

Phoenix & Central Region 2018 Year-End Data Review

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AOT Research Staff



Colleen Floyd
Director of Research
cfloyd@tourism.az.gov
602-364-3716



Kari Roberg
Senior Research Manager
kroberg@tourism.az.gov
602-364-4158



Lena Allen
Marketing & Research Manager
lallen@tourism.az.gov
602-364-3718

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



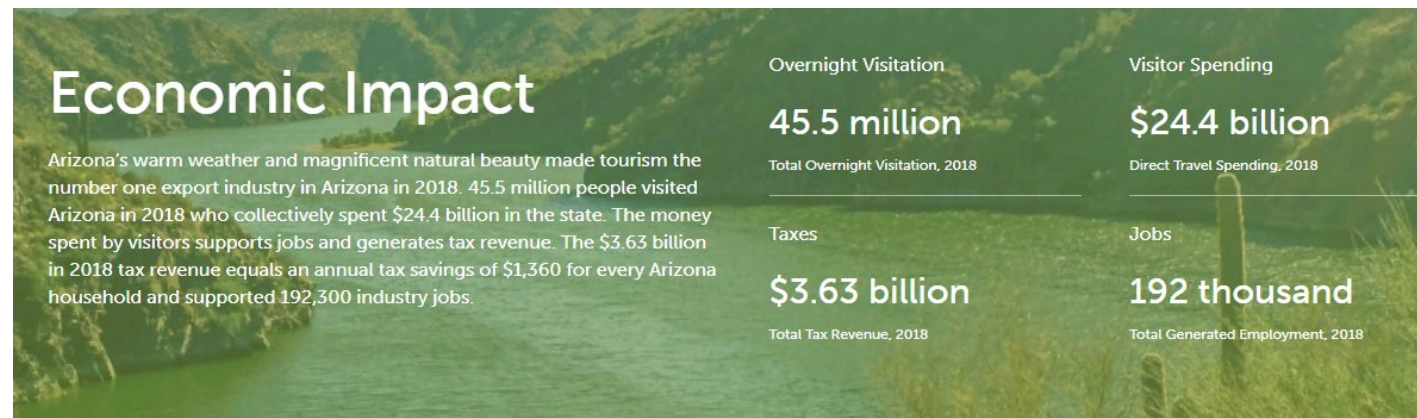
Economic Impact of Travel 2018

Phoenix & Central 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 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

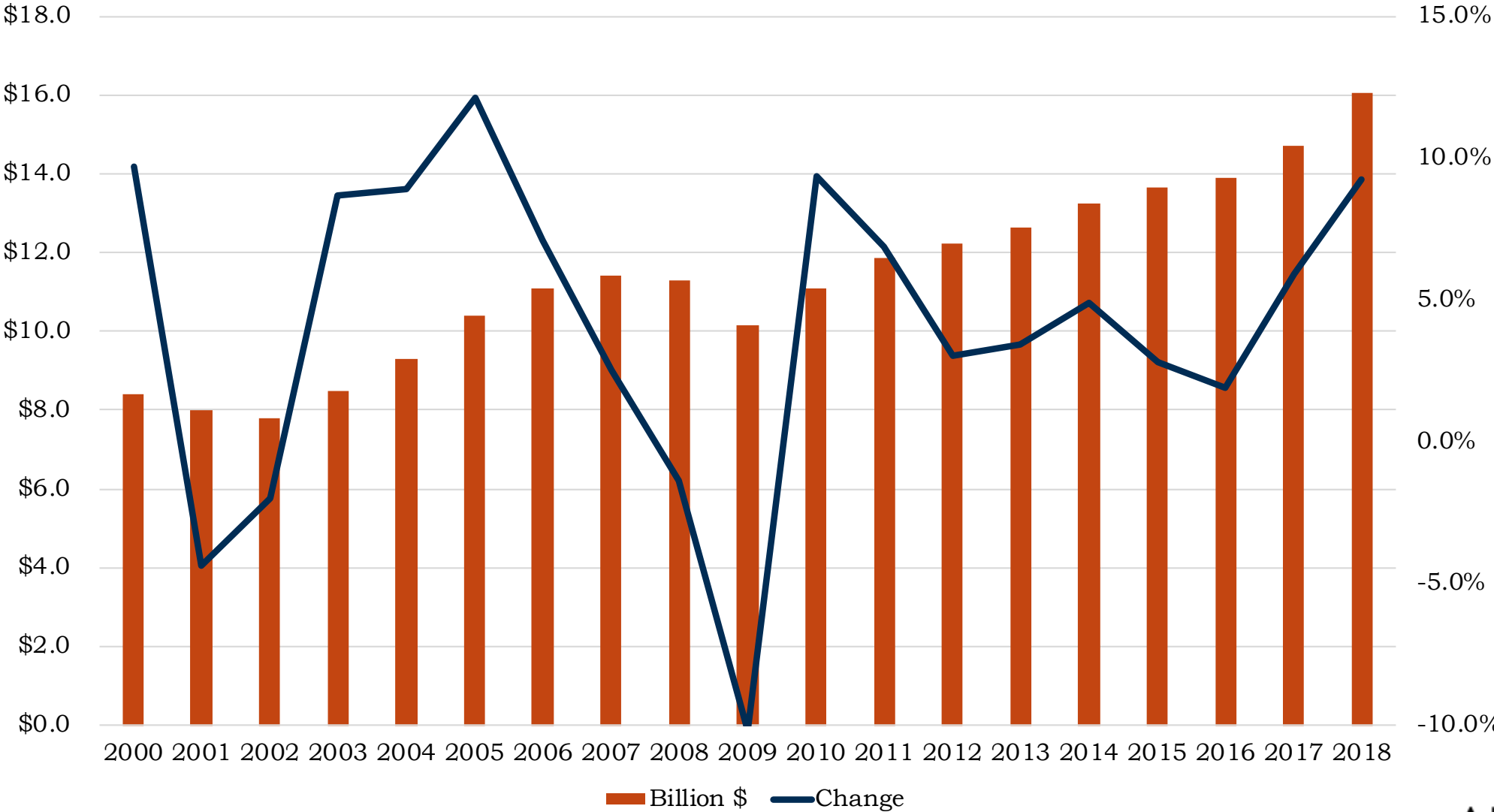
Phoenix & Central Region

	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

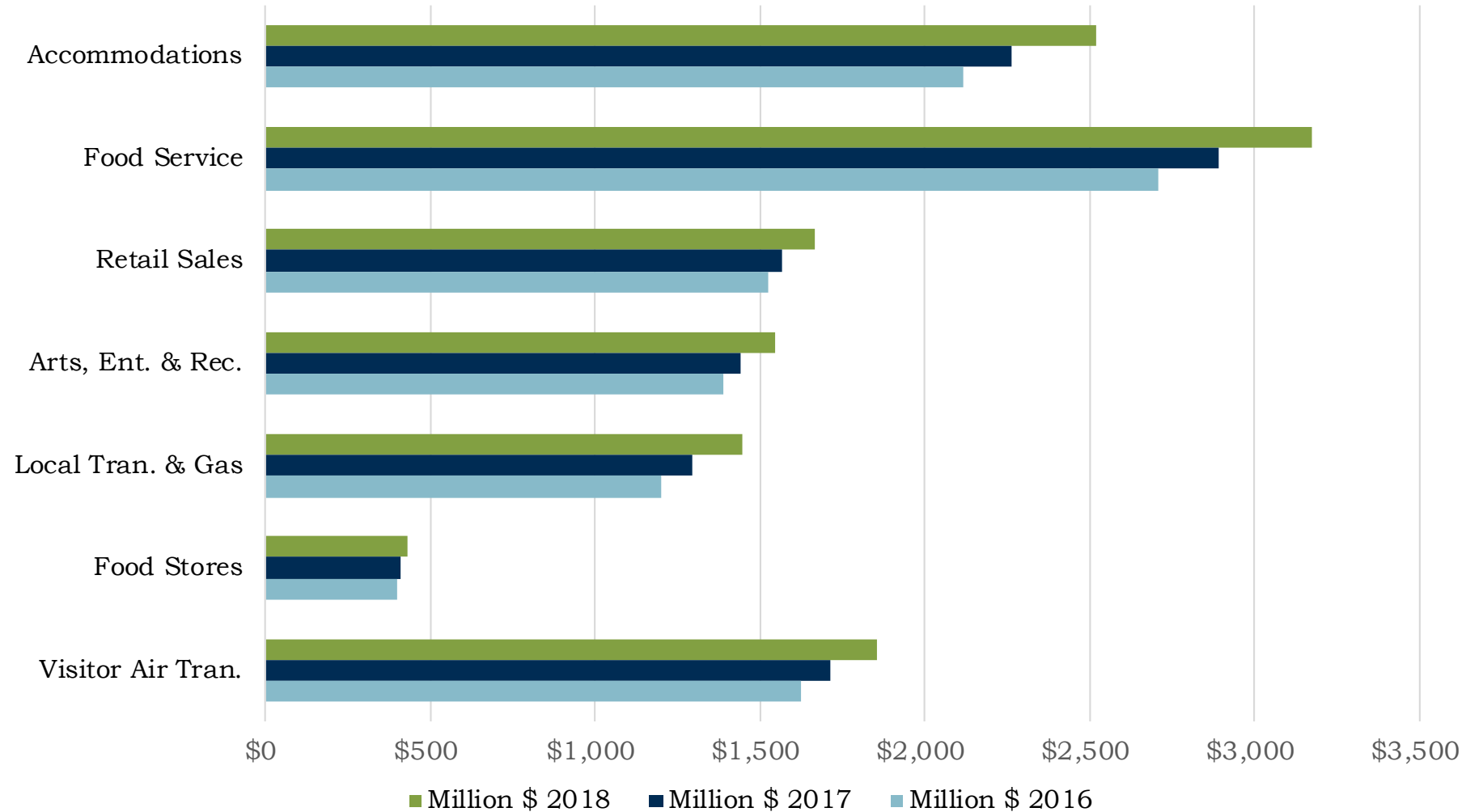
Phoenix & Central Region



Source: Dean Runyan Associates

Spending by Commodity Purchased

Phoenix & Central Region

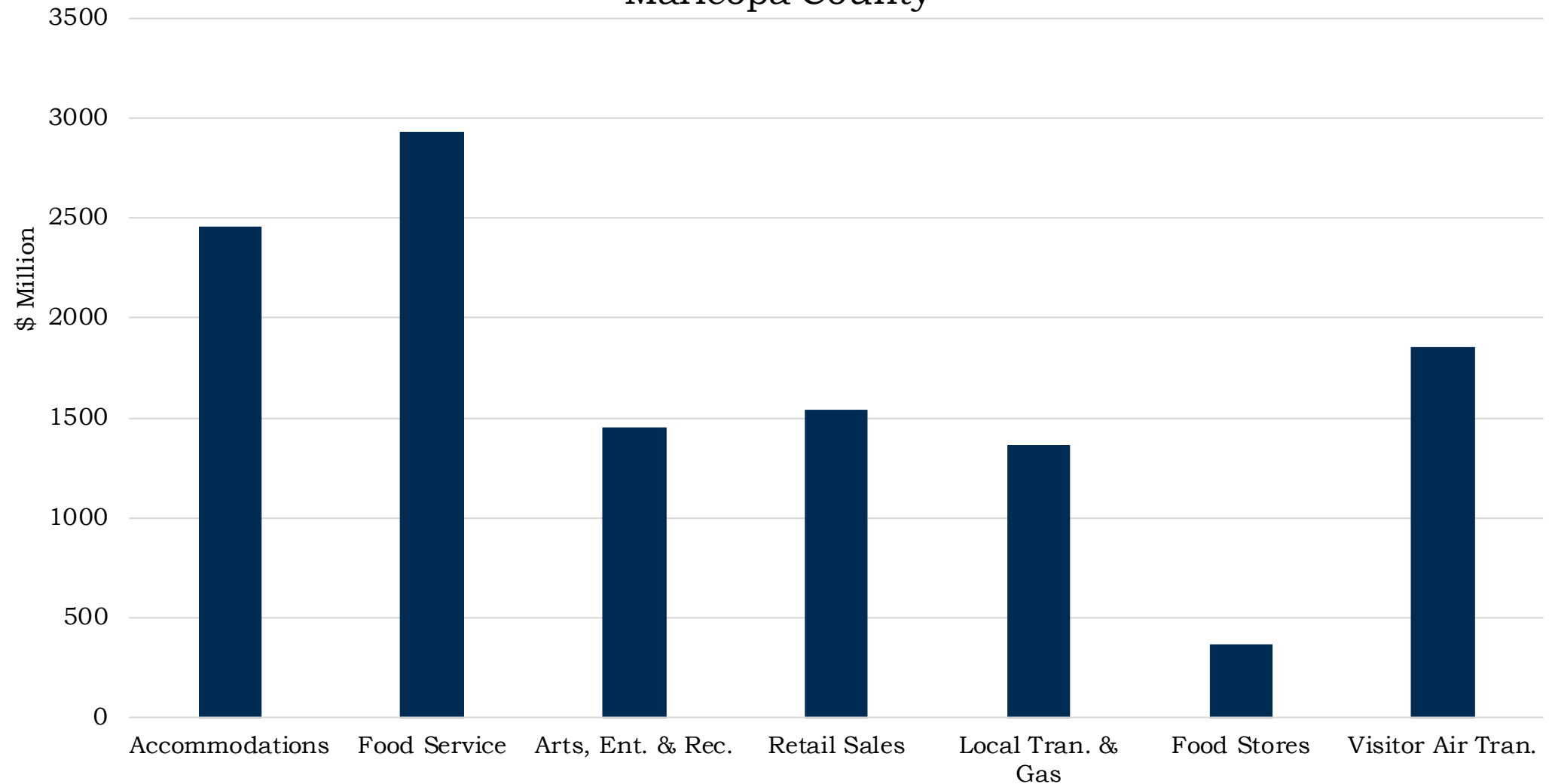


Source: Dean Runyan Associates



Spending by Commodity Purchased

Maricopa County

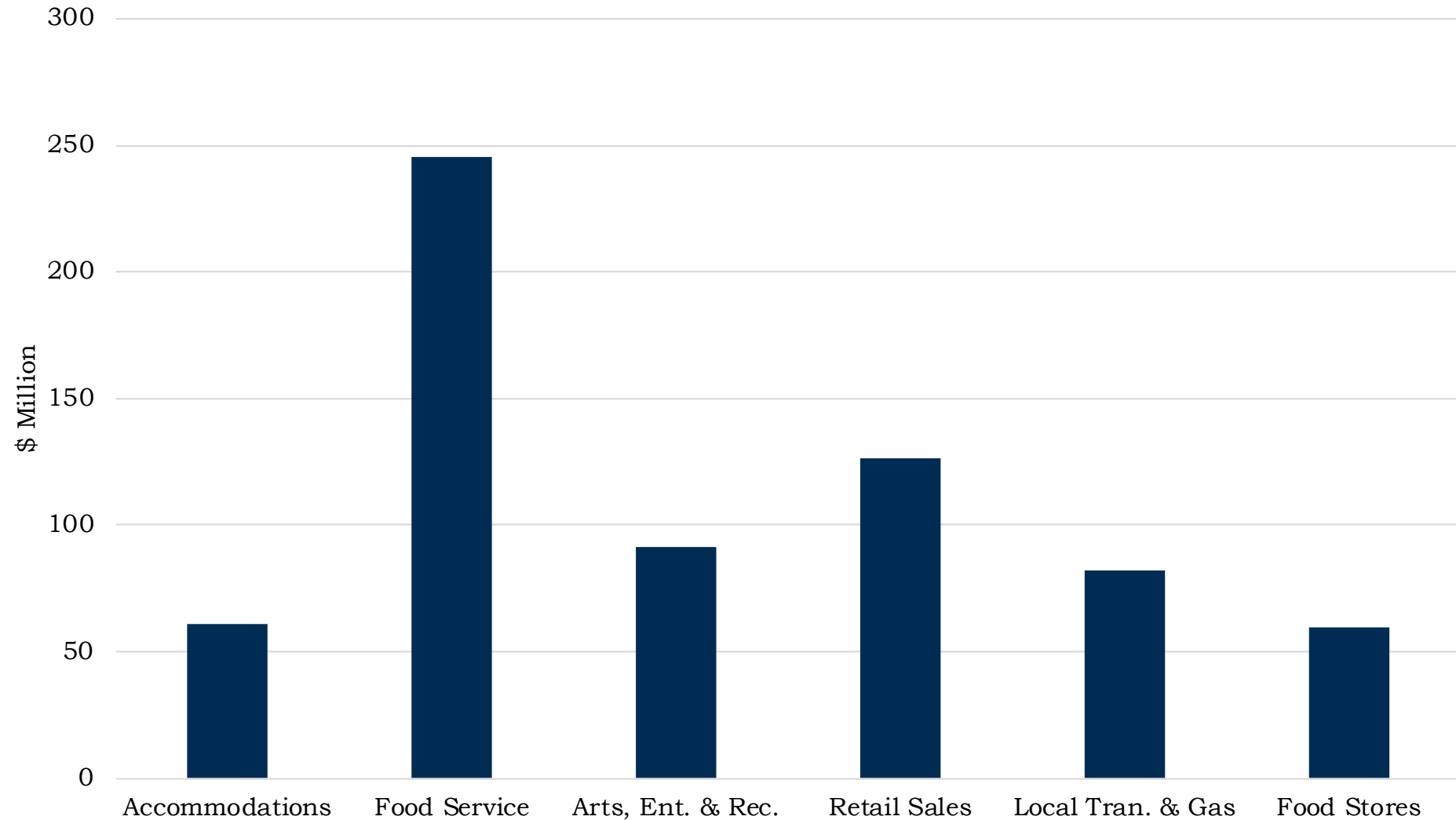


Source: Dean Runyan Associates, 2018



Spending by Commodity Purchased

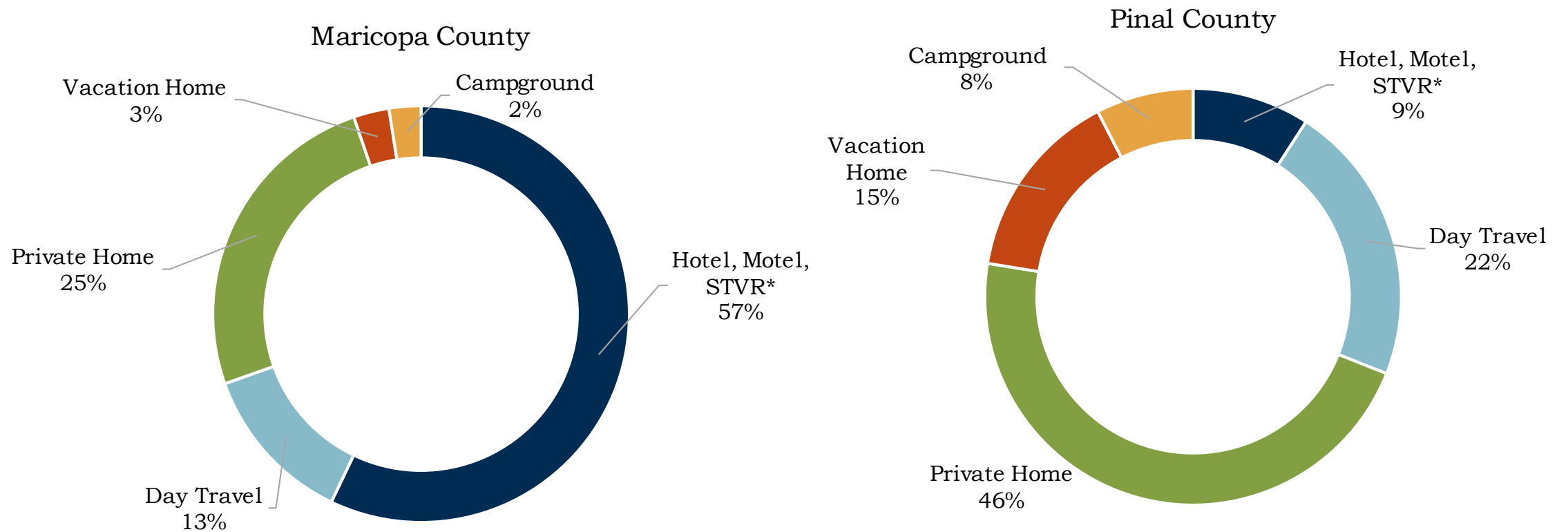
Pinal County



Source: Dean Runyan Associates, 2018

Spending by Type of Accommodation

Phoenix & Central Region





2019 Tourism Indicators To-Date

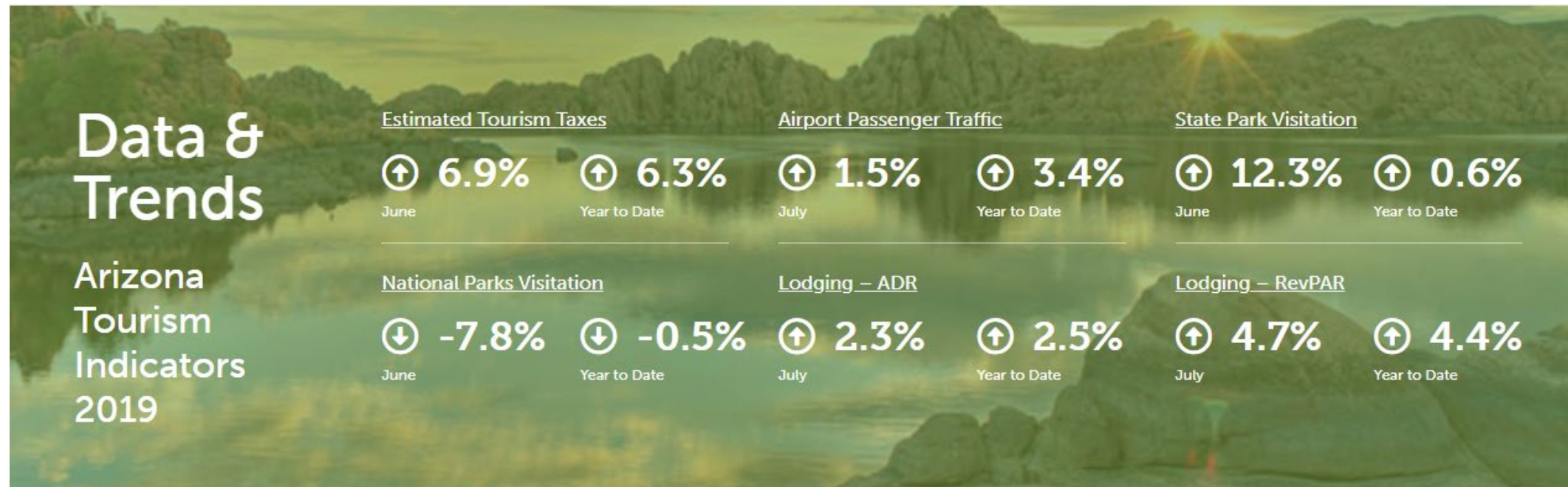
Phoenix & Central Region





Tourism Indicators

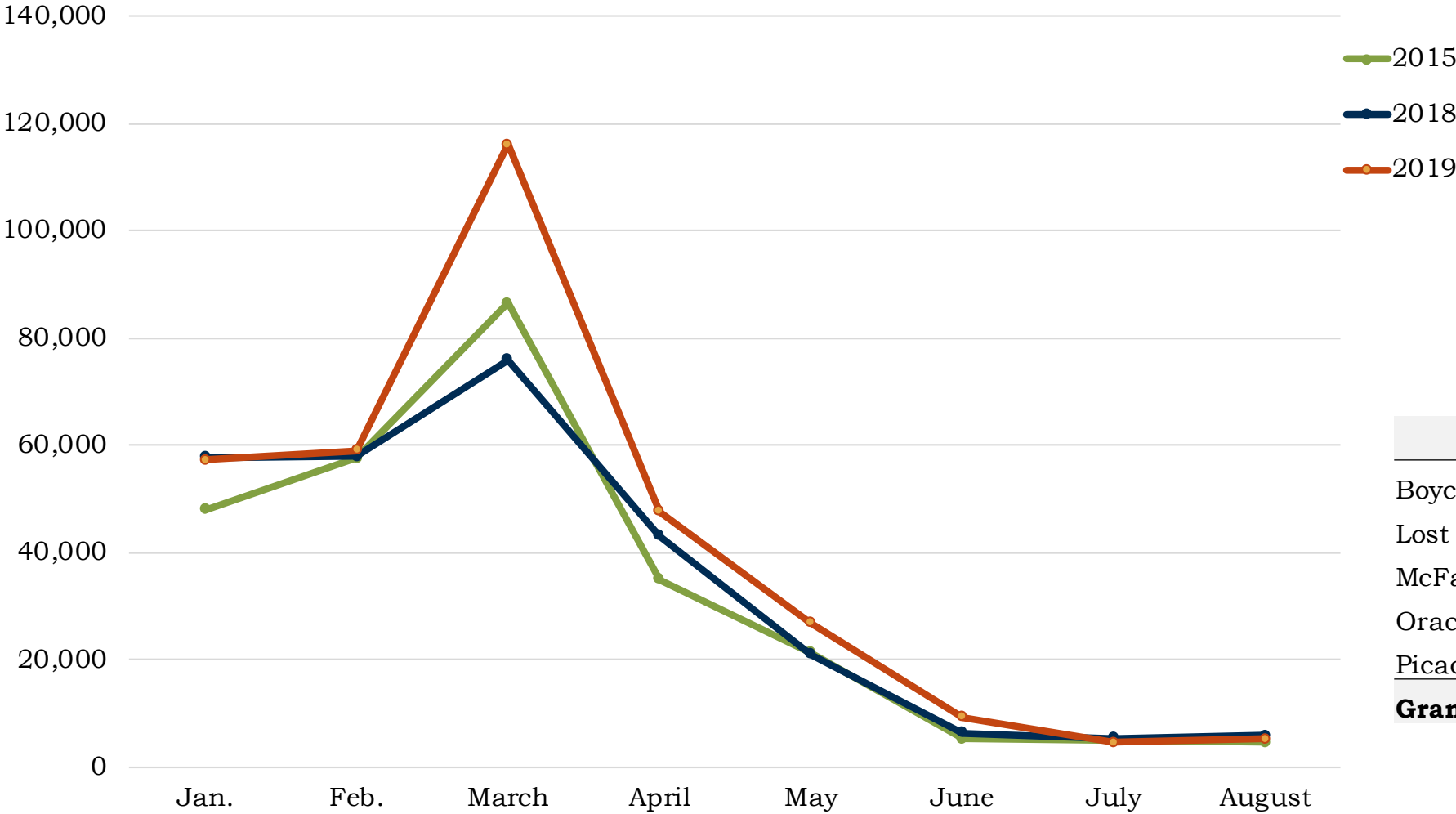
<http://tourism.az.gov/data-trends/>





State Park Visitation

Phoenix & Central Region



Jan.-August YTD Visitation

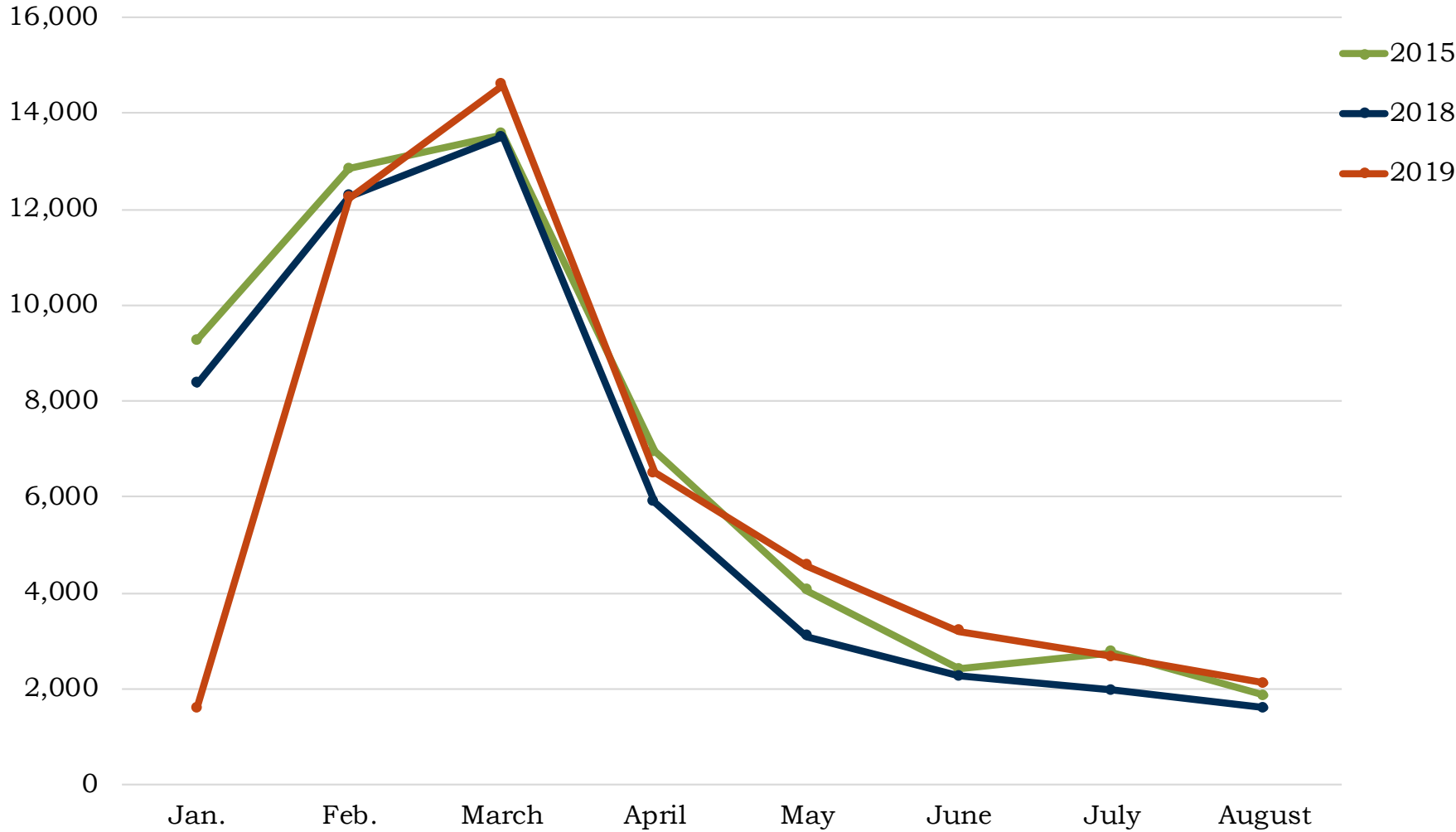
	2019 YTD
Boyce Thompson ASP	66,319
Lost Dutchman SP	147,636
McFarland SHP	5,106
Oracle SP	10,753
Picacho Peak SP	96,451
Grand Total	326,265

Source: Northern Arizona University, Arizona State Parks



National Park Visitation

Phoenix & Central Region



Jan.-August YTD Visitation

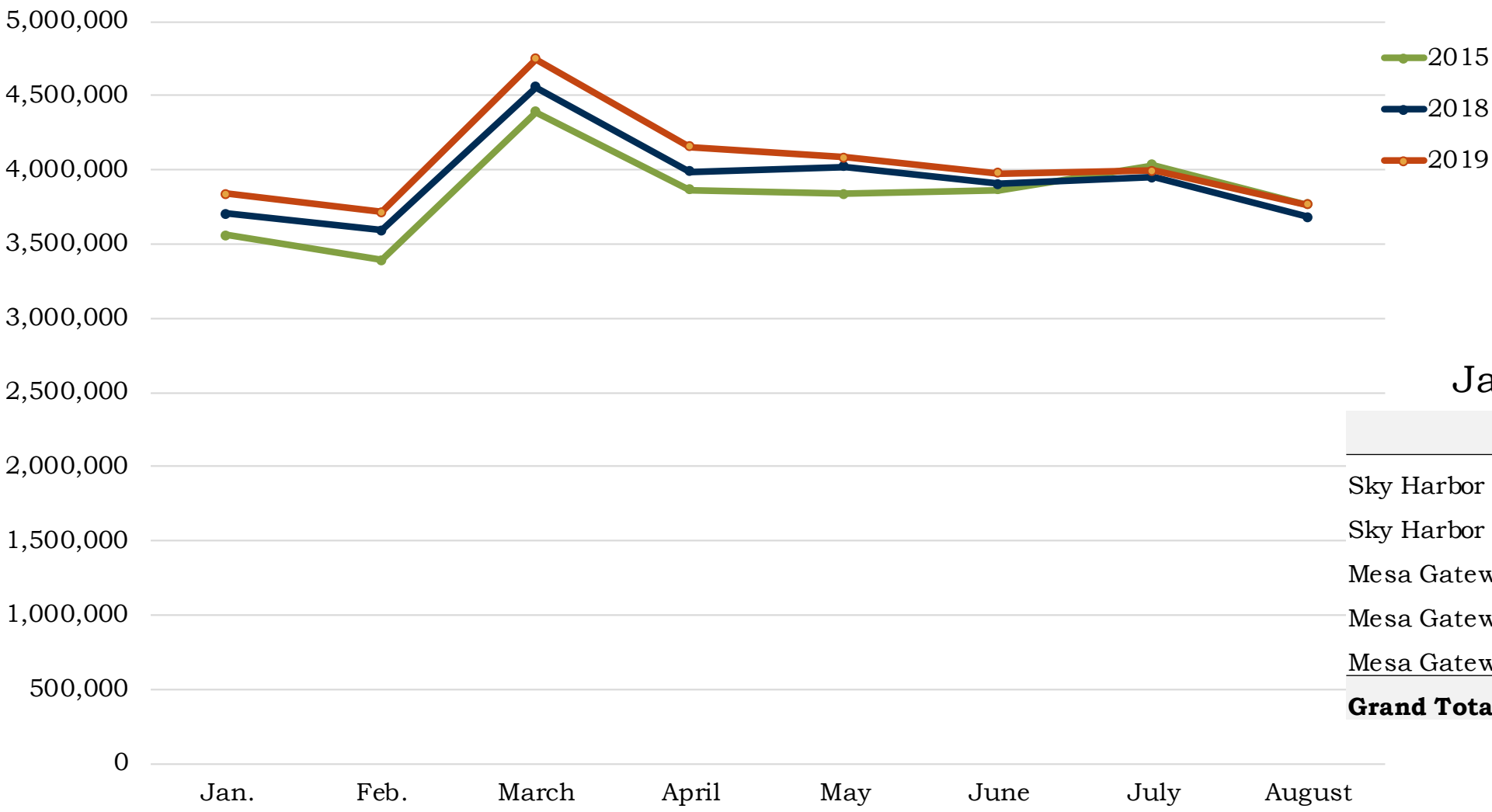
	2019 YTD
Casa Grande NM	47,487

Source: Northern Arizona University, National Park Service



Airport Passenger Volume

Phoenix & Central Region



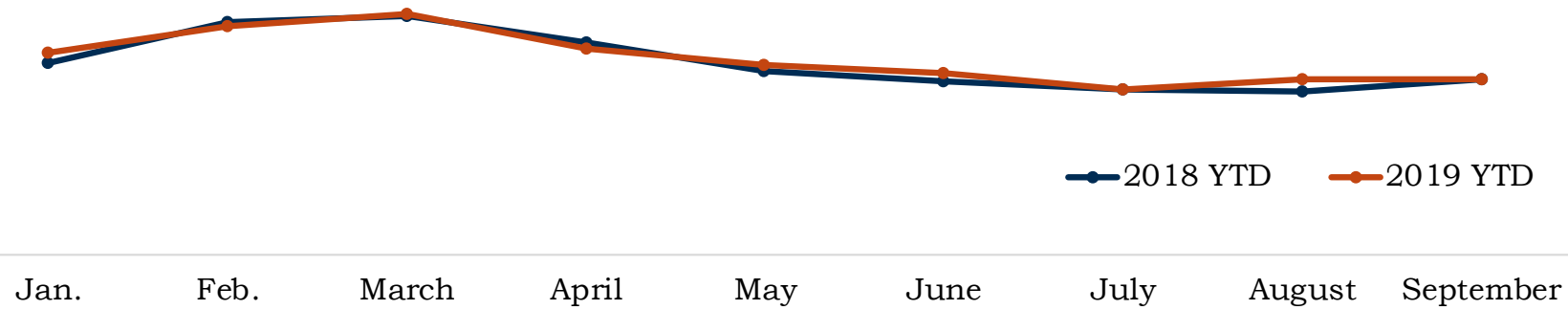
Jan.-August YTD Volume

	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



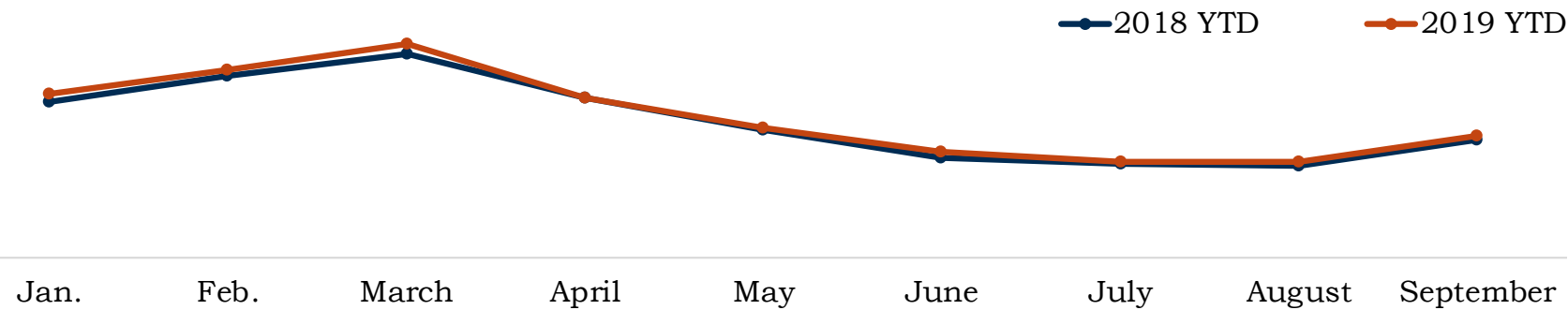
Lodging Indicators

Maricopa County



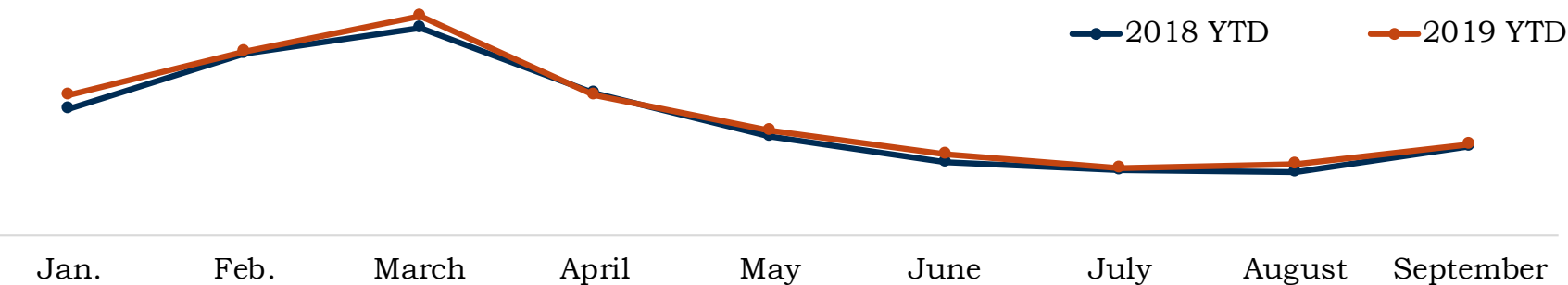
Occupancy

YTD Change = 1.7%



ADR

YTD Change = 2.9%



RevPAR

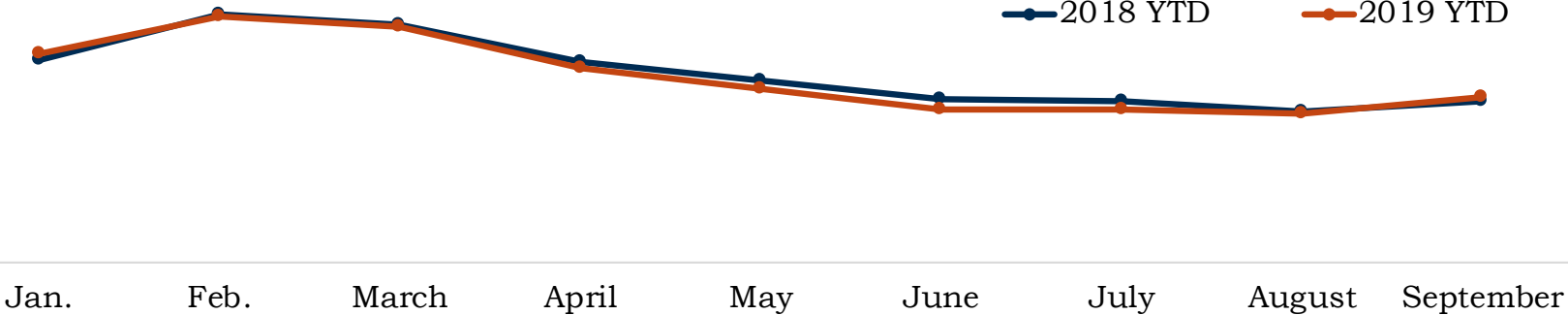
YTD Change = 4.7%



Lodging Indicators

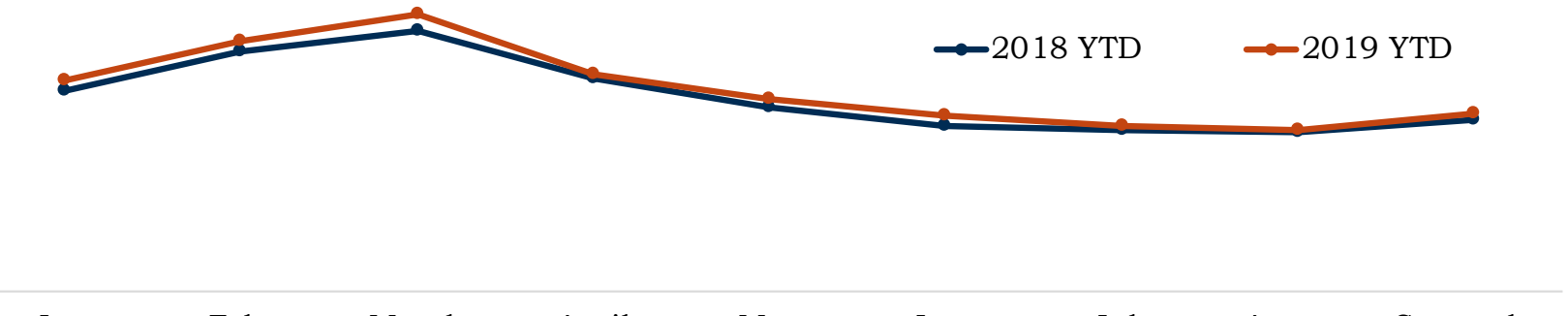
Pinal County

2018 YTD 2019 YTD



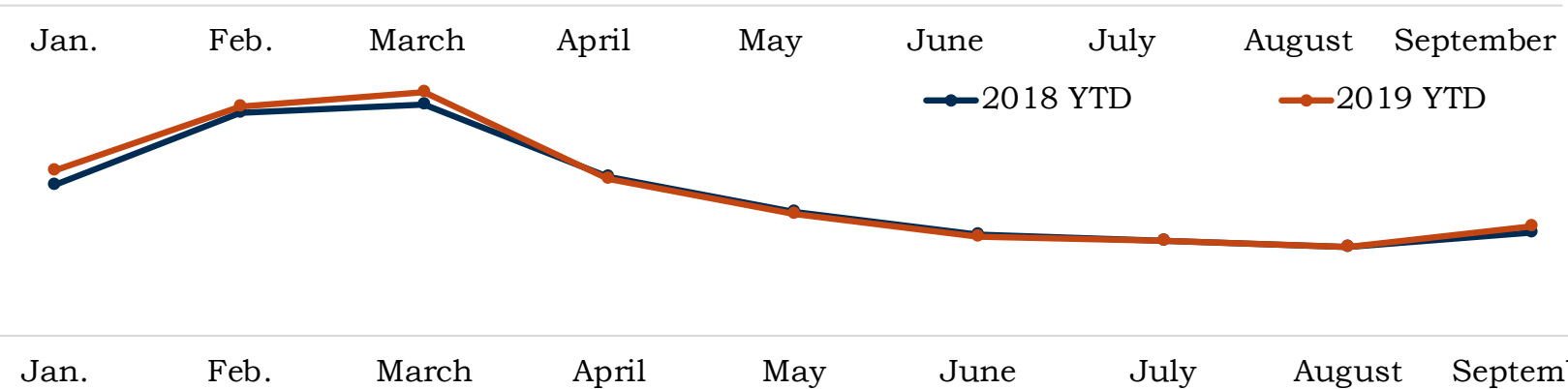
Occupancy
YTD Change = -1.6%

2018 YTD 2019 YTD



ADR
YTD Change = 4.3%

2018 YTD 2019 YTD



RevPAR
YTD Change = 2.6%



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](#)

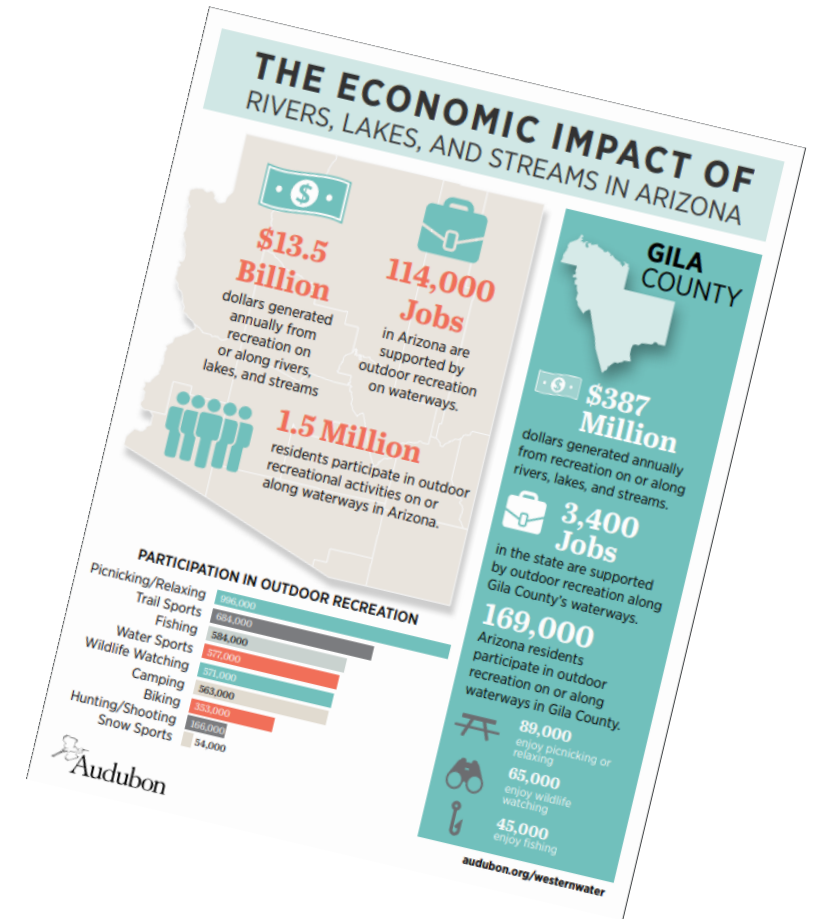
[Graham County: 2006-2018](#)

[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](#)

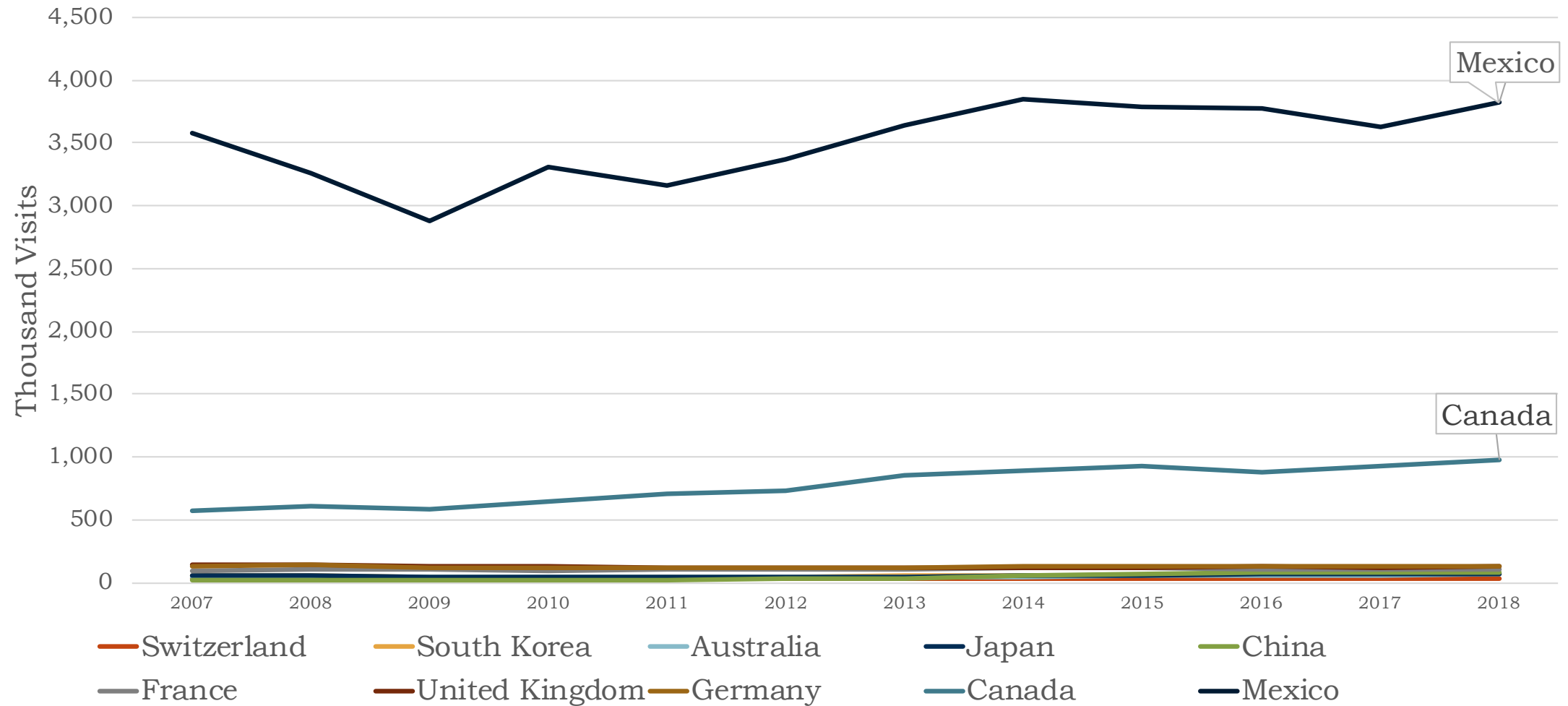




International Visitation

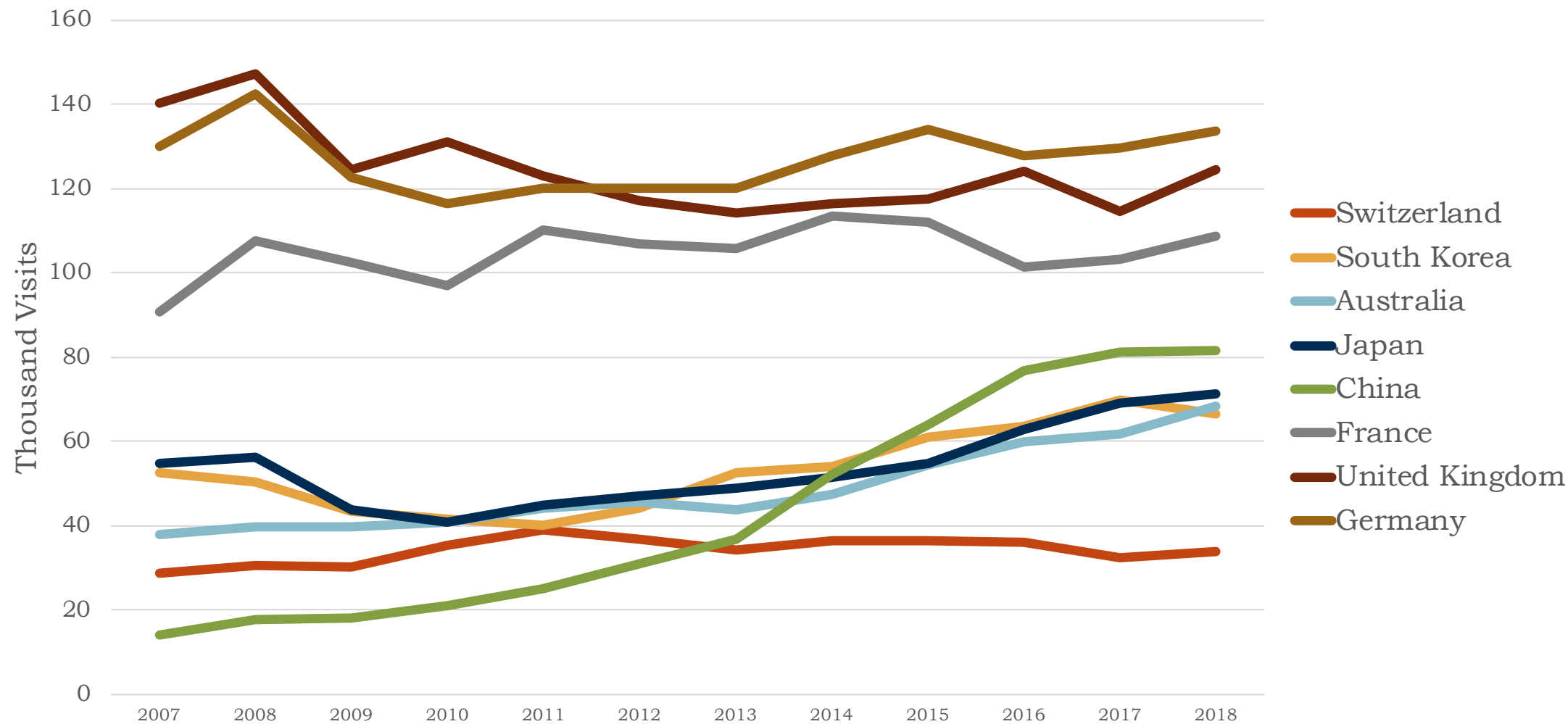


Visitation to Arizona





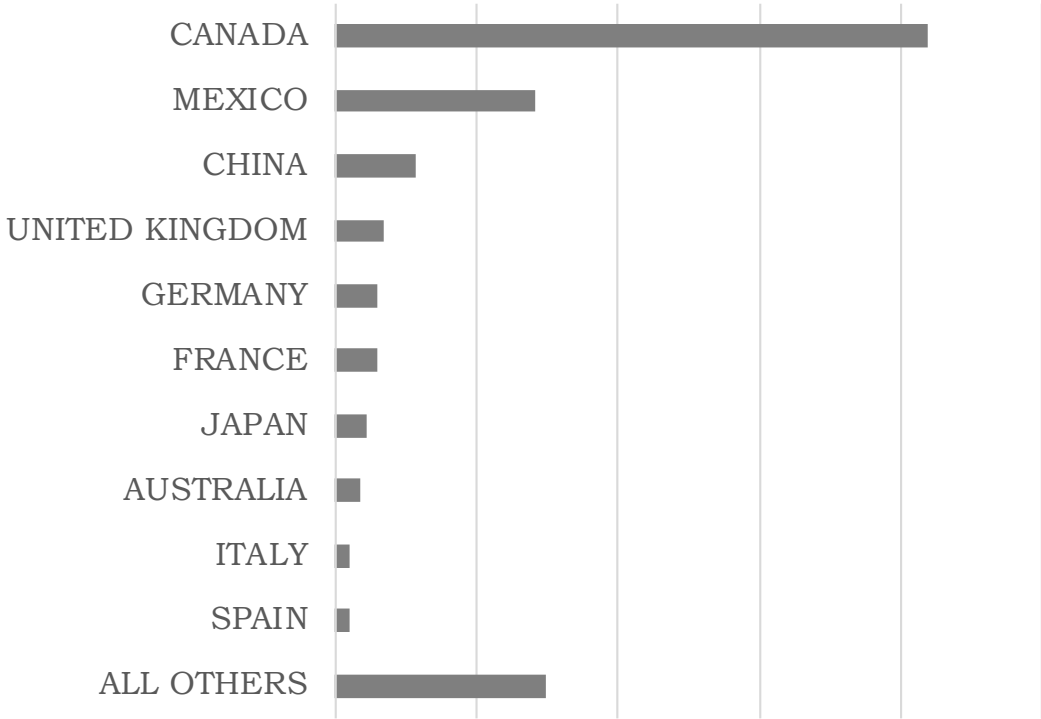
Visitation to Arizona Trend



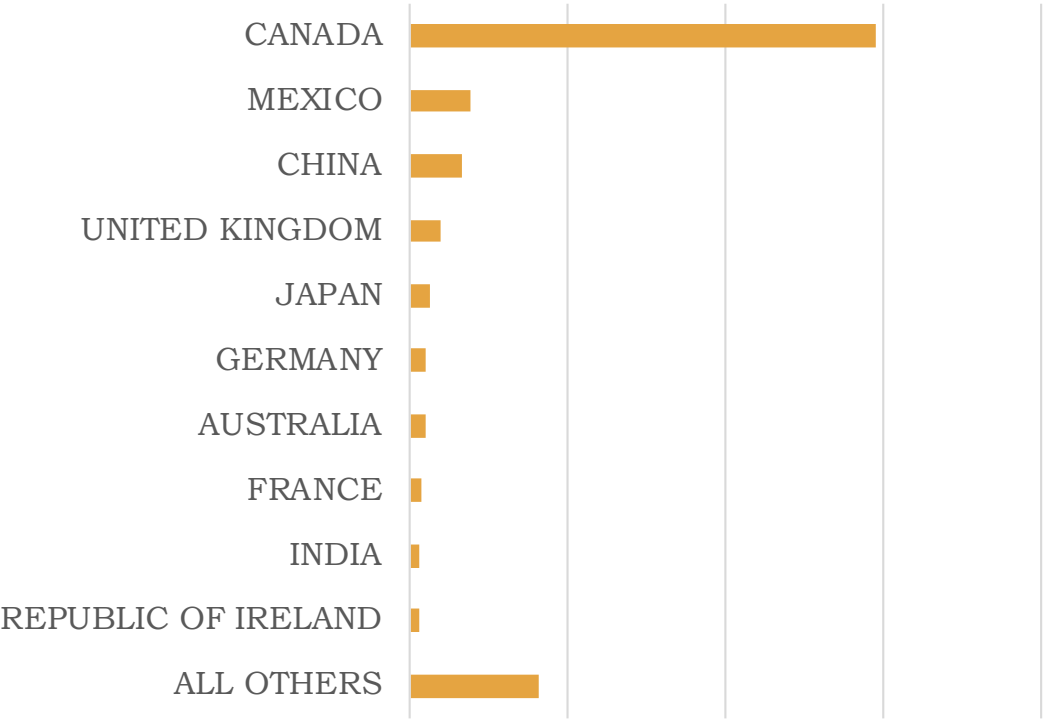


Visa Card Spending Volume

Arizona

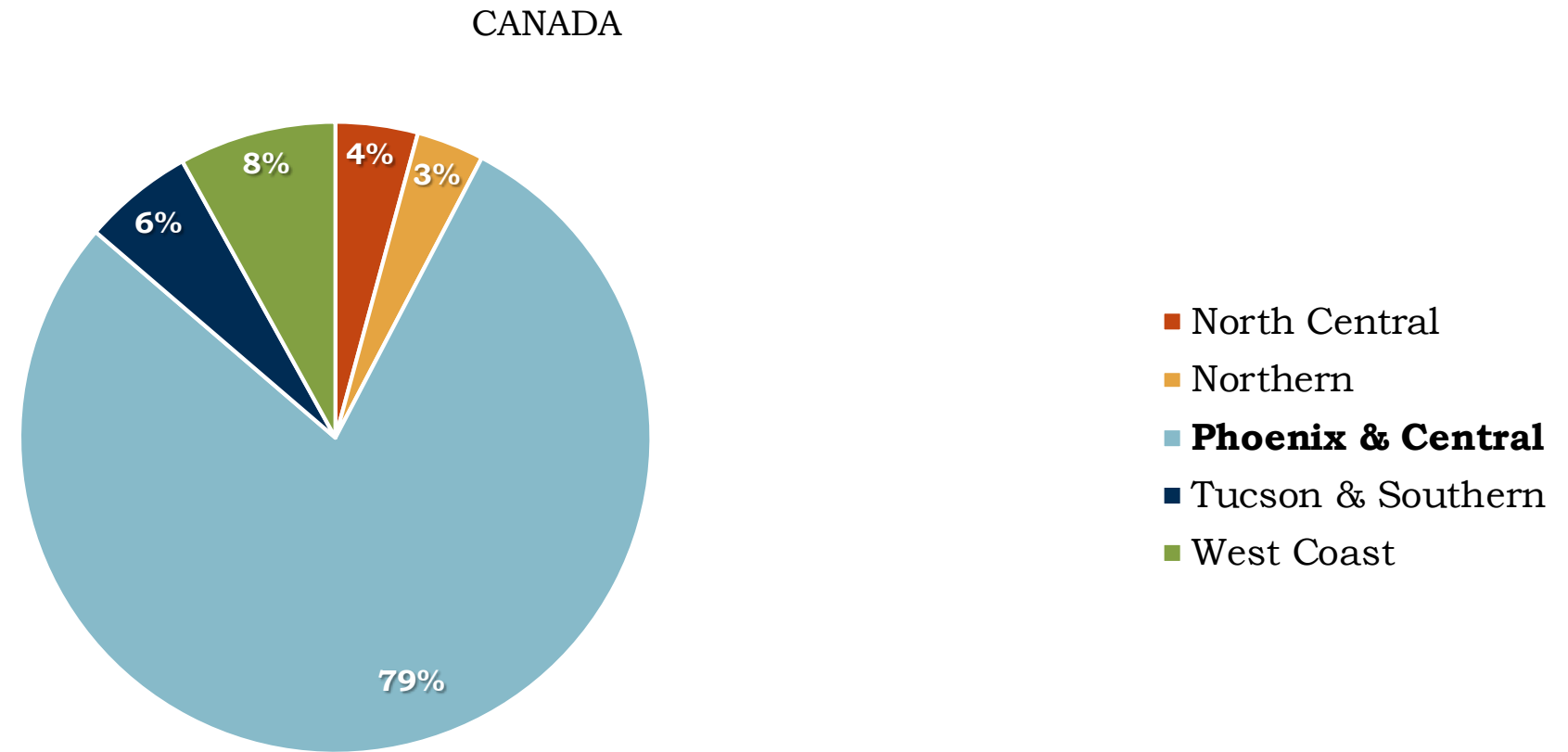


Phoenix & Central Region

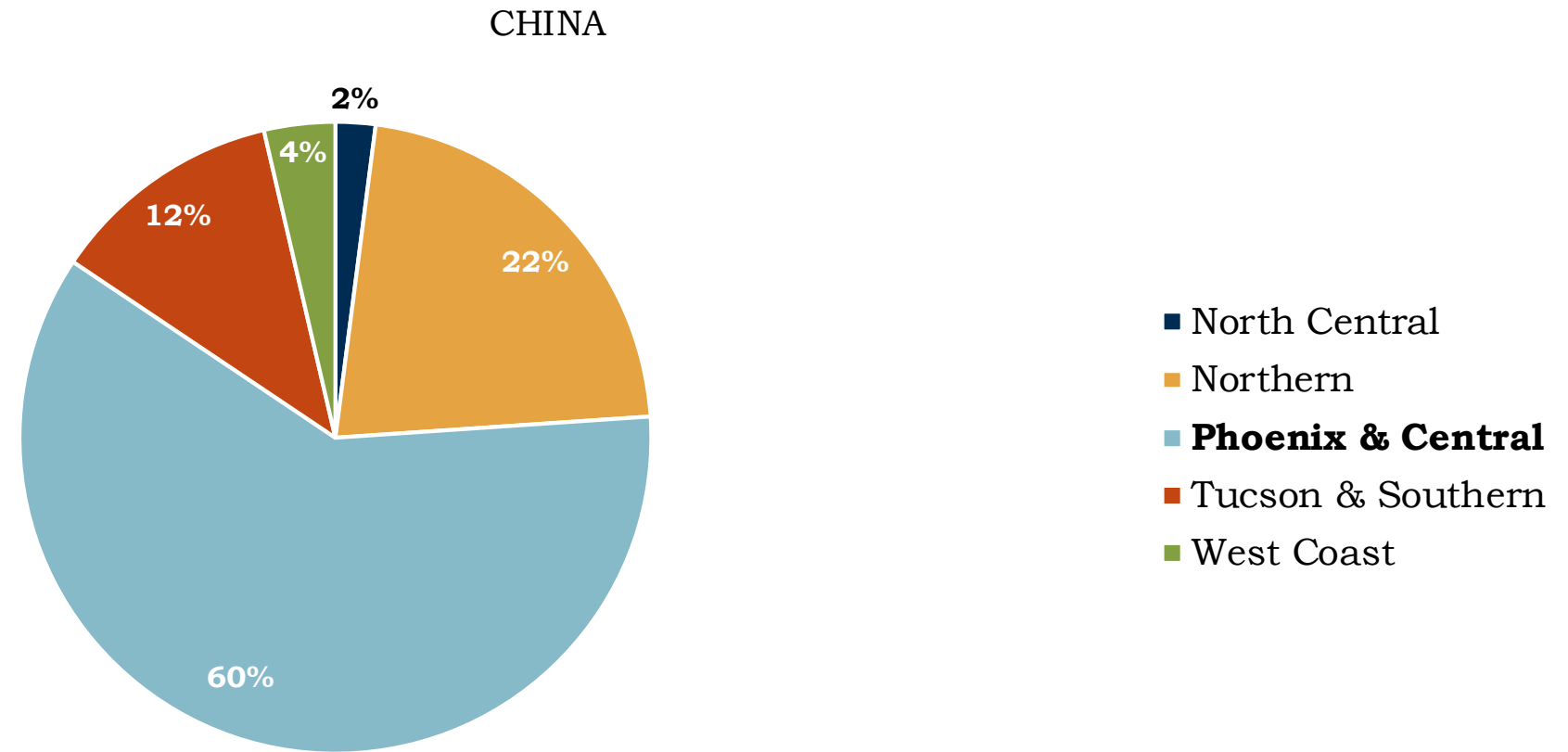


Source: VisaVue Travel, 2018

Where do visitors spend the most?

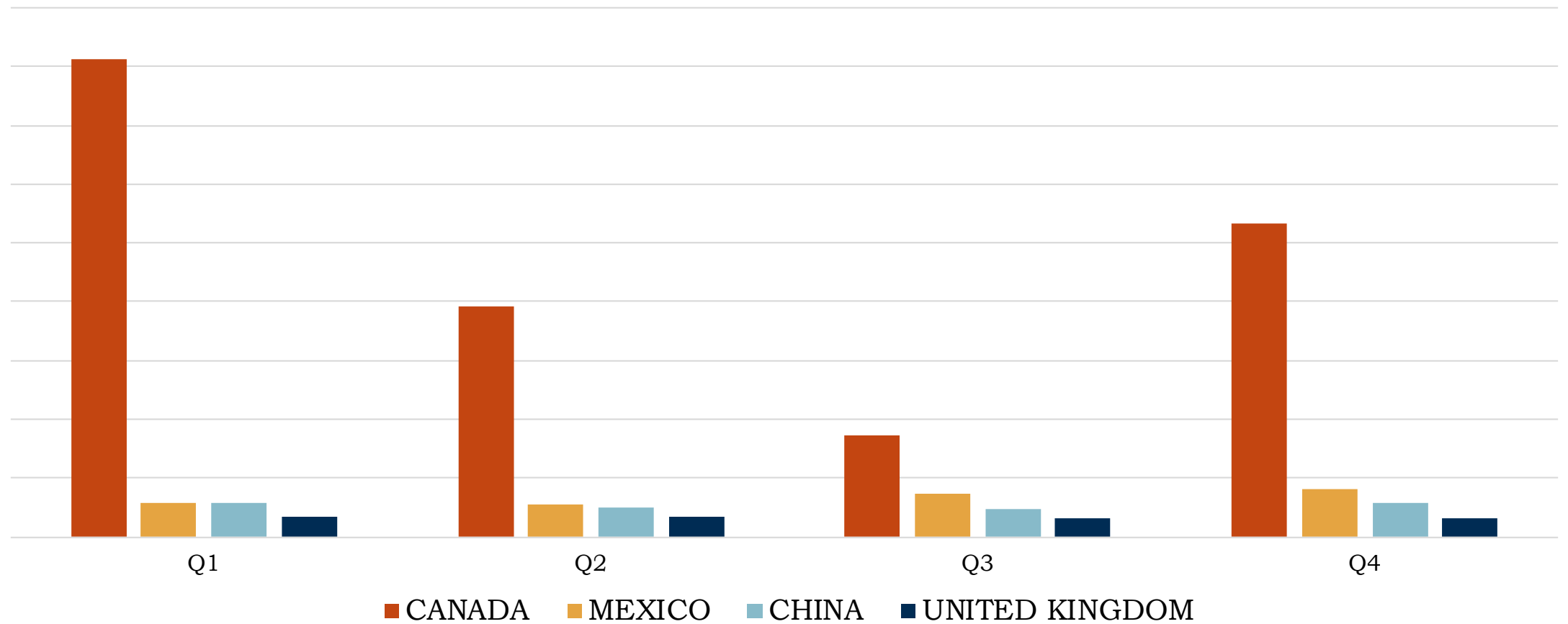


Where do visitors spend the most?





Seasonal Spending



Source: Sales and Cash Withdrawals, VisaVue Travel, 2018



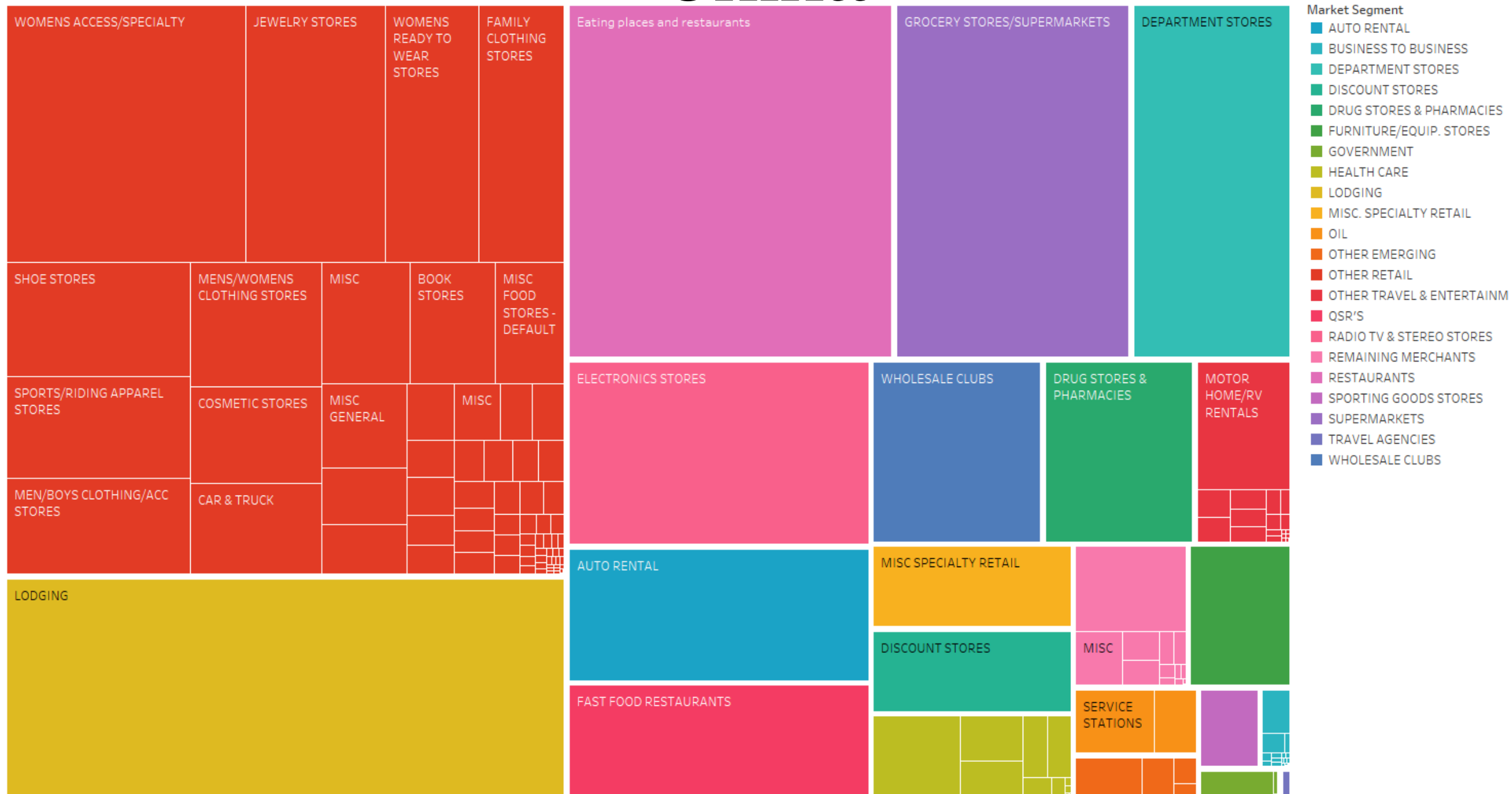


Mexico



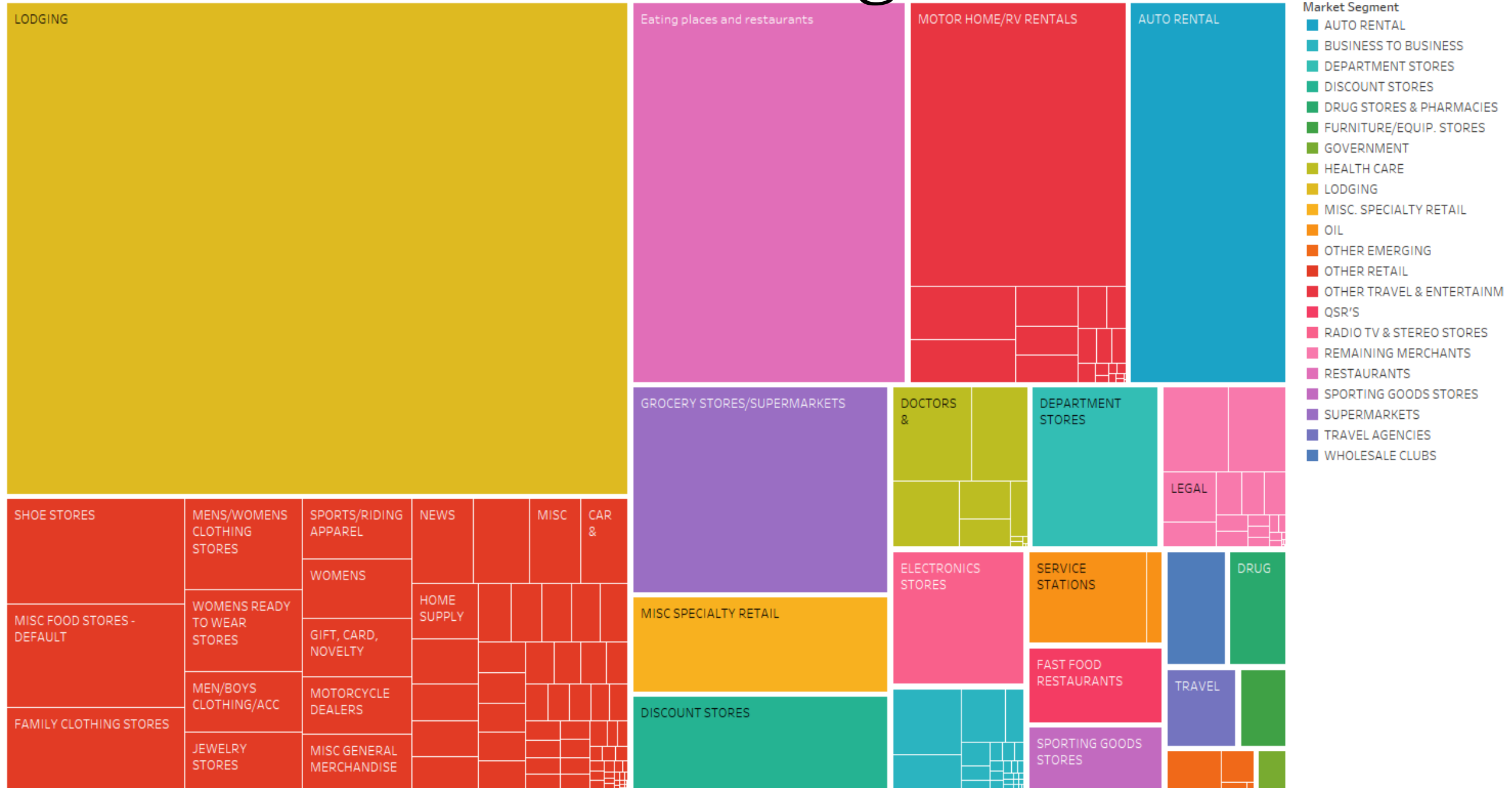


China

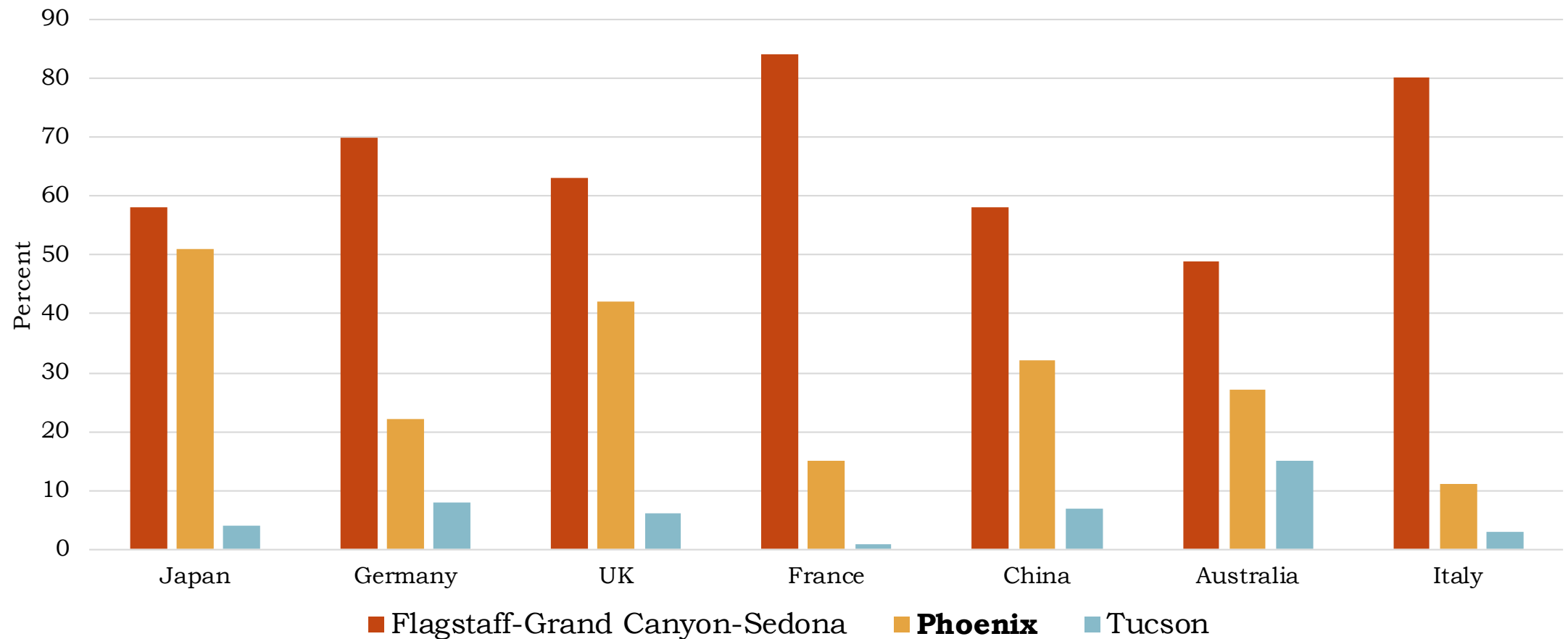




United Kingdom



Overseas Visitation – AZ Destinations



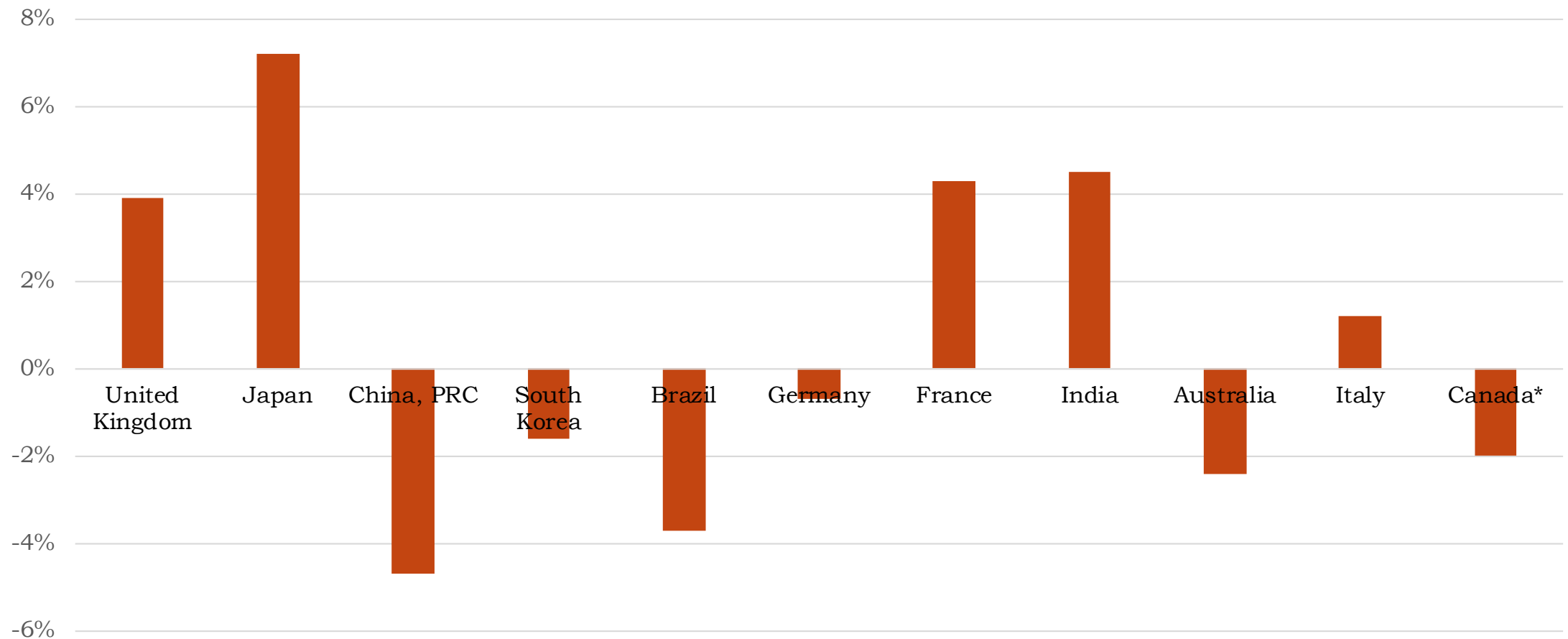
Source: Survey of International Air Travelers 2018, NTTO

2019 International Visitor Trends



Arrivals to the U.S.

% Change YTD September 2019*

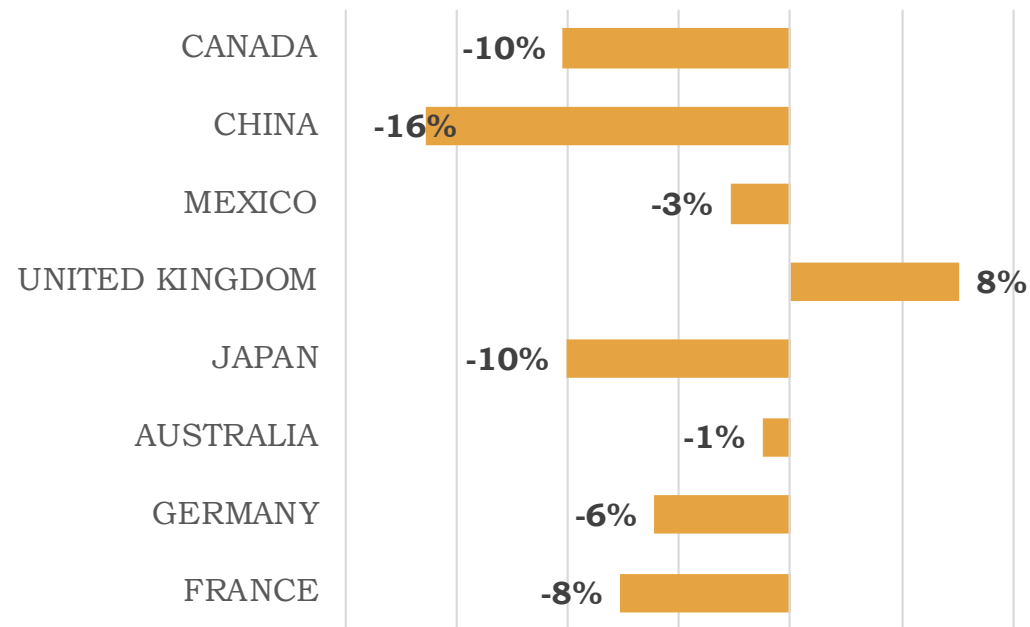


Source: National Travel and Tourism Office, Statistics Canada *Canada arrivals are YTD August 2019

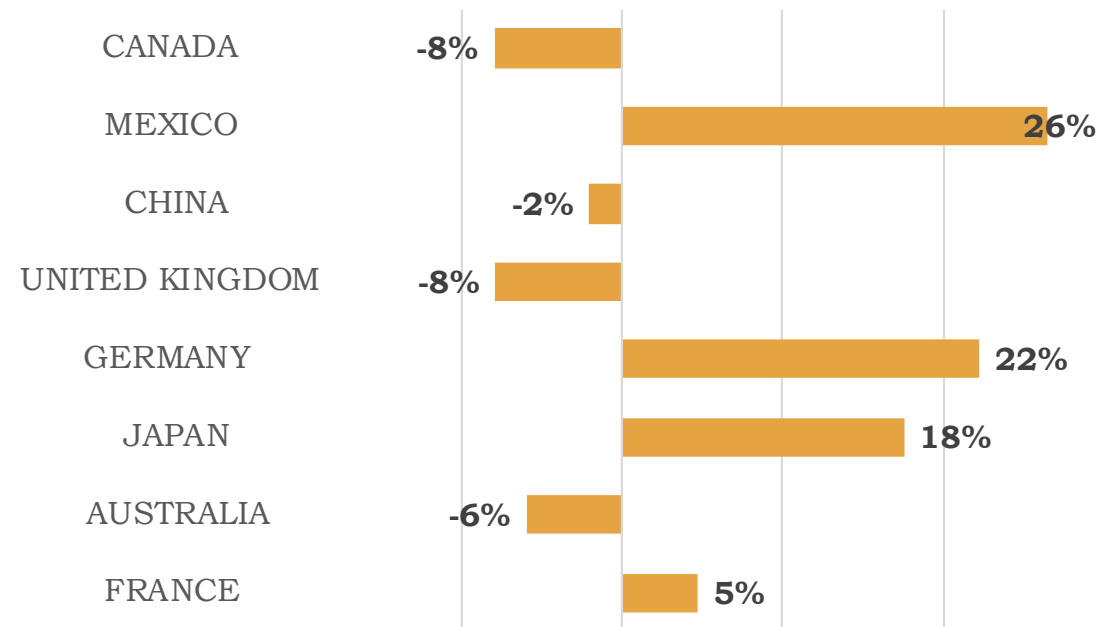
International Visa Card Spending

Phoenix & Central Region

Q1 2019 (January-March)



Q2 2019 (April-June)



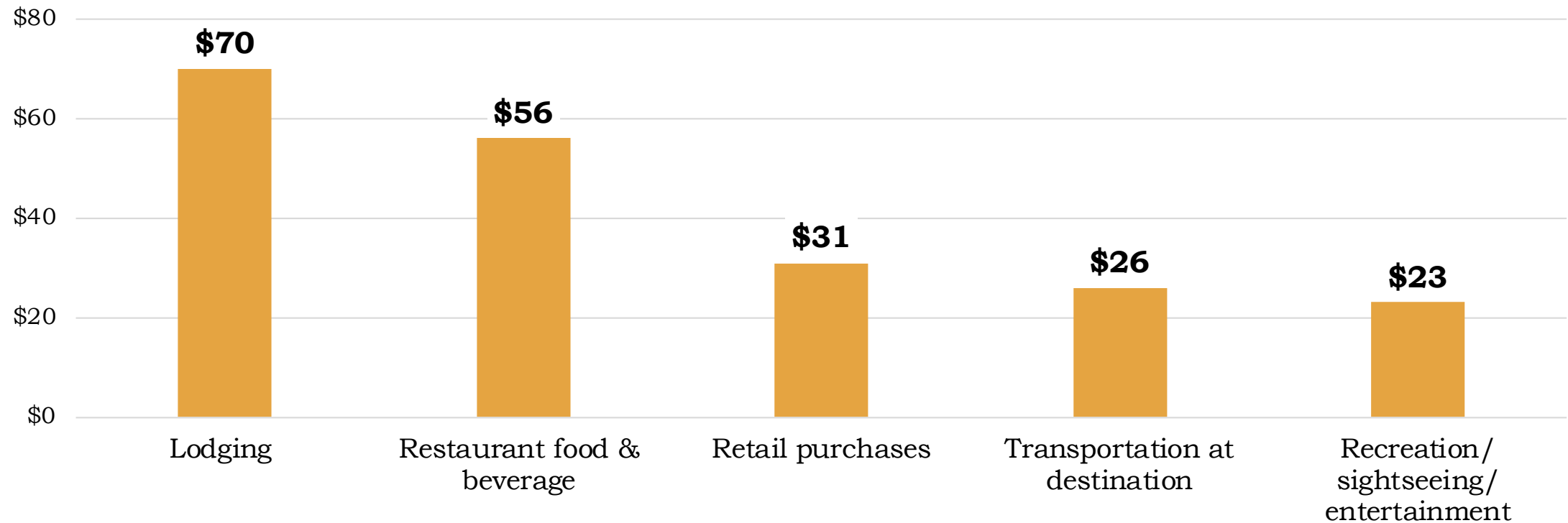
Domestic Overnight Visitor Expenditures 2018

Phoenix & Central Region



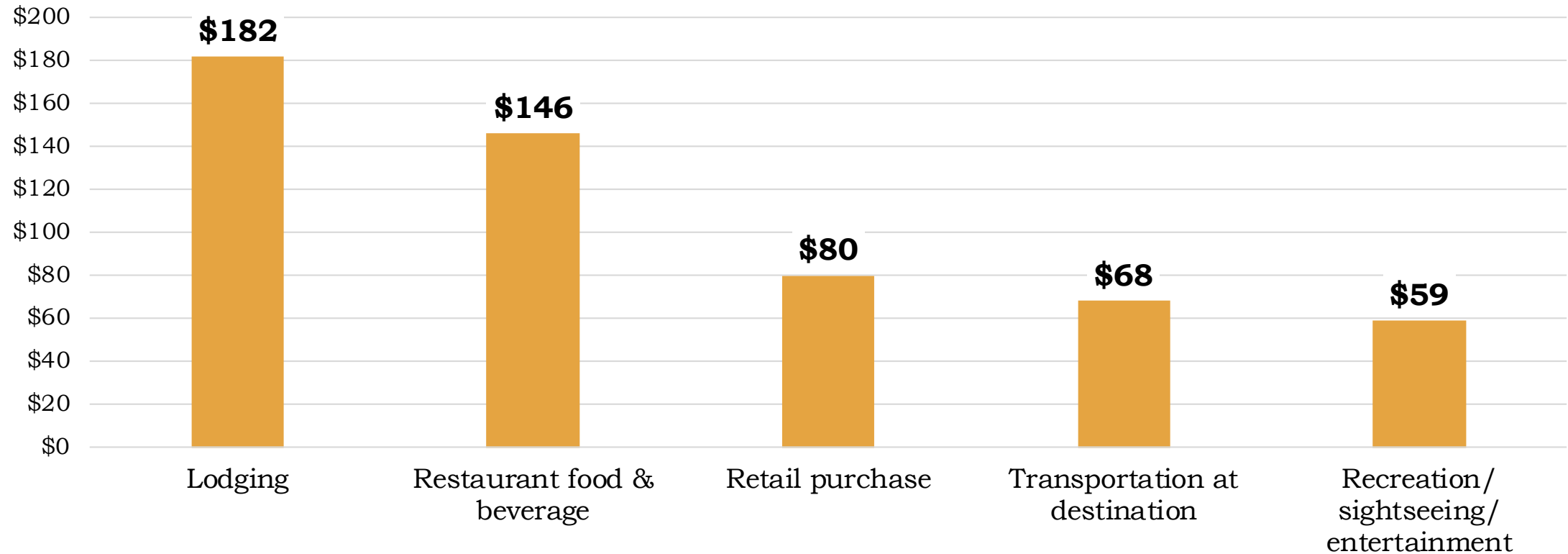
Average Per-Person Expenditures on Domestic Overnight Trips

Average Per Person \$206



Average Per-Party Expenditures on Domestic Overnight Trips

Average Per Party \$535





Domestic Overnight Visitor Profile 2018

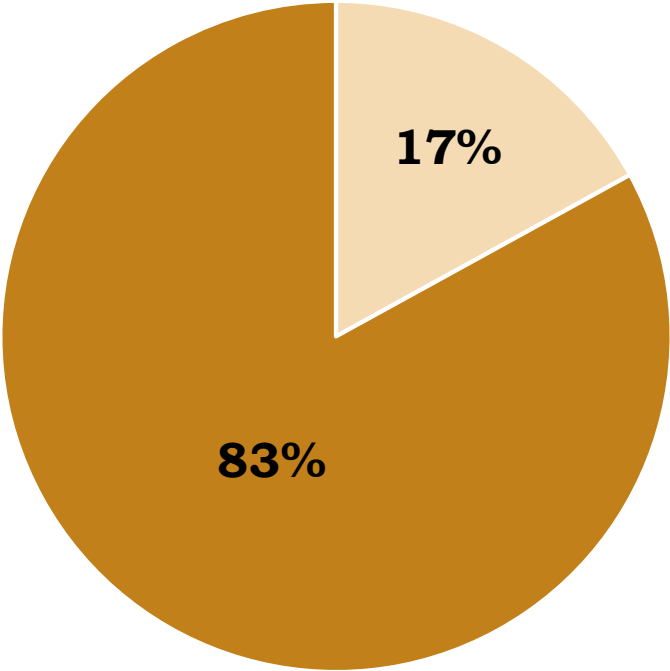
Phoenix & Central Region



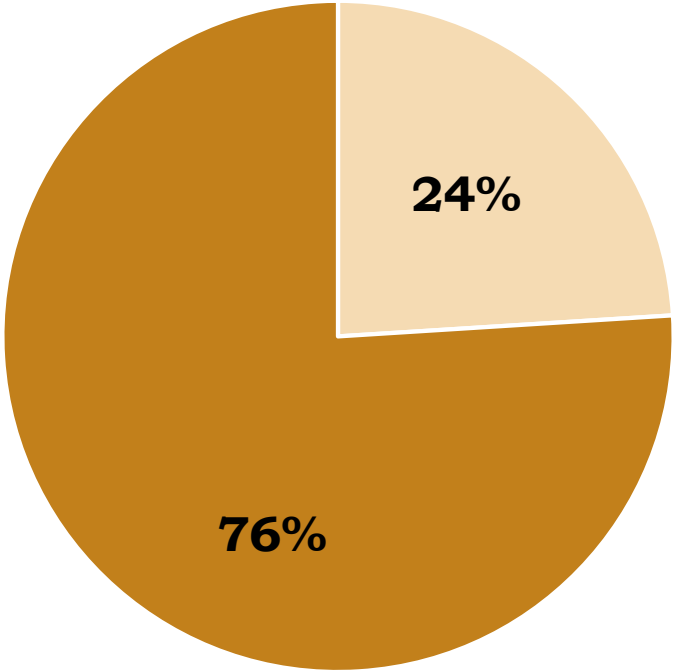


2018 Regional Domestic Visitor Profile

Phoenix & Central Region



■ Business ■ Leisure

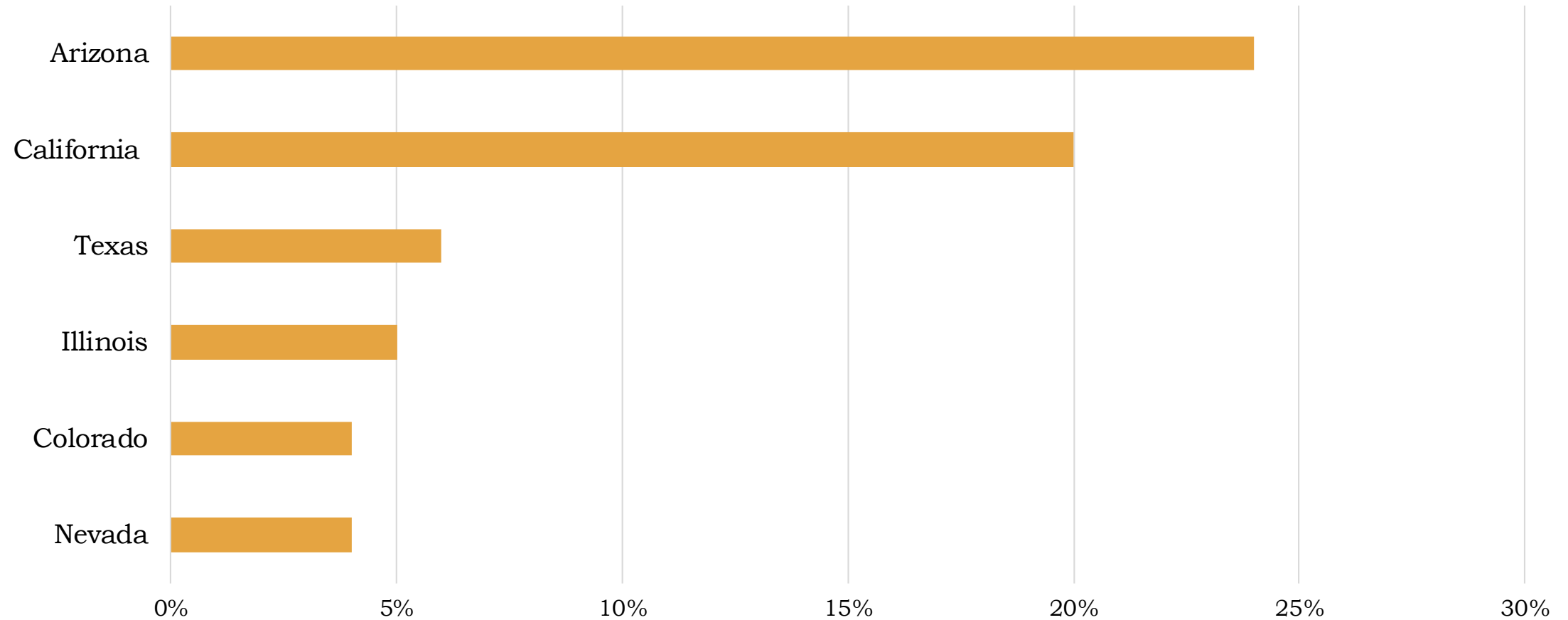


■ AZ Residents ■ Non-Residents



State Origin of Overnight Trips

Phoenix & Central Region

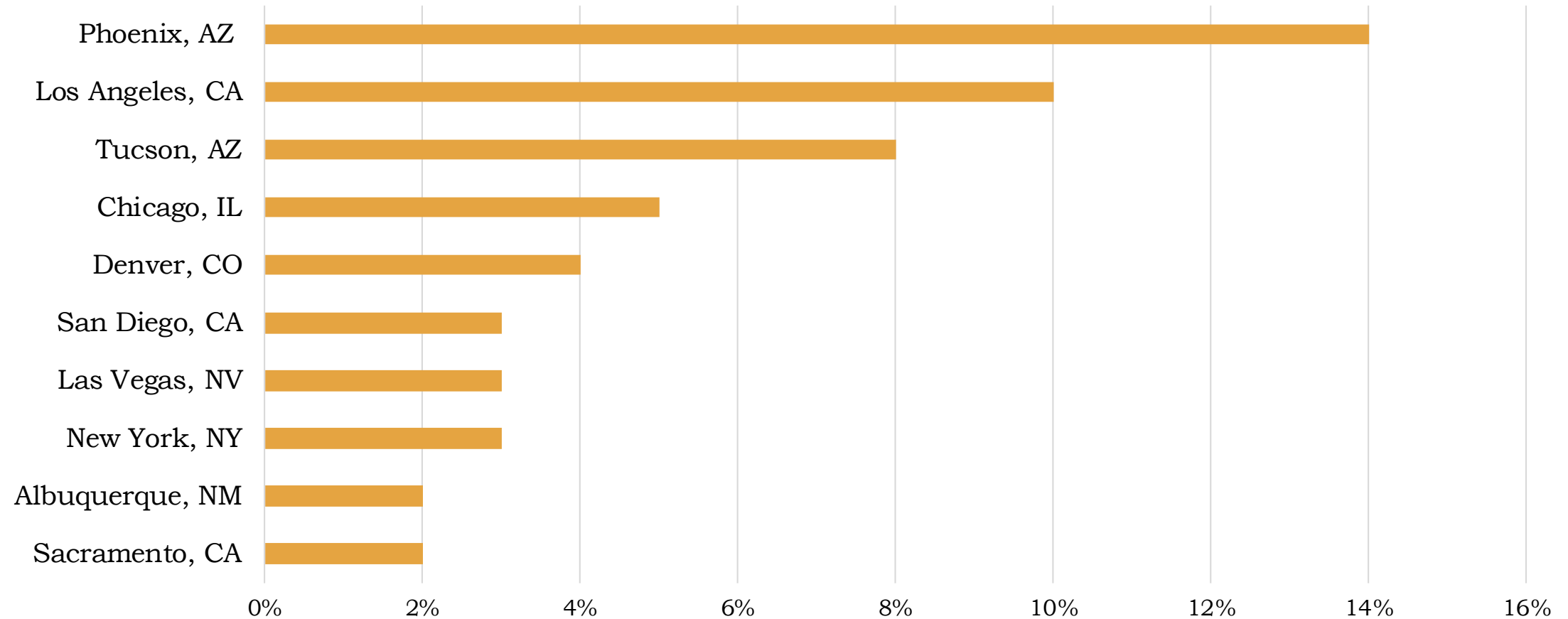


Source: Longwoods International



DMA Origin of Overnight Trip

Phoenix & Central Region

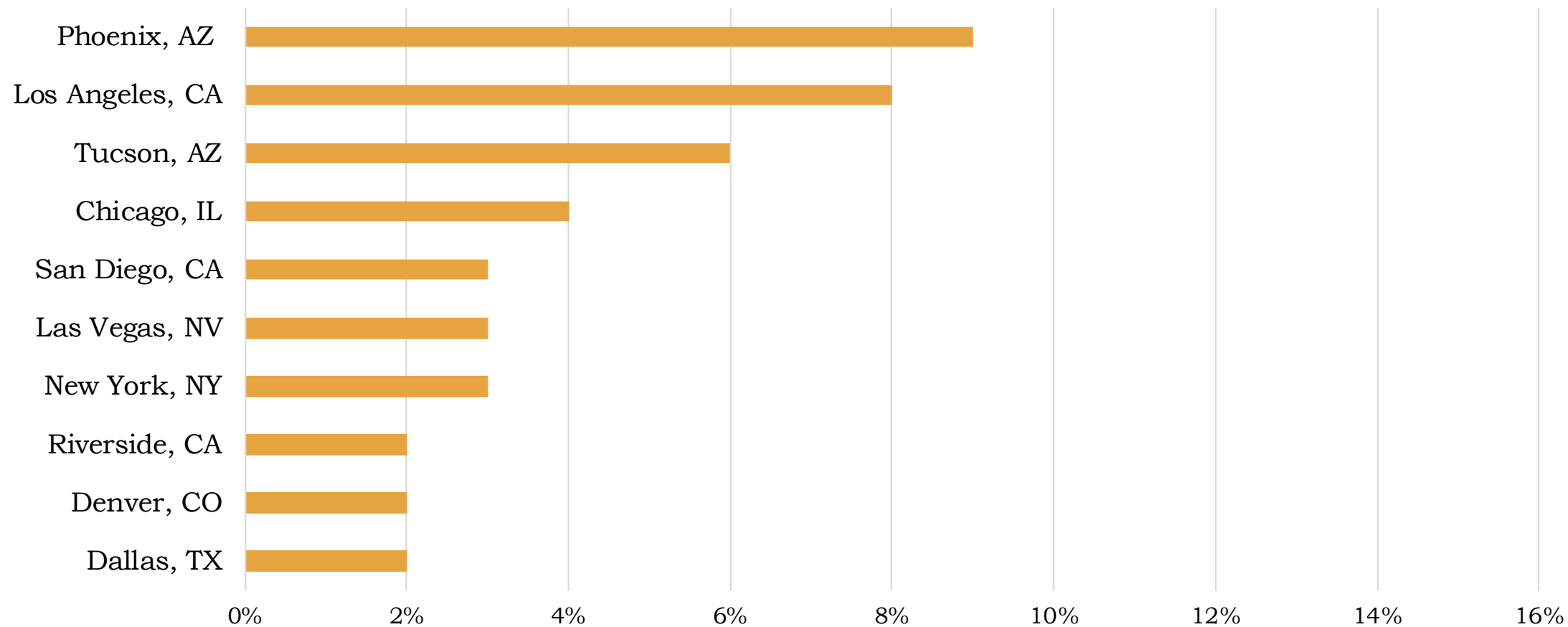


Source: Longwoods International



MSA Origin of Overnight Trip

Phoenix & Central Region

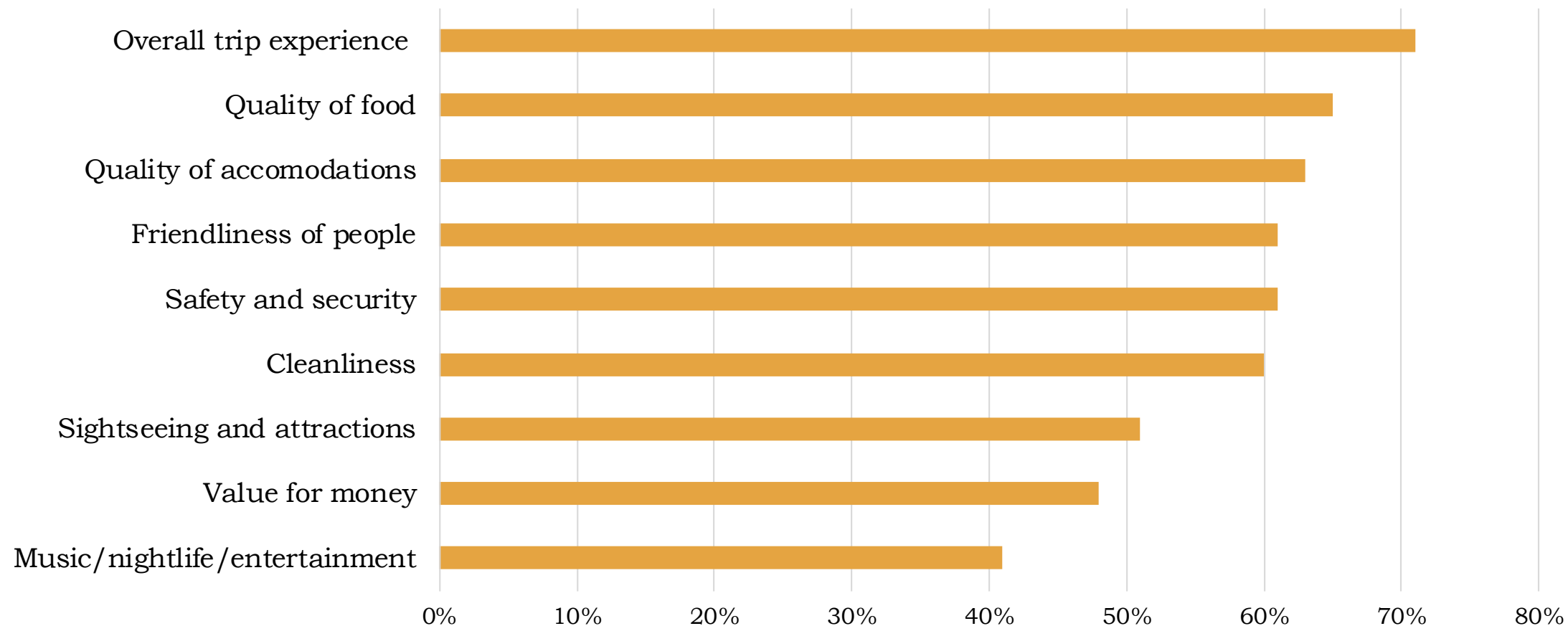


Source: Longwoods International



Satisfaction with Trip - % Very Satisfied

Phoenix & Central Region

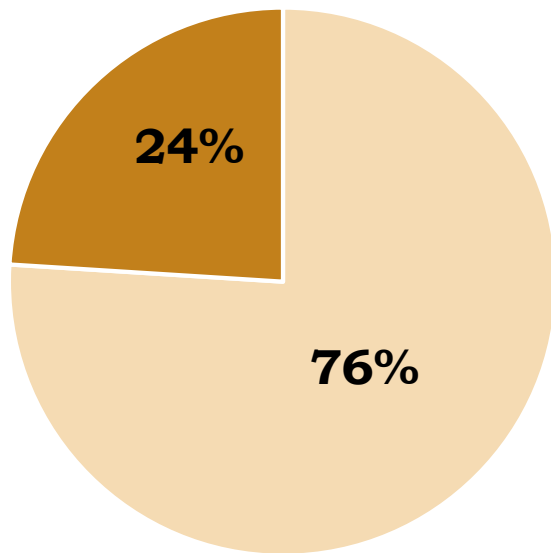




Past Visitation

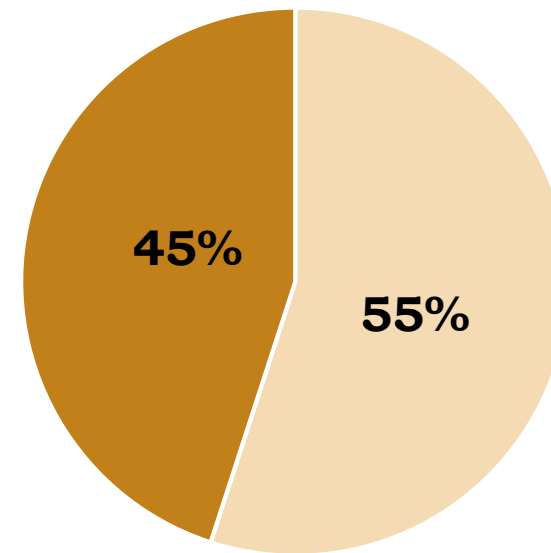
Phoenix & Central Region

Have you ever visited the Phoenix
& Central Region before?



■ Yes ■ No

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

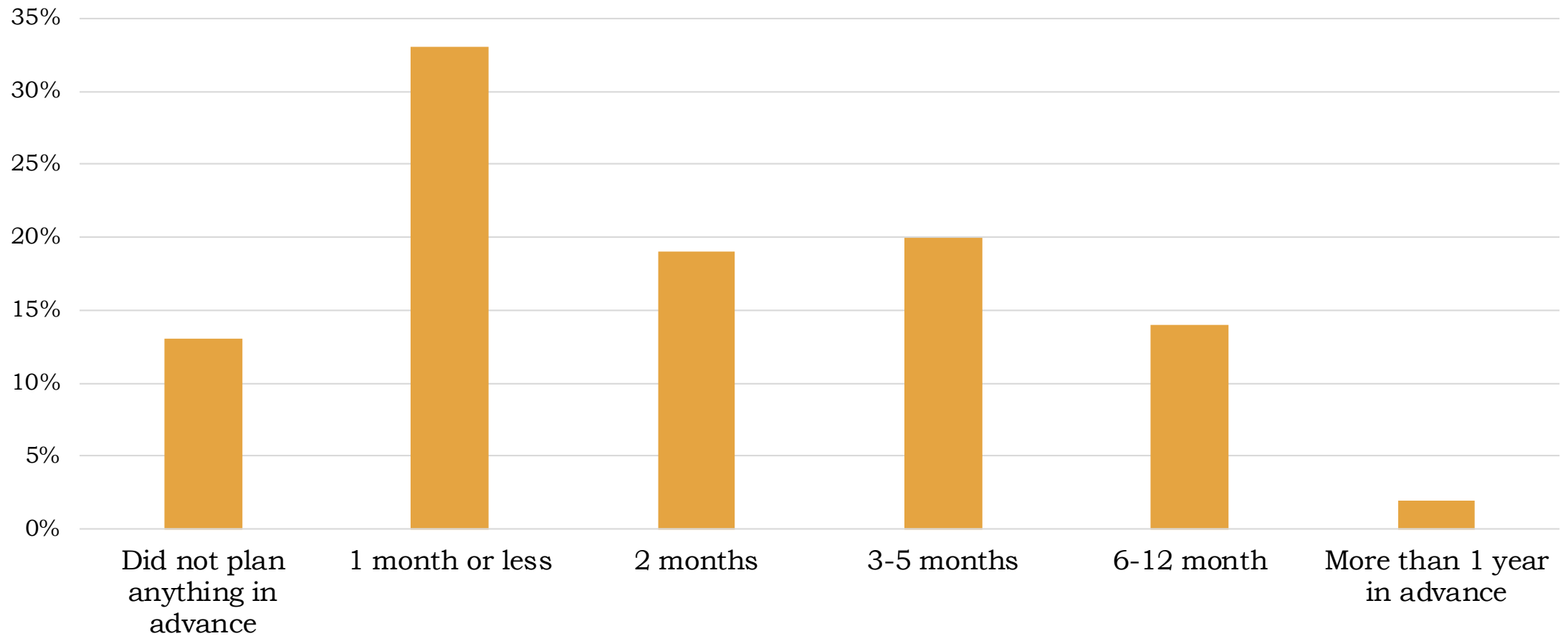


■ Yes ■ No



Length of Trip Planning

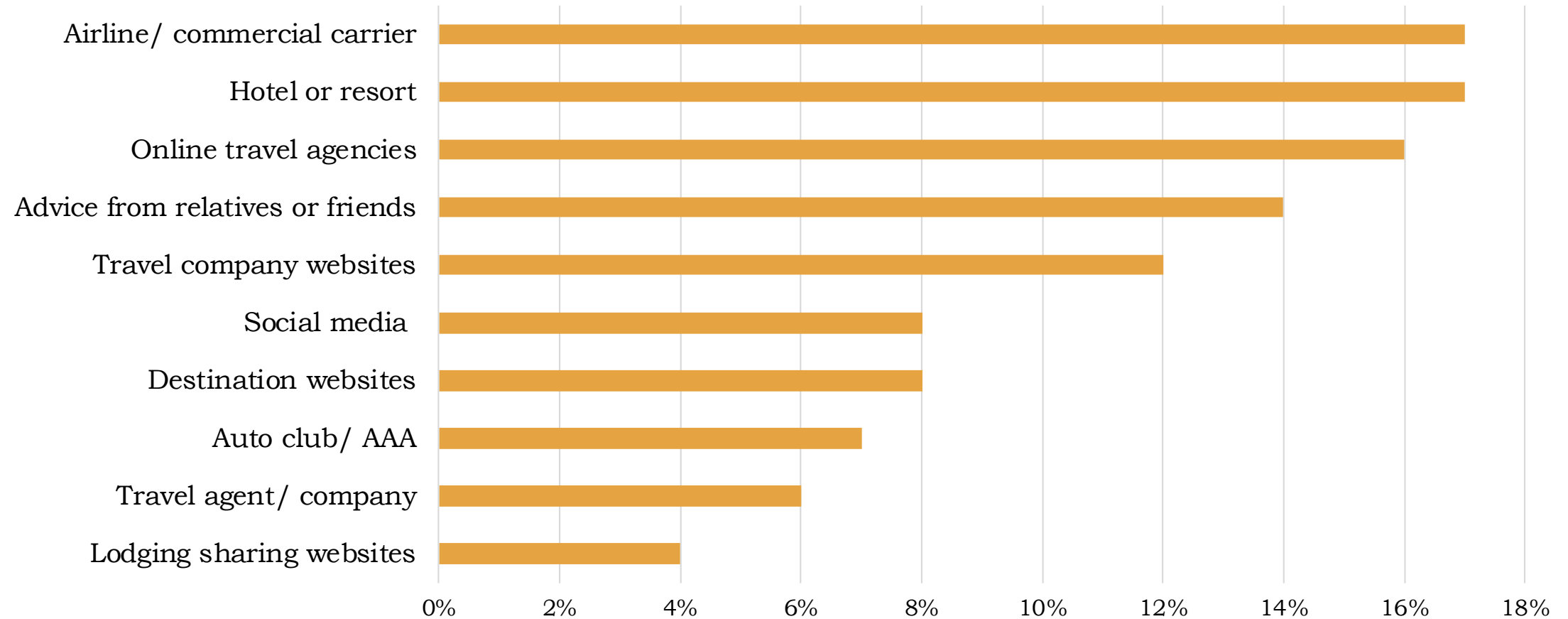
Phoenix & Central Region





Trip Planning Information Sources

Phoenix & Central Region

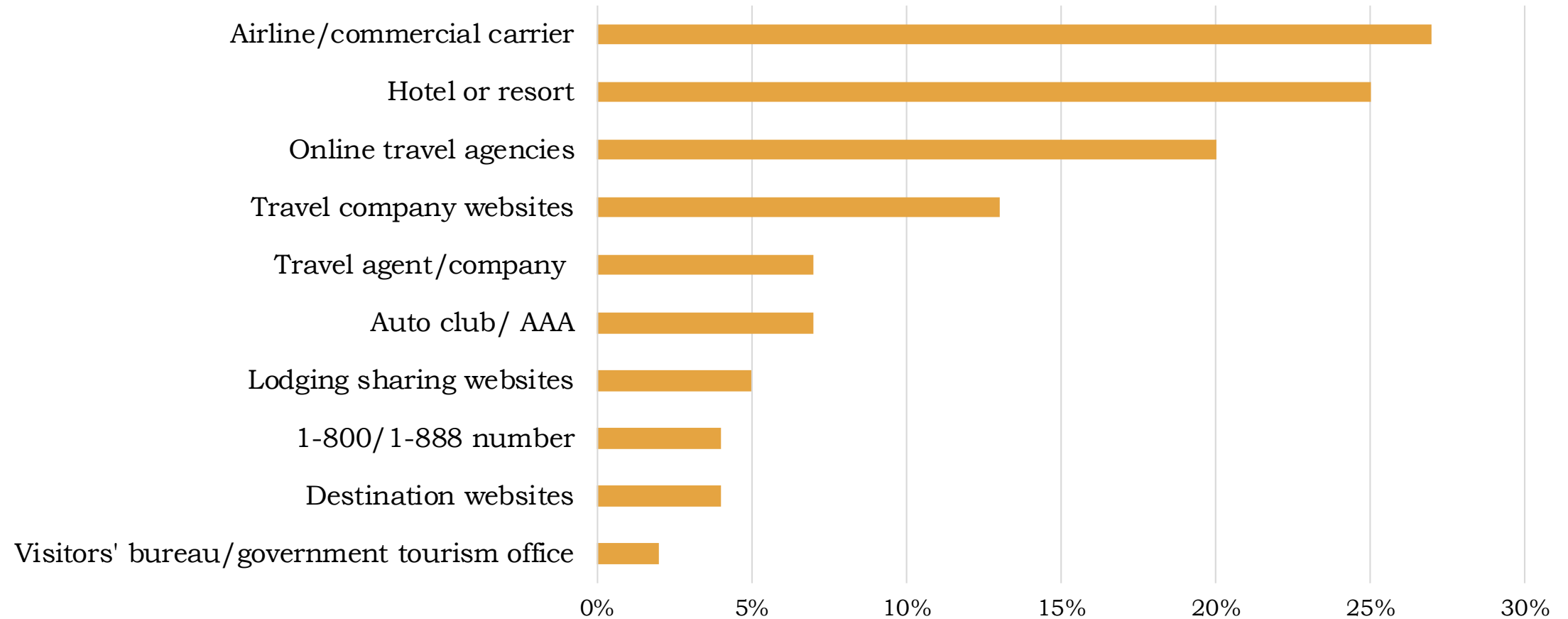


Source: Longwoods International



Method of Booking

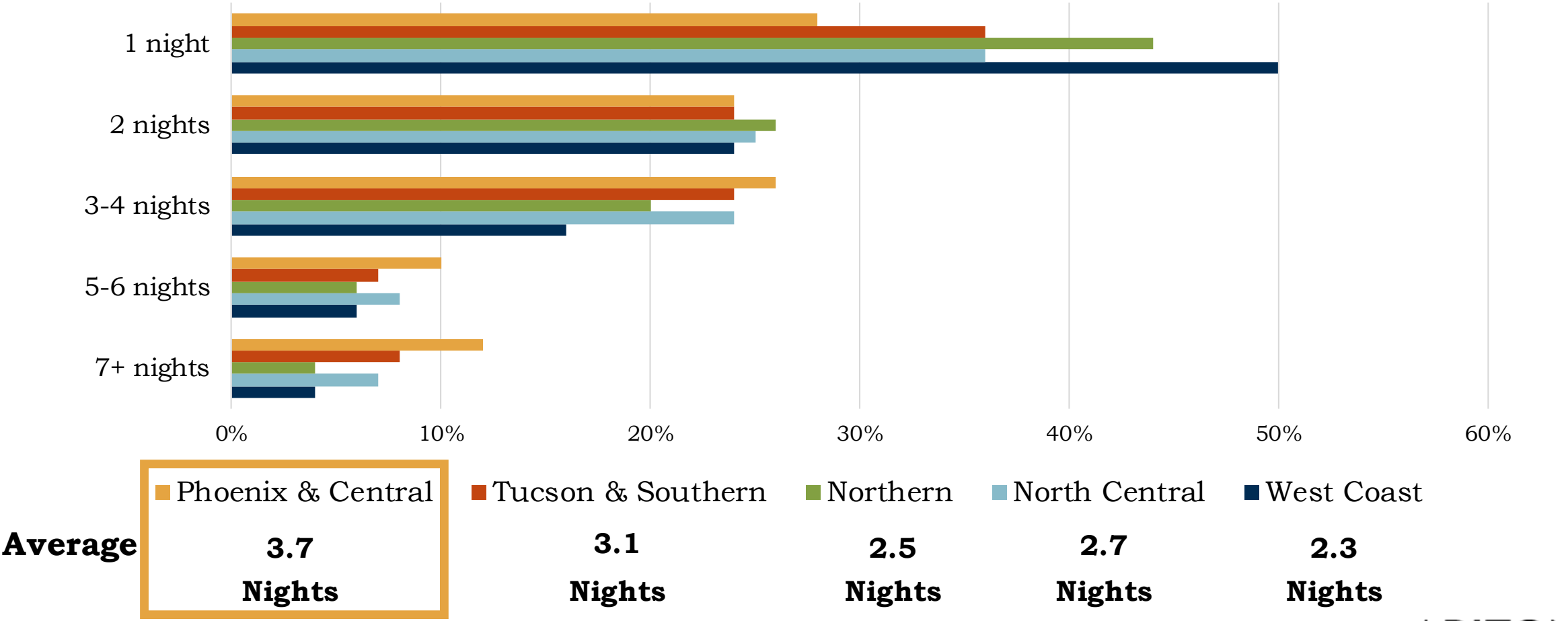
Phoenix & Central Region





Number of Nights Spent in Each Region

Phoenix & Central

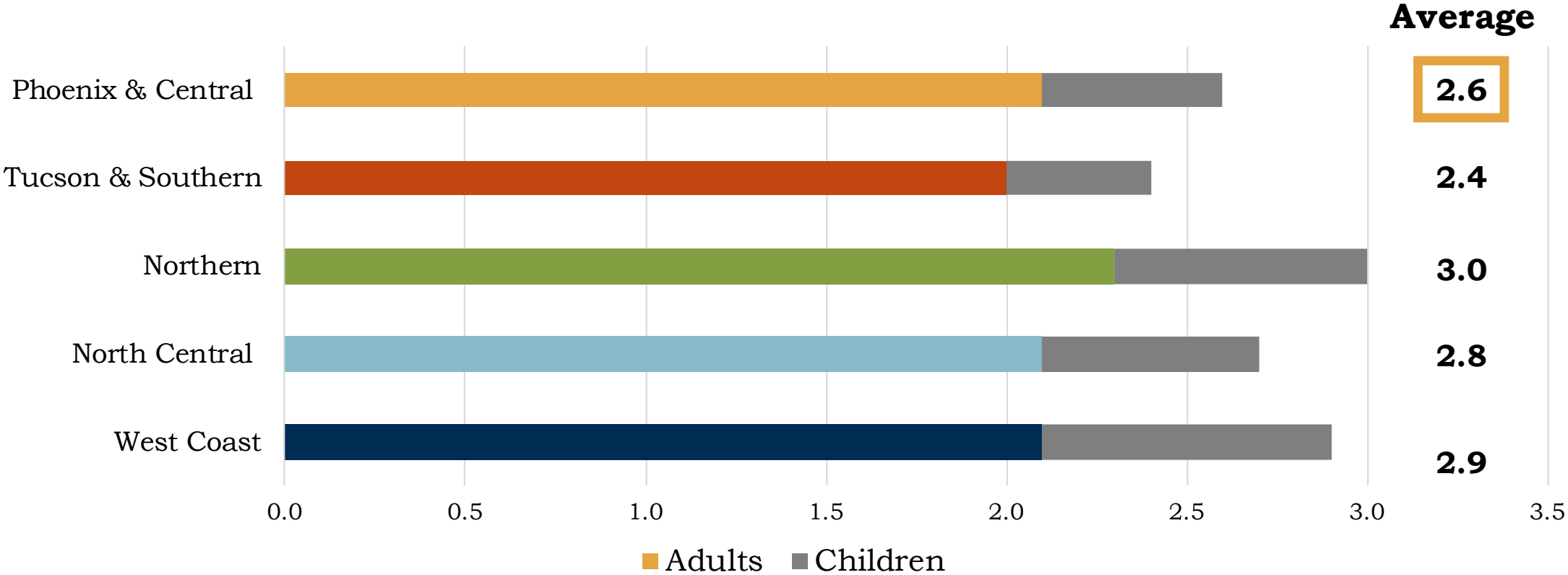


Source: Longwoods International, 2018



Size of Travel Party

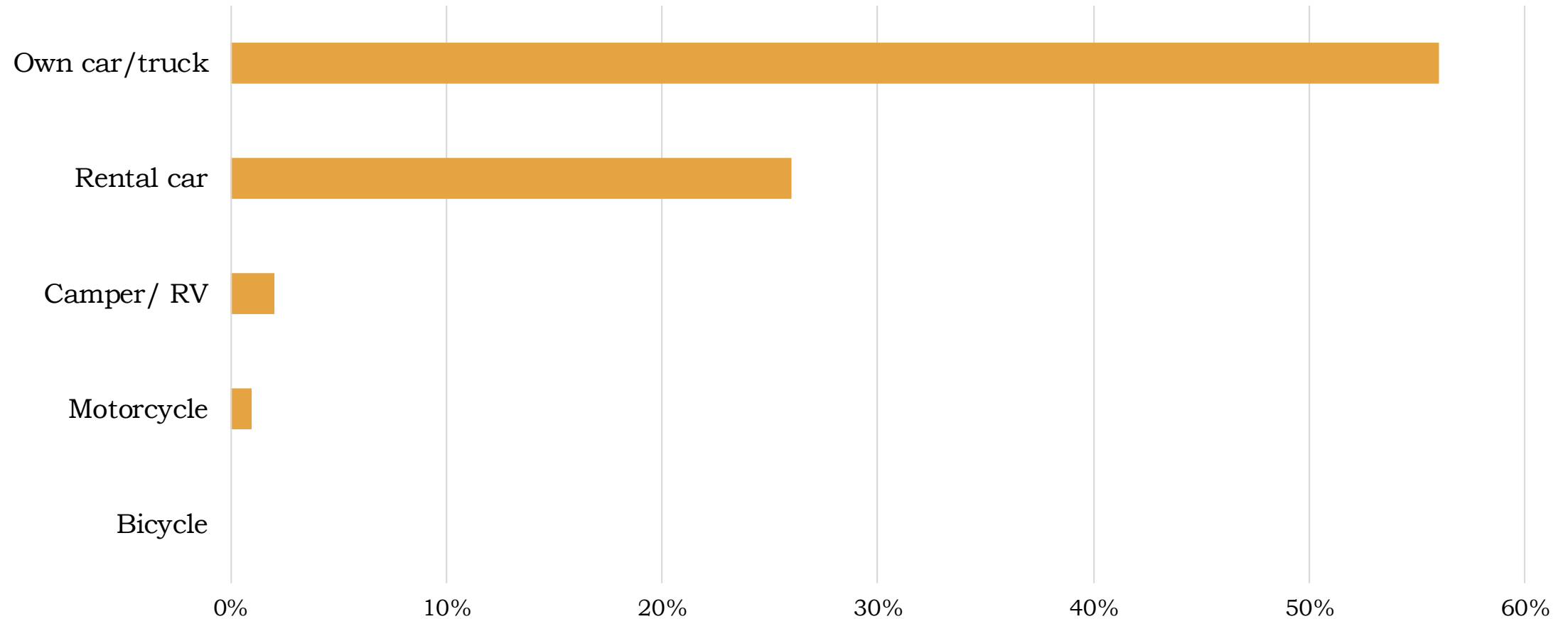
Phoenix & Central Region





Transportation – Private Vehicles

Phoenix & Central Region

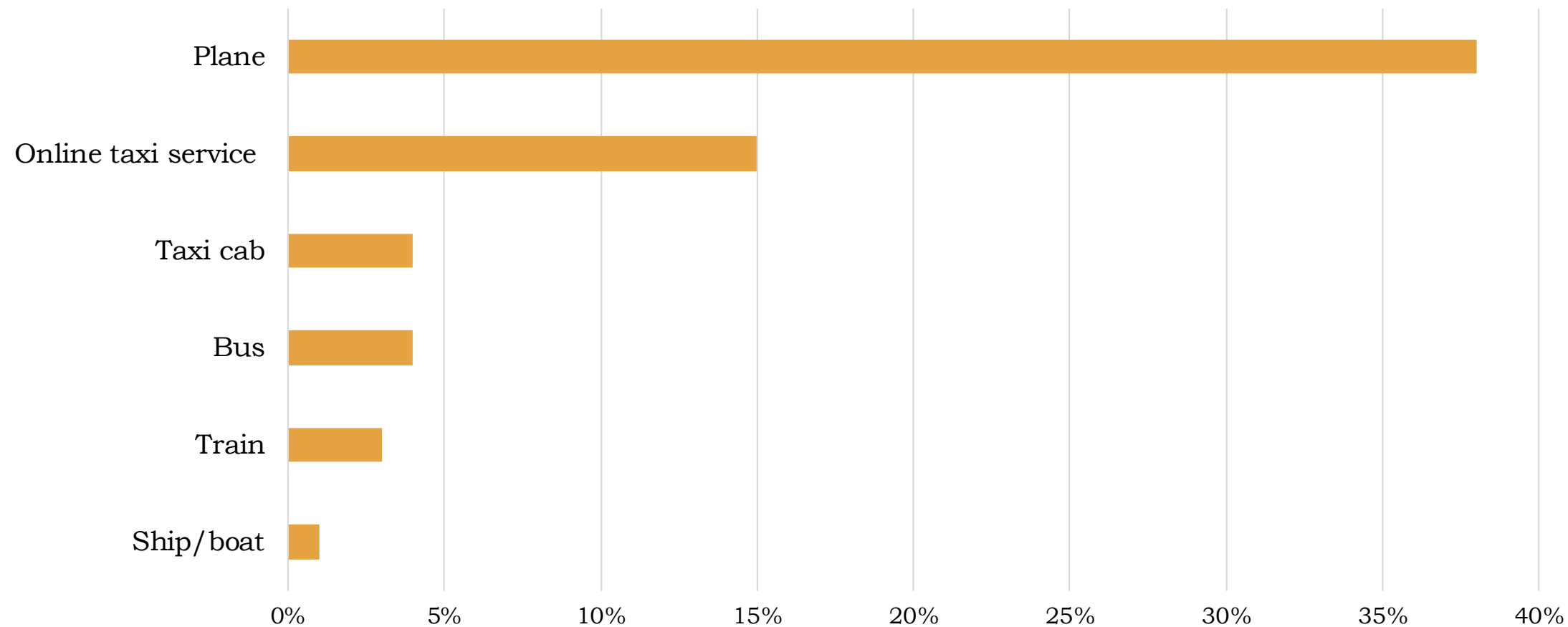


Source: Longwoods International



Transportation – Commercial Vehicles

Phoenix & Central Region

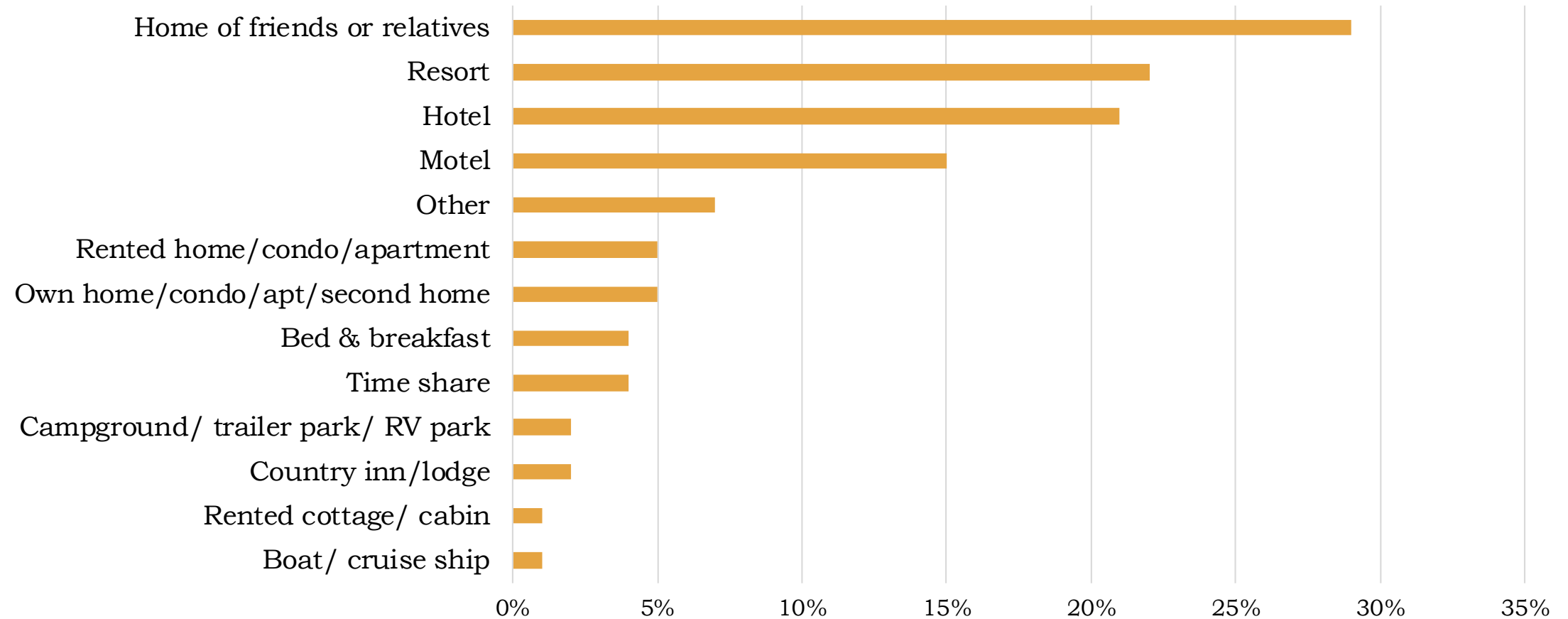


Source: Longwoods International



Accommodation

Phoenix & Central Region

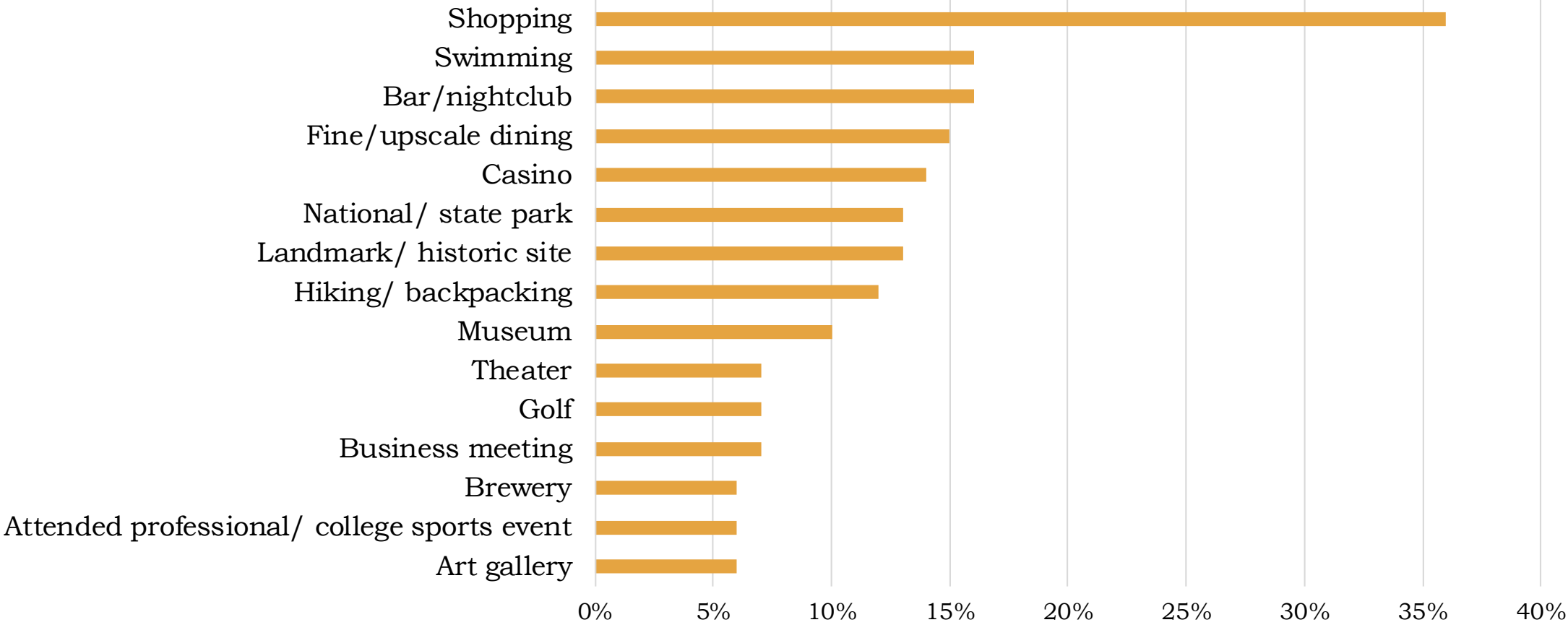


Source: Longwoods International



Activities and Experiences

Phoenix & Central Region

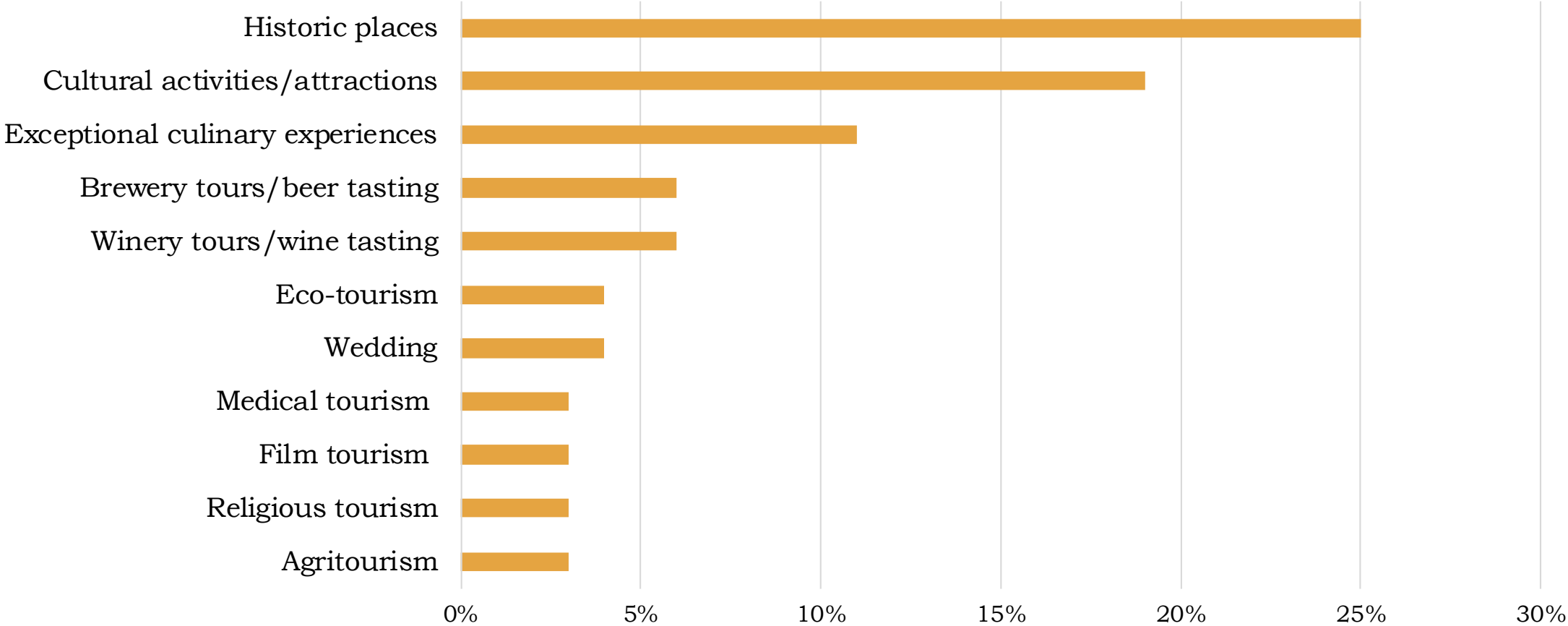


Source: Longwoods International



Activities of Special Interest

Phoenix & Central Region

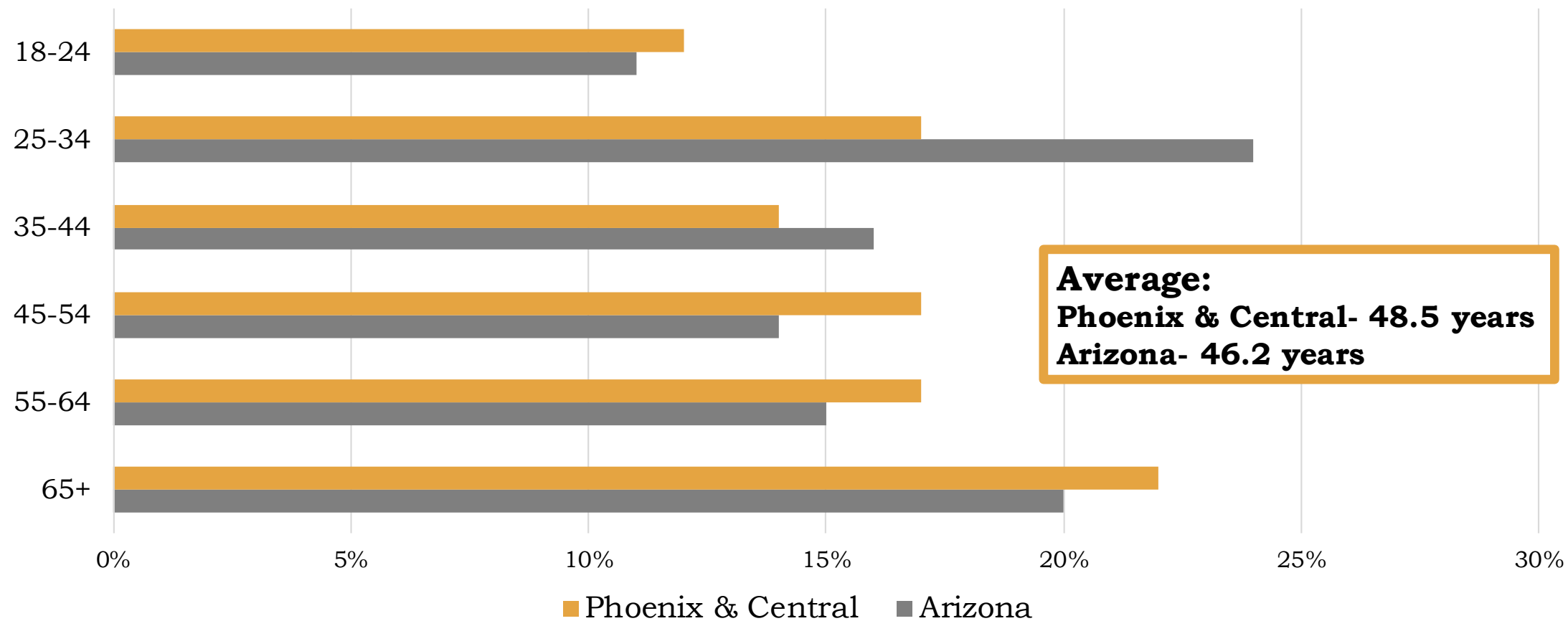


Source: Longwoods International



Age

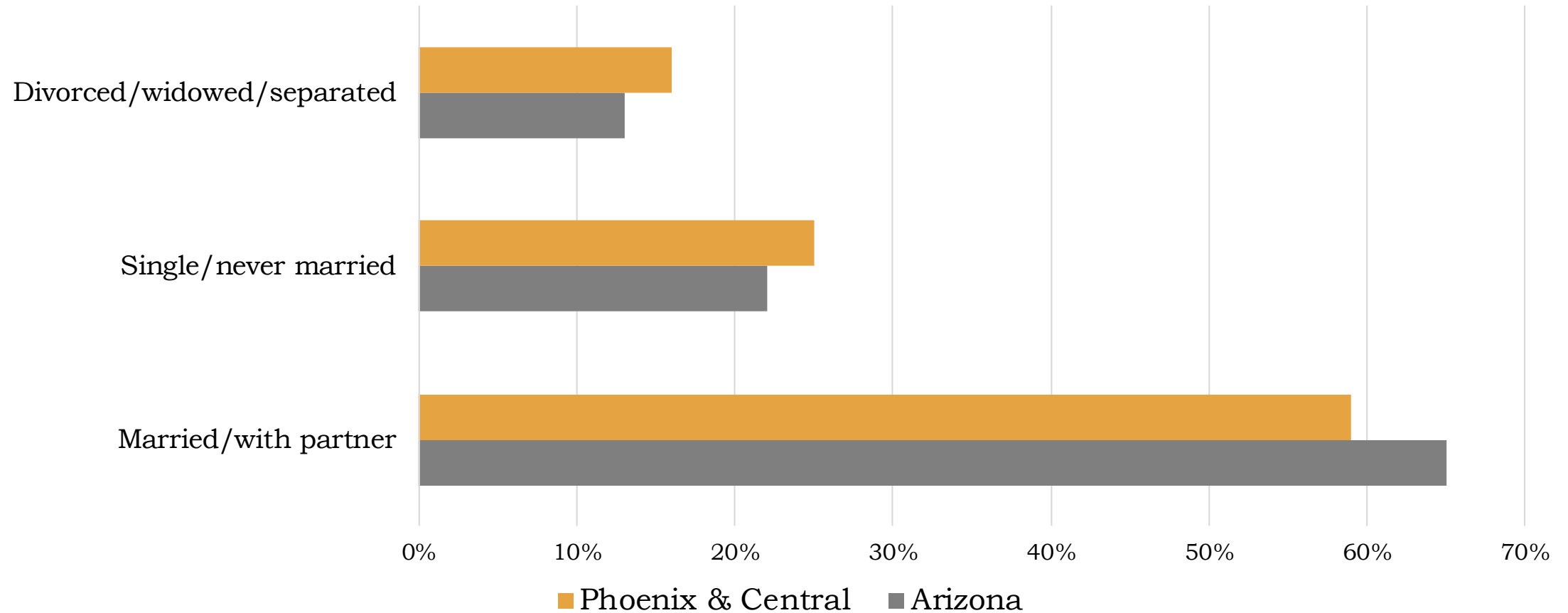
Phoenix & Central Region





Marital Status

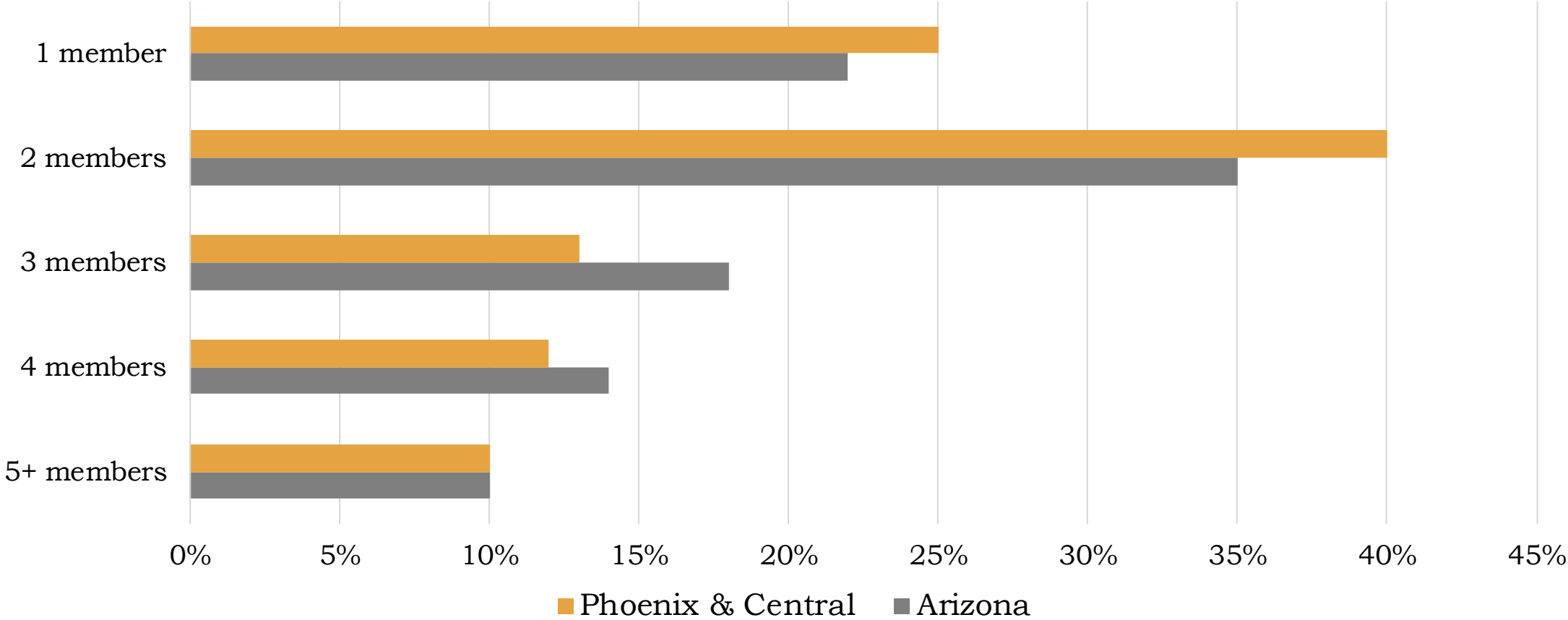
Phoenix & Central Region





Household Size

Phoenix & Central Region

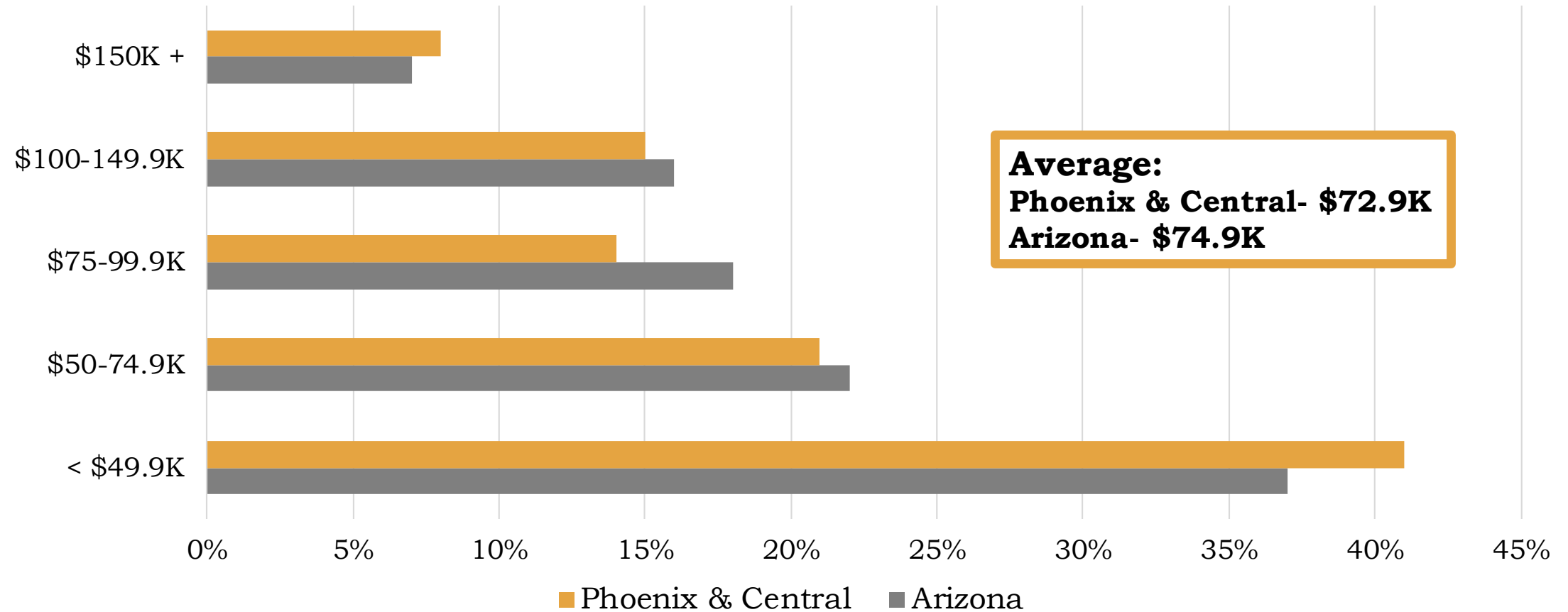


Source: Longwoods International



Household Income

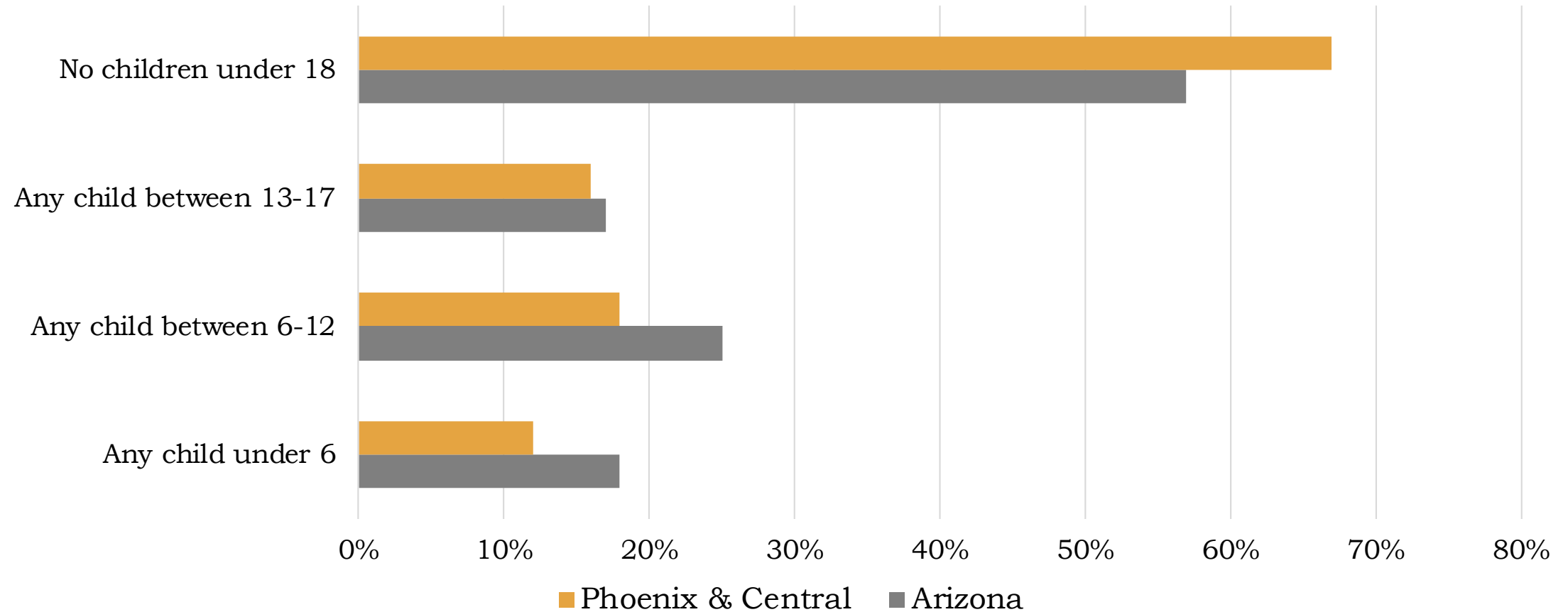
Phoenix & Central Region





Children in Household

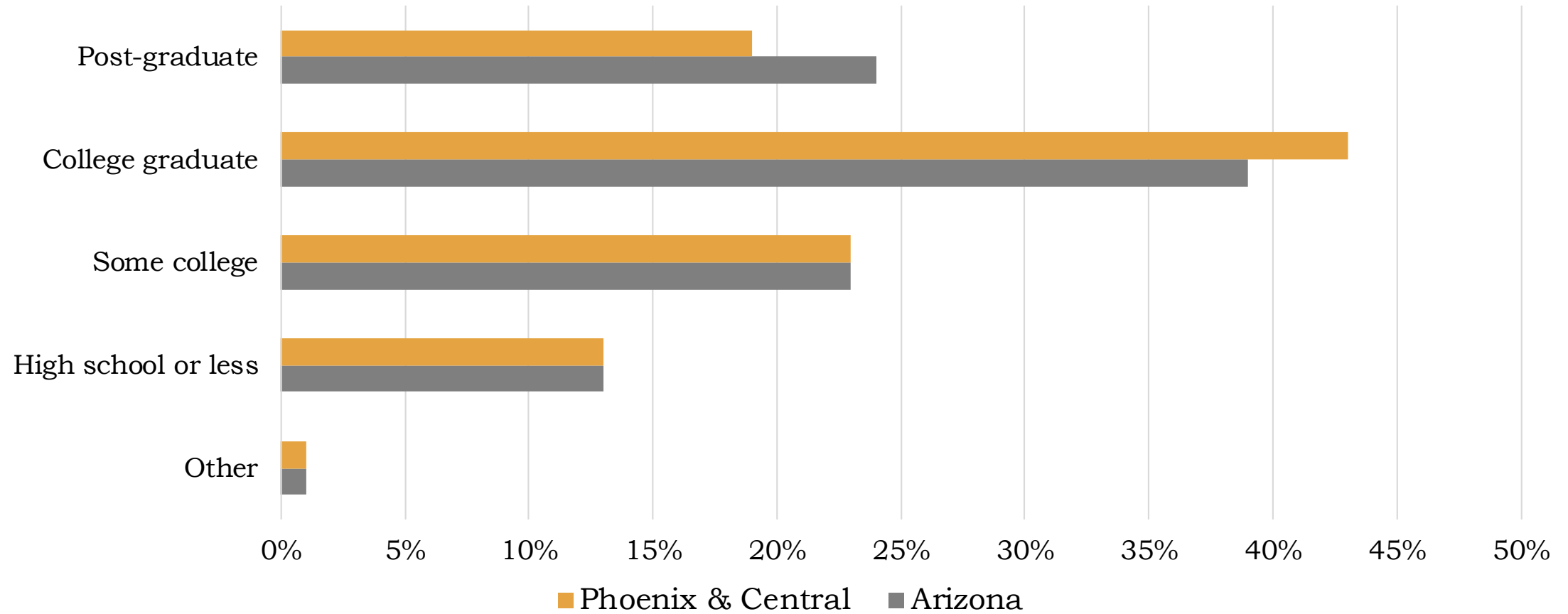
Phoenix & Central Region





Education

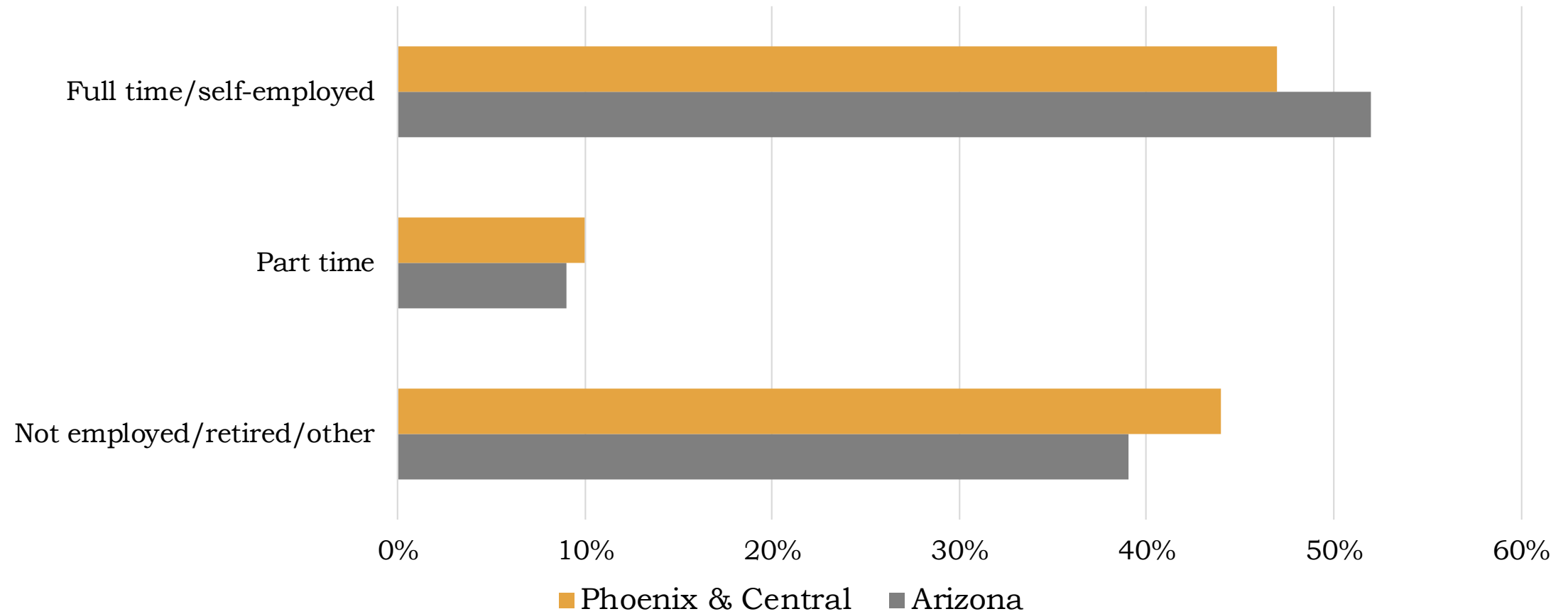
Phoenix & Central Region





Employment

Phoenix & Central Region



Stay Connected



Presentation slides available at:

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

Colleen Floyd
Director of Research
cfloyd@tourism.az.gov
602-364-3716

Kari Roberg
Senior Research Manager
kroberg@tourism.az.gov
602-364-4158

Lena Allen
Marketing & Research Manager
lallen@tourism.az.gov
602-364-3718