



Travel Research Trends

Northern Region

October 22, 2021



Photo credit: An Pham

Agenda

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

Arizona Tourism in 2020

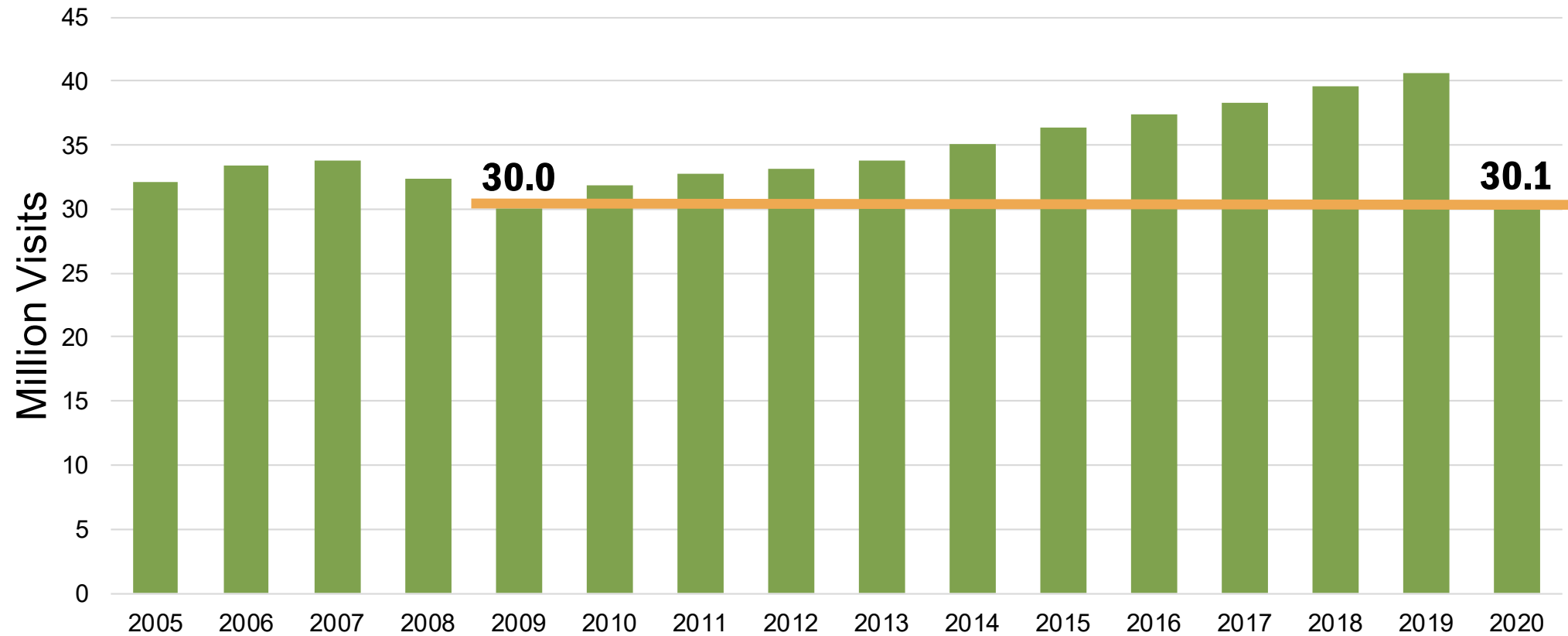
32.1 million
Overnight Visitors

-31%

\$15 billion
Travel Spending

-41%

Domestic Overnight Visitation Arizona

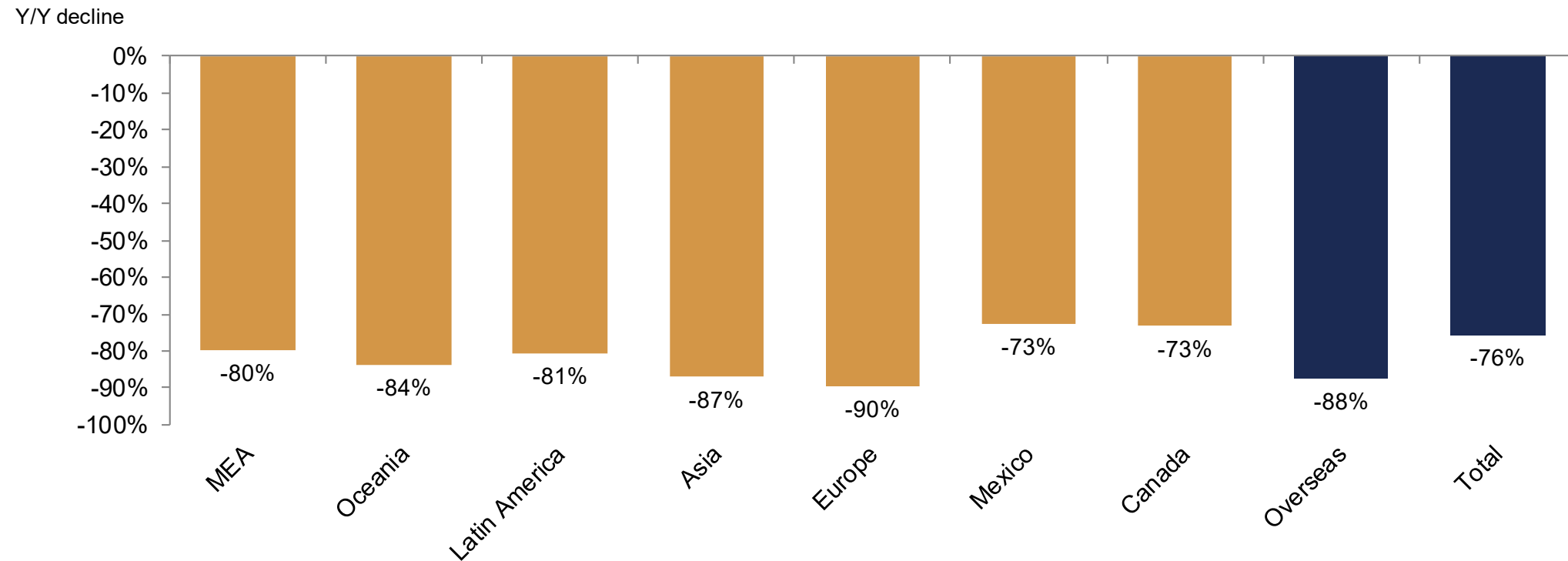


Source: Tourism Economics, 2020

International Visitation to Arizona

YOY % Change (2020 v. 2019)

Declines in 2020 international visitation to Arizona

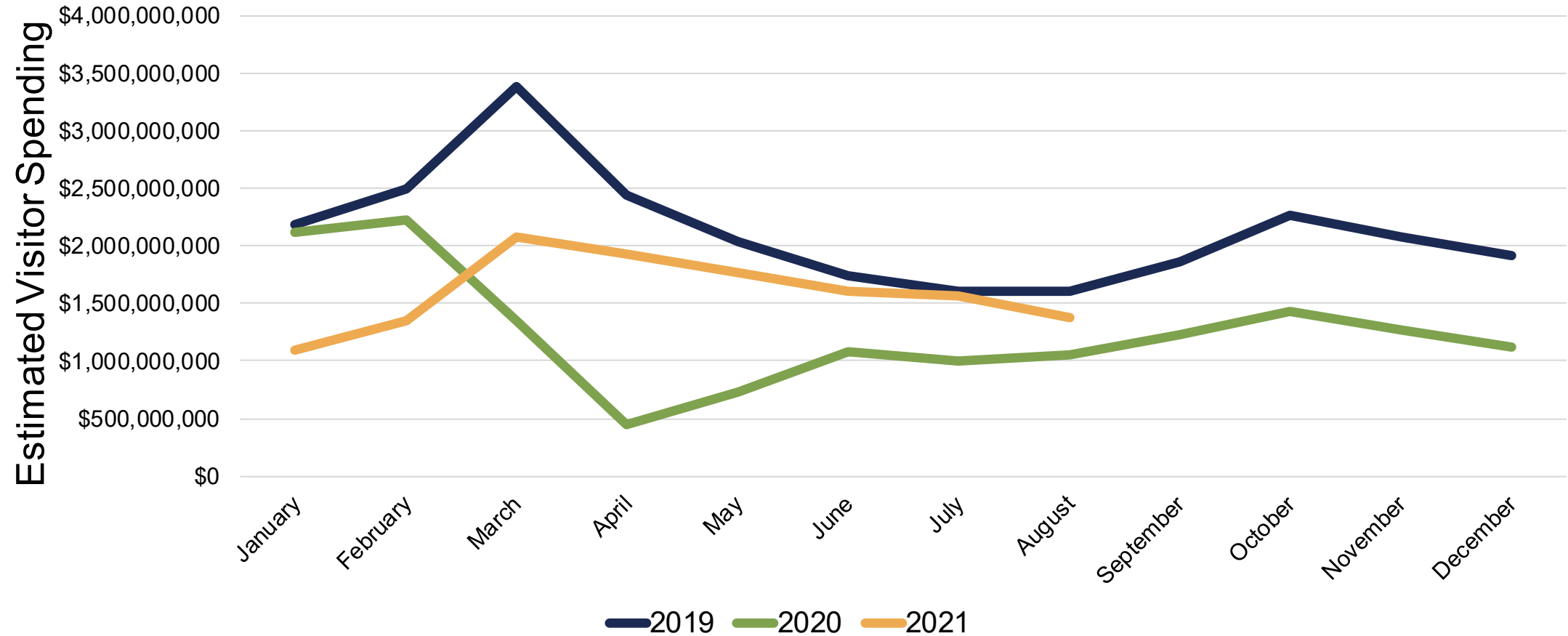


Source: Tourism Economics, updated 10/1/2021



Travel Spending Trend

Arizona

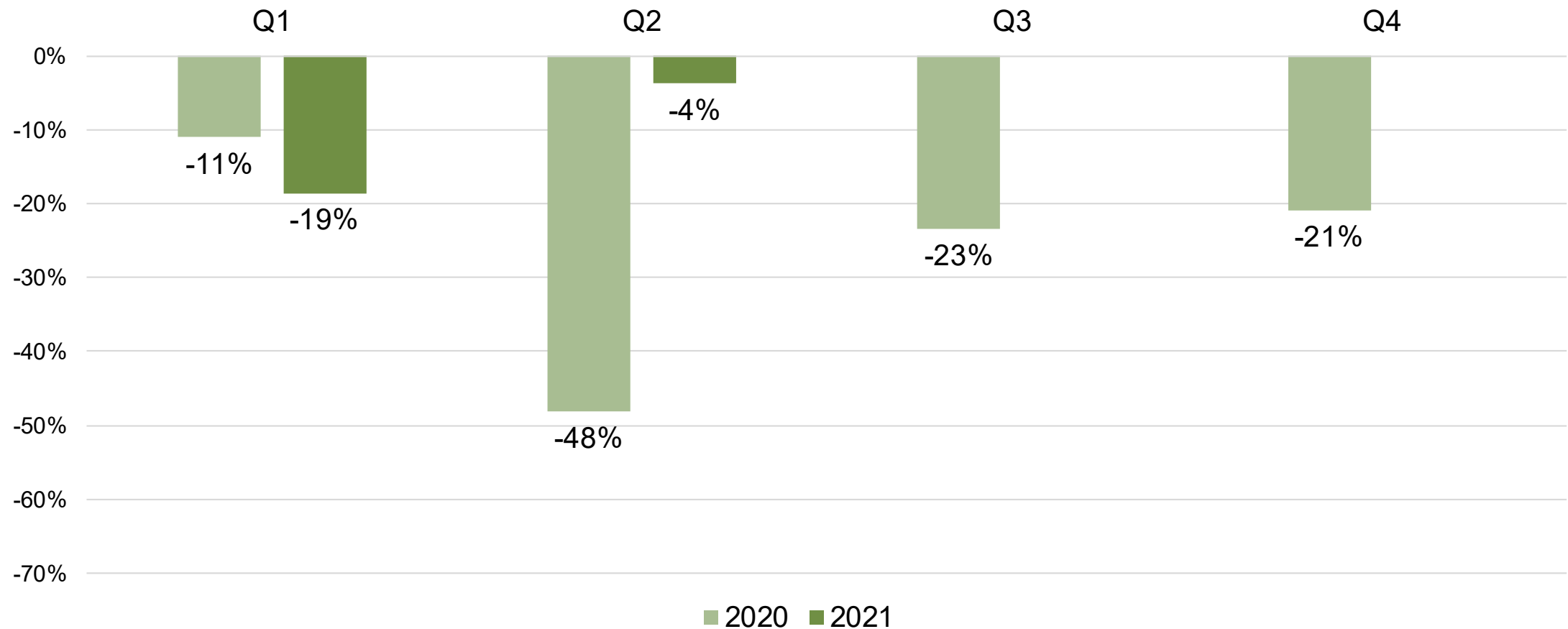


Source: Dean Runyan Associates, 10/14/21, PRELIMINARY



Domestic Overnight Visitation to Arizona

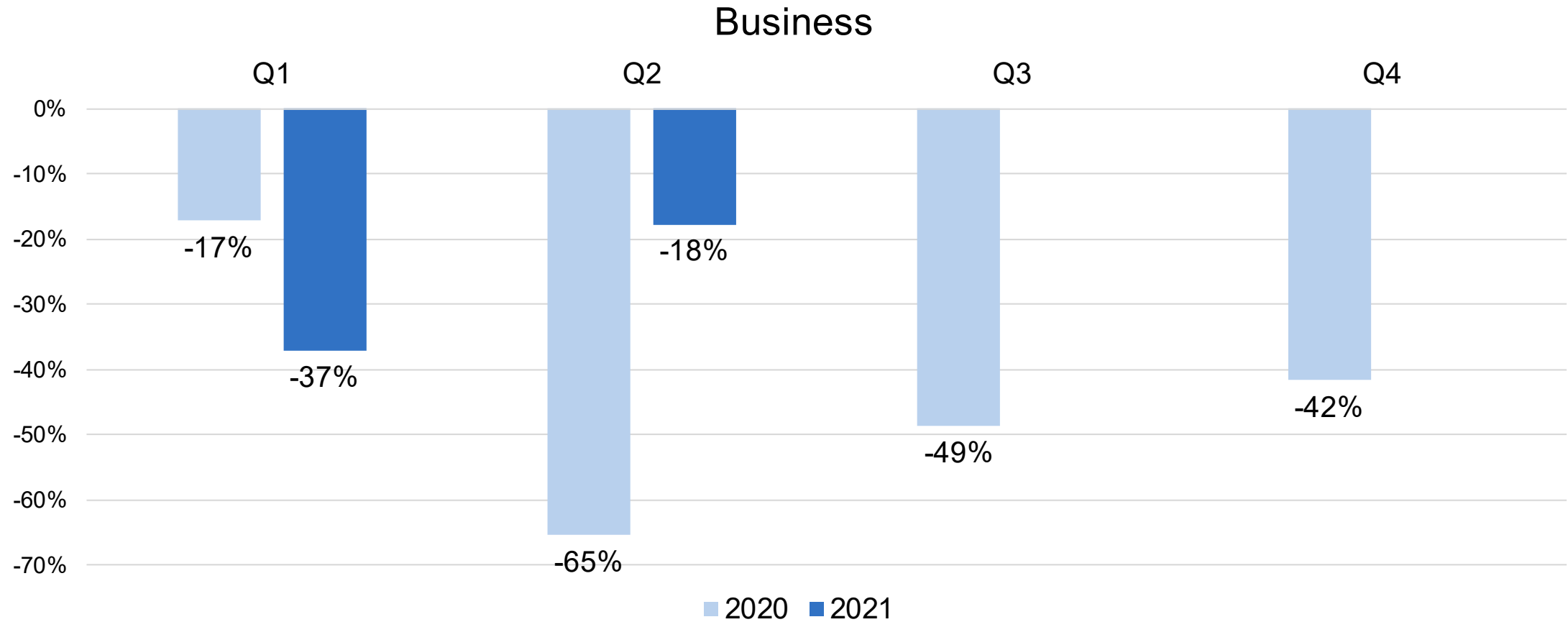
% Change compared to 2019



Source: Tourism Economics

Domestic Overnight Visitation to Arizona

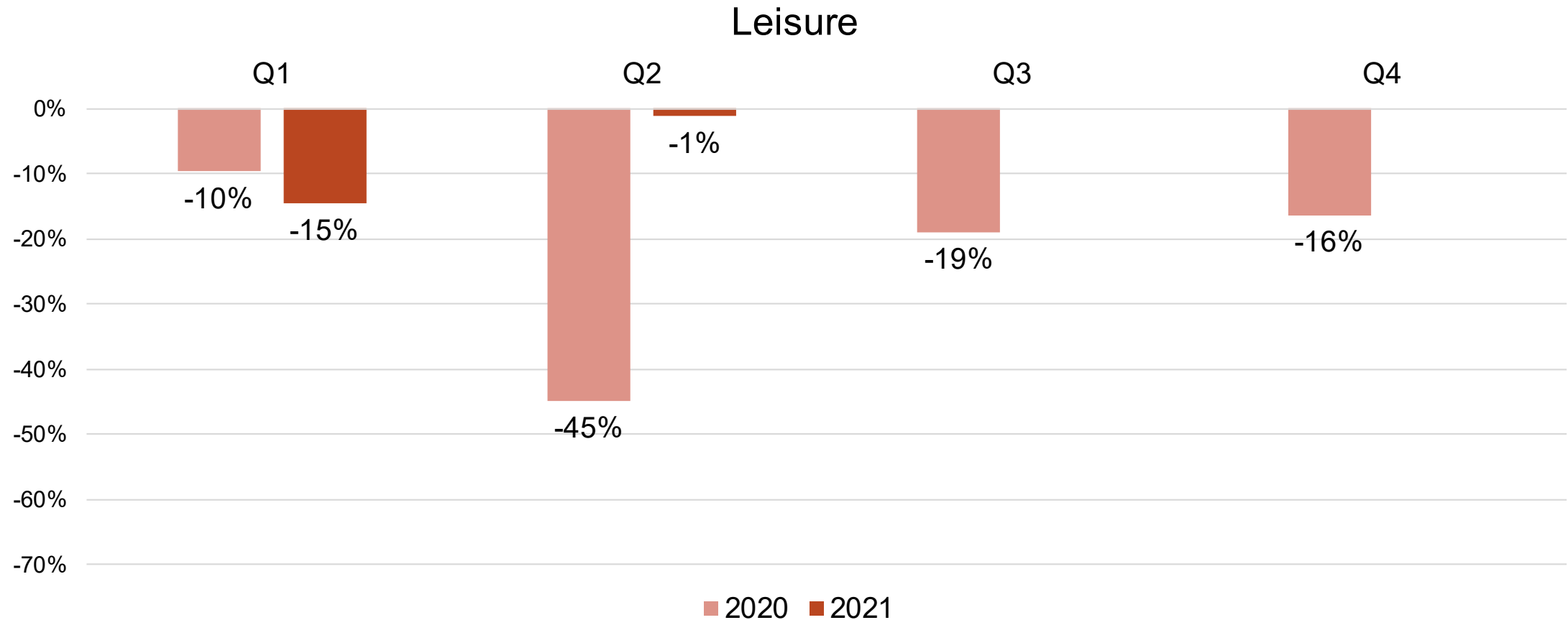
% Change compared to 2019





Domestic Overnight Visitation to Arizona

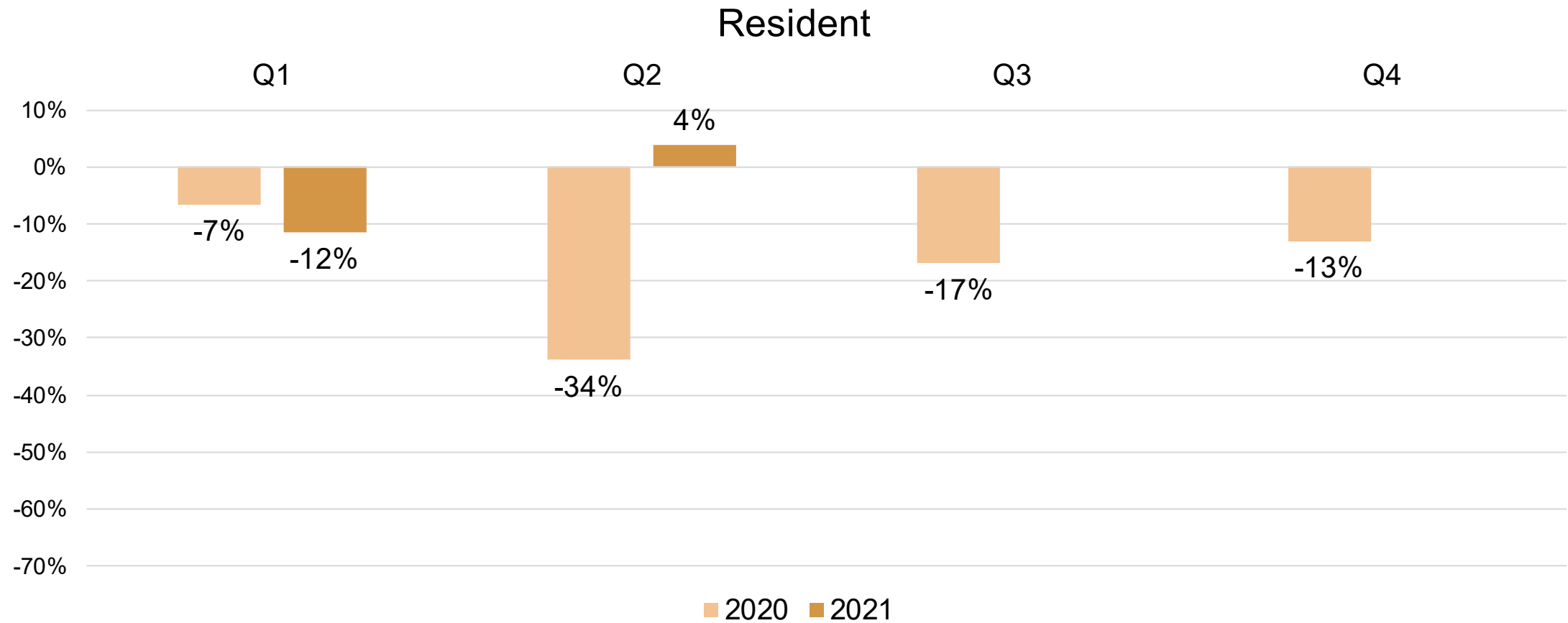
% Change compared to 2019





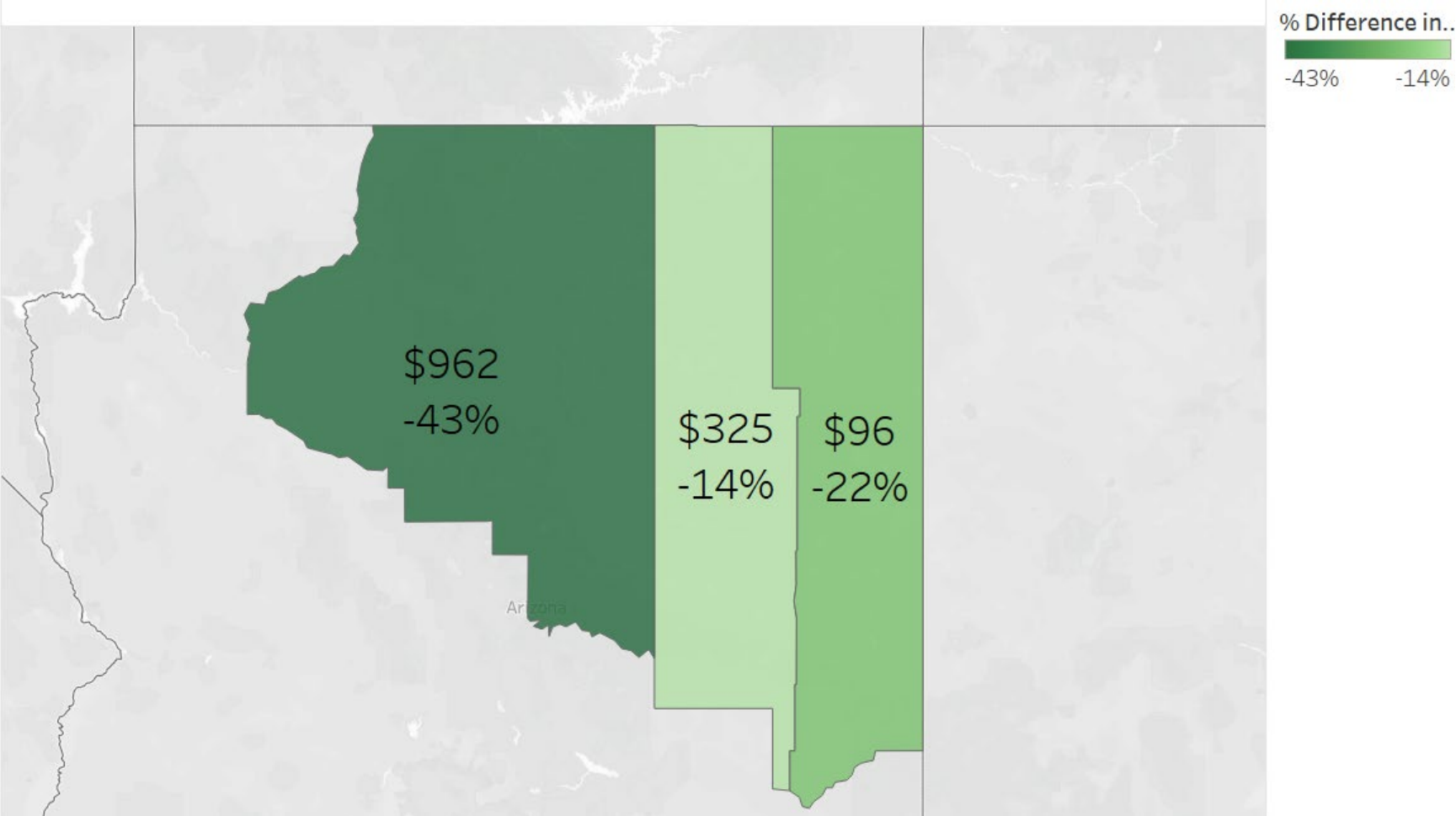
Domestic Overnight Visitation to Arizona

% Change compared to 2019



2020 Visitor Spending

(\$ Millions and YOY % Change)



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

Apache County

Direct Travel Spending

-\$27.4 Million
-22.2%

Local Tax Receipts

-\$866,000
-21%

Employment*

-210 jobs
-13.3%

Accommodations Spending

+\$1 Million
+4.8%

Food Service Spending

-\$7.7 Million
-%

Earnings*

-\$4.6 Million
-11.9%

2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

Coconino County

Direct Travel Spending

-\$735 Million
-43.3%

Local Tax Receipts

-\$29.6 Million
-35.2%

Employment*

-2,430 jobs
-17.6%

Accommodations
Spending

-\$210 Million
-36.4%

Food Service Spending

-\$186 Million
-44.7%

Earnings*

-\$51.5 Million
-11.2%

2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

Navajo County

Direct Travel Spending

-\$51 Million
-13.5%

Local Tax Receipts

-\$1.5 Million
-9.4%

Employment*

-290 jobs
-7.3%

Accommodations Spending

+\$2.1 Million
+2.6%

Food Service Spending

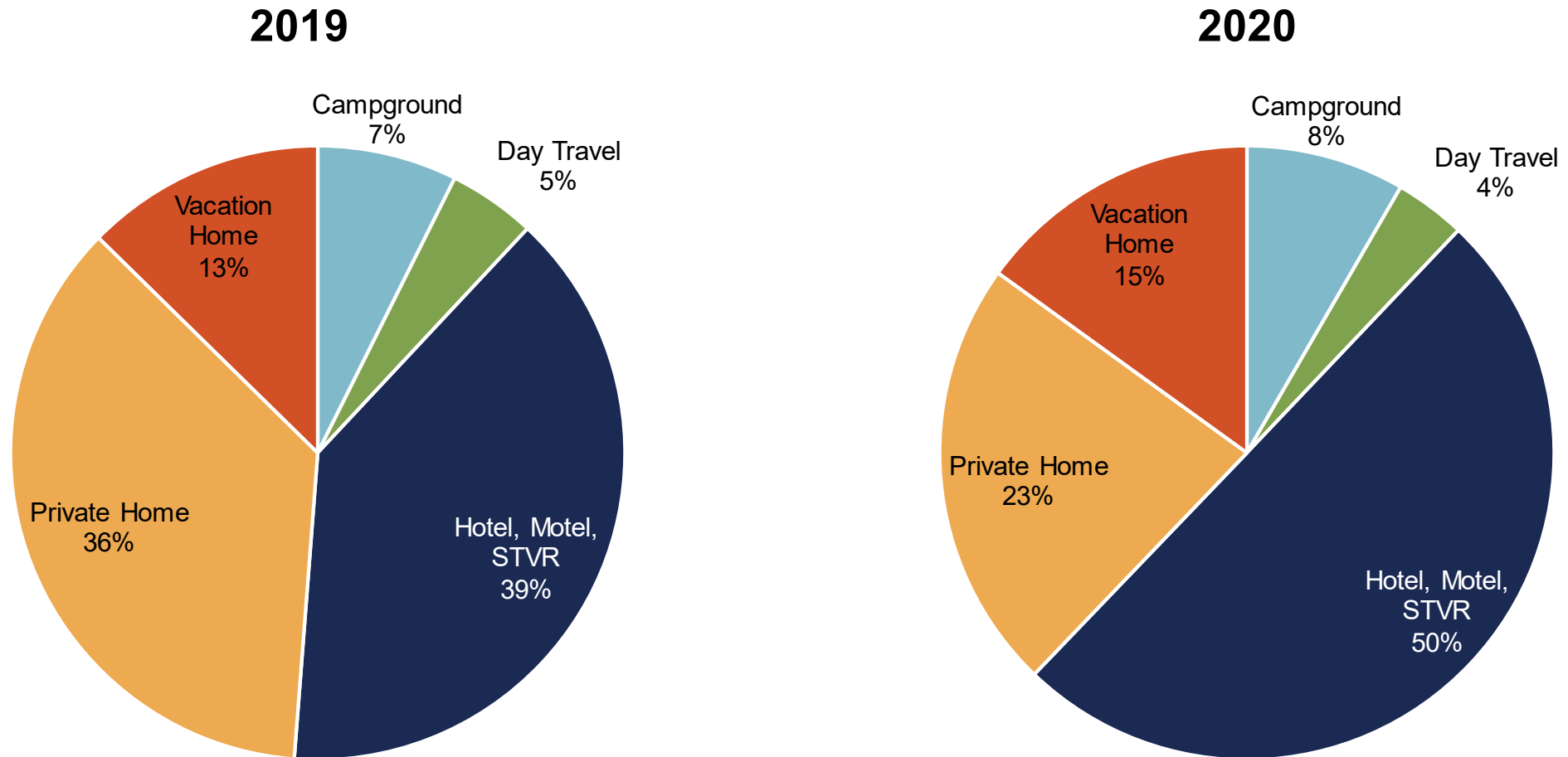
-\$13.4 Million
-12.9%

Earnings*

-\$0.7 Million
-0.7%

% of Spend by Accommodation Choice

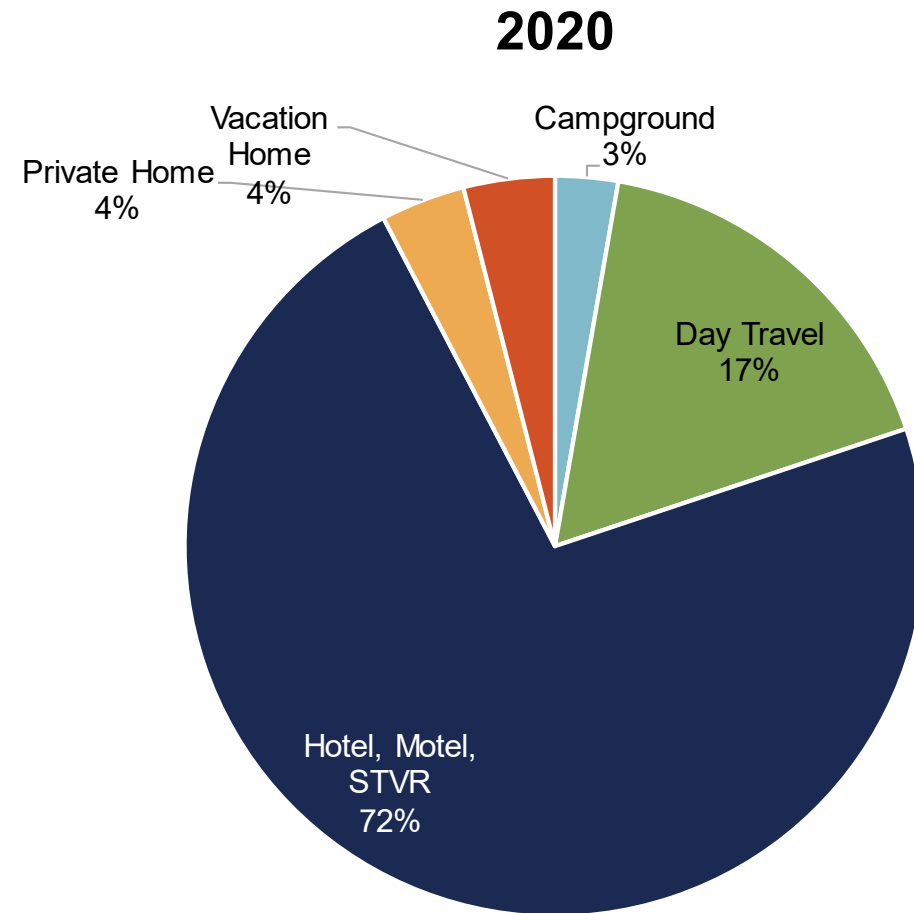
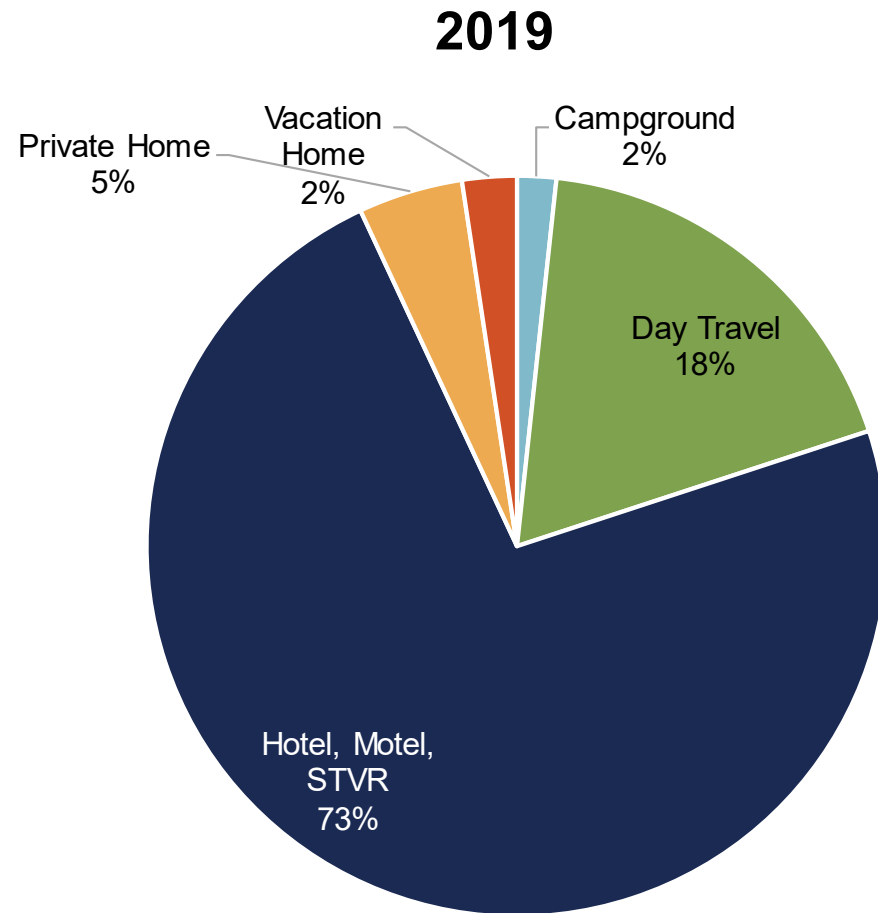
Apache County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

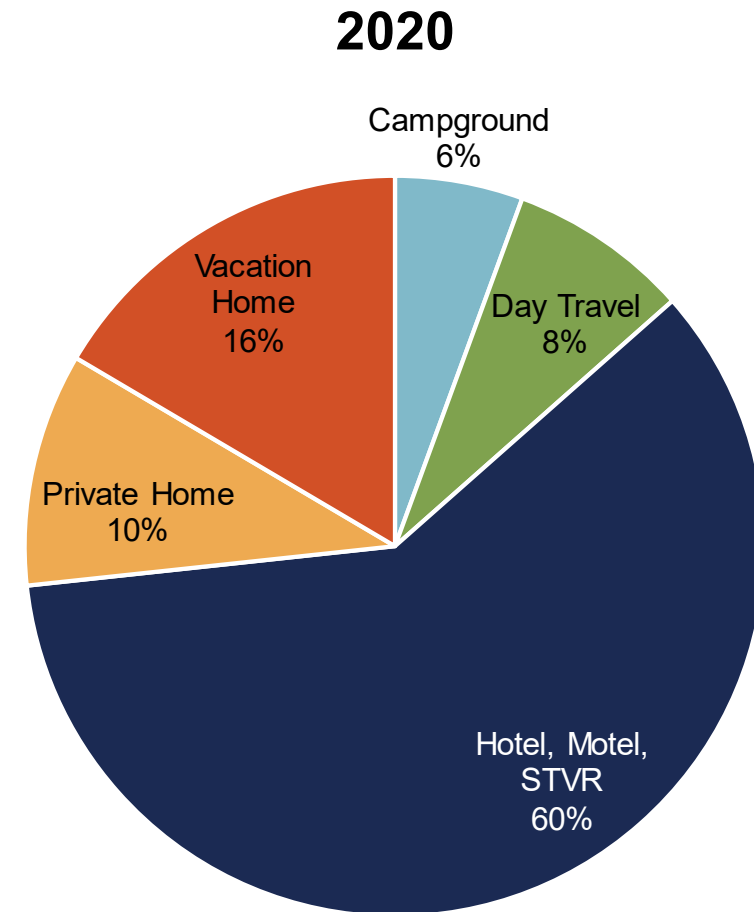
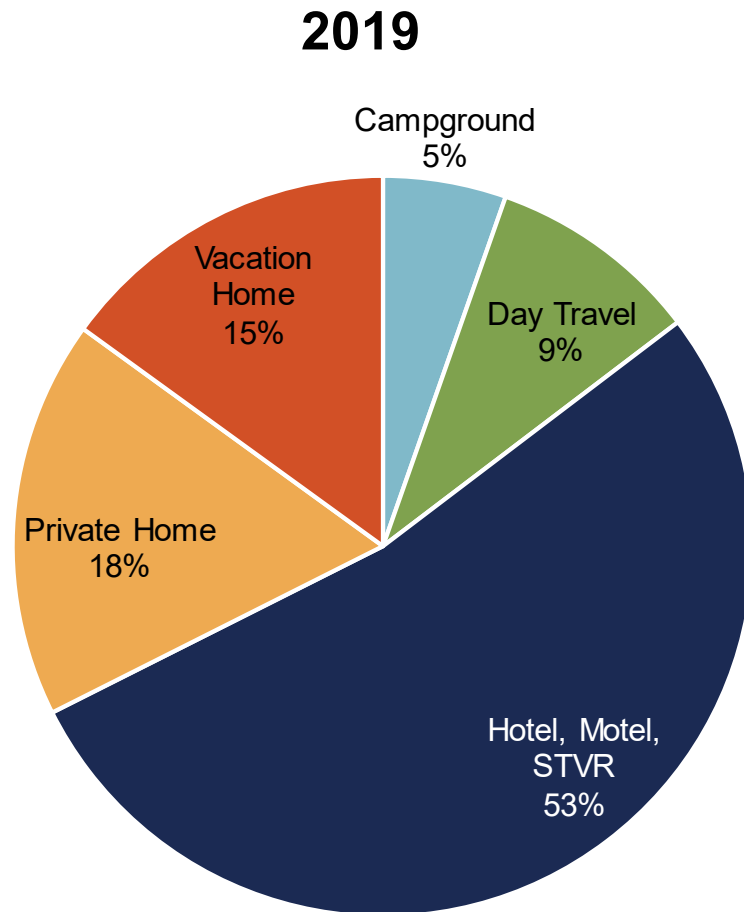
*STVR stands for Short-Term Vacation Rental

% of Spend by Accommodation Choice Coconino County



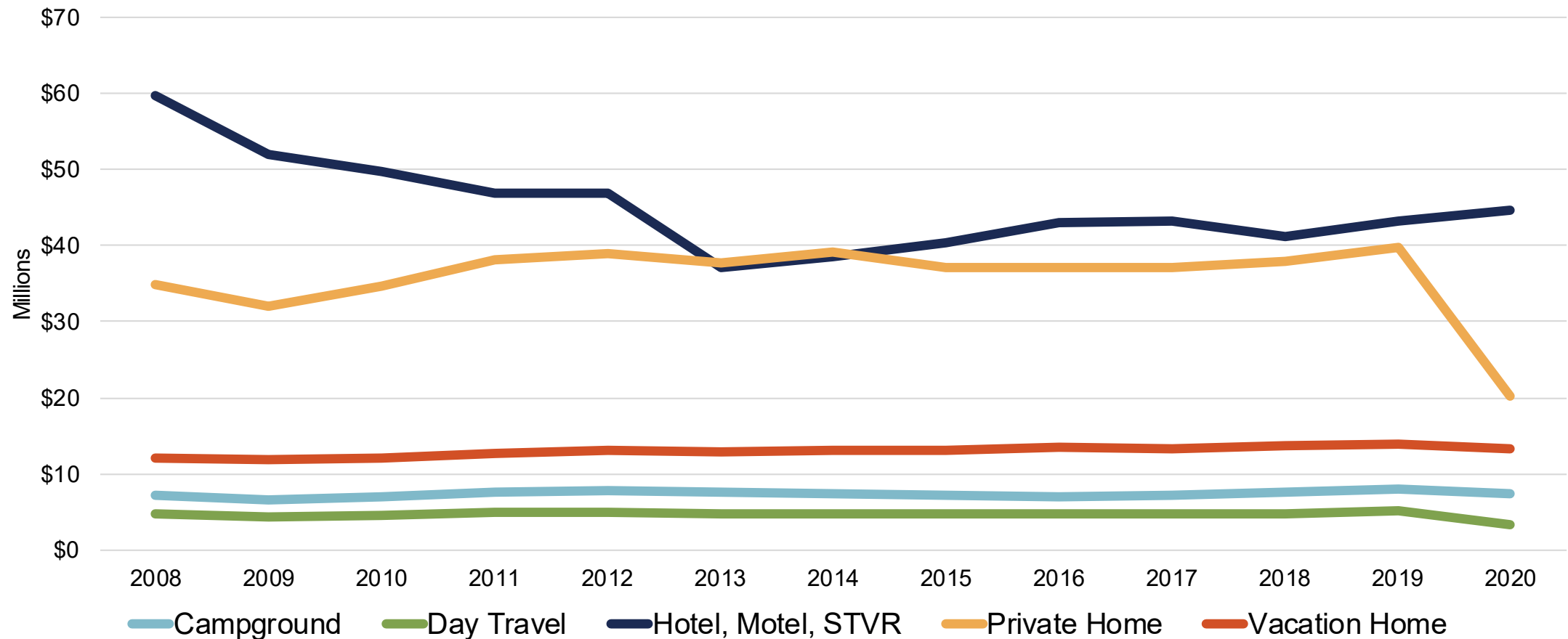
% of Spend by Accommodation Choice

Navajo County



Spending by Accommodation Choice

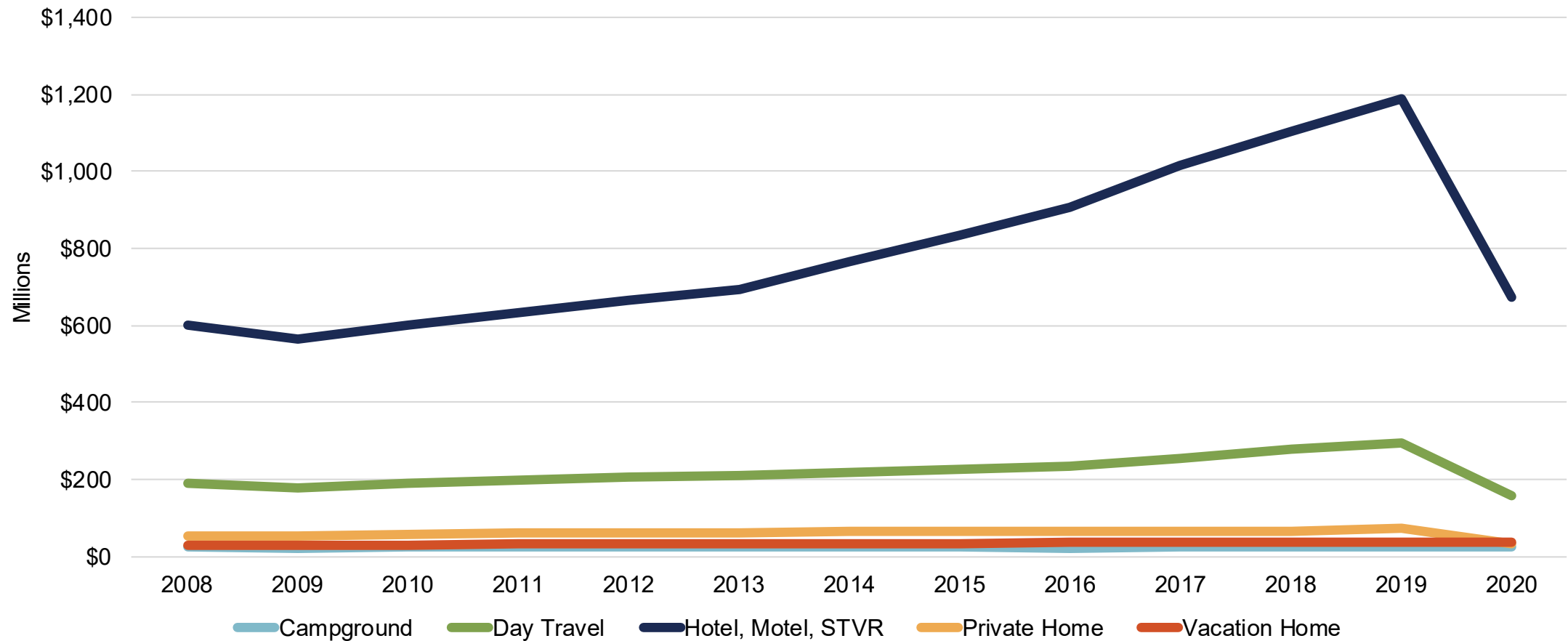
Apache County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

Spending by Accommodation Choice

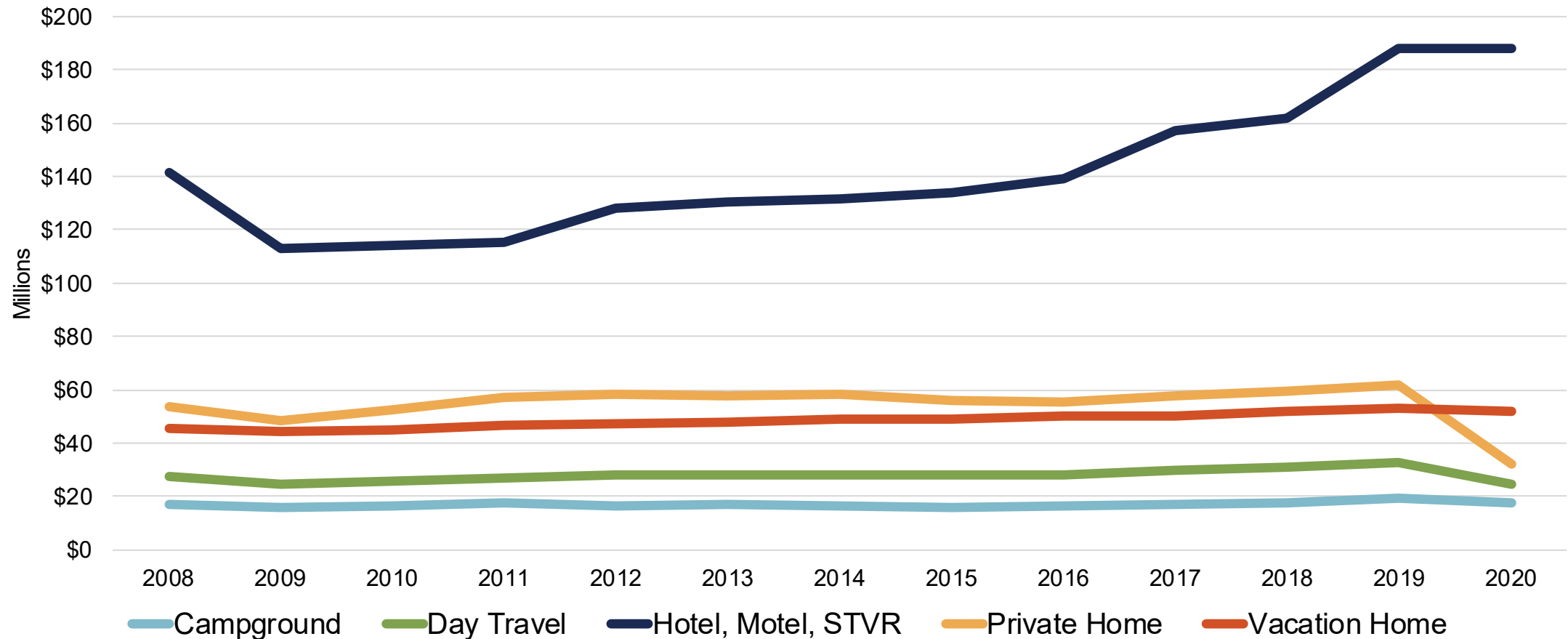
Coconino County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

Spending by Accommodation Choice

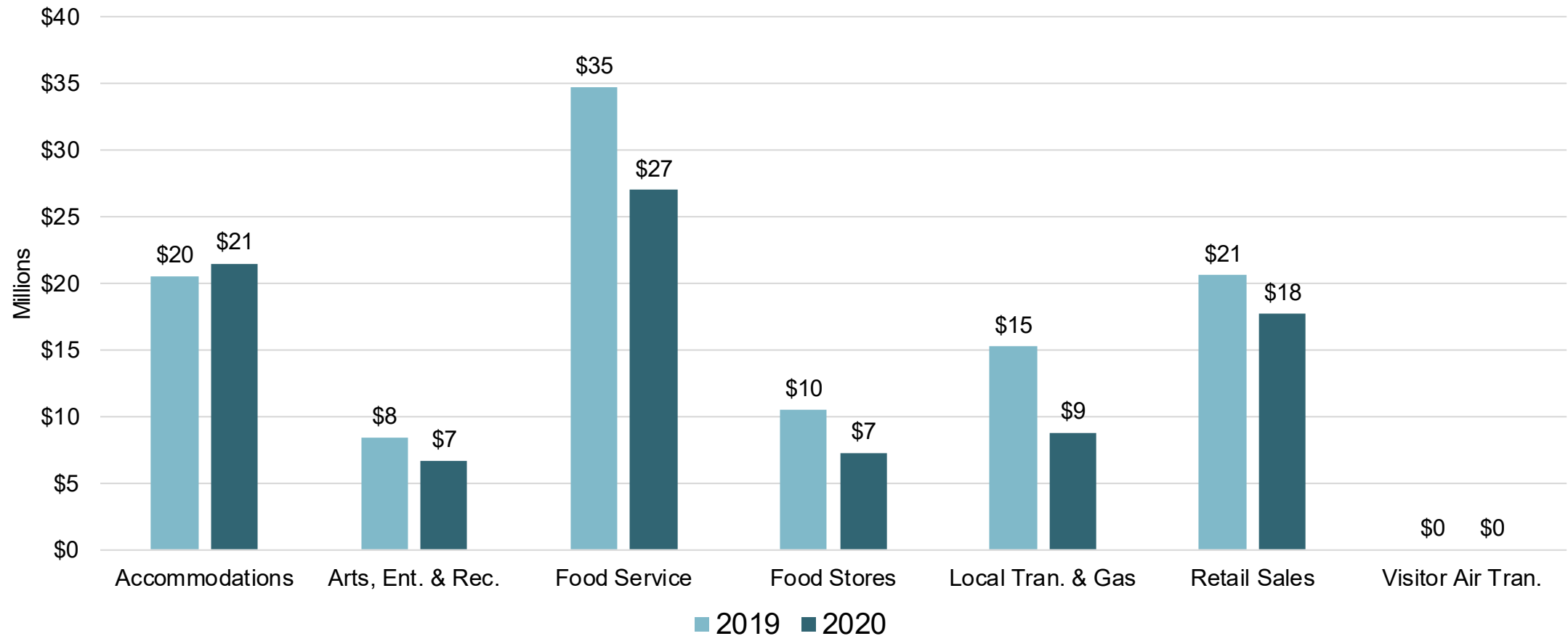
Navajo County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

Spending by Commodity Purchased

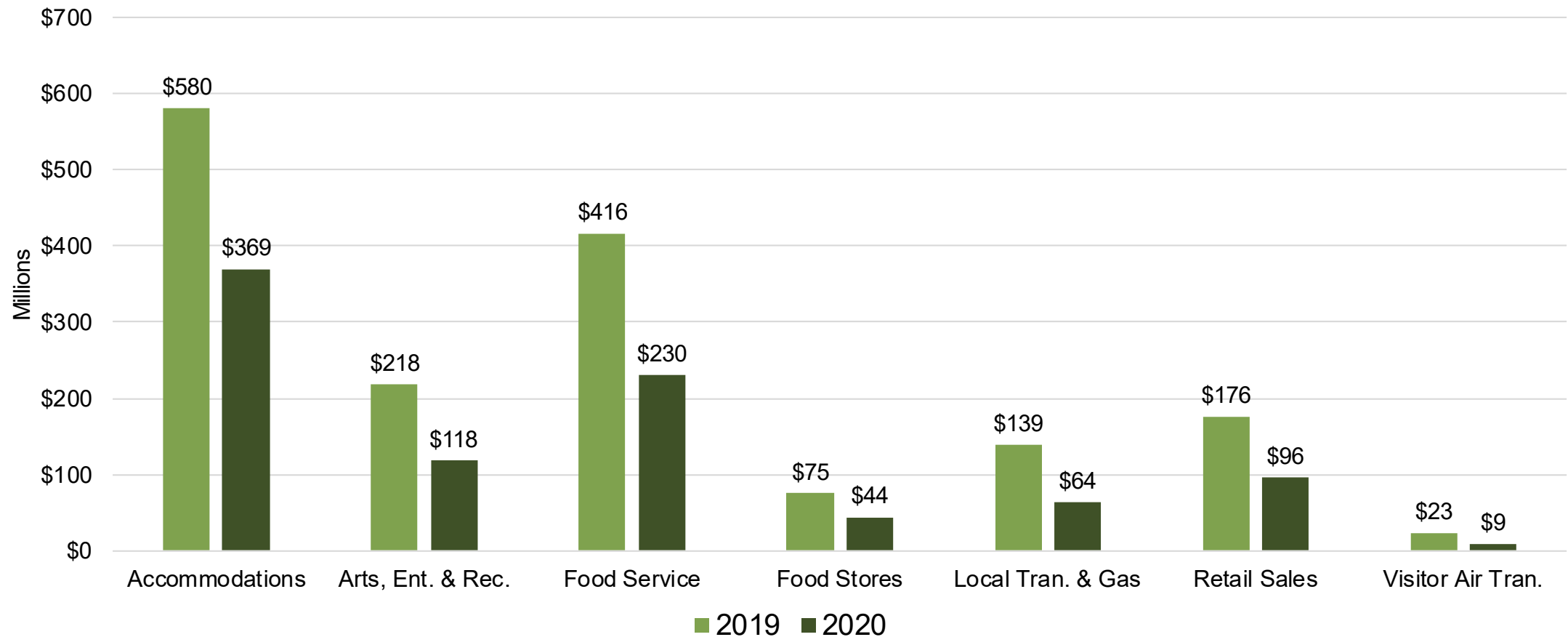
Apache County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

Spending by Commodity Purchased

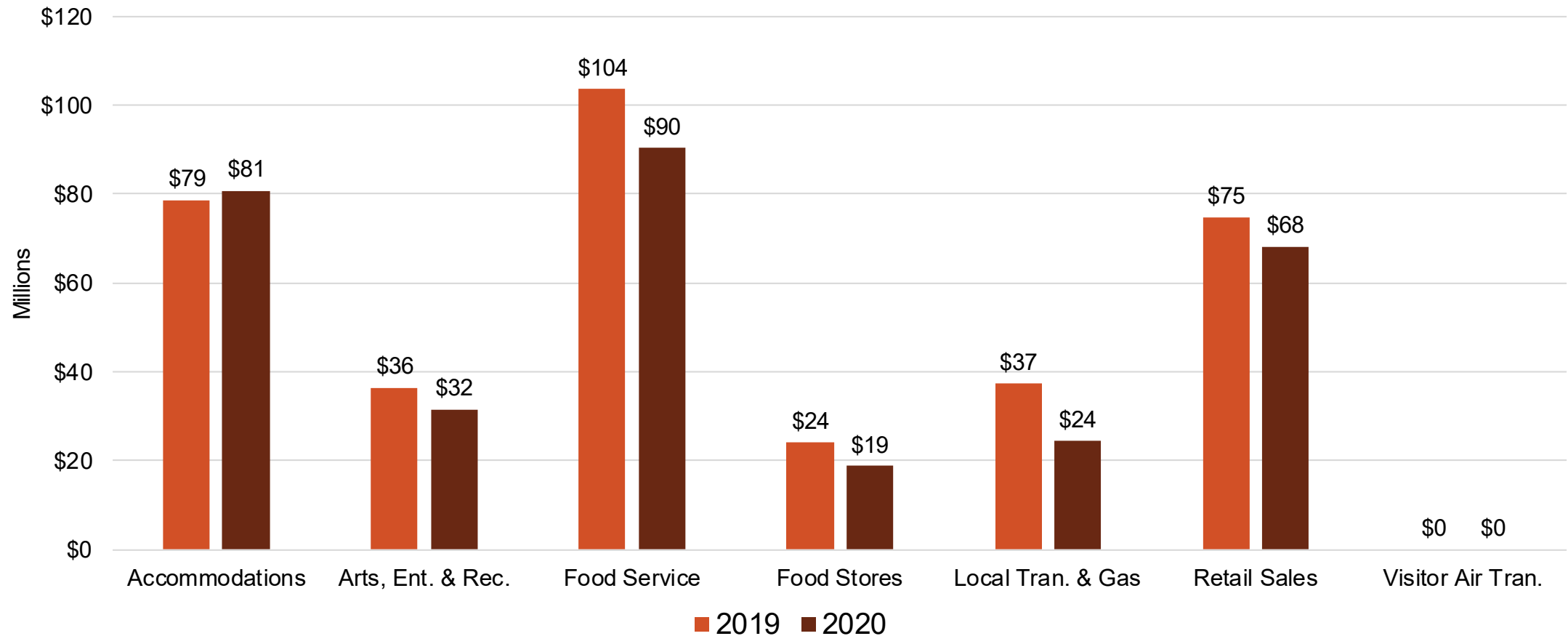
Coconino County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

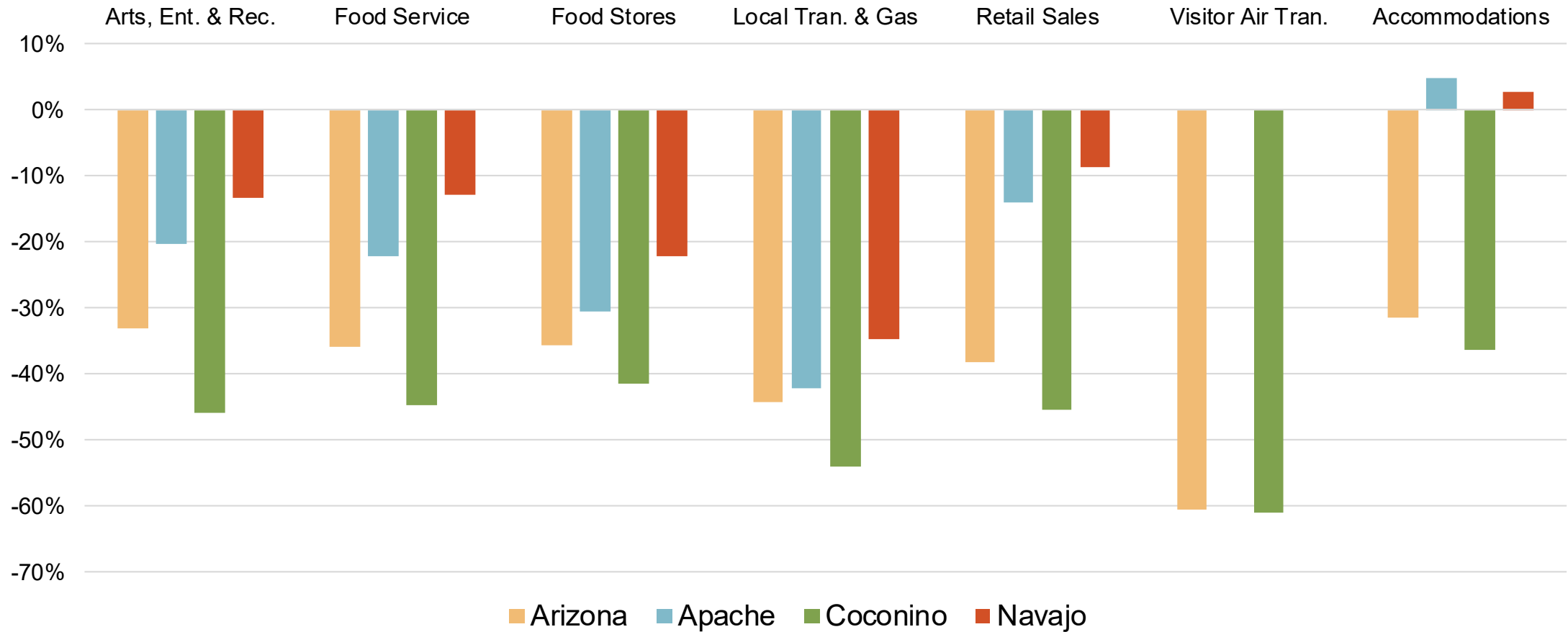
Spending by Commodity Purchased

Navajo County



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p

Spending by Commodity Purchased % change



Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p



2021 Tourism Indicators To-Date

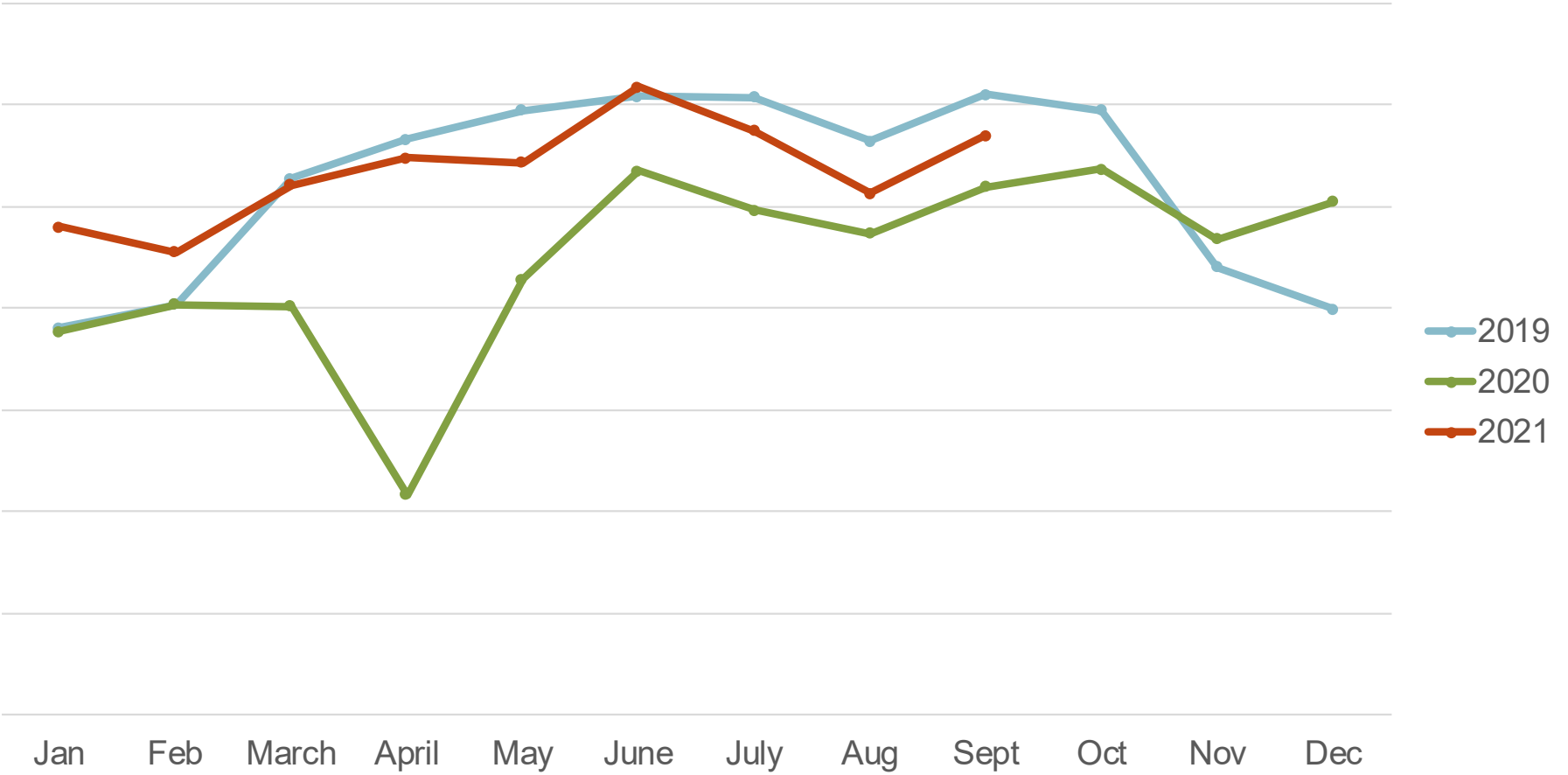
Northern Region

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



Lodging Occupancy

Apache County

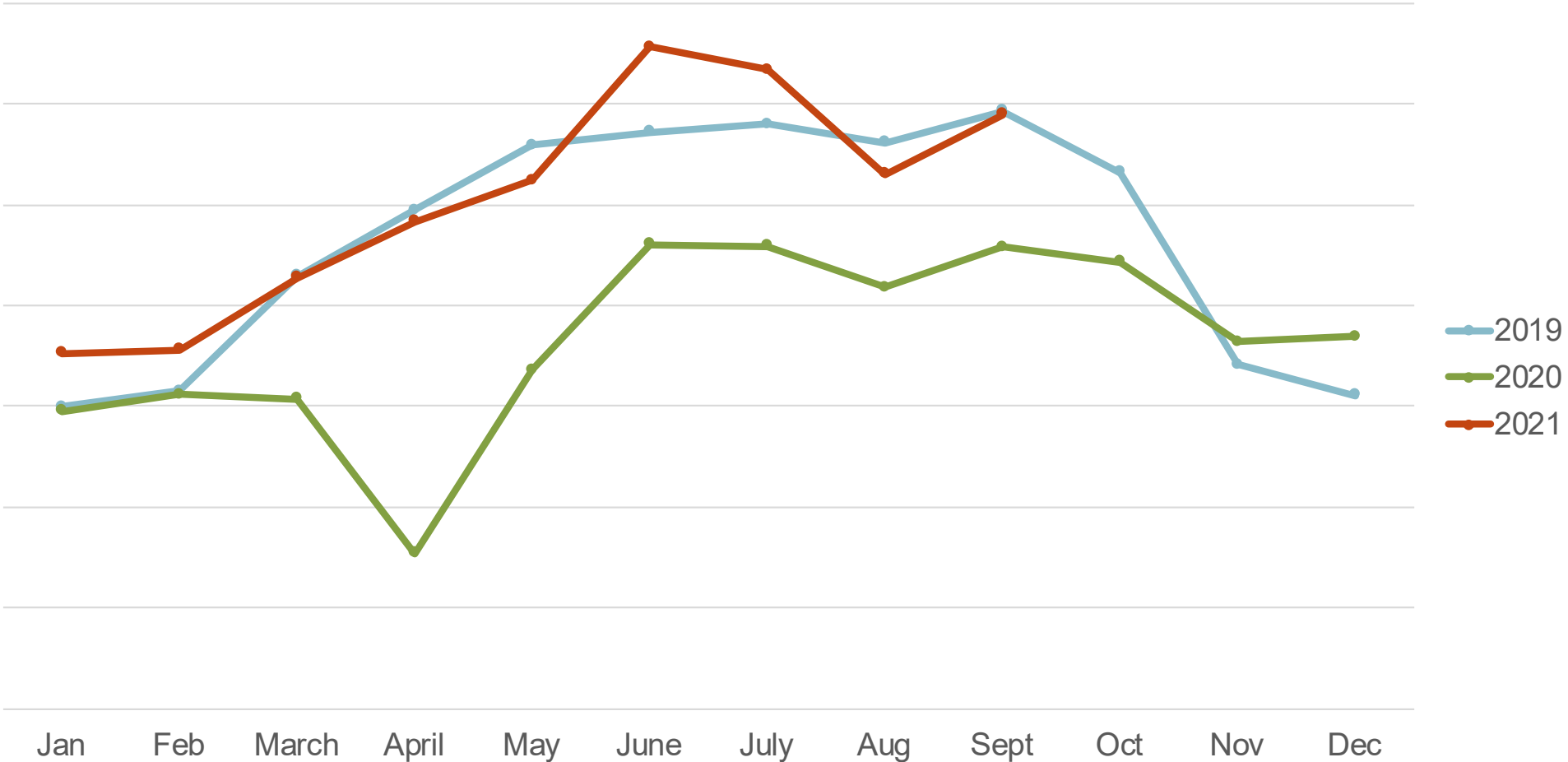


Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.



Lodging RevPAR

Apache County

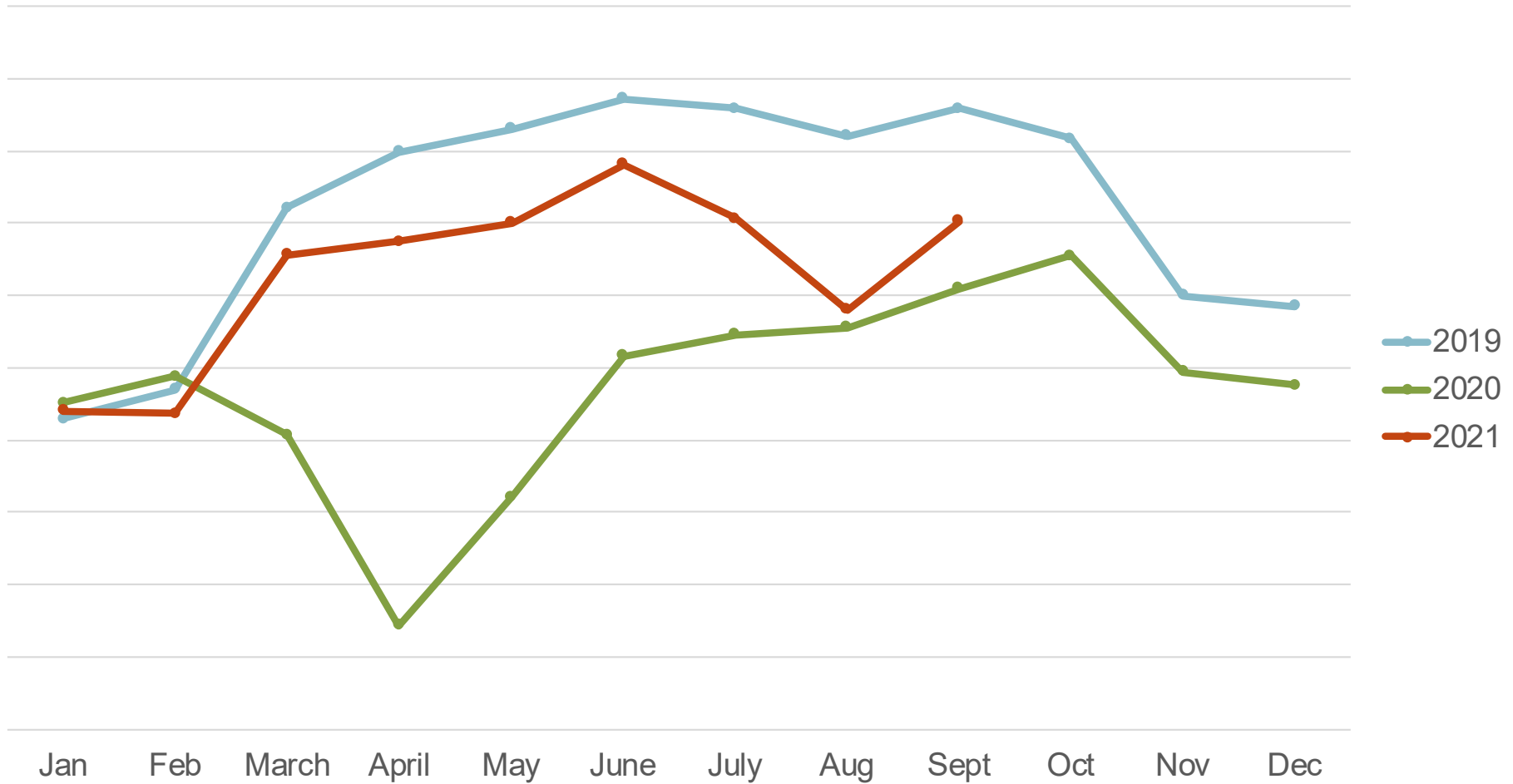


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Lodging Occupancy

Coconino County

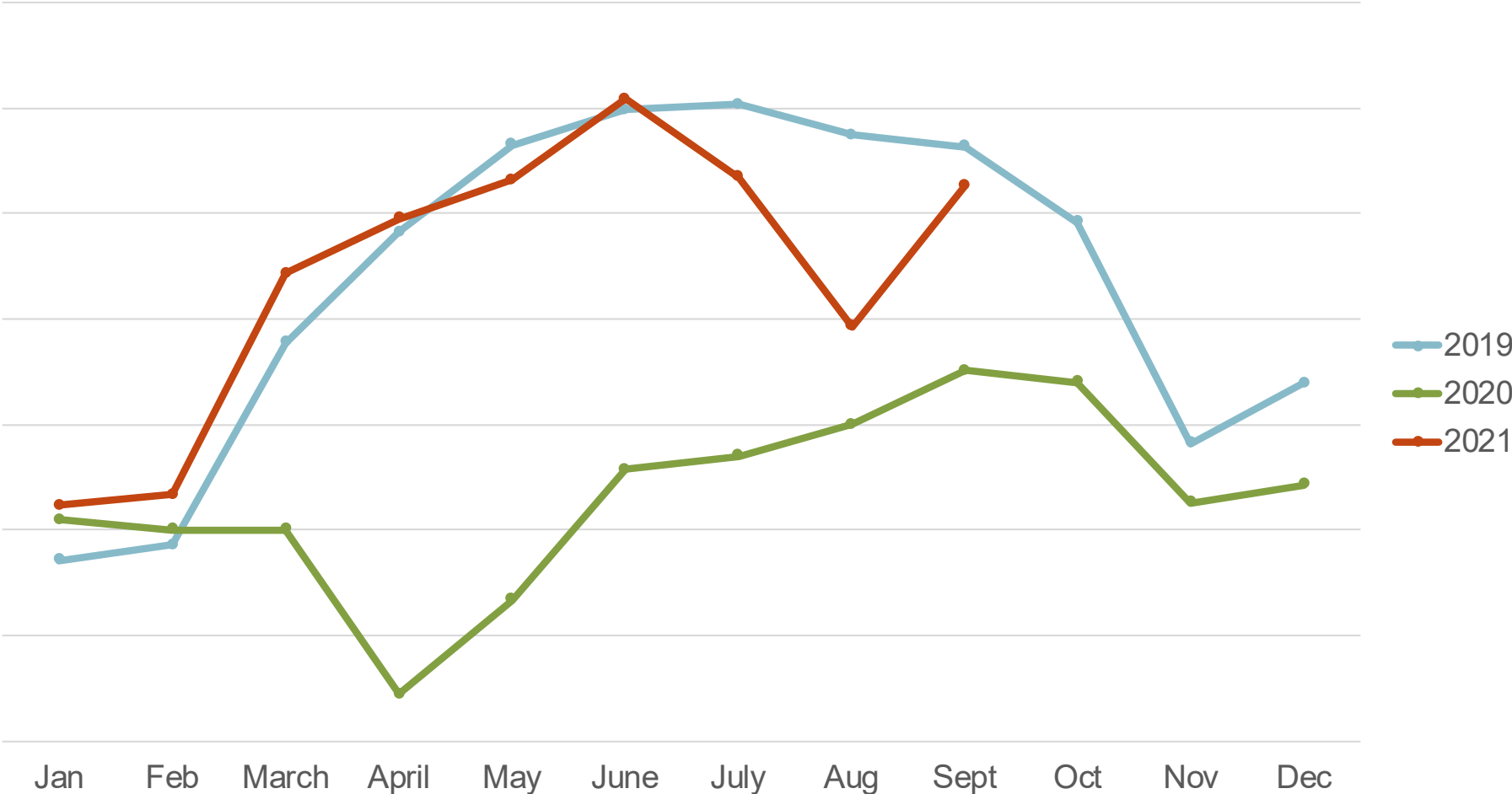


Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.



Lodging RevPAR

Coconino County

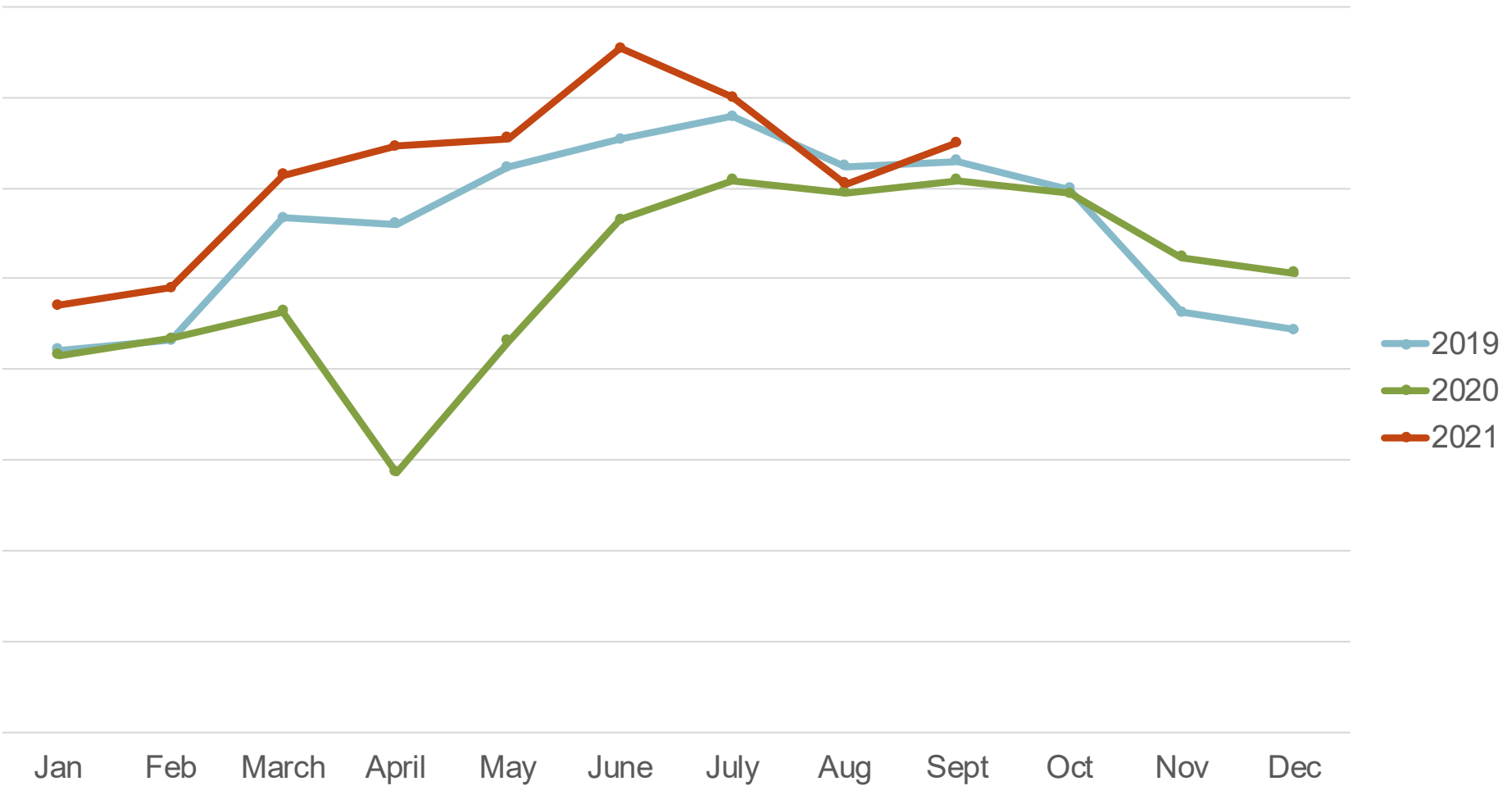


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Lodging Occupancy

Navajo County

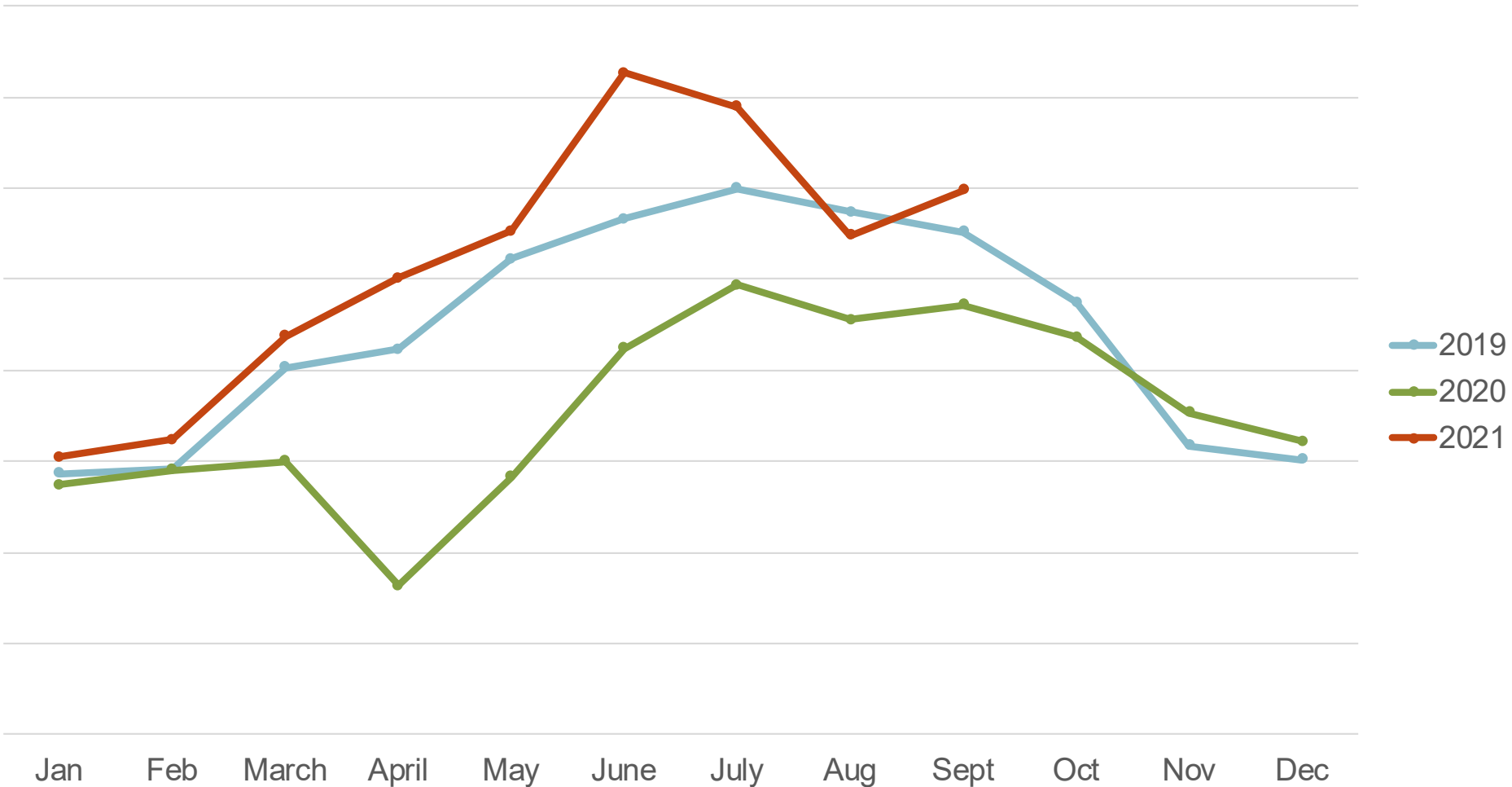


Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.



Lodging RevPAR

Navajo County

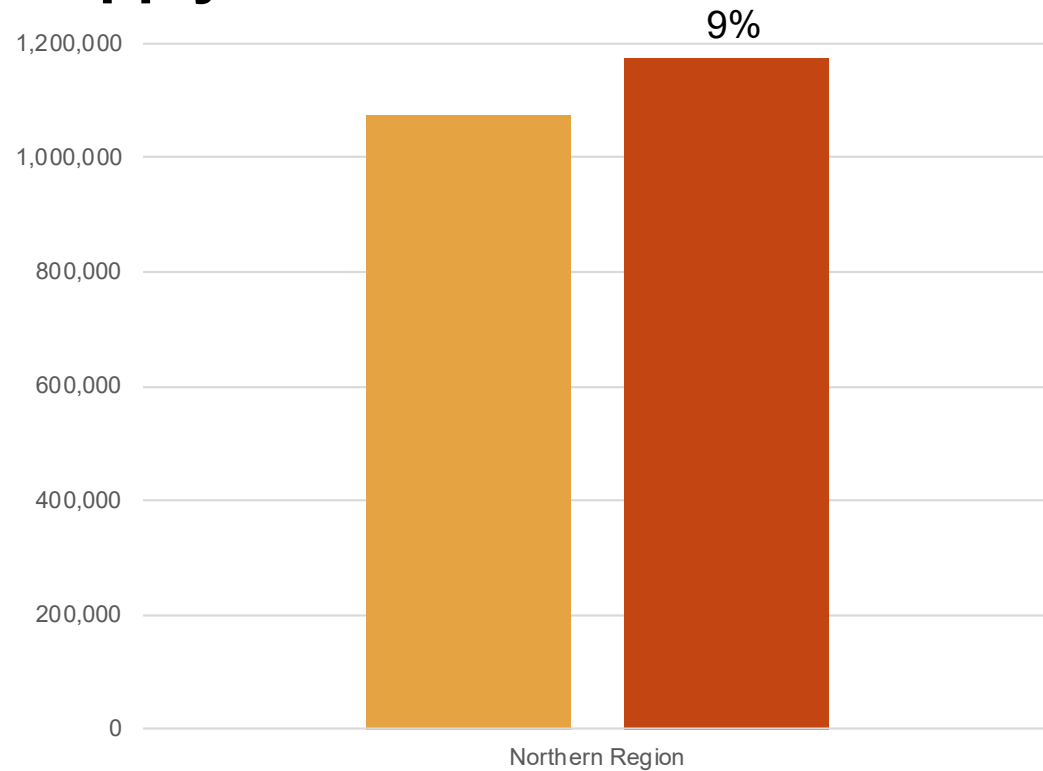


Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

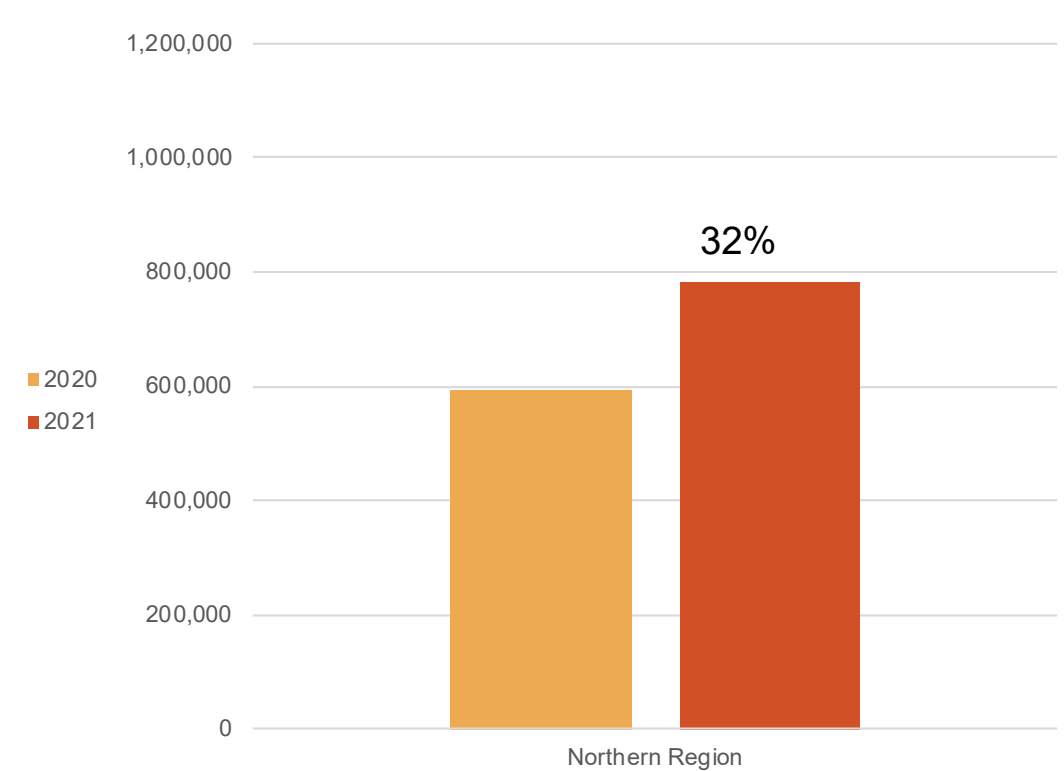
Airbnb – Northern Region

YOY % Change

Supply



Demand

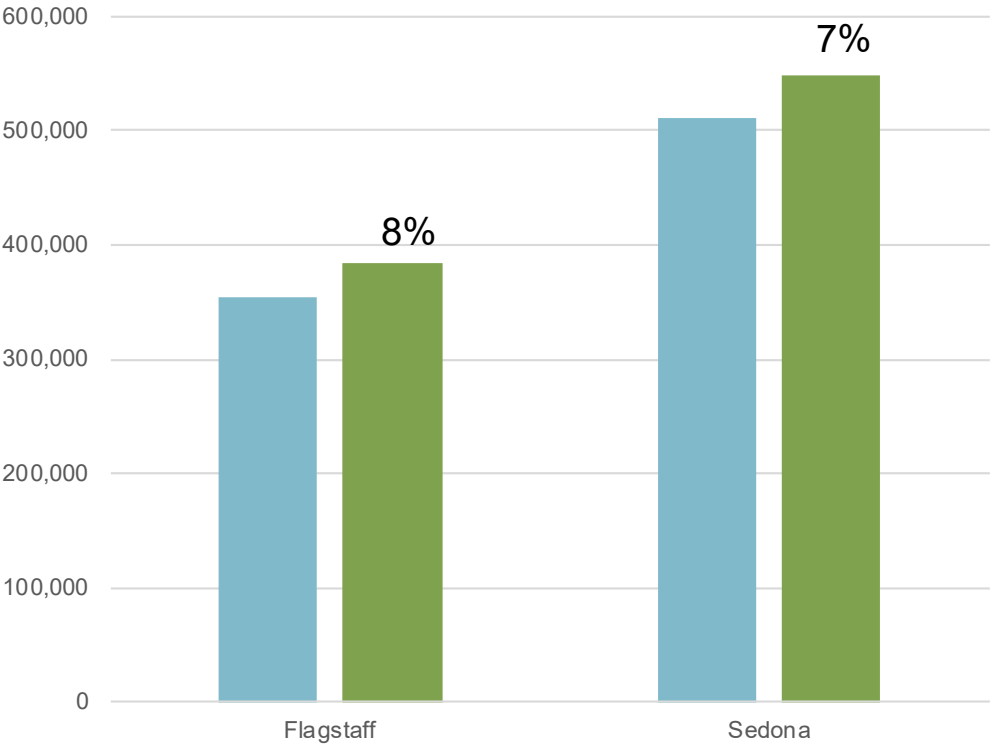




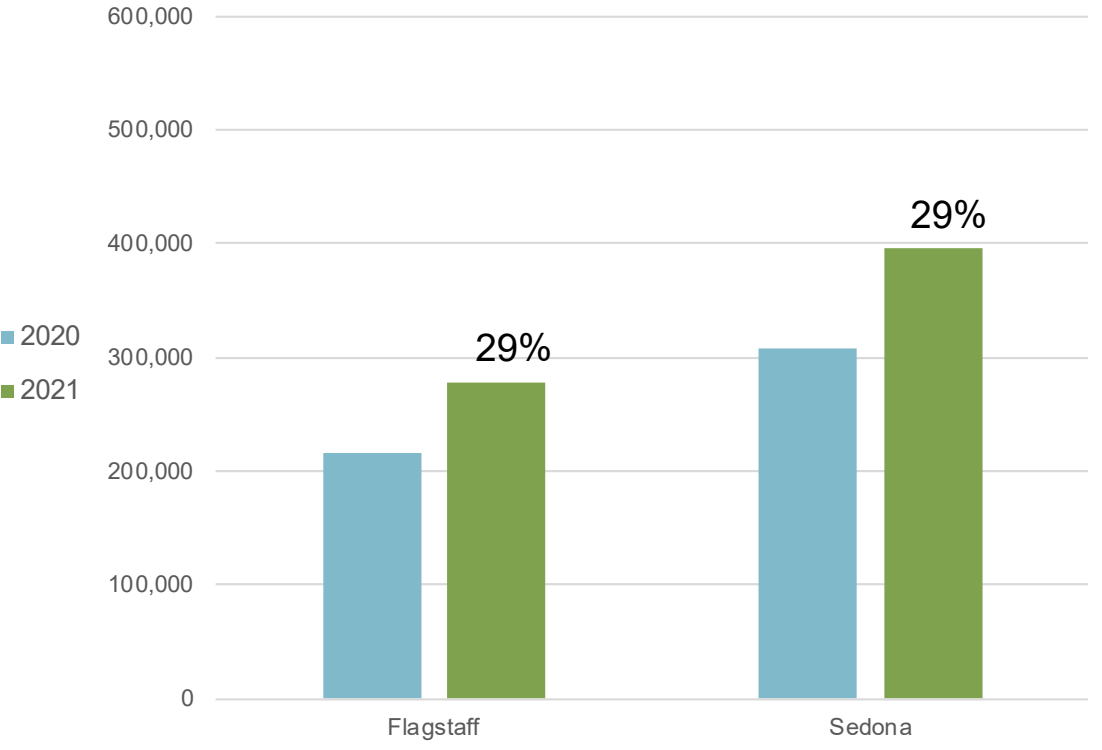
Airbnb – City Level

YOY % Change

Supply



Demand

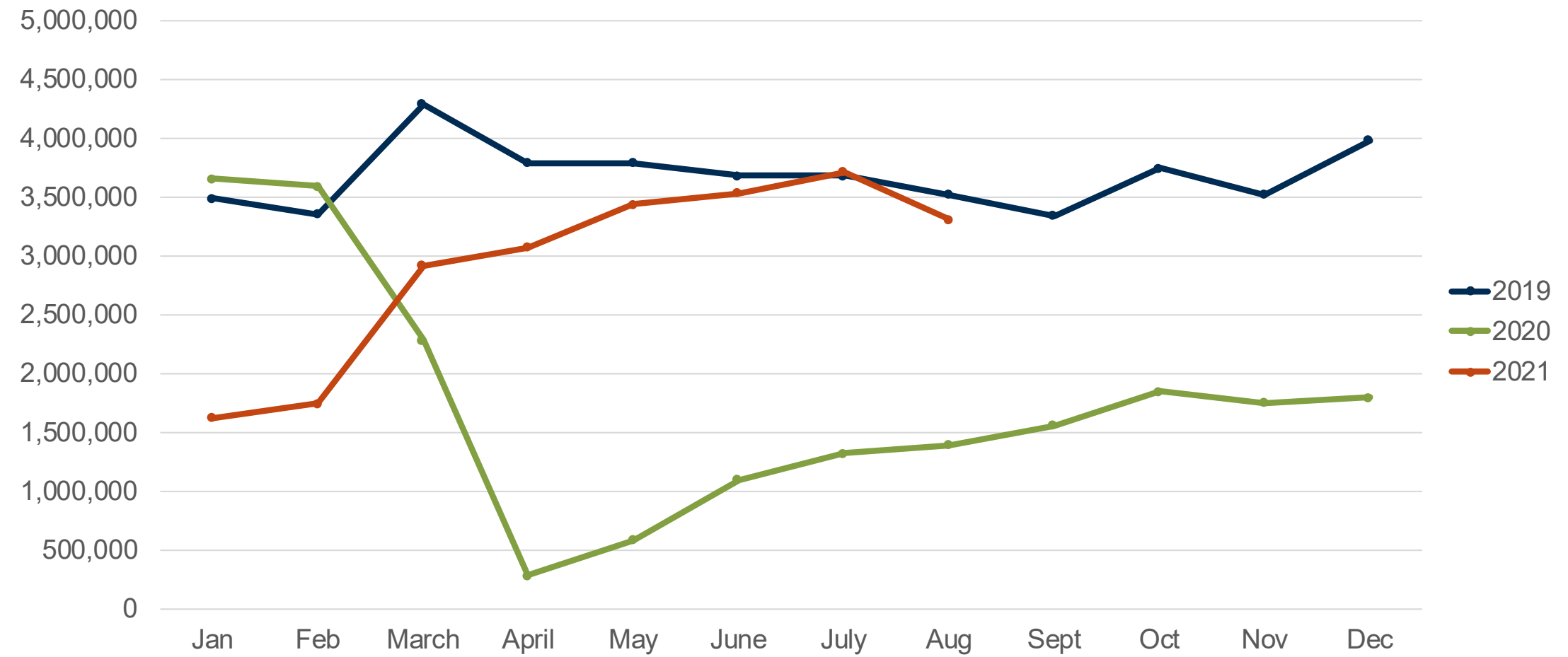


Source: AirDNA



Airport Passenger Traffic

Phoenix Sky Harbor - Domestic

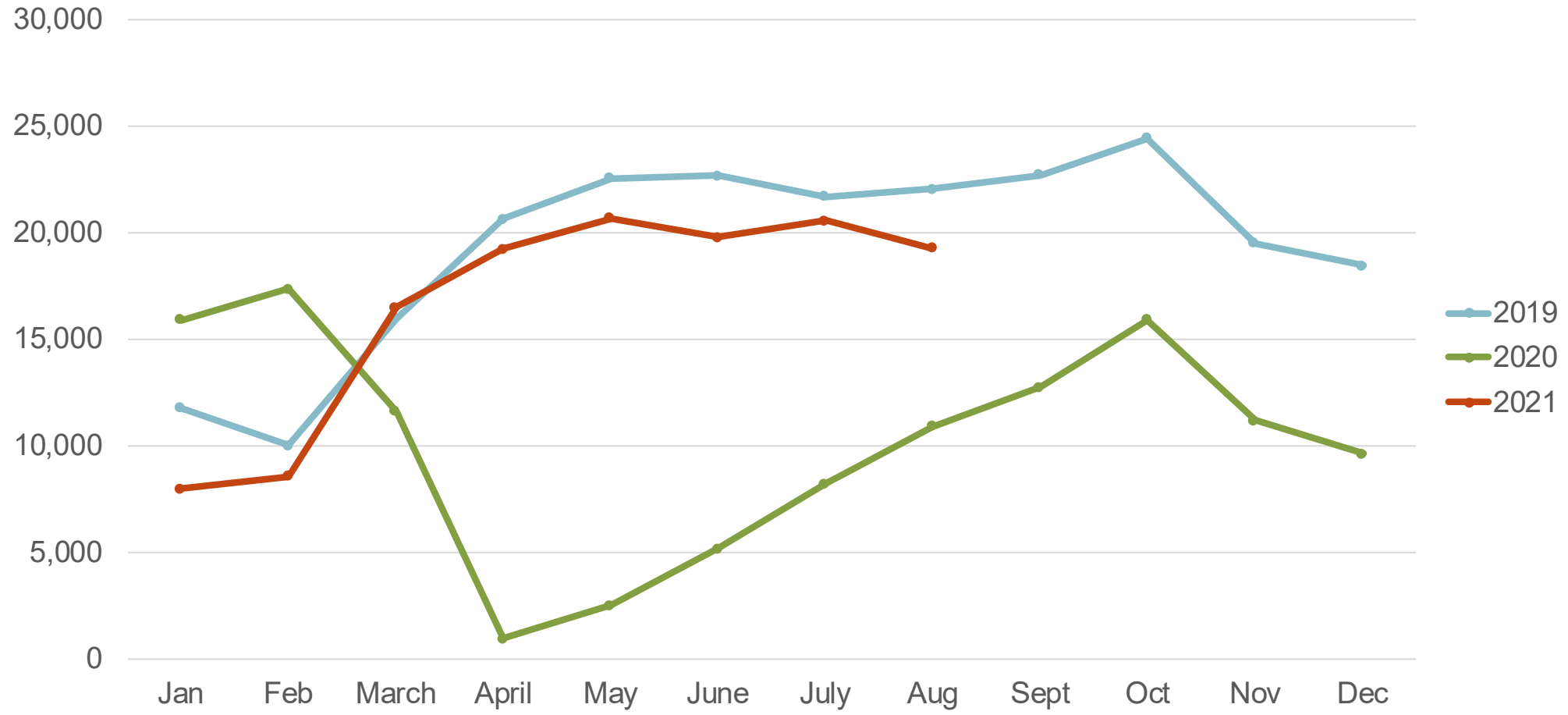


Source: [Airport Passenger Traffic](#), Northern Arizona University, Arizona Airports



Airport Passenger Traffic

Northern Region



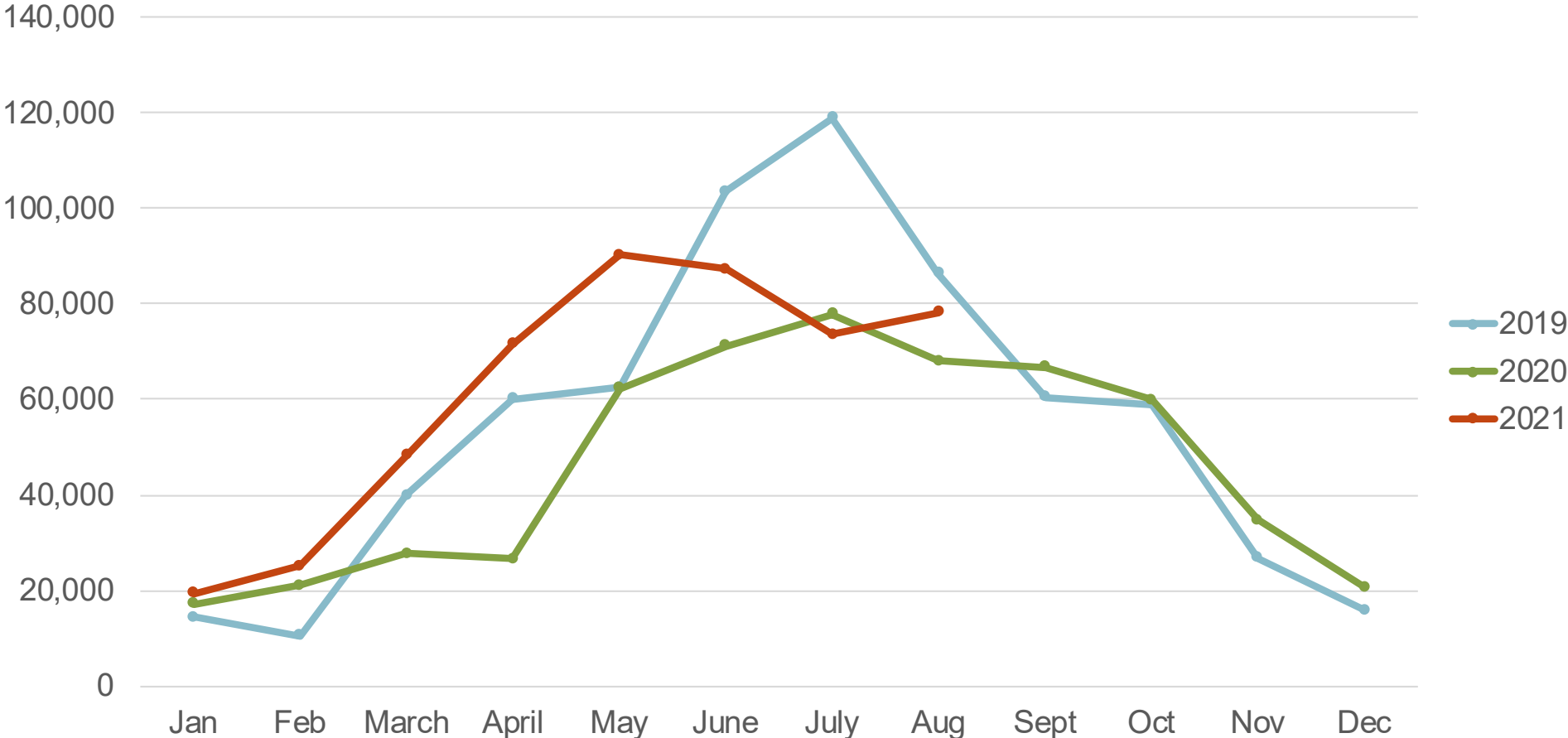
Includes: Flagstaff Pulliam, Page Municipal, Show Low Regional Airports

Source: [Airport Passenger Traffic](#), Northern Arizona University, Arizona Airports



State Park Visitation

Northern Region

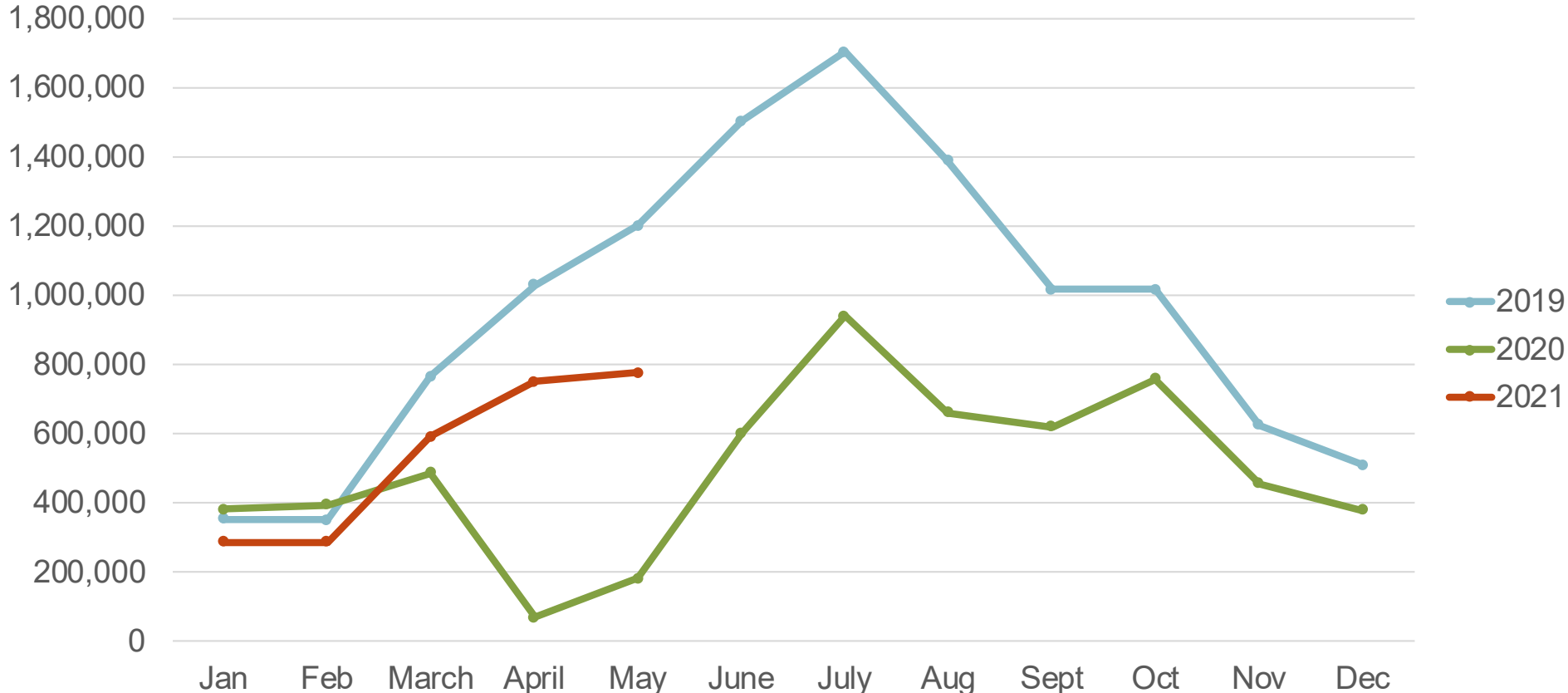


Includes: Fool Hollow Lake RA, Homolovi, Lyman Lake, Riordan Mansion, and Slide Rock State Parks

Source: [State Park Visitation](#), Northern Arizona University, Arizona State Parks

National Park Visitation

Northern Region



Includes: Canyon de Chelly NM, Glen Canyon NRA, Grand Canyon NP, Hubbell Trading Post NHS, Navajo NM, Petrified Forest NP, Sunset Crater Volcano NM, Walnut Canyon NM, and Wupatki NM

Source: [National Park Visitation](#), Northern Arizona University, [National Park Service](#)

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.

Nº4 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.

Nº5 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.

Nº7 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](https://tourism.az.gov/leavenotrace/) for tips on traveling sustainably in Arizona.



Brochure

Posters

Social Media Assets

Talking Points

Digital Courses

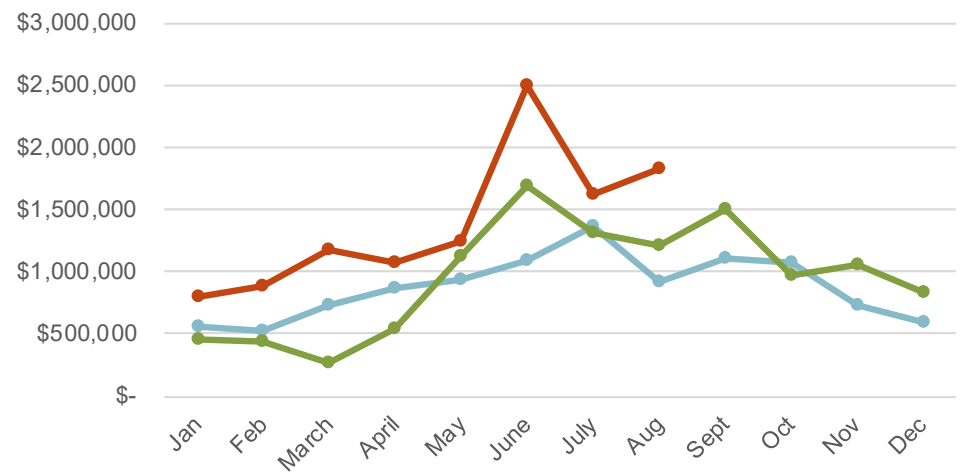
<https://tourism.az.gov/leavenotrace/>



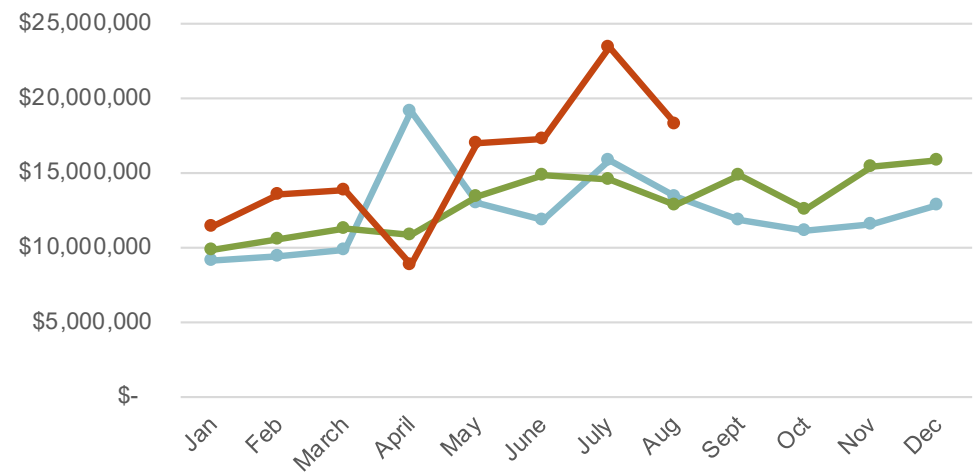
Gross Sales

Apache County

Lodging

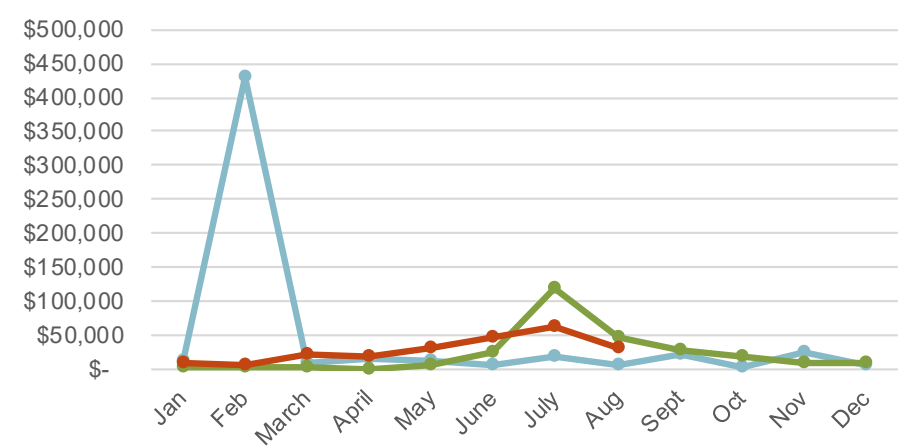


Retail

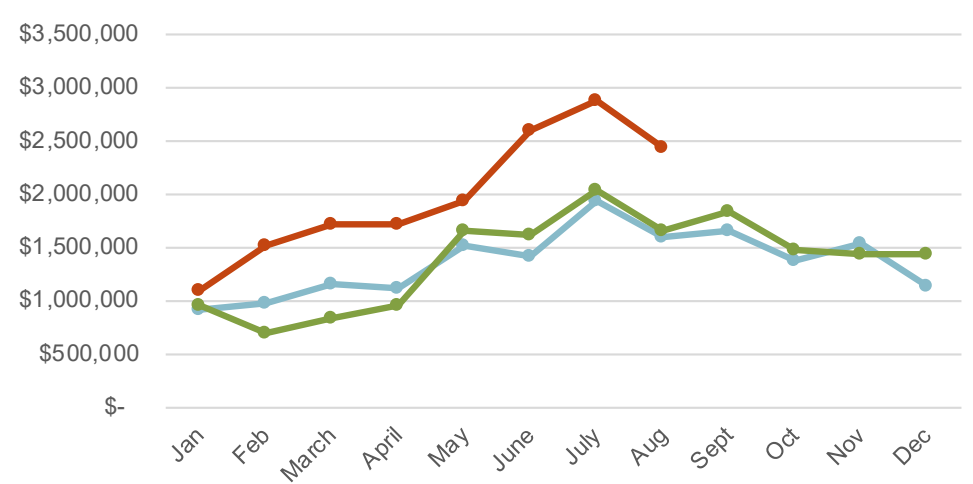


— 2019
— 2020
— 2021

Amusement



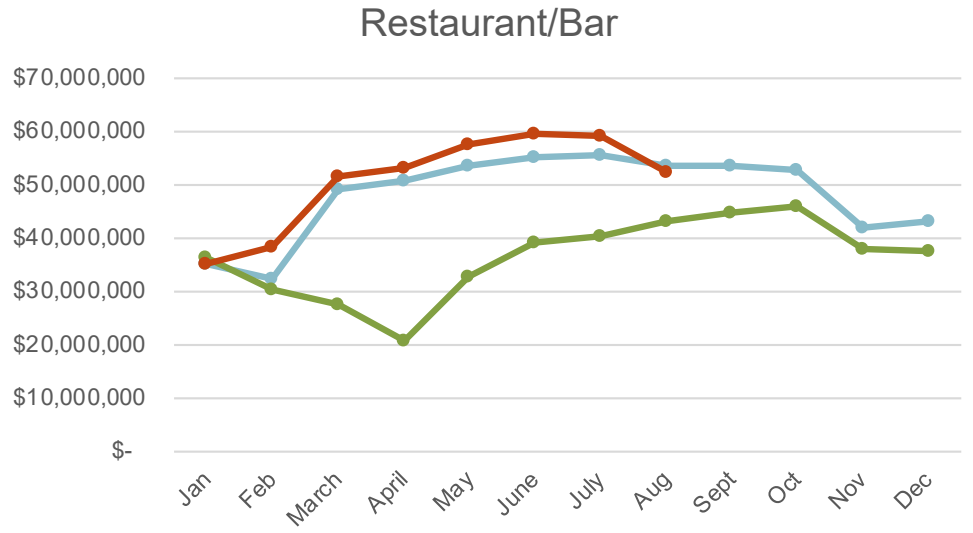
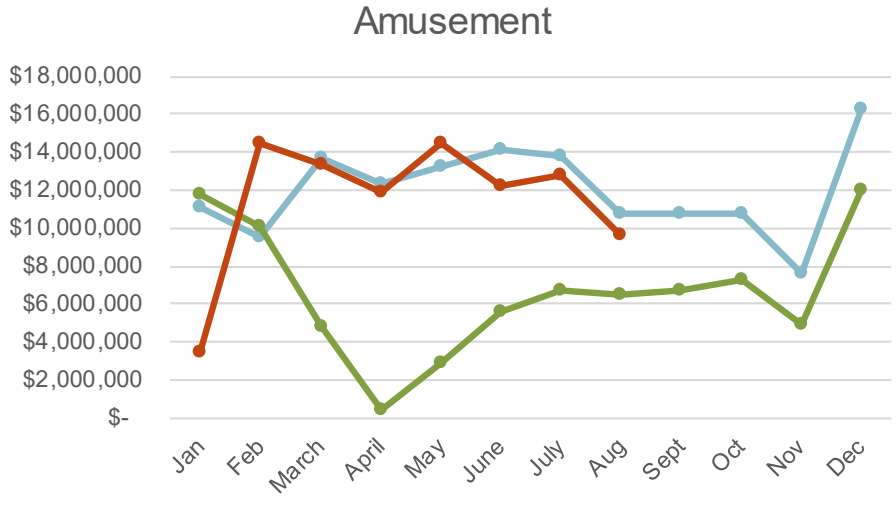
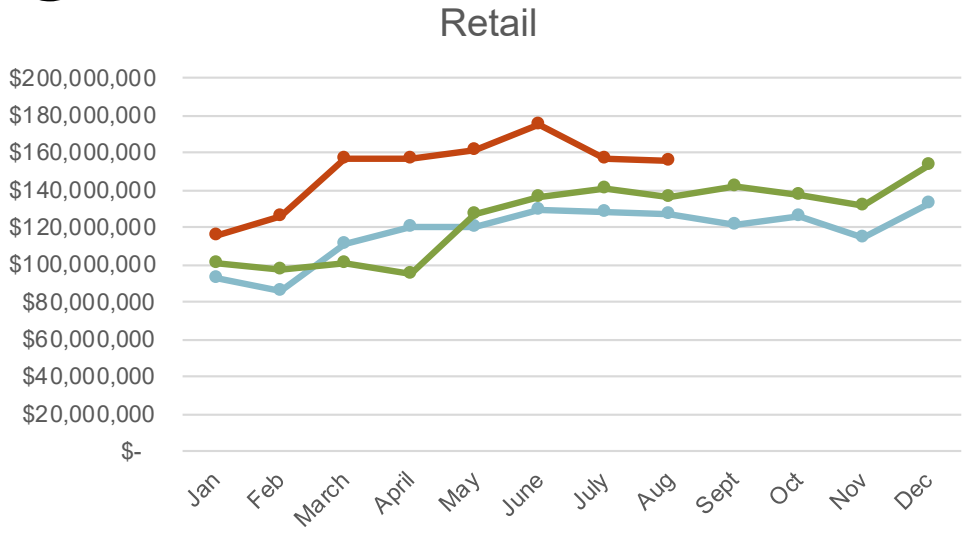
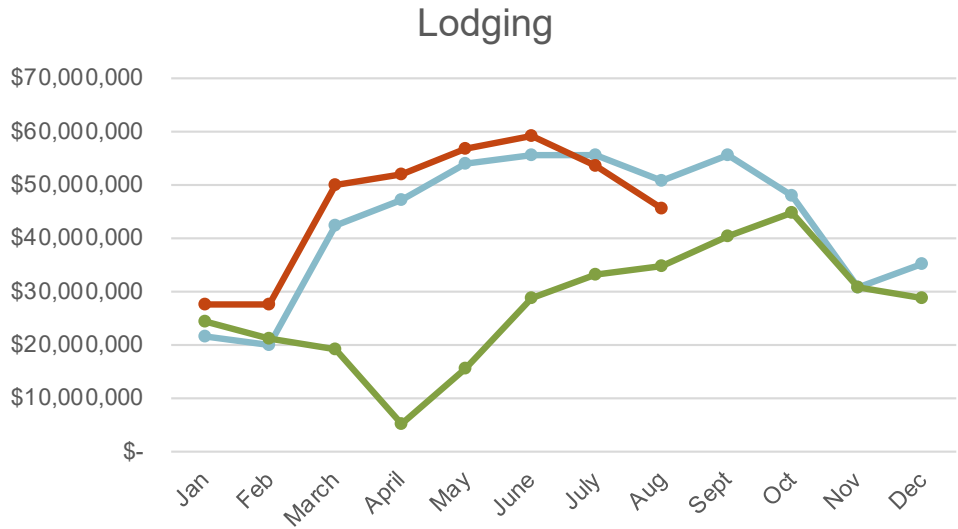
Restaurant/Bar



Source: [Northern Arizona University's Economic Policy Institute](https://www.northernarizona.edu/economic-policy-institute), Arizona Department of Revenue

Gross Sales

Coconino County

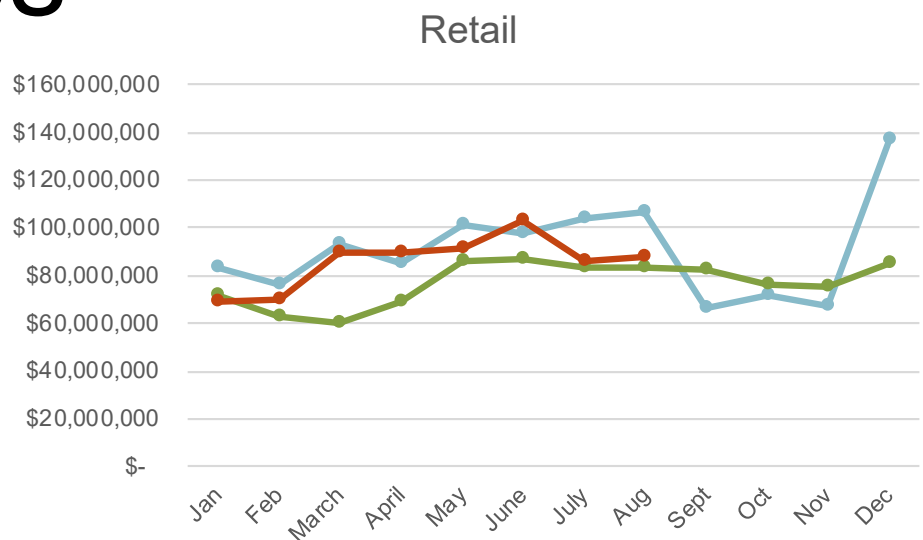
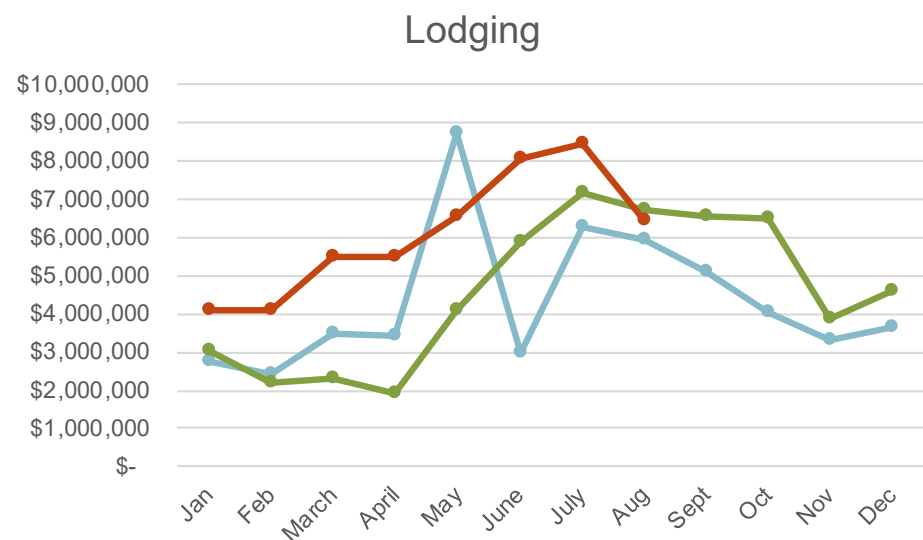


Source: [Northern Arizona University's Economic Policy Institute](https://www.northernarizona.edu/economic-policy-institute), Arizona Department of Revenue

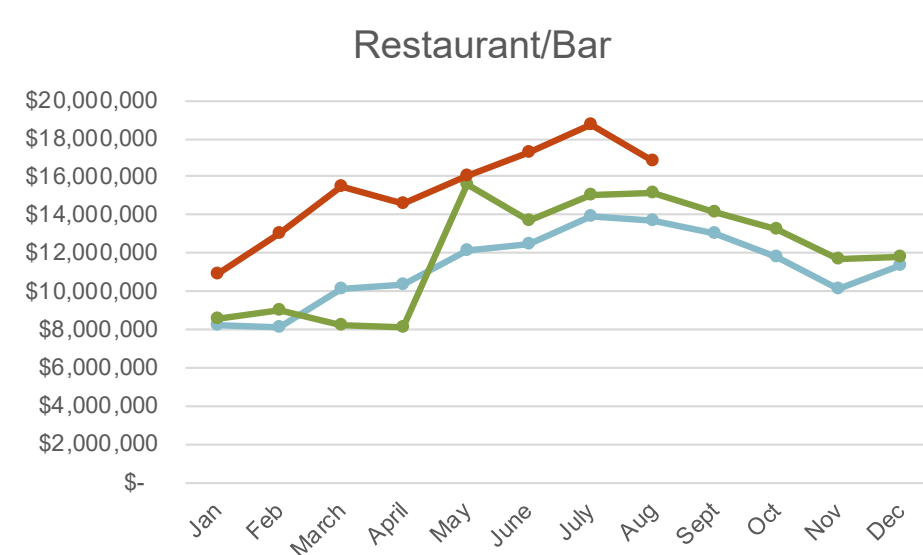
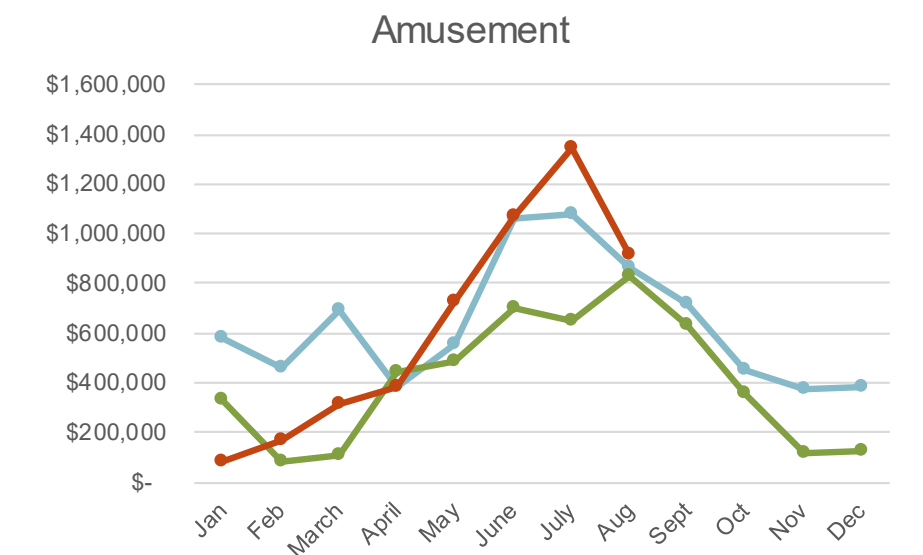


Gross Sales

Navajo County



— 2019
— 2020
— 2021



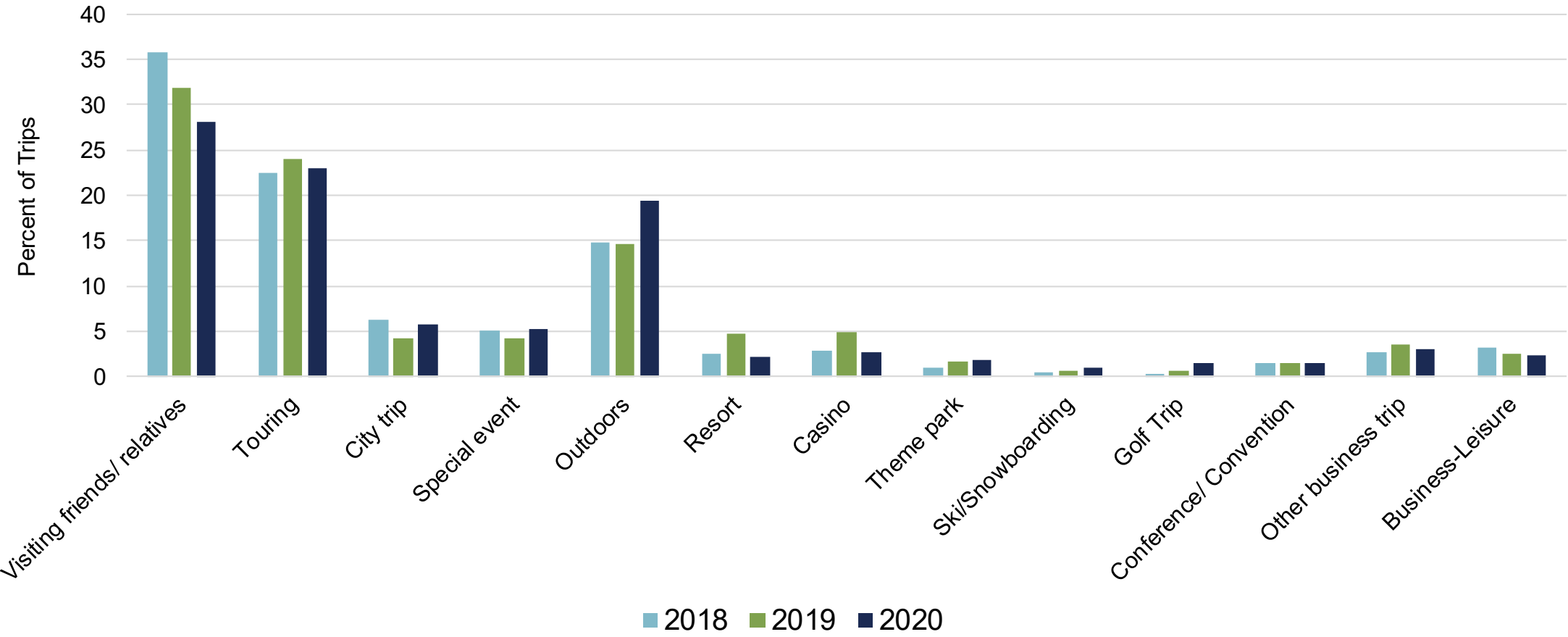
Source: [Northern Arizona University's Economic Policy Institute](https://www.northernarizona.edu/economic-policy-institute), Arizona Department of Revenue



Traveler Behaviors

Main Purpose of Trip Trend

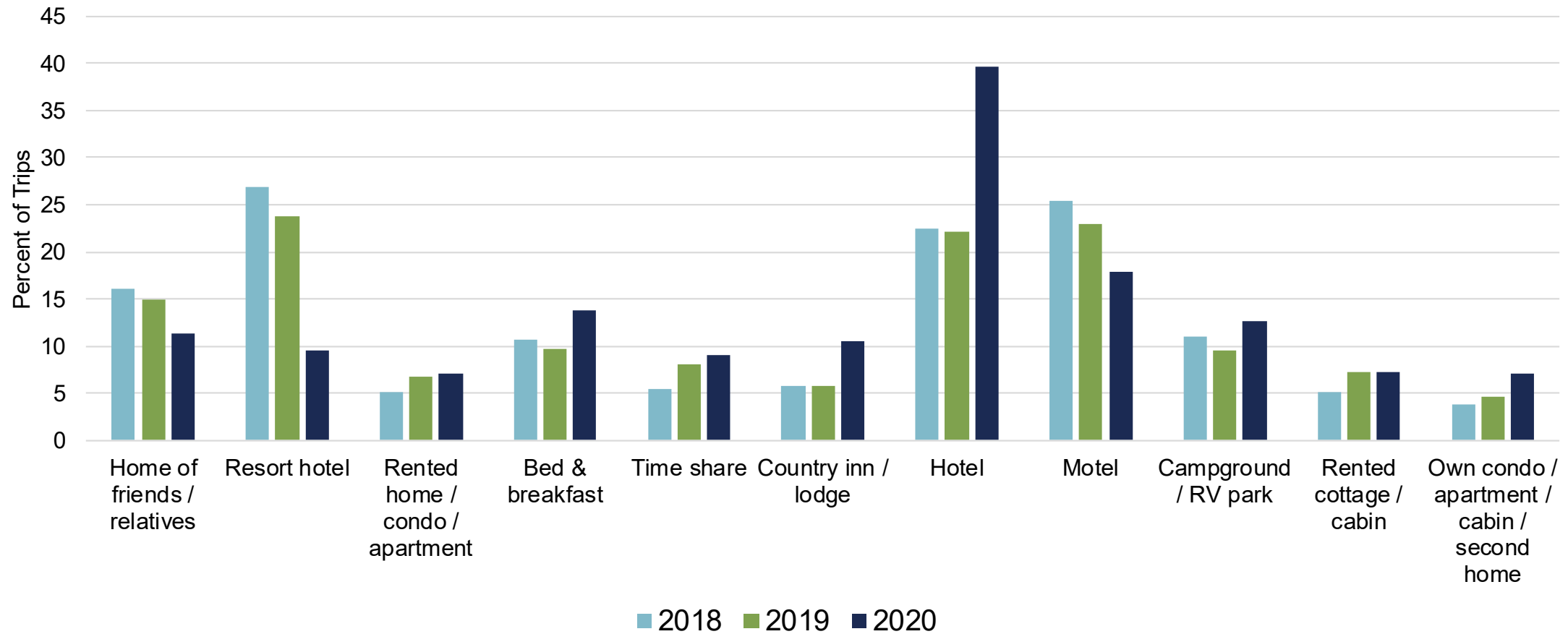
Northern Region



Source: Longwoods International

Accommodation Choice Trend

Northern Region



Source: Longwoods International

Top Origin Markets Northern Region

DMA	Percent of Trips in 2018
Phoenix, AZ	32
Los Angeles, CA	8
Tucson (Nogales), AZ	5
New York, NY	4
Albuquerque-Santa Fe, NM	3
Chicago, IL	2
Las Vegas, NV	2
Denver, CO	2
Houston, TX	2
Philadelphia, PA	2

DMA	Percent of Trips in 2019
Phoenix, AZ	35
Los Angeles, CA	8
New York, NY	5
Tucson (Nogales), AZ	4
Las Vegas, NV	2
Albuquerque-Santa Fe, NM	2
Salt Lake City, ID/UT	2
Washington, DC	2
Dallas-Ft. Worth, TX	2
Pittsburgh, PA	1

DMA	Percent of Trips in 2020
Phoenix, AZ	30
Los Angeles, CA	10
New York, NY	6
Tucson (Nogales), AZ	4
Seattle-Tacoma, WA	2
San Francisco-Oakland-San Jose, CA	2
Chicago, IL	2
Salt Lake City, ID/UT	2
Philadelphia, PA	2
Las Vegas, NV	2

Source: Longwoods International

Top Origin Markets 2021

DMA	Percent of Trips in Q1 2021
Phoenix, AZ	24
Los Angeles, CA	8
New York, NY	8
Chicago, IL	4
Lincoln & Hstngs-Kearney Plus, NE	3
Tucson (Nogales), AZ	3
Seattle-Tacoma, WA	2
Miami-Ft. Lauderdale, FL	2
Philadelphia, PA	2
Orlando-Daytona Beach-Melbrn, FL	2

DMA	Percent of Trips in Q2 2021
Phoenix, AZ	23
Los Angeles, CA	9
New York, NY	7
Lincoln & Hstngs-Kearney Plus, NE	4
Tucson (Nogales), AZ	4
Atlanta, GA	3
Spokane, ID/WA	3
San Francisco-Oakland-San Jose, CA	2
Dallas-Ft. Worth, TX	2
Chicago, IL	2

Source: Longwoods International

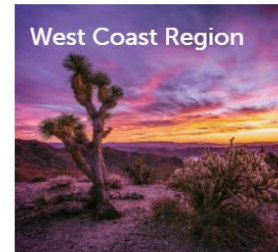


2020 Visitor profile

Regional Profiles

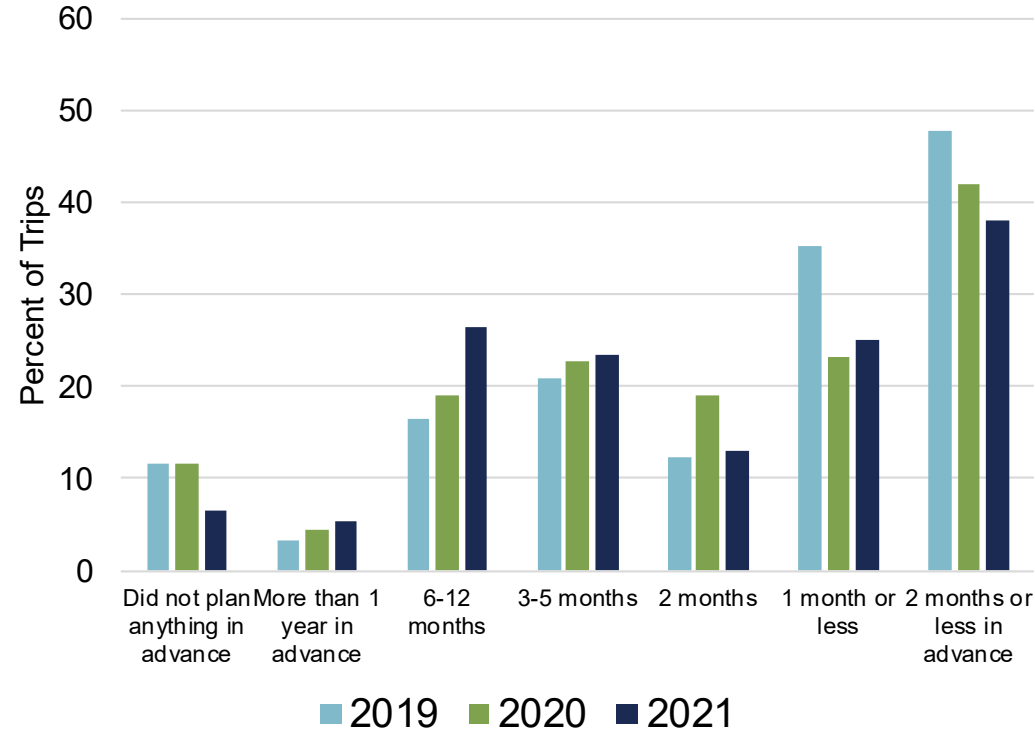
The Research Division generates, tracks, and analyzes data about domestic and international travel behavior, economic impacts and industry trends, and serves as the research repository for all travel-related tourism information in the state. This information is available to internal and external constituents, government leaders and industry partners. The division drives the strategic goals of AOT and continually refines its research capabilities to better understand and reach targeted visitors.

Overnight Visitation	Visitor Spending
32.1 million	\$15 billion
<small>Total Overnight Visitation, 2020</small>	<small>Direct Travel Spending, 2020</small>
Taxes	Jobs
\$2.7 billion	160.5 thousand
<small>Total Tax Revenue, 2020</small>	<small>Total Generated Employment, 2020</small>

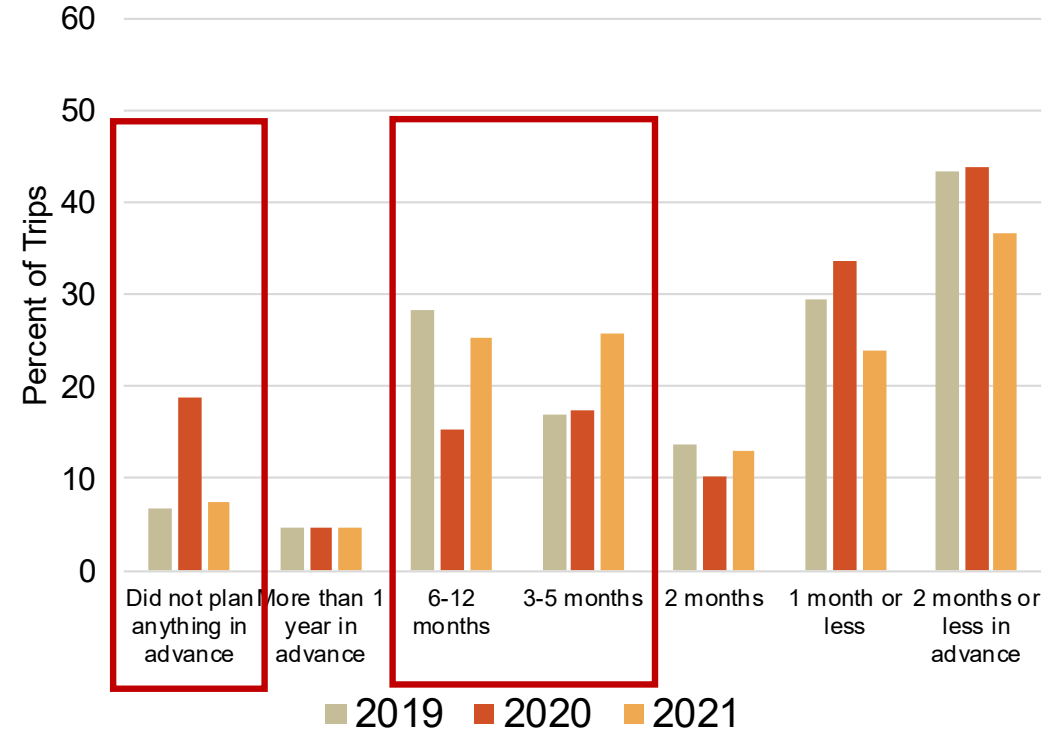


Trip Planning Window Northern Region

Q1 (January-March)



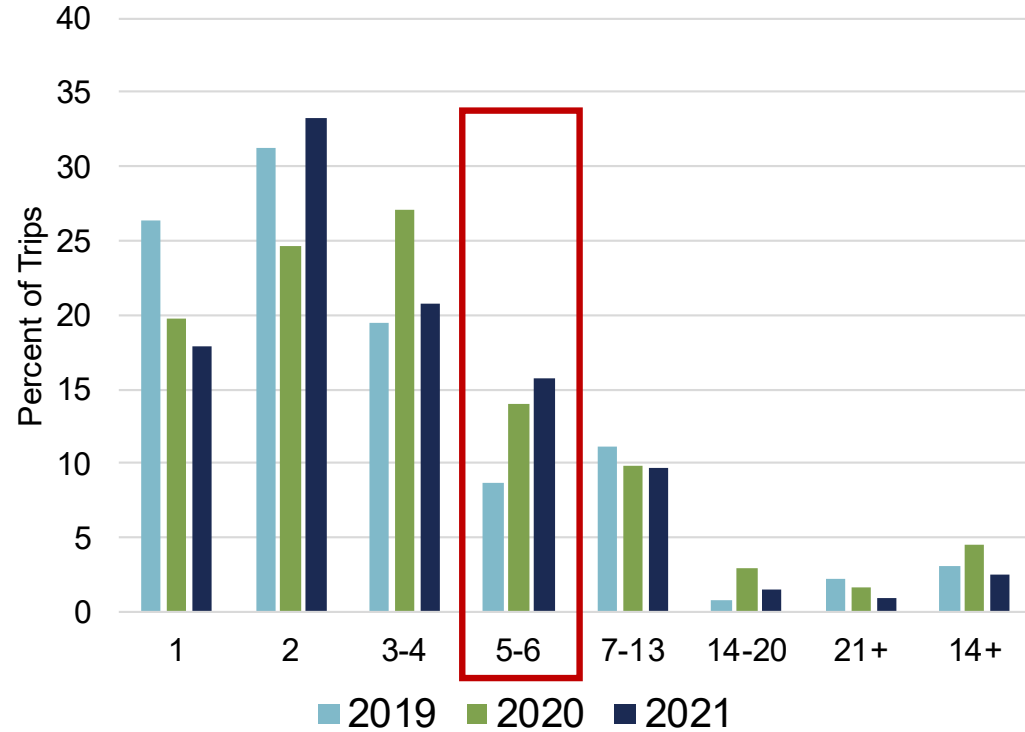
Q2 (April-June)



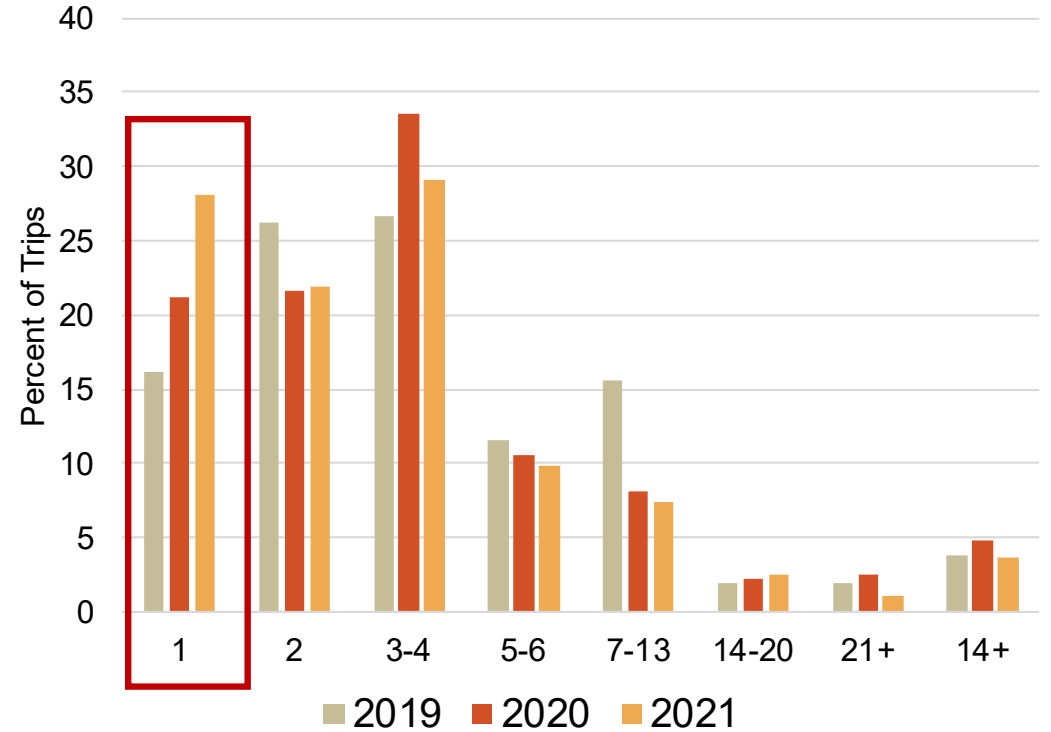
Total Nights Away

Northern Region

Q1 (January-March)



Q2 (April-June)

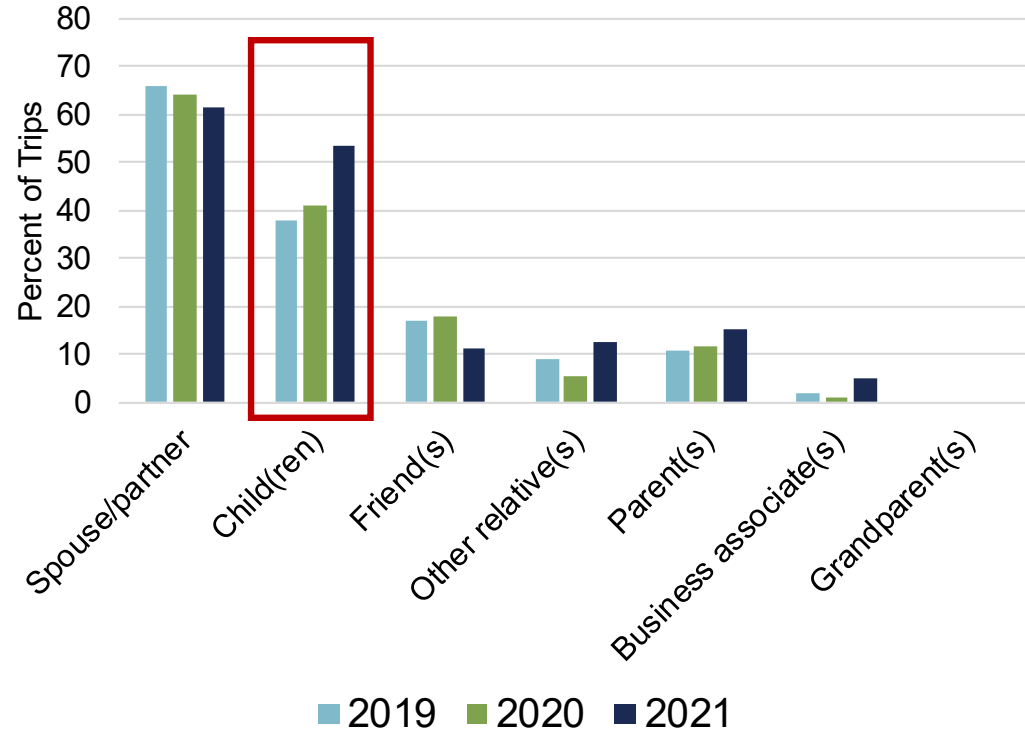


Source: Longwoods International

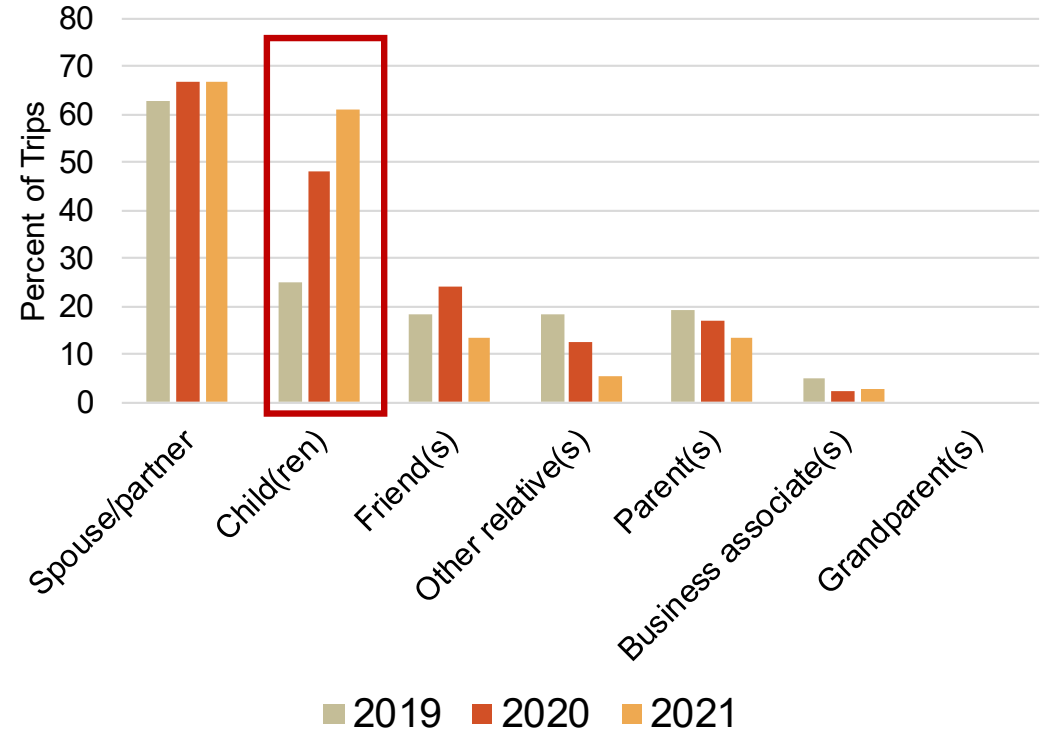
Travel Party Composition

Northern Region

Q1 (January-March)



Q2 (April-June)

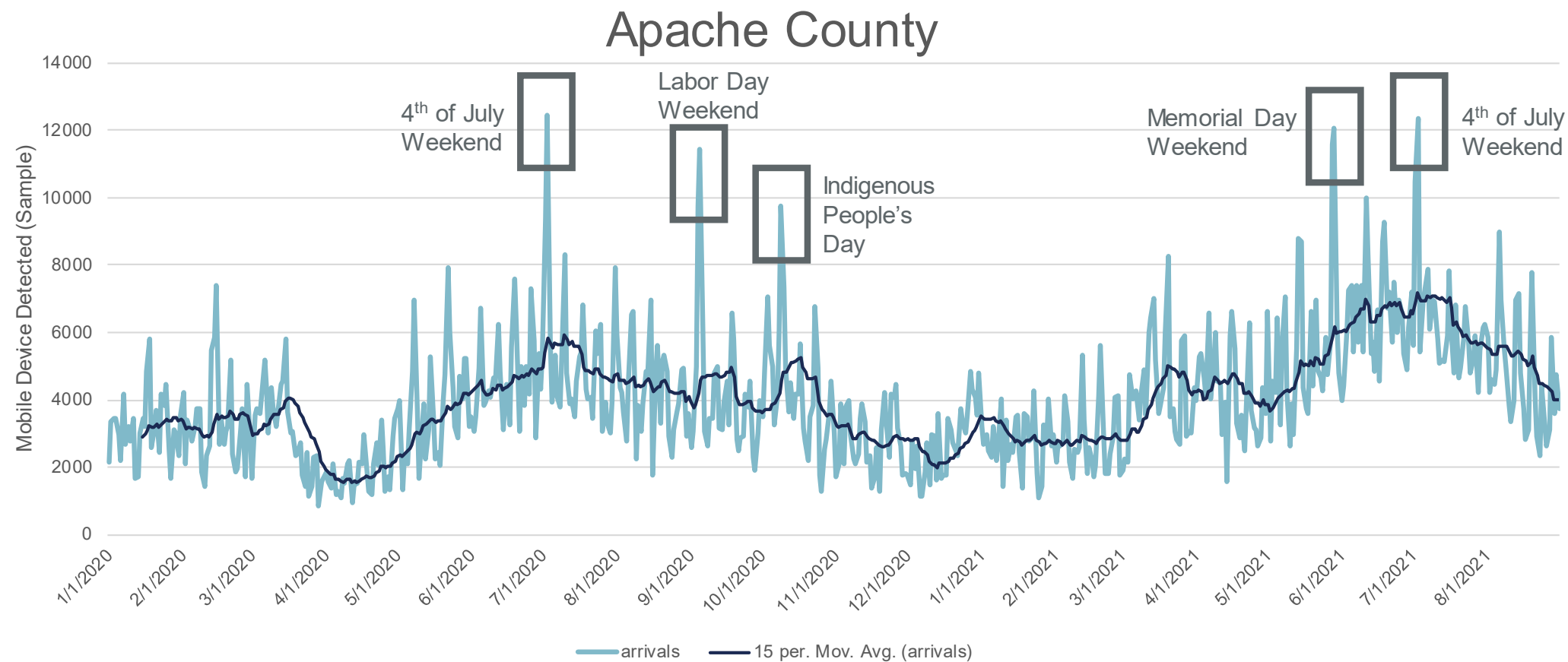


Source: Longwoods International



Arrivalist Apache County

Trips by Arrival County Over Time





Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

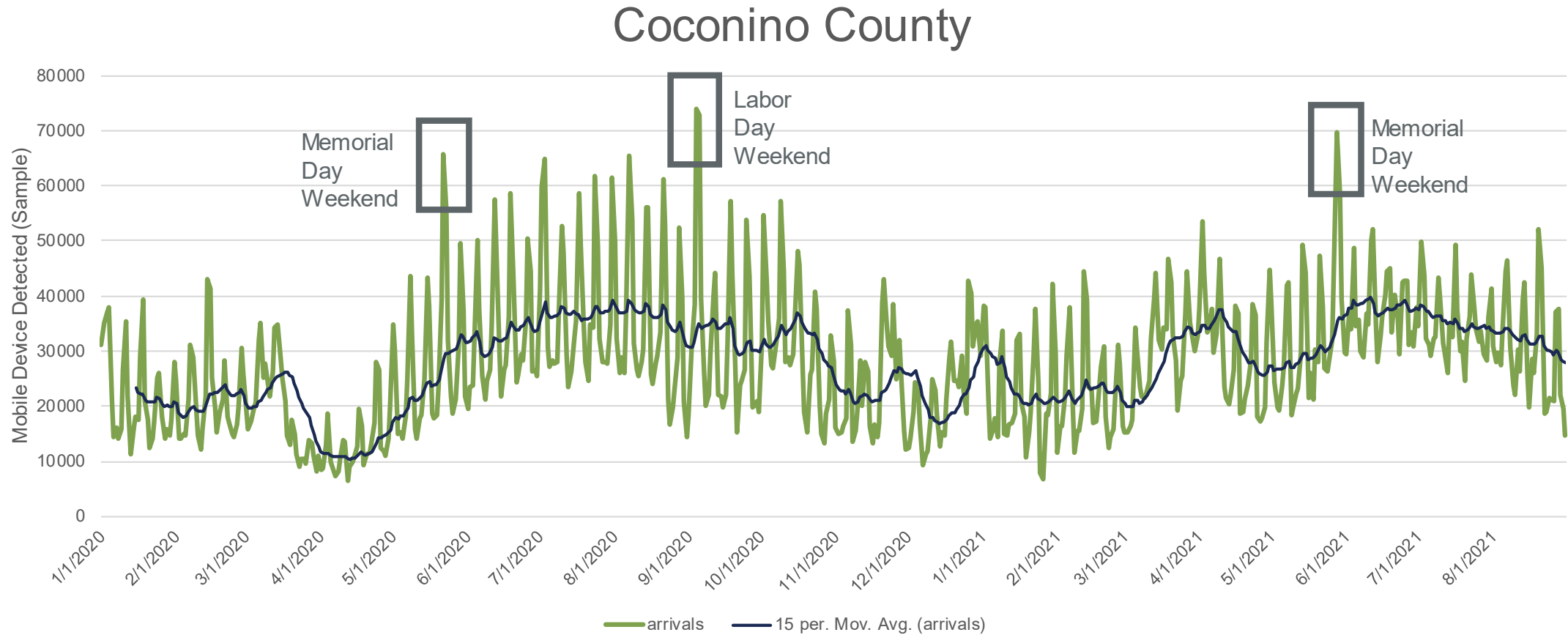
Apache County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	20.9%	23%	2 Days, 1 Hour, 3 Minutes
Los Angeles	12.8%	23%	1 Day, 5 Hours, 52 Minutes
Tucson/Sierra Vista	4.9%	20%	2 Days, 18 Hours, 60 Minutes
Albuquerque/Santa Fe	4.0%	26%	2 Days, 6 Hours, 56 Minutes
Dallas/Fort Worth	2.9%	12%	2 Days, 8 Hours, 50 Minutes
Denver	2.8%	5%	3 Days, 20 Hours, 42 Minutes
Sacramento/Stockton/Modesto	2.8%	17%	1 Day, 18 Hours, 10 Minutes
Salt Lake City	2.8%	14%	2 Days, 10 Hours, 38 Minutes
Las Vegas	2.4%	16%	23 Hours, 52 Minutes
Fresno/Visalia	2.1%	24%	1 Day, 3 Hours, 28 Minutes



Arrivalist Coconino County

Trips by Arrival County Over Time





Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Coconino County

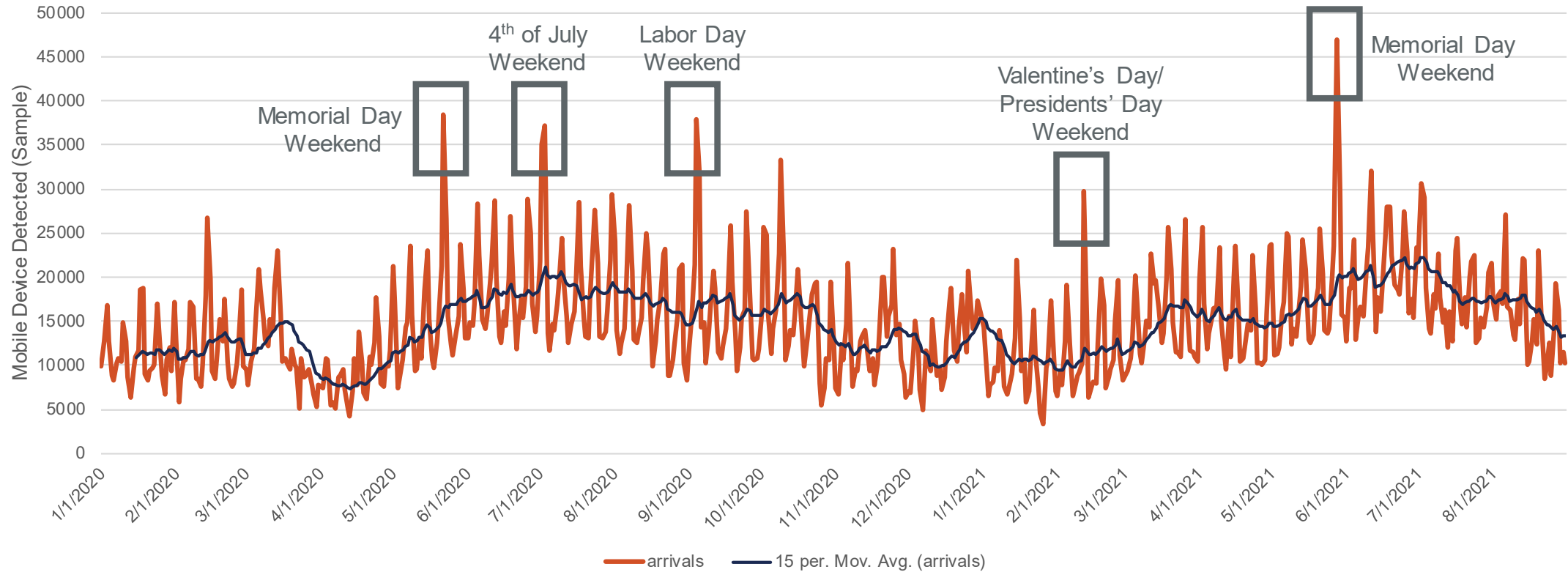
Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	39.6%	45%	2 Days, 44 Minutes
Los Angeles	10.6%	22%	2 Days, 2 Hours, 56 Minutes
Albuquerque/Santa Fe	4.6%	36%	1 Day, 22 Hours, 28 Minutes
Salt Lake City	4.1%	27%	2 Days, 18 Hours, 4 Minutes
Tucson/Sierra Vista	3.4%	26%	2 Days, 12 Hours, 54 Minutes
Las Vegas	2.7%	25%	1 Day, 21 Hours, 24 Minutes
Denver	1.8%	10%	3 Days, 17 Hours, 8 Minutes
San Diego	1.8%	12%	2 Days, 18 Hours, 48 Minutes
San Francisco/Oakland/San Jose	1.4%	8%	2 Days, 12 Hours, 38 Minutes
Sacramento/Stockton/Modesto	1.4%	16%	2 Days, 2 Hours, 48 Minutes



Arrivalist Navajo County

Trips by Arrival County Over Time

Navajo County





Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Navajo County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	23.0%	27%	2 Days, 6 Hours, 9 Minutes
Los Angeles	12.0%	33%	1 Day, 10 Hours, 30 Minutes
Albuquerque/Santa Fe	11.6%	32%	2 Days, 9 Hours, 4 Minutes
Tucson/Sierra Vista	4.4%	24%	2 Days, 23 Hours, 17 Minutes
Denver	2.6%	6%	4 Days, 1 Hour, 42 Minutes
Fresno/Visalia	2.4%	44%	1 Day, 3 Hours, 31 Minutes
Las Vegas	2.3%	27%	1 Day, 6 Hours, 55 Minutes
Dallas/Fort Worth	2.1%	19%	2 Days, 4 Hours, 21 Minutes
Sacramento/Stockton/Modesto	2.0%	23%	1 Day, 14 Hours, 9 Minutes
Salt Lake City	1.6%	11%	2 Days, 20 Hours, 52 Minutes



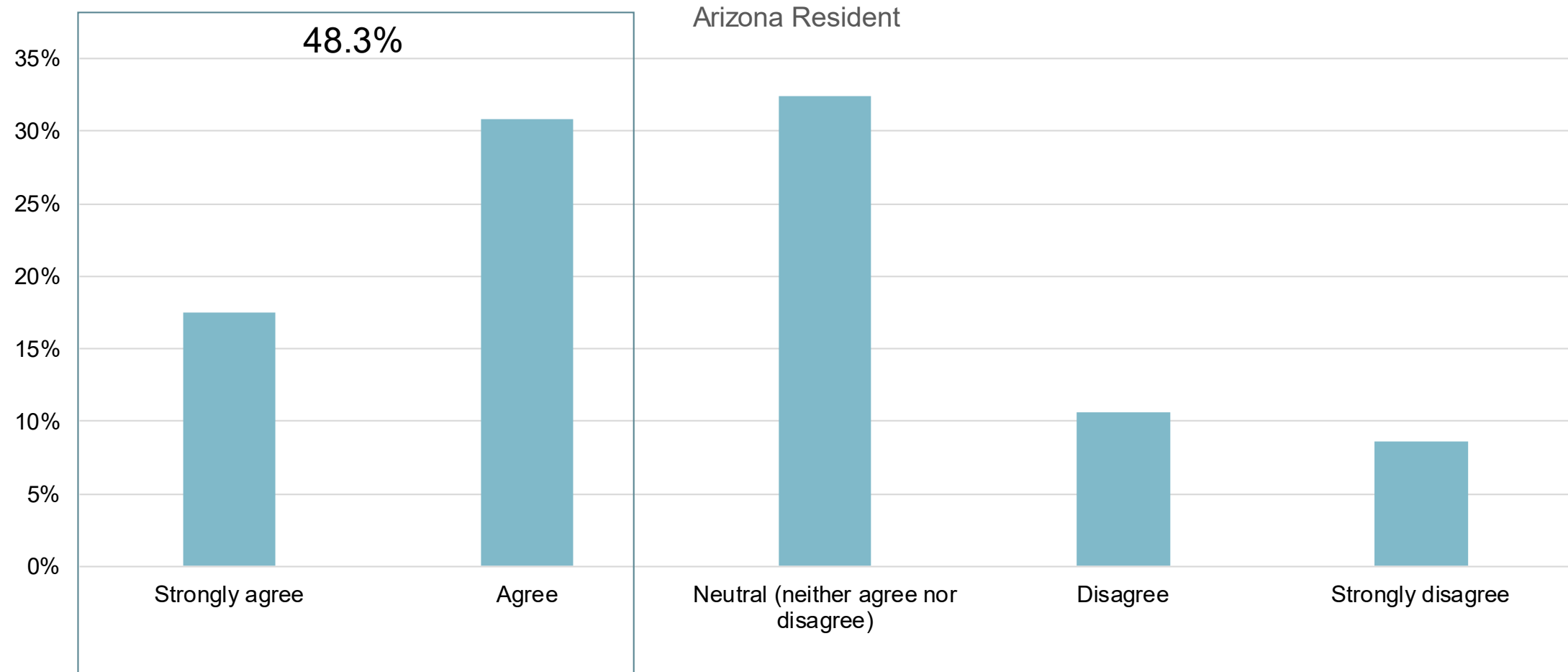
Resident & Traveler Sentiment



Arizona Residents

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

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



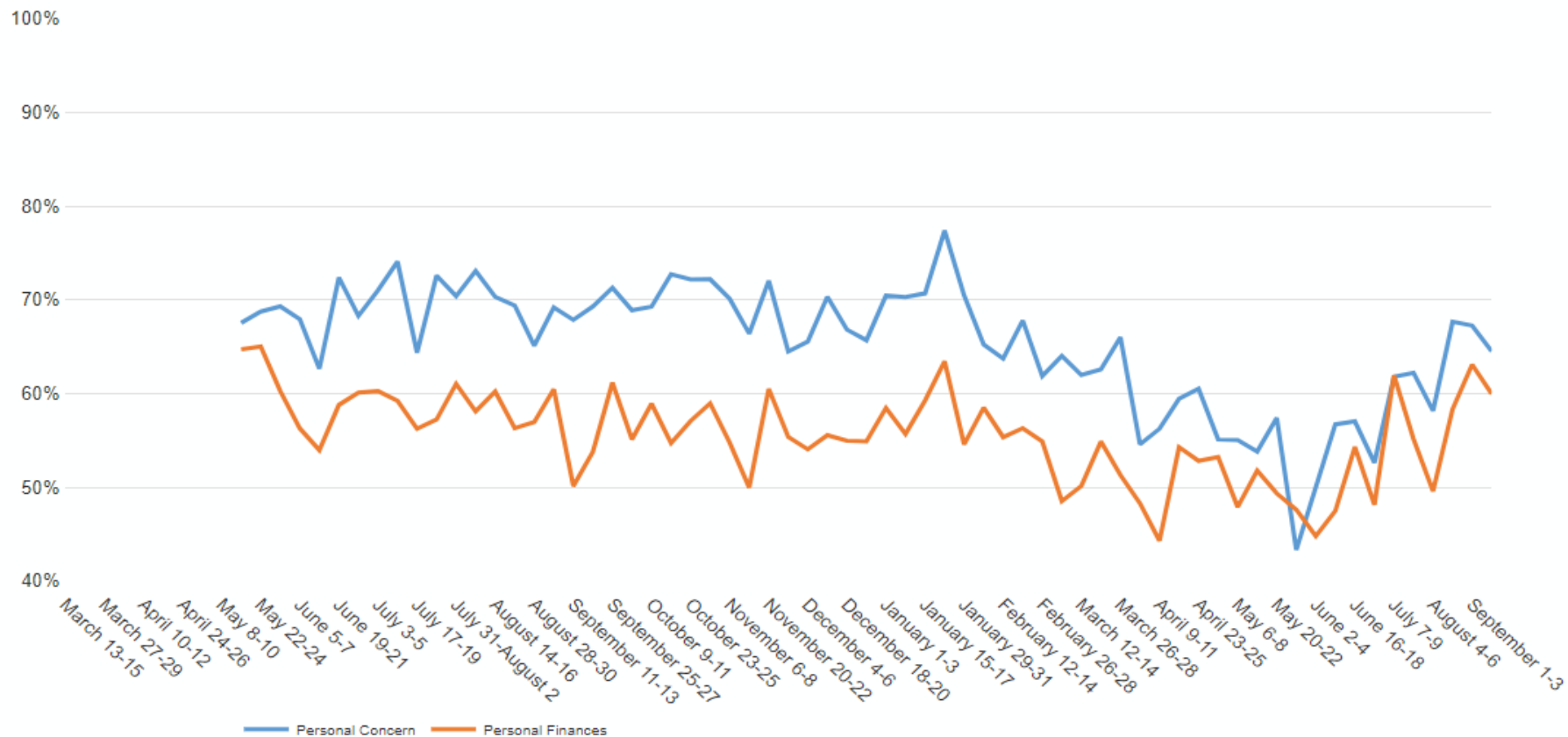


Arizona-Oriented Travelers

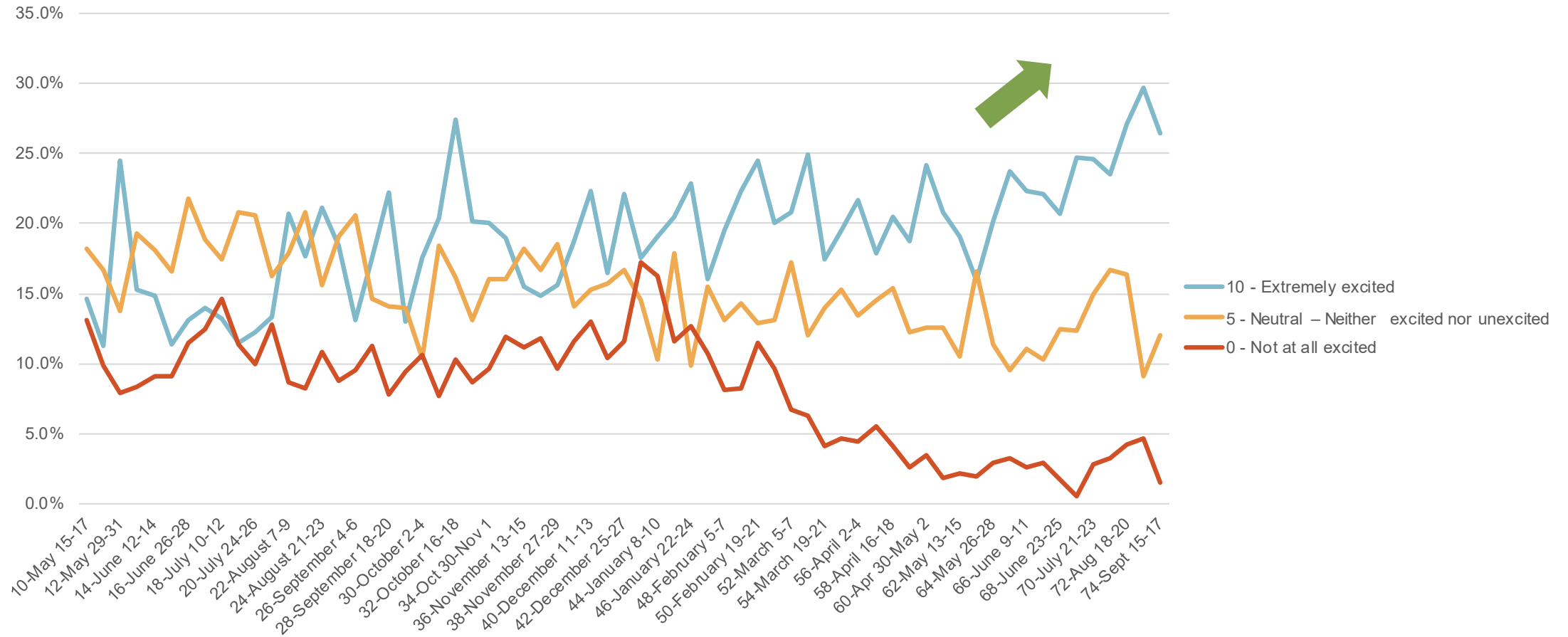
- Domestic American travelers
- March 2020 – September 2021
- 300-400 responses per wave
- Filtered for Arizona-Orientated which includes:
 - Visited Arizona (last 3 years)
 - Likely to Visit Arizona (next 3 years)

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

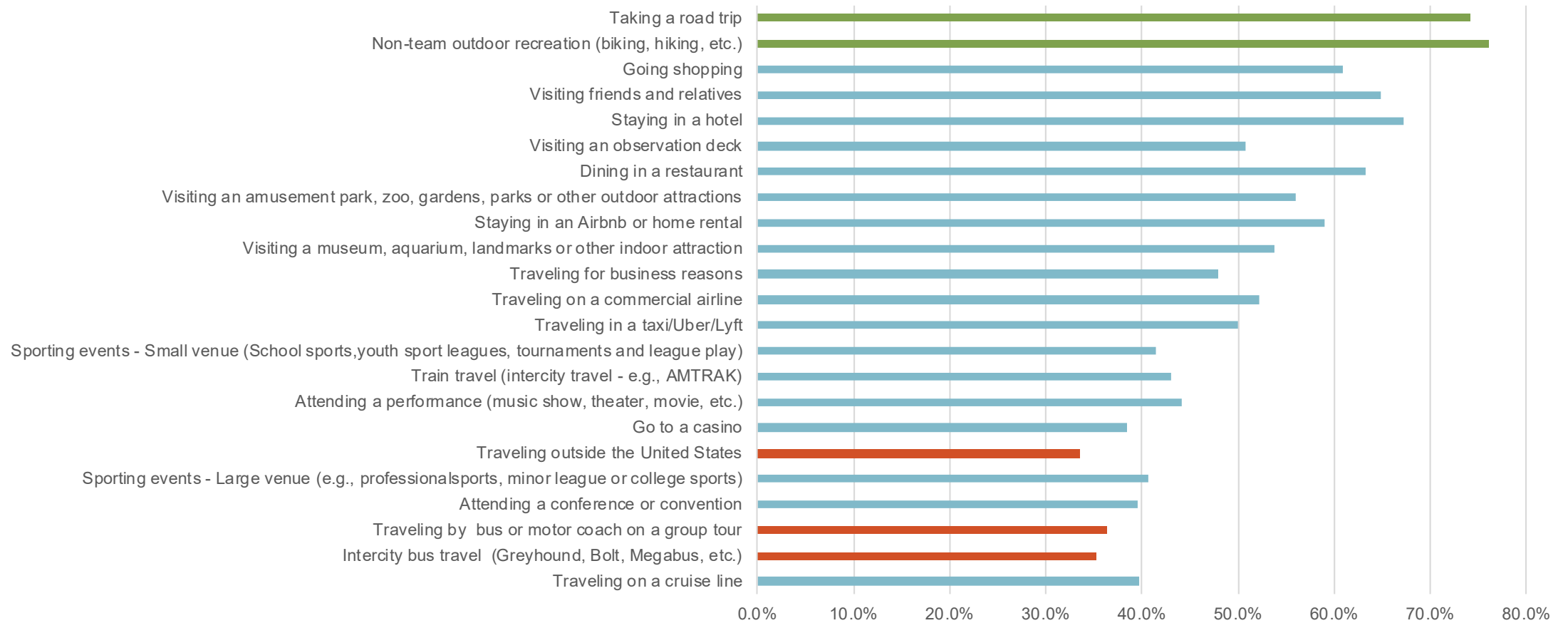
Concern - Time Series



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?



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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Thank you!



Photo credit: Jordyn Walworth