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OFFICE OF TOURISM

# Arizona Travel Impacts & Portrait of the Arizona Traveler

June 22, 2015

tourism.az.gov

## Arizona Statewide Data

Direct Travel Spending
Overnight Visitation Volume
Visitor Portrait

## Travel Industry Indicators

2014 Recap
2015 YTD

## Planning

AOT Partners
Target Markets
OTA Search and Book Trends
Campaign Research
Case Studies

## Regional Data

Direct Travel Spending
Overnight Visitation
Visitor Portrait
Regional Indicators

# Arizona Travel Industry Performance

## 2014

**40.7 million**

Overnight Visitors

Up 4.1% YOY

**$20.9 billion**

Direct Spending

Up 5.4% YOY

Source: Dean Runyan Associates, Tourism Economics

# $20.9 billion of direct spending in Arizona generated...

## $5.9 billion
employment earnings

Up 6.3% YOY

## 171,500
industry jobs

Up 3.8% YOY

## $2.8 billion
federal, state and local tax revenue

Up 2.8% YOY

Source: Dean Runyan Associates, 2014

# Direct Travel Spending in Arizona

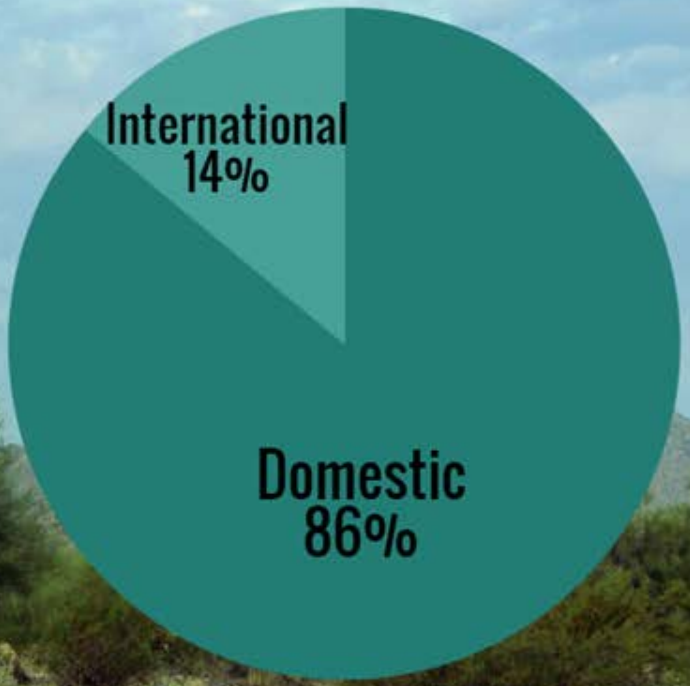
Source: Dean Runyan Associates, 2014

# Gross Domestic Product in Arizona

## Export-Oriented Industries

Source: Dean Runyan Associates, 2014

# Total Overnight Visitation to Arizona




## 2014

**Total Visitation:**
40.7 million
↑ 4.1% YOY

**Domestic Visitation:**
35.0 million
↑ 3.7% YOY

**International Visitation:**
5.7 million
↑ 6.3% YOY

Source: Tourism Economics, Longwoods International 2014

# 2014 Domestic Visitation

Visitation Volume
Visitor Portraits

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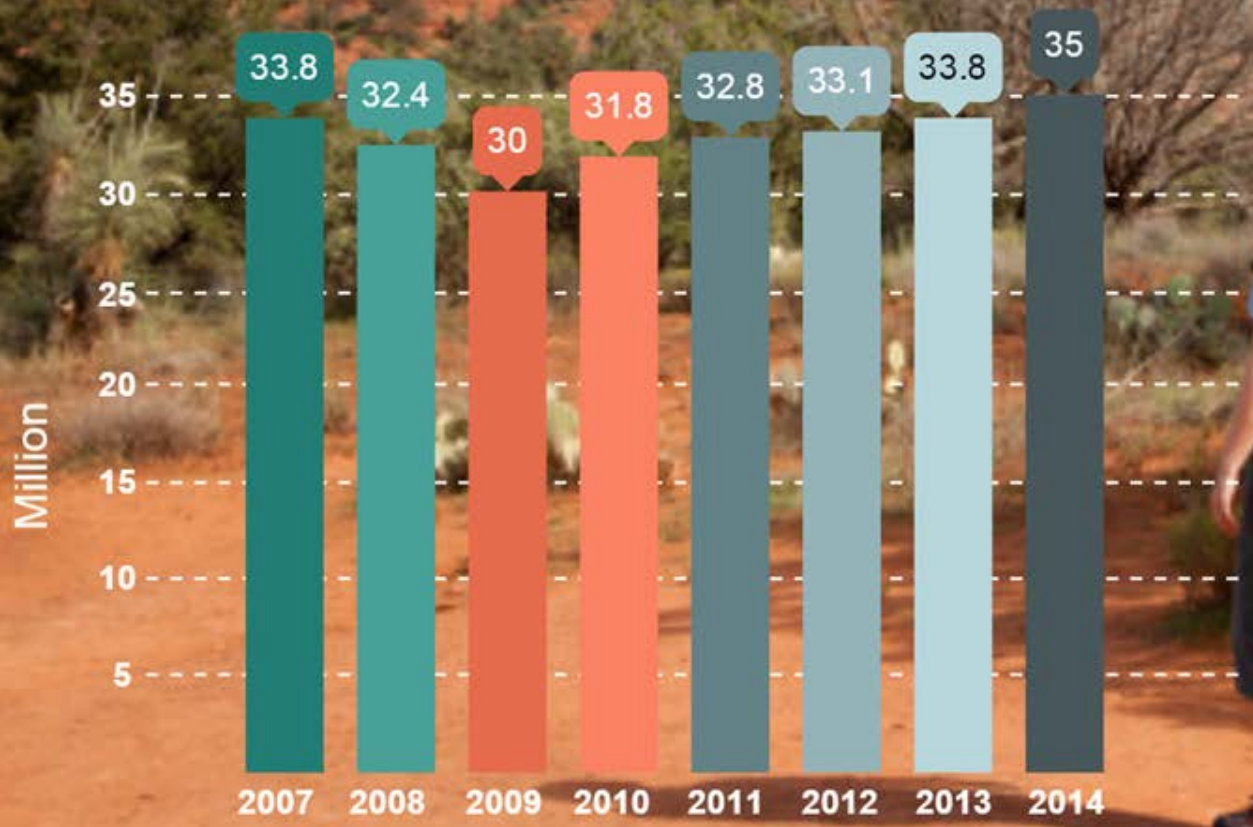
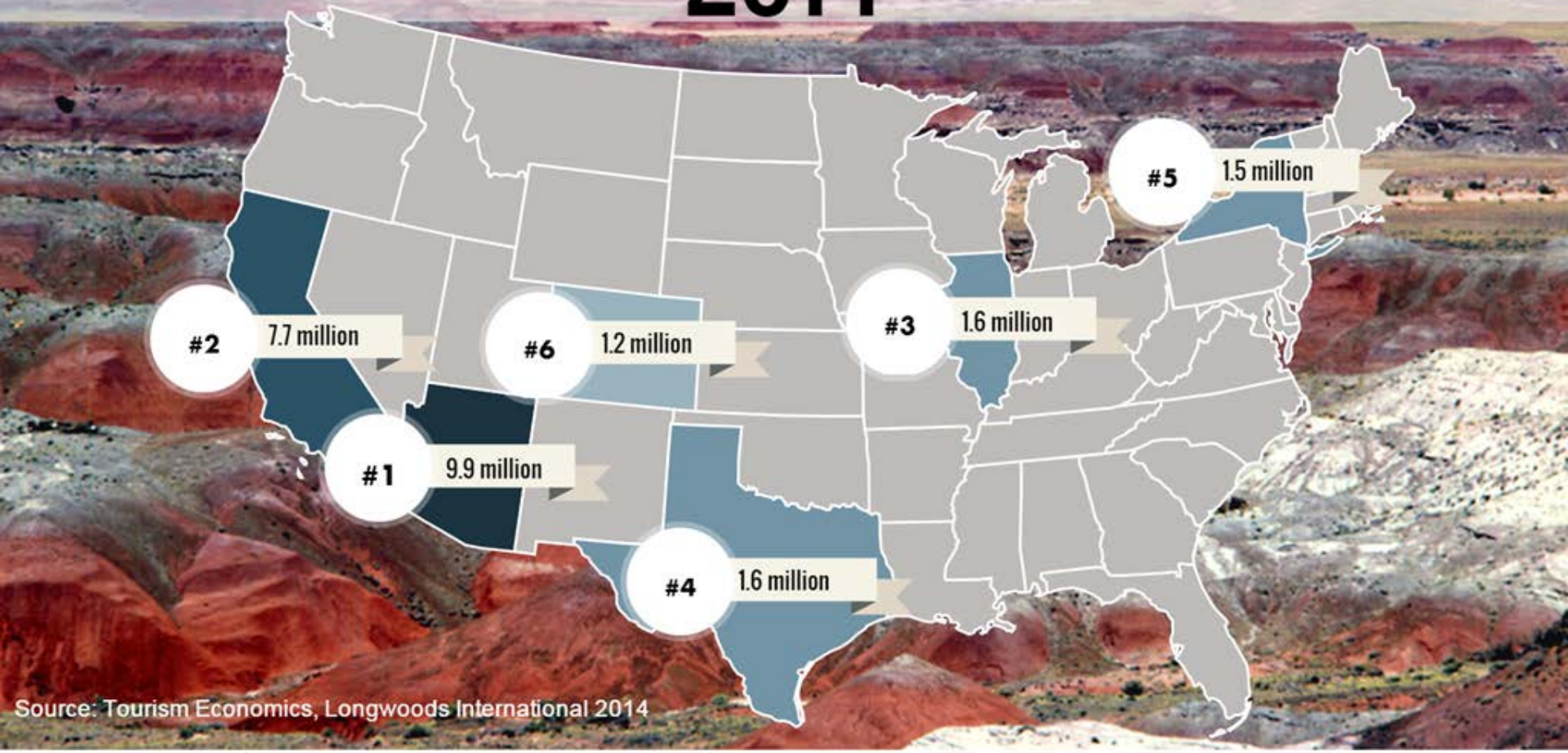
# Total Domestic Overnight Visitation to Arizona




↑ 3.6% compared to 2007

Source: Tourism Economics, Longwoods International 2014

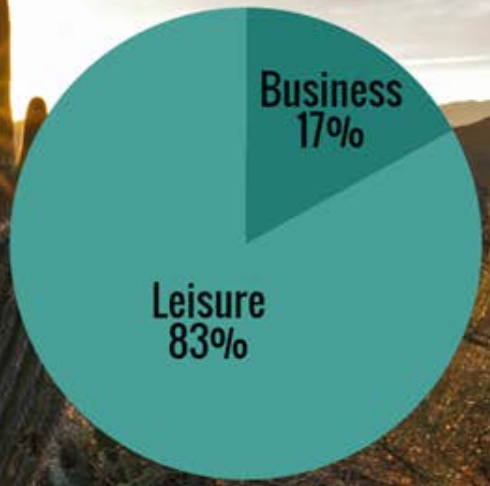
# Domestic Overnight Visitation 2014




Source: Tourism Economics, Longwoods International 2014

1. Arizona 9.9 M
2. California 7.7 M
3. Illinois 1.6 M
4. Texas 1.6 M
5. New York 1.5 M
6. Colorado 1.2 M

# Domestic Overnight Visitation to Arizona by Type




Source: Longwoods International, 2014

# Arizona Domestic Overnight Visitor Portrait

| | |
|---|---|
| 3.7 | nights |
| 2.9 | persons per party |
| $651 | trip expenditures* |
| 71% | paid accommodations |
| $70,380 | average household income |
| 45.1 | average age |

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Domestic Overnight Visitor Portrait

## Resident

| | |
|---|---|
| 2.5 | nights |
| 2.8 | persons per party |
| $397 | trip expenditures* |
| 67% | paid accommodations |
| $58,750 | average household income |
| 44.9 | average age |

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Domestic Overnight Visitor Portrait

# Non-Resident

| | |
|---|---|
| 4.3 | nights |
| 2.9 | persons per party |
| $767 | trip expenditures* |
| 72% | paid accommodations |
| $75,160 | average household income |
| 45.1 | average age |

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Domestic Overnight Visitor Portrait

## Leisure

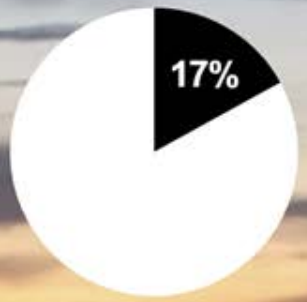
| | |
|---|---|
| 3.7 | nights |
| 2.9 | persons per party |
| $623 | trip expenditures* |
| 69% | paid accommodations |
| $68,090 | average household income |
| 44.7 | average age |

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Domestic Overnight Visitor Portrait

## Business

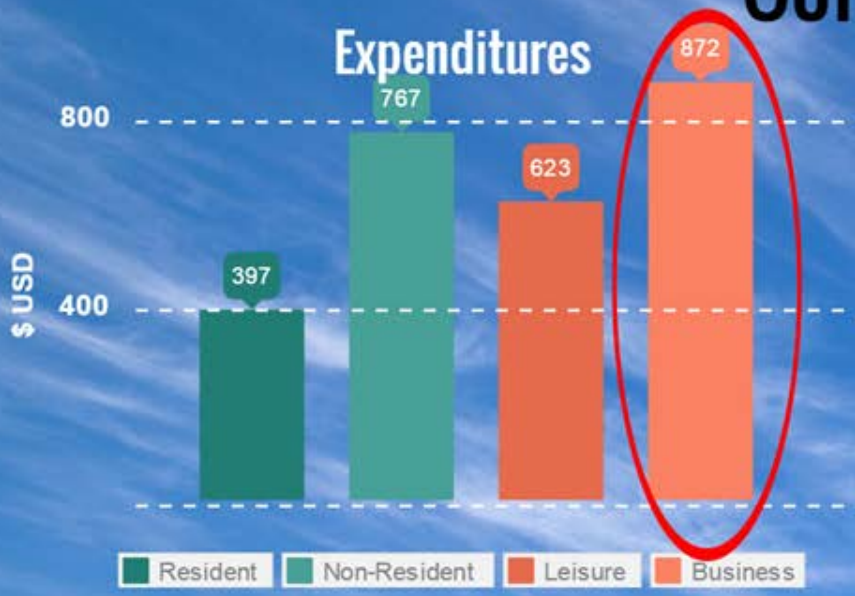


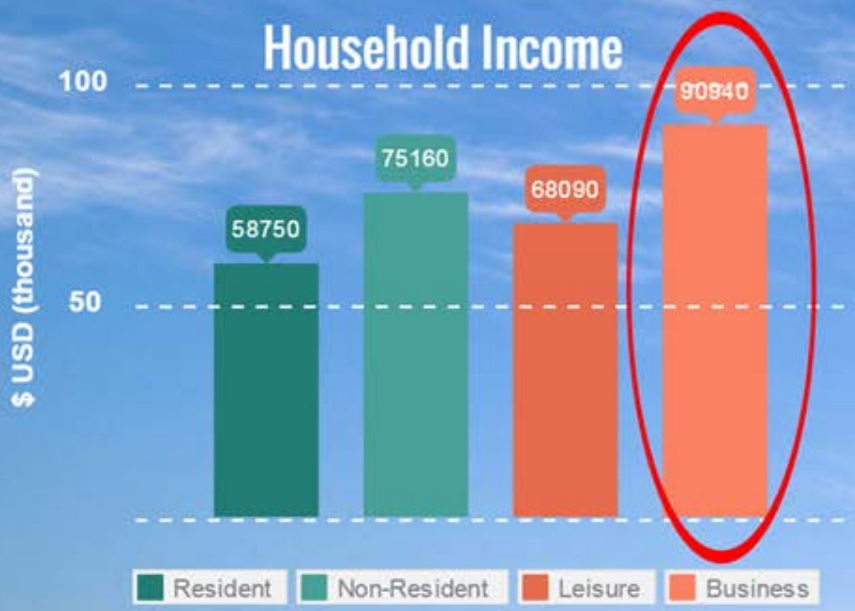

| | |
|---|---|
| 3.3 | nights |
| 2.2 | persons per party |
| $872 | trip expenditures* |
| 86% | paid accommodations |
| $90,940 | average household income |
| 46.9 | average age |

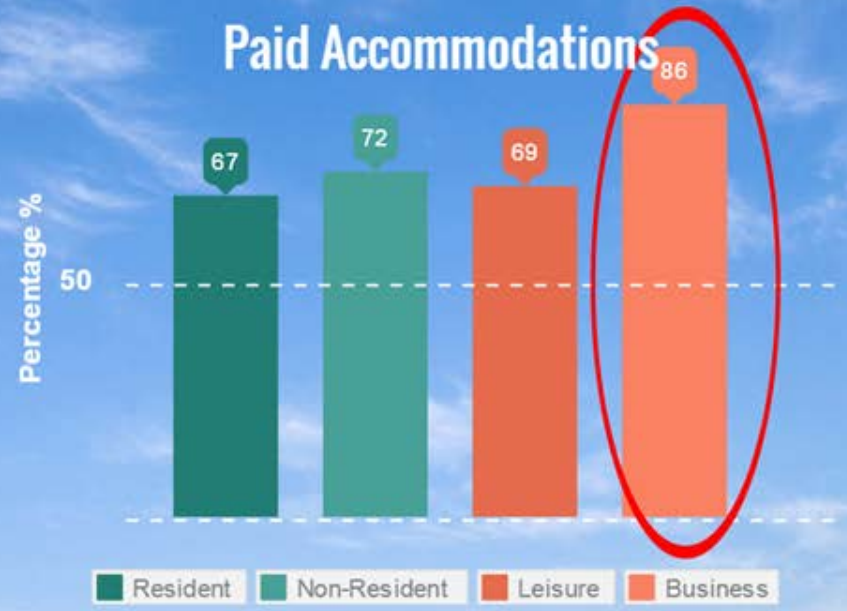
Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Domestic Overnight Visitor Portrait Comparisons





# 2014 International Visitation

Visitation Volume
Visitor Portrait

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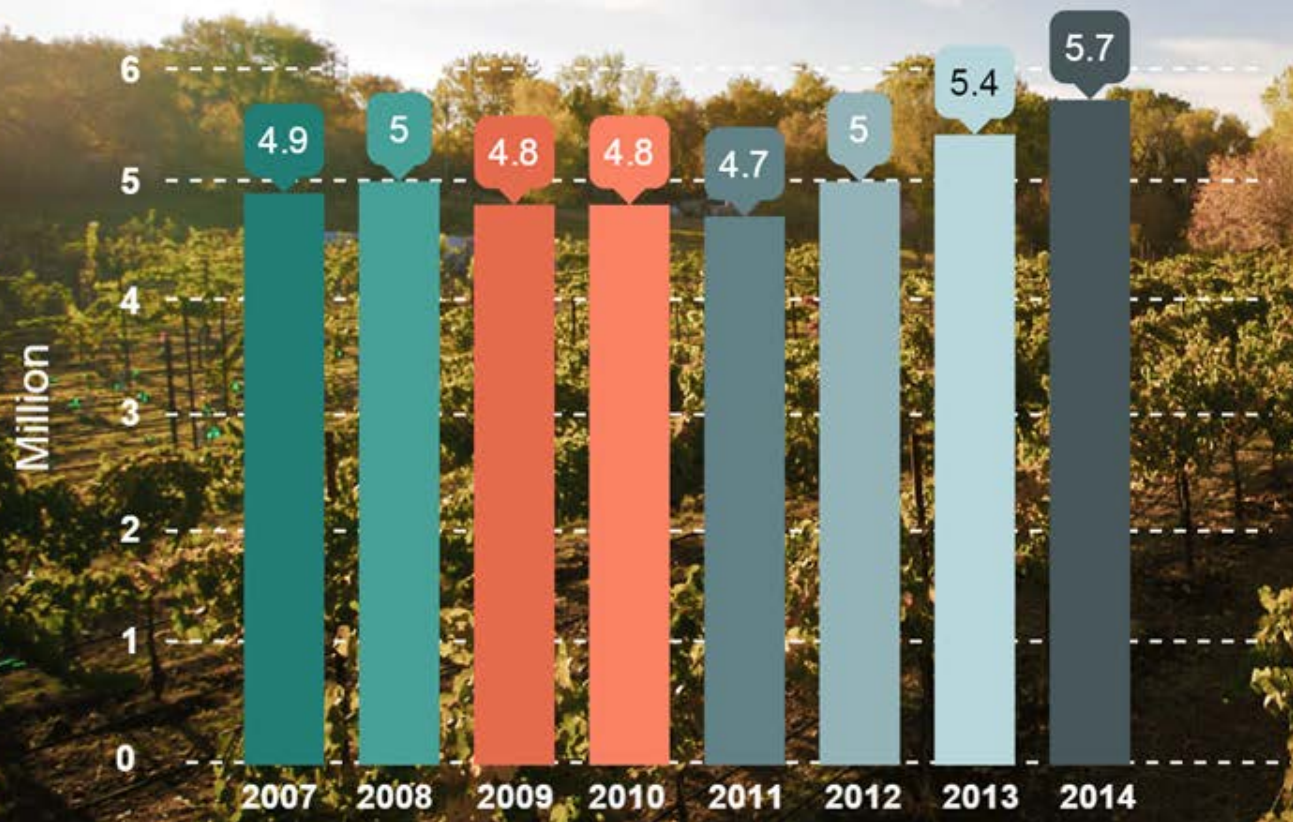
# International Overnight Visitation to Arizona




↑13.8% compared to 2008

Source: Tourism Economics, 2014

# International Overnight Visitation to Arizona

| | | | | | |
|---|---|---|---|---|---|
| 1. Mexico | 3.8 million | 5. France | 113,385 | 9. Australia | 47,535 |
| 2. Canada | 896,467 | 6. S. Korea | 54,015 | 10. Switzerland | 36,554 |
| 3. Germany | 127,705 | 7. China | 52,105 | 11. Brazil | 30,992 |
| 4. United Kingdom | 116,542 | 8. Japan | 51,602 | 12. Other overseas | 321,878 |

Source: Tourism Economics, 2014

# International Overnight Visits to Arizona % Change

| International Overnight Visits to Arizona | | | | |
|---|---|---|---|---|
| | 2011 | 2012 | 2013 | 2014 |
| Mexico | -4.6% | 6.8% | 7.8% | 6.0% |
| Canada | 8.3% | 3.4% | 16.8% | 5.4% |
| Germany | 2.9% | 0.2% | -0.2% | 6.4% |
| United Kingdom | -6.2% | -4.9% | -2.4% | 2.1% |
| France | 13.3% | -2.9% | -1.0% | 7.1% |
| Korea Republic of | -4.1% | 10.3% | 19.5% | 2.4% |
| China | 19.2% | 24.0% | 18.4% | 42.0% |
| Japan | 9.9% | 4.5% | 4.4% | 5.1% |
| Australia | 7.8% | 4.1% | -4.6% | 8.7% |
| Switzerland | 9.8% | -6.0% | -6.3% | 6.3% |
| Brazil | 13.0% | 17.4% | 3.6% | 10.8% |
| Other Overseas | 6.8% | 0.2% | 0.2% | 8.7% |
| Overseas Total | 5.2% | 0.9% | 1.1% | 8.1% |
| Total International | -1.2% | 5.2% | 7.9% | 6.3% |

Source: Tourism Economics, 2014

# Arizona Overseas Overnight Visitor Portrait

| | |
|---|---|
| 6.3 | nights |
| 3.6 | persons per party |
| $4,228 | trip expenditures* |
| 78% | paid accommodations |
| $93,337 | average household income |
| 41.6 | average age |

Source: U.S. Department of Commerce, National Travel and Tourism Office (NTTO)

*Does not include transportation to and from destination

# Tourism Indicators

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# Arizona
# 2014 Indicator Performance

## Lodging

**61.1%**
Occupancy
Up 4.5% YOY

**$104.55**
ADR
Up 4.5% YOY

**$63.92**
RevPAR
Up 9.2% YOY

Source: STR

# Arizona
# 2014 Indicator Performance

## State Parks

**2.3 million**
Total Visitors

Up 2.0% YOY

## National Parks

**12.8 million**
Recreational Visits

Up 6.8% YOY

## Airports

**47.3 million**
Passengers

Up 2.3% YOY

Source: NAU

# 2015 YTD Indicator Performance

## Lodging (as of May 2015)

**69.3%**
Occupancy
Up 4.6% compared to May 2014

**$125.80**
ADR
Up 10.0% compared to May 2014

**$87.16**
RevPAR
Up 15.0% compared to May 2014

Source: STR

# Arizona
# 2015 YTD Indicator Performance

## State Parks

↑ 14.4% compared to May 2014

## Airports

↑ 4.1% compared to April 2014

## Strong U.S. Dollar

As of June 14, 2015

↑ 21% against Euro

↑ 10% against British pound

↑ 14% against Canadian dollar

↑ 19% against Mexican peso

Source: NAU, OANDA.com

# Planning

# AOT Research Partners

VisaVue® *Travel*

# AOT's Target Life Stages

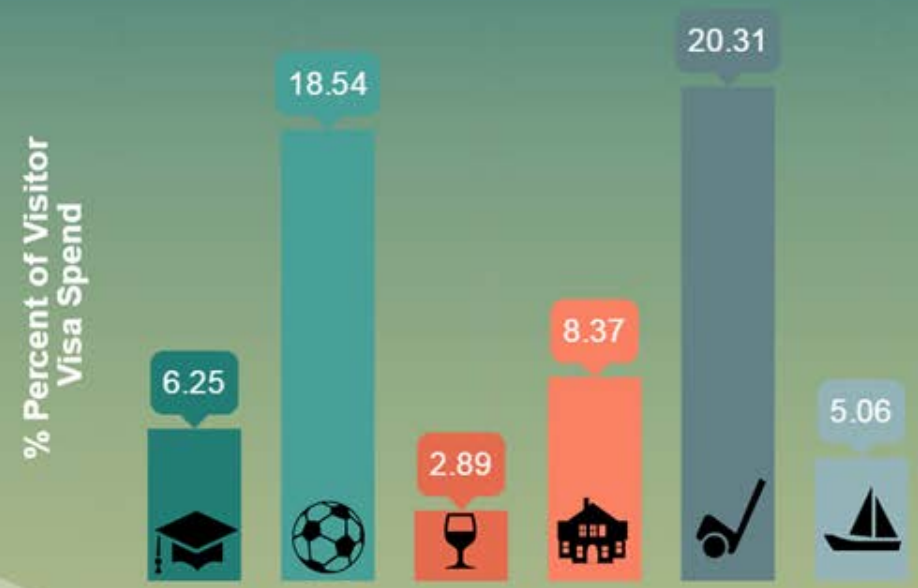
- Younger Years (no children) - $75K+
- Family Life - $100K+
- Gen X Older (no children) - $75K+
- Young Boomers (with children) - $100K+
- Young Boomers (no children) - $100K+
- Older Boomers (no children) - $100K+

**Represents 30% of all US households**

Source: AOT Research, Experian Mosaic

# Arizona Lifestage Performance

(May 2013 - April 2014)



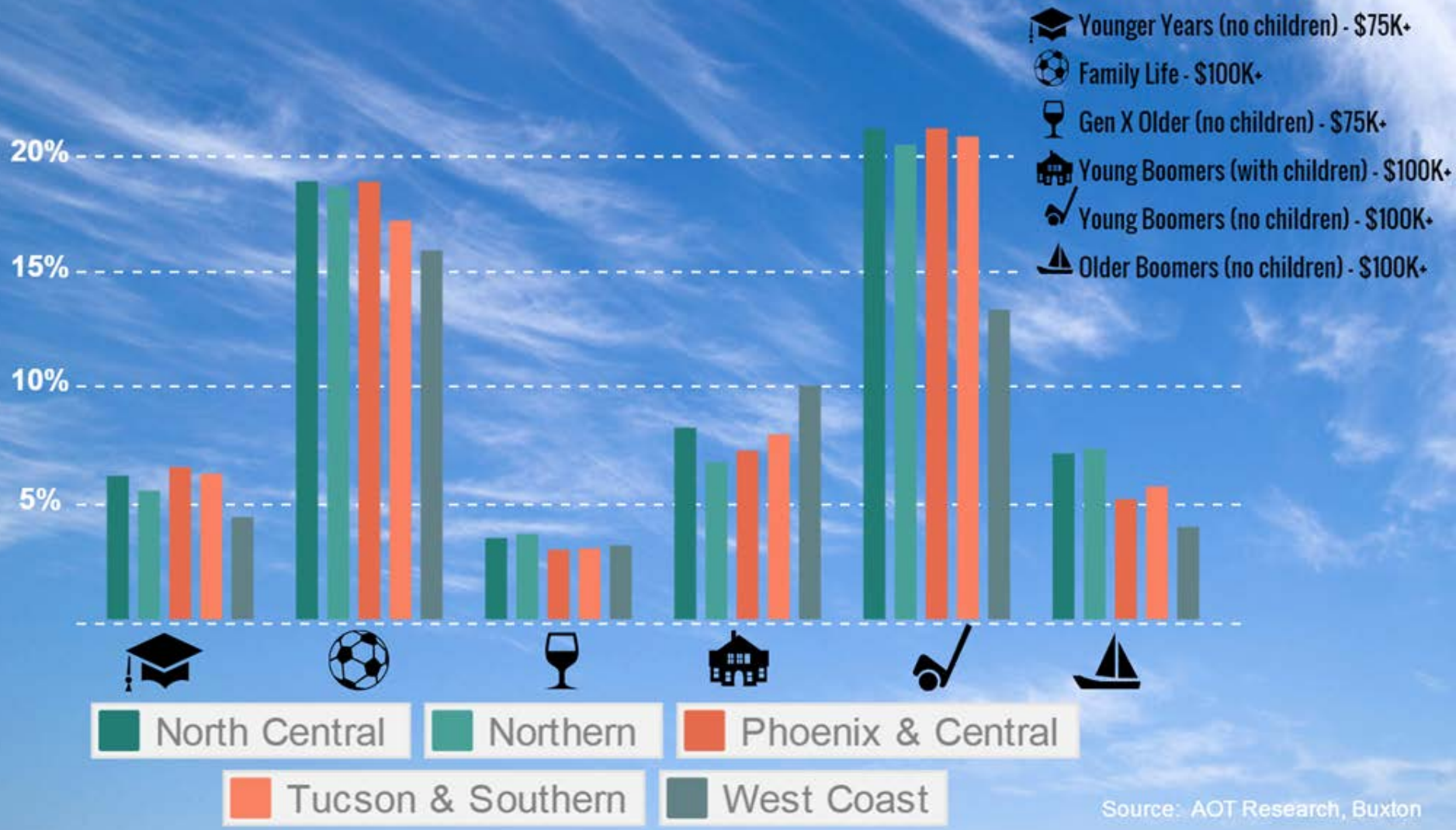

- Younger Years (no children) - $75K+
- Family Life - $100K+
- Gen X Older (no children) - $75K+
- Young Boomers (with children) - $100K+
- Young Boomers (no children) - $100K+
- Older Boomers (no children) - $100K+

Represents **61.4%** of Arizona visitors

Source: AOT Research, Buxton

# Lifestage Performance

% Percent of Visa Card Spend




Source: AOT Research, Buxton

# Lifestages and Segments

27 Experian Segments Targeted by AOT

Source: AOT Research, Experian Mosaic

# High Performing Experian Segments

## C11

## Aging of Aquarius

White collar Baby Boomers
Read print newspapers and travel magazines
Travel domestically and internationally
Casinos and Cruises

| | Rank | Percentage of Spend |
|---|---|---|
| Arizona | 1 | 8.6% |
| North Central | 1 | 9.5% |
| Northern | 1 | 9.0% |
| Phoenix & Central | 1 | 8.6% |
| Tucson & Southern | 1 | 8.7% |
| West Coast | 1 | 7.4% |

Source: Buxton, Experian Mosaic

# High Performing Experian Segments

## A02

## Platinum Prosperity

Affluent, high-powered professionals
Read in-flight, business, and culinary magazines
Travel domestically and internationally
Live theater, museums, concerts

| | Rank | Percentage of Spend |
|---|---|---|
| Arizona | 2 | 7.3% |
| North Central | 2 | 7.5% |
| Northern | 2 | 7.3% |
| Phoenix & Central | 2 | 8.3% |
| Tucson & Southern | 2 | 7.4% |
| West Coast | 7 | 3.1% |

Source: Buxton, Experian Mosaic

# High Performing Experian Segments

## A01

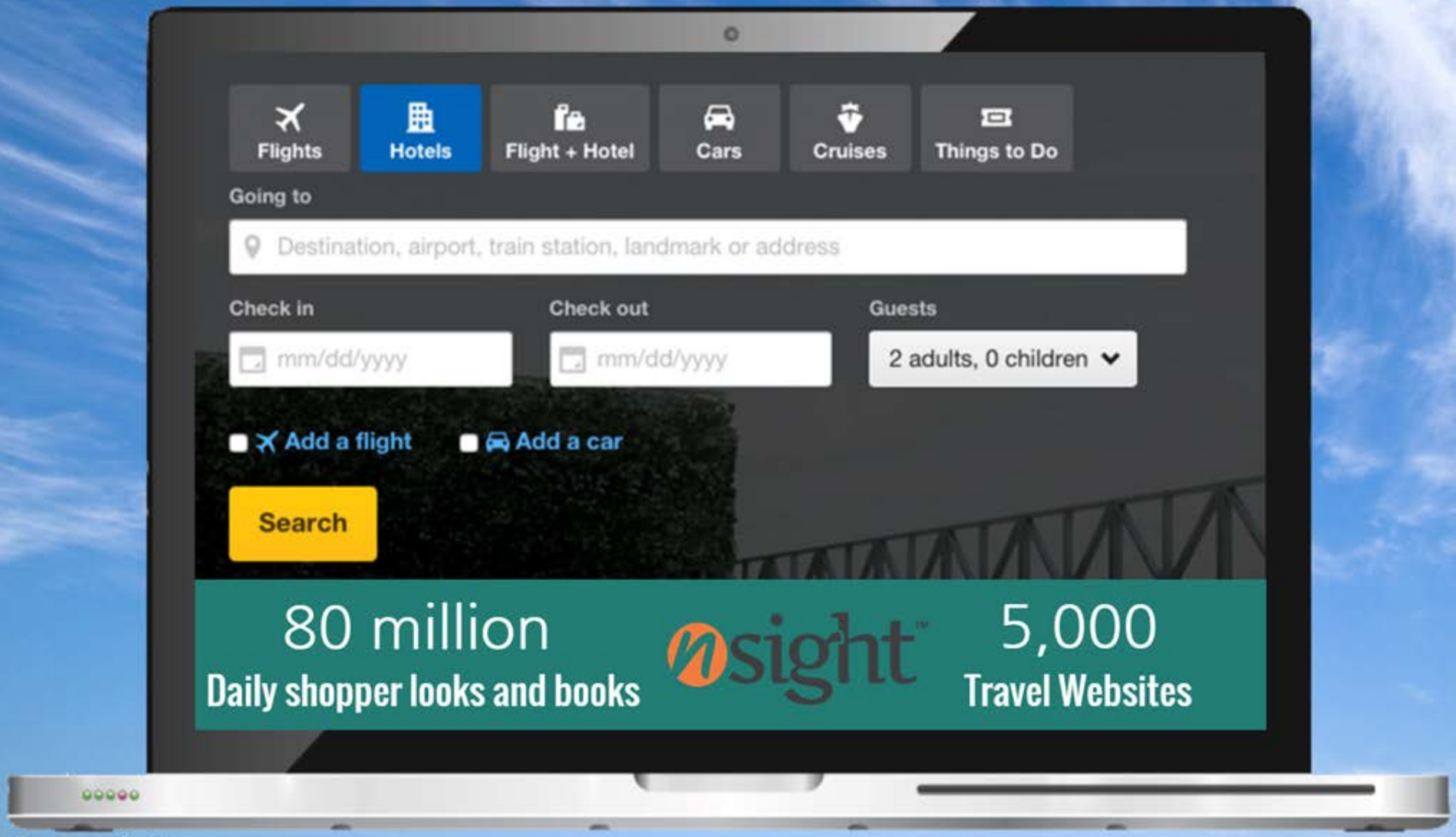
## American Royalty

Wealthiest households
Luxury
Read in-flight, business, and culinary magazines
Travel domestically and internationally
Attend sports events, golf, cycling, hiking

| | Rank | Percentage of Spend |
|---|---|---|
| Arizona | 3 | 7.3% |
| North Central | 4 | 4.2% |
| Northern | 4 | 3.8% |
| Phoenix & Central | 3 | 4.2% |
| Tucson & Southern | 3 | 4.5% |
| West Coast | 24 | 1.6% |

Source: Buxton, Experian Mosaic

# OTA Search and Book Trends



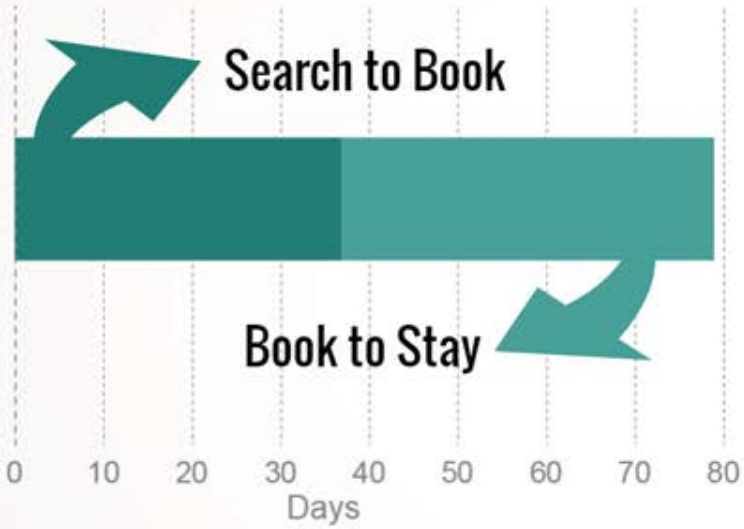

Source: nSight

# OTA Search and Book Trends for Arizona

May 2015

**23,516,731**
Searches for Arizona

**1.67%**
of U.S. Share



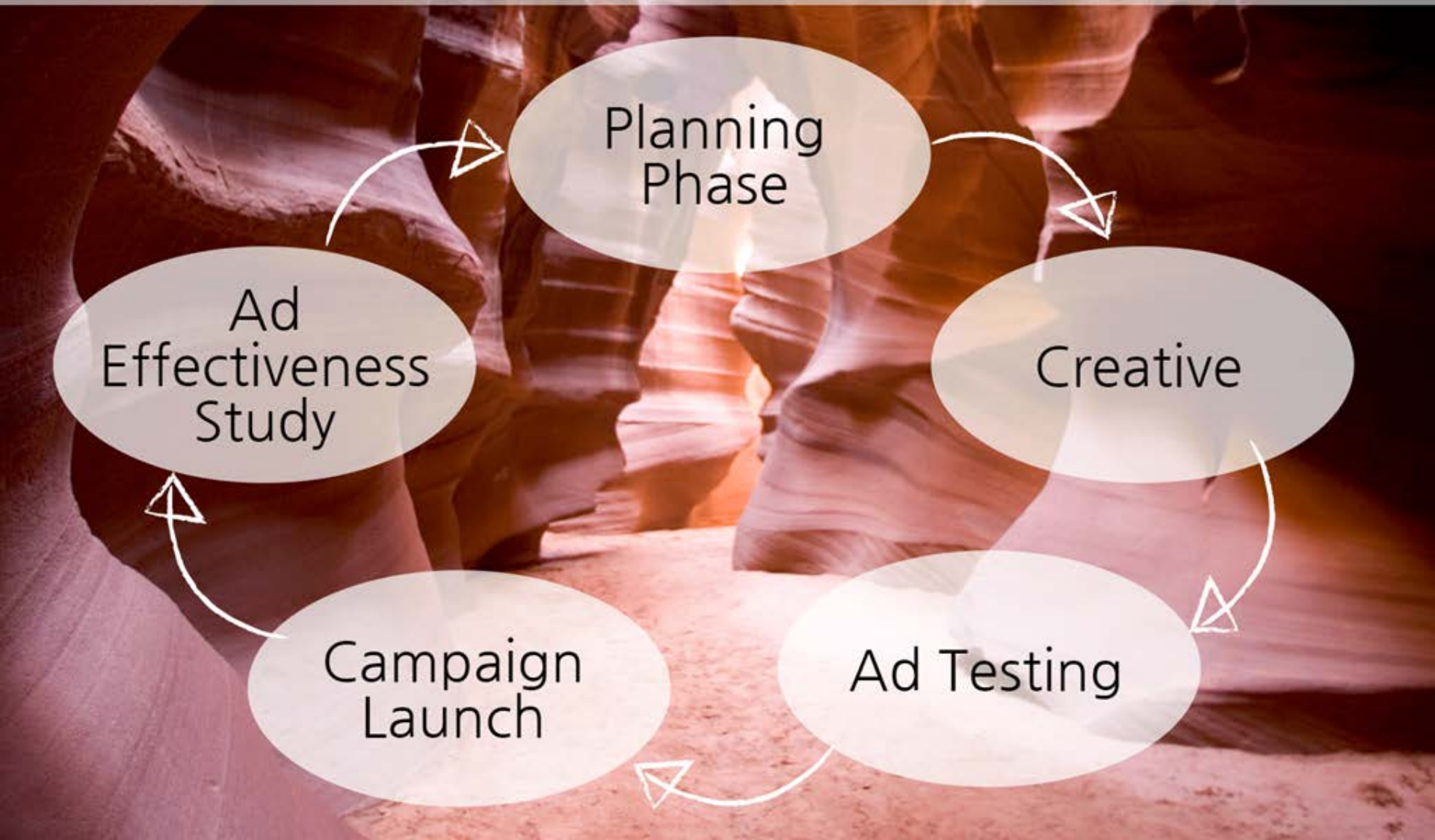

Domestic Booking Window

## Top 5 U.S. Sources

| | |
|---|---|
| Arizona | 22% |
| California | 19% |
| New York | 7% |
| Texas | 5% |
| Illinois | 4% |

Source: nSight

# AOT National Campaign Cycle



# AOT Target Cities Analysis

Inputs are then weighted and sorted into categories...

Visitation and Engagement
Propensity to Travel
Economy in Market
Mobility
Influence of Media in Market

= Index Score

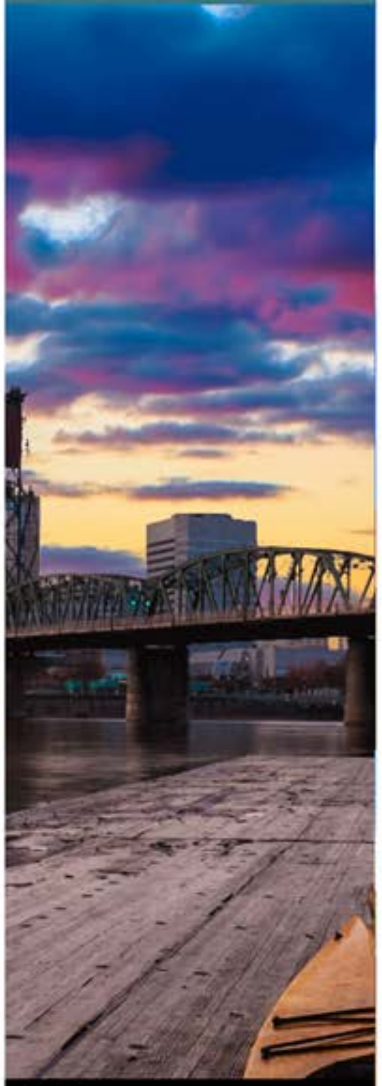
| Rank | City | Score |
|---|---|---|
| 1 | Seattle, WA - Tacoma, WA | 124.89 |
| 2 | Minneapolis, MN | 124.80 |
| 3 | Chicago, IL | 121.36 |
| 4 | Austin, TX | 119.48 |
| 5 | San Diego, CA | 119.37 |
| 6 | Dallas, TX – Ft. Worth, TX | 118.95 |
| 7 | Portland, OR | 118.85 |
| 8 | San Francisco, CA - Oakland, CA - San Jose, CA | 117.73 |
| 9 | Houston, TX | 117.49 |
| 10 | Denver, CO | 117.11 |

AOT then chooses Target Cities based on the agency's budget, city ranking, internal and external stakeholder preferences, and other factors...

Chicago, IL

Seattle, WA

Minneapolis, MN

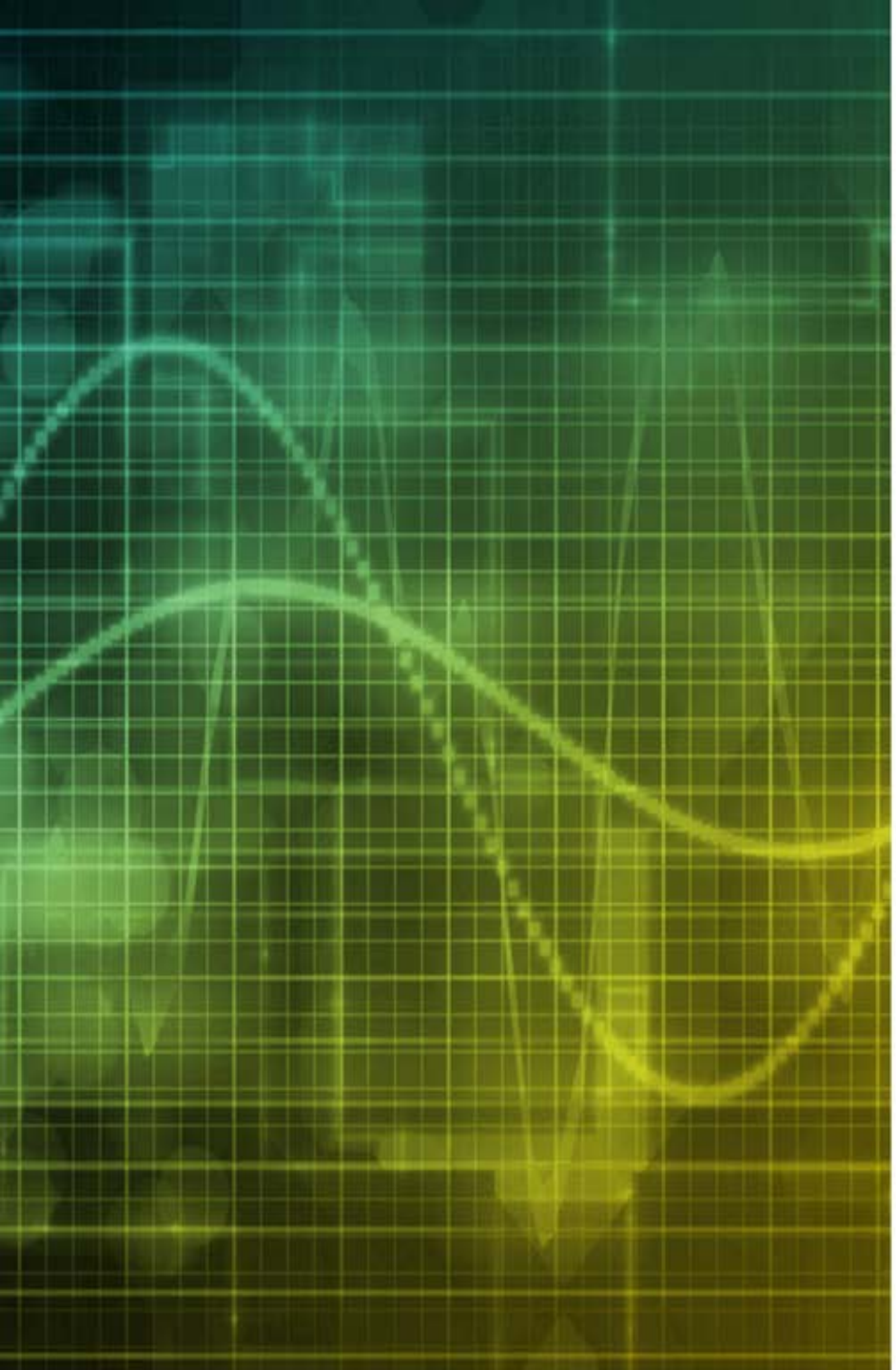


Portland, OR

Austin, TX

Full Campaign

Digital Only

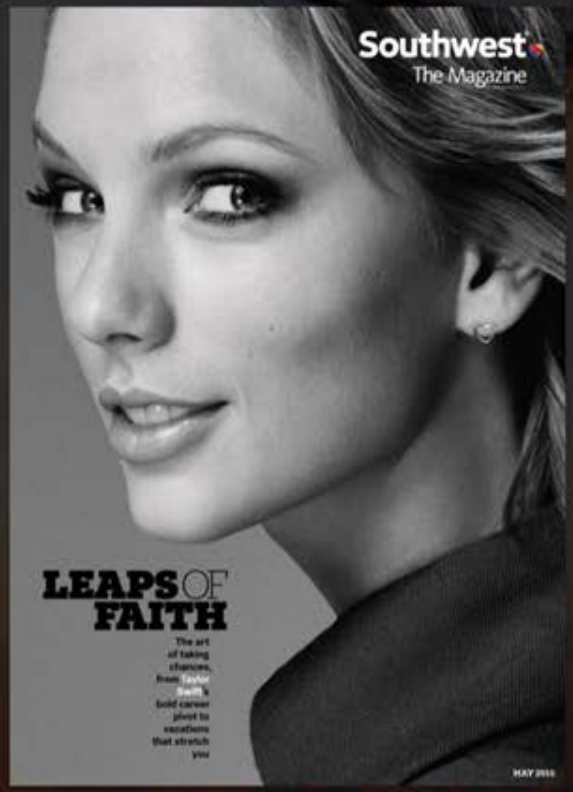


# AOT
# Case Studies

# In-flight Magazine Ad Purchase

Circulation: 850,000

Cost of full-page ad:
$36,000



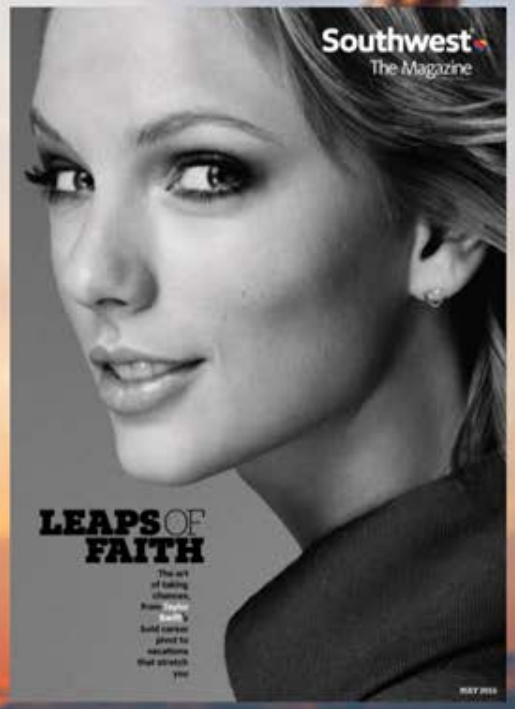

Circulation: 450,428

Cost of full-page ad:
$28,000

# In-flight Magazine Ad Purchase

## Co-Op Target Markets:

Austin
Chicago
Las Vegas
Los Angeles
San Diego
Seattle



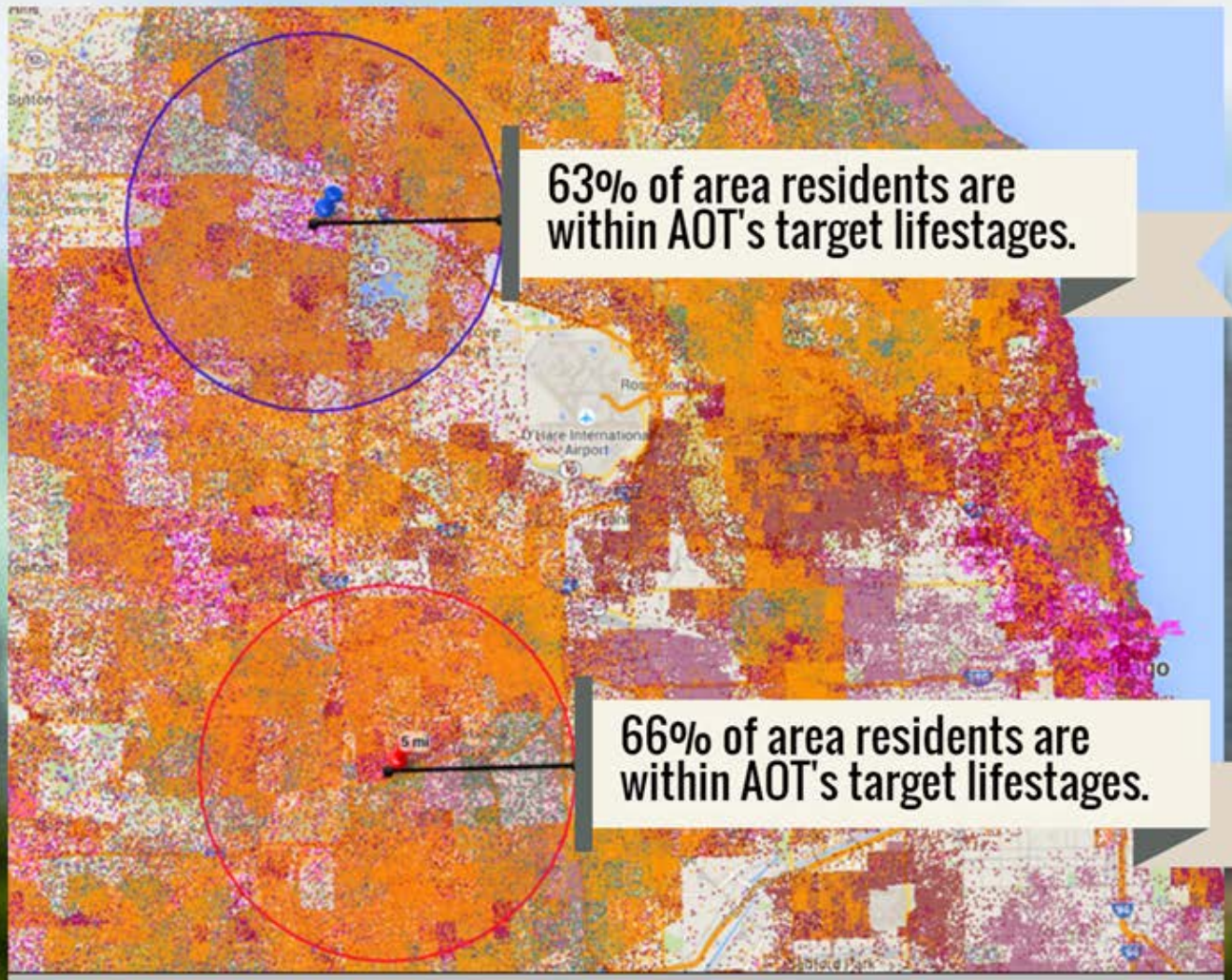

Of the two airlines, Southwest carried 61% of passengers from target markets to Phoenix in 2014.

Source: Diio

# Chicago Activation Site Location Analysis

## Two potential locations:

# Chicago Activation Site Location Analysis




**Key:**

Younger Years = Pink
Family Life = Orange
Young Boomers w/ C = Purple
Young Boomers NC = Brown
Older Boomer NC = Green

Page Springs Cellars

London Bridge

Winslow

# Regional Profiles

Musical Instrument Museum

San Xavier del Bac

# Northern Region

(Apache, Coconino and Navajo Counties)

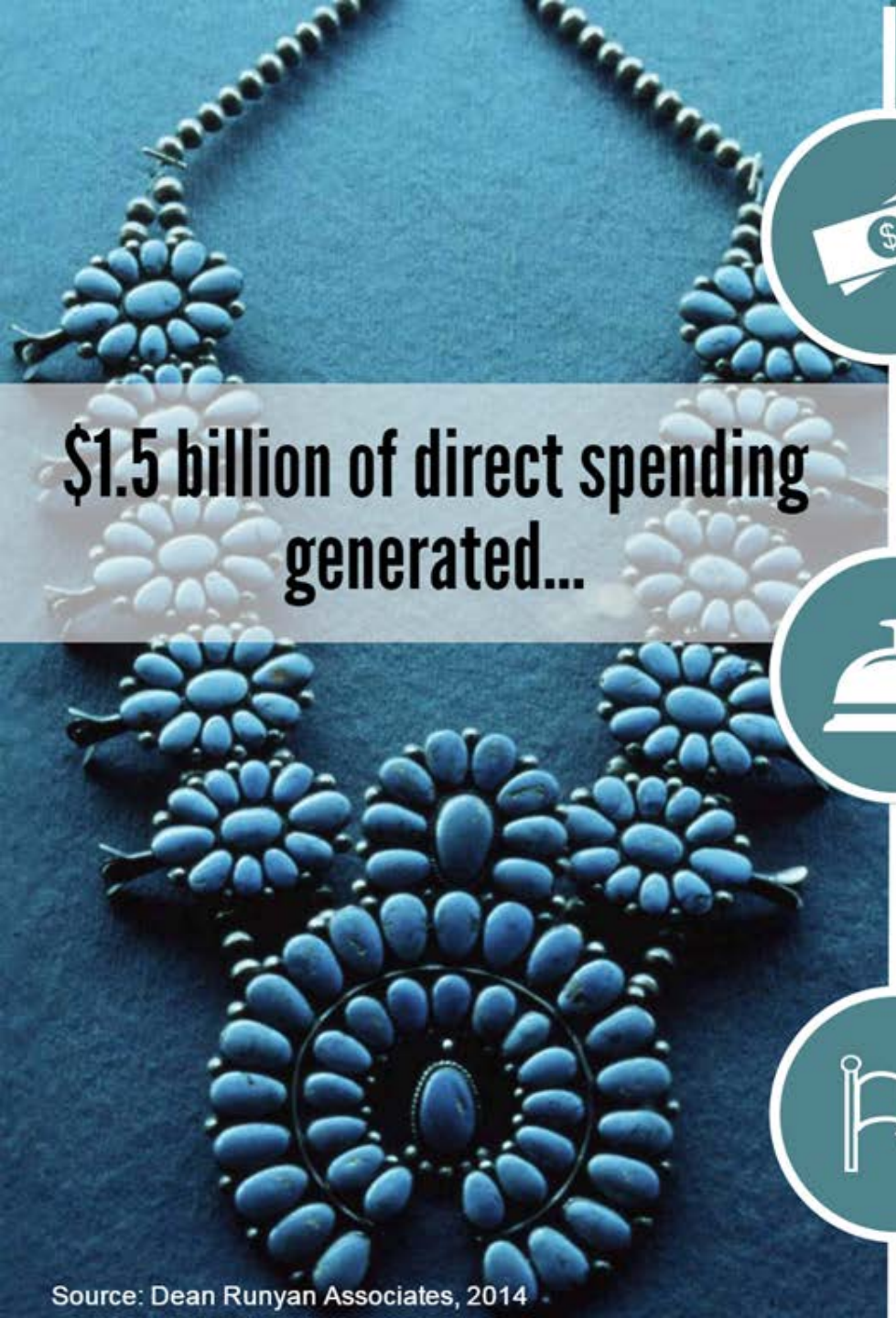
**8.0 million**

Domestic Overnight Visitors

**$1.5 billion**

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics



# $1.5 billion of direct spending generated...

## $431 million

employment earnings

Up 4.1% YOY

## 16,800

industry jobs

Up 1.1% YOY

## $126 million

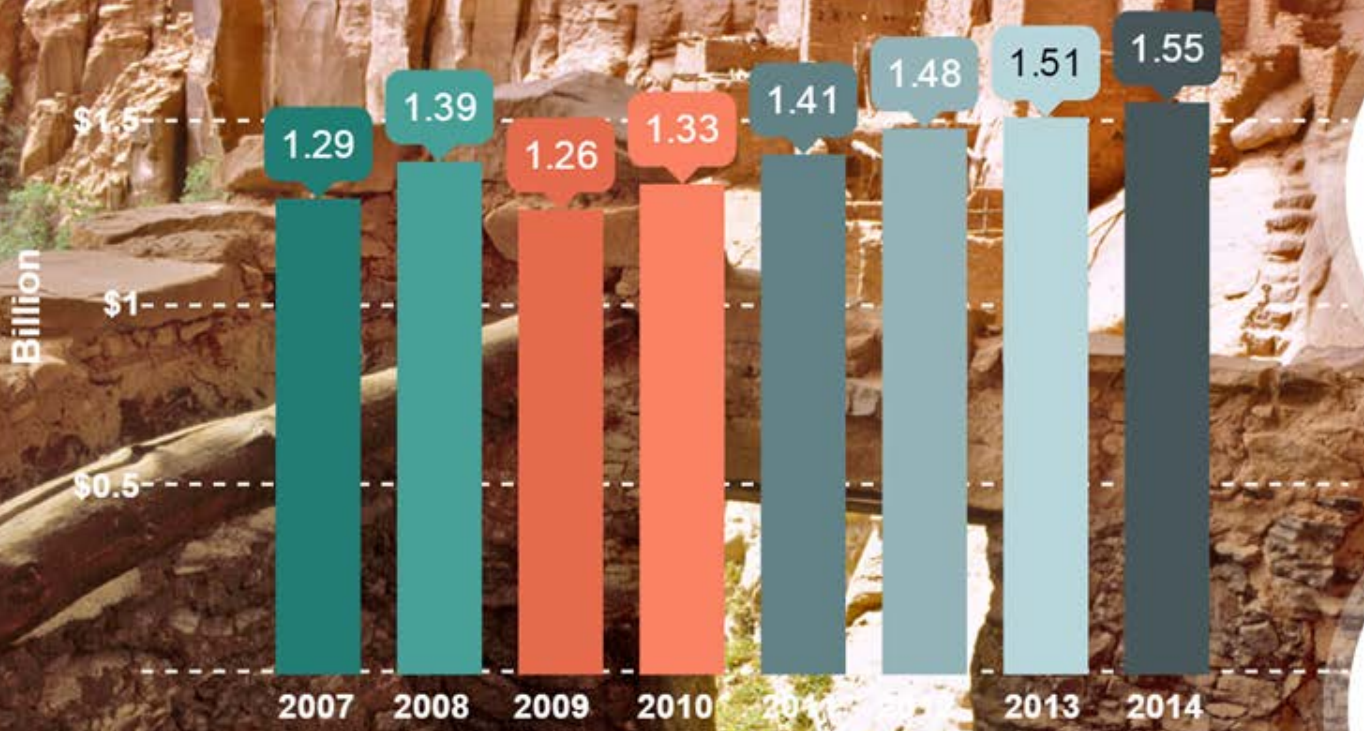
state and local tax revenue

Down* -2.3% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

# Direct Travel Spending in Northern Region



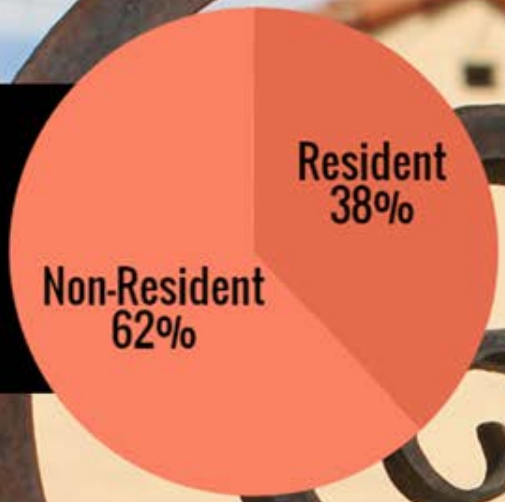

**2.8%**
YOY

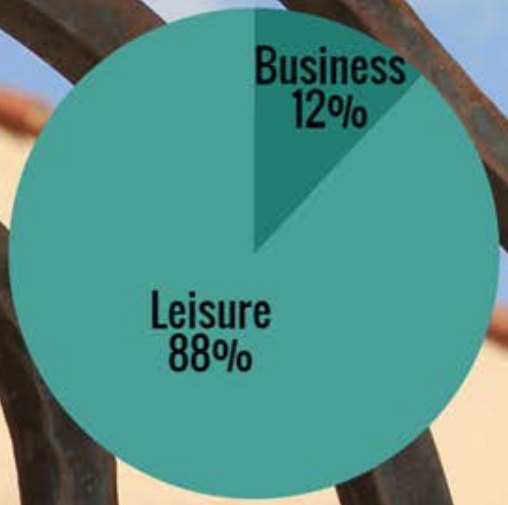
**20.2%**
Compared to 2007

Source: Dean Runyan Associates, 2014

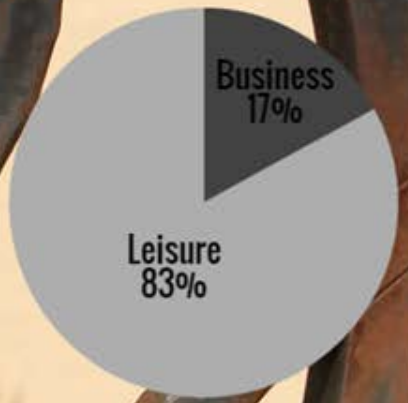
# Domestic Overnight Visitation to Northern Region

## Northern Region




## Arizona




Source: Longwoods International, 2014

# Northern Region Domestic Overnight Visitor Portrait

| | |
|---|---|
| 3.3 | nights |
| 3.1 | persons per party |
| $644 | trip expenditures* |
| 78% | paid accommodations |
| $68,430 | average household income |
| 42.7 | average age |

## Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Hiking/Backpacking

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Northern Region
# 2014 Indicator Performance

## Lodging

**58.8%**
Occupancy
Up 3.6% YOY

**$86.02**
ADR
Up 3.2% YOY

**$51.53**
RevPAR
Up 7.7% YOY

Source: STR

# Northern Region
# 2014 Indicator Performance

## State Parks

**285,339**
Total Visitors

Down* -27% YOY

## National Parks

**9 million**
Recreational Visits

Up 6.7% YOY

## Airports

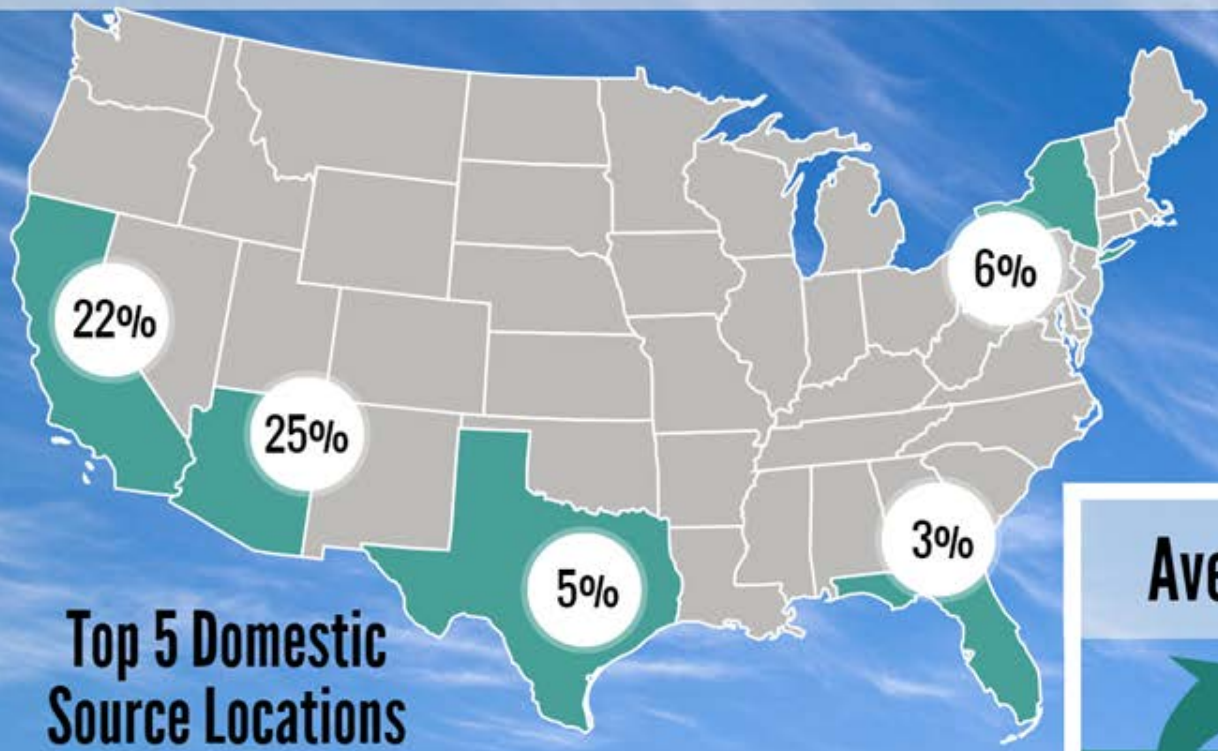
**231,944**
Passengers

Up 12% YOY

*Due to closure of Slide Rock SP after Slide Fire in Oak Creek Canyon

Source: NAU

# Northern Region
# May 2015 OTA Search & Book Trends




**22%**
Of all searches for Arizona

## Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Florida

Source: nSight

## Average Lead Time (Days)

Search to Book

Book to Stay

*For domestic travel to the Northern Region in May 2015

# West Coast Region

(La Paz, Mohave and Yuma Counties)

**5.0 million**

Domestic Overnight Visitors

**$1.4 billion**

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014

# $1.4 billion of direct spending generated...

## $315 million

employment earnings

Up 1.8% YOY

## 13,180

industry jobs

Down -0.7% YOY

## $97 million

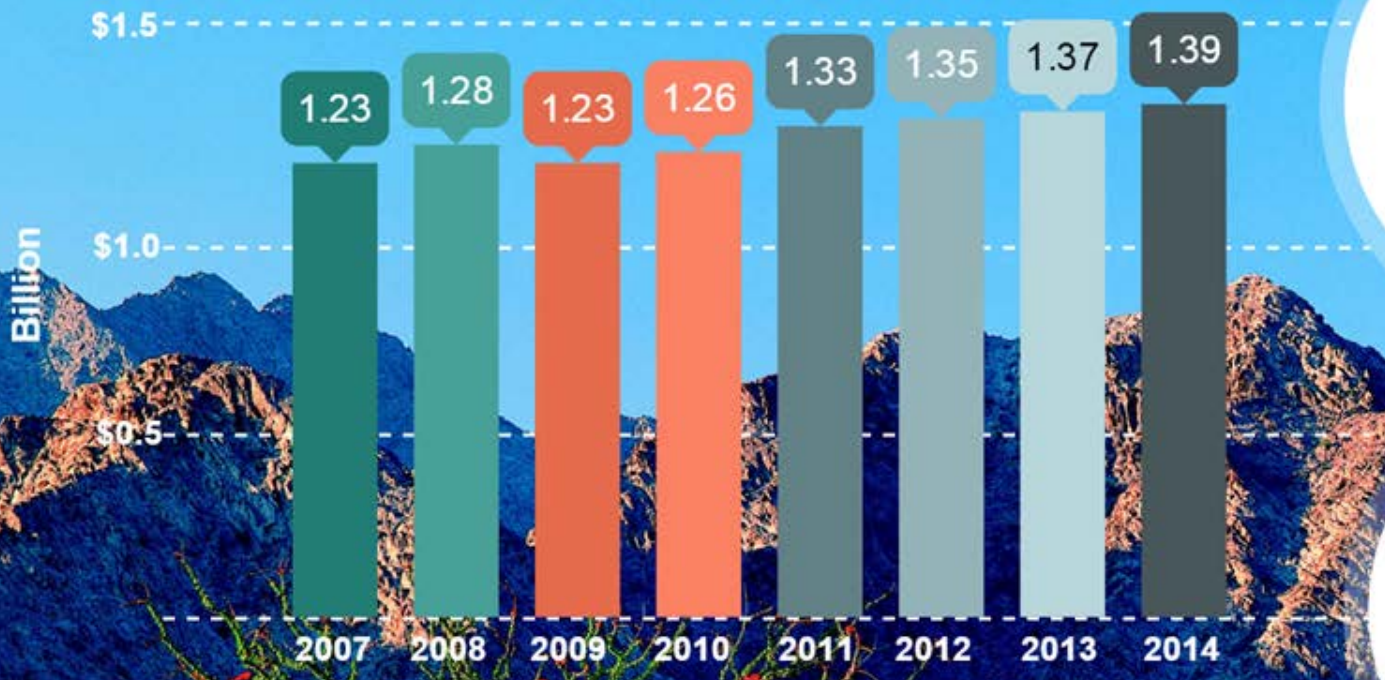
state and local tax revenues

Down* -8.5% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

# Direct Travel Spending in West Coast Region

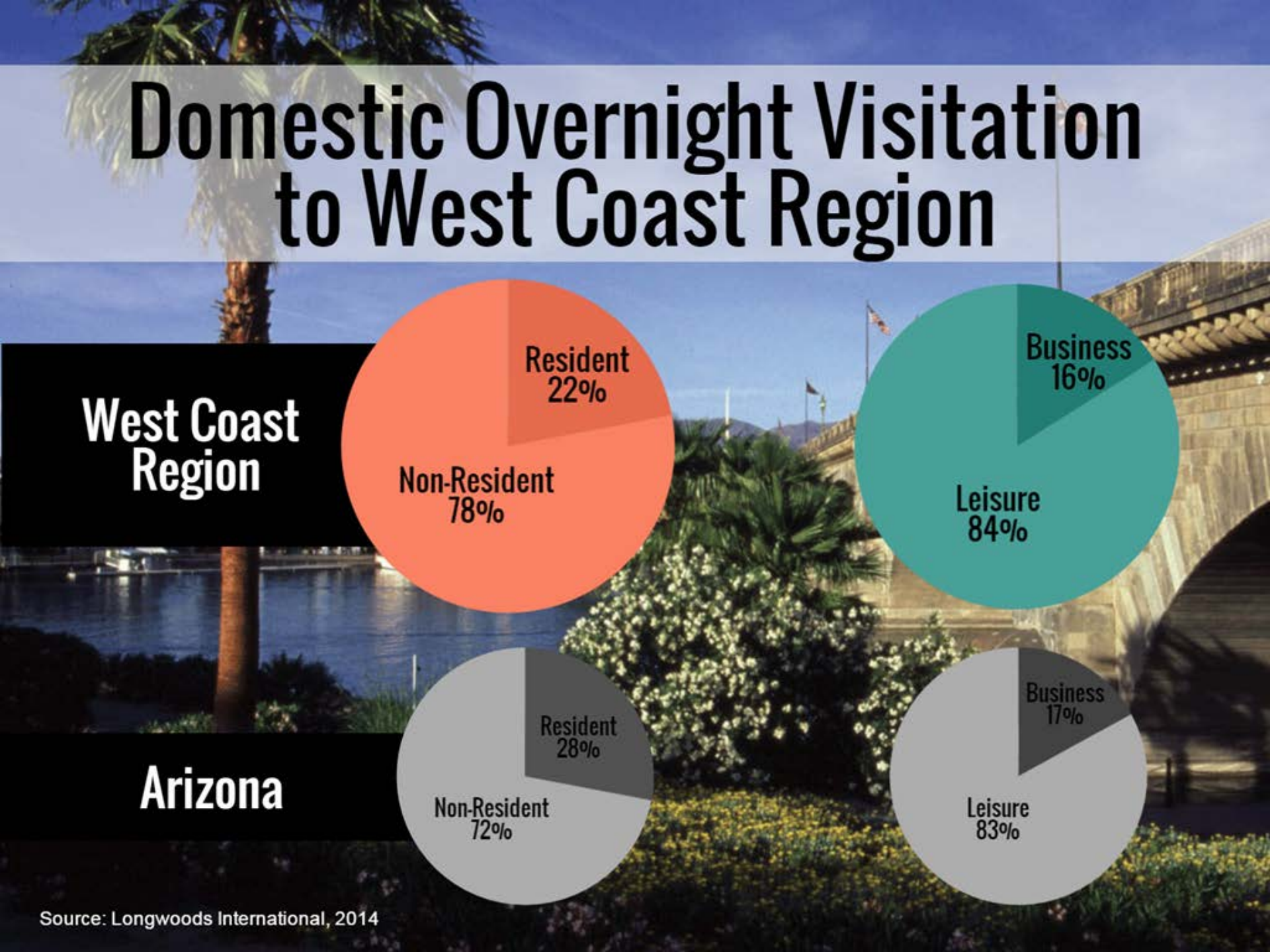



1.3%
YOY

13.0%
Compared to 2007

Source: Dean Runyan Associates, 2014

# Domestic Overnight Visitation to West Coast Region




Source: Longwoods International, 2014

# West Coast Region
# Domestic Overnight Visitor Portrait

| | |
|---|---|
| 3.3 | nights |
| 3.1 | persons per party |
| $537 | trip expenditures* |
| 78% | paid accommodations |
| $70,170 | average household income |
| 40.3 | average age |

## Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Swimming
- Casino

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# West Coast Region
# 2014 Indicator Performance

## Lodging

**53.4%**
Occupancy
Up 1.0% YOY

**$69.86**
ADR
Up 3.6% YOY

**$37.27**
RevPAR
Up 4.8% YOY

Source: STR

# West Coast Region
# 2014 Indicator Performance

## State Parks

**686,785**
Total Visitors

Up 9.8% YOY

## National Parks

**2 million**
Recreational Visits

Up 8.5% YOY

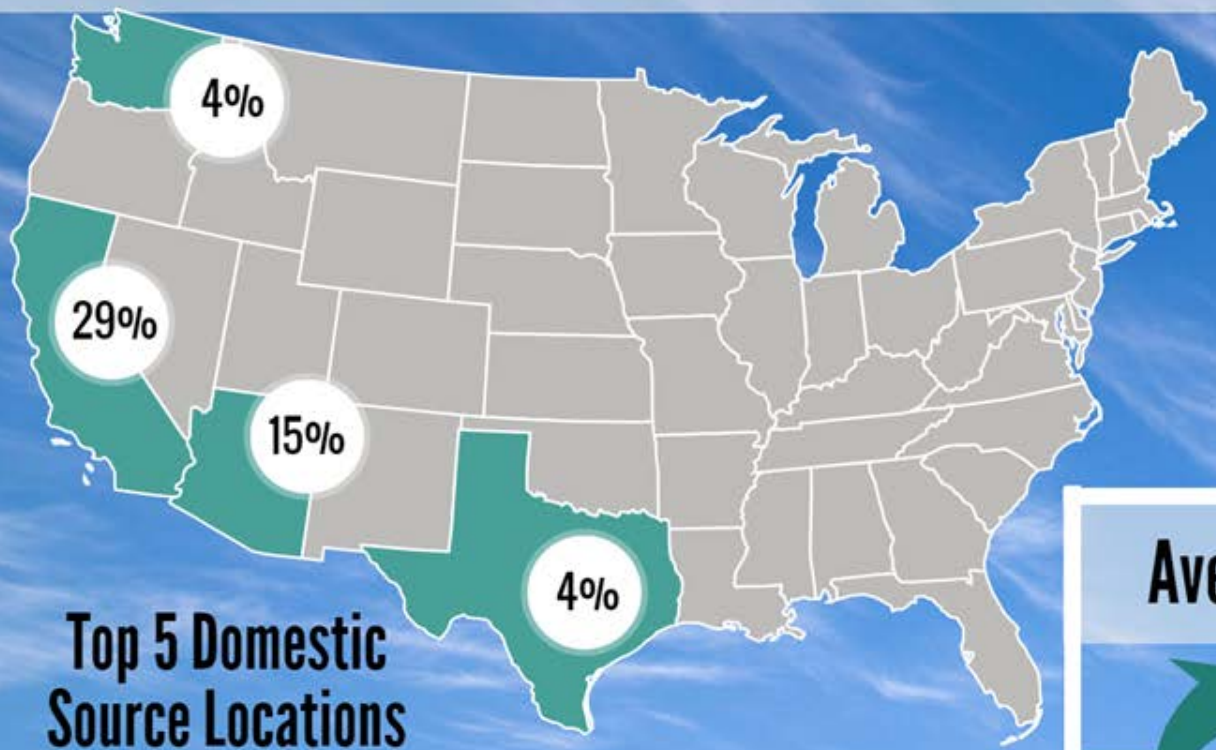
## Airports

**392,010**
Passengers

Up 3.2% YOY

Source: NAU

# West Coast Region
# May 2015 OTA Search & Book Trends

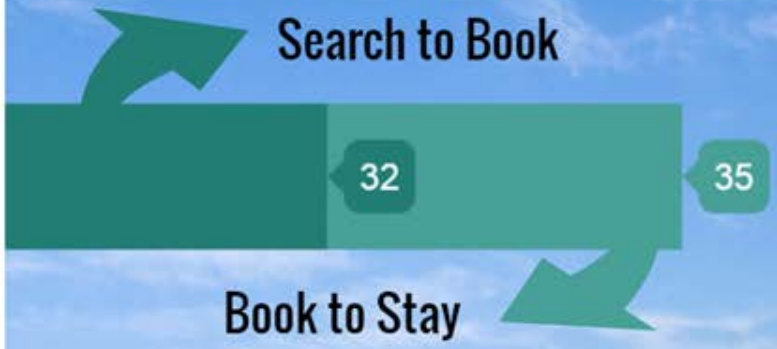



**4.1%**
Of all searches for Arizona

## Top 5 Domestic Source Locations

1. California
2. Arizona
3. Texas
4. Washington

## Average Lead Time (Days)




*For domestic travel to the West Coast Region in May 2015

Source: nSight

# North Central Region

(Gila and Yavapai Counties)

**5.0 million**

Domestic Overnight Visitors

**$1.0 billion**

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014

# $1.0 billion of direct spending generated...

## $249 million

employment earnings

Up 3.2% YOY

## 10,750

industry jobs

Up 1.9% YOY

## $75 million

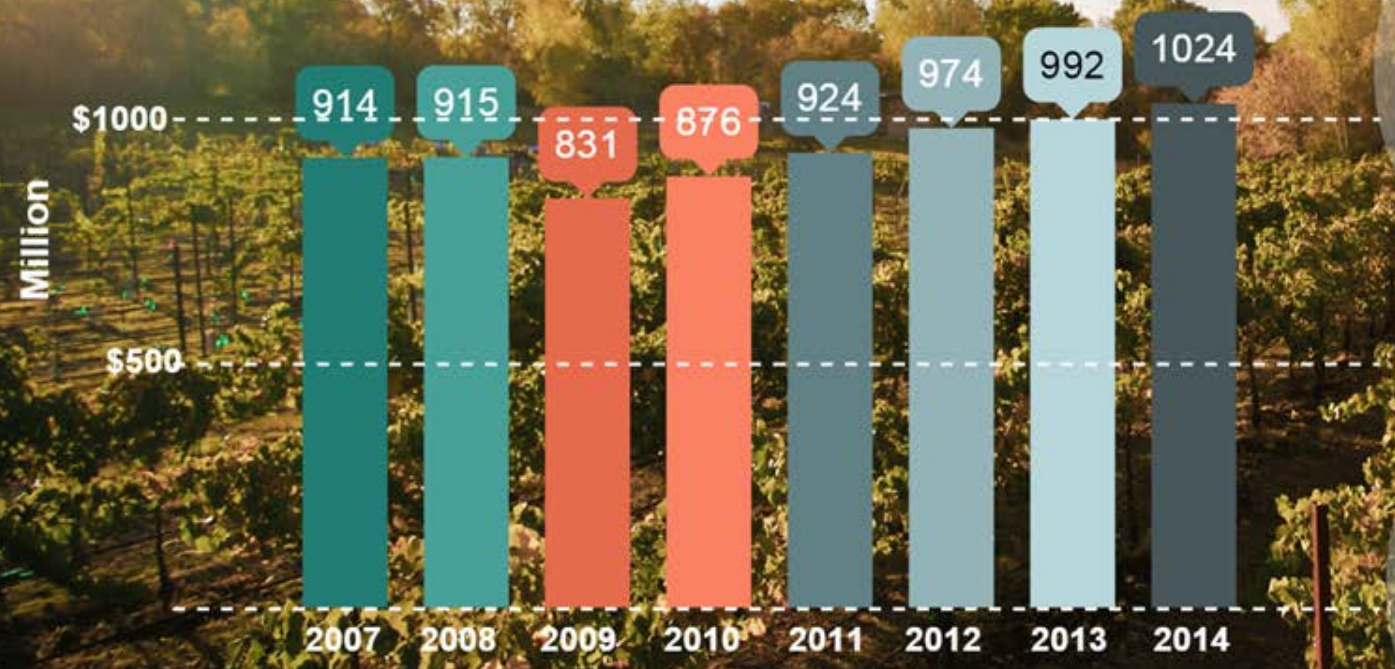
state and local tax revenues

Down* -1.3% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

# Direct Travel Spending in North Central Region



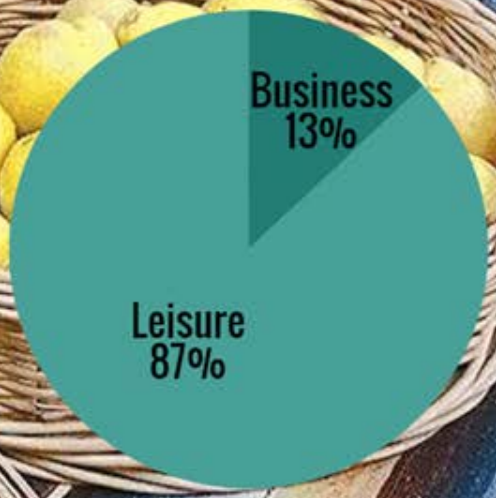

3.2%
YOY

11.6%
Compared to 2007

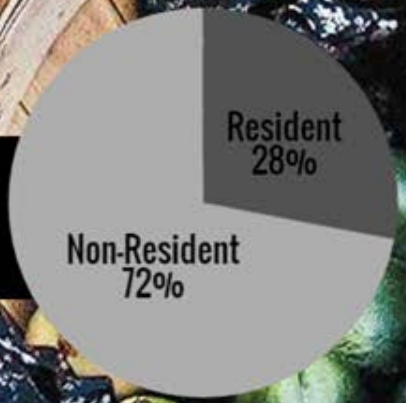
Source: Dean Runyan Associates, 2014

# Domestic Overnight Visitation to North Central Region

## North Central Region




## Arizona



Source: Longwoods International, 2014

# North Central Region Domestic Overnight Visitor Portrait

| | |
|---|---|
| 4.0 | nights |
| 3.0 | persons per party |
| $678 | trip expenditures* |
| 72% | paid accommodations |
| $71,690 | average household income |
| 45.3 | average age |

## Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Hiking/Backpacking

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# North Central Region
# 2014 Indicator Performance

## Lodging

**56.1%**
Occupancy
Up 1.9% YOY

**$103.02**
ADR
Up 3.4% YOY

**$58.95**
RevPAR
Up 5.9% YOY

Source: STR

# North Central Region
# 2014 Indicator Performance

## State Parks

**393,586**
Total Visitors

Up 10.4% YOY

## National Parks

**572,635**
Recreational Visits

Up 11.3% YOY

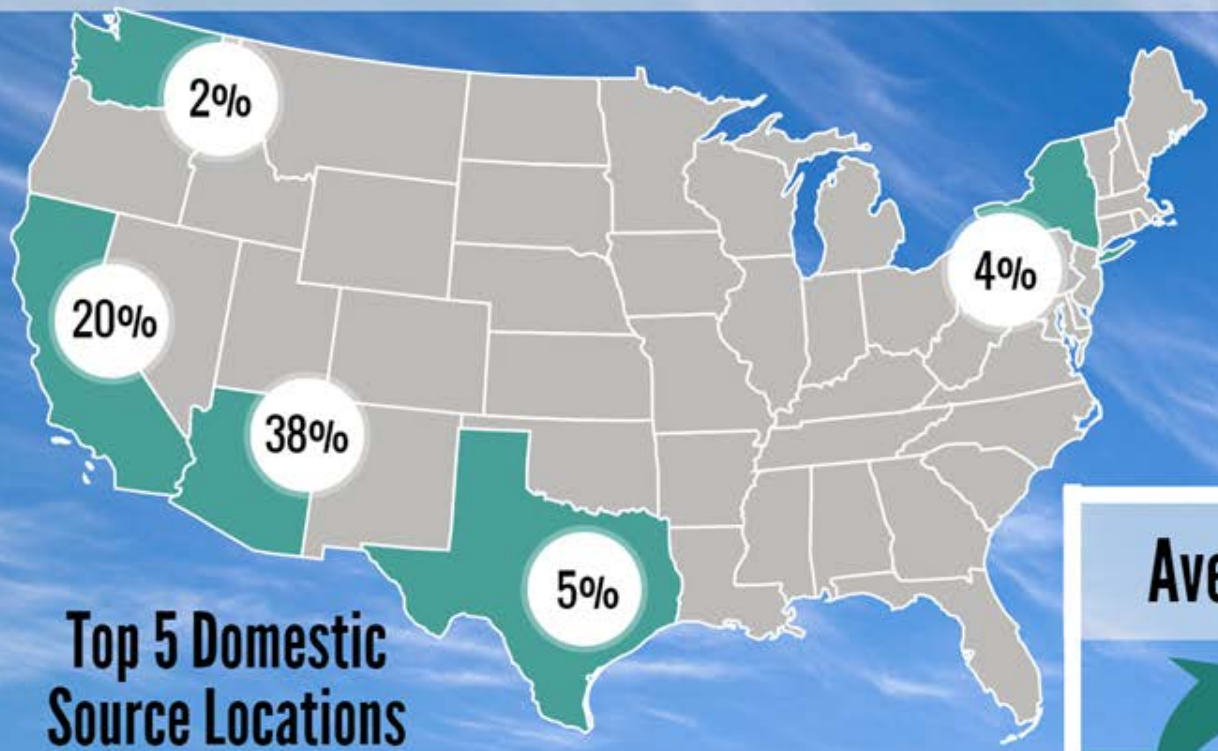
## Airports

**7,786**
Passengers

Down 26.2% YOY

Source: NAU

# North Central Region
# May 2015 OTA Search & Book Trends



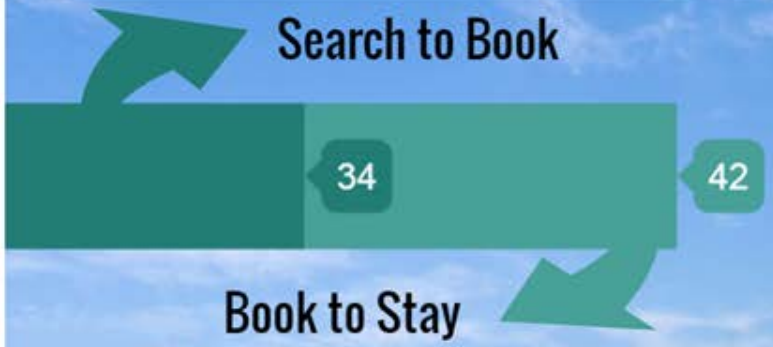

**12%**
Of all searches for Arizona

## Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Washington

Source: nSight

## Average Lead Time (Days)




*For domestic travel to the North Central Region in May 2015

# Tucson & Southern Region

(Cochise, Graham, Greenlee, Pima and Santa Cruz Counties)

**6.0 million**

Domestic Overnight Visitors

**$3.6 billion**

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014

# $3.6 billion of direct spending generated...

## $785 million
employment earnings

Up 7.6% YOY

## 30,690
industry jobs

Up 4.0% YOY

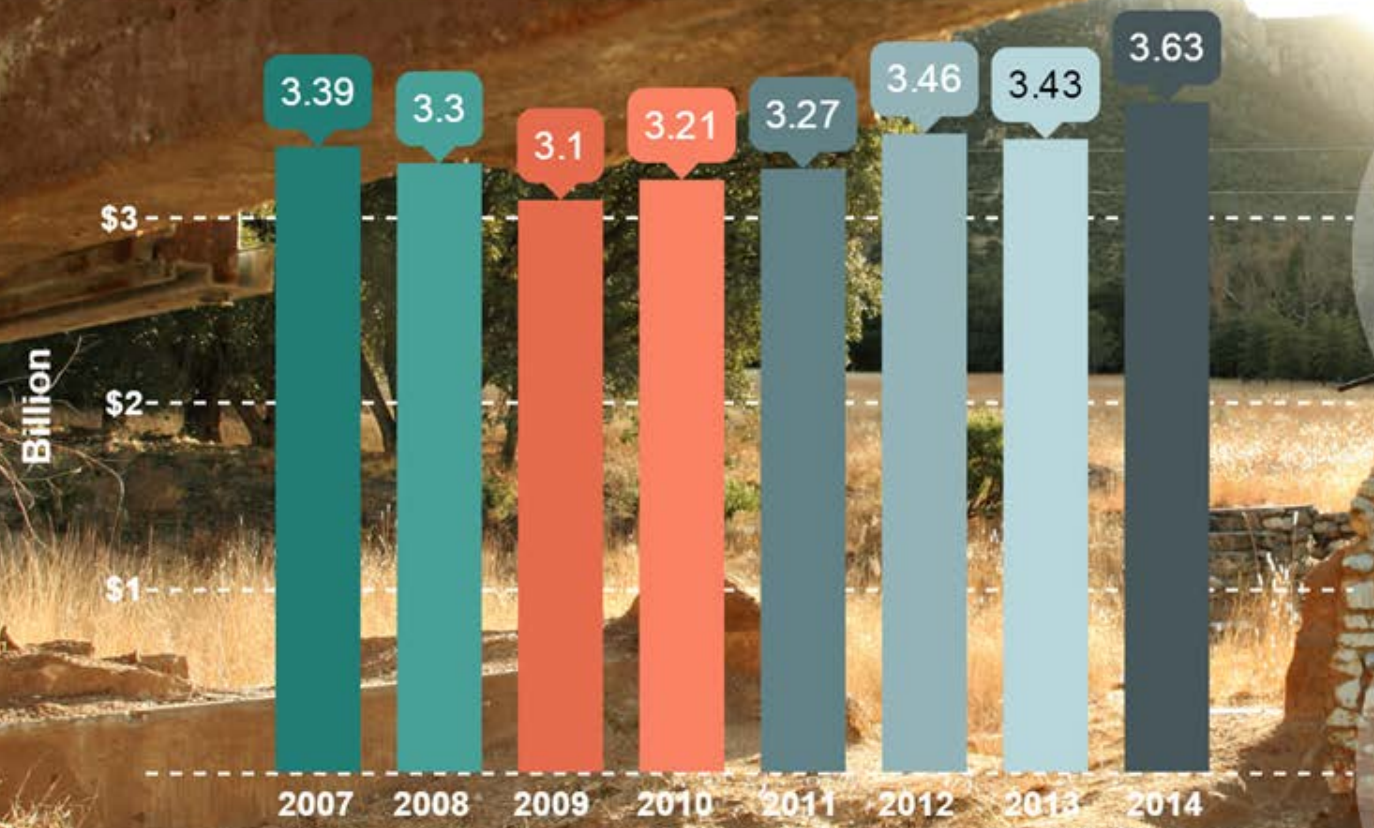
## $245 million
state and local tax revenues

Down* -9.3% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

# Direct Travel Spending in Tucson & Southern Region



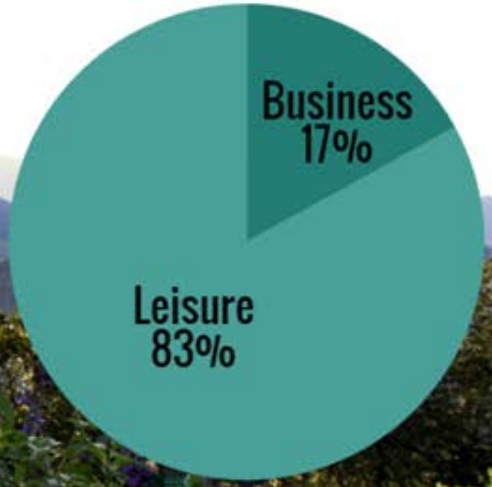

6.0%
YOY

7.1%
compared to 2007

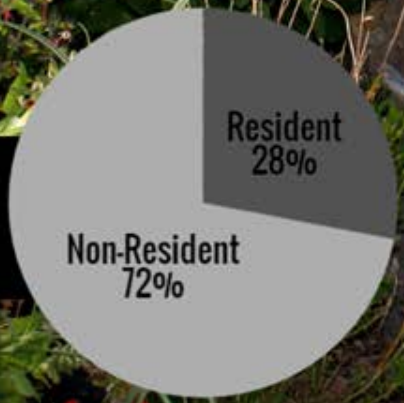
Source: Dean Runyan Associates, 2014

# Domestic Overnight Visitation to Tucson & Southern Region

## Tucson & Southern Region




## Arizona



Source: Longwoods International, 2014

# Tucson & Southern Region Domestic Overnight Visitor Portrait

| | |
|---|---|
| 4.4 | nights |
| 2.6 | persons per party |
| $730 | trip expenditures* |
| 60% | paid accommodations |
| $67,060 | average household income |
| 47.1 | average age |

## Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Swimming

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Tucson & Southern Region 2014 Indicator Performance

## Lodging

**52.8%**
Occupancy
Up 2.7% YOY

**$79.19**
ADR
Up 3.4% YOY

**$42.28**
RevPAR
Up 5.9% YOY

Source: STR

# Tucson & Southern Region 2014 Indicator Performance

## State Parks

**628,795**
Total Visitors

Up 6.8% YOY

## National Parks

**1.09 million**
Recreational Visits

Up 3.0% YOY

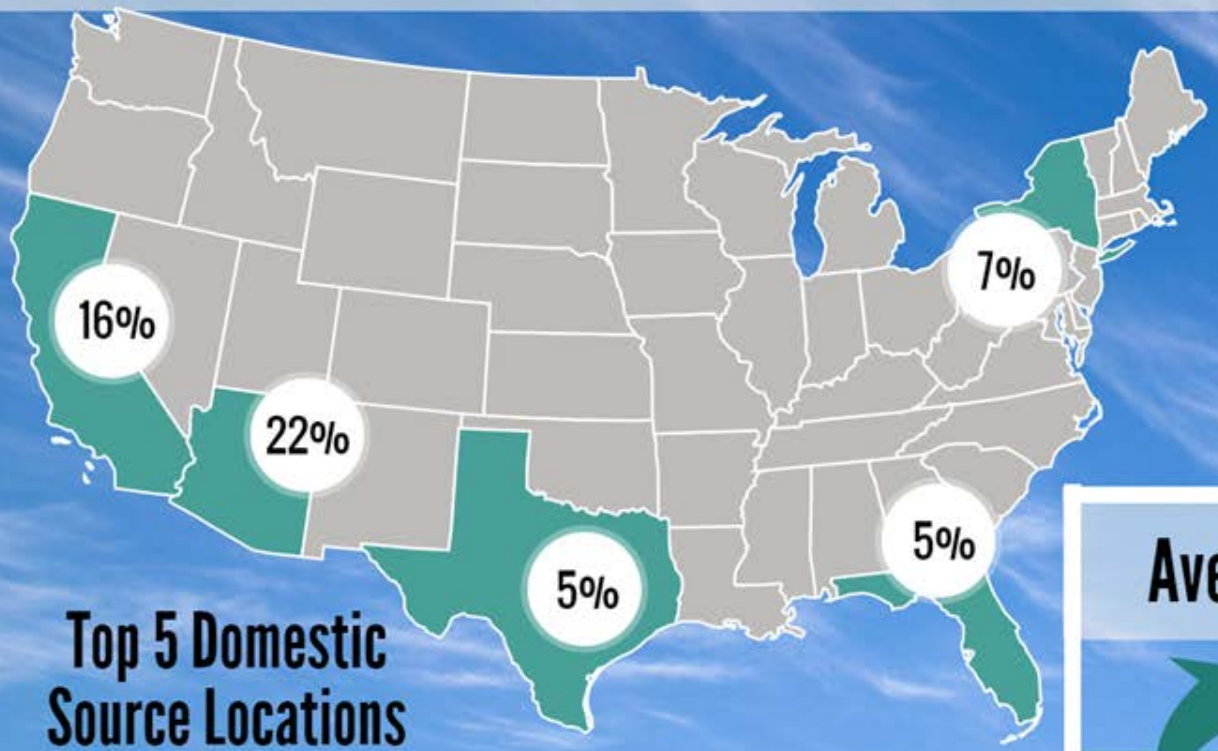
## Airports

**3.25 million**
Passengers

Up 0.3% YOY

Source: NAU

# Tucson & Southern Region May 2015 OTA Search & Book Trends



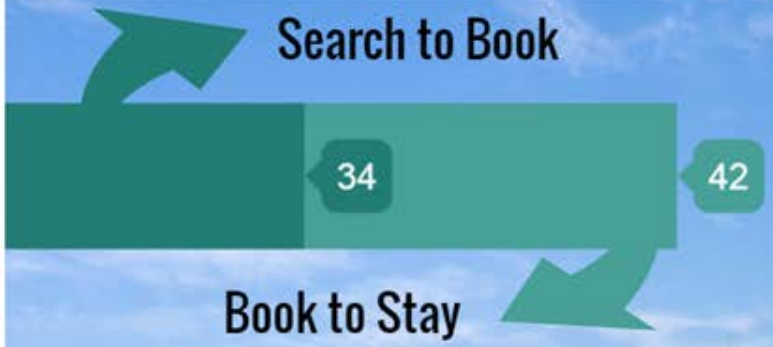

**9.4%**
Of all searches for Arizona

## Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Florida

Source: nSight

## Average Lead Time (Days)




*For domestictravel to Tucson & Southern Region in May 2015

# Phoenix & Central Region

(Maricopa and Pinal Counties)

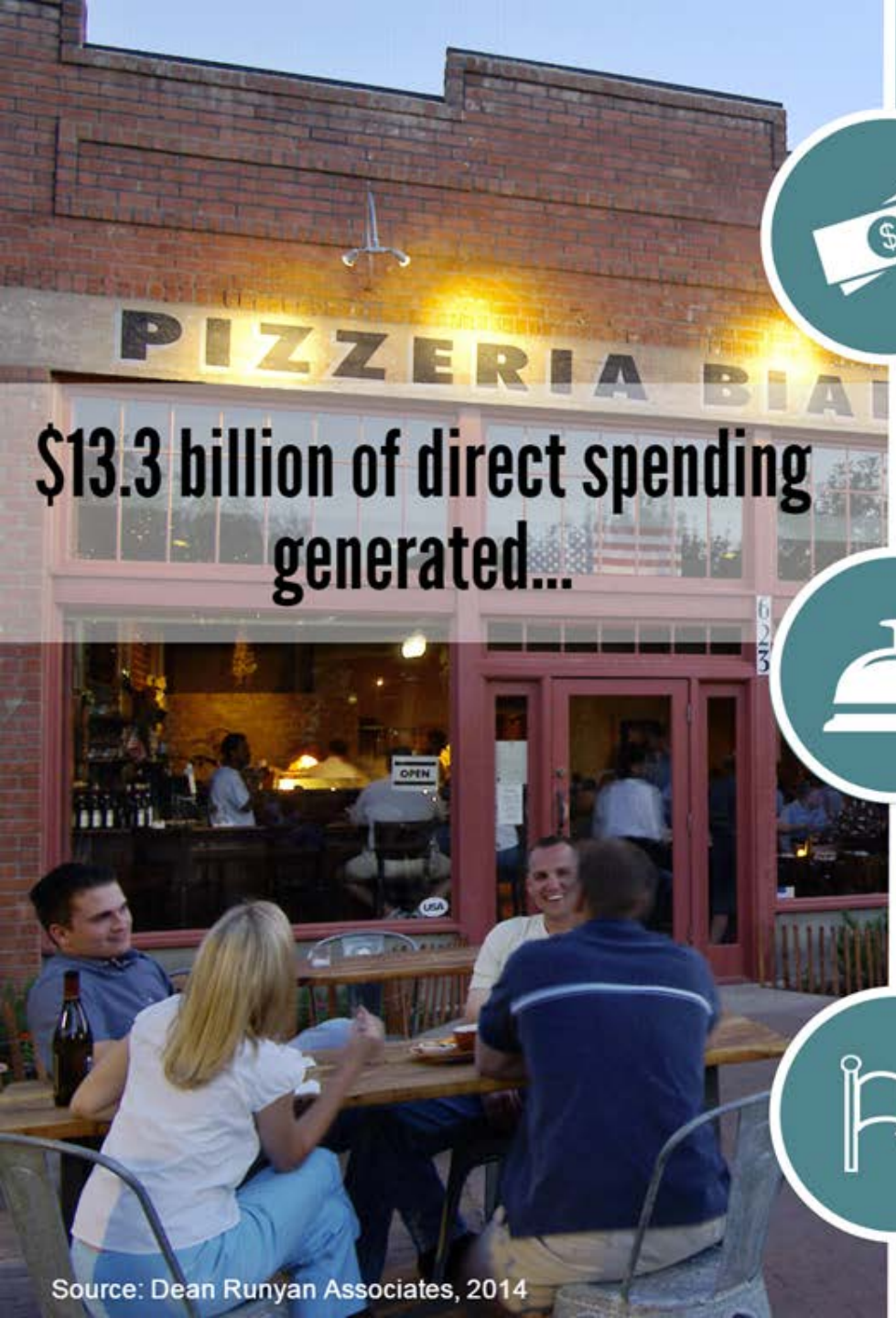
**19.0 million**

Domestic Overnight Visitors

**$13.3 billion**

Total Direct Spending

Source: Dean Runyan Associates, Tourism Economics, 2014




# $13.3 billion of direct spending generated...

## $4.1 billion
employment earnings

Up 6.9% YOY

## 100,150
industry jobs

Up 5.0% YOY

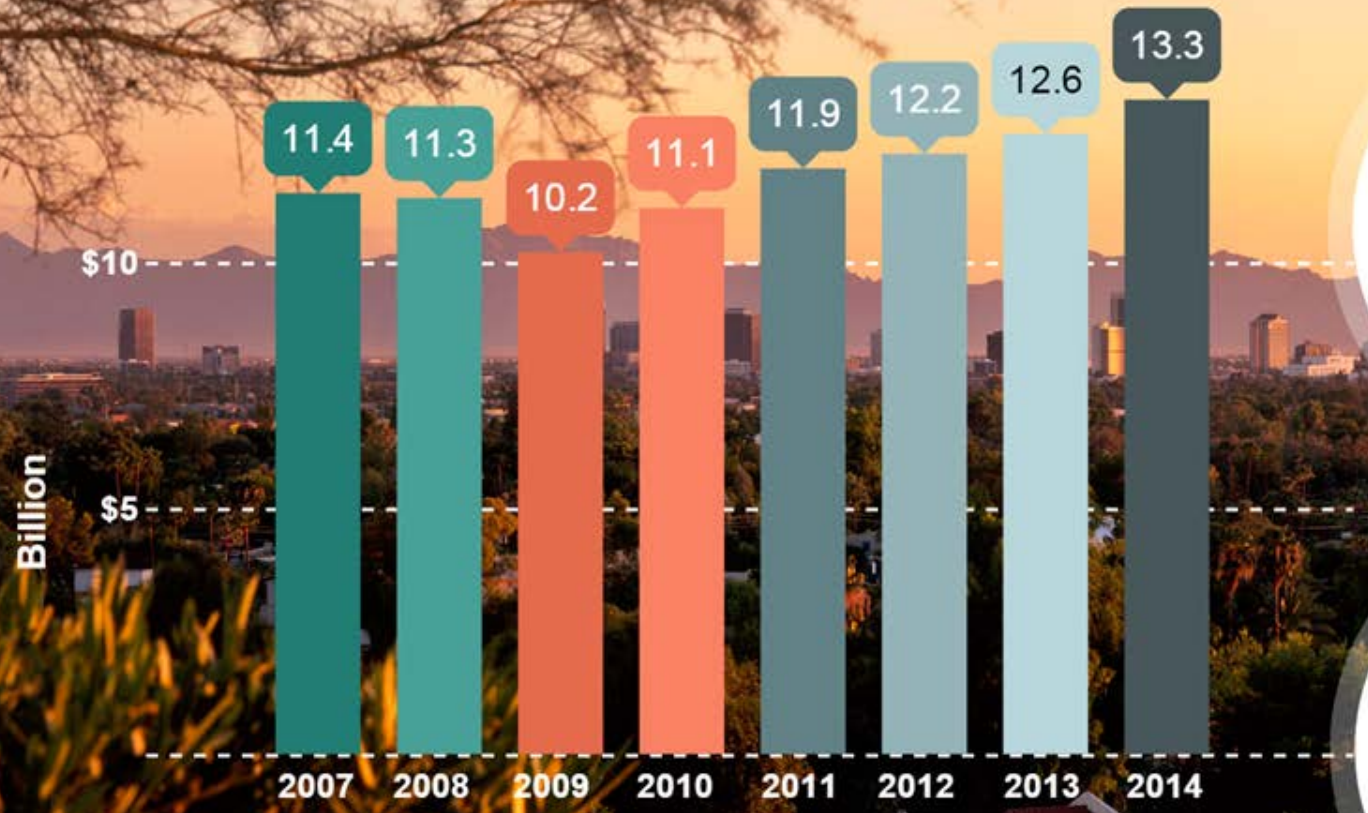
## $991 million
state and local tax revenues

Down* -0.5% YOY

*Decline due to expiration of temporary 1% sales tax in May 2013

Source: Dean Runyan Associates, 2014

# Direct Travel Spending in Phoenix & Central Region



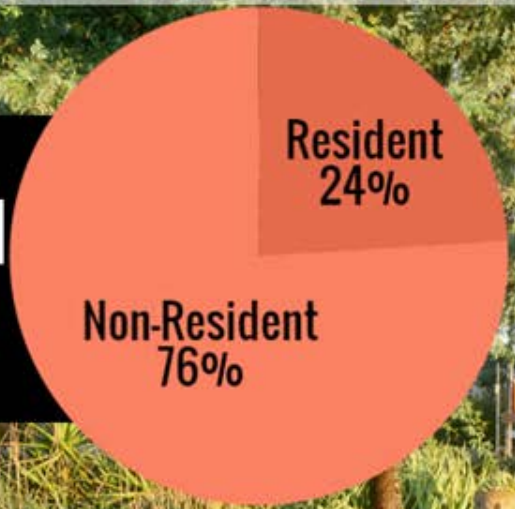

↑ 6.1% YOY

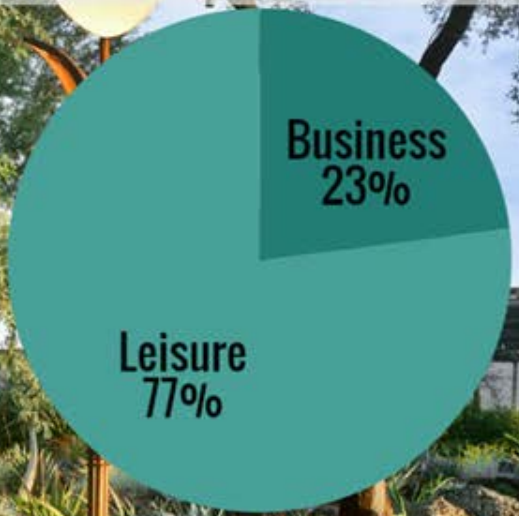
↑ 16.7% compared to 2007

Source: Dean Runyan Associates, 2014

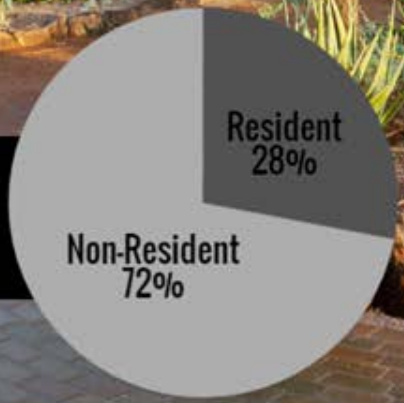
# Domestic Overnight Visitation to Phoenix & Central Region

## Phoenix & Central Region




## Arizona



Source: Longwoods International, 2014

# Phoenix & Central Region Domestic Overnight Visitor Portrait

| | |
|---|---|
| 4.4 | nights |
| 2.6 | persons per party |
| $812 | trip expenditures* |
| 62% | paid accommodations |
| $72,540 | average household income |
| 46.2 | average age |

## Top 5 Activities

- Shopping
- Fine Dining
- National/State Park
- Landmark/Historic Site
- Swimming

Source: Longwoods International, 2014

*Does not include transportation to and from destination

# Phoenix & Central Region 2014 Indicator Performance

## Lodging

**58.8%**
Occupancy
Up 3.3% YOY

**$97.16**
ADR
Up 4.5% YOY

**$57.93**
RevPAR
Up 8.4% YOY

Source: STR

State Park Background photo

# Phoenix & Central Region 2014 Indicator Performance

## State Parks

**282,700**

Total Visitors

Up 3.9% YOY

## National Parks

**63,698**

Recreational Visits

Down 2.2% YOY

## Airports

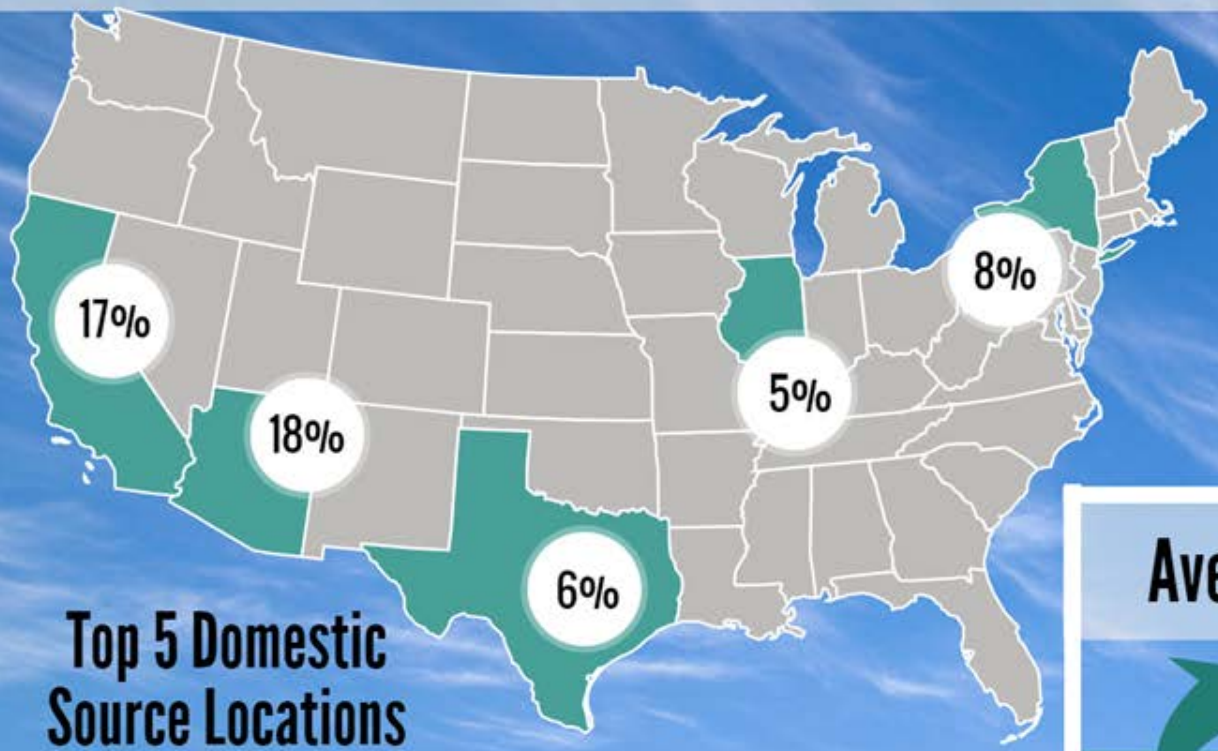
**43.4 million**

Passengers

Up 4.0% YOY

Source: NAU

# Phoenix & Central Region May 2015 OTA Search & Book Trends



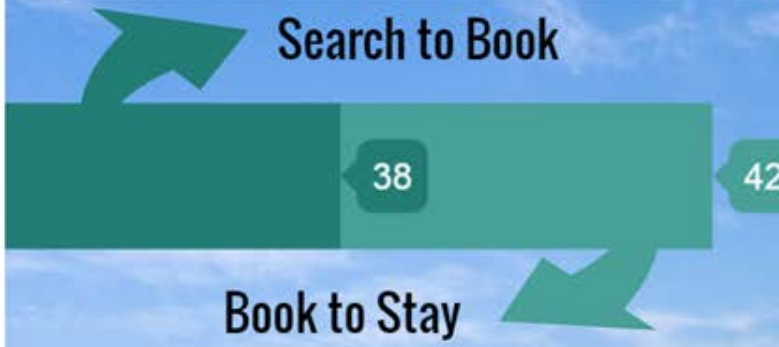

**53%**
Of all searches for Arizona

## Top 5 Domestic Source Locations

1. Arizona
2. California
3. New York
4. Texas
5. Illinois

Source: nSight

## Average Lead Time (Days)




*For domestic travel to the Phoenix & Central Region in May 2015

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

## Methodology

**OBJECTIVE**

Capture Visa card spending activity throughout Maricopa County and at major events/venues related to Super Bowl XLIX.

**TIME PERIOD**

Saturday, January 24, 2015 through Wednesday, February 3, 2015.

**COMPARISON**

Year-over-year comparison (Saturday, January 25, 2014 through Wednesday, February 4, 2014).

Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## ADVANTAGES

Based on actual domestic visitor Visa spending in Maricopa County

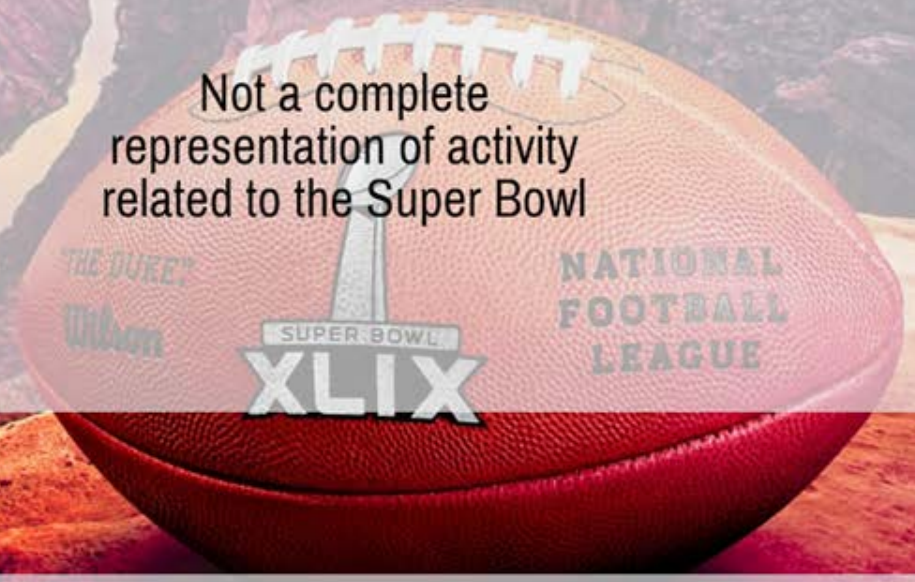
Can evaluate spend activity by geographic segment

Details available by Merchant Category Spending

## LIMITATIONS

Cannot be used as Economic Impact

Not a complete representation of activity related to the Super Bowl




Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## Overall - Maricopa County*

**$59 million**

lift in Visa Card Spending

**7.8%** ↑

in Year-over-year (YOY) Visa Card Spending

* Reflects all Visa Card Spending, including Maricopa County residents.

Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## Overall - Maricopa County (Out-of-area Origin)

**$24 million**

lift in Visitor Visa Card Spending

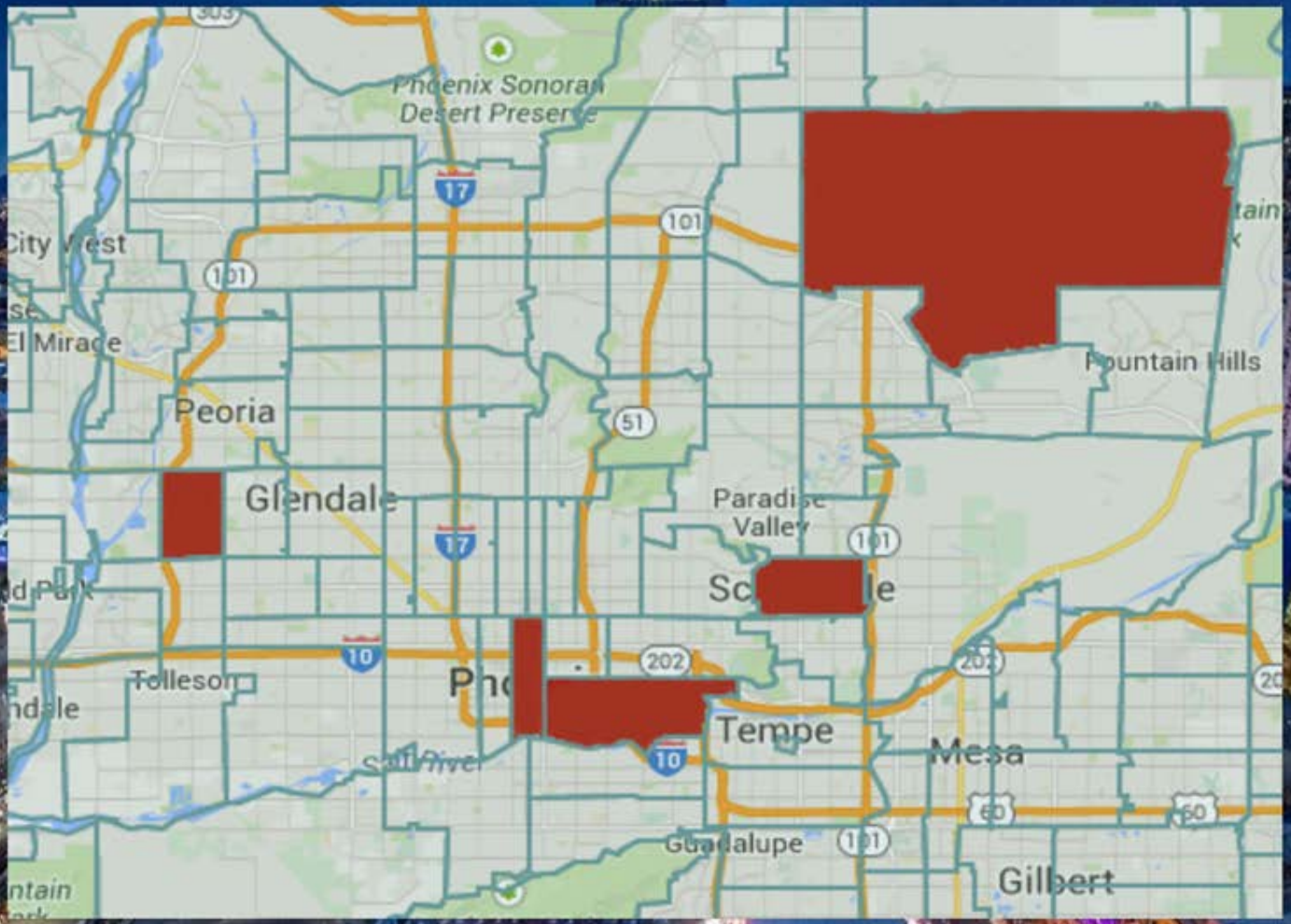
**18.2% ↑**

in Year-over-year (YOY) Visitor Visa Card Spending

* Reflects out-of-area origin only. Maricopa County data was removed.

Source: AOT Research/VisaVUE

# Map of Geographic Segments Represented




Source: Google Maps

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## Geographic Segments

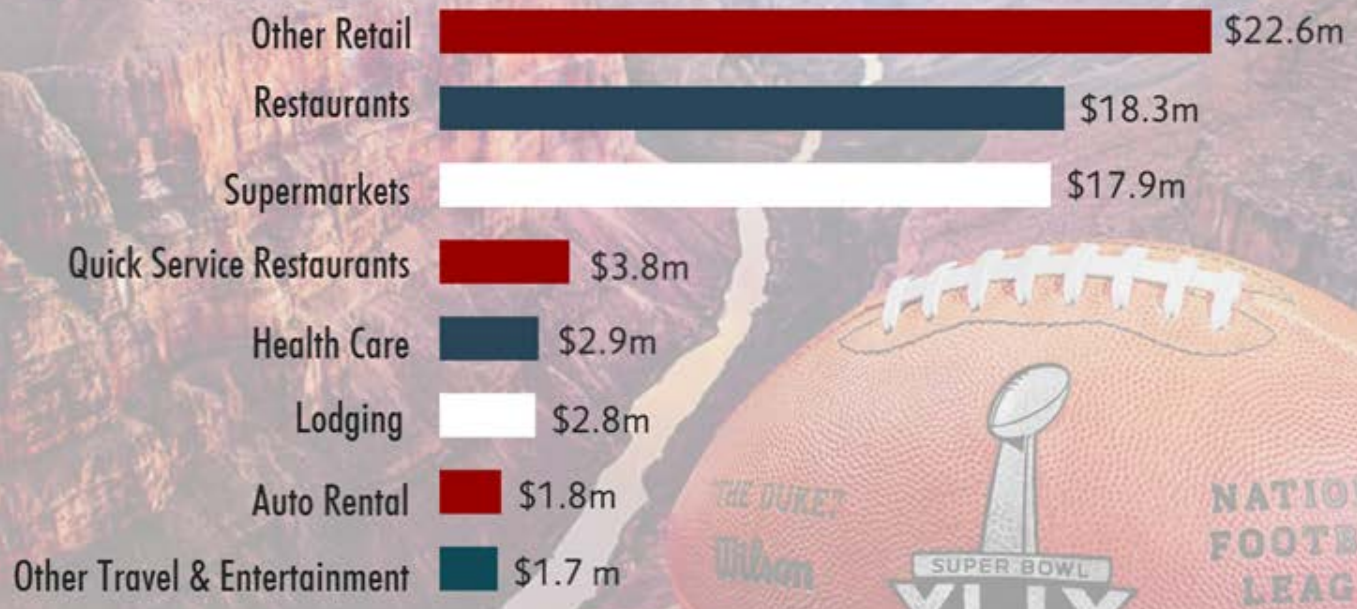
| | Out-of-Area | | Total (with Phoenix) | |
|---|---|---|---|---|
| Visitor Visa Card Spending (Jan 24 - Feb 3, 2015) | Spending YOY Growth | Spending Difference (lift) | Spending YOY Growth | Spending Difference (lift) |
| Glendale | 143.4% | $1.6 million | 59.3% | $3.2 million |
| Phoenix Downtown | 168.0% | $4.4 million | 88.4% | $8.0 million |
| Scottsdale Downtown | 45.0% | $3.1 million | 19.8% | $5.0 million |
| Phoenix Open-Scottsdale | 23.8% | $800,000 | 12.6% | $1.2 million |
| Phoenix Sky Harbor | 22.9% | $450,000 | 15.1% | $5.8 million |

Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## Top Merchant Categories Spending Lift



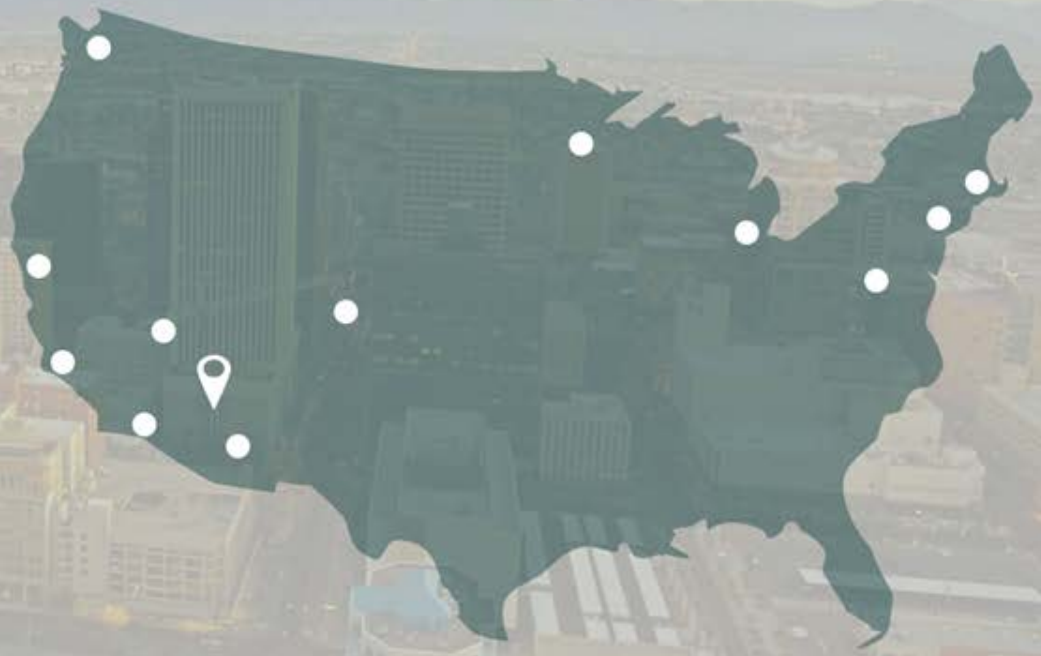

Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## Metropolitan Statistical Areas (MSAs) Spending Lift

#1 Los Angeles, CA: $9.2 million
#2 Seattle, WA: $8.1 million
#3 Chicago, IL: $7.2 million
#4 New York City, NY: $6.1 million
#5 Denver, CO: $5.0 million
#6 Tucson, AZ: $4.9 million
#7 Minneapolis, MN: $4.5 million
#8 San Francisco, CA $4.2 million
#9 Washington, DC: $3.9 million
#10 Las Vegas, NV: $3.3 million
#11 San Diego, CA: $3.0 million
#12 Boston, MA: $2.9 million



Source: AOT Research/VisaVUE

# Arizona Super Bowl Visitor VisaVUE Spending Trends

Saturday, January 24, 2015 through Wednesday, February 3, 2015

## Metropolitan Statistical Areas (MSAs) Spending

### YOY GROWTH

| | |
|---|---|
| #1 Seattle | 137.6% |
| #2 Boston | 70.9% |
| #3 NYC | 54.6% |

Source: AOT Research/VisaVUE

# Competitive Analysis of AOT's Budget

1. Tourism industry is essential to economic development
2. Arizona's tourism market competiveness over time
3. Benchmarking AOT's budget against other destinations
4. Recommending the optimal competitive budget for AOT
5. Potential benefits; scenario economic impact analysis

# Competitor Tourism Budgets

Source: U.S. Travel Association - Survey of U.S. State Tourism Office Budgets (2013-2014)

ARIZONA
OFFICE OF TOURISM

# Thank You!

## AOT Research Team:

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tourism.az.gov