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
Arizona Tourism in 2020

32.1 million Overnight Visitors

$15 billion Travel Spending

-31%

-41%
Domestic Overnight Visitation
Arizona

Source: Tourism Economics, 2020
International Visitation to Arizona
YOY % Change (2020 v. 2019)

Declines in 2020 international visitation to Arizona

Source: Tourism Economics, updated 10/1/2021
Travel Spending Trend
Arizona

Source: Dean Runyan Associates, 10/14/21, PRELIMINARY
Domestic Overnight Visitation to Arizona
% Change compared to 2019

Source: Tourism Economics
Domestic Overnight Visitation to Arizona
% Change compared to 2019

Source: Tourism Economics

Leisure

- Q1: -10% to -15%
- Q2: -45%
- Q3: -19%
- Q4: -16%

Source: Tourism Economics
Domestic Overnight Visitation to Arizona

% Change compared to 2019

Source: Tourism Economics

Resident

Q1: -7%, -12%
Q2: -34%
Q3: -17%
Q4: -13%

2020 2021
2020 Visitor Spending
($ Millions and YOY % Change)

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p
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
-13.5%

Employment*
-160 jobs
-5.2%

Earnings*
-$700,000
-0.9%

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020

*Employment and Earnings include CARES Act support
## 2020 Travel Impacts
(YOY Difference and % Change)

### Yavapai County

<table>
<thead>
<tr>
<th>Category</th>
<th>Direct Travel Spending</th>
<th>Local Tax Receipts</th>
<th>Employment*</th>
<th>Food Service Spending</th>
<th>Earnings*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-$249 Million, -24.9%</td>
<td>-$8.9 Million, -18.0%</td>
<td>-1,670 jobs, -16.2%</td>
<td>-$62.6 Million, -31.0%</td>
<td>-$26.3 Million, -9.2%</td>
</tr>
<tr>
<td>Accommodations Spending</td>
<td>-$22.9 Million, -8.4%</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p</td>
<td></td>
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</tr>
</tbody>
</table>

*Employment and Earnings include CARES Act support
Spending by Accommodation Choice
Gila County

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
Spending by Accommodation Choice
Yavapai County

2019
- Vacation Home: 3%
- Private Home: 11%
- Day Travel: 32%
- Campground: 2%
- Hotel, Motel, STVR: 52%

2020
- Vacation Home: 4%
- Private Home: 7%
- Day Travel: 34%
- Campground: 2%
- Hotel, Motel, STVR: 53%

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p
Spending by Accommodation Choice
Gila County

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
Spending by Accommodation Choice
Yavapai County

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
Spending by Commodity Purchased
Gila

<table>
<thead>
<tr>
<th>Commodity</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>$32</td>
<td>$38</td>
</tr>
<tr>
<td>Arts, Ent. &amp; Rec.</td>
<td>$122</td>
<td>$112</td>
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<tr>
<td>Food Service</td>
<td>$66</td>
<td>$57</td>
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<tr>
<td>Food Stores</td>
<td>$24</td>
<td>$21</td>
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<tr>
<td>Local Tran. &amp; Gas</td>
<td>$31</td>
<td>$21</td>
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<tr>
<td>Retail Sales</td>
<td>$36</td>
<td>$32</td>
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<tr>
<td>Visitor Air Tran.</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
Spending by Commodity Purchased Yavapai

<table>
<thead>
<tr>
<th>Commodity</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>$274</td>
<td>$251</td>
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<tr>
<td>Arts, Ent. &amp; Rec.</td>
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<td>$165</td>
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<tr>
<td>Food Service</td>
<td>$202</td>
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<td>Food Stores</td>
<td>$55</td>
<td>$41</td>
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<tr>
<td>Local Tran. &amp; Gas</td>
<td>$80</td>
<td>$46</td>
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<tr>
<td>Retail Sales</td>
<td>$100</td>
<td>$72</td>
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<tr>
<td>Visitor Air Tran.</td>
<td>$2</td>
<td>$1</td>
</tr>
</tbody>
</table>

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p
Spending by Commodity Purchased
% change

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
2021 Tourism Indicators To-Date

North Central Region

https://tourism.az.gov/data-trends/
Lodging Occupancy
Gila County

Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.
Lodging RevPAR
Gila County

Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.
Airbnb – North Central Region

YOY % Change

Supply

Demand

Source: AirDNA
Airbnb – City Level
YOY % Change

**Supply**

<table>
<thead>
<tr>
<th>City</th>
<th>2020</th>
<th>2021</th>
<th>YOY % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedona</td>
<td>500k</td>
<td>540k</td>
<td>7%</td>
</tr>
<tr>
<td>Prescott</td>
<td>400k</td>
<td>416k</td>
<td>4%</td>
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**Demand**

<table>
<thead>
<tr>
<th>City</th>
<th>2020</th>
<th>2021</th>
<th>YOY % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedona</td>
<td>300k</td>
<td>400k</td>
<td>29%</td>
</tr>
<tr>
<td>Prescott</td>
<td>200k</td>
<td>250k</td>
<td>34%</td>
</tr>
</tbody>
</table>

Source: AirDNA
Airport Passenger Traffic
Phoenix Sky Harbor - Domestic

Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports
Airport Passenger Traffic
North Central Region

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

Includes: Prescott Regional Airport
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
Appreciate AZ
Toolkit and Resources

Brochure
Posters
Social Media Assets
Talking Points
Digital Courses

https://tourism.az.gov/leavenotrace/
Gross Sales
Gila County

Lodging

Retail

Amusement

Restaurant/Bar

Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue
Gross Sales
Yavapai County

Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue
Traveler Behaviors
Accommodation Choice Trend
North Central Region

Source: Longwoods International
# Top Origin Markets

## North Central Region

<table>
<thead>
<tr>
<th>DMA</th>
<th>Percent of Trips in 2018</th>
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<tbody>
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<td>Phoenix, AZ</td>
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Source: Longwoods International
### Top Origin Markets  
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Source: Longwoods International
# Top Origin Markets 2021

<table>
<thead>
<tr>
<th>DMA</th>
<th>Percent of Trips in Q1 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phoenix, AZ</td>
<td>22</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
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<tr>
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<td>Chicago, IL</td>
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</tr>
<tr>
<td>Philadelphia, PA</td>
<td>3</td>
</tr>
<tr>
<td>Miami-Ft. Lauderdale, FL</td>
<td>3</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>3</td>
</tr>
<tr>
<td>Lincoln &amp; Hstngs-Kearney Plus, NE</td>
<td>2</td>
</tr>
<tr>
<td>Albuquerque-Santa Fe, NM</td>
<td>2</td>
</tr>
<tr>
<td>Tucson (Nogales), AZ</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>DMA</th>
<th>Percent of Trips in Q2 2021</th>
</tr>
</thead>
<tbody>
<tr>
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<td>25</td>
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<td>New York, NY</td>
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<td>Los Angeles, CA</td>
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<tr>
<td>Tucson (Nogales), AZ</td>
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<td>Atlanta, GA</td>
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</tr>
<tr>
<td>Washington, DC</td>
<td>2</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>2</td>
</tr>
<tr>
<td>Lincoln &amp; Hstngs-Kearney Plus, NE</td>
<td>2</td>
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<tr>
<td>Spokane, ID/WA</td>
<td>2</td>
</tr>
<tr>
<td>San Francisco-Oakland-San Jose, CA</td>
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</table>

Source: Longwoods International
2020 Visitor profile

Regional Profiles

The Office of Tourism generates, tracks, and analyzes data about domestic and international travel behavior, economic impact, and industry trends and serves as the research & policy arm of the Arizona Office of Tourism. The information is used by state, local, and national partners, government agencies, and industry partners to develop a better understanding of visitor behavior and develop targeted strategies.

Northern Region

Tucson & Southern Region

West Coast Region

North Central Region

Phoenix & Central Region

https://tourism.az.gov/regional-profiles/
Trip Planning Window
North Central Region

Q1 (January-March)
Q2 (April-June)

Source: Longwoods International
Trip Planning Window
North Central Region

Q1 (January-March)

Q2 (April-June)

Percent

Did not plan anything in advance
More than 1 year in advance
1-6 months
6-12 months
3-5 months
2 months
1 month or less

2019 2020 2021

Source: Longwoods International
Total Nights Away
North Central Region

Q1 (January-March)
Q2 (April-June)

Source: Longwoods International
Age of Visitor
North Central Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Arrivalist
Gila County
Trips by Arrival County Over Time

Gila County

Source: Arrivalist
### Top Origin Markets for Overnight Stays

**Time Period: 1/1/2020 – 8/31/21**

**Gila County**

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

*Source: Arrivalist*
Arrivalist
Yavapai County
Trips by Arrival County Over Time

Yavapai County

Source: Arrivalist
# Top Origin Markets for Overnight Stays

**Time Period:** 1/1/2020 – 8/31/21  
**Yavapai County**

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<tr>
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<td>40.9%</td>
<td>42%</td>
<td>2 Days, 1 Hour, 43 Minutes</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>10.0%</td>
<td>20%</td>
<td>3 Days, 2 Hours, 47 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>4.7%</td>
<td>28%</td>
<td>2 Days, 15 Hours, 9 Minutes</td>
</tr>
<tr>
<td>San Diego</td>
<td>4.6%</td>
<td>26%</td>
<td>3 Days, 6 Hours, 32 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>3.5%</td>
<td>24%</td>
<td>2 Days, 19 Hours, 54 Minutes</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>2.0%</td>
<td>22%</td>
<td>2 Days, 10 Hours, 25 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>2.0%</td>
<td>31%</td>
<td>2 Days, 18 Hours, 9 Minutes</td>
</tr>
<tr>
<td>Chicago</td>
<td>1.6%</td>
<td>5%</td>
<td>4 Days, 20 Hours, 25 Minutes</td>
</tr>
<tr>
<td>Denver</td>
<td>1.4%</td>
<td>7%</td>
<td>3 Days, 22 Hours, 19 Minutes</td>
</tr>
<tr>
<td>San Francisco/Oakland/San Jose</td>
<td>1.4%</td>
<td>9%</td>
<td>3 Days, 16 Hours, 1 Minute</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Resident & Traveler Sentiment
Arizona Residents

- 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

Source: Destination Analysts
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?

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

- Taking a road trip
- Non-team outdoor recreation (biking, hiking, etc.)
- Going shopping
- Visiting friends and relatives
- Staying in a hotel
- Visiting an observation deck
- Dining in a restaurant
- Visiting an amusement park, zoo, gardens, parks or other outdoor attractions
- Staying in an Airbnb or home rental
- Visiting a museum, aquarium, landmarks or other indoor attraction
- Traveling for business reasons
- Traveling on a commercial airline
- Traveling in a taxi/Uber/Lyft
- Sporting events - Small venue (School sports, youth sport leagues, tournaments and league play)
- Train travel (intercity travel - e.g., AMTRAK)
- Attending a performance (music show, theater, movie, etc.)
- Go to a casino
- Traveling outside the United States
- Sporting events - Large venue (e.g., professional sports, minor league or college sports)
- Attending a conference or convention
- Traveling by bus or motor coach on a group tour
- Intercity bus travel (Greyhound, Bolt, Megabus, etc.)
- Traveling on a cruise line

Source: Destination Analysts
How Americans Feel About Travel

May – July 2020

Scared
Unsafe
Unsafe
Concerned
Unsure
Ok
Hesitant
Waiting
Ready
Now
Love
Like
Good
Safe
Nervous
Anxious
Cautious
Excited
Happy
Fine
Good

Source: Destination Analysts

July – September 2021

Safe
Comfortable
Scared
Nervous
Anxious
Ready
Fun
Worried
Confident
Cool
Awesome
Great
Risky
Precautions
Like
Confident
Normal
Like
Good
Best
Nice
Near
Excellent
Awesome
Happy
Safe
Worried
Concerned
Neutral
Uneasy
Depressed

Source: Destination Analysts
Resources

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

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Thank you!