

#### Agenda

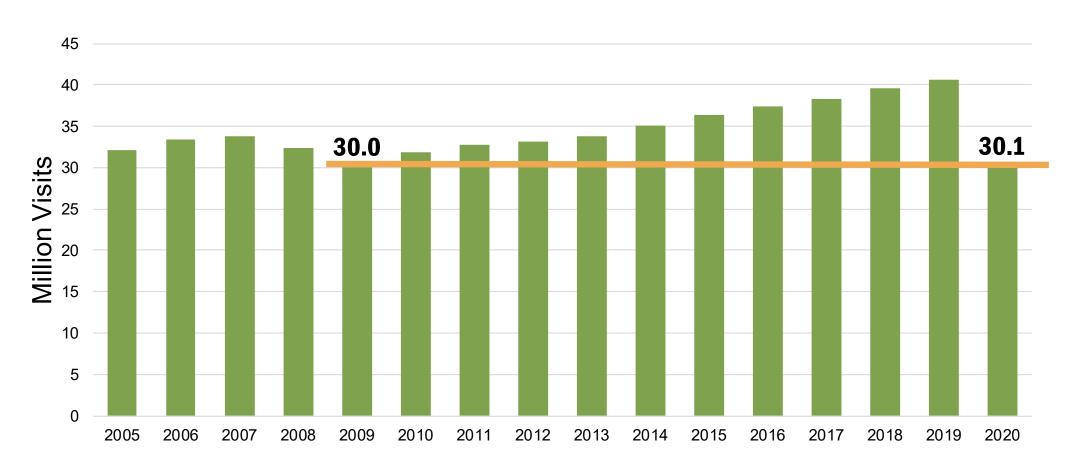
- Statewide Recap and 2021 so far
- Economic Impact of COVID on travel to the West Coast Region
- 2021 Regional Tourism Indicators
- 2021 Traveler Behaviors
  - Survey Data
  - Mobile Device Location Data
- Resident and Traveler Sentiment







# Domestic Overnight Visitation Arizona



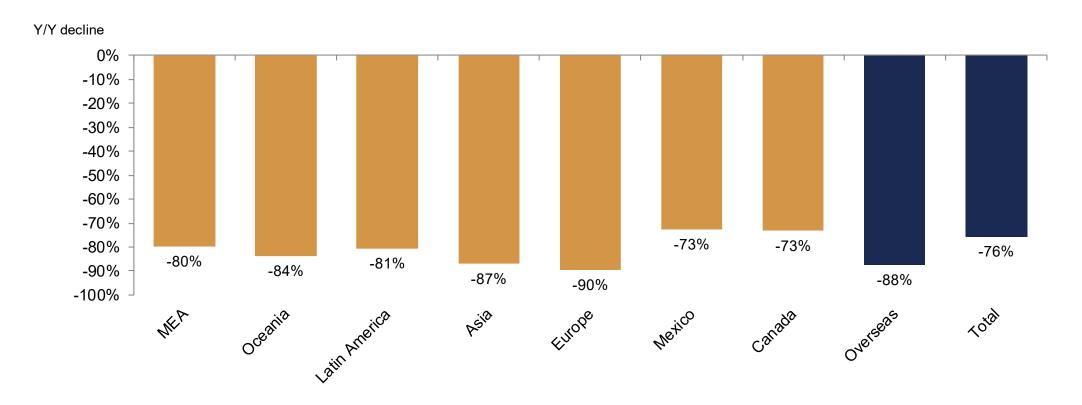




#### International Visitation to Arizona

YOY % Change (2020 v. 2019)

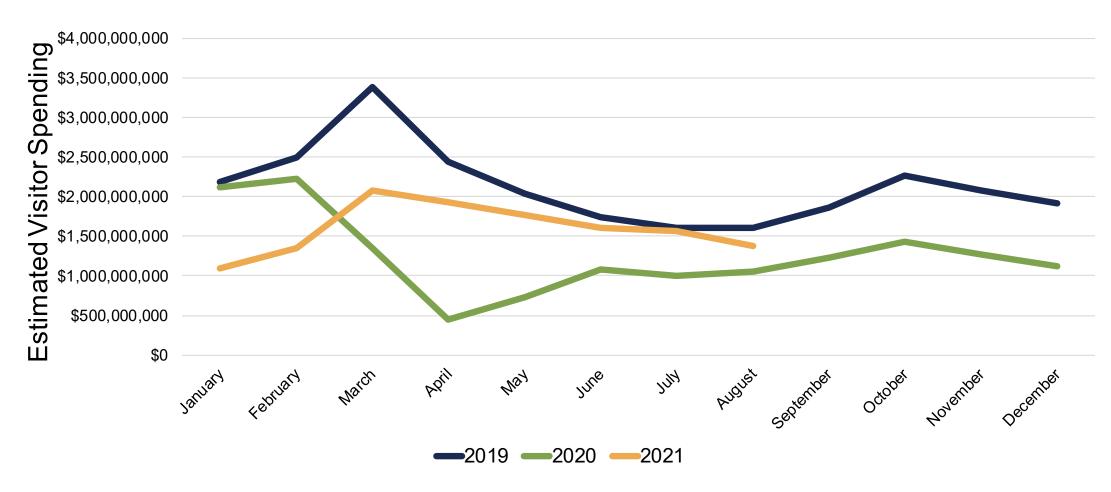
#### Declines in 2020 international visitation to Arizona





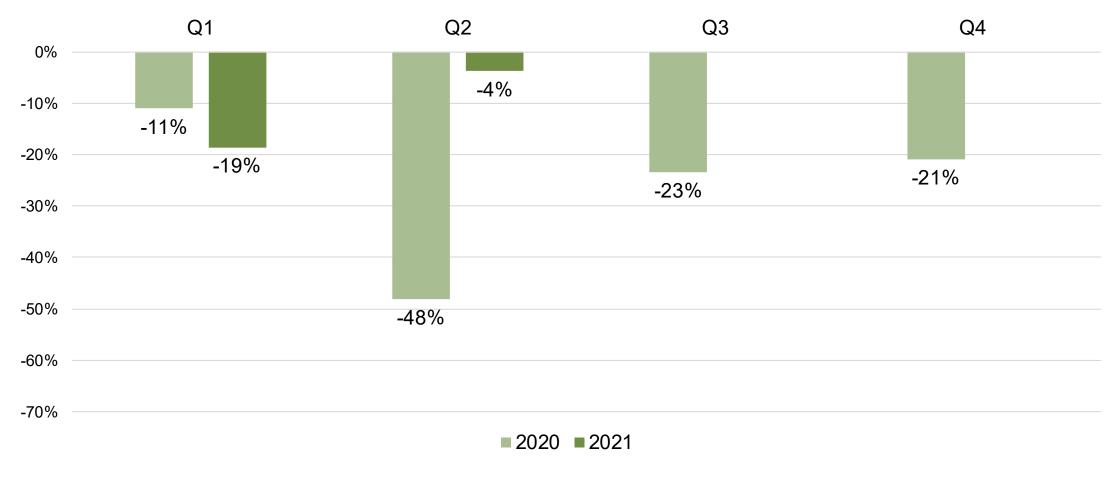


## Travel Spending Trend Arizona



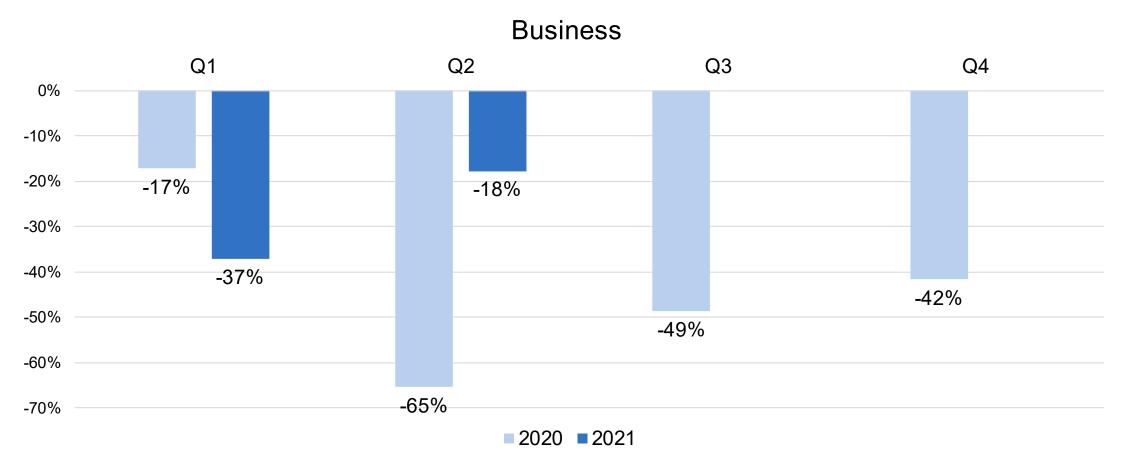








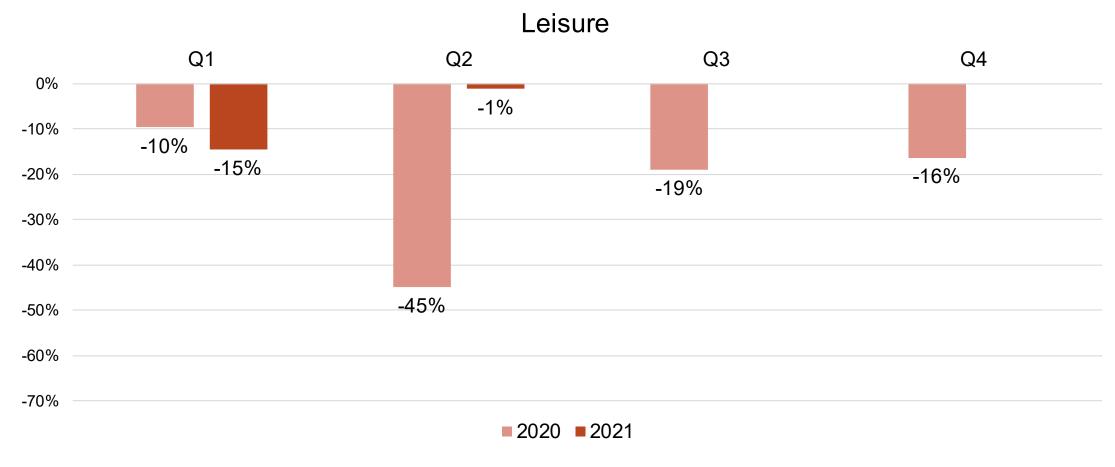






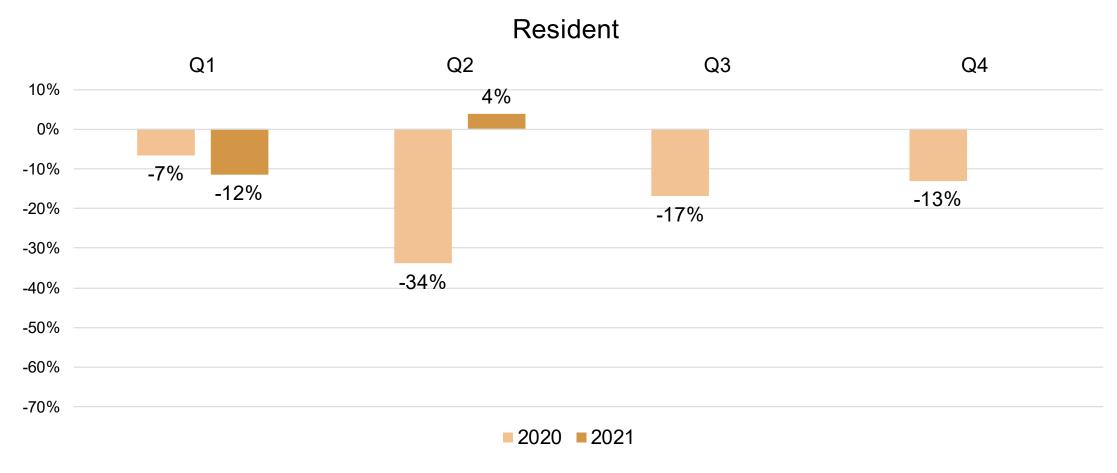


Source: Tourism Economics





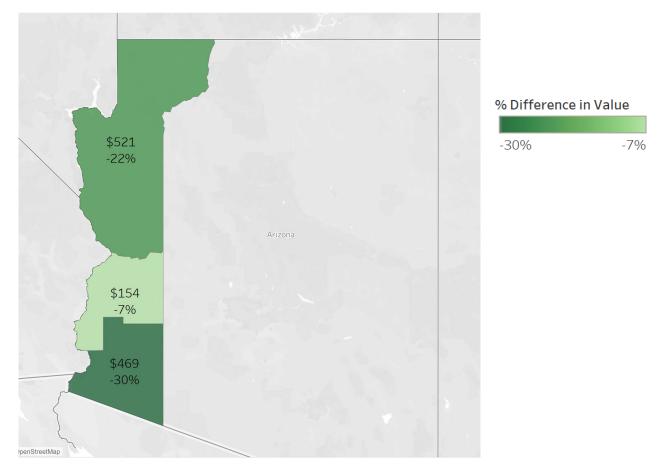








## 2020 Visitor Spending (\$ Millions and YOY % Change)







#### 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

#### **La Paz County**

**Direct Travel Spending** 

-\$12.4 Million

Accommodations Spending

+\$2.8 Million +16.3%

**Local Tax Receipts** 

-\$300,000 -4.4%

**Food Service Spending** 

-\$2.8 Million

**Employment\*** 

-80 jobs

Earnings\*

+\$1.0 Million +2.4%

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)

#### **Mohave County**

**Direct Travel Spending** 

-\$145.7 Million -21.8%

Accommodations Spending

+\$9.6 Million +9.5% **Local Tax Receipts** 

-\$3.2 Million

**Food Service Spending** 

-\$41.8 Million

**Employment\*** 

-820 jobs

Earnings\*

-\$9.2 Million -5.1%

\*Employment and Earnings include CARES Act support ARIZON



#### 2020 Travel Impacts

(YOY Difference and % Change compared to 2019)

#### **Yuma County**

**Direct Travel Spending** 

-\$198.1 Million

Accommodations Spending

-\$7.5 Million -8.9% **Local Tax Receipts** 

-\$6.1 Million -25.0%

**Food Service Spending** 

-\$41.4 Million

**Employment\*** 

-1,610 jobs

Earnings\*

-\$27.2 Million

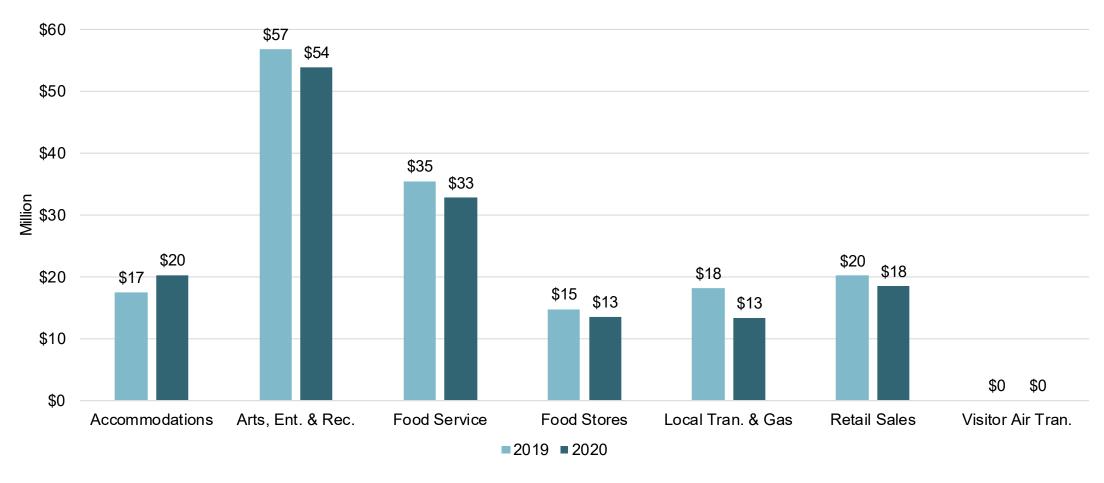
Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p

\*Employment and Earnings include CARES Act support





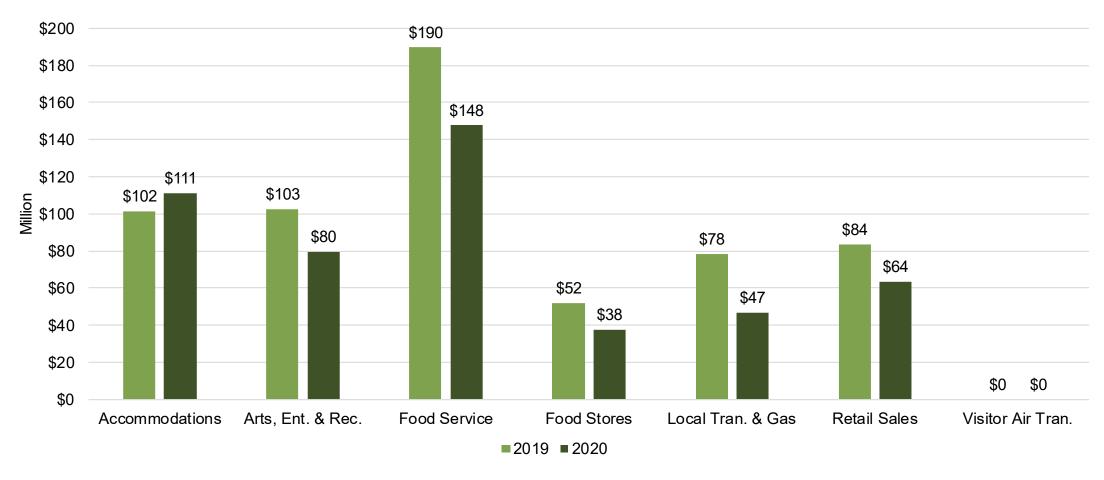
## Spending by Commodity Purchased La Paz County







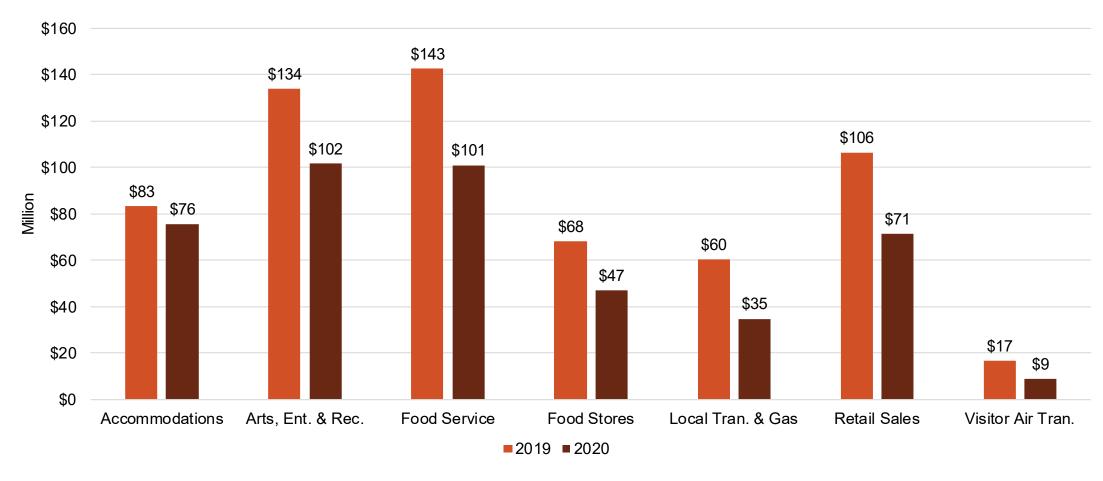
## Spending by Commodity Purchased Mohave County







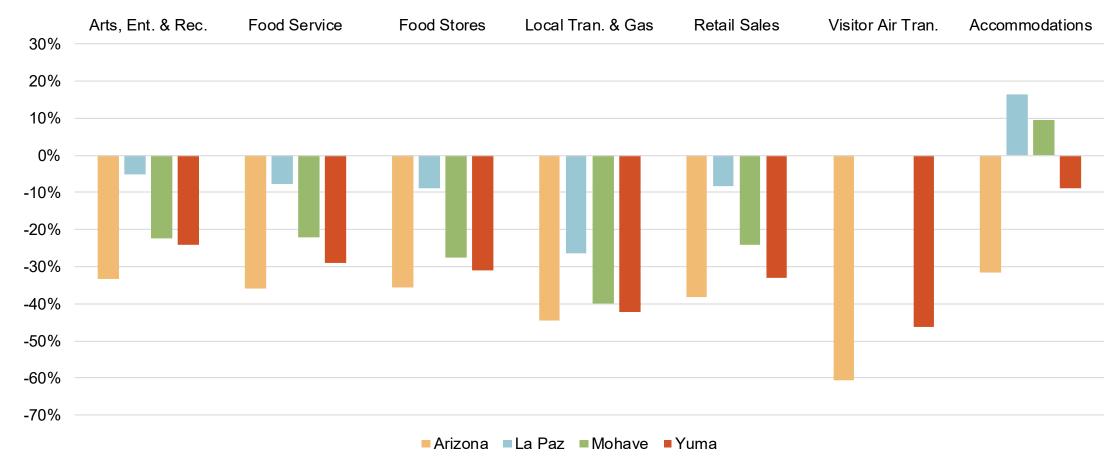
## Spending by Commodity Purchased Yuma County







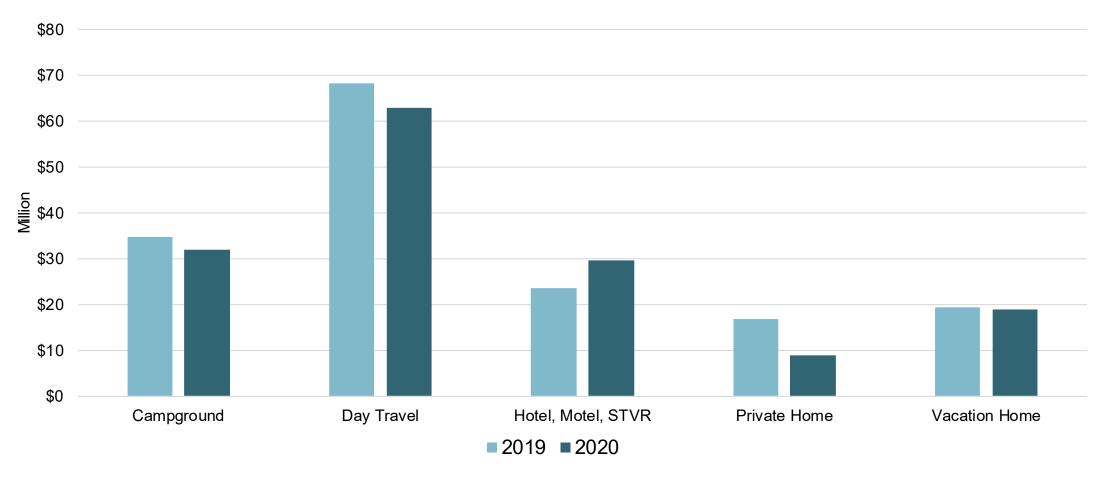
# Spending by Commodity Purchased % change







#### Spend by Accommodation Choice La Paz County



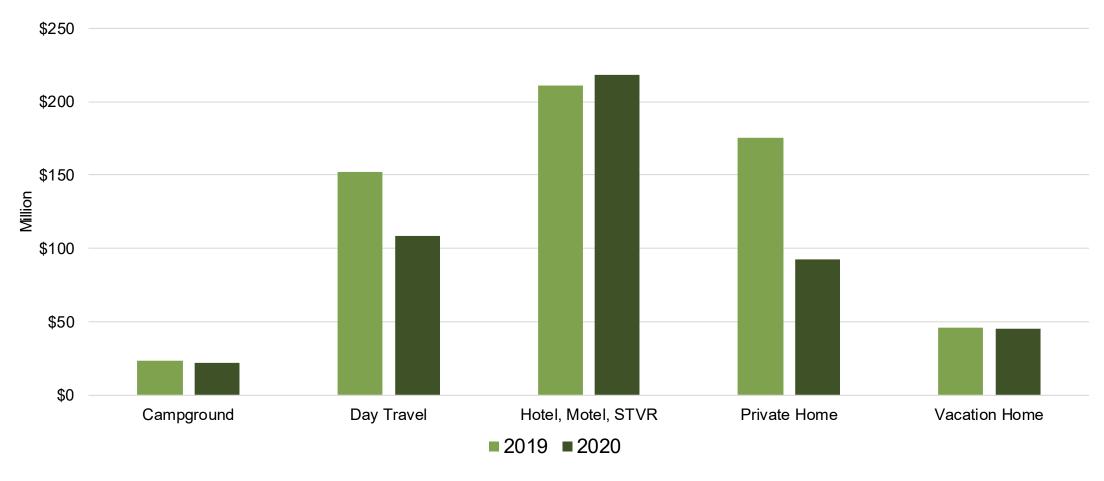
Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p

\*STVR stands for Short-Term Vacation Rental





#### Spend by Accommodation Choice Mohave County



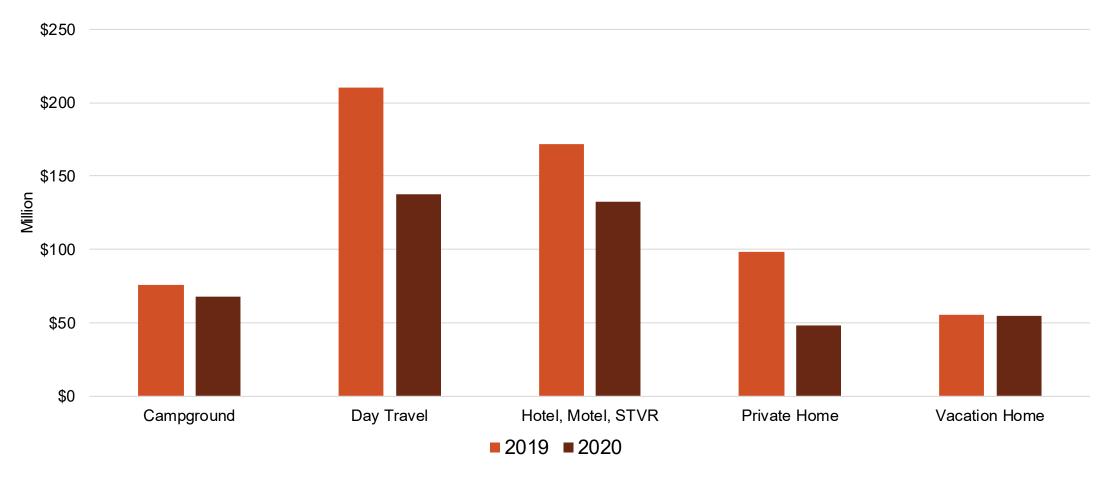
Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p

\*STVR stands for Short-Term Vacation Rental





### Spend by Accommodation Choice Yuma County



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

\*STVR stands for Short-Term Vacation Rental



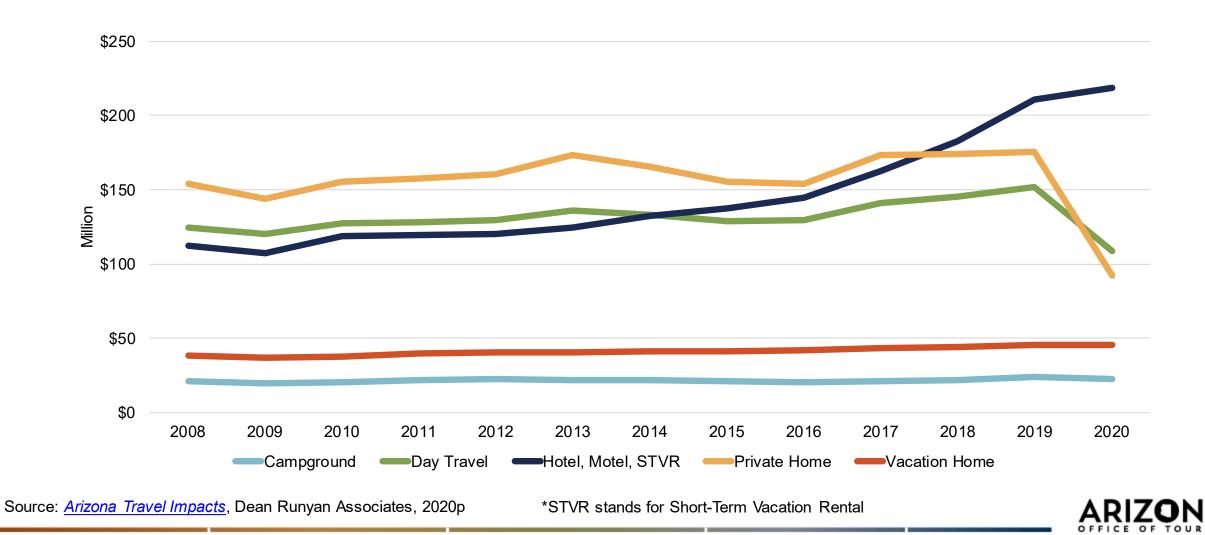


### Spend by Accommodation Choice Trend La Paz County



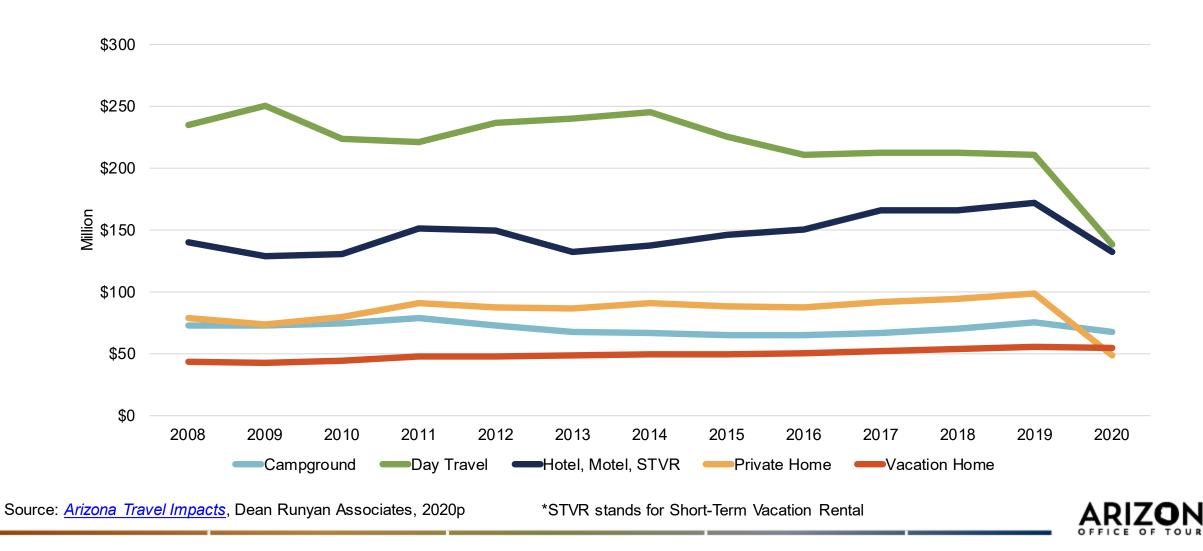


### Spend by Accommodation Choice Trend Mohave County





### Spend by Accommodation Choice Trend Yuma County





#### 2021 Tourism Indicators To-Date

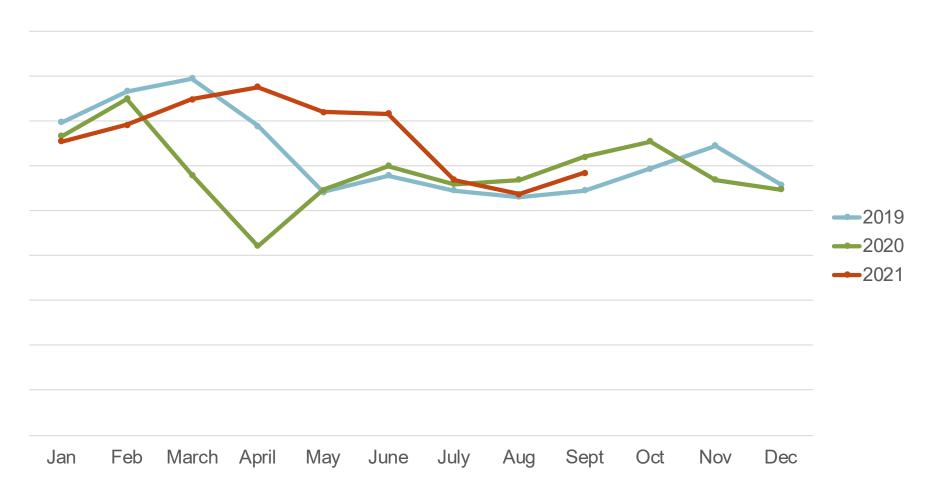
West Coast Region

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





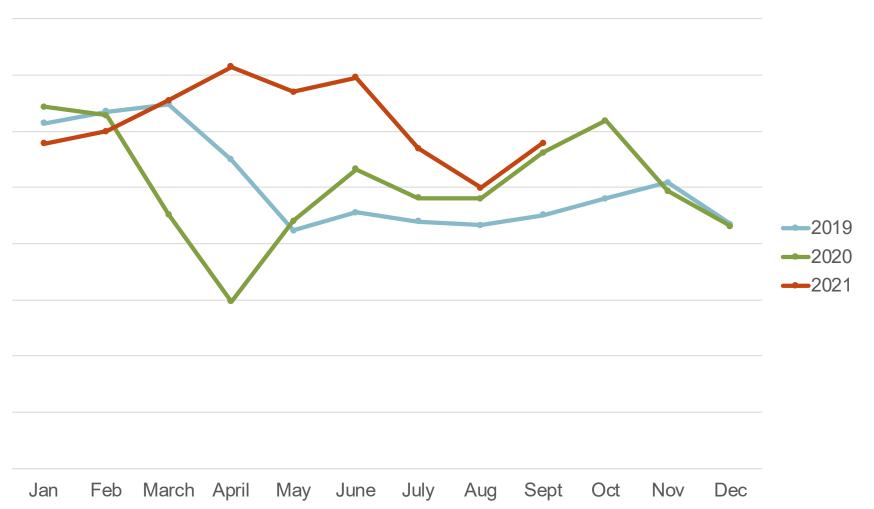
### Lodging Occupancy La Paz County







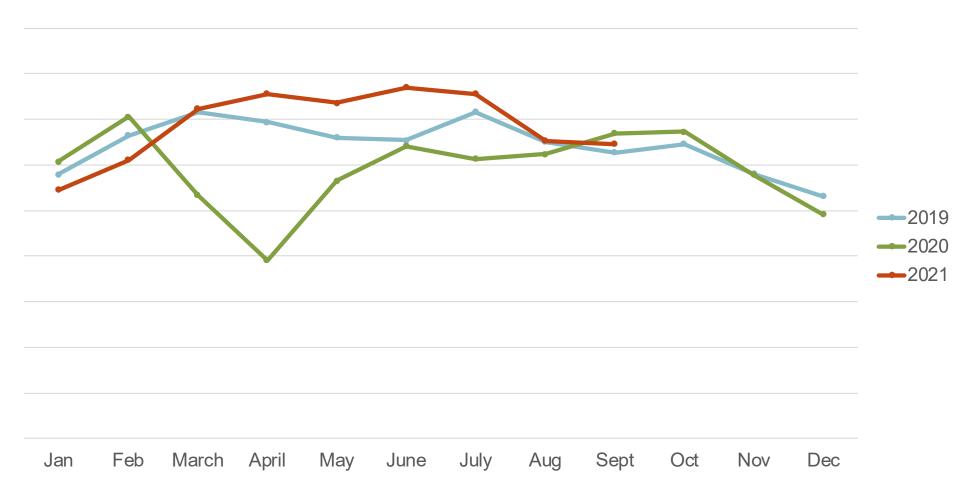
#### Lodging RevPAR La Paz County







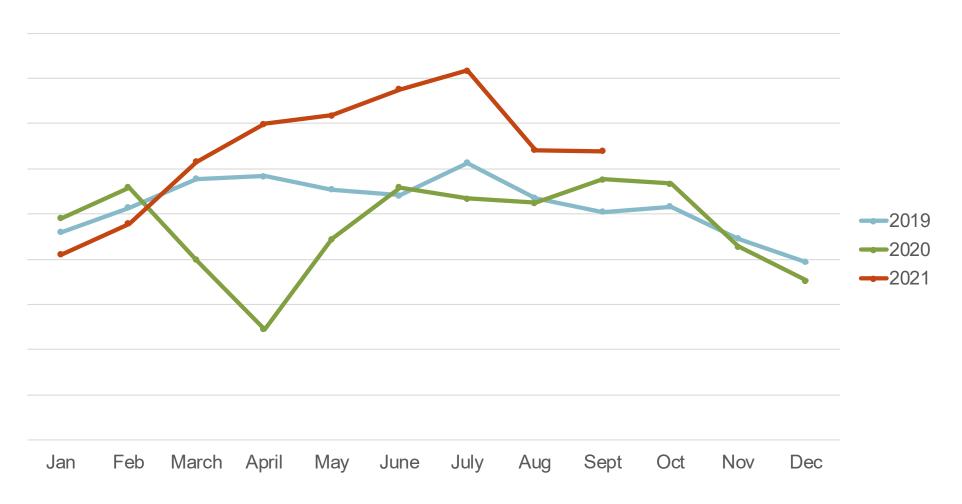
### Lodging Occupancy Mohave County







### Lodging RevPAR Mohave County







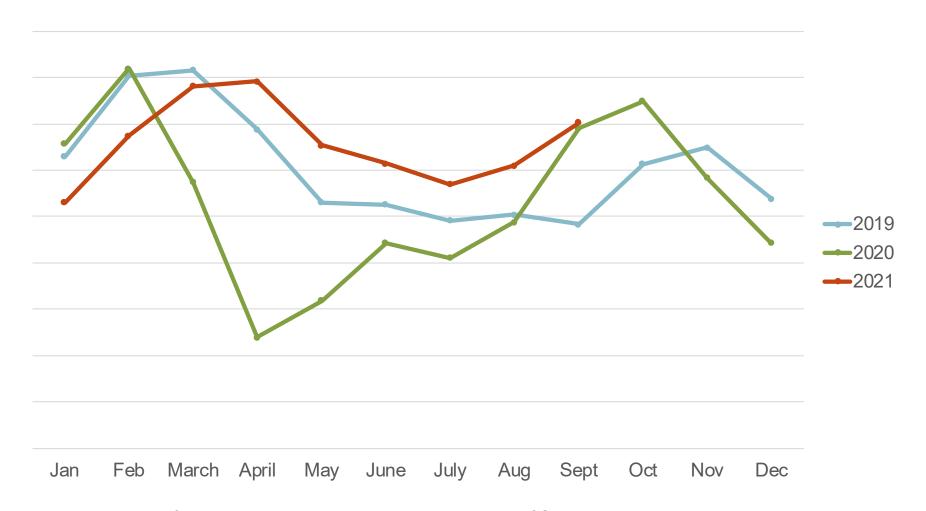
### Lodging Occupancy Yuma County







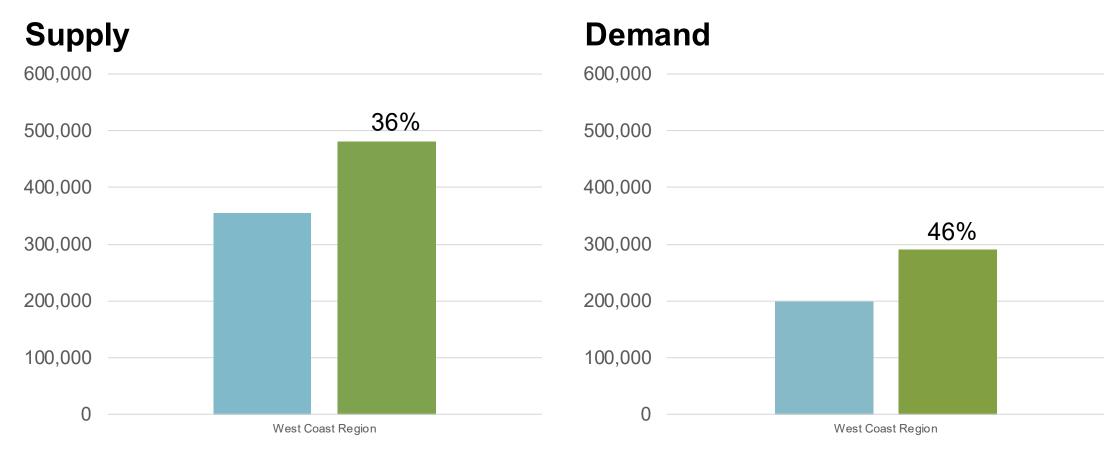
### Lodging RevPAR Yuma County







## Airbnb — West Coast Region YOY % Change

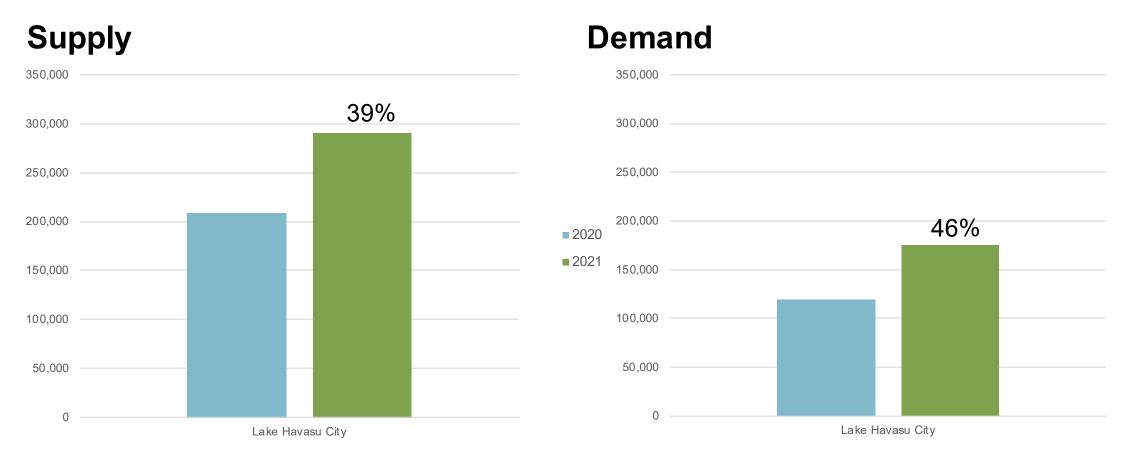


Source: AirDNA





## Airbnb — City Level YOY % Change



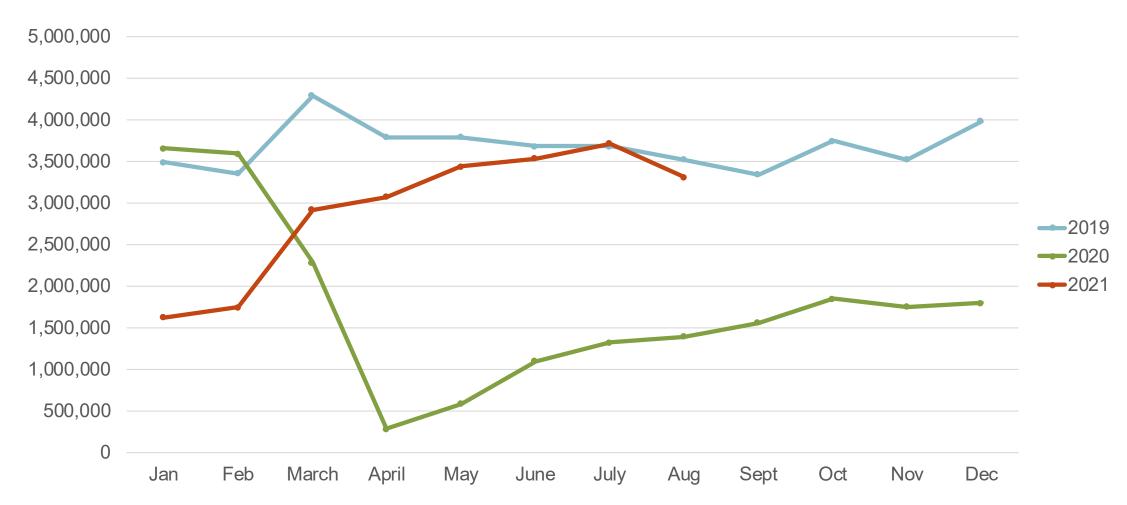
Source: AirDNA





#### Airport Passenger Traffic

Phoenix Sky Harbor - Domestic



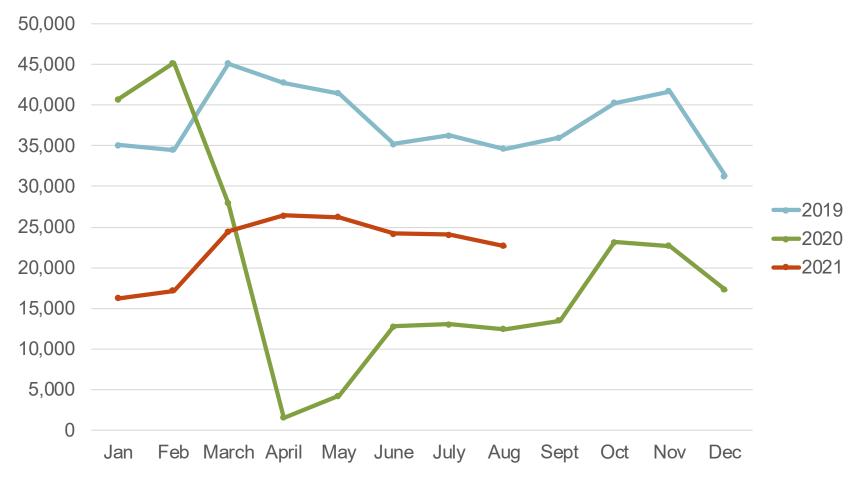
Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports





#### Airport Passenger Traffic

West Coast Region



Includes: Laughlin Bullhead International, Yuma International

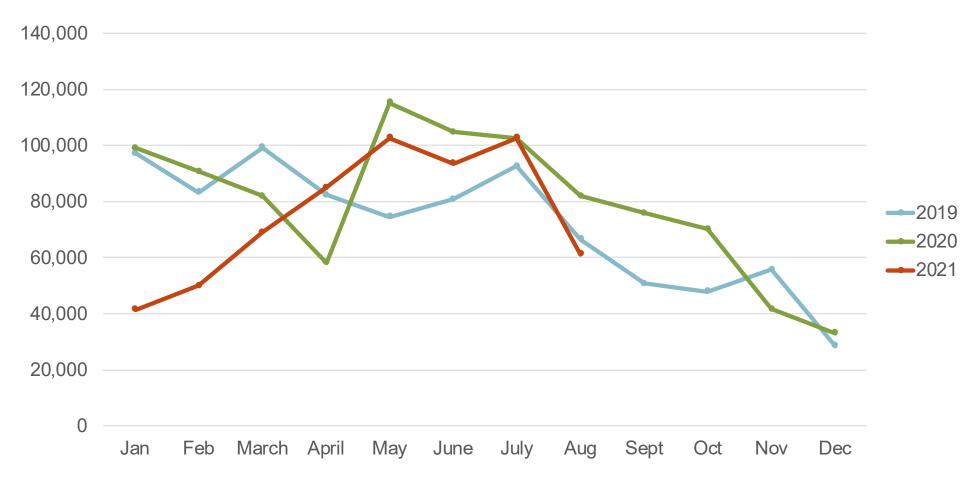






#### State Park Visitation

West Coast Region



Includes: Alamo Lake SP, Buckskin Mountain SP, Cattail Cove SP, Colorado River SHP, Lake Havasu SP, River Island SP, Yuma Territorial Prison SHP

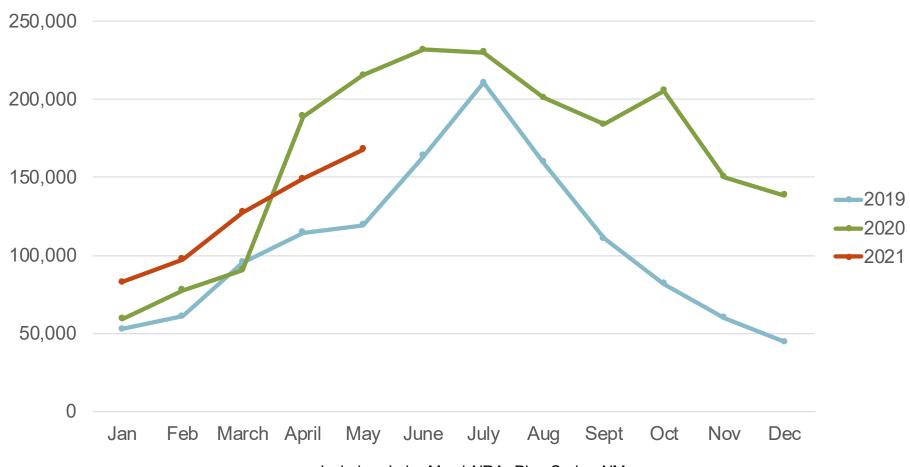
Source: State Park Visitation, Northern Arizona University, Arizona State Parks





## **National Park Visitation**

West Coast Region



Includes: Lake Mead NRA, Pipe Spring NM





# 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.

### **№3** 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

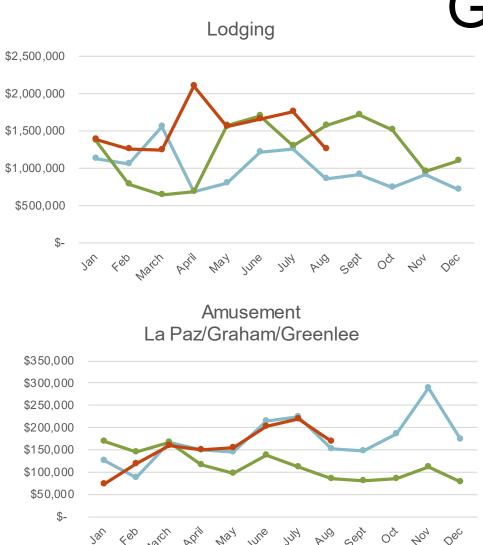
**Talking Points** 

**Digital Courses** 

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





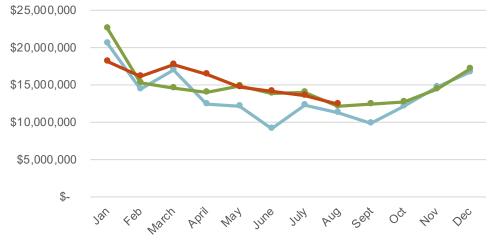


## **Gross Sales**

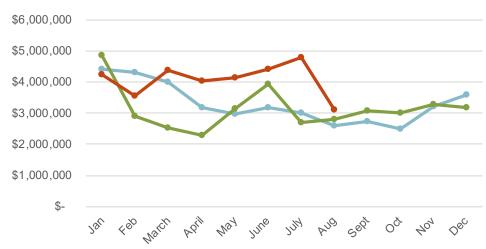








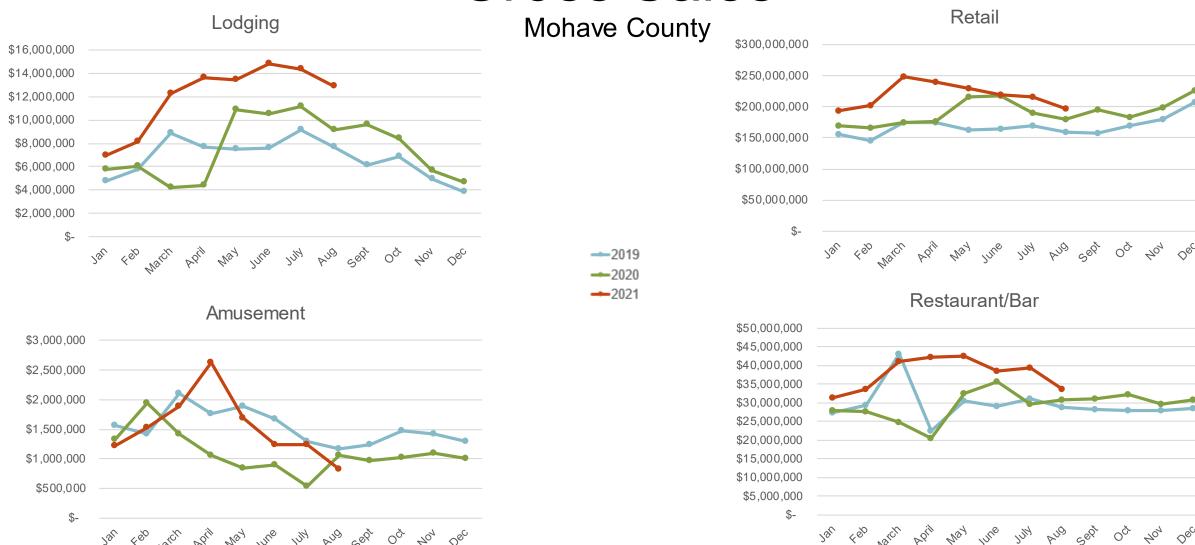
### Restaurant/Bar



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



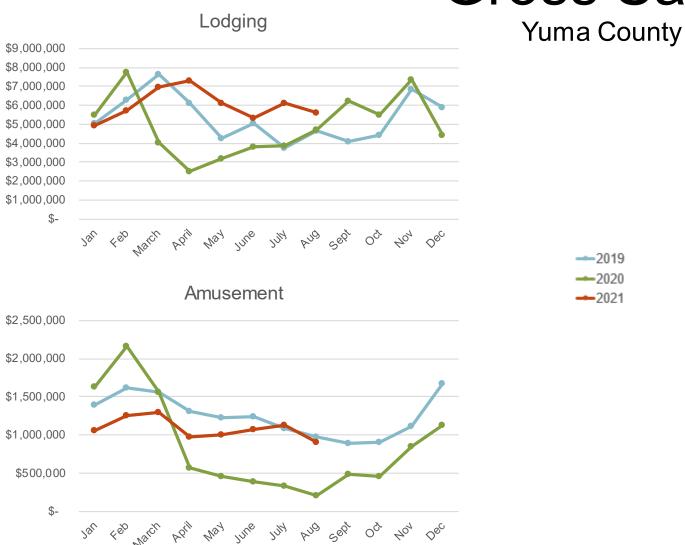
## **Gross Sales**

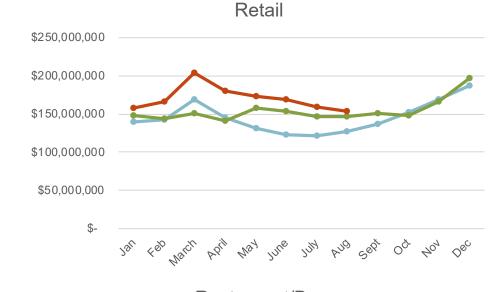


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue



## **Gross Sales**











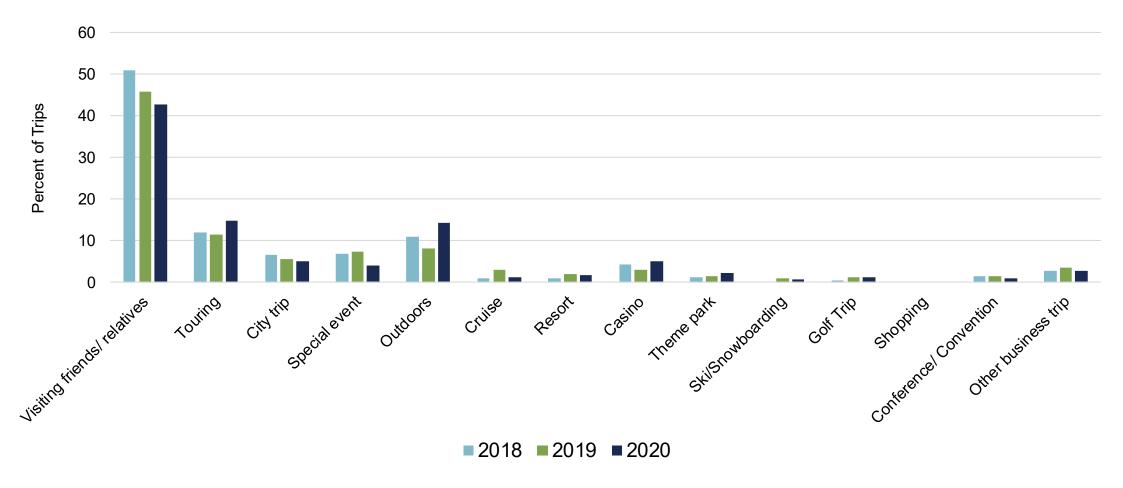
# **Traveler Behaviors**





# Main Purpose of Trip Trend

West Coast Region

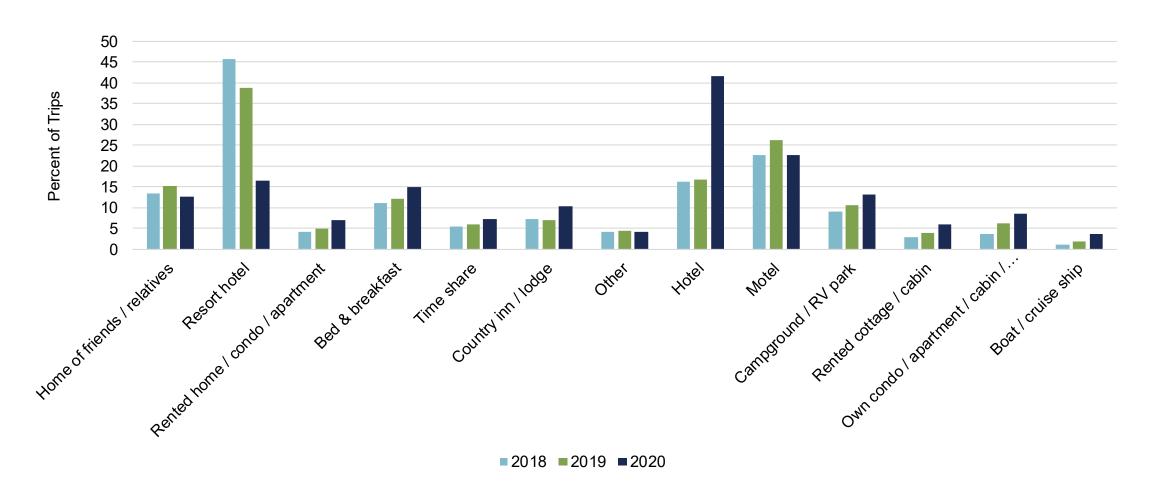






## **Accommodation Choice Trend**

West Coast Region





# Top Origin Markets West Coast Region

DMA	Percent of Trips in 2018
Los Angeles, CA	18
Phoenix, AZ	14
New York, NY	6
Houston, TX	5
San Diego, CA	4
Las Vegas, NV	4
Chicago, IL	3
San Francisco-Oakland-San Jose, CA	3
Tucson (Nogales), AZ	3
Fresno-Visalia, CA	2

DMA	Percent of Trips in 2019
Phoenix, AZ	20
Los Angeles, CA	19
New York, NY	4
Las Vegas, NV	3
Tucson (Nogales), AZ	3
Miami-Ft. Lauderdale, FL	3
Chicago, IL	2
Seattle-Tacoma, WA	2
Dallas-Ft. Worth, TX	2
Orlando-Daytona Beach- Melbrn, FL	2

DMA	Percent of Trips in 2020
Phoenix, AZ	17
Los Angeles, CA	17
New York, NY	7
San Diego, CA	3
Chicago, IL	3
Las Vegas, NV	2
Dallas-Ft. Worth, TX	2
Tampa-St. Petersburg- Sarasota, FL	2
Tucson (Nogales), AZ	2
Denver, CO	2

Source: Longwoods International





# Top Origin Markets 2021 West Coast Region

DMA	Percent of Trips in Q1 2021
Phoenix, AZ	27
Los Angeles, CA	11
New York, NY	5
Tucson (Nogales), AZ	4
Orlando-Daytona Beach-Melbrn, FL	3
Houston, TX	3
San Diego, CA	3
Washington, DC	2
Chicago, IL	2
Detroit, MI	2

DMA	Percent of Trips in Q2 2021
Phoenix, AZ	26
Los Angeles, CA	9
New York, NY	8
Chicago, IL	4
Little Rock-Pine Bluff, AR	4
San Francisco-Oakland-San Jose, CA	3
Salt Lake City, ID/UT	3
Denver, CO	2
Seattle-Tacoma, WA	2
Washington, DC	2

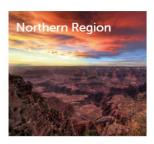
Source: Longwoods International





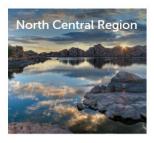
# 2020 Visitor profile











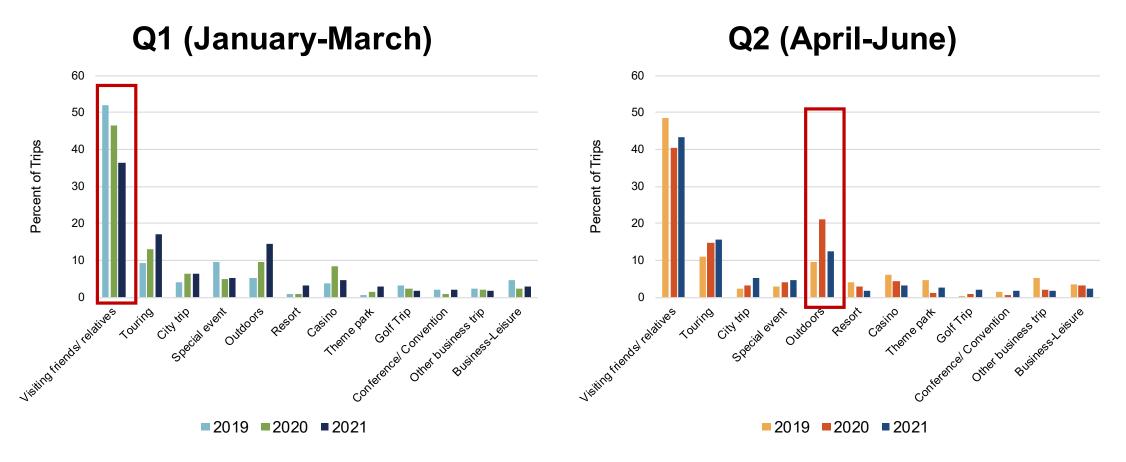


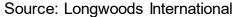




# Main Purpose of Trip

West Coast Region



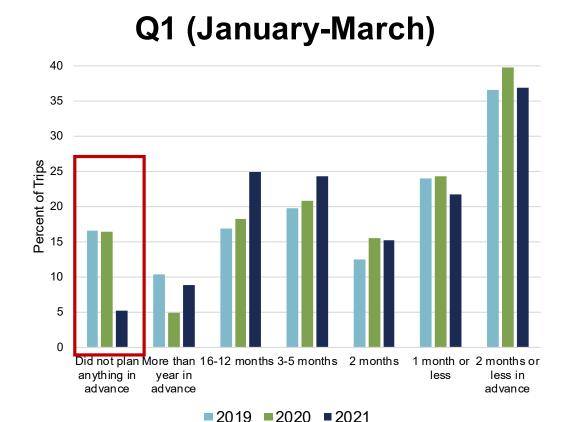




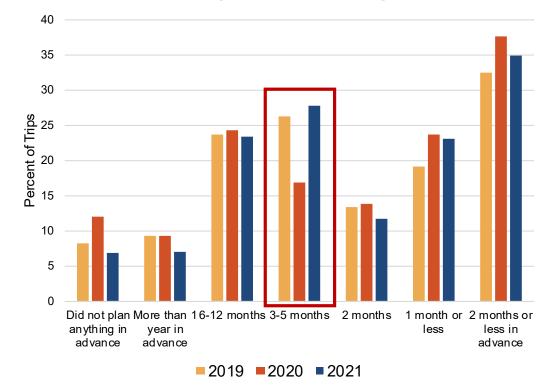


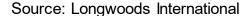
# Length of Trip Planning

West Coast Region



## Q2 (April-June)

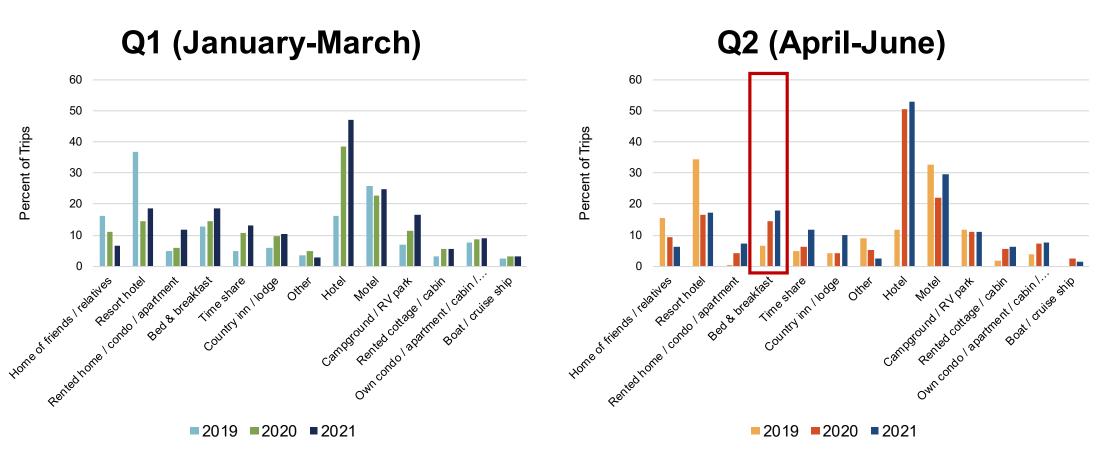


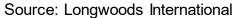




## Accommodation

West Coast Region

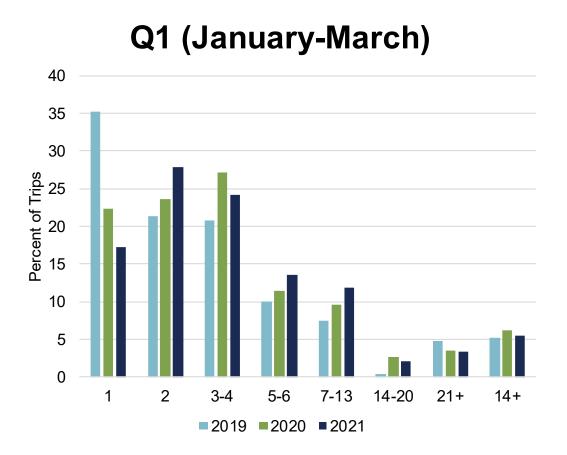


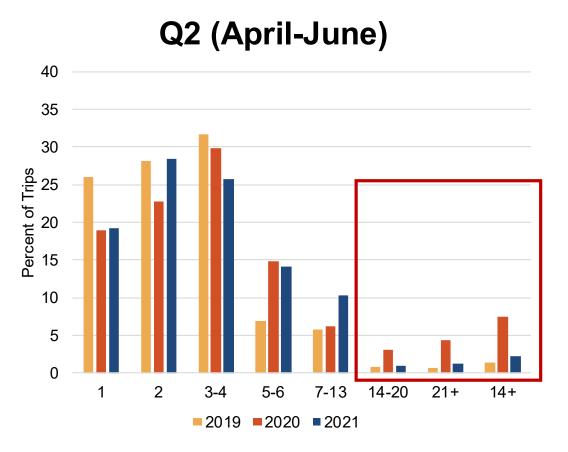




# **Total Nights Away**

West Coast Region

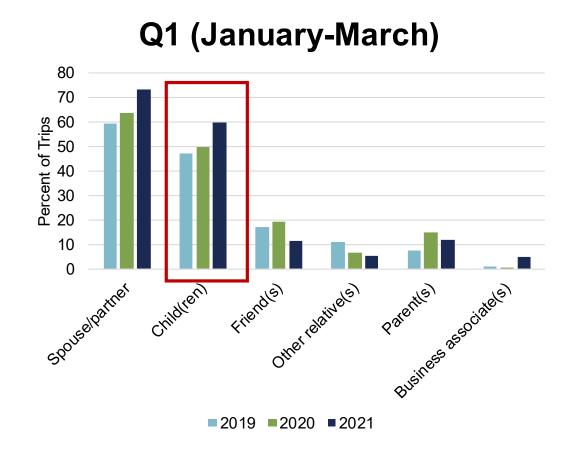


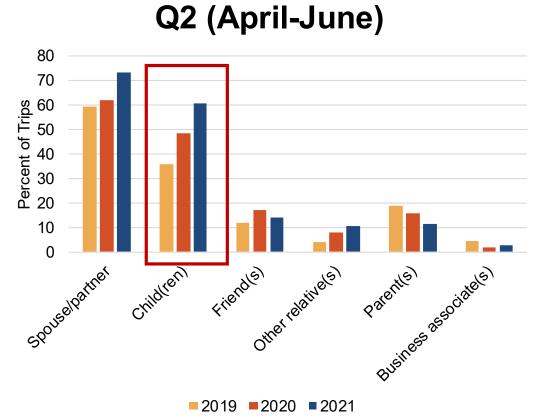


Source: Longwoods International

# **Travel Party Composition**

West Coast Region

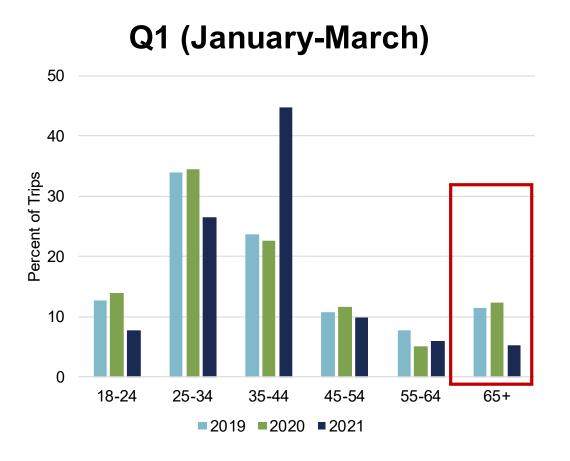


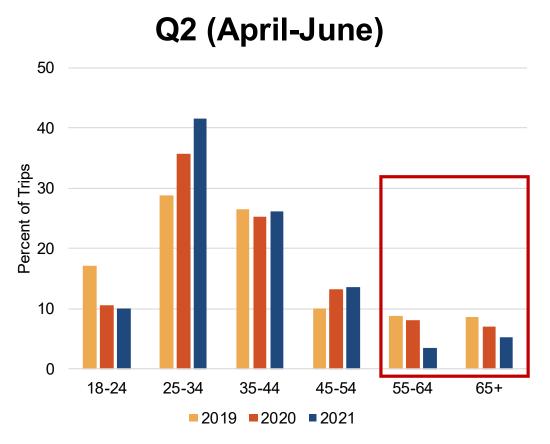






## Age West Coast Region





Source: Longwoods International





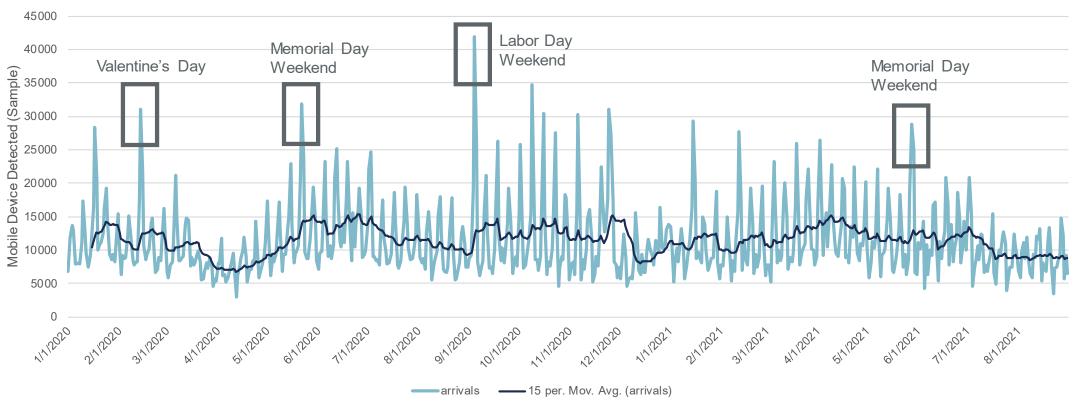
# La Paz County





# Trips by Arrival County Over Time









# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 - 8/31/21

La Paz County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Los Angeles	52.7%	31%	2 Days, 22 Hours, 9 Minutes
Phoenix	14.6%	29%	2 Days, 8 Hours, 31 Minutes
San Diego	5.9%	33%	3 Days, 8 Hours, 41 Minutes
Palm Springs	2.4%	35%	2 Days, 13 Hours, 53 Minutes
Sacramento/Stockton/Modesto	2.1%	21%	3 Days, 2 Hours, 11 Minutes
Yuma/El Centro	2.1%	36%	2 Days, 2 Hours, 21 Minutes
Tucson/Sierra Vista	2.0%	26%	3 Days, 2 Hours, 55 Minutes
San Francisco/Oakland/San Jose	1.5%	5%	3 Days, 21 Hours, 38 Minutes
Fresno/Visalia	1.5%	21%	2 Days, 13 Hours, 32 Minutes
Las Vegas	1.2%	33%	2 Days, 9 Hours, 31 Minutes

Source: Arrivalist



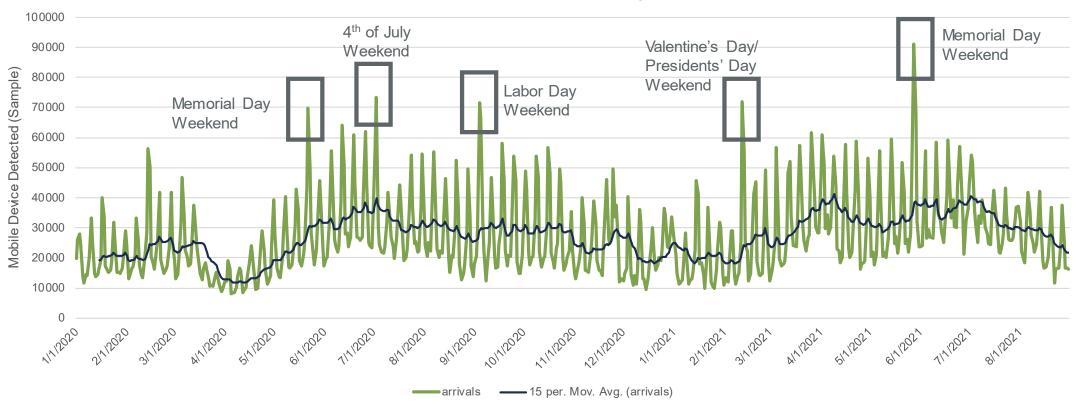






# Trips by Arrival County Over Time

## **Mohave County**







# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 - 8/31/21

**Mohave County** 

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
Los Angeles	41.9%	48%	2 Days, 8 Hours, 34 Minutes
Phoenix	10.6%	29%	1 Day, 13 Hours, 54 Minutes
Las Vegas	8.3%	31%	2 Days, 4 Hours, 7 Minutes
San Diego	3.1%	38%	2 Days, 18 Hours, 38 Minutes
Albuquerque/Santa Fe	2.4%	23%	1 Day, 6 Hours, 23 Minutes
Salt Lake City	2.3%	25%	3 Days, 4 Hours, 35 Minutes
Sacramento/Stockton/Modesto	2.0%	23%	2 Days, 5 Hours, 23 Minutes
Fresno/Visalia	1.9%	37%	1 Day, 15 Hours, 2 Minutes
Tucson/Sierra Vista	1.6%	17%	1 Day, 17 Hours, 58 Minutes
San Francisco/Oakland/San Jose	1.5%	7%	2 Days, 12 Hours, 22 Minutes

Source: Arrivalist



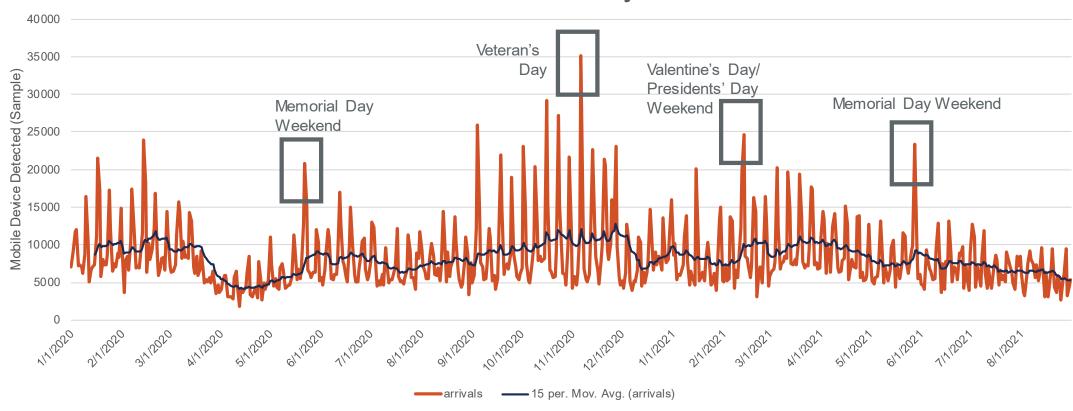






# Trips by Arrival County Over Time









# Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Yuma County

Origin DMA	Visitor Share	Repeat Visit Ratio	Average Time in Destination
San Diego	34.1%	25%	3 Days, 8 Hours, 9 Minutes
Los Angeles	9.9%	19%	1 Day, 21 Hours, 57 Minutes
Phoenix	6.4%	16%	1 Day, 9 Hours, 41 Minutes
Salt Lake City	3.2%	26%	2 Days, 15 Hours, 6 Minutes
Yuma/El Centro	3.2%	18%	2 Days, 6 Hours, 48 Minutes
Sacramento/Stockton/Modesto	2.5%	11%	2 Days, 1 Hour, 9 Minutes
Seattle/Tacoma	2.2%	9%	4 Days, 4 Hours, 50 Minutes
Tucson/Sierra Vista	2.1%	14%	1 Day, 13 Hours, 29 Minutes
San Francisco/Oakland/San Jose	1.9%	3%	2 Days, 9 Hours, 38 Minutes
Albuquerque/Santa Fe	1.8%	35%	2 Days, 2 Hours, 4 Minutes

Source: Arrivalist







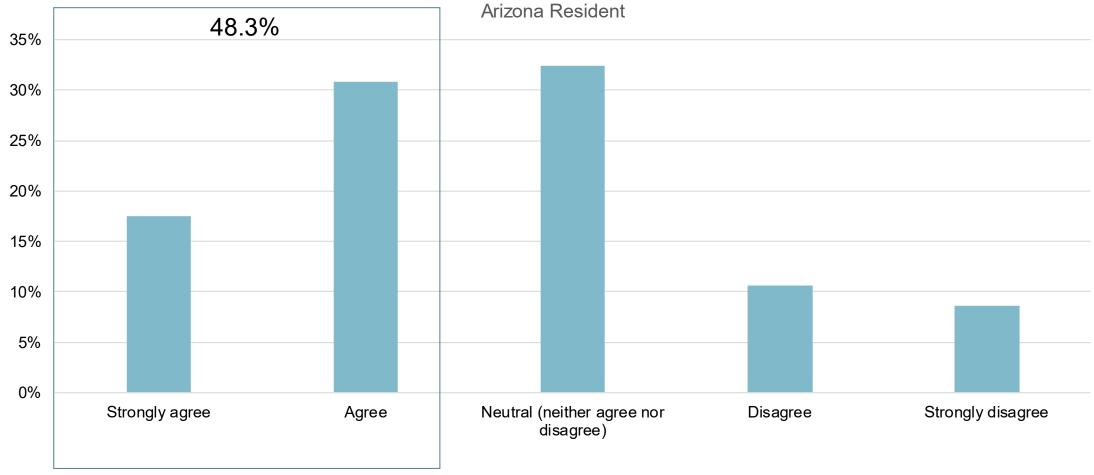


- Domestic American travelers
- Filtered for Arizona Residents
- July September 2021
- 253 responses





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







# **Arizona-Oriented Travelers**

- Domestic American travelers
- March 2020 September 2021
- 300-400 responses per wave

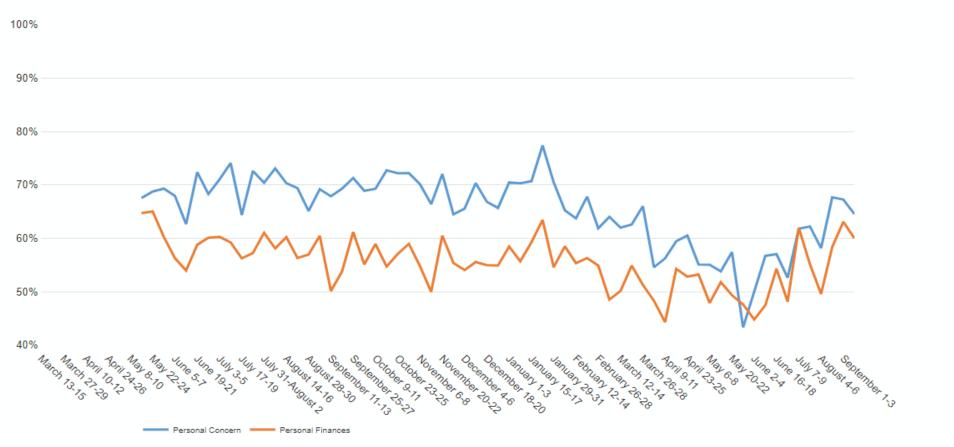
- Filtered for Arizona-Orientated which includes:
  - Visited Arizona (last 3 years)
  - Likely to Visit Arizona (next 3 years)





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

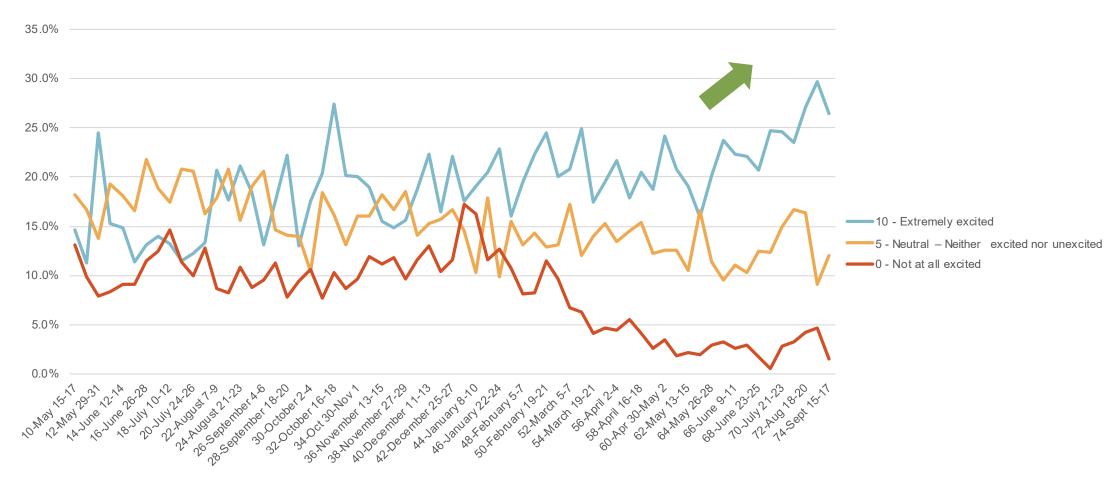
## Concern - Time Series







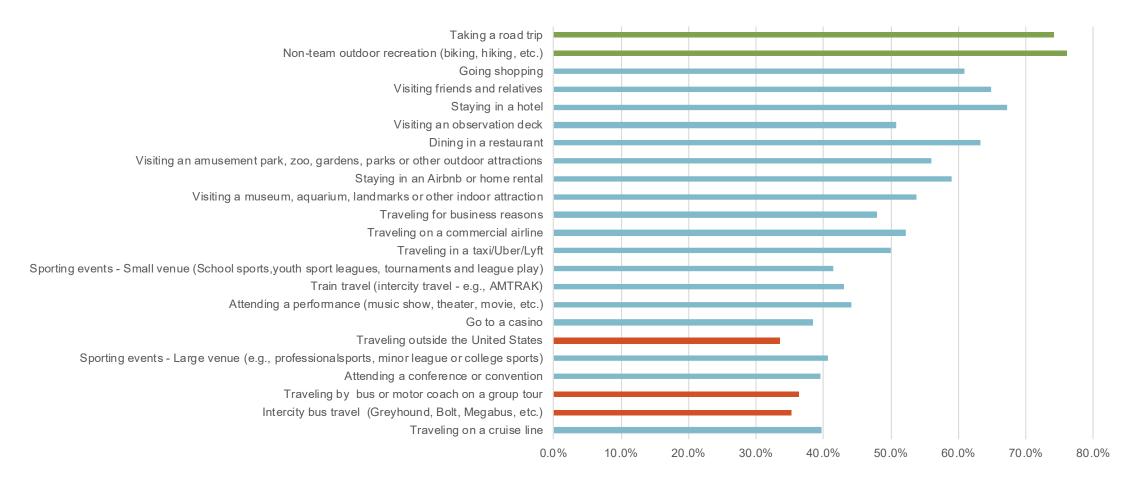
Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go?







# At this moment, how safe would you feel doing each type of travel activity?







## How Americans Feel About Travel

## **May – July 2020**

Apprehensive Hesitant Waiting

Awesome Uncertain Meh Unsure Ok Worried Uneasy Uncomforta Avaiting Alright Careful reluctant Hopeful Safe Anxious Sad Great finally Interested Anxious Sad Great finally Interested Anxious Sad Great finally Interested Impossible Nope Tired disappointed Wait Reserved Wait insecure Hectic Wary Reserved

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)

## **AOT Team:**

- Colleen Floyd, <u>cfloyd@tourism.az.gov</u>
- Kari Roberg, <a href="mailto:kroberg@tourism.az.gov">kroberg@tourism.az.gov</a>
- Lena Allen, <u>lallen@tourism.az.gov</u>



