

# *Tucson & Southern Region 2018 Year-End Data Review*

October 16, 2019







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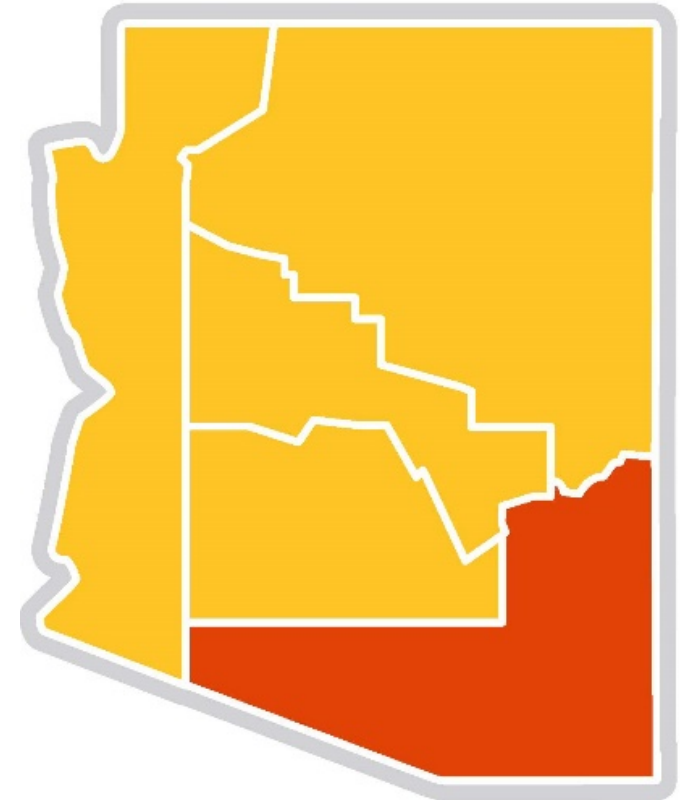
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# Agenda

- ❖ Statewide Overview
- ❖ Economic Impact of Tourism
- ❖ Year-To-Date Indicators
- ❖ Average Domestic Spending
- ❖ Regional International Visa Card Spending Profile
- ❖ Regional Visitor Profile

Presentation slides available at:

<http://tourism.az.gov/regional-profiles/>



# Regional Profiles

<http://tourism.az.gov/regional-profiles/>



# Primary Research Partners



- Visitor profile
- Domestic travel only
- Continuous nationally representative online survey
- Delivered annually
- Regional visitor volume
- Visitor origins
- Visitor demographics
- Activities participated
- Average per party spending
- State and regional level



- Economic impact of travel
- Econometric model
- Domestic and international spending
- Delivered annually
- Jobs, earnings, taxes generated
- Spending by accommodation type
- Spending by commodity purchased
- Regional, county, and legislative district-level data



- Visitor volumes estimated via an econometric model
- International visitation (delivered annually)
- Domestic visitation (delivered quarterly)
- Multiple data points to estimate state visitor volume
- State level only



- Visa® card spending data
- International travel only
- Delivered quarterly and annually
- Spending by country, market segment, market category
- Seasonal spending
- State and regional level



# Economic Impact of Travel 2018

Tucson & Southern Region





# Visitor Spending & Economic Impact

<http://tourism.az.gov/economic-impact/>



## 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](#)

# 2018 Arizona Tourism Industry Performance

45.5 million  
Overnight Visitors  
Up 3.5% YOY



\$24.4 billion  
Direct Travel Spending  
Up 7.8% YOY



# 2018 Tucson & Southern Region Tourism Industry Performance

**6.8 million**  
Domestic Overnight  
Visitors



**\$3.66 billion**  
Direct Travel Spending



# Regional Impacts, 2018

Tucson & Southern Region



**\$3.66 Billion**

Up 3.2%

Direct Travel Spending



**31,080**

Up -1.0%

Jobs



**\$262 Million**

Up 4.8%

State and Local Taxes



**\$907 Million**

Up 1.5%

Earnings



# County Impacts, 2018

Tucson & Southern Region

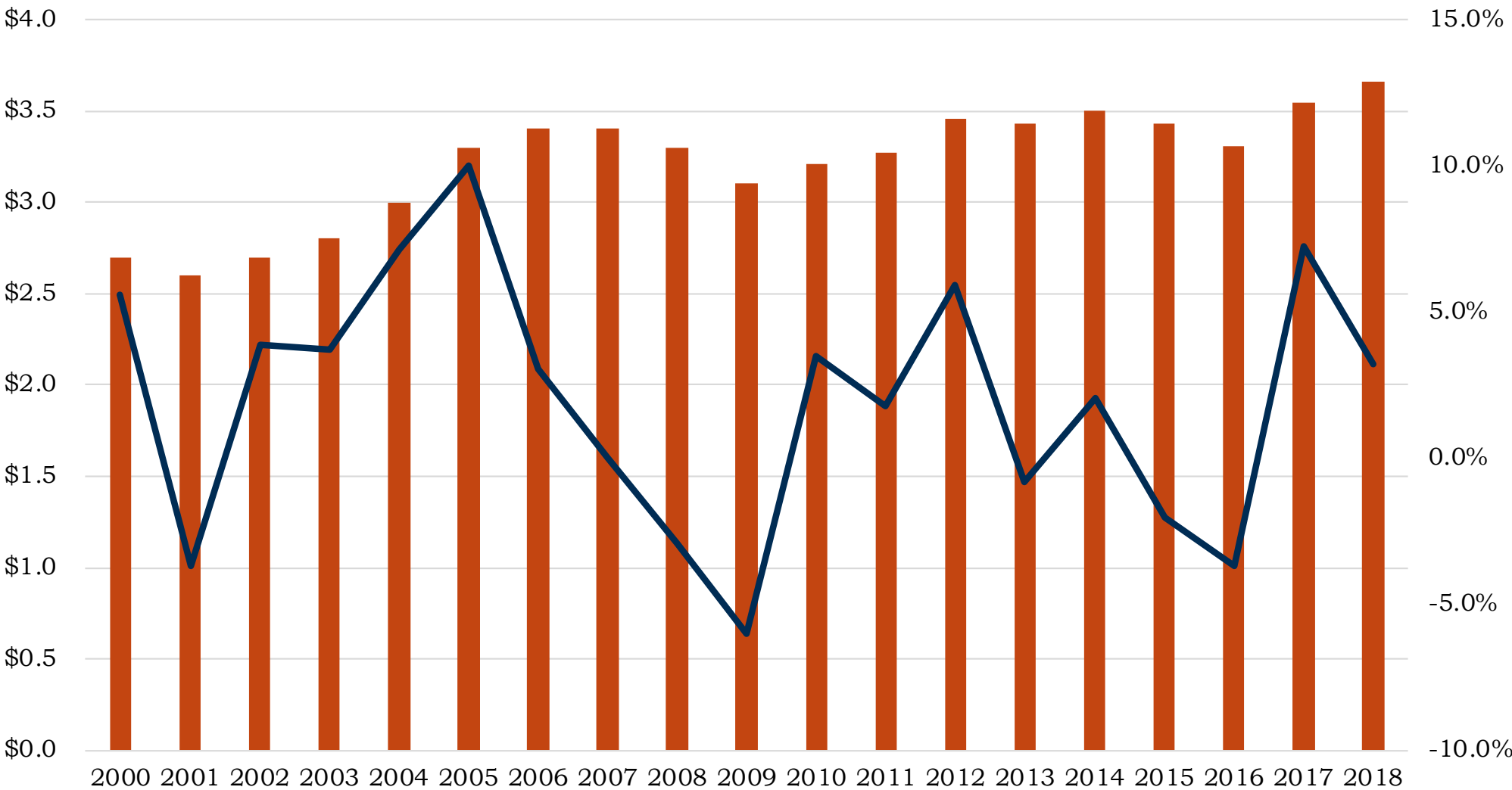
	Direct Travel Spending (\$million)	Jobs	Earnings (\$millions)	State and Local Taxes (\$millions)	Tax Revenue per Household
Cochise	\$331	3,420	\$84	\$28.9	\$590
YOY % change	1.0%	-0.3%	2.7%	2.8%	
Graham	\$64	910	\$14	\$5.7	\$500
YOY % change	1.5%	3.3%	7.2%	1.8%	
Greenlee	\$14	110	\$2	\$0.9	\$250
YOY % change	1.2%	-3.7%	-1.7%	0%	
Pima	\$3,021	24,670	\$752	\$208.8	\$510
YOY % change	4.1%	-1.2%	1.3%	5.2%	
Santa Cruz	\$228	1,980	\$54	\$17.3	\$1,140
YOY % change	-4.5%	-1.7%	0.6%	-0.6%	





# Regional Direct Travel Spending

Tucson & Southern Region

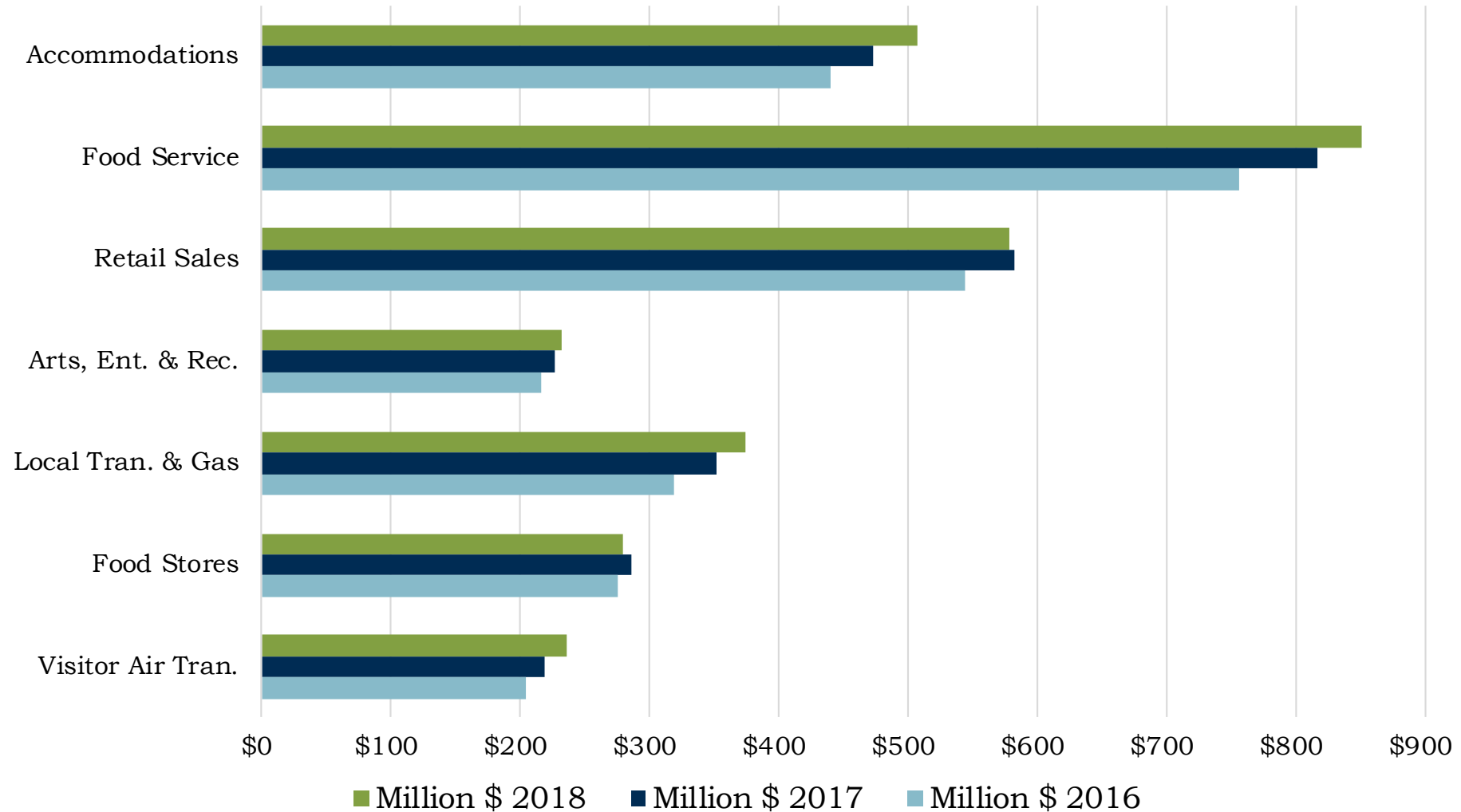


Source: Dean Runyan Associates

■ Billion \$    — Change

# Spending by Commodity Purchased

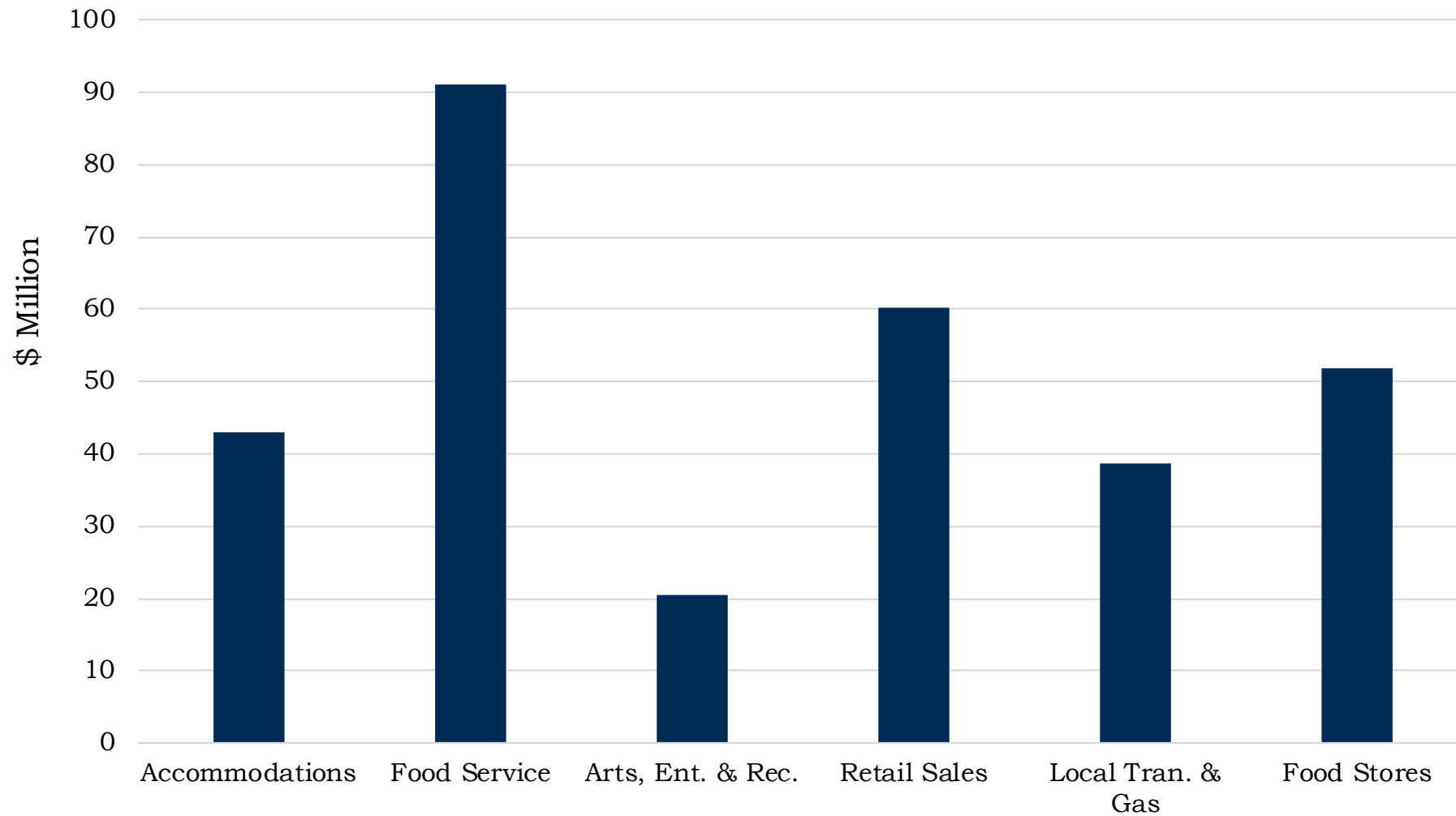
Tucson & Southern Region



Source: Dean Runyan Associates

# Spending by Commodity Purchased

## Cochise County



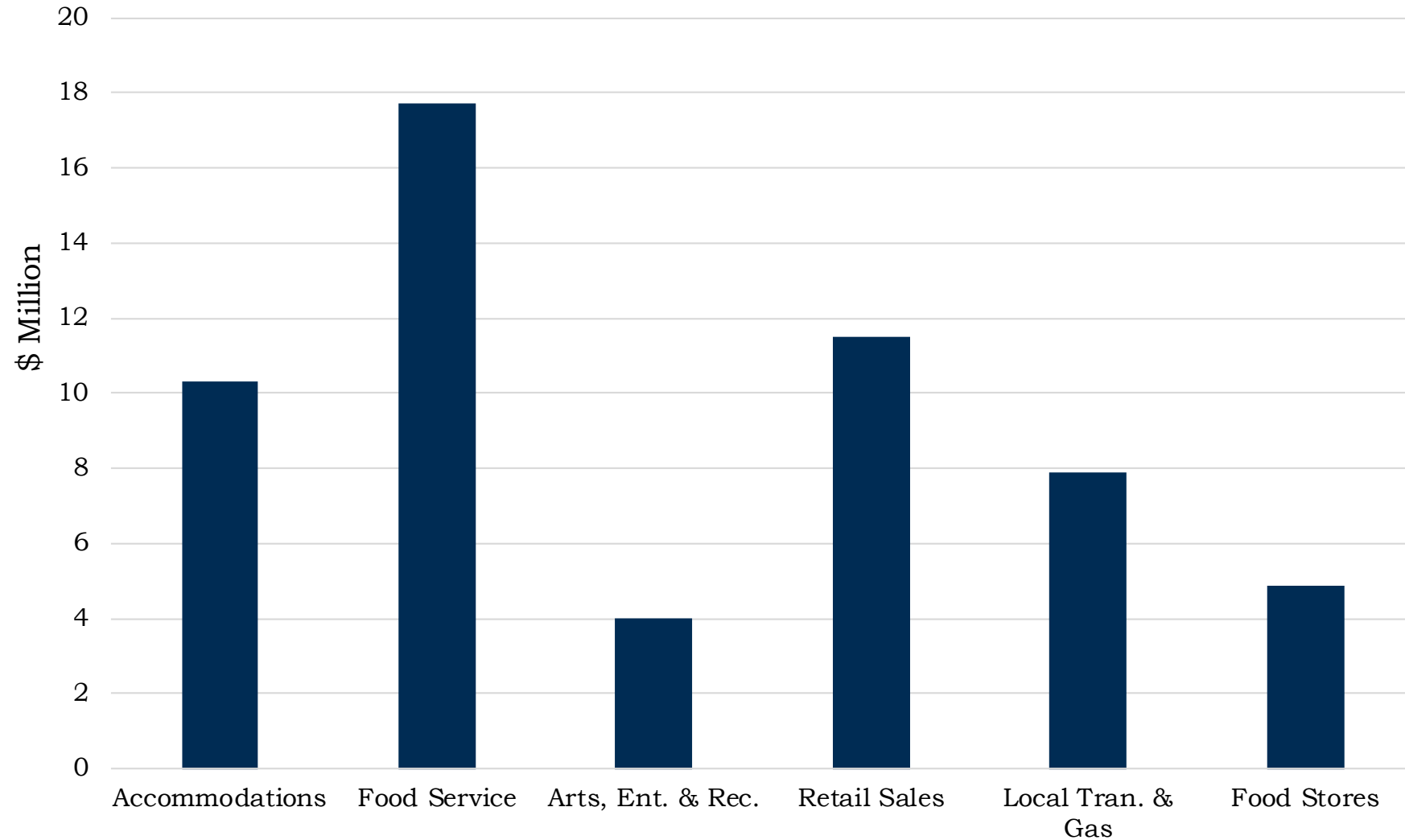
Source: Dean Runyan Associates, 2018





# Spending by Commodity Purchased

Graham County

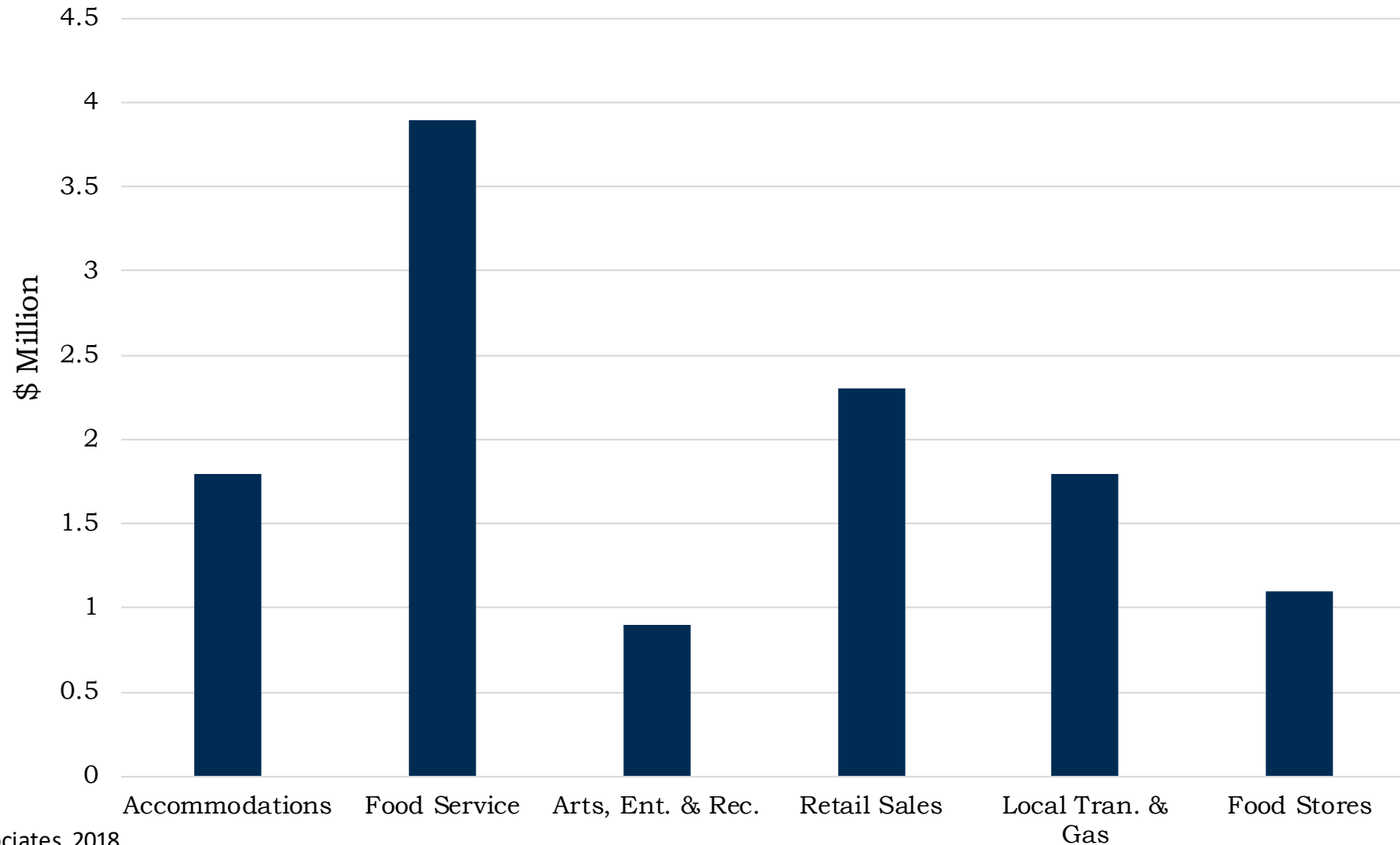


Source: Dean Runyan Associates, 2018



# Spending by Commodity Purchased

Greenlee County

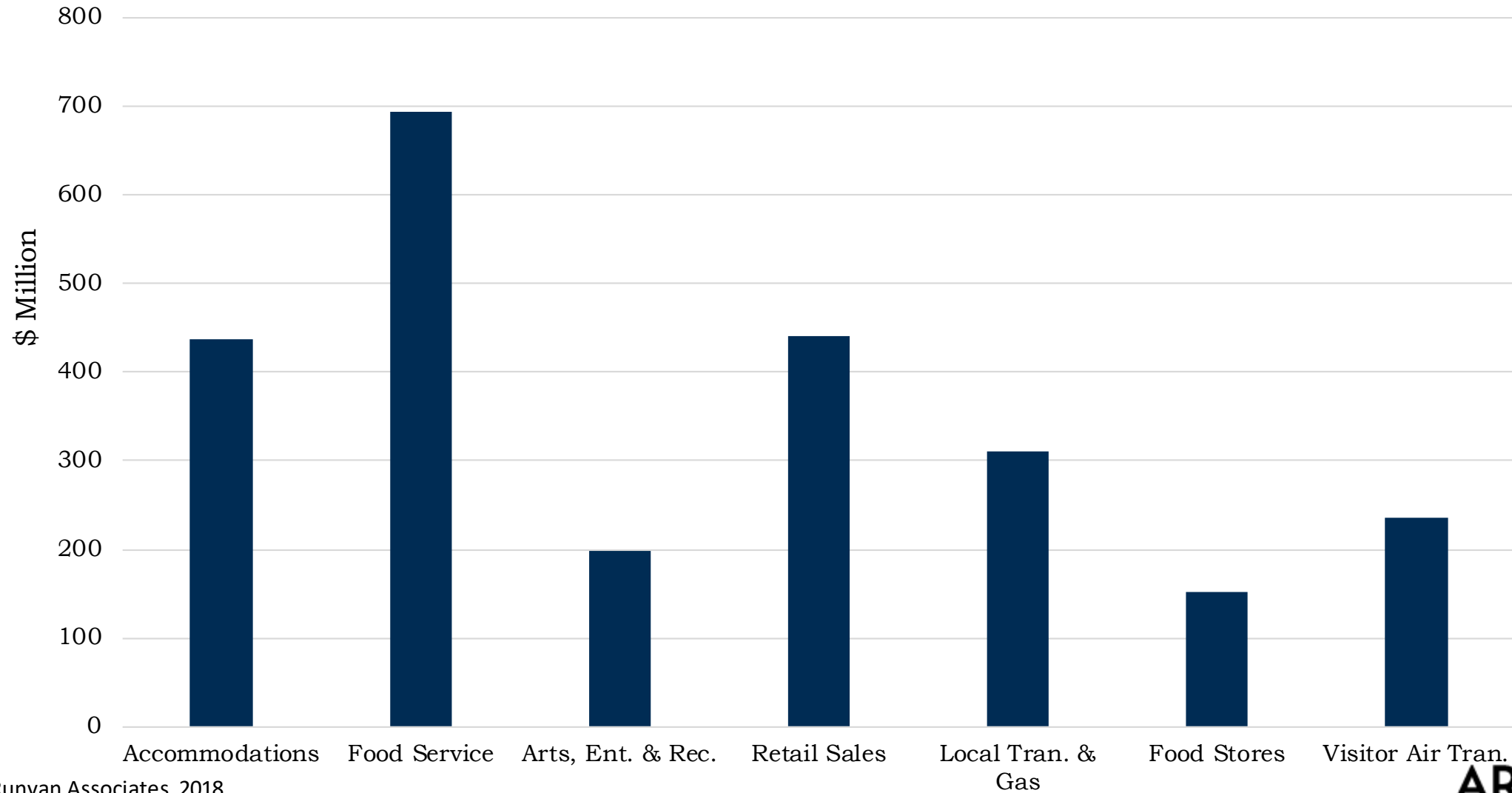


Source: Dean Runyan Associates, 2018



# Spending by Commodity Purchased

Pima County



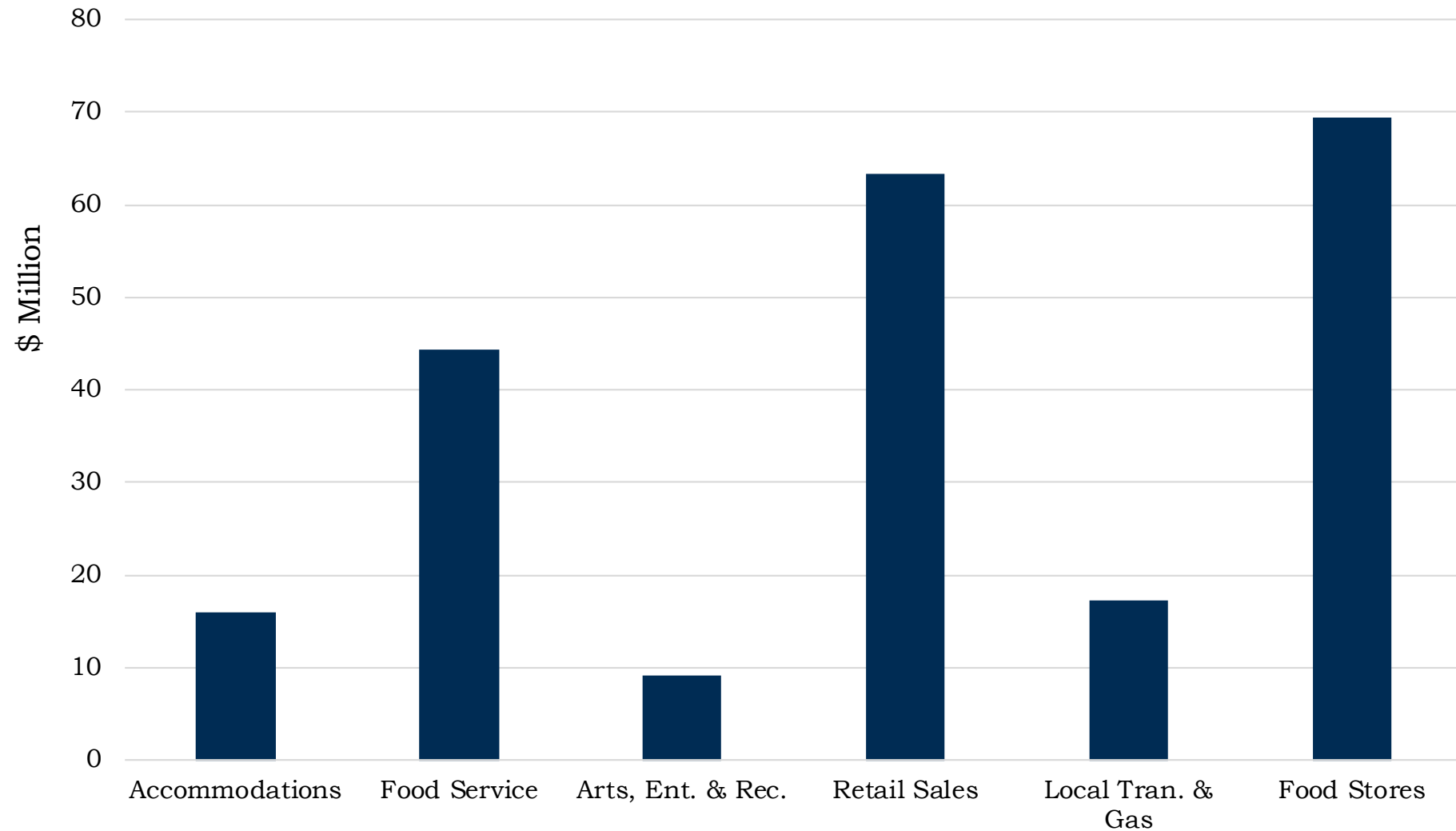
Source: Dean Runyan Associates, 2018





# Spending by Commodity Purchased

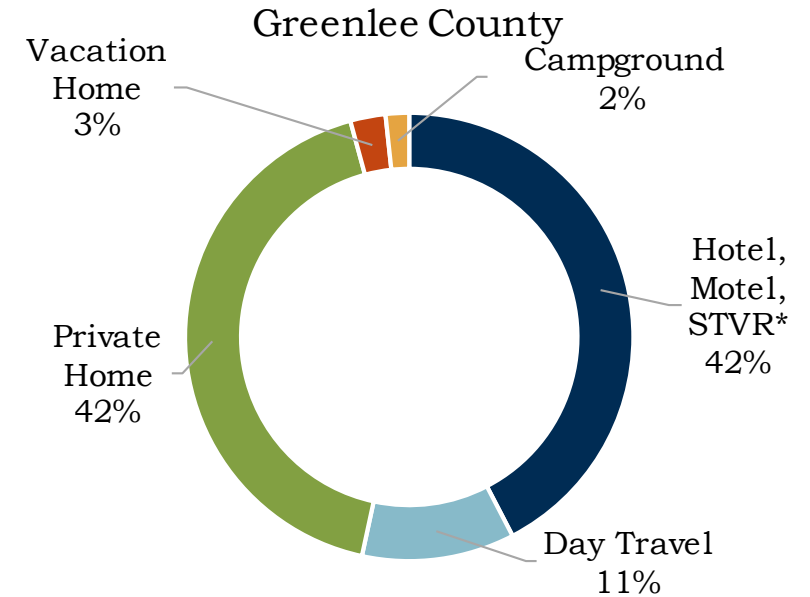
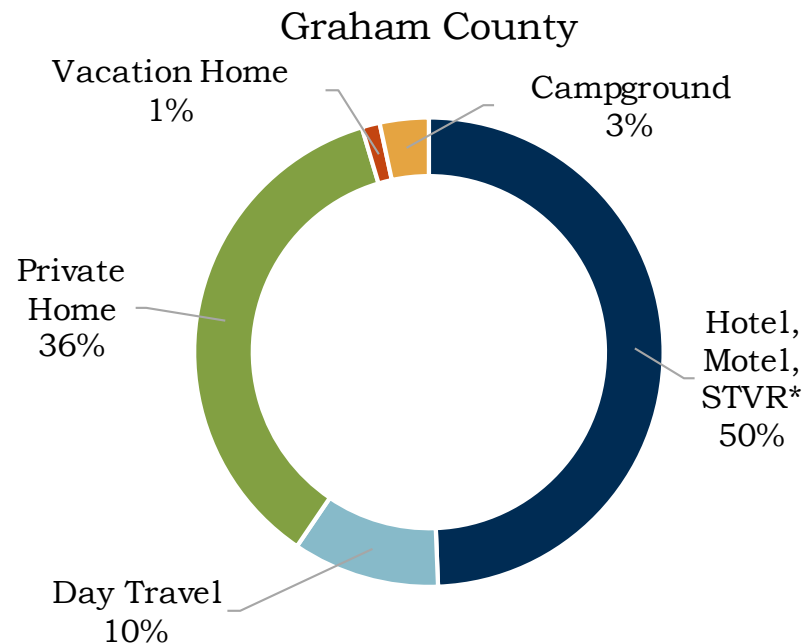
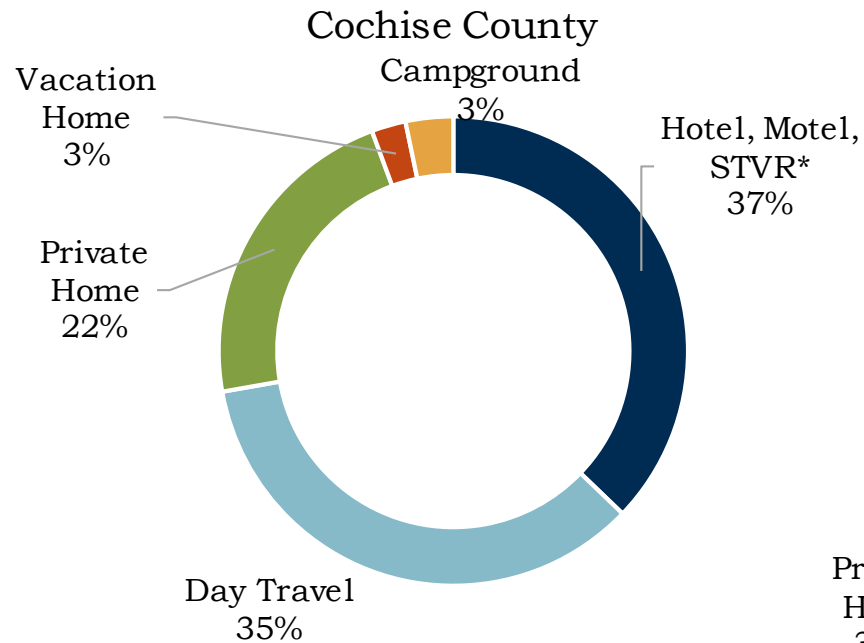
Santa Cruz County



Source: Dean Runyan Associates, 2018

# Spending by Type of Accommodation

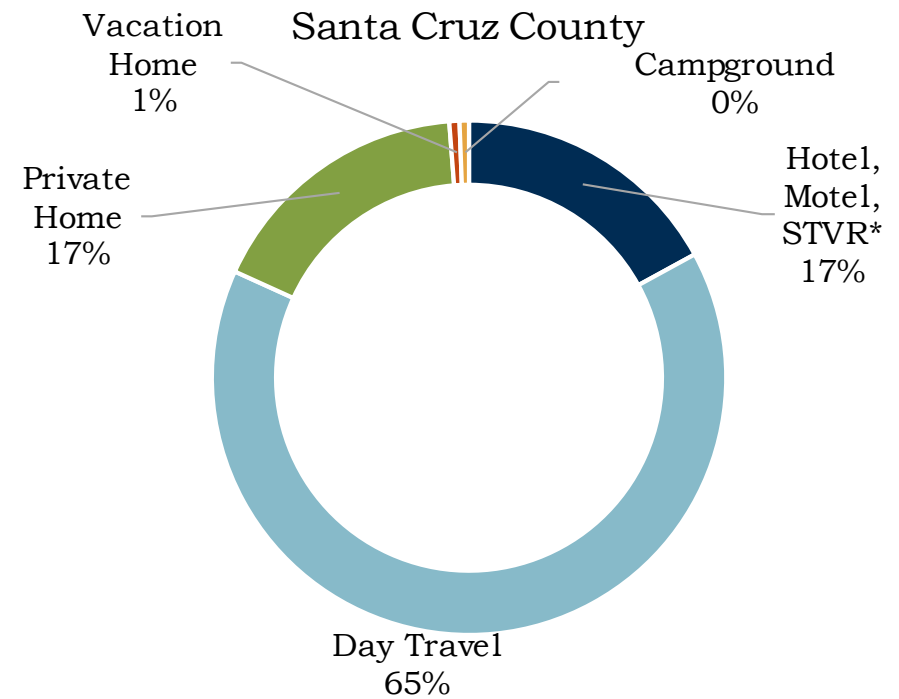
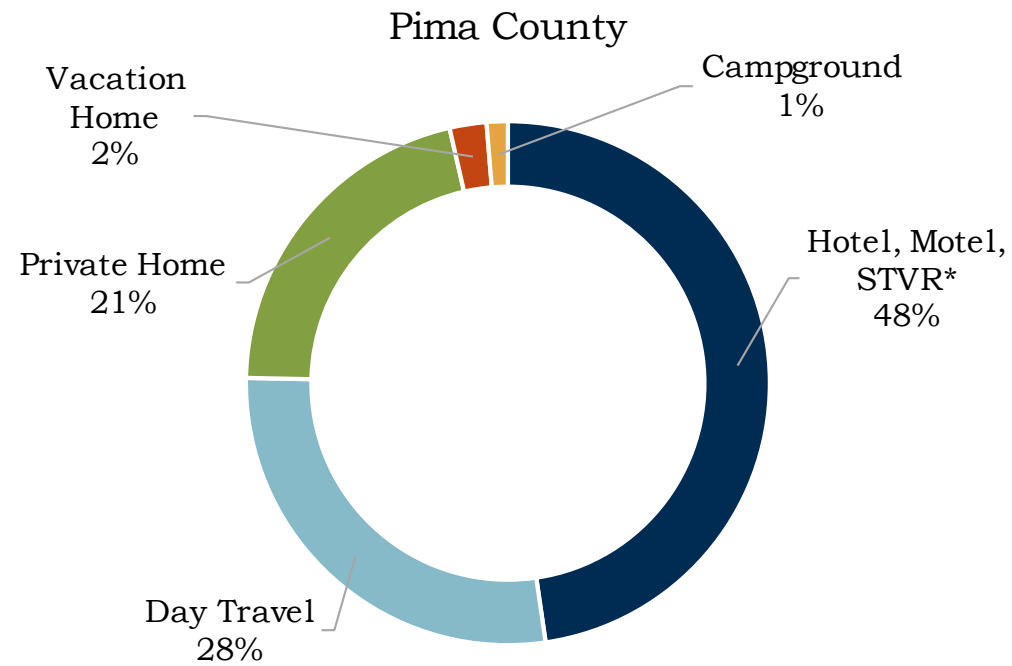
## Tucson & Southern Region



\*STVR = Short-term vacation rental

# Spending by Type of Accommodation

## Tucson & Southern Region





# 2019 Tourism Indicators To-Date

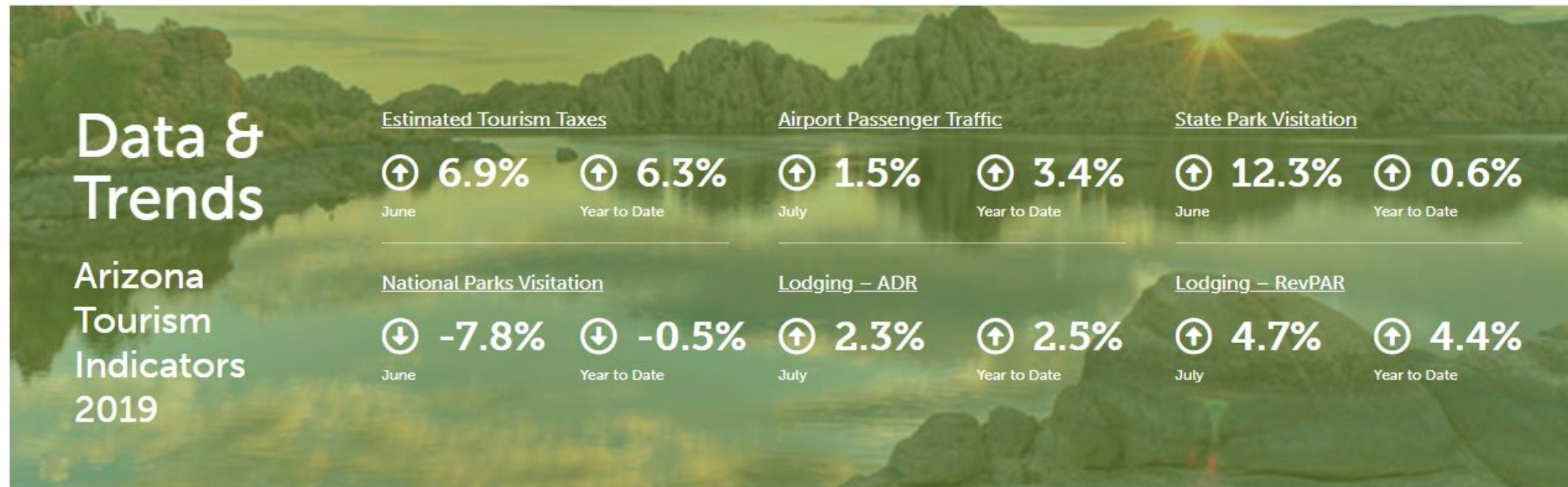
Tucson & Southern Region





# Tourism Indicators

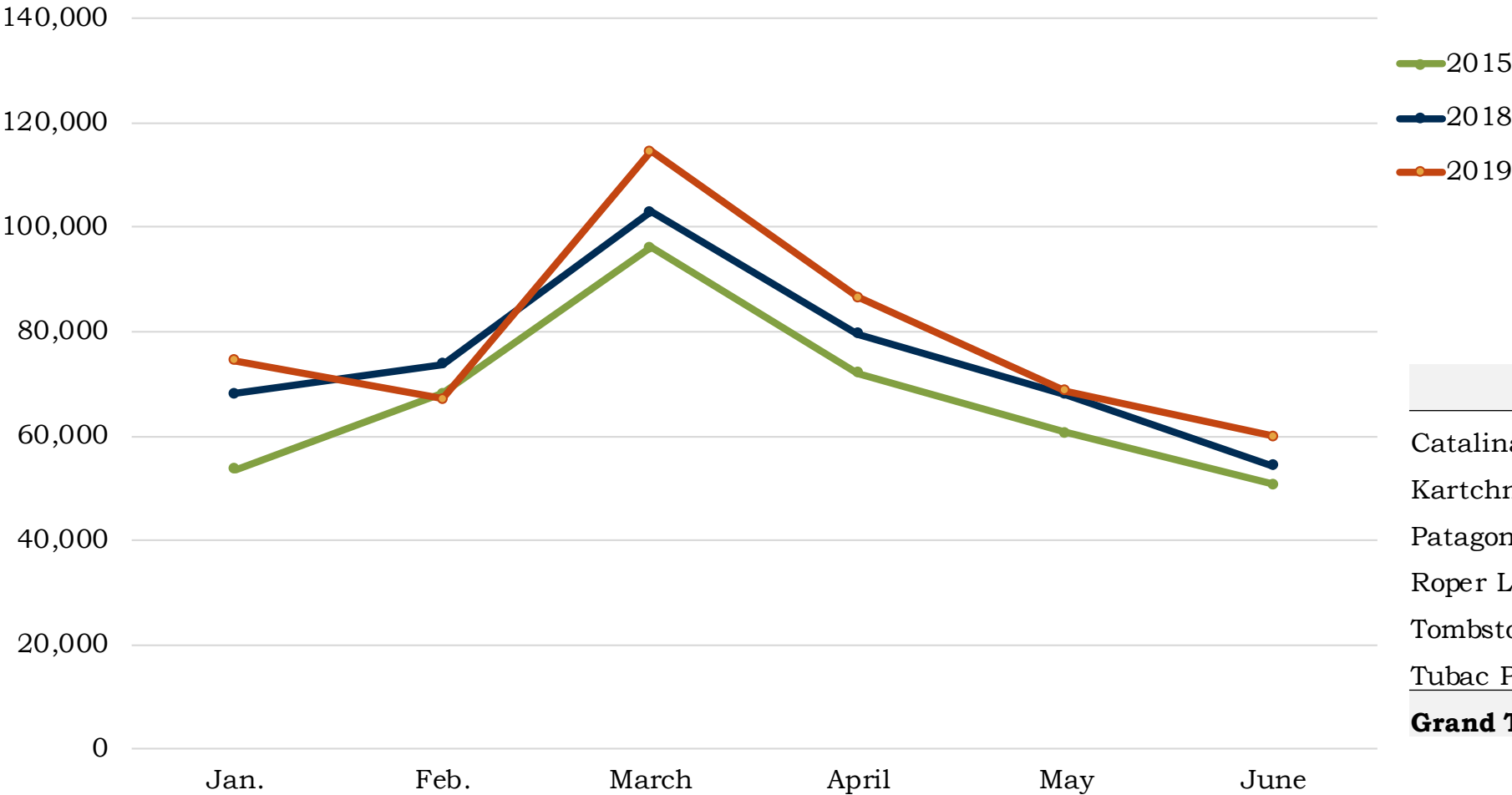
<http://tourism.az.gov/data-trends/>





# State Park Visitation

## Tucson & Southern Region



Jan.-June YTD Visitation

	2019 YTD
Catalina SP	159,150
Kartchner Caverns SP	109,379
Patagonia Lake SP	125,940
Roper Lake SP	43,971
Tombstone Courthouse SHP	27,789
Tubac Presidio SHP	5,049
Grand Total	471,278

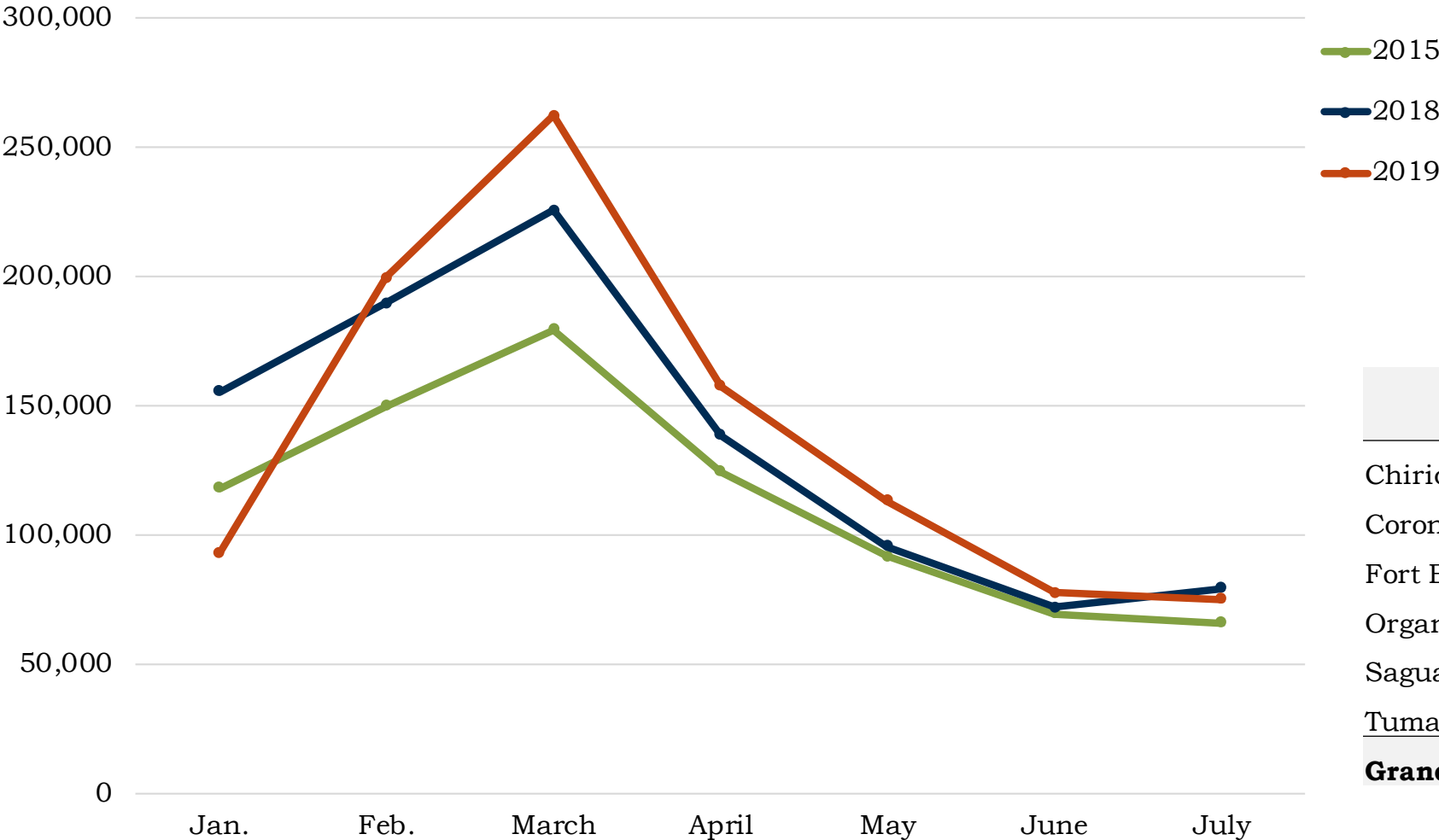
Source: Northern Arizona University, Arizona State Parks





# National Park Visitation

Tucson & Southern Region



## Jan.-July YTD Visitation

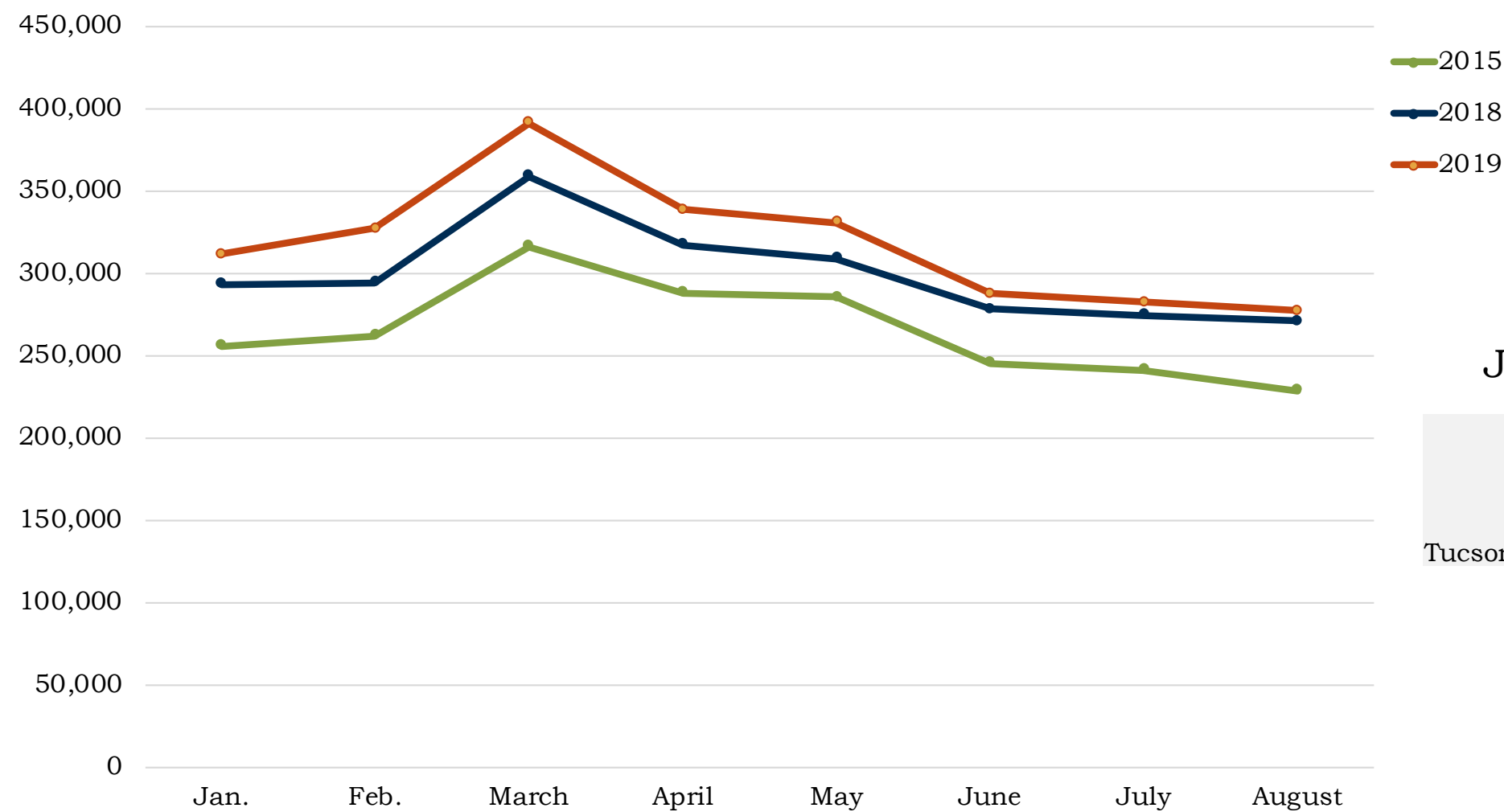
	2019 YTD
Chiricahua NM	41,195
Coronado NM	60,465
Fort Bowie NHS	5,026
Organ Pipe Cactus NM	174,631
Saguaro NP	675,419
Tumacacori NHP	22,725
Grand Total	979,461

Source: Northern Arizona University, National Park Service



# Airport Passenger Volume

Tucson & Southern Region



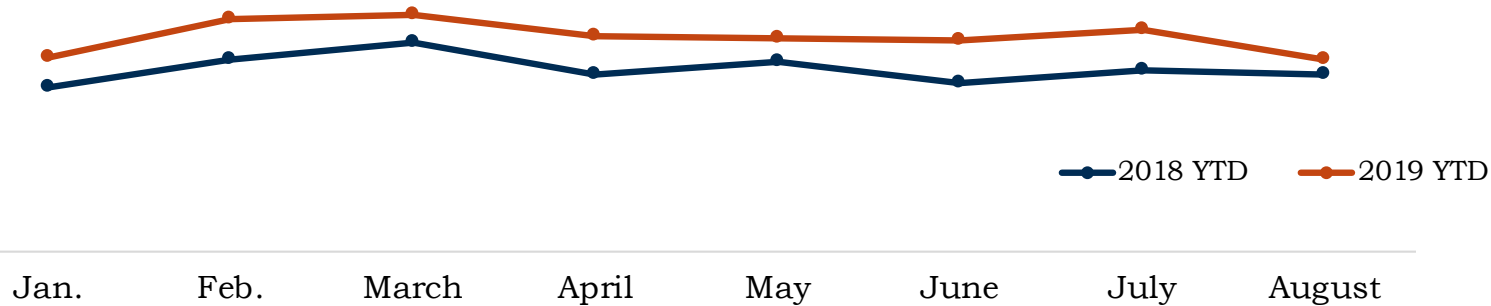
Jan.-August YTD Volume

	<b>2019 YTD</b>
Tucson - Domestic	2,269,399



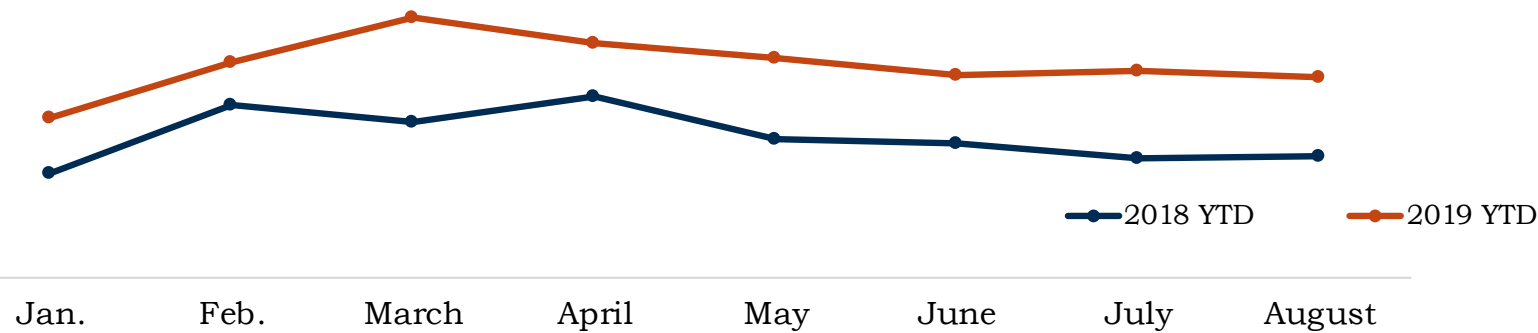
# Lodging Indicators

## Cochise County



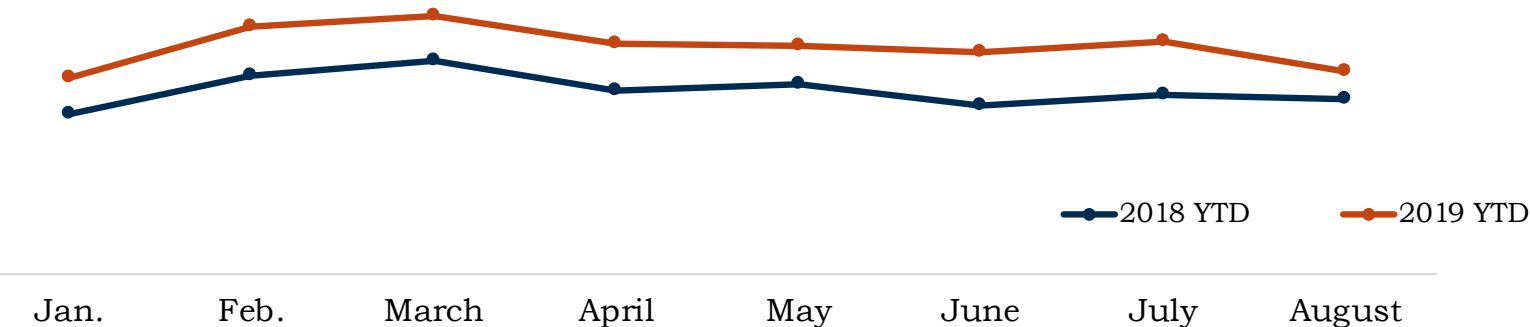
### Occupancy

YTD Change = 18%



### ADR

YTD Change = 5.2%



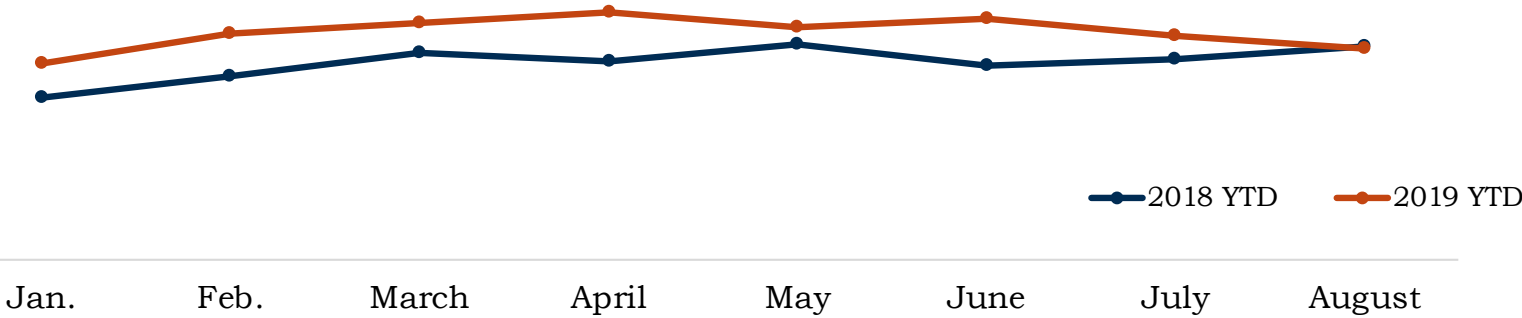
### RevPAR

YTD Change = 24.1%

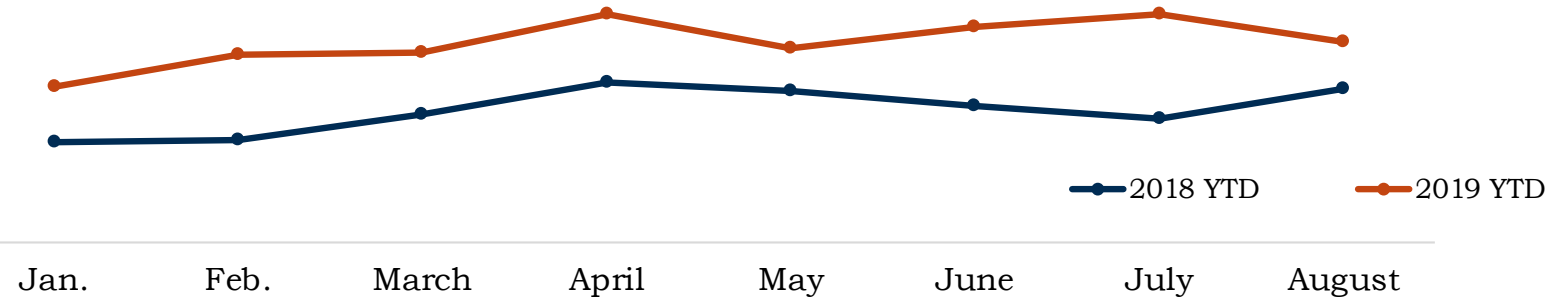


# Lodging Indicators

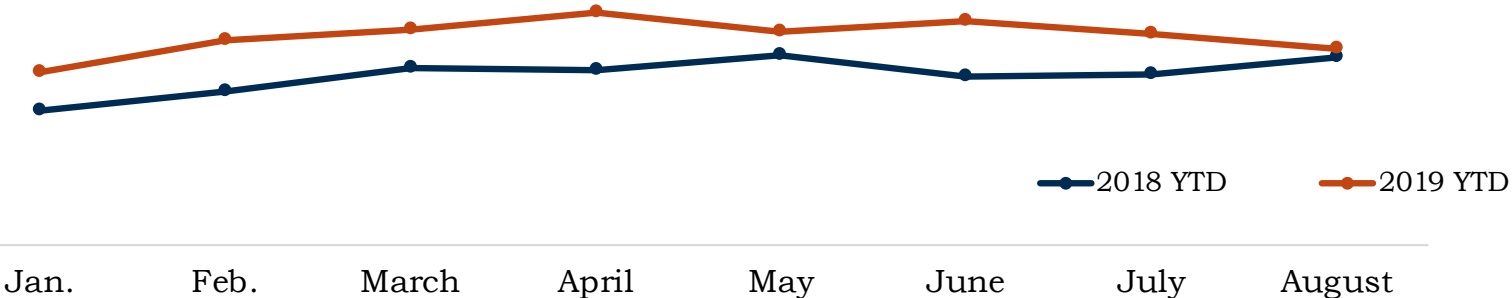
Graham County



**Occupancy**  
YTD Change = 15%



**ADR**  
YTD Change = 7%

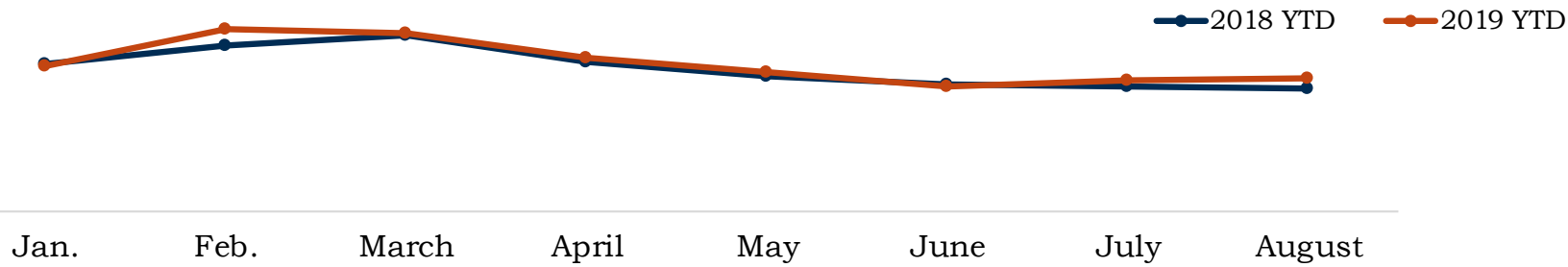


**RevPAR**  
YTD Change = 23.1%

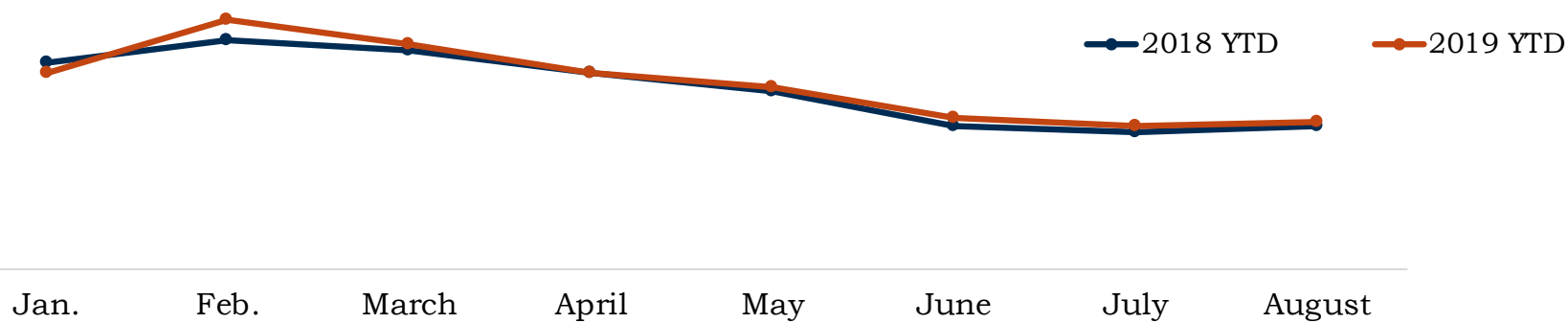


# Lodging Indicators

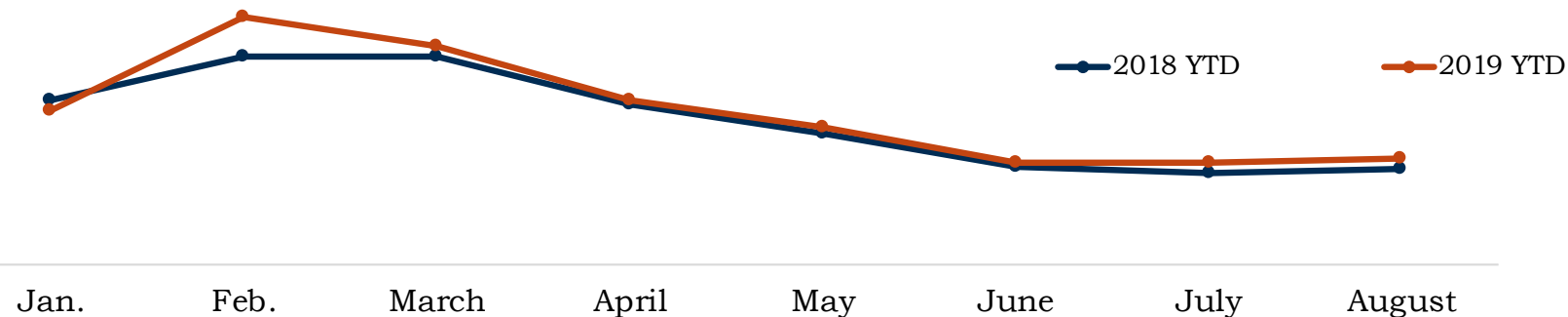
## Pima County



**Occupancy**  
YTD Change = 3.8%



**ADR**  
YTD Change = 3.0%

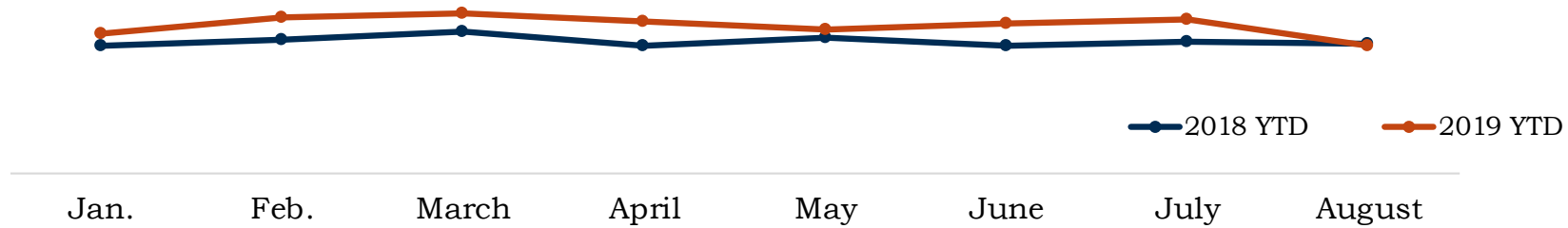


**RevPAR**  
YTD Change = 7.0%

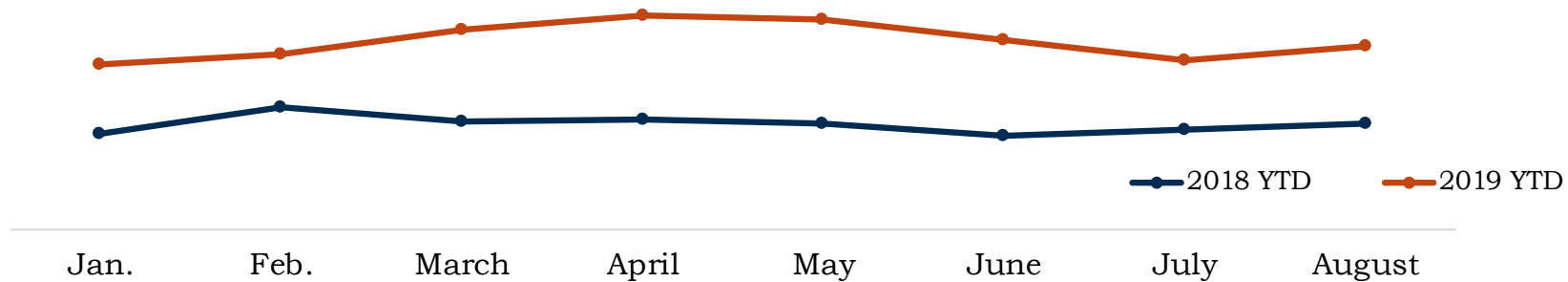


# Lodging Indicators

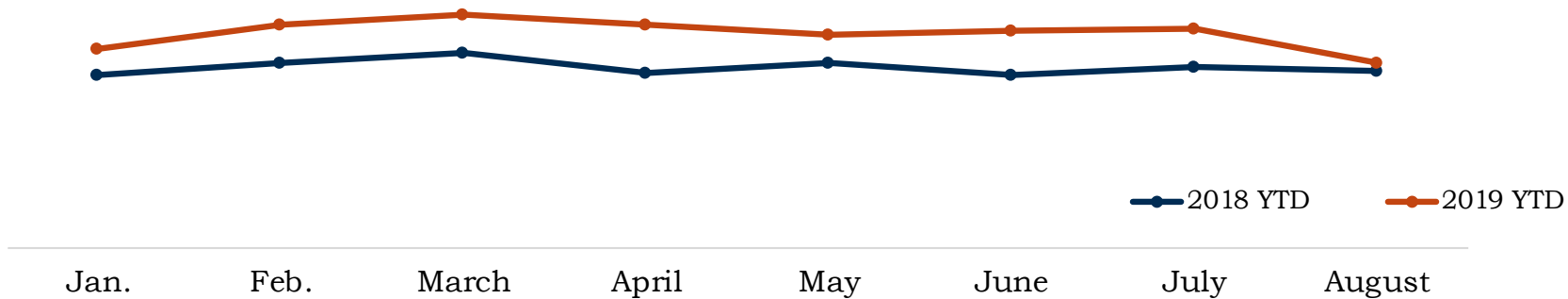
## Santa Cruz County



**Occupancy**  
YTD Change = 11.9%



**ADR**  
YTD Change = 6.1%



**RevPAR**  
YTD Change = 18.7%





# Gross Sales

<https://nau.edu/economic-policy-institute/data/>

## Monthly gross sales data



Monthly Gross Sales data is produced by the Arizona Department of Revenue; Hospitality-related sales in four categories are provided below: Hotel/Motel, Restaurant/Bar, Amusement and Retail. These sales are reported for the State overall and by County.

[Arizona Counties-Gross Sales by Sector 2019 vs 2018](#)

[Arizona Gross Sales: 2006-2018](#)

[Apache County: 2006-2018](#)

[Cochise County: 2006-2018](#)

[Coconino County: 2006-2018](#)

[Gila County: 2006-2018](#)

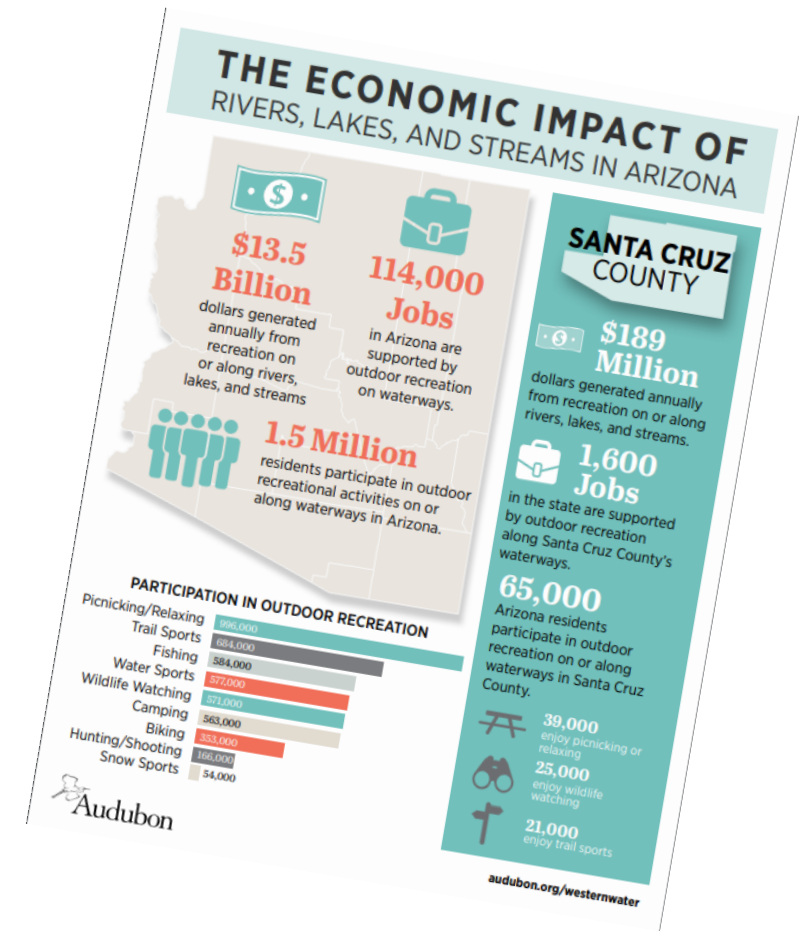
[Graham County: 2006-2018](#)

[Greenlee County: 2006-2018](#)

[La Paz County: 2006-2018](#)

# Additional Data Sources

- Arizona State Parks – visitor studies by park
- Audubon Arizona – [The Economic Impact of Arizona's Rivers, Lakes and Streams](#)





# Additional Data Sources

- National Park Service - [Economic Contributions of National Park Visitor Spending](#)

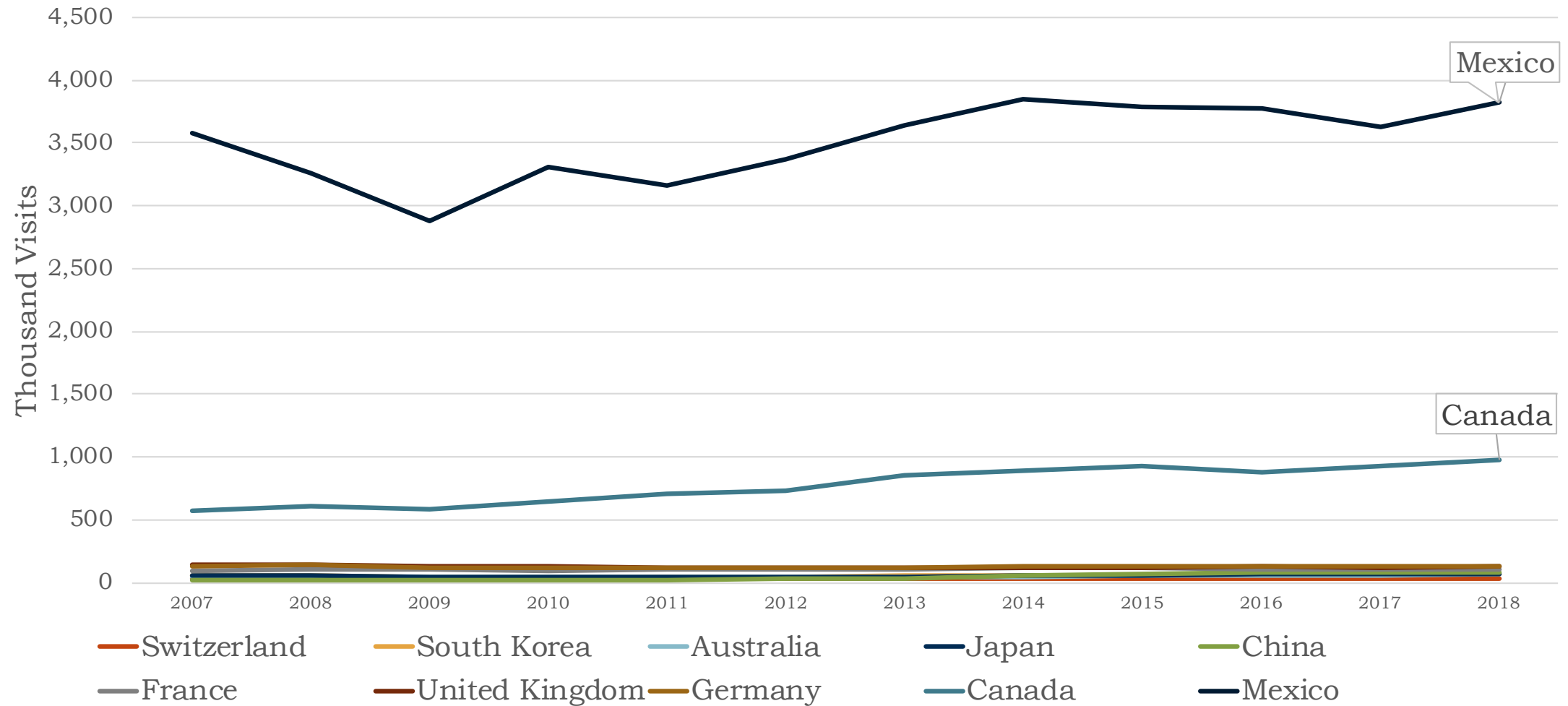
“In 2018, 957 thousand visitors spent an estimated \$62.1 million in local gateway regions while visiting Saguaro National Park.”



# International Visitation

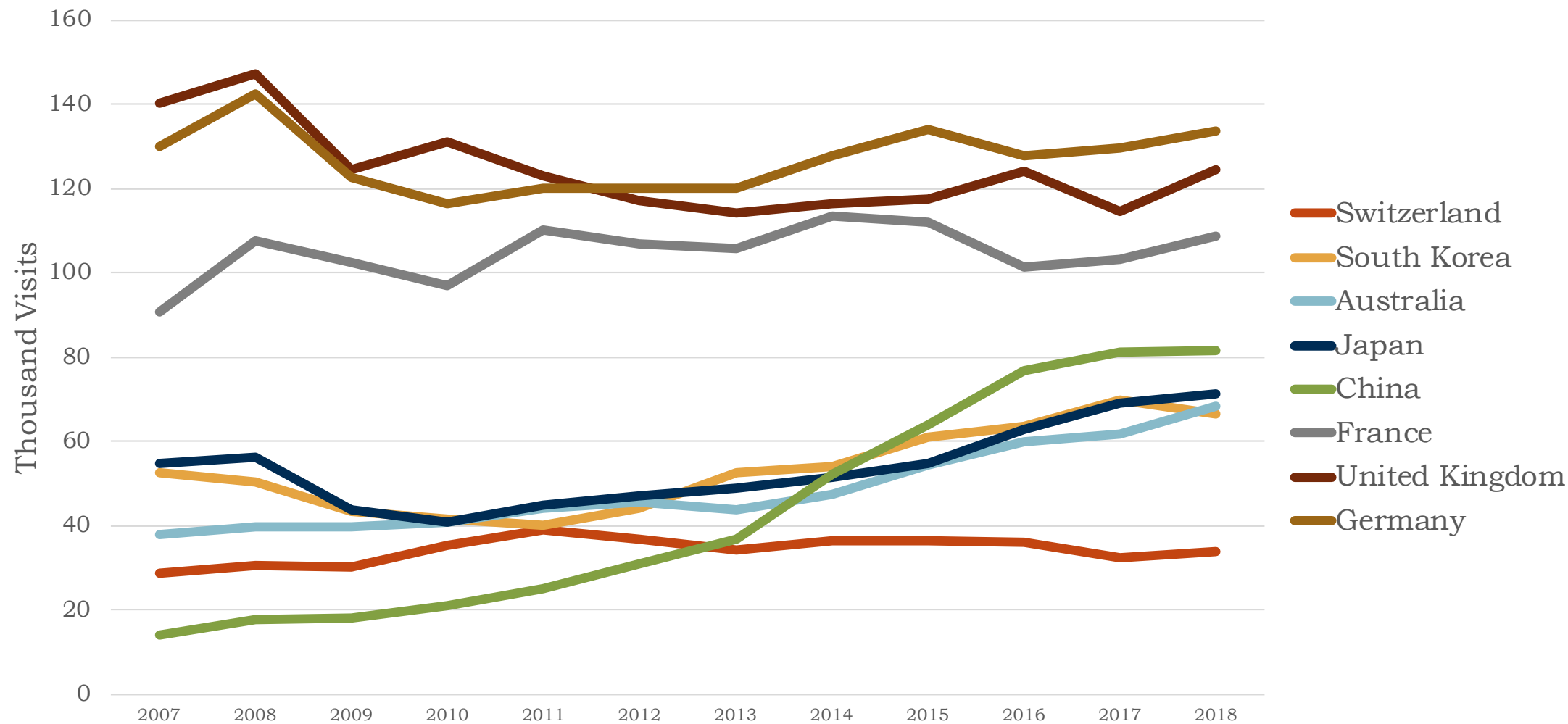


# Visitation to Arizona





# Visitation to Arizona Trend

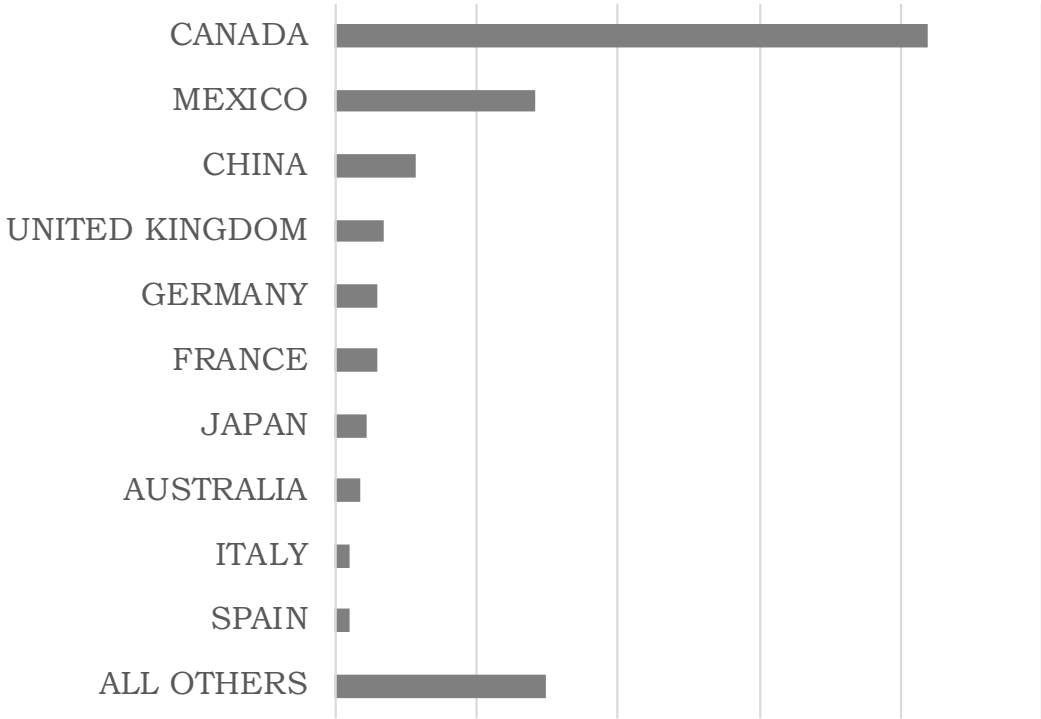




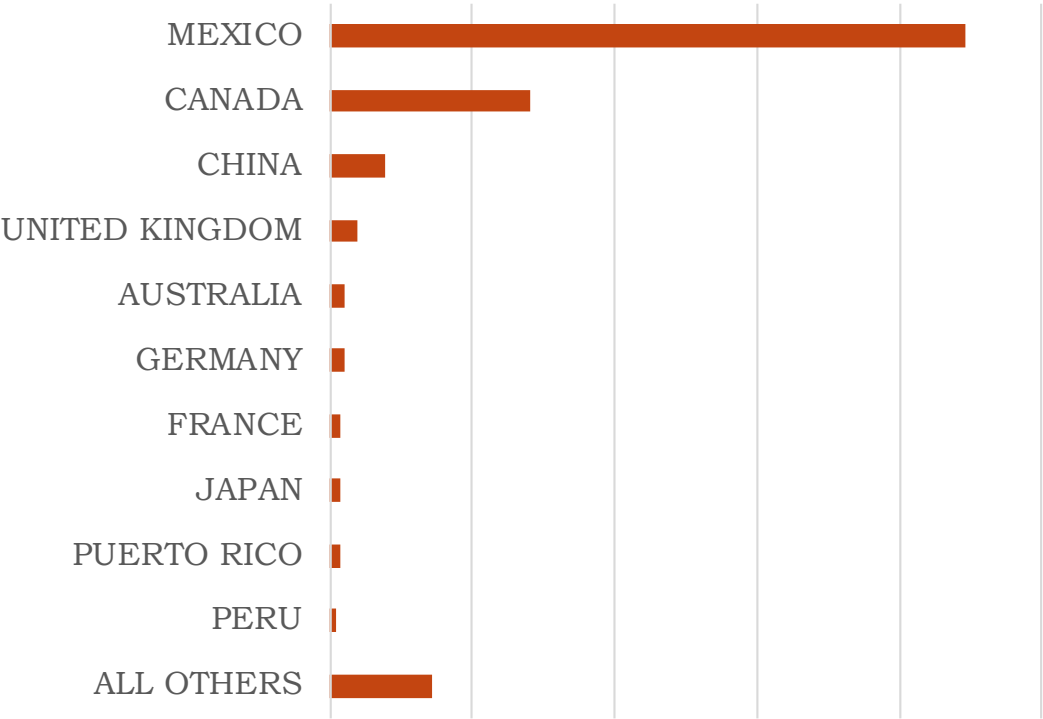


# Visa Card Spending Volume

## Arizona

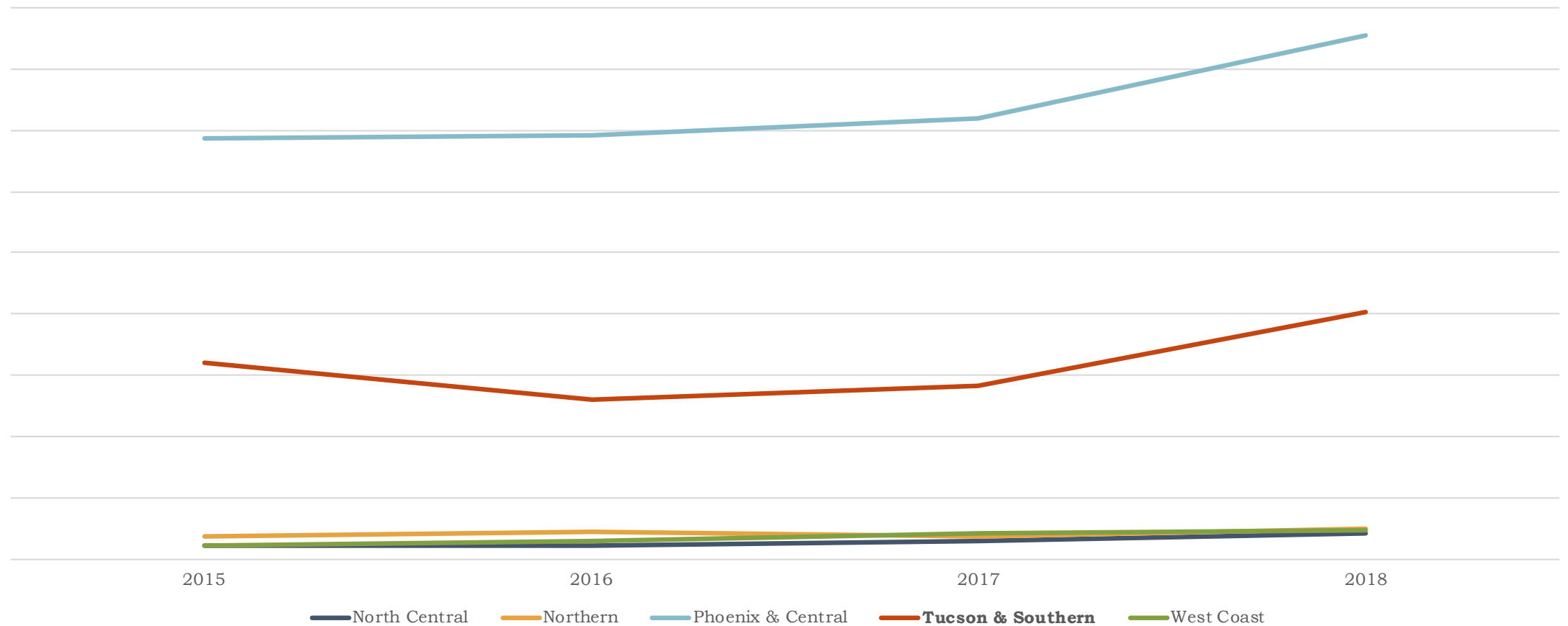


## Tucson & Southern Region



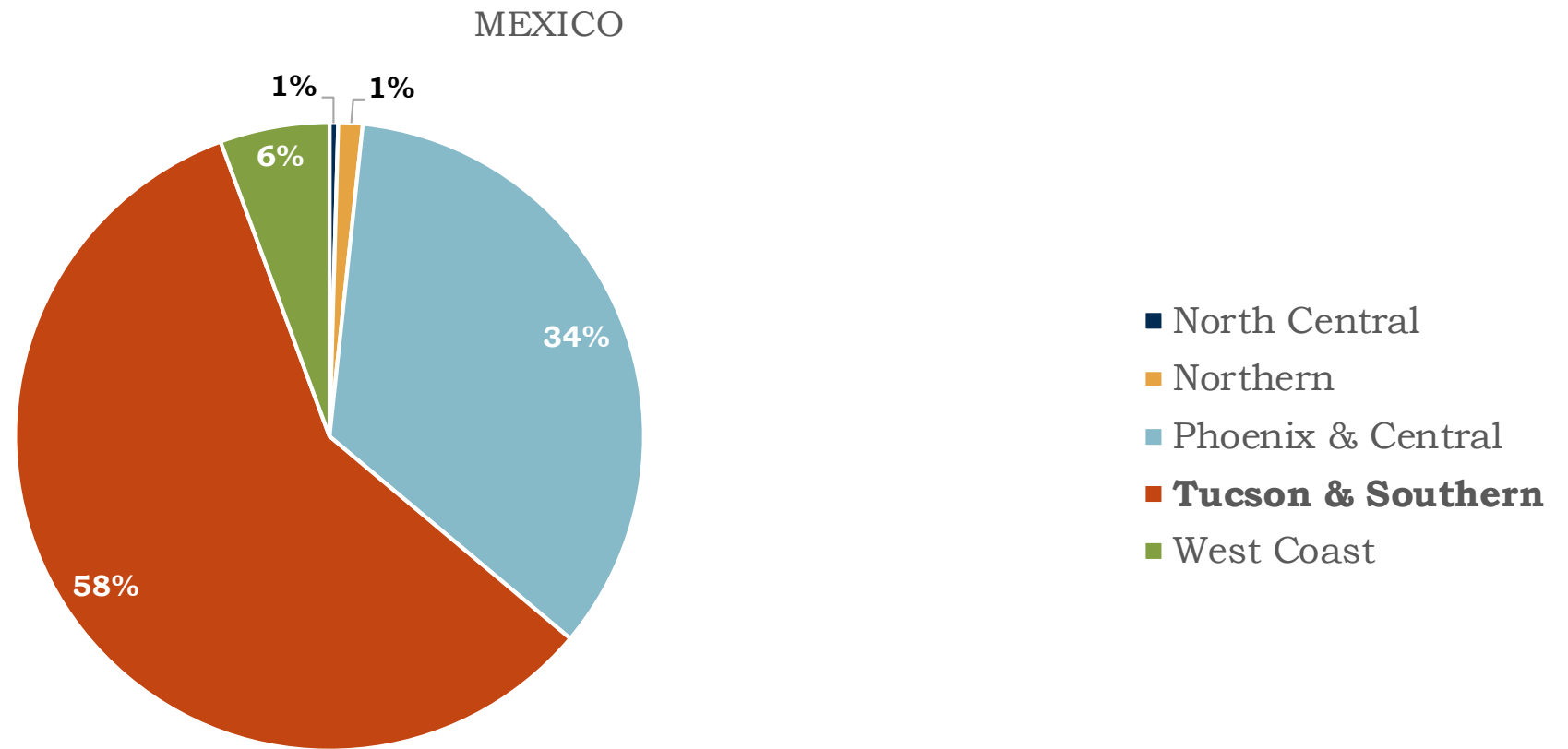
Source: VisaVue Travel, 2018

# Peruvian Spending by Region

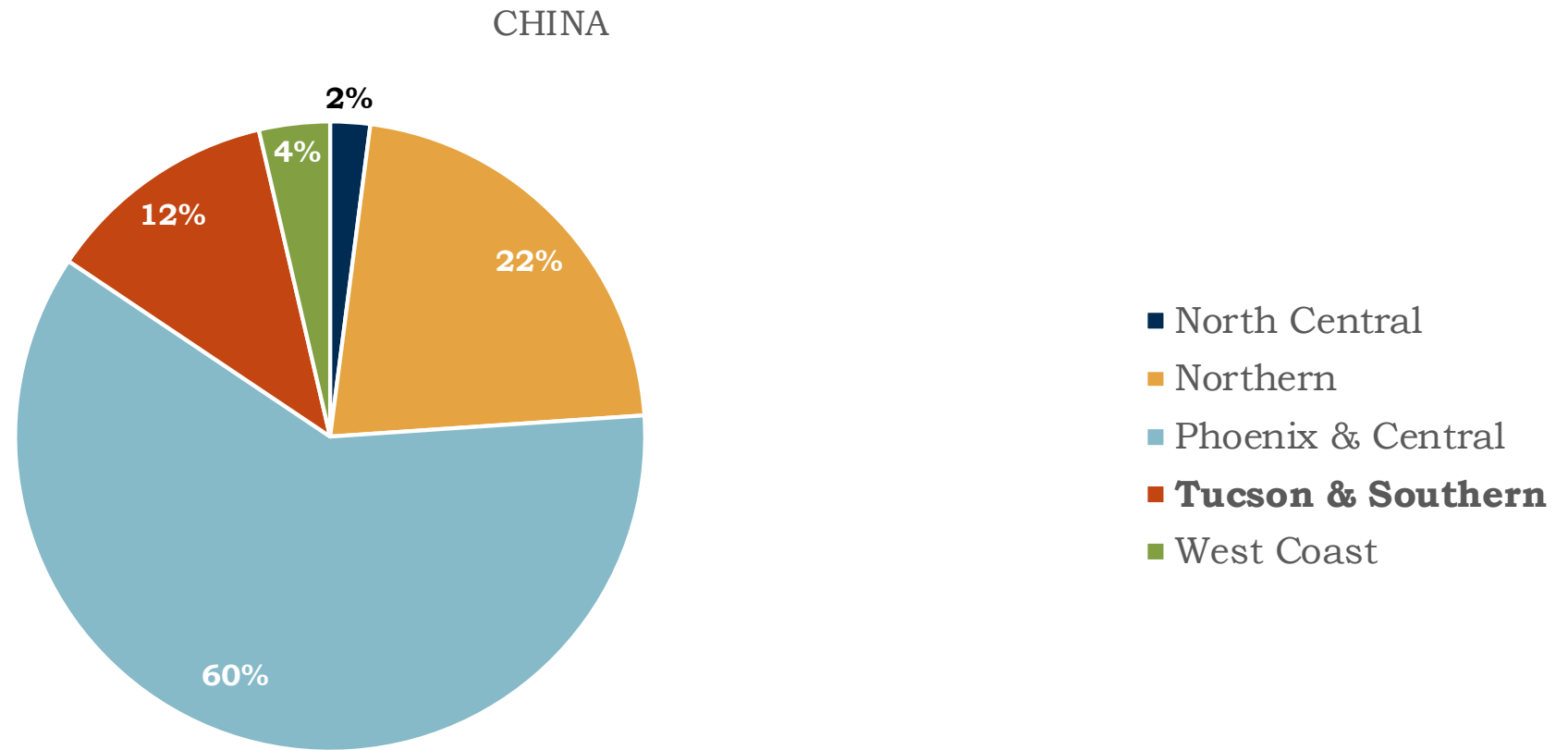


Source: VisaVue Travel, 2018

# Where do visitors spend the most?

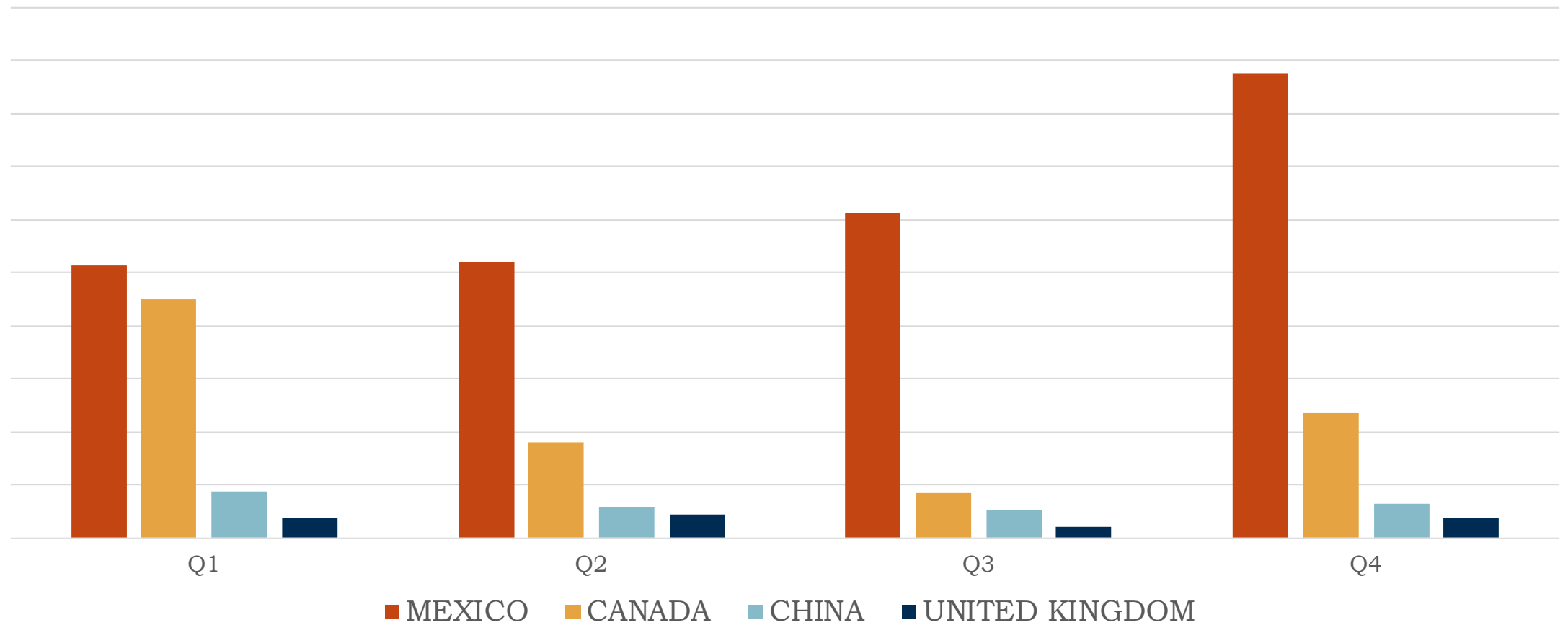


# Where do visitors spend the most?



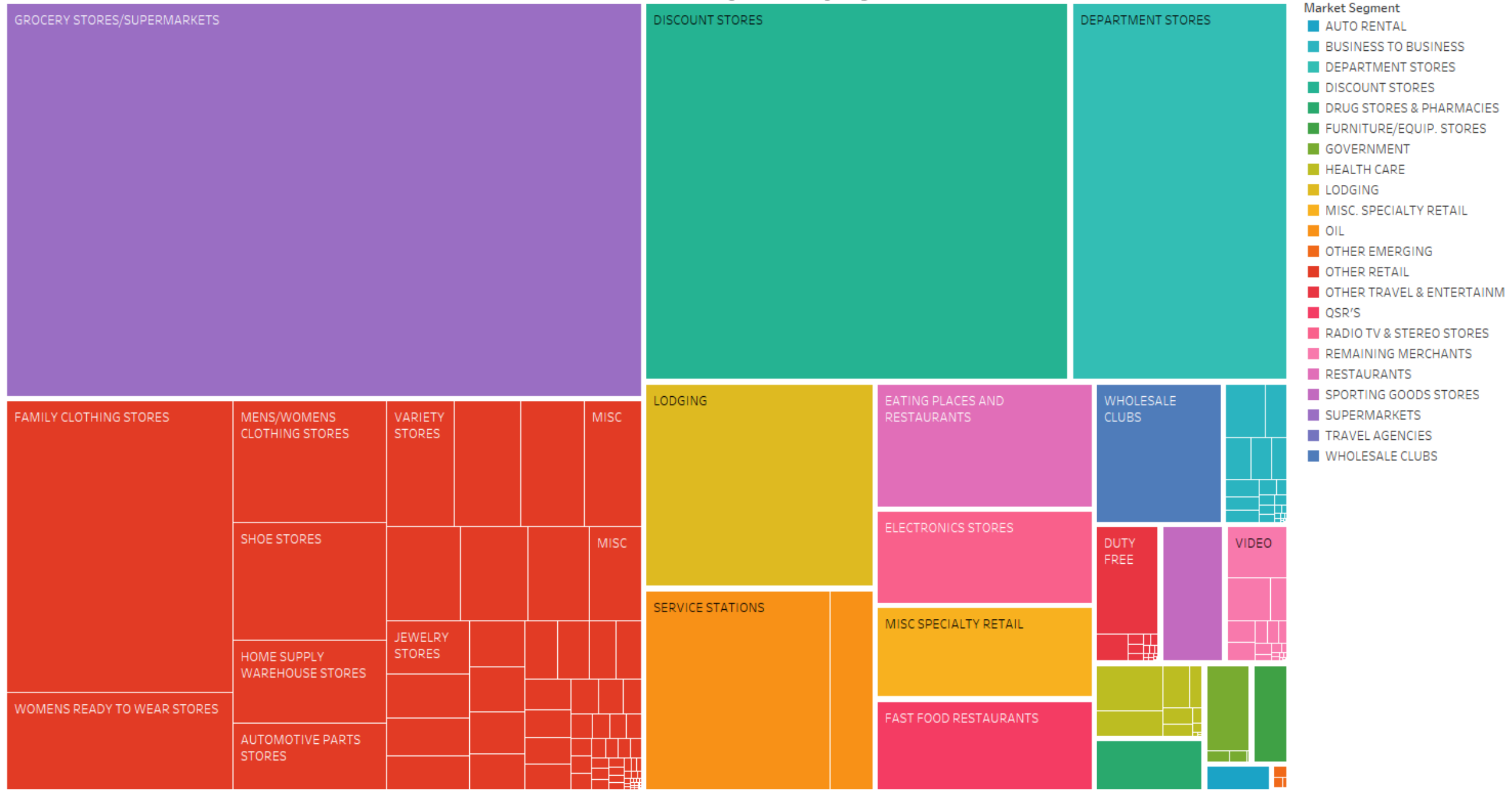


# Seasonal Spending





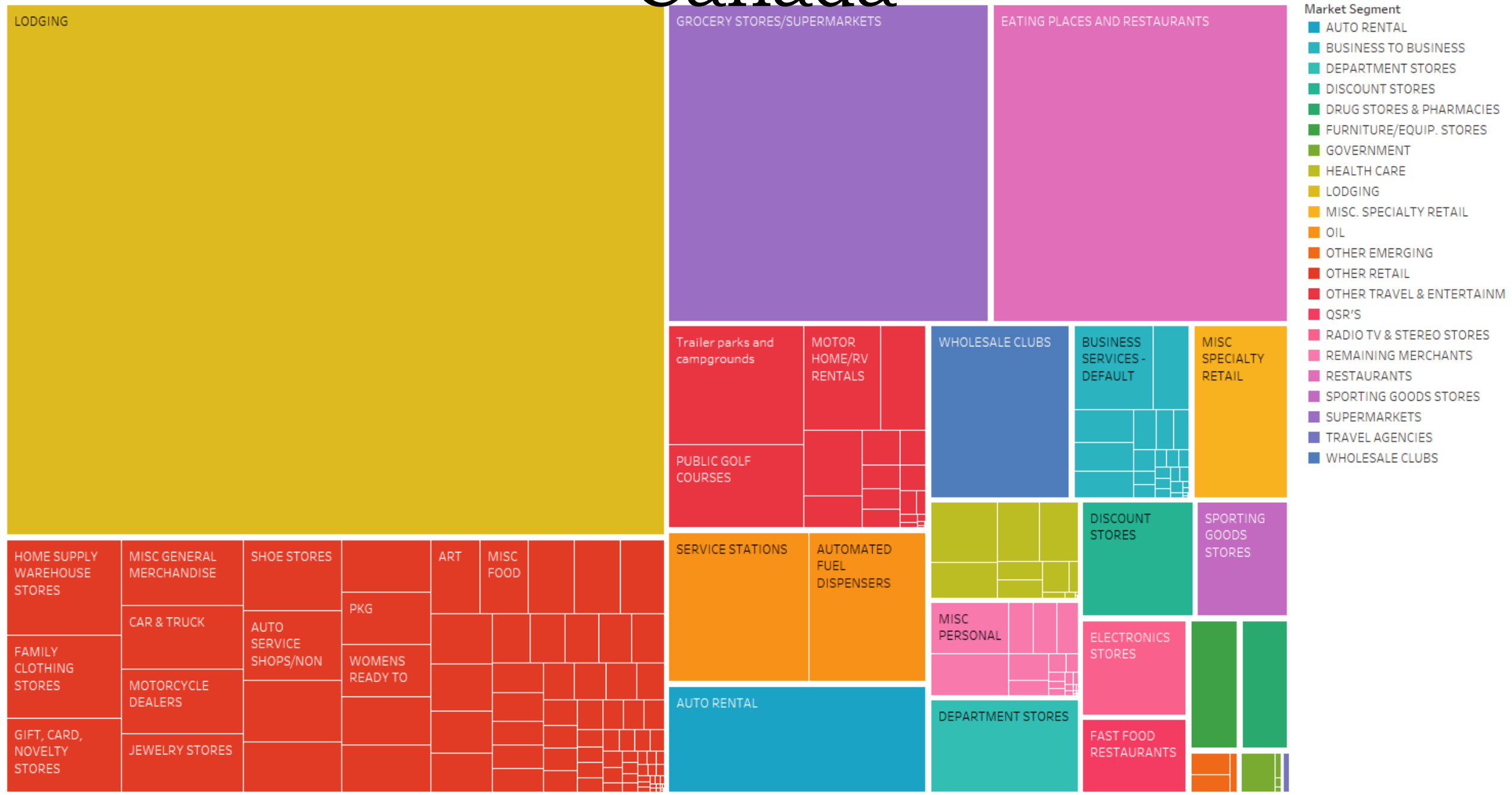
# Mexico





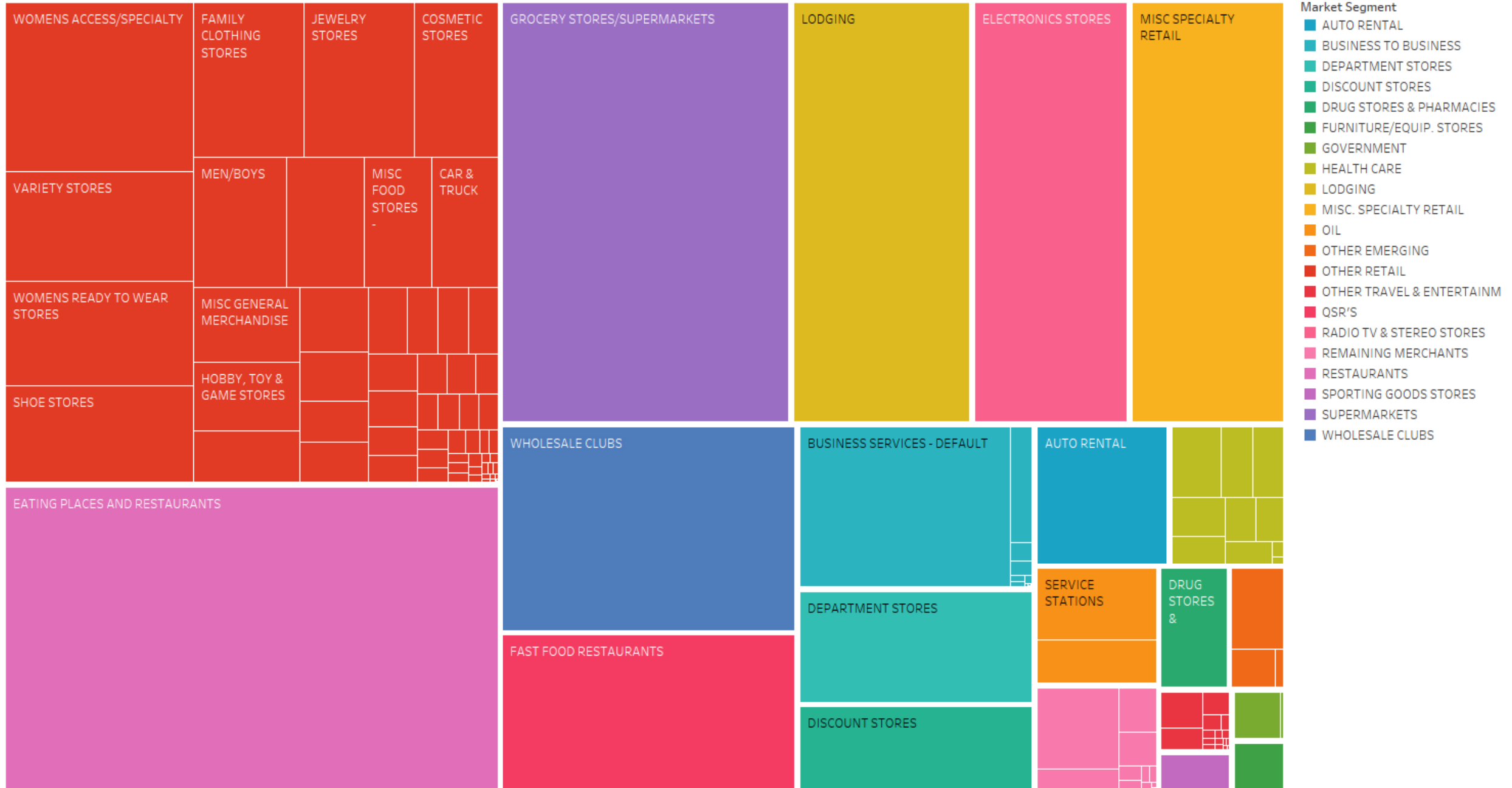


# Canada



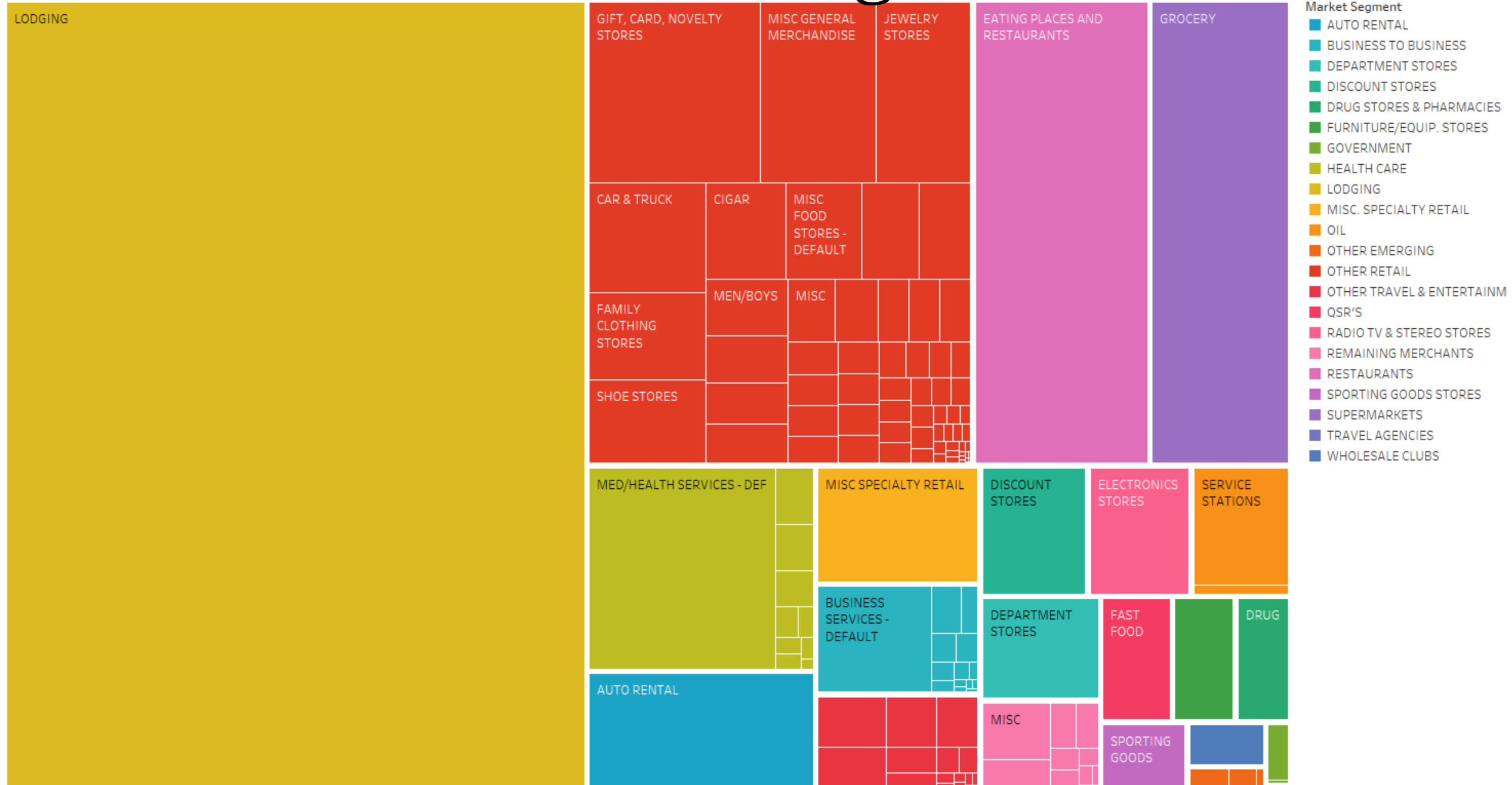


# China



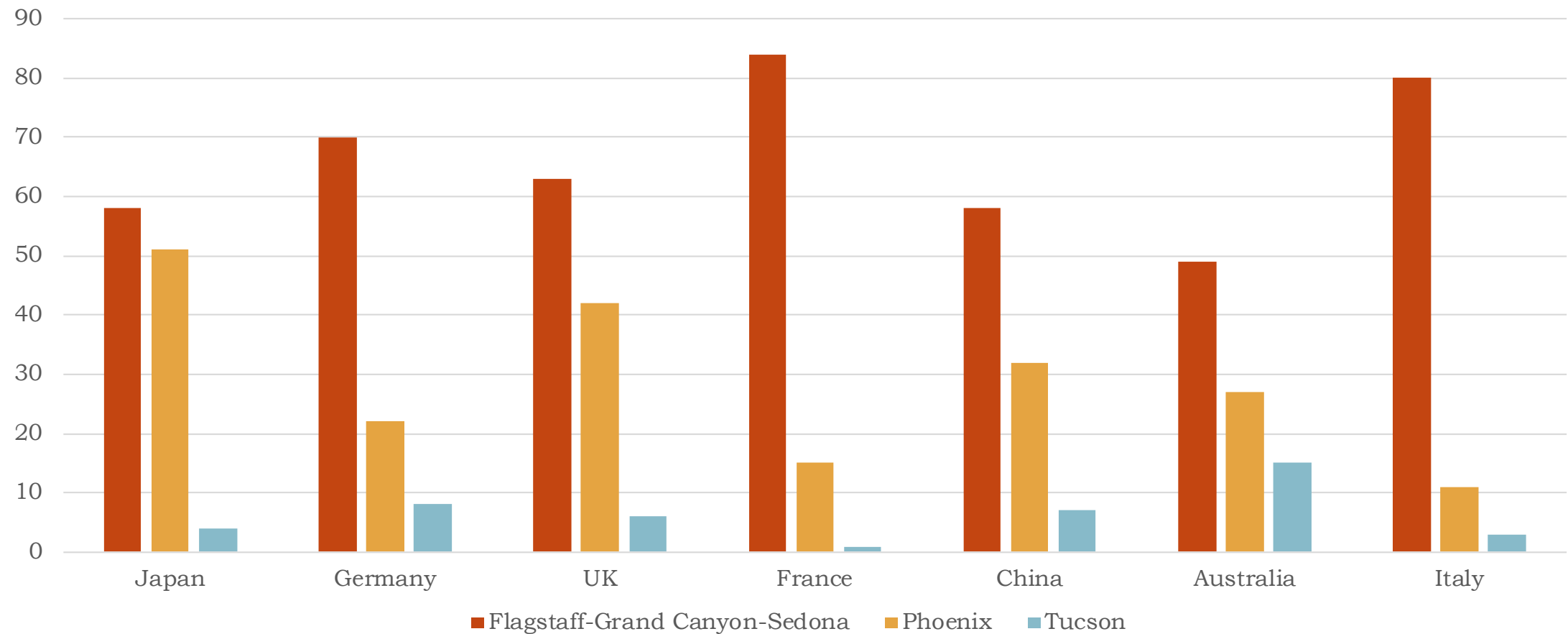


# United Kingdom





# Overseas Visitation – AZ Destinations

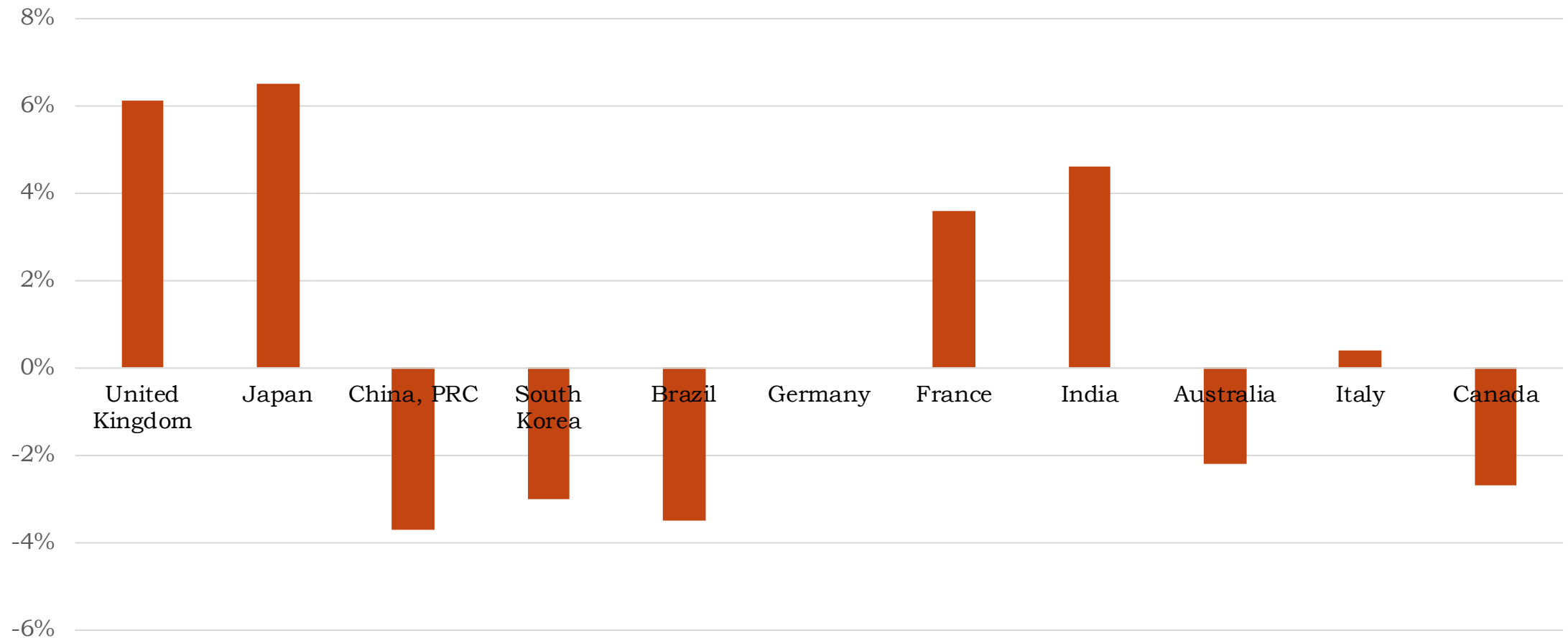


Source: *Survey of International Air Travelers 2018*, NTTO

# 2019 International Visitor Trends

# Arrivals to the U.S.

## % Change YTD July 2019\*

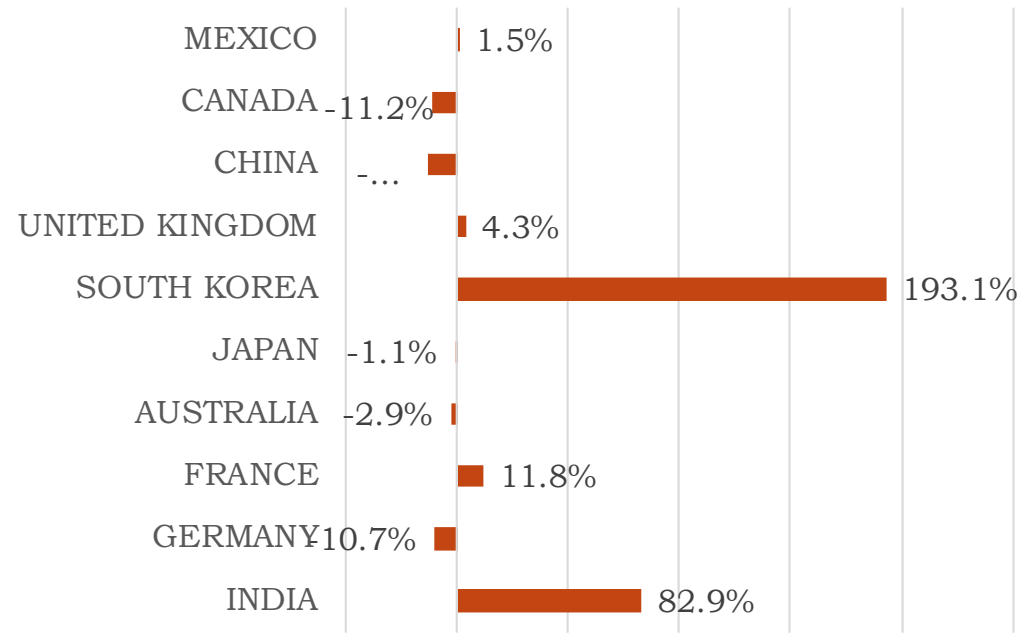


Source: National Travel and Tourism Office \*Canada arrivals are YTD June 2019

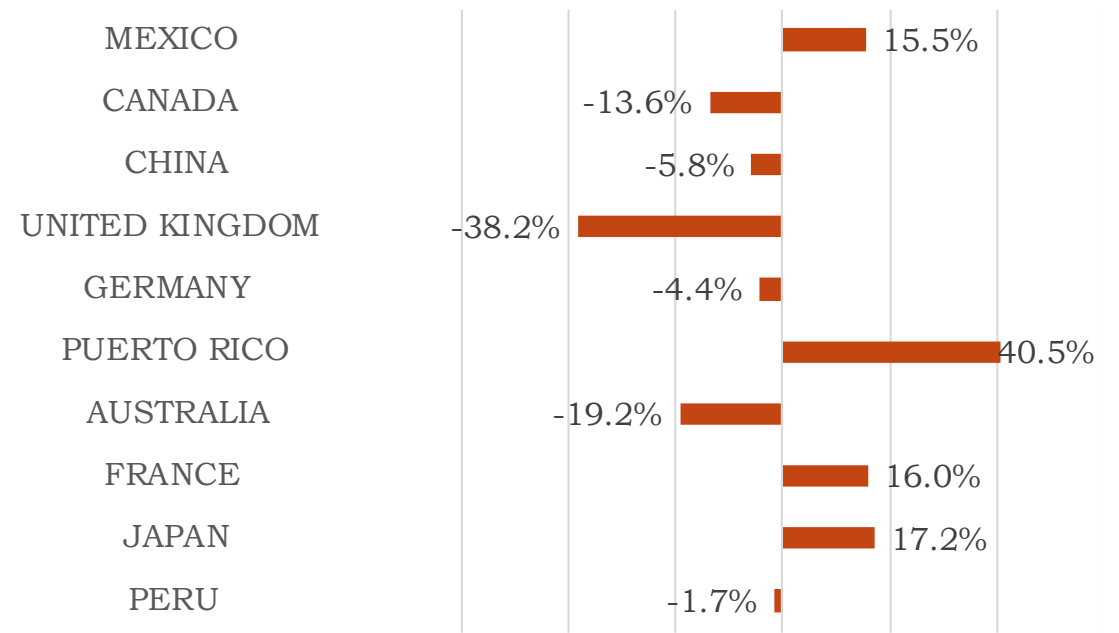
# International Visa Card Spending

Tucson & Southern Region

## Q1 2019 (January-March)



## Q2 2019 (April-June)



# Domestic Overnight Visitor Expenditures 2018

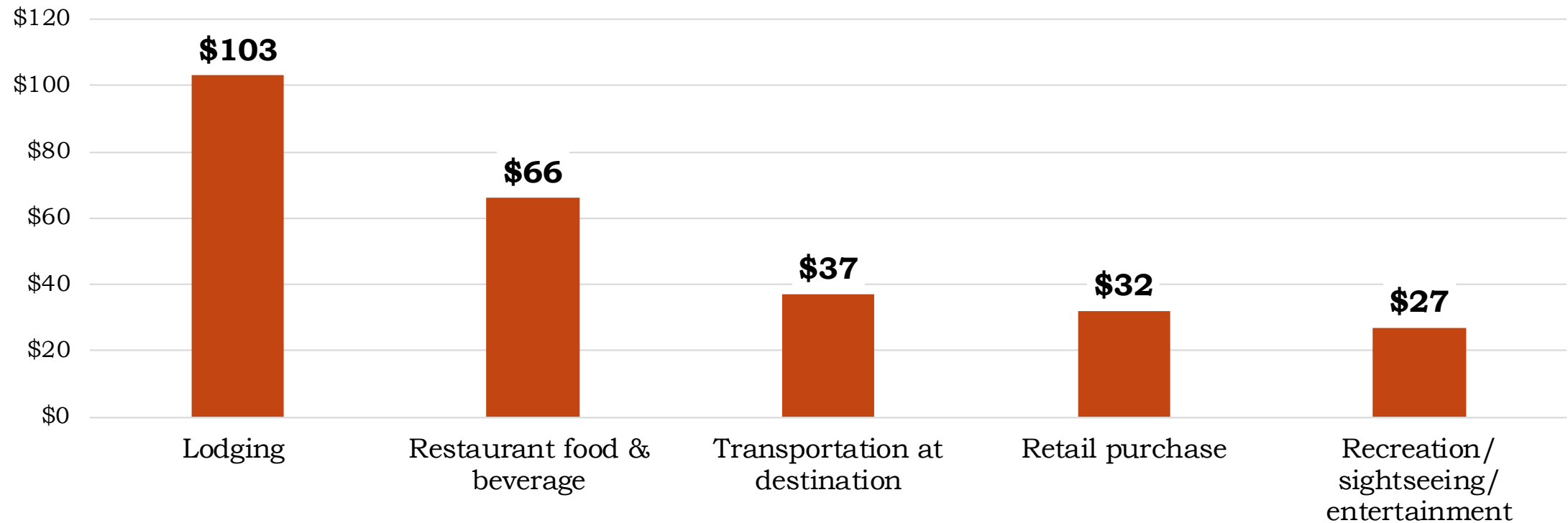
Tucson & Southern Region





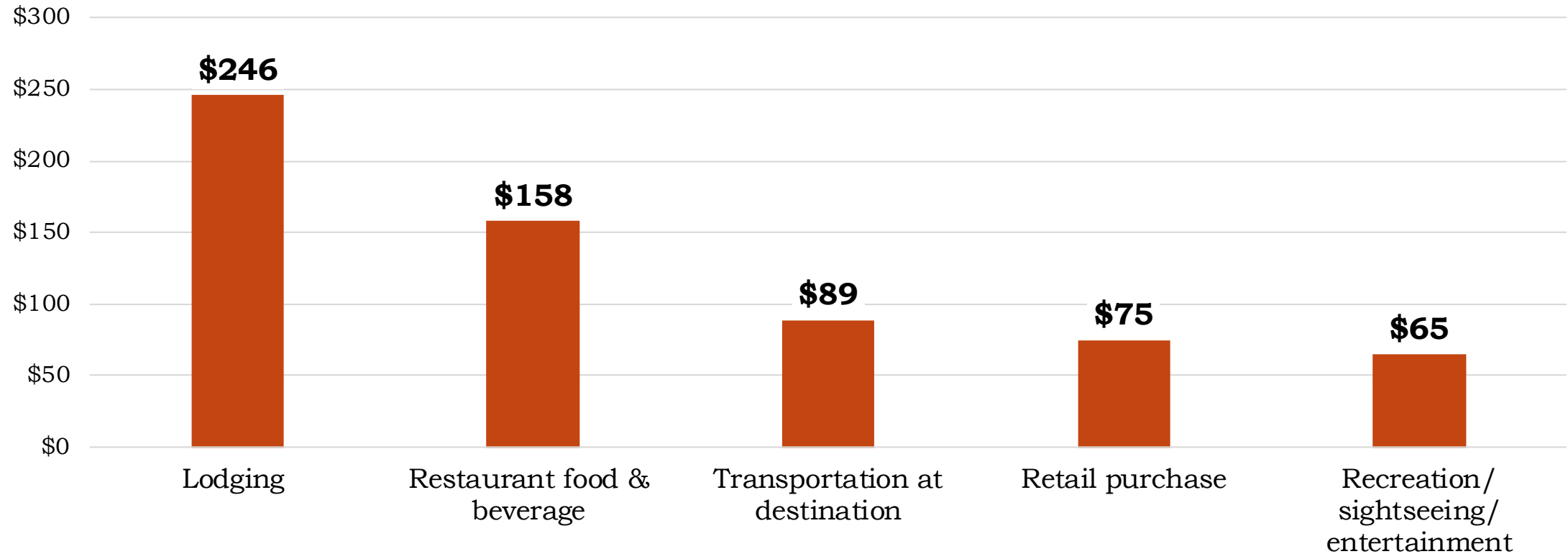
# Average Per-Person Expenditures on Domestic Overnight Trips

**Average Per Person \$265**



# Average Per-Party Expenditures on Domestic Overnight Trips

**Average Per Party \$633**



# Domestic Overnight Visitor Profile 2018

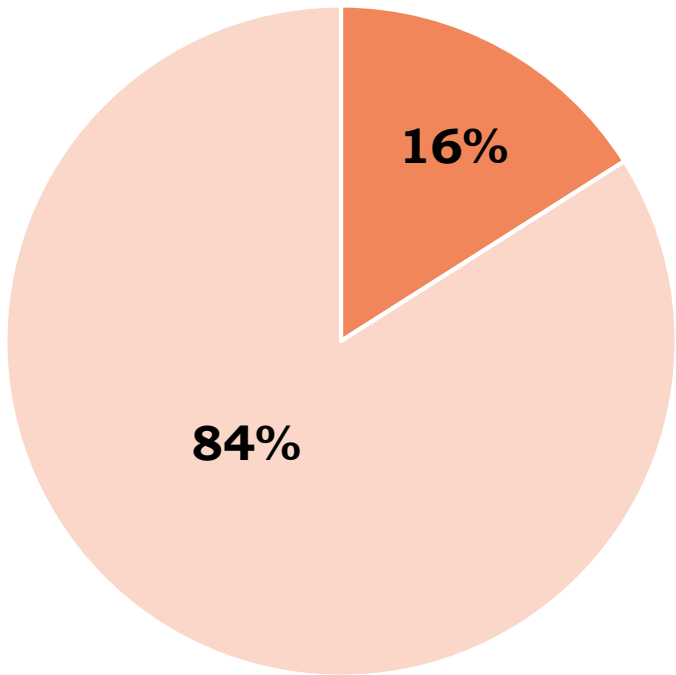
Tucson & Southern Region



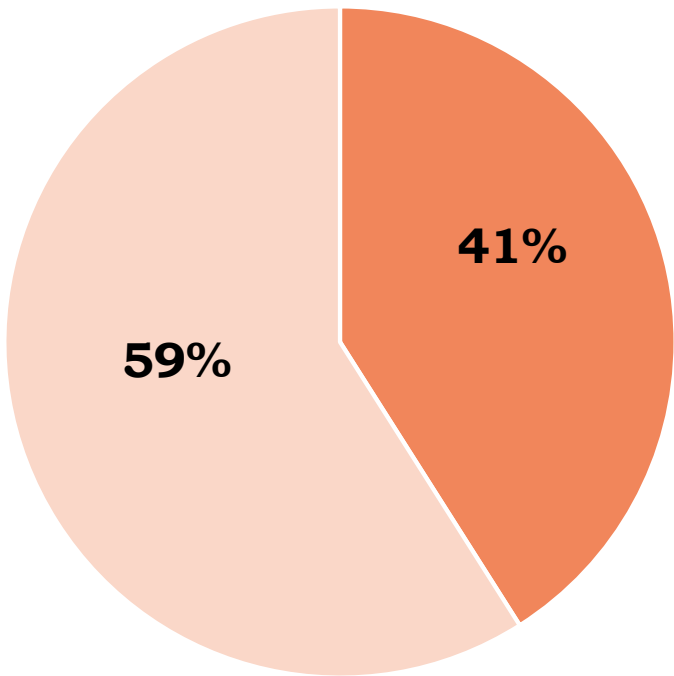


# 2018 Regional Domestic Visitor Profile

Tucson & Southern Region



■ Business ■ Leisure

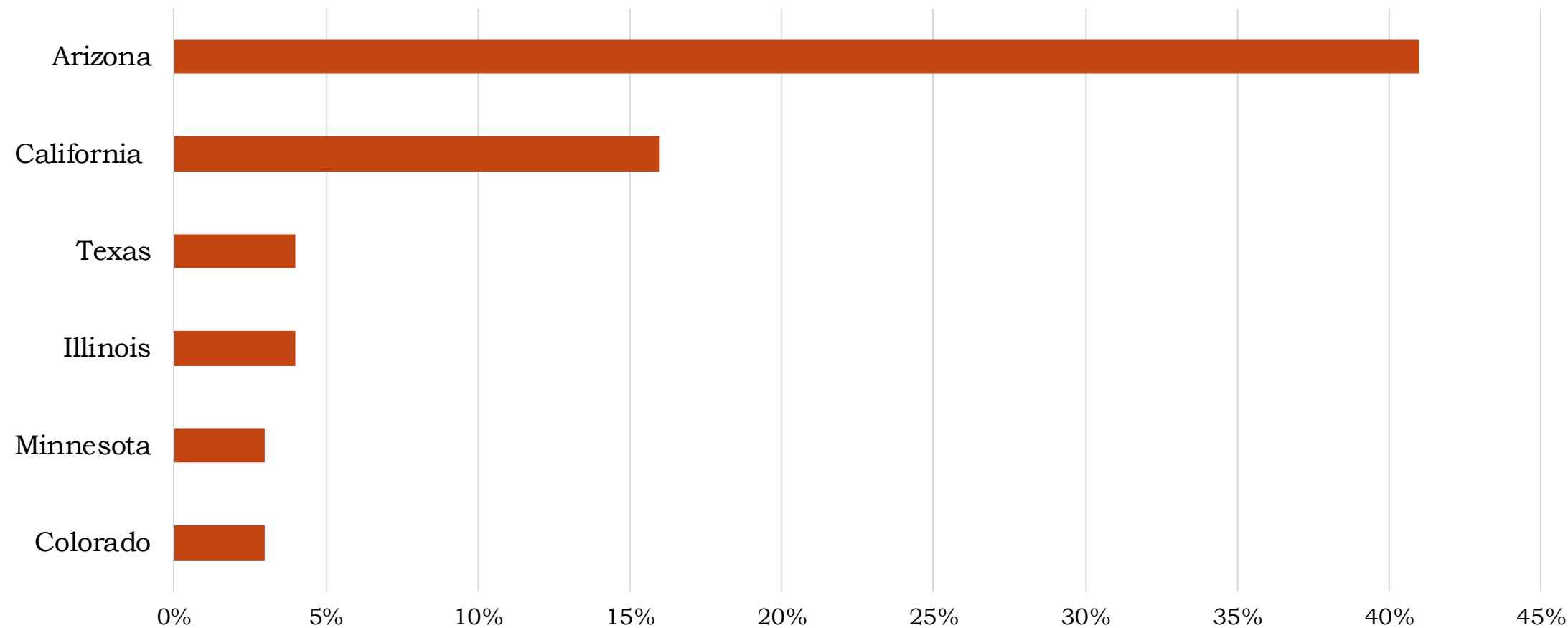


■ AZ Residents ■ Non-Residents



# State Origin of Overnight Trips

Tucson & Southern Region

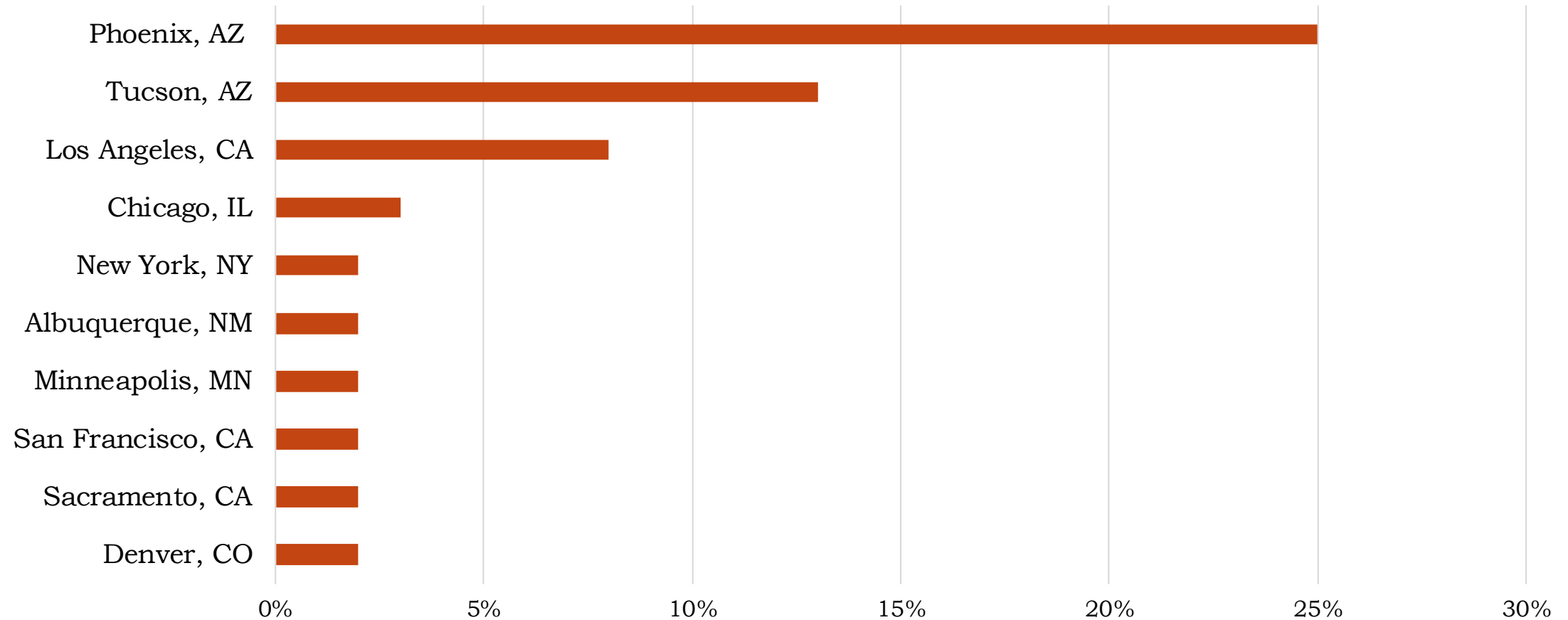


Source: Longwoods International



# DMA Origin of Overnight Trip

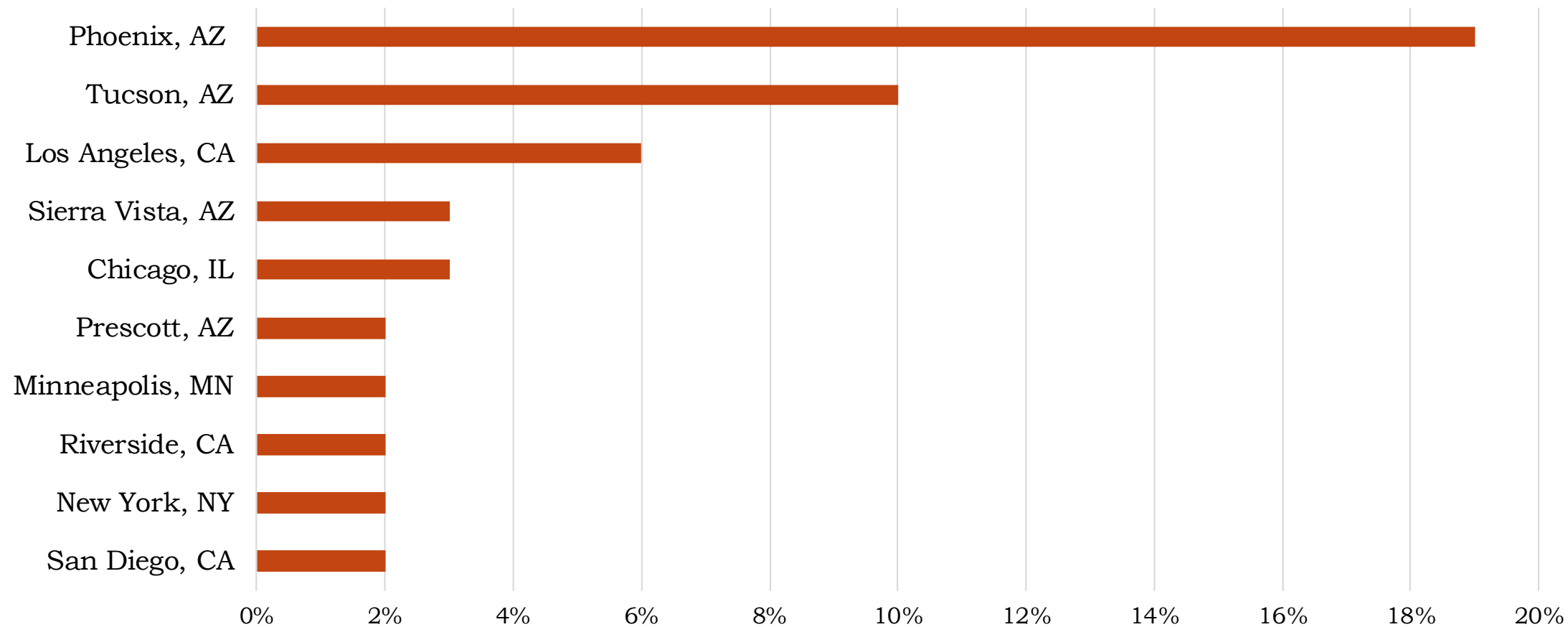
Tucson & Southern Region





# MSA Origin of Overnight Trip

Tucson & Southern Region

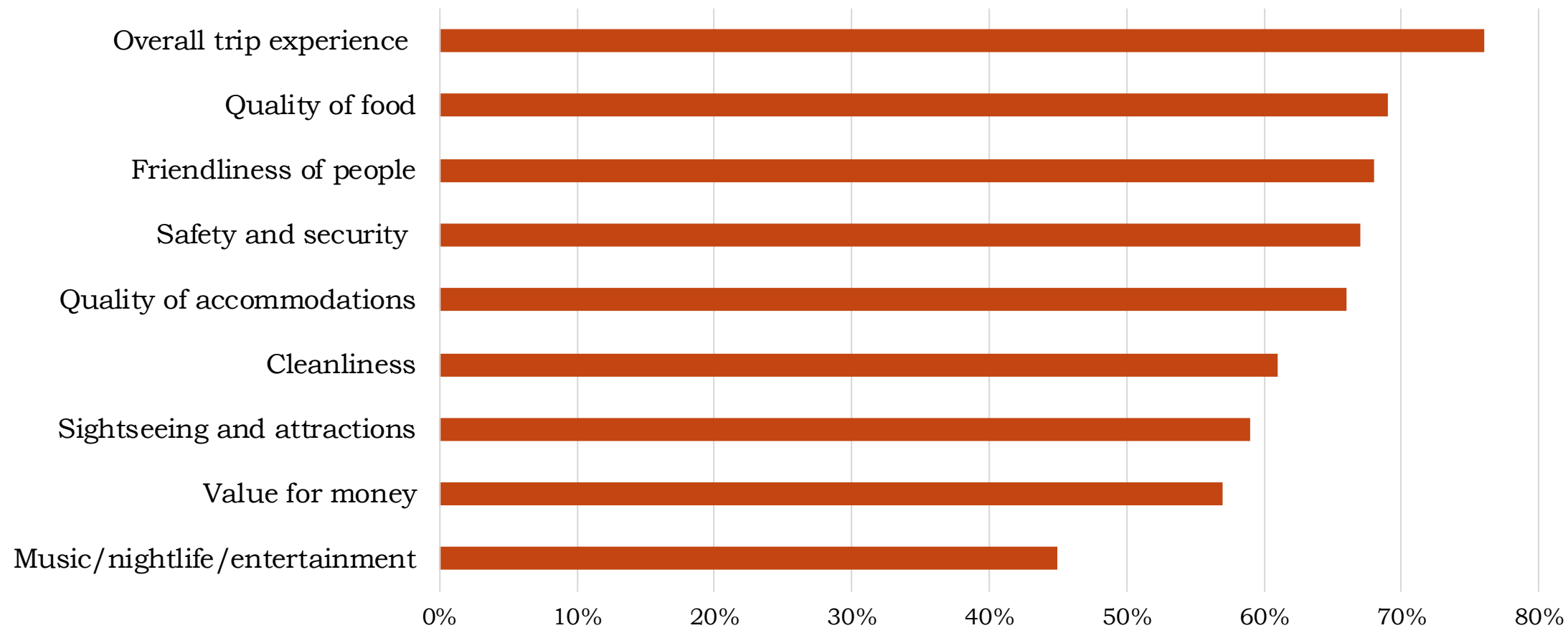


Source: Longwoods International



# Satisfaction with Trip - % Very Satisfied

Tucson & Southern Region



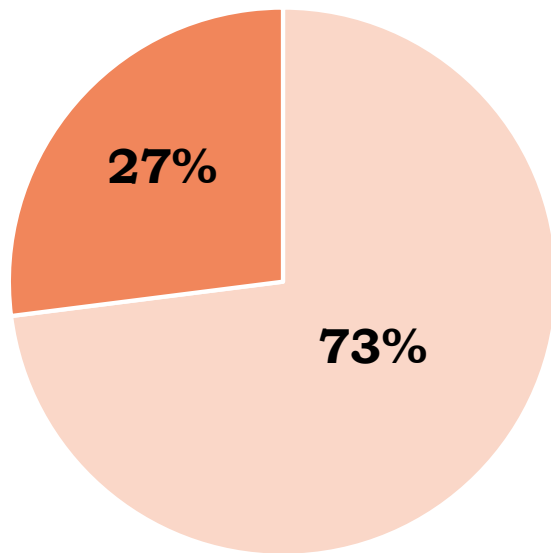




# Past Visitation

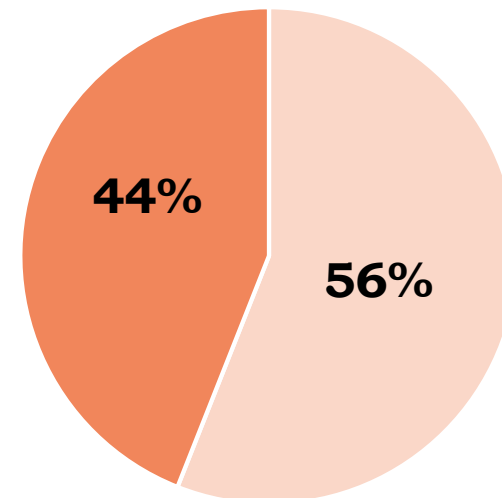
Tucson & Southern Region

Have you ever visited the Tucson & Southern Region before?



■ Yes ■ No

Have you visited the Tucson & Southern Region in the past 12 months?

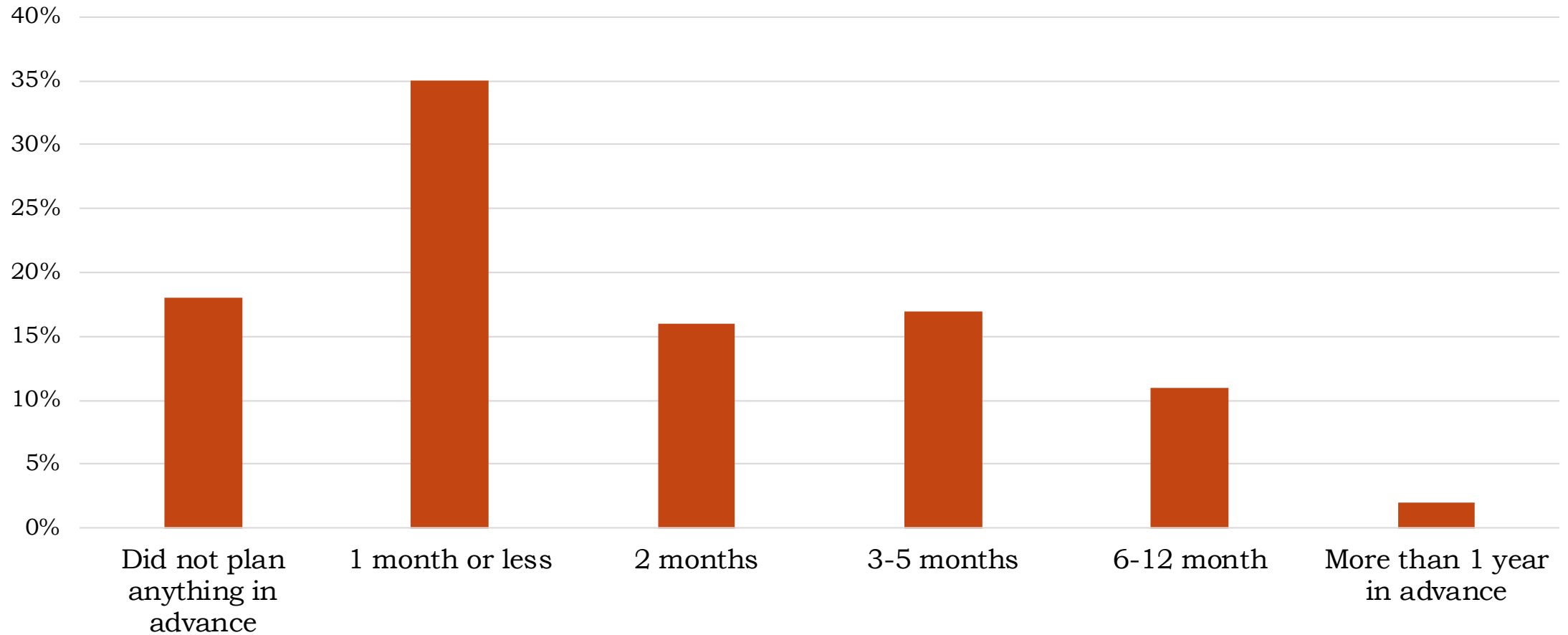


■ Yes ■ No



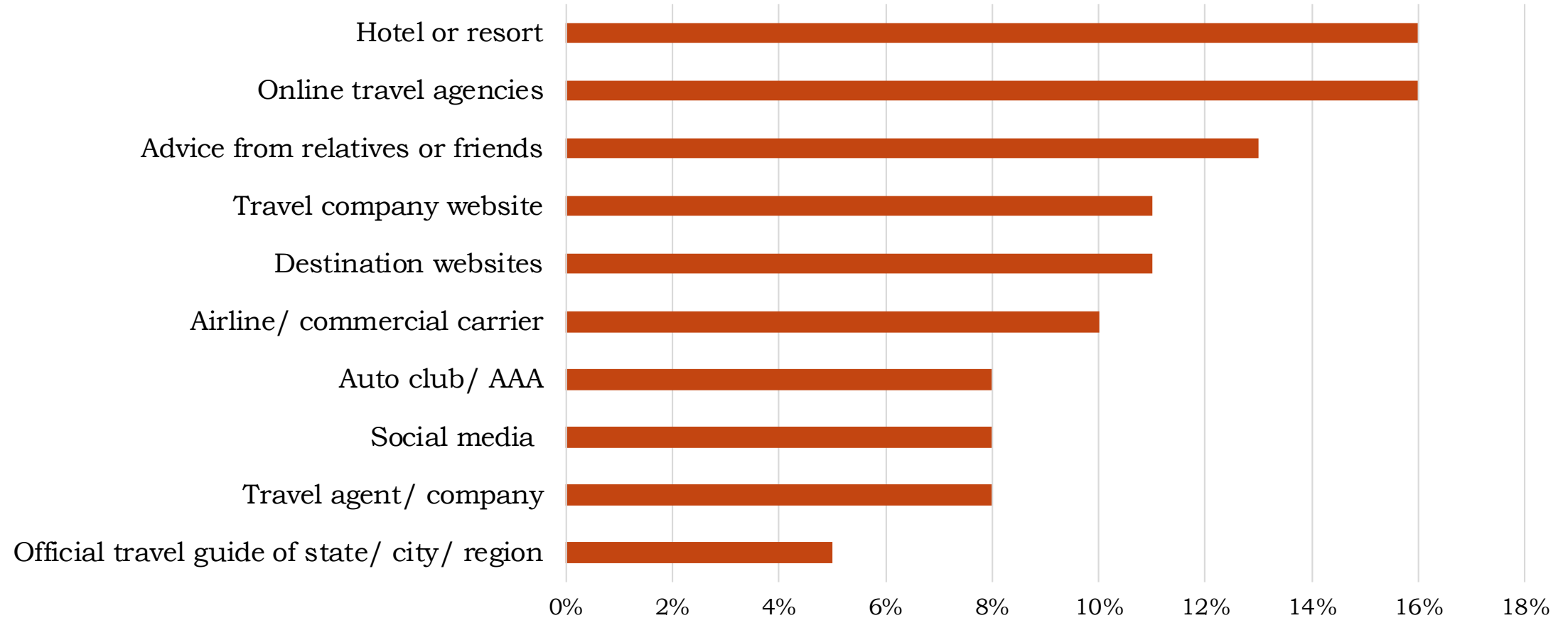
# Length of Trip Planning

Tucson & Southern Region



# Trip Planning Information Sources

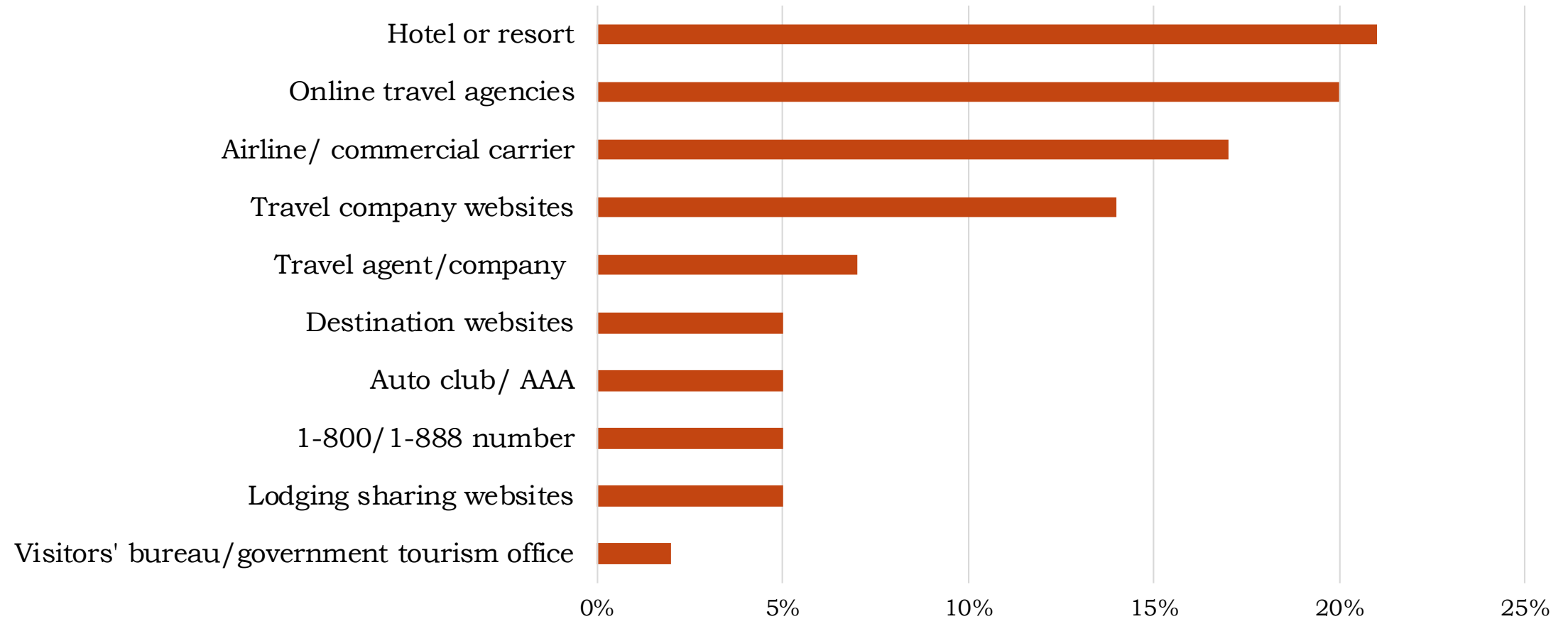
Tucson & Southern Region





# Method of Booking

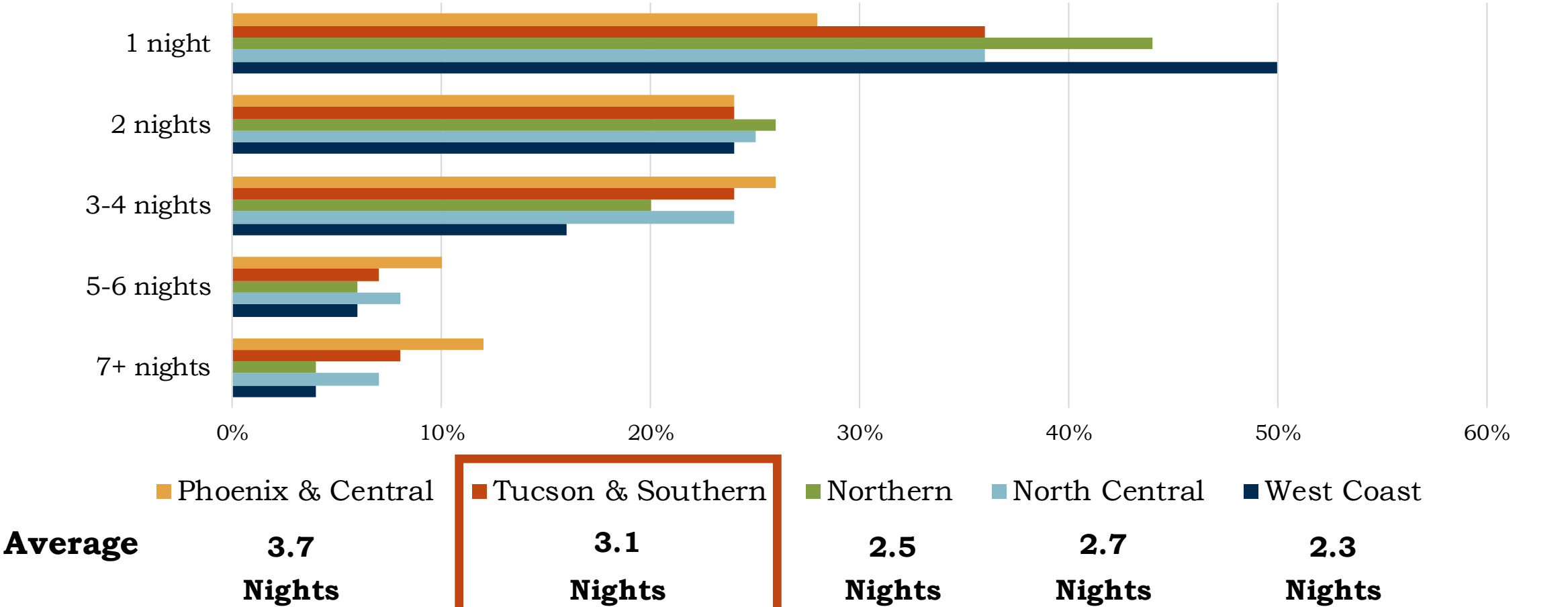
Tucson & Southern Region





# Number of Nights Spent in Each Region

Tucson & Southern Region

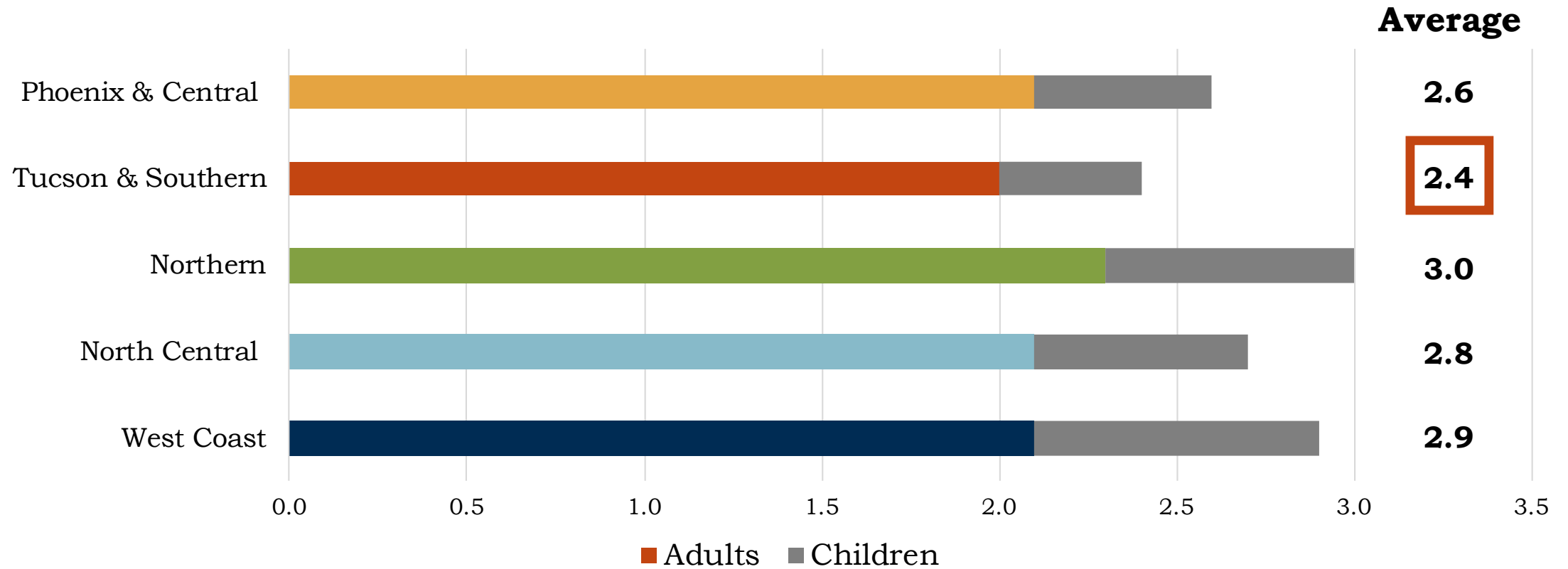


Source: Longwoods International, 2018



# Size of Travel Party

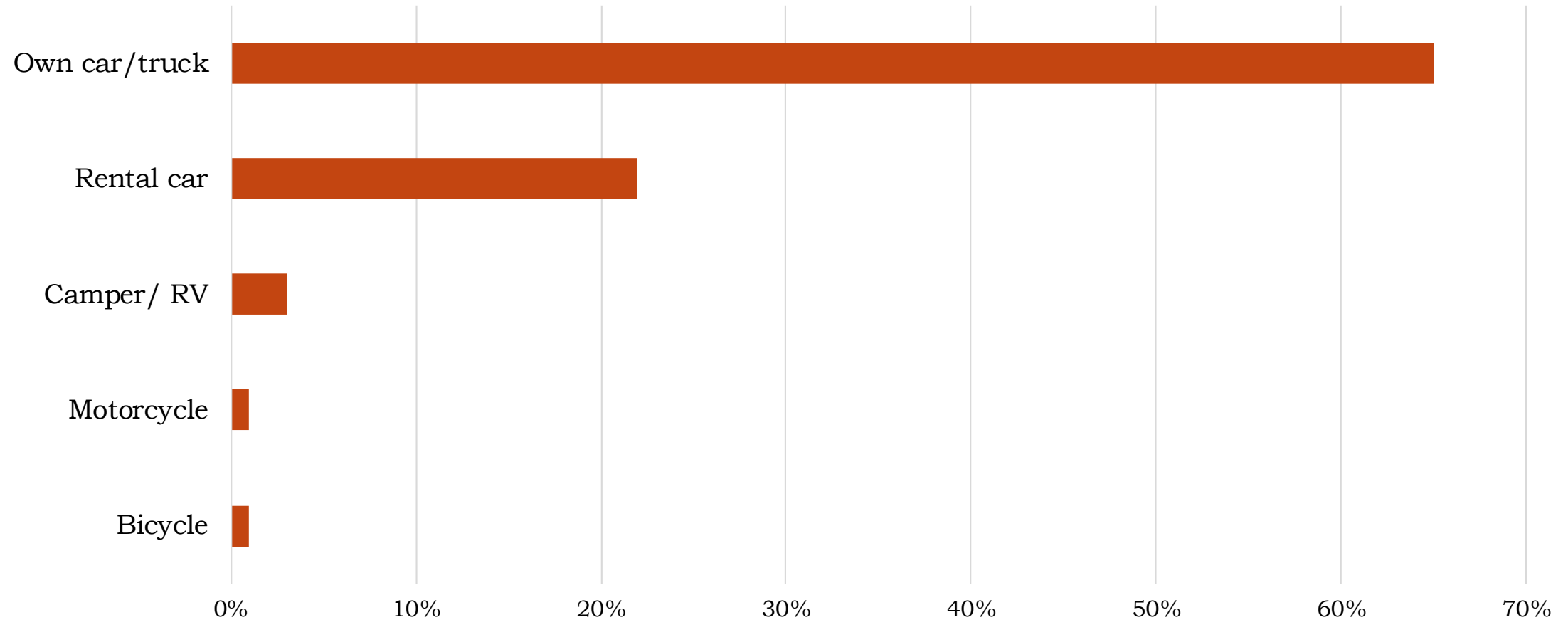
Tucson & Southern Region





# Transportation – Private Vehicles

Tucson & Southern Region

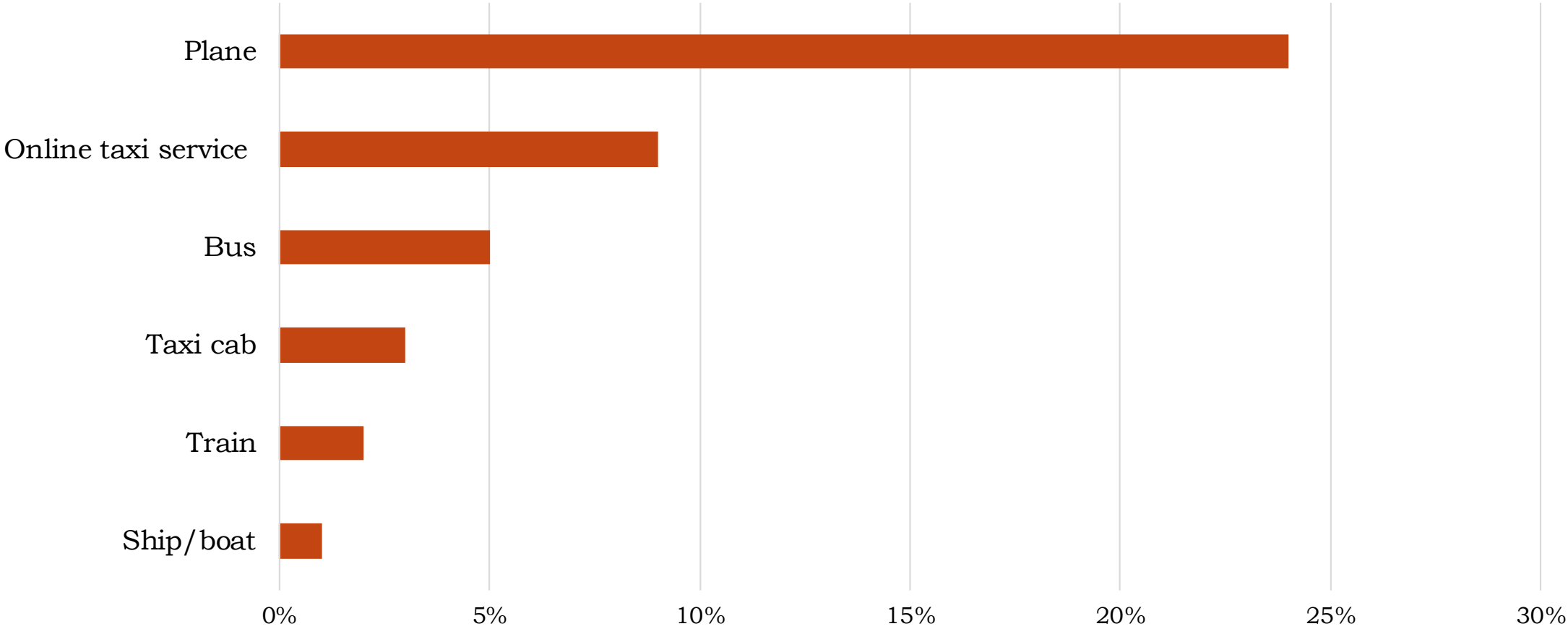


Source: Longwoods International



# Transportation – Commercial Vehicles

Tucson & Southern Region



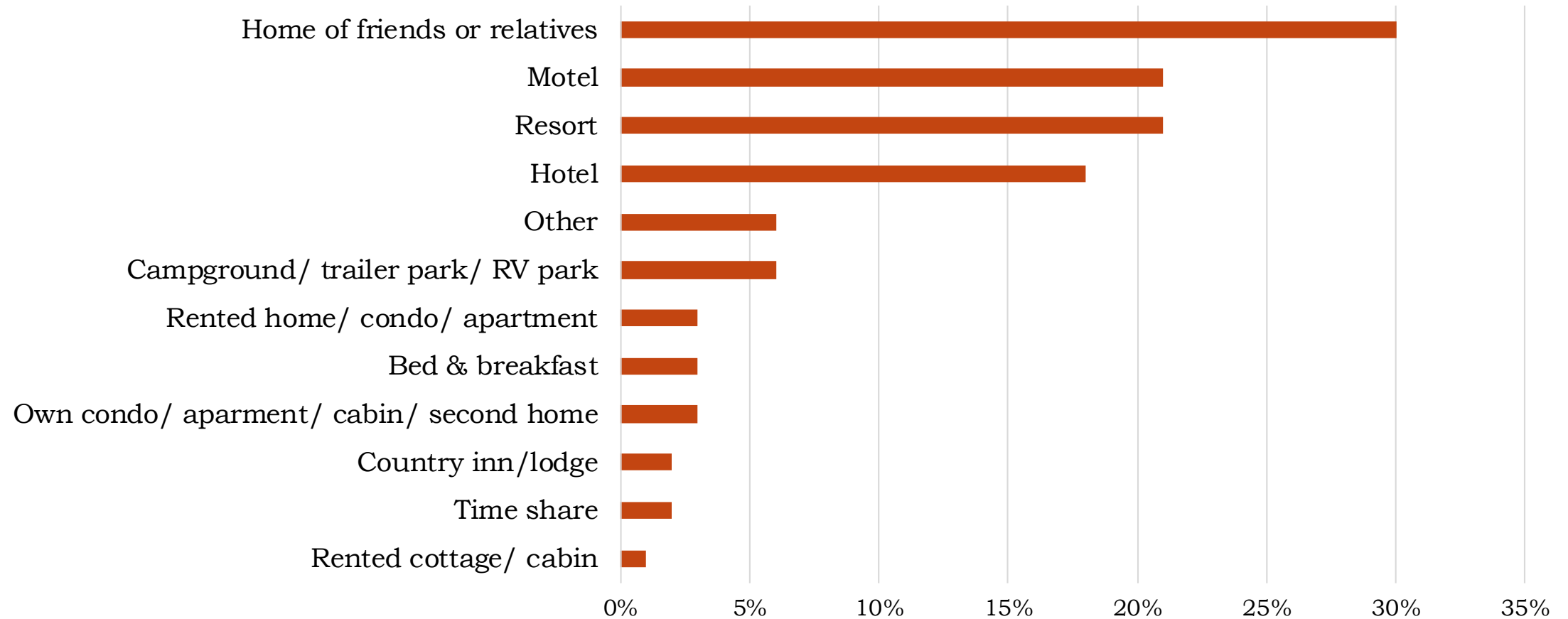
Source: Longwoods International





# Accommodation

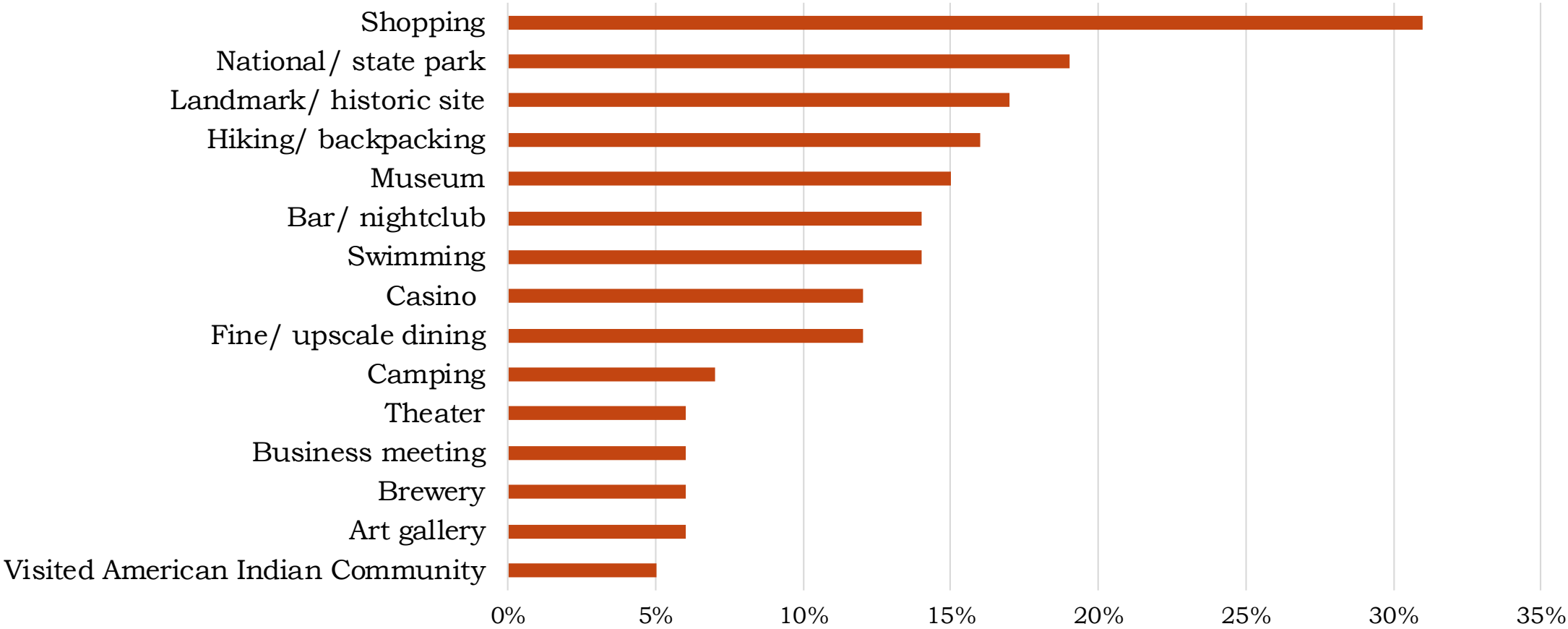
Tucson & Southern Region





# Activities and Experiences

Tucson & Southern Region

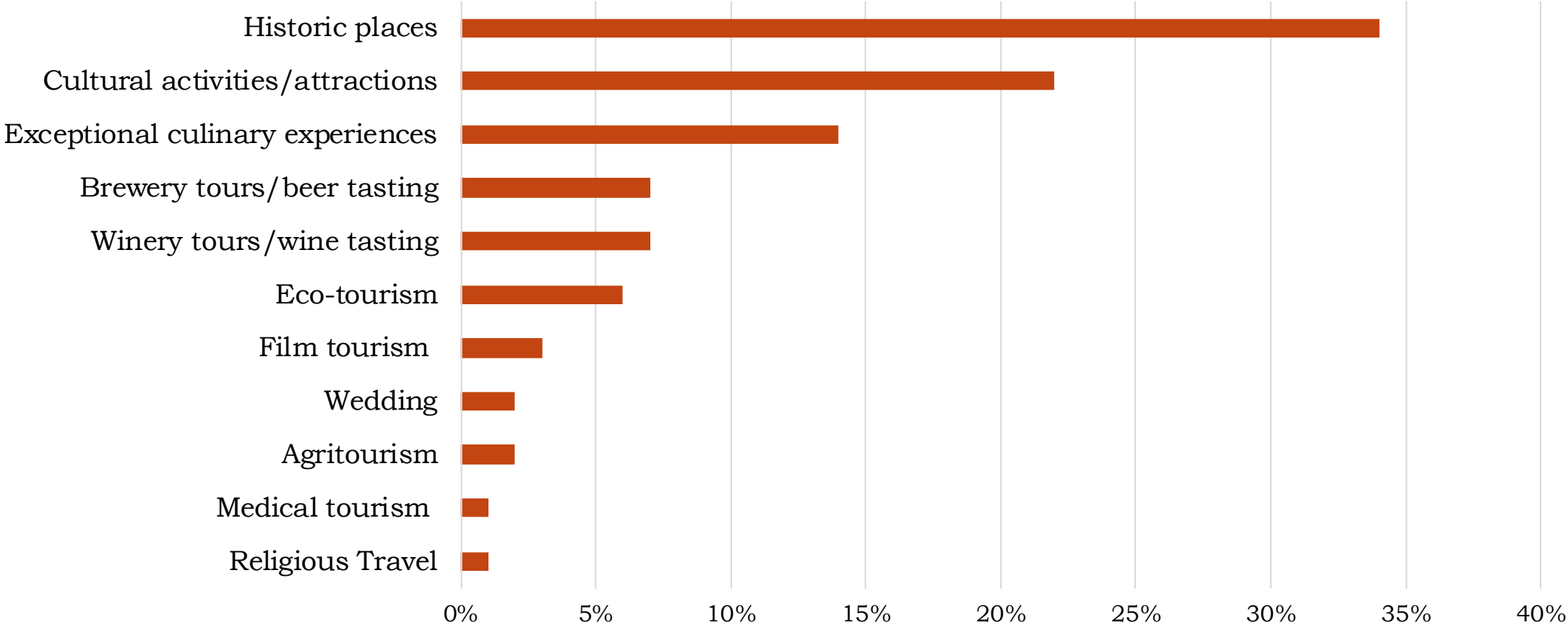


Source: Longwoods International



# Activities of Special Interest

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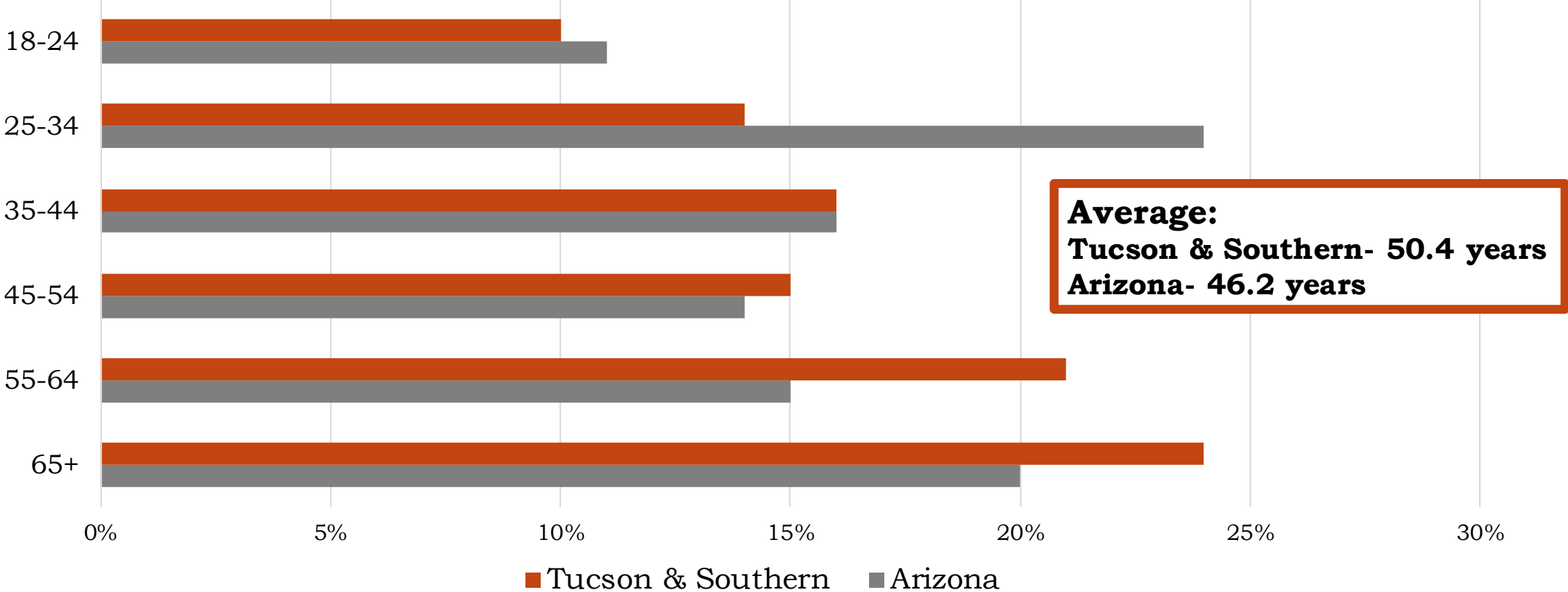


Source: Longwoods International



# Age

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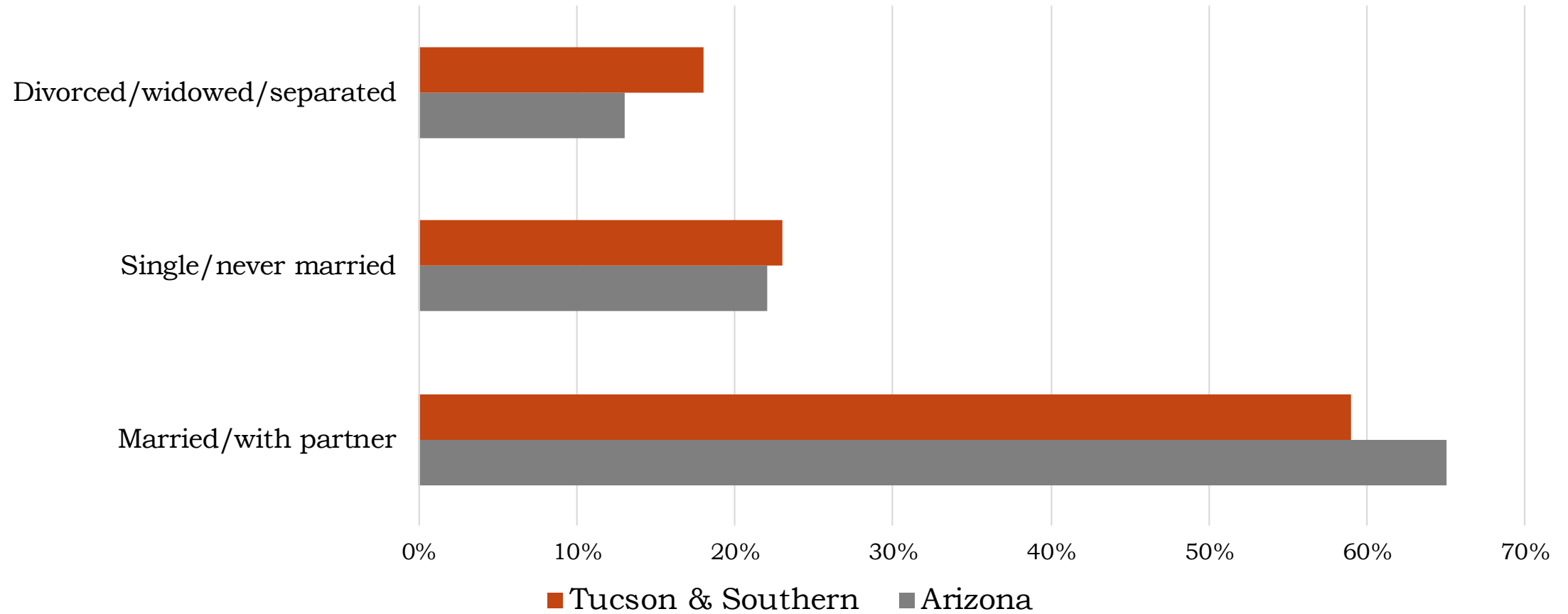


Source: Longwoods International



# Marital Status

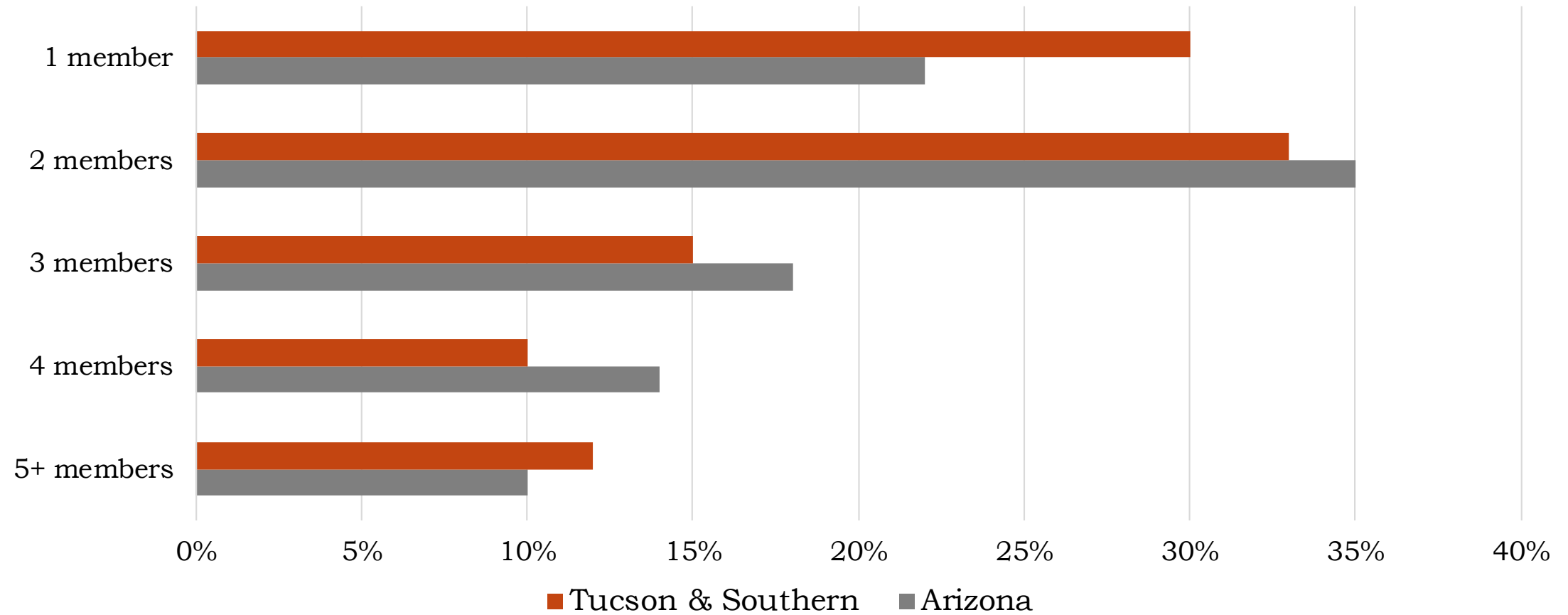
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# Household Size

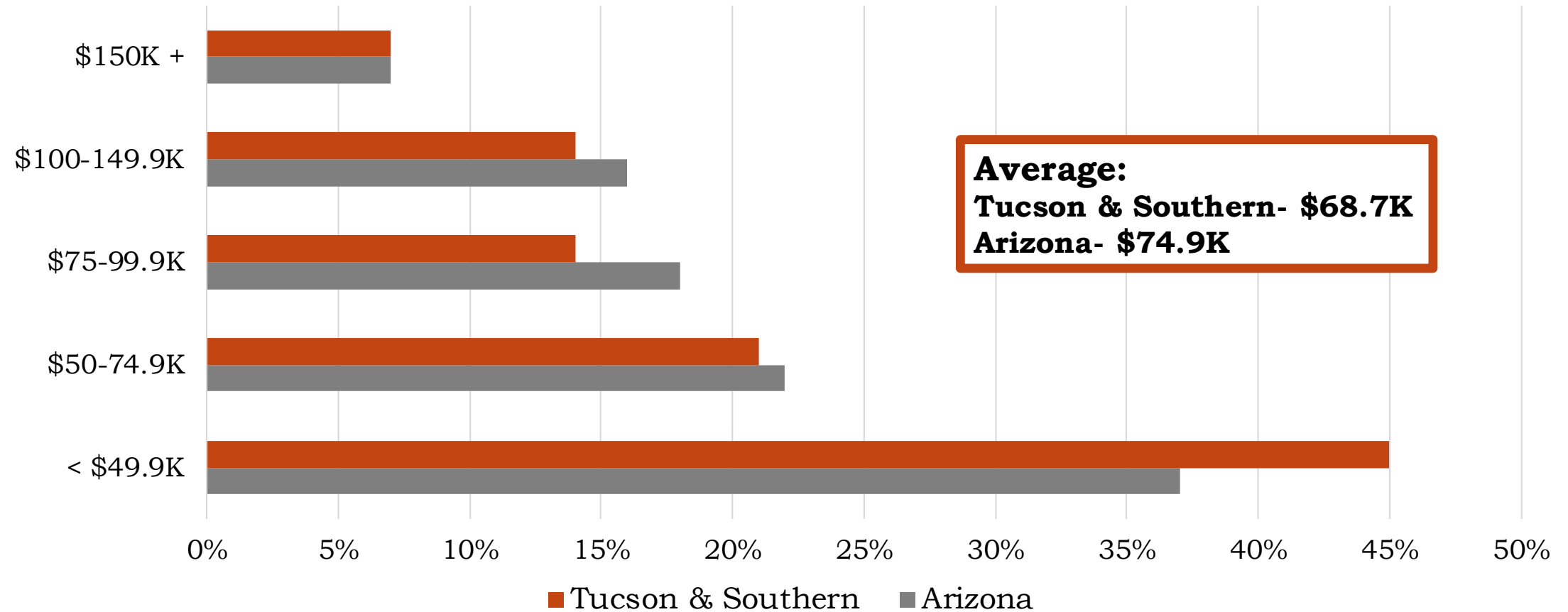
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# Household Income

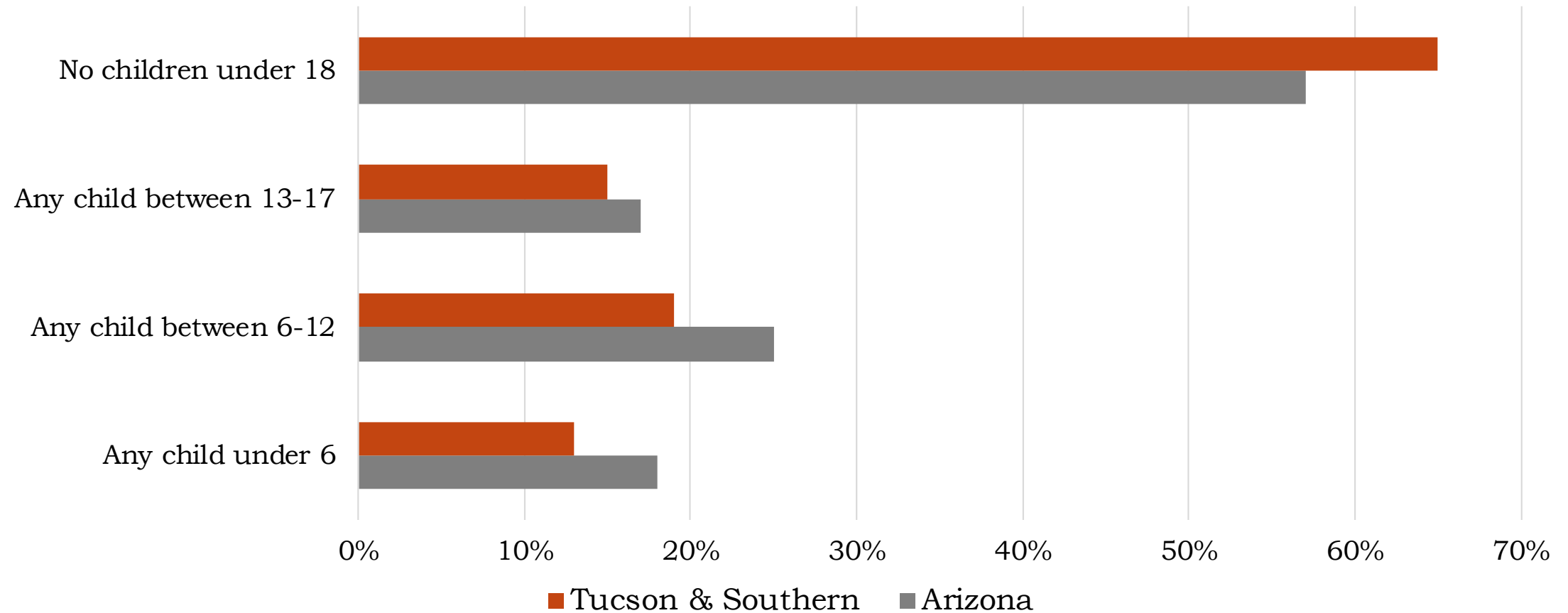
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# Children in Household

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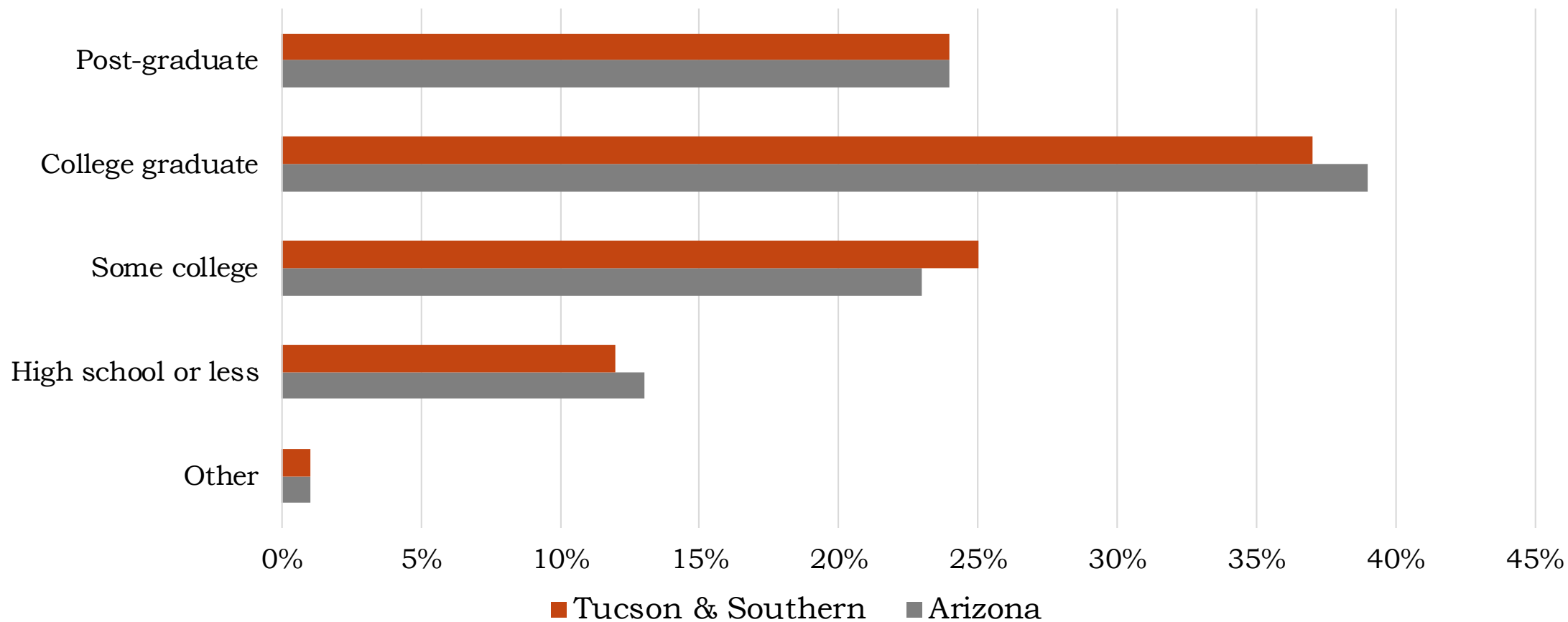






# Education

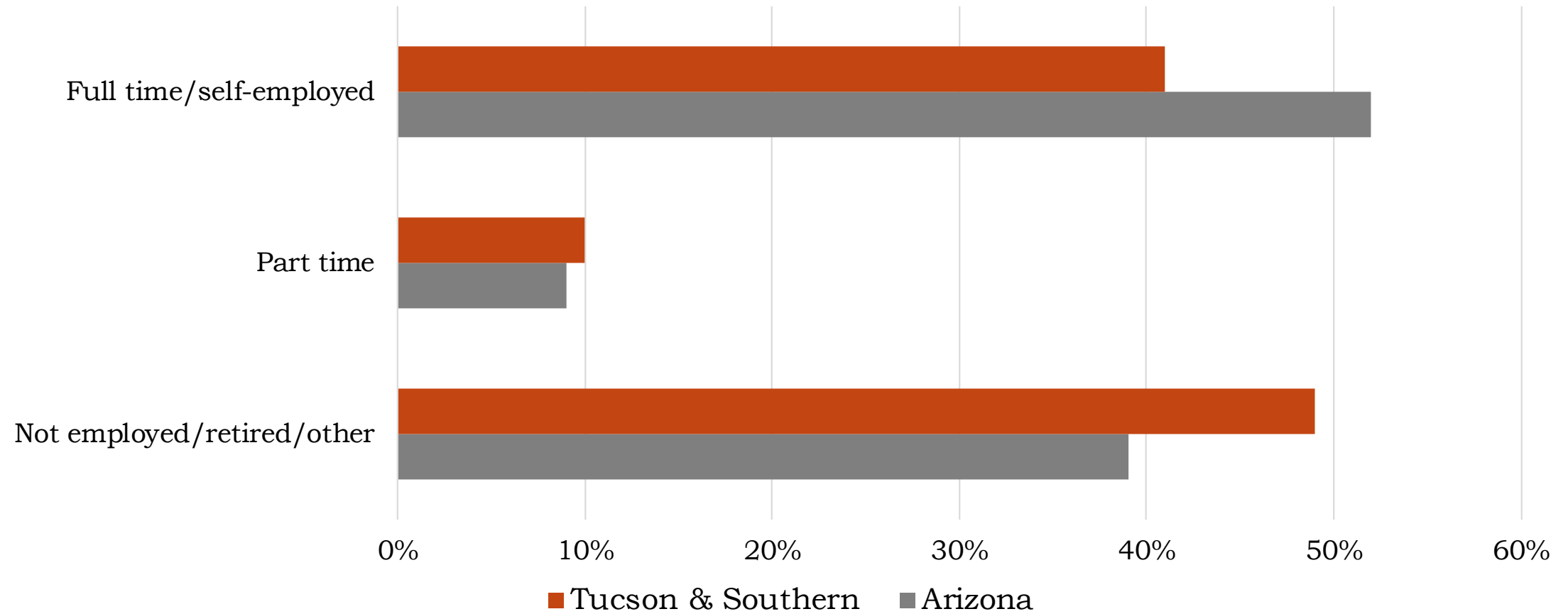
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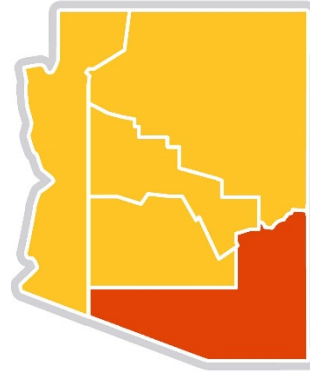


# Employment

## Tucson & Southern Region



# Stay Connected



Presentation slides available at:

<http://tourism.az.gov/regional-profiles>

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