

SOUTHERN ARIZONA REGION

# 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**

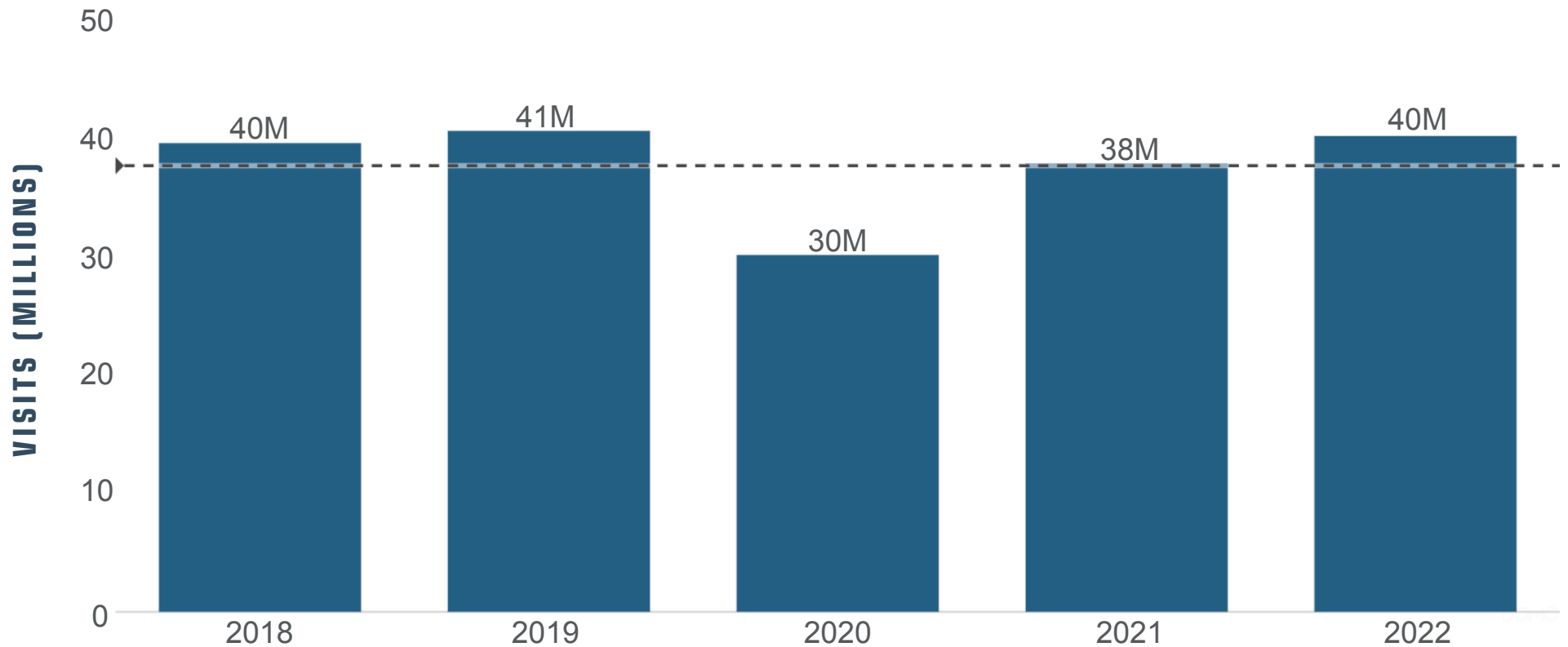
TRAVEL SPENDING

2022 vs 2019

**+10%**



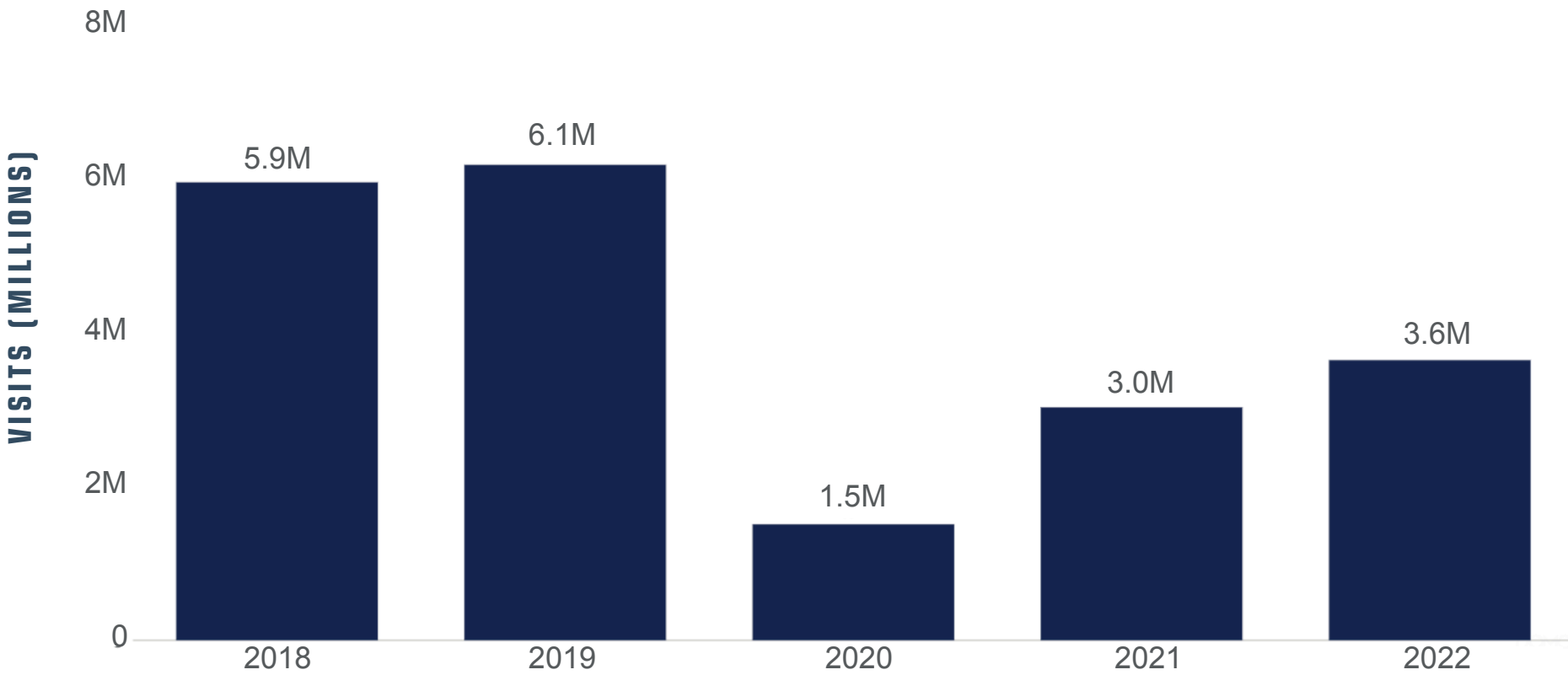
# DOMESTIC OVERNIGHT VISITATION



**AVERAGE: 38**

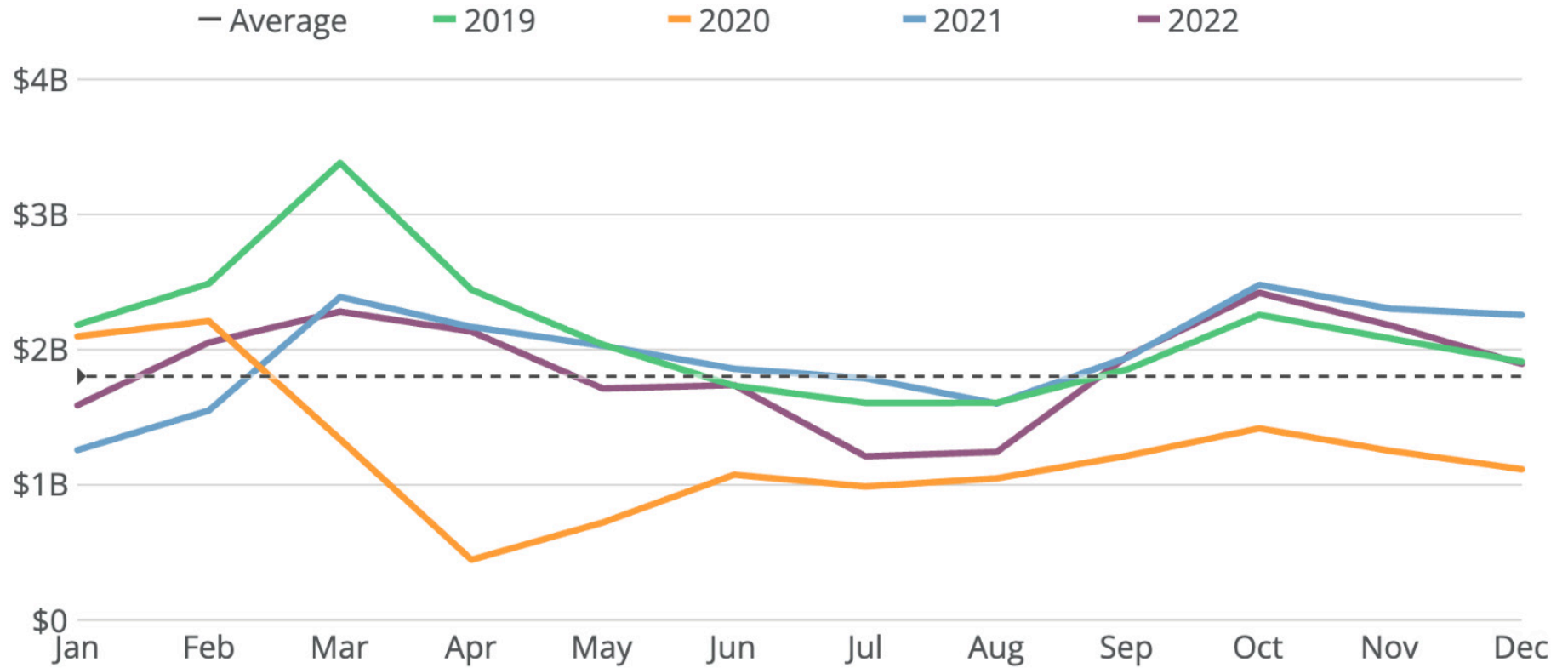
Source: Tourism Economics

# INTERNATIONAL VISITATION



Source: Tourism Economics

# TRAVEL SPENDING TREND

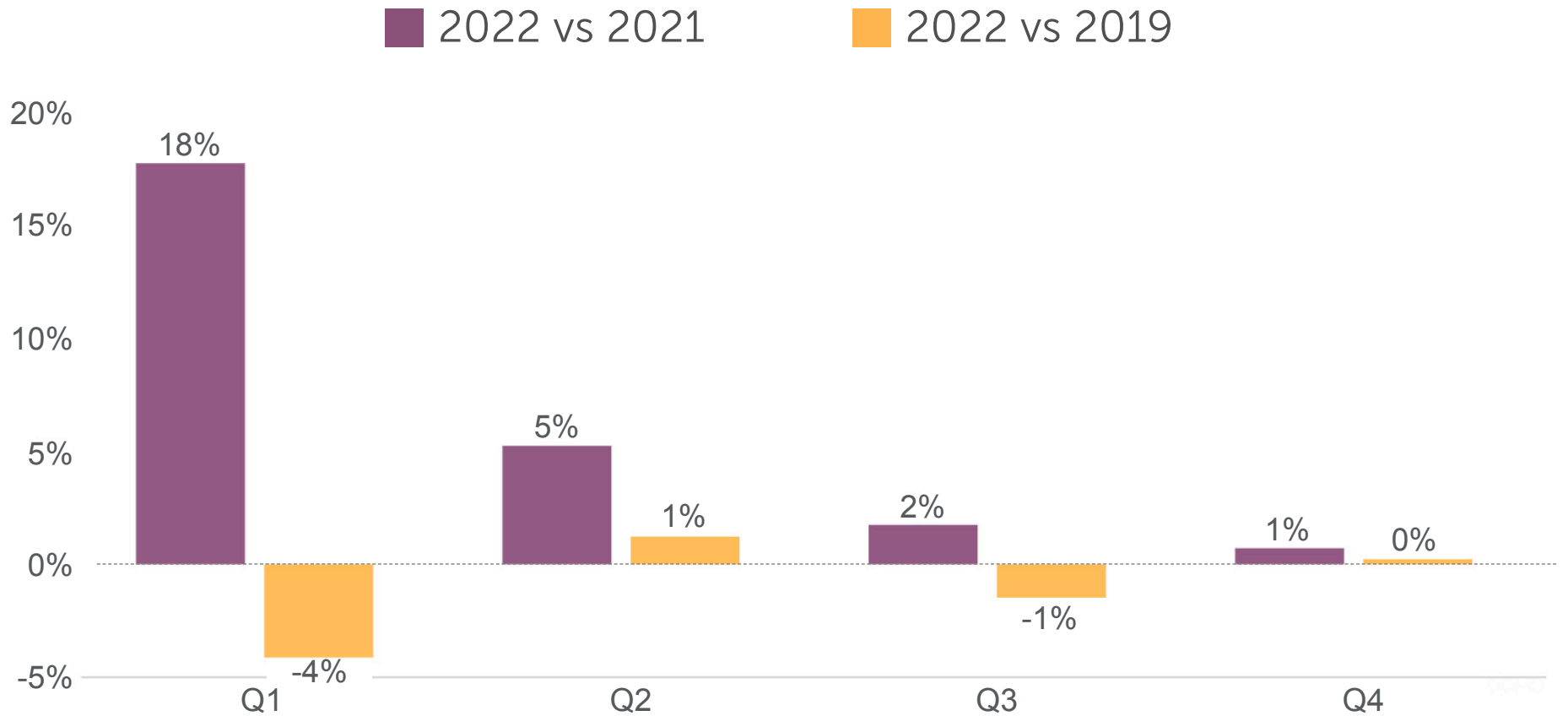


**AVERAGE: \$1.80B**

Source: Dean Runyan Associates

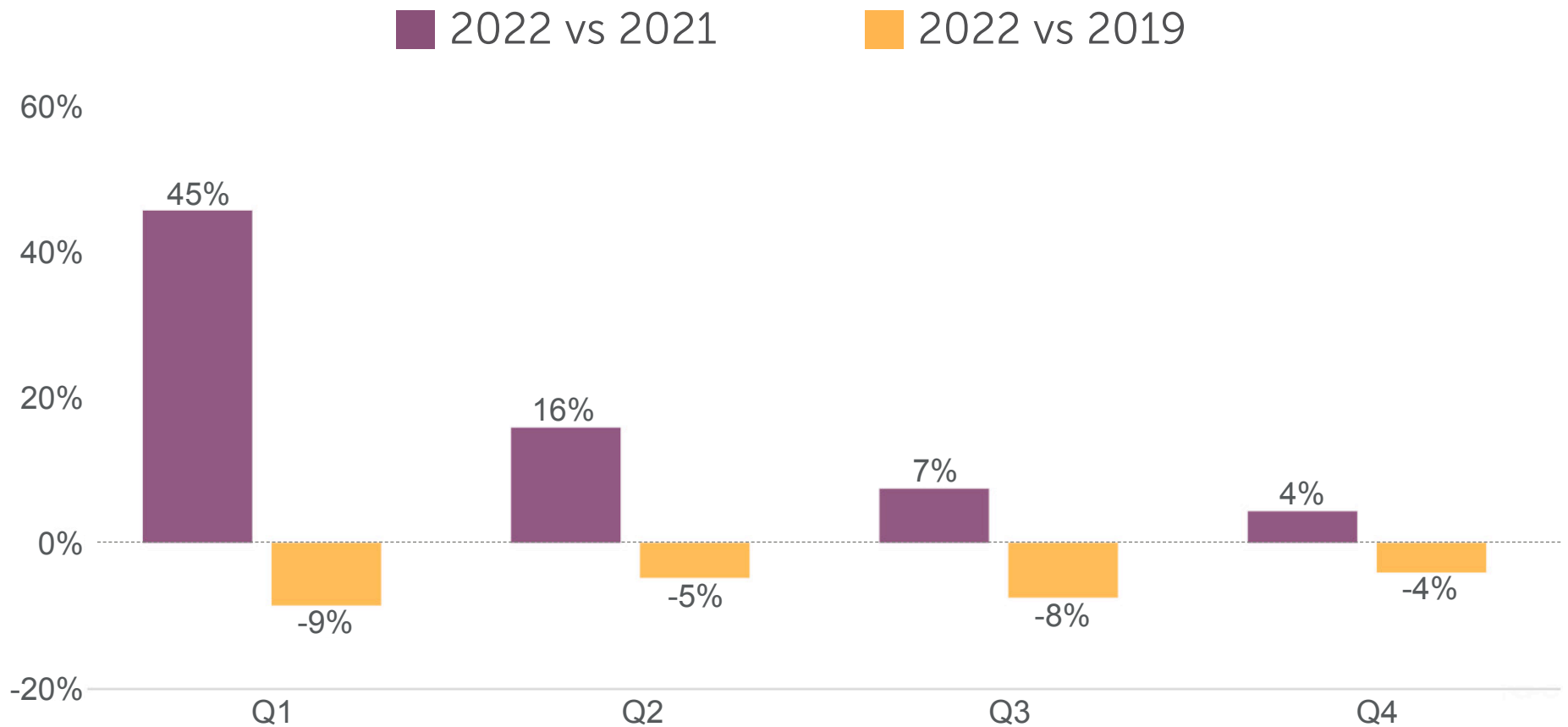
# DOMESTIC OVERNIGHT VISITATION - % CHANGE

## TOTAL



# DOMESTIC OVERNIGHT VISITATION - % CHANGE

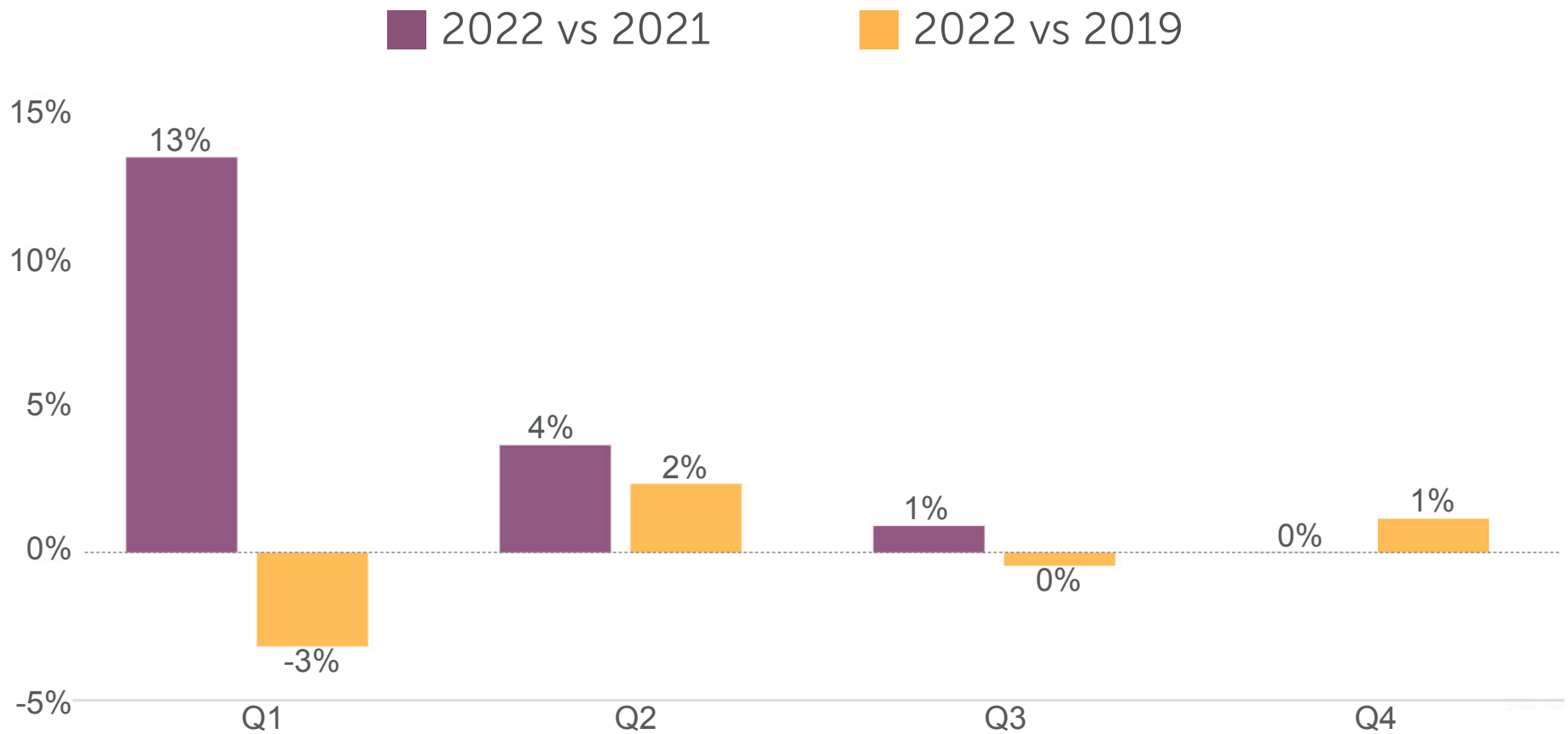
## BUSINESS





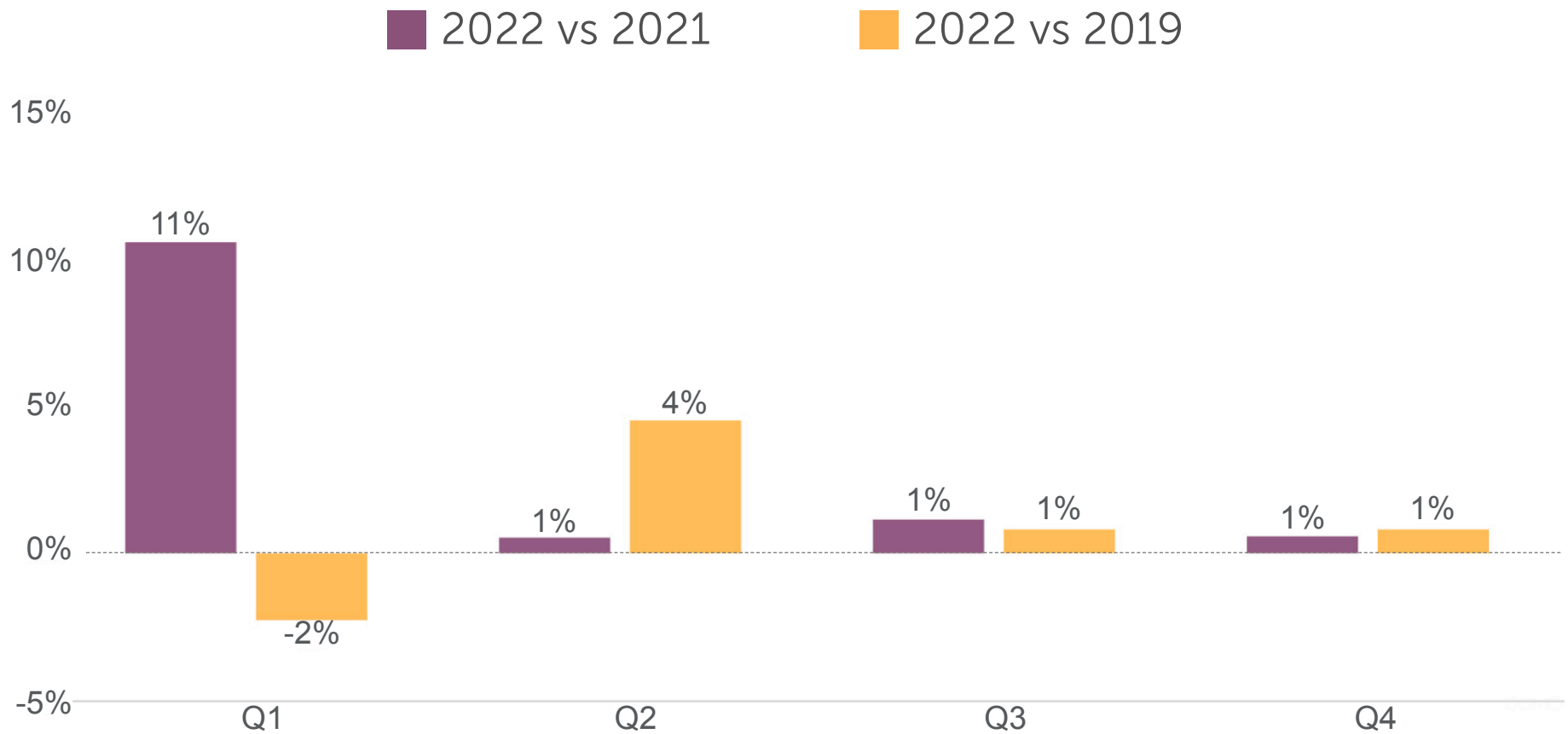
# DOMESTIC OVERNIGHT VISITATION - % CHANGE

## LEISURE



# DOMESTIC OVERNIGHT VISITATION - % CHANGE

## RESIDENT



# VISITOR SPENDING BY COUNTY

**COCHISE**

**\$386M**

2022 VS 2021

**+14.3%**

**GRAHAM**

**\$77.9M**

2022 VS 2021

**+16.6%**

**GREENLEE**

**\$16M**

2022 VS 2021

**+15.7%**

**PIMA**

**\$3.27M**

2022 VS 2021

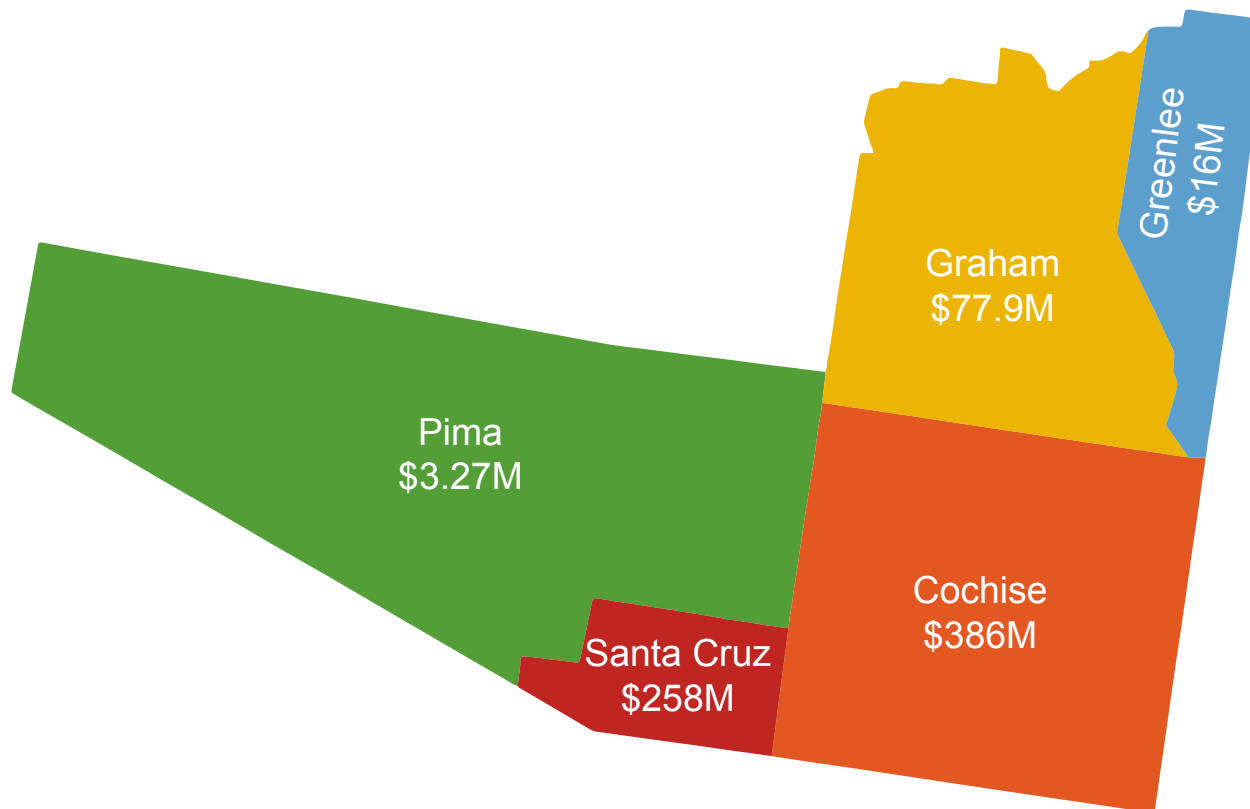
**+17.5%**

**SANTA  
CRUZ**

**\$258M**

2022 VS 2021

**+35.1%**



Source: Arizona Travel Impacts, Dean Runyan Associates

# TRAVEL IMPACTS

## COCHISE

DIRECT TRAVEL SPENDING

**+\$48.4M**

2022 VS 2021

**+14.3%**

LOCAL TAX RECEIPTS

**+\$1,834,692**

2022 VS 2021

**+12.5%**

EMPLOYMENT (JOBS)

**+280**

2022 VS 2021

**+8.7%**

ACCOMMODATIONS SPENDING

**+7.2M**

2022 VS 2021

**+5.5%**

FOOD SERVICE SPENDING

**+\$10,116,707**

2022 VS 2021

**+10.6%**

EARNINGS

**+\$10.9M**

2022 VS 2021

**+12.1%**

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

# TRAVEL IMPACTS

## GRAHAM

DIRECT TRAVEL SPENDING

**+\$11M**

2022 VS 2021

**+16.6%**

LOCAL TAX RECEIPTS

**+\$446.2K**

2022 VS 2021

**+15.3%**

EMPLOYMENT (JOBS)

**+10**

2022 VS 2021

**+1.2%**

ACCOMMODATIONS SPENDING

**+\$4.5M**

2022 VS 2021

**+15.4%**

FOOD SERVICE SPENDING

**+\$2.3M**

2022 VS 2021

**+12.4%**

EARNINGS

**+\$912.8K**

2022 VS 2021

**+5.6%**

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

# TRAVEL IMPACTS

## GREENLEE

DIRECT TRAVEL SPENDING

**+\$2M**

2022 VS 2021

**+15.7%**

LOCAL TAX RECEIPTS

**+\$29.2K**

2022 VS 2021

**+12.5%**

EMPLOYMENT (JOBS)

**0**

2022 VS 2021

**+0.0%**

ACCOMMODATIONS SPENDING

**+\$782.1K**

2022 VS 2021

**+15.0%**

FOOD SERVICE SPENDING

**+\$444.5K**

2022 VS 2021

**+11.2%**

EARNINGS

**+\$146.7K**

2022 VS 2021

**+7.2%**

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

# TRAVEL IMPACTS

## PIMA

DIRECT TRAVEL SPENDING

**+\$487M**

2022 VS 2021

**+17.5%**

LOCAL TAX RECEIPTS

**+\$11.3K**

2022 VS 2021

**+16.3%**

EMPLOYMENT (JOBS)

**+2K**

2022 VS 2021

**+7.8%**

ACCOMMODATIONS SPENDING

**+\$206.5M**

2022 VS 2021

**+17.8%**

FOOD SERVICE SPENDING

**+\$70.0M**

2022 VS 2021

**+9.6%**

EARNINGS

**+\$102.3K**

2022 VS 2021

**+14.4%**

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

# TRAVEL IMPACTS

## SANTA CRUZ

DIRECT TRAVEL SPENDING

**+\$67M**

2022 VS 2021

**+35.1%**

LOCAL TAX RECEIPTS

**+\$1.9M**

2022 VS 2021

**+27.2%**

EMPLOYMENT (JOBS)

**+120**

2022 VS 2021

**+6.3%**

ACCOMMODATIONS SPENDING

**+\$6.9M**

2022 VS 2021

**+17.5%**

FOOD SERVICE SPENDING

**+\$9.9M**

2022 VS 2021

**+24.3%**

EARNINGS

**+\$102.3**

2022 VS 2021

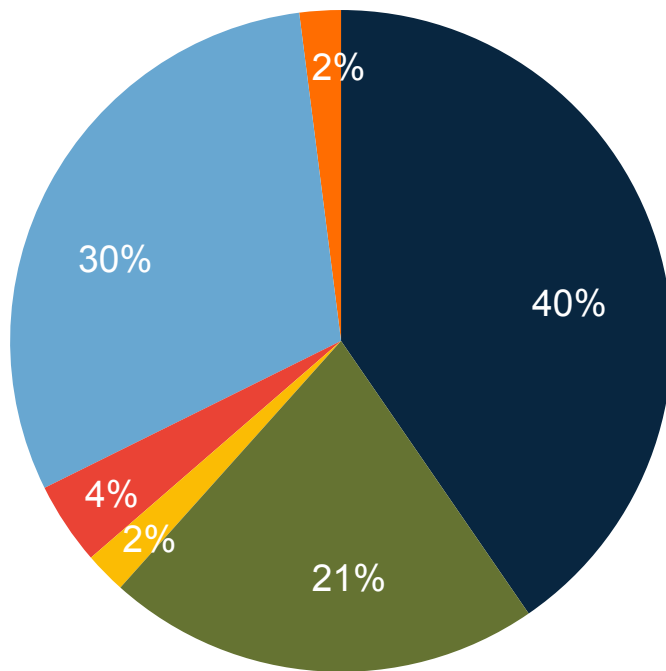
**+16.4%**

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

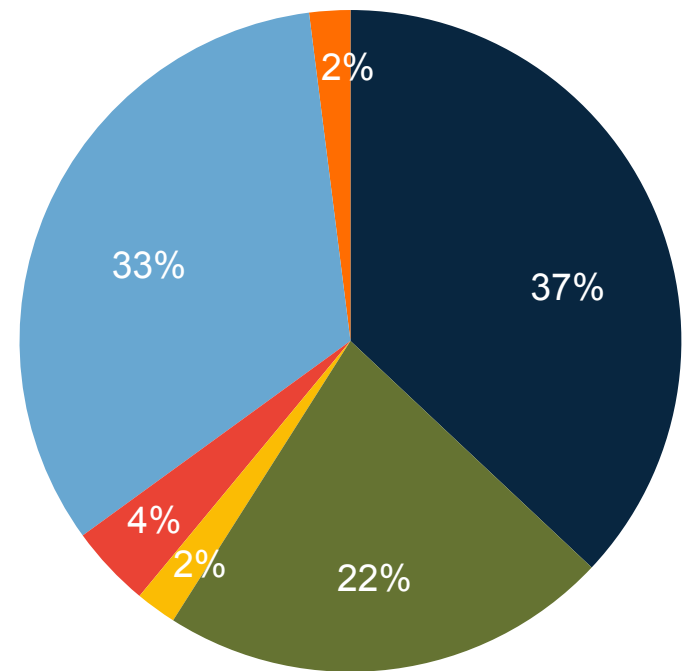


# SPENDING BY ACCOMMODATION CHOICE

## COCHISE COUNTY 2021



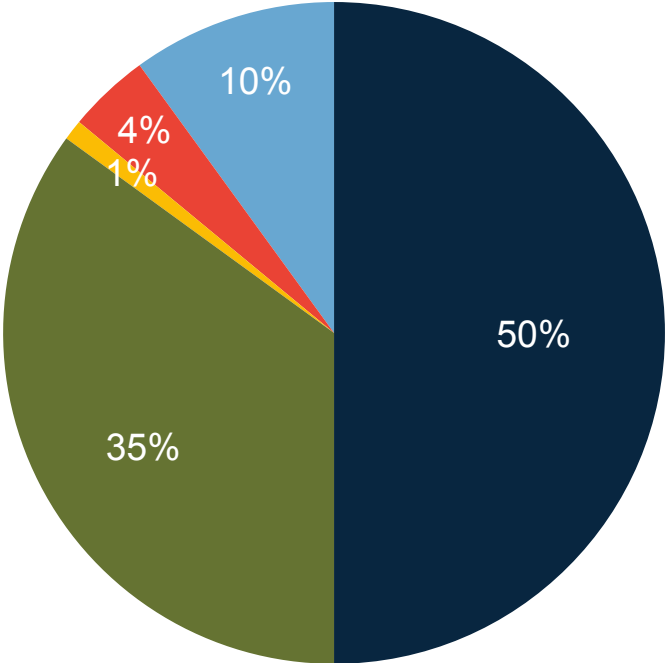
## COCHISE COUNTY 2022



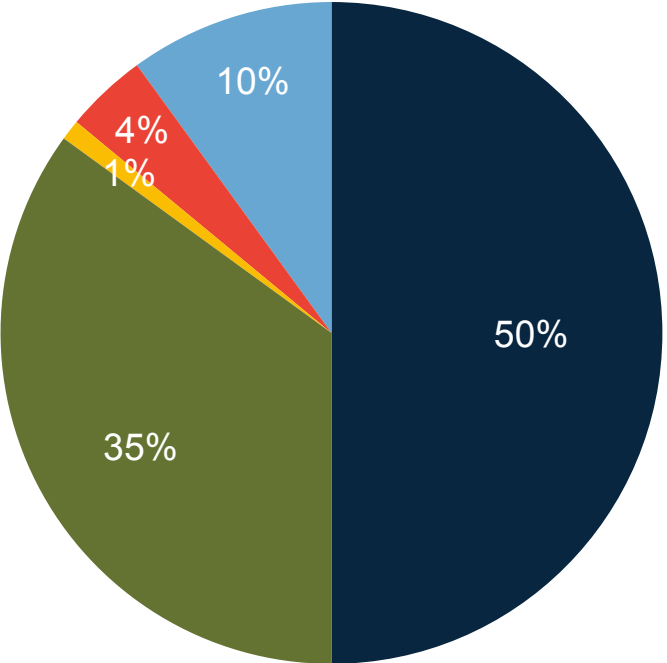
- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

# SPENDING BY ACCOMMODATION CHOICE

## GRAHAM COUNTY 2021



## GRAHAM COUNTY 2022

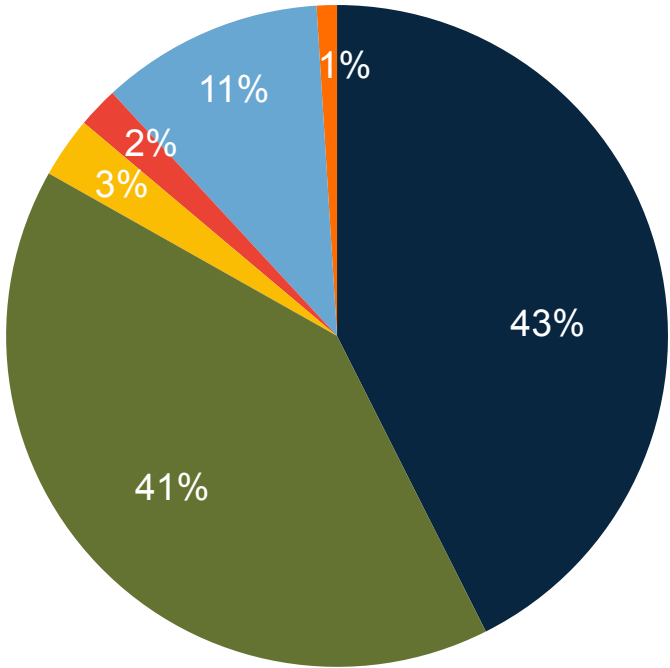


- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

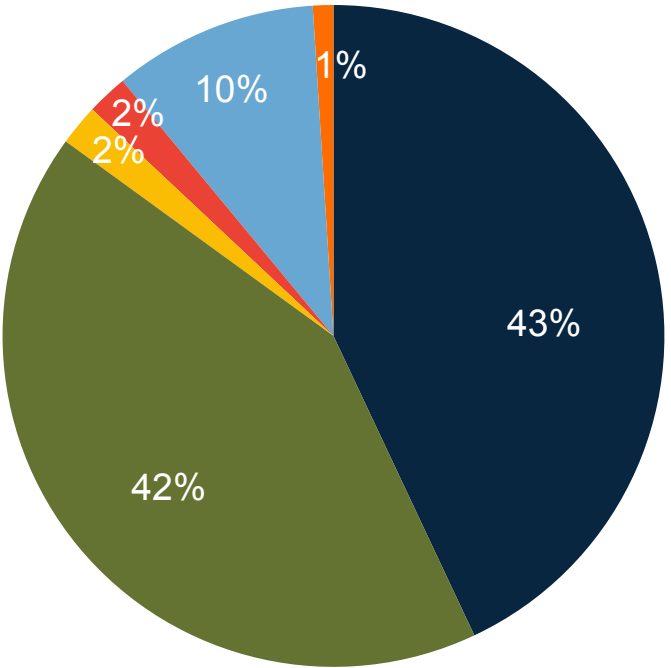
Source: Arizona Travel Impacts, Dean Runyan Associates \*STVR stands for Short-Term Vacation Rental

# SPENDING BY ACCOMMODATION CHOICE

## GREENLEE COUNTY 2021



## GREENLEE COUNTY 2022

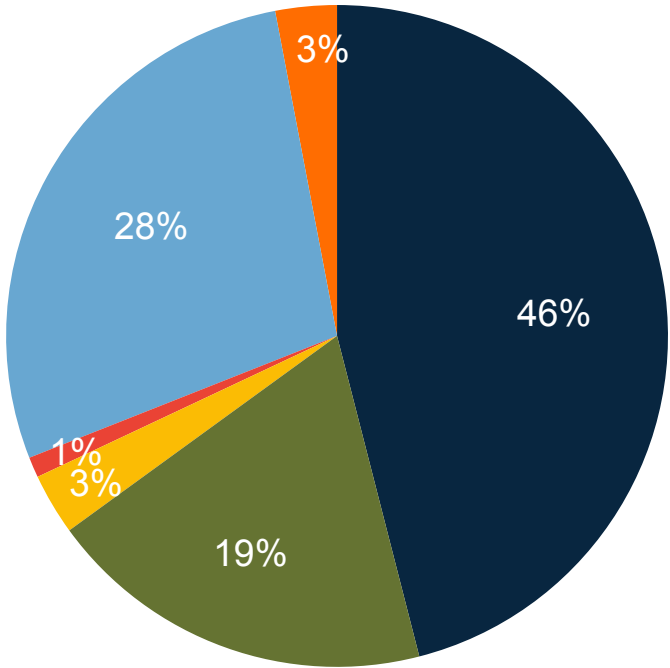


- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

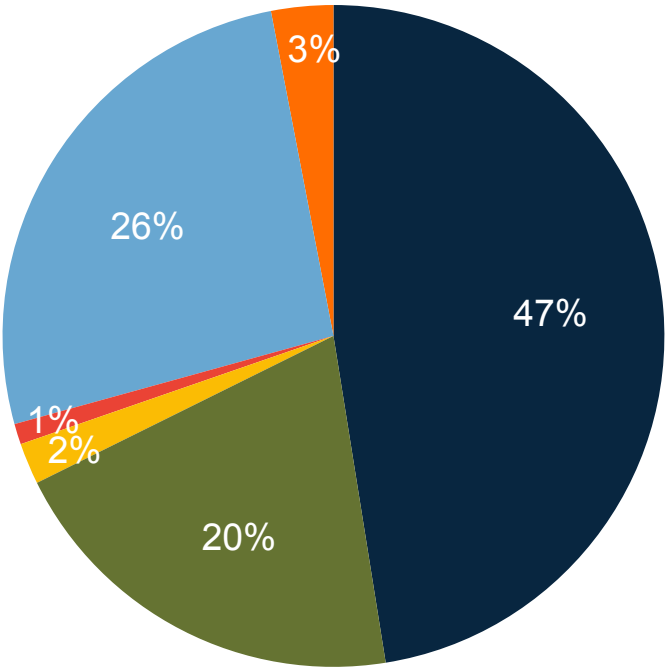
Source: Arizona Travel Impacts, Dean Runyan Associates \*STVR stands for Short-Term Vacation Rental

# SPENDING BY ACCOMMODATION CHOICE

## PIMA COUNTY 2021



## PIMA COUNTY 2022

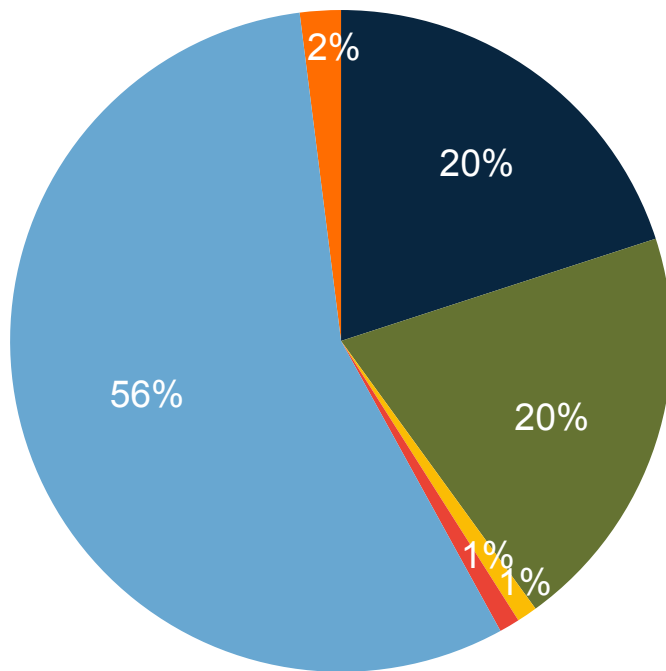


- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

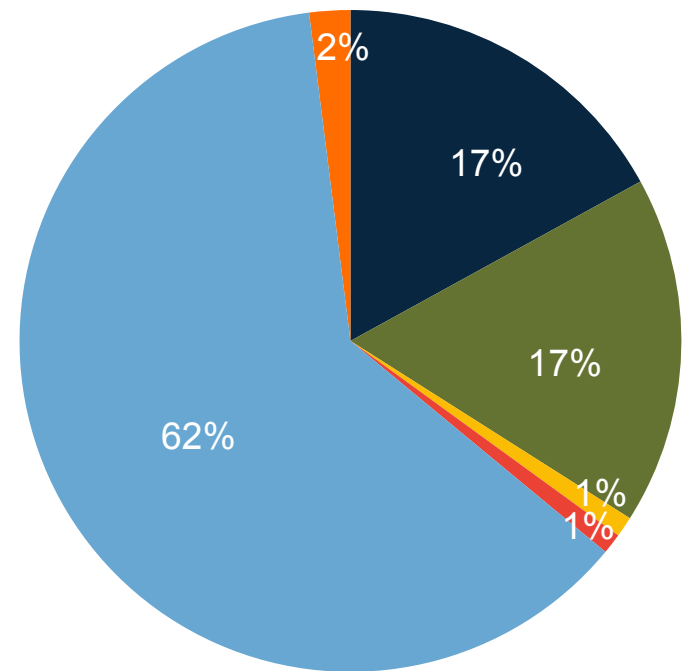
Source: Arizona Travel Impacts, Dean Runyan Associates \*STVR stands for Short-Term Vacation Rental

# SPENDING BY ACCOMMODATION CHOICE

## SANTA CRUZ COUNTY 2021



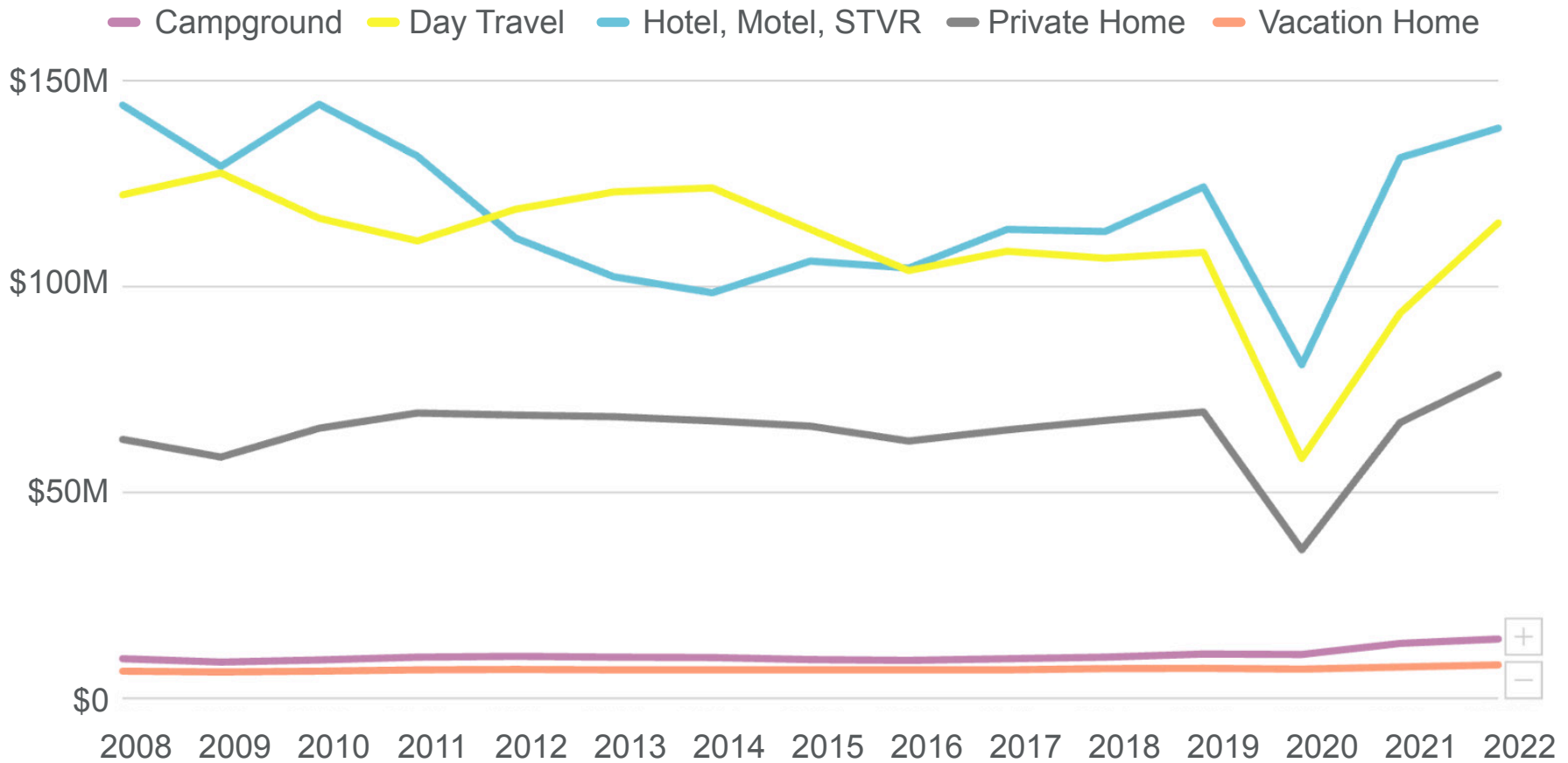
## SANTA CRUZ COUNTY 2022



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

# SPENDING BY ACCOMMODATION CHOICE

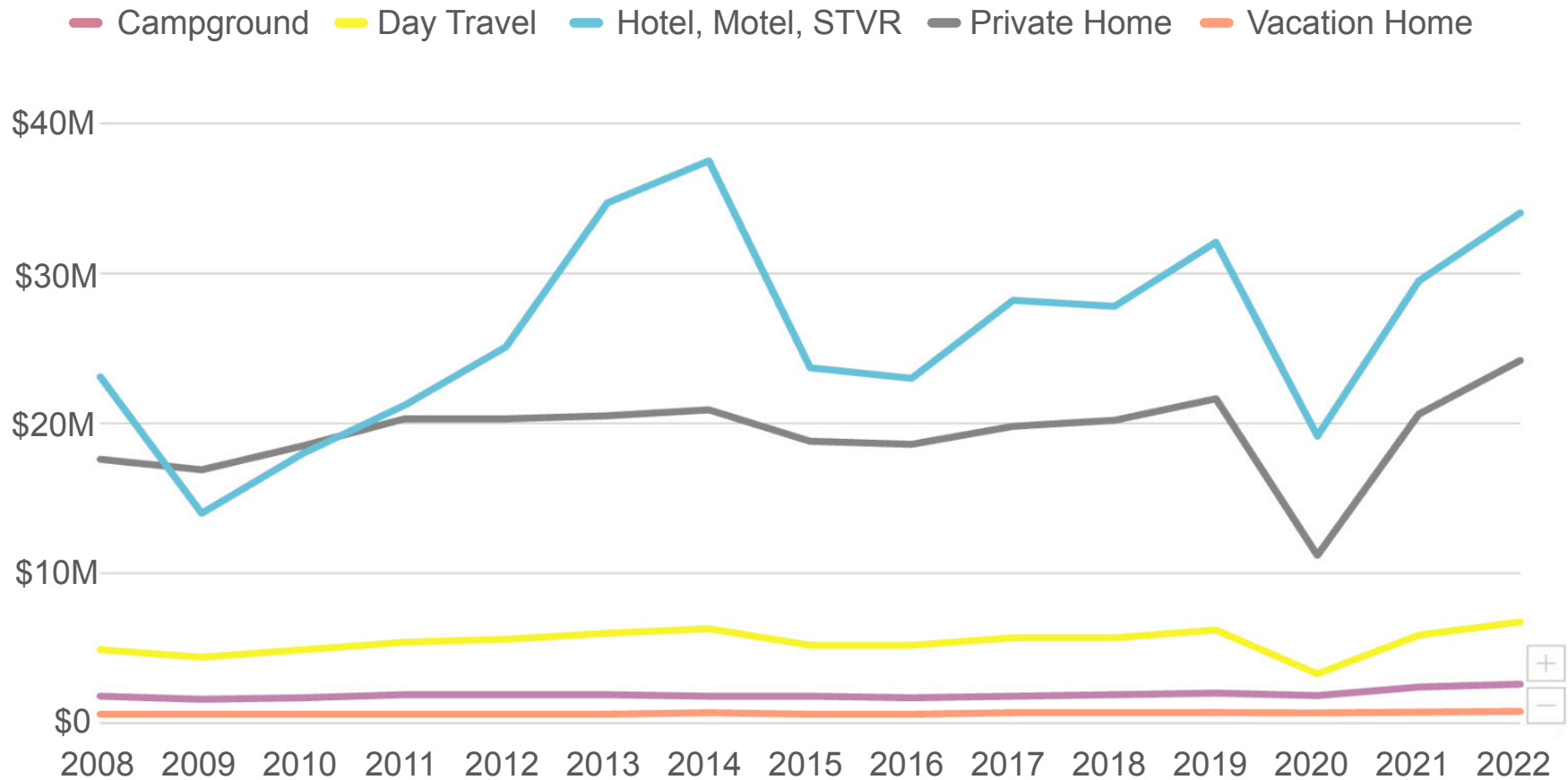
## COCHISE COUNTY



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

# SPENDING BY ACCOMMODATION CHOICE

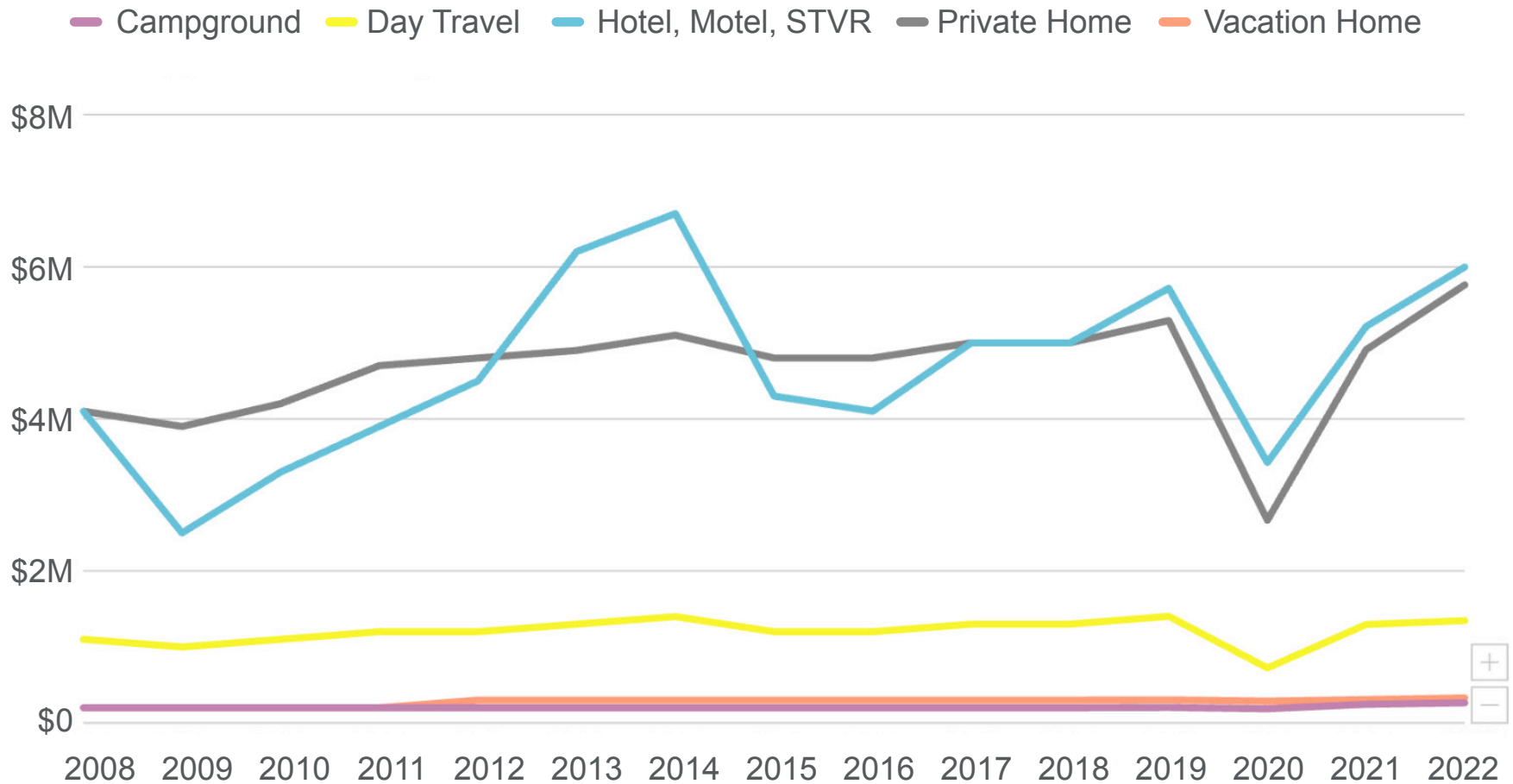
## GRAHAM COUNTY



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

# SPENDING BY ACCOMMODATION CHOICE

## GREENLEE COUNTY

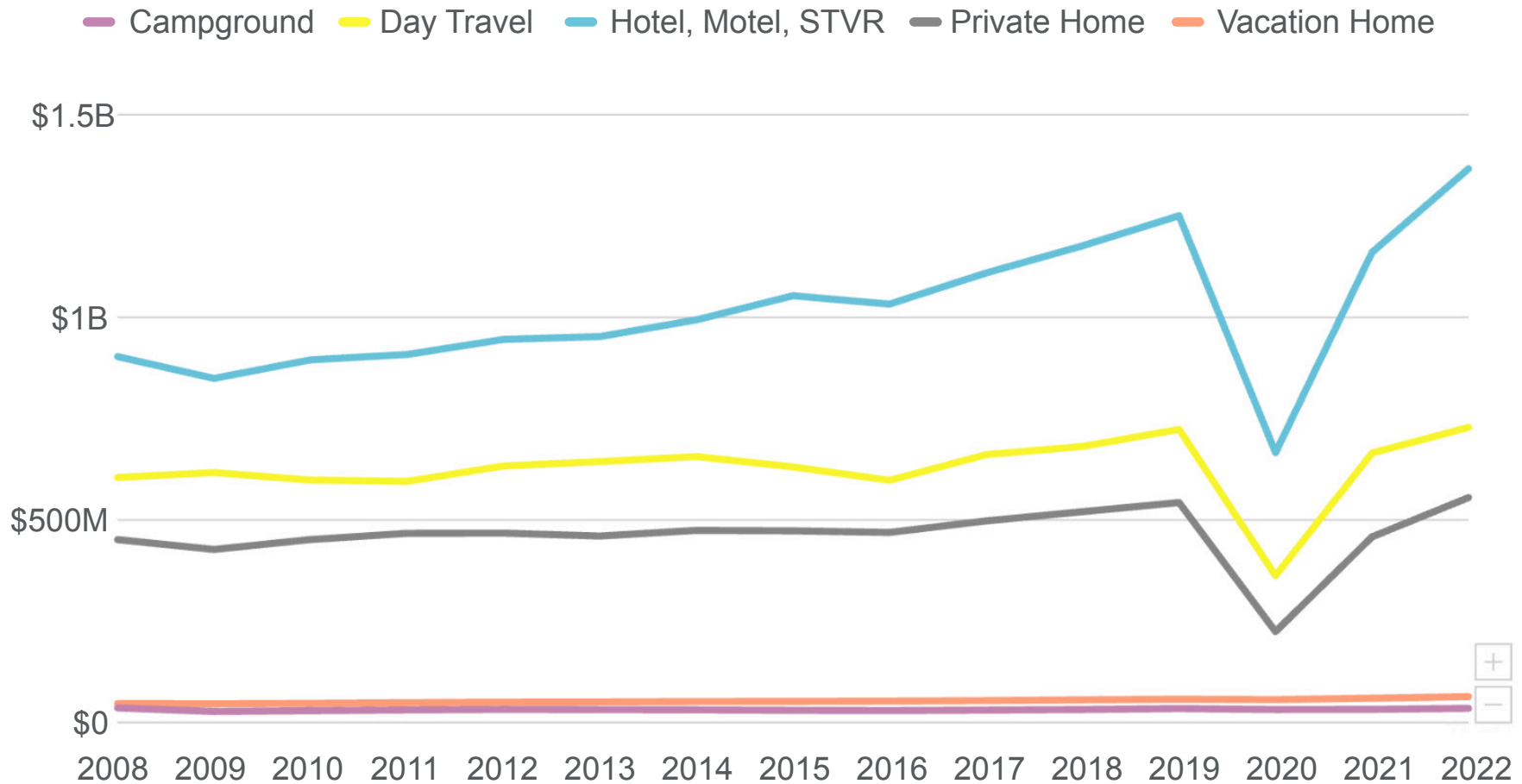


Source: Arizona Travel Impacts, Dean Runyan Associates \*STVR stands for Short-Term Vacation Rental



# SPENDING BY ACCOMMODATION CHOICE

## PIMA COUNTY

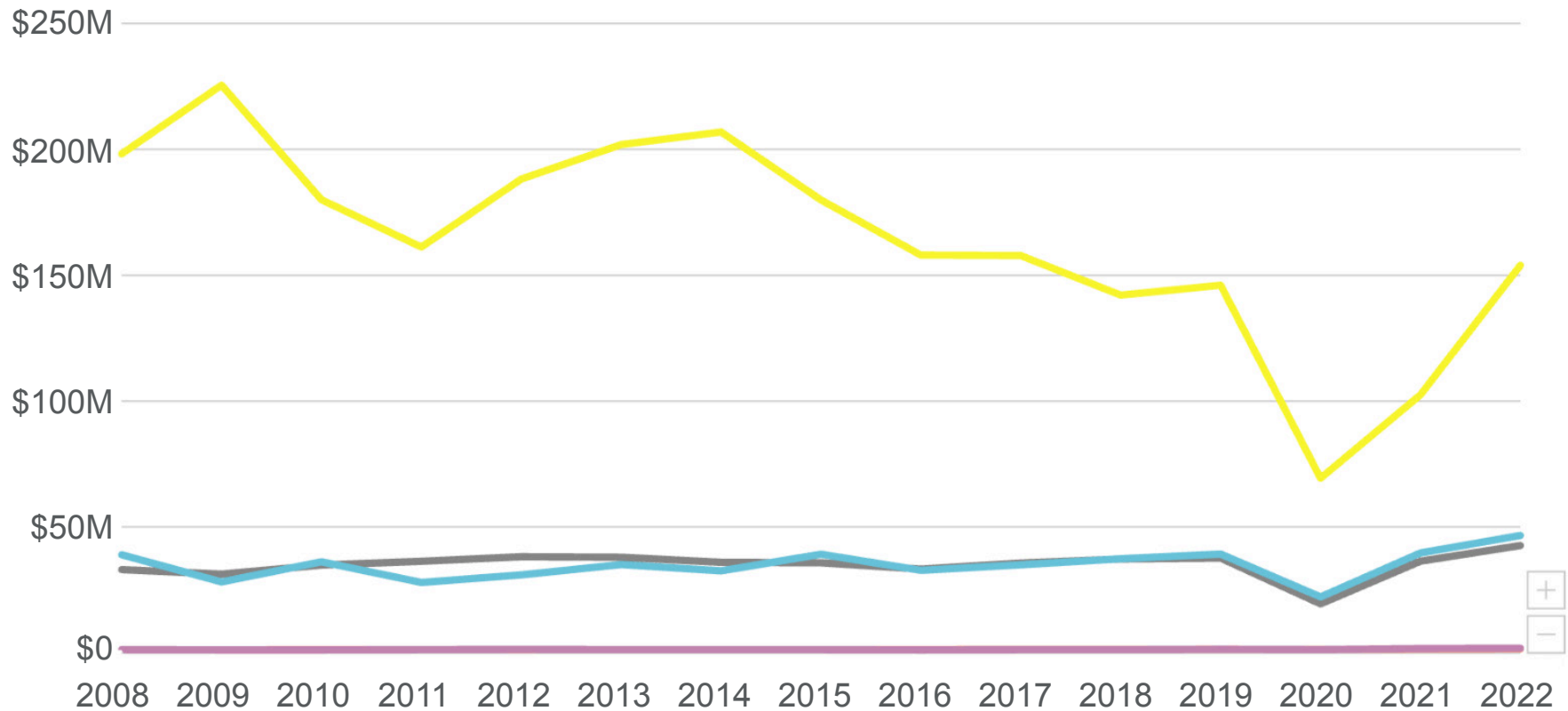


Source: Arizona Travel Impacts, Dean Runyan Associates \*STVR stands for Short-Term Vacation Rental

# SPENDING BY ACCOMMODATION CHOICE

## SANTA CRUZ COUNTY

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

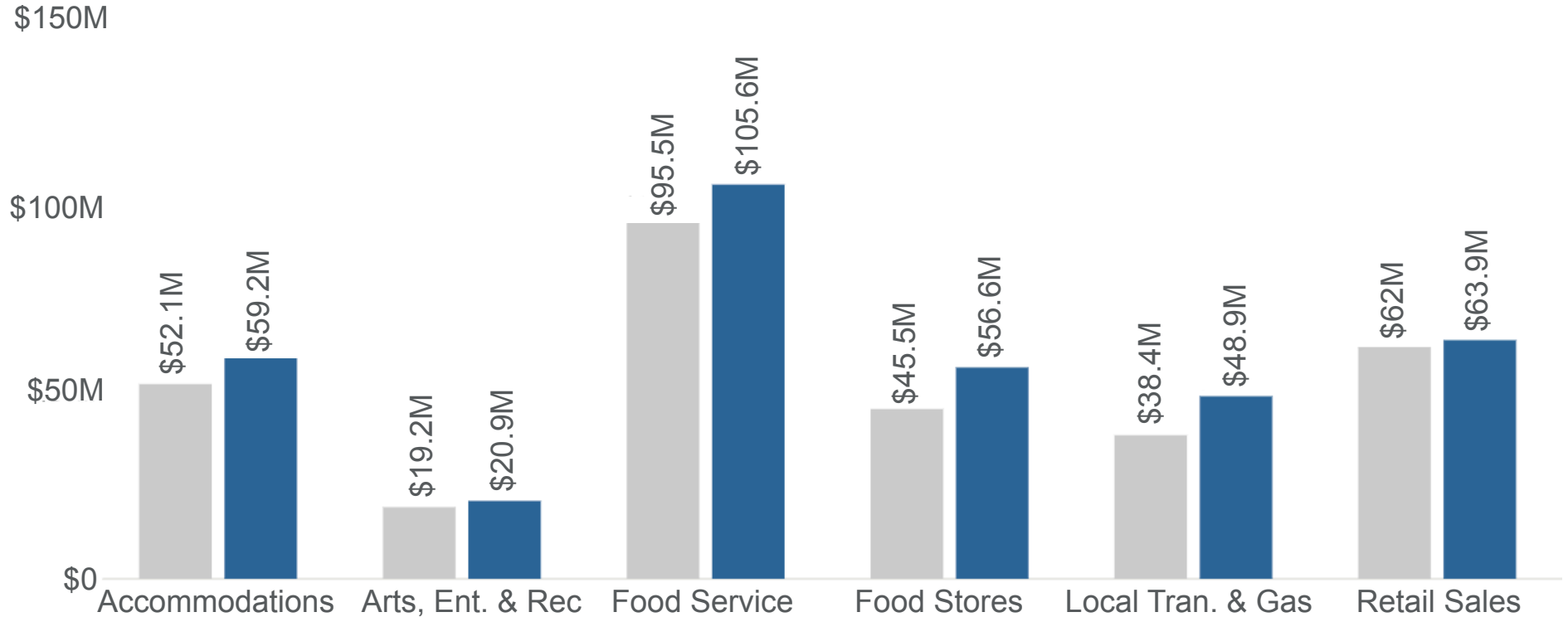


Source: Arizona Travel Impacts, Dean Runyan Associates \*STVR stands for Short-Term Vacation Rental

# SPENDING BY COMMODITY PURCHASE

## COCHISE COUNTY

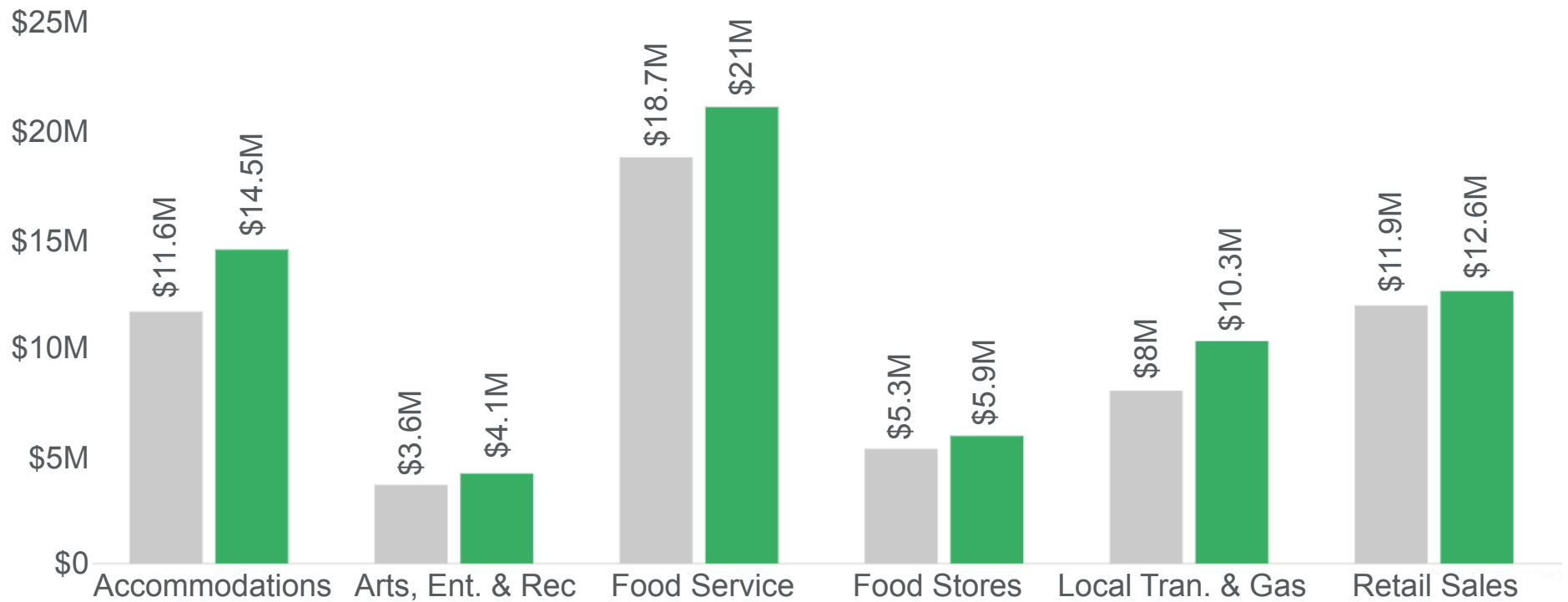
■ 2021 ■ 2022



# SPENDING BY COMMODITY PURCHASE

## GRAHAM COUNTY

■ 2021 ■ 2022



# SPENDING BY COMMODITY PURCHASE

## GREENLEE COUNTY

2021

2022



# SPENDING BY COMMODITY PURCHASE

## PIMA COUNTY

2021 2022



# SPENDING BY COMMODITY PURCHASE

## SANTA CRUZ COUNTY

2021 2022

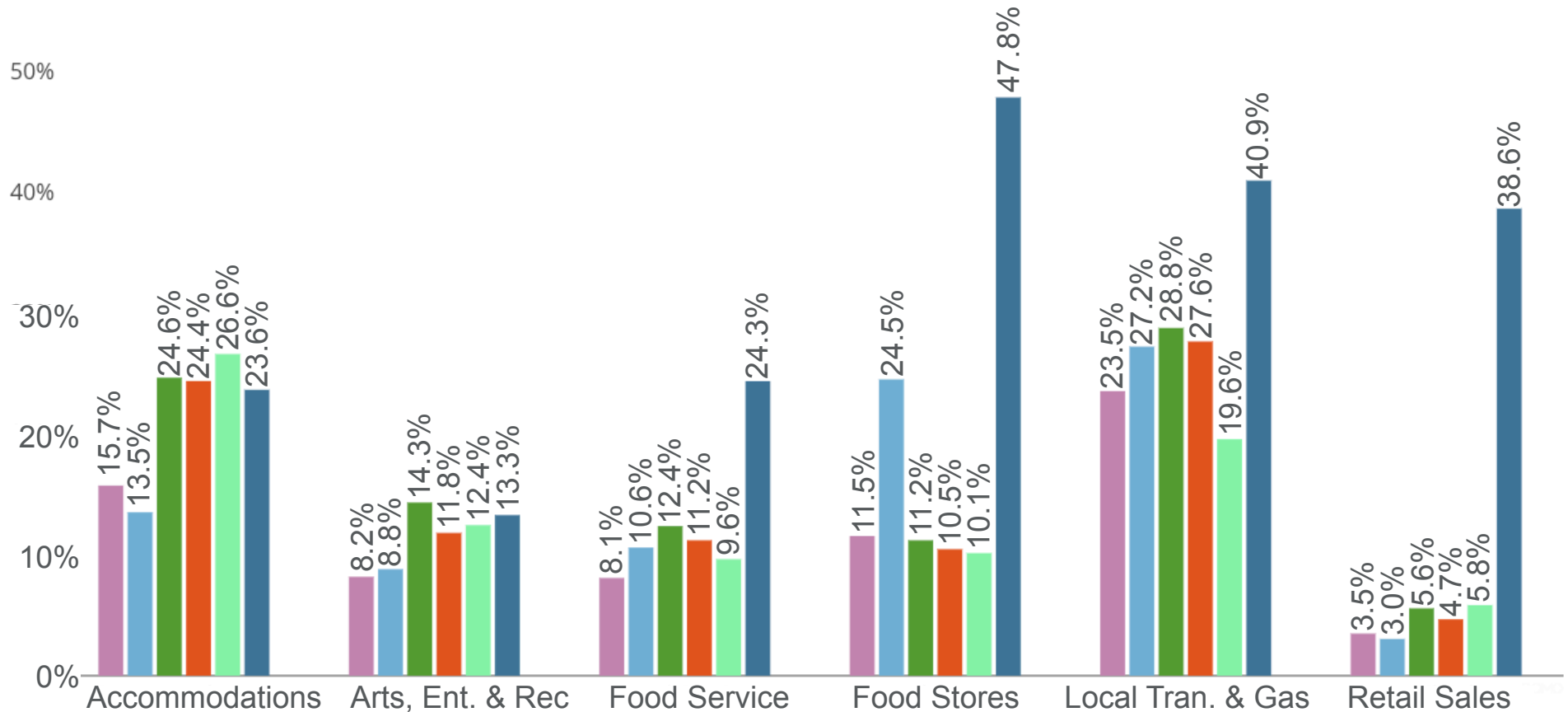


Source: Arizona Travel Impacts, Dean Runyan Associates

# SPENDING BY COMMODITY PURCHASE

## ALL COUNTIES

Arizona Cochise Graham Greenlee Pima Santa Cruz



Source: Arizona Travel Impacts, Dean Runyan Associates

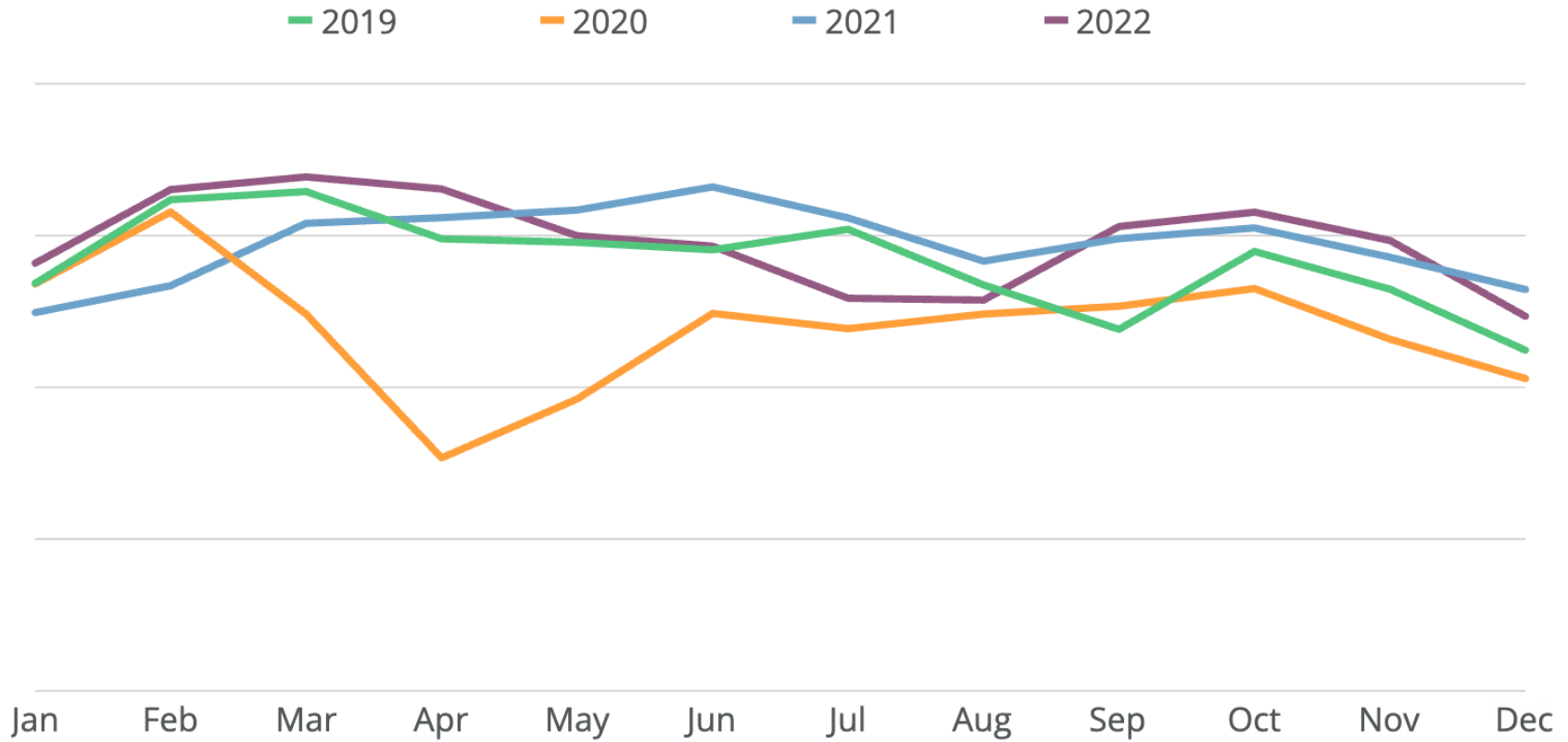


# TOURISM INDICATORS

2022  
SOUTHERN REGION

# LODGING OCCUPANCY

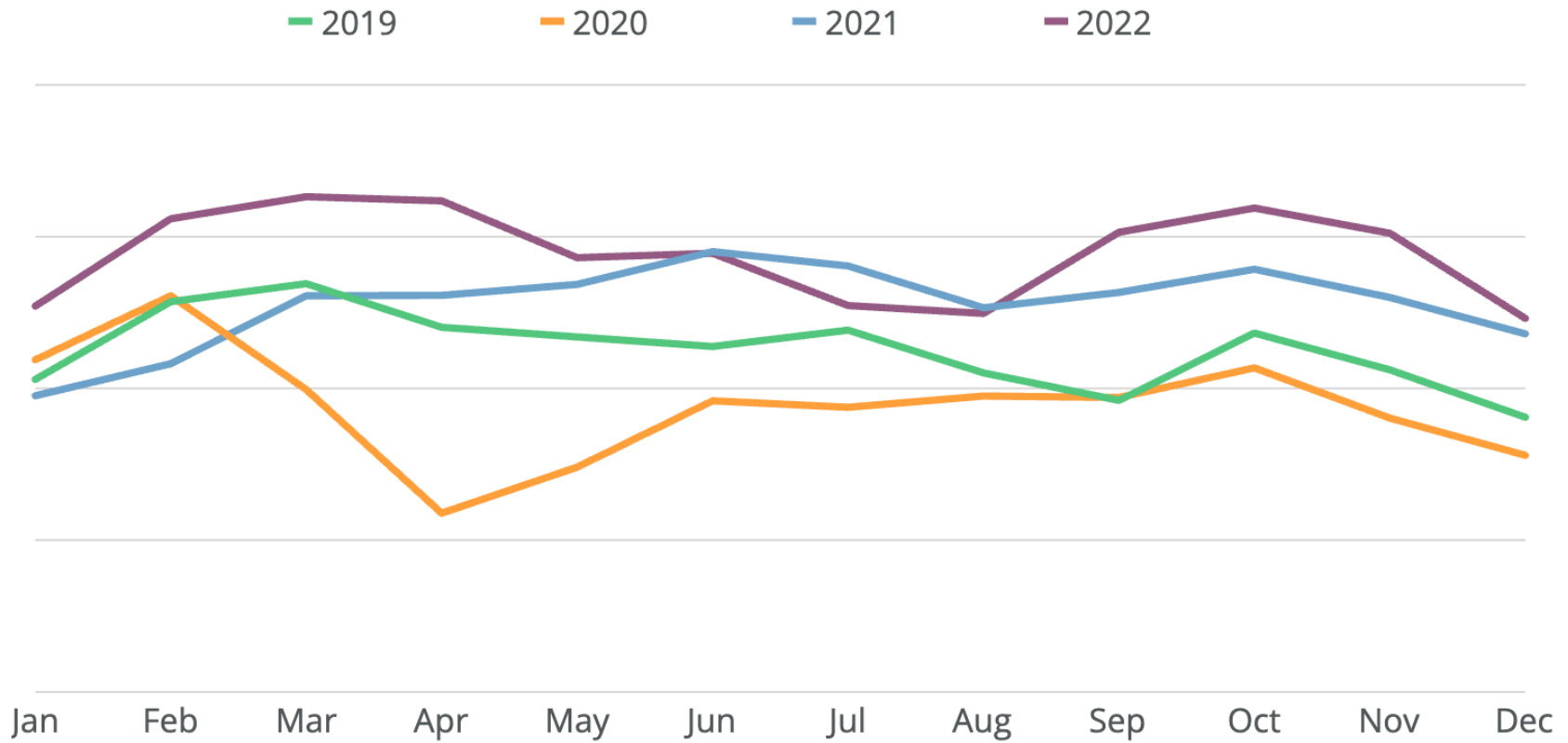
## COCHISE COUNTY



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

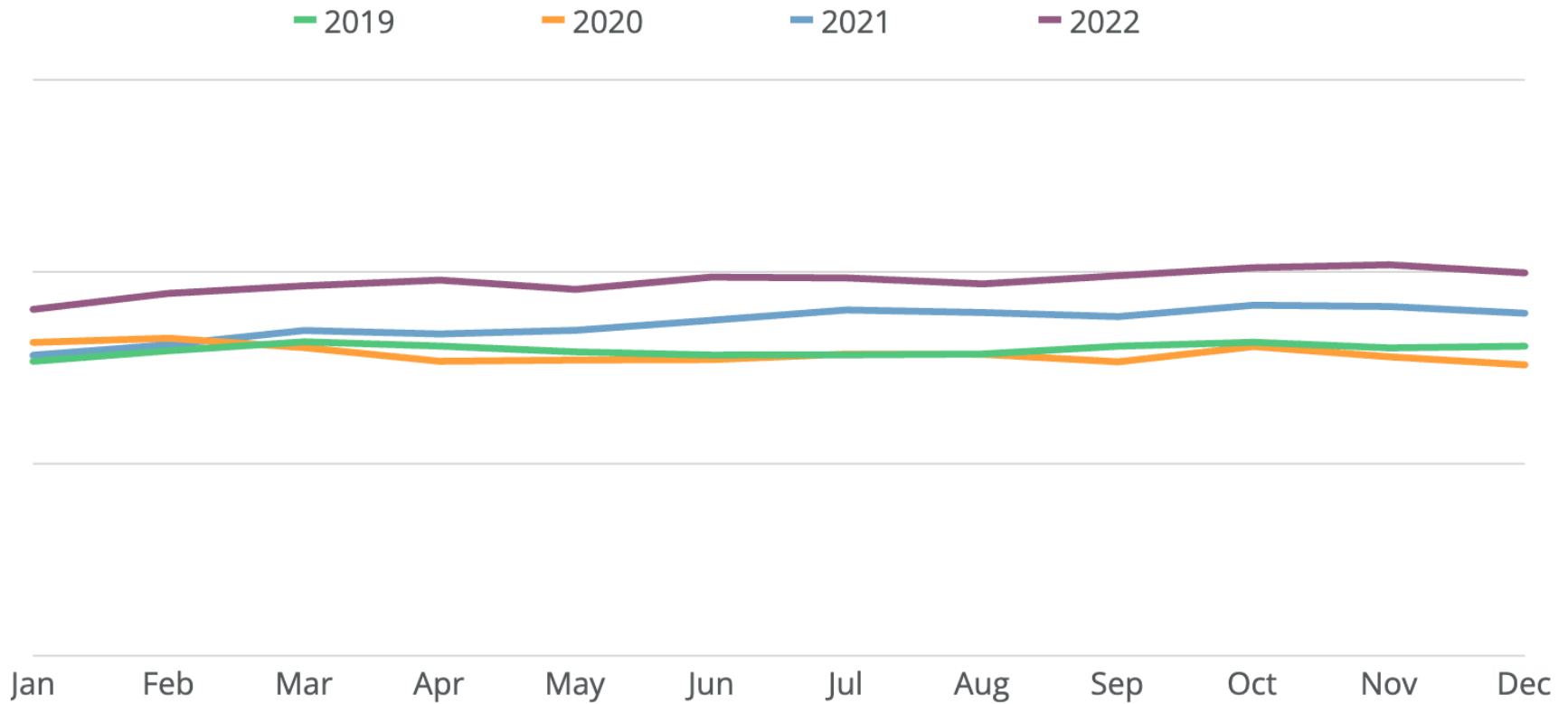
## COCHISE COUNTY



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

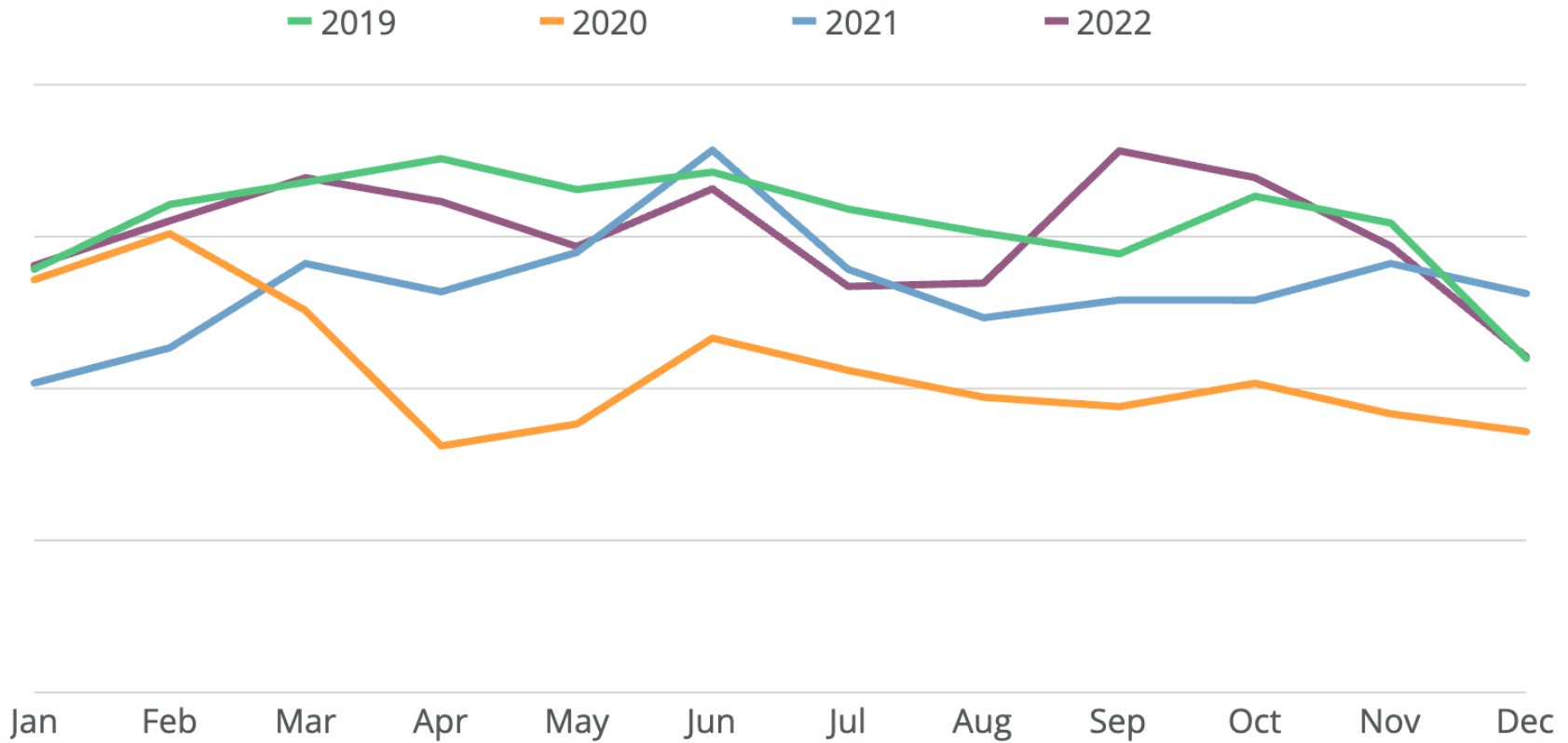
## COCHISE COUNTY



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

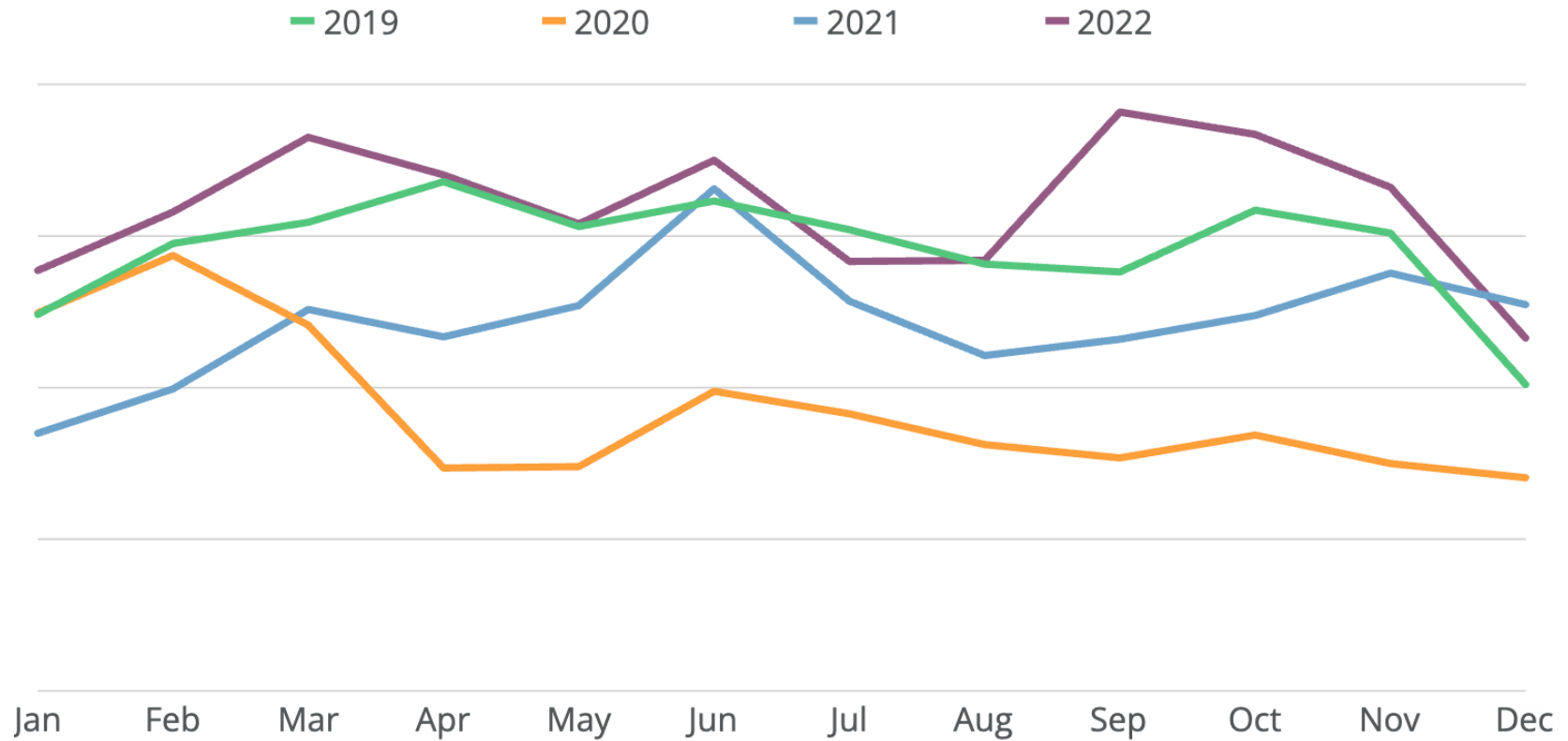
## GRAHAM COUNTY



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

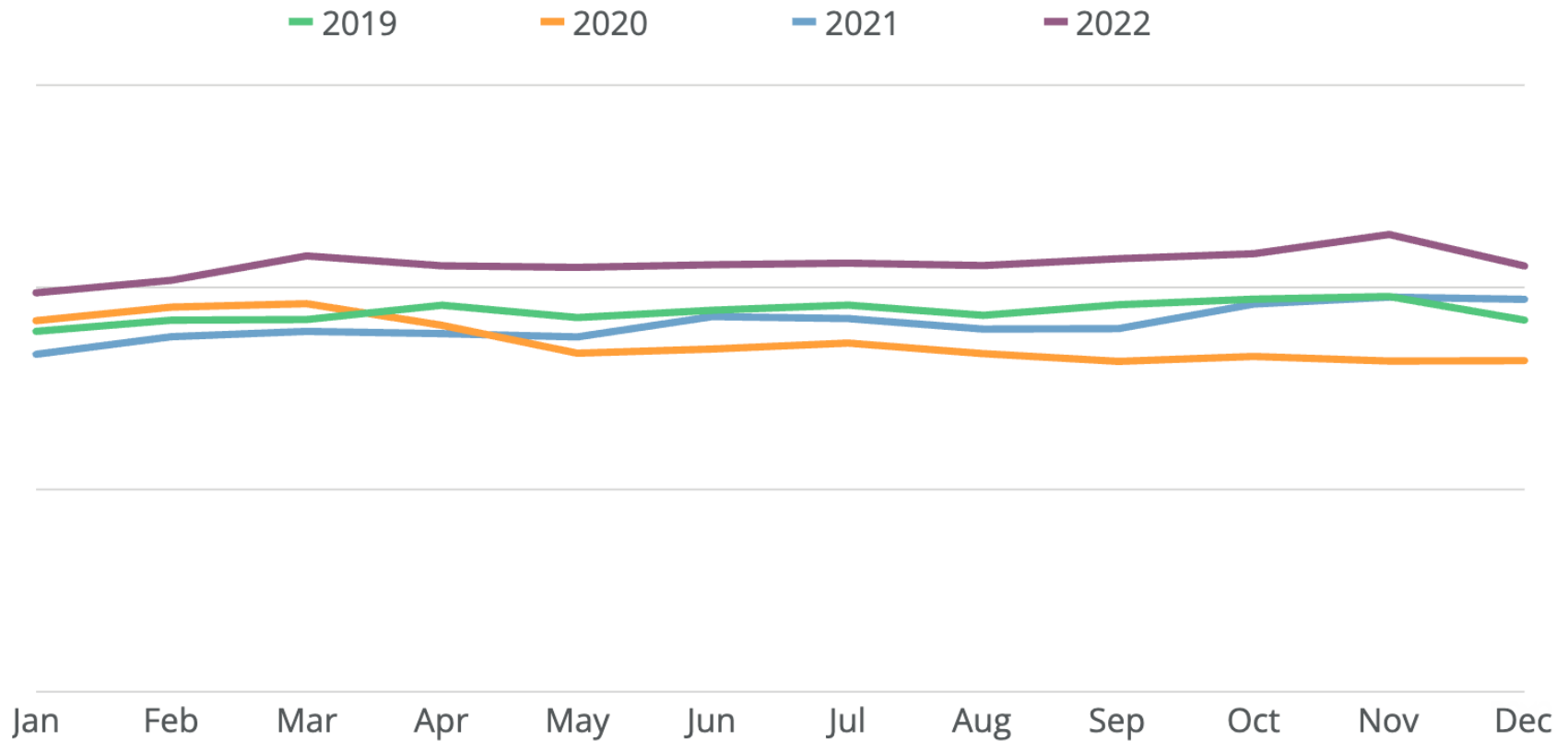
## GRAHAM COUNTY



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

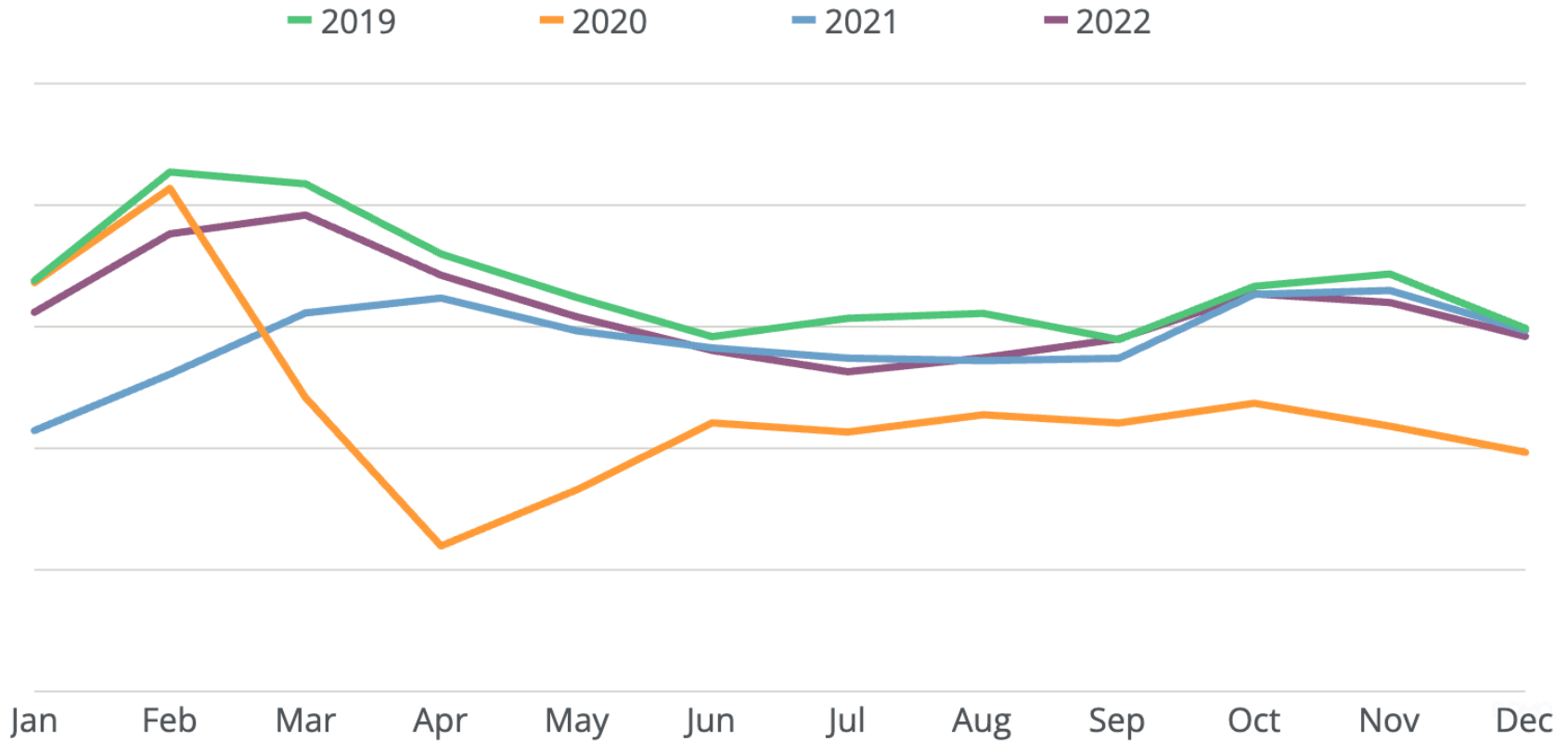
## GRAHAM COUNTY



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

## PIMA COUNTY

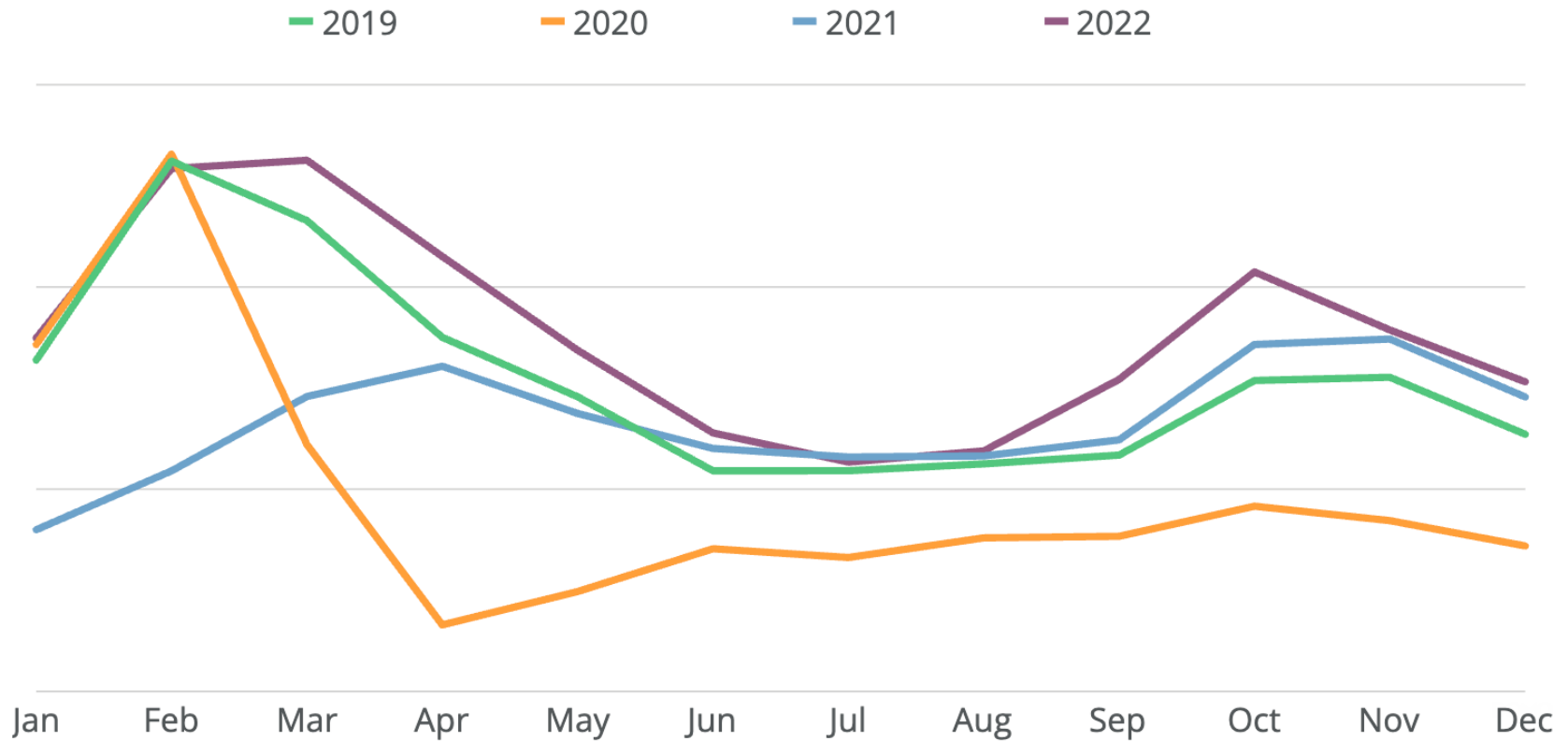


Source: Source: Smith Travel Research, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.



# LODGING REVPAR

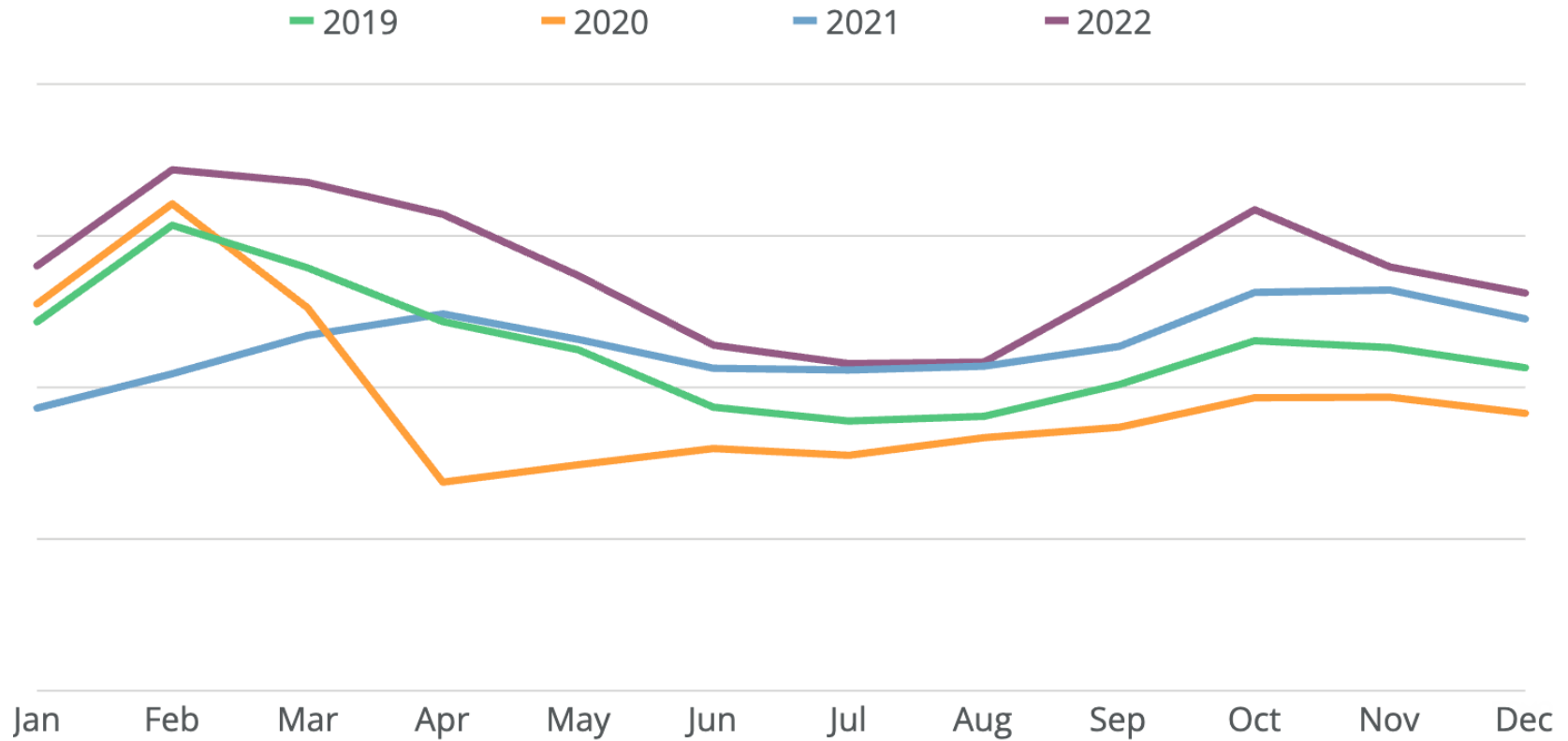
## PIMA COUNTY



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

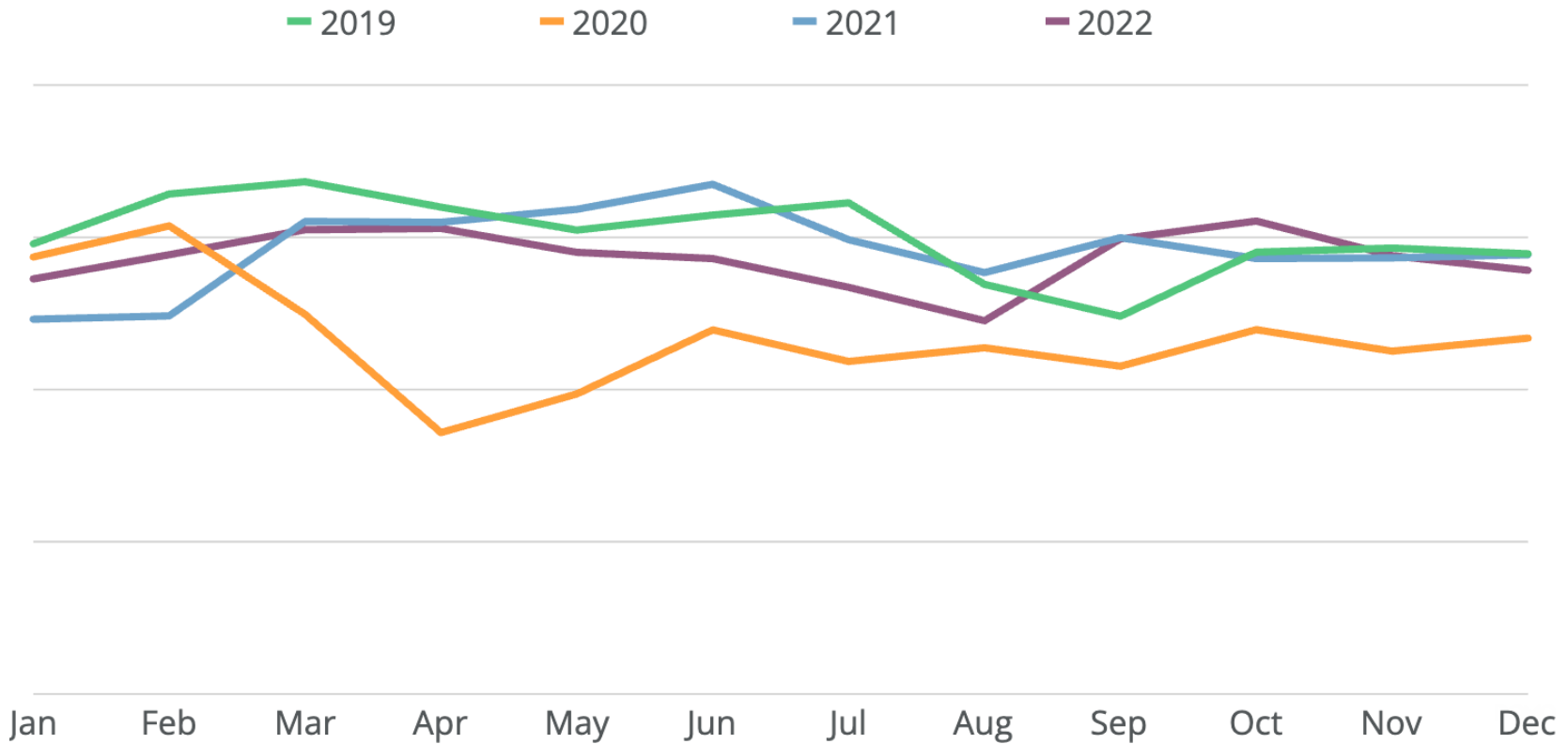
## PIMA COUNTY



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

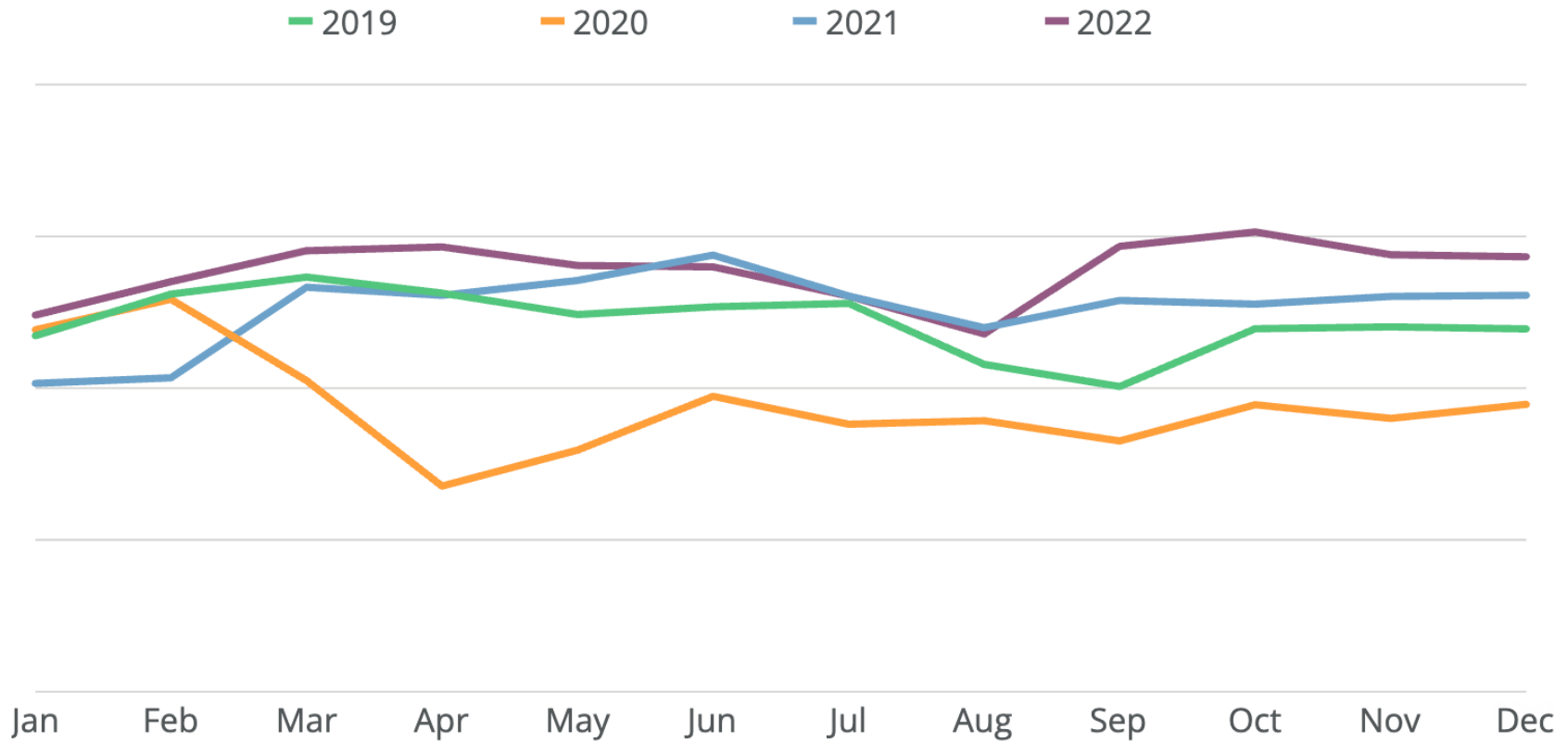
## SANTA CRUZ COUNTY



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

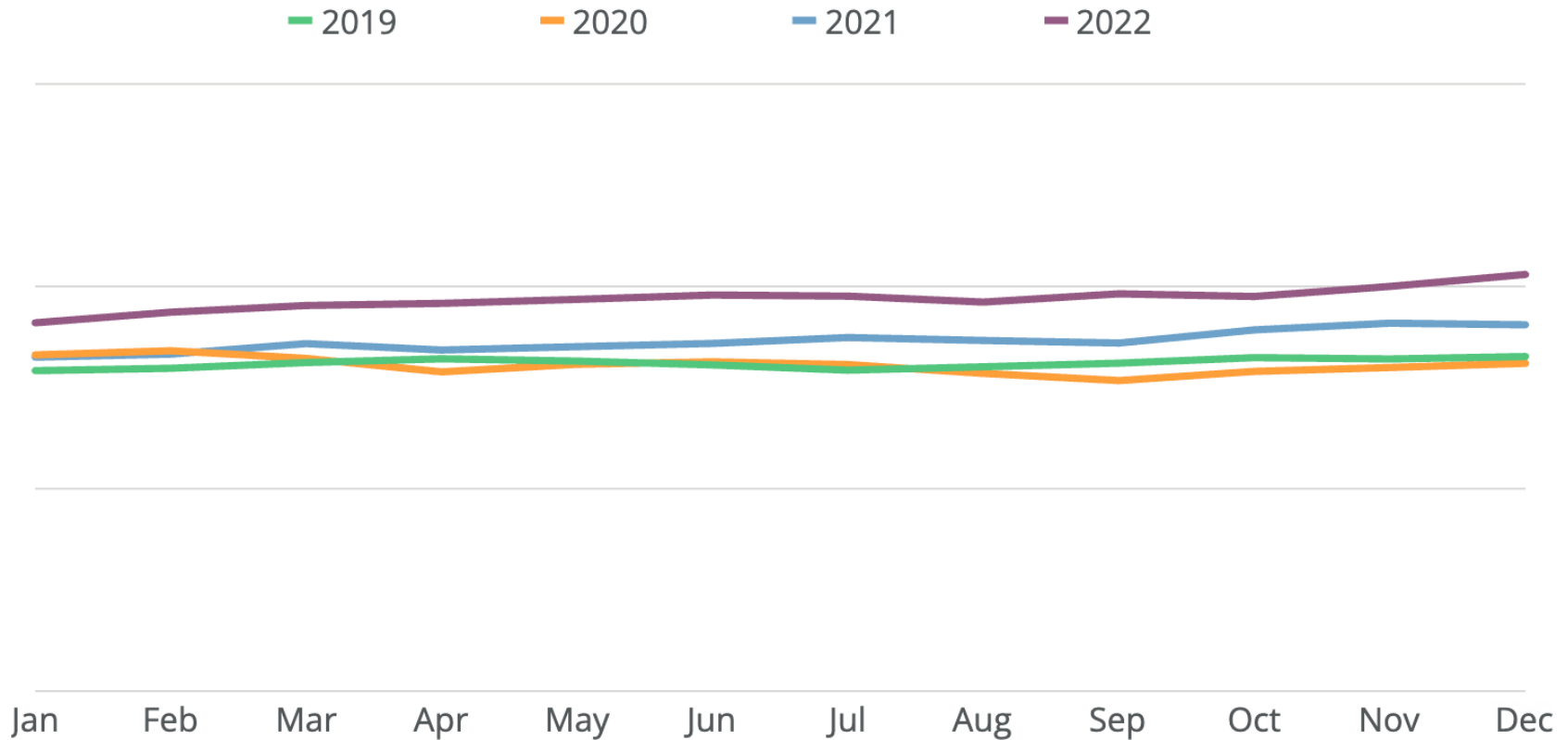
## SANTA CRUZ COUNTY



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

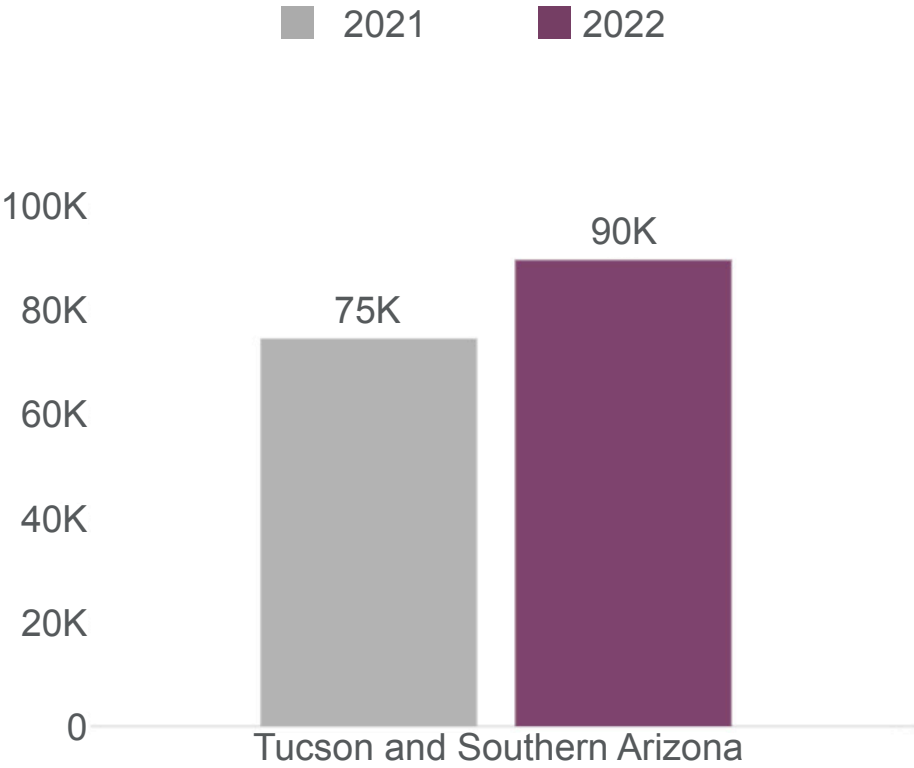
## SANTA CRUZ COUNTY



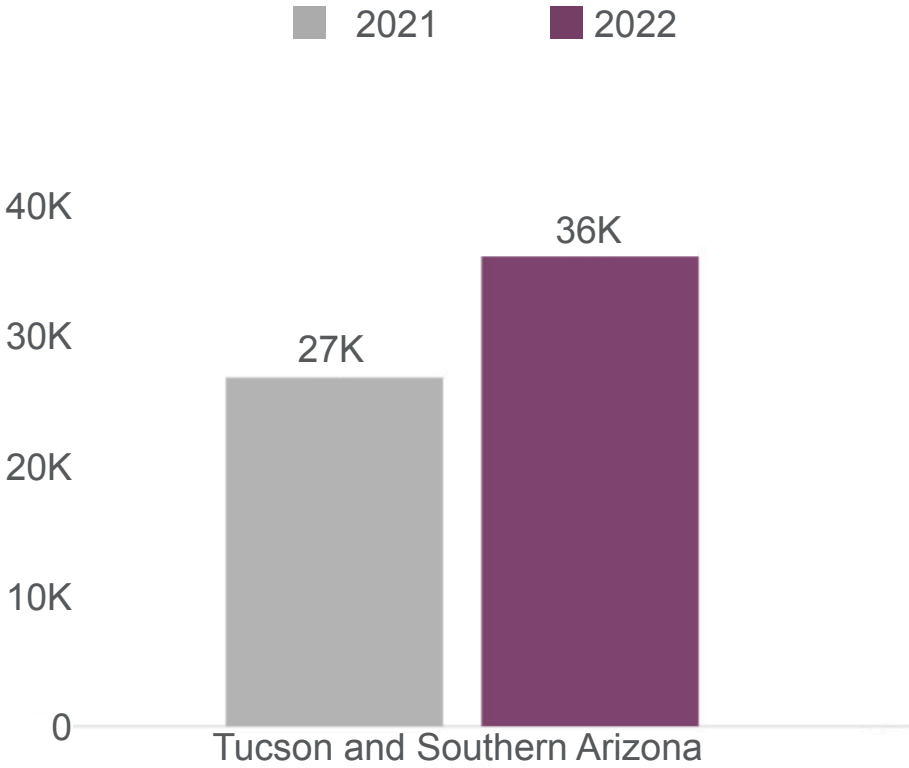
Source: Source: Smith Travel Research, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

# SHORT-TERM RENTALS

### Short Term Rental Supply

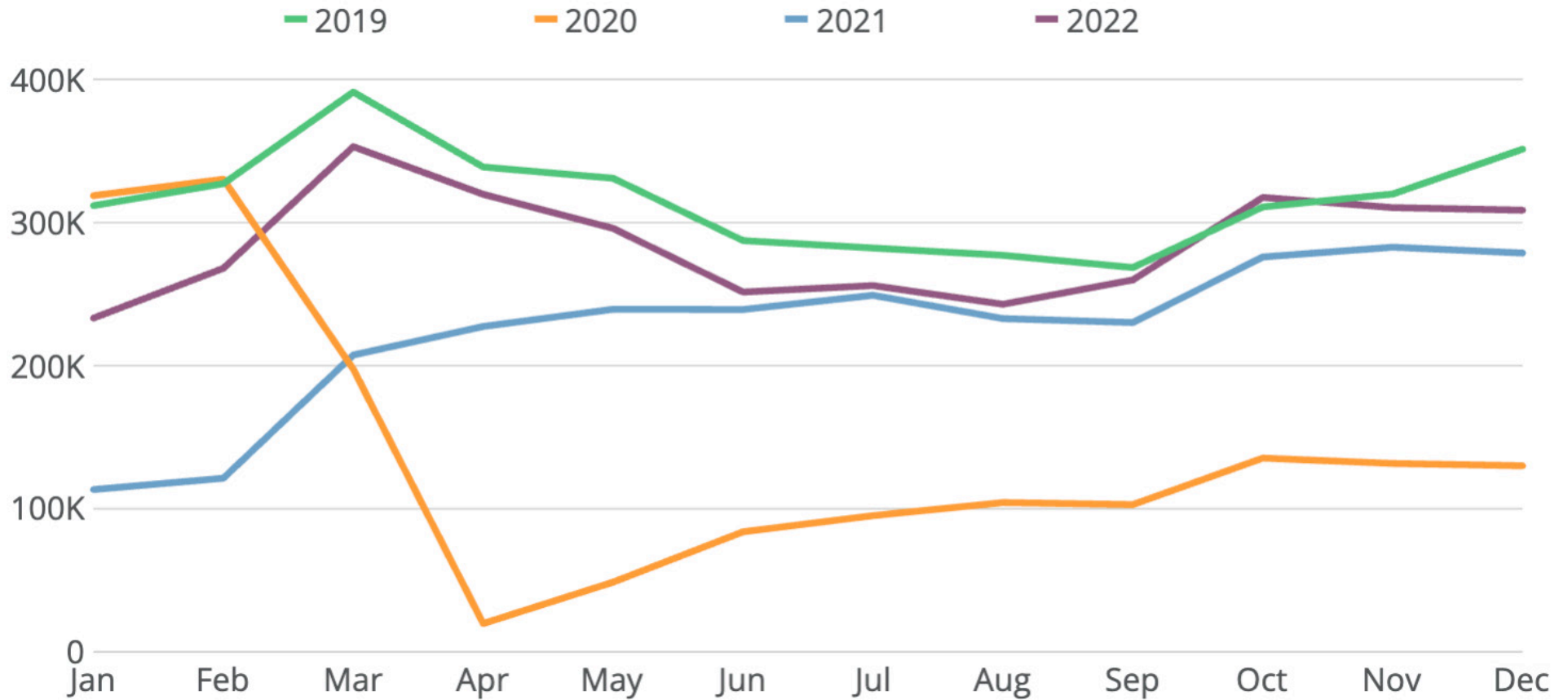


### Short Term Rental Demand



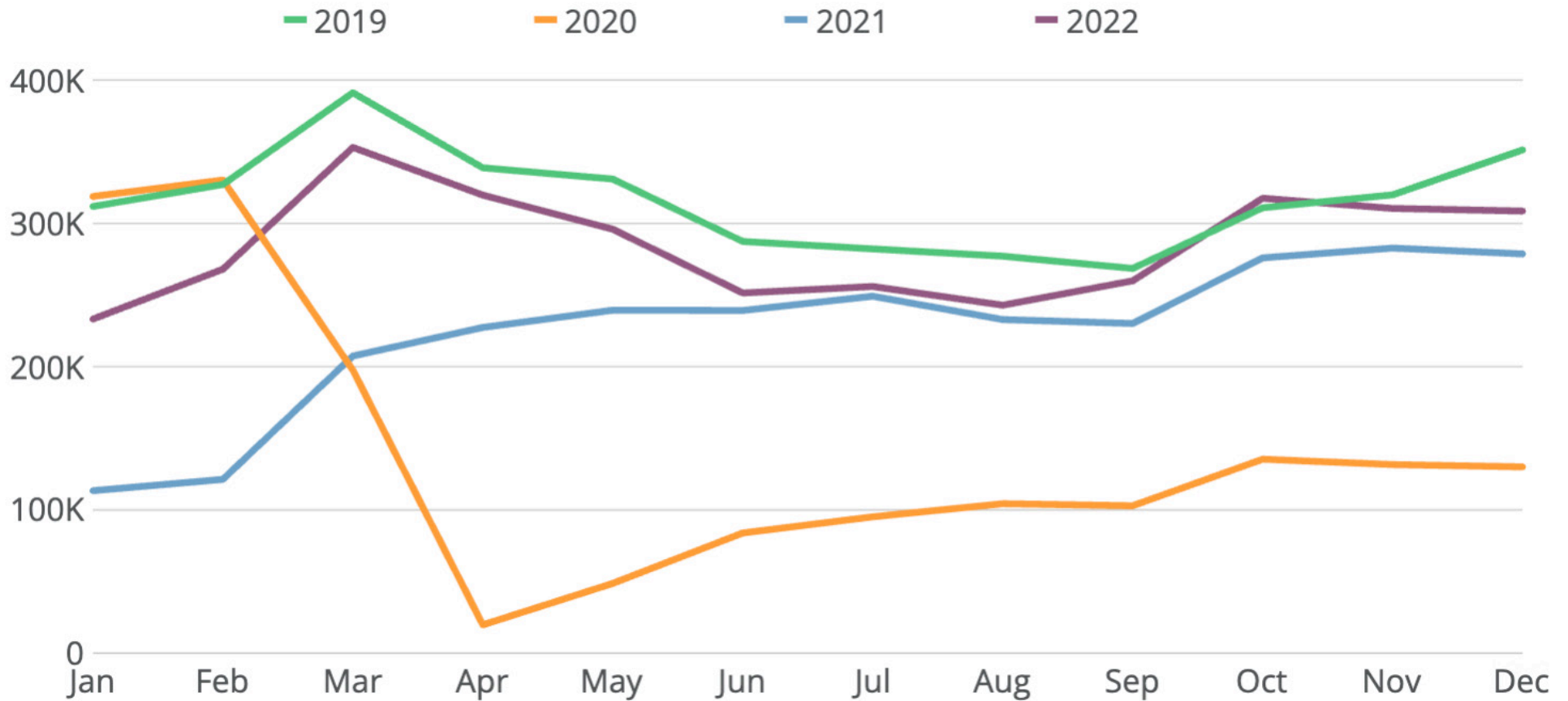
Source: Key Data

# AIRPORT PASSENGER TRAFFIC



Tucson Airport - Domestic

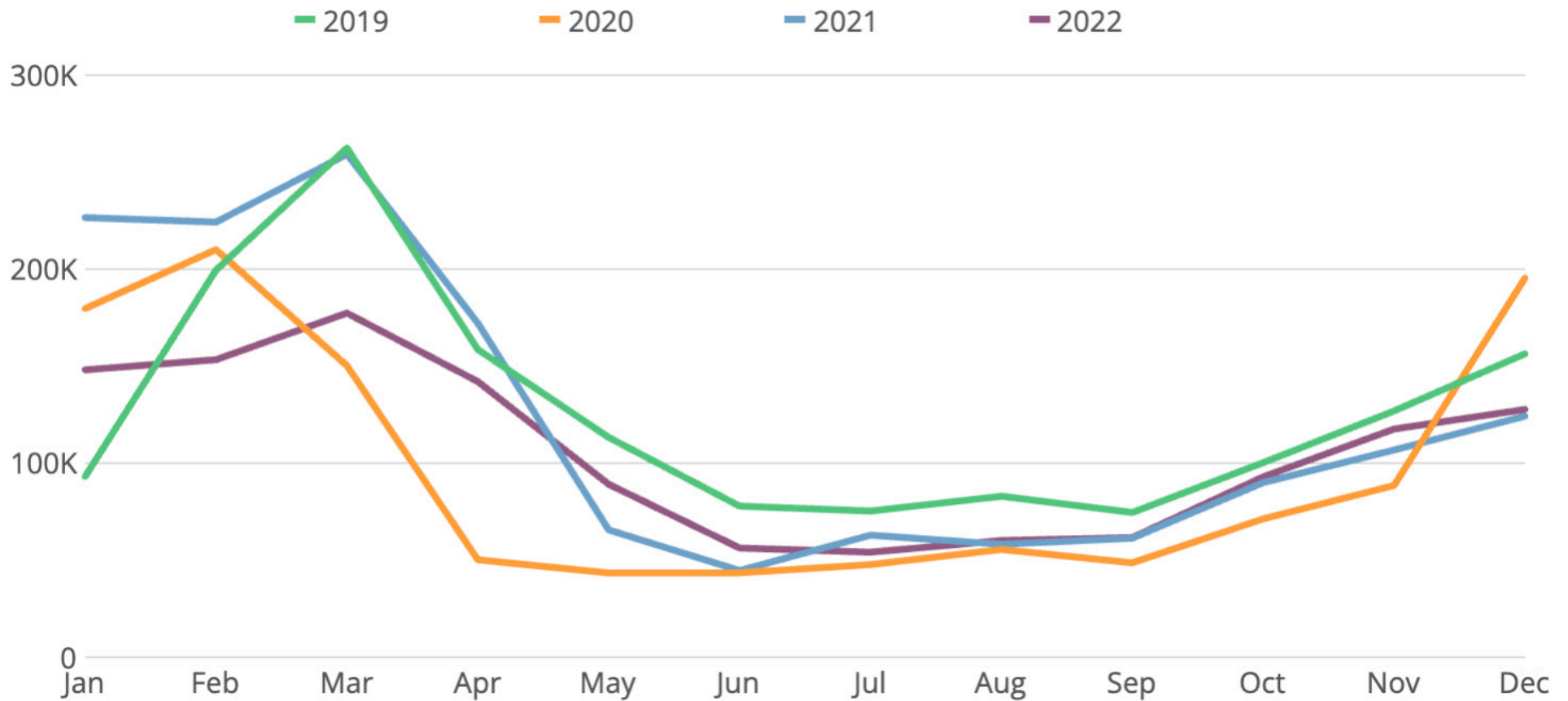
# AIRPORT PASSENGER TRAFFIC



Southern Arizona Region

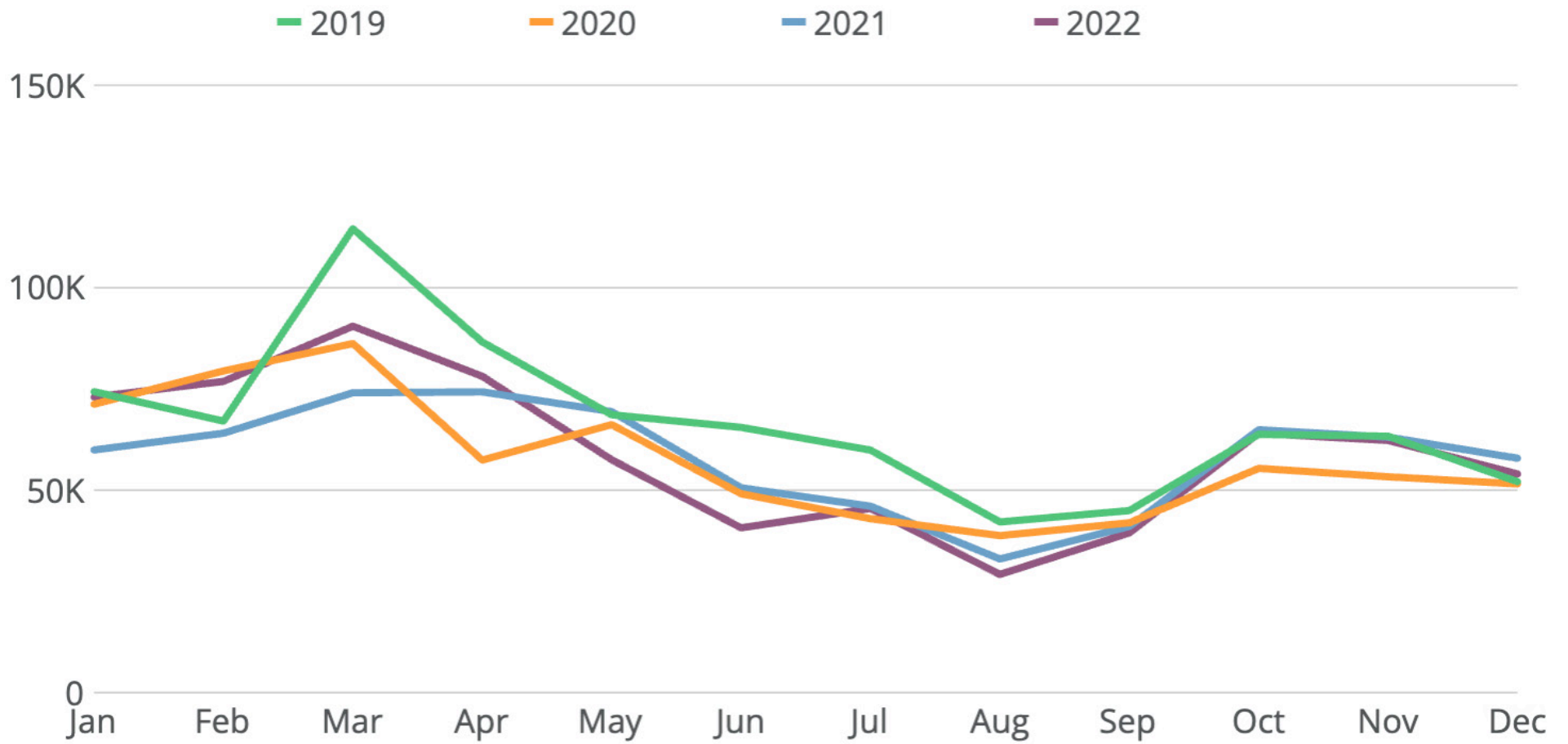


# NATIONAL PARK VISITATION



Includes: Chiricuhua NM, Coronado NM, Fort Bowie NHS, Organ Pipe Cactus NM, Saguaro NP, Tumacacori NHP

# STATE PARK VISITATION

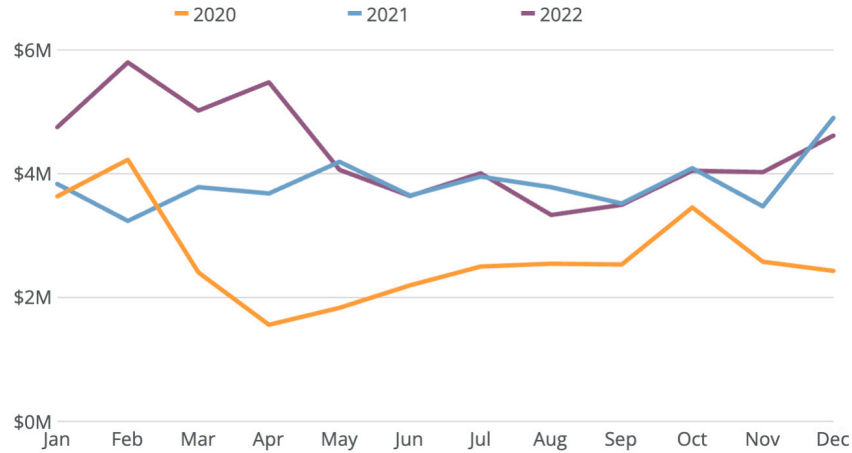


Includes: Catalina SP, Kartchner Caverns SP, Patagonia Lake SP, Roper Lake SP, Tombstone Courthouse SHP, and Tubac Presidio SHP

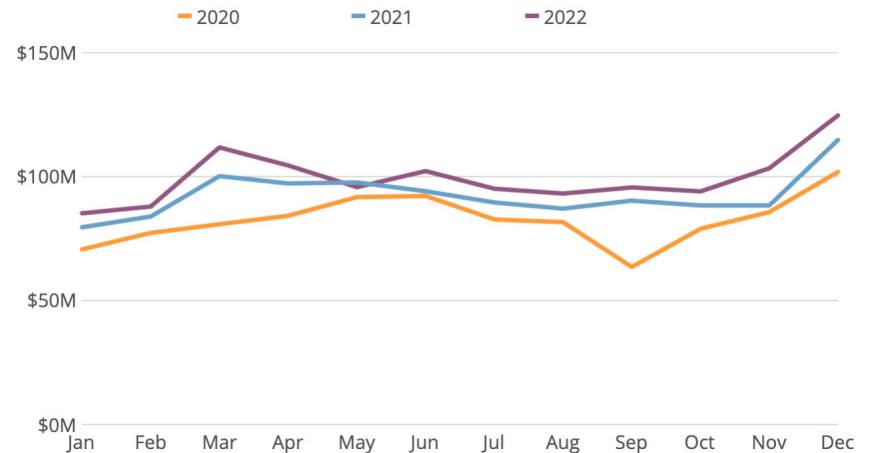
# GROSS SALES

## COCHISE COUNTY

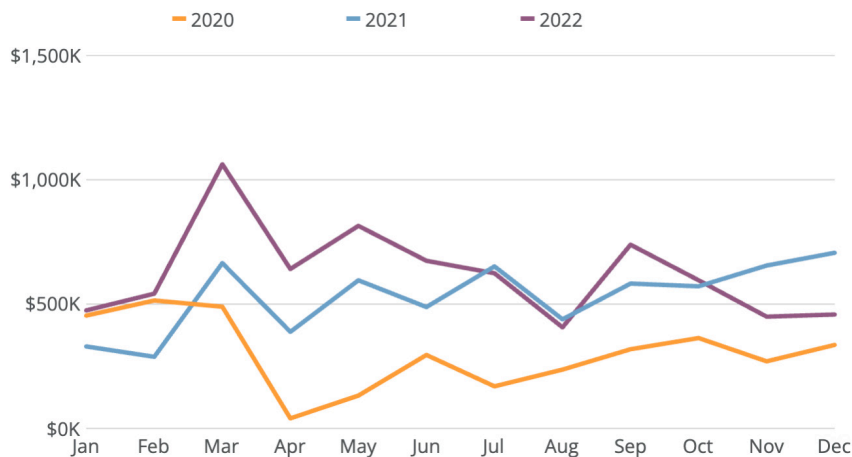
### Lodging



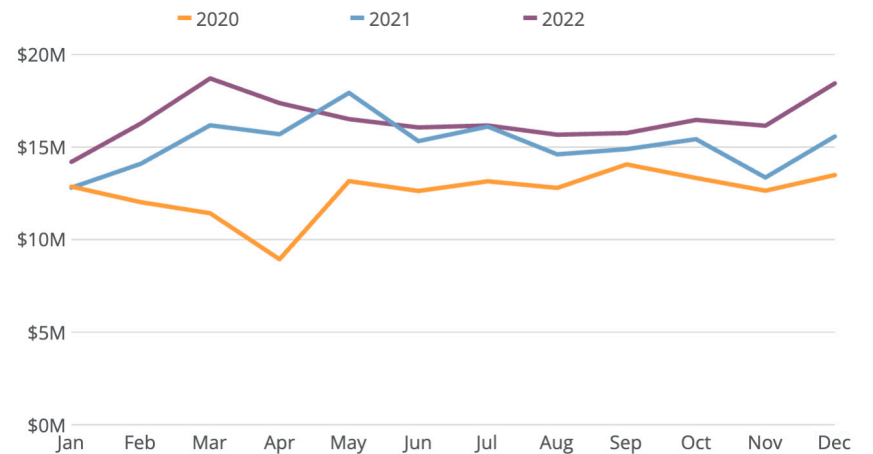
### Retail



### Amusement

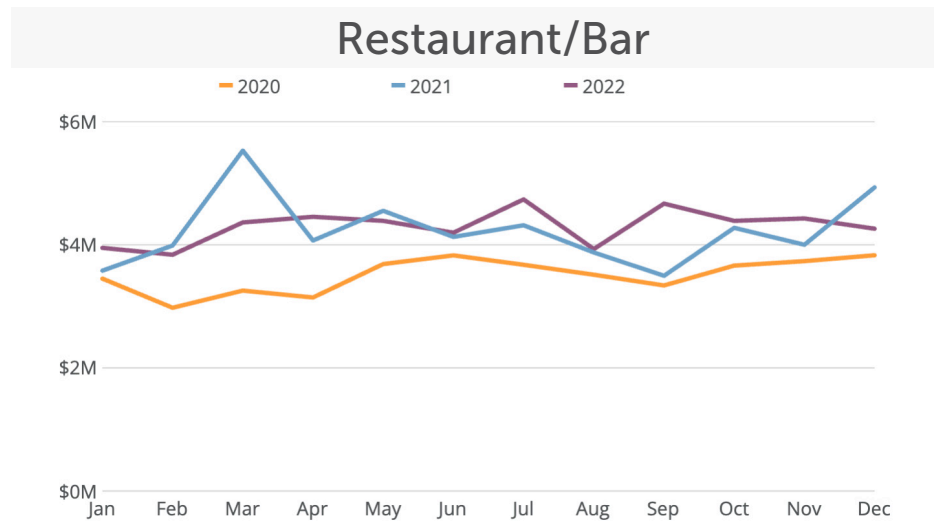
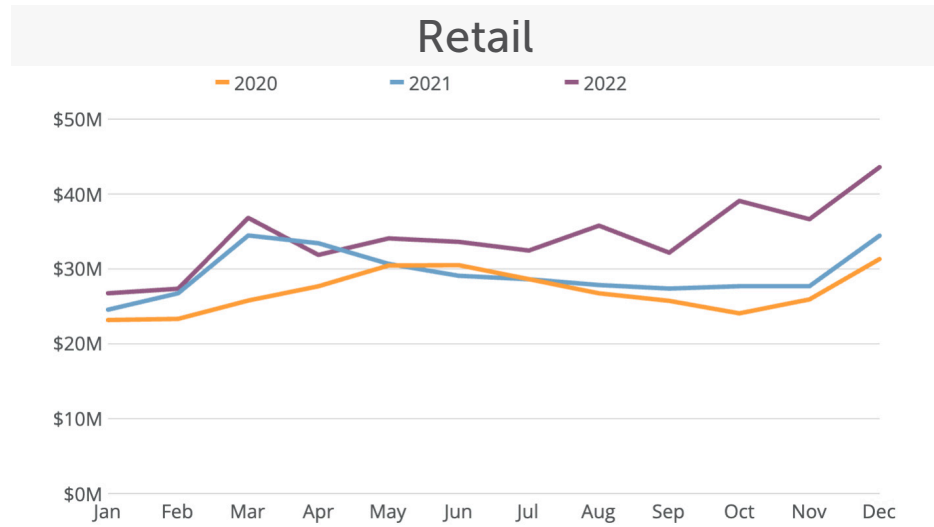


### Restaurant/Bar



# GROSS SALES

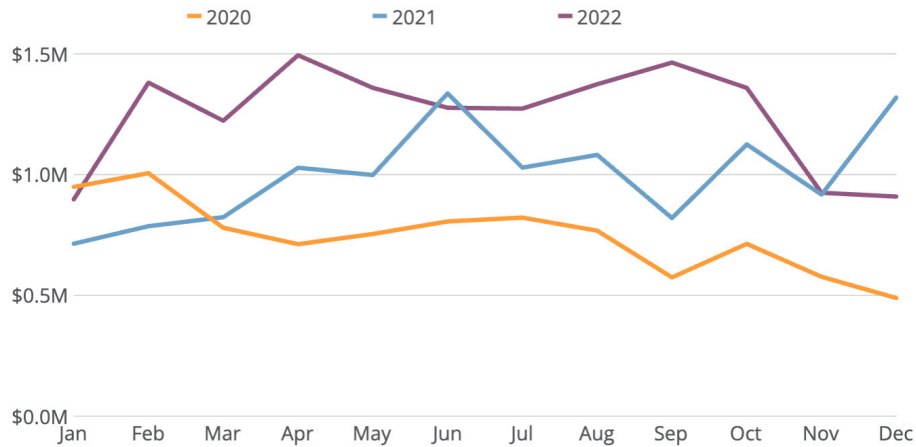
## GRAHAM COUNTY



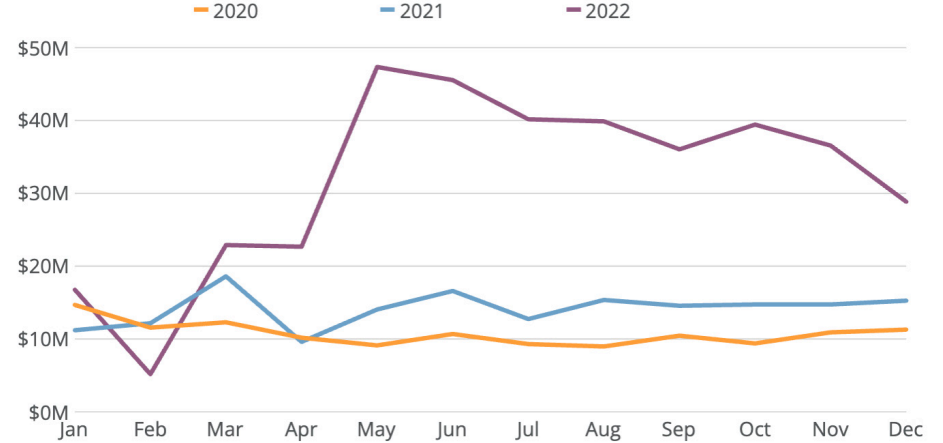
# GROSS SALES

## GREENLEE/GRAHAM/LA PAZ COUNTY

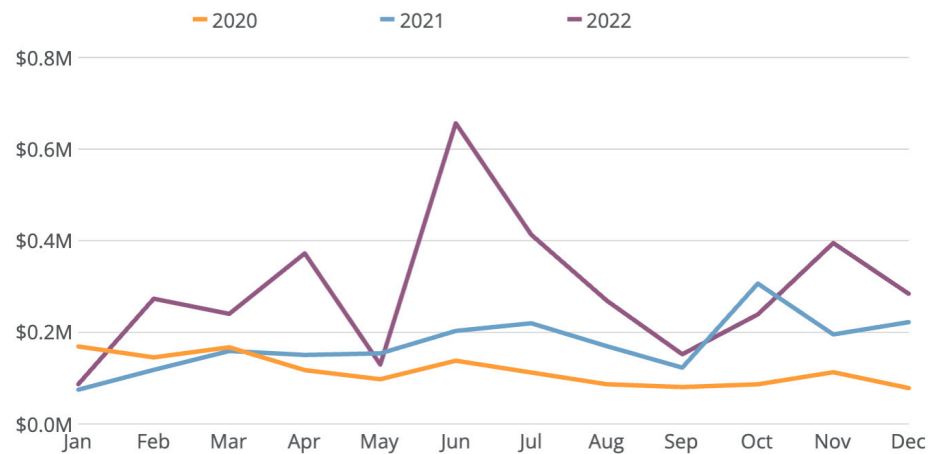
### Lodging



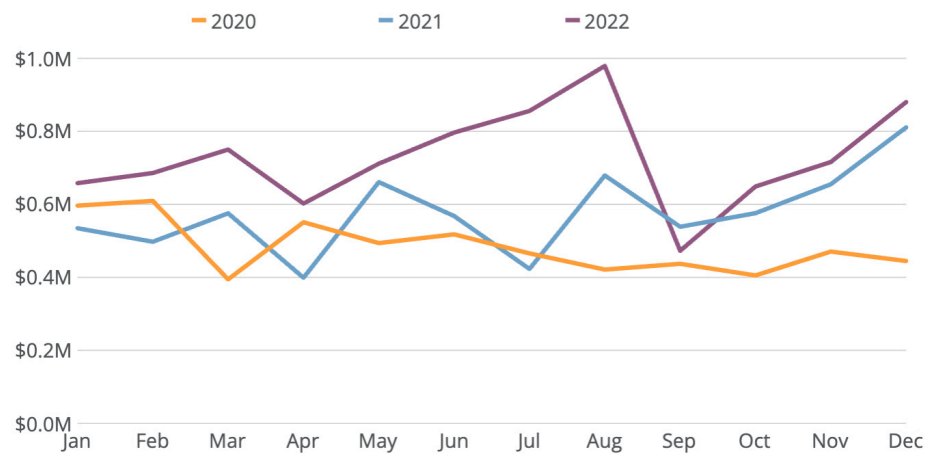
### Retail



### Amusement



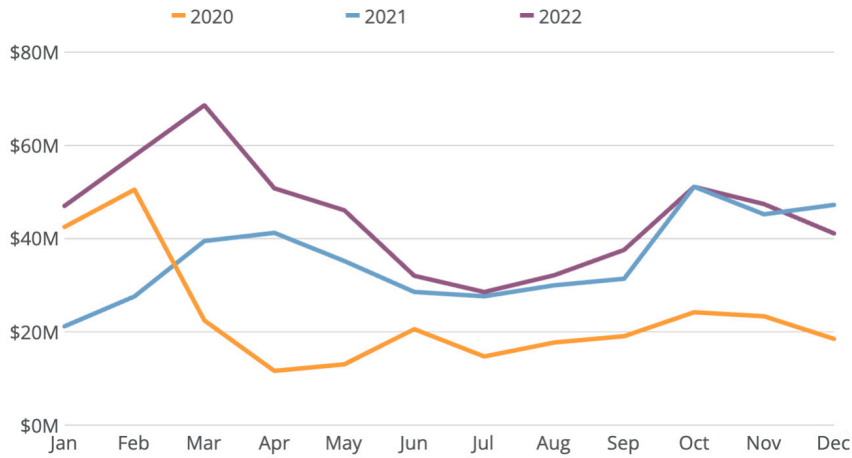
### Restaurant/Bar



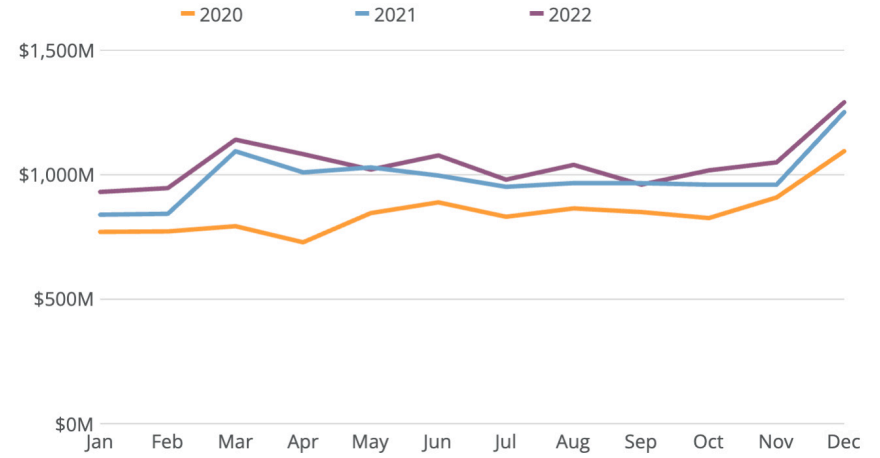
# GROSS SALES

## PIMA COUNTY

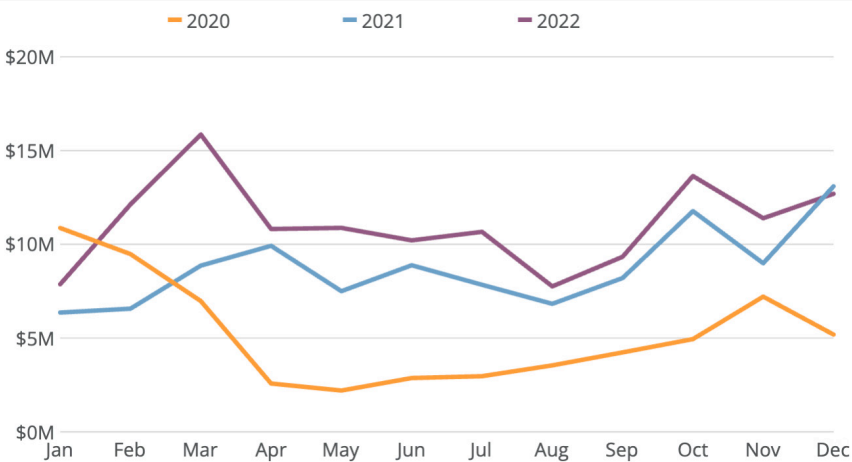
### Lodging



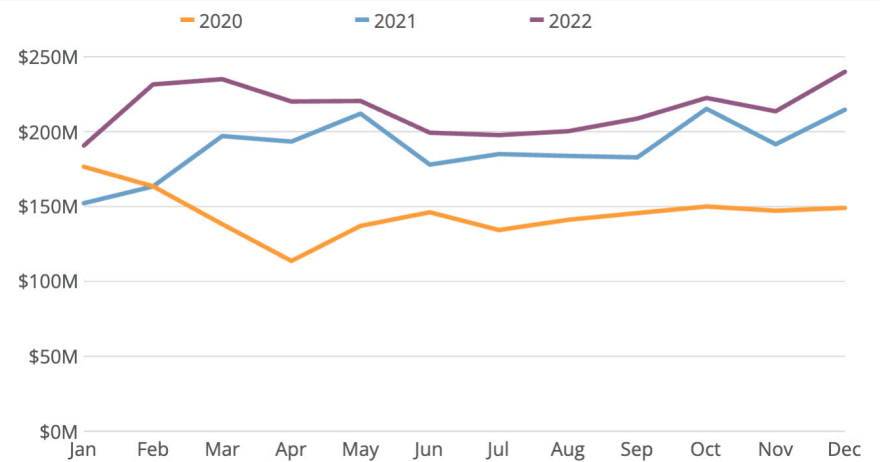
### Retail



### Amusement



### Restaurant/Bar

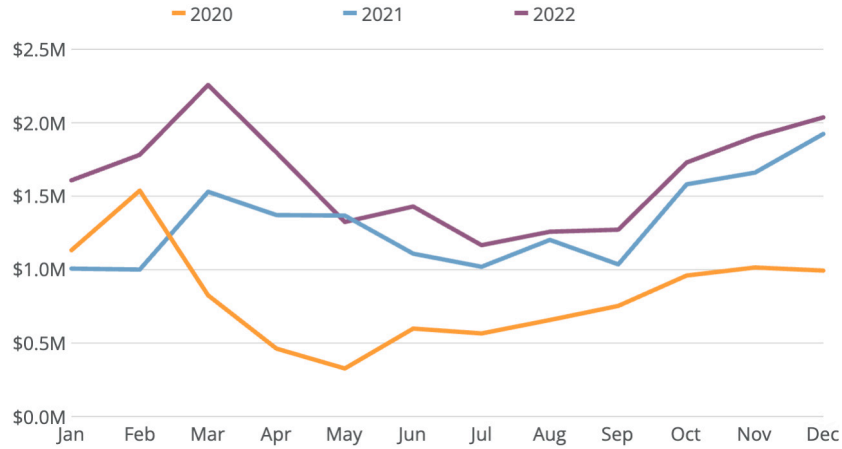


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

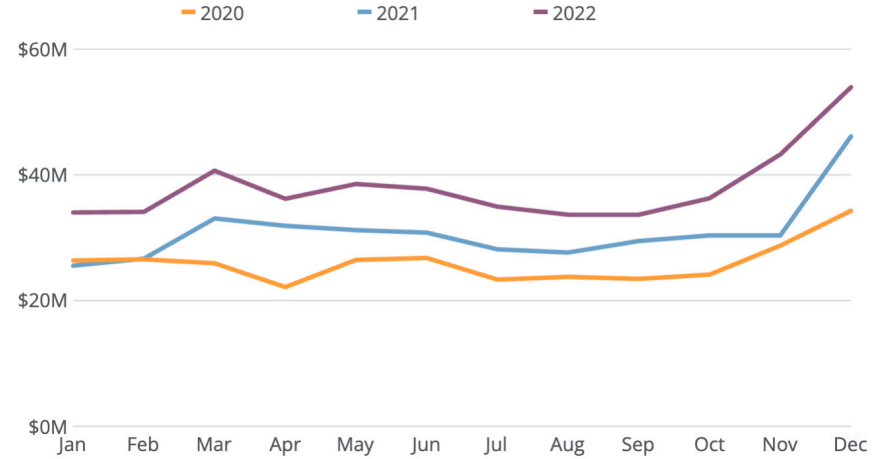
# GROSS SALES

## SANTA CRUZ COUNTY

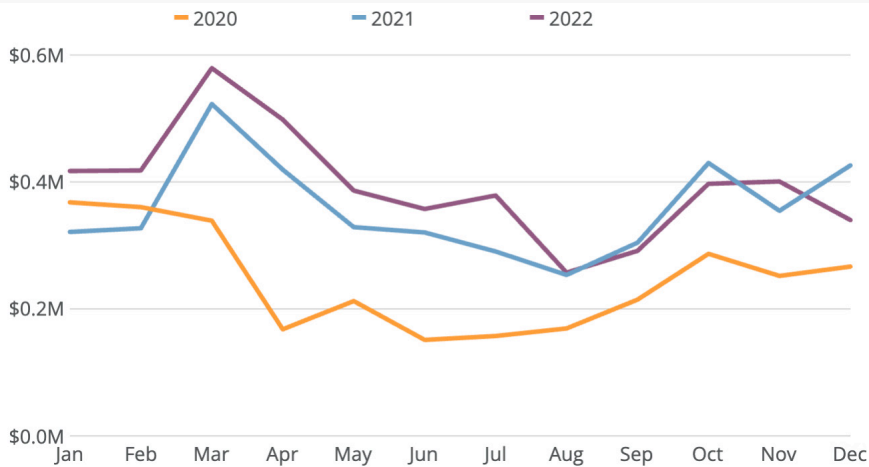
### Lodging



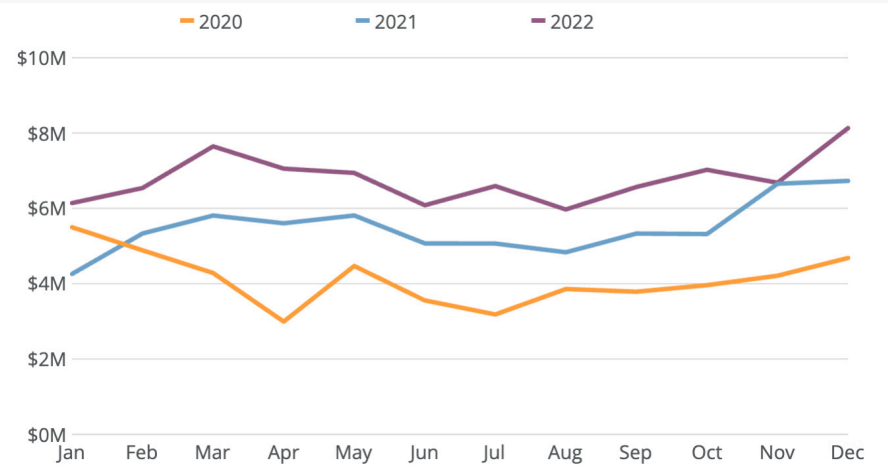
### Retail



### Amusement



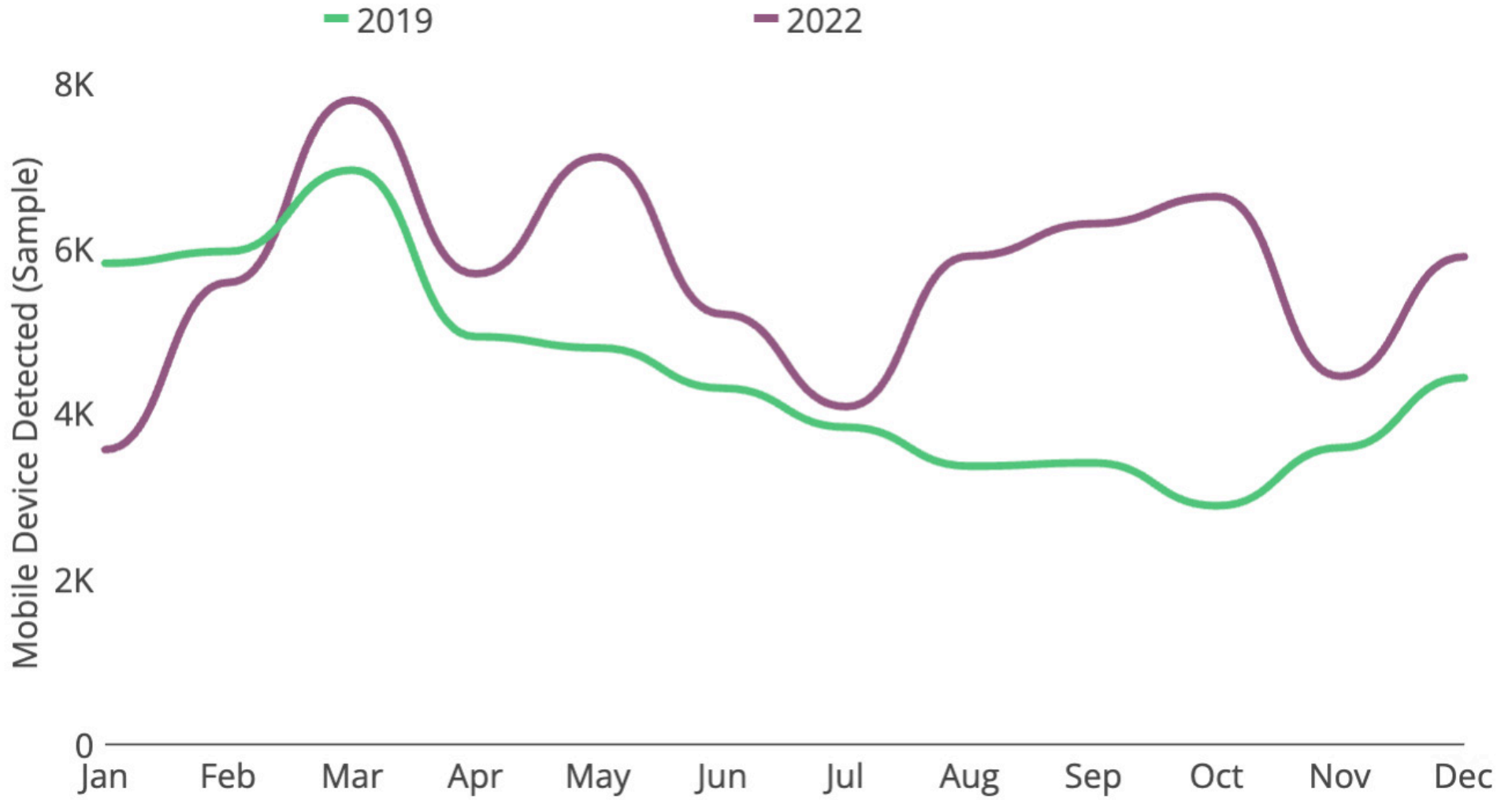
### Restaurant/Bar



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

# 2022 VISITATION SUMMARY

## TRIPS TO COCHISE COUNTY BY MONTH



Source: Near



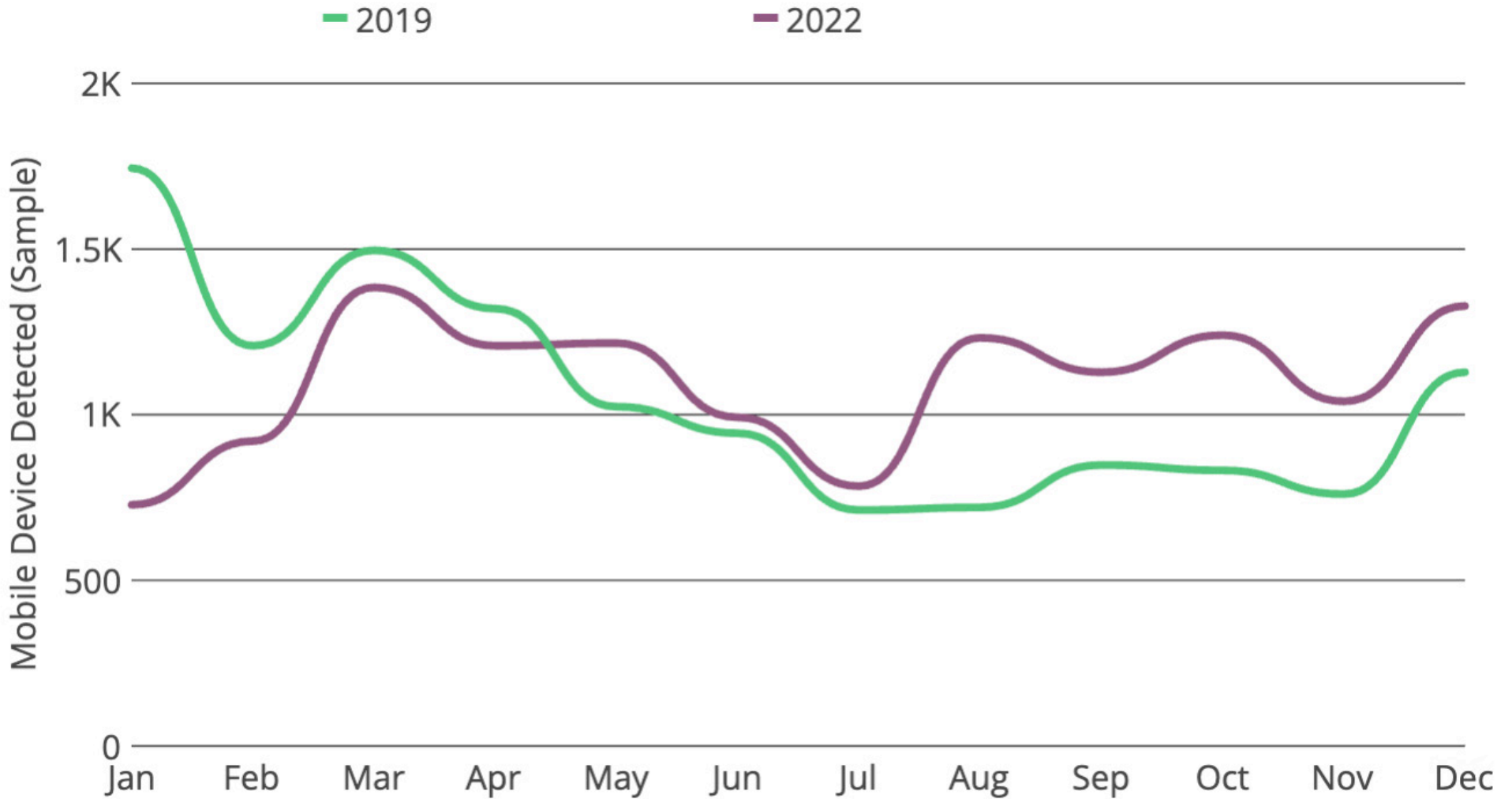
# 2022 VISITATION SUMMARY

## TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | COCHISE COUNTY

Origin DMA	% Total Visitation	Repeat Visitor Ratio	Average Time in Destination
Tucson (Sierra Vista), AZ	30%	81%	4.2
Phoenix, AZ	24%	80%	4.6
El Paso, TX	3%	73%	4.9
Albuquerque-Santa Fe, NM	3%	71%	6.1
Dallas-Ft. Worth, TX	3%	48%	7.5
Los Angeles, CA	2%	51%	7.2
Las Vegas, NV	1%	52%	7.4
Houston, TX	1%	58%	6.9
San Antonio, TX	1%	40%	7.0
Denver, CO	1%	38%	7.0

# 2022 VISITATION SUMMARY

## TRIPS TO GRAHAM COUNTY BY MONTH



Source: Near

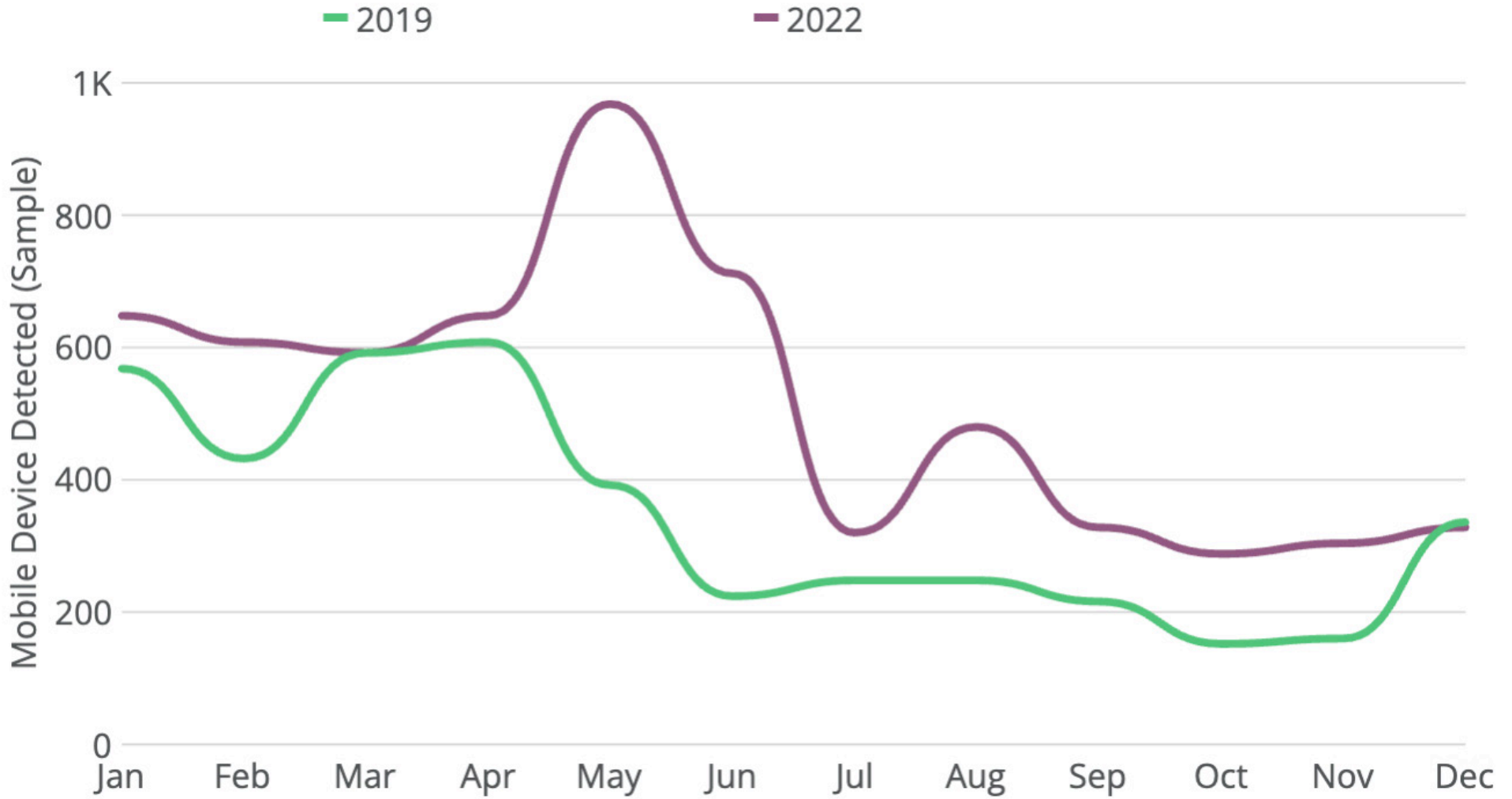
# 2022 VISITATION SUMMARY

## TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | GRAHAM COUNTY

Origin DMA	Visitor Share	Repeat Visitor Ratio	Average Time in Destination
Tucson (Sierra Vista), AZ	36%	85%	4.4
Phoenix, AZ	32%	81%	4.2
Albuquerque-Santa Fe, NM	8%	87%	5.0
Idaho Falls-Pocatello, ID	3%	41%	7.2
Shreveport, LA	3%	39%	7.3
Las Vegas, NV	2%	77%	6.7
Salt Lake City, UT	1%	43%	7.8
Denver, CO	1%	35%	6.0
Los Angeles, CA	1%	44%	5.2
Dallas-Ft. Worth, TX	1%	60%	7.7

# 2022 VISITATION SUMMARY

## TRIPS TO GREENLEE COUNTY BY MONTH



Source: Near

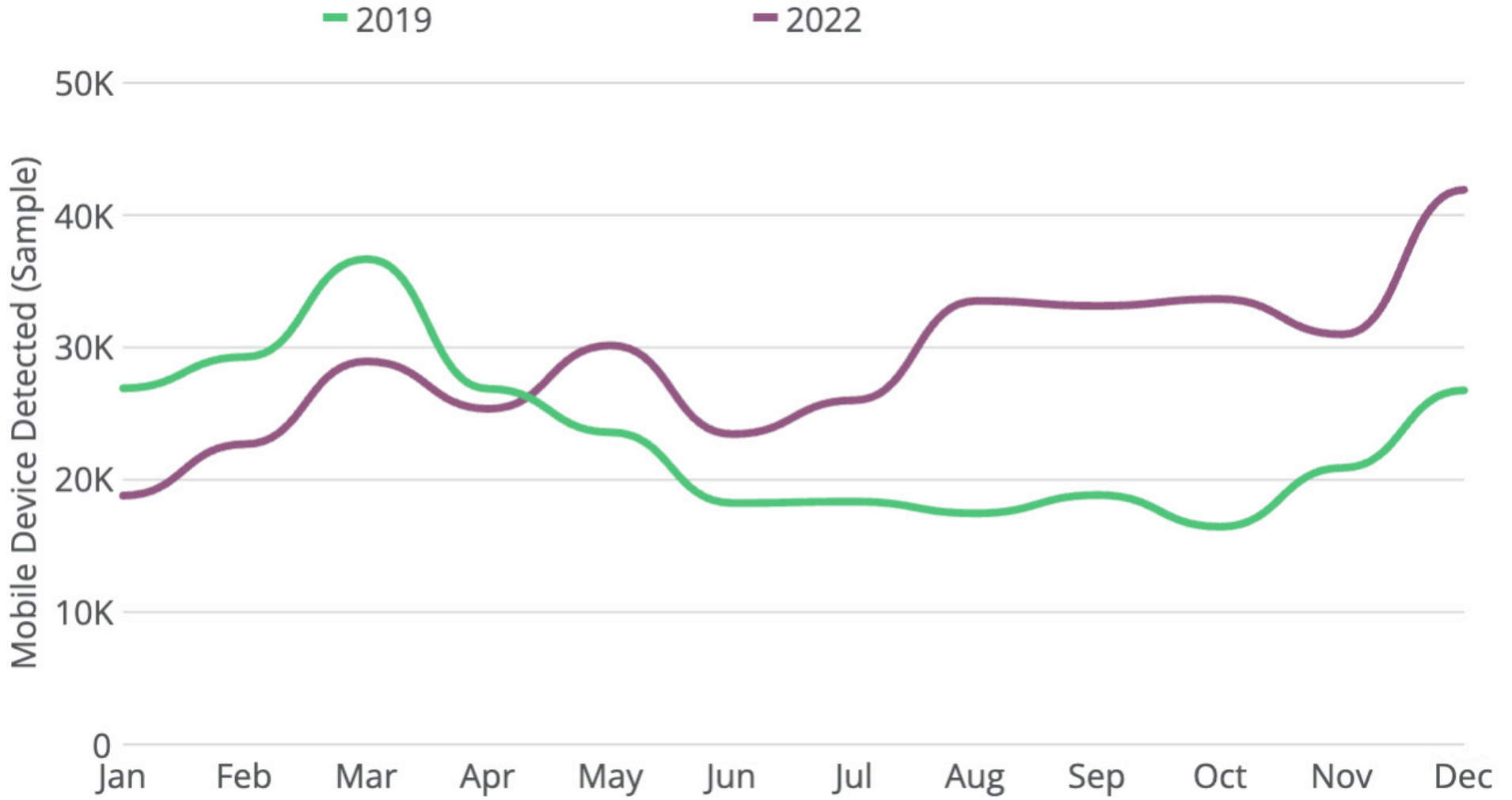
# 2022 VISITATION SUMMARY

## TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | GREENLEE COUNTY

Origin DMA	Visitor Share	Repeat Visitor Ratio	Average Time in Destination
Phoenix, AZ	37%	74%	4.0
San Diego, CA	7%	69%	3.6
Los Angeles, CA	7%	43%	6.5
Yuma, AZ-El Centro, CA	4%	77%	4.0
Tucson (Sierra Vista), AZ	3%	61%	5.9
Palm Springs, CA	3%	73%	4.2
Las Vegas, NV	1%	55%	6.1
Salt Lake City, UT	1%	50%	6.5
Albuquerque-Santa Fe, NM	1%	62%	6.6

# 2022 VISITATION SUMMARY

## TRIPS TO PIMA COUNTY BY MONTH



Source: Near

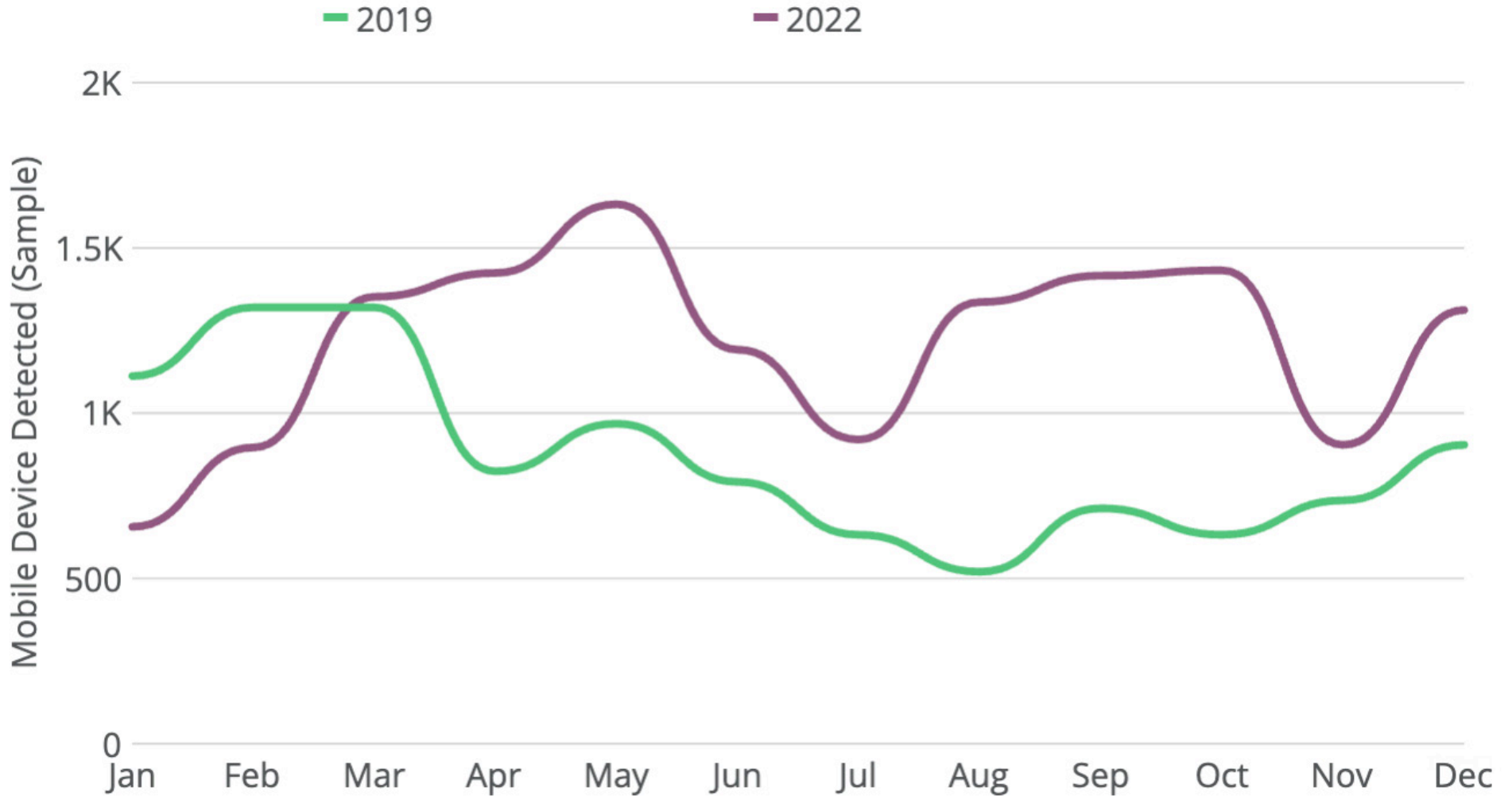
# 2022 VISITATION SUMMARY

## TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | PIMA COUNTY

Origin DMA	Visitor Share	Repeat Visitor Ratio	Average Time in Destination
Phoenix, AZ	33%	79%	4.3
Tucson (Sierra Vista), AZ	14%	87%	4.2
Albuquerque-Santa Fe, NM	8%	61%	7.2
Las Vegas, NV	7%	53%	7.6
Los Angeles, CA	3%	40%	6.6
Denver, CO	2%	34%	6.3
Salt Lake City, UT	1%	39%	6.8
Dallas-Ft. Worth, TX	1%	40%	6.2
El Paso, TX	1%	56%	6.4

# 2022 VISITATION SUMMARY

## TRIPS TO SANTA CRUZ COUNTY BY MONTH



Source: Near



# 2022 VISITATION SUMMARY

## TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | SANTA CRUZ COUNTY

Origin DMA	Visitor Share	Repeat Visitor Ratio	Average Time in Destination
Phoenix, AZ	33%	79%	4.3
Tucson (Sierra Vista), AZ	14%	87%	4.2
Albuquerque-Santa Fe, NM	8%	61%	7.2
Las Vegas, NV	7%	53%	7.6
Los Angeles, CA	3%	40%	6.6
Denver, CO	2%	34%	6.3
Salt Lake City, UT	1%	39%	6.8
Dallas-Ft. Worth, TX	1%	40%	6.2
El Paso, TX	1%	56%	6.4

# THANKS!

