

# Tourism Industry Research Update

Arizona Governor's Conference on Tourism

July 13, 2022





# 2021 Year-End Industry Performance

**Overnight Visitation**

**40.9  
million**

**Direct Travel Spend**

**\$23.6  
billion**

# 2021 Year-End Industry Performance

## Overnight Visitation

27%



VS.  
2020

## Direct Travel Spend

58%

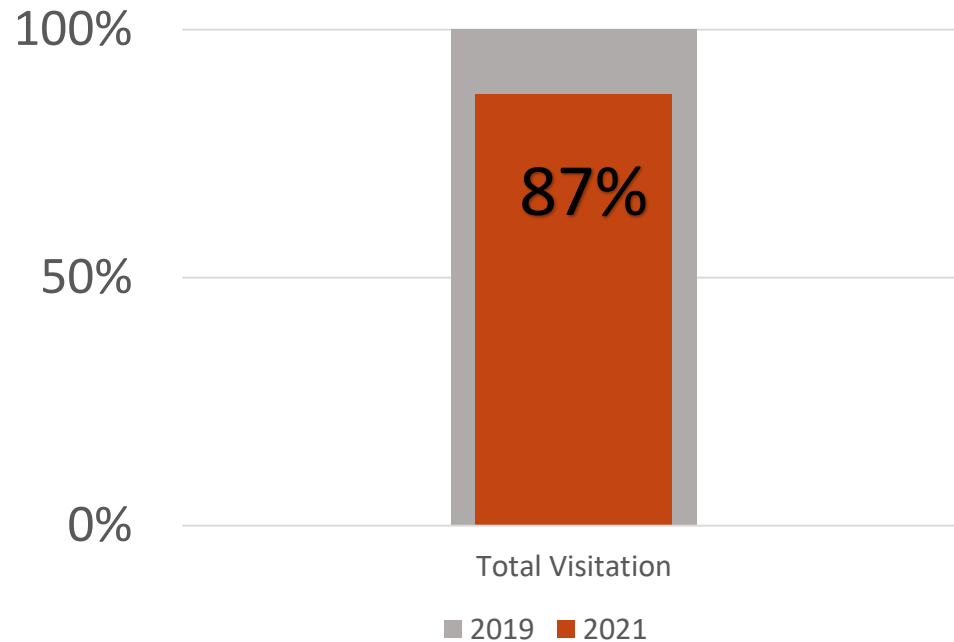


VS.  
2020

# 2021 Year-End Industry Performance

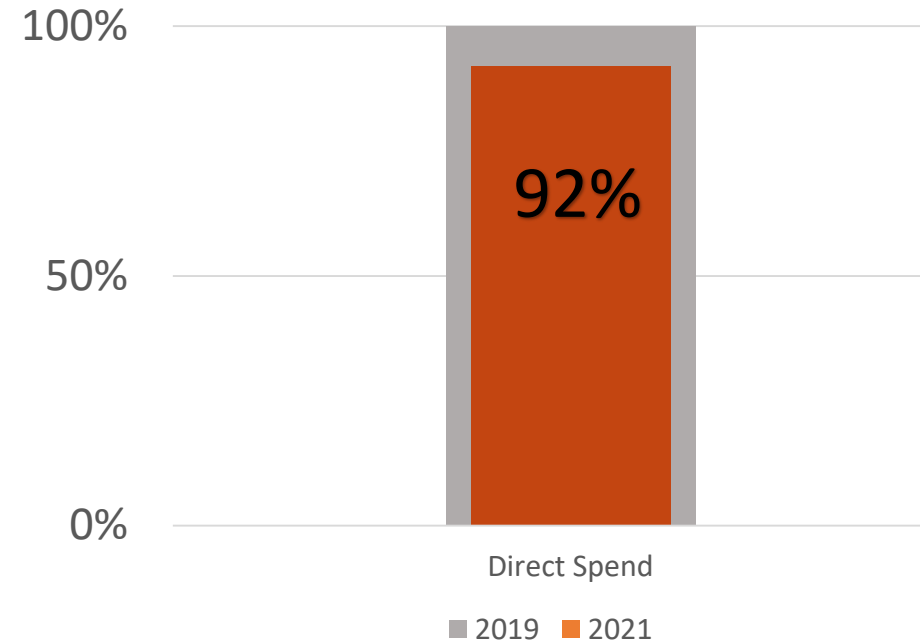
## Overnight Visitation

% of 2019 levels

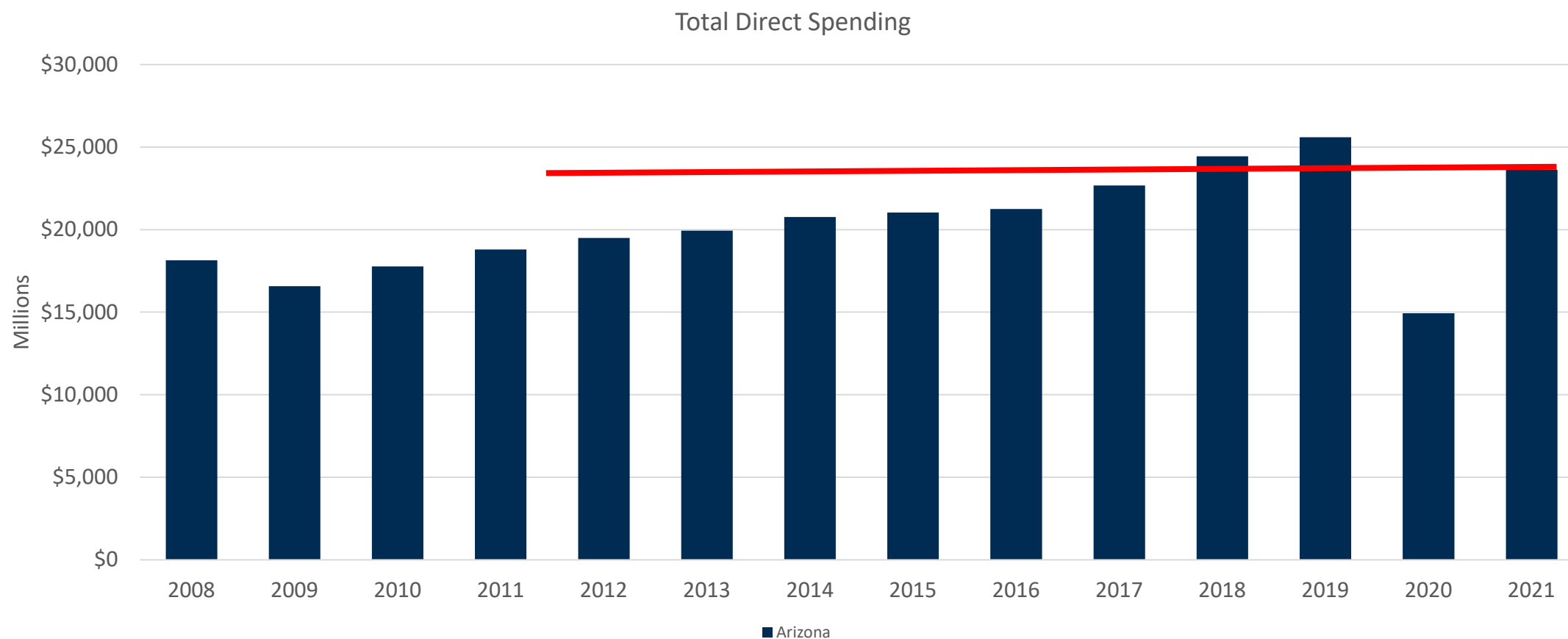


## Direct Travel Spend

% of 2019 levels

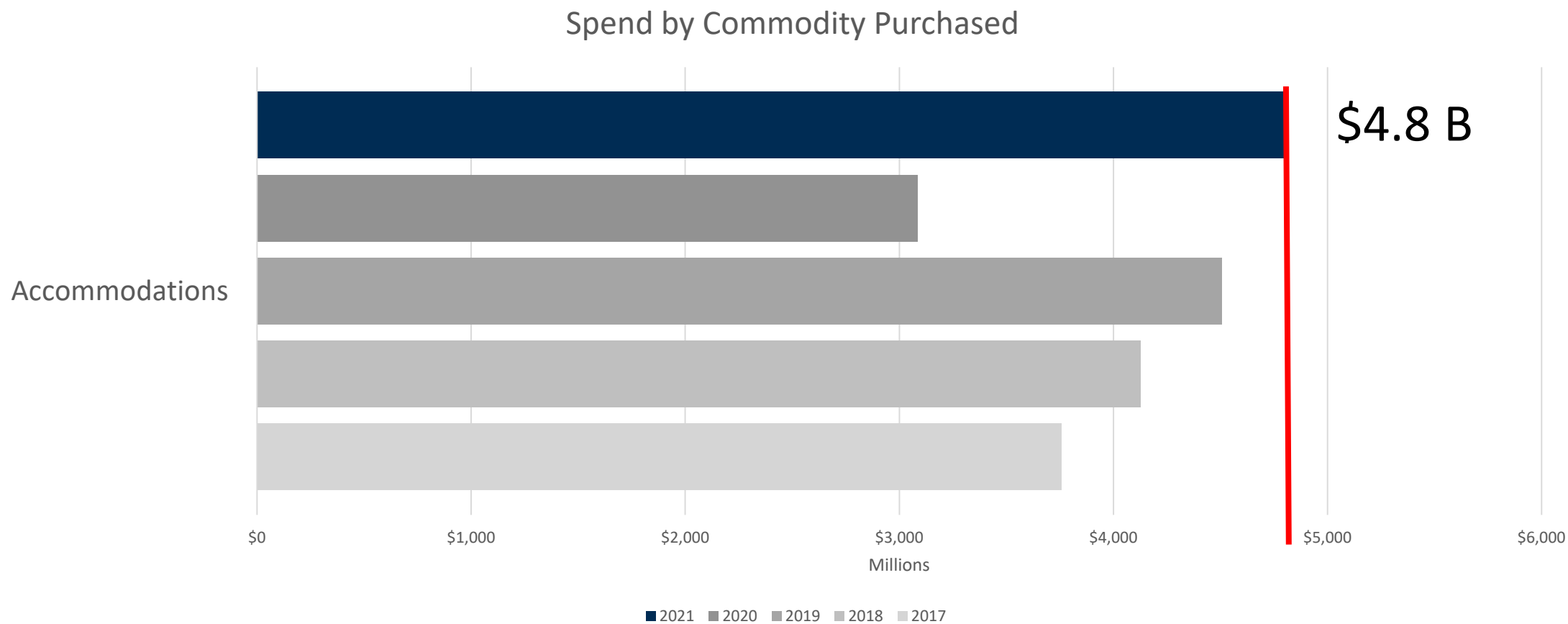


# Direct Spending



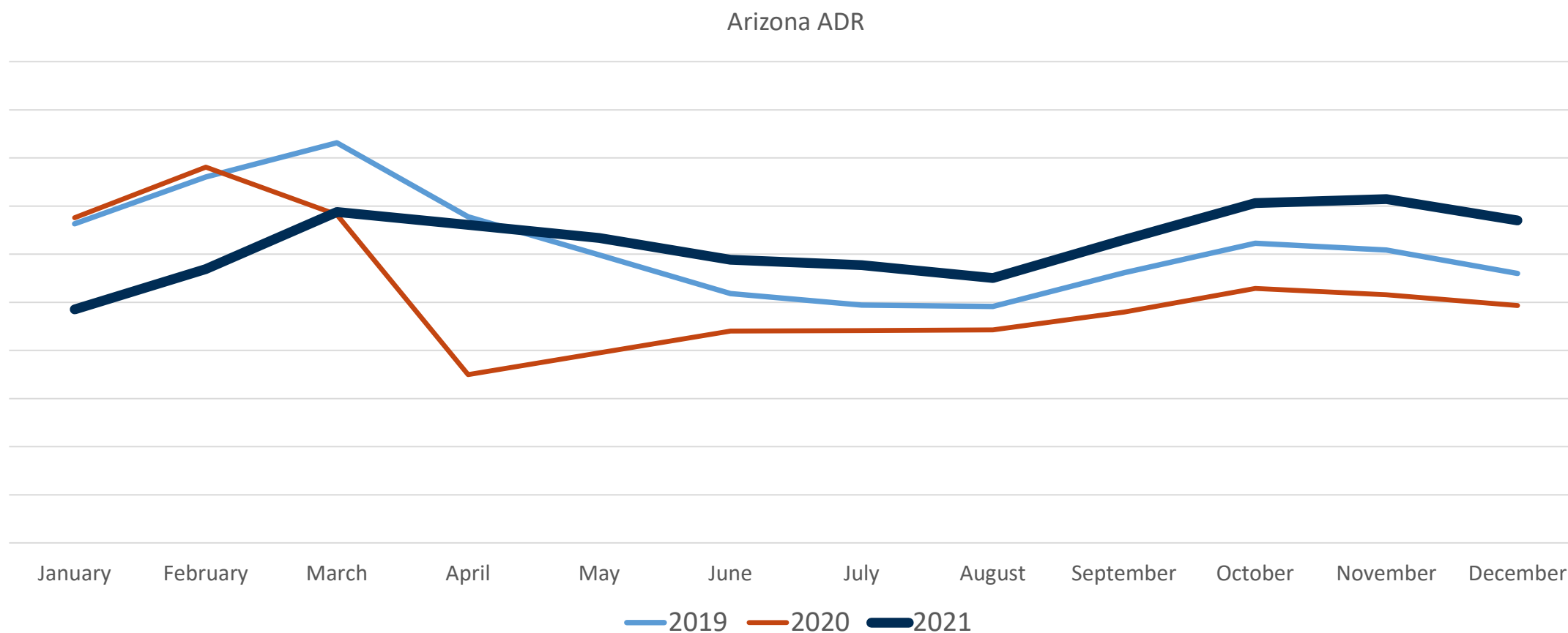
Source: Dean Runyan Associates

# Recovery by Sector



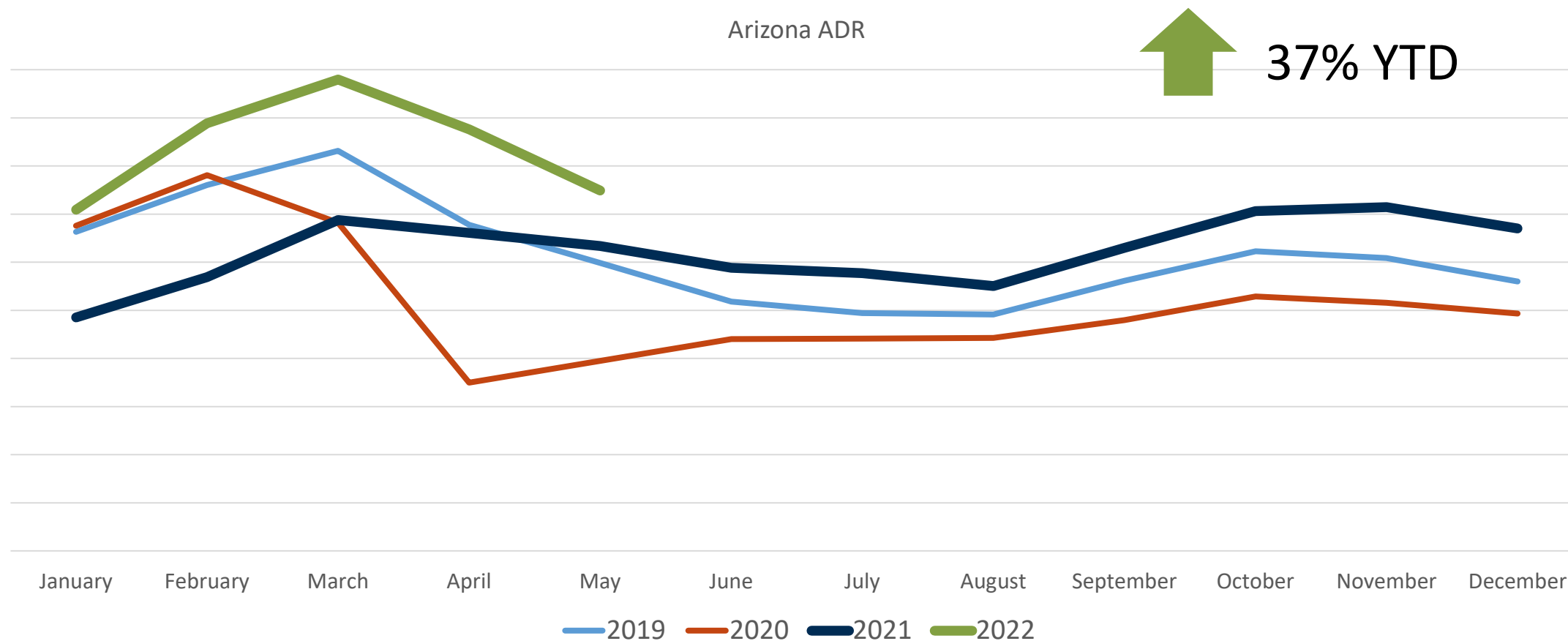
Source: Dean Runyan Associates

# Recovery by Sector - Accommodations



Source: STR, REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS PERMISSION OF STR IS STRICTLY PROHIBITED

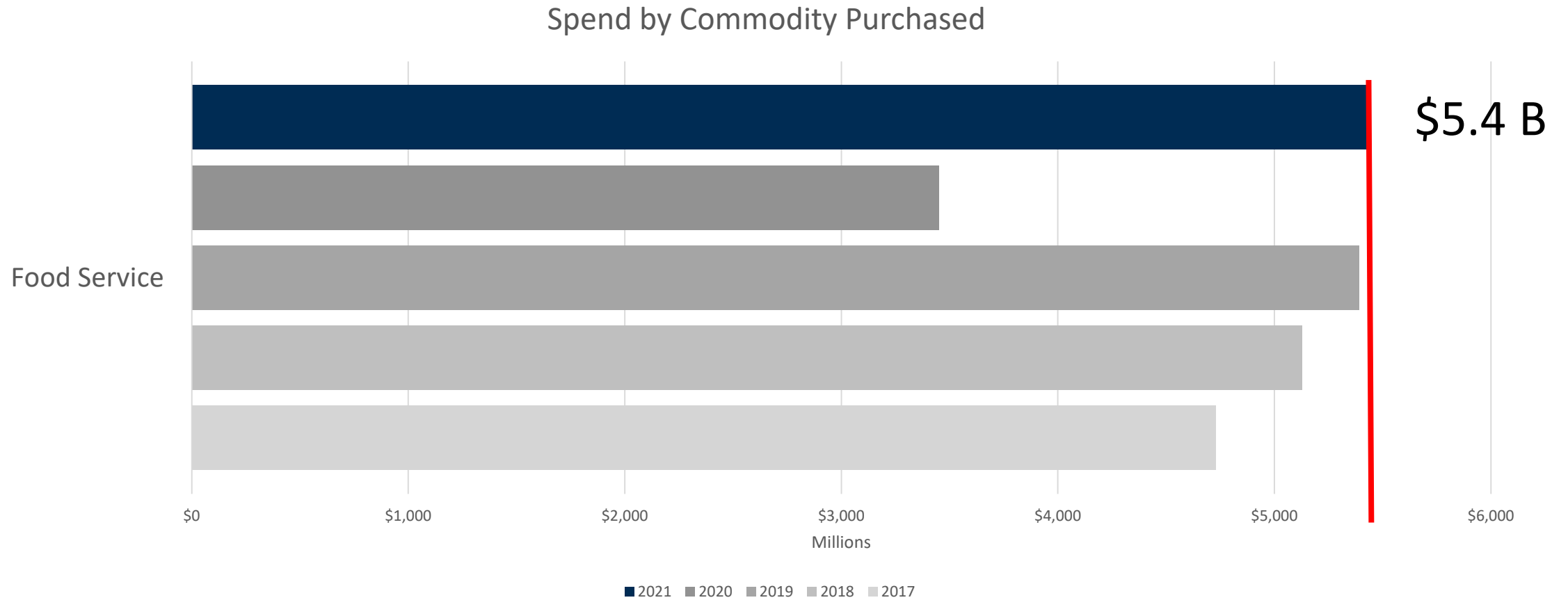
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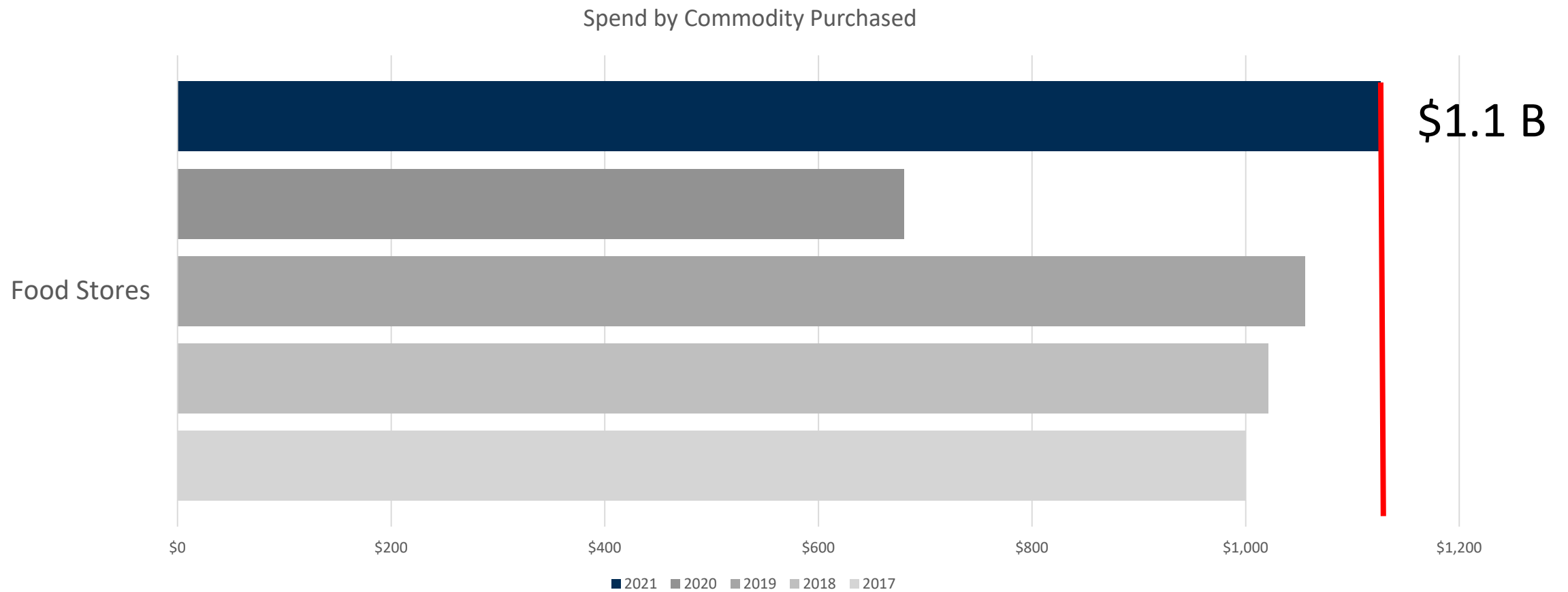


# Recovery by Sector



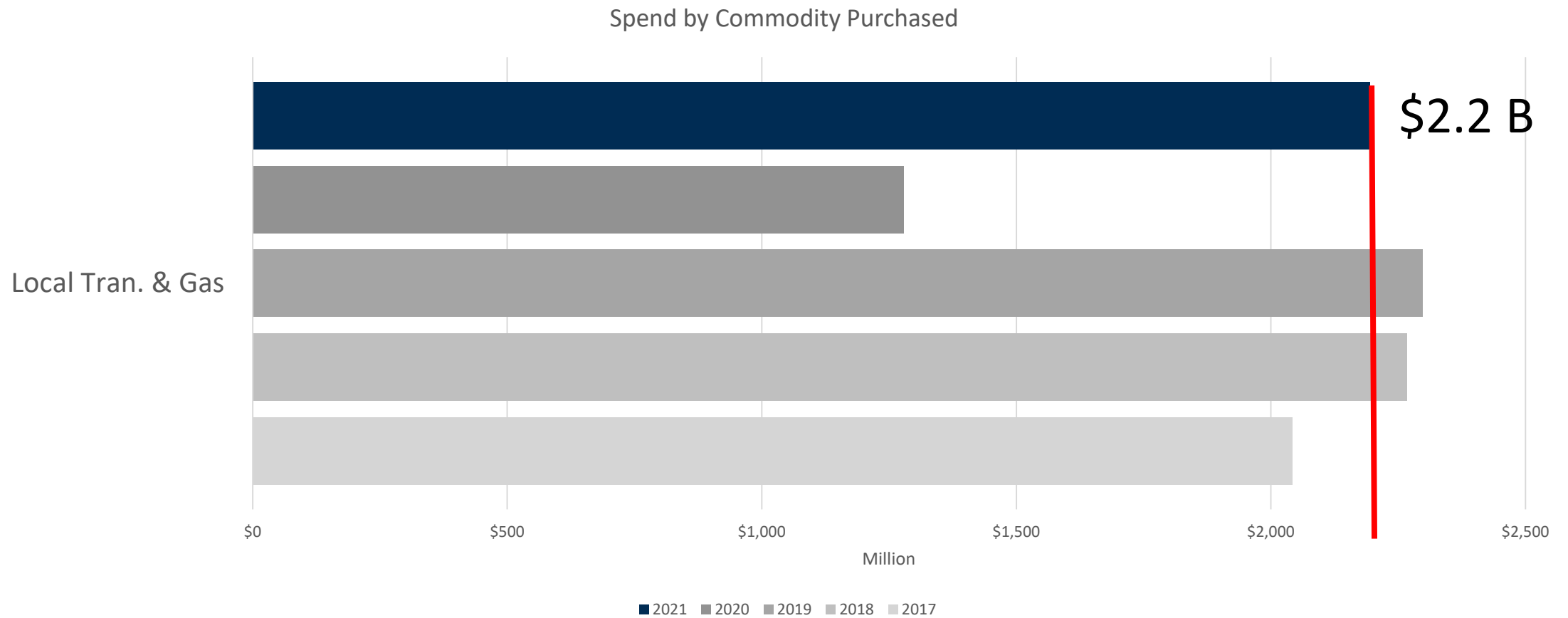
Source: Dean Runyan Associates

# Recovery by Sector



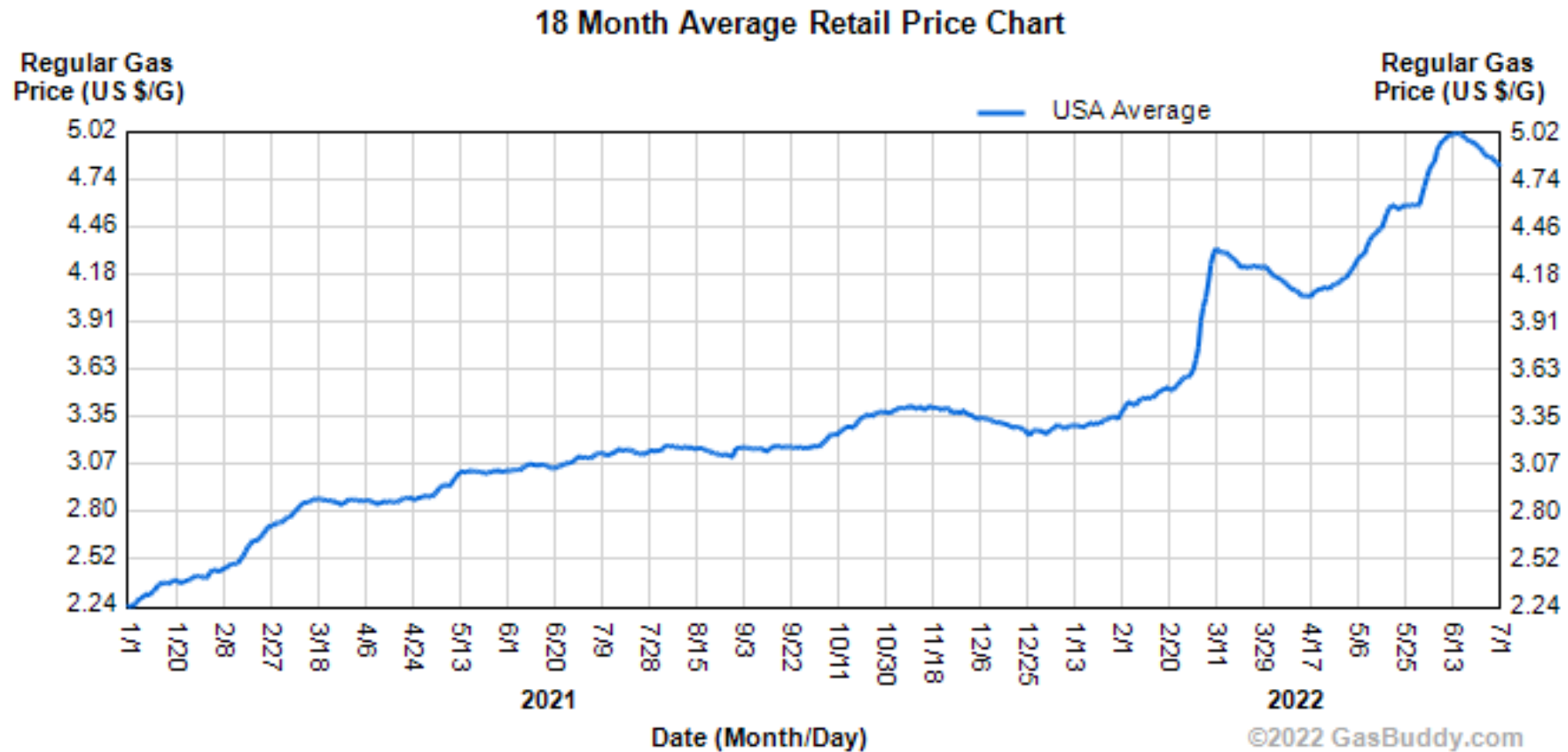
Source: Dean Runyan Associates

# Recovery by Sector

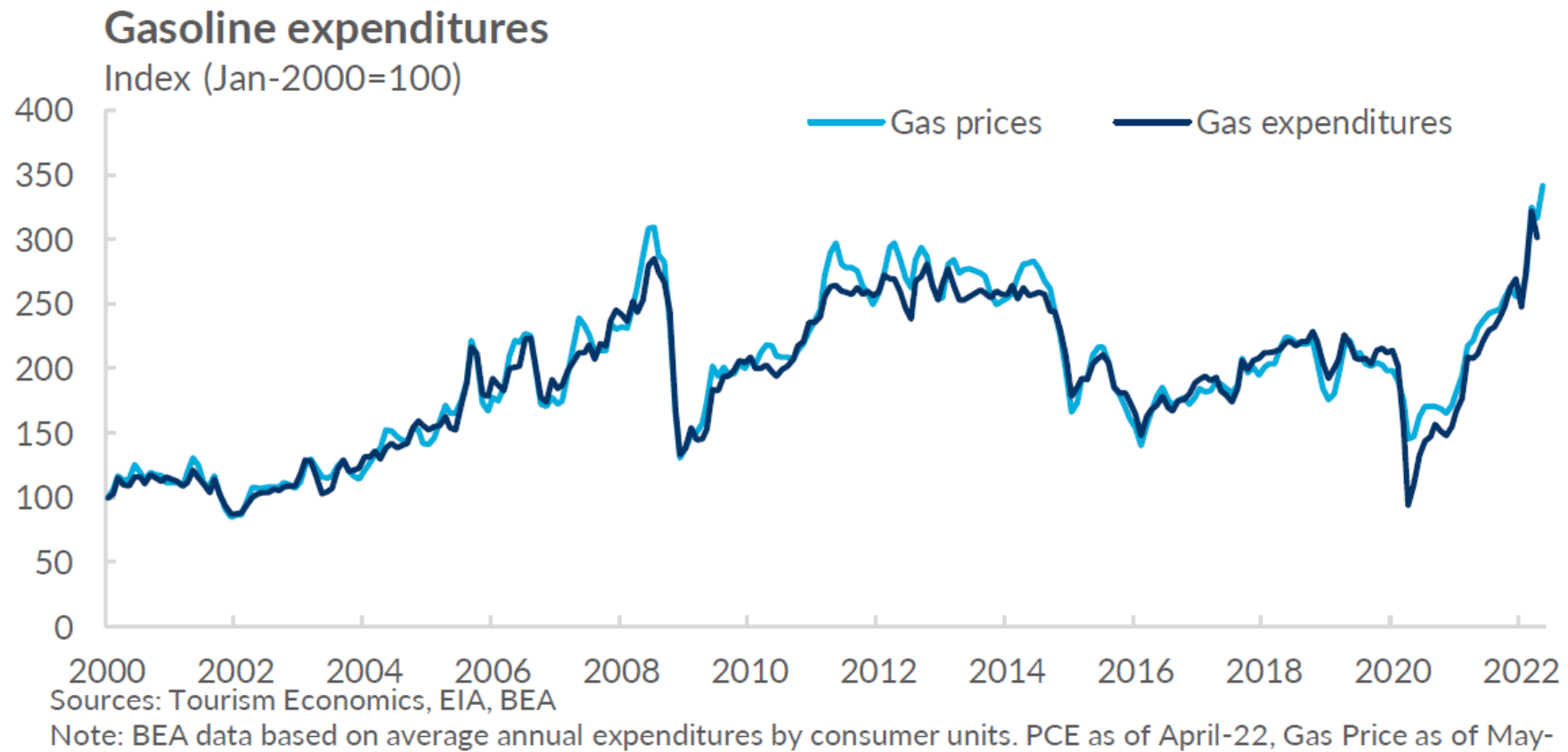


Source: Dean Runyan Associates

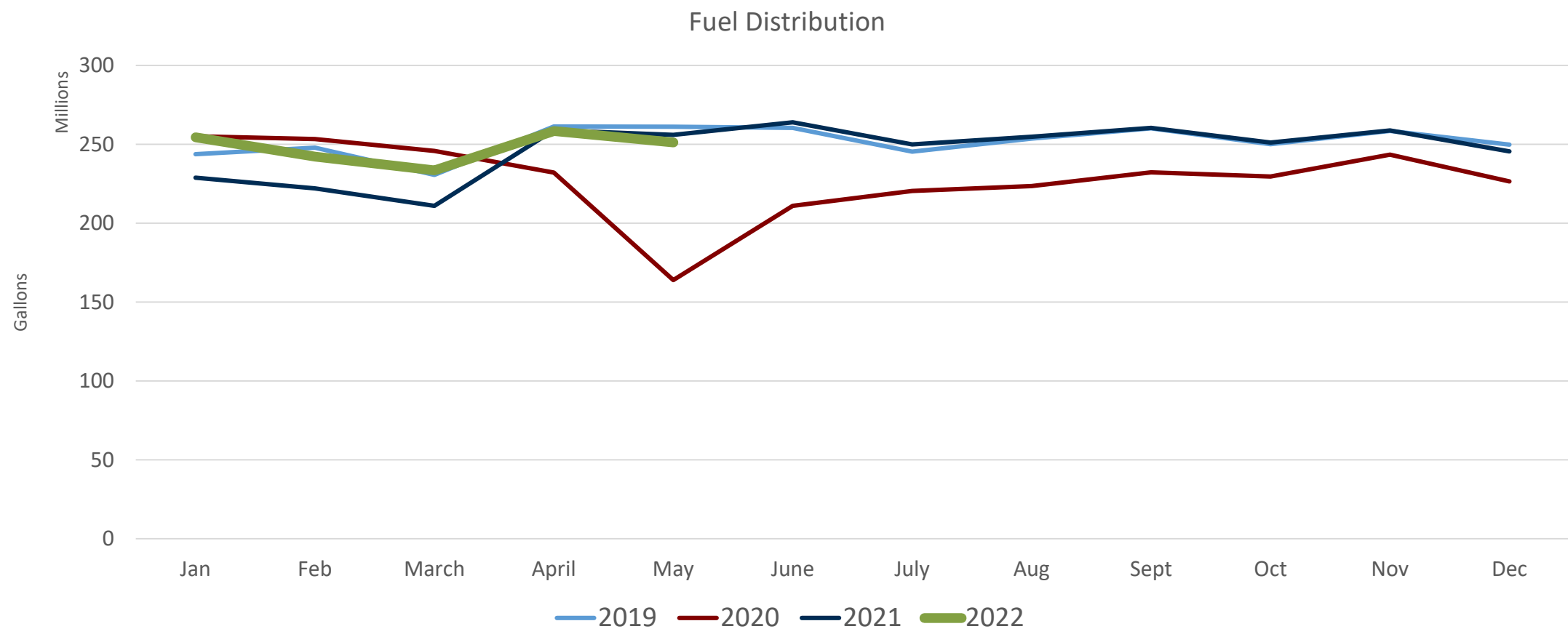
# Transportation Costs



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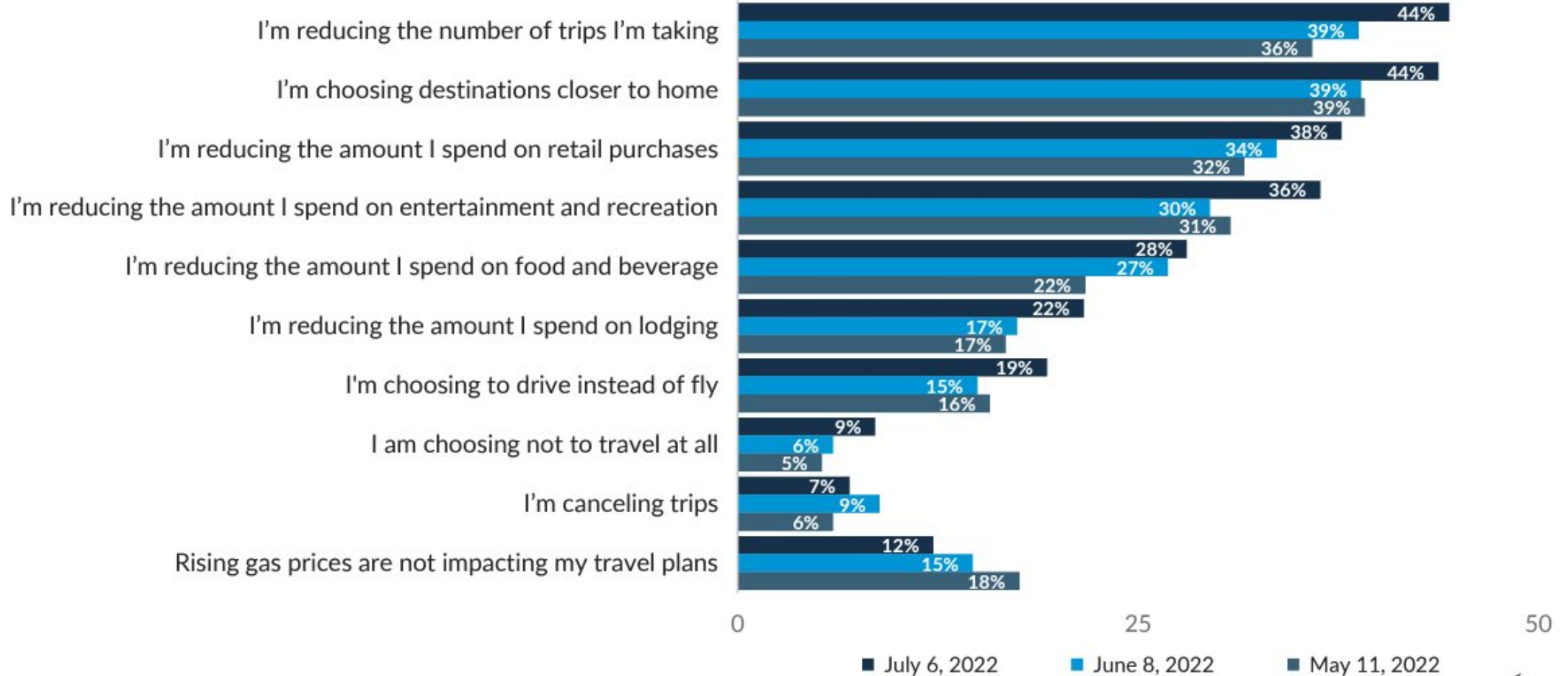


Source: Arizona Department of Transportation



## IMPACT ON TRAVEL PLANS

### Impact of Rising Gas Prices on Travel Plans

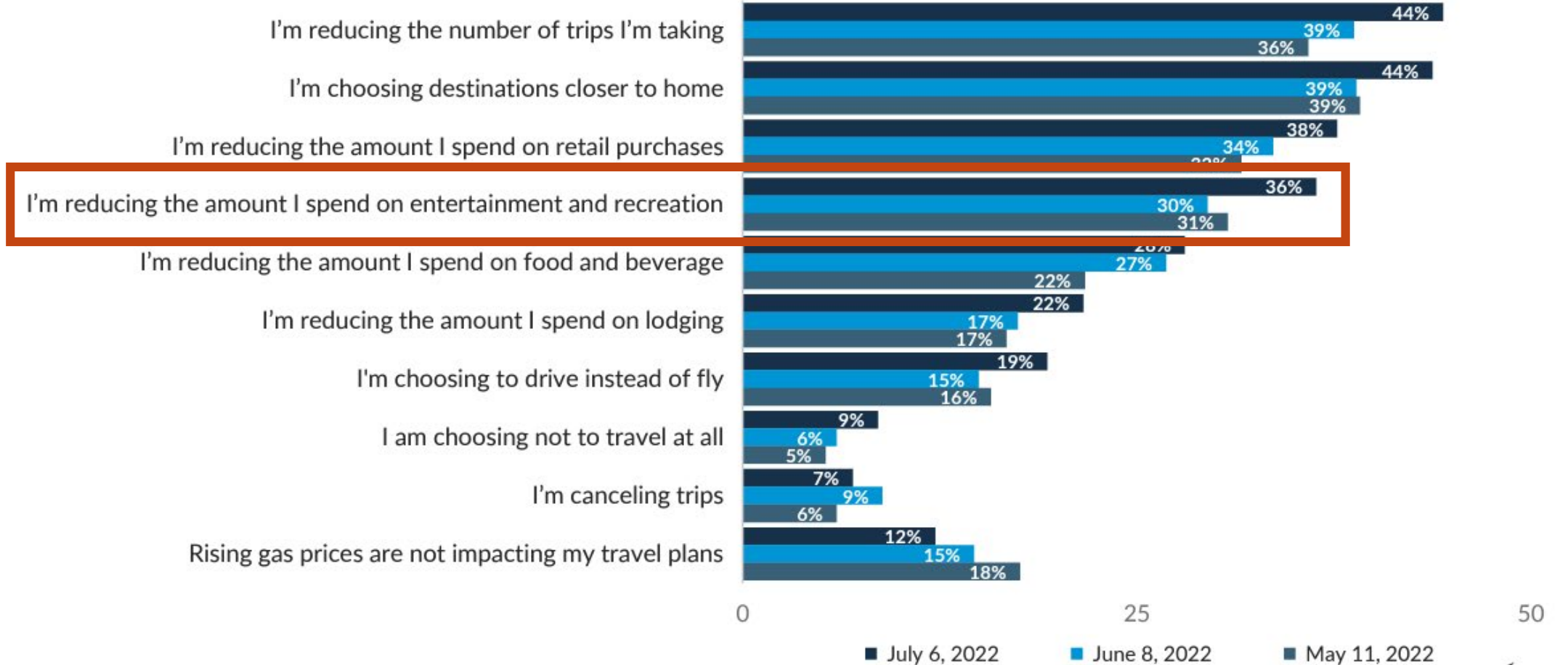


Travel Sentiment Study Wave 63

Source: Longwoods International

## IMPACT ON TRAVEL PLANS

### Impact of Rising Gas Prices on Travel Plans

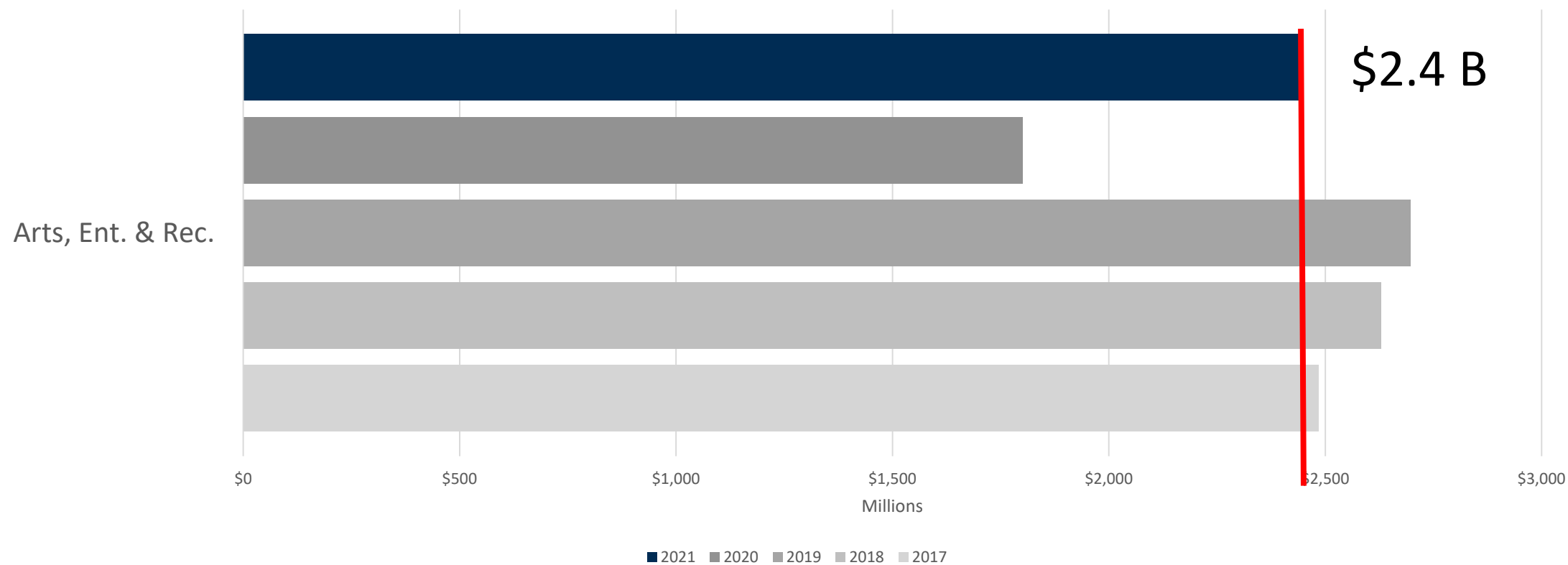


Travel Sentiment Study Wave 63

Source: Longwoods International

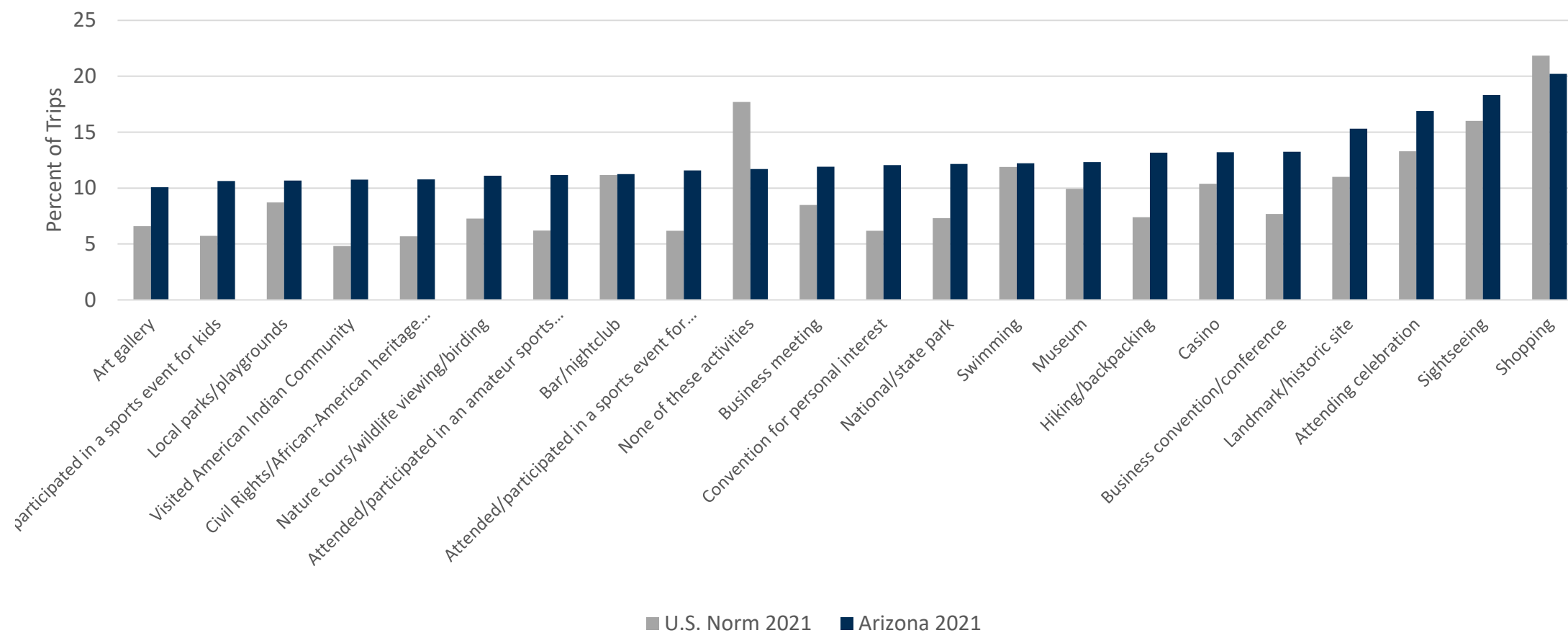
# Recovery by Sector

Spend by Commodity Purchased



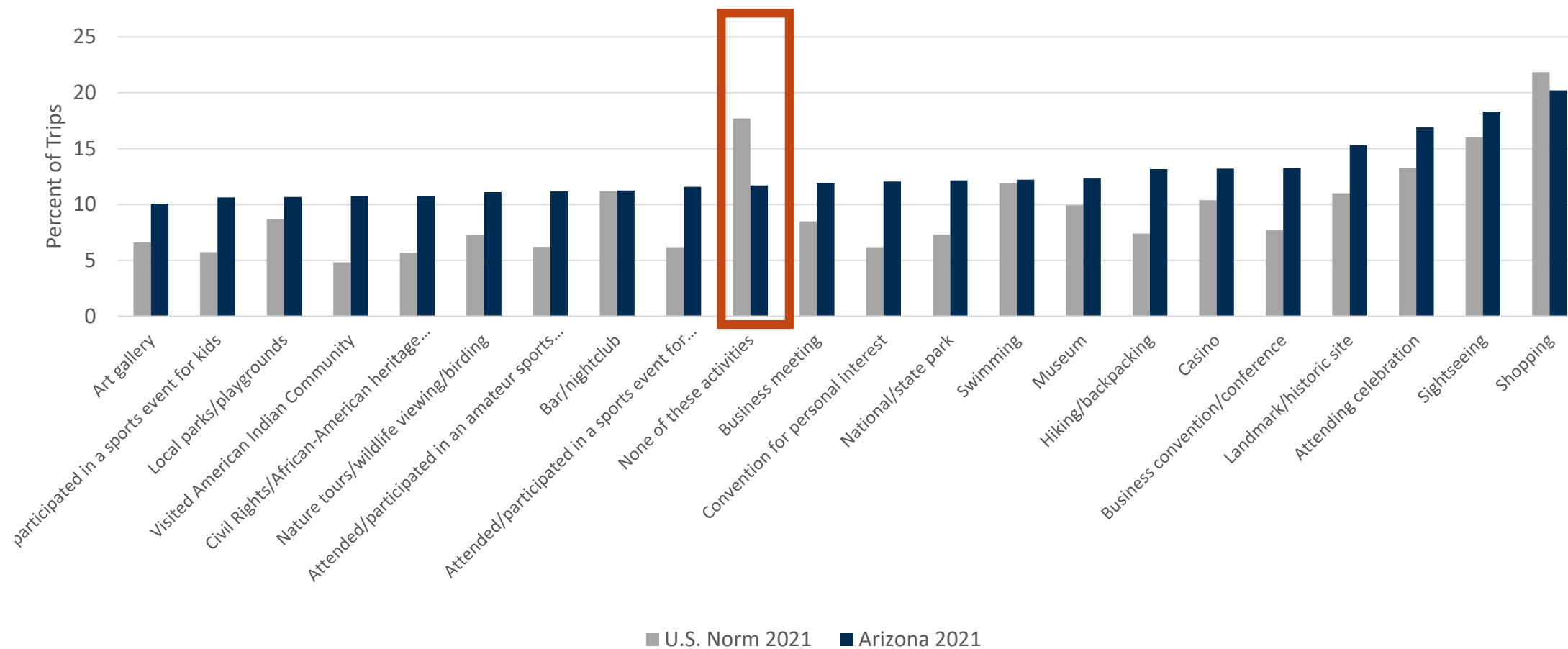
Source: Dean Runyan Associates

# Activities on AZ Trips



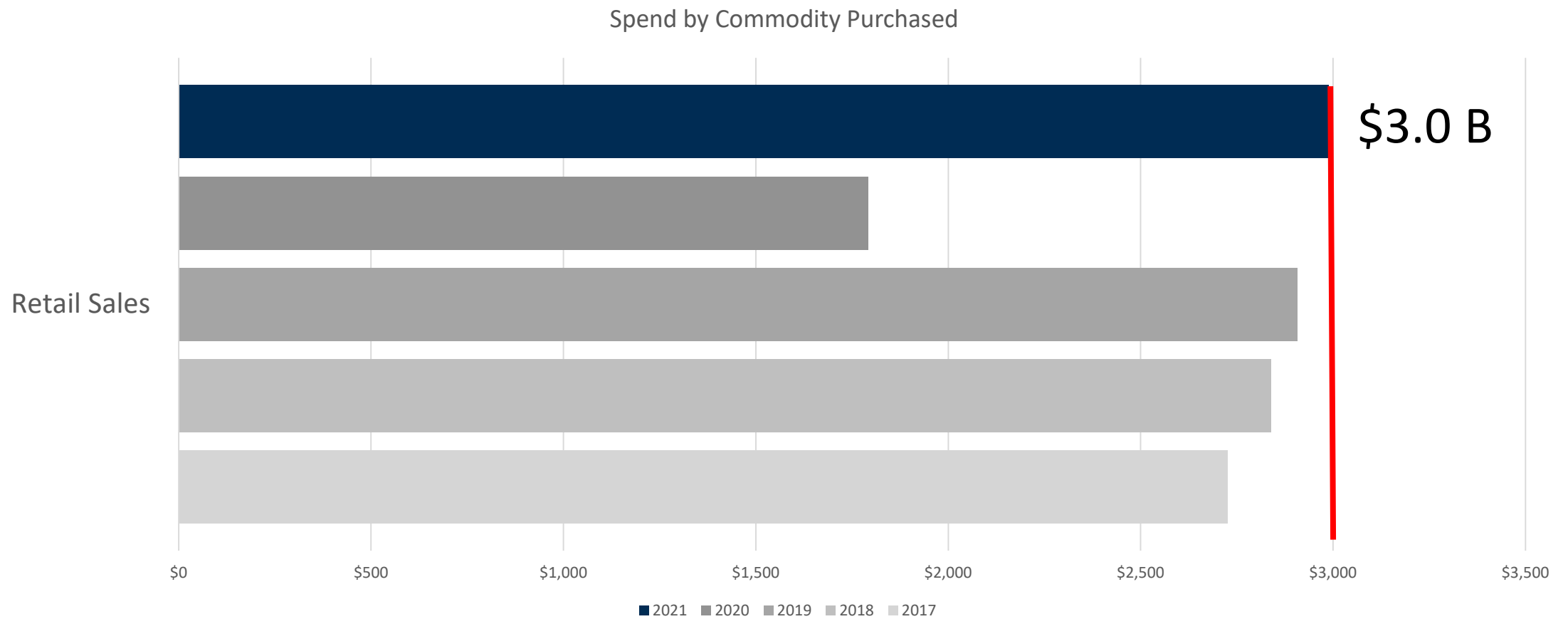
Source: Longwoods International

# Activities on AZ Trips



Source: Longwoods International

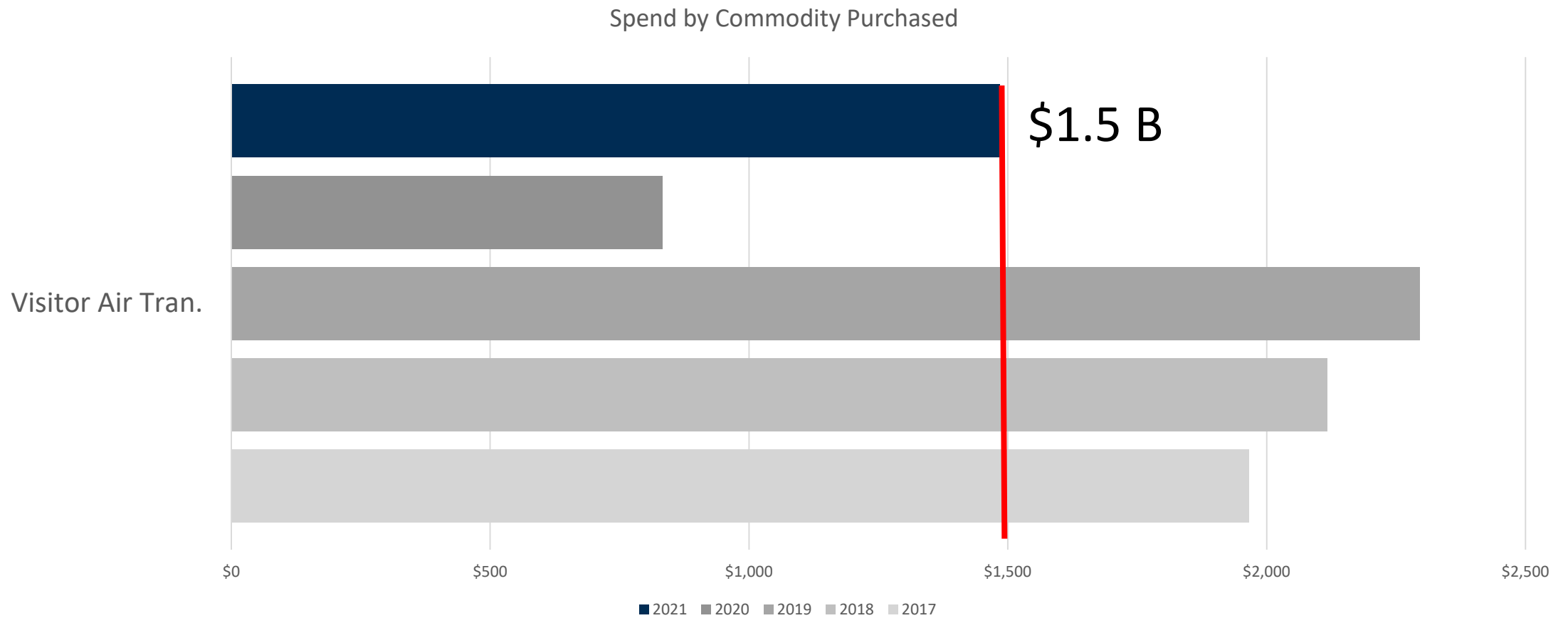
# Recovery by Sector



Source: Dean Runyan Associates

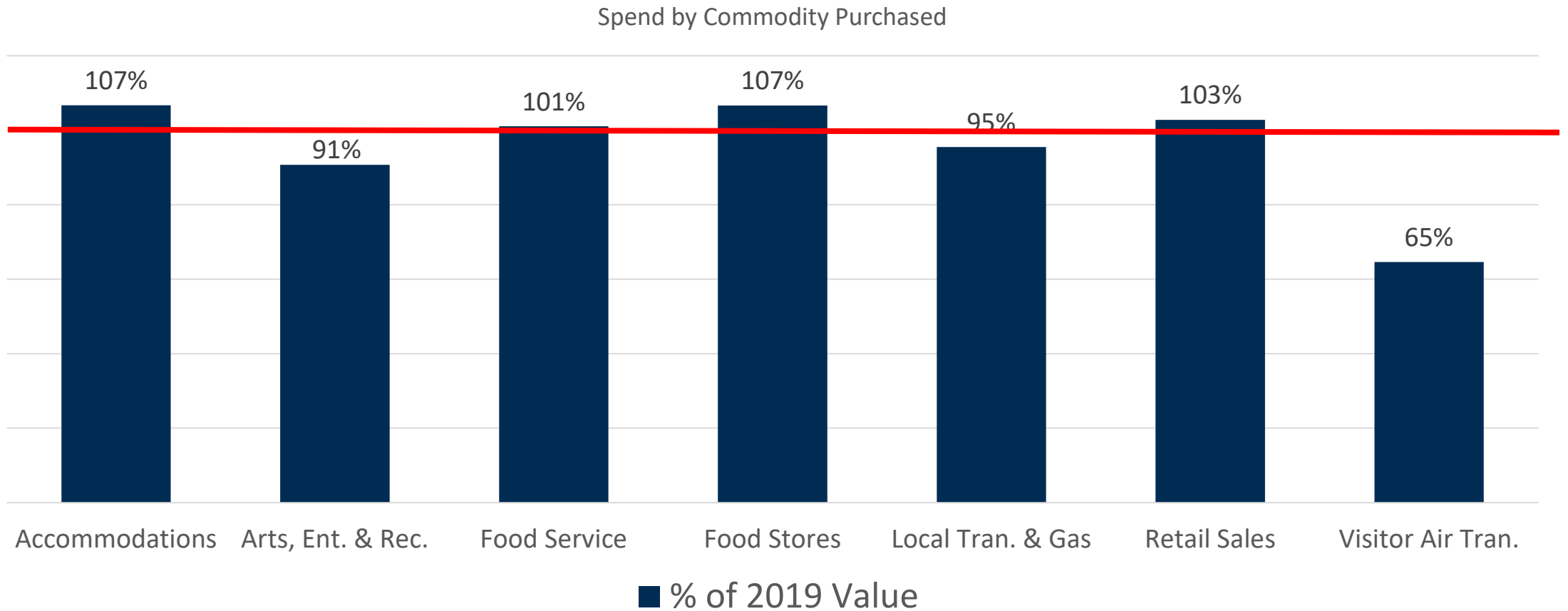


# Recovery by Sector



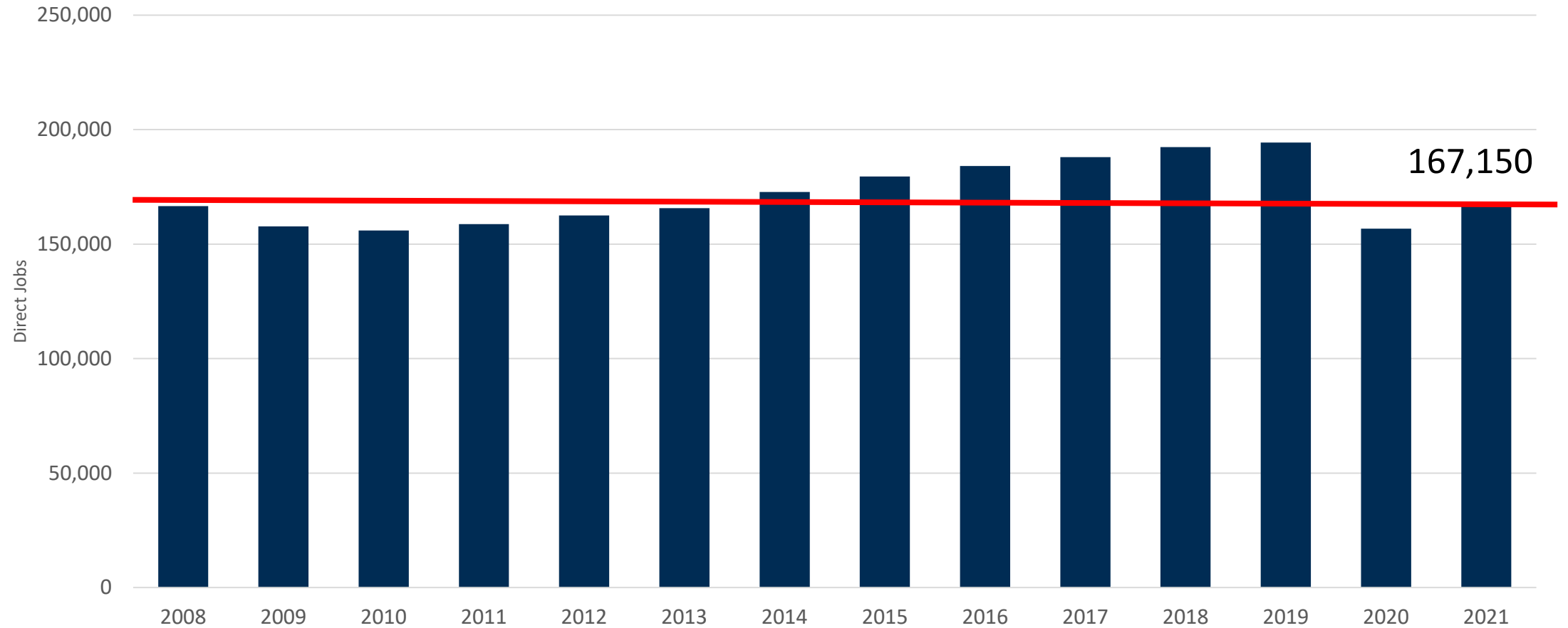
Source: Dean Runyan Associates

# Recovery by Sector



Source: Dean Runyan Associates

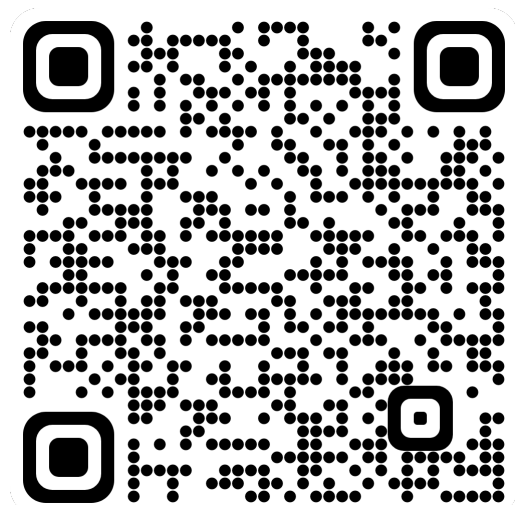
# Employment



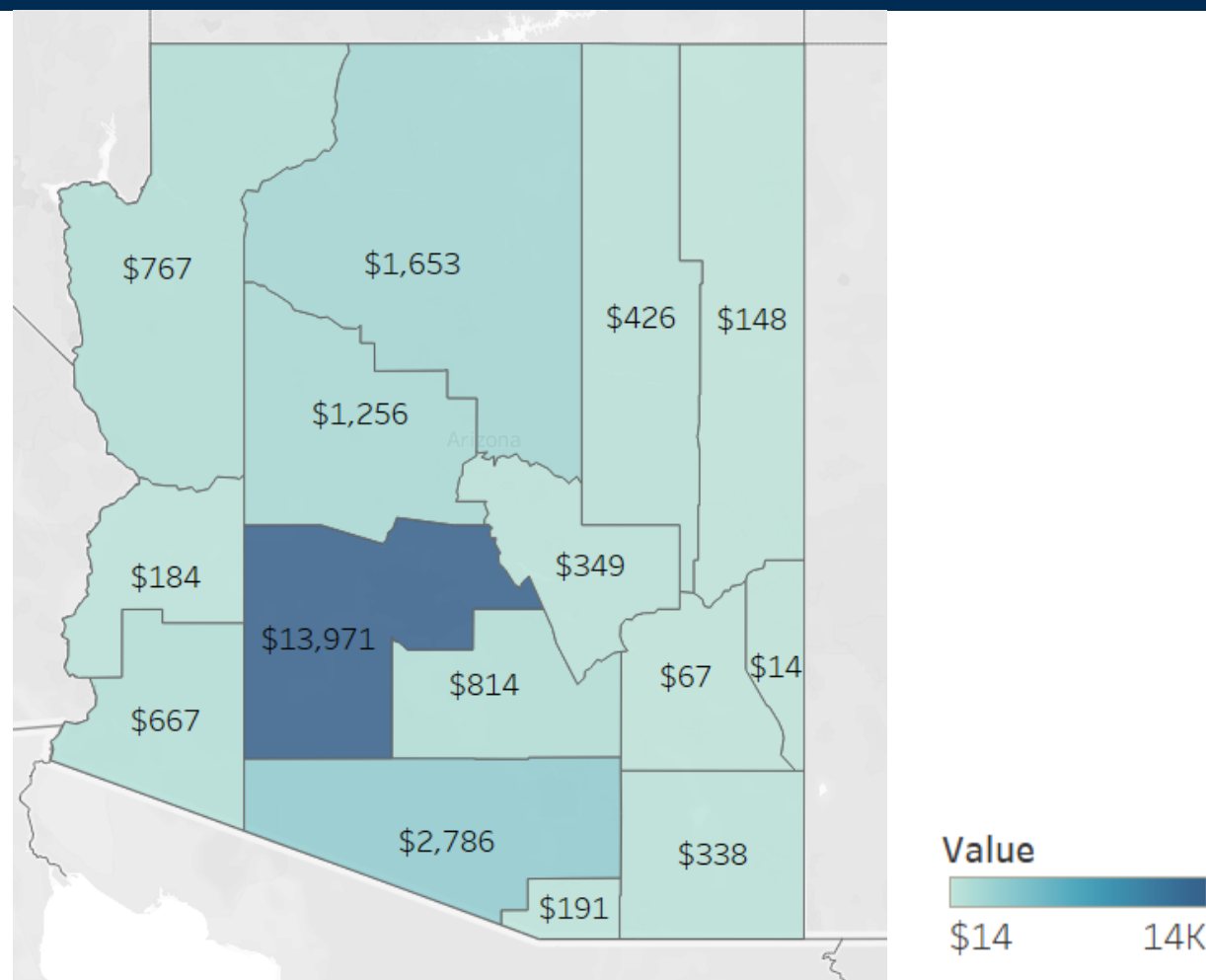
Source: Dean Runyan Associates

# Direct Spending, 2021p (millions)

## Full Economic Impact Report

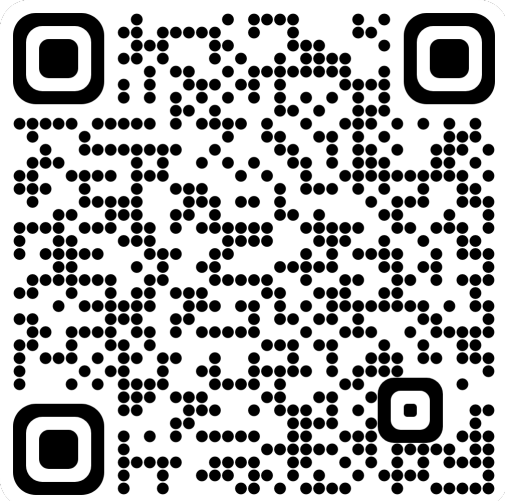


Source: Dean Runyan Associates

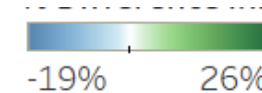
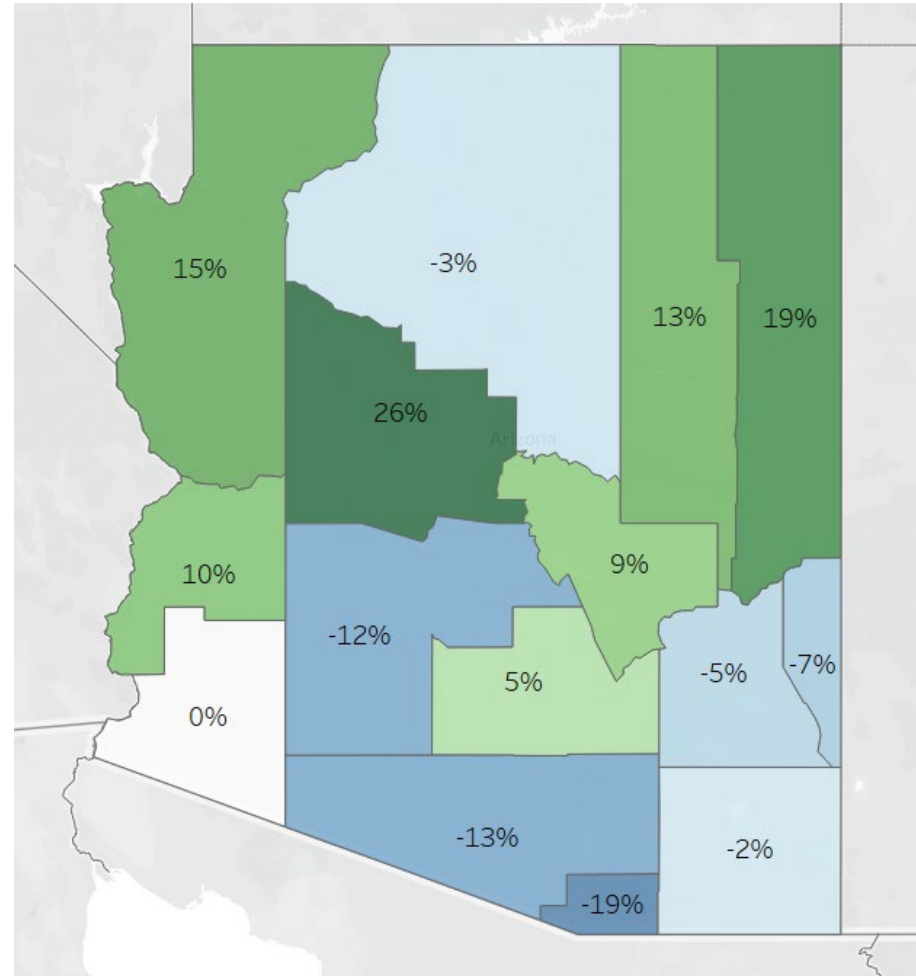


# Direct Spending, 2021p compared to 2019

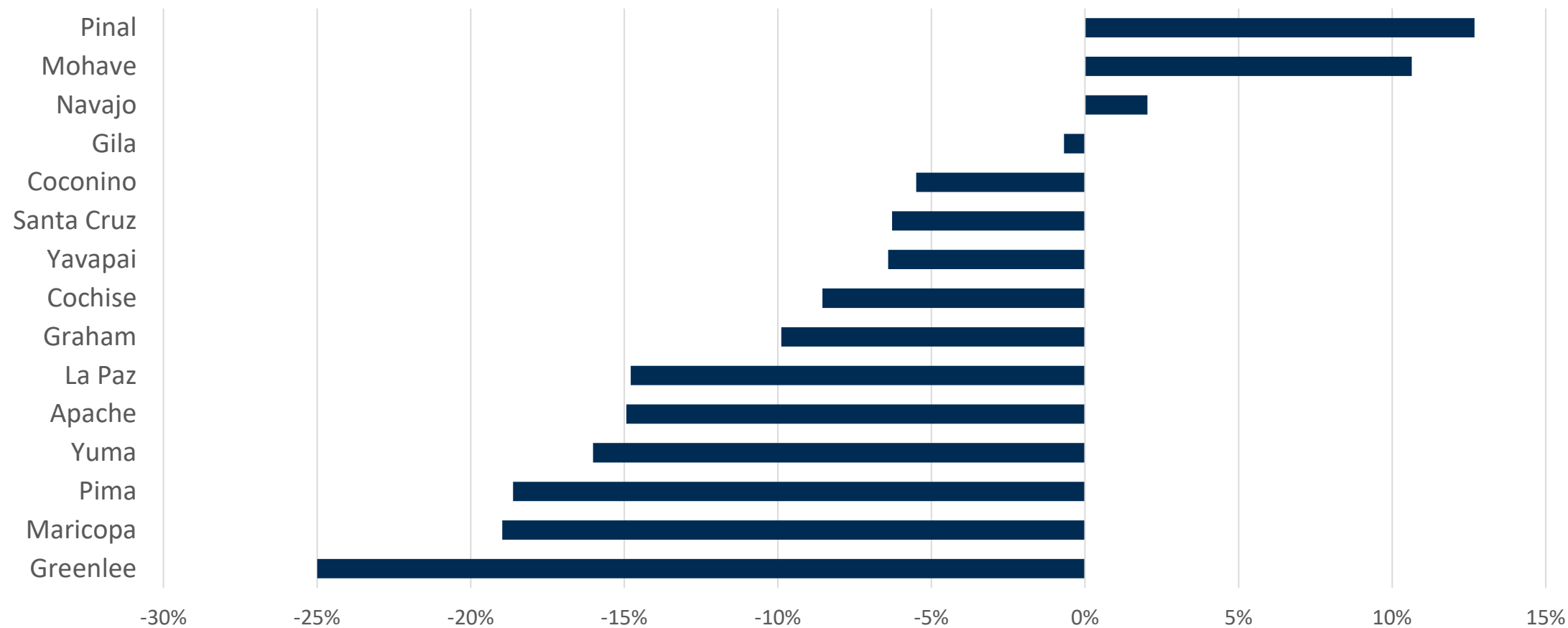
## Full Economic Impact Report



Source: Dean Runyan Associates



# Employment % change vs. 2019

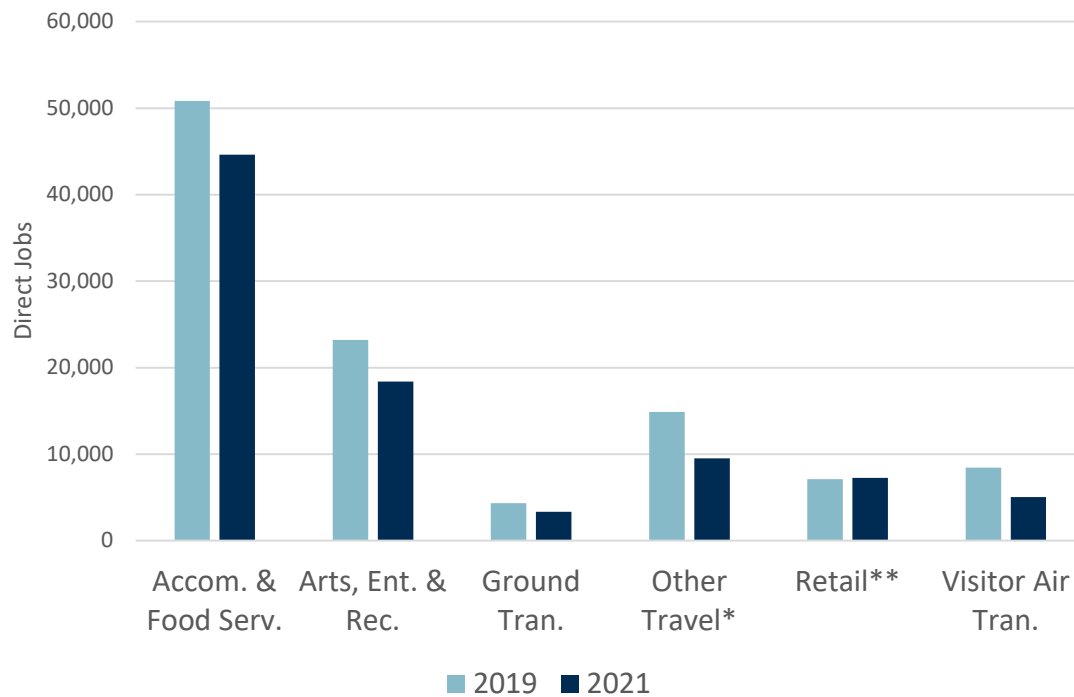


Source: Dean Runyan Associates

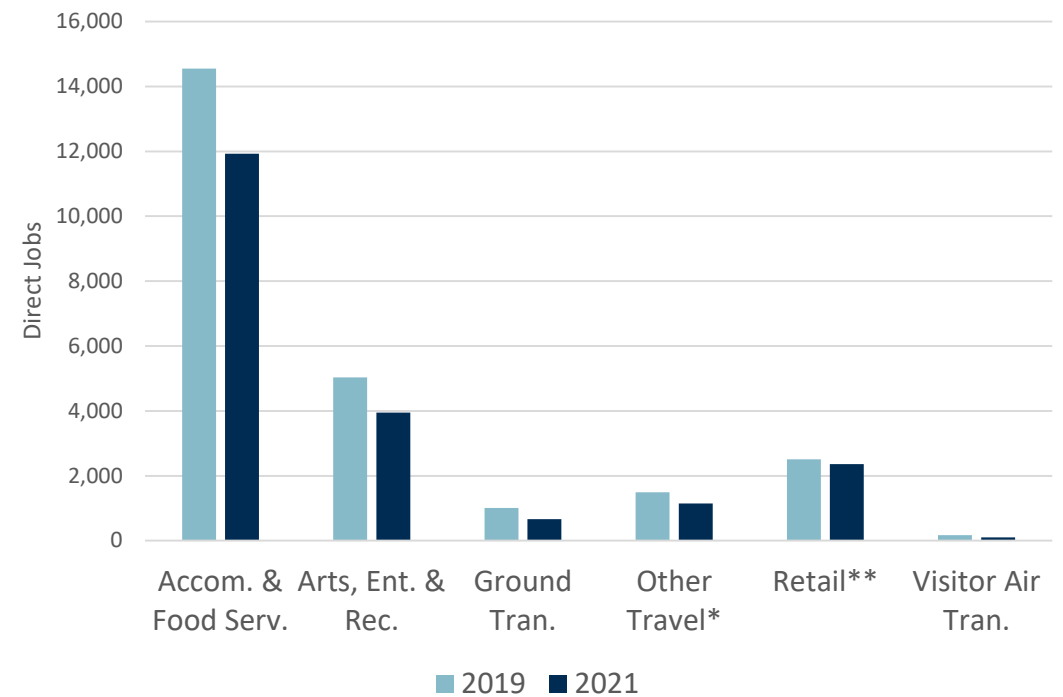


# Employment

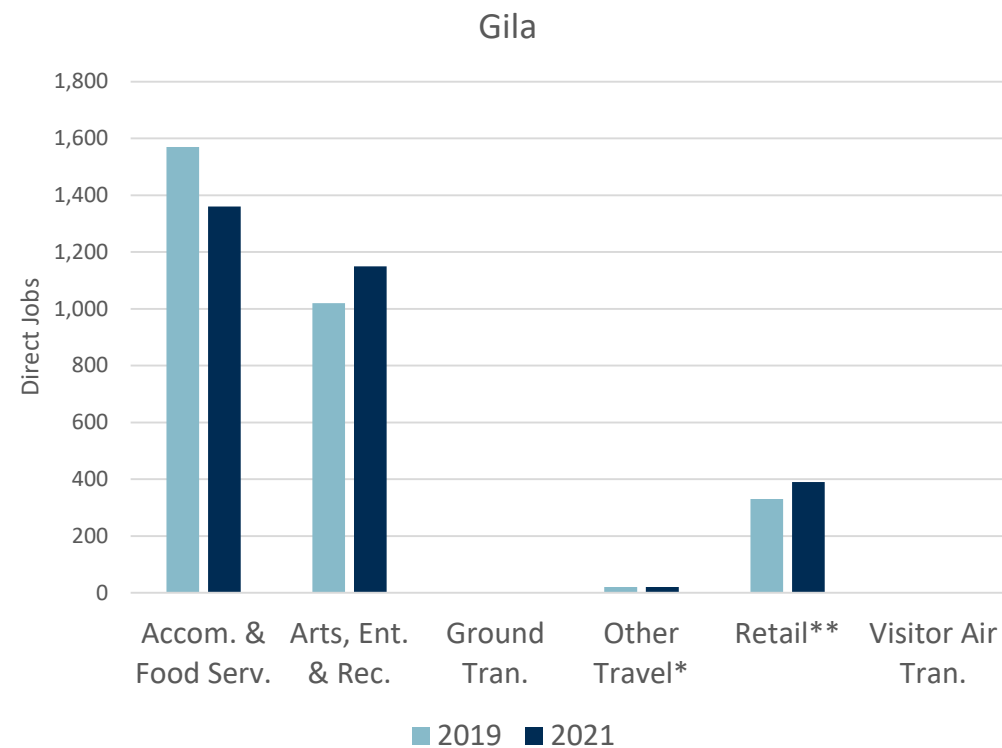
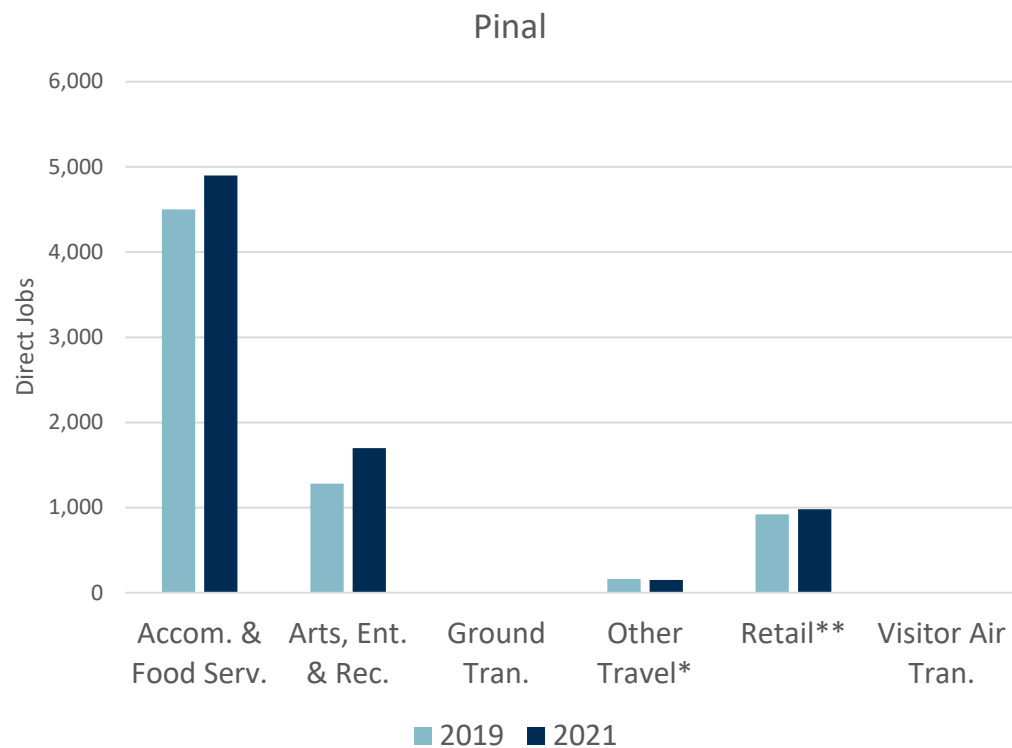
Maricopa



Pima

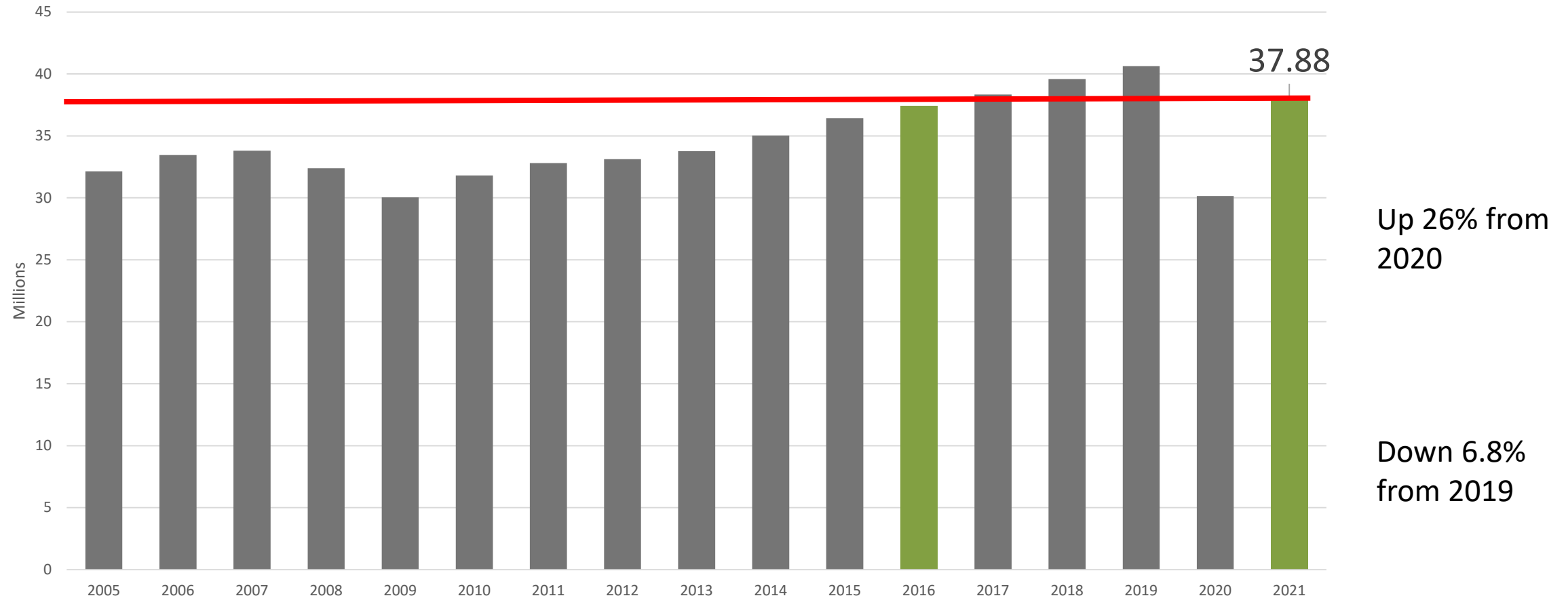


# Employment



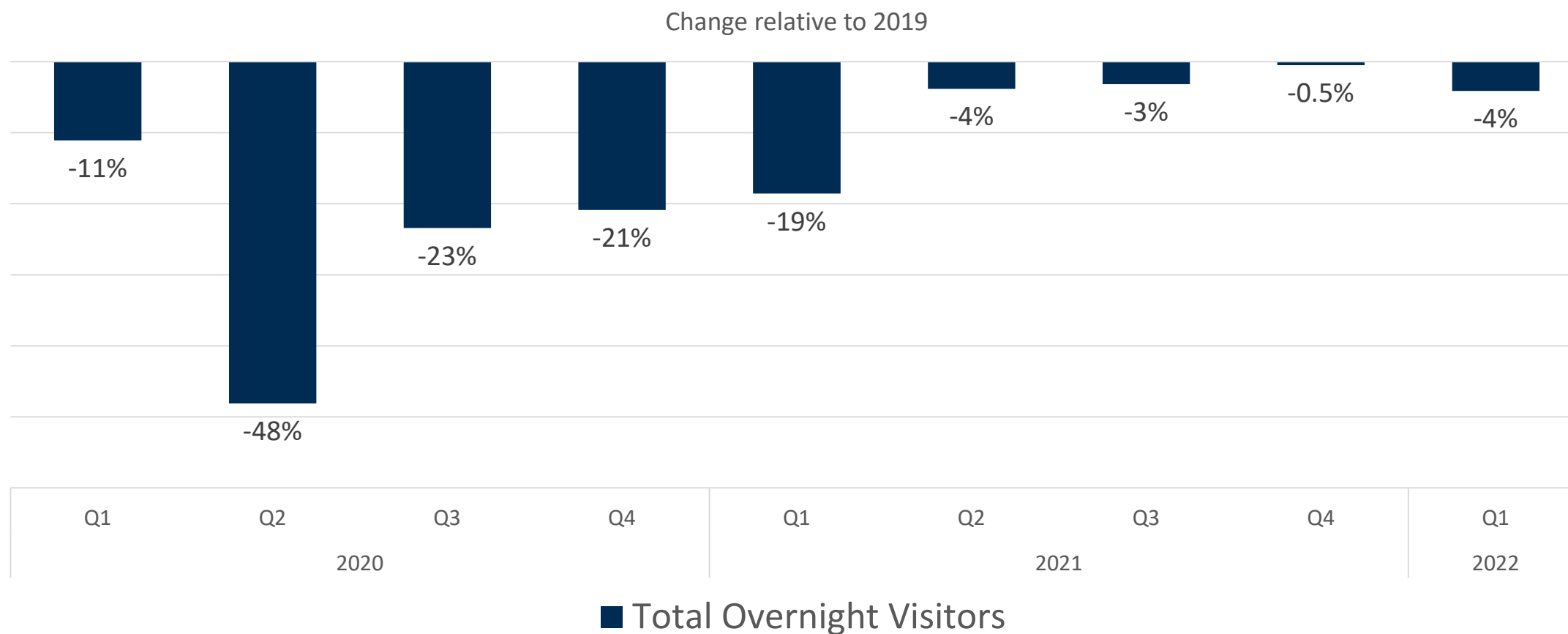
# Visitation

# Domestic Overnight Visitation to Arizona



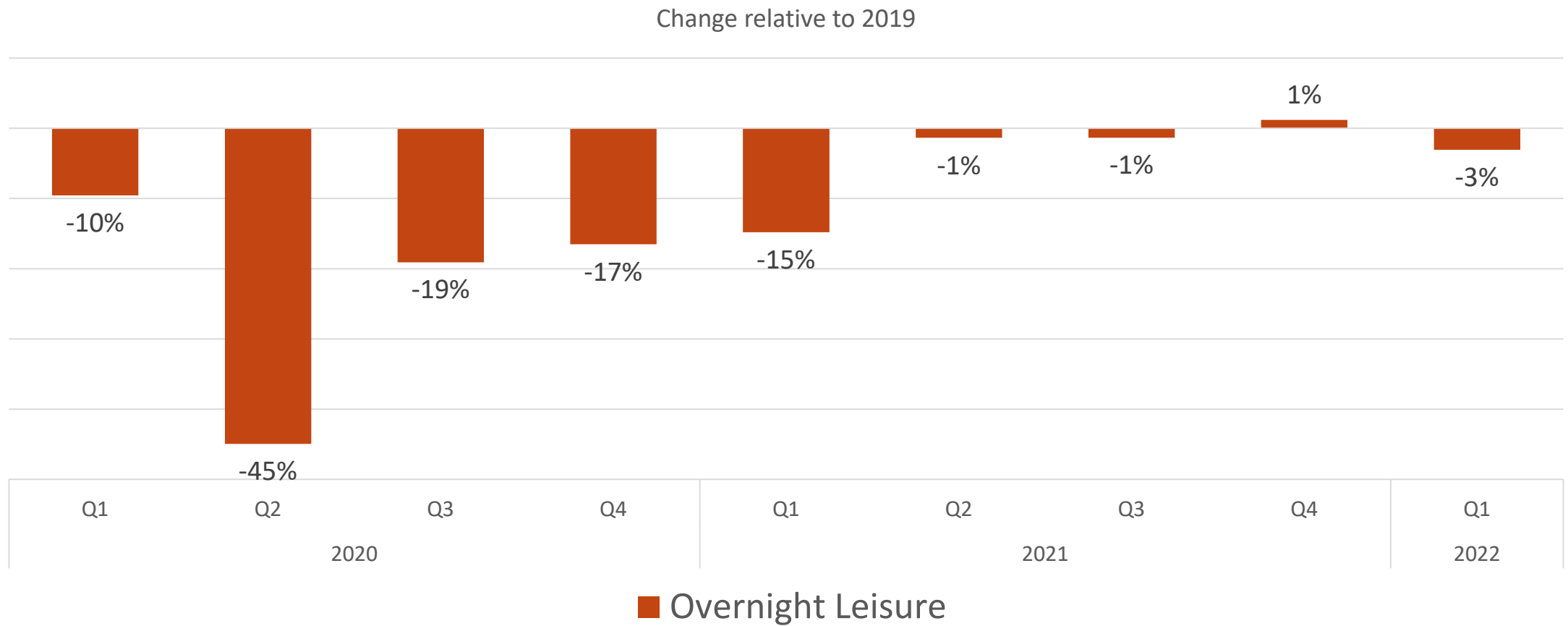
Source: Tourism Economics, 2021

# Domestic Overnight Visitation to Arizona



Source: Tourism Economics, 2021

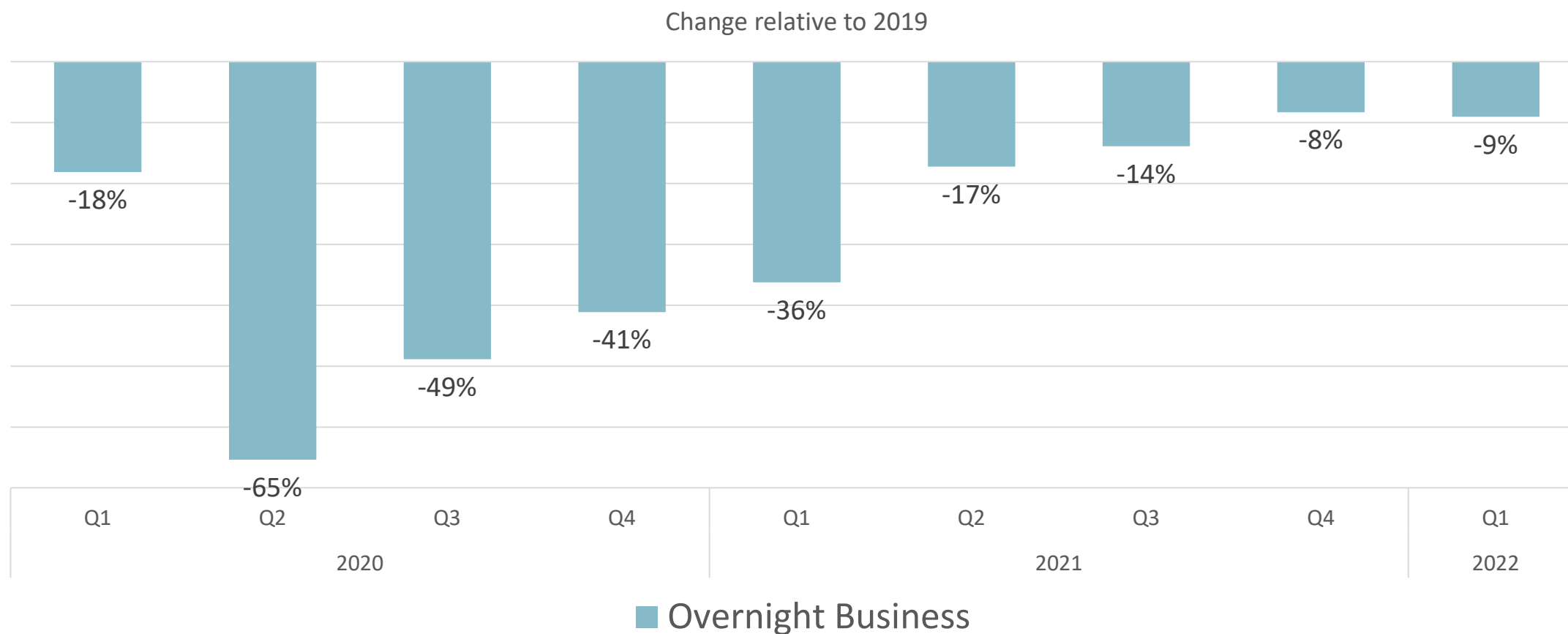
# Domestic Overnight Visitation to Arizona



Source: Tourism Economics, 2021

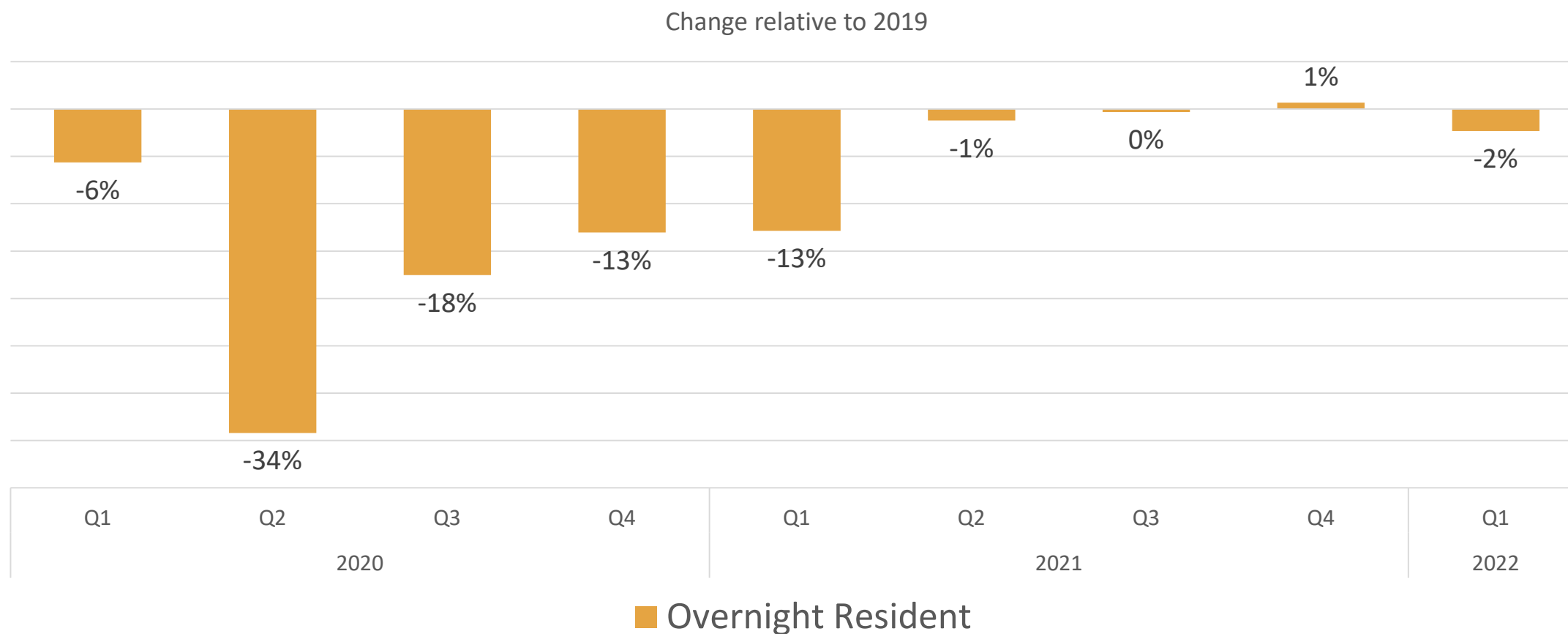


# Domestic Overnight Visitation to Arizona



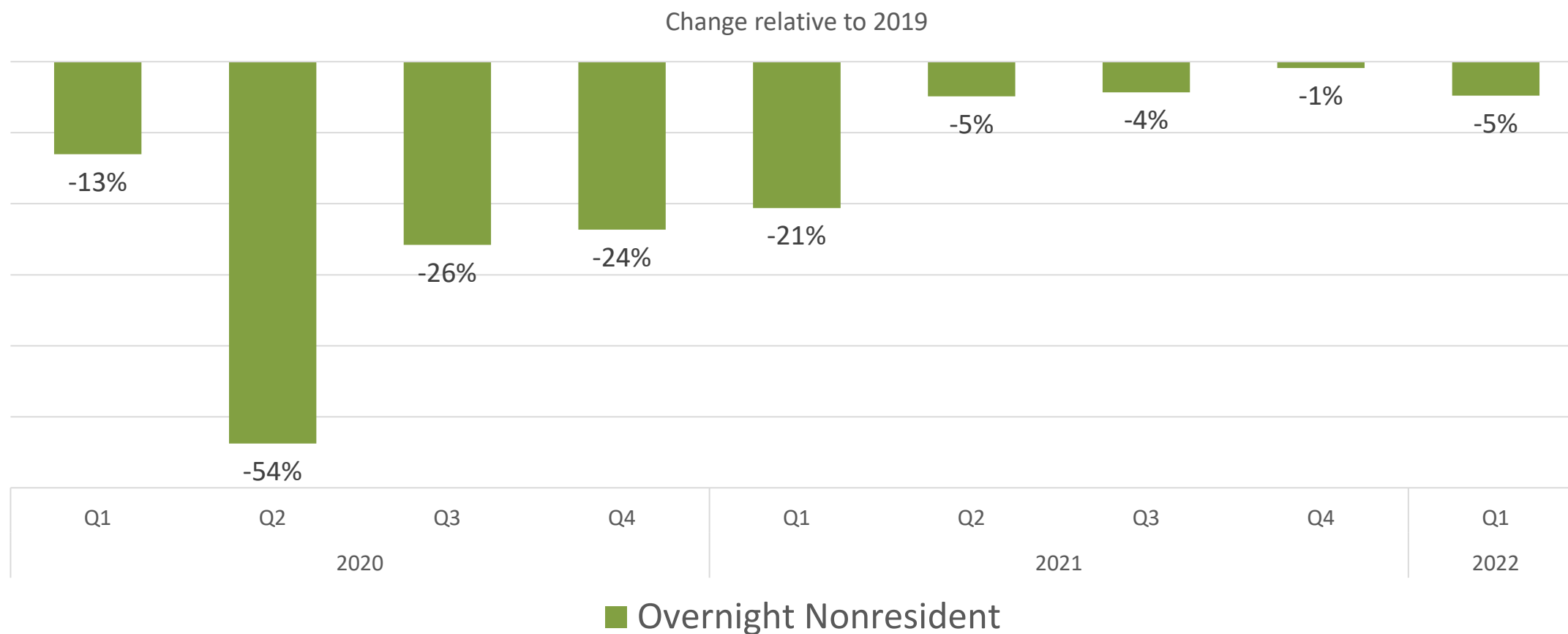
Source: Tourism Economics, Q1 2022

# Domestic Overnight Visitation to Arizona

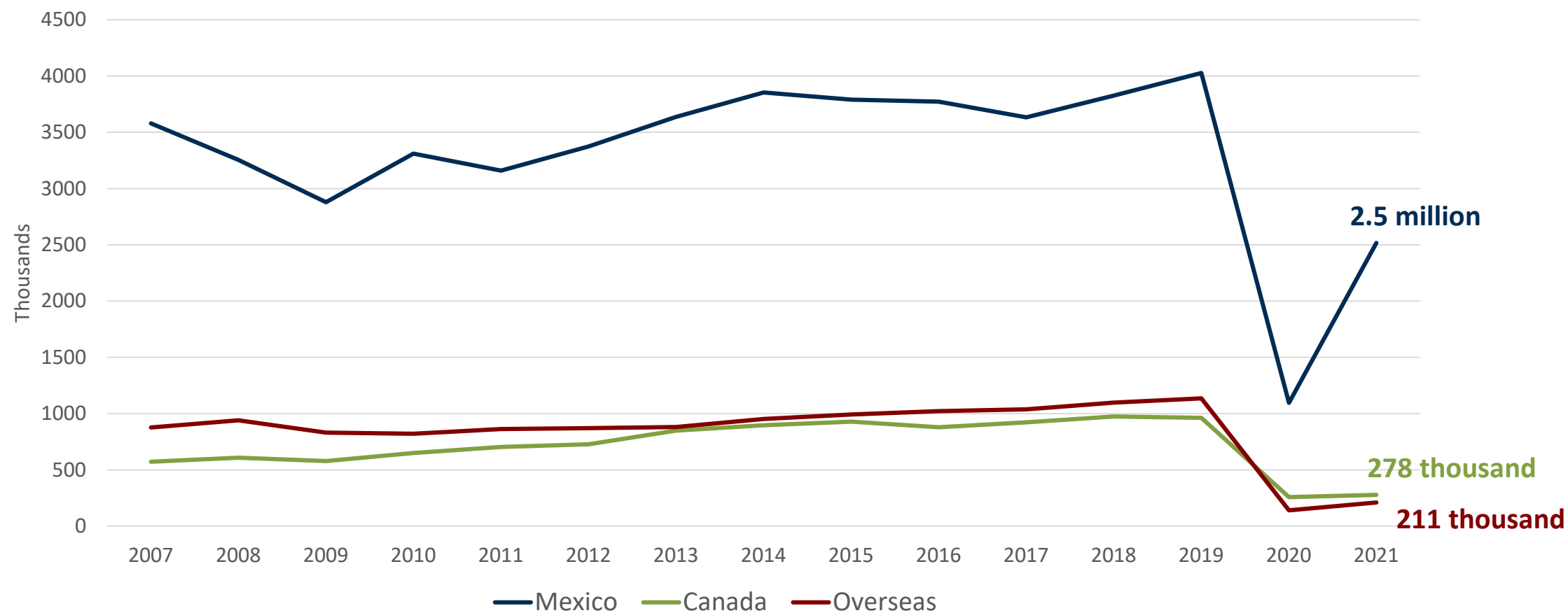


Source: Tourism Economics, Q1 2022

# Domestic Overnight Visitation to Arizona

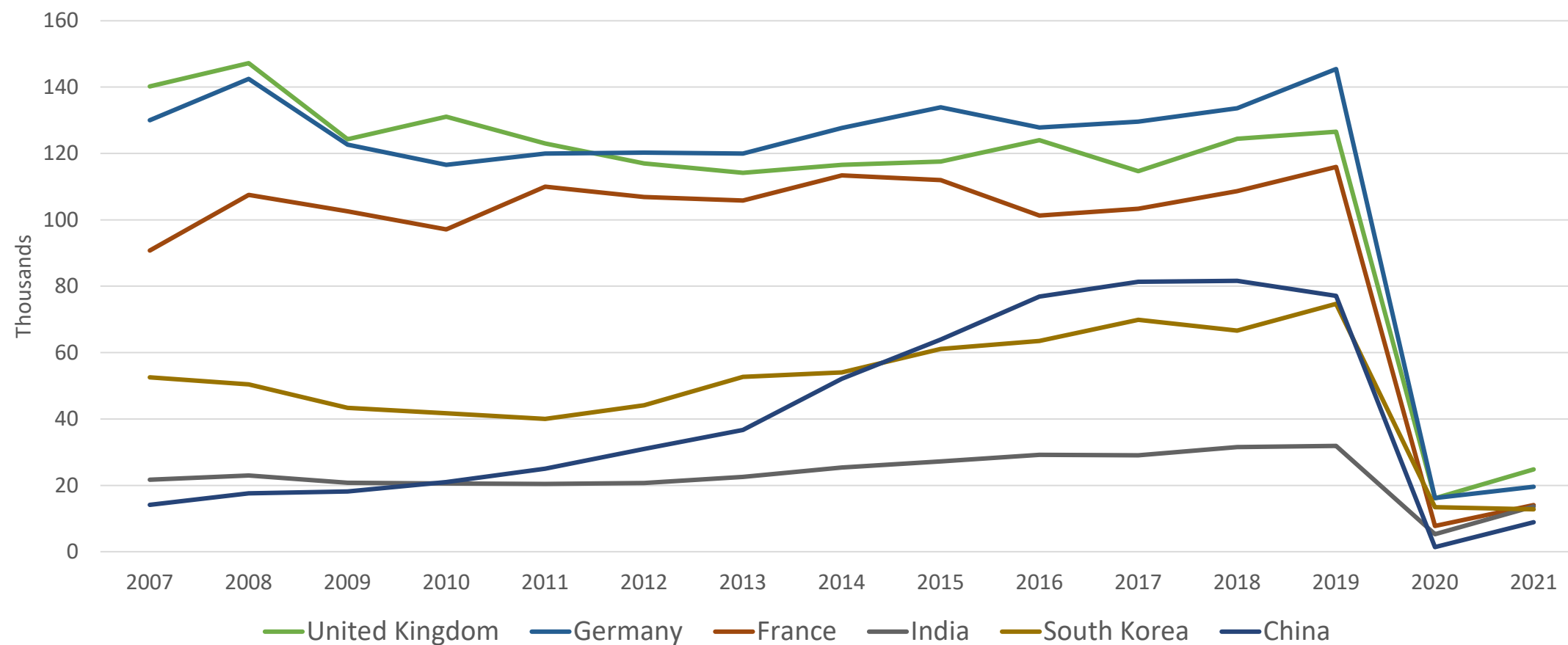


# International Overnight Visitation to Arizona



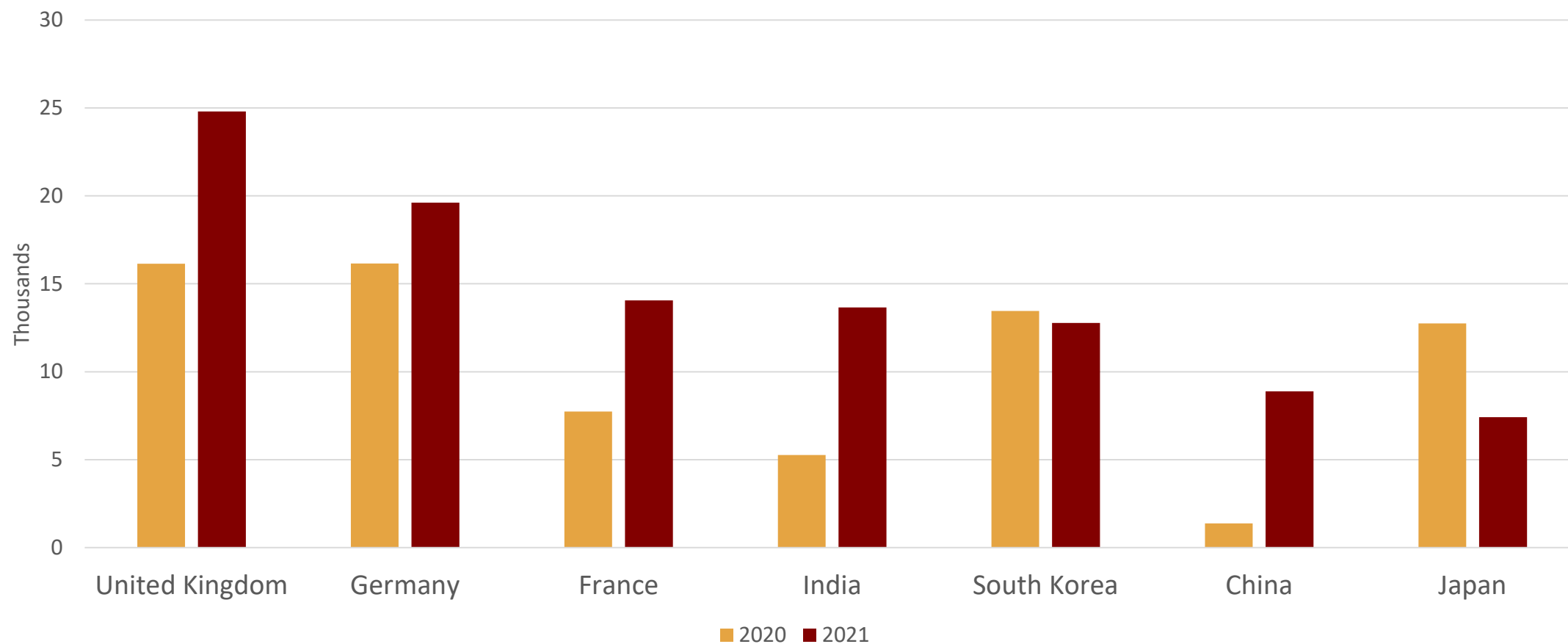
Source: Tourism Economics, 2021

# International Overnight Visitation to Arizona



Source: Tourism Economics, 2021

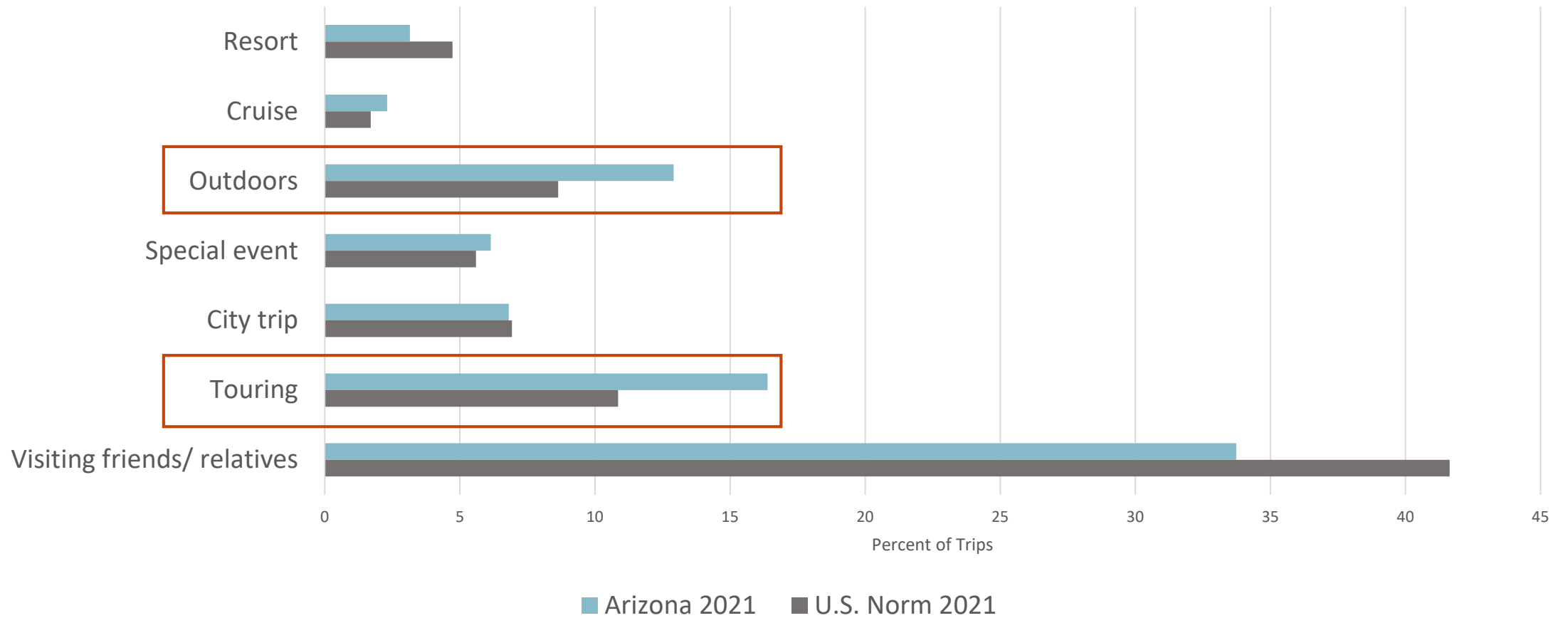
# International Overnight Visitation to Arizona



Source: Tourism Economics, 2021

# Arizona Visitor Profile

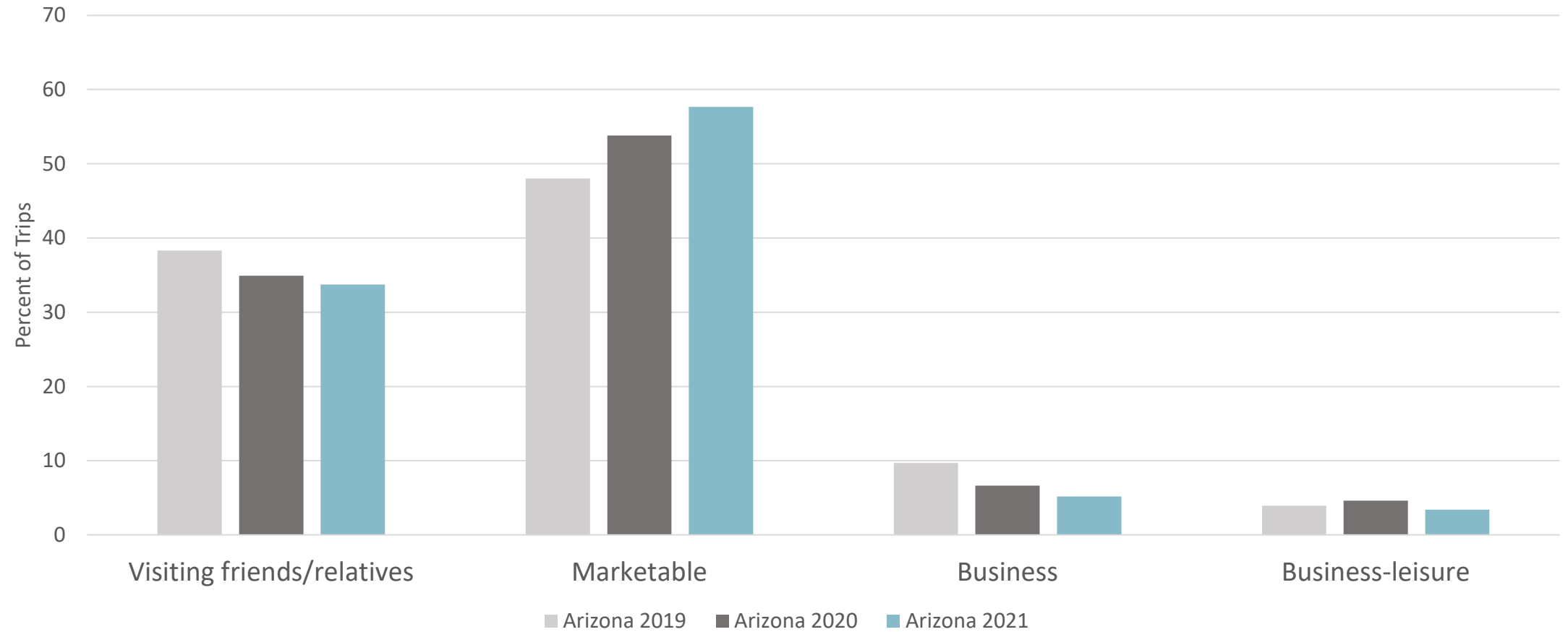
# Main Purpose of Trip



Source: Longwoods International, 2021

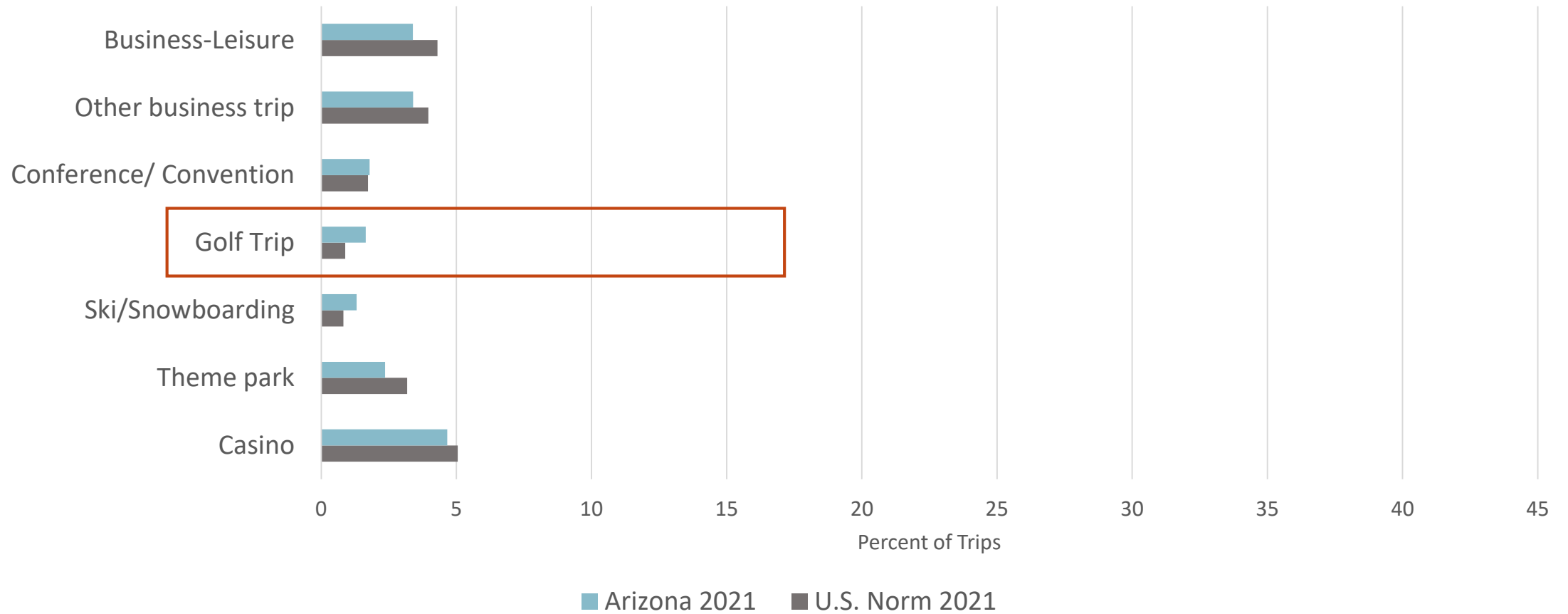


# Trip Segment

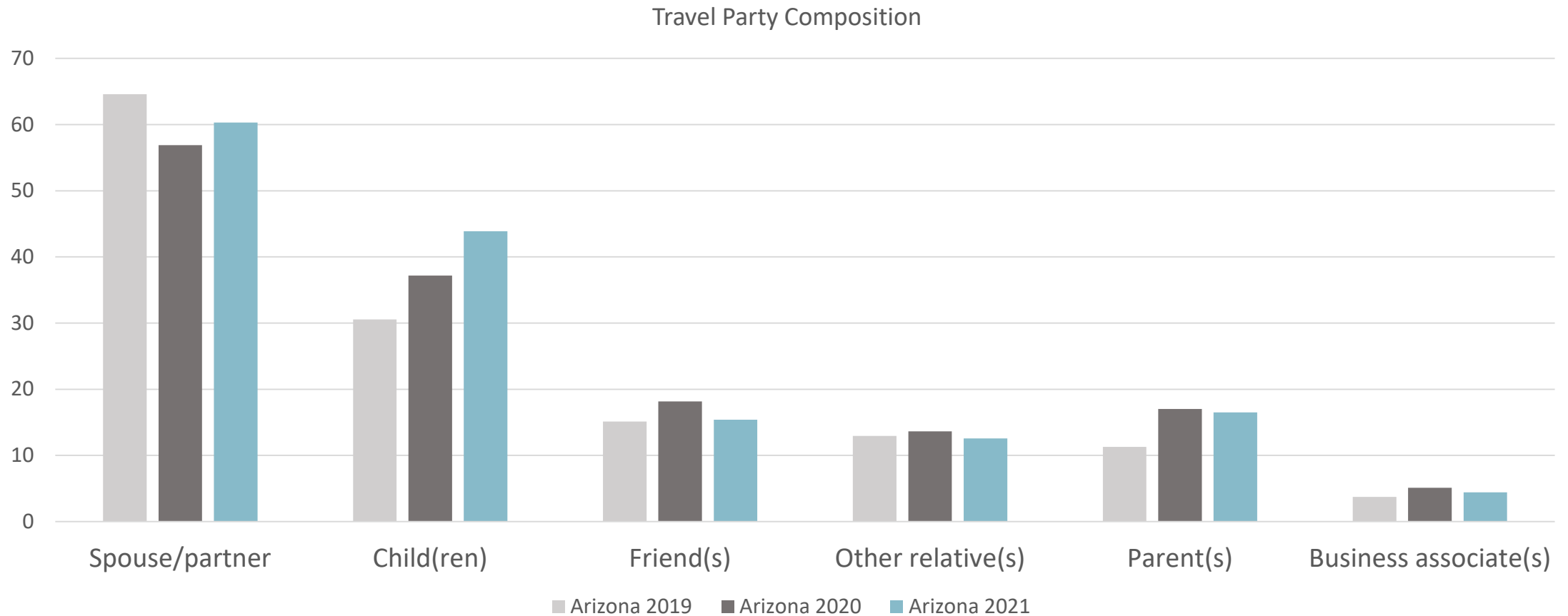


Source: Longwoods International

# Main Purpose of Trip - continued

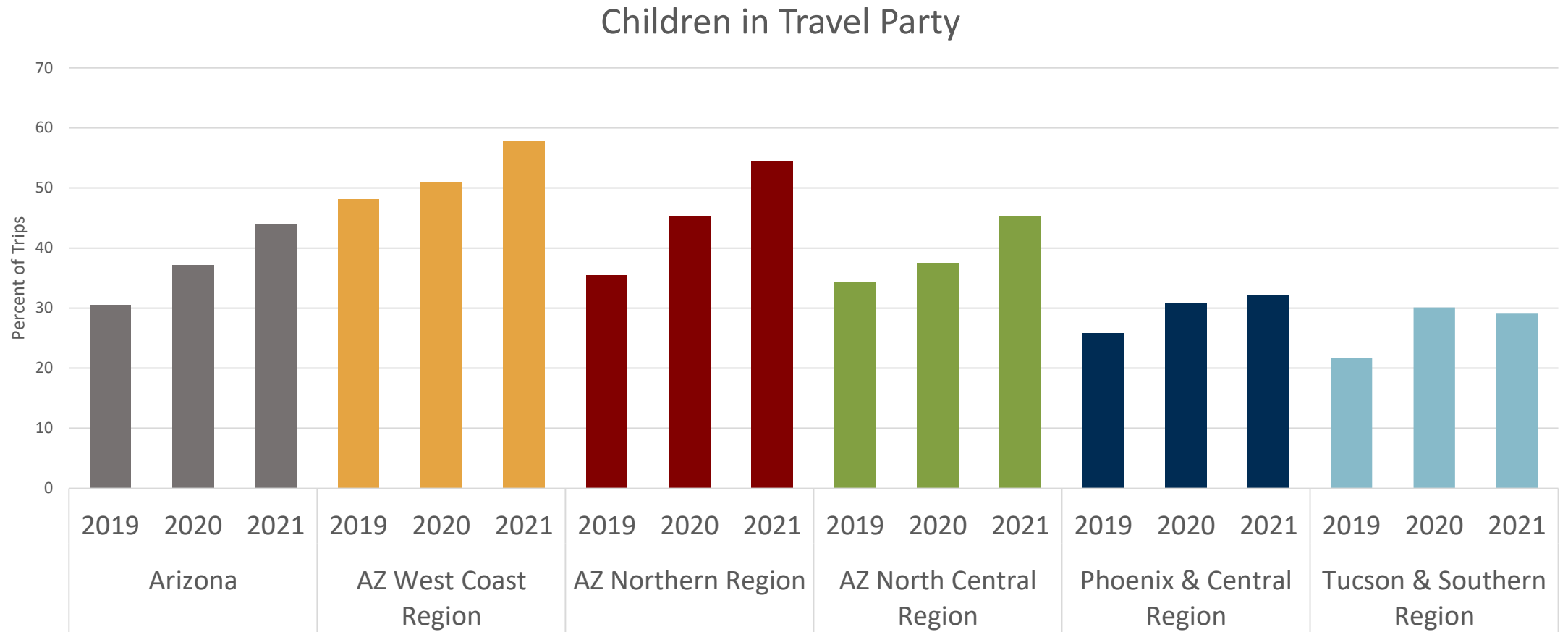


# Travel Party Composition



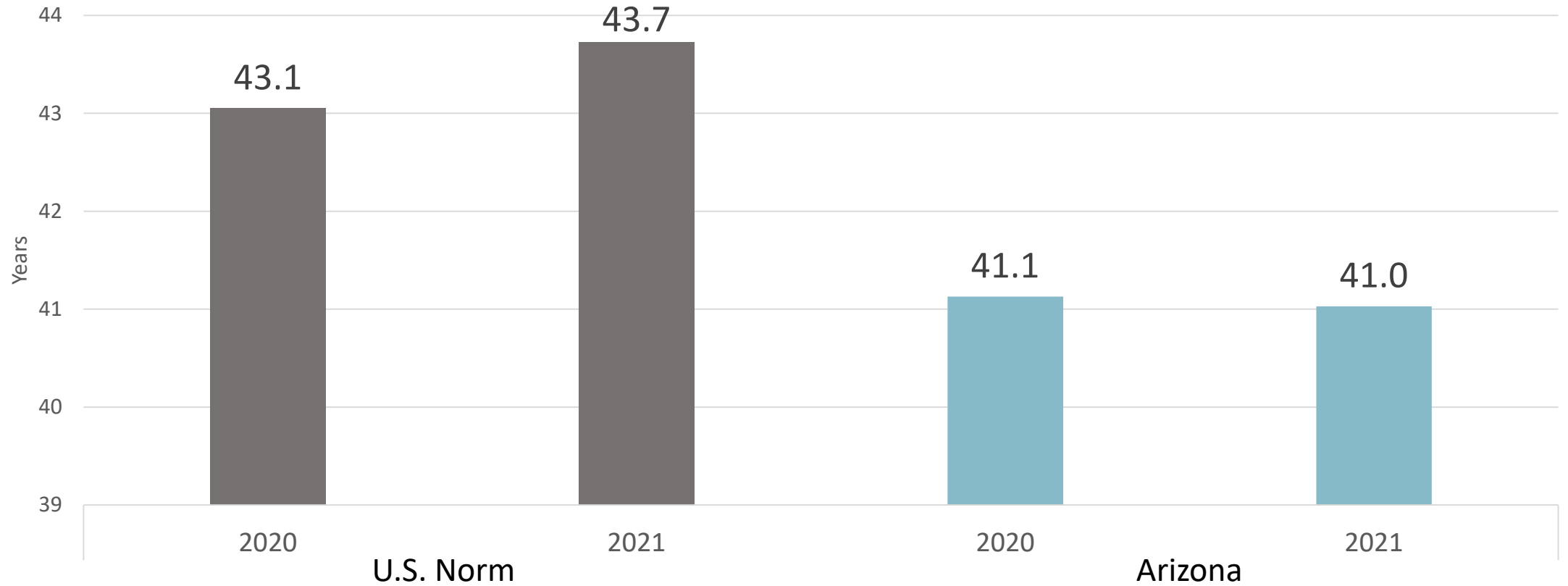
Source: Longwoods International

# Travel Party Composition



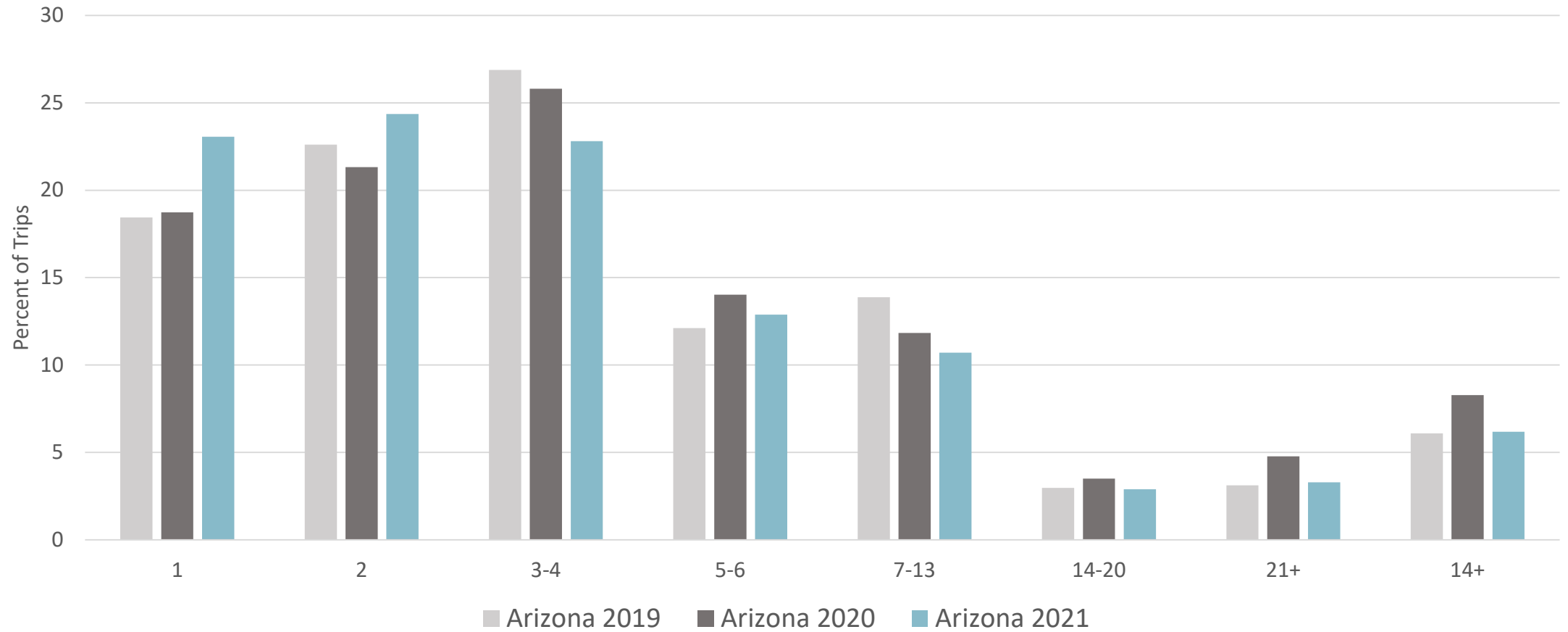
Source: Longwoods International

# Average Age



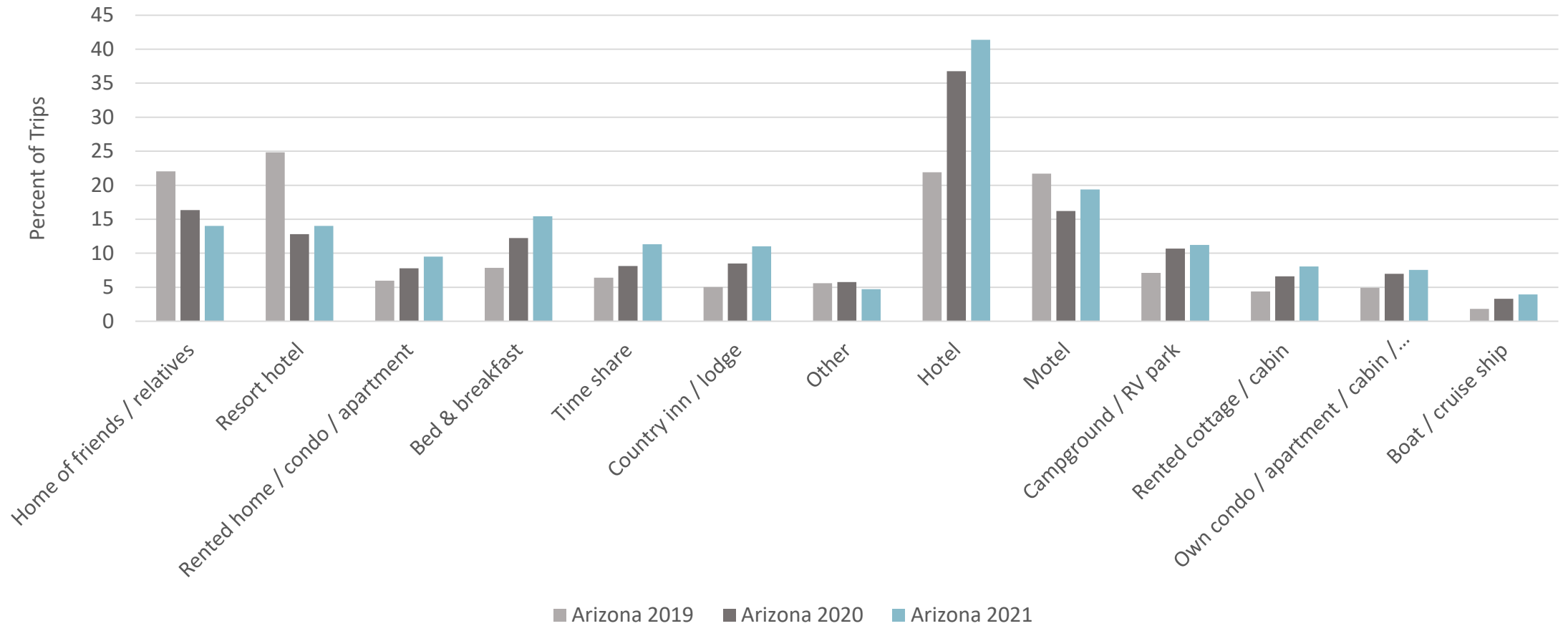
Source: Longwoods International

# Total Nights Away



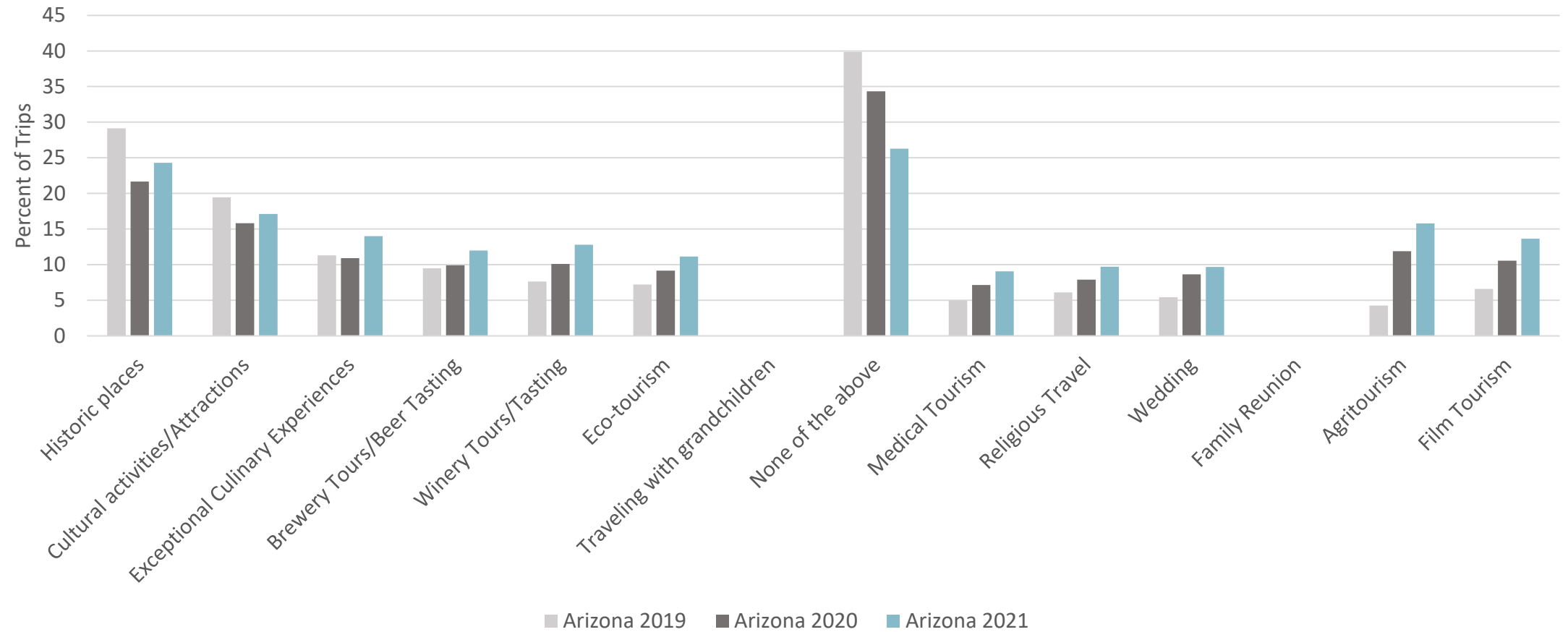
Source: Longwoods International

# Accommodation



Source: Longwoods International

# Activities of Interest



Source: Longwoods International



Thank you