra Vista tells the tale of the famed African-American Buffalo Soldiers, who were stationed there during the American-Indian Wars. Tucson's transition from Spanish colony to American city is traced at four museums of the **Arizona Historical Society.**

Learn about the Cold War at the **Titan Missile Museum** in Sahuarita, the only remaining installation for the Titan II intercontinental ballistic missile.

Tucson has all the art and entertainment amenities of a vibrant big city. It is home to the **Tucson Symphony Orchestra** and hosts the **Arizona Theatre Company** and **Arizona Opera.** The **Arizona Friends of Chamber Music** puts on an impressive festival of world-renowned musicians every winter.



THE ROAD LESS TRAVELED

Venture off the main drag to explore some of these gems of the Tucson & Southern Arizona region.

- Arizona-Sonora Desert Museum, Tucson
- Mission San Xavier del Bac, Tucson
- Kartchner Caverns State Park, Benson
- Queen Mine Tours, Bisbee
- Arizona Zipline Adventures, Oracle
- Chiricahua National Monument, Willcox
- Organ Pipe Cactus National Monument, Ajo
- Wineries, Sonoita, Elgin and Willcox
- Patagonia Lake State Park, Patagonia
- Pima Air & Space Museum, Tucson
- Salsa Trail, Graham County
- Tucson Food Tours, Tucson
- Artist shops, Tubac
- Kitt Peak National Observatory, Sells


STEVE LAMBESIS


DOMINIC BONUCELLI

2


LARRY GEDDIS

3


LARRY GEDDIS

4


MARK LYPCZYNSKI

5

1 St. Augustine Cathedral, Tucson

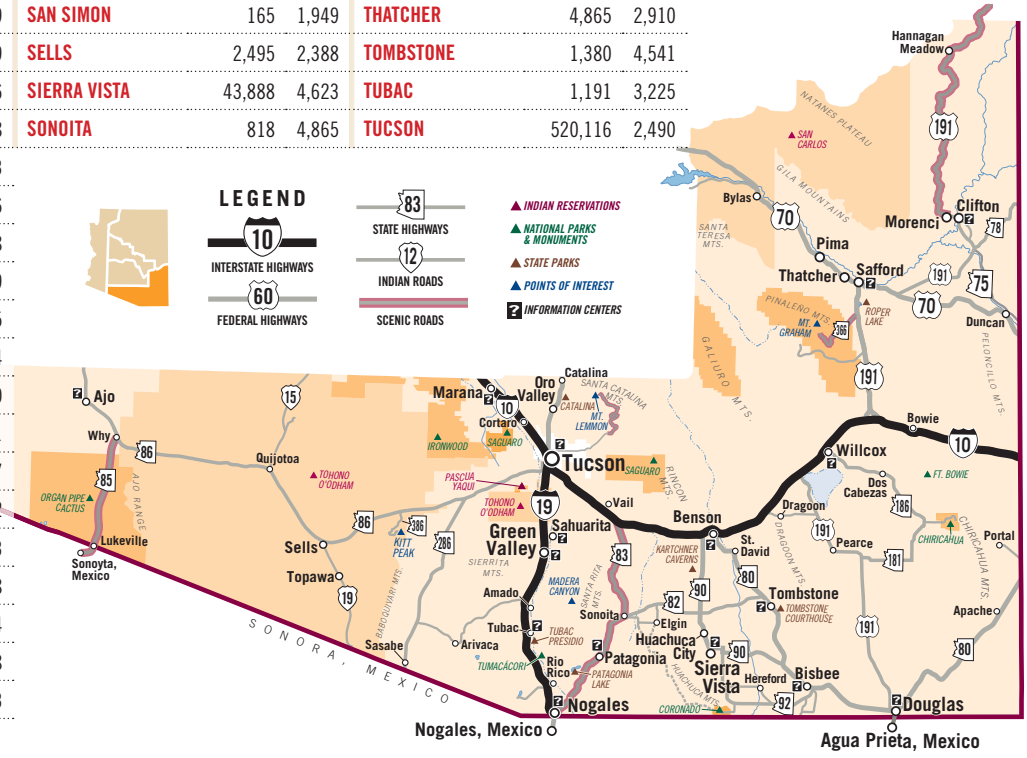
2 Sonoran-style hot dogs, Tucson

3 Local art in Tubac

4 Organ Pipe Cactus National Monument, Why

5 47 Scott, Tucson

CITY	POP.	ELEV. (IN FEET)
AJO	3,304	1,759
ARIVACA	695	3,629
BENSON	5,105	3,586
BISBEE	5,575	5,538
BOWIE	449	3,763
CATALINA	7,569	3,156
CLIFTON	3,311	3,478
DOUGLAS	17,378	4,009
DUNCAN	696	3,655
GREEN VALLEY	21,391	2,904
HUACHUCA CITY	1,853	4,400
MARANA	34,961	1,991
MORENCI	1,489	4,747
NOGALES	20,837	3,832
ORO VALLEY	41,011	2,543
PATAGONIA	913	4,058
PEARCE-SUNSITES	1,260	5,194
PIMA	2,387	2,838
RIO RICO	18,962	3,553
SAFFORD	9,566	2,917
SAHUARITA	25,259	2,703
SAN SIMON	165	1,949
SELLS	2,495	2,388
SIERRA VISTA	43,888	4,623
SONOITA	818	4,865
SOUTH TUCSON	5,652	2,425
ST. DAVID	1,699	3,645
THATCHER	4,865	2,910
TOMBSTONE	1,380	4,541
TUBAC	1,191	3,225
TUCSON	520,116	2,490
WHY	167	1,791
WILLCOX	3,757	4,167



A range of visual art styles and periods is found at the **Tucson Museum of Art,** the **Museum of Contemporary Art,** the **University of Arizona Museum of Art** and several local galleries. The archives of Ansel Adams and Edward Weston are among the collections at the internationally respected **Center for Creative Photography.**

Tucson is full of nighttime dining, dancing, music and endless people-watching. Take **Sun Link,** the modern street car, to entertainment centers on funky **Fourth Avenue,** in vibrant **downtown Tucson** and at college-oriented **Main Gate Square.**

Play, dine and be entertained at the **Desert Diamond** casinos, an enterprise of the Tohono O'odham Nation; **Casino of the Sun;** and luxurious **Casino Del Sol Resort.**

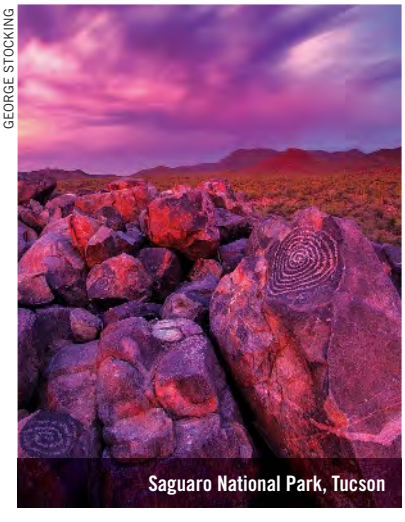
ALL FOR THE FAMILY

Make lifetime memories for everyone in the clan. Start with the beauty of the most lush scenery on the planet.

Nature is never far away. Tucson is flanked to the east and west by cactus-studded **Saguaro National Park.** Hike or tour creek-fed **Sabino Canyon.** Follow a guide through dry **Colossal Cave.** The Nature Conservancy's **Ramsey Canyon Preserve** in Hereford protects native wildlife.

Meet more than three dozen species of animals from around the world at Tucson's **Reid Park Zoo.** Watch wild bats along Campbell Avenue over the Rillito River as they fly off at dusk to feed.

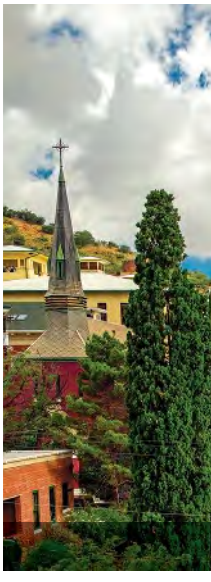
GEORGE STOCKING



Saguaro National Park, Tucson

Southern Arizona's dark skies are perfect for stargazing. Tour scopes at the **Fred Lawrence Whipple Observatory** in Amado and Eastern Arizona College's **Discovery Park** in Safford. Or look through one at the University of Arizona's **Flandrau Science Center & Planetarium** in Tucson.

Kids can let loose at the hands-on **Children's Museum Tucson** or its Oro Valley satellite. They'll delight in the no-touch exhibits of doll houses and tiny spaces at **The Mini Time Machine Museum of Miniatures.**



Cool off year-round at the indoor zero-depth, beach-entry pool at Sierra Vista's **The Cove.**

Get your heart pumping at the **Disruptive Paintball & Airsoft** field in Marana or the **Musselman Honda Circuit** track in Tucson.

Find a wide range of shopping adventures, from exclusive boutiques to bargain outlet malls, including the **Tucson Premium Outlets** in Marana. For local artist offerings, check out the galleries and shops in **Patagonia,** the **Tubac** artisan village and **Bisbee's** historic Main Street. Visit the

latter, and you'll understand why it was included on Frommer's prestigious list of Best Places to Go in 2018.

Into spectator sports? One of the top 25 professional rodeos in North America, **La Fiesta de los Vaqueros,** kicks off in Tucson, while the **Tohono O'odham Nation Rodeo & Fair,** in Sells and Sonita, has contests for working cowboys.

FC Tucson hosts spring **Major League Soccer** training games and men's summer **Professional Development League.**

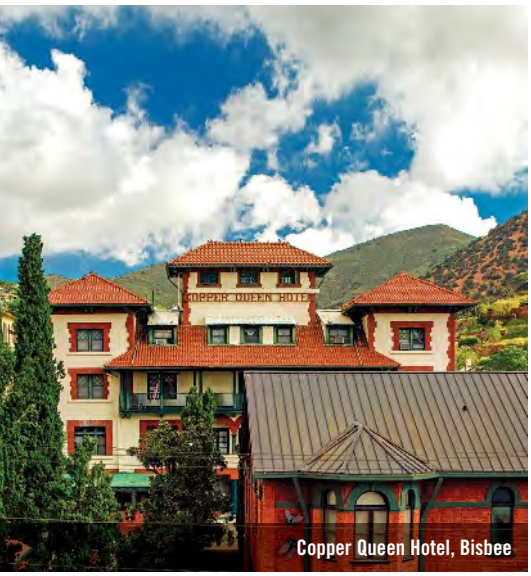
Watch the greats of the PGA Champions Tour compete in the **Conquistadores Classic** each March in Tucson.

The whole family can participate in **El Tour de Tucson,** the largest perimeter bicycling event in the United States. Eight distances, from the competitive 106 miles to the quarter-mile fun ride, provide something for every cyclist every November.

AAH-SOME TIMES

Let nature relax you. Recreate on shore or in the water at **Patagonia Lake, Parker Canyon Lake** near Sierra Vista or **Roper Lake** in Safford.

Bring binoculars for spectacular **birding** along a major migratory corridor



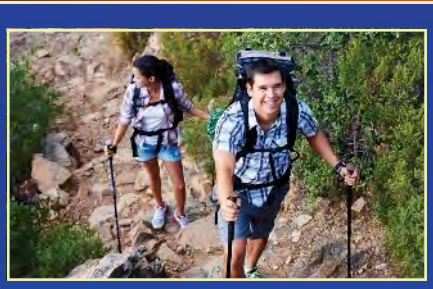
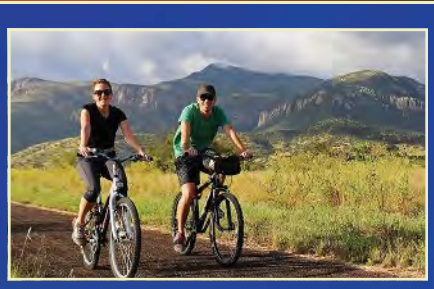
Copper Queen Hotel, Bisbee

MARK LYPCZYNSKI

through **Sierra Vista, Patagonia, Sonoita, Madera Canyon** and the **Huachuca Mountains.** Take on challenging **Fantasy Island** mountain bike trails near Tucson or ski among pine forests atop **Mt. Lemmon.**

End an outdoorsy day with a relaxing soak in one of Safford's numerous **hot springs.**

CREATE LEGENDARY ADVENTURES



Hiking, biking, birding, and climbing in the Land of Legends


Willcox Wine Trail

SAVOR **LEGENDARY** TASTES
Immerse your taste buds in the heart of Arizona's wine growing region


Tombstone

DISCOVER THE **LEGENDARY** WILD WEST
Roam the streets and trails walked by true life legends


Kartchner Caverns State Park

EXPLORE **LEGENDARY** LANDSCAPES
Roam over 6,000 square miles of expansive, pristine landscapes

ARIZONA
Cochise County

COCHISE COUNTY
Land of Legends

EXPLORECOCHISE.COM

BENSON • BISBEE • DOUGLAS • SIERRA VISTA • TOMBSTONE • WILLCOX

For more luxurious pursuits, pamper yourself at the world-renowned **Canyon Ranch** or **Miraval** spa resorts in Tucson.

Take in a round or two of **golf** at more than 50 courses throughout the region. Walk or bike the more than 100 miles of **The Loop,** which follows waterways through the Tucson metropolis.

Engage your senses and find tranquility at the **Reid Park Rose Garden, Tohono Chul Park, Tucson Botanical Gardens** and **Yume Japanese Gardens.**

Get in touch with your spiritual side at the contemplative **Holy Trinity Benedictine Monastery** in St. David and the Spanish Colonial mission that's now **Tumacácori National Historical Park** near Tubac.

FOODIE DELIGHTS

UNESCO (United Nations Educational, Scientific and Cultural Organization) named Tucson its first U.S. World City of Gastronomy, in part for its rich culinary adventures.

EXPEDITION FOODIE AZ

Good food is a perfect excuse for an Arizona road trip - start planning at ExpeditionFoodieAZ.com

Prior to the Gadsden Purchase, Tucson was part of Mexico, so the area's Mexican cuisine couldn't be more authentic. Sonoran-style **El Charro Café, El Guero Canelo's** iconic bacon-wrapped Sonoran hot dogs and former south-of-the-border **Elvira's** speak to the region's ties to Northern Mexico. **Café Poca Cosa's** menu changes every day, depending on what fresh ingredients chef Suzana Davila finds. **South Tucson** is popular for its many Mexican restaurants that are decades old and family run.

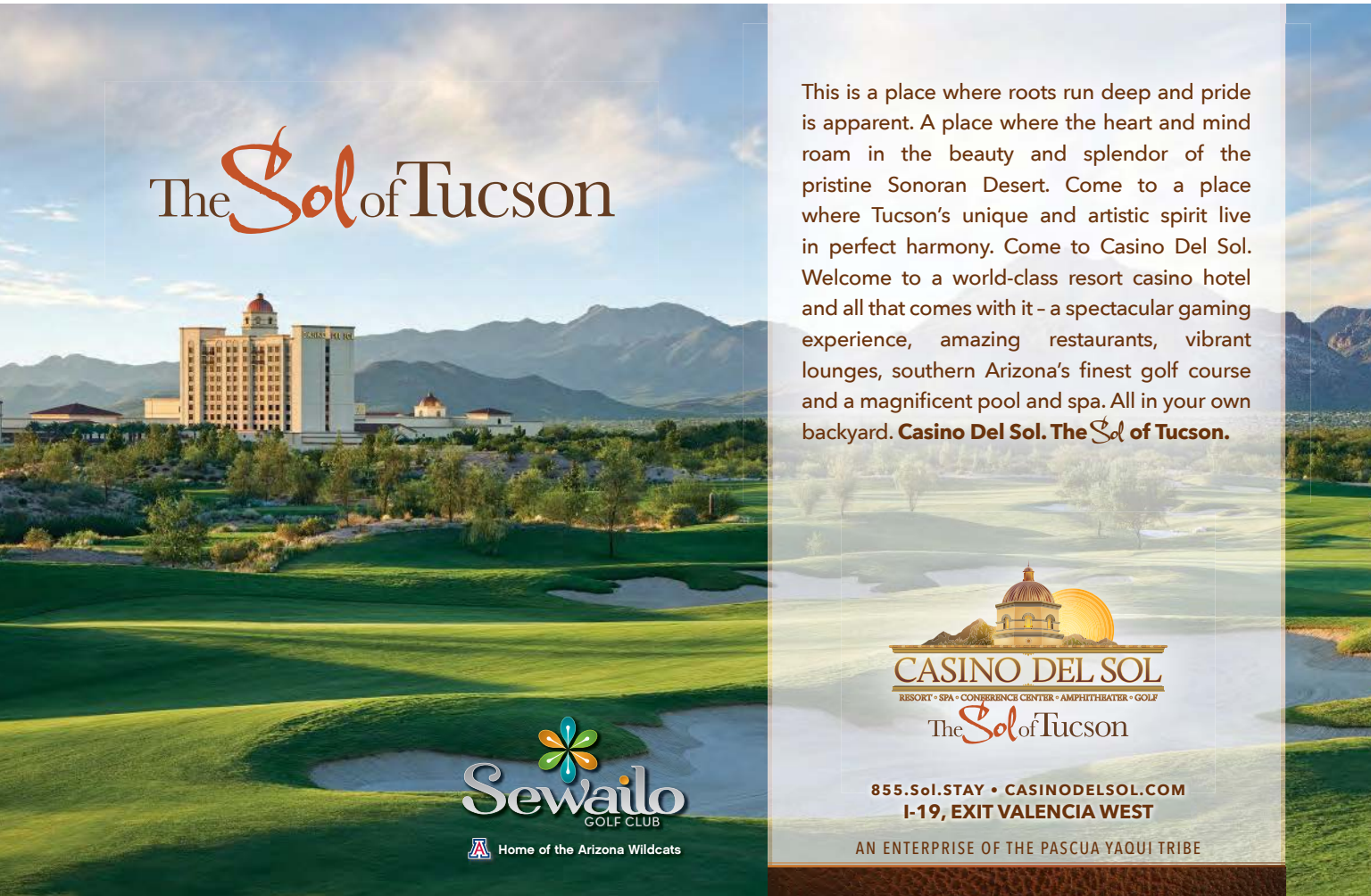

Café Poca Cosa, Tucson

ARIZONA OFFICE OF TOURISM

You can find culinary delights outside Tucson, too. **Café Roka** in Bisbee focuses on locally sourced ingredients for a fine-dining experience. **The German Café** brings authentic European dishes to Sierra Vista. Grab a slice of unforgettable pizza at **Velvet Elvis Pizza Company** in Patagonia.

The UNESCO designation also recognizes the history of food. Tucson's **Mission Garden** is a museum that traces the history of the area's agriculture by growing wild, cultivated and farmed plants. Head outside Tucson and enjoy the simple pleasure of fresh food at Willcox **U-Pick farms and orchards.**

The region is steeped in craft breweries and distilleries. Sip on locally made Del Bac whiskey at **Hamilton Distillers** or belly up to the bar at **Pueblo Vida Brewing Company,** both in Tucson. AZ



RESOURCE GUIDE

AMERICAN INDIAN TRIBES

Pascua Yaqui Tribe Tucson
The sovereign nation of the Pascua Yaqui Tribe traces its existence to A.D. 552 and are original inhabitants of the Rio Yaqui Valley and Sonoran region of present-day Mexico and the Southwestern United States. Visit the Casino Del Sol and the 4,400-seat Anselmo Valencia Tori Amphitheater (AVA).
(520) 883-5000, pascuayaqui-nsn.gov

Tohono O'odham Nation Sells
Located in the Sonoran Desert of Southern Arizona, the 2.8-million-acre combined lands of the Tohono O'odham comprise the second-largest reservation in the United States and boast a cultural center and museum, four Desert Diamond casinos, Kitt Peak National Observatory and the historic Mission San Xavier del Bac.
(520) 383-2028, tonation-nsn.gov

COMMUNITY INFORMATION

See page 99 for visitor information centers in Tucson and Southern Arizona.

NATIONAL FORESTS

Apache-Sitgreaves National Forests Springerville
(928) 333-4301, www.fs.usda.gov/asnf

Coronado National Forest Tucson
(520) 388-8300, www.fs.usda.gov/coronado

NATIONAL WILDLIFE REFUGES

For more information, visit fws.gov.

Buenos Aires Sasabe
(520) 823-4251

Cabeza Prieta Ajo
(520) 387-6483

Leslie Canyon Douglas
(520) 364-2104

San Bernardino Douglas
(520) 364-2104

PUBLIC LANDS

For public lands usage information, visit blm.gov/arizona.

Arizona State Land Department Phoenix
(602) 542-4631, land.az.gov

Chiricahua National Monument Willcox
(520) 824-3560, nps.gov/chir

Coronado National Memorial Hereford
(520) 366-5515, nps.gov/coro

Fort Bowie National Historic Site Bowie
(520) 847-2500, nps.gov/fobo

Gila Box Riparian National Conservation Area Safford
(928) 348-4400

Graham County Parks, Fair and Racing Safford
(928) 428-7180, graham.az.gov

Ironwood Forest National Monument Tucson
(520) 258-7200

Las Cienegas National Conservation Area Tucson
(520) 258-7200

Organ Pipe Cactus National Monument Ajo
(520) 387-6849, nps.gov/orpi

Pima County Natural Resources, Parks and Recreation Department Tucson
(520) 724-5000, pima.gov

Saguaro National Park Tucson
(520) 733-5153, nps.gov/sagu

San Pedro Riparian National Conservation Area Sierra Vista
(520) 439-6400

Santa Cruz County Parks Nogales
(520) 375-7920, co.santa-cruz.az.us

Tumacacori National Historical Park Tumacacori
(520) 377-5060, nps.gov/tuma

SELECT BLM WILDERNESS AREAS

Baboquivari Peak 50 miles southwest of Tucson
(520) 258-7200, blm.gov/arizona

Redfield Canyon 32 miles north of Benson
(928) 348-4400, blm.gov/arizona

STATE PARKS, GAME & FISH

Arizona Game and Fish Department Phoenix
(602) 942-3000, azgfd.gov

Arizona State Parks Phoenix
(602) 542-4174, azstateparks.com

Catalina State Park Tucson
(520) 628-5798

Kartchner Caverns State Park Benson
(520) 586-4100

Patagonia Lake State Park Patagonia
(520) 287-6965

Roper Lake State Park Safford
(928) 428-6760

Sonoita Creek State Natural Area Patagonia
(520) 287-2791

Tombstone Courthouse State Historic Park Tombstone
(520) 457-3311

Tubac Presidio State Historic Park Tubac
(520) 398-2252

Visit VisitArizona.com for additional recreation options.



EXPLORE TUCSON & SOUTHERN ARIZONA

ATTRACTION

Amerind Museum Dragoon 2100 N. Amerind Rd., (520) 586-3666, amerind.org
A museum, art gallery and research center dedicated to archaeology, native cultures and Western art.

Arizona Rafting Scottsdale Trips meet at the Salt River near Globe, (800) 231-7238 or (719) 395-2112, saltriverraftingarizona.com
World-class guided whitewater rafting trips in the Salt River Canyon wilderness. Half-, full- and multi-day camping trips.

Arizona-Sonora Desert Museum Tucson 2021 N. Kinney Rd., (520) 883-2702, desertmuseum.org
Zoo, gardens, art gallery, cave and aquarium. Now with the only stingray touch experience of its kind in Southern Arizona!

Big Nose Kate's Saloon Tombstone 417 E. Allen St., (520) 457-3107, bignosekate.com
Relive the Old West, dress up and take pictures behind the bar for free. Live music, great food and fun. Hangings by appointment.

Casino Del Sol Tucson 5655 W. Valencia Rd., (855) 765-7829 or (520) 838-6700, casinodelsol.com
With slots, table games, poker, bingo and concerts, Casino Del Sol is Arizona's gaming and entertainment destination.
See ad on page 64.

Kitt Peak National Observatory Tucson Hwy. 86 (Ajo Way), Jct. 386, (520) 318-8726, noao.edu/KPVC
Open daily, 9 a.m.–3:45 p.m. Guided daytime tours, special events and nightly stargazing programs by pre-registration.

Old Tucson Tucson 201 S. Kinney Rd., (520) 883-0100, oldtucson.com
Where the spirit of the Old West comes alive! Tours, live shows, vintage rides, native village, amazing BBQ and unique shops.

BED AND BREAKFAST

Dos Cabezas Retreat Bed & Breakfast Willcox 7101 E. White Pacheco St., (520) 507-1244, doscabezasretreat.com
Minutes to hiking and wine tasting. Year round-birding. Dramatic views and stargazing. Private ensuites with dining options.

DESTINATION INFORMATION

Benson Visitor Center Benson 249 E. 4th St., (520) 586-4293, bensonvisitorcenter.com
Come to the Benson Visitor Center and operate our G scale model trains. We'll even give you a train operators certificate.
See ad on this page.

Bisbee Visitor Center Bisbee 478 Dart Rd., (520) 432-3554, discoverbisbee.com
Named "Best Historic Small Town in America" by USA Today. Bisbee is a quirky, charming, artsy and entertaining mining town.
See ad on this page.

Cochise County Tourism Council Bisbee 1415 Melody Ln., Bldg. G, (520) 432-9200, explorecochise.com
Arizona's Land of Legends—amazing landscapes, wine tasting, year-round birding, hiking, biking and the authentic Old West.
See ad on page 63.

Discover Bisbee Bisbee PO Box 1642, 478 Dart Rd., (520) 432-3554, discoverbisbee.com
Bisbee's creative spirit is legendary. Here you'll find a forward-looking town with a remarkably well-preserved past.

Discover Copper Corridor Superior 830 US Highway 60, (520) 490-8433, discovercoppercorridor.org
Visit the Copper Corridor for an authentic Arizona experience. Authentic foods, arts, history, and adventure await.

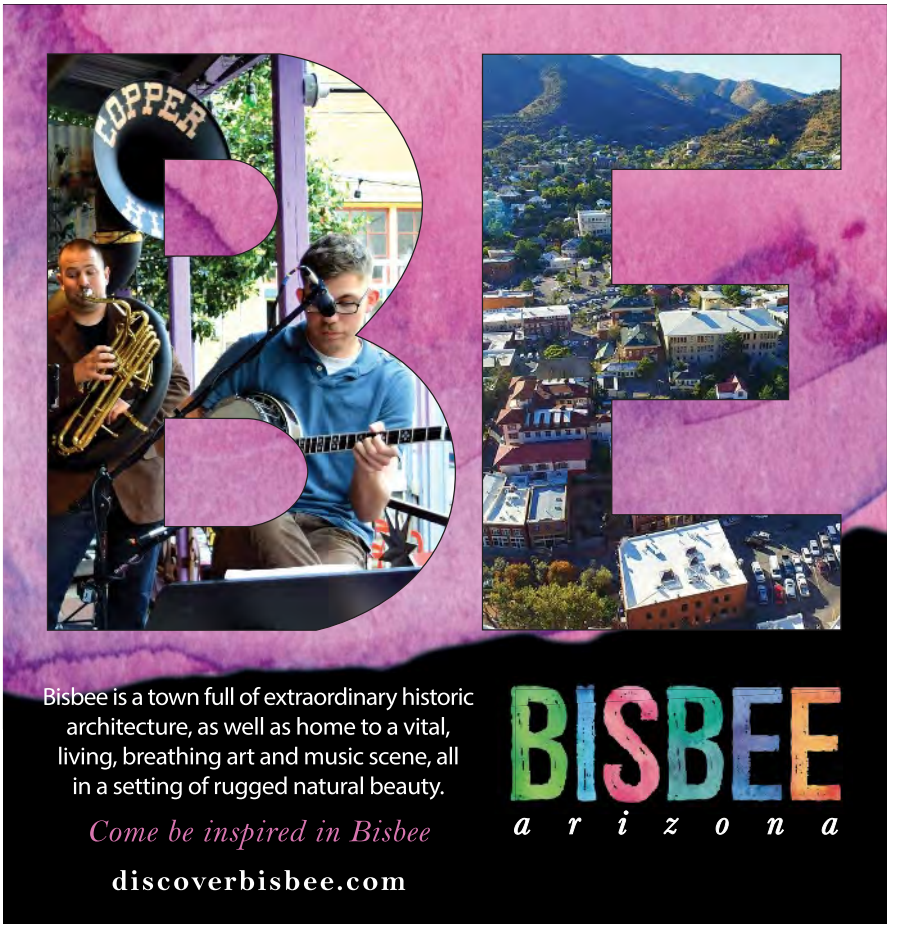
Graham County Chamber of Commerce Safford 1111 Thatcher Blvd., (888) 837-1841 or (928) 428-2511, graham-chamber.com, visitgrahamcounty.com
Graham County: A multitude of events, festivals and gatherings plus 4+ million acres of scenic outdoors to explore and enjoy!

Sierra Vista Visitor Center Sierra Vista 3020 E. Tacoma St., (800) 288-3861 or (520) 417-6960, visitsierravista.com
Wide open for adventure where earth and sky meet. Sierra Vista: extraordinary skies, uncommon ground.

Tombstone Chamber of Commerce Tombstone 109 S. 4th St., (888) 457-3929 or (520) 457-9317, tombstonechamber.com
Daily tours, historic museums and action-packed activities. Come and experience "The Town Too Tough to Die."

SYMBOL KEY

Electric vehicle charging station on-site
Pets allowed





Visit Tucson Tucson 100 S. Church Ave., (800) 638-8350 or (520) 624-1817, visittucson.org
Venture off the beaten path. You'll be amazed at the stories you can tell with Tucson as your guide. Free yourself.
See ad on page 65.

Willcox Wine Country Willcox 1500 N. Circle I Rd., (800) 200-2272 or (529) 384-2272, willcoxwinecountry.org
Welcome to Willcox Wine Country, home to nine tasting rooms. Willcox AVA grows ¾ of Arizona's wine grapes. Enjoy great wine.

DINING

Big Nose Kate's Saloon Tombstone 417 E. Allen St., (520) 457-3107, bignosekates.com ***AMERICAN***
Best cowboy bar in the West. Live music, great food and never-ending fun. Once The Grand Hotel, now a National Historic Landmark.

Cafe Margarita Tombstone 131 S. 5th St., (520) 457-2277, cafe-margarita.com ***MEXICAN***
Fresh salsa, margaritas, assorted Mexican beers, a wide variety of tequilas. The real flavors of Mexico and a touch of Italy.

The Longhorn Restaurant Tombstone 501 E. Allen St., (520) 457-3405, thelonghornrestaurant.com ***SOUTHWESTERN/REGIONAL***
Oldest continually operated restaurant in Tombstone was once the Bucket of Blood Saloon. Family-friendly menu, daily specials.

Primo Restaurant Tucson 3800 W. Starr Pass Blvd., (520) 792-3500, primotucson.com ***MEDITERRANEAN***
Enjoy a seasonal menu prepared with fresh ingredients, produce and herbs from local growers and organic on-site gardens.

PY Steakhouse Tucson 5655 W. Valencia Rd., (855) 765-7829 or (520) 324-9350, casinodelsol.com/tucson-dining/py-steakhouse ***STEAKHOUSE***
PY Steakhouse is a four-star restaurant known for its award-winning wine list, the finest cuts of meat and fresh seafood.
See ad on page 64.

SHOPPING

La Encantada Tucson 2905 E. Skyline Dr., (520) 299-3566, laencantadashoppingcenter.com
The only luxury shopping center in Southern Arizona delivering top brands like Louis Vuitton, Tiffany & Co. and J. Crew.

The Shady Lady's Closet Tombstone 406 E. Allen St., (520) 457-2562, theshadyladyscloset.com
Casual, business, Western wear and accessories, 1880s and Victorian pieces, ladies' footwear. The best for quality, price and style.

SPA

Hashani Spa at JW Marriott Starr Pass Tucson 3800 W. Starr Pass Blvd., (520) 791-6117, hashanispa.com
Hashani Spa combines the latest in beauty and health with ancient healing traditions in a luxurious, pampering environment.

Hiapsi Spa Tucson 5655 W. Valencia Rd., casinodelsol.com/tucson-spa
Hiapsi Spa offers guests a full menu of rejuvenating spa services, including massages, body scrubs, facials and more.
See ad on page 64.

Sonoran Spa Tucson 245 E. Ina Road, (800) 722-2500 or (520) 297-1151, westwardlook.com/sonoran-spa
The Sonoran Spa at Westward Look Wyndham Grand Resort & Spa offers a rejuvenating retreat from today's sensory overload.

Accommodations

= AZLTA-Certified Green Lodging (see page 102)
= Electric vehicle charging station on-site
$ = $75 or less • $$ = $76–$150 • $$$ = $151–$250 • $$$$ = $251 or more

	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
GUEST RANCH																		
Circle Z Ranch, Patagonia (888) 854-2525 • (520) 394-2525 • circlez.com	18		•		•			•	•	•				•				$$$–$$$$
Elkhorn Ranch, Tucson (520) 822-1040 • elkhornranch.com	20		•	•			•	•	•	•				•				$$$$
HOTEL																		
Best Western InnSuites Tucson Foothills, Tucson (520) 297-8111 • insuites.com	158	•	•		•	•		•	•	•		•		•	•	•	•	$–$$$
Choice Hotels, Region-wide (888) 846-9378 • choicehotels.com/arizona# • *see ad on page 1*			•					•	•	•		•			•	•	•	$–$$$$
Hilton Tucson East, Tucson (800) 445-8667 • (520) 721-5600 • tucsoneast.hilton.com	232			•	•	•	•	•	•	•		•				•	•	$$–$$$$
Hyatt Place Tucson Airport, Tucson (520) 295-0405 • hyattplace.tucsonairport.com	120	•	•		•	•		•	•	•		•			•	•	•	$$–$$$
Sheraton Tucson Hotel & Suites, Tucson (888) 625-4988 • (520) 323-6262 • sheratontucson.com	216			•	•	•	•	•	•	•		•			•	•	•	$$–$$$
RESORT																		
Casino Del Sol, Tucson (855) 765-7829 • (520) 838-6700 • casinodelsol.com • *see ad on page 64*	215			•	•	•	•	•	•	•	•	•	•			•	•	
Hacienda Del Sol Guest Ranch Resort, Tucson (800) 728-6514 • (520) 299-1501 • haciendadelsol.com	59			•	•	•	•	•	•	•	•	•			•	•	•	$$–$$$$
JW Marriott Starr Pass Resort & Spa, Tucson (888) 236-2427 • (520) 792-3500 • jwmarriottstarrpass.com	575			•	•	•	•	•	•	•	•	•	•	•		•	•	$$$–$$$$
Tubac Golf Resort & Spa, Tubac (800) 848-7893 • (520) 398-2211 • tubacgolfresort.com	99			•	•	•		•		•	•	•	•	•	•	•	•	$$–$$$$
Westward Look Wyndham Grand Resort and Spa, Tucson (800) 722-2500 • (520) 297-1151 • westwardlook.com	241			•	•	•	•	•	•	•	•	•		•	•	•	•	$$–$$$$

RV Parks

	NUMBER OF SPACES	PARK MODELS FOR RENT	SENIOR ADULT PARK	PETS ALLOWED	LAUNDRY	SWIMMING POOL	ORGANIZED ACTIVITIES	INTERNET ACCESS	GOLF ON-SITE	TENNIS ON-SITE	RESTAURANT	EXERCISE FACILITIES	HOT TUB/ JACUZZI	RECREATIONAL FACILITIES	ADA COMPLIANT
AZ Association of RV Parks & Campgrounds, Sedona arizonaarvc@aol.com • gocampinginarizona.com	500	•	•	•	•	•	•	•	•	•	•	•	•	•	•

Golf

PB = PUBLIC • SP = SEMI-PRIVATE

	NUMBER OF HOLES	PAR	YARDAGE	RATING	SLOPE	PUBLIC/ SEMI-PRIVATE	DRESS CODE	ADVANCED BOOKING POLICY	GOLF SHOP	BAR/LOUNGE	RESTAURANT
Sewailo Golf Club, Tucson (855) 765-7829 • (520) 838-6623 • casinodelsol.com/sewailogolfclub • *see ad on page 64*	18	72	7283	73.5	138	PB	•	•	•	•	•
Starr Pass Golf Club, Tucson (520) 792-3500 • jwmarriottstarrpass.com	27	5	7713	71.7	142	SP	•		•	•	•
Tubac Golf Resort & Spa, Tubac (800) 848-7893 • (520) 398-2021 • tubacgolfresort.com	27	72	6870	71.6	130	PB	•	•	•	•	•

NORTHERN ARIZONA

MOTHER NATURE'S SCENERY AND AMERICAN INDIAN COUNTRY COMBINE FOR A MEMORABLE, MAGICAL VISIT

BY ELENA ACOBA

OUTDOOR ODYSSEYS

Majestic. Awe-inspiring. Spectacular. Sublime. No adjective is too strong to describe the Grand Canyon and its one mile deep, 277 miles long and 18 miles wide of awesomeness. **Grand Canyon National Park** provides experiences from a few hours to a few days, including motorized tours, scenic drives, hiking trails, guided hiking tours, rafting on the Colorado River, ranger talks, camping, shopping, dining and lodging. Enjoy views of the Grand Canyon from 15,000 feet above Tusayan by taking part in a tandem skydive offered by **Paragon Skydive.** Make reservations early as some activities and accommodations fill up months in advance.

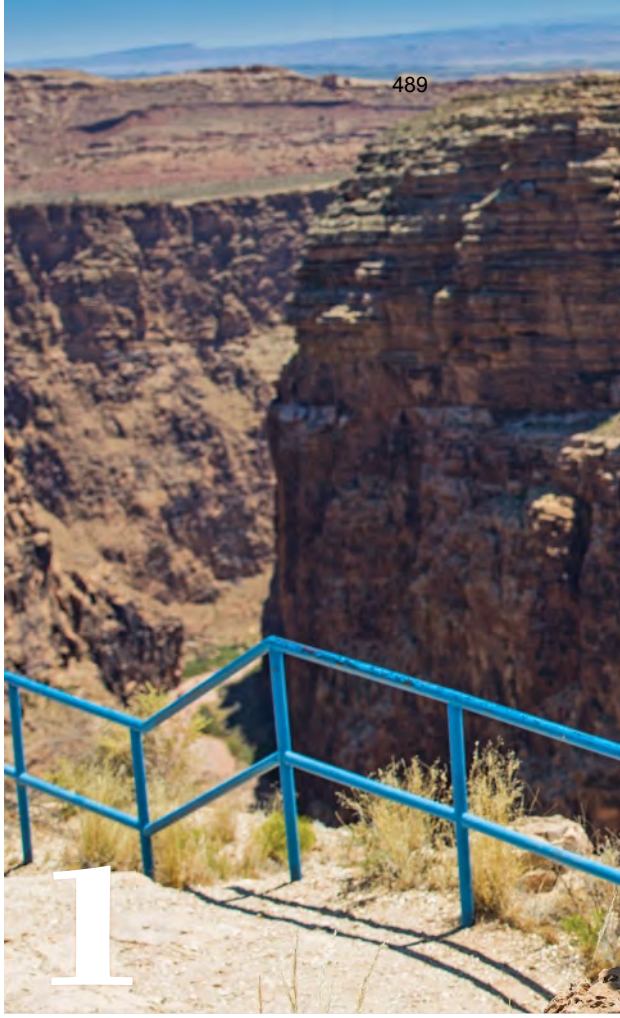
For the hardy hiker and off-trail camper, find quiet at remote **Vermilion Cliffs National Monument** near Page, distinctive for its hills of colorful bands of sandstone, or amid the desolate beauty of outcroppings rising from the floor of **Coal Mine Canyon** near Tuba City. Tackle the five-mile Humphreys Trail to the highest point in Arizona: 12,633-foot-high **Humphreys Peak** overlooking Flagstaff.

Hike around the landscape of **Sunset Crater Volcano National Monument,** near Flagstaff, to see what a nearly century-old eruption left in its wake or head underground to see what's left of an ancient lava tube at **Lava River Cave.**

Make a splash at **Lees Ferry,** outside Page, for easy access to the Colorado River before it flows through the Grand Canyon. The adventurous can also take a whitewater rafting trip starting there.

Ponderosa pine forests cover Northern Arizona, and most are protected from development in the **Coconino, Kaibab** and **Apache-Sitgreaves National Forests,** as well as on Navajo and White Mountain Apache tribal lands. Outdoor activities are limited only by your imagination—enjoy hiking, camping, climbing, fishing, hunting, bicycling, cross-country skiing and more.

Take an otherworldly trip to **Meteor Crater** near Winslow. It's a 550-foot-deep remnant of a meteor strike about 50,000 years ago. Walk along part of the rim and learn about meteors at the Interactive Discovery Center.



THE ROAD LESS TRAVELED

Venture off the main drag to explore some of these gems of the Northern Arizona region.

- Flagstaff Extreme Adventure Course, Flagstaff
- Arizona Snowbowl, Flagstaff
- Bearizona Wildlife Park, Williams
- Grand Canyon Railway, Williams
- Houseboat on Lake Powell, Page
- Canyon de Chelly National Monument, Chinle
- Sunrise Park Resort, Greer
- Petrified Forest National Park, Holbrook
- Standin' on the Corner Park, Winslow
- Monument Valley Tribal Park, Navajo County
- Navajo National Monument, Shonto
- Hopi Arts Trail, Navajo County


ARIZONA OFFICE OF TOURISM



LARRY GEDDIS



NICK BEREZENKO



KERRICK JAMES



ANDREW COELHO

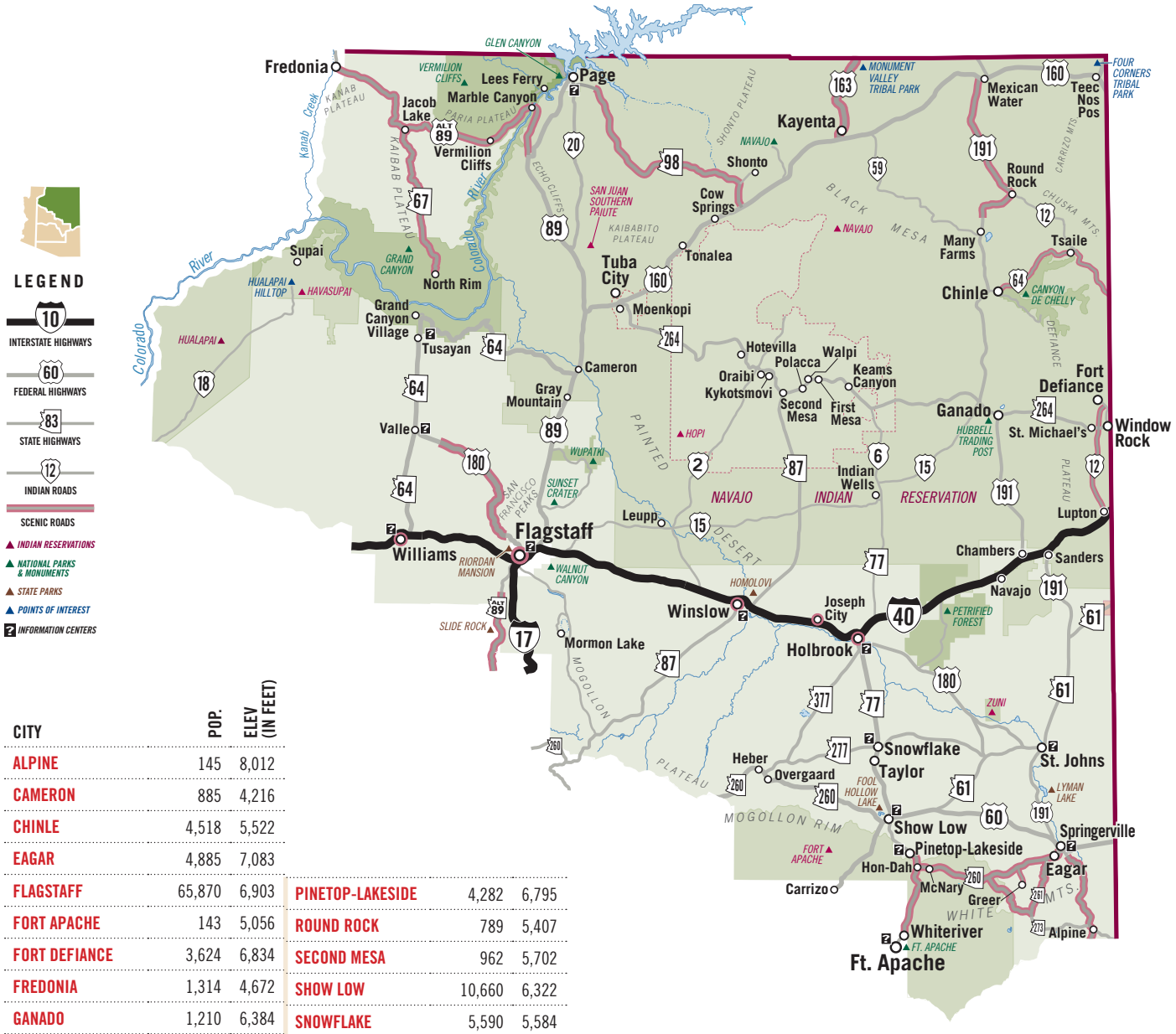
1 Little Colorado River Gorge

2 Coal Mine Canyon, Tuba City

3 White Mountains, Pinetop-Lakeside

4 Coconino National Forest, Flagstaff

5 Monument Valley, Kayenta



CITY	POP.	ELEV (IN FEET)
ALPINE	145	8,012
CAMERON	885	4,216
CHINLE	4,518	5,522
EAGAR	4,885	7,083
FLAGSTAFF	65,870	6,903
FORT APACHE	143	5,056
FORT DEFIANCE	3,624	6,834
FREDONIA	1,314	4,672
GANADO	1,210	6,384
GRAND CANYON VILLAGE	2,004	6,886
GREER	41	8,356
HEBER-OVERGAARD	2,822	6,627
HOLBROOK	5,053	5,082
HOTEVILLA	957	6,319
JOSEPH CITY	1,386	5,007
KAYENTA	5,189	5,640
KEAMS CANYON	304	6,188
KYKOTSMOVI VILLAGE	746	5,682
LUPTON	25	6,188
MANY FARMS	1,348	5,312
PAGE	7,247	4,350
PINETOP-LAKESIDE	4,282	6,795
ROUND ROCK	789	5,407
SECOND MESA	962	5,702
SHOW LOW	10,660	6,322
SNOWFLAKE	5,590	5,584
SPRINGERVILLE	1,961	6,972
ST. JOHNS	3,480	5,679
SUPAI	208	3,192
TAYLOR	4,112	5,633
TEEC NOS POS	730	5,213
TSAILE	1,205	7,044
TUBA CITY	8,611	4,961
TUSAYAN	558	6,594
VALLE	832	5,994
WHITERIVER	4,104	5,246
WILLIAMS	3,023	6,768
WINDOW ROCK	2,712	6,890
WINSLOW	9,655	4,852

FAMILY TOGETHERNESS

Every generation of the family can enjoy a variety of outdoor activities. Bands of beige, rose, cream, rust and laurel sandstone color the hills and buttes of the **Painted Desert** along AZ Hwy. 89 through the Navajo Nation. Drive the entire 135 miles from Flagstaff to Page for views of the volcanic fields and Ancestral Puebloan ruins.

Make your family's vacation lakeside by staying at **Lake Powell Resort,** where you can lounge by the shore, rent watercraft or book a lake tour. Rent a canoe or kayak and paddle around **Fool Hollow Lake Recreation Area** in Show Low, or try your hand at waterskiing at **Lyman Lake State Park** near St. Johns.

If seeing animals is on your to-do list, the **Navajo Nation Zoo and Botanical Park,** in the Navajo capital city

of Window Rock, cares for nearly 50 species of animals native to the tribal nation that spreads into Arizona, New Mexico and Utah.

Wide-open spaces and funky small towns make road trips a fun, casual way to see Northern Arizona. Take to the open road on iconic **Route 66.** The spirit of the cross-country Mother Road highway lives on with diners, motels and attractions in Seligman, Williams, Flagstaff, Winslow and Holbrook.



GEORGE STOCKING

Wupatki National Monument, north of Flagstaff

NATIVE LIFEWAYS AND U.S. HISTORY

Feel the spirit, see the history and explore the lives of American Indian tribes, including the Navajo, Hopi and Apache.

Casa Malpais Archaeological Park, in Springerville, preserves a kiva, rock art and an astronomical calendar, as well as artifacts from this site of an ancient Mogollon culture.

Walk along and around the cliff pueblos of the Sinagua and other ancient communities at **Walnut Canyon National Monument** east of Flagstaff. Visit Sinagua ancient pueblo sites that rise from the desert floor, including one that preserves portions of a 100-room community at **Wupatki National Monument** north of Flagstaff.

Fort Apache Historic Park, of the White Mountain Apache Tribe, traces the history of Zuni and Hopi peoples with the Kinishba Ruins, Apache artifacts and a walking tour of Apache Wars-era buildings.

The **Museum of Northern Arizona** in Flagstaff offers a good introduction to all of the cultures of the Colorado Plateau—from ancient peoples,

THE CENTER OF THE GRAND CIRCLE

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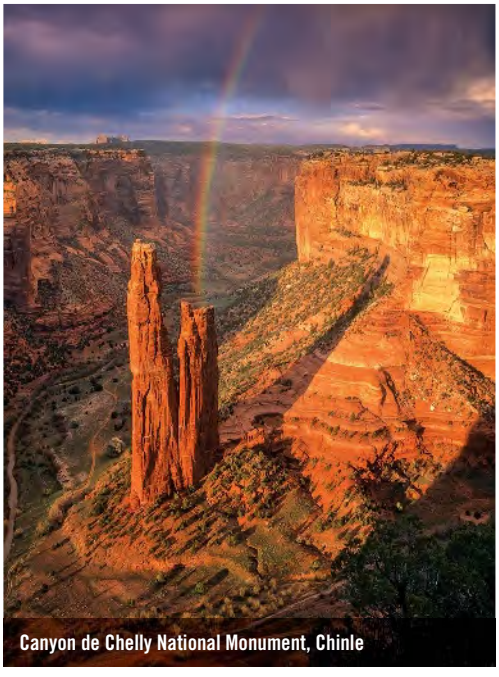
1894 - Observatory Founded
1930 - Pluto Discovered
1977 - Rings of Uranus Discovered
2012 - DCT Sees First Light
2018 - Pluto Telescope Renovated



•Daytime Tours
•Telescope Viewing
•Science Demonstrations
•Interactive Exhibits

1400 W Mars Hill Rd
Flagstaff, AZ 86001
www.lowell.edu | 928-774-3358

GEORGE STOCKING


Canyon de Chelly National Monument, Chinle


Hopi Arts Trail, Hopi Mesas


Dinosaur Tracks, Tuba City

ARIZONA OFFICE OF TOURISM

through U.S. settlement, to today's communities. Exhibits, nature trails and annual heritage festivals cover human folkways and fine art, as well as animal and plant life through the ages.

Find both traditional crafts and modern American Indian art, including silversmithing, baskets, rugs and sand paintings, at the many roadside stands within the Navajo Nation, as well as at the growing art centers in Tuba City and Window Rock. The latter is also a fine place to find restaurants and food stands serving frybread and traditional mutton stew. Experience the American Indian culture firsthand at the oldest continuously operated trading post on the Navajo Nation, **Hubbell Trading Post National Historic Site** in Ganado.

Life in Arizona territorial days is described at the **Riordan Mansion State Historic Park** in Flagstaff or in the walking tour of dozens of historically significant **Snowflake** homes, some of which are mini museums.

OUT & ABOUT

Historical settings abound in the culinary scene, too. Experience the rustic stone and pinewood surroundings and elegant setting of **El Tovar Dining Room & Lounge** inside the 112-year-old lodge at the Grand Canyon. The



ARIZONA OFFICE OF TOURISM

Turquoise Room at La Posada Hotel & Gardens in Winslow combines contemporary Southwest dishes with the feel of a Fred Harvey House, a chain of early 20th-century rest stops for Southwest travelers. Enjoy fine dining at the **Red Raven Restaurant** in historic downtown Williams, which is right on Route 66.

Order the famous chilaquiles at **Mart-Anne's Burrito Palace** on Route 66 in Flagstaff for a hearty Mexican breakfast. **Diablo Burger,** also in Flagstaff, uses local ingredients, including beef raised just outside of town.

For refined American comfort food and an extensive wine list, dine at **Tinderbox Kitchen** in Flagstaff. Just a block away, fill your glass with local and imported craft beer at **Historic Brewing Co. Barrel+Bottle.**

Add gaming and entertainment to your menu at the **Twin Arrows Casino Resort** in Flagstaff and the **Hon-Dah Resort Casino and Conference Center** in Pinetop. Both are run by American Indian tribes. **AZ**

THE LOCAL WORD

Embark on your own Arizona adventure after reading about everyday experiences around the state—at **VisitArizona.com** under the Planning tab.

494

tall peaks | deep canyon

A PEAK **12,633 FEET IN ELEVATION**
AND HIGHEST POINT IN ARIZONA

A CANYON **6,000 FEET DEEP**
AND ONLY **80 MILES FROM FLAGSTAFF**

flagstaffarizona.org

PHOTO BY TOM ALEXANDER

SAN FRANCISCO PEAKS

GRAND CANYON NATIONAL PARK

Flagstaff
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PICK UP A **FREE VISITOR GUIDE** AT THE
FLAGSTAFF VISITOR CENTER, 1 E. ROUTE 66

RESOURCE GUIDE

AMERICAN INDIAN LANDS

Havasupai Tribe Supai
Featuring the stunning Havasu and Mooney waterfalls and welcoming campsites, the Havasupai Reservation—located at the bottom of the Grand Canyon—offers an exotic experience for nature lovers.
(928) 448-2121, havasupai-nsn.gov

Hopi Tribe Kykotsmovi
The Hopi village of Oraibi is the oldest continuously inhabited community in the U.S. The Hopi are excellent dry farmers, and local artisans are famous for Katsina doll carvings, basketry, weaving, pottery, and silver and gold jewelry. Each of the 12 Hopi villages, spanning three mesas, features ceremonies and shares an underlying sense of reverence for healthy and happy living. Visitors should inquire at the Moenkopi Legacy Inn, adjacent to Tuba City, or at the Hopi Cultural Center, located on Second Mesa, for attractions and cultural activities open to the public.
(928) 283-4500, experiencehopi.com

Kaibab Band of Paiute Indians Fredonia
Located along the Arizona-Utah border on the famed Arizona Strip, these scenic lands are just a short trip away from Toroweep, Parashant–Grand Canyon, Vermilion Cliffs and Pipe Spring national monuments, plus the Grand Canyon's North Rim.
(928) 643-7245, kaibabpaiute-nsn.gov

Navajo Nation Window Rock
Larger than many U.S. states, the lands of the Navajo Nation encompass 27,000 square miles of diverse and stunning landscapes, including such well-known landmarks as Monument Valley and Canyon de Chelly. The tribe is known for its artfully crafted rug weavings and turquoise-and-silver jewelry.
(928) 810-8501, discovernavajo.com

San Juan Southern Paiute Tribe Tuba City
This small community, bordered by Navajo and Hopi lands, prides itself on basket weaving and farming.
(928) 283-4762

White Mountain Apache Tribe Whiteriver
There's plenty to do on this beautiful Eastern Arizona reservation. Try fishing, camping, hiking, skiing, elk hunting or gaming, and don't miss Fort Apache's Cultural Center Museum and the prehistoric Kinishba ruins four miles west of Fort Apache.
(928) 338-4346, wmat.nsn.us

Zuni Pueblo Zuni, New Mexico
Zuni Pueblo is partially located in the southern portion of Arizona's Apache County but is mostly in New Mexico. Visit this ancient community to experience scenic beauty, historic and archaeological tours, and world-famous authentic traditional arts.
(505) 782-7238, www.zunitourism.com

COMMUNITY INFORMATION

See pages 100 for visitor information centers in Northern Arizona.

NATIONAL FORESTS

Apache-Sitgreaves National Forests Springerville
(928) 333-4301, www.fs.usda.gov/asnf

Coconino National Forest Flagstaff
(928) 527-3600, www.fs.usda.gov/coconino

Kaibab National Forest Williams
(928) 635-8200, www.fs.usda.gov/kaibab

PUBLIC LANDS

For public lands usage information, visit blm.gov/az.

Arizona State Land Department Phoenix
(602) 542-4631, land.az.gov

Canyon de Chelly National Monument Chinle
(928) 674-5500, nps.gov/cach

Coconino County Parks and Recreation Flagstaff
(928) 679-8000, coconino.az.gov

Glen Canyon National Recreation Area Page
(928) 608-6200, nps.gov/glca

Grand Canyon National Park Grand Canyon
(928) 638-7888, nps.gov/grca

Hubbell Trading Post National Historic Site Ganado
(928) 755-3475, nps.gov/hutr

Navajo County Parks and Recreation Department Holbrook
(928) 524-4000, navajocountyaz.gov

Navajo National Monument Shonto
(928) 672-2700, nps.gov/nava

Petrified Forest National Park Holbrook
(928) 524-6228, nps.gov/pefo

Pipe Spring National Monument Fredonia
(928) 643-7105, nps.gov/pisp

Sunset Crater Volcano National Monument Flagstaff
(928) 526-0502, nps.gov/sucr

Vermilion Cliffs National Monument St. George, Utah
(435) 688-3200, blm.gov/arizona





Make your special trip to the Grand Canyon even more memorable by traveling aboard a vintage train along a century-old rail line. With six classes of carefully restored passenger service, you'll journey back in time through pine forests and wide-open prairies as musicians play the tunes of the West on this entertaining Grand Canyon expedition. Start your journey at **THETRAIN.COM** or **1-800-THE-TRAIN**.



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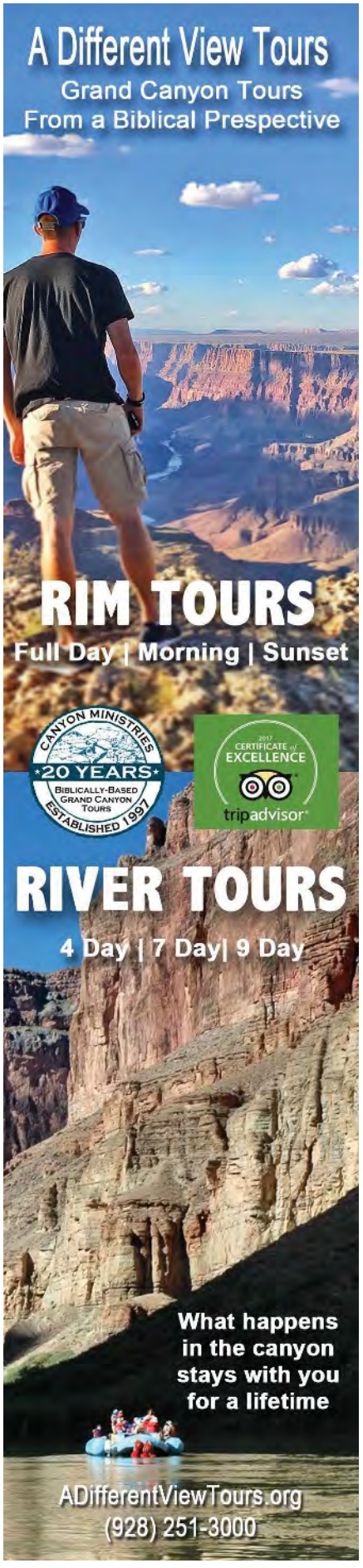
When you stay at one of our six lodges on the South Rim, you're just minutes away from everything that makes the canyon so extraordinary: mule rides, motorcoach tours, casual and fine dining, shopping, and all the breathtaking views.

The South Rim of Grand Canyon National Park is open year-round, so you can experience the canyon in all four seasons.

Plan your trip at **grandcanyonlodges.com** or call **1-888-29-PARKS (297-2757)**.

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Walnut Canyon National Monument Flagstaff
(928) 526-3367, nps.gov/waca

Wupatki National Monument Flagstaff
(928) 679-2365, nps.gov/wupa

STATE PARKS, GAME & FISH

Arizona Game and Fish Department Phoenix
(602) 942-3000, azgfd.gov

Arizona State Parks Phoenix
(602) 542-4174, azstateparks.com

Fool Hollow Lake Recreation Area Show Low
(928) 537-3680

Homolovi State Park Winslow
(928) 289-4106

Lyman Lake State Park St. Johns
(928) 337-4441

Riordan Mansion State Historic Park Flagstaff
(928) 779-4395

Visit VisitArizona.com for additional recreation options.

EXPLORE NORTHERN ARIZONA

ATTRACTION

Antelope Canyon Tours, Inc. Page PO Box 936, 22 S. Lake Powell Blvd., (866) 645-9102 or (928) 645-9102, antelopecanyon.com
Providing guided tours into Upper Antelope Canyon—an amazing slot canyon formed over centuries by water and wind.

Antelope Point Marina - Lake Powell Page 537 Marina Pkwy., (800) 255-5561 or (928) 645-5900, lakepowellhouseboating.com
Join us on the lake for houseboating, wakeboarding, fishing, boat tours, a great meal and shopping at our floating village.

Bearizona Wildlife Park Williams 1500 E. Rt. 66, (928) 635-2289, bearizona.com
Drive through to see North American wildlife in natural habitats. Walk through for smaller animals and an amazing raptor show.
See ad on page 74.

Explore Navajo Museum Tuba City 10 N. Main St., (800) 644-8383 or (928) 640-6084, explorenavajo.com
Explore Navajo Museum is a great addition to any itinerary. So much to see and learn about the Navajo Nation. Come explore!

Grand Canyon Railway & Hotel Williams 233 N. Grand Canyon Blvd., (800) 843-8724 or (928) 773-1976, thetrain.com
Stay at the railway's hotel and take the train to the Grand Canyon, just like visitors did in 1901. All aboard for the Grand Canyon!
See ad on page 75.

Lowell Observatory Flagstaff 1400 W. Mars Hill Rd., (928) 774-3358, lowell.edu
Discover the home of Pluto! Tour our historic campus, peer through the Clark telescope and explore interactive space exhibits.
See ad on page 72.

National Geographic Visitor Center–IMAX Grand Canyon 450 AZ Hwy. 64, (928) 638-2468, explorethecanyon.com
Grand Canyon: The Hidden Secrets in IMAX. Purchase park passes, free maps, exhibits and tours. Explorer's Café with Pizza Hut Express. A mile from South Rim entrance.
See ad on page 82.

SYMBOL KEY

Electric vehicle charging station on-site
Pets allowed

Thunderbird Lodge Tours Chinle Indian Rte. 7, (800) 679-2473 or (928) 674-5842, thunderbirdlodge.com
Explore the beauty and history of Canyon De Chelly with experienced Navajo guides on Pinzgauer vehicles! Four-hour and all-day tours.

Twin Arrows Casino Resort Flagstaff 22181 Resort Blvd., (855) 946-8946 or (928) 856-7200, twinarrows.com
More to love! Play more than 1,000 slots and blackjack, dine at one of our four restaurants or stay in our AAA Four Diamond hotel.
See ad on page 79.

DESTINATION INFORMATION

Flagstaff Visitor Center Flagstaff 1 E. Rt. 66, (888) 551-6789 or (928) 213-2951, flagstaffarizona.org
Located in the historic train station in downtown, the Flagstaff Visitor Center is your one stop for travel information.
See ad on page 73.

Grand Canyon Chamber & Visitor's Bureau Grand Canyon 469 AZ Hwy. 64, (844) 638-2901 or (928) 638-2901, grandcanyoncvb.org
Welcome to the Grand Canyon! Your local source for information on all attractions and lodging in and around the South Rim.
See ad on page 77.

Navajo Tourism Department Window Rock PO Box 663, (928) 810-8500, discovernavajo.com
Yaateeh. Welcome to Navajo land (Dine Bekeyah). Retrace history and step back in time. Visit the Navajo Nation.
See ad on page 79.

Page Lake Powell Visitors Center Page 6 N. Lake Powell Blvd., (888) 261-7243 or (928) 645-9496, visitpagelakepowell.com
Horseshoe Bend, slot canyons, Lake Powell, Colorado River, Glen Canyon Dam and National Recreation Area, Rim Trail and more!
See ad on page 71.

Town of Pinetop-Lakeside Pinetop-Lakeside 518 W. White Mountain Blvd., (928) 367-4290, pinetoplakeside.com
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See ad on page 81.

Winslow Chamber of Commerce/Visitor Center Winslow 523 W. 2nd St., (928) 289-2434, winslowarizona.org
Located in the historic Winslow Hubbell Trading Post building, we are the source to find out about all that is Winslow.
See ad on page 81.

DINING

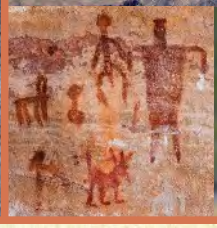
Big E Steakhouse and Saloon Tusayan 365 AZ Hwy. 64, (928) 638-0333, bigesteakhouse.com ***STEAKHOUSE***
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Desert View Trading Post & Deli Grand Canyon 1 Desert View Hwy. 64, (928) 638-3150, visitgrandcanyon.com ***DELI***
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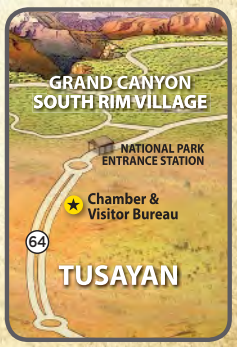






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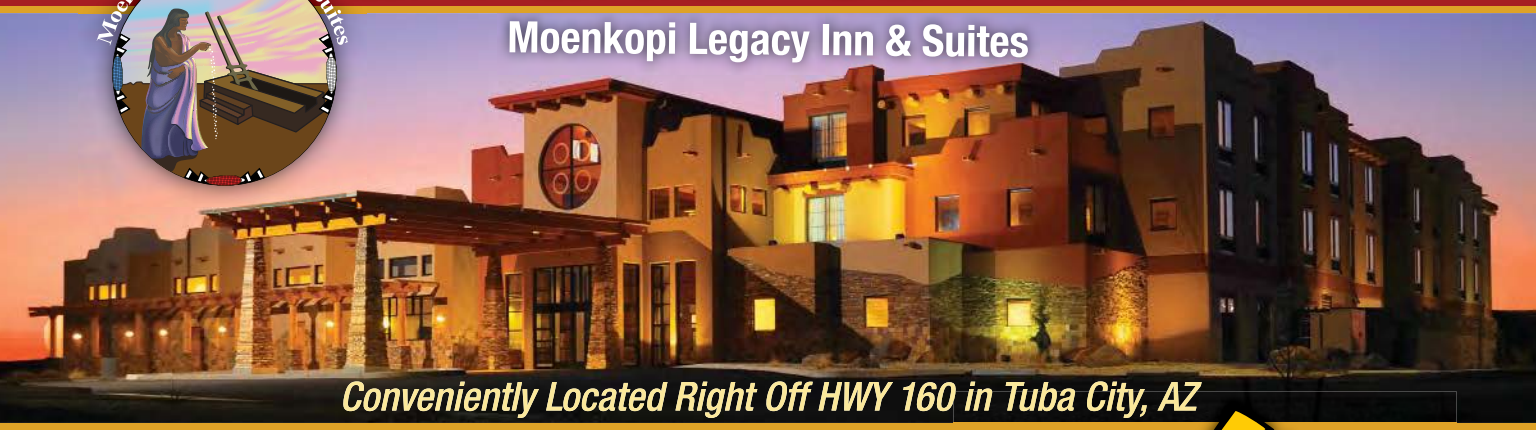
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Mormon Lake Lodge Steakhouse Mormon Lake 1991 S. Mormon Lake Rd., (928) 354-2227, mormonlakelodge.com ***STEAKHOUSE***
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Yavapai Lodge Restaurant Grand Canyon 11 Yavapai Lodge Rd., (877) 404-4617 or (928) 638-4001, visitgrandcanyon.com ***AMERICAN***
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Yavapai Tavern Grand Canyon 11 Yavapai Lodge Rd., (877) 404-4617 or (928) 638-4001, visitgrandcanyon.com ***SOUTHWESTERN/REGIONAL***
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SHOPPING

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Desert View General Store Grand Canyon 1 Desert View Hwy. 64, (877) 404-4617 or (928) 638-2393, visitgrandcanyon.com
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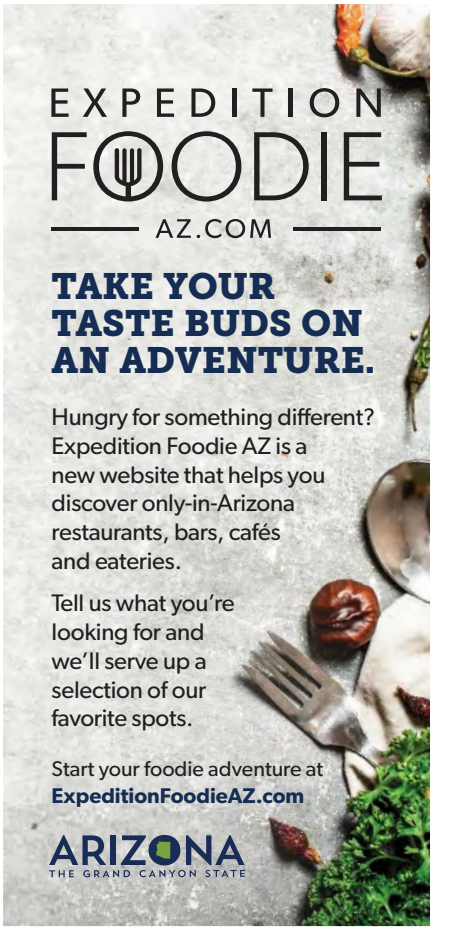




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A Different View Tours Parks PO Box 50571, (928) 251-3000, adifferentviewtours.com
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See ad on page 76.

Antelope Canyon Navajo Tours LeChee
Navajo Tribal Park parking lot, AZ Hwy. 98, (928) 698-3384, navajotours.com
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Arizona River Runners Inc. Grand Canyon (800) 477-7238 or (602) 867-4866, raftarizona.com
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Canyoneers Inc. Grand Canyon (800) 525-0924 or (928) 526-0924, canyoneers.com
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Goulding's Lodge & Tours Monument Valley 1000 Main St., (435) 727-3231, gouldings.com
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Meteor Crater Enterprises, Inc. Winslow I-40, Exit 233, (800) 289-5898 or (928) 289-2362, meteorcrater.com
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See ad on this page.

Pink Jeep Tours Grand Canyon Grand Canyon National Park Tusayan, 450 AZ Hwy. 64, (800) 999-2137, pinkjeeptoursgrandcanyon.com
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AZ Association of RV Parks & Campgrounds, Flagstaff arizonaarvc@aol.com • gocampinginarizona.com	500	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Canyon Motel & RV Park, Williams (800) 482-3955 • (928) 635-9371 • thecanyonmotel.com	56	•	•	•	•	•		•						•	•
Mormon Lake Lodge RV Park and Campground, Mormon Lake (928) 354-2227 • mormonlakelodge.com	74			•	•						•			•	•
Trailer Village RV Park, Grand Canyon (877) 404-4611 • (928) 638-1006 • visitgrandcanyon.com	80			•	•			•			•				•



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ALL TYPES																		
Canyon Motel & RV Park, Williams (800) 482-3955 • (928) 635-9371 • thecanyonmotel.com	24						•	•	•	•							•	$–$$$
Grand Canyon National Park Lodges, Grand Canyon National Park (888) 297-2757 • (928) 638-2631 • grandcanyonlodges.com • *see ad on page 75*	522			•	•	•	•	•	•			•				•		$$–$$$$
CABINS																		
Grand Canyon Lodge - North Rim, Grand Canyon National Park - North Rim (877) 386-4383 • (928) 638-2611 • grandcanyonforever.com	218				•	•		•	•							•		$$–$$$
Mormon Lake Lodge, Mormon Lake (877) 386-4383 • (928) 354-2227 • mormonlakelodge.com	56				•	•			•						•	•		$–$$$$
HOTEL																		
Americas Best Value Inn & Suites, Flagstaff (928) 774-2779 • redlion.com/flagstaff?	28		•					•							•	•	•	$–$$$
Best Western Paint Pony Lodge, Show Low (800) 937-8376 • (928) 537-5773 • bestwestern.com	50	•	•		•	•	•	•	•			•			•	•	•	$$
Best Western Pony Soldier Inn, Flagstaff (800) 356-4143 • (928) 526-2388 • bestwestern.com/ponysoldierinnandsuites	75		•					•		•					•	•	•	$$–$$$$
Best Western Premier Grand Canyon Squire Inn, Tusayan (800) 622-6966 • (928) 638-2681 • grandcanyonsquire.com	318				•	•	•	•	•	•		•			•	•		$–$$$$
Choice Hotels, Region-wide (888) 846-9378 • choicehotels.com/arizona# • *see ad on page 1*			•					•	•	•		•			•	•	•	$–$$$$
Comfort Inn I-17 & I-40, Flagstaff (928) 774-2225 • comfortinn.com/hotel/az080	85		•					•	•	•		•			•	•	•	$$–$$$
Courtyard by Marriott Page at Lake Powell, Page (928) 645-5000 • (877) 905-4495 • marriott.com/PGACY	153				•			•	•	•		•	•		•	•	•	$$–$$$$
Grand Canyon Plaza Hotel, Grand Canyon/Tusayan (800) 995-2521 • (928) 638-2673 • grandcanyonplaza.com • *see ad on page 82*	232	•			•	•	•	•	•	•		•			•	•	•	$$–$$$$
Grand Canyon Red Feather Lodge, Grand Canyon (800) 538-2345 • (928) 638-2414 • redfeatherlodge.com • *see ad on page 78*	225				•	•		•	•	•					•	•	•	$–$$$

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Holiday Inn–Canyon De Chelly, Chinle (888) 465-4329 • (928) 674-5000 • holidayinnchinle.com	108				•			•	•	•		•				•	•	$–$$
Kayenta Monument Valley Inn, Kayenta (866) 306-5458 • (928) 697-3221 • kayentamonumentvalleyinn.com	163			•	•			•	•	•		•			•	•	•	$$–$$$$
La Posada Hotel & Gardens, Winslow (928) 289-4366 • laposada.org	53				•	•		•							•	•		$$–$$$
Little America Hotel, Flagstaff (800) 352-4386 • (928) 779-7900 • flagstaff.littleamerica.com	247	•		•	•	•		•	•	•		•				•	•	$$–$$$$
Quality Inn Lake Powell, Page (866) 645-8851 • (928) 645-8851 • explorenavajo.com	130	•	•		•			•	•	•					•	•	•	$$
Quality Inn Navajo Nation, Tuba City (800) 644-8383 • (928) 283-4545 • explorenavajo.com	80		•		•			•	•						•	•	•	$$–$$$
Quality Inn Navajo Nation Capital, Window Rock (800) 662-6189 • (928) 871-4108 • explorenavajo.com	56		•		•			•	•			•			•	•	•	$–$$
Sleep Inn Flagstaff, Flagstaff (928) 556-3000 • sleepinn.com/hotel/az822	56		•					•	•	•					•	•	•	$$–$$$
Thunderbird Lodge, Chinle (800) 679-2473 • (928) 674-5842 • explorenavajo.com	69				•			•							•	•	•	$–$$
Yavapai Lodge, Grand Canyon (877) 404-4617 • (928) 638-4001 • visitgrandcanyon.com	358				•	•		•							•	•	•	$$–$$$
MOTEL																		
Moenkopi Legacy Inn & Suites, Tuba City (928) 283-4500 • experiencehopi.com • *see ad on page 77*	100		•		•			•		•		•				•	•	$$
RESORT																		
Goulding's Lodge & Tours, Monument Valley (435) 727-3231 • gouldings.com	75	•			•			•	•	•		•			•	•	•	$$–$$$
Lake Powell Resort, Page (800) 528-6154 • (928) 645-2433 • lakepowell.com • *see ad on page 78*	348				•	•		•	•	•		•			•	•	•	$$–$$$$

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ATTRACTIONS

☐ Arizona State Parks	BC
☐ Bearizona Wildlife Park	74
☐ Casino del Sol Resort	64
☐ Cliff Castle Casino	97
☐ Commemorative Air Force Aviation Museum	54
☐ Grand Canyon Railway	75
☐ Hall of Flame Museum of Firefighting	54
☐ Lowell Observatory	72
☐ Meteor Crater Enterprises Inc.	80
☐ National Geographic Visitor Center - IMAX Theater	82
☐ Out of Africa Wildlife Park	49
☐ The Phoenix Zoo	48
☐ Rawhide Western Town & Steakhouse	46
☐ Spirit: Scottsdale's Museum of the West	52
☐ Twin Arrows Navajo Casino Resort	79

COMMUNITY INFORMATION

☐ City of Apache Junction	42
☐ City of Benson	66
☐ City of Bisbee	66
☐ City of Kingman Tourism Department	88
☐ City of Page	71
☐ Cochise County Tourism Council	63
☐ Cottonwood Chamber of Commerce	97
☐ Experience Scottsdale	40
☐ Flagstaff Convention & Visitors Bureau	73
☐ Grand Canyon Chamber & Visitor's Bureau	77
☐ Lake Havasu City CVB	89
☐ Navajo Tourism Department	79
☐ Parker Regional Chamber of Commerce and Tourism	91
☐ Salt River Pima-Maricopa Indian Community	56
☐ Sedona Chamber of Commerce & Tourism Bureau	95
☐ Superior Chamber of Commerce	58
☐ Town of Pinetop-Lakeside	81
☐ Visit Glendale	41
☐ Visit Mesa	47
☐ Visit Phoenix	45
☐ Visit Tucson	65
☐ Wild Horse Pass	43
☐ Winslow Chamber of Commerce	81
☐ Yuma Visitors Bureau	91

LODGING

☐ Aramark/Lake Powell Resorts & Marinas	78
☐ Choice Hotels International - Region 12	1
☐ CopperWynd Resort	58
☐ Forever Resorts	80
☐ Grand Canyon Plaza Resort	82
☐ Grand Canyon Resort Corporation	87
☐ Hassayampa Inn	94
☐ Holiday Inn Club Vacations Scottsdale Resort	48
☐ Moenkopi Legacy Inn & Suites	77
☐ The Phoenician	51
☐ Rancho de los Caballeros	44
☐ Red Feather Lodge	78
☐ Red Lion Hotel Corporation	53
☐ Sheraton Grand at Wild Horse Pass	55
☐ Talking Stick Resort	50
☐ The Westin Kierland Resort & Spa	57
☐ Xanterra Grand Canyon National Park Lodges	75

SHOPPING

☐ Macerich	39

SPORTS & RECREATION

☐ Goodyear Ballpark	54

TOURS & TRANSPORTATION

☐ A Different View Tours	76
☐ Hot Air Expeditions	52
☐ Phoenix Mesa Gateway Airport	49

IFC- Inside Front Cover, IBC- Inside Back Cover, BC-Back Cover

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O-OSVGSv-CY18

ARIZONA'S WEST COAST

HAVE FUN IN THE SUN AT ARIZONA'S PLAYGROUND: THE COLORADO RIVER AND ITS NEARBY COMMUNITIES

BY ELENA ACOBA

LIVE YOUR BLISS

From the rapids through the Hualapai tribal lands to the lazy waters heading south toward the Gulf of California, the **Colorado River** is an endless source of recreation and relaxation.

Find white-sand beaches and calming nature sounds at four state parks along the river: **Lake Havasu, River Island, Cattail Cove** and **Buckskin Mountain.** All have picnic tables, campsites and boat-launching facilities.

If camping isn't your thing, check out the **Nautical Beachfront Resort** in Lake Havasu City. It has a private boat launch, pool, water park, golf course and watersport rentals.

Wherever you start and end your day, fill the time in between exploring shorelines, coves and cliffs around **Lake Havasu, Topock Gorge** and **Lake Mohave.** Several companies run boat tours, such as the **Sunset Charter & Tour Co.** in Lake Havasu City. Others, like **Desert River Outfitters** out of Bullhead City, guide canoe and kayaking trips.

Lake Havasu, Bullhead City and the **Parker Strip** are famous for their high-thrill offerings on the water. Head out on a whitewater rafting adventure with **Hualapai River Runners** in Peach Springs. Rent fast-moving personal watercraft and speed boats for riding or waterskiing. Fly behind a boat in a parasail or jump on a flyboard to play like a dolphin.

For more contemplative activity, consider renting a paddleboard, canoe or kayak or lazily float in an inner tube.

Not a water baby? Snag a cabin at **Hualapai Mountain Park** in Kingman and enjoy its 10 miles of hiking, mountain biking and horseback riding trails through a variety of forested habitats.

CULTURAL EXCHANGES

Tribal lands along Arizona's West Coast are rich with adventure, thanks to the American Indian tribes that protect their cultural and natural heritage while also developing modern attractions.

Take **Grand Canyon West,** on the Hualapai tribal lands north of Kingman, where you can stay at a Western-style ranch and enjoy horseback riding and campfire dinners. Run the rapids of the Colorado River or take an airplane or

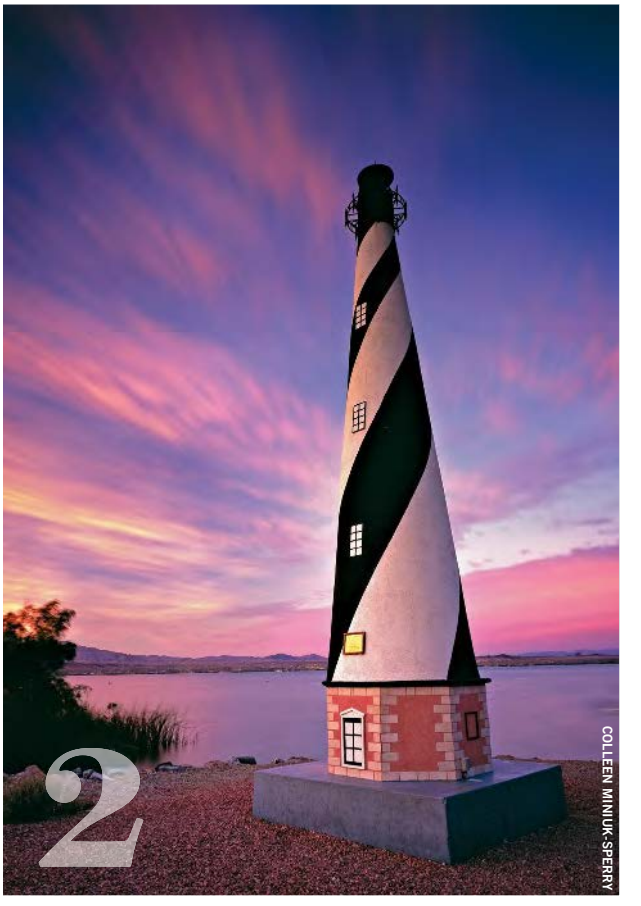


THE ROAD LESS TRAVELED

Venture off the main drag to explore some of these gems of the Arizona West Coast region.

- London Bridge, Lake Havasu City
- Miniature lighthouses, Lake Havasu City
- Yuma Territorial Prison State Historic Park, Yuma
- Hoover Dam, Mohave County
- Burros, Oatman
- Arizona Powerhouse Route 66 Museum, Kingman
- Grand Canyon West, Peach Springs
- Date shakes, Dateland
- Lake Mead National Recreation Area, Mohave County
- Castle Dome Mines Museum, Yuma
- Lake Havasu State Park, Lake Havasu City
- Drive the scenic Riverside Drive, Parker Strip
- Seasonal agricultural tours, Yuma


GRAND CANYON SKYWALK


COLLEEN MINIUK-SPERRY


KERRICK JAMES


MARK LAVERMAN


KERRICK JAMES

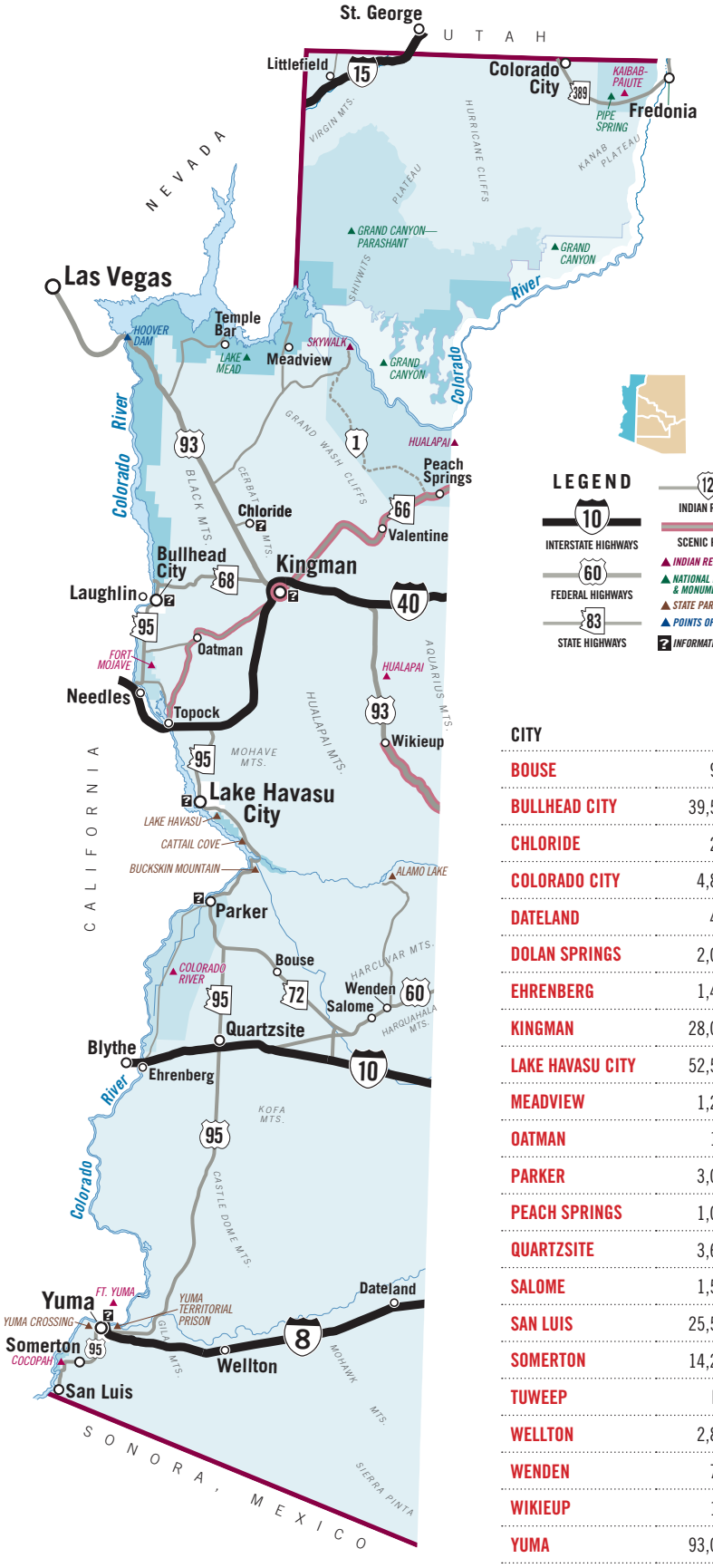
1 Grand Canyon Skywalk

2 Replica lighthouse, Lake Havasu City

3 Three Dunes campsite, Colorado River, Lake Havasu City

4 Havasupai Falls, Grand Canyon

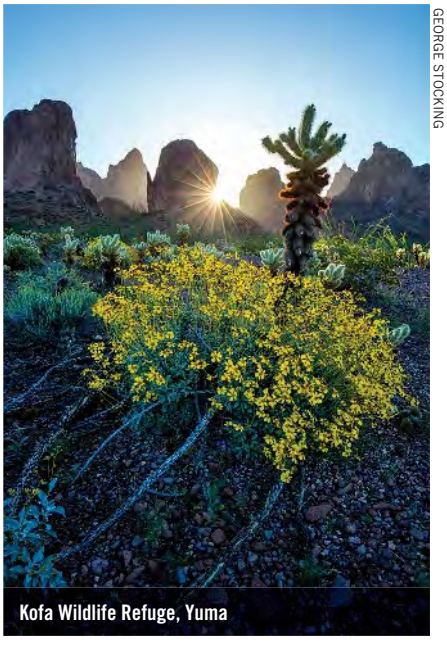
5 Lake Mojave, Colorado River, Bullhead City



CITY	POP.	ELEV. (IN FEET)
BOUSE	996	948
BULLHEAD CITY	39,540	558
CHLORIDE	271	4,022
COLORADO CITY	4,821	4,977
DATELAND	416	446
DOLAN SPRINGS	2,033	3,366
EHRENBERG	1,470	305
KINGMAN	28,068	3,350
LAKE HAVASU CITY	52,527	738
MEADVIEW	1,224	2,986
OATMAN	135	2,710
PARKER	3,083	423
PEACH SPRINGS	1,090	4,797
QUARTZSITE	3,677	879
SALOME	1,530	1,873
SAN LUIS	25,505	131
SOMERTON	14,287	105
TUWEEP	N/A	5,180
WELLTON	2,882	246
WENDEN	728	1,867
WIKIEUP	133	1,988
YUMA	93,064	141

helicopter tour above it. Hike to an old mine or to vistas over the river. Experience the biggest thrill at the **Grand Canyon Skywalk,** a glass walkway that gives you breathtaking views as you're suspended over the canyon.

Four cultures—Mohave, Chemehuevi, Hopi and Navajo—make up the Colorado River Indian Tribes (CRIT), a community centered in Parker. Visit the **CRIT Museum** to learn how the people of these communities converged on this area. Enjoy fishing, canoeing, birding and swimming in the community's **Ahakhav Preserve.** Visit


GEORGE STOCKING

Kofa Wildlife Refuge, Yuma

the **Poston Monument** to learn about the World War II internment of Japanese-Americans. Stay at the **BlueWater Resort & Casino** on the river for both watersports and gaming thrills.

There are other gaming venues where you can try your luck, as well as enjoy dining and entertainment. The **Paradise Casino** in Yuma is run by the Fort Yuma-Quechan Tribe, and the **Cocopah Casino, Resort & Conference Center** in Somerton is operated by the Cocopah Indian Tribe.

History attractions provide a glimpse into the lives of early settlers to the region. **Pipe Spring National Monument** reveals American Indian and Mormon settlements in the northwest corner of the state, near Fredonia.

Embark on the mother of all road trips on the 91-year-old Mother Road.

YOUR ADVENTURE AWAITS. GO WEST.





Travel to one of the Seven Natural Wonders of the World—and let Grand Canyon West provide you with an experience like no other. "Walk the sky" 4,000 feet above the Canyon floor on the Skywalk, and visit the wild west at the Hualapai Ranch, which includes horseback riding, a Root Beer Saloon, and tons to do for the whole family. Dine in the new Skywalk restaurant, and enjoy scenic canyon views from 3 viewpoints. All this and more awaits you at Grand Canyon West.

For more information on pricing and packages, visit our website at grandcanyonwest.com.

GREAT SEAL OF HUALAPAI TRIBE
1883
PEACH SPRINGS ARIZONA

GRAND CANYON West.COM

888-868-WEST (9378)
FIND US ON

Arizona has the longest intact section of the original Route 66. Stop at the **Hackberry General Store,** west of Valentine, for roadside memorabilia. Attractions, diners and abandoned buildings dot the landscape of the ultimate open road.

FAMILY ADVENTURES

A Route 66 attraction that captures the imagination of the whole family is **Grand Canyon Caverns** in Peach Springs. Ride an elevator 200 feet below ground to see what's billed as the largest dry caverns in the United States.

For other creature encounters, check out **Keepers of the Wild,** a Valentine sanctuary for rescued exotic animals; the **Alpacas of the Southwest** in Kingman; and the **Camel Farm** with a petting zoo in Yuma.

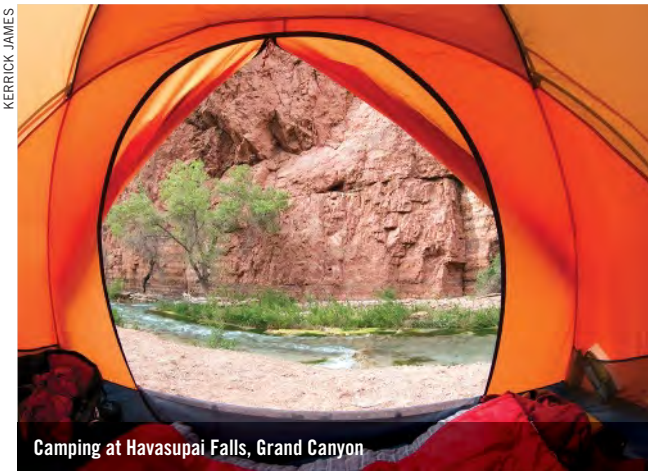
Not all water fun depends on the river. Spend the day at the indoor **Lake Havasu Aquatic Center,** full of slides and pools, or the outdoor **Waylon's Water World** in Yuma.

In Somerton, blow off energy with bowling, laser tag and arcade games at the **Cocopah Wild River Family Entertainment Center,** or watch racers blow by on the **Cocopah Speedway.** Test your skateboard, BMX and scooter skills at the **Patrick A. Tinnell Memorial Sports Complex** in Lake Havasu City.



Colorado River, Parker

MARK LYNCH/NSI



KERRICK JAMES

Camping at Havasupai Falls, Grand Canyon

ARIZONA'S BREADBASKET

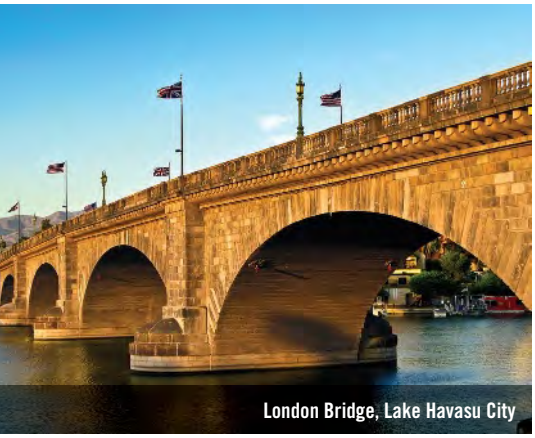
Yuma is the winter vegetable capital of the world, so it's natural that food is a big visitor attraction. Take a **Field to Feast** tour that starts with harvesting farm crops and ends with a



specially prepared lunch made from the harvest. **Savor Yuma** tours are progressive dinners featuring some of the city's popular restaurants.

Several date farms keep Yuma awash in the desert palm fruit. You must try a date shake from one of the markets or shops around town or book a **Date Night** dinner served right in a date grove.

Mix history with your meal. **Lutes Casino** in Yuma deals in libations and food in an early 1900s building that once housed a grocery and hotel. In Kingman, **Mr. D'z Route 66 Diner** serves up a sock-hop vibe with its 1950s-style burger-joint decor. **Dambar & Steakhouse** has been serving Kingman visitors and locals since it was converted from a Route 66 gas station in the 1950s to a bar a decade later.



MEINZAHN/ISTOCK

London Bridge, Lake Havasu City

Kingman is also home to **Cella Winery,** the area's first vineyard; **Stetson Winery,** with room for special events; and **Desert Diamond Distillery,** which crafts rum and vodka.

Combine more than 40 craft beers and live music at the annual **Rock'n'Brews** event at Lake Havasu City. Fill your glass with handcrafted beer at **College Street Brewhouse & Pub** in Lake Havasu City. Enjoy Yuma-brewed beers at **Prison Hill Brewing Company.** AZ

THE LOCAL WORD

Embark on your own Arizona adventure after reading about everyday experiences around the state—at VisitArizona.com under the Planning tab.

Escape to Arizona's Playground 510

WHERE FUN IS ALWAYS IN SEASON



LAKE HAVASU CITY

Play like you mean it.®







With more than 300 days of sunshine a year — and a unique mix of tranquil waters, rugged mountains, and tons of fun — it's hard to stay inside. Everywhere you look, folks are hiking, biking, boating, fishing, golfing, off-roading, shopping, dining, and enjoying seasonal events. Discover Lake Havasu City and *play like you mean it.®*



Call (800) 242-8278 to request your free Visitors Guide.

Play Like You Mean It® and the Lake Havasu City logo are registered marks of Lake Havasu Tourism Bureau Inc dba Lake Havasu City Convention & Visitors Bureau.

www.GoLakeHavasu.com

RESOURCE GUIDE

AMERICAN INDIAN TRIBES

Cocopah Indian Tribe Somerton
Visitors enjoy golfing, gaming, shopping, learning about the tribe's culture and traditions, and taking in the great scenic beauty of the region. Stop by the Museum and Cultural Center to view historic artifacts and cultural displays. Other attractions include Cocopah Casino, Cocopah Resort & Conference Center, Cocopah Rio Colorado Golf Course, Cocopah RV & Golf Resort, Cocopah Speedway and Wild River Family Entertainment Center.
(928) 627-2102, (928) 627-1992, cocopah.com

Colorado River Indian Tribes (CRIT) Parker
Home to four distinct tribes—Mohave, Chemehuevi, Hopi and Navajo—this community offers a wide variety of cultural attractions, including the Blythe Intaglios, a collection of Chemehuevi baskets and Mohave pottery at the CRIT Museum, the Poston Monument—a World War II Japanese internment camp memorial—and three landmarks on the National Register of Historic Places: 100-year Old Presbyterian Church, Old La Paz and Poston Elementary School.
(928) 669-9211, crit-nsn.gov

Fort Mojave Indian Tribe Needles, California
Located on the border of Arizona, Nevada and California, this tribe is known for its beautiful lands, beadwork and basketry.
(760) 629-4591, mojaveindiantribe.com

Fort Yuma-Quechan Tribe Yuma
Bordering Arizona, California and Mexico, these tribal lands include the picturesque Sunrise Point Park and the Yuma East Wetlands, both along the Colorado River. Purchase beautiful beadwork and other crafts by tribal members. Explore the tribe's history at the Fort Yuma-Quechan Museum, the Senior Center Gift Shop and the Cultural Center at Quechan Casino Resort.
(760) 572-0213, quechantribe.com

Hualapai Tribe Peach Springs
The Hualapai Tribe operates one-day whitewater rafting expeditions on the Colorado River, near the west rim of the Grand Canyon. See the Grand Canyon from sky, earth and water all in one day, or experience the Skywalk, curving out 4,000 feet above the canyon floor.
(928) 769-2636, grandcanyonwest.com

COMMUNITY INFORMATION

See page 100 for visitor information centers in Arizona's West Coast.

NATIONAL WILDLIFE REFUGES

For more information, visit fws.gov.
Bill Williams River Parker
(928) 667-4144

Cibola Cibola
(928) 857-3253

Havasu Needles, California
(760) 326-3853

Imperial Yuma
(928) 783-3371

Kofa Yuma
(928) 783-7861

PUBLIC LANDS

For public lands usage information, visit blm.gov/arizona.
Arizona State Land Department Phoenix
(602) 542-4631, land.az.gov

Grand Canyon–Parashant National Monument St. George, Utah
(435) 688-3200, nps.gov

La Paz County Parks Department Parker
(928) 667-2069, lapazcountyparks.com

Lake Mead National Recreation Area Boulder City, Nevada
(702) 293-8990, nps.gov

Mohave County Parks Department Kingman
(877) 757-0915, mcparks.com

Yuma Crossing National Heritage Area Yuma
(928) 373-5198, yumaheritage.com

STATE PARKS, GAME & FISH

Alamo Lake State Park Wenden
(928) 669-2088

Arizona Game and Fish Department Phoenix
(602) 942-3000, azgfd.gov

Arizona State Parks Phoenix
(602) 542-4174, azstateparks.com

Buckskin Mountain State Park Parker
(928) 667-3231

Cattail Cove State Park Lake Havasu City
(928) 855-1223

Lake Havasu State Park Lake Havasu City
(928) 855-2784

River Island State Park Parker
(928) 667-3386

Yuma Quartermaster Depot State Historic Park Yuma
(928) 783-0071

Yuma Territorial Prison State Historic Park Yuma
(928) 783-4771

Visit VisitArizona.com for additional recreation options.

EXPLORE ARIZONA'S WEST COAST

ATTRACTION

Black Canyon River Adventures Boulder City Lake Mead National Recreation Area, 268 Lakeshore Rd., (877) 386-4383 or (702) 294-1414, blackcanyonadventures.com
See up close a rare view of the Hoover Dam & Bypass Bridge. Relax and enjoy a scenic, narrated raft tour. Box lunch included.

Fisher's Landing Resort Martinez Lake 10882 N. Fisher's Landing Rd., (928) 782-7049, fisherslandingresort.com
An RV resort with hook-ups, Rio Loco Bar & Grill, country store, dump station and friendly folks. Eat, fish and off-road here!

Grand Canyon West Peach Springs P.O. Box 359, (888) 868-3978, grandcanyonwest.com
Walk the world famous Skywalk, enjoy a helicopter ride and dine in excellence with breathtaking views of the Grand Canyon.
See ad on page 87.

SYMBOL KEY

Electric vehicle charging station on-site
Pets allowed

Hualapai River Runners Peach Springs 900 Rt. 66, (888) 868-3978, grandcanyonwest.com
Experience the breathtaking views of the Grand Canyon while braving the rapids along the Colorado River. One- and two-day trips.

Temple Bar Marina Temple Bar 31409 N. Temple Bar, (800) 255-5561 or (928) 787-3211, templebarlakemead.com
Watercraft rentals for sightseeing excursions, watersports, fishing out on the lake. Ideal lakeside lodging, café and RV park.

Willow Beach Marina Willow Beach Lake Mead National Recreation Area, 25804 N. Willow Beach Rd., (928) 767-4747, willowbeachharbor.com
Easy access to Hoover Dam and Emerald Cave. Stay at the RV Park and enjoy the Colorado River by canoe, kayak or powerboat.

DESTINATION INFORMATION

Bullhead Area Chamber and Visitors Center Bullhead City 1251 AZ Hwy. 95, (800) 987-7457 or (928) 754-4121, bullheadareachamber.com
Desert oasis on the Colorado River and Lake Mohave: water activities, golf, off-roading, casino resorts, RV parks and hotels.

City of Kingman Visitor Center Kingman 120 W. Andy Devine Ave., (866) 427-7866 or (928) 753-6106, gokingman.com
Kingman, the heart of historic Route 66, is the gateway to Grand Canyon West, home of the Skywalk.
See ad on page 88.

Lake Havasu City CVB Lake Havasu City 422 English Village, (800) 242-8278 or (928) 453-3444, golakehavasu.com
Play like you mean it in Lake Havasu City—home of the famous London Bridge and known as Arizona's Playground.
See ad on page 89.

Parker Regional Chamber of Commerce & Tourism Parker 1217 S. California Ave., (928) 669-2174, parkeraz.org
Welcome to Parker. Explore the outdoors, boat the Colorado River and start your adventure. Visit the Parker area.
See ad on page 91.

Visit Yuma Yuma 201 N. Fourth Ave., (800) 293-0071 or (928) 783-0071, visityuma.com
Learn all there is to see and do in the world's sunniest city from our knowledgeable and friendly staff, and visit us online!
See ad on page 91.

DINING

Yuma Landing Bar & Grill Yuma 195 S. 4th Ave., (877) 234-5567 or (928) 783-4453, yumalanding.com ***AMERICAN***
A state monument in front of the restaurant marks the spot where the first plane landed in AZ. Restaurant walls are covered in old photos.

Accommodations

= AZLTA-Certified Green Lodging (see page 102)
= Electric vehicle charging station on-site
$ = $75 or less • $$ = $76–$150 • $$$ = $151–$250 • $$$$ = $251 or more

	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
ALL TYPES																		
Temple Bar Resort & Marina, Temple Bar (928) 767-3211 • templebarlakemead.com	22				•	•			•						•	•		$–$$
HOTEL																		
Best Western Yuma Mall, Yuma (928) 783-8341 • innsuites.com	166	•	•	•	•	•	•	•	•	•		•		•	•	•	•	$$
Choice Hotels, Region-wide (888) 846-9378 • choicehotels.com/arizona# • *see ad on page 1*			•					•	•	•		•			•	•	•	$–$$$$
RESORT																		
Coronado Motor Hotel, Yuma (877) 234-5567 • (928) 783-4453 • coronadomotorhotel.com	126		•	•	•	•	•	•	•	•		•			•	•	•	$–$$

RV Parks

	NUMBER OF SPACES	PARK MODELS FOR RENT	SENIOR ADULT PARK	PETS ALLOWED	LAUNDRY	SWIMMING POOL	ORGANIZED ACTIVITIES	INTERNET ACCESS	GOLF ON-SITE	TENNIS ON-SITE	RESTAURANT	EXERCISE FACILITIES	HOT TUB/JACUZZI	RECREATIONAL FACILITIES	ADA COMPLIANT
Arizona West RV Park, Yuma (928) 726-1481 • azwestrv.com	227		•	•	•	•	•	•					•	•	•
AZ Association of RV Parks & Campgrounds, Yuma arizonaarvc@aol.com • gocampinginarizona.com	1,000	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fisher's Landing Resort, Martinez Lake/Yuma (928) 782-7049 • fisherslandingresort.com	340			•	•		•	•			•				•
Fortuna de Oro RV Resort, Yuma (888) 940-8989 • (928) 342-5051 • cal-am.com/resorts	1,289		•	•	•	•	•	•	•	•	•	•	•	•	•
Sundance RV Resort,, Yuma (888) 940-8989 • (928) 342-9333 • cal-am.com/resorts	460		•	•	•	•	•	•		•		•	•	•	•
Temple Bar Marina RV Park, Temple Bar (928) 767-3211 • templebarlakemead.com	10			•	•						•			•	•
Willow Beach Campground & RV Park, Willow Beach (928) 767-4747 • willowbeachharbor.com	37			•	•			•			•			•	•





A Trivago top 10 emerging U.S. travel destination, Yuma is located on the sandy shores of the Colorado River in southwest Arizona. Venture into the great outdoors, relive the history of the Wild West, and enjoy uniquely Yuman experiences in the sunniest city on Earth.

Start planning your trip today at VisitYuma.com

Yuma ARIZONA

ARIZONA GRAND CANYON STATE

ExploreMoreAZ.com

NORTH CENTRAL ARIZONA

WITH ITS TEMPERATE CLIMATE AND CHARMING SMALL TOWNS, THIS REGION HAS MANY DELIGHTFUL ACTIVITIES YEAR-ROUND

BY ELENA ACOBA



SPIRITUAL GETAWAYS

Sedona is internationally renowned for its natural spiritual centers called vortexes, where in-tune visitors feel a concentration of metaphysical energy. Folks flock to the rust-red hills, buttes and formations to find these alternative sources of mental, physical and soulful healing. Guides can take you to them, and instructors can teach you how to harness their energy.

Even if Sedona's metaphysical mystique doesn't move you, you can still find spots that soothe your soul and relax your mind and body. Sedona is home to several luxury resort spas—some with golf courses, many with fine dining and all with magnificent views.

The abandoned **Verde River Hot Springs** resort outside Prescott is very popular for its old pools that still fill with warming water from nearby natural springs. Leisurely enjoy the lush and spectacular mountain scenery with a picnic or from a hot-air balloon ride in the Verde ("green" in Spanish) Valley.

Leaf-peeping is a popular fall pastime through **Oak Creek Canyon** and along the **Mogollon Rim.** The 7.5-mile **Red Rock Scenic Byway** takes you through the Village of Oak Creek and the area's distinctive red geologic formations.

If surrounding yourself with nature is what rejuvenates you, choose from a wide variety of outdoor activities in the cool **Prescott, Coconino** and **Tonto National Forests.** You can find camping, hiking, water activities and nature-watching opportunities in such special national forest spots as the **Verde River,** a federally designated Wild and Scenic River; **Mingus Mountain,** which looms over the Verde Valley and is popular with hang gliders; and the **Mogollon Rim,** a rugged, forested escarpment that marks the southern portion of the Colorado Plateau.

Boat, fish or kayak at **Watson Lake** in Prescott, or at **Roosevelt Lake,** behind the dam along the Salt River, where you can also swim and camp. For a structured hike with interpretive signs and many opportunities for quiet reflection, lace up

THE ROAD LESS TRAVELED

Venture off the main drag to explore some of these gems of the North Central Arizona region.

- Verde Valley Wine Trail, Yavapai County
- Downtown Cottonwood and Jerome
- Granite Dells, Prescott
- Montezuma Castle National Monument, Camp Verde
- Copper Art Museum, Clarkdale
- Jeep tours, hiking and biking, Sedona
- Verde Canyon Railroad, Clarkdale
- Blazin' M Ranch, Cottonwood
- Tonto Natural Bridge State Park, Pine
- Fossil Creek, Strawberry
- Tlaquepaque, Sedona
- Raft the upper Salt River, Gila County


ARIZONA OFFICE OF TOURISM


RON NIEBRUGGE


NICK BEREZENKO


ARIZONA OFFICE OF TOURISM/BEN OLSON


CHRISTOPHER FLORES

1 Biking in Sedona
2 Historic downtown Jerome
3 Arcosanti, Mayer
4 Watson Lake, Prescott
5 Tonto Natural Bridge, Payson

your shoes and hit the seven-mile trail at the **Granite Mountain Hotshots Memorial State Park** near Yarnell.

FAMILY TIME

Folks of all ages can take a breathtaking tour of the beautiful **Red Rock State Park** near Sedona. Featuring numerous trails that snake through the red sandstone canyon and along the Oak Creek, the views are second to none.

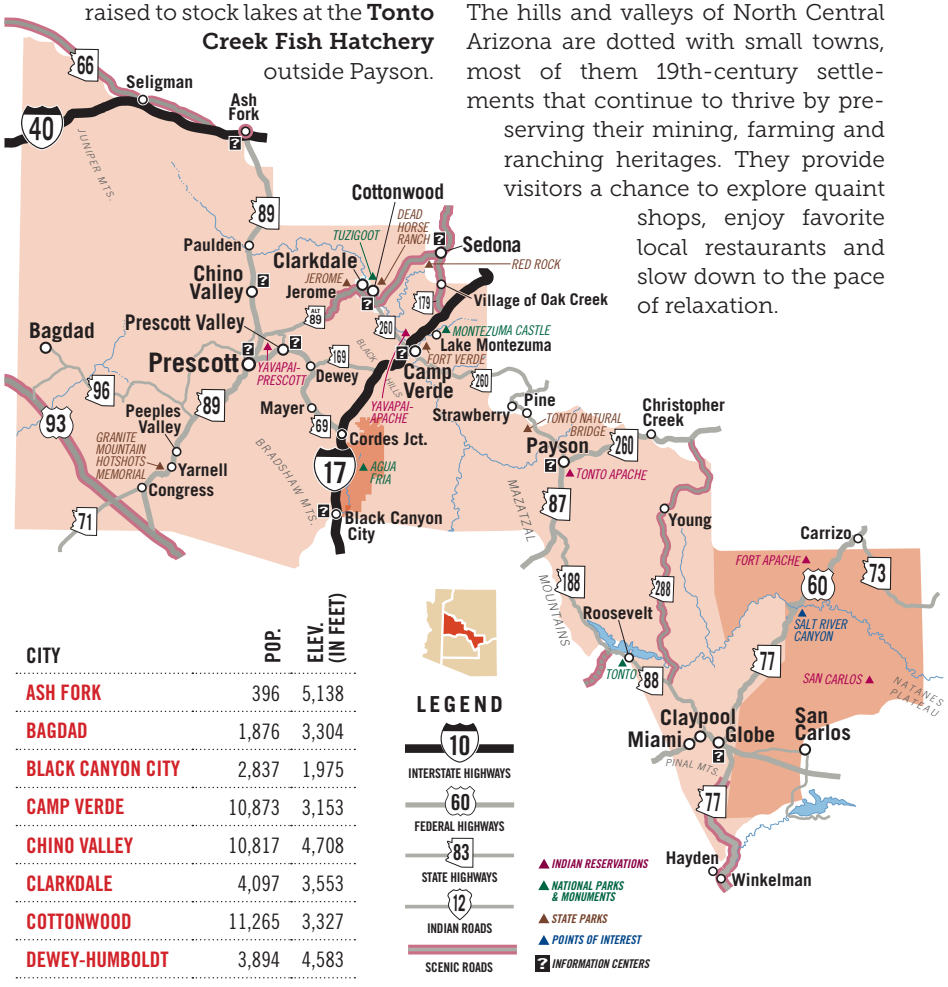
There are several compelling ways to interact with animals. Feed trout raised to stock lakes at the **Tonto Creek Fish Hatchery** outside Payson.

You can also feed a tiger or giraffe at **Out of Africa Wildlife Park** near Camp Verde. See the collection of exotic animals in trainer shows, from a truck tour among free-roaming animals or while sailing over the tiger habitat on a zip line.

The **Highlands Center for Natural History** in Prescott offers fun and educational programs for all ages so you and your family can learn about the ecosystem while having a good time.

SMALL-TOWN HIDEAWAYS

The hills and valleys of North Central Arizona are dotted with small towns, most of them 19th-century settlements that continue to thrive by preserving their mining, farming and ranching heritages. They provide visitors a chance to explore quaint shops, enjoy favorite local restaurants and slow down to the pace of relaxation.



CITY	POP.	ELEV. (IN FEET)
ASH FORK	396	5,138
BAGDAD	1,876	3,304
BLACK CANYON CITY	2,837	1,975
CAMP VERDE	10,873	3,153
CHINO VALLEY	10,817	4,708
CLARKDALE	4,097	3,553
COTTONWOOD	11,265	3,327
DEWEY-HUMBOLDT	3,894	4,583
GLOBE	7,532	3,510
HAYDEN	662	2,044
JEROME	444	5,066
MAYER	1,497	4,409
MIAMI	1,837	3,402
PAYSON	15,301	4,921
PEEPLES VALLEY	428	4,485
PINE	1,963	5,367
PRESCOTT	39,843	5,374
PRESCOTT VALLEY	38,822	5,026
RIMROCK	3,951	3,592
SAN CARLOS	4,038	2,628
SEDONA	10,031	4,350
SELIGMAN	445	5,253
STAR VALLEY	2,310	4,659
STRAWBERRY	961	5,889
WINKELMAN	353	1,968
YARNELL	649	4,777
YOUNG	666	5,187



Classic Boutique Historic

Just a short 90 minute drive north of Phoenix, located in the Historic District of Prescott – this hotel offers comforting small town charm while being closely situated near sights and sounds of Prescott. The prime location is walking ***distance to the Courthouse*** *Square, Art Galleries, Unique One of a Kind Shops, Eateries and Antique Stores.*

HASSAYAMPA Inn

122 E Gurley St.
Prescott, AZ 86301
www.hassayampainn.com
(800) 322-1927





Verde River, a federally designated Wild and Scenic River

NICK BEREZENKO

Stroll through the art galleries of Sedona, Jerome and Clarkdale or the antique shops of Camp Verde, Globe-Miami, Payson and Cottonwood for a special souvenir or gift. Tour **Arcosanti,** the experimental eco-village of architect Paolo Soleri, student of Frank Lloyd Wright. Here you can purchase one of the world-famous ceramic or metal windbells made by resident artists. The **Phippen Art Museum,** in Prescott, presents fine art with a Western theme.

History abounds in the region's contemporary and ancient communities. Get an introduction to the area's prehistoric cultures at the **Verde Valley Archaeology Center** in Camp Verde. Be sure to get information about the Sinagua Trail, a self-guided tour of nine sites that tells the story of these early people. Stops include rock-stacked pueblo ruins atop a Clarkdale hill at the **Tuzigoot National Monument.** Explore the museum and ruins at **Fort Apache Historic Park** to experience Apache history and culture.



Che Ah Chi, Sedona

MARK LYPCZYNSKI

Life of the Salado people is told with the cliff dwellings of **Tonto National Monument.** You can walk through the rooms, which are tucked into caves in the hills that overlook Roosevelt Lake. You also can walk among restored Salado ruins at **Besh-Ba-Gowah Archeological Park and Museum** in Globe.

Exhibits and artifacts in a copper-mine owner's family mansion make up **Jerome State Historic Park,** which builds a picture of the area's history as a mining boomtown. The **Sharlot Hall Museum** in Prescott uses restored historical buildings, exhibits and living history talks to



tell the story of Territorial Arizona. The **Fort Verde State Historic Park** preserves an American-Indian Wars-era military installation.

OUT & ABOUT

History extends to dining and entertainment venues. The elegant **Peacock Room,** at the Hassayampa Inn in Prescott, continues the 1920s Art Deco theme of the historical hotel. Nearby is **Whiskey Row,** a preserved block of buildings from the turn of the 20th century that is a center for dining, entertainment and shopping. While you're in the area, stop by **Superstition Meadery** for Arizona-produced mead, wine and hard cider.

The **Haunted Hamburger** in Jerome is in an old boarding house, and the owners swear it has a resident ghost.

Historic Old Town Cottonwood is the walkable commercial center of the community. Here you'll find popular **Nic's Italian Steak & Crab House.** Its New England clam chowder is a local favorite.

There's more to find in Cottonwood. Gather at **Rendezvous In Old Town** (R.I.O.T.) for local beer and wine, plus food, karaoke, and live and DJ-spun music.

Rock Springs Café, in Black Canyon City, started in 1918 as a traveler's outpost. Today it's popular for its pies and barbecue.

In Sedona, grab dinner at **Elote Cafe,** a restaurant inspired by the markets of Mexico, or dine in the industrial-chic interior of **The Hudson** for a change of scenery. Add a side of spectacular red-rock views to your fine dining at **Che-Ah-Chi Restaurant** at Sedona's Enchantment Resort.

Several casinos provide an all-in-one entertainment package of gaming, dining and music in very casual settings. Check out **Cliff Castle Casino Hotel** in Camp Verde, **Mazatzal Hotel & Casino** in Payson, **Bucky's** and **Yavapai casinos** in Prescott and **Apache Gold Casino Resort** in San Carlos. AZ

THE LOCAL WORD

Embark on your own Arizona adventure after reading about everyday experiences around the state—at VisitArizona.com under the Planning tab.

RESOURCE GUIDE

AMERICAN INDIAN TRIBES

San Carlos Apache Tribe San Carlos
Home to world-record elk hunts, the San Carlos Apache tribal lands are an ideal spot for fishing and hunting. Learn more about the tribe at the San Carlos Apache Cultural Center.
(928) 475-2894, sancarlosapache.com

Tonto Apache Tribe Payson
This small reservation is surrounded by gorgeous mountains: to the west, the Mazatzal Mountains; to the south, the Sierra Ancha Mountains; and to the north, the spectacular Mogollon Rim.
(928) 474-5000, (800) 777-PLAY, mazatzal-casino.com

Yavapai-Apache Nation Camp Verde
The community is conveniently located 90 miles north of Phoenix and home to the award-winning Distant Drums RV Resort and Cliff Castle Casino and Hotel, voted Arizona's Number 1 casino for more than a decade by *Ranking Arizona* magazine. Visit the Yavapai-Apache Nation's Cultural Department located at the gateway of the Montezuma Castle National Monument—1,300-year-old cliff dwellings bordering the Yavapai-Apache Nation tribal lands in Central Arizona.
(928) 649-6945, yavapai-apache.org

Yavapai-Prescott Indian Tribe Prescott
The Yavapai-Prescott Tribe offers a complete destination, including lodging, lively casinos and stunning mountain terrain. These tribal lands are an ideal spot for meetings or leisure travel with superb accommodations available at the 160-room, full-service Prescott Resort.
(928) 776-1666, (928) 227-2313, prescottresort.com

COMMUNITY INFORMATION

See page 100 for visitor information centers in North Central Arizona.

NATIONAL FORESTS

Coconino National Forest Flagstaff
(928) 527-3600, www.fs.usda.gov/coconino

Prescott National Forest Prescott
(928) 443-8000, www.fs.usda.gov/prescott

Tonto National Forest Phoenix
(602) 225-5200, www.fs.usda.gov/tonto

PUBLIC LANDS

For public lands usage information, visit blm.gov/arizona.

Agua Fria National Monument Phoenix
(623) 580-5500

Arizona State Land Department Phoenix
(602) 542-4631, land.az.gov

Montezuma Castle National Monument Camp Verde
(928) 567-3322, nps.gov/moca

Tonto National Monument Roosevelt
(928) 467-2241, nps.gov/tont

Tuzigoot National Monument Camp Verde
(928) 634-5564, nps.gov/tuzi

Yavapai County Facilities and Parks Department Prescott
(928) 771-3115, yavapai.us

STATE PARKS, GAME & FISH

Arizona Game and Fish Department Phoenix
(602) 942-3000, azgfd.gov

Arizona State Parks Phoenix
(602) 542-4174, azstateparks.com

Dead Horse Ranch State Park Cottonwood
(928) 634-5283

Fort Verde State Historic Park Camp Verde
(928) 567-3275

Granite Mountain Hotshots Memorial State Park Yarnell
(877) MYPARKS

Jerome State Historic Park Jerome
(928) 634-5381

Red Rock State Park Sedona
(928) 282-6907

Slide Rock State Park Sedona
(928) 282-3034

Tonto Natural Bridge State Park Payson
(928) 476-4202

Verde River Greenway State Natural Area Cottonwood
(928) 639-0312

Visit VisitArizona.com for additional recreation options.

EXPLORE NORTH CENTRAL ARIZONA

ATTRACTION

Alcantara Vineyards and Winery Cottonwood
3445 S. Grapevine Way, PO Box 64,
(928) 649-8463, alcantaravineyard.com
Alcantara Vineyards is a vineyard, winery and tasting room located along the Verde River. Come relax and taste Arizona wines.

Arcosanti/Cosanti Foundation Mayer 13555 S. Cross L Rd., (928) 632-7135, arcosanti.org
Arcosanti, architect Paolo Soleri's unique urban laboratory, offers tours, programs, guest rooms, a café and events all year.

Blazin' M Ranch Cottonwood 1875 Mabery Ranch Rd., (800) 937-8643 or (928) 634-0334, blazinm.com
Featuring barbecue chicken and ribs dinner and an hour-long Western stage production. Western activities, attractions and saloon.

Bucky's & Yavapai Casinos Prescott 1500 & 1505 E. Hwy. 69, (800) 756-8744 or (928) 778-7909, buckyscasino.com
Promotions and giveaways make this a favorite destination for winners to play. Shuttle service offered between properties.

Cliff Castle Casino Camp Verde 555 Middle Verde Rd., (800) 381-7568 or (928) 567-7900, cliffcastlecasinohotel.com
Cliff Castle Casino, the perfect place to play for the entire family with something for everyone. Food, fun and action await.
See ad on page 97.

Northern Light Balloon Expeditions Sedona 190 W. AZ Hwy. 89A, Box 1695, (800) 230-6222 or (928) 282-2274, northernlightballoon.com
Sunrise flights soaring over one of the most beautiful places in the world. Excellent safety record. FAA certified since 1973.

Out of Africa Wildlife Park Camp Verde
3505 W. AZ Hwy. 260, (928) 567-2840, outofafricapark.com
Safari tours, exciting shows, encounters, hands-on interaction, zip-line and more. Connect with wildlife like never before!

Sedona Offroad Adventures Sedona 320 N. AZ Hwy. 89A, (928) 282-6656, sedonajeeptours.com
Sedona's best 4x4 Hummer and Jeep tours. Sedona's most affordable tours. We treat you like family; come have fun with us.

BED AND BREAKFAST

A Sunset Chateau Sedona 665 Sunset Dr., (888) 988-3988 or (928) 282-2644, asunsetchateau.com
Experience panoramic views of Sedona's world famous Red Rocks from your suite, gourmet breakfasts and Wi-Fi included, from $249.

Briar Patch Inn Sedona 3190 N. AZ Hwy. 89A, (888) 809-3030 or (928) 282-2342, briarpatchinn.com
Briar Patch Inn, located in Oak Creek Canyon, features 19 cozy cabins on the lush banks of Oak Creek.

DESTINATION INFORMATION

Chino Valley Area Chamber of Commerce Chino Valley PO Box 419, (928) 636-2493, chinovalley.org
Chino Valley and the surrounding area, part of the Quad-Cities, is a center for agritourism, wine tasting and rich history.

Cottonwood Chamber of Commerce Cottonwood 849 Cove Pkwy, Ste. B & C., (928) 634-7593, cottonwoodchamberaz.org
Wine destination with historic district, Chocolate Walk, Thunder Valley Rally, Birding & Nature Fest and kayaking. Sip, shop, stay, play!
See ad on this page.

Jerome Chamber of Commerce Jerome 310 Hull Ave., (928) 634-2900, jeromechamber.com
Visit the mile-high town of Jerome and enjoy history, art, wine tasting, restaurants and bars, shopping and delightful lodging.

Prescott Tourism Office (Official Visitor Center) Prescott 117 W. Goodwin, (800) 266-7534 or (928) 445-2000, visit-prescott.com
True West. Real Adventure. Find history, western appeal, and an outdoor paradise waiting to be explored in Prescott.

Sedona Chamber of Commerce & Tourism Bureau and Official Visitor Center Sedona 331 Forest Rd., (800) 288-7336 or (928) 282-7722, visitsedona.com
Sedona is built for hiking, biking and land, air and water tours. You're never far from spas, dining, galleries and wineries.
See ad on page 95.

RESTAURANT

89Agave Cantina Sedona 254 N. AZ Hwy. 89A, (844) 254-4537 or (928) 282-7200, 89agave.com ***SOUTHWESTERN/REGIONAL***
Sonoran-style Mexican cuisine with fresh ingredients, served on a vibrant street-side patio or Mexican-inspired dining room.

SHOPPING

Tlaquepaque Arts and Crafts Village Sedona 336 AZ Hwy. 179, (928) 282-4838, tlaq.com
A landmark since the 1970s, enjoy an excellent collection of 50 shops and galleries bordered by five superb restaurants.

SYMBOL KEY

- Electric vehicle charging station on-site
- Pets allowed

SPA

Eforea Spa and Athletic Club Sedona 90 Ridge Trail Dr., (877) 273-3762 or (928) 284-6975, hiltonsedonaresort.com
Eforea will restore your body and your soul with unique treatments and services. Deluxe changing rooms, pool and steam rooms.

TOUR OPERATOR

Adventures Out West Sedona 441 Forest Rd., (800) 755-0935, azsegway.com
Sonoran Desert Off-Road Segway and Sedona Red Rock Country Segway Tours. Awesome local guides. Touring Arizona since 1995.

Great West Tours Sedona PO Box 2608, (877) 367-2383 or (928) 204-5506, greatwesttours.com
We provide one-day tours to the Grand Canyon, Hopi Reservation, Petrified Forest and other major sites in Northern Arizona.

Pink Jeep Tours Sedona 204 AZ Hwy. 89A, (800) 873-3662 or (928) 282-5000, pinkjeep.com
Since 1960, Pink Jeep Tours is known as the the premier, must-do tours in Sedona. Explore with us!

Sedona Air Tours Sedona 250 N. AZ Hwy. 89A, (888) 866-7433 or (928) 204-5939, sedonaairtours.com
Your premier Sedona and Grand Canyon air tour company. Daily departures by helicopter and plane. Charter tours available.





Accommodations

= AZLTA-Certified Green Lodging (see page 102)
= Electric vehicle charging station on-site
$ = $75 or less • $$ = $76–$150 • $$$ = $151–$250 • $$$$ = $251 or more

	NUMBER OF ROOMS	FREE AIRPORT TRANSPORTATION	FREE BREAKFAST	ROOM SERVICE	RESTAURANT	BAR/LOUNGE	CONCIERGE	WI-FI	LAUNDRY	SWIMMING POOL	FULL-SERVICE SPA	EXERCISE FACILITIES	GOLF ON-SITE	TENNIS ON-SITE	PETS ALLOWED	ADA COMPLIANT	SENIOR DISCOUNT	RATES
ALL TYPES																		
Red Agave Resort, Sedona (877) 284-9237 • (928) 284-9327 • redagaveresort.net	14							•	•	•					•			$$–$$$
CABINS																		
Briar Patch Inn, Sedona (888) 809-3030 • (928) 282-2342 • briarpatchinn.com	19		•	•			•	•			•					•		$$$$
HOTEL																		
A Sunset Chateau, Sedona (888) 988-3988 • (928) 282-2644 • asunsetchateau.com	25		•				•	•		•								$$$–$$$$
Best Western Plus Inn of Sedona, Sedona (800) 292-6344 • (928) 282-3072 • innofsedona.com	110		•				•	•	•	•		•			•	•	•	$$–$$$$
Choice Hotels, Region-wide (888) 846-9378 • choicehotels.com/arizona# • *see ad on page 1*			•					•	•	•		•			•	•	•	$–$$$$
Forest Villas Hotel, Prescott (800) 223-3449 • (928) 717-1200 • forestvillas.com	62		•			•	•	•	•	•		•			•	•	•	$$–$$$
Hassayampa Inn, Prescott (800) 322-1927 • (928) 778-9434 • hassayampainn.com • *see ad on page 94*	67			•	•	•		•	•			•			•	•	•	$$–$$$$
Jerome Grand Hotel, Jerome (888) 817-6788 • (928) 634-8200 • jeromegrandhotel.com	29		•		•	•		•									•	$$$
Orchards Inn, Sedona (800) 682-3181 • (928) 282-2405 • orchardsinn.com	70		•	•	•	•		•	•	•					•	•		$$$–$$$$
Quality Inn Prescott, Prescott (928) 776-1282 • qualityinn.com/hotel/az371	66		•					•		•					•	•	•	$$–$$$
Residence Inn by Marriott, Prescott (928) 775-2232 • marriott.com/PRCRI	92		•					•	•	•		•			•	•	•	$$–$$$$
Sedona Rouge Hotel & Spa, Sedona (866) 312-4111 • (928) 340-5301 • sedonarouge.com	103			•	•	•	•	•		•	•	•			•	•	•	$$$–$$$$
SpringHill Suites by Marriott, Prescott (928) 776-0998 • marriott.com/prcsh	105		•					•	•	•		•			•	•	•	$$–$$$$
RESORT																		
Arabella, Sedona (855) 795-8207 • (928) 282-7251 • arabellahotelsedona.com	145		•		•	•	•	•		•		•			•	•	•	$$–$$$$
Best Western Plus Arroyo Roble Hotel & Creekside Villas, Sedona (800) 773-3662 • (928) 282-4001 • bestwesternsedona.com	65		•					•	•	•		•		•	•	•	•	$$$–$$$$
Hilton Sedona Resort at Bell Rock, Sedona (877) 273-3762 • (928) 284-4040 • hiltonsedonaresort.com	219			•	•	•	•	•	•	•	•	•	•	•	•	•	•	$$$–$$$$
Junipine Resort, Sedona (800) 742-7463 • (928) 282-3375 • junipine.com	37				•	•	•	•	•							•		$$–$$$$
L'Auberge de Sedona, Sedona (855) 421-4461 • lauberge.com	88			•	•	•	•	•	•	•	•	•			•	•		$$$$
Poco Diablo Resort, Sedona (877) 282-5755 • (928) 282-7333 • pocodiablo.com	137			•	•	•	•	•	•	•	•	•	•	•	•	•	•	$$–$$$$
Prescott Resort & Conference Center, Prescott (855) 421-4297 • prescottresort.com	160			•	•	•	•	•	•	•	•	•				•	•	$$–$$$

RV Parks

	NUMBER OF SPACES	PARK MODELS FOR RENT	SENIOR ADULT PARK	PETS ALLOWED	LAUNDRY	SWIMMING POOL	ORGANIZED ACTIVITIES	INTERNET ACCESS	GOLF ON-SITE	TENNIS ON-SITE	RESTAURANT	EXERCISE FACILITIES	HOT TUB/JACUZZI	RECREATIONAL FACILITIES	ADA COMPLIANT
AZ Association of RV Parks & Campgrounds, Sedona arizonaarvc@aol.com • gocampinginarizona.com	500	•	•	•	•	•	•	•	•	•	•	•	•	•	•

Golf

PB = PUBLIC • SP = SEMI-PRIVATE

	NUMBER OF HOLES	PAR	YARDAGE	RATING	SLOPE	PUBLIC/ SEMI-PRIVATE	DRESS CODE	ADVANCED BOOKING POLICY	GOLF SHOP	BAR/LOUNGE	RESTAURANT
Poco Diablo Resort, Sedona (877) 282-5755 • (928) 282-7333 • pocodiablo.com	9	27	777			PB	•		•	•	•



ARIZONA VISITOR CENTERS

Find friendly staff and helpful information at these centers across the state

VISITOR INFORMATION CENTERS

PHOENIX & CENTRAL ARIZONA

Apache Junction Chamber of Commerce 567 W. Apache Trail, Apache Junction, 85120, (480) 982-3141, ajchamber.com

Buckeye Valley Chamber of Commerce 508 E. Monroe Ave., Buckeye, 85326, (623) 386-2727, buckeyevalleychamber.org

Coolidge Chamber of Commerce 351 N. Arizona Blvd., Ste. 5, Coolidge, 85128, (520) 723-3009, coolidgechamber.org

Florence Visitor Center at McFarland State Park 24 W. Ruggles St., Florence, 85132, (520) 868-5216, visitflorenceaz.com

Gila Bend Museum & Visitor Center 644 W. Pima St., Gila Bend, 85337, (928) 420-1964, gilabendazchamber.org

Glendale Visitor Center 5800 W. Glenn Dr., Ste. 140, Glendale, 85301, (877) 800-2601, (623) 930-4500, visitglendale.com

Greater Casa Grande Chamber of Commerce 575 N. Marshall St., Casa Grande, 85122, (800) 916-1515, casagrandechamber.org

Maricopa Chamber of Commerce 44480 W. Honeycutt Rd., Ste. 106, Maricopa, 85138, (520) 568-9573, maricopachamber.org

Oracle Visitors Center 1470 W. American Ave., Oracle, 85623, (520) 241-1142, visittricommunity.org

Peoria Chamber of Commerce 8385 W. Mariners Way, Ste. 3, Peoria, 85382, (623) 979-3601, peoriachamber.com

Phoenix Visitor Information Center 125 N. 2nd St., Ste. 120, Phoenix, 85004, (877) CALL-PHX, visitphoenix.com

Scottsdale Fashion Square 7014 E. Camelback Rd., Ste. 528, Scottsdale, 85251, (800) 782-1117, experiencescottsdale.com

Southwest Valley Chamber of Commerce 289 N. Litchfield Rd., Goodyear, 85338, (623) 932-2260, visitsouthwestvalley.com

Sun City West Visitors Center 13823 W. Camino del Sol, Sun City West, 85375, (800) 482-3798, suncitywest.org

Sunland Visitor Center 3725 N. Camelot St., Eloy, 85131, (888) 786-3007, (520) 466-3007, sunlandvisitorcenter.org

Superior Caboose Visitor Center 830 U.S. Hwy. 60, Superior, 85173, (520) 689-0200, superiorazchamber.net

Surprise Regional Chamber of Commerce 16126 N. Civic Center Plaza, Surprise, 85374, (623) 583-0692, visitsurpriseaz.com

Tempe Arizona Mills Mall Kiosk 5000 S. Arizona Mills Circle, Tempe, 85282, (480) 491-9700, arizonamills.com

Tempe Tourism Office 222 S. Mill Ave., Ste. 120, Tempe, 85281, (800) 283-6734, (480) 894-8158, tempetourism.com

Visit Mesa Information Center 120 N. Center St., Mesa, 85201, (800) 283-6372, (480) 827-4700, visitmesa.com

Wickenburg Chamber of Commerce 216 N. Frontier St., Wickenburg, 85390, (928) 684-5479, outwickenburgway.com

TUCSON & SOUTHERN ARIZONA

Ajo Chamber of Commerce 1 W. Plaza St., Ajo, 85321, (520) 387-7742, ajochamber.com

Asarco Mineral Discovery Center 1421 W. Pima Mine Rd., Sahuarita, 85629, (520) 625-7513, mineraldiscovery.com

Benson Visitor Center 249 E. 4th St., Benson, 85602, (520) 586-4293, bensonvisitorcenter.com

Bisbee Visitor Center Queen Mine Tour Building, 478 Dart Rd., Bisbee, 85603, (520) 432-3554, discoverbisbee.com

City of Douglas Visitor Center 345 16th St., Douglas, 85607, (520) 417-7344, visitdouglas.com

Clifton Visitor Center Old Train Depot, 100 N. Coronado Blvd., Clifton, 85533, (928) 865-3313, visitcliftonaz.com

Graham County Chamber of Commerce 1111 Thatcher Blvd. (Hwy. 70), Safford, 85546, (888) 837-1841, graham-chamber.com

Green Valley/Sahuarita Chamber of Commerce 275 W. Continental Rd., Ste. 123, Green Valley, 85622, (800) 858-5872, (520) 625-7575, greenvalleysahuarita.com

Marana Chamber of Commerce 13881 N. Casa Grande Hwy., Marana, 85653, (520) 639-8090, discovermarana.org

Nogales-Santa Cruz County Chamber of Commerce 123 W. Kino Park Place, Nogales, 85621, (520) 287-3685, thenogaleschamber.org

Patagonia Visitor Center 299 McKeown Ave., Patagonia, 85624, (520) 394-0067, patagoniaaz.com

Sierra Vista Visitors Bureau 3020 E. Tacoma St., Sierra Vista, 85635, (520) 417-6960, visitsierravista.com

Tombstone Chamber of Commerce 395 E. Allen St., Tombstone, 85638, (888) 457-3929, (520) 457-9317, tombstonechamber.com

Tubac Presidio State Historic Park 1 Burruel St., Tubac, 85646, (520) 398-2252, tubacpp.com

Tucson Visitor Center 811 N. Euclid Ave., Tucson, 85719, (800) 638-8350, (520) 624-1817, visittucson.org

Willcox Chamber of Commerce & Agriculture 1500 N. Circle I Rd., Willcox, 85643, (520) 384-2272, willcoxchamber.com

NORTHERN ARIZONA

Flagstaff Visitor Center 1 E. Route 66, Flagstaff, 86001, (800) 842-7293, (928) 213-2951, flagstaffarizona.org

Grand Canyon Chamber & Visitors Bureau 469 AZ Hwy. 64, Grand Canyon, 86023, (844) 638-2901, (928) 638-2901, grandcanyoncvb.org

Holbrook Chamber of Commerce Historic Courthouse, 100 E. Arizona St., Holbrook, 86025, (928) 524-6558, holbrookazchamber.com

Lake Powell Museum 6 N. Lake Powell Blvd., Page, 86040, (928) 645-9496, powellmuseum.org

Pinetop-Lakeside Chamber of Commerce 518 W. White Mountain Blvd., Lakeside, 85929, (928) 367-4290, pinetoplakesidechamber.com

Show Low Chamber of Commerce 81 E. Deuce of Clubs, Show Low, 85901, (928) 537-2326, showlowchamber.com

Snowflake-Taylor Chamber of Commerce 113 N. Main St., Ste. A, Snowflake, 85937, (928) 536-4331, snowflaketaylorchamber.org

Springerville-Eagar Regional Chamber of Commerce 7 W. Main St., Springerville, 85938, (928) 333-2123, springerville-eagarchamber.com

Valle–Planes of Fame Visitor Center 755 Mustang Way, Valle-Williams, 86046, (928) 635-1000, planesoffame.org

The White Mountain Apache Cultural Center and Museum–Nohwike' Bágowa 127 Scout St., Fort Apache, 85926, (928) 338-4625, fortapachearizona.org

Williams Visitor Center 200 W. Railroad Ave., Williams, 86046, (928) 635-4061, experiencewilliams.com

Winslow Chamber of Commerce and Visitor's Center 523 W. 2nd St., Winslow, 86047, (928) 289-2434, winslowarizona.org

ARIZONA'S WEST COAST

Bullhead Area Chamber of Commerce 1251 Hwy. 95, Bullhead City, 86429, (928) 754-4121, bullheadareachamber.com

Chloride Chamber of Commerce 4940B Tennessee Ave., Chloride, 86431, (928) 565-2209

Kingman Visitor Center 120 W. Andy Devine Ave. (Rte. 66), Kingman, 86401, (866) 427-7866, (928) 753-6106, gokingman.com

Lake Havasu City Convention and Visitors Bureau 314 London Bridge Rd., Lake Havasu City, 86403, (800) 242-8278, (928) 453-3444, golakehavasu.com

Parker Area Chamber of Commerce 1217 S. California Ave., Parker, 85344, (928) 669-2174, parkeraz.org

Yuma Visitor Information Center Yuma Quartermaster Depot State Historic Park, 201 N. 4th Ave., Yuma, 85364, (800) 293-0071, (928) 783-0071, visityuma.com

NORTH CENTRAL ARIZONA

Ash Fork Tourist Information Center 901 W. Old Route 66, Ash Fork, 86320, (928) 637-0204, ashforkrt66museum.com

Black Canyon City Chamber of Commerce and Visitor Center 33955 S. Old Black Canyon Hwy., Black Canyon City, 85324, (623) 374-9797, blackcanyonaz.com

Camp Verde Visitors Center 435 S. Main St., Camp Verde, 86322, (928) 554-0851, visitcampverde.com

Chino Valley Area Chamber of Commerce 175 E. Road 2 S., Chino Valley, 86323, (928) 636-2493, chinovalley.org

Cordes Junction High Desert Heritage Museum and Visitor Center 19600 E. Stagecoach Trail, Cordes Junction, 86333, (928) 632-4633

Cottonwood Chamber of Commerce 849 Cove Parkway, Cottonwood, 86326, (928) 634-7593, cottonwoodchamberaz.org

Globe-Miami Regional Chamber of Commerce 1360 N. Broad St., Globe, 85501, (800) 804-5623, (928) 425-4495, globemiamichamber.com

Prescott Chamber of Commerce 117 W. Goodwin St., Prescott, 86303, (800) 266-7534, (928) 445-2000, prescott.org

Prescott Valley Chamber of Commerce 7120 E. Pav Way, Ste. 102, Prescott Valley, 86314, (928) 772-8857, pvchamber.org

Rim Country Regional Chamber of Commerce and Visitor Center 100 W. Main St., Payson, 85547, (928) 474-4515, rimcountrychamber.com

Sedona Chamber of Commerce & Tourism Bureau Visitor Information Center 331 Forest Rd., Sedona, 86336, (800) 288-7336, (928) 282-7722, visitsedona.com

SMART TRAVELER

Tips to help you get the most from your stay

It's easy to enjoy Arizona's year-round temperate climate and unparalleled natural beauty. With the following collection of resources, you'll discover it's just as easy to access every corner of the Grand Canyon State.

Don't see what you're looking for? You'll find further information in the "Arizona Visitor Centers" section of this guide, as well as at the end of each regional section. For even more resources, see **VisitArizona.com.**

GETTING HERE

TRAVELING BY AIR

Arizona's airports make it easy to reach your destination. For airline and flight information, contact each airport individually. For additional airports in the state, go to VisitArizona.com.

Flagstaff Pulliam Airport (928) 556-1234

Grand Canyon National Park Airport
(928) 638-2446,
azdot.gov

Phoenix Sky Harbor International Airport
(602) 273-3300, skyharbor.com

Phoenix-Mesa Gateway Airport
(480) 988-7600, gatewayairport.org

Tucson International Airport
(520) 573-8100, flytucson.com

Yuma International Airport
(928) 726-5882,
yumaairport.com

TRAVELING BY RAIL OR BUS

With stops in the major metropolitan areas, as well as in many other destinations around the state, trains and buses are viable options for traveling around the Grand Canyon State. Check websites for complete station lists.

Amtrak Passenger Rail (800) USA-RAIL, amtrak.com

Greyhound Intercity Bus Lines
(800) 231-2222, greyhound.com

LOCAL TRANSPORTATION

BUS & LIGHT-RAIL SERVICE

In the Greater Phoenix area, Valley Metro Light Rail provides speedy rail service from Central Phoenix, through downtown Phoenix and Tempe's Arizona State University campus and into Mesa. The convenient PHX Sky Train connection delivers riders right to Phoenix Sky Harbor International Airport.

Valley Metro buses provide public transportation throughout the entire Greater Phoenix area.

Sun Tran buses serve the metro Tucson area and have transit centers located at major destinations throughout the city.

Valley Metro (602) 253-5000,
valleymetro.org

Sun Tran (520) 792-9222, suntran.com

SHUTTLE SERVICE

No matter where your destination is in Arizona, ground transportation is easily accessible. Visit the websites of Phoenix Sky Harbor International Airport (skyharbor.com), Tucson International Airport (flytucson.com) and Phoenix-Mesa Gateway Airport (gatewayairport.org) for companies currently offering shuttle service between airports and cities throughout the state.

CAR RENTAL

National car rental companies offer service at both the Phoenix and Tucson airports. At Phoenix Sky Harbor International Airport, shuttles ferry passengers to a separate, state-of-the-art car rental complex.

ADVANTAGE	(800) 777-5500*	FOX	(855) 571-8410*
ALAMO	(800) 462-5266	HERTZ	(800) 654-3131
AVIS	(800) 331-1212	NATIONAL	(877) 222-9058
BUDGET	(800) 527-7000	PAYLESS	(800) 729-5377*
DOLLAR	(800) 800-4000	SILVERCAR	(602) 346-9080*
ENTERPRISE	(800) 736-8222	SIXT	(888) 749-8227*
FIREFLY	(888) 296-9135*	THRIFTY	(800) 847-4389

**Indicates car rental service not on location at Tucson International Airport.*

For additional ground transportation information for the airports, visit the airport websites.

DIGITAL RESOURCES
FOR ARIZONA TRAVELERS

VISITARIZONA.COM

The official website of the Arizona Office of Tourism offers comprehensive information about the Grand Canyon State, including travel ideas, a calendar of events, maps, and hotel and attraction listings, as well as travel deals and special offers.

Need inspiration for your Arizona getaway? Head to VisitArizona.com to fine-tune your perfect trip. TripTuner allows you to plug in your preferences, from Arizona favorites to hidden gems, modern to ancient attractions or even relaxing to active getaways. Discover which Arizona adventure suits you best.

VISITARIZONA.COM/PLANNING/ELECTRIC-CARS

The official guide designed for electric vehicle travelers in Arizona provides many resources, including downloadable itineraries, a lodging directory and an interactive charging map.

BRETTAPPROVED.COM

A travel website for people with physical disabilities or mobility challenges, brettapproved.com celebrates accessible hotels, restaurants and entertainment venues by providing accessibility-focused information and user-generated reviews designed to help anyone who visits the site travel confidently.

YOUR ONLINE GUIDE

Not unlike this travel guide, the official Visit Arizona mobile app is packed with info about things to do in Arizona. Only the app is smarter—it can give you recommendations based on your location and personal preferences. And it can help you get there. Download the Visit Arizona app today in the Apple App Store or Google Play Store. It's free!

STAY **GREEN**

Finding environmentally friendly lodging in Arizona just became a lot easier. The Arizona Lodging & Tourism Association, in partnership with the Arizona Department of Environmental Quality and the Arizona Office of Tourism, has developed the Arizona Certified Green Lodging Program.

To earn this certification, hotels and resorts must acquire a qualifying number of points in 15 categories of green practices. At the time of this printing, the following properties had obtained the certification:

- **Arizona Biltmore Resort & Spa** Phoenix
- **Arizona Grand Resort** Phoenix
- **Arroyo Pinion Hotel** Sedona
- **AZ Pines Motel** Cottonwood
- **Best Western Plus Inn of Sedona** Sedona
- **Best Western Phoenix I-17 Metrocenter Inn** Phoenix
- **Best Western Plus Gold Poppy Inn** Tucson
- **Best Western Plus Sundial** Scottsdale
- **Best Western Royal Sun Inn & Suites** Tucson
- **Best Western Sonora Inn & Suites** Nogales
- **Best Western Sunrise Inn** Eagar
- **Casino Del Sol Resort** Tucson
- **Enchantment Resort** Sedona
- **Fairmont Scottsdale Princess** Scottsdale
- **Grand Canyon National Park Lodges** Grand Canyon
- **Grand Canyon Railway & Resort** Williams
- **The Grand Hotel** Grand Canyon
- **Hilton Tucson El Conquistador Golf & Tennis Resort** Tucson
- **Hotel Valley Ho** Scottsdale
- **Hyatt Place Scottsdale Old Town** Scottsdale
- **Loews Ventana Canyon Resort** Tucson
- **London Bridge Resort** Lake Havasu City
- **Mesa Mezona Hotel** Mesa
- **Omni Scottsdale Resort & Spa at Montelucia** Scottsdale
- **The Phoenician** Scottsdale
- **Pointe Hilton Squaw Peak Resort** Phoenix
- **Pointe Hilton Tapatio Cliffs Resort** Phoenix
- **Radisson Hotel Phoenix–Chandler** Chandler
- **Residence Inn Marriott** Prescott
- **The Ritz-Carlton, Dove Mountain** Marana
- **Royal Palms Resort and Spa** Phoenix
- **Scottsdale Camelback Resort** Scottsdale
- **Scottsdale Resort at McCormick Ranch** Scottsdale
- **Sedona Rouge Hotel & Spa** Sedona
- **Sheraton Grand Phoenix** Phoenix
- **SpringHill Suites Prescott** Prescott
- **Tempe Mission Palms** Tempe
- **Tubac Golf Resort & Spa** Tubac
- **The Westin Kierland Resort & Spa** Scottsdale
- **The Westin La Paloma Resort & Spa** Tucson
- **Westward Look Wyndham Grand Resort & Spa** Tucson

The icon indicates lodgings with on-site electric vehicle charging stations. Look for the icon in the accommodations listings in this guide, or visit stayinaz.com/certified-green-hotels.html for more information on the program.

511 TRAVELER INFORMATION SERVICE

The Arizona Department of Transportation's 511 Traveler Information Service provides information and updates on road closures, construction and delays, as well as public transit services, major airports, tourism, weather and more.

511 Traveler Information Service dial 511, az511.gov, Twitter @ArizonaDOT

TIMING YOUR VISIT

During any season in Arizona, some part of the state enjoys ideal weather.

Generally, the "peak" or busiest season in the desert areas (southern half of the state) lasts from January–March; the next most popular "shoulder" seasons are from April–May and September–December. The season when visitors can find the greatest values is from June–August.

Peak and value seasons in the mountainous regions (in the northern half of the state) are the opposite of those in the desert areas. Generally, peak season is from June to August, and value season is from January to March.

Peak season in some midclimate areas of the state, such as Sedona, is from March to May and September to October, with shoulder season running January to February. (See the weather chart on the next page.)

AMERICAN INDIAN LANDS

The 22 American Indian tribes in Arizona offer a multitude of recreational attractions, casinos and scenery that make their tribal lands—covering about 25% of the state—highly sought-after destinations and vacation spots. From ski slopes to blue waters and narrow canyons to slender spires, American Indian lands in Arizona are more than ready to entertain and delight visitors.

You can learn more and find contact information for each tribe in the regional sections of this guide. For tribal land etiquette tips and additional information, see VisitArizona.com.

INTERNATIONAL TRAVELERS

Foreign travelers are required to present a visa and passport from their country of origin in order to enter the U.S. For additional information, please contact the U.S. State Department.

U.S. State Department–Visa Services (877) 487-2778, travel.state.gov

TIME ZONE

Arizona is in the Mountain Standard time zone. With the exception of the Navajo Indian Reservation in Northern Arizona, the state does not observe daylight saving time.

BUCKLE UP!

All passengers under the age of 16 are required to wear a seatbelt. Children younger than eight years old must be properly secured in a child restraint device. Once a child is taller than 4 feet 9 inches, or is eight years old, he or she may use a regular seatbelt.

SMART RESOURCES

NATURE & ADVENTURE

Arizona American Indian Tribes
VisitArizona.com/uniquely-az/american-indian-tribes

Arizona Bureau of Land Management Information Center (602) 417-9200, blm.gov/arizona

Arizona Game and Fish Department (602) 942-3000, azgfd.gov

Arizona Geological Survey (520) 621-2470, azgs.az.gov

Arizona State Land Department (602) 542-4631, land.az.gov

Arizona State Parks (602) 542-4174, azstateparks.com

Arizona Trail Association (602) 252-4794, aztrail.org

National Park Service (602) 794-3804, nps.gov

U.S. Fish and Wildlife Service (505) 248-6911, fws.gov/southwest

USDA Forest Service Southwestern Region (505) 842-3292, fs.fed.us/r3

LODGING & DINING

Arizona Association for RV Parks and Campgrounds (602) 403-6196, gocampinginarizona.com

Arizona Association of Bed & Breakfast Inns (928) 425-2260, arizona-bed-breakfast.com

Arizona Farmers Markets arizonacommunityfarmersmarkets.com

Arizona Lodging & Tourism Association (602) 604-0729, azlta.com

Arizona Restaurant Association (602) 307-9134, azrestaurant.org

Arizona Wine Growers Association (520) 261-4421, arizonawine.org

Arizona Winter Visitors Association arizonawintervisitors.com

Local First Arizona (602) 956-0909, localfirstaz.com

Southern Arizona Lodging & Resort Association (520) 207-9931, salara.org

All information contained in the Smart Traveler pages is current at time of printing. The Arizona Office of Tourism does not necessarily recommend or endorse the companies or services that appear herein.

ARIZONA WEATHER

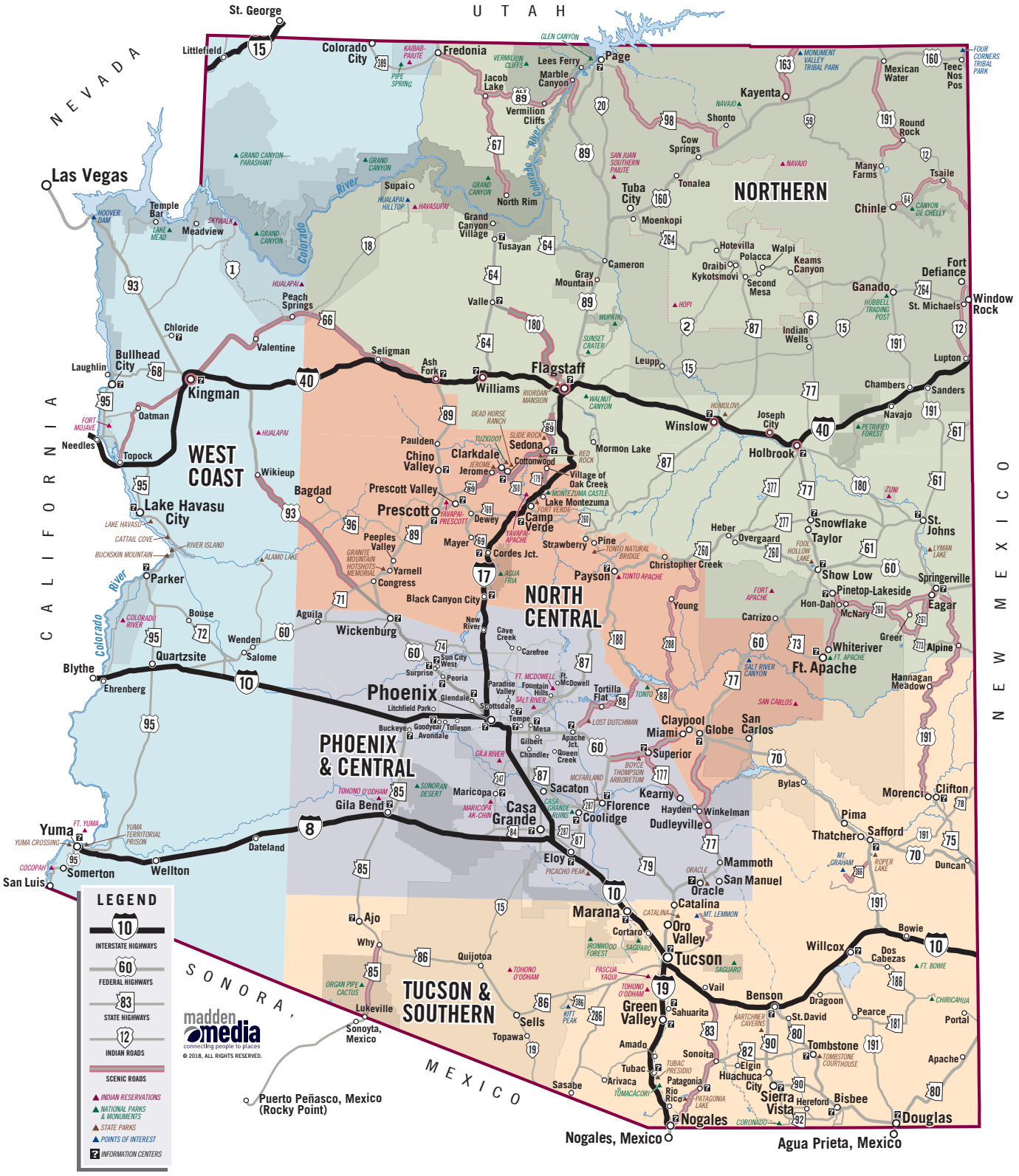
MOUNTAIN	AVERAGE HIGH (°F/°C)	AVERAGE LOW (°F/°C)	AVERAGE RAINFALL (IN INCHES)
JANUARY	43/6	16/-9	2.18
FEBRUARY	46/8	19/-7	2.56
MARCH	50/10	23/-5	2.62
APRIL	58/14	27/-3	1.29
MAY	68/20	34/1	0.80
JUNE	79/26	41/5	0.43
JULY	82/28	50/10	2.40
AUGUST	80/27	49/9	2.89
SEPTEMBER	74/23	42/6	2.12
OCTOBER	63/17	31/-1	1.93
NOVEMBER	51/11	22/-6	1.86
DECEMBER	44/7	17/-8	1.83

DESERT	AVERAGE HIGH (°F/°C)	AVERAGE LOW (°F/°C)	AVERAGE RAINFALL (IN INCHES)
JANUARY	66/19	39/4	0.92
FEBRUARY	72/22	42/6	0.93
MARCH	77/25	46/8	1.25
APRIL	85/29	51/11	0.29
MAY	92/33	58/14	0.20
JUNE	101/38	66/19	0.90
JULY	102/39	74/23	0.90
AUGUST	101/38	74/23	1.01
SEPTEMBER	97/36	67/19	0.82
OCTOBER	87/31	56/13	0.85
NOVEMBER	74/23	44/7	0.76
DECEMBER	66/19	39/4	0.93

MILEAGE CHART

	PHOENIX	TUCSON	PRESCOTT	LAKE HAVASU CITY	YUMA	FLAGSTAFF	SIERRA VISTA	SHOW LOW	GRAND CANYON
PHOENIX *elev. 1,086'*	—	116	100	194	184	147	188	180	229
TUCSON *elev. 2,490'*	116	—	216	309	240	262	74	194	343
PRESCOTT *elev. 5,374'*	100	216	—	207	216	97	288	186	128
LAKE HAVASU CITY *elev. 738'*	194	309	207	—	155	210	381	343	232
YUMA *elev. 141'*	184	240	216	155	—	323	312	347	404
FLAGSTAFF *elev. 6,903'*	147	262	97	210	323	—	334	137	79
SIERRA VISTA *elev. 4,623'*	188	74	288	381	312	334	—	265	415
SHOW LOW *elev. 6,332'*	180	194	186	343	347	137	265	—	224
GRAND CANYON *elev. 6,886'*	229	343	128	232	404	79	415	224	—

ARIZONA
STATE MAP


UTAH
NEVADA
CALIFORNIA
NEW MEXICO
SONORA, MEXICO
St. George
Littlefield
Colorado City
Fredonia
Page
Lees Ferry
Marble Canyon
Jacob Lake
Vermilion Cliffs
Kayenta
Shonto
Mexican Water
Teec Nos Pos
Round Rock
Cow Springs
Tonalea
Tuba City
Moenkopi
Many Farms
Tsaile
Chinle
NORTHERN
Las Vegas
Temple Bar
Meadview
Supai
North Rim
Grand Canyon Village
Tusayan
Cameron
Hotevilla
Walpi
Polacca
Keams Canyon
Oraibi
Kykotsmovi
Second Mesa
Gray Mountain
Valle
Peach Springs
Chloride
Valentine
Seligman
Ash Fork
Flagstaff
Williams
Leupp
Ganado
Fort Defiance
Window Rock
St. Michaels
Indian Wells
Lupton
Chambers
Sanders
Navajo
Joseph City
Winslow
Holbrook
Petrified Forest
Laughlin
Bullhead City
Kingman
Oatman
Needles
Topock
WEST COAST
Wikieup
Bagdad
Lake Havasu City
Parker
Peeples Valley
Prescott Valley
Prescott
Dewey
Mayer
Cordes Jct.
Yarnell
Congress
Black Canyon City
Paulden
Chino Valley
Clarkdale
Jerome
Cottonwood
Sedona
Mormon Lake
Village of Oak Creek
Lake Montezuma
Camp Verde
Strawberry
Pine
Payson
Christopher Creek
Heber
Overgaard
Snowflake
Taylor
Show Low
Pinetop-Lakeside
Hon-Dah
McNary
Eagar
Springerville
St. Johns
Alpine
Greer
Whiteriver
Ft. Apache
Carrizo
Young
NORTH CENTRAL
Aguila
Wickenburg
New River
Cave Creek
Carefree
Sun City West
Surprise
Peoria
Glendale
Litchfield Park
Goodyear
Tolleson
Avondale
Buckeye
Bouse
Wenden
Salome
Quartzsite
Blythe
Ehrenberg
Phoenix
Paradise Valley
Fountain Hills
Scottsdale
Tempe
Mesa
Gilbert
Chandler
Apache Jct.
Queen Creek
Tortilla Flat
Claypool
Miami
Globe
San Carlos
Superior
Hannagan Meadow
PHOENIX & CENTRAL
Maricopa
Casa Grande
Sacaton
Florence
Coolidge
Kearny
Hayden
Winkelman
Dudleyville
Bylas
Morenci
Clifton
Pima
Thatcher
Safford
Duncan
Mammoth
San Manuel
Oracle
Catalina
Marana
Oro Valley
Tucson
Ajo
Why
Quijotoa
Gila Bend
Yuma
Dateland
Somerton
Wellton
San Luis
Lukeville
Sonoyta, Mexico
TUCSON & SOUTHERN
Sells
Topawa
Green Valley
Sahuarita
Amado
Sonoita
Tubac
Arivaca
Sasabe
Nogales
Nogales, Mexico
Puerto Peñasco, Mexico (Rocky Point)
Eloy
Picacho Peak
Willcox
Bowie
Dos Cabezas
Benson
Dragoon
St. David
Pearce
Portal
Tombstone
Apache
Elgin
Huachuca City
Sierra Vista
Hereford
Bisbee
Douglas
Agua Prieta, Mexico
Vail
Colorado River
Grand Canyon
Hoover Dam
Lake Mead
Lake Havasu
Cattail Cove
Buckskin Mountain
River Island
Alamo Lake
Yuma Crossing
Yuma Territorial Prison
Cocopah
Fort Yuma
Fort Mojave
Skywalk
Hualapai
Havasupai
Pipe Spring
Kaibab-Paiute
Vermilion Cliffs
Glen Canyon
San Juan Southern Paiute
Navajo
Hopi
Monument Valley Tribal Park
Four Corners Tribal Park
Canyon de Chelly
Hubbell Trading Post
Wupatki
Sunset Crater
Walnut Canyon
Riordan Mansion
Homolovi
Dead Horse Ranch
Tuzigoot
Slide Rock
Red Rock
Montezuma Castle
Tonto
Yavapai-Prescott
Yavapai-Apache
Granite Mountain Hotshots Memorial
Agua Fria
Tonto Natural Bridge
Tonto Apache
Fort Apache
Salt River Canyon
Zuni
Fool Hollow Lake
Lyman Lake
San Carlos
Lost Dutchman
Gila River
Tohono O'odham
Sonoran Desert
Ironwood Forest
Saguaro
Pascua Yaqui
Organ Pipe Cactus
Kitt Peak
Picacho Peak
Mt. Graham
Roper Lake
Mt. Lemmon
Chiricahua
Kartchner Caverns
Tombstone Courthouse
Tubac Presidio
Tumacácori
Patagonia Lake
Coronado
Fort Bowie
Mt. Graham
Bonita Creek
McFarland
Casa Grande Ruins
Maricopa AK-CHIN
Hualapai Hilltop
Grand Canyon Parashant
Grand Canyon
Havasupai
Hualapai
Navajo
Hopi
San Juan Southern Paiute
Tohono O'odham
Apache
Yavapai-Apache
Yavapai-Prescott
Tonto Apache
Fort Apache
Tohono O'odham
Pascua Yaqui
Tumacácori
Tubac Presidio
Tombstone Courthouse
Kartchner Caverns
Chiricahua
Fort Bowie
Mt. Graham
Mt. Lemmon
Ironwood Forest
Saguaro
Organ Pipe Cactus
Kitt Peak
Picacho Peak
Roper Lake

EXPEDITION FOODIE

ARIZONA

TAKE YOUR TASTE BUDS ON AN ADVENTURE.

Hungry for something different? Expedition Foodie AZ is a new website that helps you discover only-in-Arizona restaurants, bars, cafés and eateries.

Tell us what you're looking for and we'll serve up a selection of our favorite spots.



Start your foodie adventure at

ExpeditionFoodieAZ.com

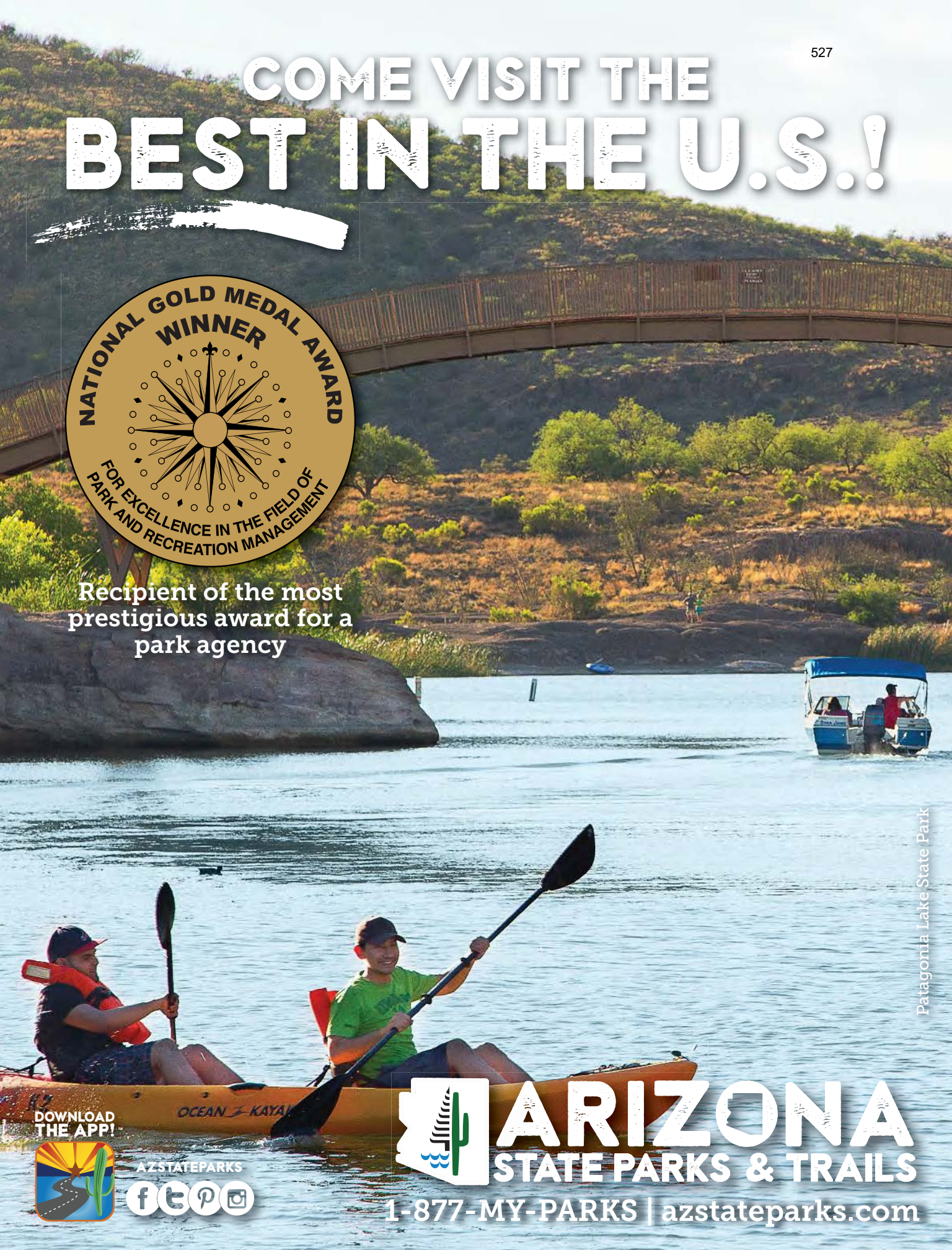
ARIZONA

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