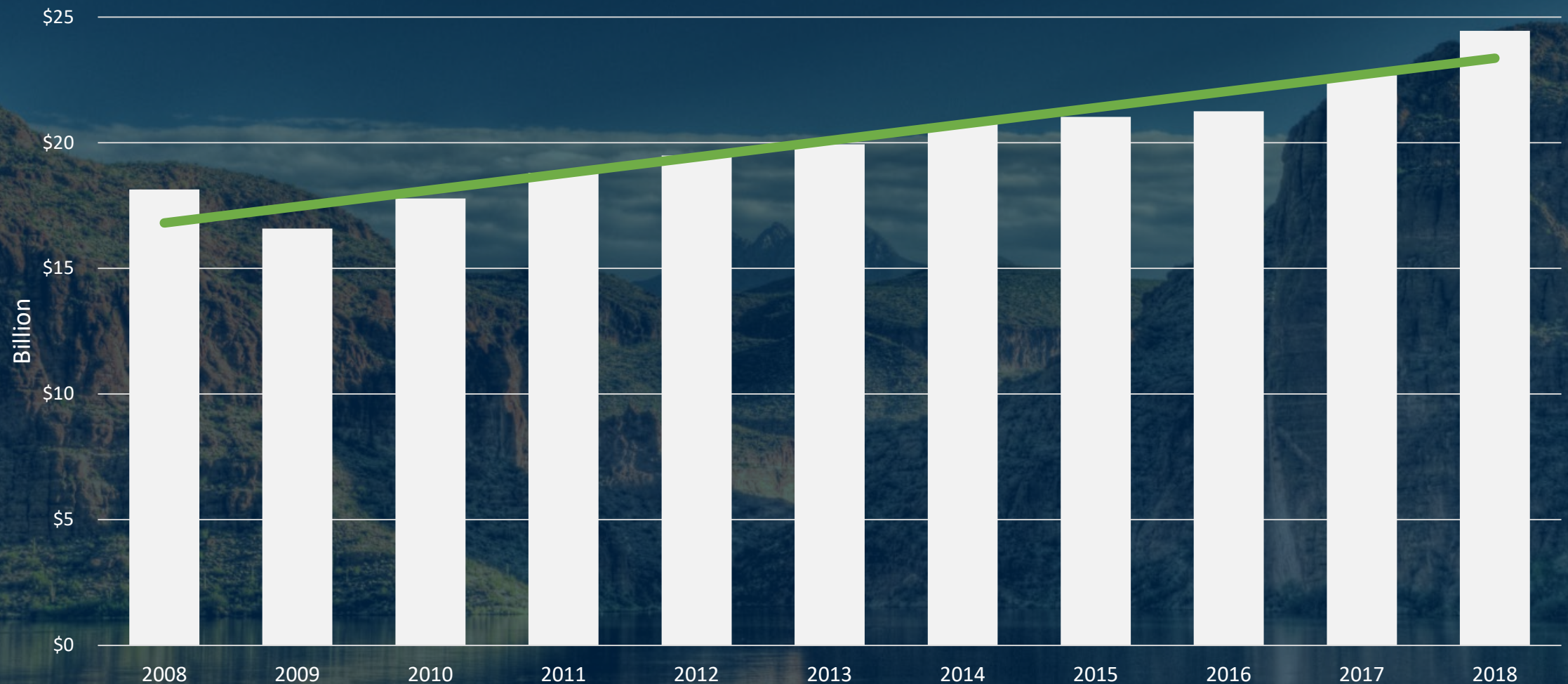


ARIZONA  
OFFICE OF TOURISM

# Industry Update 2019



# Direct Travel Spending



Source: Dean Runyan Associates, 2018p



DIRECT TRAVEL SPENDING  
GENERATED IN 2018



\$24  
BILLION



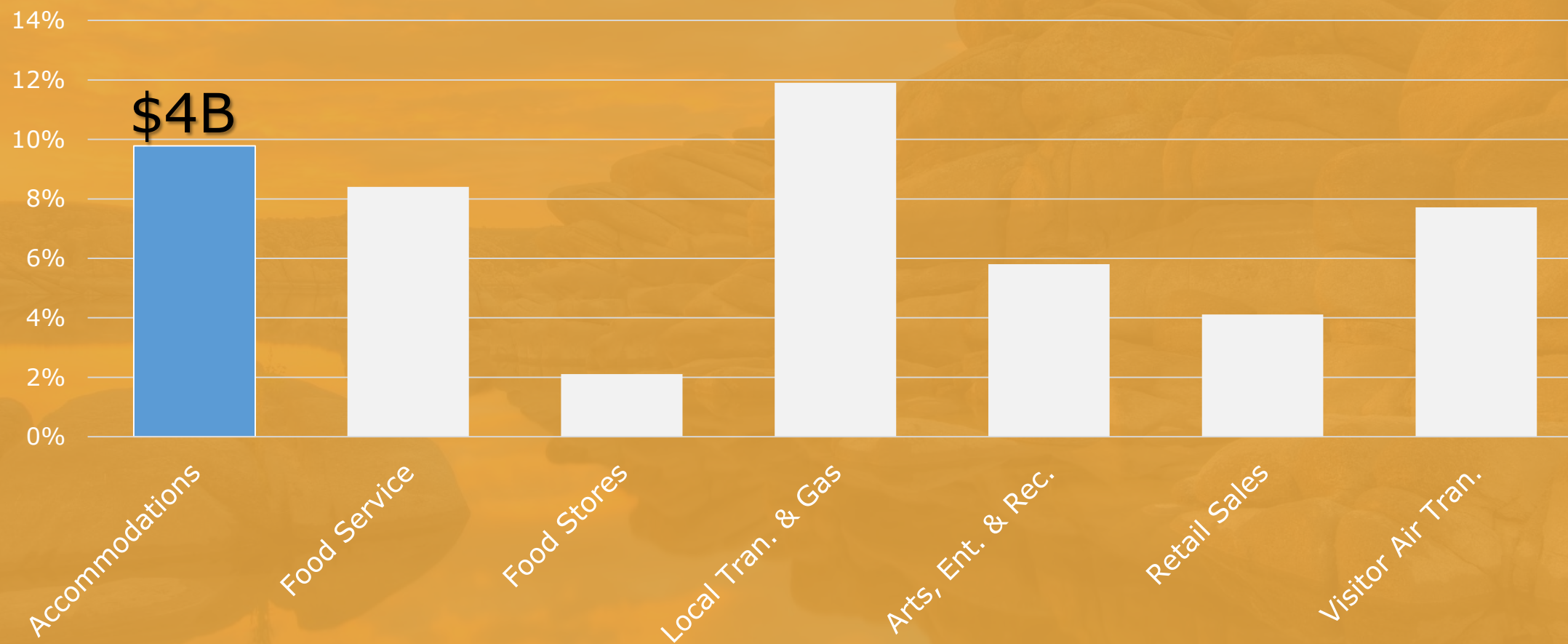


# Spending Breakdown



# Spending by Commodity Purchased

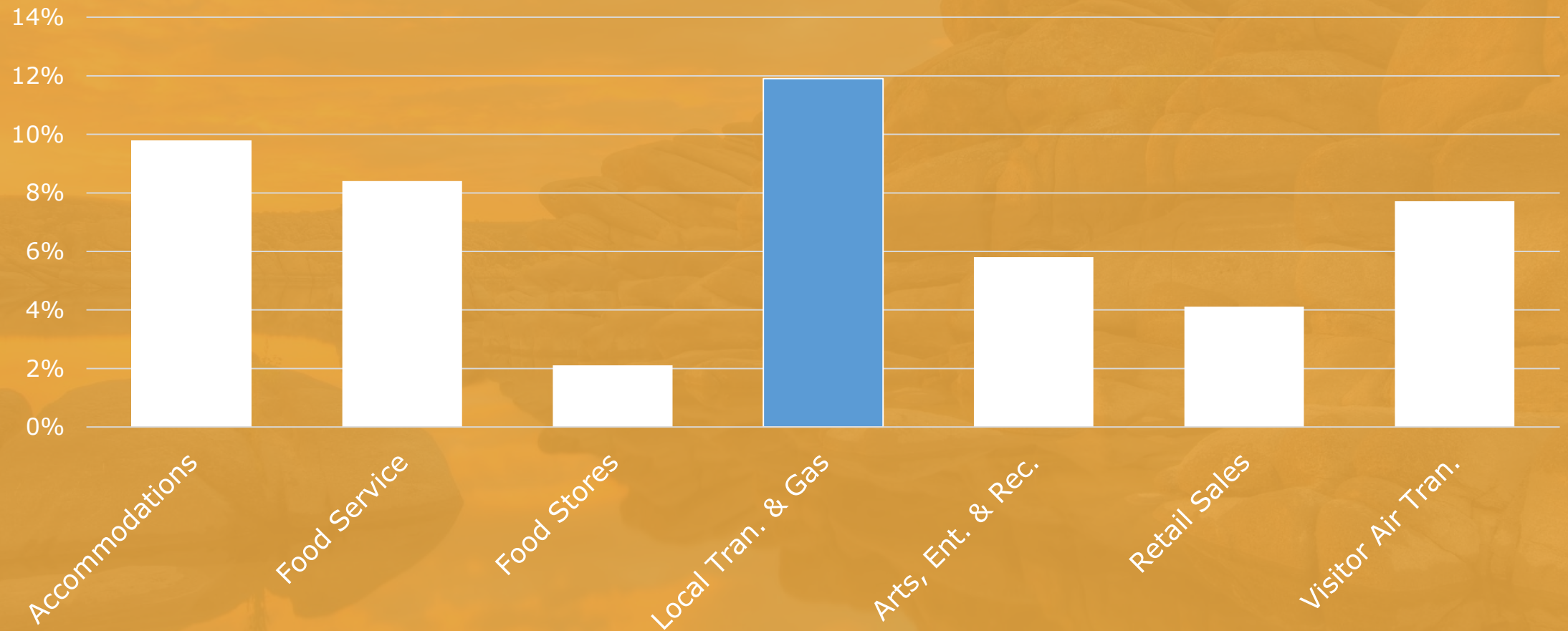
## YOY Growth





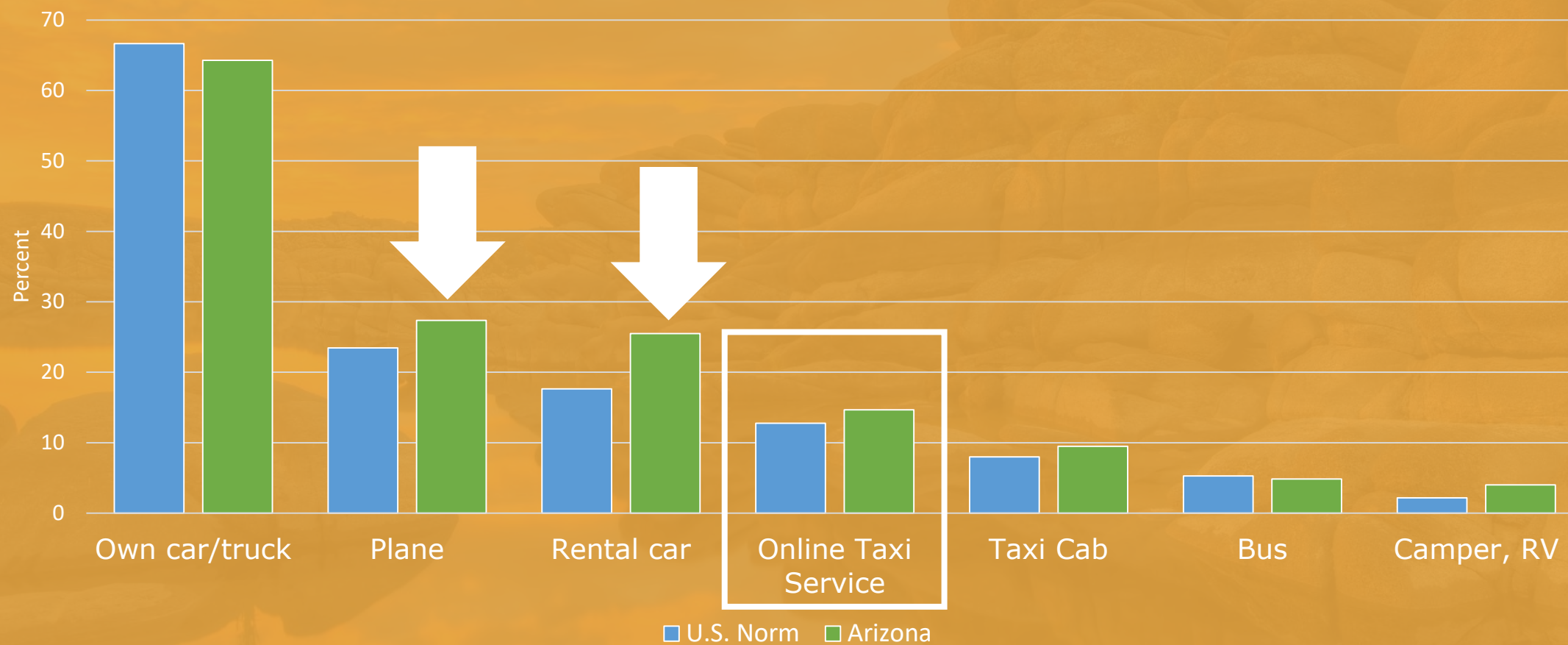
# Spending by Commodity Purchased

## YOY Growth





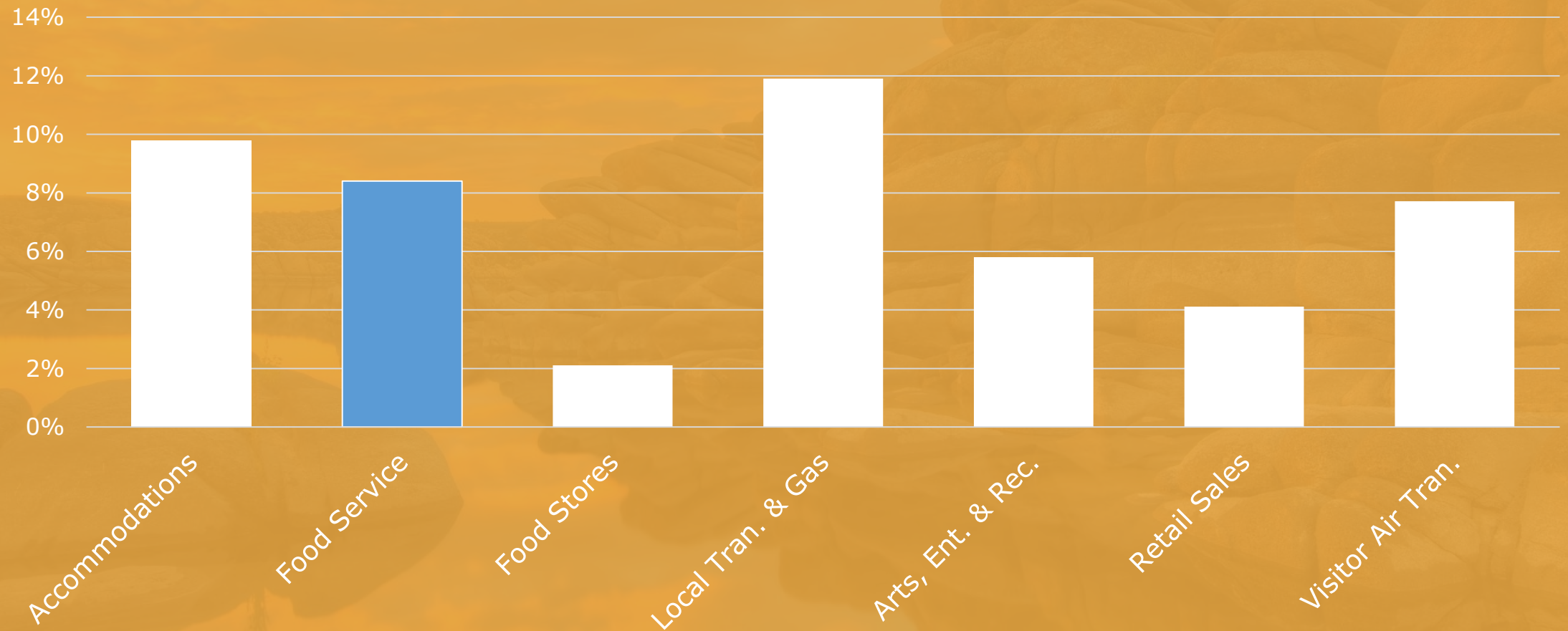
# Transportation





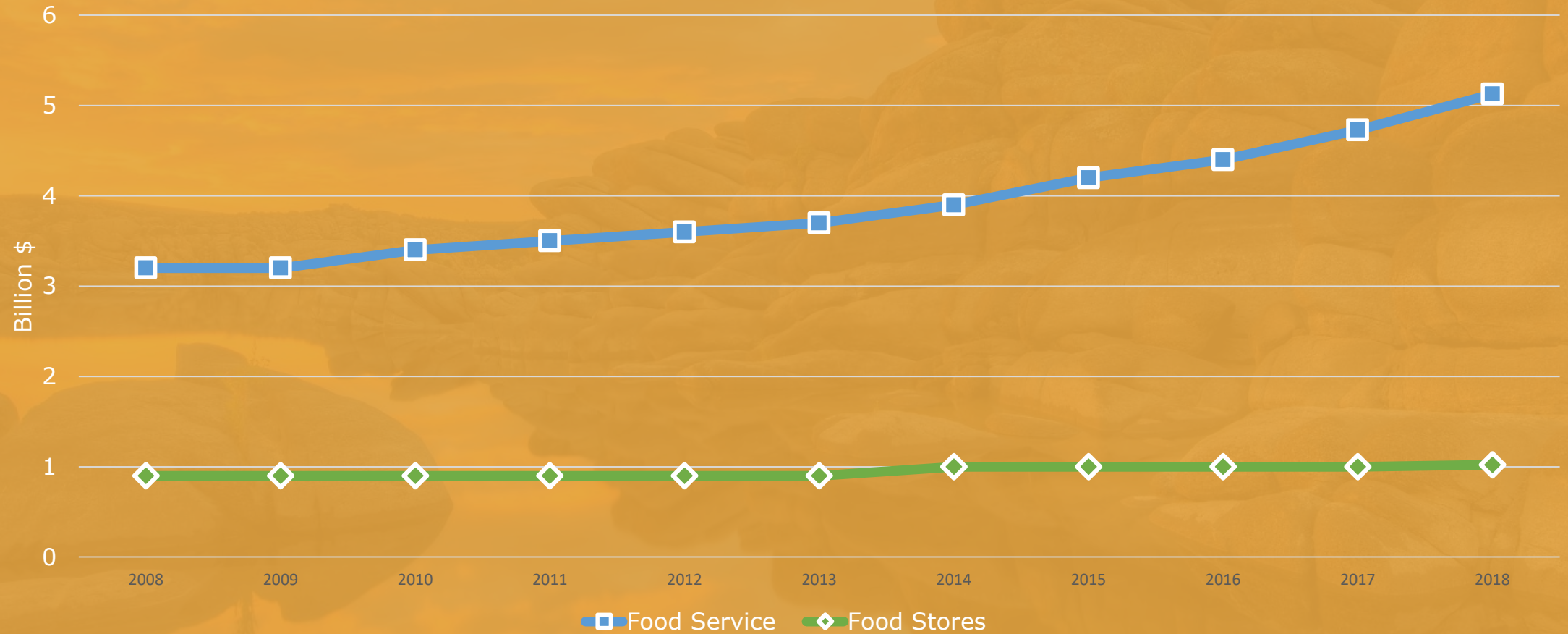
# Spending by Commodity Purchased

## YOY Growth



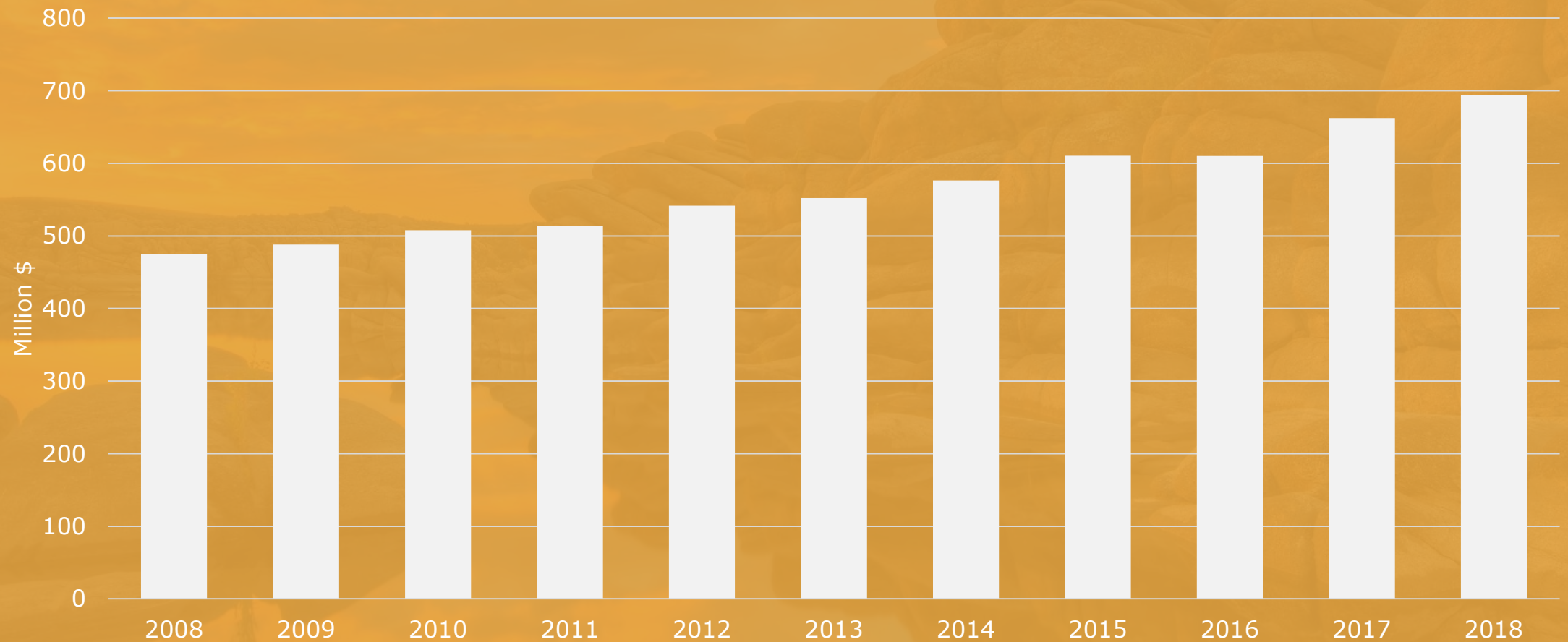


# Spending on Food Service





# Spending on Food Service – Pima County



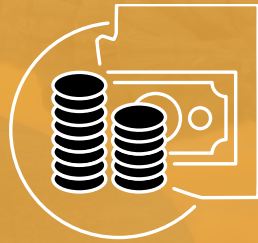




SPENDING



JOBS



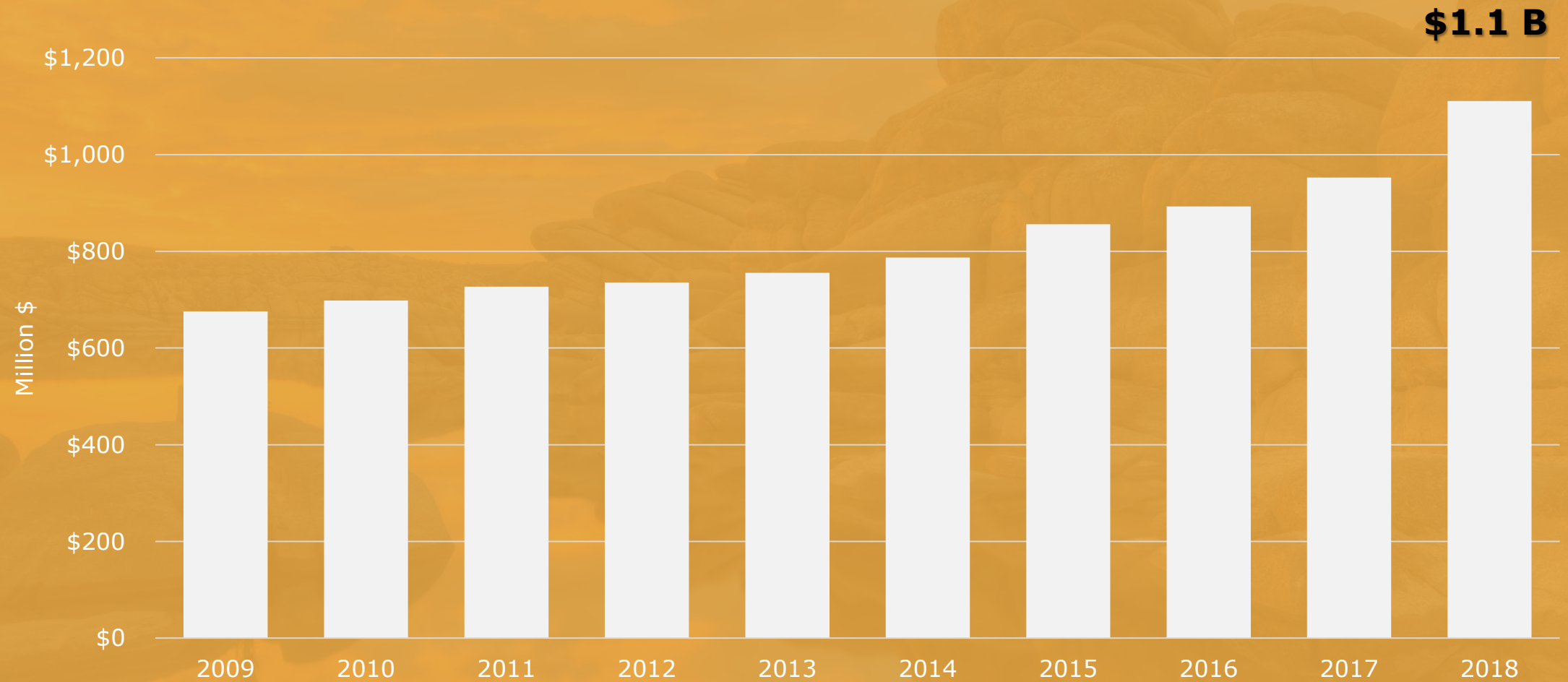
EARNINGS



TAXES



# Local Taxes



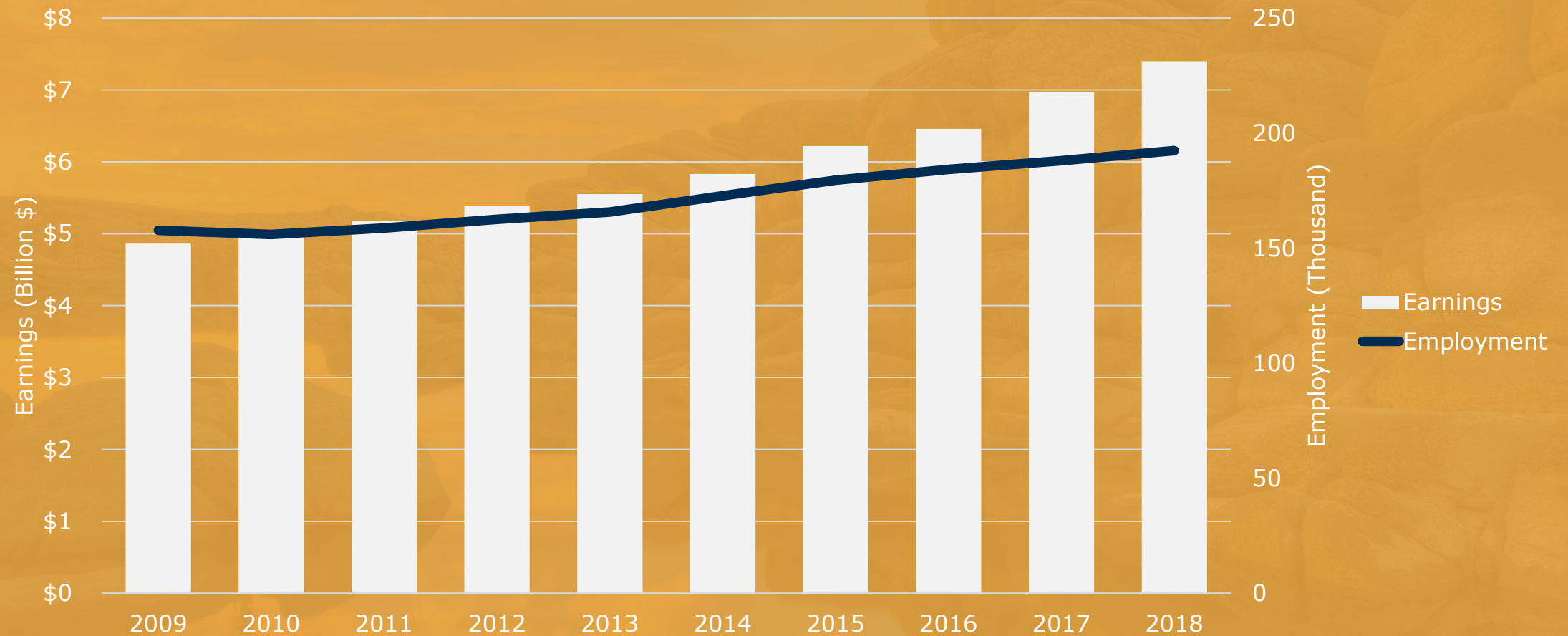
Source: Dean Runyan Associates, 2018p



# Tax Revenue per Household

Apache	\$440	Greenlee	\$250	Pima	\$510
Cochise	\$590	La Paz	\$1,420	Pinal	\$420
Coconino	\$2,970	Maricopa	\$850	Santa Cruz	\$1,140
Gila	\$1,060	Mohave	\$630	Yavapai	\$880
Graham	\$500	Navajo	\$860	Yuma	\$750

# Earnings and Employment







OVERNIGHT VISITS IN 2018



45.4  
MILLION

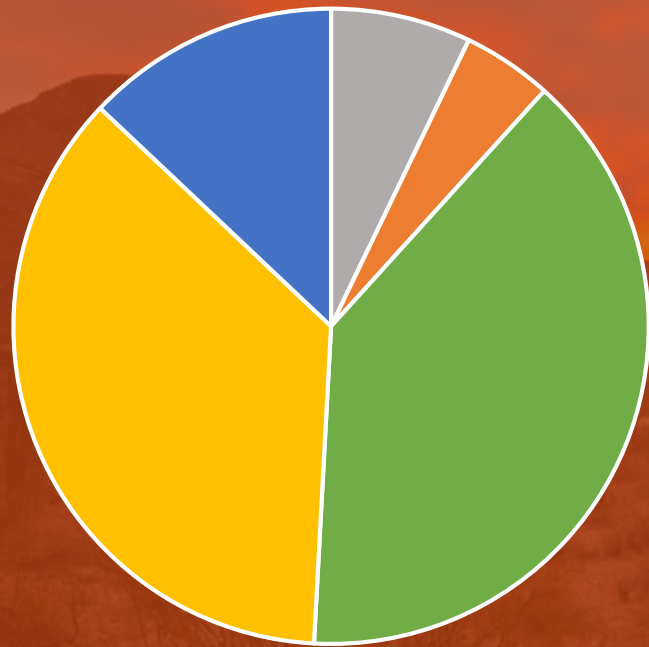


# Marketing to Arizona Visitors



# Who spends the most in your destination?

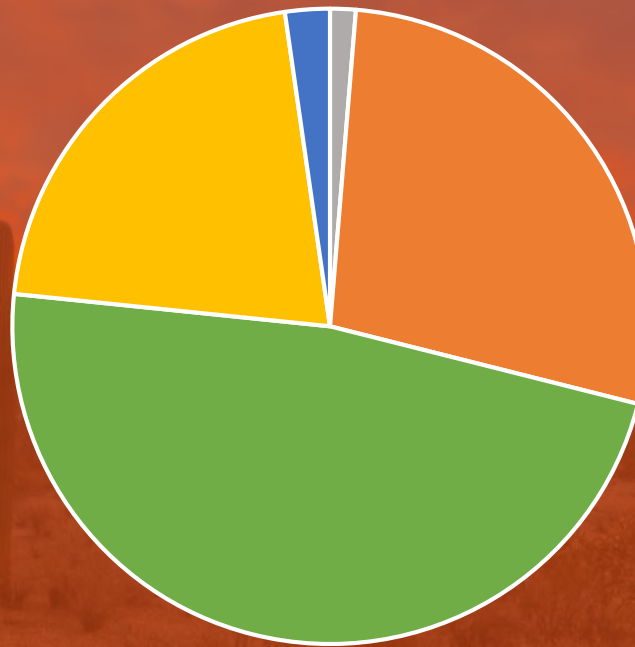
Apache



Vacation Home

Campground

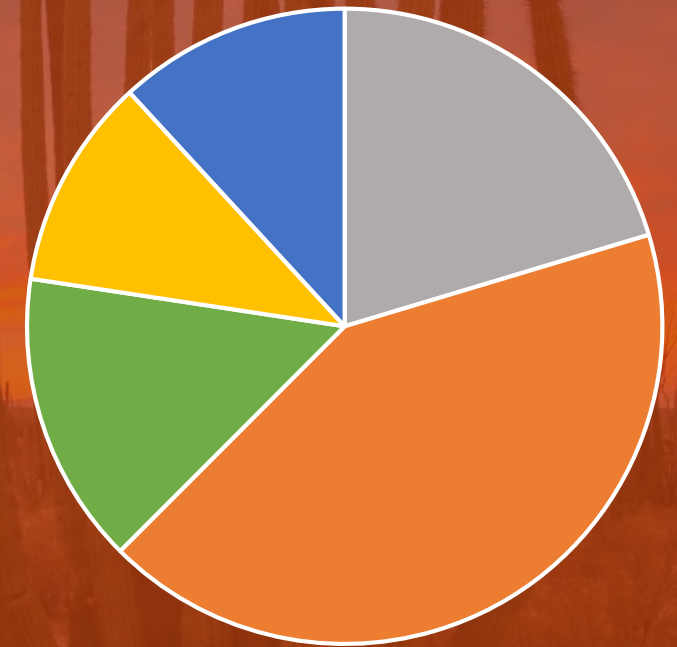
Pima



Day Traveler

Hotel, Motel, STVR

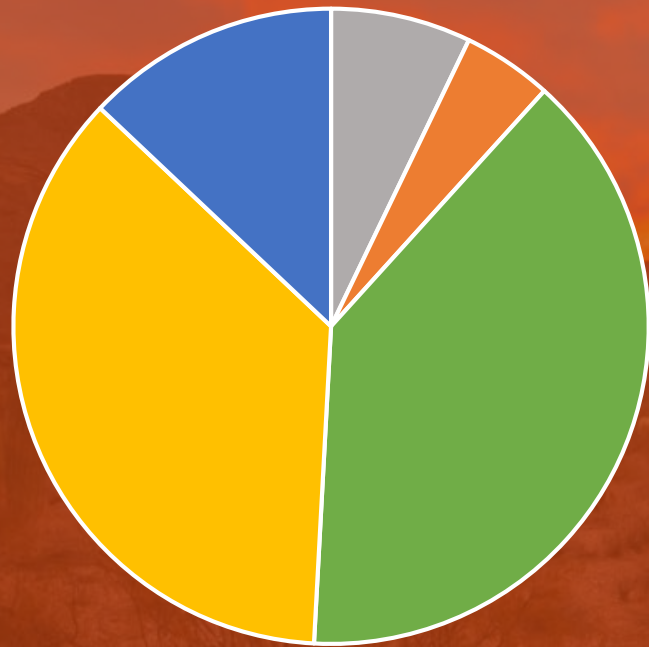
La Paz



Private Home

# Who spends the most in your destination?

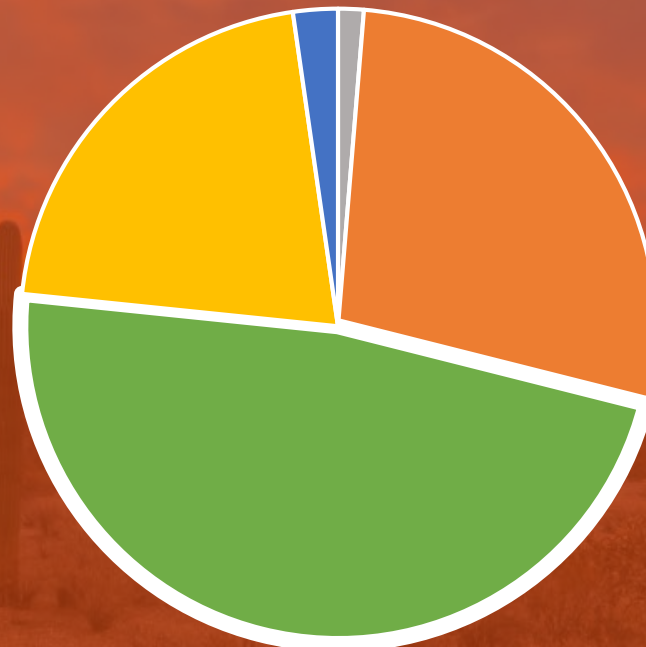
Apache



Vacation Home

Campground

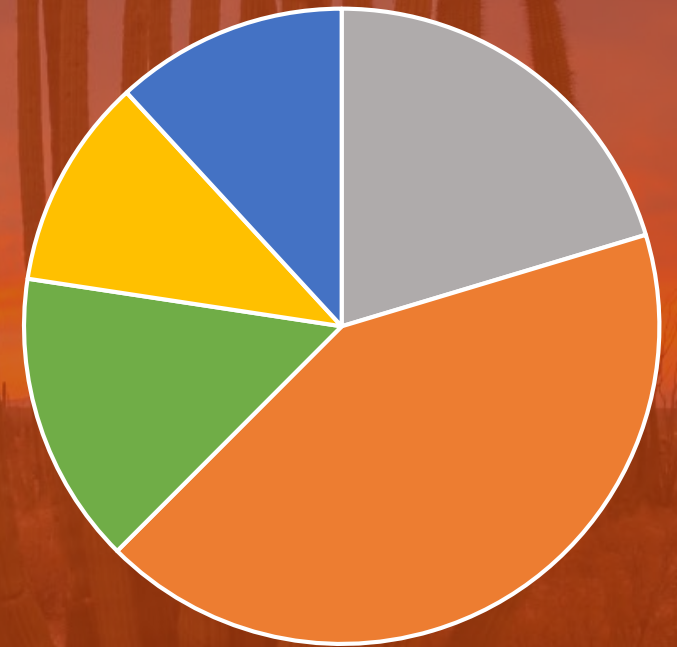
Pima



Day Traveler

Hotel, Motel, STVR

La Paz

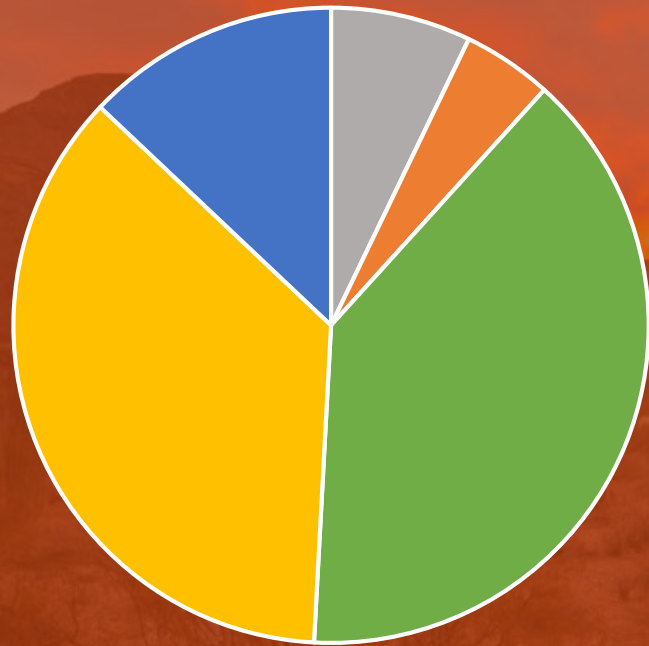


Private Home



# Who spends the most in your destination?

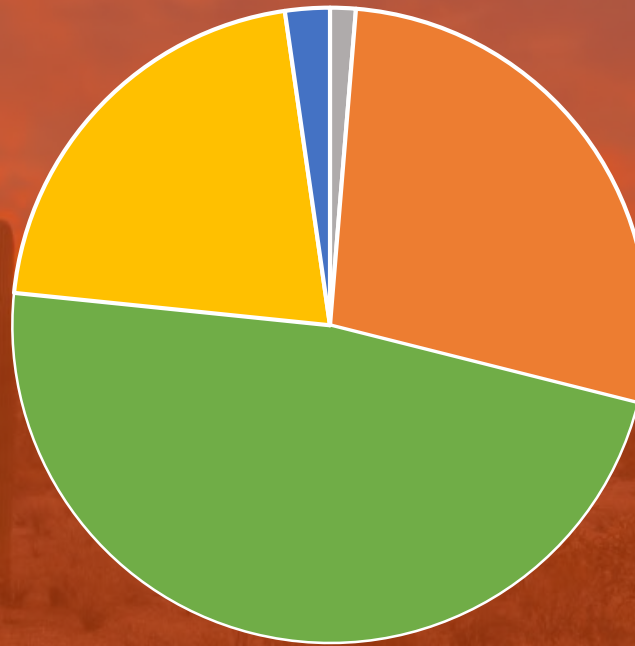
Apache



Vacation Home

Campground

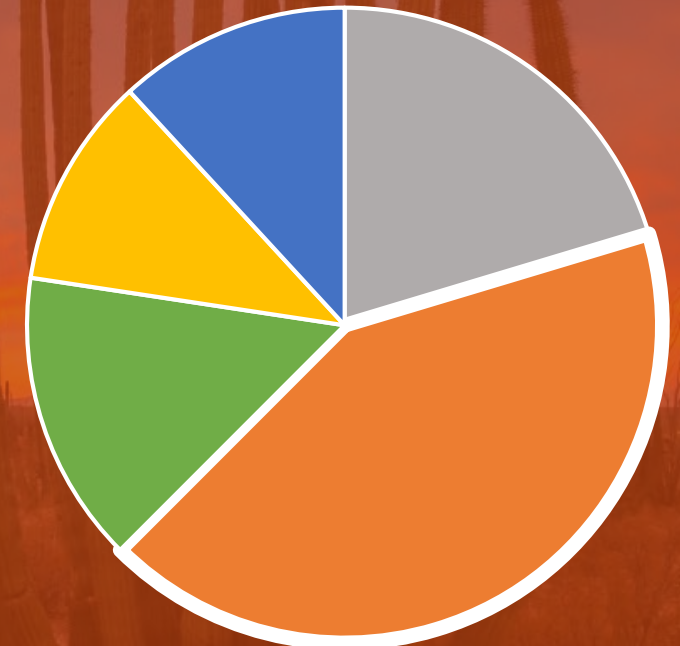
Pima



Day Traveler

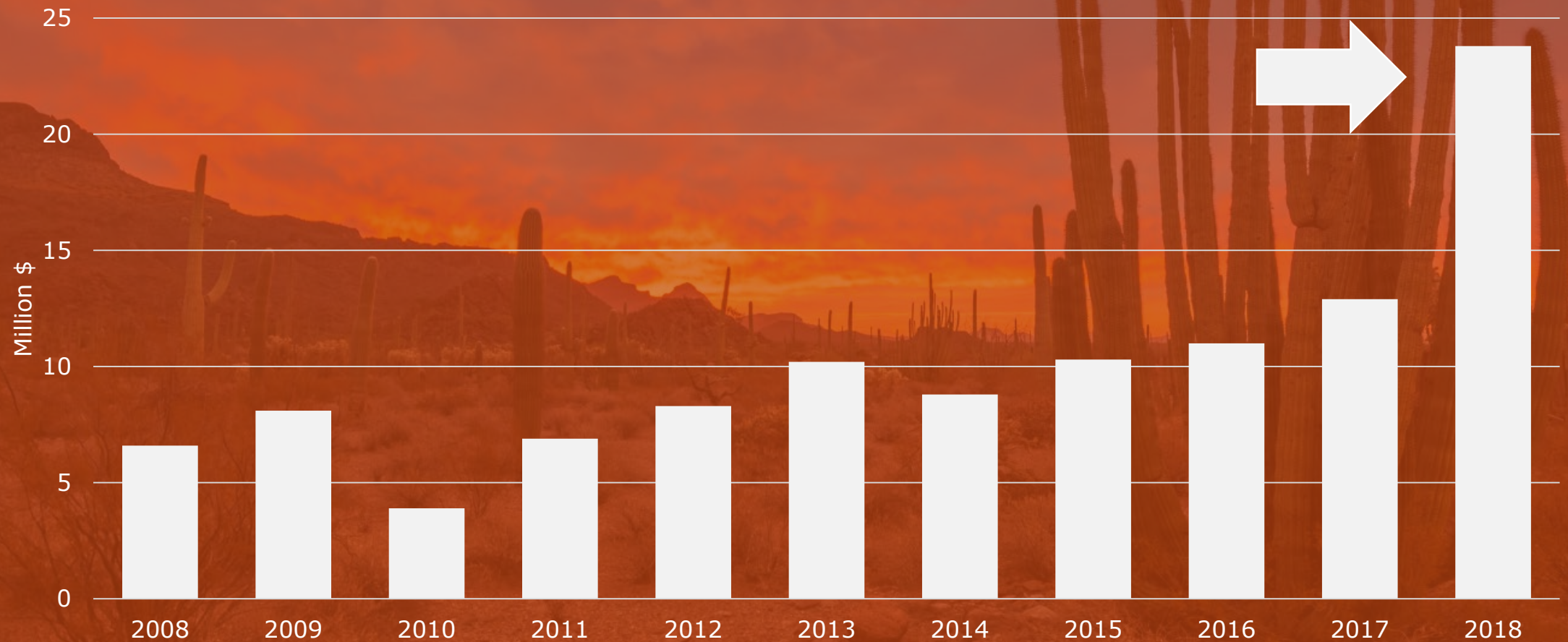
Hotel, Motel, STVR

La Paz



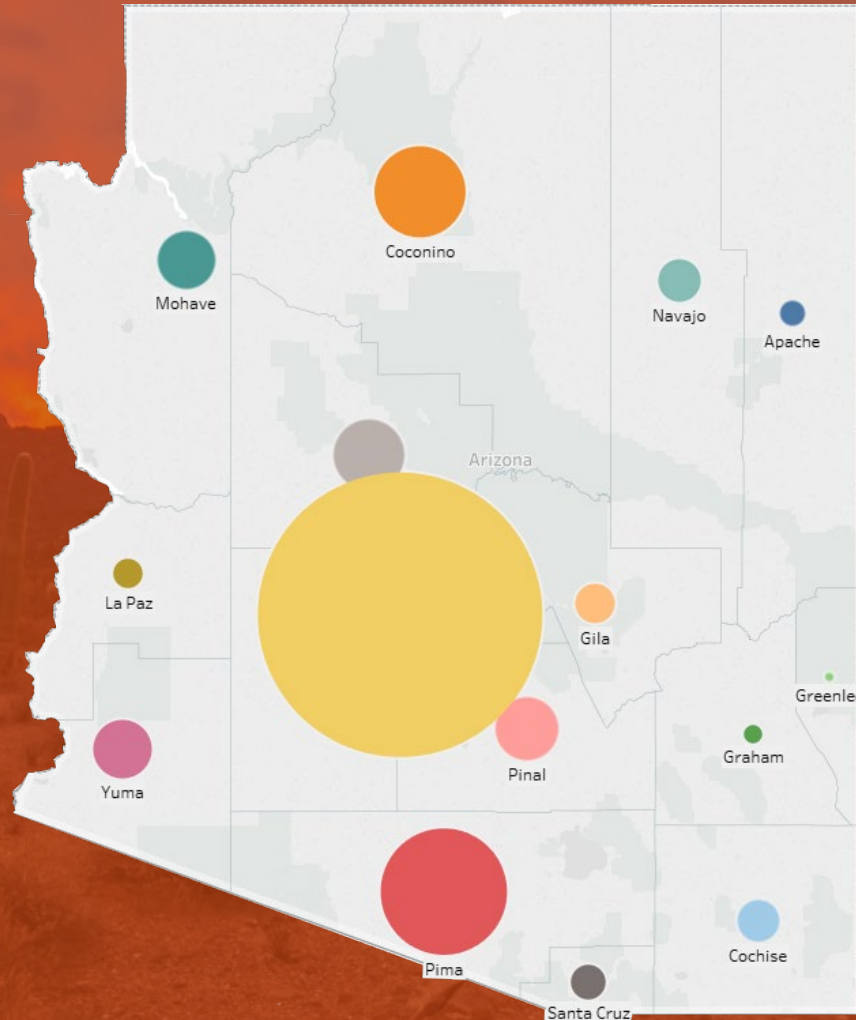
Private Home

# Spending by Hotel Guests in La Paz





# Direct Travel Spend by County





A scenic photograph of a waterfall cascading over a red rock cliff. The water is white and frothy as it falls into a pool of blue water at the bottom. The surrounding cliffs are rugged and reddish-brown, with some green vegetation growing on them. The sky is blue with some white clouds. A semi-transparent blue rectangle is overlaid on the center of the image, containing the text 'Domestic Visitor Profile'.

# Domestic Visitor Profile

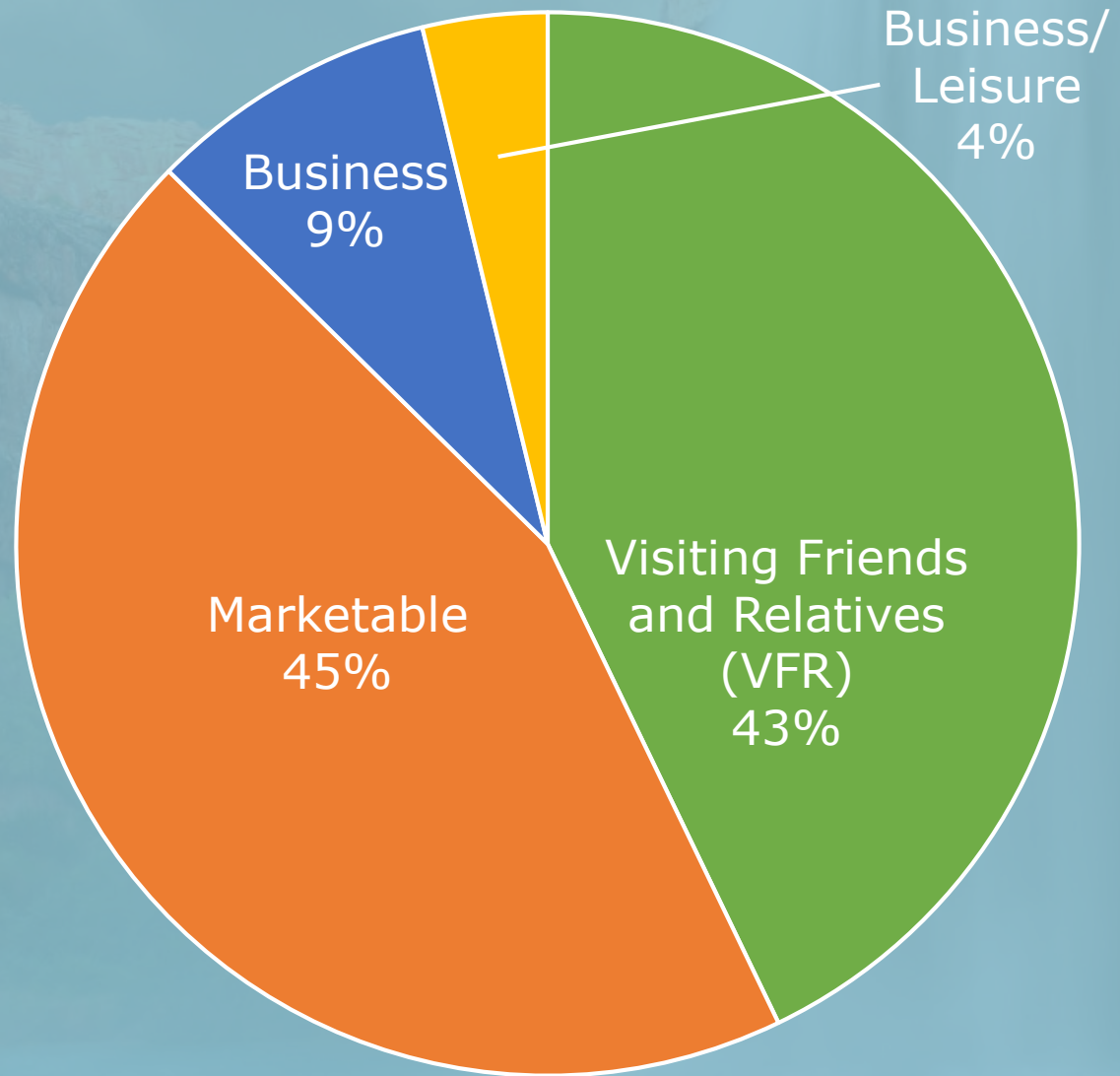




DOMESTIC VISITS IN 2018



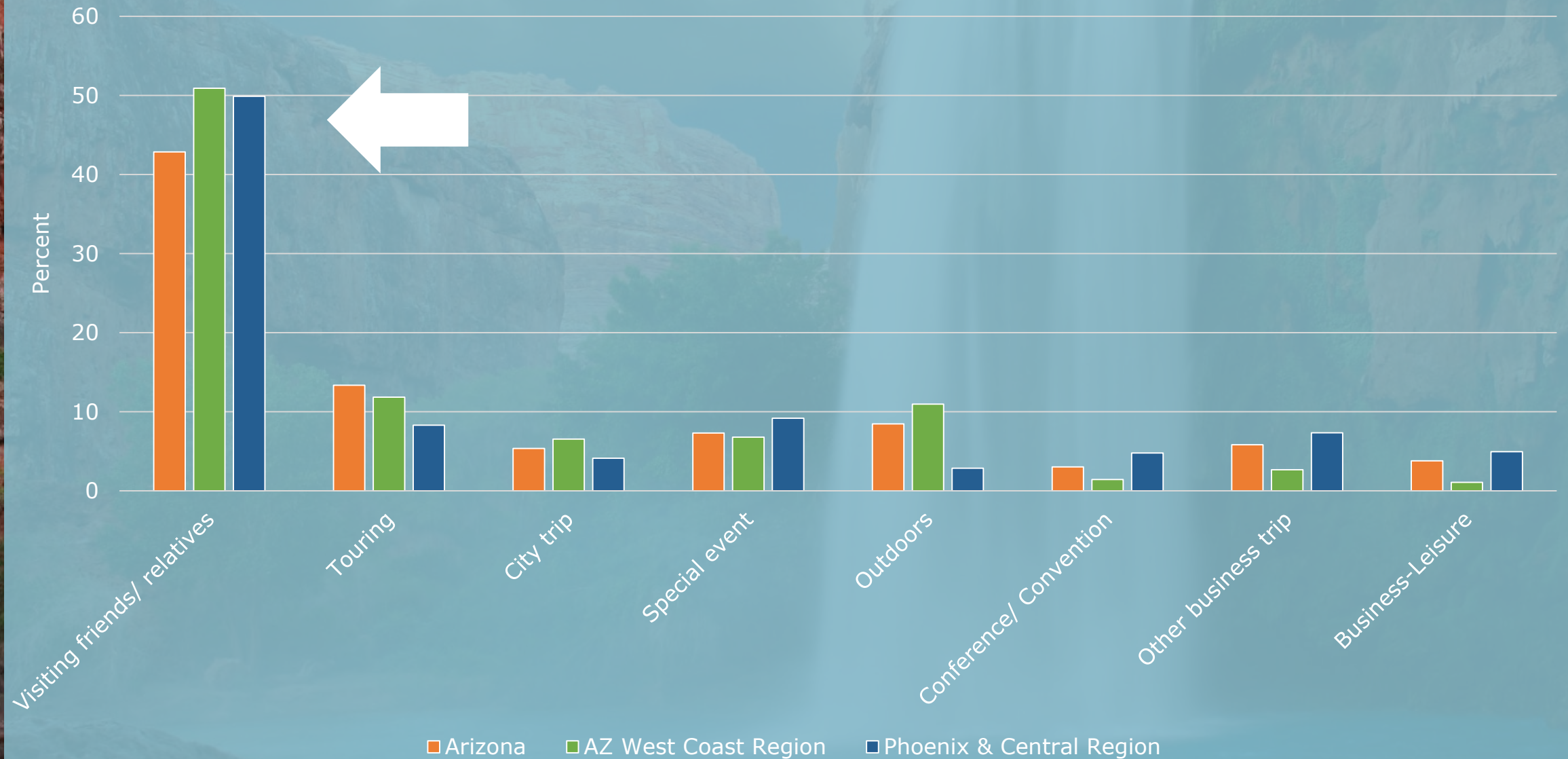
39.6  
**MILLION**







## Main Purpose of Trip





# Why did they choose us?

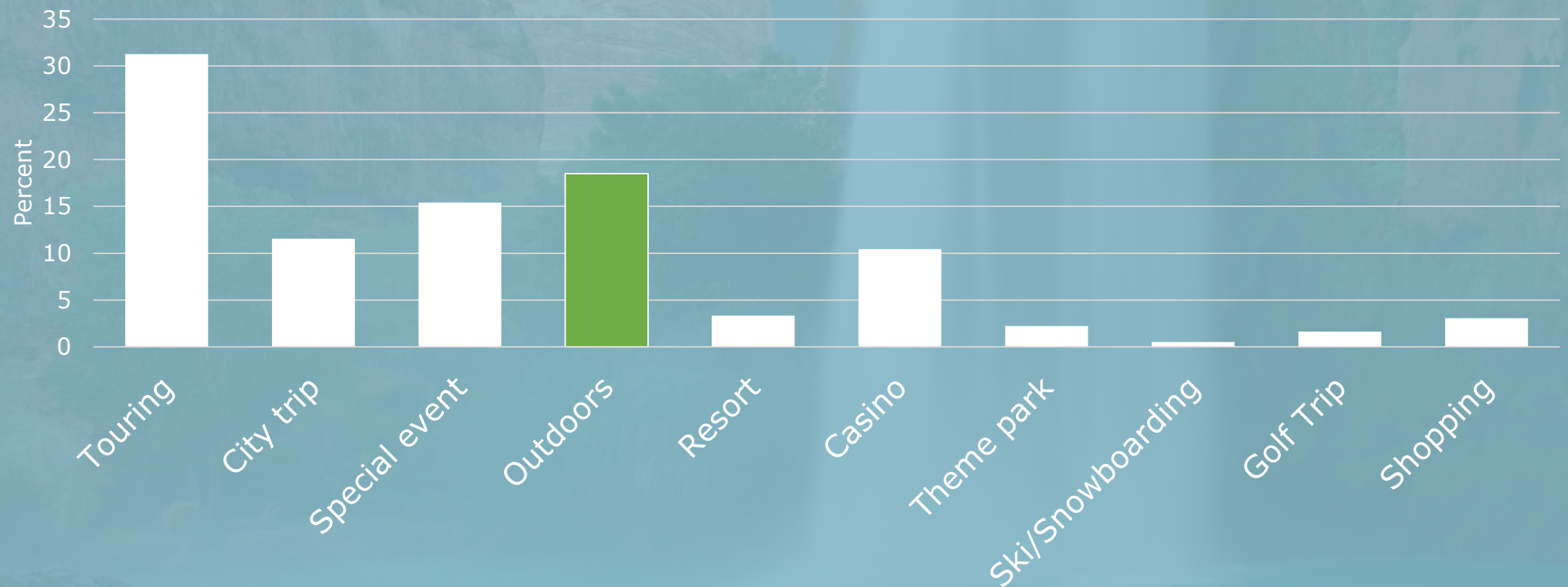
**Main Purpose of Marketable Trips to Arizona**





# Why did they choose us?

**Main Purpose of Marketable Trips to Arizona**





# Why did they choose us?

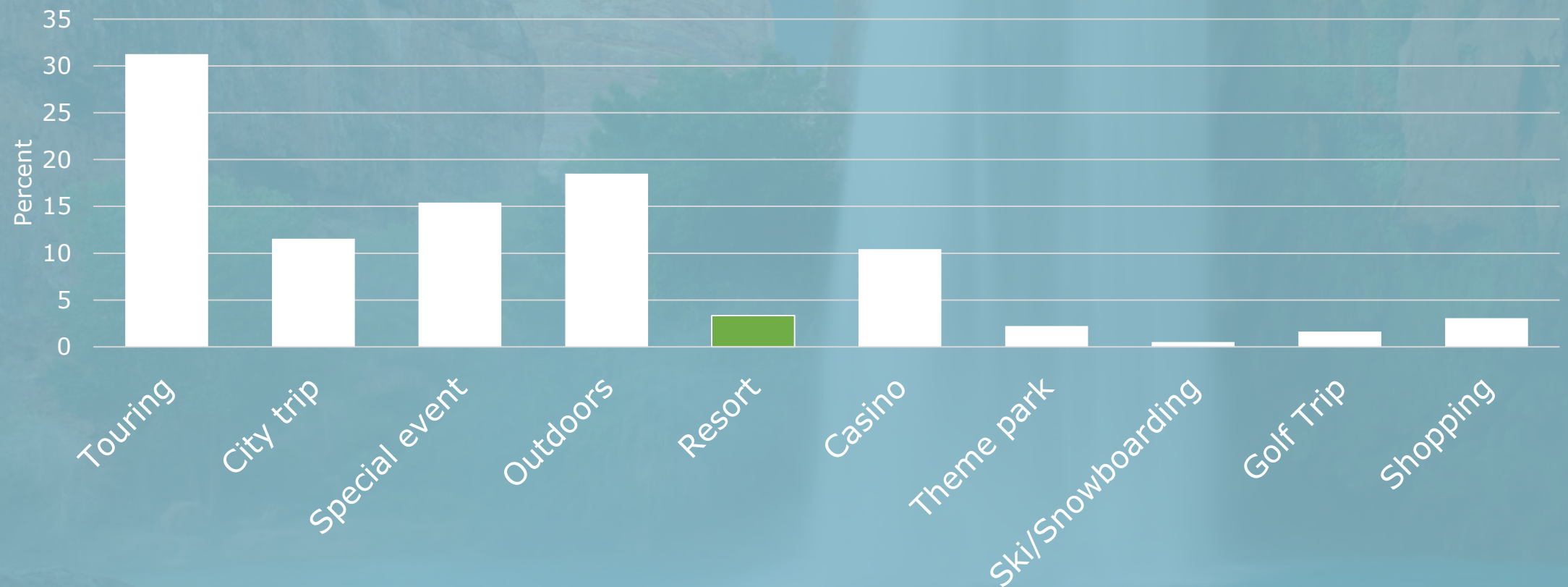
**Main Purpose of Marketable Trips to Arizona**





# Why did they choose us?

**Main Purpose of Marketable Trips to Arizona**







# Travel Drivers to Arizona – Promote these!

State/National/Tribal  
parks

Diverse scenery

Offers something for  
the family

Great vacation for  
couples

Warm, friendly,  
welcoming people

Fun and relaxing place  
to visit





# Arizona Destination Differentiators – Maintain these!

American Indian  
experience

Old West

Outdoor Adventure

Good place to relax by  
the pool

Easy to fly to





# Top Activities

Shopping

National/State Park

Landmark/Historic  
Site

Casino

Hiking/Backpacking

Swimming

Bar/Nightclub

Museum

Fine/Upscale Dining





# Top Activities

Shopping

Casino

Bar/Nightclub

**National/State Park**

**Hiking/Backpacking**

Museum

**Landmark/Historic Site**

Swimming

Fine/Upscale Dining

\*Activities in which participation outpaces the national average by 5% or more.



The background of the slide is a scenic landscape. It features a calm river in the foreground, reflecting the sky and the surrounding mountains. The mountains are rugged and have a reddish-brown hue, suggesting a desert or canyon environment. The sky is filled with scattered white clouds. A large, semi-transparent blue rectangle is overlaid on the center of the image, serving as a background for the title text.

# Origin Markets





# Arizona

## VFR

Arizona  
California  
Texas  
Illinois  
Colorado

## Marketable

Arizona  
California  
Texas  
Florida  
New York

## Business

Arizona  
California  
Texas  
Florida  
Colorado





# West Coast Region

## VFR

California  
Arizona  
Texas  
Illinois  
Florida

## Marketable

California  
Arizona  
Texas  
New York  
Nevada

## Business

Arizona  
California  
Utah  
Georgia  
Texas





# Northern Region

## VFR

Arizona  
California  
Texas  
Florida  
Illinois

## Marketable

Arizona  
California  
Texas  
New York  
Florida

## Business

Arizona  
California  
Colorado  
Michigan  
Georgia





# North Central Region

## VFR

California  
Arizona  
Illinois  
Florida  
Colorado

## Marketable

Arizona  
California  
New York  
Texas  
Illinois

## Business

Arizona  
California  
Washington  
Montana  
Texas





# Tucson & Southern Region

## VFR

Arizona  
California  
Illinois  
Minnesota  
Texas

## Marketable

Arizona  
California  
Texas  
Washington  
Illinois

## Business

Arizona  
California  
Texas  
Florida  
Colorado





# Phoenix & Central Region

## VFR

Arizona  
California  
Illinois  
Colorado  
Texas

## Marketable

Arizona  
California  
Texas  
Nevada  
Illinois

## Business

Arizona  
California  
Illinois  
Texas  
Florida

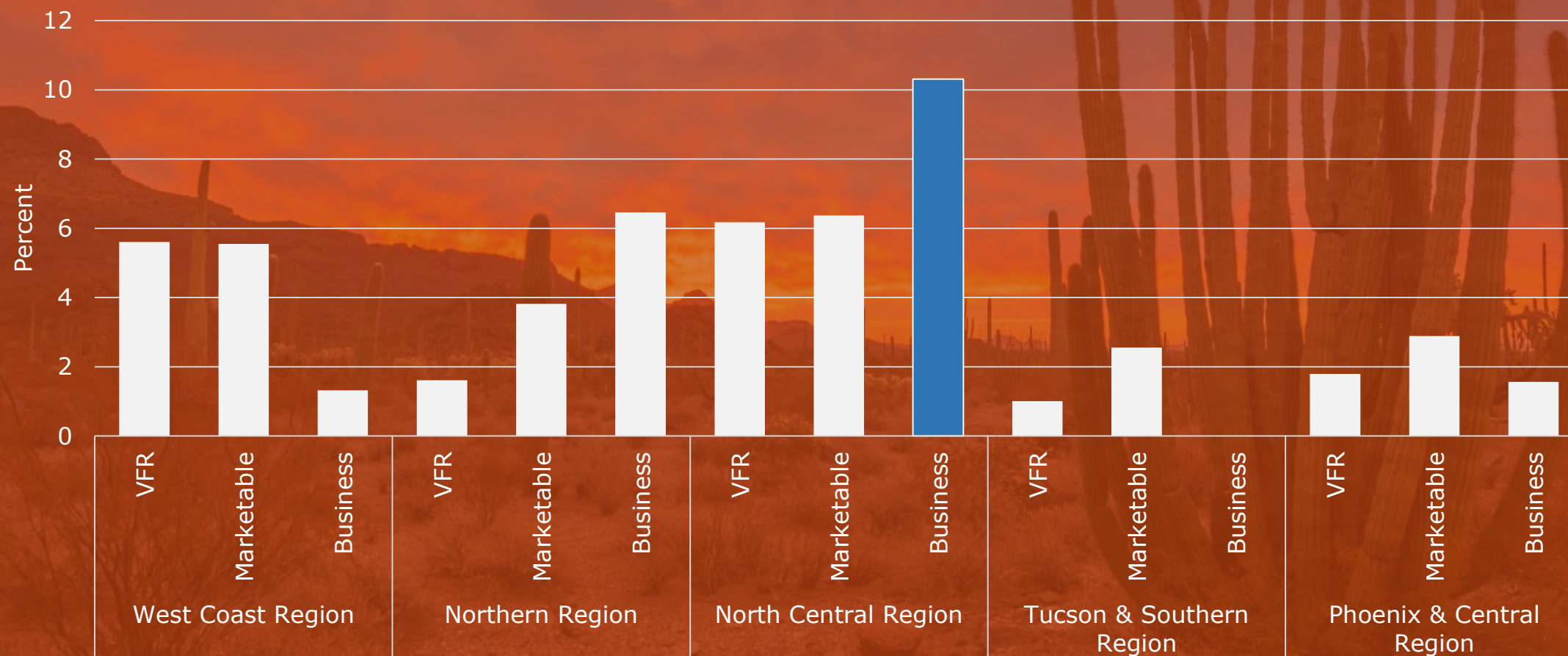




# Destination Differentiators

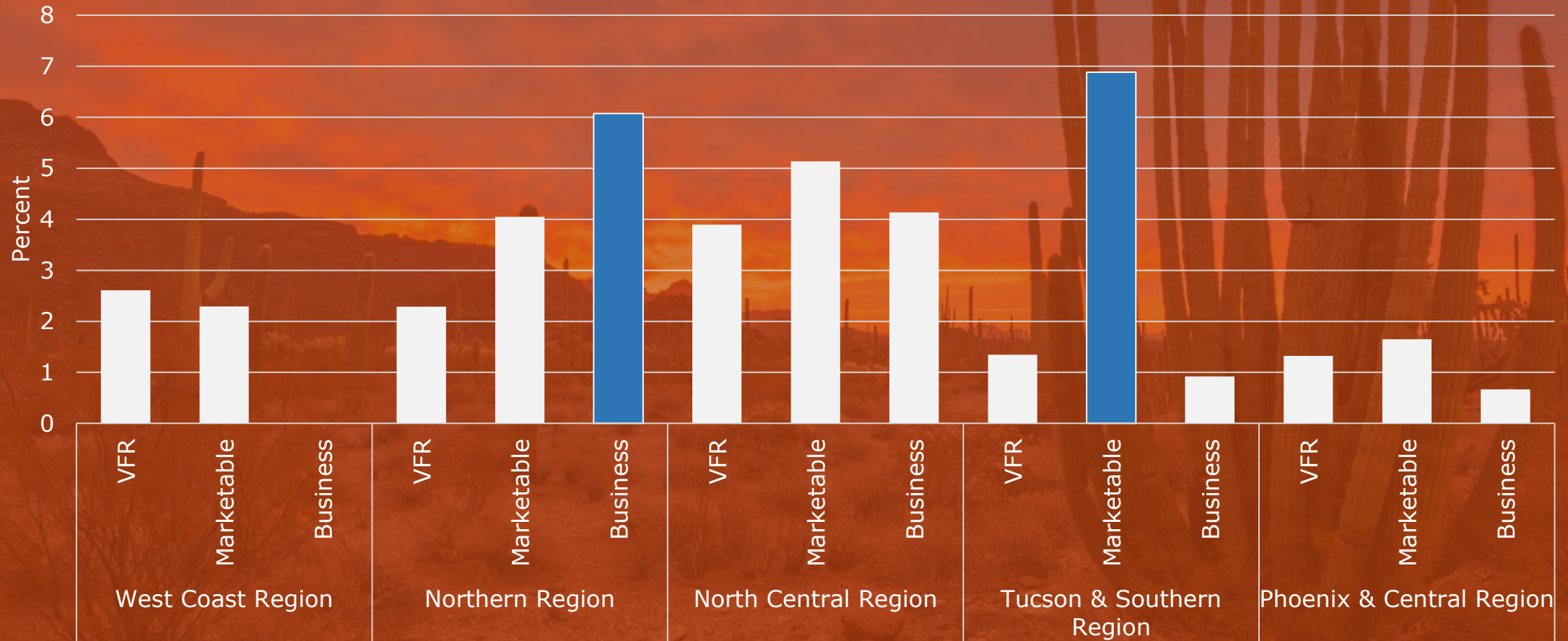


# Off-Roading



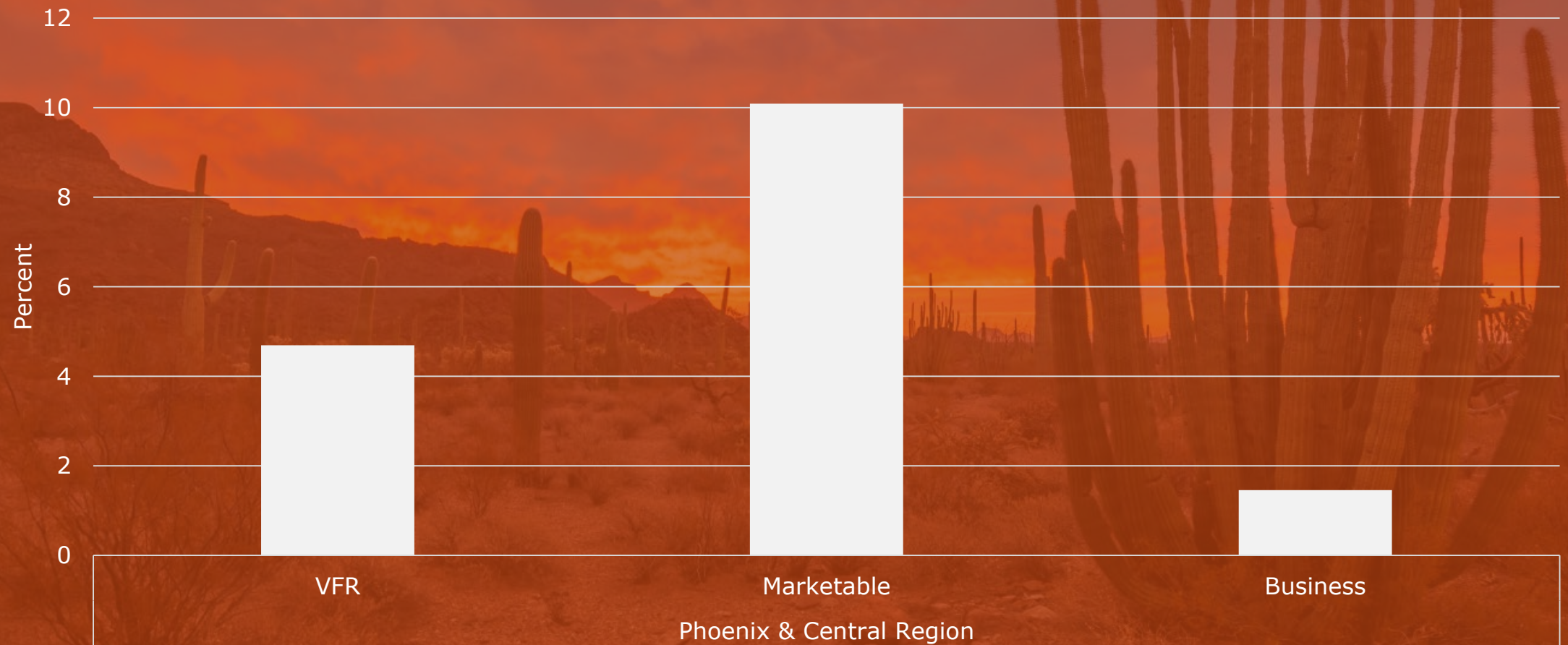


# Birding



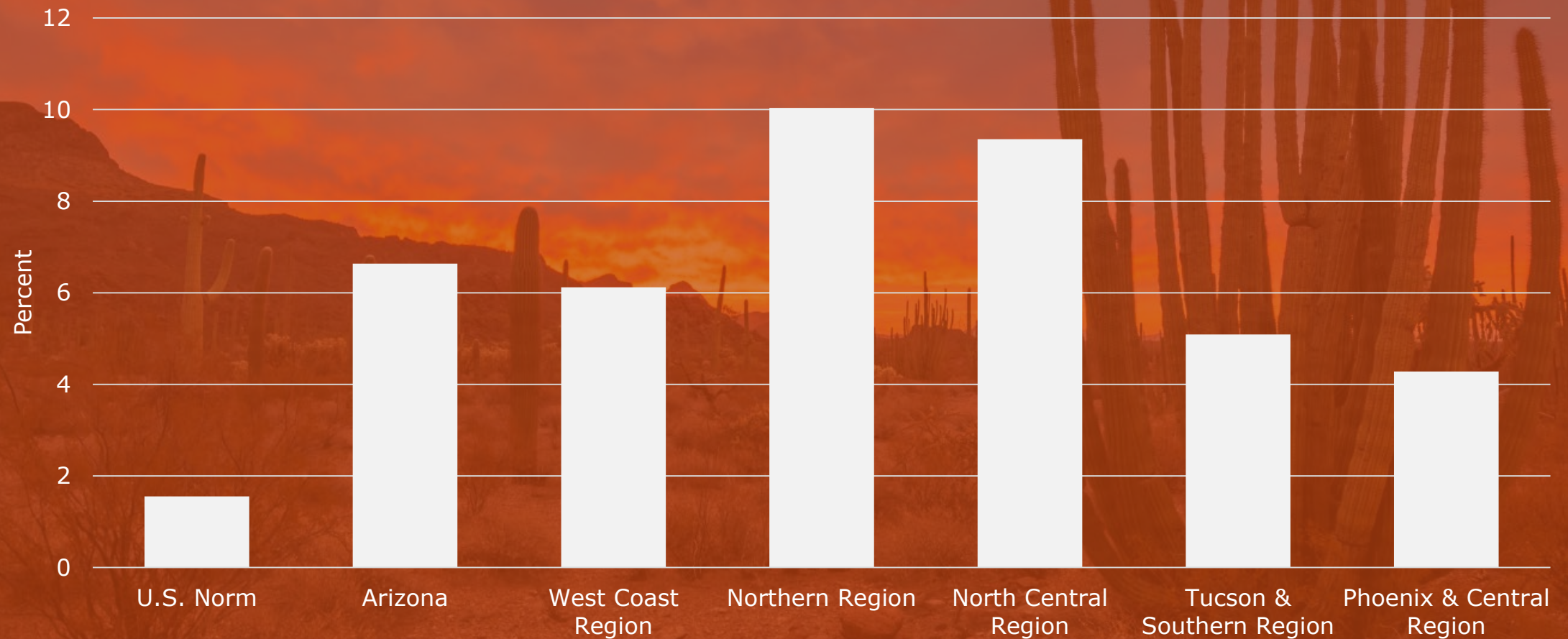


# Professional/College Sports Event





# Visit an American Indian Community







# International Visitation





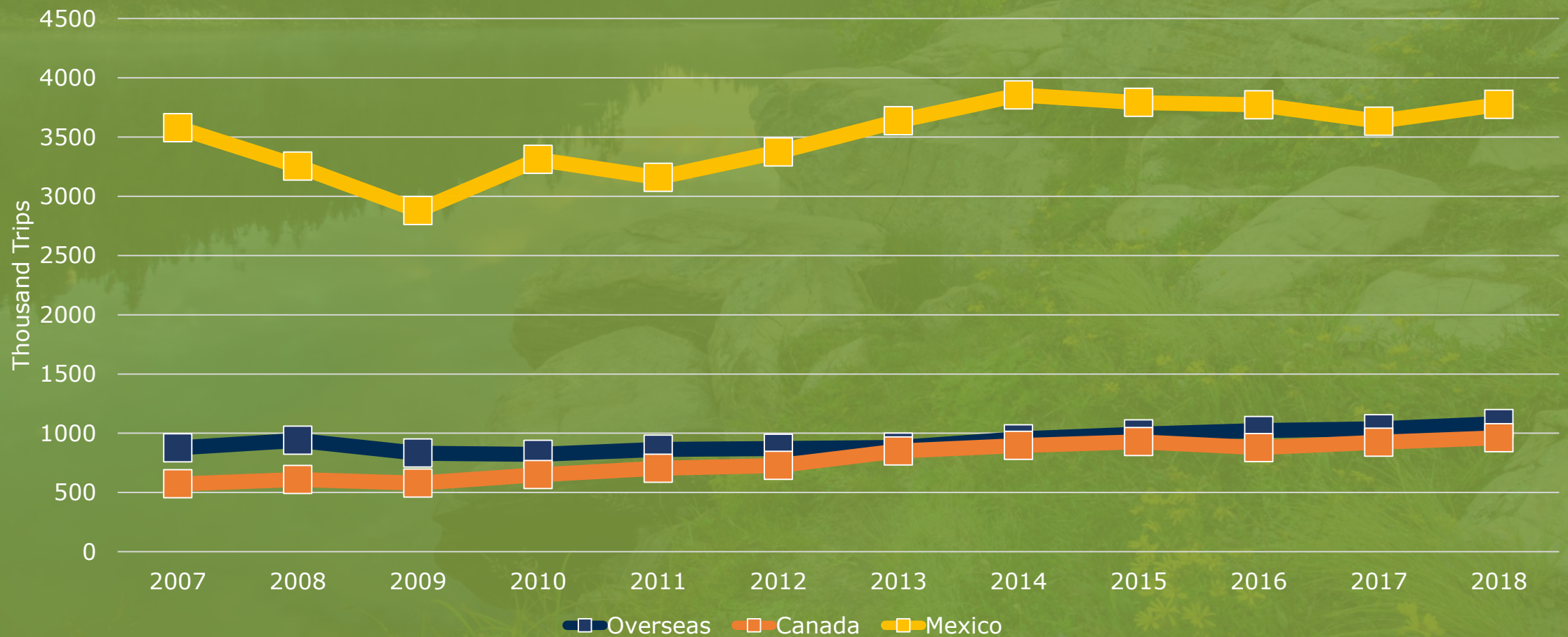
INTERNATIONAL OVERNIGHT  
VISITS IN 2018



5.82  
MILLION

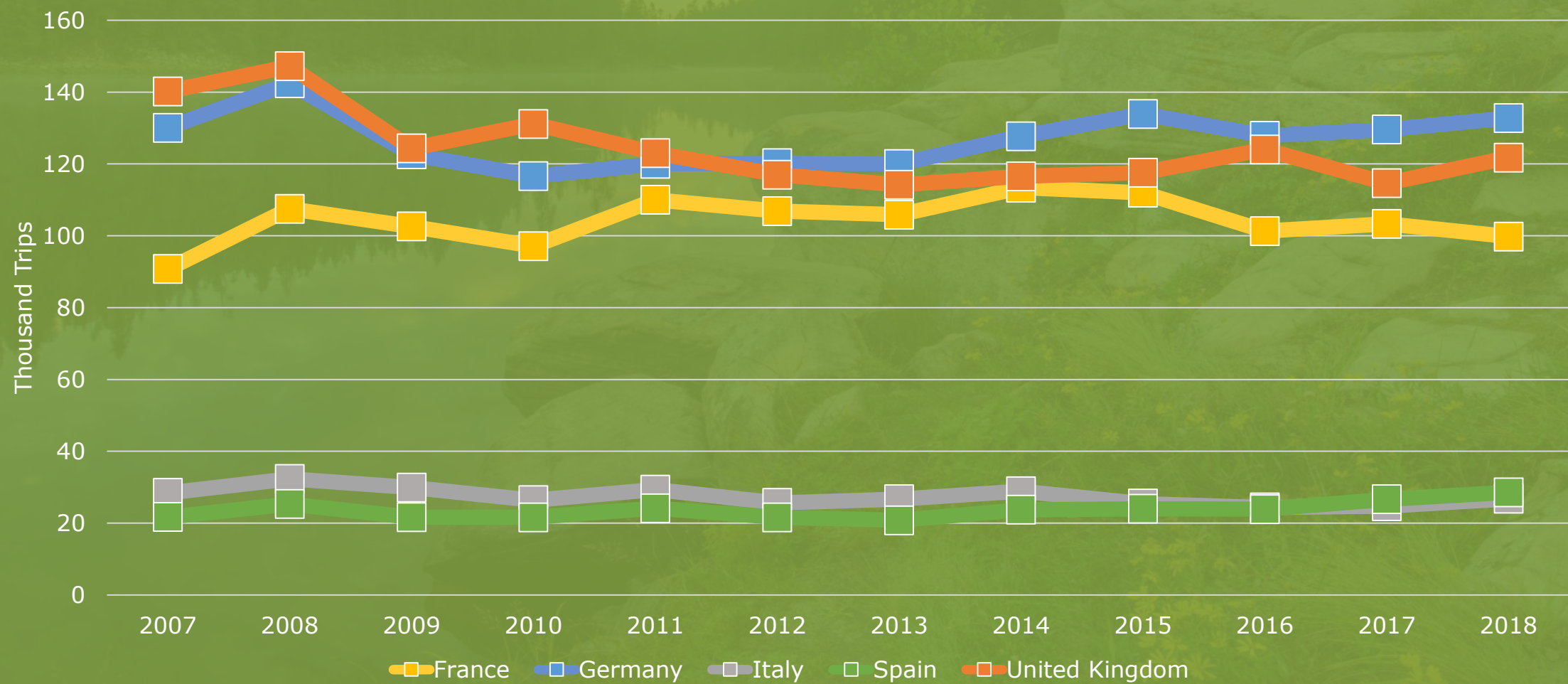


# International Visitation to AZ



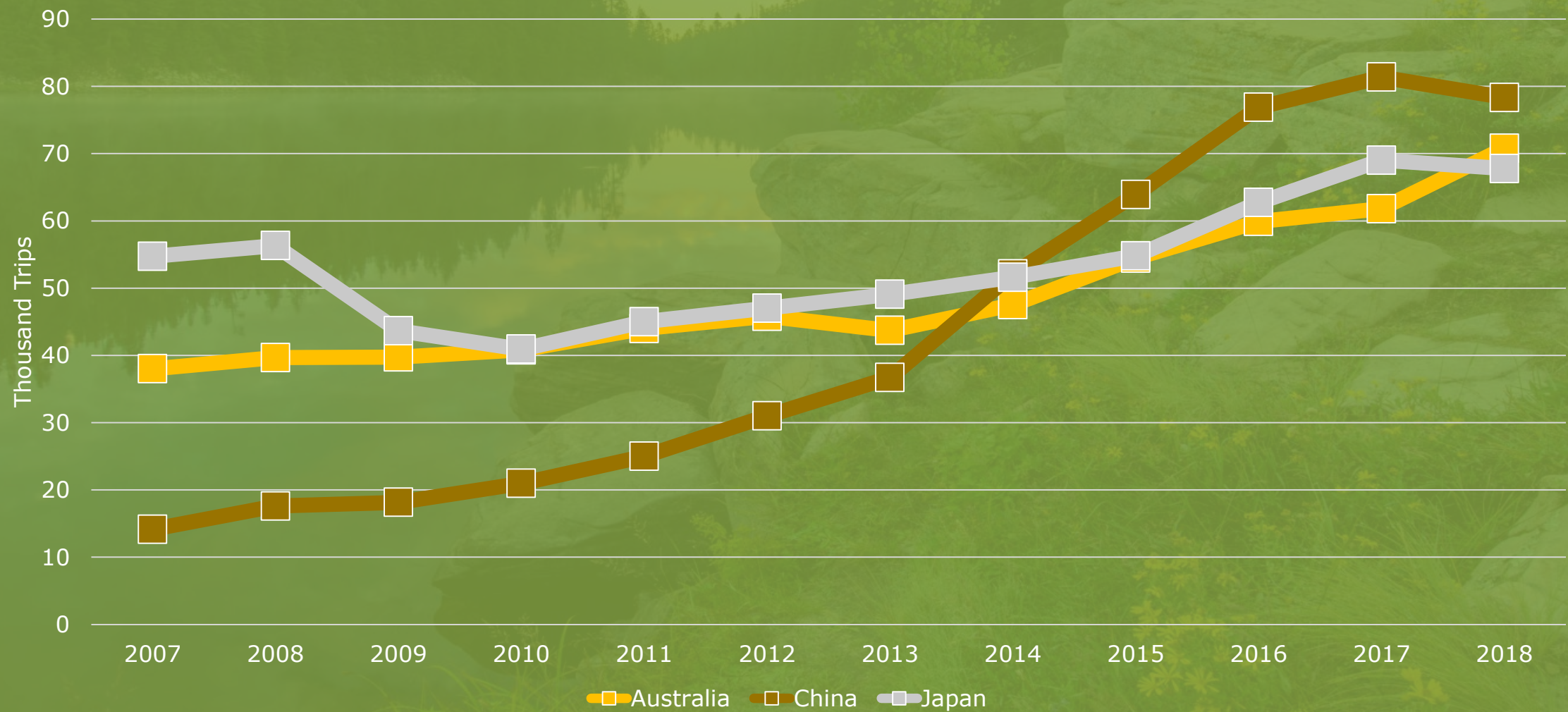


# Europe



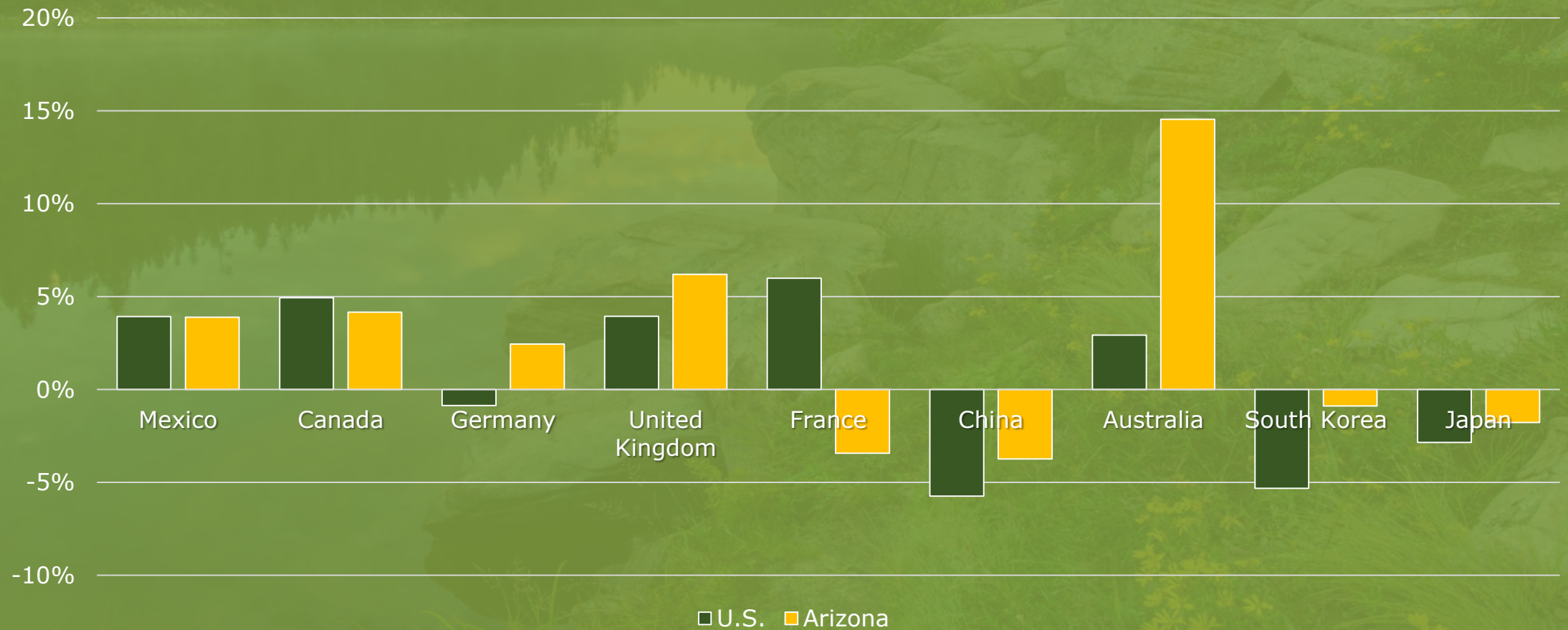


# Asia Pacific



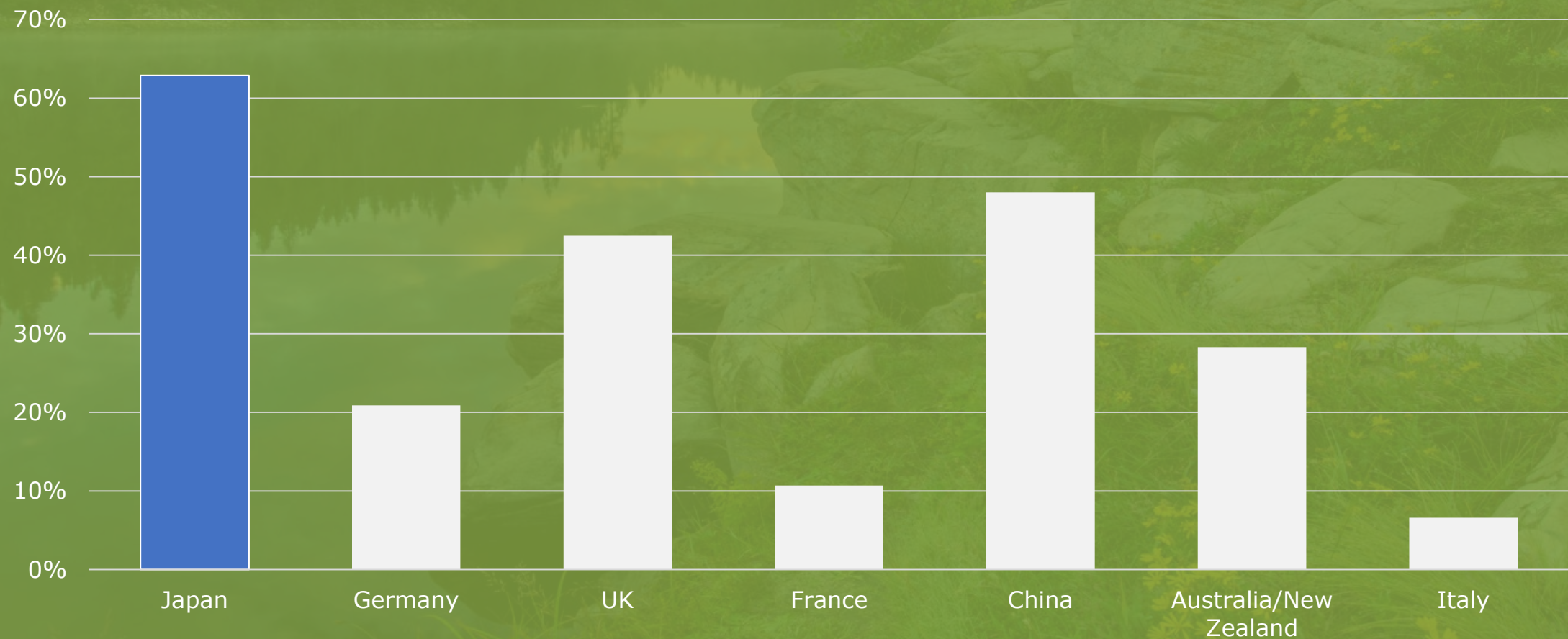


# Change in Visitation YOY



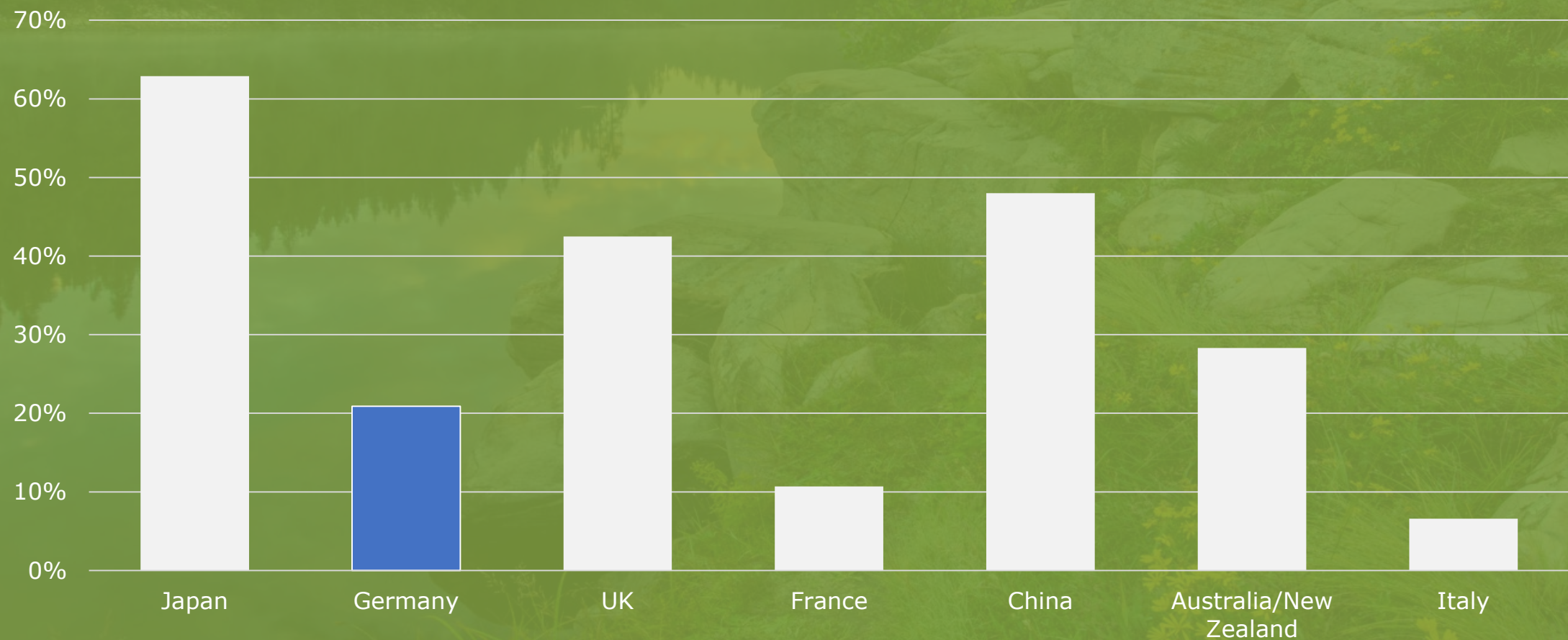


# Arizona was the MAIN destination





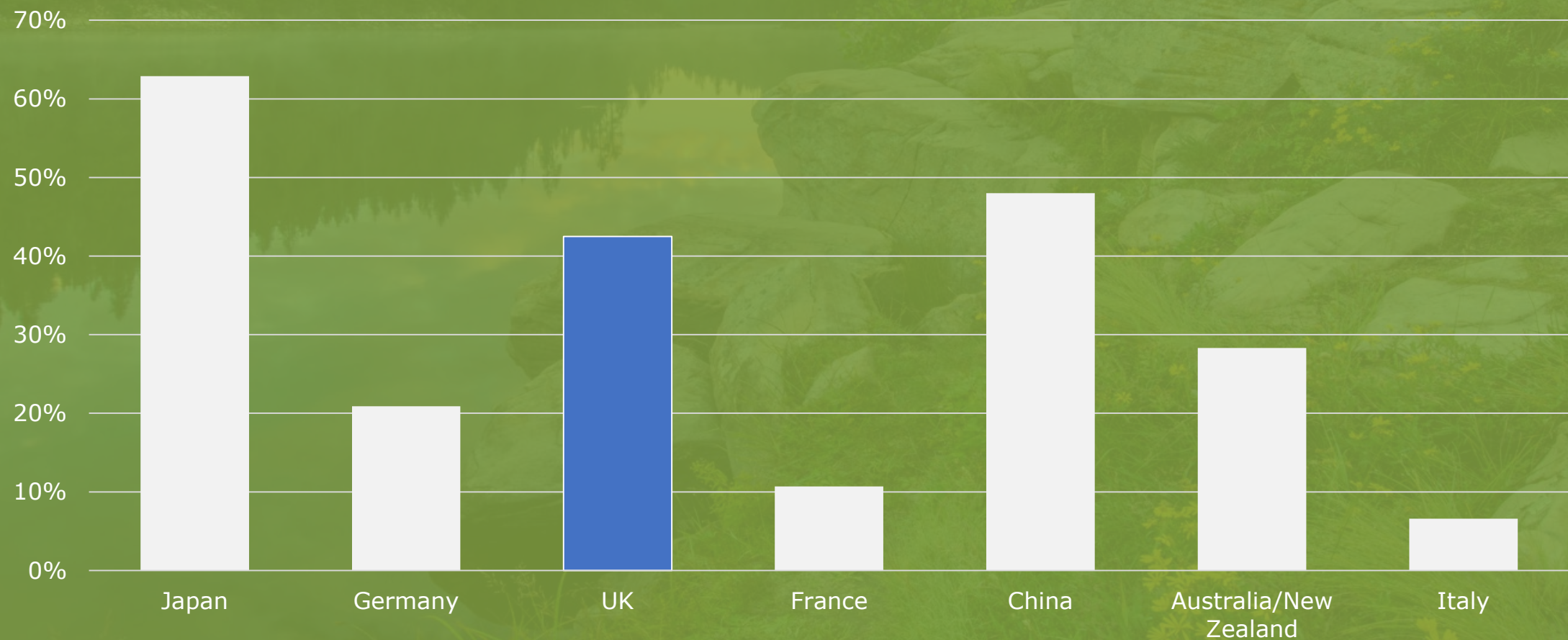
# Arizona was the MAIN destination



Source: National Travel & Tourism Office, *Survey of International Air Travelers*

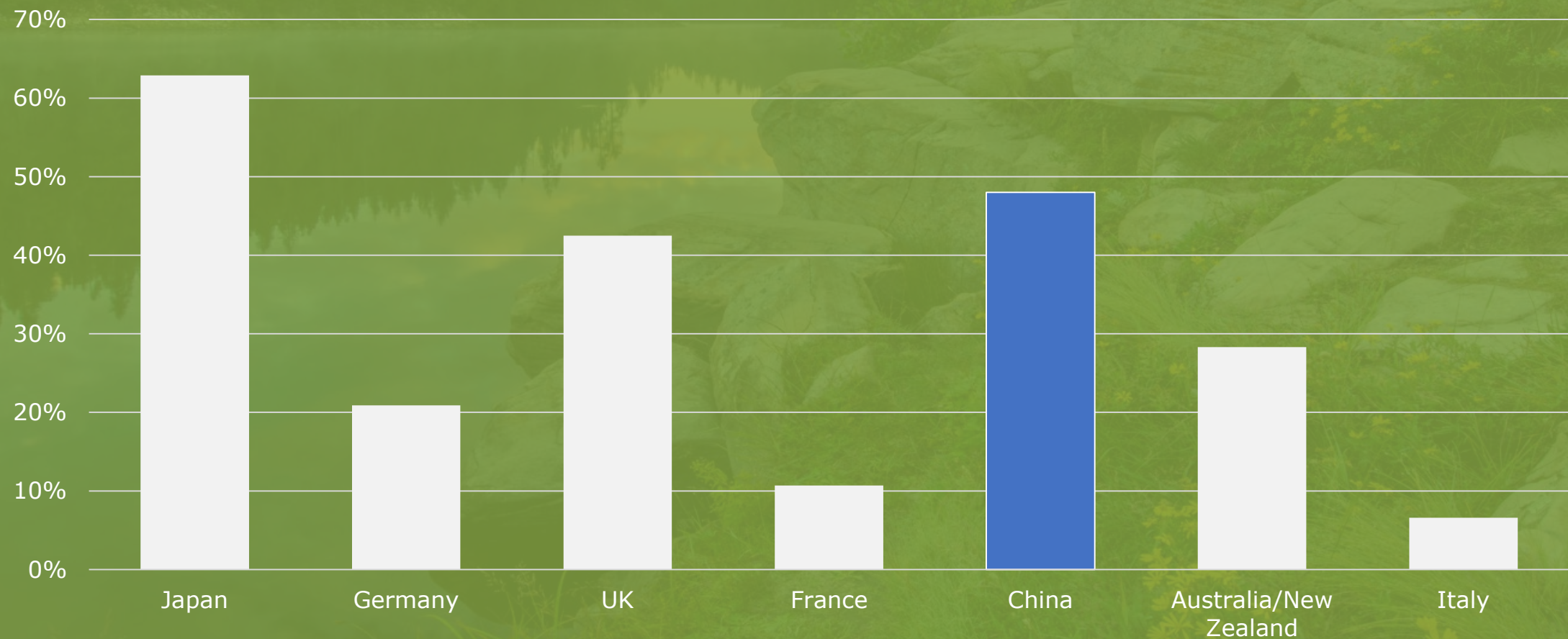


# Arizona was the MAIN destination



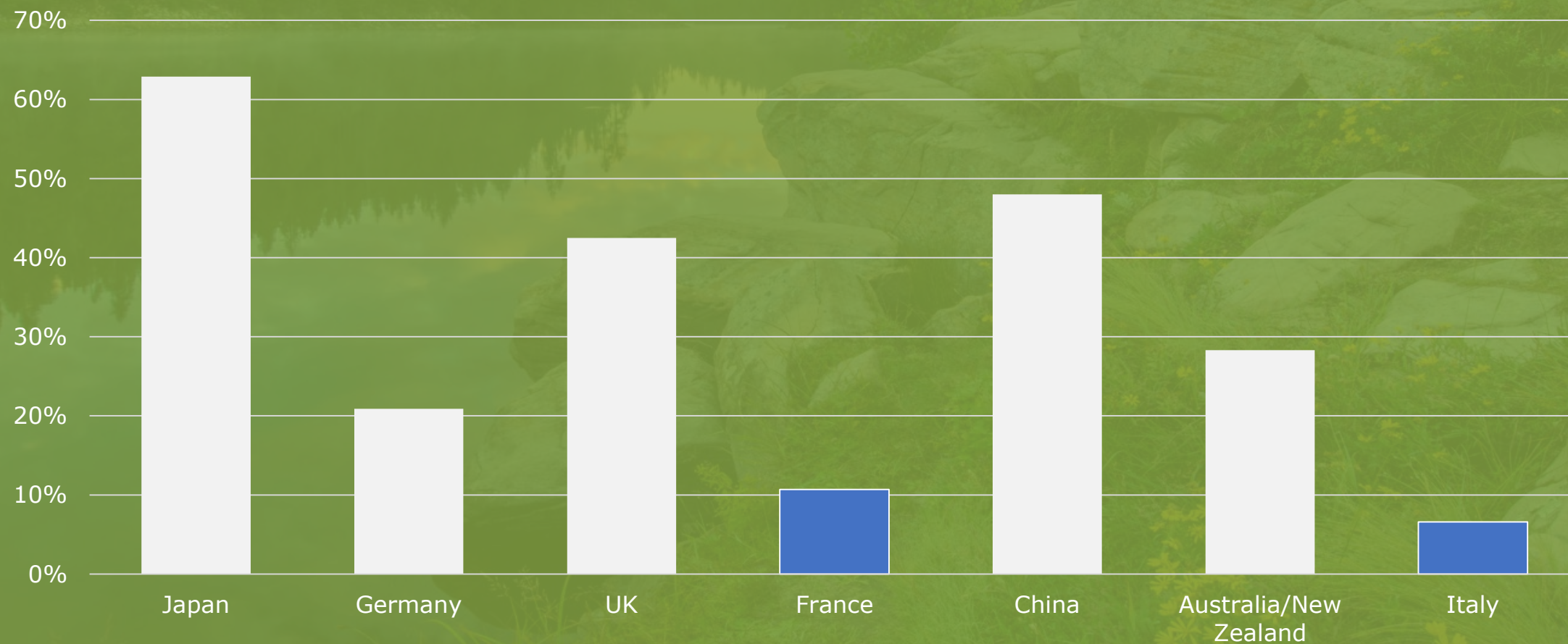


# Arizona was the MAIN destination



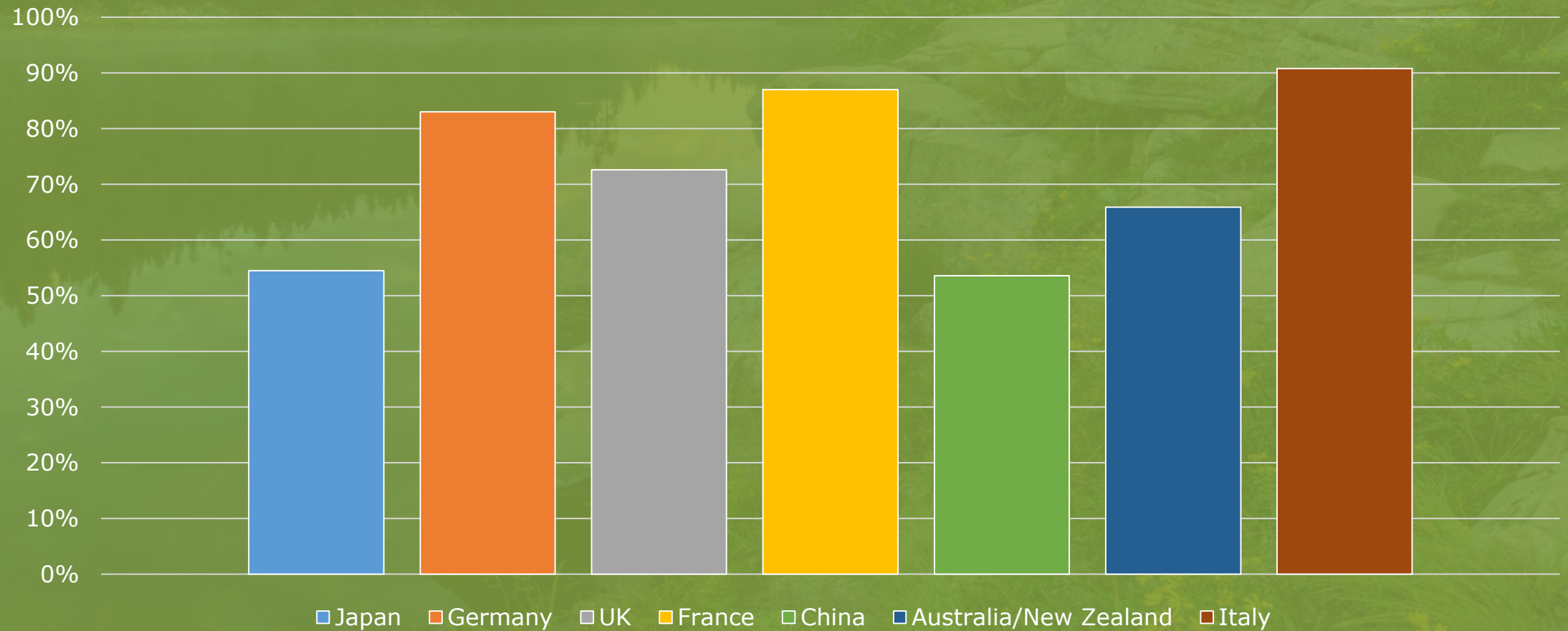


# Arizona was the MAIN destination



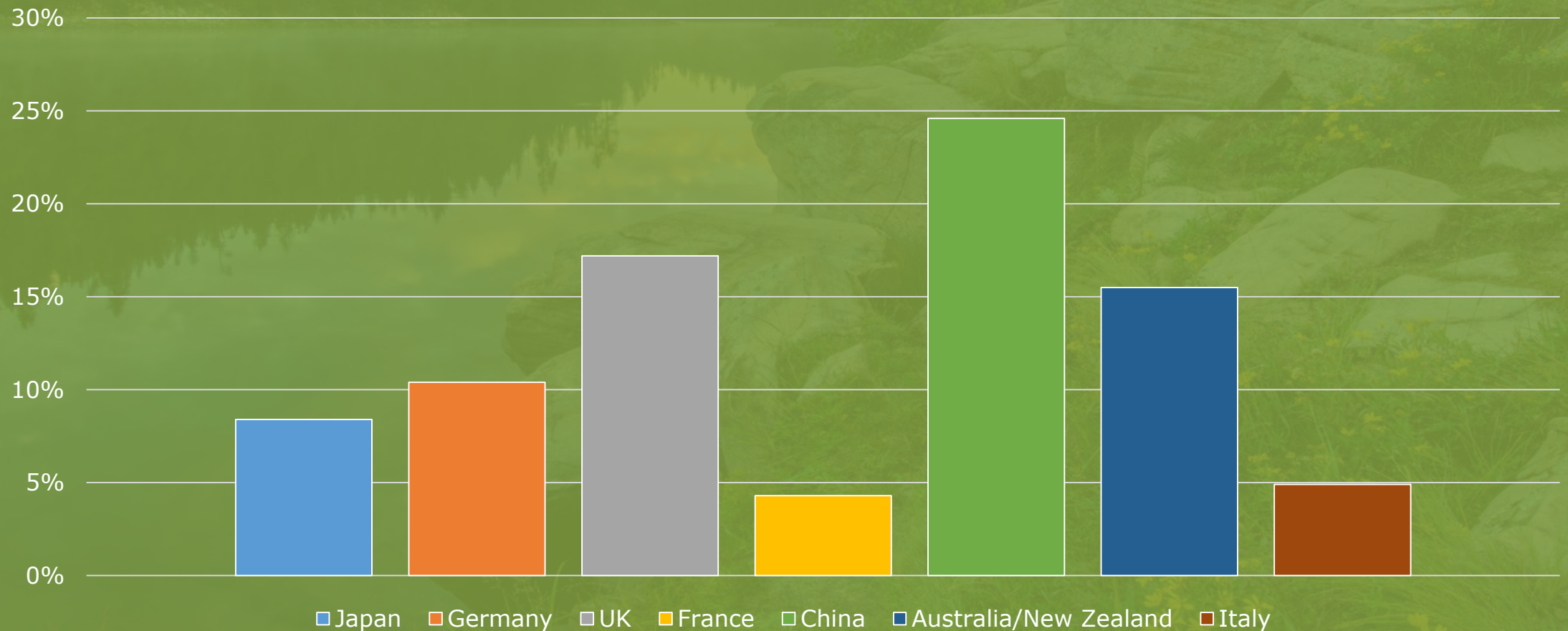


# Main Purpose - Leisure



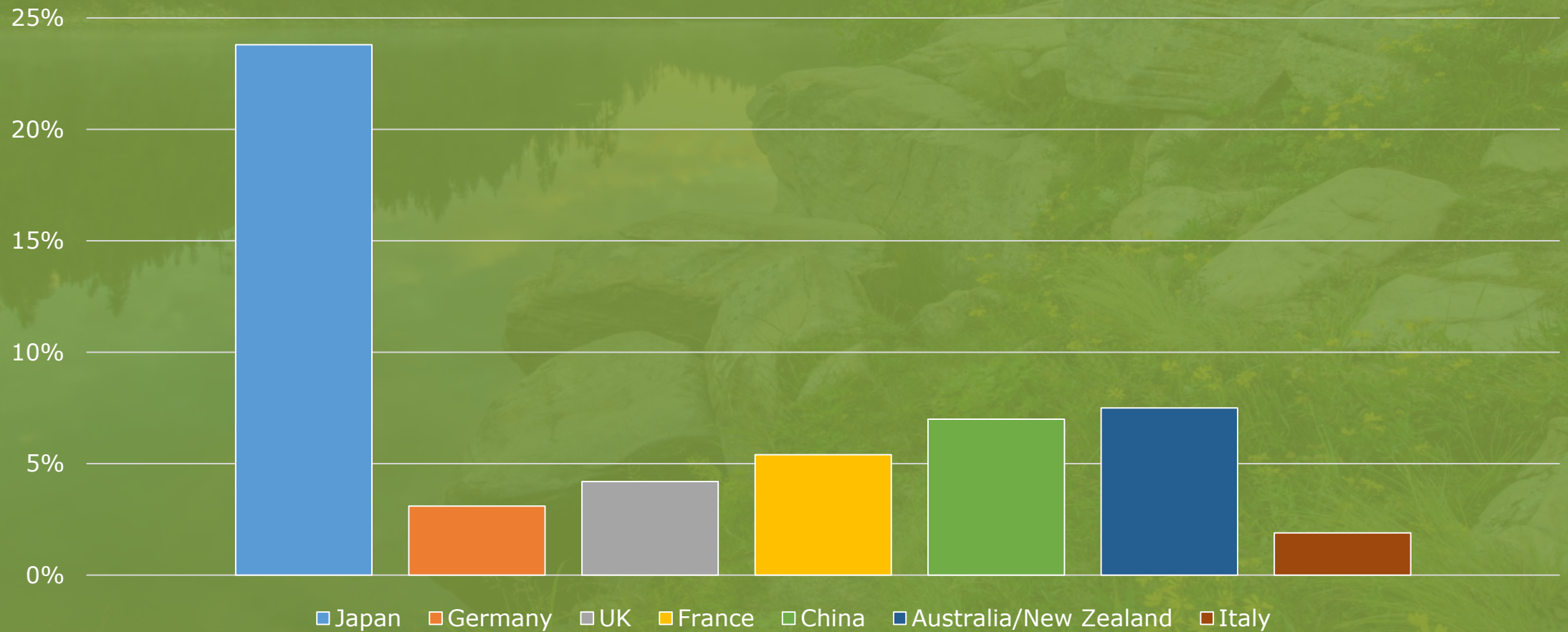


# Main Purpose – Visit Friends/Family



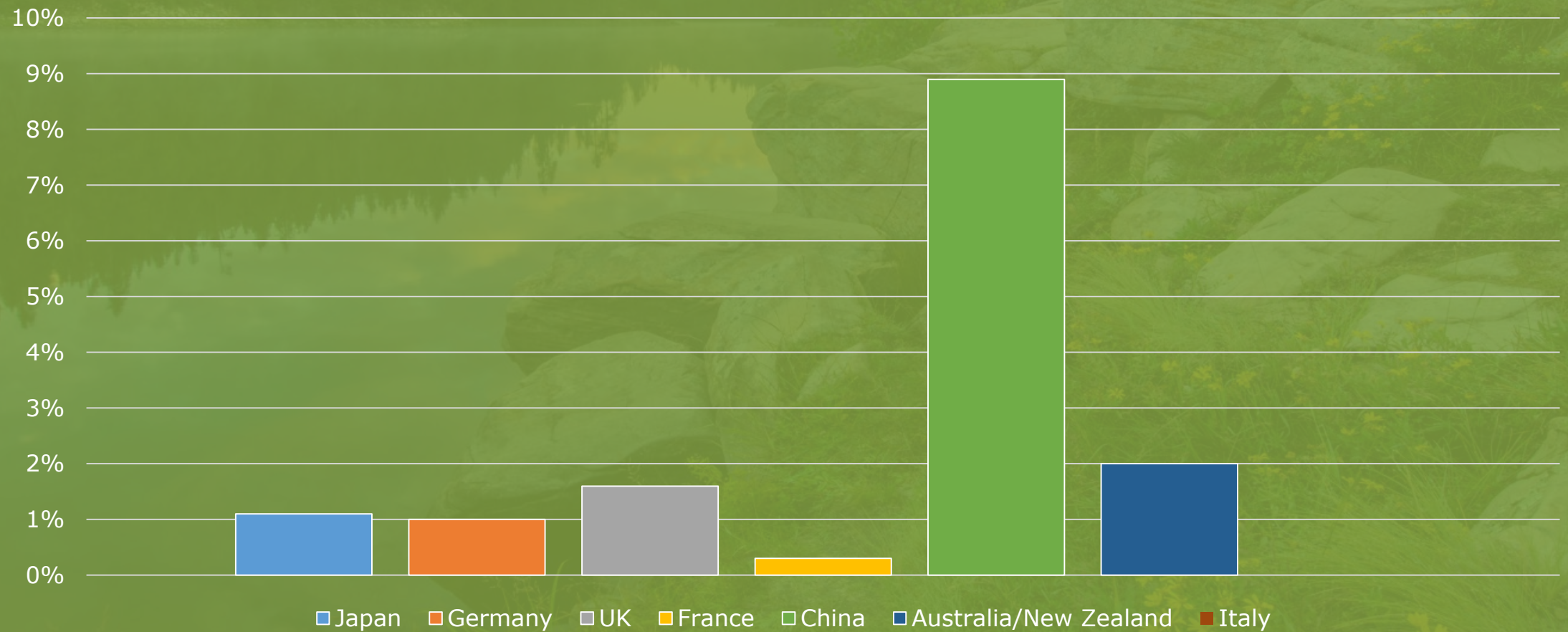


# Main Purpose – Business





# Main Purpose – Education



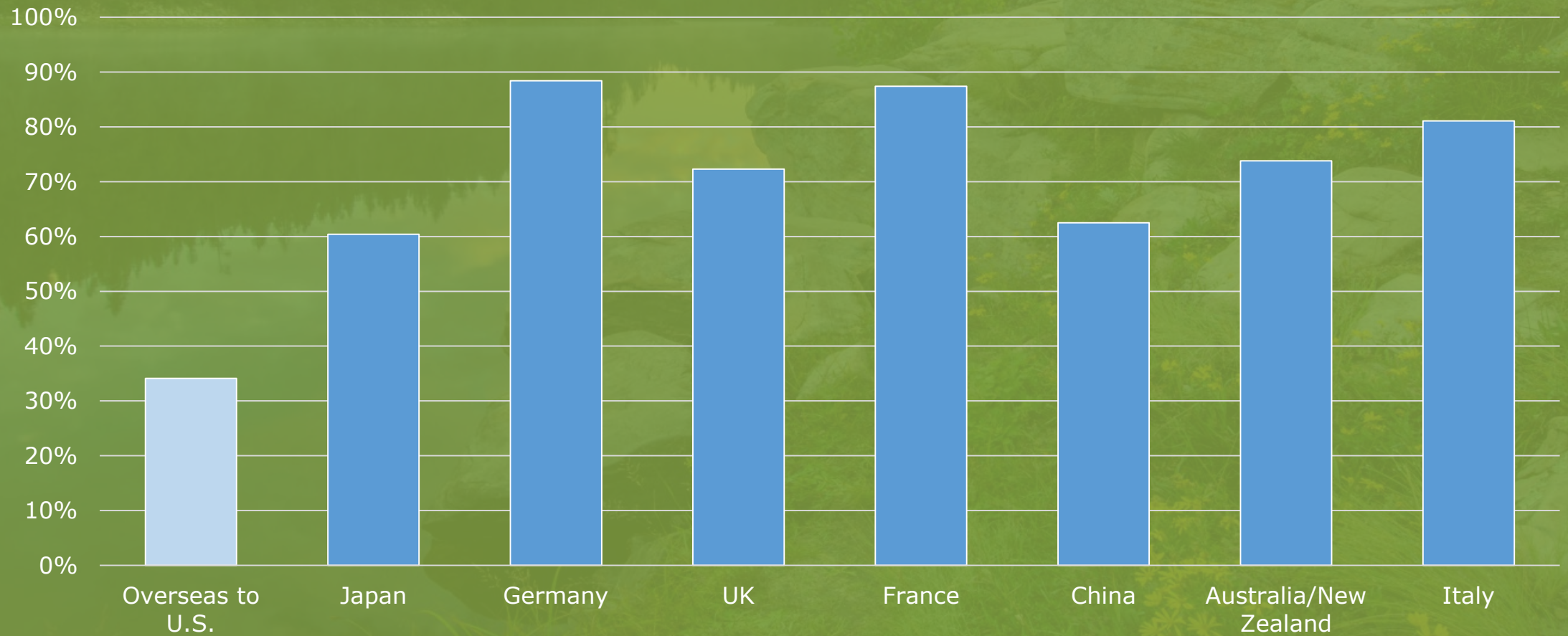


# Activities - Overseas





# National Parks/Monuments







# Top Activities

## Japan

- National Parks
- Guided Tours
- Casino

## Germany

- National Parks
- Small Towns/Countryside
- Historical Locations



The background of the slide is a scenic photograph of a forest landscape. In the foreground, there are large, light-colored rocks and patches of green grass with small yellow wildflowers. In the middle ground, a calm lake reflects the surrounding forest. The background is filled with dense evergreen trees under a sky with soft, white clouds. A semi-transparent green rectangular box is overlaid on the image, containing the text.

# Top Activities

## **United Kingdom**

- National Parks
- Small Towns/Countryside
- Historical Locations

## **France**

- National Parks
- Amusement/Theme Parks
- Small Towns/Countryside





# Top Activities

## China

- Shopping
- National Parks
- Fine Dining
- Small Towns/Countryside

## Australia

- National Parks
- Small Towns/Countryside
- Historical Locations





# Look Ahead 2019



## NATIONAL PARKS



**0.8%**

## STATE PARKS



**-1.5%**

## AIRPORTS



**4.0%**

## GROSS SALES

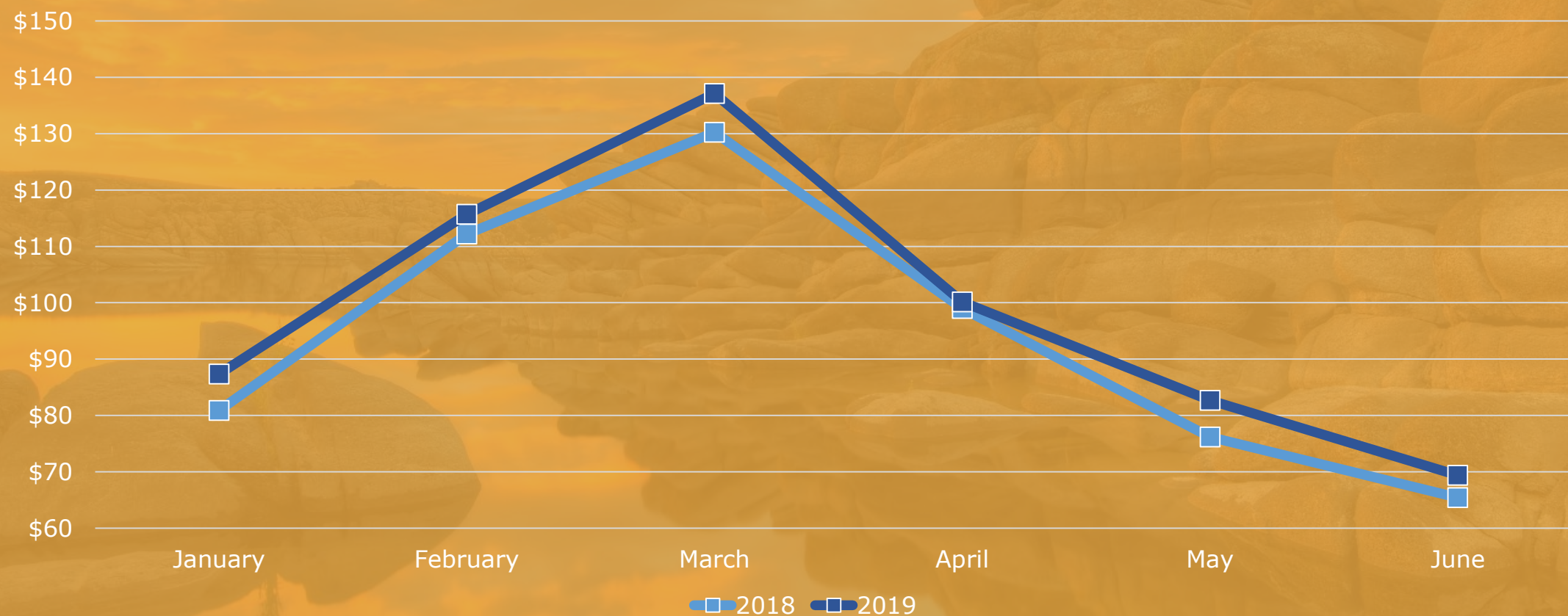


**5.5%**





# LODGING – Arizona RevPAR

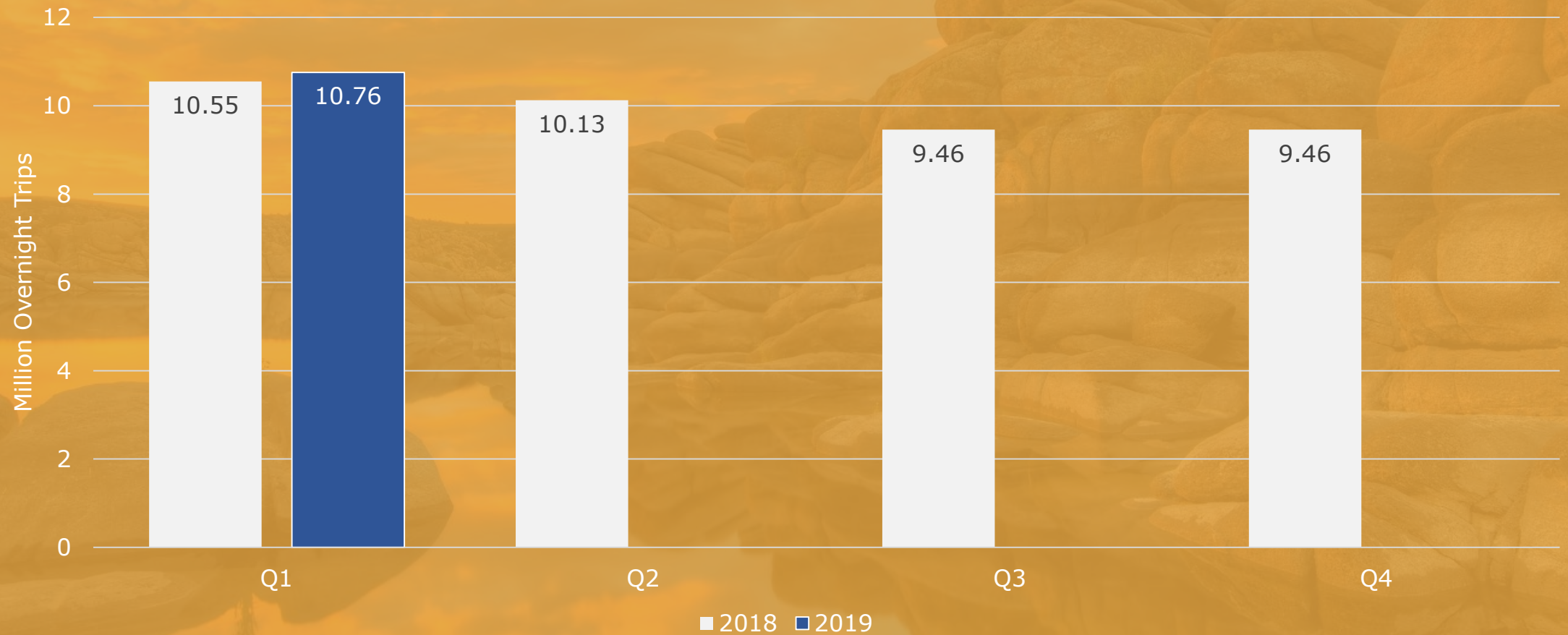








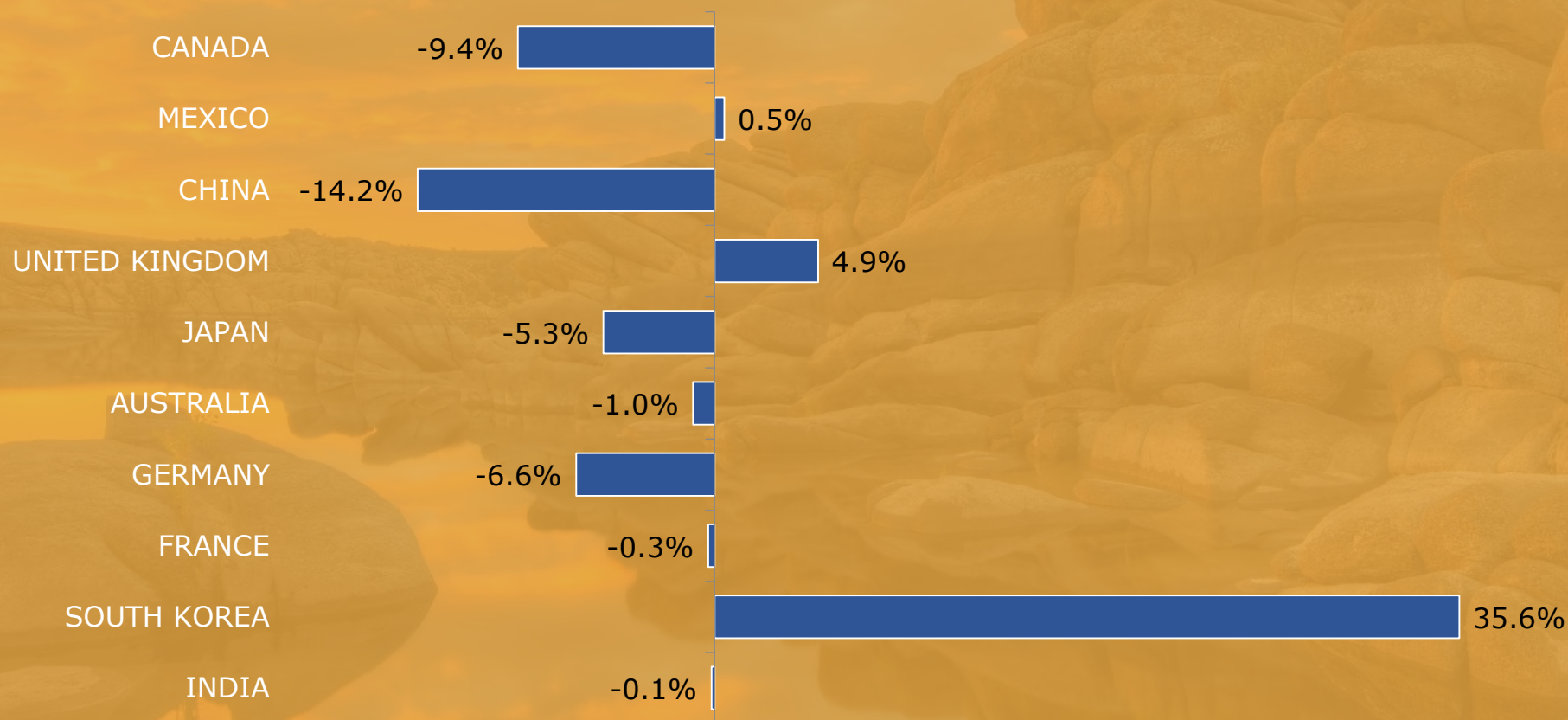
# Quarterly Domestic Visitation





# International Visa Card Spending

## Q1 (Jan-Mar 2019)







# 2019/2020 Study of Mexican Visitors to Arizona





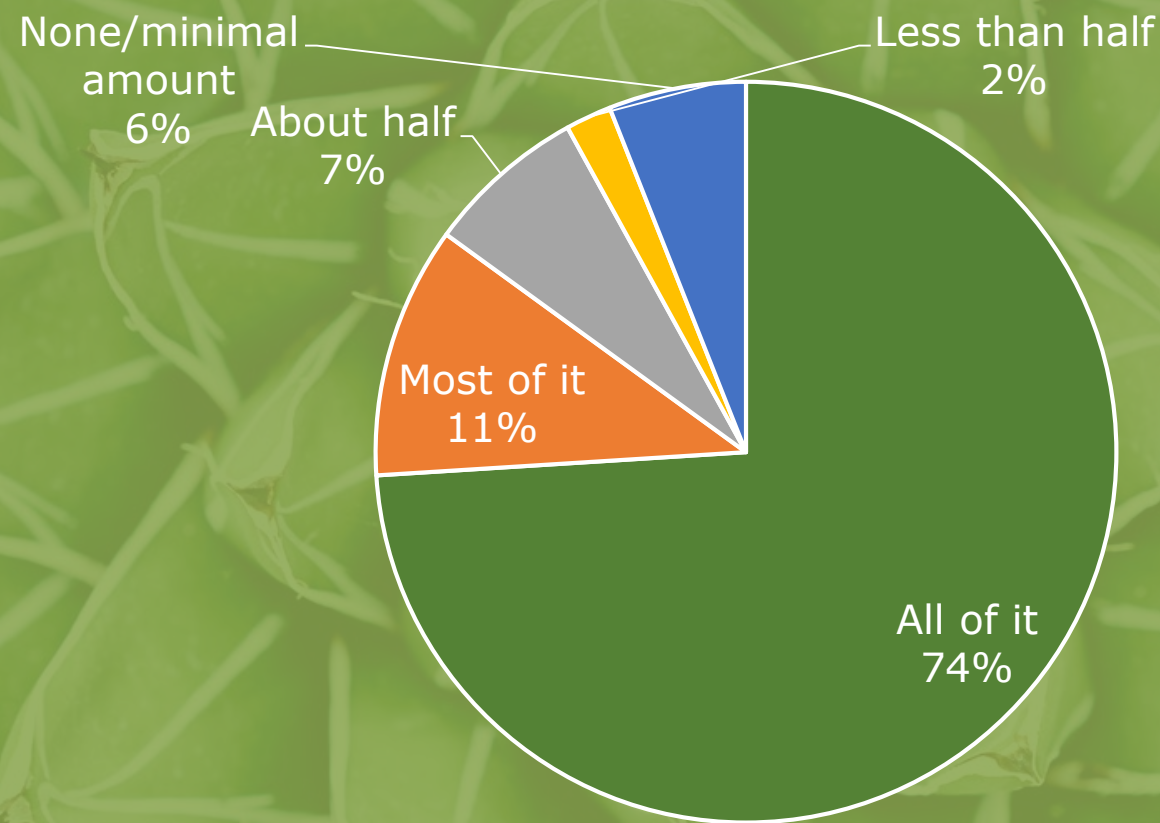
SPENDING



TRAVEL  
PATTERNS



# How much of your spending was done in cash?







Source: 2019/2020 Study of Mexican Visitors to Arizona





**Data  
Collection**

**Data Processing &  
Economic Impact  
Analysis**

**Tentative  
Report  
Delivery**

**June 2019-May 2020**

**June-  
July  
2020**

**August  
2020**