



#### Agenda

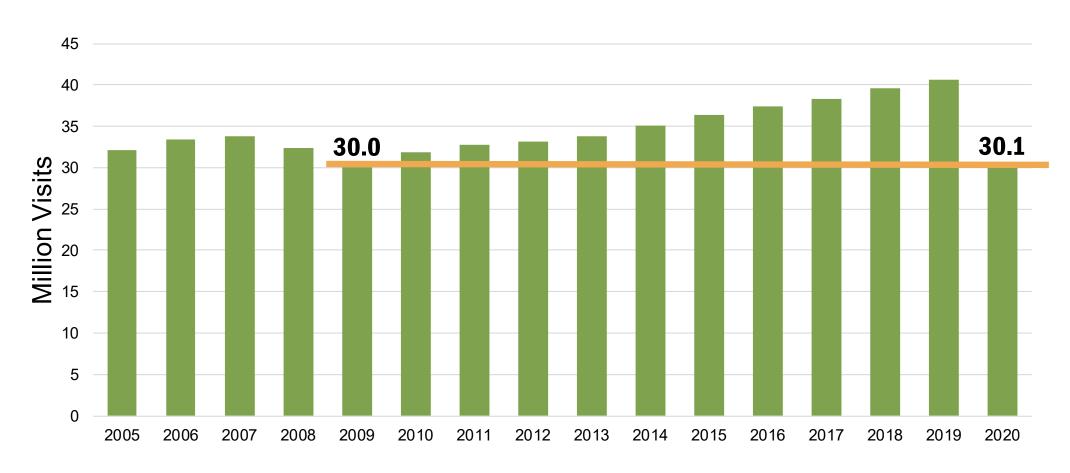
- Statewide Recap and 2021 so far
- Economic Impact of COVID on travel to the Phoenix & Central Region
- 2021 Regional Tourism Indicators
- 2021 Traveler Behaviors
  - Survey Data
  - Mobile Device Location Data
- Resident and Traveler Sentiment







# Domestic Overnight Visitation Arizona



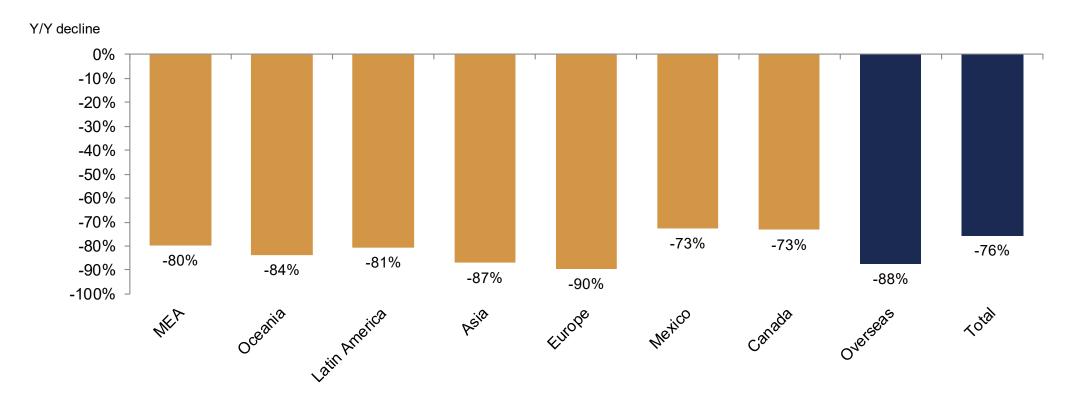




#### International Visitation to Arizona

YOY % Change (2020 v. 2019)

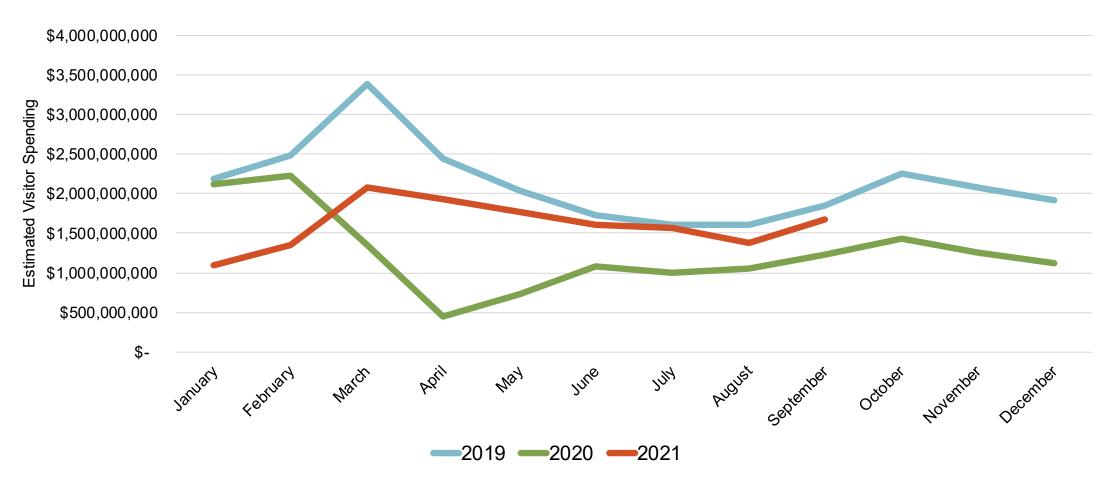
#### Declines in 2020 international visitation to Arizona





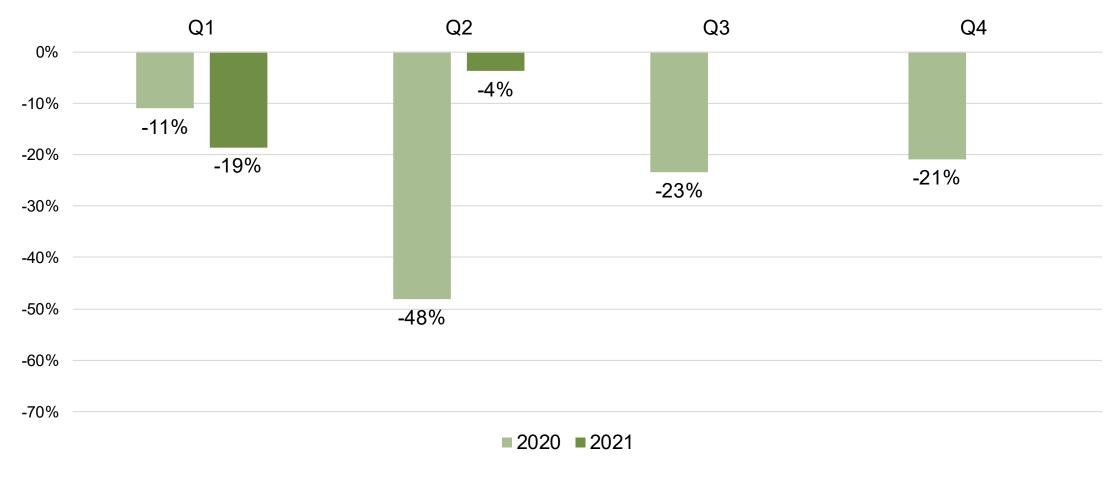


# Travel Spending Trend Arizona



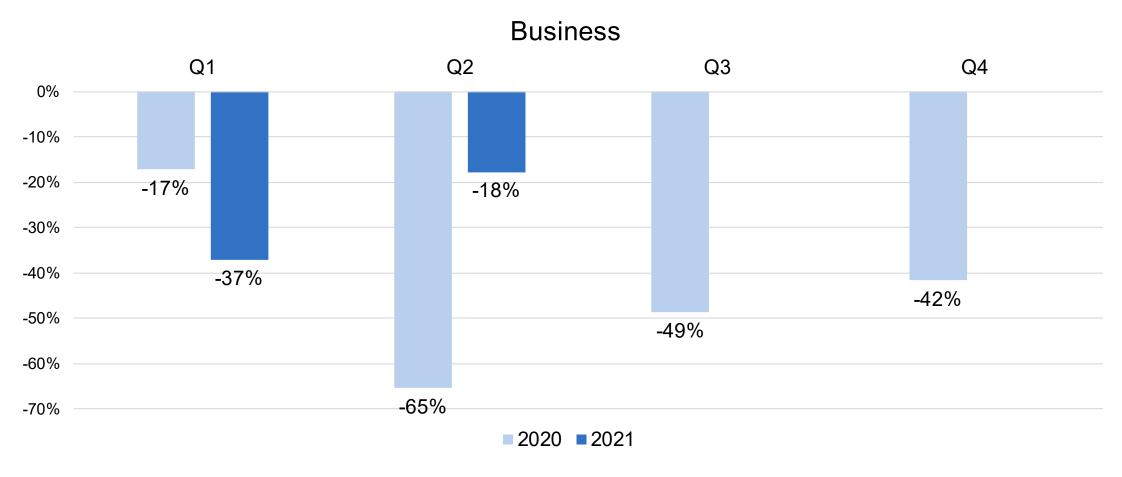






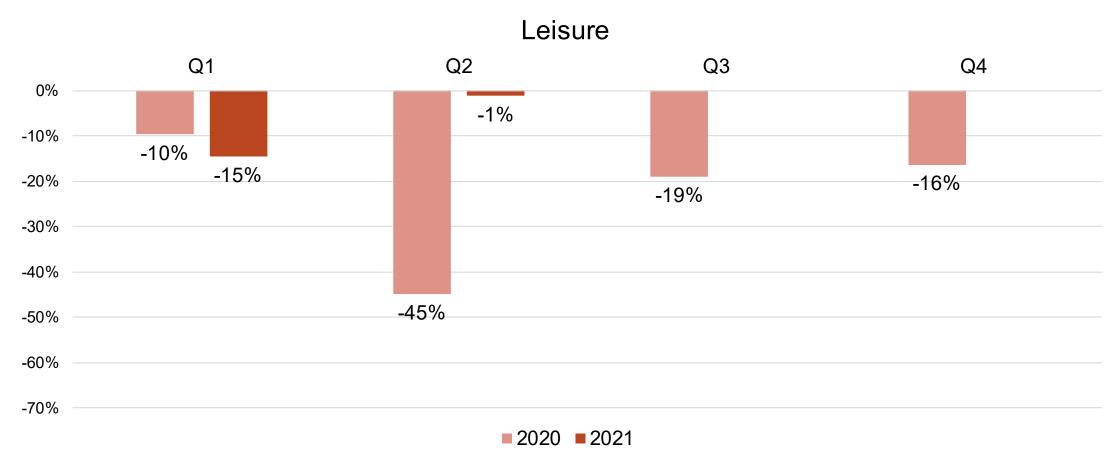






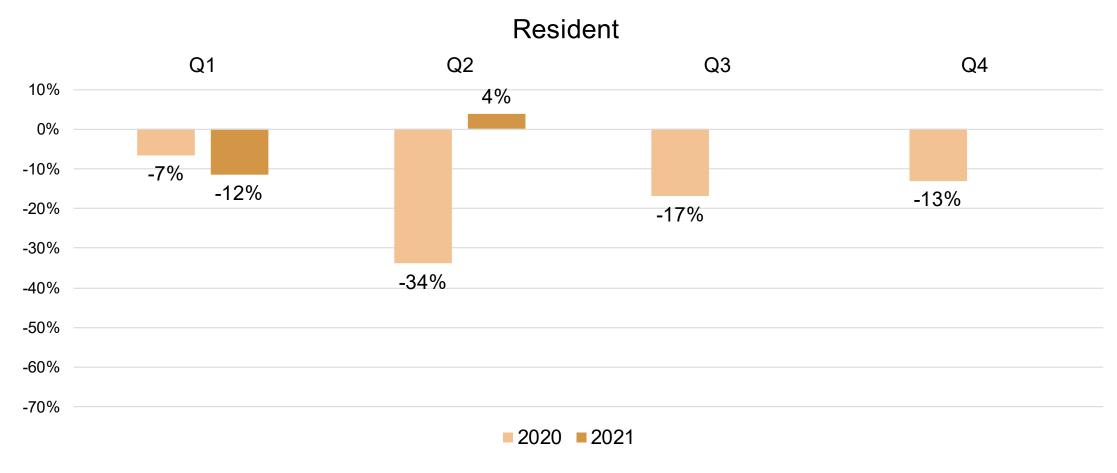








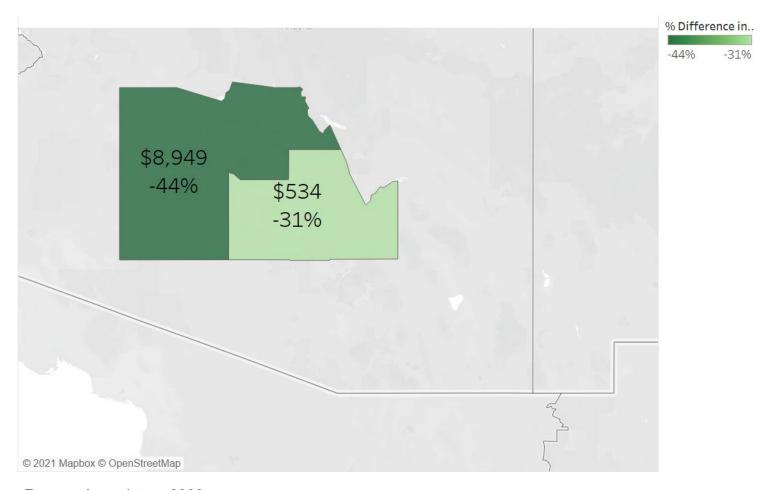






### 2020 Visitor Spending

(\$ Millions and YOY % Change)







### 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

#### **Maricopa County**

**Direct Travel Spending** 

-\$7 Billion -43.9%

Accommodations Spending

-\$996 Million

**Local Tax Receipts** 

-\$276 Million

**Food Service Spending** 

-\$1.1 Billion

**Employment\*** 

-19,830 jobs -18.2%

Earnings\*

-\$712 Million -13.9%

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

\*Employment and Earnings include CARES Act support



### 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

#### **Pinal County**

**Direct Travel Spending** 

-\$241 Million

Accommodations Spending

-\$5.6 Million -8.7% **Local Tax Receipts** 

-\$6.0 Million

**Food Service Spending** 

-\$77 Million

**Employment\*** 

-260 jobs

Earnings\*

+\$8.7 Million +4.4%

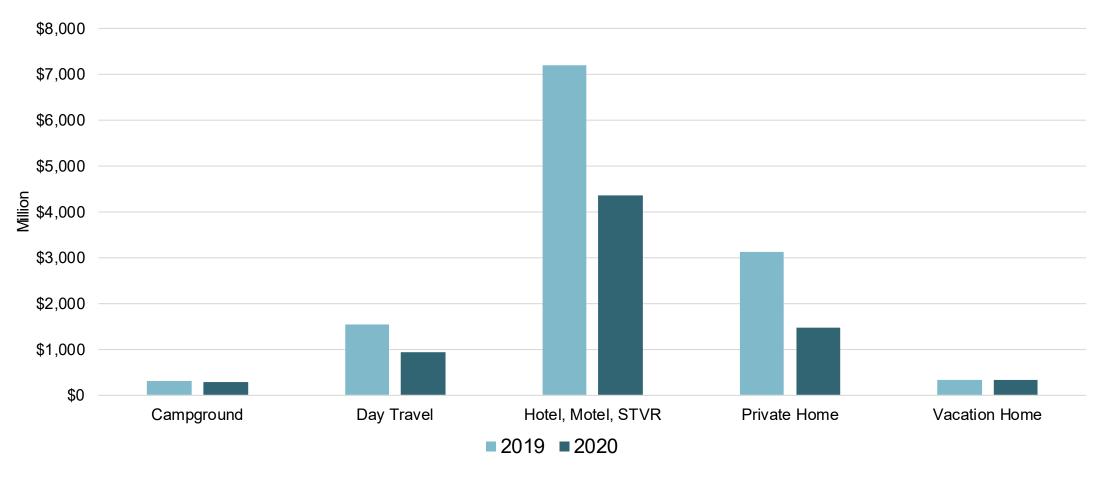
Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p

\*Employment and Earnings include CARES Act support





## Spend by Accommodation Choice Maricopa County



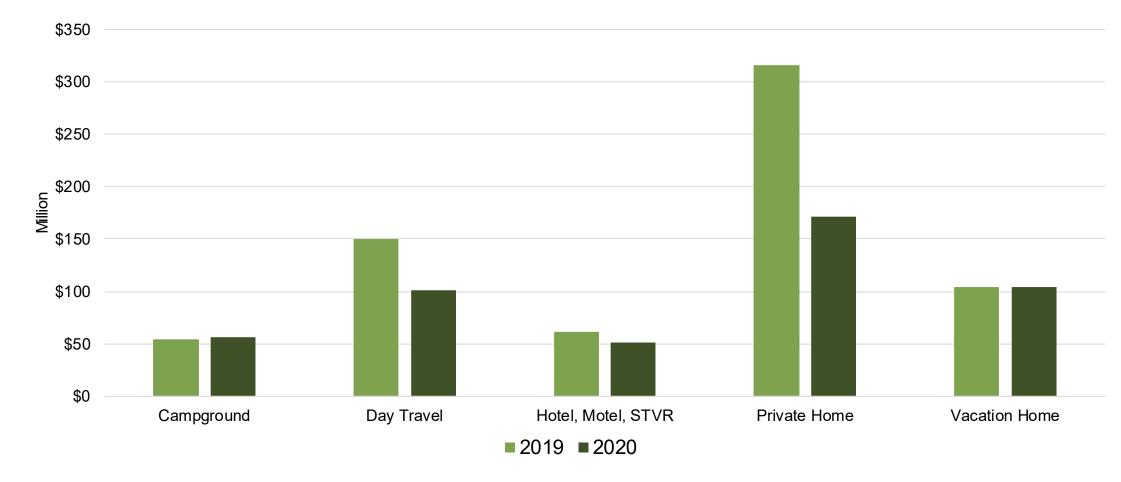
Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p

\*STVR stands for Short-Term Vacation Rental





## Spend by Accommodation Choice Pinal County

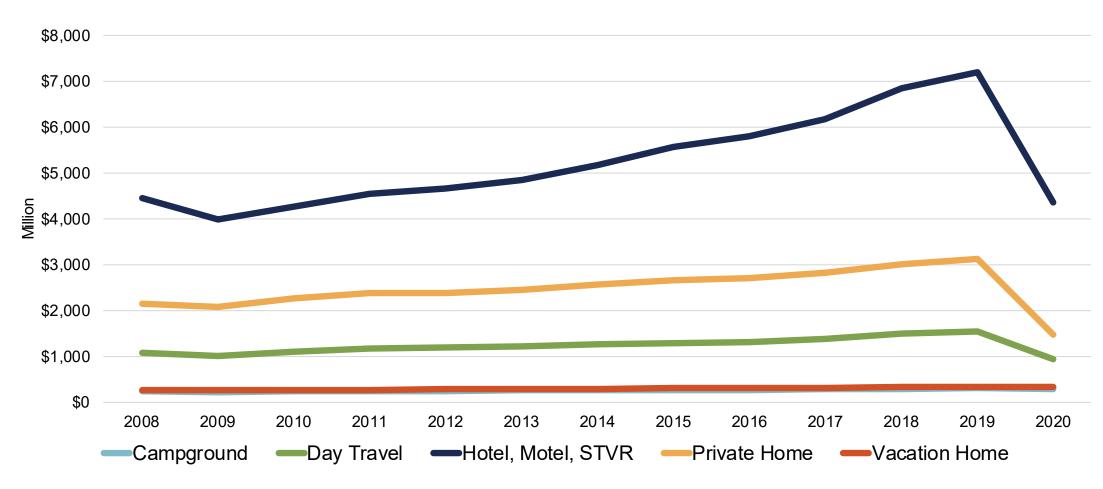


Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p

\*STVR stands for Short-Term Vacation Rental

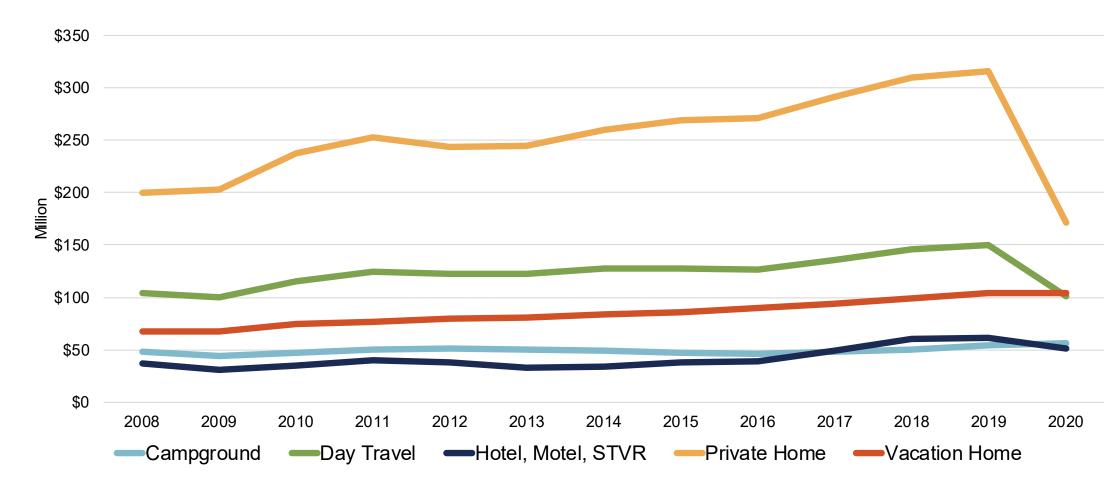


## Spending by Accommodation Choice Trend Maricopa County





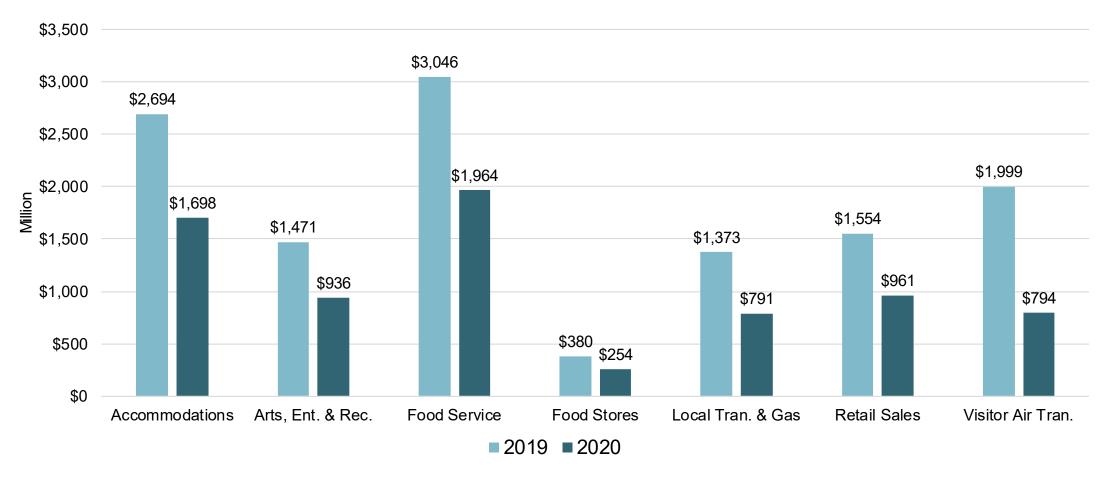
## Spending by Accommodation Choice Trend Pinal County





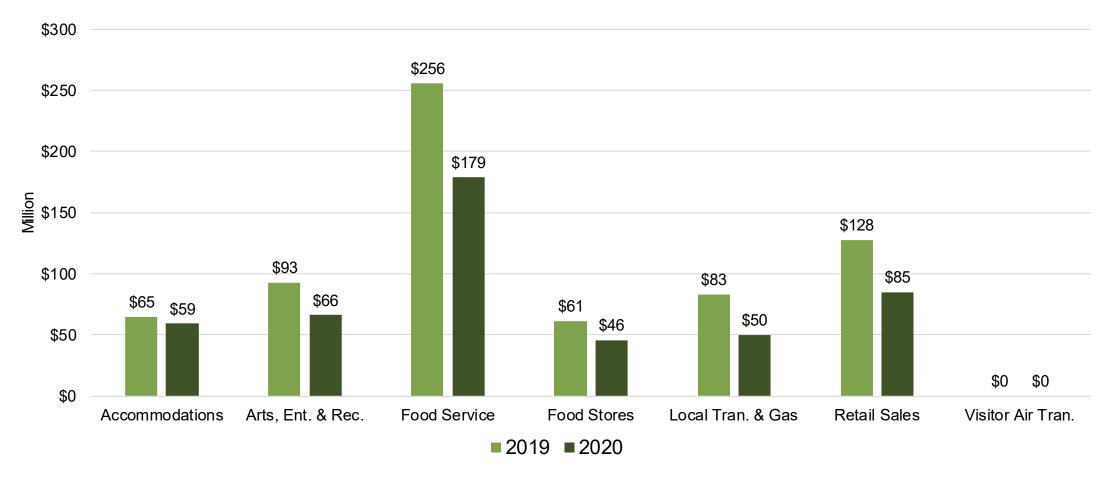


## Spending by Commodity Purchased Maricopa County



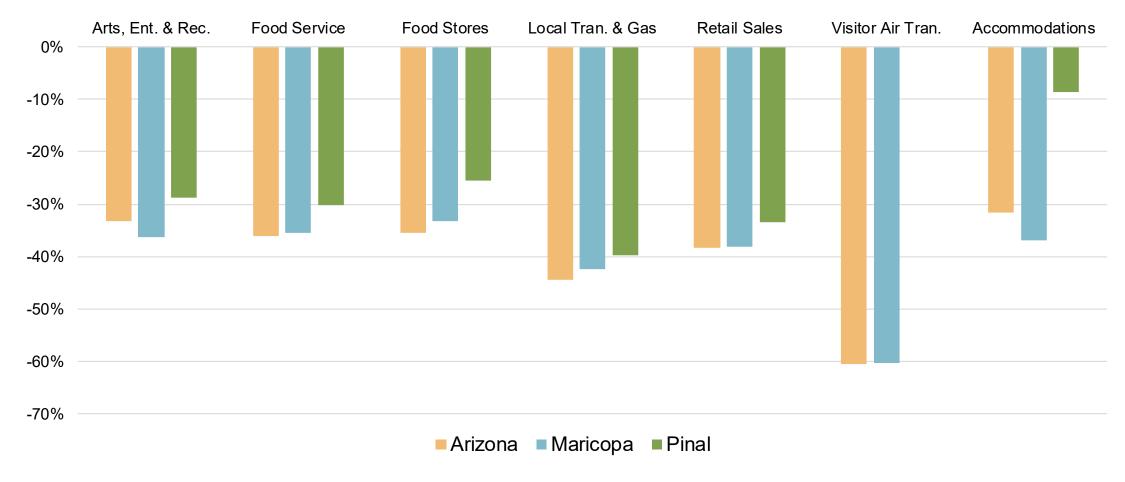


## Spending by Commodity Purchased Pinal County





# Spending by Commodity Purchased % change







### 2021 Tourism Indicators To-Date

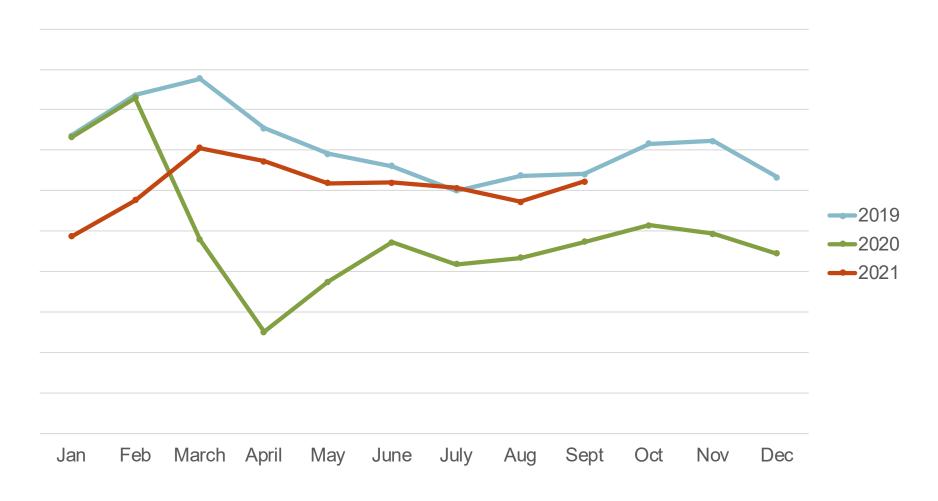
Phoenix & Central Region

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





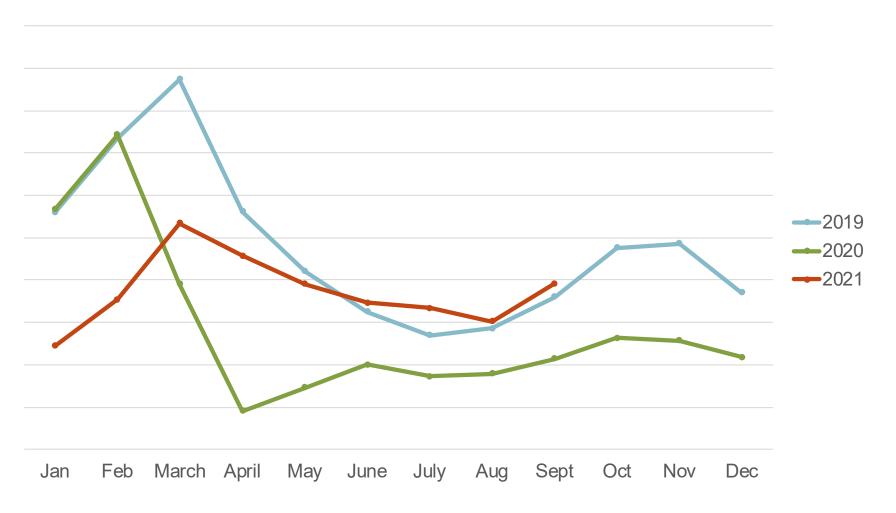
## Lodging Occupancy Maricopa County







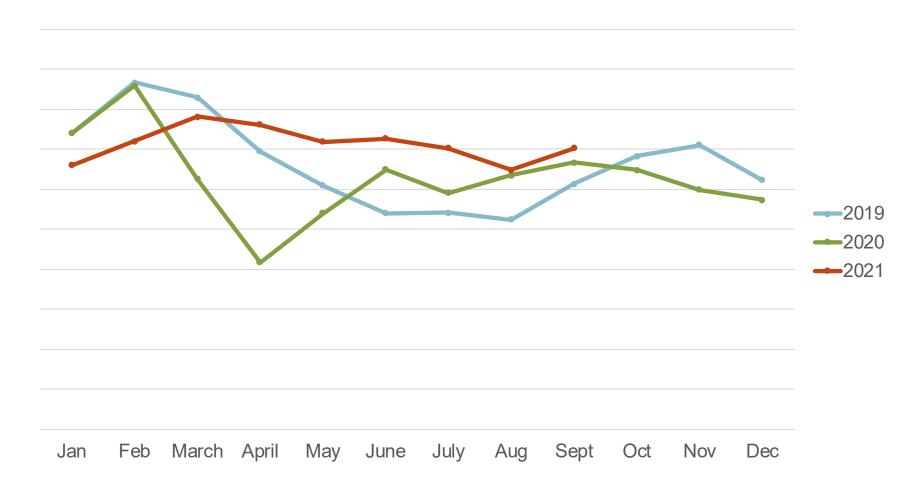
## Lodging RevPAR Maricopa County







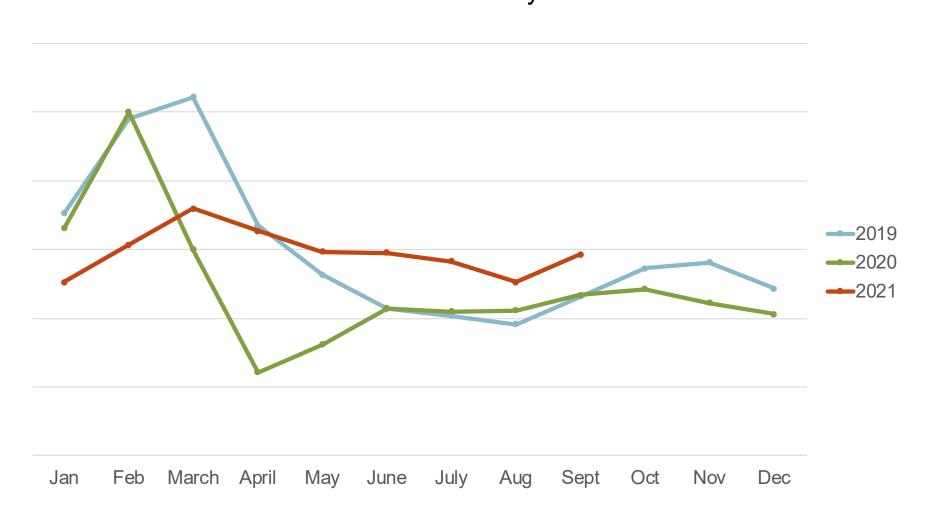
## Lodging Occupancy Pinal County







## Lodging RevPAR Pinal County



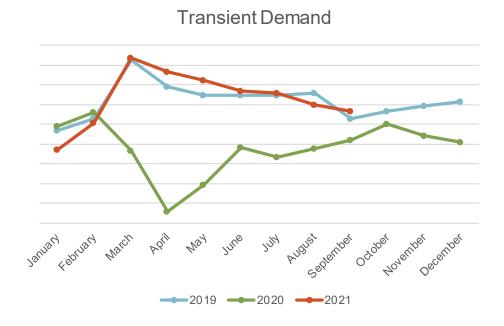




### Lodging Demand - Arizona

Group vs Transient (Luxury & Upper Upscale Properties)

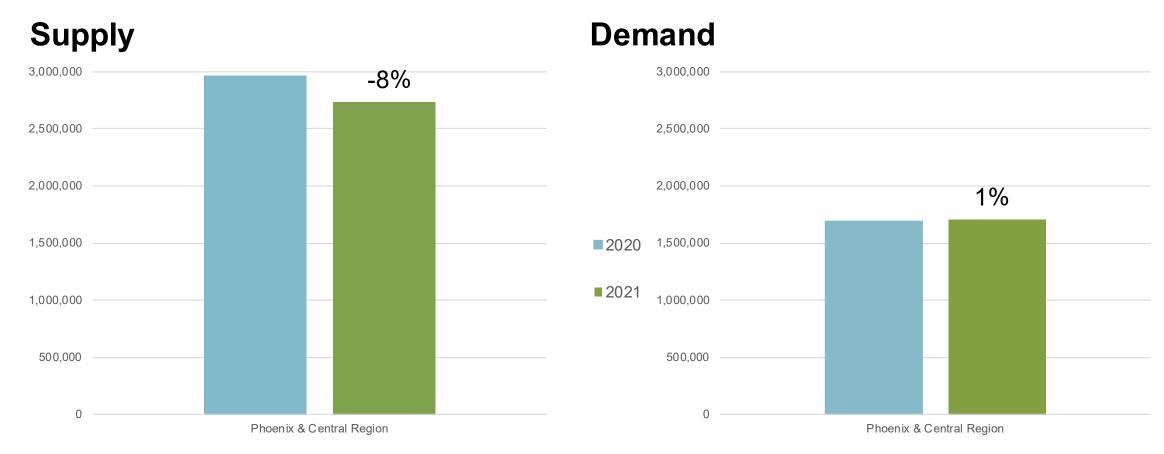








## Airbnb — Phoenix & Central Region YOY % Change

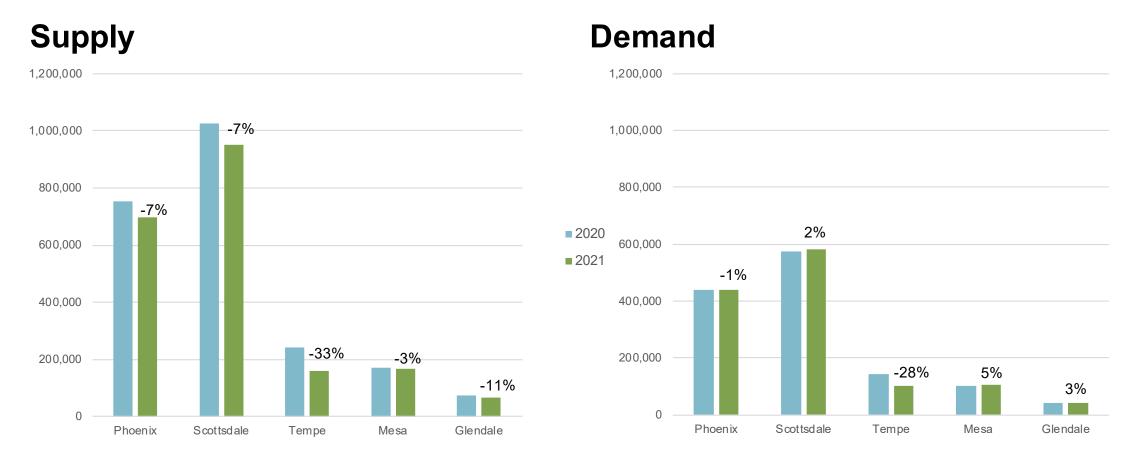


Source: AirDNA

**ARIZONA** 



# Airbnb — City Level YOY % Change



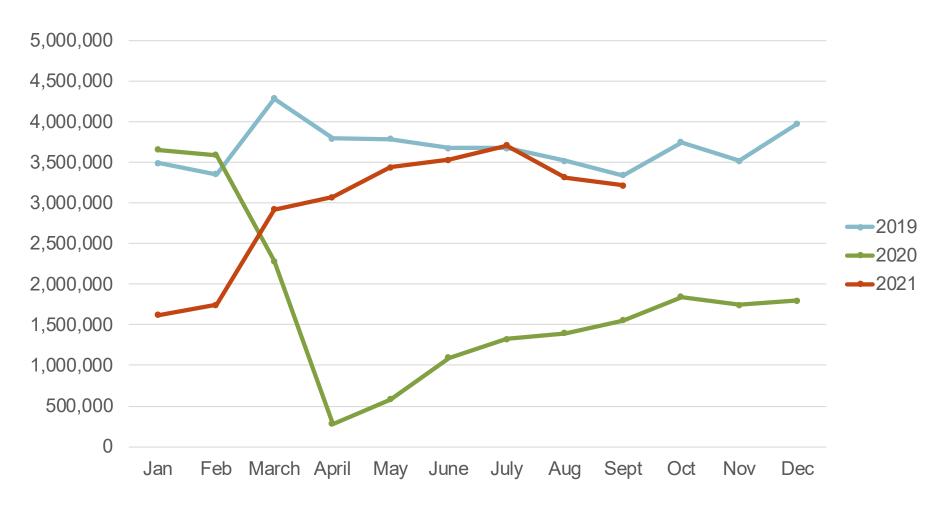
Source: AirDNA





### Airport Passenger Traffic

Phoenix Sky Harbor - Domestic

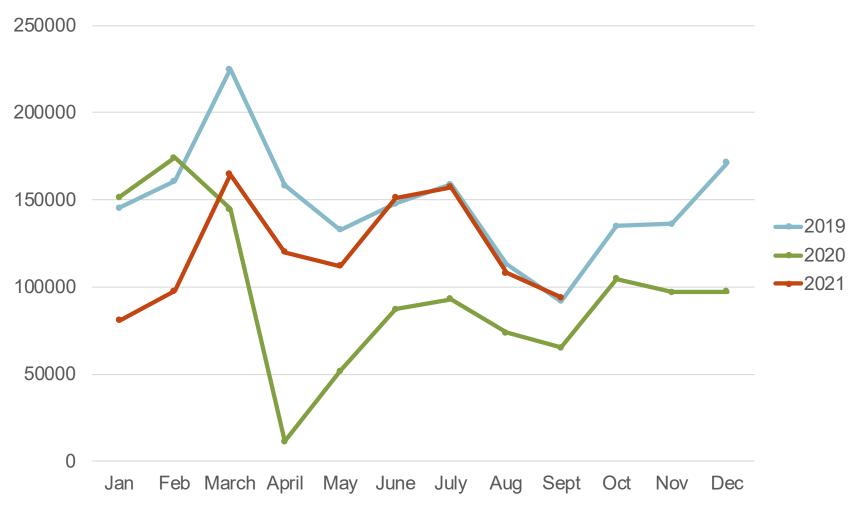






### Airport Passenger Traffic

Phoenix Mesa Gateway Airport



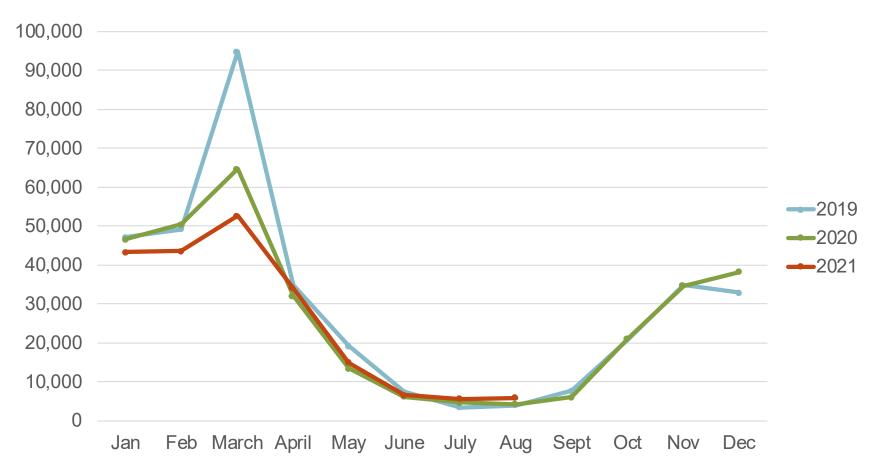






#### State Park Visitation

#### Phoenix & Central Region



Includes: Lost Dutchman SP, McFarland SHP, Oracle SP, Picacho Peak SP

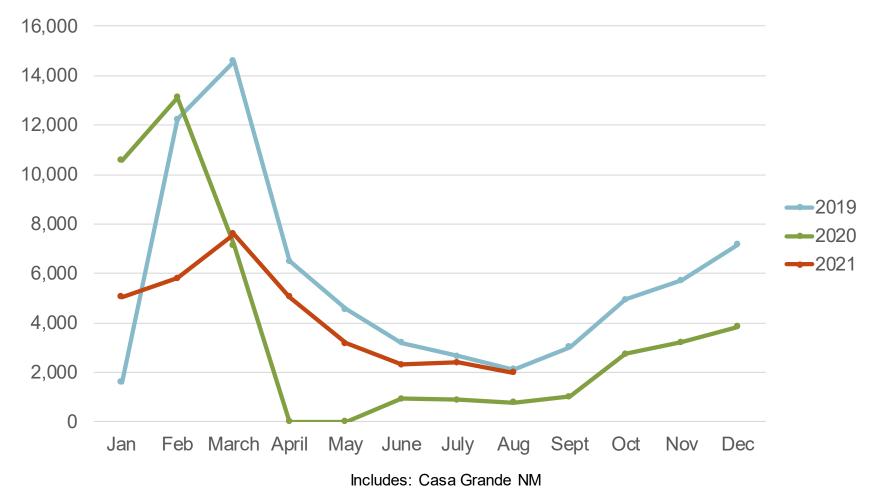
Source: State Park Visitation, Northern Arizona University, Arizona State Parks





#### National Park Visitation

#### Phoenix & Central Region









### 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.

ARIZONA



**Brochure** 

**Posters** 

Social Media Assets

**Talking Points** 

**Digital Courses** 

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

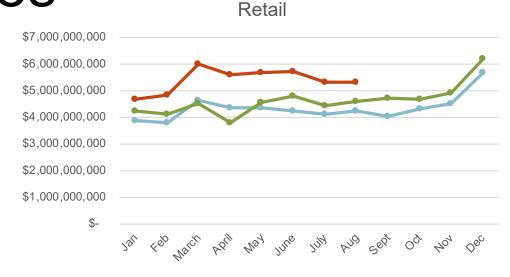




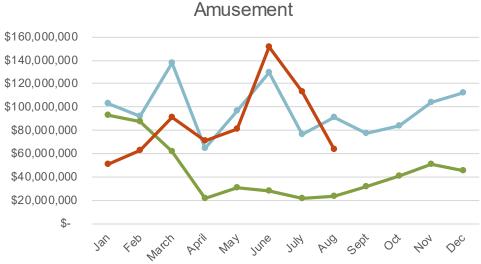
#### **Gross Sales**











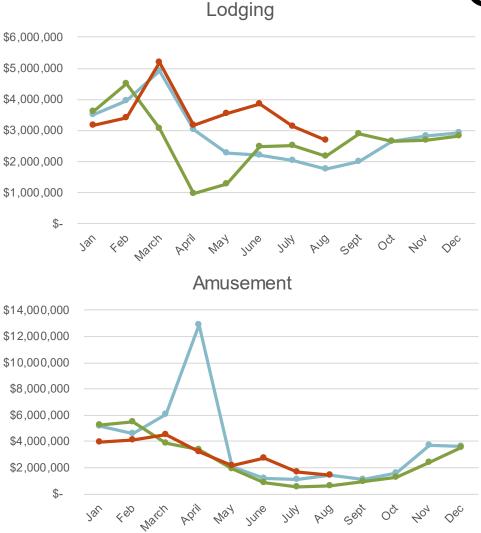


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue





**Gross Sales** 

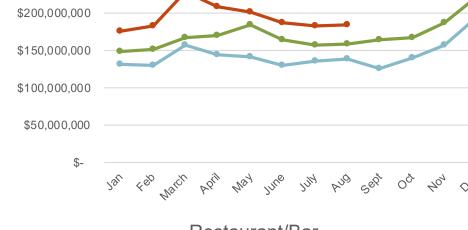




---2019 ---2020

<del>---</del>2021

\$250,000,000



Retail



Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

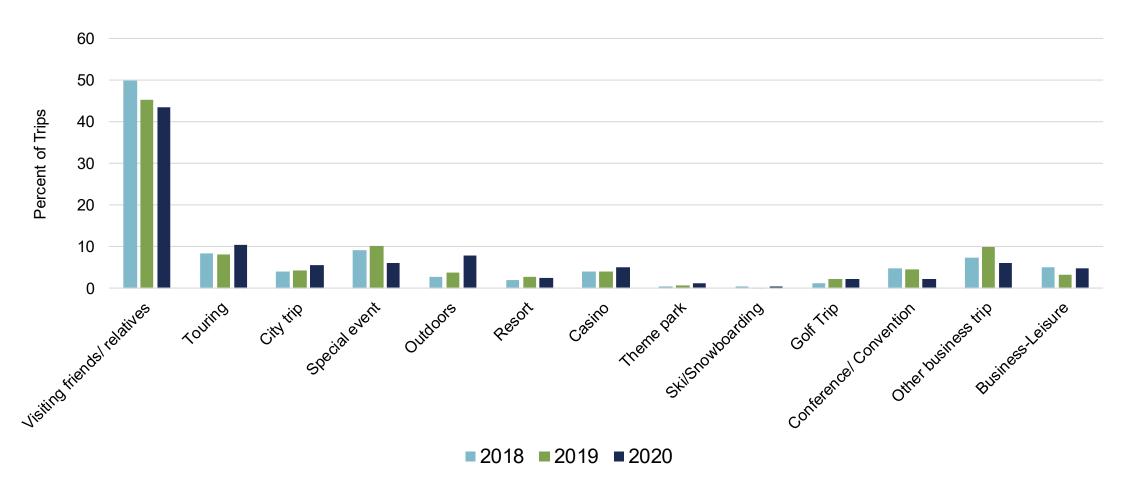


### **Traveler Behaviors**





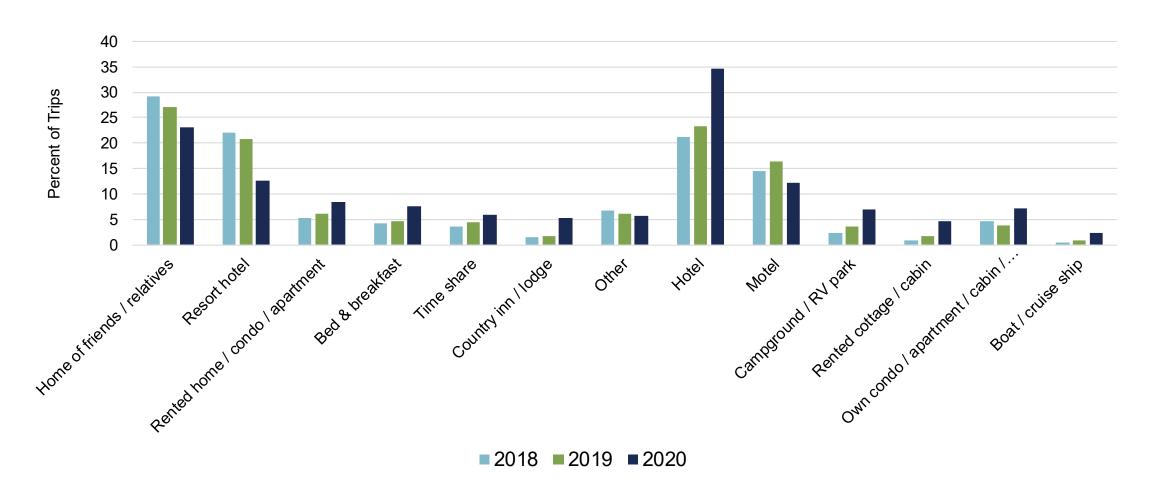
### Main Purpose of Trip Trend







#### **Accommodation Choice Trend**





## Top Origin Markets Phoenix & Central Region

DMA	Percent of Trips in 2018
Phoenix, AZ	14
Los Angeles, CA	9
Tucson (Nogales), AZ	8
Chicago, IL	5
Denver, CO	4
Las Vegas, NV	4
San Diego, CA	4
New York, NY	3
Albuquerque-Santa Fe, NM	2
Sacramento-Stockton- Modesto, CA	2

DMA	Percent of Trips in 2019
Phoenix, AZ	16
Los Angeles, CA	11
Tucson (Nogales), AZ	7
Chicago, IL	4
Las Vegas, NV	3
Denver, CO	3
San Francisco-Oakland-San Jose, CA	3
San Diego, CA	3
Seattle-Tacoma, WA	2
Albuquerque-Santa Fe, NM	2

DMA	Percent of Trips in 2020
Phoenix, AZ	18
Los Angeles, CA	12
Tucson (Nogales), AZ	6
Chicago, IL	4
Las Vegas, NV	4
San Diego, CA	3
New York, NY	3
Denver, CO	3
Seattle-Tacoma, WA	2
Salt Lake City, ID/UT	2

Source: Longwoods International





## Top Origin Markets 2021

DMA	Percent of Trips in Q1 2021
Phoenix, AZ	22
Los Angeles, CA	8
Tucson (Nogales), AZ	8
Chicago, IL	6
Albuquerque-Santa Fe, NM	4
San Diego, CA	3
Minneapolis-St. Paul, MN	3
Houston, TX	3
Orlando-Daytona Beach-Melbrn, FL	2
Sacramento-Stockton-Modesto, CA	2

DMA	Percent of Trips in Q2 2021
Los Angeles, CA	16
Phoenix, AZ	12
Tucson (Nogales), AZ	11
Chicago, IL	6
New York, NY	3
Kansas City, KS	2
Denver, CO	2
Salt Lake City, ID/UT	2
Seattle-Tacoma, WA	2
Houston, TX	2

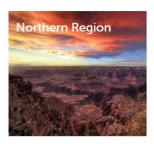
Source: Longwoods International





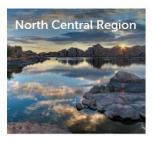
## 2020 Visitor profile









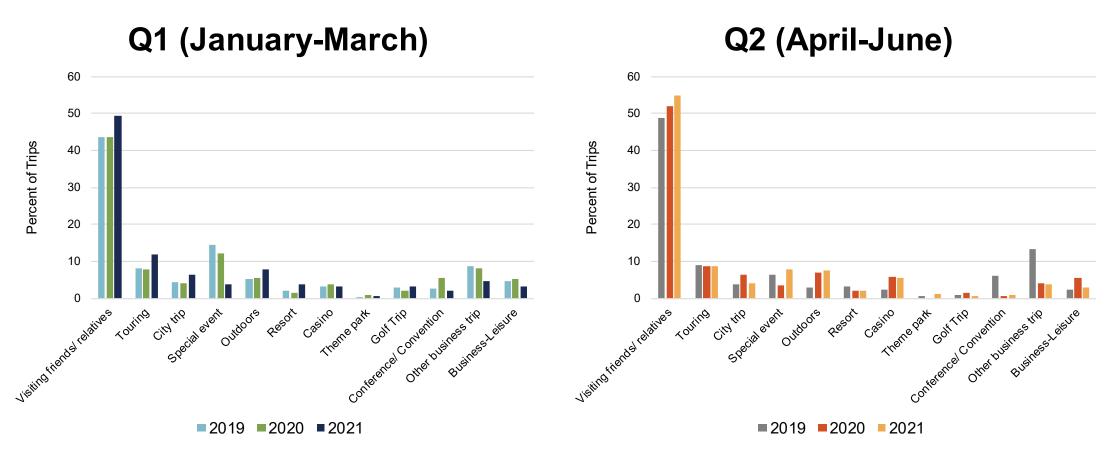


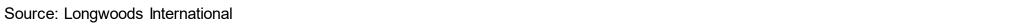






### Main Purpose of Trip

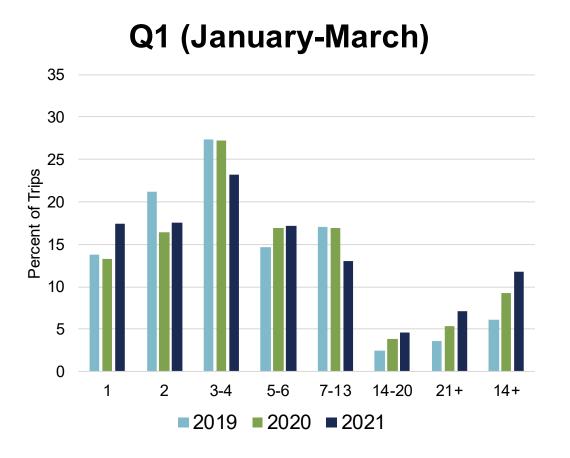


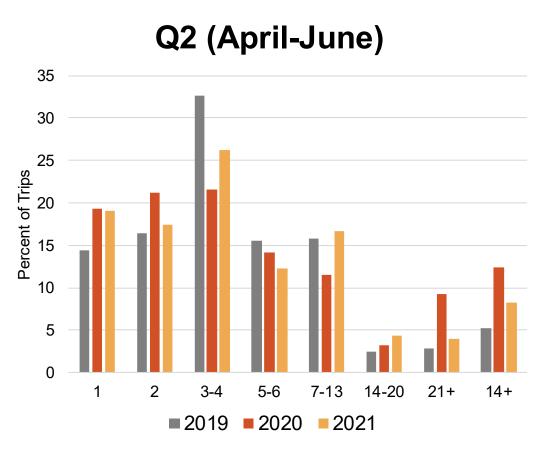


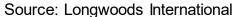




## **Total Nights Away**



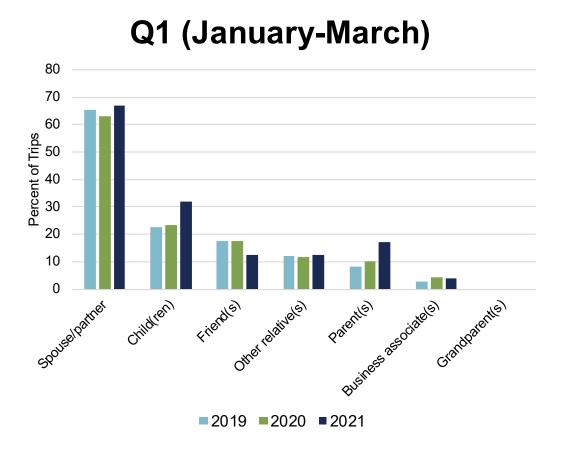


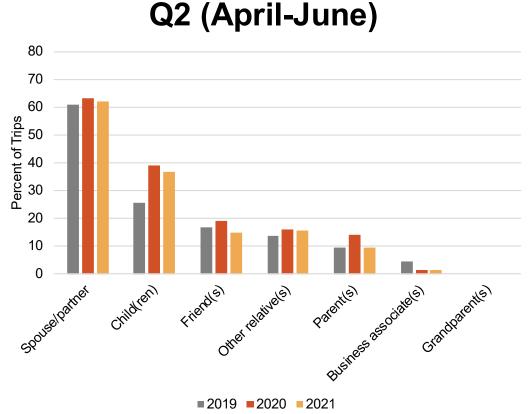


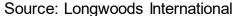




### **Travel Party Composition**

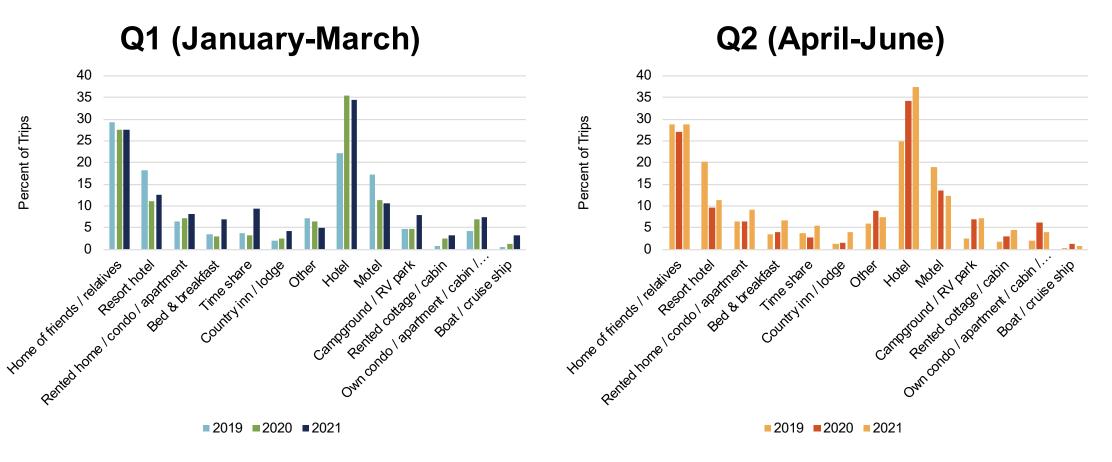


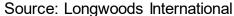






#### Accommodation

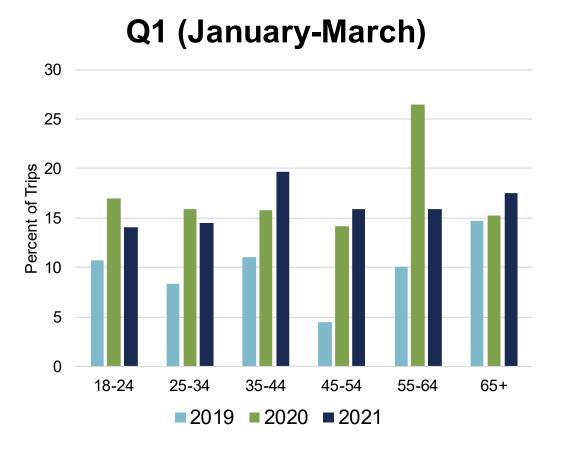


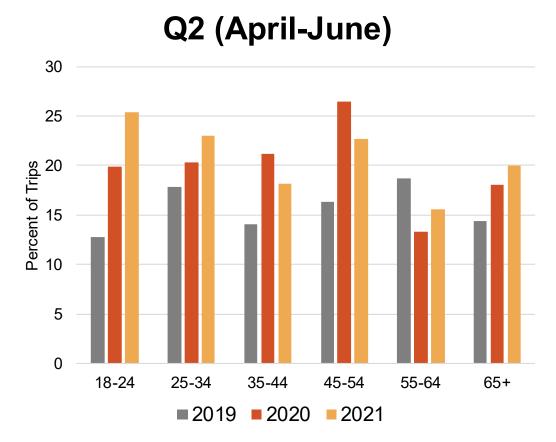






## Age Phoenix & Central Region





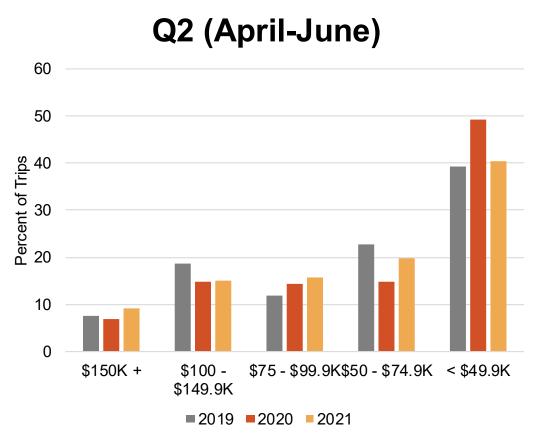
Source: Longwoods International

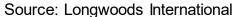




#### Household Income











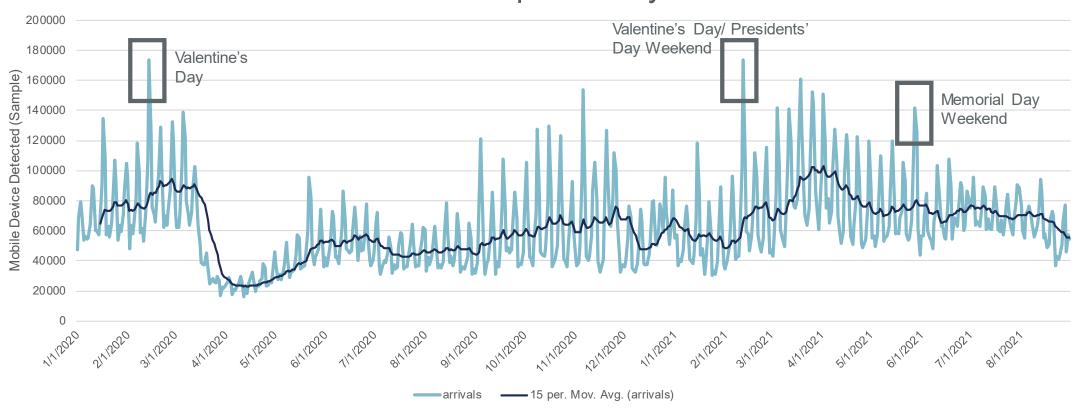
## Maricopa County





## Trips by Arrival County Over Time

#### Maricopa County







## Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Maricopa County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Los Angeles	13.0%	27%	2 Days, 16 Hours
Phoenix	7.7%	43%	1 Day, 23 Hours, 13 Minutes
Tucson/Sierra Vista	6.6%	36%	2 Days, 38 Minutes
Seattle/Tacoma	4.0%	21%	4 Days, 5 Hours, 32 Minutes
Denver	3.9%	21%	3 Days, 17 Hours, 20 Minutes
Chicago	3.8%	16%	4 Days, 7 Hours, 26 Minutes
San Diego	3.3%	27%	2 Days, 23 Hours, 56 Minutes
San Francisco/Oakland/San Jose	3.3%	24%	3 Days, 6 Hours, 29 Minutes
Albuquerque/Santa Fe	3.1%	31%	2 Days, 22 Hours, 36 Minutes
Minneapolis/Saint Paul	2.8%	15%	4 Days, 11 Hours, 32 Minutes

Source: Arrivalist





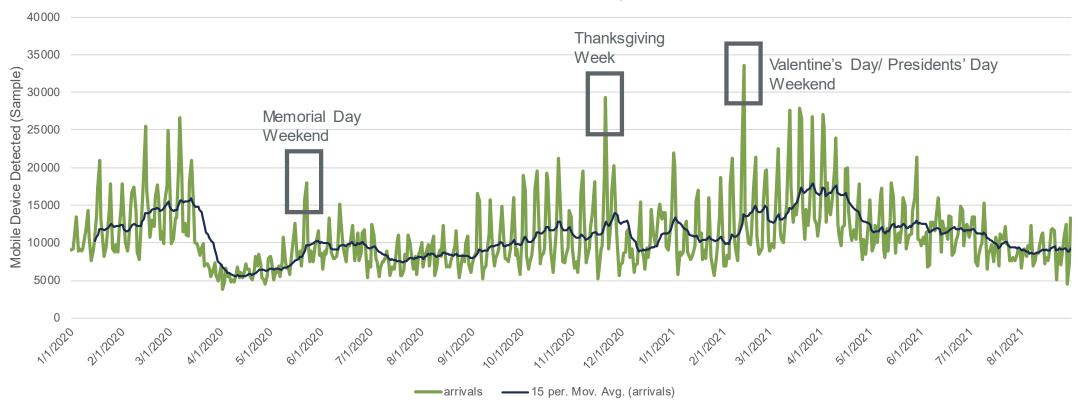
## Pinal County





## Trips by Arrival County Over Time









## Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

**Pinal County** 

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Los Angeles	12.9%	28%	2 Days, 11 Hours, 47 Minutes
Phoenix	7.6%	17%	2 Days, 8 Hours, 28 Minutes
Tucson/Sierra Vista	4.9%	16%	2 Days, 14 Hours, 15 Minutes
Minneapolis/Saint Paul	4.0%	9%	5 Days, 5 Hours, 53 Minutes
Salt Lake City	3.8%	16%	3 Days, 16 Hours, 32 Minutes
Seattle/Tacoma	3.4%	8%	5 Days, 2 Hours, 8 Minutes
Chicago	3.3%	8%	5 Days, 1 Hour, 34 Minutes
Denver	3.0%	11%	4 Days, 11 Hours, 21 Minutes
El Paso	2.8%	30%	2 Days, 7 Hours, 42 Minutes
San Diego	2.6%	17%	3 Days, 4 Hours, 32 Minutes
e: Arrivalist			

Source: Arrivalist







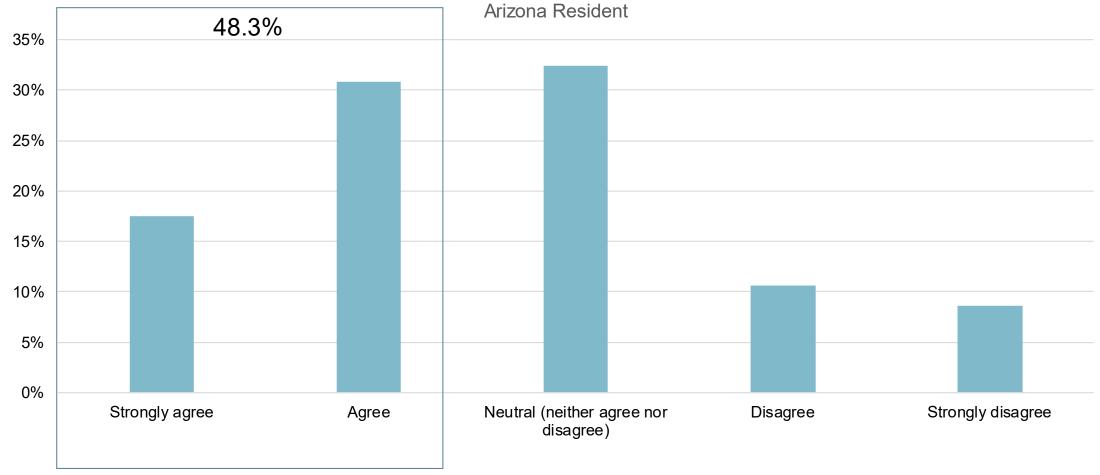


- Domestic American travelers
- Filtered for Arizona Residents
- July September 2021
- 253 responses





# 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

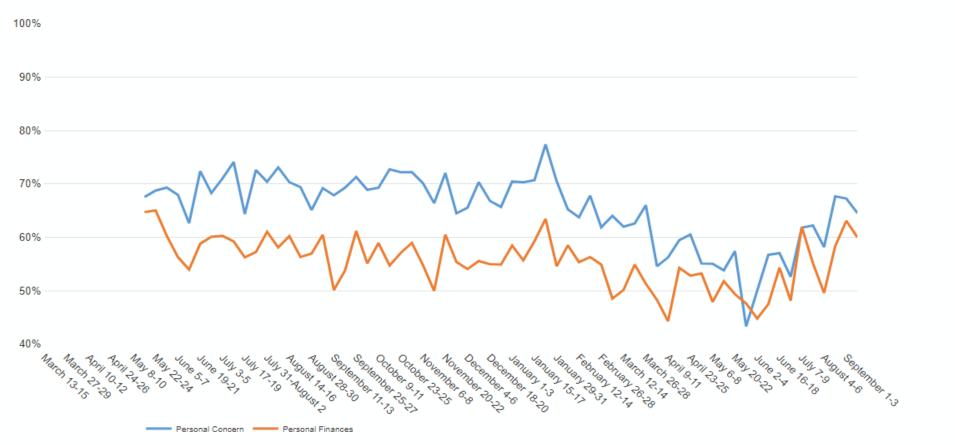
- Filtered for Arizona-Orientated which includes:
  - Visited Arizona (last 3 years)
  - Likely to Visit Arizona (next 3 years)





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

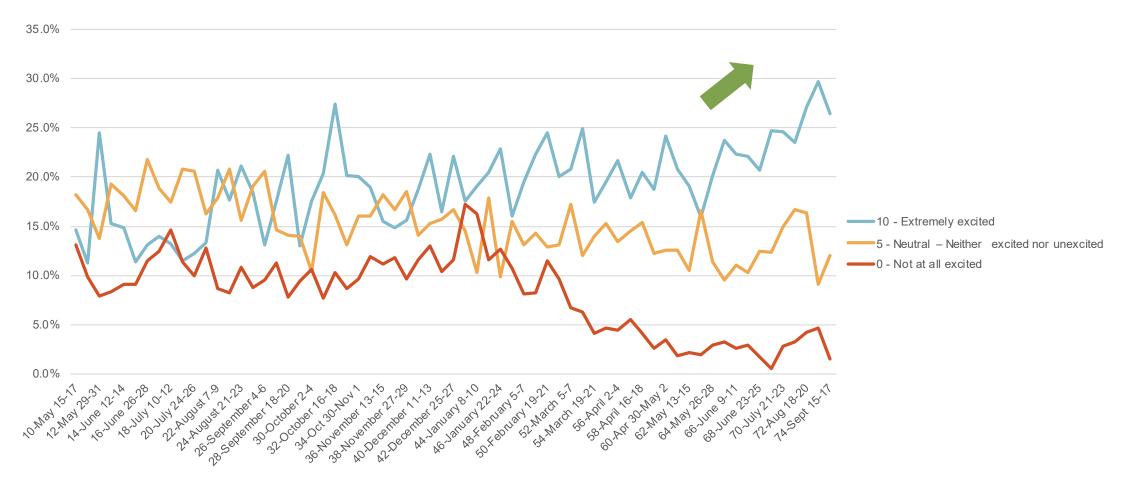
#### Concern - Time Series







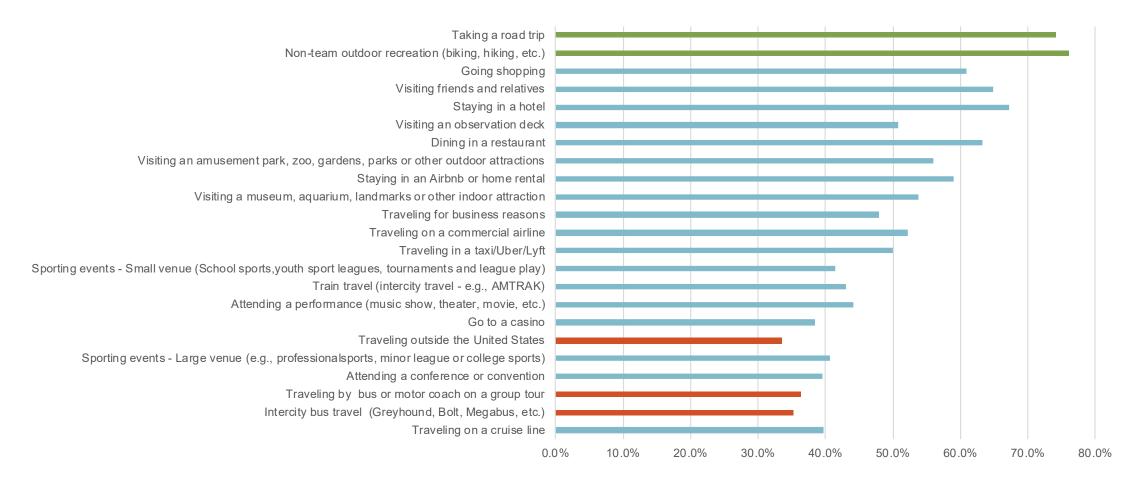
Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go?







# 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)
- <a href="https://tourism.az.gov/leavenotrace/">https://tourism.az.gov/leavenotrace/</a> (for destinations)

#### **AOT Team:**

- Colleen Floyd, <u>cfloyd@tourism.az.gov</u>
- Kari Roberg, <u>kroberg@tourism.az.gov</u>
- Lena Allen, <u>lallen@tourism.az.gov</u>



