Agenda

• Statewide Recap and 2021 so far
• Economic Impact of COVID on travel to the Tucson & Southern 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%
Declines in 2020 international visitation to Arizona

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

Source: Dean Runyan Associates, 10/28/21, PRELIMINARY
Domestic Overnight Visitation to Arizona

% Change compared to 2019

Q1: -11%  Q2: -48%  Q3: -23%  Q4: -21%

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

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

<table>
<thead>
<tr>
<th>Quarter</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>-10%</td>
<td>-15%</td>
</tr>
<tr>
<td>Q2</td>
<td>-45%</td>
<td>-1%</td>
</tr>
<tr>
<td>Q3</td>
<td>-19%</td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td>-16%</td>
<td></td>
</tr>
</tbody>
</table>

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

Source: Tourism Economics
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)

Cochise County

Direct Travel Spending
- $139 Million
- 40.2%

Accommodations Spending
- $11.4 Million
- 23.9%

Local Tax Receipts
- $4.7 Million
- 31.4%

Food Service Spending
- $38.5 Million
- 39.8%

Employment*
- 480 jobs
- 13.6%

Earnings*
- $7.7 Million
- 8.6%

*Employment and Earnings include CARES Act support

Source: [Arizona Travel Impacts](https://www.arizonatravelimpacts.com), Dean Runyan Associates, 2020p
## 2020 Travel Impacts
(YOY Difference and % Change compared to 2019)

### Graham County

<table>
<thead>
<tr>
<th>Category</th>
<th>2019 Value</th>
<th>2020 Value</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Travel Spending</td>
<td>-$30 Million</td>
<td>-$30 Million</td>
<td>-42.7%</td>
</tr>
<tr>
<td>Accommodations Spending</td>
<td>-$3.5 Million</td>
<td>-$3.5 Million</td>
<td>-28.6%</td>
</tr>
<tr>
<td>Local Tax Receipts</td>
<td>-$900,000</td>
<td>-$900,000</td>
<td>-32.1%</td>
</tr>
<tr>
<td>Food Service Spending</td>
<td>-$8.6 Million</td>
<td>-$8.6 Million</td>
<td>-43.5%</td>
</tr>
<tr>
<td>Employment*</td>
<td>-170 jobs</td>
<td>-170 jobs</td>
<td>-18.8%</td>
</tr>
<tr>
<td>Earnings*</td>
<td>-$600,000</td>
<td>-$600,000</td>
<td>-3.7%</td>
</tr>
</tbody>
</table>

*Employment and Earnings include CARES Act support

Source: [Arizona Travel Impacts](https://www.azdps.gov/), Dean Runyan Associates, 2020
2020 Travel Impacts
(YOY Difference and % Change compared to 2019)

Greenlee County

Direct Travel Spending
-$6.5 Million
-44.1%

Accommodations Spending
-$600,000
-28.2%

Local Tax Receipts
-$100,000
-39.9%

Food Service Spending
-$1.9 Million
-44.4%

Employment*
-20 jobs
-21.4%

Earnings*
-$700,000
-27.0%

*Employment and Earnings include CARES Act support

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
2020 Travel Impacts
(YOY Difference and % Change compared to 2019)

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020

Direct Travel Spending
-$1.57 Billion
-49.2%

Accommodations Spending
-$178 Million
-36.9%

Local Tax Receipts
-$33 Million
-40.3%

Food Service Spending
-$347 Million
-47.4%

Employment*
-5,480 jobs
-22.1%

Earnings*
-$148 Million
-18.6%

*Employment and Earnings include CARES Act support
2020 Travel Impacts
(YOY Difference and % Change compared to 2019)

Santa Cruz County

Direct Travel Spending
-$116 Million
-49.5%

Accommodations Spending
-$6.1 Million
-34.2%

Local Tax Receipts
-$3.2 Million
-39.7%

Food Service Spending
-$21.9 Million
-47.5%

Employment*
-320 jobs
-15.3%

Earnings*
-$8.3 Million
-14.3%

*Employment and Earnings include CARES Act support

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

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020

- Campground: $10 million (2019), $20 million (2020)
- Day Travel: $80 million (2019), $100 million (2020)
- Hotel, Motel, STVR: $120 million (2019), $140 million (2020)
Spending by Accommodation Choice
Graham County

![Chart showing spending by accommodation choice in Graham County, 2019 vs. 2020.](chart.png)

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

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

Pima County

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

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### 2019 vs 2020 Spending by Accommodation Choice

- **Campground:**
  - 2019: [Value]
  - 2020: [Value]

- **Day Travel:**
  - 2019: [Value]
  - 2020: [Value]

- **Hotel, Motel, STVR:**
  - 2019: [Value]
  - 2020: [Value]

- **Private Home:**
  - 2019: [Value]
  - 2020: [Value]

- **Vacation Home:**
  - 2019: [Value]
  - 2020: [Value]

---

*Source: Arizona Travel Impacts, Dean Runyan Associates, 2020*
Spending by Accommodation Choice
Santa Cruz County

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

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

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

<table>
<thead>
<tr>
<th>Commodity</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>$2.1</td>
<td>$1.5</td>
</tr>
<tr>
<td>Arts, Ent. &amp; Rec.</td>
<td>$1.0</td>
<td>$0.5</td>
</tr>
<tr>
<td>Food Service</td>
<td>$4.3</td>
<td></td>
</tr>
<tr>
<td>Food Stores</td>
<td>$1.2</td>
<td>$0.7</td>
</tr>
<tr>
<td>Local Tran. &amp; Gas</td>
<td>$1.9</td>
<td>$0.8</td>
</tr>
<tr>
<td>Retail Sales</td>
<td>$2.6</td>
<td>$1.4</td>
</tr>
<tr>
<td>Visitor Air Tran.</td>
<td>$0.0</td>
<td>$0.0</td>
</tr>
</tbody>
</table>

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

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
Spending by Commodity Purchased
Santa Cruz County

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
Tucson & Southern Region

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

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

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

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

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

YOY % Change

**Supply**

-11%

**Demand**

2%

Source: AirDNA
Airbnb – City Level

YOY % Change

Supply

Demand

Tucson MSA

Source: AirDNA
Airport Passenger Traffic

Phoenix Sky Harbor - Domestic

Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports
Airport Passenger Traffic
Tucson & Southern Region

Includes: Tucson International Airport

Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports
State Park Visitation
Tucson & Southern Region

Includes: Catalina SP, Kartchner Caverns SP, Patagonia Lake SP, Roper Lake SP, Tombstone Courthouse SHP, Tubac Presidio SHP

Source: State Park Visitation, Northern Arizona University, Arizona State Parks
National Park Visitation
Tucson & Southern Region

Includes: Chiricahua NM, Coronado NM, Fort Bowie NHS, Organ Pipe Cactus NM, Sagauro NP, Tumacacori NHP

Source: National Park Visitation, Northern Arizona University, National Park Service
Appreciate AZ

Toolkit and Resources

Brochure
Posters
Social Media Assets
Talking Points
Digital Courses

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

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

Source: Northern Arizona University’s Economic Policy Institute, Arizona Department of Revenue
Gross Sales

Pima County

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

Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue
Traveler Behaviors
Main Purpose of Trip Trend
Tucson & Southern Region

Source: Longwoods International
Accommodation Choice Trend
Tucson & Southern Region

Source: Longwoods International
# Top Origin Markets
## Tucson & Southern Region

<table>
<thead>
<tr>
<th>DMA</th>
<th>Percent of Trips in 2018</th>
<th>DMA</th>
<th>Percent of Trips in 2019</th>
<th>DMA</th>
<th>Percent of Trips in 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phoenix, AZ</td>
<td>25</td>
<td>Phoenix, AZ</td>
<td>23</td>
<td>Phoenix, AZ</td>
<td>22</td>
</tr>
<tr>
<td>Tucson (Nogales), AZ</td>
<td>13</td>
<td>Tucson (Nogales), AZ</td>
<td>14</td>
<td>Tucson (Nogales), AZ</td>
<td>16</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>8</td>
<td>Los Angeles, CA</td>
<td>7</td>
<td>Los Angeles, CA</td>
<td>7</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>3</td>
<td>Seattle-Tacoma, WA</td>
<td>3</td>
<td>New York, NY</td>
<td>4</td>
</tr>
<tr>
<td>New York, NY</td>
<td>2</td>
<td>Chicago, IL</td>
<td>3</td>
<td>Denver, CO</td>
<td>3</td>
</tr>
<tr>
<td>Albuquerque-Santa Fe, NM</td>
<td>2</td>
<td>San Diego, CA</td>
<td>2</td>
<td>San Diego, CA</td>
<td>2</td>
</tr>
<tr>
<td>Minneapolis-St. Paul, MN</td>
<td>2</td>
<td>Albuquerque-Santa Fe, NM</td>
<td>2</td>
<td>Chicago, IL</td>
<td>2</td>
</tr>
<tr>
<td>San Francisco-Oakland-San Jose, CA</td>
<td>2</td>
<td>Denver, CO</td>
<td>2</td>
<td>Seattle-Tacoma, WA</td>
<td>2</td>
</tr>
<tr>
<td>Sacramento-Stockton-Modesto, CA</td>
<td>2</td>
<td>Philadelphia, PA</td>
<td>2</td>
<td>Las Vegas, NV</td>
<td>2</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>2</td>
<td>New York, NY</td>
<td>2</td>
<td>Sacramento-Stockton-Modesto, CA</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Longwoods International
## Top Origin Markets 2021

### DMA Percent of Trips in Q1 2021

<table>
<thead>
<tr>
<th>DMA</th>
<th>Percent of Trips in Q1 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phoenix, AZ</td>
<td>33</td>
</tr>
<tr>
<td>Tucson (Nogales), AZ</td>
<td>10</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>5</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>3</td>
</tr>
<tr>
<td>Minneapolis-St. Paul, MN</td>
<td>3</td>
</tr>
<tr>
<td>New York, NY</td>
<td>2</td>
</tr>
<tr>
<td>El Paso, TX</td>
<td>2</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>2</td>
</tr>
<tr>
<td>Albuquerque-Santa Fe, NM</td>
<td>2</td>
</tr>
<tr>
<td>Seattle-Tacoma, WA</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Longwoods International

### DMA Percent of Trips in Q2 2021

<table>
<thead>
<tr>
<th>DMA</th>
<th>Percent of Trips in Q2 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phoenix, AZ</td>
<td>22</td>
</tr>
<tr>
<td>Tucson (Nogales), AZ</td>
<td>21</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>9</td>
</tr>
<tr>
<td>New York, NY</td>
<td>4</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>3</td>
</tr>
<tr>
<td>Minneapolis-St. Paul, MN</td>
<td>3</td>
</tr>
<tr>
<td>El Paso, TX</td>
<td>3</td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>2</td>
</tr>
<tr>
<td>Seattle-Tacoma, WA</td>
<td>2</td>
</tr>
<tr>
<td>Yuma-El Centro, AZ/CA</td>
<td>2</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: Longwoods International
2020 Visitor profile

Regional Profiles

The research and analysis component of the Arizona Office of Tourism serves as the resource repository for all Arizona tourism industry information, which is used by state and local government agencies, tourism organizations, and other tourism-related stakeholders. This information helps to support and sustain Arizona’s tourism industry and improves the visitor experience.

Overnight Visitors:
- 32.1 million
- $2.7 billion

Visitor Spending:
- $15 billion
- 160,500 thousand

[Images of regional profiles: Northern Region, Tucson & Southern Region, West Coast Region, North Central Region, Phoenix & Central Region]

https://tourism.az.gov/regional-profiles/
Main Purpose of Trip
Tucson & Southern Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Length of Trip Planning
Tucson & Southern Region

Q1 (January-March)

Q2 (April-June)

Percent of Trips

Source: Longwoods International
Total Nights Away
Tucson & Southern Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Travel Party Composition
Tucson & Southern Region

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

Source: Longwoods International
Age
Tucson & Southern Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Household Income
Tucson & Southern Region

Q1 (January-March)

Q2 (April-June)

Percent of Trips

Source: Longwoods International
Cochise County
Trips by Arrival County Over Time

Cochise County

Source: Arrivalist
## Top Origin Markets for Overnight Stays

**Time Period: 1/1/2020 – 8/31/21**

**Cochise 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>Los Angeles</td>
<td>18.1%</td>
<td>26%</td>
<td>1 Day, 17 Hours, 18 Minutes</td>
</tr>
<tr>
<td>Phoenix</td>
<td>15.6%</td>
<td>29%</td>
<td>1 Day, 10 Hours, 35 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>8.4%</td>
<td>48%</td>
<td>1 Day, 11 Hours, 26 Minutes</td>
</tr>
<tr>
<td>El Paso</td>
<td>4.4%</td>
<td>34%</td>
<td>2 Days, 3 Hours, 6 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>4.3%</td>
<td>25%</td>
<td>1 Day, 15 Hours, 14 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>2.9%</td>
<td>24%</td>
<td>2 Days, 23 Hours, 56 Minutes</td>
</tr>
<tr>
<td>San Diego</td>
<td>2.1%</td>
<td>23%</td>
<td>2 Days, 7 Hours, 15 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>1.8%</td>
<td>22%</td>
<td>2 Days, 5 Hours, 11 Minutes</td>
</tr>
<tr>
<td>Dallas/Fort Worth</td>
<td>1.8%</td>
<td>21%</td>
<td>2 Days, 3 Hours, 28 Minutes</td>
</tr>
<tr>
<td>San Francisco/Oakland/San Jose</td>
<td>1.7%</td>
<td>6%</td>
<td>2 Days, 4 Hours, 33 Minutes</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Graham County
Trips by Arrival County Over Time

Graham County

Source: Arrivalist
# Top Origin Markets for Overnight Stays

**Graham County**

**Time Period: 1/1/2020 – 8/31/21**

<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>14.2%</td>
<td>15%</td>
<td>1 Day, 22 Hours, 46 Minutes</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>12.4%</td>
<td>28%</td>
<td>1 Day, 3 Hours, 4 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>11.4%</td>
<td>19%</td>
<td>2 Days, 2 Hours, 48 Minutes</td>
</tr>
<tr>
<td>Reno</td>
<td>5.7%</td>
<td>14%</td>
<td>3 Days, 1 Hour, 32 Minutes</td>
</tr>
<tr>
<td>Fresno/Visalia</td>
<td>3.6%</td>
<td>36%</td>
<td>1 Day, 1 Hour, 37 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>3.1%</td>
<td>15%</td>
<td>1 Day, 18 Hours, 44 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>2.5%</td>
<td>23%</td>
<td>2 Days, 16 Hours, 37 Minutes</td>
</tr>
<tr>
<td>Bakersfield</td>
<td>2.5%</td>
<td>39%</td>
<td>22 Hours, 21 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>1.8%</td>
<td>8%</td>
<td>3 Days, 13 Minutes</td>
</tr>
<tr>
<td>Chicago</td>
<td>1.7%</td>
<td>7%</td>
<td>2 Days, 21 Hours, 37 Minutes</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Greenlee County
Trips by Arrival County Over Time

Greenlee County

Source: Arrivalist
## Top Origin Markets for Overnight Stays

**Time Period: 1/1/2020 – 8/31/21**

**Greenlee 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>23.8%</td>
<td>10%</td>
<td>1 Day, 6 Hours, 49 Minutes</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>12.7%</td>
<td>15%</td>
<td>1 Day, 40 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>10.2%</td>
<td>13%</td>
<td>1 Day, 18 Hours, 57 Minutes</td>
</tr>
<tr>
<td>Seattle/Tacoma</td>
<td>2.6%</td>
<td>1%</td>
<td>3 Days, 1 Hour, 46 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>2.1%</td>
<td>6%</td>
<td>21 Hours, 18 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>1.9%</td>
<td>4%</td>
<td>3 Days, 4 Hours, 29 Minutes</td>
</tr>
<tr>
<td>Fresno/Visalia</td>
<td>1.7%</td>
<td>14%</td>
<td>1 Day, 6 Hours, 38 Minutes</td>
</tr>
<tr>
<td>New York</td>
<td>1.7%</td>
<td>0%</td>
<td>1 Day, 23 Hours, 27 Minutes</td>
</tr>
<tr>
<td>Portland-Or</td>
<td>1.6%</td>
<td>0%</td>
<td>3 Days, 3 Hours, 54 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>1.5%</td>
<td>10%</td>
<td>2 Days, 1 Hour, 5 Minutes</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Pima County
Trips by Arrival County Over Time

Pima County

Source: Arrivalist
## Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Pima 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>20.6%</td>
<td>25%</td>
<td>1 Day, 10 Hours, 8 Minutes</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>10.3%</td>
<td>25%</td>
<td>2 Days, 1 Hour, 45 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>4.3%</td>
<td>31%</td>
<td>1 Day, 6 Hours, 56 Minutes</td>
</tr>
<tr>
<td>Denver</td>
<td>3.8%</td>
<td>12%</td>
<td>3 Days, 22 Hours, 23 Minutes</td>
</tr>
<tr>
<td>El Paso</td>
<td>3.1%</td>
<td>21%</td>
<td>2 Days, 6 Hours, 55 Minutes</td>
</tr>
<tr>
<td>San Francisco/Oakland/San Jose</td>
<td>2.9%</td>
<td>12%</td>
<td>2 Days, 22 Hours, 36 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>2.5%</td>
<td>24%</td>
<td>2 Days, 14 Hours, 25 Minutes</td>
</tr>
<tr>
<td>Seattle/Tacoma</td>
<td>2.4%</td>
<td>10%</td>
<td>4 Days, 8 Hours, 1 Minute</td>
</tr>
<tr>
<td>Chicago</td>
<td>2.3%</td>
<td>10%</td>
<td>3 Days, 20 Hours, 50 Minutes</td>
</tr>
<tr>
<td>Dallas/Fort Worth</td>
<td>2.3%</td>
<td>16%</td>
<td>2 Days, 20 Hours, 11 Minutes</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Santa Cruz County
Trips by Arrival County Over Time

Santa Cruz County

Source: Arrivalist
# Top Origin Markets for Overnight Stays

**Time Period:** 1/1/2020 – 8/31/21  
**Santa Cruz 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>18.7%</td>
<td>23%</td>
<td>2 Days, 3 Hours, 26 Minutes</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>10.6%</td>
<td>29%</td>
<td>1 Day, 17 Hours, 22 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>6.7%</td>
<td>25%</td>
<td>1 Day, 14 Hours, 10 Minutes</td>
</tr>
<tr>
<td>Reno</td>
<td>5.7%</td>
<td>18%</td>
<td>2 Days, 23 Hours, 2 Minutes</td>
</tr>
<tr>
<td>El Paso</td>
<td>3.5%</td>
<td>36%</td>
<td>1 Day, 21 Hours, 14 Minutes</td>
</tr>
<tr>
<td>Portland-Or</td>
<td>3.1%</td>
<td>5%</td>
<td>3 Days, 13 Hours, 39 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>2.9%</td>
<td>11%</td>
<td>2 Days, 8 Hours, 31 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>2.6%</td>
<td>20%</td>
<td>2 Days, 6 Hours, 15 Minutes</td>
</tr>
<tr>
<td>Seattle/Tacoma</td>
<td>2.3%</td>
<td>5%</td>
<td>3 Days, 18 Hours, 23 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>2.2%</td>
<td>29%</td>
<td>2 Days, 16 Hours, 54 Minutes</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?

Source: Destination Analysts
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)

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Thank you!

Photo credit: Enrique Noriega