

Arizona Travel Impacts

2000-2018p



June 2019

Prepared for the

Arizona Office of Tourism
Phoenix, Arizona

Arizona Travel Impacts 2000-2018p

Arizona Office of Tourism

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Executive Summary

This report describes the economic impacts of travel to and through Arizona and the state's fifteen counties. The estimates of the direct impacts associated with traveler spending in Arizona were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The estimates for Arizona are generally comparable to the U.S. Travel and Tourism Satellite Accounts produced by the Bureau of Economic Analysis. The estimates of spending, earnings, employment and tax receipts are also used as input data to derive estimates of other economic measures, including gross domestic product (GDP) and secondary effects of the travel industry. The estimates for 2018 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 fourth 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 ninth consecutive year of industry growth.

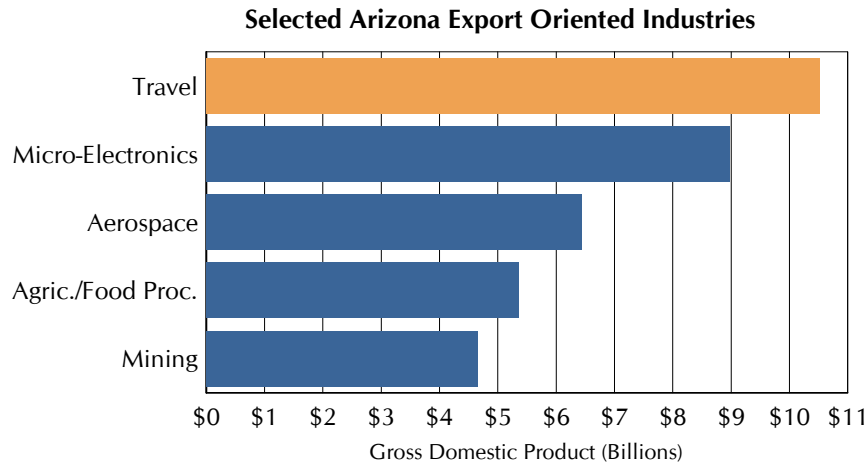
- **Spending.** Total direct travel spending in Arizona was \$24.4 billion in 2018p. Non-transportation visitor spending increased by 7.1 percent, following a 6.3 percent increase from 2016 to 2017. Real travel spending increased by 5.3 percent in 2018p.
- **Travel Activity.** Visitor air travel on domestic flights to Arizona destinations increased by 4.4 percent in 2018p, following a 5.8 percent increase the preceding year.[1] Room demand increased by 4.1 percent for 2018, following a 2.8 percent increase the preceding year.[2]
- **Employment.** Direct travel-generated employment was 192,300 in 2018p. This represents an addition of 4,100 jobs, an increase of 2.3 percent.
- **Secondary Impacts.** The re-spending of travel-related revenues by businesses and employees creates secondary impacts. In 2018p, the secondary impacts were 165,300 jobs with \$7.8 billion in earnings.
- **GDP.** The Gross Domestic Product of the travel industry was \$10.5 billion in 2018p. The travel industry and the microelectronics industry have been the top two export-oriented industries in the state in recent years.

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

[2]. STR, Inc.

The Arizona Travel Industry is a Leading Export Oriented Industry

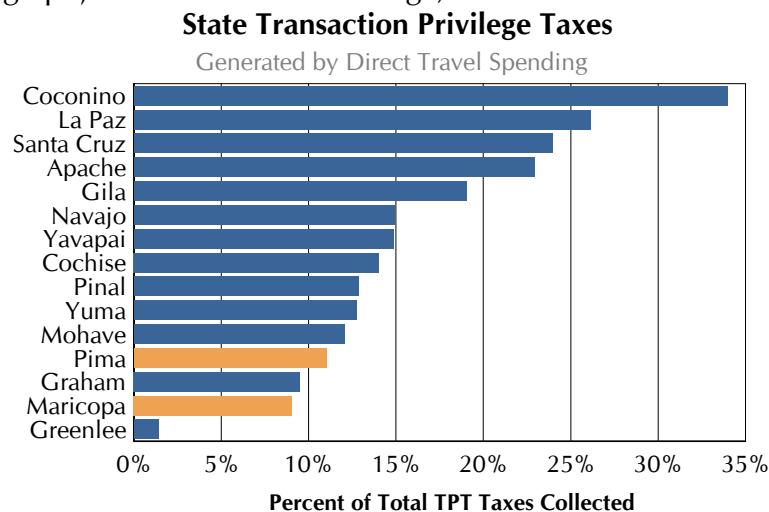
Travel and tourism is one of the most important **“export-oriented”** industries in Arizona. Spending by visitors generates sales in lodging, food services, recreation, transportation and retail businesses - the “travel industry.” These sales support jobs for Arizona residents and contribute tax revenue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



Note: Preliminary 2018 estimates by Dean Runyan Associates. Agriculture includes food and beverage processing industries.

The Travel Industry Generates Tax Benefits for Arizona Residents

In 2018p, the travel industry generated \$1,360 in local (\$417 tax receipts), state (\$378 tax receipts), and federal (\$565 tax receipts) taxes for each Arizona household. In 2018p, more than 6.5 percent of all local and state tax revenues were generated by the travel industry. The tax revenue impacts are relatively more important in non-urban counties (see graph, urban counties in orange).



Preface

The purpose of this study is to document the economic significance of the travel industry in Arizona from 2000 to 2018. These findings show the level of travel spending by visitors traveling to and within the state, and the impact this spending had on the economy in terms of earnings, employment and tax revenue.

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

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

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

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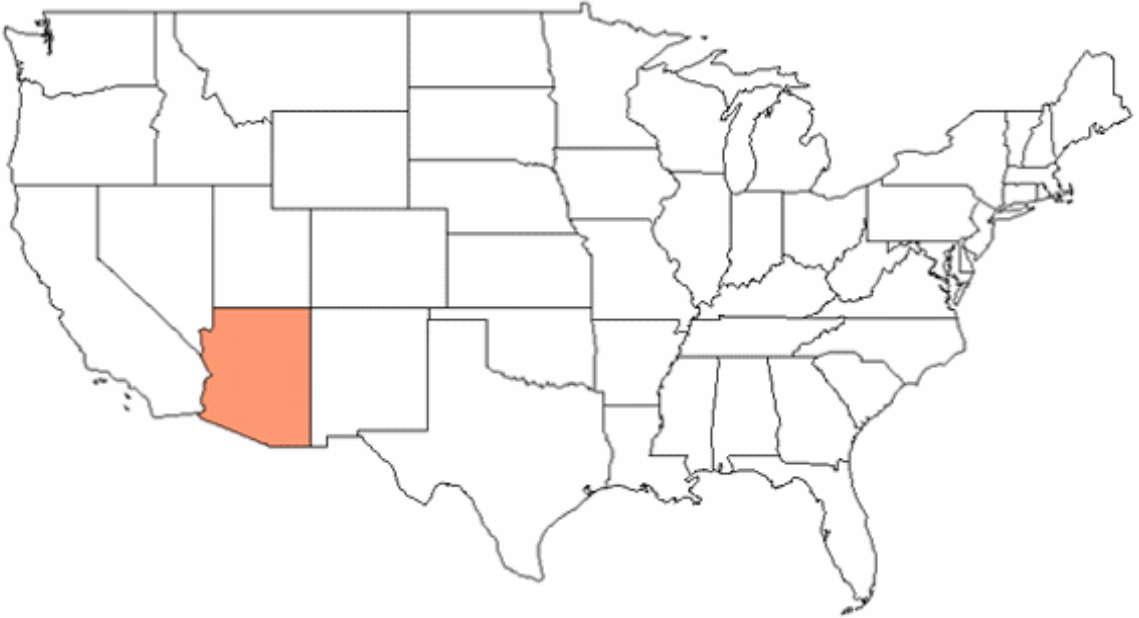
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I. ARIZONA TRAVEL



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 \$24.4 billion in 2018p. The increase of 7.8 percent was due to the increase in motor fuel prices and strong growth in commercial lodging spending. Non-transportation visitor spending increased by 7.1 percent, following a 6.3 percent increase from 2016 to 2017. Travel spending in real (inflation-adjusted) dollars has increased by 5.3 percent in 2018p.
- Lodging sales increased by 11 percent in 2018 following a 9.4 percent increase the preceding year. The strong growth in room sales over that past three 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 4.4 percent in 2018p, following a 5.9 percent increase the preceding year. Visitor air arrivals to the state have increased an average of 5.7 percent per year since 2014.
- Direct travel-generated employment was 192,300 in 2018p. This represents an addition of 4,100 jobs, an increase of 2.3 percent. (See detailed employment estimates, page 9.)
- The Gross Domestic Product of the travel industry was \$10.5 billion in 2018p. 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 2018p, the secondary impacts were 165,300 jobs with \$7.8 billion in earnings.

Travel Trends

The Arizona travel industry experienced strong growth in 2018. Travel spending increased by 7.8 percent from 2017 to 2018p, following a 6.7 percent increase the preceding year. The continued growth in motor fuel prices helped lift travel spending. Non-transportation visitor spending increased by 7.1 percent in 2018p, compared to a 6.3 percent increase the preceding year[1]. Earnings, employment and tax revenue have also experienced substantial growth over the past two years.

Direct Travel Impacts, 2000-2018p

	2000	2005	2010	2017	2018	Ave. Annual %Chg. 17-18p	00-18p
Spending (\$Billions)							
Total (Current \$)	13.7	16.9	17.8	22.7	24.4	7.8%	3.3%
Other	1.7	1.9	2.0	2.8	2.9	6.7%	3.3%
Visitor	12.1	15.0	15.7	19.9	21.5	7.9%	3.3%
Non-transportation	9.4	11.1	11.1	14.7	15.7	7.1%	2.9%
Transportation	2.7	3.9	4.6	5.2	5.8	10.3%	4.3%
Earnings (\$Billions)							
Earnings (Current \$)	3.9	4.6	5.0	7.0	7.4	6.2%	3.6%
Employment (Thousands)							
Employment	160.7	165.9	155.9	187.9	192.3	2.3%	1.0%
Tax Revenue (\$Millions)							
Total (Current \$)	1,937	2,332	2,516	3,309	3,625	9.6%	3.5%
Local	549	652	698	953	1,111	16.6%	4.0%
State	534	694	738	933	1,010	8.2%	3.6%
Federal	854	987	1,079	1,423	1,505	5.8%	3.2%

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.

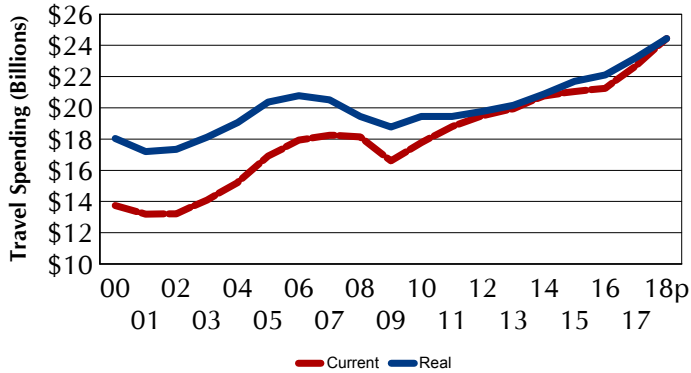
Local tax revenue includes lodging taxes, sales taxes, auto rental taxes and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

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 2009 through 2018p are shown on pages 37 through 41 of the county section.

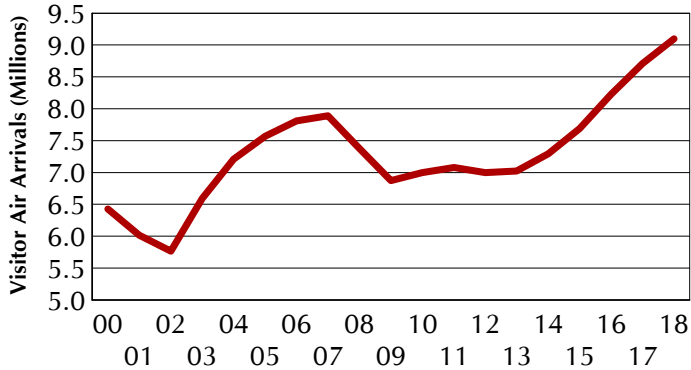
Arizona Direct Spending Real and Current Dollars



In real dollars (adjusted for inflation) Arizona travel spending increased by 5.3 percent over 2017. In current dollars, the increase was 7.8 percent.

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

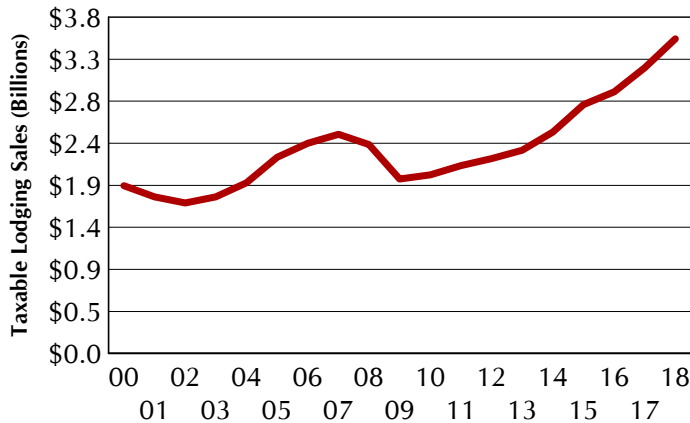
Air Passenger Visitor Arrivals to Arizona U.S. Air Carriers



Visitor air arrivals to Arizona increased by 4.4 percent from 2017 to 2018, following a 5.8 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 10.1 percent annually from 2017 to 2018 following a 9.3 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.

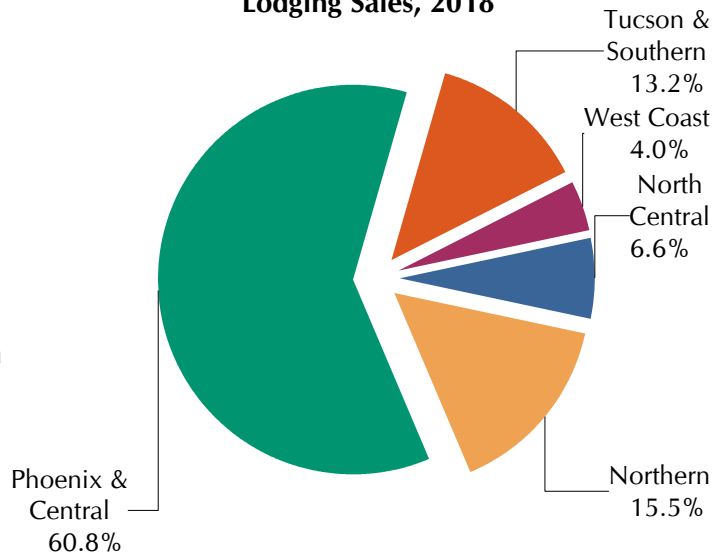
The Northern Arizona region includes Apache, Coconino and Navajo counties. The West Coast region includes La Paz, Mohave and Yuma counties. The North Central region includes Gila and Yavapai counties. The Phoenix and Central Arizona region includes Maricopa and Pinal counties. The Tucson and Southern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

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

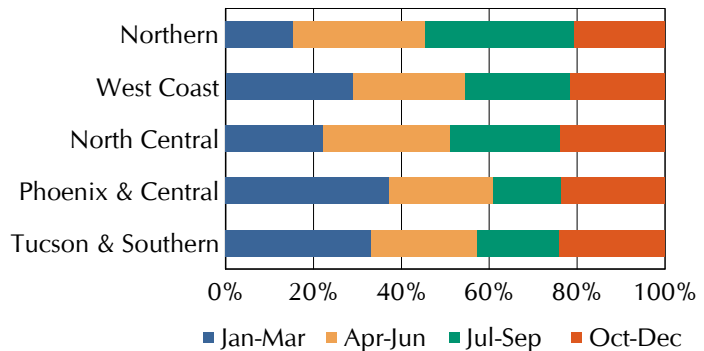
Lodging sales are greatest in the first quarter for three of Arizona's tourism regions - the West Coast, Phoenix and Tucson. By contrast, spring and summer quarters are most important for the Northern and North Central regions.

The bottom column chart provides a statewide quarterly breakout of lodging sales in two year increments beginning in 2010. Lodging sales have increased in all four quarters since the prior 2007 peak.

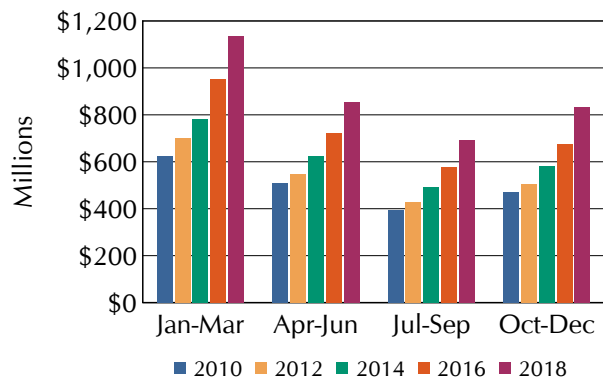
Regional Shares of Arizona Taxable Lodging Sales, 2018



Taxable Lodging Sales by Region and Quarter, 2018



Arizona Taxable Lodging Sales by Quarter



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

Visitor Origin

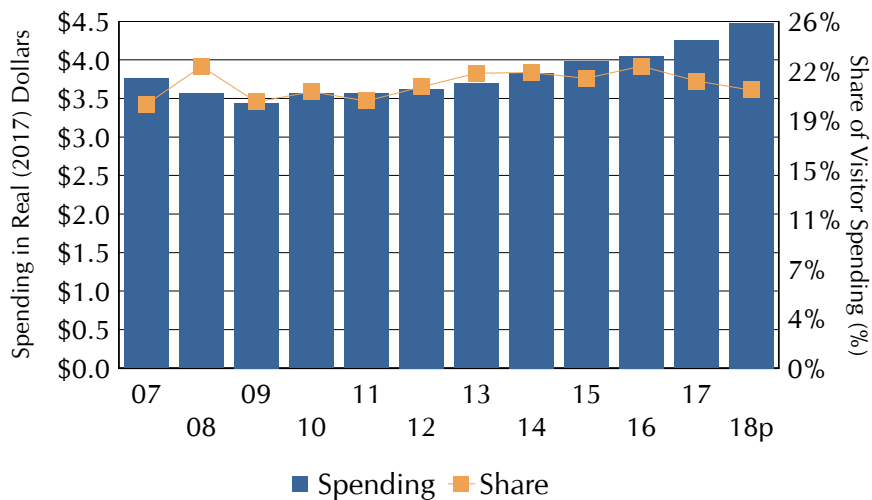
Out-of-state travelers generate more than three-fourths of the visitor impacts in Arizona. Visitors from other states are the largest segment (more than 56 percent of spending), while international travel, including day travel from Mexico, comprises approximately 20 percent of visitor impacts. The share has declined slightly in the past two years due to the decreased value of foreign currencies relative to the U.S. dollar. International data was revised in 2018, this specific breakout of economic impacts will not be comparable to prior reports.

Arizona Travel Impacts by Origin of Visitor, 2018p

Origin	Spending (\$Billions)	Earnings (\$Billions)	Employment (Thousands)	Tax Receipts (\$Millions)	
				Local/State	Federal
All Visitors	21.5	6.3	176.6	2,094	1,325
Arizona	4.4	1.1	33.1	408	227
Other U.S.	12.6	4.0	108.1	1,243	898
International	4.5	1.2	35.3	444	200
Other Travel	2.9	1.1	15.7	26	181
Total Travel	24.4	7.4	192.3	2,120	1,506

Sources: Dean Runyan Associates, Toursim Economics, OmniTrak TravelTrakAmerica 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

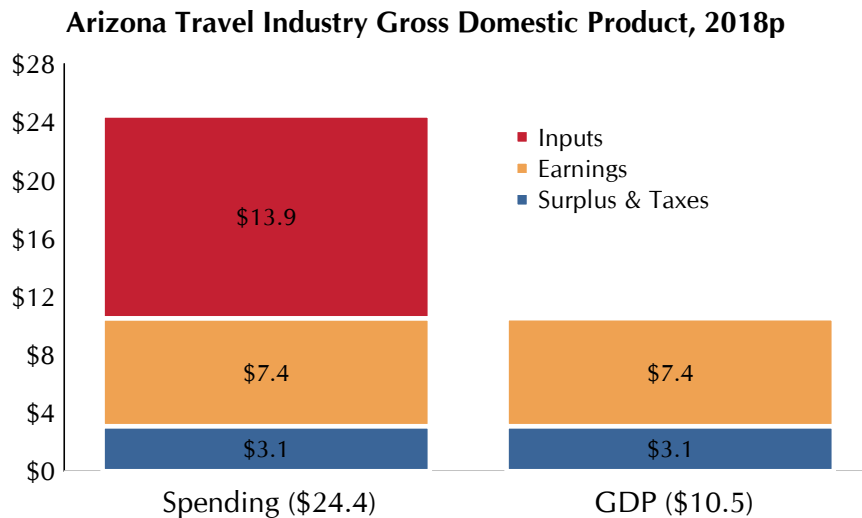


Sources: See above chart for source of international estimates. See first graph on preceding page for constant dollar estimates. Constant dollar visitor spending does not include "Other Travel."

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 \$10.5 billion in 2018p. Arizona travel industry GDP represents about 3.0 percent of total state GDP in recent years.

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



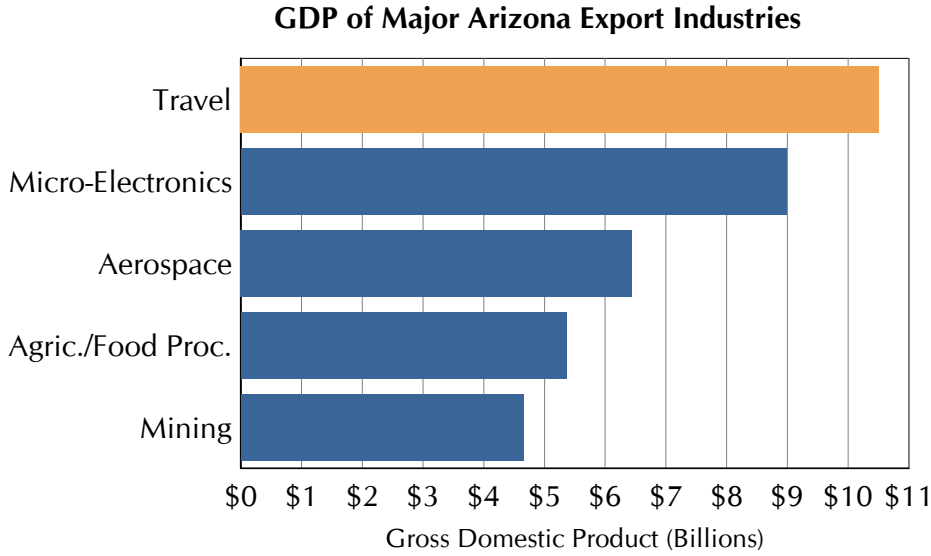
Sources: Dean Runyan Associates, Bureau of Economic Analysis, and Implan Group, LLC. Details may not add to totals due to rounding.

[2]. About 40 percent of the \$13.9 billion of inputs and goods resold are purchased from other Arizona businesses.

Gross Domestic Product of Arizona Export-Oriented Industries

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

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



Source: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. 2018 estimates for non-travel industries based on 2017 GDP and 2018 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:

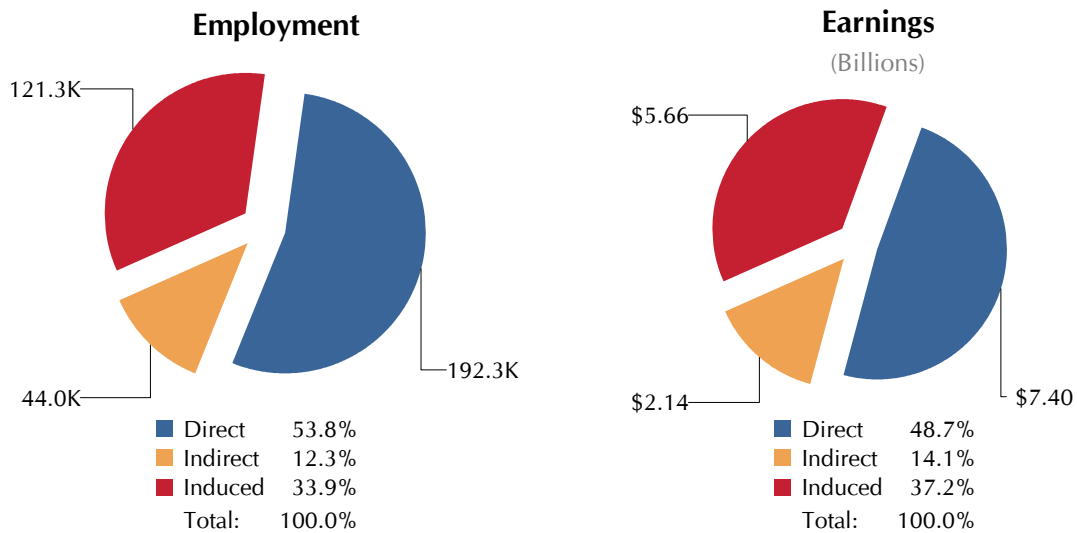
- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Trade**
- **Transportation**

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** (35,600 jobs and \$2.4 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** (14,700 jobs and \$530 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** (26,600 jobs and \$1.7 billion earnings). Employees of travel-related businesses pay fees to attend public educational institutions and to operate motor vehicles.
- **Finance, Insurance and Real Estate** (12,300 jobs and \$690 million earnings). Employees and businesses use the services of financial institutions, insurers and real estate businesses.

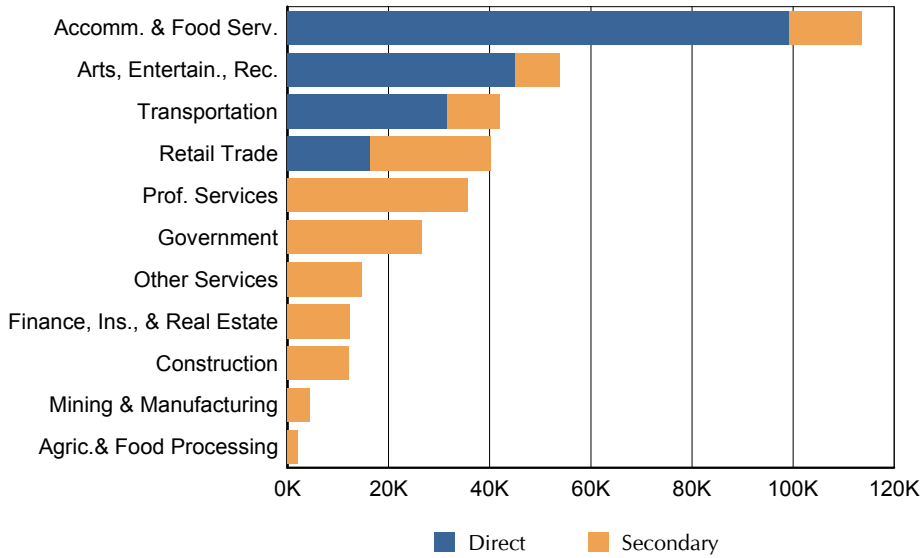
Total Employment and Earnings Generated by Travel Spending in Arizona, 2018p



Sources: Dean Runyan Associates with IMPLAN GROUP, LLC. Total employment was 357,600 jobs. The employment multiplier for 2018 is 1.86 (357.64/192.32). Total earnings were \$15.19 Billion. The earnings multiplier is 2.05 (15.19/7.40).

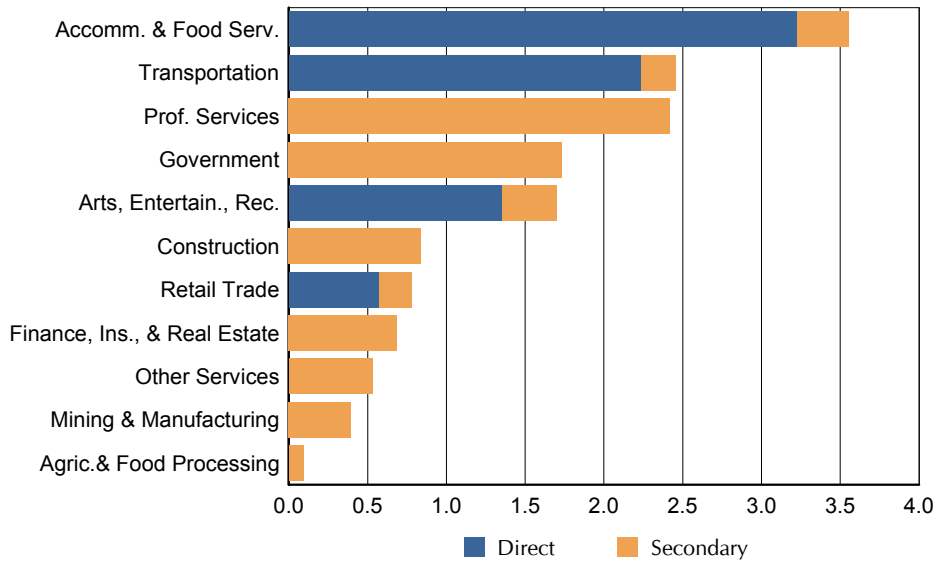
Direct and Secondary Employment

Generated by Travel Spending in Arizona



Direct and Secondary Earnings

Generated by Travel Spending in Arizona



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

Direct and Secondary Travel-Generated Earnings in Arizona, 2018p
(\$Million)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accomm. & Food Serv.	3,229	100	226	326	3,555
Arts, Entertain., Rec.	1,356	269	76	345	1,702
Retail Trade	574	17	192	210	783
Transportation	2,238	169	50	219	2,457
Agric.& Food Processing		44	49	92	92
Construction		66	771	837	837
Finance, Ins., & Real Estate		240	448	688	688
Government		116	1,618	1,734	1,734
Mining & Manufacturing		149	245	394	394
Other Services		255	275	530	530
Prof. Services		713	1,706	2,419	2,419
All Industries	7,397	2,139	5,656	7,795	15,191

Direct and Secondary Travel-Generated Employment in Arizona, 2018p
(thousand jobs)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accomm. & Food Serv.	99.3	4.4	9.9	14.4	113.7
Arts, Entertain., Rec.	45.0	6.3	2.6	8.9	53.9
Retail Trade	16.4	3.4	20.5	23.9	40.3
Transportation	31.6	5.7	4.7	10.4	41.9
Agric.& Food Processing		1.0	1.1	2.1	2.1
Construction		1.0	11.2	12.2	12.2
Finance, Ins., & Real Estate		4.5	7.8	12.3	12.3
Government		1.3	25.4	26.6	26.6
Mining & Manufacturing		1.6	2.7	4.3	4.3
Other Services		5.9	8.9	14.7	14.7
Prof. Services		9.0	26.6	35.6	35.6
All Industries	192.3	44.0	121.3	165.3	357.6

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 2009 through 2018 follow:

Arizona Direct Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Billion)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	14.7	16.7	17.1	17.5	18.2	18.5	18.6	19.9	21.5
Other Travel*	1.9	2.1	2.4	2.5	2.6	2.6	2.6	2.8	2.9
Total	16.6	18.8	19.5	19.9	20.8	21.0	21.2	22.7	24.4
Visitor Spending by Type of Traveler Accommodation (\$Billion)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	6.5	7.4	7.7	7.9	8.4	8.9	9.2	9.9	10.9
Private Home	3.6	4.2	4.2	4.3	4.4	4.4	4.4	4.6	4.9
Campground	0.6	0.7	0.7	0.7	0.7	0.7	0.6	0.7	0.7
Vacation Home	0.6	0.7	0.7	0.7	0.7	0.7	0.7	0.8	0.8
Day Travel	3.4	3.6	3.8	3.8	3.9	3.7	3.6	3.9	4.1
Total	14.7	16.7	17.1	17.5	18.2	18.5	18.6	19.9	21.5
Visitor Spending by Commodity Purchased (\$Billion)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	2.3	2.5	2.6	2.7	3.0	3.3	3.5	3.8	4.1
Food Service	3.2	3.5	3.6	3.7	3.9	4.2	4.4	4.7	5.1
Food Stores	0.9	0.9	0.9	0.9	1.0	1.0	1.0	1.0	1.0
Local Tran. & Gas	2.6	3.6	3.8	3.7	3.8	3.2	2.9	3.2	3.6
Arts, Ent. & Rec.	2.0	2.1	2.1	2.2	2.2	2.3	2.4	2.5	2.6
Retail Sales	2.4	2.4	2.5	2.5	2.6	2.6	2.6	2.7	2.8
Visitor Air Tran.	1.4	1.6	1.6	1.6	1.8	1.9	1.9	2.0	2.1
Total	14.7	16.7	17.1	17.5	18.2	18.5	18.6	19.9	21.5
Industry Earnings Generated by Travel Spending (\$Billion)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	2.0	2.1	2.2	2.3	2.5	2.7	2.8	3.0	3.2
Arts, Ent. & Rec.	0.9	0.9	1.0	1.0	1.1	1.1	1.2	1.3	1.4
Retail**	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6
Ground Tran.	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.6	0.6	0.6	0.6	0.6	0.7	0.7	0.8	0.8
Other Travel*	0.7	0.8	0.9	1.0	1.0	1.0	1.0	1.1	1.1
Total	4.9	5.2	5.4	5.5	5.8	6.2	6.5	7.0	7.4
Industry Employment Generated by Travel Spending (Thousand Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	80.9	82.1	83.2	86.1	88.7	92.2	95.1	97.0	99.3
Arts, Ent. & Rec.	35.4	35.6	36.6	37.3	39.7	41.3	41.9	43.1	45.0
Retail**	17.3	16.8	16.6	16.9	17.6	18.1	18.4	18.4	18.4
Ground Tran.	3.6	3.6	3.7	3.8	3.9	4.1	4.4	4.9	5.1
Visitor Air Tran.	7.4	7.4	7.5	7.2	7.6	8.1	8.2	8.4	8.7
Other Travel*	13.0	13.2	14.9	14.3	15.3	15.7	16.1	16.1	15.7
Total	157.7	158.7	162.5	165.6	172.7	179.5	184.2	187.9	192.3
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	676	727	735	756	787	856	893	953	1,111
State Tax Receipts	685	801	825	805	796	839	859	933	1,010
Federal Tax Receipts	1,044	1,028	1,057	1,172	1,230	1,304	1,341	1,423	1,505
Total	2,405	2,556	2,617	2,733	2,814	2,999	3,093	3,309	3,625

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.

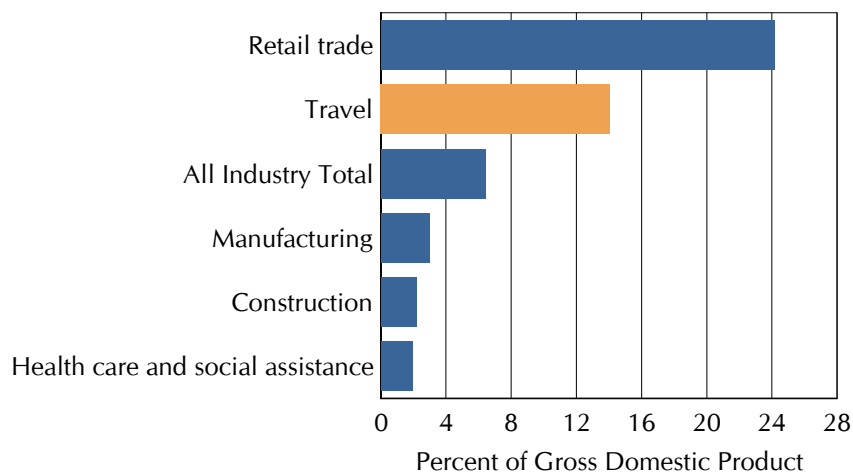
II. STATE AND LOCAL GOVERNMENT REVENUE

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, 2018p 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.

For non travel industries TOPI estimated from 2017 data.

	GDP	*TOPI	Percent
Construction	16,730	369	2.2%
Health Care	29,972	592	2.0%
Manufacturing	29,863	894	3.0%
Retail Trade	24,679	5,965	24.2%
Travel	10,491	1,474	14.1%
All Industries	346,792	22,257	6.4%

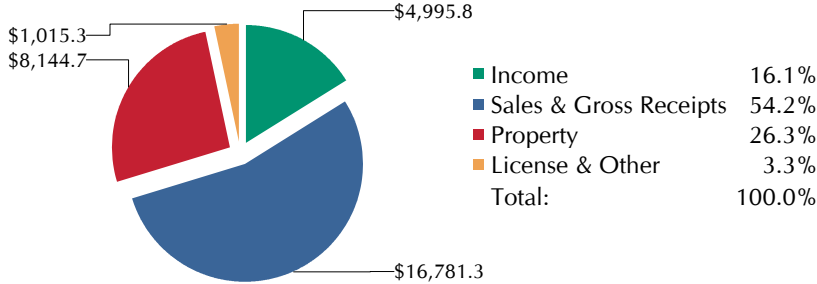
The remainder of this report will focus on the travel industry and the specific tax contributions made to state and local government in Arizona. In addition to the taxes on production discussed in the previous section, the tax payments of travel industry employees derived from the income earned from 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
2017-2018 Fiscal Year (\$Millions)



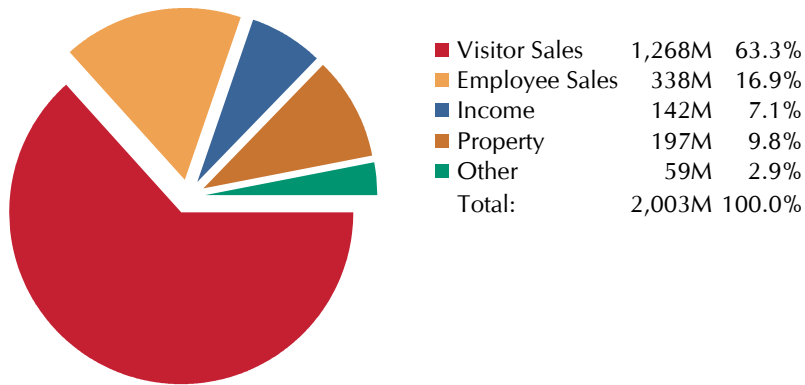
Sources: The 2017-18 fiscal year estimates of state and local tax revenues in Arizona were prepared by Dean Runyan Associates from various sources, including the Bureau of the Census (State and Local Government Finance), the Arizona Department of Revenue, the Bureau of Economic Analysis and a selection 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 2017-18 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
2017-2018 Fiscal Year (\$Million)



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

Whereas slightly about one-half of all state and local tax revenue in Arizona was attributable to sales tax collections in the 2017-18 fiscal year, 80 percent of all travel industry tax revenue was attributable to sales tax receipts from visitors (63 percent) and the purchases of employees in the travel industry (17 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 6.5 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

2017-2018 Fiscal Year (\$Million)

(July 1 thru June 30)

Type	Total	Travel Generated	Percent Travel
Sales & Gross Receipts	\$16,781	\$1,604	9.6%
Property	\$8,145	\$197	2.4%
Income	\$4,996	\$142	2.8%
License & Other	\$1,015	\$59	5.8%
Total Tax Receipts	\$30,937	\$2,001	6.5%

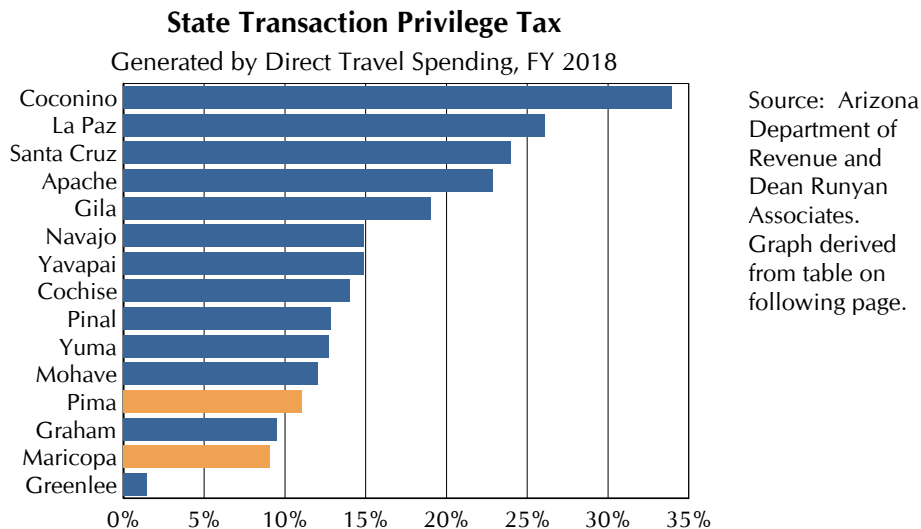
Source: Dean Runyan Associates and Bureau of the Census, State and Local Government Finance.

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 6.5 percent of tax revenue in the 2018 fiscal year (July 1 thru June 30).
- Eighty percent of all travel-generated tax revenue is attributable to sales and gross receipts taxes.
- A majority of these tax revenues are borne by visitors who reside in other states and countries.

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



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

**State Transaction Privilege Taxes Generated
by Direct Travel Spending, FY 2018 (July 1 thru June 30)**
(\$Millions)

	Total	Travel	Percent
Apache	14.7	3.4	22.9%
Cochise	71.9	10.1	14.0%
Coconino	168.9	57.4	34.0%
Gila	33.8	6.4	19.1%
Graham	21.6	2.1	9.5%
Greenlee	29.8	0.4	1.4%
La Paz	14.4	3.8	26.1%
Maricopa	4,250.8	384.7	9.0%
Mohave	152.0	18.3	12.0%
Navajo	74.4	11.1	14.9%
Pima	805.7	88.9	11.0%
Pinal	171.4	22.0	12.8%
Santa Cruz	27.0	6.5	24.0%
Yavapai	189.6	28.2	14.9%
Yuma	132.6	16.9	12.7%
Arizona	6,158.6	660.0	10.7%

State and Local Travel-Generated Tax Revenue per Household
2018p Calendar Year

	Tax Revenue (\$Millions)			Households (Thousands)	Tax Revenue per Household
	Local	State	Total		
Apache	\$4.0	\$5.9	\$9.9	22.8	\$440
Cochise	\$14.0	\$15.0	\$28.9	48.9	\$590
Coconino	\$79.1	\$67.9	\$147.0	49.6	\$2,970
Gila	\$9.9	\$13.7	\$23.6	22.1	\$1,060
Graham	\$2.7	\$3.0	\$5.7	11.4	\$500
Greenlee	\$0.2	\$0.7	\$0.9	3.6	\$250
La Paz	\$6.2	\$7.2	\$13.5	9.5	\$1,420
Maricopa	\$773.0	\$602.3	\$1,375.3	1,627.5	\$850
Mohave	\$25.2	\$29.4	\$54.6	86.3	\$630
Navajo	\$14.8	\$16.7	\$31.5	36.6	\$860
Pima	\$76.6	\$132.2	\$208.8	411.3	\$510
Pinal	\$27.2	\$35.3	\$62.5	148.0	\$420
Santa Cruz	\$7.8	\$9.5	\$17.3	15.1	\$1,140
Yavapai	\$46.4	\$41.9	\$88.3	99.9	\$880
Yuma	\$23.4	\$28.9	\$52.2	69.7	\$750
Arizona	\$1,110.7	\$1,009.5	\$2,120.2	2,662.4	\$800

III: REGIONAL TRAVEL IMPACTS 2009-2018p



*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, 2018p
(*\$Million*)

	Travel Spending				Tax Revenue		
	Total	Visitor*	Earn	Employ.	Local	State	Total
Northern Arizona	\$2,031	\$1,940	\$585	19,360	\$98	\$91	\$189
West Coast Arizona	\$1,444	\$1,326	\$406	14,710	\$55	\$65	\$120
North Central Arizona	\$1,246	\$1,165	\$351	12,790	\$56	\$56	\$112
Phoenix & Central Arizona	\$16,067	\$12,637	\$5,148	114,370	\$800	\$638	\$1,438
Tucson & Southern Arizona	\$3,658	\$3,060	\$907	31,080	\$101	\$160	\$262
Arizona	\$24,446	\$20,128	\$7,397	192,320	\$1,111	\$1,010	\$2,120

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, 2018p

	Employment (Thousand)			Earnings (\$Million)		
	Total	Travel	Percent Travel	Total	Travel	Percent Travel
Northern Arizona	155.5	19.4	12.5%	\$6,260	\$585	8.3%
West Coast Arizona	170.5	14.7	8.6%	\$7,714	\$406	4.6%
North Central Arizona	124.5	12.8	10.3%	\$4,546	\$351	6.8%
Phoenix & Central Arizona	2,784.1	114.4	4.1%	\$142,916	\$5,148	3.2%
Tucson & Southern Arizona	611.7	31.1	5.1%	\$28,750	\$907	2.8%
Arizona	3,846.2	192.3	5.0%	\$190,186	\$7,397	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, 2009-2018p
(\$Millions)

Northern Arizona											
	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	1,261	1,411	1,483	1,510	1,598	1,653	1,733	1,898	2,031	7.0%	5.4%
Visitor Spending	1,201	1,325	1,383	1,408	1,497	1,567	1,658	1,815	1,940	6.9%	5.5%
Non-transportation	1,071	1,131	1,180	1,209	1,294	1,397	1,504	1,637	1,745	6.6%	5.6%
Transportation	130	195	204	200	203	169	154	178	194	9.2%	4.6%
West Coast Arizona											
	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	1,229	1,335	1,353	1,360	1,373	1,287	1,275	1,381	1,444	4.5%	1.8%
Visitor Spending	1,123	1,191	1,206	1,211	1,221	1,194	1,191	1,272	1,326	4.3%	1.9%
Non-transportation	986	991	1,003	1,011	1,027	1,038	1,054	1,117	1,156	3.5%	1.8%
Transportation	137	200	203	200	194	156	136	155	170	9.8%	2.4%
North Central Arizona											
	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	831	923	973	996	1,024	1,026	1,042	1,143	1,246	9.0%	4.6%
Visitor Spending	776	850	898	920	947	975	996	1,085	1,165	7.4%	4.6%
Non-transportation	699	732	772	797	826	877	911	988	1,056	7.0%	4.7%
Transportation	78	118	126	123	121	98	85	97	109	12.2%	3.8%
Phoenix & Central Arizona											
	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	10,155	11,863	12,219	12,638	13,264	13,636	13,891	14,711	16,067	9.2%	5.2%
Visitor Spending	7,990	9,130	9,290	9,582	10,140	10,639	10,954	11,580	12,637	9.1%	5.2%
Non-transportation	5,881	6,500	6,641	6,858	7,269	7,783	8,129	8,574	9,337	8.9%	5.3%
Transportation	2,109	2,630	2,649	2,724	2,870	2,856	2,825	3,006	3,300	9.8%	5.1%
Tucson & Southern Arizona											
	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	3,102	3,267	3,461	3,432	3,503	3,432	3,305	3,545	3,658	3.2%	1.8%
Visitor Spending	2,630	2,668	2,771	2,805	2,874	2,861	2,756	2,957	3,060	3.5%	1.7%
Non-transportation	2,137	2,071	2,161	2,206	2,266	2,299	2,232	2,386	2,449	2.6%	1.5%
Transportation	494	597	609	598	608	562	524	571	611	7.0%	2.4%

Details may not add to totals due to rounding.

Arizona Regional Travel-Generated Earnings, 2009-2018p

(\$Millions)

	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Northern Arizona	366	384	401	414	443	471	500	553	585	5.9%	5.4%
West Coast Arizona	308	300	301	306	323	334	354	385	406	5.3%	3.1%
North Central Arizona	227	218	231	242	259	276	294	320	351	9.7%	5.0%
Phoenix & Central Arizona	3,289	3,588	3,716	3,854	4,020	4,309	4,478	4,816	5,148	6.9%	5.1%
Tucson & Southern Arizona	685	685	744	730	781	826	838	894	907	1.5%	3.2%
Arizona	4,874	5,176	5,393	5,546	5,827	6,216	6,464	6,968	7,397	6.2%	4.7%

Arizona Regional Travel-Generated Employment, 2009-2018p

(Thousands)

	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Northern Arizona	15.7	16.1	16.2	16.6	17.2	17.6	18.3	19.0	19.4	1.9%	2.3%
West Coast Arizona	13.6	13.3	13.2	13.1	13.5	14.0	14.4	14.5	14.7	1.4%	0.9%
North Central Arizona	10.6	10.1	10.4	10.5	11.2	11.5	12.0	12.4	12.8	3.1%	2.1%
Phoenix & Central Arizona	88.5	90.8	93.0	95.8	100.2	105.2	108.1	110.6	114.4	3.4%	2.9%
Tucson & Southern Arizona	29.2	28.4	29.7	29.5	30.6	31.1	31.3	31.4	31.1	-1.0%	0.7%
Arizona	157.7	158.7	162.5	165.6	172.7	179.5	184.2	187.9	192.3	2.3%	2.2%

Travel-Generated Employment, 2018p



North Central Arizona	6.7%
Northern Arizona	10.1%
Phoenix & Central Arizona	59.5%
Tucson & Southern Arizona	16.2%
West Coast Arizona	7.7%
Total:	100.0%

Travel-Generated Earnings, 2018p



North Central Arizona	4.7%
Northern Arizona	7.9%
Phoenix & Central Arizona	69.6%
Tucson & Southern Arizona	12.3%
West Coast Arizona	5.5%
Total:	100.0%

Northern Arizona Travel Impacts
2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	1,201	1,325	1,383	1,408	1,497	1,567	1,658	1,815	1,940
Other Travel*	60	86	99	102	101	87	75	84	91
Total	1,261	1,411	1,483	1,510	1,598	1,653	1,733	1,898	2,031

Visitor Spending by Type of Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	727	795	840	863	934	1,007	1,088	1,214	1,308
Private Home	133	157	161	159	163	158	157	163	164
Campground	45	50	50	50	49	47	47	49	51
Vacation Home	87	92	94	95	97	97	99	100	103
Day Travel	208	230	238	242	253	258	267	290	313
Total	1,201	1,325	1,383	1,408	1,497	1,567	1,658	1,815	1,940

Visitor Spending by Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	332	361	381	398	439	494	546	604	638
Food Service	298	315	331	340	364	390	422	463	505
Food Stores	75	80	83	83	88	93	95	99	103
Local Tran. & Gas	119	181	190	186	187	153	138	159	183
Arts, Ent. & Rec.	173	177	181	184	193	202	215	230	247
Retail Sales	193	198	205	204	211	218	227	241	253
Visitor Air Tran.	10	14	14	13	15	17	16	19	12
Total	1,201	1,325	1,383	1,408	1,497	1,567	1,658	1,815	1,940

Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	231	231	244	254	268	284	301	332	359
Arts, Ent. & Rec.	80	99	100	102	112	118	126	138	141
Retail**	39	40	40	40	43	46	50	51	53
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	7	6	6	5	7	8	9	15	13
Other Travel*	9	8	11	13	14	14	14	17	20
Total	366	384	401	414	443	471	500	553	585

Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	9,840	9,890	10,010	10,190	10,420	10,600	11,030	11,290	11,820
Arts, Ent. & Rec.	3,850	4,230	4,130	4,310	4,570	4,640	4,930	5,310	5,060
Retail**	1,580	1,590	1,580	1,560	1,620	1,700	1,800	1,760	1,780
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	150	120	100	100	120	150	180	220	190
Other Travel*	300	260	370	420	460	490	400	430	510
Total	15,720	16,090	16,190	16,580	17,200	17,590	18,340	19,010	19,360

Government Revenue Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	58	62	64	64	70	77	84	90	98
State Tax Receipts	57	67	69	66	67	72	76	84	91
Total	115	129	134	131	138	149	160	174	189

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

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

***STVR stands for Short Term Vacation Rental

Northern Arizona includes Apache, Coconino and Navajo counties.

West Coast Arizona Travel Impacts
2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	1,123	1,191	1,206	1,211	1,221	1,194	1,191	1,272	1,326
Other Travel*	105	144	147	148	152	93	84	110	118
Total	1,229	1,335	1,353	1,360	1,373	1,287	1,275	1,381	1,444

Visitor Spending by Type of Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	244	278	277	267	279	293	306	341	373
Private Home	232	265	265	277	272	259	256	281	286
Campground	122	133	128	122	120	117	116	119	125
Vacation Home	96	104	106	106	108	108	110	113	117
Day Travel	430	412	429	440	441	416	402	418	425
Total	1,123	1,191	1,206	1,211	1,221	1,194	1,191	1,272	1,326

Visitor Spending by Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	124	133	132	128	137	148	157	173	185
Food Service	254	266	271	279	284	292	304	330	347
Food Stores	133	126	131	135	138	135	130	133	133
Local Tran. & Gas	126	188	191	188	180	141	122	140	154
Arts, Ent. & Rec.	251	259	255	250	250	254	261	274	283
Retail Sales	224	206	214	219	218	209	203	208	209
Visitor Air Tran.	11	12	12	12	14	15	14	15	16
Total	1,123	1,191	1,206	1,211	1,221	1,194	1,191	1,272	1,326

Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	135	140	137	144	150	172	187	205	217
Arts, Ent. & Rec.	105	94	98	95	103	105	108	113	119
Retail**	53	49	49	50	52	52	52	54	56
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	1	1	0	0	0	0	1	1	1
Other Travel*	15	16	16	17	19	5	7	13	12
Total	308	300	301	306	323	334	354	385	406

Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	6,730	6,810	6,440	6,660	6,810	7,540	7,950	8,070	8,210
Arts, Ent. & Rec.	4,410	4,170	4,550	4,250	4,440	4,600	4,550	4,420	4,500
Retail**	1,900	1,740	1,700	1,700	1,720	1,690	1,680	1,650	1,660
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	20	10	10	10	10	10	20	20
Other Travel*	540	530	520	530	550	190	240	350	330
Total	13,600	13,270	13,210	13,140	13,520	14,040	14,440	14,510	14,710

Government Revenue Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	43	43	43	43	43	45	47	51	55
State Tax Receipts	54	59	60	58	56	57	57	62	65
Total	97	102	102	100	99	102	104	113	120

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

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

***STVR stands for Short Term Vacation Rental

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

North Central Arizona Travel Impacts
2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	776	850	898	920	947	975	996	1,085	1,165
Other Travel*	54	73	75	77	78	51	46	58	81
Total	831	923	973	996	1,024	1,026	1,042	1,143	1,246

Visitor Spending by Type of Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	236	261	293	312	332	365	387	449	505
Private Home	108	127	130	130	131	128	126	134	139
Campground	24	27	27	27	28	27	27	28	30
Vacation Home	37	39	39	40	41	41	42	43	45
Day Travel	371	397	408	411	415	413	413	430	447
Total	776	850	898	920	947	975	996	1,085	1,165

Visitor Spending by Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	117	126	141	153	167	192	211	245	276
Food Service	155	166	176	183	190	202	211	231	249
Food Stores	60	64	66	67	70	72	72	74	76
Local Tran. & Gas	77	117	124	122	120	97	84	96	108
Arts, Ent. & Rec.	259	263	273	277	280	289	295	311	323
Retail Sales	107	113	116	117	118	121	122	127	132
Visitor Air Tran.	1	1	2	1	1	1	1	1	1
Total	776	850	898	920	947	975	996	1,085	1,165

Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	97	100	110	120	129	146	159	174	192
Arts, Ent. & Rec.	98	87	89	89	95	98	101	108	114
Retail**	24	25	25	25	26	28	29	31	32
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	1	1	1
Other Travel*	7	6	6	7	8	3	3	6	12
Total	227	218	231	242	259	276	294	320	351

Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	4,240	4,280	4,600	4,830	5,100	5,490	5,870	6,030	6,340
Arts, Ent. & Rec.	5,090	4,630	4,590	4,510	4,830	4,840	4,870	5,110	5,100
Retail**	1,000	1,000	980	990	1,020	1,070	1,080	1,090	1,110
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*	290	230	220	220	230	120	130	170	240
Total	10,640	10,150	10,390	10,550	11,190	11,530	11,960	12,410	12,790

Government Revenue Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	31	32	34	36	38	41	44	50	56
State Tax Receipts	37	42	44	43	43	45	47	51	56
Total	69	74	78	79	81	87	91	101	112

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

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

***STVR stands for Short Term Vacation Rental

North Central Arizona includes Gila and Yavapai counties.

Phoenix & Central Arizona Travel Impacts
2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	7,990	9,130	9,290	9,582	10,140	10,639	10,954	11,580	12,637
Other Travel*	2,165	2,733	2,928	3,055	3,125	2,997	2,937	3,131	3,431
Total	10,155	11,863	12,219	12,638	13,264	13,636	13,891	14,711	16,067

Visitor Spending by Type of Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	4,006	4,575	4,695	4,872	5,212	5,613	5,842	6,219	6,896
Private Home	2,288	2,623	2,624	2,696	2,828	2,918	2,970	3,112	3,325
Campground	267	293	297	304	321	314	315	327	347
Vacation Home	320	345	357	365	378	386	397	411	430
Day Travel	1,109	1,294	1,318	1,346	1,401	1,408	1,430	1,512	1,639
Total	7,990	9,130	9,290	9,582	10,140	10,639	10,954	11,580	12,637

Visitor Spending by Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	1,375	1,522	1,568	1,642	1,794	2,025	2,115	2,265	2,519
Food Service	1,864	2,091	2,156	2,243	2,385	2,547	2,706	2,889	3,175
Food Stores	306	339	343	352	375	394	399	408	430
Local Tran. & Gas	954	1,268	1,297	1,313	1,350	1,238	1,202	1,295	1,447
Arts, Ent. & Rec.	1,111	1,192	1,205	1,229	1,280	1,332	1,387	1,443	1,545
Retail Sales	1,225	1,356	1,368	1,391	1,435	1,485	1,522	1,569	1,667
Visitor Air Tran.	1,155	1,363	1,353	1,411	1,520	1,618	1,623	1,711	1,853
Total	7,990	9,130	9,290	9,582	10,140	10,639	10,954	11,580	12,637

Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	1,212	1,289	1,328	1,396	1,473	1,572	1,648	1,778	1,924
Arts, Ent. & Rec.	526	545	587	616	670	701	738	780	856
Retail**	207	230	227	228	246	265	281	291	309
Ground Tran.	108	116	119	120	129	139	149	170	183
Visitor Air Tran.	532	612	602	602	610	684	693	764	789
Other Travel*	705	795	854	893	892	947	971	1,034	1,087
Total	3,289	3,588	3,716	3,854	4,020	4,309	4,478	4,816	5,148

Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	43,530	44,580	45,030	47,160	48,480	50,120	51,860	53,170	55,020
Arts, Ent. & Rec.	16,600	17,170	17,870	18,780	20,010	21,350	21,490	22,140	23,730
Retail**	6,460	6,760	6,670	6,830	7,190	7,620	7,940	8,010	8,130
Ground Tran.	2,840	2,920	2,970	3,040	3,160	3,320	3,600	4,030	4,130
Visitor Air Tran.	7,000	7,040	7,160	7,000	7,300	7,720	7,820	8,010	8,360
Other Travel*	12,060	12,340	13,290	13,010	14,100	15,070	15,400	15,240	15,000
Total	88,490	90,800	92,990	95,820	100,240	105,190	108,110	110,600	114,370

Government Revenue Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	447	492	495	514	536	586	613	665	800
State Tax Receipts	406	491	503	495	491	522	538	582	638
Total	854	983	998	1,010	1,026	1,108	1,151	1,247	1,438

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

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

***STVR stands for Short Term Vacation Rental

Phoenix & Central Arizona includes Maricopa and Pinal counties.

Tucson & Southern Arizona Travel Impacts
2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	2,630	2,668	2,771	2,805	2,874	2,861	2,756	2,957	3,060
Other Travel*	471	599	690	627	629	571	549	588	598
Total	3,102	3,267	3,461	3,432	3,503	3,432	3,305	3,545	3,658

Visitor Spending by Type of Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	1,023	1,093	1,118	1,131	1,169	1,227	1,197	1,292	1,360
Private Home	538	598	600	592	604	599	589	623	650
Campground	39	45	46	45	45	43	42	44	46
Vacation Home	55	58	60	60	61	61	62	63	66
Day Travel	975	874	947	976	995	931	866	935	938
Total	2,630	2,668	2,771	2,805	2,874	2,861	2,756	2,957	3,060

Visitor Spending by Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	377	388	394	398	414	443	440	473	508
Food Service	629	651	682	699	724	760	756	817	851
Food Stores	310	265	289	302	313	299	275	286	279
Local Tran. & Gas	305	394	411	408	406	358	319	352	375
Arts, Ent. & Rec.	205	210	212	211	214	220	217	227	232
Retail Sales	616	557	585	597	600	578	544	582	579
Visitor Air Tran.	188	203	198	190	202	204	205	219	236
Total	2,630	2,668	2,771	2,805	2,874	2,861	2,756	2,957	3,060

Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	373	385	411	416	444	481	491	530	536
Arts, Ent. & Rec.	93	92	93	93	104	107	107	114	127
Retail**	126	113	116	117	123	123	119	123	123
Ground Tran.	28	28	29	29	31	33	33	38	42
Visitor Air Tran.	11	10	9	8	10	11	12	12	12
Other Travel*	55	57	86	67	70	71	76	77	67
Total	685	685	744	730	781	826	838	894	907

Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	16,600	16,540	17,180	17,280	17,860	18,400	18,420	18,400	17,940
Arts, Ent. & Rec.	5,470	5,450	5,410	5,450	5,820	5,900	6,060	6,150	6,620
Retail**	4,550	4,000	4,000	4,020	4,120	4,050	3,870	3,840	3,740
Ground Tran.	730	710	740	740	750	800	800	900	950
Visitor Air Tran.	220	200	180	130	170	170	180	160	170
Other Travel*	1,650	1,510	2,210	1,920	1,850	1,830	1,980	1,950	1,670
Total	29,210	28,400	29,710	29,540	30,580	31,140	31,310	31,400	31,080

Government Revenue Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	96	97	99	99	100	106	105	97	101
State Tax Receipts	130	143	149	143	140	144	141	154	160
Total	226	240	249	241	240	249	246	250	262

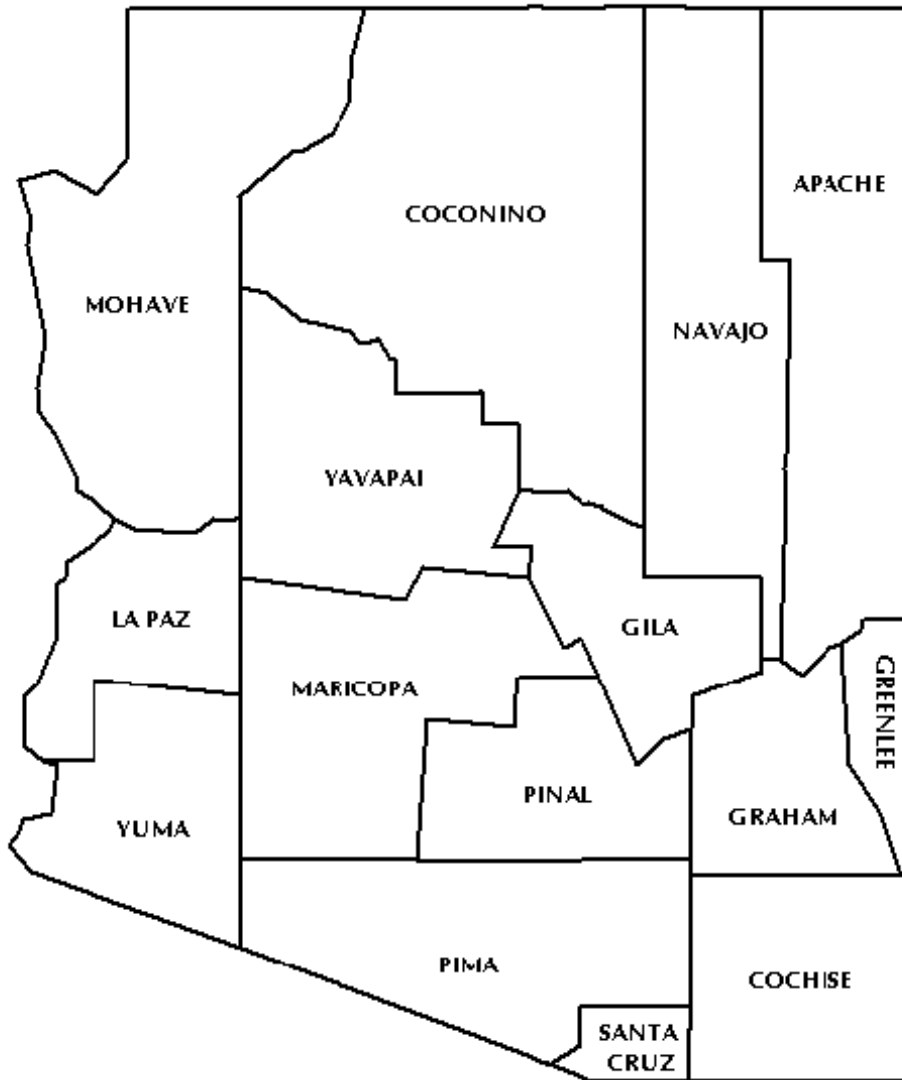
*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

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

***STVR stands for Short Term Vacation Rental

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

IV. COUNTY TRAVEL IMPACTS
2009-2018p



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.

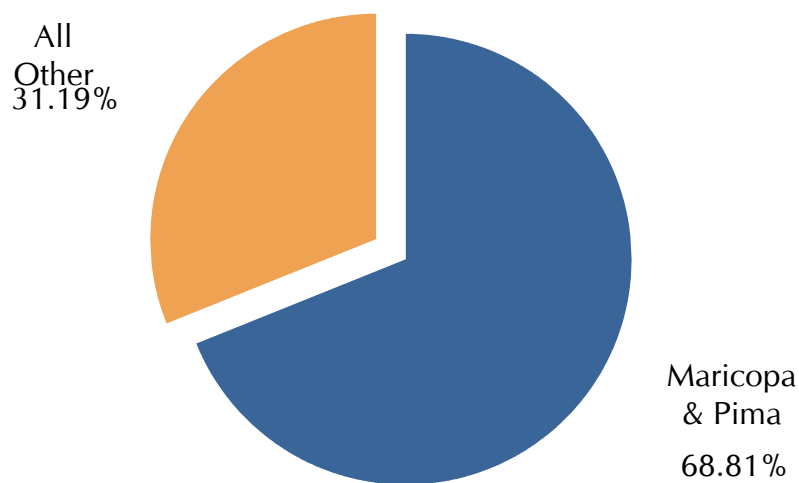
Urban areas, such as Maricopa County, tend to have highly developed travel industry infrastructure consisting of large inventories of amusement and recreation opportunities, commercial accommodations, and well-developed transportation links. Hotel/motel guests are important to these areas and, hence, 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, 2018p

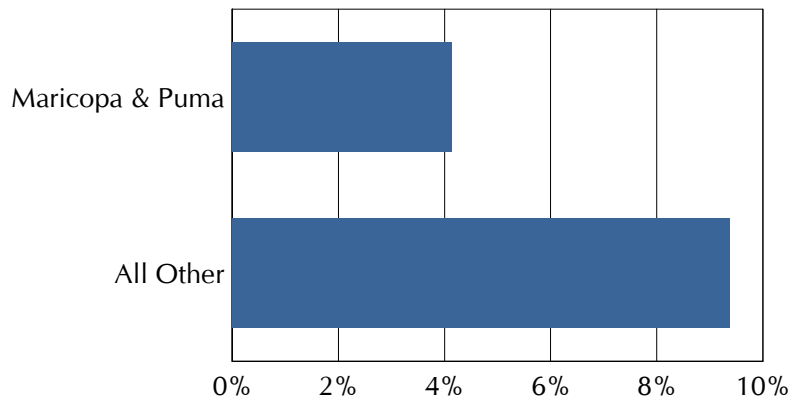
Percent of State Direct Travel



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, 2018p



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, 2018p

	Employment			Earnings (\$Millions)		
	Total	Travel	Percent Travel	Total	Travel	Percent Travel
Apache	28,420	1,590	5.6%	\$1,159	\$38	3.3%
Cochise	51,690	3,420	6.6%	\$2,895	\$84	2.9%
Coconino	87,350	13,640	15.6%	\$4,313	\$434	10.1%
Gila	21,270	2,880	13.5%	\$945	\$82	8.7%
Graham	12,690	910	7.2%	\$622	\$14	2.3%
Greenlee	5,660	110	1.9%	\$465	\$2	0.5%
La Paz	8,270	1,410	17.1%	\$385	\$41	10.6%
Maricopa	2,685,720	107,660	4.0%	\$157,304	\$4,961	3.2%
Mohave	72,000	7,090	9.8%	\$3,026	\$196	6.5%
Navajo	39,730	4,130	10.4%	\$1,618	\$113	7.0%
Pima	520,970	24,670	4.7%	\$27,352	\$752	2.8%
Pinal	98,370	6,710	6.8%	\$4,547	\$187	4.1%
Santa Cruz	20,680	1,980	9.6%	\$1,224	\$54	4.4%
Yavapai	103,220	9,910	9.6%	\$4,203	\$269	6.4%
Yuma	90,190	6,210	6.9%	\$5,324	\$169	3.2%

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.

2018p Arizona County Travel Impacts

Related Travel-Generated Impacts

	Travel Spending		Earnings (\$Million)	Employment (jobs)	Taxes		
	Total (\$Million)	Visitor (\$Million)			Local (\$Million)	State (\$Million)	Total (\$Million)
Apache	119	105	38	1,590	4.0	5.9	9.9
Cochise	331	305	84	3,420	14.0	15.0	28.9
Coconino	1,569	1,513	434	13,640	79.1	67.9	147.0
Gila	297	286	82	2,880	9.9	13.7	23.6
Graham	64	56	14	910	2.7	3.0	5.7
Greenlee	14	12	2	110	0.2	0.7	0.9
La Paz	164	160	41	1,410	6.2	7.2	13.5
Maricopa	15,316	11,971	4,961	107,660	773.0	602.3	1,375.3
Mohave	630	569	196	7,090	25.2	29.4	54.6
Navajo	343	322	113	4,130	14.8	16.7	31.5
Pima	3,021	2,467	752	24,670	76.6	132.2	208.8
Pinal	752	666	187	6,710	27.2	35.3	62.5
Santa Cruz	228	220	54	1,980	7.8	9.5	17.3
Yavapai	949	879	269	9,910	46.4	41.9	88.3
Yuma	651	598	169	6,210	23.4	28.9	52.2
Arizona	24,446	20,128	7,397	192,320	1,111	1,010	2,120

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, 2009-2018p
(\$Millions)

	2009	2011	2012	2013	2014	2015	2016	2017	2018	Annual Percent Chg.	
										17-18p	09-18p
Apache	31	31	32	29	31	33	36	37	38	3.2%	2.3%
Cochise	82	78	77	77	79	81	79	82	84	2.7%	0.4%
Coconino	265	276	284	299	323	343	365	409	434	6.0%	5.6%
Gila	64	55	58	61	65	69	73	78	82	5.2%	2.8%
Graham	10	12	13	14	15	12	12	13	14	7.2%	3.6%
Greenlee	2	2	2	3	3	3	2	2	2	-1.7%	2.1%
La Paz	29	31	31	33	33	34	34	36	41	13.7%	3.8%
Maricopa	3,168	3,460	3,582	3,723	3,884	4,162	4,310	4,635	4,961	7.0%	5.1%
Mohave	134	125	124	134	145	151	165	185	196	5.8%	4.3%
Navajo	69	77	85	86	89	94	98	106	113	6.6%	5.6%
Pima	538	549	605	587	631	674	693	743	752	1.3%	3.8%
Pinal	121	128	134	131	137	147	168	181	187	3.5%	5.0%
Santa Cruz	54	44	47	49	53	57	53	54	54	0.6%	0.1%
Yavapai	163	164	173	181	194	207	221	242	269	11.1%	5.7%
Yuma	145	144	146	139	145	150	155	165	169	2.9%	1.7%

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

Arizona County Travel-Generated Employment, 2009-2018p

	2009	2011	2012	2013	2014	2015	2016	2017	2018	Annual Percent Chg.	
										17-18p	09-18p
Apache	1,640	1,640	1,590	1,480	1,540	1,610	1,700	1,600	1,590	-0.6%	-0.4%
Cochise	4,150	3,910	3,750	3,710	3,750	3,760	3,580	3,430	3,420	-0.3%	-2.1%
Coconino	10,870	10,950	10,960	11,420	11,890	12,030	12,640	13,340	13,640	2.2%	2.6%
Gila	2,950	2,670	2,660	2,640	2,690	2,740	2,920	2,900	2,880	-0.8%	-0.3%
Graham	890	900	950	1,050	1,050	840	810	880	910	3.3%	0.3%
Greenlee	120	130	140	150	160	140	110	110	110	-3.7%	-1.5%
La Paz	1,230	1,320	1,310	1,380	1,380	1,330	1,350	1,300	1,410	8.1%	1.5%
Maricopa	83,550	85,430	87,480	90,160	94,530	99,180	101,270	103,800	107,660	3.7%	2.9%
Mohave	6,240	5,780	5,560	5,750	6,100	6,450	6,710	6,960	7,090	2.0%	1.4%
Navajo	3,210	3,510	3,650	3,690	3,760	3,940	4,000	4,070	4,130	1.6%	2.9%
Pima	21,830	21,630	22,950	22,600	23,440	24,050	24,700	24,970	24,670	-1.2%	1.4%
Pinal	4,940	5,360	5,500	5,660	5,710	6,010	6,840	6,810	6,710	-1.5%	3.5%
Santa Cruz	2,220	1,840	1,920	2,020	2,180	2,360	2,110	2,010	1,980	-1.7%	-1.3%
Yavapai	7,690	7,470	7,730	7,910	8,500	8,790	9,040	9,510	9,910	4.2%	2.9%
Yuma	6,130	6,170	6,340	6,010	6,050	6,260	6,370	6,250	6,210	-0.6%	0.2%

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

Arizona County Direct Travel Spending, 2009-2018p
(\$Millions)

	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Apache											
Total Spending	118	127	129	117	119	115	116	118	119	0.7%	0.1%
Visitor Spending	107	110	111	100	103	102	105	106	105	-0.5%	-0.2%
Non-transportation	93	90	91	81	84	88	92	92	90	-1.7%	-0.4%
Transportation	13	20	20	19	19	15	13	14	15	7.4%	1.1%
Cochise											
Total Spending	353	362	350	343	338	325	307	327	331	1.0%	-0.7%
Visitor Spending	331	329	317	311	307	302	287	304	305	0.2%	-0.9%
Non-transportation	293	276	264	260	258	264	255	268	266	-0.8%	-1.1%
Transportation	38	54	53	51	48	39	32	36	39	8.0%	0.3%
Coconino											
Total Spending	881	996	1,050	1,088	1,172	1,236	1,311	1,450	1,569	8.2%	6.6%
Visitor Spending	848	952	994	1,027	1,111	1,182	1,264	1,397	1,513	8.3%	6.6%
Non-transportation	759	818	853	888	967	1,059	1,152	1,265	1,369	8.2%	6.8%
Transportation	89	134	141	139	144	123	113	132	144	9.0%	5.5%
Gila											
Total Spending	245	266	279	282	278	278	279	294	297	0.8%	2.1%
Visitor Spending	237	253	266	269	266	268	270	285	286	0.4%	2.1%
Non-transportation	213	217	228	232	230	240	246	257	256	-0.3%	2.1%
Transportation	24	36	38	37	35	28	25	27	30	7.6%	2.2%
Graham											
Total Spending	43	58	62	73	76	57	55	63	64	1.5%	4.3%
Visitor Spending	37	49	53	64	67	50	49	56	56	0.3%	4.6%
Non-transportation	32	40	43	53	56	43	43	49	48	-0.8%	4.9%
Transportation	6	10	10	11	11	7	6	7	8	7.2%	3.3%
Greenlee											
Total Spending	9	12	13	15	16	12	12	13	14	1.2%	4.6%
Visitor Spending	8	10	11	13	14	11	11	12	12	-0.2%	4.8%
Non-transportation	6	8	9	11	11	9	9	10	10	-1.2%	5.0%
Transportation	1	2	2	2	2	2	1	2	2	6.2%	3.9%

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

Arizona County Direct Travel Spending, 2009-2018p
(\$Millions)

La Paz	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	130	139	142	144	141	140	139	146	164	12.3%	2.6%
Visitor Spending	127	135	138	139	136	136	136	142	160	12.3%	2.6%
Non-transportation	113	113	116	118	116	120	122	127	141	11.8%	2.6%
Transportation	14	21	22	22	20	16	14	16	18	16.1%	2.6%
Maricopa	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	9,656	11,232	11,594	12,017	12,620	12,995	13,255	14,020	15,316	9.2%	5.3%
Visitor Spending	7,545	8,586	8,756	9,051	9,585	10,071	10,383	10,963	11,971	9.2%	5.3%
Non-transportation	5,492	6,048	6,198	6,416	6,804	7,288	7,621	8,029	8,753	9.0%	5.3%
Transportation	2,053	2,538	2,557	2,635	2,781	2,783	2,762	2,934	3,217	9.7%	5.1%
Mohave	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	486	545	554	580	581	524	529	600	630	5.0%	2.9%
Visitor Spending	427	467	474	497	494	484	490	541	569	5.2%	3.2%
Non-transportation	368	380	384	405	408	416	431	472	493	4.4%	3.3%
Transportation	59	87	90	92	87	68	59	69	76	10.1%	2.9%
Navajo	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	263	289	304	306	307	302	305	331	343	3.7%	3.0%
Visitor Spending	246	264	278	281	283	283	289	312	322	3.2%	3.0%
Non-transportation	219	223	236	239	243	250	260	280	286	2.4%	3.0%
Transportation	27	41	43	42	40	32	28	32	35	10.4%	3.0%
Pima	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	2,401	2,595	2,764	2,713	2,784	2,772	2,697	2,902	3,021	4.1%	2.6%
Visitor Spending	1,967	2,051	2,129	2,140	2,208	2,240	2,183	2,353	2,467	4.8%	2.5%
Non-transportation	1,536	1,542	1,611	1,631	1,686	1,745	1,713	1,843	1,921	4.2%	2.5%
Transportation	431	509	519	508	522	495	469	510	546	6.9%	2.6%
Pinal	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Total Spending	499	631	625	621	644	640	636	692	752	8.7%	4.7%
Visitor Spending	445	544	535	532	555	568	572	617	666	7.9%	4.6%
Non-transportation	389	452	442	442	465	495	508	545	584	7.1%	4.6%
Transportation	56	92	92	89	89	73	63	73	82	13.6%	4.4%

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

Arizona County Direct Travel Spending, 2009-2018p
(\$Millions)

	2009	2011	2012	2013	2014	2015	2016	2017	2018	17-18p	09-18p
Santa Cruz											
Total Spending	295	239	271	288	289	266	234	239	228	-4.5%	-2.8%
Visitor Spending	287	228	260	278	278	257	227	231	220	-5.0%	-2.9%
Non-transportation	270	206	235	252	254	239	212	215	202	-5.9%	-3.1%
Transportation	18	22	25	25	24	19	14	16	17	6.3%	-0.3%
Yavapai											
Total Spending	586	657	695	715	746	748	763	849	949	11.9%	5.5%
Visitor Spending	540	597	632	651	681	707	725	800	879	9.9%	5.6%
Non-transportation	486	515	544	565	596	637	665	730	800	9.5%	5.7%
Transportation	54	82	87	86	85	69	60	70	79	13.9%	4.5%
Yuma											
Total Spending	612	650	657	635	651	623	606	636	651	2.3%	0.7%
Visitor Spending	569	589	594	575	590	575	564	588	598	1.6%	0.6%
Non-transportation	505	498	503	488	504	502	501	518	522	0.7%	0.4%
Transportation	64	92	91	87	87	73	64	70	76	8.1%	2.0%
Arizona											
Total Spending	16,577	18,798	19,489	19,936	20,762	21,034	21,245	22,679	24,446	7.8%	4.4%
Visitor Spending	13,721	15,165	15,548	15,927	16,678	17,235	17,555	18,708	20,128	7.6%	4.3%
Non-transportation	10,774	11,425	11,757	12,081	12,683	13,394	13,831	14,701	15,744	7.1%	4.3%
Transportation	2,947	3,740	3,791	3,845	3,995	3,841	3,724	4,007	4,384	9.4%	4.5%

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

APACHE COUNTY Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	106.8	109.9	111.5	100.0	102.9	102.2	105.3	105.5	105.0
Other Travel*	10.9	16.6	17.2	16.5	16.1	12.8	11.2	12.3	13.7
Total	117.7	126.5	128.6	116.5	119.1	114.9	116.5	117.9	118.7
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	51.9	46.8	46.8	37.1	38.5	40.3	43.1	43.2	41.1
Private Home	32.1	38.1	39.0	37.7	39.1	37.1	37.1	37.1	38.0
Campground	6.6	7.5	7.7	7.5	7.4	7.1	6.9	7.2	7.5
Vacation Home	11.8	12.7	13.0	12.9	13.1	13.0	13.4	13.3	13.6
Day Travel	4.4	4.9	5.0	4.7	4.8	4.7	4.7	4.8	4.8
Total	106.8	109.9	111.5	100.0	102.9	102.2	105.3	105.5	105.0
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	23.4	21.1	21.0	17.3	17.9	19.1	20.7	20.6	19.7
Food Service	28.6	28.7	29.4	27.4	28.8	29.9	31.9	32.2	32.5
Food Stores	9.3	9.8	10.0	9.6	10.1	10.2	10.4	10.1	10.0
Local Tran. & Gas	13.4	19.8	20.4	18.7	18.5	14.7	12.9	13.8	14.8
Arts, Ent. & Rec.	8.5	8.2	8.3	7.6	7.8	8.0	8.3	8.2	8.1
Retail Sales	23.7	22.4	22.4	19.4	19.9	20.3	21.0	20.6	19.8
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	106.8	109.9	111.5	100.0	102.9	102.2	105.3	105.5	105.0
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	21.4	22.1	23.0	20.8	21.8	23.5	26.0	26.8	27.6
Arts, Ent. & Rec.	4.1	3.7	3.7	3.4	4.0	4.1	4.3	4.4	4.4
Retail**	4.9	4.7	4.6	4.1	4.4	4.7	5.0	5.1	5.3
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*	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6
Total	30.9	31.0	31.9	28.9	30.8	32.9	35.9	36.8	38.0
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	1,110	1,140	1,110	1,050	1,090	1,150	1,240	1,170	1,160
Arts, Ent. & Rec.	290	260	240	210	220	210	200	180	180
Retail**	220	210	200	200	210	220	230	210	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*	30	20	20	30	30	30	30	30	30
Total	1,640	1,640	1,590	1,480	1,540	1,610	1,700	1,600	1,590
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	3.9	3.8	3.8	3.2	3.3	3.5	3.8	3.9	4.0
State Tax Receipts	5.7	6.1	6.2	5.3	5.4	5.5	5.8	5.8	5.9
Total	9.6	10.0	10.0	8.5	8.6	9.0	9.5	9.7	9.9

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.

COCHISE COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	330.6	329.1	316.6	310.8	306.7	302.4	287.0	304.2	304.9
Other Travel*	22.7	32.9	33.2	32.2	31.3	22.8	19.8	23.0	25.6
Total	353.3	362.0	349.8	343.0	338.0	325.3	306.7	327.2	330.5
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	129.2	131.7	111.8	102.4	98.5	106.2	104.5	113.9	113.4
Private Home	58.6	69.3	68.8	68.4	67.4	66.1	62.5	65.2	67.5
Campground	8.8	10.0	10.2	10.0	9.9	9.4	9.2	9.6	10.0
Vacation Home	6.4	6.9	7.0	6.9	6.9	6.9	6.9	6.9	7.2
Day Travel	127.6	111.1	118.8	123.0	124.0	113.9	103.9	108.6	106.9
Total	330.6	329.1	316.6	310.8	306.7	302.4	287.0	304.2	304.9
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	47.2	47.2	40.2	35.2	35.5	38.4	38.8	43.5	42.9
Food Service	85.3	83.5	80.9	81.4	81.2	85.1	84.3	89.4	91.0
Food Stores	64.5	52.8	57.3	59.9	61.7	57.9	52.6	53.8	51.8
Local Tran. & Gas	37.6	53.6	53.0	51.2	48.4	38.7	32.0	35.8	38.6
Arts, Ent. & Rec.	21.7	21.8	20.1	19.6	19.0	20.0	19.7	20.3	20.4
Retail Sales	74.4	70.3	65.1	63.5	61.1	62.3	59.5	61.4	60.2
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	330.6	329.1	316.6	310.8	306.7	302.4	287.0	304.2	304.9
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	48.9	49.2	48.5	48.8	50.2	51.1	49.7	51.9	53.3
Arts, Ent. & Rec.	11.1	9.8	9.8	10.0	10.4	11.0	11.0	11.6	12.3
Retail**	19.7	17.5	16.8	16.6	17.0	17.4	16.8	17.2	17.2
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	2.0	1.7	1.7	1.8	1.9	1.1	1.2	1.6	1.6
Total	81.8	78.2	76.8	77.3	79.5	80.5	78.6	82.2	84.4
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	2,510	2,440	2,380	2,340	2,360	2,370	2,210	2,110	2,120
Arts, Ent. & Rec.	760	700	650	650	680	690	700	670	670
Retail**	800	700	660	650	650	650	630	600	580
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*	90	70	60	70	70	50	50	50	50
Total	4,150	3,910	3,750	3,710	3,750	3,760	3,580	3,430	3,420
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	14.5	14.2	13.1	12.2	12.0	12.6	12.4	13.3	14.0
State Tax Receipts	15.6	16.7	16.0	15.0	14.1	14.5	14.0	14.8	15.0
Total	30.1	30.9	29.1	27.2	26.2	27.1	26.4	28.1	28.9

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.

COCONINO COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	847.9	951.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4	1,513.0
Other Travel*	32.6	44.0	56.7	60.6	60.5	54.5	46.7	52.4	56.0
Total	880.5	995.7	1,050.2	1,088.1	1,171.6	1,236.2	1,311.2	1,449.8	1,569.0
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	562.8	633.4	664.9	695.2	764.3	832.3	906.3	1,013.2	1,105.3
Private Home	52.4	62.2	63.2	63.3	65.9	64.8	64.1	67.8	66.4
Campground	22.6	25.2	26.4	25.9	25.5	24.3	23.7	24.7	25.9
Vacation Home	31.0	32.8	33.9	34.2	35.0	35.3	36.0	36.6	37.8
Day Travel	179.2	198.1	205.2	208.9	220.3	225.1	234.3	255.2	277.6
Total	847.9	951.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4	1,513.0
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	258.3	289.0	304.5	323.9	363.9	415.8	462.2	513.3	548.8
Food Service	205.2	219.8	230.7	240.5	260.6	282.2	307.9	342.2	379.7
Food Stores	47.0	50.4	52.1	53.3	57.2	60.6	62.6	66.2	70.4
Local Tran. & Gas	78.8	120.3	126.8	126.0	128.2	105.7	97.0	113.6	132.4
Arts, Ent. & Rec.	135.1	138.9	142.9	145.8	154.6	163.3	174.4	188.9	204.4
Retail Sales	113.2	119.5	122.8	124.9	131.1	137.3	144.3	154.5	165.5
Visitor Air Tran.	10.3	13.7	13.7	13.2	15.5	16.8	16.0	18.6	11.8
Total	847.9	951.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4	1,513.0
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	163.1	161.3	169.3	179.4	192.1	202.2	213.6	238.0	261.2
Arts, Ent. & Rec.	63.4	77.1	74.4	76.8	85.2	90.5	97.6	107.8	106.5
Retail**	23.7	24.9	25.0	25.1	27.5	30.0	32.5	33.5	35.2
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	7.1	6.4	5.5	5.4	6.5	7.9	9.4	14.8	13.0
Other Travel*	8.0	6.5	10.2	11.9	12.2	12.8	12.2	15.2	18.0
Total	265.3	276.2	284.3	298.7	323.5	343.3	365.4	409.4	433.9
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	6,570	6,500	6,600	6,820	6,990	7,020	7,330	7,630	8,140
Arts, Ent. & Rec.	2,990	3,160	3,000	3,200	3,410	3,390	3,690	4,040	3,740
Retail**	940	970	950	950	990	1,050	1,110	1,100	1,140
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	150	120	100	100	120	150	180	220	190
Other Travel*	230	200	310	350	390	420	320	360	430
Total	10,870	10,950	10,960	11,420	11,890	12,030	12,640	13,340	13,640
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	43.9	47.7	48.9	50.4	55.8	61.9	67.3	72.3	79.1
State Tax Receipts	39.2	46.6	48.4	46.7	48.2	52.1	55.8	62.4	67.9
Total	83.1	94.2	97.2	97.1	104.1	114.0	123.1	134.6	147.0

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.

GILA COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	236.8	253.3	266.2	269.0	265.9	268.3	270.3	284.8	286.0
Other Travel*	8.5	12.3	12.5	12.6	12.4	9.5	8.3	9.5	10.5
Total	245.3	265.6	278.7	281.6	278.3	277.8	278.6	294.3	296.5
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	38.2	39.6	47.4	50.6	48.9	53.5	56.4	64.8	62.9
Private Home	35.7	41.4	42.6	42.3	41.3	40.9	40.2	42.1	42.2
Campground	11.7	13.4	13.7	13.4	13.2	12.6	12.3	12.8	13.4
Vacation Home	13.2	13.8	14.0	14.1	14.3	14.3	14.5	14.7	15.1
Day Travel	138.0	145.1	148.4	148.6	148.2	147.0	146.9	150.4	152.3
Total	236.8	253.3	266.2	269.0	265.9	268.3	270.3	284.8	286.0
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	16.3	16.5	18.7	19.6	20.0	22.4	23.9	27.1	26.6
Food Service	43.9	46.0	48.8	50.2	50.3	53.2	55.4	58.9	59.7
Food Stores	20.0	21.1	21.6	21.8	22.1	22.8	22.6	22.8	22.7
Local Tran. & Gas	24.2	36.2	38.2	37.3	35.5	28.5	24.6	27.4	29.5
Arts, Ent. & Rec.	100.0	100.3	104.6	105.8	104.4	107.3	109.6	113.8	113.2
Retail Sales	32.3	33.3	34.2	34.3	33.6	34.1	34.2	34.8	34.4
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	236.8	253.3	266.2	269.0	265.9	268.3	270.3	284.8	286.0
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	22.9	22.3	24.7	26.9	28.5	30.9	34.1	37.1	41.3
Arts, Ent. & Rec.	32.2	23.8	24.6	25.6	28.0	28.8	29.5	30.9	30.6
Retail**	7.9	8.1	8.1	8.0	8.2	8.7	9.0	9.3	9.4
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*	0.5	0.4	0.4	0.5	0.5	0.4	0.5	0.5	0.5
Total	63.6	54.6	57.7	61.1	65.3	68.8	73.1	77.8	81.9
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	1,130	1,110	1,170	1,240	1,300	1,380	1,500	1,510	1,590
Arts, Ent. & Rec.	1,450	1,220	1,150	1,050	1,030	1,000	1,040	1,020	930
Retail**	340	330	320	330	330	340	350	340	330
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	2,950	2,670	2,660	2,640	2,690	2,740	2,920	2,900	2,880
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	7.6	7.3	7.6	7.6	7.7	8.2	8.6	9.5	9.9
State Tax Receipts	11.2	11.8	12.4	12.1	11.8	12.3	12.5	13.4	13.7
Total	18.8	19.1	20.0	19.8	19.5	20.5	21.1	22.8	23.6

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.

GRAHAM COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	37.4	49.4	53.4	63.7	67.1	50.1	49.2	56.1	56.2
Other Travel*	6.0	8.9	9.0	9.0	9.0	6.8	5.8	6.7	7.5
Total	43.5	58.2	62.5	72.7	76.1	56.9	55.0	62.8	63.7
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	14.0	21.2	25.1	34.7	37.5	23.7	23.0	28.2	27.8
Private Home	16.9	20.3	20.3	20.5	20.9	18.8	18.6	19.8	20.2
Campground	1.6	1.9	1.9	1.9	1.8	1.8	1.7	1.8	1.9
Vacation Home	0.6	0.6	0.6	0.6	0.7	0.6	0.6	0.7	0.7
Day Travel	4.4	5.4	5.6	6.0	6.3	5.2	5.2	5.7	5.7
Total	37.4	49.4	53.4	63.7	67.1	50.1	49.2	56.1	56.2
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	5.3	7.4	9.0	13.2	13.7	8.4	8.3	10.5	10.3
Food Service	11.2	13.7	14.6	16.9	18.2	15.2	15.6	17.5	17.7
Food Stores	4.0	4.6	4.7	5.0	5.3	4.8	4.8	5.0	4.9
Local Tran. & Gas	5.9	9.7	10.2	10.8	10.8	7.3	6.3	7.4	7.9
Arts, Ent. & Rec.	3.1	3.6	3.7	4.2	4.5	3.7	3.7	4.0	4.0
Retail Sales	7.9	10.3	11.2	13.6	14.6	10.7	10.5	11.8	11.5
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	37.4	49.4	53.4	63.7	67.1	50.1	49.2	56.1	56.2
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	6.1	6.8	7.6	8.8	9.0	7.3	7.3	7.8	8.7
Arts, Ent. & Rec.	1.9	2.2	2.3	2.4	2.6	2.1	2.1	2.4	2.4
Retail**	1.8	2.2	2.2	2.5	2.8	2.3	2.3	2.5	2.5
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*	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.4	0.4
Total	10.2	11.6	12.5	14.1	14.9	12.1	12.1	13.1	14.0
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	430	430	470	550	540	420	410	400	440
Arts, Ent. & Rec.	360	370	380	390	400	320	300	370	370
Retail**	70	90	90	100	100	90	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*	20	20	20	20	20	10	10	20	20
Total	890	900	950	1,050	1,050	840	810	880	910
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	1.6	2.0	2.3	2.9	3.1	2.2	2.2	2.6	2.7
State Tax Receipts	2.2	2.8	3.0	3.3	3.3	2.7	2.7	2.9	3.0
Total	3.8	4.9	5.3	6.2	6.4	4.9	4.9	5.6	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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	7.7	10.2	11.0	12.8	13.7	10.7	10.6	11.8	11.8
Other Travel*	1.3	2.0	2.1	2.0	2.1	1.7	1.5	1.6	1.8
Total	9.1	12.2	13.1	14.9	15.8	12.4	12.1	13.4	13.6
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	2.5	3.9	4.5	6.2	6.7	4.3	4.1	5.0	5.0
Private Home	3.9	4.7	4.8	4.9	5.1	4.8	4.8	5.0	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	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	1.0	1.2	1.2	1.3	1.4	1.2	1.2	1.3	1.3
Total	7.7	10.2	11.0	12.8	13.7	10.7	10.6	11.8	11.8
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	0.9	1.3	1.6	2.3	2.3	1.5	1.4	1.8	1.8
Food Service	2.4	2.9	3.1	3.6	3.9	3.4	3.5	3.9	3.9
Food Stores	0.9	1.0	1.0	1.1	1.2	1.1	1.1	1.2	1.1
Local Tran. & Gas	1.3	2.1	2.2	2.3	2.4	1.7	1.5	1.7	1.8
Arts, Ent. & Rec.	0.7	0.8	0.8	0.9	1.0	0.8	0.8	0.9	0.9
Retail Sales	1.6	2.1	2.3	2.7	2.9	2.2	2.2	2.4	2.3
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	7.7	10.2	11.0	12.8	13.7	10.7	10.6	11.8	11.8
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	1.2	1.4	1.5	1.9	2.0	1.6	1.1	1.3	1.2
Arts, Ent. & Rec.	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Retail**	0.4	0.5	0.5	0.6	0.7	0.6	0.6	0.6	0.6
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*	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total	1.9	2.3	2.5	3.0	3.1	2.6	2.1	2.4	2.3
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	90	90	100	110	110	100	60	70	70
Arts, Ent. & Rec.	10	10	10	10	20	10	10	20	20
Retail**	20	20	20	20	30	20	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	10	10	10	10	10
Total	120	130	140	150	160	140	110	110	110
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	0.2	0.2	0.2	0.3	0.3	0.2	0.2	0.2	0.2
State Tax Receipts	0.5	0.6	0.7	0.7	0.7	0.6	0.6	0.7	0.7
Total	0.7	0.8	0.9	1.0	1.0	0.9	0.8	0.9	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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	127.2	134.6	137.6	139.2	136.0	136.0	136.3	142.2	159.6
Other Travel*	3.1	4.7	4.8	4.7	4.6	3.6	3.1	3.5	4.0
Total	130.3	139.3	142.4	143.9	140.6	139.6	139.4	145.7	163.7
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	8.1	6.9	8.3	10.2	8.8	10.3	11.0	12.9	23.8
Private Home	14.4	16.5	16.4	16.4	15.6	15.6	15.3	16.2	17.2
Campground	29.6	31.9	32.5	31.9	31.4	30.6	30.4	31.3	32.5
Vacation Home	16.1	16.9	17.1	17.3	17.5	17.3	17.6	18.1	18.9
Day Travel	59.1	62.4	63.3	63.5	62.8	62.1	62.0	63.7	67.3
Total	127.2	134.6	137.6	139.2	136.0	136.0	136.3	142.2	159.6
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	9.8	9.6	10.1	10.8	10.6	11.4	11.9	12.7	16.7
Food Service	23.9	24.5	25.3	26.2	25.9	27.4	28.5	30.2	34.5
Food Stores	12.5	13.0	13.2	13.3	13.4	13.8	13.7	13.8	14.5
Local Tran. & Gas	14.4	21.3	22.0	21.5	20.2	16.2	14.0	15.6	18.1
Arts, Ent. & Rec.	48.4	47.7	48.4	48.8	47.8	48.8	49.8	51.1	55.8
Retail Sales	18.1	18.4	18.5	18.6	18.1	18.4	18.4	18.7	20.1
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	127.2	134.6	137.6	139.2	136.0	136.0	136.3	142.2	159.6
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	10.3	12.5	12.5	13.4	13.3	13.6	13.3	14.2	17.0
Arts, Ent. & Rec.	14.3	14.2	14.4	14.8	15.1	15.5	15.9	16.5	18.2
Retail**	4.4	4.4	4.3	4.3	4.4	4.6	4.8	4.9	5.4
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*	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Total	29.1	31.3	31.3	32.6	32.9	33.9	34.1	35.8	40.8
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	550	650	650	700	690	670	670	650	730
Arts, Ent. & Rec.	480	470	480	500	510	480	490	470	490
Retail**	190	190	180	180	170	180	190	180	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	1,320	1,310	1,380	1,380	1,330	1,350	1,300	1,410
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	4.2	4.3	4.4	4.3	4.2	4.4	4.5	5.3	6.2
State Tax Receipts	5.7	6.2	6.3	6.2	5.9	6.1	6.1	6.4	7.2
Total	9.9	10.6	10.7	10.6	10.1	10.5	10.6	11.6	13.5

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.

MARICOPA COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	7,545	8,586	8,756	9,051	9,585	10,071	10,383	10,963	11,971
Other Travel*	2,111	2,645	2,838	2,966	3,035	2,925	2,873	3,057	3,345
Total	9,656	11,232	11,594	12,017	12,620	12,995	13,255	14,020	15,316
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	3,975	4,535	4,657	4,839	5,178	5,575	5,803	6,170	6,835
Private Home	2,085	2,370	2,381	2,451	2,568	2,648	2,699	2,821	3,015
Campground	223	243	245	253	271	267	269	279	296
Vacation Home	252	268	278	284	294	299	308	317	331
Day Travel	1,009	1,170	1,195	1,223	1,273	1,281	1,304	1,376	1,494
Total	7,545	8,586	8,756	9,051	9,585	10,071	10,383	10,963	11,971
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	1,337	1,479	1,526	1,600	1,751	1,979	2,066	2,211	2,459
Food Service	1,717	1,917	1,984	2,070	2,200	2,348	2,499	2,663	2,930
Food Stores	263	289	294	303	323	339	344	351	370
Local Tran. & Gas	898	1,175	1,204	1,224	1,261	1,165	1,139	1,222	1,364
Arts, Ent. & Rec.	1,044	1,116	1,132	1,156	1,203	1,252	1,305	1,356	1,453
Retail Sales	1,131	1,246	1,262	1,286	1,327	1,371	1,407	1,449	1,541
Visitor Air Tran.	1,155	1,363	1,353	1,411	1,520	1,618	1,623	1,711	1,853
Total	7,545	8,586	8,756	9,051	9,585	10,071	10,383	10,963	11,971
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	1,147	1,214	1,248	1,319	1,395	1,487	1,544	1,663	1,806
Arts, Ent. & Rec.	491	517	556	585	637	666	701	743	818
Retail**	188	208	206	207	224	241	256	265	282
Ground Tran.	108	116	119	120	129	139	149	170	183
Visitor Air Tran.	532	612	602	602	610	684	693	764	789
Other Travel*	702	792	851	890	889	944	968	1,031	1,083
Total	3,168	3,460	3,582	3,723	3,884	4,162	4,310	4,635	4,961
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	40,620	41,370	41,710	43,650	45,010	46,470	47,530	48,800	50,750
Arts, Ent. & Rec.	15,440	15,960	16,560	17,510	18,710	20,000	20,020	20,750	22,330
Retail**	5,730	5,940	5,910	6,070	6,390	6,750	7,050	7,120	7,240
Ground Tran.	2,840	2,920	2,970	3,040	3,160	3,320	3,600	4,030	4,130
Visitor Air Tran.	7,000	7,040	7,160	7,000	7,300	7,720	7,820	8,010	8,360
Other Travel*	11,930	12,210	13,170	12,890	13,960	14,930	15,250	15,090	14,860
Total	83,550	85,430	87,480	90,160	94,530	99,180	101,270	103,800	107,660
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	430	472	476	495	516	565	590	640	773
State Tax Receipts	382	461	473	467	463	492	507	549	602
Total	812	933	949	962	979	1,057	1,098	1,189	1,375

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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	427.4	466.8	473.6	497.1	494.5	483.6	490.3	541.2	569.1
Other Travel*	58.7	78.3	80.4	83.3	86.3	40.7	38.9	58.3	60.4
Total	486.0	545.1	554.0	580.4	580.8	524.3	529.2	599.5	629.5
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	107.0	119.5	120.0	124.7	132.6	137.2	144.9	162.7	182.8
Private Home	143.9	157.5	160.8	173.5	165.5	155.2	153.8	173.2	174.2
Campground	19.4	22.1	22.6	22.2	21.8	20.8	20.4	21.2	22.2
Vacation Home	37.0	39.5	40.4	40.6	41.3	41.5	42.0	43.1	44.4
Day Travel	120.1	128.2	129.8	136.1	133.2	128.9	129.3	141.2	145.6
Total	427.4	466.8	473.6	497.1	494.5	483.6	490.3	541.2	569.1
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	52.7	56.2	56.5	58.7	64.0	69.3	74.8	82.8	89.5
Food Service	121.8	126.4	129.4	138.7	139.3	142.4	149.3	166.3	175.5
Food Stores	42.0	43.5	44.1	46.7	46.5	46.8	46.8	50.0	50.3
Local Tran. & Gas	59.1	87.1	89.7	92.2	86.8	67.7	58.8	69.4	76.4
Arts, Ent. & Rec.	81.7	81.8	82.0	85.7	84.7	84.8	87.2	94.3	97.5
Retail Sales	70.0	71.7	71.9	75.1	73.2	72.6	73.3	78.6	80.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	427.4	466.8	473.6	497.1	494.5	483.6	490.3	541.2	569.1
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	63.7	64.9	61.3	66.8	71.6	89.8	100.3	112.3	118.0
Arts, Ent. & Rec.	40.7	29.1	32.0	34.5	39.0	39.2	40.6	41.7	46.7
Retail**	17.5	17.7	17.3	18.0	18.2	18.8	19.6	21.1	21.9
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*	11.7	12.8	13.1	14.6	16.1	3.1	4.3	9.9	9.2
Total	133.5	124.6	123.8	133.9	144.9	150.9	164.8	185.0	195.7
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	3,300	3,240	2,950	3,110	3,290	3,940	4,220	4,390	4,430
Arts, Ent. & Rec.	1,890	1,500	1,580	1,590	1,750	1,790	1,700	1,660	1,770
Retail**	610	610	600	620	610	620	640	650	660
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*	440	430	430	430	450	110	150	260	230
Total	6,240	5,780	5,560	5,750	6,100	6,450	6,710	6,960	7,090
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	16.7	16.8	16.5	17.5	18.1	19.3	20.6	23.2	25.2
State Tax Receipts	21.9	24.1	24.3	24.4	23.7	24.1	24.8	27.8	29.4
Total	38.6	40.9	40.8	41.9	41.8	43.4	45.5	51.0	54.6

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.

NAVAJO COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	246.0	263.8	278.5	280.8	283.0	282.7	288.6	311.9	321.8
Other Travel*	16.8	24.9	25.4	24.8	24.5	19.3	16.9	18.8	21.2
Total	262.8	288.7	303.9	305.7	307.4	302.1	305.5	330.7	343.0
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	112.7	115.2	128.1	130.4	131.3	134.1	139.0	157.4	161.8
Private Home	48.3	57.1	58.5	57.7	58.2	55.8	55.3	57.7	59.4
Campground	15.9	17.6	16.4	16.8	16.2	16.1	16.3	16.8	17.8
Vacation Home	44.4	46.7	47.4	47.9	48.9	48.9	50.0	50.4	52.0
Day Travel	24.6	27.2	28.1	28.1	28.3	27.8	28.0	29.6	30.8
Total	246.0	263.8	278.5	280.8	283.0	282.7	288.6	311.9	321.8
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	50.3	50.5	55.0	56.5	57.0	59.5	63.3	69.7	69.5
Food Service	64.2	66.6	70.7	72.2	74.3	77.6	81.7	88.5	92.9
Food Stores	18.9	20.1	20.4	20.6	21.2	21.8	21.9	22.4	22.7
Local Tran. & Gas	27.2	40.7	42.7	41.7	40.4	32.3	28.2	32.0	35.4
Arts, Ent. & Rec.	29.7	29.6	30.0	30.2	30.3	30.9	31.9	33.2	34.1
Retail Sales	55.7	56.2	59.6	59.7	59.7	60.7	61.7	66.0	67.4
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	246.0	263.8	278.5	280.8	283.0	282.7	288.6	311.9	321.8
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	46.2	47.6	52.1	53.5	54.5	58.7	61.1	67.2	70.6
Arts, Ent. & Rec.	12.3	18.3	21.7	21.8	22.8	23.3	24.3	25.8	29.7
Retail**	10.1	10.4	10.5	10.4	10.9	11.5	12.1	12.4	12.1
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*	0.9	0.8	0.8	0.8	0.8	0.8	0.8	0.9	0.9
Total	69.5	77.1	85.2	86.5	89.0	94.3	98.2	106.3	113.3
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	2,160	2,250	2,300	2,330	2,350	2,420	2,450	2,490	2,520
Arts, Ent. & Rec.	580	810	890	900	940	1,040	1,040	1,090	1,140
Retail**	410	410	420	410	420	440	460	440	430
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	40	40	40	40	40	40	40	40
Total	3,210	3,510	3,650	3,690	3,760	3,940	4,000	4,070	4,130
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	10.1	10.7	11.4	10.9	11.1	12.1	12.6	13.9	14.8
State Tax Receipts	12.3	14.1	14.9	14.2	13.8	14.3	14.6	15.9	16.7
Total	22.4	24.8	26.3	25.0	24.9	26.3	27.2	29.8	31.5

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.

PIMA COUNTY

Travel Impacts, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	1,967.4	2,051.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5	2,467.0
Other Travel*	434.0	544.1	634.8	573.4	575.8	531.6	514.4	549.0	554.5
Total	2,401.4	2,595.0	2,764.2	2,713.1	2,784.1	2,771.7	2,697.1	2,902.5	3,021.5
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	849.4	908.4	945.7	952.7	994.0	1,053.5	1,032.8	1,109.5	1,176.7
Private Home	427.3	467.0	467.6	460.3	474.4	473.2	469.3	497.7	520.5
Campground	27.3	31.2	32.5	31.9	31.4	30.2	29.6	30.8	32.2
Vacation Home	46.3	49.1	50.3	50.8	51.9	52.2	53.0	54.2	56.1
Day Travel	617.0	595.3	633.3	644.0	656.6	631.0	597.9	661.3	681.5
Total	1,967.4	2,051.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5	2,467.0
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	311.1	320.3	330.0	333.3	349.2	378.5	377.6	401.9	437.1
Food Service	488.0	514.1	541.6	552.2	576.5	610.5	610.0	662.4	694.0
Food Stores	134.9	130.7	137.8	140.3	146.3	146.3	138.9	149.3	151.5
Local Tran. & Gas	242.9	305.8	320.7	318.1	320.6	291.9	264.9	291.2	309.9
Arts, Ent. & Rec.	171.0	175.3	178.4	177.3	181.0	186.2	184.6	193.3	197.7
Retail Sales	431.1	401.2	423.0	428.1	432.8	423.0	401.9	436.3	441.1
Visitor Air Tran.	188.3	203.5	198.0	190.3	201.9	203.6	204.6	219.1	235.8
Total	1,967.4	2,051.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5	2,467.0
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	296.5	309.3	333.8	337.1	360.3	393.0	407.4	443.6	446.1
Arts, Ent. & Rec.	75.6	75.4	75.7	75.3	84.9	87.8	87.8	93.8	105.4
Retail**	75.3	71.7	73.4	73.2	77.5	79.4	78.1	81.3	82.4
Ground Tran.	27.5	28.3	29.5	29.2	30.9	33.4	33.2	37.9	41.8
Visitor Air Tran.	11.2	10.4	9.4	7.5	9.9	10.8	11.9	11.5	12.0
Other Travel*	51.8	54.4	83.5	64.7	67.2	69.2	74.2	74.6	64.5
Total	538.0	549.4	605.4	587.1	630.8	673.6	692.6	742.7	752.2
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	12,610	12,720	13,330	13,340	13,810	14,290	14,630	14,780	14,300
Arts, Ent. & Rec.	4,030	4,070	4,080	4,060	4,350	4,440	4,640	4,700	5,170
Retail**	2,720	2,540	2,520	2,510	2,610	2,610	2,550	2,570	2,510
Ground Tran.	730	710	740	740	750	800	800	900	950
Visitor Air Tran.	220	200	180	130	170	170	180	160	170
Other Travel*	1,520	1,400	2,110	1,820	1,750	1,750	1,900	1,860	1,570
Total	21,830	21,630	22,950	22,600	23,440	24,050	24,700	24,970	24,670
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	71.1	73.4	75.9	75.1	76.9	82.4	82.8	72.8	76.6
State Tax Receipts	100.5	112.6	118.5	112.9	111.0	115.6	114.0	125.6	132.2
Total	171.6	186.0	194.4	187.9	187.9	198.0	196.8	198.4	208.8

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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	445.0	544.1	534.7	531.8	554.5	567.8	571.6	617.4	666.0
Other Travel*	54.0	87.4	90.4	89.0	89.5	72.6	64.2	74.3	85.6
Total	499.0	631.4	625.1	620.7	644.0	640.4	635.8	691.7	751.6
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	30.7	40.0	37.8	33.3	33.4	38.1	38.9	49.0	60.8
Private Home	202.5	252.3	243.2	245.0	260.1	269.2	270.8	291.0	310.0
Campground	44.1	50.2	51.4	50.5	49.6	47.3	46.3	48.1	50.4
Vacation Home	67.7	77.0	79.5	80.5	84.2	86.2	89.4	93.5	99.0
Day Travel	100.1	124.5	122.8	122.4	127.3	127.0	126.2	135.9	145.8
Total	445.0	544.1	534.7	531.8	554.5	567.8	571.6	617.4	666.0
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	37.6	43.0	42.9	41.7	43.0	46.8	48.7	53.9	60.7
Food Service	147.1	173.5	171.1	173.3	184.7	199.0	207.8	226.3	245.3
Food Stores	43.0	49.8	49.0	49.2	52.3	55.2	55.1	57.2	59.6
Local Tran. & Gas	56.0	92.4	92.3	89.4	89.4	73.1	63.4	72.5	82.4
Arts, Ent. & Rec.	67.3	75.5	73.5	73.1	76.3	79.9	81.9	86.7	91.4
Retail Sales	94.0	109.8	105.9	105.0	108.9	113.8	114.6	120.7	126.5
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	445.0	544.1	534.7	531.8	554.5	567.8	571.6	617.4	666.0
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	64.3	75.4	79.4	76.8	78.1	84.8	103.7	114.3	117.6
Arts, Ent. & Rec.	34.6	28.2	31.0	31.1	33.6	35.4	36.6	36.6	38.2
Retail**	19.0	21.9	20.7	20.3	22.0	23.9	24.9	26.1	27.3
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*	2.7	2.6	2.6	2.7	2.9	3.0	3.2	3.5	3.7
Total	120.6	128.2	133.7	131.0	136.6	147.1	168.4	180.5	186.9
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	2,910	3,210	3,310	3,510	3,470	3,650	4,340	4,370	4,270
Arts, Ent. & Rec.	1,170	1,210	1,310	1,270	1,300	1,350	1,470	1,400	1,390
Retail**	730	820	760	760	800	870	880	890	900
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*	140	130	120	130	140	140	140	150	150
Total	4,940	5,360	5,500	5,660	5,710	6,010	6,840	6,810	6,710
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	17.6	20.1	19.7	19.3	19.7	21.4	22.8	24.9	27.2
State Tax Receipts	23.8	29.6	29.3	28.1	27.8	29.5	30.5	33.0	35.3
Total	41.4	49.6	49.0	47.3	47.6	50.8	53.2	57.9	62.5

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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	287.3	228.2	260.0	277.7	278.2	257.5	226.7	231.1	219.6
Other Travel*	7.2	10.9	11.2	10.8	10.5	8.3	7.0	8.0	8.9
Total	294.5	239.2	271.2	288.5	288.6	265.8	233.8	239.1	228.4
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	28.2	28.0	31.0	35.1	32.6	39.2	32.8	35.0	37.4
Private Home	31.3	36.4	38.2	38.0	36.0	35.8	33.3	35.7	37.3
Campground	1.2	1.3	1.4	1.3	1.3	1.3	1.2	1.3	1.3
Vacation Home	1.2	1.3	1.3	1.3	1.3	1.3	1.3	1.4	1.4
Day Travel	225.5	161.2	188.2	201.9	206.9	179.9	158.0	157.8	142.1
Total	287.3	228.2	260.0	277.7	278.2	257.5	226.7	231.1	219.6
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	12.4	11.9	12.8	14.0	13.4	16.4	14.0	15.1	15.9
Food Service	42.6	37.0	41.5	44.8	44.4	45.4	42.0	44.2	44.4
Food Stores	105.4	76.1	88.6	95.3	98.9	88.3	77.6	77.0	69.5
Local Tran. & Gas	17.6	22.3	25.0	25.5	23.9	18.6	14.5	16.1	17.2
Arts, Ent. & Rec.	8.1	8.0	8.5	9.0	8.4	9.4	8.5	8.9	9.2
Retail Sales	101.2	72.9	83.7	89.1	89.1	79.3	70.1	69.8	63.4
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	287.3	228.2	260.0	277.7	278.2	257.5	226.7	231.1	219.6
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	20.1	18.4	19.1	19.8	22.3	27.7	25.3	25.8	26.8
Arts, Ent. & Rec.	4.4	4.1	4.3	4.4	5.2	5.9	5.4	5.7	6.1
Retail**	28.7	20.8	23.1	24.2	25.3	23.6	21.5	21.8	20.8
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*	0.4	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Total	53.6	43.6	46.9	48.7	53.3	57.5	52.6	53.7	54.1
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	960	870	900	930	1,040	1,220	1,110	1,030	1,020
Arts, Ent. & Rec.	300	300	290	330	390	440	400	400	400
Retail**	940	650	710	740	730	680	580	570	540
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*	20	20	20	20	20	20	20	20	20
Total	2,220	1,840	1,920	2,020	2,180	2,360	2,110	2,010	1,980
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	8.8	7.2	7.9	8.1	8.0	8.2	7.3	7.8	7.8
State Tax Receipts	11.1	9.9	11.1	11.1	10.6	10.4	9.3	9.6	9.5
Total	19.9	17.1	18.9	19.1	18.6	18.5	16.6	17.4	17.3

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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	539.7	596.9	631.9	650.8	680.9	706.6	725.5	800.0	879.3
Other Travel*	45.9	60.6	62.8	64.1	65.3	41.6	37.6	48.6	70.2
Total	585.6	657.5	694.7	714.9	746.2	748.2	763.1	848.6	949.5
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	198.3	221.3	245.6	261.6	282.8	311.4	330.6	384.4	442.5
Private Home	72.3	85.4	87.5	87.8	89.6	87.3	86.3	92.3	96.8
Campground	12.2	13.2	13.8	13.5	14.7	14.6	14.8	15.2	16.1
Vacation Home	23.5	24.7	25.4	25.8	26.7	27.0	27.7	28.5	29.5
Day Travel	233.4	252.2	259.6	262.0	267.1	266.3	266.1	279.6	294.4
Total	539.7	596.9	631.9	650.8	680.9	706.6	725.5	800.0	879.3
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	100.4	109.6	122.7	133.3	147.4	169.7	187.1	217.9	249.8
Food Service	111.2	120.0	127.1	132.4	139.9	149.2	155.7	171.8	189.5
Food Stores	40.1	43.1	44.4	45.3	47.6	49.6	49.4	51.3	53.5
Local Tran. & Gas	52.8	81.0	85.7	84.9	84.4	68.5	59.3	68.5	78.7
Arts, Ent. & Rec.	159.2	162.9	168.3	170.9	176.0	182.0	185.8	197.2	209.8
Retail Sales	75.1	79.3	81.8	83.0	84.7	87.0	87.5	92.1	97.3
Visitor Air Tran.	0.9	1.0	1.8	1.0	0.8	0.7	0.8	1.3	0.8
Total	539.7	596.9	631.9	650.8	680.9	706.6	725.5	800.0	879.3
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	73.9	77.7	85.8	93.1	100.6	114.9	125.1	137.4	150.5
Arts, Ent. & Rec.	66.0	63.0	64.4	63.4	67.2	69.7	71.7	77.2	83.8
Retail**	16.2	17.0	17.1	17.1	18.2	19.6	20.3	21.6	22.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.4	0.3	0.4	0.3	0.3	0.5	0.7	0.9	0.7
Other Travel*	6.5	5.7	5.9	6.7	7.4	2.4	2.9	5.4	11.6
Total	163.0	163.8	173.5	180.5	193.8	207.1	220.7	242.5	269.3
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	3,120	3,180	3,430	3,590	3,810	4,110	4,370	4,520	4,740
Arts, Ent. & Rec.	3,640	3,410	3,430	3,460	3,790	3,840	3,820	4,080	4,170
Retail**	660	670	660	660	690	720	730	740	770
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*	260	210	200	190	200	100	110	150	220
Total	7,690	7,470	7,730	7,910	8,500	8,790	9,040	9,510	9,910
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	23.7	24.9	26.2	28.1	30.0	33.2	35.5	40.5	46.4
State Tax Receipts	26.2	30.0	31.6	30.9	31.1	33.1	34.2	37.9	41.9
Total	49.9	54.9	57.8	59.0	61.1	66.3	69.6	78.4	88.3

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, 2009-2018p

Total Direct Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Destination Spending	568.7	589.5	594.5	575.1	590.4	574.7	564.1	588.2	597.7
Other Travel*	43.7	60.9	62.3	60.2	60.8	48.6	42.0	48.0	53.2
Total	612.4	650.4	656.7	635.3	651.2	623.3	606.1	636.2	650.9
Visitor Spending by Type of Traveler Accommodation (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Hotel, Motel, STVR***	128.8	151.2	149.2	131.9	137.7	145.8	150.6	165.5	166.1
Private Home	73.5	90.6	87.7	86.7	90.8	88.6	87.2	91.6	94.7
Campground	72.8	79.2	72.9	68.0	66.9	65.3	64.9	66.8	70.4
Vacation Home	43.0	47.4	48.2	48.5	49.5	49.6	50.4	51.7	53.9
Day Travel	250.7	221.1	236.3	240.0	245.4	225.4	211.0	212.7	212.5
Total	568.7	589.5	594.5	575.1	590.4	574.7	564.1	588.2	597.7
Visitor Spending By Commodity Purchased (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accommodations	61.6	67.5	65.2	59.0	62.1	67.2	70.4	77.1	78.7
Food Service	108.2	115.1	116.5	113.8	119.2	122.4	126.0	133.4	136.8
Food Stores	78.8	69.2	73.5	75.1	78.4	74.3	69.6	69.0	68.3
Local Tran. & Gas	52.0	79.2	79.4	74.2	73.2	57.5	49.2	55.0	59.9
Arts, Ent. & Rec.	120.8	129.6	124.4	115.6	117.6	120.6	123.7	128.5	129.8
Retail Sales	135.8	116.4	123.7	124.9	126.4	117.6	110.9	110.4	108.5
Visitor Air Tran.	11.5	12.3	11.7	12.5	13.6	15.0	14.4	14.9	15.6
Total	568.7	589.5	594.5	575.1	590.4	574.7	564.1	588.2	597.7
Industry Earnings Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	60.7	63.0	63.7	63.7	64.6	68.7	73.0	78.4	82.5
Arts, Ent. & Rec.	50.4	50.5	52.0	45.5	48.5	49.9	51.5	54.4	54.1
Retail**	30.9	27.1	27.7	27.5	29.1	28.5	27.9	28.2	29.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.6	0.8	0.3	0.3	0.3	0.4	0.5	0.7	0.8
Other Travel*	2.8	3.0	2.3	2.5	2.6	2.0	2.2	2.8	2.9
Total	145.3	144.4	145.9	139.4	145.2	149.5	155.1	164.5	169.4
Industry Employment Generated by Travel Spending (Jobs)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	2,870	2,920	2,840	2,850	2,830	2,940	3,060	3,040	3,060
Arts, Ent. & Rec.	2,050	2,200	2,490	2,160	2,190	2,340	2,360	2,290	2,240
Retail**	1,090	930	920	900	930	890	850	820	810
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	20	10	10	10	10	10	20	20
Other Travel*	100	100	90	90	90	80	80	90	90
Total	6,130	6,170	6,340	6,010	6,050	6,260	6,370	6,250	6,210
Tax Receipts Generated by Travel Spending (\$Million)									
	2009	2011	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	22.1	22.0	21.9	20.8	21.1	21.6	21.9	22.4	23.4
State Tax Receipts	26.4	28.9	29.1	27.0	26.3	26.5	26.4	28.1	28.9
Total	48.5	50.9	50.9	47.7	47.4	48.1	48.3	50.5	52.2

Details may not add to total due to rounding.

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

**Retail includes gasoline.

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

APPENDICES

Appendix A	2018 Travel Impact Estimates
Appendix B	Key Terms and Definitions
Appendix C	Regional Travel Impact Model
Appendix D	Travel Industry Accounts
Appendix E	Arizona Earnings and Employment by Industry Sector
Appendix F	Industry Groups

2018 TRAVEL IMPACT ESTIMATES

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

DIRECT IMPACTS

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

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

PRELIMINARY ESTIMATES

Preliminary estimates for 2018 were prepared at the state, regional and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2018 becomes available.

TRANSPORTATION IMPACTS

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

SECONDARY (INDIRECT AND INDUCED) IMPACTS

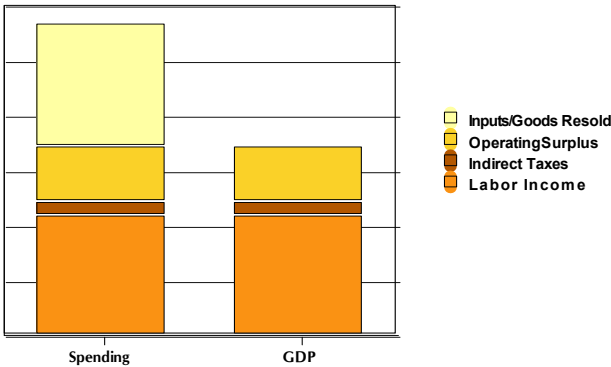
Direct impacts are reported for all counties within Arizona. Secondary employment and earnings impacts over and above direct impacts are reported at the state level only for the year 2018. These indirect and induced impacts are generated from the direct impacts produced by the RTIM, discussed above, and an input-output model of the Arizona economy prepared by the IMPLAN Group, Inc. Indirect impacts represent the purchases of goods and services from other firms by businesses that directly receive expenditures from travelers. Hotels, for example, purchase maintenance services from independent contractors. Induced impacts represent the purchase of goods and services by employees whose earnings are in part derived from travel expenditures. The sum of the direct,

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

GROSS DOMESTIC PRODUCT

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

Relationship Between Spending and Gross Domestic Product



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

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

INTERPRETATION OF IMPACT ESTIMATES

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

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

DEFINITION OF TERMS

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

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

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

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

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

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

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

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

Private Home: Unpaid overnight accommodations of friends and relatives.

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

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

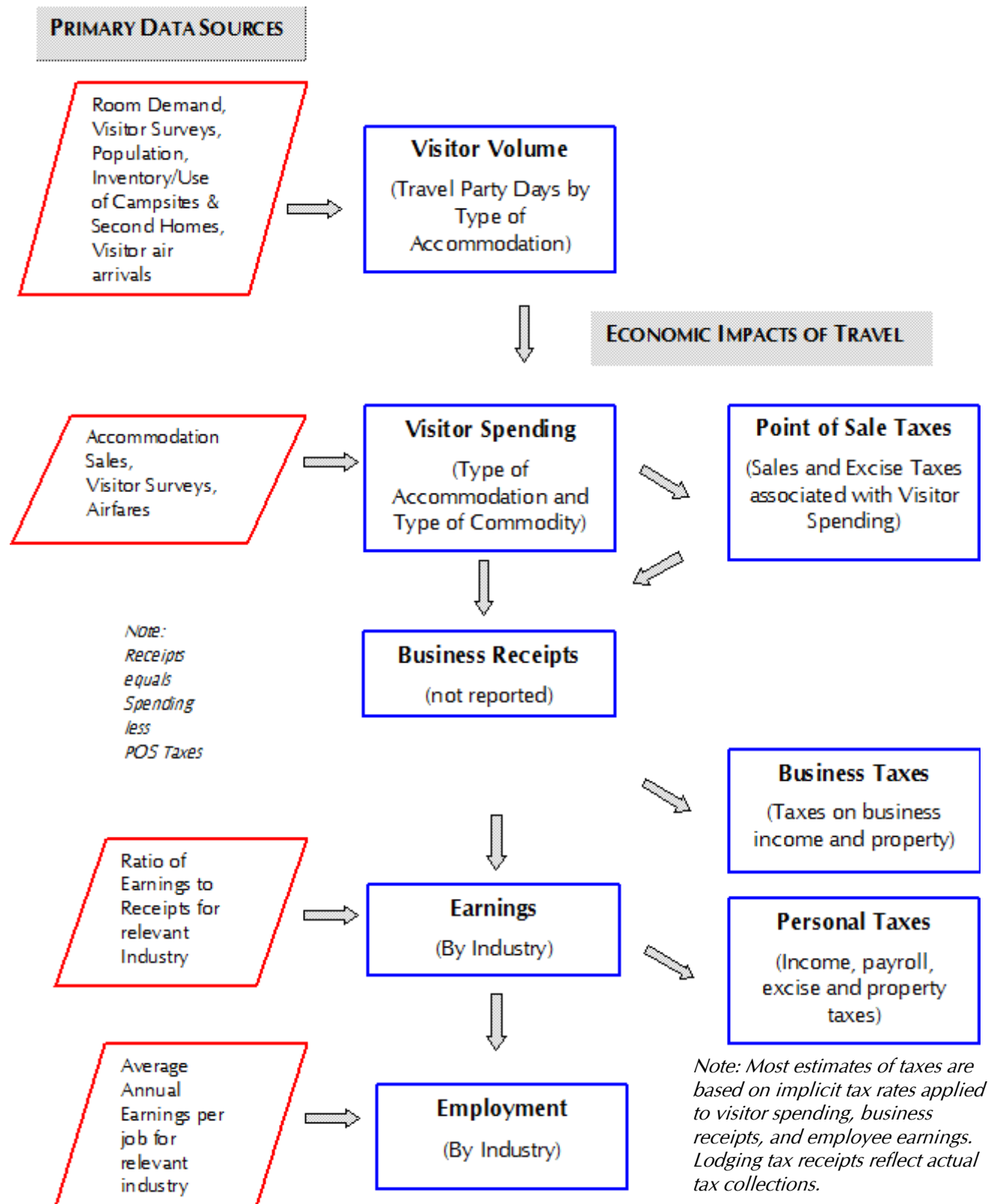
STVR: Acronym for Short Term Vacation Rentals. STVR includes lodging using "shared economy" services.

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

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

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

REGIONAL TRAVEL IMPACT MODEL



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

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

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

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

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

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

PRIMARY CONCEPTS, CATEGORIES & DATA REQUIREMENTS

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

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

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

TRAVEL INDUSTRY

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

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

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

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

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

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

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

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

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

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

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

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

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

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

RTIM Travel Impact Industries Matched to NAICS

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

Source: Dean Runyan Associates

DEMAND SEGMENTS

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

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

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

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

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

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

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

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

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

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

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

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

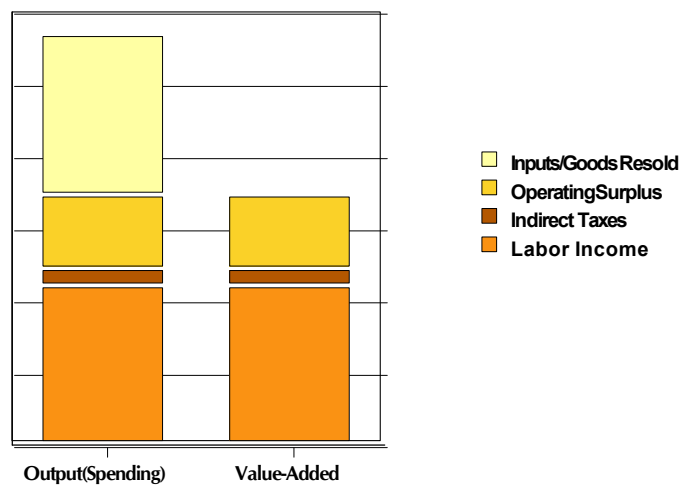
COMPONENTS OF INDUSTRY OUTPUT

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

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

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

Components of Industry Output



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

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

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

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

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

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

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

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

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

INDIRECT, INDUCED AND SECONDARY EFFECTS

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

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

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

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

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

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

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

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

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

Arizona Earnings and Employment by Industry Sector, 2017

Industry Sector	Earnings (\$Billion)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	19.0	9.4%	252	6.8%
Agriculture, Forestry, Fishing and related	2.4	1.2%	47	1.3%
Mining	1.5	0.7%	24	0.6%
Manufacturing	15.1	7.5%	181	4.8%
**Travel	7.0	3.4%	188	5.0%
Primarily Non Export-Oriented	99.8	49.4%	1,924	51.6%
Construction	12.4	6.1%	203	5.5%
Utilities	1.8	0.9%	14	0.4%
Wholesale trade	9.6	4.8%	109	2.9%
Retail trade	14.3	7.1%	399	10.7%
Real estate and rental and leasing	5.8	2.9%	213	5.7%
Management of companies and enterprises	3.5	1.7%	41	1.1%
Administrative and waste services	12.6	6.3%	304	8.2%
Other services, except public administration	7.3	3.6%	191	5.1%
Government and government enterprises	32.4	16.0%	449	12.0%
Mixed	83.2	41.2%	1,552	41.6%
Transportation and warehousing	6.9	3.4%	134	3.6%
Information	4.8	2.4%	57	1.5%
Finance and insurance	15.8	7.8%	250	6.7%
Professional and technical services	15.8	7.8%	237	6.3%
Educational services	3.3	1.6%	80	2.1%
Health care and social assistance	25.4	12.6%	417	11.2%
Leisure and Hospitality	11.3	5.6%	379	10.2%
Arizona Total**	202.0	100.0%	3,728	100.0%

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

Industry Groups

Accommodation & Food Services

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

Arts, Entertainment & Recreation

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

Construction

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

Education and Health Services

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

Financial Activities

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

Information

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

Manufacturing & Utilities

(280 industries)

Natural Resources and Mining

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

Other Services

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

Professional and Business Services

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

Public Administration

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

Trade

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

Transport

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