

NORTHERN REGION

TRAVEL RESEARCH TRENDS



Arizona Travel Impact



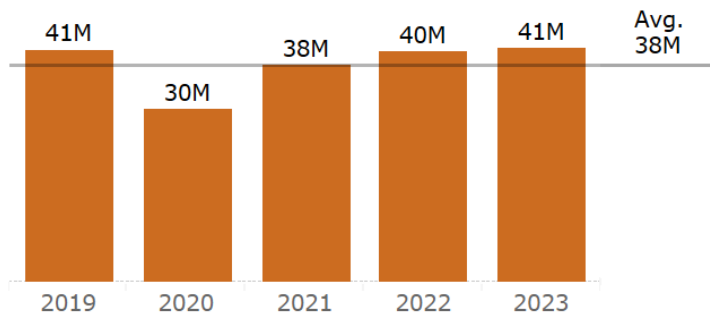
State Domestic Travel Impact



2023 Total Overnight Visitors

41M

+2% YOY | +1% vs. 2019



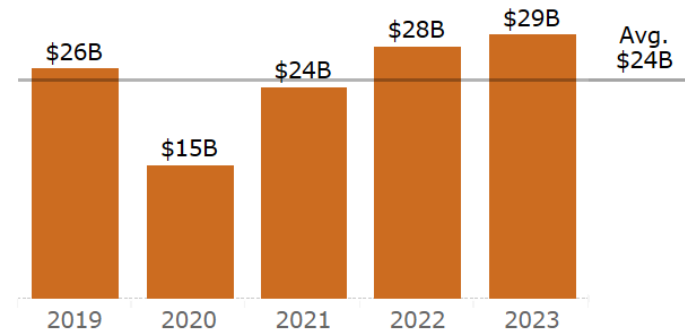
Source: Tourism Economics



2023 Total Spending

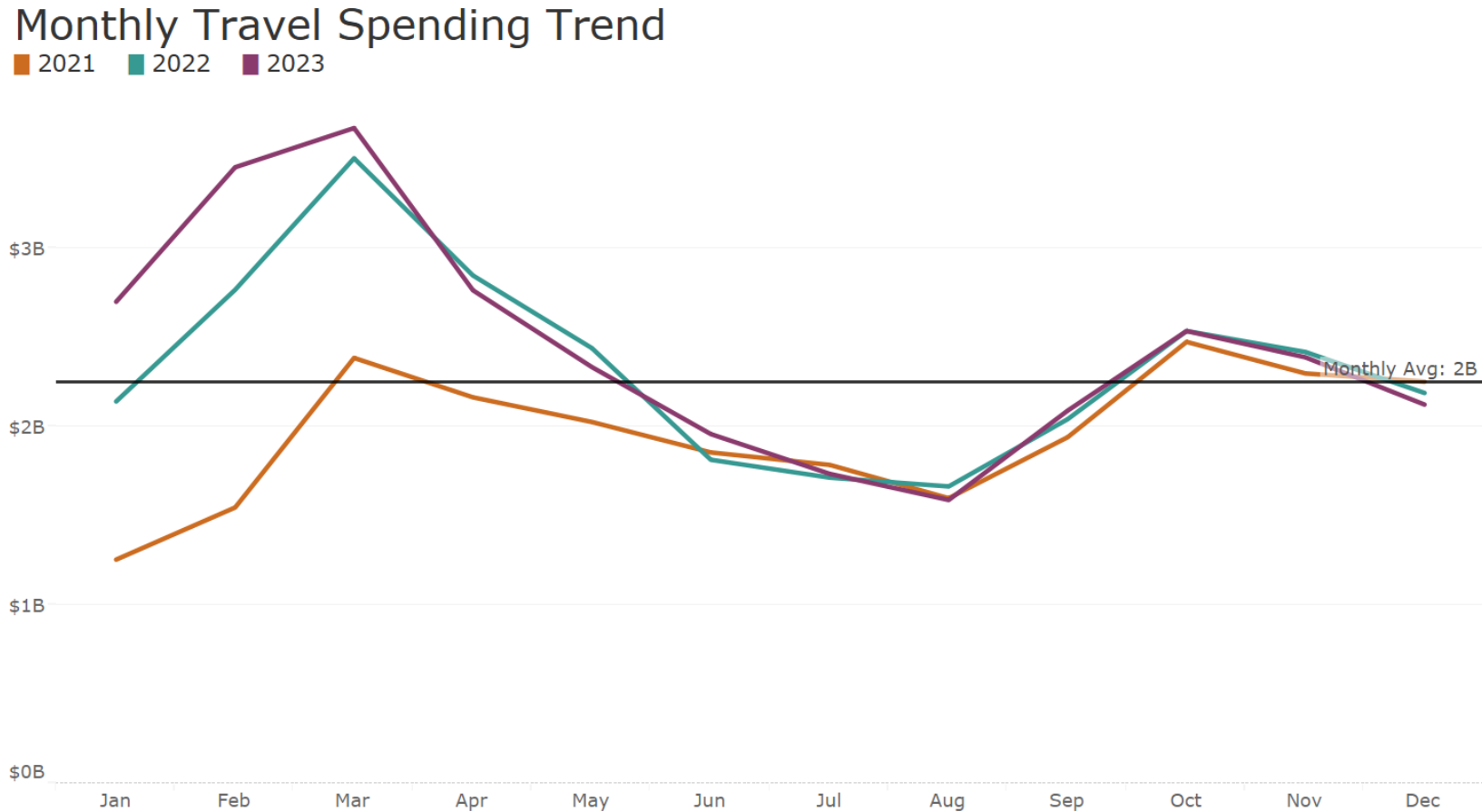
\$29B

+5% YOY | +15% vs. 2019



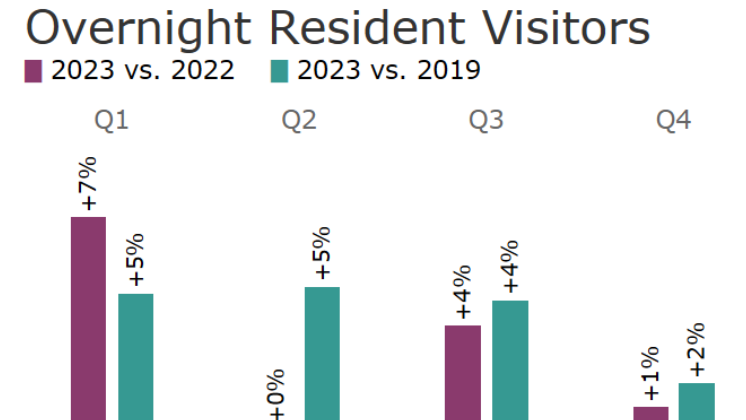
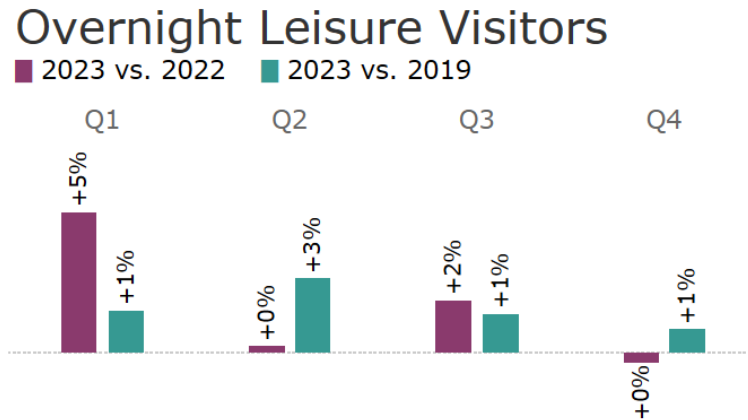
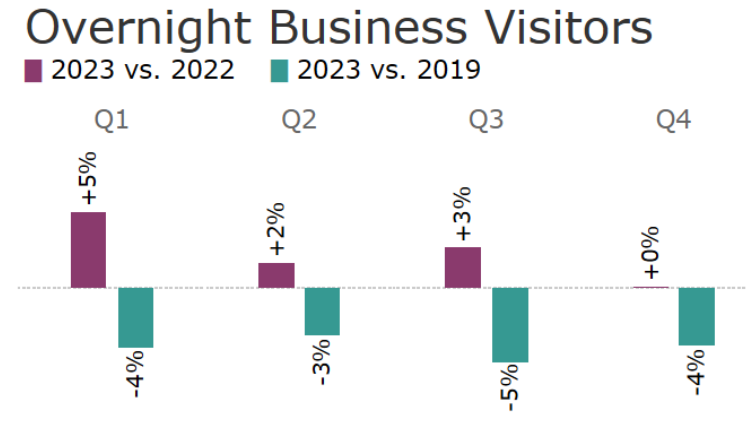
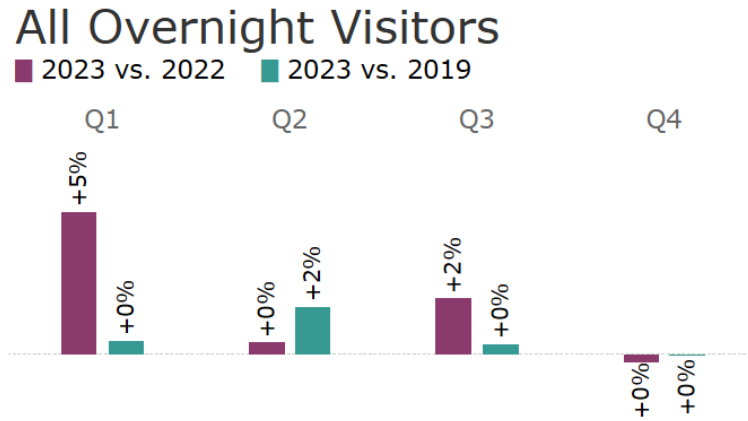
Source: Dean Runyan Associates

State Domestic Travel Impact



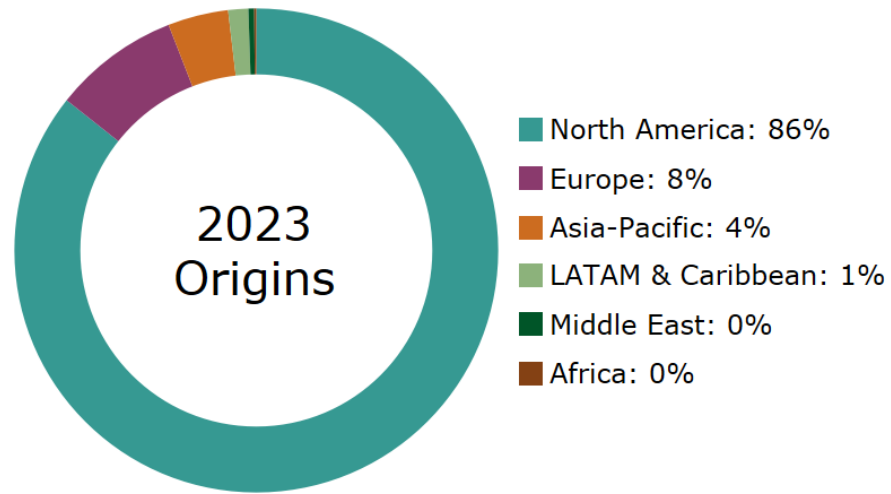
Source: Dean Runyan Associates

State Domestic Travel Impact

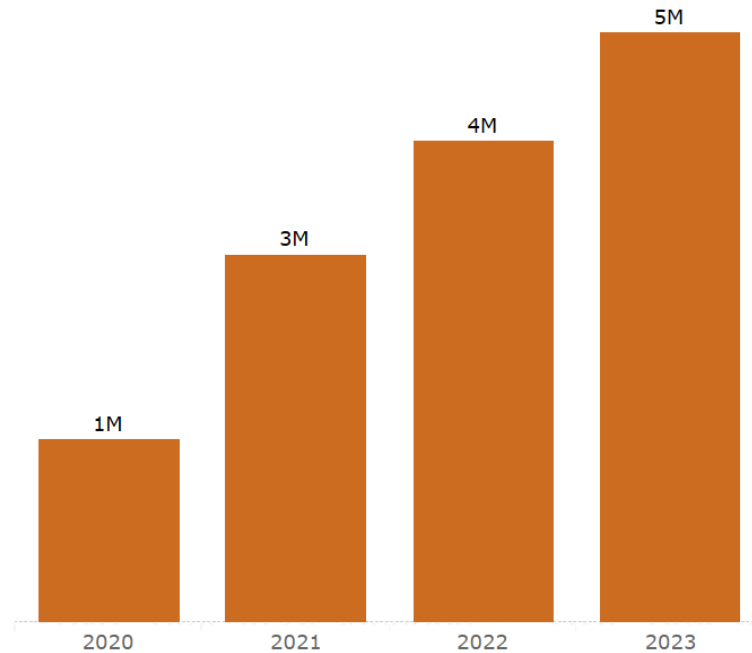


Source: Tourism Economics

State International Travel Impact



Annual International Overnight Visits
Last 4 years



Source: Tourism Economics International State Travel

Travel Impact by County

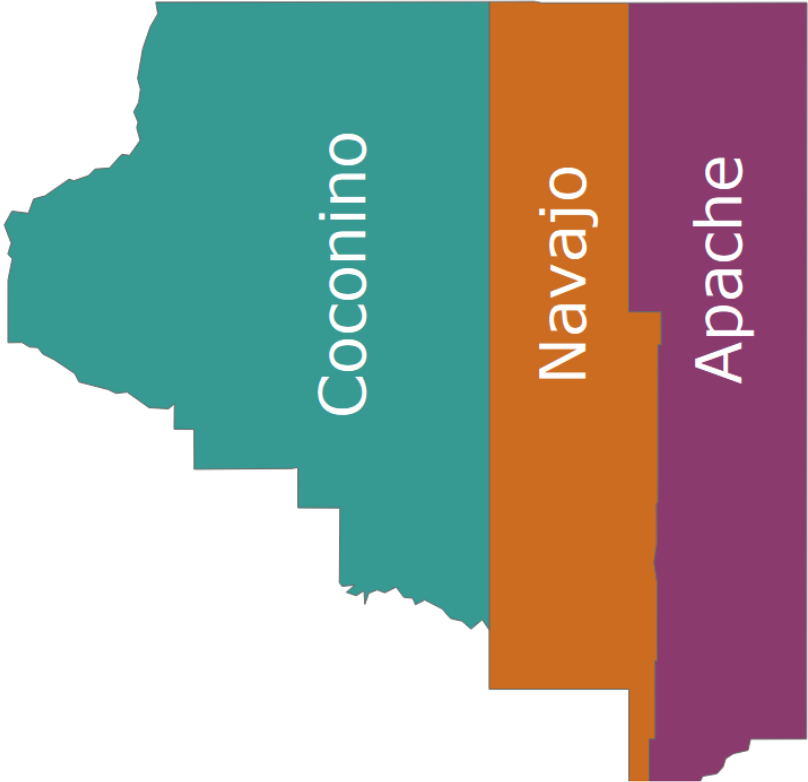


2023 Total Spending: Northern Region

Coconino
\$2B
+3% YOY

Navajo
\$430M
-3% YOY

Apache
\$144M
+2% YOY

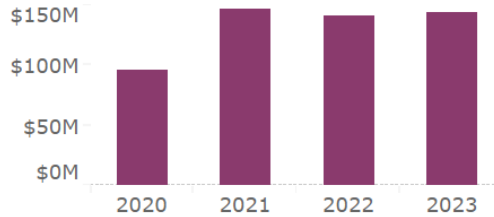


Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Apache County

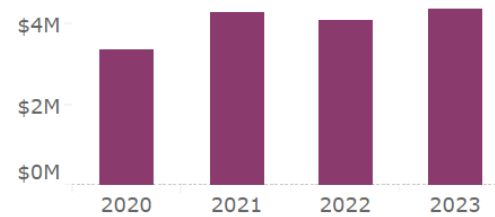
Direct Travel Spending

+\$2M
+2% YOY



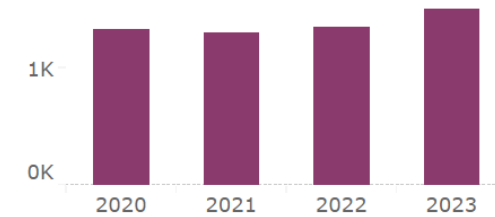
Local Tax Receipts

+\$286K
+7% YOY



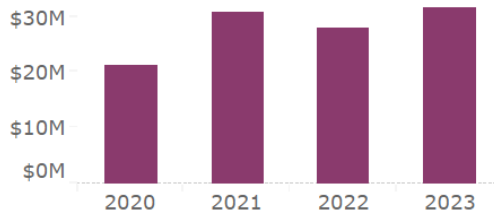
Employment

+150
+11% YOY



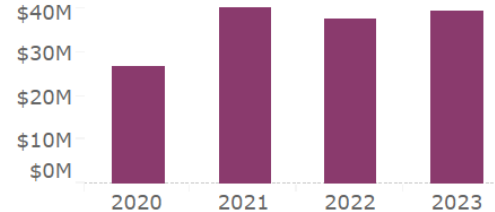
Accommodations Spending

+\$4M
+12% YOY



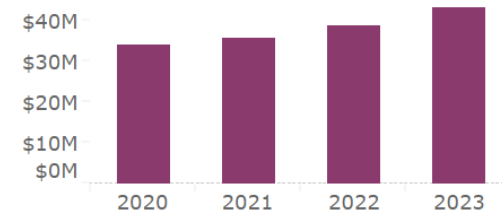
Food Service Spending

+\$2M
+5% YOY



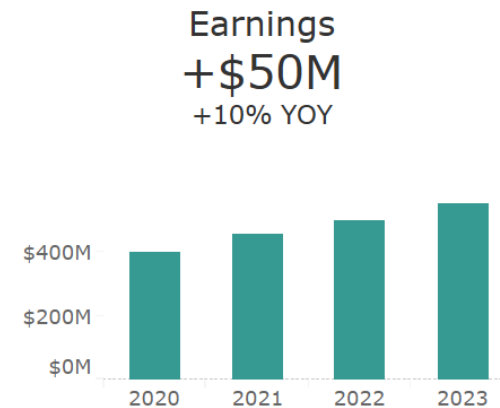
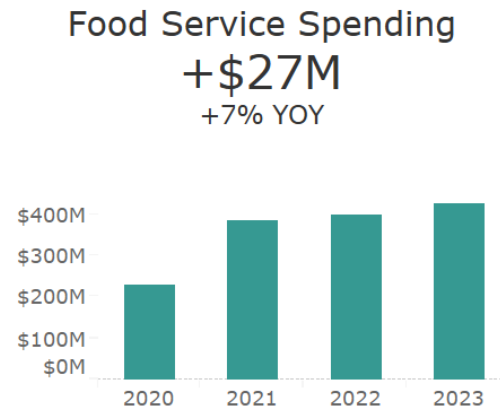
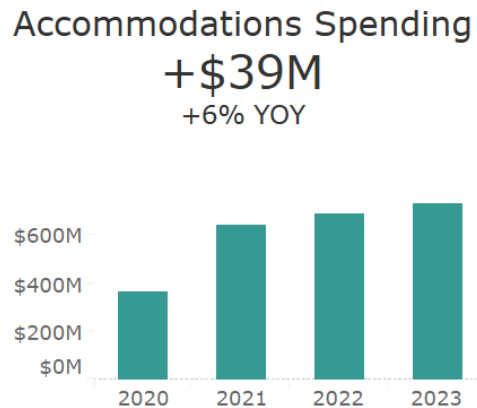
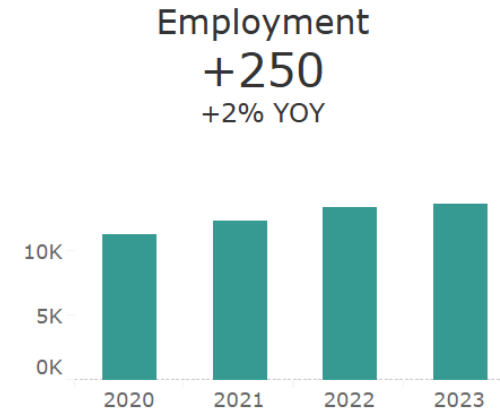
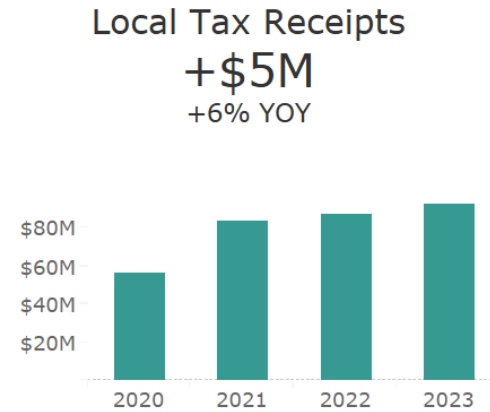
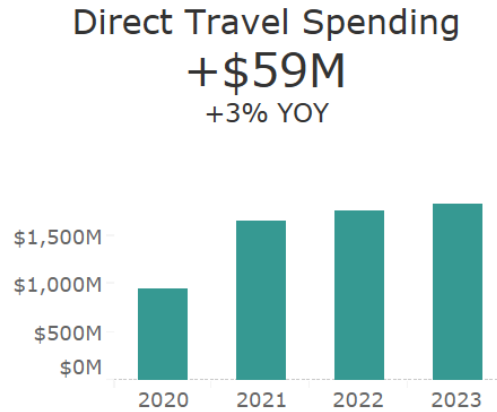
Earnings

+\$5M
+12% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Coconino County

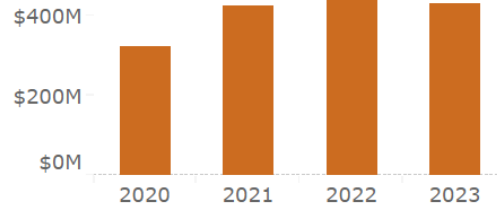


Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Navajo County

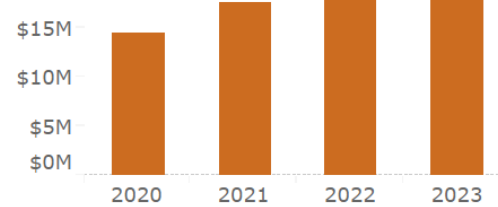
Direct Travel Spending

-\$12M
-3% YOY



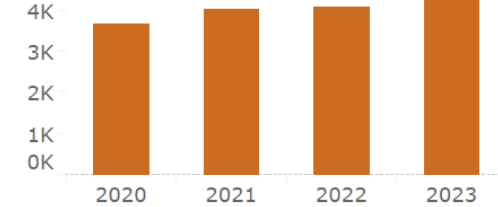
Local Tax Receipts

+\$38K
+0% YOY



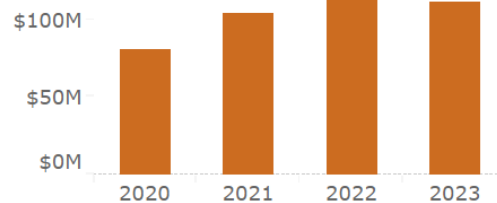
Employment

+180
+4% YOY



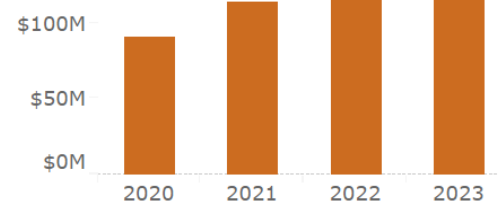
Accommodations Spending

-\$2M
-2% YOY



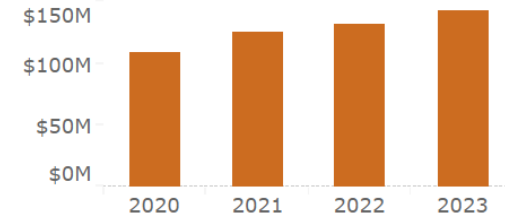
Food Service Spending

+\$1M
+1% YOY



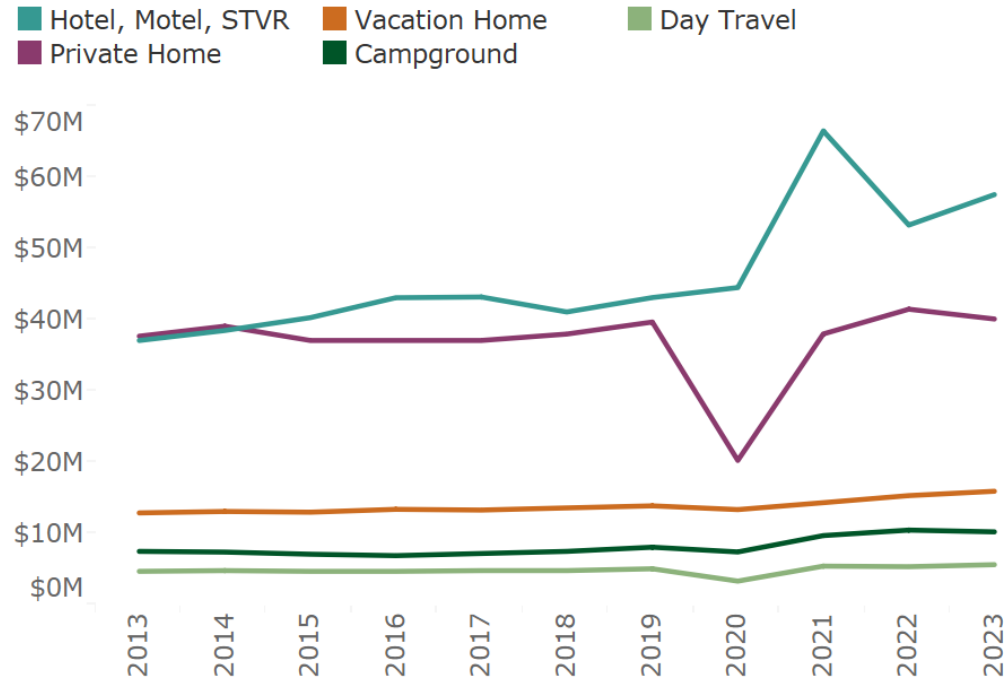
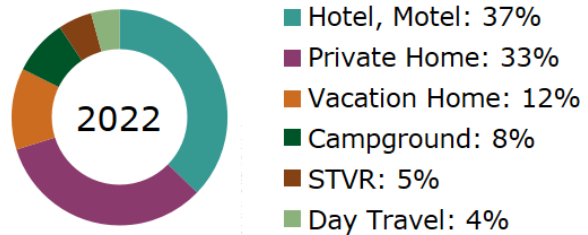
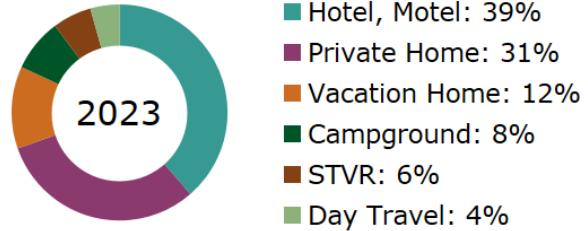
Earnings

+\$10M
+8% YOY



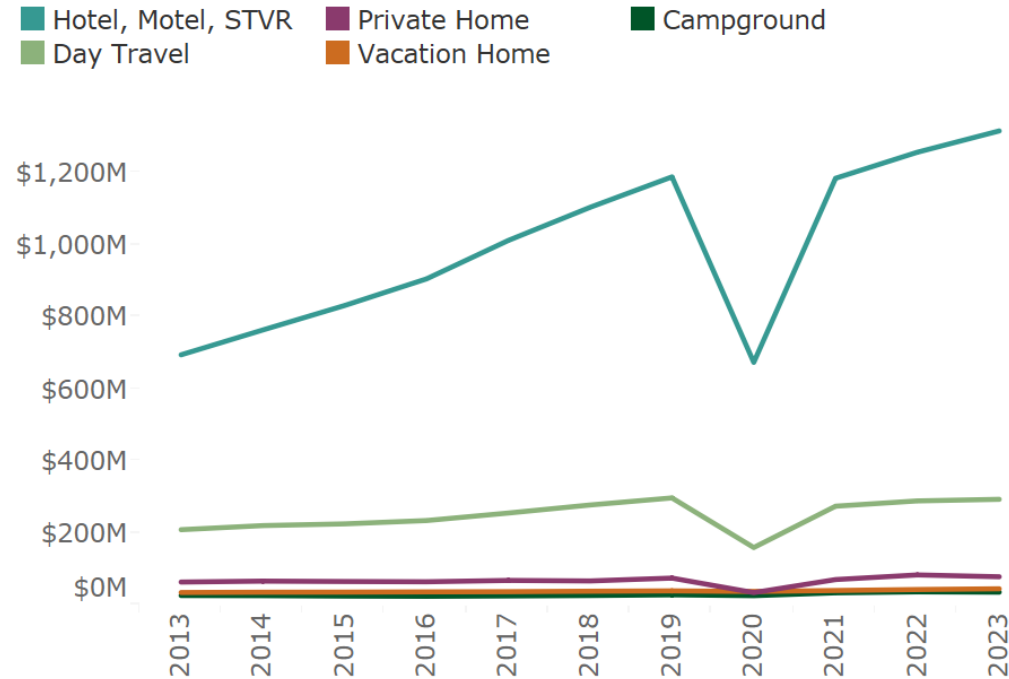
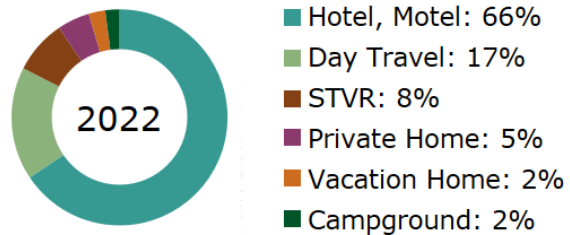
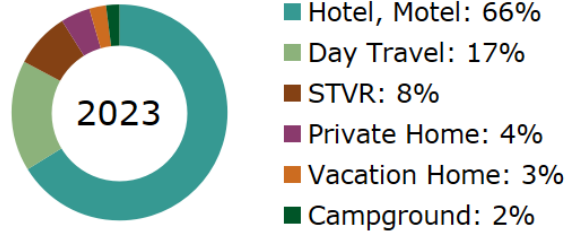
Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Accommodation Type: Apache County



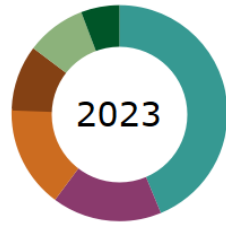
Source: Arizona Travel Impacts, Dean Runyan Associates
 * STVR stands for Short-Term Vacation Rental

Spend by Accommodation Type: Coconino County

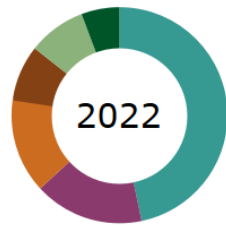


Source: Arizona Travel Impacts, Dean Runyan Associates
 * STVR stands for Short-Term Vacation Rental

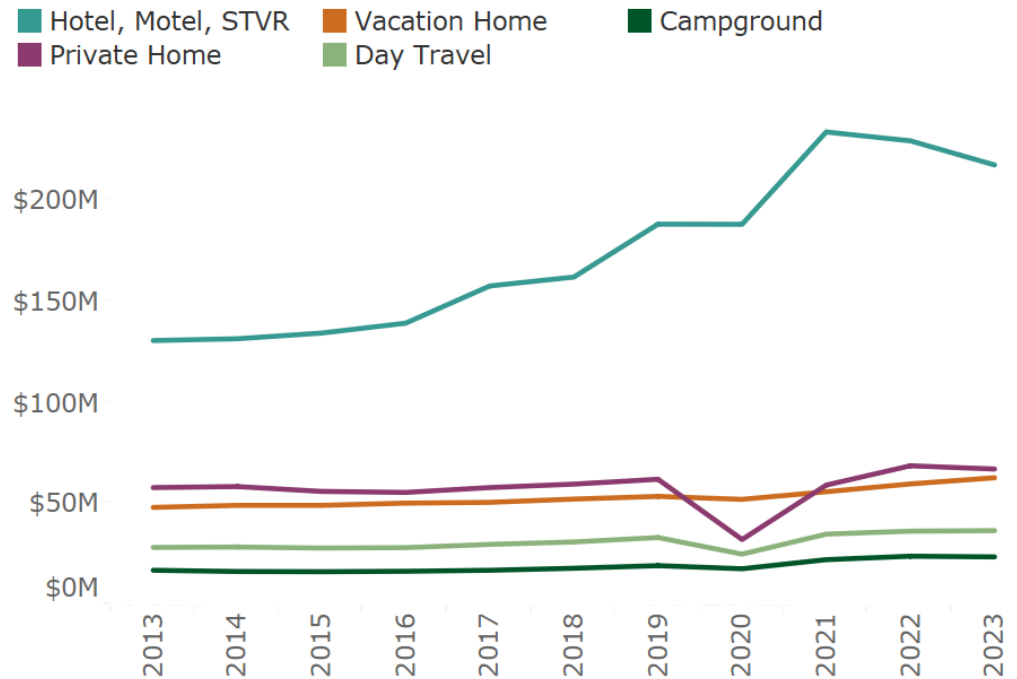
Spend by Accommodation Type: Navajo County



- Hotel, Motel: 44%
- Private Home: 16%
- Vacation Home: 15%
- STVR: 10%
- Day Travel: 9%
- Campground: 6%

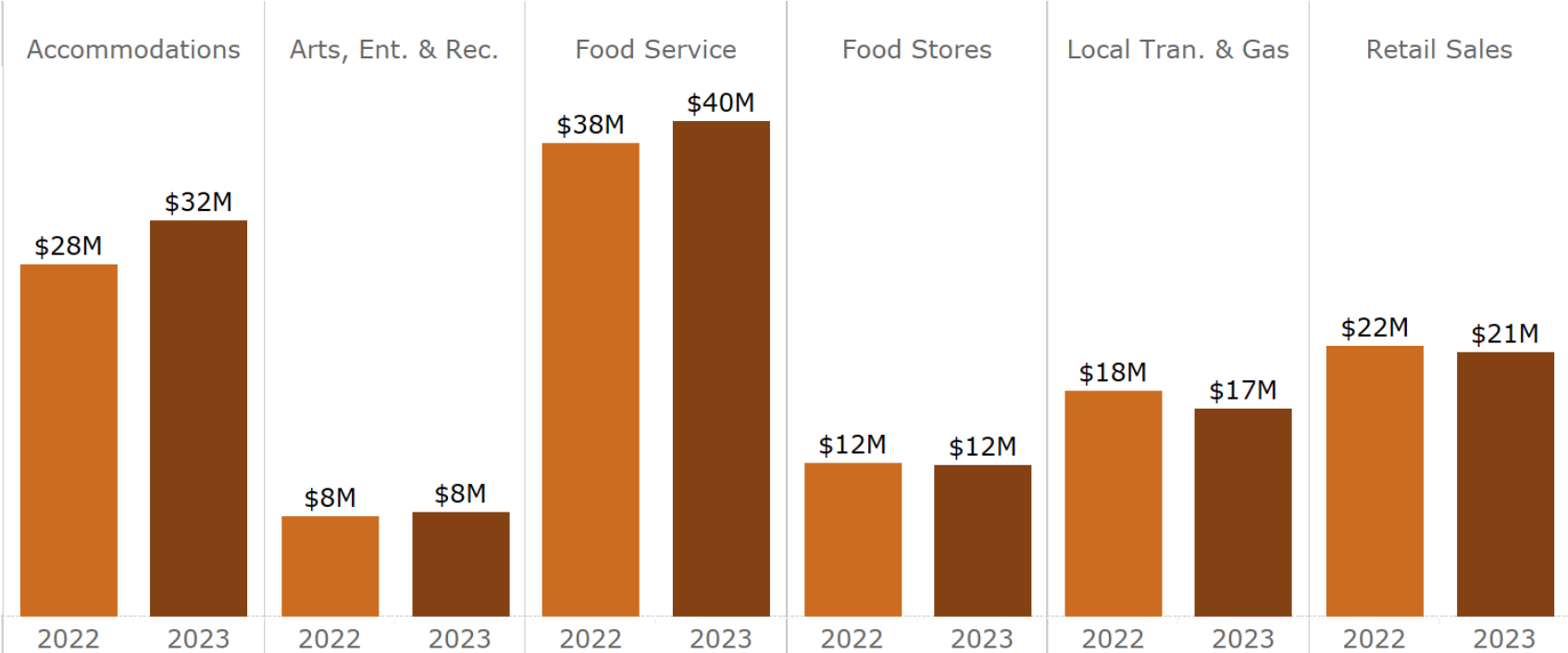


- Hotel, Motel: 47%
- Private Home: 16%
- Vacation Home: 14%
- Day Travel: 9%
- STVR: 8%
- Campground: 6%



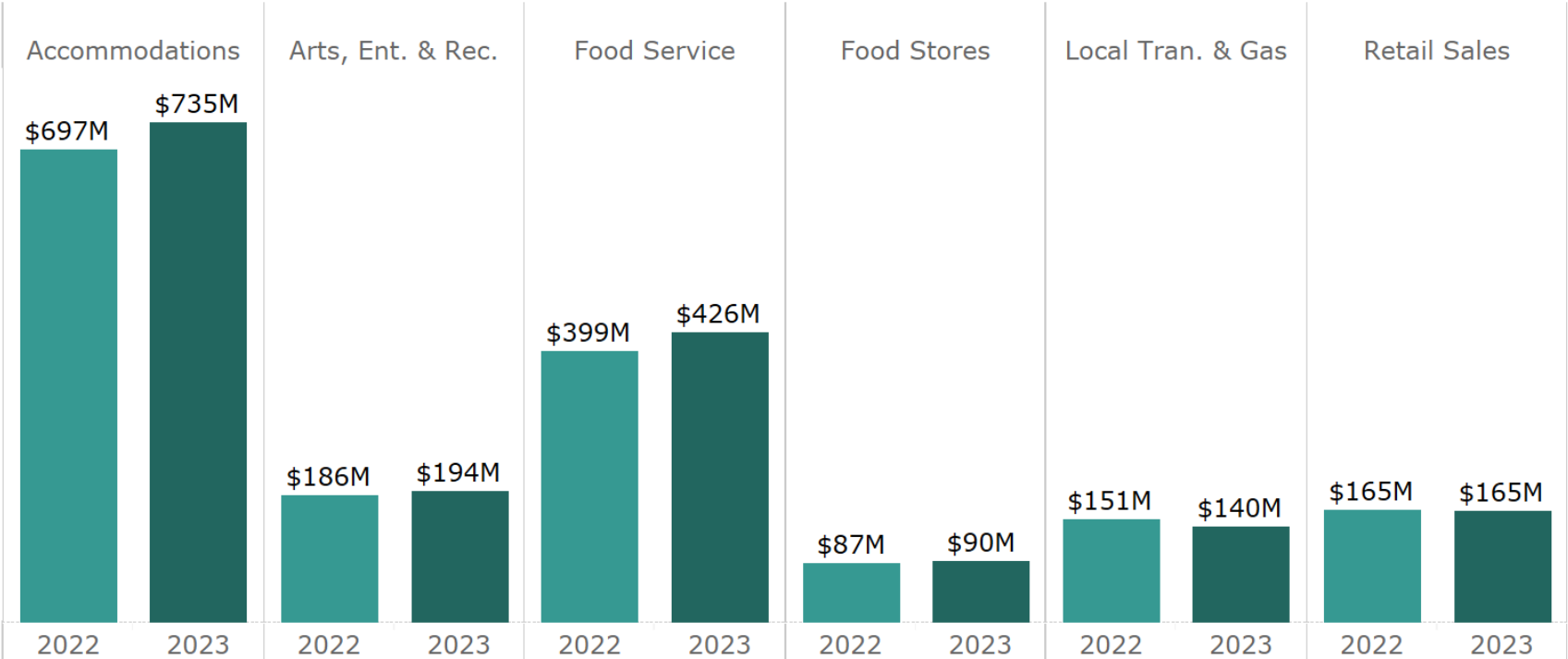
Source: Arizona Travel Impacts, Dean Runyan Associates
 * STVR stands for Short-Term Vacation Rental

Spend by Commodity: Apache County



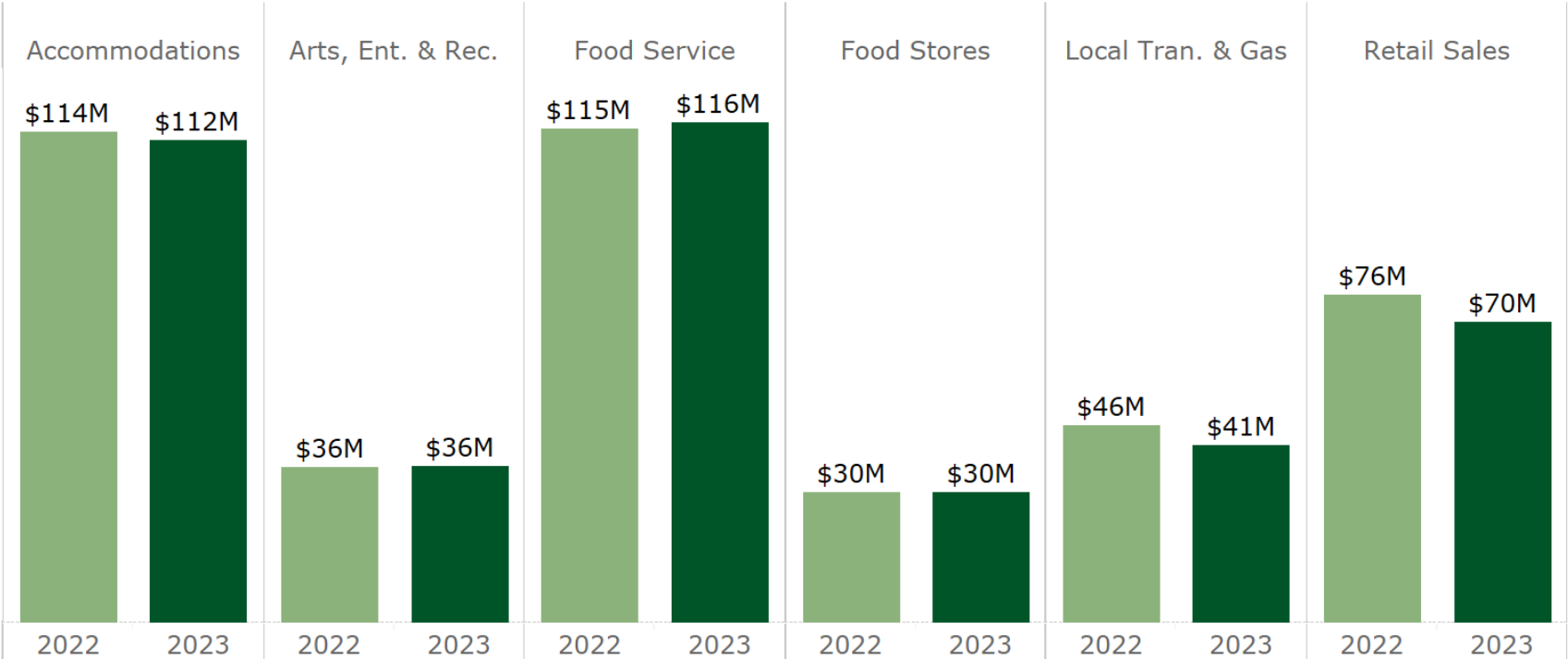
Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Coconino County



Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Navajo County



Source: Arizona Travel Impacts, Dean Runyan Associates

Lodging Performance

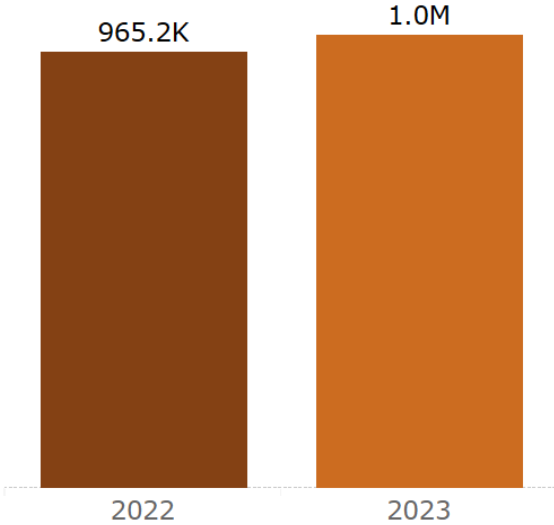


Short-Term Rentals: Northern Region

Year-to-Date Supply
Jan - Dec All Properties Available



Year-to-Date Demand
Jan - Dec Nights Sold at All Properties



Source: AirDNA

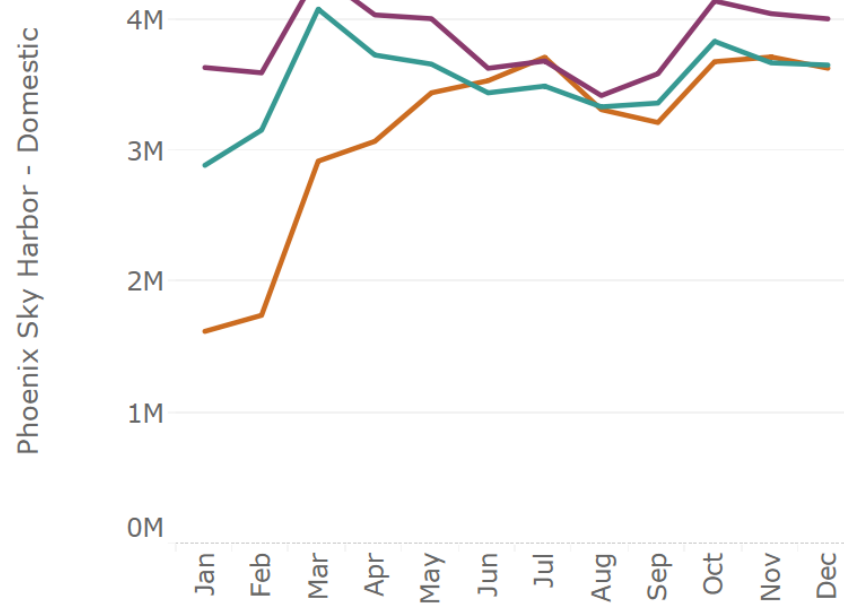
Airport Passenger Traffic



Airport Passengers: Northern Region

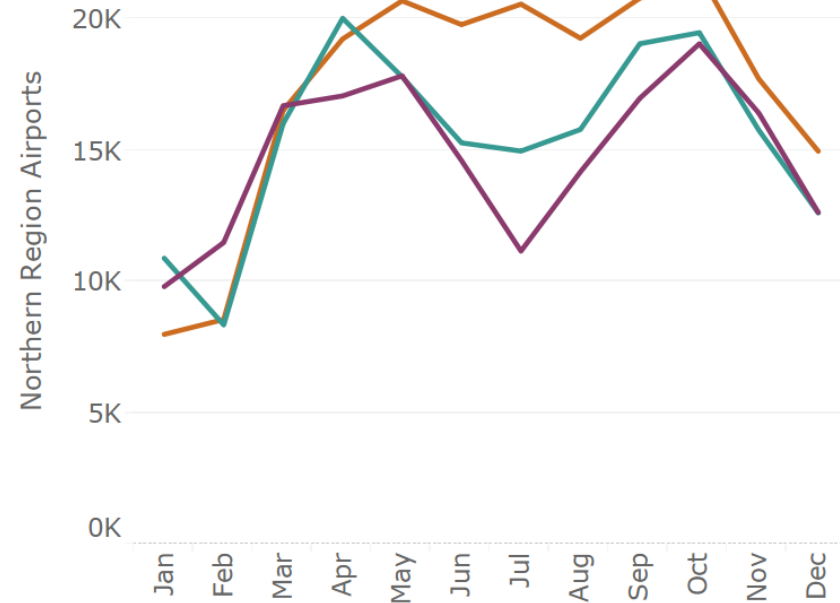
Airport Hub

2021 2022 2023



Region Airports

2021 2022 2023



Flagstaff Pulliam, Page Municipal, & Show Low Regional

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

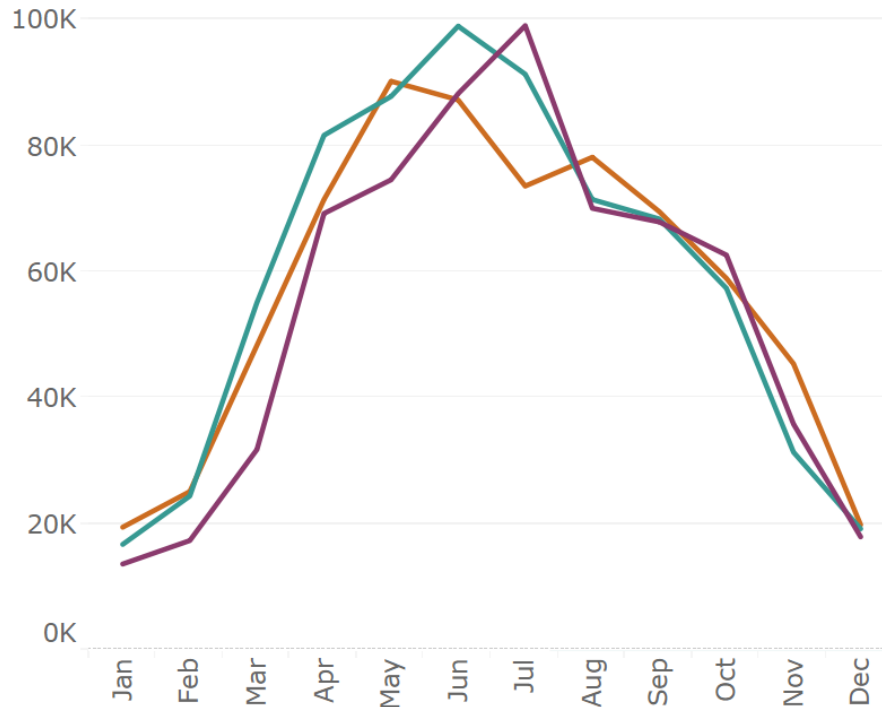
National & State Parks



State Parks: Northern Region

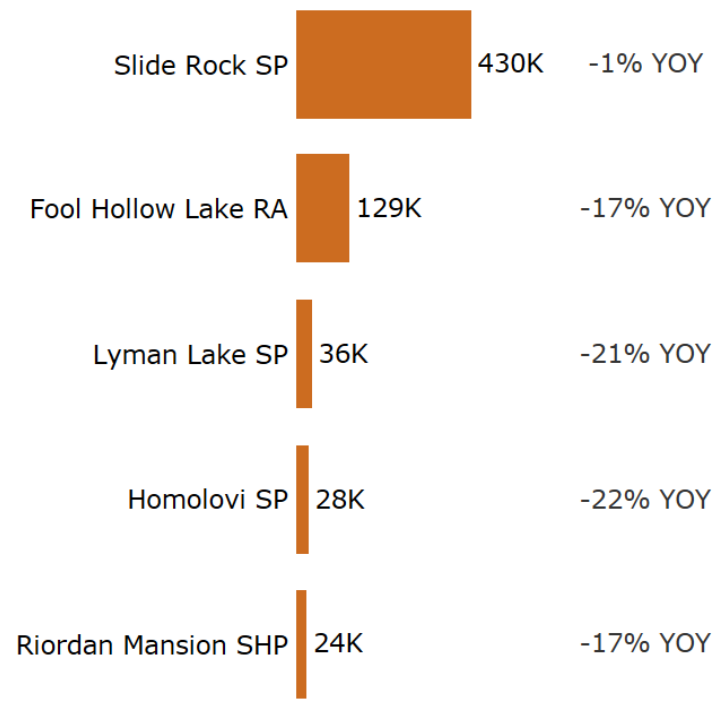
State Parks Visitation Monthly Trend

2021 2022 2023



Year-to-Date Park Visitation

Jan - Dec 2023 Visits & YOY % Change

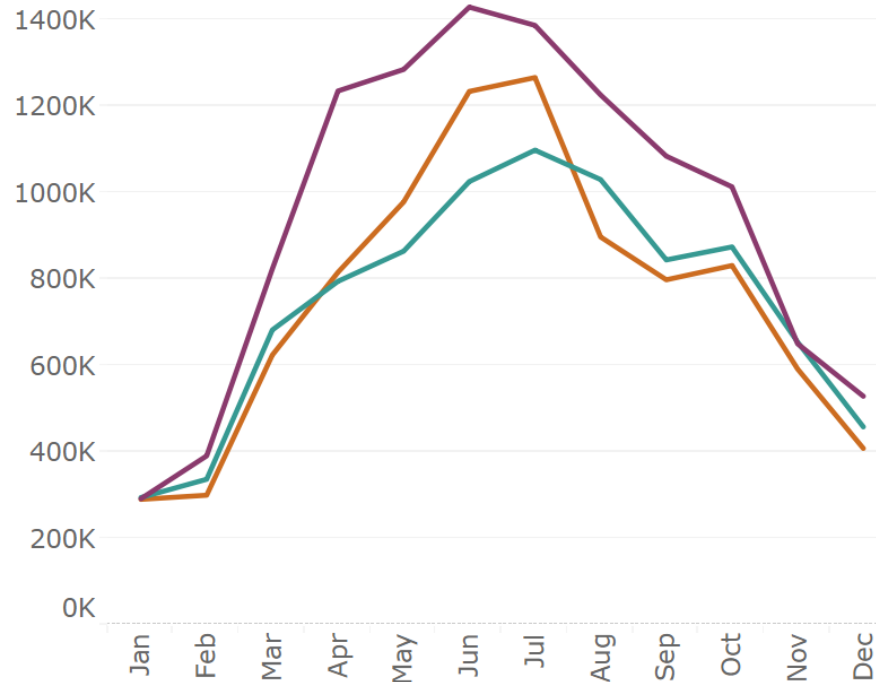


Source: Northern Arizona University, Arizona State Parks

National Parks: Northern Region

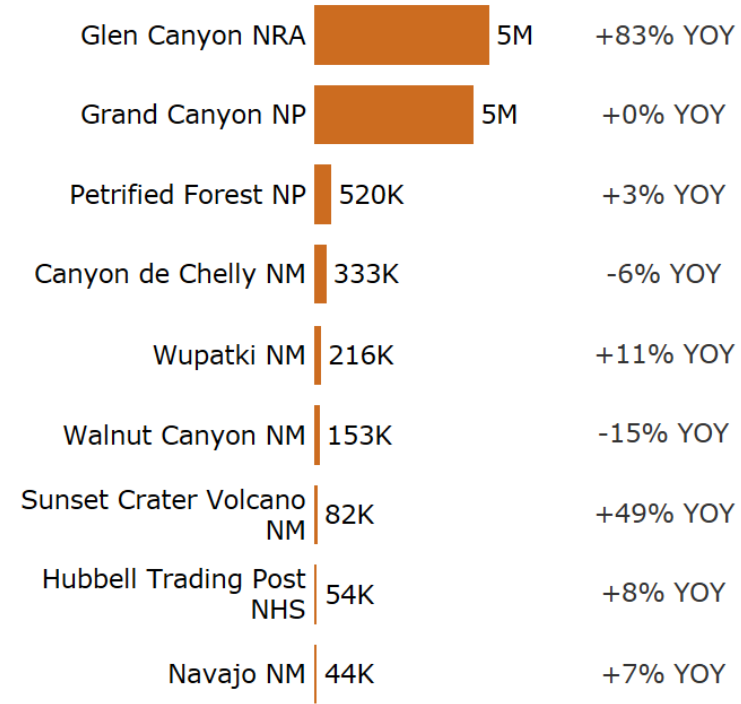
National Parks Visitation Monthly Trend

2021 2022 2023



Year-to-Date Park Visitation

Jan - Dec 2023 Visits & YOY % Change



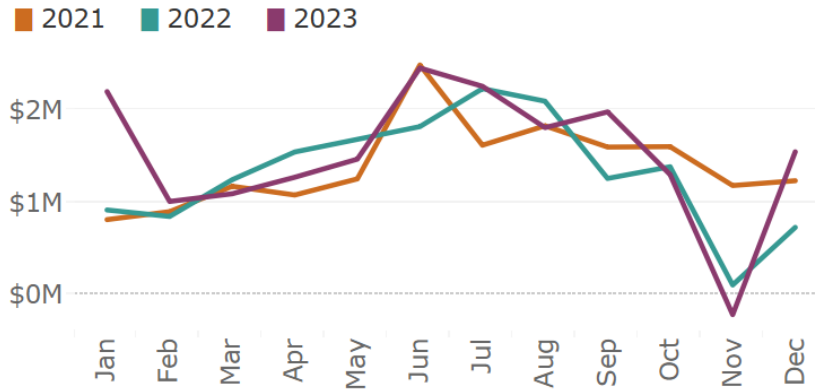
Source: Northern Arizona University, National Park Service

Gross Sales

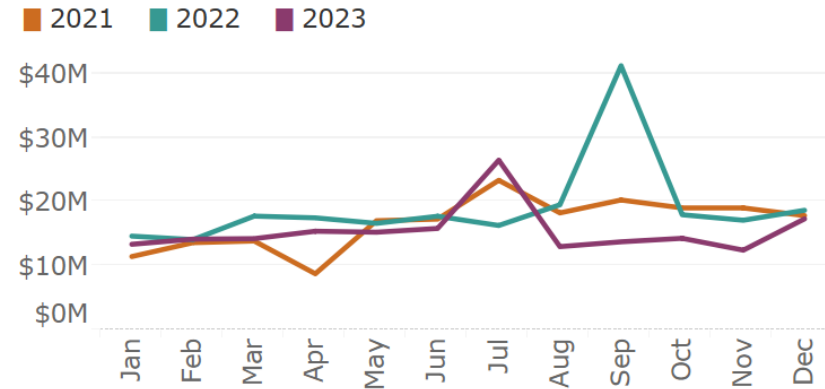


Gross Sales: Apache County

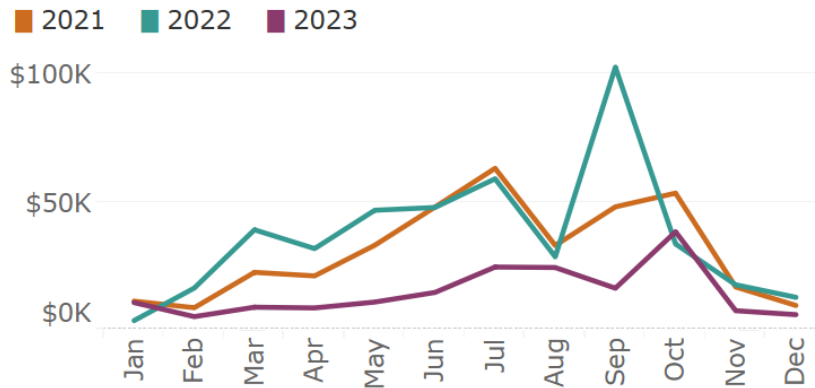
Hotel/Motel



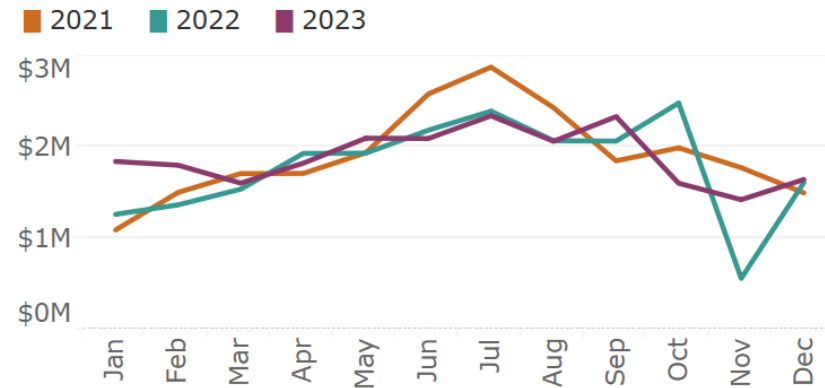
Retail



Amusement



Restaurant

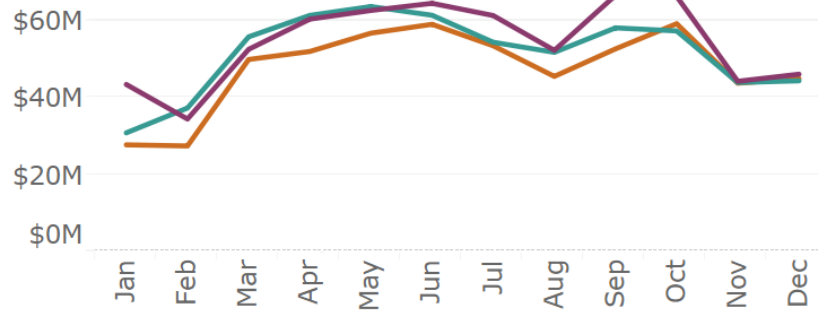


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Coconino County

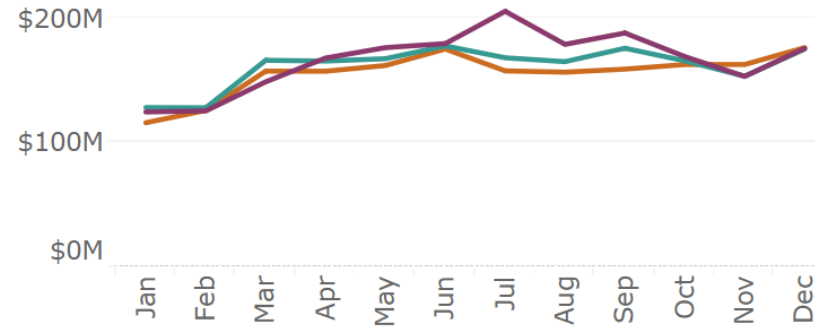
Hotel/Motel

2021 2022 2023



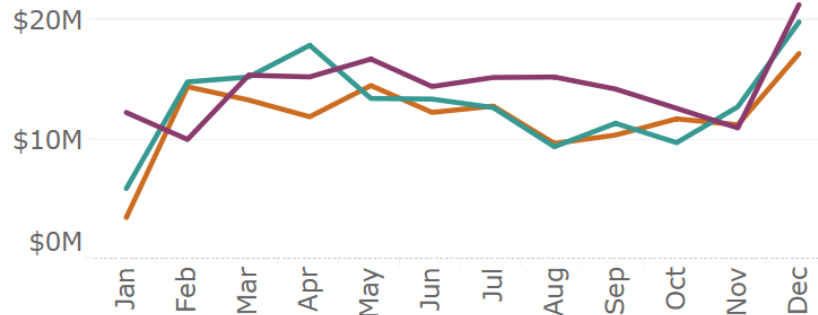
Retail

2021 2022 2023



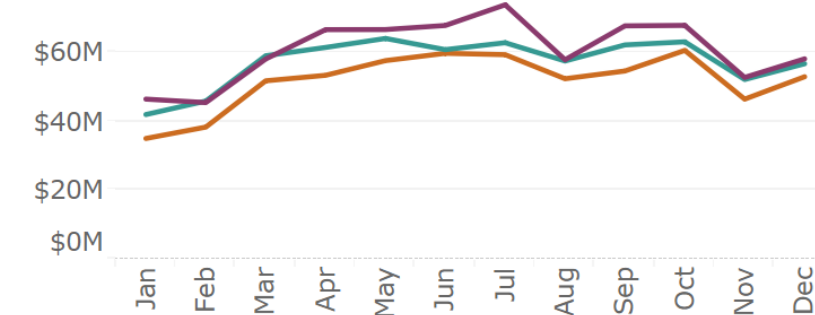
Amusement

2021 2022 2023



Restaurant

2021 2022 2023

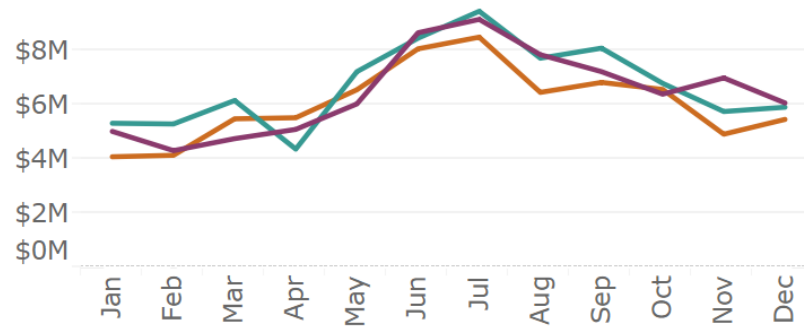


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Navajo County

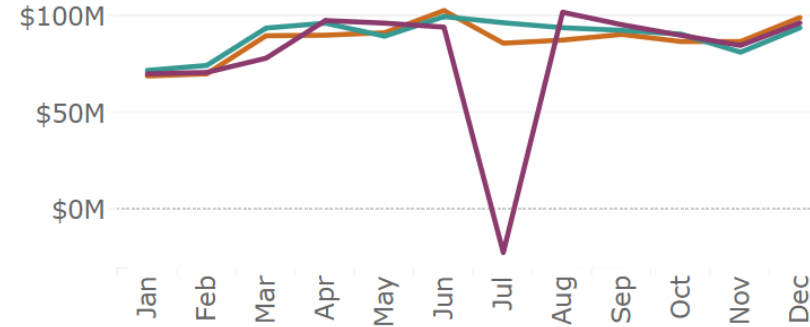
Hotel/Motel

2021 2022 2023



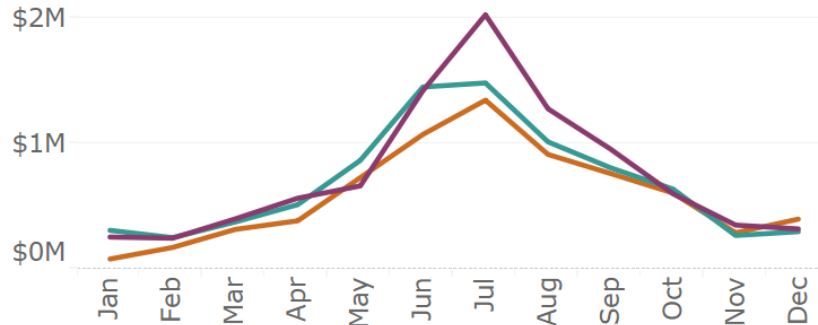
Retail

2021 2022 2023



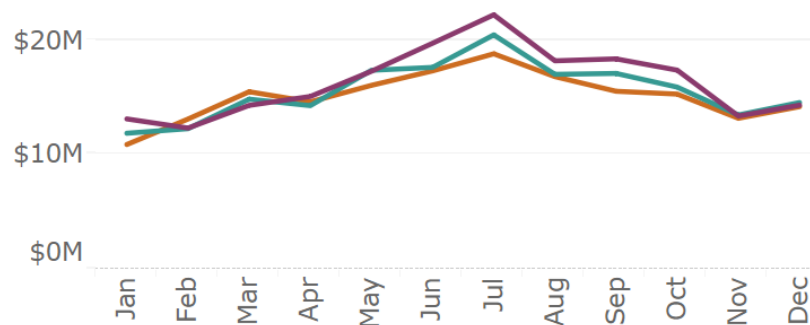
Amusement

2021 2022 2023



Restaurant

2021 2022 2023

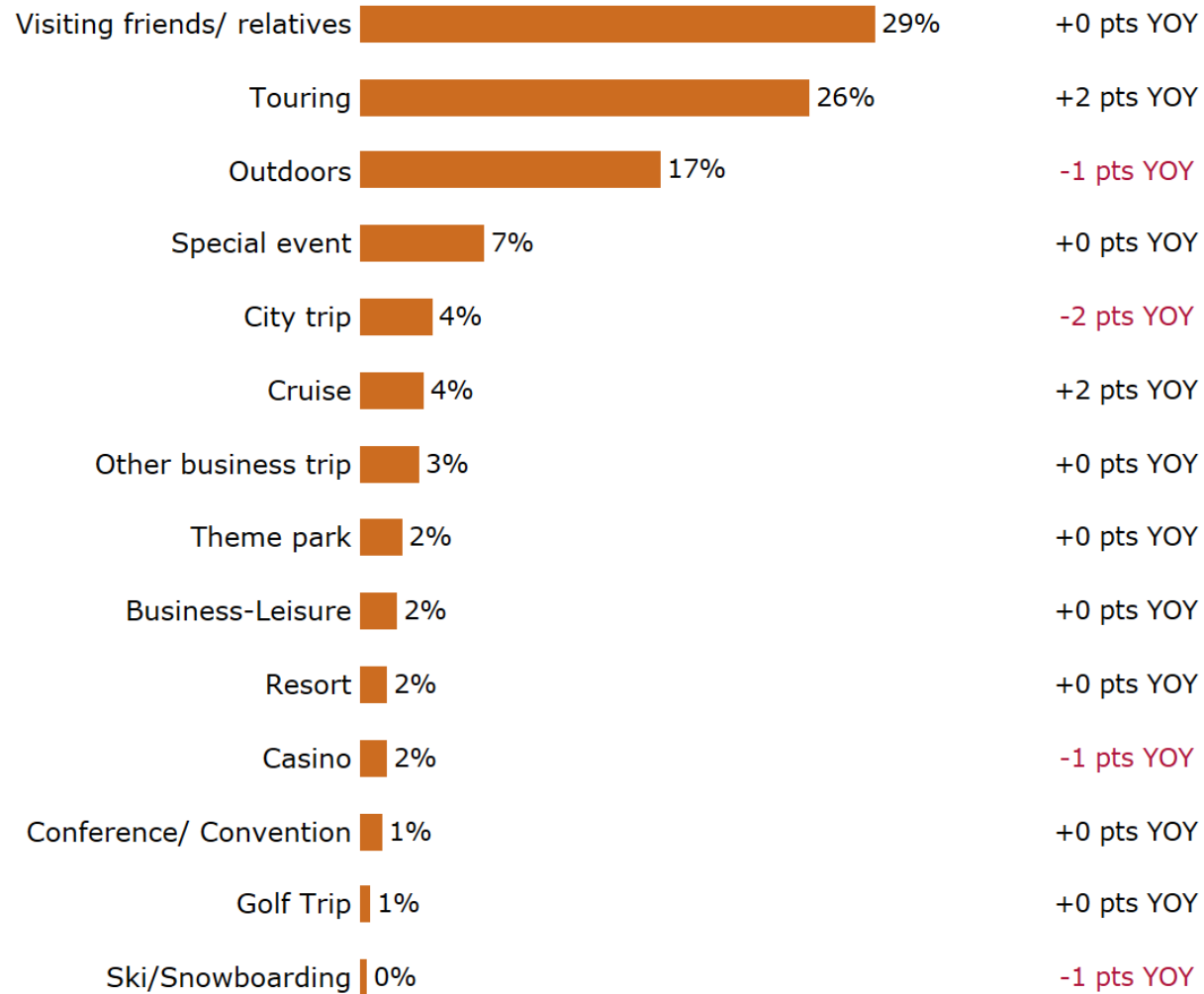


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Visitor Summary

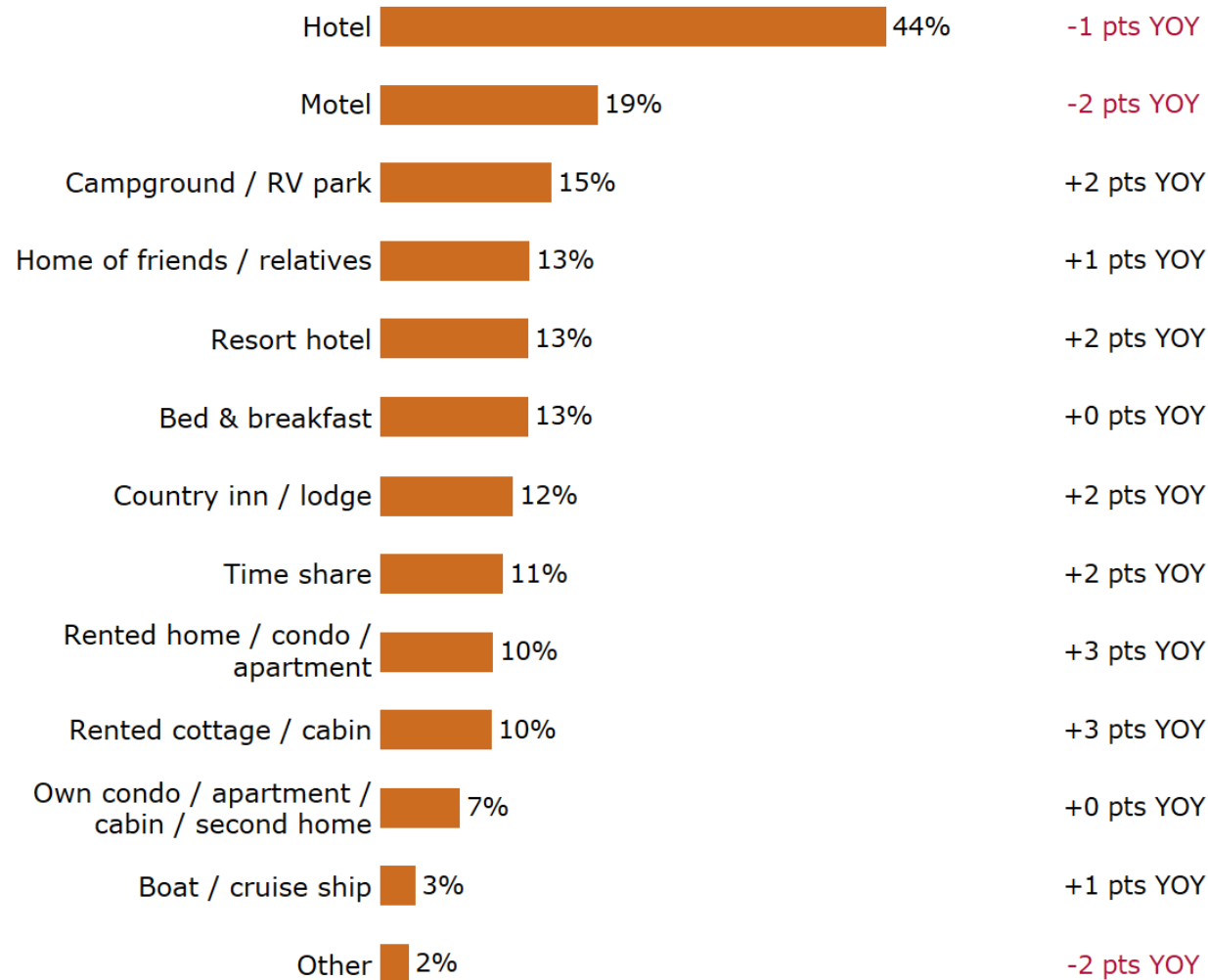


2023 Main Purpose of Trip: Northern Region




Source: Longwoods

2023 Accommodation: Northern Region



Source: Longwoods

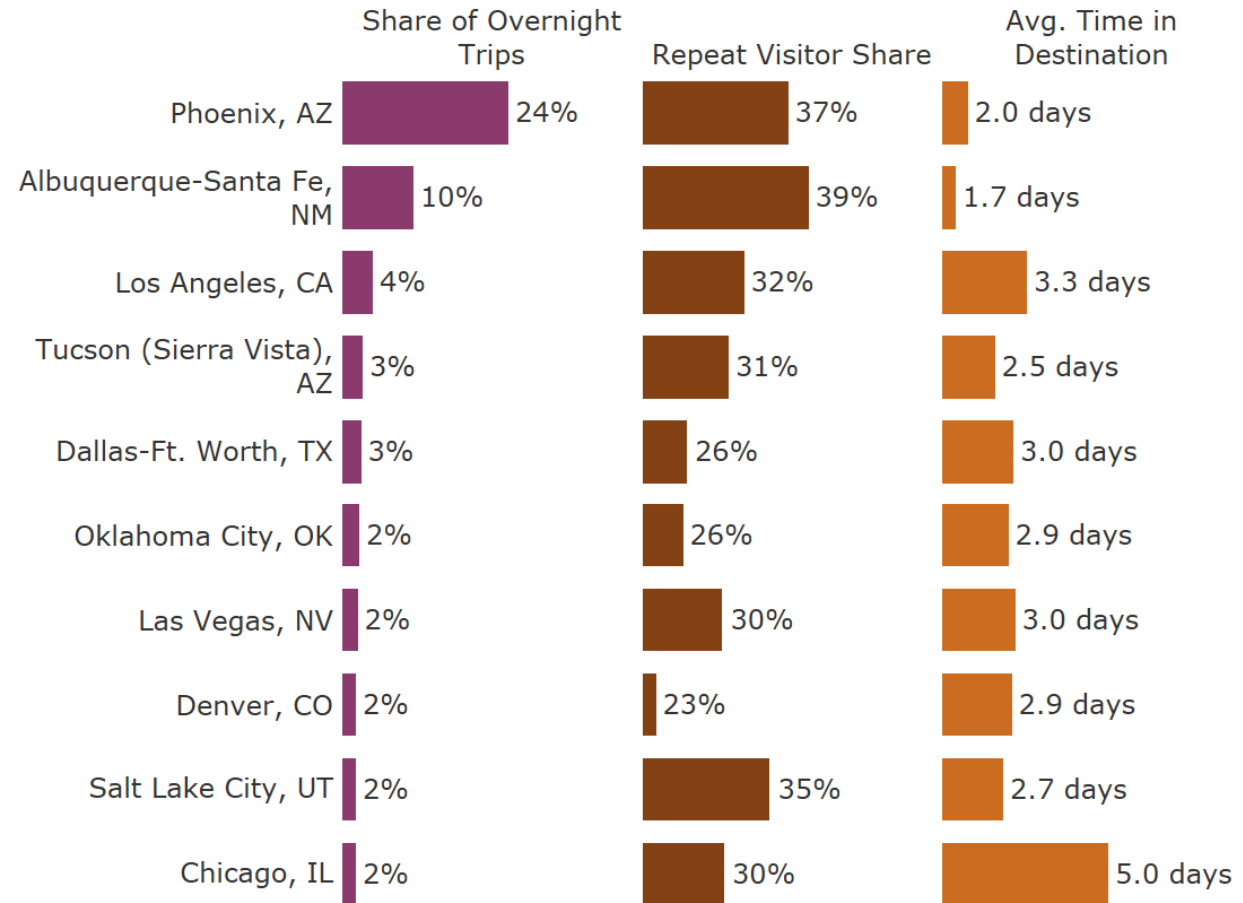
2023 Visitor Summary: Apache County


84%
 Overnight Visitor Share


50%
 Repeat Visitor Share


3.0 days
 Avg. Time in Destination

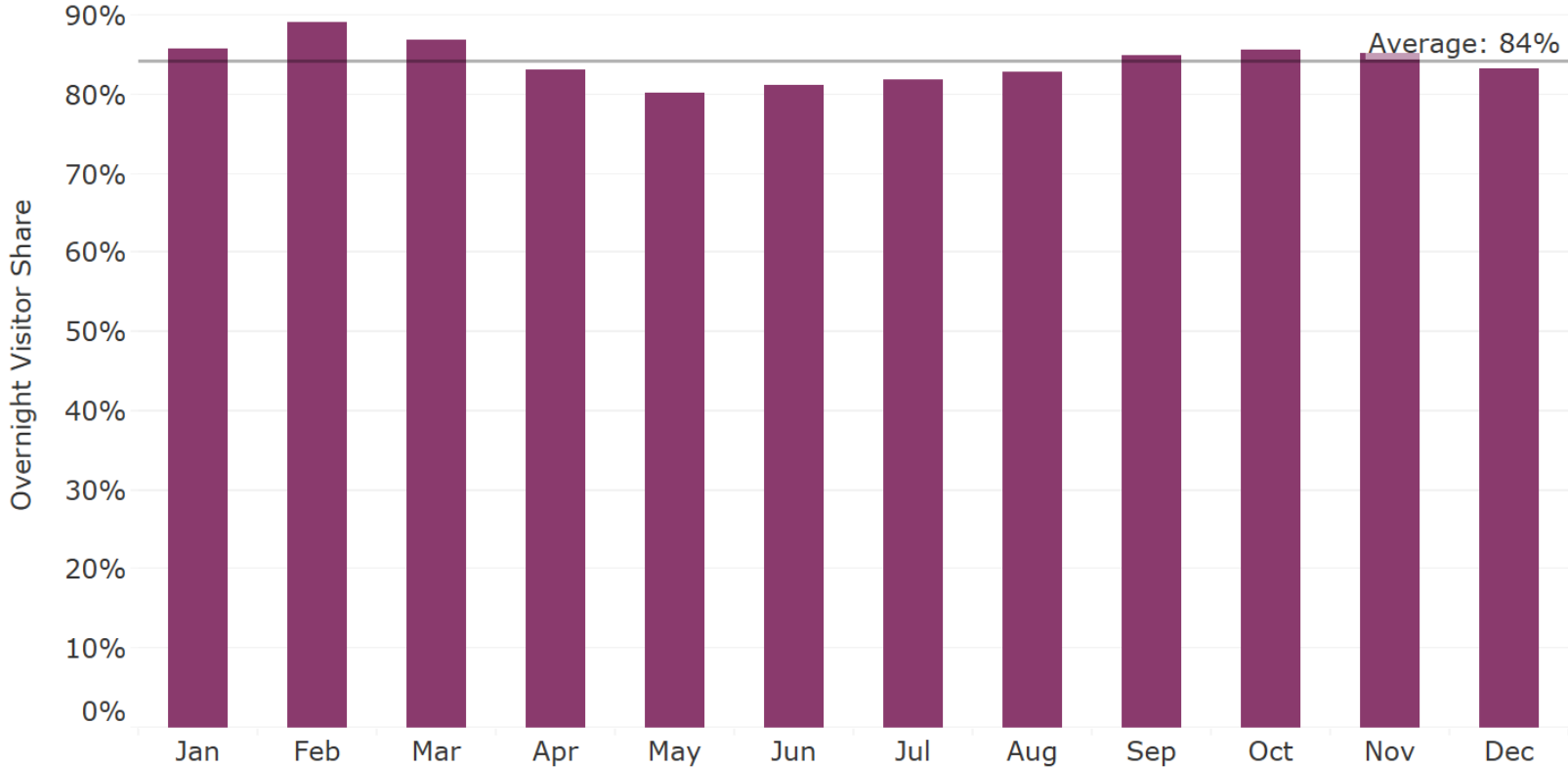
Top 10 Overnight Visitor Origins



Source: Azira


Overnight Visitor Share: Apache County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

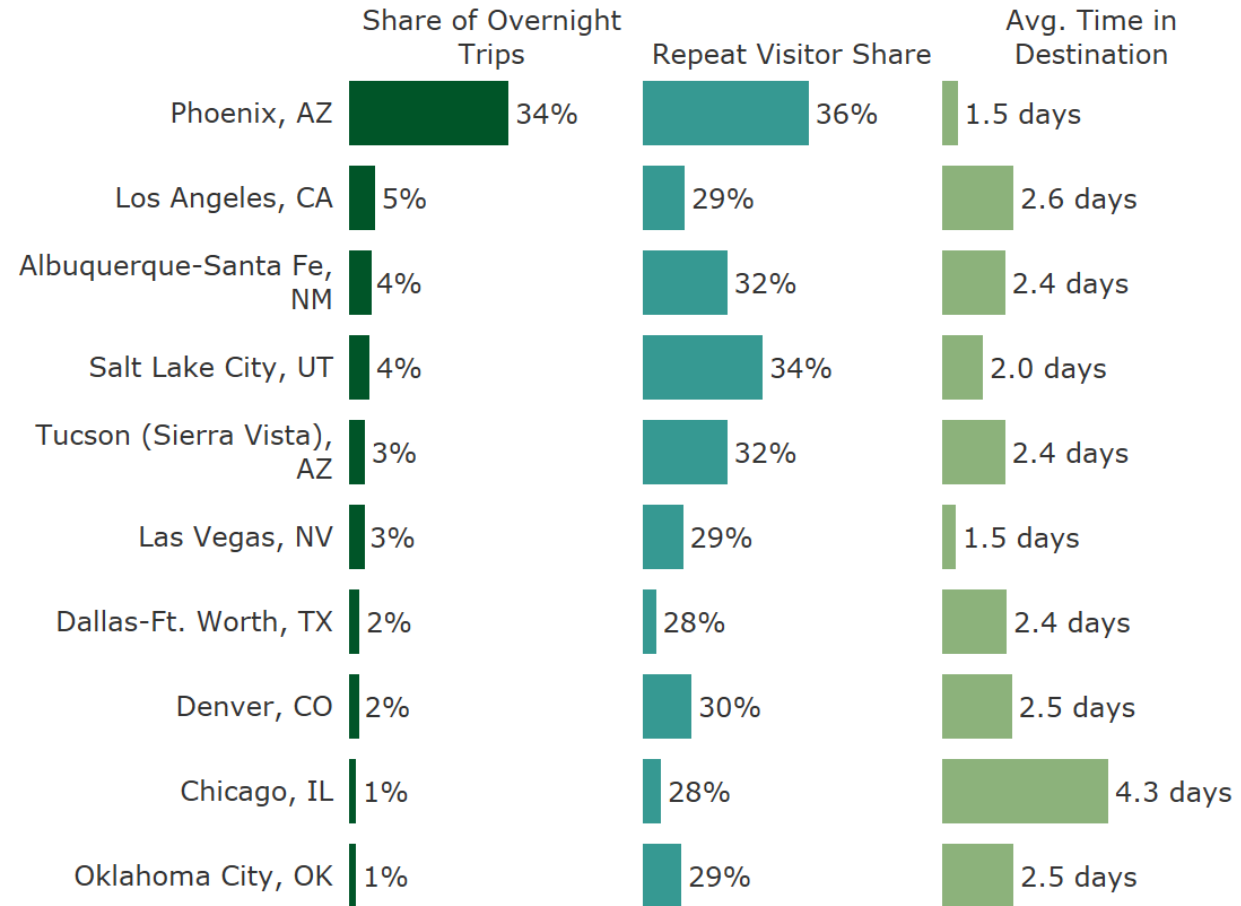
2023 Visitor Summary: Coconino County


80%
 Overnight Visitor Share


53%
 Repeat Visitor Share


2.5 days
 Avg. Time in Destination

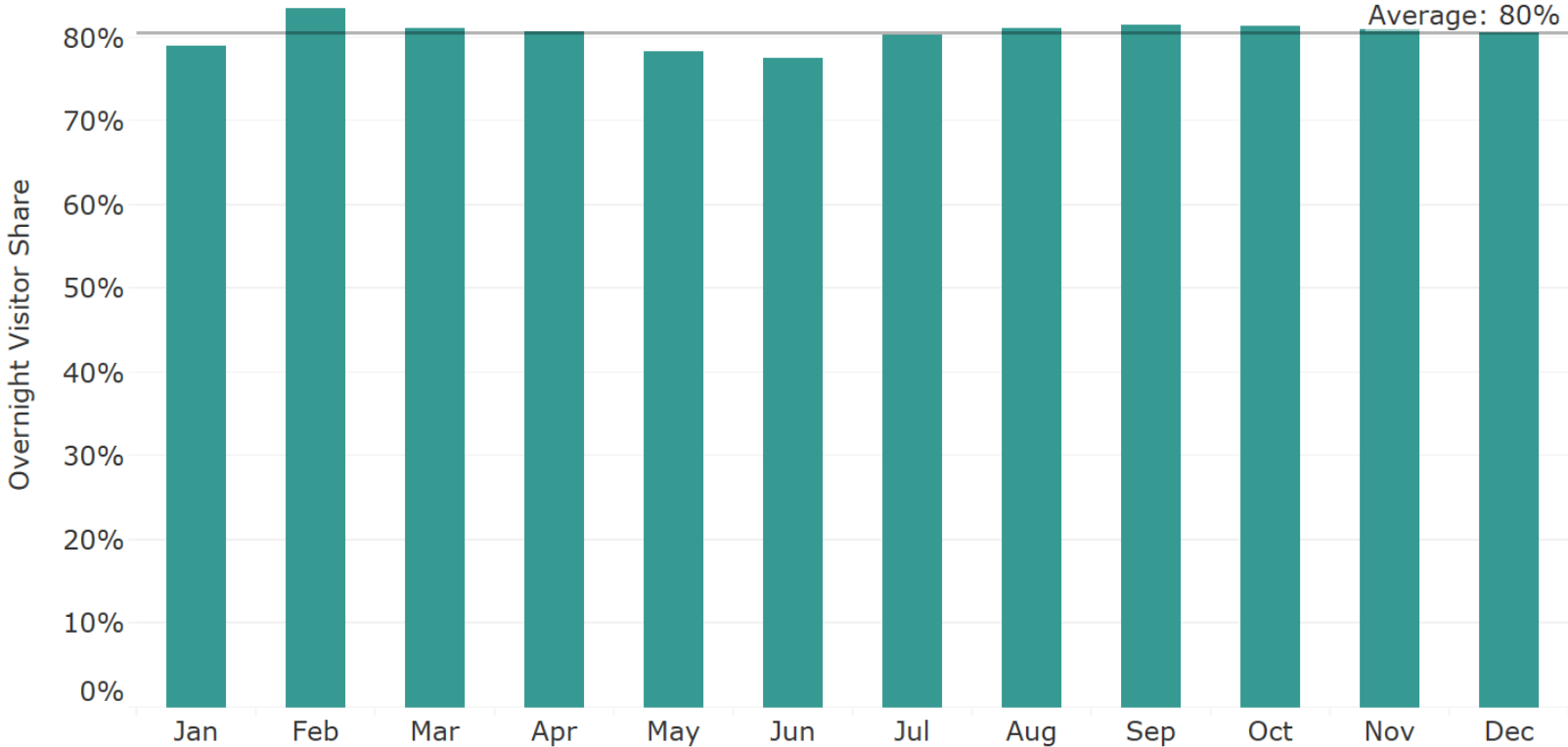
Top 10 Overnight Visitor Origins



Source: Azira

Overnight Visitor Share: Coconino County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

2023 Visitor Summary: Navajo County



84%
Overnight Visitor Share

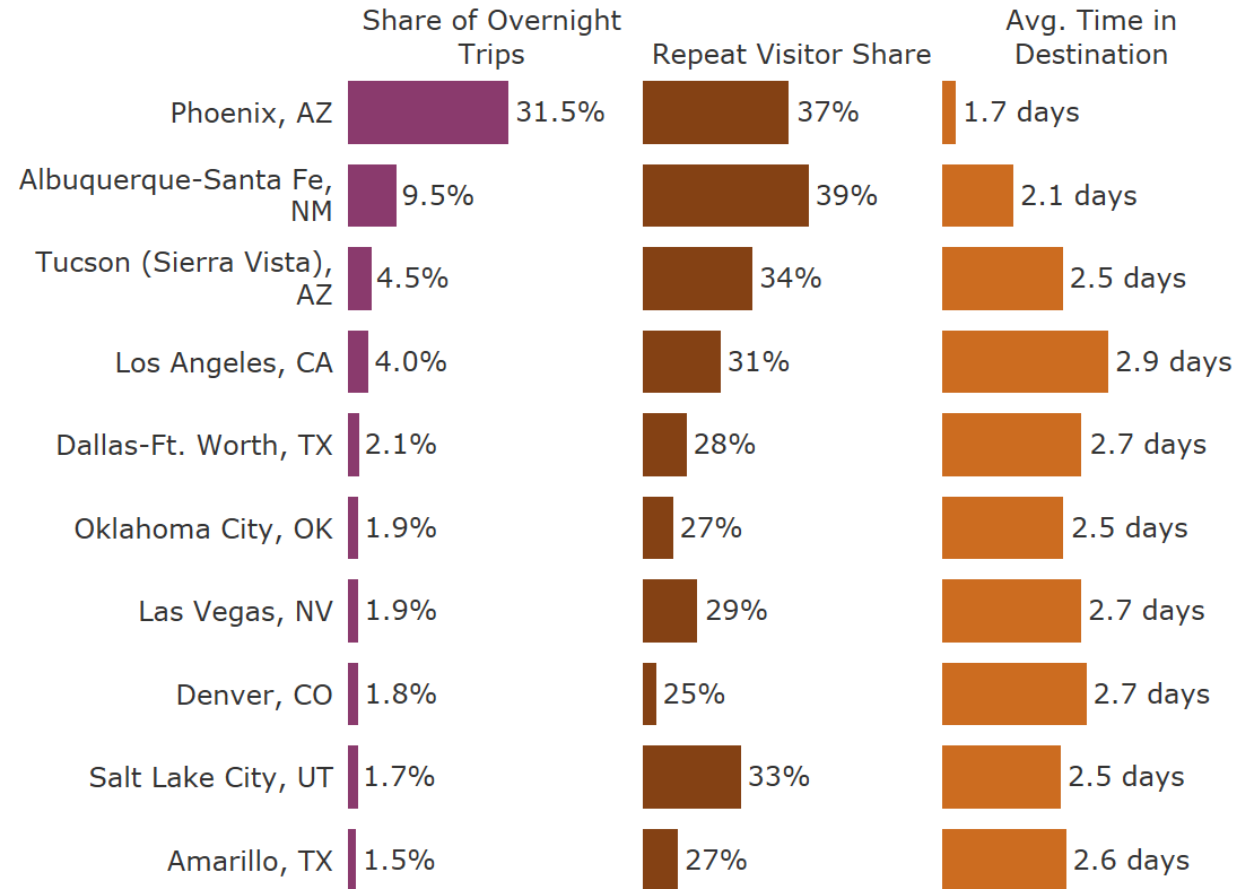


54%
Repeat Visitor Share



2.7 days
Avg. Time in Destination

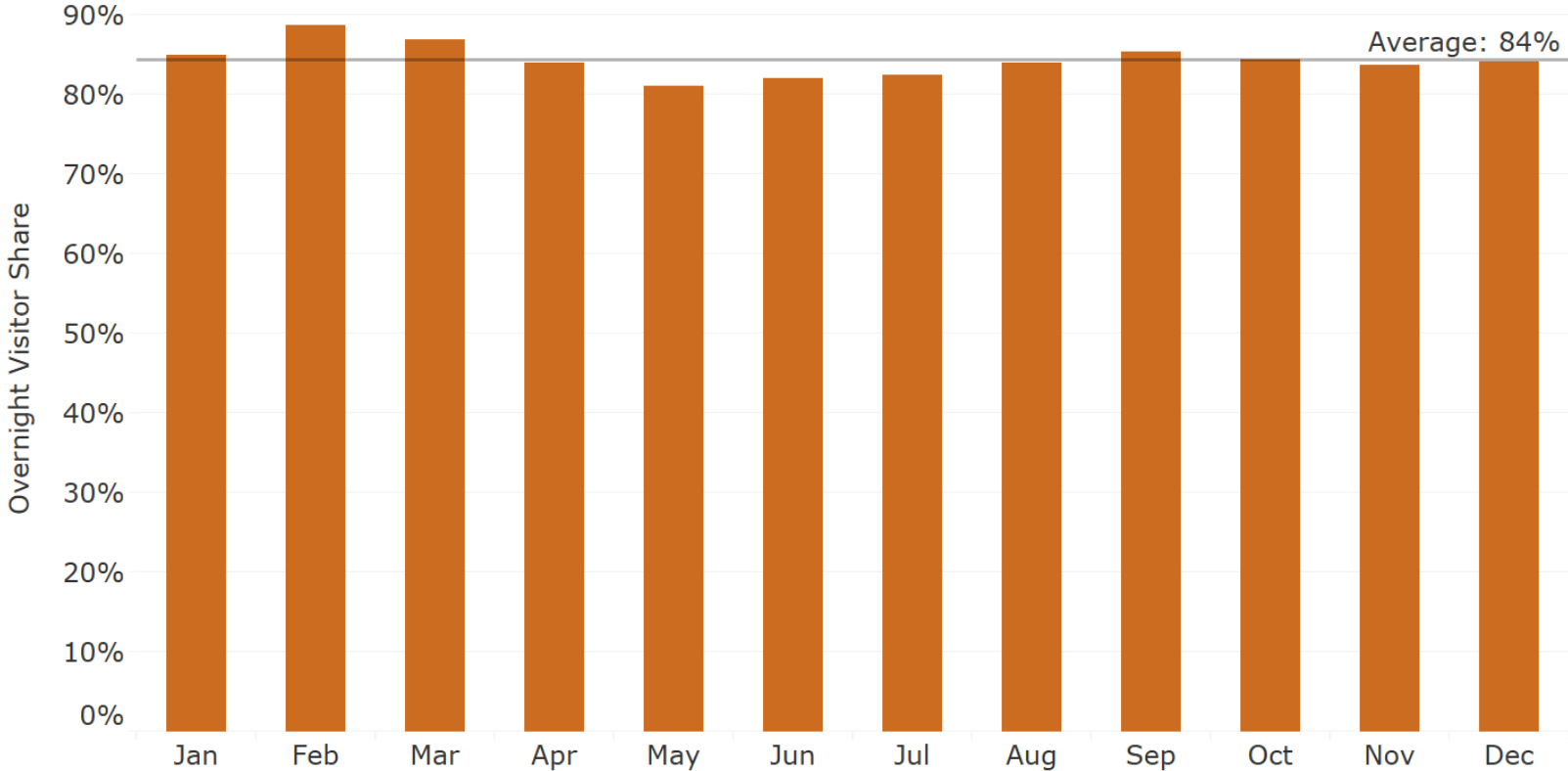
Top 10 Overnight Visitor Origins



Source: Azira

Overnight Visitor Share: Navajo County

2023 Overnight Visitor Share Monthly Trend



Source: Azira