Travel Research Trends
West Coast Region
November 5, 2021
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
Arizona Tourism in 2020

32.1 million Overnight Visitors

$15 billion Travel Spending

-31%

-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
Domestic Overnight Visitation to Arizona
% Change compared to 2019

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

Source: Tourism Economics

<table>
<thead>
<tr>
<th></th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>-17%</td>
<td>-18%</td>
<td>-49%</td>
<td>-42%</td>
</tr>
<tr>
<td>2021</td>
<td>-37%</td>
<td>-65%</td>
<td>-50%</td>
<td>-40%</td>
</tr>
</tbody>
</table>

Source: Tourism Economics
Domestic Overnight Visitation to Arizona

% Change compared to 2019

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)

La Paz County

Direct Travel Spending
- $12.4 Million
  -7.4%

Accommodations Spending
+ $2.8 Million
  +16.3%

Food Service Spending
- $2.8 Million
  -%

Local Tax Receipts
- $300,000
  -4.4%

Employment*
- 80 jobs
  -5.7%

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
-12.8%

Food Service Spending
-$41.8 Million
-22.1%

Employment*
-820 jobs
-12.8%

Earnings*
-$9.2 Million
-5.1%

*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)

Yuma County

Direct Travel Spending
- $198.1 Million
  -29.7%

Accommodations Spending
- $7.5 Million
  -8.9%

Local Tax Receipts
- $6.1 Million
  -25.0%

Food Service Spending
- $41.4 Million
  -29.1%

Employment*
- 1,610 jobs
  -23.3%

Earnings*
- $27.2 Million
  -14.5%

*Employment and Earnings include CARES Act support

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p
Spending by Commodity Purchased
La Paz County

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

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

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

% change

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020
Spend by Accommodation Choice
La Paz County

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020

*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, 2020

*STVR stands for Short-Term Vacation Rental
Spend by Accommodation Choice Trend
La Paz County

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020

*STVR stands for Short-Term Vacation Rental
Spend by Accommodation Choice Trend
Mohave County

Source: Arizona Travel Impacts, Dean Runyan Associates, 2020p
*STVR stands for Short-Term Vacation Rental
Spend by Accommodation Choice Trend
Yuma County

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

*STVR stands for Short-Term Vacation Rental
2021 Tourism Indicators To-Date

West Coast Region

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

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

Source: STR. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.
Airbnb – West Coast Region
YOY % Change

**Supply**
- West Coast Region: 36%

**Demand**
- West Coast Region: 46%

Source: AirDNA
Airbnb – City Level
YOY % Change

Supply

Demand

Lake Havasu City

39%

46%

Source: AirDNA
Airport Passenger Traffic
Phoenix Sky Harbor - Domestic

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

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
La Paz County

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

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

Source: Longwoods International
Accommodation Choice Trend

West Coast Region

Source: Longwoods International

Percent of Trips

2018 2019 2020

Home of friends/relatives
Rented home/condo/apartment
Bed & breakfast
Time share
Country inn/lodge
Other
Hotel
Motel
Campground/RV park
Rented cottage/cabin
Own condo/apartment/cabin/...
# Top Origin Markets
## West Coast Region

<table>
<thead>
<tr>
<th>DMA</th>
<th>DMA</th>
<th>DMA</th>
<th>DMA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Percent of Trips in 2018</strong></td>
<td><strong>Percent of Trips in 2019</strong></td>
<td><strong>Percent of Trips in 2020</strong></td>
<td></td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>Phoenix, AZ</td>
<td>Phoenix, AZ</td>
<td>Los Angeles, CA</td>
</tr>
<tr>
<td>18</td>
<td>20</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Phoenix, AZ</td>
<td>Los Angeles, CA</td>
<td>Los Angeles, CA</td>
<td>17</td>
</tr>
<tr>
<td>14</td>
<td>19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New York, NY</td>
<td>New York, NY</td>
<td>New York, NY</td>
<td>7</td>
</tr>
<tr>
<td>6</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Houston, TX</td>
<td>Las Vegas, NV</td>
<td>San Diego, CA</td>
<td>3</td>
</tr>
<tr>
<td>5</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Diego, CA</td>
<td>Tucson (Nogales), AZ</td>
<td>Chicago, IL</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>Miami-Ft. Lauderdale, FL</td>
<td>Las Vegas, NV</td>
<td>2</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>Chicago, IL</td>
<td>Las Vegas, NV</td>
<td>3</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Francisco-Oakland-San Jose, CA</td>
<td>3</td>
<td>Dallas-Ft. Worth, TX</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tucson (Nogales), AZ</td>
<td>Seattle-Tacoma, WA</td>
<td>Tampa-St. Petersburg-Sarasota, FL</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresno-Visalia, CA</td>
<td>Orlando-Daytona Beach-Melbrn, FL</td>
<td>Tampa-St. Petersburg-Sarasota, FL</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Longwoods International
# Top Origin Markets 2021

## West Coast Region

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

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

Source: Longwoods International
2020 Visitor profile

Regional Profiles

The Tourism Office generates, tracks, and evaluates data about domestic and international travel behavior, economic impacts, and industry trends, and serves as the research and policy office for all travel-related tourism
information functions. Arizona Tourism is supported by the Federal, state, and private
funding partners, government agencies, and industry partners. This collaboration
helps achieve the strategic goals of ATO and collaboratively informs research efforts to
better understand and reach targeted markets.

https://tourism.az.gov/regional-profiles/
Main Purpose of Trip
West Coast Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Length of Trip Planning
West Coast Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Accommodation
West Coast Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Total Nights Away
West Coast Region

Q1 (January-March)

Source: Longwoods International
Travel Party Composition
West Coast Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
Age
West Coast Region

Q1 (January-March)

Q2 (April-June)

Source: Longwoods International
La Paz County
Trips by Arrival County Over Time

La Paz County

Source: Arrivalist
## Top Origin Markets for Overnight Stays

**Time Period: 1/1/2020 – 8/31/21**

**La Paz 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>52.7%</td>
<td>31%</td>
<td>2 Days, 22 Hours, 9 Minutes</td>
</tr>
<tr>
<td>Phoenix</td>
<td>14.6%</td>
<td>29%</td>
<td>2 Days, 8 Hours, 31 Minutes</td>
</tr>
<tr>
<td>San Diego</td>
<td>5.9%</td>
<td>33%</td>
<td>3 Days, 8 Hours, 41 Minutes</td>
</tr>
<tr>
<td>Palm Springs</td>
<td>2.4%</td>
<td>35%</td>
<td>2 Days, 13 Hours, 53 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>2.1%</td>
<td>21%</td>
<td>3 Days, 2 Hours, 11 Minutes</td>
</tr>
<tr>
<td>Yuma/El Centro</td>
<td>2.1%</td>
<td>36%</td>
<td>2 Days, 2 Hours, 21 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>2.0%</td>
<td>26%</td>
<td>3 Days, 2 Hours, 55 Minutes</td>
</tr>
<tr>
<td>San Francisco/Oakland/San Jose</td>
<td>1.5%</td>
<td>5%</td>
<td>3 Days, 21 Hours, 38 Minutes</td>
</tr>
<tr>
<td>Fresno/Visalia</td>
<td>1.5%</td>
<td>21%</td>
<td>2 Days, 13 Hours, 32 Minutes</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>1.2%</td>
<td>33%</td>
<td>2 Days, 9 Hours, 31 Minutes</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Mohave County
Trips by Arrival County Over Time

Mohave County

Memorial Day Weekend 4th of July Weekend Labor Day Weekend Valentine's Day/Presidents’ Day Weekend Memorial Day Weekend

Source: Arrivalist
Top Origin Markets for Overnight Stays

Time Period: 1/1/2020 – 8/31/21

Mohave 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>41.9%</td>
<td>48%</td>
<td>2 Days, 8 Hours, 34 Minutes</td>
</tr>
<tr>
<td>Phoenix</td>
<td>10.6%</td>
<td>29%</td>
<td>1 Day, 13 Hours, 54 Minutes</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>8.3%</td>
<td>31%</td>
<td>2 Days, 4 Hours, 7 Minutes</td>
</tr>
<tr>
<td>San Diego</td>
<td>3.1%</td>
<td>38%</td>
<td>2 Days, 18 Hours, 38 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>2.4%</td>
<td>23%</td>
<td>1 Day, 6 Hours, 23 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>2.3%</td>
<td>25%</td>
<td>3 Days, 4 Hours, 35 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>2.0%</td>
<td>23%</td>
<td>2 Days, 5 Hours, 23 Minutes</td>
</tr>
<tr>
<td>Fresno/Visalia</td>
<td>1.9%</td>
<td>37%</td>
<td>1 Day, 15 Hours, 2 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>1.6%</td>
<td>17%</td>
<td>1 Day, 17 Hours, 58 Minutes</td>
</tr>
<tr>
<td>San Francisco/Oakland/San Jose</td>
<td>1.5%</td>
<td>7%</td>
<td>2 Days, 12 Hours, 22 Minutes</td>
</tr>
</tbody>
</table>

Source: Arrivalist
Yuma County
Trips by Arrival County Over Time

Yuma County

Source: Arrivalist
## Top Origin Markets for Overnight Stays

**Time Period: 1/1/2020 – 8/31/21**

**Yuma 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>San Diego</td>
<td>34.1%</td>
<td>25%</td>
<td>3 Days, 8 Hours, 9 Minutes</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>9.9%</td>
<td>19%</td>
<td>1 Day, 21 Hours, 57 Minutes</td>
</tr>
<tr>
<td>Phoenix</td>
<td>6.4%</td>
<td>16%</td>
<td>1 Day, 9 Hours, 41 Minutes</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>3.2%</td>
<td>26%</td>
<td>2 Days, 15 Hours, 6 Minutes</td>
</tr>
<tr>
<td>Yuma/El Centro</td>
<td>3.2%</td>
<td>18%</td>
<td>2 Days, 6 Hours, 48 Minutes</td>
</tr>
<tr>
<td>Sacramento/Stockton/Modesto</td>
<td>2.5%</td>
<td>11%</td>
<td>2 Days, 1 Hour, 9 Minutes</td>
</tr>
<tr>
<td>Seattle/Tacoma</td>
<td>2.2%</td>
<td>9%</td>
<td>4 Days, 4 Hours, 50 Minutes</td>
</tr>
<tr>
<td>Tucson/Sierra Vista</td>
<td>2.1%</td>
<td>14%</td>
<td>1 Day, 13 Hours, 29 Minutes</td>
</tr>
<tr>
<td>San Francisco/Oakland/San Jose</td>
<td>1.9%</td>
<td>3%</td>
<td>2 Days, 9 Hours, 38 Minutes</td>
</tr>
<tr>
<td>Albuquerque/Santa Fe</td>
<td>1.8%</td>
<td>35%</td>
<td>2 Days, 2 Hours, 4 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?

- Taking a road trip
- Non-team outdoor recreation (biking, hiking, etc.)
- Going shopping
- Visiting friends and relatives
- Staying in a hotel
- Visiting an observation deck
- Dining in a restaurant
- Visiting an amusement park, zoo, gardens, parks or other outdoor attractions
- Staying in an Airbnb or home rental
- Visiting a museum, aquarium, landmarks or other indoor attraction
- Traveling for business reasons
- Traveling on a commercial airline
- Traveling in a taxi/Uber/Lyft
- Sporting events - Small venue (School sports, youth sport leagues, tournaments and league play)
- Train travel (intercity travel - e.g., AMTRAK)
- Attending a performance (music show, theater, movie, etc.)
- Go to a casino
- Traveling outside the United States
- Sporting events - Large venue (e.g., professional sports, minor league or college sports)
- Attending a conference or convention
- Traveling by bus or motor coach on a group tour
- Intercity bus travel (Greyhound, Bolt, Megabus, etc.)
- Traveling on a cruise line

Source: Destination Analysts
How Americans Feel About Travel

May – July 2020

Source: Destination Analysts

July – September 2021

Source: Destination Analysts
Resources

- [www.tourism.az.gov](http://www.tourism.az.gov)
- [https://www.ustravel.org/toolkit/covid-19-travel-industry-research](https://www.ustravel.org/toolkit/covid-19-travel-industry-research)
- [https://www.visitarizona.com/leave-no-trace/](https://www.visitarizona.com/leave-no-trace/) (for consumers)
- [https://tourism.az.gov/leavenotrace/](https://tourism.az.gov/leavenotrace/) (for destinations)

AOT Team:
- Colleen Floyd, cfloyd@tourism.az.gov
- Kari Roberg, kroberg@tourism.az.gov
- Lena Allen, lallen@tourism.az.gov
Thank you!

Photo credit: An Pham