

NORTHERN 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

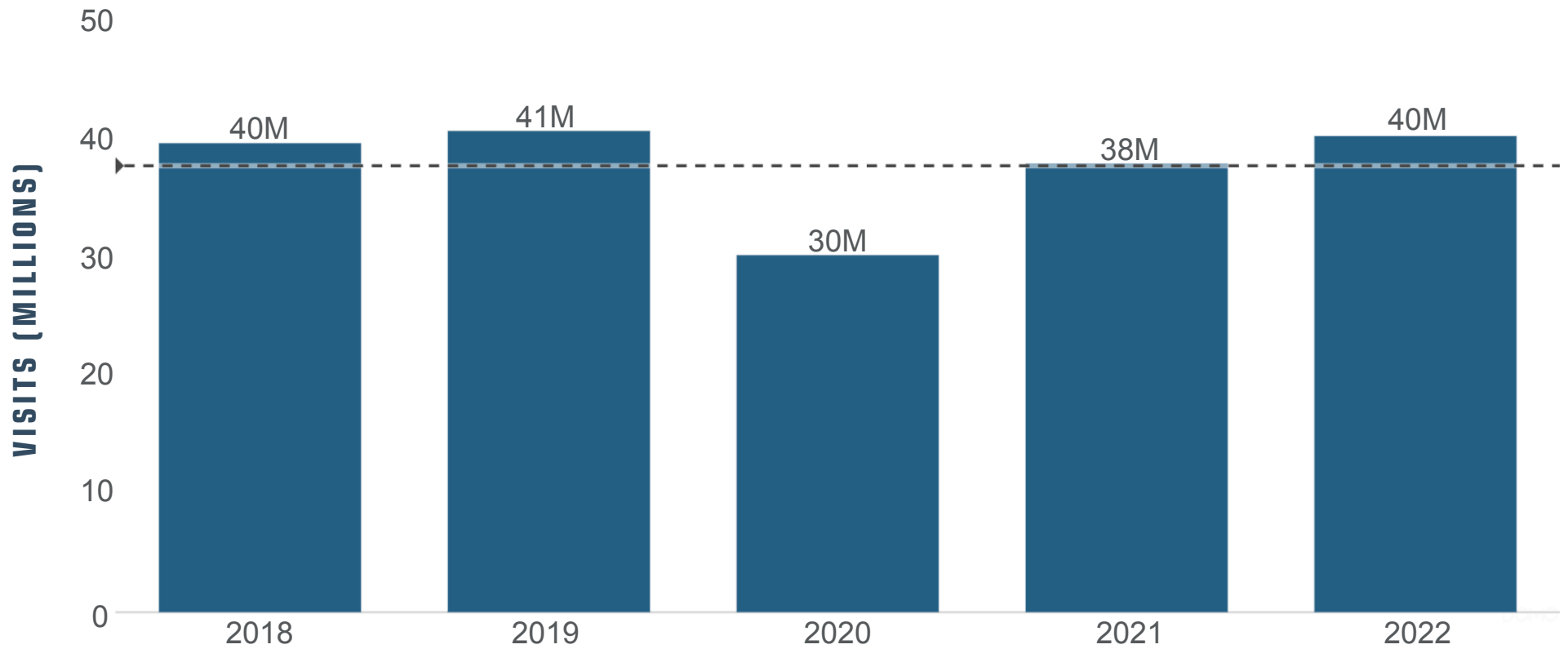
TRAVEL SPENDING

2022 vs 2019

+10%



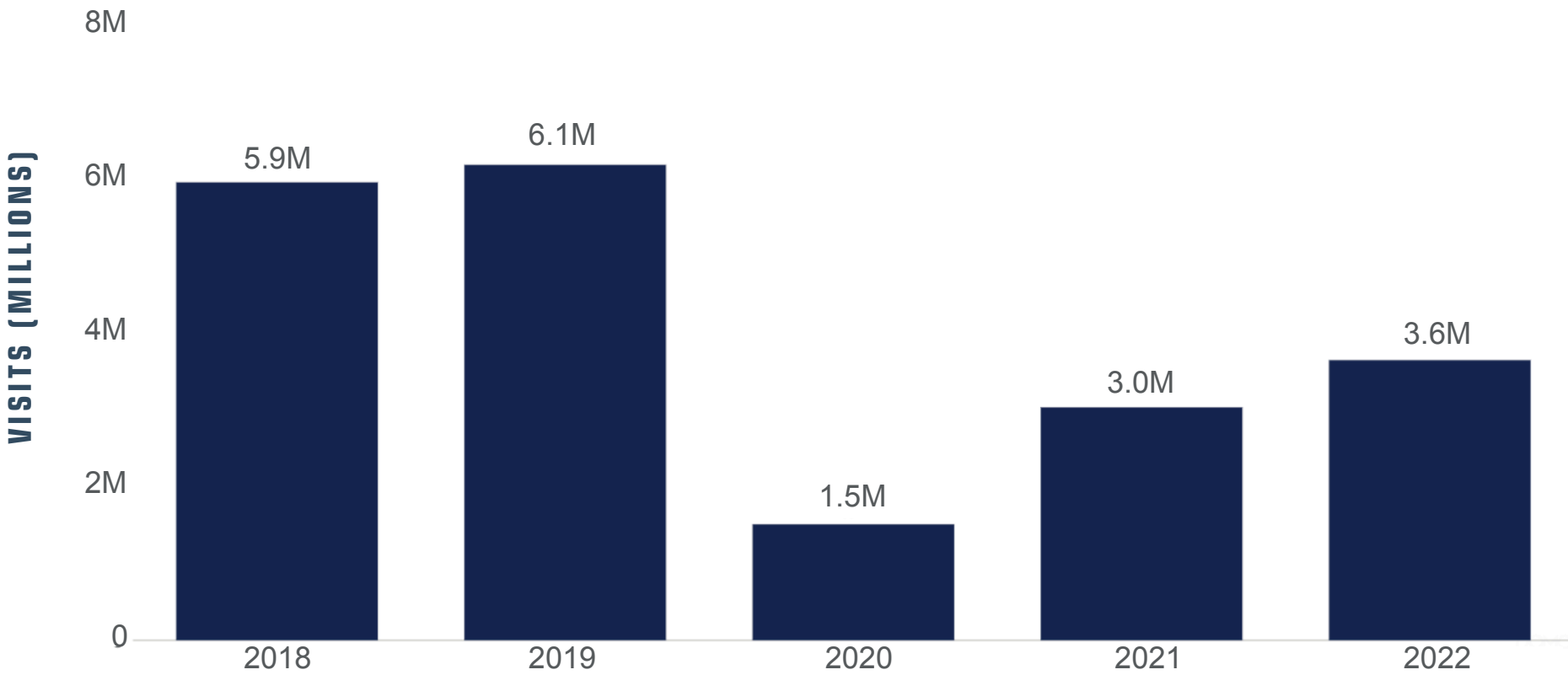
DOMESTIC OVERNIGHT VISITATION



AVERAGE: 38

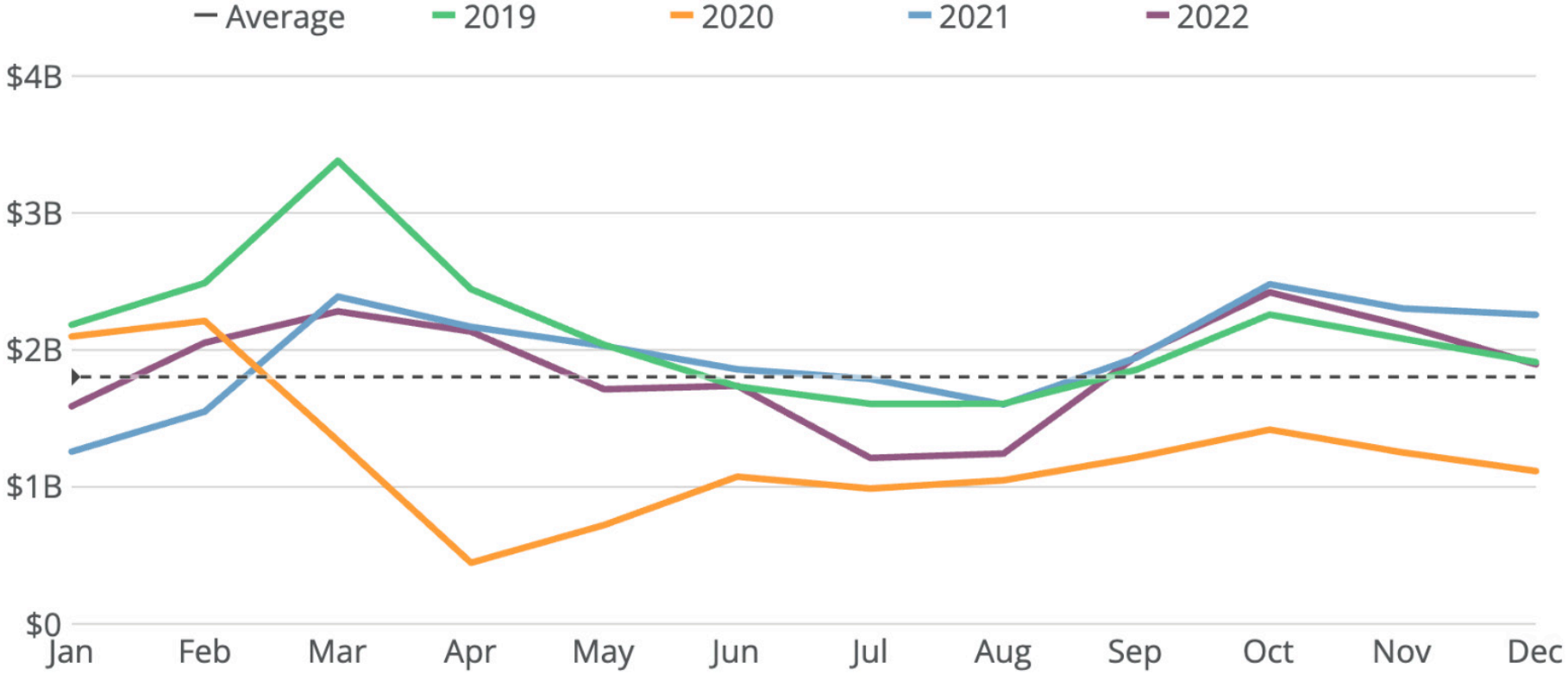
Source: Tourism Economics

INTERNATIONAL VISITATION



Source: Tourism Economics

TRAVEL SPENDING TREND

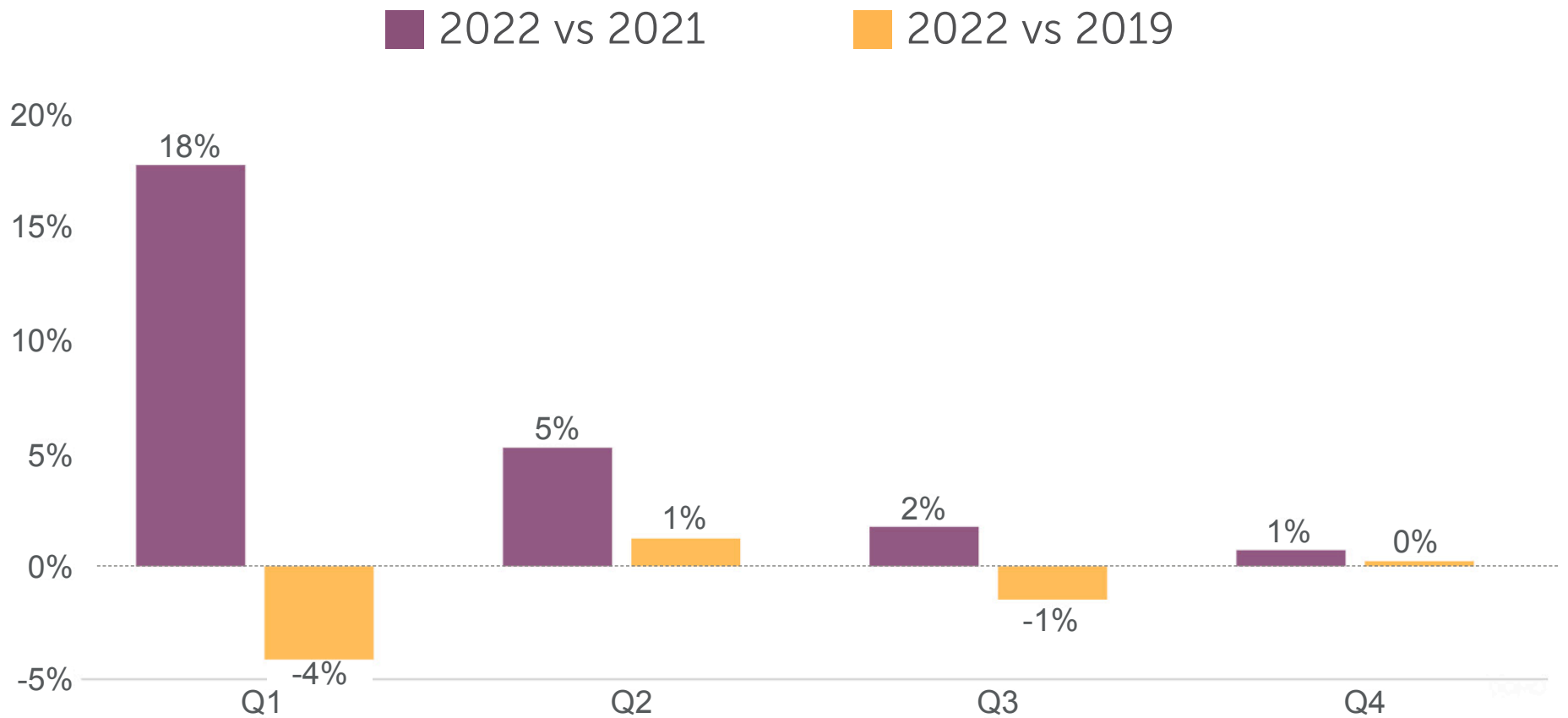


AVERAGE: \$1.80B

Source: Dean Runyan Associates

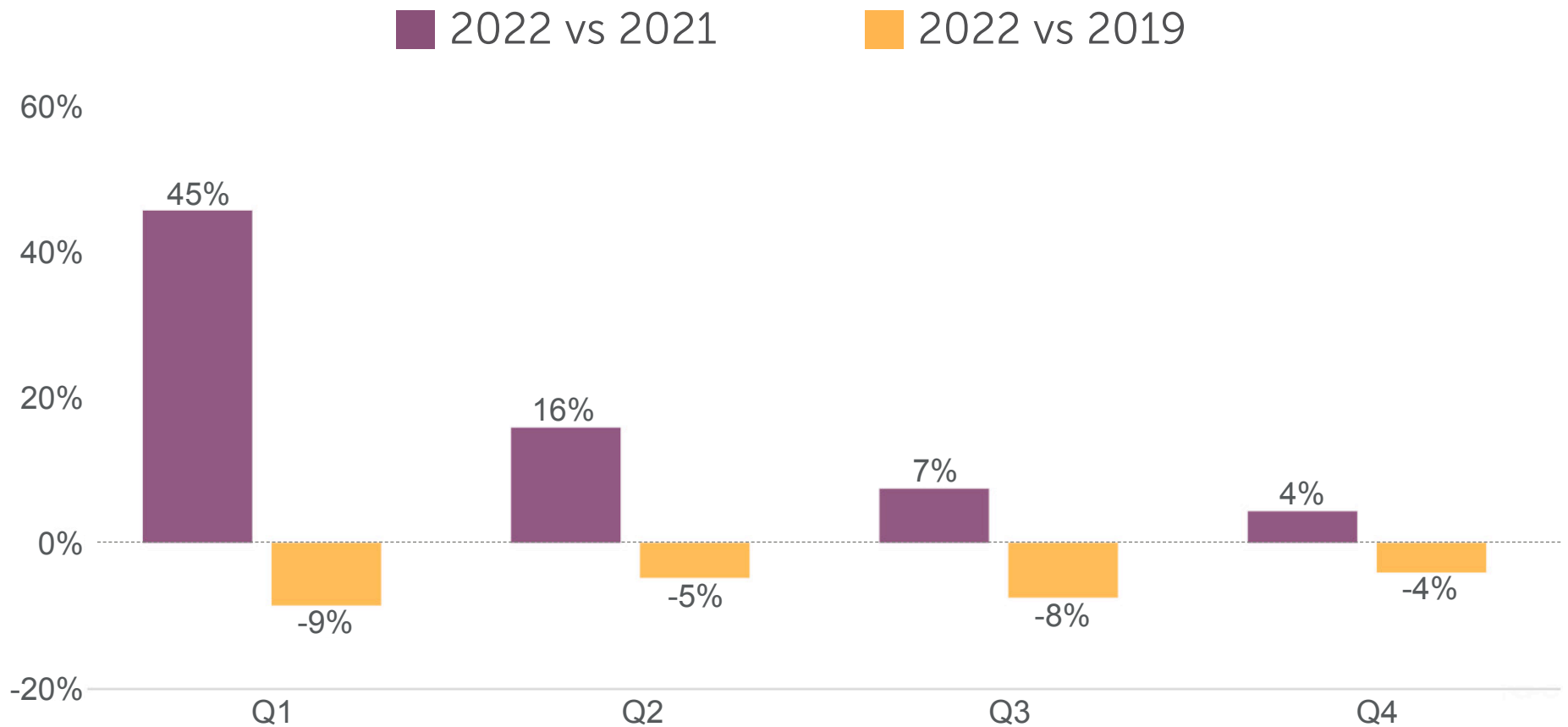
DOMESTIC OVERNIGHT VISITATION - % CHANGE

TOTAL



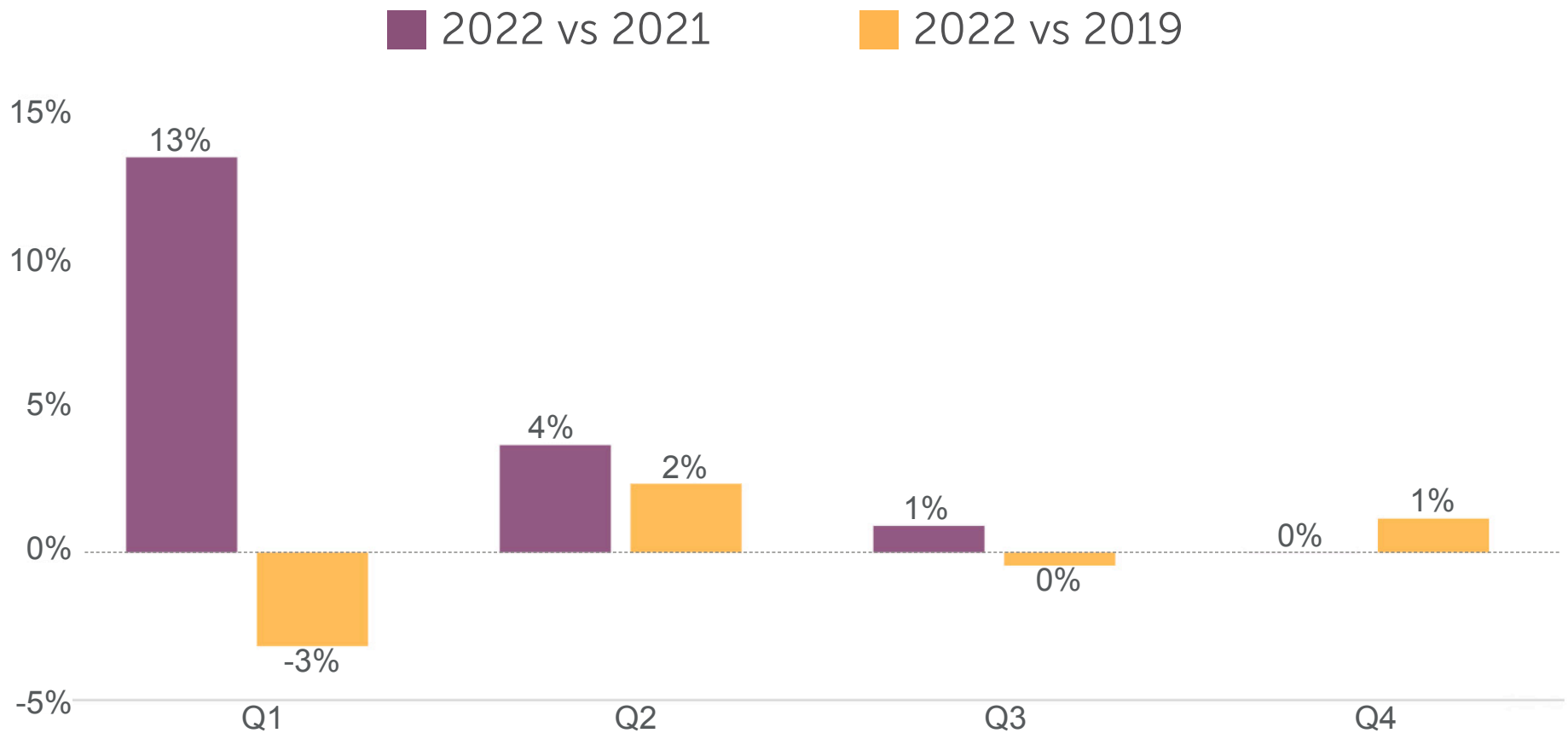
DOMESTIC OVERNIGHT VISITATION - % CHANGE

BUSINESS



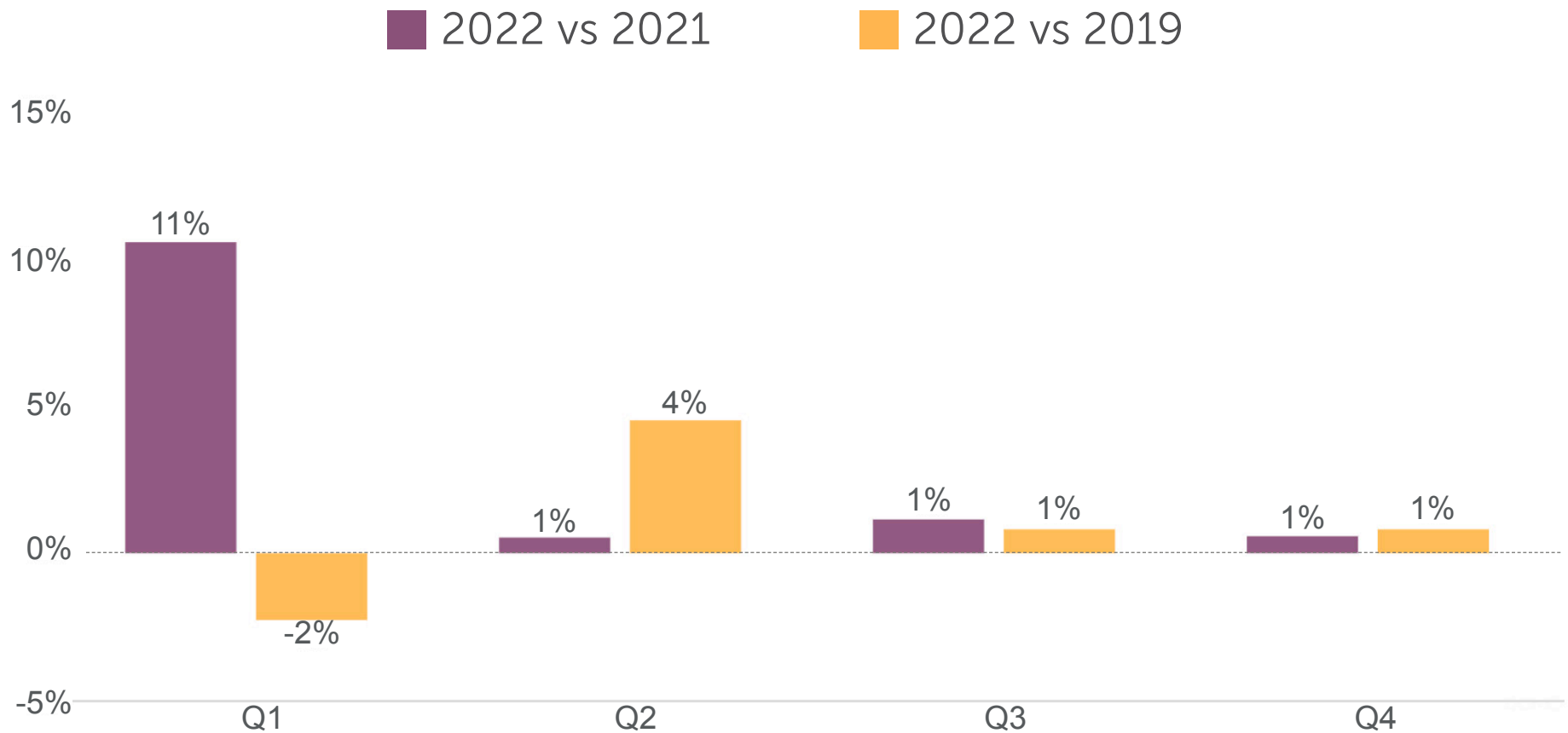
DOMESTIC OVERNIGHT VISITATION - % CHANGE

LEISURE



DOMESTIC OVERNIGHT VISITATION - % CHANGE

RESIDENT



VISITOR SPENDING BY COUNTY

APACHE

\$149M

2022 VS 2021

+1.7%

COCONINO

\$1.77B

2022 VS 2021

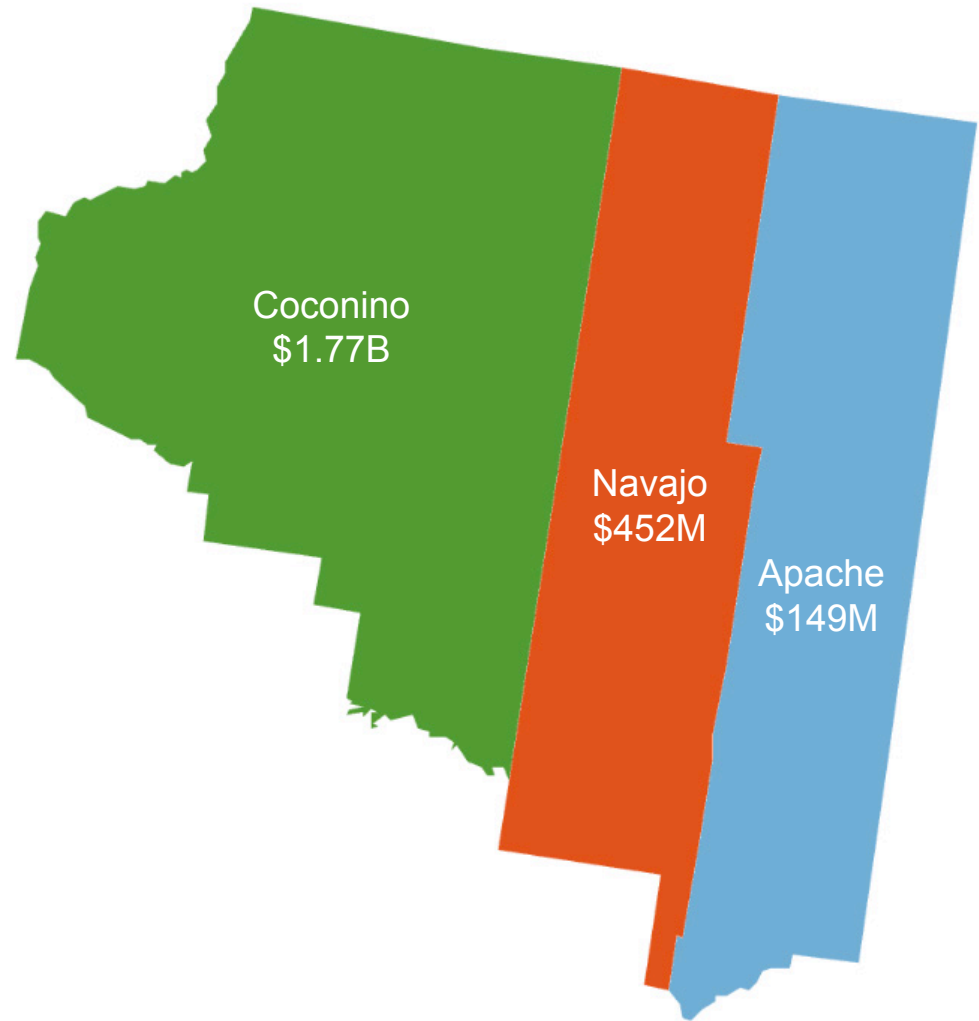
+7.3%

NAVAJO

\$452M

2022 VS 2021

+6.2%



TRAVEL IMPACTS

APACHE

DIRECT TRAVEL SPENDING

+\$25M

2022 VS 2021

+1.7%

LOCAL TAX RECEIPTS

+\$1.5M

2022 VS 2021

+8.4%

EMPLOYMENT (JOBS)

+50

2022 VS 2021

+3.88%

ACCOMMODATIONS SPENDING

-\$9.3M

2022 VS 2021

+14%

FOOD SERVICE SPENDING

-\$133,134

2022 VS 2021

-0.3%

EARNINGS

+\$2.5M

2022 VS 2021

+7%

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

TRAVEL IMPACTS

COCONINO

DIRECT TRAVEL SPENDING

+\$121M

2022 VS 2021

+7.3%

LOCAL TAX RECEIPTS

+\$7.5M

2022 VS 2021

+9.0%

EMPLOYMENT (JOBS)

+900

2022 VS 2021

+7.3%

ACCOMMODATIONS SPENDING

+\$72M

2022 VS 2021

+6.1%

FOOD SERVICE SPENDING

+\$12.5M

2022 VS 2021

+3.2%

EARNINGS

+\$47.1M

2022 VS 2021

+10.2%

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

TRAVEL IMPACTS

NAVAJO

DIRECT TRAVEL SPENDING

+\$26.3M

2022 VS 2021

+6.2%

LOCAL TAX RECEIPTS

+\$1.5M

2022 VS 2021

+8.4%

EMPLOYMENT (JOBS)

+300

2022 VS 2021

+7.5%

ACCOMMODATIONS SPENDING

+\$2.7M

2022 VS 2021

+1.2%

FOOD SERVICE SPENDING

+\$3M

2022 VS 2021

+2.6%

EARNINGS

+\$13.8M

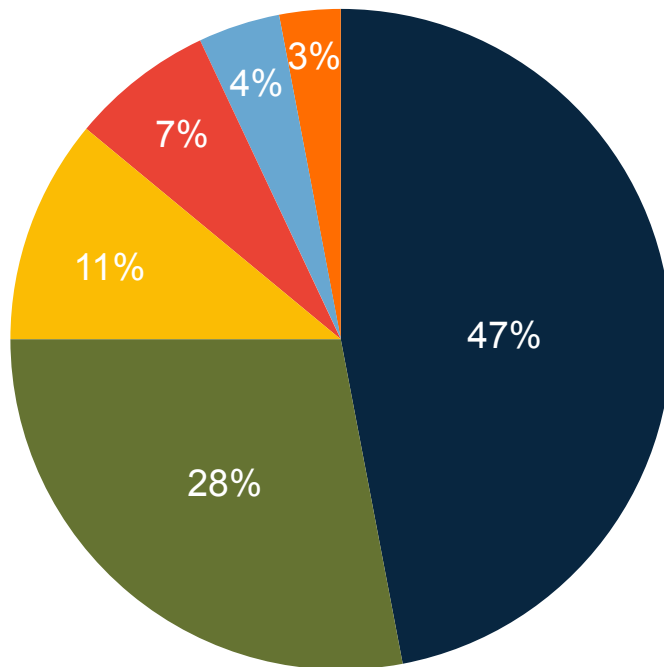
2022 VS 2021

+11%

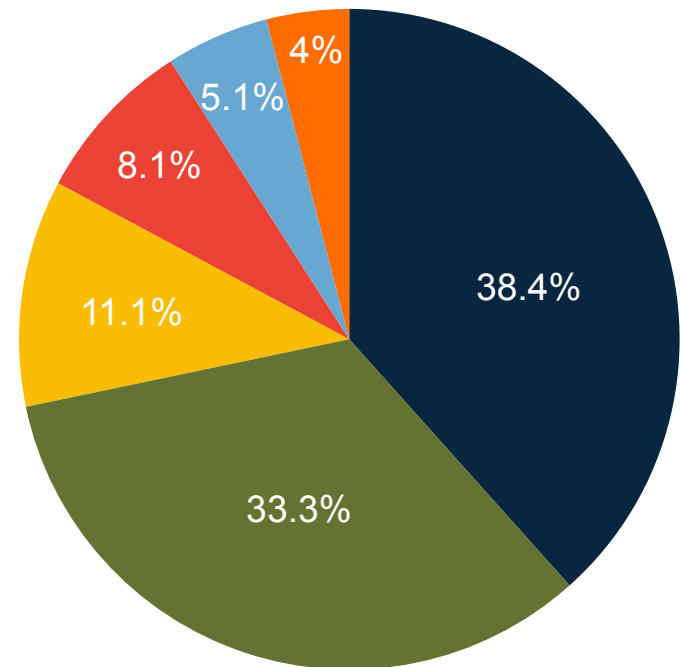
Source: Arizona Travel Impacts, Dean Runyan Associates;
Summary value indicates 2022 value, change value compares to 2021.

SPENDING BY ACCOMMODATION CHOICE

APACHE COUNTY 2021



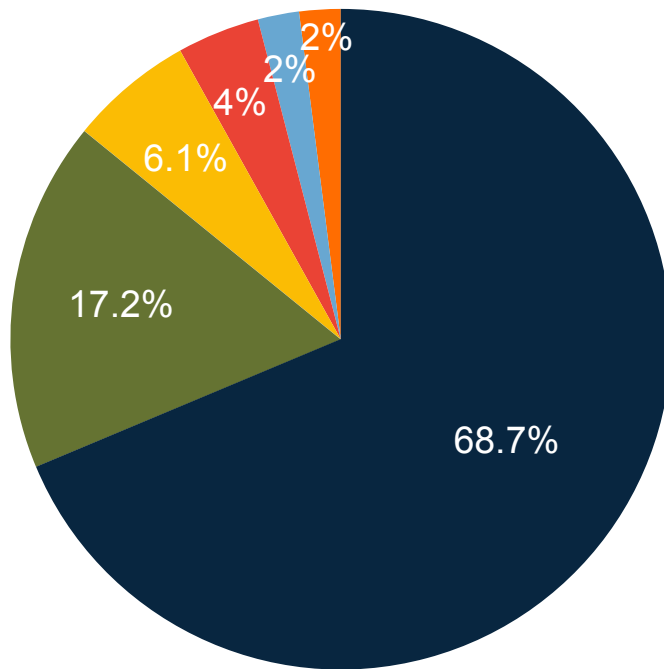
APACHE COUNTY 2022



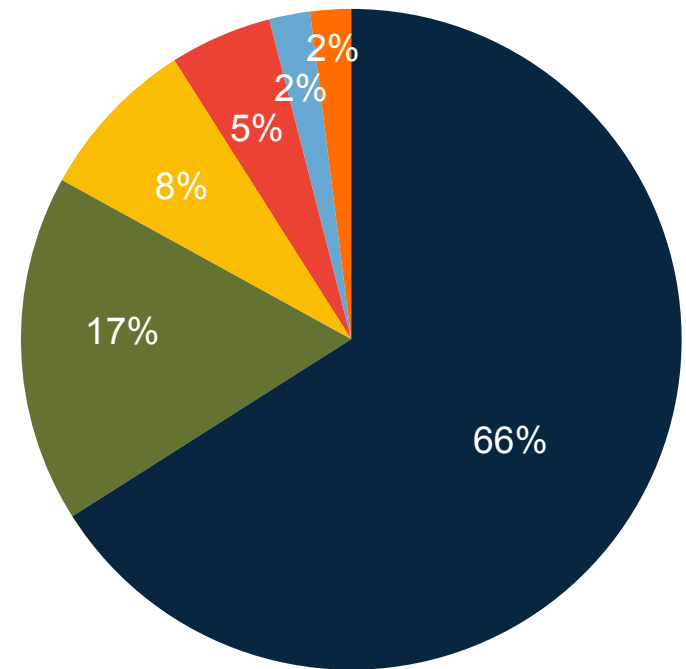
- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

SPENDING BY ACCOMMODATION CHOICE

COCONINO COUNTY 2021



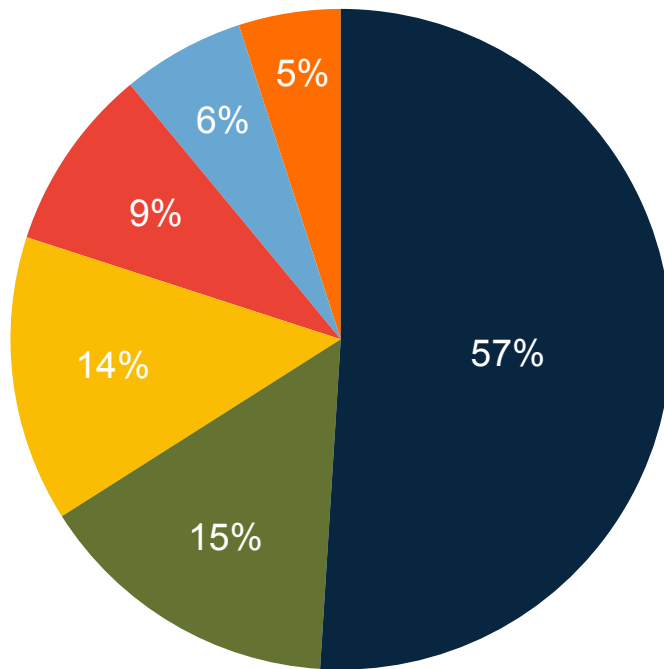
COCONINO COUNTY 2022



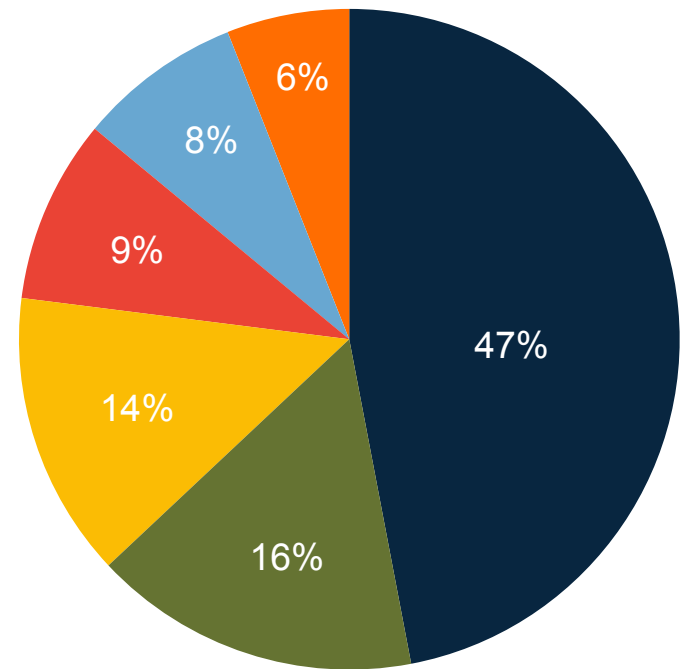
- Hotel, Motel
- Private Home
- Vacation Home
- Campground
- Day Travel
- STVR

SPENDING BY ACCOMMODATION CHOICE

NAVAJO COUNTY 2021



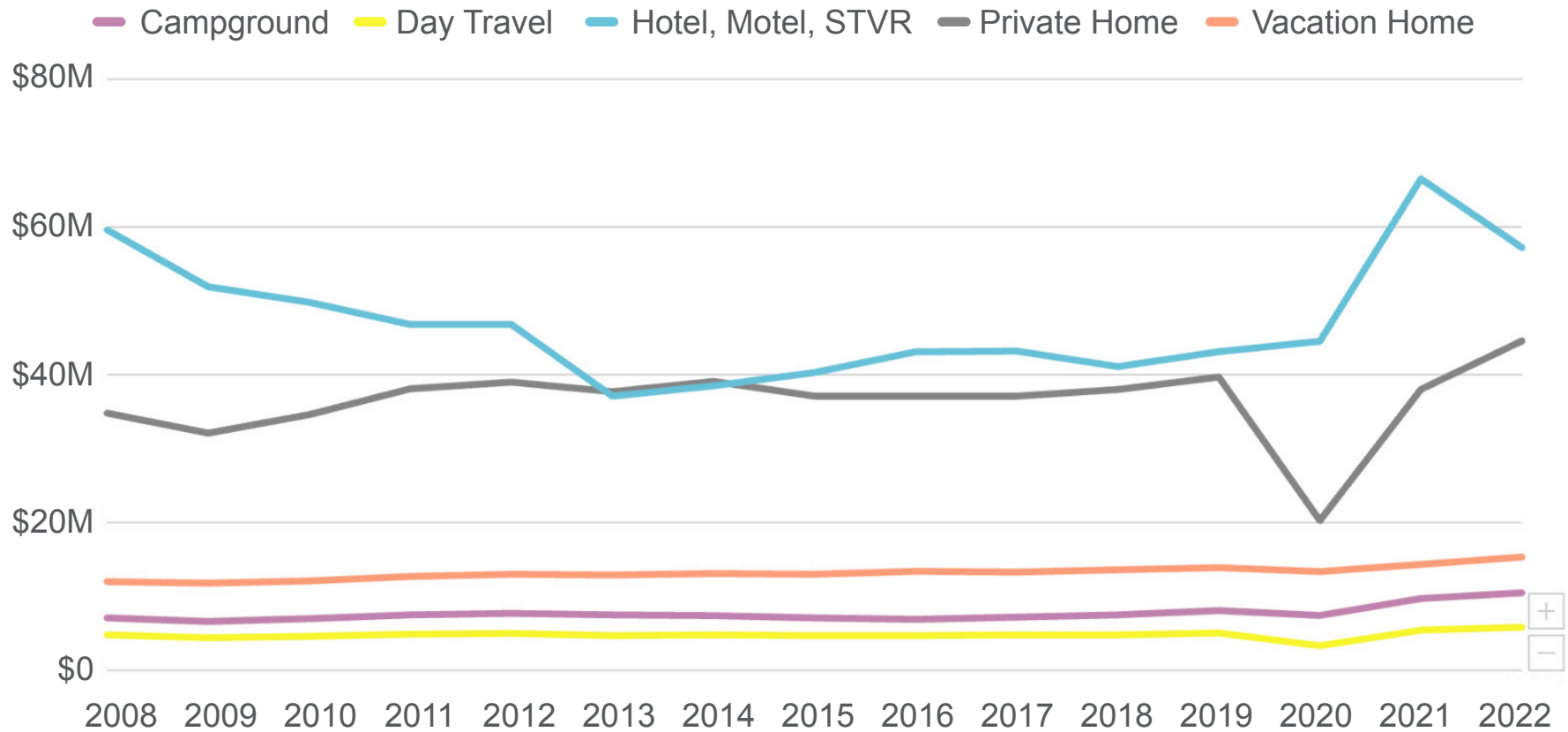
NAVAJO COUNTY 2022



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

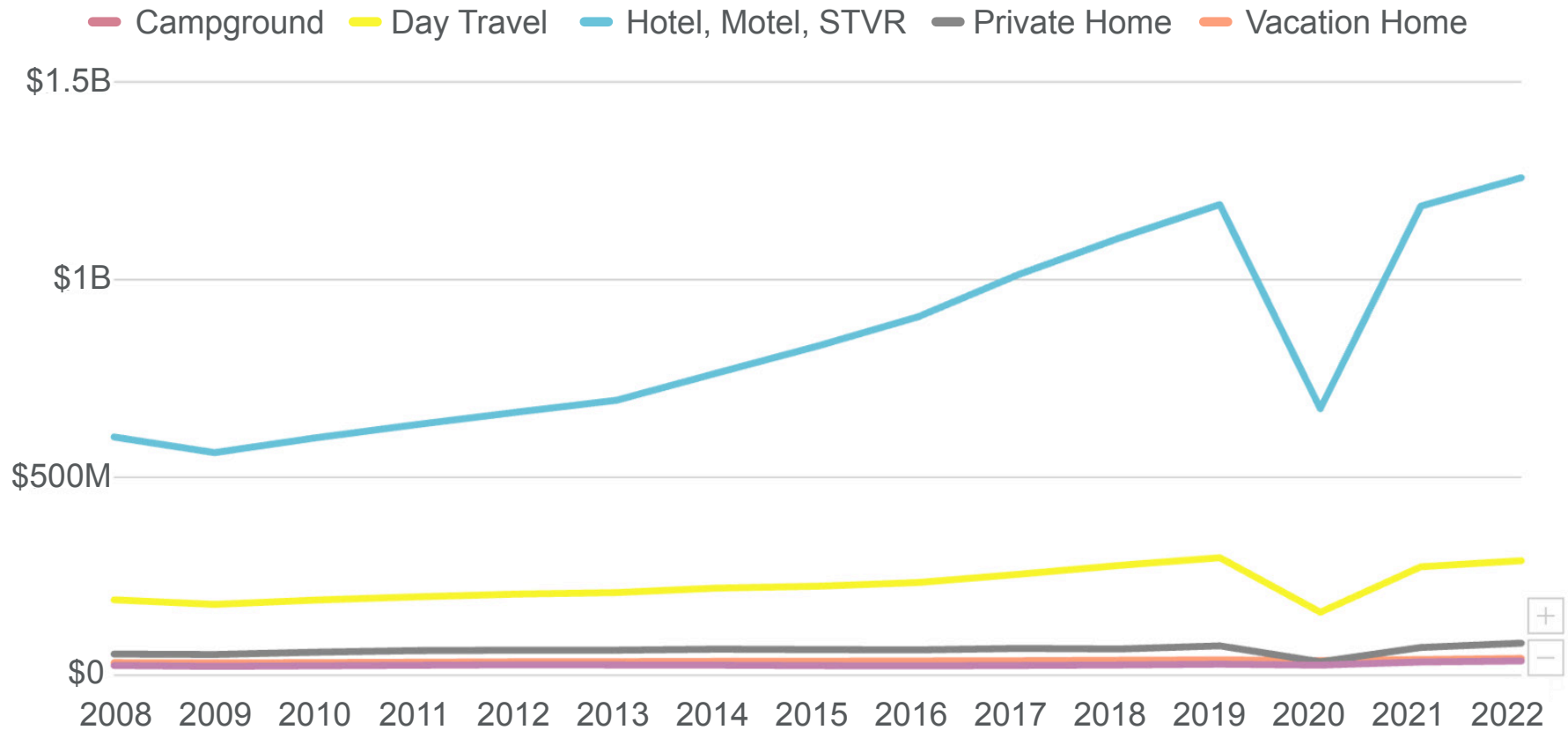
SPENDING BY ACCOMMODATION CHOICE

APACHE COUNTY



SPENDING BY ACCOMMODATION CHOICE

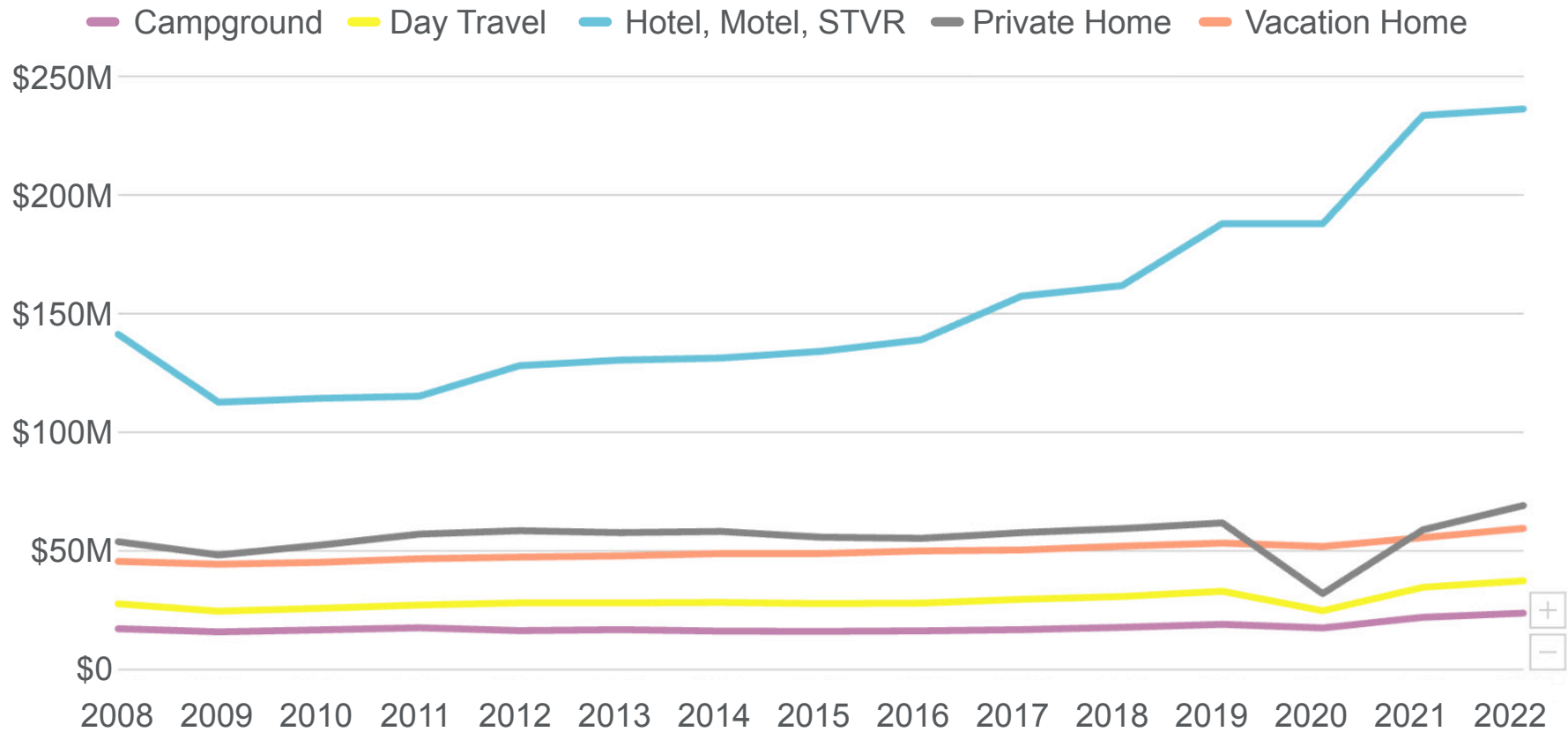
COCONINO COUNTY



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

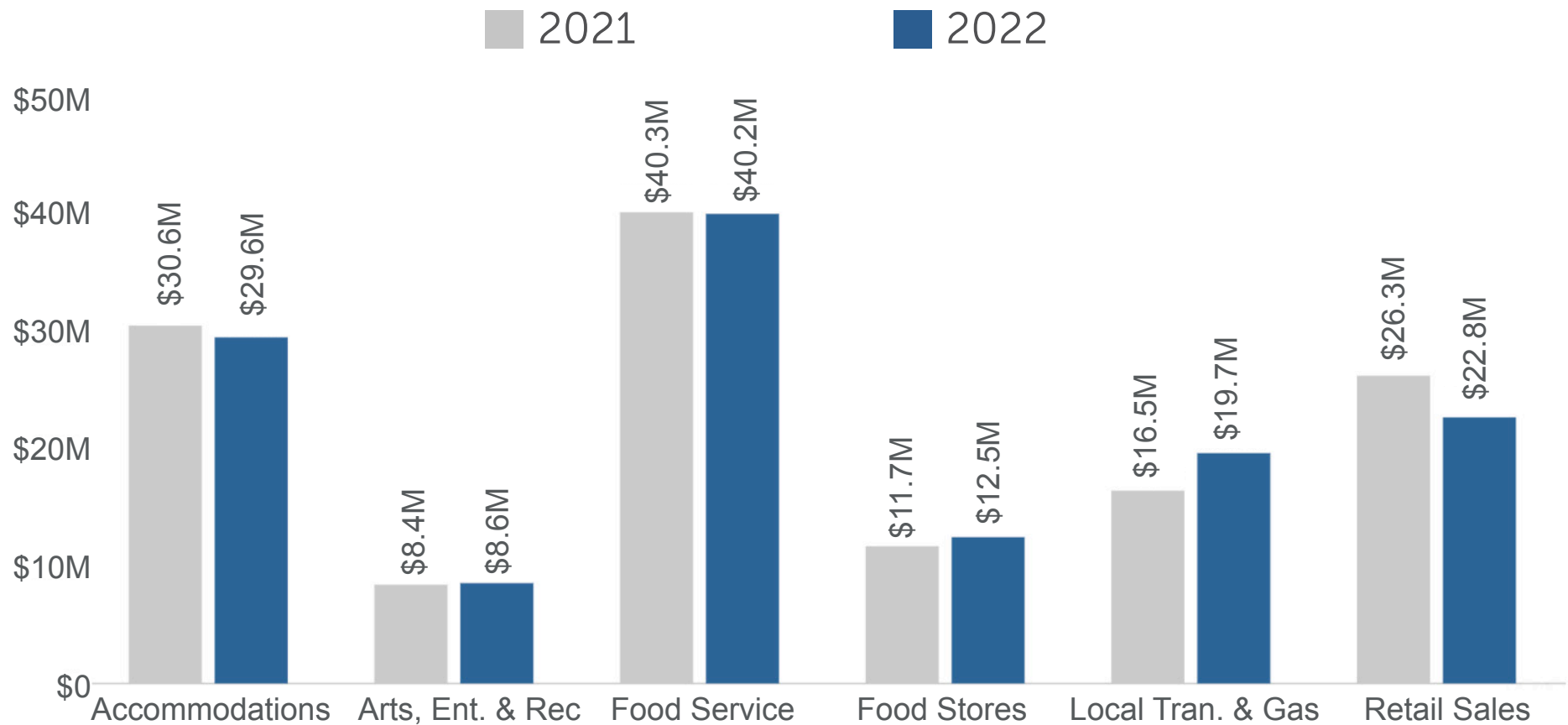
SPENDING BY ACCOMMODATION CHOICE

NAVAJO COUNTY



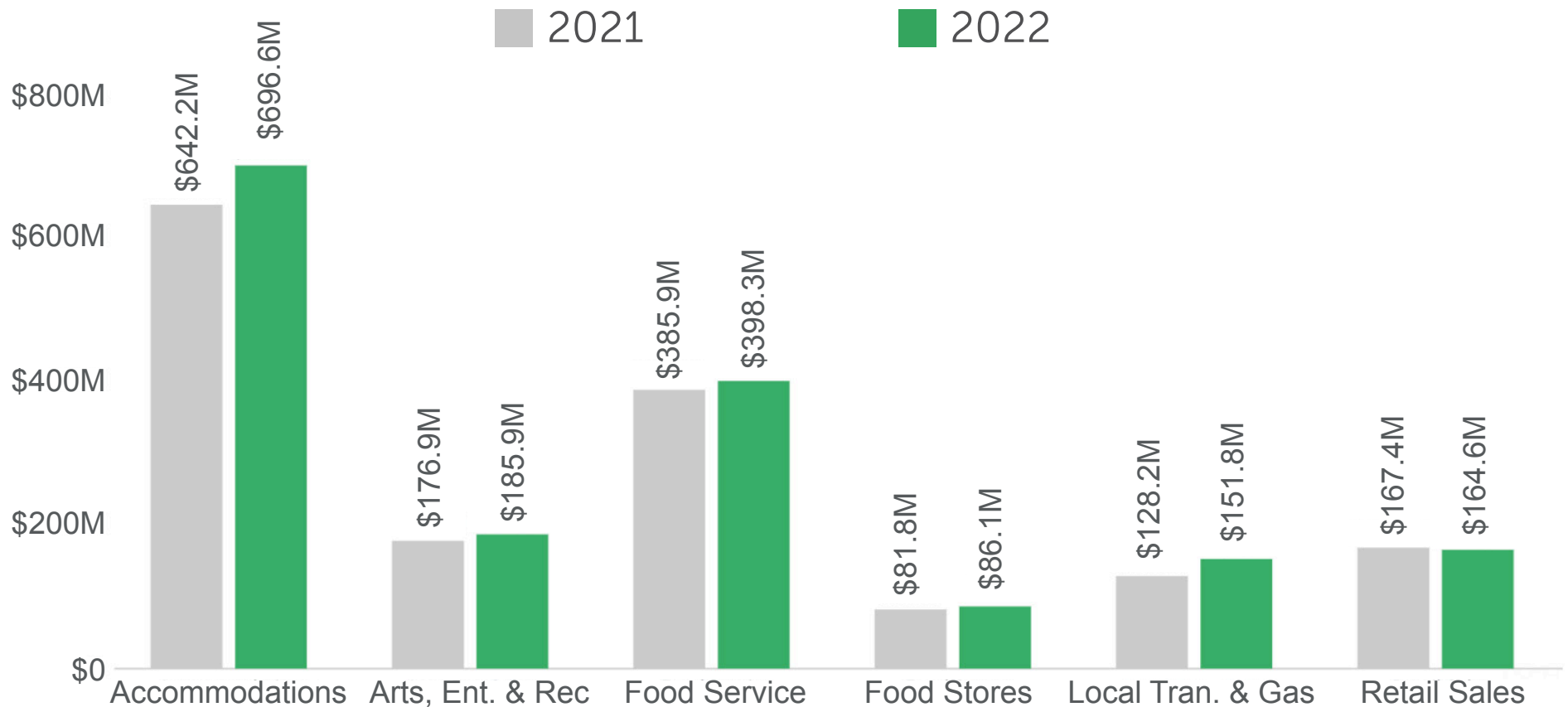
SPENDING BY COMMODITY PURCHASE

APACHE COUNTY



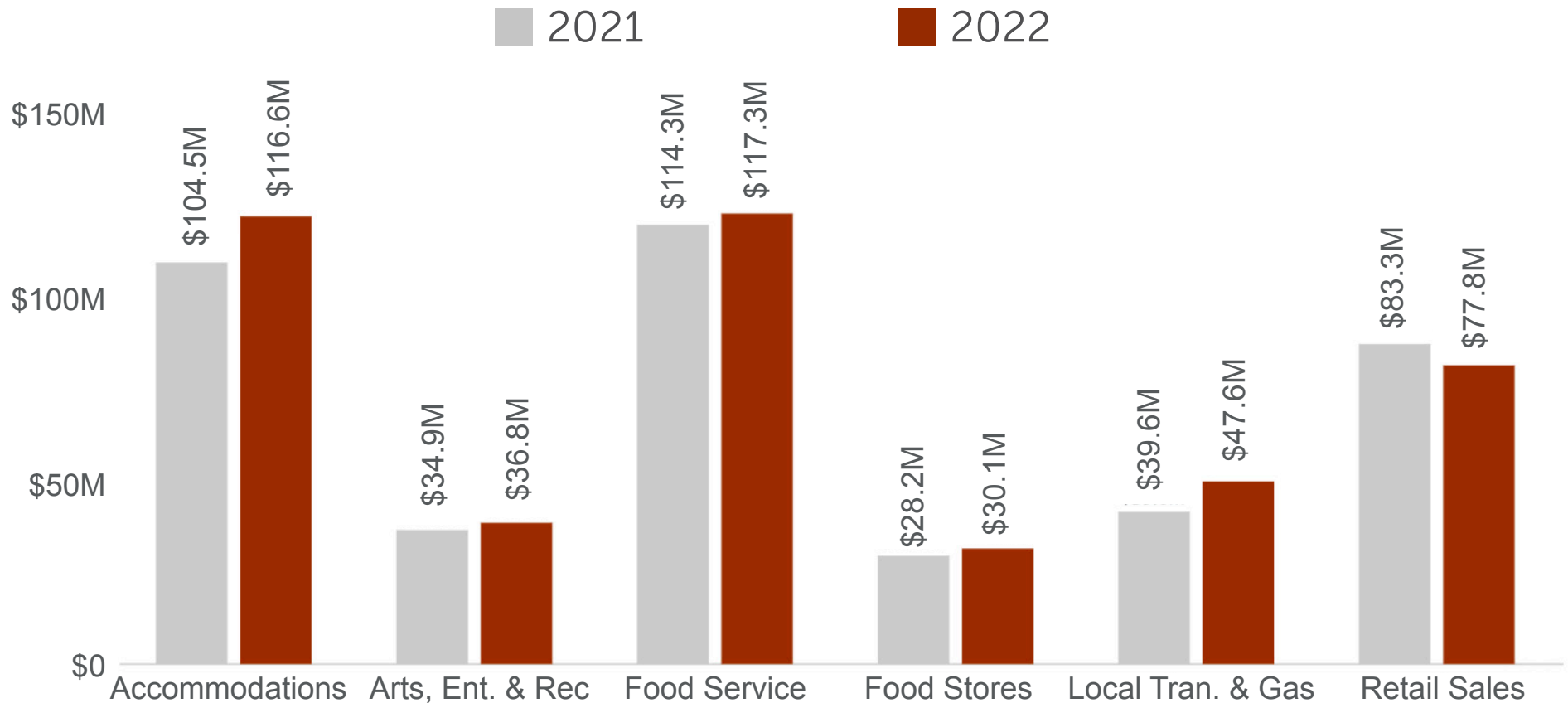
SPENDING BY COMMODITY PURCHASE

COCONINO COUNTY



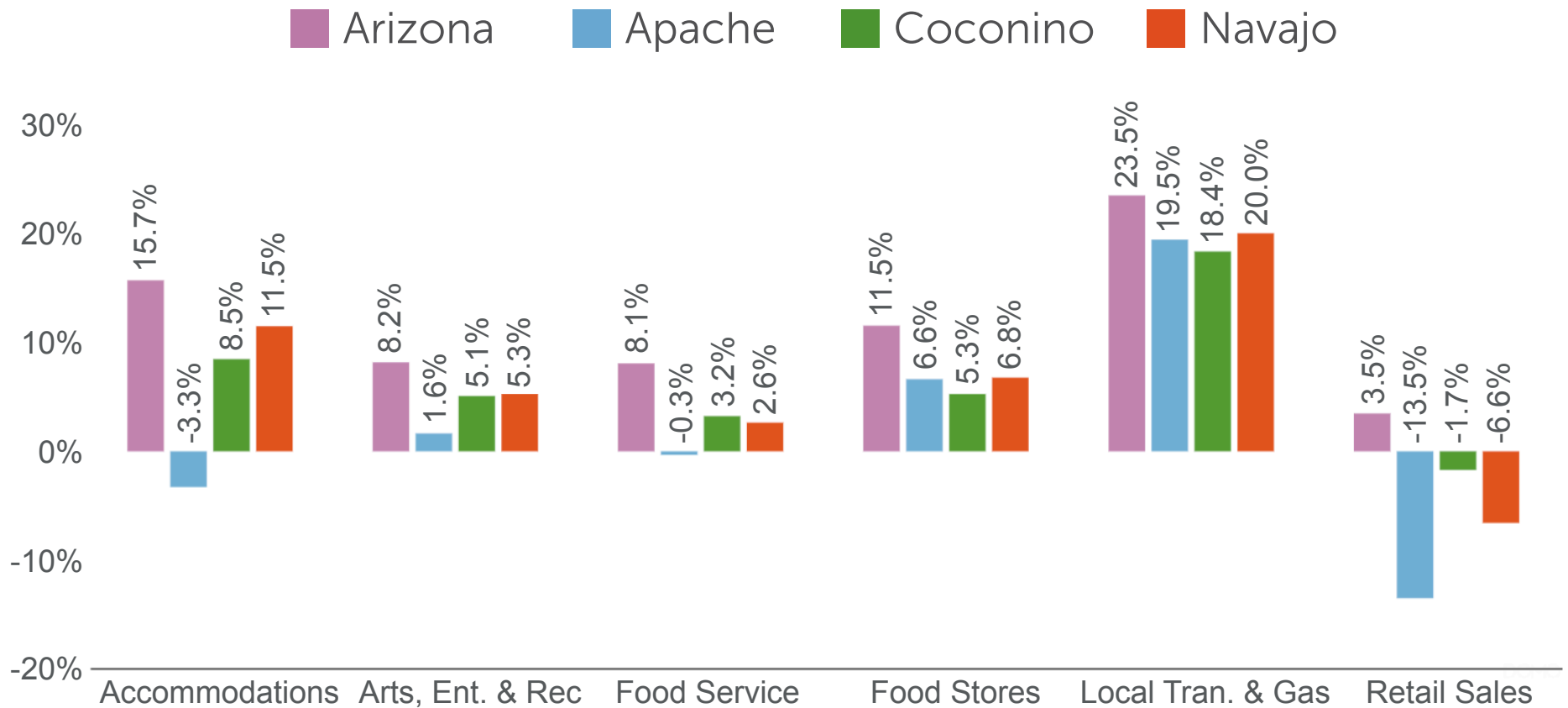
SPENDING BY COMMODITY PURCHASE

NAVAJO COUNTY



SPENDING BY COMMODITY PURCHASE

ALL COUNTIES

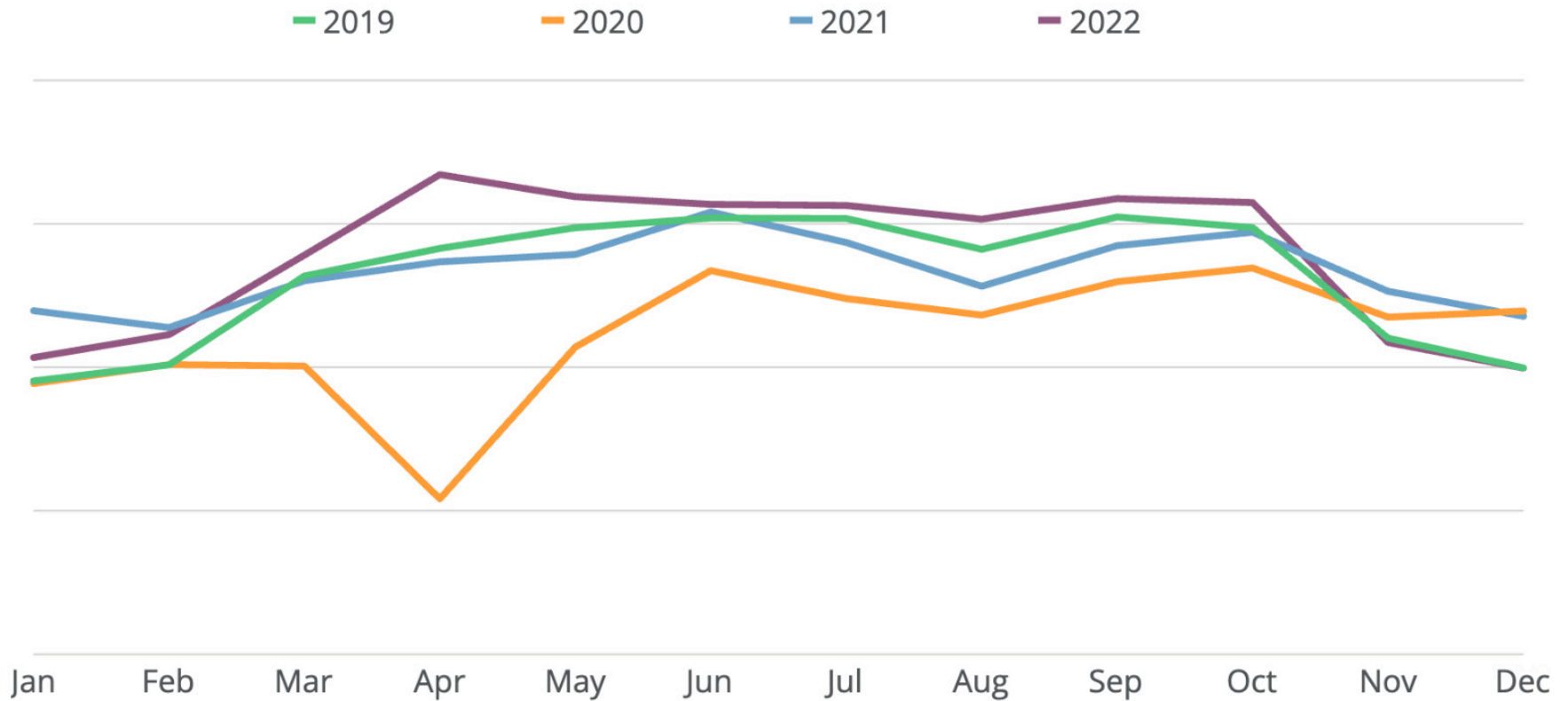


TOURISM INDICATORS

2022
NORTHERN REGION

LODGING OCCUPANCY

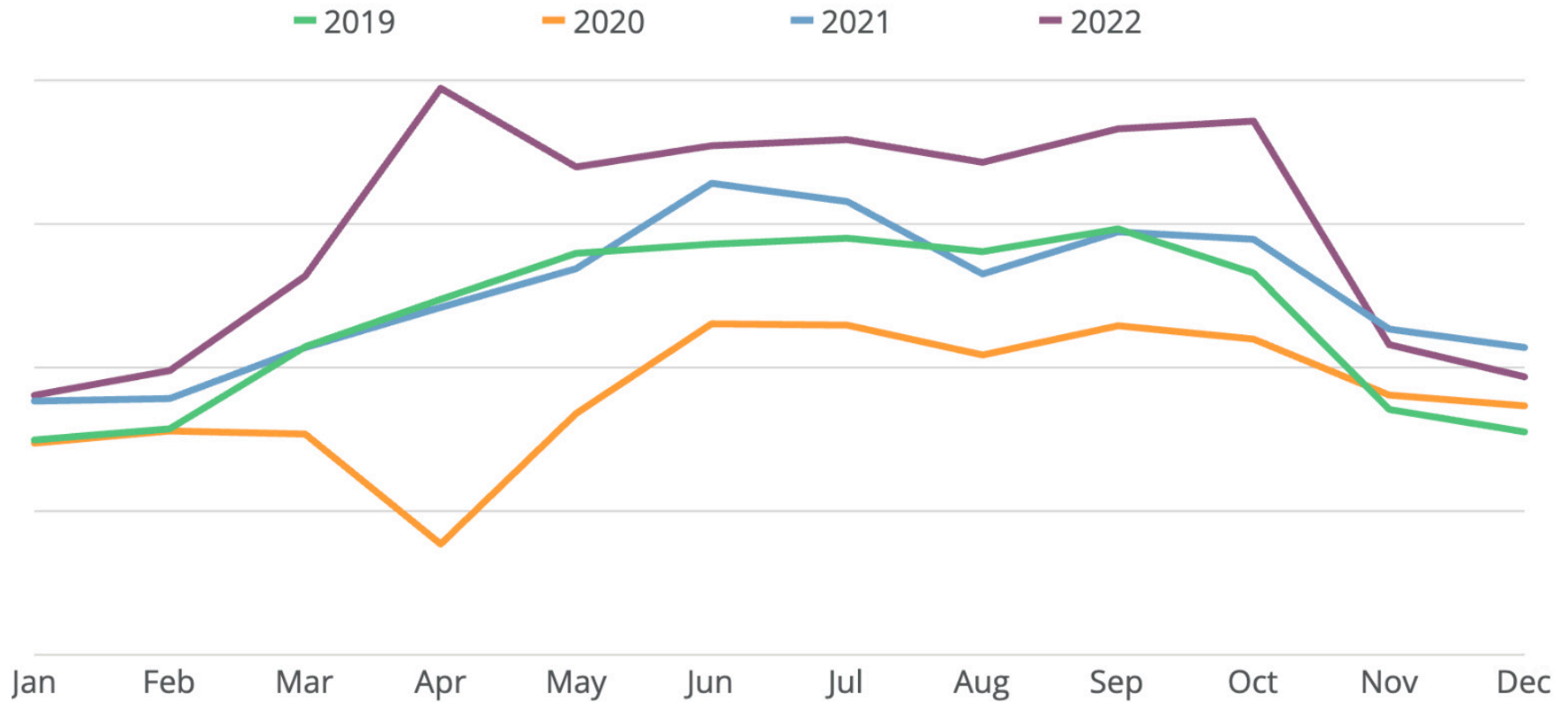
APACHE COUNTY



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

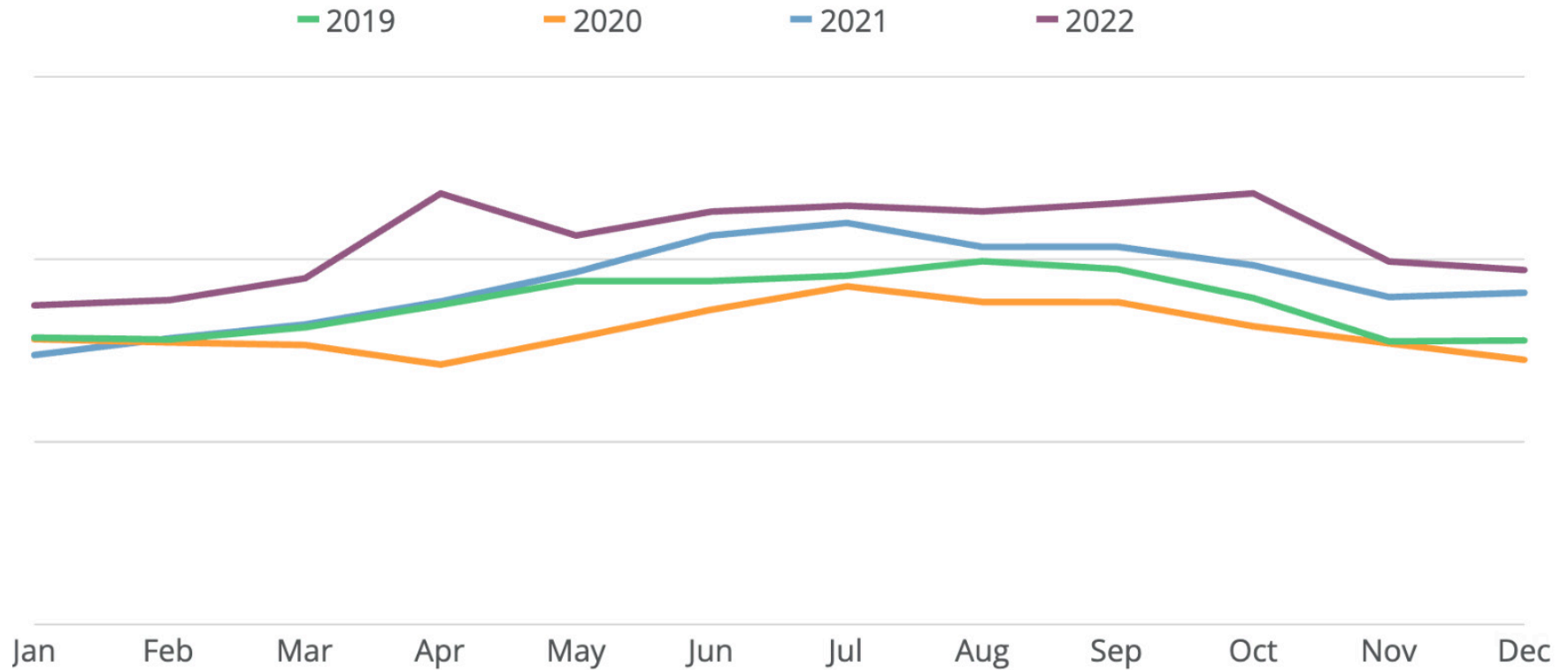
APACHE COUNTY



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

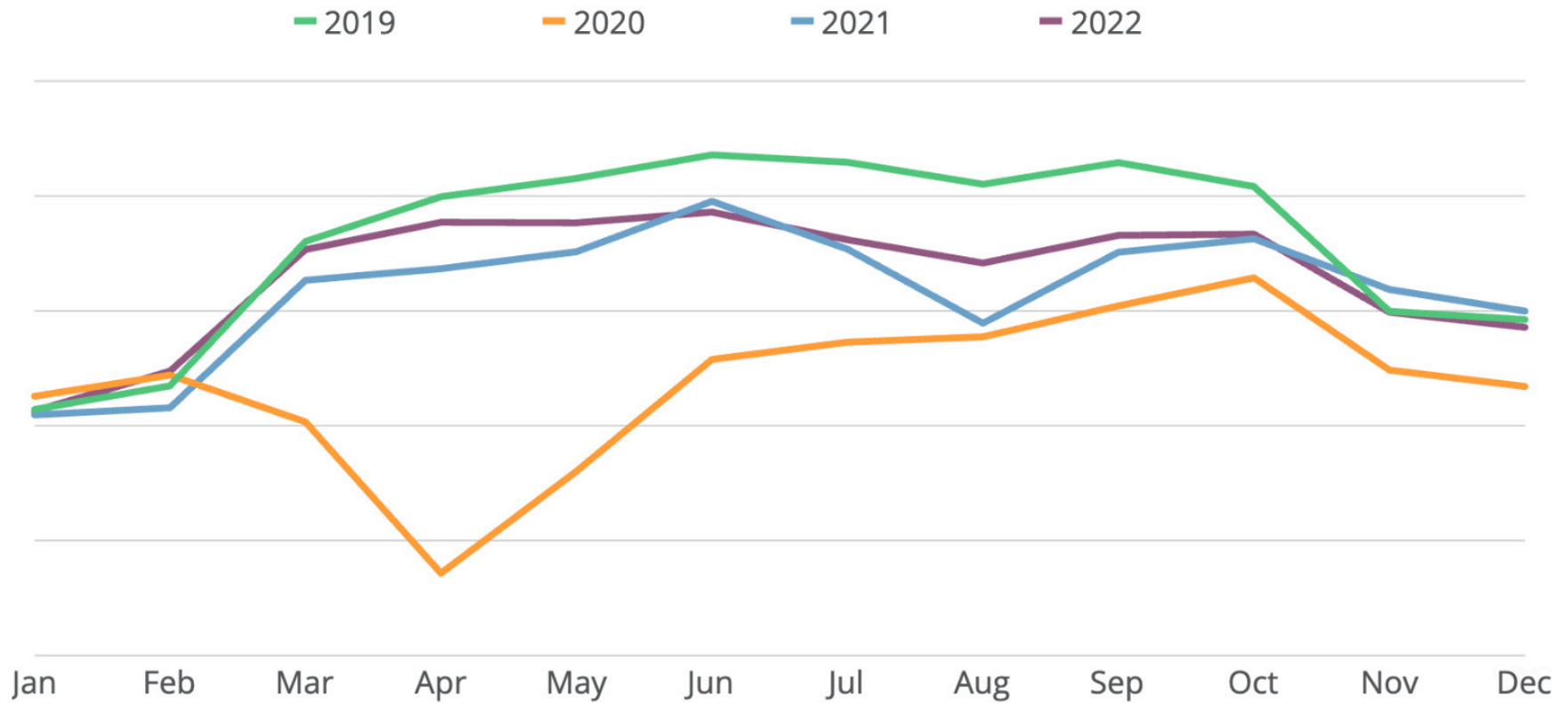
APACHE COUNTY



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

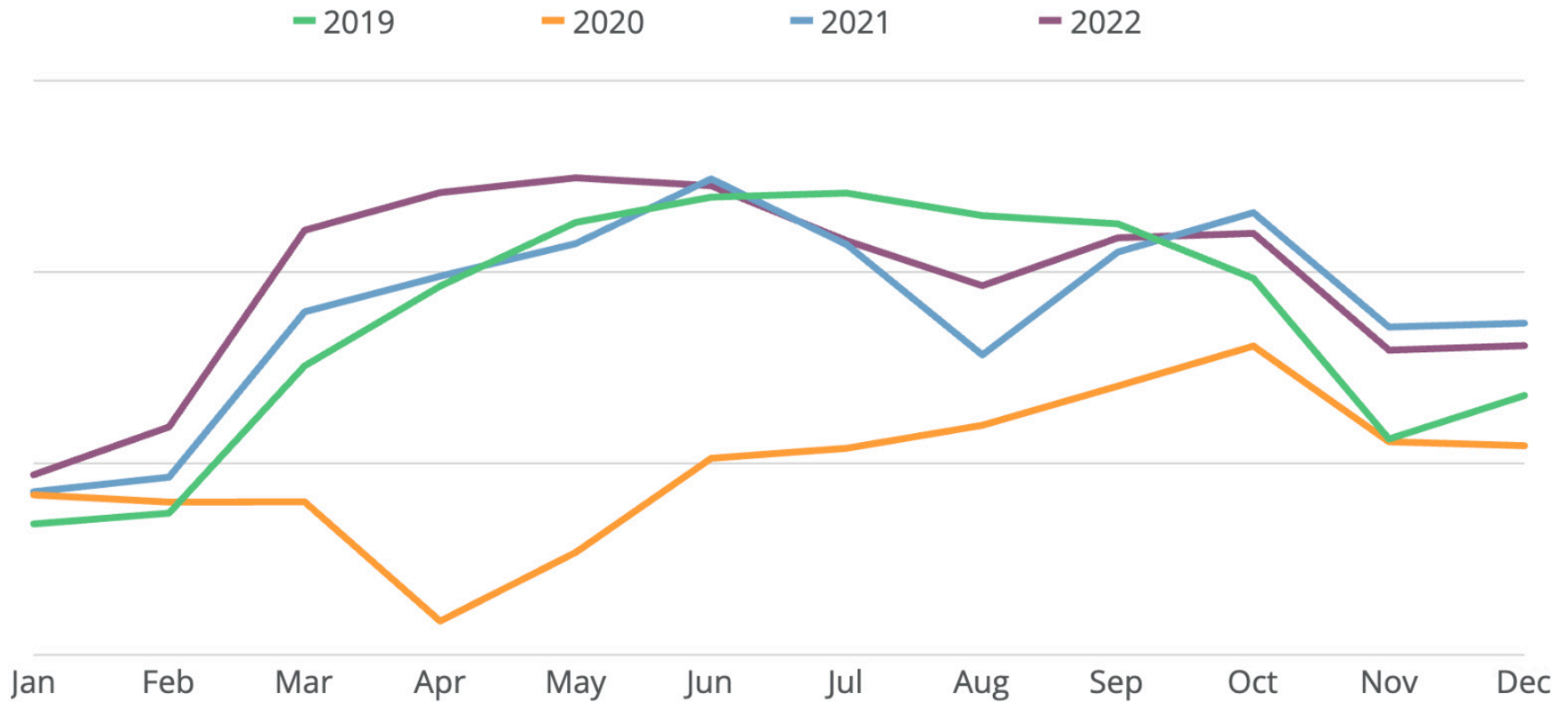
COCONINO COUNTY



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

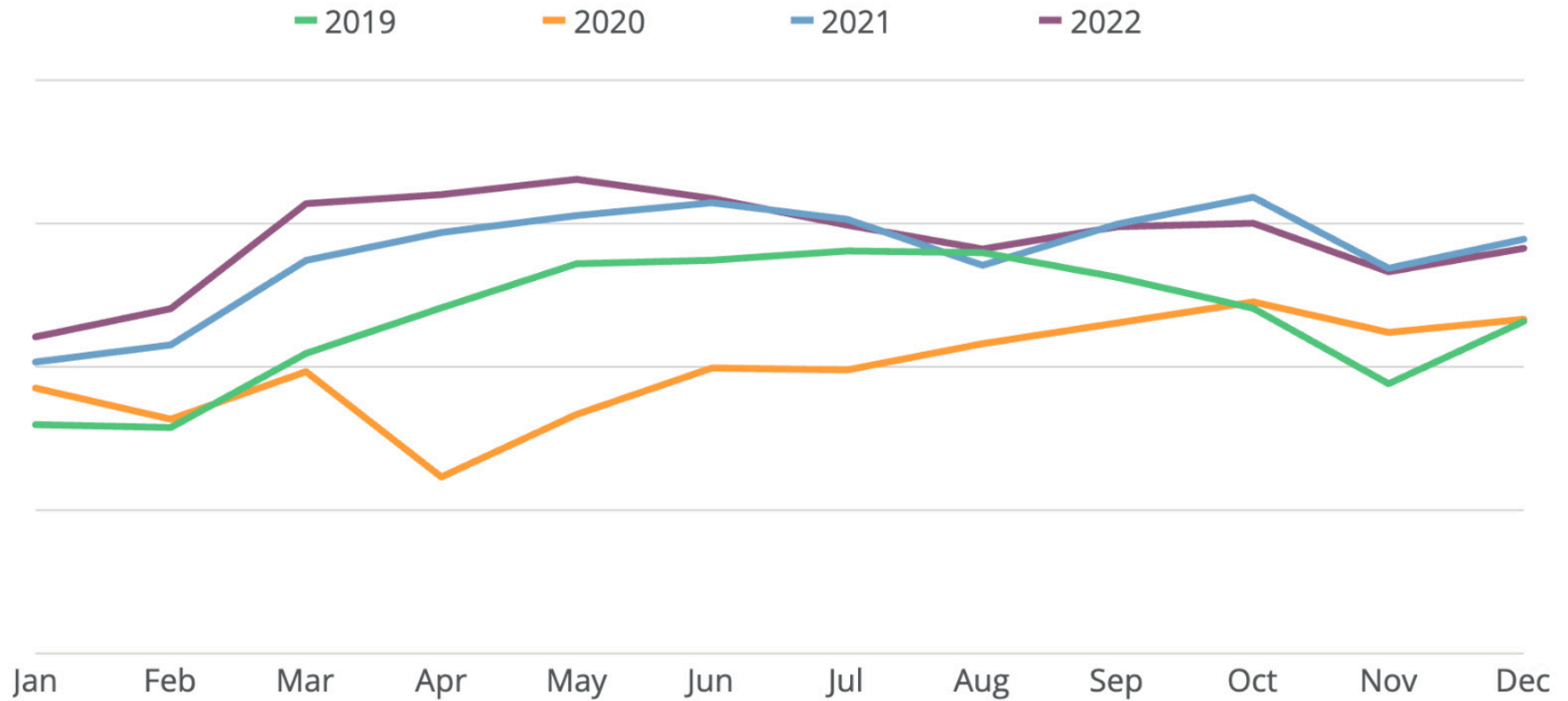
COCONINO COUNTY



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

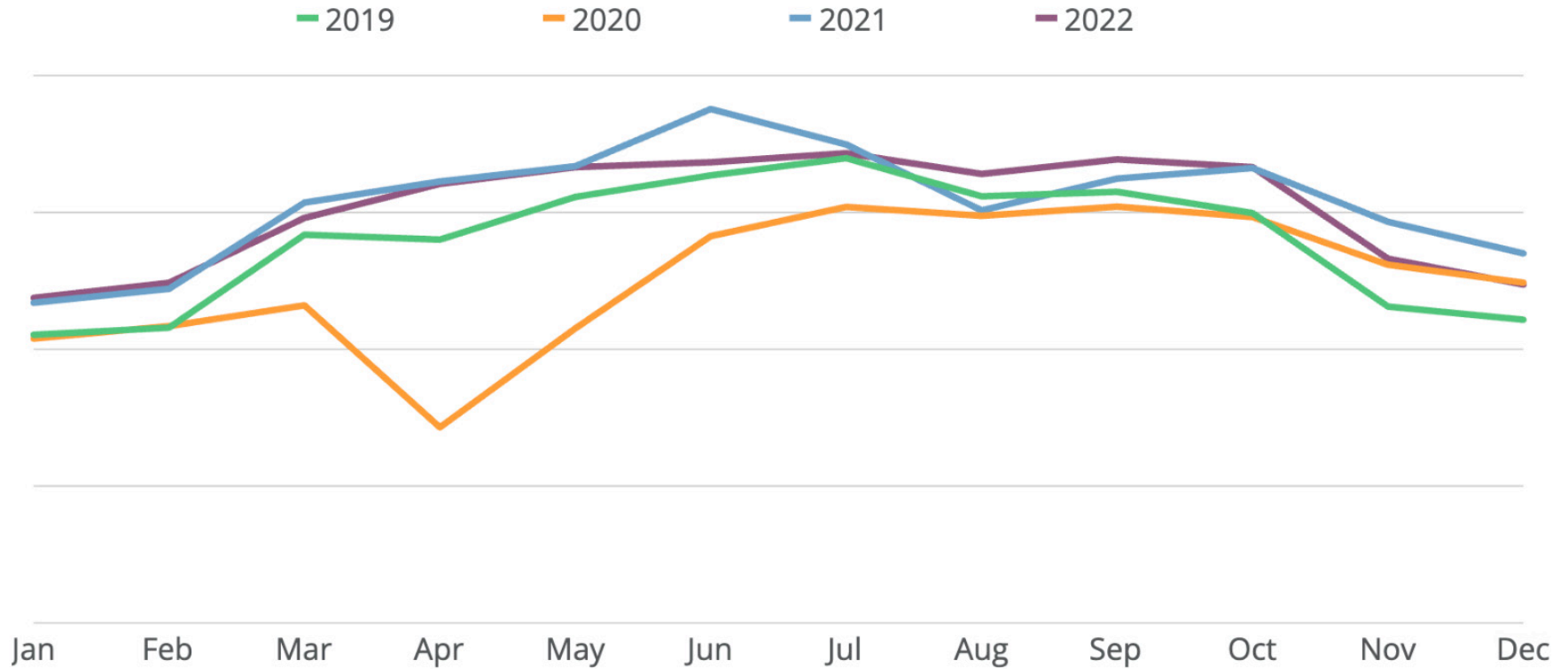
COCONINO COUNTY



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

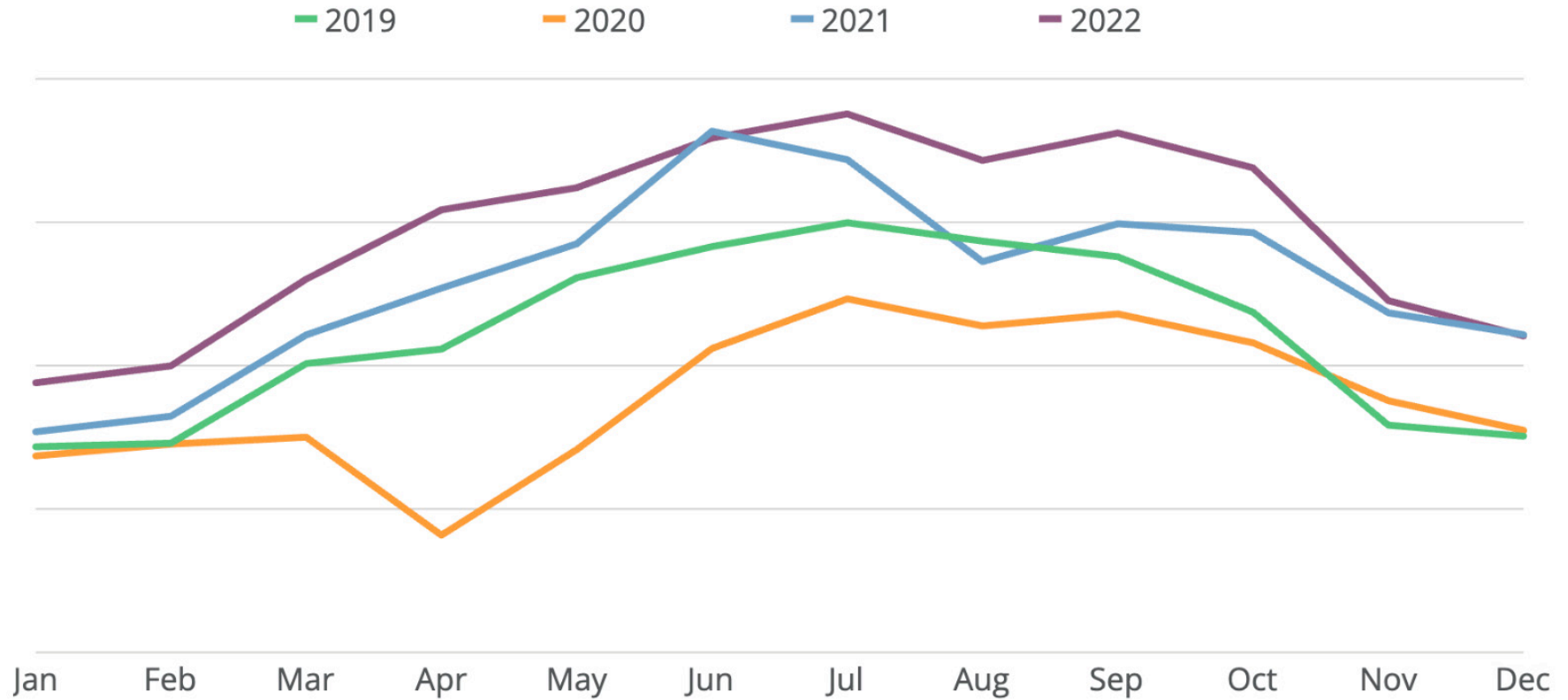
NAVAJO COUNTY



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

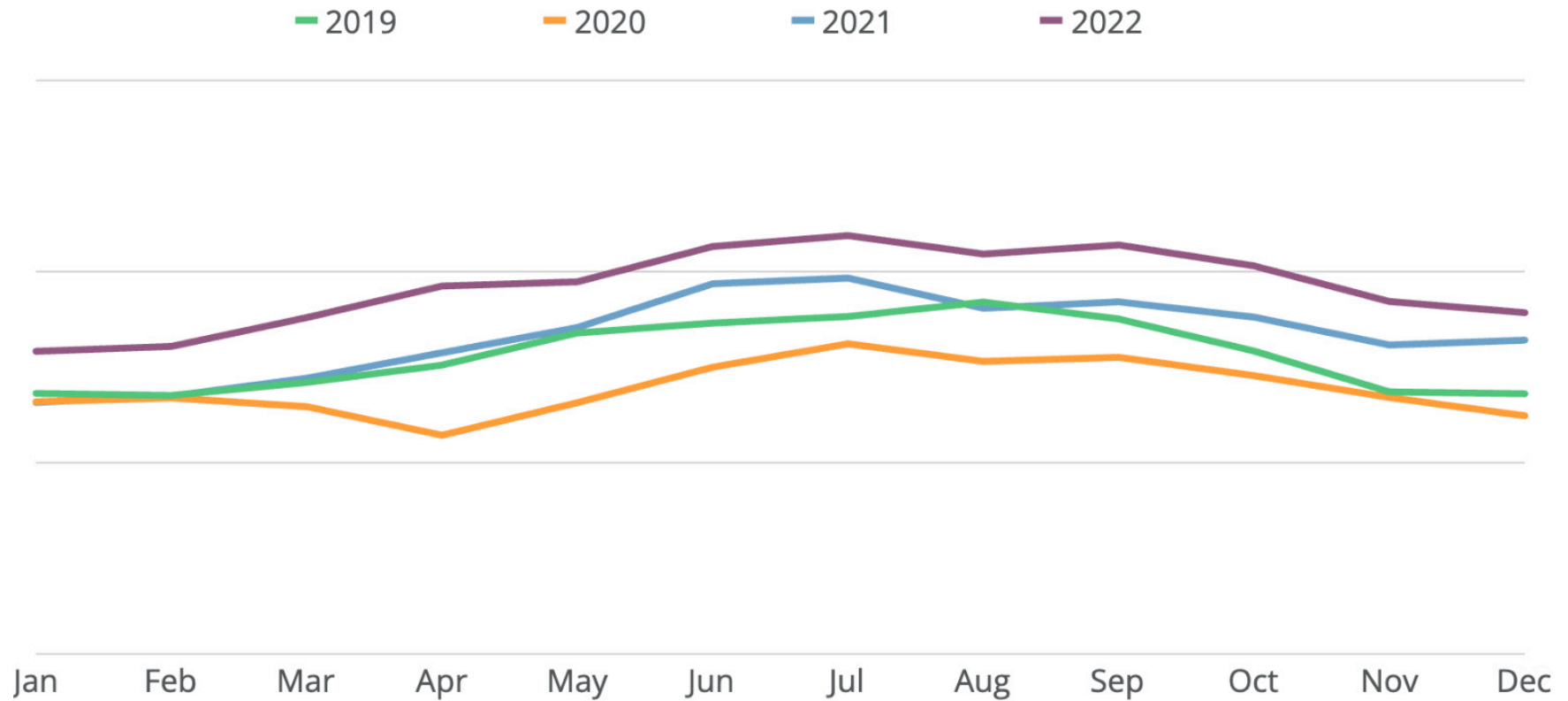
NAVAJO COUNTY



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

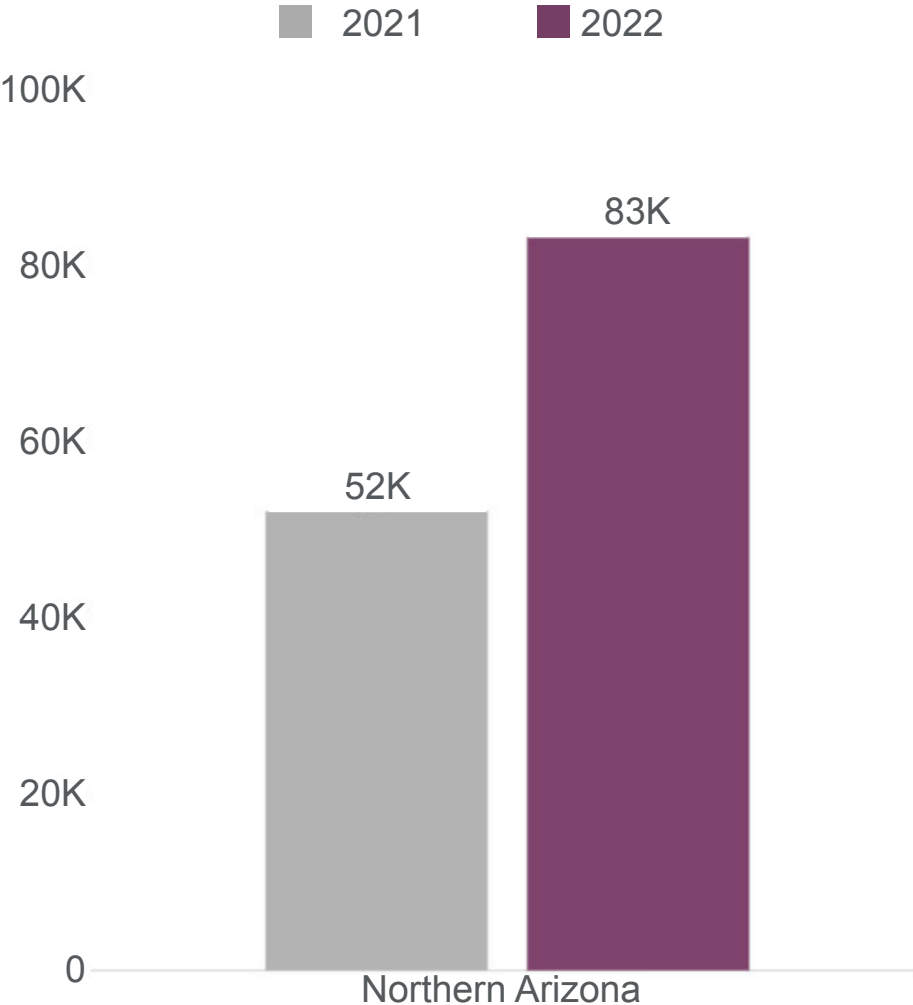
NAVAJO COUNTY



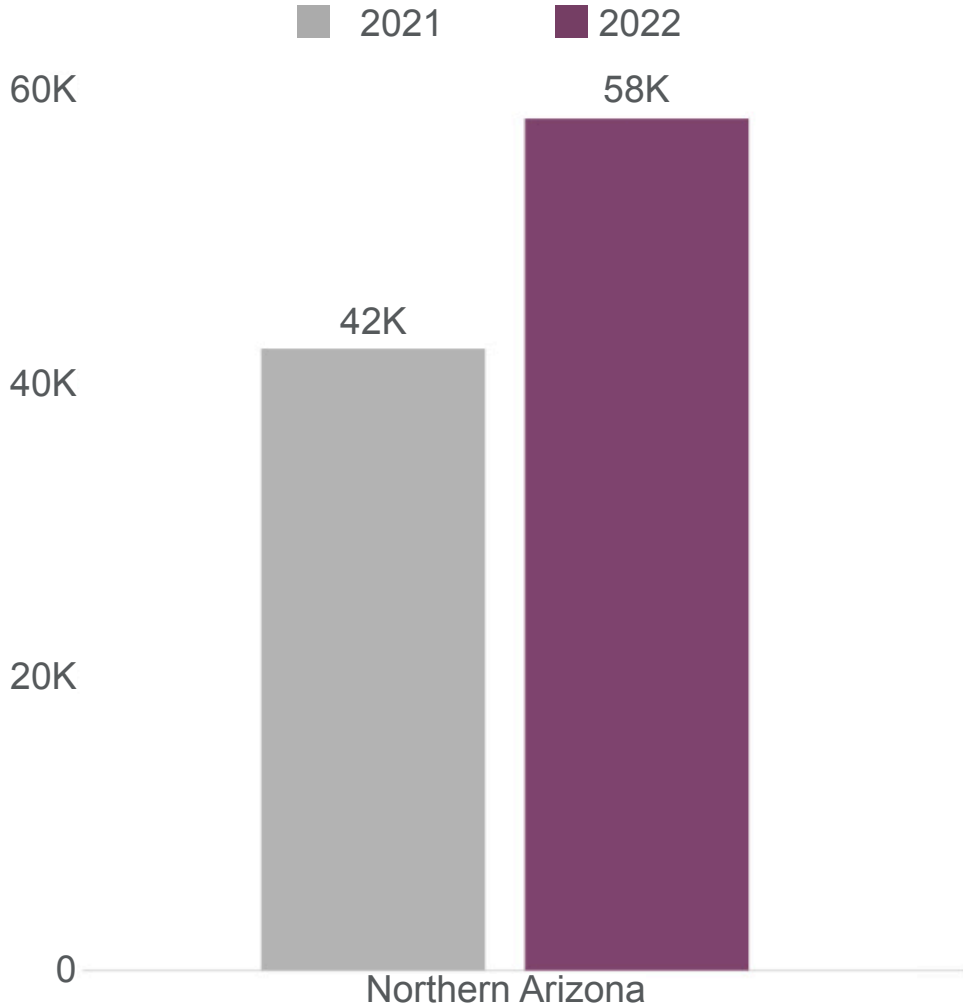
Source: Source: Smith Travel Research, Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

SHORT-TERM RENTALS

Short Term Rental Supply

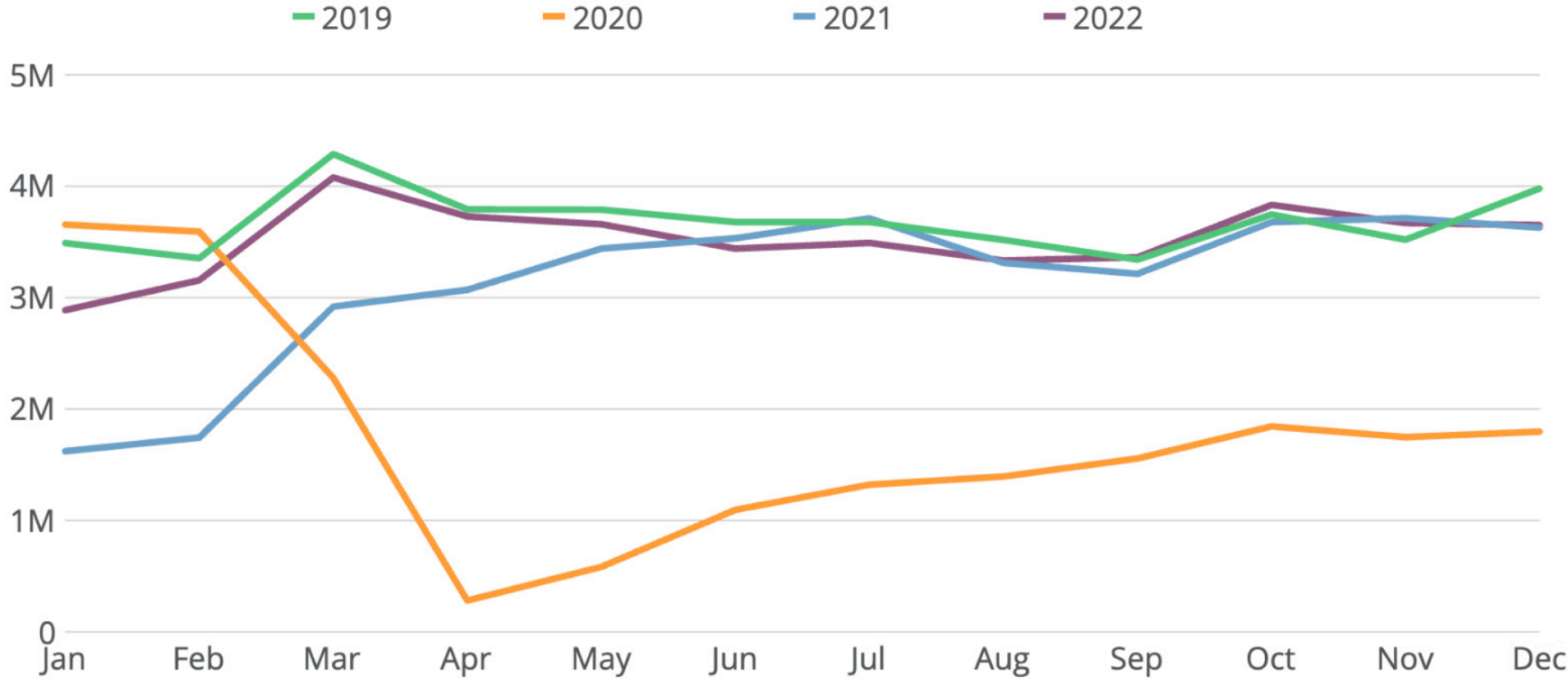


Short Term Rental Demand



Source: Key Data

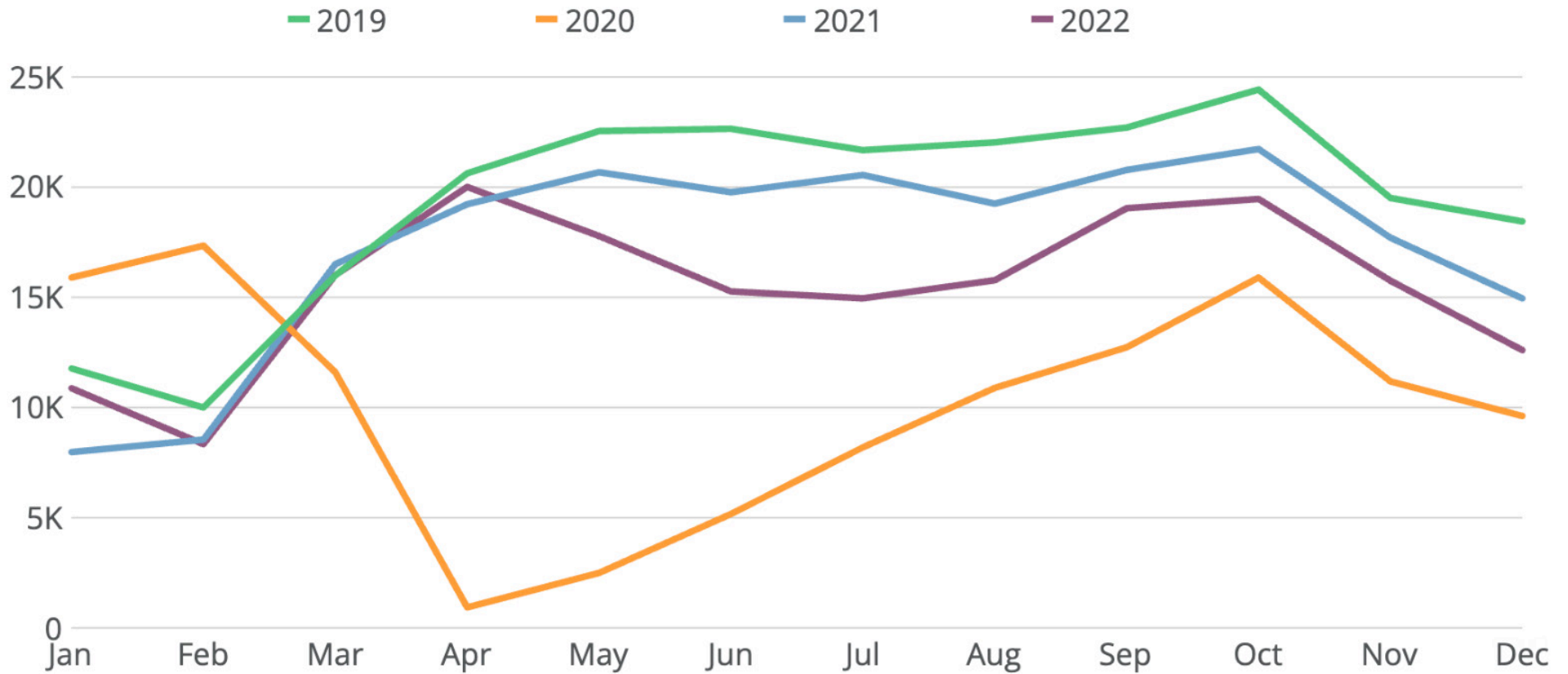
AIRPORT PASSENGER TRAFFIC



Phoenix Sky Harbor - Domestic

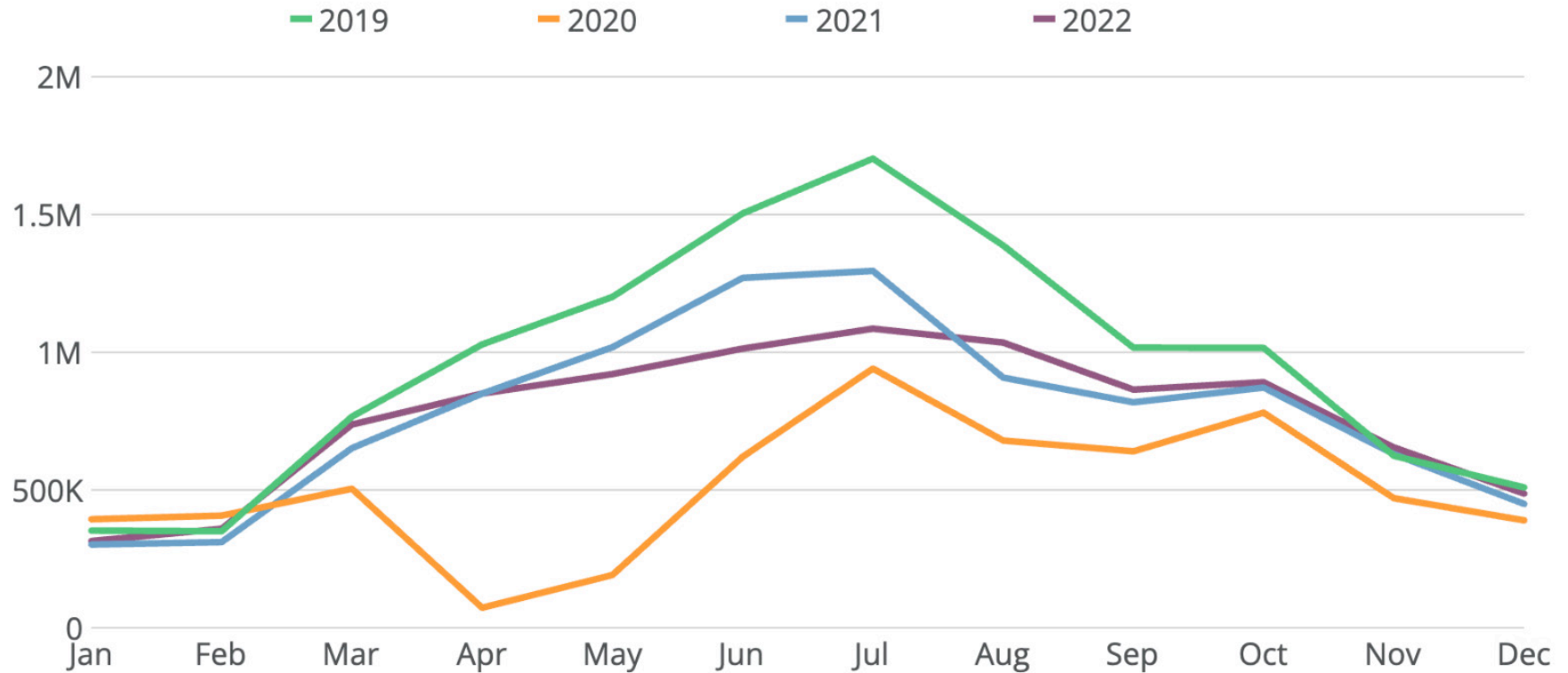
Source: Airport Passenger Traffic, Northern Arizona University, Arizona Airports

AIRPORT PASSENGER TRAFFIC



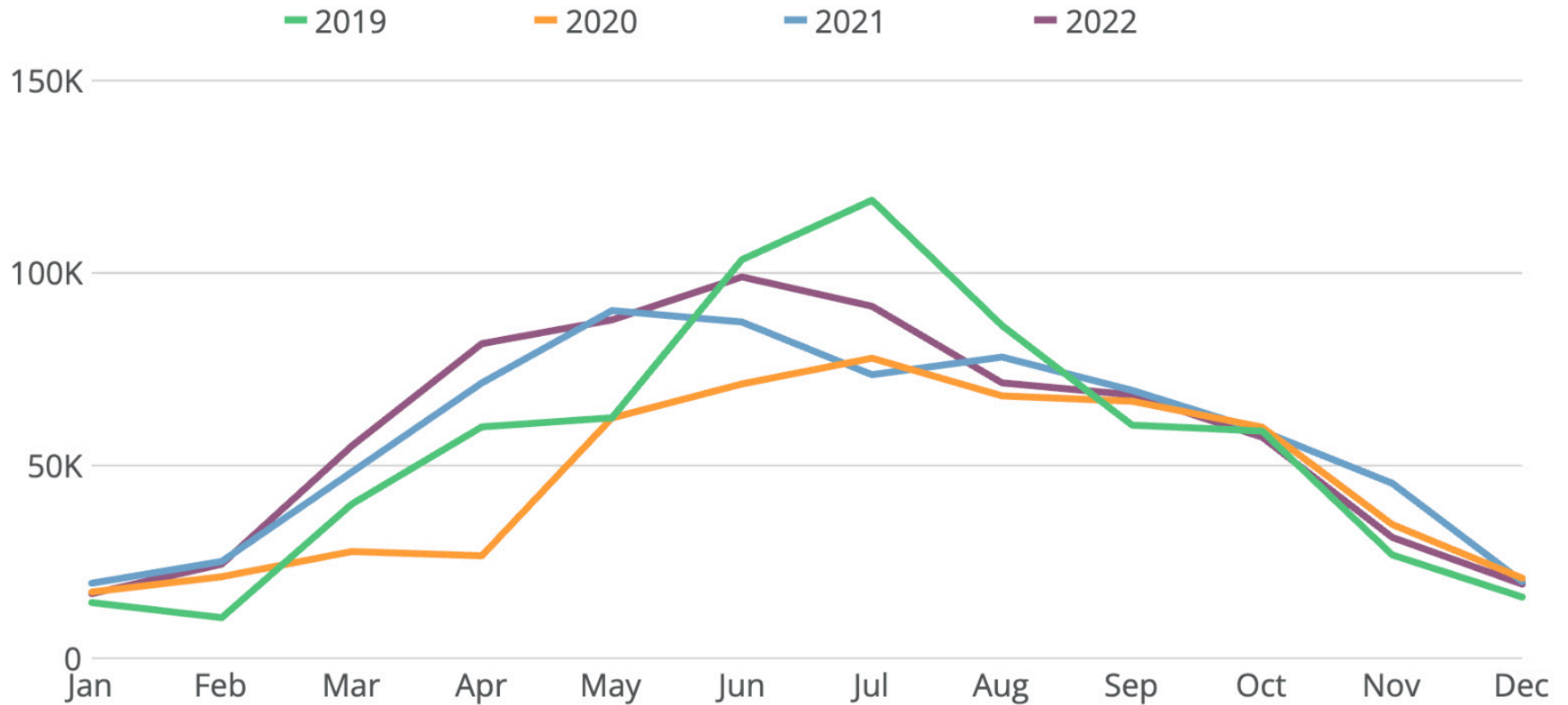
Northern Region -- Includes: Flagstaff, Pullman, Page Municipal, Show Low Regional Airports

NATIONAL PARK VISITATION



Includes: Canyon de Chelly NM, Glen Canyon NRA, Grand Canyon NP, Hubbell Trading Post NHS, Navajo NM, Petrified Forest NP, Sunset Crater Volcano NM, Walnut Canyon NM, and Wupatki NM

STATE PARK VISITATION

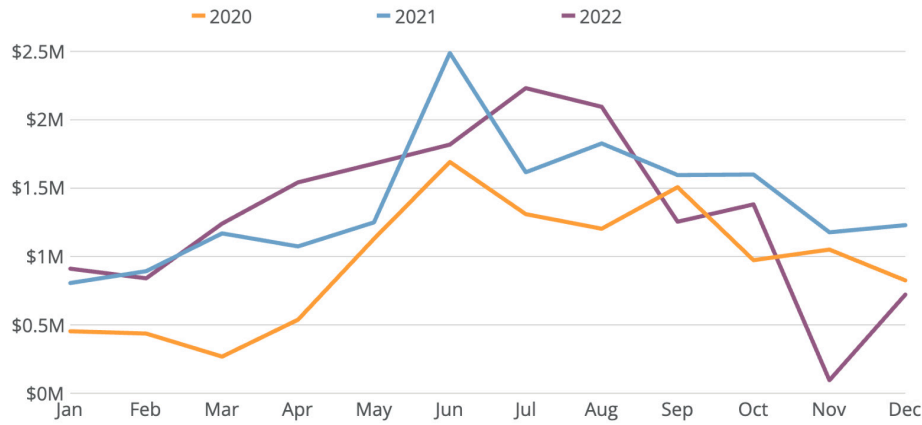


Includes: Fool Hollow Lake RA, Homolovi, Lyman Lake, Riordan Mansion, and Slide Rock State Parks

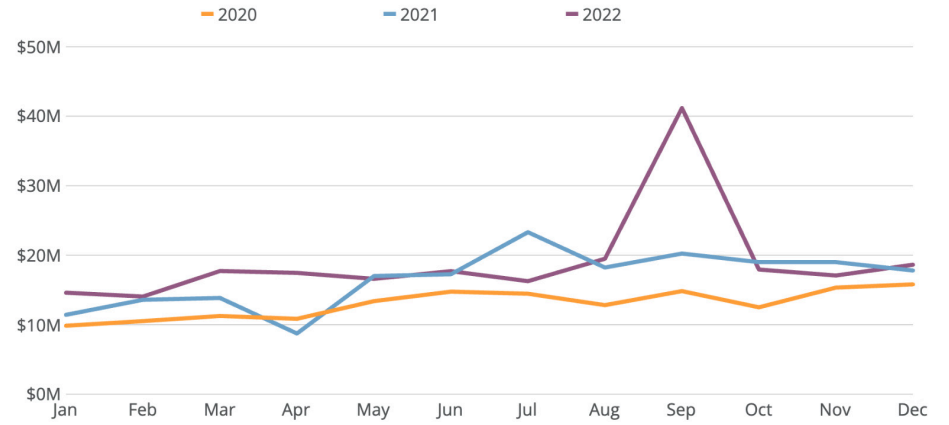
GROSS SALES

APACHE COUNTY

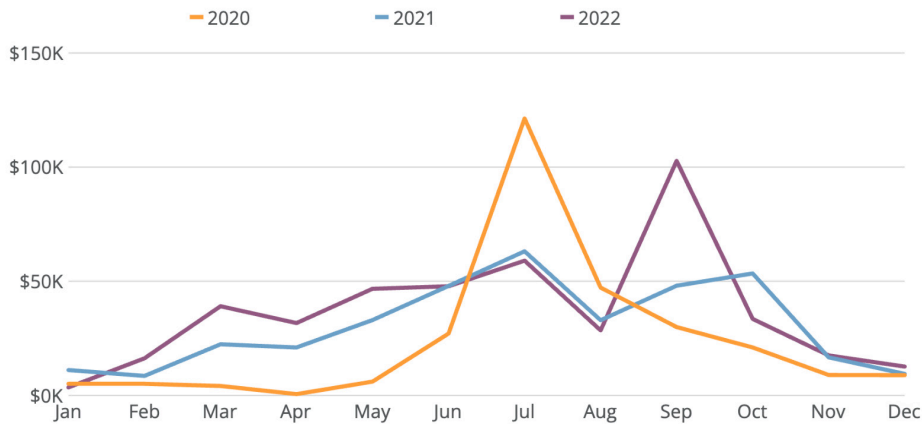
Lodging



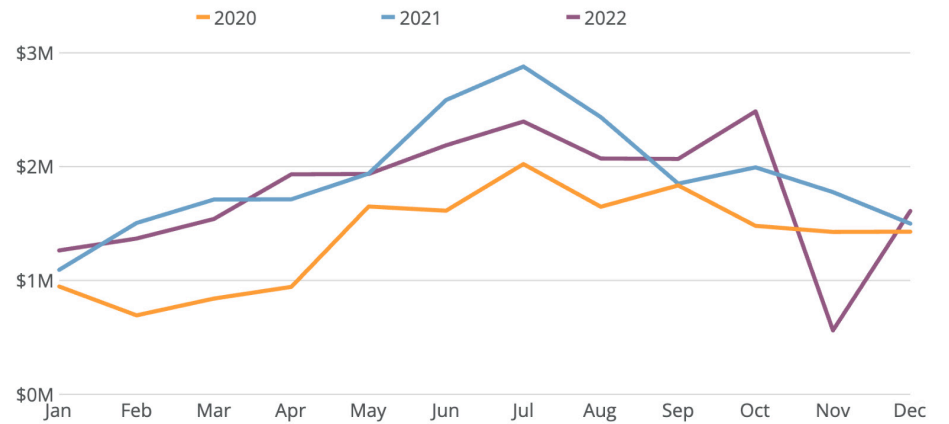
Retail



Amusement



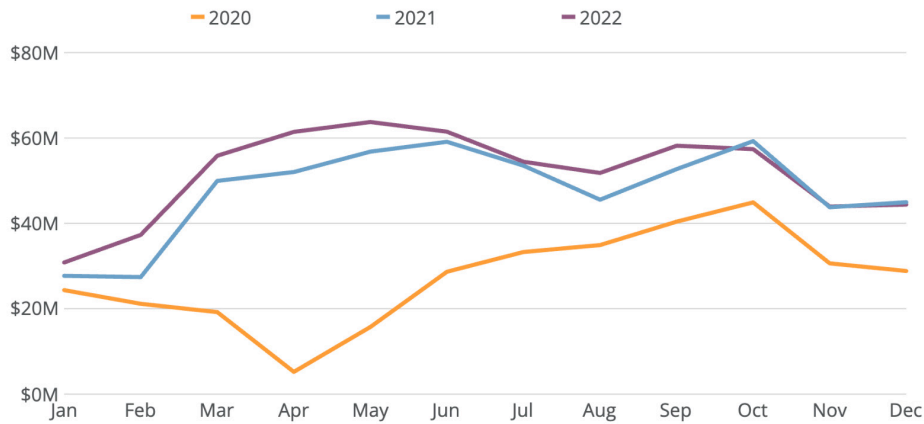
Restaurant/Bar



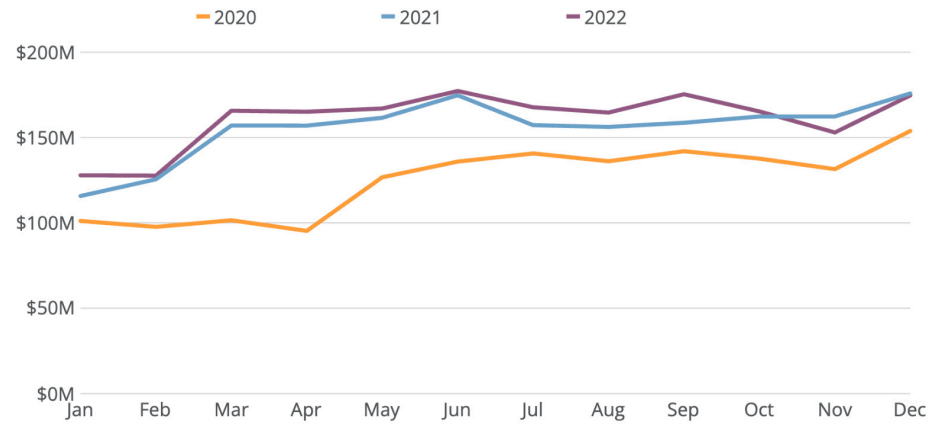
GROSS SALES

COCONINO COUNTY

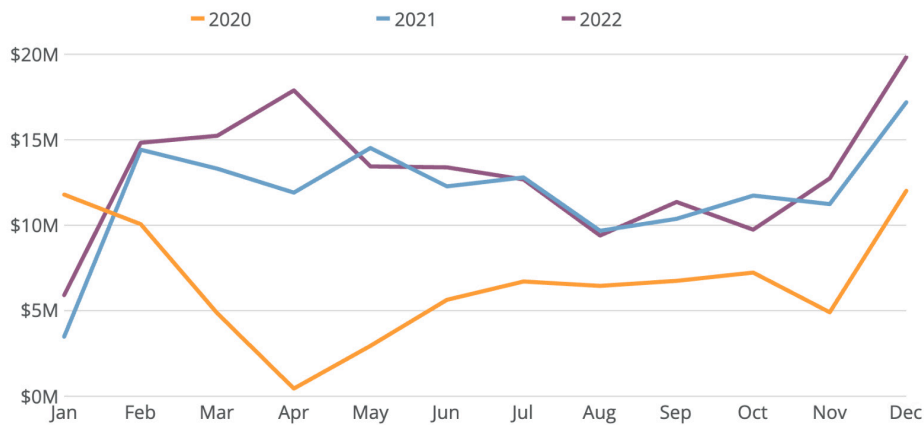
Lodging



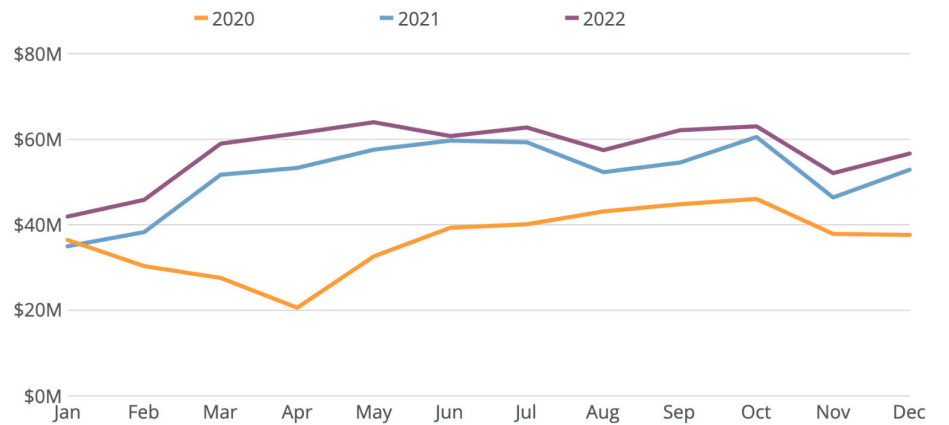
Retail



Amusement



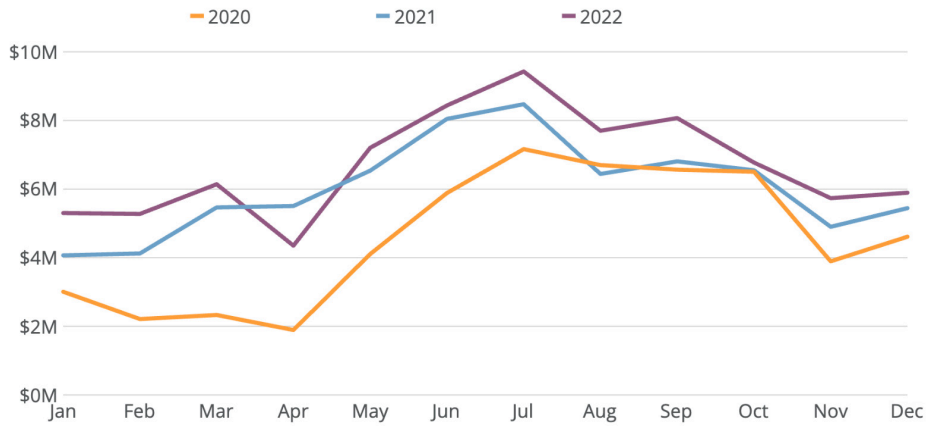
Restaurant/Bar



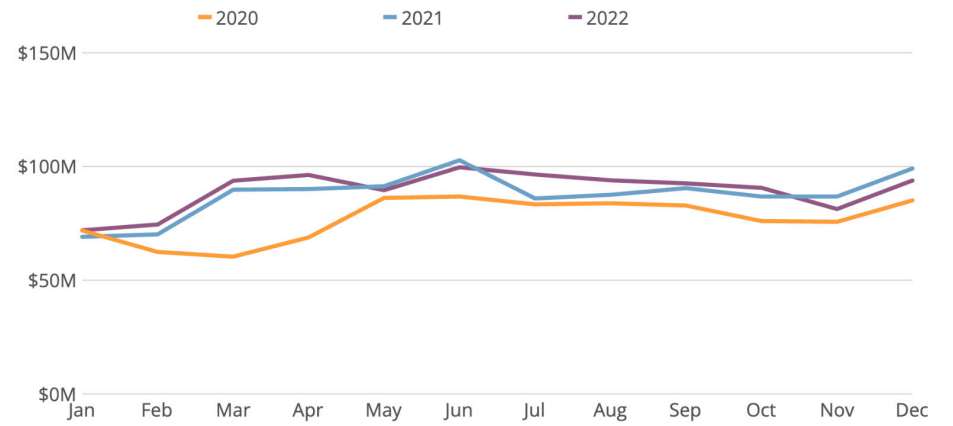
GROSS SALES

NAVAJO COUNTY

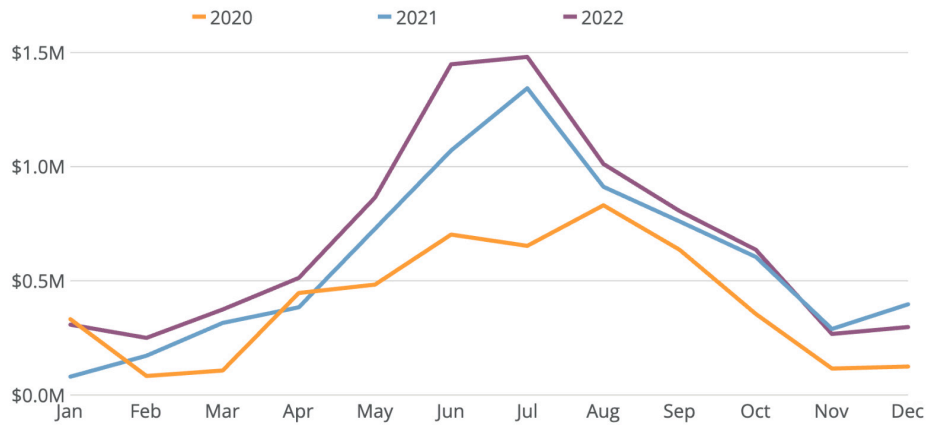
Lodging



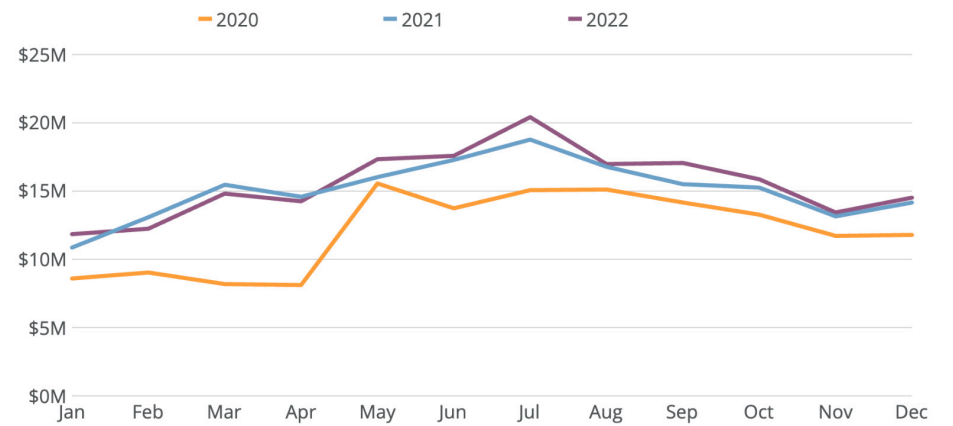
Retail



Amusement

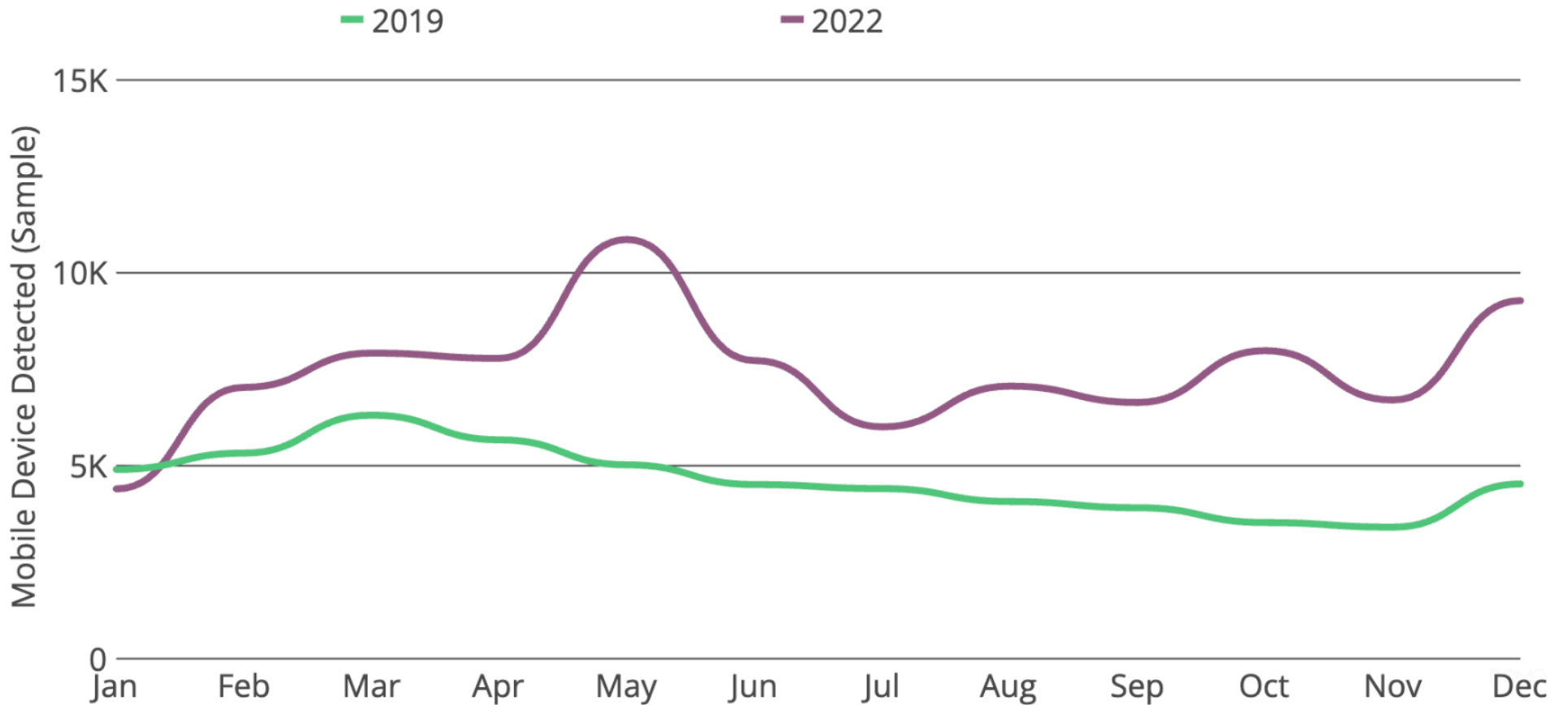


Restaurant/Bar



2022 VISITATION SUMMARY

TRIPS TO APACHE COUNTY BY MONTH



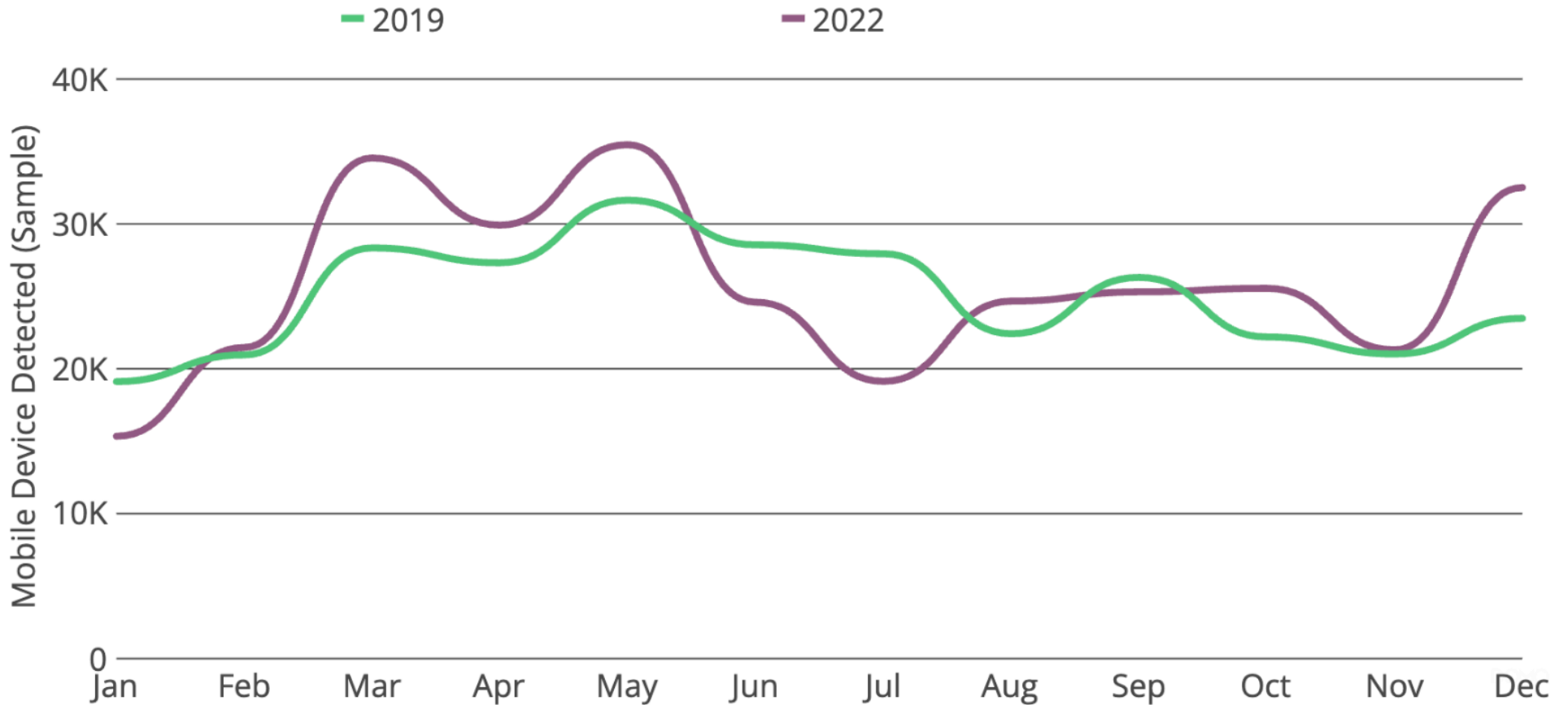
2022 VISITATION SUMMARY

TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | APACHE COUNTY

Origin DMA	% Total Visitation	Repeat Visitor Ratio	Average Time in Destination
Albuquerque-Santa Fe, NM	41%	88%	4.9
Phoenix, AZ	33%	86%	4.9
Salt Lake City, UT	2%	66%	6.1
Dallas-Ft. Worth, TX	1%	42%	7.8
Tucson (Sierra Vista), AZ	1%	57%	6.7
Denver, CO	1%	55%	7.0
Los Angeles, CA	1%	61%	7.7
Oklahoma City, OK	1%	55%	7.7
Amarillo, TX	1%	56%	7.4
Las Vegas, NV	1%	54%	7.6

2022 VISITATION SUMMARY

TRIPS TO COCONINO COUNTY BY MONTH



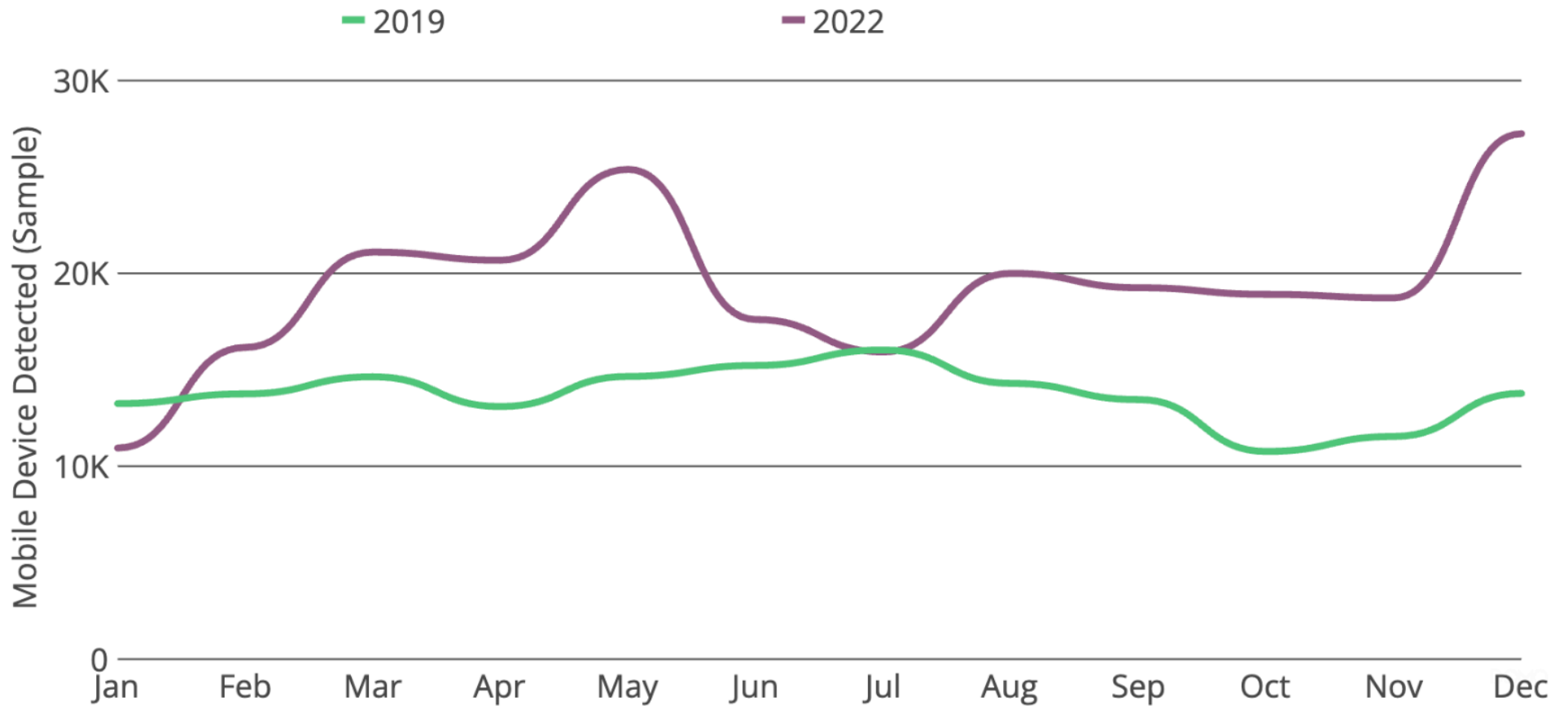
2022 VISITATION SUMMARY

TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | COCONINO COUNTY

Origin DMA	Visitor Share	Repeat Visitor Ratio	Average Time in Destination
Phoenix, AZ	61%	81%	4.6
Salt Lake City, UT	3%	65%	4.4
Albuquerque-Santa Fe, NM	3%	66%	5.2
Los Angeles, CA	3%	50%	5.8
Las Vegas, NV	1%	64%	4.0
Denver, CO	1%	55%	5.7
Tucson (Sierra Vista), AZ	1%	56%	5.7
Dallas-Ft. Worth, TX	1%	49%	5.5
Atlanta, GA	1%	53%	6.0
Chicago, IL	1%	59%	5.7

2022 VISITATION SUMMARY

TRIPS TO NAVAJO COUNTY BY MONTH



Source: Near

2022 VISITATION SUMMARY

TOP ORIGIN MARKETS FOR OVERNIGHT STAYS | NAVAJO COUNTY

Origin DMA	Visitor Share	Repeat Visitor Ratio	Average Time in Destination
Phoenix, AZ	72%	86%	4.9
Albuquerque-Santa Fe, NM	11%	87%	4.9
Dallas-Ft. Worth, TX	1%	44%	7.7
Tucson (Sierra Vista), AZ	1%	51%	5.8
Los Angeles, CA	1%	53%	7.1
Salt Lake City, UT	1%	67%	6.2
Las Vegas, NV	1%	52%	7.5
Denver, CO	1%	55%	7.6
Amarillo, TX	1%	48%	7.4

THANKS!

