



Phoenix & Central Region 2018 Year-End Data Review

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AOT Research Staff



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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

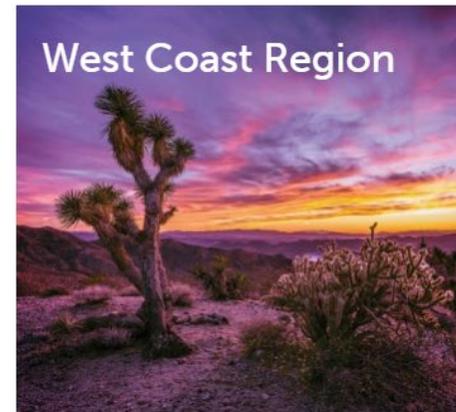
<http://tourism.az.gov/regional-profiles/>



Northern Region



Tucson & Southern Region



West Coast Region



North Central Region



Phoenix & Central Region

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

Phoenix & Central Region



Visitor Spending & Economic Impact

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



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 192,300 industry jobs.

| | |
|---|---|
| Overnight Visitation | Visitor Spending |
| 45.5 million | \$24.4 billion |
| <small>Total Overnight Visitation, 2018</small> | <small>Direct Travel Spending, 2018</small> |
| Taxes | Jobs |
| \$3.63 billion | 192 thousand |
| <small>Total Tax Revenue, 2018</small> | <small>Total Generated Employment, 2018</small> |



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 Phoenix & Central Region Tourism Industry Performance

23.2 million
Domestic Overnight
Visitors



\$16.07 billion
Direct Travel Spending

Regional Impacts, 2018

Phoenix & Central Region



\$16.07 Billion

Up 9.2%

Direct Travel Spending



114,400

Up 3.4%

Jobs



\$1.44 Billion

Up 15.3%

State and Local Taxes



\$5.15 Billion

Up 6.9%

Earnings

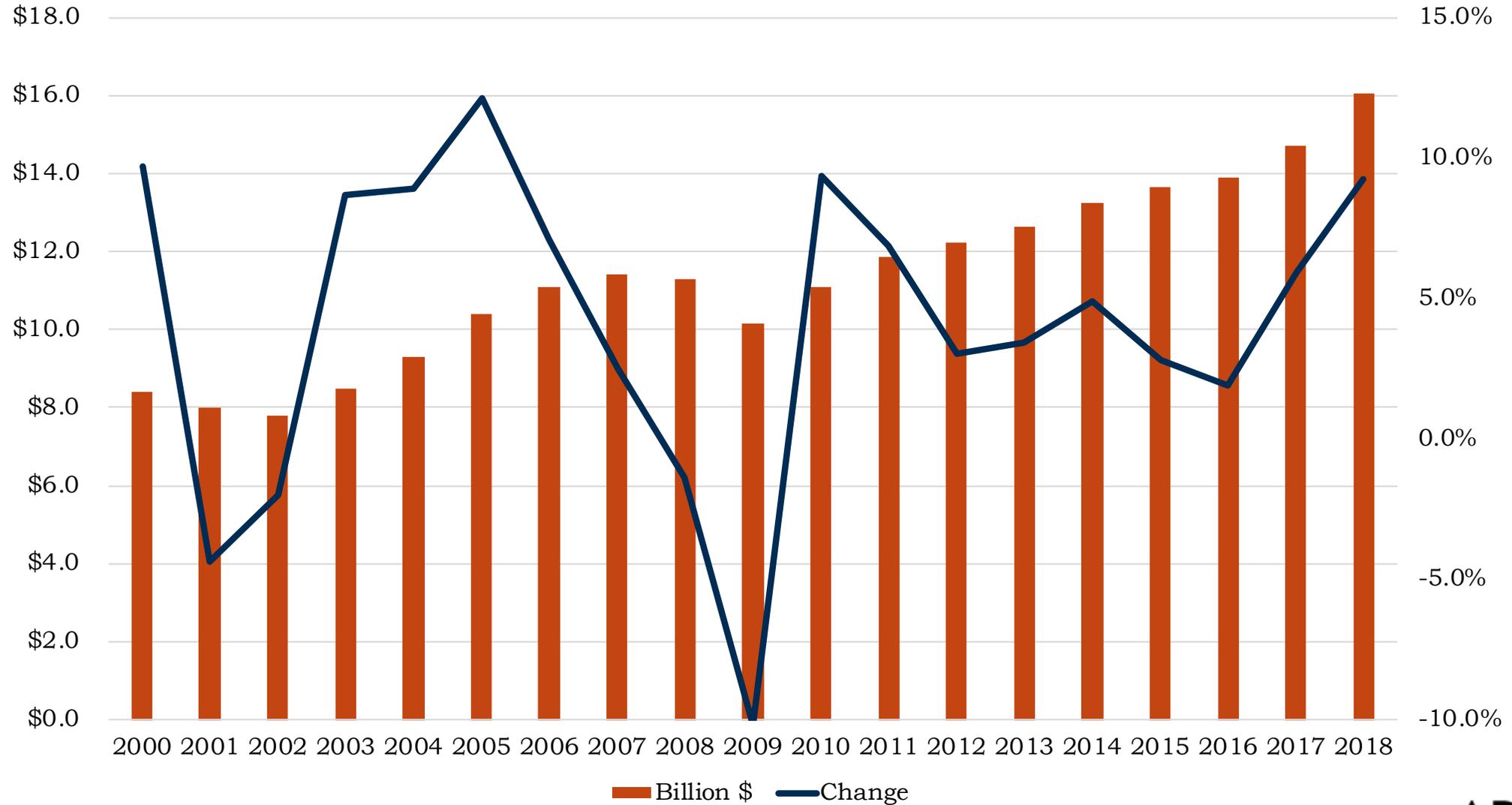
County Impacts, 2018

Phoenix & Central Region

| | Direct Travel Spending (\$million) | Jobs | Earnings (\$millions) | State and Local Taxes (\$millions) | Tax Revenue per Household |
|--------------|--|---------|--------------------------|--|------------------------------|
| Maricopa | \$15,316 | 107,660 | \$4,961 | \$1,375.3 | \$850 |
| YOY % change | 9.2% | 3.7% | 7.0% | 15.6% | |
| Pinal | \$752 | 6,710 | \$187 | \$62.5 | \$420 |
| YOY % change | 8.7% | -1.5% | 3.5% | 7.9% | |

Regional Direct Travel Spending

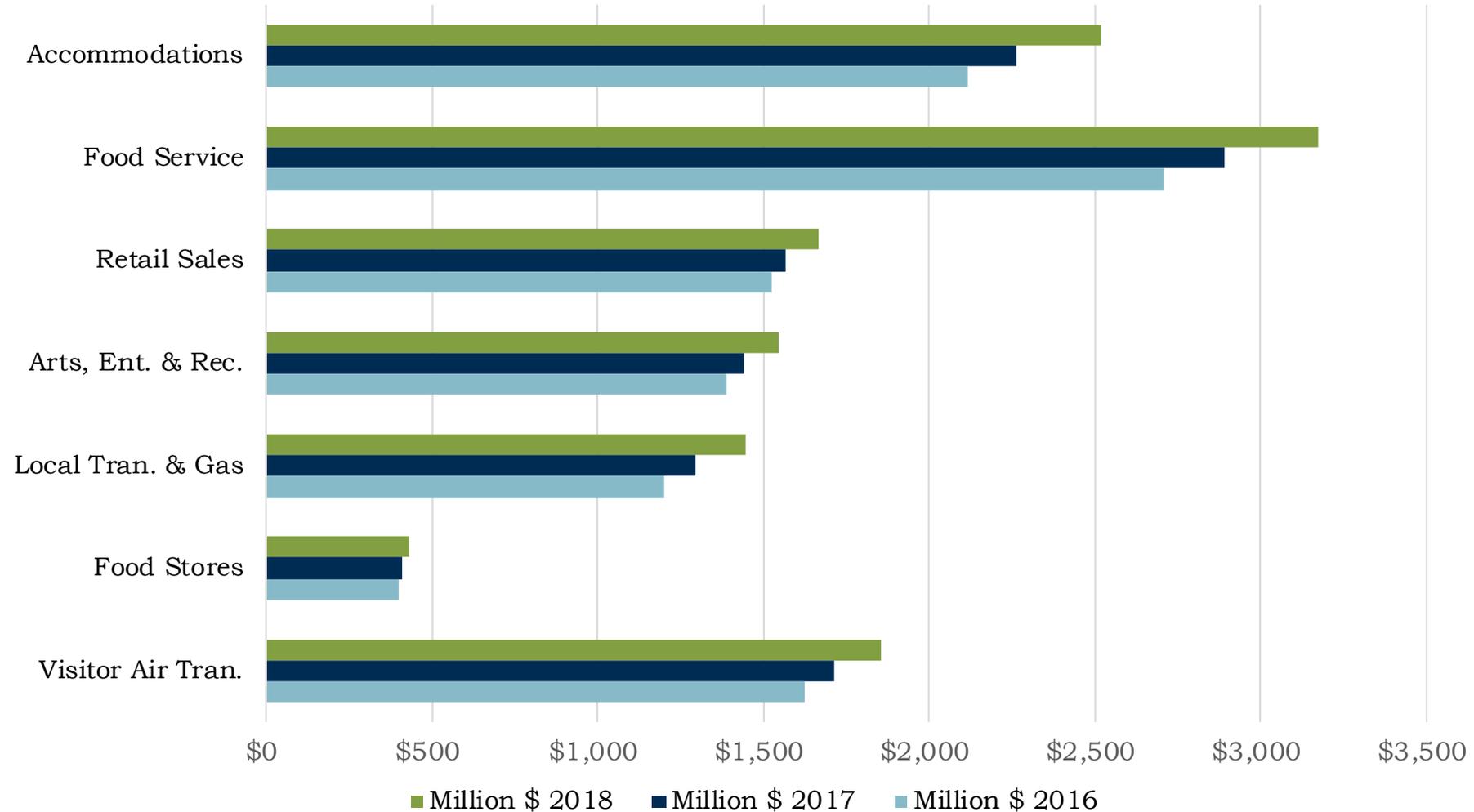
Phoenix & Central Region



Source: Dean Runyan Associates

Spending by Commodity Purchased

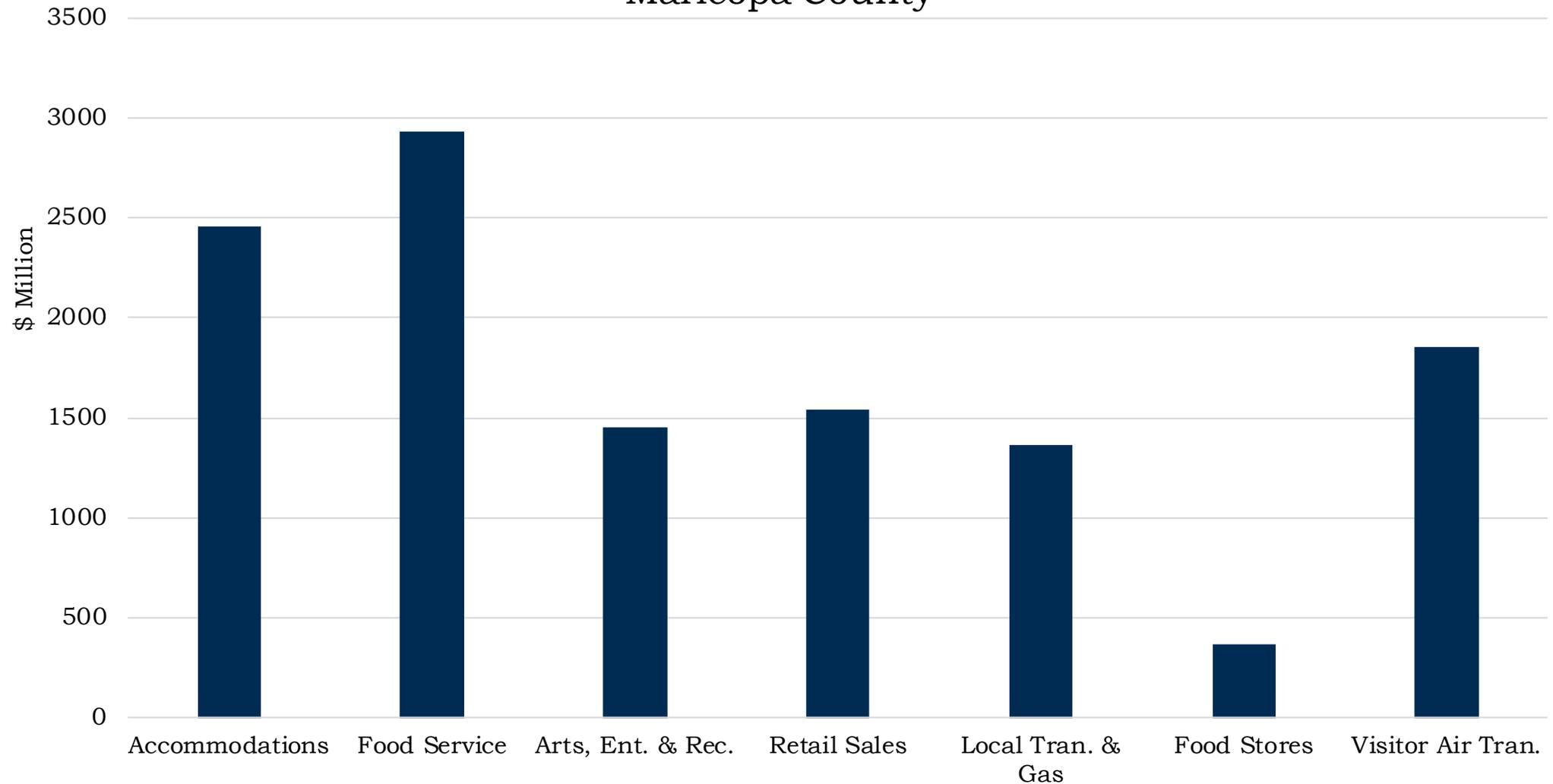
Phoenix & Central Region



Source: Dean Runyan Associates

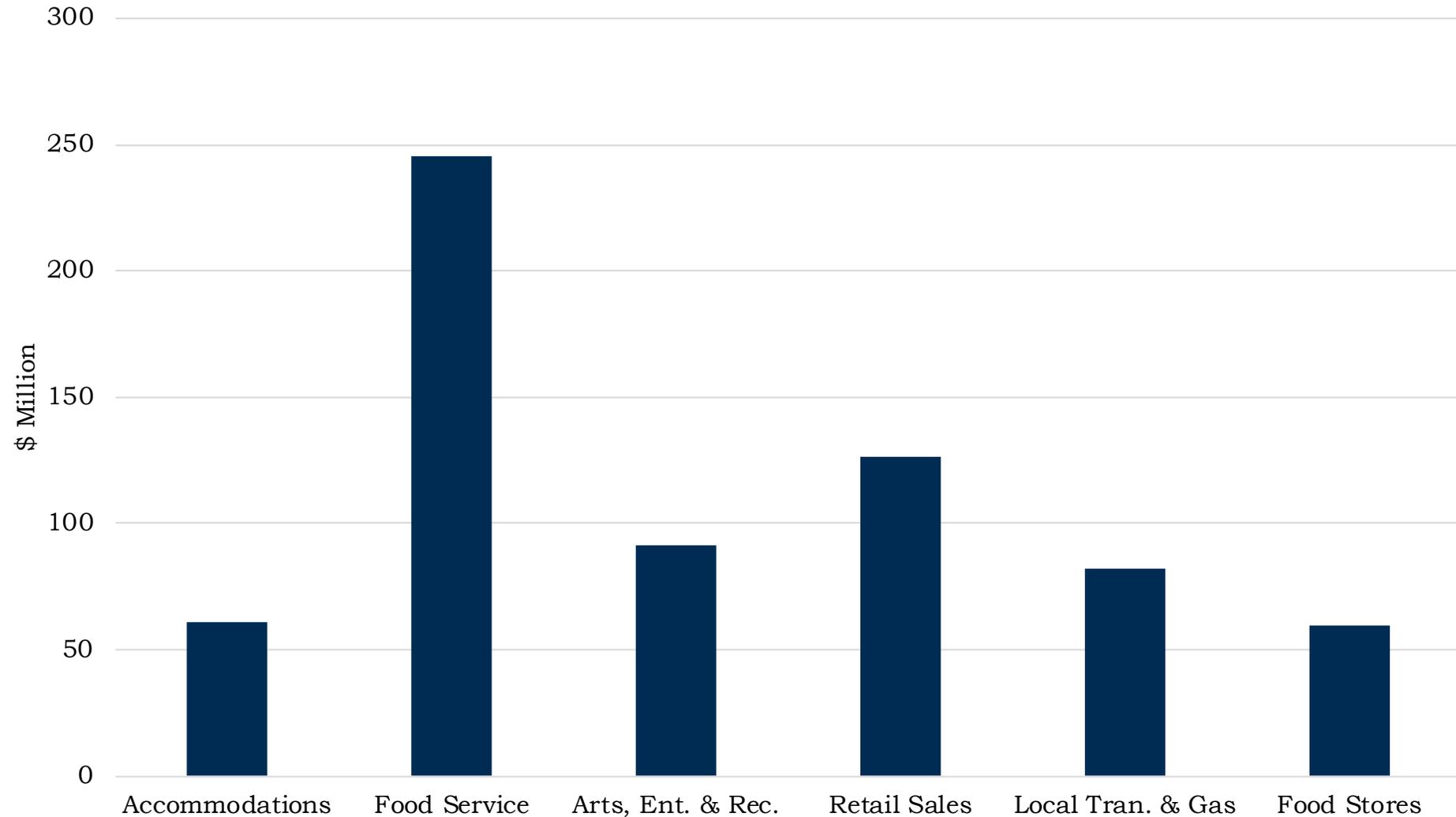
Spending by Commodity Purchased

Maricopa County



Spending by Commodity Purchased

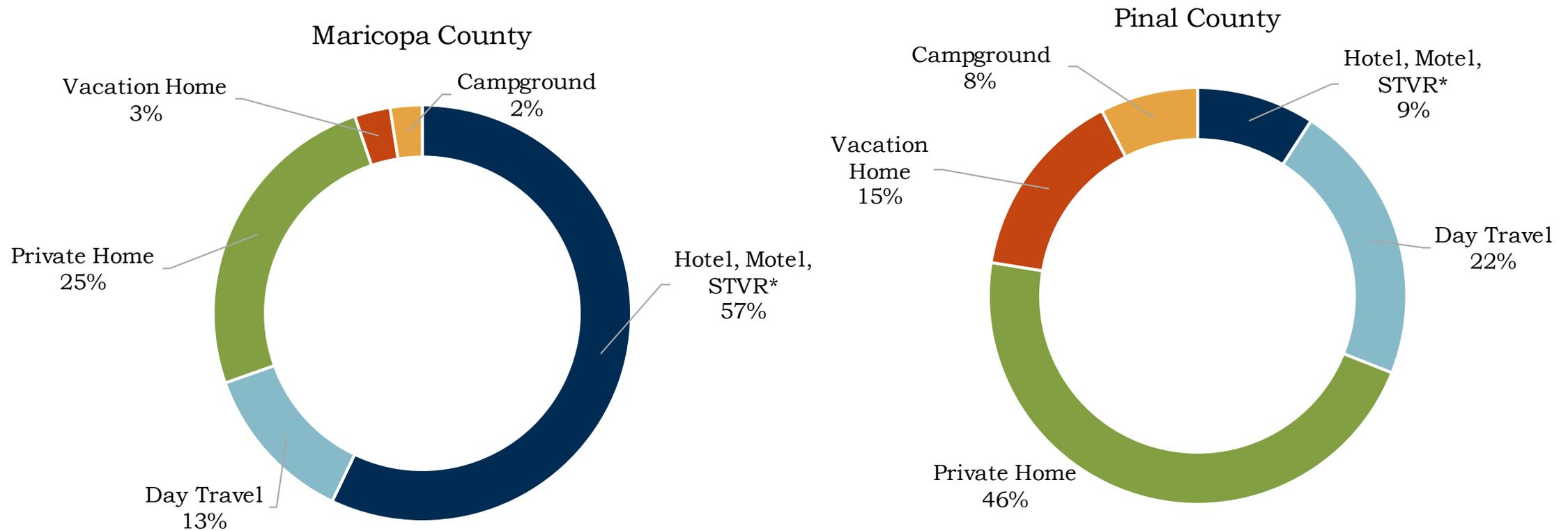
Pinal County



Source: Dean Runyan Associates, 2018

Spending by Type of Accommodation

Phoenix & Central Region





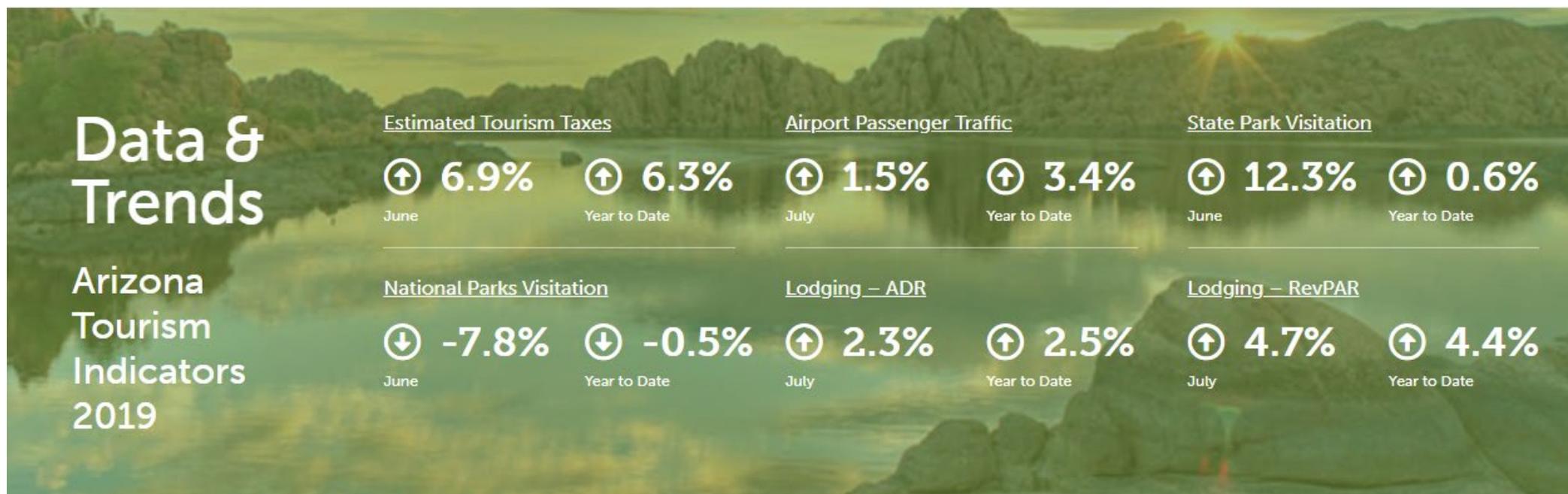
2019 Tourism Indicators To-Date

Phoenix & Central Region



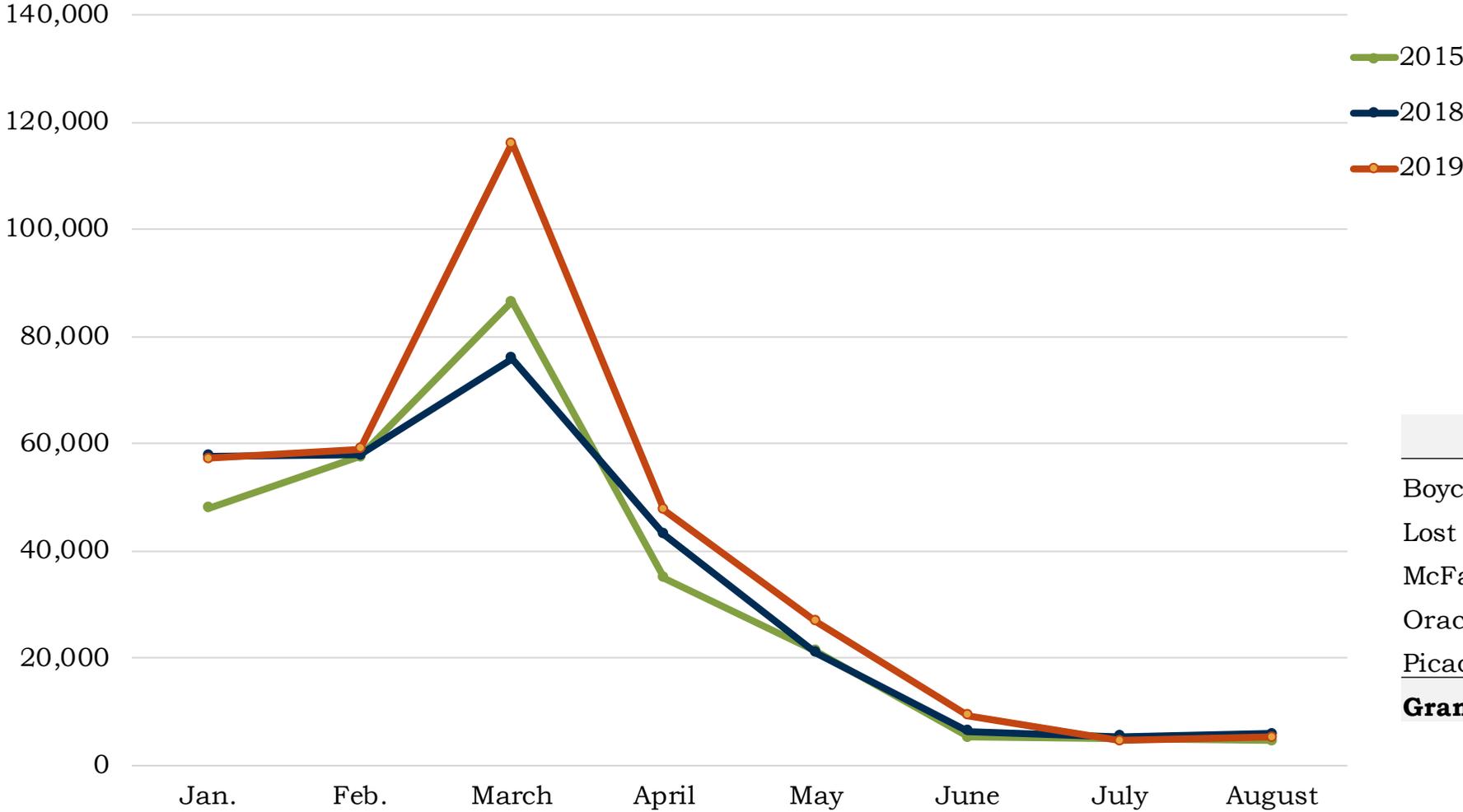
Tourism Indicators

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



State Park Visitation

Phoenix & Central Region



Jan.-August YTD Visitation

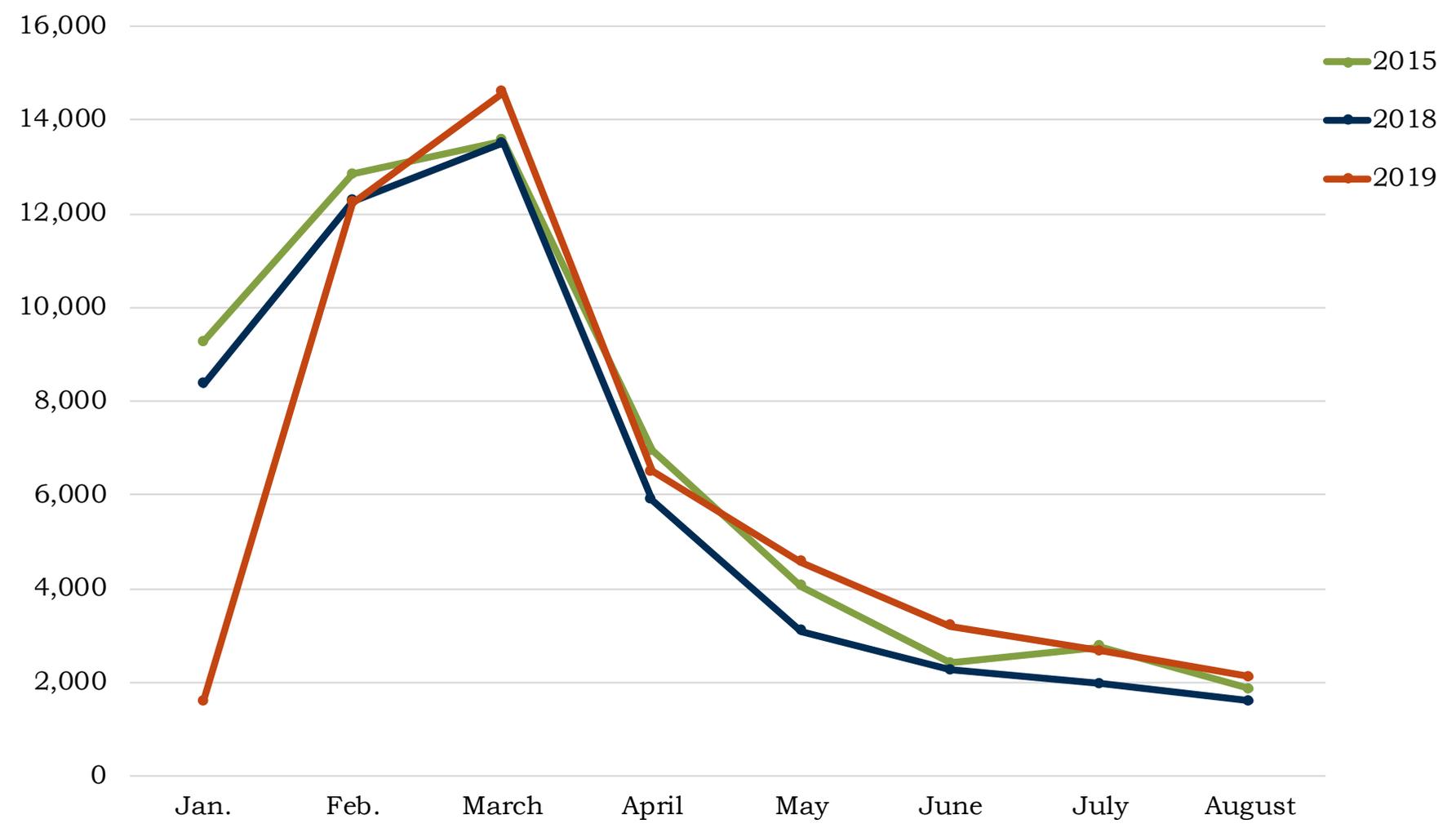
| | 2019 YTD |
|--------------------|-----------------|
| Boyce Thompson ASP | 66,319 |
| Lost Dutchman SP | 147,636 |
| McFarland SHP | 5,106 |
| Oracle SP | 10,753 |
| Picacho Peak SP | 96,451 |
| Grand Total | 326,265 |

Source: Northern Arizona University, Arizona State Parks



National Park Visitation

Phoenix & Central Region



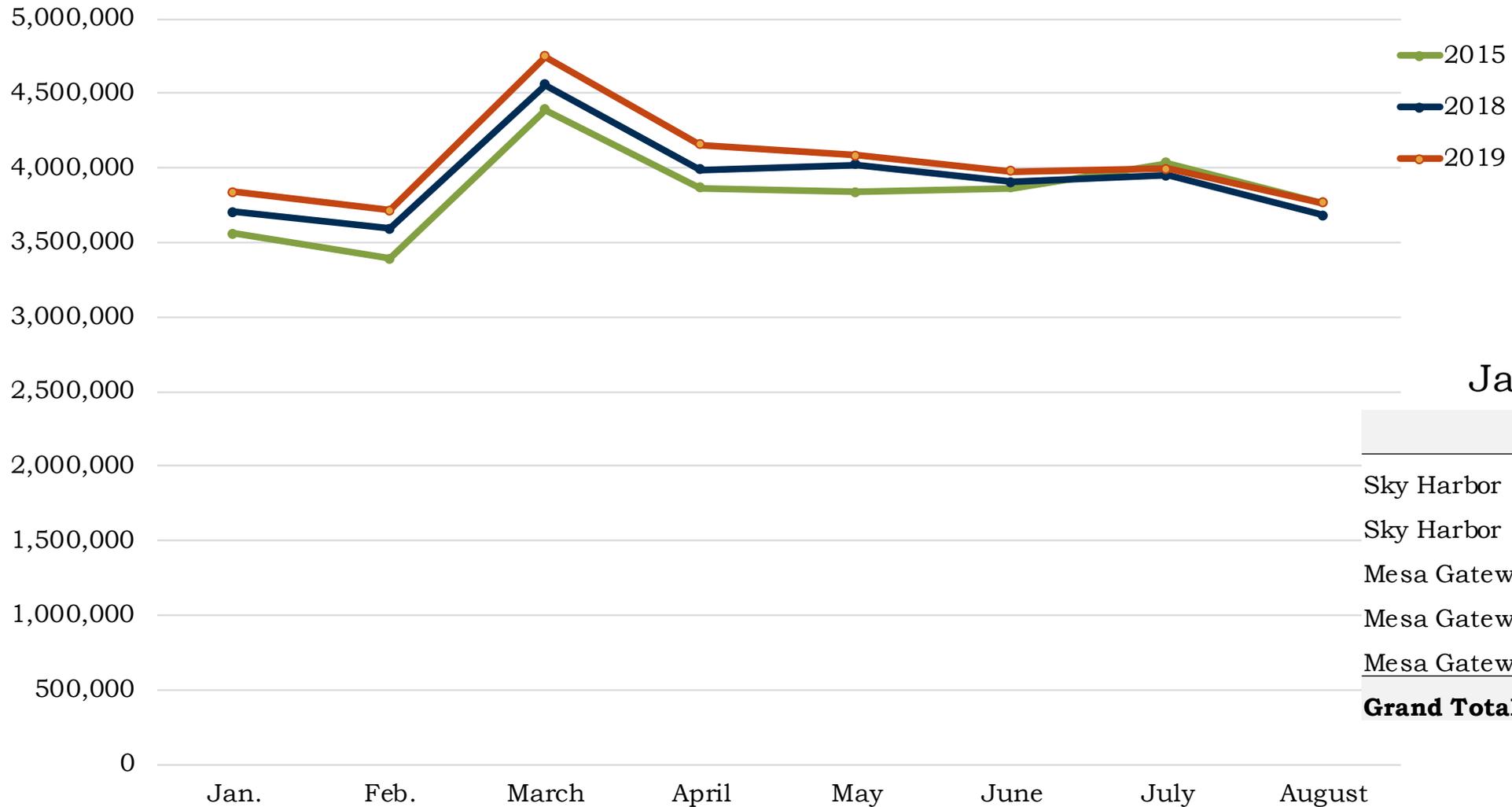
Jan.-August YTD Visitation

| | 2019 YTD |
|----------------|----------|
| Casa Grande NM | 47,487 |

Source: Northern Arizona University, National Park Service

Airport Passenger Volume

Phoenix & Central Region

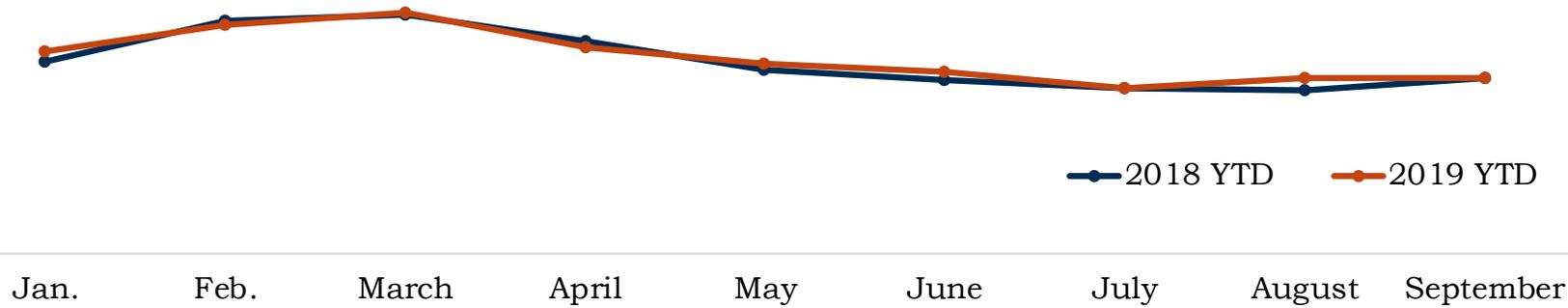


Jan.-August YTD Volume

| | 2019 YTD |
|------------------------------|-------------------|
| Sky Harbor - Domestic | 29,588,070 |
| Sky Harbor - International | 1,443,649 |
| Mesa Gateway - Charter | 836 |
| Mesa Gateway - Domestic | 1,209,715 |
| Mesa Gateway - International | 30,120 |
| Grand Total | 32,272,390 |

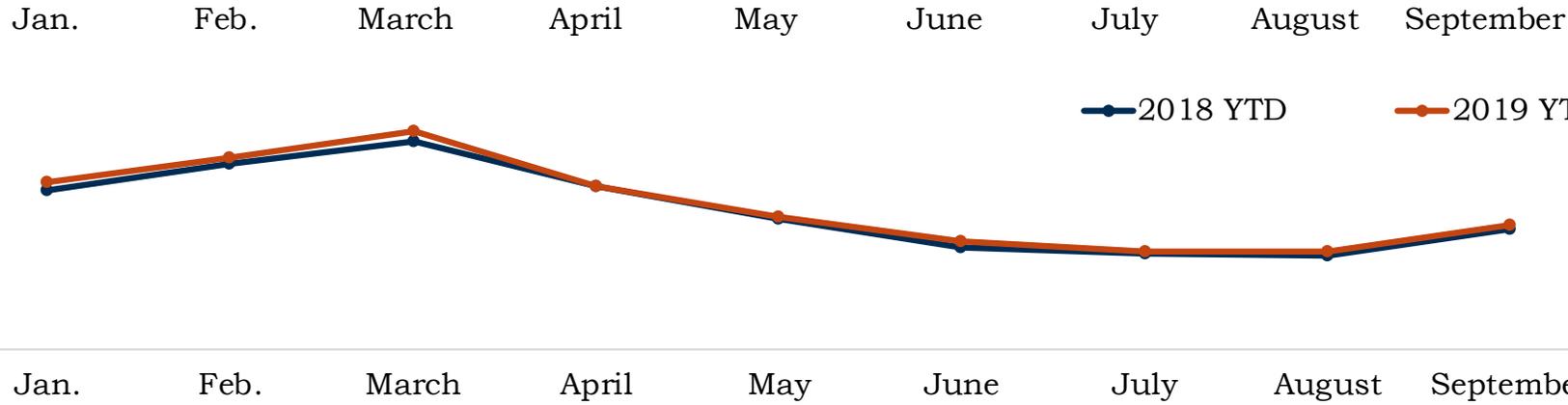
Lodging Indicators

Maricopa County



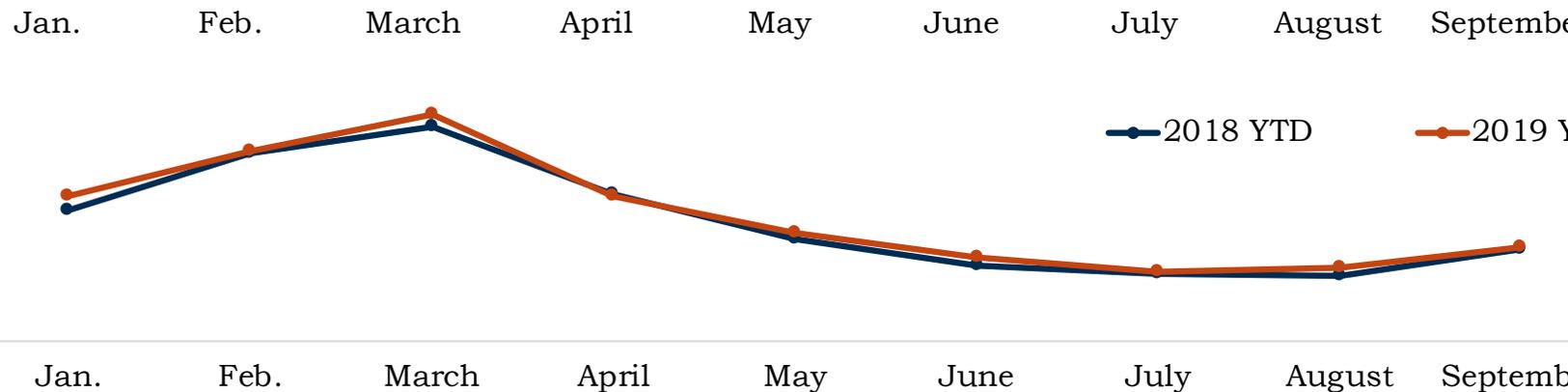
Occupancy

YTD Change = 1.7%



ADR

YTD Change = 2.9%



RevPAR

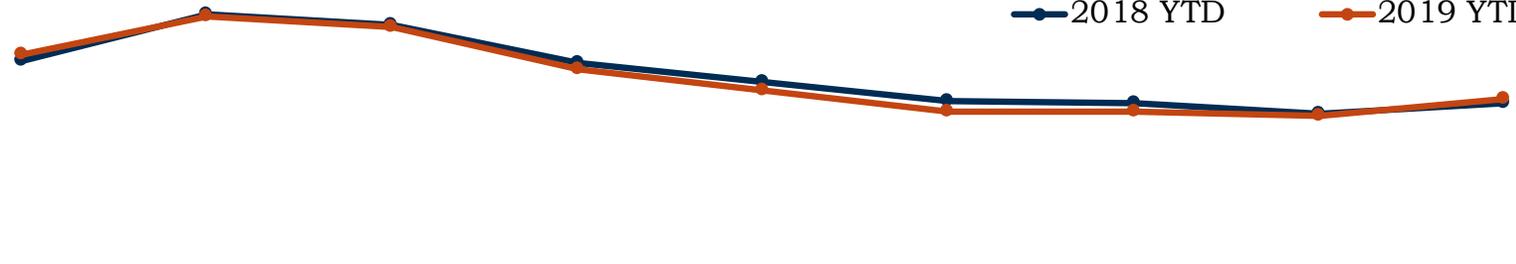
YTD Change = 4.7%



Lodging Indicators

Pinal County

2018 YTD 2019 YTD

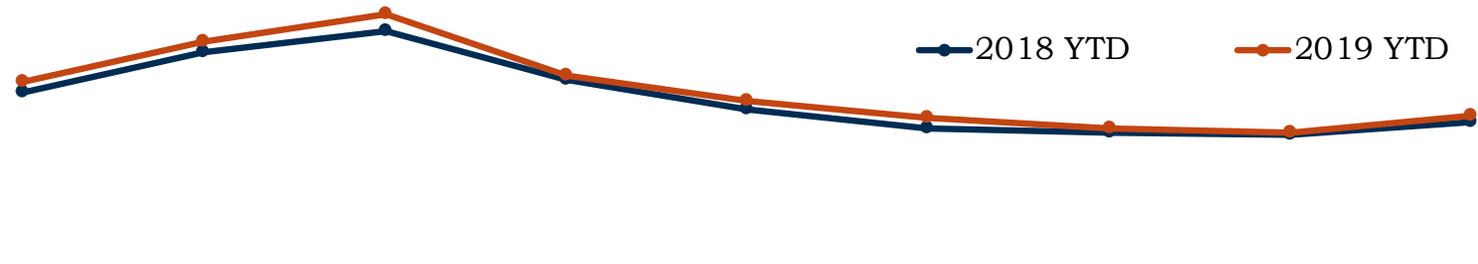


Occupancy

YTD Change = -1.6%

Jan. Feb. March April May June July August September

2018 YTD 2019 YTD

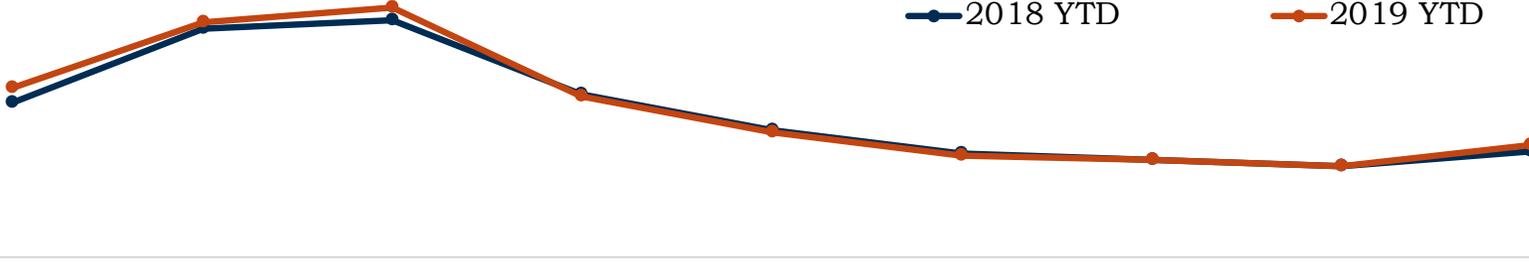


ADR

YTD Change = 4.3%

Jan. Feb. March April May June July August September

2018 YTD 2019 YTD



RevPAR

YTD Change = 2.6%

Jan. Feb. March April May June July August September

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](#)

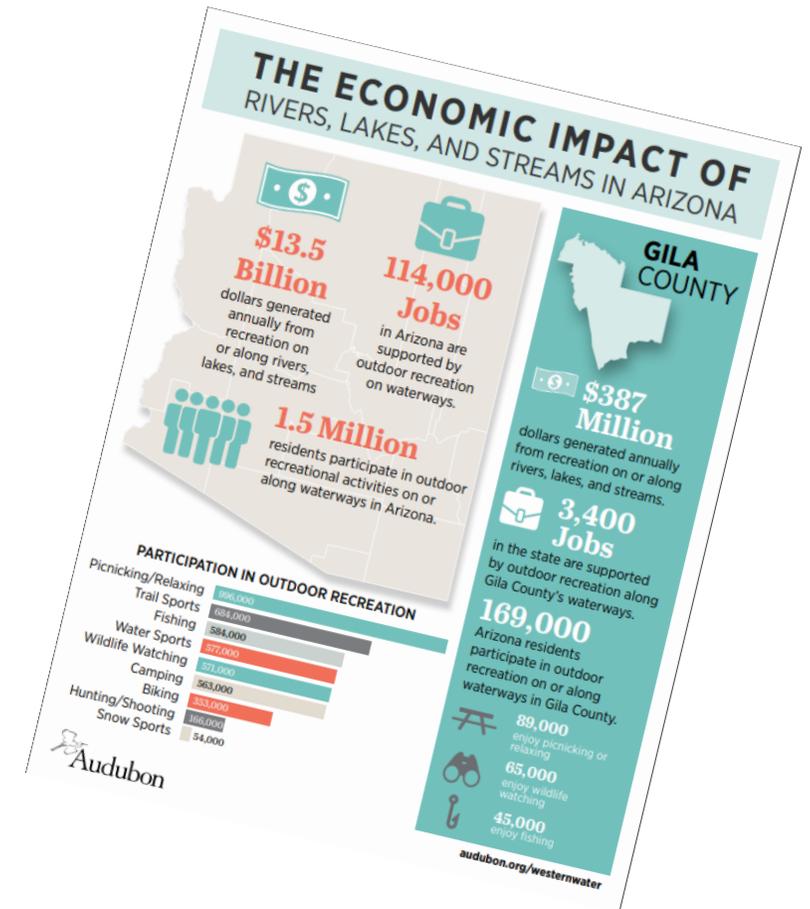
[Graham County: 2006-2018](#)

[Greenlee County: 2006-2018](#)

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

Additional Data Sources

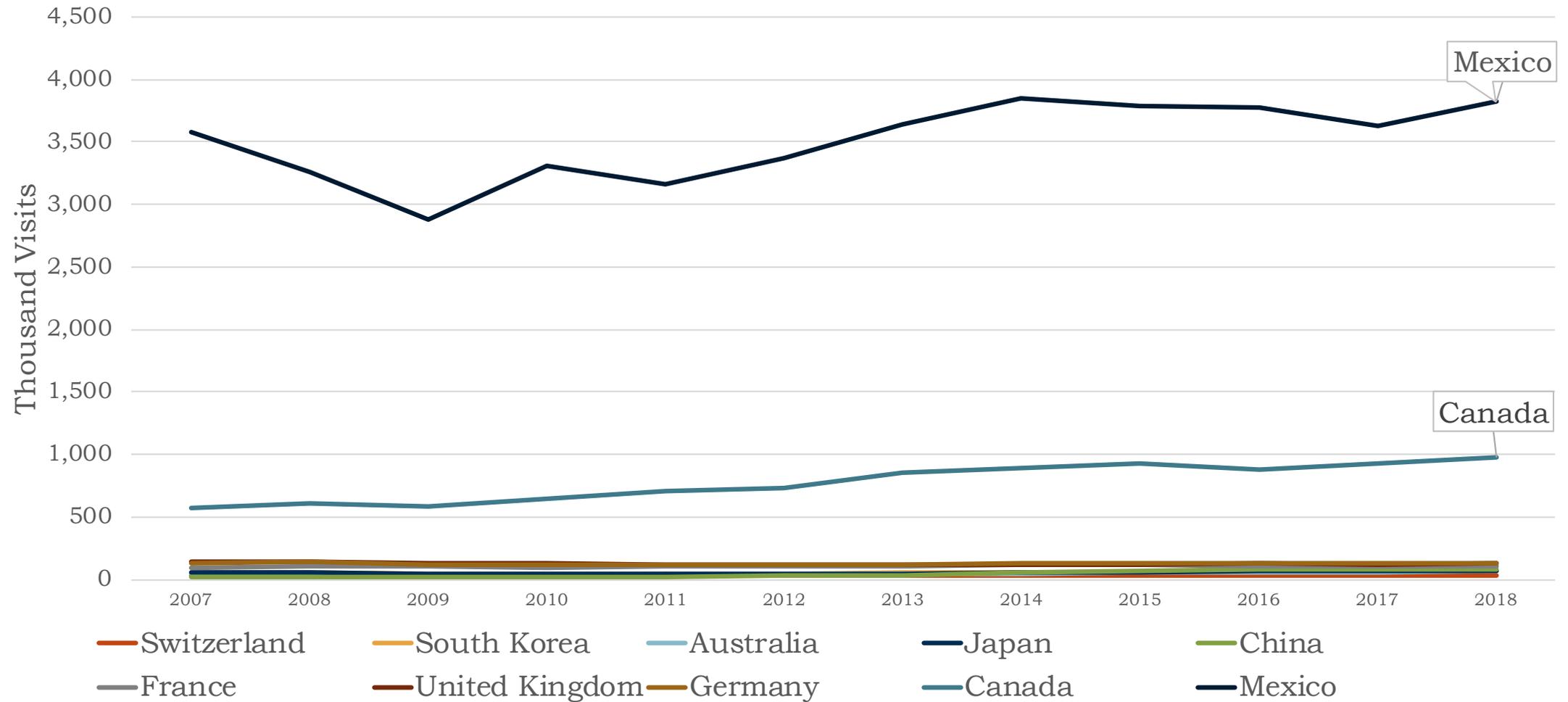
- Arizona State Parks – visitor studies by park
- Audubon Arizona – [The Economic Impact of Arizona's Rivers, Lakes and Streams](#)
- National Park Service - [Economic Contributions of National Park Visitor Spending](#)



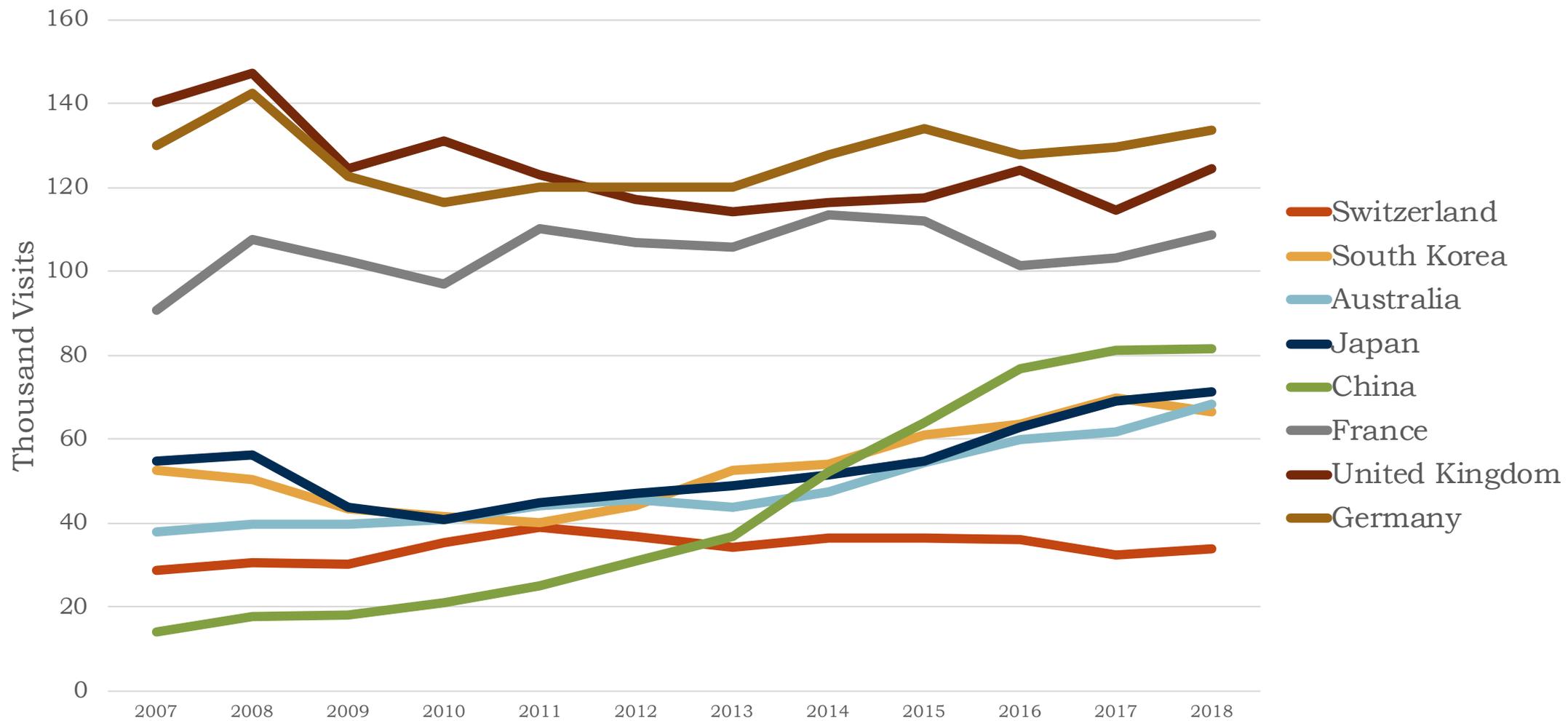


International Visitation

Visitation to Arizona

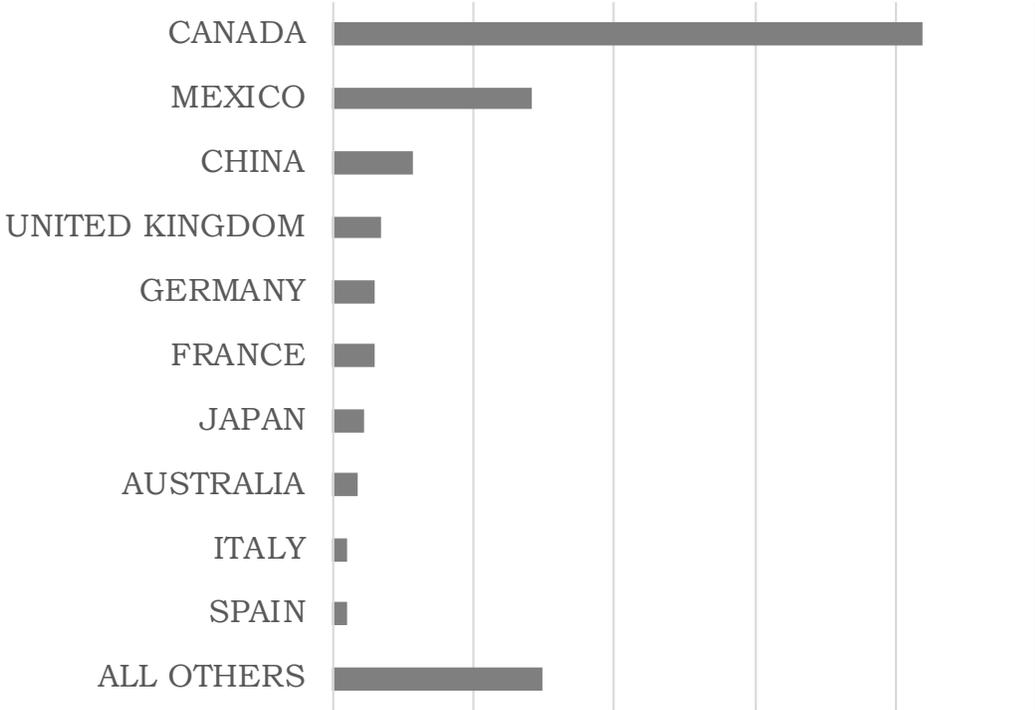


Visitation to Arizona Trend

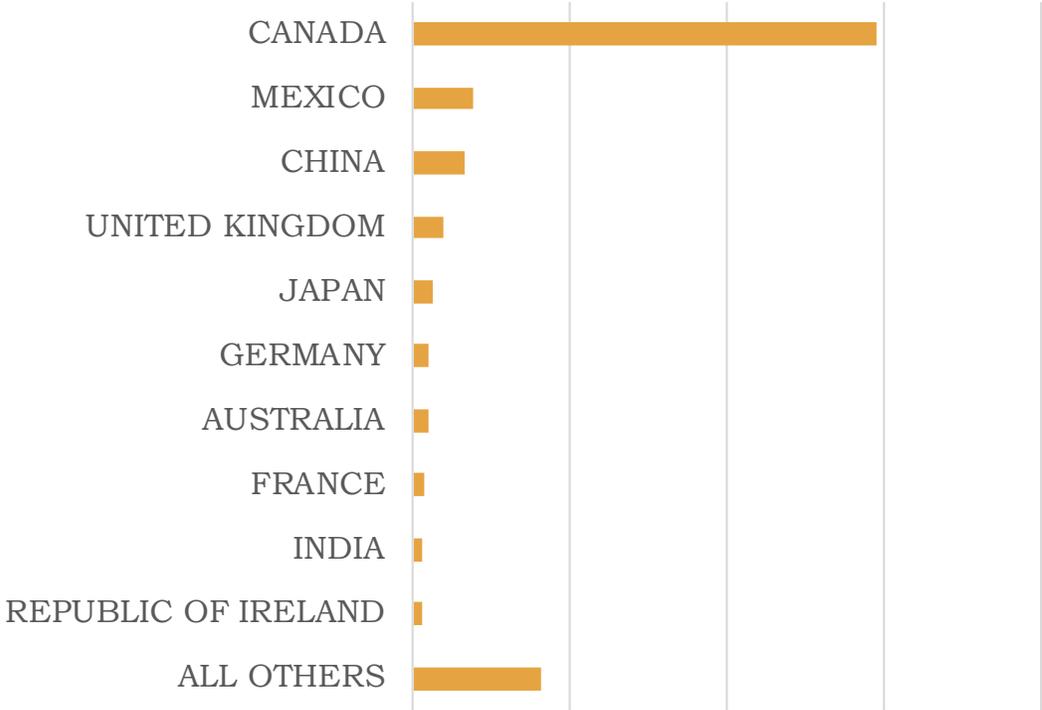


Visa Card Spending Volume

Arizona

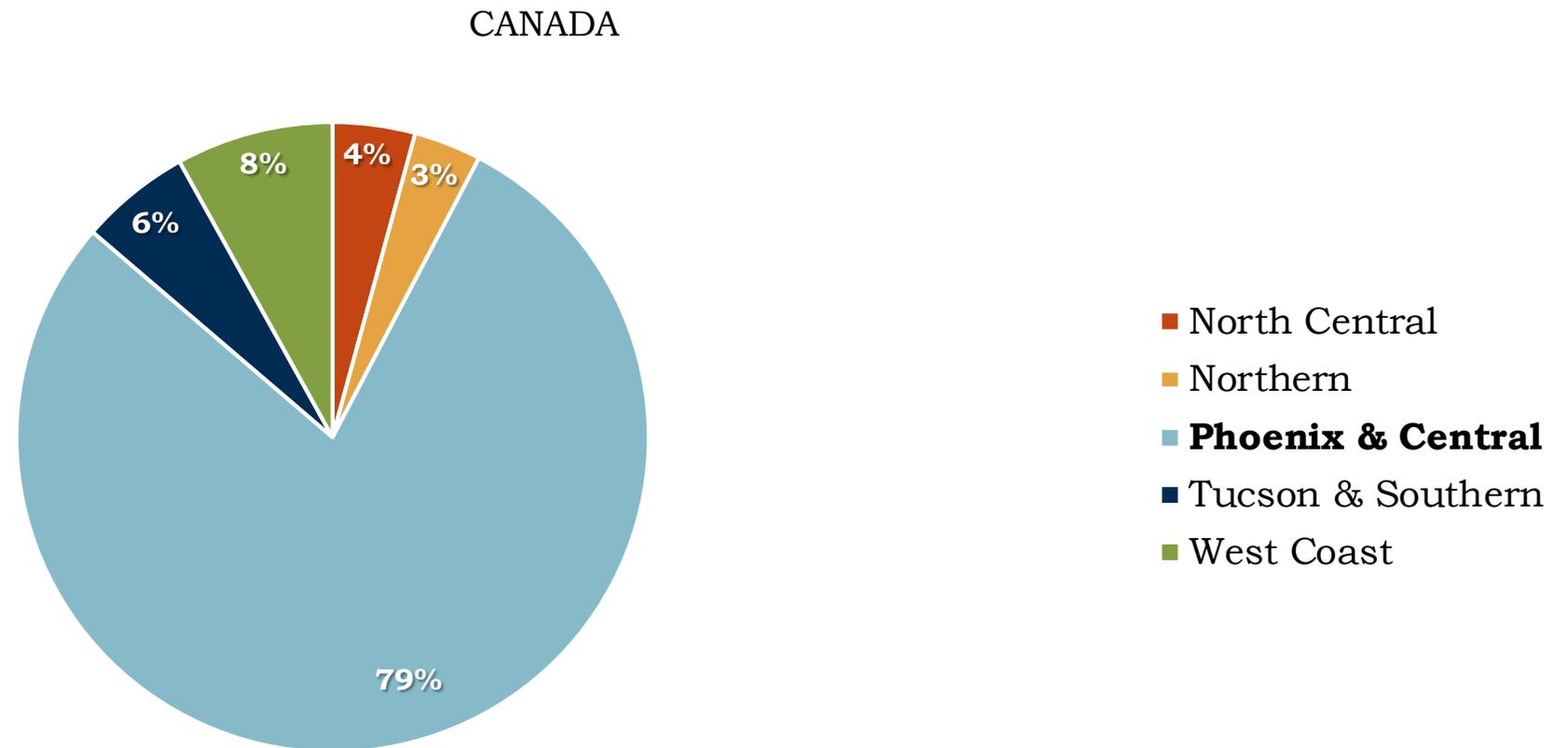


Phoenix & Central Region

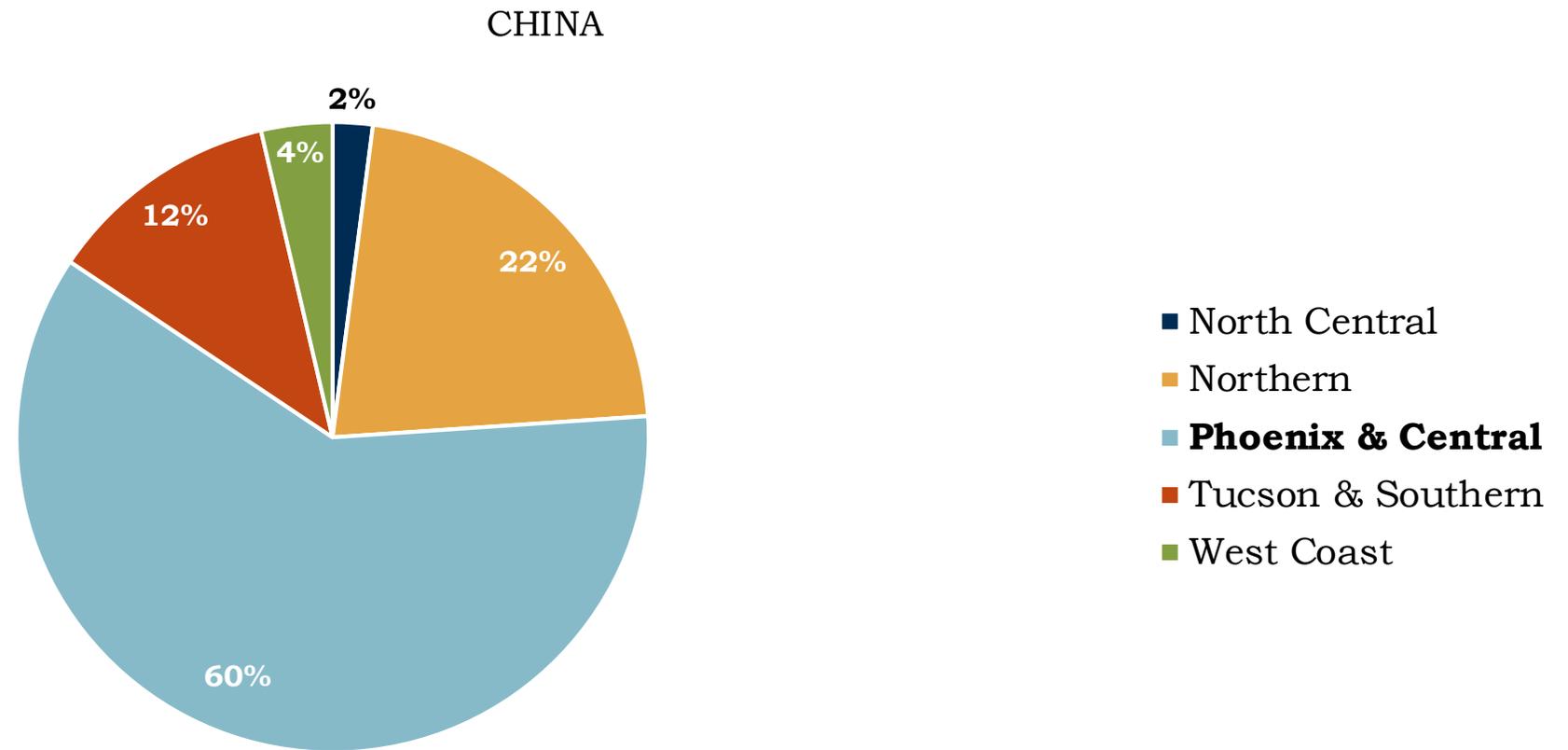


Source: VisaVue Travel, 2018

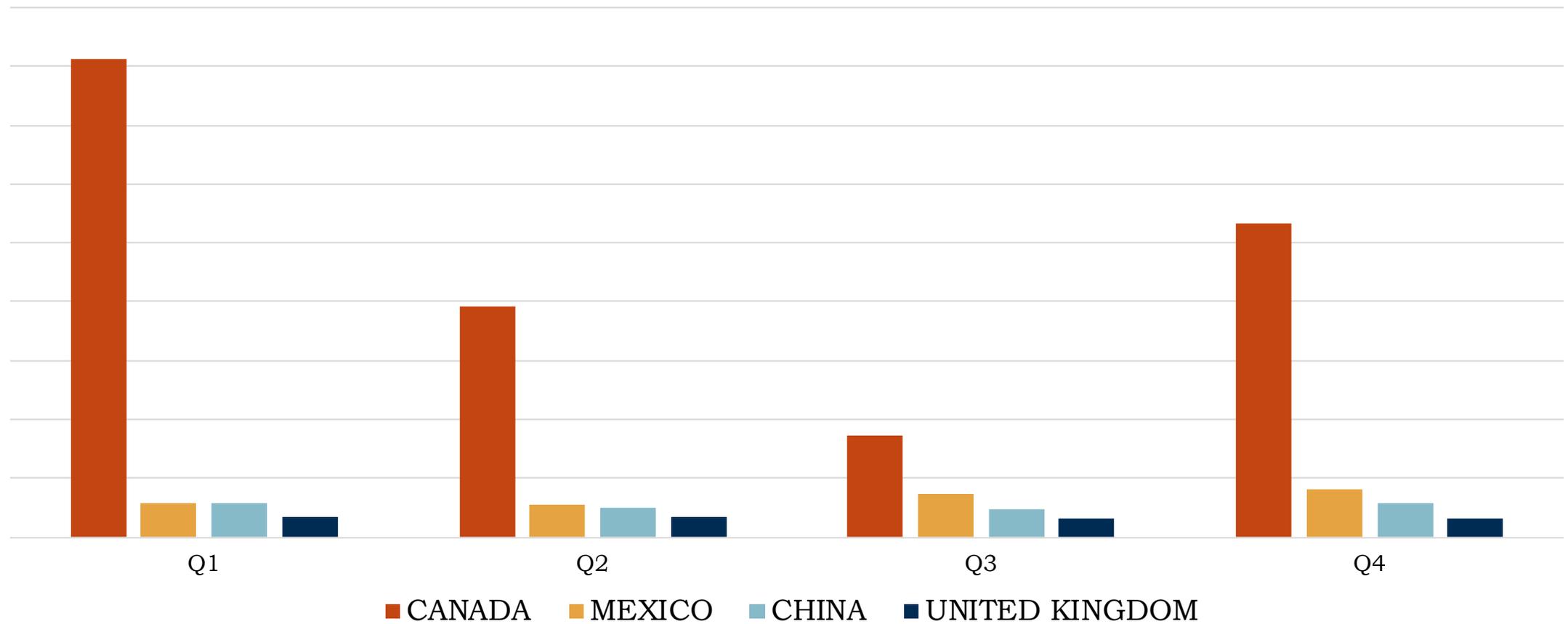
Where do visitors spend the most?



Where do visitors spend the most?



Seasonal Spending



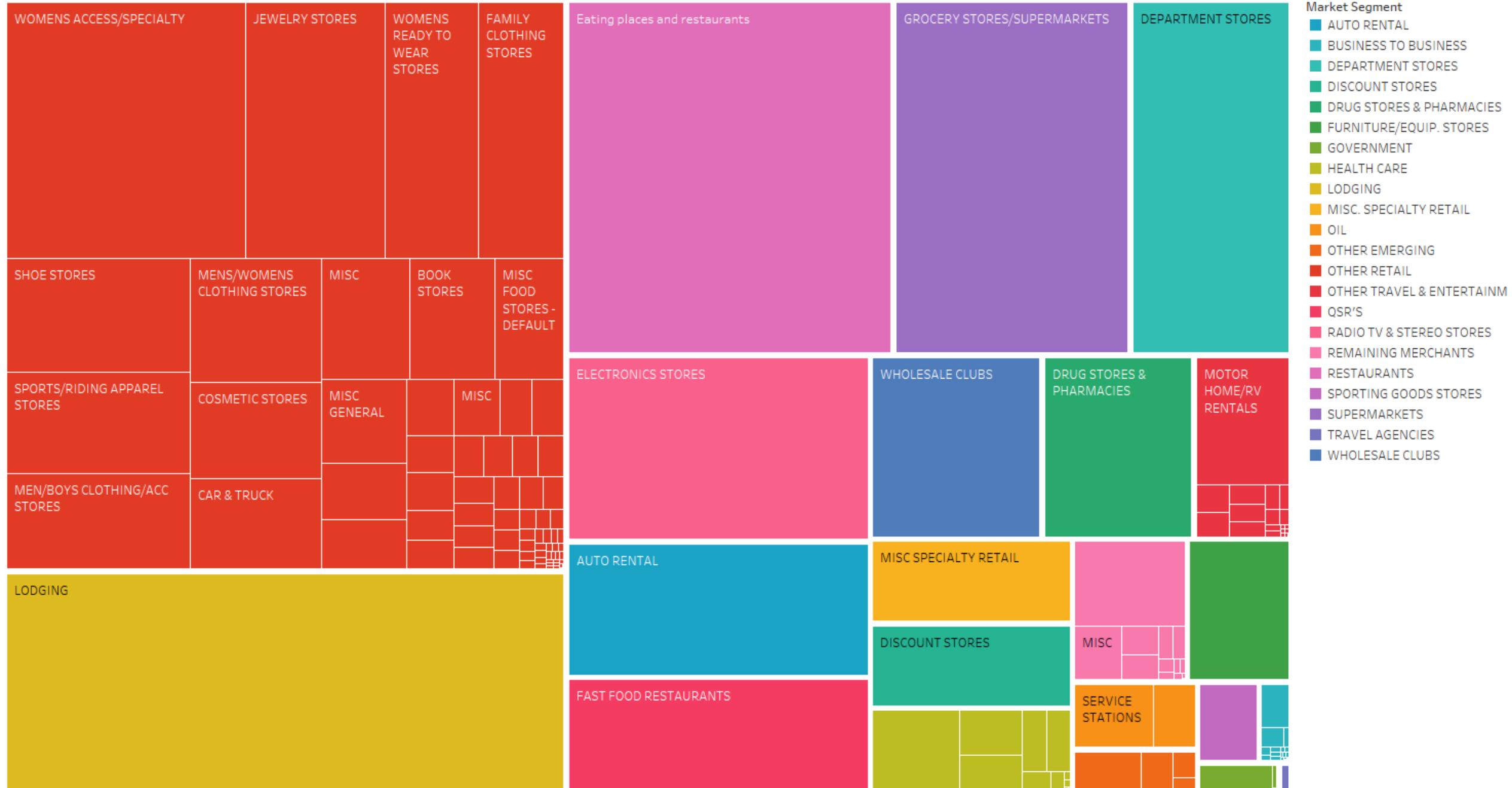
Source: Sales and Cash Withdrawals, VisaVue Travel, 2018

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
 - TRAVEL AGENCIES
 - WHOLESALE CLUBS

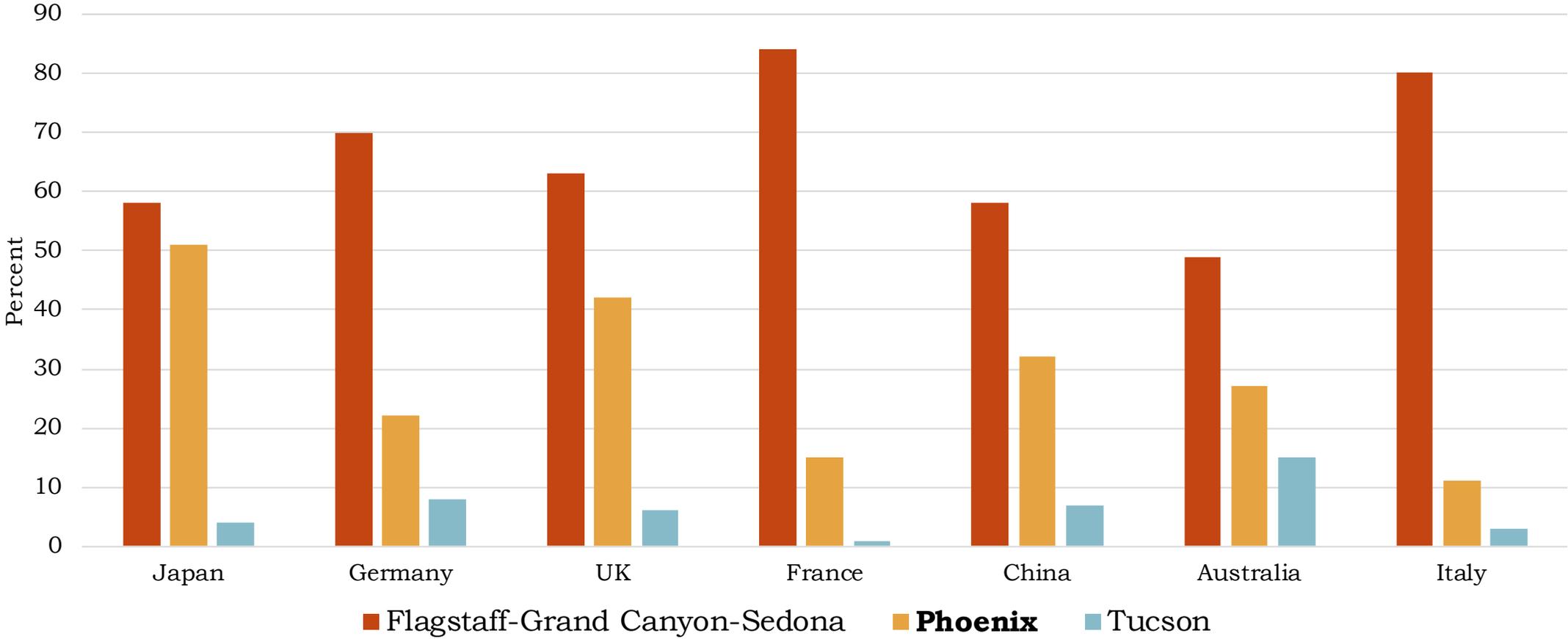
China



United Kingdom



Overseas Visitation – AZ Destinations

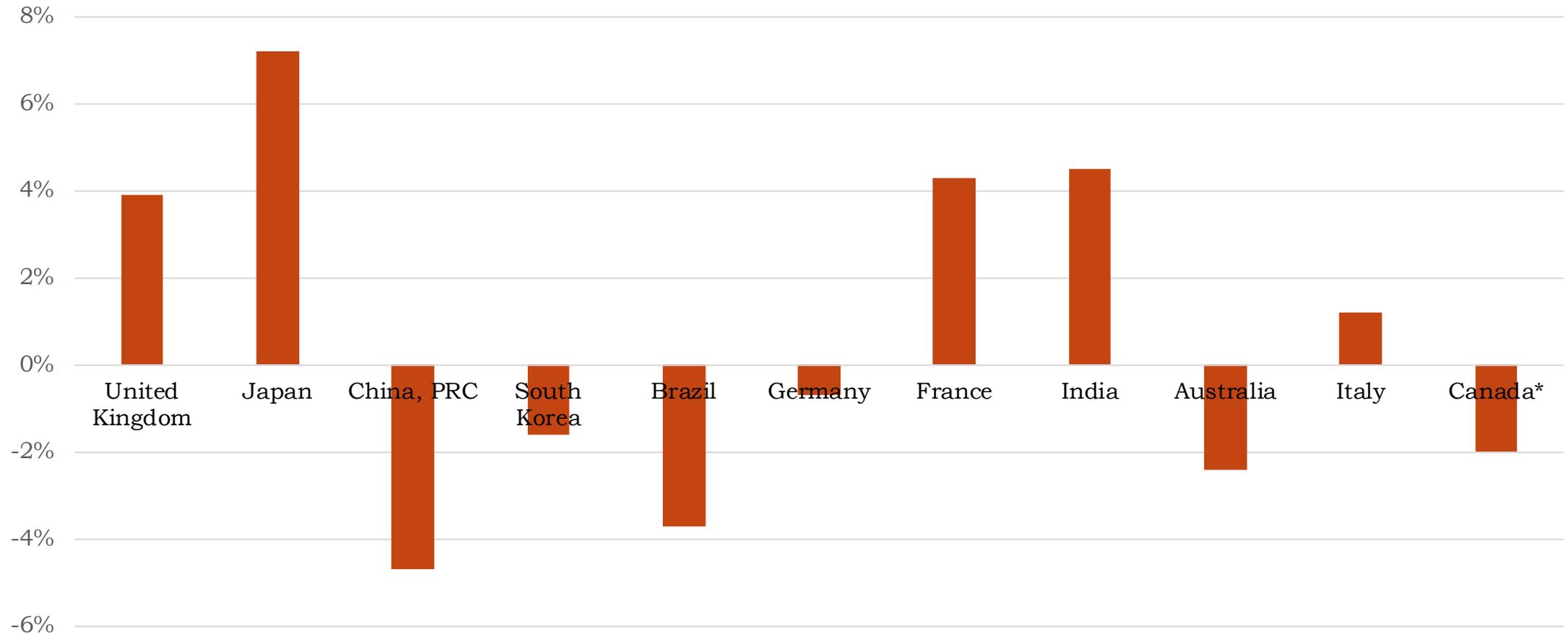


Source: Survey of International Air Travelers 2018, NTTO

2019 International Visitor Trends

Arrivals to the U.S.

% Change YTD September 2019*

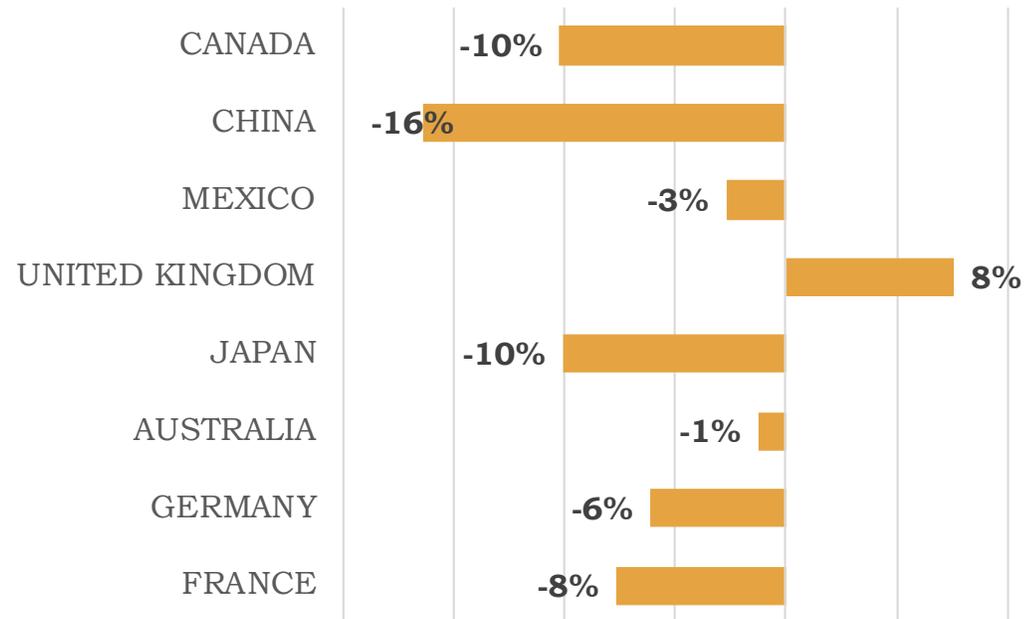


Source: National Travel and Tourism Office, Statistics Canada *Canada arrivals are YTD August 2019

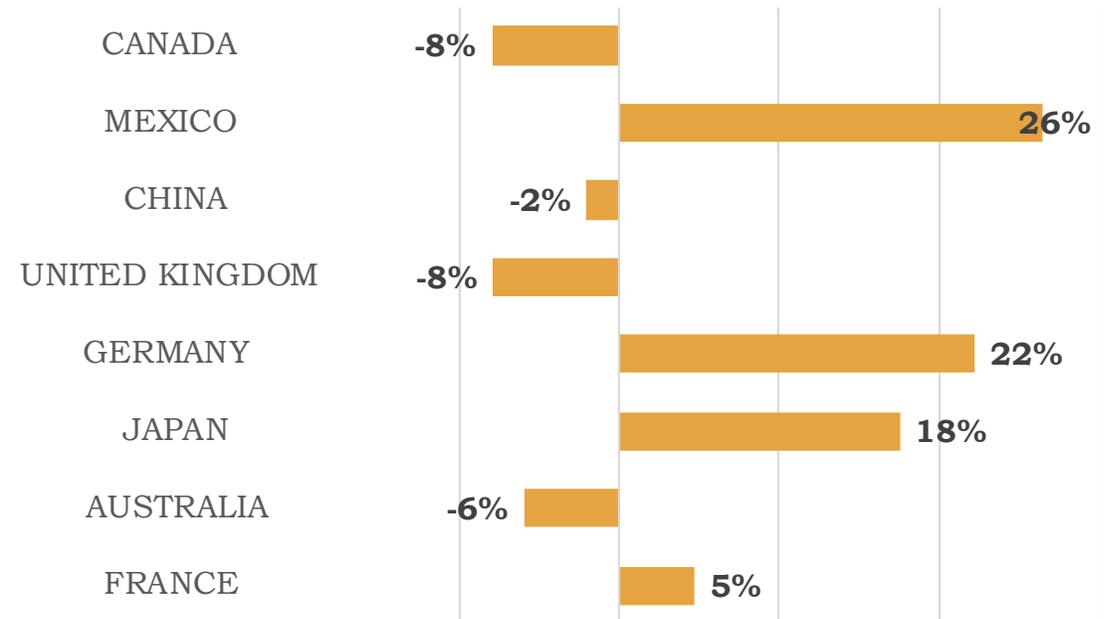
International Visa Card Spending

Phoenix & Central Region

Q1 2019 (January-March)



Q2 2019 (April-June)





Domestic Overnight Visitor Expenditures 2018

Phoenix & Central Region



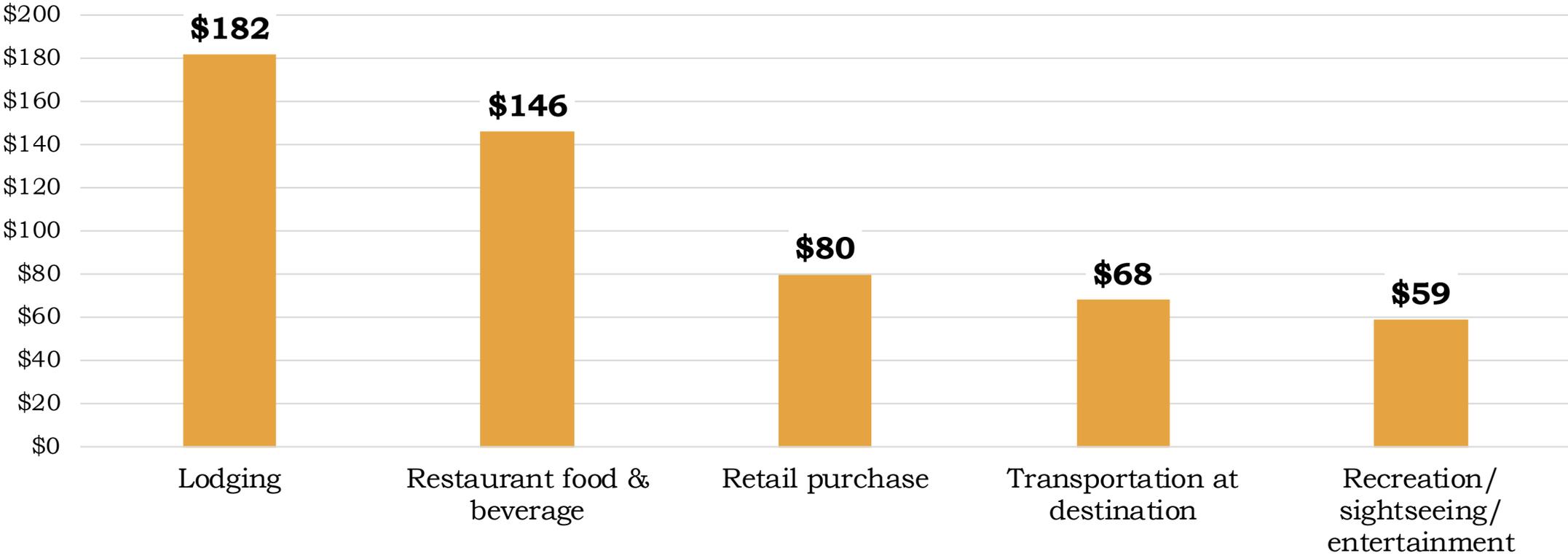
Average Per-Person Expenditures on Domestic Overnight Trips

Average Per Person \$206



Average Per-Party Expenditures on Domestic Overnight Trips

Average Per Party \$535



Source: Longwoods International



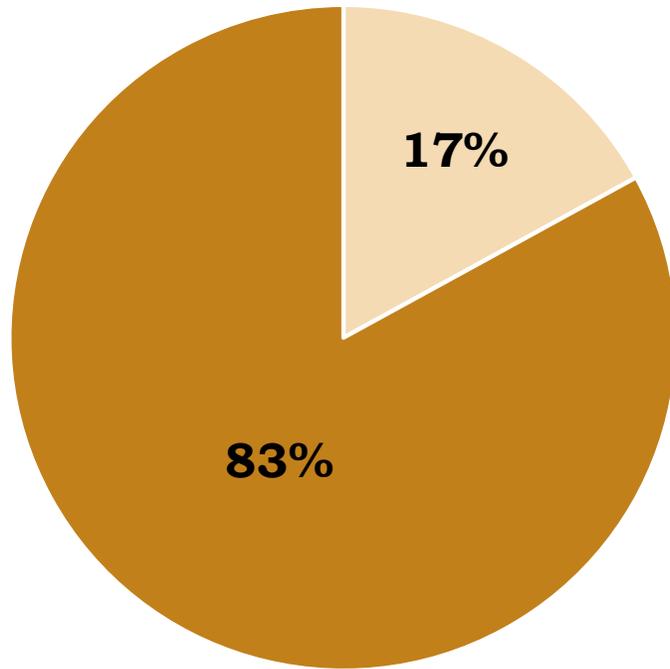
Domestic Overnight Visitor Profile 2018

Phoenix & Central Region

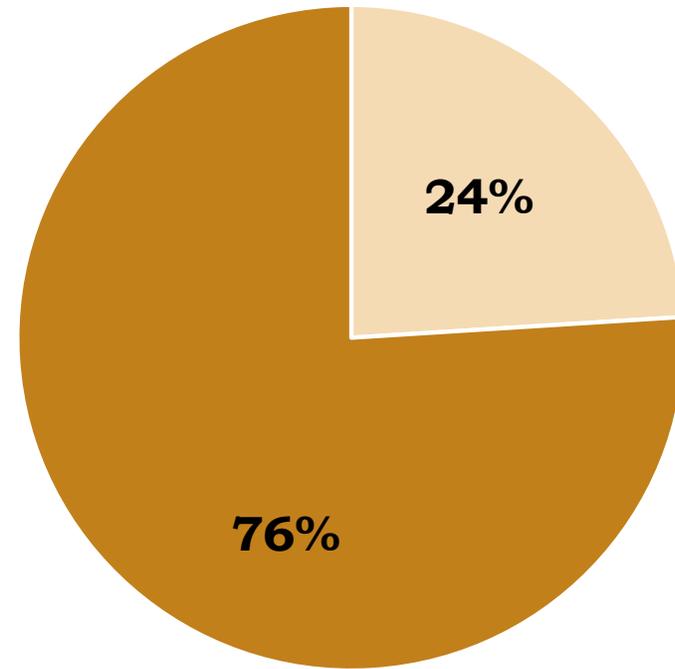


2018 Regional Domestic Visitor Profile

Phoenix & Central Region



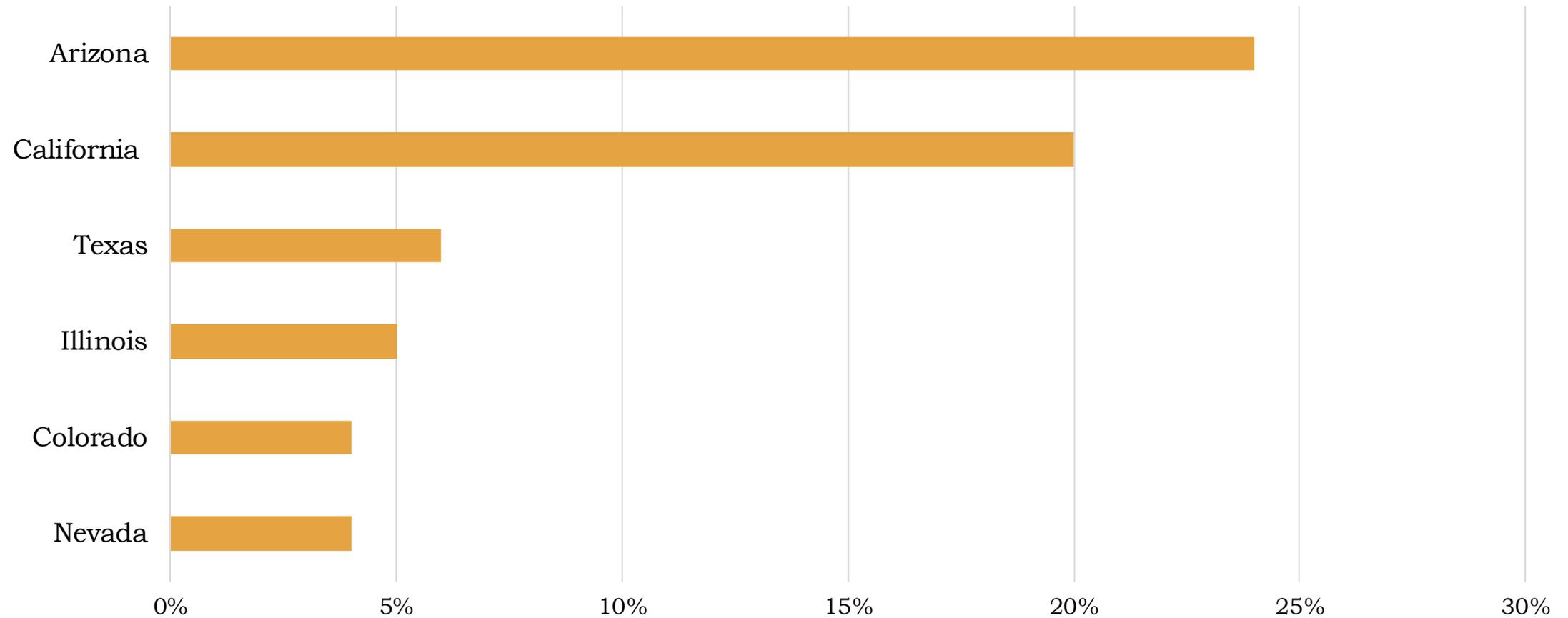
■ Business ■ Leisure



■ AZ Residents ■ Non-Residents

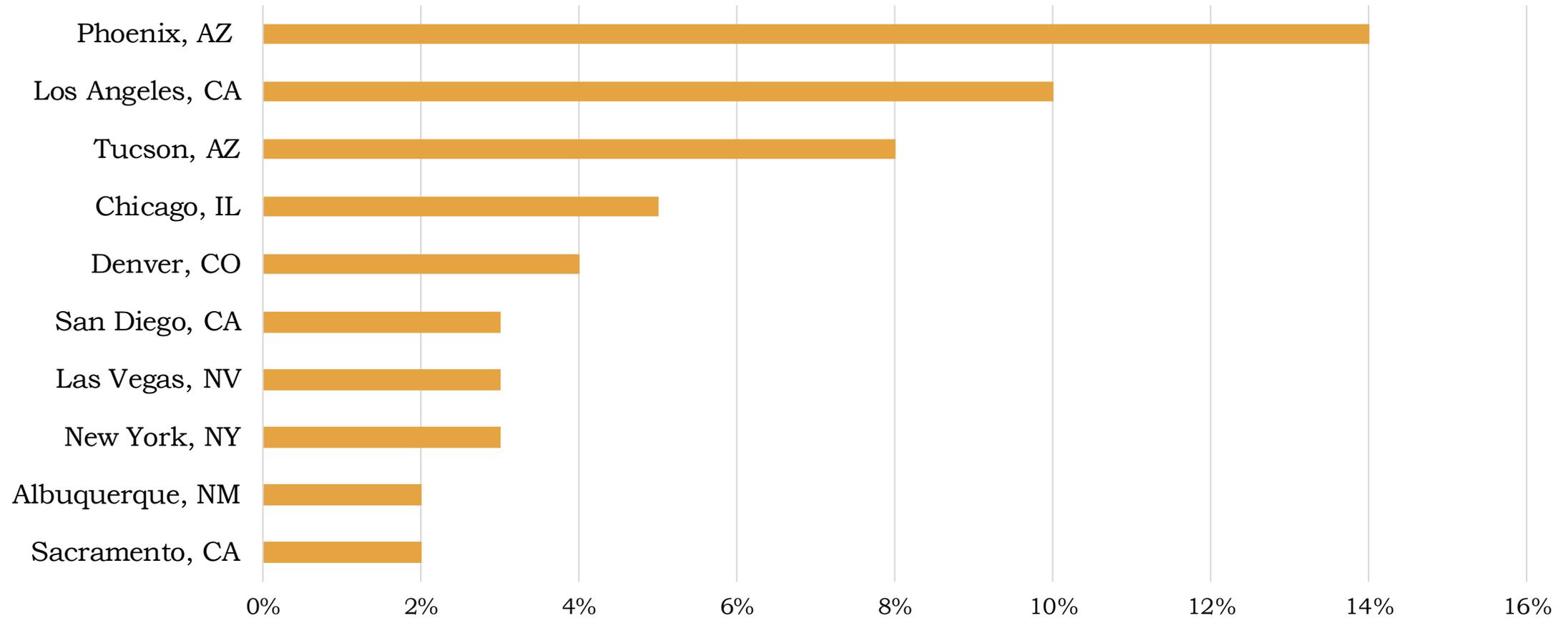
State Origin of Overnight Trips

Phoenix & Central Region



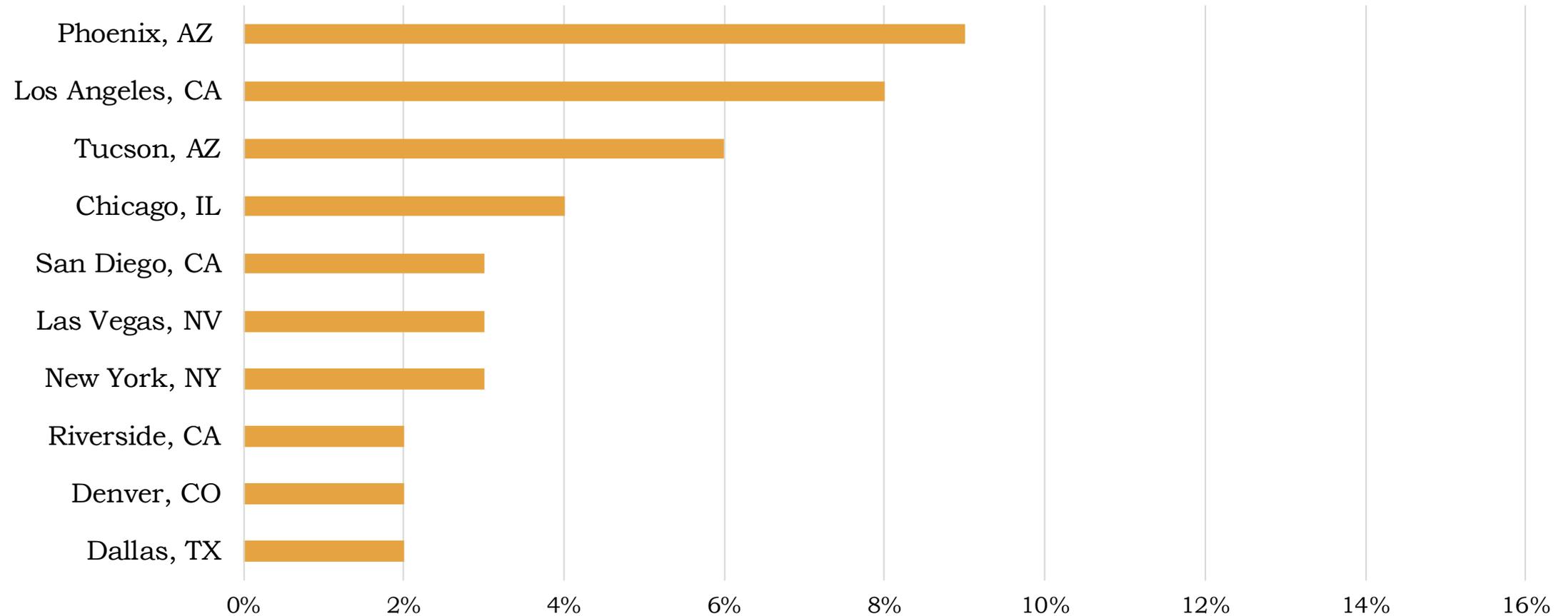
DMA Origin of Overnight Trip

Phoenix & Central Region



MSA Origin of Overnight Trip

Phoenix & Central Region

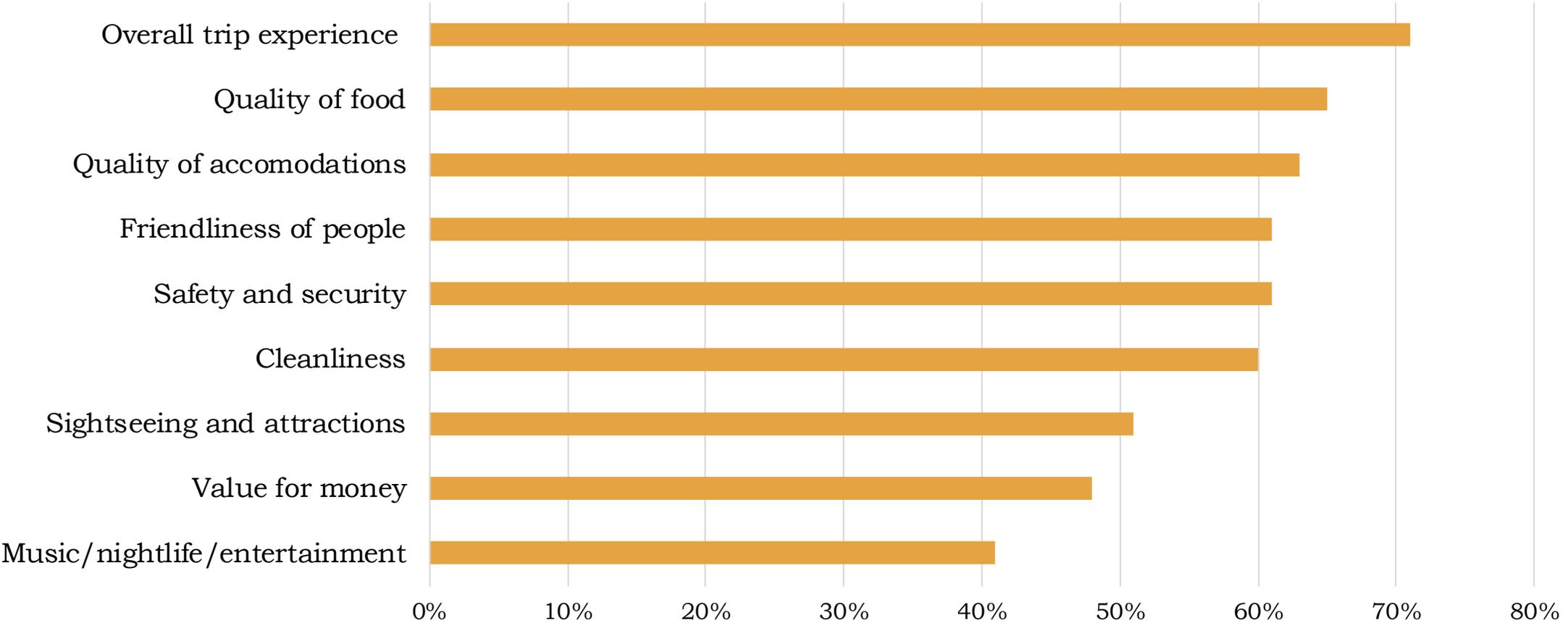


Source: Longwoods International



Satisfaction with Trip - % Very Satisfied

Phoenix & Central Region



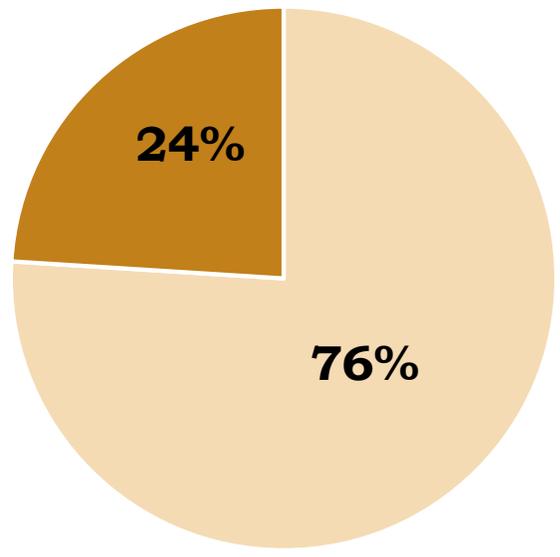
Source: Longwoods International



Past Visitation

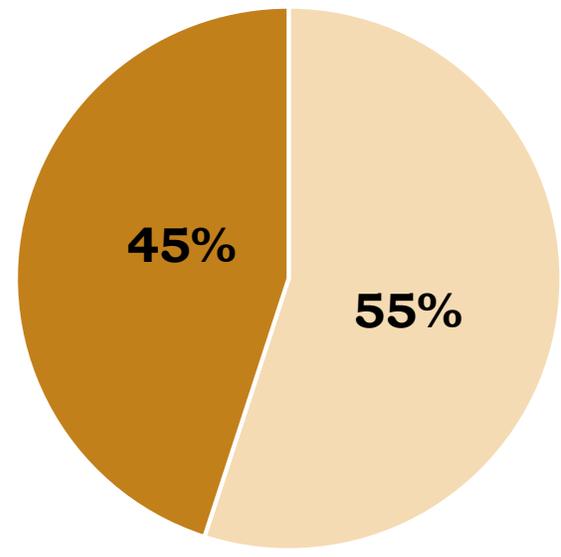
Phoenix & Central Region

Have you ever visited the Phoenix & Central Region before?



■ Yes ■ No

Have you visited the Phoenix & Central Region in the past 12 months?

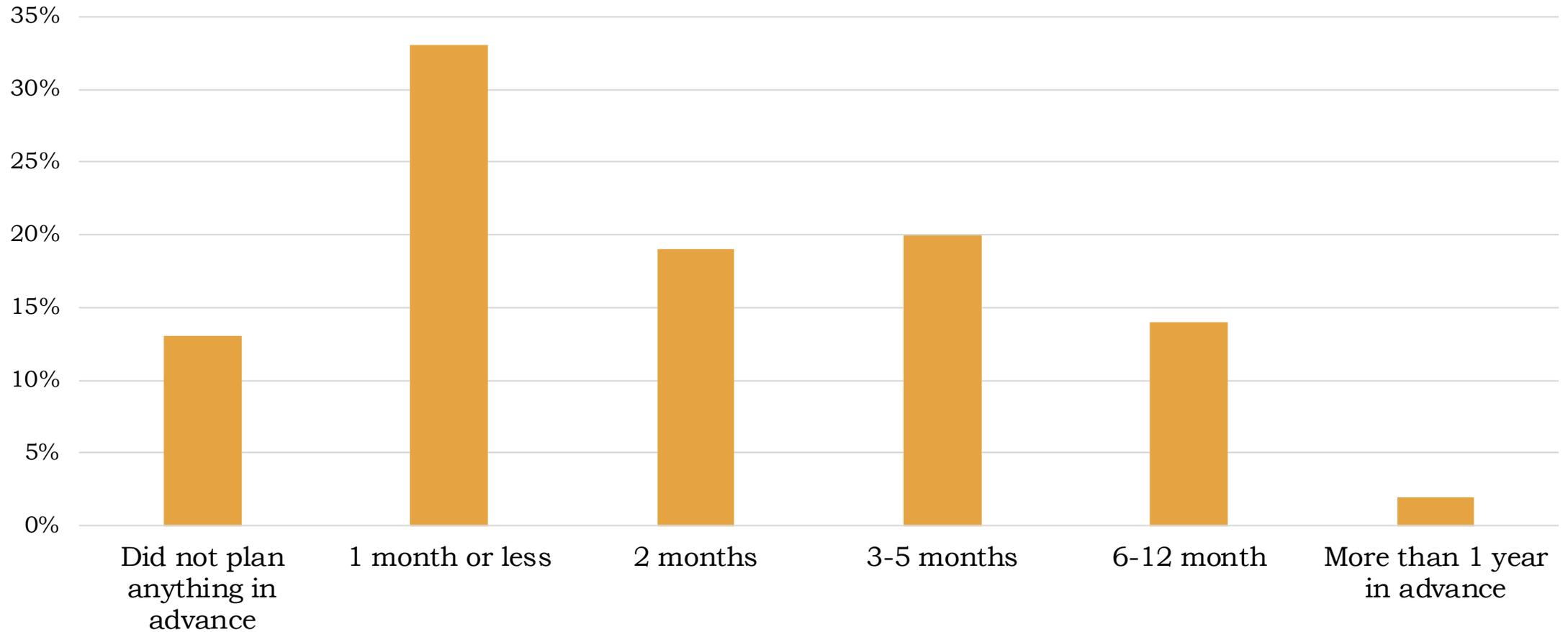


■ Yes ■ No



Length of Trip Planning

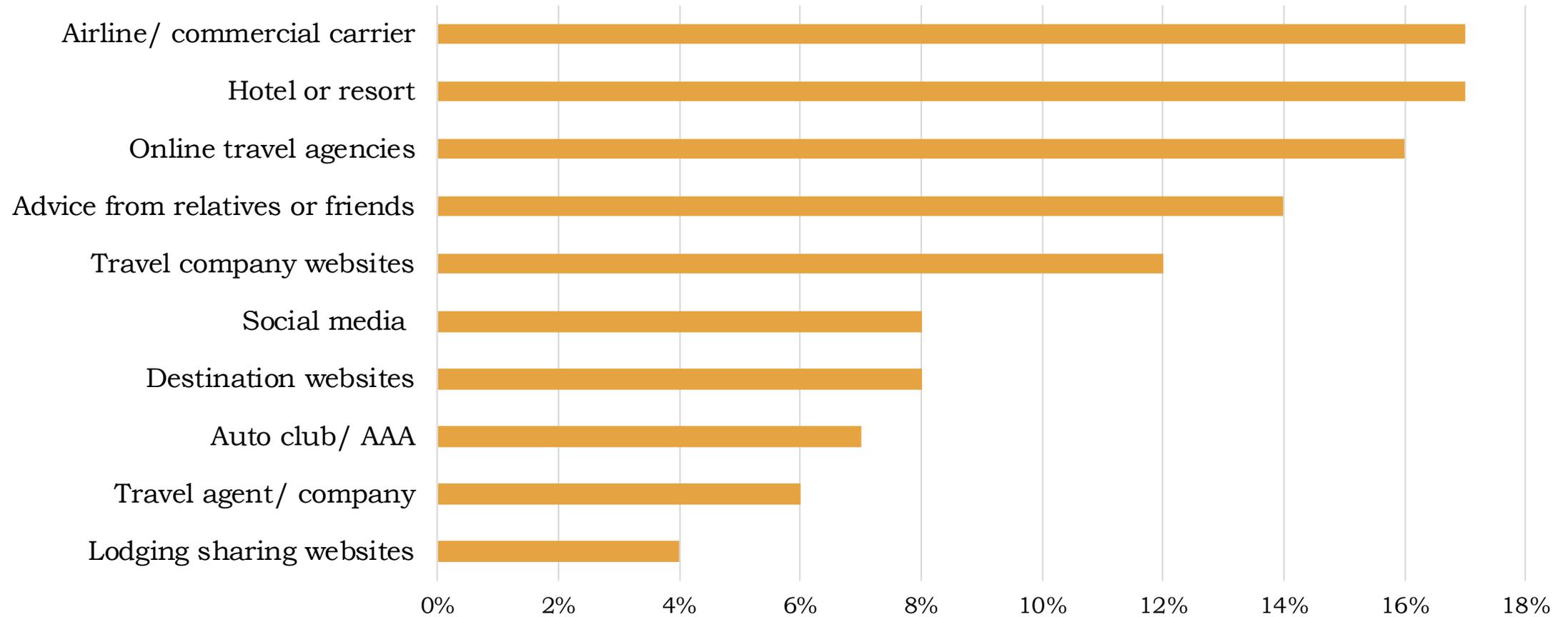
Phoenix & Central Region





Trip Planning Information Sources

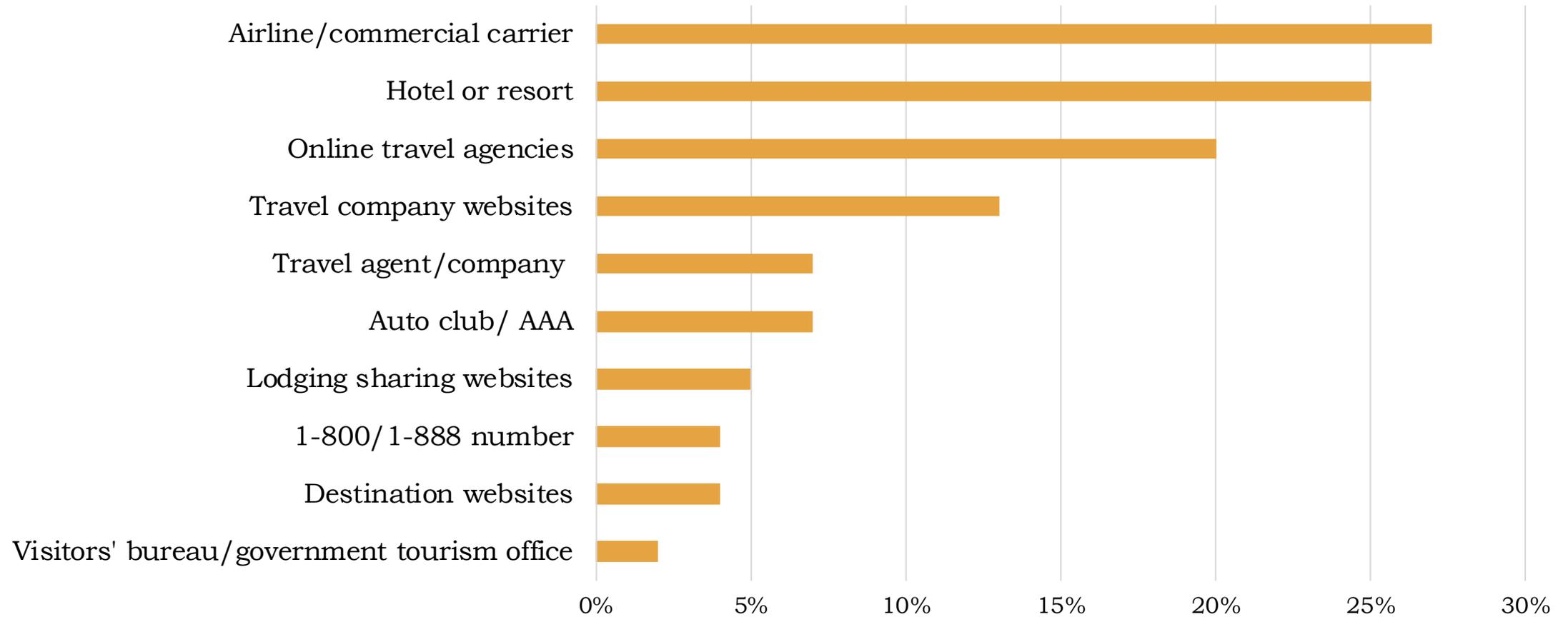
Phoenix & Central Region





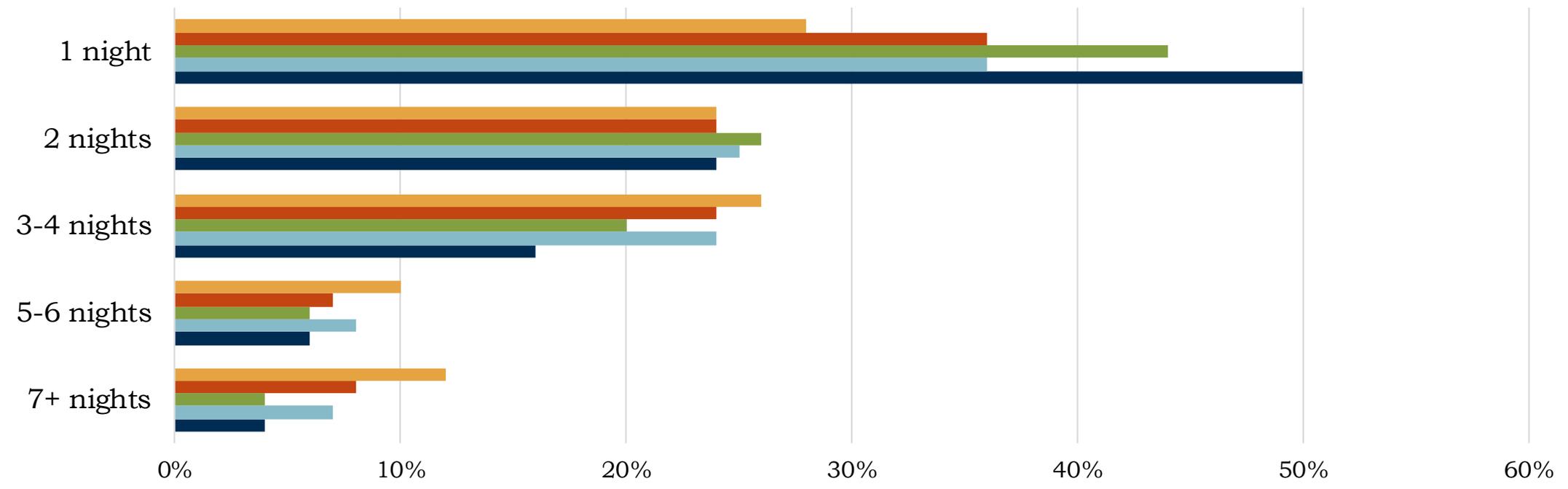
Method of Booking

Phoenix & Central Region



Number of Nights Spent in Each Region

Phoenix & Central



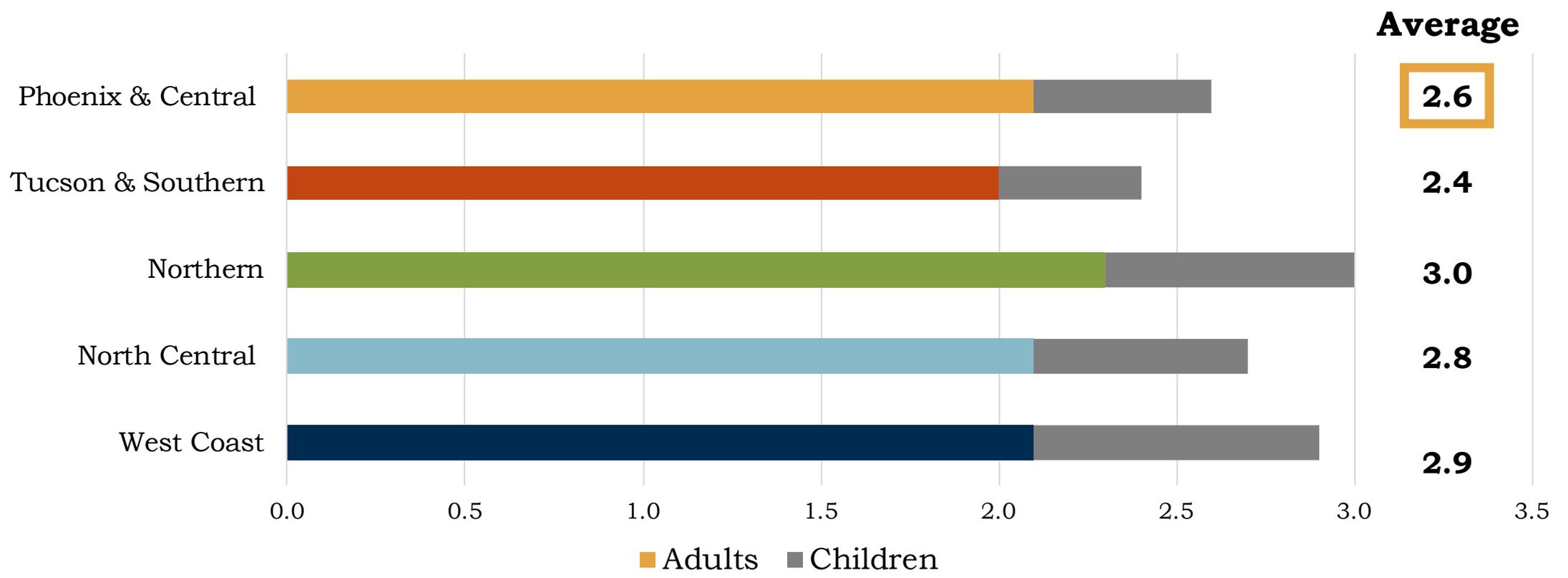
| Average | Phoenix & Central | Tucson & Southern | Northern | North Central | West Coast |
|---------|-------------------|-------------------|---------------|---------------|---------------|
| | 3.7 | 3.1 | 2.5 | 2.7 | 2.3 |
| | Nights | Nights | Nights | Nights | Nights |

Source: Longwoods International, 2018



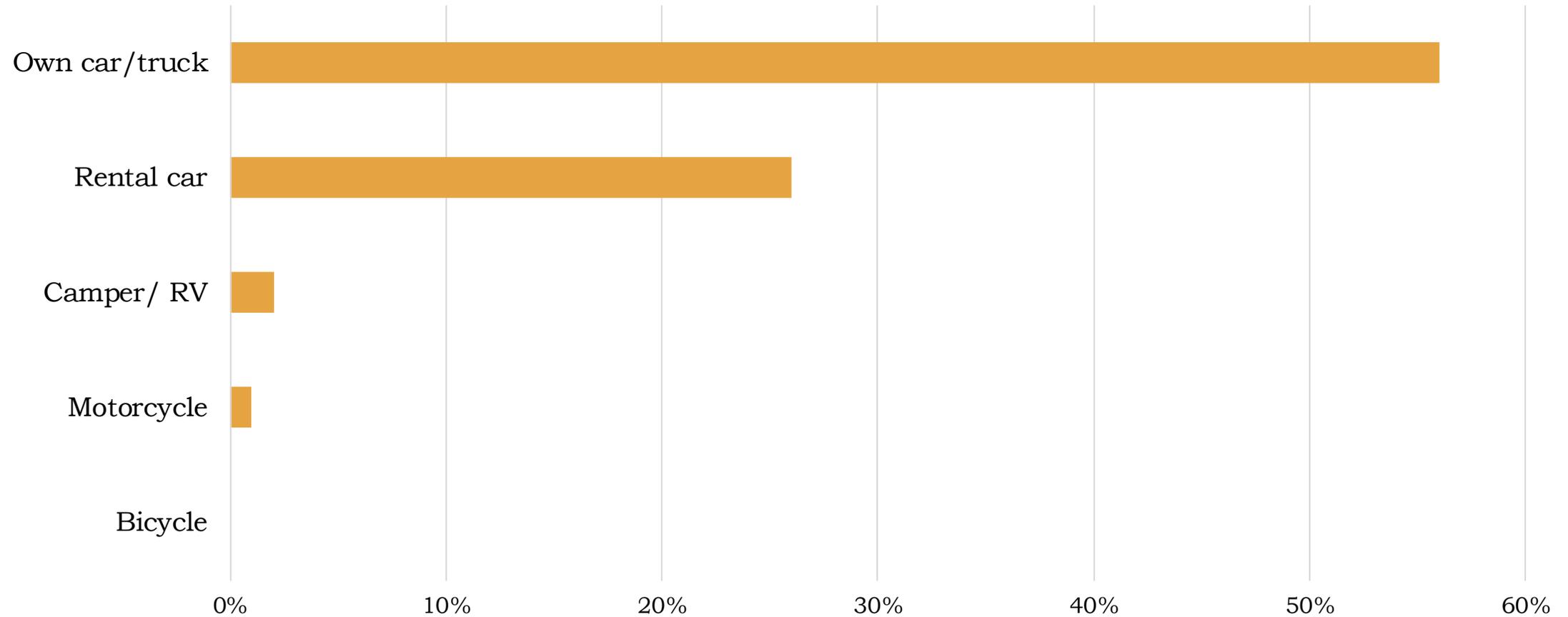
Size of Travel Party

Phoenix & Central Region



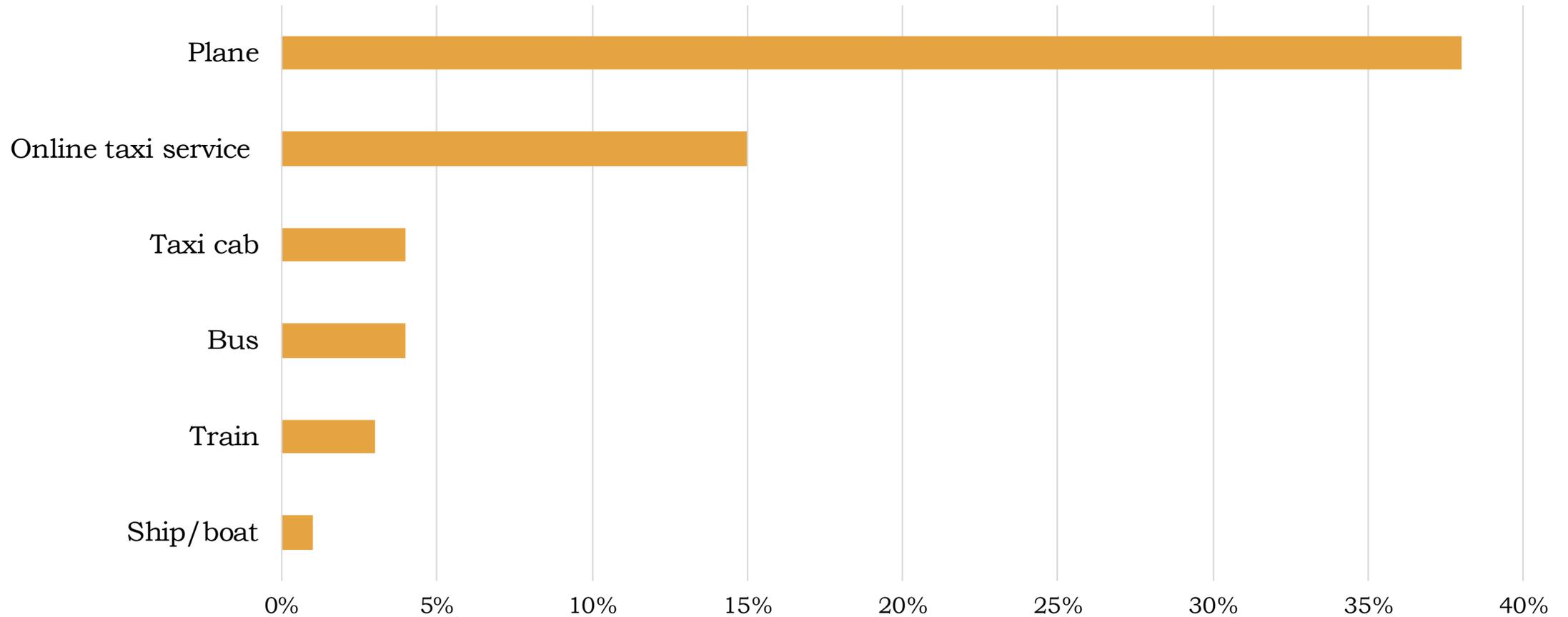
Transportation – Private Vehicles

Phoenix & Central Region



Transportation – Commercial Vehicles

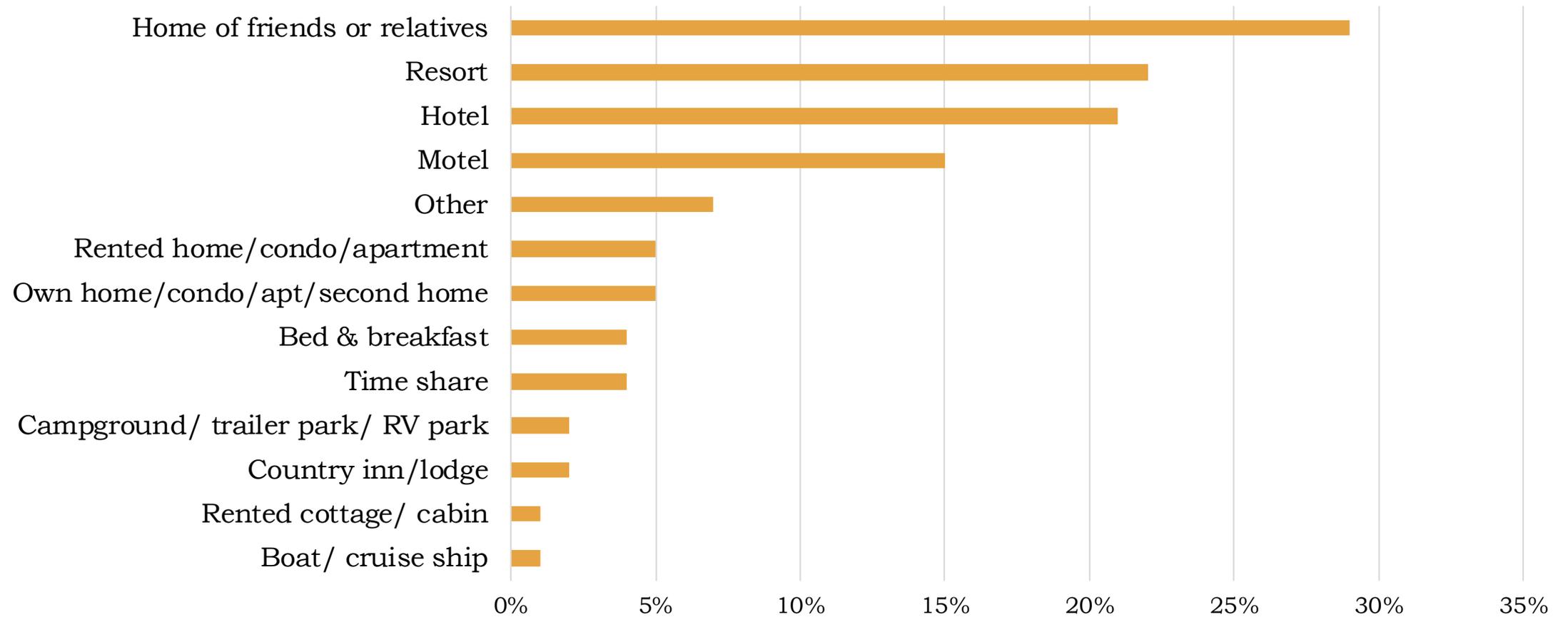
Phoenix & Central Region





Accommodation

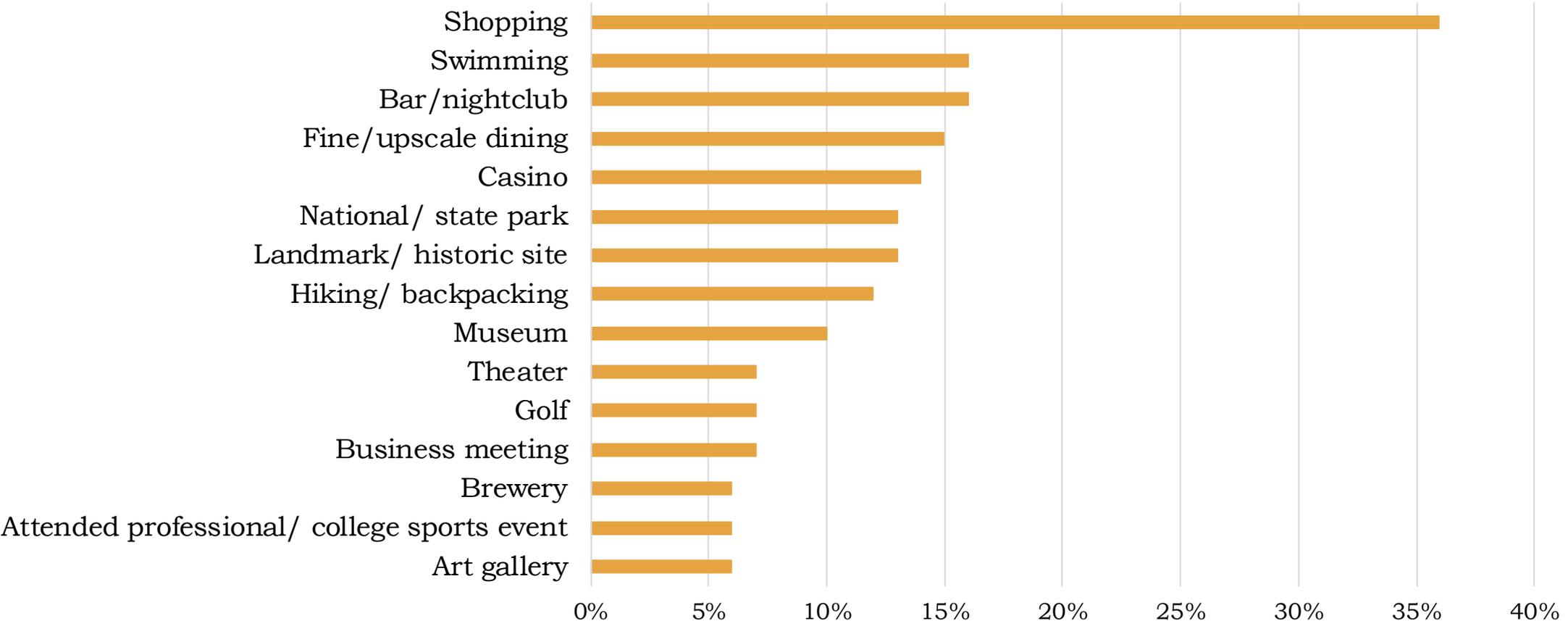
Phoenix & Central Region





Activities and Experiences

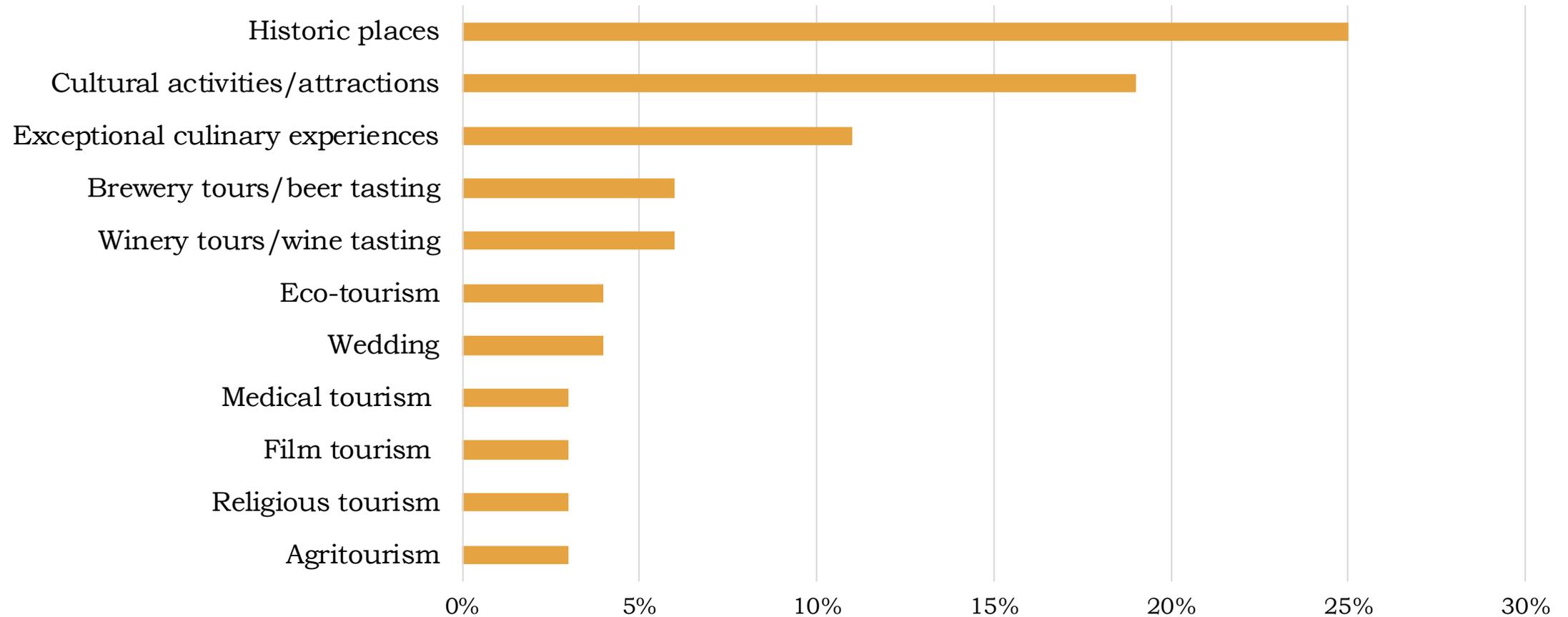
Phoenix & Central Region



Source: Longwoods International

Activities of Special Interest

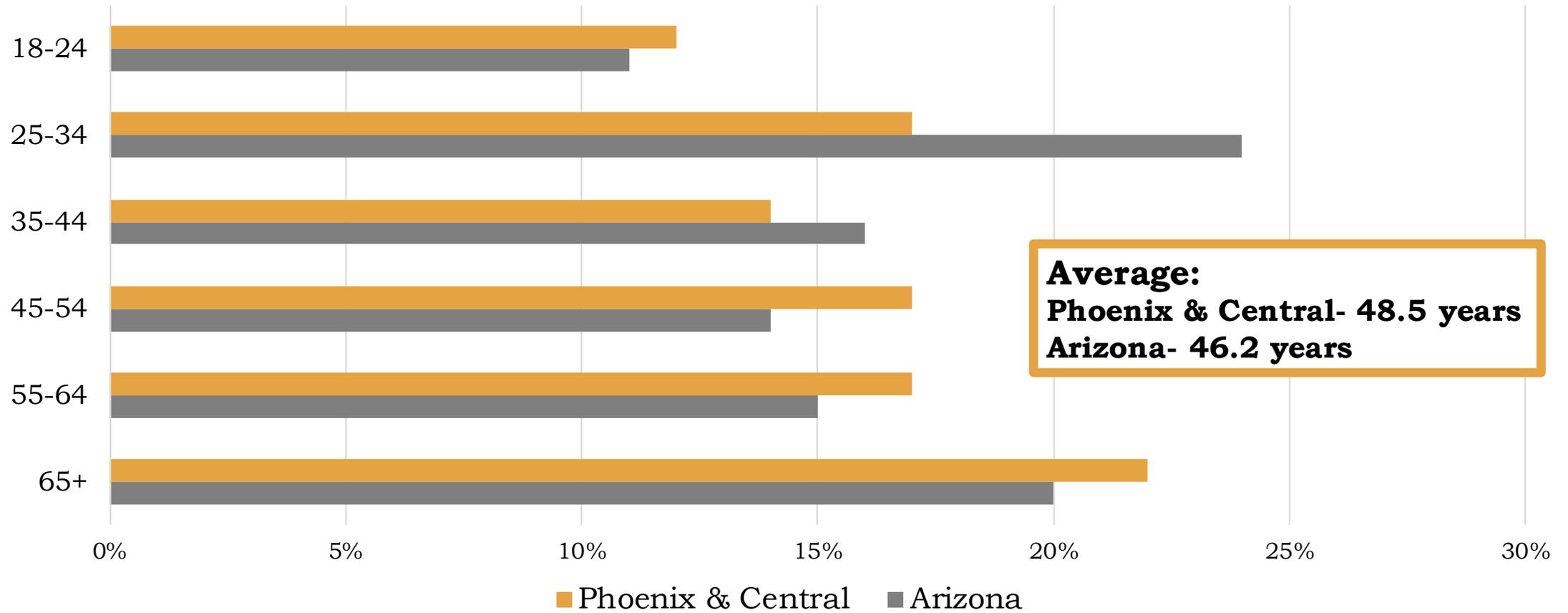
Phoenix & Central Region





Age

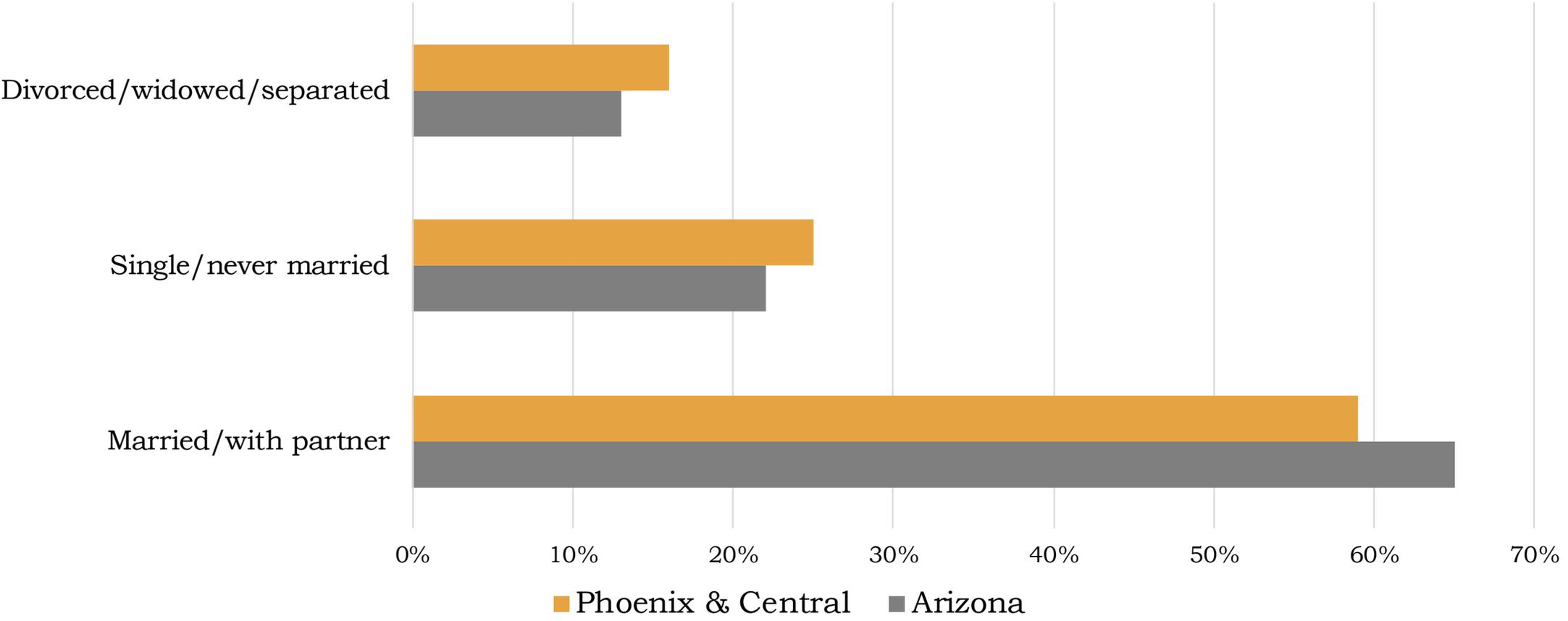
Phoenix & Central Region





Marital Status

Phoenix & Central Region

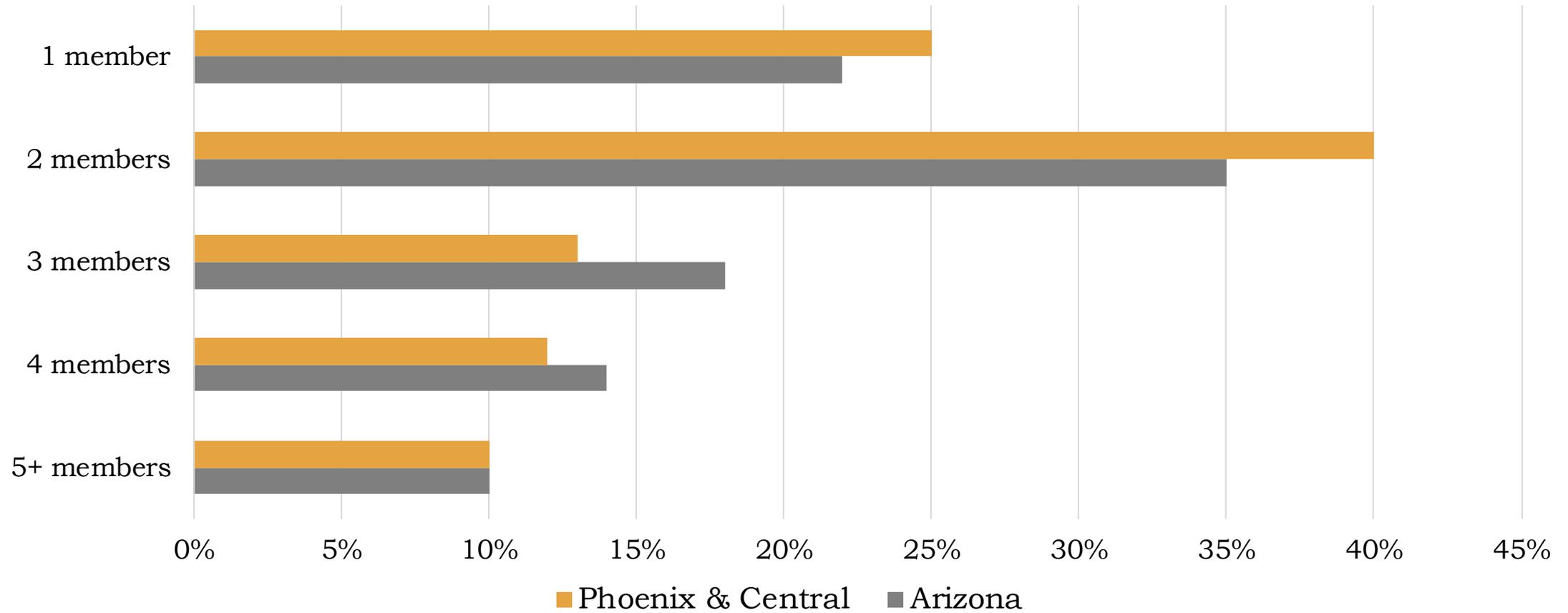


Source: Longwoods International



Household Size

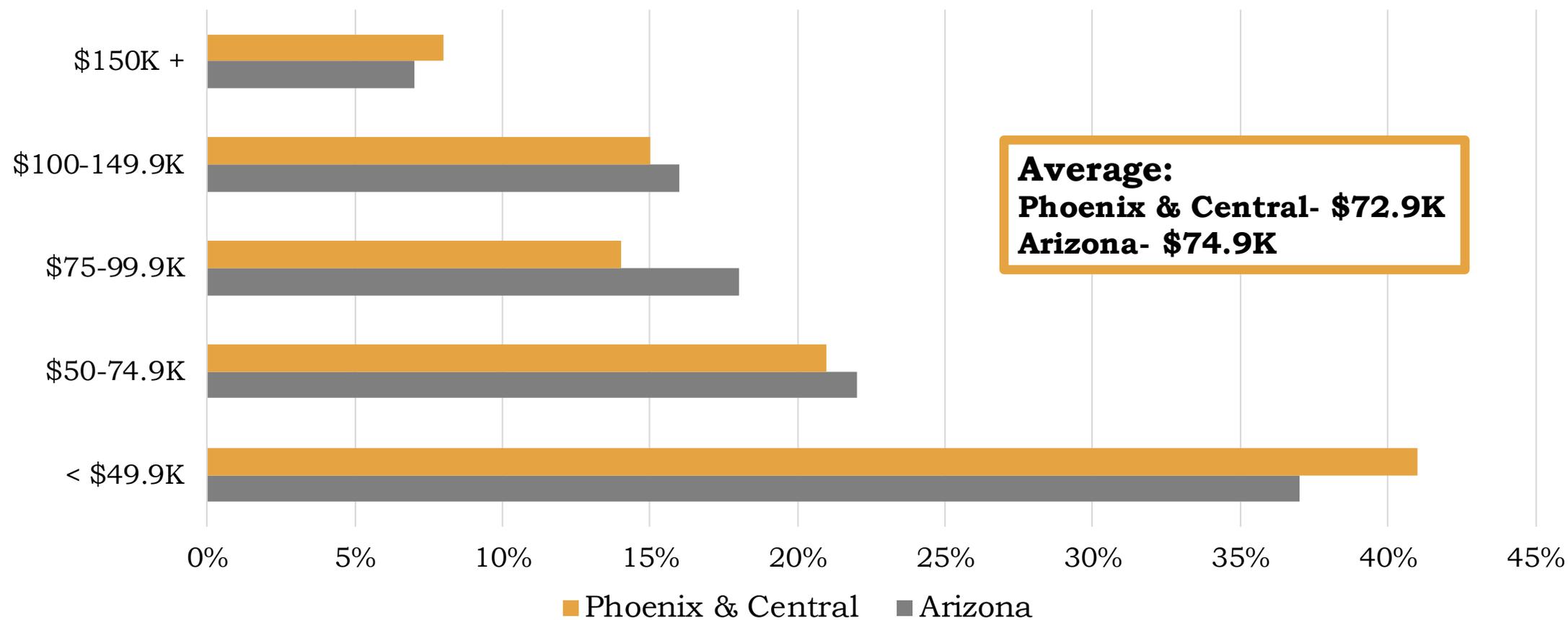
Phoenix & Central Region





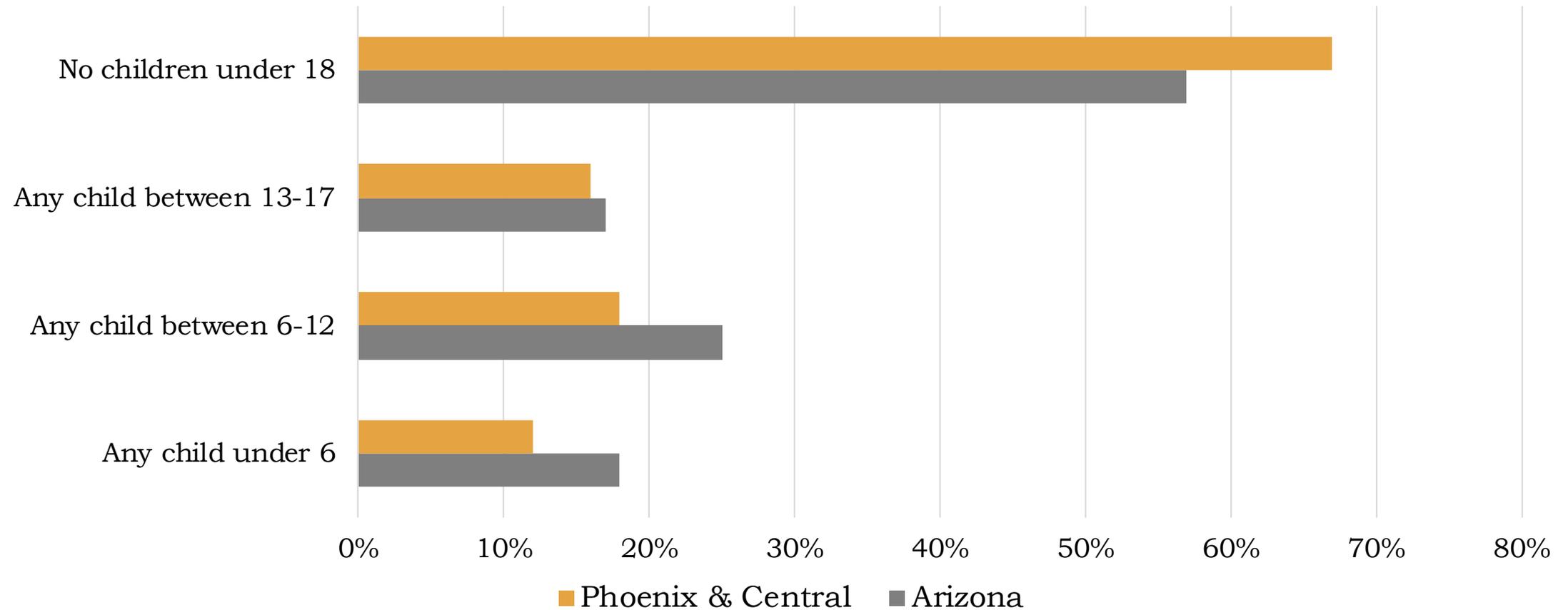
Household Income

Phoenix & Central Region



Children in Household

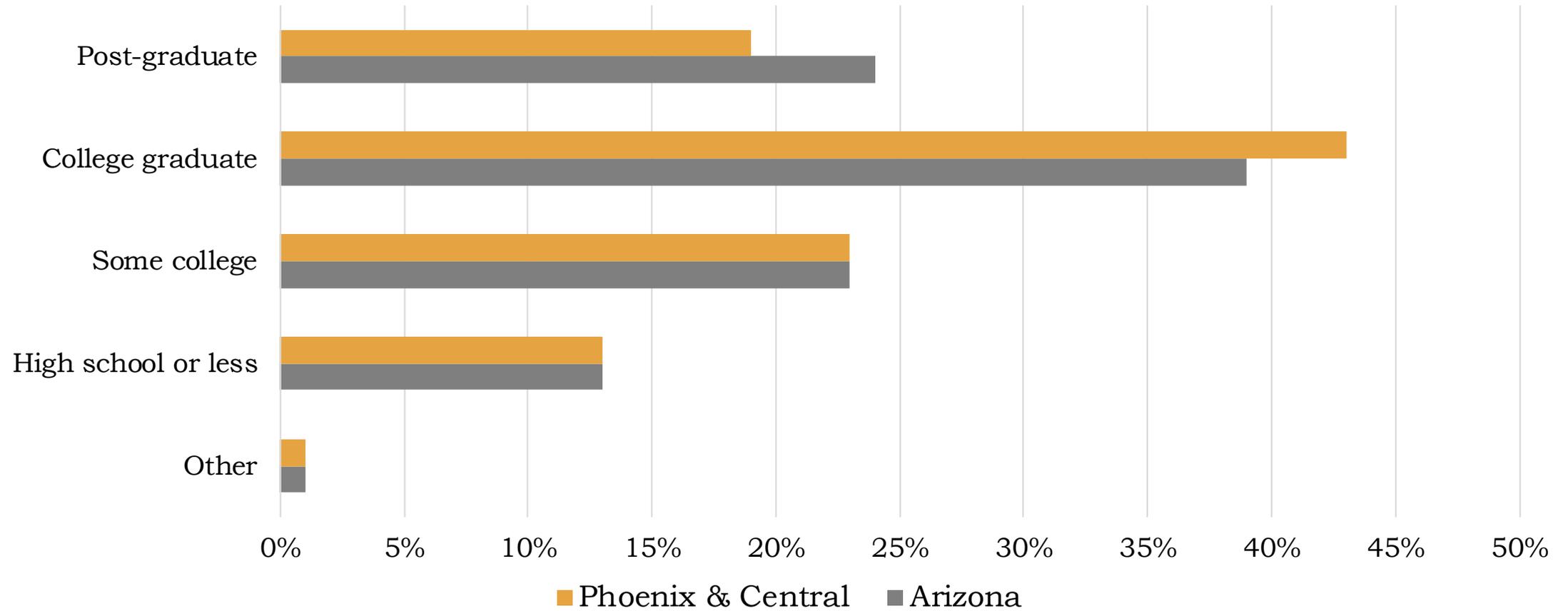
Phoenix & Central Region





Education

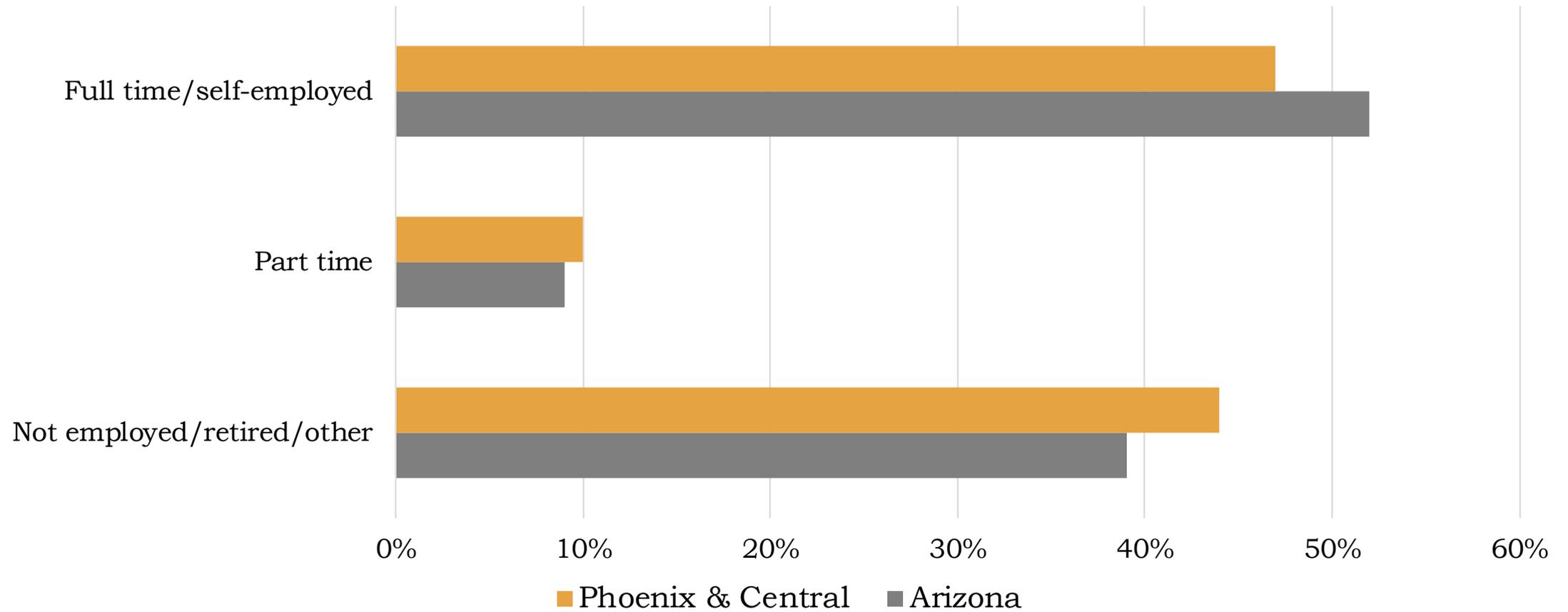
Phoenix & Central Region





Employment

Phoenix & Central Region



Stay Connected



Presentation slides available at:

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

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