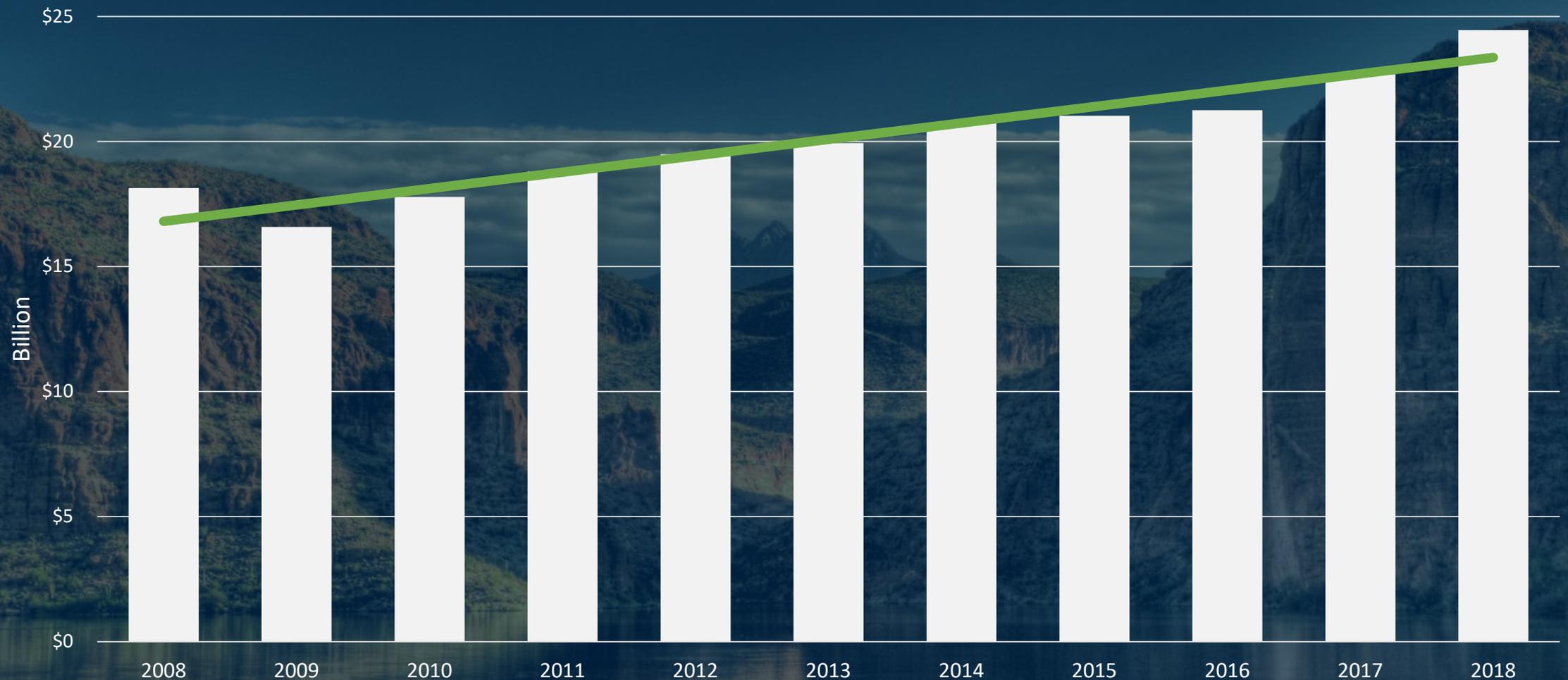


ARIZONA
OFFICE OF TOURISM

Industry Update
2019

Direct Travel Spending





DIRECT TRAVEL SPENDING
GENERATED IN 2018



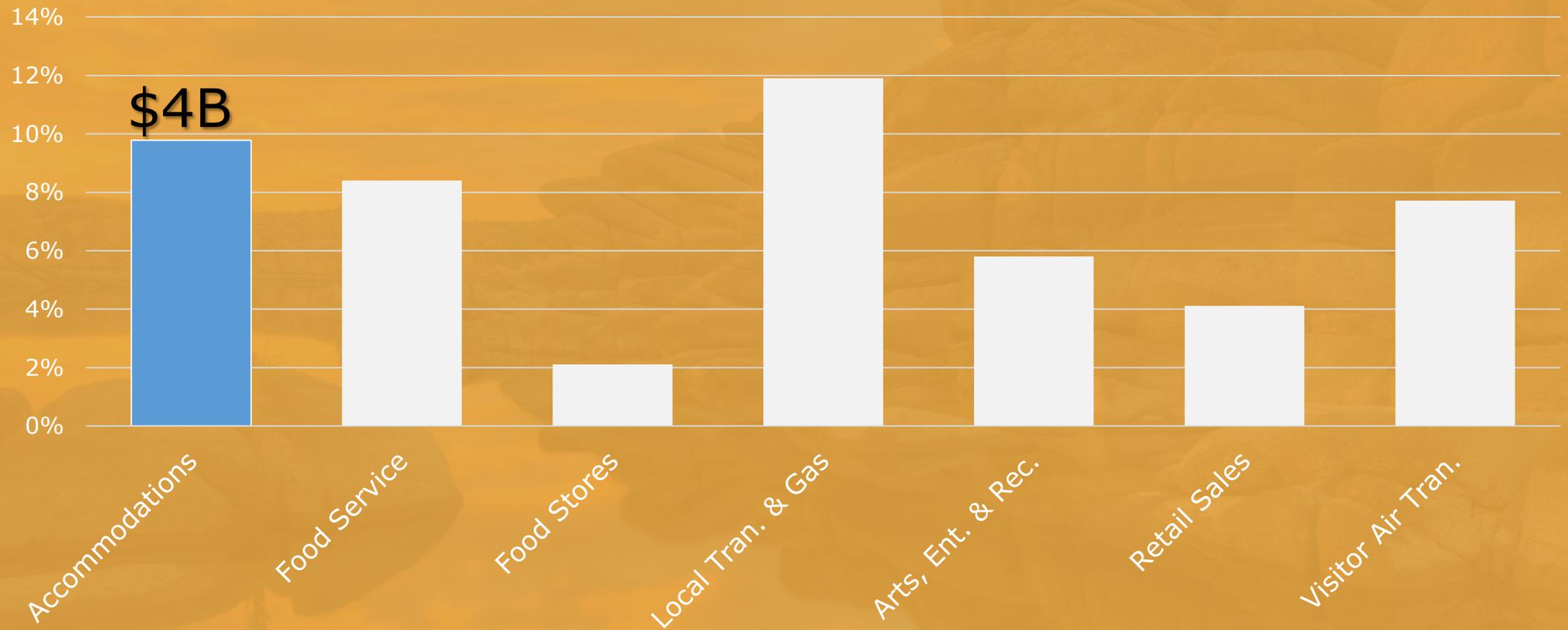
\$ 24
BILLION



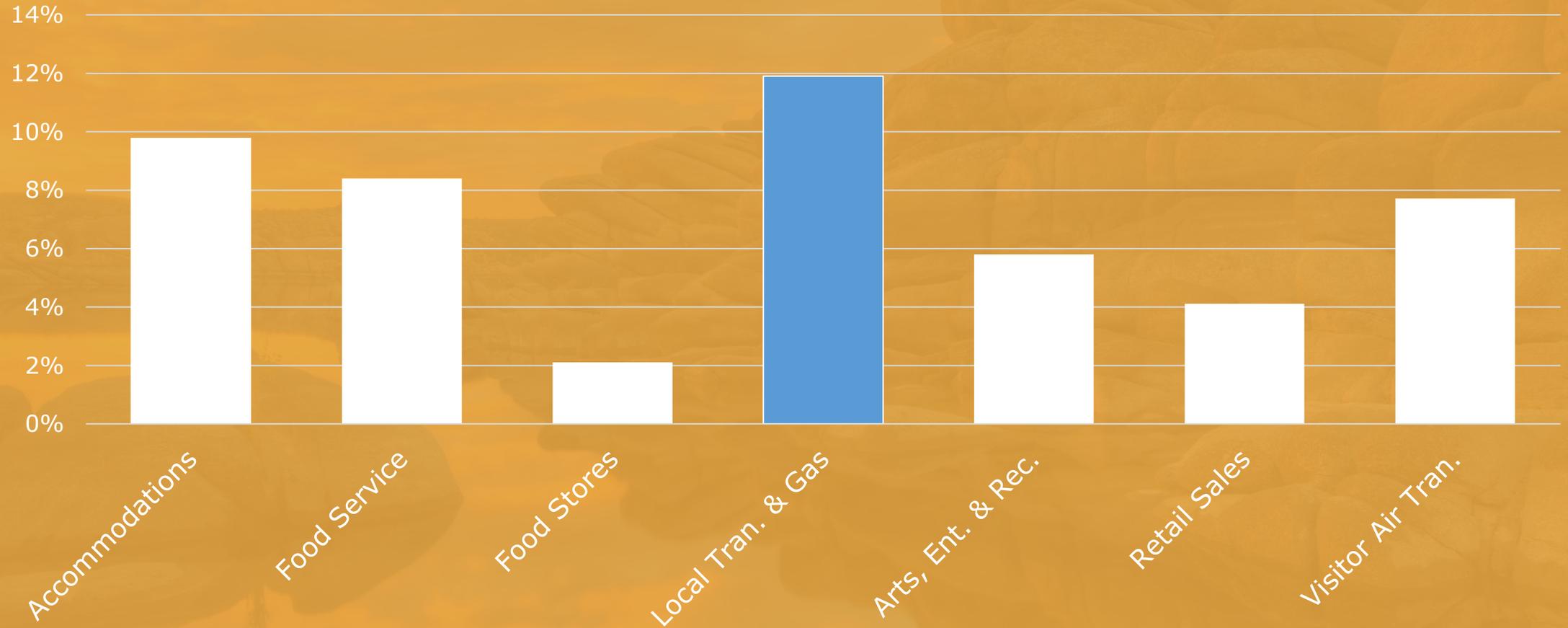
Spending Breakdown

Spending by Commodity Purchased

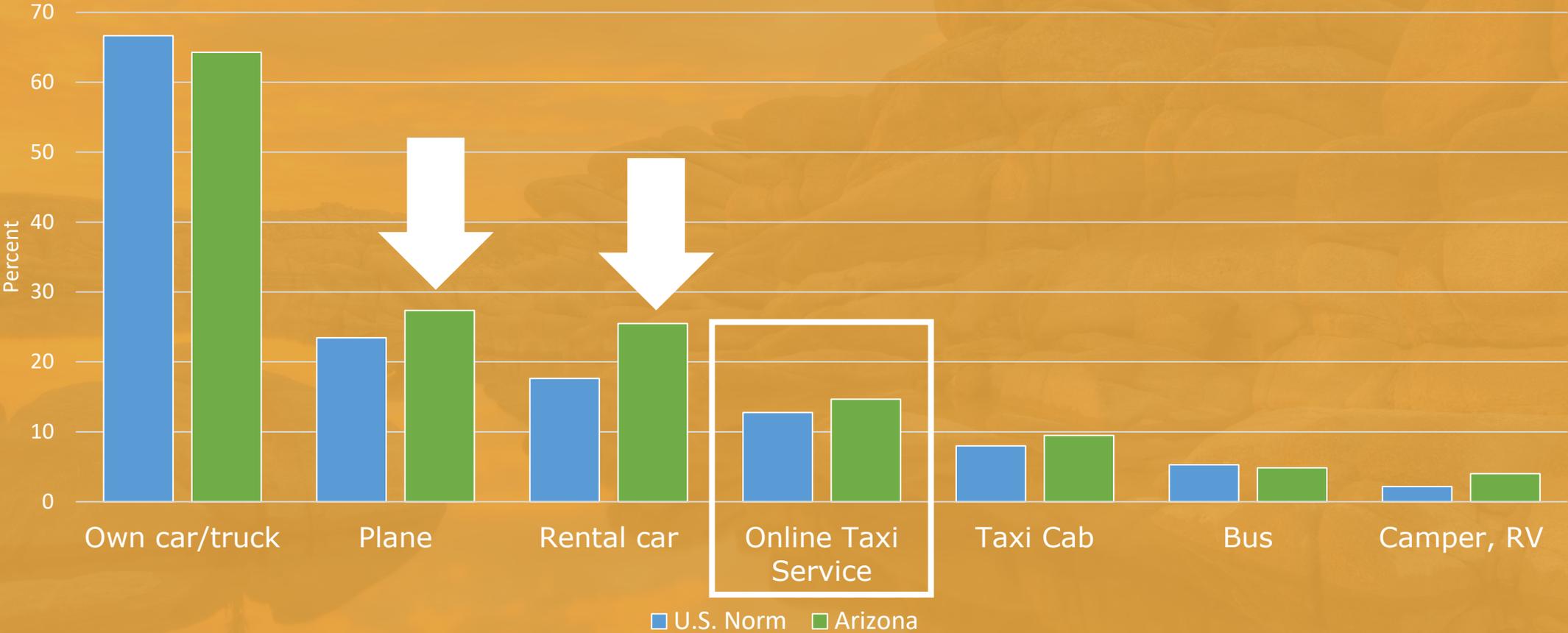
YOY Growth



Spending by Commodity Purchased YOY Growth



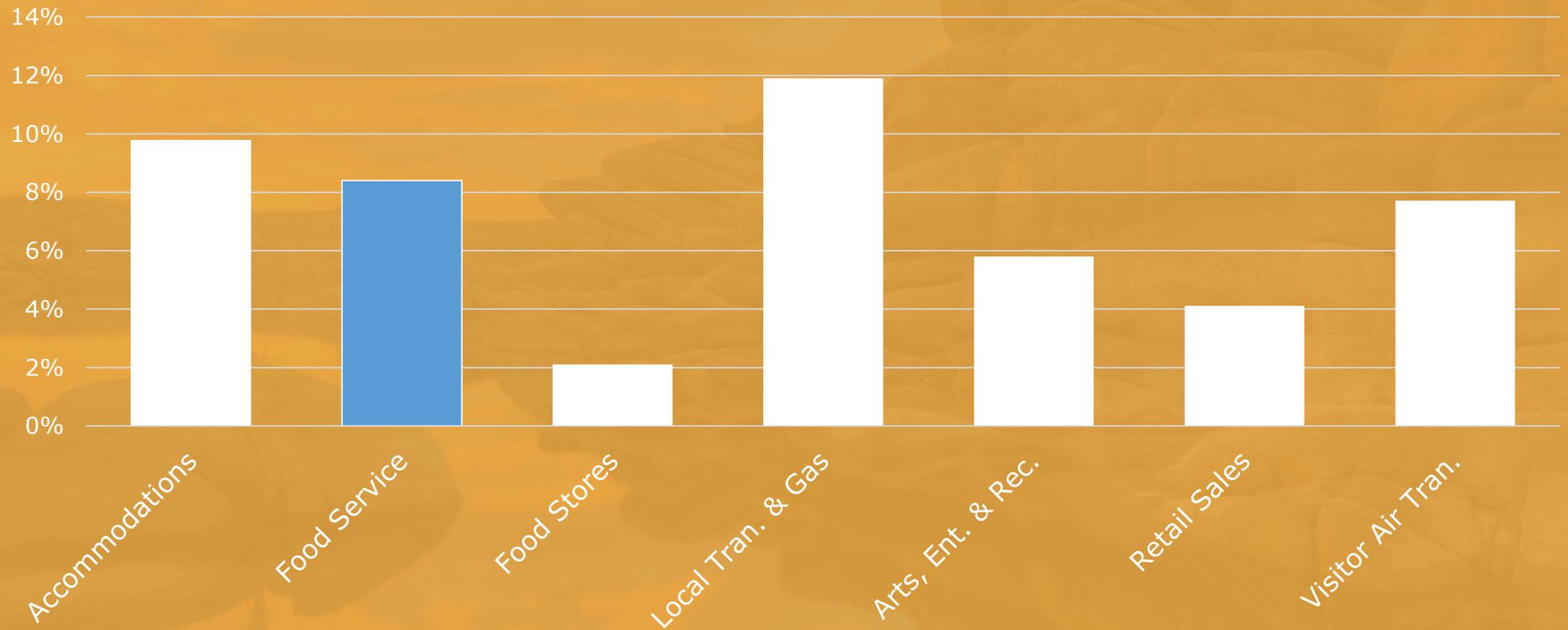
Transportation



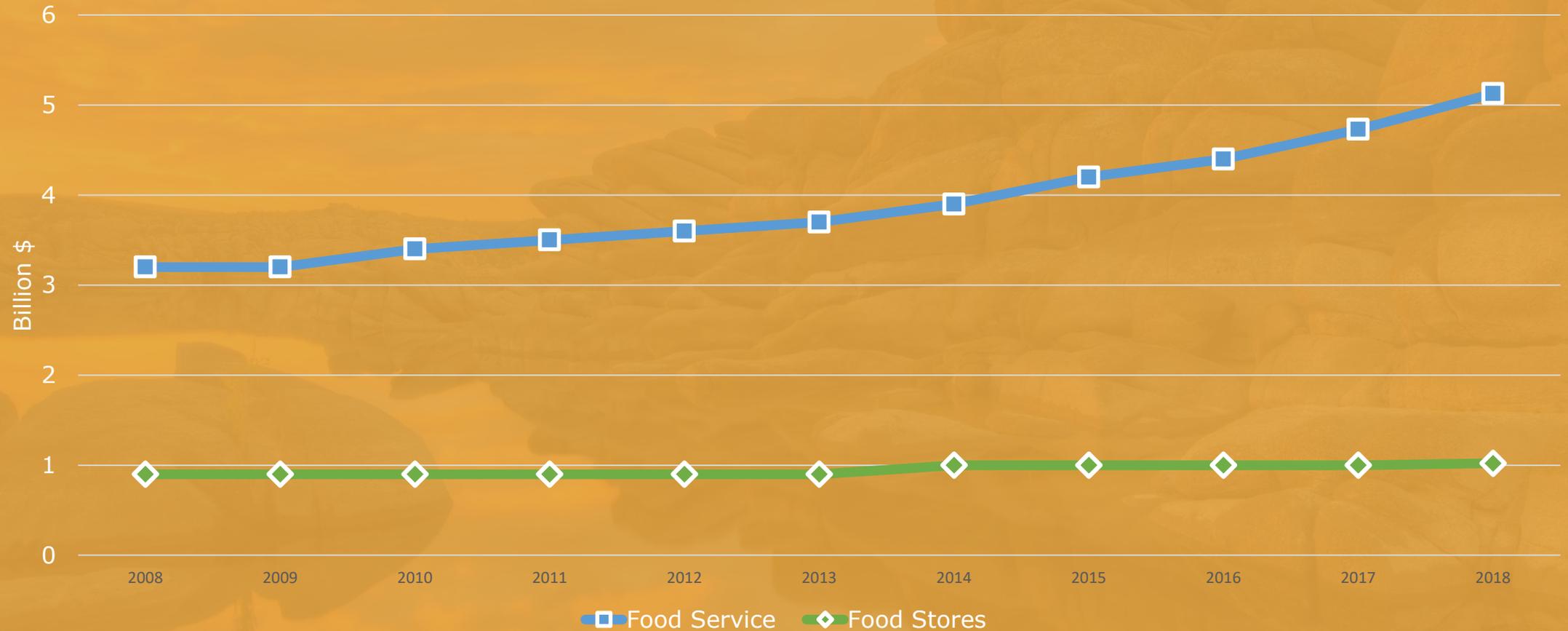
Source: Longwoods International, 2018

Spending by Commodity Purchased

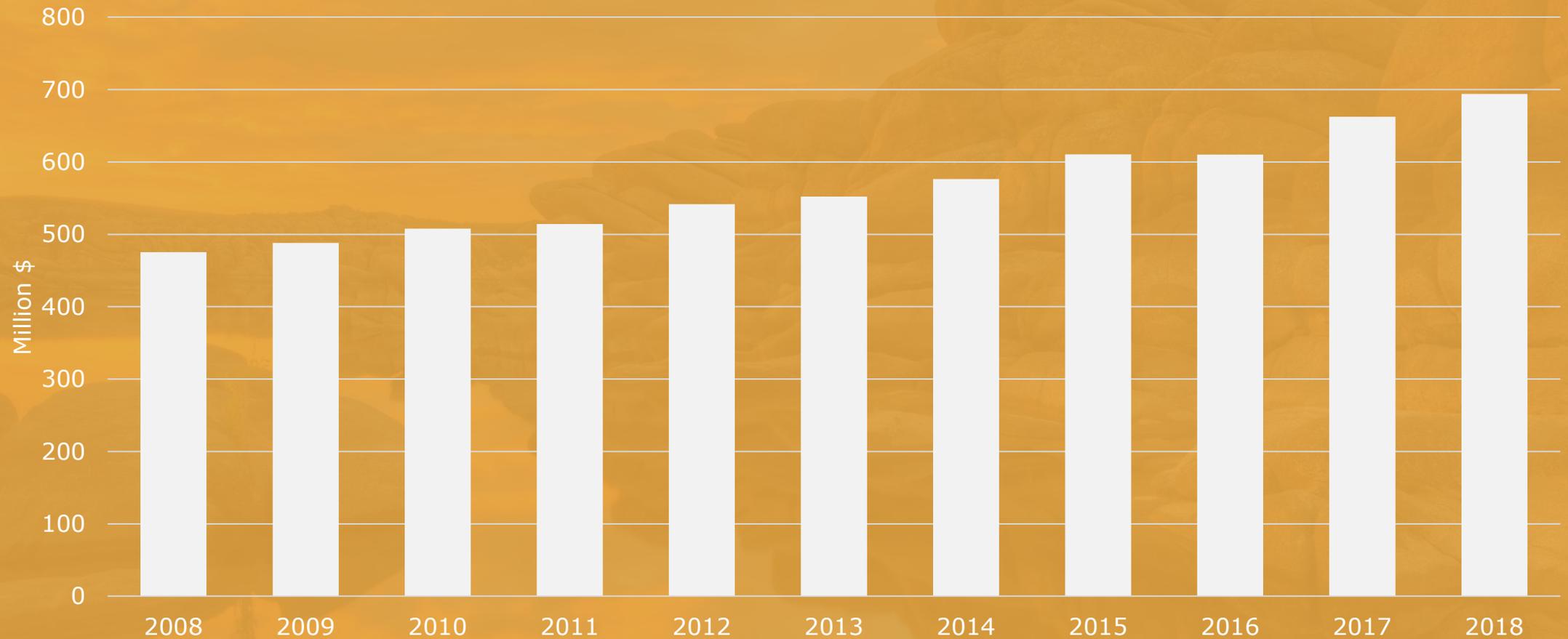
YOY Growth

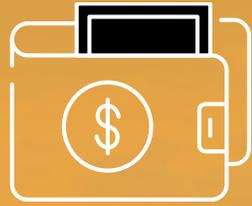


Spending on Food Service



Spending on Food Service – Pima County

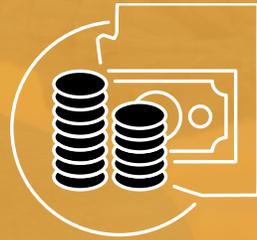




SPENDING



JOBS

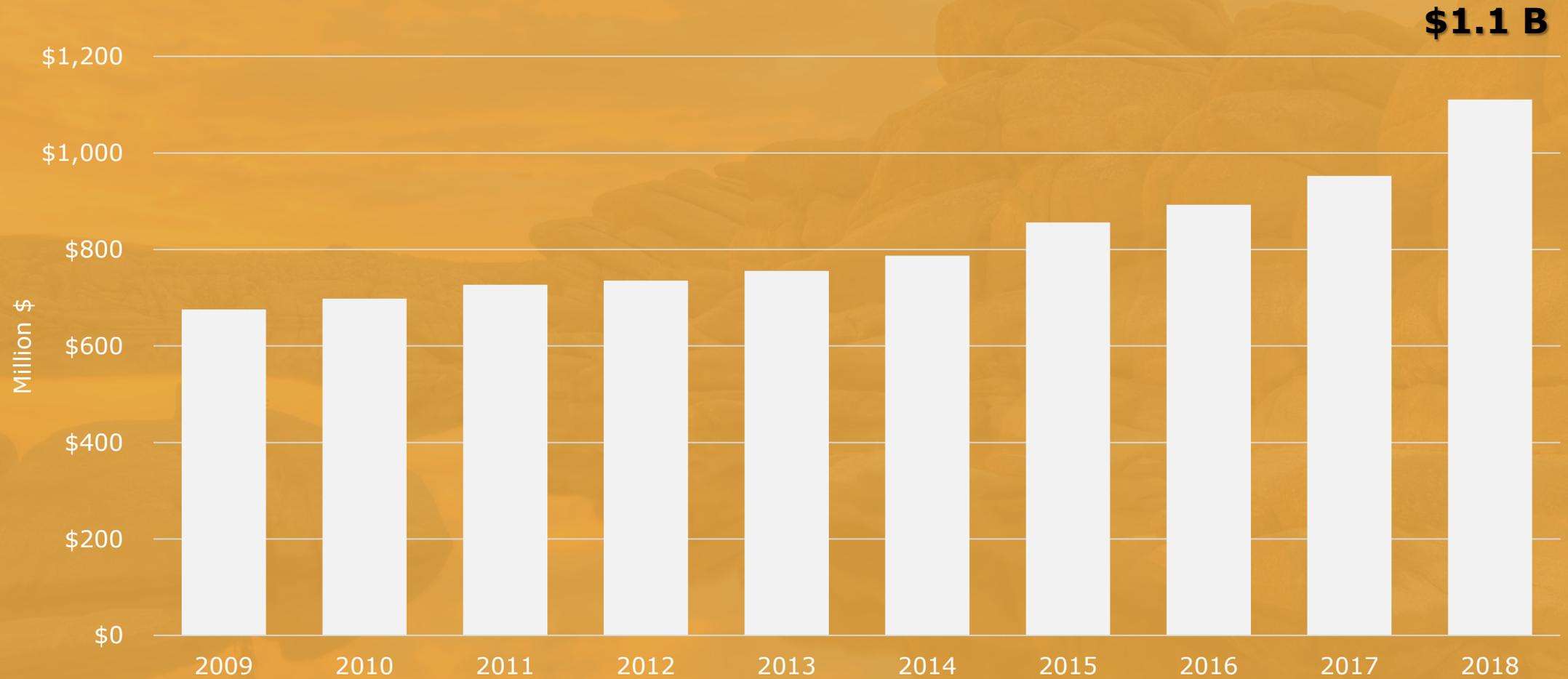


EARNINGS



TAXES

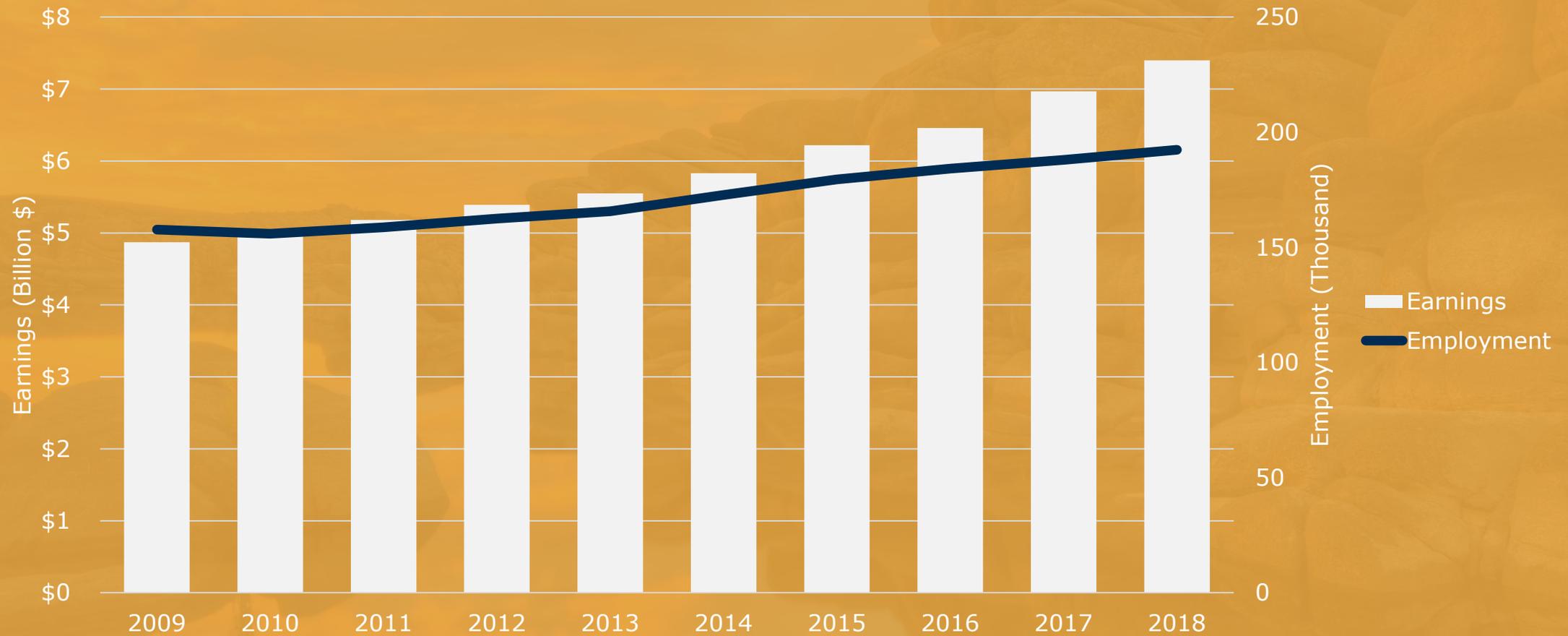
Local Taxes



Tax Revenue per Household

Apache	\$440	Greenlee	\$250	Pima	\$510
Cochise	\$590	La Paz	\$1,420	Pinal	\$420
Coconino	\$2,970	Maricopa	\$850	Santa Cruz	\$1,140
Gila	\$1,060	Mohave	\$630	Yavapai	\$880
Graham	\$500	Navajo	\$860	Yuma	\$750

Earnings and Employment



OVERNIGHT VISITS IN 2018



45.4

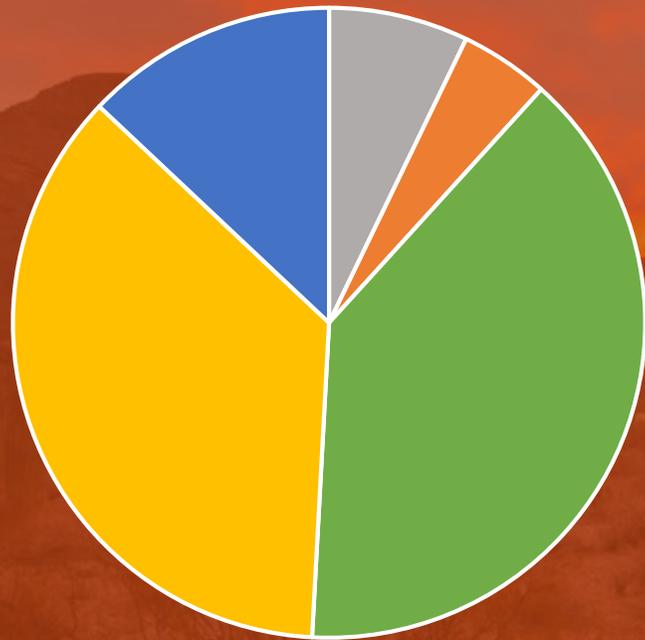
MILLION



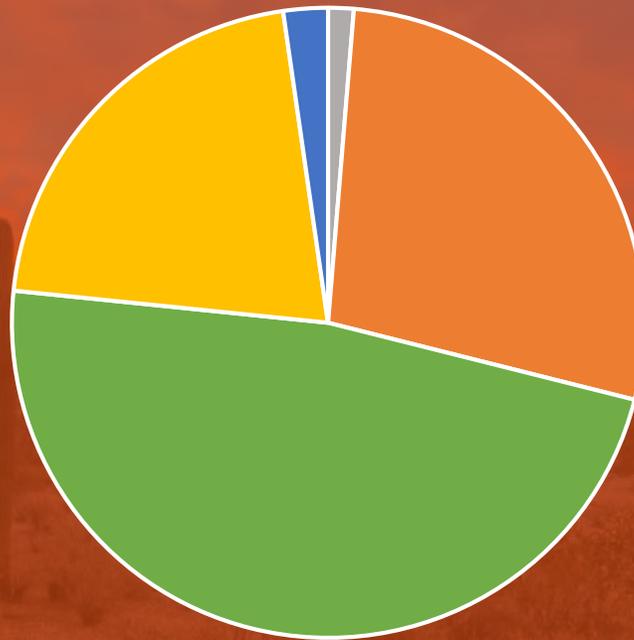
Marketing to Arizona Visitors

Who spends the most in your destination?

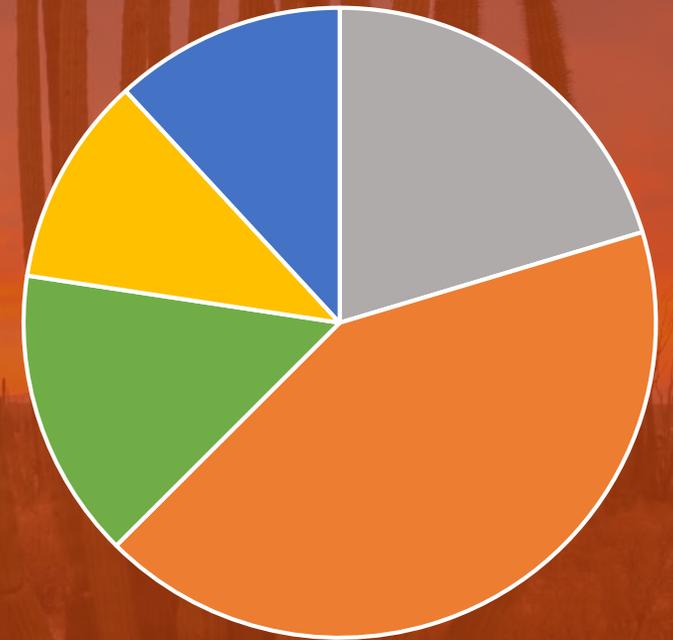
Apache



Pima



La Paz



Vacation Home

Campground

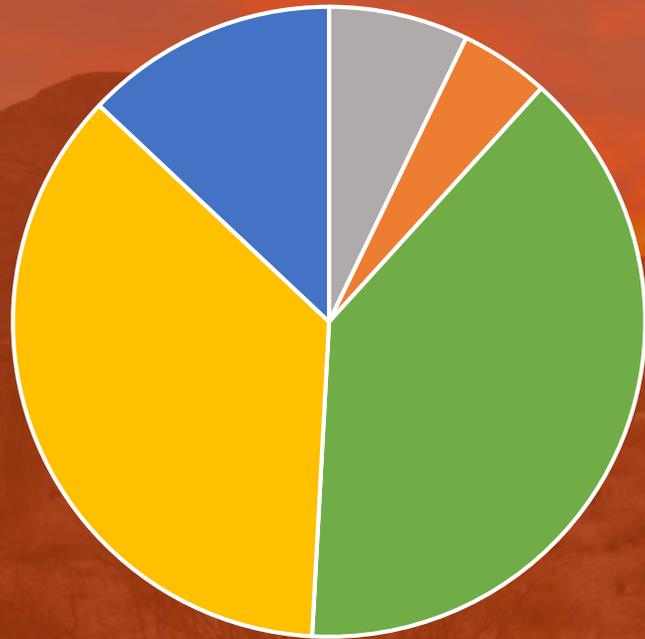
Day Traveler

Hotel, Motel, STVR

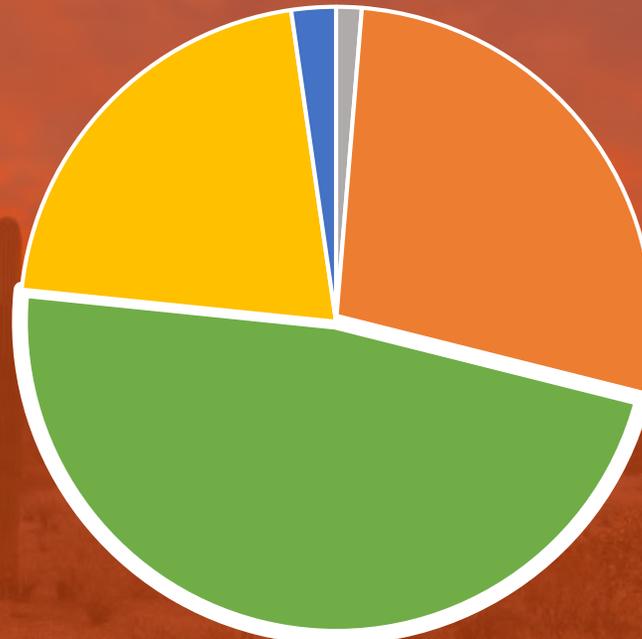
Private Home

Who spends the most in your destination?

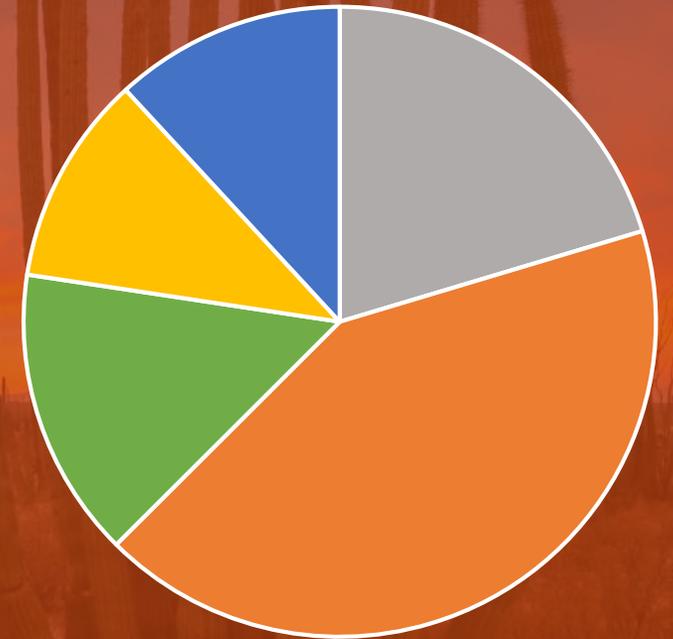
Apache



Pima



La Paz



Vacation Home

Campground

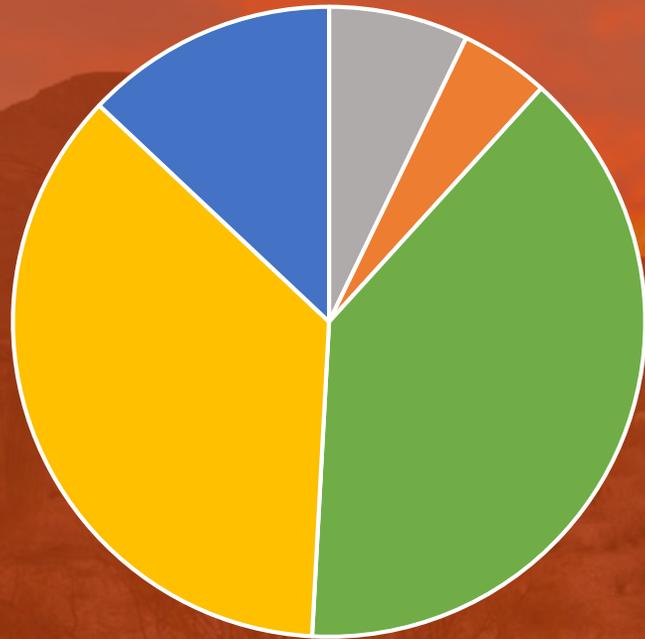
Day Traveler

Hotel, Motel, STVR

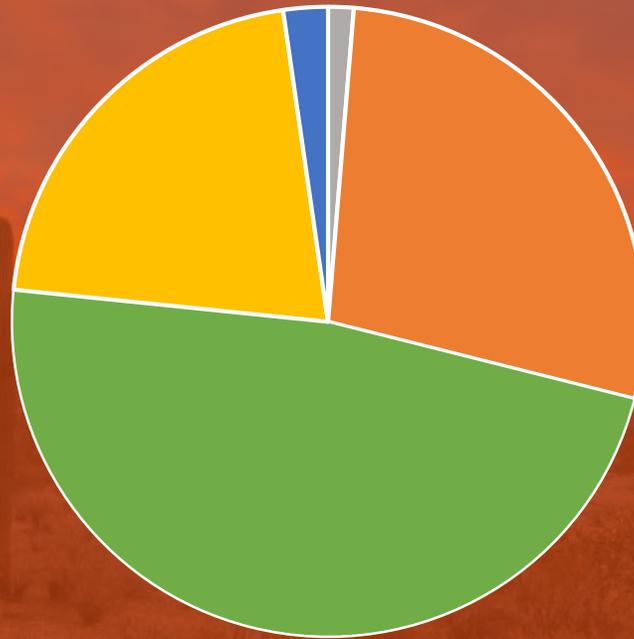
Private Home

Who spends the most in your destination?

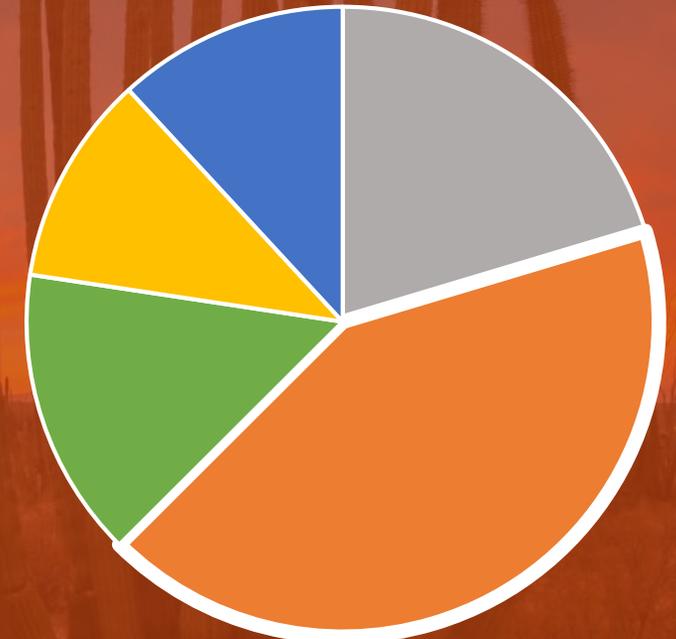
Apache



Pima



La Paz



Vacation Home

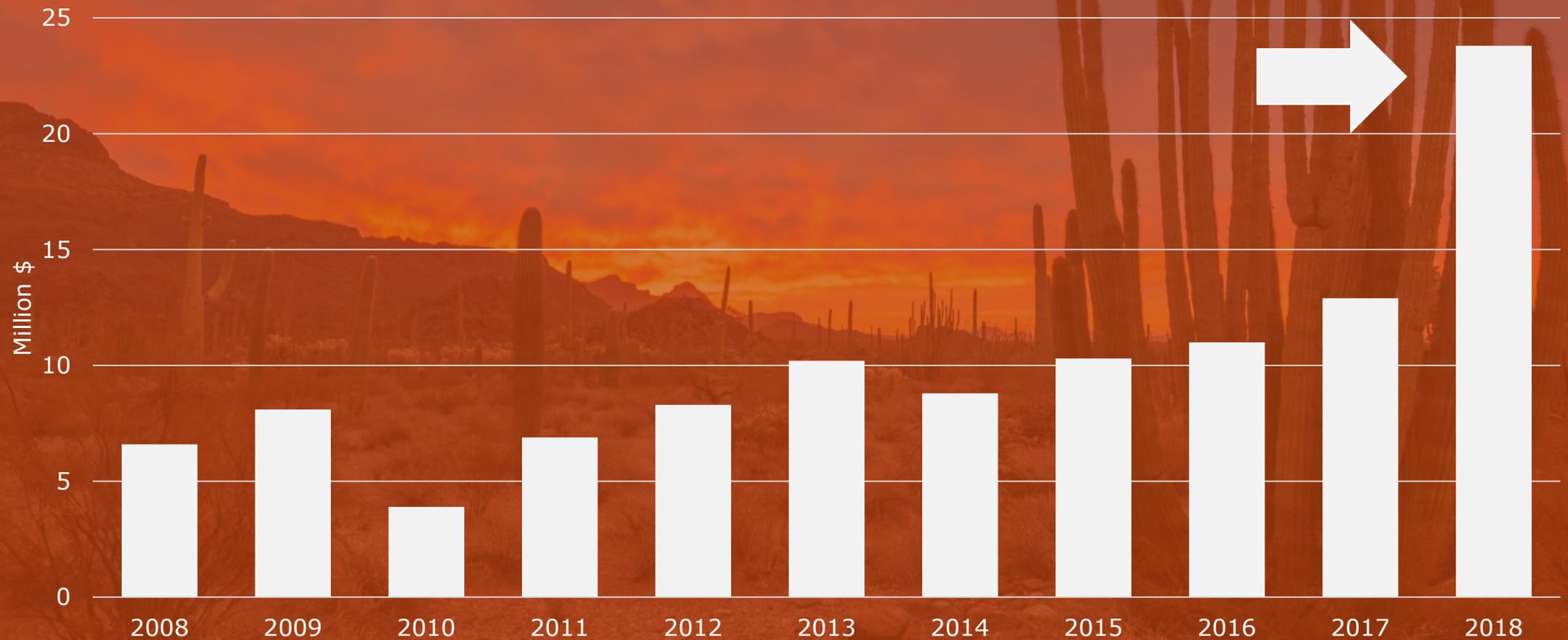
Campground

Day Traveler

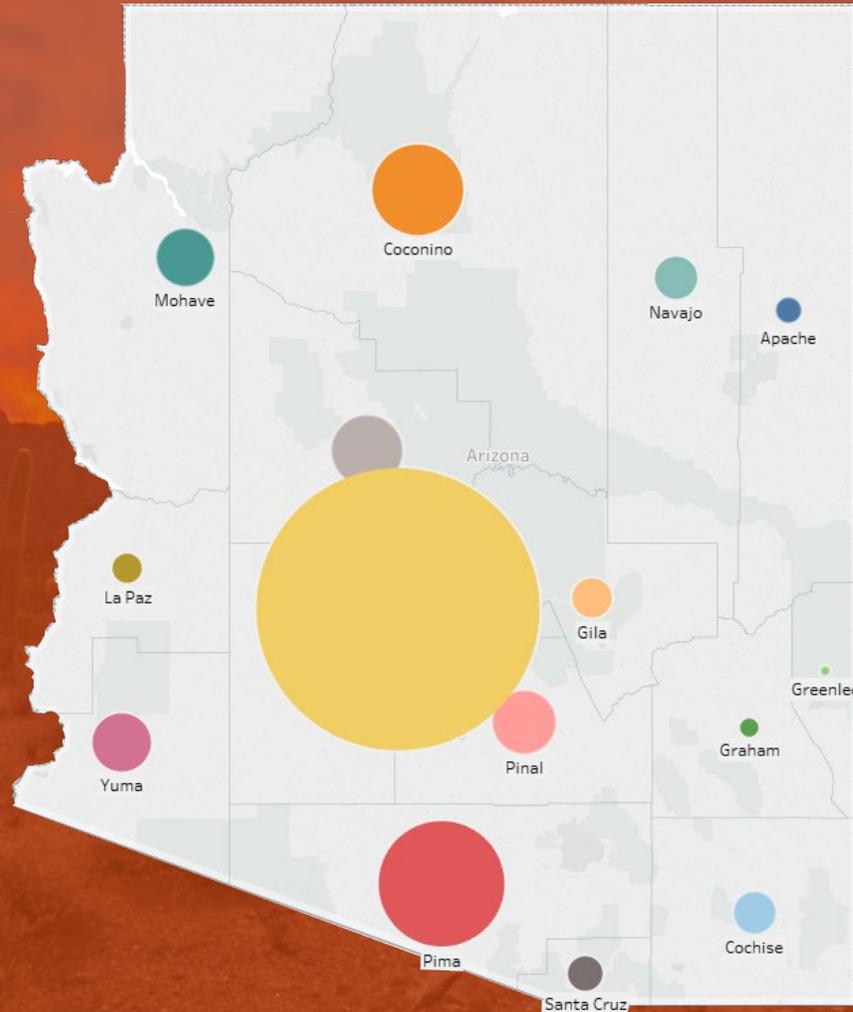
Hotel, Motel, STVR

Private Home

Spending by Hotel Guests in La Paz



Direct Travel Spend by County





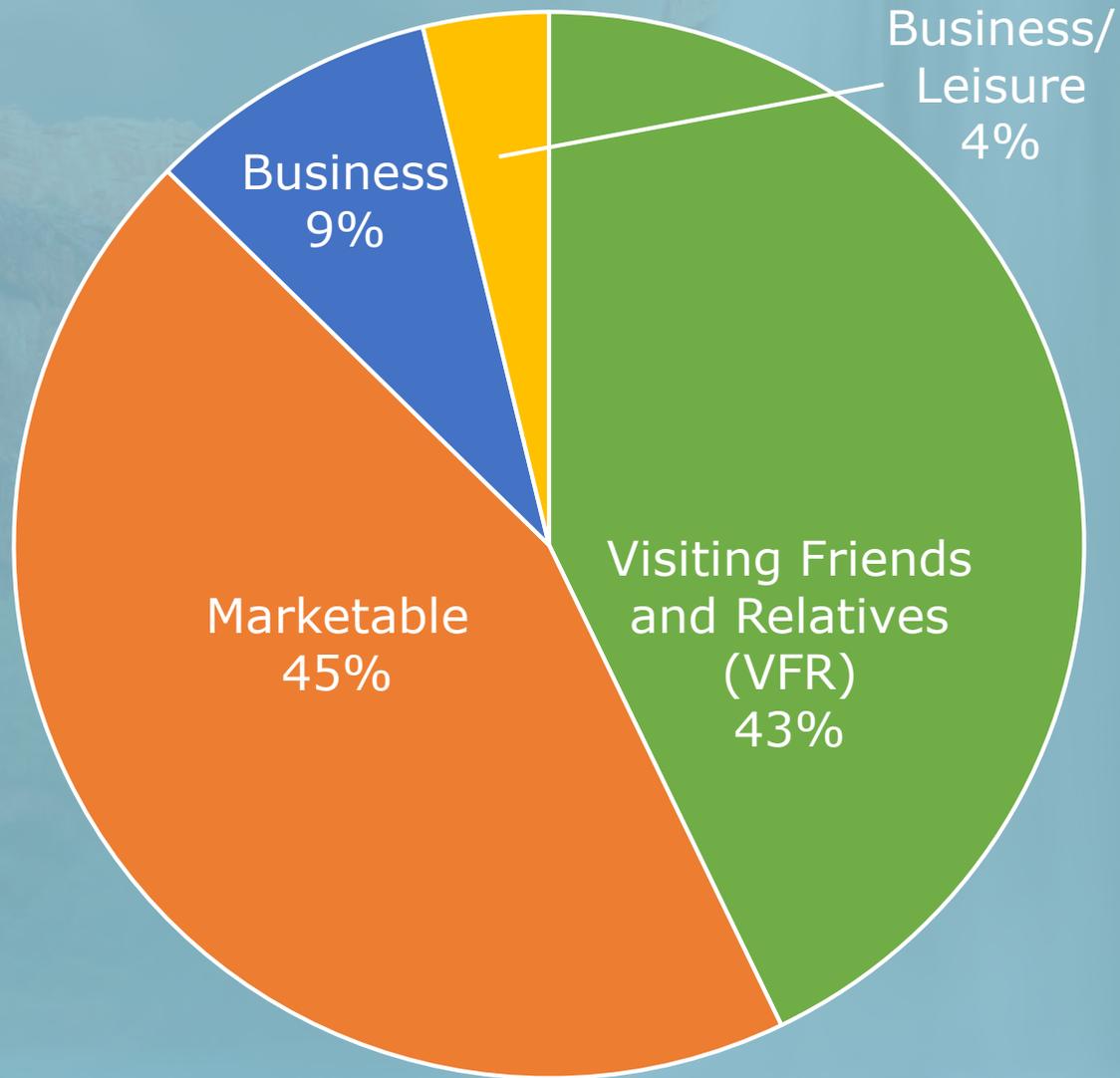
Domestic Visitor Profile

DOMESTIC VISITS IN 2018



39.6

MILLION

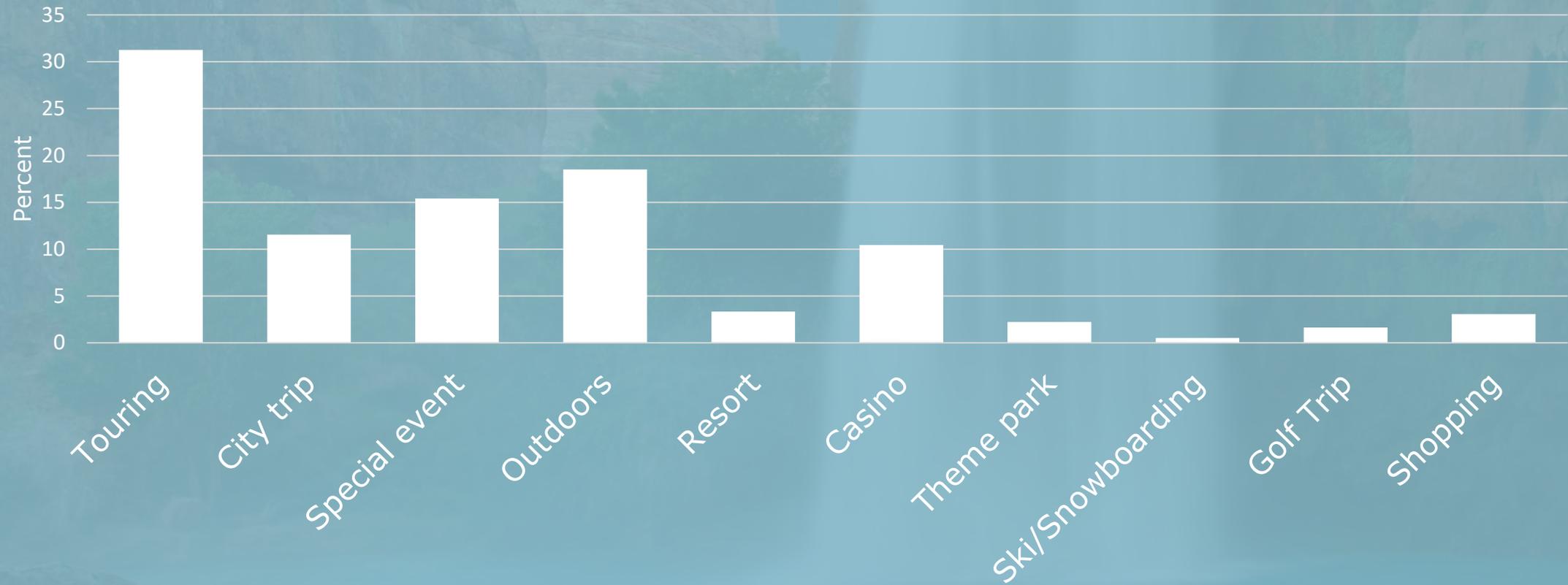


Main Purpose of Trip



Why did they choose us?

Main Purpose of Marketable Trips to Arizona



Why did they choose us?

Main Purpose of Marketable Trips to Arizona



Why did they choose us?

Main Purpose of Marketable Trips to Arizona



Why did they choose us?

Main Purpose of Marketable Trips to Arizona



Travel Drivers to Arizona – Promote these!

State/National/Tribal
parks

Diverse scenery

Offers something for
the family

Great vacation for
couples

Warm, friendly,
welcoming people

Fun and relaxing place
to visit

Arizona Destination Differentiators – Maintain these!

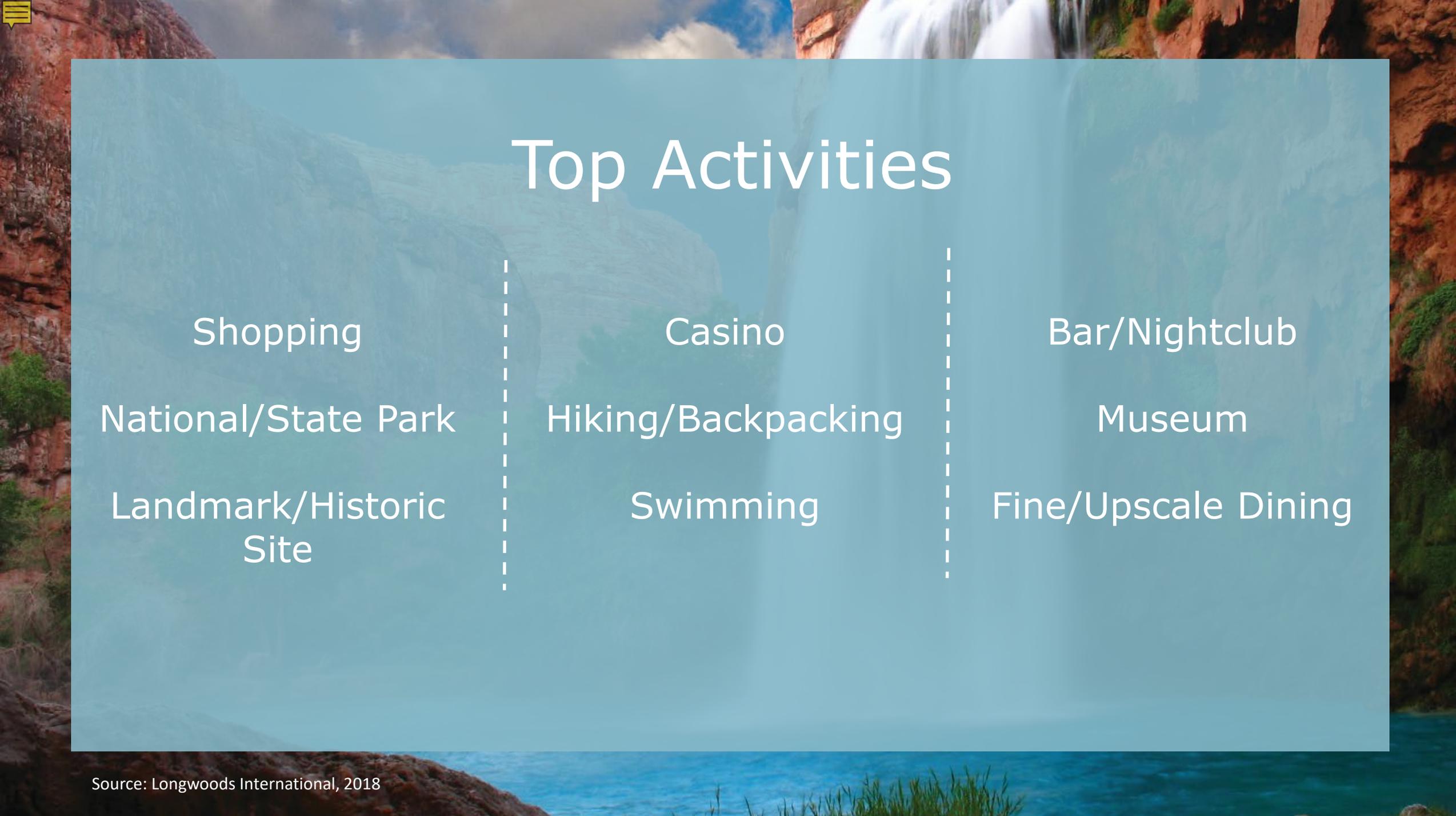
American Indian
experience

Old West

Outdoor Adventure

Good place to relax by
the pool

Easy to fly to



Top Activities

Shopping

National/State Park

Landmark/Historic
Site

Casino

Hiking/Backpacking

Swimming

Bar/Nightclub

Museum

Fine/Upscale Dining

Top Activities

Shopping

Casino

Bar/Nightclub

National/State Park

Hiking/Backpacking

Museum

Landmark/Historic Site

Swimming

Fine/Upscale Dining

*Activities in which participation outpaces the national average by 5% or more.

A scenic landscape featuring a body of water in the foreground, reflecting the sky and surrounding mountains. The mountains are rugged and rocky, with some greenery. The sky is filled with dramatic, dark clouds, suggesting a sunset or sunrise. A semi-transparent dark blue rectangle is overlaid on the center of the image, containing the text.

Origin Markets

Arizona

VFR

Arizona
California
Texas
Illinois
Colorado

Marketable

Arizona
California
Texas
Florida
New York

Business

Arizona
California
Texas
Florida
Colorado

West Coast Region

VFR

California
Arizona
Texas
Illinois
Florida

Marketable

California
Arizona
Texas
New York
Nevada

Business

Arizona
California
Utah
Georgia
Texas

Northern Region

VFR

Arizona
California
Texas
Florida
Illinois

Marketable

Arizona
California
Texas
New York
Florida

Business

Arizona
California
Colorado
Michigan
Georgia

North Central Region

VFR

California
Arizona
Illinois
Florida
Colorado

Marketable

Arizona
California
New York
Texas
Illinois

Business

Arizona
California
Washington
Montana
Texas

Tucson & Southern Region

VFR

Arizona
California
Illinois
Minnesota
Texas

Marketable

Arizona
California
Texas
Washington
Illinois

Business

Arizona
California
Texas
Florida
Colorado

Phoenix & Central Region

VFR

Arizona
California
Illinois
Colorado
Texas

Marketable

Arizona
California
Texas
Nevada
Illinois

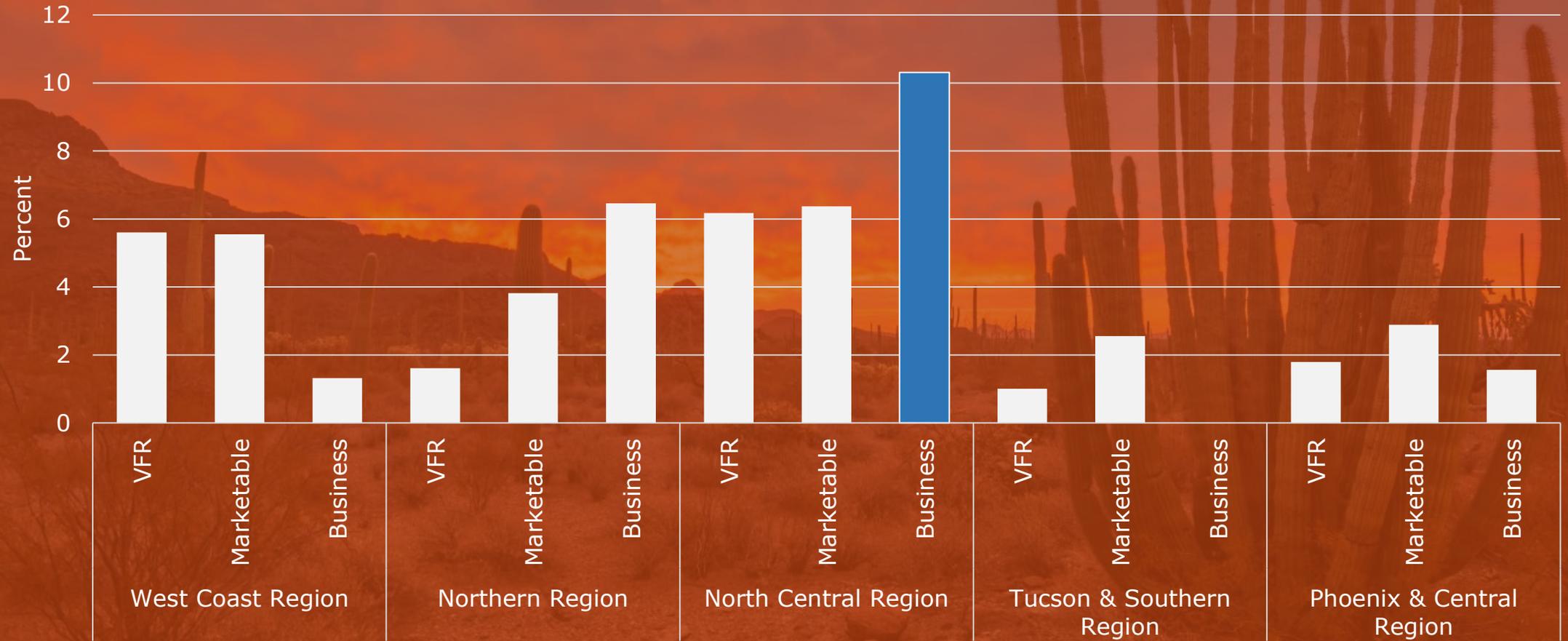
Business

Arizona
California
Illinois
Texas
Florida

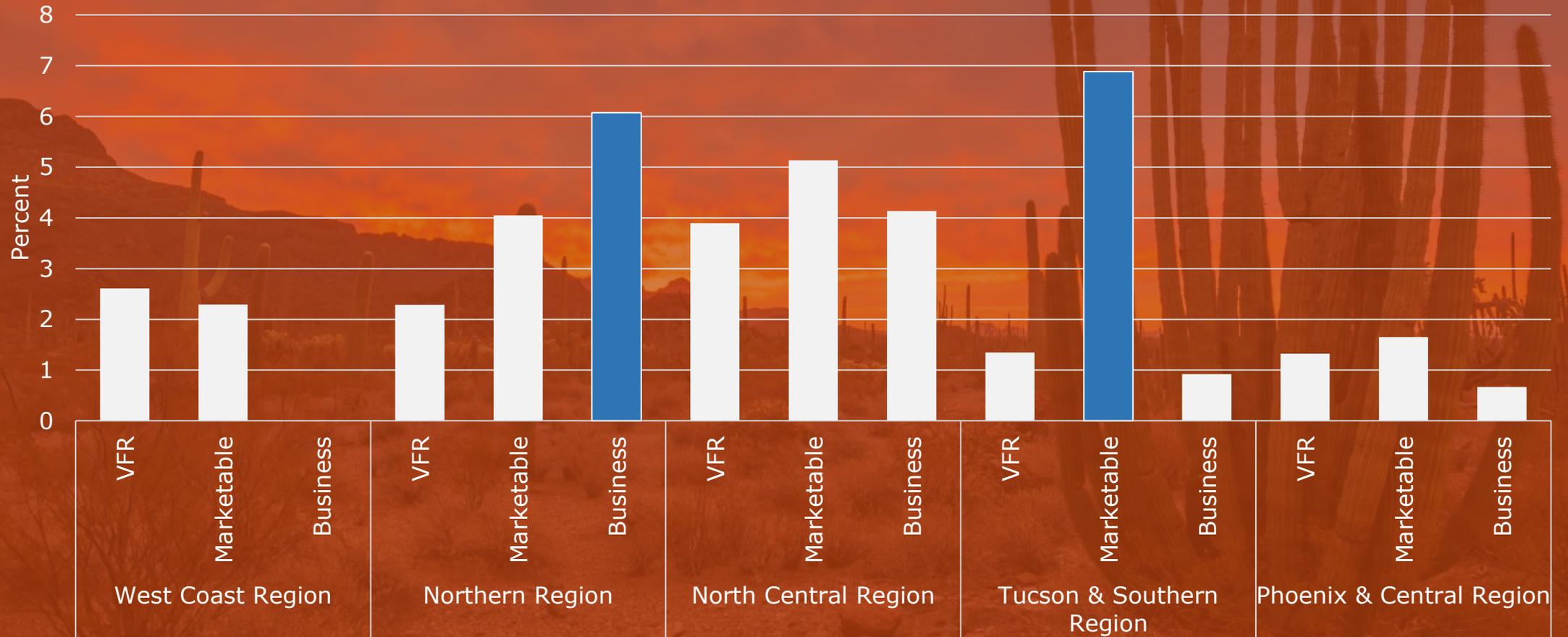
A photograph of a desert landscape at sunset. The sky is a mix of blue, orange, and pink. In the foreground, there are several tall saguaro cacti. The ground is rocky and covered with sparse, dry vegetation. A large, semi-transparent orange rectangle is overlaid on the center of the image, containing the text.

Destination Differentiators

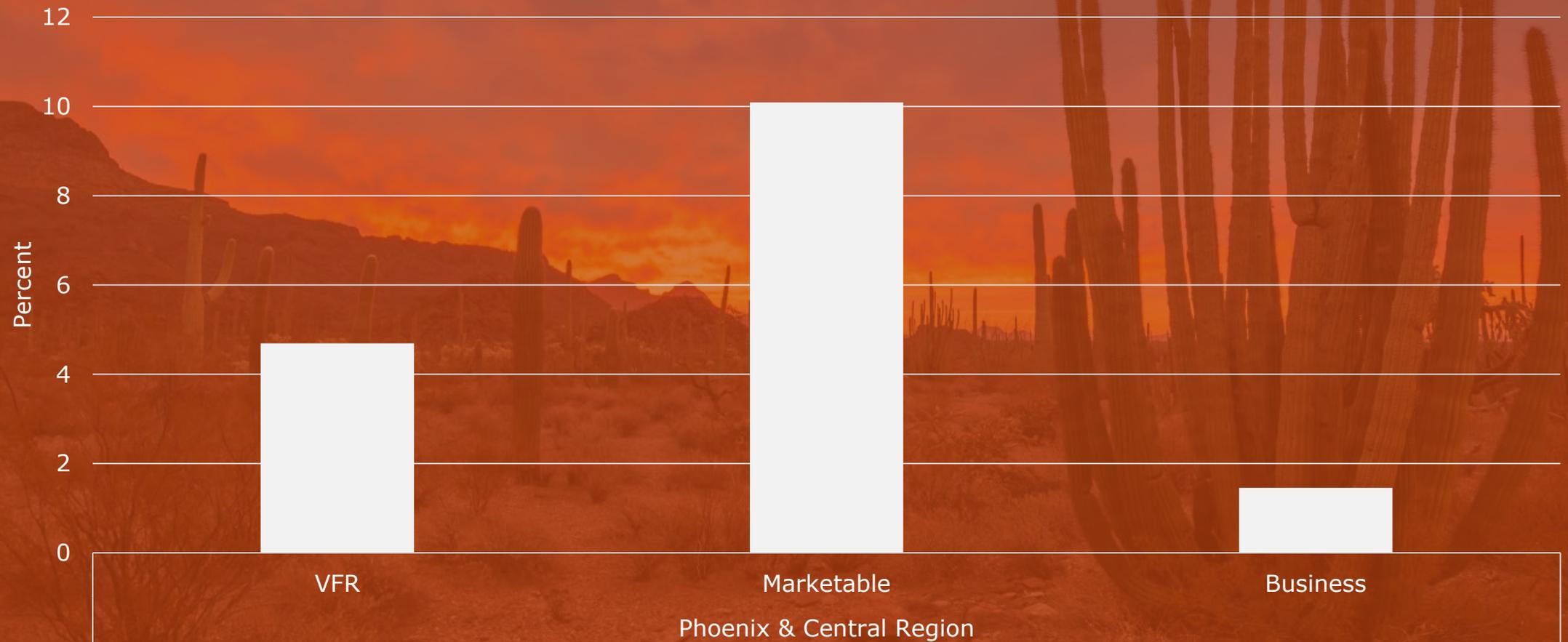
Off-Roading



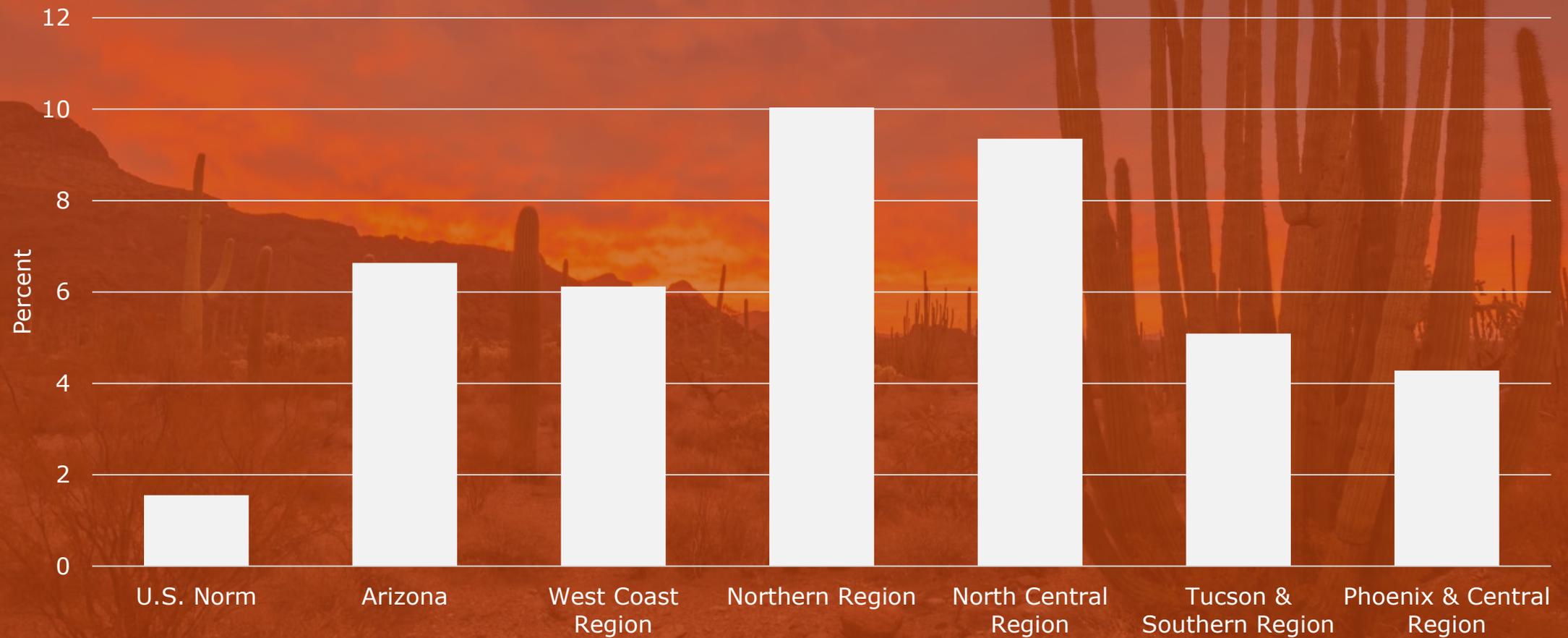
Birding



Professional/College Sports Event



Visit an American Indian Community



A scenic landscape photograph featuring a calm lake reflecting a forested shoreline under a dramatic, cloudy sky. Large, light-colored rocks are scattered in the foreground, interspersed with green grass and small yellow wildflowers. A semi-transparent green rectangular overlay is centered over the image, containing the text.

International Visitation

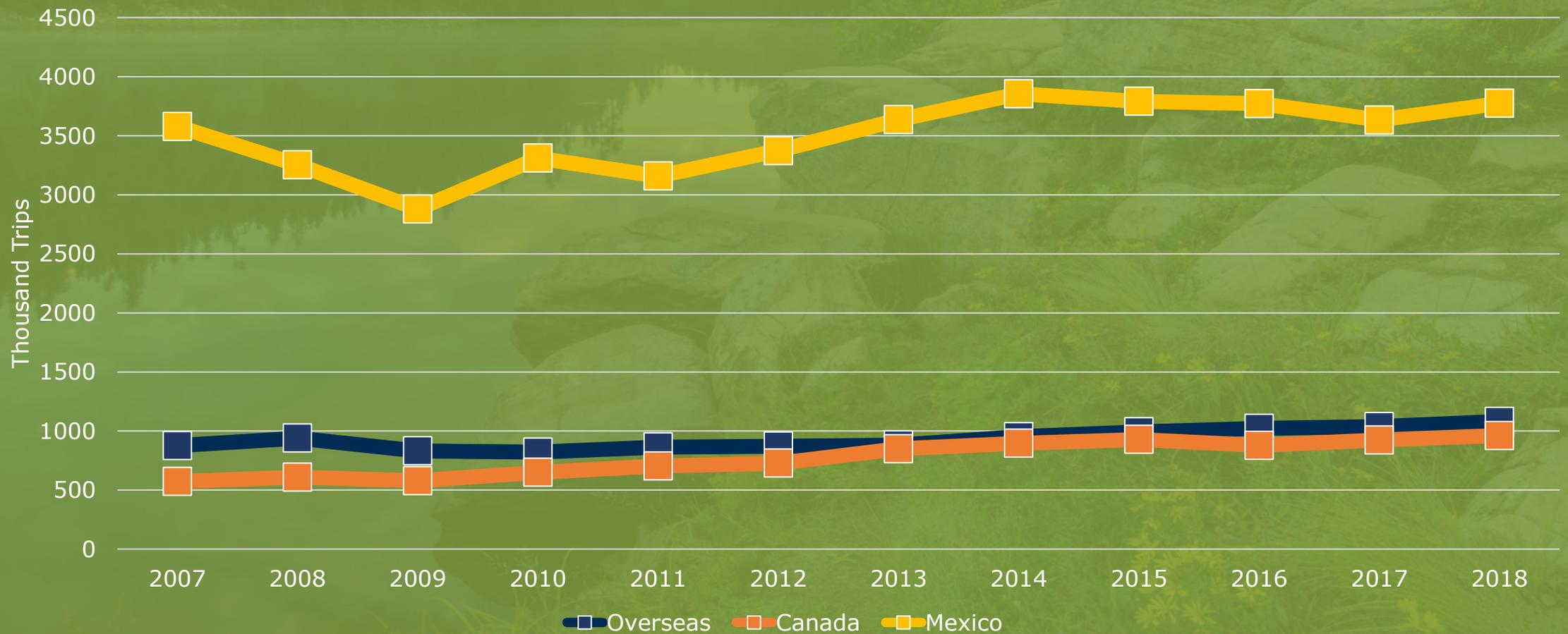
INTERNATIONAL OVERNIGHT
VISITS IN 2018



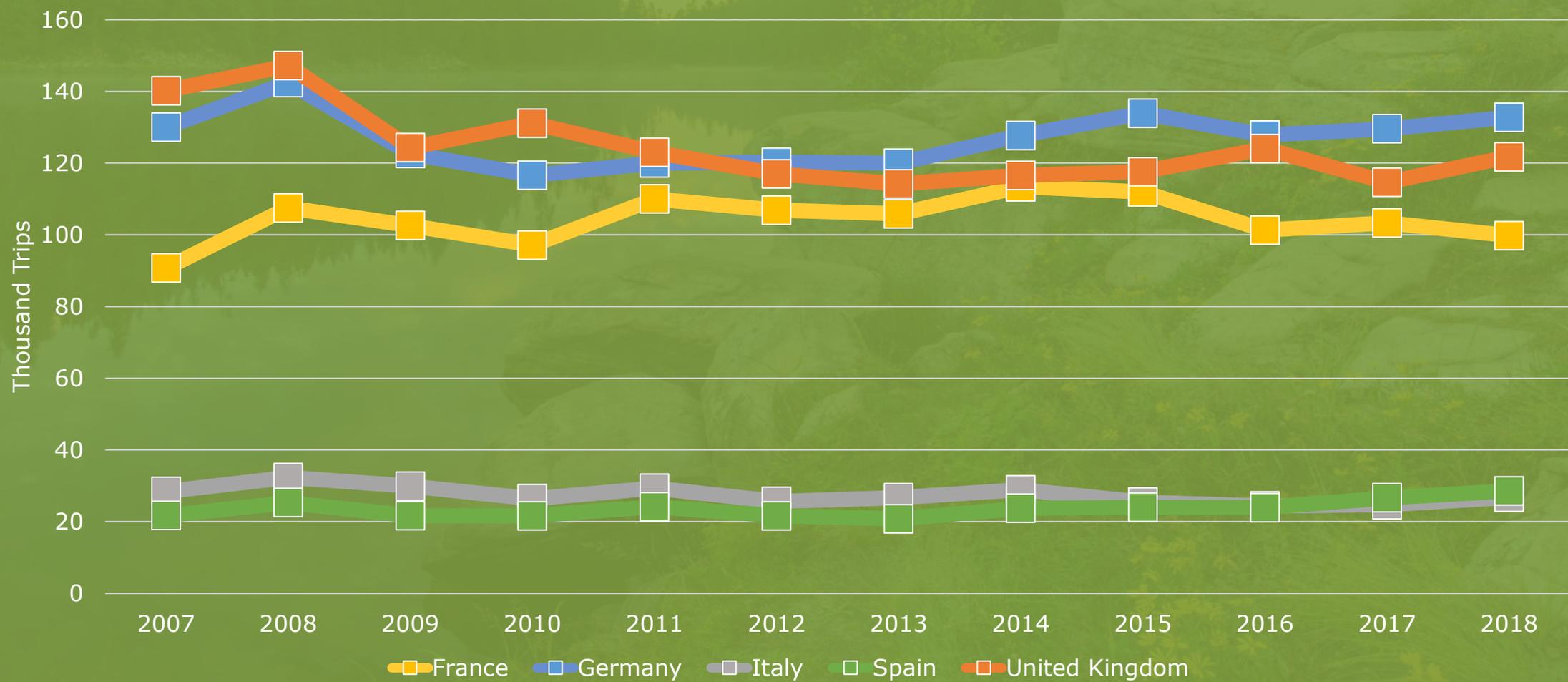
5.82

MILLION

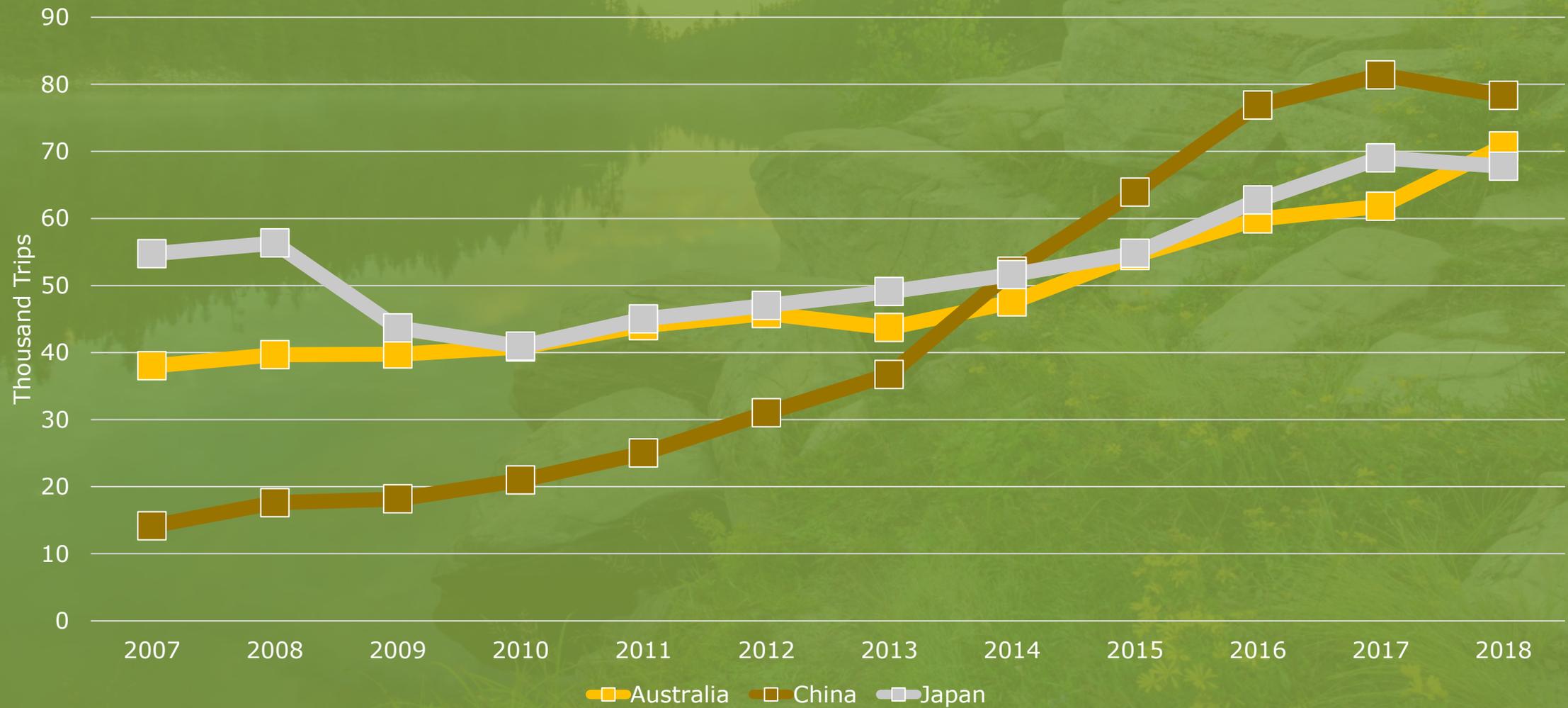
International Visitation to AZ



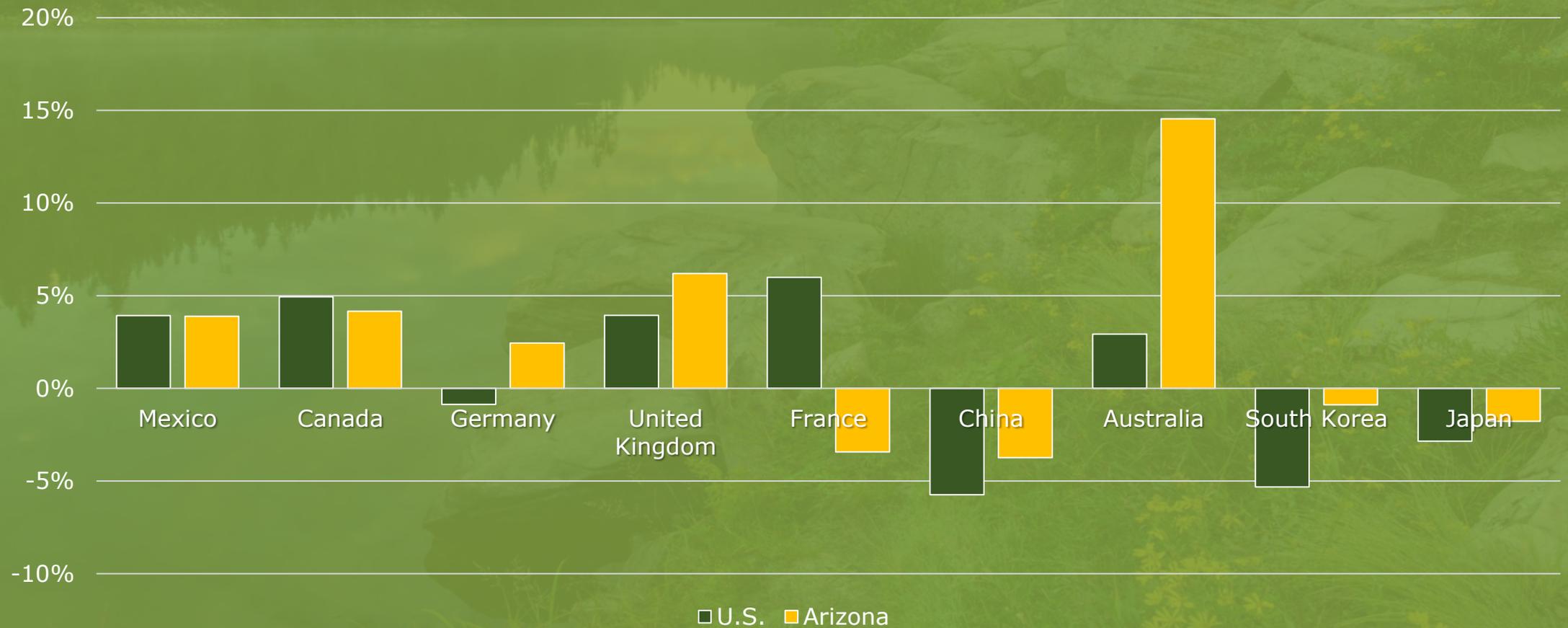
Europe



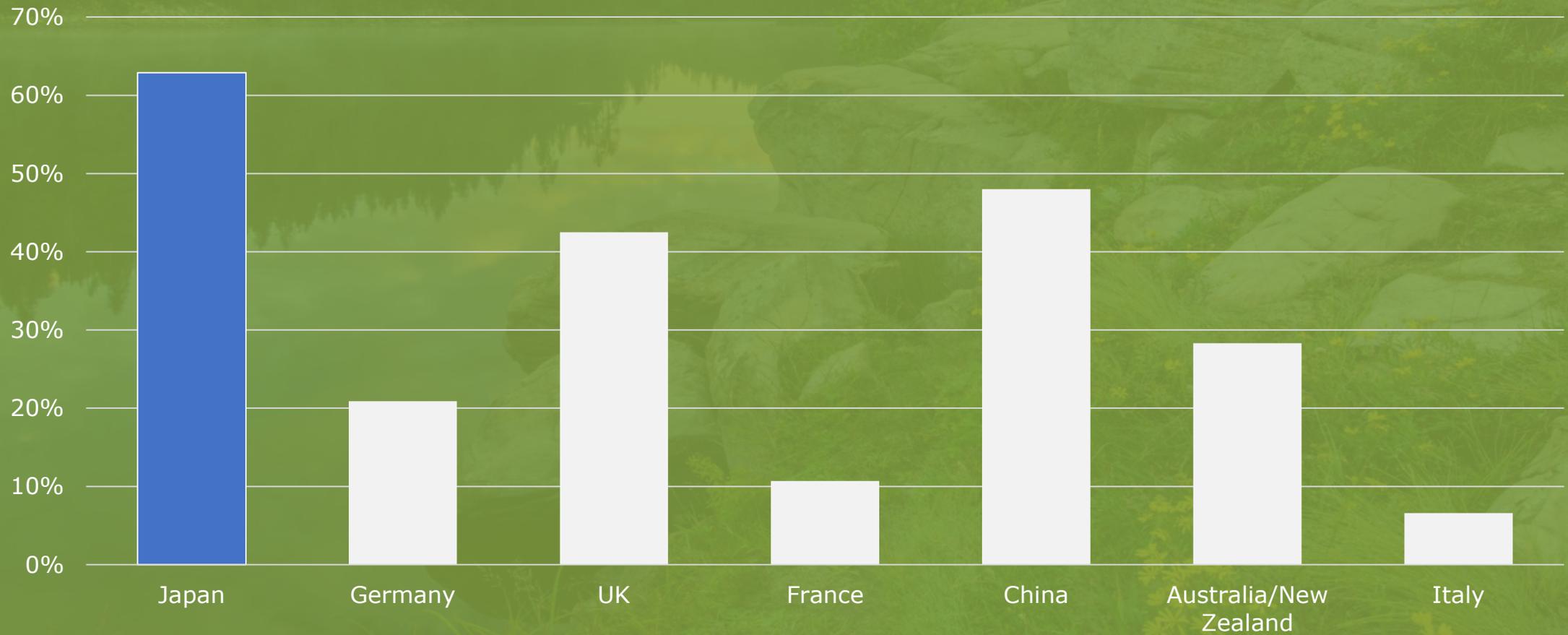
Asia Pacific



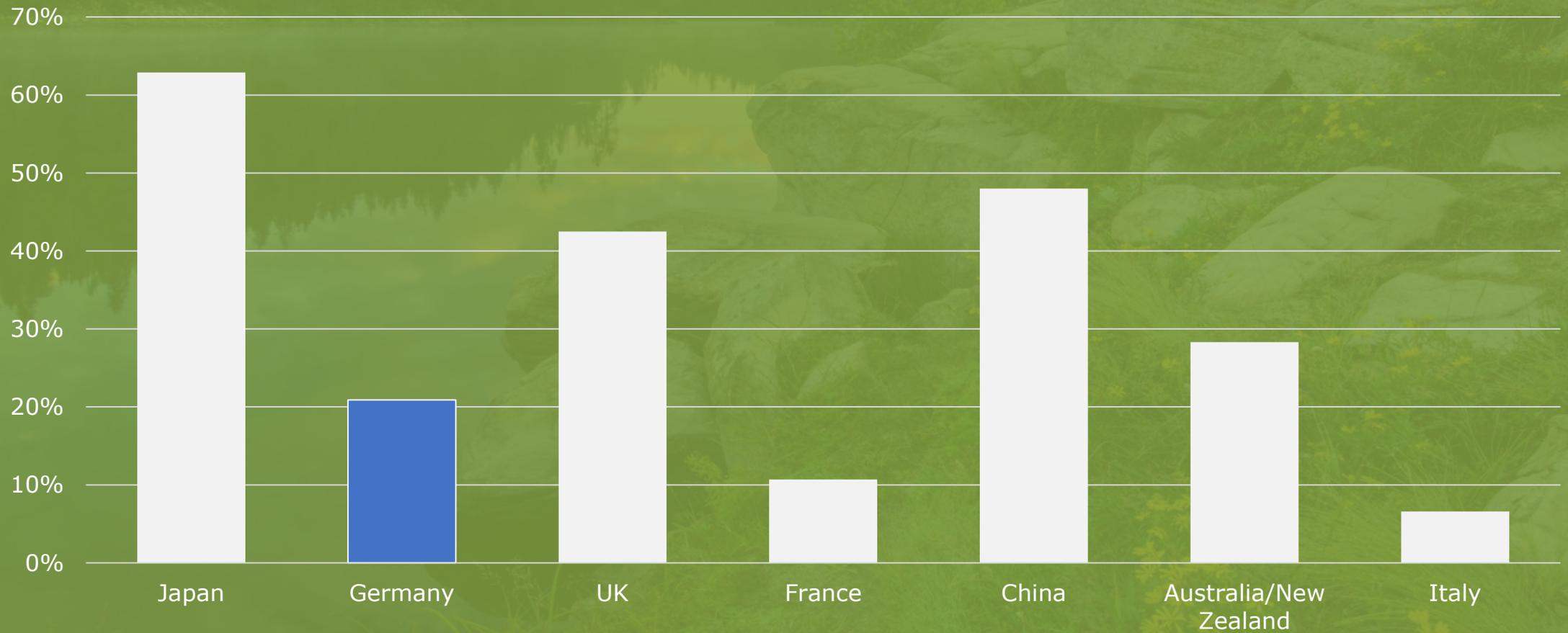
Change in Visitation YOY



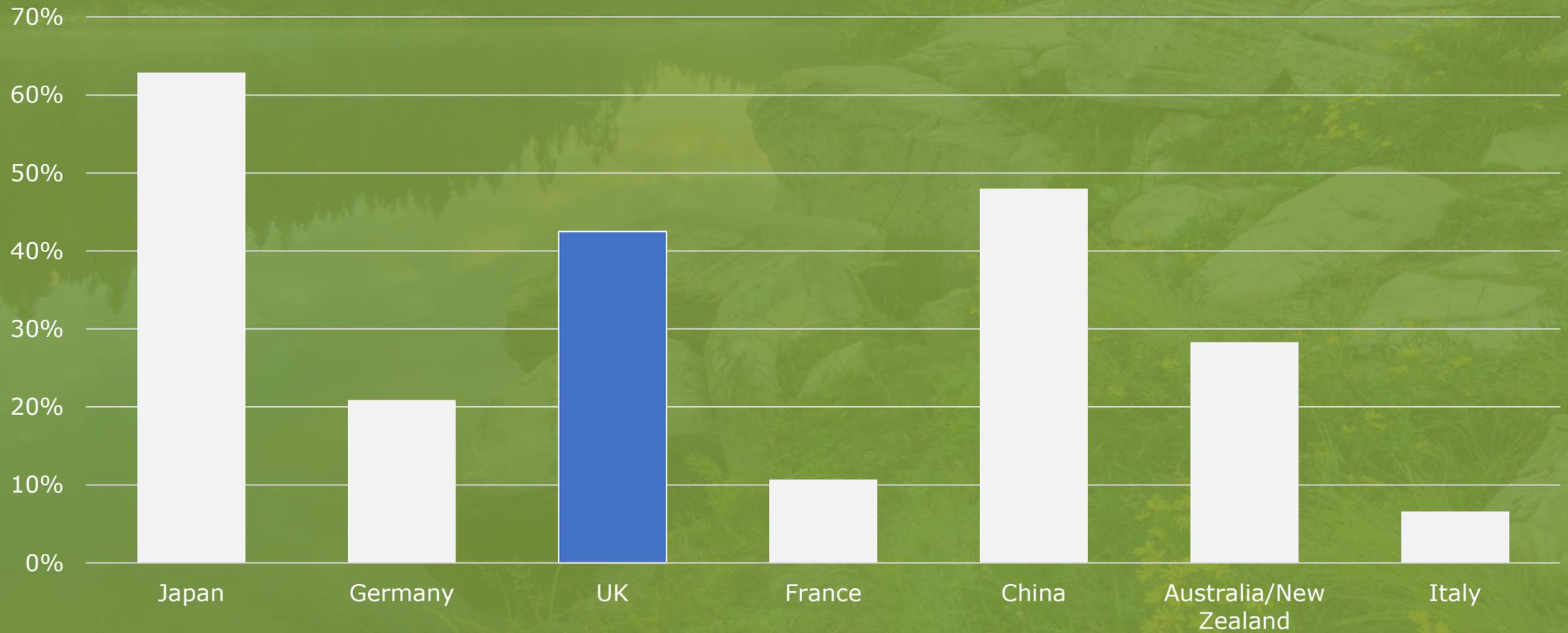
Arizona was the MAIN destination



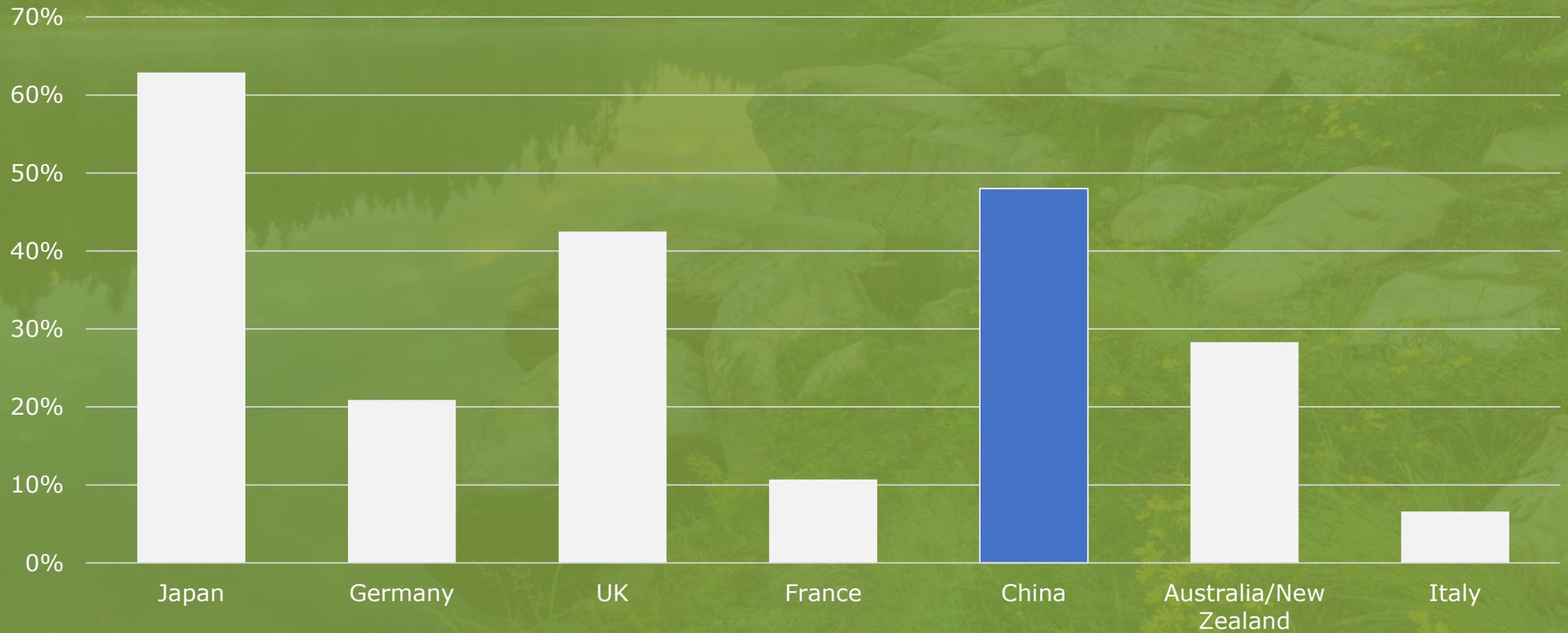
Arizona was the MAIN destination



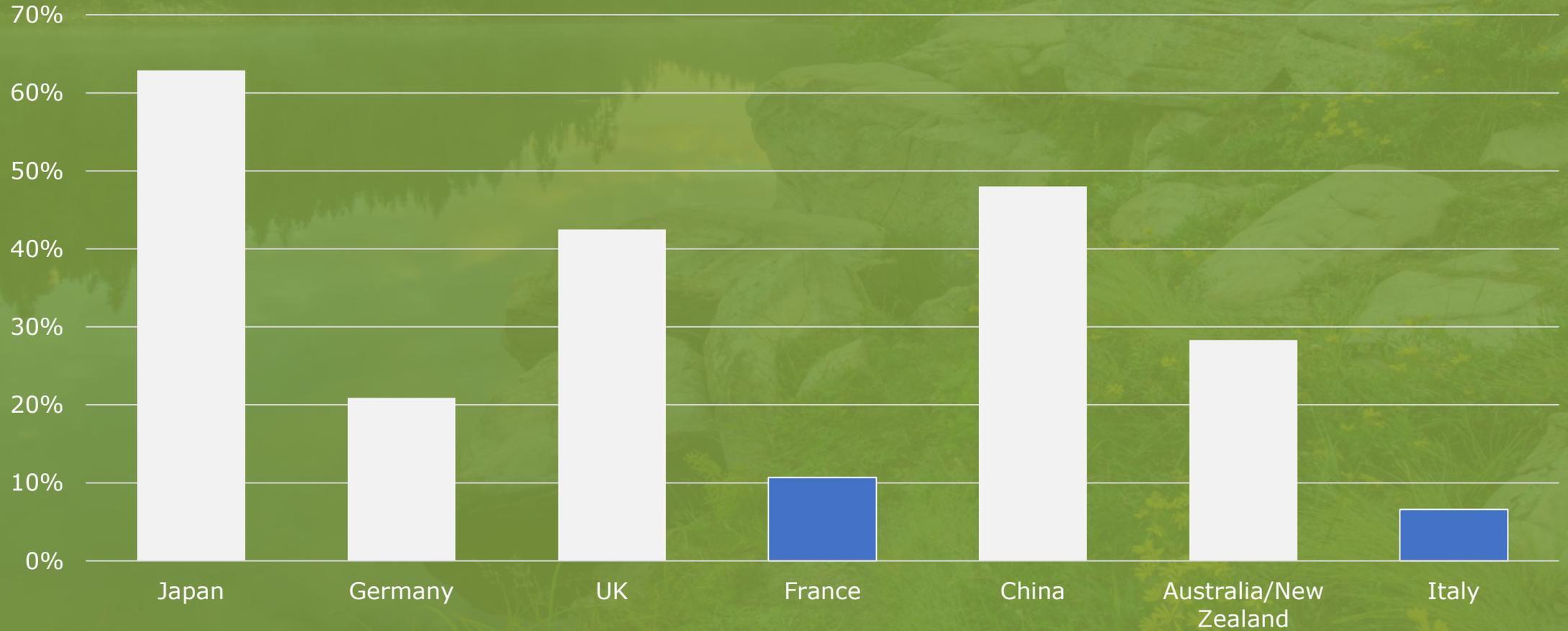
Arizona was the MAIN destination



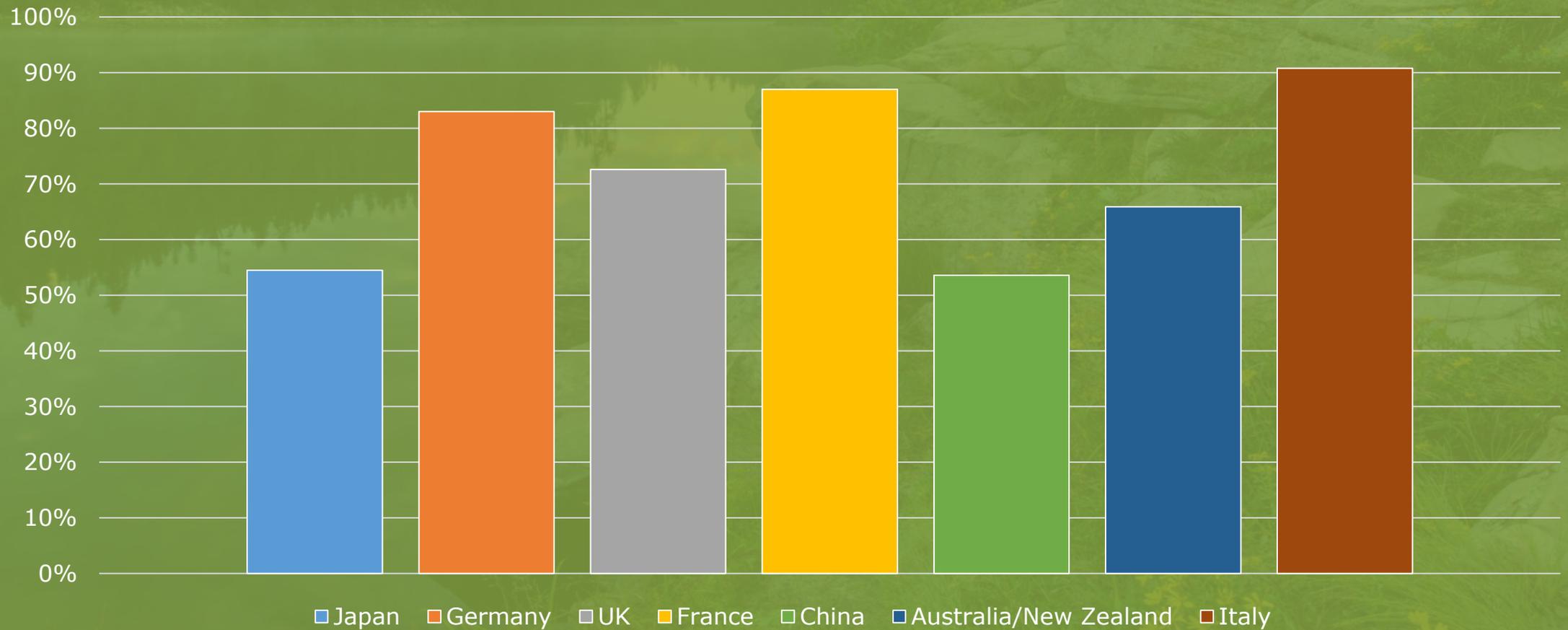
Arizona was the MAIN destination



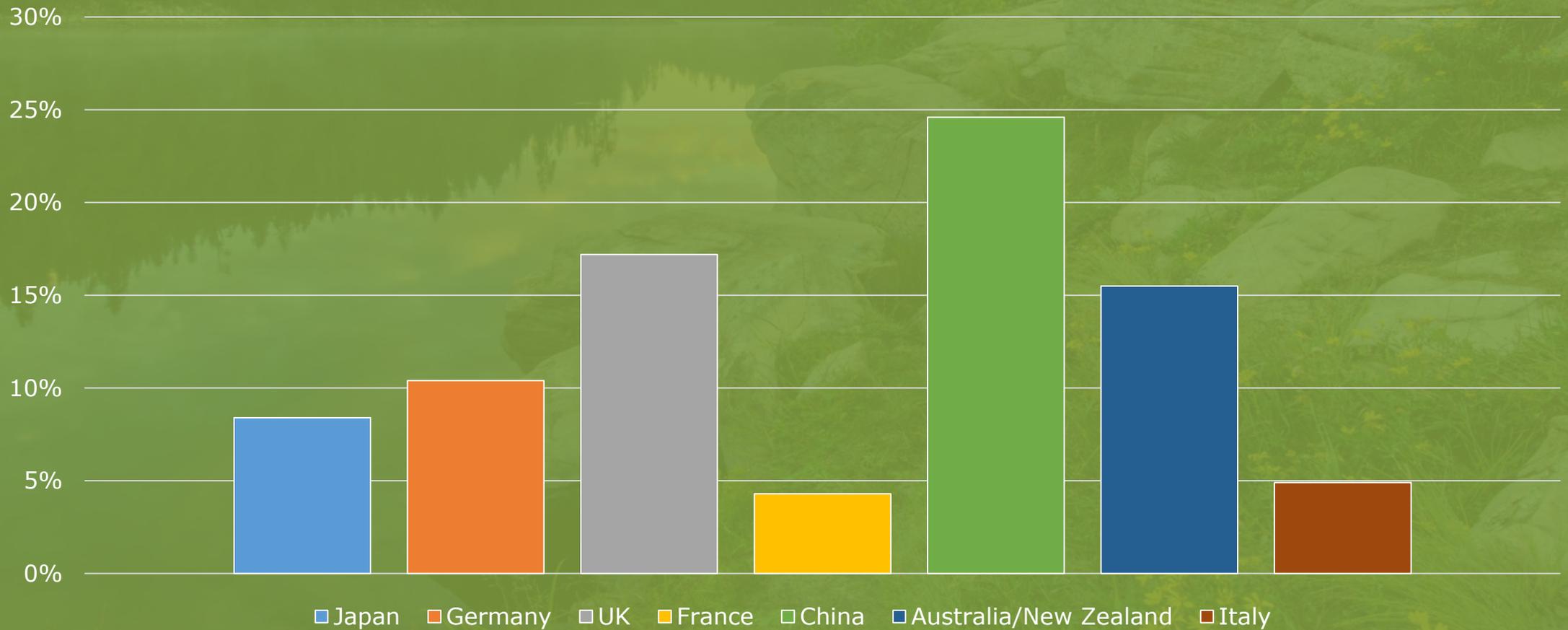
Arizona was the MAIN destination



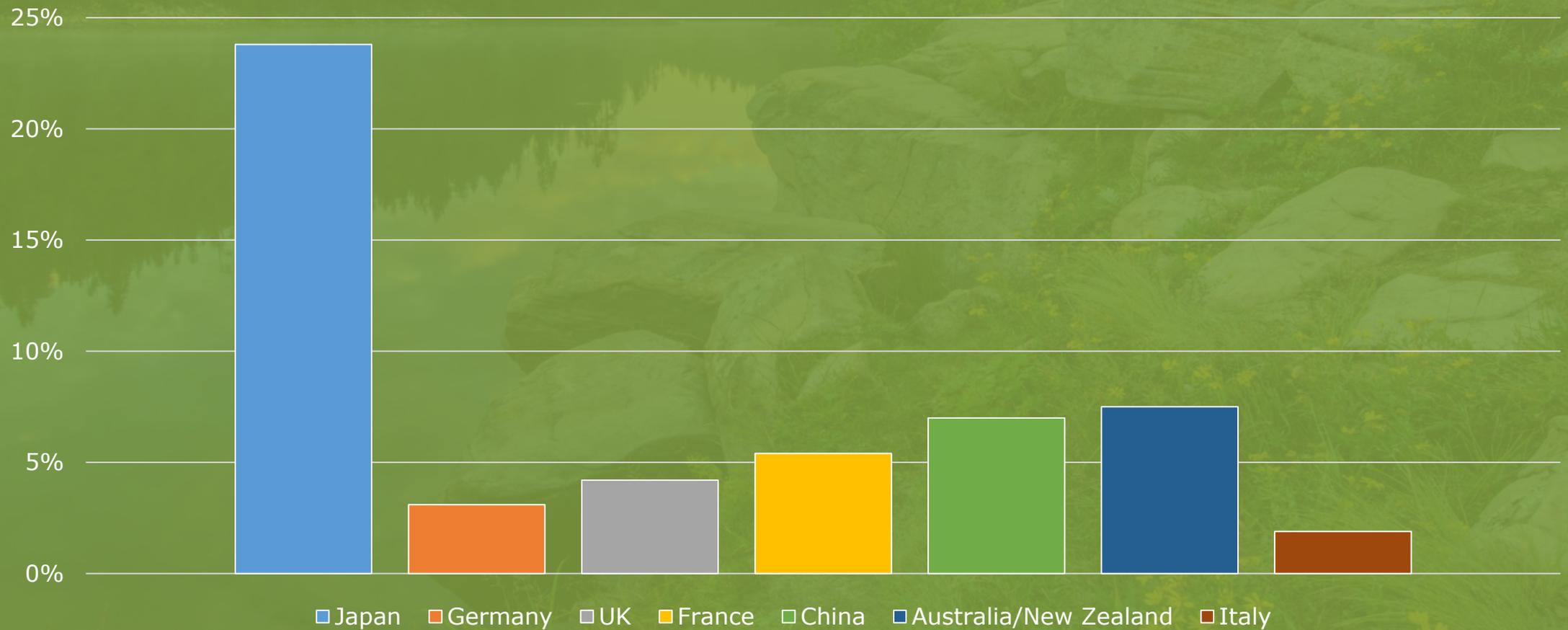
Main Purpose - Leisure



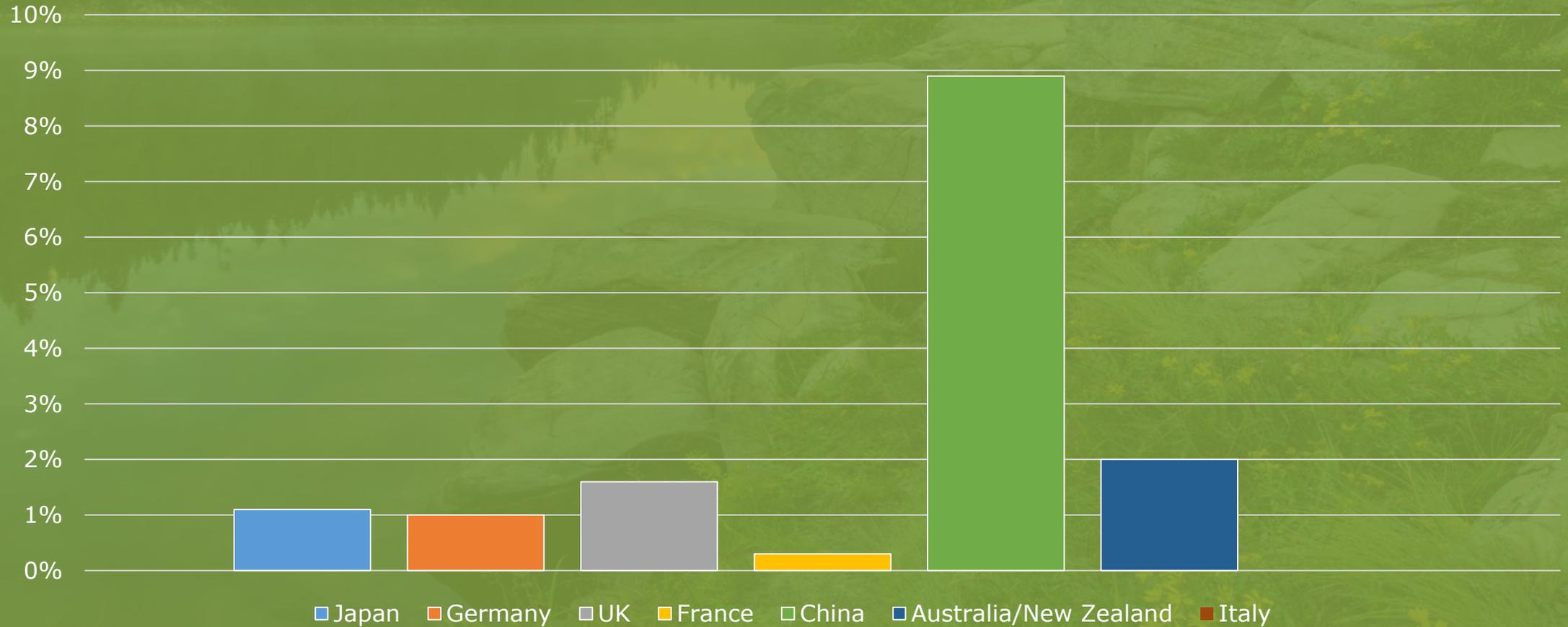
Main Purpose – Visit Friends/Family



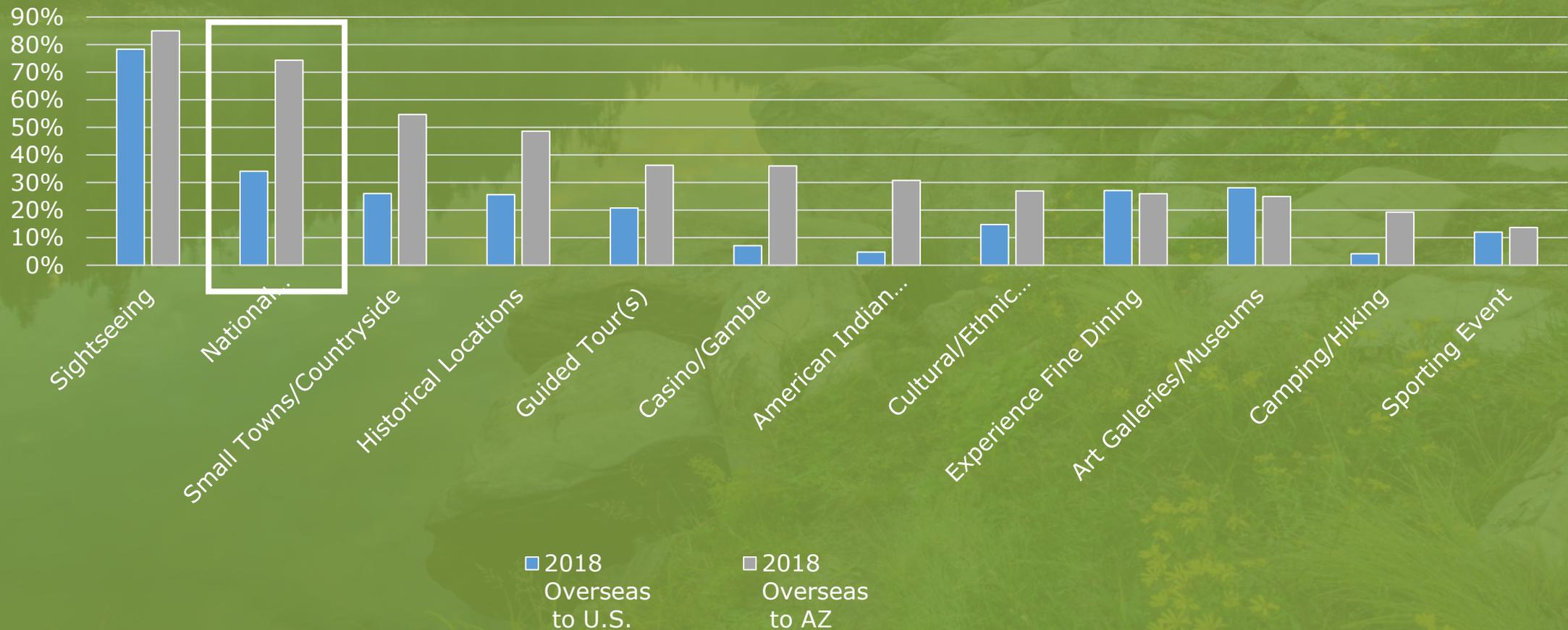
Main Purpose – Business



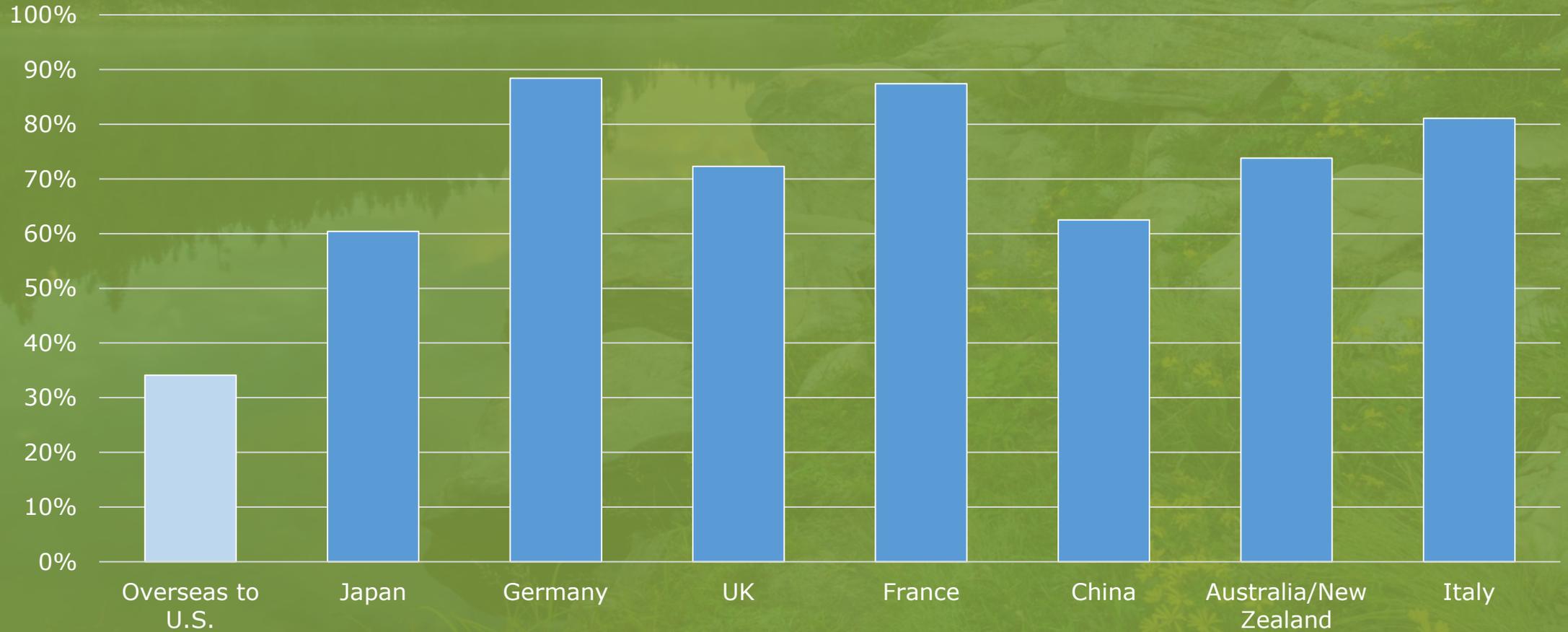
Main Purpose – Education



Activities - Overseas



National Parks/Monuments



Top Activities

Japan

- National Parks
- Guided Tours
 - Casino

Germany

- National Parks
- Small Towns/Countryside
 - Historical Locations

Top Activities

United Kingdom

- National Parks
- Small Towns/Countryside
- Historical Locations

France

- National Parks
- Amusement/Theme Parks
- Small Towns/Countryside

Top Activities

China

- Shopping
- National Parks
- Fine Dining
- Small Towns/Countryside

Australia

- National Parks
- Small Towns/Countryside
- Historical Locations

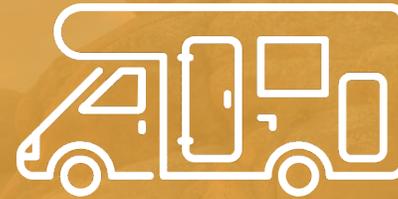


Look Ahead 2019

NATIONAL PARKS



STATE PARKS



AIRPORTS

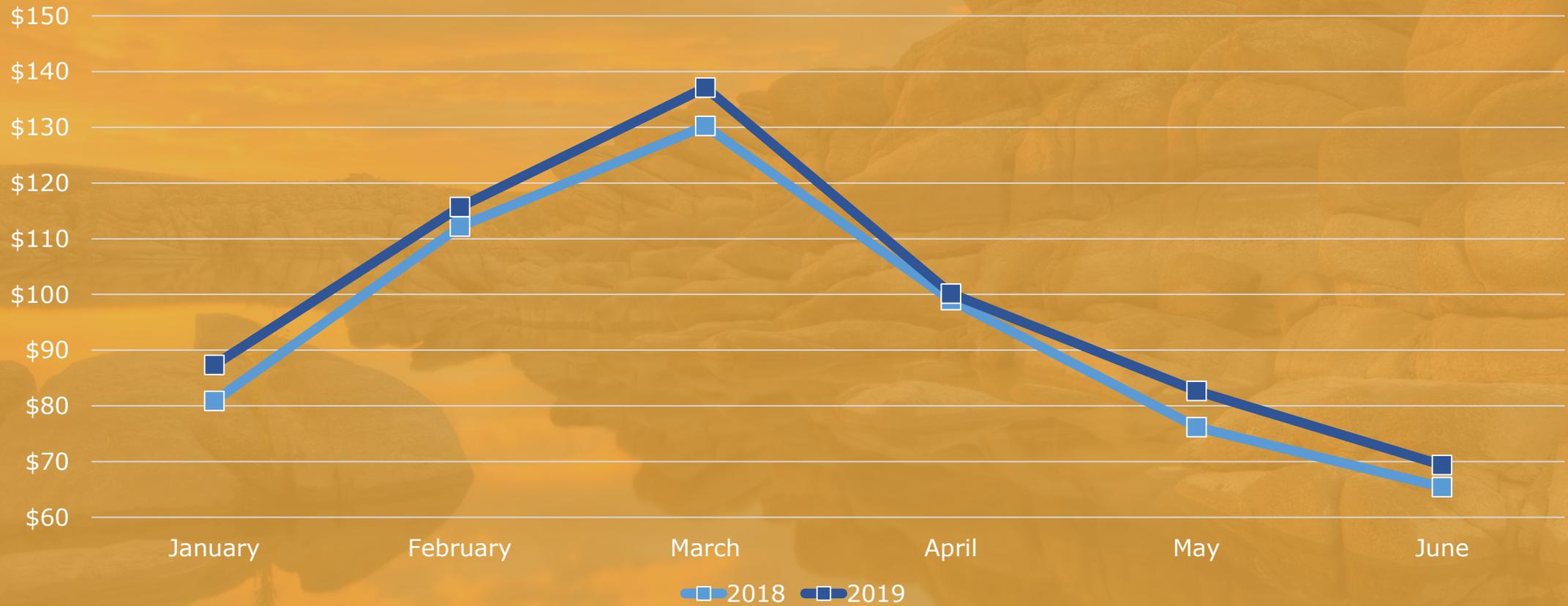


GROSS SALES



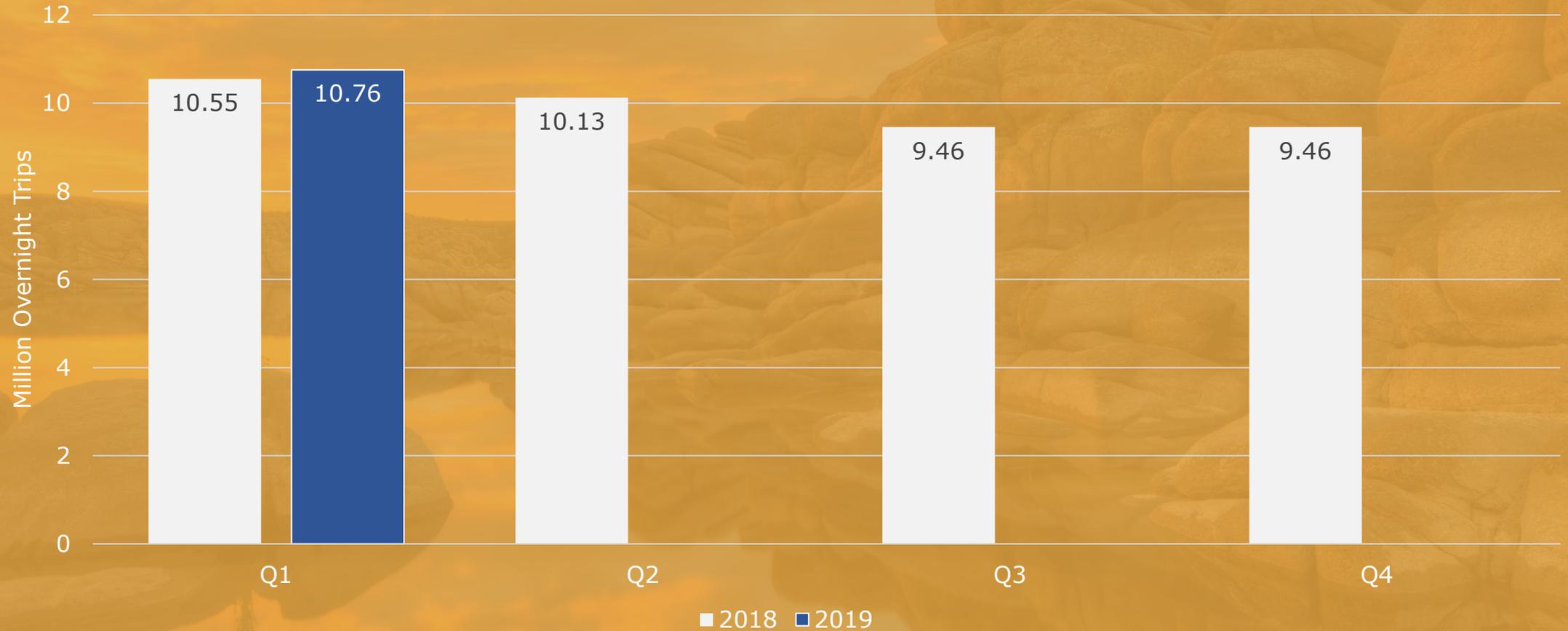


LODGING – Arizona RevPAR



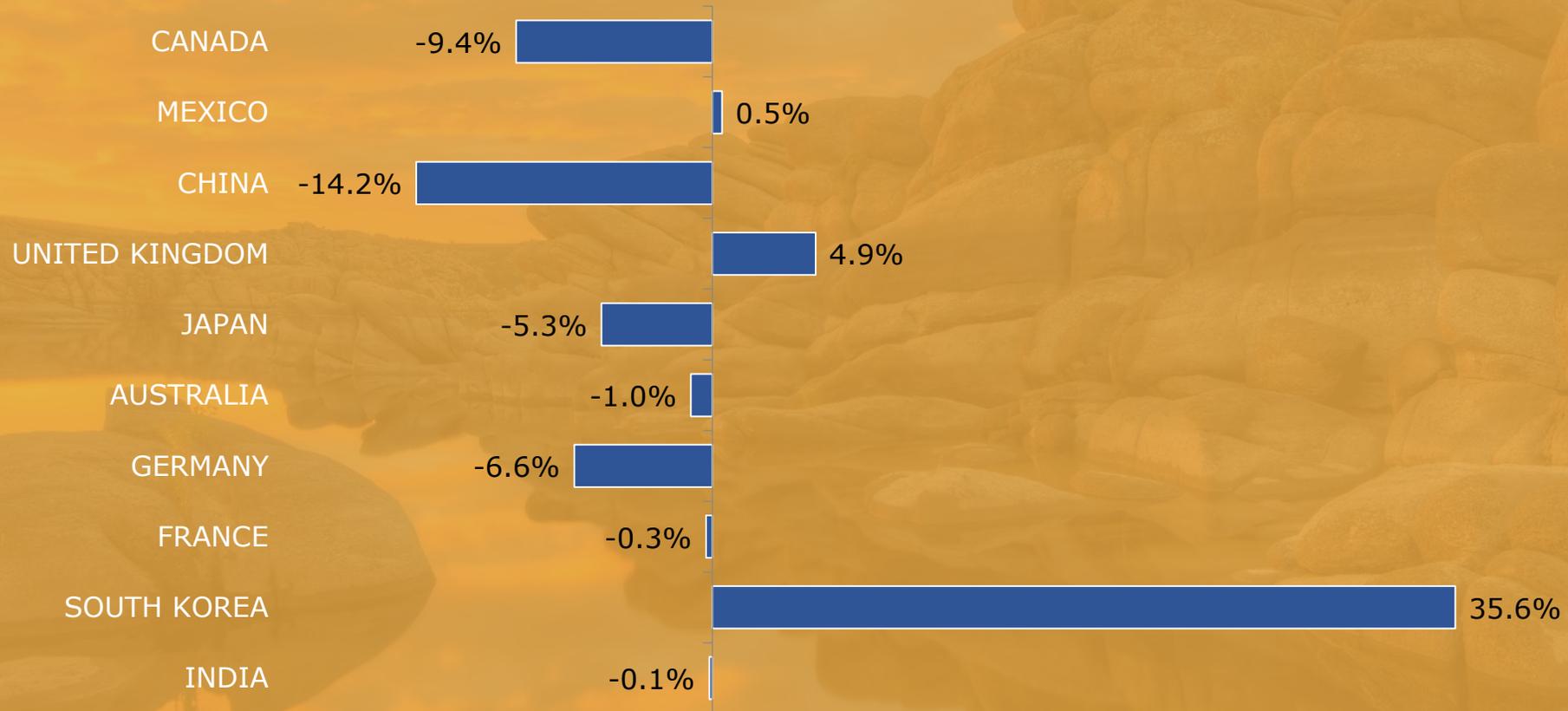


Quarterly Domestic Visitation



International Visa Card Spending

Q1 (Jan-Mar 2019)



The background of the slide is a close-up photograph of a succulent plant, likely a type of Agave or Yucca, with thick, rounded green leaves. The leaves have prominent white variegation along their edges and veins, creating a complex, organic pattern. The lighting is bright, highlighting the texture and color of the foliage.

2019/2020 Study of Mexican Visitors to Arizona

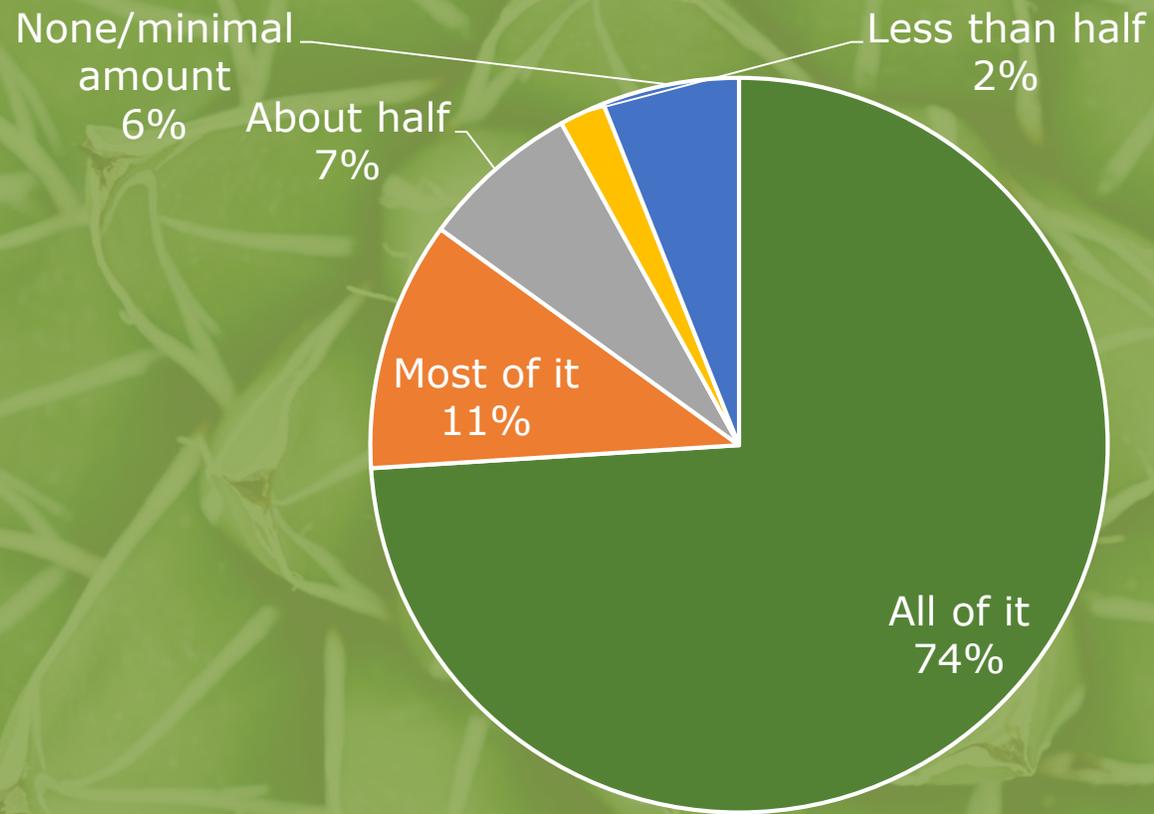


SPENDING



TRAVEL
PATTERNS

How much of your spending was done in cash?





Source: 2019/2020 Study of Mexican Visitors to Arizona



**Data
Collection**

**Data Processing &
Economic Impact
Analysis**

**Tentative
Report
Delivery**

June 2019-May 2020

**June-
July
2020**

**August
2020**