

Agenda

- Statewide Recap and 2021 so far
- Economic Impact of COVID on travel to the North Central Region
- 2021 Regional Tourism Indicators
- 2021 Traveler Behaviors
 - Survey Data
 - Mobile Device Location Data
- Resident and Traveler Sentiment

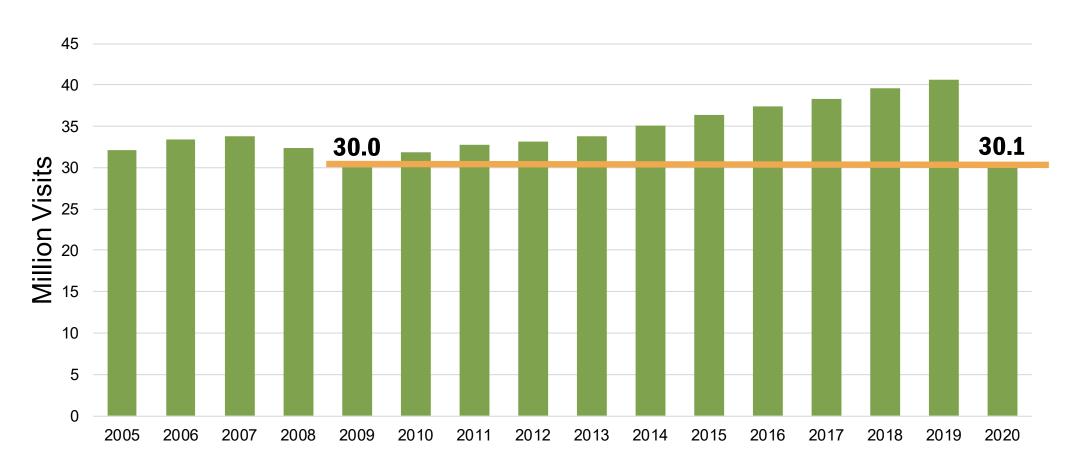








Domestic Overnight Visitation Arizona

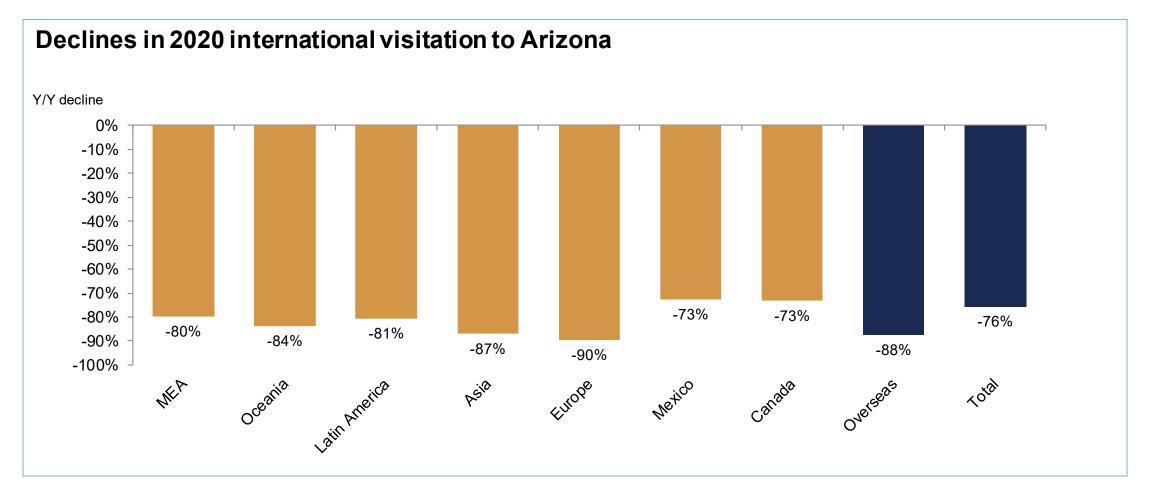






International Visitation to Arizona

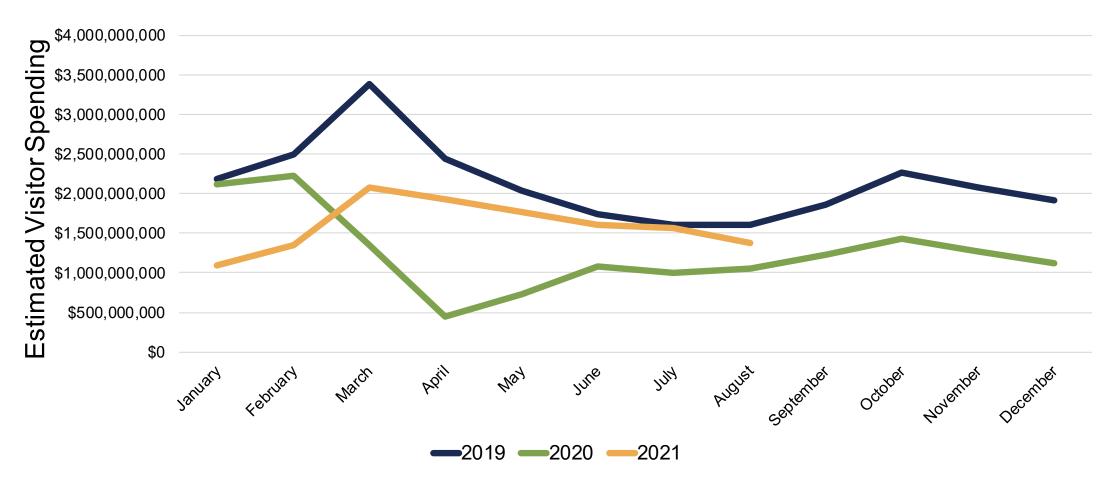
YOY % Change (2020 v. 2019)





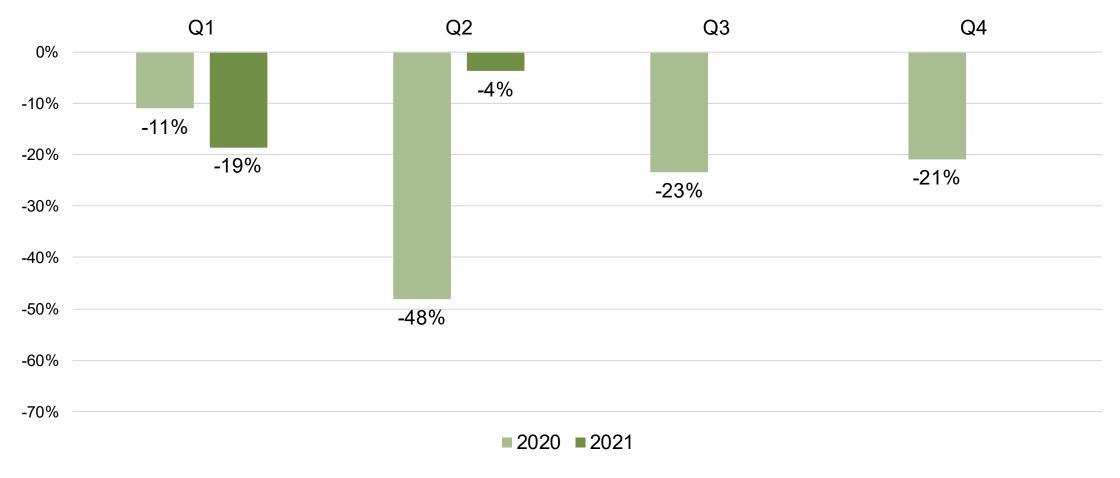


Travel Spending Trend Arizona



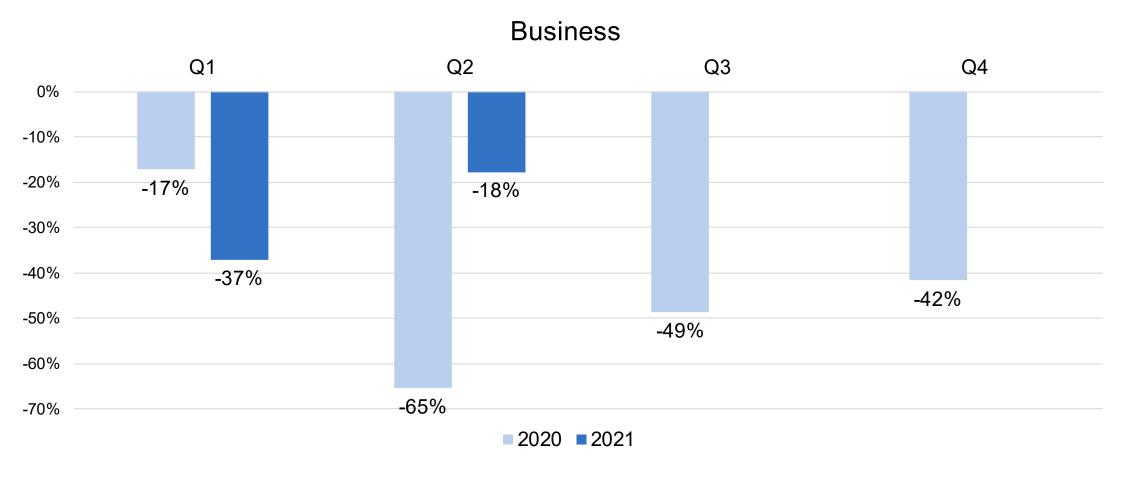






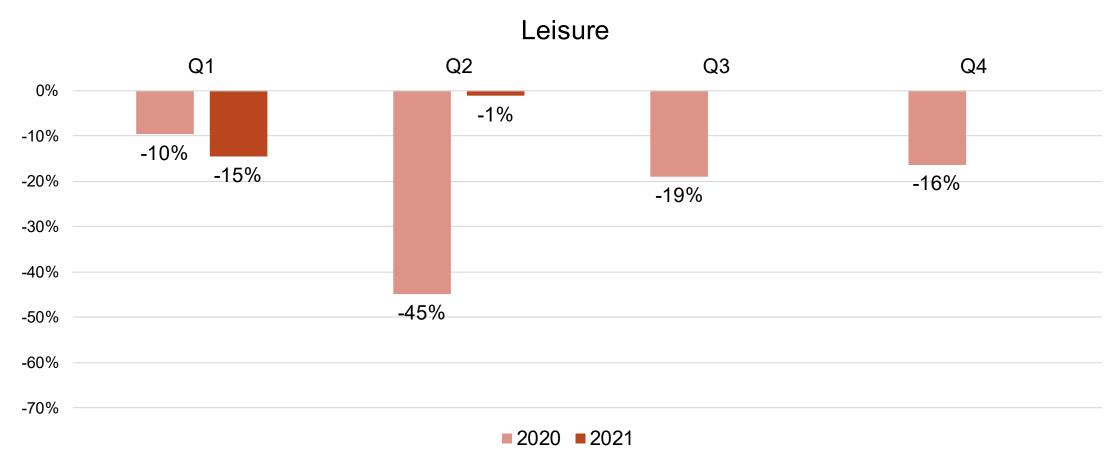






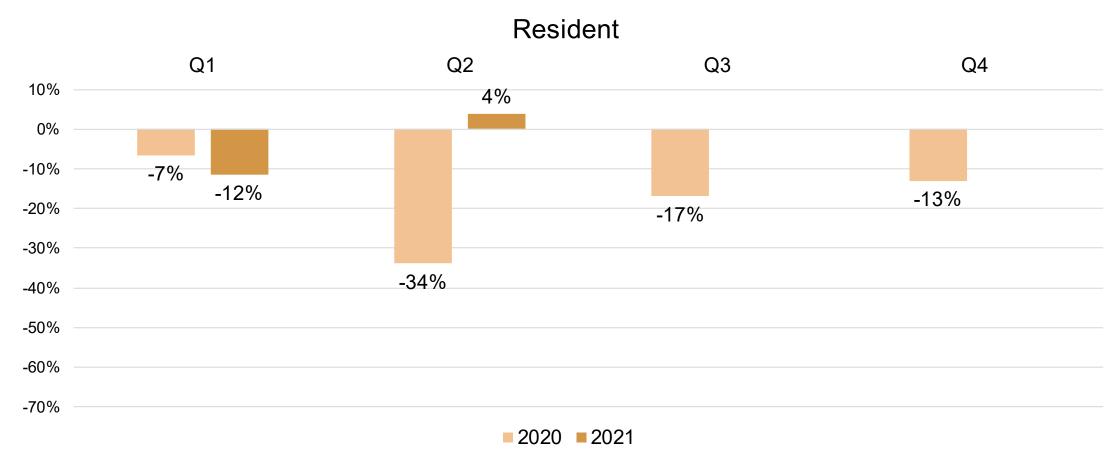








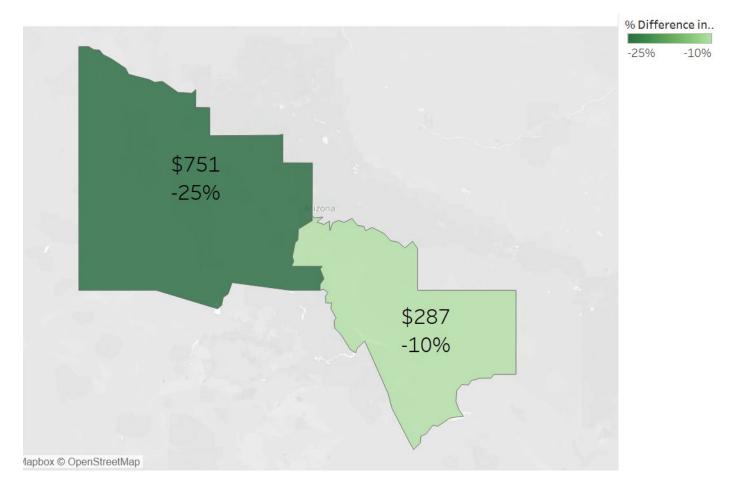








2020 Visitor Spending (\$ Millions and YOY % Change)







2020 Travel Impacts

(YOY Difference and % Change)

Gila County

Direct Travel Spending

-\$33 Million -10.5%

Accommodations Spending

\$6 Million 18.5%

Local Tax Receipts

-\$800,000 -7.6%

Food Service Spending

-\$8.9 Million

Employment*

-160 jobs -5.2%

Earnings*

-\$700,000

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

*Employment and Earnings include CARES Act support



2020 Travel Impacts

(YOY Difference and % Change)

Yavapai County

Direct Travel Spending

-\$249 Million -24.9%

Accommodations Spending

-\$22.9 Million -8.4% **Local Tax Receipts**

-\$8.9 Million

Food Service Spending

-\$62.6 Million

Employment*

-1,670 jobs -16.2%

Earnings*

-\$26.3 Million -9.2%



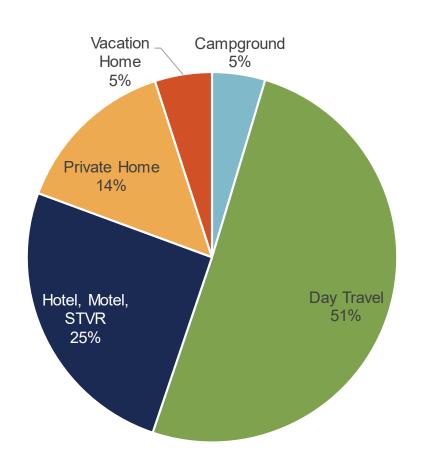
*Employment and Earnings include CARES Act support

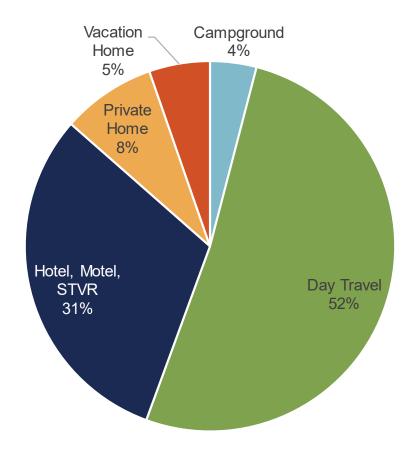




Spending by Accommodation Choice Gila County

2019 2020



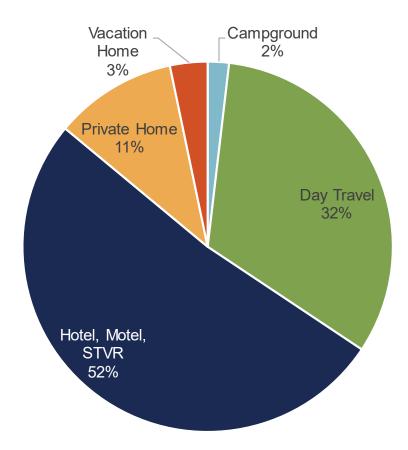


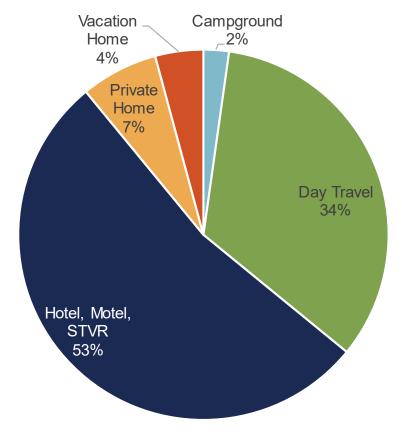




Spending by Accommodation Choice Yavapai County

2019 2020



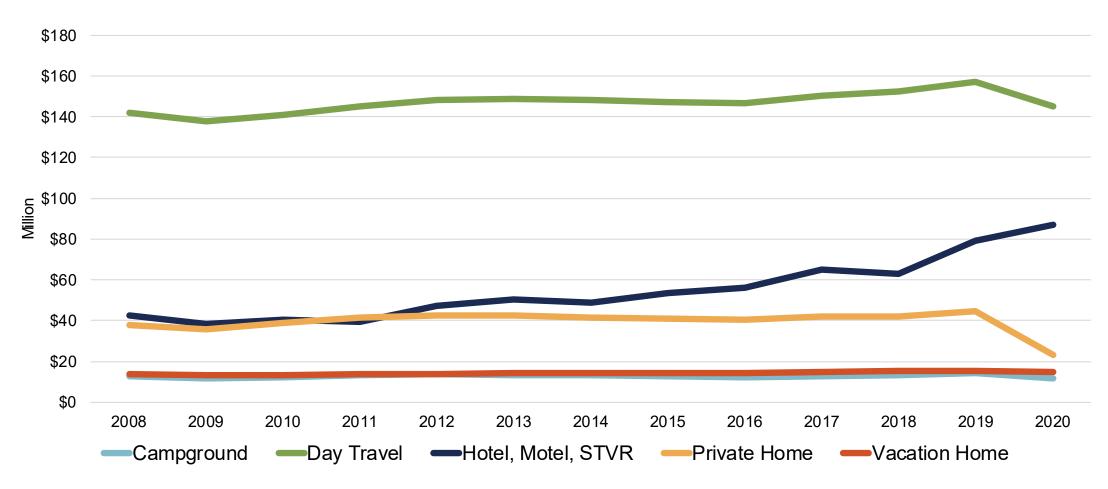








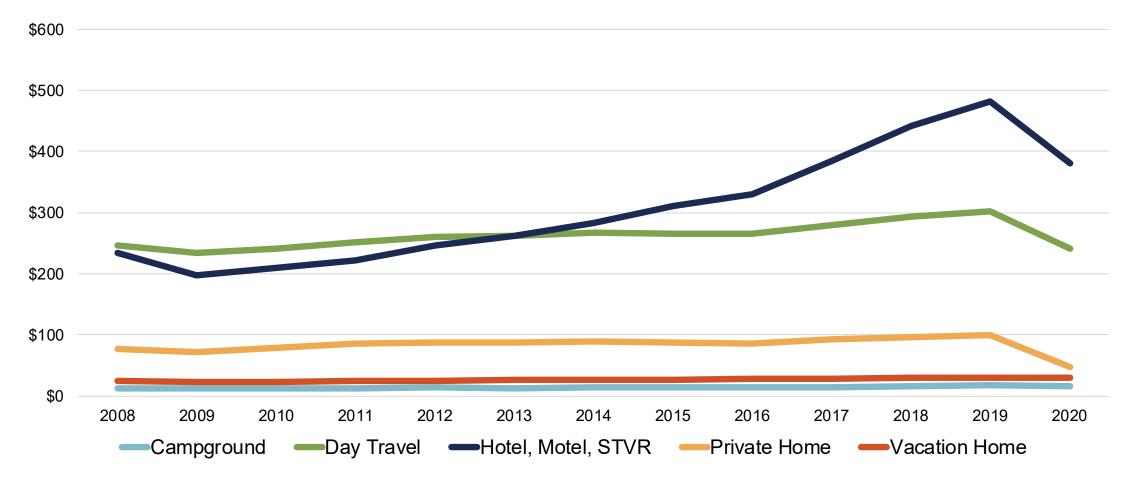
Spending by Accommodation Choice Gila County







Spending by Accommodation Choice Yavapai County

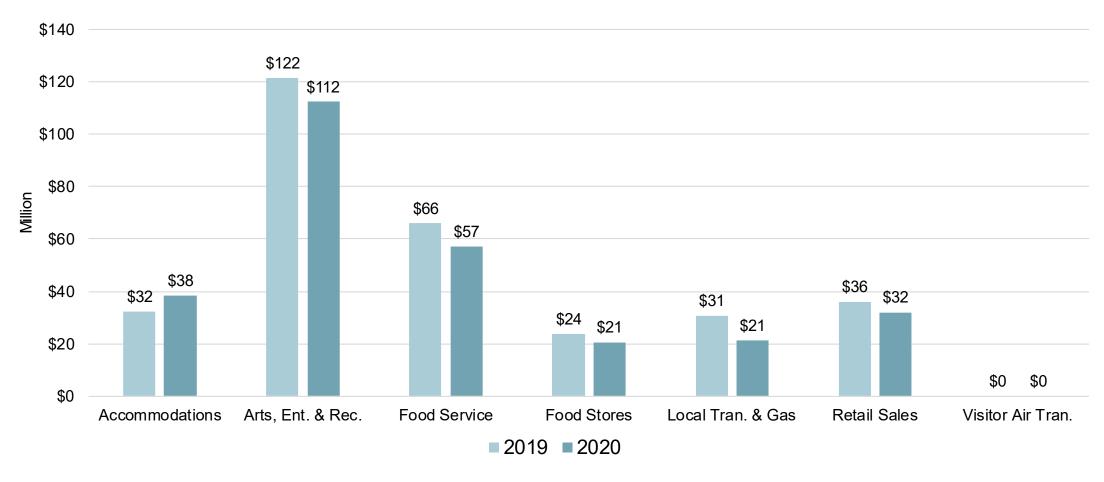








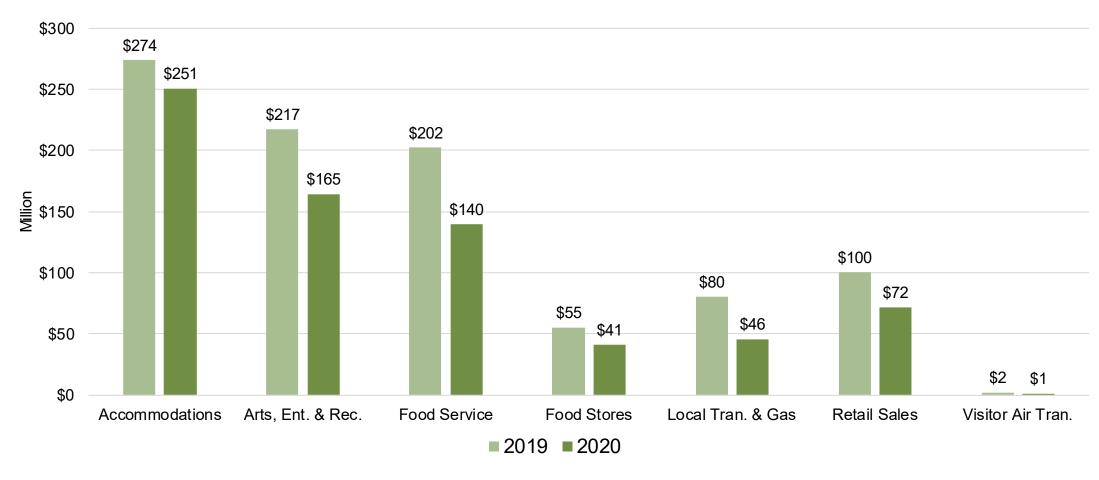
Spending by Commodity Purchased Gila







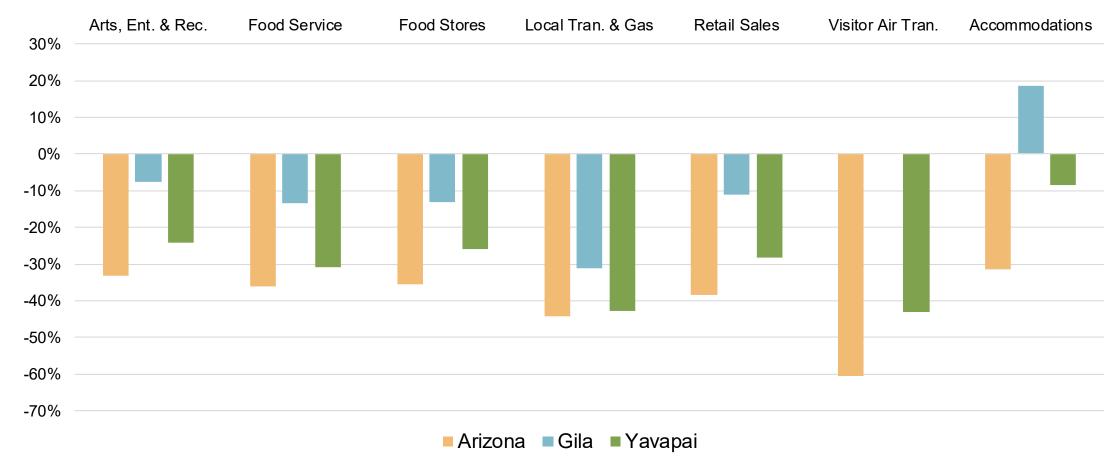
Spending by Commodity Purchased Yavapai







Spending by Commodity Purchased % change







2021 Tourism Indicators To-Date

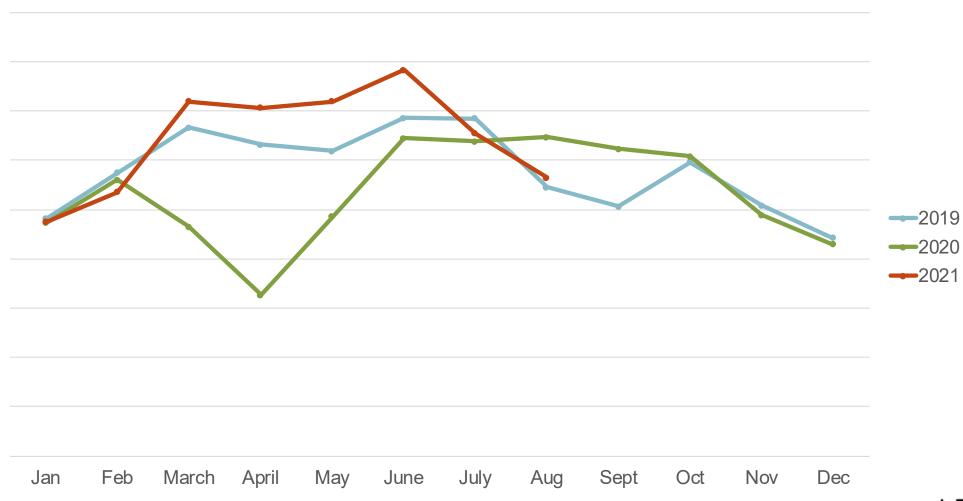
North Central Region

https://tourism.az.gov/data-trends/





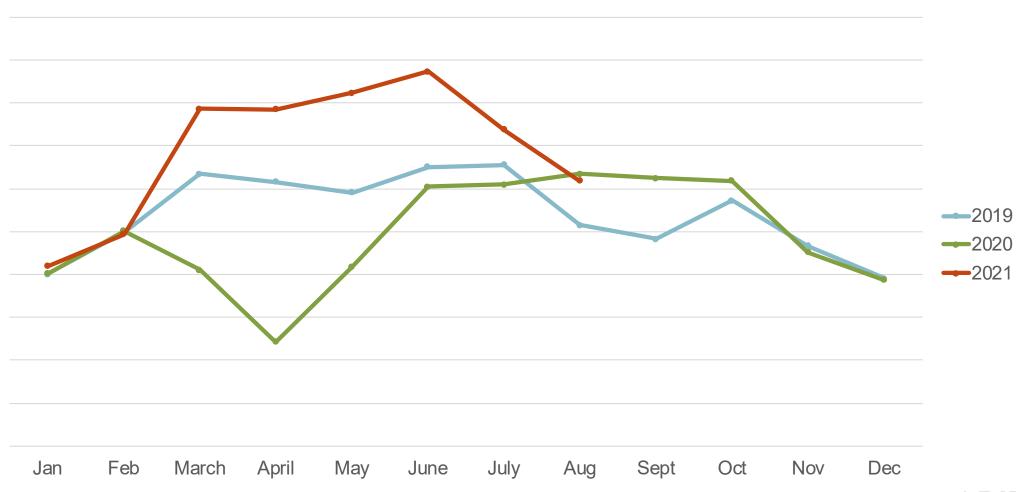
Lodging Occupancy Gila County







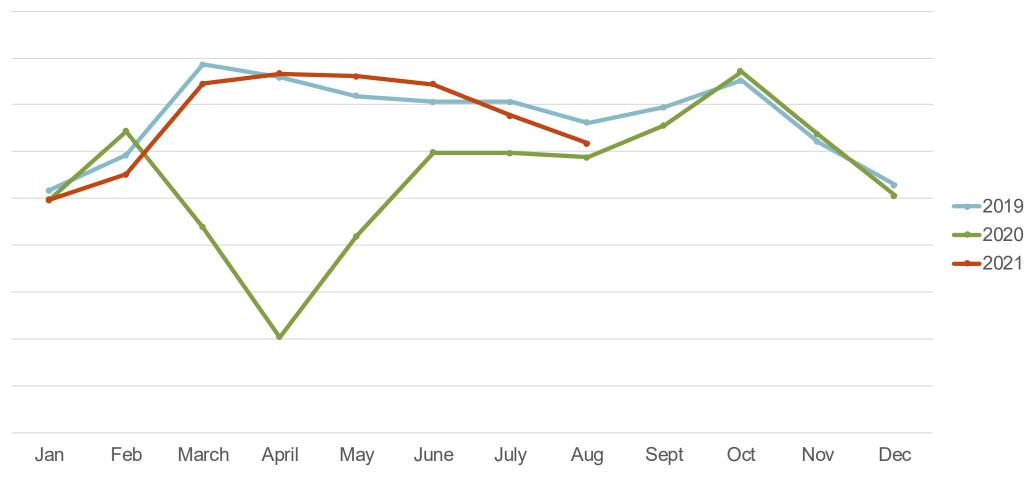
Lodging RevPAR Gila County







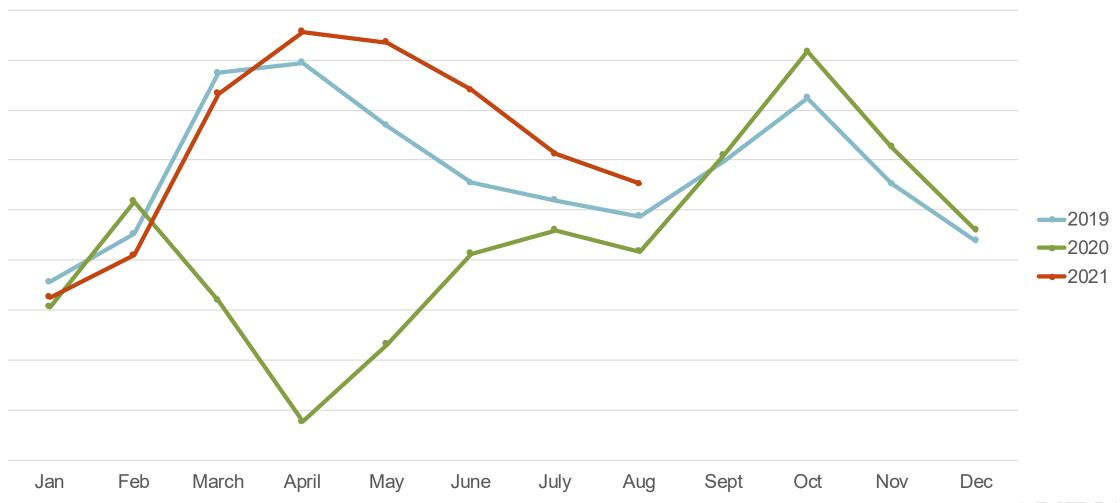
Lodging Occupancy Yavapai County





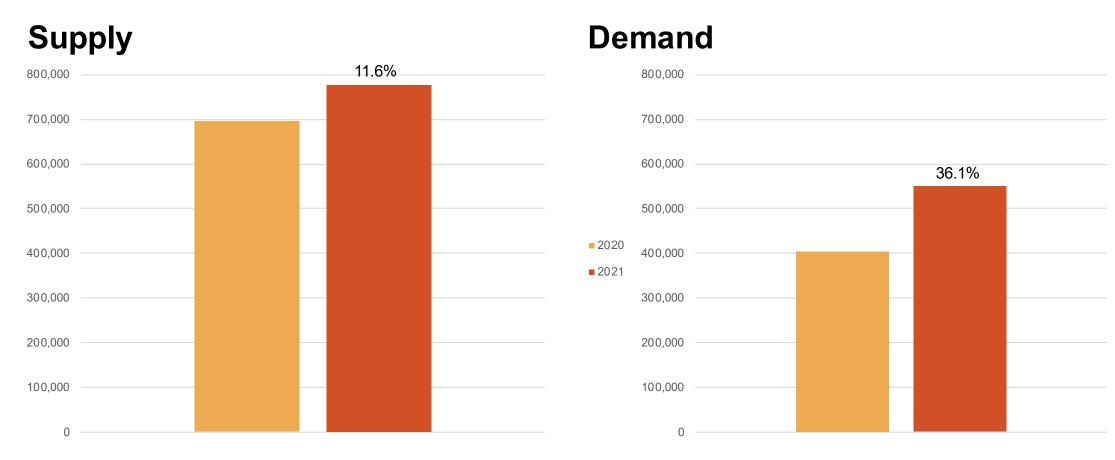


Lodging RevPAR Yavapai County





Airbnb – North Central Region YOY % Change

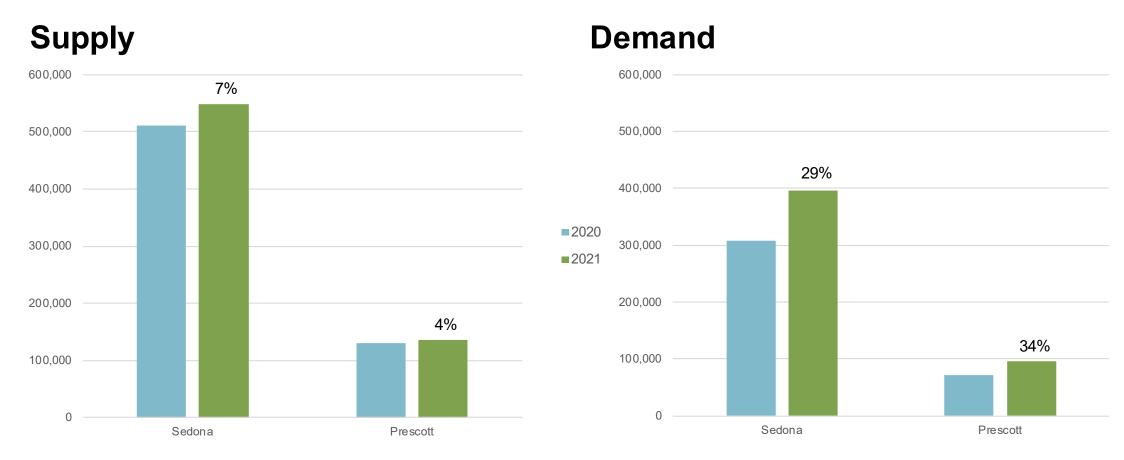


Source: AirDNA

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Airbnb — City Level YOY % Change



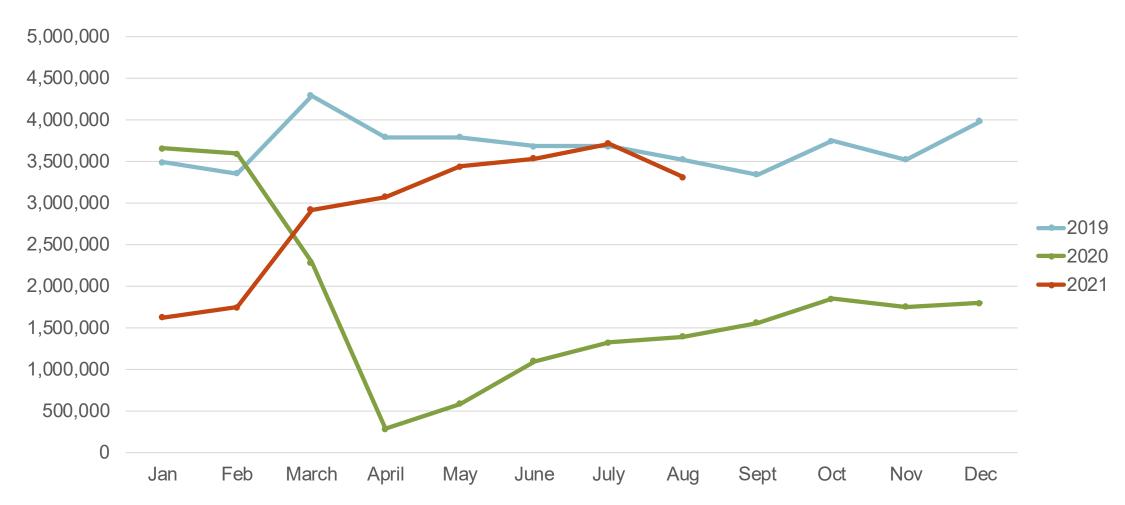
Source: AirDNA





Airport Passenger Traffic

Phoenix Sky Harbor - Domestic



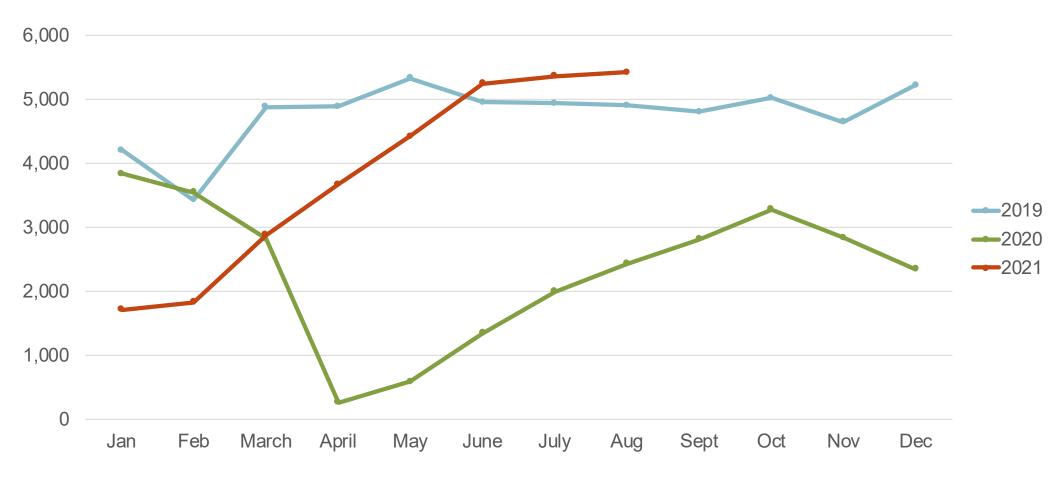
Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports





Airport Passenger Traffic

North Central Region



Includes: Prescott Regional Airport

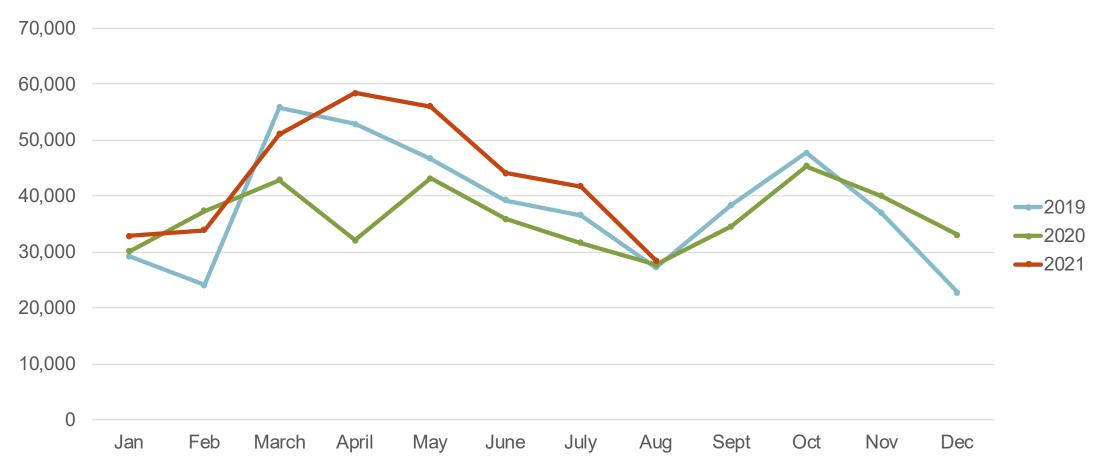
Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports





State Park Visitation

North Central Region



Includes: Dead Horse Ranch, Fort Verde, Granite Mountain Hotshots, Jerome, Red Rock, and Tonto Natural Bridge State Parks

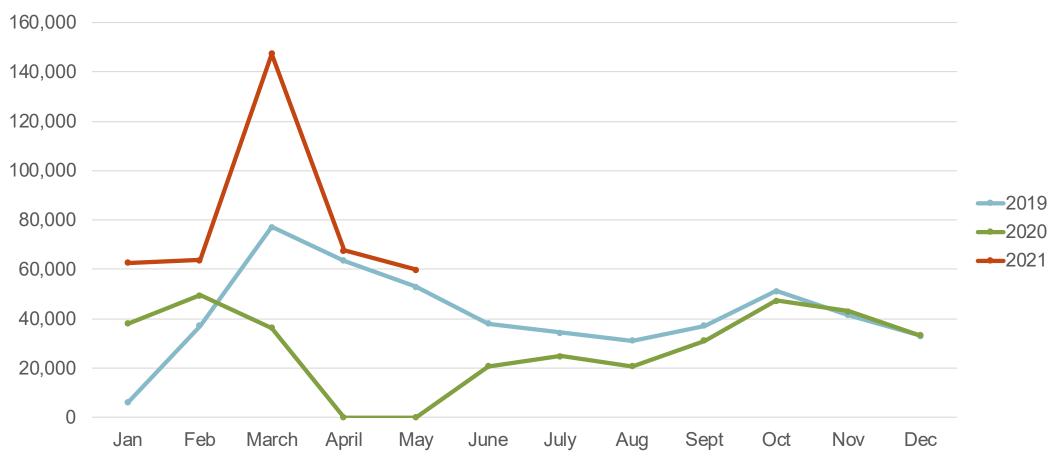
Source: State Park Visitation, Northern Arizona University, Arizona State Parks





National Park Visitation

North Central Region



Includes: Montezuma Castle, Tonto, and Tuzigoot National Monuments

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Appreciate AZ

Toolkit and Resources





PEOPLE FORM LASTING CONNECTIONS WITH NATURE WHEN THEY UNDERSTAND HOW TO PROTECT IT. HERE ARE THE SEVEN PRINCIPLES OF APPRECIATE AZ ANYONE CAN USE TO TAKE CARE OF THE OUTDOORS.

Nº1 PLAN AHEAD AND PREPARE

There's so much more than just desert in Arizona. Planning ahead and preparing for the state's diverse terrain and temperatures means you'll be able to safely experience all that Arizona has to offer.

Nº2 STICK TO TRAILS

Wander with wonder, but please stick to the trails and camp only on existing or designated campsites. When you minimize your impact, you protect plants, animals and yourself.

Nº3 TRASH YOUR TRASH

Ecosystems are delicate and even organic trash can have a negative impact. So, when it comes to trash and waste, pack it in and pack it out.

№4 LEAVE WHAT YOU FIND

In Arizona, there is so much to discover and history to explore. Take pictures and make memories, but please don't take mementos or leave a mark.

Q5 BE CAREFUL WITH FIRE

Minimize fire impacts by using only designated fire pits and keeping your campfire small, safe and attended. Arizona's hot, dry climate is perfect to catch a blaze, making this principle ever so important.

Nº6 RESPECT WILDLIFE

Arizona's great outdoors is home to more than 800 species of wildlife. It's best to observe them from a distance, so be prepared to stop and let the wildlife stay wild.

97 SHARE THE OUTDOORS

Arizona's landscapes provide the perfect backdrop for reflection. Respect others and their unique connection to the land. Let's all enjoy the natural world together.

Visit AppreciateAZ.com for tips on traveling sustainably in Arizona.

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Brochure

Posters

Social Media Assets

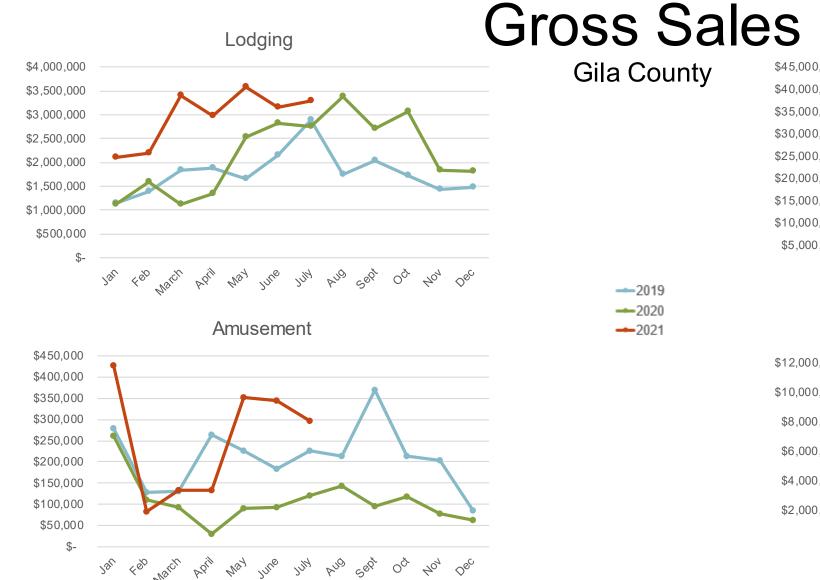
Talking Points

Digital Courses

https://tourism.az.gov/leavenotrace/







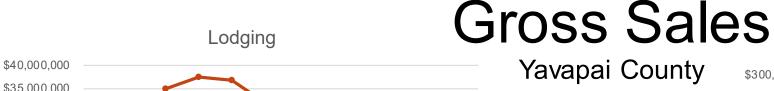
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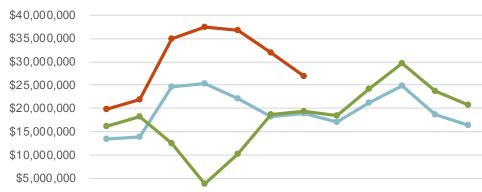




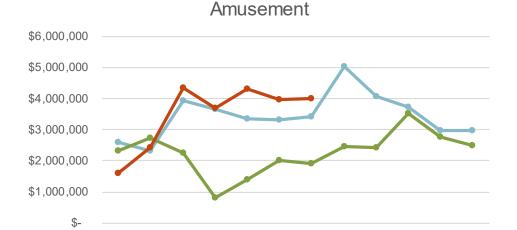


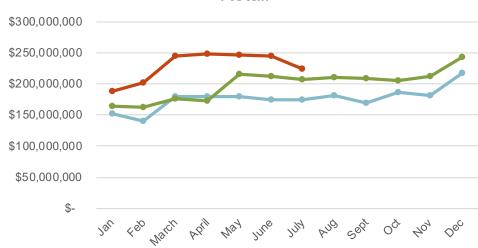












Retail







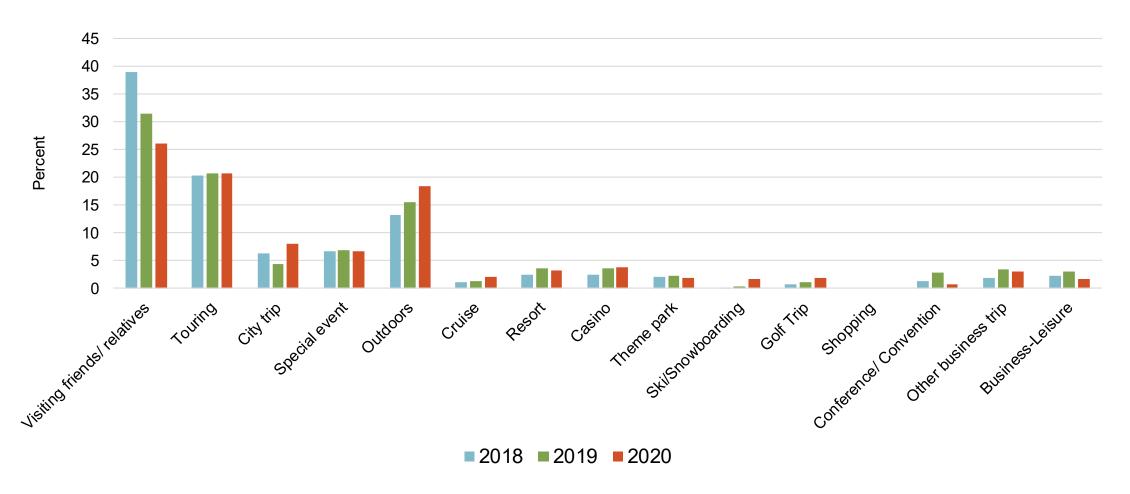
Traveler Behaviors





Main Purpose of Trip Trend

North Central Region

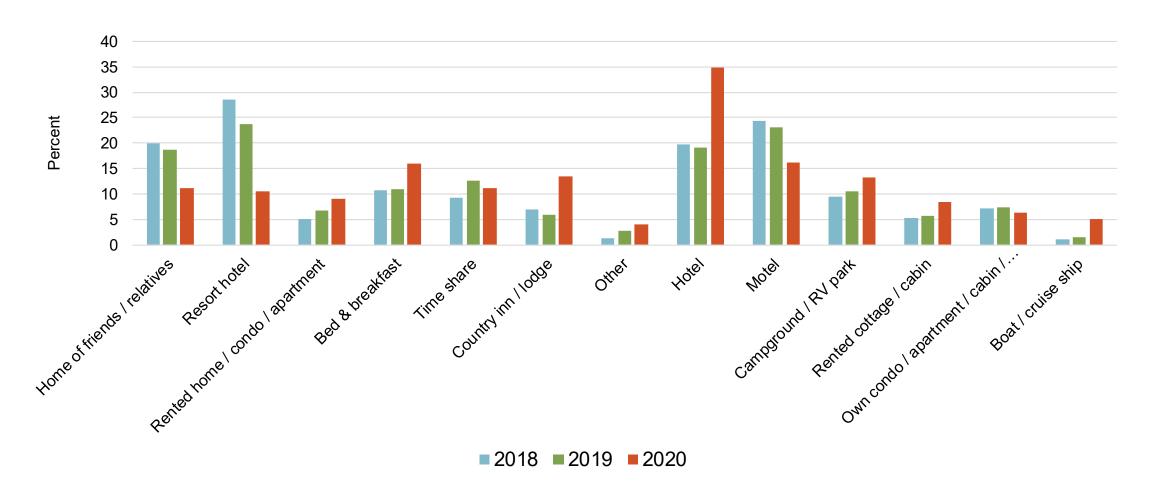






Accommodation Choice Trend

North Central Region







Top Origin Markets North Central Region

DMA	Percent of Trips in 2018	
Phoenix, AZ	21	
Los Angeles, CA	10	
Tucson (Nogales), AZ	6	
New York, NY	5	
Chicago, IL	3	
Denver, CO	3	
San Francisco-Oakland-San Jose, CA	2	
San Diego, CA	2	
Sacramento-Stockton-Modesto, CA	2	
Washington, DC	2	

DMA	Percent of Trips in 2019
Phoenix, AZ	31
New York, NY	5
Los Angeles, CA	5
Chicago, IL	4
Tucson (Nogales), AZ	3
Houston, TX	2
Washington, DC	2
Seattle-Tacoma, WA	2
Fresno-Visalia, CA	2
San Diego, CA	2

DMA	Percent of Trips in 2020
Phoenix, AZ	27
Los Angeles, CA	9
New York, NY	6
Tucson (Nogales), AZ	3
Dallas-Ft. Worth, TX	3
Seattle-Tacoma, WA	2
Salt Lake City, ID/UT	2
Chicago, IL	2
Atlanta, GA	2
Washington, DC	1

Source: Longwoods International

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Chicago, IL	2
Atlanta, GA	2
Washington, DC	1

Source: Longwoods International

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Top Origin Markets 2021

DMA	Percent of Trips in Q1 2021
Phoenix, AZ	22
Los Angeles, CA	8
New York, NY	7
Chicago, IL	4
Philadelphia, PA	3
Miami-Ft. Lauderdale, FL	3
Denver, CO	3
Lincoln & Hstngs-Kearney Plus, NE	2
Albuquerque-Santa Fe, NM	2
Tucson (Nogales), AZ	2

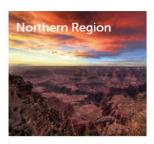
DMA	Percent of Trips in Q2 2021
Phoenix, AZ	25
New York, NY	8
Los Angeles, CA	7
Tucson (Nogales), AZ	3
Atlanta, GA	2
Washington, DC	2
Houston, TX	2
Lincoln & Hstngs-Kearney Plus, NE	2
Spokane, ID/WA	2
San Francisco-Oakland-San Jose, CA	2





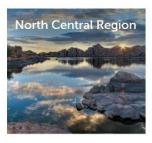
2020 Visitor profile











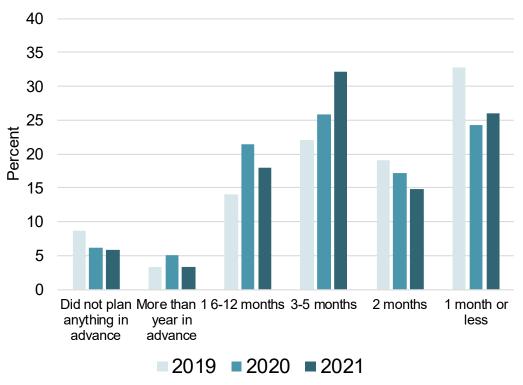




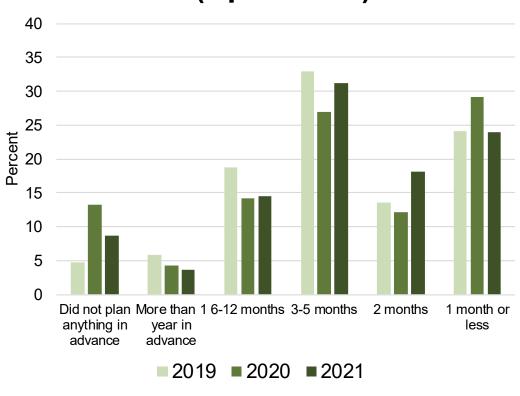


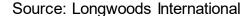
Trip Planning Window North Central Region





Q2 (April-June)



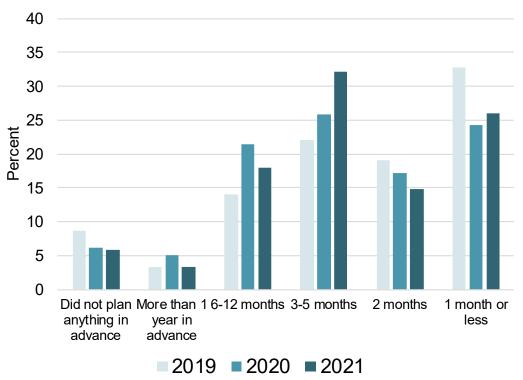




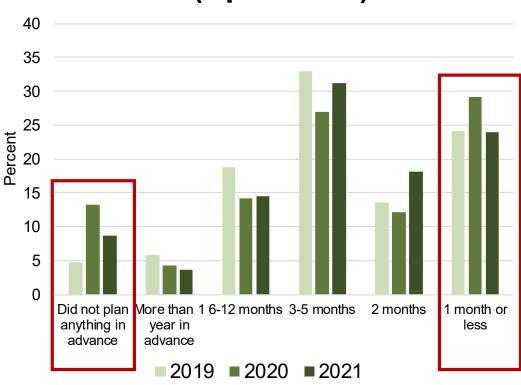


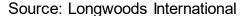
Trip Planning Window North Central Region





Q2 (April-June)

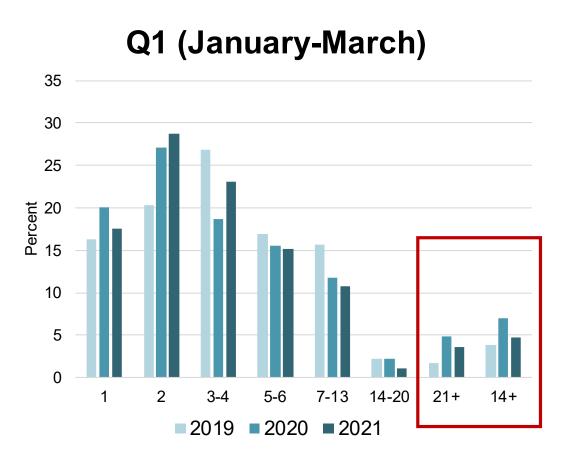


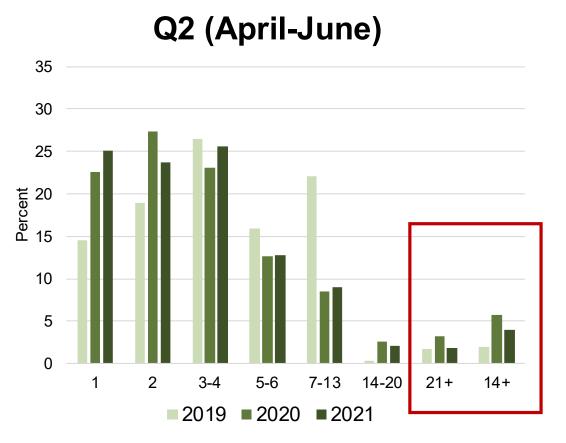






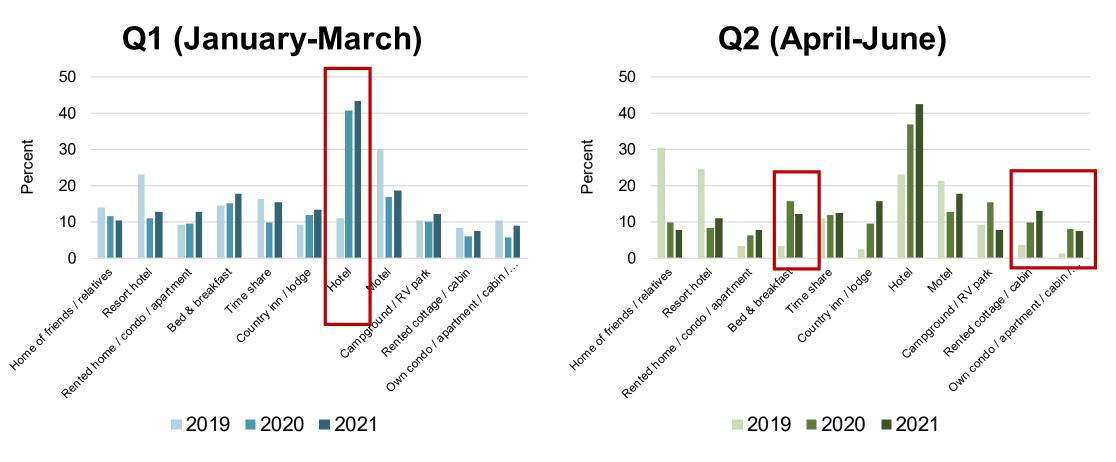
Total Nights Away North Central Region







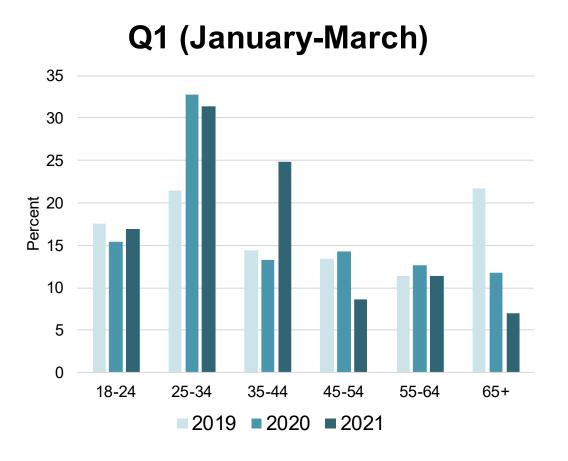
Accommodations North Central Region

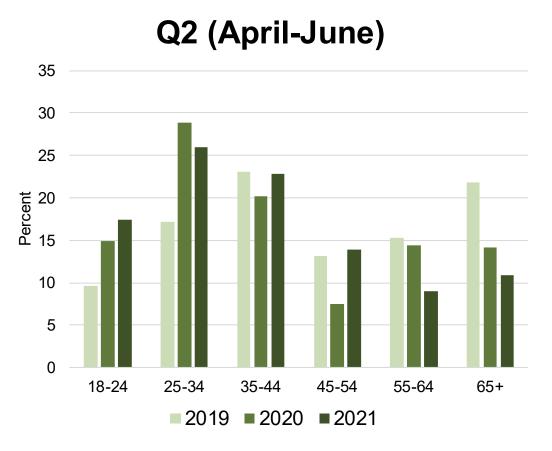






Age of Visitor North Central Region







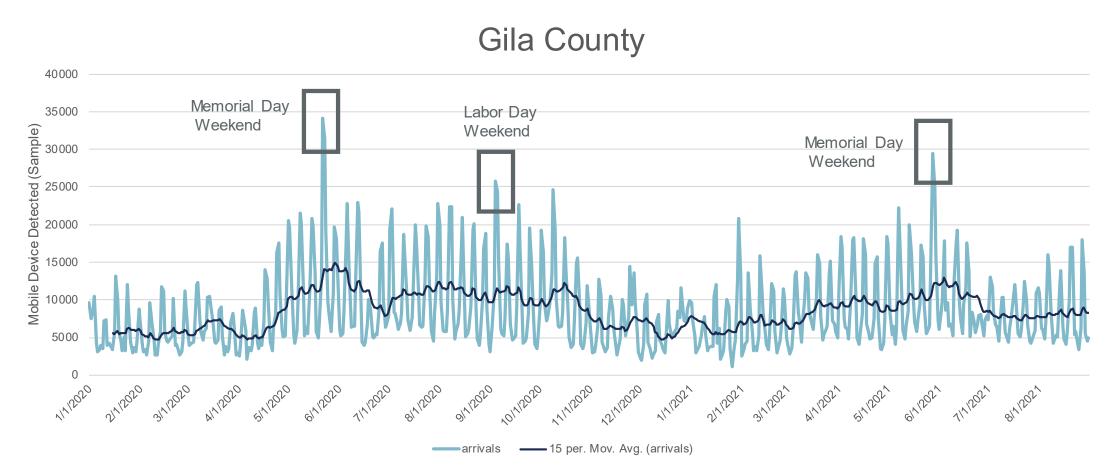


Arrivalist Gila County





Trips by Arrival County Over Time







Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 - 8/31/21

Gila County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	36.6%	17%	2 Days, 12 Hours, 16 Minutes
Los Angeles	7.2%	18%	2 Days, 11 Hours, 38 Minutes
Tucson/Sierra Vista	7.1%	14%	3 Days, 2 Hours, 21 Minutes
Albuquerque/Santa Fe	4.4%	15%	3 Days, 8 Hours, 9 Minutes
Denver	3.2%	8%	4 Days, 7 Hours, 7 Minutes
Sacramento/Stockton/Modesto	2.3%	8%	1 Day, 23 Hours, 14 Minutes
Seattle/Tacoma	2.1%	6%	4 Days, 9 Hours, 49 Minutes
Salt Lake City	1.8%	7%	3 Days, 15 Hours, 35 Minutes
Minneapolis/Saint Paul	1.7%	2%	5 Days, 1 Hour, 6 Minutes
Chicago	1.6%	3%	4 Days, 14 Hours, 58 Minutes

Source: Arrivalist





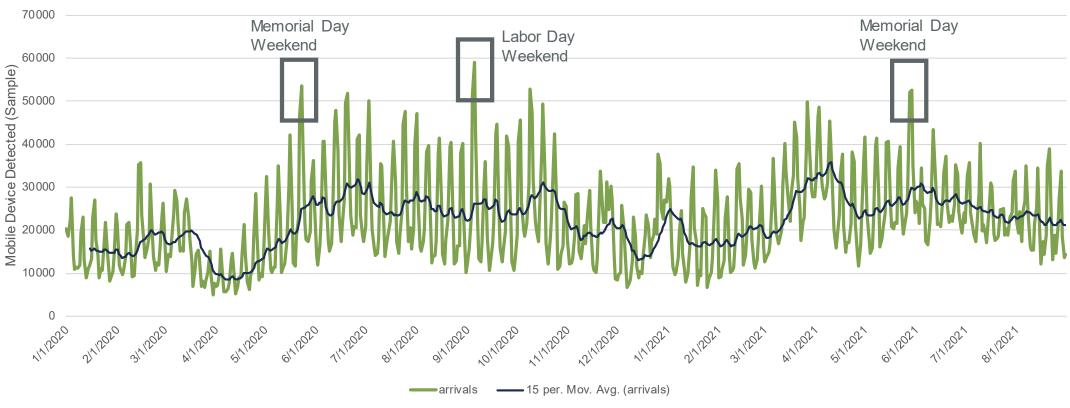
Arrivalist Yavapai County





Trips by Arrival County Over Time









Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Yavapai County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	40.9%	42%	2 Days, 1 Hour, 43 Minutes
Los Angeles	10.0%	20%	3 Days, 2 Hours, 47 Minutes
Tucson/Sierra Vista	4.7%	28%	2 Days, 15 Hours, 9 Minutes
San Diego	4.6%	26%	3 Days, 6 Hours, 32 Minutes
Salt Lake City	3.5%	24%	2 Days, 19 Hours, 54 Minutes
Las Vegas	2.0%	22%	2 Days, 10 Hours, 25 Minutes
Albuquerque/Santa Fe	2.0%	31%	2 Days, 18 Hours, 9 Minutes
Chicago	1.6%	5%	4 Days, 20 Hours, 25 Minutes
Denver	1.4%	7%	3 Days, 22 Hours, 19 Minutes
San Francisco/Oakland/San Jose	1.4%	9%	3 Days, 16 Hours, 1 Minute

Source: Arrivalist







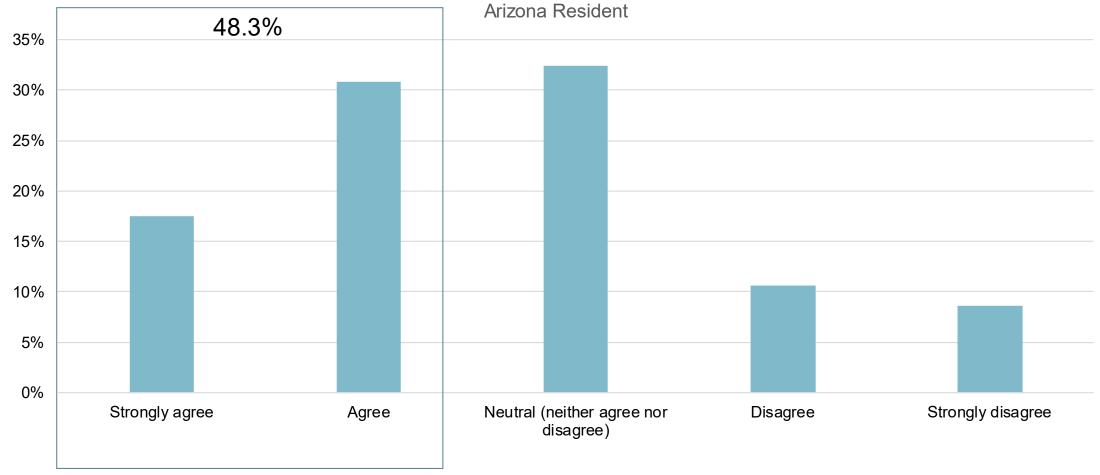


- Domestic American travelers
- Filtered for Arizona Residents
- July September 2021
- 253 responses





I do not want travelers coming to visit my community right now.



Source: Destination Analysts



Arizona-Oriented Travelers

- Domestic American travelers
- March 2020 September 2021
- 300-400 responses per wave

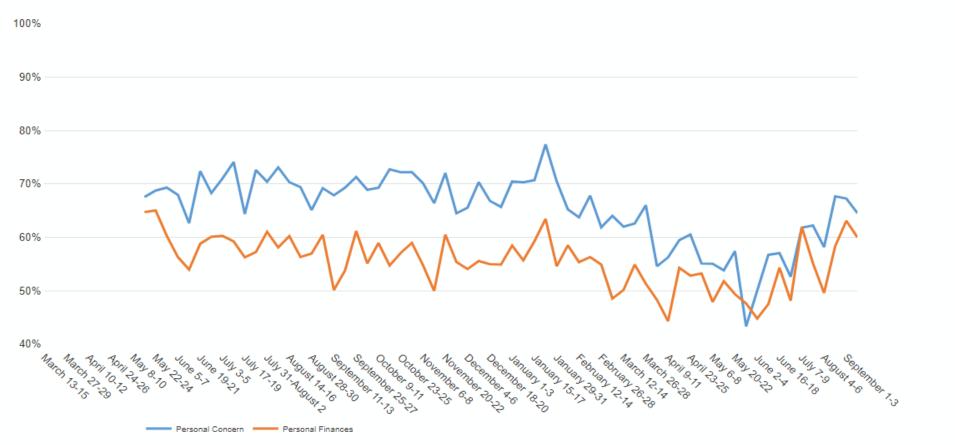
- Filtered for Arizona-Orientated which includes:
 - Visited Arizona (last 3 years)
 - Likely to Visit Arizona (next 3 years)





Thinking about the current coronavirus situation, how concerned are you about...

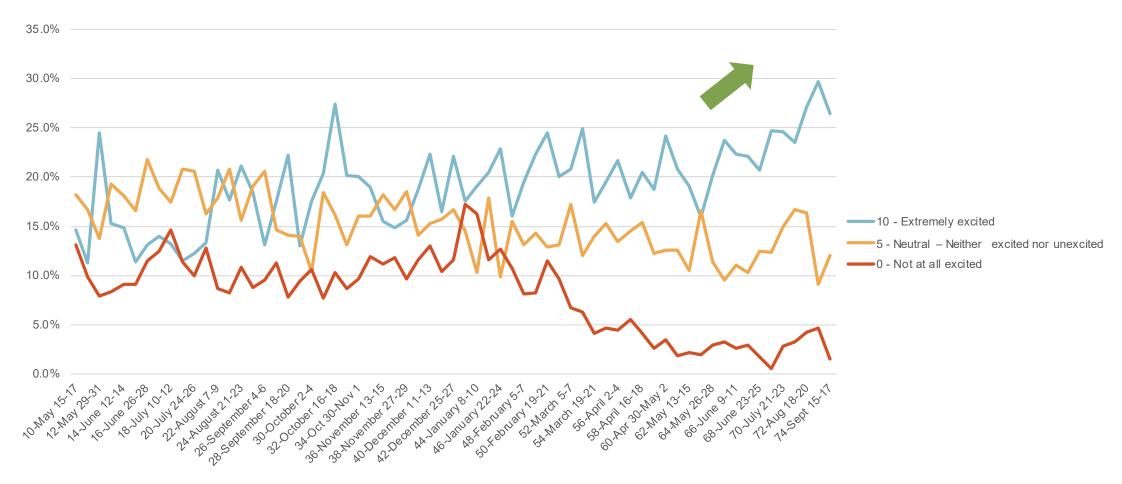
Concern - Time Series







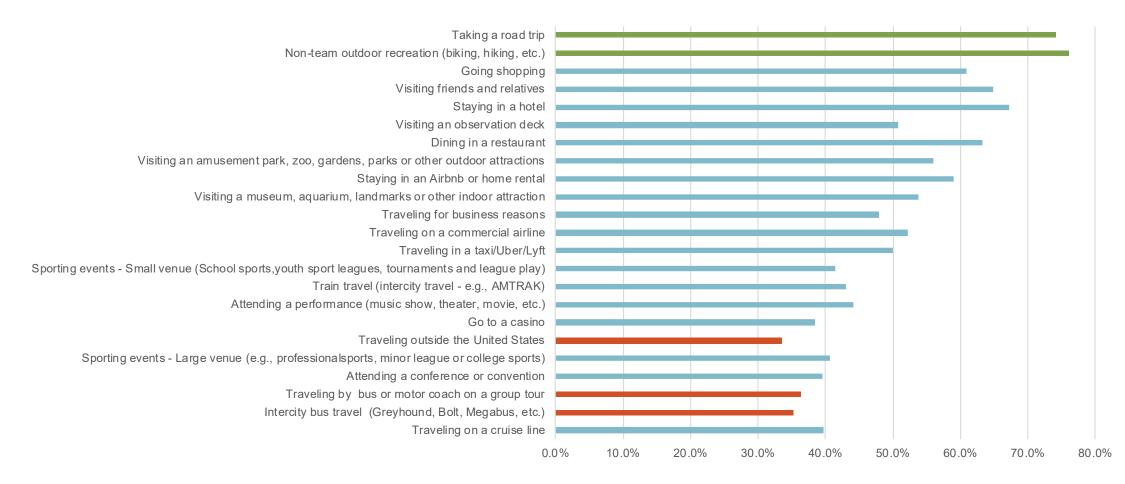
Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go?







At this moment, how safe would you feel doing each type of travel activity?







How Americans Feel About Travel

May – July 2020



July – September 2021



Source: Destination Analysts

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)

AOT Research Team:

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- Lena Allen, <u>lallen@tourism.az.gov</u>



