

TRAVEL RESEARCH TRENDS



x



OCTOBER, 2023

ARIZONA TOURISM IN 2022

40.2 MILLION

DOMESTIC OVERNIGHT VISITORS

2022 vs 2021

+6%



\$28 BILLION

TRAVEL SPENDING

2022 vs 2021

+19%



ARIZONA TOURISM IN 2022

40.2 MILLION

DOMESTIC OVERNIGHT VISITORS

2022 vs 2019

-1%



\$28 BILLION

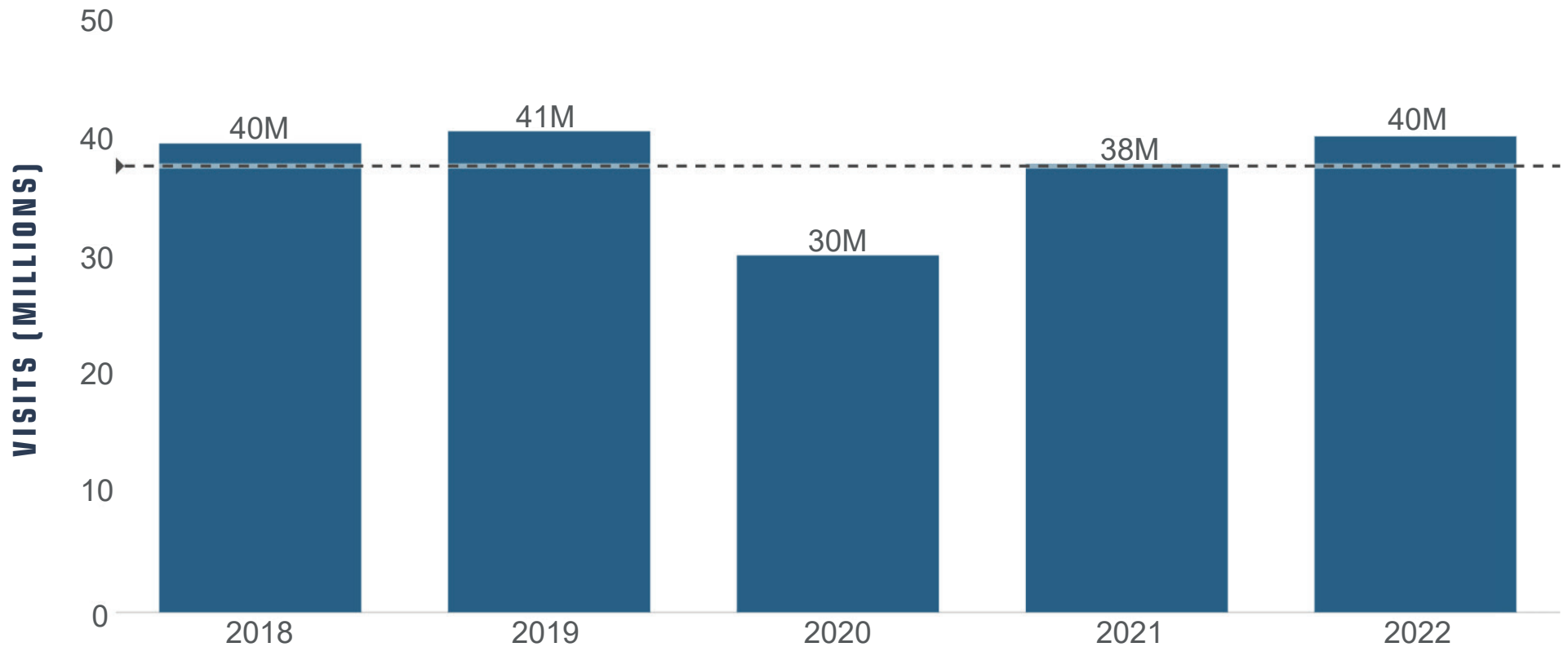
TRAVEL SPENDING

2022 vs 2019

+10%



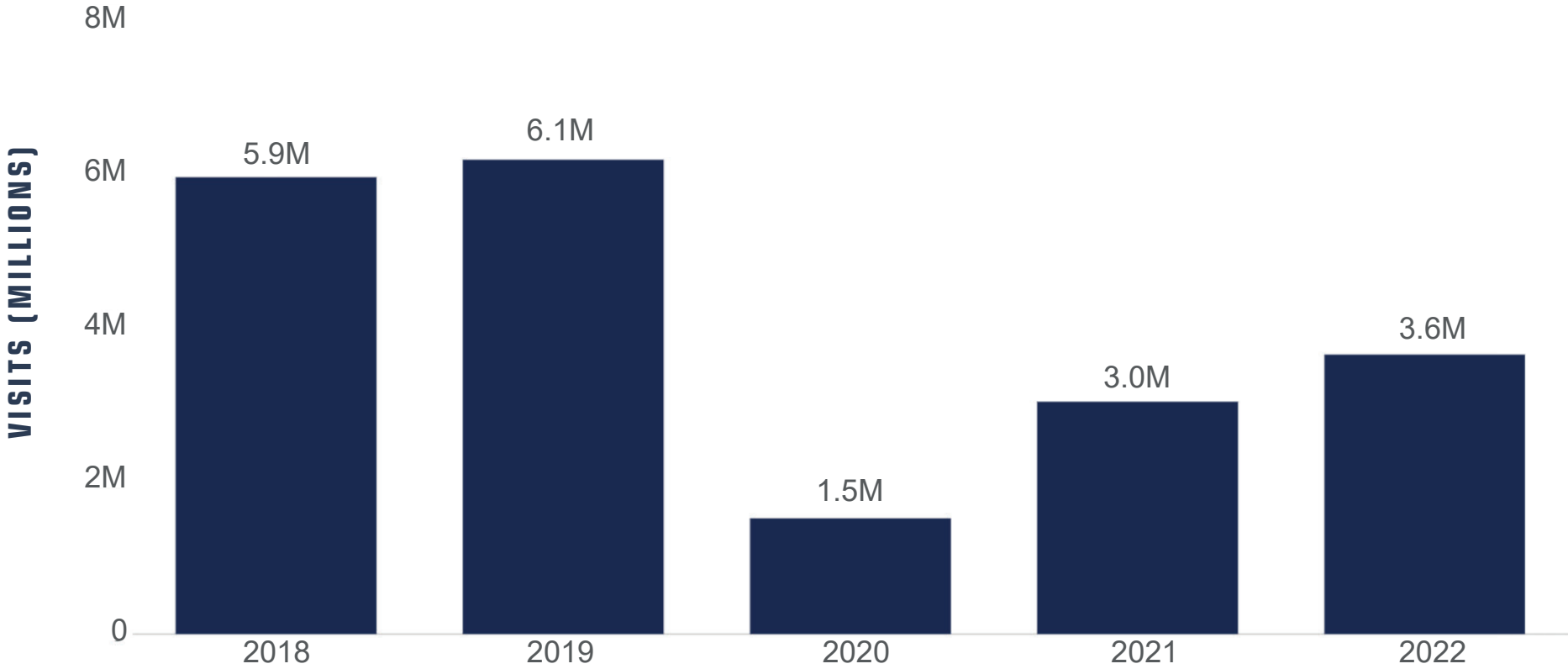
DOMESTIC OVERNIGHT VISITATION



AVERAGE: 38

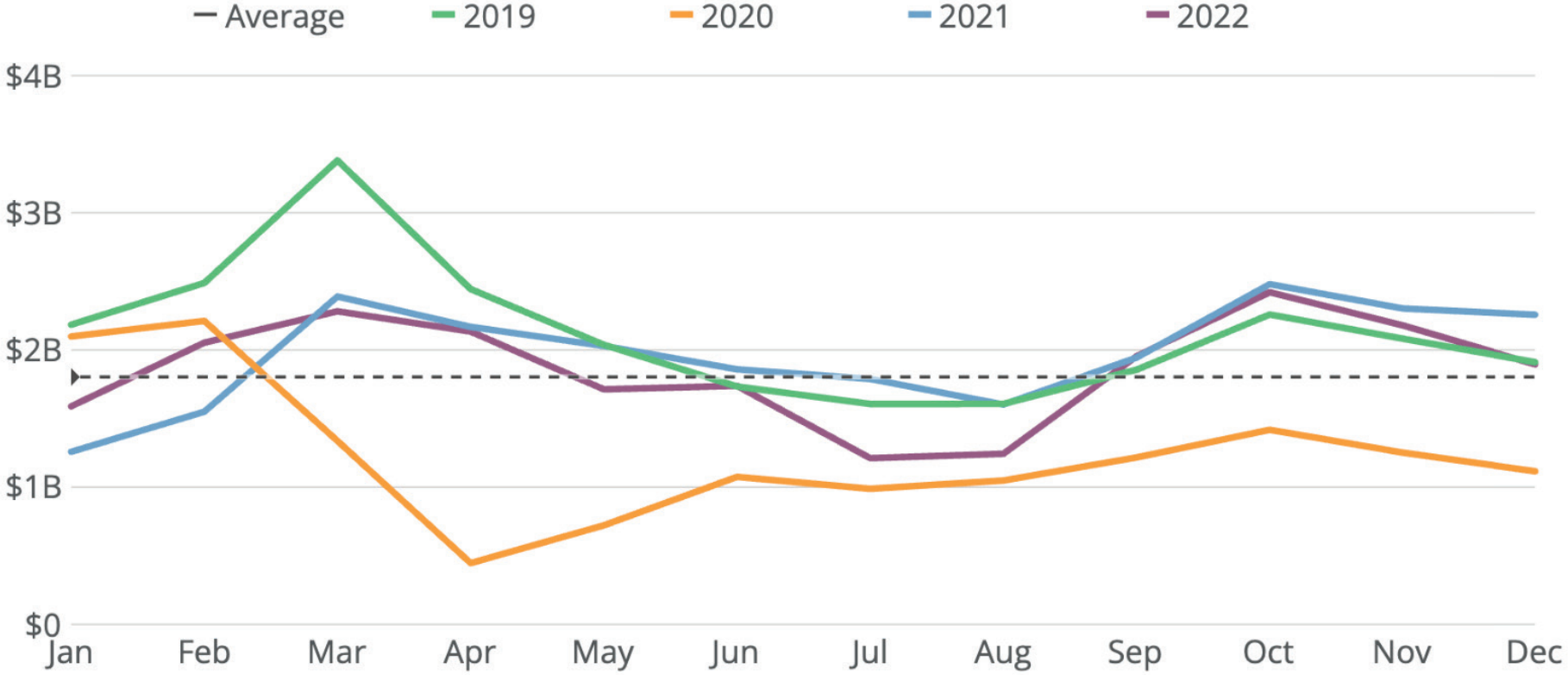
Source: Tourism Economics

INTERNATIONAL VISITATION



Source: Tourism Economics

TRAVEL SPENDING TREND

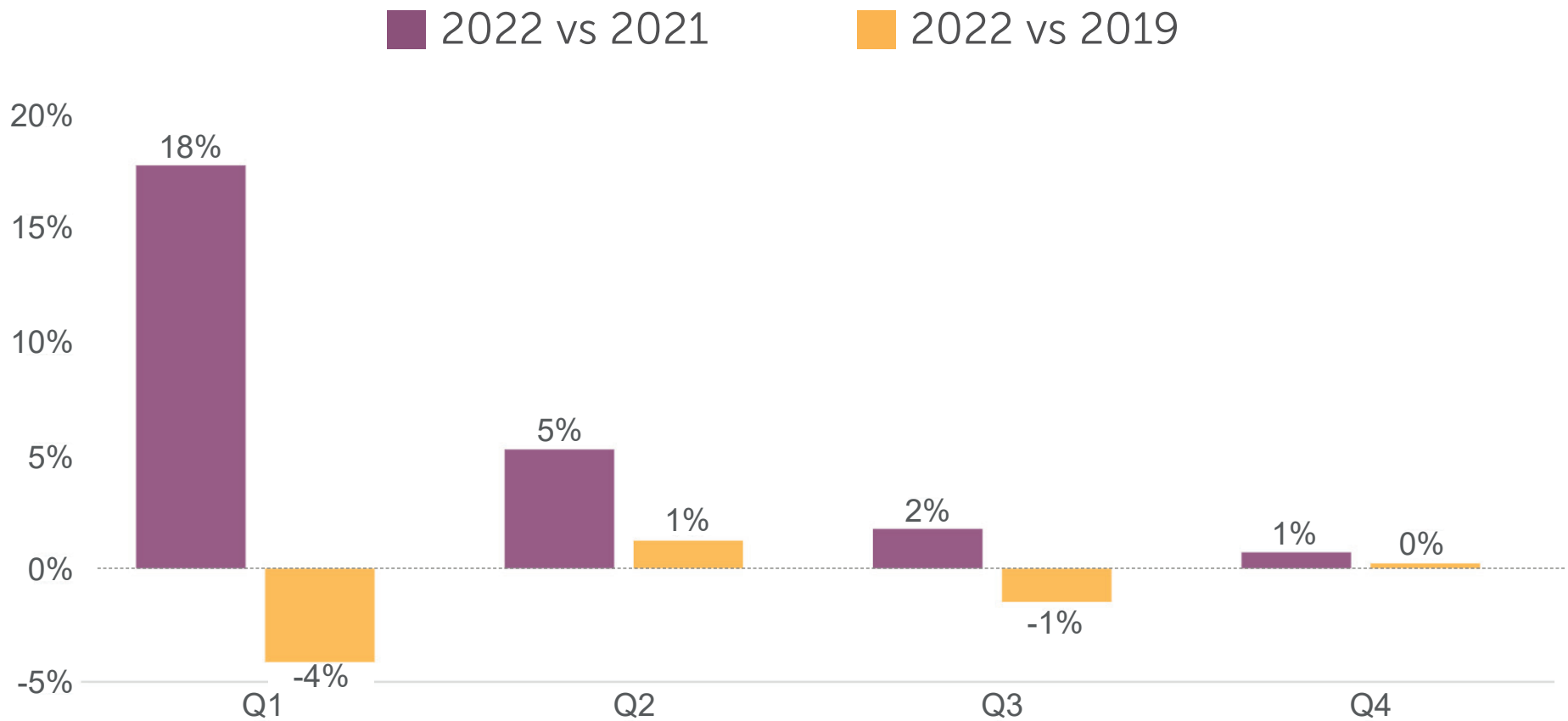


AVERAGE: \$1.80B

Source: Dean Runyan Associates

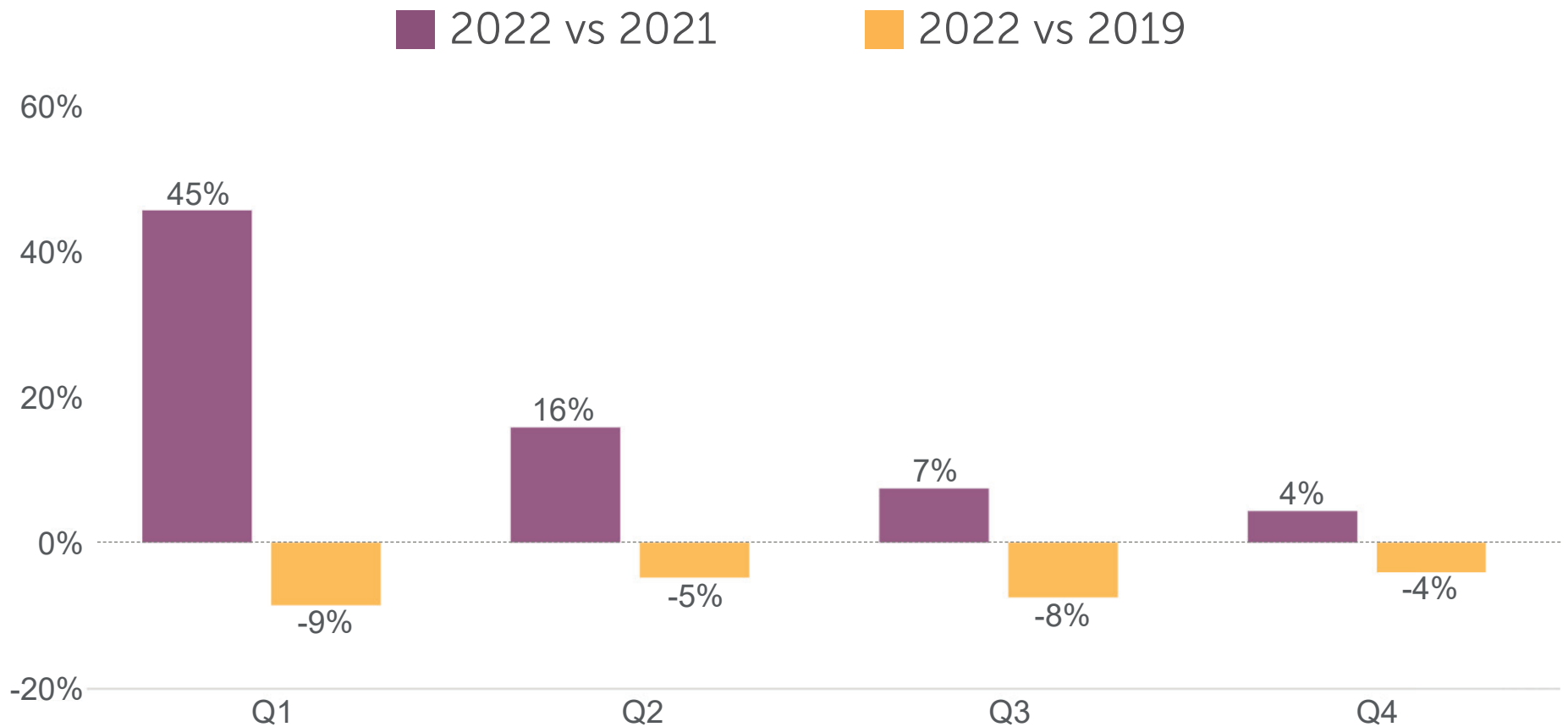
DOMESTIC OVERNIGHT VISITATION - % CHANGE

TOTAL



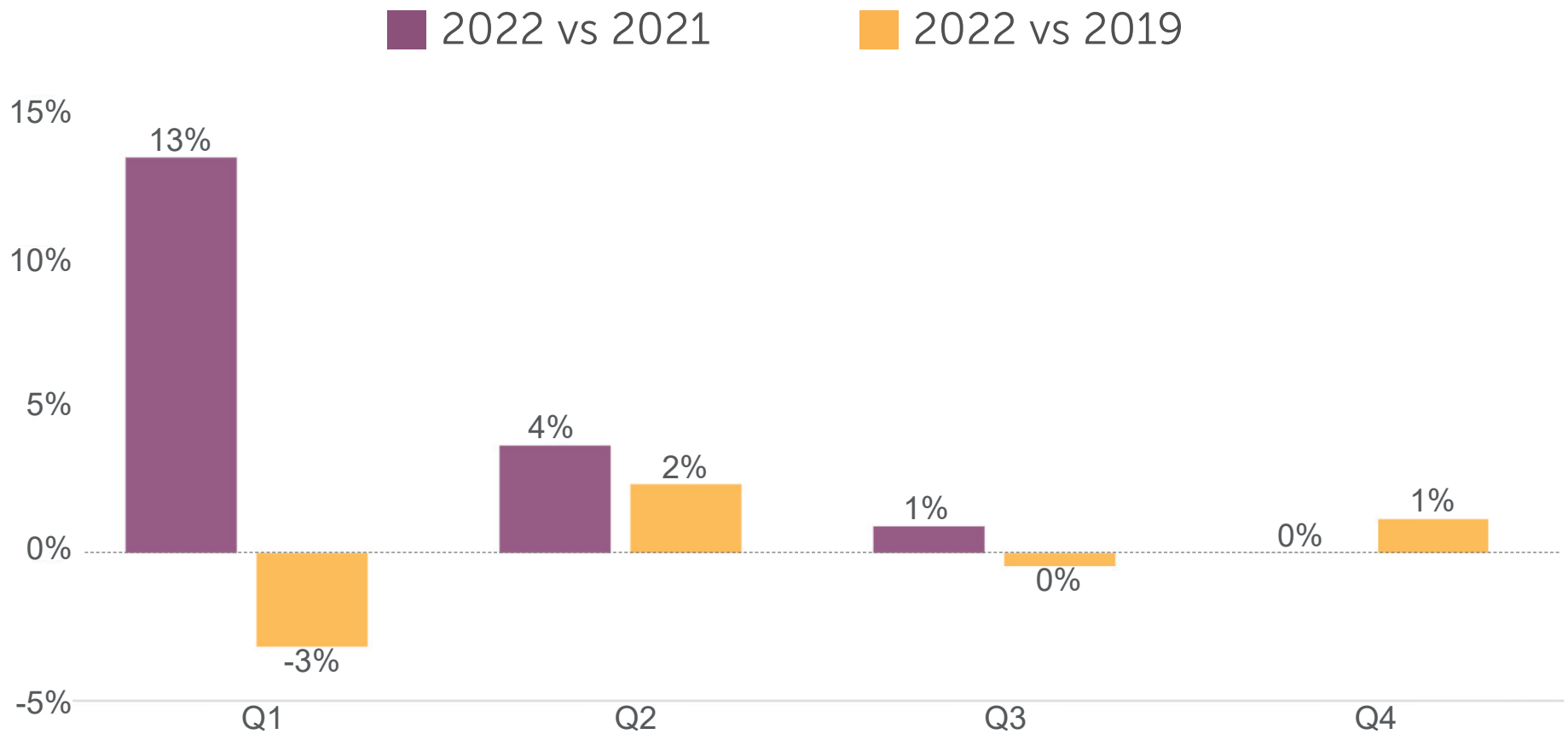
DOMESTIC OVERNIGHT VISITATION - % CHANGE

BUSINESS



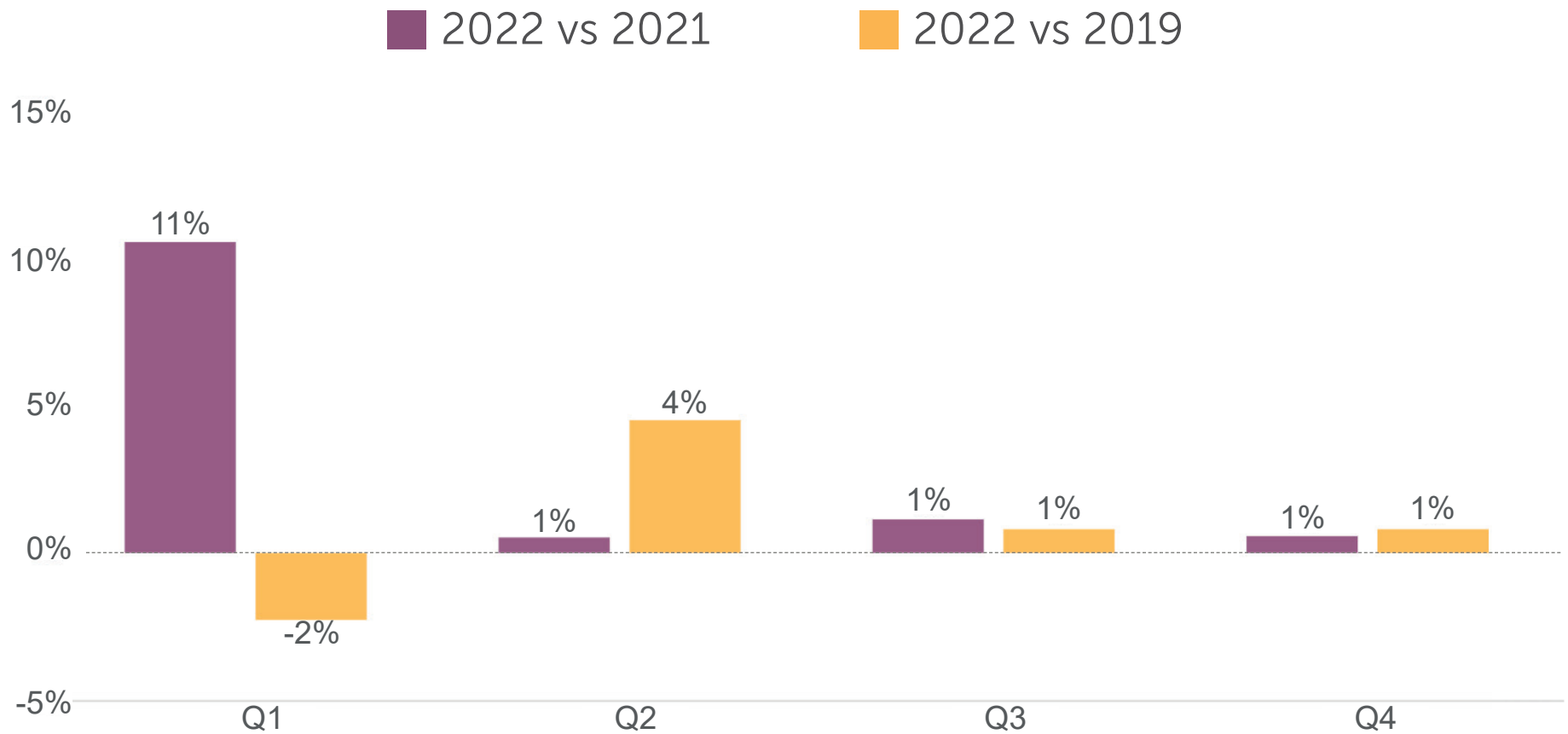
DOMESTIC OVERNIGHT VISITATION - % CHANGE

LEISURE



DOMESTIC OVERNIGHT VISITATION - % CHANGE

RESIDENT



VISITOR SPENDING BY COUNTY

MARICOPA

\$17.3B

2022 VS 2021

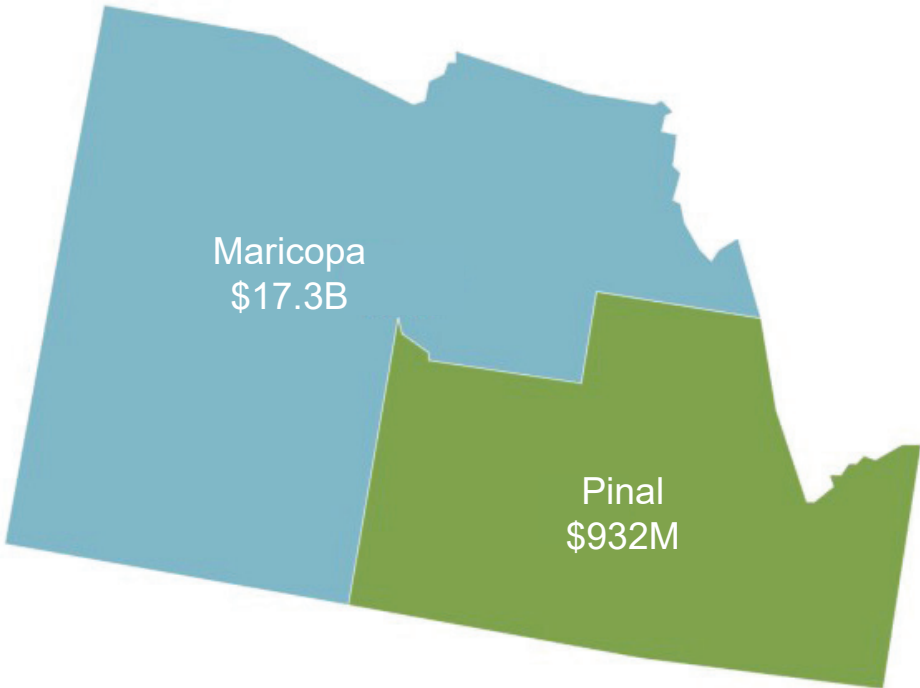
+24.6%

PINAL

\$932M

2022 VS 2021

+15.0%



Source: Arizona Travel Impacts, Dean Runyan Associates

TRAVEL IMPACTS

MARICOPA

DIRECT TRAVEL SPENDING

+\$3.4B

2022 VS 2021

+24.6%

LOCAL TAX RECEIPTS

+\$167,954,041

2022 VS 2021

+23.6%

EMPLOYMENT (JOBS)

+9K

2022 VS 2021

+10.4%

ACCOMMODATIONS SPENDING

+\$1.7B

2022 VS 2021

+25.5%

FOOD SERVICE SPENDING

+\$372,745,313

2022 VS 2021

+12.4%

EARNINGS

+\$741.8M

2022 VS 2021

+17.4%

Source: Arizona Travel Impacts, Dean Runyan Associates;
Summary value indicates 2022 value, change value compares to 2021.

TRAVEL IMPACTS

PINAL

DIRECT TRAVEL SPENDING

+\$122M

2022 VS 2021

+15.0%

LOCAL TAX RECEIPTS

+\$4.4M

2022 VS 2021

+14.4%

EMPLOYMENT (JOBS)

+410

2022 VS 2021

+7.3%

ACCOMMODATIONS SPENDING

+\$27.1M

2022 VS 2021

+33.5%

FOOD SERVICE SPENDING

+\$32.2M

2022 VS 2021

+11.9%

EARNINGS

+\$19.7M

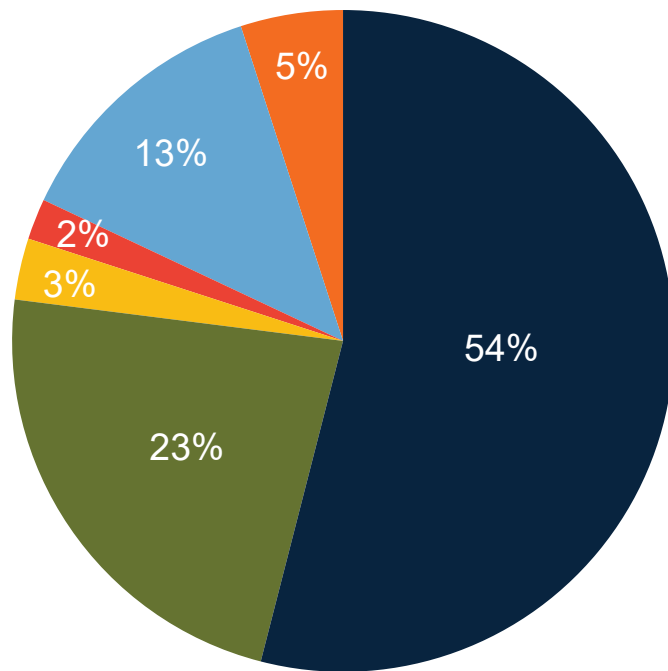
2022 VS 2021

+8.3%

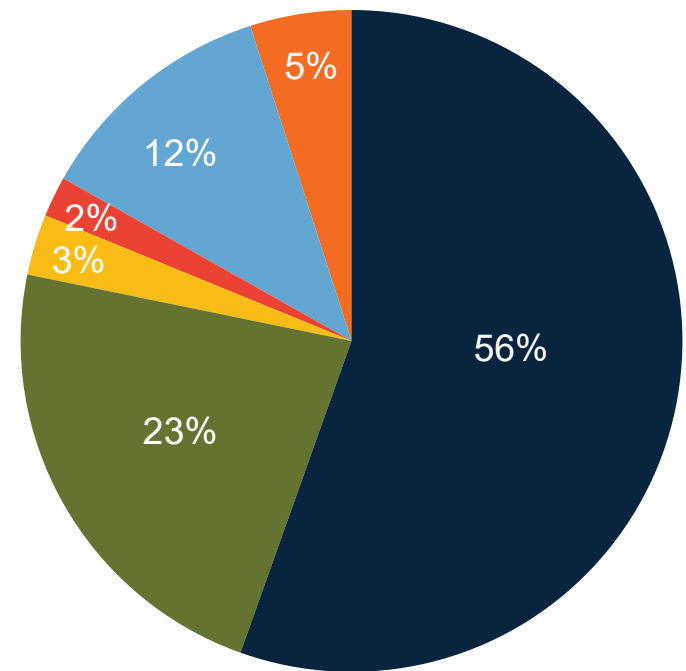
Source: Arizona Travel Impacts, Dean Runyan Associates;
Summary value indicates 2022 value, change value compares to 2021.

SPENDING BY ACCOMMODATION CHOICE

MARICOPA COUNTY 2021



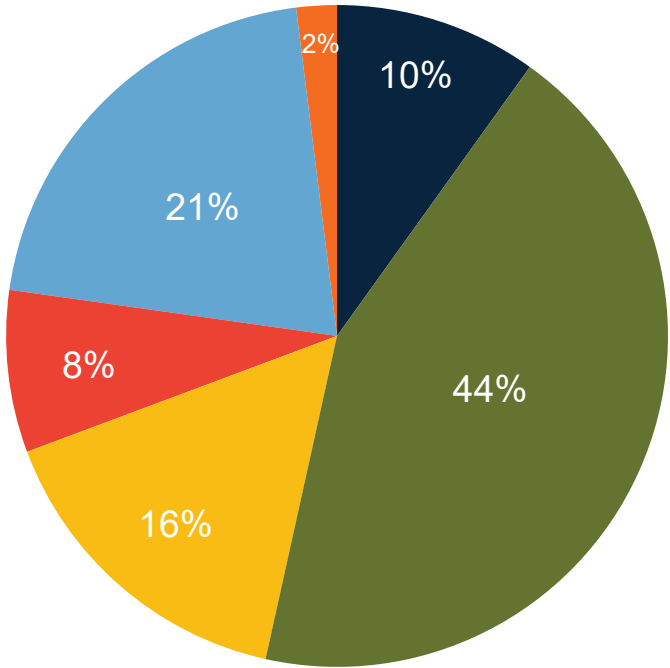
MARICOPA COUNTY 2022



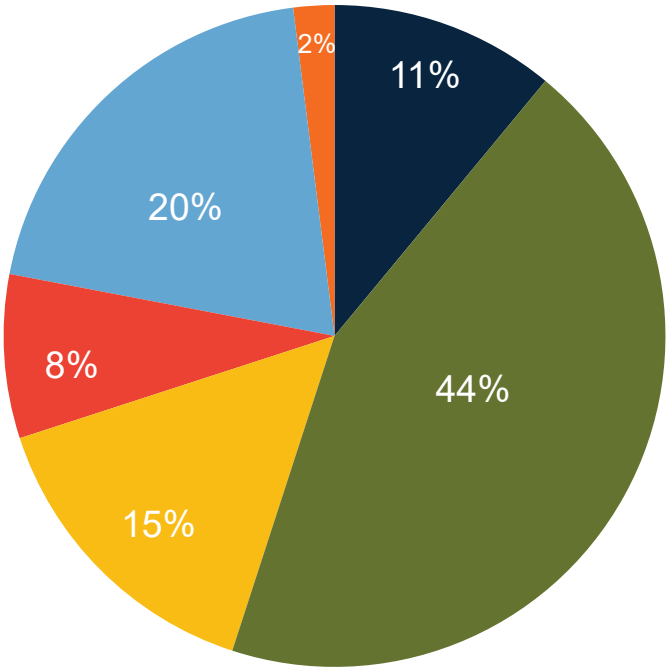
- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

SPENDING BY ACCOMMODATION CHOICE

PINAL COUNTY 2021



PINAL COUNTY 2022

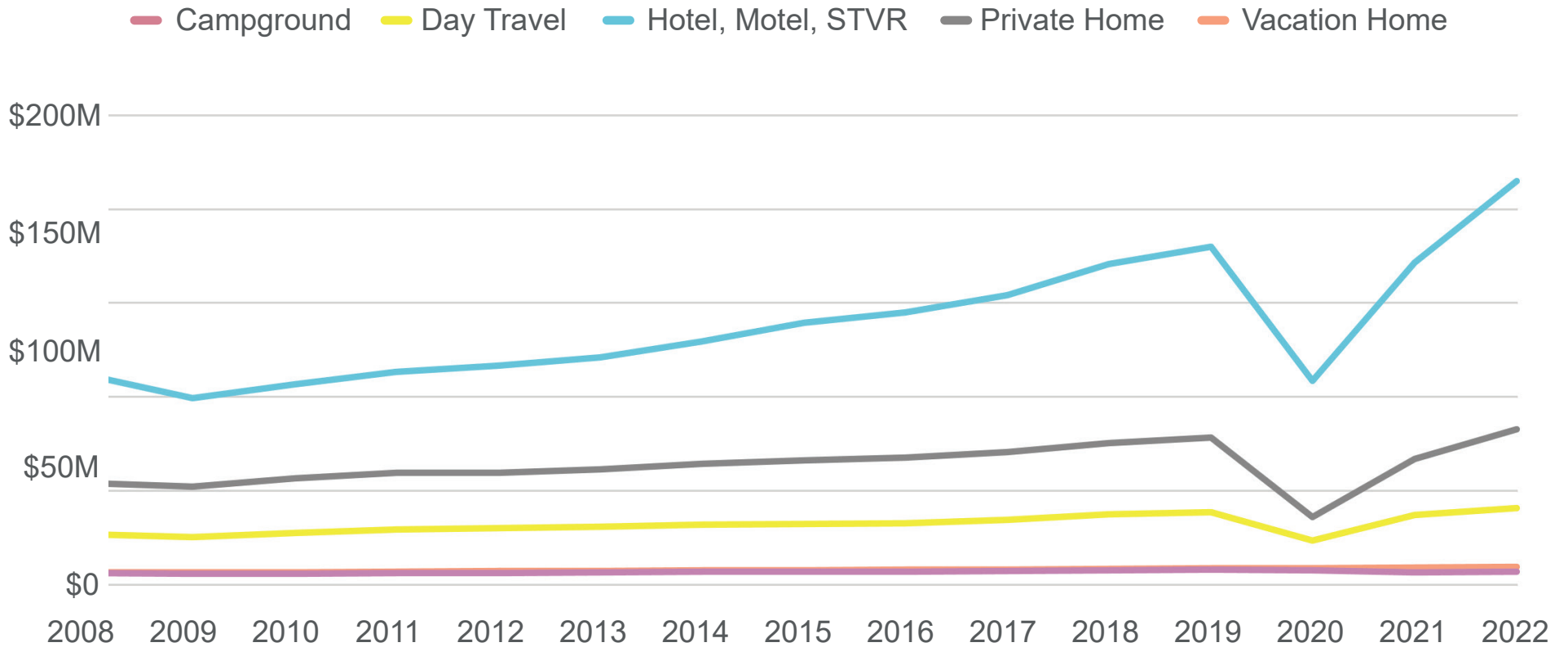


- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

Source: Arizona Travel Impacts, Dean Runyan Associates *STVR stands for Short-Term Vacation Rental

SPENDING BY ACCOMMODATION CHOICE

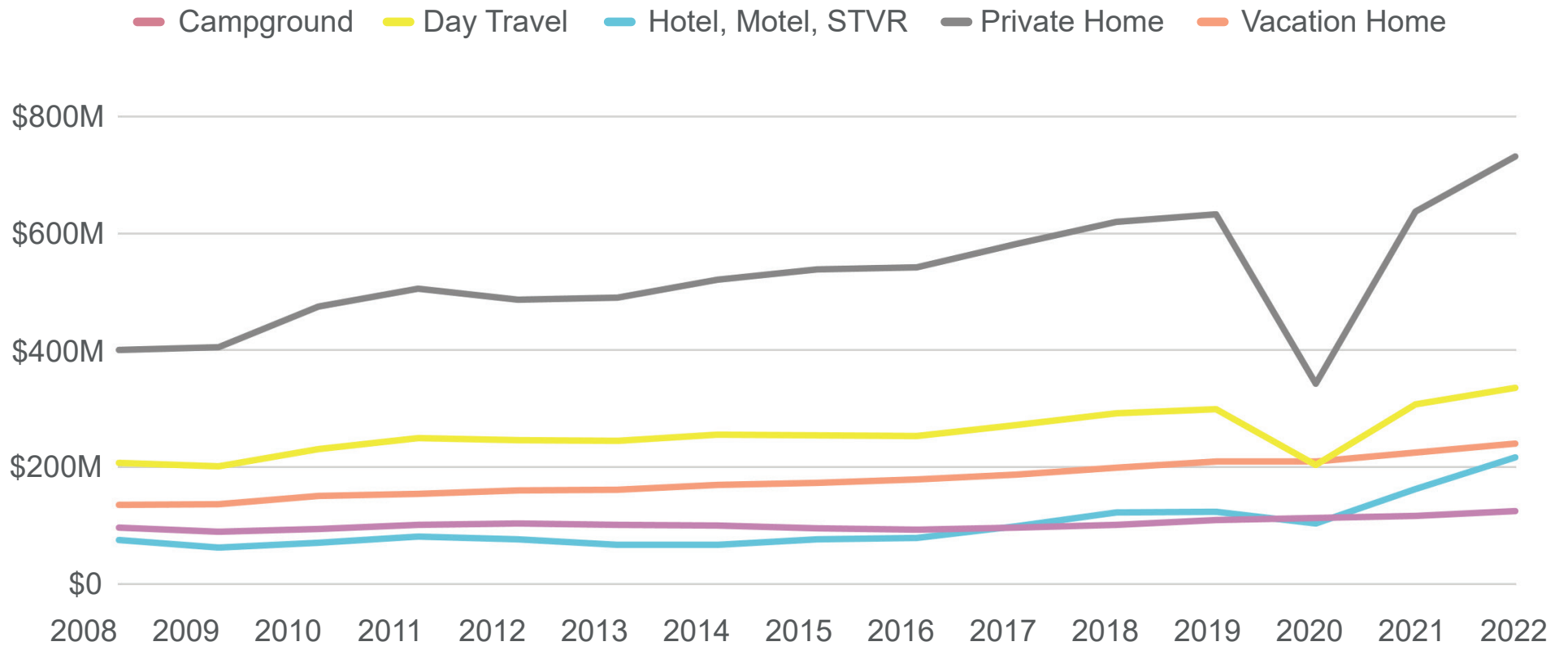
MARICOPA COUNTY



Source: Arizona Travel Impacts, Dean Runyan Associates *STVR stands for Short-Term Vacation Rental

SPENDING BY ACCOMMODATION CHOICE

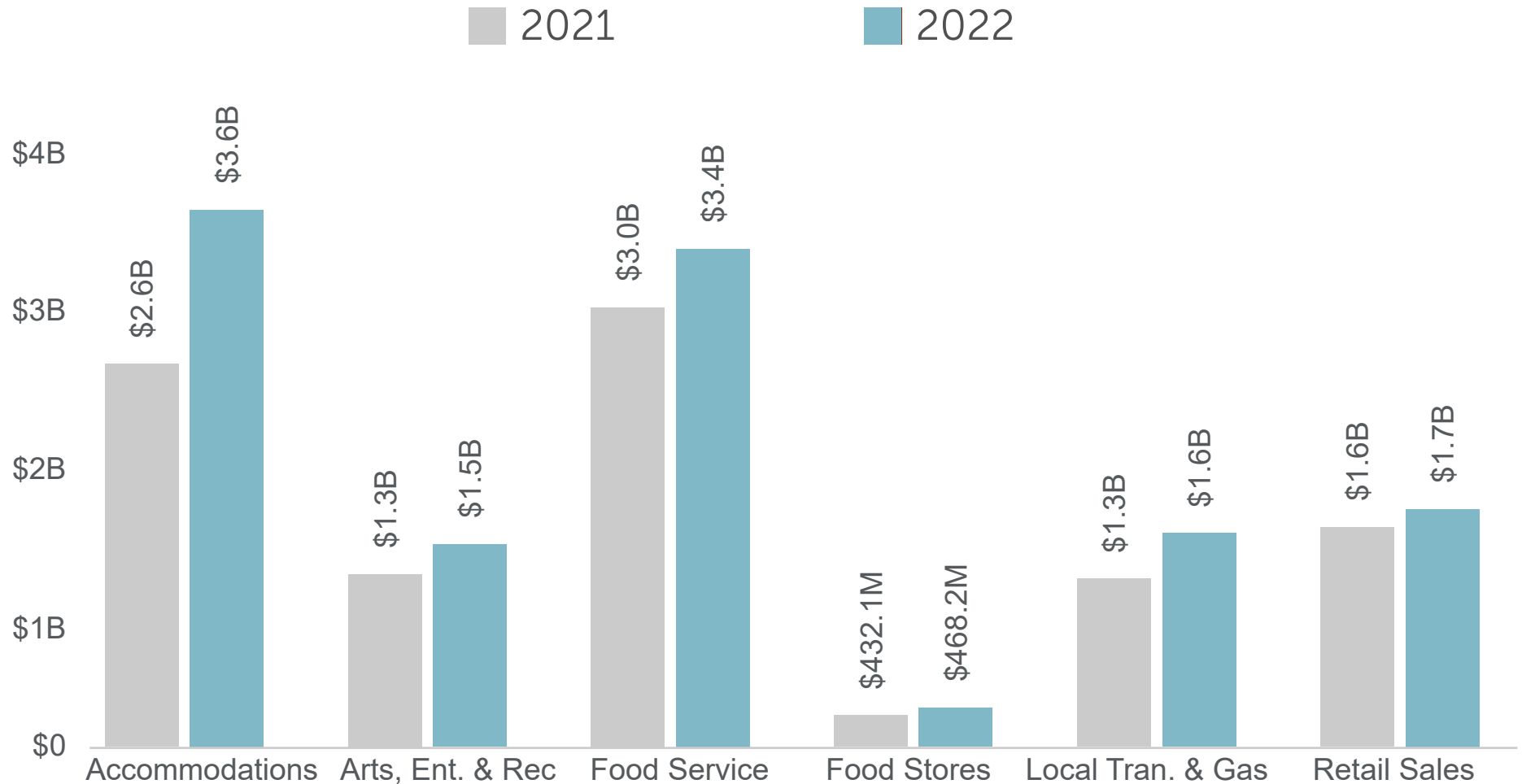
PINAL COUNTY



Source: Arizona Travel Impacts, Dean Runyan Associates *STVR stands for Short-Term Vacation Rental

SPENDING BY COMMODITY PURCHASE

MARICOPA COUNTY



SPENDING BY COMMODITY PURCHASE

PINAL COUNTY

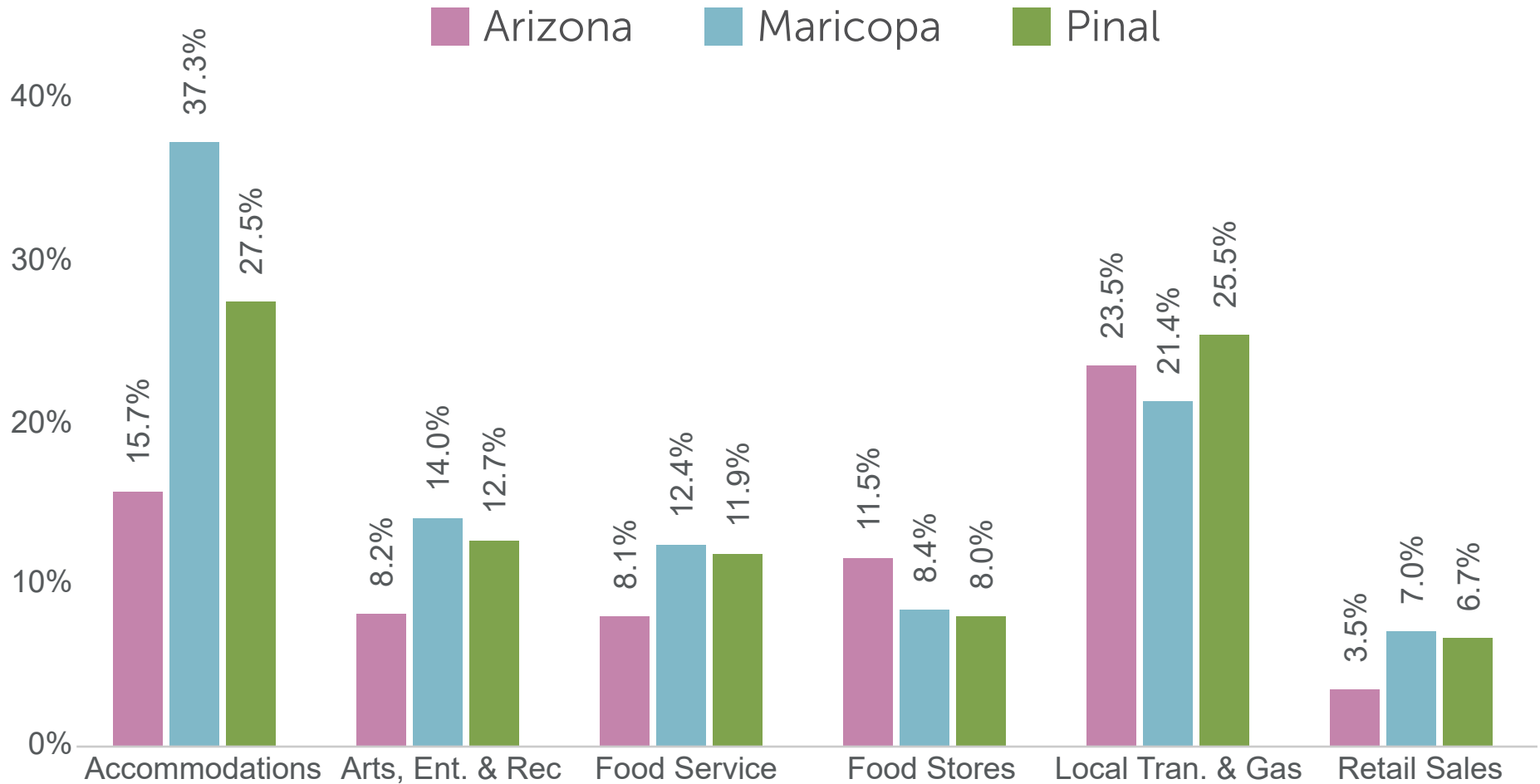
2021 2022



Source: Arizona Travel Impacts, Dean Runyan Associates

SPENDING BY COMMODITY PURCHASE

ALL COUNTIES

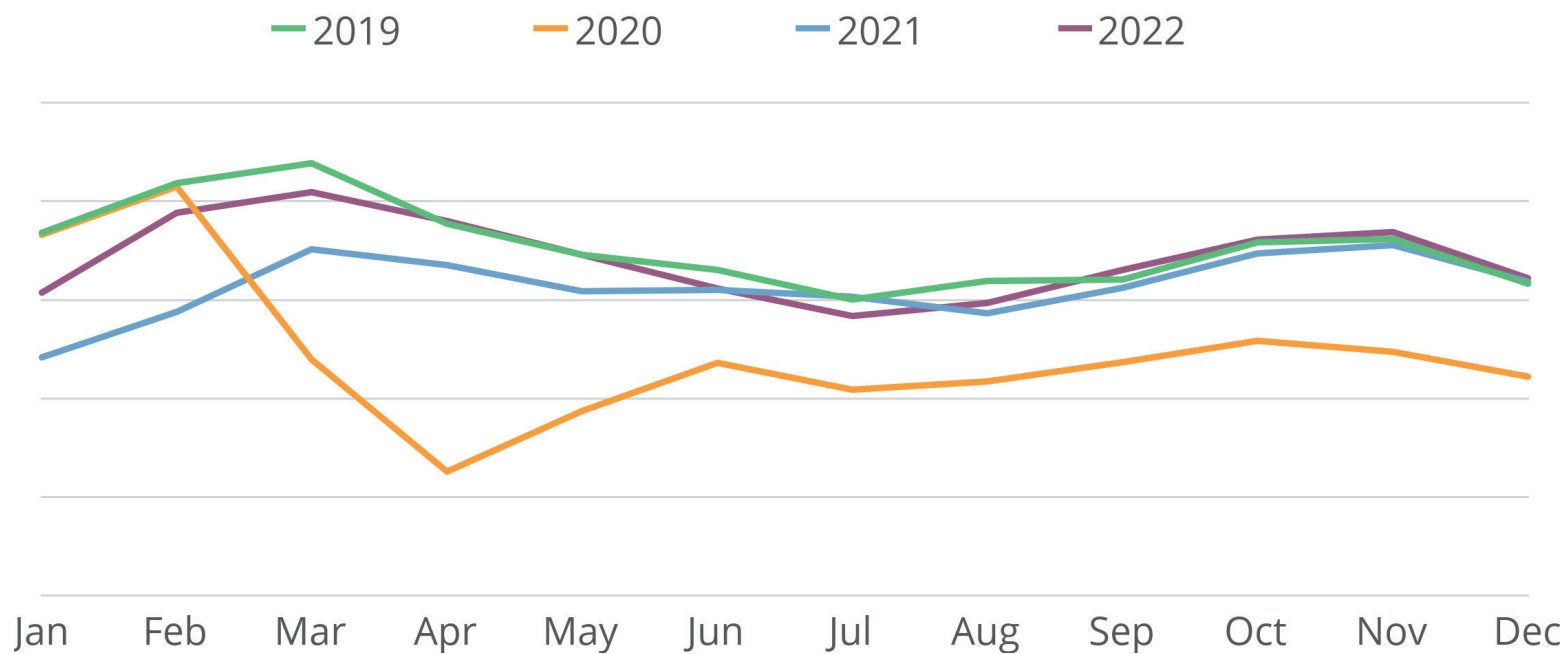


TOURISM INDICATORS

2022
PHOENIX & CENTRAL REGION

LODGING OCCUPANCY

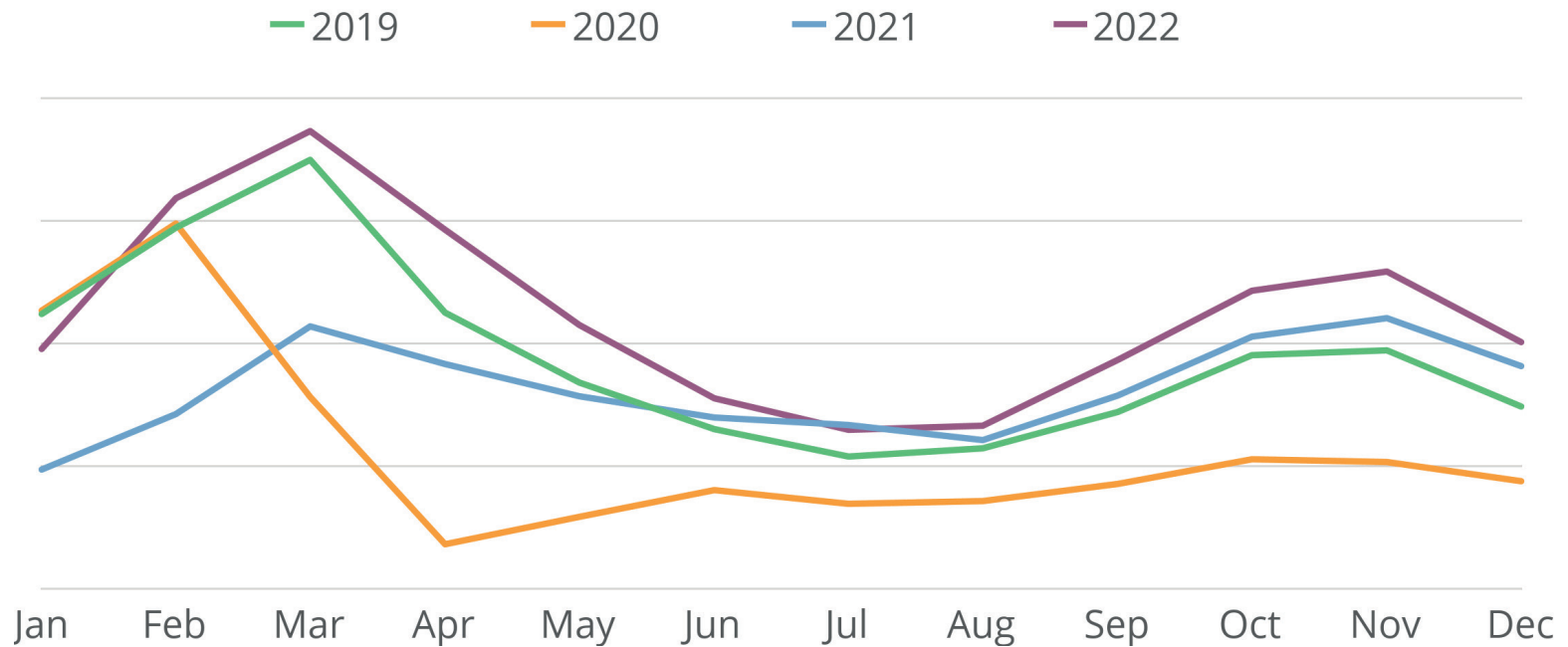
MARICOPA COUNTY



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

LODGING REVPAR

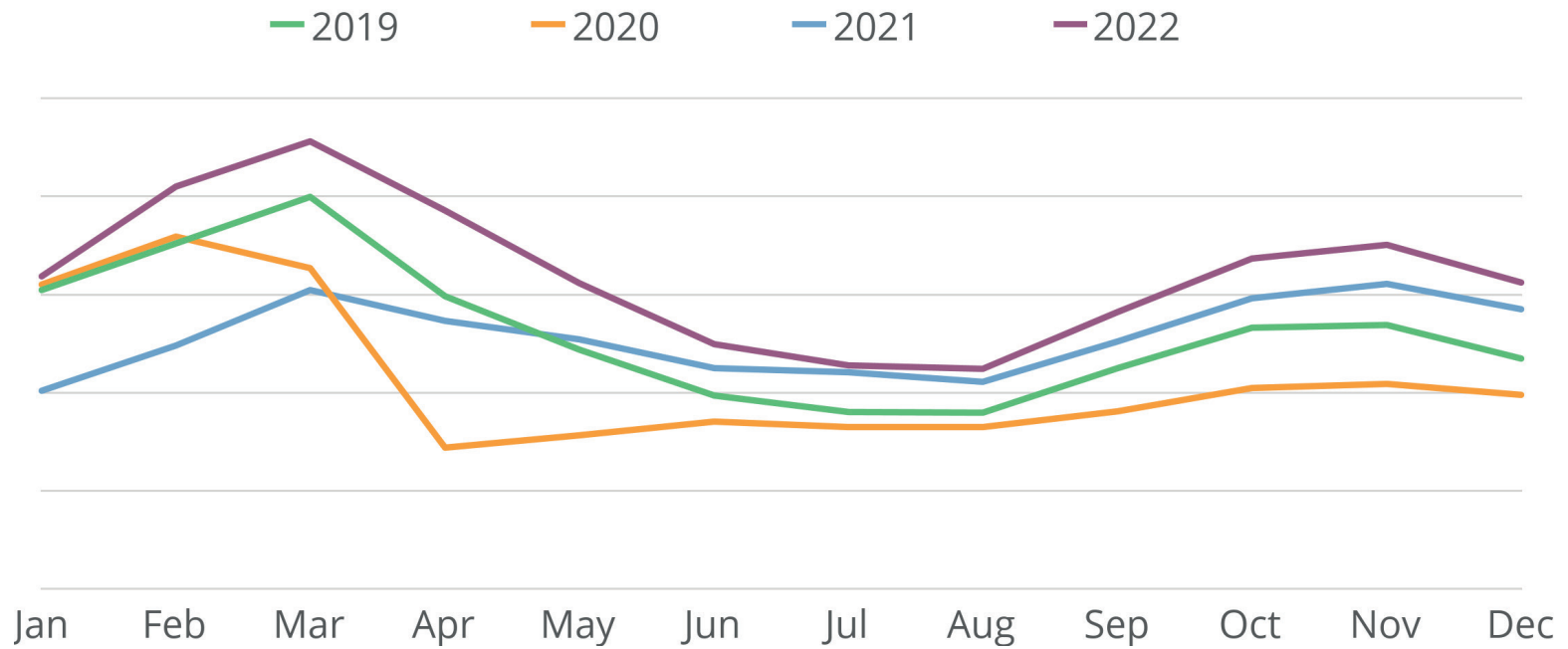
MARICOPA COUNTY



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

LODGING ADR

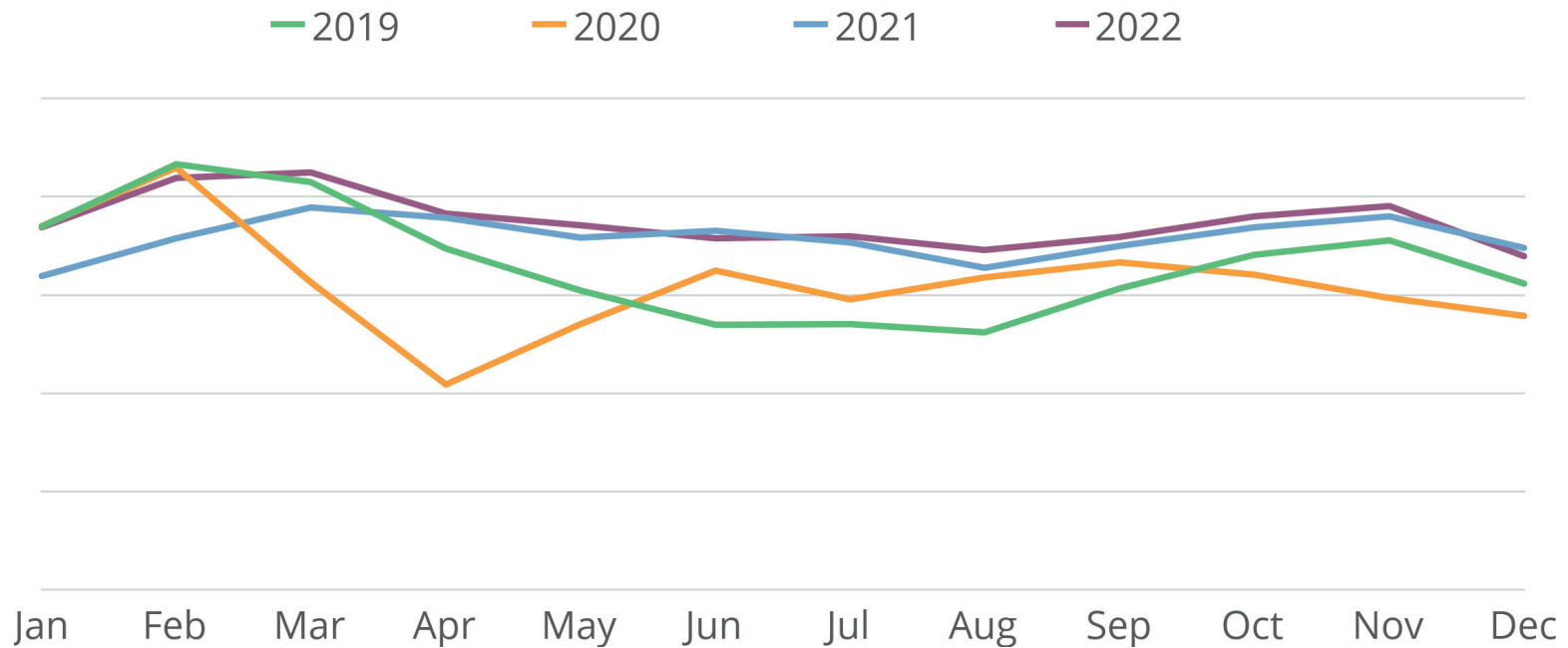
MARICOPA COUNTY



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

LODGING OCCUPANCY

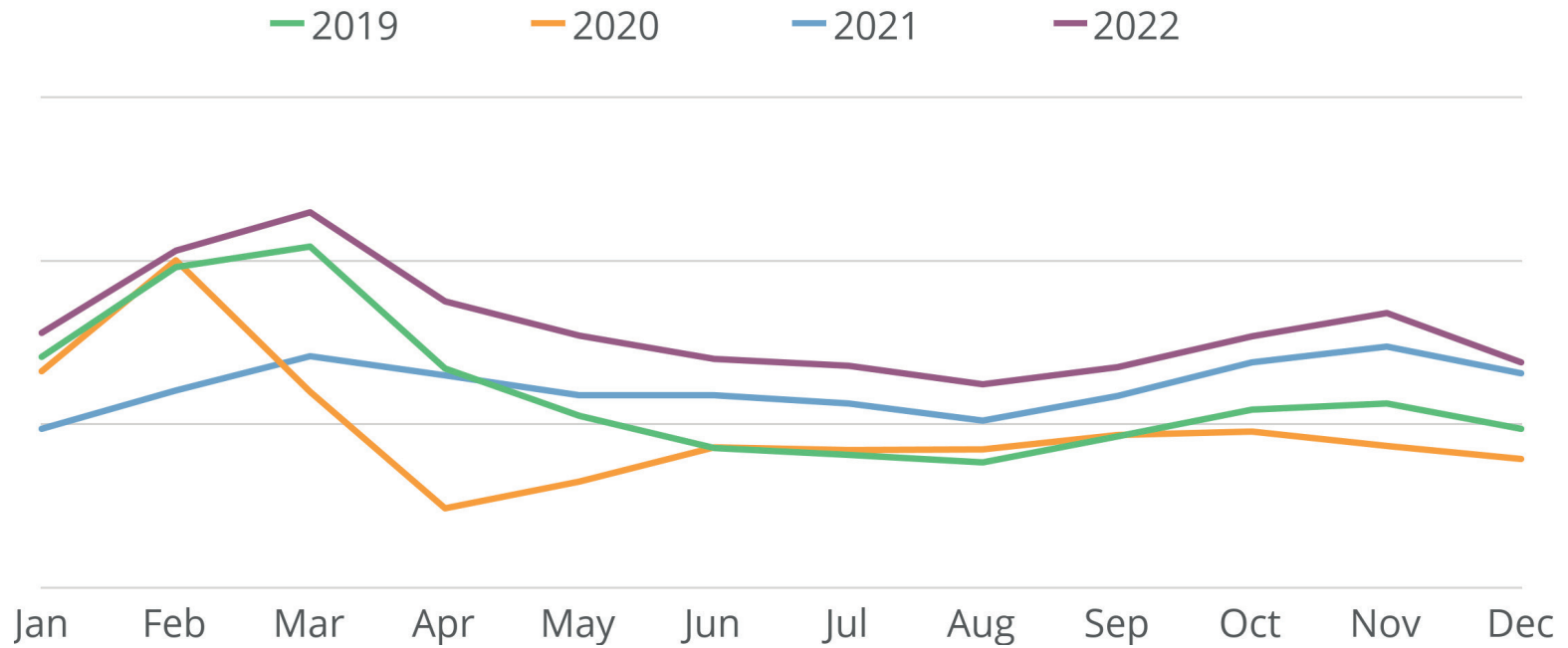
PINAL COUNTY



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LODGING REVPAR

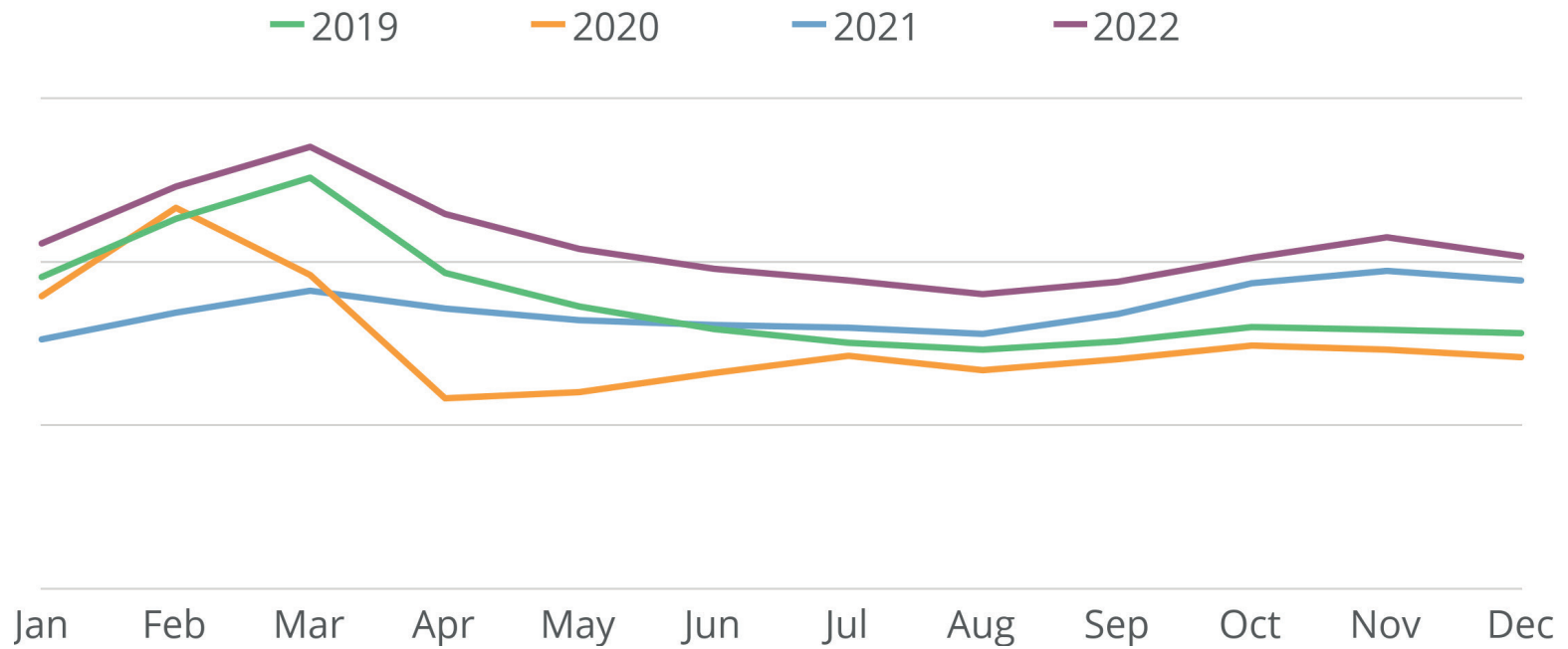
PINAL COUNTY



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

LODGING ADR

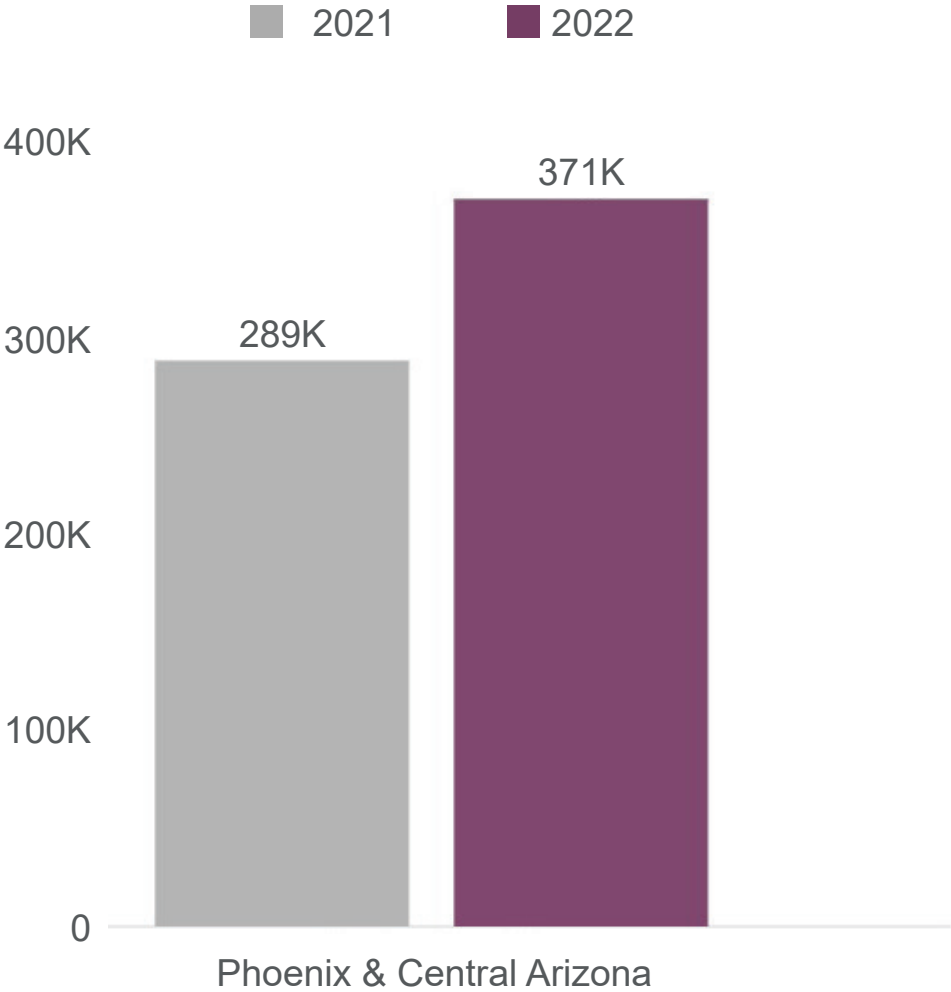
PINAL COUNTY



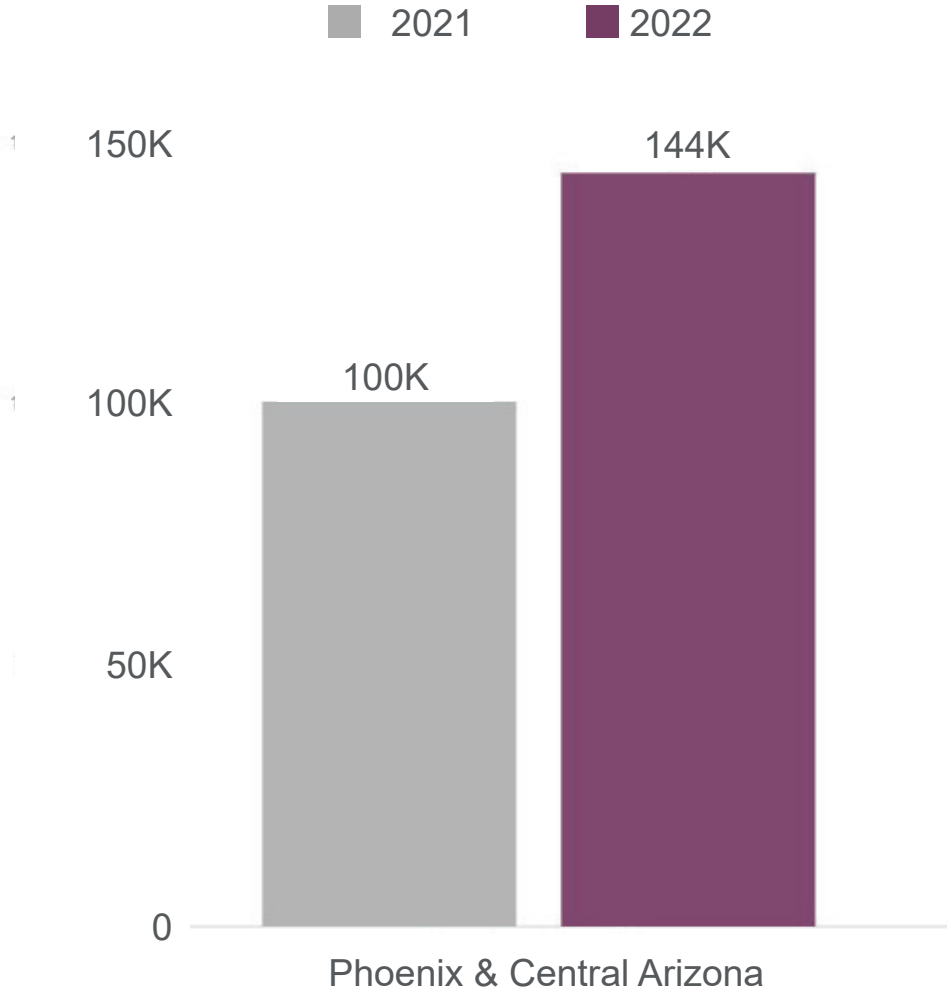
Source: Source: Smith Travel Research, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

SHORT-TERM RENTALS

Short Term Rental Supply

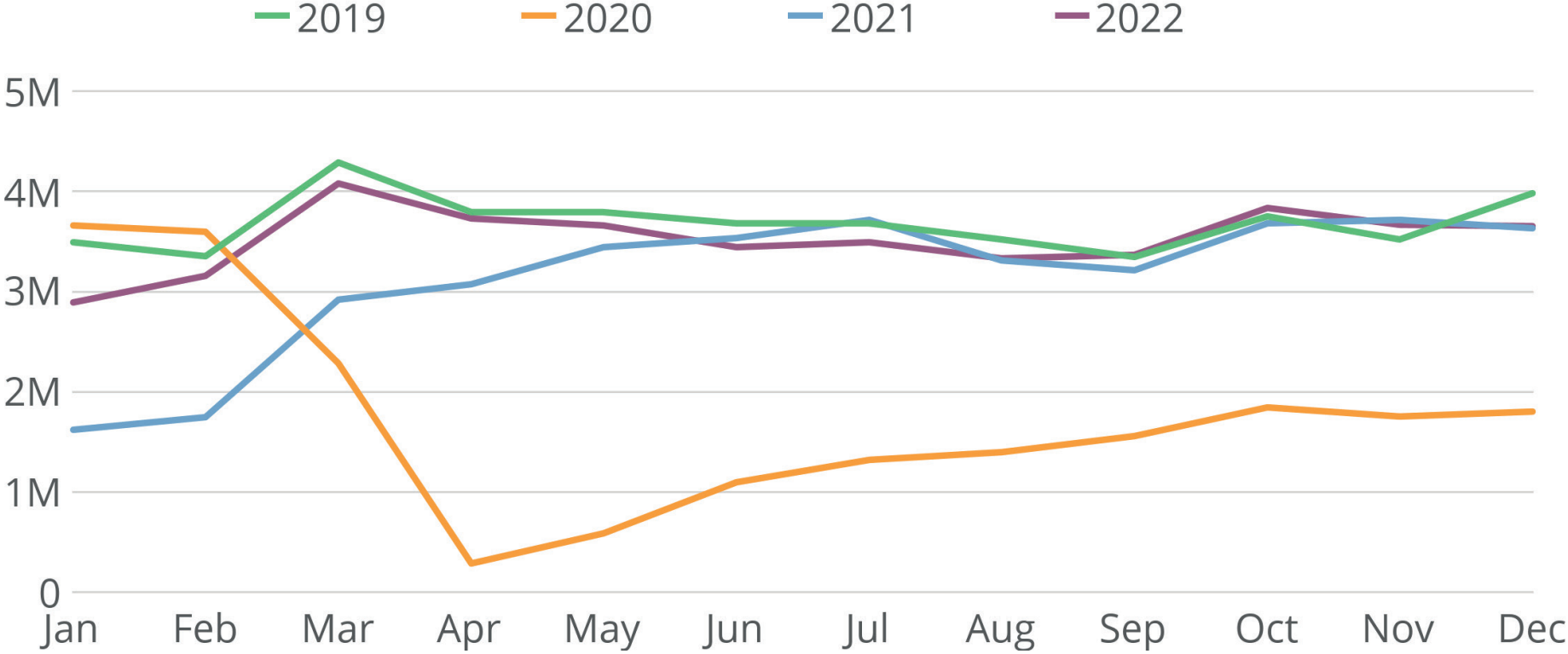


Short Term Rental Demand



Source: Key Data

AIRPORT PASSENGER TRAFFIC

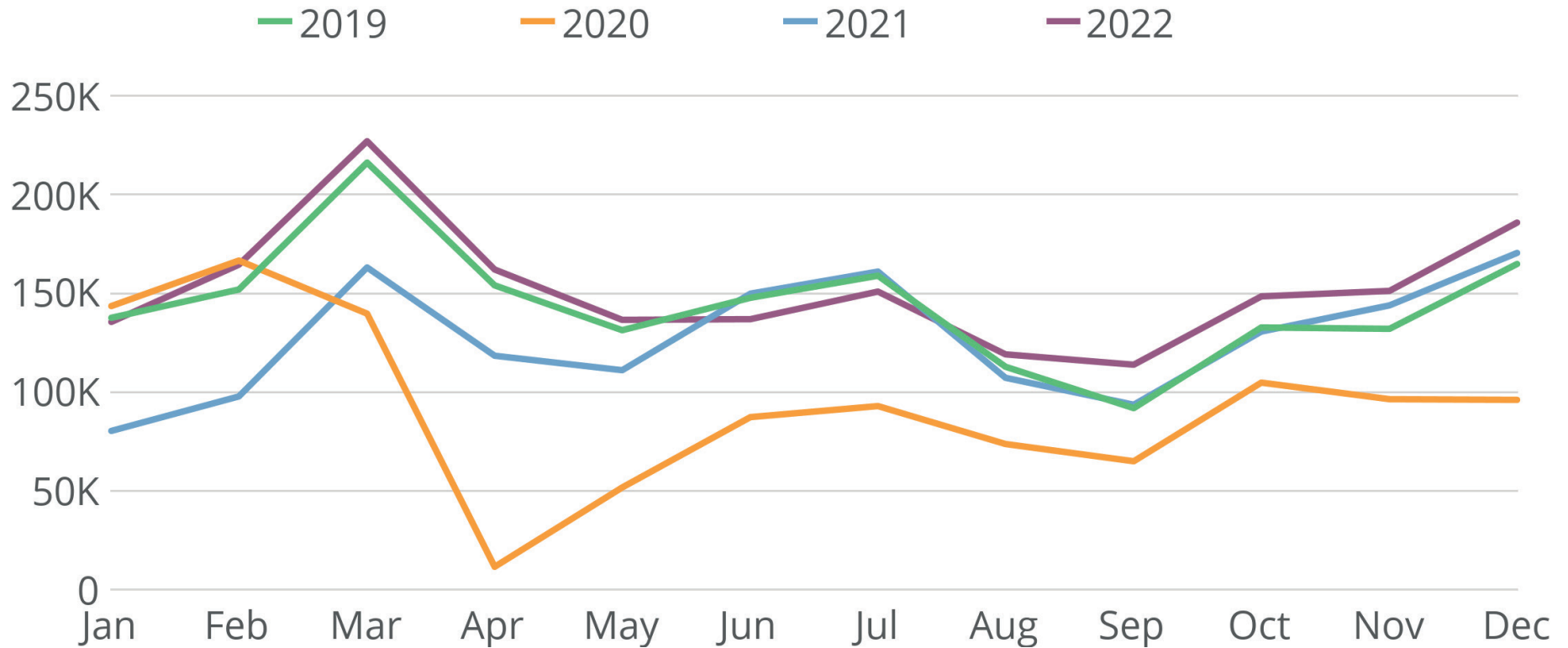


Phoenix Sky Harbor - Domestic

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

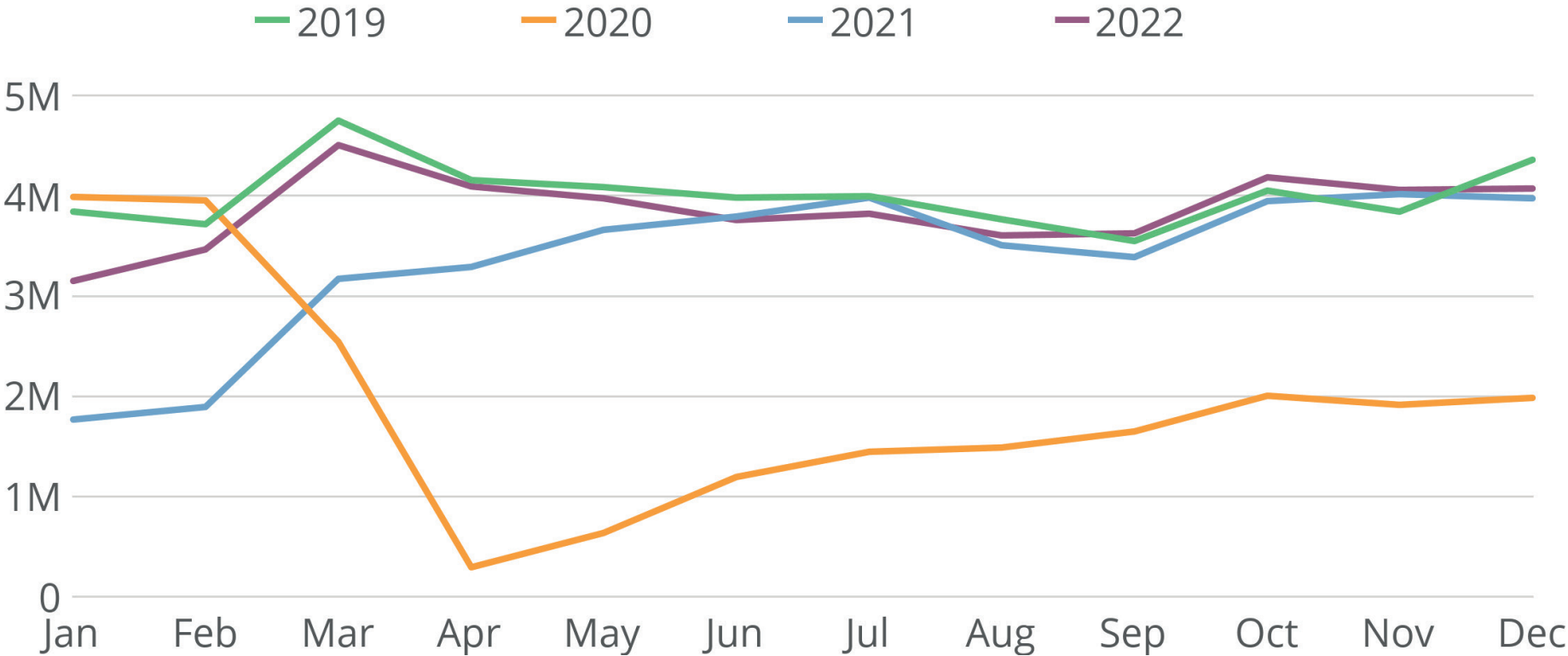


AIRPORT PASSENGER TRAFFIC



Phoenix Mesa Gateway - All Traffic

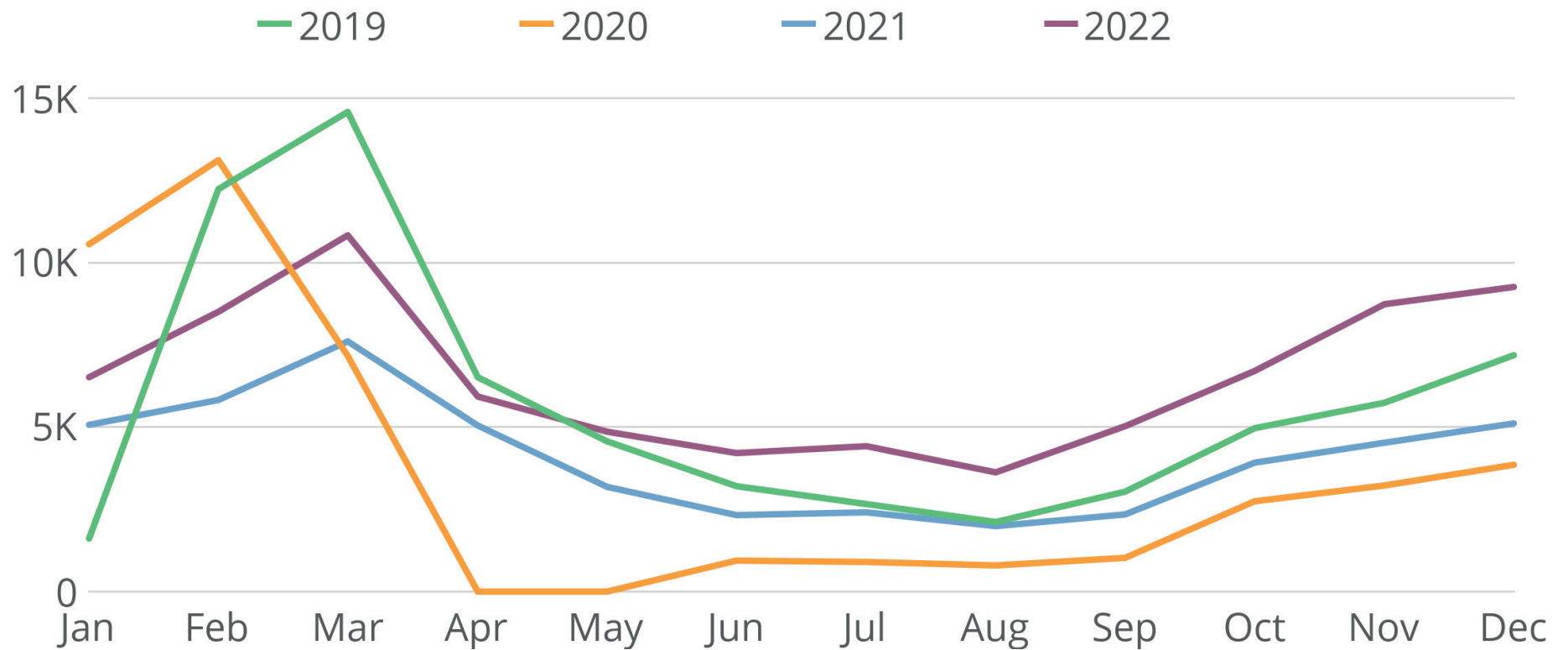
AIRPORT PASSENGER TRAFFIC



Phoenix & Central Region

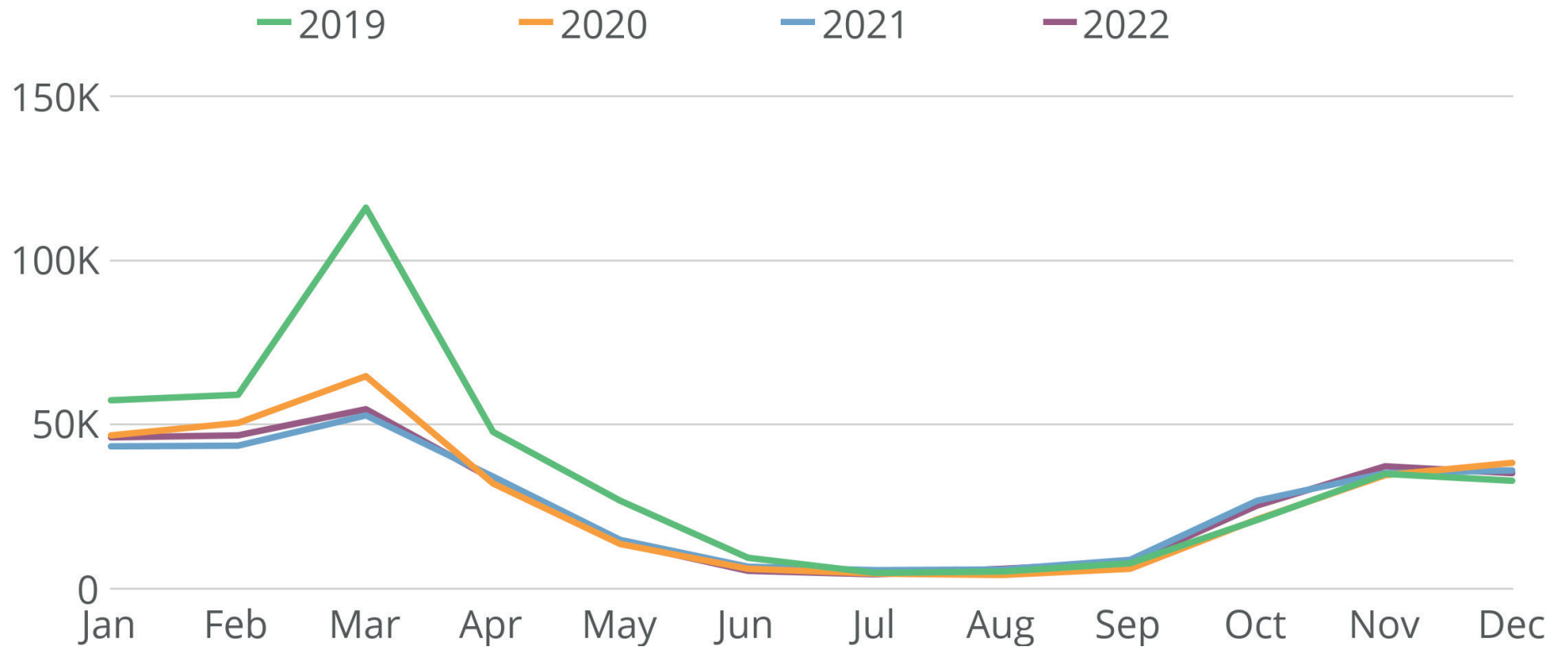
Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports

NATIONAL PARK VISITATION



Includes: Casa Grande National Monument

STATE PARK VISITATION

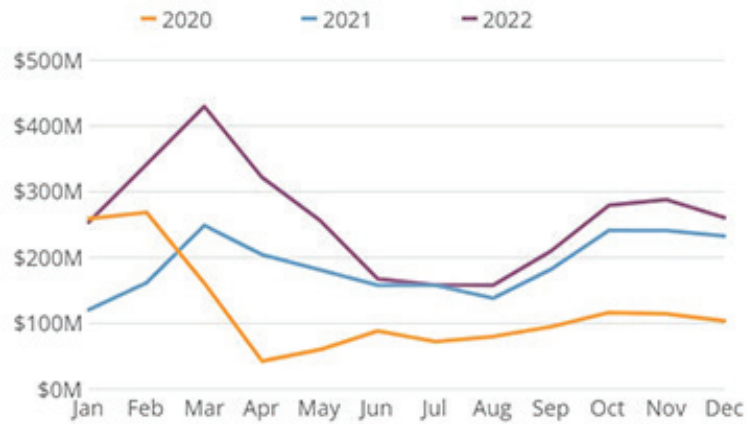


Includes: Lost Dutchman SP, McFarland SHP, Oracle SP, Picacho Peak SP

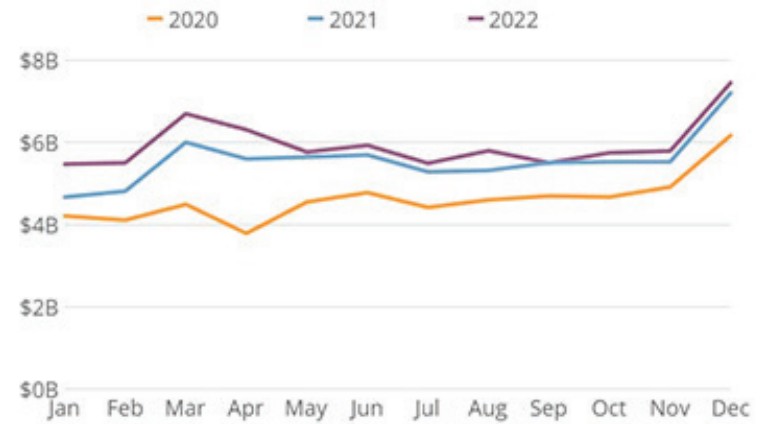
GROSS SALES

MARICOPA COUNTY

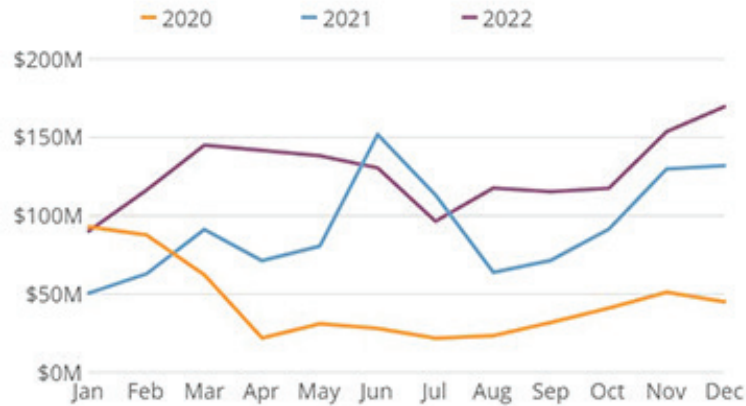
Lodging



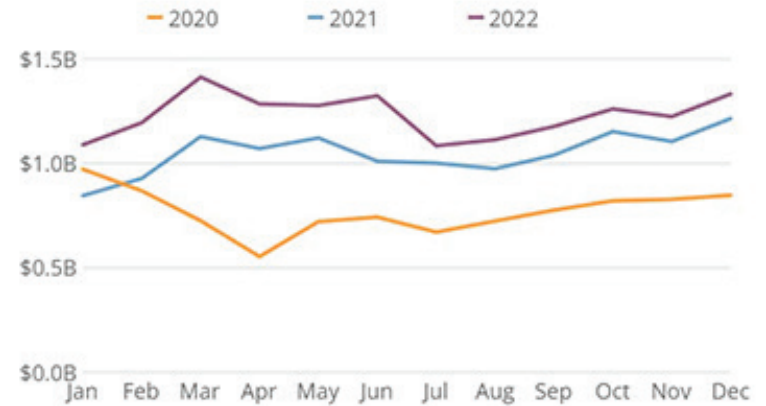
Retail



Amusement



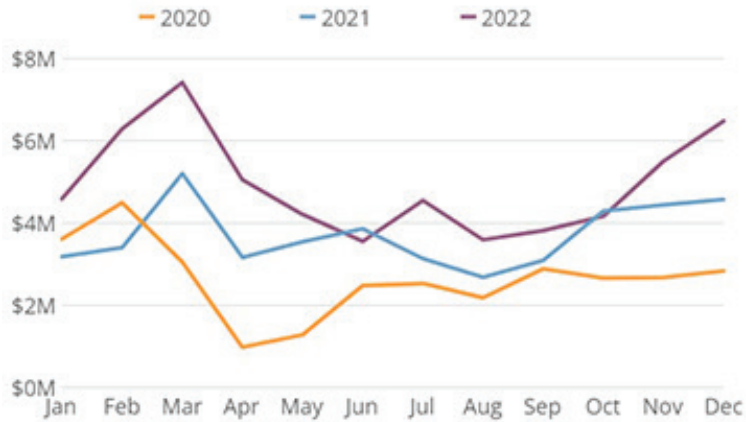
Restaurant/Bar



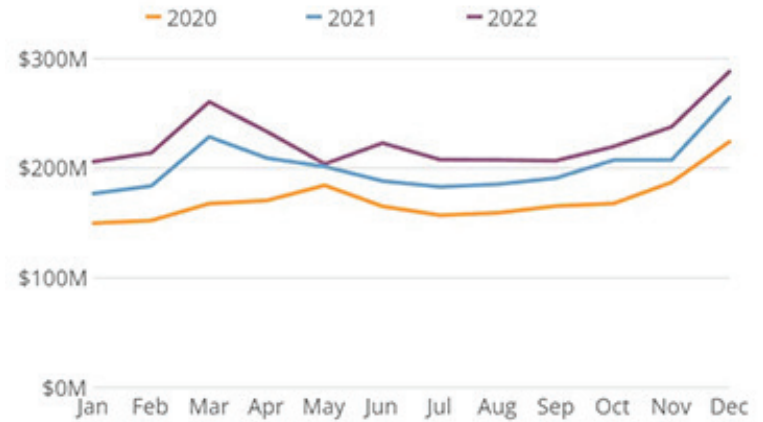
GROSS SALES

PINAL COUNTY

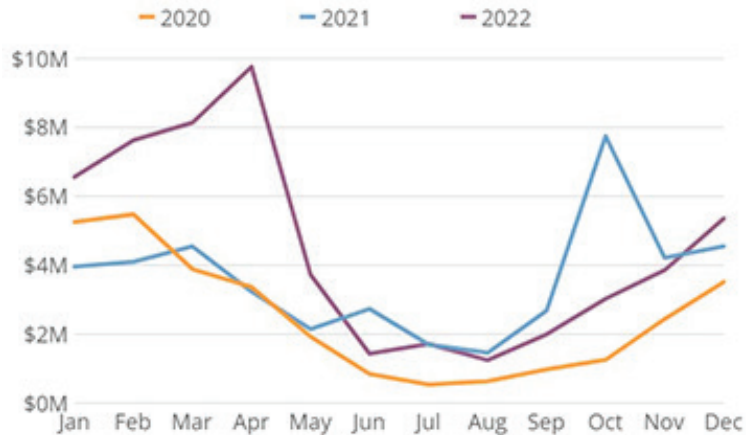
Lodging



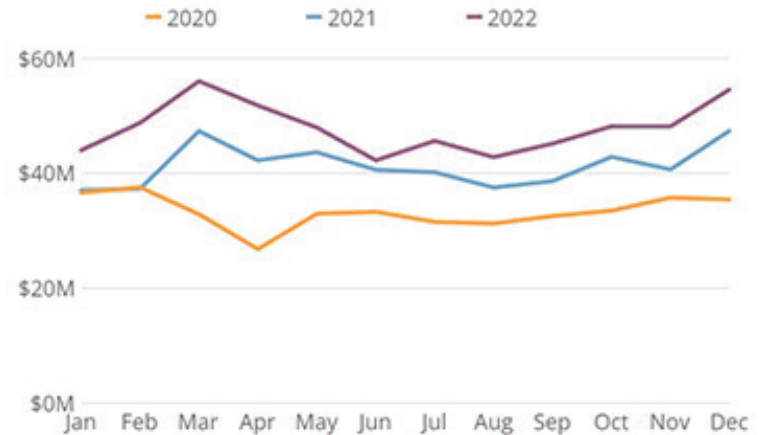
Retail



Amusement

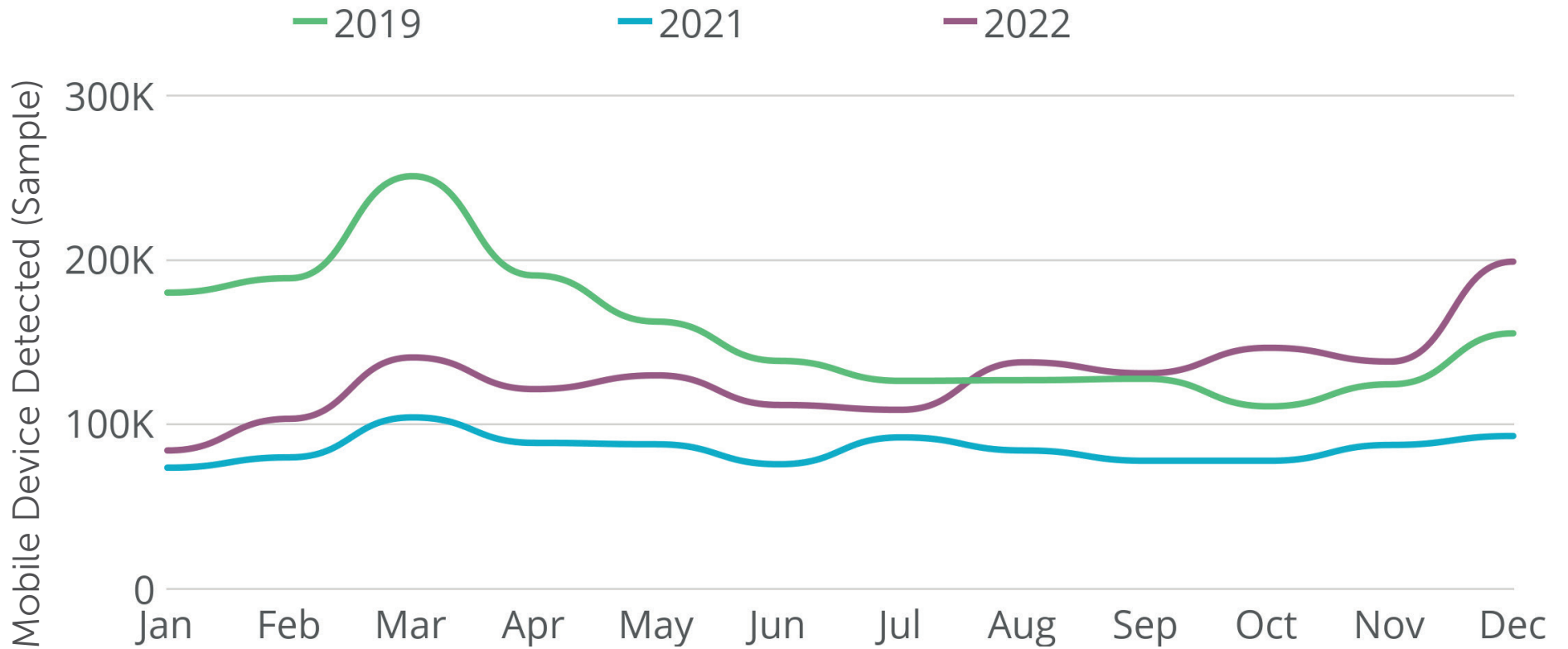


Restaurant/Bar



2022 VISITATION SUMMARY

TRIPS TO MARICOPA COUNTY BY MONTH



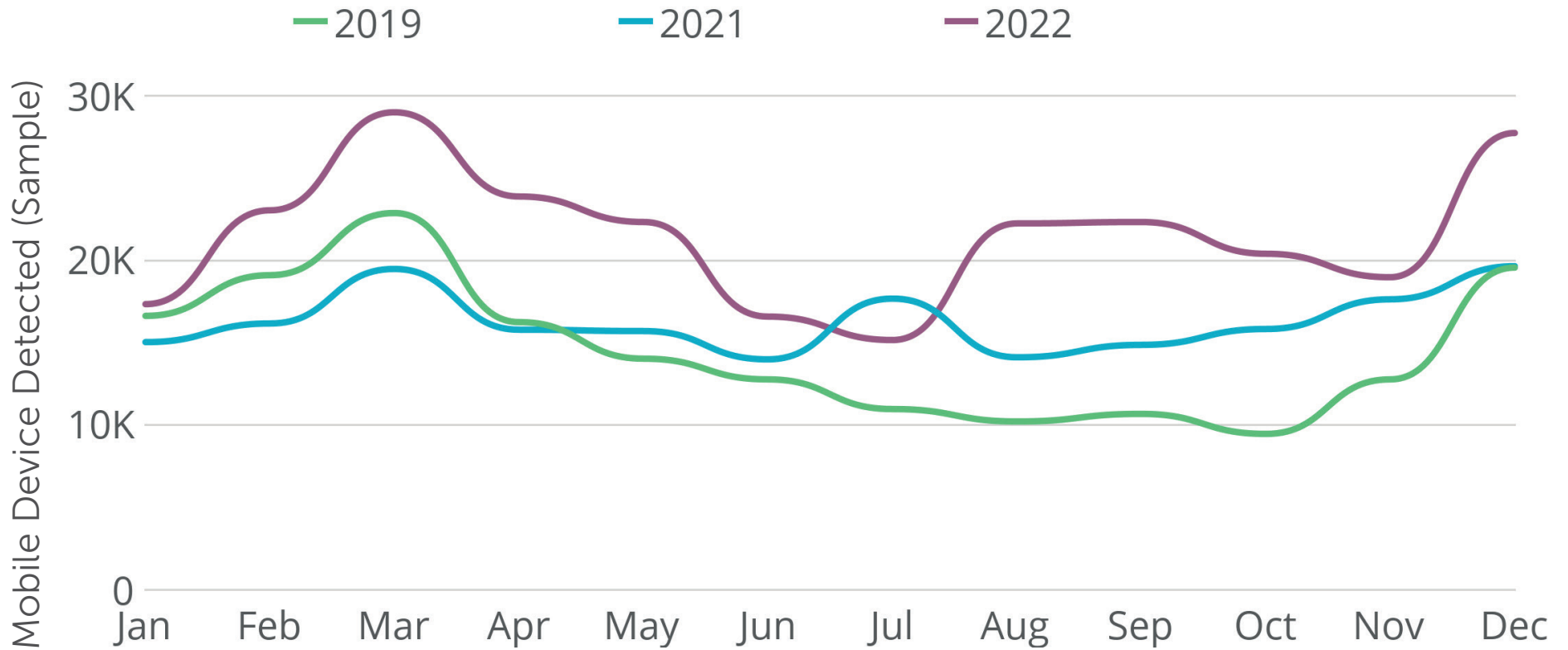
2022 VISITATION SUMMARY

TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | MARICOPA COUNTY

| Origin DMA | % Total Visitation | Repeat Visitor Ratio | Average Time in Destination |
|---------------------------|--------------------|----------------------|-----------------------------|
| Phoenix, AZ | 22% | 88% | 3.5 |
| Tucson (Sierra Vista), AZ | 12% | 83% | 3.3 |
| Los Angeles, CA | 7% | 42% | 5.8 |
| Albuquerque-Santa Fe, NM | 4% | 53% | 6.1 |
| Denver, CO | 3% | 30% | 5.4 |
| Yuma, AZ-El Centro, CA | 2% | 79% | 3.3 |
| Las Vegas, NV | 2% | 44% | 5.8 |
| Salt Lake City, UT | 2% | 42% | 6.0 |
| El Paso, TX | 2% | 54% | 6.2 |
| Chicago, IL | 2% | 23% | 5.6 |

2022 VISITATION SUMMARY

TRIPS TO PINAL COUNTY BY MONTH



2022 VISITATION SUMMARY

TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | PINAL COUNTY

| Origin DMA | Visitor Share | Repeat Visitor Ratio | Average Time in Destination |
|---------------------------|---------------|----------------------|-----------------------------|
| Phoenix, AZ | 47% | 76% | 3.6 |
| Tucson (Sierra Vista), AZ | 15% | 91% | 2.4 |
| Los Angeles, CA | 3% | 67% | 5.3 |
| El Paso, TX | 2% | 85% | 4.1 |
| Albuquerque-Santa Fe, NM | 1% | 77% | 5.5 |
| Minneapolis-St. Paul, MN | 1% | 58% | 6.3 |
| Dallas-Ft. Worth, TX | 1% | 73% | 5.0 |
| San Diego, CA | 1% | 71% | 4.6 |
| Denver, CO | 1% | 61% | 5.7 |
| Yuma, AZ-El Centro, CA | 1% | 89% | 2.9 |

THANKS!



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