



# Travel Research Trends

**Tucson & Southern Region**

November 2, 2021

Photo credit: Sergio Tapiro Velasco

# 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

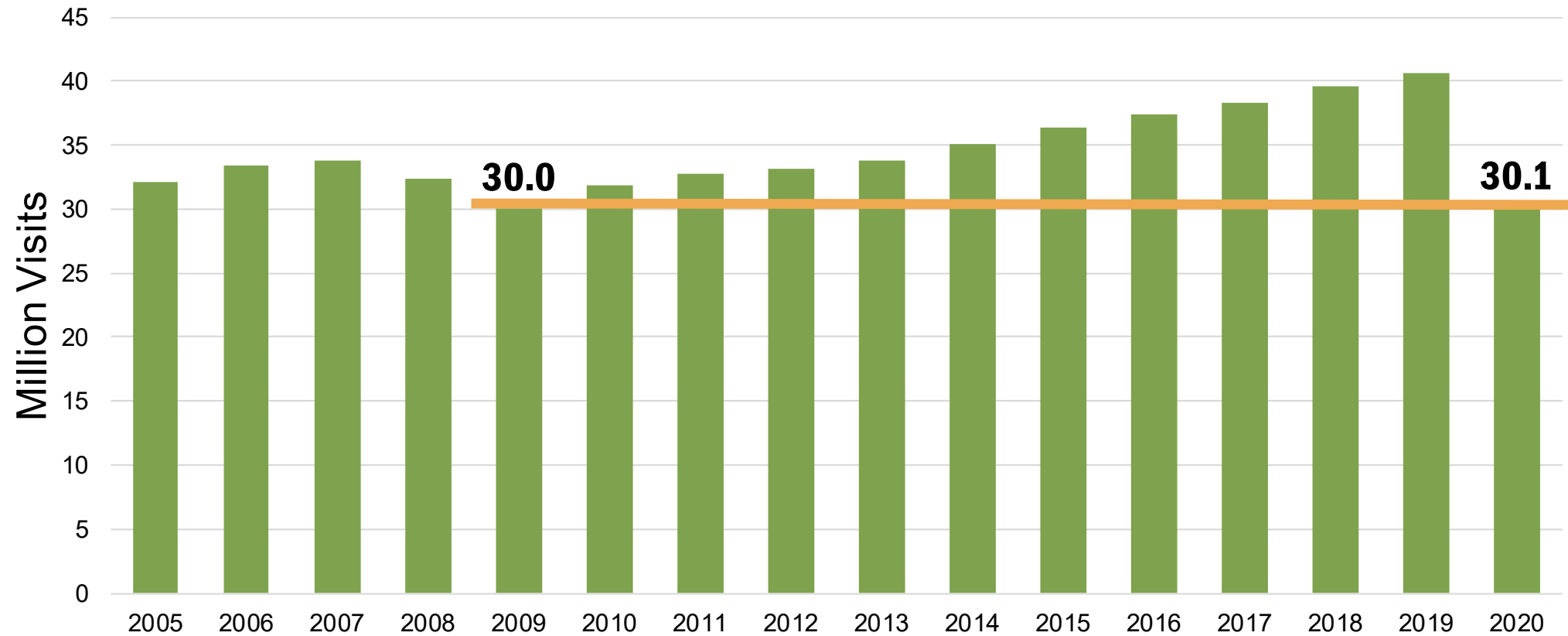
**32.1 million**  
**Overnight Visitors**

**-31%**

**\$15 billion**  
**Travel Spending**

**-41%**

# Domestic Overnight Visitation Arizona

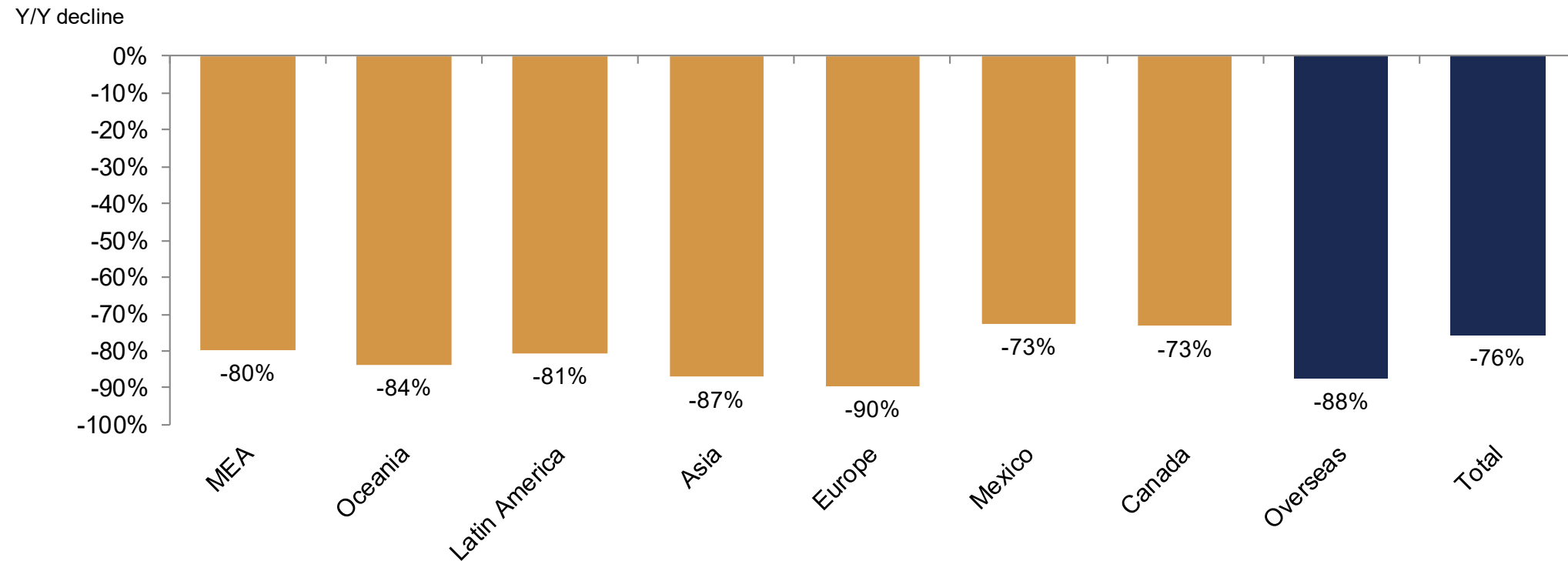


Source: Tourism Economics, 2020

# International Visitation to Arizona

## YOY % Change (2020 v. 2019)

### Declines in 2020 international visitation to Arizona

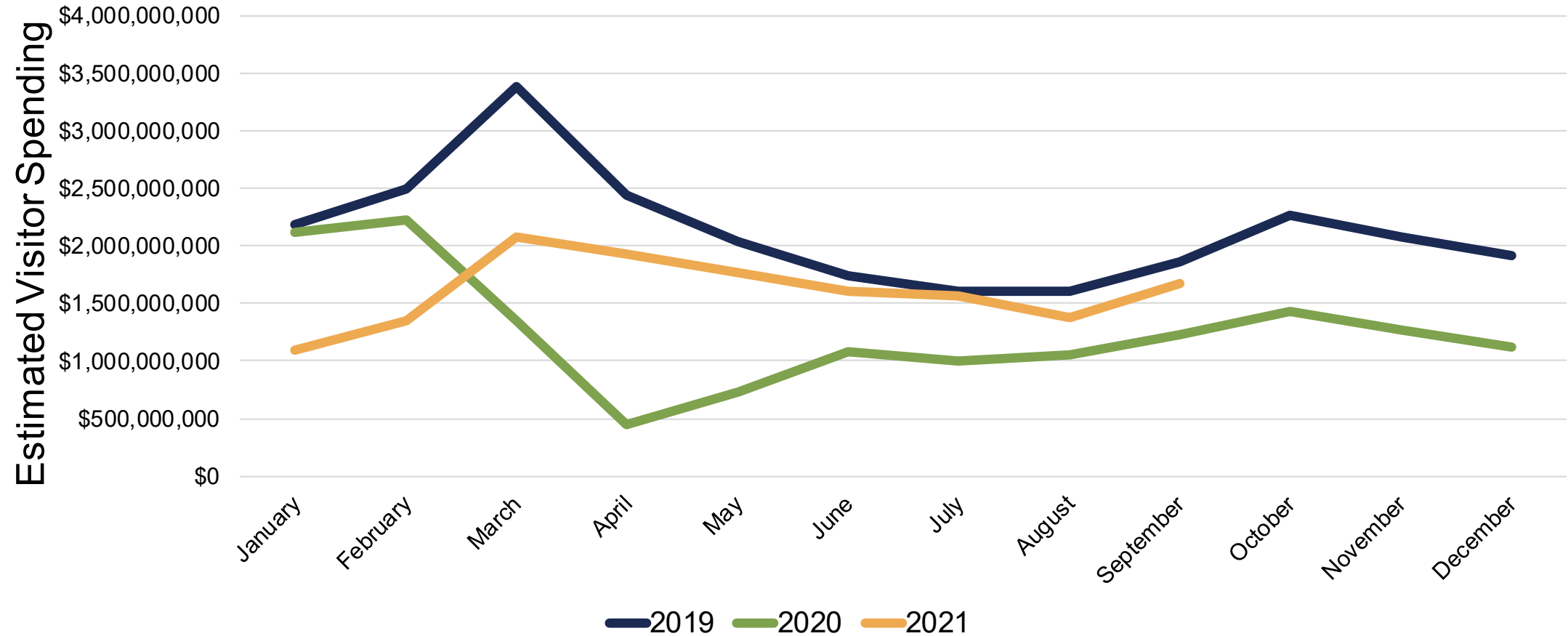


Source: Tourism Economics, updated 10/1/2021



# Travel Spending Trend

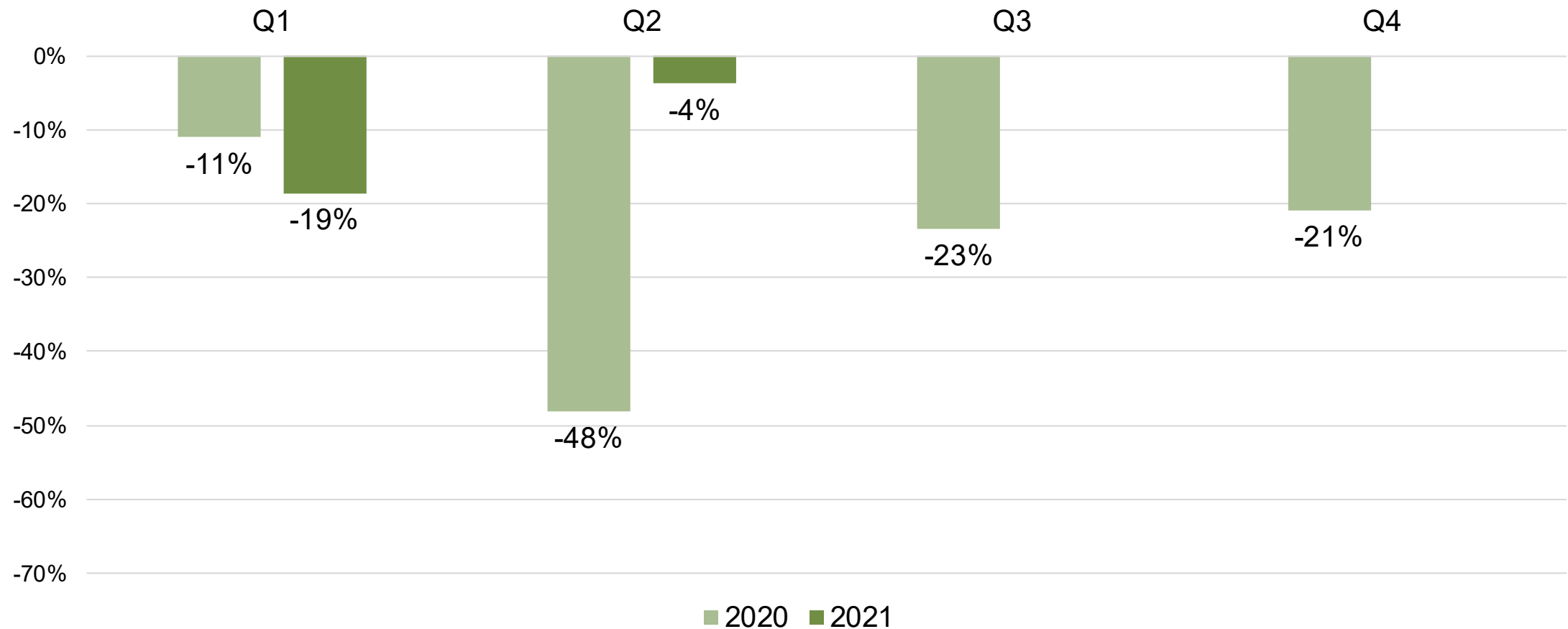
## Arizona



Source: Dean Runyan Associates, 10/28/21, PRELIMINARY

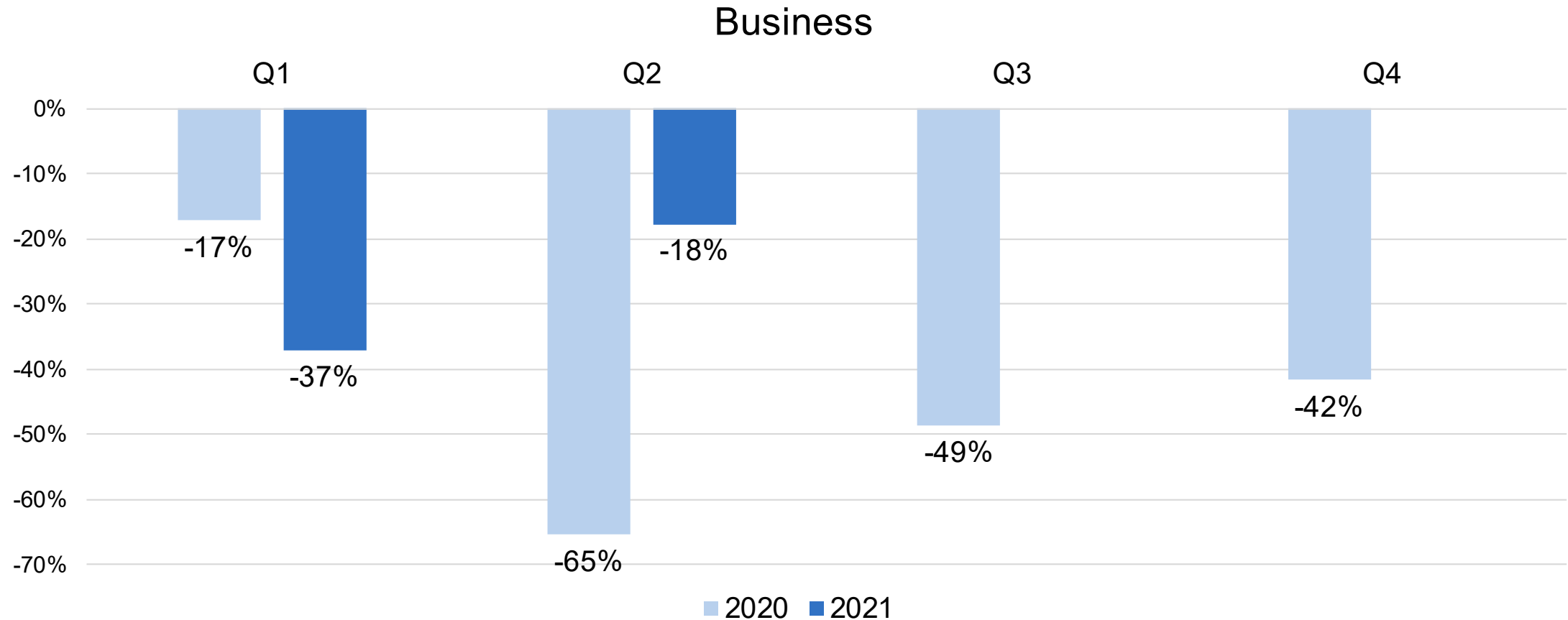
# Domestic Overnight Visitation to Arizona

## % Change compared to 2019



# Domestic Overnight Visitation to Arizona

## % Change compared to 2019

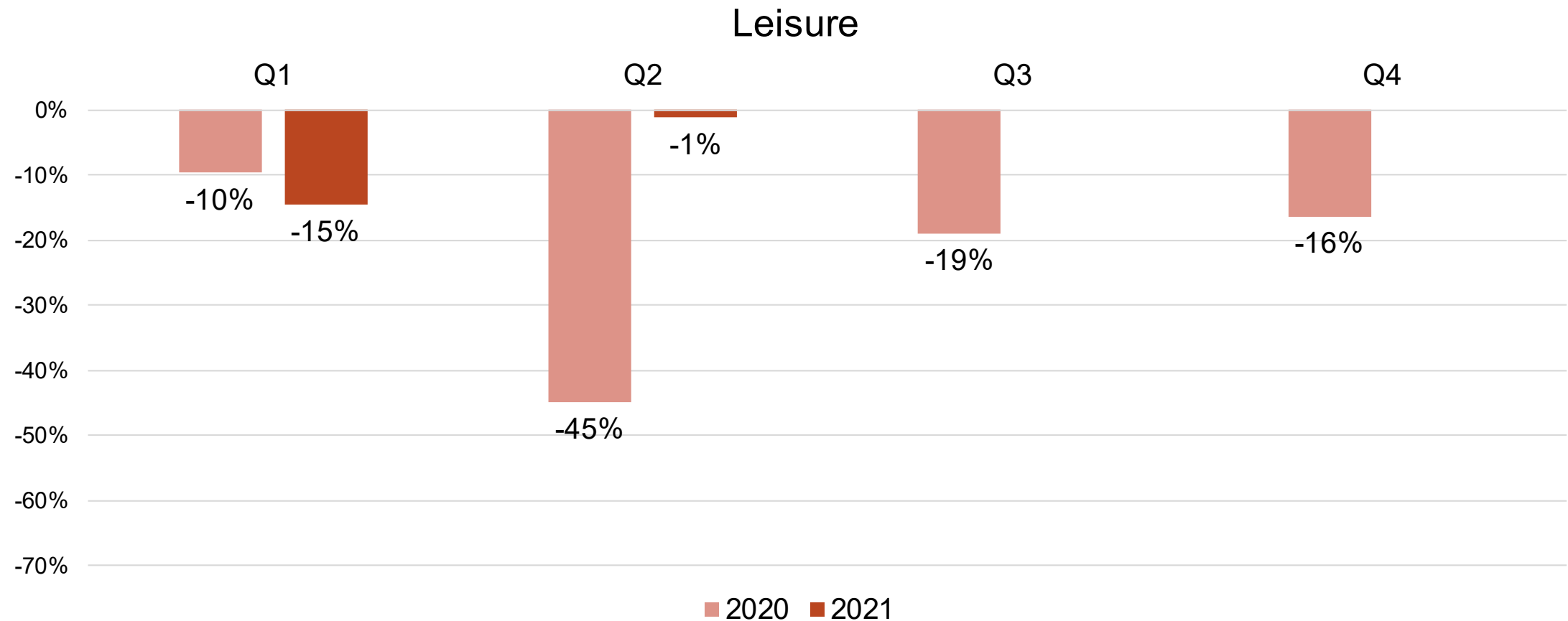






# Domestic Overnight Visitation to Arizona

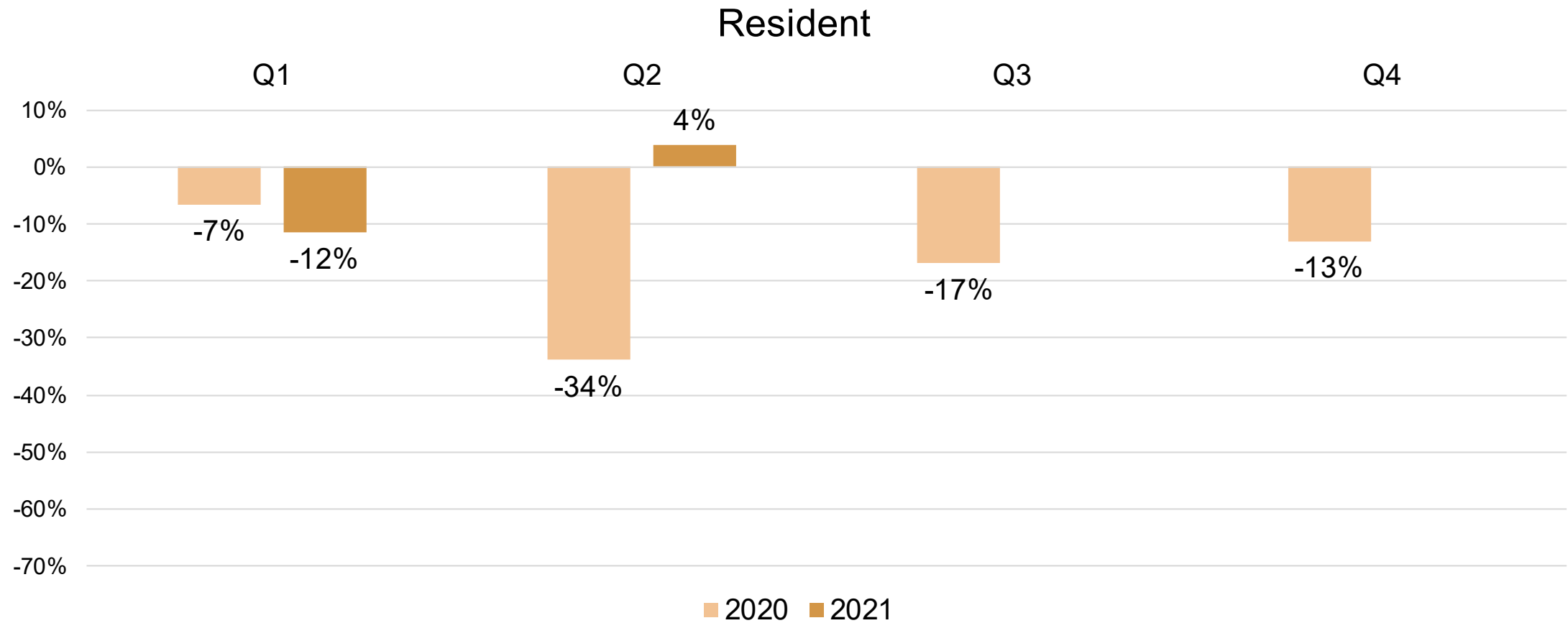
## % Change compared to 2019





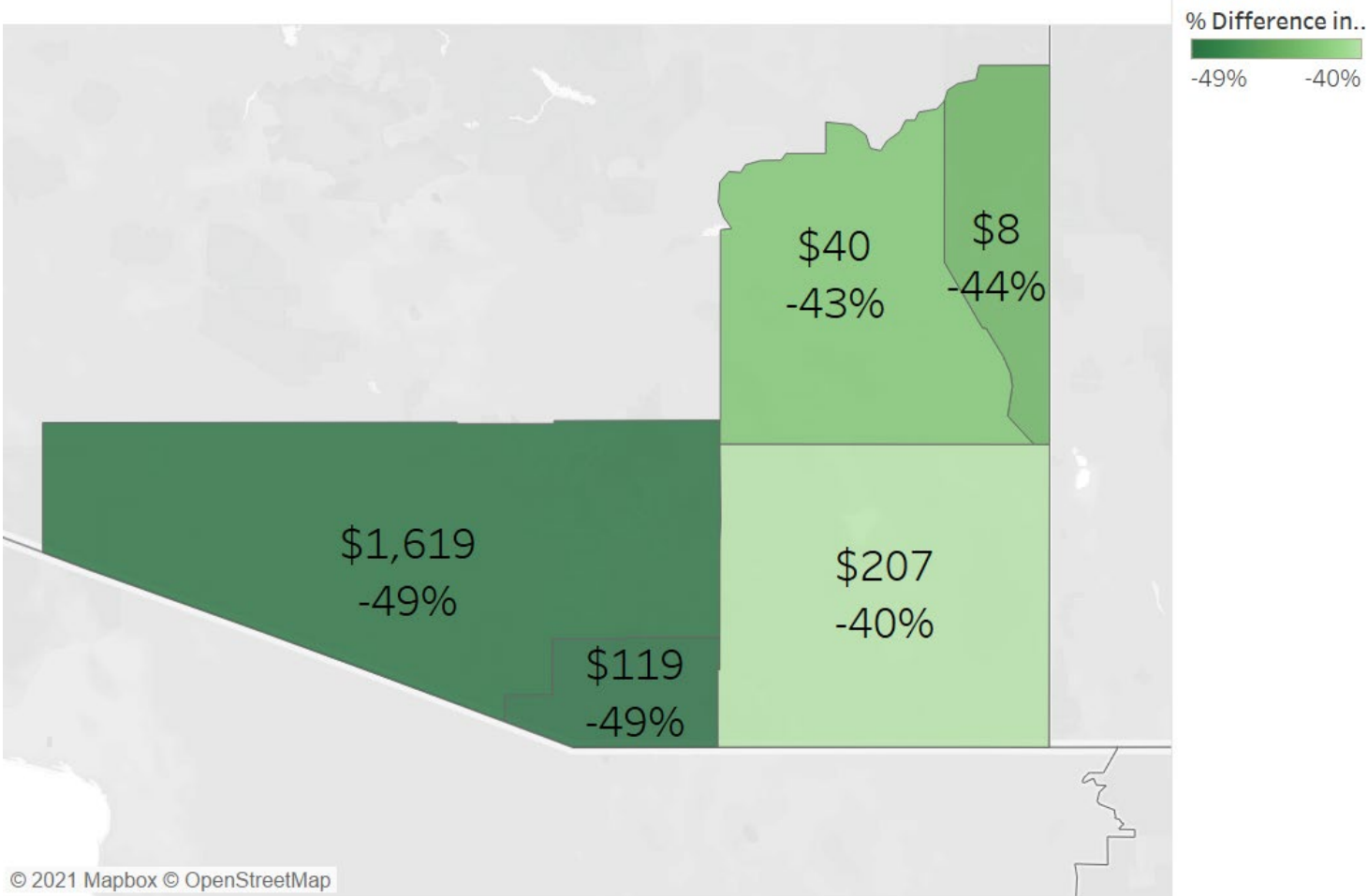
# Domestic Overnight Visitation to Arizona

## % Change compared to 2019



# 2020 Visitor Spending

(\$ Millions and YOY % Change)



© 2021 Mapbox © OpenStreetMap

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%

### Local Tax Receipts

-\$4.7 Million  
-31.4%

### Employment\*

-480 jobs  
-13.6%

### Accommodations Spending

-\$11.4 Million  
-23.9%

### Food Service Spending

-\$38.5 Million  
-39.8%

### Earnings\*

-\$7.7 Million  
-8.6%

# 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

## Graham County

### Direct Travel Spending

-\$30 Million  
-42.7%

### Local Tax Receipts

-\$900,000  
-32.1%

### Employment\*

-170 jobs  
-18.8%

### Accommodations Spending

-\$3.5 Million  
-28.6%

### Food Service Spending

-\$8.6 Million  
-43.5%

### Earnings\*

-\$600,000  
-3.7%

# 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

## Greenlee County

### Direct Travel Spending

-\$6.5 Million  
-44.1%

### Local Tax Receipts

-\$100,000  
-39.9%

### Employment\*

-20 jobs  
-21.4%

### Accommodations Spending

-\$600,000  
-28.2%

### Food Service Spending

-\$1.9 Million  
-44.4%

### Earnings\*

-\$700,000  
-27.0%

# 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

## Pima County

### Direct Travel Spending

**-\$1.57 Billion**  
-49.2%

### Local Tax Receipts

**-\$33 Million**  
-40.3%

### Employment\*

**-5,480 jobs**  
-22.1%

### Accommodations Spending

**-\$178 Million**  
-36.9%

### Food Service Spending

**-\$347 Million**  
-47.4%

### Earnings\*

**-\$148 Million**  
-18.6%

# 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

## Santa Cruz County

Direct Travel Spending

-\$116 Million  
-49.5%

Local Tax Receipts

-\$3.2 Million  
-39.7%

Employment\*

-320 jobs  
-15.3%

Accommodations  
Spending

-\$6.1 Million  
-34.2%

Food Service Spending

-\$21.9 Million  
-47.5%

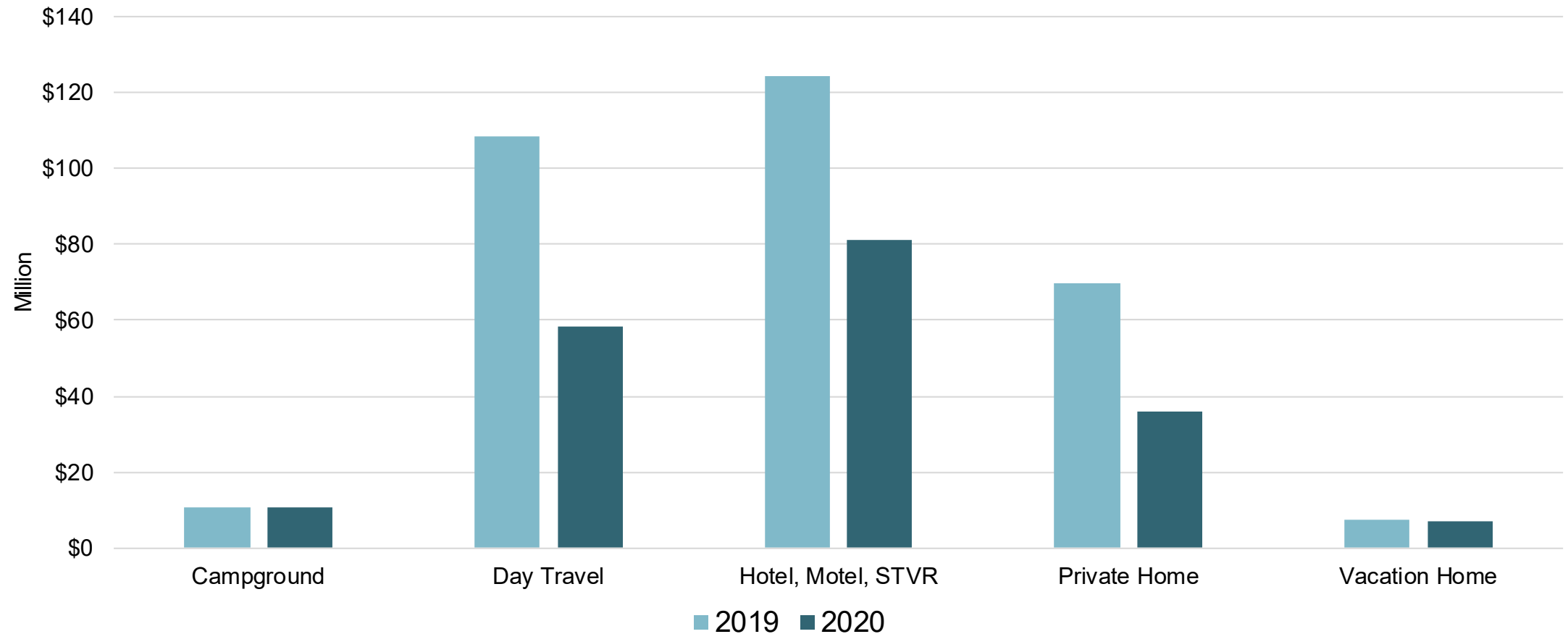
Earnings\*

-\$8.3 Million  
-14.3%



# Spending by Accommodation Choice

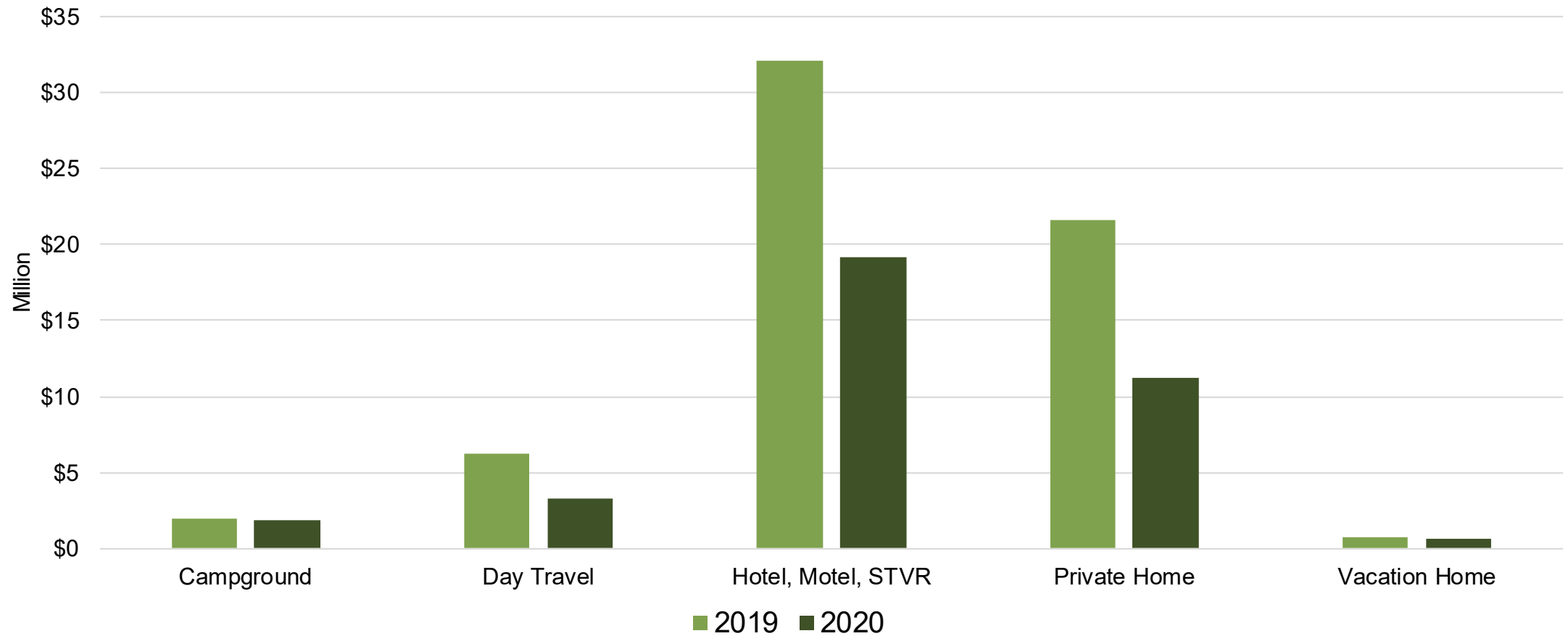
## Cochise County



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

# Spending by Accommodation Choice

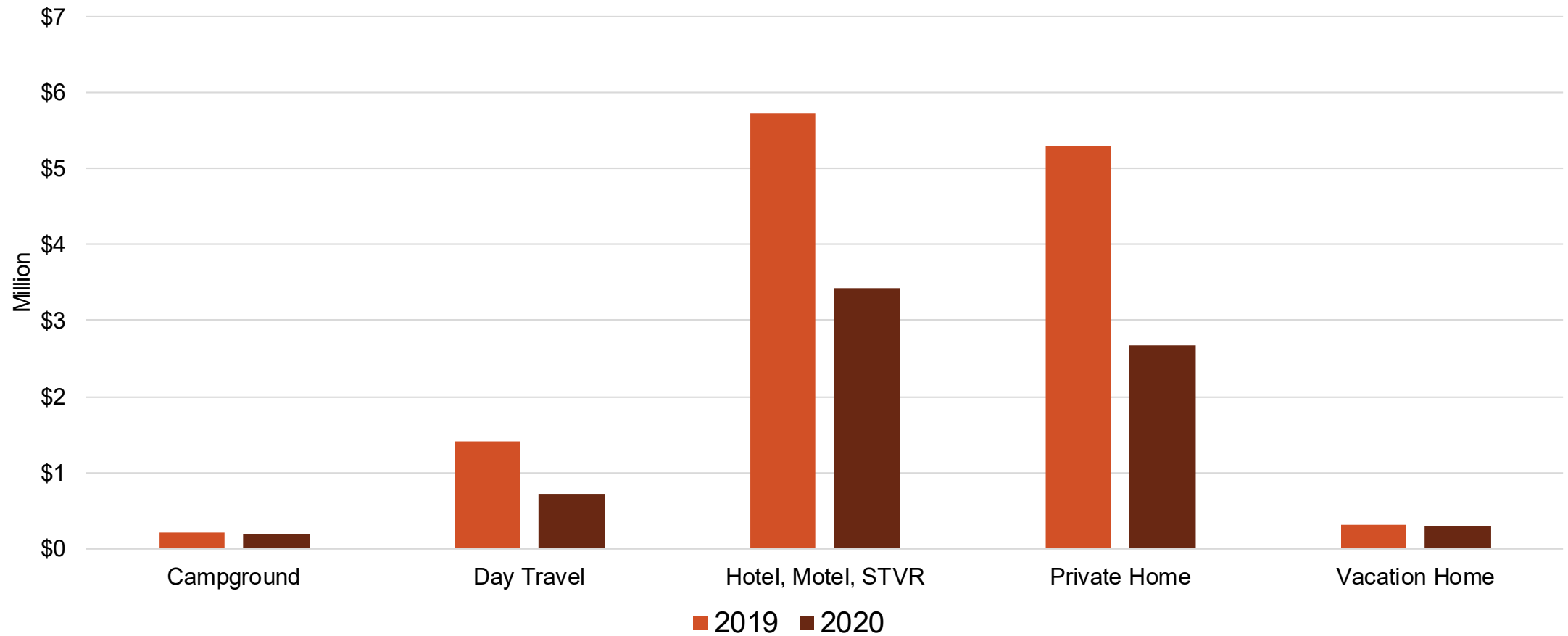
## Graham County



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

# Spending by Accommodation Choice

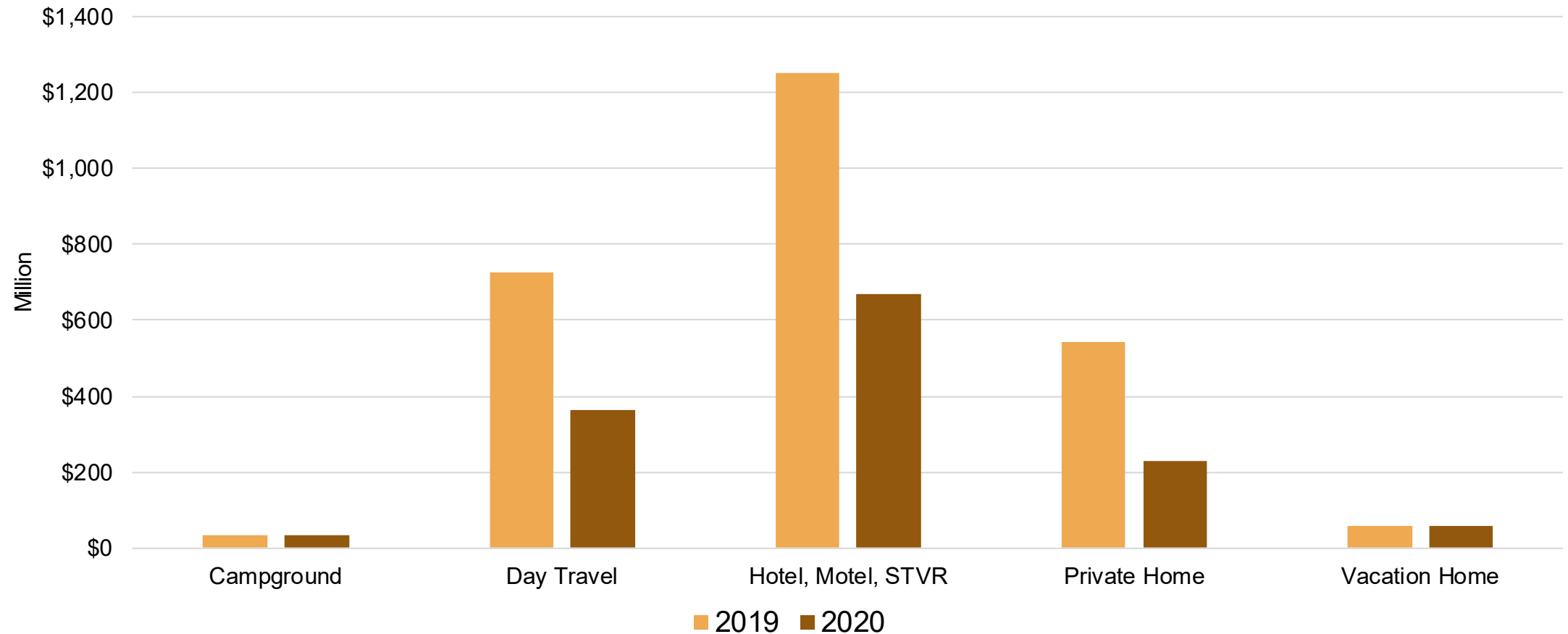
## Greenlee County



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

# Spending by Accommodation Choice

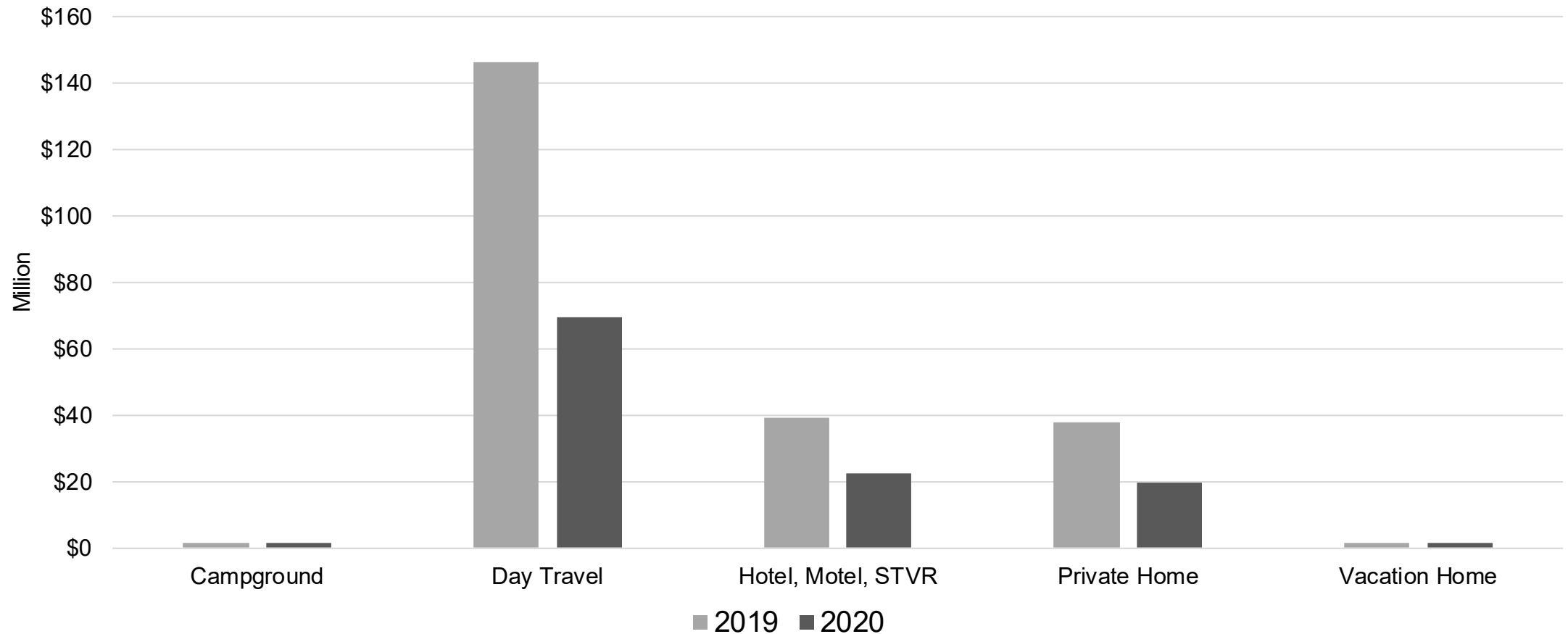
## Pima County



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

# Spending by Accommodation Choice

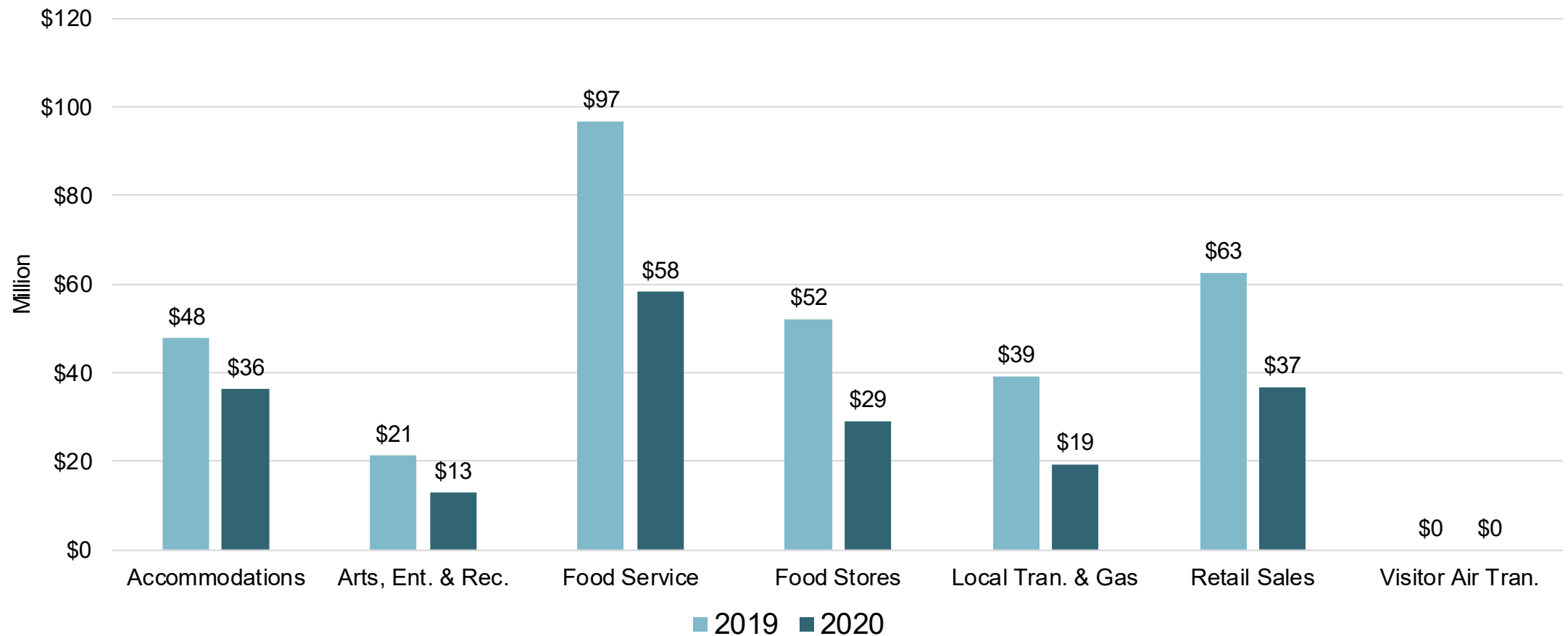
## Santa Cruz County



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

# Spending by Commodity Purchased

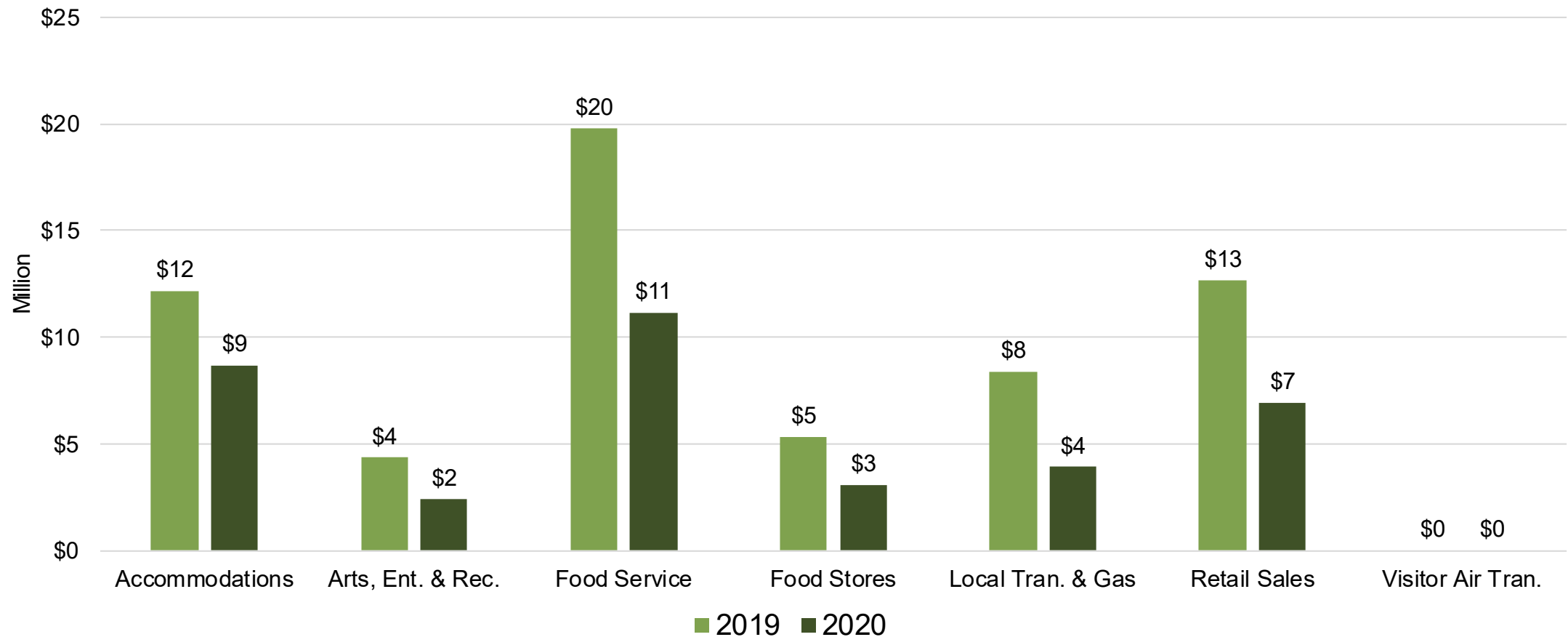
## Cochise County



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

# Spending by Commodity Purchased

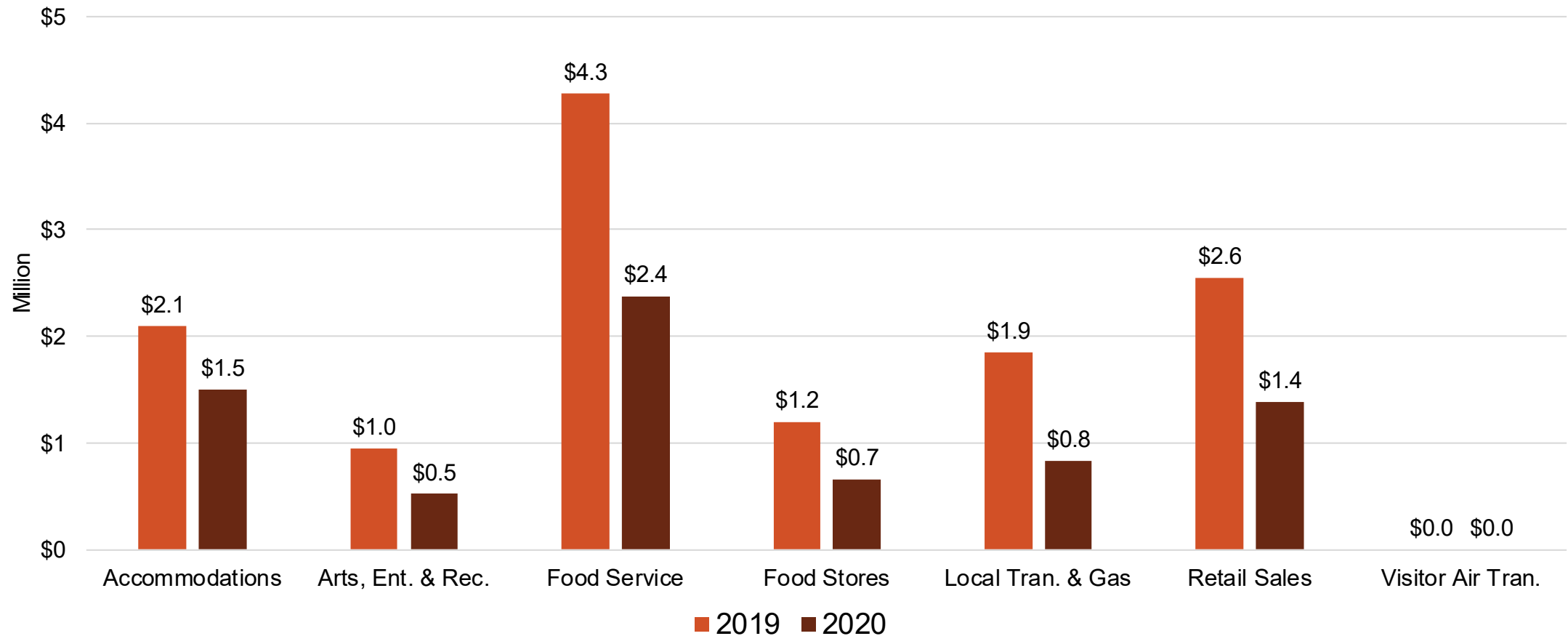
## Graham County



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

# Spending by Commodity Purchased

## Greenlee County

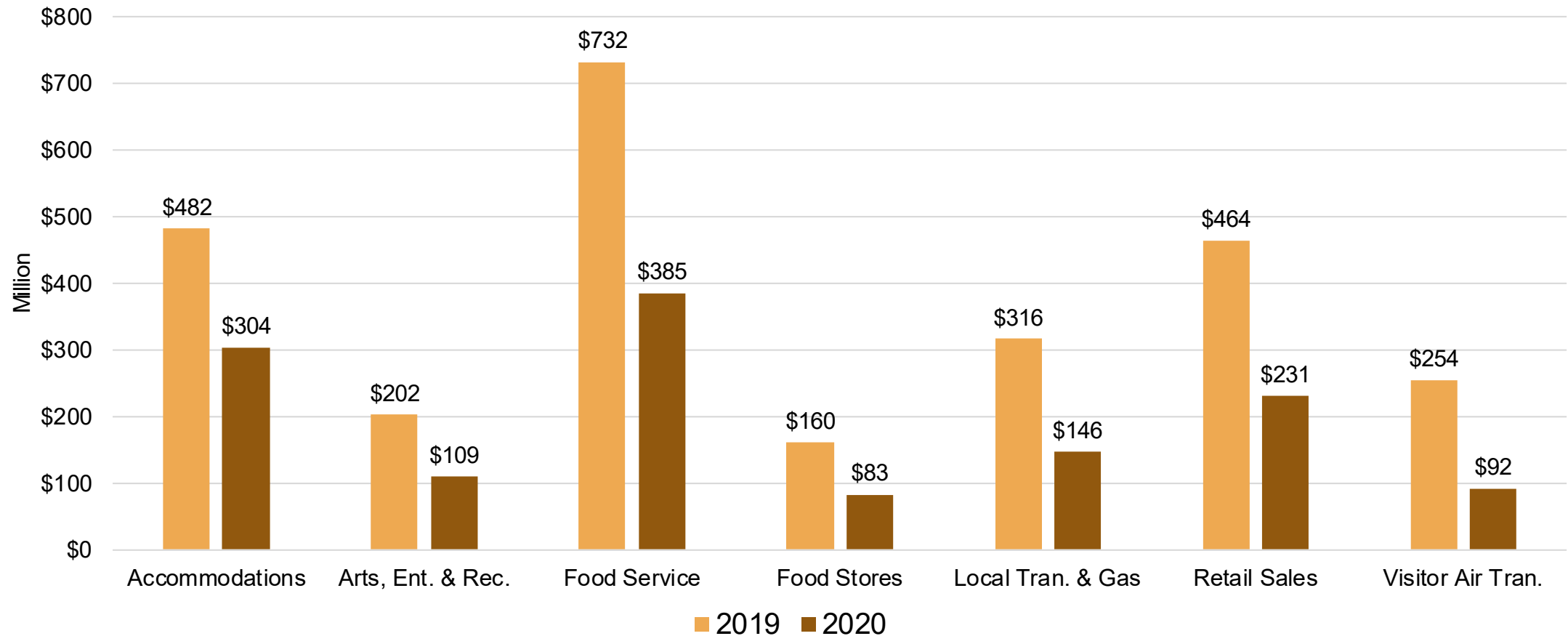


Source: [Arizona Travel Impacts](#), Dean Runyan Associates, 2020p



# Spending by Commodity Purchased

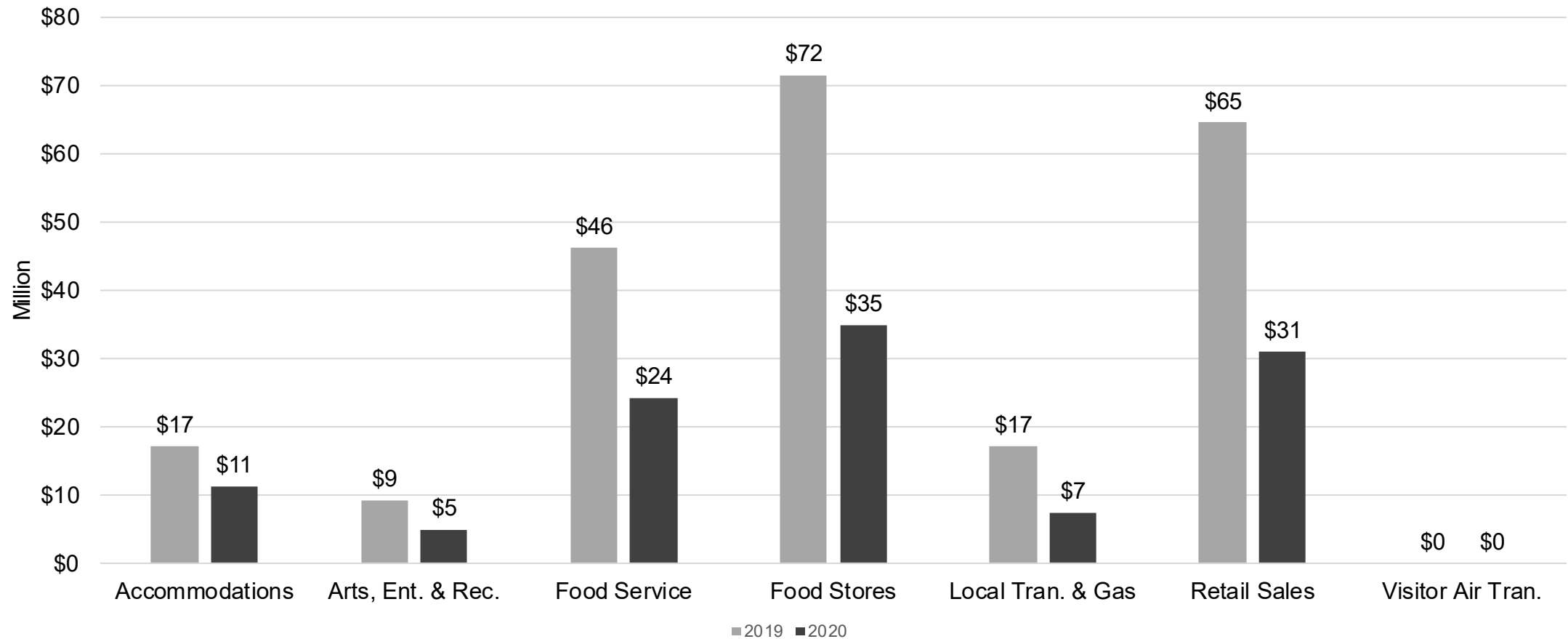
## Pima County



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

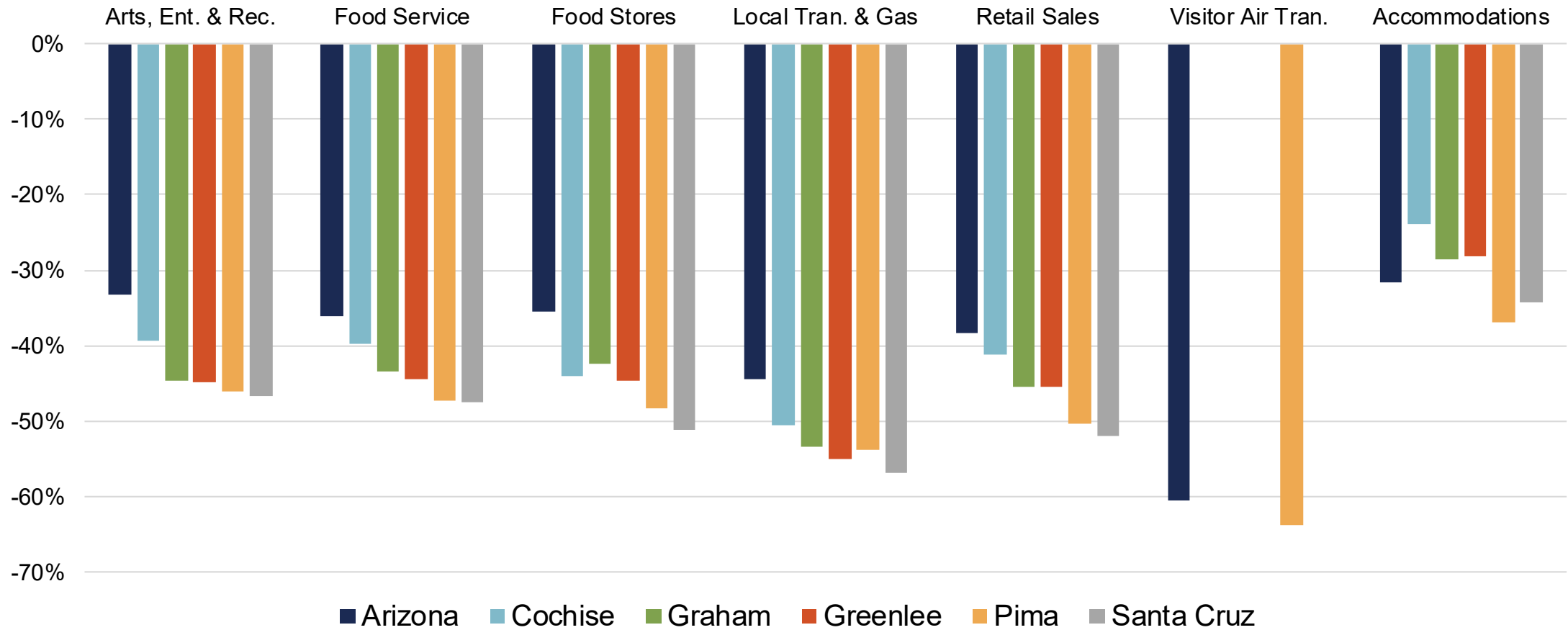
# Spending by Commodity Purchased

## Santa Cruz County



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

# Spending by Commodity Purchased % change



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



# 2021 Tourism Indicators To-Date

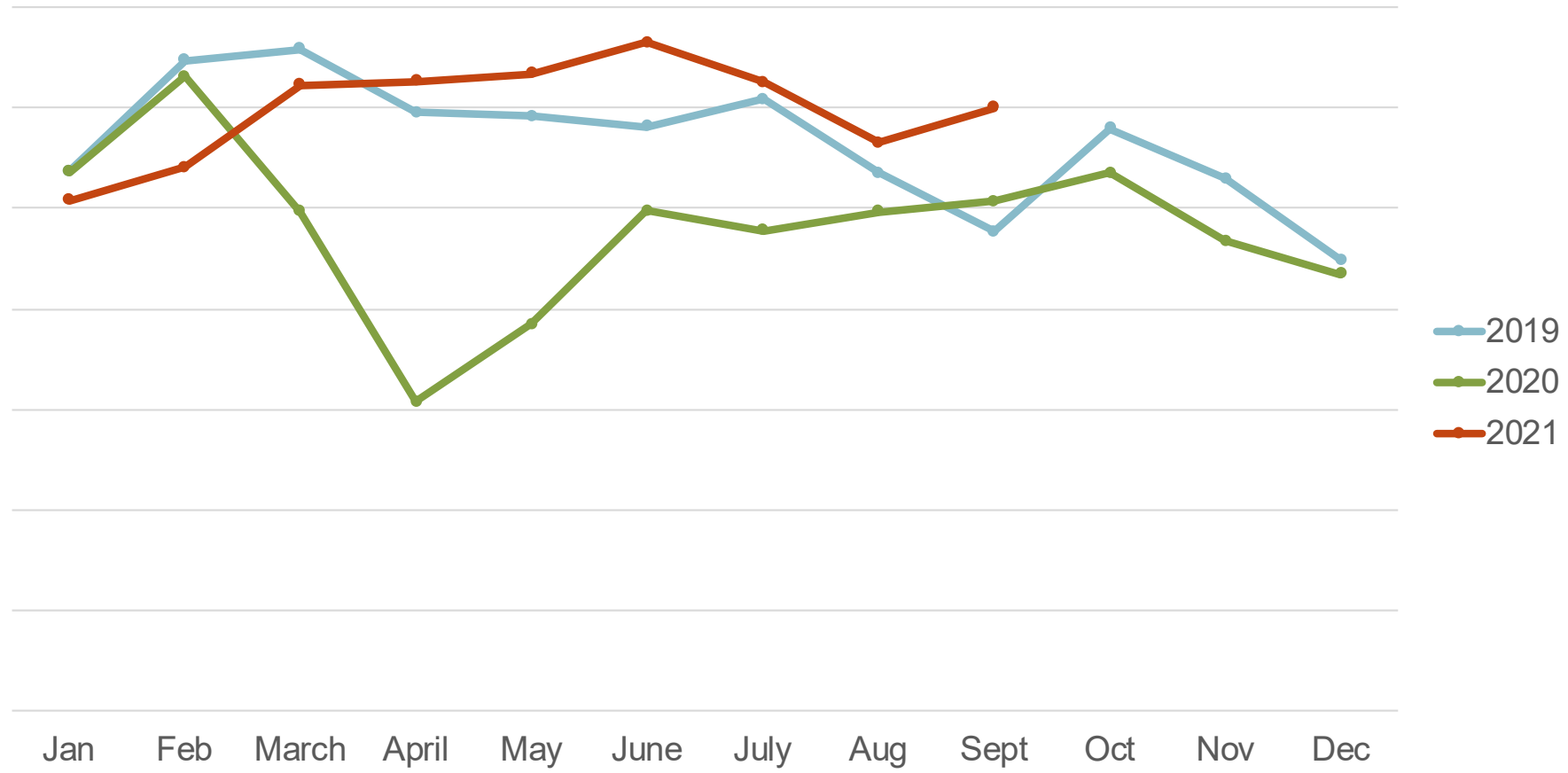
Tucson & Southern Region

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



# Lodging Occupancy

## Cochise County

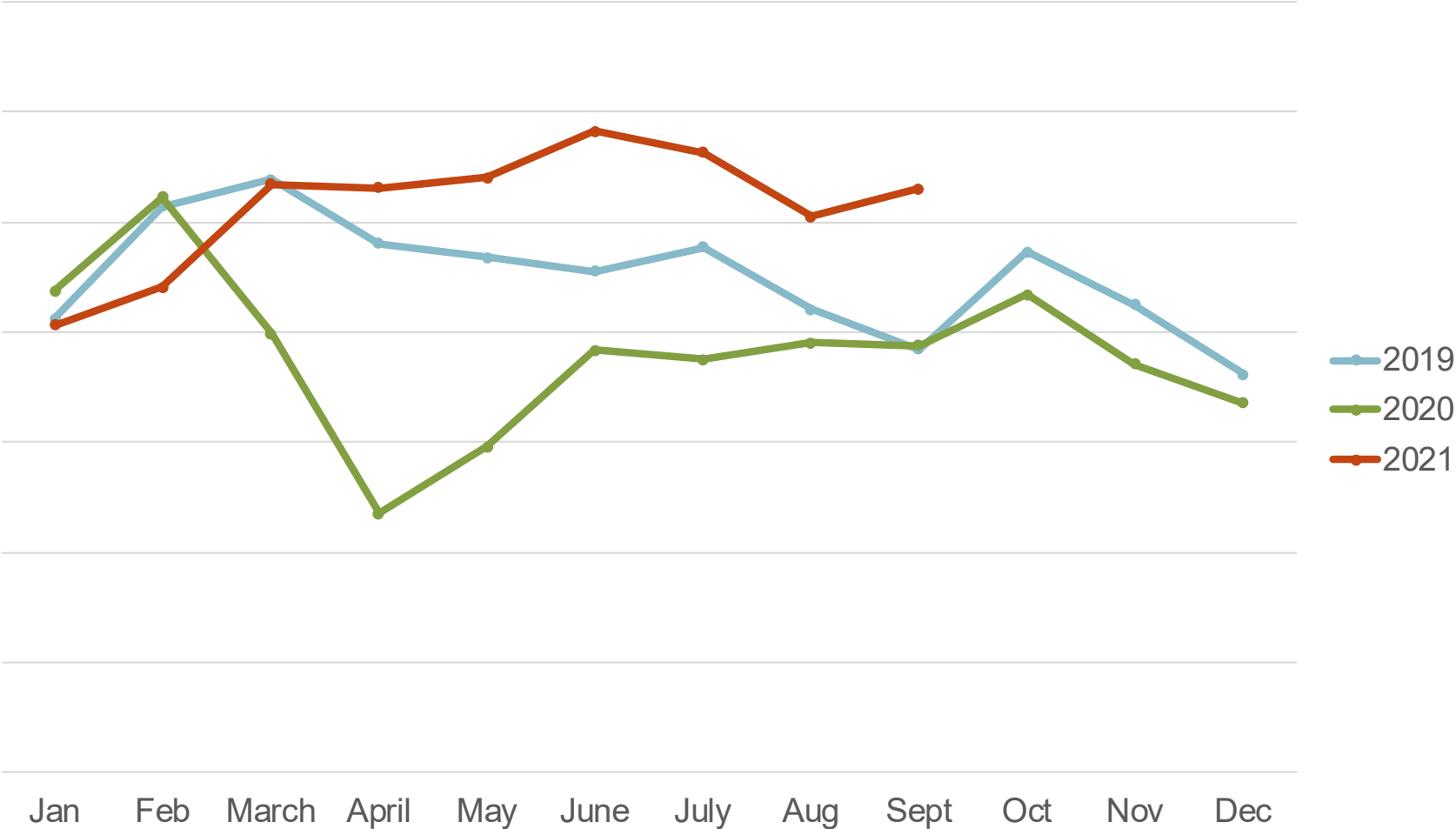


Source: STR, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.



# Lodging RevPAR

Cochise County

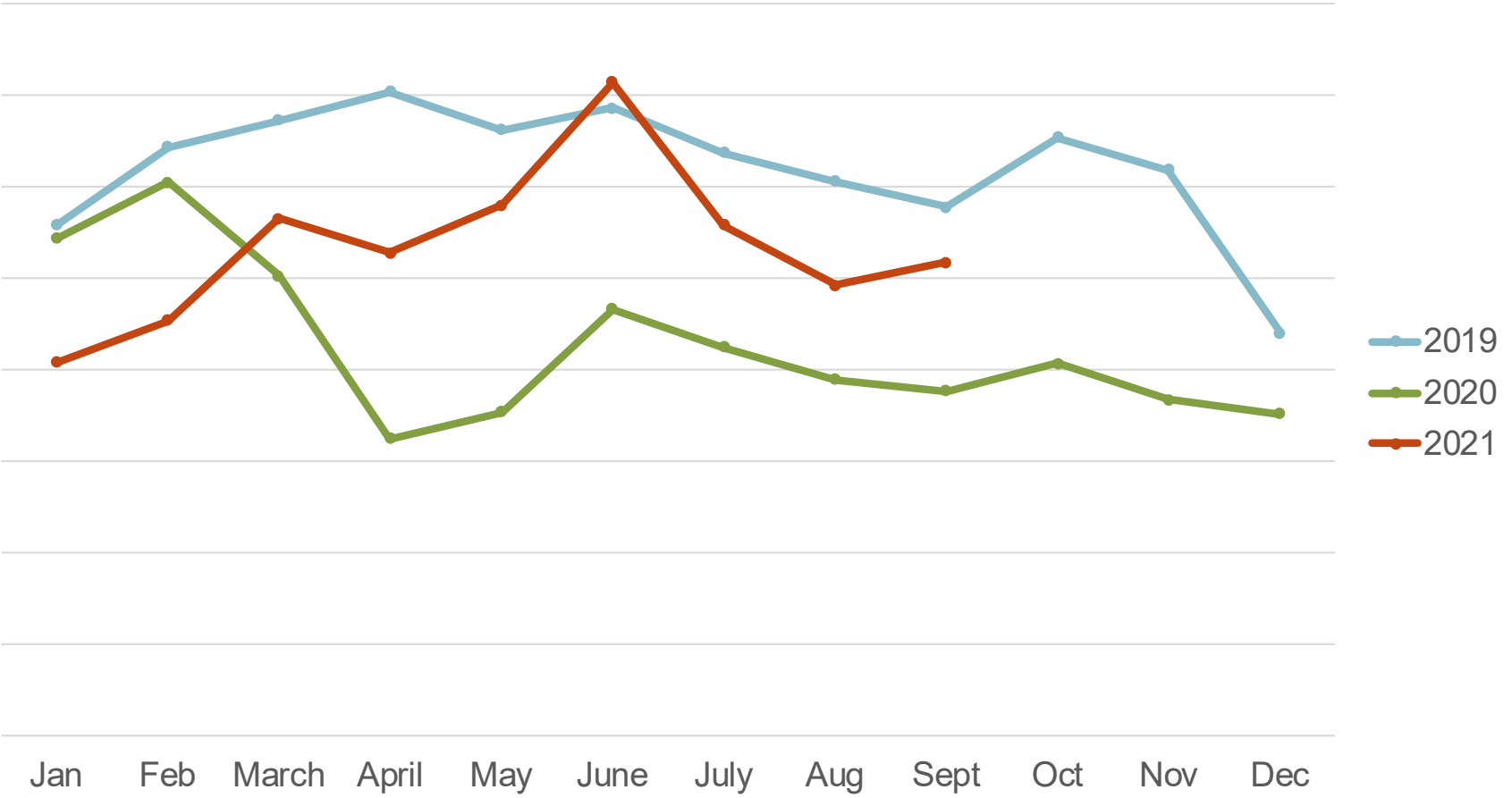


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# Lodging Occupancy

## Graham County

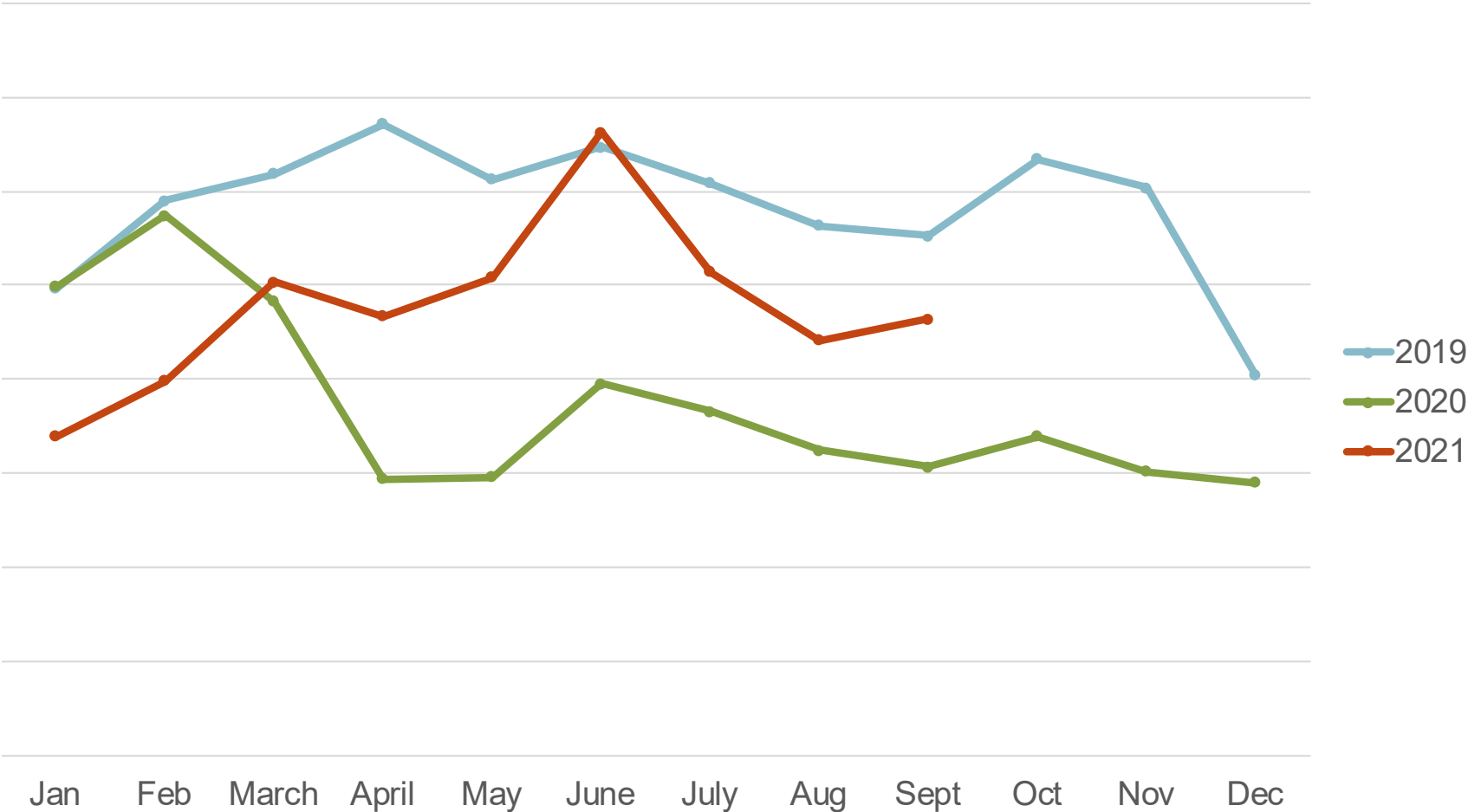


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# Lodging RevPAR

Graham County



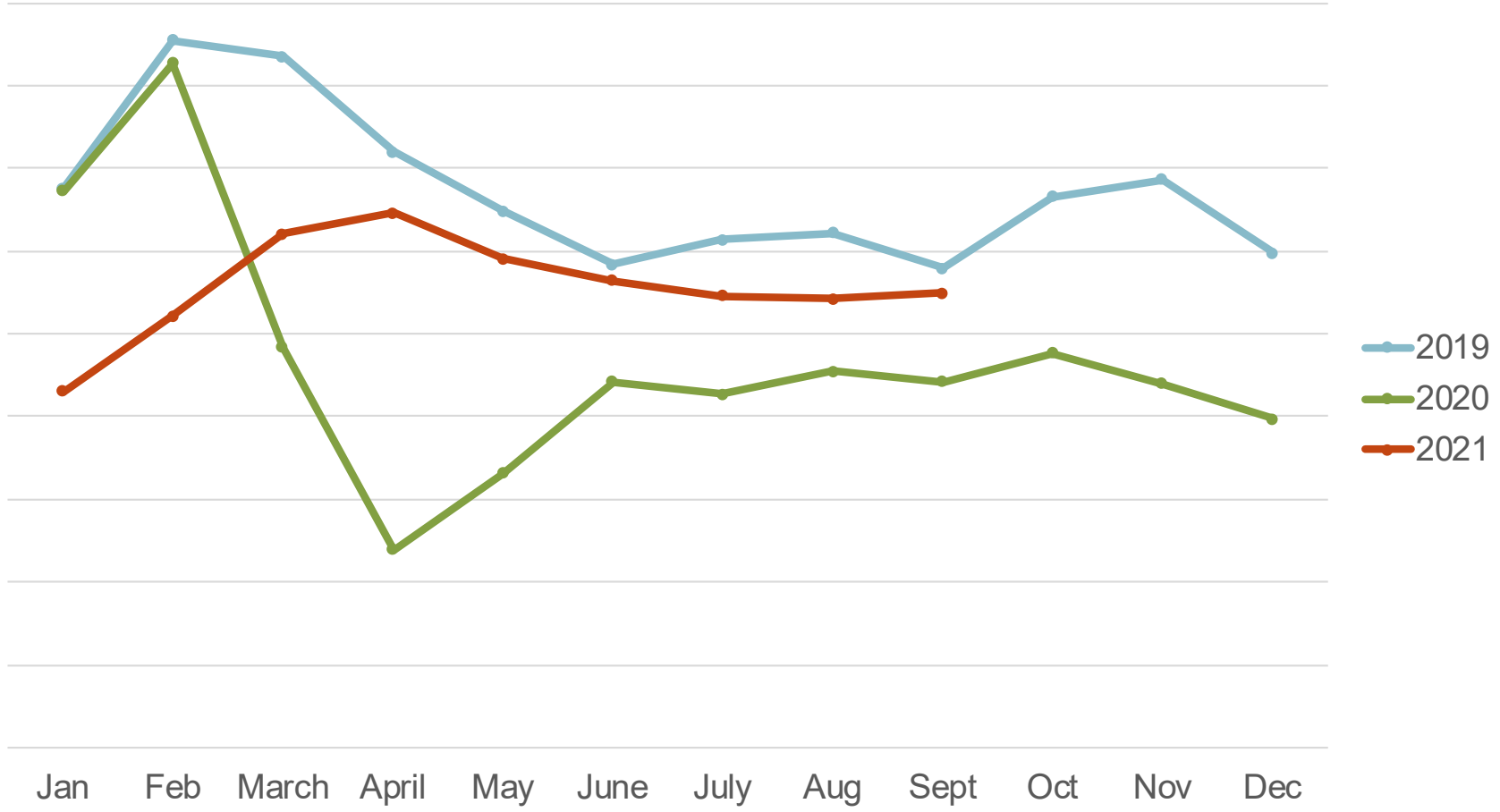
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# Lodging Occupancy

## Pima County

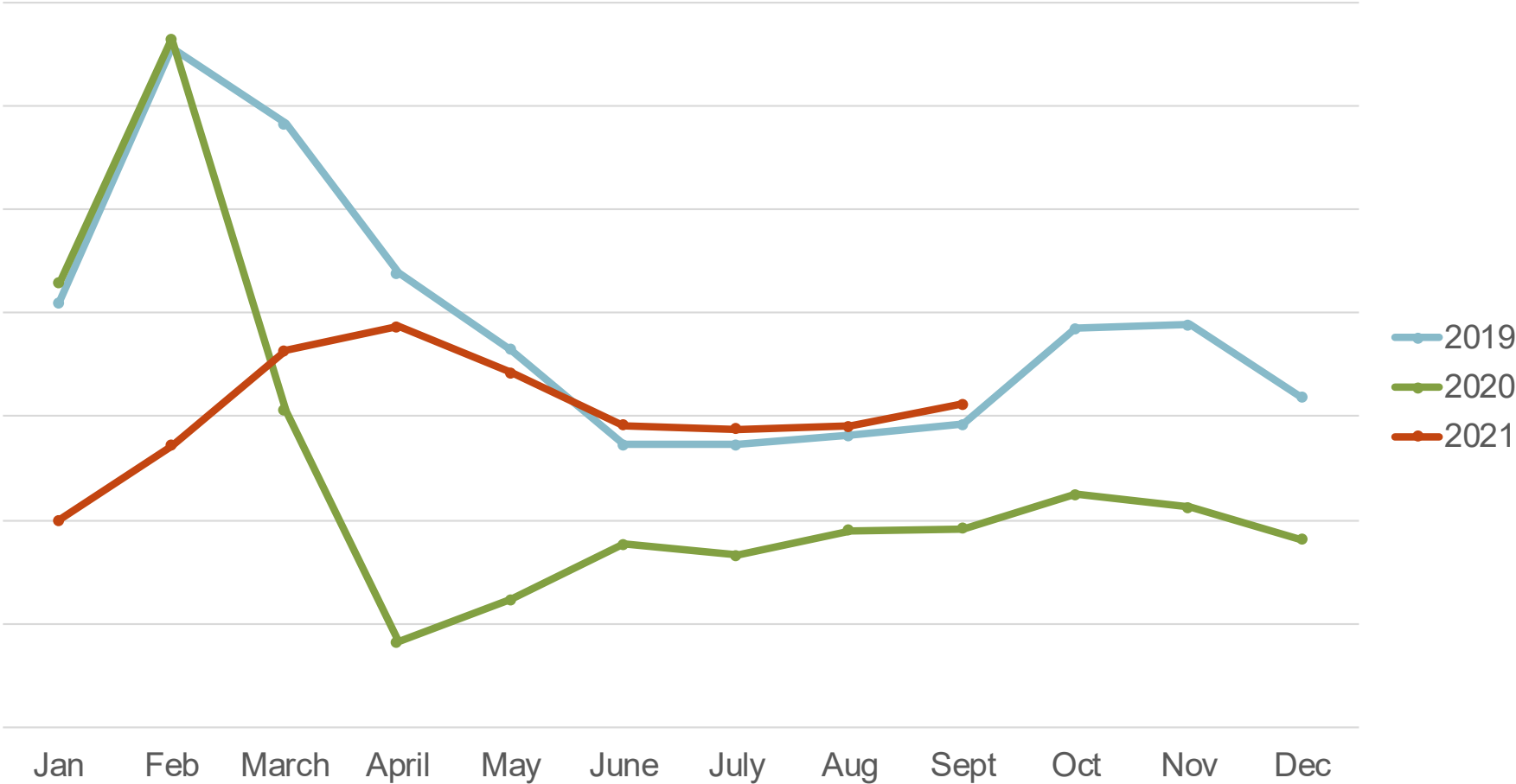


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# Lodging RevPAR

Pima County

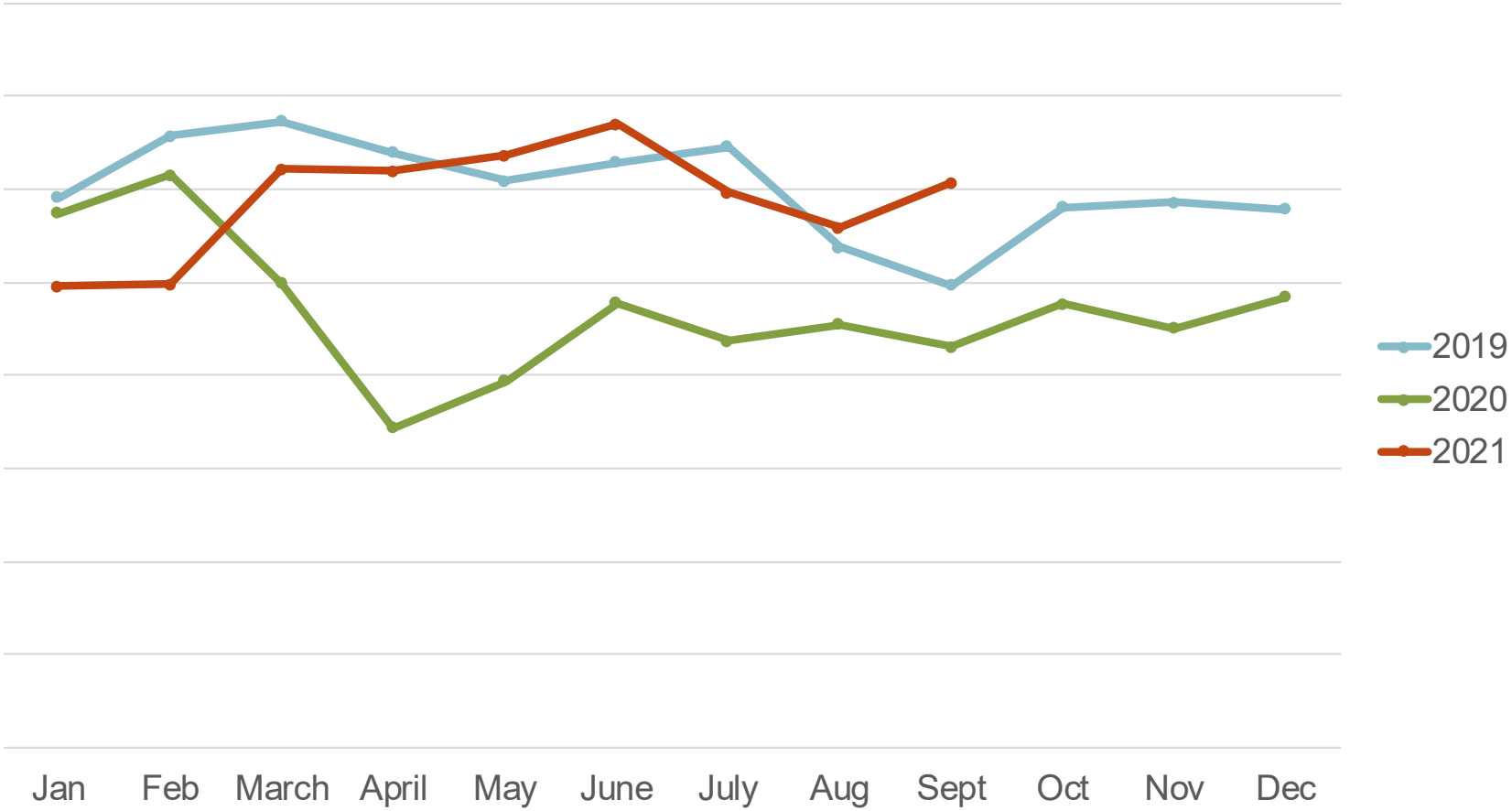


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# Lodging Occupancy

## Santa Cruz County

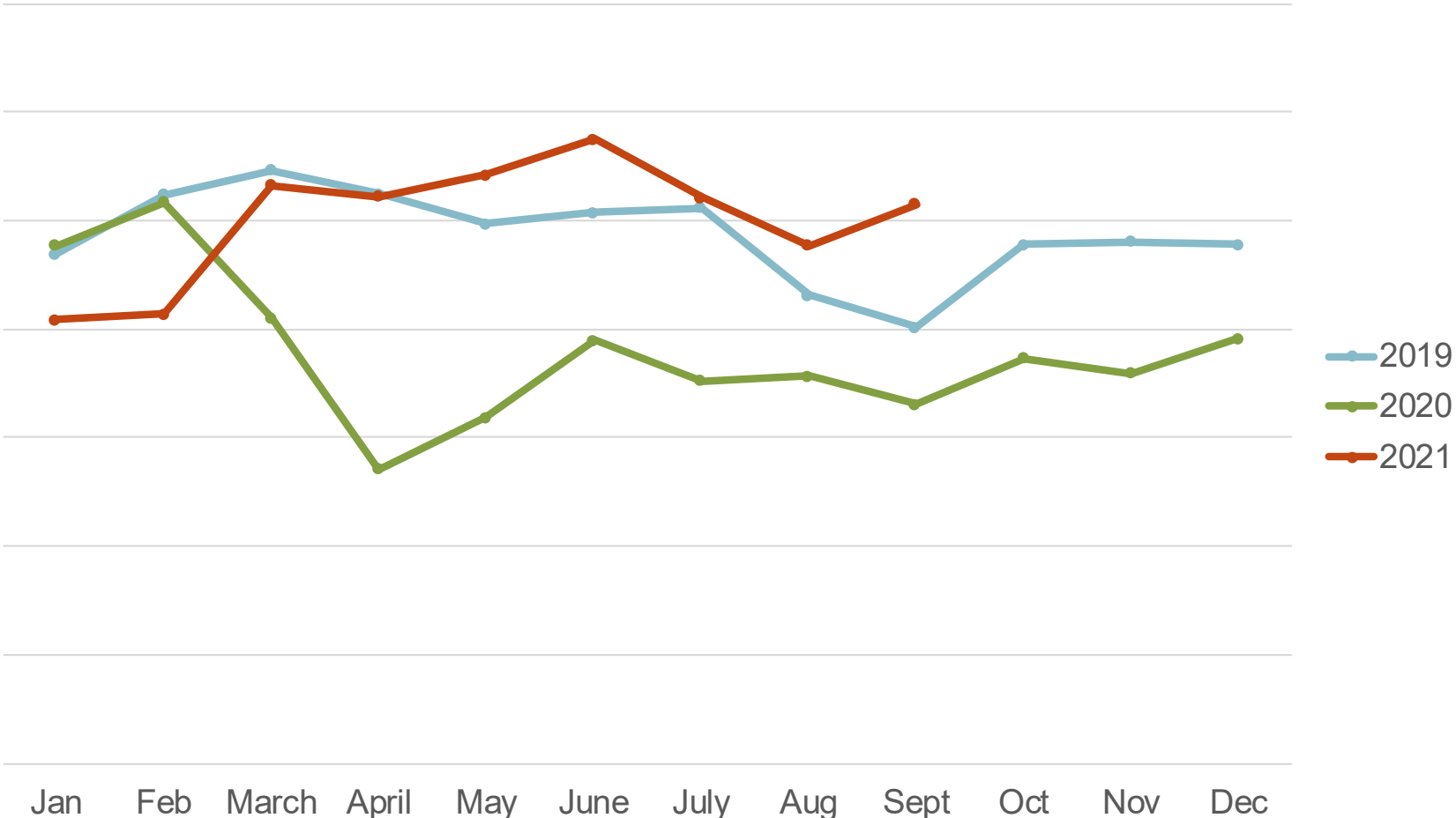


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# Lodging RevPAR

Santa Cruz County

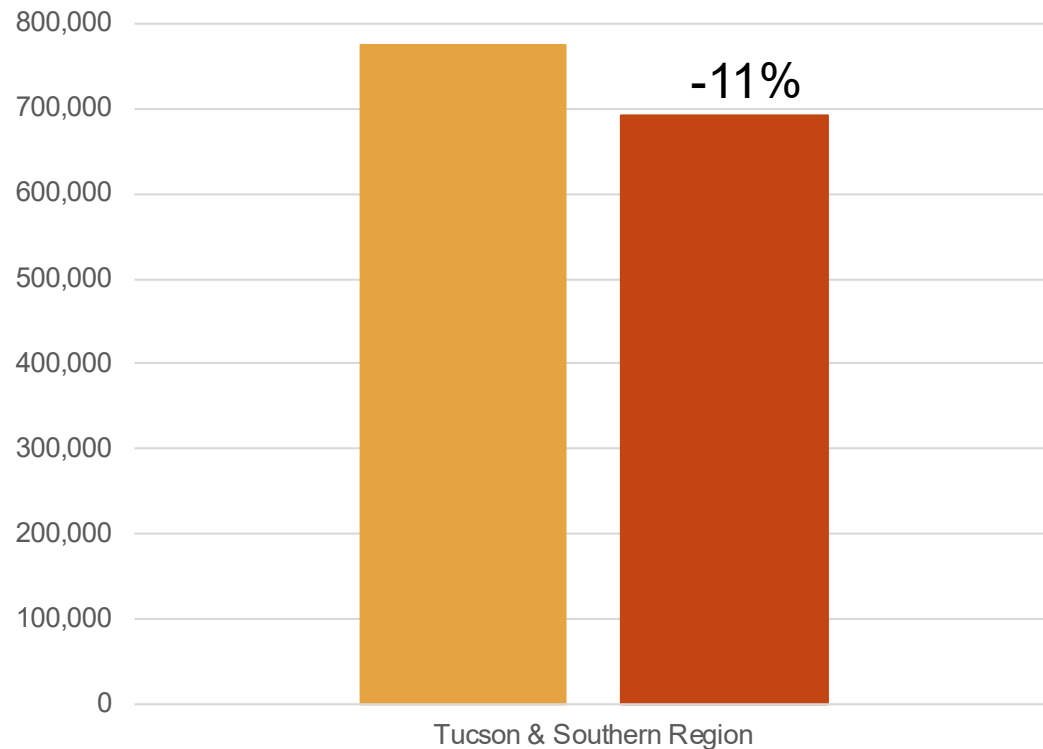


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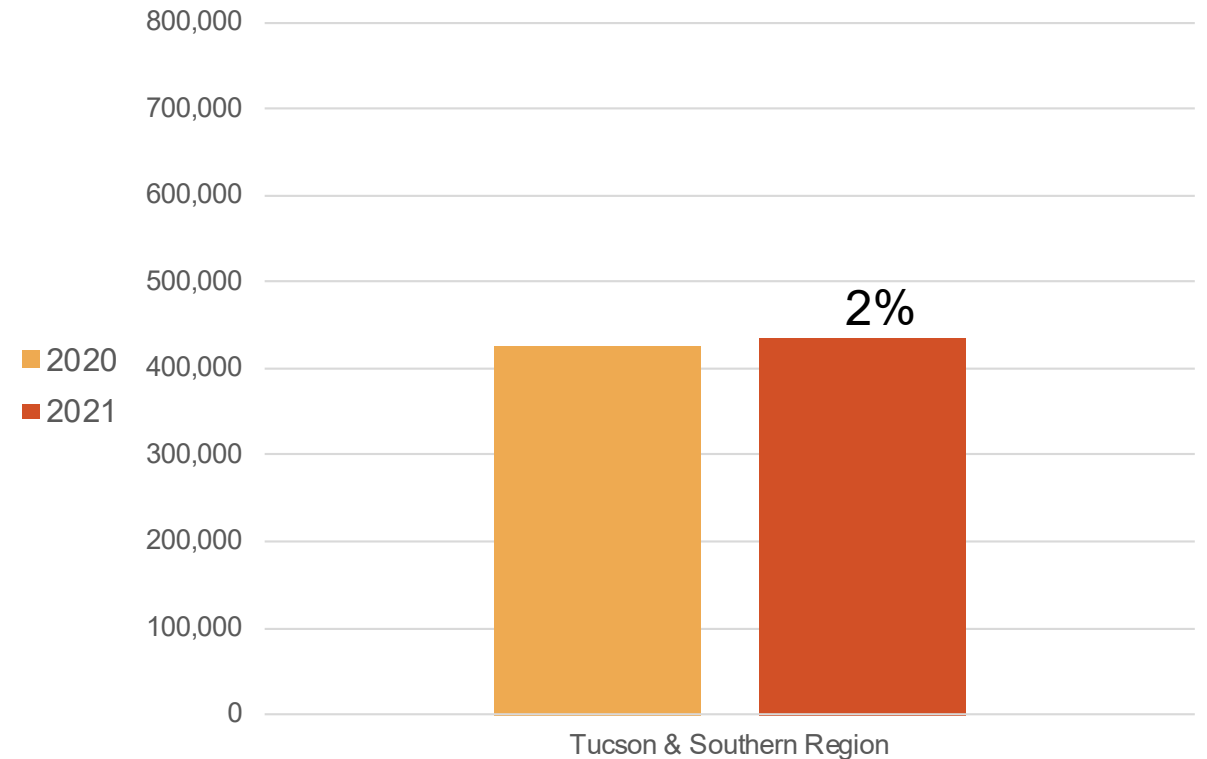
# Airbnb – Tucson & Southern Region

## YOY % Change

### Supply



### Demand

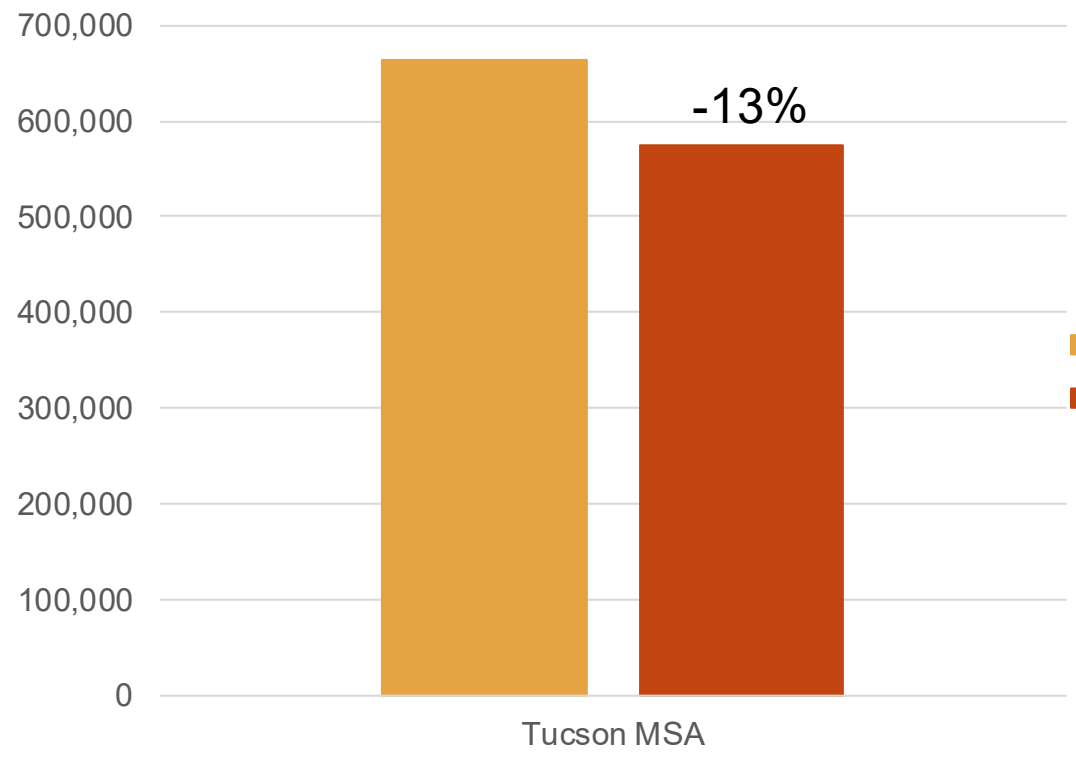




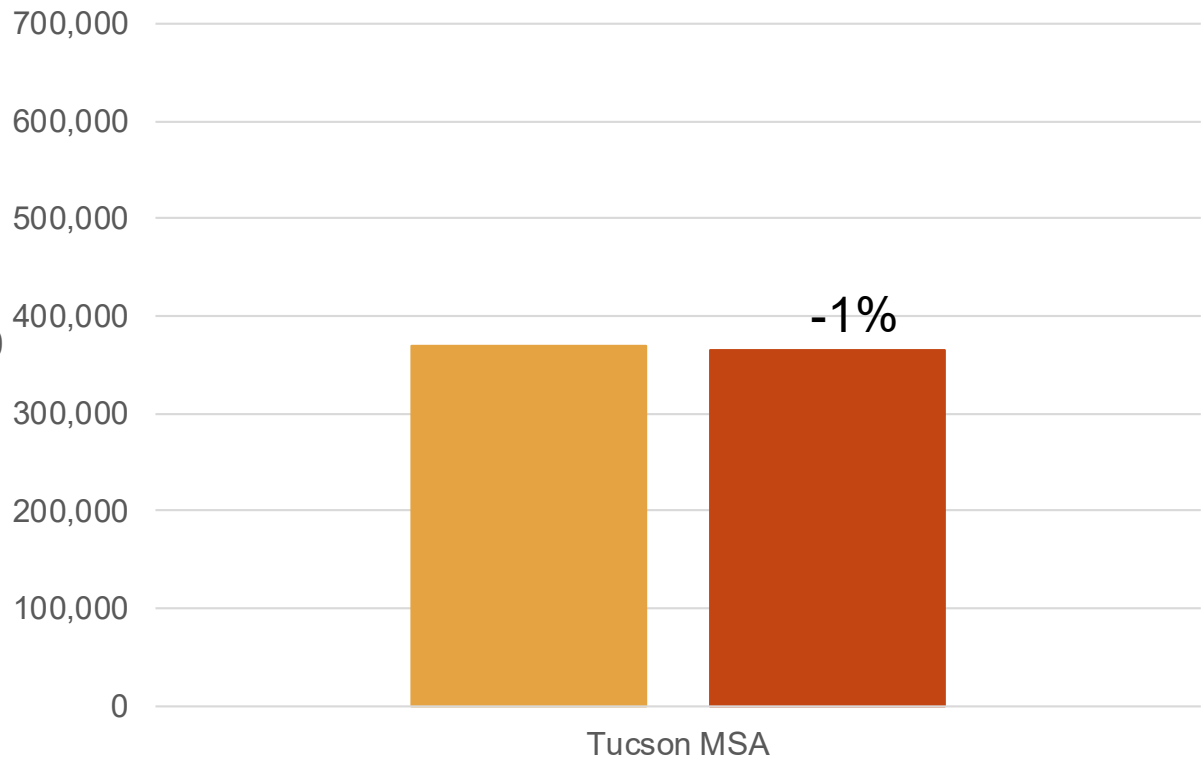
# Airbnb – City Level

## YOY % Change

### Supply



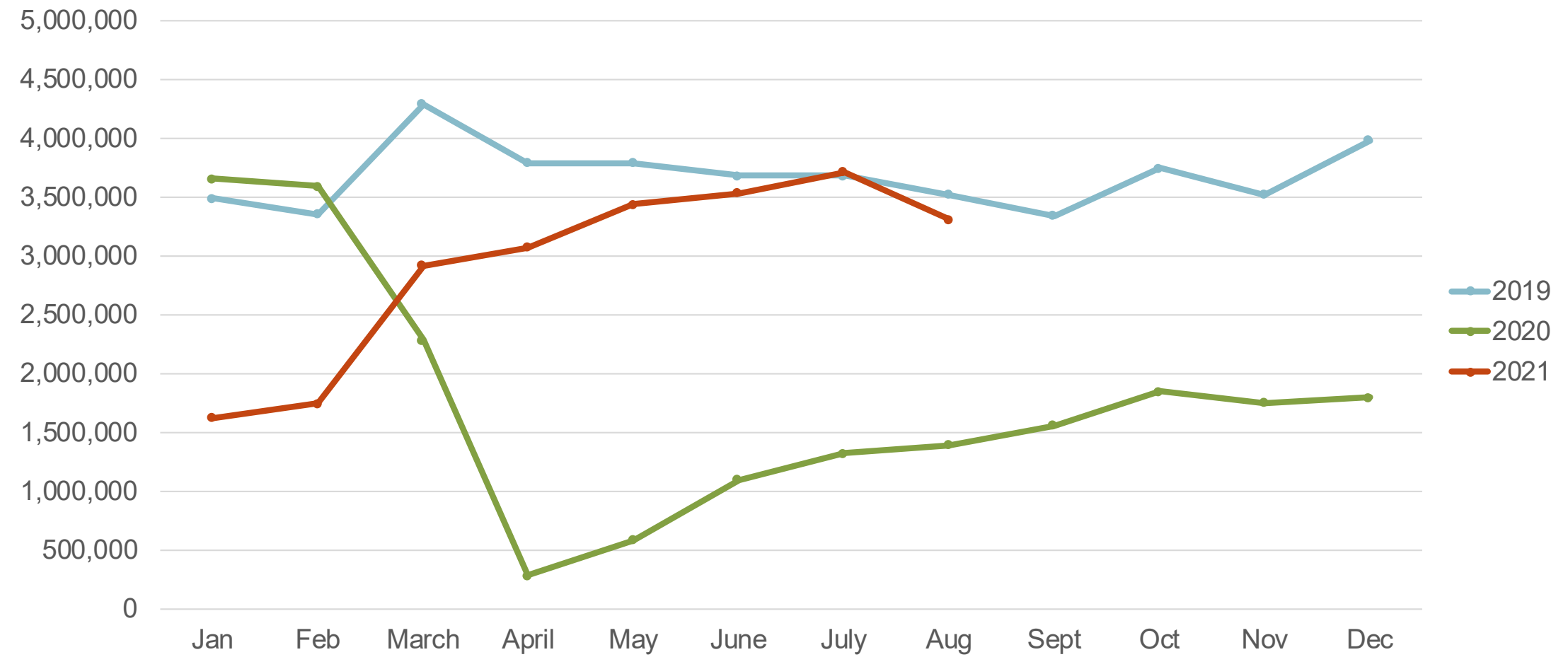
### Demand





# Airport Passenger Traffic

## Phoenix Sky Harbor - Domestic

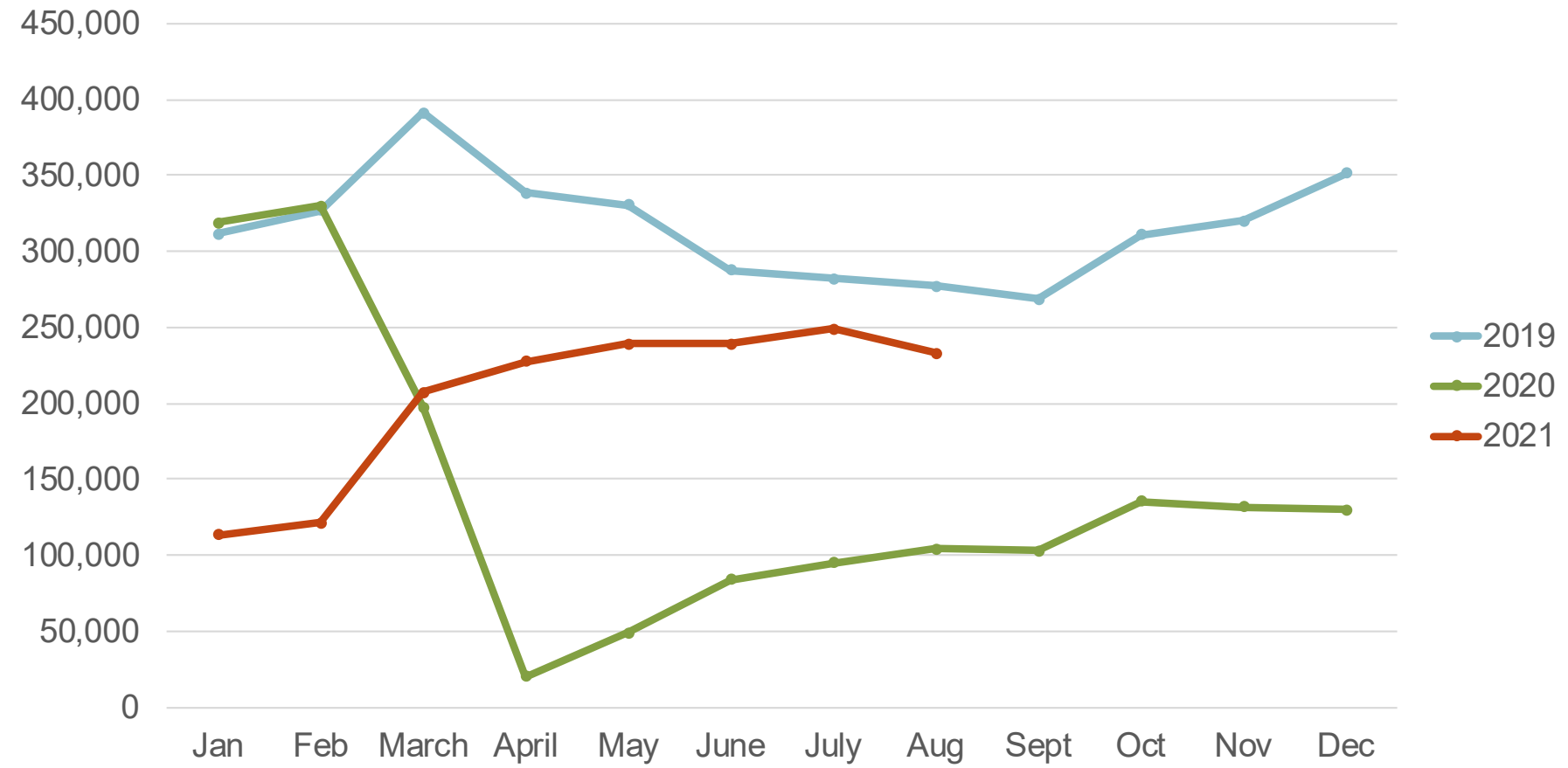


Source: [Airport Passenger Traffic](#), Northern Arizona University, Arizona Airports



# Airport Passenger Traffic

## Tucson & Southern Region



Includes: Tucson International Airport

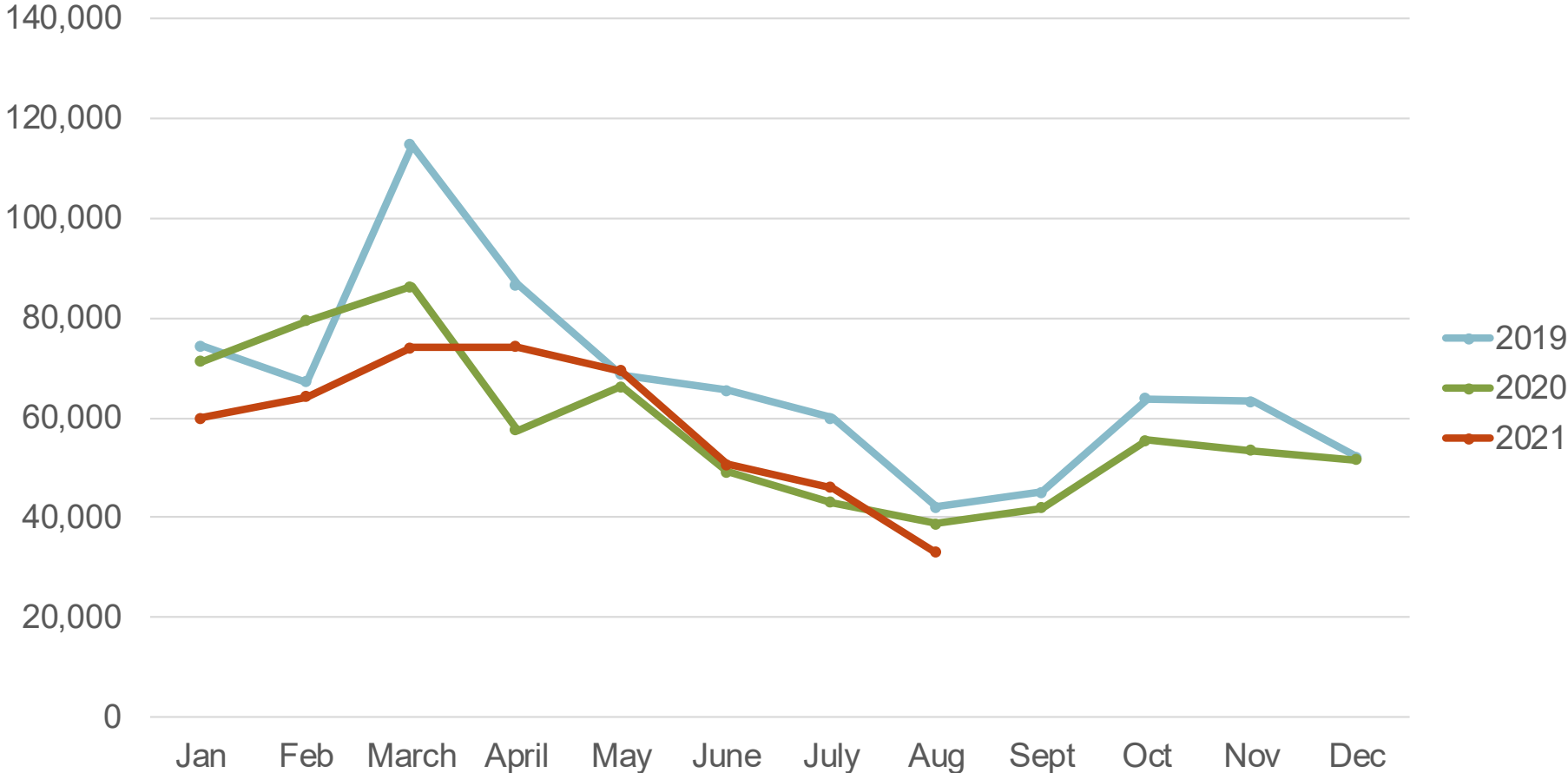
Source: [Airport Passenger Traffic](#), Northern Arizona University, Arizona Airports





# State Park Visitation

## Tucson & Southern Region



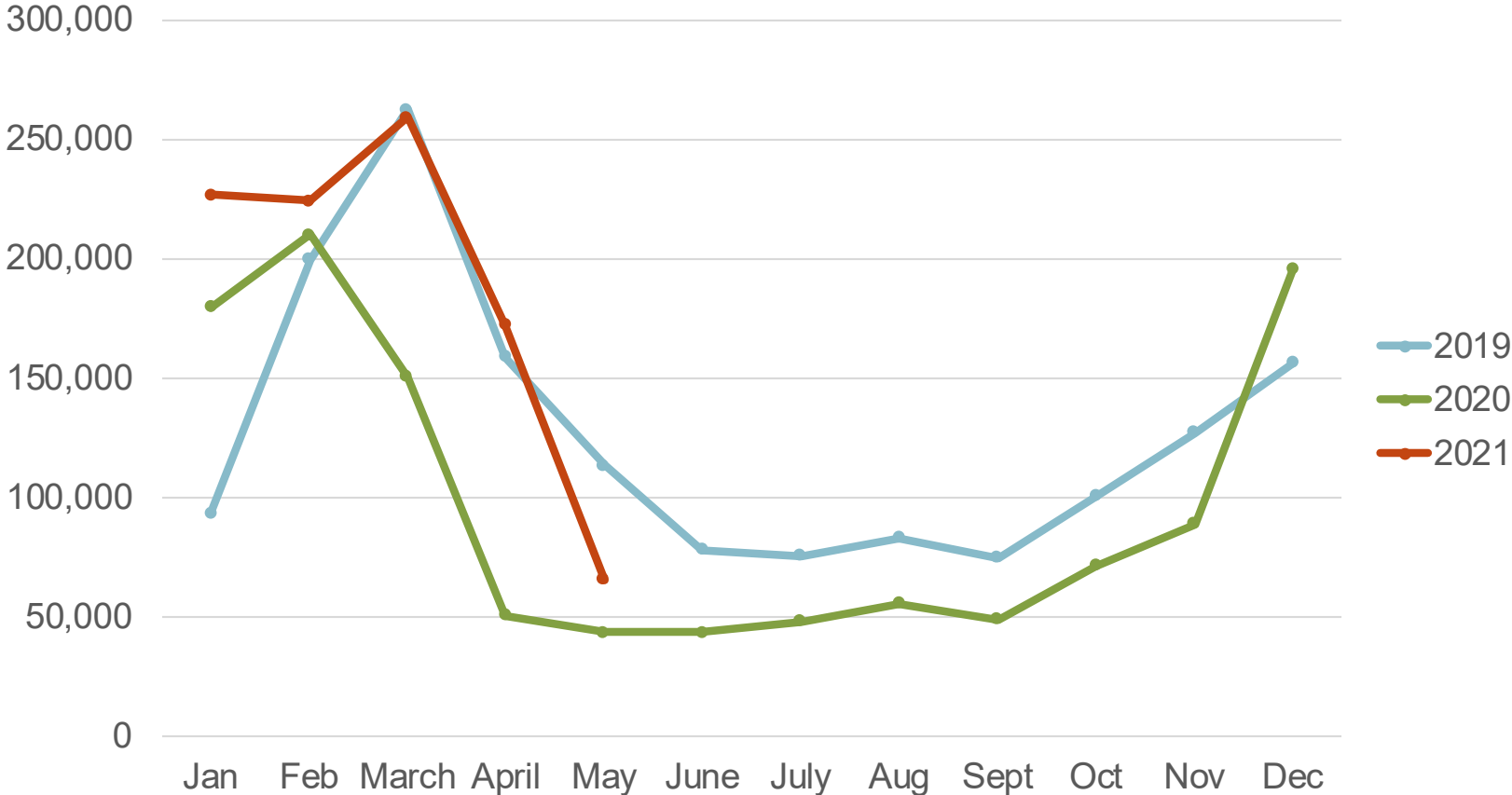
Includes: Catalina SP, Kartchner Caverns SP, Patagonia Lake SP, Roper Lake SP, Tombstone Courthouse SHP, Tubac Presidio SHP

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, Sagauo NP, Tumacacori NHP

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.

### **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.

### **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.

### **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.

### **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.

### **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.

### **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.

Visit [AppreciateAZ.com](https://tourism.az.gov/leavenotrace/) for tips on traveling sustainably in Arizona.



Brochure

Posters

Social Media Assets

Talking Points

Digital Courses

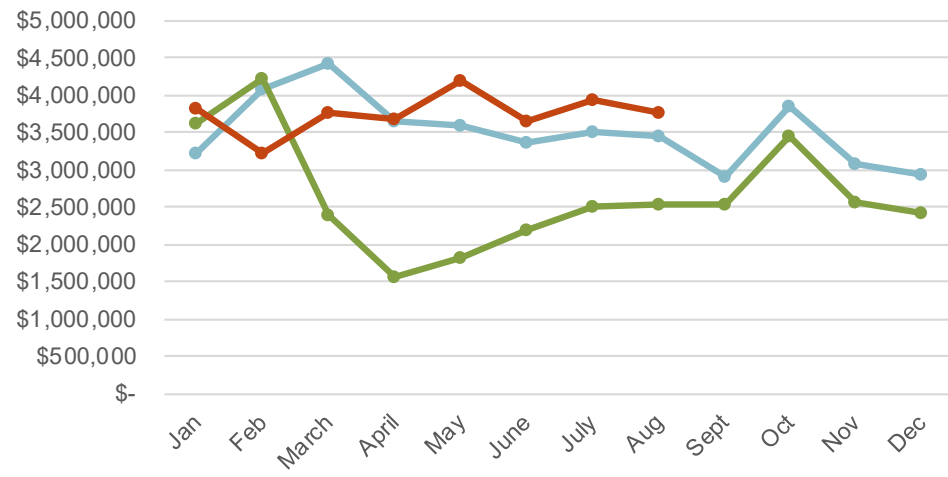
<https://tourism.az.gov/leavenotrace/>



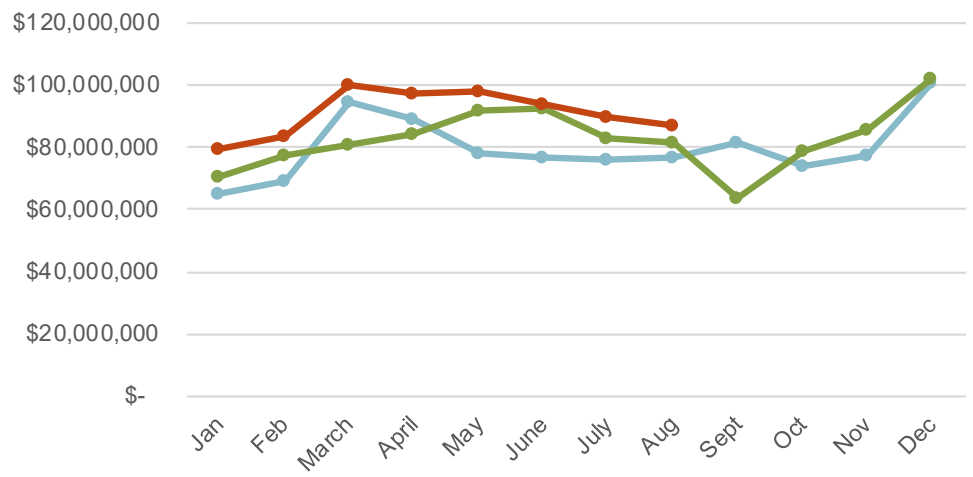
# Gross Sales

## Cochise County

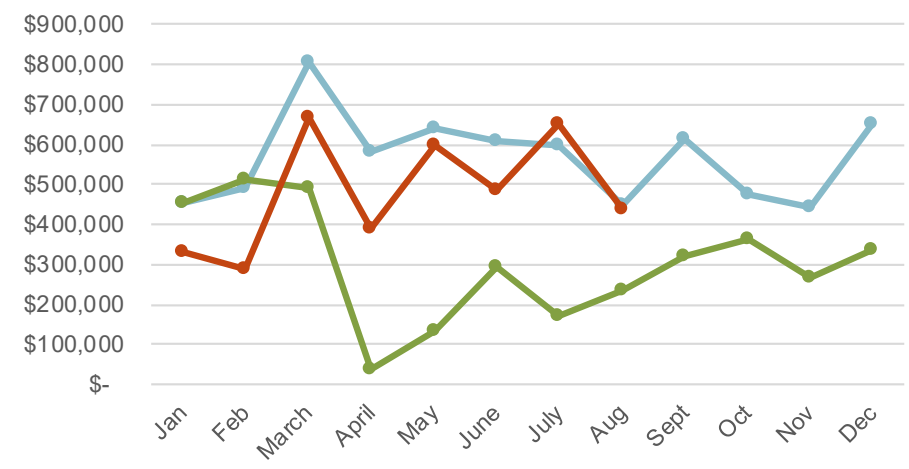
### Lodging



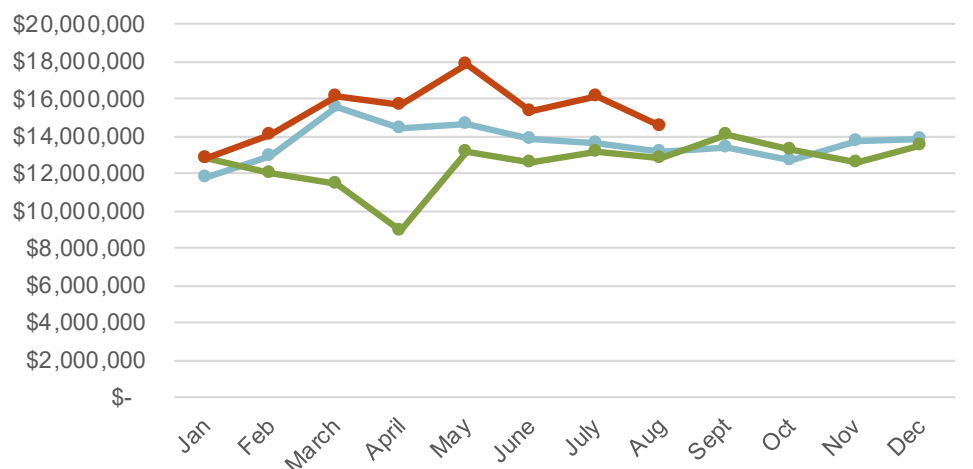
### Retail



### Amusement



### Restaurant/Bar



— 2019  
— 2020  
— 2021

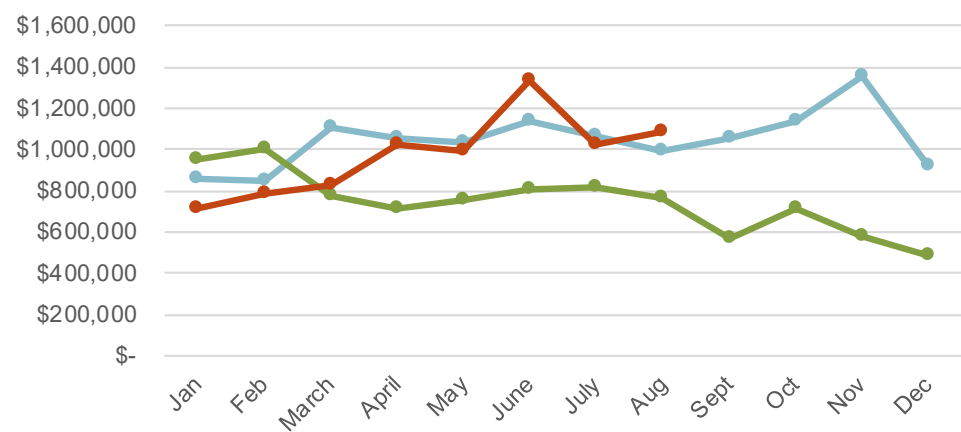
Source: [Northern Arizona University's Economic Policy Institute](https://www.northernarizona.edu/economic-policy-institute), Arizona Department of Revenue



# Gross Sales

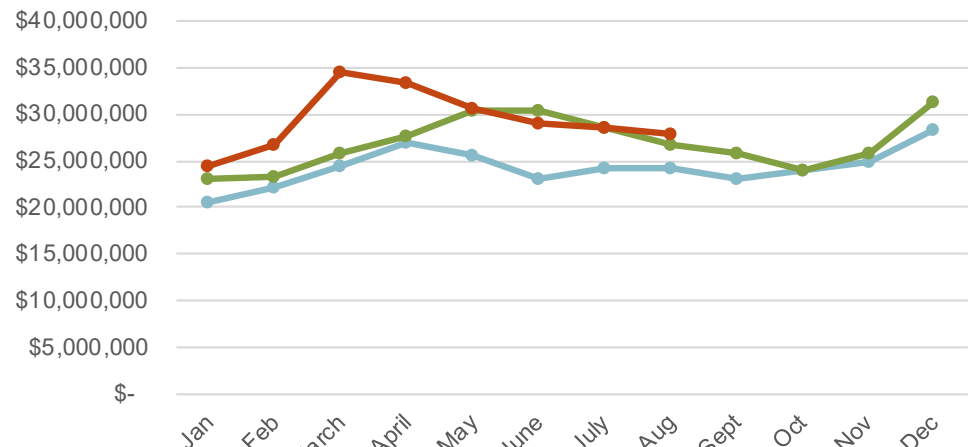
## Graham County

### Lodging Graham/Greenlee

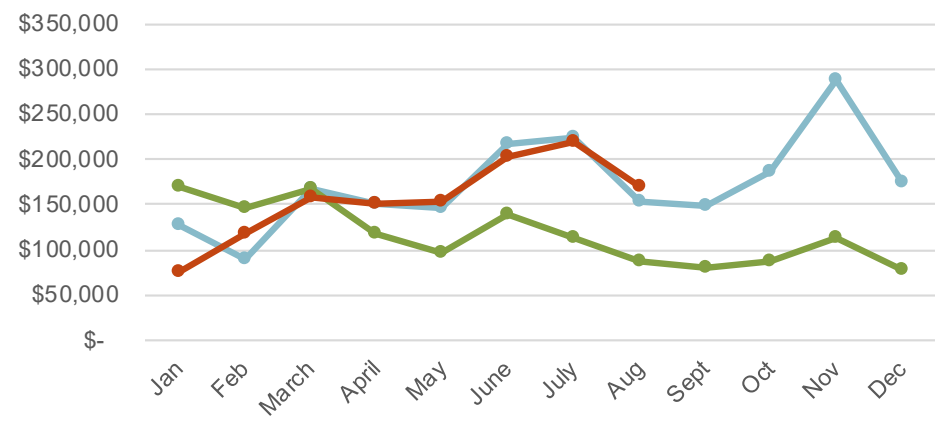


— 2019  
— 2020  
— 2021

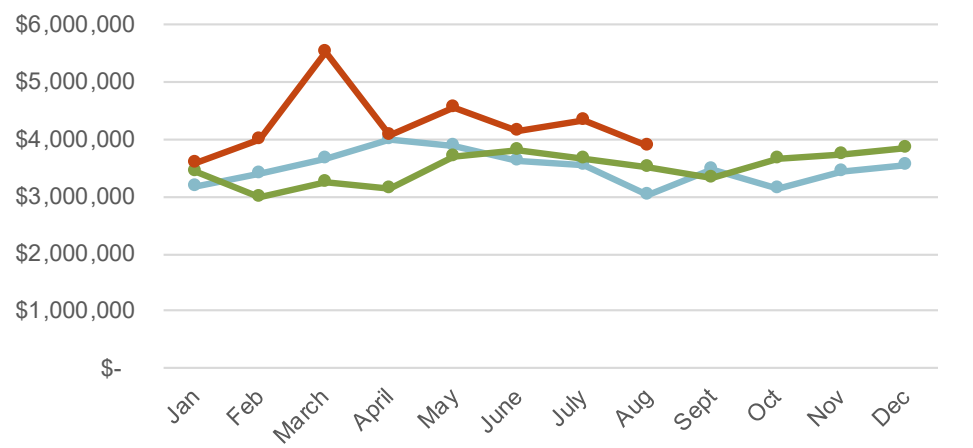
### Retail



### Amusement Graham/Greenlee/La Paz



### Restaurant/Bar

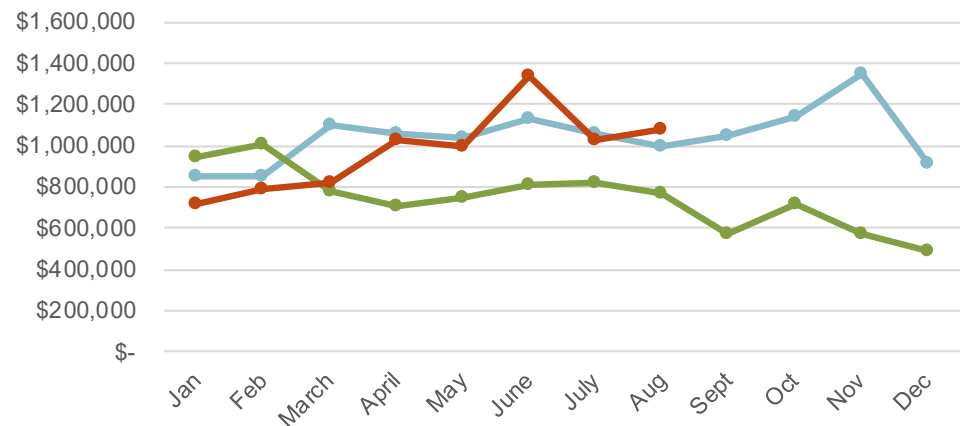


Source: [Northern Arizona University's Economic Policy Institute](https://www.northernarizona.edu/economic-policy-institute), Arizona Department of Revenue

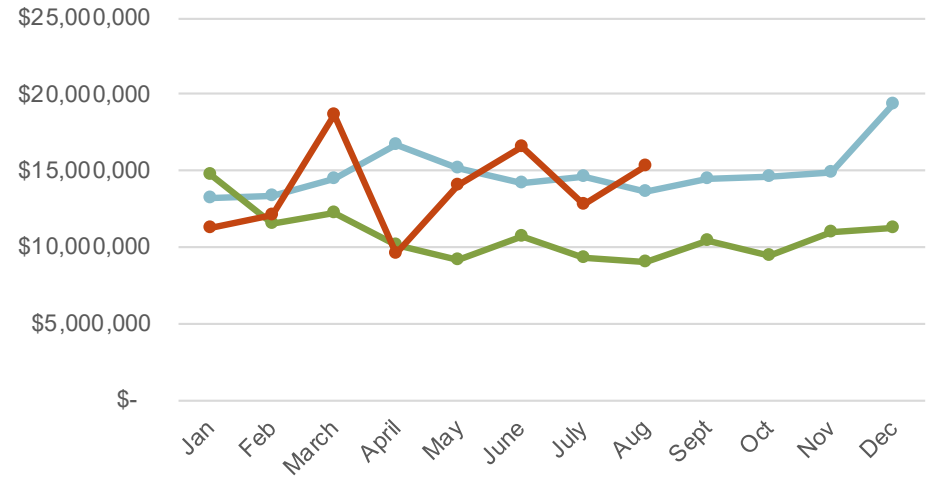
# Gross Sales

## Greenlee County

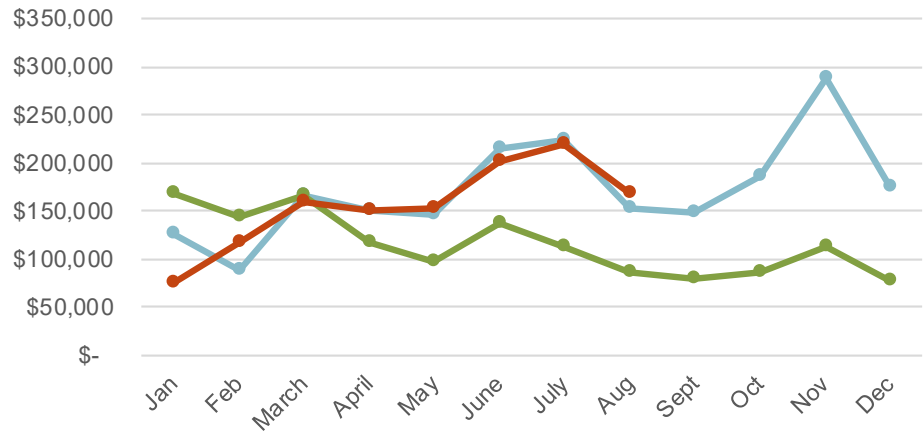
### Lodging Graham/Greenlee



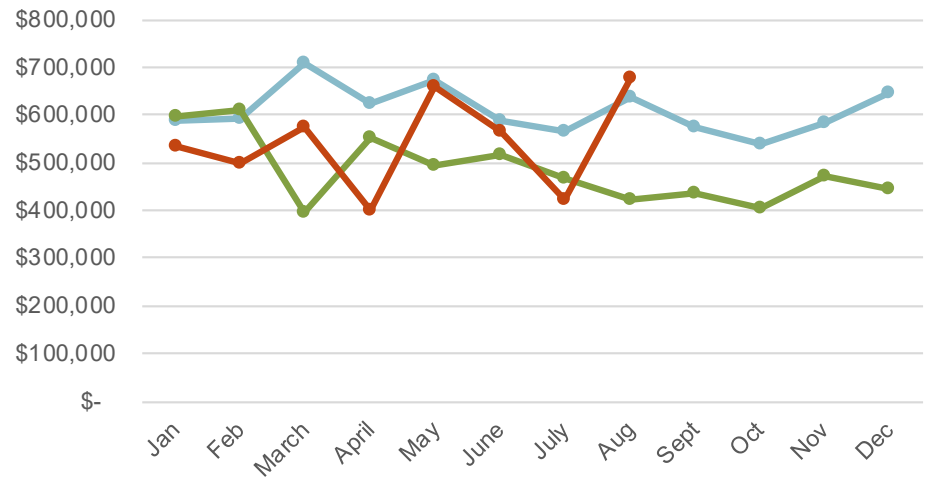
### Retail



### Amusement Graham/Greenlee/LaPaz



### Restaurant/Bar



— 2019  
— 2020  
— 2021

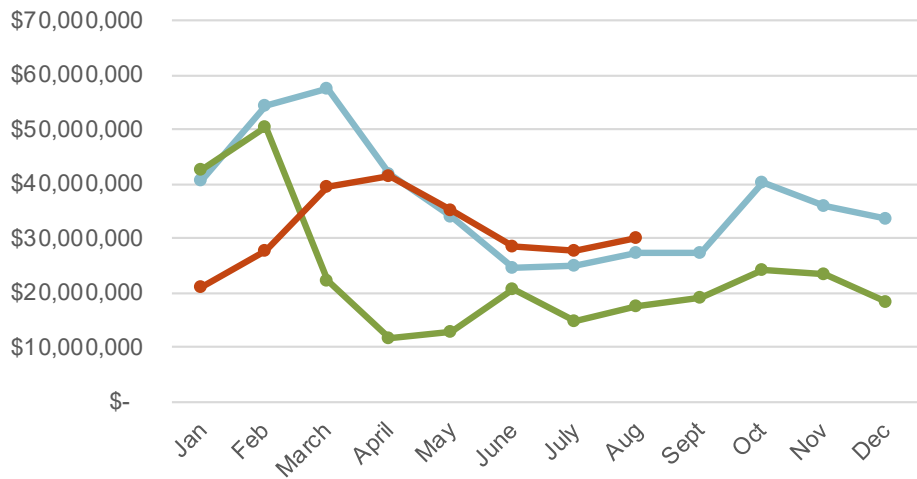
Source: [Northern Arizona University's Economic Policy Institute](https://www.northernarizona.edu/economic-policy-institute), Arizona Department of Revenue



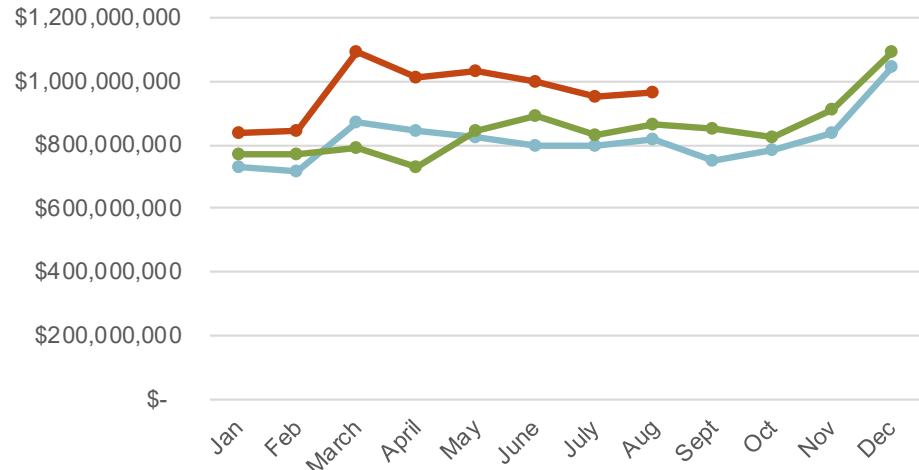
# Gross Sales

## Pima County

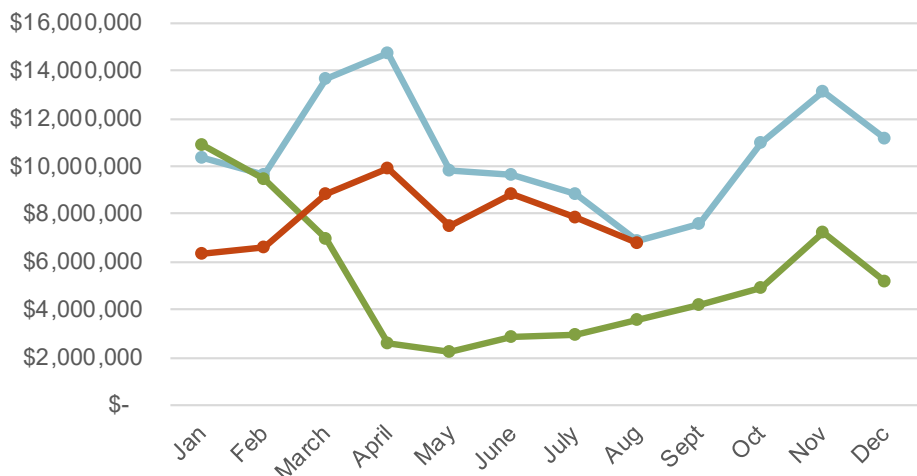
### Lodging



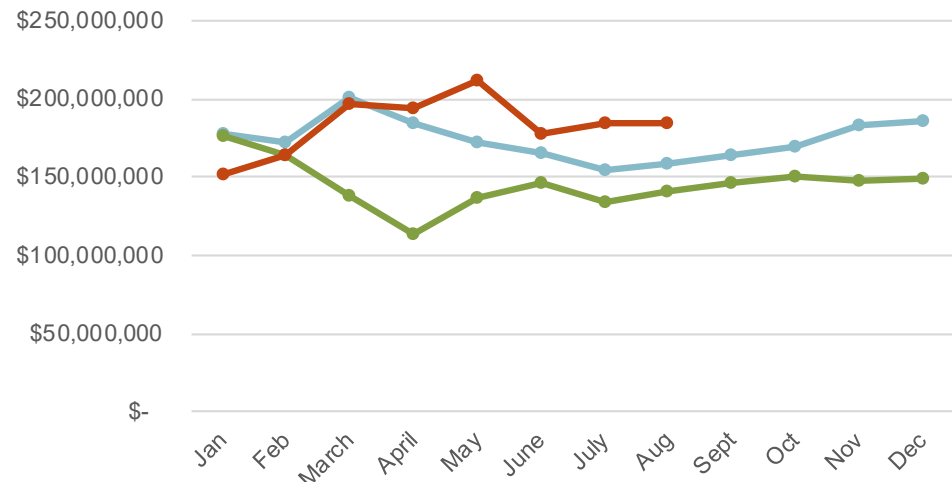
### Retail



### Amusement



### Restaurant/Bar

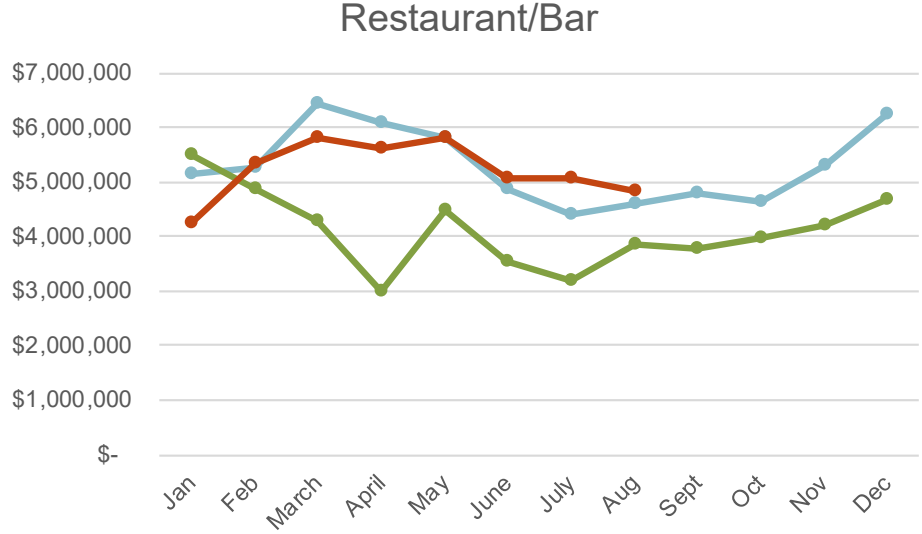
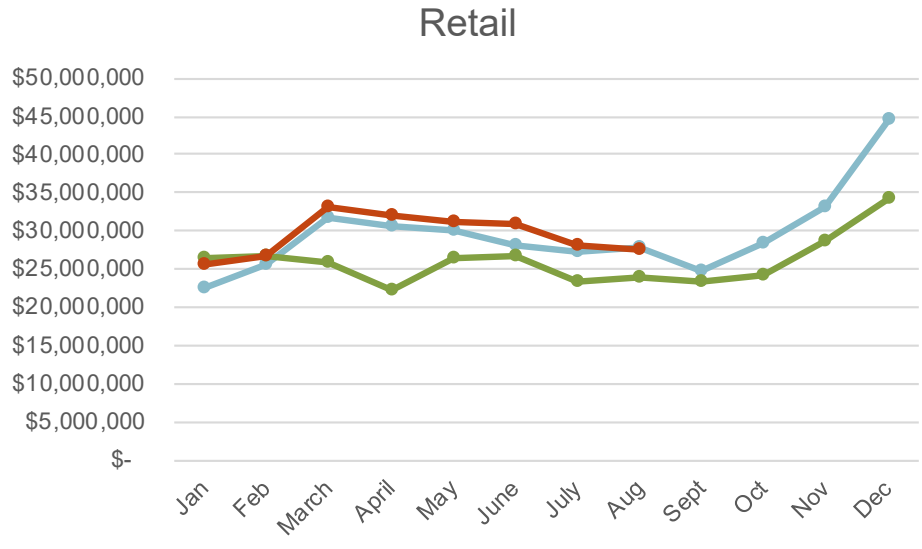
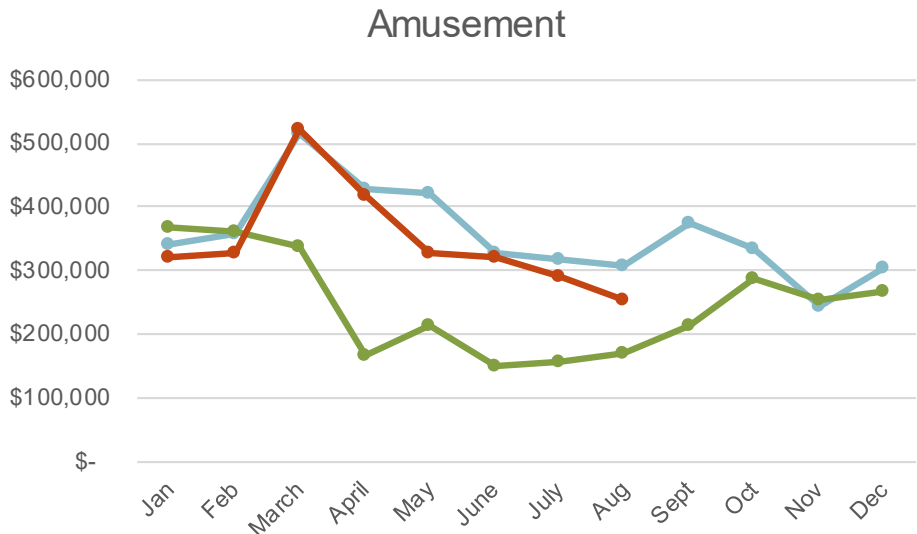
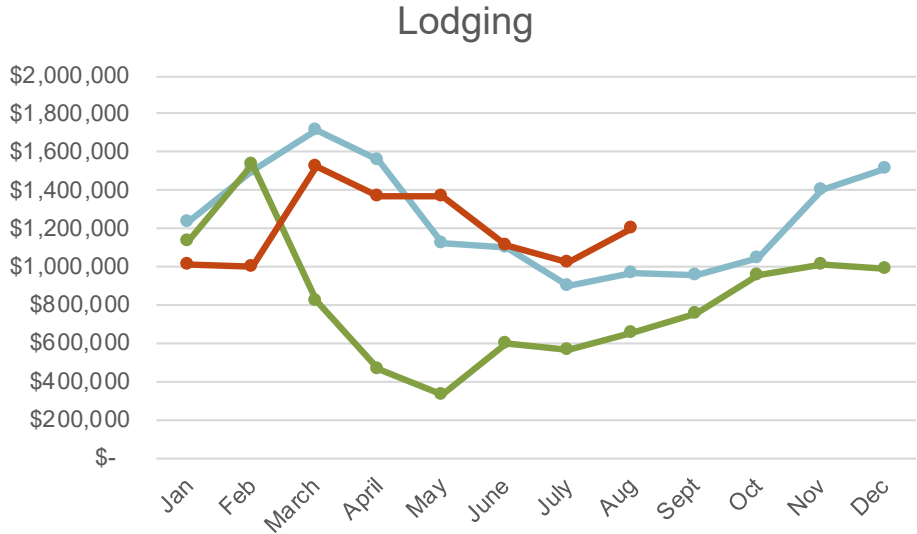


— 2019  
— 2020  
— 2021

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

# Gross Sales

## Santa Cruz County



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

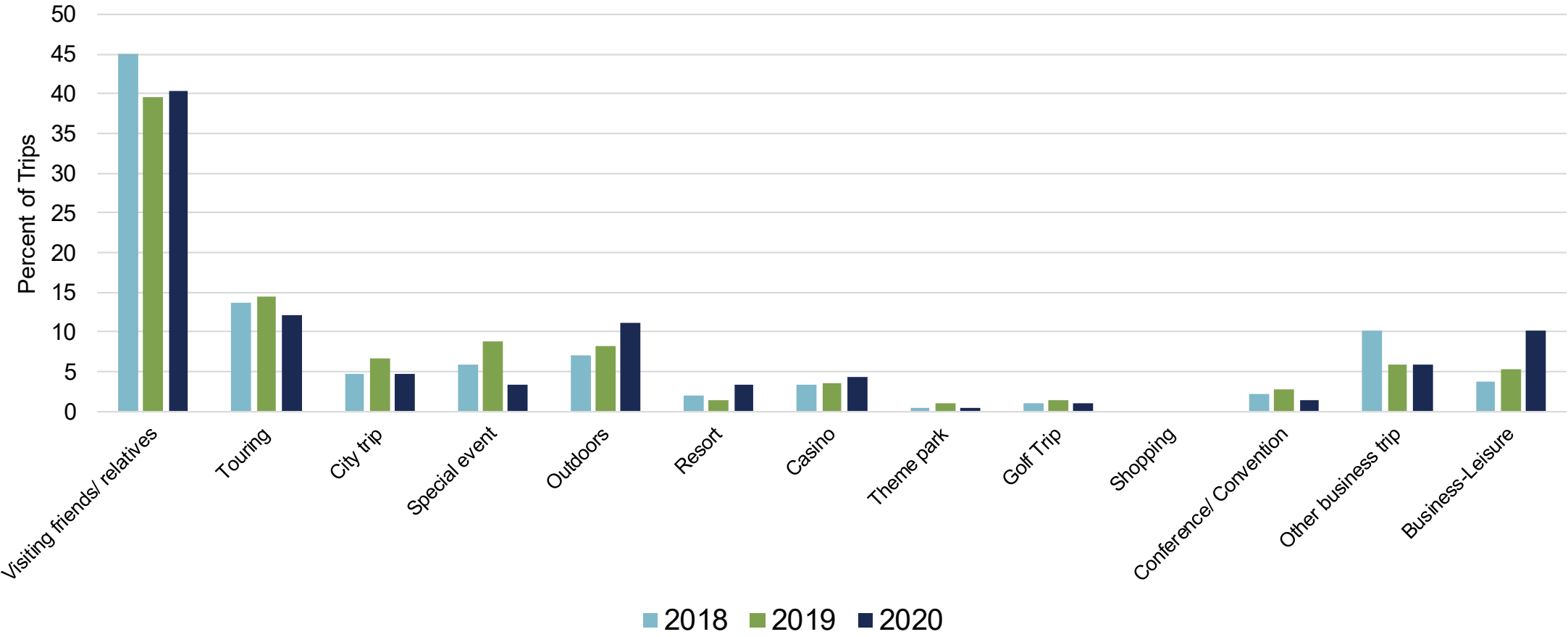




# Traveler Behaviors

# Main Purpose of Trip Trend

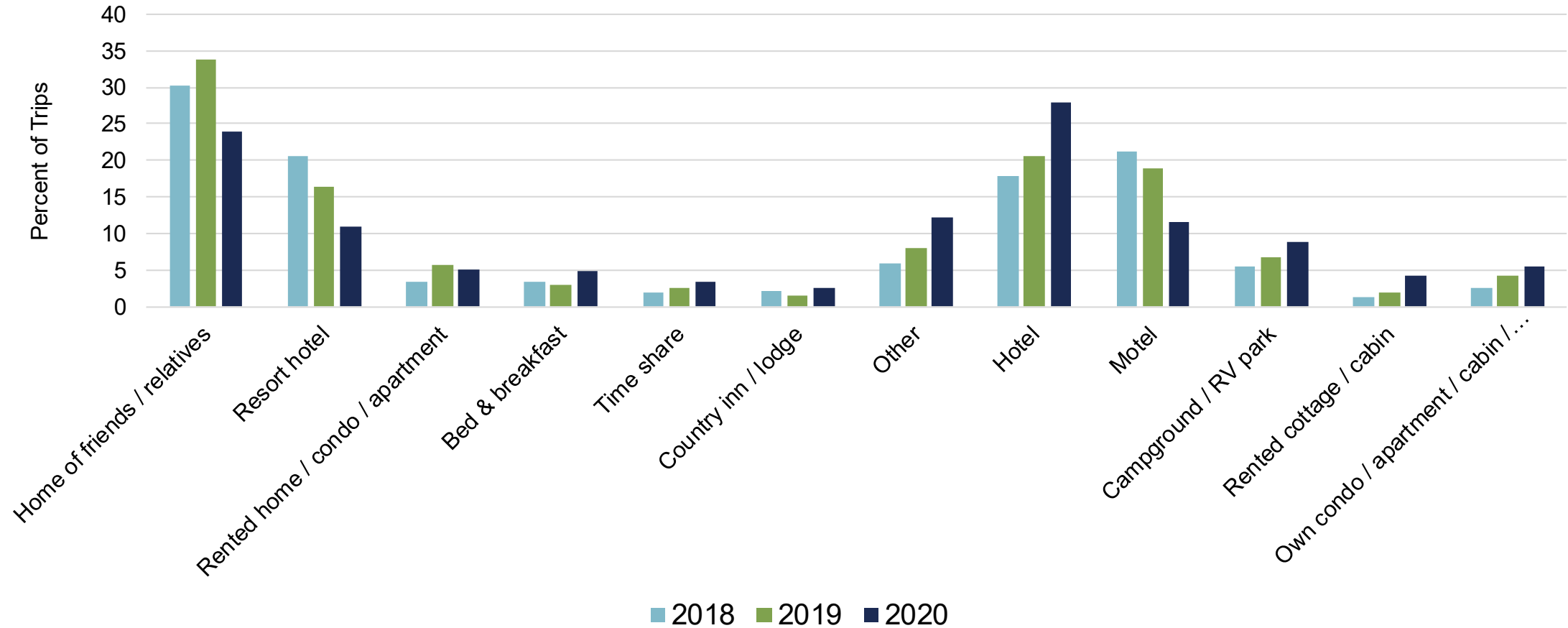
## Tucson & Southern Region



Source: Longwoods International

# Accommodation Choice Trend

## Tucson & Southern Region



Source: Longwoods International

# Top Origin Markets Tucson & Southern Region

DMA	Percent of Trips in 2018
Phoenix, AZ	25
Tucson (Nogales), AZ	13
Los Angeles, CA	8
Chicago, IL	3
New York, NY	2
Albuquerque-Santa Fe, NM	2
Minneapolis-St. Paul, MN	2
San Francisco-Oakland-San Jose, CA	2
Sacramento-Stockton-Modesto, CA	2
Denver, CO	2

DMA	Percent of Trips in 2019
Phoenix, AZ	23
Tucson (Nogales), AZ	14
Los Angeles, CA	7
Seattle-Tacoma, WA	3
Chicago, IL	3
San Diego, CA	2
Albuquerque-Santa Fe, NM	2
Denver, CO	2
Philadelphia, PA	2
New York, NY	2

DMA	Percent of Trips in 2020
Phoenix, AZ	22
Tucson (Nogales), AZ	16
Los Angeles, CA	7
New York, NY	4
Denver, CO	3
San Diego, CA	2
Chicago, IL	2
Seattle-Tacoma, WA	2
Las Vegas, NV	2
Sacramento-Stockton-Modesto, CA	2

Source: Longwoods International

# Top Origin Markets 2021

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

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

Source: Longwoods International

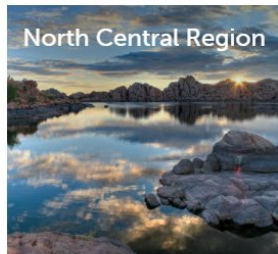
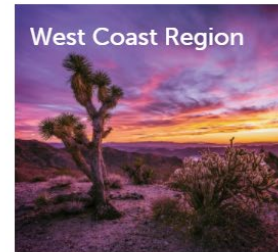


# 2020 Visitor profile

## 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.

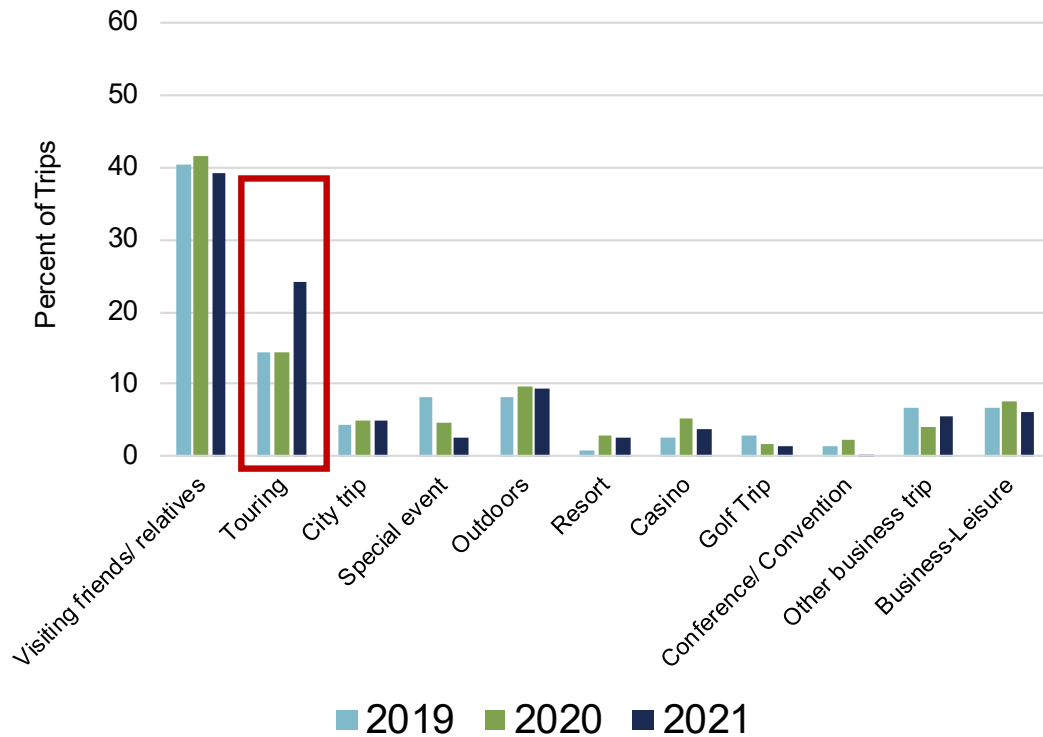
Overnight Visitation	Visitor Spending
<b>32.1 million</b>	<b>\$15 billion</b>
<small>Total Overnight Visitation, 2020</small>	<small>Direct Travel Spending, 2020</small>
Taxes	Jobs
<b>\$2.7 billion</b>	<b>160.5 thousand</b>
<small>Total Tax Revenue, 2020</small>	<small>Total Generated Employment, 2020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



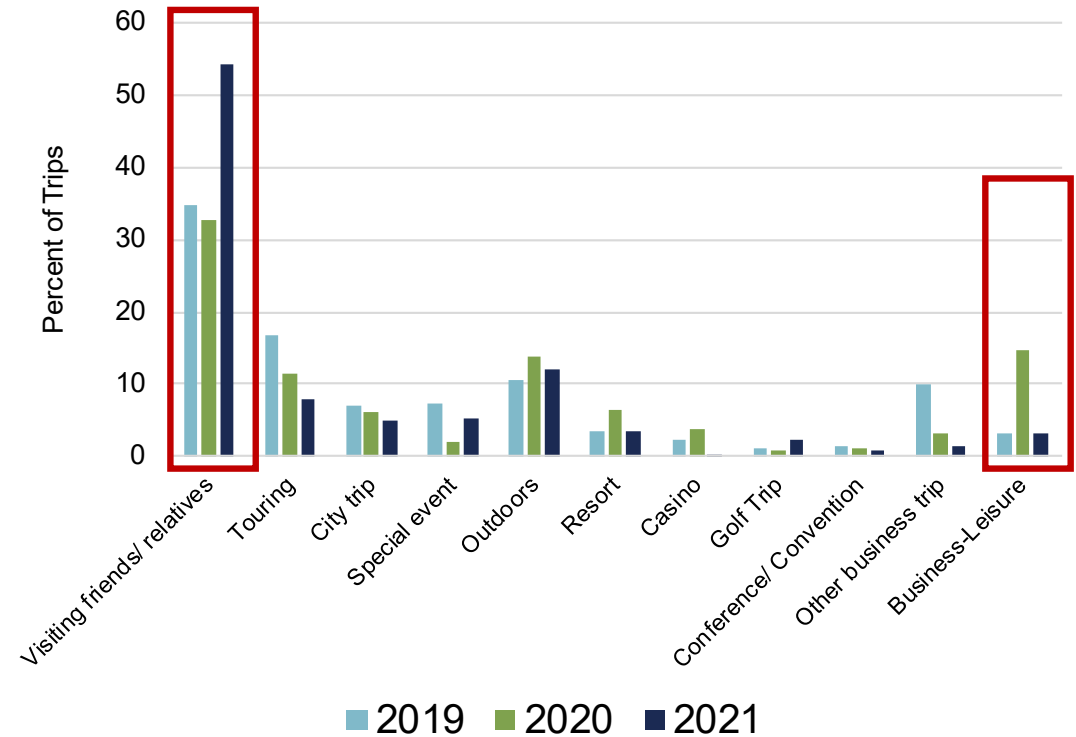
# Main Purpose of Trip

## Tucson & Southern Region

### Q1 (January-March)

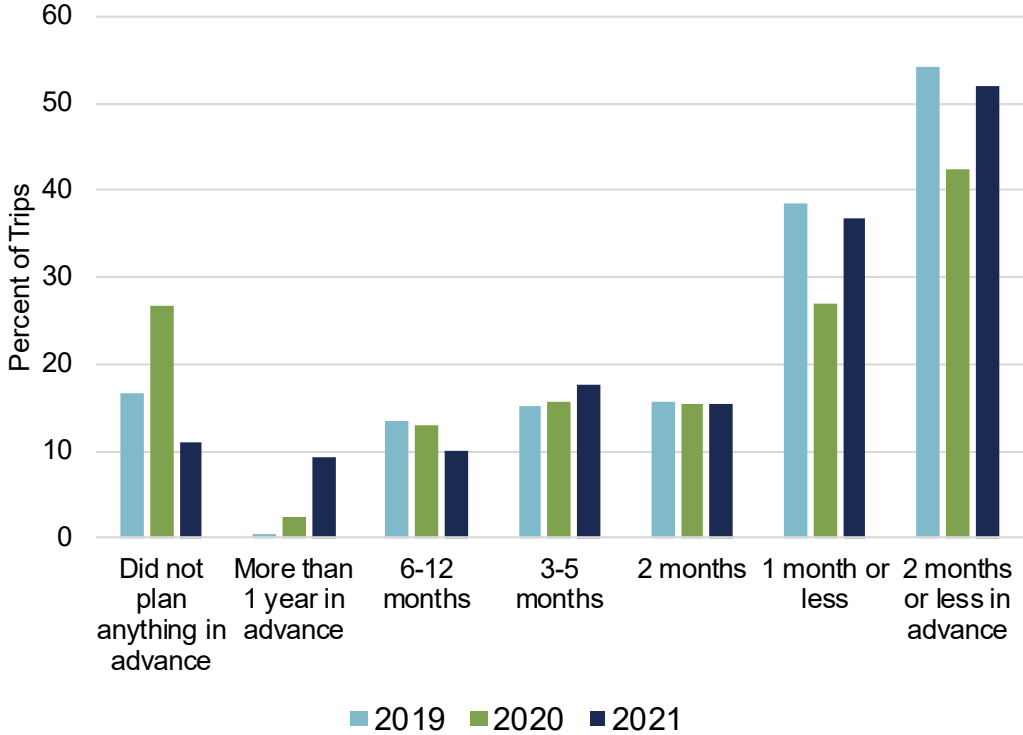


### Q2 (April-June)

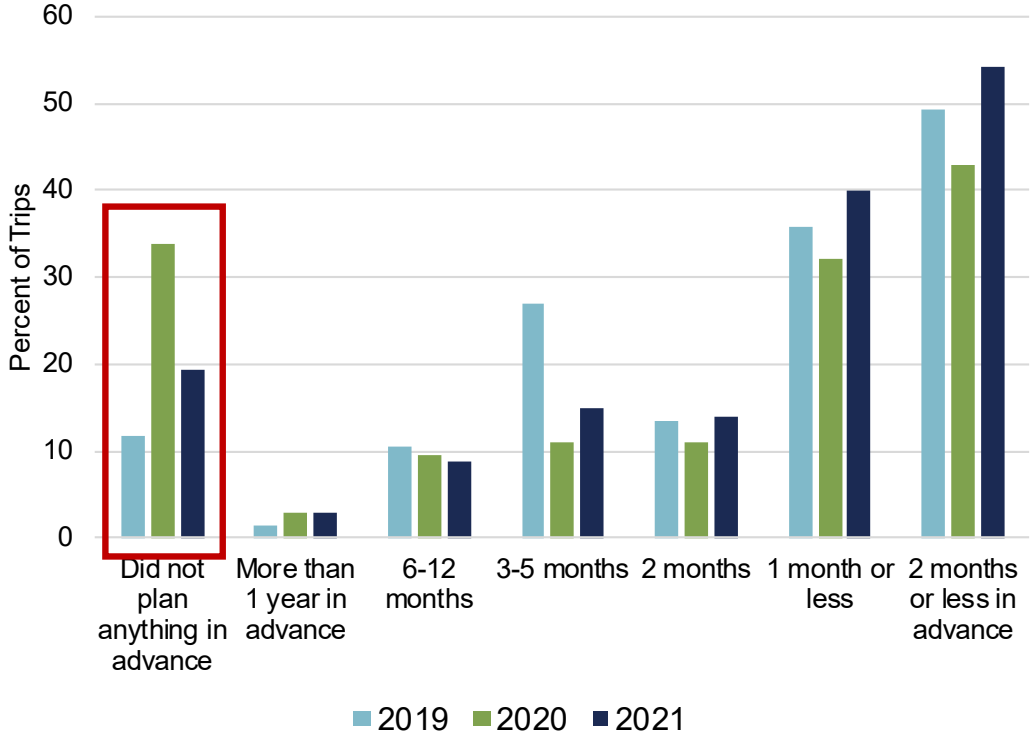


# Length of Trip Planning Tucson & Southern Region

### Q1 (January-March)



### Q2 (April-June)



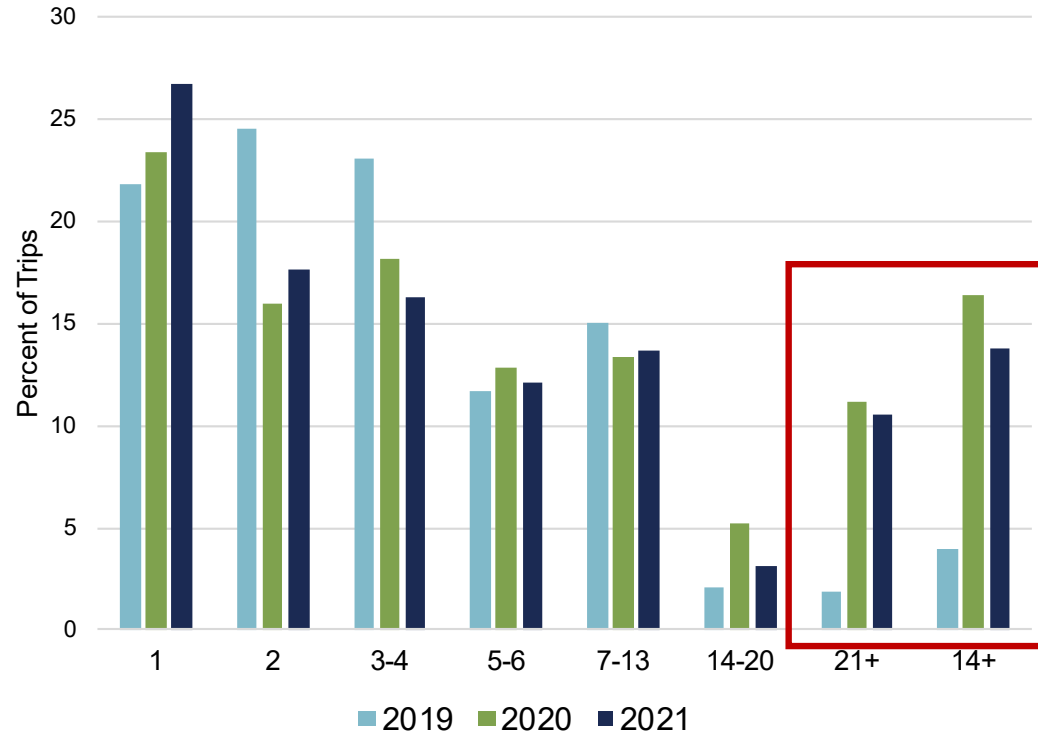
Source: Longwoods International



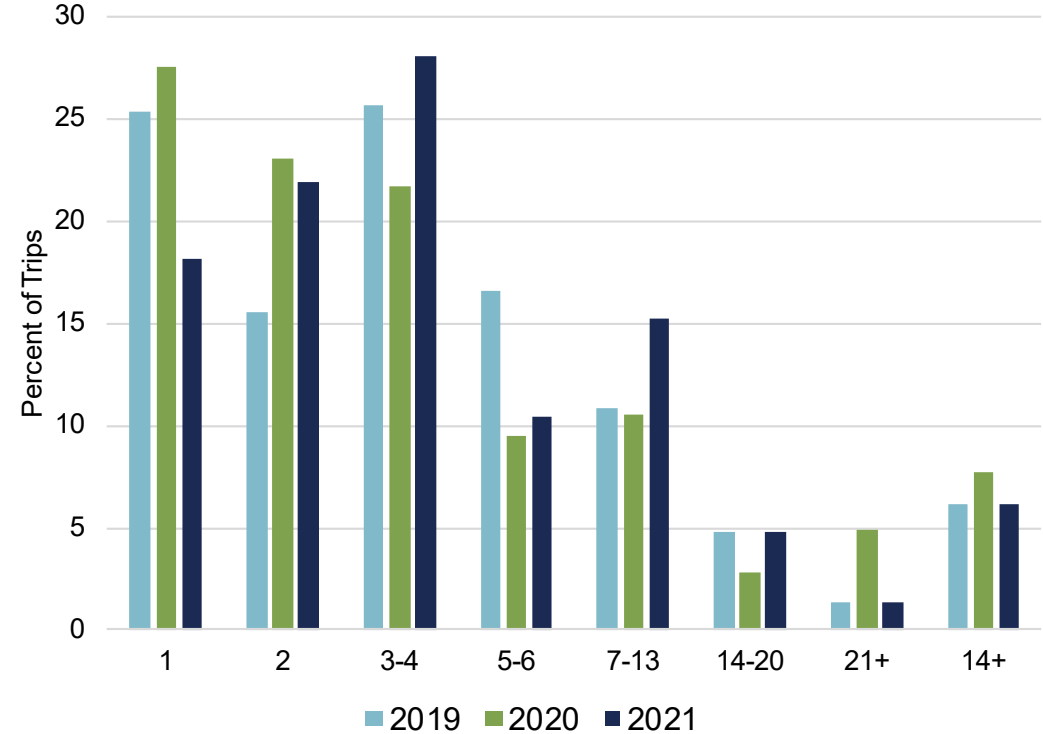
# Total Nights Away

## Tucson & Southern Region

### Q1 (January-March)



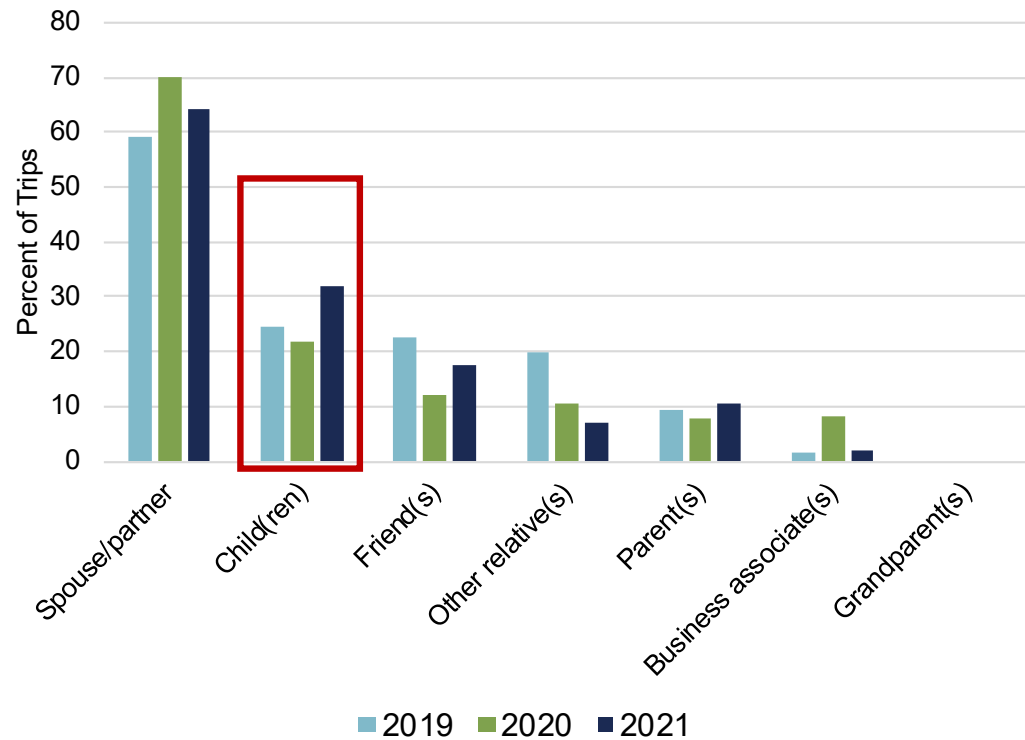
### Q2 (April-June)



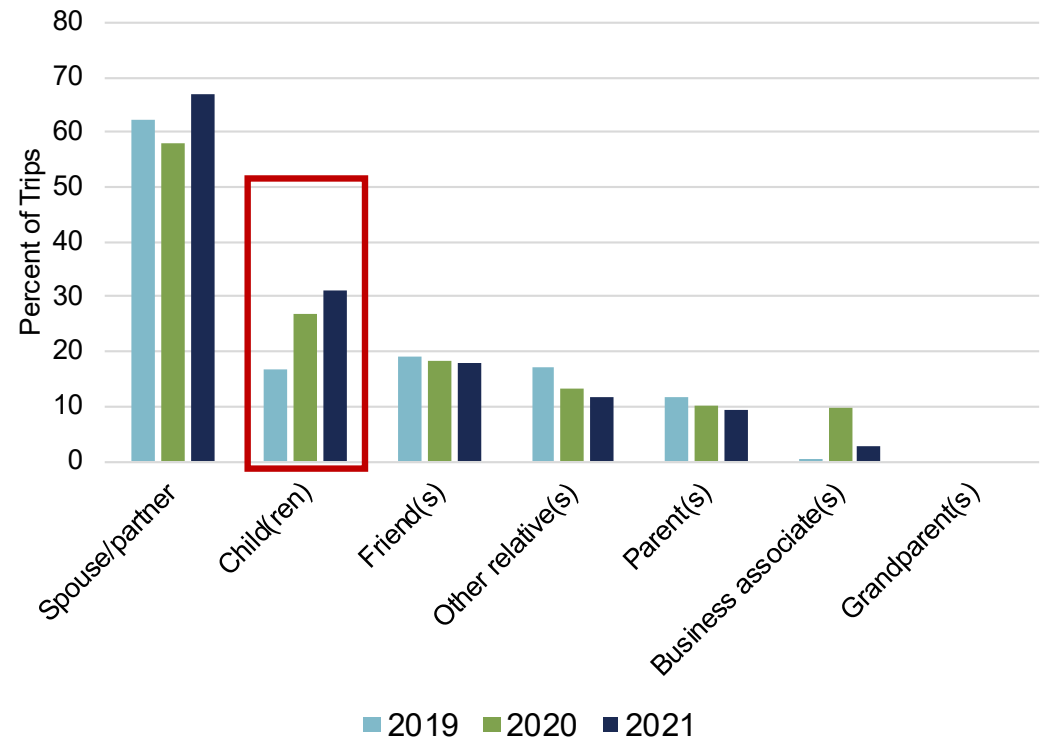
# Travel Party Composition

## Tucson & Southern Region

### Q1 (January-March)



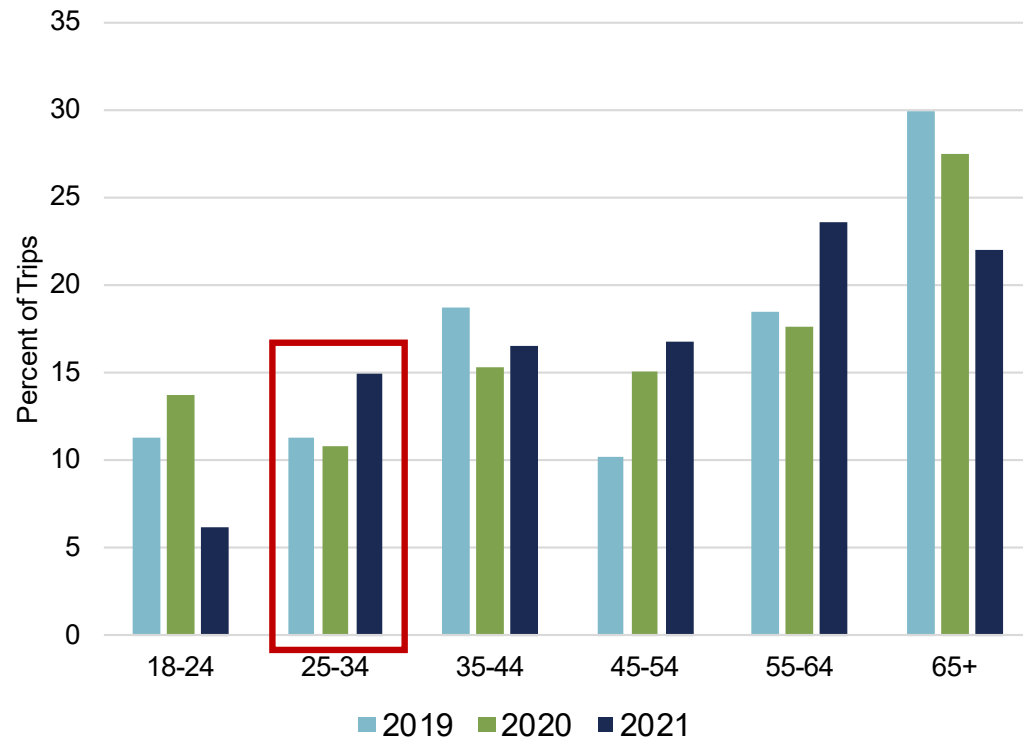
### Q2 (April-June)



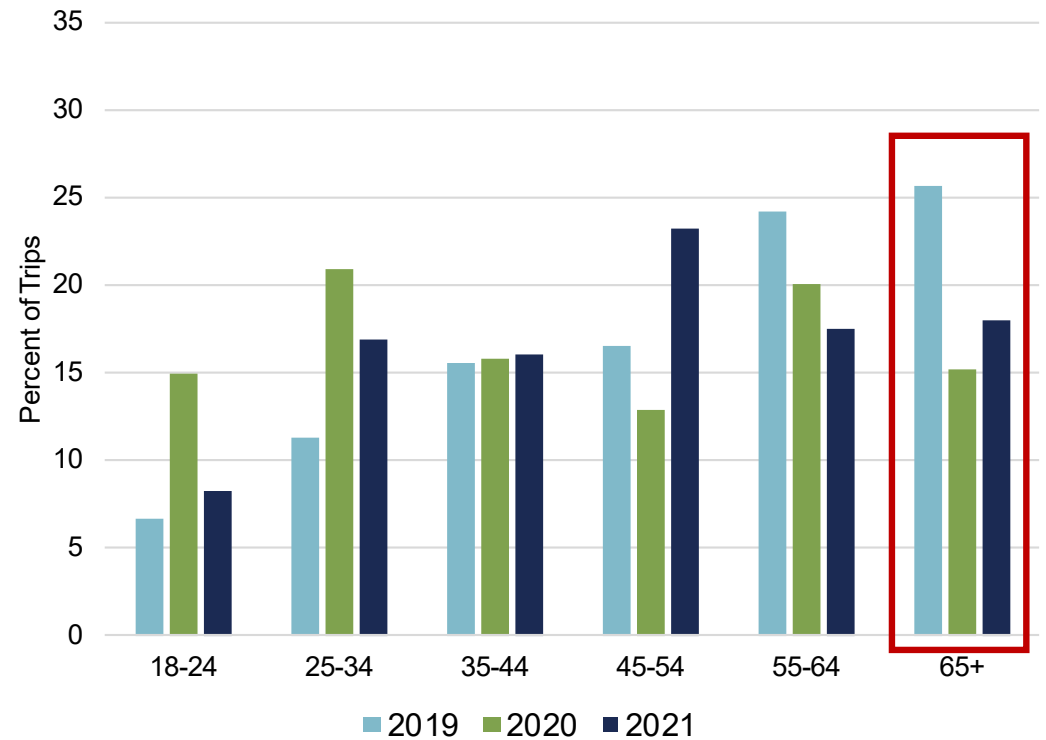
# Age

## Tucson & Southern Region

### Q1 (January-March)



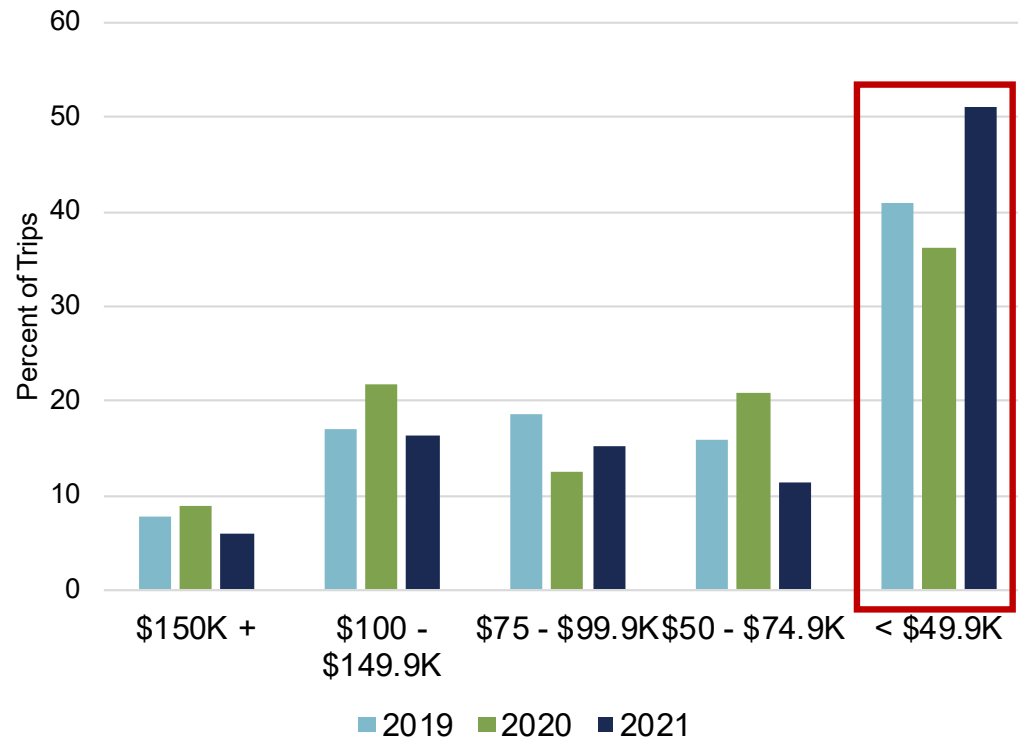
### Q2 (April-June)



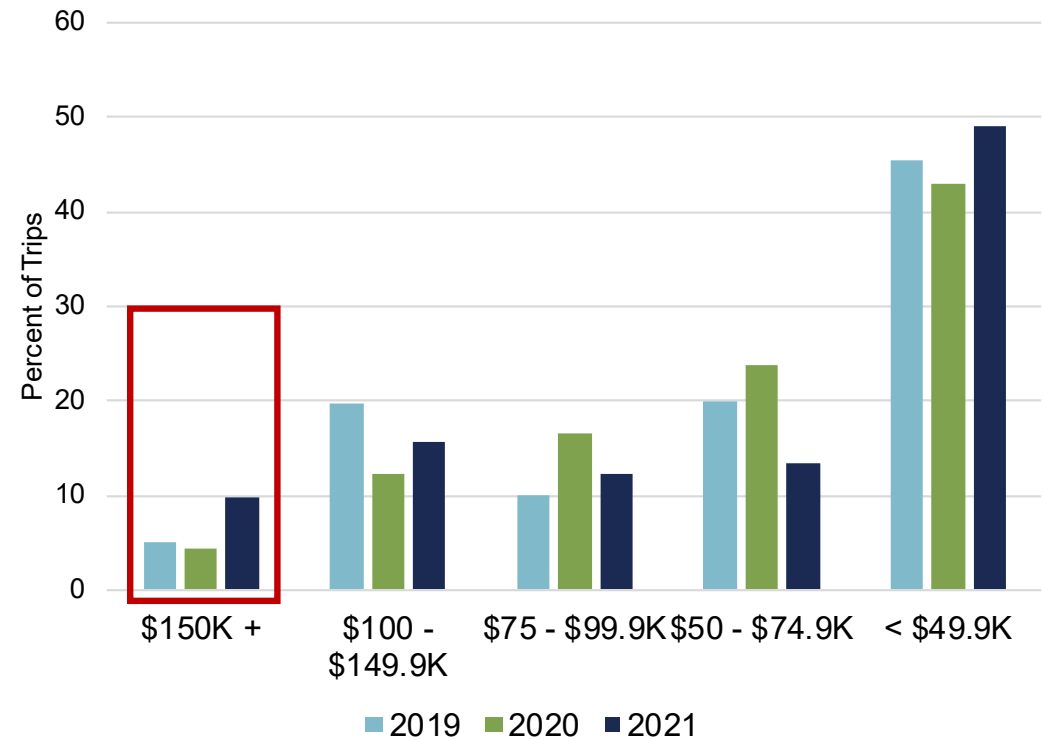
# Household Income

## Tucson & Southern Region

### Q1 (January-March)



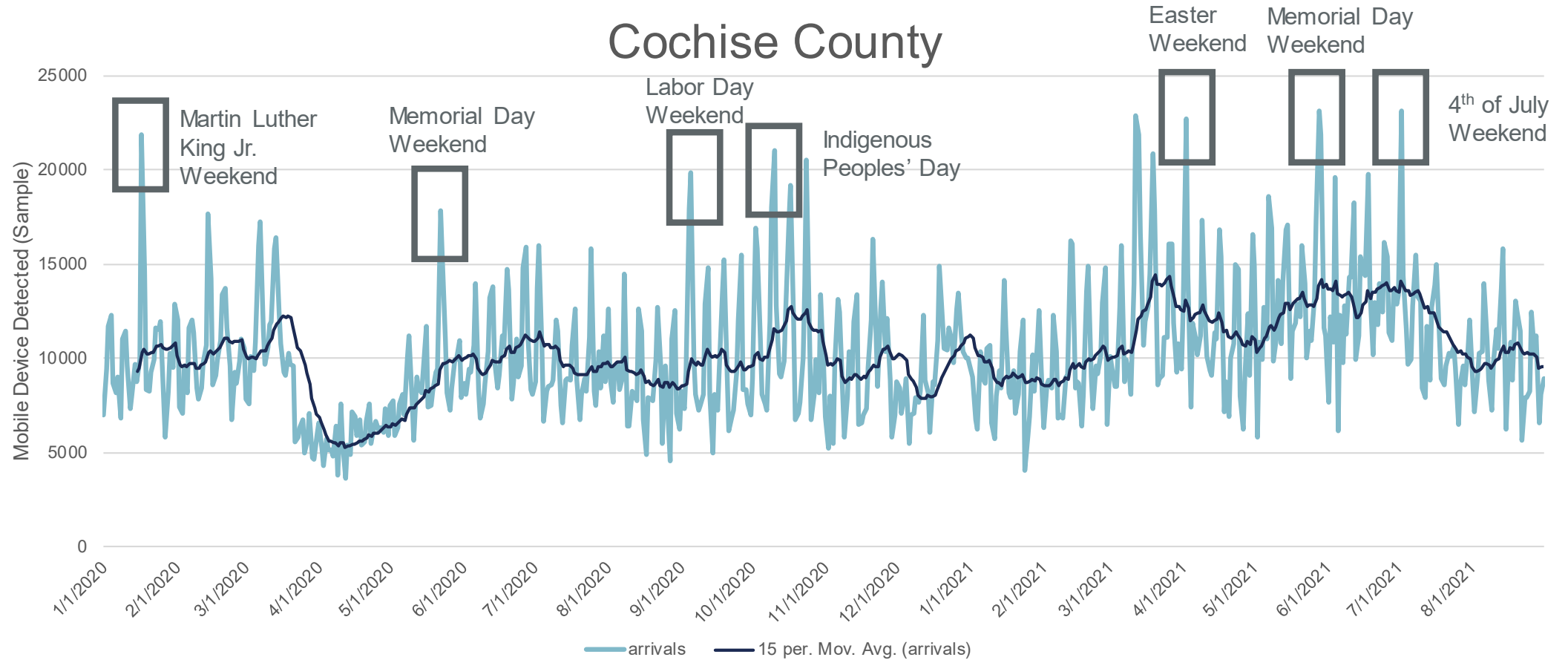
### Q2 (April-June)





# Cochise County

# Trips by Arrival County Over Time





# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Cochise County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Los Angeles	18.1%	26%	1 Day, 17 Hours, 18 Minutes
Phoenix	15.6%	29%	1 Day, 10 Hours, 35 Minutes
Tucson/Sierra Vista	8.4%	48%	1 Day, 11 Hours, 26 Minutes
El Paso	4.4%	34%	2 Days, 3 Hours, 6 Minutes
Albuquerque/Santa Fe	4.3%	25%	1 Day, 15 Hours, 14 Minutes
Salt Lake City	2.9%	24%	2 Days, 23 Hours, 56 Minutes
San Diego	2.1%	23%	2 Days, 7 Hours, 15 Minutes
Sacramento/Stockton/Modesto	1.8%	22%	2 Days, 5 Hours, 11 Minutes
Dallas/Fort Worth	1.8%	21%	2 Days, 3 Hours, 28 Minutes
San Francisco/Oakland/San Jose	1.7%	6%	2 Days, 4 Hours, 33 Minutes

Source: Arrivalist

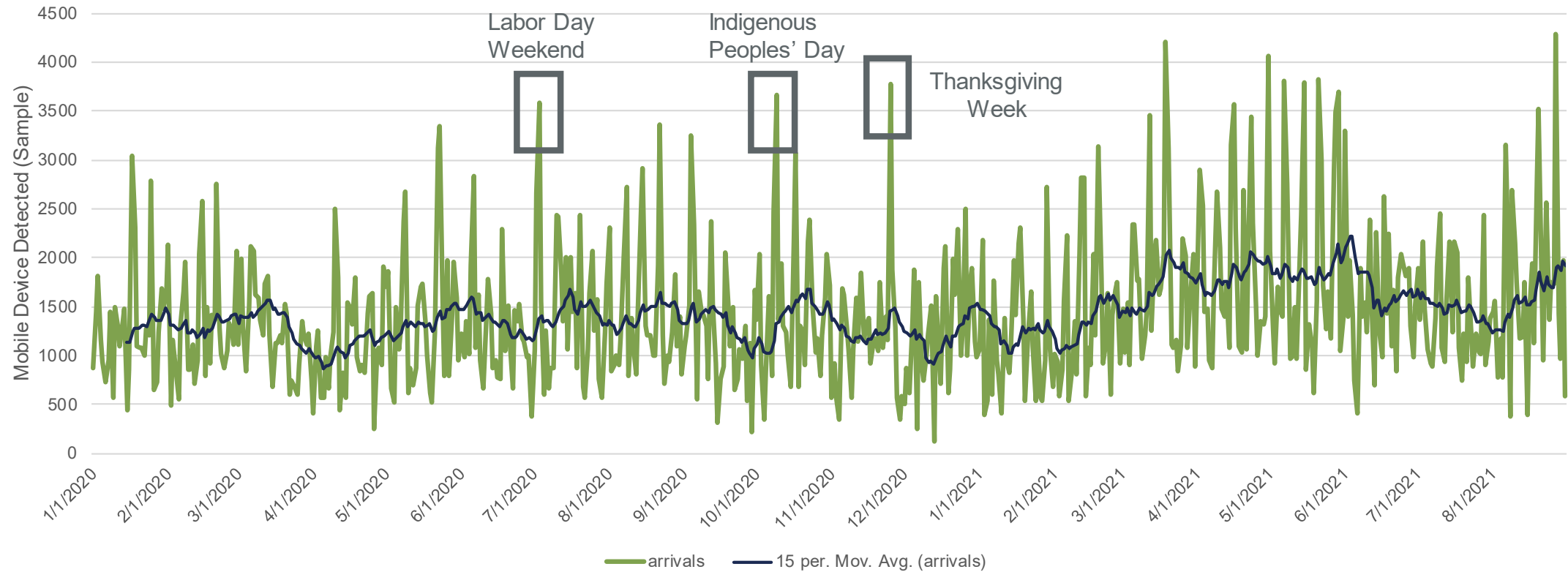


# Graham County



# Trips by Arrival County Over Time

## Graham County





# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Graham County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	14.2%	15%	1 Day, 22 Hours, 46 Minutes
Los Angeles	12.4%	28%	1 Day, 3 Hours, 4 Minutes
Tucson/Sierra Vista	11.4%	19%	2 Days, 2 Hours, 48 Minutes
Reno	5.7%	14%	3 Days, 1 Hour, 32 Minutes
Fresno/Visalia	3.6%	36%	1 Day, 1 Hour, 37 Minutes
Sacramento/Stockton/Modesto	3.1%	15%	1 Day, 18 Hours, 44 Minutes
Albuquerque/Santa Fe	2.5%	23%	2 Days, 16 Hours, 37 Minutes
Bakersfield	2.5%	39%	22 Hours, 21 Minutes
Salt Lake City	1.8%	8%	3 Days, 13 Minutes
Chicago	1.7%	7%	2 Days, 21 Hours, 37 Minutes

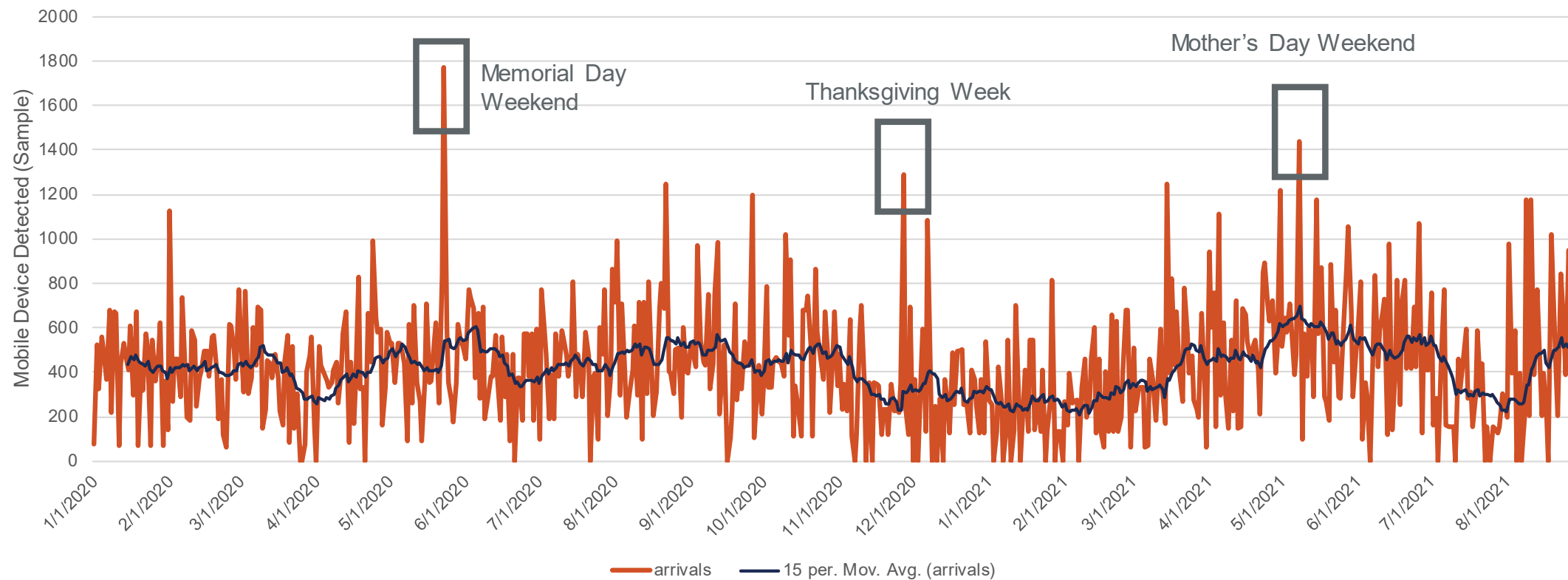
Source: Arrivalist



# Greenlee County

# Trips by Arrival County Over Time

## Greenlee County





# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Greenlee County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	23.8%	10%	1 Day, 6 Hours, 49 Minutes
Los Angeles	12.7%	15%	1 Day, 40 Minutes
Tucson/Sierra Vista	10.2%	13%	1 Day, 18 Hours, 57 Minutes
Seattle/Tacoma	2.6%	1%	3 Days, 1 Hour, 46 Minutes
Sacramento/Stockton/Modesto	2.1%	6%	21 Hours, 18 Minutes
Salt Lake City	1.9%	4%	3 Days, 4 Hours, 29 Minutes
Fresno/Visalia	1.7%	14%	1 Day, 6 Hours, 38 Minutes
New York	1.7%	0%	1 Day, 23 Hours, 27 Minutes
Portland-Or	1.6%	0%	3 Days, 3 Hours, 54 Minutes
Albuquerque/Santa Fe	1.5%	10%	2 Days, 1 Hour, 5 Minutes

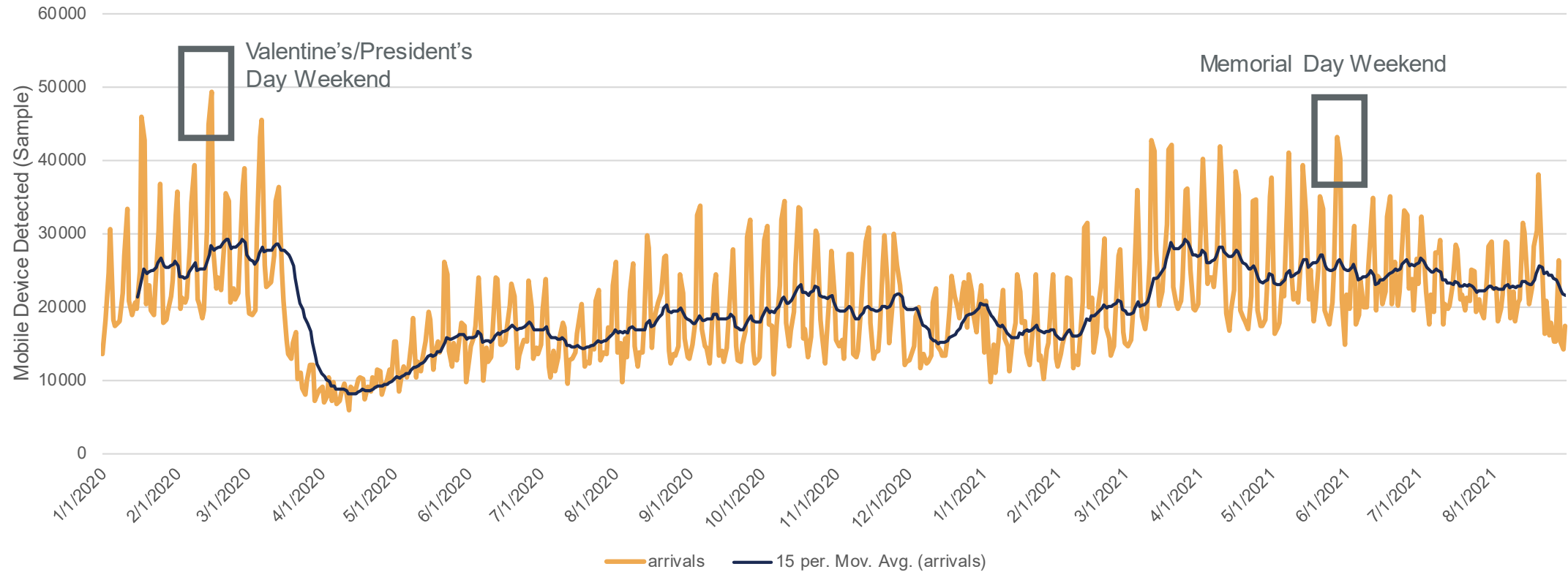
Source: Arrivalist



# Pima County

# Trips by Arrival County Over Time

## Pima County





# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Pima County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	20.6%	25%	1 Day, 10 Hours, 8 Minutes
Los Angeles	10.3%	25%	2 Days, 1 Hour, 45 Minutes
Tucson/Sierra Vista	4.3%	31%	1 Day, 6 Hours, 56 Minutes
Denver	3.8%	12%	3 Days, 22 Hours, 23 Minutes
El Paso	3.1%	21%	2 Days, 6 Hours, 55 Minutes
San Francisco/Oakland/San Jose	2.9%	12%	2 Days, 22 Hours, 36 Minutes
Sacramento/Stockton/Modesto	2.5%	24%	2 Days, 14 Hours, 25 Minutes
Seattle/Tacoma	2.4%	10%	4 Days, 8 Hours, 1 Minute
Chicago	2.3%	10%	3 Days, 20 Hours, 50 Minutes
Dallas/Fort Worth	2.3%	16%	2 Days, 20 Hours, 11 Minutes

Source: Arrivalist

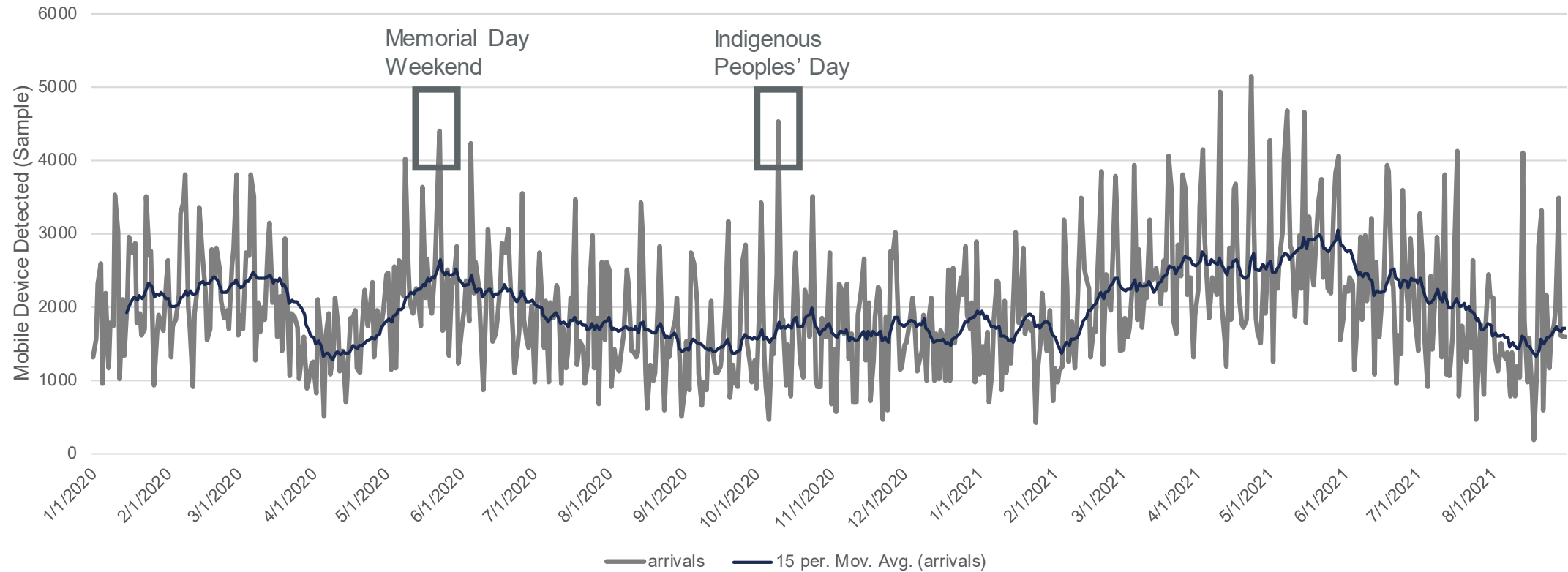




# Santa Cruz County

# Trips by Arrival County Over Time

## Santa Cruz County





# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Santa Cruz County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Phoenix	18.7%	23%	2 Days, 3 Hours, 26 Minutes
Los Angeles	10.6%	29%	1 Day, 17 Hours, 22 Minutes
Tucson/Sierra Vista	6.7%	25%	1 Day, 14 Hours, 10 Minutes
Reno	5.7%	18%	2 Days, 23 Hours, 2 Minutes
El Paso	3.5%	36%	1 Day, 21 Hours, 14 Minutes
Portland-Or	3.1%	5%	3 Days, 13 Hours, 39 Minutes
Sacramento/Stockton/Modesto	2.9%	11%	2 Days, 8 Hours, 31 Minutes
Albuquerque/Santa Fe	2.6%	20%	2 Days, 6 Hours, 15 Minutes
Seattle/Tacoma	2.3%	5%	3 Days, 18 Hours, 23 Minutes
Salt Lake City	2.2%	29%	2 Days, 16 Hours, 54 Minutes

Source: Arrivalist



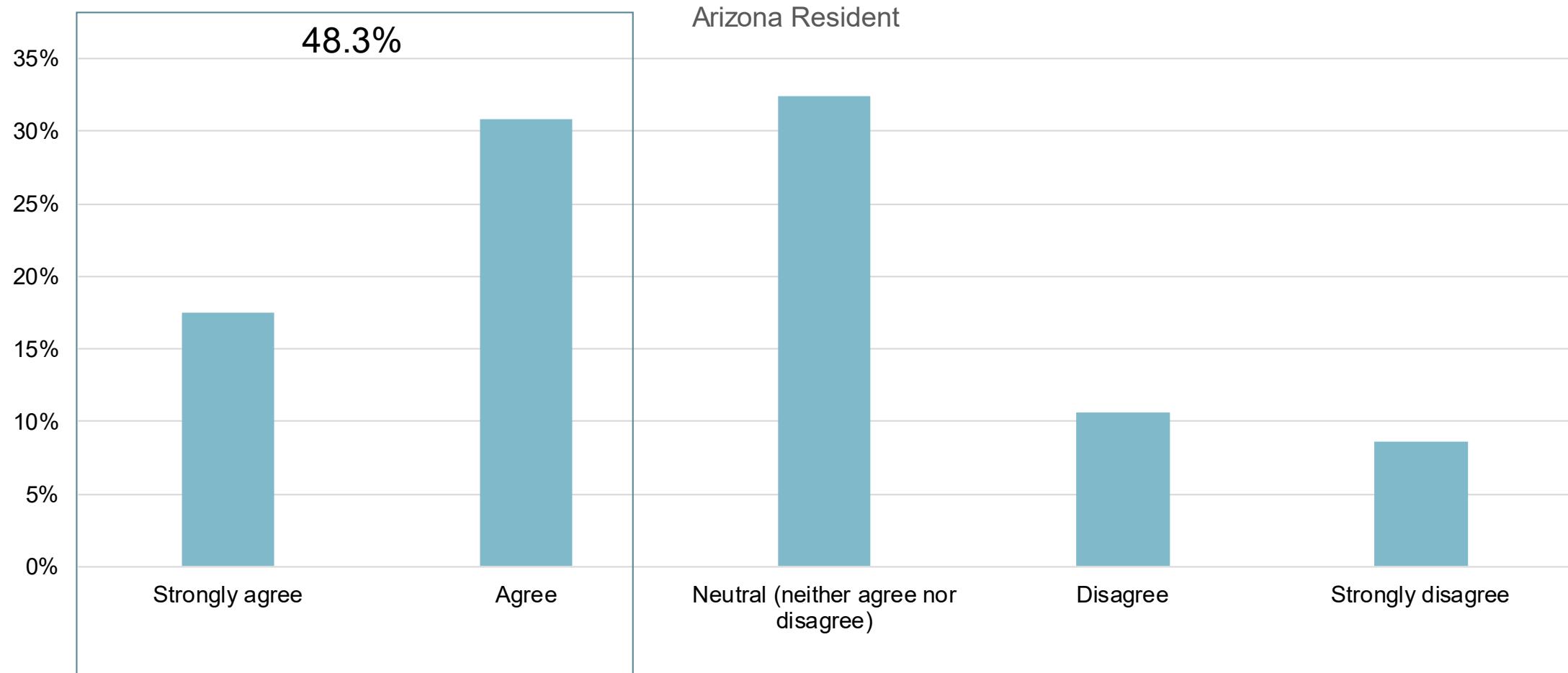
# Resident & Traveler Sentiment



# 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.



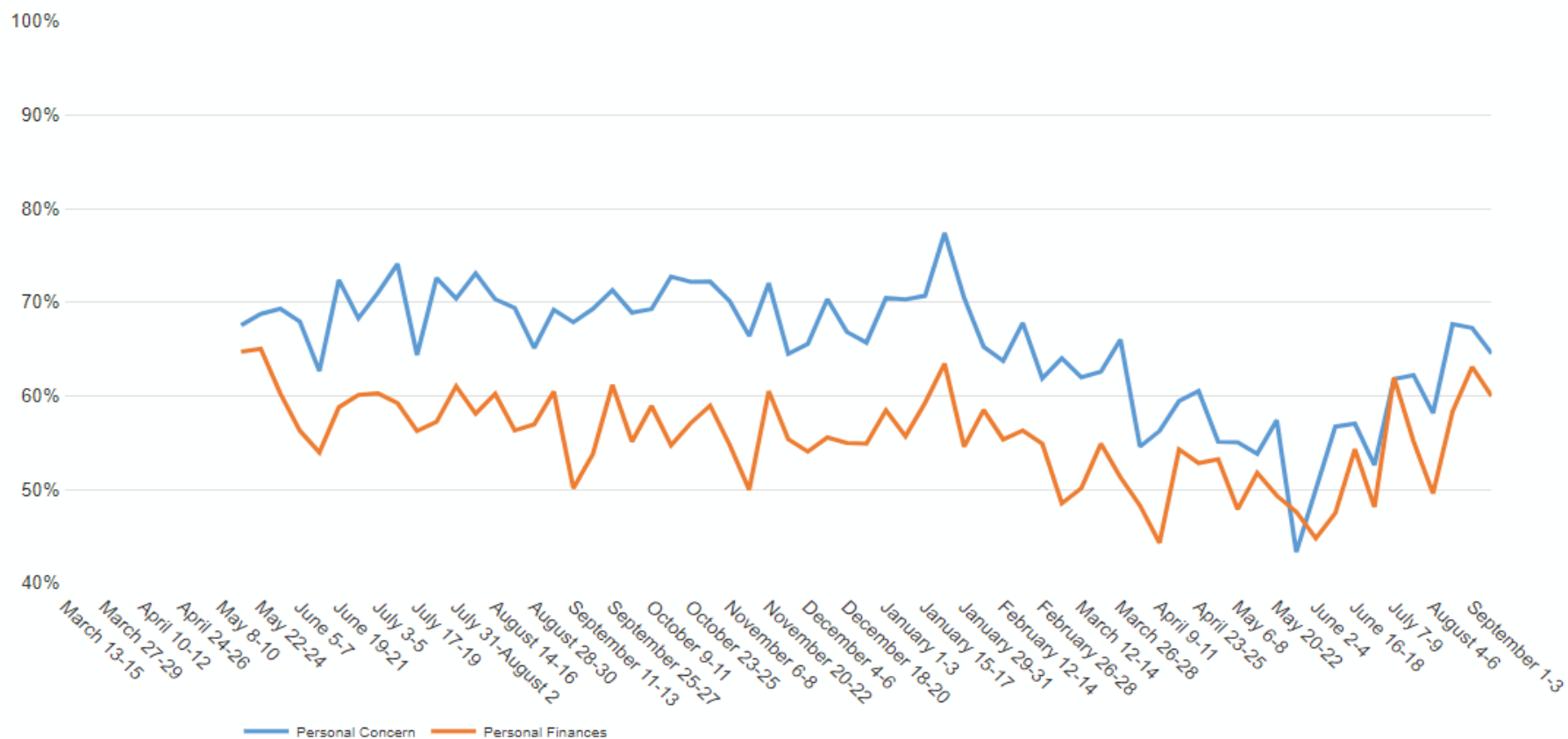


# Arizona-Oriented Travelers

- 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...

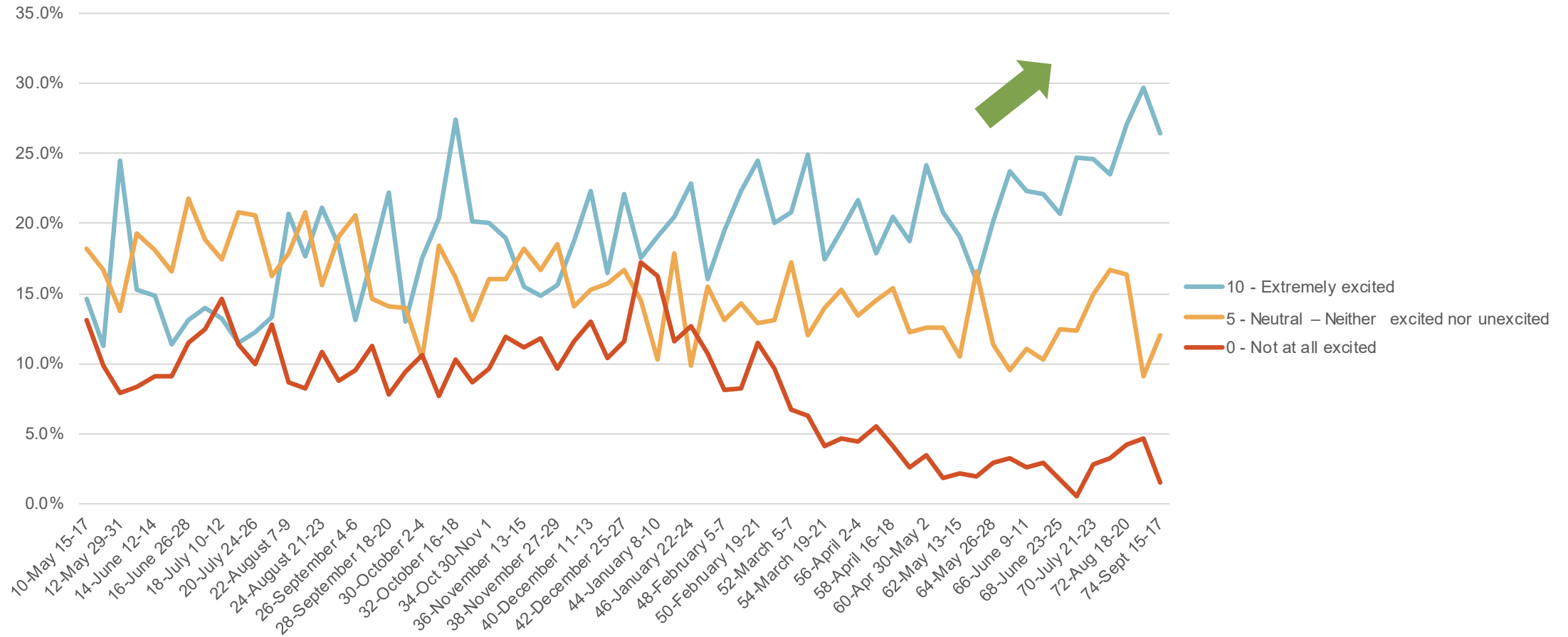
## Concern - Time Series



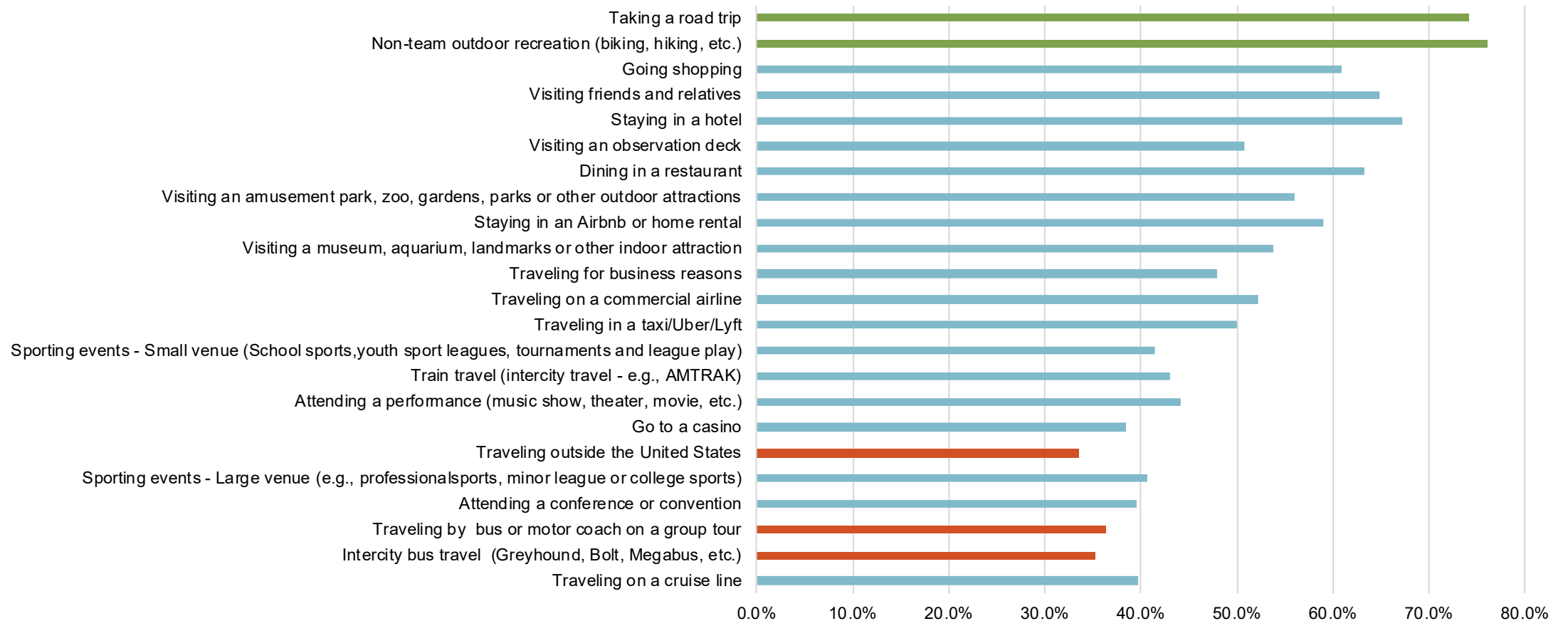
Source: Destination Analysts



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?



# 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



# Resources

- [www.tourism.az.gov](http://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 Team:

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- Kari Roberg, [kroberg@tourism.az.gov](mailto:kroberg@tourism.az.gov)
- Lena Allen, [lallen@tourism.az.gov](mailto:lallen@tourism.az.gov)

Thank you!



Photo credit: Enrique Noriega