Industry Impact
Northern Arizona
DIRECT TRAVEL SPENDING GENERATED IN 2018

$24 BILLION

Source: Dean Runyan Associates, 2018
OVERNIGHT VISITS IN 2018

45.5 MILLION

Source: Tourism Economics
DIRECT TRAVEL SPENDING GENERATED IN 2018

$3.3 BILLION

Source: Dean Runyan Associates, 2018p
2018 Year-End Impact
Northern and North Central Regions

$3.3 Billion
Total Direct Spending
7.7%

32,140 Jobs
Generated by Travel Spending
2.4%

$936 Million
Industry Earnings
7.3%

Source: Dean Runyan Associates, 2018p
Earnings and Jobs Growth
Northern and North Central Regions

Source: Dean Runyan Associates, 2018
Visitor Spending
Northern and North Central Regions

<table>
<thead>
<tr>
<th>Category</th>
<th>Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>$914M</td>
</tr>
<tr>
<td>Local Transportation</td>
<td>$291M</td>
</tr>
<tr>
<td>Arts, Entertainment, Recreation</td>
<td>$570M</td>
</tr>
<tr>
<td>Retail</td>
<td>$384M</td>
</tr>
<tr>
<td>Food Service</td>
<td>$754M</td>
</tr>
<tr>
<td>Visitor Air Transportation</td>
<td>$13M</td>
</tr>
</tbody>
</table>

Source: Dean Runyan Associates, 2018
Visitor Spending by Commodity
Northern and North Central Regions

Source: Dean Runyan Associates, 2018
Visitor Spending by Commodity
Northern and North Central Regions

Source: Dean Runyan Associates, 2018
Spending by Accommodation Type

Apache
- Hotel, Motel, STVR: 36%
- Campground: 13%
- Day Travel: 7%
- Other: 5%

Navajo
- Hotel, Motel, STVR: 39%
- Campground: 16%
- Day Travel: 10%
- Other: 6%

Coconino
- Hotel, Motel, STVR: 73%
- Campground: 4%
- Day Travel: 3%
- Other: 2%

Yavapai
- Hotel, Motel, STVR: 50%
- Day Travel: 11%
- Other: 3%

Gila
- Hotel, Motel, STVR: 53%
- Campground: 15%
- Day Travel: 22%
- Other: 5%

Source: Dean Runyan Associates, 2018
Taxes Generated by Visitor Spending
Northern and North Central Regions

$154 Million
Local Taxes

$146 Million
State Taxes

Source: Dean Runyan Associates, 2018p
Taxes Generated per Household
North Central Region

$1,060  |  $880
Gila County | Yavapai County

Source: Dean Runyan Associates, 2018
Taxes Generated per Household
Northern Region

- Apache County: $440
- Coconino County: $2,970
- Navajo County: $860

Source: Dean Runyan Associates, 2018
Economic Impact

Arizona’s warm weather and magnificent natural beauty made tourism the number one export industry in Arizona in 2018. 45.5 million people visited Arizona in 2018 who collectively spent $24.4 billion in the state. The money spent by visitors supports jobs and generates tax revenue. The $3.63 billion in 2018 tax revenue equals an annual tax savings of $1,360 for every Arizona household and supported 192,000 industry jobs.

Overnight Visitation
45.5 million
Total Overnight Visitation, 2018
Taxes
$3.63 billion
Total Tax Revenue, 2018

Visitor Spending
$24.4 billion
Direct Travel Spending, 2018
Jobs
192 thousand
Total Generated Employment, 2018

Arizona Travel Impacts 2000-2018

Arizona Office of Tourism commissions an annual study to examine the economic impact of the travel industry in the state and presents the updated data at the annual Governor’s Conference on Tourism. The following reports detail the impact of the travel industry to the state and each of its five regions and fifteen counties. The second report presents the same information by legislative district.

- Arizona Travel Impacts 2000–2018
- Arizona Travel Impacts by Legislative District 2000–2018

www.tourism.az.gov/economic-impact/
Statewide Domestic Overnight Visitation

<table>
<thead>
<tr>
<th></th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Million 2016</td>
<td>10.1</td>
<td>9.6</td>
<td>8.9</td>
<td>8.8</td>
</tr>
<tr>
<td>Million 2017</td>
<td>10.3</td>
<td>9.8</td>
<td>9.1</td>
<td>9.1</td>
</tr>
<tr>
<td>Million 2018</td>
<td>10.5</td>
<td>10.1</td>
<td>9.5</td>
<td>9.5</td>
</tr>
<tr>
<td>Million 2019</td>
<td>10.8</td>
<td>10.1</td>
<td>9.5</td>
<td>9.5</td>
</tr>
</tbody>
</table>

Source: Tourism Economics
YOY Domestic Visitation Growth

Source: Tourism Economics
Business vs. Leisure Growth

Source: Tourism Economics
Northern
- Business: 7%
- Leisure: 93%

North Central
- Business: 5%
- Leisure: 95%

Arizona
- Business: 17%
- Leisure: 83%

Source: Longwoods International
YOY Domestic Visitation Growth

Source: Tourism Economics
International Visa Card Spending
Northern Region

Q1 2019 (January-March)
- Canada: -17.4%
- China: -9.7%
- France: -9.8%
- Germany: 0.6%
- Japan: 1.3%
- United Kingdom: 2.1%
- Australia: -3.9%
- Mexico: -5.0%
- South Korea: -0.1%
- Spain: -18.6%

Q2 2019 (April-June)
- Canada: -1.5%
- Germany: -7.3%
- France: -18.7%
- China: -25.6%
- United Kingdom: -7.5%
- Japan: 20.1%
- Australia: 8.3%
- Italy: -12.3%
- Spain: 4.1%
- Netherlands: 4.1%

Source: VisaVue
International Visa Card Spending
North Central Region

Q1 2019 (January-March)  
- CANADA: -12.7%
- JAPAN: 6.5%
- UNITED KINGDOM: 7.9%
- AUSTRALIA: 3.5%
- CHINA: -16.7%
- GERMANY: 2.9%
- FRANCE: 7.9%
- MEXICO: 7.2%
- SOUTH KOREA: 9.0%
- SWITZERLAND: -6.4%

Q2 2019 (April-June)  
- CANADA: -3.3%
- JAPAN: 7.8%
- UNITED KINGDOM: 82.2%
- GERMANY: -1.4%
- CHINA: 0.4%
- AUSTRALIA: 45.7%
- FRANCE: 54.3%
- ITALY: 0.4%
- MEXICO: 45.7%
- SWITZERLAND: -29.2%

Source: VisaVue
Thank you

cfloyd@touism.az.gov