2020 Tourism Performance
Arizona Tourism in 2020

32.1 million Overnight Visitors

$15 billion Travel Spending
Arizona Tourism in 2020

32.1 million Overnight Visitors

$15 billion Travel Spending

-31%

-41%
Domestic Visitation to Arizona

Source: Tourism Economics, 2020
Domestic Visitation Change by Segment

YOY Change

- Overnight Leisure: -22.6%
- Overnight Business: -42.1%

- Overnight Resident: -18.6%
- Overnight Nonresident: -28.5%

Source: Tourism Economics, 2020
Perceived Safety of Travel Activities

% Somewhat unsafe or Very unsafe

- Taking a road trip
- Visiting friends and relatives
- Non-team outdoor recreation (biking, hiking, etc.)
- Staying in a hotel
- Dining in a restaurant
- Visiting an amusement park, zoo, gardens, parks or other outdoor...
- Visiting a museum, aquarium, landmarks or other indoor attraction
- Traveling for business reasons
- Staying in an Airbnb or home rental
- Attending a conference or convention
- Sporting events - Large venue

Source: Destination Analysts
Arizona’s Share of Adult Domestic Overnight Trips

Source: Longwoods International
Arizona’s Share of Domestic Overnight Trips, 2019

- Golf: 6.0%
- Touring: 4.8%
- Outdoor: 4.2%
- Special Event: 3.0%
- City: 2.4%

Source: Longwoods International, 2019
Arizona’s Share of Domestic Overnight Trips, 2020

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golf</td>
<td>8.6%</td>
</tr>
<tr>
<td>Touring</td>
<td>6.9%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>6.1%</td>
</tr>
<tr>
<td>Special Event</td>
<td>5.7%</td>
</tr>
<tr>
<td>City</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

Source: Longwoods International, 2020
Mobile Device Arrivals

Source: Arrivalist A3, U.S. Calibrated Data, retrieved 7/26/21
Mobile Device Arrivals

Source: Arrivalist A3, U.S. Calibrated Data, retrieved 7/26/21
Mobile Device Arrivals

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Domestic Visitation Change by Segment

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-22.6%

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-42.1%

YOY Change 2020

Overnight Resident
-18.6%

Overnight Nonresident
-28.5%

Source: Tourism Economics, 2020
Arizona Resident Travel

Arizona Residents in 2020

Source: Arrivalist A3, U.S. Calibrated Data, retrieved 7/26/21
SPENDING DYNAMICS
Total Travel Spending

Source: Dean Runyan Associates, 2020
Total Travel Spending - YOY Change

Source: Dean Runyan Associates, 2020p
Total Spend by Commodity Purchased

Source: Dean Runyan Associates, 2020
Total Spend by Commodity Purchased – YOY Change

% Change from 2019

- Accommodations: -31.5%
- Food Service: -36%
- Food Stores: -35.6%
- Local Transportation & Gas: -45.1%
- Arts, Entertainment, & Recreation: -33.2%
- Retail Sales: -38.3%
- Visitor Air Transportation: -39%

Source: Dean Runyan Associates, 2020
Change in Total Spend by Commodity Purchased – West Coast Region

- Accommodations: 2%
- Arts, Ent. & Rec.: -20%
- Food Service: -23%
- Food Stores: -27%
- Local Tran. & Gas: -39%
- Retail Sales: -27%
- Visitor Air Tran.: -46%

Source: Dean Runyan Associates, 2020p
Change in Total Spend by Commodity Purchased – Northern Region

Source: Dean Runyan Associates, 2020
Change in Total Spend by Commodity Purchased – Apache County

Source: Dean Runyan Associates, 2020p
# Arizona Travel Impacts Dashboard

## Arizona Travel Industry Impacts

<table>
<thead>
<tr>
<th></th>
<th>Arizona</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Spending</td>
<td><strong>$15.0 Billion</strong></td>
<td>YOY Chg: <strong>-41.2%▼</strong></td>
<td></td>
</tr>
<tr>
<td>Employment</td>
<td><strong>160.5 Thousand</strong></td>
<td>YOY Chg: <strong>-17.4%▼</strong></td>
<td></td>
</tr>
<tr>
<td>Tax Revenue</td>
<td><strong>$2.7 Billion</strong></td>
<td>YOY Chg: <strong>-28.1%▼</strong></td>
<td></td>
</tr>
<tr>
<td>Earnings</td>
<td><strong>$6.7 Billion</strong></td>
<td>YOY Chg: <strong>-12.9%▼</strong></td>
<td></td>
</tr>
<tr>
<td>Tax Revenue Per HH</td>
<td><strong>$550</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Total Visitation To Arizona in 2020

32.1 Million Overnight Visits

Source: Tourism Economics

Subject to change as new data becomes available

## Direct Travel Spending 10-Year Trend

<table>
<thead>
<tr>
<th>Arizona Direct Travel Spending (Billions$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10.0</td>
</tr>
</tbody>
</table>

### Spending by Accommodation Type, 2020

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>10%</th>
<th>20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel, Motel, STVR</td>
<td>$2.6B</td>
<td>17.5%</td>
</tr>
<tr>
<td>Private Home</td>
<td>$1.2B</td>
<td>15.0%</td>
</tr>
<tr>
<td>Day Travel</td>
<td>$2.2B</td>
<td>17.5%</td>
</tr>
<tr>
<td>2nd Home</td>
<td>$1.2B</td>
<td>5.9%</td>
</tr>
<tr>
<td>Campground</td>
<td>$1.0B</td>
<td>5.1%</td>
</tr>
</tbody>
</table>

Source: Dean Runyan Associates, 2020p
Spend by Commodity Purchased – Local Transportation & Gas

Source: Dean Runyan Associates, 2020p
Statewide Fuel Distribution

Gasoline Distribution Q1 and Q2

Source: Arizona Dept. of Transportation, County Distribution Summary Report
Average Per-Person Spend in Arizona

Source: Longwoods International
Preliminary Monthly Estimates

Source: Dean Runyan Associates, 7/26/21, PRELIMINARY
Preliminary Monthly Estimates

Estimated Visitor Spending

Source: Dean Runyan Associates, 7/26/21, PRELIMINARY
Preliminary Monthly Estimates

Source: Dean Runyan Associates, 7/26/21, PRELIMINARY
Spending in Arizona by Origin

2019

- Other U.S.: 59%
- International: 20%
- Arizona: 21%

2020

- Other U.S.: 62%
- International: 7%
- Arizona: 31%

Source: Dean Runyan Associates, 2019 and 2020
VISITOR PROFILE
Accommodation Choice

Source: Longwoods International
Accommodation Choice

Source: Longwoods International
Accommodation Choice

Source: Longwoods International
Airbnb Booking Window

Source: AirDNA
Length of Trip Planning

Source: Longwoods International
Total Nights Away

2019: 4.7 Nights
2020: 5.1 Nights

Source: Longwoods International
Travel Party Composition

Source: Longwoods International
Information Sources for Trip Planning

Source: Longwoods International
Activities Participated

Source: Longwoods International
Activities Participated

Source: Longwoods International
Source: Longwoods International
Exhibit 3: Arizona Jobs by Industry, Change From February 2020 to June 2021, Seasonally Adjusted, Thousands

Traveler Sentiment

Excitement to Travel Now

Source: Destination Analysts