



Arizona Tourism Strategic Recovery Plan

July 2020

ARIZONA
OFFICE OF TOURISM



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Arizona Statewide Tourism Recovery Plan

None of us could have imagined at the start of 2020 — as we were coming off another record-breaking year in Arizona for overnight visitation, visitor spending and tourism taxes collected — that soon we would be fighting for the survival of the tourism industry and the people and communities it supports.

The COVID crisis has hit the state extremely hard and the Arizona Office of Tourism's commitment to supporting our industry remains strong and focused. This statewide Arizona Tourism Strategic Recovery Plan is the next step in that ongoing commitment. Although many factors are out of our control and much uncertainty remains, you can be sure that we are all traveling this road together.

We have spoken to hundreds of people across our industry during these past few months. I cannot thank everyone enough for sharing your challenges, successes and priorities with us. Those candid conversations have enabled us to build your voices into this plan.

This is a statewide Arizona tourism recovery plan, created by AOT, but submitted on behalf of the entire tourism industry. We're proud to share it with you and, more importantly, look forward to working together using the areas of focus and steps in the plan to bring strong recovery to our communities, state and industry.

Debbie Johnson
Director, Arizona Office of Tourism



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You can find the complete plan
at tourism.az.gov



AOT Mission

To stabilize and strengthen local economies, protect natural and cultural resources, provide a meaningful visitor experience and enhance the quality of life for Arizona residents through tourism promotion.



Executive Summary

In response to the COVID-19 pandemic, the Arizona Office of Tourism (AOT) has developed a Tourism Strategic Recovery Plan to accelerate the recovery of travel and tourism throughout the state over the next 12-18 months. While AOT acknowledges the many challenges that lie ahead, far too much is at stake to stand idle and wait for an unknown future. Instead, AOT has made the stabilization and recovery of Arizona’s tourism economy its top priority.

The plan includes:

- **Methodology for Recovery Plan creation**
- **Vision statement for recovery**
- **Descriptions of three likely pandemic/recession recovery scenarios**
 - V (Rapid)
 - U (Steady and Incremental)
 - L (Long Haul)
- **Decision criteria which serve as the basis for choosing certain actions to achieve recovery**
- **Recovery elements:**
 - Key priorities highlighting the most important things to accomplish
 - Strategic areas of focus within each key priority
 - Actions to take to accelerate the recovery
- **Windsocks (measures) that will provide information whether to stay the course, or pivot to a different recovery strategy**

Central to the Recovery Plan are the key priorities and strategic areas of focus. These identify the most important things to accomplish in terms of stabilization and recovery, and the areas to focus on to successfully address each priority.

The three key priorities and strategic areas of focus are:

- 1. Accelerate leisure travel activity statewide**
 - Food & Beverage
 - Outdoor Recreation
 - Accommodations
 - Luxury Experiences
- 2. Stabilize visitor volume in urban centers**
 - Resorts / Hotels
 - Attractions
 - Sports
 - Meetings, Conventions, and Business Travel
- 3. Reinvigorate and strengthen tourism in rural and Tribal areas**
 - Traveler education with emphasis on stewardship principles
 - Balancing business and resident readiness
 - Outdoor Recreation
 - Partnerships with Tribal Communities

Recovery Planning Methodology

In May of 2020, a Recovery Planning Team convened by AOT met for four three-to-four-hour work sessions to explore and articulate the path forward for Arizona’s tourism and travel recovery. The contents of this document are rooted in the idea that identifying key priorities and actions to achieve those priorities will accelerate Arizona’s recovery.

The Planning Team that developed the Tourism Strategic Recovery Plan included AOT staff. Over the course of these meetings, the Planning Team reviewed and discussed the following, which are also included in this report:

- The Insight Report (see the appendix for an executive summary)
- A unified statement on what the Arizona Recovery might look like (page 10)
- Decision criteria by which strategic actions would be evaluated (page 13)
- Likely macro recovery scenarios, and which one AOT would lead with (page 12)
- Key priorities, strategic areas of focus, and action items (page 15)

Additionally, sub-groups of the Planning Team met in June to further explore:

- Action item prioritization
- Windsock designations

How to Use this Plan

This plan contemplates a 12-18 month time frame and begins with a vision of what the Arizona recovery will look like. While this plan was coordinated with the Arizona Office of Tourism, this plan is for the recovery of the tourism industry in Arizona. The work described here will be done in partnership with tourism stakeholders. The work to be done assumes a steady and incremental recovery, and is centered around three key priorities, which highlight the most important things to accomplish in this time frame. Each of these priorities is supported by strategic areas of focus, and actions to undertake within each of those areas of focus. There are 41 actions identified overall. It is likely AOT will work on several actions at a time, directed by cross-functional teams focused on recovery, AOT’s role, and the appropriate sequencing of actions.

In order to execute this plan, AOT will create internal tactical teams focused on stabilization and recovery. Regular communications will take place to ensure tourism stakeholders are kept apprised of the ongoing work, successes, and recovery trends.

This plan is not meant to be an inflexible to-do list. In fact, flexibility and nimbleness will be paramount to success during the recovery period. This plan should be considered a solid path to follow for the next 12-18 months to set Arizona up for greater—and faster—recovery success. Periodic checks of trends in public health, state/national economy, and travel sentiment will provide information affirming that this plan remains the right path forward, or that it is time to pivot to a new plan that recognizes a different economic reality, for example, a more rapid recovery or a longer-haul recovery.



The Arizona Recovery

Early in the process, Coraggio asked the Planning Team to share their thoughts on what recovery would look like in 12-18 months. The purpose of this exercise was to have a shared vision of the future and what AOT was seeking to manifest during these unprecedented times. By having a shared vision and future goal, Arizona will be better positioned to achieve success, as all actions will be in service of making both a reality. The recovery vision the Planning Team developed follows.

The Arizona Recovery: Leading the way for a new future

While AOT acknowledges the many challenges that lie ahead, far too much is at stake to stand idle and wait for an unknown future the COVID-19 pandemic might deliver. Instead, AOT has made the stabilization and recovery of Arizona's tourism economy its top priority. We accept the responsibility of leading the way for our industry and are unified in our commitment to restoring Arizona as one of the country's most traveled destinations.

Ideally, our Tourism Strategic Recovery Plan would result in a fast return to a pre-COVID-19 normal. However, the challenges we face are anything but ideal and the notion of back-to-normal as a measure of success is unrealistic.

Just like the rest of the nation, Arizona's recovery will take time and will require a very different way of thinking and executing. Normal is up to us to define and it's up to us to create the path forward to get us there. Our many stakeholders across our state need our leadership, our focus, and our steady hand now more than ever. Together we will lead our industry to the other side of the pandemic, and, because of our efforts, Arizona will be recognized as a national model for recovery.

So, what does recovery look like to us over the next 12-18 months? How will we know our collective actions have set the stage for creating an **even better normal** than we knew before COVID-19?

It will not be just one thing. Our vision will be a combination of carefully conceived actions coming together to tell a story of recovery—one that will give evidence of a stable foundation for a new future.

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| <div>1</div> Communities throughout the state have the resources they need to safely welcome visitors and protect community health. | <div>6</div> Innovative strategic partnerships have been formed, resulting in new opportunities to accelerate desired visitation statewide. |
| <div>2</div> All tourism facets (food, beverage, outdoor recreation, attractions, accommodations) are either experiencing or showing signs of positive growth that started back in 2014/2015. | <div>7</div> The role of tourism as a driver of a healthy Arizona economy is embraced by the vast majority of Arizona residents. |
| <div>3</div> Meetings and convention activity have increased with a steady trend line of opportunity for in-state gatherings. | <div>8</div> All gains in tourism activity have been driven by sound destination stewardship principles. |
| <div>4</div> Going into 2021/2022, AOT has a steady and consistent funding level to allow it to market for tourism recovery. | <div>9</div> AOT has developed enhanced capabilities to quickly and effectively adapt to change. |
| <div>5</div> Stakeholder engagement has substantially increased statewide, evidenced by enhanced communication and coordination. | <div>10</div> Arizona is emerging as a national leader in tourism recovery. |



Macro-Economic Dynamics

Many trusted sources, including Forbes¹ and Harvard Business Review², have published articles on what could happen in a macro-economic sense as the world moves forward from the onset of the pandemic. These articles discuss travel restrictions, social distancing policies, and their economic impact. This economic impact has included the declaration of a recession, rising unemployment, and reduced consumer spending.

Past recession recoveries have followed three common shapes – V (Rapid), U (Steady and Incremental) and L (Long Haul). The Planning Team crafted descriptions of these three scenarios to reflect the Arizona context, and highlighted a few preliminary descriptors of what this could look like.

- **V (Rapid):** Fast, dramatic dip in economy followed by narrow trough and quick, steady recovery over a period of six months. A fall 2020 resurgence of the virus could create a double-V economic response. Vaccine secured by early 2021 and public administration starting. Reopening of the economy delivers minimal or manageable impact to infection rate. Pre-COVID economic activity returning to 75% of what we were doing in the leisure market within 12 months, by spring 2021. In Arizona, this may look like:
 - Airlines are adding capacity this fall and reinstating schedules to traditional destinations, and increasing rate of bookings
 - International flights resume
 - Select destinations see marked visitation increases, likely from out-of-state travelers
- **U (Steady and Incremental):** Fast, dramatic dip in economy followed by an extended trough period and a gradual upswing. Social distancing remains in place through the fall of 2020. Slow but steady return to a viable operating environment in US/global markets. Vaccine secured by spring of 2021. Steady economic improvement reaching pre-COVID levels in 12-18 months, by fall of 2021. In Arizona, this may look like:
 - A prolonged visitation to outdoor recreation assets, with a need to focus on destination stewardship
 - The return of regional domestic and North American international travel
 - Travel, meetings, and conventions returning by spring 2021
- **L (Long Haul):** Fast, dramatic dip in US/global economy followed by very long period of minimal incremental improvement, likely triggered by multiple outbreaks in AZ and feeder markets or no vaccine over a long period of time. This is a worst-case scenario with a return to pre-COVID economic activity taking a few years. In Arizona, this may look like:
 - Promoting the rural parts of the state as a destination on par with how destinations like Montana are typically promoted
 - No international travel in the foreseeable future
 - More intentional partnerships with state and federal agencies on maintaining public lands
 - Travel, meetings, and conventions do not return to pre-COVID levels for multiple years

The Planning Team deliberated on which recovery scenario felt most probable, given current data trends. While there is certainly a component of “reading tea leaves” to making a choice, the Planning Team determined it would develop a Tourism Strategic Recovery Plan assuming a “U” Steady and Incremental recovery was ahead for the next 12-18 months. Factors that went into this determination included: the likely timing and availability of a vaccine; the political drive to ensure the economy does not grind to a halt; and the human desire to travel even if it is limited to in-state travel.

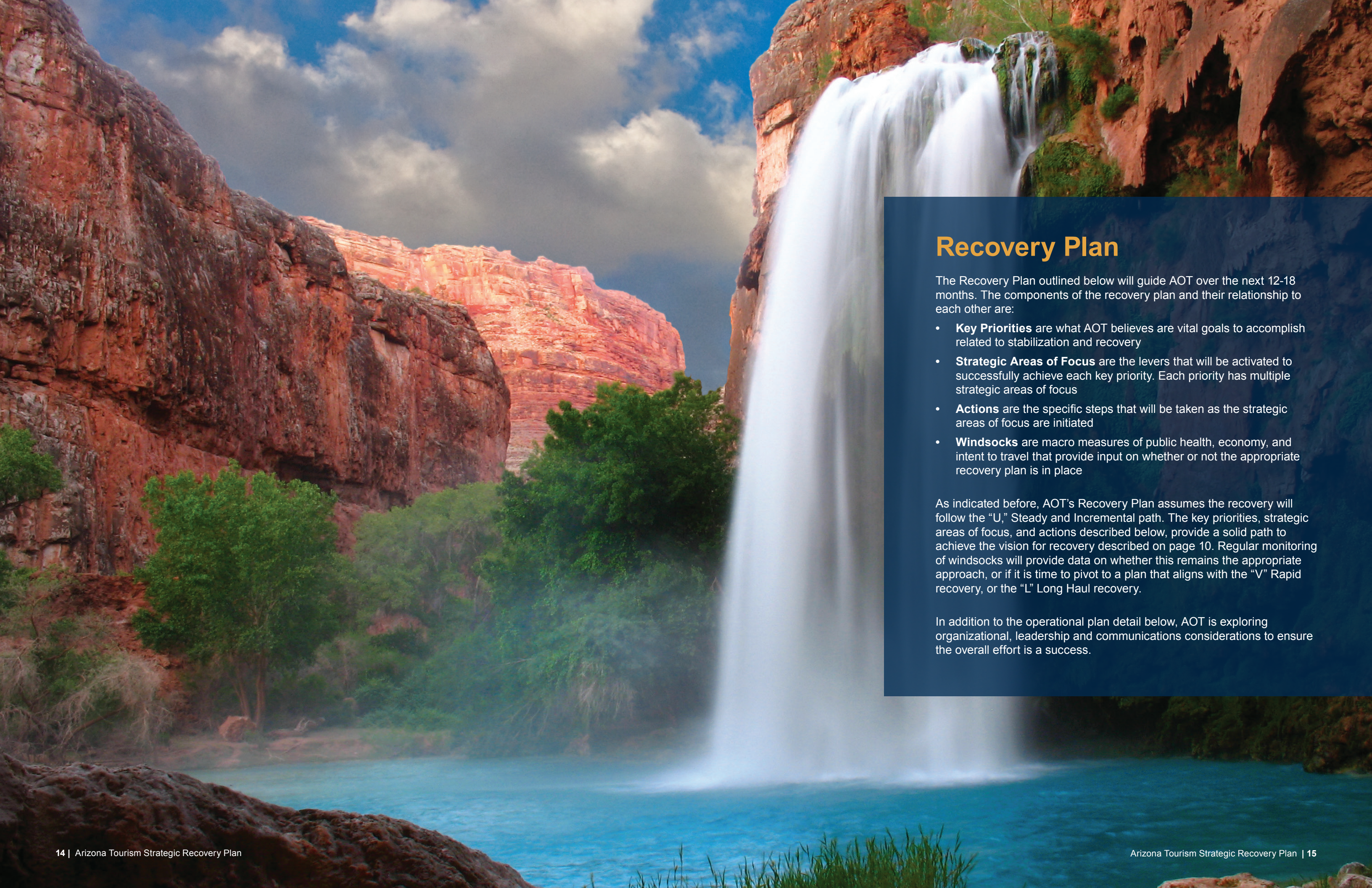
1. <https://www.forbes.com/advisor/investing/covid-19-coronavirus-recession-shape/>
2. <https://hbr.org/2020/03/what-coronavirus-could-mean-for-the-global-economy>

Decision Criteria

To help select which actions AOT proceeds with in its recovery planning, Coraggio led the Planning Team through an exercise to articulate decision criteria. This was done prior to identifying priorities, strategic areas of focus, or action items so that the measures and methods of weighing options were articulated without building in a bias toward a specific outcome. This provides greater objectivity and helps to take some of the challenges out of decision-making, especially in these uncertain times and with increasingly limited resources.

The decision criteria established by the Planning Team ensures that decisions will:

1. **Advance the mission of AOT and its commitment to ensuring tourism’s role as a driver of Arizona’s economic recovery**
2. **Support public health guidelines, making the health and safety of our residents and visitors equal priorities**
3. **Be both informed and supported by relevant data wherever possible**
4. **Emphasize actions that are scalable while at the same time balancing the unique conditions throughout the state**
5. **Honor responsible visitor principles and/or practices**



Recovery Plan

The Recovery Plan outlined below will guide AOT over the next 12-18 months. The components of the recovery plan and their relationship to each other are:

- **Key Priorities** are what AOT believes are vital goals to accomplish related to stabilization and recovery
- **Strategic Areas of Focus** are the levers that will be activated to successfully achieve each key priority. Each priority has multiple strategic areas of focus
- **Actions** are the specific steps that will be taken as the strategic areas of focus are initiated
- **Windssocks** are macro measures of public health, economy, and intent to travel that provide input on whether or not the appropriate recovery plan is in place

As indicated before, AOT’s Recovery Plan assumes the recovery will follow the “U,” Steady and Incremental path. The key priorities, strategic areas of focus, and actions described below, provide a solid path to achieve the vision for recovery described on page 10. Regular monitoring of windssocks will provide data on whether this remains the appropriate approach, or if it is time to pivot to a plan that aligns with the “V” Rapid recovery, or the “L” Long Haul recovery.

In addition to the operational plan detail below, AOT is exploring organizational, leadership and communications considerations to ensure the overall effort is a success.

Key Priority #1:

Accelerate leisure travel activity statewide

Food & Beverage

Enjoying great food and a beverage are not just a basic pleasure in travel and tourism, but also an experience in and of itself. A great restaurant or local cuisine can drive destination choice and a significant portion of visitor spend. Additionally, unique dining opportunities are differentiators between travel markets.

Food and beverage are necessities in day-to-day living regardless of travel. Making sure the food and beverage scene is supported by locals throughout these uncertain times allows this essential industry to exist and have the basis to thrive. Moreover, having the food and beverage scene in place at the future end of recovery allows it to be a generator for travel and a draw for visitors when they begin to travel again.

The actions listed below seek to position the industry to better weather these uncertain times. Through strategic partnerships, leveraging existing marketing campaigns, and empowering operators to better promote themselves, AOT can provide the leadership and guidance needed to ensure this fundamental facet of tourism is able to survive these times and continue to generate excitement for Arizona as a unique travel destination well beyond the 12-18 month recovery period.

- **Recalibrate and reinvigorate the Expedition Foodie campaign with a focus on strategic partnerships.** The Expedition Foodie campaign has sought to drive excitement in Arizona cuisine, while supporting local businesses. By providing enhanced social media content across platforms, the reach of both of these campaigns may be enhanced, reaching a broader target audience, and thus having a greater likelihood of sustaining local food and beverage providers during these times.
- **Partner with the Arizona Restaurant Association to develop and implement a digitally based education series (i.e., webinars and labs) with the goal of better equipping smaller businesses to more effectively use social media as a marketing platform.** This action seeks to empower food and beverage establishments to better market themselves using social media tools. This allows these businesses to share their presence with people, regardless of Stay-at-Home policies.
- **Partner/coordinate with DMOs statewide to develop a cohesive social media strategy aimed at educating the public on steps the state is taking to support COVID-19 public health safety protocols.** Speaking directly to the health and safety protocols that are in place will address consumer confidence and provide a greater sense of security during and beyond the recovery period. The resulting enhanced confidence and sense of personal security should translate into on-going support of those businesses.
- **Partner with relevant segments of the beverage industry to develop and implement a promotional campaign aimed at educating and motivating state residents to visit wineries, breweries, and distilleries.** Arizona has a growing beverage industry. These locations are often in more rural areas where social distancing is easier to do, making them a good destination during the pandemic. Ideas to promote Arizona's growing wine industry could include the creation of a winery passport, highlighting nearby accommodations.

Outdoor Recreation

Arizona is world renowned for its amazing and unique outdoor assets. Places like our National Parks and state parks offer opportunities to explore and bring visitors from around the world to the state. There is high regard for the state's outdoor assets, from visitors and residents alike. AOT recently forged a new partnership with the Leave No Trace Center for Outdoor Ethics to promote sustainable tourism practices across all of Arizona's spectacular landscapes and one-of-a-kind destinations.

Arizona's outdoor amenities also offer the opportunity to explore while maintaining the social distancing so important during the pandemic. These amenities will become the destinations for many staycations as Arizonans rediscover their own backyard. In fact, many parks have been seeing high visitation, even with travel restrictions in place.

The actions listed below seek to ensure the outdoor recreation assets in Arizona are stewarded by residents during this time, and that visitors engage with these places in such a way that the places are just as enjoyable when out-of-state visitation increases again. Many Arizonans are rediscovering the rich outdoors of their state, and there is an opportunity to help them form lasting connections with nature in a way that they can also understand how to protect it.

- **Develop itineraries to promote lesser-visited areas and other outdoor attractions as a means to disperse visitors across all geographies.** Arizona is rich with outdoor destinations, from marquee national parks, to local trails, to rivers and lakes, to horseback riding. Many places are well known, while others have yet to be discovered. By creating itineraries that highlight some of the to-be-discovered destinations, AOT may be able to spread visitors across a wider swath of outdoor amenities, and encourage visits while also maintaining social distancing.
- **Develop and promote educational information on what it means to be a responsible visitor.** Feedback from the April 2020 Listening Sessions highlighted that many people were exploring natural areas for the first time and may not be fully aware of what it means to be a responsible visitor. To help instill pride of place and to ensure the outdoor recreation assets of Arizona remain timeless destinations for all visitors, educational efforts will empower residents, minimize impacts, and keep destinations beautiful for years to come.
- **Promote Leave No Trace principles in strategic partnership with stakeholders and influencer organizations.** AOT partnered with Leave No Trace in June 2020. For many years, Arizona has seen increased visitation on many of its recreational lands. AOT has been seeking solutions to address the challenges that arise. Leave No Trace seeks to help inform people about their impacts on outdoor destinations and provides research, education, and initiatives to promote sustainable destination practices. By collaborating with other organizations in promoting and stewarding outdoor lands, the education and initiatives of Leave No Trace will have a broader audience and impact.
- **Further strengthen AOT's destination management role to convene partners, discuss stewardship, and listen to needs.** AOT has historically operated primarily in a destination marketing role. With the challenges brought on by the pandemic, there has been a clear need voiced by tourism stakeholders throughout the state to have a convener for many issues central to the industry. AOT is uniquely situated to step more firmly into a destination management role. Specific to outdoor recreation and to the recent partnership with Leave No Trace, AOT is positioned to listen to needs, then develop and execute integrated strategies to address immediate and emerging issues.
- **Support development of a plan that prioritizes and addresses deferred trail maintenance in a way that balances visitor dispersal across all geographies.** One major obstacle for safely engaging in outdoor recreation is the normal wear and tear of trails. With the Great American Outdoors Act being considered by Congress, and including up to \$1.9 billion annually to go toward deferred maintenance projects on federal lands, the time is right to develop a prioritized trail maintenance list that supports the other actions in this Tourism Strategic Recovery Plan. AOT can work with its state and federal partners to craft the priority list of resources that may benefit from having deferred maintenance needs addressed.

Accommodations

Arizona offers an impressive variety of accommodations for visitors, from luxury resorts, to conference hotels, to short-term rental housing, to campsites and RV parks. Accommodations are a central part of any multi-day visit.

When the pandemic was declared in March 2020, many reservations at accommodations were cancelled as essential travel became the emphasis. Many hotels and other accommodations laid off or furloughed staff, with the hope of re-opening at some point in the future. Some have stayed open as the state will begin to Rediscover Arizona.

The actions below seek to keep Arizona's accommodations open for business, address consumer confidence, and promote local experiences when people begin overnight stays.

- **Support DMO efforts to promote staycations and campaigns related to residents rediscovering Arizona.** While local DMOs are promoting stay cations and the unique offerings of their community, AOT can further promote and share their work. By working in partnership with DMOs, Arizona's myriad communities can be shared with a wider audience, many of whom may put new destinations on their list of must-see places.
- **Encourage and elevate partner efforts to develop a social media campaign that highlights stories of what individual accommodations are doing to address public health concerns.** Speaking directly to the health and safety protocols that are in place will address consumer confidence and provide a greater sense of security during these unusual days. The resulting enhanced confidence and security should translate into ongoing support of Arizona's accommodations.
- **Provide leadership and guidance toward a consistent standard of safety in accommodations.** Similar to the action above, providing and communicating a consistent standard of what may be anticipated in terms of safety, cleanliness and sanitation protocols will engender greater consumer confidence.
- **Develop a plan to tie travel experiences to other overnight options.** Bundling places to stay with nearby experiences may be one way to draw additional interest and exploration of a community and to keep a traveler in the destination longer.



Luxury Experiences

Luxury accommodations and experiences remain attractive to high-end travelers, even during a pandemic. Luxury travelers have household incomes that average \$350,000 annually, take on average 13+ trips a year, and stay from four to six days. Because of the limitations on international travel, luxury travelers are turning to domestic travel destinations. With Arizona's expansive collection of world-class accommodations and experiences, the state is positioned well to serve this segment. The offerings of peace-of-mind, solitude, and self-care have likely grown in their attractiveness given the current public health climate. Maintaining luxury offerings in Arizona during these times will maintain a consistent interest and empower these assets to help regenerate Arizona's recovery. By undertaking the actions below, AOT can execute a strategic focus on maintaining luxury travel as a means to boost the travel and tourism industry recovery.

- **Leverage resort field marketing teams for reciprocal content sharing.** By focusing on and emphasizing promotions of those resort accommodations that offer the safety of seclusion, AOT can have confidence that the assets being shared will meet the needs of a public that yearns to travel safely. By working in partnership with field marketing teams, Arizona's luxury gems can be shared with a wider audience.
- **Develop and implement a media relations campaign aimed at strengthening Arizona's reputation as a luxury destination.** At this time, travel may be out of reach for many people, especially as unemployment has increased during the pandemic and disposable income has been reduced. It is likely this impact has not been felt by those individuals for whom luxury travel has been typical prior to the pandemic. By growing and promoting Arizona as a luxury destination, Arizona will be on the radar of those individuals who are more readily able to travel.
- **Develop new educational material for concierge groups.** The pandemic has altered how people interact with a place, and what destinations are open and available. Providing current information to concierge groups allows them to share day trip ideas with guests, ensuring that they are well taken-care of while in Arizona. Further, concierge groups can be provided with Leave No Trace materials to share to their clientele.



Key Priority #2:

Stabilize visitor volume in urban centers



Resorts/Hotels

Urban resorts and hotels provide a place to stay for leisure and business travel. With both these markets negatively affected by the pandemic, attention is needed to stabilize this facet and ensure it is in place as travel resumes. When the pandemic was declared in March 2020, many reservations at accommodations were canceled as essential travel became the norm. Many hotels and other accommodations laid off or furloughed staff, with a hope to be able to re-open in the future. Resorts and hotels have been hard hit by the pandemic, and need attention during recovery.

The actions below seek to keep Arizona's accommodations open for business, address consumer confidence, and promote local experiences when people begin overnight stays.

- **Partner with local governments and DMOs to promote staycations and campaigns related to Rediscovering Arizona.** While local DMOs are promoting staycations and the unique offerings of their community, AOT can further promote and share their work. By working in partnership with local governments and DMOs, the diversity and uniqueness of Arizona's communities can be shared with a wider audience.
- **Encourage and elevate DMO efforts to develop social media campaign that highlights stories of what individual accommodations are doing to address public health concerns and other stories that celebrate the good in the world.** Speaking directly to the health and safety protocols that are in place will directly address consumer confidence and provide a greater sense of security during these unusual days. The resulting enhanced confidence and security should translate into ongoing support of Arizona's urban resorts and hotels.



Attractions

Many people who travel seek experiences such as sporting events, museums, and cultural and heritage sites. Like other facets of tourism, attractions have been hit hard by the pandemic. Many have closed and have no estimated time of reopening (as of this writing). This is especially true for venues that can accommodate large gatherings, like Arizona Cardinals Stadium and other sports arenas. Not only does the closure of the facility cause a direct spending loss, but the facility typically generates significant other indirect spending in-market at local restaurants, bars, and hotels.

The actions described below seek to bring new interest to attractions and instill greater visitor confidence in them, once they are open and available.

- **Conduct statewide inventory of attractions and determine safety status.** A central list of all of Arizona's key attractions and how they are addressing public safety would go a long way to instilling greater confidence and sense of security in the actions being taken to open and share Arizona's attractions. Additionally, this will help Arizona to compete on "safety," which will likely be a strategy for many other states.
- **Enhance partnerships between attractions and educational institutions to provide content while doing distance learning.** When the pandemic was declared, most educational institutions shifted to home-based distance learning. There is an opportunity for attractions to share their history and culture with those individuals who are schooling from home by providing content.
- **Support attractions' efforts to develop virtual material to promote and maintain awareness.** Many attractions, especially museums, have been working to shift some of their collections to be visible online so patrons can appreciate them from afar. Doing this allows people who are interested in an attraction to stay connected despite not being able to travel to it. When travel is again an option, it is likely that people will visit those attractions that were part of their awareness during the pandemic.
- **Collaborate with attraction alliances to develop and promote campaigns that make attractions accessible to different populations and interests.** This action seeks to make attractions available in new ways to new populations. This may include campaigns such as renting facilities for private events, or developing a local attraction passport to encourage people to visit all their local attractions.



Sports

Arizona is rich with sports experiences for visitors and residents alike. Be it one of our Arizona professional sports teams, the Cactus League, college sports, or youth sports, Arizona has been a destination for sports players and fans for years. Events have drawn people for multi-day trips to stay at accommodations, enjoy local cuisine, and explore the local community.

With the declaration of the pandemic in March, sports-related events have been cancelled or postponed in light of the public health safety risk. It is unknown when team sports will resume with an audience, meaning that this facet of Arizona tourism may experience a longer-term negative impact from the pandemic.

The actions described below seek to find ways to maintain the sports industry in Arizona and to meet the public's desire to have team sports take place.

- **Support creation of marketing campaigns with local sports player or mascot that promote Arizona and a personal connection.** Many Arizonans feel a strong connection to their local sports teams. One way to engender excitement for teams and for Arizona while the pandemic affects daily lives is to collaborate and have a sports mascot visit Arizona destinations and share their experiences via social media. This could also be done with star players.
- **Support partner FAMs to promote youth and amateur sports.** While there is some youth and amateur sports taking place in Arizona, Arizona can support FAMs to entice more to have future competitions in the state. Contingent on budget.
- **Support winter and spring training for major league soccer and baseball.** Baseball's Spring Training—the Cactus League—brings players from across the U.S. to Arizona to practice and play. Similarly, Major League Soccer winter training brings players and teams from around the world to Arizona. There is time to plan for safe winter/spring 2021 practice seasons and to bring this excitement back to the state.



Meetings, Conventions, and Business Travel (contingent on budget)

Meetings, incentives, conferences, events, and other business travel make up a large portion of travel to urban areas. This is typically a reliable source of travel, hotel stays, and brings indirect spending to local food & beverage establishments and retail stores. The onset of the pandemic negatively affected this facet of travel. While AOT historically has focused on leisure travel, if budget becomes available, AOT will focus on helping to accelerate the return of business travel, as it is central to stabilizing visitor volume in urban areas. The actions described below outline what could be accomplished, if budget allows:

- **Support FAMs with major meeting planners and third-party planners to showcase meeting space and public safety measures.** As business travel resumes under a new reality, showcasing innovative measures and public health and safety standards could distinguish the state from others. Further, if social distancing remains the norm during the recovery period, Arizona may take steps to explore how its comfortable weather can accommodate outdoor events year-round.
- **Support development of marketing campaigns about the economic impact and value of business travel.** Educational materials regarding the ROI in travel and tourism marketing can help secure additional funding for such efforts. Further, as the general public sees and understands the positive impact travel has on their local government tax revenue, there may be growing support for the work. Similar materials were developed by AOT after the last recession, and can be used to help jump-start this effort now.
- **Participate in tradeshow and events like IMEX with Arizona branding.** As DMO budgets are reduced across the state, AOT is positioned to support branding of the state and its cities at larger events like IMEX. This action will help enhance the awareness of Arizona as a world-class meeting destination.
- **Support hotel partner efforts to be more attractive to business travel.** AOT can survey its hotel partners to better understand their needs in attracting business travel, then develop a plan of action for helping address those needs.





Key Priority #3:

Reinvigorate and strengthen tourism in rural and Tribal areas

Educate travelers to rural communities with emphasis on responsible visitor principles

With social distancing being promoted as a measure to maintain public health during the pandemic, it is likely that rural destinations could see more visitors than usual. These communities may need additional communication and education support.

The actions described below seek to bolster the ability of rural and Tribal areas to meet demand for visitation during these unprecedented times.

- **Share information with travelers and residents in communities regarding safety protocols and rules of using outdoor recreation facilities.** Many rural and Tribal communities may have visitors come to enjoy their outdoors. Similar to efforts outlined elsewhere in the Plan, ensuring visitors have access to educational information on what it means to be a responsible visitor will be important for the long-term preservation of these assets.
- **Promote Leave No Trace principles and share success stories.** AOT partnered with Leave No Trace in June 2020. For many years, Arizona has seen increased visitation on many of its recreational lands. AOT has been seeking solutions to address the challenges that arise, including those tied to resident sentiment around over-tourism. Leave No Trace seeks to help inform people about their impacts on outdoor destinations and provides research, education, and initiatives to promote sustainable destination practices. The principles of Leave No Trace should be shared in the trip planning process, the booking process, and multiple points throughout their trip, such as trailheads and visitor centers.
- **Partner with stakeholders to mutually reinforce the message around being a responsible visitor and best practices.** The partnership with Leave No Trace provides a clear point of beginning to share mutually reinforcing messages around being a responsible visitor. AOT can look to additional partners as the program grows and evolves to further disseminate the messages about sound stewardship of rural areas.
- **Leverage guides' and outfitters' role as ambassadors between communities and visitors to share messages and listen for emerging concerns.** Outfitters have a unique role in Arizona's tourism as connectors between travelers and the communities that welcome them. Outfitters seek to have the communities in which they operate thrive and be sustained by the travelers they bring in. As such, guides and outfitters are uniquely situated to hear and communicate the needs and concerns of communities. This role should be leveraged to ensure AOT and other partners hear and can respond to needs.

Partner with DMOs to customize promotion of destinations

The needs of rural tourism are different from urban tourism. Rural and Tribal communities often have more of their local economy dependent on tourism, so any change in tourism is felt more acutely. Additionally, the staffing levels at rural DMOs may not be as robust as those in urban areas, and one person may be responsible for many of the strategic priorities of their organization.

In the recovery period ahead, there is a potential for rural areas to be the preferred choice for many travelers, and the areas may not be as well situated as urban areas to meet all the visitor needs. The actions identified below seek to partner with DMOs to help customize destination promotion, and ensure the unique issues of rural destinations are addressed.

- **Assess and recalibrate the rural cooperative program to ensure it delivers maximum value, including exploration of expanding the regional co-op model.** AOT's Rural Marketing Co-Op Program provides tools and resources to rural and Tribal destinations to market themselves. Needs of rural and Tribal communities may have shifted as a result of the pandemic, and the provisions of the Co-Op program should shift accordingly. Additionally, AOT can take the opportunity to explore expanding the Co-Op program to include greater opportunities for regional efforts in which many small jurisdictions come in together for a joint focus.
- **Continue education at the annual Governor's Conference on Tourism (GCOT) that focuses on rural tourism, and continue roundtables throughout the coming year and develop a supporting rural toolkit.** GCOT currently has a Tribal roundtable and a rural tourism educational component. Building upon this effort and offering a roundtable specific to rural destinations will provide an avenue for AOT to hear directly what their needs and issues are and be able to support them in a meaningful way.
- **Develop and promote package sales of a non-refundable hotel stay and voucher for local attractions and/or restaurants.** Bundling places to stay with nearby attractions and restaurants may be one way to draw additional interest and exploration of a community and to keep a traveler in the destination for longer. AOT may host a training webinar to facilitate execution of this action as well as continuing to partner with organizations that are presently doing this.



Outdoor Recreation

Arizona is world renowned for its amazing and unique outdoor assets. There is high regard for the outdoor assets of the state, from visitors and residents alike. AOT recently forged a new partnership with the Leave No Trace Center for Outdoor Ethics to promote sustainable tourism practices across all of Arizona's spectacular landscapes and one-of-a-kind destinations.

Arizona's outdoor amenities also offer the opportunity to explore the state while maintaining the social distancing so important to protecting public health. These amenities will become the destinations for Arizonans to rediscover their own backyard. In fact, many national and state parks have been seeing increased visitation, even with travel restrictions in place.

The actions listed below seek to ensure the outdoor recreation assets in Arizona are embraced by residents during this time, to protect our lands for when out-of-state visitation increases again. Many Arizonans are discovering the rich outdoors of their state, and there is an opportunity to help them understand how to protect it.

- **Develop itineraries to promote lesser-visited areas and outdoor attractions as a means to disperse visitors across all geographies.** Arizona is rich with outdoor destinations, from marquee national parks, to local trails, to rivers and lakes, and horseback riding. Many places are well known, while others have yet to be discovered. By creating itineraries that highlight some of the to-be-discovered destinations, AOT may be able to better disburse visitors across our state, and thus find a way to encourage visits while also maintaining social distancing.
 - **Develop and promote educational information on what it means to be a responsible visitor. Feedback from the April 2020 Listening Sessions highlighted that many people were exploring natural areas for the first time and may not be fully aware of what it means to be a responsible visitor.** To help instill pride of place and to ensure the outdoor recreation assets of Arizona remain timeless destinations for all visitors, educational efforts will minimize impacts and keep destinations beautiful for years to come.
 - **Promote Leave No Trace principles in strategic partnership with stakeholders and influencer organizations.** AOT partnered with Leave No Trace in June 2020. For many years, Arizona has seen increased visitation on many of its recreational lands. AOT has been seeking solutions to address the challenges that arise. Leave No Trace seeks to help inform people about their impacts on outdoor destinations and provides research, education, and initiatives to promote sustainable destination practices.
- By collaborating with other organizations with deep roots in promoting and stewarding outdoor lands—REI, Keep Nature Wild, Bureau of Land Management, and National and State Parks—the education and initiatives of Leave No Trace will have a broader audience and impact.
- **Partner with the other Four Corners states to develop joint marketing and itineraries.** The Four Corner states—Arizona, Colorado, New Mexico, and Utah—are often visited together. As states make headway in the pandemic and travel returns, having a connection with neighboring states may be the next step. Partnering with the Four Corners states to market to and with each other would benefit the recovery of each state.
 - **Develop campaigns that support rural tourism in destinations along the Arizona National Scenic Trail and along the to-be-completed Sun Corridor Trail.** There are two significant trails crossing Arizona: the Arizona Trail and the to-be-completed Sun Corridor Trail. There is an opportunity to promote the small communities and their assets that are along these trails. Doing so could leverage the travelers to these trails and bring them into nearby towns for additional exploration.

Partner with Tribal Communities

Tribal Communities are home to some of Arizona's most stunning attractions and history. These areas have been major destinations, especially for international travelers, for many years.

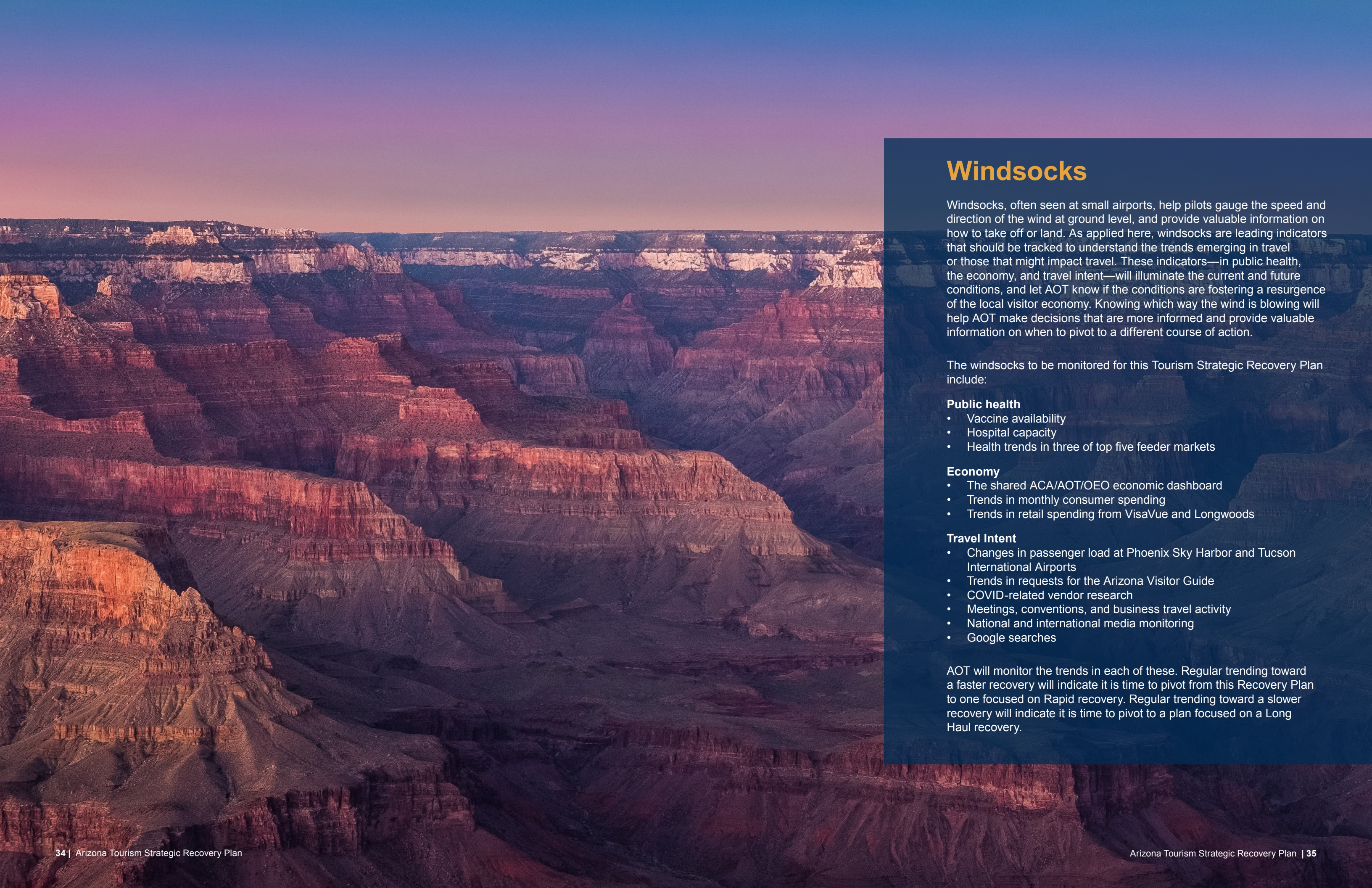
Not only has the pandemic brought tourism to a halt, but it has also harmed Tribal populations disproportionately. Bringing tourism back to Tribal communities must be led by the Tribes, with AOT actively supporting the effort. AOT can collaborate to develop a Tribal-specific recovery engagement strategy that responds to the unique needs of these communities as they navigate forward.

While tribes will have special needs in opening tourism activities to the public, we understand openings will take place at different rates depending on various factors at the Tribal level. Tribes should participate in all programs when they feel ready.

AOT will begin with the following steps toward a Tribal recovery engagement strategy:

- Present the Recovery Plan to Tribal communities, Tribal leadership, and Tribal enterprises to solicit input and identify specific tourism needs
- Provide continuous communication using various methods to keep Tribes informed of AOT's program updates
- Identify areas where AOT programs can provide flexibility for Tribal communities
- Identify specific AOT programs that might provide the most traction to Tribal tourism recovery
- Support and communicate with Tribes as they enter their recovery phase





Windsocks

Windsocks, often seen at small airports, help pilots gauge the speed and direction of the wind at ground level, and provide valuable information on how to take off or land. As applied here, windsocks are leading indicators that should be tracked to understand the trends emerging in travel or those that might impact travel. These indicators—in public health, the economy, and travel intent—will illuminate the current and future conditions, and let AOT know if the conditions are fostering a resurgence of the local visitor economy. Knowing which way the wind is blowing will help AOT make decisions that are more informed and provide valuable information on when to pivot to a different course of action.

The windsocks to be monitored for this Tourism Strategic Recovery Plan include:

Public health

- Vaccine availability
- Hospital capacity
- Health trends in three of top five feeder markets

Economy

- The shared ACA/AOT/OEO economic dashboard
- Trends in monthly consumer spending
- Trends in retail spending from VisaVue and Longwoods

Travel Intent

- Changes in passenger load at Phoenix Sky Harbor and Tucson International Airports
- Trends in requests for the Arizona Visitor Guide
- COVID-related vendor research
- Meetings, conventions, and business travel activity
- National and international media monitoring
- Google searches

AOT will monitor the trends in each of these. Regular trending toward a faster recovery will indicate it is time to pivot from this Recovery Plan to one focused on Rapid recovery. Regular trending toward a slower recovery will indicate it is time to pivot to a plan focused on a Long Haul recovery.



Collective Impact

Collective Impact is the commitment of a group of actors from different sectors to a common agenda for solving a specific social problem, using a structured form of collaboration. —Wikipedia

The Collective Impact Model will form the basis for ongoing management of the plan. While AOT will lead the Recovery effort, the State's recovery is a collective responsibility. This means numerous partners will contribute to and own the recovery. Active and open partnership between all stakeholders and AOT need to be a priority. AOT is willing to serve as lead partner to make this Recovery Plan a reality.

Internally, AOT will utilize two cross-functional teams to operationalize the Recovery Plan. One will focus on urban recovery actions while the other will focus on rural recovery actions. These teams will ensure that partners come together on a regular basis to share progress, course-correct, and strategize next steps. It is important to note that at times the teams will lead efforts, will collaborate with others, or will support their partners as they lead a particular action.

Partners

Partner organizations for the Recovery Plan include, but are not limited to:

- Other state agencies, including Arizona State Parks
- DMOs, economic development organizations, and local governments
- Federal agencies such as the National Park Service and Bureau of Land Management
- Food and beverage organizations, including Arizona Restaurant Association
- Lodging partners, including Arizona Lodging & Tourism Association
- Arizona Sports and Tourism Authority
- Tribal Communities
- Four Corners States (UT, CO, NM)
- Listening Session Advisory Panel members

Continuous Communication

The information below is not meant to be static, but rather a point of beginning for the continuous communications and Recovery Plan implementation. Additional meetings and actions will be incorporated as the 12-18 month period unfolds and new needs are identified.

Initial Actions

- Initiate internal action teams and develop their charters
- Maintain the Tourism Tuesday email communication with enhanced focus on these priorities
- Begin internal communication of recovery progress

Shifts

- Increased destination management partnership for purposes of statewide recovery
- Increased collaboration/liaison to urban and rural communities to help accelerate recovery

Year One Meeting Cadence

- Governor’s Conference on Tourism
- Rural roundtables
- Regular check-ins with industry partners
- Regular convening of internal action teams
- Semi-annual summit with the Listening Session Advisory Panel members



Appendix



Arizona Office of Tourism

Destination Recovery Plan

Insight Report
Executive Summary
May 15, 2020
Presented by: Coraggio Group

In response to the COVID-19 pandemic, the Arizona Office of Tourism (AOT) is developing a Destination Recovery Plan to accelerate the recovery of travel and tourism throughout the state over the next year.



In order to craft the Destination Recovery Plan, the current state needs to be established, and key themes upon which to focus identified. To do this, a series of 10 one-hour Listening Sessions were conducted by Coraggio Group on behalf of AOT between April 23rd to April 30th.

The purpose of these sessions was to glean insights from 25 tourism partners at this point in time regarding:

- Current state
- Issues specific to a sub-region of Arizona
- Issues specific to a tourism sector
- Thoughts on what the future may hold
- What they need from AOT

Key themes that emerged from the Listening Sessions include:

- 1 Tourism partners are looking for AOT to continue to be the great leader it has been and to take on new roles for the state and its recovery.
- 2 A consistently communicated statewide base-level of practice to protect the health of visitors, the employees, and residents will be central to assuaging public fears of travel (and of travelers) and will strengthen consumer confidence, even if shutdowns occur in waves.
- 3 DMOs are very proud of their destinations and want to share theirs with Arizona residents.
- 4 Leveraging Arizona's abundance of outdoor experiences will accelerate the state's recovery and be the first driver of travel and tourism.
- 5 Sustaining the food, beverage, and retail industries through the Stay Home, Stay Safe, Stay Connected executive order will be critical to each stage of recovery.
- 6 The impact of the pandemic on the accommodations industry not only affects this industry, but also impacts DMOs and community housing markets.
- 7 MICE Market Activity will likely resume with increased significance toward the end of 2020 (at the earliest) and into the future.
- 8 The pandemic has dramatically affected stakeholder funding and budgets statewide, particularly tourism management organizations such as DMOs.
- 9 While the entire state has been negatively affected by the pandemic, the travel and tourism economy in rural areas and Tribal communities experience the impacts in ways that need special consideration and action.
- 10 The impacts and the strategic actions needed to bolster Arizona's tourism economy will differ depending on the unique mix of attributes that comprise local tourism economies.





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