Industry Impact
Phoenix & Central Region
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

$16 BILLION

Source: Dean Runyan Associates, 2018
2018 Year-End Impact
Phoenix & Central Region

$16.1 Billion
Total Direct Spending
9%

114,370 Jobs
Generated by Travel Spending
3%

$5.1 Billion
Industry Earnings
7%

Source: Dean Runyan Associates, 2018p
Earnings and Jobs Growth

Source: Dean Runyan Associates, 2018p
Visitor Spending
Phoenix & Central Region

- Accommodations: $2.5 Billion
- Arts, Entertainment, Recreation: $1.5 Billion
- Food Service: $3.2 Billion
- Local Transportation: $1.4 Billion
- Retail: $1.7 Billion
- Visitor Air Transportation: $1.9 Billion

Source: Dean Runyan Associates, 2018
Visitor Spending by Commodity
Phoenix & Central Region

Source: Dean Runyan Associates, 2018p
Percent of Visitor Spend
Phoenix & Central Region

2008: 21.5%
2009: 23.3%
2010: 23.2%
2011: 22.9%
2012: 23.2%
2013: 23.4%
2014: 23.5%
2015: 23.9%
2016: 24.7%
2017: 24.9%
2018: 25.1%

Source: Dean Runyan Associates, 2018
Percent of Visitor Spend
Phoenix & Central Region

Source: Dean Runyan Associates, 2018
Percent of Visitor Spend
Phoenix & Central Region

Source: Dean Runyan Associates, 2018p
Percent of Visitor Spend
Phoenix & Central Region

Source: Dean Runyan Associates, 2018
Taxes Generated by Visitor Spending
Phoenix & Central Region

$800 Million
Local Taxes

$638 Million
State Taxes

Source: Dean Runyan Associates, 2018
Taxes Generated per Household
Phoenix & Central Region

$850  Maricopa County
$420  Pinal County

Source: Dean Runyan Associates, 2018
Looking Forward
# 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>2016</td>
<td>10.1</td>
<td>9.6</td>
<td>8.9</td>
<td>8.8</td>
</tr>
<tr>
<td>2017</td>
<td>10.3</td>
<td>9.8</td>
<td>9.1</td>
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<tr>
<td>2018</td>
<td>10.5</td>
<td>10.1</td>
<td>9.5</td>
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<tr>
<td>2019</td>
<td>10.8</td>
<td>10.1</td>
<td>9.5</td>
<td>9.5</td>
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</tbody>
</table>

Source: Tourism Economics
YOY Domestic Visitation Growth

Source: Tourism Economics
Business vs. Leisure Growth

Source: Tourism Economics
YOY Domestic Visitation Growth

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<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>2.03%</td>
<td>2.38%</td>
<td>2.54%</td>
<td>3.16%</td>
</tr>
<tr>
<td>2018</td>
<td>2.10%</td>
<td>3.27%</td>
<td>3.92%</td>
<td>3.85%</td>
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<tr>
<td>2019</td>
<td>1.97%</td>
<td></td>
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</tbody>
</table>

Source: Tourism Economics
International Visa Card Spending
Phoenix & Central Region

Q1 2019 (January-March)
- CANADA: -10%
- CHINA: -16%
- MEXICO: -3%
- UNITED KINGDOM: 8%
- JAPAN: -10%
- AUSTRALIA: -1%
- GERMANY: -6%
- FRANCE: -8%

Q2 2019 (April-June)
- CANADA: -8%
- MEXICO: 26%
- CHINA: -2%
- UNITED KINGDOM: 8%
- GERMANY: -8%
- JAPAN: 22%
- AUSTRALIA: 18%
- FRANCE: 5%
Thank you