

# Arizona Travel Impacts

*2000-2019p*



May 2020

*Prepared for the*

Arizona Office of Tourism  
Phoenix, Arizona

# **Arizona Travel Impacts 2000-2019p**

Arizona Office of Tourism

Primary Research Conducted By  
Dean Runyan Associates  
Portland, Oregon

**May 2020**

# Executive Summary

This report describes the economic impacts of travel to and through Arizona and the state's fifteen counties. The estimates of the direct impacts associated with traveler spending in Arizona were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The estimates for Arizona are generally comparable to the U.S. Travel and Tourism Satellite Accounts produced by the Bureau of Economic Analysis. The estimates of spending, earnings, employment and tax receipts are also used as input data to derive estimates of other economic measures, including gross domestic product (GDP) and secondary effects of the travel industry. The estimates for 2019 are *preliminary*, symbolized by "p" where appropriate. These estimates supersede all prior reports.

## Another Consecutive Year of Strong Growth for the Arizona Travel Industry

The Arizona travel industry had its fifth consecutive year of exceptionally strong growth, following mostly modest increases in spending and related impacts since the recession of 2007 to 2009. This is the tenth consecutive year of industry growth.

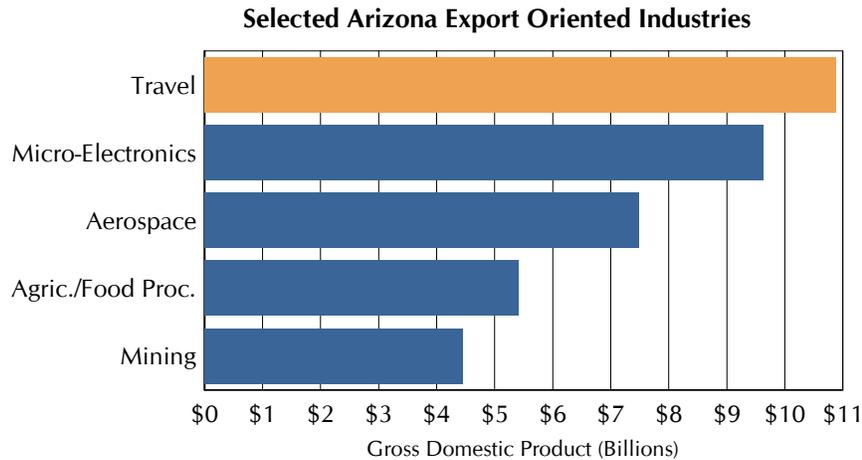
- **Spending.** Total direct travel spending in Arizona was \$25.6 billion 2019p. Non-transportation visitor spending increased by 5.2 percent, following a 7.1 percent increase from 2017 to 2018. Real travel spending increased by 2.8 percent in 2019p.
- **Travel Activity.** Visitor air travel on domestic flights to Arizona destinations increased by 4.6 percent in 2019p, following a 4.4 percent increase the preceding year.[1] Room demand increased by 2.7 percent for 2019, following a 4.1 percent increase the preceding year.[2]
- **Employment.** Direct travel-generated employment was 194,300 in 2019p. This represents an addition of 2,000 jobs, an increase of 1.0 percent.
- **Secondary Impacts.** The re-spending of travel-related revenues by businesses and employees creates secondary impacts. In 2019p, the secondary impacts were 167,000 jobs with \$8.1 billion in earnings.
- **GDP.** The Gross Domestic Product of the travel industry was \$10.9 billion in 2019p. The travel industry and the microelectronics industry have been the top two export-oriented industries in the state in recent years.

[1]. U.S. Department of Transportation Origin and Destination Survey.

[2]. STR, LLC.

## The Arizona Travel Industry is a Leading Export Oriented Industry

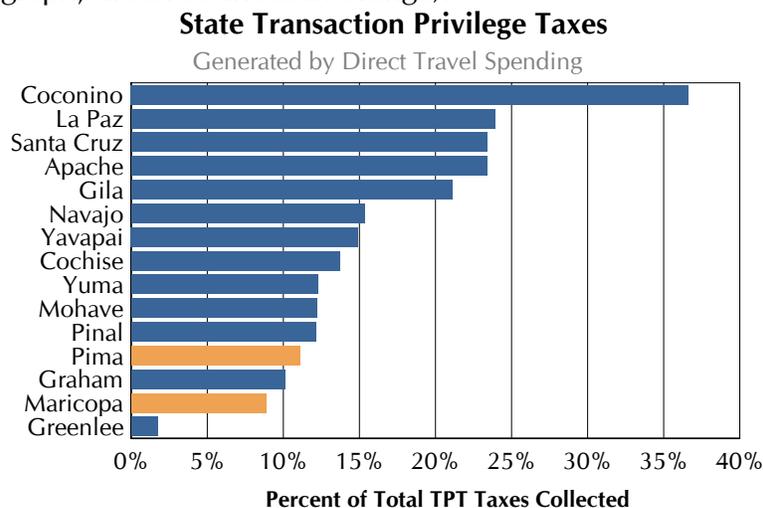
Travel and tourism is one of the most important **“export-oriented”** industries in Arizona. Spending by visitors generates sales in lodging, food services, recreation, transportation and retail businesses - the “travel industry.” These sales support jobs for Arizona residents and contribute tax revenue to local and state governments. Travel is especially important in the non-metropolitan areas of the state, where manufacturing and traded services are less prevalent.



Note: Preliminary 2019 estimates by Dean Runyan Associates. Agriculture includes food and beverage processing industries.

## The Travel Industry Generates Tax Benefits for Arizona Residents

In 2019p, the travel industry generated \$1,400 in local (\$430 tax receipts), state (\$390 tax receipts), and federal (\$580 tax receipts) taxes for each Arizona household. In 2019p, more than 6.5 percent of all local and state tax revenues were generated by the travel industry. The tax revenue impacts are relatively more important in non-urban counties (see graph, urban counties in orange).



## Preface

The purpose of this study is to document the economic significance of the travel industry in Arizona from 2000 to 2019. These findings show the level of travel spending by visitors traveling to and within the state, and the impact this spending had on the economy in terms of earnings, employment and tax revenue.

Dean Runyan Associates prepared this study for the Arizona Office of Tourism. Dean Runyan Associates has specialized in research and planning services for the travel, tourism and recreation industry since 1984. With respect to economic impact analysis, the firm developed and currently maintains the Regional Travel Impact Model (RTIM), a proprietary computer model for analyzing travel economic impacts at the state, regional and local level. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research and travel and tourism planning.

Many individuals and organizations provided data and assistance for this report. State agencies include the Department of Revenue, Commerce Authority, Gaming Commission and State Parks. Information was also provided by the Eller College of Management at the University of Arizona and the Arizona Hospitality Research and Resource Center, a unit of Alliance Bank Economic Policy Institute at Northern Arizona University. Federal agencies that provided essential data for this report include the Bureau of Economic Analysis, the Department of Labor, the Department of Transportation, the U.S. Forest Service, and the National Park Service.

Special thanks are due to Colleen Floyd, Director of Research, and Kari Roberg, Senior Research Manager for the Arizona Office of Tourism. Without their support and assistance, this report would not have been possible.

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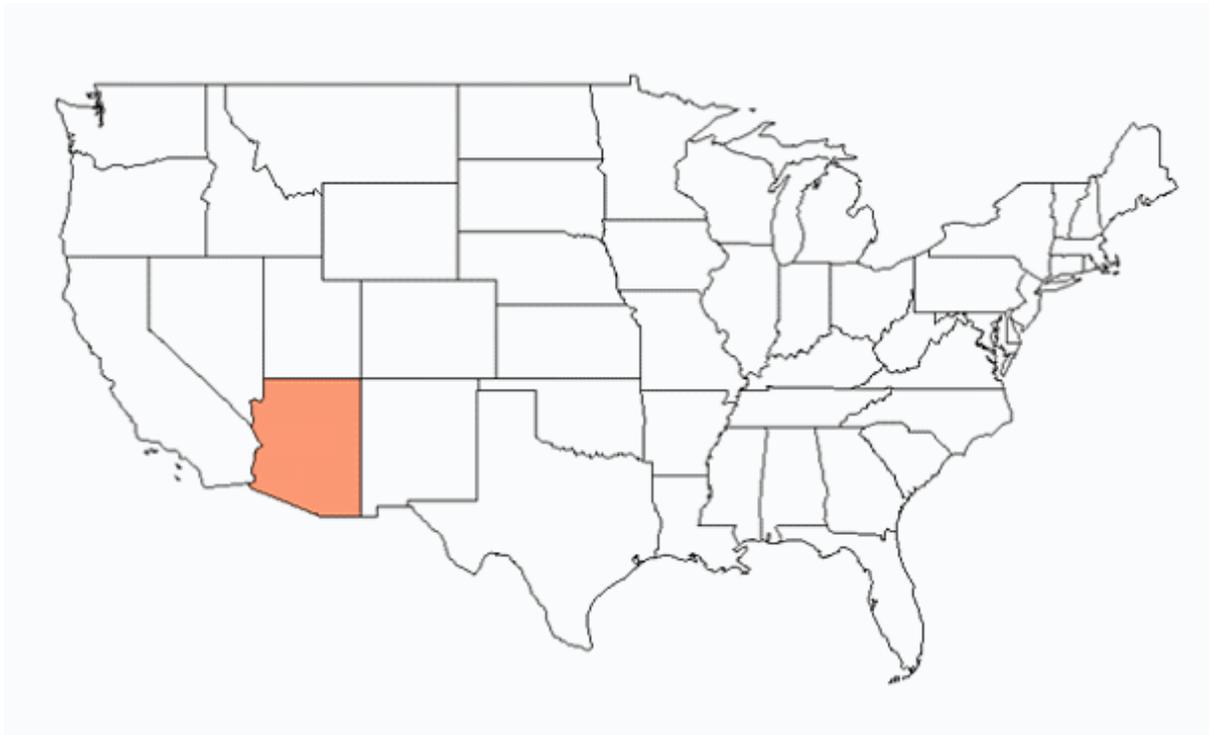
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## I. ARIZONA TRAVEL



The multi-billion dollar travel industry in Arizona is an important part of the state and local economies. The industry is represented primarily by businesses in the leisure and hospitality sector, transportation, and retail. The money that visitors spend on various goods and services while in Arizona produces business receipts at these firms, which in turn generate earnings and employment for Arizona residents. In addition, state and local governments collect taxes that are generated from visitor spending. Most of these taxes are imposed on the sale of goods and services to visitors, thus avoiding a tax burden on local residents.

The economic impacts directly generated by visitor spending also contribute to significant secondary impacts. A portion of the business receipts generated by visitor spending is spent by businesses within Arizona for other goods and services (indirect impacts). Visitor generated earnings are also spent by employees for goods and services produced in Arizona (induced impacts).

### **Summary of Arizona Travel**

- Total direct travel spending in Arizona was \$25.6 billion in 2019p. The increase of 4.7 percent was due to the increase in motor fuel prices and strong growth in commercial lodging spending. Non-transportation visitor spending increased by 5.2 percent, following a 7.1 percent increase from 2017 to 2018. Travel spending in real (inflation-adjusted) dollars has increased by 2.8 percent in 2019p.
- Lodging sales increased by 9.3 percent in 2019 following a 10.1 percent increase the preceding year. The strong growth in room sales over that past three years has been equally attributable to increased room rates and room demand (STR, LLC).
- Visitor air travel on domestic flights to Arizona destinations increased by 4.6 percent in 2019p, following a 4.4 percent increase the preceding year. Visitor air arrivals to the state have increased an average of 5.5 percent per year since 2014.
- Direct travel-generated employment was 194,300 in 2019p. This represents an addition of 1,900 jobs, an increase of 1.0 percent. (See detailed employment estimates, page 9.)
- The Gross Domestic Product of the travel industry was \$10.9 billion in 2019p. The travel industry and the microelectronics industry have been the top two export-oriented industries in the state in recent years.
- The re-spending of travel-related revenues by businesses and employees creates secondary impacts. In 2019p, the secondary impacts were 167,000 jobs with \$8.1 billion in earnings.

## Travel Trends

The Arizona travel industry experienced strong growth in 2019. Travel spending increased by 4.7 percent from 2018 to 2019p, following a 7.8 percent increase the preceding year. Non-transportation visitor spending increased by 5.2 percent in 2019p, compared to a 7.1 percent increase the preceding year[1]. Earnings, employment and tax revenue have also experienced substantial growth over the past two years.

### Direct Travel Impacts, 2000-2019p

	2000	2005	2010	2018	2019	Ave. Annual %Chg. 18-19p	00-19p
<b>Spending (\$Billions)</b>							
Total (Current \$)	13.7	16.9	17.8	24.4	25.6	4.7%	3.3%
Other	1.7	1.9	2.0	2.9	3.1	3.4%	3.3%
Visitor	12.1	15.0	15.7	21.5	22.5	4.9%	3.3%
Non-transportation	9.4	11.1	11.1	15.7	16.6	5.2%	3.0%
Transportation	2.7	3.9	4.6	5.8	6.0	4.0%	4.3%
<b>Earnings (\$Billions)</b>							
Earnings (Current \$)	3.9	4.6	5.0	7.4	7.7	3.7%	3.6%
<b>Employment (Thousands)</b>							
Employment	160.7	165.9	155.9	192.3	194.3	1.0%	1.0%
<b>Tax Revenue (\$Millions)</b>							
Total (Current \$)	1,937	2,332	2,516	3,625	3,778	4.2%	3.6%
Local	549	652	698	1,111	1,161	4.5%	4.0%
State	534	694	738	1,010	1,051	4.1%	3.6%
Federal	854	987	1,079	1,505	1,566	4.1%	3.2%

**Other spending** includes resident air travel, travel arrangement and reservation services, and convention and trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

**Earnings** include wages & salaries, earned benefits and proprietor income.

**Employment** includes all full- and part-time employment of payroll employees and proprietors.

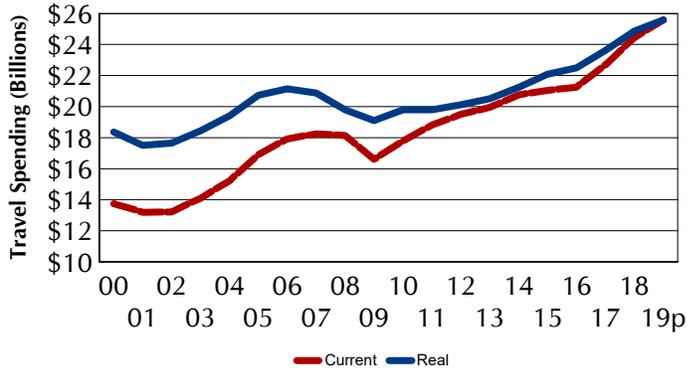
**Local tax revenue** includes lodging taxes, sales taxes, auto rental taxes and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

**State tax revenue** includes lodging, sales and motor fuel tax payments of visitors, and the income tax and sales tax payments attributable to the travel industry income of businesses and employees.

**Federal tax revenue** includes motor fuel excise taxes and airline ticket taxes paid by visitors, and the payroll and income taxes attributable to the travel industry income of employees and businesses.

[1]. Statewide travel trends for 2010 through 2019p are shown on pages 37 through 41 of the county section.

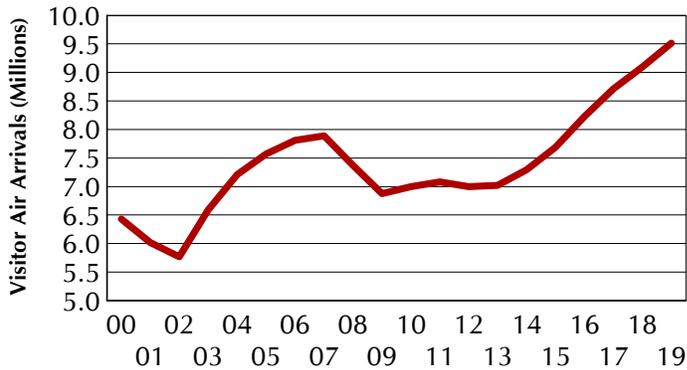
### Arizona Direct Spending Real and Current Dollars



In real dollars (adjusted for inflation) Arizona travel spending increased by 2.8 percent over 2018. In current dollars, the increase was 4.6 percent.

Sources: STR, LLC, Energy Information Administration, U.S. Department of Transportation Origin and Destination Survey, and Bureau of Labor Statistics CPI-West Urban.

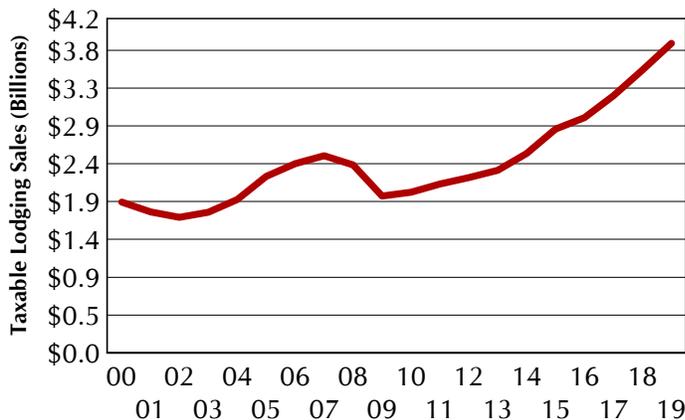
### Air Passenger Visitor Arrivals to Arizona U.S. Air Carriers



Visitor air arrivals to Arizona increased by 4.6 percent from 2018 to 2019, following a 4.4 percent increase the preceding year. From 2009 through 2013, visitor air arrivals were essentially flat.

Sources: U.S. Department of Transportation Origin and Destination Survey and Dean Runyan Associates.

### Arizona Taxable Lodging Sales



Lodging sales is another indicator of the strength of the travel industry as it reflects the profitability of one of its key sectors. Taxable lodging sales increased by 9.4 percent annually from 2018 to 2019 following a 10.1 percent increase the preceding year.

Sources: Arizona Department of Revenue and STR, LLC

## Seasonal and Regional Travel Impacts

Lodging sales are used in this section to document seasonal patterns in the Arizona tourism industry. (Lodging sales are used because travel spending and related impacts are estimated only on a calendar year basis.)

The pie chart shows the annual distribution of lodging sales by region. The lodging sales of the Phoenix and Central Arizona region are greater than the four other regions combined.

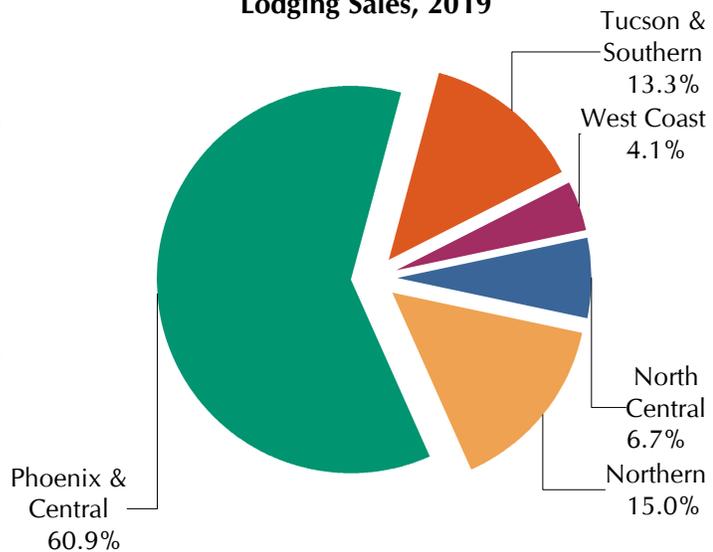
*The Northern Arizona region includes Apache, Coconino and Navajo counties. The West Coast region includes La Paz, Mohave and Yuma counties. The North Central region includes Gila and Yavapai counties. The Phoenix and Central Arizona region includes Maricopa and Pinal counties. The Tucson and Southern Arizona region includes Cochise, Graham, Greenlee, Pima and Santa Cruz counties.*

The next two graphs provide quarterly breakouts for the regions and the state.

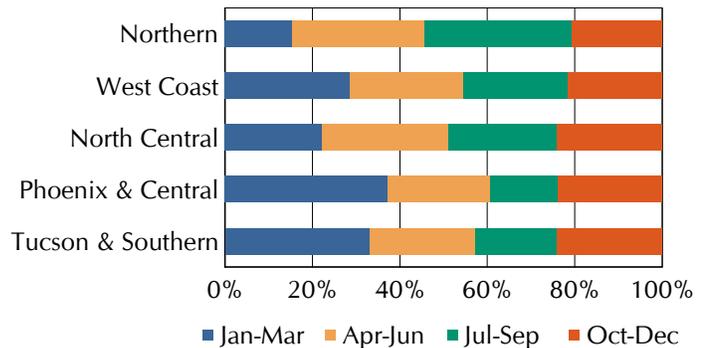
Lodging sales are greatest in the first quarter for three of Arizona's tourism regions - the West Coast, Phoenix and Tucson. By contrast, spring and summer quarters are most important for the Northern and North Central regions.

The bottom column chart provides a statewide quarterly breakout of lodging sales in two year increments beginning in 2011. Lodging sales have increased in all four quarters since the prior 2007 peak.

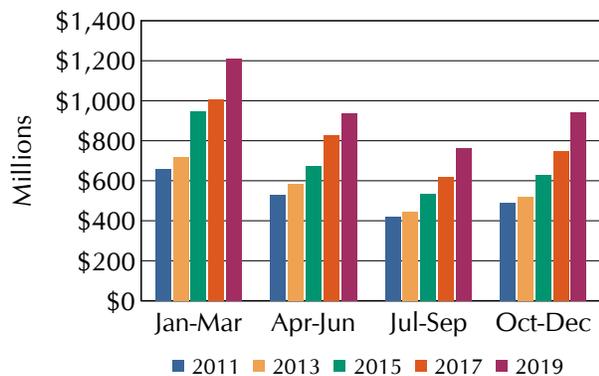
**Regional Shares of Arizona Taxable Lodging Sales, 2019**



**Taxable Lodging Sales by Region and Quarter, 2019**



**Arizona Taxable Lodging Sales by Quarter**



Source: Arizona Department of Revenue taxable hotel/motel sales.

## Visitor Origin

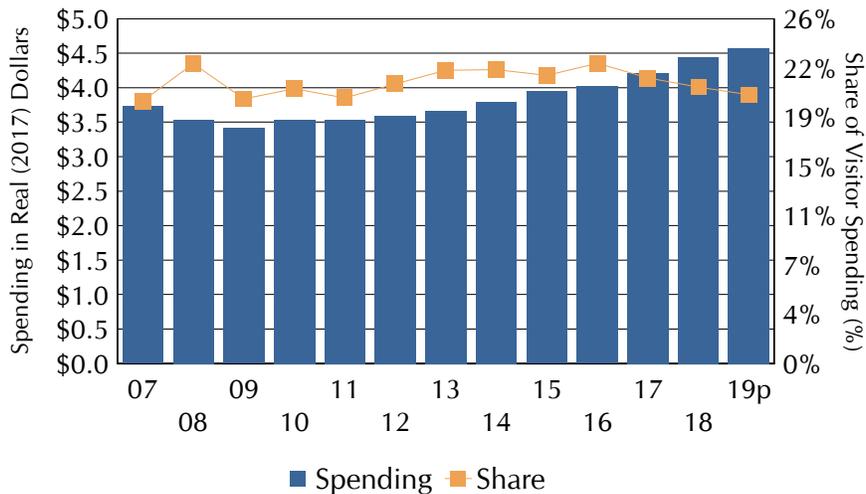
Out-of-state travelers generate more than three-fourths of the visitor impacts in Arizona. Visitors from other states are the largest segment (more than 56 percent of spending), while international travel, including day travel from Mexico, comprises approximately 20 percent of visitor impacts. The share has declined slightly in the past three years due to the decreased value of foreign currencies relative to the U.S. dollar.

### Arizona Travel Impacts by Origin of Visitor, 2019p

Origin	Spending (\$Billions)	Earnings (\$Billions)	Employment (Thousands)	Tax Receipts (\$Millions)	
				Local/State	Federal
All Visitors	22.5	6.5	178.6	2,186	1,388
Arizona	4.7	1.1	33.5	426	238
Other U.S.	13.3	4.2	109.3	1,297	940
International	4.6	1.2	35.7	463	210
Other Travel	3.1	1.1	15.7	26	178
<b>Total Travel</b>	<b>25.6</b>	<b>7.7</b>	<b>194.3</b>	<b>2,212</b>	<b>1,566</b>

Sources: Dean Runyan Associates, OmniTrak TravelTrakAmerica visitor survey, Statistics Canada, Vera Pavlakovich-Kochi and Alberta H. Charney, "Mexican Visitors to Arizona: Visitor Characteristics and Economic Impacts, 2007-08" (Karl Eller College of Business and Public Administration, University of Arizona) and Bureau of Transportation Statistics Border Crossing/Entry Data.

### International Visitor Spending in Arizona

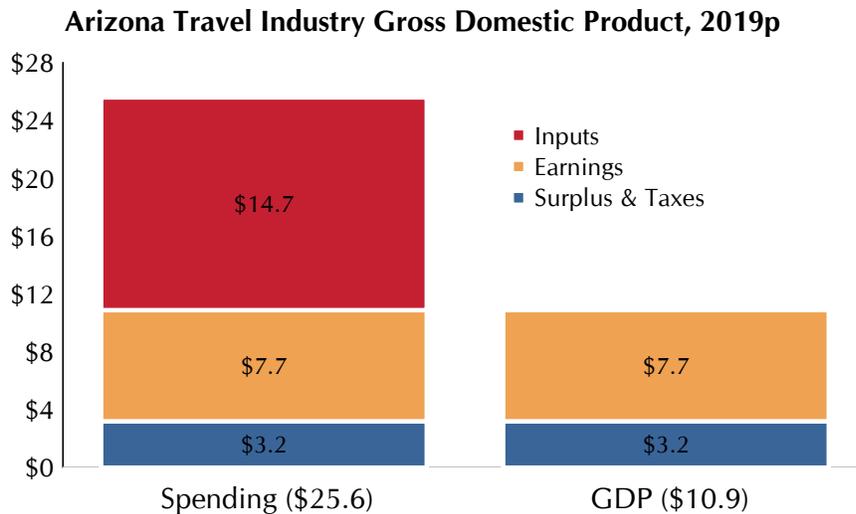


Sources: See above chart for source of international estimates. See first graph on preceding page for constant dollar estimates. Constant dollar visitor spending does not include "Other Travel."

## Arizona Travel Industry Gross Domestic Product

In concept, the Gross Domestic Product (GDP) of a particular industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always smaller than output or sales because GDP measures only the “value added” of an industry and does not include the cost of the inputs that are also necessary to produce a good or service. Alternatively, GDP can be thought of as the sum of earnings, indirect business taxes (primarily excise and property taxes) and other operating surplus (including profits). Estimates of travel spending and travel industry GDP are shown in the chart below. Arizona travel industry GDP amounted to \$10.9 billion in 2019p. Arizona travel industry GDP represents about 3.0 percent of total state GDP in recent years.

About 60 percent of all travel spending in Arizona is attributed to intermediate inputs and goods resold at retail. Intermediate inputs cover a range of goods and services that are purchased by travel industry businesses for the purpose of creating a product or service for the traveler. For example, lodging establishments purchase cable television services. Restaurants purchase food and beverages from vendors. In both cases, these inputs are classified as the GDP of other industries. In addition, travel spending occurs at many retail establishments where the goods purchased from the retailer are purchased as finished goods from suppliers. These resold goods are also counted as products of other industries. This would include motor fuel, groceries and most of the commodities sold at retail establishments[2].



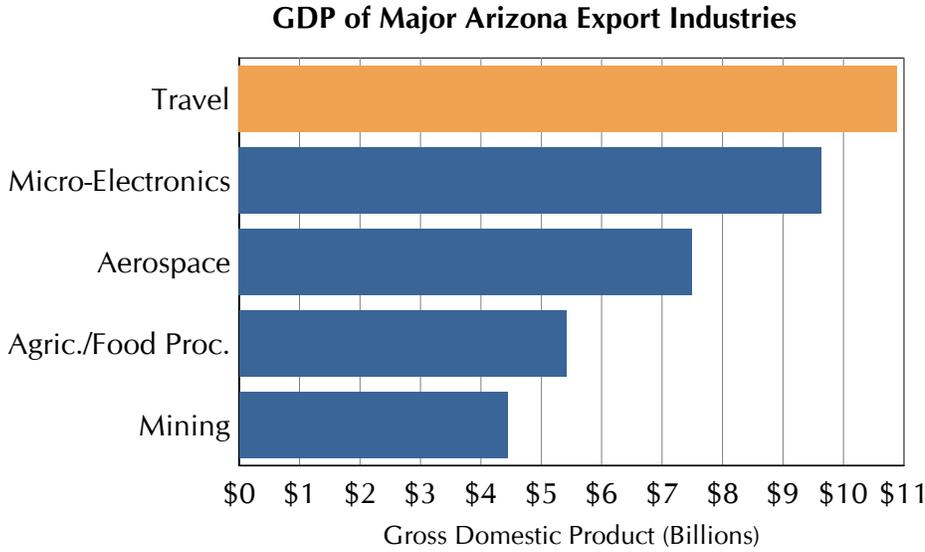
Sources: Dean Runyan Associates, Bureau of Economic Analysis, and Implan Group, LLC. Details may not add to totals due to rounding.

[2]. About 40 percent of the \$14.7 billion of inputs and goods resold are purchased from other Arizona businesses.

# Gross Domestic Product of Arizona Export-Oriented Industries

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations. Agriculture, mining, and manufacturing are the best examples of export-oriented industries. Clearly, there are cases in each of these three sectors where the products are sold within the local or regional market. Nonetheless, in general most businesses within these industries depend on export markets. The travel industry is also an export-oriented industry because goods and services are sold to *visitors*, rather than residents. The travel industry injects money into the local economy, as do the exports of other industries.

Exports are not necessarily more important than locally traded goods and services. However, diverse export-oriented industries in any economy are a source of strength - in part because they generate income that contributes to the development of other local services and amenities. Such industries characterize the “comparative advantage” of the local economy within larger regional, national and global markets. A comparison of the GDP’s of the leading export-oriented industries in Arizona is shown below.



Source: Bureau of Economic Analysis, Bureau of Labor Statistics and Dean Runyan Associates. 2019 estimates for non-travel industries based on 2018 GDP and 2019 three quarters of earnings and payroll.

## Direct, Secondary and Total Impacts

Travel spending within Arizona brings money into many Arizona communities in the form of business receipts. Portions of these receipts are spent within the state for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. This re-spending of travel-related revenues creates *indirect and induced impacts*. To summarize:

- **Direct** impacts represent the employment and earnings attributable to travel expenditures made directly by travelers at businesses throughout the state.
- **Indirect** impacts represent the employment and earnings associated with industries that supply goods and services to the direct businesses (i.e., those that receive money directly from travelers throughout the state).
- **Induced** impacts represent the employment and earnings that result from purchases for food, housing, transportation, recreation, and other goods and services made by travel industry employees, and the employees of the indirectly affected industries.

The impacts in this section are presented in terms of the employment and earnings of eleven major industry groups. These industry groups are similar, but not identical to the business service (or commodity) categories presented elsewhere in this report. (The specific industries that comprise these major groups are listed in Appendix D.) Direct travel impacts, such as those discussed in the first part of this section and the regional and county impacts presented elsewhere in this report are found in the following industry groups:

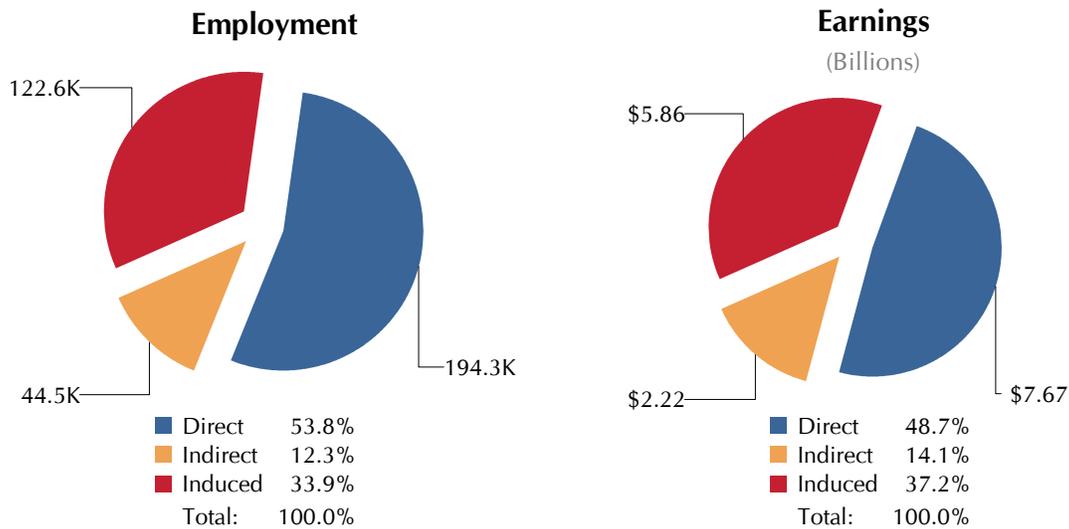
- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Trade**
- **Transportation**

As is indicated in the following tables and graphs, the total direct employment and earnings of these four industry groups is identical to the total direct employment and earnings shown in the first part of this section. The only difference is that these industry groups represent industry groupings (firms) rather than commodity or business service groupings.

The indirect and induced impacts of travel spending are found in all thirteen industry groupings shown in the following tables and graphs. To summarize the primary secondary impacts:

- **Professional & Business Services** (36,000 jobs and \$2.5 billion earnings). A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses (indirect effect). Employees of these firms also purchase professional services (induced effect).
- **Other Services** (14,850 jobs and \$550 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops. Similarly, travel businesses utilize a number of service providers, such as laundry, maintenance and business services.
- **Government** (26,900 jobs and \$1.8 billion earnings). Employees of travel-related businesses pay fees to attend public educational institutions and to operate motor vehicles.
- **Finance, Insurance and Real Estate** (12,450 jobs and \$713 million earnings). Employees and businesses use the services of financial institutions, insurers and real estate businesses.

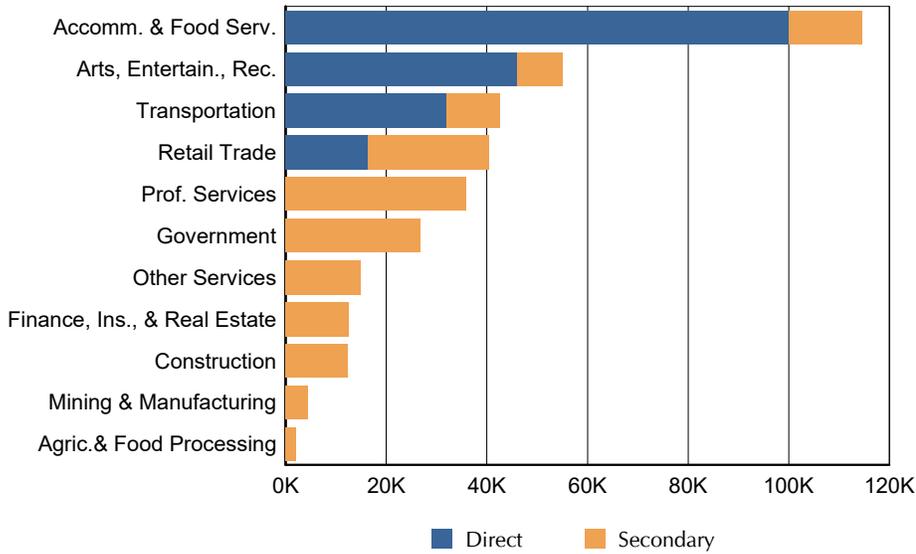
### Total Employment and Earnings Generated by Travel Spending in Arizona, 2019p



Sources: Dean Runyan Associates with IMPLAN GROUP, LLC. Total employment was 361,300 jobs. The employment multiplier for 2019 is 1.86 (361.33/194.31). Total earnings were \$15.75 Billion. The earnings multiplier is 2.05 (15.75/7.67).

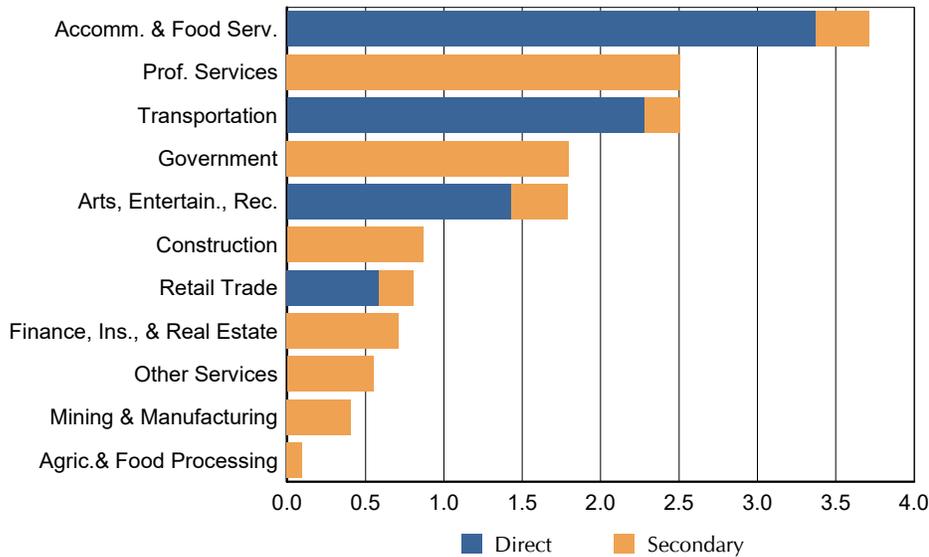
## Direct and Secondary Employment

Generated by Travel Spending in Arizona



## Direct and Secondary Earnings

Generated by Travel Spending in Arizona



Detailed estimates are reported in the following table. It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire state of Arizona and do not necessarily reflect economic patterns for individual counties, regions or sub-regions within the state. While total economic impacts can be calculated on a county or regional level, such a detailed analysis is not included in this study. In general, geographic areas with lower levels of aggregate economic activity will have smaller secondary impacts within those same geographic boundaries.

**Direct and Secondary Travel-Generated Earnings in Arizona, 2019p**  
(\$Million)

<b>Industry Group</b>	<b>Direct</b>	<b>Secondary</b>			<b>Grand Total</b>
		<b>Indirect</b>	<b>Induced</b>	<b>Total</b>	
Accomm. & Food Serv.	3,373	104	234	338	3,711
Arts, Entertain., Rec.	1,430	279	79	358	1,788
Retail Trade	587	18	200	217	804
Transportation	2,277	175	52	227	2,504
All Industries	7,667	2,217	5,862	8,079	15,746
Agric. & Food Processing		46	50	96	96
Construction		69	799	868	868
Finance, Ins., & Real Estate		249	464	713	713
Government		120	1,677	1,798	1,798
Mining & Manufacturing		155	254	408	408
Other Services		265	285	550	550
Prof. Services		739	1,769	2,508	2,508

**Direct and Secondary Travel-Generated Employment in Arizona, 2019p**  
(thousand jobs)

<b>Industry Group</b>	<b>Direct</b>	<b>Secondary</b>			<b>Grand Total</b>
		<b>Indirect</b>	<b>Induced</b>	<b>Total</b>	
Accomm. & Food Serv.	100.0	4.5	10.0	14.5	114.5
Arts, Entertain., Rec.	46.1	6.3	2.6	8.9	55.0
Retail Trade	16.3	3.4	20.7	24.1	40.4
Transportation	32.0	5.8	4.7	10.5	42.4
All Industries	194.3	44.5	122.6	167.0	361.3
Agric. & Food Processing		1.0	1.1	2.1	2.1
Construction		1.0	11.3	12.3	12.3
Finance, Ins., & Real Estate		4.6	7.9	12.5	12.5
Government		1.3	25.6	26.9	26.9
Mining & Manufacturing		1.6	2.7	4.4	4.4
Other Services		5.9	8.9	14.9	14.9
Prof. Services		9.1	26.9	36.0	36.0

Source: Dean Runyan Associates and Minnesota Implan Group.

Note: These industry groups are not equivalent to the categories used in the direct impact tables used in this report. See Appendix G. Details may not add to totals due to rounding.

Detailed direct travel impacts for 2010 through 2019 follow:

## Arizona Direct Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Billion)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	15.7	17.1	17.5	18.2	18.5	18.6	19.9	21.5	22.5
Other Travel*	2.0	2.4	2.5	2.6	2.6	2.6	2.8	2.9	3.1
<b>Total</b>	<b>17.8</b>	<b>19.5</b>	<b>19.9</b>	<b>20.8</b>	<b>21.0</b>	<b>21.2</b>	<b>22.7</b>	<b>24.4</b>	<b>25.6</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Billion)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	7.0	7.7	7.9	8.4	8.9	9.2	9.9	10.9	11.6
Private Home	3.9	4.2	4.3	4.4	4.4	4.4	4.6	4.9	5.1
Campground	0.6	0.7	0.7	0.7	0.7	0.6	0.7	0.7	0.8
Vacation Home	0.7	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8
Day Travel	3.5	3.8	3.8	3.9	3.7	3.6	3.9	4.1	4.2
<b>Total</b>	<b>15.7</b>	<b>17.1</b>	<b>17.5</b>	<b>18.2</b>	<b>18.5</b>	<b>18.6</b>	<b>19.9</b>	<b>21.5</b>	<b>22.5</b>
<b>Visitor Spending by Commodity Purchased (\$Billion)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	2.4	2.6	2.7	3.0	3.3	3.5	3.8	4.1	4.5
Food Service	3.4	3.6	3.7	3.9	4.2	4.4	4.7	5.1	5.4
Food Stores	0.9	0.9	0.9	1.0	1.0	1.0	1.0	1.0	1.1
Local Tran. & Gas	3.1	3.8	3.7	3.8	3.2	2.9	3.2	3.6	3.7
Arts, Ent. & Rec.	2.1	2.1	2.2	2.2	2.3	2.4	2.5	2.6	2.7
Retail Sales	2.4	2.5	2.5	2.6	2.6	2.6	2.7	2.8	2.9
Visitor Air Tran.	1.5	1.6	1.6	1.8	1.9	1.9	2.0	2.1	2.3
<b>Total</b>	<b>15.7</b>	<b>17.1</b>	<b>17.5</b>	<b>18.2</b>	<b>18.5</b>	<b>18.6</b>	<b>19.9</b>	<b>21.5</b>	<b>22.5</b>
<b>Industry Earnings Generated by Travel Spending (\$Billion)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	2.1	2.2	2.3	2.5	2.7	2.8	3.0	3.2	3.4
Arts, Ent. & Rec.	0.9	1.0	1.0	1.1	1.1	1.2	1.3	1.4	1.4
Retail**	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.7
Ground Tran.	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.6	0.6	0.6	0.6	0.7	0.7	0.8	0.8	0.8
Other Travel*	0.8	0.9	1.0	1.0	1.0	1.0	1.1	1.1	1.1
<b>Total</b>	<b>5.0</b>	<b>5.4</b>	<b>5.5</b>	<b>5.8</b>	<b>6.2</b>	<b>6.5</b>	<b>7.0</b>	<b>7.4</b>	<b>7.7</b>
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	80.1	83.2	86.1	88.7	92.2	95.1	97.0	99.3	100.0
Arts, Ent. & Rec.	35.6	36.6	37.3	39.7	41.3	41.9	43.1	45.0	46.1
Retail**	16.8	16.6	16.9	17.6	18.1	18.4	18.4	18.4	18.3
Ground Tran.	3.5	3.7	3.8	3.9	4.1	4.4	4.9	5.1	5.3
Visitor Air Tran.	7.1	7.5	7.2	7.6	8.1	8.2	8.4	8.7	8.8
Other Travel*	12.8	14.9	14.3	15.3	15.7	16.1	16.1	15.7	15.7
<b>Total</b>	<b>155.9</b>	<b>162.5</b>	<b>165.6</b>	<b>172.7</b>	<b>179.5</b>	<b>184.2</b>	<b>187.9</b>	<b>192.3</b>	<b>194.3</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	698	735	756	787	856	893	953	1,111	1,161
State Tax Receipts	738	825	805	796	839	859	933	1,010	1,051
Federal Tax Receipts	1,079	1,057	1,172	1,230	1,304	1,341	1,423	1,505	1,566
<b>Total</b>	<b>2,516</b>	<b>2,617</b>	<b>2,733</b>	<b>2,814</b>	<b>2,999</b>	<b>3,093</b>	<b>3,309</b>	<b>3,625</b>	<b>3,778</b>

Details may not add to totals due to rounding.

\*Other Travel includes resident air travel, travel arrangements & reservation services, and convention & trade organizers.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rentals.

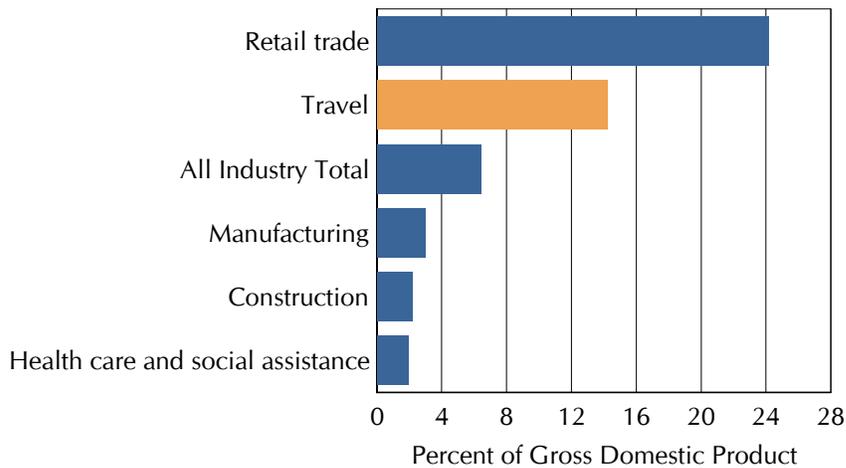
## II. STATE AND LOCAL GOVERNMENT REVENUE

This section is concerned with the contribution of the Arizona travel industry to state and local government finance. The first part of the report compares the travel industry to various other sectors of the state economy. The remainder provides an overview of state and local finance and the revenue contribution of the travel industry.

### Industry Gross Domestic Product and Taxes

One way to consider the tax contributions of various sectors of the economy is to express the tax payments of businesses to government as a percentage of Gross Domestic Product. The bar chart and accompanying table show these tax payments (taxes on production and imports or TOPI) for a sample of goods-producing and service sectors in the state, including travel. TOPI include most of the taxes paid by the business firm to local, state and federal governments except for income taxes. This includes property taxes, licenses and fees and the sales and excise taxes collected from consumers. It is because of these later taxes that retail trade and travel have relatively high proportions of tax payments in relation to their gross domestic products.

**Production & Import Taxes as a Percent of GDP**  
Selected Arizona Industry Sectors, 2019p Calendar Year



Sources: Bureau of Economic Analysis and Dean Runyan Associates.

\*TOPI denotes taxes on production and imports less subsidies.

GDP & TOPI expressed in \$Million.

For non travel industries TOPI estimated from 2017 data. BEA latest release as of May 2020

	GDP	*TOPI	Percent
Construction	18,675	412	2.2%
Health Care	31,707	626	2.0%
Manufacturing	31,817	953	3.0%
Retail Trade	25,453	6,152	24.2%
Travel	10,887	1,547	14.2%
All Industries	364,607	23,401	6.4%

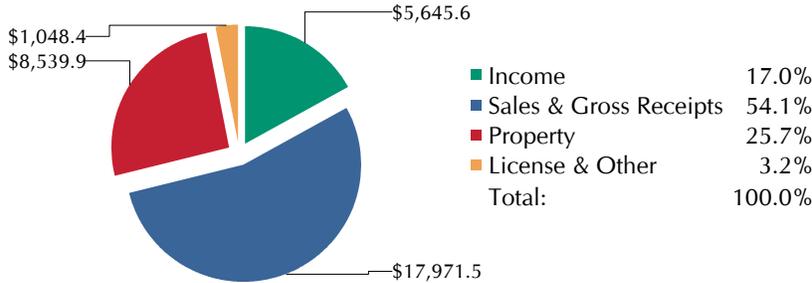
The remainder of this report will focus on the travel industry and the specific tax contributions made to state and local government in Arizona. In addition to the taxes on production discussed in the previous section, the tax payments of travel industry employees derived from the income earned from travel industry businesses will be included.[1] The three primary sources of tax revenue generated by the travel industry are:

- Sales tax receipts generated by **visitor spending**. This includes local and state sales taxes, lodging taxes, alcoholic beverage taxes, motor vehicle rental taxes and motor fuel taxes.
- Taxes paid by **travel industry businesses** attributable to travel generated business receipts (property and income taxes).
- Taxes paid by **travel industry employees** attributable to travel generated earnings (sales and property taxes).

**Arizona Tax Structure**

The pie chart below, adapted from the Bureau of the Census’ State and Local Government Finance and other data sources, shows the main categories of tax revenue in Arizona. Approximately one-half of all tax revenue is derived from sales and gross receipts taxes. Property taxes, paid primarily by homeowners and businesses to local governments, constitute more than one-fourth of all tax revenue.

**Arizona State and Local Government Tax Revenues**  
2018-2019 Fiscal Year (\$Millions)



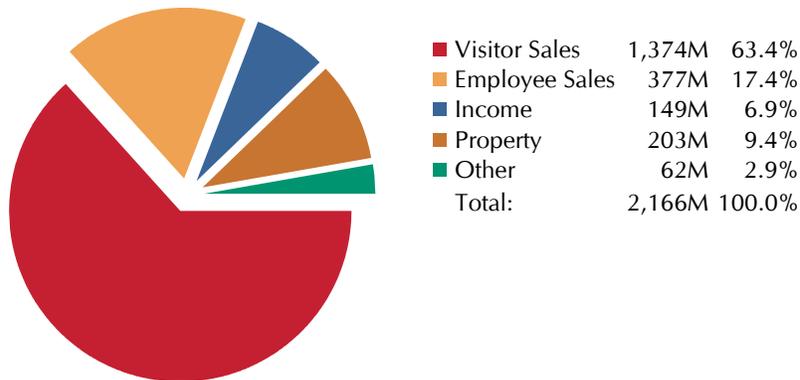
Sources: The 2018-19 fiscal year estimates of state and local tax revenues in Arizona were prepared by Dean Runyan Associates from various sources, including the Bureau of the Census (State and Local Government Finance), the Arizona Department of Revenue, the Bureau of Economic Analysis and a selection of annual financial reports for cities and counties. Sales and gross receipts taxes include the state privilege tax, local sales taxes and a variety of selective taxes, such as those on motor fuel and lodging.

[1]In effect, this means re-allocating some of the sales and excise payments made by other industries to the travel industry because the payments are ultimately made by consumers that earned their income in the travel industry.  
 [2]Businesses pay 68 percent of all property taxes in Arizona according to the Tax Foundation (Fiscal Fact No. 342, November 21, 2012).

## Travel Industry Tax Revenue

The distribution of taxes generated by the travel industry for the 2018-19 fiscal year (July 1 thru June 30) is shown in the following pie chart. The categories are the same as the preceding figure, with the exception that sales tax receipts are also distinguished between those that are generated by visitor spending and those that are generated by the spending of travel industry employees.

**Arizona Travel Industry State and Local Government Tax Revenues**  
2018-2019 Fiscal Year (\$Million)



Source: Dean Runyan Associates. "Other" travel generated tax revenue includes gaming taxes and passenger facility charges for visitors who travel to Arizona Airports. It will not add to calendar year figures in the economic impact tables.

Whereas slightly about one-half of all state and local tax revenue in Arizona was attributable to sales tax collections in the 2018-19 fiscal year, 80 percent of all travel industry tax revenue was attributable to sales tax receipts from visitors (63 percent) and the purchases of employees in the travel industry (17 percent).

Travel industry state and local tax revenues are compared to total Arizona state and local tax revenues in the following table. Because the travel industry generates a relatively high proportion of sales tax revenues, it is associated with proportionately more tax revenues than would be expected given the size of the industry, as measured by earnings or gross domestic product. Whereas the earnings and GDP of the travel industry are in the range of two and one-half percent of the state totals, travel industry tax revenues represent 6.5 percent of all state and local tax revenues in Arizona (see table, following page). This is consistent with the initial analysis that compared different industries within the state.

## Arizona State and Local Tax Revenues

2018-2019 Fiscal Year (\$Million)

(July 1 thru June 30)

Type	Total	Travel Generated	Percent Travel
Sales & Gross Receipts	\$17,972	\$1,751	9.7%
Property	\$8,540	\$203	2.4%
Income	\$5,646	\$149	2.6%
License & Other	\$1,048	\$62	5.9%
<b>Total Tax Receipts</b>	<b>\$33,205</b>	<b>\$2,165</b>	<b>6.5%</b>

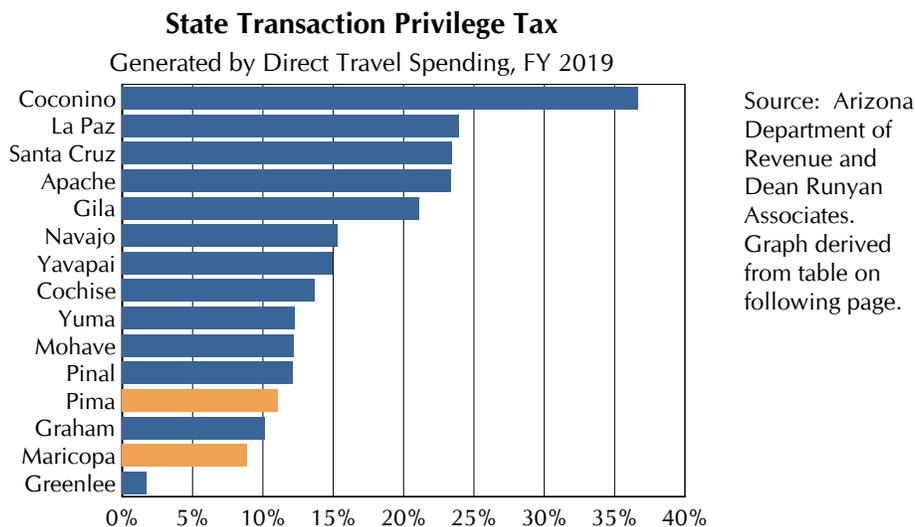
Source: Dean Runyan Associates and Bureau of the Census, State and Local Government Finance.

### Summary

This analysis of the tax revenue generated by the Arizona travel industry can be summarized as follows:

- The Arizona travel industry contributes more tax revenue to state and local governments than would be expected based on the size of the industry. Whereas the gross domestic product and employee earnings represent about three percent of the state economy, the travel industry generated 6.5 percent of tax revenue in the 2019 fiscal year (July 1 thru June 30).
- Eighty percent of all travel-generated tax revenue is attributable to sales and gross receipts taxes.
- A majority of these tax revenues are borne by visitors who reside in other states and countries.

The tax impacts of the travel industry are generally greater for the less urbanized counties in the state, as illustrated in the graph below.



The revenue contributions of Arizona's fifteen counties are detailed in the follow two tables.

**State Transaction Privilege Taxes Generated  
by Direct Travel Spending, FY 2019 (July 1 thru June 30)**  
(\$Millions)

	Total	Travel	Percent
Apache	15.2	3.5	23.4%
Cochise	78.4	10.7	13.7%
Coconino	167.9	61.5	36.6%
Gila	33.7	7.1	21.1%
Graham	22.8	2.3	10.1%
Greenlee	27.4	0.5	1.7%
La Paz	16.1	3.8	23.9%
Maricopa	4,552.1	402.9	8.9%
Mohave	162.5	19.9	12.2%
Navajo	81.1	12.4	15.3%
Pima	852.4	94.5	11.1%
Pinal	187.6	22.7	12.1%
Santa Cruz	28.6	6.7	23.4%
Yavapai	202.4	30.2	14.9%
Yuma	140.8	17.3	12.3%
<b>Arizona</b>	<b>6,568.9</b>	<b>696.2</b>	<b>10.6%</b>

**State and Local Travel-Generated Tax Revenue per Household**  
2019p Calendar Year

	Tax Revenue (\$Millions)			Households (Thousands)	Tax Revenue per Household
	Local	State	Total		
Apache	\$4.1	\$6.1	\$10.2	22.8	\$450
Cochise	\$15.0	\$15.7	\$30.8	48.6	\$630
Coconino	\$84.0	\$72.4	\$156.4	49.8	\$3,140
Gila	\$10.7	\$14.7	\$25.4	22.2	\$1,140
Graham	\$3.0	\$3.3	\$6.3	11.6	\$540
Greenlee	\$0.3	\$0.7	\$1.0	3.6	\$270
La Paz	\$6.5	\$7.4	\$13.9	9.5	\$1,460
Maricopa	\$804.4	\$623.1	\$1,427.5	1,655.0	\$860
Mohave	\$25.5	\$30.0	\$55.6	87.4	\$640
Navajo	\$15.7	\$17.7	\$33.4	36.7	\$910
Pima	\$80.6	\$139.1	\$219.7	414.5	\$530
Pinal	\$28.4	\$36.7	\$65.1	153.2	\$420
Santa Cruz	\$8.1	\$9.8	\$18.0	15.1	\$1,190
Yavapai	\$49.5	\$44.2	\$93.7	101.2	\$930
Yuma	\$24.6	\$30.1	\$54.7	70.3	\$780
<b>Arizona</b>	<b>\$1,160.5</b>	<b>\$1,051.1</b>	<b>\$2,211.6</b>	<b>2,701.6</b>	<b>\$820</b>

### III: REGIONAL TRAVEL IMPACTS 2010-2019p



*The **Northern Arizona** region includes Apache, Coconino and Navajo counties. **West Coast Arizona** includes La Paz, Mohave and Yuma counties. **North Central Arizona** includes Gila and Yavapai counties. **Phoenix and Central Arizona** includes Maricopa and Pinal counties. **Tucson and Southern Arizona** includes Cochise, Graham, Greenlee, Pima and Santa Cruz counties.*

**Arizona Regional Travel Impacts, 2019p**  
(*\$Million*)

	Travel Spending				Tax Revenue		
	Total	Visitor*	Earn	Employ.	Local	State	Total
Northern Arizona	\$2,197	\$2,093	\$606	19,290	\$104	\$96	\$200
West Coast Arizona	\$1,501	\$1,382	\$411	14,740	\$57	\$68	\$124
North Central Arizona	\$1,322	\$1,242	\$370	13,240	\$60	\$59	\$119
Phoenix & Central Arizona	\$16,719	\$13,203	\$5,320	115,670	\$833	\$660	\$1,493
Tucson & Southern Arizona	\$3,854	\$3,231	\$960	31,370	\$107	\$169	\$276
<b>Arizona</b>	<b>\$25,591</b>	<b>\$21,151</b>	<b>\$7,667</b>	<b>194,310</b>	<b>\$1,161</b>	<b>\$1,051</b>	<b>\$2,212</b>

Details may not add to totals due to rounding.

\*The sum of regional visitor spending is less than statewide visitor spending because a portion of ground transportation is allocated to "other travel" at the regional level.

**Travel Generated Employment & Earnings, 2019p**

	Employment (Thousand)			Earnings (\$Million)		
	Total	Travel	Percent Travel	Total	Travel	Percent Travel
Northern Arizona	158.4	19.3	12.2%	\$6,324	\$606	8.0%
West Coast Arizona	172.0	14.7	8.6%	\$7,411	\$411	4.6%
North Central Arizona	123.7	13.2	10.7%	\$4,410	\$370	7.0%
Phoenix & Central Arizona	2,885.9	115.7	4.0%	\$143,341	\$5,320	3.1%
Tucson & Southern Arizona	629.9	31.4	5.0%	\$28,701	\$960	2.8%
<b>Arizona</b>	<b>3,969.9</b>	<b>194.3</b>	<b>4.9%</b>	<b>\$190,186</b>	<b>\$7,667</b>	<b>3.4%</b>

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis. Total and travel generated employment estimates by Dean Runyan Associates. Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

**Arizona Regional Direct Travel Spending, 2010-2019p**  
(\$Millions)

<b>Northern Arizona</b>											
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	1,339	1,483	1,510	1,598	1,653	1,733	1,898	2,031	2,197	8.2%	5.7%
Visitor Spending	1,266	1,383	1,408	1,497	1,567	1,658	1,815	1,940	2,093	7.9%	5.7%
Non-transportation	1,102	1,180	1,209	1,294	1,397	1,504	1,637	1,745	1,878	7.6%	6.1%
Transportation	164	204	200	203	169	154	178	194	215	10.4%	3.0%
<b>West Coast Arizona</b>											
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	1,263	1,353	1,360	1,373	1,287	1,275	1,381	1,444	1,501	3.9%	1.9%
Visitor Spending	1,138	1,206	1,211	1,221	1,194	1,191	1,272	1,326	1,382	4.2%	2.2%
Non-transportation	970	1,003	1,011	1,027	1,038	1,054	1,117	1,156	1,208	4.5%	2.5%
Transportation	168	203	200	194	156	136	155	170	173	1.9%	0.3%
<b>North Central Arizona</b>											
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	877	973	996	1,024	1,026	1,042	1,143	1,246	1,322	6.1%	4.7%
Visitor Spending	813	898	920	947	975	996	1,085	1,165	1,242	6.6%	4.8%
Non-transportation	715	772	797	826	877	911	988	1,056	1,129	6.8%	5.2%
Transportation	98	126	123	121	98	85	97	109	113	3.9%	1.7%
<b>Phoenix &amp; Central Arizona</b>											
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	11,089	12,219	12,638	13,264	13,636	13,891	14,711	16,067	16,719	4.1%	4.7%
Visitor Spending	8,614	9,290	9,582	10,140	10,639	10,954	11,580	12,637	13,203	4.5%	4.9%
Non-transportation	6,189	6,641	6,858	7,269	7,783	8,129	8,574	9,337	9,748	4.4%	5.2%
Transportation	2,425	2,649	2,724	2,870	2,856	2,825	3,006	3,300	3,456	4.7%	4.0%
<b>Tucson &amp; Southern Arizona</b>											
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	3,207	3,461	3,432	3,503	3,432	3,305	3,545	3,658	3,854	5.4%	2.1%
Visitor Spending	2,671	2,771	2,805	2,874	2,861	2,756	2,957	3,060	3,231	5.6%	2.1%
Non-transportation	2,112	2,161	2,206	2,266	2,299	2,232	2,386	2,449	2,595	6.0%	2.3%
Transportation	559	609	598	608	562	524	571	611	637	4.2%	1.5%

Details may not add to totals due to rounding.

### Arizona Regional Travel-Generated Earnings, 2010-2019p

(\$Millions)

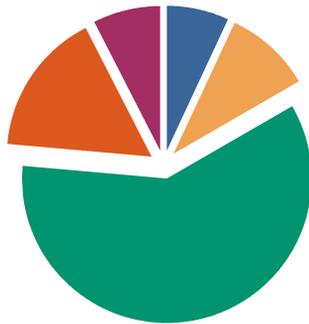
	2010	2012	2013	2014	2015	2016	2017	2018	2019	18-19p	10-19p
Northern Arizona	375	401	414	443	471	500	553	585	606	3.5%	5.5%
West Coast Arizona	297	301	306	323	334	354	385	406	411	1.3%	3.7%
North Central Arizona	220	231	242	259	276	294	320	351	370	5.3%	5.9%
Phoenix & Central Arizona	3,398	3,716	3,854	4,020	4,309	4,478	4,816	5,148	5,320	3.4%	5.1%
Tucson & Southern Arizona	679	744	730	781	826	838	894	907	960	5.9%	3.9%
<b>Arizona</b>	<b>4,969</b>	<b>5,393</b>	<b>5,546</b>	<b>5,827</b>	<b>6,216</b>	<b>6,464</b>	<b>6,968</b>	<b>7,397</b>	<b>7,667</b>	<b>3.7%</b>	<b>4.9%</b>

### Arizona Regional Travel-Generated Employment, 2010-2019p

(Thousands)

	2010	2012	2013	2014	2015	2016	2017	2018	2019	18-19p	10-19p
Northern Arizona	16.0	16.2	16.6	17.2	17.6	18.3	19.0	19.4	19.3	-0.4%	2.1%
West Coast Arizona	13.2	13.2	13.1	13.5	14.0	14.4	14.5	14.7	14.7	0.2%	1.3%
North Central Arizona	10.1	10.4	10.5	11.2	11.5	12.0	12.4	12.8	13.2	3.5%	3.0%
Phoenix & Central Arizona	88.1	93.0	95.8	100.2	105.2	108.1	110.6	114.4	115.7	1.1%	3.1%
Tucson & Southern Arizona	28.5	29.7	29.5	30.6	31.1	31.3	31.4	31.1	31.4	0.9%	1.1%
<b>Arizona</b>	<b>155.9</b>	<b>162.5</b>	<b>165.6</b>	<b>172.7</b>	<b>179.5</b>	<b>184.2</b>	<b>187.9</b>	<b>192.3</b>	<b>194.3</b>	<b>1.0%</b>	<b>2.5%</b>

Travel-Generated Employment, 2019p



■ North Central Arizona	6.8%
■ Northern Arizona	9.9%
■ Phoenix & Central Arizona	59.5%
■ Tucson & Southern Arizona	16.1%
■ West Coast Arizona	7.6%
Total:	100.0%

Travel-Generated Earnings, 2019p



■ North Central Arizona	4.8%
■ Northern Arizona	7.9%
■ Phoenix & Central Arizona	69.4%
■ Tucson & Southern Arizona	12.5%
■ West Coast Arizona	5.4%
Total:	100.0%

**Northern Arizona Travel Impacts**  
2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	1,266	1,383	1,408	1,497	1,567	1,658	1,815	1,940	2,093
Other Travel*	73	99	102	101	87	75	84	91	104
<b>Total</b>	<b>1,339</b>	<b>1,483</b>	<b>1,510</b>	<b>1,598</b>	<b>1,653</b>	<b>1,733</b>	<b>1,898</b>	<b>2,031</b>	<b>2,197</b>

<b>Visitor Spending by Type of Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	764	840	863	934	1,007	1,088	1,214	1,308	1,421
Private Home	145	161	159	163	158	157	163	164	176
Campground	48	50	50	49	47	47	49	51	55
Vacation Home	89	94	95	97	97	99	100	103	106
Day Travel	220	238	242	253	258	267	290	313	335
<b>Total</b>	<b>1,266</b>	<b>1,383</b>	<b>1,408</b>	<b>1,497</b>	<b>1,567</b>	<b>1,658</b>	<b>1,815</b>	<b>1,940</b>	<b>2,093</b>

<b>Visitor Spending by Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	344	381	398	439	494	546	604	638	680
Food Service	309	331	340	364	390	422	463	505	555
Food Stores	76	83	83	88	93	95	99	103	110
Local Tran. & Gas	150	190	186	187	153	138	159	183	192
Arts, Ent. & Rec.	176	181	184	193	202	215	230	247	263
Retail Sales	198	205	204	211	218	227	241	253	271
Visitor Air Tran.	13	14	13	15	17	16	19	12	23
<b>Total</b>	<b>1,266</b>	<b>1,383</b>	<b>1,408</b>	<b>1,497</b>	<b>1,567</b>	<b>1,658</b>	<b>1,815</b>	<b>1,940</b>	<b>2,093</b>

<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	231	244	254	268	284	301	332	359	373
Arts, Ent. & Rec.	91	100	102	112	118	126	138	141	144
Retail**	39	40	40	43	46	50	51	53	53
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	6	6	5	7	8	9	15	13	14
Other Travel*	7	11	13	14	14	14	17	20	22
<b>Total</b>	<b>375</b>	<b>401</b>	<b>414</b>	<b>443</b>	<b>471</b>	<b>500</b>	<b>553</b>	<b>585</b>	<b>606</b>

<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	9,860	10,010	10,190	10,420	10,600	11,030	11,290	11,820	11,870
Arts, Ent. & Rec.	4,250	4,130	4,310	4,570	4,640	4,930	5,310	5,060	4,860
Retail**	1,560	1,580	1,560	1,620	1,700	1,800	1,760	1,780	1,750
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	110	100	100	120	150	180	220	190	210
Other Travel*	230	370	420	460	490	400	430	510	590
<b>Total</b>	<b>16,000</b>	<b>16,190</b>	<b>16,580</b>	<b>17,200</b>	<b>17,590</b>	<b>18,340</b>	<b>19,010</b>	<b>19,360</b>	<b>19,290</b>

<b>Government Revenue Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	60	64	64	70	77	84	90	98	104
State Tax Receipts	61	69	66	67	72	76	84	91	96
<b>Total</b>	<b>122</b>	<b>134</b>	<b>131</b>	<b>138</b>	<b>149</b>	<b>160</b>	<b>174</b>	<b>189</b>	<b>200</b>

\*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

\*\*Retail includes gasoline. Details may not add to totals due to rounding.

\*\*\*STVR stands for Short Term Vacation Rental

Northern Arizona includes Apache, Coconino and Navajo counties.

**West Coast Arizona Travel Impacts**  
2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	1,138	1,206	1,211	1,221	1,194	1,191	1,272	1,326	1,382
Other Travel*	126	147	148	152	93	84	110	118	119
<b>Total</b>	<b>1,263</b>	<b>1,353</b>	<b>1,360</b>	<b>1,373</b>	<b>1,287</b>	<b>1,275</b>	<b>1,381</b>	<b>1,444</b>	<b>1,501</b>

<b>Visitor Spending by Type of Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	253	277	267	279	293	306	341	373	406
Private Home	250	265	277	272	259	256	281	286	291
Campground	126	128	122	120	117	116	119	125	134
Vacation Home	99	106	106	108	108	110	113	117	121
Day Travel	410	429	440	441	416	402	418	425	430
<b>Total</b>	<b>1,138</b>	<b>1,206</b>	<b>1,211</b>	<b>1,221</b>	<b>1,194</b>	<b>1,191</b>	<b>1,272</b>	<b>1,326</b>	<b>1,382</b>

<b>Visitor Spending by Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	124	132	128	137	148	157	173	185	202
Food Service	259	271	279	284	292	304	330	347	368
Food Stores	124	131	135	138	135	130	133	133	135
Local Tran. & Gas	156	191	188	180	141	122	140	154	157
Arts, Ent. & Rec.	251	255	250	250	254	261	274	283	293
Retail Sales	211	214	219	218	209	203	208	209	210
Visitor Air Tran.	12	12	12	14	15	14	15	16	17
<b>Total</b>	<b>1,138</b>	<b>1,206</b>	<b>1,211</b>	<b>1,221</b>	<b>1,194</b>	<b>1,191</b>	<b>1,272</b>	<b>1,326</b>	<b>1,382</b>

<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	136	137	144	150	172	187	205	217	222
Arts, Ent. & Rec.	95	98	95	103	105	108	113	119	119
Retail**	50	49	50	52	52	52	54	56	58
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	1	0	0	0	0	1	1	1	1
Other Travel*	15	16	17	19	5	7	13	12	12
<b>Total</b>	<b>297</b>	<b>301</b>	<b>306</b>	<b>323</b>	<b>334</b>	<b>354</b>	<b>385</b>	<b>406</b>	<b>411</b>

<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	6,630	6,440	6,660	6,810	7,540	7,950	8,070	8,210	8,010
Arts, Ent. & Rec.	4,230	4,550	4,250	4,440	4,600	4,550	4,420	4,500	4,720
Retail**	1,770	1,700	1,700	1,720	1,690	1,680	1,650	1,660	1,670
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	10	10	10	10	20	20	20
Other Travel*	530	520	530	550	190	240	350	330	320
<b>Total</b>	<b>13,170</b>	<b>13,210</b>	<b>13,140</b>	<b>13,520</b>	<b>14,040</b>	<b>14,440</b>	<b>14,510</b>	<b>14,710</b>	<b>14,740</b>

<b>Government Revenue Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	42	43	43	43	45	47	51	55	57
State Tax Receipts	56	60	58	56	57	57	62	65	68
<b>Total</b>	<b>98</b>	<b>102</b>	<b>100</b>	<b>99</b>	<b>102</b>	<b>104</b>	<b>113</b>	<b>120</b>	<b>124</b>

\*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

\*\*Retail includes gasoline. Details may not add to totals due to rounding.

\*\*\*STVR stands for Short Term Vacation Rental

West Coast Arizona includes La Paz, Mohave and Yuma counties.

**North Central Arizona Travel Impacts**  
2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	813	898	920	947	975	996	1,085	1,165	1,242
Other Travel*	64	75	77	78	51	46	58	81	80
<b>Total</b>	<b>877</b>	<b>973</b>	<b>996</b>	<b>1,024</b>	<b>1,026</b>	<b>1,042</b>	<b>1,143</b>	<b>1,246</b>	<b>1,322</b>

<b>Visitor Spending by Type of Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	250	293	312	332	365	387	449	505	560
Private Home	118	130	130	131	128	126	134	139	144
Campground	25	27	27	28	27	27	28	30	32
Vacation Home	37	39	40	41	41	42	43	45	46
Day Travel	383	408	411	415	413	413	430	447	460
<b>Total</b>	<b>813</b>	<b>898</b>	<b>920</b>	<b>947</b>	<b>975</b>	<b>996</b>	<b>1,085</b>	<b>1,165</b>	<b>1,242</b>

<b>Visitor Spending by Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	121	141	153	167	192	211	245	276	306
Food Service	161	176	183	190	202	211	231	249	268
Food Stores	61	66	67	70	72	72	74	76	79
Local Tran. & Gas	97	124	122	120	97	84	96	108	111
Arts, Ent. & Rec.	261	273	277	280	289	295	311	323	339
Retail Sales	111	116	117	118	121	122	127	132	136
Visitor Air Tran.	1	2	1	1	1	1	1	1	2
<b>Total</b>	<b>813</b>	<b>898</b>	<b>920</b>	<b>947</b>	<b>975</b>	<b>996</b>	<b>1,085</b>	<b>1,165</b>	<b>1,242</b>

<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	96	110	120	129	146	159	174	192	205
Arts, Ent. & Rec.	93	89	89	95	98	101	108	114	120
Retail**	24	25	25	26	28	29	31	32	33
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	1	1	1	1
Other Travel*	7	6	7	8	3	3	6	12	11
<b>Total</b>	<b>220</b>	<b>231</b>	<b>242</b>	<b>259</b>	<b>276</b>	<b>294</b>	<b>320</b>	<b>351</b>	<b>370</b>

<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	4,160	4,600	4,830	5,100	5,490	5,870	6,030	6,340	6,450
Arts, Ent. & Rec.	4,750	4,590	4,510	4,830	4,840	4,870	5,110	5,100	5,460
Retail**	980	980	990	1,020	1,070	1,080	1,090	1,110	1,110
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	10	10	10	10	10	10	10
Other Travel*	260	220	220	230	120	130	170	240	220
<b>Total</b>	<b>10,150</b>	<b>10,390</b>	<b>10,550</b>	<b>11,190</b>	<b>11,530</b>	<b>11,960</b>	<b>12,410</b>	<b>12,790</b>	<b>13,240</b>

<b>Government Revenue Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	32	34	36	38	41	44	50	56	60
State Tax Receipts	39	44	43	43	45	47	51	56	59
<b>Total</b>	<b>71</b>	<b>78</b>	<b>79</b>	<b>81</b>	<b>87</b>	<b>91</b>	<b>101</b>	<b>112</b>	<b>119</b>

\*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

\*\*Retail includes gasoline. Details may not add to totals due to rounding.

\*\*\*STVR stands for Short Term Vacation Rental

North Central Arizona includes Gila and Yavapai counties.

**Phoenix & Central Arizona Travel Impacts**  
2010-2019p

**Total Direct Travel Spending (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	8,614	9,290	9,582	10,140	10,639	10,954	11,580	12,637	13,203
Other Travel*	2,475	2,928	3,055	3,125	2,997	2,937	3,131	3,431	3,515
<b>Total</b>	<b>11,089</b>	<b>12,219</b>	<b>12,638</b>	<b>13,264</b>	<b>13,636</b>	<b>13,891</b>	<b>14,711</b>	<b>16,067</b>	<b>16,719</b>

**Visitor Spending by Type of Accommodation (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	4,304	4,695	4,872	5,212	5,613	5,842	6,219	6,896	7,258
Private Home	2,492	2,624	2,696	2,828	2,918	2,970	3,112	3,325	3,445
Campground	278	297	304	321	314	315	327	347	373
Vacation Home	332	357	365	378	386	397	411	430	447
Day Travel	1,208	1,318	1,346	1,401	1,408	1,430	1,512	1,639	1,680
<b>Total</b>	<b>8,614</b>	<b>9,290</b>	<b>9,582</b>	<b>10,140</b>	<b>10,639</b>	<b>10,954</b>	<b>11,580</b>	<b>12,637</b>	<b>13,203</b>

**Visitor Spending by Commodity Purchased (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	1,412	1,568	1,642	1,794	2,025	2,115	2,265	2,519	2,759
Food Service	1,995	2,156	2,243	2,385	2,547	2,706	2,889	3,175	3,302
Food Stores	318	343	352	375	394	399	408	430	441
Local Tran. & Gas	1,114	1,297	1,313	1,350	1,238	1,202	1,295	1,447	1,456
Arts, Ent. & Rec.	1,157	1,205	1,229	1,280	1,332	1,387	1,443	1,545	1,564
Retail Sales	1,307	1,368	1,391	1,435	1,485	1,522	1,569	1,667	1,682
Visitor Air Tran.	1,311	1,353	1,411	1,520	1,618	1,623	1,711	1,853	1,999
<b>Total</b>	<b>8,614</b>	<b>9,290</b>	<b>9,582</b>	<b>10,140</b>	<b>10,639</b>	<b>10,954</b>	<b>11,580</b>	<b>12,637</b>	<b>13,203</b>

**Industry Earnings Generated by Travel Spending (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	1,226	1,328	1,396	1,473	1,572	1,648	1,778	1,924	1,999
Arts, Ent. & Rec.	539	587	616	670	701	738	780	856	918
Retail**	217	227	228	246	265	281	291	309	315
Ground Tran.	109	119	120	129	139	149	170	183	197
Visitor Air Tran.	564	602	602	610	684	693	764	789	814
Other Travel*	743	854	893	892	947	971	1,034	1,087	1,077
<b>Total</b>	<b>3,398</b>	<b>3,716</b>	<b>3,854</b>	<b>4,020</b>	<b>4,309</b>	<b>4,478</b>	<b>4,816</b>	<b>5,148</b>	<b>5,320</b>

**Industry Employment Generated by Travel Spending (Jobs)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	43,070	45,030	47,160	48,480	50,120	51,860	53,170	55,020	55,330
Arts, Ent. & Rec.	16,830	17,870	18,780	20,010	21,350	21,490	22,140	23,730	24,500
Retail**	6,660	6,670	6,830	7,190	7,620	7,940	8,010	8,130	8,020
Ground Tran.	2,780	2,970	3,040	3,160	3,320	3,600	4,030	4,130	4,340
Visitor Air Tran.	6,770	7,160	7,000	7,300	7,720	7,820	8,010	8,360	8,440
Other Travel*	11,990	13,290	13,010	14,100	15,070	15,400	15,240	15,000	15,040
<b>Total</b>	<b>88,100</b>	<b>92,990</b>	<b>95,820</b>	<b>100,240</b>	<b>105,190</b>	<b>108,110</b>	<b>110,600</b>	<b>114,370</b>	<b>115,670</b>

**Government Revenue Generated by Travel Spending (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	467	495	514	536	586	613	665	800	833
State Tax Receipts	445	503	495	491	522	538	582	638	660
<b>Total</b>	<b>912</b>	<b>998</b>	<b>1,010</b>	<b>1,026</b>	<b>1,108</b>	<b>1,151</b>	<b>1,247</b>	<b>1,438</b>	<b>1,493</b>

\*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

\*\*Retail includes gasoline. Details may not add to totals due to rounding.

\*\*\*STVR stands for Short Term Vacation Rental

Phoenix & Central Arizona includes Maricopa and Pinal counties.

**Tucson & Southern Arizona Travel Impacts**  
2010-2019p

**Total Direct Travel Spending (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	2,671	2,771	2,805	2,874	2,861	2,756	2,957	3,060	3,231
Other Travel*	536	690	627	629	571	549	588	598	622
<b>Total</b>	<b>3,207</b>	<b>3,461</b>	<b>3,432</b>	<b>3,503</b>	<b>3,432</b>	<b>3,305</b>	<b>3,545</b>	<b>3,658</b>	<b>3,854</b>

**Visitor Spending by Type of Accommodation (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	1,097	1,118	1,131	1,169	1,227	1,197	1,292	1,360	1,452
Private Home	575	600	592	604	599	589	623	650	677
Campground	42	46	45	45	43	42	44	46	49
Vacation Home	56	60	60	61	61	62	63	66	67
Day Travel	901	947	976	995	931	866	935	938	986
<b>Total</b>	<b>2,671</b>	<b>2,771</b>	<b>2,805</b>	<b>2,874</b>	<b>2,861</b>	<b>2,756</b>	<b>2,957</b>	<b>3,060</b>	<b>3,231</b>

**Visitor Spending by Commodity Purchased (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	391	394	398	414	443	440	473	508	561
Food Service	652	682	699	724	760	756	817	851	899
Food Stores	274	289	302	313	299	275	286	279	291
Local Tran. & Gas	355	411	408	406	358	319	352	375	383
Arts, Ent. & Rec.	211	212	211	214	220	217	227	232	238
Retail Sales	584	585	597	600	578	544	582	579	607
Visitor Air Tran.	204	198	190	202	204	205	219	236	254
<b>Total</b>	<b>2,671</b>	<b>2,771</b>	<b>2,805</b>	<b>2,874</b>	<b>2,861</b>	<b>2,756</b>	<b>2,957</b>	<b>3,060</b>	<b>3,231</b>

**Industry Earnings Generated by Travel Spending (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	375	411	416	444	481	491	530	536	574
Arts, Ent. & Rec.	94	93	93	104	107	107	114	127	130
Retail**	117	116	117	123	123	119	123	123	127
Ground Tran.	27	29	29	31	33	33	38	42	46
Visitor Air Tran.	11	9	8	10	11	12	12	12	12
Other Travel*	55	86	67	70	71	76	77	67	71
<b>Total</b>	<b>679</b>	<b>744</b>	<b>730</b>	<b>781</b>	<b>826</b>	<b>838</b>	<b>894</b>	<b>907</b>	<b>960</b>

**Industry Employment Generated by Travel Spending (Jobs)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	16,380	17,180	17,280	17,860	18,400	18,420	18,400	17,940	18,320
Arts, Ent. & Rec.	5,520	5,410	5,450	5,820	5,900	6,060	6,150	6,620	6,530
Retail**	4,140	4,000	4,020	4,120	4,050	3,870	3,840	3,740	3,750
Ground Tran.	700	740	740	750	800	800	900	950	1,010
Visitor Air Tran.	210	180	130	170	170	180	160	170	170
Other Travel*	1,560	2,210	1,920	1,850	1,830	1,980	1,950	1,670	1,590
<b>Total</b>	<b>28,500</b>	<b>29,710</b>	<b>29,540</b>	<b>30,580</b>	<b>31,140</b>	<b>31,310</b>	<b>31,400</b>	<b>31,080</b>	<b>31,370</b>

**Government Revenue Generated by Travel Spending (\$Million)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	98	99	99	100	106	105	97	101	107
State Tax Receipts	136	149	143	140	144	141	154	160	169
<b>Total</b>	<b>234</b>	<b>249</b>	<b>241</b>	<b>240</b>	<b>249</b>	<b>246</b>	<b>250</b>	<b>262</b>	<b>276</b>

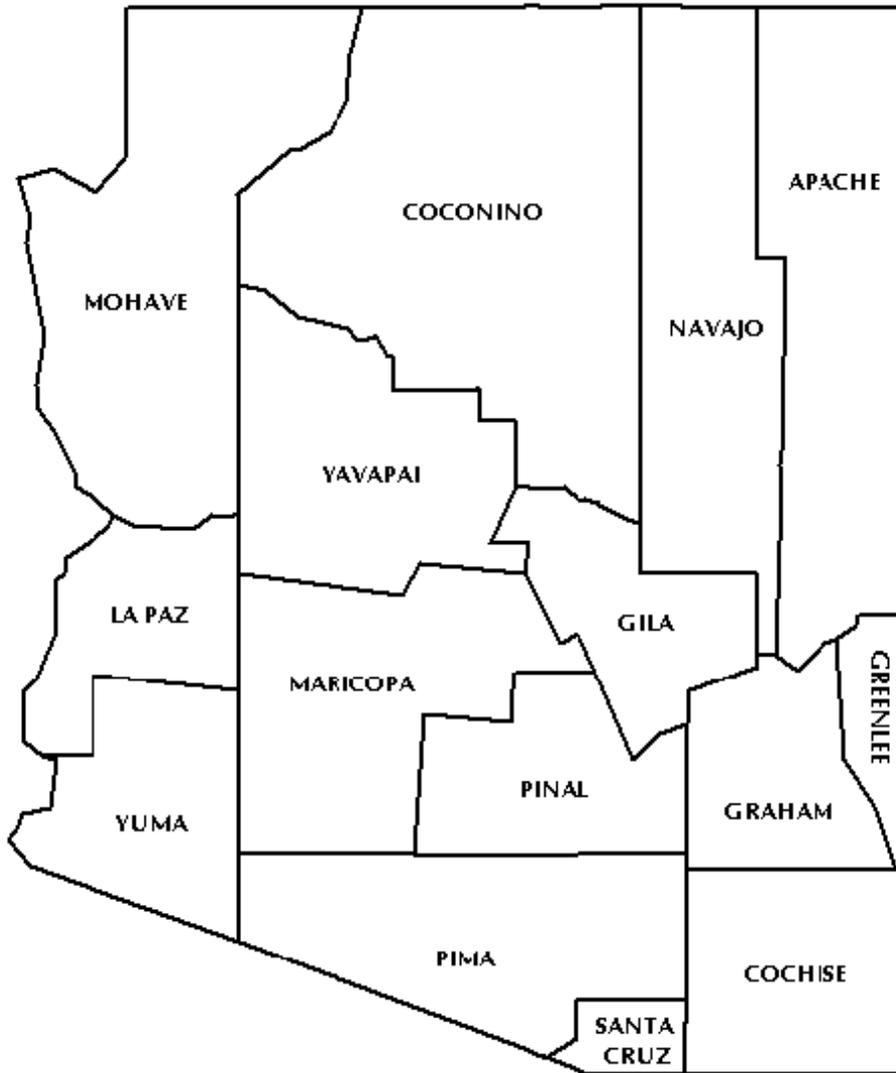
\*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

\*\*Retail includes gasoline. Details may not add to totals due to rounding.

\*\*\*STVR stands for Short Term Vacation Rental

Tucson & Southern Arizona includes Cochise, Graham, Greenlee, Pima and Santa Cruz counties.

**IV. COUNTY TRAVEL IMPACTS**  
2010-2019p



The analysis of travel impacts at the county level provides a valuable overview of how the economic benefits of travel and tourism are distributed throughout the state.

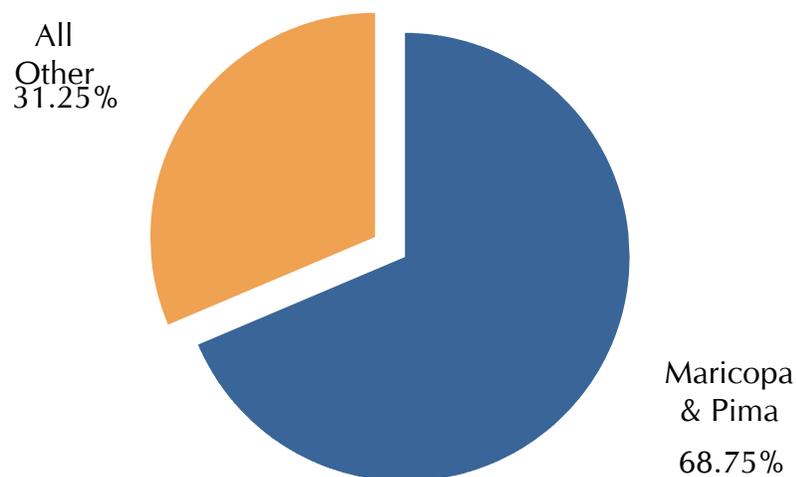
Urban areas, such as Maricopa County, tend to have highly developed travel industry infrastructure consisting of large inventories of amusement and recreation opportunities, commercial accommodations, and well-developed transportation links. Hotel/motel guests are important to these areas and, hence, a large proportion of travel expenditures are spent on overnight lodging.

In many of the less urbanized areas of Arizona, however, the economic significance of travel and tourism is actually relatively more important. The infrastructure that serves visitors to Maricopa County also serves local residents. Most of the spending on recreation and food services in Maricopa County is by local residents. This is not the case in most other less urbanized areas of the state -leisure and hospitality businesses are generally much more dependent on visitor spending rather than local residents.

In the graph below, the two most populous counties in Arizona, Maricopa and Pima, are compared with the thirteen other counties in the state with respect to their share of total employment -two-thirds of all travel-generated jobs in the state are in the two most populous counties.

### Distribution of Travel-Generated Employment, 2019p

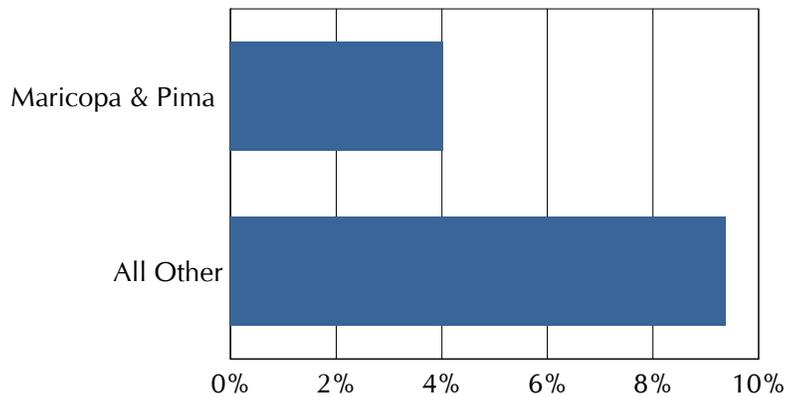
Percent of State Direct Travel



Source: Dean Runyan Associates, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. Total and travel-generated employments estimates by Dean Runyan Associates.

However, as a group the less urbanized counties in the state actually have a higher proportion of travel-generated employment in relation to the total employment of the county. This is shown graphically below. Four percent of all employment in Maricopa and Pima counties is travel-generated. By contrast, the proportion is more than double for the other Arizona counties.

**Percent of Total Area Employment That is Travel-Generated, 2019p**



Source: Dean Runyan Associates, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. Total and travel-generated employment estimates by Dean Runyan Associates. Travel-generated employment in Maricopa and Pima counties constitutes 4 percent of all employment in those counties. The comparable figure for other Arizona counties is slightly over 9 percent.

In general, the employment and earnings estimates provided in the preceding figures are probably the best measure at the county level of the relative importance of travel and tourism for local economies. The following table provides estimates for individual counties. Total employment includes all full-time and part-time wage and salary employment and self-employment. Because total employment includes all *jobs*, regardless of the hours worked, the average annual earnings of the job or the number of individuals employed, this indicator is in some respects less useful than earnings estimates. Nonetheless, the distribution of counties is similar for earnings and employment.

## Travel-Generated Employment and Earnings as Percent of Total, 2019p

	Employment			Earnings (\$Millions)		
	Total	Travel	Percent Travel	Total	Travel	Percent Travel
Apache	28,320	1,540	5.4%	\$1,299	\$39	3.0%
Cochise	51,660	3,510	6.8%	\$2,882	\$89	3.1%
Coconino	88,590	13,810	15.6%	\$4,485	\$458	10.2%
Gila	20,960	2,950	14.1%	\$971	\$85	8.8%
Graham	13,040	910	7.0%	\$638	\$15	2.3%
Greenlee	5,930	110	1.8%	\$484	\$3	0.5%
La Paz	8,210	1,410	17.2%	\$357	\$43	12.2%
Maricopa	2,783,810	108,810	3.9%	\$167,023	\$5,120	3.1%
Mohave	72,200	6,400	8.9%	\$3,111	\$180	5.8%
Navajo	41,500	3,940	9.5%	\$1,786	\$109	6.1%
Pima	538,360	24,770	4.6%	\$29,176	\$796	2.7%
Pinal	102,040	6,860	6.7%	\$4,542	\$200	4.4%
Santa Cruz	20,950	2,070	9.9%	\$1,172	\$58	4.9%
Yavapai	102,740	10,300	10.0%	\$4,306	\$284	6.6%
Yuma	91,560	6,930	7.6%	\$5,401	\$188	3.5%

Source: Dean Runyan Associates, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. Total and travel-generated employment estimates by Dean Runyan Associates.

Note: Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

Direct travel impact estimates can be found on the following pages. As noted in the appendix to this report, county level estimates are necessarily less reliable than the statewide estimates. Furthermore, estimates for the smallest counties are less reliable than those for larger counties due to survey sample sizes and other data limitations. For this reason, small changes in year-to-year estimates are less important than longer-term trends.

## 2019p Arizona County Travel Impacts

### Related Travel-Generated Impacts

	Travel Spending		Earnings (\$Million)	Employment (jobs)	Taxes		
	Total (\$Million)	Visitor (\$Million)			Local (\$Million)	State (\$Million)	Total (\$Million)
Apache	124	110	39	1,540	4.1	6.1	10.2
Cochise	345	320	89	3,510	15.0	15.7	30.8
Coconino	1,697	1,628	458	13,810	84.0	72.4	156.4
Gila	321	311	85	2,950	10.7	14.7	25.4
Graham	70	63	15	910	3.0	3.3	6.3
Greenlee	15	13	3	110	0.3	0.7	1.0
La Paz	167	163	43	1,410	6.5	7.4	13.9
Maricopa	15,945	12,518	5,120	108,810	804.4	623.1	1,427.5
Mohave	667	608	180	6,400	25.5	30.0	55.6
Navajo	376	355	109	3,940	15.7	17.7	33.4
Pima	3,189	2,610	796	24,770	80.6	139.1	219.7
Pinal	774	686	200	6,860	28.4	36.7	65.1
Santa Cruz	235	226	58	2,070	8.1	9.8	18.0
Yavapai	1,000	931	284	10,300	49.5	44.2	93.7
Yuma	667	611	188	6,930	24.6	30.1	54.7
<b>Arizona</b>	<b>25,591</b>	<b>21,151</b>	<b>7,667</b>	<b>194,310</b>	<b>1,161</b>	<b>1,051</b>	<b>2,212</b>

Details may not add to totals due to rounding.

The sum of county visitor spending is less than statewide visitor spending because a portion of county ground transportation is allocated to "other travel" at the county level.

**Arizona County Travel-Generated Earnings, 2010-2019p**  
**(\$Millions)**

	2010	2012	2013	2014	2015	2016	2017	2018	2019	Annual Percent Chg.	
										18-19p	10-19p
Apache	31	32	29	31	33	36	37	38	39	1.3%	2.4%
Cochise	81	77	77	79	81	79	82	84	89	6.0%	1.2%
Coconino	267	284	299	323	343	365	409	434	458	5.5%	6.2%
Gila	56	58	61	65	69	73	78	82	85	4.2%	4.8%
Graham	11	13	14	15	12	12	13	14	15	6.2%	3.8%
Greenlee	2	2	3	3	3	2	2	2	3	9.5%	2.0%
La Paz	29	31	33	33	34	34	36	41	43	6.7%	4.8%
Maricopa	3,273	3,582	3,723	3,884	4,162	4,310	4,635	4,961	5,120	3.2%	5.1%
Mohave	125	124	134	145	151	165	185	196	180	-8.1%	4.1%
Navajo	77	85	86	89	94	98	106	113	109	-3.6%	4.0%
Pima	537	605	587	631	674	693	743	752	796	5.8%	4.5%
Pinal	125	134	131	137	147	168	181	187	200	7.1%	5.4%
Santa Cruz	49	47	49	53	57	53	54	54	58	6.5%	1.8%
Yavapai	164	173	181	194	207	221	242	269	284	5.6%	6.3%
Yuma	143	146	139	145	150	155	165	169	188	10.8%	3.1%

Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

## Arizona County Travel-Generated Employment, 2010-2019p

	2010	2012	2013	2014	2015	2016	2017	2018	2019	Annual Percent Chg.	
										18-19p	10-19p
Apache	1,660	1,590	1,480	1,540	1,610	1,700	1,600	1,590	1,540	-3.1%	-0.9%
Cochise	4,070	3,750	3,710	3,750	3,760	3,580	3,430	3,420	3,510	2.8%	-1.6%
Coconino	10,820	10,960	11,420	11,890	12,030	12,640	13,340	13,640	13,810	1.2%	2.7%
Gila	2,670	2,660	2,640	2,690	2,740	2,920	2,900	2,880	2,950	2.2%	1.1%
Graham	880	950	1,050	1,050	840	810	880	910	910	-0.3%	0.4%
Greenlee	130	140	150	160	140	110	110	110	110	1.2%	-1.8%
La Paz	1,200	1,310	1,380	1,380	1,330	1,350	1,300	1,410	1,410	0.0%	1.8%
Maricopa	83,060	87,480	90,160	94,530	99,180	101,270	103,800	107,660	108,810	1.1%	3.0%
Mohave	5,900	5,560	5,750	6,100	6,450	6,710	6,960	7,090	6,400	-9.8%	0.9%
Navajo	3,520	3,650	3,690	3,760	3,940	4,000	4,070	4,130	3,940	-4.7%	1.3%
Pima	21,440	22,950	22,600	23,440	24,050	24,700	24,970	24,670	24,770	0.4%	1.6%
Pinal	5,050	5,500	5,660	5,710	6,010	6,840	6,810	6,710	6,860	2.3%	3.5%
Santa Cruz	2,000	1,920	2,020	2,180	2,360	2,110	2,010	1,980	2,070	4.6%	0.4%
Yavapai	7,480	7,730	7,910	8,500	8,790	9,040	9,510	9,910	10,300	3.9%	3.6%
Yuma	6,070	6,340	6,010	6,050	6,260	6,370	6,250	6,210	6,930	11.6%	1.5%

Details may not add to totals due to rounding. Percentages calculated on unrounded numbers.

**Arizona County Direct Travel Spending, 2010-2019p**  
(\$Millions)

	2010	2012	2013	2014	2015	2016	2017	2018	2019	18-19p	10-19p
<b>Apache</b>											
Total Spending	122	129	117	119	115	116	118	119	124	4.1%	0.1%
Visitor Spending	108	111	100	103	102	105	106	105	110	4.6%	0.2%
Non-transportation	92	91	81	84	88	92	92	90	95	4.9%	0.4%
Transportation	17	20	19	19	15	13	14	15	15	2.6%	-0.9%
<b>Cochise</b>											
Total Spending	370	350	343	338	325	307	327	331	345	4.5%	-0.8%
Visitor Spending	343	317	311	307	302	287	304	305	320	5.0%	-0.7%
Non-transportation	295	264	260	258	264	255	268	266	281	5.4%	-0.6%
Transportation	47	53	51	48	39	32	36	39	39	1.8%	-2.0%
<b>Coconino</b>											
Total Spending	942	1,050	1,088	1,172	1,236	1,311	1,450	1,569	1,697	8.1%	6.8%
Visitor Spending	904	994	1,027	1,111	1,182	1,264	1,397	1,513	1,628	7.6%	6.8%
Non-transportation	790	853	888	967	1,059	1,152	1,265	1,369	1,466	7.1%	7.1%
Transportation	113	141	139	144	123	113	132	144	162	12.3%	4.0%
<b>Gila</b>											
Total Spending	257	279	282	278	278	279	294	297	321	8.3%	2.5%
Visitor Spending	246	266	269	266	268	270	285	286	311	8.6%	2.6%
Non-transportation	216	228	232	230	240	246	257	256	280	9.1%	2.9%
Transportation	30	38	37	35	28	25	27	30	31	4.3%	0.2%
<b>Graham</b>											
Total Spending	51	62	73	76	57	55	63	64	70	10.2%	3.6%
Visitor Spending	44	53	64	67	50	49	56	56	63	11.4%	4.1%
Non-transportation	36	43	53	56	43	43	49	48	54	12.2%	4.7%
Transportation	8	10	11	11	7	6	7	8	8	6.3%	0.8%
<b>Greenlee</b>											
Total Spending	11	13	15	16	12	12	13	14	15	8.3%	3.8%
Visitor Spending	9	11	13	14	11	11	12	12	13	9.5%	4.2%
Non-transportation	7	9	11	11	9	9	10	10	11	10.4%	4.8%
Transportation	2	2	2	2	2	1	2	2	2	4.5%	1.4%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

**Arizona County Direct Travel Spending, 2010-2019p**  
(\$Millions)

<b>La Paz</b>	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	128	142	144	141	140	139	146	164	167	1.9%	3.0%
Visitor Spending	124	138	139	136	136	136	142	160	163	1.9%	3.1%
Non-transportation	107	116	118	116	120	122	127	141	145	2.2%	3.4%
Transportation	17	22	22	20	16	14	16	18	18	-0.1%	0.7%
<b>Maricopa</b>	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	10,507	11,594	12,017	12,620	12,995	13,255	14,020	15,316	15,945	4.1%	4.7%
Visitor Spending	8,106	8,756	9,051	9,585	10,071	10,383	10,963	11,971	12,518	4.6%	4.9%
Non-transportation	5,756	6,198	6,416	6,804	7,288	7,621	8,029	8,753	9,145	4.5%	5.3%
Transportation	2,350	2,557	2,635	2,781	2,783	2,762	2,934	3,217	3,373	4.8%	4.1%
<b>Mohave</b>	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	530	554	580	581	524	529	600	630	667	5.9%	2.6%
Visitor Spending	461	474	497	494	484	490	541	569	608	6.8%	3.1%
Non-transportation	385	384	405	408	416	431	472	493	530	7.5%	3.6%
Transportation	76	90	92	87	68	59	69	76	78	2.5%	0.4%
<b>Navajo</b>	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	275	304	306	307	302	305	331	343	376	9.7%	3.5%
Visitor Spending	254	278	281	283	283	289	312	322	355	10.4%	3.8%
Non-transportation	221	236	239	243	250	260	280	286	318	10.9%	4.1%
Transportation	34	43	42	40	32	28	32	35	37	5.8%	1.1%
<b>Pima</b>	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	2,513	2,764	2,713	2,784	2,772	2,697	2,902	3,021	3,189	5.5%	2.7%
Visitor Spending	2,022	2,129	2,140	2,208	2,240	2,183	2,353	2,467	2,610	5.8%	2.9%
Non-transportation	1,541	1,611	1,631	1,686	1,745	1,713	1,843	1,921	2,040	6.2%	3.2%
Transportation	481	519	508	522	495	469	510	546	570	4.5%	1.9%
<b>Pinal</b>	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>18-19p</b>	<b>10-19p</b>
Total Spending	582	625	621	644	640	636	692	752	774	3.0%	3.2%
Visitor Spending	509	535	532	555	568	572	617	666	686	3.0%	3.4%
Non-transportation	433	442	442	465	495	508	545	584	603	3.3%	3.7%
Transportation	76	92	89	89	73	63	73	82	83	0.7%	1.0%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

**Arizona County Direct Travel Spending, 2010-2019p**  
(\$Millions)

	2010	2012	2013	2014	2015	2016	2017	2018	2019	18-19p	10-19p
<b>Santa Cruz</b>											
Total Spending	263	271	288	289	266	234	239	228	235	2.8%	-1.2%
Visitor Spending	254	260	278	278	257	227	231	220	226	2.9%	-1.3%
Non-transportation	233	235	252	254	239	212	215	202	209	3.1%	-1.2%
Transportation	21	25	25	24	19	14	16	17	17	-0.1%	-2.1%
<b>Yavapai</b>											
Total Spending	620	695	715	746	748	763	849	949	1,000	5.4%	5.5%
Visitor Spending	566	632	651	681	707	725	800	879	931	5.9%	5.7%
Non-transportation	499	544	565	596	637	665	730	800	849	6.1%	6.1%
Transportation	67	87	86	85	69	60	70	79	82	3.8%	2.3%
<b>Yuma</b>											
Total Spending	606	657	635	651	623	606	636	651	667	2.5%	1.1%
Visitor Spending	553	594	575	590	575	564	588	598	611	2.2%	1.1%
Non-transportation	478	503	488	504	502	501	518	522	534	2.3%	1.2%
Transportation	76	91	87	87	73	64	70	76	77	1.8%	0.2%
<b>Arizona</b>											
Total Spending	17,775	19,489	19,936	20,762	21,034	21,245	22,679	24,446	25,591	4.7%	4.1%
Visitor Spending	14,502	15,548	15,927	16,678	17,235	17,555	18,708	20,128	21,151	5.1%	4.3%
Non-transportation	11,088	11,757	12,081	12,683	13,394	13,831	14,701	15,744	16,558	5.2%	4.6%
Transportation	3,414	3,791	3,845	3,995	3,841	3,724	4,007	4,384	4,593	4.8%	3.4%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

## APACHE COUNTY Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	108.2	111.5	100.0	102.9	102.2	105.3	105.5	105.0	109.8
Other Travel*	13.8	17.2	16.5	16.1	12.8	11.2	12.3	13.7	13.7
<b>Total</b>	<b>122.0</b>	<b>128.6</b>	<b>116.5</b>	<b>119.1</b>	<b>114.9</b>	<b>116.5</b>	<b>117.9</b>	<b>118.7</b>	<b>123.6</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	49.8	46.8	37.1	38.5	40.3	43.1	43.2	41.1	43.1
Private Home	34.6	39.0	37.7	39.1	37.1	37.1	37.1	38.0	39.7
Campground	7.0	7.7	7.5	7.4	7.1	6.9	7.2	7.5	8.1
Vacation Home	12.1	13.0	12.9	13.1	13.0	13.4	13.3	13.6	13.9
Day Travel	4.6	5.0	4.7	4.8	4.7	4.7	4.8	4.8	5.1
<b>Total</b>	<b>108.2</b>	<b>111.5</b>	<b>100.0</b>	<b>102.9</b>	<b>102.2</b>	<b>105.3</b>	<b>105.5</b>	<b>105.0</b>	<b>109.8</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	22.2	21.0	17.3	17.9	19.1	20.7	20.6	19.7	20.5
Food Service	28.6	29.4	27.4	28.8	29.9	31.9	32.2	32.5	34.7
Food Stores	9.3	10.0	9.6	10.1	10.2	10.4	10.1	10.0	10.5
Local Tran. & Gas	16.5	20.4	18.7	18.5	14.7	12.9	13.8	14.8	15.2
Arts, Ent. & Rec.	8.3	8.3	7.6	7.8	8.0	8.3	8.2	8.1	8.4
Retail Sales	23.3	22.4	19.4	19.9	20.3	21.0	20.6	19.8	20.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>108.2</b>	<b>111.5</b>	<b>100.0</b>	<b>102.9</b>	<b>102.2</b>	<b>105.3</b>	<b>105.5</b>	<b>105.0</b>	<b>109.8</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	21.8	23.0	20.8	21.8	23.5	26.0	26.8	27.6	27.3
Arts, Ent. & Rec.	4.0	3.7	3.4	4.0	4.1	4.3	4.4	4.4	4.7
Retail**	4.8	4.6	4.1	4.4	4.7	5.0	5.1	5.3	5.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.7
<b>Total</b>	<b>31.0</b>	<b>31.9</b>	<b>28.9</b>	<b>30.8</b>	<b>32.9</b>	<b>35.9</b>	<b>36.8</b>	<b>38.0</b>	<b>38.5</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	1,130	1,110	1,050	1,090	1,150	1,240	1,170	1,160	1,090
Arts, Ent. & Rec.	300	240	210	220	210	200	180	180	190
Retail**	210	200	200	210	220	230	210	220	230
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	20	20	30	30	30	30	30	30	30
<b>Total</b>	<b>1,660</b>	<b>1,590</b>	<b>1,480</b>	<b>1,540</b>	<b>1,610</b>	<b>1,700</b>	<b>1,600</b>	<b>1,590</b>	<b>1,540</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	3.9	3.8	3.2	3.3	3.5	3.8	3.9	4.0	4.1
State Tax Receipts	5.9	6.2	5.3	5.4	5.5	5.8	5.8	5.9	6.1
<b>Total</b>	<b>9.8</b>	<b>10.0</b>	<b>8.5</b>	<b>8.6</b>	<b>9.0</b>	<b>9.5</b>	<b>9.7</b>	<b>9.9</b>	<b>10.2</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## COCHISE COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	342.5	316.6	310.8	306.7	302.4	287.0	304.2	304.9	320.1
Other Travel*	27.5	33.2	32.2	31.3	22.8	19.8	23.0	25.6	25.3
<b>Total</b>	<b>370.0</b>	<b>349.8</b>	<b>343.0</b>	<b>338.0</b>	<b>325.3</b>	<b>306.7</b>	<b>327.2</b>	<b>330.5</b>	<b>345.4</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	144.3	111.8	102.4	98.5	106.2	104.5	113.9	113.4	124.2
Private Home	65.6	68.8	68.4	67.4	66.1	62.5	65.2	67.5	69.6
Campground	9.3	10.2	10.0	9.9	9.4	9.2	9.6	10.0	10.8
Vacation Home	6.6	7.0	6.9	6.9	6.9	6.9	6.9	7.2	7.3
Day Travel	116.6	118.8	123.0	124.0	113.9	103.9	108.6	106.9	108.3
<b>Total</b>	<b>342.5</b>	<b>316.6</b>	<b>310.8</b>	<b>306.7</b>	<b>302.4</b>	<b>287.0</b>	<b>304.2</b>	<b>304.9</b>	<b>320.1</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	51.9	40.2	35.2	35.5	38.4	38.8	43.5	42.9	47.8
Food Service	88.0	80.9	81.4	81.2	85.1	84.3	89.4	91.0	96.8
Food Stores	55.8	57.3	59.9	61.7	57.9	52.6	53.8	51.8	52.2
Local Tran. & Gas	47.2	53.0	51.2	48.4	38.7	32.0	35.8	38.6	39.3
Arts, Ent. & Rec.	23.0	20.1	19.6	19.0	20.0	19.7	20.3	20.4	21.3
Retail Sales	76.6	65.1	63.5	61.1	62.3	59.5	61.4	60.2	62.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>342.5</b>	<b>316.6</b>	<b>310.8</b>	<b>306.7</b>	<b>302.4</b>	<b>287.0</b>	<b>304.2</b>	<b>304.9</b>	<b>320.1</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	49.0	48.5	48.8	50.2	51.1	49.7	51.9	53.3	56.6
Arts, Ent. & Rec.	11.0	9.8	10.0	10.4	11.0	11.0	11.6	12.3	13.2
Retail**	18.8	16.8	16.6	17.0	17.4	16.8	17.2	17.2	18.0
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	1.7	1.7	1.8	1.9	1.1	1.2	1.6	1.6	1.6
<b>Total</b>	<b>80.6</b>	<b>76.8</b>	<b>77.3</b>	<b>79.5</b>	<b>80.5</b>	<b>78.6</b>	<b>82.2</b>	<b>84.4</b>	<b>89.4</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	2,480	2,380	2,340	2,360	2,370	2,210	2,110	2,120	2,150
Arts, Ent. & Rec.	760	650	650	680	690	700	670	670	710
Retail**	750	660	650	650	650	630	600	580	600
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	70	60	70	70	50	50	50	50	50
<b>Total</b>	<b>4,070</b>	<b>3,750</b>	<b>3,710</b>	<b>3,750</b>	<b>3,760</b>	<b>3,580</b>	<b>3,430</b>	<b>3,420</b>	<b>3,510</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	15.0	13.1	12.2	12.0	12.6	12.4	13.3	14.0	15.0
State Tax Receipts	16.7	16.0	15.0	14.1	14.5	14.0	14.8	15.0	15.7
<b>Total</b>	<b>31.6</b>	<b>29.1</b>	<b>27.2</b>	<b>26.2</b>	<b>27.1</b>	<b>26.4</b>	<b>28.1</b>	<b>28.9</b>	<b>30.8</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

## COCONINO COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	903.7	993.5	1,027.5	1,111.1	1,181.7	1,264.5	1,397.4	1,513.0	1,628.0
Other Travel*	38.0	56.7	60.6	60.5	54.5	46.7	52.4	56.0	68.6
<b>Total</b>	<b>941.7</b>	<b>1,050.2</b>	<b>1,088.1</b>	<b>1,171.6</b>	<b>1,236.2</b>	<b>1,311.2</b>	<b>1,449.8</b>	<b>1,569.0</b>	<b>1,696.6</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	600.0	664.9	695.2	764.3	832.3	906.3	1,013.2	1,105.3	1,189.9
Private Home	58.1	63.2	63.3	65.9	64.8	64.1	67.8	66.4	74.3
Campground	23.9	26.4	25.9	25.5	24.3	23.7	24.7	25.9	27.8
Vacation Home	31.8	33.9	34.2	35.0	35.3	36.0	36.6	37.8	38.8
Day Travel	189.9	205.2	208.9	220.3	225.1	234.3	255.2	277.6	297.2
<b>Total</b>	<b>903.7</b>	<b>993.5</b>	<b>1,027.5</b>	<b>1,111.1</b>	<b>1,181.7</b>	<b>1,264.5</b>	<b>1,397.4</b>	<b>1,513.0</b>	<b>1,628.0</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	271.3	304.5	323.9	363.9	415.8	462.2	513.3	548.8	580.3
Food Service	214.8	230.7	240.5	260.6	282.2	307.9	342.2	379.7	416.4
Food Stores	48.1	52.1	53.3	57.2	60.6	62.6	66.2	70.4	75.2
Local Tran. & Gas	100.1	126.8	126.0	128.2	105.7	97.0	113.6	132.4	139.1
Arts, Ent. & Rec.	138.0	142.9	145.8	154.6	163.3	174.4	188.9	204.4	218.0
Retail Sales	118.1	122.8	124.9	131.1	137.3	144.3	154.5	165.5	175.9
Visitor Air Tran.	13.4	13.7	13.2	15.5	16.8	16.0	18.6	11.8	22.9
<b>Total</b>	<b>903.7</b>	<b>993.5</b>	<b>1,027.5</b>	<b>1,111.1</b>	<b>1,181.7</b>	<b>1,264.5</b>	<b>1,397.4</b>	<b>1,513.0</b>	<b>1,628.0</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	161.6	169.3	179.4	192.1	202.2	213.6	238.0	261.2	271.1
Arts, Ent. & Rec.	69.3	74.4	76.8	85.2	90.5	97.6	107.8	106.5	116.9
Retail**	24.3	25.0	25.1	27.5	30.0	32.5	33.5	35.2	35.5
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	5.8	5.5	5.4	6.5	7.9	9.4	14.8	13.0	14.3
Other Travel*	5.8	10.2	11.9	12.2	12.8	12.2	15.2	18.0	20.0
<b>Total</b>	<b>266.8</b>	<b>284.3</b>	<b>298.7</b>	<b>323.5</b>	<b>343.3</b>	<b>365.4</b>	<b>409.4</b>	<b>433.9</b>	<b>457.8</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	6,480	6,600	6,820	6,990	7,020	7,330	7,630	8,140	8,250
Arts, Ent. & Rec.	3,140	3,000	3,200	3,410	3,390	3,690	4,040	3,740	3,750
Retail**	930	950	950	990	1,050	1,110	1,100	1,140	1,090
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	110	100	100	120	150	180	220	190	210
Other Travel*	160	310	350	390	420	320	360	430	520
<b>Total</b>	<b>10,820</b>	<b>10,960</b>	<b>11,420</b>	<b>11,890</b>	<b>12,030</b>	<b>12,640</b>	<b>13,340</b>	<b>13,640</b>	<b>13,810</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	45.6	48.9	50.4	55.8	61.9	67.3	72.3	79.1	84.0
State Tax Receipts	42.3	48.4	46.7	48.2	52.1	55.8	62.4	67.9	72.4
<b>Total</b>	<b>87.9</b>	<b>97.2</b>	<b>97.1</b>	<b>104.1</b>	<b>114.0</b>	<b>123.1</b>	<b>134.6</b>	<b>147.0</b>	<b>156.4</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## GILA COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	246.4	266.2	269.0	265.9	268.3	270.3	284.8	286.0	310.6
Other Travel*	10.6	12.5	12.6	12.4	9.5	8.3	9.5	10.5	10.5
<b>Total</b>	<b>257.0</b>	<b>278.7</b>	<b>281.6</b>	<b>278.3</b>	<b>277.8</b>	<b>278.6</b>	<b>294.3</b>	<b>296.5</b>	<b>321.1</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	40.7	47.4	50.6	48.9	53.5	56.4	64.8	62.9	79.0
Private Home	39.0	42.6	42.3	41.3	40.9	40.2	42.1	42.2	44.7
Campground	12.4	13.7	13.4	13.2	12.6	12.3	12.8	13.4	14.4
Vacation Home	13.4	14.0	14.1	14.3	14.3	14.5	14.7	15.1	15.5
Day Travel	140.9	148.4	148.6	148.2	147.0	146.9	150.4	152.3	157.0
<b>Total</b>	<b>246.4</b>	<b>266.2</b>	<b>269.0</b>	<b>265.9</b>	<b>268.3</b>	<b>270.3</b>	<b>284.8</b>	<b>286.0</b>	<b>310.6</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	16.9	18.7	19.6	20.0	22.4	23.9	27.1	26.6	32.4
Food Service	45.4	48.8	50.2	50.3	53.2	55.4	58.9	59.7	66.0
Food Stores	20.2	21.6	21.8	22.1	22.8	22.6	22.8	22.7	23.8
Local Tran. & Gas	30.3	38.2	37.3	35.5	28.5	24.6	27.4	29.5	30.8
Arts, Ent. & Rec.	100.5	104.6	105.8	104.4	107.3	109.6	113.8	113.2	121.5
Retail Sales	33.1	34.2	34.3	33.6	34.1	34.2	34.8	34.4	36.1
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>246.4</b>	<b>266.2</b>	<b>269.0</b>	<b>265.9</b>	<b>268.3</b>	<b>270.3</b>	<b>284.8</b>	<b>286.0</b>	<b>310.6</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	22.4	24.7	26.9	28.5	30.9	34.1	37.1	41.3	43.1
Arts, Ent. & Rec.	25.2	24.6	25.6	28.0	28.8	29.5	30.9	30.6	31.9
Retail**	8.0	8.1	8.0	8.2	8.7	9.0	9.3	9.4	9.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.5	0.4	0.5	0.5	0.4	0.5	0.5	0.5	0.6
<b>Total</b>	<b>56.1</b>	<b>57.7</b>	<b>61.1</b>	<b>65.3</b>	<b>68.8</b>	<b>73.1</b>	<b>77.8</b>	<b>81.9</b>	<b>85.3</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	1,120	1,170	1,240	1,300	1,380	1,500	1,510	1,590	1,570
Arts, Ent. & Rec.	1,200	1,150	1,050	1,030	1,000	1,040	1,020	930	1,020
Retail**	330	320	330	330	340	350	340	330	330
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	20	20	20	20	20	20	20	20	20
<b>Total</b>	<b>2,670</b>	<b>2,660</b>	<b>2,640</b>	<b>2,690</b>	<b>2,740</b>	<b>2,920</b>	<b>2,900</b>	<b>2,880</b>	<b>2,950</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	7.4	7.6	7.6	7.7	8.2	8.6	9.5	9.9	10.7
State Tax Receipts	11.4	12.4	12.1	11.8	12.3	12.5	13.4	13.7	14.7
<b>Total</b>	<b>18.8</b>	<b>20.0</b>	<b>19.8</b>	<b>19.5</b>	<b>20.5</b>	<b>21.1</b>	<b>22.8</b>	<b>23.6</b>	<b>25.4</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

## GRAHAM COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	43.7	53.4	63.7	67.1	50.1	49.2	56.1	56.2	62.6
Other Travel*	7.5	9.0	9.0	9.0	6.8	5.8	6.7	7.5	7.6
<b>Total</b>	<b>51.2</b>	<b>62.5</b>	<b>72.7</b>	<b>76.1</b>	<b>56.9</b>	<b>55.0</b>	<b>62.8</b>	<b>63.7</b>	<b>70.3</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	18.0	25.1	34.7	37.5	23.7	23.0	28.2	27.8	32.1
Private Home	18.5	20.3	20.5	20.9	18.8	18.6	19.8	20.2	21.6
Campground	1.7	1.9	1.9	1.8	1.8	1.7	1.8	1.9	2.0
Vacation Home	0.6	0.6	0.6	0.7	0.6	0.6	0.7	0.7	0.7
Day Travel	4.9	5.6	6.0	6.3	5.2	5.2	5.7	5.7	6.2
<b>Total</b>	<b>43.7</b>	<b>53.4</b>	<b>63.7</b>	<b>67.1</b>	<b>50.1</b>	<b>49.2</b>	<b>56.1</b>	<b>56.2</b>	<b>62.6</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	6.4	9.0	13.2	13.7	8.4	8.3	10.5	10.3	12.2
Food Service	12.6	14.6	16.9	18.2	15.2	15.6	17.5	17.7	19.8
Food Stores	4.3	4.7	5.0	5.3	4.8	4.8	5.0	4.9	5.3
Local Tran. & Gas	7.8	10.2	10.8	10.8	7.3	6.3	7.4	7.9	8.4
Arts, Ent. & Rec.	3.4	3.7	4.2	4.5	3.7	3.7	4.0	4.0	4.3
Retail Sales	9.3	11.2	13.6	14.6	10.7	10.5	11.8	11.5	12.7
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>43.7</b>	<b>53.4</b>	<b>63.7</b>	<b>67.1</b>	<b>50.1</b>	<b>49.2</b>	<b>56.1</b>	<b>56.2</b>	<b>62.6</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	6.3	7.6	8.8	9.0	7.3	7.3	7.8	8.7	9.1
Arts, Ent. & Rec.	2.1	2.3	2.4	2.6	2.1	2.1	2.4	2.4	2.7
Retail**	2.0	2.2	2.5	2.8	2.3	2.3	2.5	2.5	2.6
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.4	0.4	0.4	0.4	0.3	0.3	0.4	0.4	0.4
<b>Total</b>	<b>10.7</b>	<b>12.5</b>	<b>14.1</b>	<b>14.9</b>	<b>12.1</b>	<b>12.1</b>	<b>13.1</b>	<b>14.0</b>	<b>14.9</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	410	470	550	540	420	410	400	440	420
Arts, Ent. & Rec.	370	380	390	400	320	300	370	370	380
Retail**	80	90	100	100	90	90	90	90	90
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	20	20	20	20	10	10	20	20	20
<b>Total</b>	<b>880</b>	<b>950</b>	<b>1,050</b>	<b>1,050</b>	<b>840</b>	<b>810</b>	<b>880</b>	<b>910</b>	<b>910</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	1.8	2.3	2.9	3.1	2.2	2.2	2.6	2.7	3.0
State Tax Receipts	2.5	3.0	3.3	3.3	2.7	2.7	2.9	3.0	3.3
<b>Total</b>	<b>4.3</b>	<b>5.3</b>	<b>6.2</b>	<b>6.4</b>	<b>4.9</b>	<b>4.9</b>	<b>5.6</b>	<b>5.7</b>	<b>6.3</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## GREENLEE COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	8.9	11.0	12.8	13.7	10.7	10.6	11.8	11.8	12.9
Other Travel*	1.6	2.1	2.0	2.1	1.7	1.5	1.6	1.8	1.8
<b>Total</b>	<b>10.5</b>	<b>13.1</b>	<b>14.9</b>	<b>15.8</b>	<b>12.4</b>	<b>12.1</b>	<b>13.4</b>	<b>13.6</b>	<b>14.7</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	3.3	4.5	6.2	6.7	4.3	4.1	5.0	5.0	5.7
Private Home	4.2	4.8	4.9	5.1	4.8	4.8	5.0	5.0	5.3
Campground	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Vacation Home	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	1.1	1.2	1.3	1.4	1.2	1.2	1.3	1.3	1.4
<b>Total</b>	<b>8.9</b>	<b>11.0</b>	<b>12.8</b>	<b>13.7</b>	<b>10.7</b>	<b>10.6</b>	<b>11.8</b>	<b>11.8</b>	<b>12.9</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	1.1	1.6	2.3	2.3	1.5	1.4	1.8	1.8	2.1
Food Service	2.6	3.1	3.6	3.9	3.4	3.5	3.9	3.9	4.3
Food Stores	0.9	1.0	1.1	1.2	1.1	1.1	1.2	1.1	1.2
Local Tran. & Gas	1.6	2.2	2.3	2.4	1.7	1.5	1.7	1.8	1.9
Arts, Ent. & Rec.	0.7	0.8	0.9	1.0	0.8	0.8	0.9	0.9	1.0
Retail Sales	1.9	2.3	2.7	2.9	2.2	2.2	2.4	2.3	2.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>8.9</b>	<b>11.0</b>	<b>12.8</b>	<b>13.7</b>	<b>10.7</b>	<b>10.6</b>	<b>11.8</b>	<b>11.8</b>	<b>12.9</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	1.3	1.5	1.9	2.0	1.6	1.1	1.3	1.2	1.4
Arts, Ent. & Rec.	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Retail**	0.5	0.5	0.6	0.7	0.6	0.6	0.6	0.6	0.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
<b>Total</b>	<b>2.1</b>	<b>2.5</b>	<b>3.0</b>	<b>3.1</b>	<b>2.6</b>	<b>2.1</b>	<b>2.4</b>	<b>2.3</b>	<b>2.6</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	90	100	110	110	100	60	70	70	70
Arts, Ent. & Rec.	10	10	10	20	10	10	20	20	20
Retail**	20	20	20	30	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	0	0	0	10	10	10	10	10	10
<b>Total</b>	<b>130</b>	<b>140</b>	<b>150</b>	<b>160</b>	<b>140</b>	<b>110</b>	<b>110</b>	<b>110</b>	<b>110</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	0.2	0.2	0.3	0.3	0.2	0.2	0.2	0.2	0.3
State Tax Receipts	0.5	0.7	0.7	0.7	0.6	0.6	0.7	0.7	0.7
<b>Total</b>	<b>0.7</b>	<b>0.9</b>	<b>1.0</b>	<b>1.0</b>	<b>0.9</b>	<b>0.8</b>	<b>0.9</b>	<b>0.9</b>	<b>1.0</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

## LA PAZ COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	123.9	137.6	139.2	136.0	136.0	136.3	142.2	159.6	162.7
Other Travel*	3.9	4.8	4.7	4.6	3.6	3.1	3.5	4.0	4.0
<b>Total</b>	<b>127.8</b>	<b>142.4</b>	<b>143.9</b>	<b>140.6</b>	<b>139.6</b>	<b>139.4</b>	<b>145.7</b>	<b>163.7</b>	<b>166.7</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	3.9	8.3	10.2	8.8	10.3	11.0	12.9	23.8	23.6
Private Home	14.3	16.4	16.4	15.6	15.6	15.3	16.2	17.2	16.9
Campground	30.4	32.5	31.9	31.4	30.6	30.4	31.3	32.5	34.7
Vacation Home	16.3	17.1	17.3	17.5	17.3	17.6	18.1	18.9	19.3
Day Travel	59.0	63.3	63.5	62.8	62.1	62.0	63.7	67.3	68.2
<b>Total</b>	<b>123.9</b>	<b>137.6</b>	<b>139.2</b>	<b>136.0</b>	<b>136.0</b>	<b>136.3</b>	<b>142.2</b>	<b>159.6</b>	<b>162.7</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	8.5	10.1	10.8	10.6	11.4	11.9	12.7	16.7	17.5
Food Service	22.8	25.3	26.2	25.9	27.4	28.5	30.2	34.5	35.5
Food Stores	12.1	13.2	13.3	13.4	13.8	13.7	13.8	14.5	14.8
Local Tran. & Gas	17.1	22.0	21.5	20.2	16.2	14.0	15.6	18.1	18.1
Arts, Ent. & Rec.	45.9	48.4	48.8	47.8	48.8	49.8	51.1	55.8	56.7
Retail Sales	17.5	18.5	18.6	18.1	18.4	18.4	18.7	20.1	20.2
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>123.9</b>	<b>137.6</b>	<b>139.2</b>	<b>136.0</b>	<b>136.0</b>	<b>136.3</b>	<b>142.2</b>	<b>159.6</b>	<b>162.7</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	10.6	12.5	13.4	13.3	13.6	13.3	14.2	17.0	18.5
Arts, Ent. & Rec.	13.6	14.4	14.8	15.1	15.5	15.9	16.5	18.2	18.8
Retail**	4.2	4.3	4.3	4.4	4.6	4.8	4.9	5.4	6.0
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2
<b>Total</b>	<b>28.5</b>	<b>31.3</b>	<b>32.6</b>	<b>32.9</b>	<b>33.9</b>	<b>34.1</b>	<b>35.8</b>	<b>40.8</b>	<b>43.5</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	560	650	700	690	670	670	650	730	730
Arts, Ent. & Rec.	450	480	500	510	480	490	470	490	480
Retail**	180	180	180	170	180	190	180	190	200
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	10	10	10	10	10	10	10	10	10
<b>Total</b>	<b>1,200</b>	<b>1,310</b>	<b>1,380</b>	<b>1,380</b>	<b>1,330</b>	<b>1,350</b>	<b>1,300</b>	<b>1,410</b>	<b>1,410</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	4.0	4.4	4.3	4.2	4.4	4.5	5.3	6.2	6.5
State Tax Receipts	5.7	6.3	6.2	5.9	6.1	6.1	6.4	7.2	7.4
<b>Total</b>	<b>9.7</b>	<b>10.7</b>	<b>10.6</b>	<b>10.1</b>	<b>10.5</b>	<b>10.6</b>	<b>11.6</b>	<b>13.5</b>	<b>13.9</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## MARICOPA COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	8,106	8,756	9,051	9,585	10,071	10,383	10,963	11,971	12,518
Other Travel*	2,401	2,838	2,966	3,035	2,925	2,873	3,057	3,345	3,427
<b>Total</b>	<b>10,507</b>	<b>11,594</b>	<b>12,017</b>	<b>12,620</b>	<b>12,995</b>	<b>13,255</b>	<b>14,020</b>	<b>15,316</b>	<b>15,945</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	4,269	4,657	4,839	5,178	5,575	5,803	6,170	6,835	7,196
Private Home	2,255	2,381	2,451	2,568	2,648	2,699	2,821	3,015	3,129
Campground	231	245	253	271	267	269	279	296	318
Vacation Home	257	278	284	294	299	308	317	331	343
Day Travel	1,093	1,195	1,223	1,273	1,281	1,304	1,376	1,494	1,531
<b>Total</b>	<b>8,106</b>	<b>8,756</b>	<b>9,051</b>	<b>9,585</b>	<b>10,071</b>	<b>10,383</b>	<b>10,963</b>	<b>11,971</b>	<b>12,518</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	1,372	1,526	1,600	1,751	1,979	2,066	2,211	2,459	2,694
Food Service	1,829	1,984	2,070	2,200	2,348	2,499	2,663	2,930	3,046
Food Stores	271	294	303	323	339	344	351	370	380
Local Tran. & Gas	1,038	1,204	1,224	1,261	1,165	1,139	1,222	1,364	1,373
Arts, Ent. & Rec.	1,083	1,132	1,156	1,203	1,252	1,305	1,356	1,453	1,471
Retail Sales	1,201	1,262	1,286	1,327	1,371	1,407	1,449	1,541	1,554
Visitor Air Tran.	1,311	1,353	1,411	1,520	1,618	1,623	1,711	1,853	1,999
<b>Total</b>	<b>8,106</b>	<b>8,756</b>	<b>9,051</b>	<b>9,585</b>	<b>10,071</b>	<b>10,383</b>	<b>10,963</b>	<b>11,971</b>	<b>12,518</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	1,153	1,248	1,319	1,395	1,487	1,544	1,663	1,806	1,869
Arts, Ent. & Rec.	510	556	585	637	666	701	743	818	880
Retail**	197	206	207	224	241	256	265	282	287
Ground Tran.	109	119	120	129	139	149	170	183	197
Visitor Air Tran.	564	602	602	610	684	693	764	789	814
Other Travel*	740	851	890	889	944	968	1,031	1,083	1,073
<b>Total</b>	<b>3,273</b>	<b>3,582</b>	<b>3,723</b>	<b>3,884</b>	<b>4,162</b>	<b>4,310</b>	<b>4,635</b>	<b>4,961</b>	<b>5,120</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	40,040	41,710	43,650	45,010	46,470	47,530	48,800	50,750	50,840
Arts, Ent. & Rec.	15,710	16,560	17,510	18,710	20,000	20,020	20,750	22,330	23,220
Retail**	5,890	5,910	6,070	6,390	6,750	7,050	7,120	7,240	7,100
Ground Tran.	2,780	2,970	3,040	3,160	3,320	3,600	4,030	4,130	4,340
Visitor Air Tran.	6,770	7,160	7,000	7,300	7,720	7,820	8,010	8,360	8,440
Other Travel*	11,860	13,170	12,890	13,960	14,930	15,250	15,090	14,860	14,880
<b>Total</b>	<b>83,060</b>	<b>87,480</b>	<b>90,160</b>	<b>94,530</b>	<b>99,180</b>	<b>101,270</b>	<b>103,800</b>	<b>107,660</b>	<b>108,810</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	447	476	495	516	565	590	640	773	804
State Tax Receipts	418	473	467	463	492	507	549	602	623
<b>Total</b>	<b>865</b>	<b>949</b>	<b>962</b>	<b>979</b>	<b>1,057</b>	<b>1,098</b>	<b>1,189</b>	<b>1,375</b>	<b>1,427</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## MOHAVE COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	460.6	473.6	497.1	494.5	483.6	490.3	541.2	569.1	608.1
Other Travel*	69.2	80.4	83.3	86.3	40.7	38.9	58.3	60.4	58.8
<b>Total</b>	<b>529.9</b>	<b>554.0</b>	<b>580.4</b>	<b>580.8</b>	<b>524.3</b>	<b>529.2</b>	<b>599.5</b>	<b>629.5</b>	<b>667.0</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	119.0	120.0	124.7	132.6	137.2	144.9	162.7	182.8	210.9
Private Home	155.7	160.8	173.5	165.5	155.2	153.8	173.2	174.2	175.6
Campground	20.5	22.6	22.2	21.8	20.8	20.4	21.2	22.2	23.8
Vacation Home	37.8	40.4	40.6	41.3	41.5	42.0	43.1	44.4	45.9
Day Travel	127.6	129.8	136.1	133.2	128.9	129.3	141.2	145.6	151.8
<b>Total</b>	<b>460.6</b>	<b>473.6</b>	<b>497.1</b>	<b>494.5</b>	<b>483.6</b>	<b>490.3</b>	<b>541.2</b>	<b>569.1</b>	<b>608.1</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	55.3	56.5	58.7	64.0	69.3	74.8	82.8	89.5	101.6
Food Service	128.8	129.4	138.7	139.3	142.4	149.3	166.3	175.5	189.6
Food Stores	43.1	44.1	46.7	46.5	46.8	46.8	50.0	50.3	52.2
Local Tran. & Gas	75.5	89.7	92.2	86.8	67.7	58.8	69.4	76.4	78.3
Arts, Ent. & Rec.	84.3	82.0	85.7	84.7	84.8	87.2	94.3	97.5	102.8
Retail Sales	73.6	71.9	75.1	73.2	72.6	73.3	78.6	80.0	83.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>460.6</b>	<b>473.6</b>	<b>497.1</b>	<b>494.5</b>	<b>483.6</b>	<b>490.3</b>	<b>541.2</b>	<b>569.1</b>	<b>608.1</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	62.8	61.3	66.8	71.6	89.8	100.3	112.3	118.0	113.5
Arts, Ent. & Rec.	31.8	32.0	34.5	39.0	39.2	40.6	41.7	46.7	34.8
Retail**	18.0	17.3	18.0	18.2	18.8	19.6	21.1	21.9	22.9
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	12.5	13.1	14.6	16.1	3.1	4.3	9.9	9.2	8.6
<b>Total</b>	<b>125.1</b>	<b>123.8</b>	<b>133.9</b>	<b>144.9</b>	<b>150.9</b>	<b>164.8</b>	<b>185.0</b>	<b>195.7</b>	<b>179.9</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	3,220	2,950	3,110	3,290	3,940	4,220	4,390	4,430	4,140
Arts, Ent. & Rec.	1,630	1,580	1,590	1,750	1,790	1,700	1,660	1,770	1,350
Retail**	630	600	620	610	620	640	650	660	680
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	430	430	430	450	110	150	260	230	220
<b>Total</b>	<b>5,900</b>	<b>5,560</b>	<b>5,750</b>	<b>6,100</b>	<b>6,450</b>	<b>6,710</b>	<b>6,960</b>	<b>7,090</b>	<b>6,400</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	16.9	16.5	17.5	18.1	19.3	20.6	23.2	25.2	25.5
State Tax Receipts	23.2	24.3	24.4	23.7	24.1	24.8	27.8	29.4	30.0
<b>Total</b>	<b>40.1</b>	<b>40.8</b>	<b>41.9</b>	<b>41.8</b>	<b>43.4</b>	<b>45.5</b>	<b>51.0</b>	<b>54.6</b>	<b>55.6</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## NAVAJO COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	254.4	278.5	280.8	283.0	282.7	288.6	311.9	321.8	355.2
Other Travel*	21.0	25.4	24.8	24.5	19.3	16.9	18.8	21.2	21.3
<b>Total</b>	<b>275.4</b>	<b>303.9</b>	<b>305.7</b>	<b>307.4</b>	<b>302.1</b>	<b>305.5</b>	<b>330.7</b>	<b>343.0</b>	<b>376.4</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	114.3	128.1	130.4	131.3	134.1	139.0	157.4	161.8	188.0
Private Home	52.4	58.5	57.7	58.2	55.8	55.3	57.7	59.4	61.8
Campground	16.7	16.4	16.8	16.2	16.1	16.3	16.8	17.8	19.1
Vacation Home	45.2	47.4	47.9	48.9	48.9	50.0	50.4	52.0	53.3
Day Travel	25.8	28.1	28.1	28.3	27.8	28.0	29.6	30.8	33.0
<b>Total</b>	<b>254.4</b>	<b>278.5</b>	<b>280.8</b>	<b>283.0</b>	<b>282.7</b>	<b>288.6</b>	<b>311.9</b>	<b>321.8</b>	<b>355.2</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	50.1	55.0	56.5	57.0	59.5	63.3	69.7	69.5	78.7
Food Service	65.5	70.7	72.2	74.3	77.6	81.7	88.5	92.9	103.7
Food Stores	19.1	20.4	20.6	21.2	21.8	21.9	22.4	22.7	24.1
Local Tran. & Gas	33.9	42.7	41.7	40.4	32.3	28.2	32.0	35.4	37.4
Arts, Ent. & Rec.	29.6	30.0	30.2	30.3	30.9	31.9	33.2	34.1	36.5
Retail Sales	56.3	59.6	59.7	59.7	60.7	61.7	66.0	67.4	74.8
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>254.4</b>	<b>278.5</b>	<b>280.8</b>	<b>283.0</b>	<b>282.7</b>	<b>288.6</b>	<b>311.9</b>	<b>321.8</b>	<b>355.2</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	48.0	52.1	53.5	54.5	58.7	61.1	67.2	70.6	74.3
Arts, Ent. & Rec.	17.9	21.7	21.8	22.8	23.3	24.3	25.8	29.7	22.0
Retail**	10.1	10.5	10.4	10.9	11.5	12.1	12.4	12.1	12.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.8	0.8	0.8	0.8	0.8	0.8	0.9	0.9	1.0
<b>Total</b>	<b>76.9</b>	<b>85.2</b>	<b>86.5</b>	<b>89.0</b>	<b>94.3</b>	<b>98.2</b>	<b>106.3</b>	<b>113.3</b>	<b>109.3</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	2,250	2,300	2,330	2,350	2,420	2,450	2,490	2,520	2,530
Arts, Ent. & Rec.	810	890	900	940	1,040	1,040	1,090	1,140	930
Retail**	410	420	410	420	440	460	440	430	430
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	40	40	40	40	40	40	40	40	40
<b>Total</b>	<b>3,520</b>	<b>3,650</b>	<b>3,690</b>	<b>3,760</b>	<b>3,940</b>	<b>4,000</b>	<b>4,070</b>	<b>4,130</b>	<b>3,940</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	10.6	11.4	10.9	11.1	12.1	12.6	13.9	14.8	15.7
State Tax Receipts	13.2	14.9	14.2	13.8	14.3	14.6	15.9	16.7	17.7
<b>Total</b>	<b>23.9</b>	<b>26.3</b>	<b>25.0</b>	<b>24.9</b>	<b>26.3</b>	<b>27.2</b>	<b>29.8</b>	<b>31.5</b>	<b>33.4</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

**PIMA COUNTY**  
**Travel Impacts, 2010-2019p**

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	2,022.0	2,129.5	2,139.7	2,208.3	2,240.0	2,182.7	2,353.5	2,467.0	2,609.9
Other Travel*	490.6	634.8	573.4	575.8	531.6	514.4	549.0	554.5	578.8
<b>Total</b>	<b>2,512.6</b>	<b>2,764.2</b>	<b>2,713.1</b>	<b>2,784.1</b>	<b>2,771.7</b>	<b>2,697.1</b>	<b>2,902.5</b>	<b>3,021.5</b>	<b>3,188.7</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	895.2	945.7	952.7	994.0	1,053.5	1,032.8	1,109.5	1,176.7	1,250.9
Private Home	451.7	467.6	460.3	474.4	473.2	469.3	497.7	520.5	543.1
Campground	29.3	32.5	31.9	31.4	30.2	29.6	30.8	32.2	34.6
Vacation Home	47.4	50.3	50.8	51.9	52.2	53.0	54.2	56.1	57.7
Day Travel	598.5	633.3	644.0	656.6	631.0	597.9	661.3	681.5	723.6
<b>Total</b>	<b>2,022.0</b>	<b>2,129.5</b>	<b>2,139.7</b>	<b>2,208.3</b>	<b>2,240.0</b>	<b>2,182.7</b>	<b>2,353.5</b>	<b>2,467.0</b>	<b>2,609.9</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	316.2	330.0	333.3	349.2	378.5	377.6	401.9	437.1	481.6
Food Service	507.9	541.6	552.2	576.5	610.5	610.0	662.4	694.0	731.8
Food Stores	128.8	137.8	140.3	146.3	146.3	138.9	149.3	151.5	160.4
Local Tran. & Gas	278.0	320.7	318.1	320.6	291.9	264.9	291.2	309.9	316.0
Arts, Ent. & Rec.	174.5	178.4	177.3	181.0	186.2	184.6	193.3	197.7	202.0
Retail Sales	413.2	423.0	428.1	432.8	423.0	401.9	436.3	441.1	464.1
Visitor Air Tran.	203.5	198.0	190.3	201.9	203.6	204.6	219.1	235.8	254.0
<b>Total</b>	<b>2,022.0</b>	<b>2,129.5</b>	<b>2,139.7</b>	<b>2,208.3</b>	<b>2,240.0</b>	<b>2,182.7</b>	<b>2,353.5</b>	<b>2,467.0</b>	<b>2,609.9</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	297.6	333.8	337.1	360.3	393.0	407.4	443.6	446.1	476.7
Arts, Ent. & Rec.	76.8	75.7	75.3	84.9	87.8	87.8	93.8	105.4	107.0
Retail**	72.0	73.4	73.2	77.5	79.4	78.1	81.3	82.4	85.8
Ground Tran.	27.4	29.5	29.2	30.9	33.4	33.2	37.9	41.8	45.7
Visitor Air Tran.	10.9	9.4	7.5	9.9	10.8	11.9	11.5	12.0	12.5
Other Travel*	52.3	83.5	64.7	67.2	69.2	74.2	74.6	64.5	68.4
<b>Total</b>	<b>537.1</b>	<b>605.4</b>	<b>587.1</b>	<b>630.8</b>	<b>673.6</b>	<b>692.6</b>	<b>742.7</b>	<b>752.2</b>	<b>796.1</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	12,420	13,330	13,340	13,810	14,290	14,630	14,780	14,300	14,550
Arts, Ent. & Rec.	4,090	4,080	4,060	4,350	4,440	4,640	4,700	5,170	5,030
Retail**	2,560	2,520	2,510	2,610	2,610	2,550	2,570	2,510	2,510
Ground Tran.	700	740	740	750	800	800	900	950	1,010
Visitor Air Tran.	210	180	130	170	170	180	160	170	170
Other Travel*	1,450	2,110	1,820	1,750	1,750	1,900	1,860	1,570	1,490
<b>Total</b>	<b>21,440</b>	<b>22,950</b>	<b>22,600</b>	<b>23,440</b>	<b>24,050</b>	<b>24,700</b>	<b>24,970</b>	<b>24,670</b>	<b>24,770</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	72.5	75.9	75.1	76.9	82.4	82.8	72.8	76.6	80.6
State Tax Receipts	106.0	118.5	112.9	111.0	115.6	114.0	125.6	132.2	139.1
<b>Total</b>	<b>178.5</b>	<b>194.4</b>	<b>187.9</b>	<b>187.9</b>	<b>198.0</b>	<b>196.8</b>	<b>198.4</b>	<b>208.8</b>	<b>219.7</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## PINAL COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	508.7	534.7	531.8	554.5	567.8	571.6	617.4	666.0	685.7
Other Travel*	73.3	90.4	89.0	89.5	72.6	64.2	74.3	85.6	88.6
<b>Total</b>	<b>582.0</b>	<b>625.1</b>	<b>620.7</b>	<b>644.0</b>	<b>640.4</b>	<b>635.8</b>	<b>691.7</b>	<b>751.6</b>	<b>774.3</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	34.7	37.8	33.3	33.4	38.1	38.9	49.0	60.8	61.6
Private Home	237.3	243.2	245.0	260.1	269.2	270.8	291.0	310.0	315.9
Campground	46.6	51.4	50.5	49.6	47.3	46.3	48.1	50.4	54.2
Vacation Home	74.8	79.5	80.5	84.2	86.2	89.4	93.5	99.0	104.6
Day Travel	115.4	122.8	122.4	127.3	127.0	126.2	135.9	145.8	149.5
<b>Total</b>	<b>508.7</b>	<b>534.7</b>	<b>531.8</b>	<b>554.5</b>	<b>567.8</b>	<b>571.6</b>	<b>617.4</b>	<b>666.0</b>	<b>685.7</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	40.3	42.9	41.7	43.0	46.8	48.7	53.9	60.7	64.8
Food Service	166.0	171.1	173.3	184.7	199.0	207.8	226.3	245.3	255.7
Food Stores	46.8	49.0	49.2	52.3	55.2	55.1	57.2	59.6	61.4
Local Tran. & Gas	75.6	92.3	89.4	89.4	73.1	63.4	72.5	82.4	83.0
Arts, Ent. & Rec.	73.7	73.5	73.1	76.3	79.9	81.9	86.7	91.4	93.0
Retail Sales	106.2	105.9	105.0	108.9	113.8	114.6	120.7	126.5	127.9
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>508.7</b>	<b>534.7</b>	<b>531.8</b>	<b>554.5</b>	<b>567.8</b>	<b>571.6</b>	<b>617.4</b>	<b>666.0</b>	<b>685.7</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	72.5	79.4	76.8	78.1	84.8	103.7	114.3	117.6	129.9
Arts, Ent. & Rec.	28.9	31.0	31.1	33.6	35.4	36.6	36.6	38.2	37.4
Retail**	21.0	20.7	20.3	22.0	23.9	24.9	26.1	27.3	28.6
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	2.7	2.6	2.7	2.9	3.0	3.2	3.5	3.7	4.2
<b>Total</b>	<b>125.1</b>	<b>133.7</b>	<b>131.0</b>	<b>136.6</b>	<b>147.1</b>	<b>168.4</b>	<b>180.5</b>	<b>186.9</b>	<b>200.2</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	3,030	3,310	3,510	3,470	3,650	4,340	4,370	4,270	4,500
Arts, Ent. & Rec.	1,120	1,310	1,270	1,300	1,350	1,470	1,400	1,390	1,280
Retail**	770	760	760	800	870	880	890	900	920
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	130	120	130	140	140	140	150	150	160
<b>Total</b>	<b>5,050</b>	<b>5,500</b>	<b>5,660</b>	<b>5,710</b>	<b>6,010</b>	<b>6,840</b>	<b>6,810</b>	<b>6,710</b>	<b>6,860</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	19.3	19.7	19.3	19.7	21.4	22.8	24.9	27.2	28.4
State Tax Receipts	27.4	29.3	28.1	27.8	29.5	30.5	33.0	35.3	36.7
<b>Total</b>	<b>46.7</b>	<b>49.0</b>	<b>47.3</b>	<b>47.6</b>	<b>50.8</b>	<b>53.2</b>	<b>57.9</b>	<b>62.5</b>	<b>65.1</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental

Federal tax receipts not included.

## SANTA CRUZ COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	253.6	260.0	277.7	278.2	257.5	226.7	231.1	219.6	225.9
Other Travel*	9.1	11.2	10.8	10.5	8.3	7.0	8.0	8.9	8.9
<b>Total</b>	<b>262.7</b>	<b>271.2</b>	<b>288.5</b>	<b>288.6</b>	<b>265.8</b>	<b>233.8</b>	<b>239.1</b>	<b>228.4</b>	<b>234.7</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	36.2	31.0	35.1	32.6	39.2	32.8	35.0	37.4	39.3
Private Home	34.9	38.2	38.0	36.0	35.8	33.3	35.7	37.3	37.7
Campground	1.2	1.4	1.3	1.3	1.3	1.2	1.3	1.3	1.4
Vacation Home	1.3	1.3	1.3	1.3	1.3	1.3	1.4	1.4	1.4
Day Travel	180.0	188.2	201.9	206.9	179.9	158.0	157.8	142.1	146.0
<b>Total</b>	<b>253.6</b>	<b>260.0</b>	<b>277.7</b>	<b>278.2</b>	<b>257.5</b>	<b>226.7</b>	<b>231.1</b>	<b>219.6</b>	<b>225.9</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	15.5	12.8	14.0	13.4	16.4	14.0	15.1	15.9	17.1
Food Service	41.2	41.5	44.8	44.4	45.4	42.0	44.2	44.4	46.2
Food Stores	83.8	88.6	95.3	98.9	88.3	77.6	77.0	69.5	71.5
Local Tran. & Gas	20.7	25.0	25.5	23.9	18.6	14.5	16.1	17.2	17.1
Arts, Ent. & Rec.	9.1	8.5	9.0	8.4	9.4	8.5	8.9	9.2	9.3
Retail Sales	83.3	83.7	89.1	89.1	79.3	70.1	69.8	63.4	64.6
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>253.6</b>	<b>260.0</b>	<b>277.7</b>	<b>278.2</b>	<b>257.5</b>	<b>226.7</b>	<b>231.1</b>	<b>219.6</b>	<b>225.9</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	20.8	19.1	19.8	22.3	27.7	25.3	25.8	26.8	30.7
Arts, Ent. & Rec.	4.2	4.3	4.4	5.2	5.9	5.4	5.7	6.1	6.3
Retail**	23.6	23.1	24.2	25.3	23.6	21.5	21.8	20.8	20.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.5
<b>Total</b>	<b>48.8</b>	<b>46.9</b>	<b>48.7</b>	<b>53.3</b>	<b>57.5</b>	<b>52.6</b>	<b>53.7</b>	<b>54.1</b>	<b>57.6</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	970	900	930	1,040	1,220	1,110	1,030	1,020	1,140
Arts, Ent. & Rec.	290	290	330	390	440	400	400	400	390
Retail**	720	710	740	730	680	580	570	540	520
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	0	0	0	0	0	0	0	0	0
Other Travel*	20	20	20	20	20	20	20	20	20
<b>Total</b>	<b>2,000</b>	<b>1,920</b>	<b>2,020</b>	<b>2,180</b>	<b>2,360</b>	<b>2,110</b>	<b>2,010</b>	<b>1,980</b>	<b>2,070</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	8.2	7.9	8.1	8.0	8.2	7.3	7.8	7.8	8.1
State Tax Receipts	10.5	11.1	11.1	10.6	10.4	9.3	9.6	9.5	9.8
<b>Total</b>	<b>18.7</b>	<b>18.9</b>	<b>19.1</b>	<b>18.6</b>	<b>18.5</b>	<b>16.6</b>	<b>17.4</b>	<b>17.3</b>	<b>18.0</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## YAVAPAI COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Destination Spending	566.4	631.9	650.8	680.9	706.6	725.5	800.0	879.3	931.3
Other Travel*	53.6	62.8	64.1	65.3	41.6	37.6	48.6	70.2	69.2
<b>Total</b>	<b>620.0</b>	<b>694.7</b>	<b>714.9</b>	<b>746.2</b>	<b>748.2</b>	<b>763.1</b>	<b>848.6</b>	<b>949.5</b>	<b>1,000.5</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Hotel, Motel, STVR***	209.7	245.6	261.6	282.8	311.4	330.6	384.4	442.5	481.2
Private Home	78.6	87.5	87.8	89.6	87.3	86.3	92.3	96.8	99.6
Campground	12.6	13.8	13.5	14.7	14.6	14.8	15.2	16.1	17.3
Vacation Home	23.9	25.4	25.8	26.7	27.0	27.7	28.5	29.5	30.5
Day Travel	241.6	259.6	262.0	267.1	266.3	266.1	279.6	294.4	302.6
<b>Total</b>	<b>566.4</b>	<b>631.9</b>	<b>650.8</b>	<b>680.9</b>	<b>706.6</b>	<b>725.5</b>	<b>800.0</b>	<b>879.3</b>	<b>931.3</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accommodations	104.4	122.7	133.3	147.4	169.7	187.1	217.9	249.8	273.7
Food Service	115.8	127.1	132.4	139.9	149.2	155.7	171.8	189.5	202.2
Food Stores	40.7	44.4	45.3	47.6	49.6	49.4	51.3	53.5	55.4
Local Tran. & Gas	66.6	85.7	84.9	84.4	68.5	59.3	68.5	78.7	80.2
Arts, Ent. & Rec.	160.5	168.3	170.9	176.0	182.0	185.8	197.2	209.8	217.1
Retail Sales	77.6	81.8	83.0	84.7	87.0	87.5	92.1	97.3	100.3
Visitor Air Tran.	0.8	1.8	1.0	0.8	0.7	0.8	1.3	0.8	2.3
<b>Total</b>	<b>566.4</b>	<b>631.9</b>	<b>650.8</b>	<b>680.9</b>	<b>706.6</b>	<b>725.5</b>	<b>800.0</b>	<b>879.3</b>	<b>931.3</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	73.5	85.8	93.1	100.6	114.9	125.1	137.4	150.5	161.6
Arts, Ent. & Rec.	67.9	64.4	63.4	67.2	69.7	71.7	77.2	83.8	88.6
Retail**	16.4	17.1	17.1	18.2	19.6	20.3	21.6	22.7	23.4
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.3	0.4	0.3	0.3	0.5	0.7	0.9	0.7	0.5
Other Travel*	6.1	5.9	6.7	7.4	2.4	2.9	5.4	11.6	10.4
<b>Total</b>	<b>164.3</b>	<b>173.5</b>	<b>180.5</b>	<b>193.8</b>	<b>207.1</b>	<b>220.7</b>	<b>242.5</b>	<b>269.3</b>	<b>284.5</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	3,040	3,430	3,590	3,810	4,110	4,370	4,520	4,740	4,880
Arts, Ent. & Rec.	3,540	3,430	3,460	3,790	3,840	3,820	4,080	4,170	4,440
Retail**	650	660	660	690	720	730	740	770	770
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	10	10	10	10	10	10	10
Other Travel*	240	200	190	200	100	110	150	220	200
<b>Total</b>	<b>7,480</b>	<b>7,730</b>	<b>7,910</b>	<b>8,500</b>	<b>8,790</b>	<b>9,040</b>	<b>9,510</b>	<b>9,910</b>	<b>10,300</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	2010	2012	2013	2014	2015	2016	2017	2018	2019
Local Tax Receipts	24.4	26.2	28.1	30.0	33.2	35.5	40.5	46.4	49.5
State Tax Receipts	28.0	31.6	30.9	31.1	33.1	34.2	37.9	41.9	44.2
<b>Total</b>	<b>52.3</b>	<b>57.8</b>	<b>59.0</b>	<b>61.1</b>	<b>66.3</b>	<b>69.6</b>	<b>78.4</b>	<b>88.3</b>	<b>93.7</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## YUMA COUNTY

### Travel Impacts, 2010-2019p

<b>Total Direct Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Destination Spending	553.0	594.5	575.1	590.4	574.7	564.1	588.2	597.7	611.0
Other Travel*	52.6	62.3	60.2	60.8	48.6	42.0	48.0	53.2	56.0
<b>Total</b>	<b>605.7</b>	<b>656.7</b>	<b>635.3</b>	<b>651.2</b>	<b>623.3</b>	<b>606.1</b>	<b>636.2</b>	<b>650.9</b>	<b>667.0</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Hotel, Motel, STVR***	130.3	149.2	131.9	137.7	145.8	150.6	165.5	166.1	171.4
Private Home	79.9	87.7	86.7	90.8	88.6	87.2	91.6	94.7	98.3
Campground	74.8	72.9	68.0	66.9	65.3	64.9	66.8	70.4	75.5
Vacation Home	44.5	48.2	48.5	49.5	49.6	50.4	51.7	53.9	55.4
Day Travel	223.5	236.3	240.0	245.4	225.4	211.0	212.7	212.5	210.2
<b>Total</b>	<b>553.0</b>	<b>594.5</b>	<b>575.1</b>	<b>590.4</b>	<b>574.7</b>	<b>564.1</b>	<b>588.2</b>	<b>597.7</b>	<b>611.0</b>
<b>Visitor Spending By Commodity Purchased (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accommodations	60.1	65.2	59.0	62.1	67.2	70.4	77.1	78.7	83.2
Food Service	107.3	116.5	113.8	119.2	122.4	126.0	133.4	136.8	142.5
Food Stores	69.1	73.5	75.1	78.4	74.3	69.6	69.0	68.3	68.1
Local Tran. & Gas	63.2	79.4	74.2	73.2	57.5	49.2	55.0	59.9	60.4
Arts, Ent. & Rec.	120.9	124.4	115.6	117.6	120.6	123.7	128.5	129.8	133.8
Retail Sales	120.1	123.7	124.9	126.4	117.6	110.9	110.4	108.5	106.4
Visitor Air Tran.	12.3	11.7	12.5	13.6	15.0	14.4	14.9	15.6	16.5
<b>Total</b>	<b>553.0</b>	<b>594.5</b>	<b>575.1</b>	<b>590.4</b>	<b>574.7</b>	<b>564.1</b>	<b>588.2</b>	<b>597.7</b>	<b>611.0</b>
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	62.4	63.7	63.7	64.6	68.7	73.0	78.4	82.5	90.1
Arts, Ent. & Rec.	50.0	52.0	45.5	48.5	49.9	51.5	54.4	54.1	64.9
Retail**	27.4	27.7	27.5	29.1	28.5	27.9	28.2	29.1	28.8
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Visitor Air Tran.	0.7	0.3	0.3	0.3	0.4	0.5	0.7	0.8	0.7
Other Travel*	2.8	2.3	2.5	2.6	2.0	2.2	2.8	2.9	3.1
<b>Total</b>	<b>143.2</b>	<b>145.9</b>	<b>139.4</b>	<b>145.2</b>	<b>149.5</b>	<b>155.1</b>	<b>164.5</b>	<b>169.4</b>	<b>187.7</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Accom. & Food Serv.	2,850	2,840	2,850	2,830	2,940	3,060	3,040	3,060	3,140
Arts, Ent. & Rec.	2,140	2,490	2,160	2,190	2,340	2,360	2,290	2,240	2,890
Retail**	960	920	900	930	890	850	820	810	790
Ground Tran.	0	0	0	0	0	0	0	0	0
Visitor Air Tran.	10	10	10	10	10	10	20	20	20
Other Travel*	100	90	90	90	80	80	90	90	90
<b>Total</b>	<b>6,070</b>	<b>6,340</b>	<b>6,010</b>	<b>6,050</b>	<b>6,260</b>	<b>6,370</b>	<b>6,250</b>	<b>6,210</b>	<b>6,930</b>
<b>Tax Receipts Generated by Travel Spending (\$Million)</b>									
	<b>2010</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Local Tax Receipts	21.3	21.9	20.8	21.1	21.6	21.9	22.4	23.4	24.6
State Tax Receipts	26.7	29.1	27.0	26.3	26.5	26.4	28.1	28.9	30.1
<b>Total</b>	<b>47.9</b>	<b>50.9</b>	<b>47.7</b>	<b>47.4</b>	<b>48.1</b>	<b>48.3</b>	<b>50.5</b>	<b>52.2</b>	<b>54.7</b>

Details may not add to total due to rounding.

\*Other Travel includes ground transportation and air travel impacts for travel to other Arizona visitor destinations and travel arrangement services.

\*\*Retail includes gasoline.

\*\*\*STVR stands for Short Term Vacation Rental  
Federal tax receipts not included.

## **APPENDICES**

Appendix A	2019 Travel Impact Estimates
Appendix B	Key Terms and Definitions
Appendix C	Regional Travel Impact Model
Appendix D	Travel Industry Accounts
Appendix E	Arizona Earnings and Employment by Industry Sector
Appendix F	Industry Groups

**2019 TRAVEL IMPACT ESTIMATES**

This appendix provides a brief overview of the methodology, terminology and limitations of the travel impact and visitor volume estimates.

**DIRECT IMPACTS**

The estimates of the direct impacts associated with traveler spending in Arizona were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts of the Arizona travel industry were gathered from various local, state and federal sources.

Travel impacts consist of estimates of travel spending and the employment, earnings, and state and local taxes generated by this spending. These estimates are also broken out by type of traveler accommodation and by the type of business in which the expenditures occur.

**PRELIMINARY ESTIMATES**

Preliminary estimates for 2019 were prepared at the state, regional and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2019 becomes available.

**TRANSPORTATION IMPACTS**

The treatment of ground transportation expenditures depends upon the level of geography (county, region or state). County and regional level estimates of destination spending include only a portion of ground transportation expenditures because some county and regional transportation expenditures are for travel to other Arizona destinations. These expenditures are allocated to "other travel." State level estimates include all in-state expenditures for ground transportation.

**SECONDARY (INDIRECT AND INDUCED) IMPACTS**

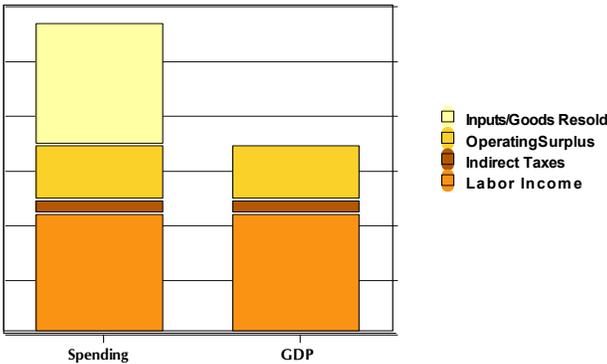
Direct impacts are reported for all counties within Arizona. Secondary employment and earnings impacts over and above direct impacts are reported at the state level only for the year 2019. These indirect and induced impacts are generated from the direct impacts produced by the RTIM, discussed above, and an input-output model of the Arizona economy prepared by the IMPLAN Group, Inc. Indirect impacts represent the purchases of goods and services from other firms by businesses that directly receive expenditures from travelers. Hotels, for example, purchase maintenance services from independent contractors. Induced impacts represent the purchase of goods and services by employees whose earnings are in part derived from travel expenditures. The sum of the direct,

indirect and induced impacts equals the total impact of all spending by visitors in the state. The "multiplier" refers to the ratio of the total impacts to the direct impacts for employment or earnings.

**GROSS DOMESTIC PRODUCT**

An estimate of the Gross Domestic Product (GDP) of the Arizona travel industry based on the RTIM direct travel impacts is also provided in this report. The GDP of an industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always less than output or sales because GDP measures only the "value" added of an industry and does not include the cost of the inputs that are also necessary to produce a good or service. GDP is a useful concept because it permits comparisons of the economic contributions of different industries. The relationship between spending and gross domestic product is illustrated in the figure below. Examples of inputs are the food or accounting services that restaurants purchase from suppliers. "Goods resold" are the commodities that retail establishments purchase from manufacturers or wholesale trade businesses and resell with a markup. These inputs or goods are not counted as the GDP of the restaurant or retail industry because their value was created in other industries (agriculture, accounting, manufacturing).

**Relationship Between Spending and Gross Domestic Product**



It is for this reason that "travel spending" - as measured from surveys of visitors - is not the best measure of the travel industry's real economic contribution. This is because some visitor spending is actually counted as the GDP of other industries (e.g., agriculture, accounting, manufacturing). Furthermore, these other industries may or may not be located within the geographic area of interest. If the farm were located within the region of interest, then the GDP of the local farm

would be included as an indirect or secondary effect. If no (e.g., a manufacturing firm in another state or country), then that portion of GDP is not counted. The preceding graph also shows the three main components of GDP. For most industries, labor income (essentially equivalent to earnings in this report) is the primary component of GDP. This is true of the travel industry. A second component is the tax payments that businesses make to government, such as sales, excise and property taxes. In the case of excise taxes, businesses are essentially a collection agency for the government. The final component, operating surplus, represents the income and payments (e.g., dividends, interest) to other stakeholders of the firm. The concept of GDP also illustrates that with small geographic units of analysis (e.g., counties), earnings, employment, and tax revenues are the best measures of the economic value of the travel industry to the local economy. Small area measures of GDP are less reliable and much of the operating surplus may leak out of the local economy anyway. Indirect effects are also generally less in smaller economies.

### **INTERPRETATION OF IMPACT ESTIMATES**

Users of this report should be aware of several issues regarding the interpretation of the impact estimates contained herein:

- The estimates contained in this report are based on the most current data available and supersede all previous estimates of travel impacts.
- The estimates in this report are expressed in *current* dollars unless otherwise noted.
- The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.
- In general, estimates of small geographic areas (e.g., rural counties) are less reliable than estimates for regions or metropolitan counties. Trend analysis and comparisons of counties with relatively low levels of travel related economic activity should therefore be interpreted cautiously.
- The estimates of travel impacts published in this report will necessarily differ somewhat from estimates generated from different models, methodologies and data sources. Nonetheless, it should be emphasized that all credible estimates of direct travel impacts at the state level, including those of Dean Runyan Associates, are of similar magnitude.

**DEFINITION OF TERMS**

**Commodity:** A classification of a product or service, such as lodging or food service. An establishment or industry may produce more than one commodity.

**Direct Impacts:** Employment, earnings and tax receipts *directly* generated by travel spending, as distinguished from secondary and total impacts.

**Earnings:** Earnings include wage and salary disbursements, other earned income or benefits, and proprietor income. Only the earnings attributable to travel expenditures are included.

**Employment:** Industry employment (jobs) associated with travel-generated *earnings*. Includes both full-time and part-time positions, and salaried or self-employed individuals. Employment is reported as an average for a time period, typically annual. (Unless otherwise noted, the employment estimates refer to establishment or industry employment at place of work, not the employment status or residence of the individual.)

**Federal Taxes:** Federal taxes include the motor fuel excise tax, airline ticket taxes, and personal income and payroll taxes.

**Industry:** A classification of business or government establishments based on their primary technological process. (See NAICS Appendix table.)

**Local Taxes:** Lodging taxes imposed by cities, counties and other regional tax jurisdictions in Arizona. These taxes are levied on sales to visitors and the spending of employees attributable to travel industry earnings. Passenger Facility Charges attributable to visitors (a fee imposed on airline tickets) are included in counties with airports. Property tax payments attributable to travel industry businesses and employees are also included.

**Other spending:** Other spending includes spending by residents on ground and air transportation for travel to other destinations, spending on travel arrangement services, and convention/ trade shows.

**Private Home:** Unpaid overnight accommodations of friends and relatives.

**Receipts:** Travel expenditures less the sales and excise taxes paid by the consumer.

**State Taxes:** Lodging taxes, motor fuel, and business and personal income taxes imposed by the state of Arizona. These taxes are levied on sales to visitors and the spending of employees attributable to travel industry earnings.

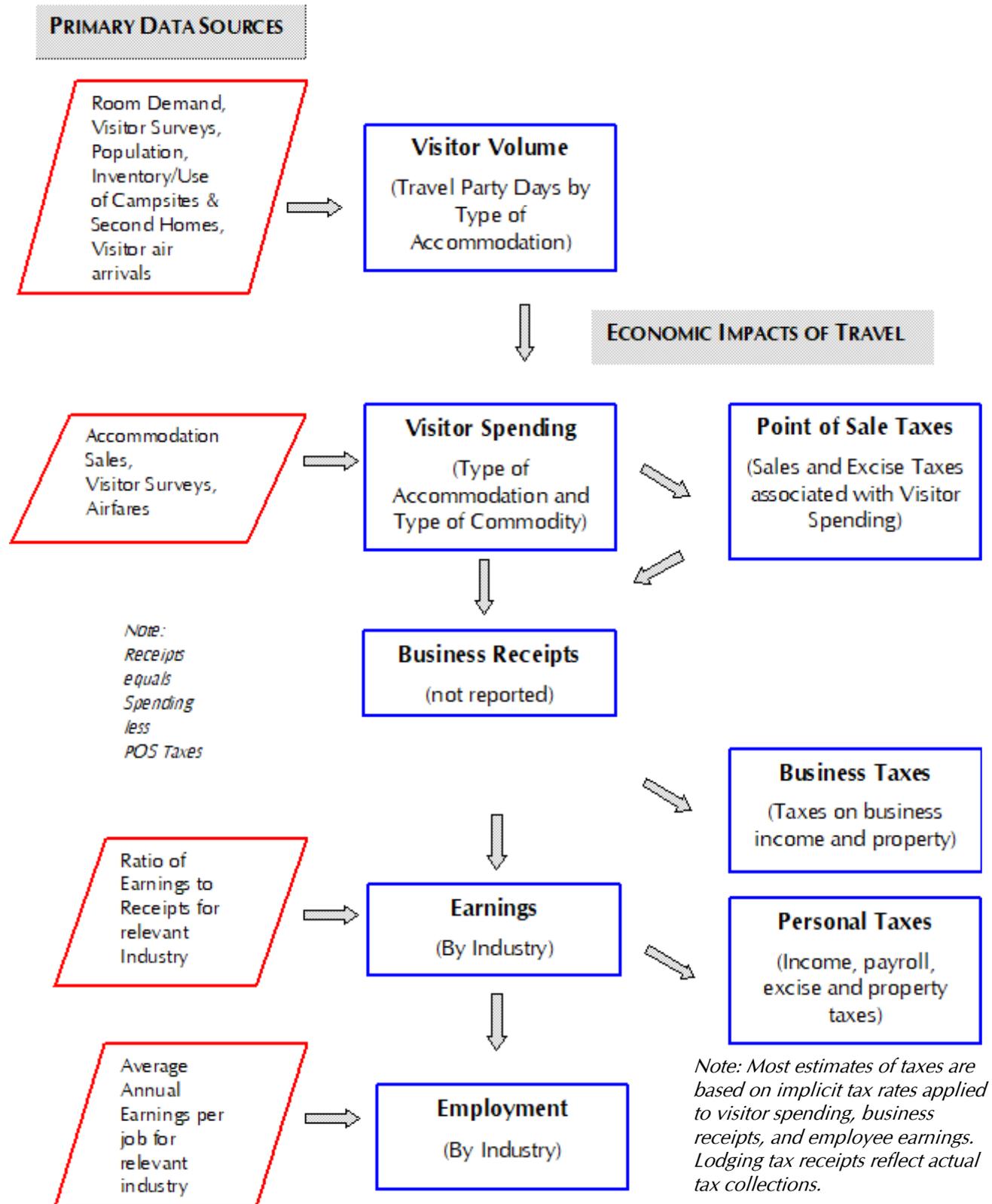
**STVR:** Acronym for Short Term Vacation Rentals. STVR includes lodging using "shared economy" services.

**Total Impacts:** The sum of *Direct* and *Secondary* impacts.

**Travel spending:** The sum of visitor and other spending related to travel.

**Visitor spending:** All spending on goods & services by visitors at the destination. Also referred to as destination spending.

REGIONAL TRAVEL IMPACT MODEL



## **TRAVEL INDUSTRY ACCOUNTS: A COMPARISON OF THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS**

An economic account is a method for displaying inter-related information about a set of economic activities. A travel industry account is a method to report different types of related information about the purchase of goods and services by visitors. The Bureau of Economic Analysis (BEA), which now provides annual and quarterly estimates of travel and tourism at the national level, describes a Travel and Tourism Satellite Account (TTSA) as “present(ing) a rearrangement of information from the National Income and Product Accounts, from the industry accounts, and from other sources so that travel and tourism activities can be analyzed more completely than is possible in the structure of the traditional national economic accounts.”<sup>[1]</sup> Similarly, the RTIM has been developed by Dean Runyan Associates to estimate travel spending, earnings, employment, and tax receipts at the state, county, and regional levels. These initial findings can, in turn, be used as input data for deriving estimates of other economic measures, such as value-added and indirect effects.

This appendix provides an overview of the Regional Travel Impact Model (RTIM) and travel and tourism satellite accounts (TTsAs). Although there is no single or absolute form of a TTSA, the one developed by the Bureau of Economic Analysis (BEA) will be the basis of the analysis here. The definitions, framework, and estimating methods used for the U.S. BEA TTSA follow, as closely as is practicable, the guidelines for similar travel satellite accounts that were developed by the World Tourism Organization (WTO) and the Organization for Economic Co-operation and Development (OECD).

The primary focus is on the direct impacts of visitor spending. Visitors are defined as persons that stay overnight away from home, or travel more than fifty miles one-way on a non-routine trip. Only the expenditures related to specific trips are counted as visitor spending. Other travel related expenditures such as the consumption of durable goods (e.g., recreational vehicles or sporting equipment) or the purchase of vacation homes are not considered.

While such a definition of the travel industry (i.e., the trip related expenditures of visitors) is conservative, it is also in keeping with the notion of the travel industry as being an export-oriented industry for specific local communities. That is, visitors are important to regions because they inject money into the local economy. This focus on the export-oriented nature of the travel industry for local communities becomes blurred if the industry is defined so as to include non-trip related expenditures.

[1] Peter D. Kuhbach, Mark A. Planting, and Erich H. Strassner, “U.S. Travel and Tourism Satellite Accounts for 1998-2003,” *Survey of Current Business* 84 (September 2004): 43-59.

## PRIMARY CONCEPTS, CATEGORIES & DATA REQUIREMENTS

There are three primary types of information that are measured and/or estimated in a travel industry account. The first is a measure of the **travel industry** in terms of both the characteristics of the business firms that sell travel goods and services and the characteristics of consumers that purchase travel industry goods and services. The second is a measure of the **demand segments** that consume travel industry goods and services. For example, the distinction between business and leisure travel is a measure of demand segments. The third is a measure of the **components of economic output** associated with the travel industry. The employee earnings generated by visitor spending is one such component. Travel-generated tax receipts are another. These three categories of information represent different aspects of the accounting ledger - they represent different ways of viewing or analyzing the travel industry.

The bulk of this paper will discuss these three types of information in terms of their conceptual foundations, the data requirements, and some of the more salient issues that users of this information should be aware of. There will also be some discussion of **indirect and induced effects** in that these effects can be reasonably estimated from the direct travel industry accounts. These secondary (versus direct) effects describe the relationship of the travel industry to other sectors of the larger economy.

The intent of this discussion will be to provide a general overview of the process of constructing travel industry accounts and the underlying similarity between the RTIM and a TTSA. More technical issues are generally placed in footnotes.

### TRAVEL INDUSTRY

Defining the travel industry is probably the most critical and data intensive effort involved in developing a travel industry account. It is an exercise in matching supply (sellers of goods and services) with demand (the travelers that purchase those particular goods and services). It is complicated by the fact that no single industrial classification scheme provides a valid measure of the travel industry.[2] There are only three significant industrial classifications (Accommodations [NAICS 721], Scheduled Passenger Air Transportation [NAICS 481111] and Travel Arrangement and Reservation Services [NAICS 5615]) that *primarily* sell travel industry goods and services.[3] Firms in other industries (retail, recreation, transportation) provide goods and services to both travelers and other types of consumers.

Because of this, most satellite accounts, as well as the RTIM, incorporate at least some information about the expenditures of visitors in order to define the supply of visitor industry

[2]The North American Industrial Classification System (NAICS) is the current standard in the United States.

[3]Even these industries are not purely travel. For example, the accommodations industry provides services to local residents (food service and meeting rooms). Passenger airlines also ship cargo on the same planes that carry passengers. Fortunately, it is usually possible to make adjustments for these non-travel components through the use of additional data.

firms. For example, if there is an estimate of visitor-days and an estimate of how much the average visitor spends on food services per day, then an estimate of visitor spending on food services can be calculated. In most cases, this will be only a fraction of all food service sales in that residents are a larger market for most restaurants.[4] The industry sectors that are usually matched to visitor spending in this way are: accommodations (NAICS 721), food service (722), arts, entertainment and recreation (71), and retail trade (44-45). A portion of transportation business is also part of the travel industry for obvious reasons.

In the case of the transportation sector, the definition and measurement of the travel industry component is more complicated because most transportation spending by visitors involves travel to and from the destination, rather than travel at or within the destination market. This is not an issue if the geographic scope of the travel industry market includes the origin and destination of travel. National travel industry accounts thus include all domestic passenger air transportation in the travel industry. The issue is more complicated at the state or regional level, however.

Suppose, for example, that the focus of a travel industry account is the state of Arizona. How should the purchase of a round trip airline ticket by a Chicago resident traveling to Phoenix be treated in that only some of the economic impact of this spending will occur in Arizona? A reasonable approach would be to allocate only a portion of this spending (and related payroll, taxes, etc.) to Arizona and ignore the remainder for the purpose of creating a travel industry account for Arizona. However, if this procedure were followed for every state, the sum of the state accounts would be less than the national travel account. The state accounts would be additive if outbound air travel from each state were included. However, this is methodologically inconsistent with the construction of a national account, which does not include outbound travel as a component of domestic tourism demand. The approach used in the RTIM is to make a distinction between the *visitor industry*, that includes only visitor demand, and the *travel industry*, which includes visitor demand and that portion of outbound travel that can be attributed to the resident economy. For example, the passenger air transportation employment in Arizona can be divided between three groups of travelers: inbound, outbound, and pass-through. Only that employment attributable to inbound travel is part of the Arizona *visitor industry*. Employment attributable to outbound and pass-through travelers is included with the larger *travel industry*. [5]

[4]The proportion can vary enormously among regions and localities, however. In many popular visitor destinations, the primary market for food service will be visitors. It should also be noted that even with reliable visitor survey data, there is still the issue of how to translate spending on food service *commodities* to the supply of food service by *industry*. As indicated in the footnote above, food service is also supplied by the accommodation industry.

[5]The same issue arises with travel agencies and reservation services (NAICS 5615). Most of these services are probably related to outbound travel and are treated as such in the RTIM.

The following two tables display the specific industries that are included in the travel industry for the BEA's national TTSA and the RTIM. Although not identical, the industries are equivalent with only a few exceptions.[6]

**Bureau of Economic Analysis Tourism Industries  
Distribution of Travel-Generated Compensation  
in United States, 2007**

<b>Accommodation &amp; Food Services</b>	<b>38.1%</b>
Traveler accommodations	21.5%
Food services and drinking places	16.6%
<b>Transportation</b>	<b>23.3%</b>
Air transportation	15.4%
Rail transportation	0.4%
Water transportation	1.2%
Interurban bus transportation	0.3%
Interurban charter bus transportation	0.2%
Urban transit systems & other tran.	1.7%
Taxi service	1.0%
Automotive equipment rental & leasing	2.0%
Automotive repair services	0.8%
Parking lots and garages	0.2%
Toll highways	0.1%
<b>Recreation</b>	<b>11.2%</b>
Scenic and sightseeing transportation	0.4%
Motion pictures and performing arts	1.1%
Spectator sports	2.3%
Participant sports	2.4%
Gambling	3.0%
All other recreation and entertainment	2.0%
<b>Retail &amp; Nondurable Goods Production</b>	<b>16.2%</b>
Petroleum refineries	0.6%
Industries producing nondurable PCE commodities, excluding petroleum refineries	4.4%
Wholesale trade & tran. services	4.2%
Gasoline service stations	1.3%
Retail trade services, excluding gasoline service stations	5.8%
<b>Travel Arrangement</b>	<b>7.3%</b>
<b>All other industries</b>	<b>2.2%</b>
<b>Total Tourism Compensation</b>	<b>100.0%</b>

Source: Adapted from Eric S. Griffith and Steven L. Zemanek, "U.S. Travel and Tourism Satellite Accounts for 2005-2008," Survey of Current Business (June 2009): 37, table 6.

[6]The major exception is that the BEA includes the production of consumer non-durables that are sold through retail outlets. This is not a major component and would be even less so at the level of the state.

## RTIM Travel Impact Industries Matched to NAICS

<b>Travel Impact Industry</b>	<b>NAICS Industry (code)</b>
<b>Accommodation &amp; Food Services</b>	Accommodation (721) Food Services and Drinking Places (722)
<b>Arts, Entertainment &amp; Recreation</b>	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487)
<b>Retail</b>	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
<b>Ground Transportation</b>	Interurban and rural bus transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
<b>Air Transportation</b>	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
<b>Administrative/Support Services</b>	Travel Arrangement and Reservation Services (5615) Convention and Trade Show Organizers (56192)

Source: Dean Runyan Associates

## DEMAND SEGMENTS

The distinction between inbound and outbound travel has already been discussed in the previous section and in terms of the concepts of the *visitor industry* and the *travel industry*. Three other types of demand segments that are related exclusively to the *visitor industry* will be discussed here. The first two demand categories are reported by the BEA in their national TTSA. They are: ***leisure versus business travel***, and ***resident versus non-resident travel***. The third demand category is typically reported in the RTIM: ***type of traveler accommodation***. These three demand categories will be discussed in turn.

The distinction between ***leisure versus business travel*** is useful for several reasons. Economists like to distinguish between personal consumption expenditures on the one hand and business expenditures on the other. Indeed, this distinction is central for the National Income and Product Accounts (NIPAs). Those in the travel industry are more likely to be interested in this distinction because leisure travelers represent a more “marketable” segment because their travel choices are less determined by economic and business factors. Furthermore, business and leisure travelers tend to have different spending profiles. The availability of this information in either a state or regional TTSA or RTIM is essentially dependent on the availability of survey data (as it is at the national level). It should be noted, however, that such estimates are considerably less reliable for smaller geographic areas because of the limitations of survey data. Even at the state level, year-to-year changes in the composition of this demand segment should be interpreted in conjunction with other data.

The distinction between ***resident versus non-resident travel*** is fundamental to a national TTSA because it mirrors the distinction between the domestic economy and international transactions. Non-resident travel in the United States is considered an export in the official international transaction accounts.[7] The distinction is obviously also important because it is based on different political, legal, and currency regimes - factors that in themselves influence travel behavior. At the level of the state or region, the distinction between resident and nonresident travel is less important, although it is often reported.[8] There are at least two reasons why this distinction is less useful at state and regional levels.

First, there is considerably less of an economic rationale for distinguishing resident and non-resident travel at the level of the state, or any other political jurisdiction within the United States, than there is at the national level. States do not maintain interstate trade balance sheets that chart the flow of goods and services across state boundaries. From an economic point of view, the administration of the tax system is the primary, if only, reason for this distinction. In the case of travel and tourism, the evaluation of the tax impacts of resident versus nonresident travel might also be important.[9]

[7]Conversely, the spending of U.S. visitors in other countries is treated as an import in the international transaction accounts.

[8]The issues discussed with regard to the reliability of survey data for leisure versus business travel also applies to this category

[9]Nonresident visitors who pay taxes in their destination state represent an unambiguous gain for the state. This effect is less clear for resident travelers within the state.

Second, travel is behaviorally defined by length of distance from home (usually at least 50 miles one-way), trip purpose (non-routine), and/or the use of an overnight accommodation away from home. Rarely is domestic travel defined by virtue of crossing a geographic boundary.[10] The operators of tourist attractions in local communities are generally less interested in the origin of visitors than in the revenue that they generate for their businesses. In terms of the economic impacts at the *local* level, the distinction between in-state residents, out-of-state residents and international visitors may not be relevant other than for the purpose of marketing. However, other geographic characteristics of the visitor (e.g., distance traveled, the specific area of origin) are generally more useful measures of the visitor market than whether the visitor is a resident or nonresident.

Finally, the distinction among different **types of traveler accommodations** is generally reported in the RTIM. Typically, these categories are:

- Visitors who stay in hotels, motels, B&Bs., and similar lodging facilities
- Visitors who stay at campsites
- Visitors who stay in the private homes of friends or relatives
- Visitors who stay in vacation or second homes
- Visitors who do not stay in overnight accommodations on their trip away from home (day visitors).

These distinctions can be useful because estimates of economic impacts are often used for different purposes. The total of all accommodation types, of course, is an estimate of the total magnitude of the visitor industry. Visitors who stay in commercial lodging such as hotels and motels are most likely to have the greatest economic impact on a person-day basis. These visitors are also more likely to be influenced by marketing efforts. In urban areas, a large proportion will represent business travel. In other words, the type of accommodation category can be used in conjunction with other types of data to analyze the market characteristics of visitors.

[10]In essence, state level travel impact estimates really represent an aggregation of smaller geographic units, such as counties or regions. Populous states with large landmasses (e.g., California or Texas) will have a higher proportion of resident travel than small states (e.g., Rhode Island or Delaware).

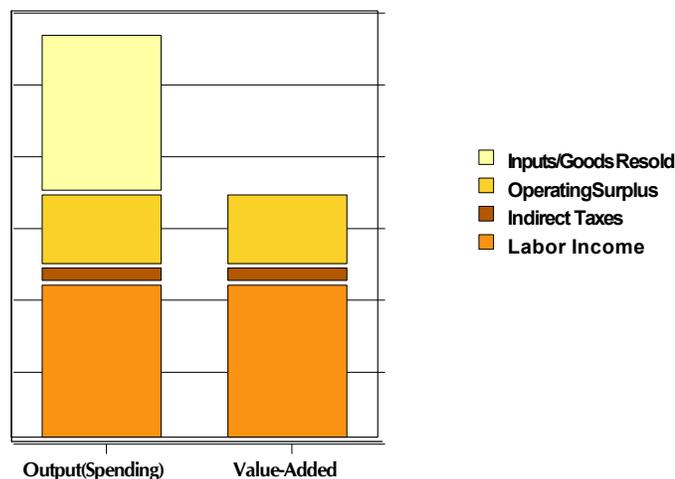
## COMPONENTS OF INDUSTRY OUTPUT

Because both the RTIM and the TTSA are empirically linked to NAICS industry accounts, it is possible to provide estimates of different components of economic output. The major economic components most often estimated are.[11]

- Travel spending (Gross Output)
- Value-added (Gross Product)
- Earnings (labor income)
- Indirect business taxes (sales, excise, property taxes & fees).

The relationship of these components is shown below. As indicated, the value-added of a particular industry (the bar on the right) is equal to gross output (travel spending) minus the intermediate inputs used by travel industry businesses to produce the good or service. Restaurants, for example, prepare and serve the food products that are purchased from suppliers. Airlines purchase or lease airplanes from other firms. These intermediate inputs are not counted as part of the value-added of the travel industry. They are counted as value-added in other industries (e.g., agriculture, aerospace manufacturing).

### Components of Industry Output



The distinction between gross output and value-added is probably even more important at the state or regional level. This is because the intermediate inputs that are purchased from other industries are even more likely to be purchased from businesses located in different regions or states. For example, the economic impact of air passenger travel in the state of

[11]There are some small differences between the BEA TTSA and the RTIM in what these components include. The BEA allocates proprietor income to Operating Surplus, the RTIM allocates it to Labor Income. The RTIM does not have an estimate of property taxes in indirect taxes. Overall, property taxes on businesses are a relatively small proportion of indirect taxes.

Hawaii should not include the purchase of airplanes manufactured in other parts of the world. Travel industry value-added is a more meaningful measure of the true economic impact of visitor spending in Hawaii because a portion of the economic impact of visitor spending in the state will actually occur elsewhere.[12] Value-added can also be viewed in terms of the distribution or payout of industry receipts, exclusive of those paid to other firms for intermediate inputs. Some of the receipts are distributed to labor as wages, benefits, and proprietor income. Some receipts are paid to government as indirect taxes. These taxes are called “indirect” because most of them are actually paid by consumers in the form of sales or excise taxes.[13] The remainder leaves gross operating surplus. Out of gross operating surplus various payments are made in the form of dividends, interest, and other payments, or retained by the firm. The sum of these three broad categories of payments is equal to travel industry value-added. To summarize:

Value-added = Spending *less* intermediate goods & services, or

Value-added = Labor Income *plus* indirect business taxes *plus* gross operating surplus.

The RTIM is similar to the TTSA in that it also provides estimates of these components of economic output. Travel spending, earnings, and tax impacts are generally provided at the state or regional level. Value-added is generally reported at the state-level only (sometimes referred to as Travel Industry Gross State Product). At the level of the state, travel industry value-added or GSP is an important measure – more economically meaningful than travel spending.[14] For smaller geographic areas, however, the rationale for reporting value-added is less clear. First, there are real data limitations and data costs in deriving these estimates. Second, ***the most important components of value added for the travel industry are earnings and tax receipts***. Because the travel industry is relatively labor intensive and because a large proportion of travel industry goods and services are subject to excise and sales taxes, these two components of value-added (labor income and indirect taxes) are relatively high for the travel industry. The local effects of gross operating surplus are generally less important and certainly much more difficult to assess than are earnings and tax impacts. The relevance of earnings and tax receipts is also in keeping the export-oriented emphasis of the travel industry: earnings and tax receipts are more likely to stay in the local economy than is operating surplus.

[12]It should also be noted the value of the intermediate inputs used by travel industry firms will not necessarily disappear if the travel industry stops buying them. Aerospace firms will shift their production to other users (e.g., military). Agriculture will seek new markets for their products.

[13]Other taxes included here are property taxes, business franchise taxes, and other fees. Income taxes are not included, because they are paid out of operating surplus.

[14]It is also possible to compare different industries with respect to their value-added. It is more difficult and less useful to compare industries on the basis of sales.

## INDIRECT, INDUCED AND SECONDARY EFFECTS

To this point, the discussion of travel industry accounts has referred only to the direct output components. That is, the ripple effects of the re-spending of travel industry receipts throughout the larger economy have not been analyzed. The structure of both the TTSA and the RTIM permit such analysis.

- **Indirect** effects refer to the intermediate inputs used to produce the final product or service, providing that those inputs are themselves produced within the designated geographic area.
- **Induced** effects refer to the purchase of goods and services by *employees* that are attributable to direct and indirect impacts. These induced impacts are derived from economic data that describe the purchasing patterns of households. For example, employees of all the designated export-oriented industries will spend their income on food, household durables, health care, and so on.
- The sum of indirect and induced impacts is sometimes referred to as the **secondary** effect. These secondary impacts may be as great or greater than the direct impact alone.
- The ratio of the total effects (direct plus either indirect, induced, or secondary) to the direct effects is the **multiplier**.

The BEA reports the **indirect** components of economic output. This is equivalent to domestic travel spending less the goods and services imported from abroad to meet domestic demand. For travel, these imports would include souvenirs manufactured in China and petroleum extracted in Saudi Arabia. The indirect output multiplier for 2002 was 1.76. The ratio of domestic travel spending to travel industry value-added was 1.88. The difference reflects the intermediate inputs for travel imported from abroad.

At the state level, these indirect output multipliers are typically lower because relatively more of the intermediate inputs are purchased from outside of the state. At the county or metropolitan level, the multipliers are generally even lower for the same reason. Furthermore, the estimates are usually less reliable because of the data limitations of the regional input-output model used to estimate the indirect effects.

The BEA does not report **induced** effects - the effect of household spending of the direct and indirect labor income. Typically, these induced effects will be larger than the indirect effects at the state or regional level, in part because they are based on both the direct and indirect components.<sup>15</sup> As with indirect effects, the induced effects will also tend to be lower for smaller economic areas and the reliability of the estimates will be less.

[15]The induced effects can be estimated with the Implan model maintained by the Minnesota Implan Group.

Secondary effects should be interpreted cautiously. These effects describe the relationship of economic transactions at a point in time. These relationships will not necessarily remain constant with a change in direct economic output. This is because all economic resources have alternative uses. Because of this, it is often difficult to determine the effect of an increase or decrease in visitor spending on the larger economic system over time.

### **THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS COMPARED**

This appendix has provided an overview of Dean Runyan Associates RTIM and the Bureau of Economic Analysis' domestic TTSA. These travel industry accounts are similar in terms of how they define the travel industry and the measures of the industry that are reported. The differences stem largely from their different levels of analysis - the BEA provides estimates at the national level only, while the RTIM's are typically constructed on a state or regional level. Because of this geographic focus, the RTIM provides a distinction between the visitor industry and the travel industry. The RTIM also provides measures of all of the components of economic output and secondary effects at the state or large region level. At smaller units of analysis, however, the emphasis is on earnings and tax receipts generated by travel spending as these are the most reliable and meaningful measures of the economic impact of travel at the local level.

## Arizona Earnings and Employment by Industry Sector, 2017

Industry Sector	Earnings (\$Billion)	Percent of Total	Employment (Thousand)	Percent of Total
<b>Primarily Export-Oriented</b>	<b>19.0</b>	<b>9.4%</b>	<b>252</b>	<b>6.8%</b>
Agriculture, Forestry, Fishing and related	2.4	1.2%	47	1.3%
Mining	1.5	0.7%	24	0.6%
Manufacturing	15.1	7.5%	181	4.8%
**Travel	7.0	3.4%	188	5.0%
<b>Primarily Non Export-Oriented</b>	<b>99.8</b>	<b>49.4%</b>	<b>1,924</b>	<b>51.6%</b>
Construction	12.4	6.1%	203	5.5%
Utilities	1.8	0.9%	14	0.4%
Wholesale trade	9.6	4.8%	109	2.9%
Retail trade	14.3	7.1%	399	10.7%
Real estate and rental and leasing	5.8	2.9%	213	5.7%
Management of companies and enterprises	3.5	1.7%	41	1.1%
Administrative and waste services	12.6	6.3%	304	8.2%
Other services, except public administration	7.3	3.6%	191	5.1%
Government and government enterprises	32.4	16.0%	449	12.0%
<b>Mixed</b>	<b>83.2</b>	<b>41.2%</b>	<b>1,552</b>	<b>41.6%</b>
Transportation and warehousing	6.9	3.4%	134	3.6%
Information	4.8	2.4%	57	1.5%
Finance and insurance	15.8	7.8%	250	6.7%
Professional and technical services	15.8	7.8%	237	6.3%
Educational services	3.3	1.6%	80	2.1%
Health care and social assistance	25.4	12.6%	417	11.2%
Leisure and Hospitality	11.3	5.6%	379	10.2%
<b>Arizona Total**</b>	<b>202.0</b>	<b>100.0%</b>	<b>3,728</b>	<b>100.0%</b>

\*\*Travel is not included in the sub and grand totals because it is also represented in other sectors (primarily leisure and hospitality, transportation, and retail trade).

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## Industry Groups

### Accommodation & Food Services

- Food services and drinking places
- Hotels and motels, including casino hotels
- Other accommodations

### Arts, Entertainment & Recreation

- Amusement parks, arcades, and gambling industries
- Bowling centers
- Fitness and recreational sports centers
- Independent artists, writers, and performers
- Museums, historical sites, zoos, and parks
- Other amusement and recreation industries
- Performing arts companies
- Promoters of performing arts and sports and agents for public figures
- Spectator sports companies

### Construction

- Construction of new nonresidential commercial and health care structures
- Construction of new nonresidential manufacturing structures
- Construction of new residential permanent site single- and multi-family structures
- Construction of other new nonresidential structures
- Construction of other new residential structures
- Maintenance and repair construction of nonresidential structures
- Maintenance and repair construction of residential structures

### Education and Health Services

- Child day care services
- Community food, housing, and other relief services, including rehabilitation services
- Home health care services
- Individual and family services
- Medical and diagnostic labs and outpatient and other ambulatory care services
- Nursing and residential care facilities
- Offices of physicians, dentists, and other health practitioners
- Other private educational services
- Private elementary and secondary schools
- Private hospitals
- Private junior colleges, colleges, universities, and professional schools

### Financial Activities

- Commercial and industrial machinery and equipment rental and leasing
- Funds, trusts, and other financial vehicles
- General and consumer goods rental except video tapes and discs
- Imputed rental activity for owner-occupied dwellings
- Insurance agencies, brokerages
- Insurance carriers
- Lessors of nonfinancial intangible assets
- Monetary authorities and depository credit intermediation activities
- Nondepository credit intermediation and related activities
- Real estate establishments
- Securities, commodity contracts, investments, and related activities
- Video tape and disc rental

## **Information**

- Book publishers
- Cable and other subscription programming
- Data processing, hosting, ISP, web search portals and related services
- Directory, mailing list, and other publishers
- Internet publishing and broadcasting
- Motion picture and video industries
- Newspaper publishers
- Other information services
- Periodical publishers
- Radio and television broadcasting
- Software publishers
- Sound recording industries
- Telecommunications

## **Manufacturing & Utilities**

(280 industries)

## **Natural Resources and Mining**

- All other crop farming
- Animal production, except cattle and poultry and eggs
- Cattle ranching and farming
- Commercial fishing
- Commercial hunting and trapping
- Commercial logging
- Cotton farming
- Dairy cattle and milk production
- Drilling oil and gas wells
- Extraction of oil and natural gas
- Forestry, forest products, and timber tract production
- Fruit farming
- Grain farming
- Greenhouse, nursery, and floriculture production
- Mining and quarrying other nonmetallic minerals
- Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals
- Mining and quarrying stone
- Mining coal
- Mining copper, nickel, lead, and zinc
- Mining gold, silver, and other metal ore
- Mining iron ore
- Oilseed farming
- Poultry and egg production
- Sugarcane and sugar beet farming
- Support activities for agriculture and forestry
- Support activities for oil and gas operations
- Support activities for other mining
- Tobacco farming
- Tree nut farming
- Vegetable and melon farming

**Other Services**

- Automotive repair and maintenance, except car washes
- Car washes
- Civic, social, professional, and similar organizations
- Commercial and industrial machinery and equipment repair and maintenance
- Death care services
- Dry-cleaning and laundry services
- Electronic and precision equipment repair and maintenance
- Grantmaking, giving, and social advocacy organizations
- Other personal services
- Personal and household goods repair and maintenance
- Personal care services
- Private household operations
- Religious organizations

**Professional and Business Services**

- Accounting, tax preparation, bookkeeping, and payroll services
- Advertising and related services
- All other miscellaneous professional, scientific, and technical services
- Architectural, engineering, and related services
- Business support services
- Computer systems design services
- Custom computer programming services
- Employment services
- Environmental and other technical consulting services
- Facilities support services
- Investigation and security services
- Legal services
- Management of companies and enterprises
- Management, scientific, and technical consulting services
- Office administrative services
- Other computer related services, including facilities management
- Other support services
- Photographic services
- Scientific research and development services
- Services to buildings and dwellings
- Specialized design services
- Travel arrangement and reservation services
- Veterinary services
- Waste management and remediation services

**Public Administration**

- Federal electric utilities
- Other Federal Government enterprises
- Other state and local government enterprises
- State and local government electric utilities
- State and local government passenger transit
- US Postal Service

**Trade**

- Retail Nonstores - Direct and electronic sales
- Retail Stores - Building material and garden supply
- Retail Stores - Clothing and clothing accessories
- Retail Stores - Electronics and appliances
- Retail Stores - Food and beverage
- Retail Stores - Furniture and home furnishings
- Retail Stores - Gasoline stations
- Retail Stores - General merchandise
- Retail Stores - Health and personal care
- Retail Stores - Miscellaneous
- Retail Stores - Motor vehicle and parts
- Retail Stores - Sporting goods, hobby, book and music
- Wholesale trade businesses

**Transport**

- Automotive equipment rental and leasing
- Couriers and messengers
- Scenic and sightseeing transportation and support activities for transportation
- Transit and ground passenger transportation
- Transport by air
- Transport by pipeline
- Transport by rail
- Transport by truck
- Transport by water
- Warehousing and storage