



Research Update

December 10, 2020

Agenda

- Visitation Trends
- Spending Impacts of COVID-19
- Lodging and Home Sharing Trends
- Updated Tourism Indicators
 - Gross Sales
 - Parks Visitation
 - Air Passengers
- Post-COVID Visitor Profile
- County Visitation Trends

Domestic Overnight Visitation To AZ



Source: Tourism Economics

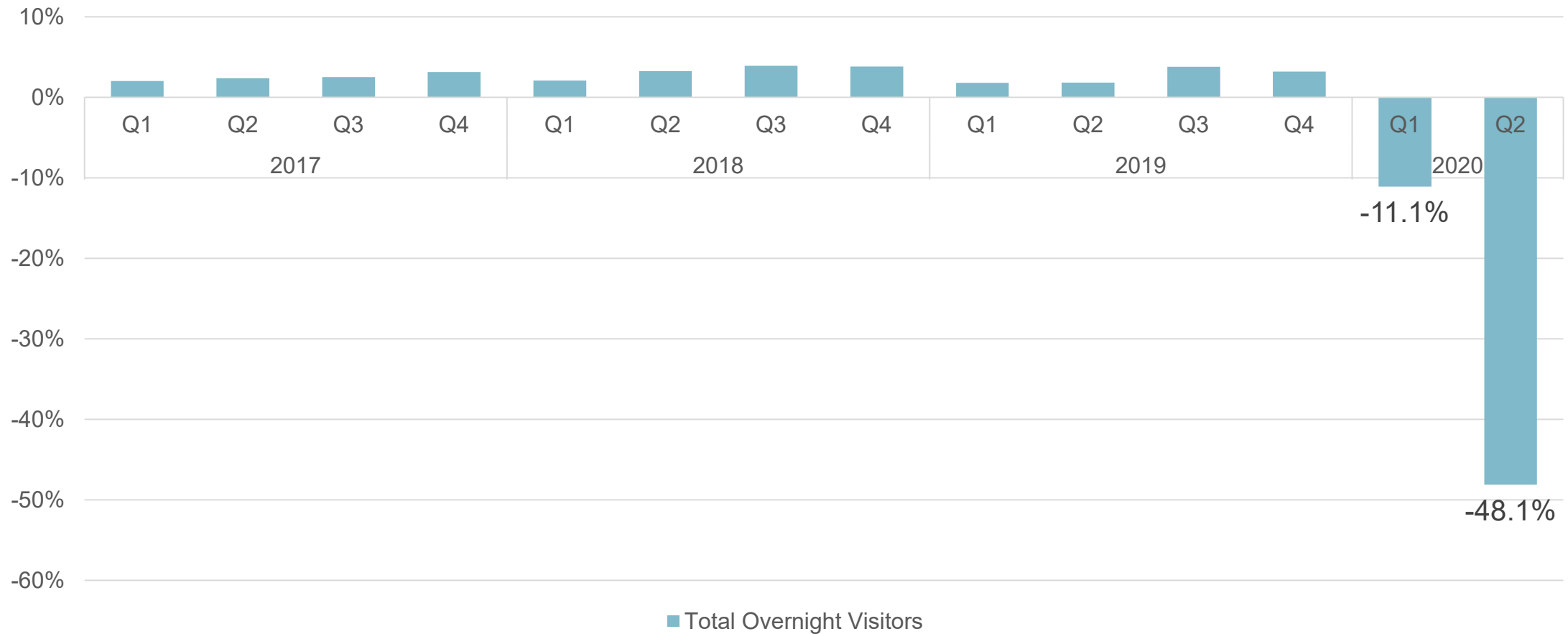
Domestic Overnight Visitation To AZ



Source: Tourism Economics

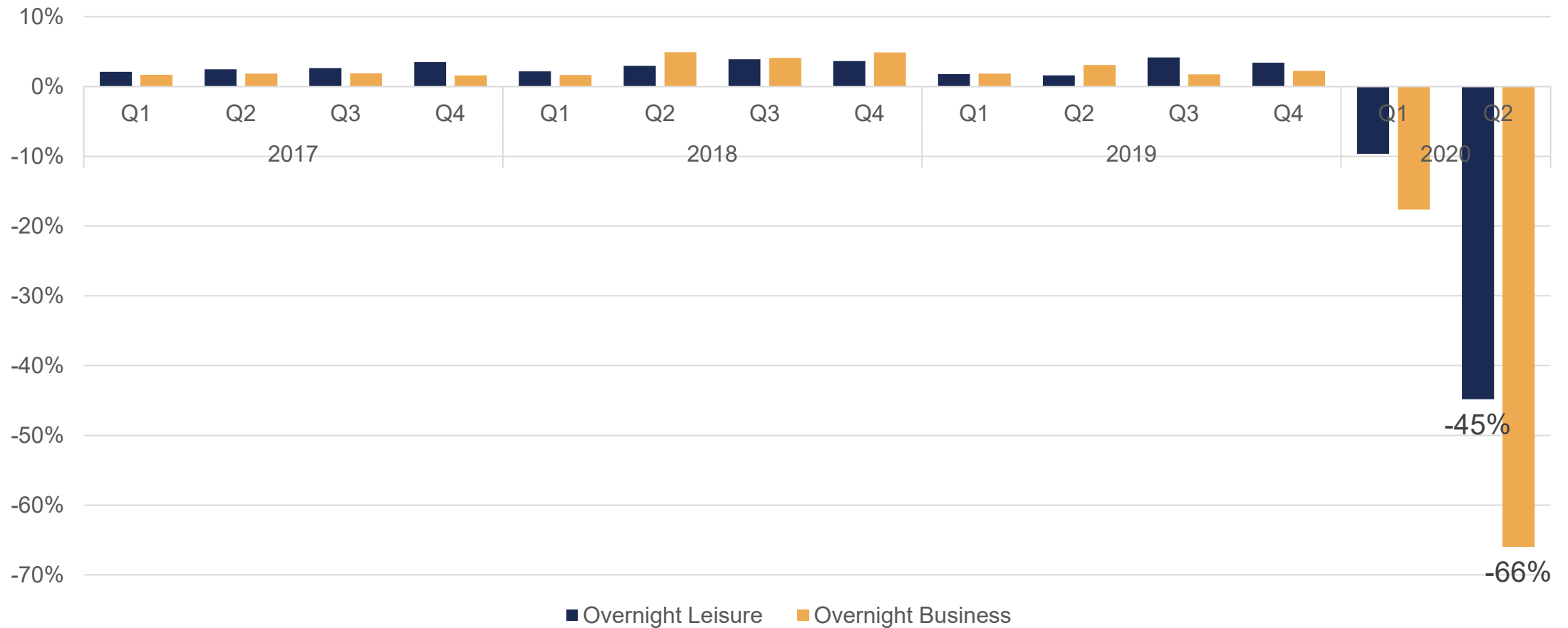
Domestic Overnight Visitation To AZ

YOY % Change



Domestic Overnight Visitation To AZ

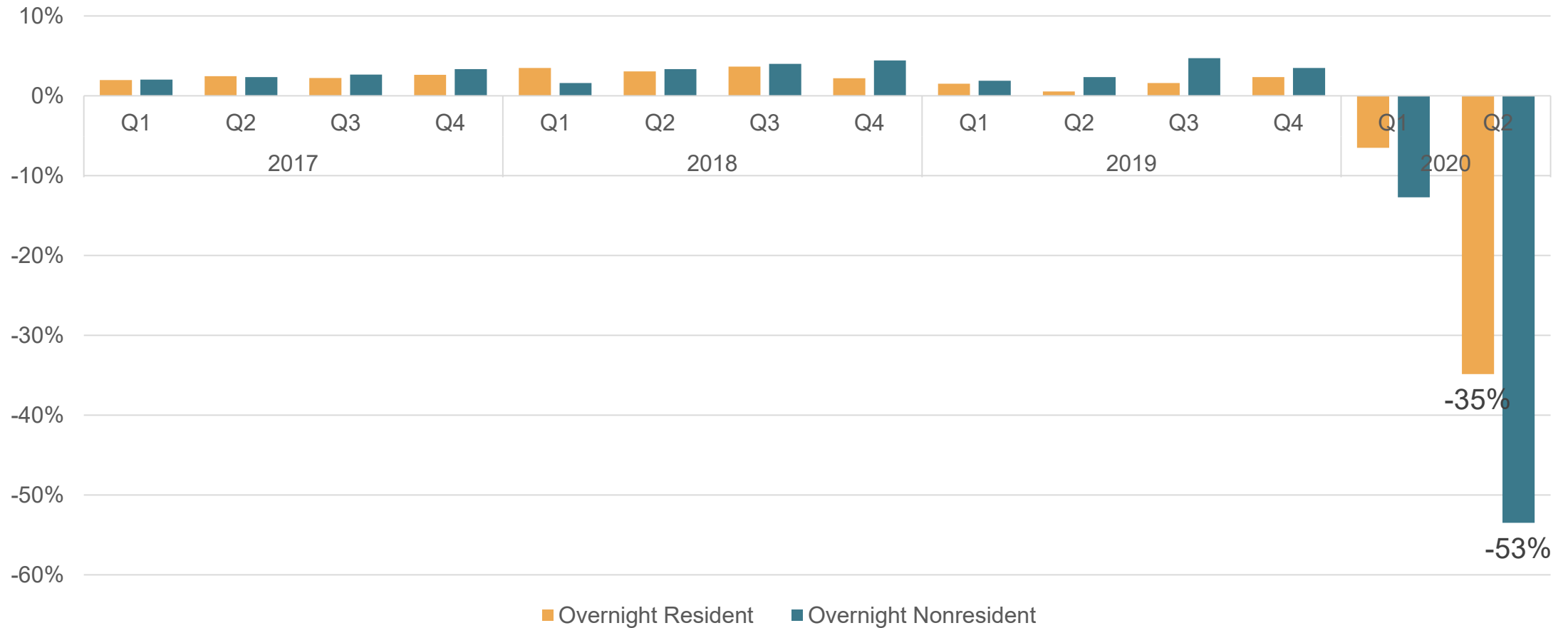
YOY % Change



Source: Tourism Economics

Overnight Visitation To AZ

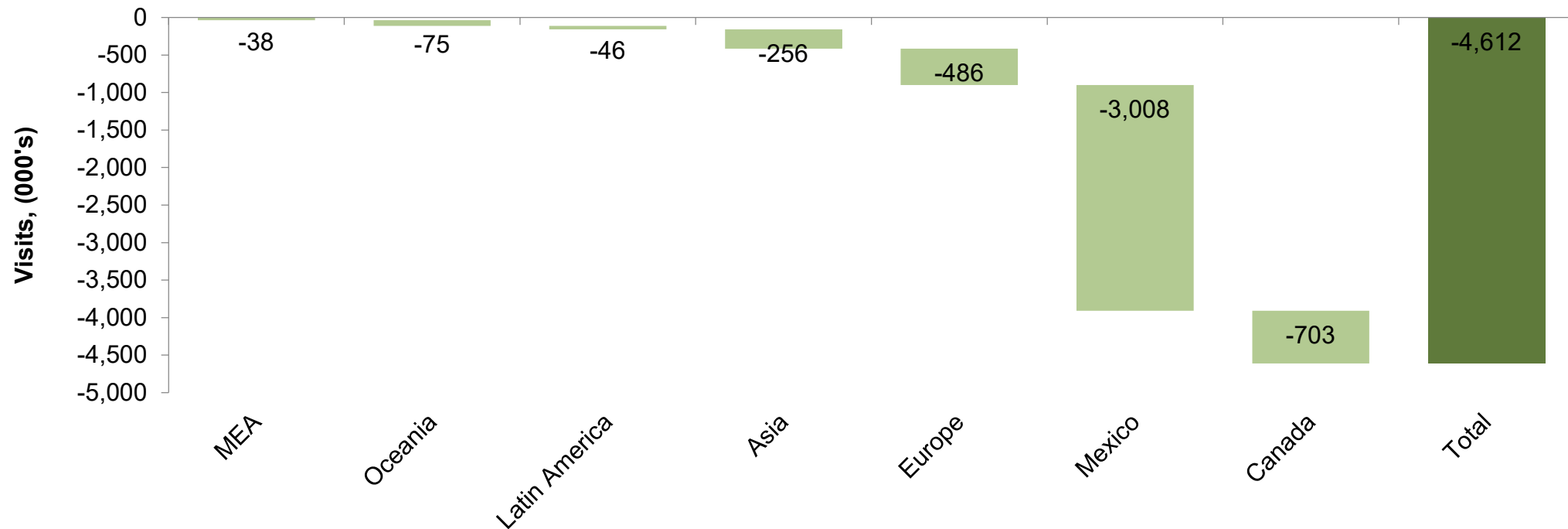
YOY % Change



Source: Tourism Economics

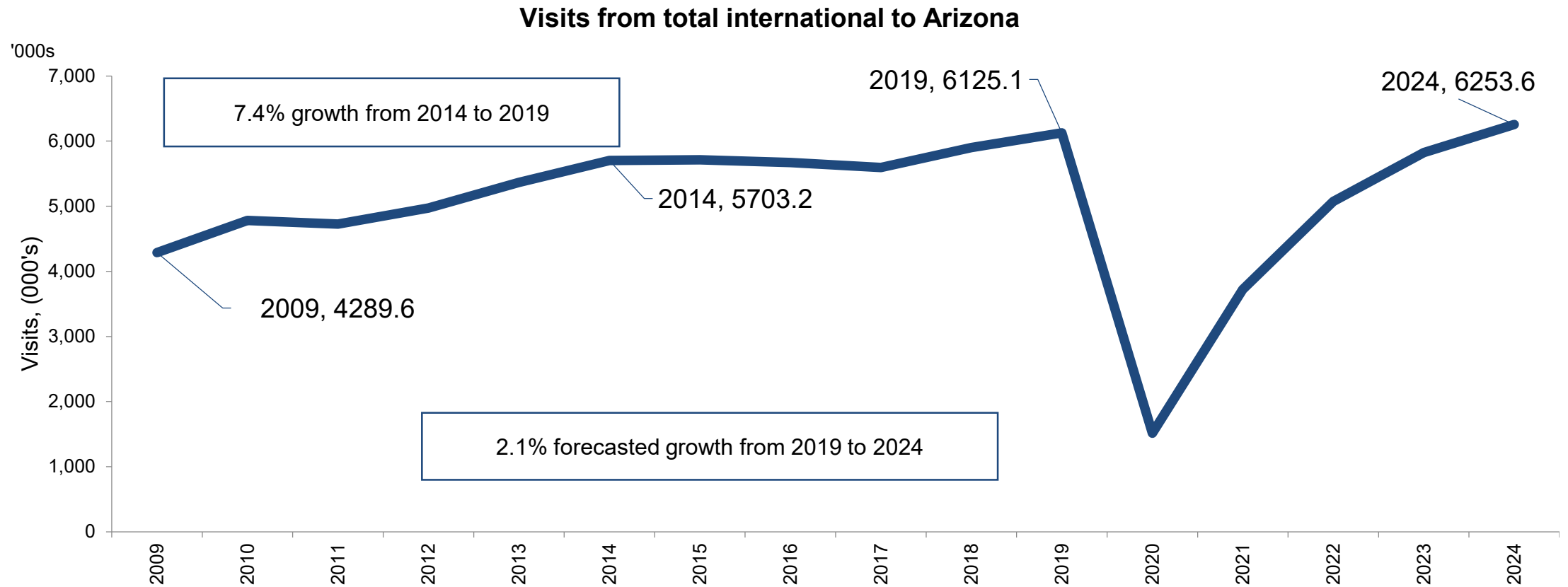
International Visitation

Declines in 2020 international visitation to Arizona



Source: Tourism Economics, forecast date 9/4/2020

International Visitation



Source: Tourism Economics

Source: Tourism Economics, forecast date 9/4/2020

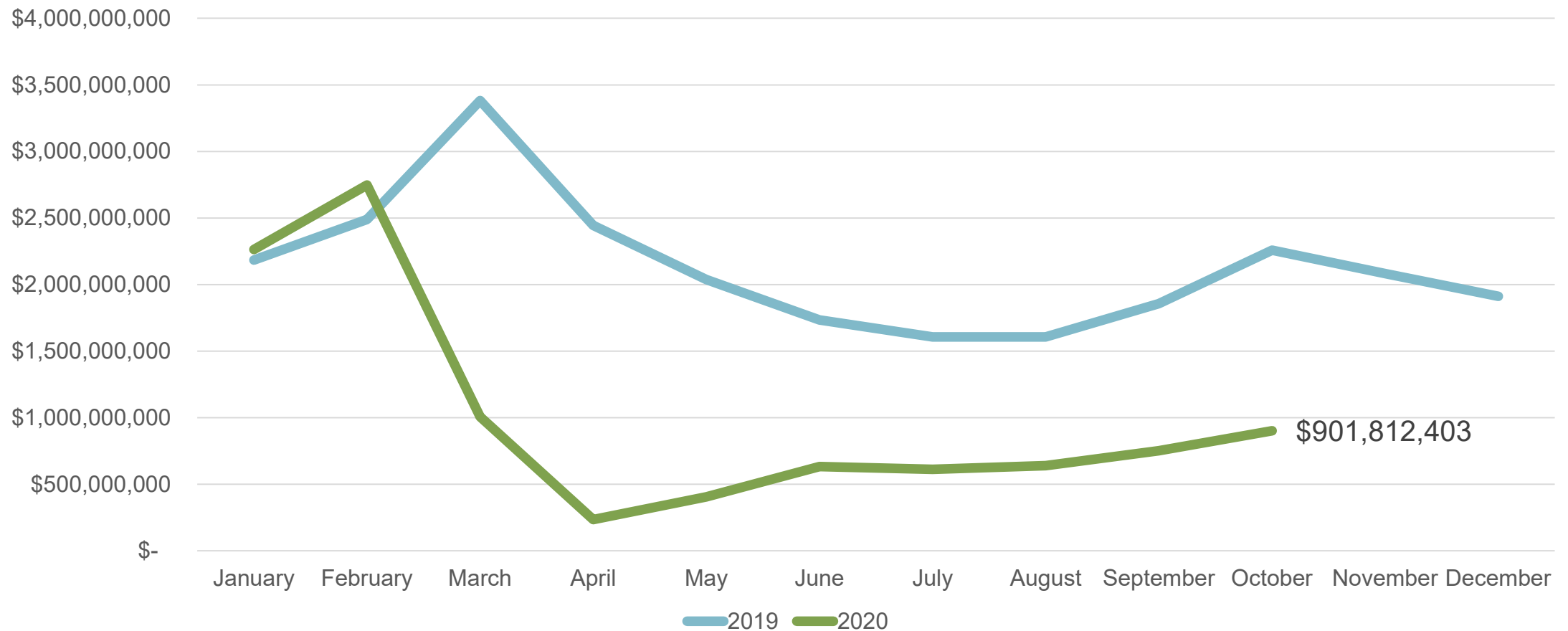
International Spending Forecast

	Spending, millions		
	2019	2020	2021
Total	\$4,604	\$1,136	\$2,728
Overseas	\$2,044	\$443	\$1,008
Canada	\$1,044	\$293	\$720
Mexico	\$1,516	\$400	\$1,000
Europe	\$898	\$192	\$421
Asia	\$711	\$158	\$383
Latin America	\$118	\$26	\$56
Oceania	\$136	\$29	\$67
MEA	\$182	\$39	\$79

Source: Tourism Economics, forecast date 9/4/2020

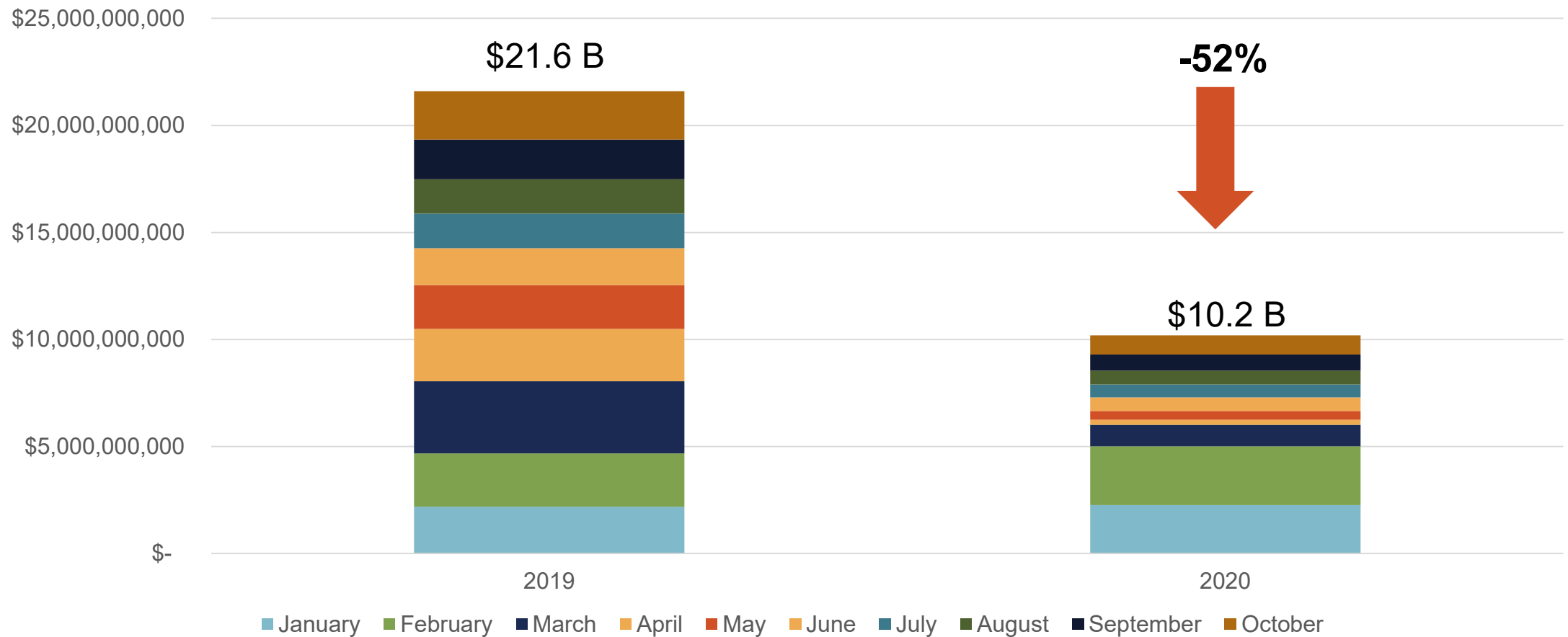
Visitor Spending Impacts

Travel Spending in Arizona



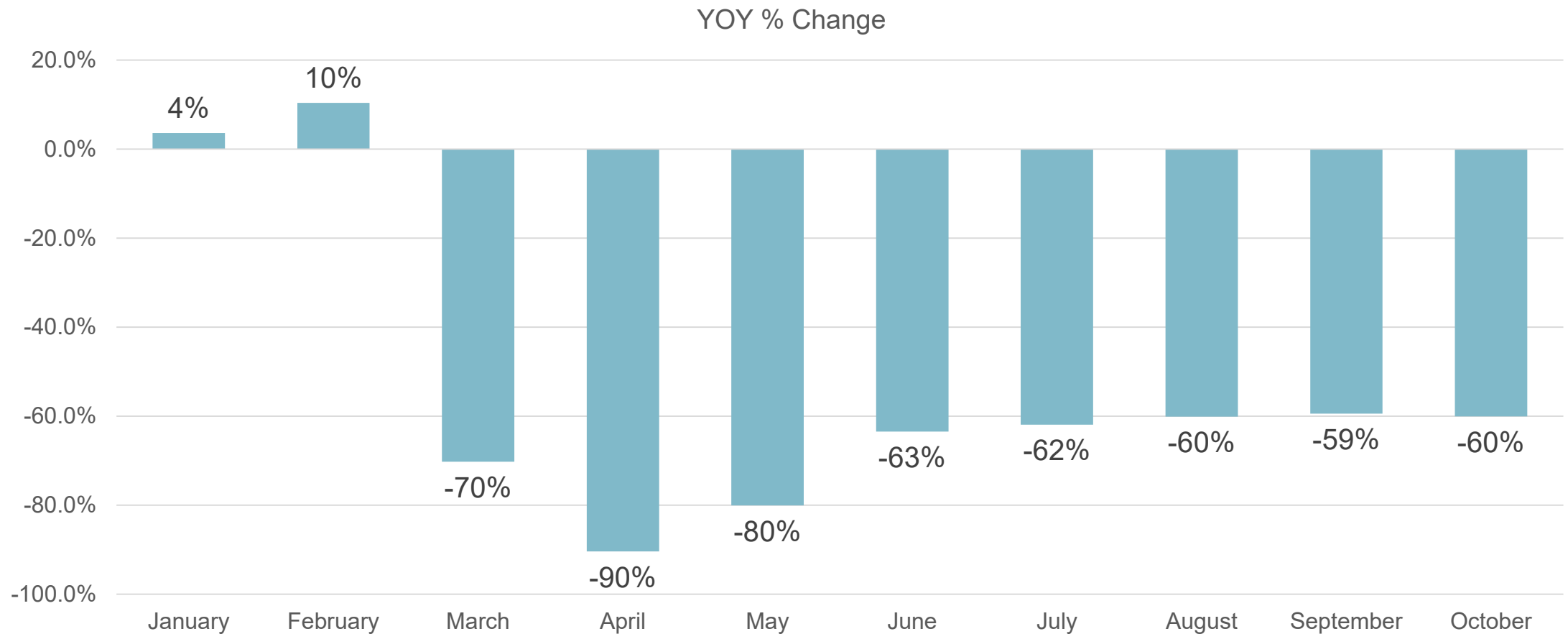
Source: Dean Runyan Associates

Travel Spending in Arizona



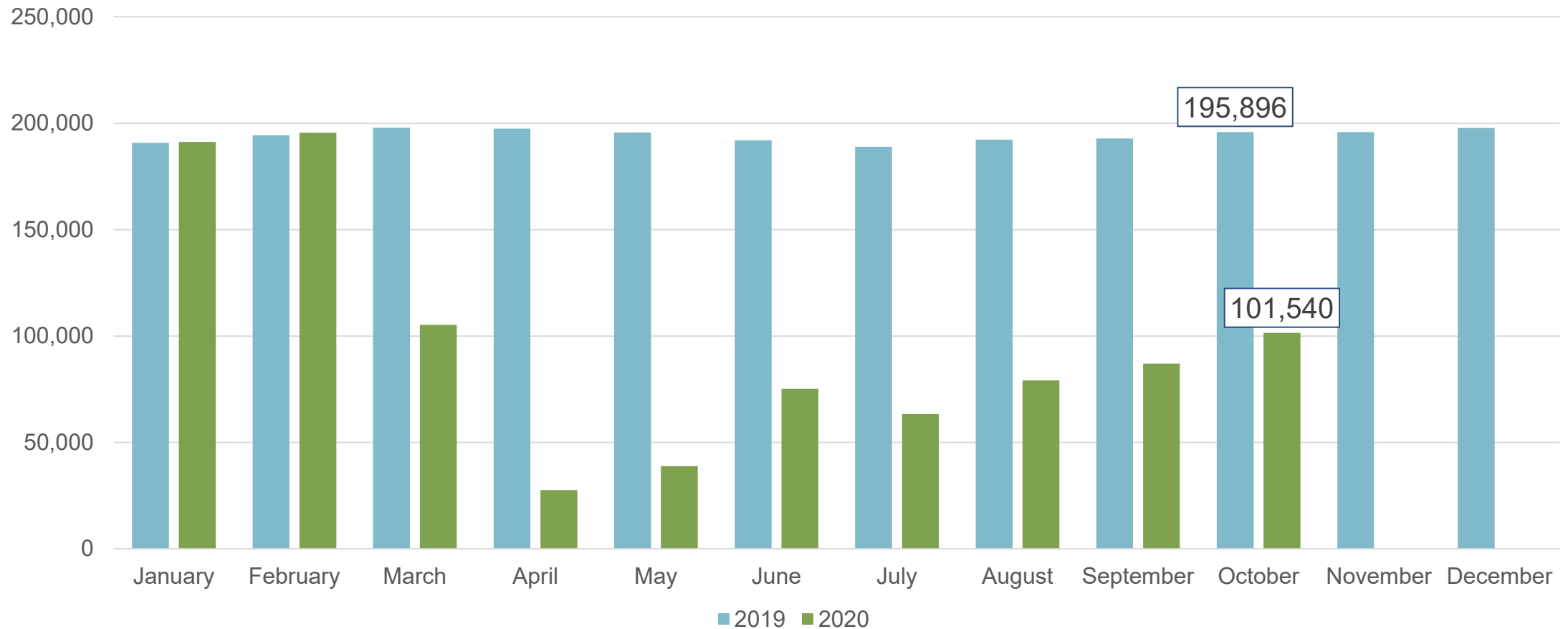
Source: Dean Runyan Associates

Travel Spending in Arizona



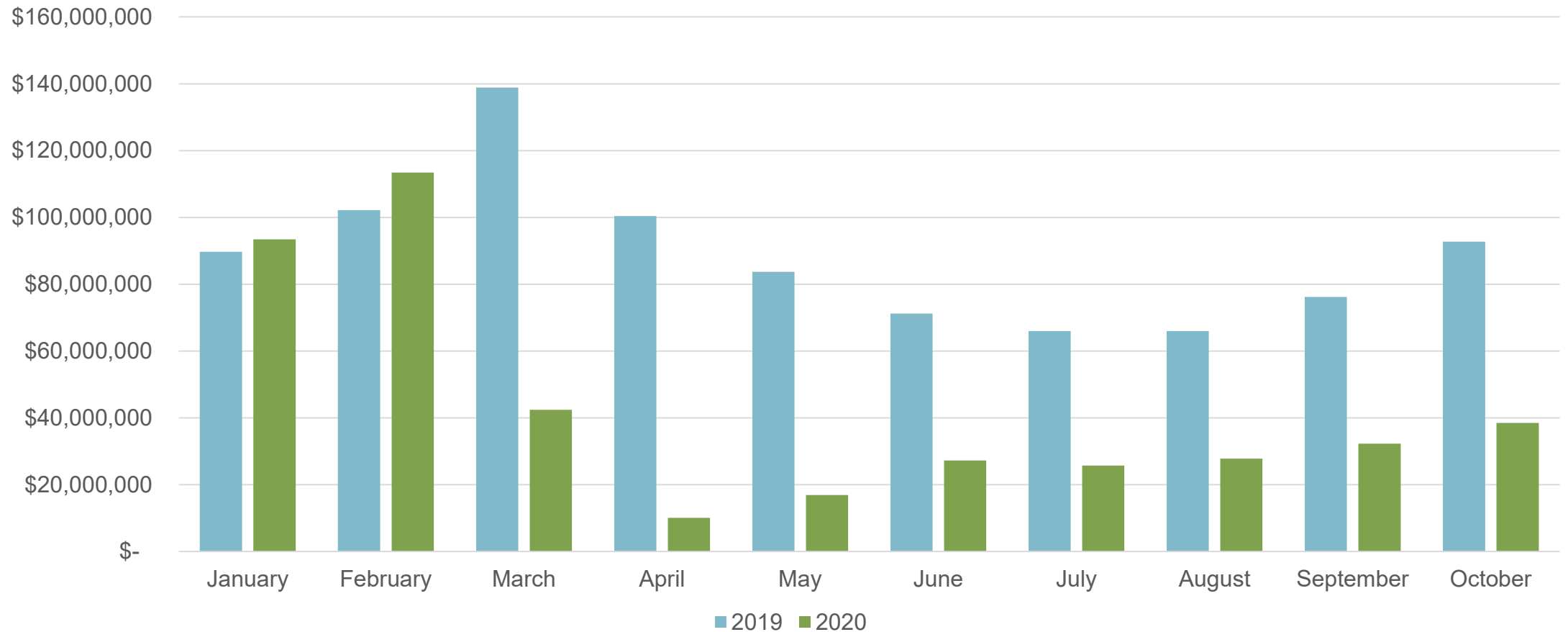
Source: Dean Runyan Associates

Monthly Travel Jobs Supported by Travel Spending



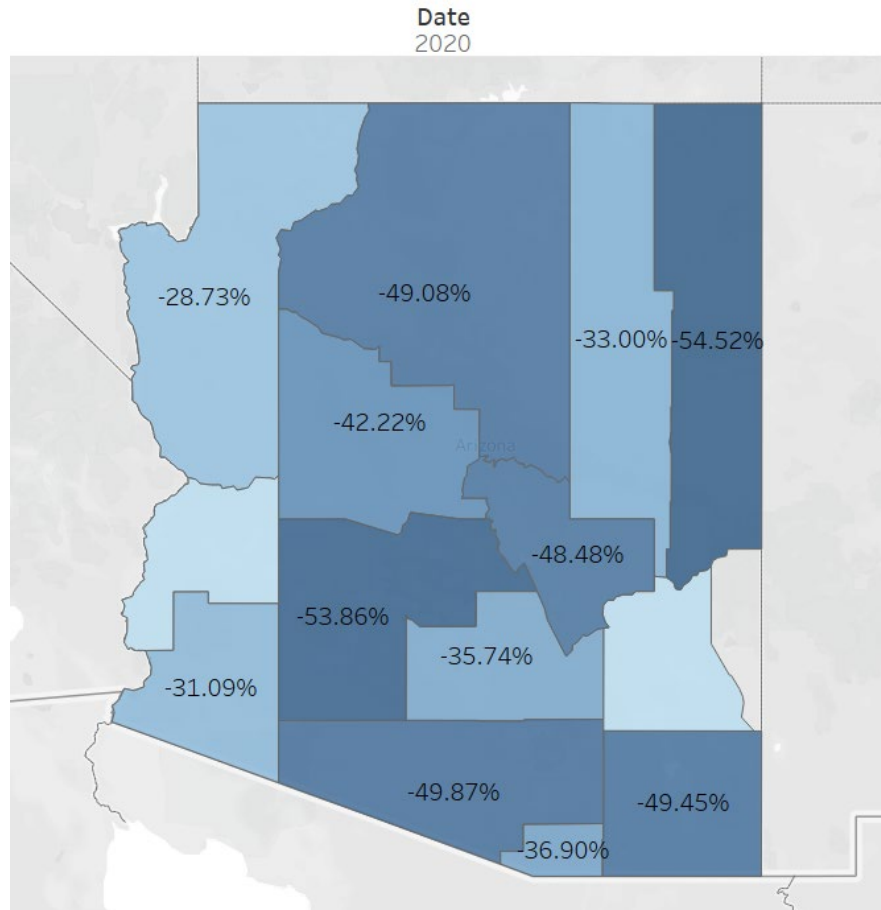
Source: Dean Runyan Associates

State Tax Revenue from Travel Spending



Source: Dean Runyan Associates

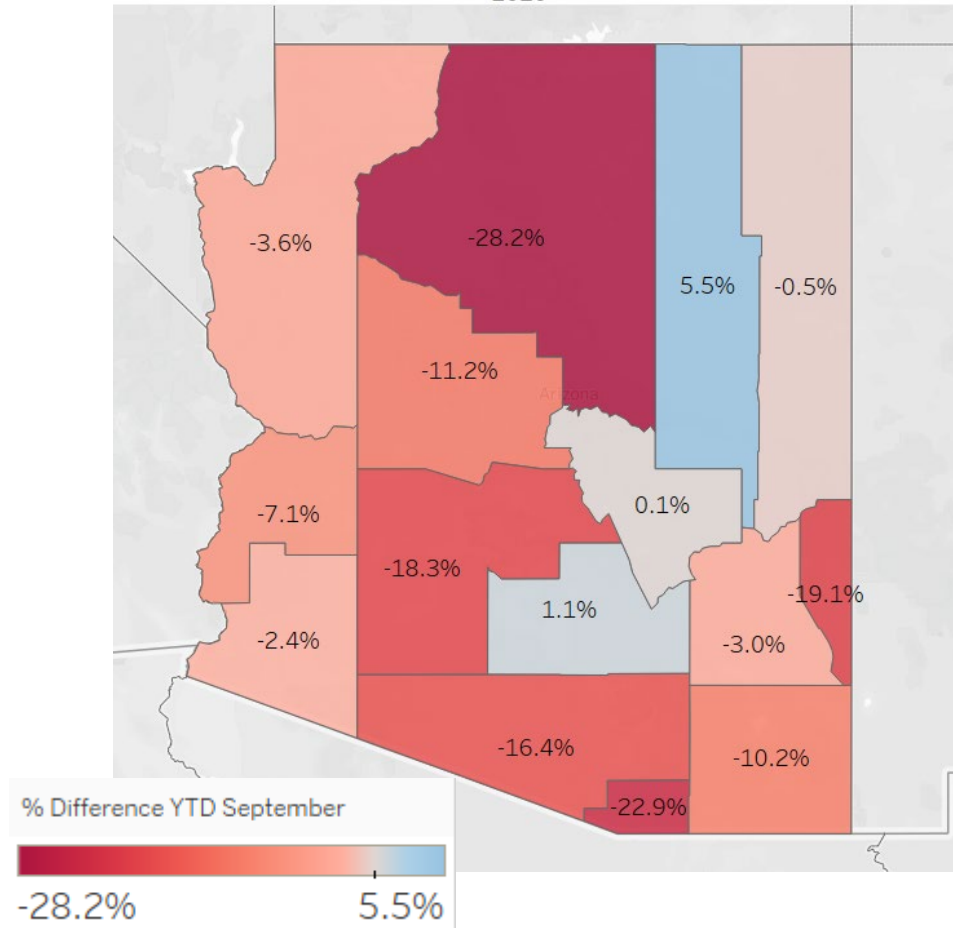
Gross Sales by Sector - Amusement



County	2019	2020	YTD % Change
Apache	\$541,747	\$246,406	-55%
Cochise	\$5,239,363	\$2,648,663	-49%
Coconino	\$109,299,613	\$55,653,711	-49%
Gila	\$2,020,758	\$1,041,037	-48%
Graham/Greenlee/La Paz	\$1,422,460	\$1,113,735	-22%
Maricopa	\$869,181,473	\$401,015,394	-54%
Mohave	\$14,148,523	\$10,083,693	-29%
Navajo	\$6,381,092	\$4,275,428	-33%
Pima	\$91,182,592	\$45,710,688	-50%
Pinal	\$35,671,135	\$22,922,184	-36%
Santa Cruz	\$3,391,190	\$2,139,711	-37%
Yavapai	\$31,695,320	\$18,312,998	-42%
Yuma	\$11,314,281	\$7,796,233	-31%

Gross Sales by Sector – Restaurant/Bar

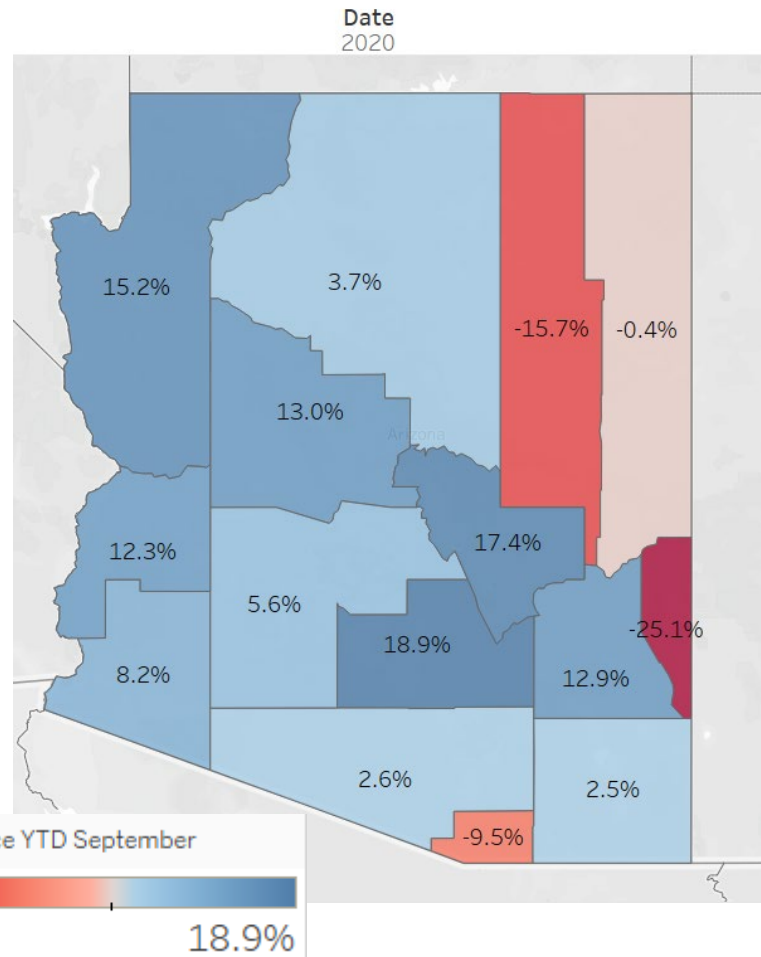
Date
2020



County	2019	2020	YTD % Change
Apache	\$12,257,496	\$12,193,624	-1%
Cochise	\$123,592,624	\$111,034,793	-10%
Coconino	\$438,402,048	\$314,980,217	-28%
Gila	\$66,409,099	\$66,483,067	0%
Graham	\$31,834,171	\$30,871,394	-3%
Greenlee	\$5,546,027	\$4,486,964	-19%
La Paz	\$30,400,510	\$28,229,165	-7%
Maricopa	\$8,273,209,427	\$6,760,203,157	-18%
Mohave	\$269,987,500	\$260,147,720	-4%
Navajo	\$101,983,162	\$107,581,504	5%
Pima	\$1,551,568,769	\$1,296,392,007	-16%
Pinal	\$292,483,052	\$295,650,756	1%
Santa Cruz	\$47,357,176	\$36,511,346	-23%
Yavapai	\$329,084,410	\$292,250,695	-11%
Yuma	\$235,376,410	\$229,636,766	-2%

Source: AZ Dept. of Revenue, NAU AHRRC

Gross Sales by Sector – Retail

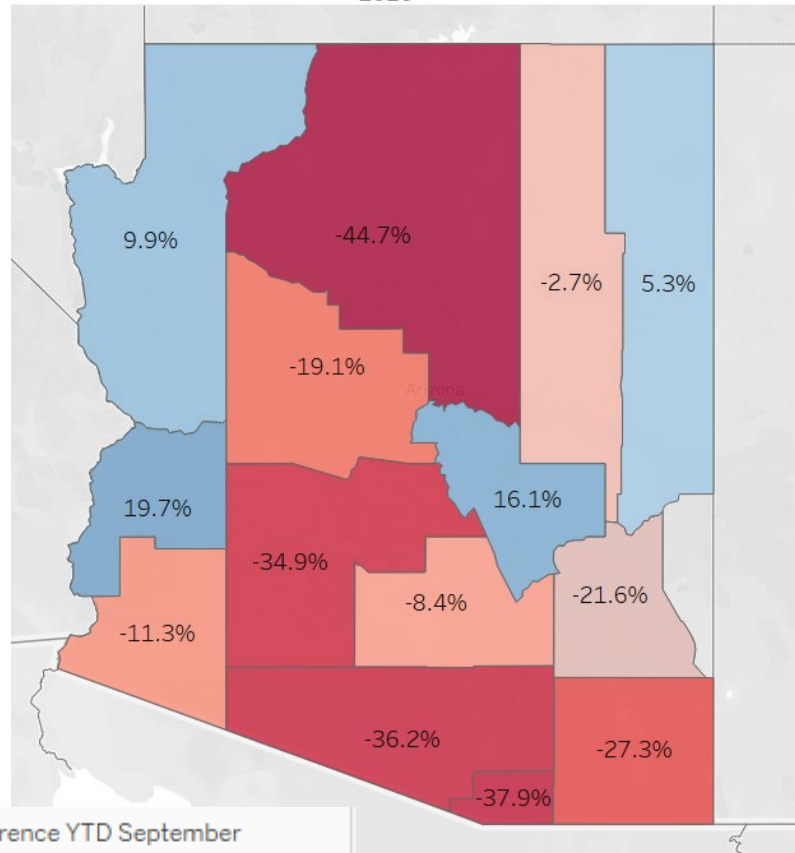


County	2019	2020	YTD % Change
Apache	\$113,180,531	\$112,671,916	0%
Cochise	\$707,118,628	\$724,644,732	2%
Coconino	\$1,038,732,746	\$1,076,999,708	4%
Gila	\$255,380,052	\$299,714,750	17%
Graham	\$214,409,990	\$242,019,337	13%
Greenlee	\$129,854,603	\$97,263,408	-25%
La Paz	\$119,356,309	\$134,030,129	12%
Maricopa	\$37,560,453,451	\$39,660,668,795	6%
Mohave	\$1,464,243,307	\$1,686,575,551	15%
Navajo	\$814,479,339	\$686,512,312	-16%
Pima	\$7,159,096,035	\$7,346,363,798	3%
Pinal	\$1,237,855,344	\$1,471,765,173	19%
Santa Cruz	\$248,411,070	\$224,819,050	-9%
Yavapai	\$1,532,039,118	\$1,731,801,314	13%
Yuma	\$1,236,513,384	\$1,337,689,095	8%

Source: AZ Dept. of Revenue, NAU AHRRC

Gross Sales by Sector – Hotel

Date
2020



% Difference YTD September

-44.7%

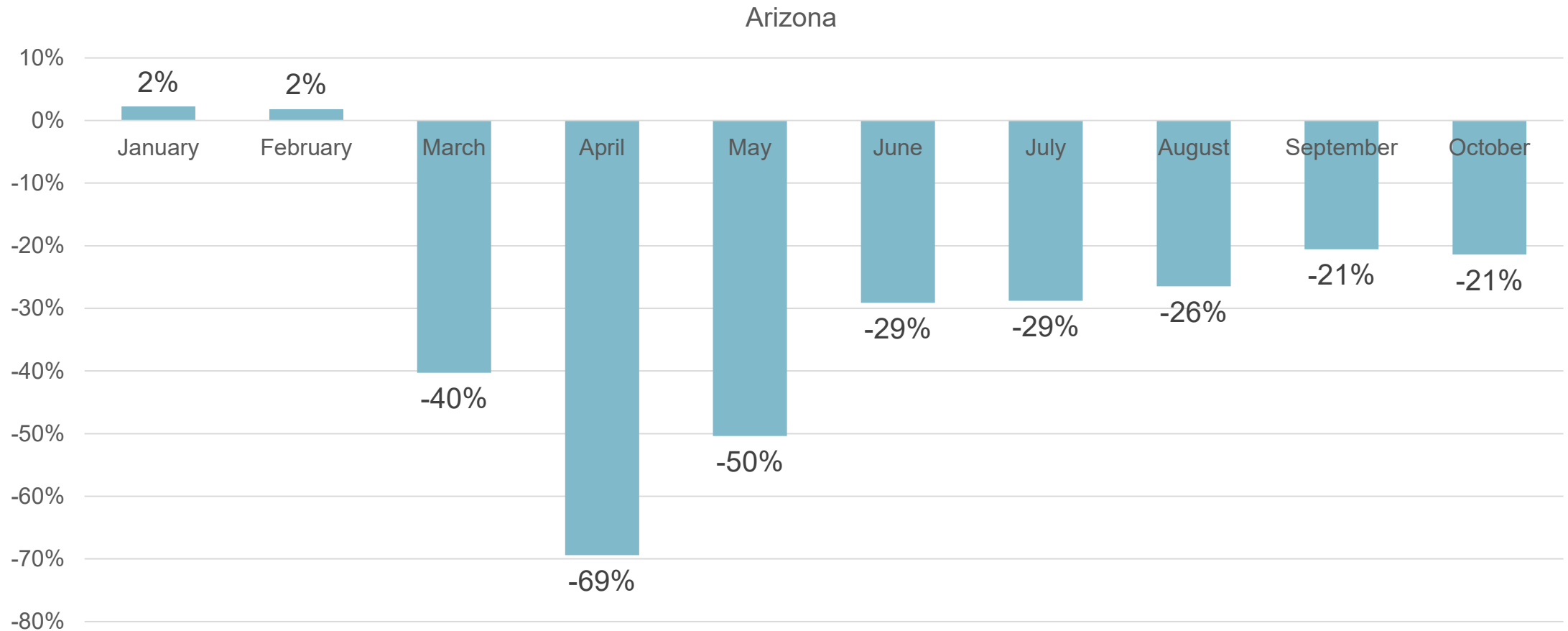
19.7%

County	2019	2020	YTD % Change
Apache	\$8,109,008	\$8,537,101	5%
Cochise	\$32,230,137	\$23,434,592	-27%
Coconino	\$402,875,615	\$222,959,494	-45%
Gila	\$16,721,099	\$19,409,302	16%
Graham/Greenlee	\$9,143,827	\$7,171,516	-22%
La Paz	\$9,497,882	\$11,364,493	20%
Maricopa	\$1,732,543,231	\$1,127,734,036	-35%
Mohave	\$65,213,720	\$71,699,897	10%
Navajo	\$40,965,262	\$39,864,195	-3%
Pima	\$332,696,494	\$212,163,406	-36%
Pinal	\$25,658,341	\$23,501,668	-8%
Santa Cruz	\$11,047,444	\$6,858,890	-38%
Yavapai	\$175,072,605	\$141,632,702	-19%
Yuma	\$46,866,248	\$41,562,976	-11%

Source: AZ Dept. of Revenue, NAU AHRRC

Hotel Room Demand

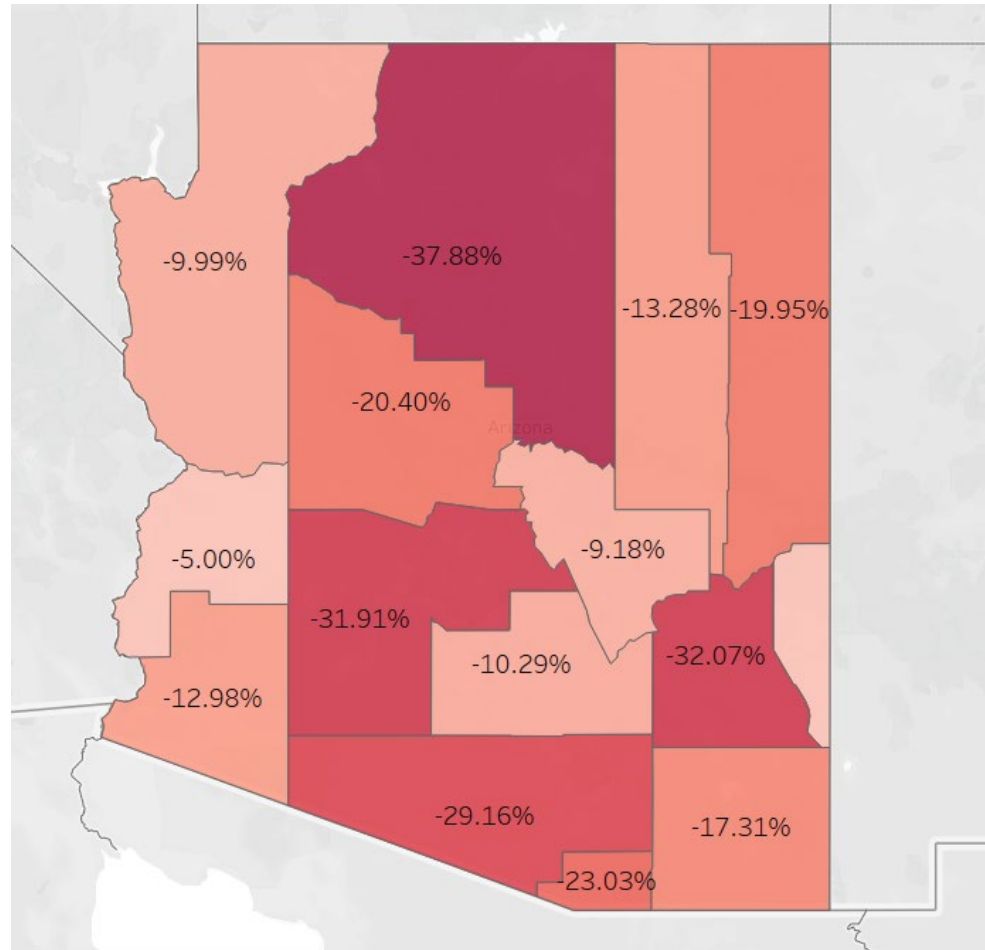
2020 YOY % Change



Source: STR. Republication or other reuse of this data without the express written consent of STR is strictly prohibited.

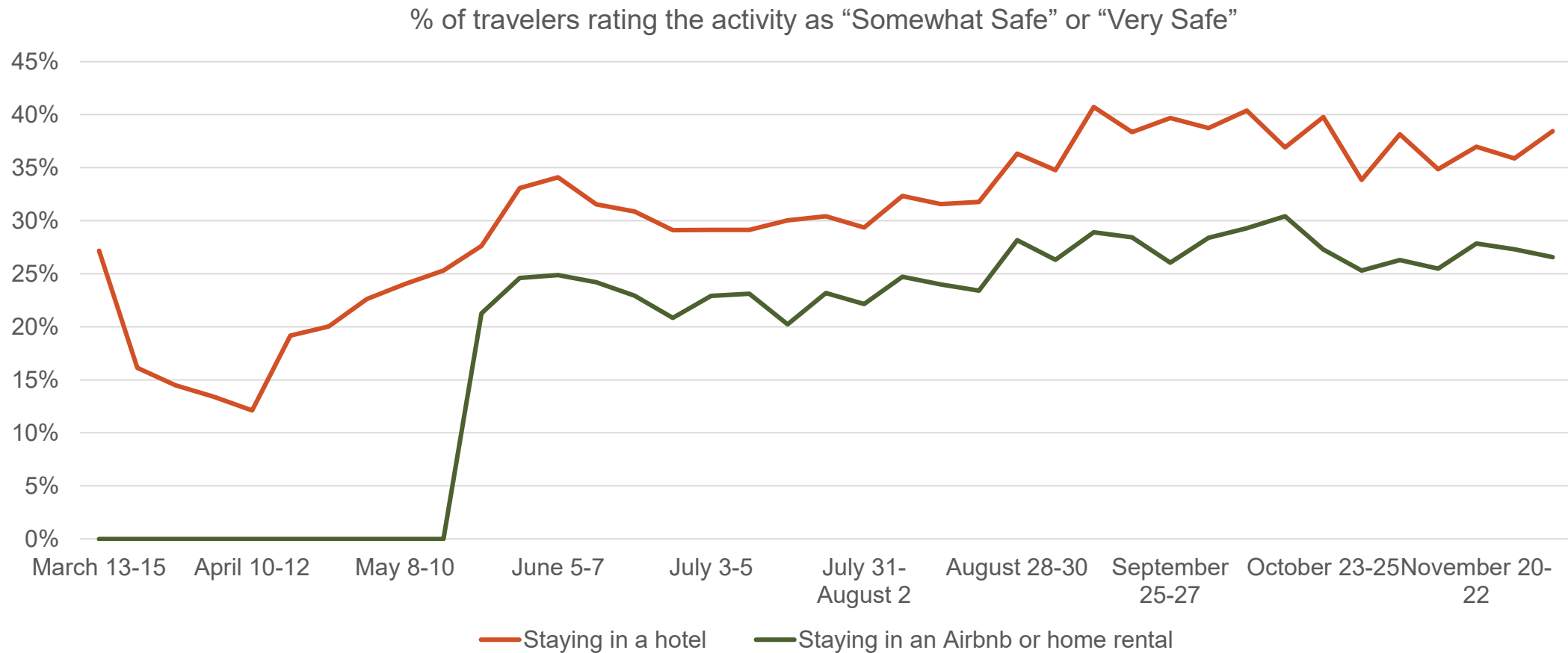
Hotel Room Demand

YTD October % Change



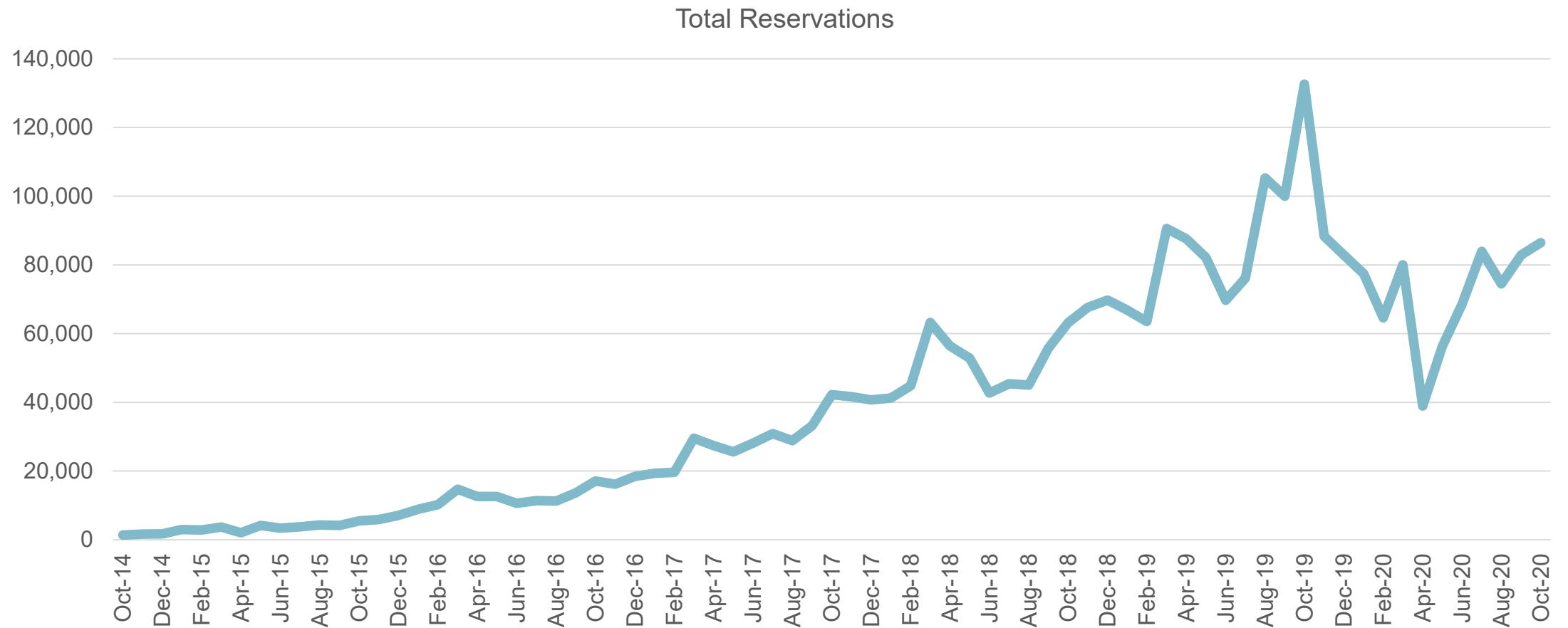
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Perceived Safety of Travel Activities



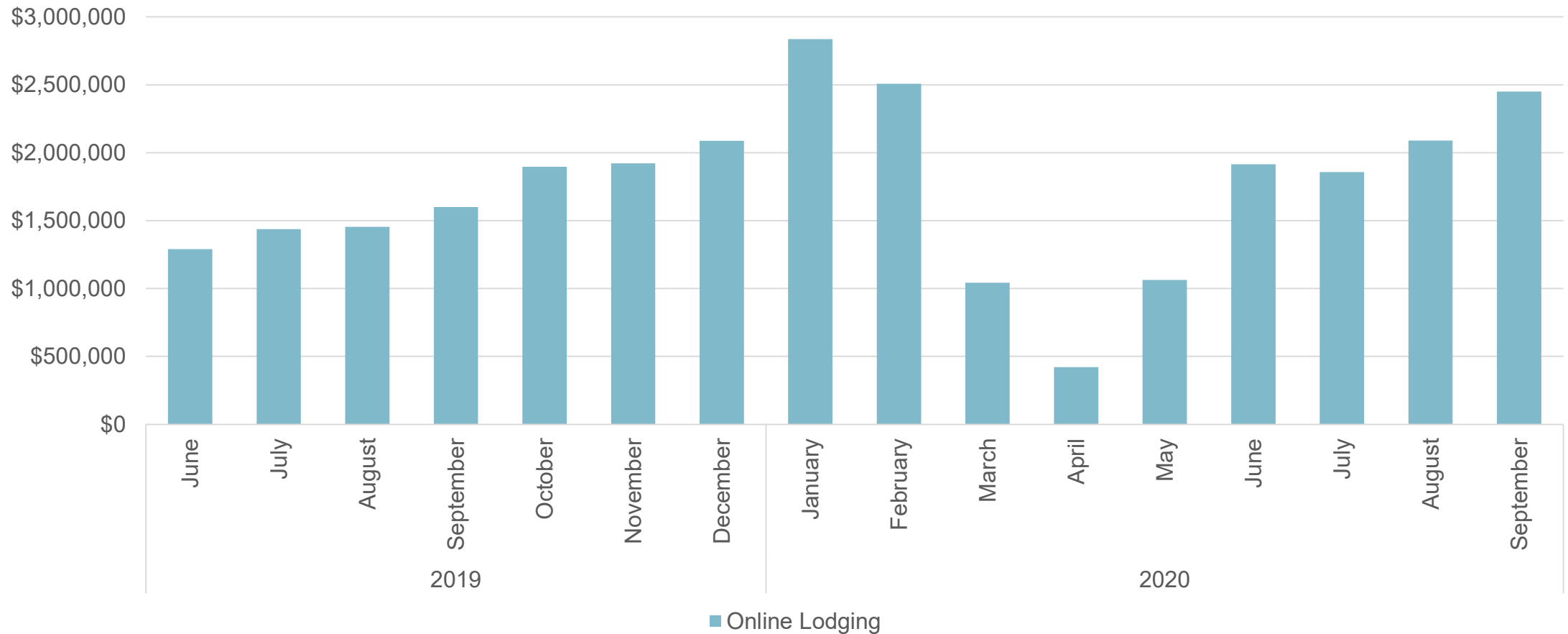
Source: Destination Analysts

Airbnb Reservations



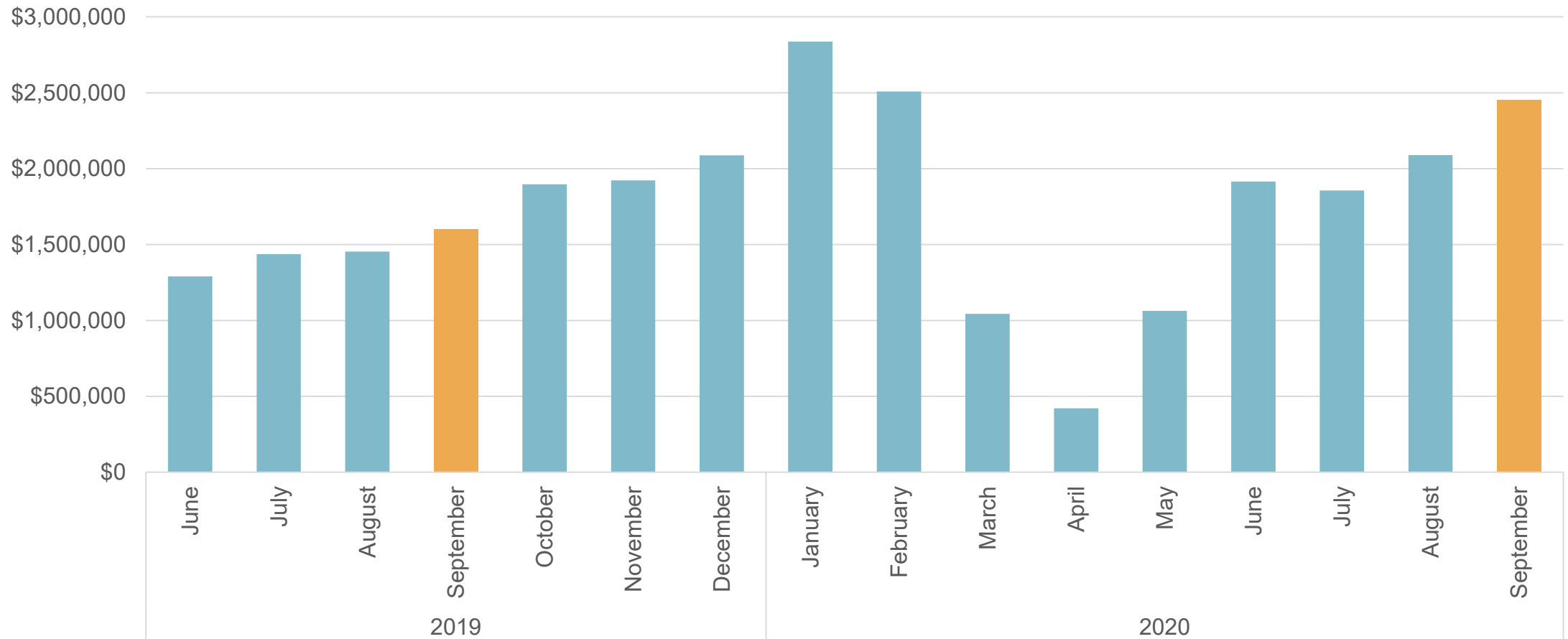
Source: AirDNA

Online Lodging Tax Collections



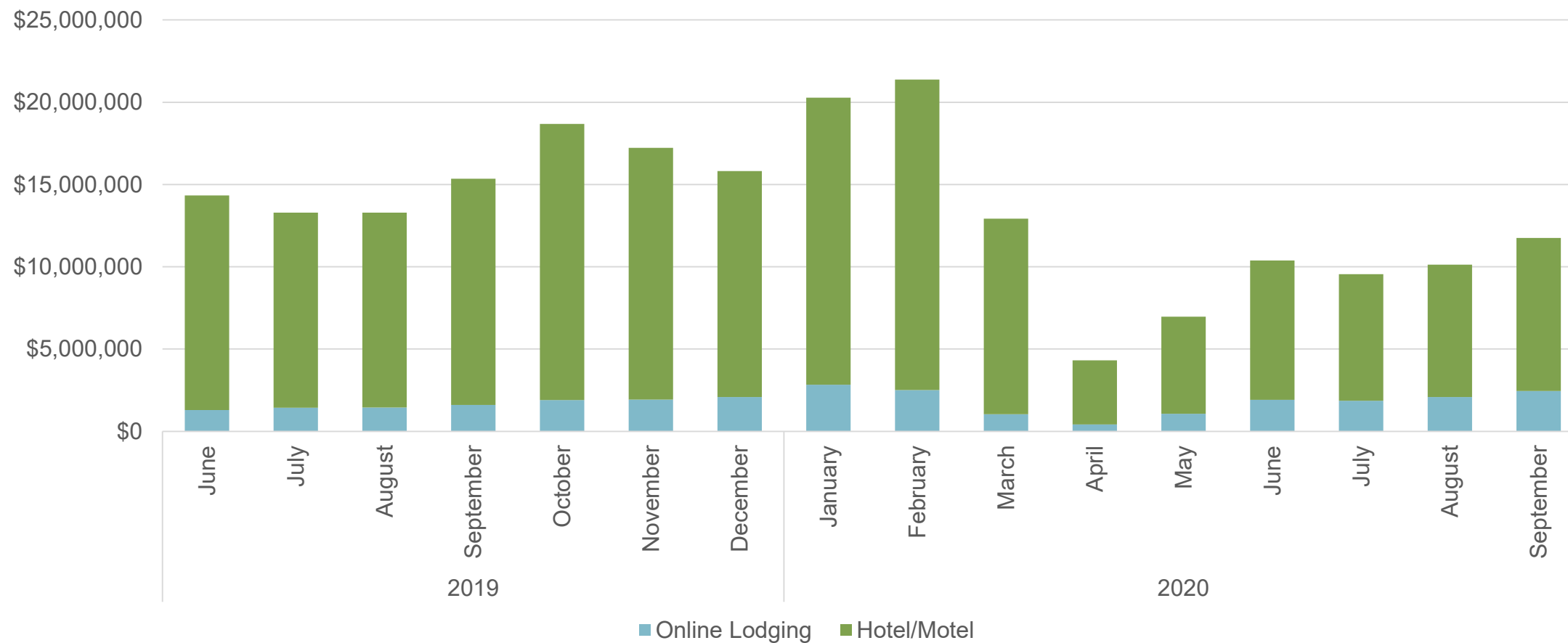
Source: AZ Dept. of Revenue, NAU AHRRC

Online Lodging Tax Collections



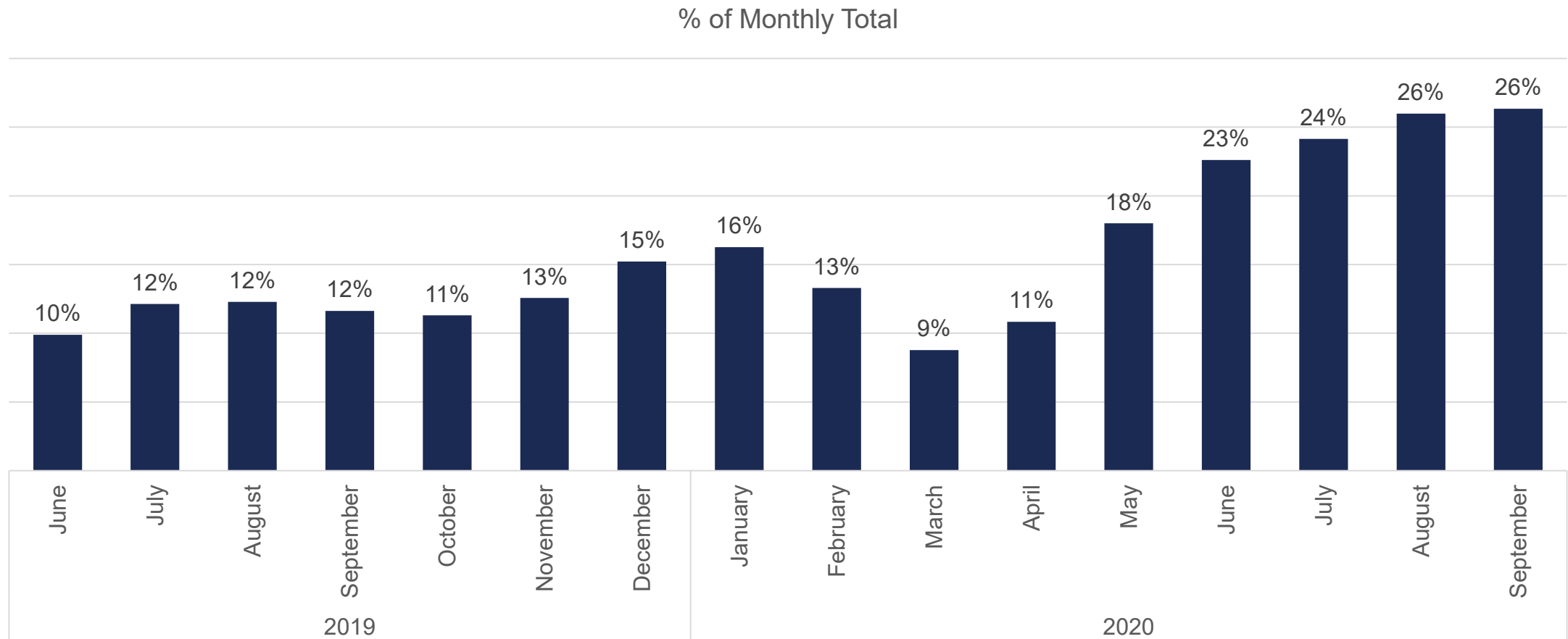
Source: AZ Dept. of Revenue, NAU AHRRC

Lodging Tax Collections



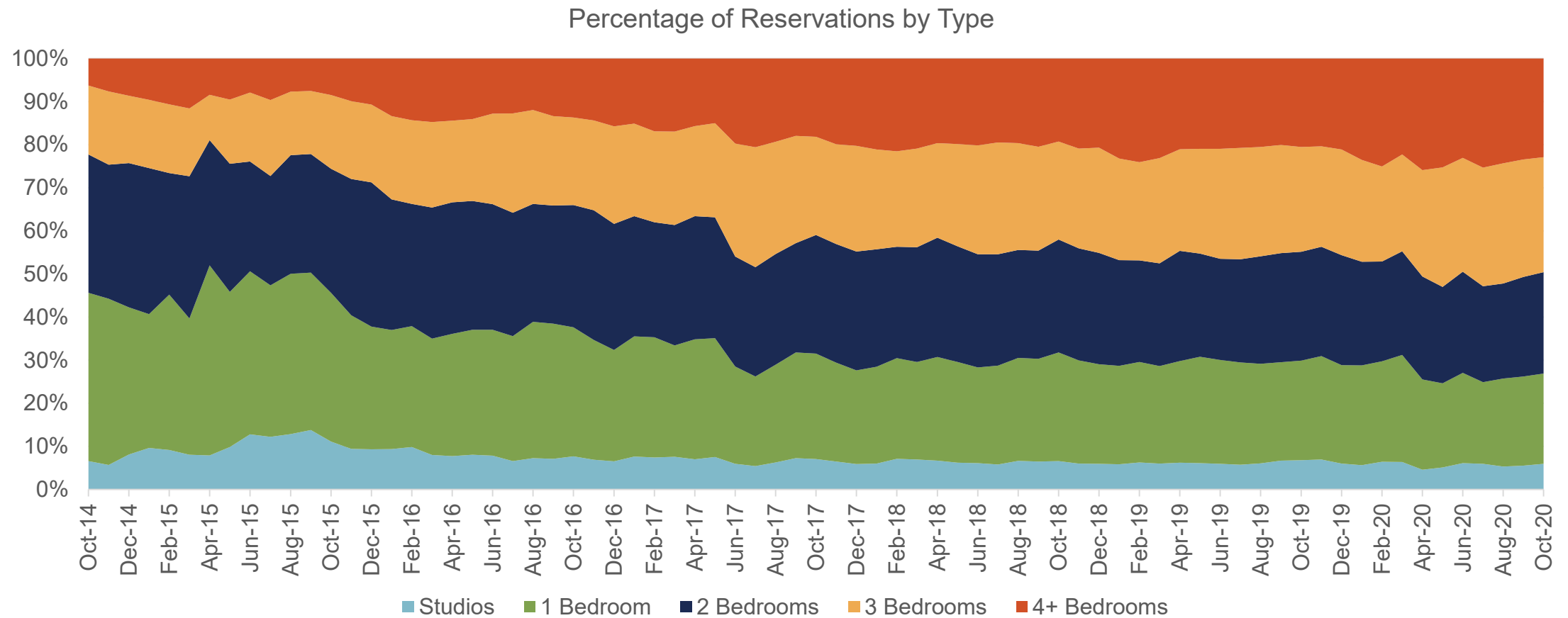
Source: AZ Dept. of Revenue, NAU

Lodging Tax Collections



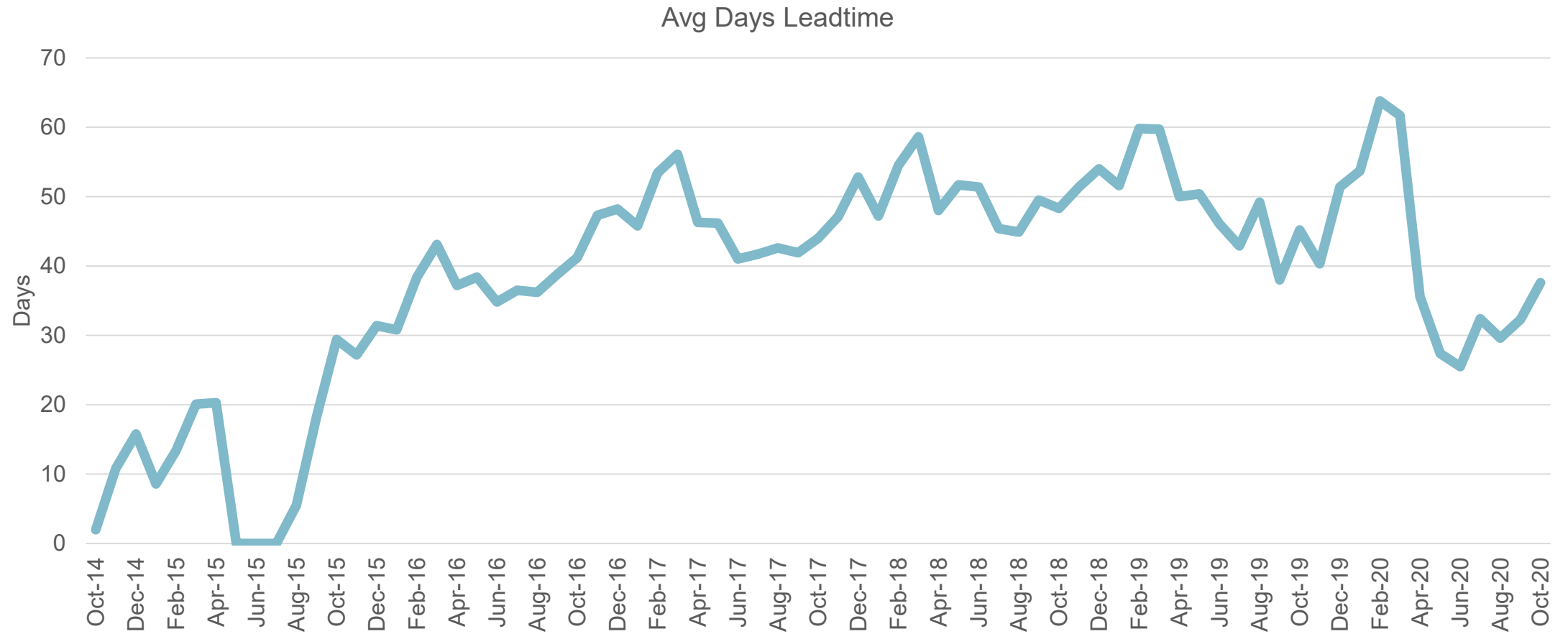
Source: AZ Dept. of Revenue, NAU

Airbnb Reservations



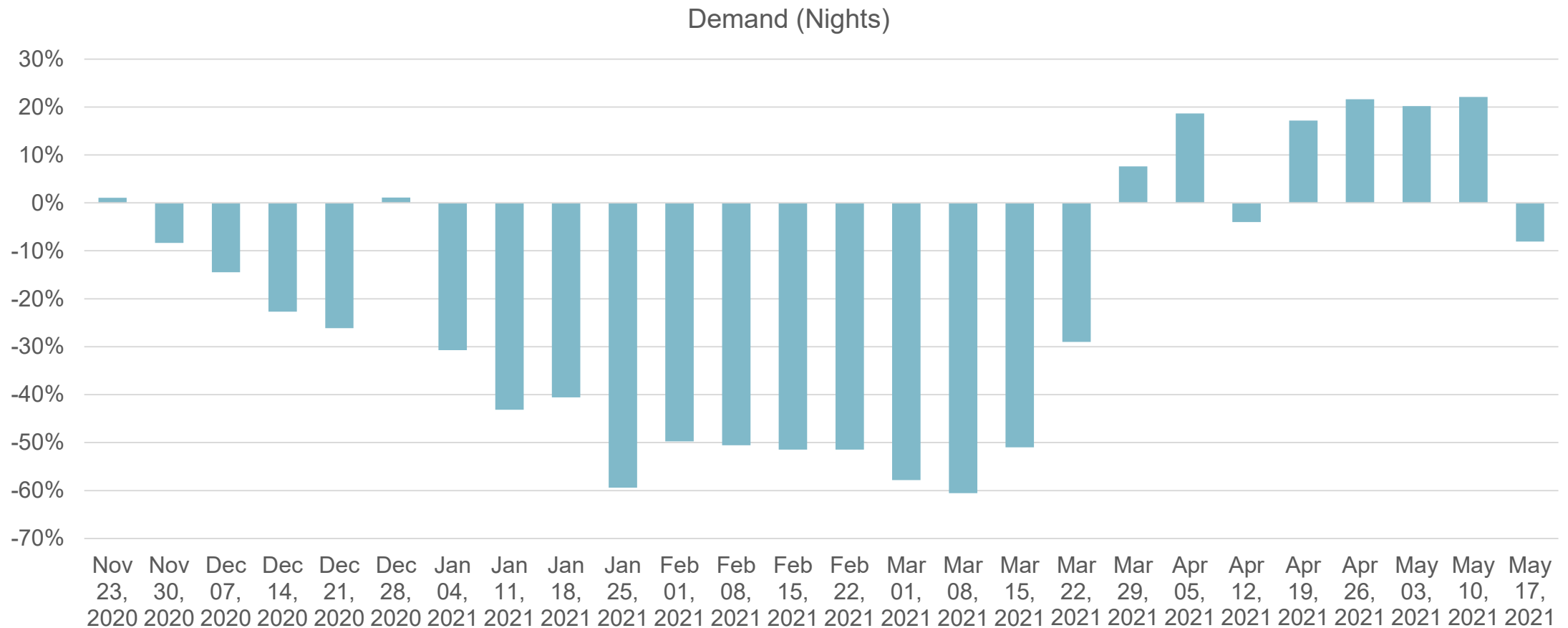
Source: AirDNA

Airbnb Reservations



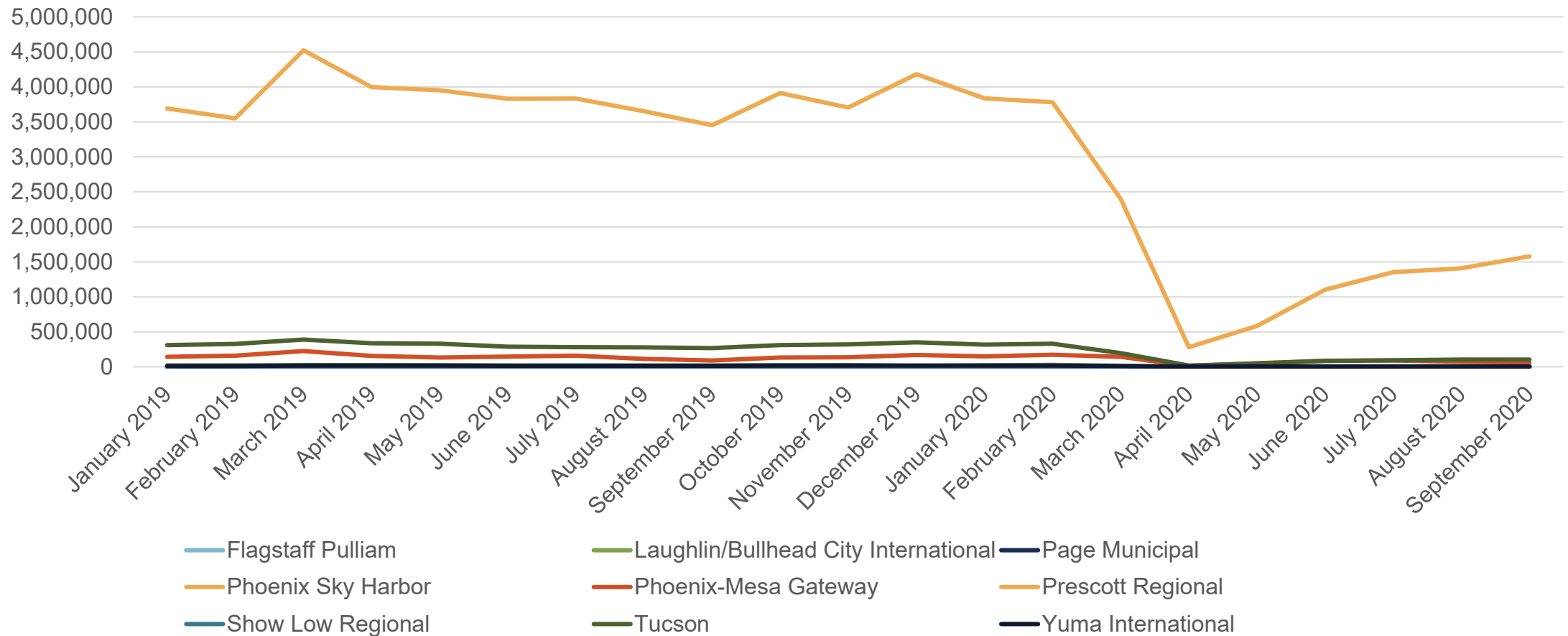
Source: AirDNA

Airbnb Demand – Forward Look



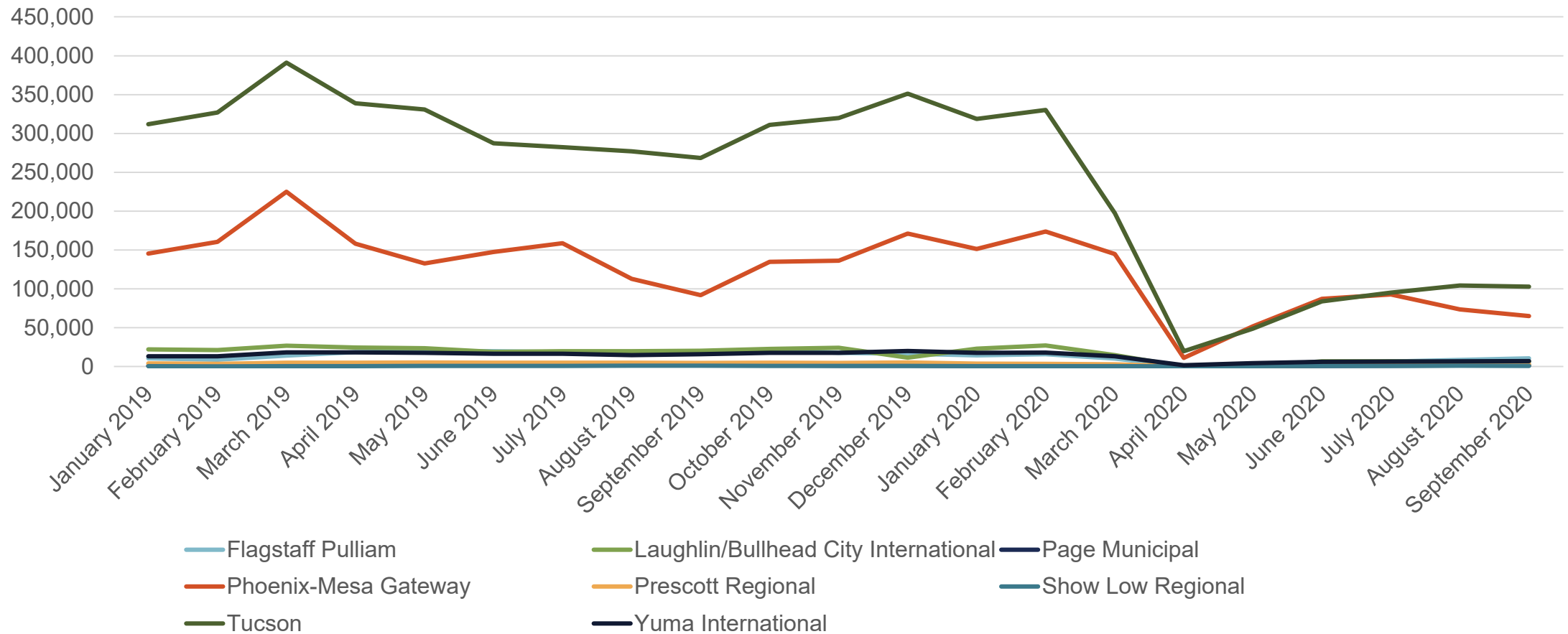
Source: AirDNA

Airport Passenger Volume



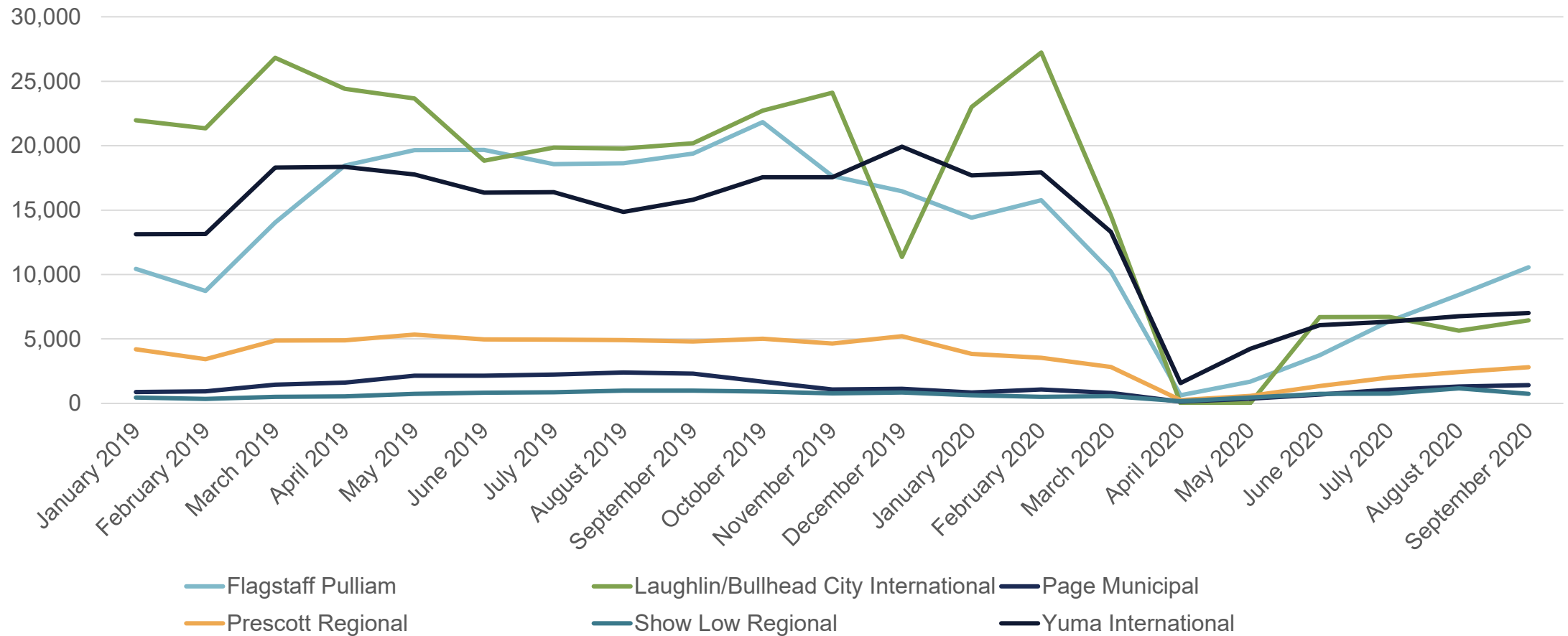
Source: NAU AHRRC

Airport Passenger Volume



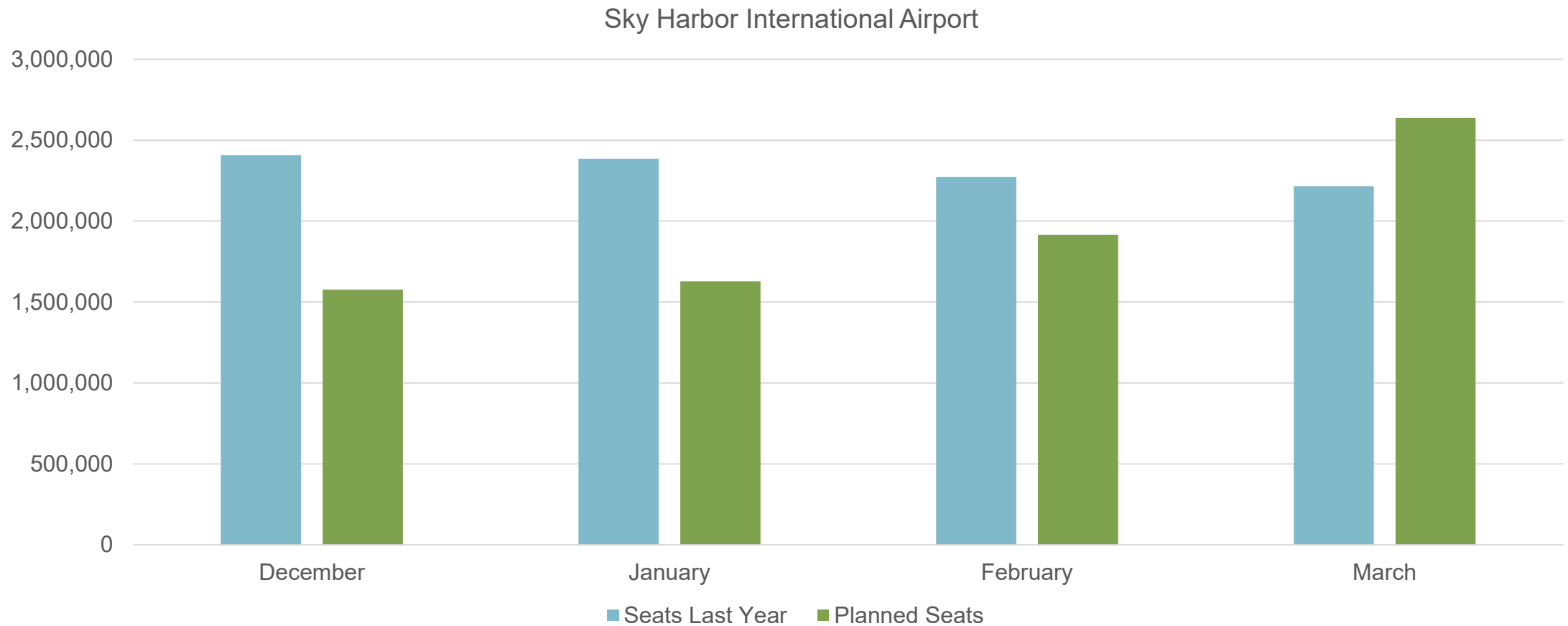
Source: NAU AHRRC

Airport Passenger Volume



Source: NAU AHRRC

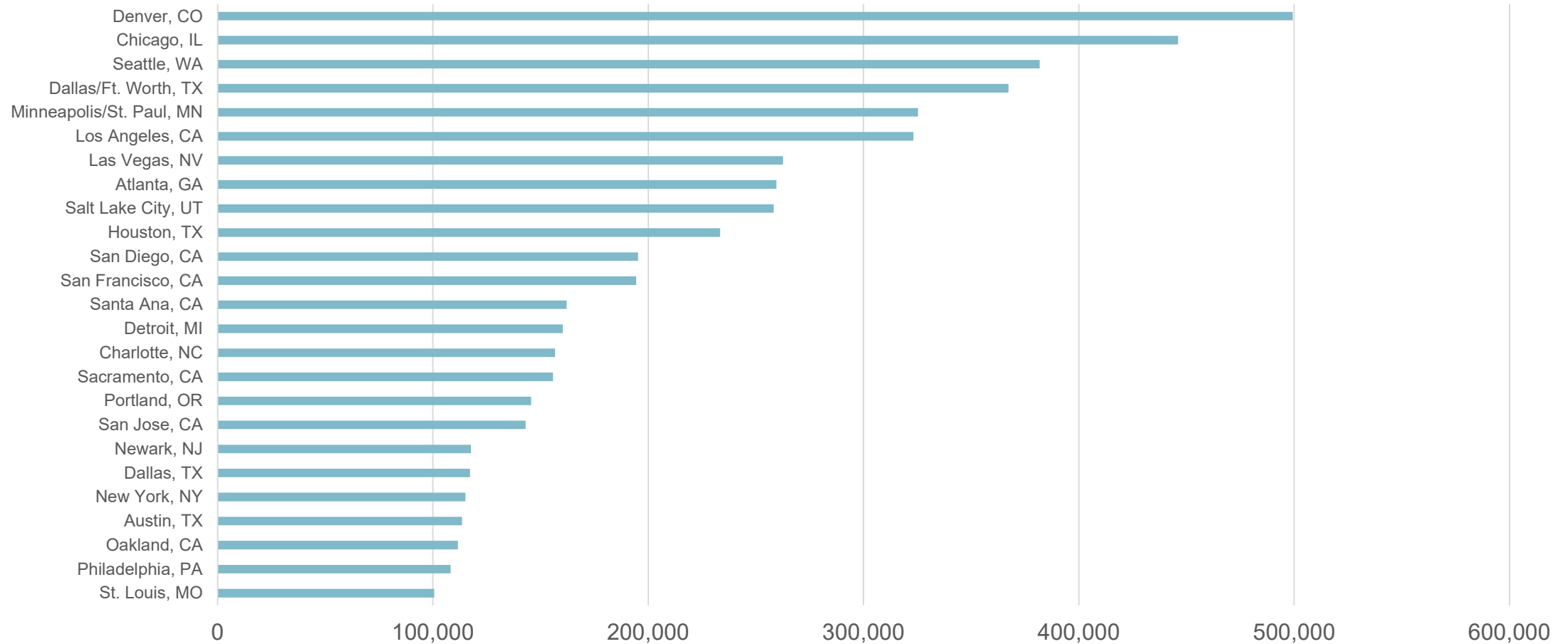
Airline Schedules



Source: Airline Data Inc. (Airline schedules retrieved 12/8/2020)

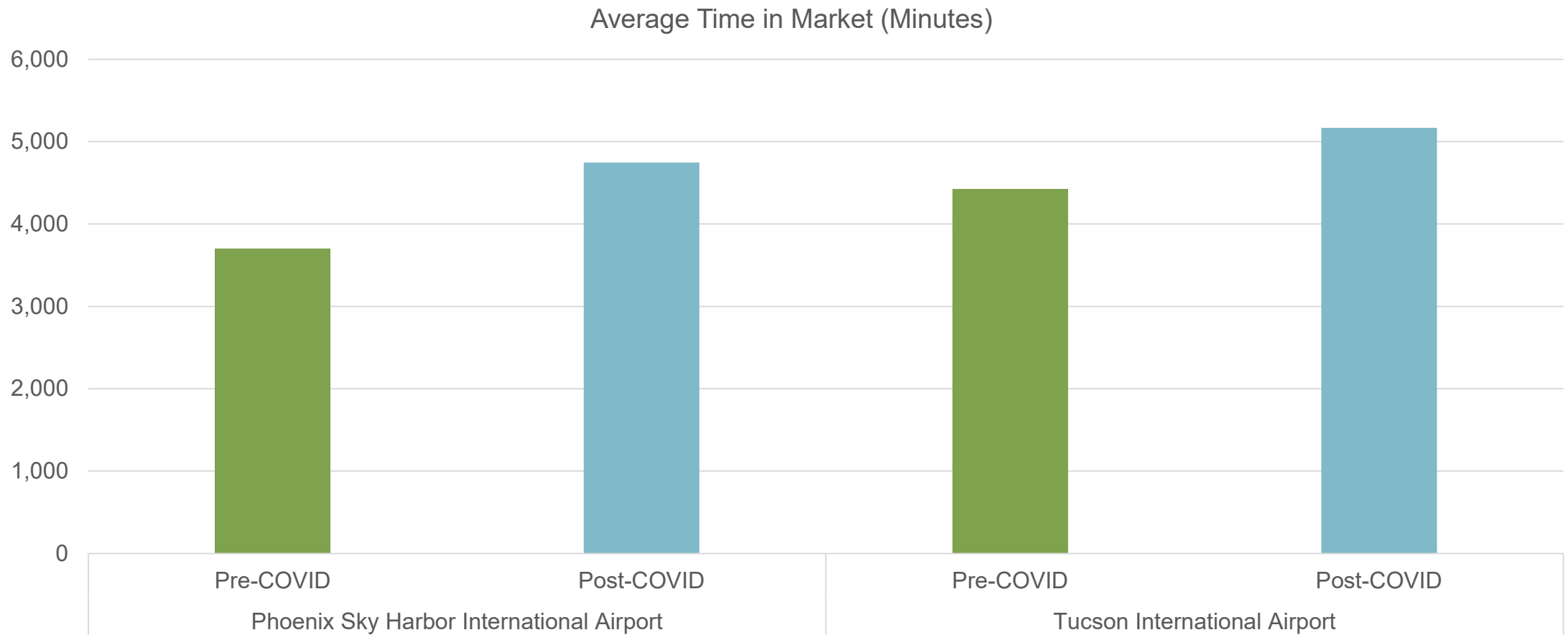
Airline Schedules

Seats Planned to All AZ Airports (December-March)



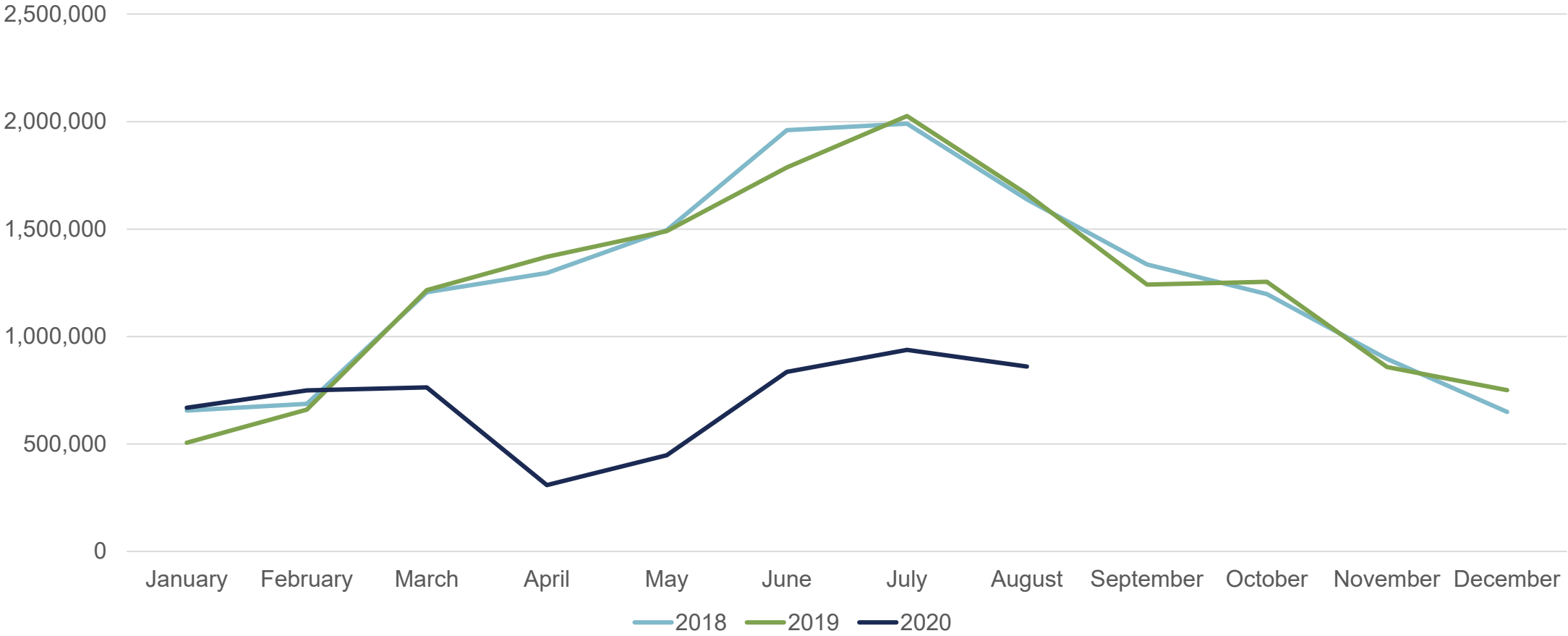
Source: Airline Data Inc. (Airline schedules retrieved 12/8/2020)

Air Traveler Length of Stay



Source: Arrivalist

National Parks Visitation



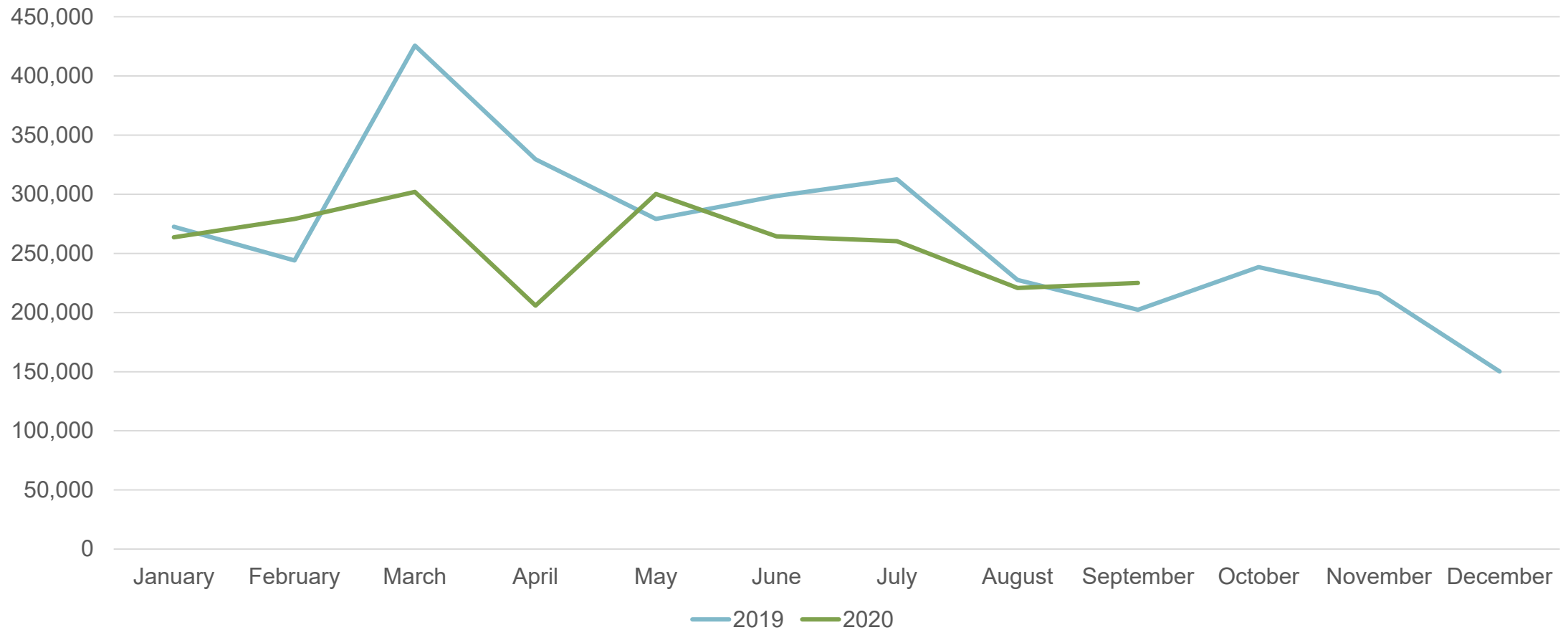
Source: NPS, NAU AHRRC

National Parks Visitation

National Park Service Visitation						
National Park	August 2020	August 2019	% Change	2020 YTD	2019 YTD	% Change YTD
Canyon de Chelly NM	0	51,391	-100.0%	75,537	288,021	-73.8%
Casa Grande NM	784	2,119	-63.0%	33,440	47,487	-29.6%
Chiricahua NM	2,551	2,532	0.8%	29,174	43,727	-33.3%
Coronado NM	17,208	12,838	34.0%	111,540	73,303	52.2%
Fort Bowie NHS	45	178	-74.7%	4,037	5,204	-22.4%
Glen Canyon NRA ¹	206,084	515,230	-60.0%	1,117,728	2,979,650	-62.5%
Grand Canyon NP	295,462	700,896	-57.8%	1,663,146	4,171,774	-60.1%
Hubbell Trading Post NHS	0	2,800	-100.0%	11,407	31,350	-63.6%
Lake Mead NRA ¹	199,743	156,581	27.6%	1,289,739	956,947	34.8%
Montezuma Castle NM	14,490	25,385	-42.9%	132,975	254,259	-47.7%
Navajo NM	0	5,939	-100.0%	3,985	35,031	-88.6%
Organ Pipe Cactus NM	10,969	14,918	-26.5%	133,967	189,549	-29.3%
Petrified Forest NP	41,460	62,276	-33.4%	240,074	469,512	-48.9%
Pipe Spring NM	2,669	3,163	-15.6%	6,906	20,207	-65.8%
Saguaro NP	24,301	51,309	-52.6%	484,626	727,597	-33.4%
Sunset Crater Volcano NM	4,161	10,855	-61.7%	19,698	79,763	-75.3%
Tonto NM	1,002	86	1065.1%	16,459	21,224	-22.5%
Tumacacori NHP	533	1,245	-57.2%	17,481	23,970	-27.1%
Tuzigoot NM	5,324	5,638	-5.6%	41,074	65,178	-37.0%
Walnut Canyon NM	10,585	13,506	-21.6%	55,469	106,584	-48.0%
Wupatki NM	22,804	24,528	-7.0%	84,255	129,932	-35.2%
Total All Parks	860,175	1,663,413	-48.3%	5,572,717	10,720,269	-48.0%

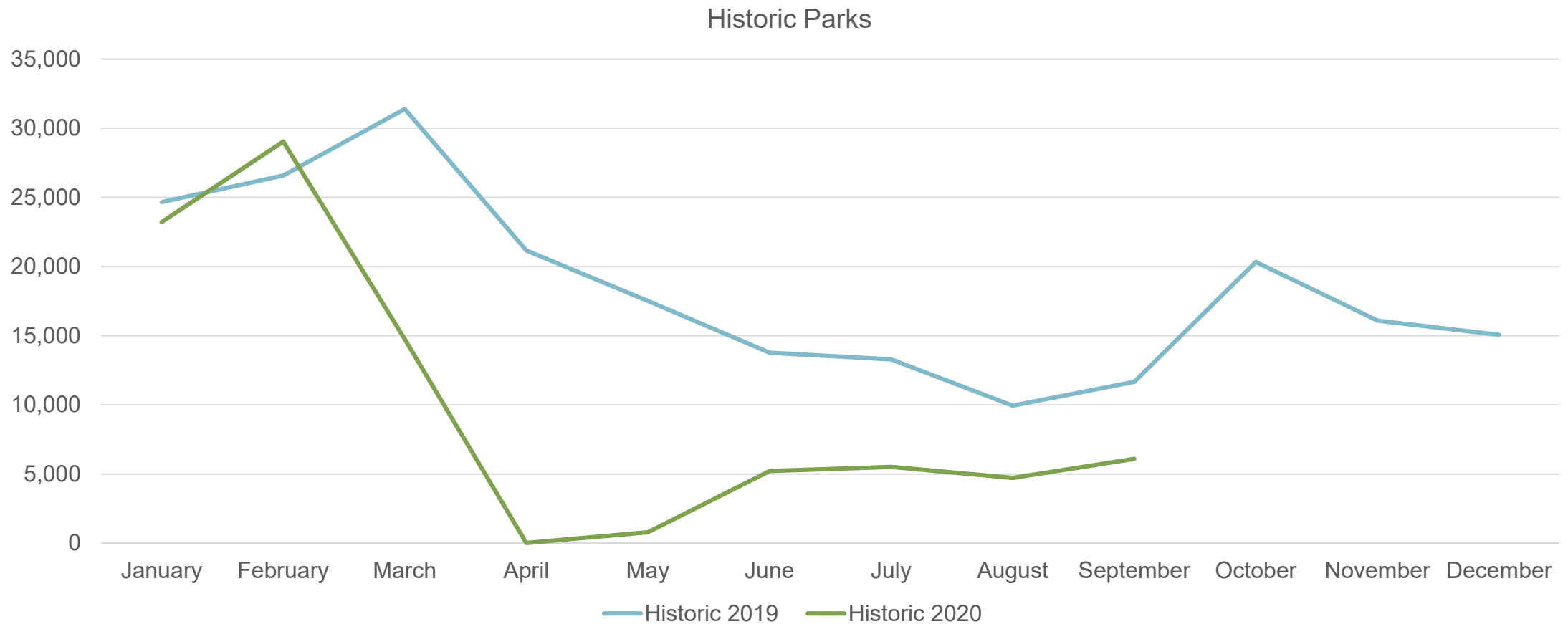
Source: NPS, NAU AHRRC

State Parks Visitation



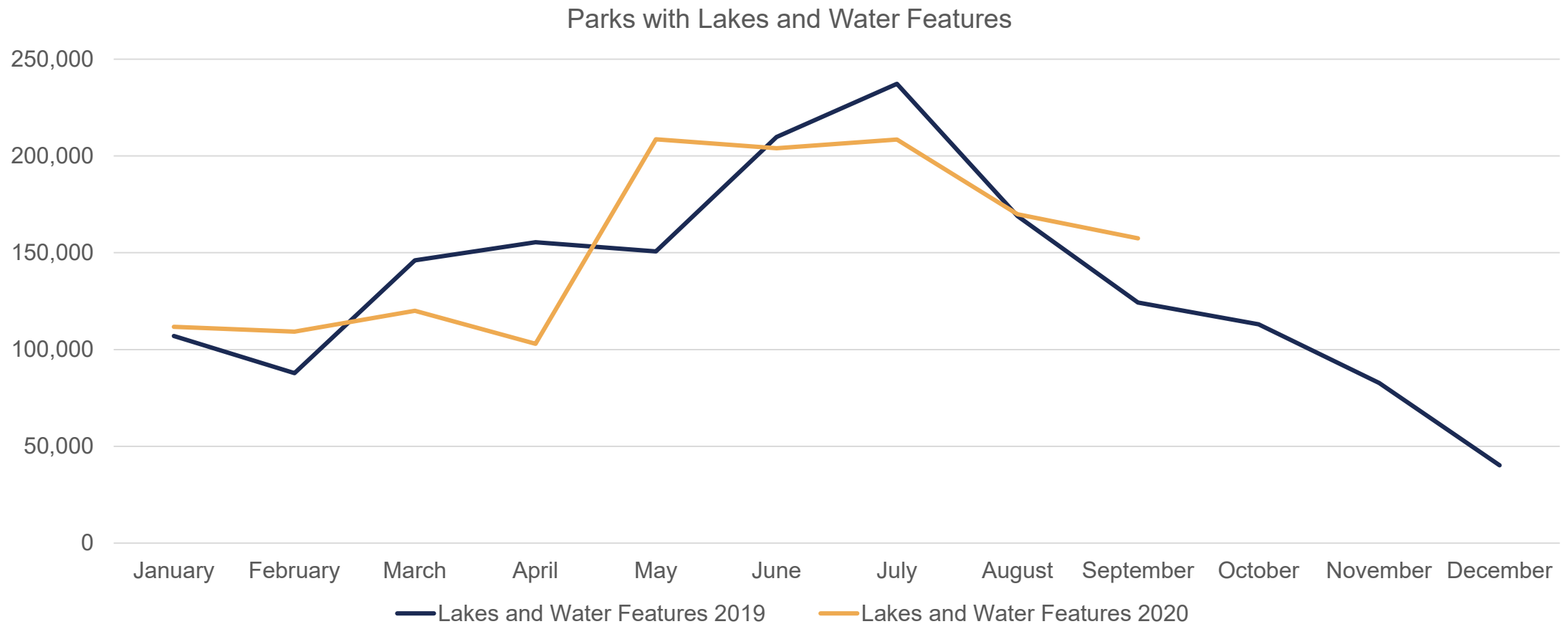
Source: NPS, NAU AHRRC

State Parks Visitation



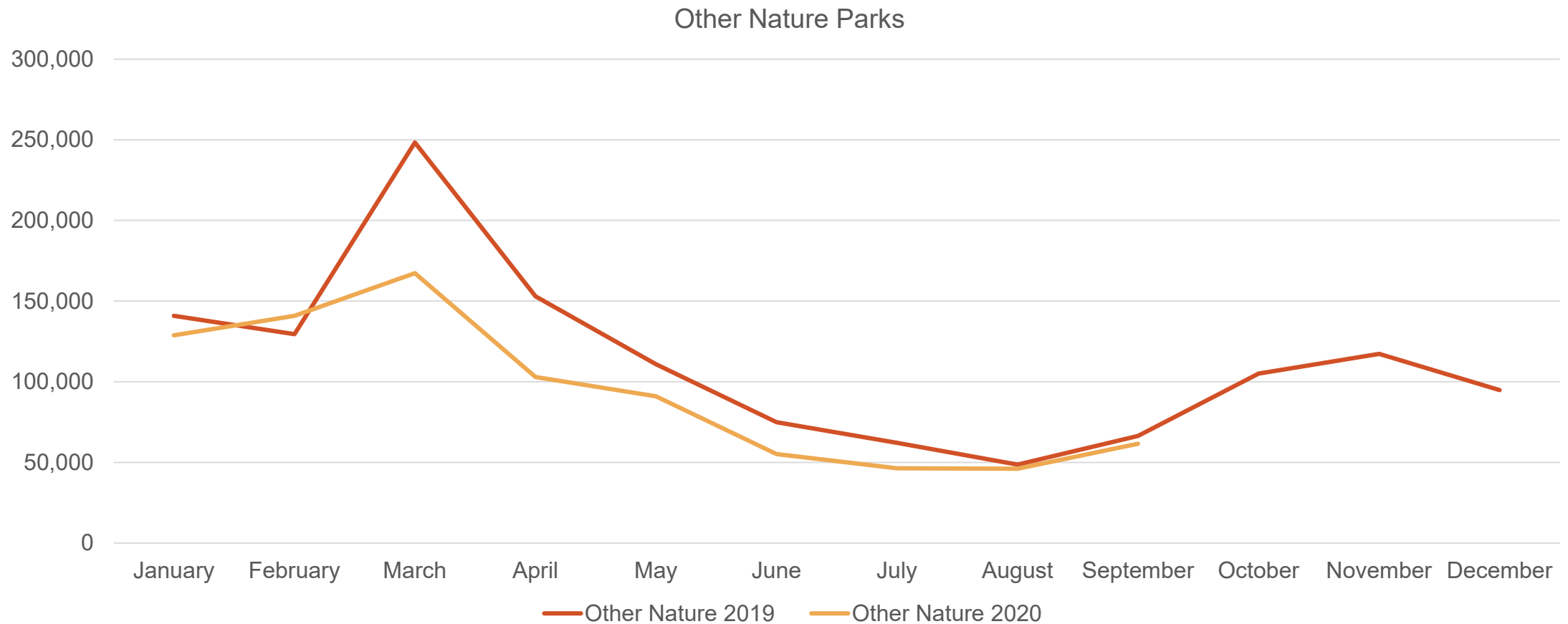
Source: NPS, NAU AHRRC

State Parks Visitation



Source: NPS, NAU AHRRC

State Parks Visitation



Source: NPS, NAU AHRRC

Visitor Profile

Sample Comparison

Year	Q1 Sample	Q2 Sample
2018	1300	1377
2019	1695	1133
2020	1808	1991

State of Origin

Rank	Q1	Q2
1	Arizona	Arizona
2	California	California
3	Illinois	Texas
4	Texas	New York
5	New York	Florida
6	Nevada	Illinois
7	Florida	Nevada
8	Washington	Washington
9	Colorado	Colorado
10	Michigan	Ohio

State of Origin – Arrivalist vs. Longwoods

Rank	Q1 Longwoods	Q1 Arrivalist
1	Arizona	Arizona
2	California	California
3	Illinois	Texas
4	Texas	New Mexico
5	New York	Nevada
6	Nevada	Colorado
7	Florida	Utah
8	Washington	Washington
9	Colorado	Illinois
10	Michigan	Minnesota

Source: Longwoods International, Arrivalist

State of Origin – Arrivalist vs. Longwoods

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8	Washington	Washington
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Source: Longwoods International, Arrivalist

State of Origin – Arrivalist vs. Longwoods

January, February, March

Rank	Q1 Longwoods	Q1 Arrivalist
1	Arizona	Arizona
2	California	California
3	Illinois	Texas
4	Texas	New Mexico
5	New York	Nevada
6	Nevada	Colorado
7	Florida	Utah
8	Washington	Washington
9	Colorado	Illinois
10	Michigan	Minnesota

Source: Longwoods International, Arrivalist

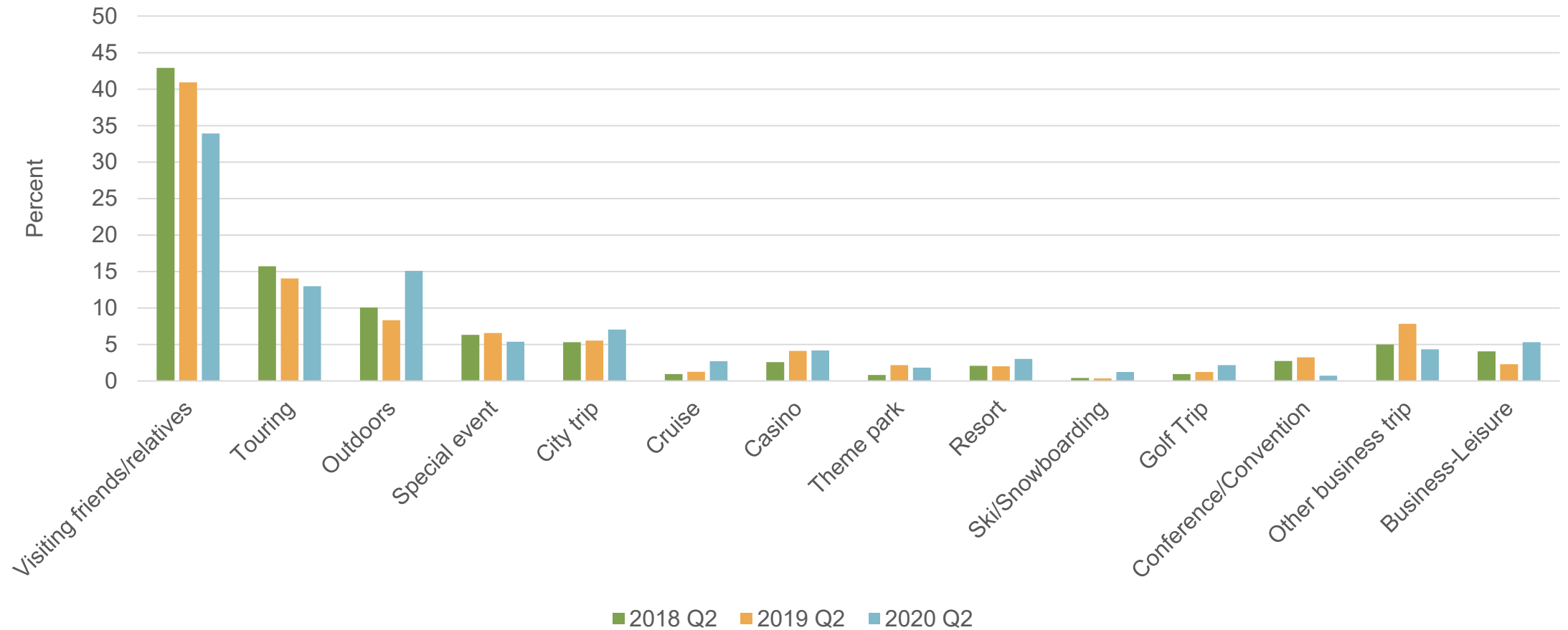
State of Origin – Arrivalist vs. Longwoods

April, May, June

Rank	Q2 Longwoods	Q2 Arrivalist
1	Arizona	Arizona
2	California	California
3	Texas	Nevada
4	New York	New Mexico
5	Florida	Texas
6	Illinois	Utah
7	Nevada	Colorado
8	Washington	Washington
9	Colorado	Illinois
10	Ohio	Missouri

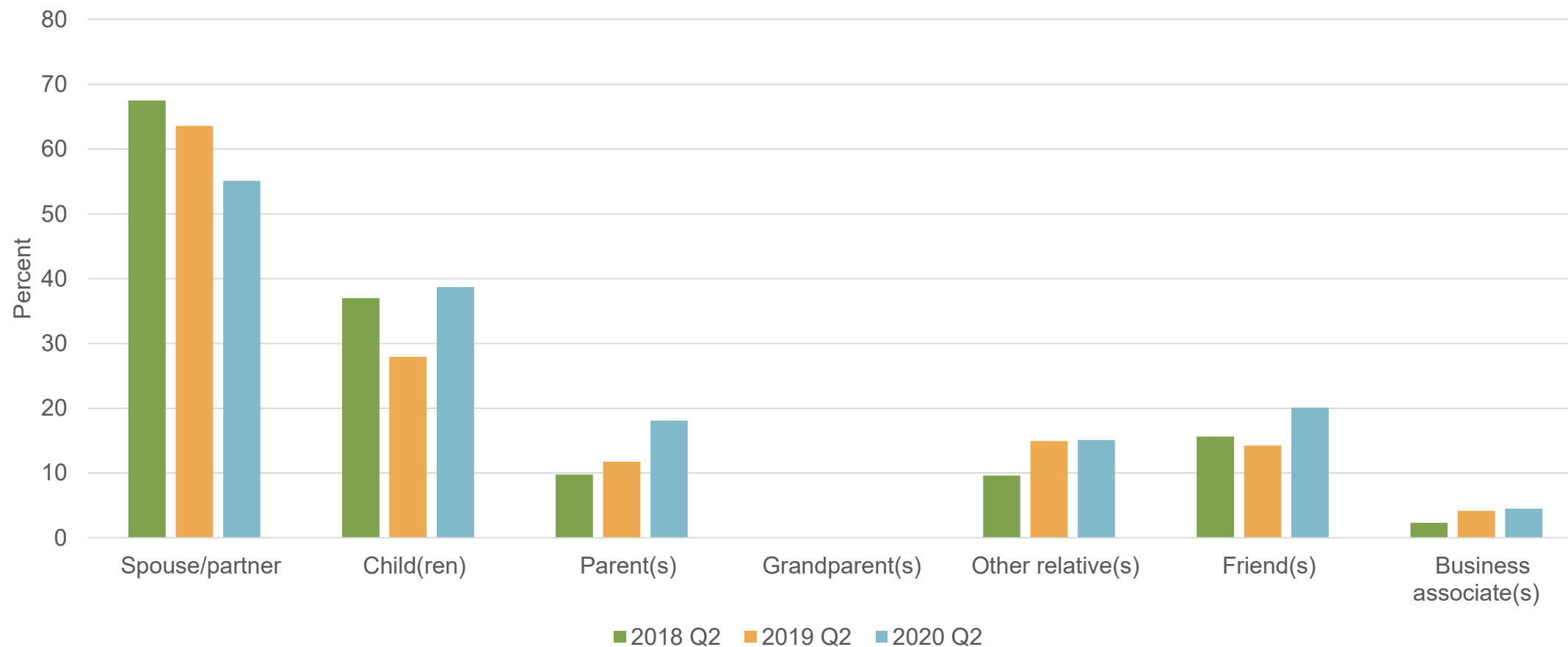
Source: Longwoods International, Arrivalist

Main Purpose of Trip



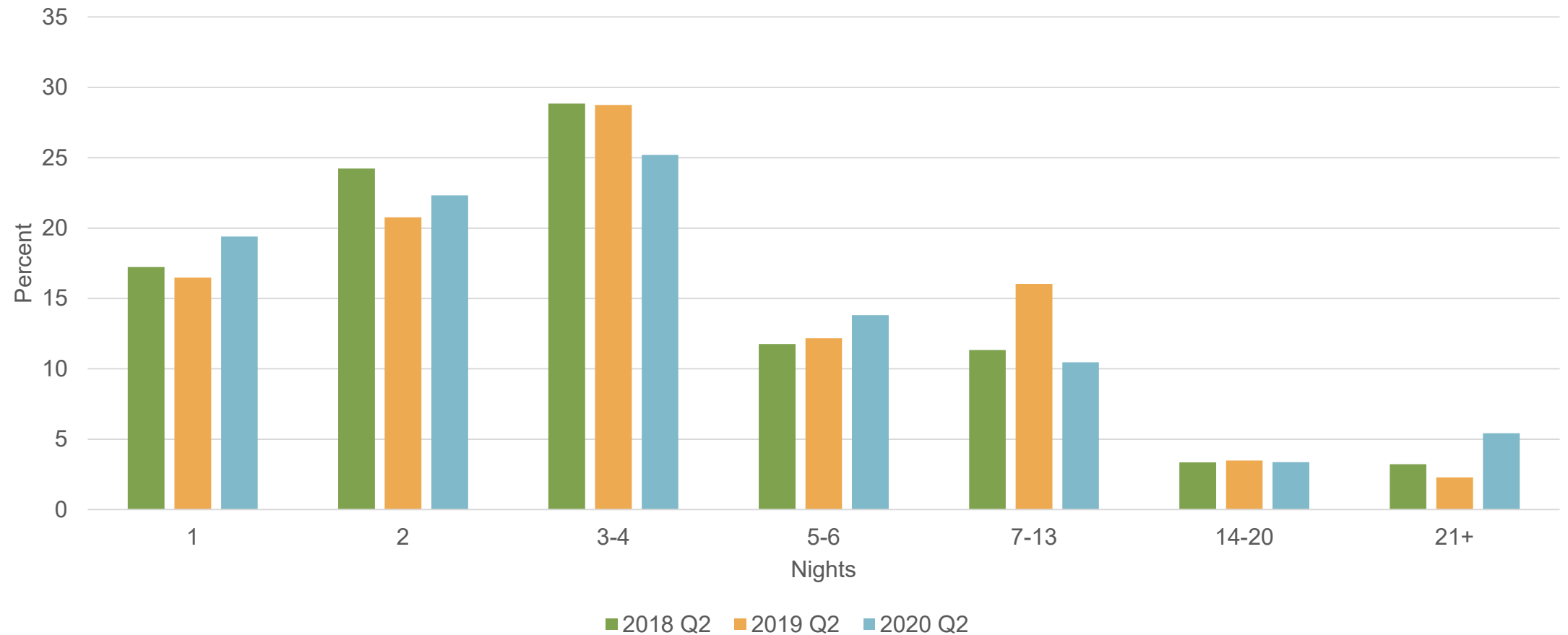
Source: Longwoods International

Immediate Travel Party



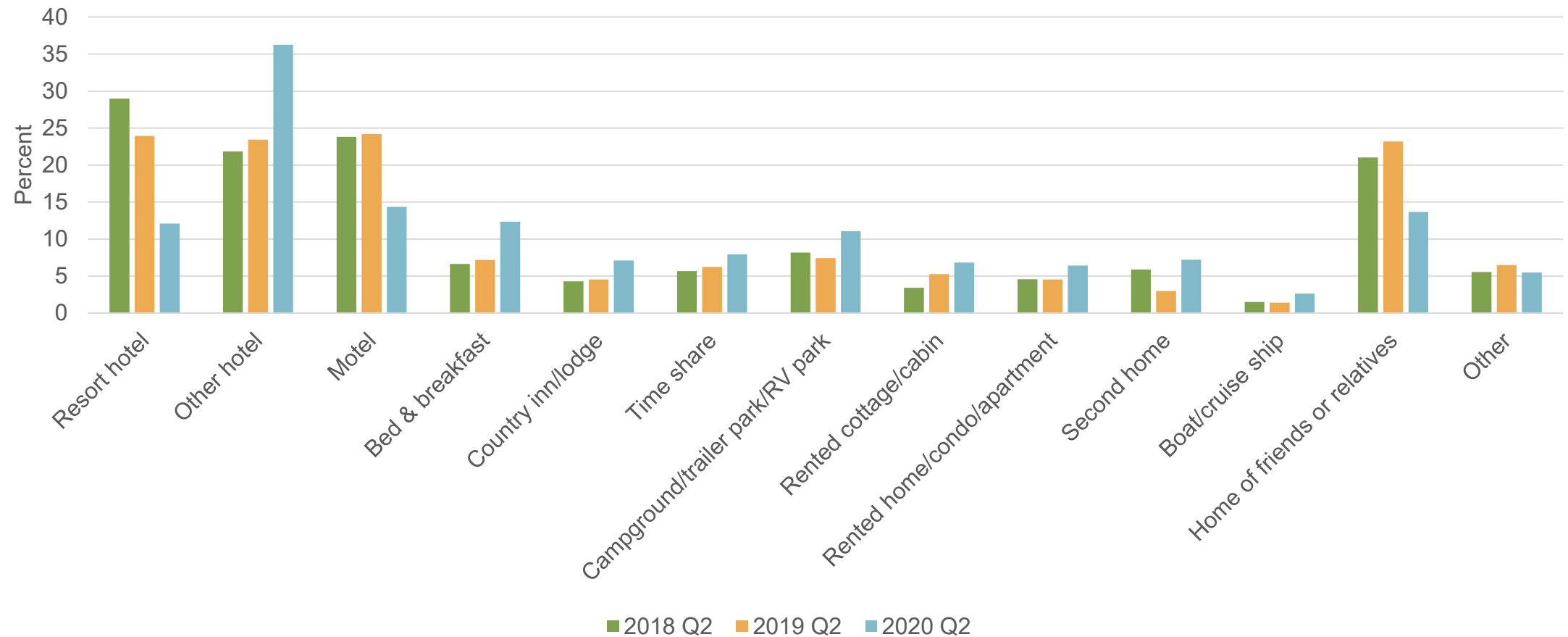
Source: Longwoods International

Total Nights Away



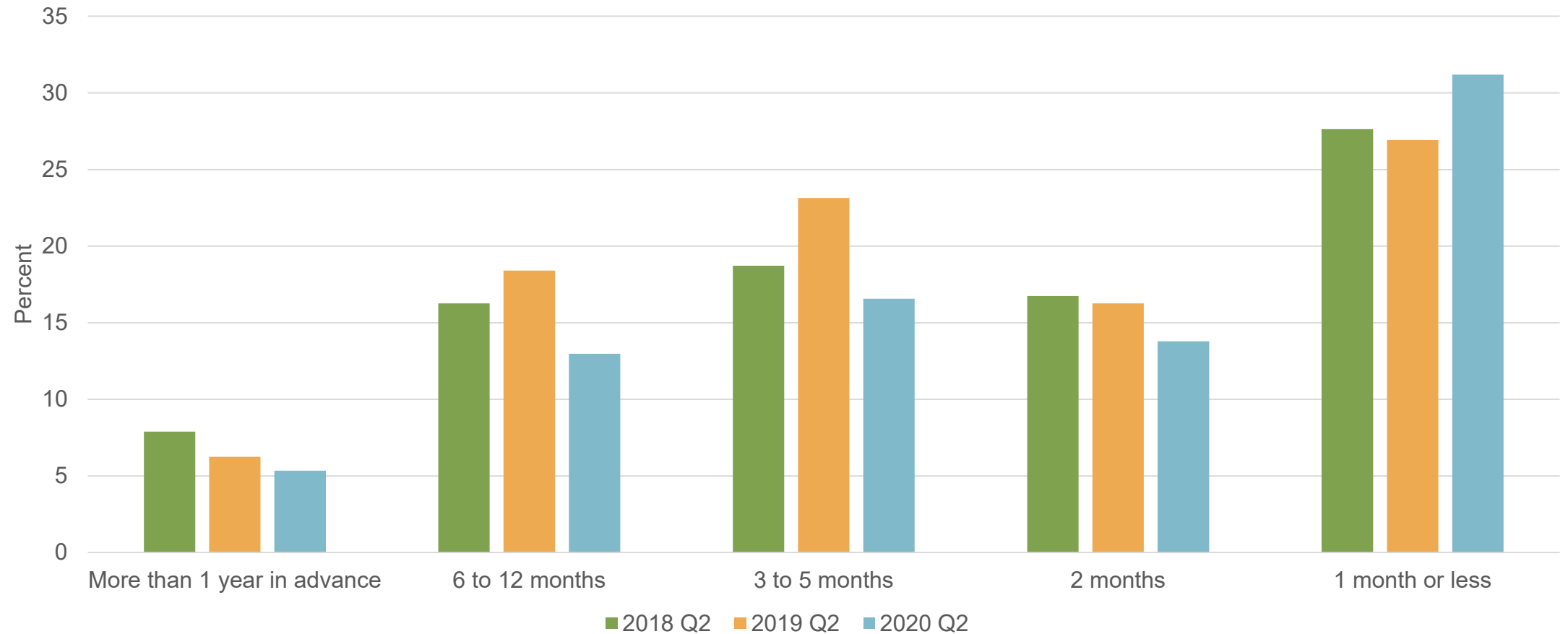
Source: Longwoods International

Accommodation Used



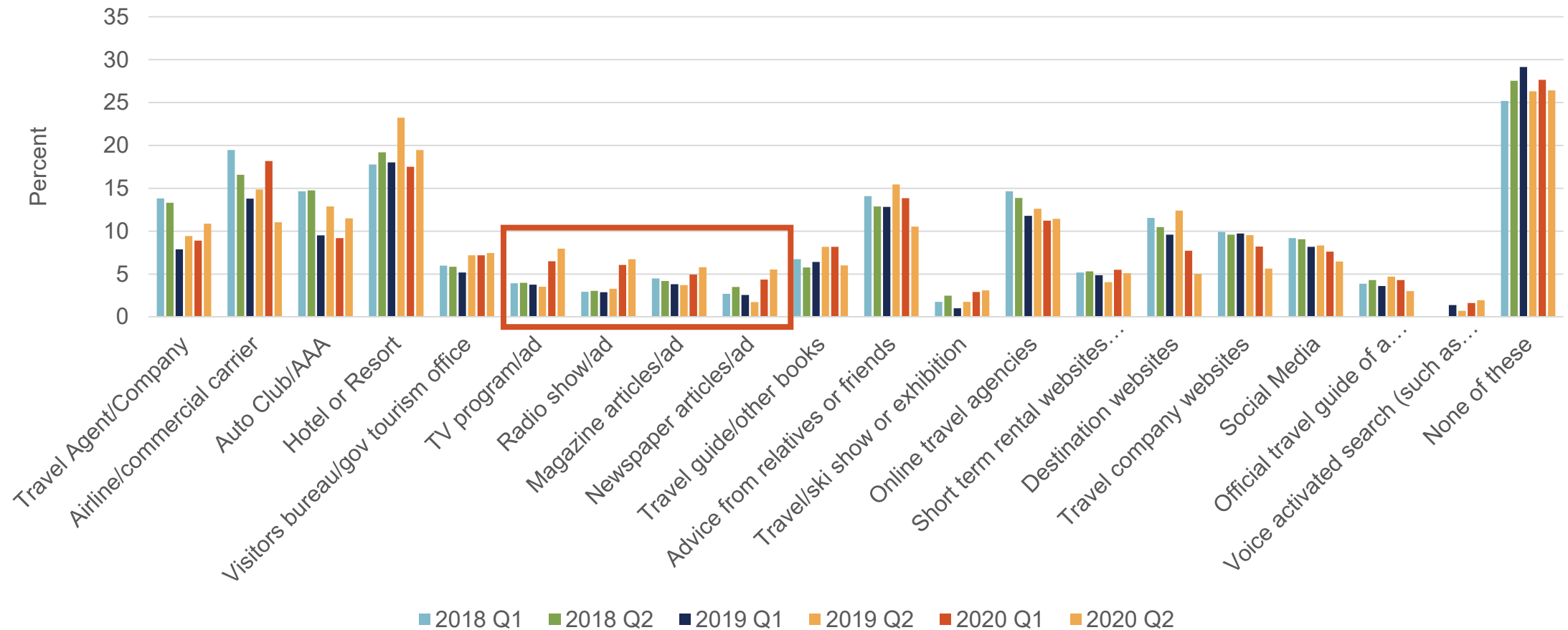
Source: Longwoods International

Length of Trip Planning



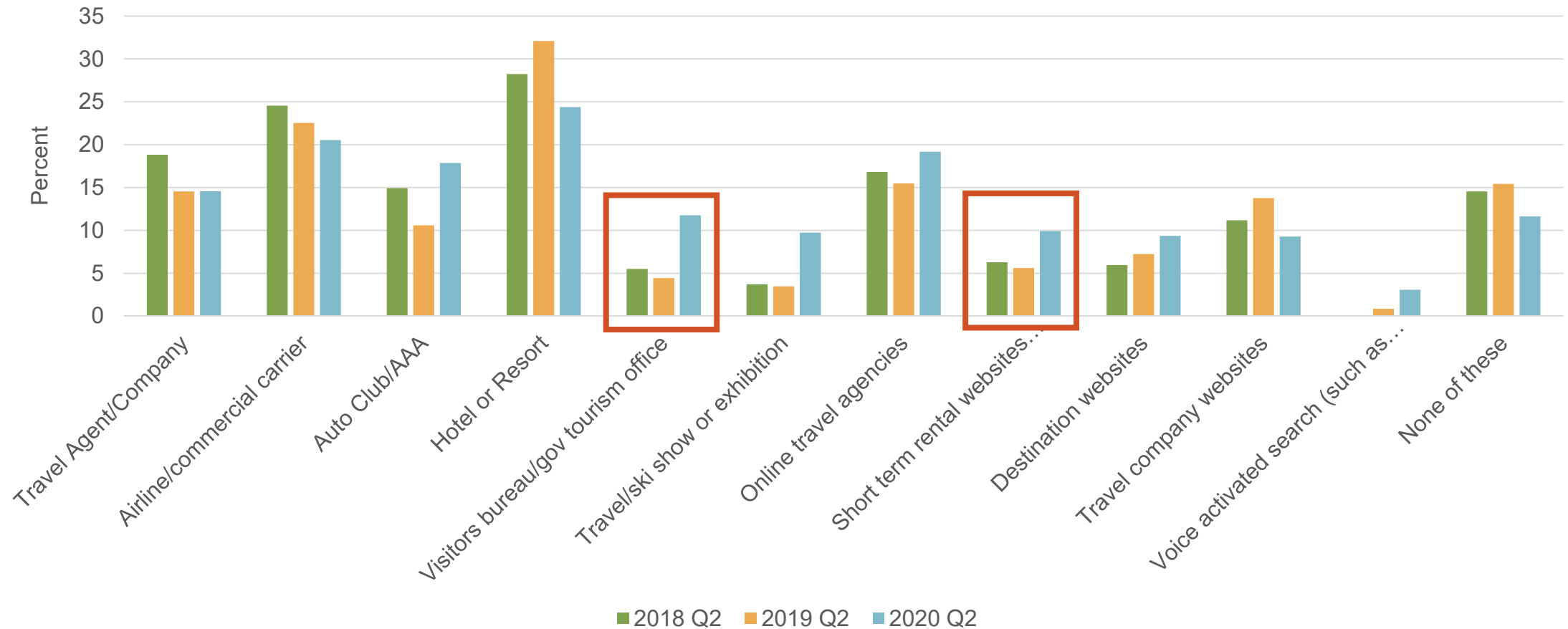
Source: Longwoods International

Trip Planning Information Sources



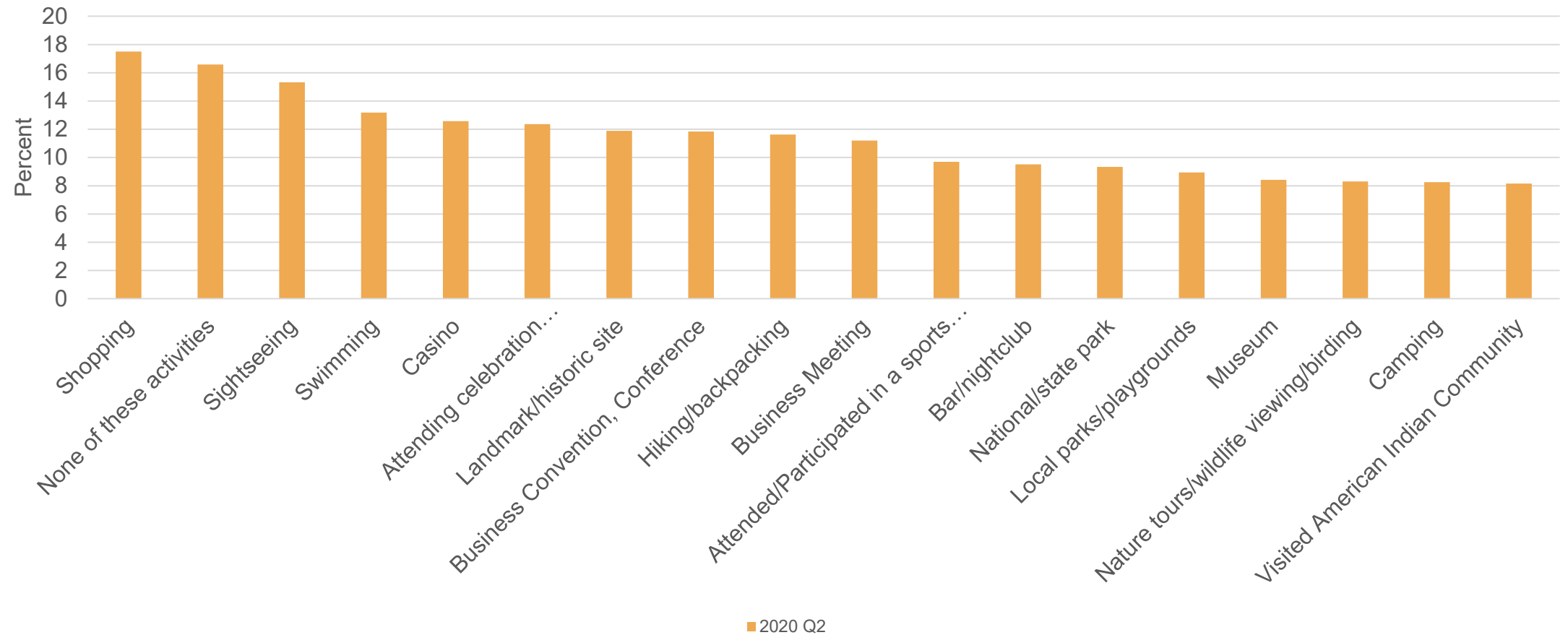
Source: Longwoods International

Method of Booking Trip



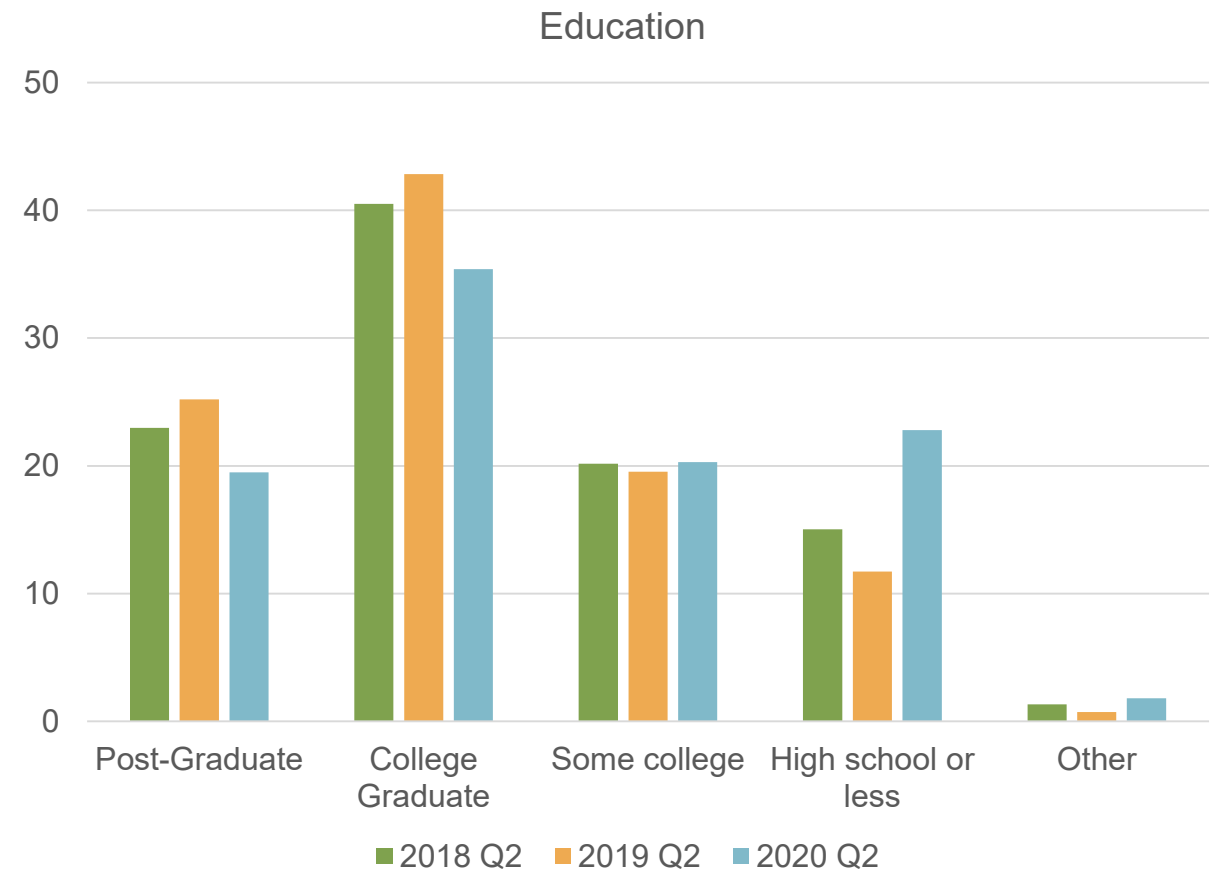
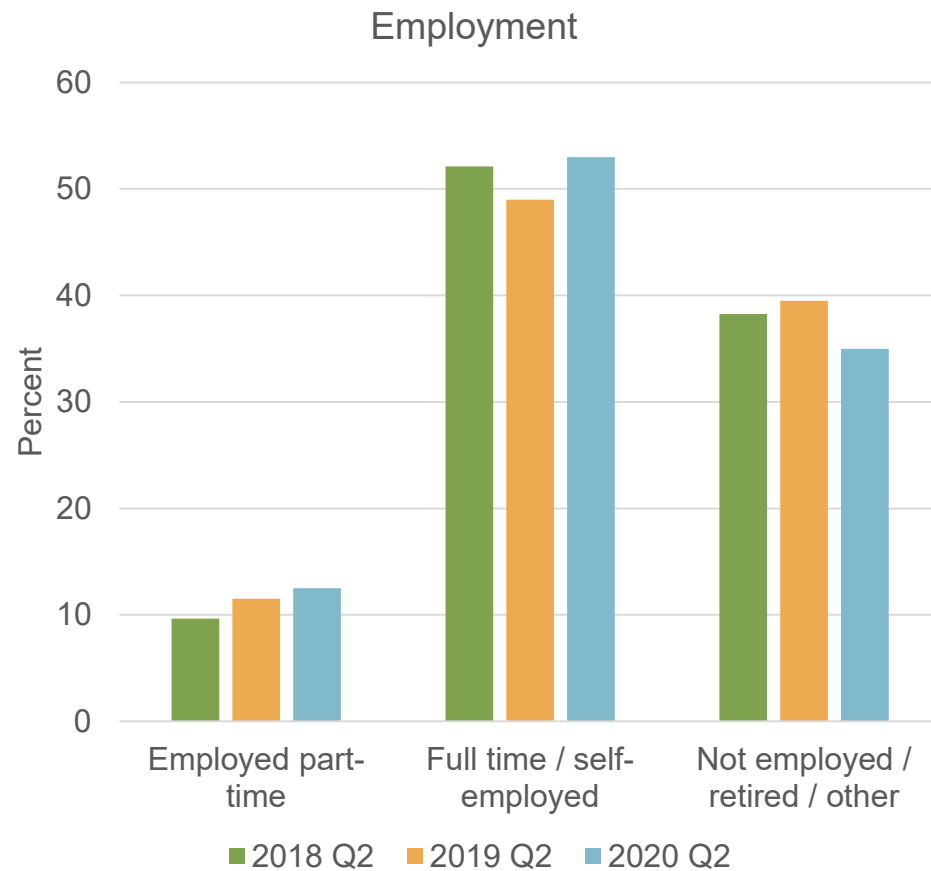
Source: Longwoods International

Activities



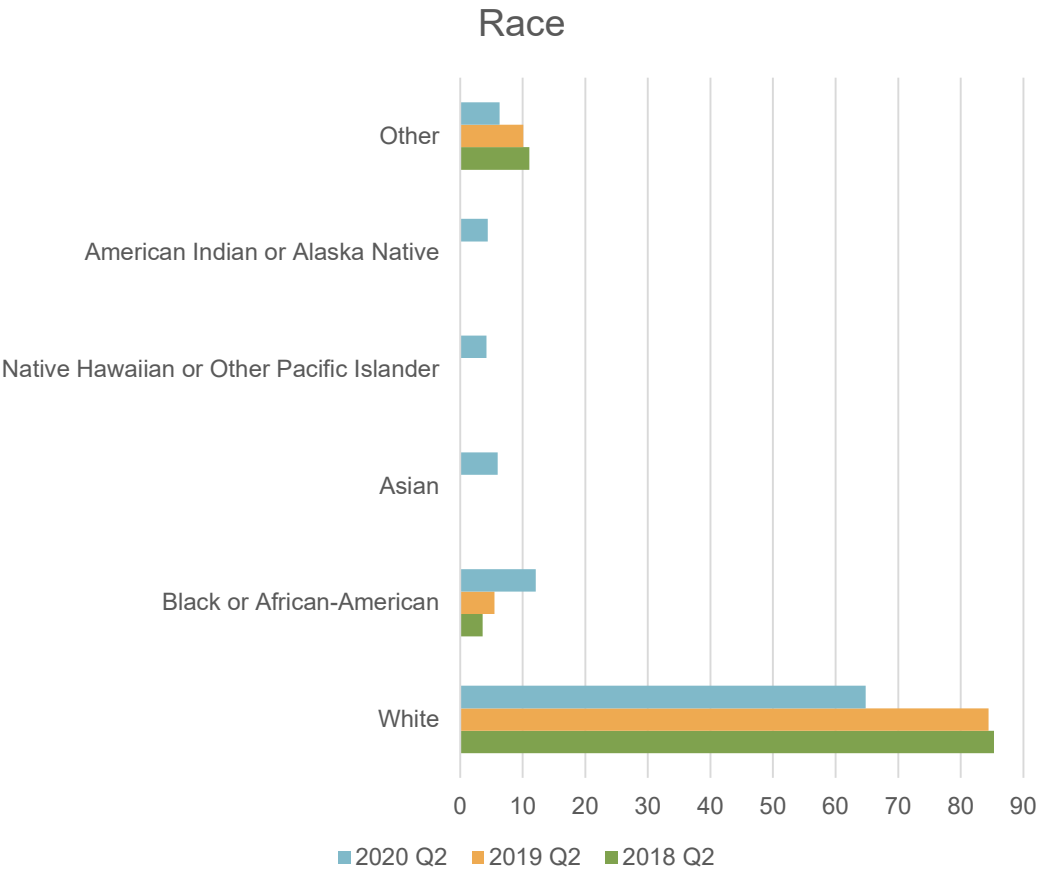
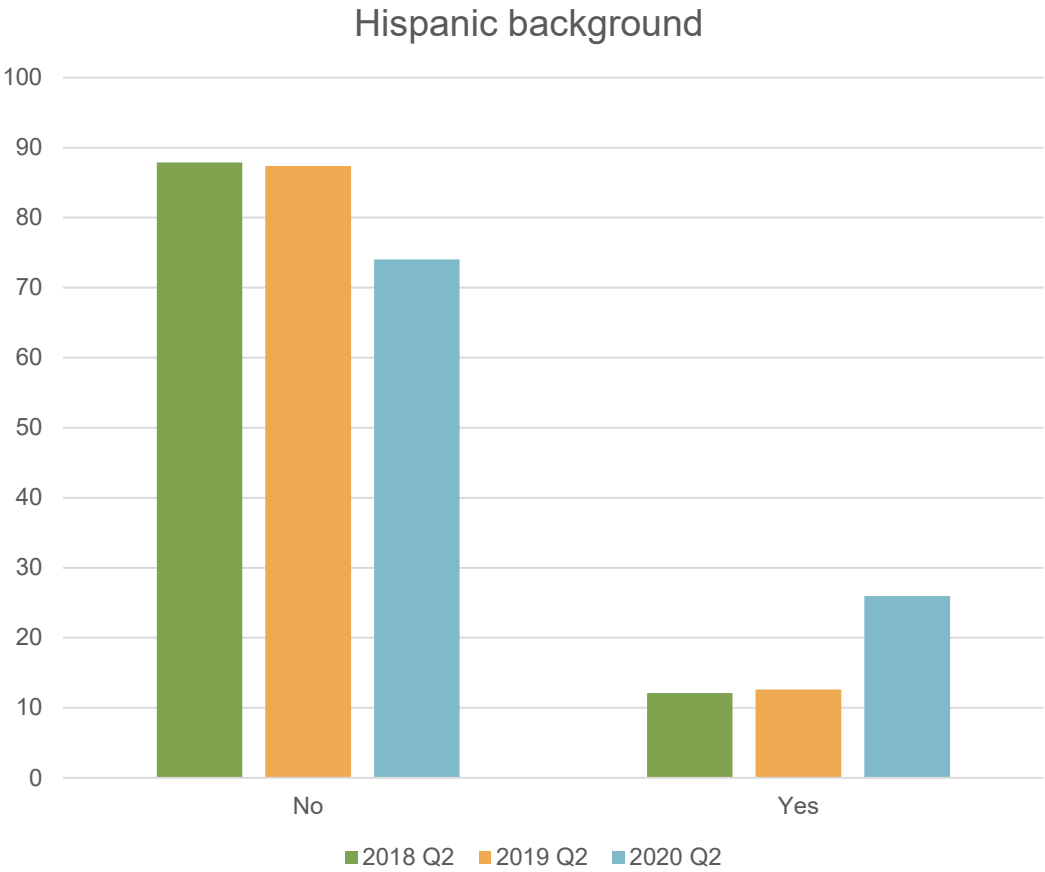
Source: Longwoods International

Demographics



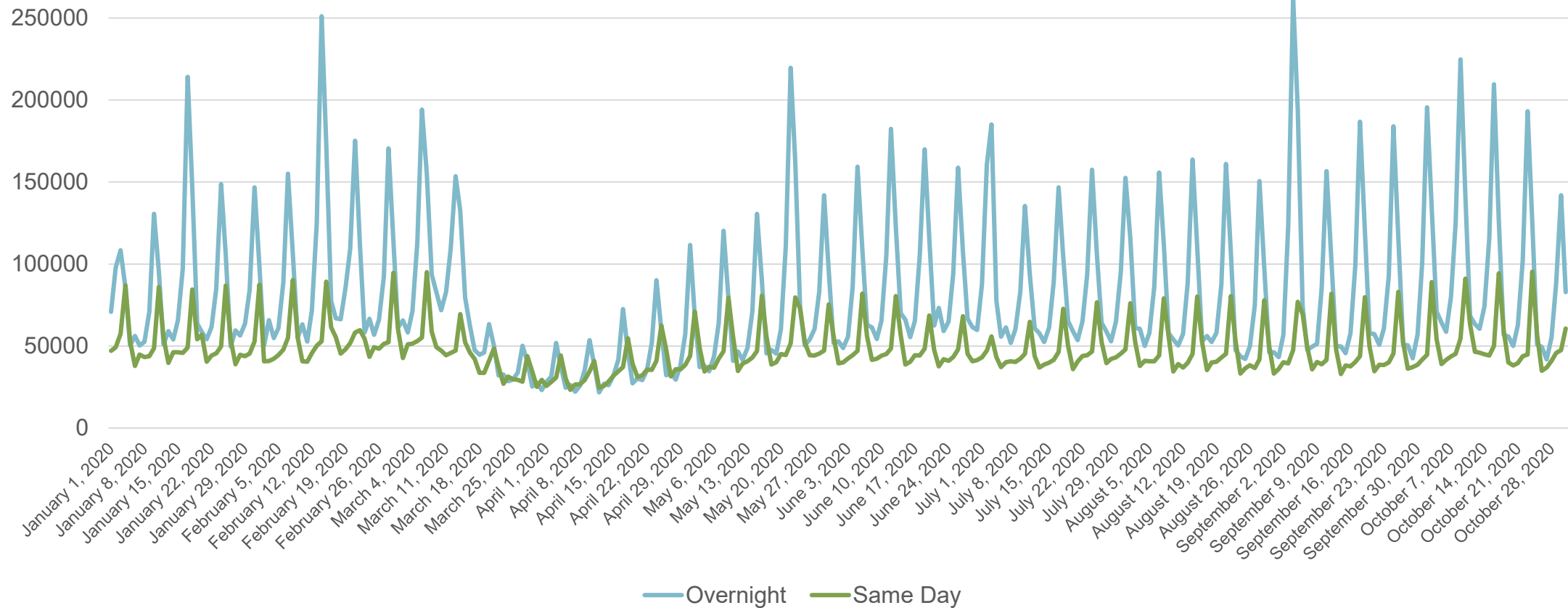
Source: Longwoods International

Demographics



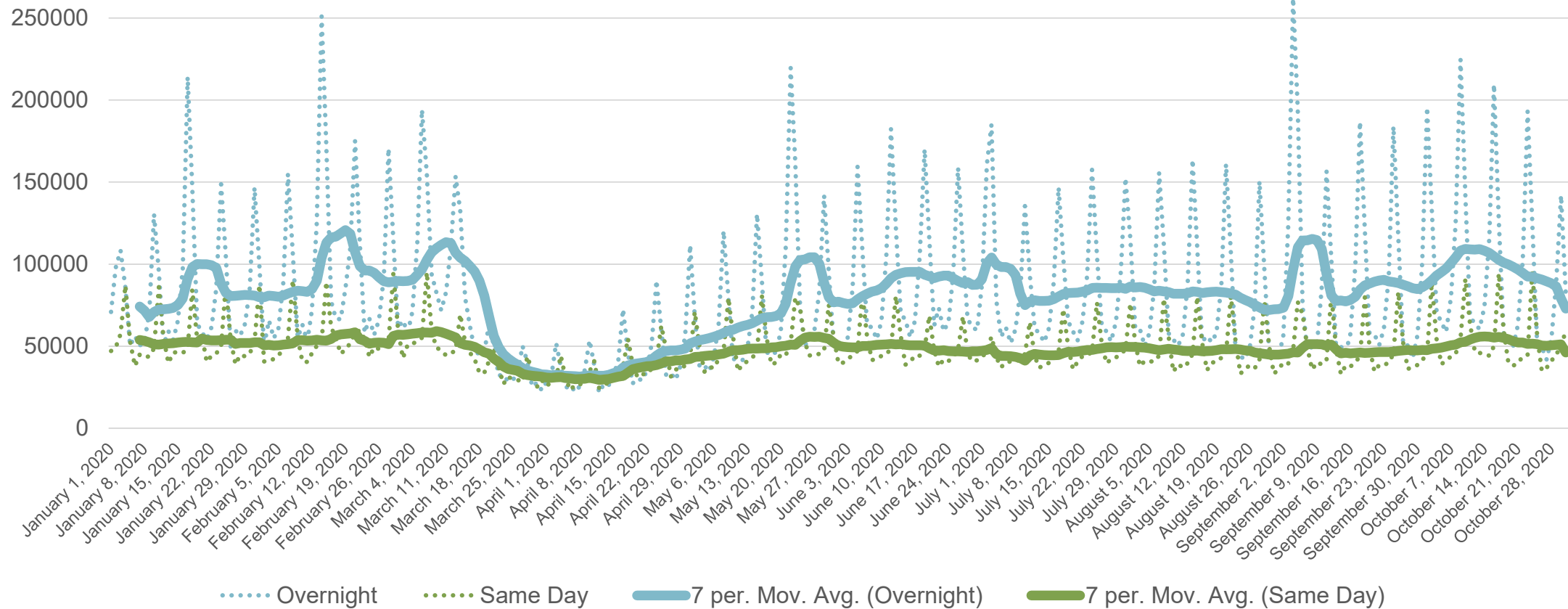
Source: Longwoods International

Arrival Patterns - Arizona



Source: Arrivalist

Arrival Patterns - Arizona

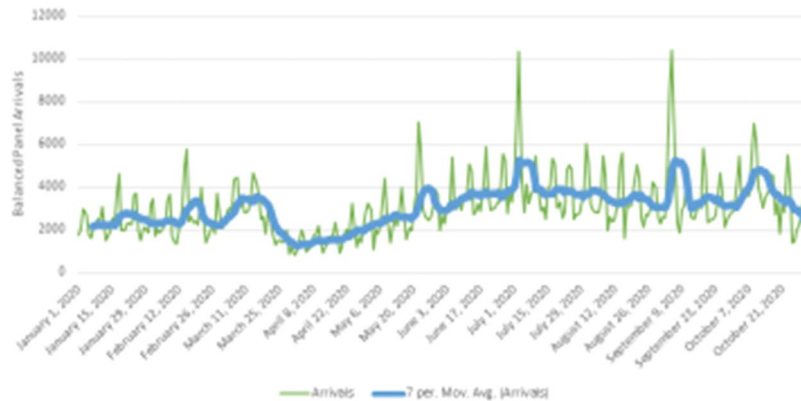


Source: Arrivalist

Apache County Visitation Data 2020



Trips by Arrival County Over Time



Top Post-COVID Origin Markets for Overnight Stays

Time Period: 3/15/2020-10/31/2020

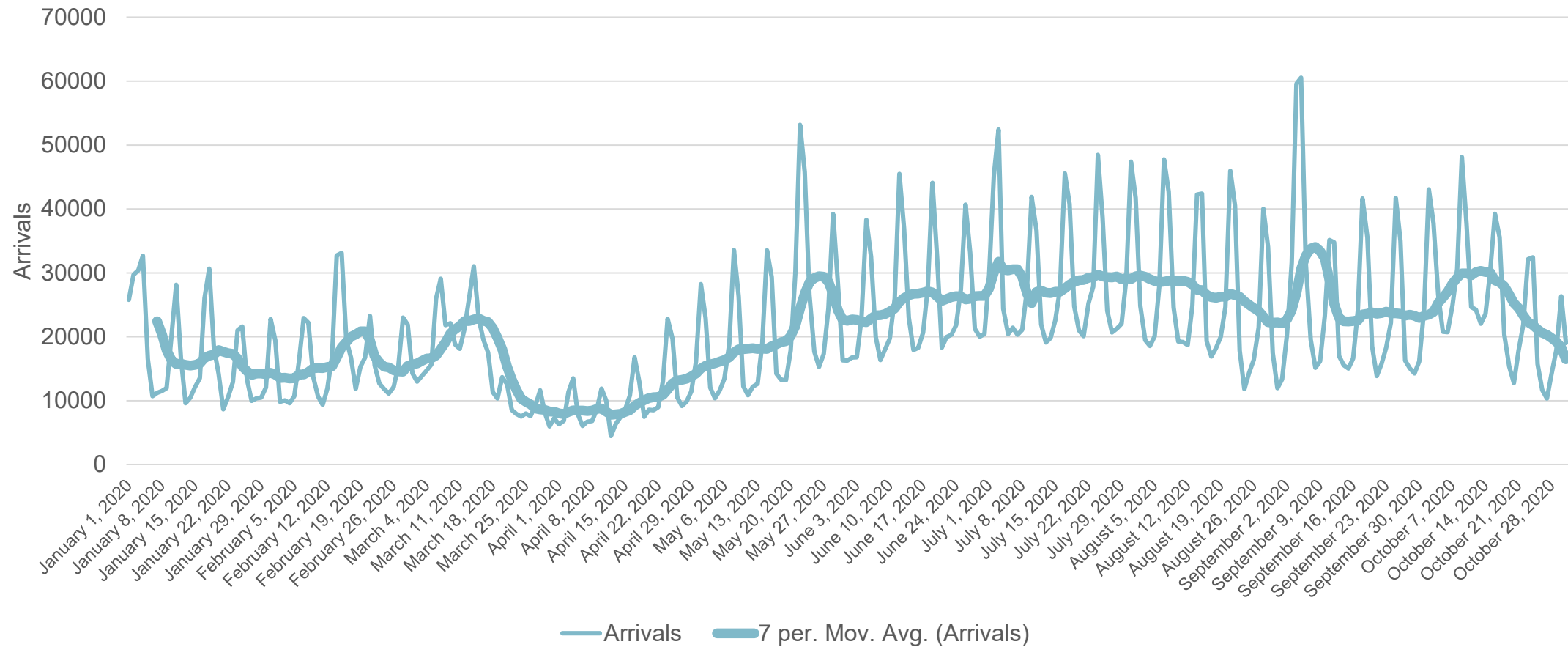
Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	36.10%	35%	1 Day, 23 Hours, 31 Minutes
Los Angeles	9.80%	35%	1 Day, 3 Hours, 12 Minutes
Tucson/Sierra Vista	6.70%	27%	3 Days, 0 Hours, 7 Minutes
Albuquerque/Santa Fe	6.60%	53%	1 Day, 21 Hours, 26 Minutes
Salt Lake City	2.70%	25%	2 Days, 7 Hours, 29 Minutes
Las Vegas	2.30%	26%	23 Hours
Sacramento/Stockton/Modesto	2.00%	34%	1 Day, 2 Hours, 59 Minutes
Fresno/Visalia	1.80%	40%	21 Hours
Denver	1.80%	10%	3 Days, 9 Hours, 4 Minutes
Dallas/Fort Worth	1.70%	14%	2 Days, 2 Hours, 41 Minutes

Source: Arrivallist

ARIZONA
OFFICE OF TOURISM

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

Coconino County



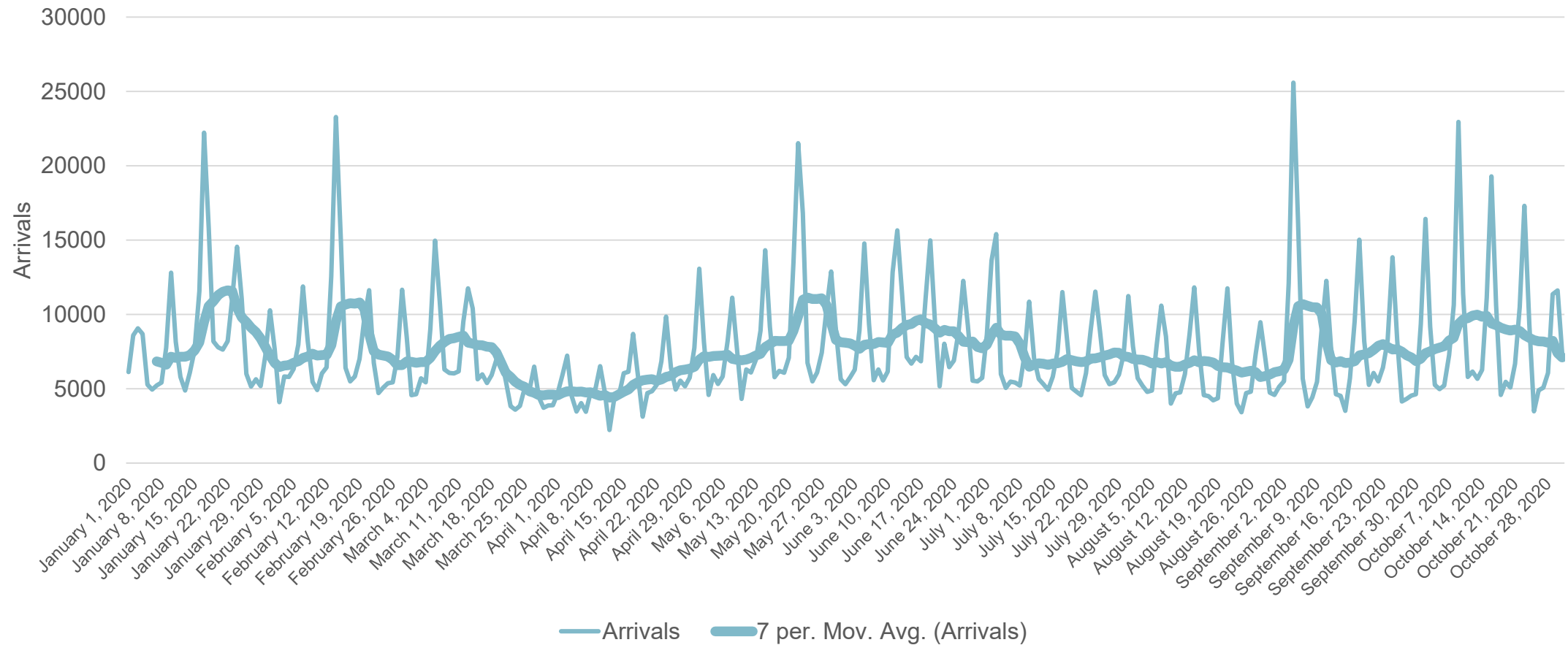
Source: Arrivalist

Coconino County

Overnight Visitors, March 15-Oct. 31

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	45.70%	47%	1 Day, 22 Hours, 4 Minutes
Los Angeles	8.40%	26%	1 Day, 22 Hours, 2 Minutes
Albuquerque/Santa Fe	4.70%	39%	1 Day, 18 Hours, 27 Minutes
Salt Lake City	3.90%	29%	2 Days, 11 Hours, 40 Minutes
Tucson/Sierra Vista	3.20%	27%	2 Days, 9 Hours, 28 Minutes
Las Vegas	2.50%	29%	1 Day, 17 Hours, 55 Minutes
Denver	1.50%	11%	3 Days, 7 Hours, 39 Minutes
San Diego	1.30%	11%	2 Days, 14 Hours, 21 Minutes
San Francisco/Oakland/San Jose	1.30%	7%	2 Days, 9 Hours, 12 Minutes
Dallas/Fort Worth	1.20%	12%	2 Days, 5 Hours, 22 Minutes

La Paz County



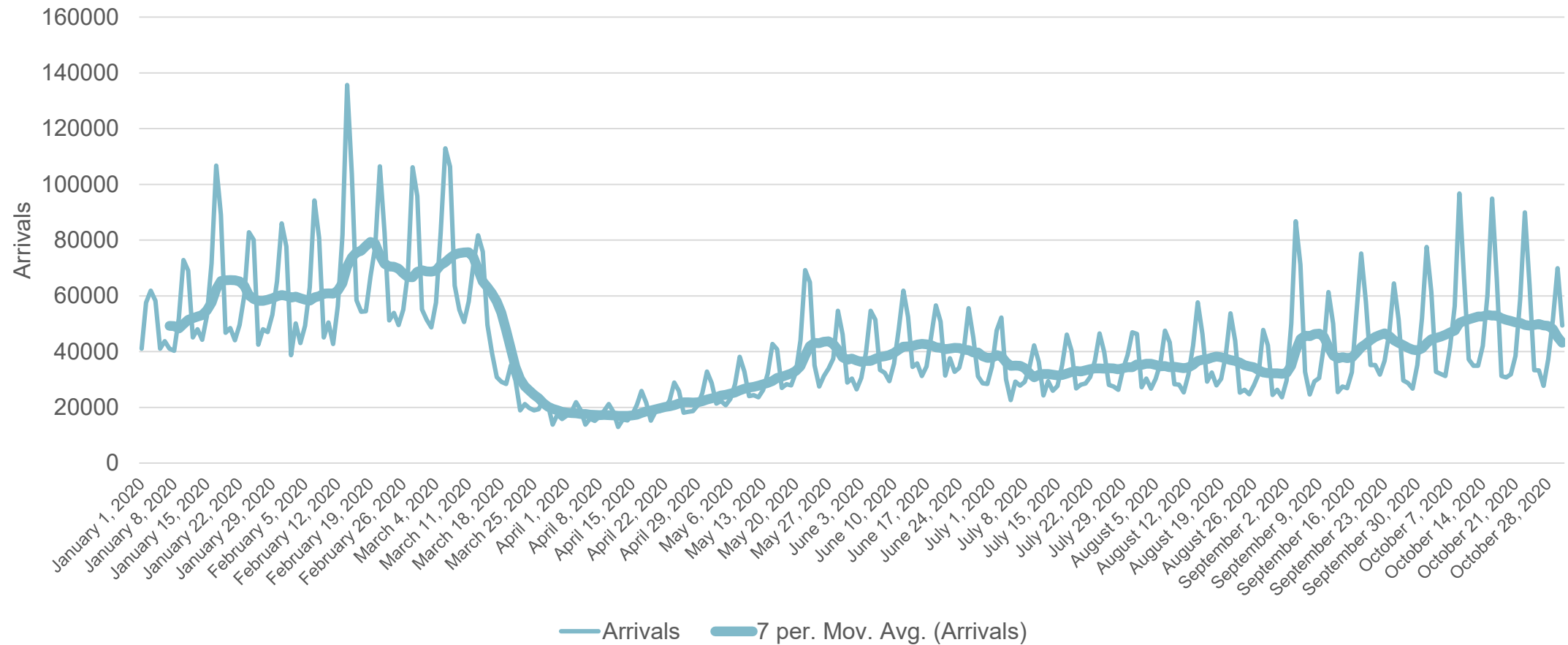
Source: Arrivalist

La Paz County

Overnight Visitors, March 15-Oct. 31

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Los Angeles	42.70%	43%	2 Days, 4 Hours, 57 Minutes
Phoenix	29.50%	38%	19 Hours
San Diego	3.40%	35%	2 Days, 15 Hours, 20 Minutes
Tucson/Sierra Vista	3.20%	33%	1 Day, 4 Hours, 22 Minutes
Fresno/Visalia	2.20%	56%	1 Day, 16 Hours, 35 Minutes
Sacramento/Stockton/Modesto	2.10%	46%	2 Days, 1 Hours, 30 Minutes
Palm Springs	1.80%	44%	1 Day, 23 Hours, 57 Minutes
Yuma/El Centro	1.60%	42%	1 Day, 18 Hours, 42 Minutes
El Paso	1.50%	62%	1 Day, 1 Hours, 56 Minutes
Bakersfield	1.10%	47%	1 Day, 18 Hours, 53 Minutes

Maricopa County



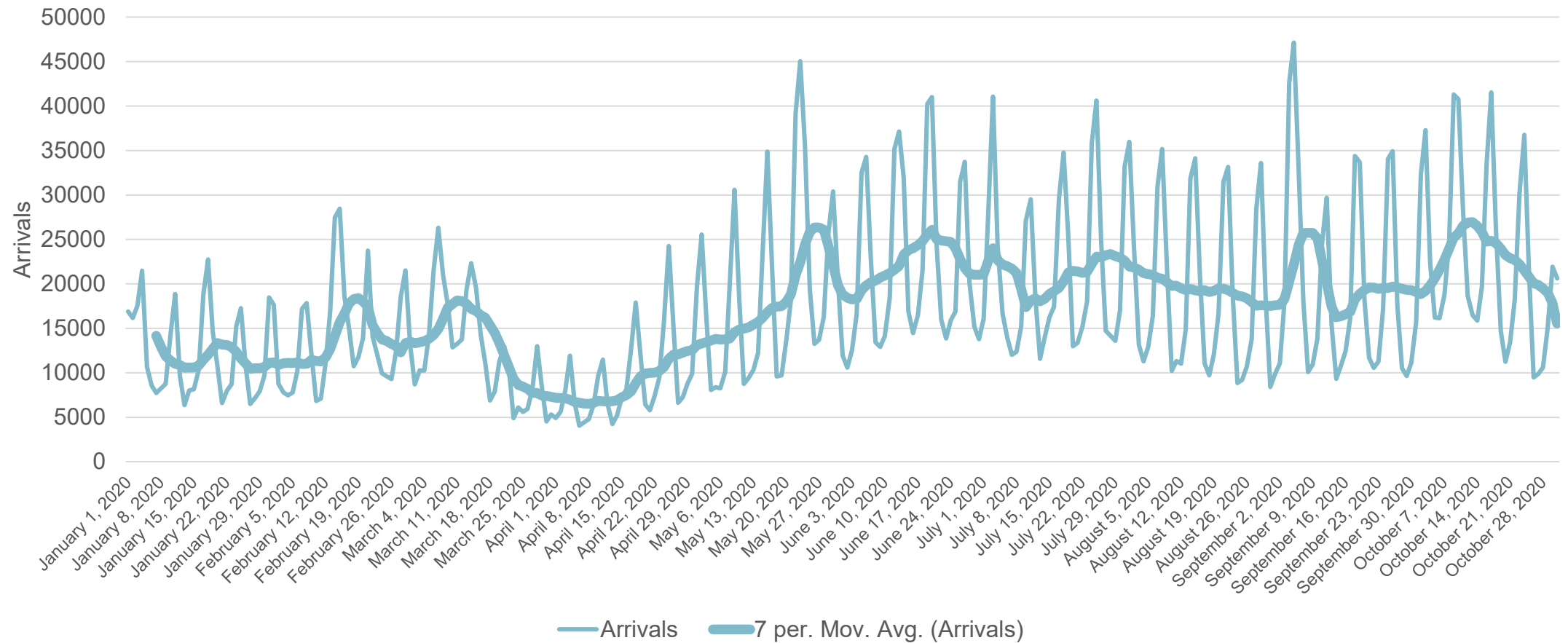
Source: Arrivalist

Maricopa County

Overnight Visitors, March 15-Oct. 31

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	14.60%	64%	1 Day, 17 Hours, 32 Minutes
Los Angeles	14.50%	40%	2 Days, 5 Hours, 41 Minutes
Tucson/Sierra Vista	11.40%	59%	1 Day, 13 Hours, 55 Minutes
Albuquerque/Santa Fe	3.20%	40%	2 Days, 12 Hours, 31 Minutes
San Diego	3.10%	33%	2 Days, 14 Hours, 14 Minutes
Las Vegas	2.60%	41%	2 Days, 5 Hours, 56 Minutes
Denver	2.50%	25%	3 Days, 7 Hours, 10 Minutes
Chicago	2.40%	21%	3 Days, 14 Hours, 44 Minutes
San Francisco/Oakland/San Jose	2.30%	24%	2 Days, 21 Hours, 44 Minutes
Yuma/El Centro	2.20%	58%	1 Day, 19 Hours, 59 Minutes

Yavapai County



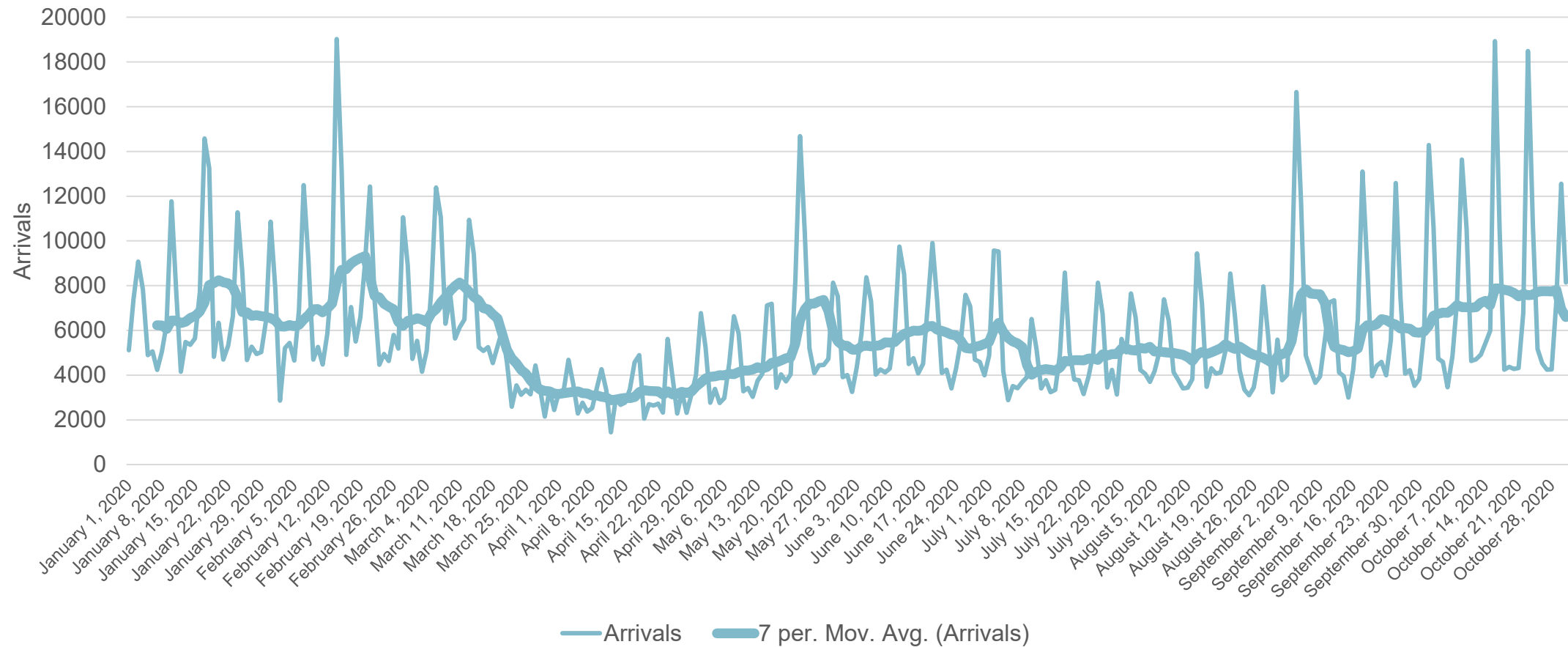
Source: Arrivalist

Yavapai County

Overnight Visitors, March 15-Oct. 31

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	44.50%	43%	1 Day, 16 Hours, 55 Minutes
Los Angeles	8.60%	22%	2 Days, 16 Hours, 13 Minutes
San Diego	7.40%	37%	2 Days, 14 Hours, 57 Minutes
Tucson/Sierra Vista	4.90%	29%	1 Day, 23 Hours, 30 Minutes
Salt Lake City	2.70%	23%	2 Days, 15 Hours, 45 Minutes
Las Vegas	1.90%	27%	2 Days, 4 Hours, 17 Minutes
Albuquerque/Santa Fe	1.70%	29%	2 Days, 10 Hours, 39 Minutes
Chicago	1.30%	7%	4 Days, 5 Hours, 20 Minutes
San Francisco/Oakland/San Jose	1.20%	6%	3 Days, 10 Hours, 52 Minutes
Denver	1.10%	9%	3 Days, 16 Hours, 28 Minutes

Yuma County



Source: Arrivalist

Yuma County

Overnight Visitors, March 15-Oct. 31

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	32.80%	35%	20 Hours
San Diego	21.10%	40%	2 Days, 12 Hours, 21 Minutes
Los Angeles	9.50%	36%	1 Day, 18 Hours, 17 Minutes
Tucson/Sierra Vista	7.80%	38%	1 Day, 1 Hours, 52 Minutes
Yuma/El Centro	4.60%	55%	1 Day, 9 Hours, 18 Minutes
Las Vegas	1.20%	33%	1 Day, 13 Hours, 54 Minutes
Sacramento/Stockton/Modesto	1.20%	30%	1 Day, 21 Hours, 48 Minutes
Monterey/Salinas	1.20%	48%	2 Days, 5 Hours, 34 Minutes
Fresno/Visalia	1.10%	39%	1 Day, 9 Hours, 46 Minutes
Salt Lake City	1.10%	26%	2 Days, 11 Hours, 59 Minutes

Resources

- www.tourism.az.gov
- <https://covid19.milespartnership.com/>
- <https://www.ustravel.org/toolkit/covid-19-travel-industry-research>
- <https://www.visitarizona.com/leave-no-trace/> (for consumers)
- <https://tourism.az.gov/leavenotrace/> (for destinations)

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- Lena Allen, llen@tourism.az.gov

A photograph of a desert landscape featuring several tall saguaro cacti of varying heights and shapes. The cacti are green with visible spines and are surrounded by low-lying desert shrubs and bushes. The background is a clear blue sky with some light clouds. The text "Thank You!" is centered over the image in a large, black, sans-serif font.

Thank You!