



West Coast Region 2018 Year-End Data Review

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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

West Coast 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 Spending
Up 7.8% YOY

2018 West Coast Region Tourism Industry Performance

6.9 million
Domestic Overnight
Visitors



\$1.44 billion
Direct Spending



Regional Impacts, 2018

West Coast Region



\$1.44 Billion

Up 4.5%

Direct Spending



14,710

Up 1.4%

Jobs



\$120 Million

Up 6.2%

State and Local Taxes



\$406 Million

Up 5.3%

Earnings



County Impacts, 2018

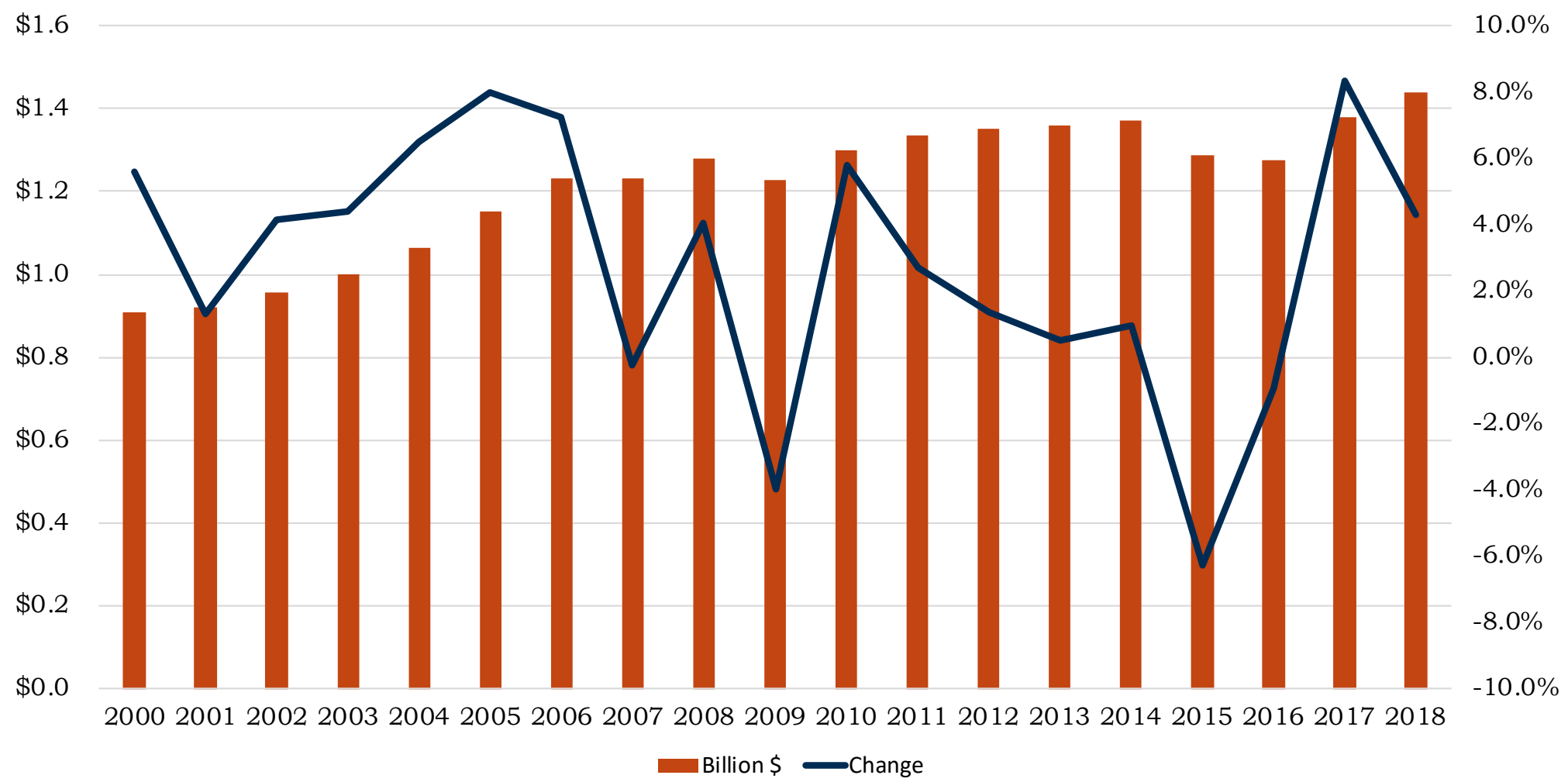
West Coast Region

	Spending (\$million)	Jobs	Earnings (\$millions)	State and Local Taxes (\$millions)	Tax Revenue per Household
La Paz	\$164	1,410	\$41	\$13.5	\$1,420
YOY % change	12.3%	8.1%	13.7%	16.4%	
Mohave	\$630	7,090	\$196	\$54.6	\$630
YOY % change	5.0%	2.0%	5.8%	7.1%	
Yuma	\$651	6,210	\$169	\$52.2	\$750
YOY % change	2.3%	-0.6%	2.9%	3.4%	



Regional Direct Travel Spending

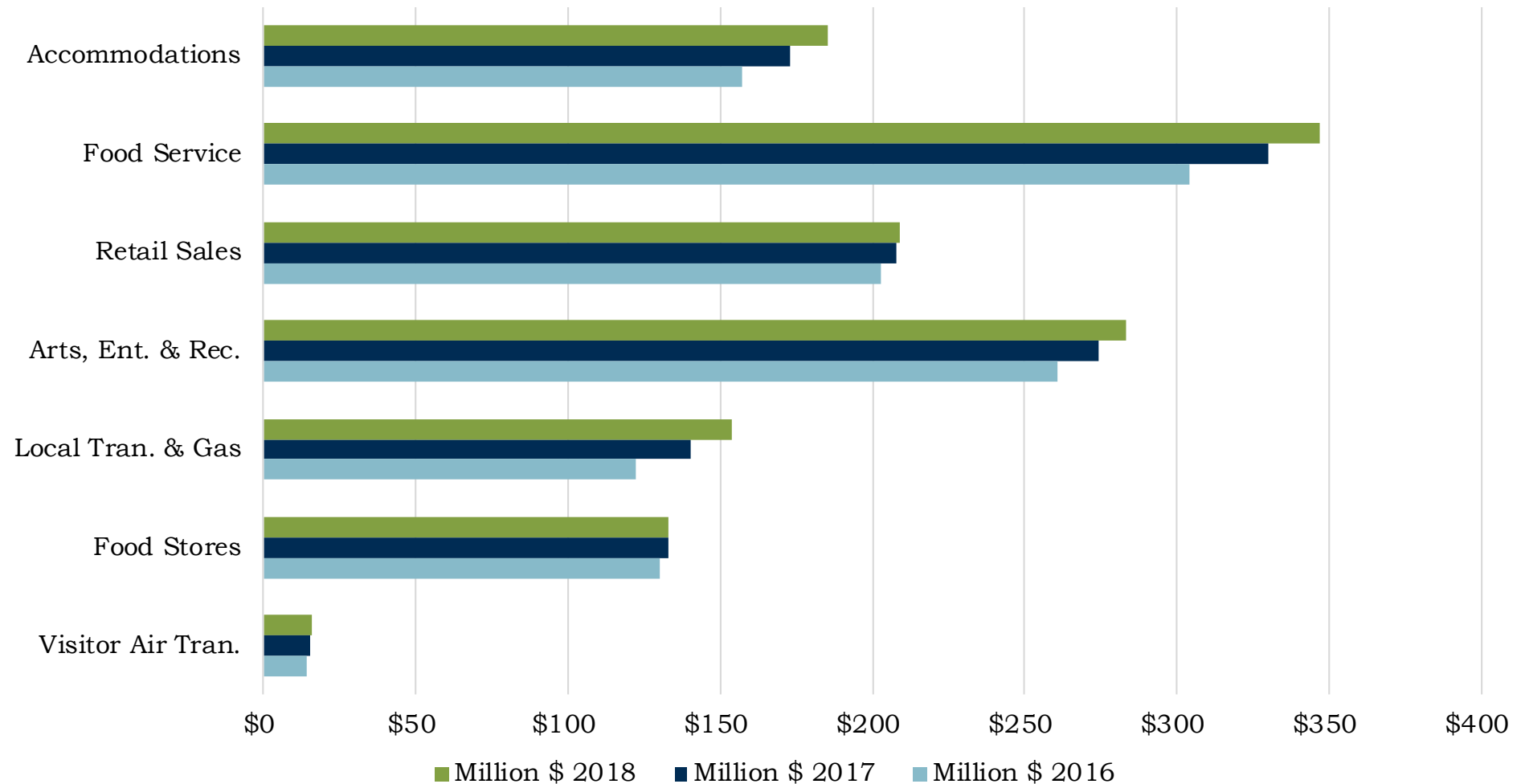
West Coast Region



Source: Dean Runyan Associates

Spending by Commodity Purchased

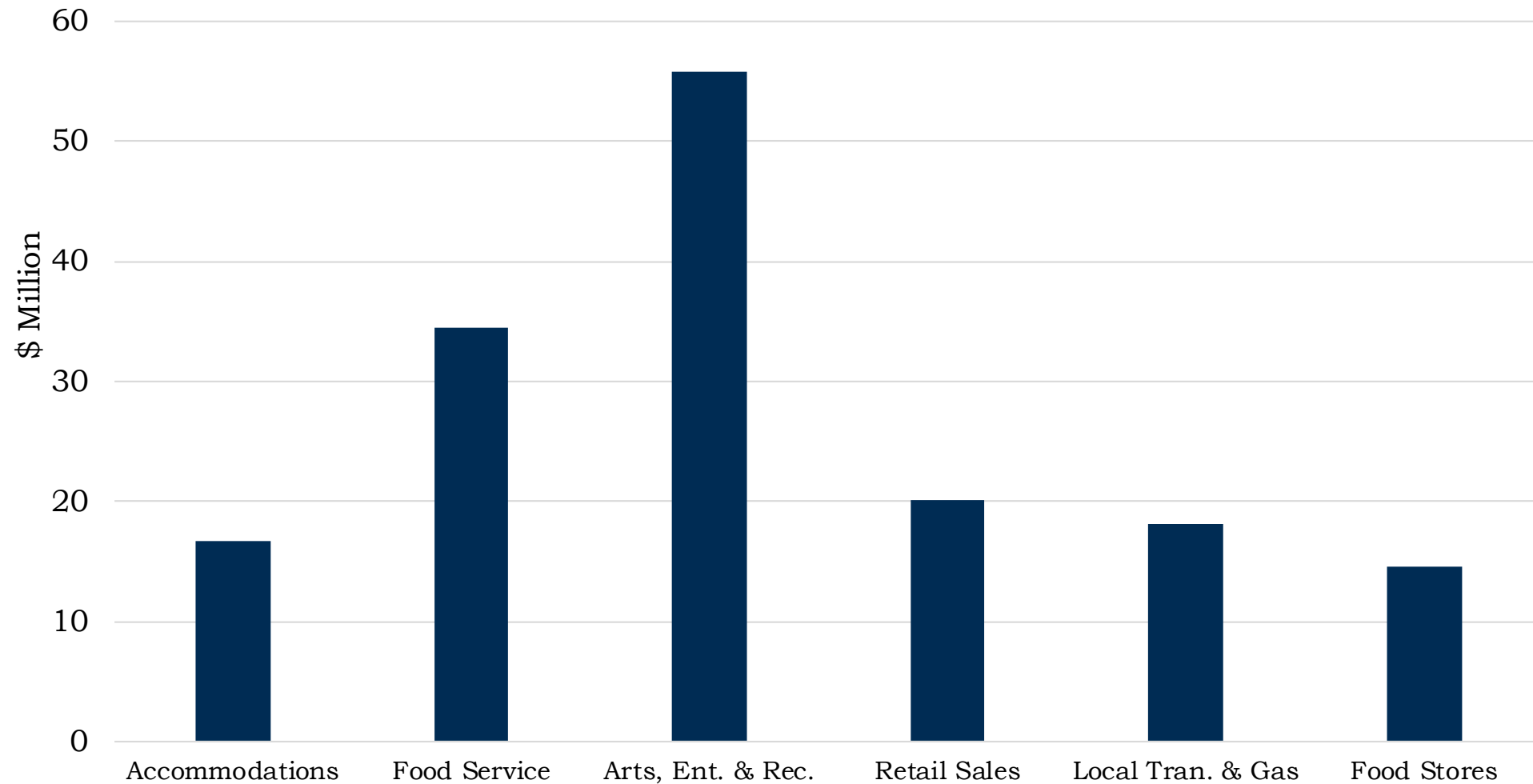
West Coast Region





Spending by Commodity Purchased

La Paz County

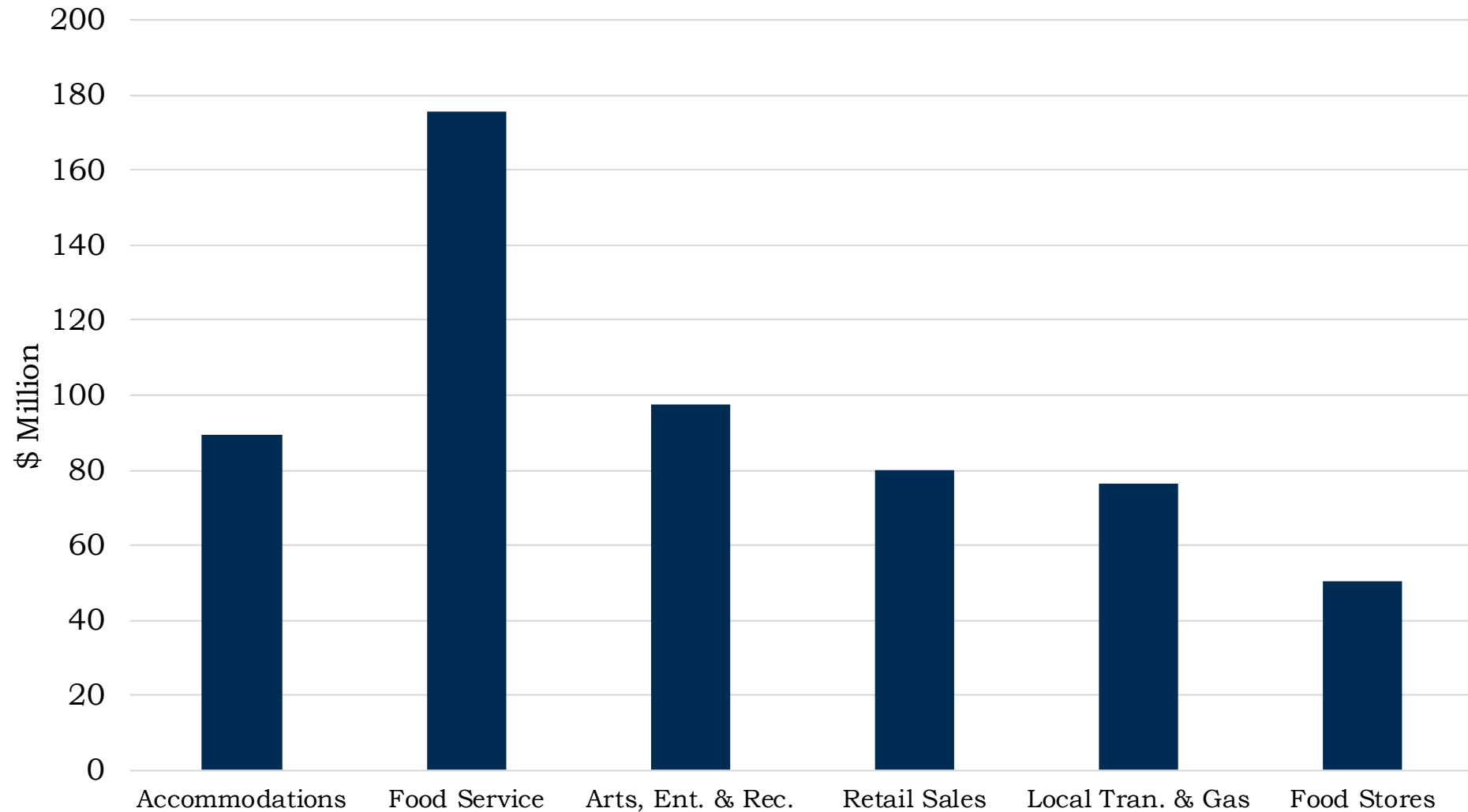


Source: Dean Runyan Associates, 2018



Spending by Commodity Purchased

Mohave County

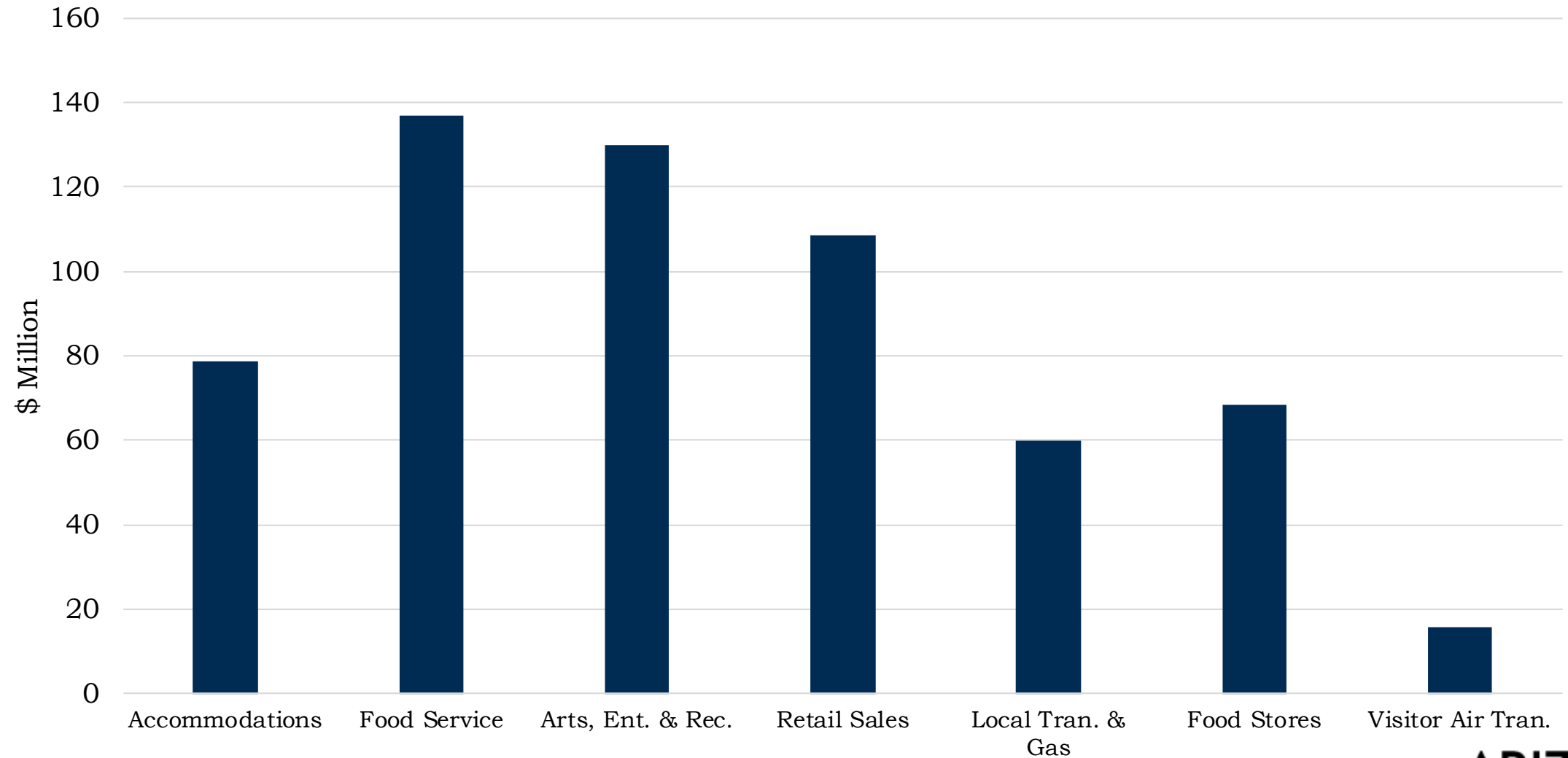


Source: Dean Runyan Associates, 2018



Spending by Commodity Purchased

Yuma County

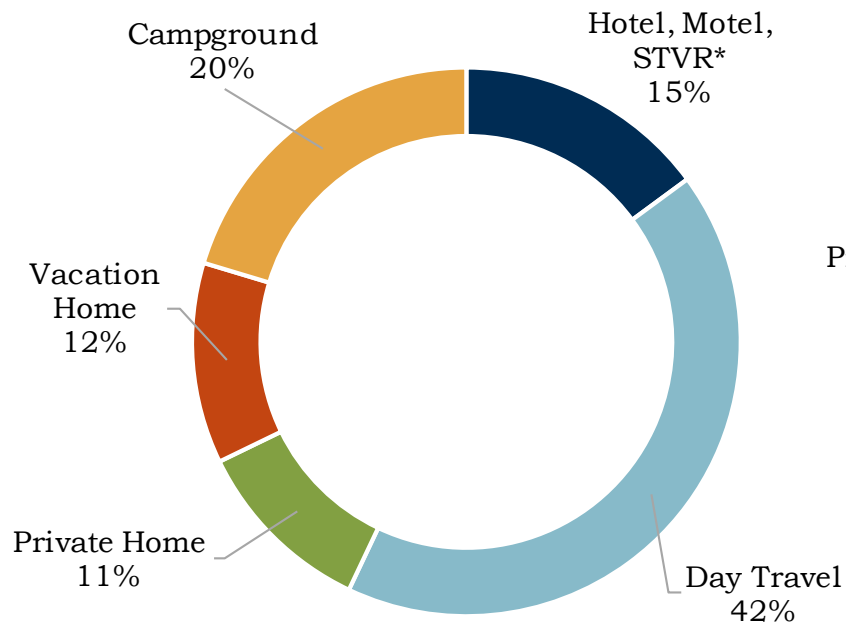


Source: Dean Runyan Associates, 2018

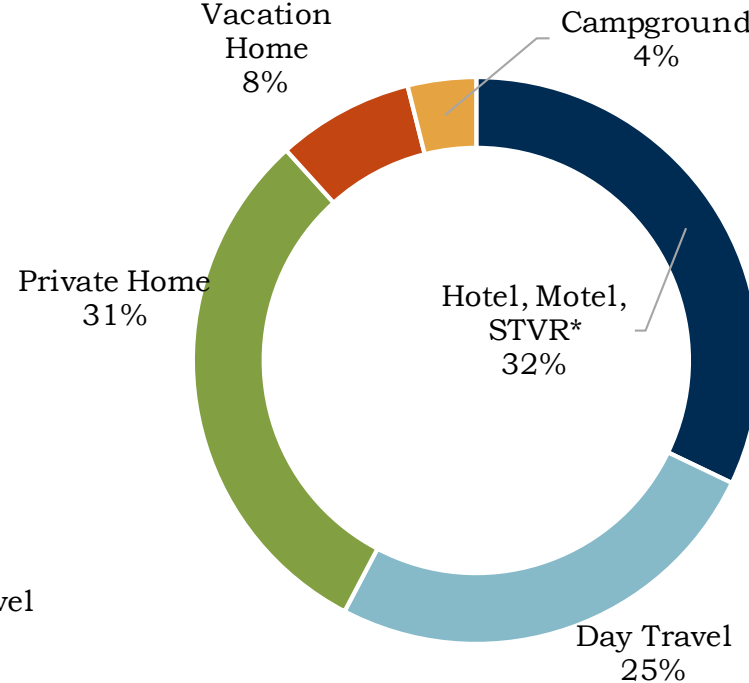
Spending by Type of Accommodation

West Coast Region

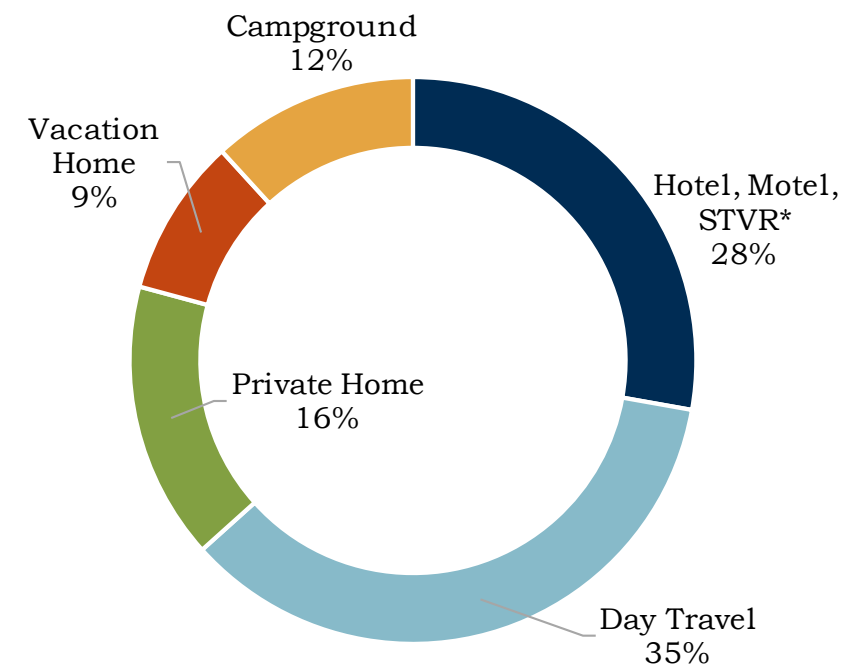
La Paz County



Mohave County



Yuma County





2019 Tourism Indicators To-Date

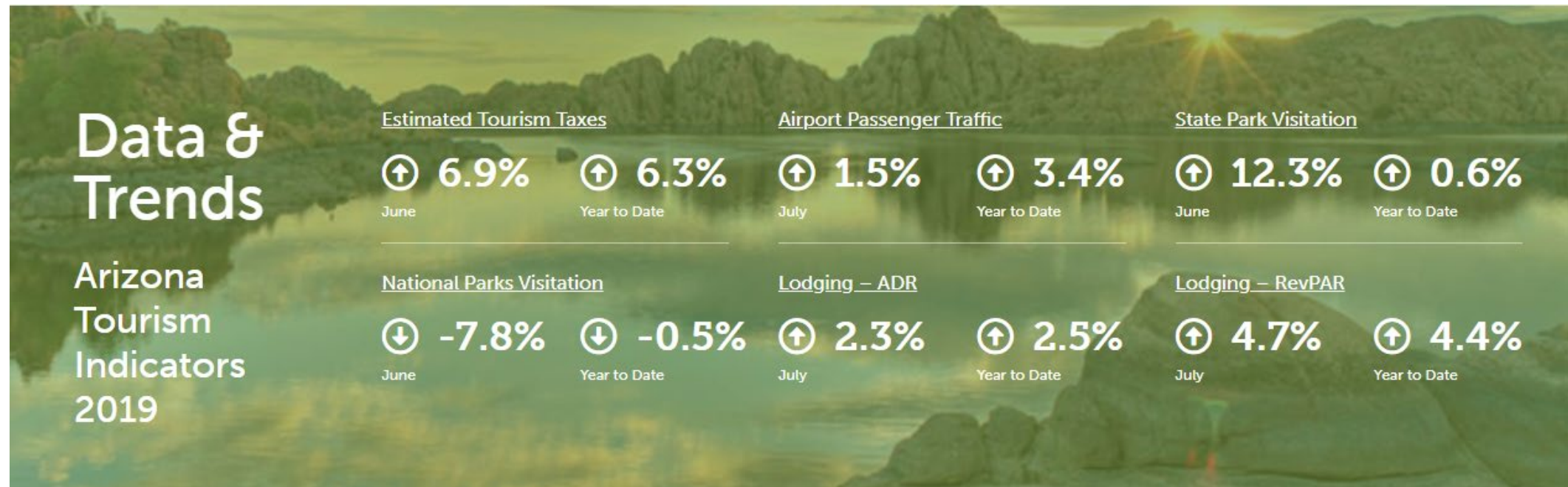
West Coast Region





Tourism Indicators

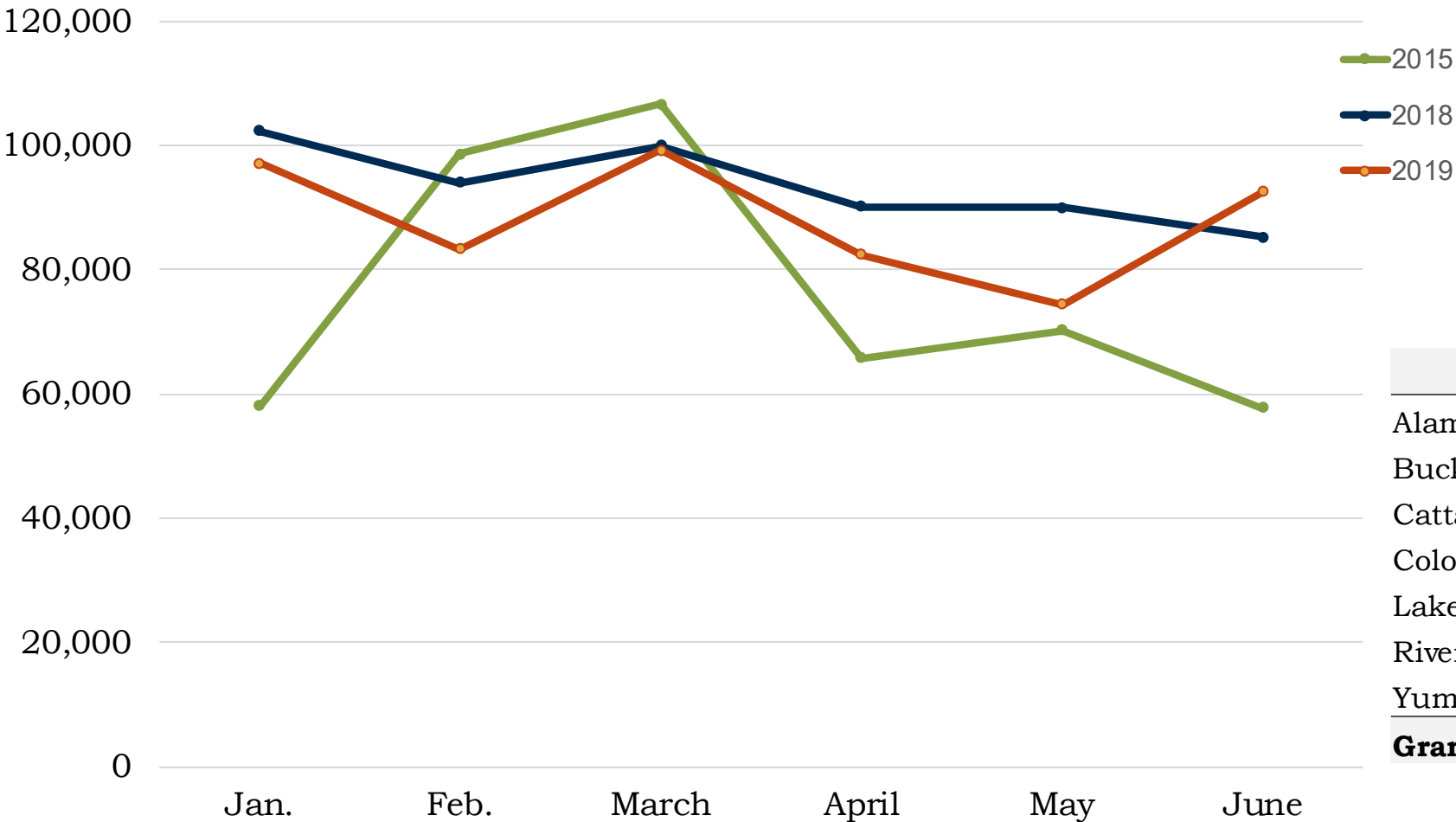
<http://tourism.az.gov/data-trends/>





State Park Visitation

West Coast Region



Jan.-June YTD Visitation

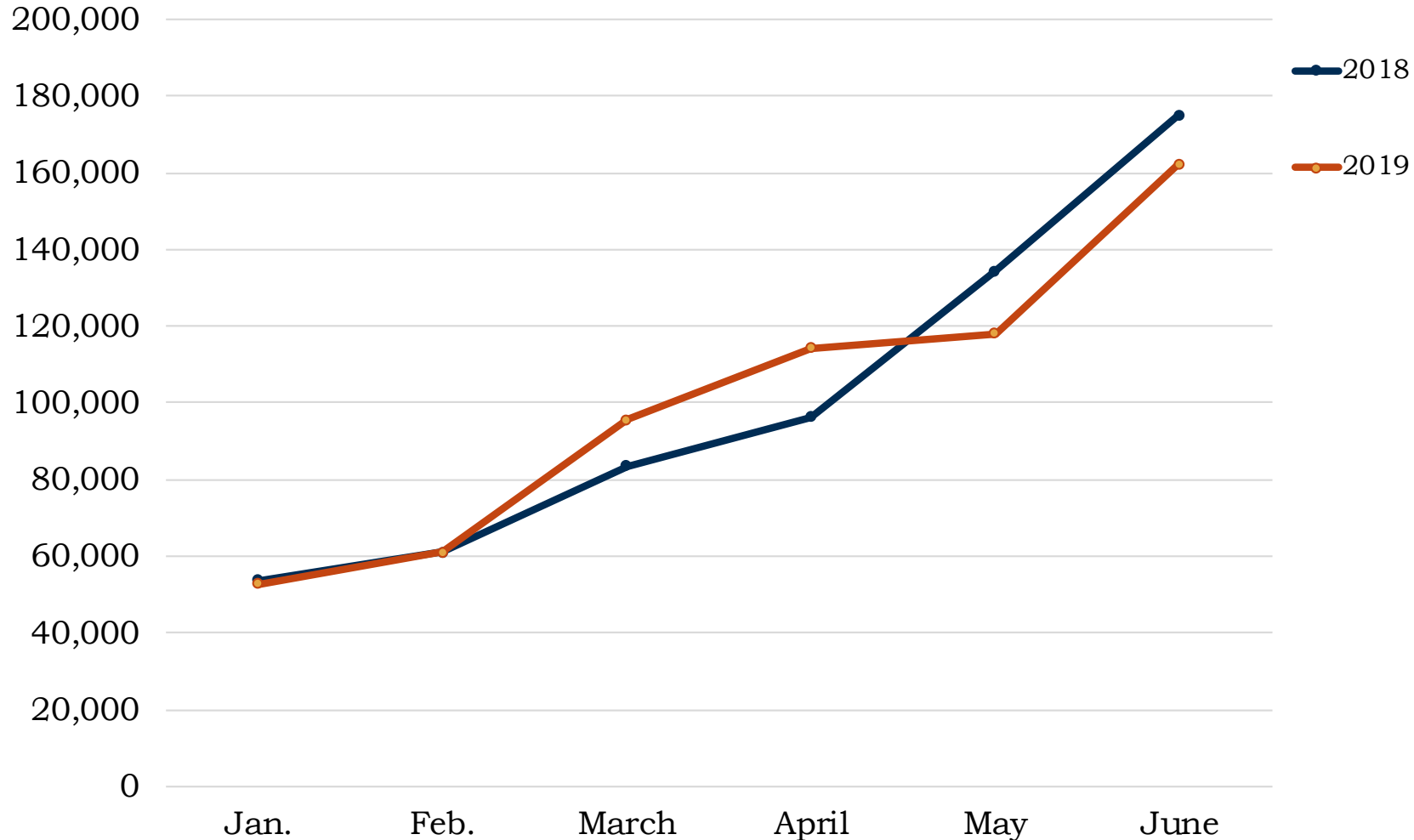
	2019 YTD
Alamo Lake SP	43,799
Buckskin Mountain SP	44,749
Cattail Cove SP	62,581
Colorado River SHP	8,424
Lake Havasu SP	305,804
River Island SP	19,155
Yuma Territorial Prison SHP	44,595
Grand Total	529,107

Source: Northern Arizona University, Arizona State Parks



National Park Visitation

West Coast Region



Jan.-June YTD Visitation

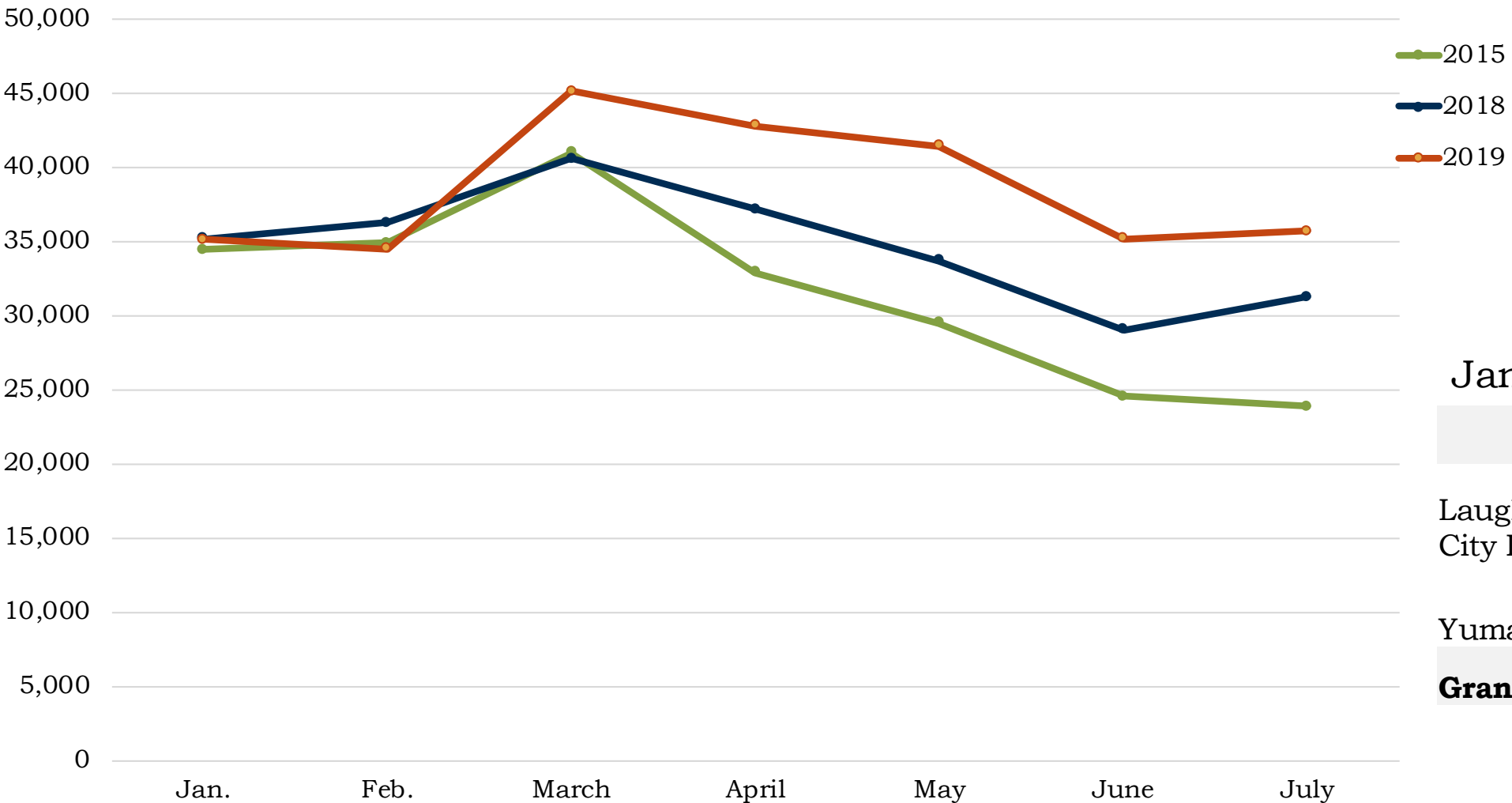
	2019 YTD
Lake Mead NRA	590,194
Pipe Spring NM	13,887
Grand Total	604,081

Source: Northern Arizona University, National Park Service



Airport Passenger Volume

West Coast Region



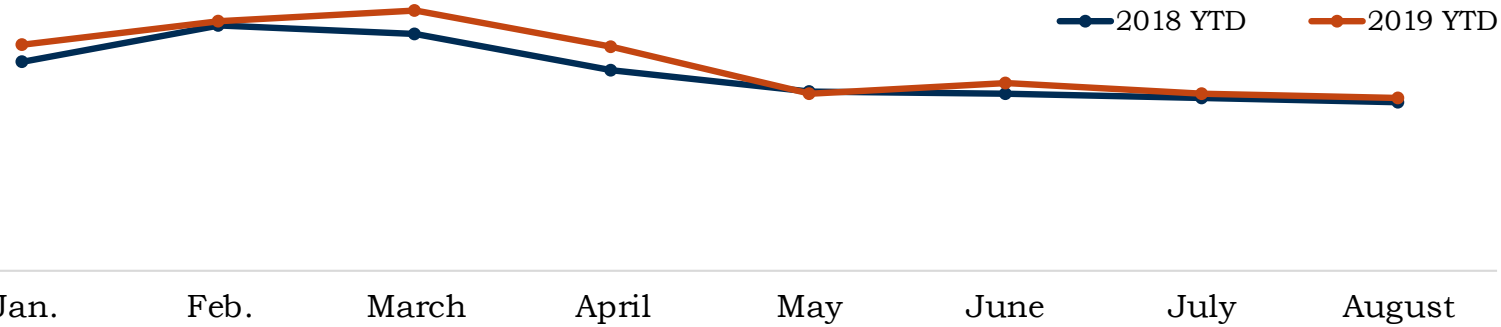
Jan.-July YTD Volume

	2019 YTD
Laughlin/Bullhead City International	156,906
Yuma International	112,922
Grand Total	125,271



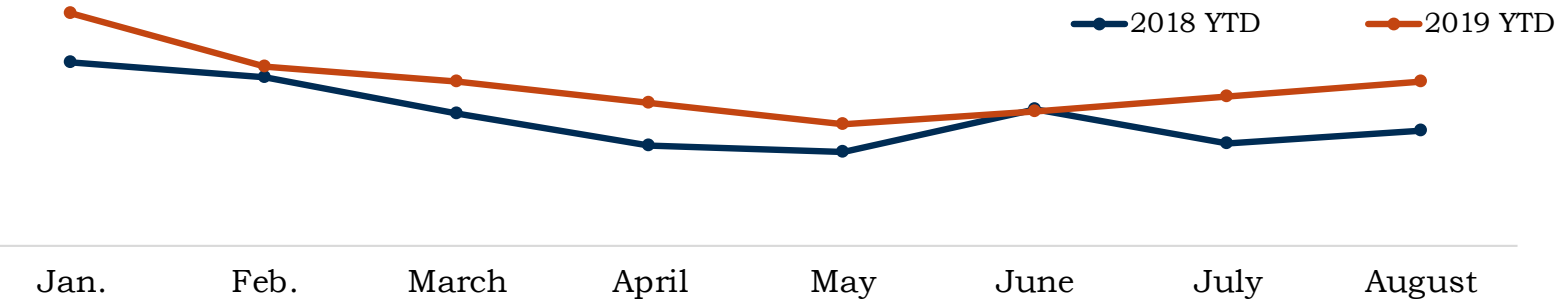
Lodging Indicators

La Paz County



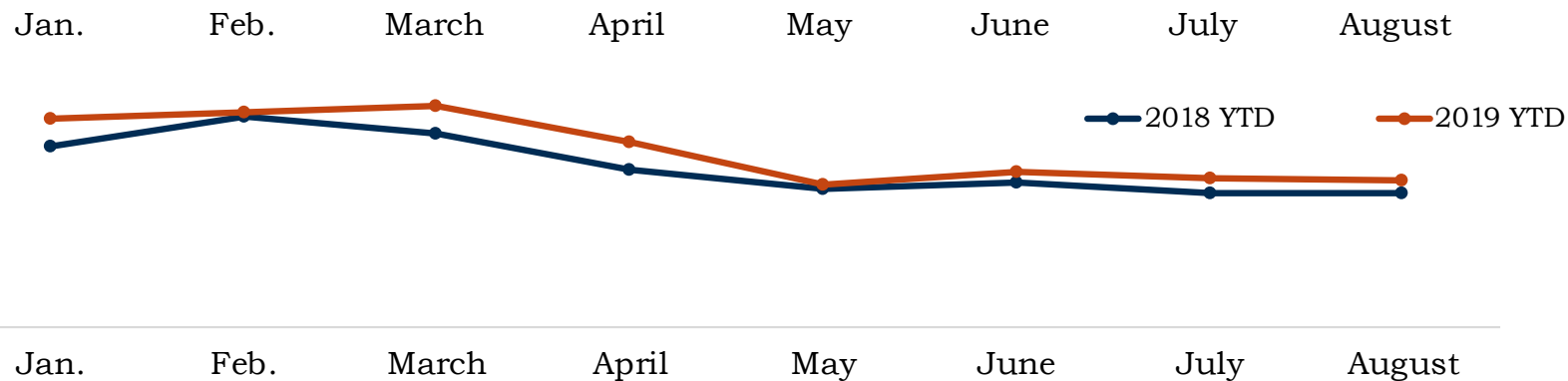
Occupancy

YTD Change = 5.5%



ADR

YTD Change = 4.2%



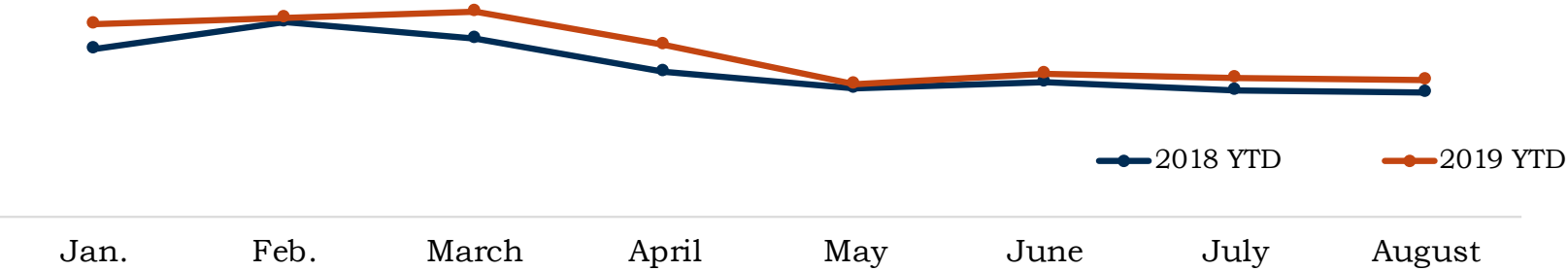
RevPAR

YTD Change = 9.9%

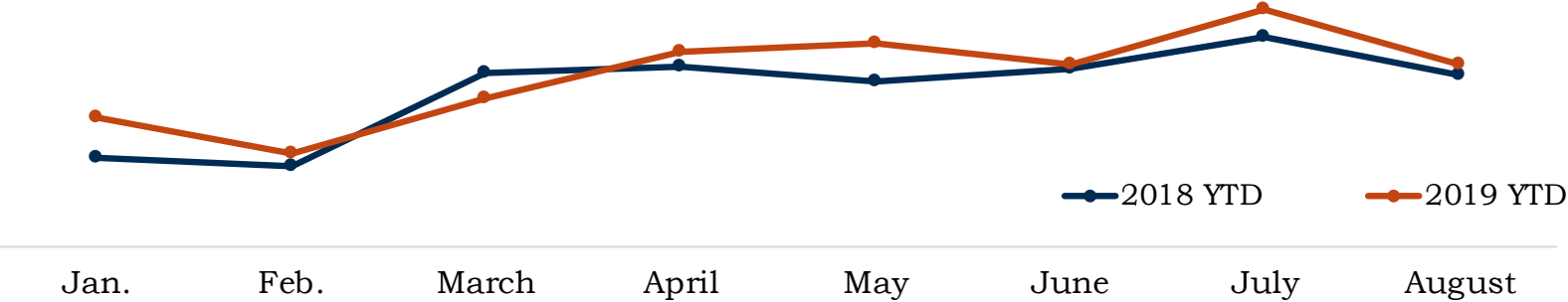


Lodging Indicators

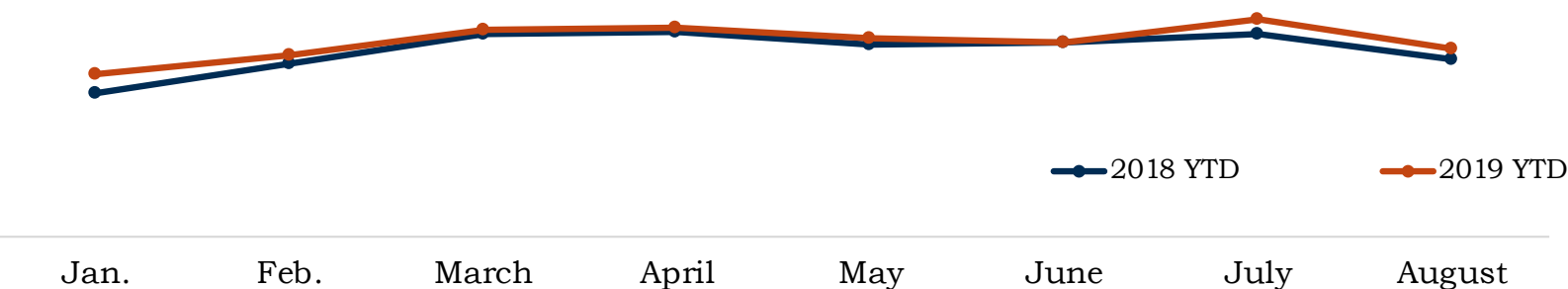
Mohave County



Occupancy
YTD Change = 3.4%



ADR
YTD Change = 1.1%

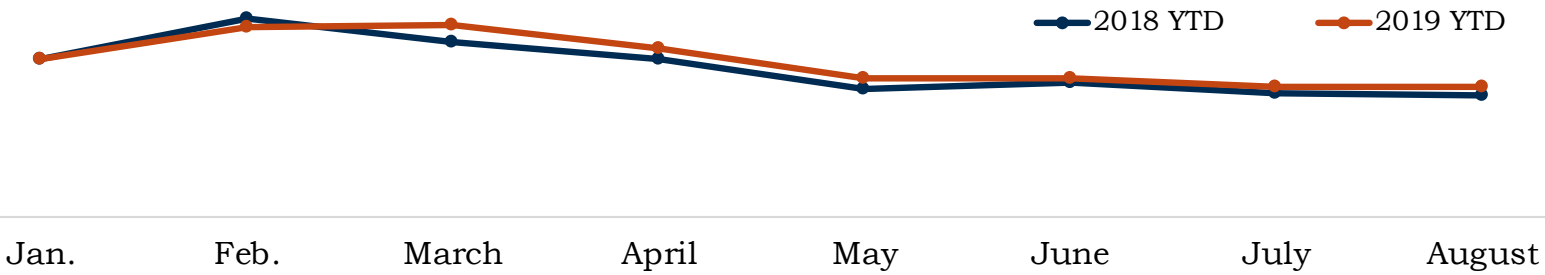


RevPAR
YTD Change = 4.6%

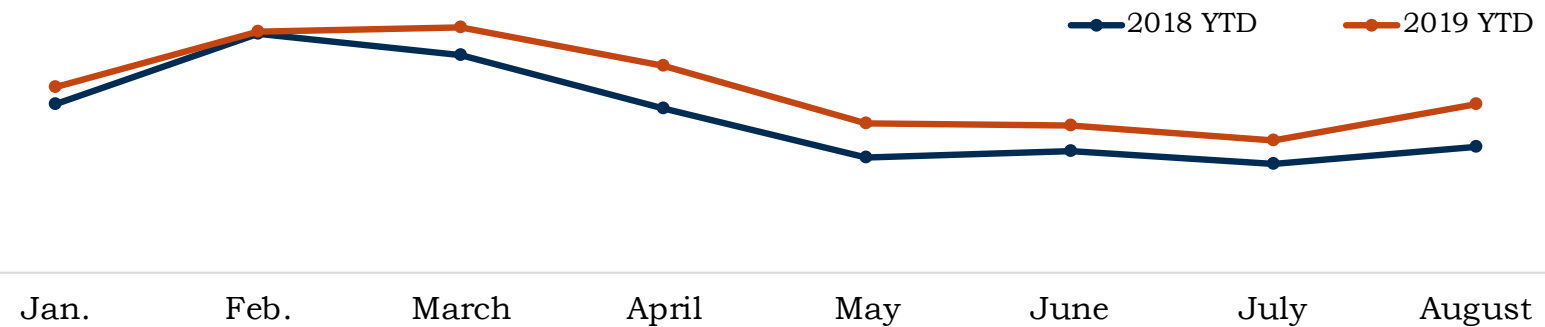


Lodging Indicators

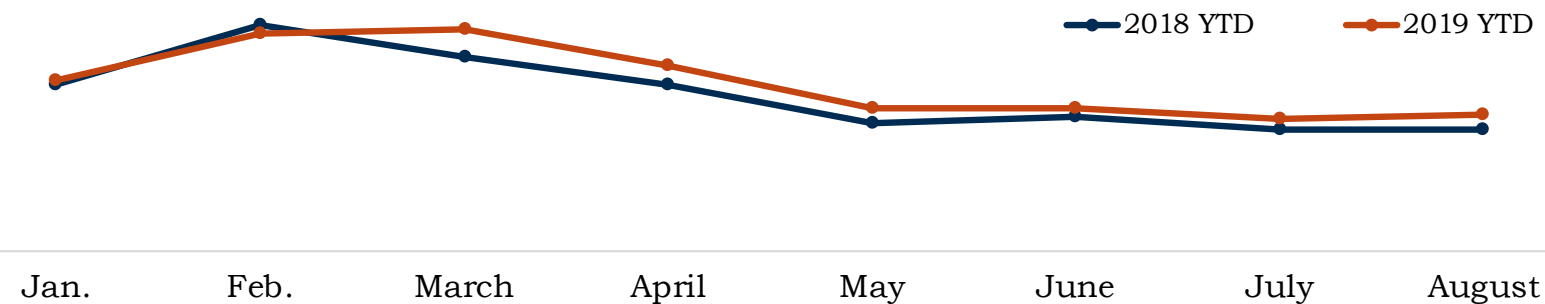
Yuma County



Occupancy
YTD Change = 4.0%



ADR
YTD Change = 3.2%



RevPAR
YTD Change = 7.3%



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](#)

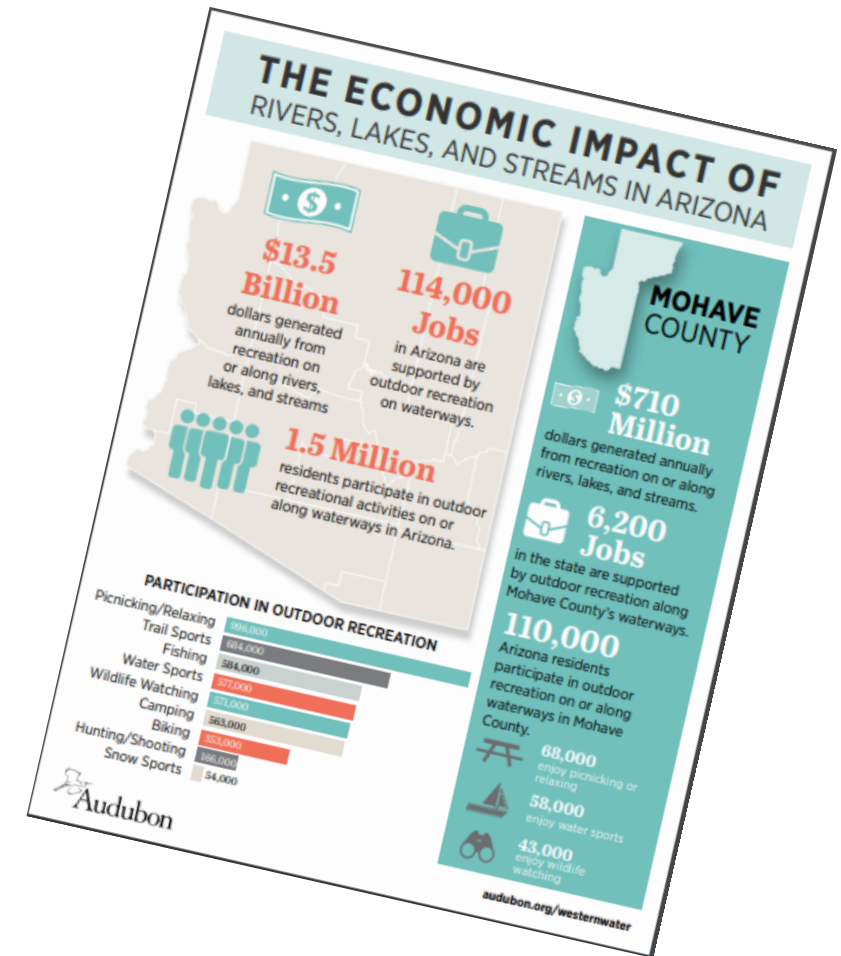
[Graham County: 2006-2018](#)

[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](#)

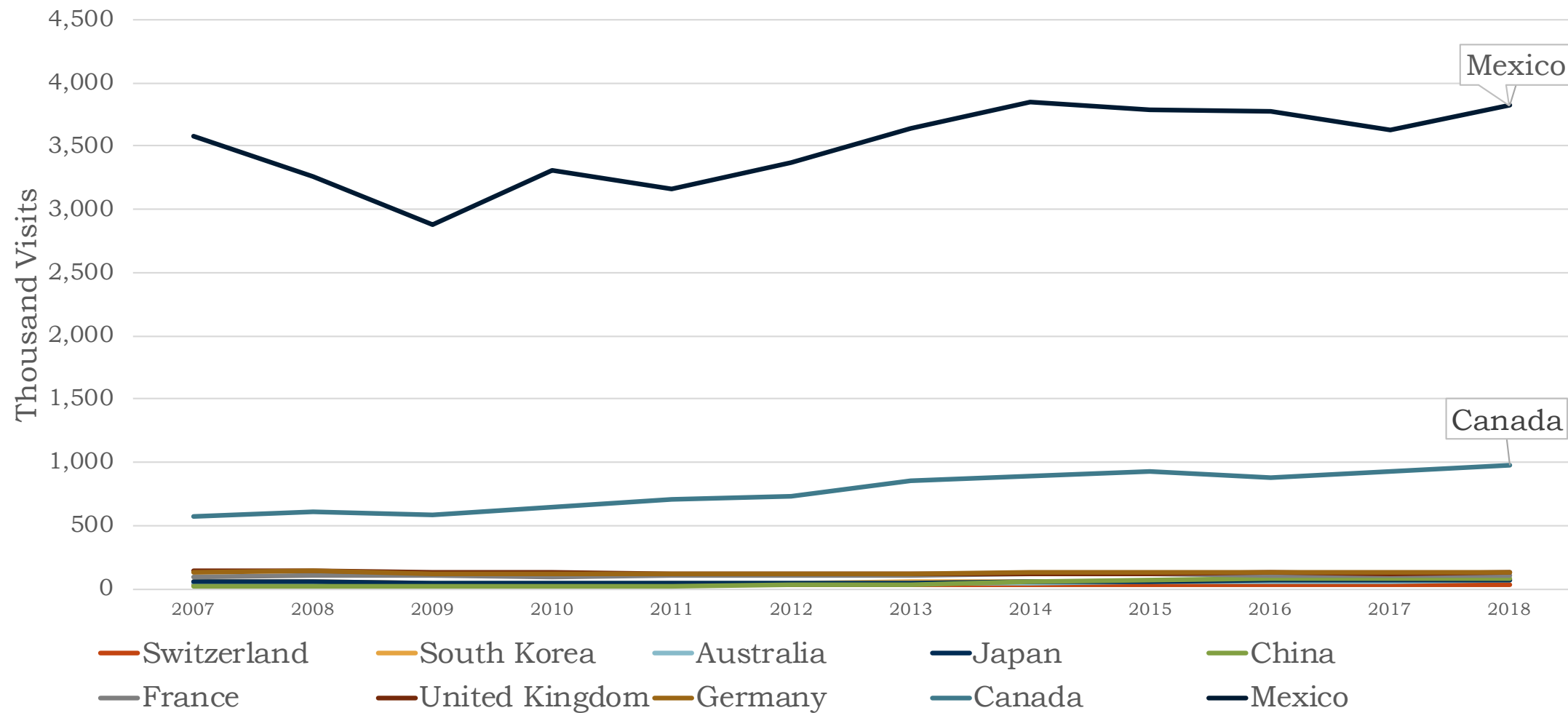
“In 2018, 7.6 million visitors spent an estimated \$336 million in local gateway regions while visiting Lake Mead National Recreation Area.”



International Visitation

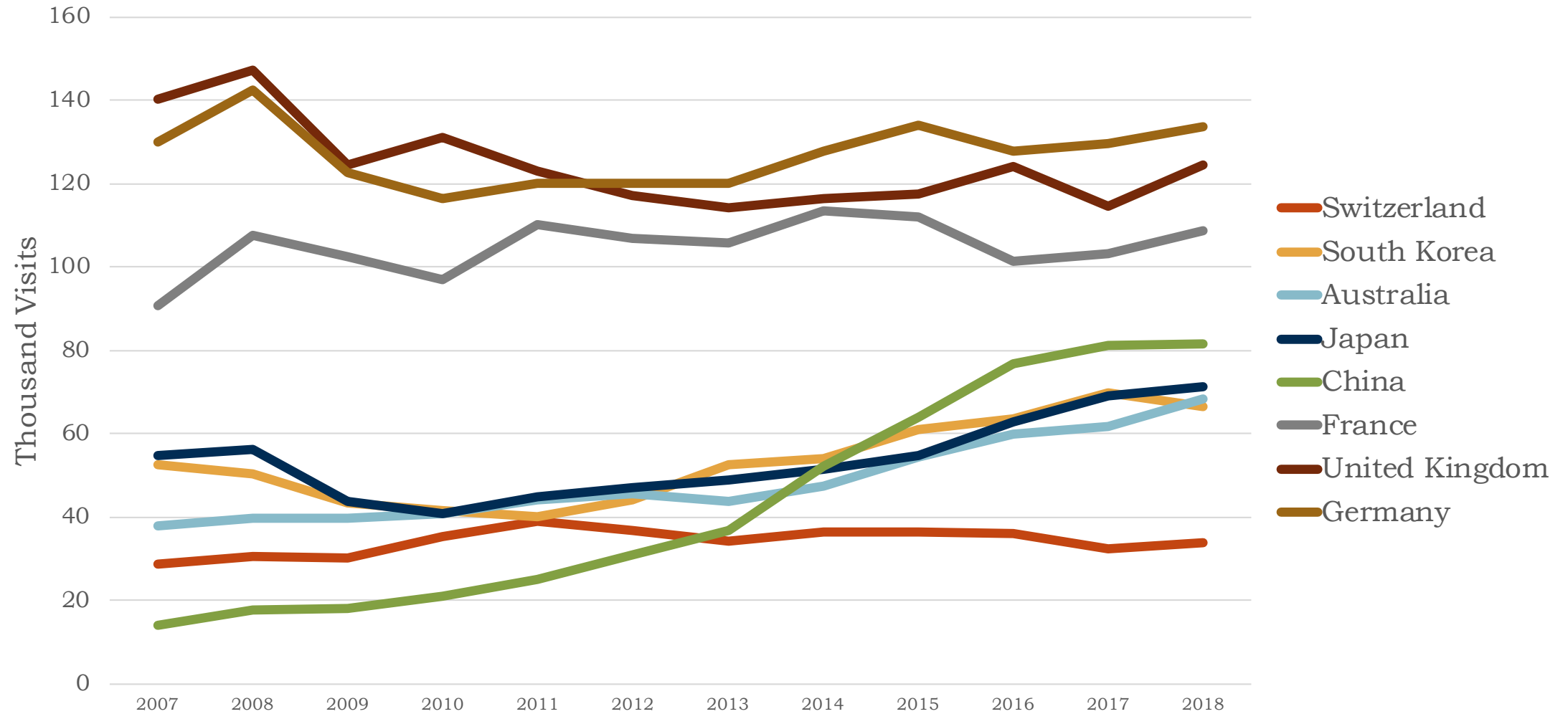


Visitation to Arizona





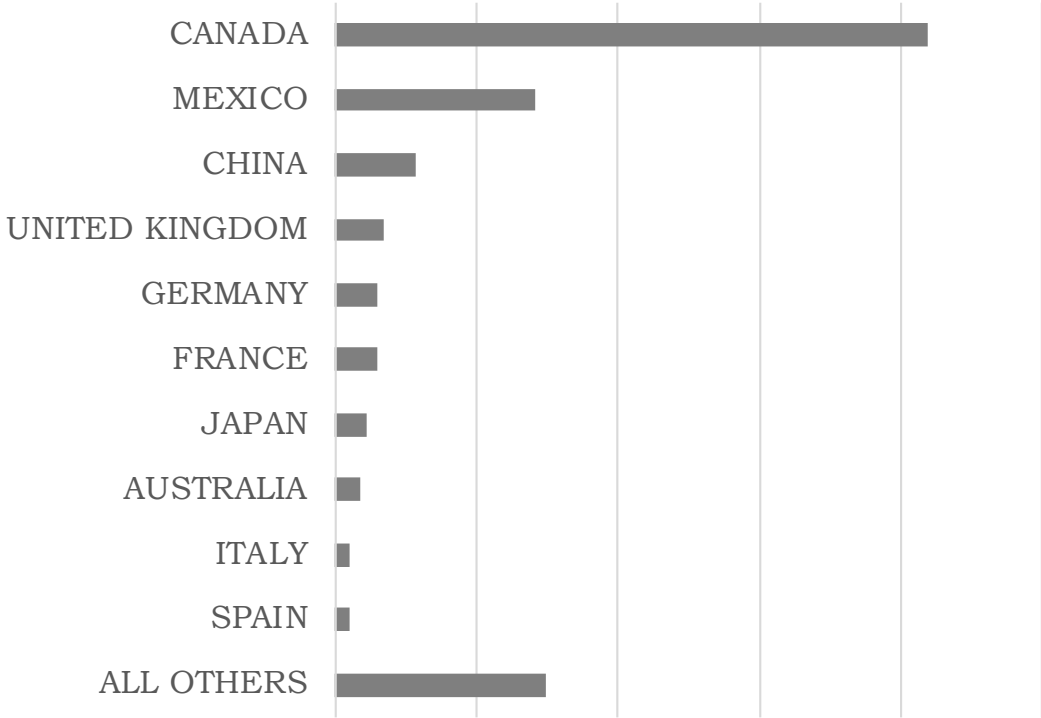
Visitation to Arizona Trend



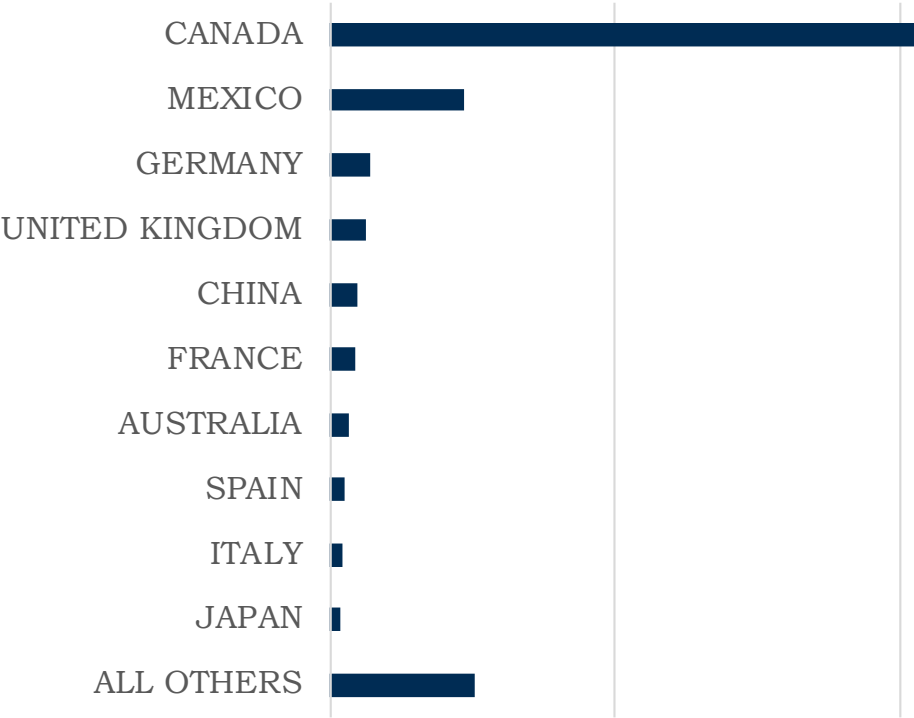


Visa Card Spending Volume

Arizona



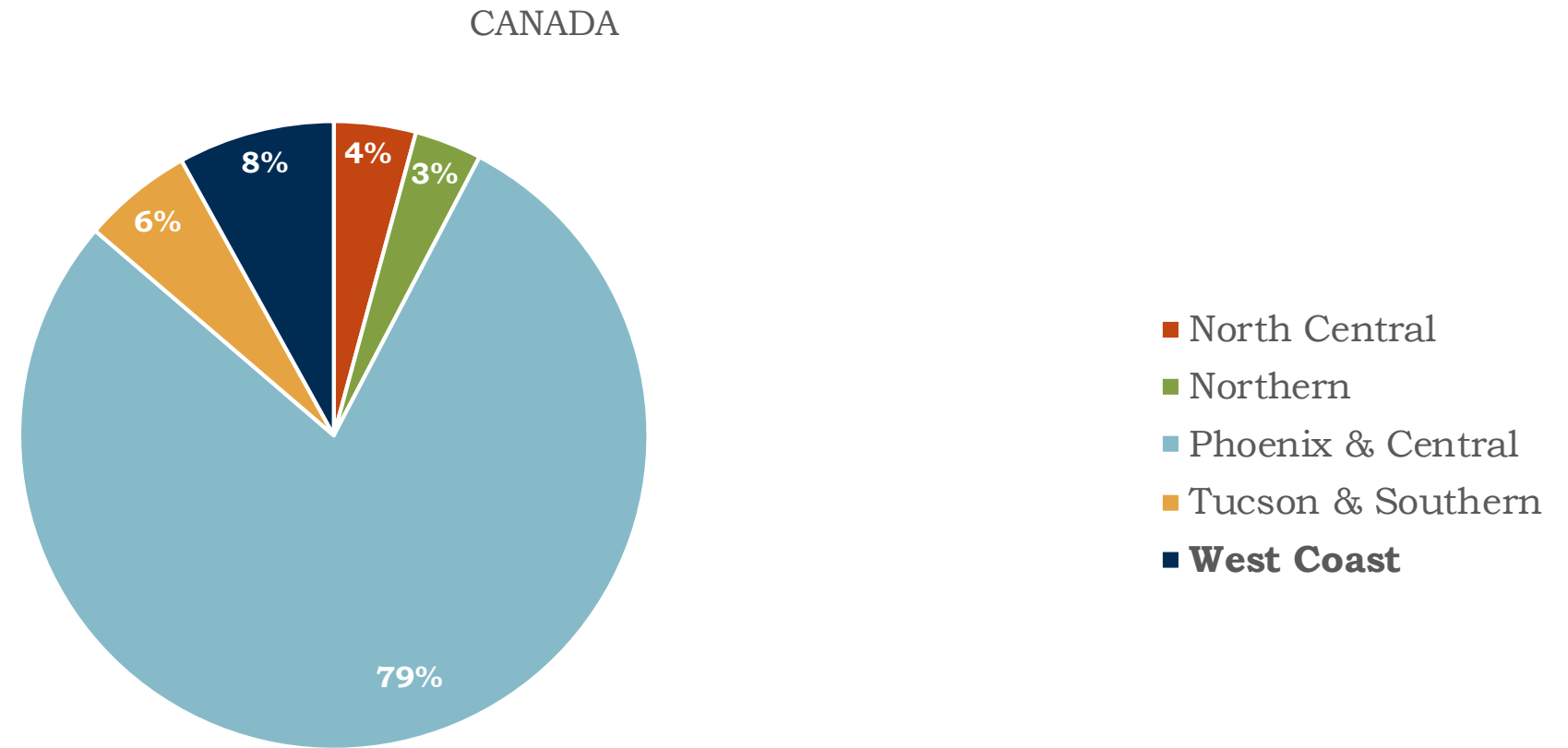
West Coast Region



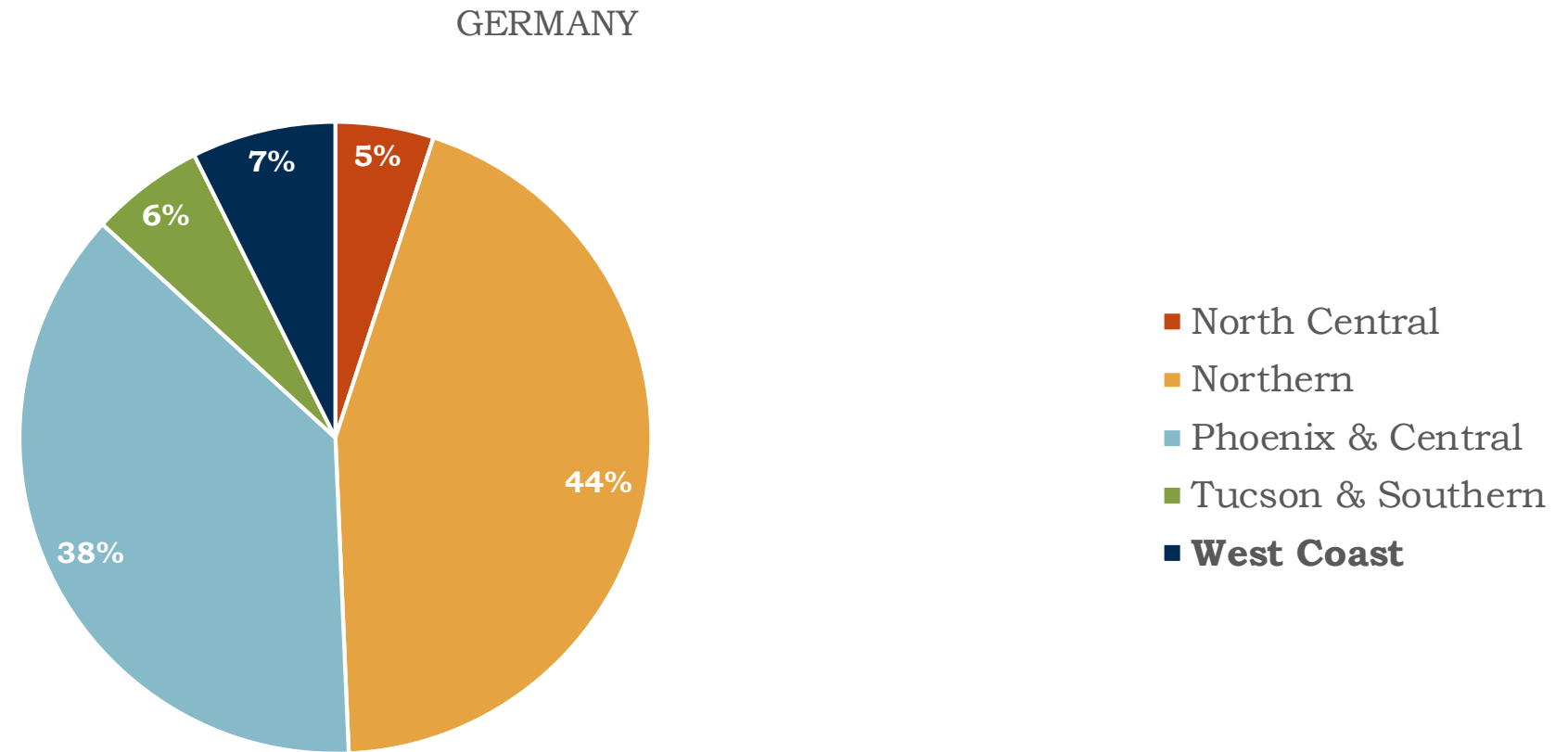
Source: VisaVue Travel, 2018



Where do visitors spend the most?



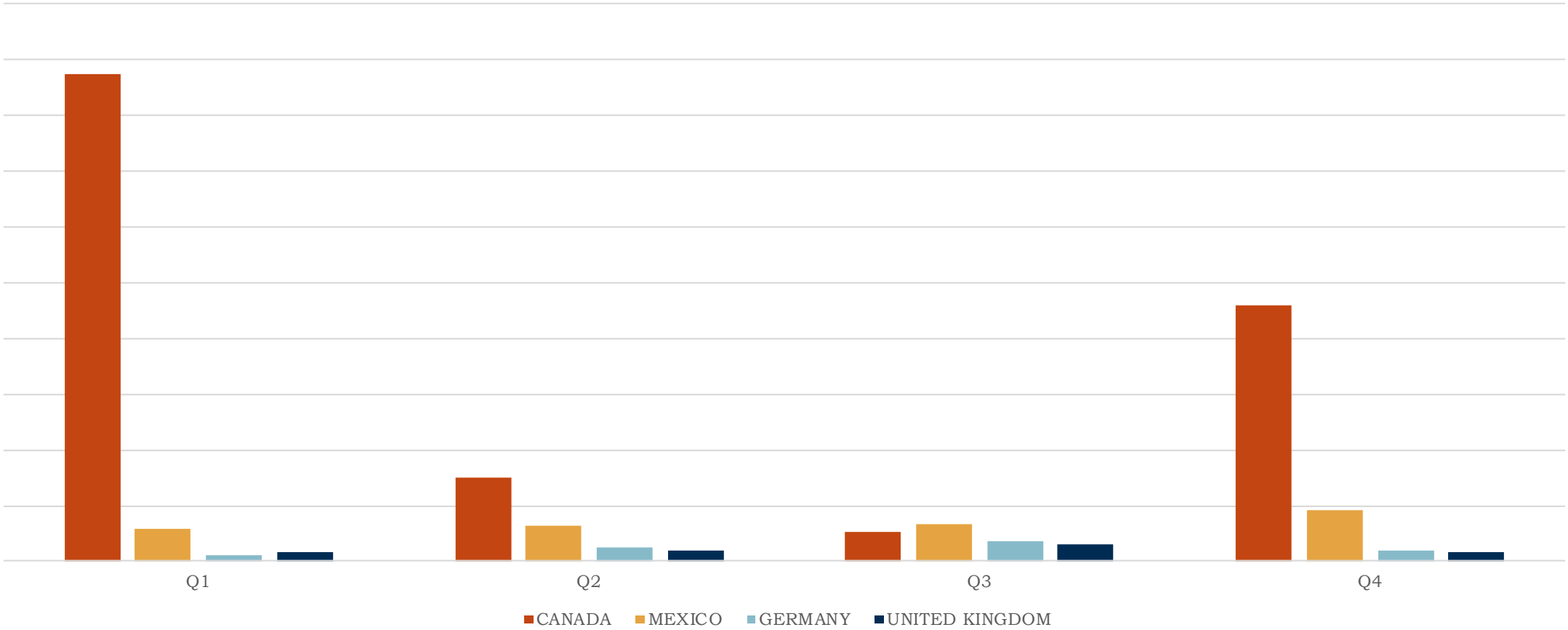
Where do visitors spend the most?





Seasonal Spending

West Coast Region

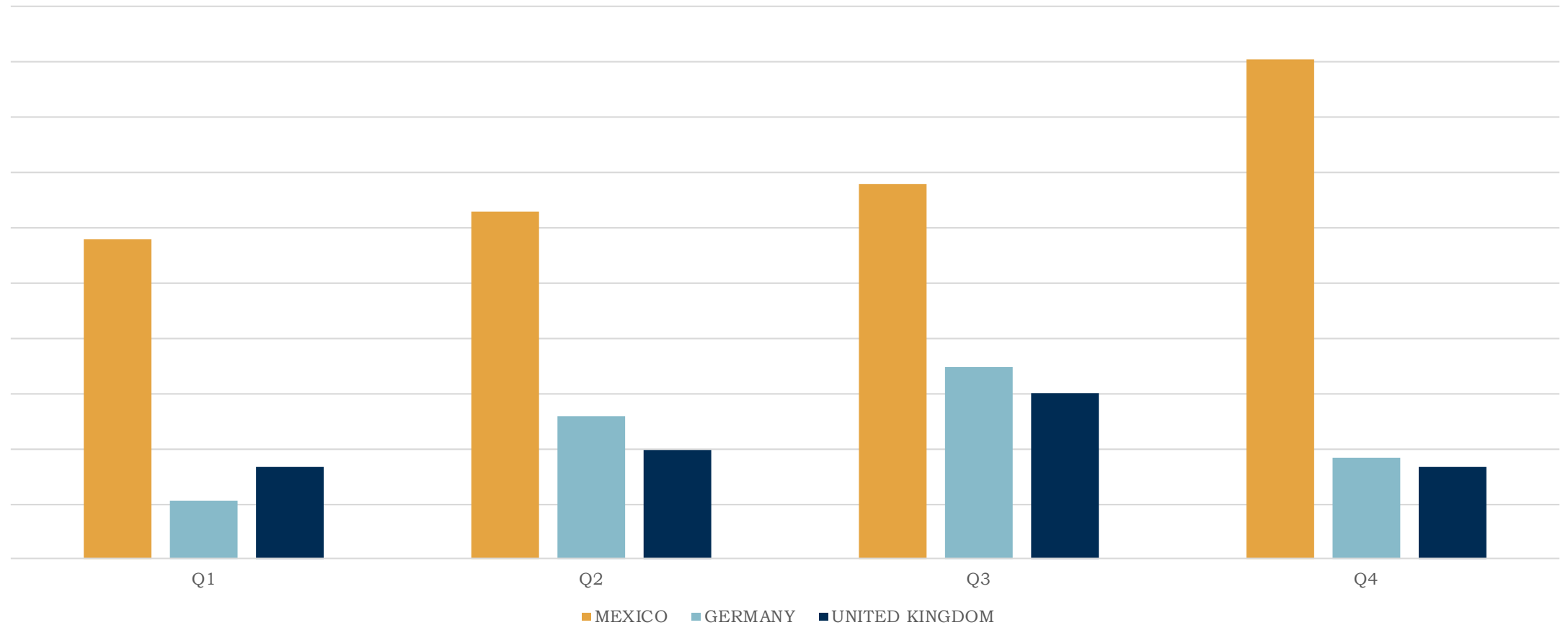


Source: VisaVue Travel, 2018



Seasonal Spending

West Coast Region



Source: VisaVue Travel, 2018



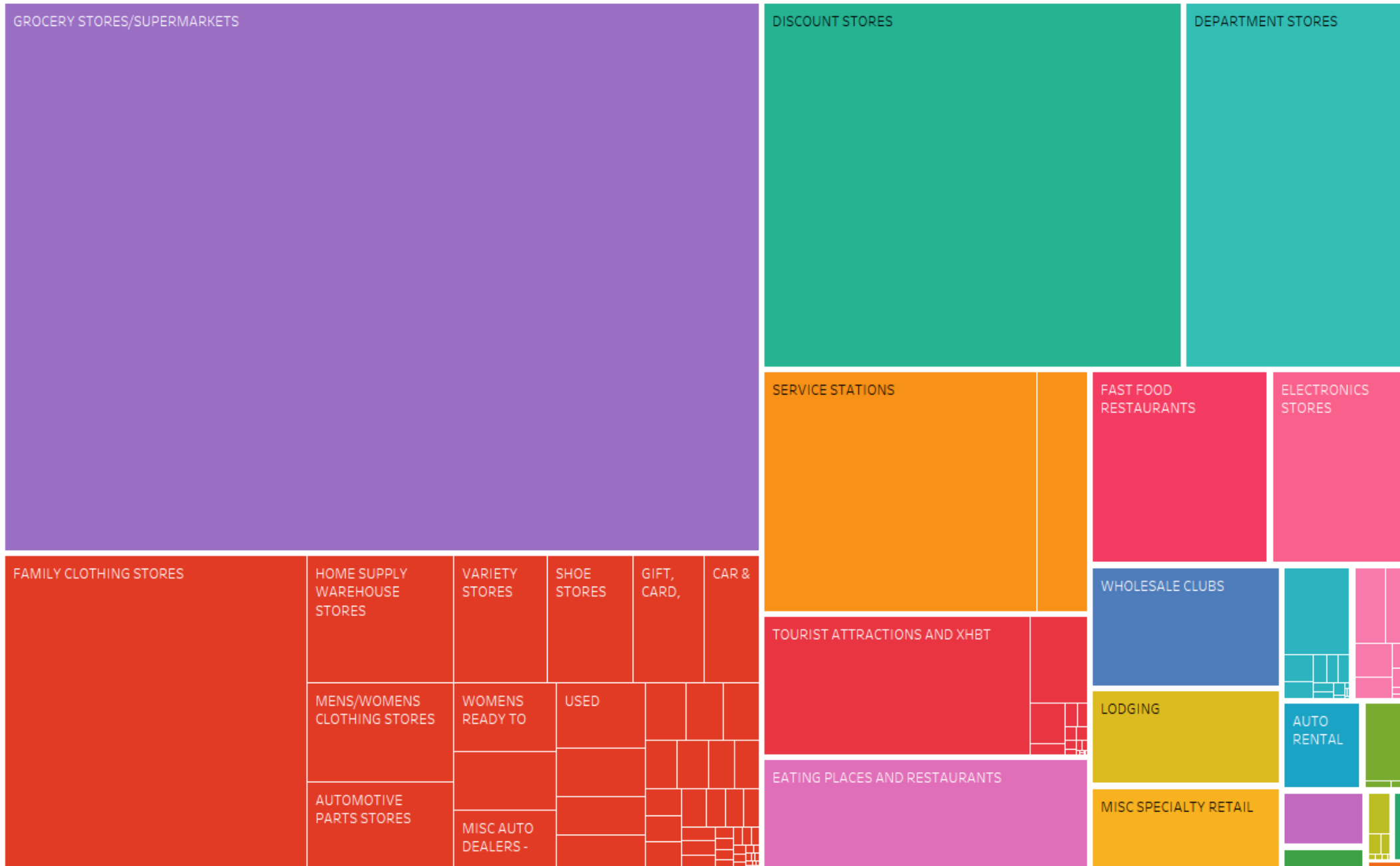
Canada





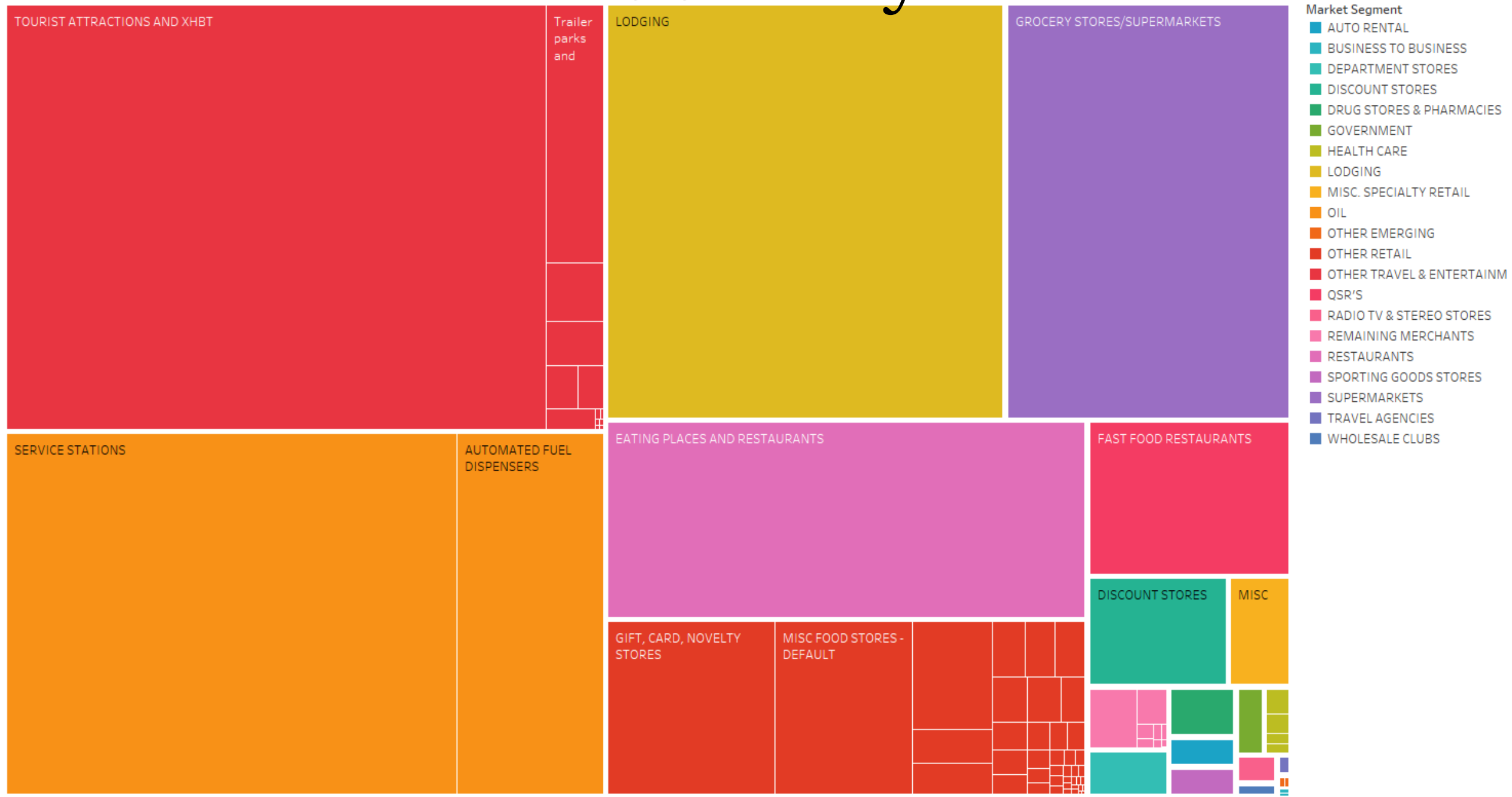
Mexico

- Market Segment
- AUTO RENTAL
 - BUSINESS TO BUSINESS
 - DEPARTMENT STORES
 - DISCOUNT STORES
 - DRUG STORES & PHARMACIES
 - FURNITURE/EQUIP. STORES
 - GOVERNMENT
 - HEALTH CARE
 - LODGING
 - MISC. SPECIALTY RETAIL
 - OIL
 - OTHER EMERGING
 - OTHER RETAIL
 - OTHER TRAVEL & ENTERTAINM
 - QSR'S
 - RADIO TV & STEREO STORES
 - REMAINING MERCHANTS
 - RESTAURANTS
 - SPORTING GOODS STORES
 - SUPERMARKETS
 - WHOLESALE CLUBS





Germany

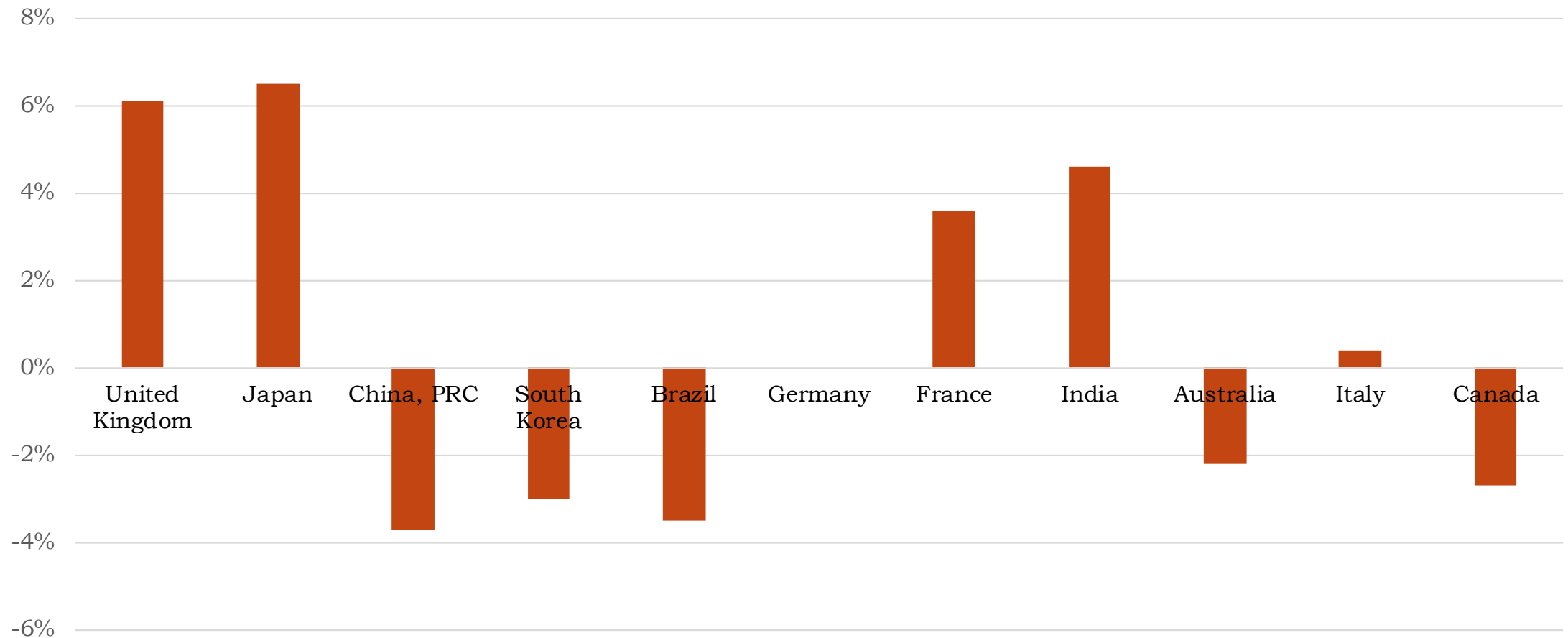




2019 International Visitor Trends

Arrivals to the U.S.

% Change YTD July 2019*

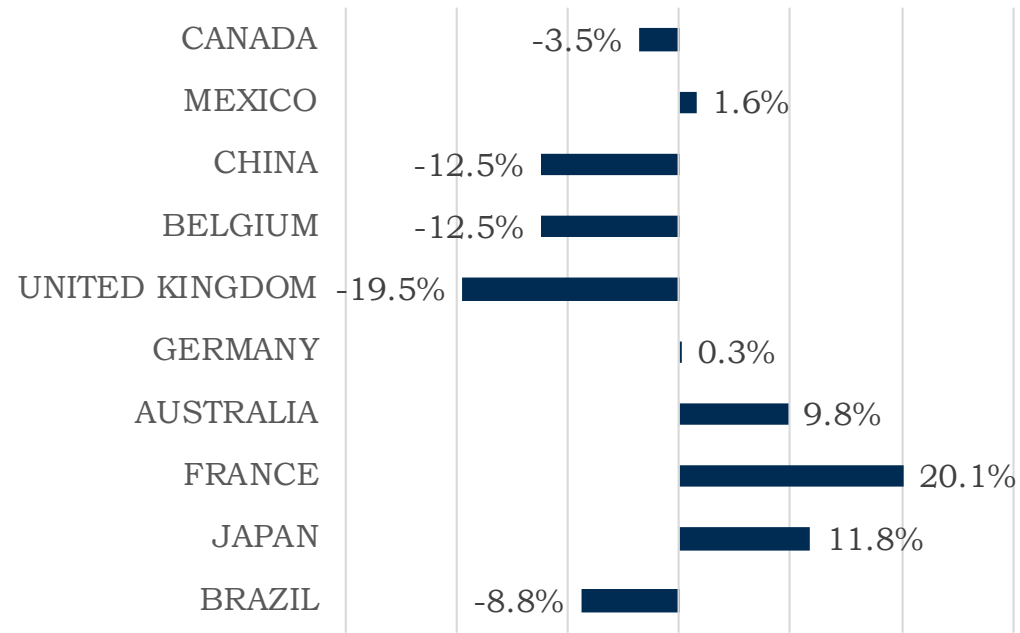


Source: National Travel and Tourism Office *Canada arrivals are YTD June 2019

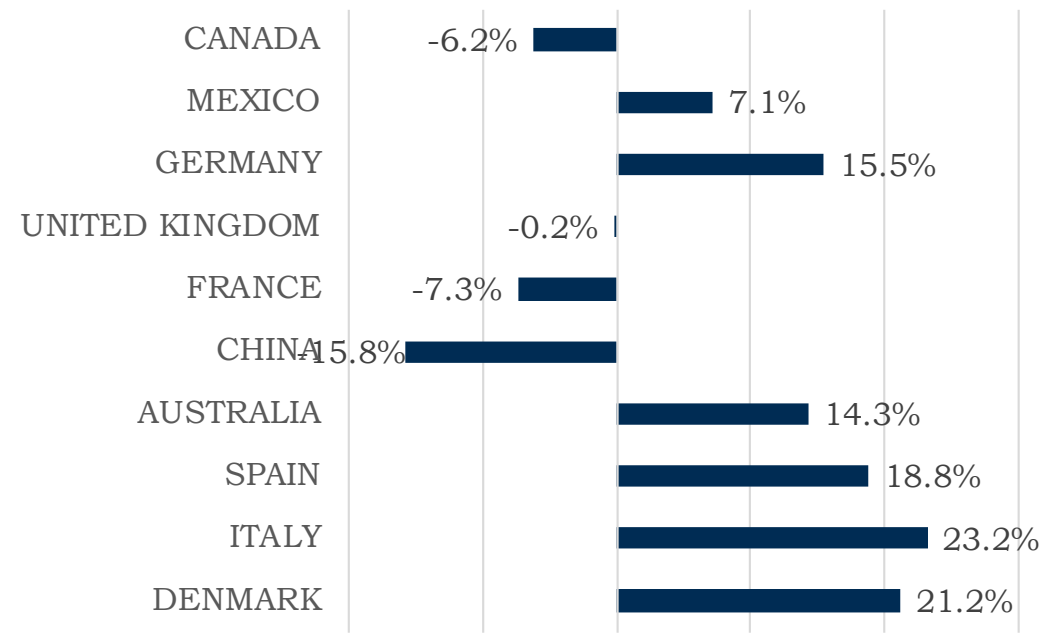
International Visa Card Spending

West Coast Region

Q1 2019 (January-March)



Q2 2019 (April-June)





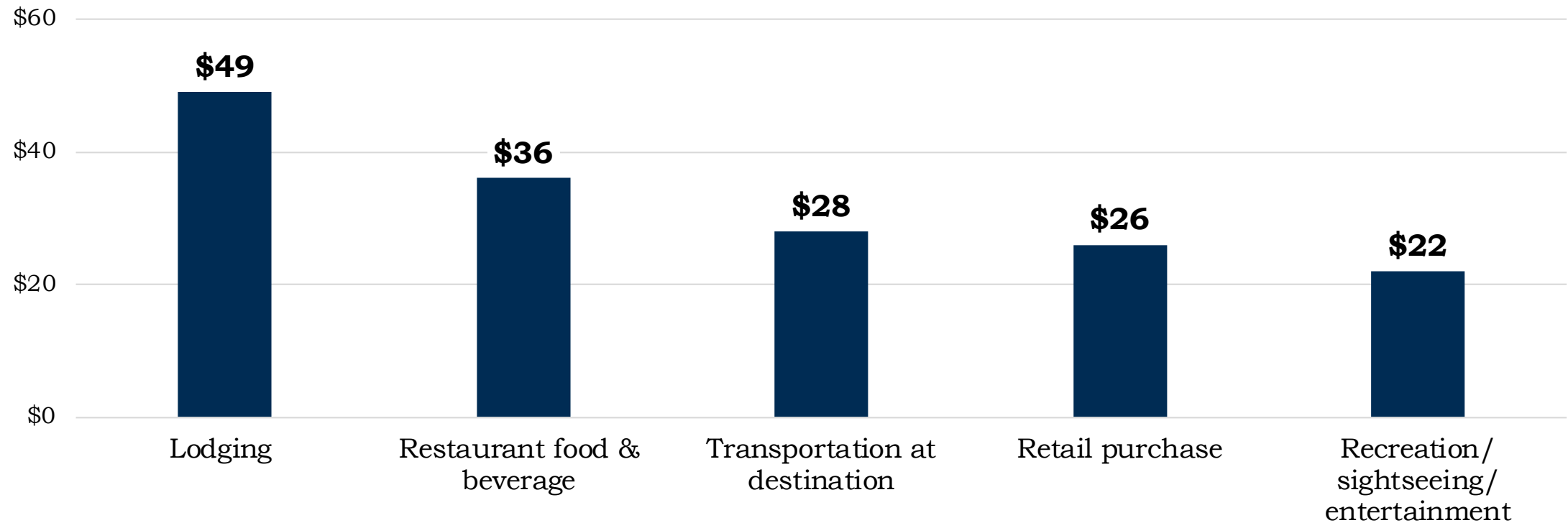
Domestic Overnight Visitor Expenditures 2018

West Coast Region



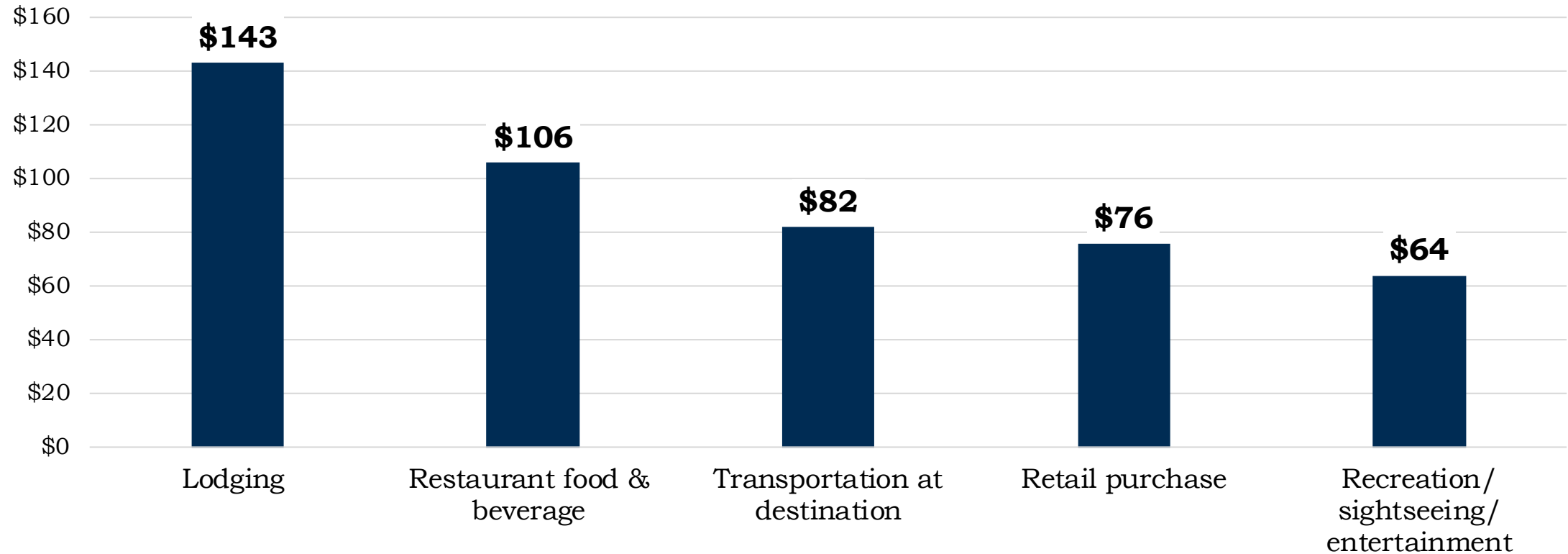
Average Per-Person Expenditures on Domestic Overnight Trips

Average Per Person \$161



Average Per-Party Expenditures on Domestic Overnight Trips

Average Per Party \$471





Domestic Overnight Visitor Profile 2018

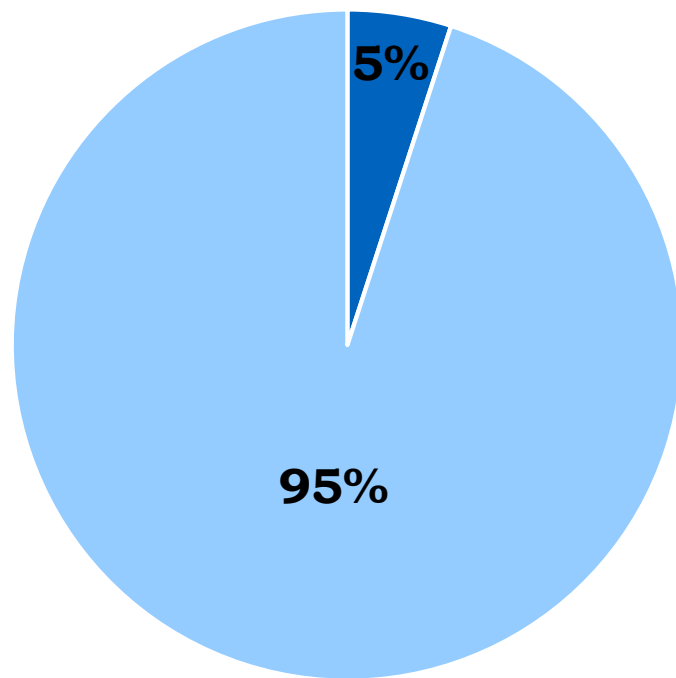
West Coast Region



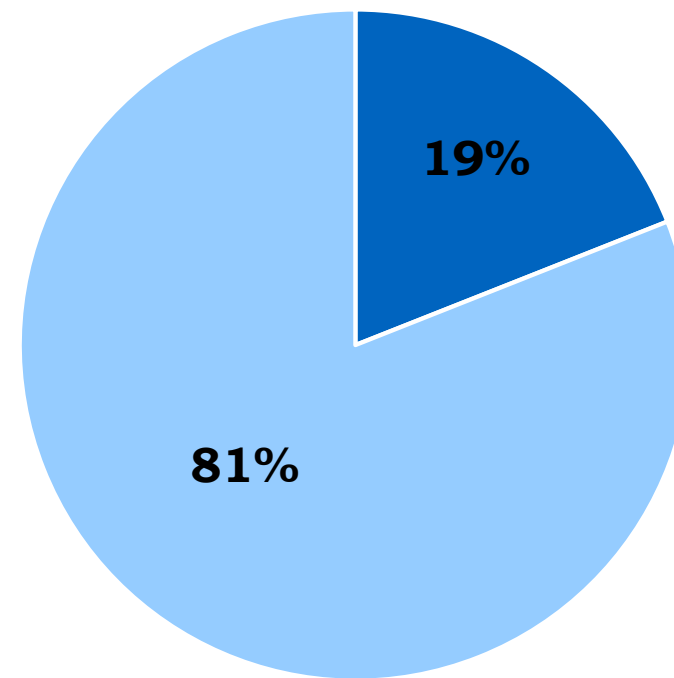


2018 Regional Domestic Visitor Profile

West Coast Region



■ Business ■ Leisure

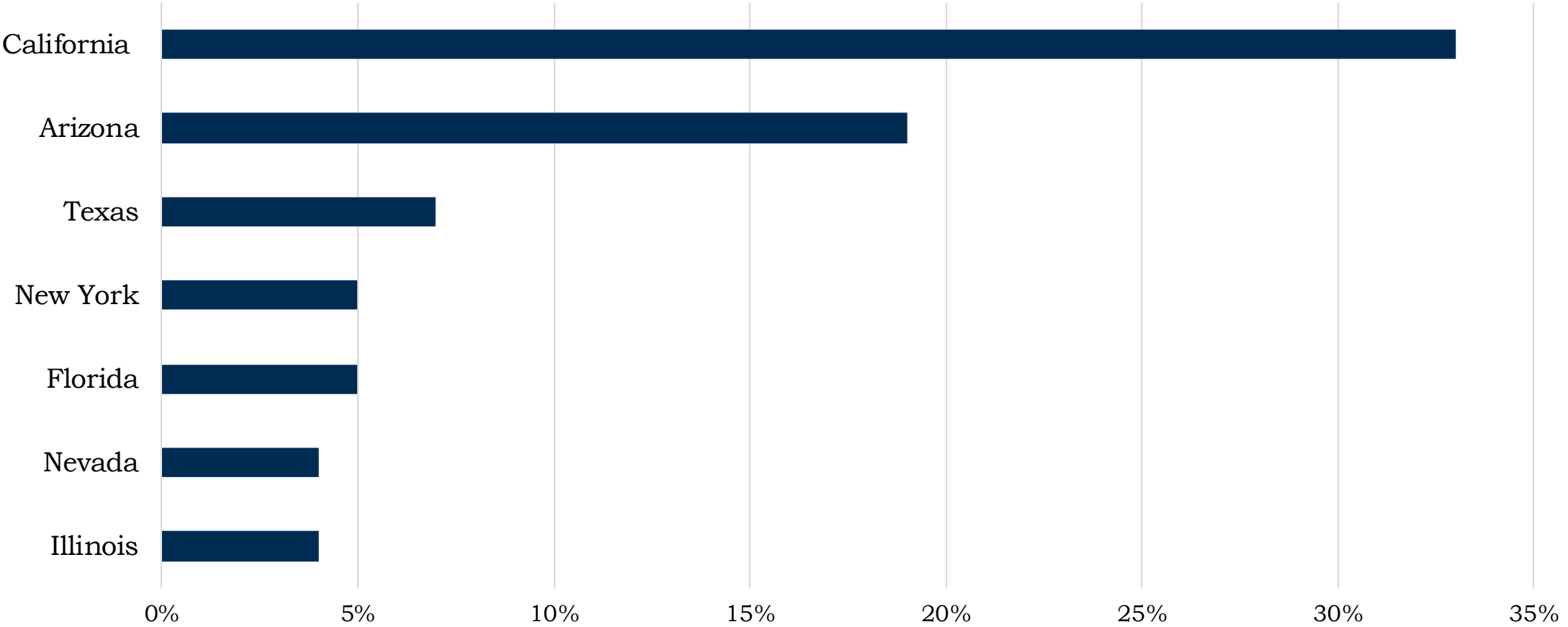


■ AZ Residents ■ Non-Residents



State Origin of Overnight Trips

West Coast Region

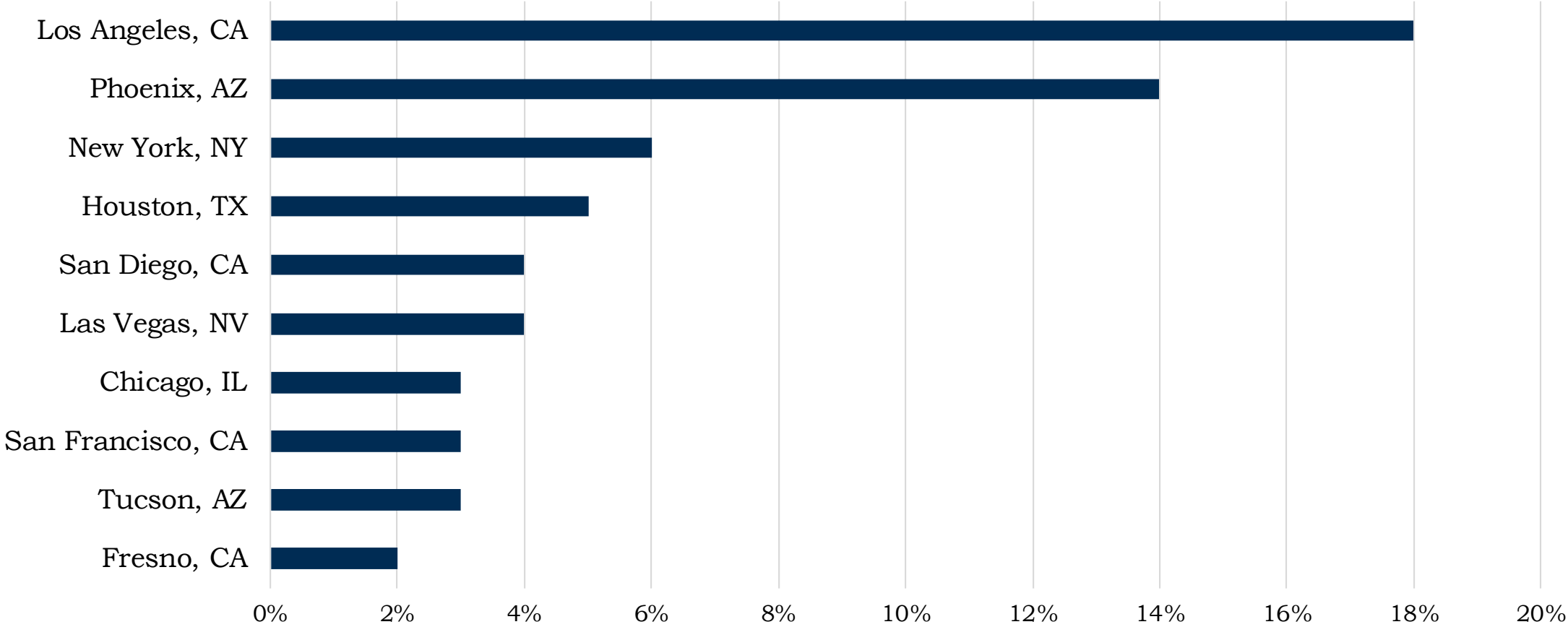


Source: Longwoods International



DMA Origin of Overnight Trip

West Coast Region

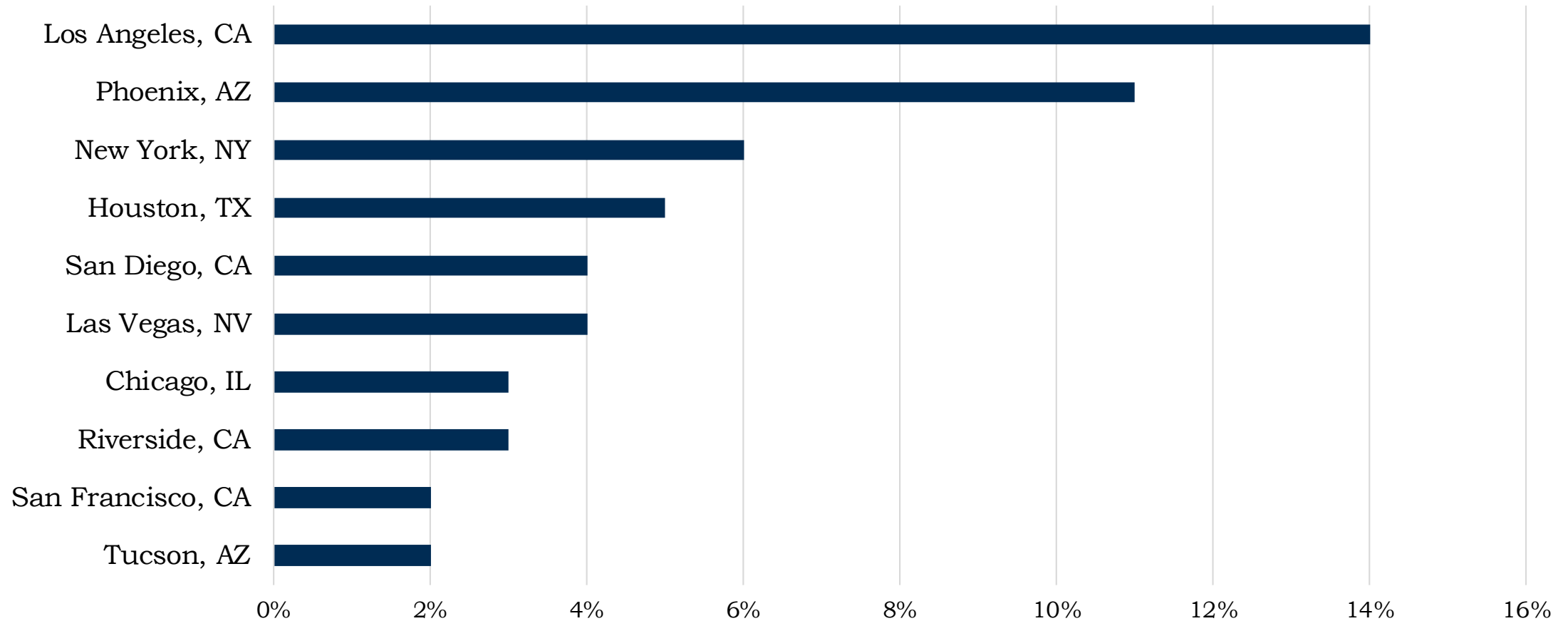


Source: Longwoods International



MSA Origin of Overnight Trip

West Coast Region

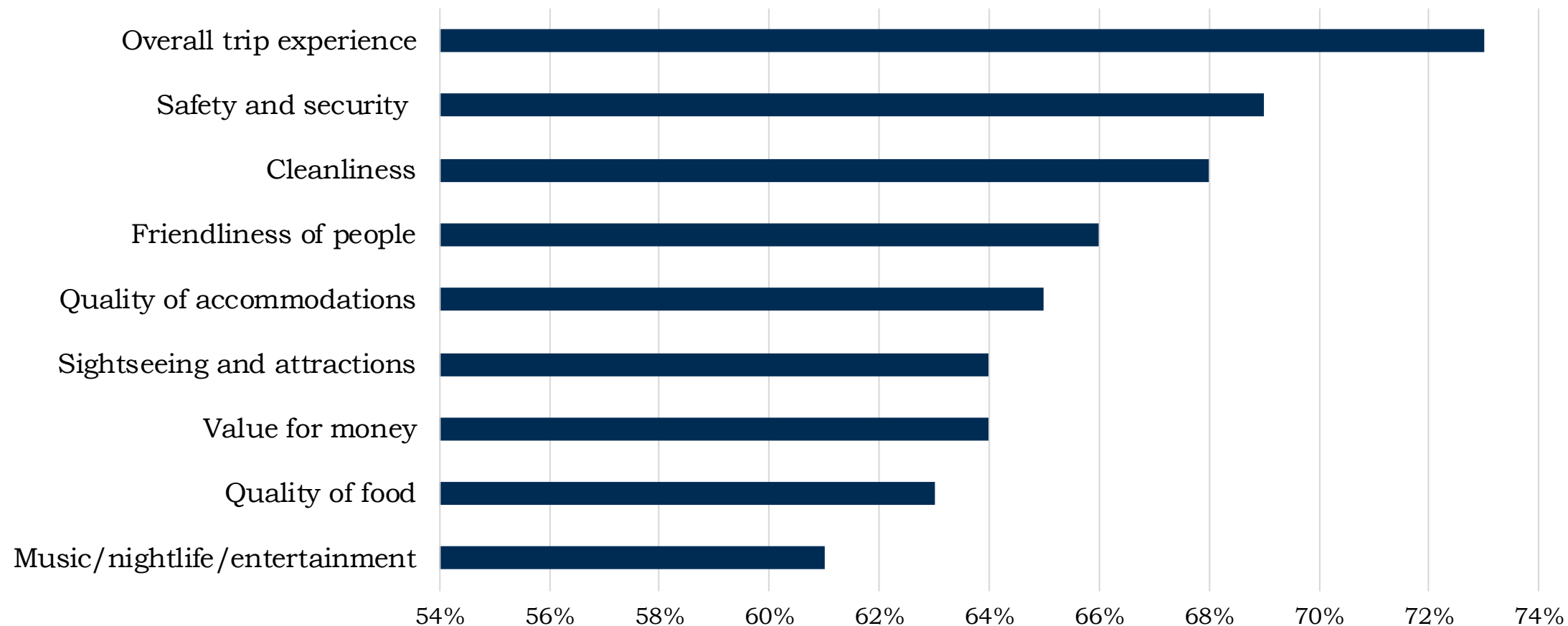


Source: Longwoods International



Satisfaction with Trip - % Very Satisfied

West Coast Region

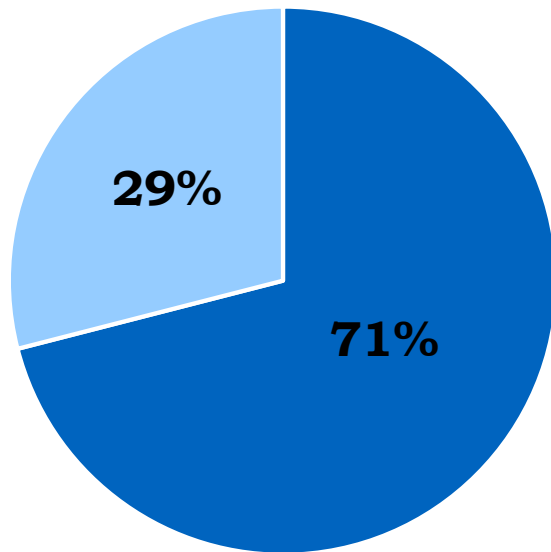




Past Visitation

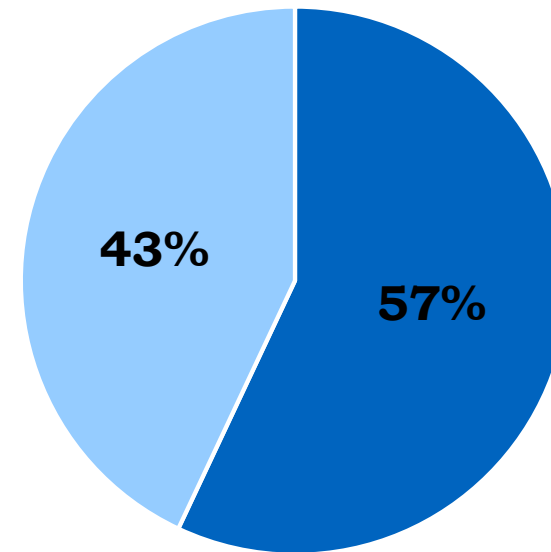
West Coast Region

Have you ever visited the Northern Region before?



■ Yes ■ No

Have you visited the Northern Region in the past 12 months?

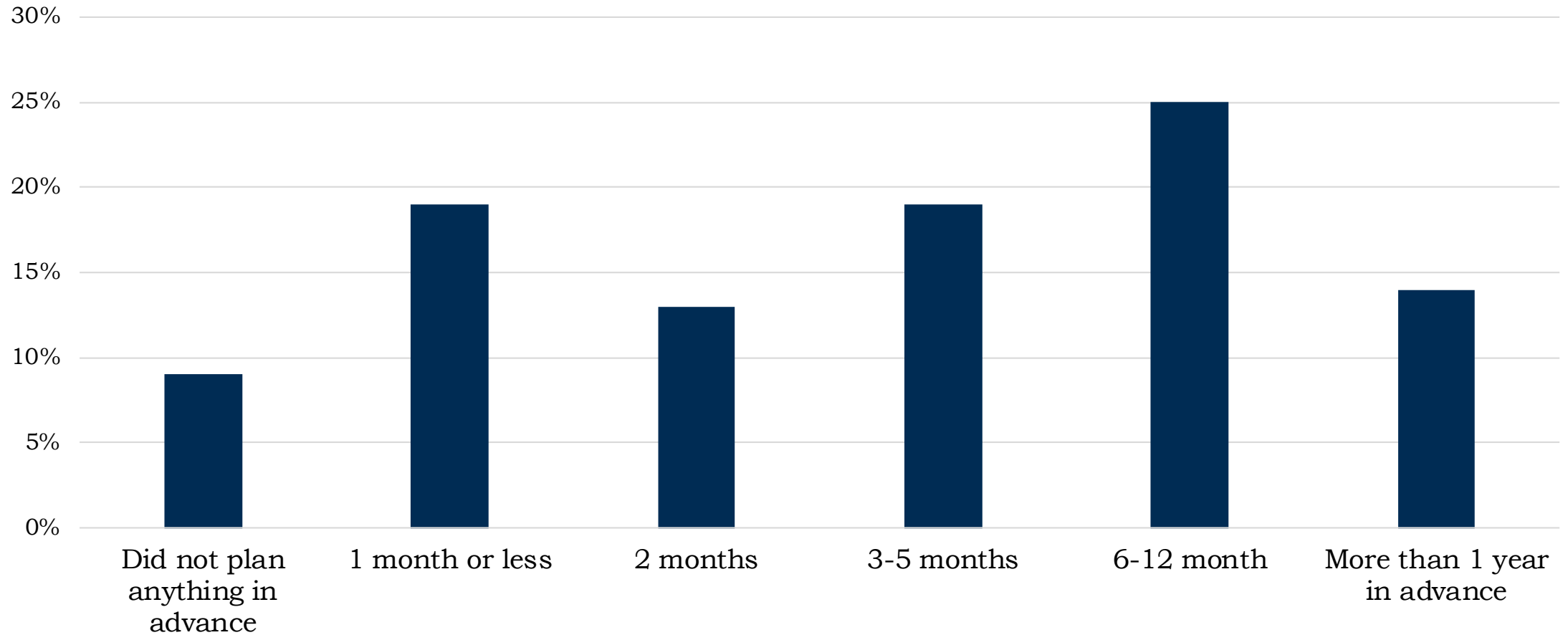


■ Yes ■ No



Length of Trip Planning

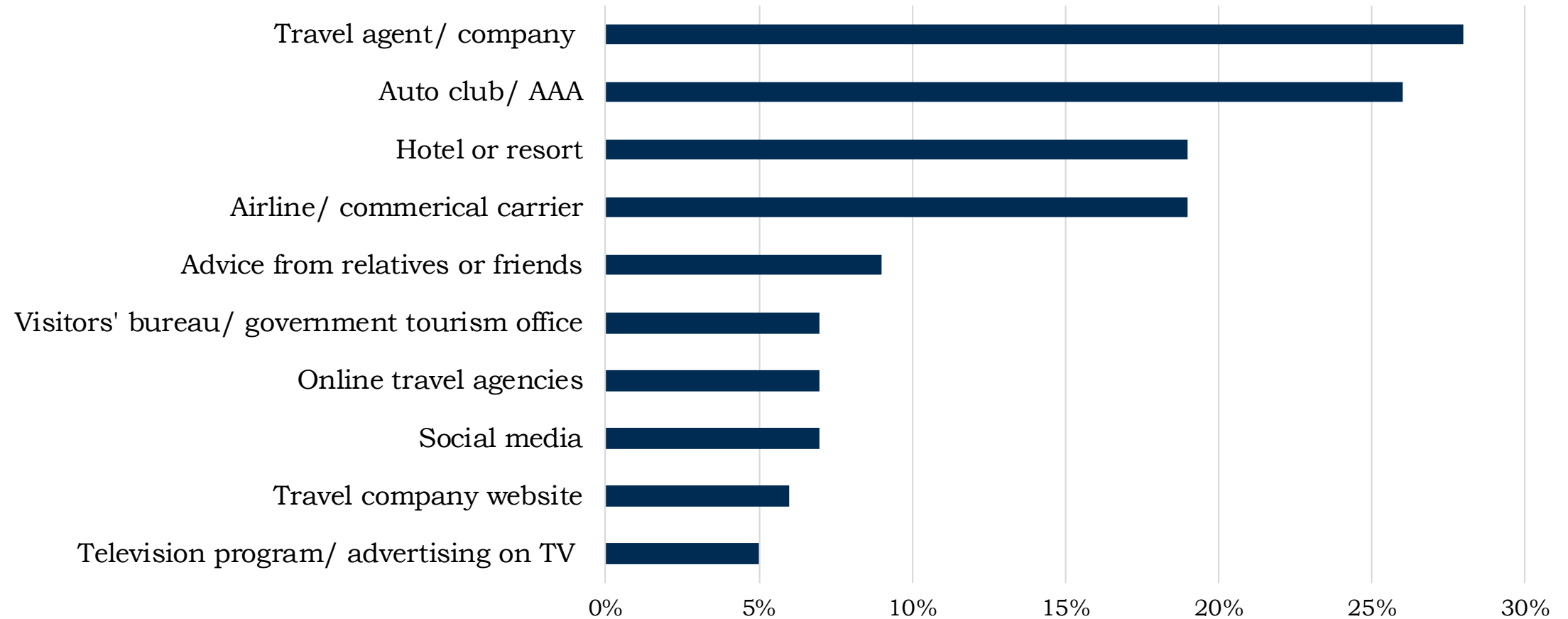
West Coast Region





Trip Planning Information Sources

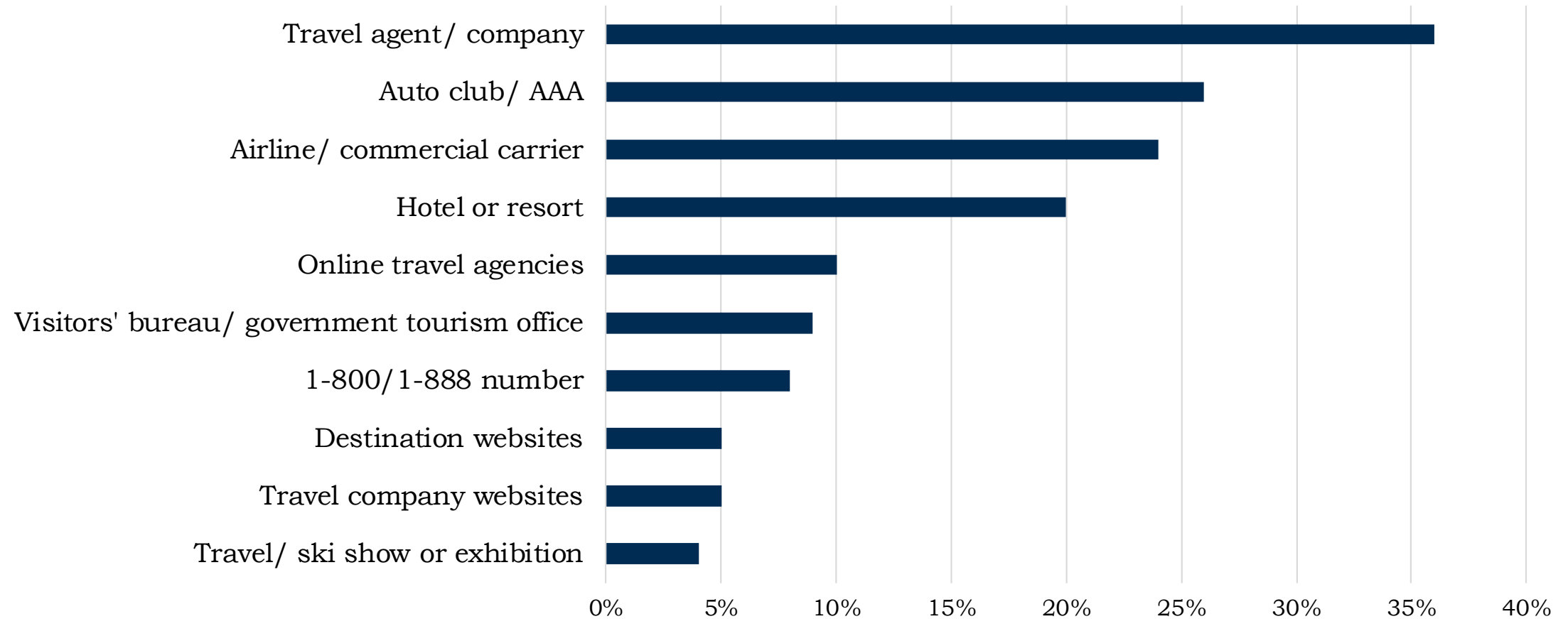
West Coast Region





Method of Booking

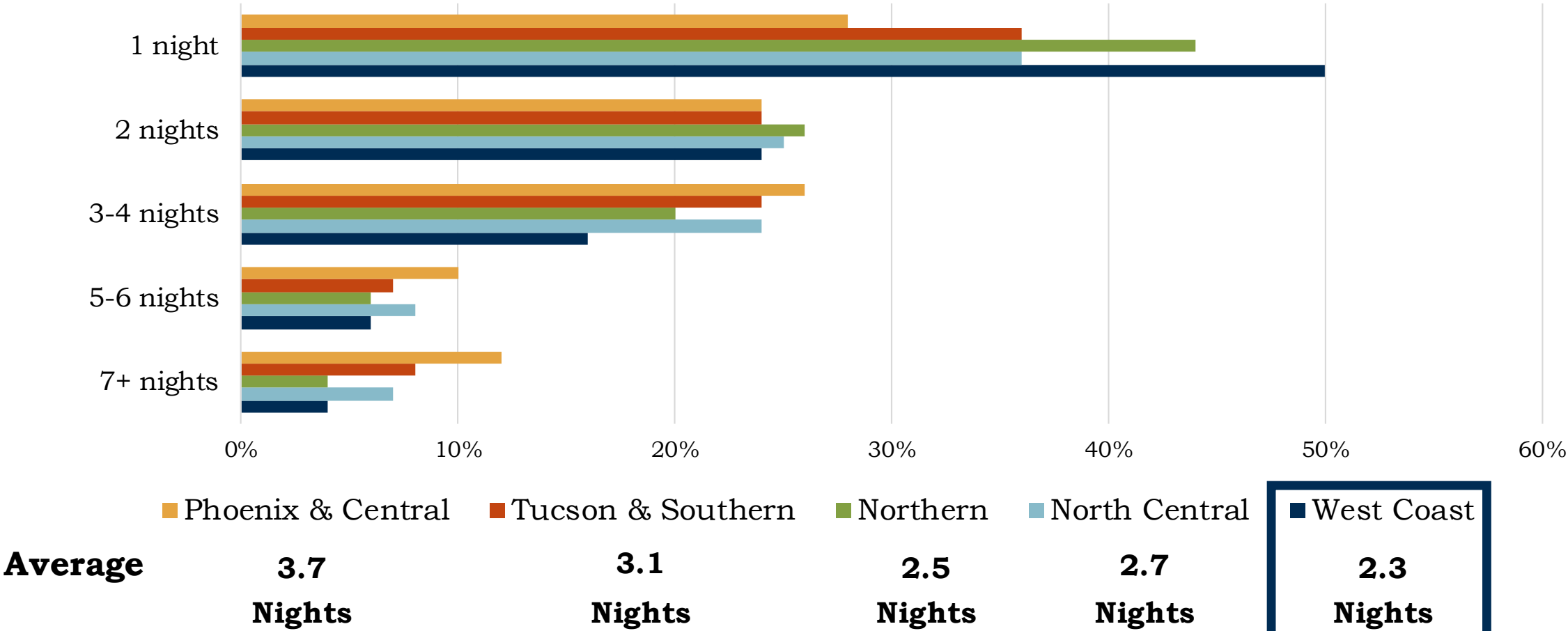
West Coast Region





Number of Nights Spent in Each Region

West Coast Region

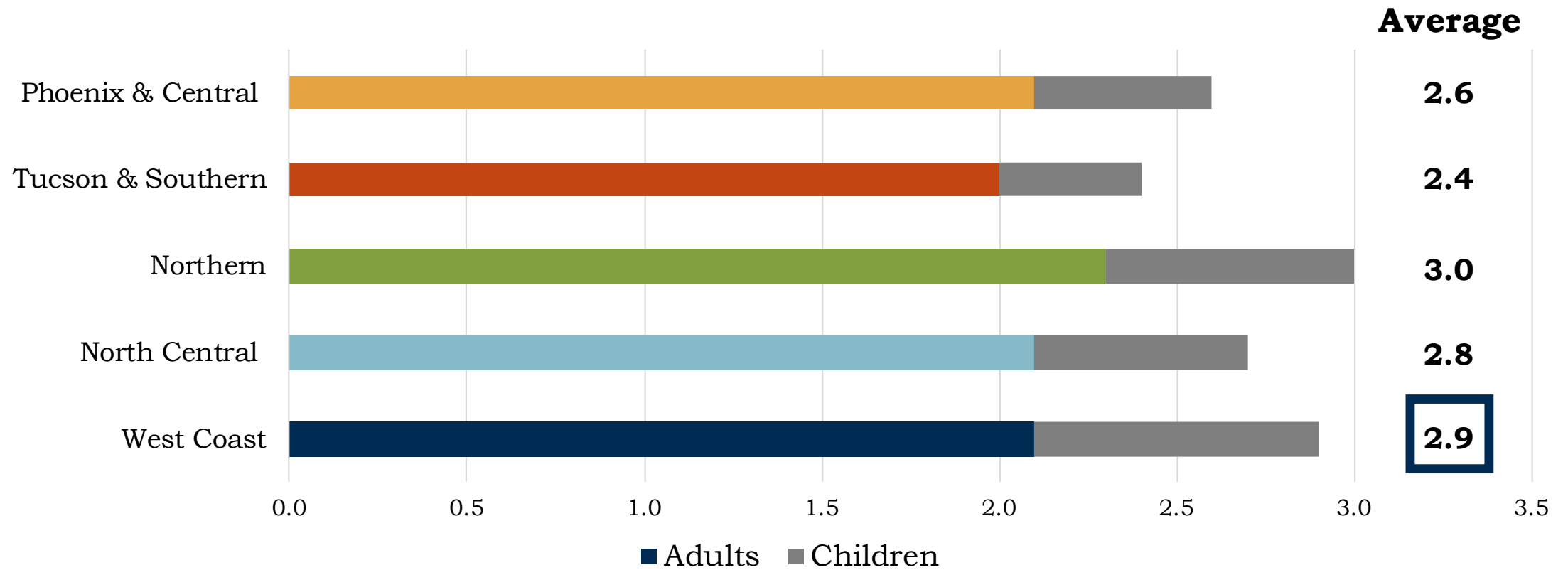


Source: Longwoods International, 2018



Size of Travel Party

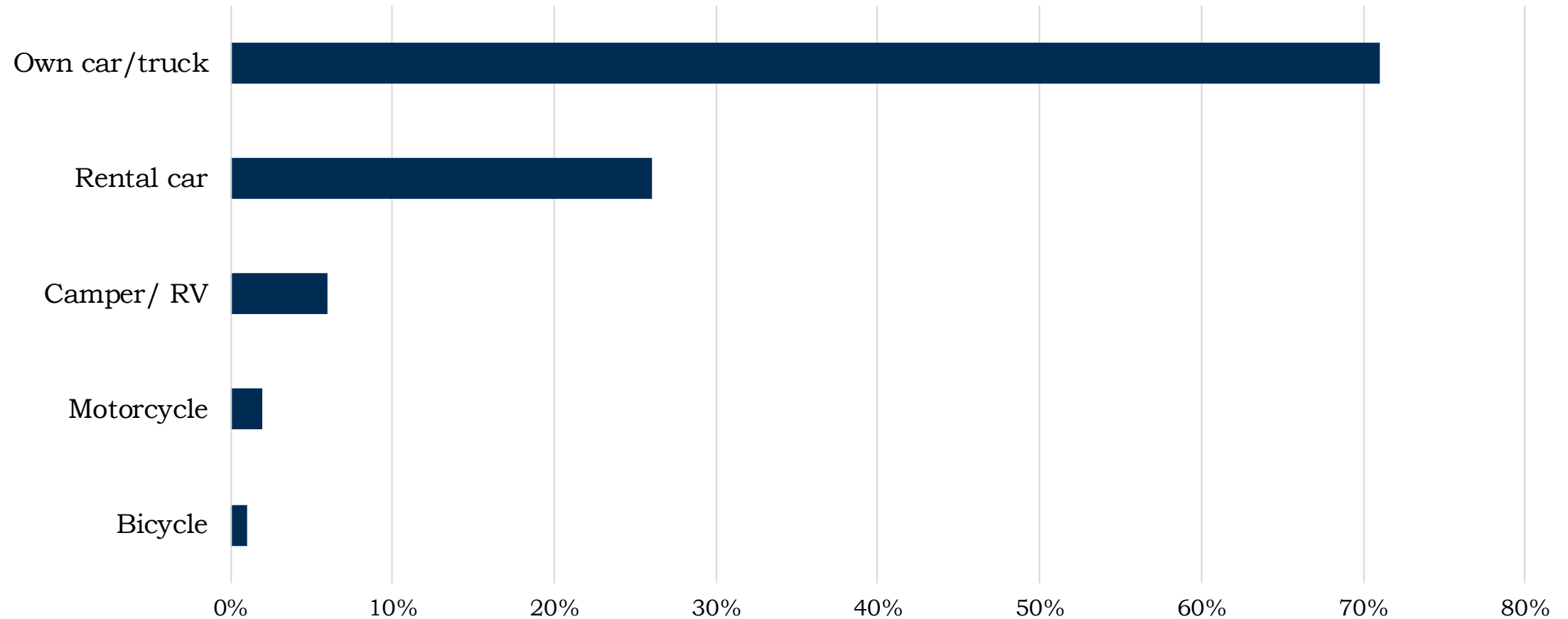
West Coast Region





Transportation – Private Vehicles

West Coast Region

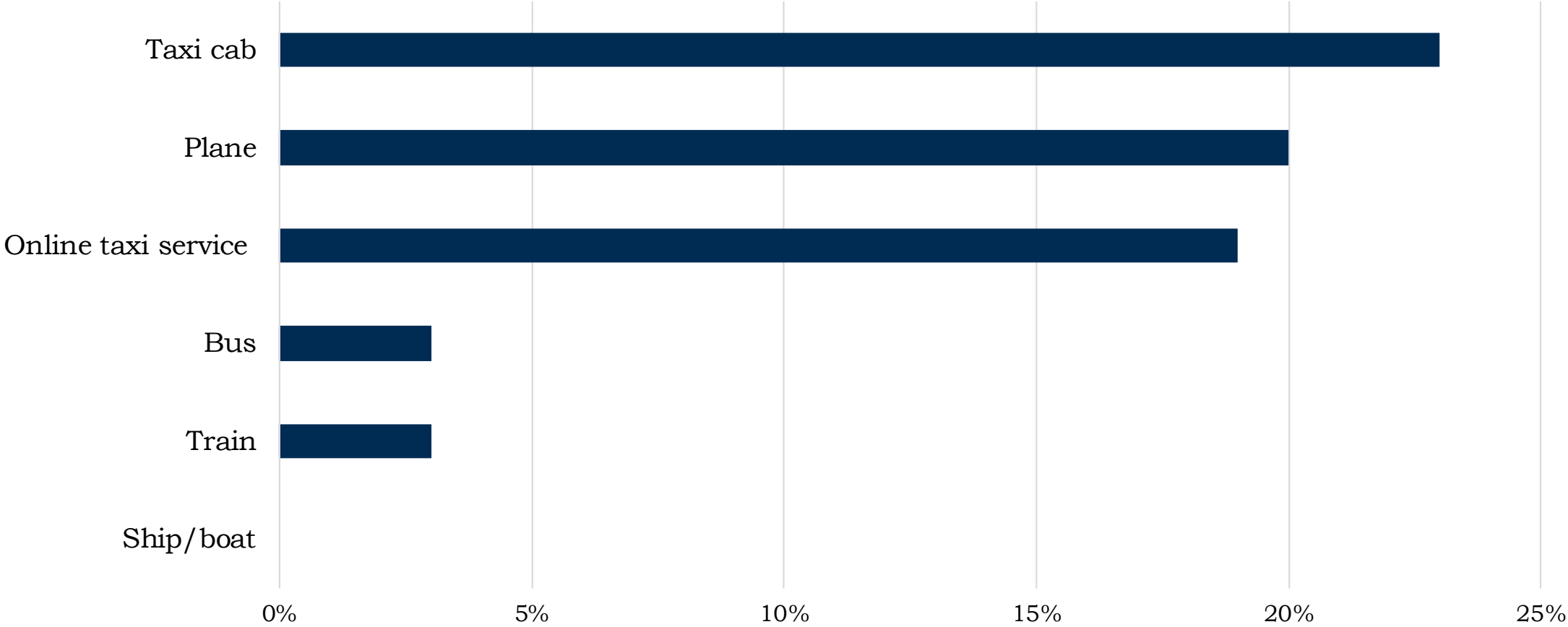


Source: Longwoods International



Transportation – Commercial Vehicles

West Coast Region

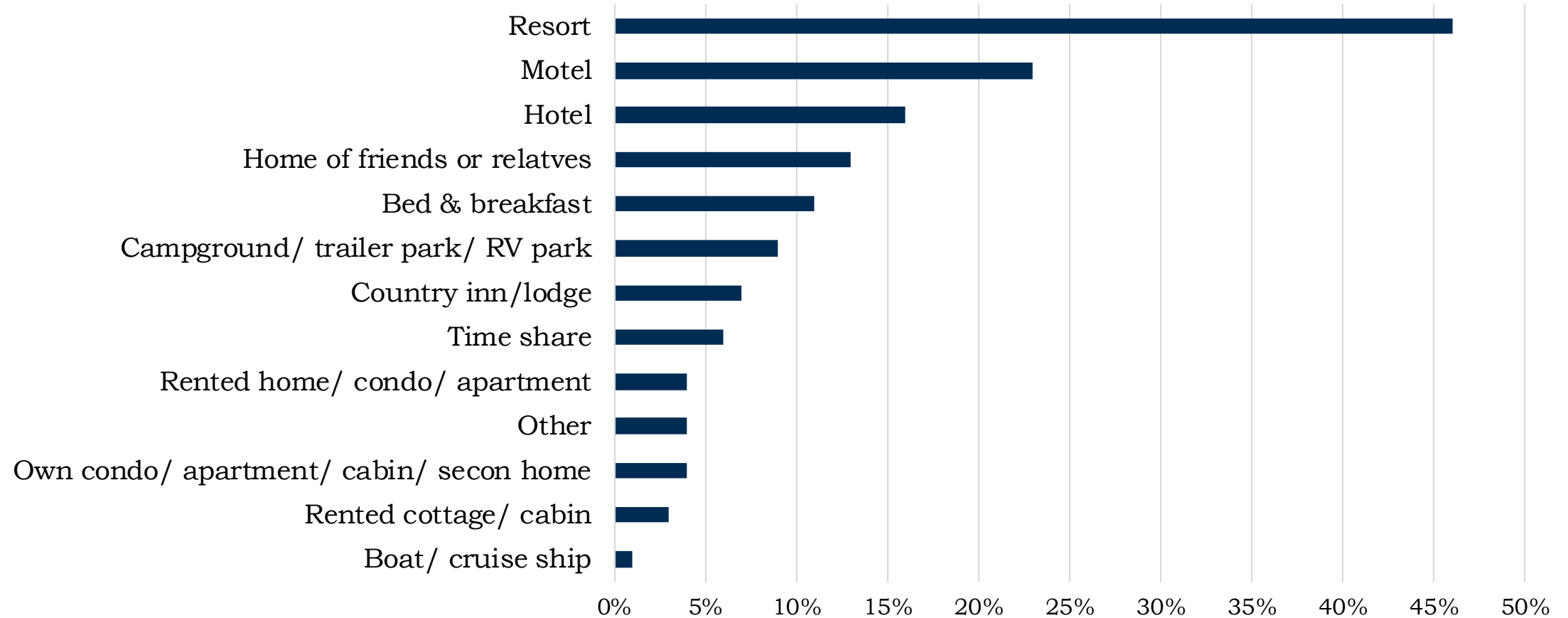


Source: Longwoods International



Accommodation

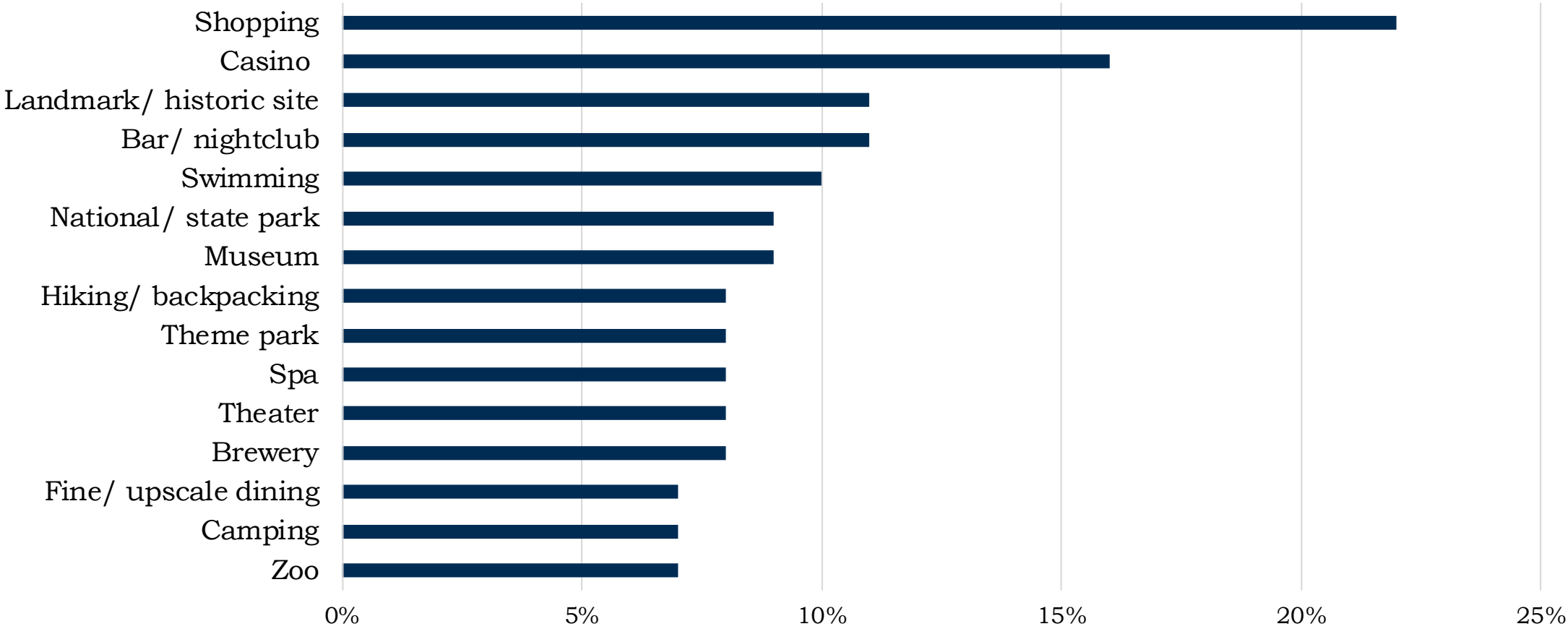
West Coast Region





Activities and Experiences

West Coast Region

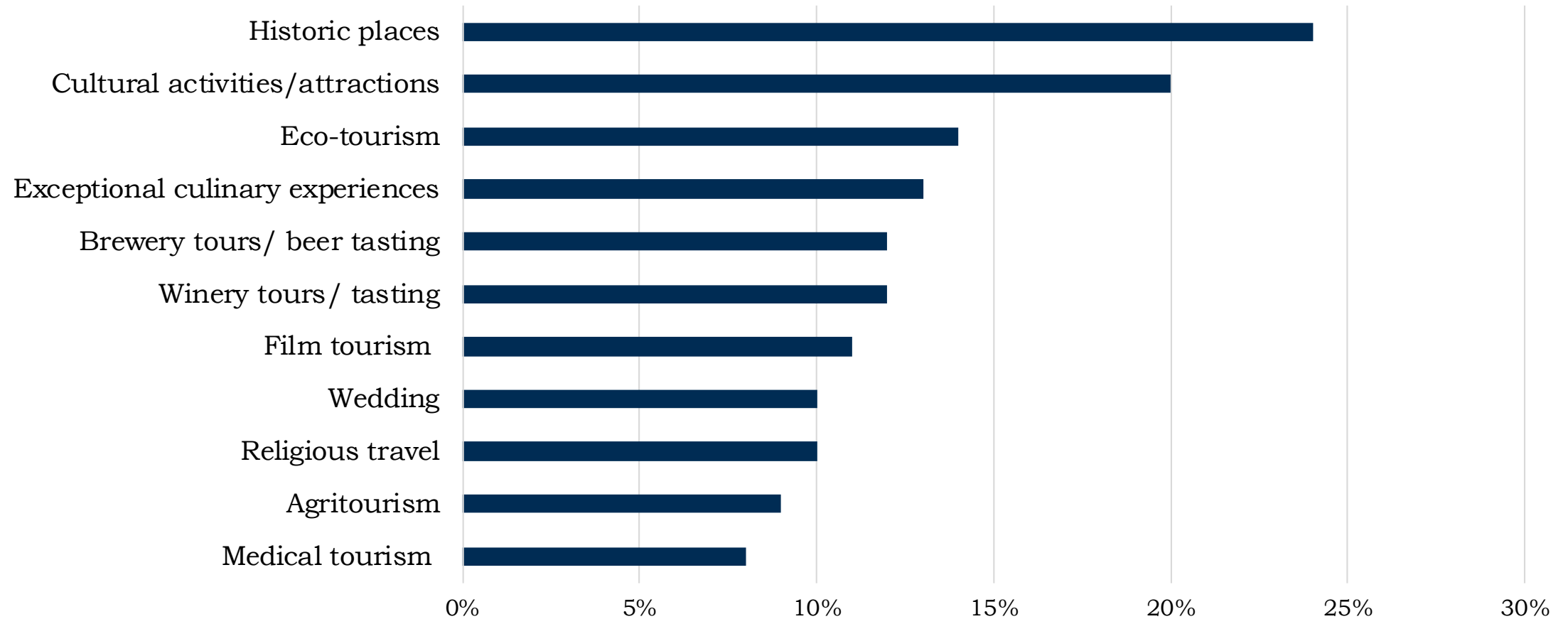


Source: Longwoods International



Activities of Special Interest

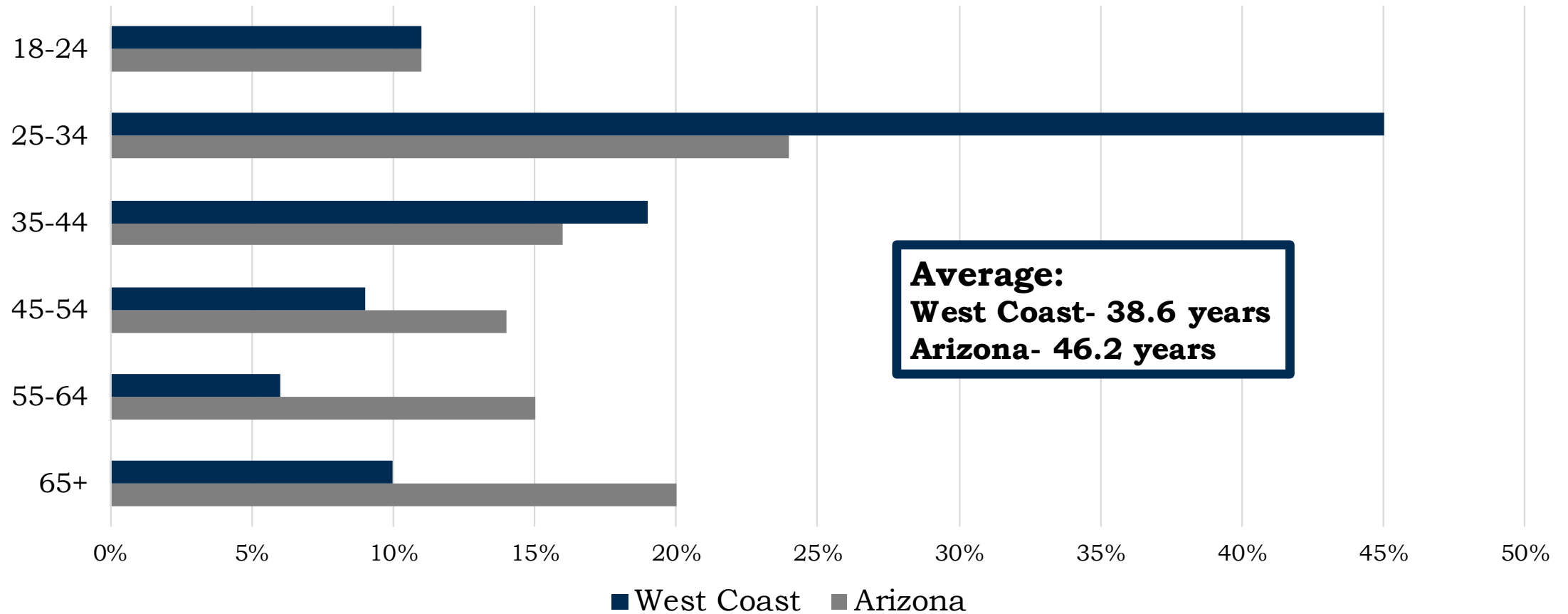
West Coast Region





Age

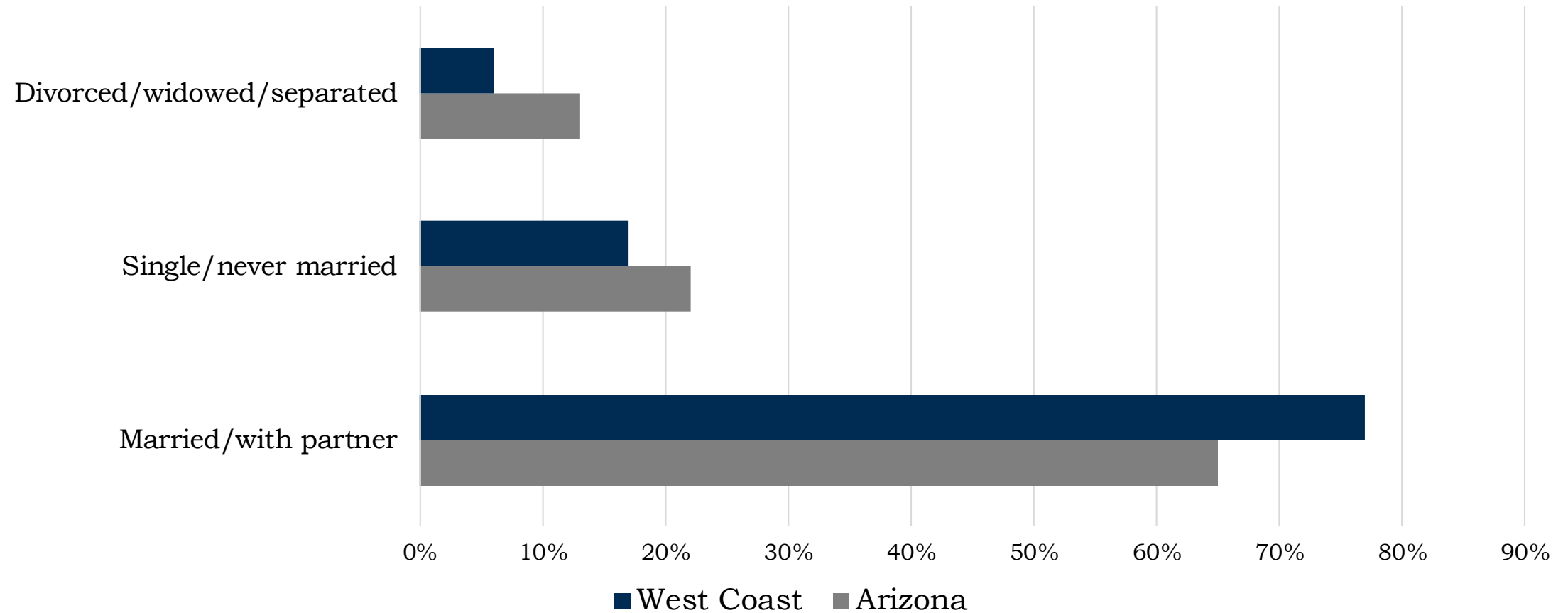
West Coast Region





Marital Status

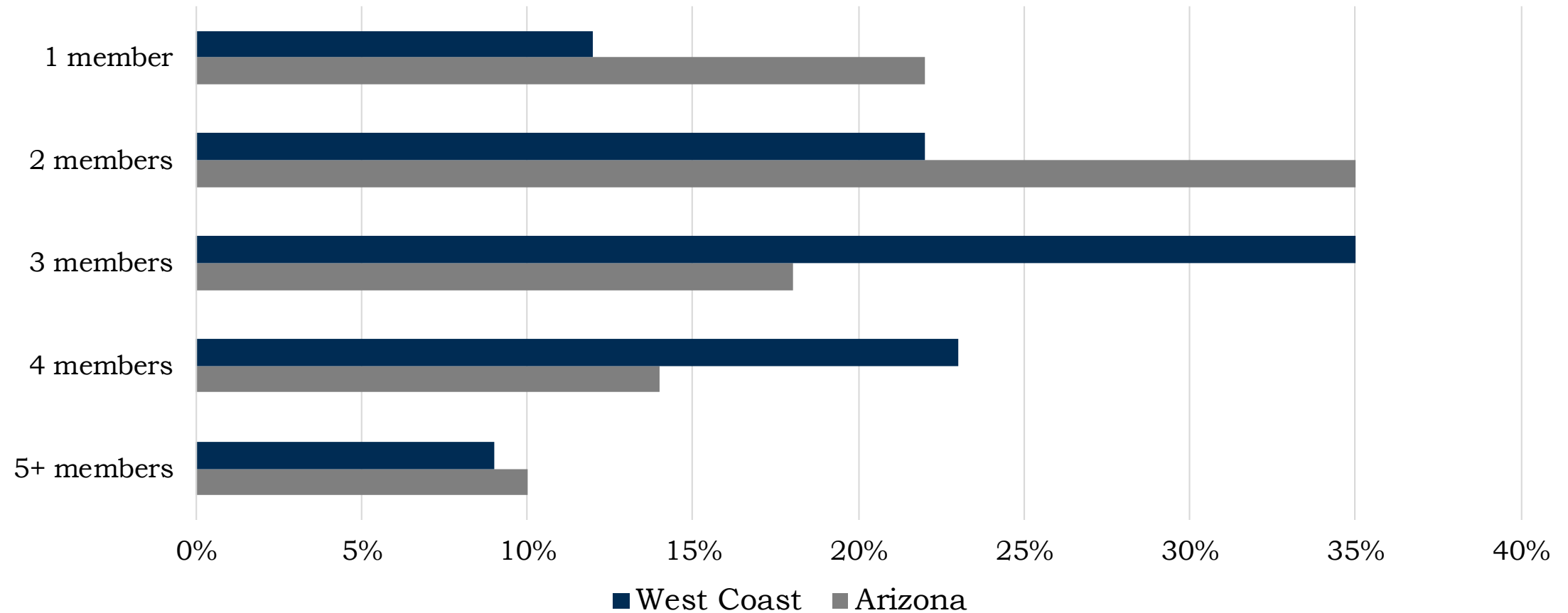
West Coast Region





Household Size

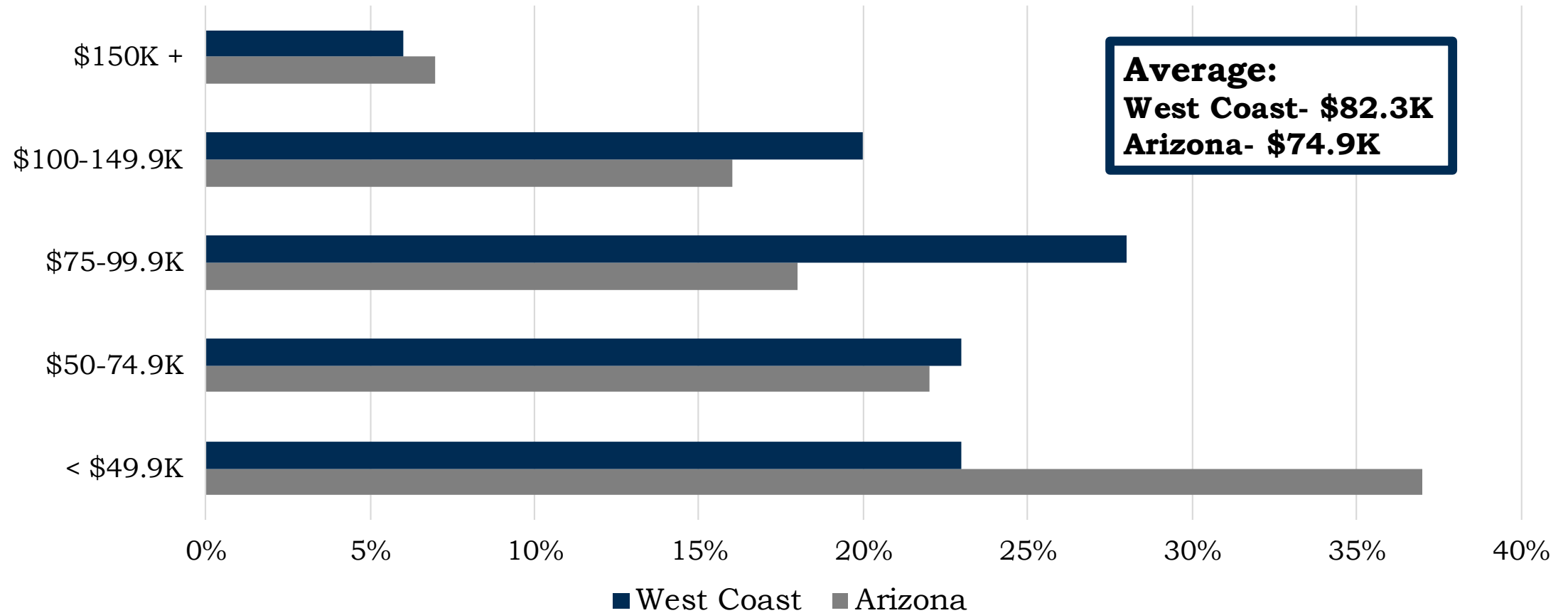
West Coast Region





Household Income

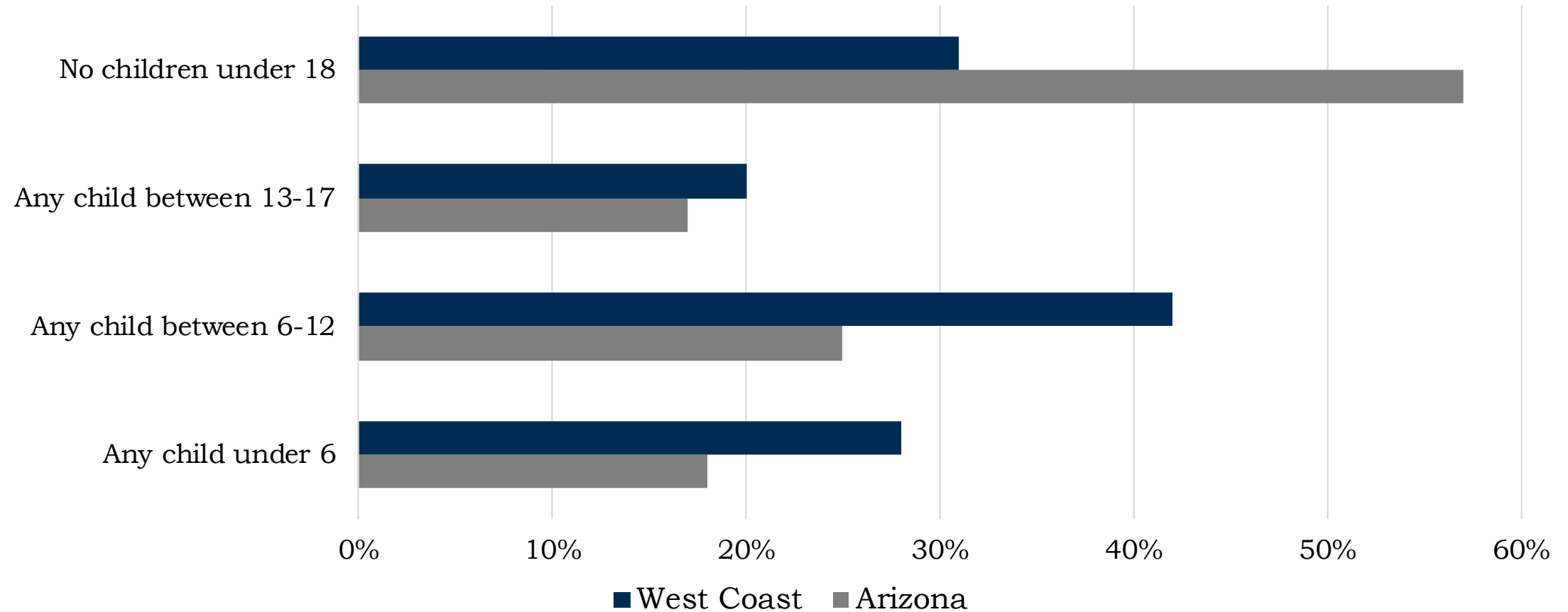
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Children in Household

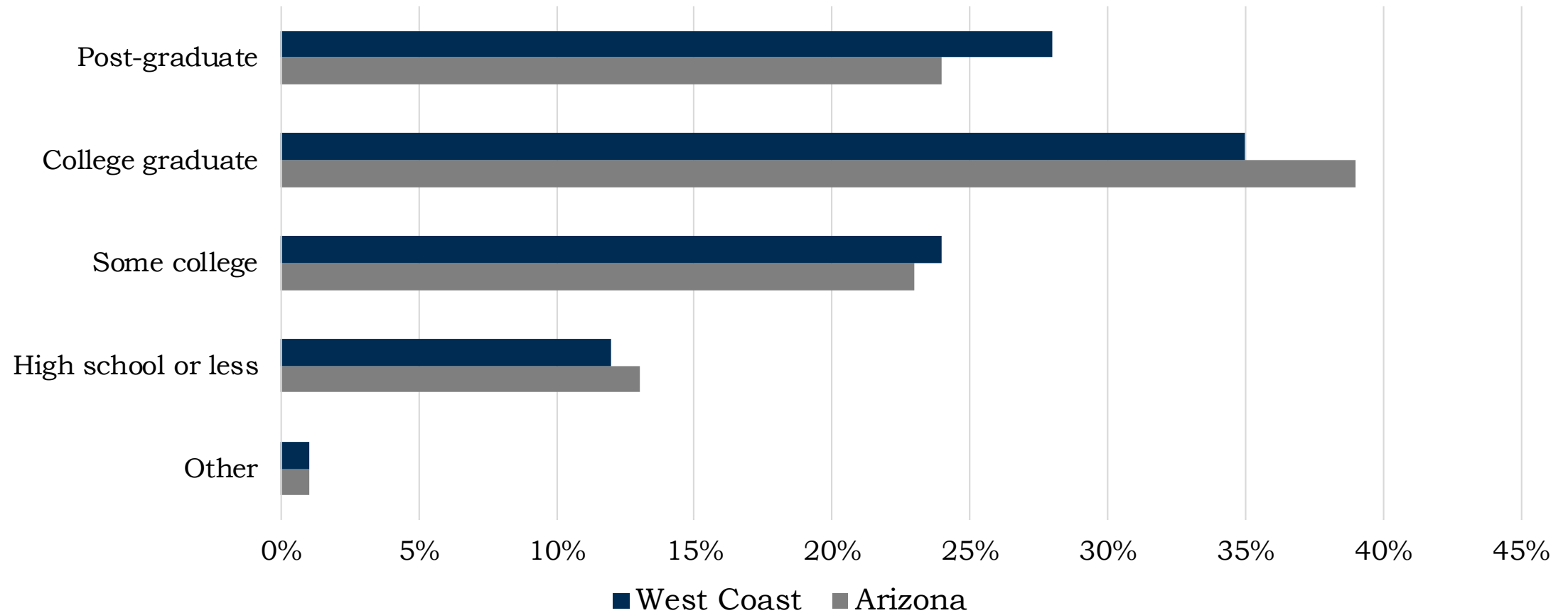
West Coast Region





Education

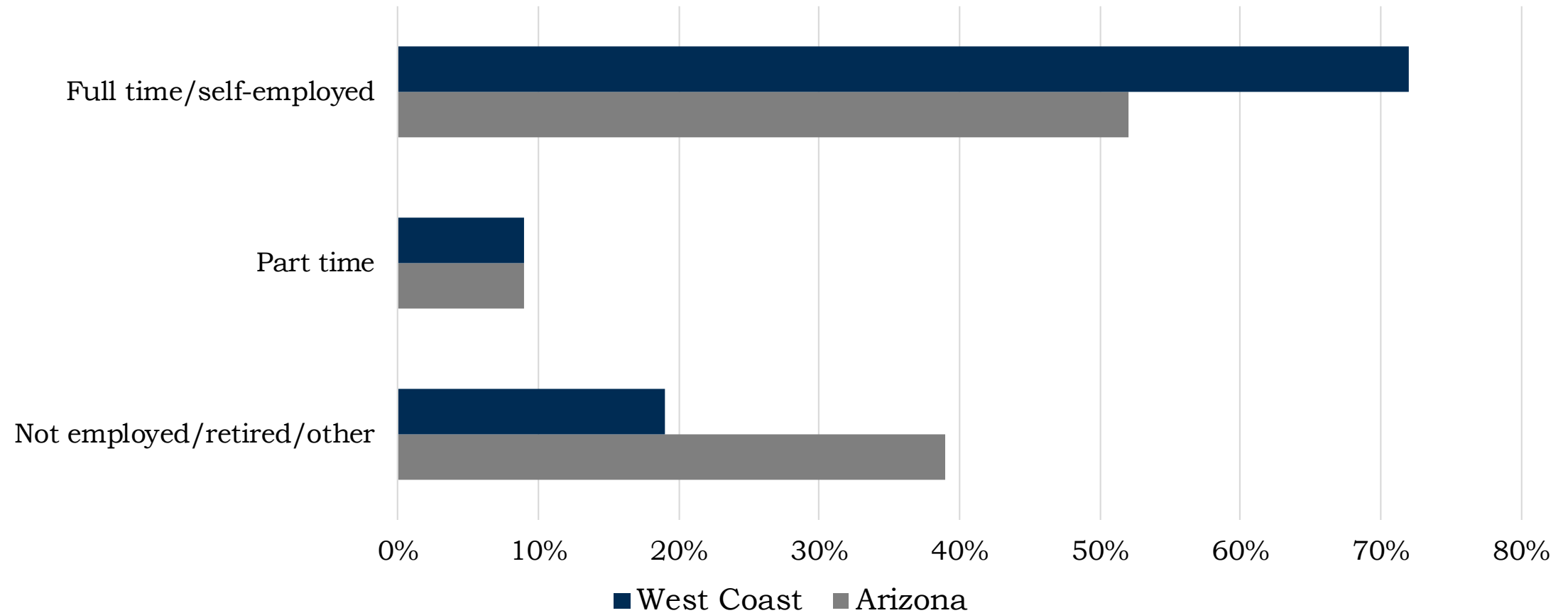
West Coast Region





Employment

West Coast Region



Stay Connected



Presentation slides available at:

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

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