

# TUCSON & SOUTHERN REGION

## TRAVEL RESEARCH TRENDS



# Arizona Travel Impact



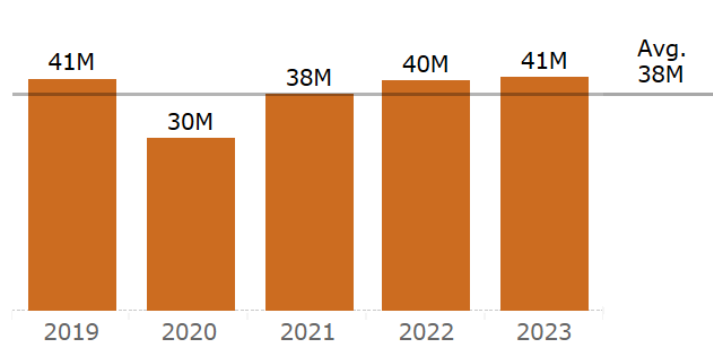
# State Domestic Travel Impact



2023 Total Overnight Visitors

**41M**

+2% YOY | +1% vs. 2019



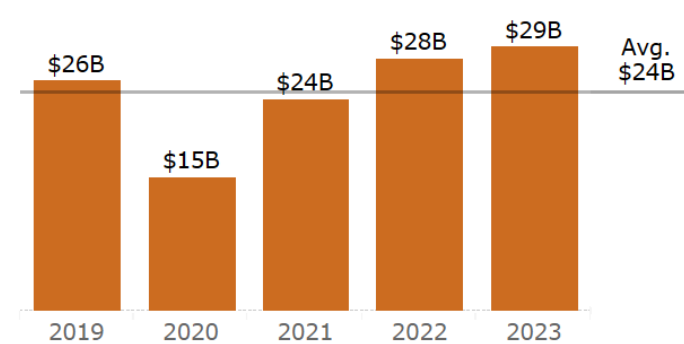
Source: Tourism Economics



2023 Total Spending

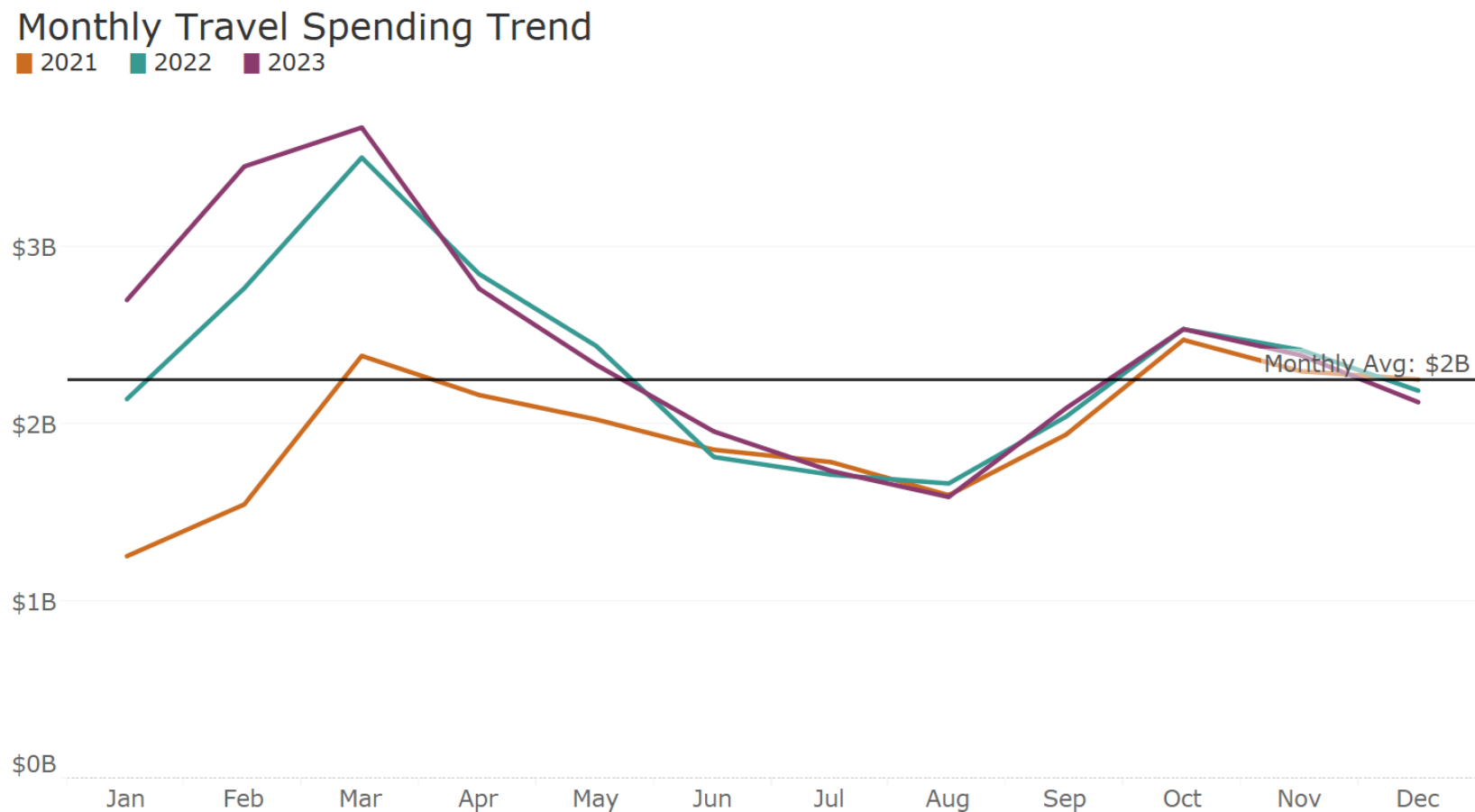
**\$29B**

+5% YOY | +15% vs. 2019



Source: Dean Runyan Associates

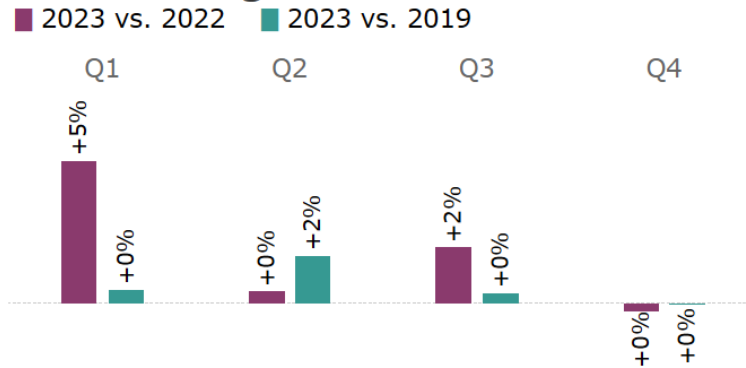
# State Domestic Travel Impact



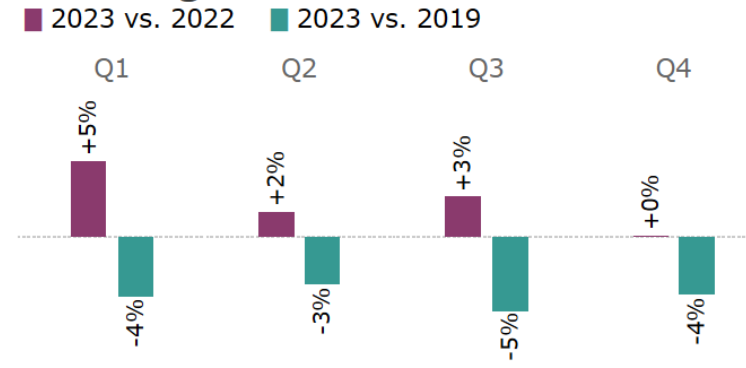
Source: Dean Runyan Associates

# State Domestic Travel Impact

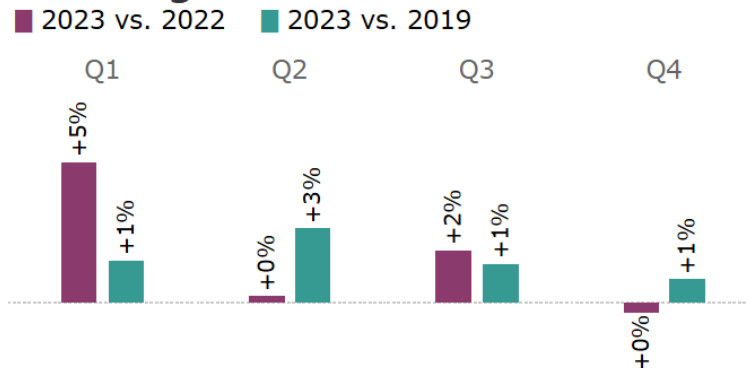
## All Overnight Visitors



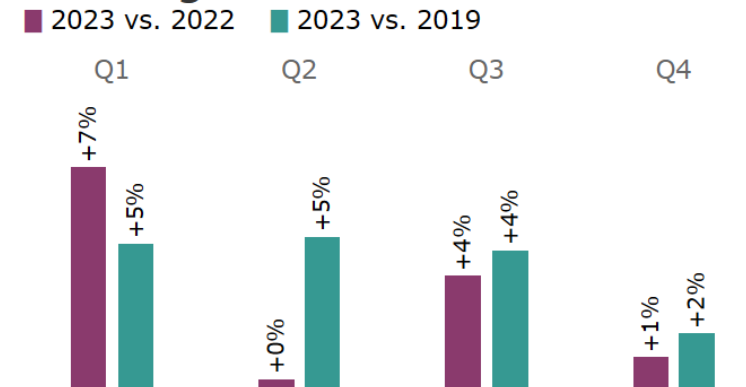
## Overnight Business Visitors



## Overnight Leisure Visitors



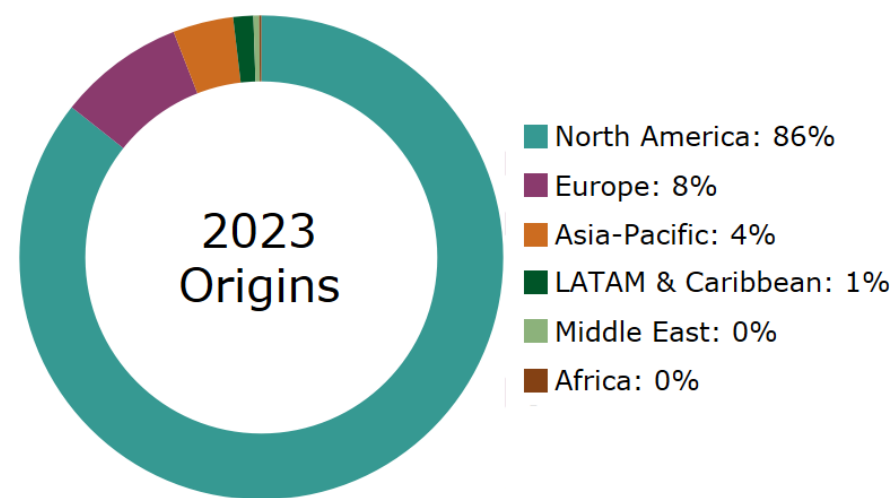
## Overnight Resident Visitors



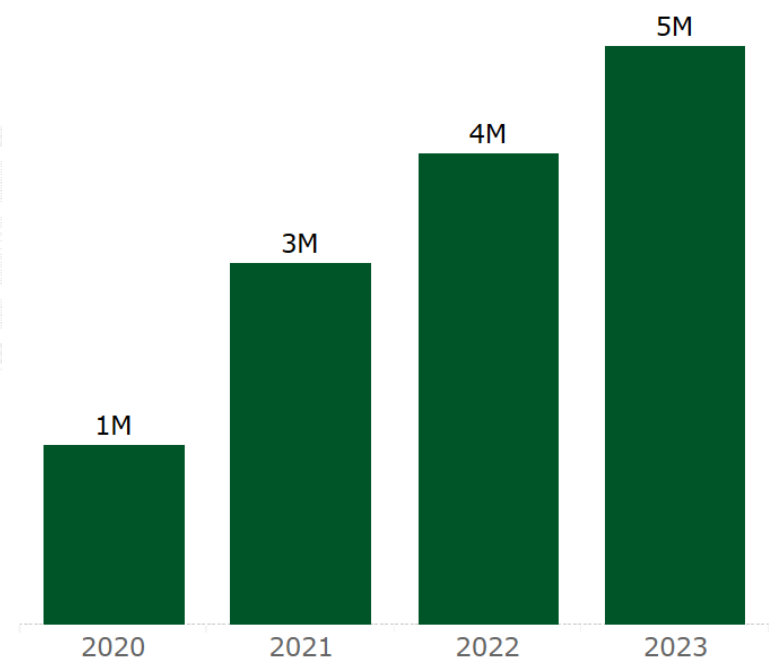
Source: Tourism Economics



# State International Travel Impact



Annual International Overnight Visits  
Last 4 years



Source: Tourism Economics International State Travel

# Travel Impact by County



# 2023 Total Spending: Tucson & Southern Region

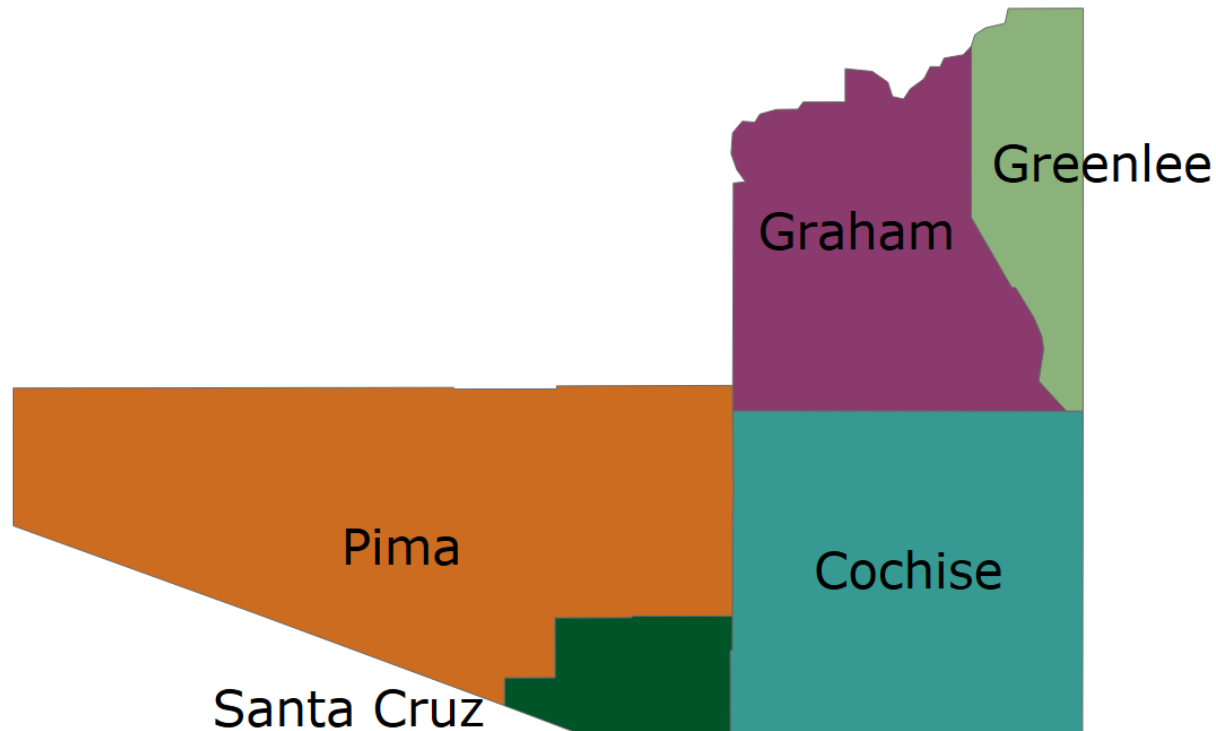
Pima  
\$3B  
+6% YOY

Santa Cruz  
\$288M  
+10% YOY

Graham  
\$78M  
+0% YOY

Greenlee  
\$17M  
+3% YOY

Cochise  
\$390M  
+1% YOY

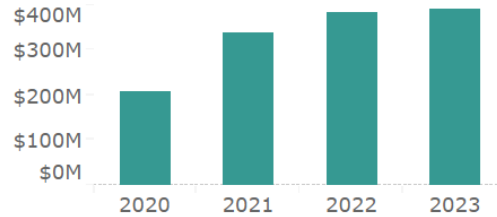


Source: Arizona Travel Impacts, Dean Runyan Associates

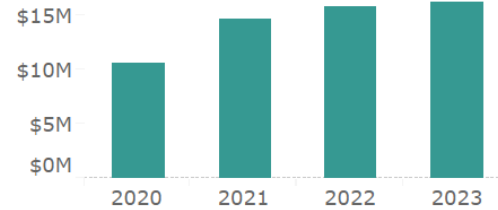


# Travel Impacts: Cochise County

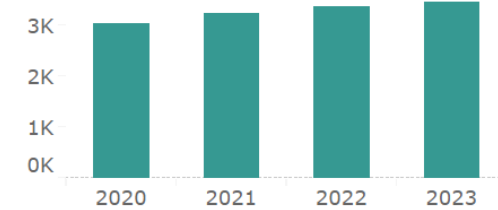
Direct Travel Spending  
**+\$5M**  
+1% YOY



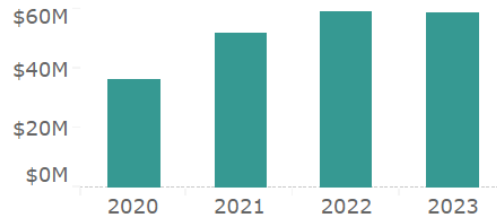
Local Tax Receipts  
**+\$422K**  
+3% YOY



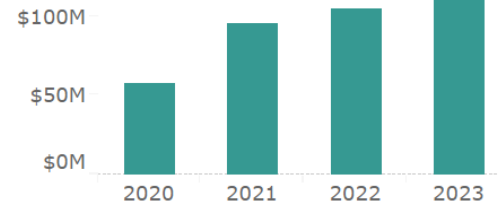
Employment  
**+100**  
+3% YOY



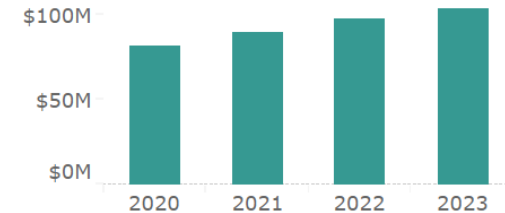
Accommodations Spending  
**-\$581K**  
-1% YOY



Food Service Spending  
**+\$6M**  
+6% YOY



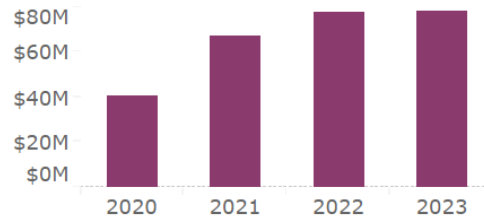
Earnings  
**+\$6M**  
+6% YOY



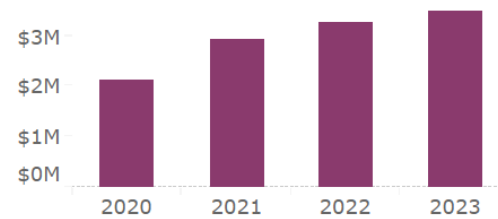
Source: Arizona Travel Impacts, Dean Runyan Associates

# Travel Impacts: Graham County

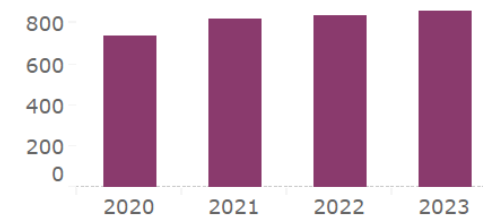
Direct Travel Spending  
**+\$265K**  
+0% YOY



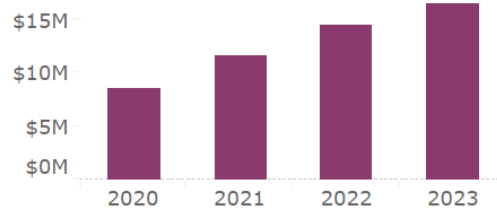
Local Tax Receipts  
**+\$233K**  
+7% YOY



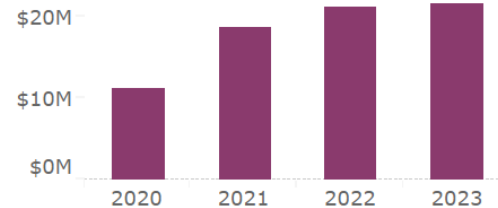
Employment  
**+20**  
+2% YOY



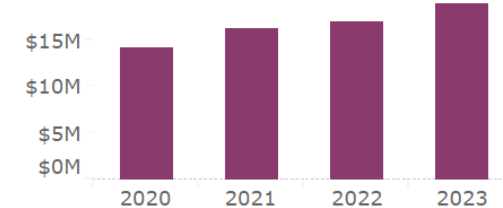
Accommodations Spending  
**+\$2M**  
+15% YOY



Food Service Spending  
**+\$457K**  
+2% YOY



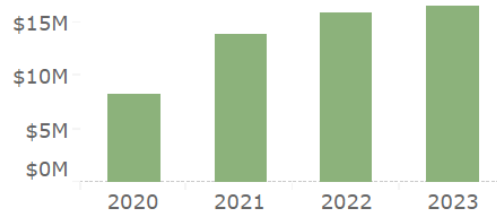
Earnings  
**+\$2M**  
+11% YOY



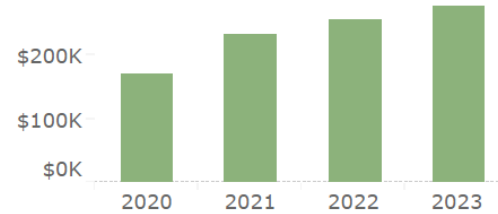
Source: Arizona Travel Impacts, Dean Runyan Associates

# Travel Impacts: Greenlee County

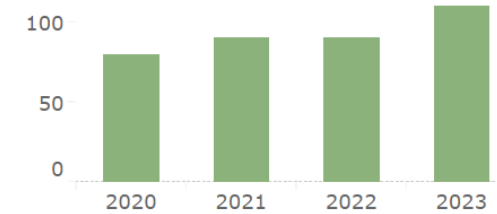
Direct Travel Spending  
**+\$545K**  
+3% YOY



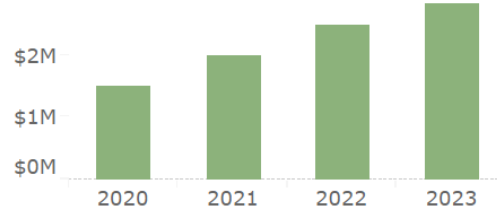
Local Tax Receipts  
**+\$22K**  
+9% YOY



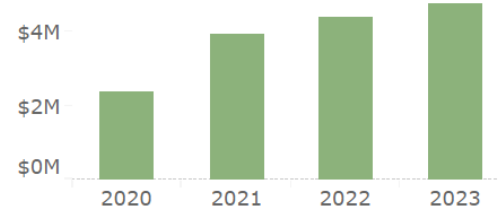
Employment  
**+20**  
+22% YOY



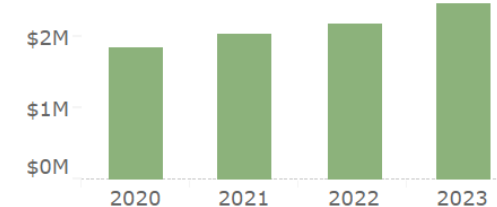
Accommodations Spending  
**+\$358K**  
+14% YOY



Food Service Spending  
**+\$349K**  
+8% YOY

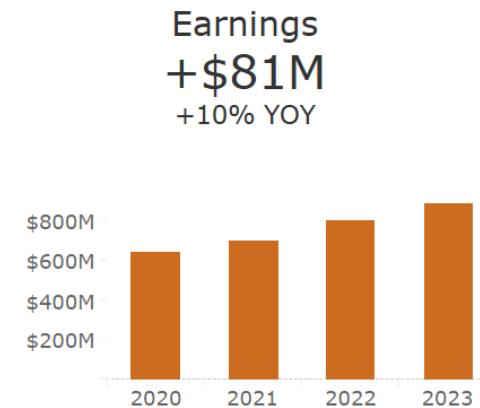
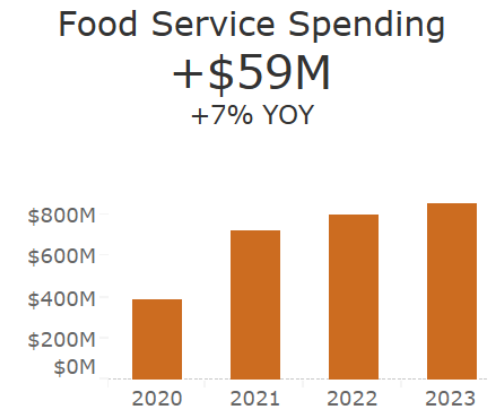
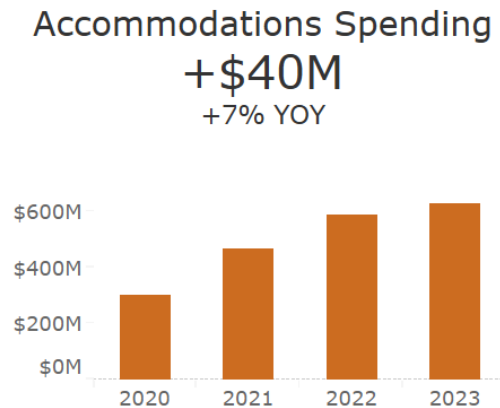
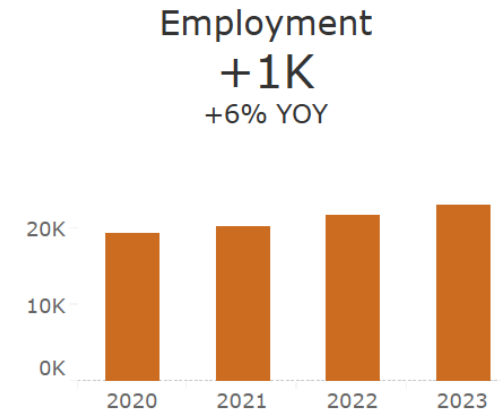
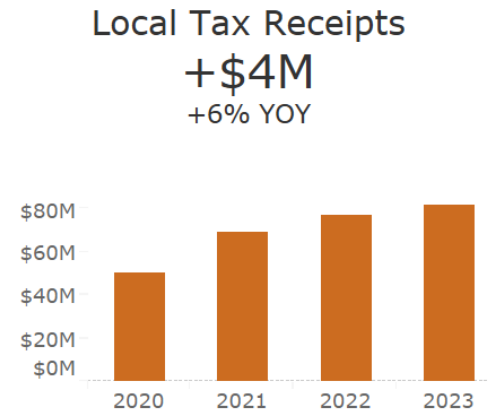
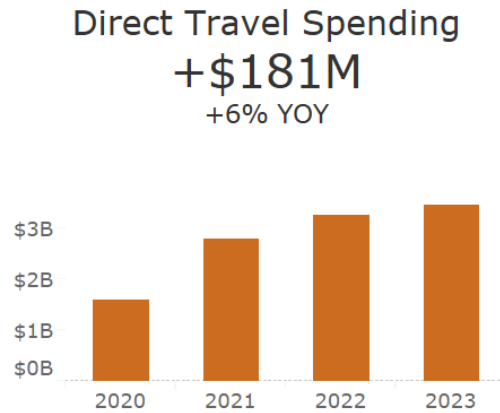


Earnings  
**+\$277K**  
+13% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

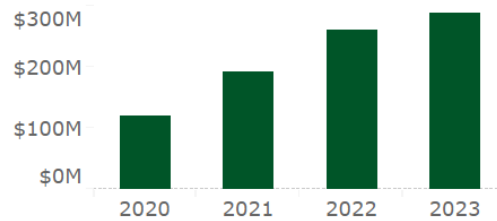
# Travel Impacts: Pima County



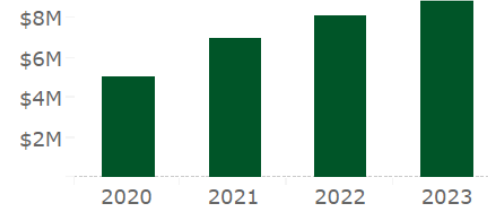
Source: Arizona Travel Impacts, Dean Runyan Associates

# Travel Impacts: Santa Cruz County

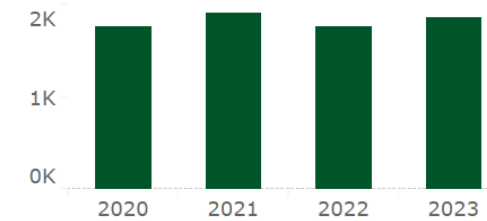
Direct Travel Spending  
**+\$27M**  
+10% YOY



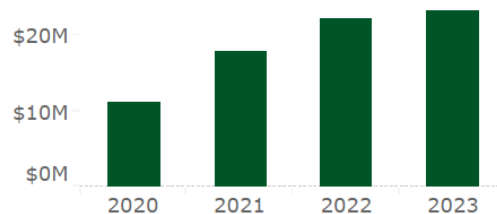
Local Tax Receipts  
**+\$718K**  
+9% YOY



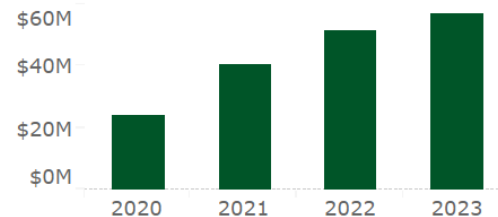
Employment  
**+80**  
+5% YOY



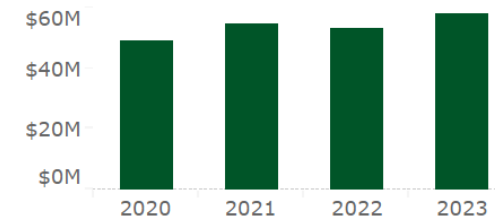
Accommodations Spending  
**+\$1M**  
+5% YOY



Food Service Spending  
**+\$5M**  
+10% YOY

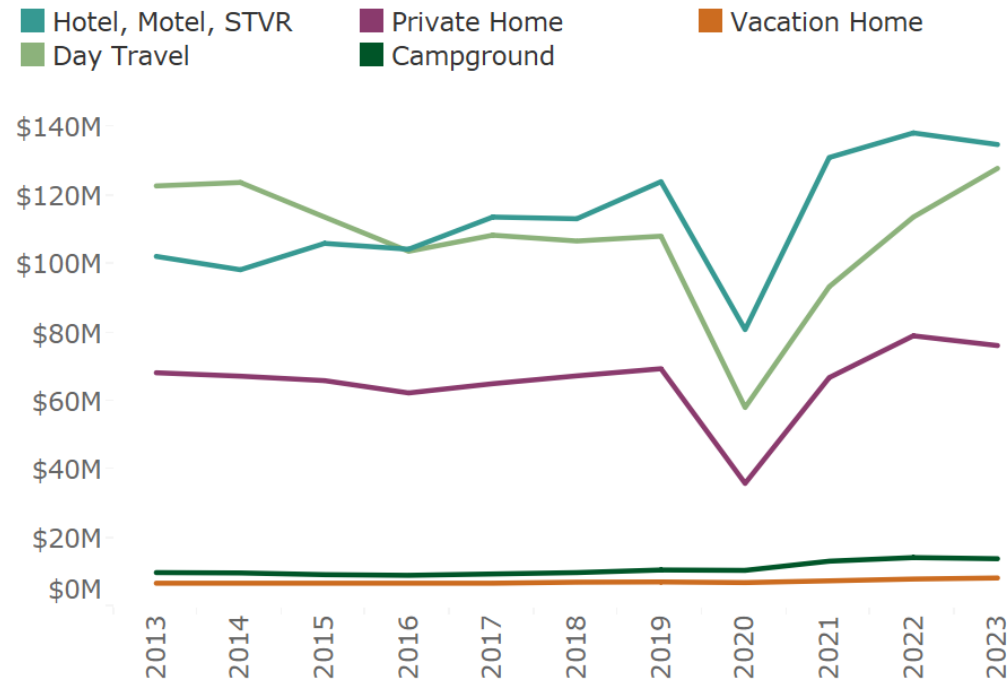
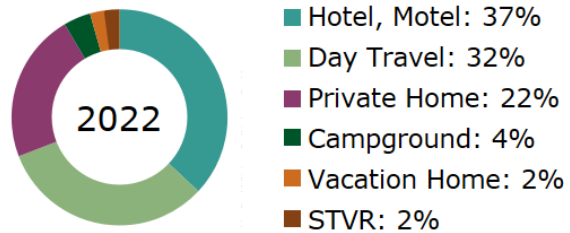
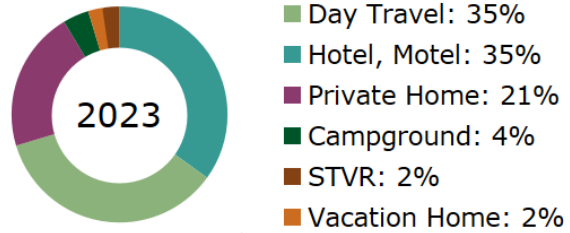


Earnings  
**+\$5M**  
+9% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

# Spend by Accommodation Type: Cochise County

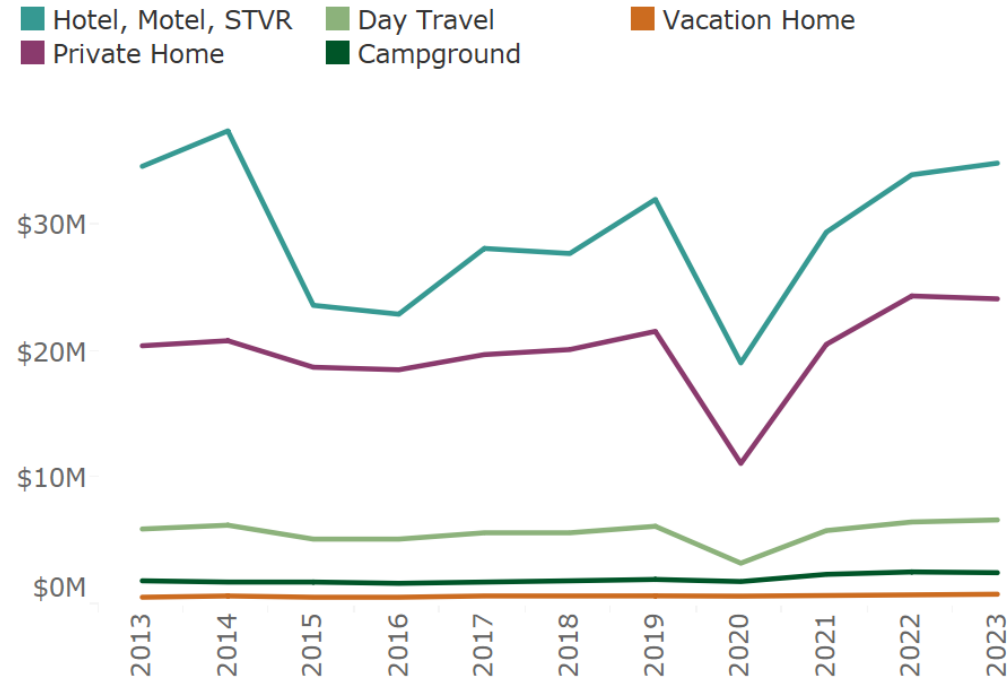
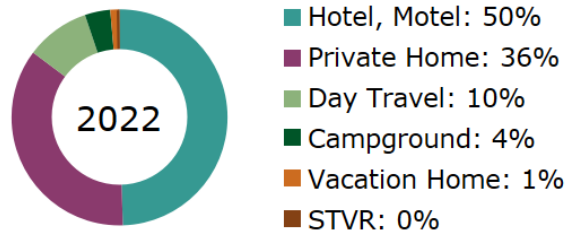
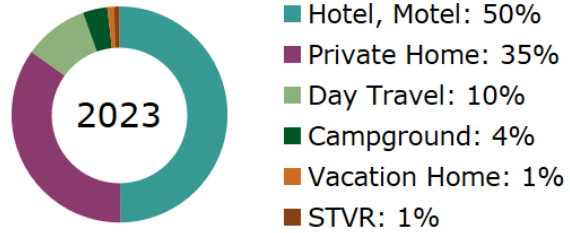


Source: Arizona Travel Impacts, Dean Runyan Associates

\* STVR stands for Short-Term Vacation Rental



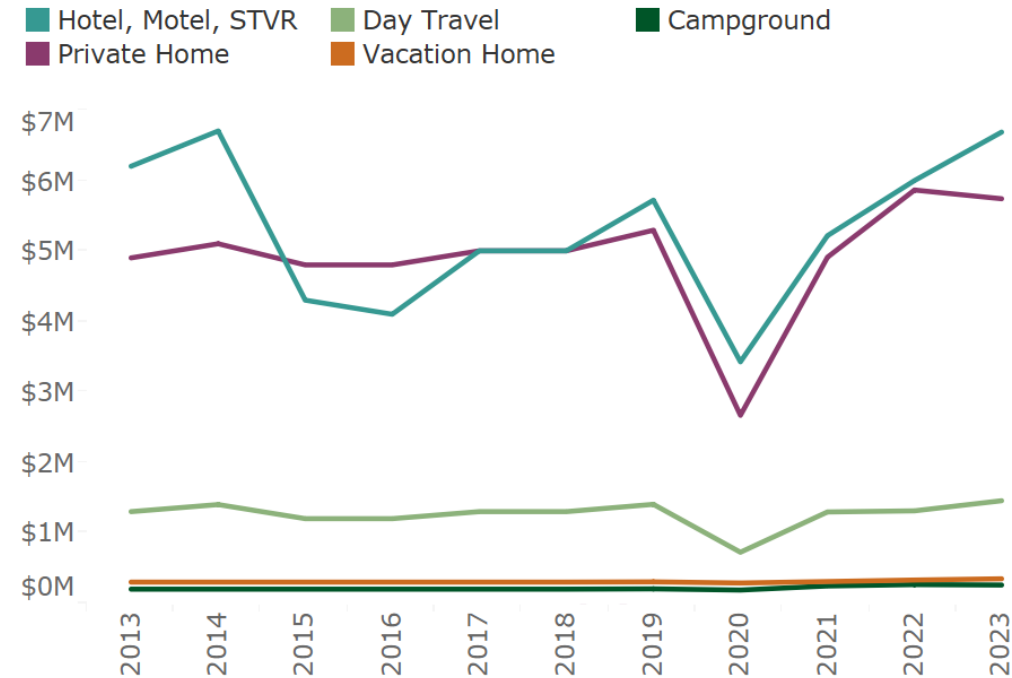
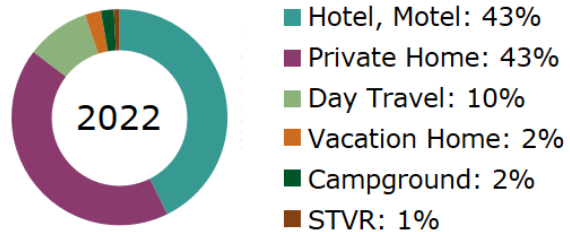
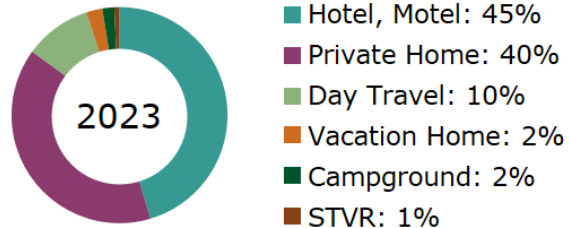
# Spend by Accommodation Type: Graham County



Source: Arizona Travel Impacts, Dean Runyan Associates

\* STVR stands for Short-Term Vacation Rental

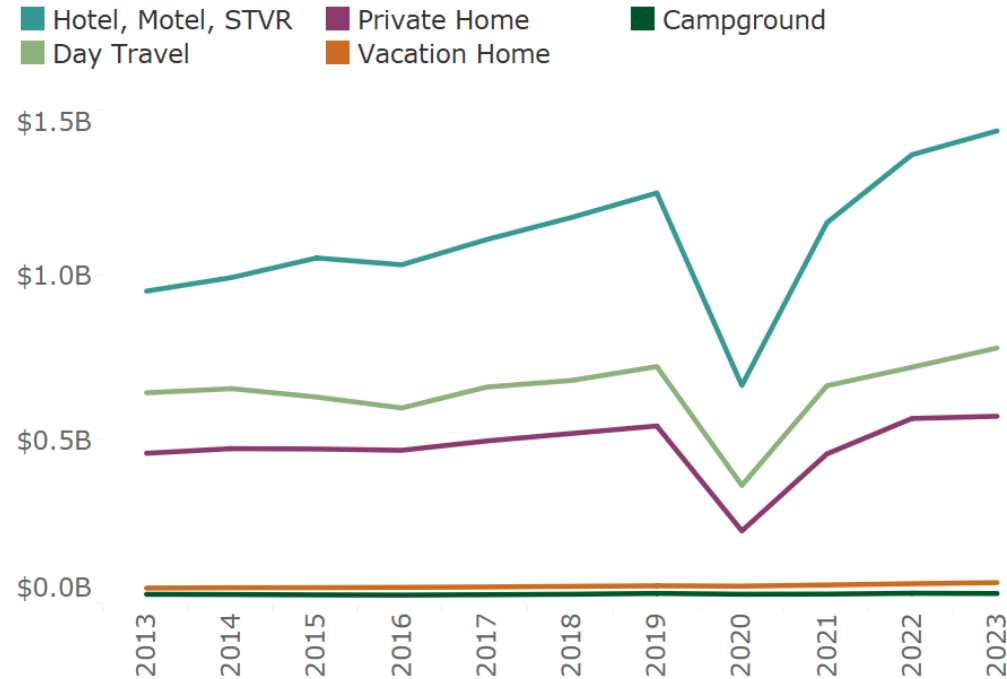
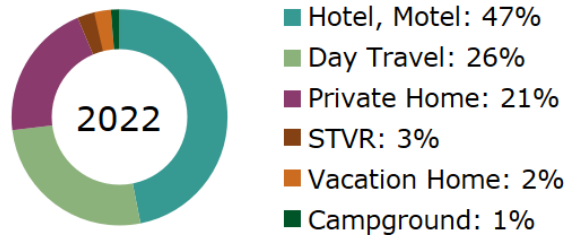
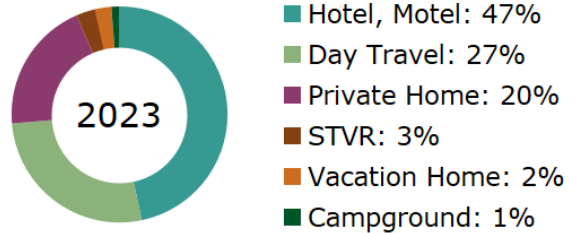
# Spend by Accommodation Type: Greenlee County



Source: Arizona Travel Impacts, Dean Runyan Associates

\* STVR stands for Short-Term Vacation Rental

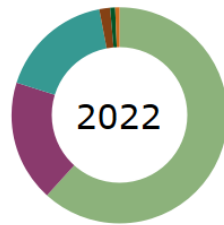
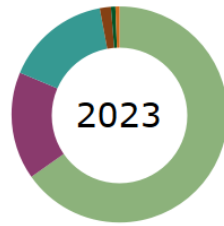
# Spend by Accommodation Type: Pima County



Source: Arizona Travel Impacts, Dean Runyan Associates

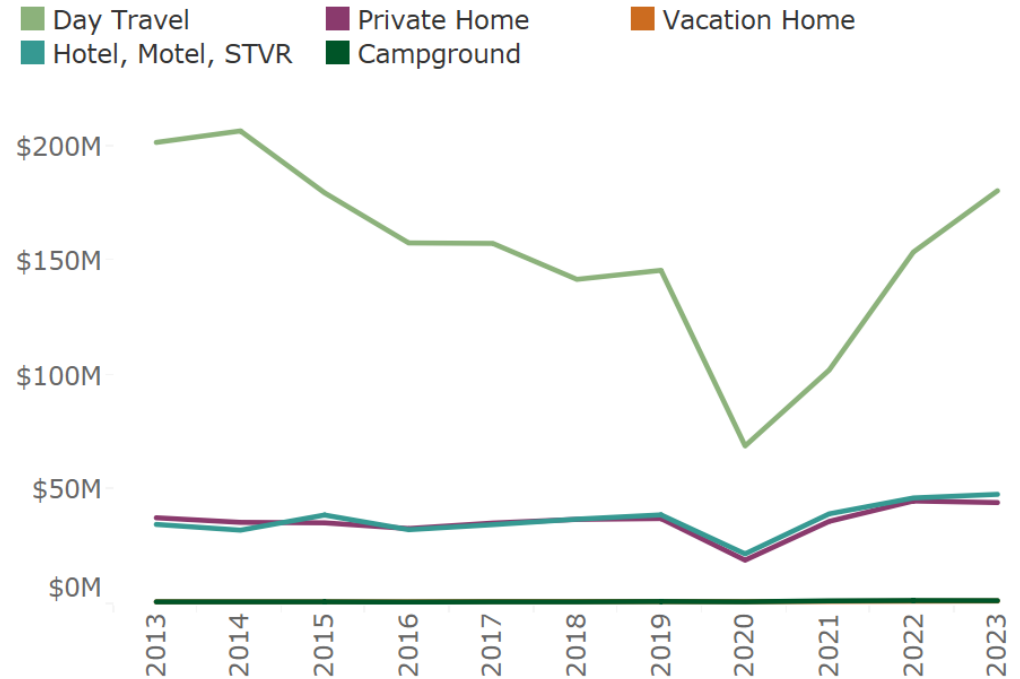
\* STVR stands for Short-Term Vacation Rental

# Spend by Accommodation Type: Santa Cruz County



Day Travel: 65%  
Private Home: 16%  
Hotel, Motel, STVR: 16%  
STVR: 2%  
Campground: 1%  
Vacation Home: 1%

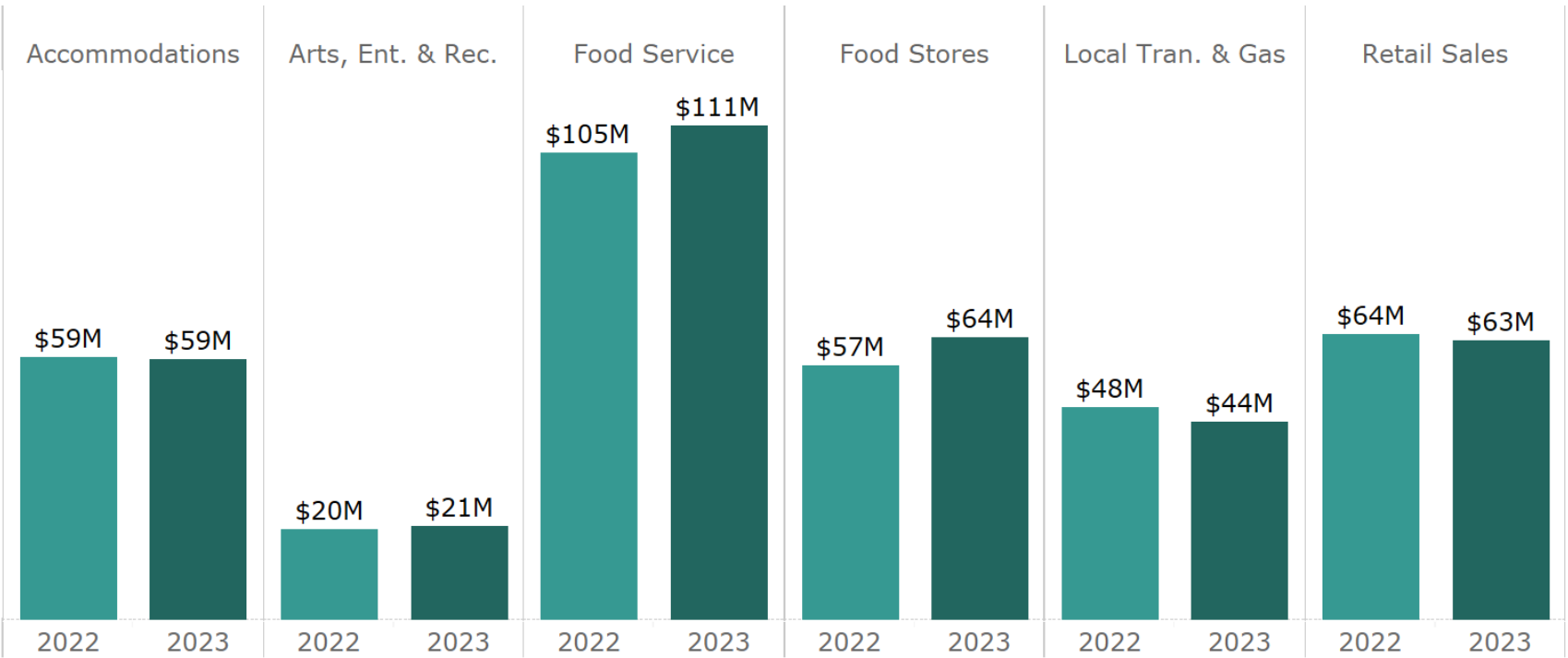
Day Travel: 62%  
Private Home: 18%  
Hotel, Motel, STVR: 17%  
STVR: 2%  
Campground: 1%  
Vacation Home: 1%



Source: Arizona Travel Impacts, Dean Runyan Associates

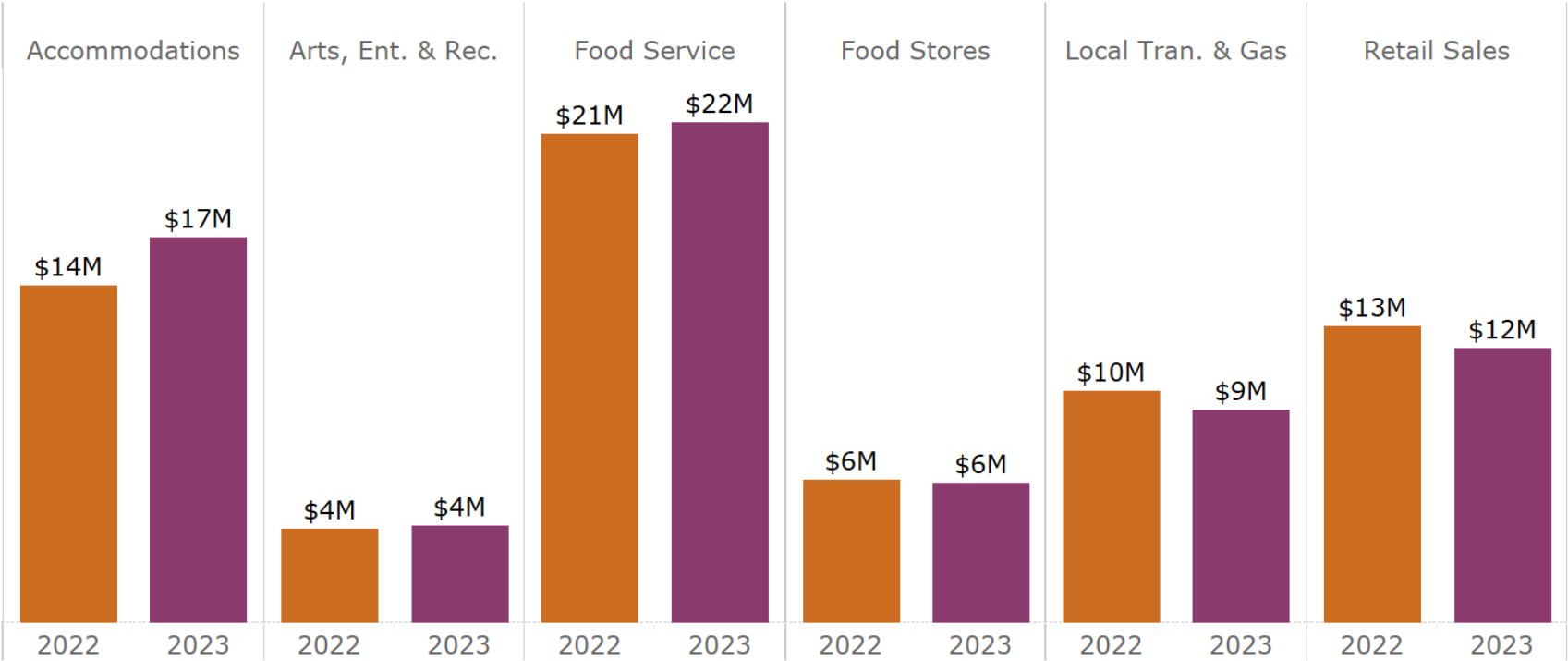
\* STVR stands for Short-Term Vacation Rental

# Spend by Commodity: Cochise County



Source: Arizona Travel Impacts, Dean Runyan Associates

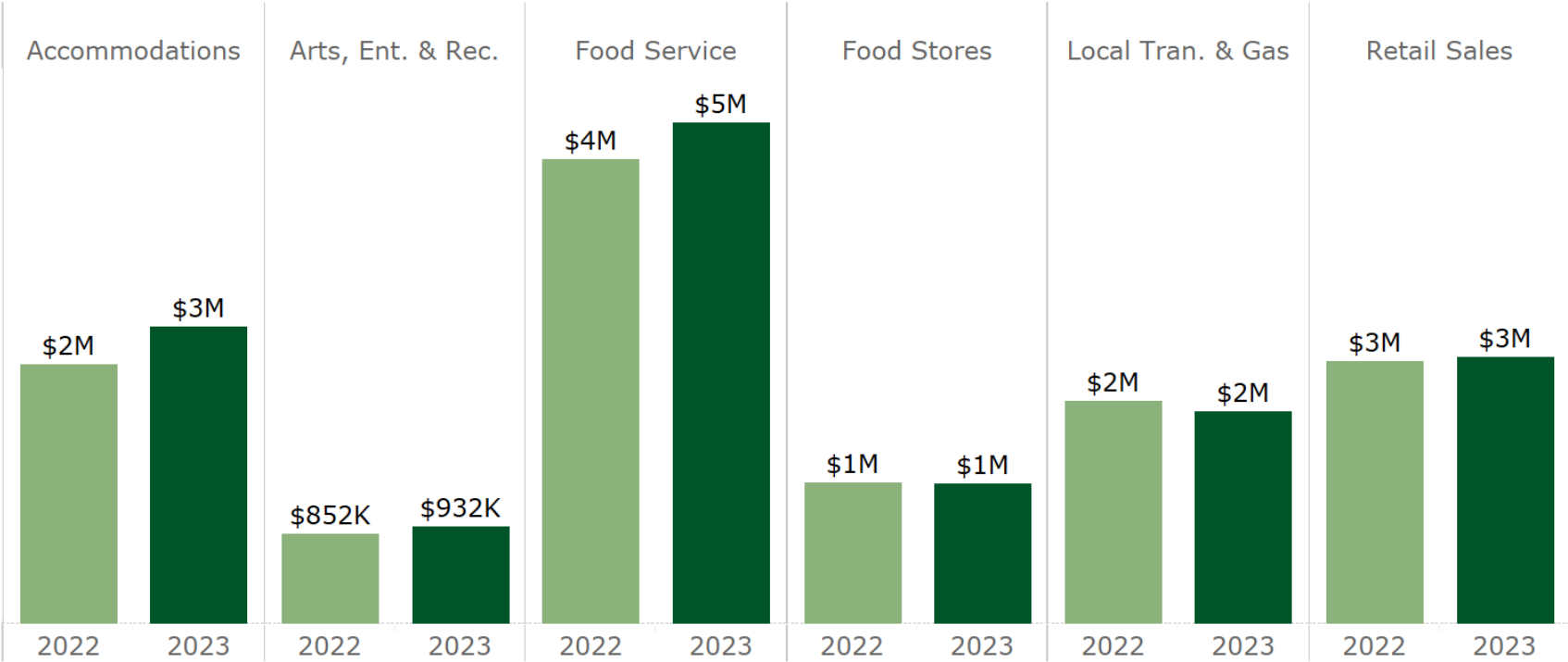
# Spend by Commodity: Graham County



Source: Arizona Travel Impacts, Dean Runyan Associates

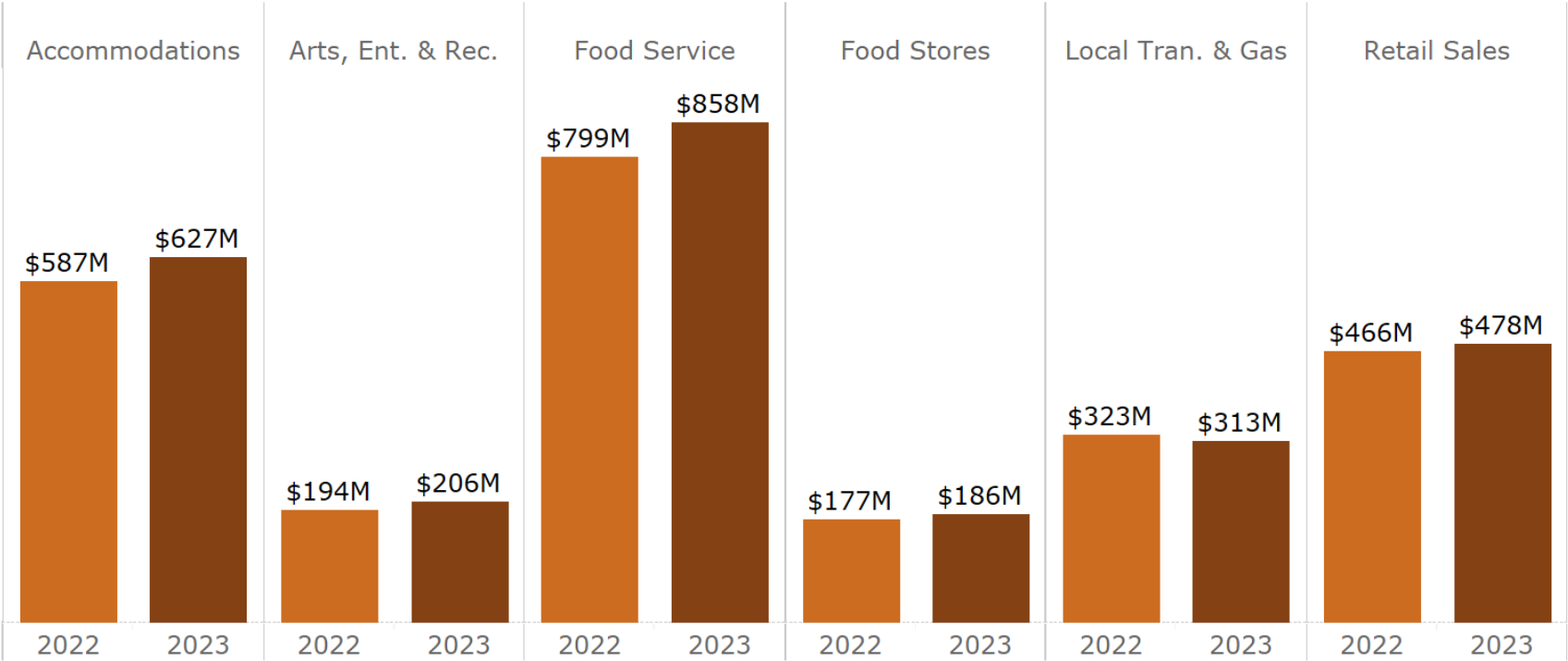


# Spend by Commodity: Greenlee County



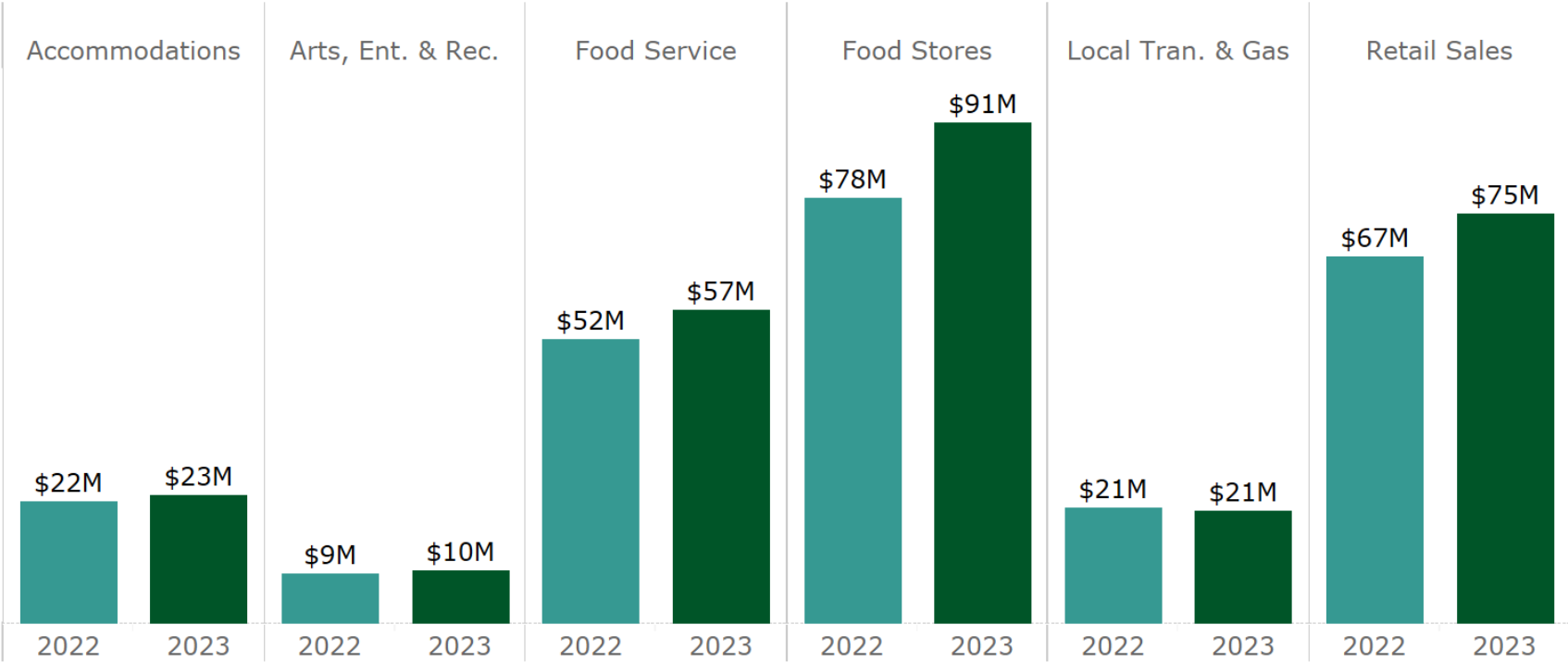
Source: Arizona Travel Impacts, Dean Runyan Associates

# Spend by Commodity: Pima County



Source: Arizona Travel Impacts, Dean Runyan Associates

# Spend by Commodity: Santa Cruz County



Source: Arizona Travel Impacts, Dean Runyan Associates

# Lodging Performance



# Short-Term Rentals: Tucson & Southern Region

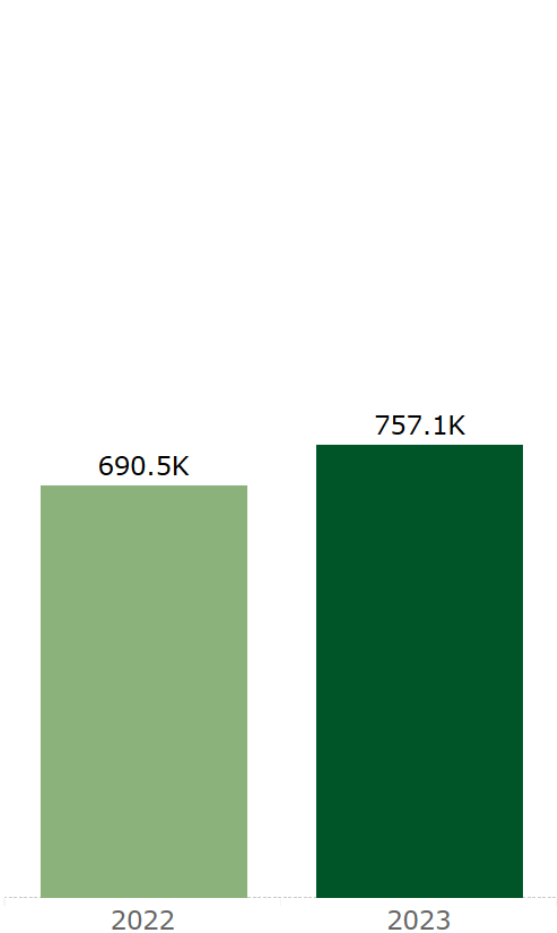
## Year-to-Date Supply

Jan - Dec All Properties Available



## Year-to-Date Demand

Jan - Dec Nights Sold at All Properties



Source: AirDNA

# Airport Passenger Traffic

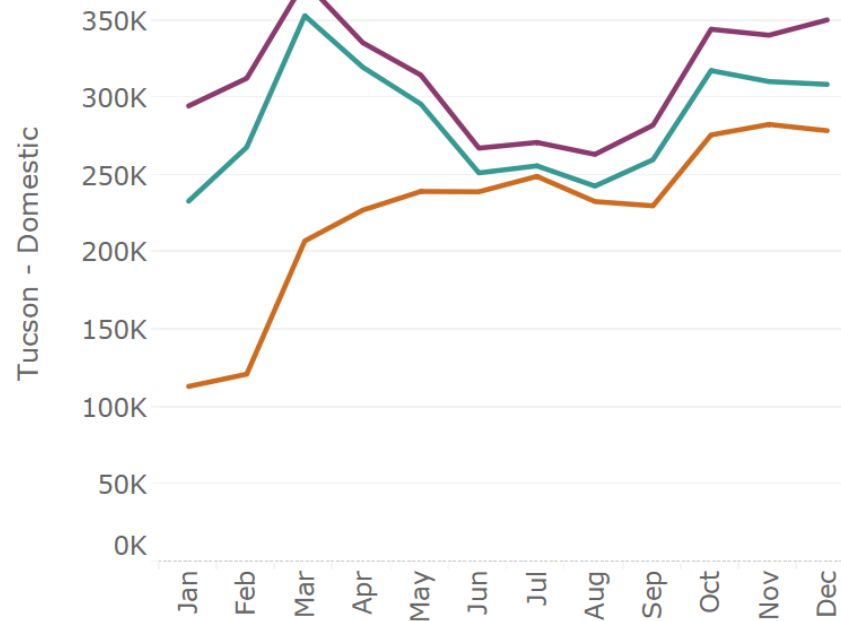




# Airport Passengers: Tucson & Southern Region

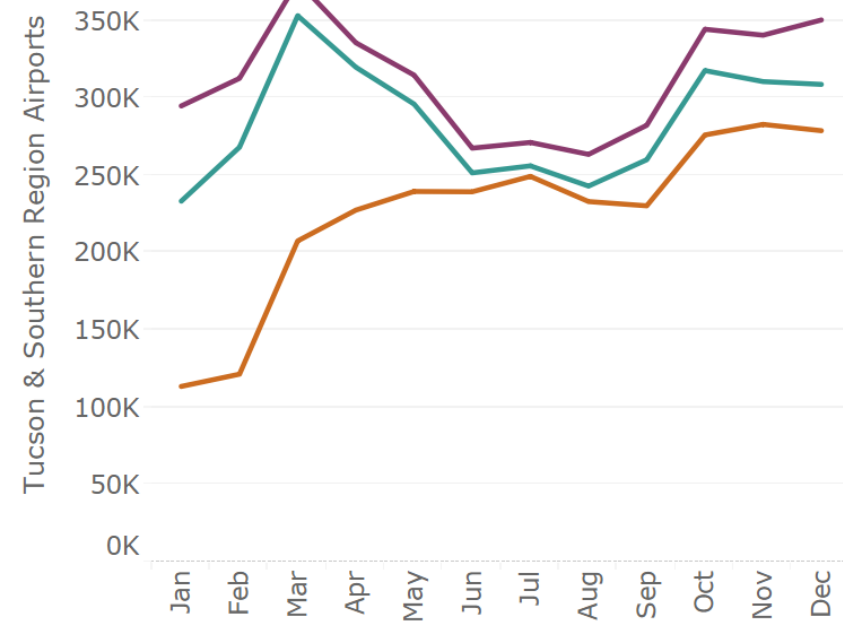
Airport Hub

2021 2022 2023



Region Airports

2021 2022 2023



Tucson Domestic & International

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

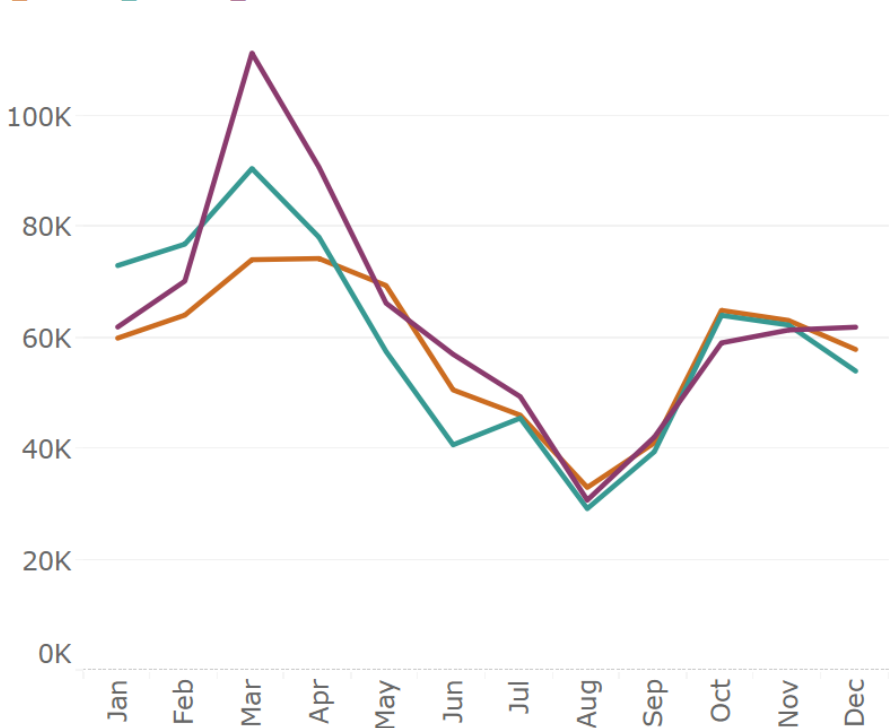
# National & State Parks



# State Parks: Tucson & Southern Region

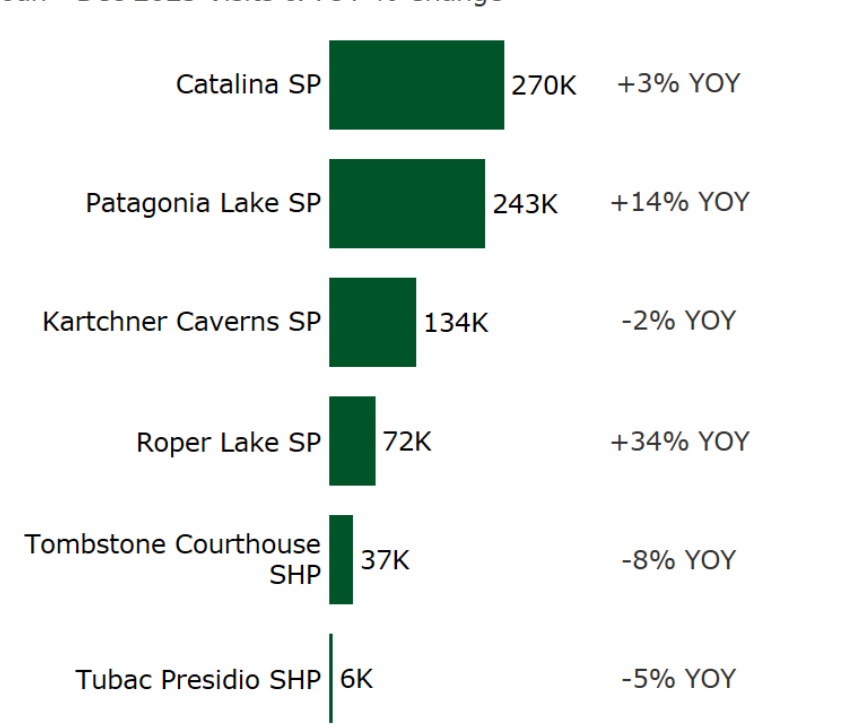
State Parks Visitation Monthly Trend

2021 2022 2023



Year-to-Date Park Visitation

Jan - Dec 2023 Visits & YOY % Change

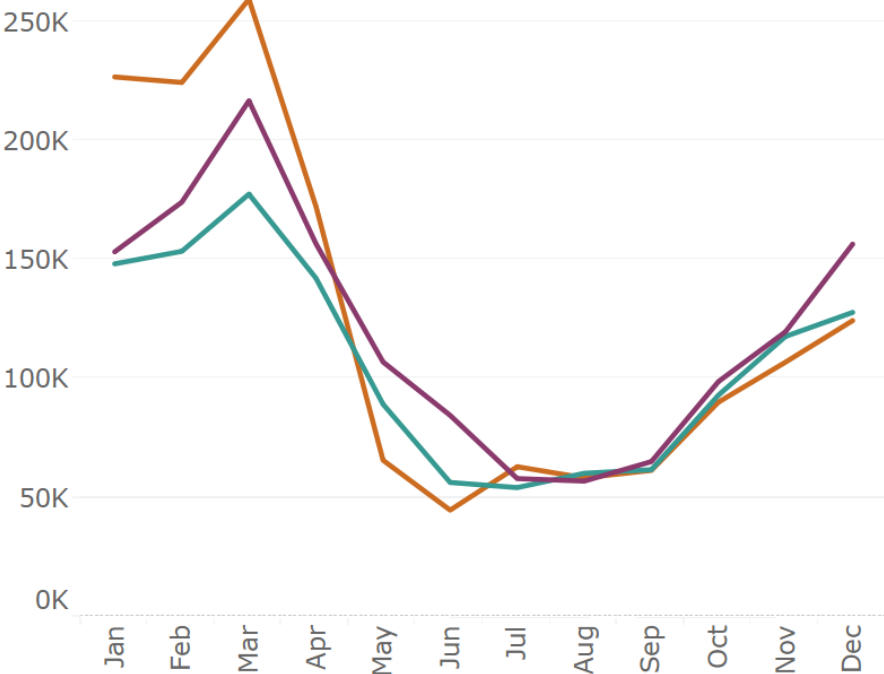


Source: Northern Arizona University, Arizona State Parks

# National Parks: Tucson & Southern Region

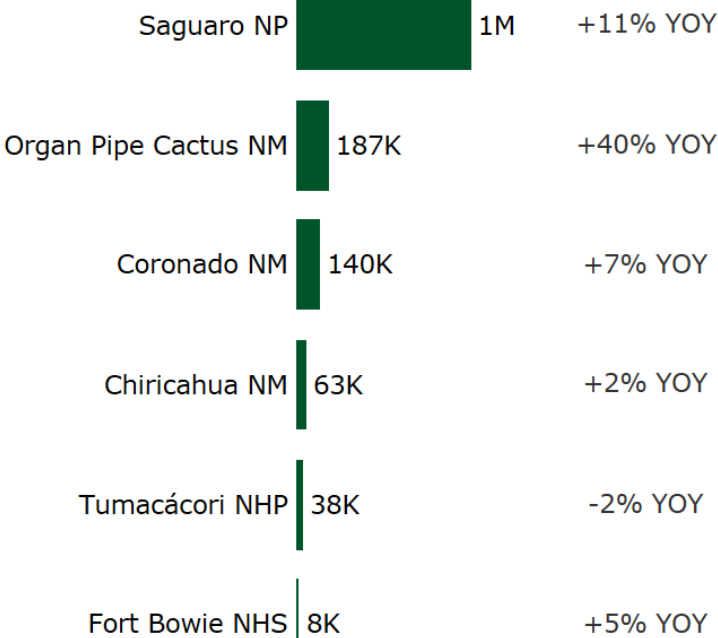
National Parks Visitation Monthly Trend

2021 2022 2023



Year-to-Date Park Visitation

Jan - Dec 2023 Visits & YOY % Change



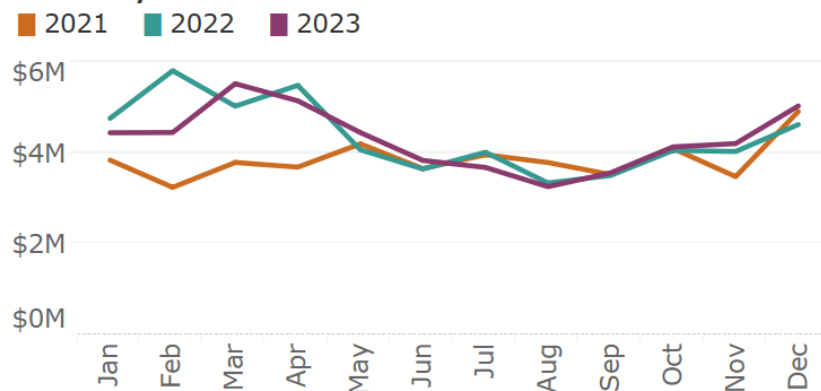
Source: Northern Arizona University, National Park Service

# Gross Sales

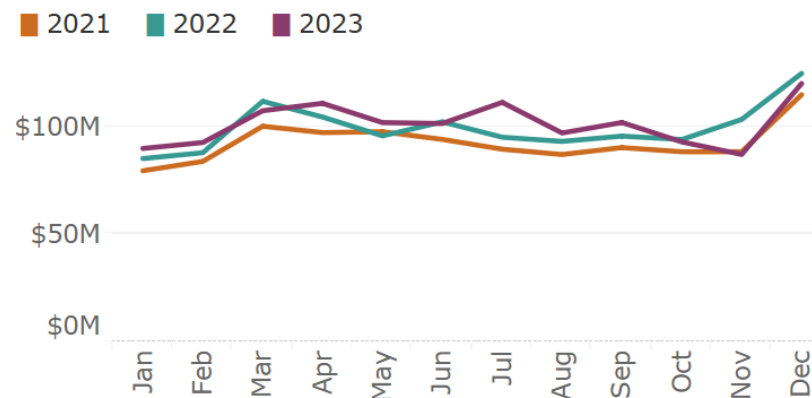


# Gross Sales: Cochise County

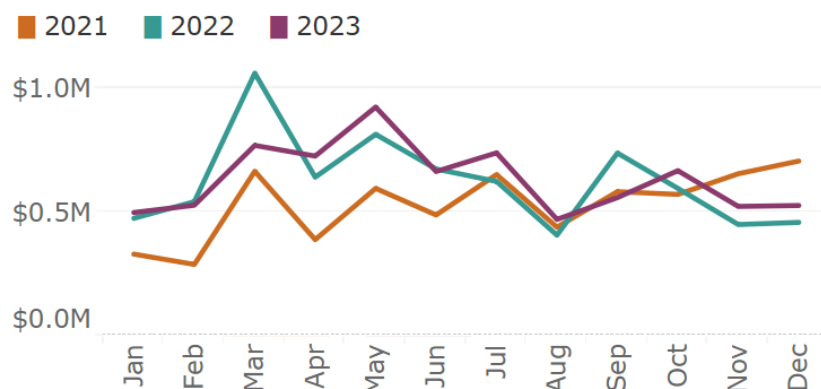
## Hotel/Motel



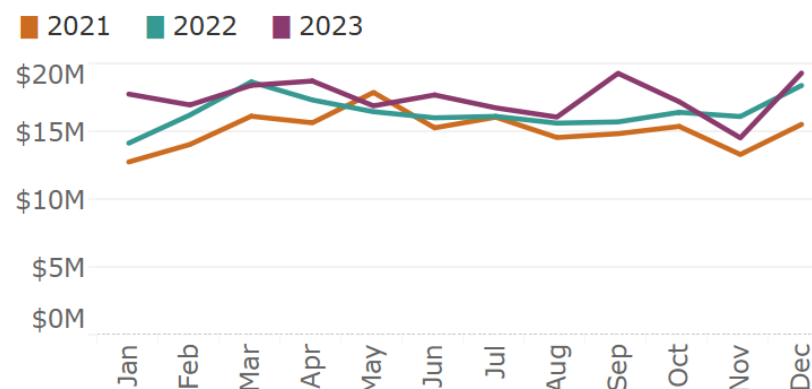
## Retail



## Amusement



## Restaurant



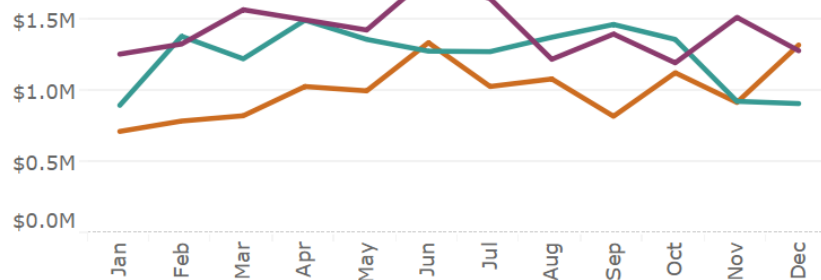
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue



# Gross Sales: Graham/Greenlee/La Paz County

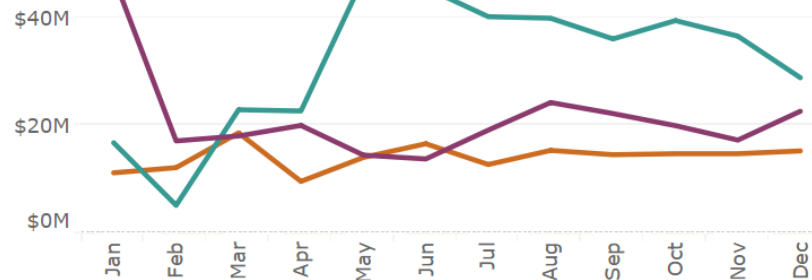
## Hotel/Motel

2021 2022 2023



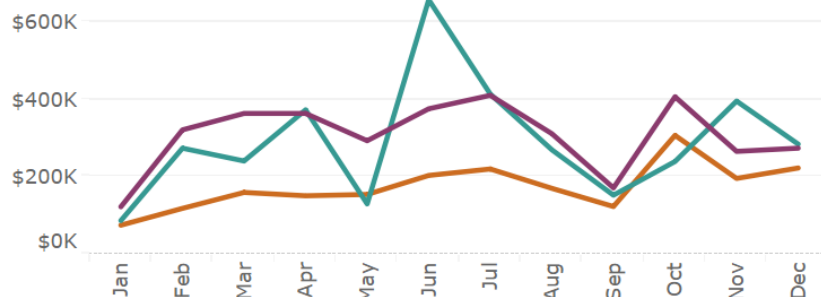
## Retail

2021 2022 2023



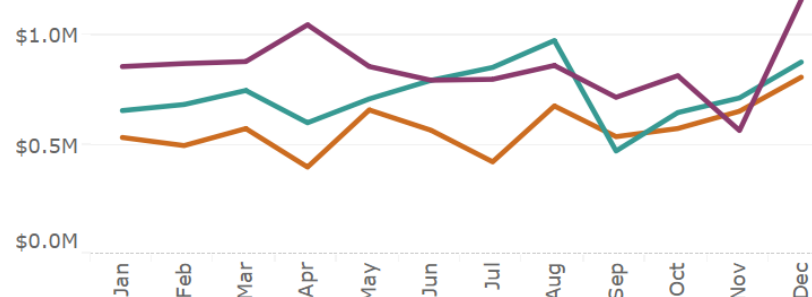
## Amusement

2021 2022 2023



## Restaurant

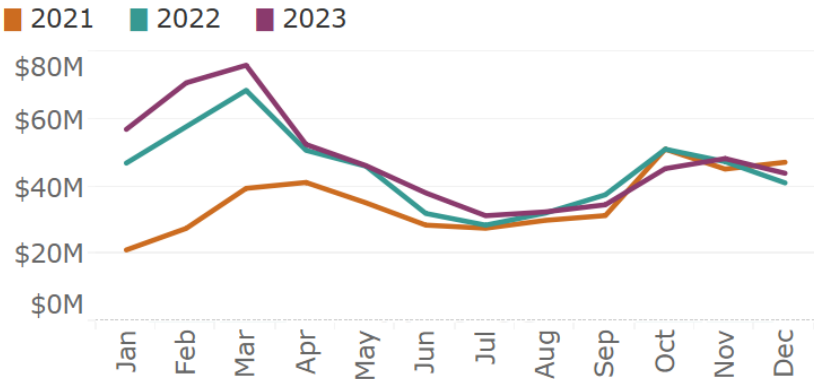
2021 2022 2023



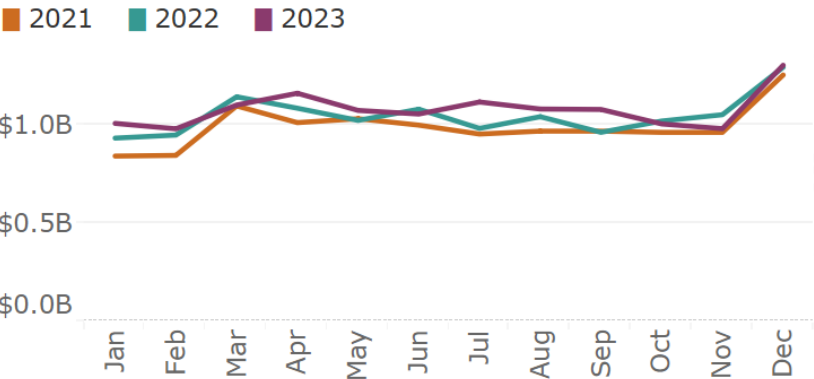
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

# Gross Sales: Pima County

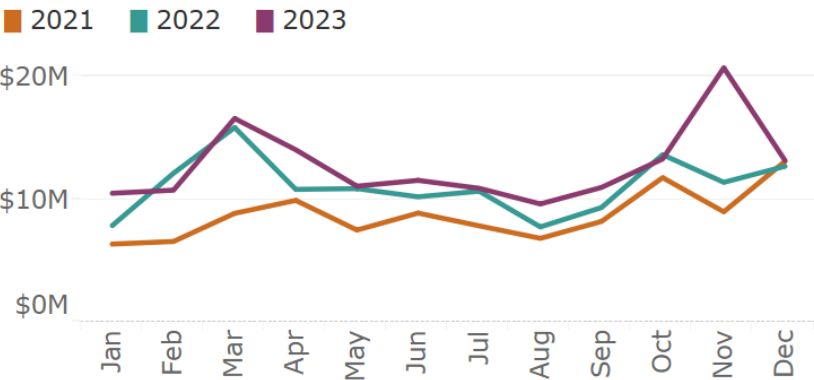
## Hotel/Motel



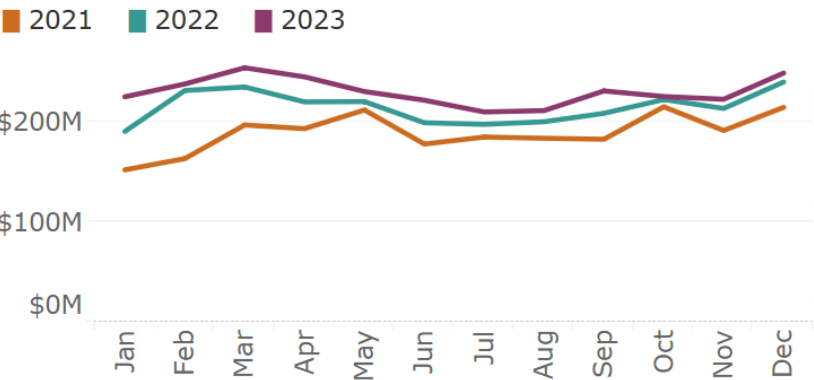
## Retail



## Amusement



## Restaurant

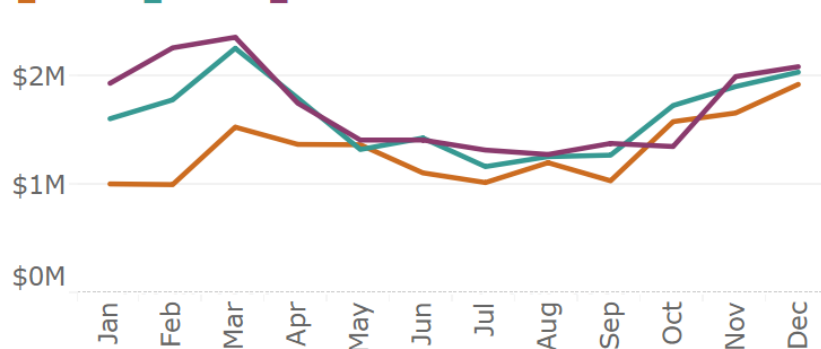


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

# Gross Sales: Santa Cruz County

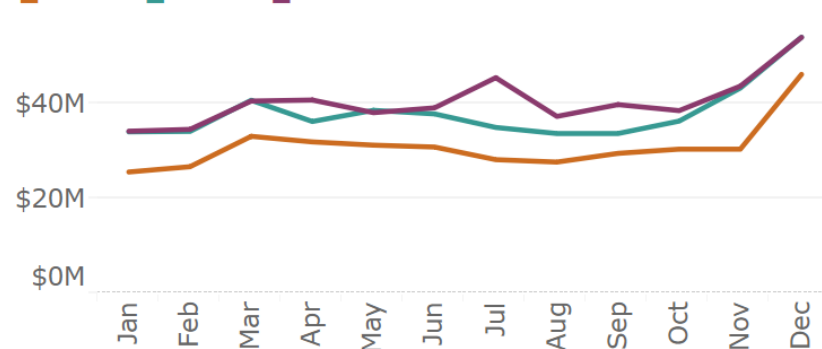
## Hotel/Motel

2021 2022 2023



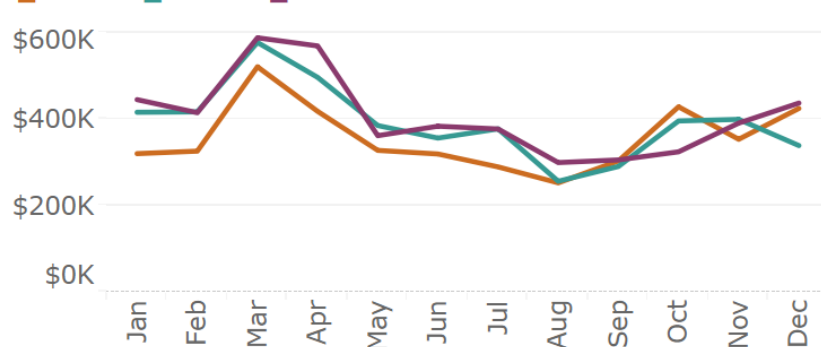
## Retail

2021 2022 2023



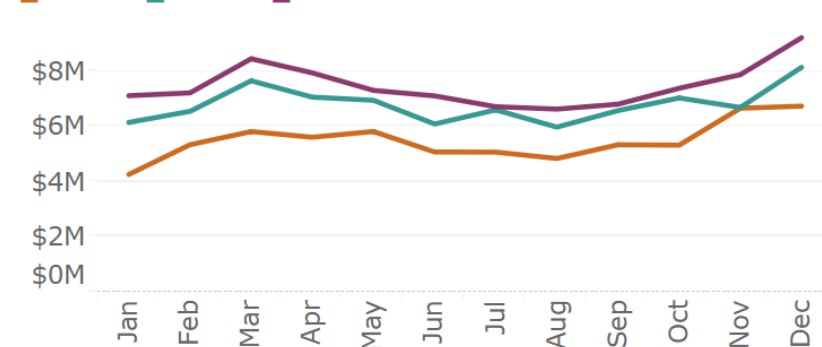
## Amusement

2021 2022 2023



## Restaurant

2021 2022 2023

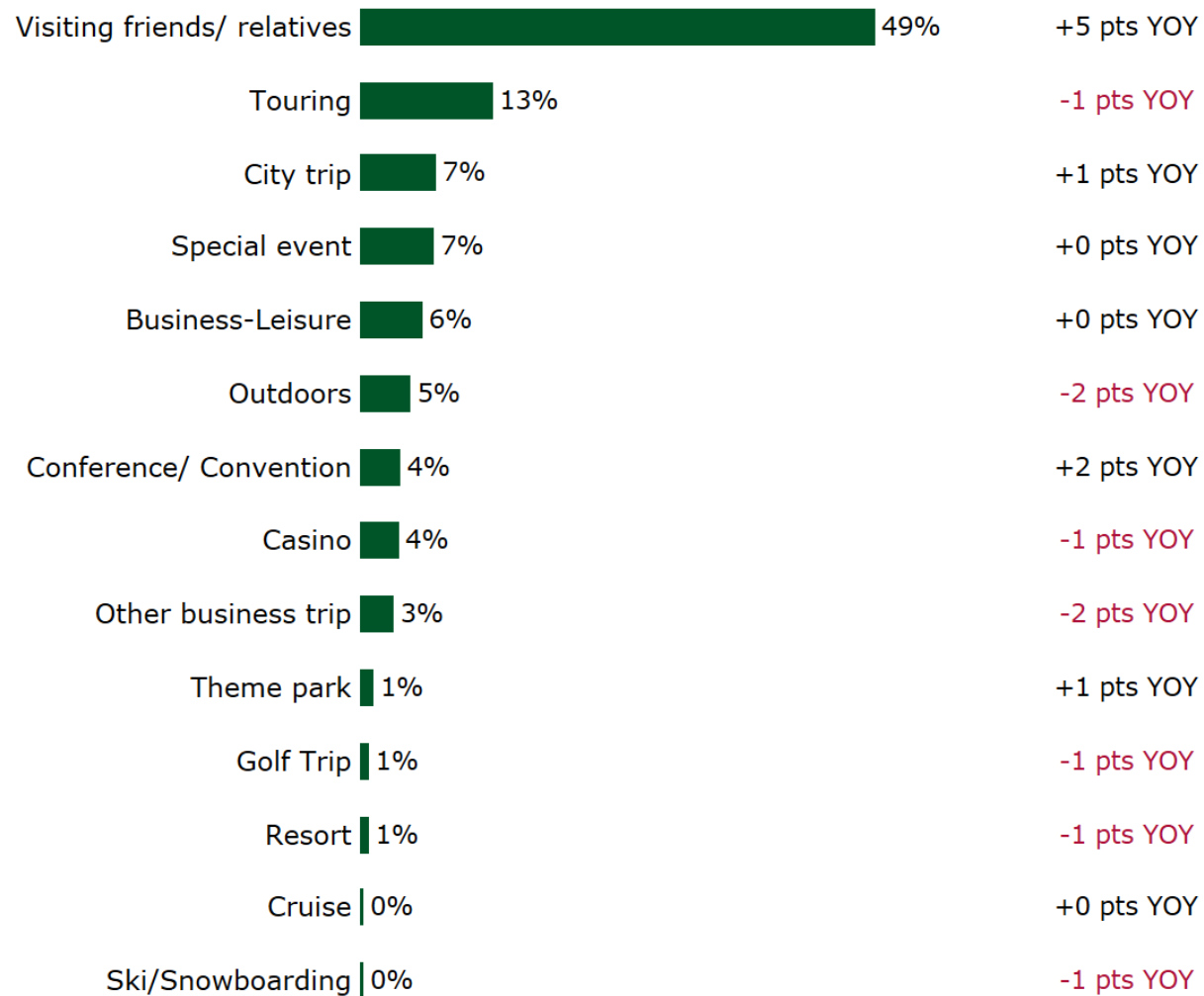


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

# Visitor Summary

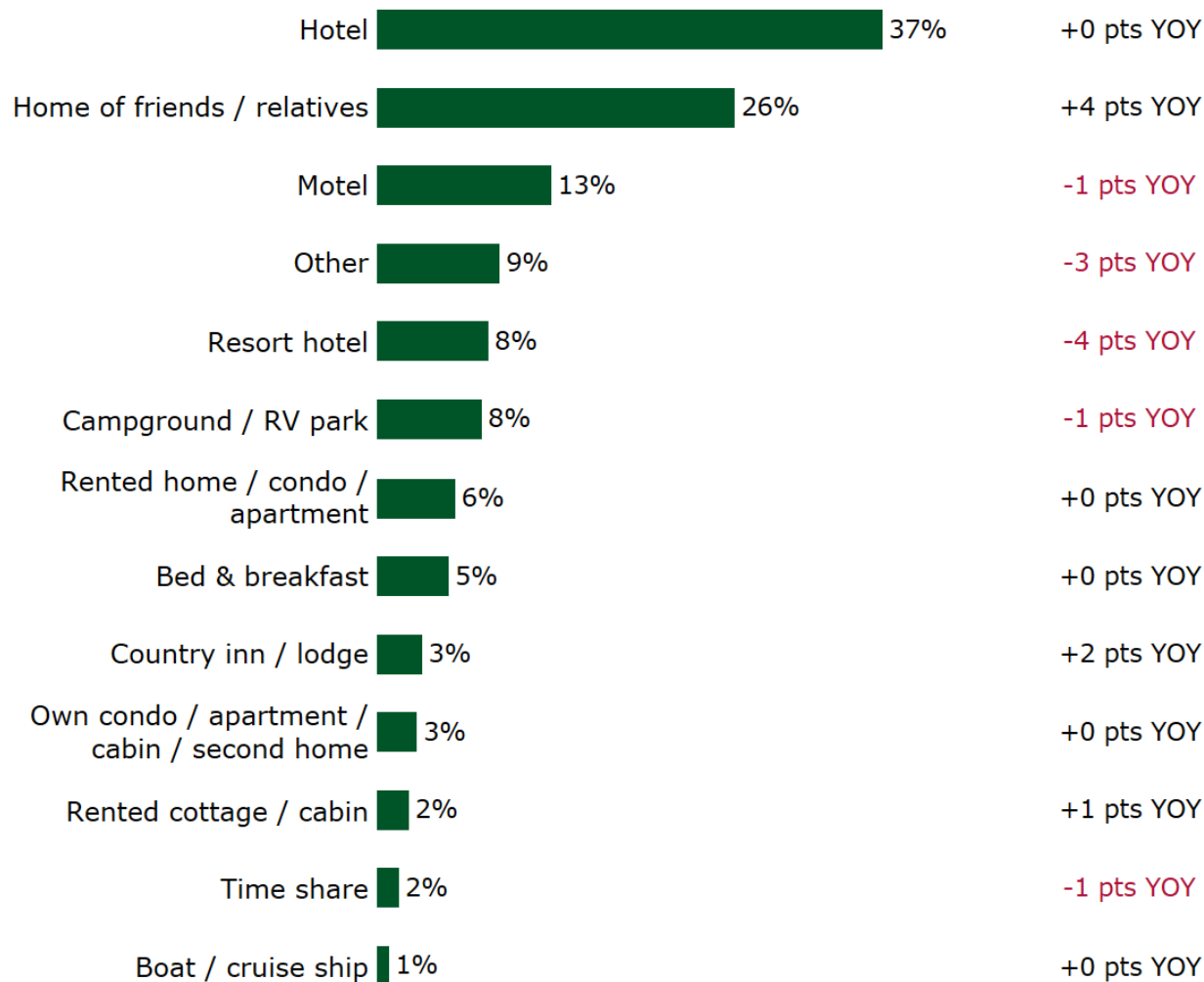


# 2023 Main Purpose of Trip: Tucson & Southern Region



Source: Longwoods

# 2023 Accommodation: Tucson & Southern Region



Source: Longwoods

# 2023 Visitor Summary: Cochise County



79%

Overnight Visitor Share



53%

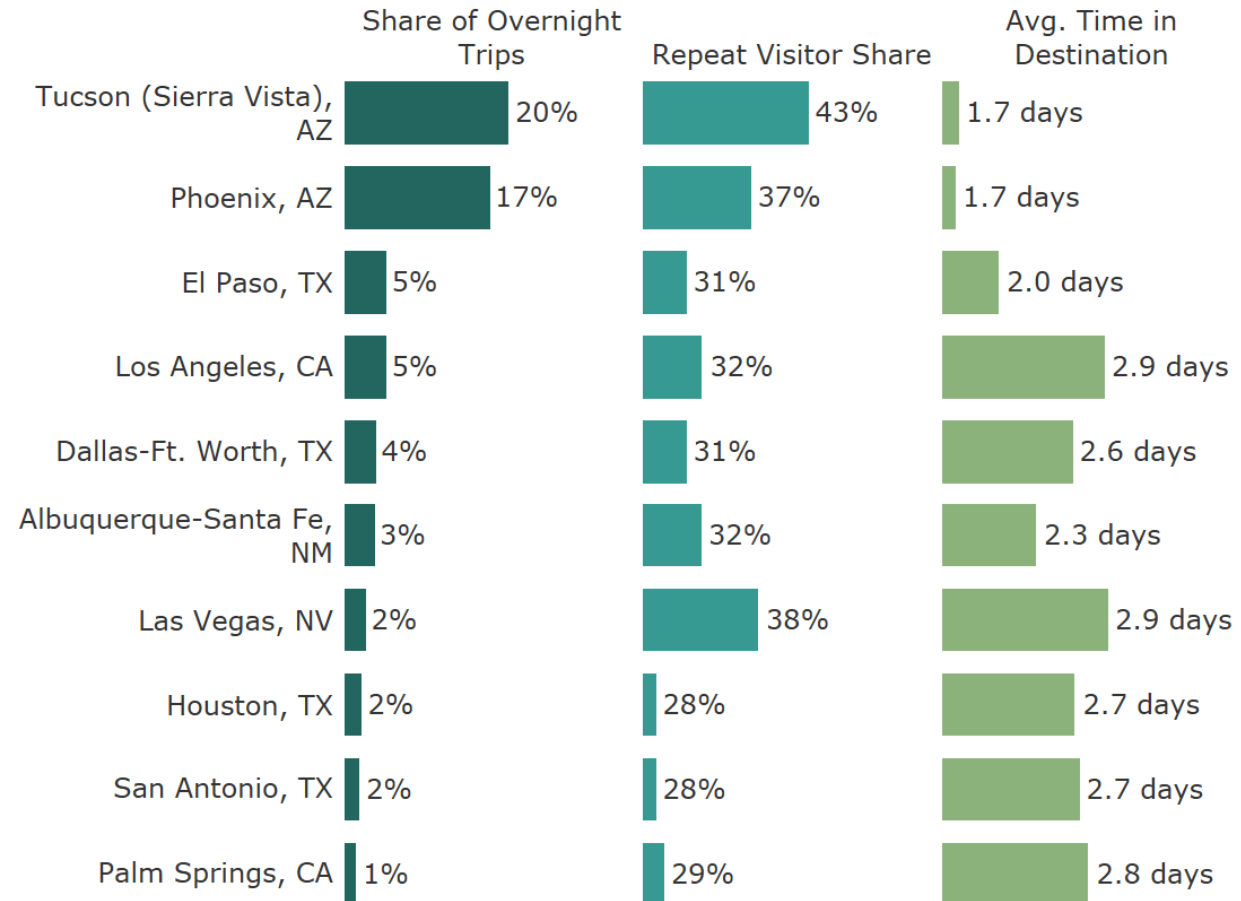
Repeat Visitor Share



2.6 days

Avg. Time in Destination

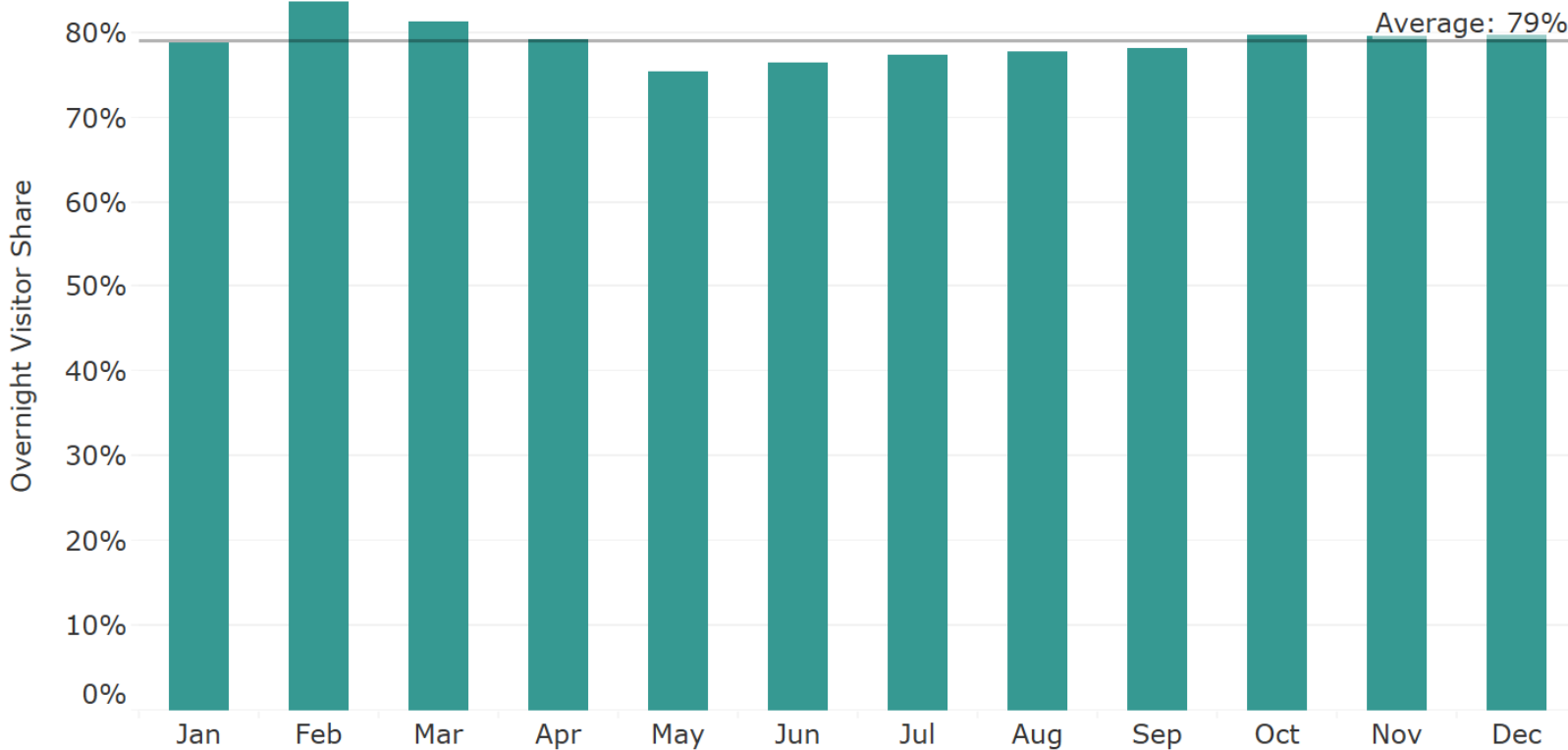
## Top 10 Overnight Visitor Origins



Source: Azira

# Overnight Visitor Share: Cochise County

2023 Overnight Visitor Share Monthly Trend



Source: Azira



# 2023 Visitor Summary: Graham County



77%

Overnight Visitor Share



56%

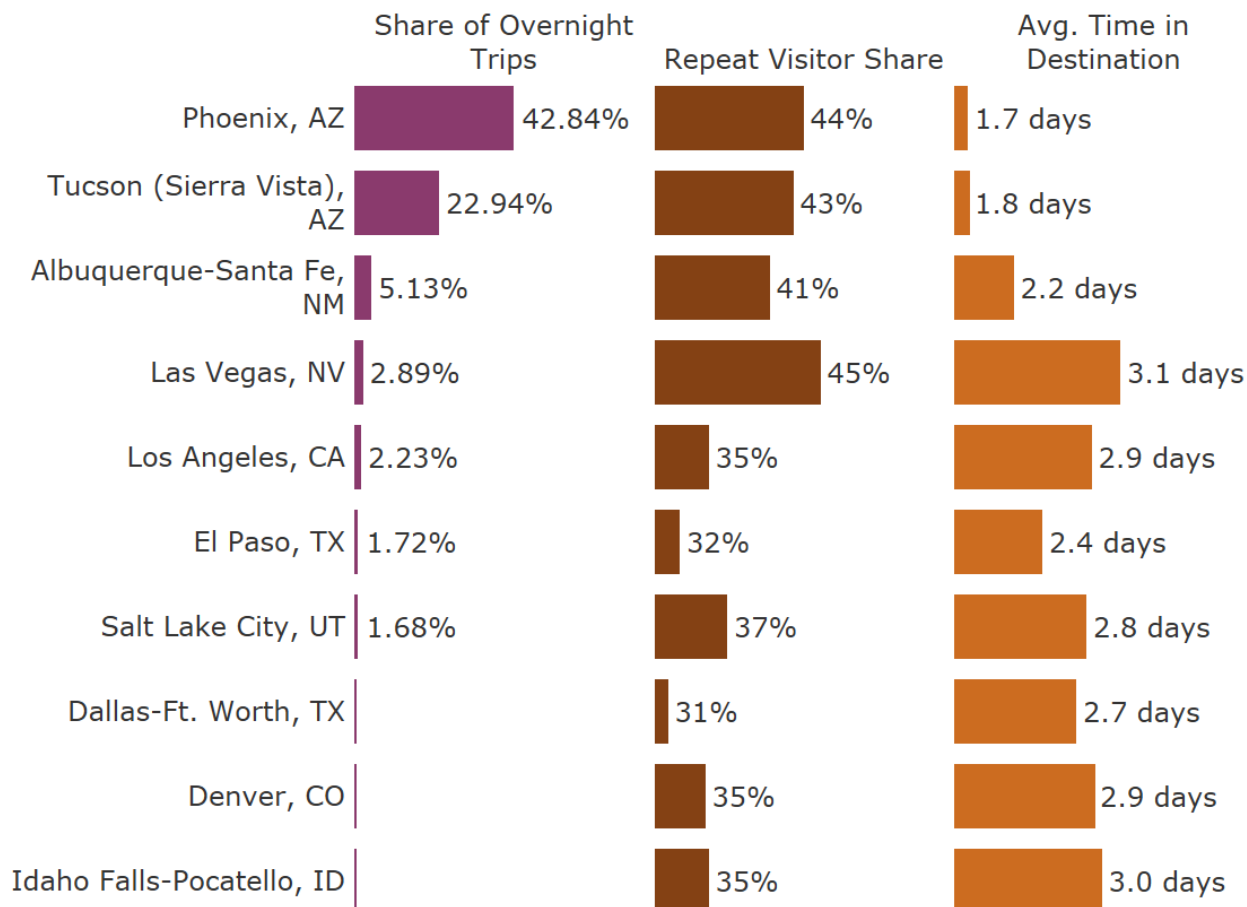
Repeat Visitor Share



1.9 days

Avg. Time in Destination

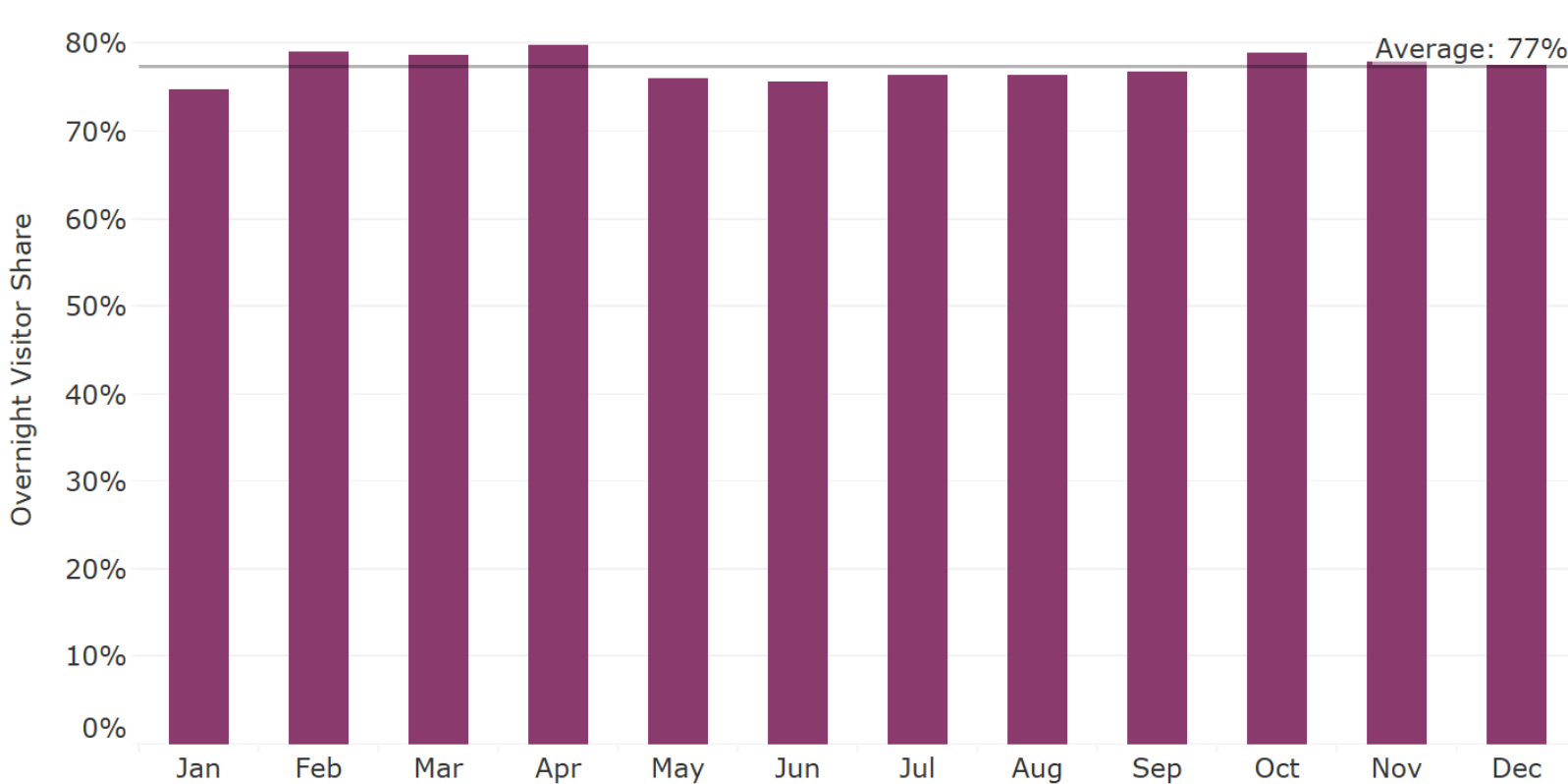
## Top 10 Overnight Visitor Origins



Source: Azira

# Overnight Visitor Share: Graham County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

# 2023 Visitor Summary: Greenlee County



**75%**  
Overnight Visitor Share

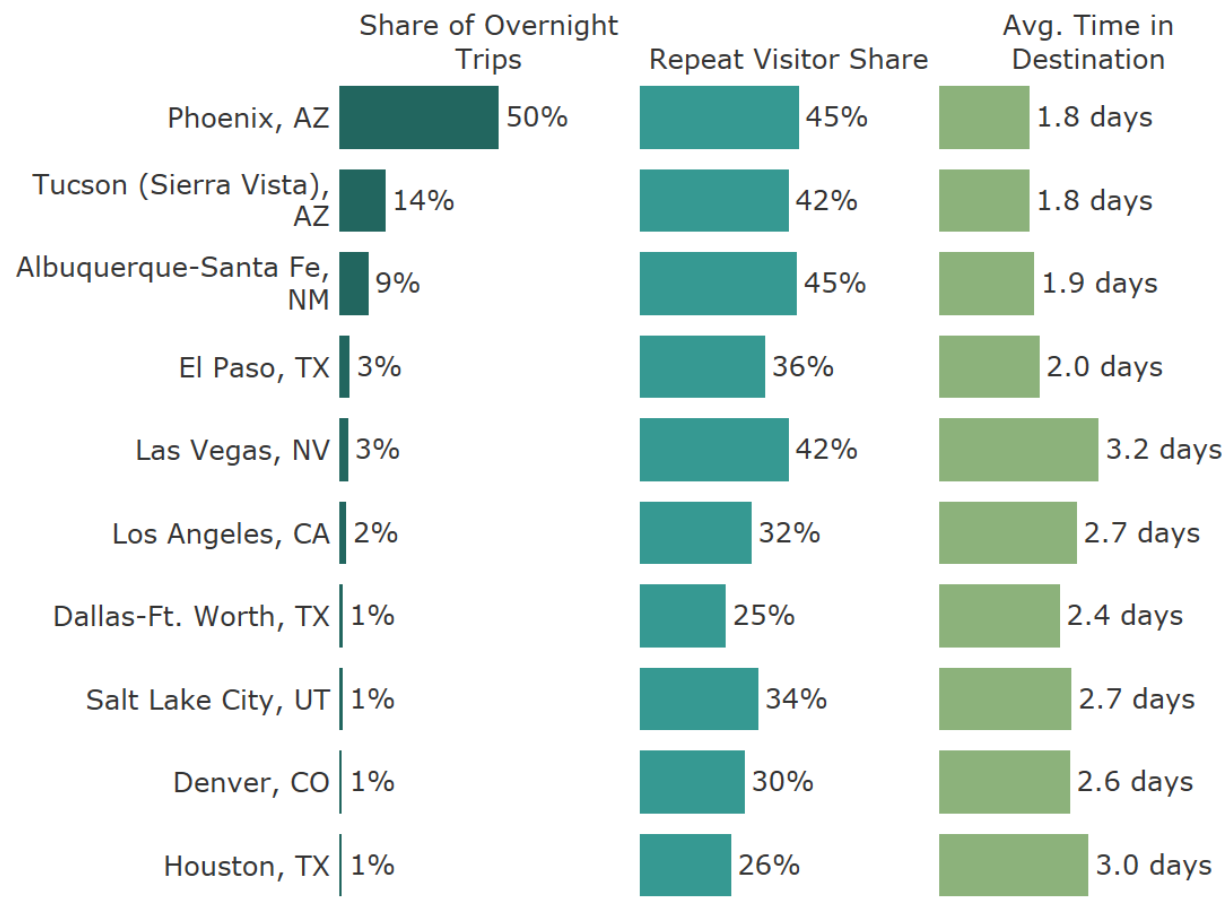


**56%**  
Repeat Visitor Share



**1.8 days**  
Avg. Time in Destination

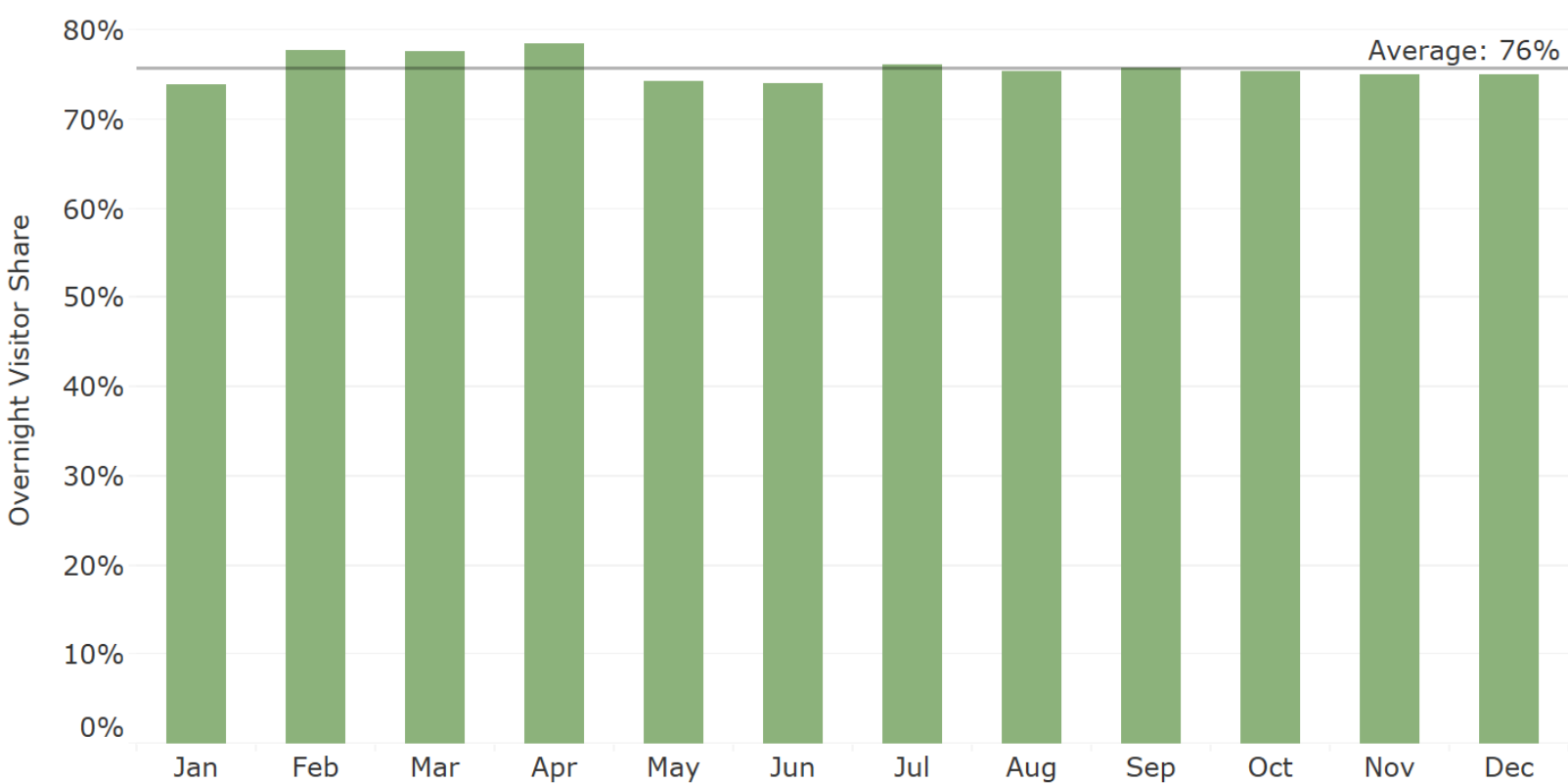
## Top 10 Overnight Visitor Origins



Source: Azira

# Overnight Visitor Share: Greenlee County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

# 2023 Visitor Summary: Pima County



82%

Overnight Visitor Share



59%

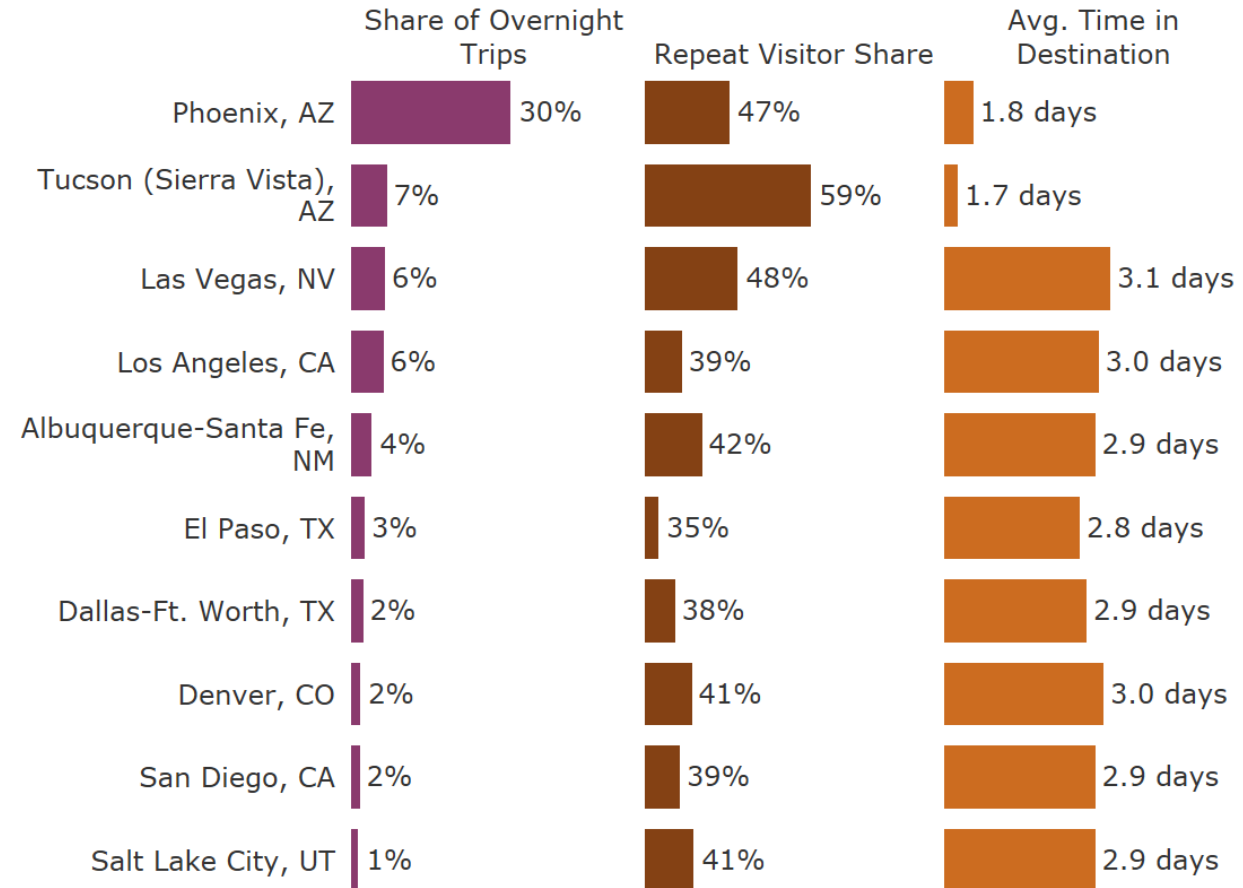
Repeat Visitor Share



2.9 days

Avg. Time in Destination

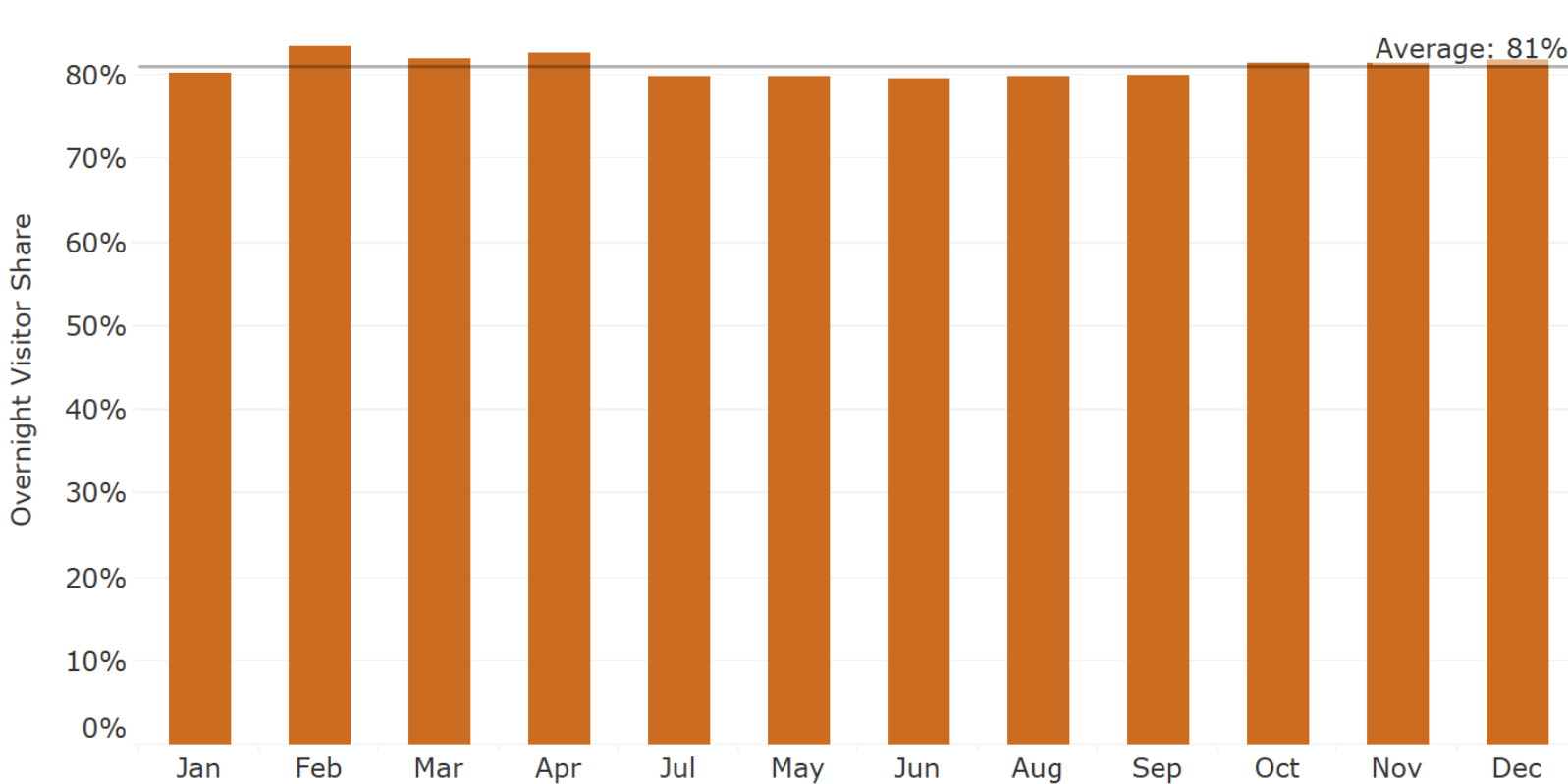
## Top 10 Overnight Visitor Origins



Source: Azira

# Overnight Visitor Share: Pima County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

# 2023 Visitor Summary: Santa Cruz County



**71%**  
Overnight Visitor Share

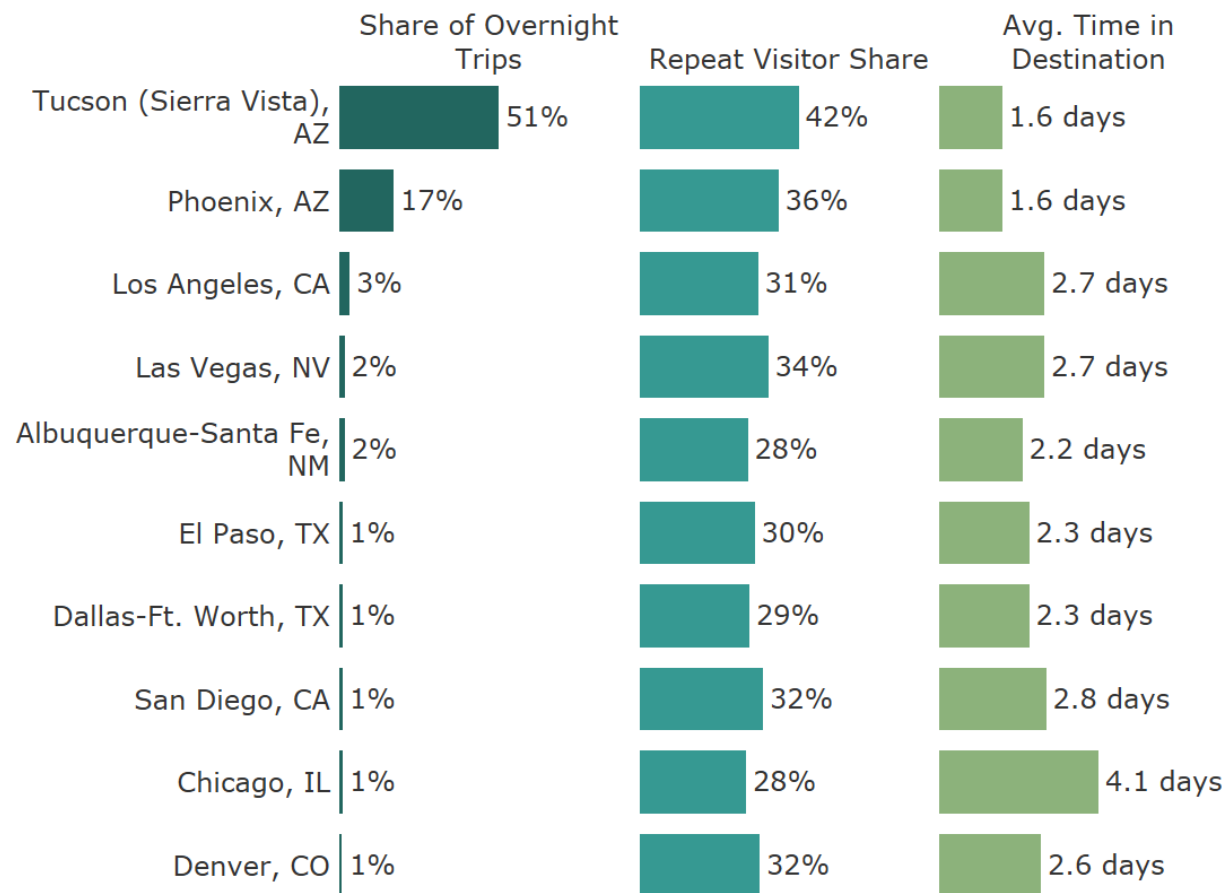


**53%**  
Repeat Visitor Share



**1.7 days**  
Avg. Time in Destination

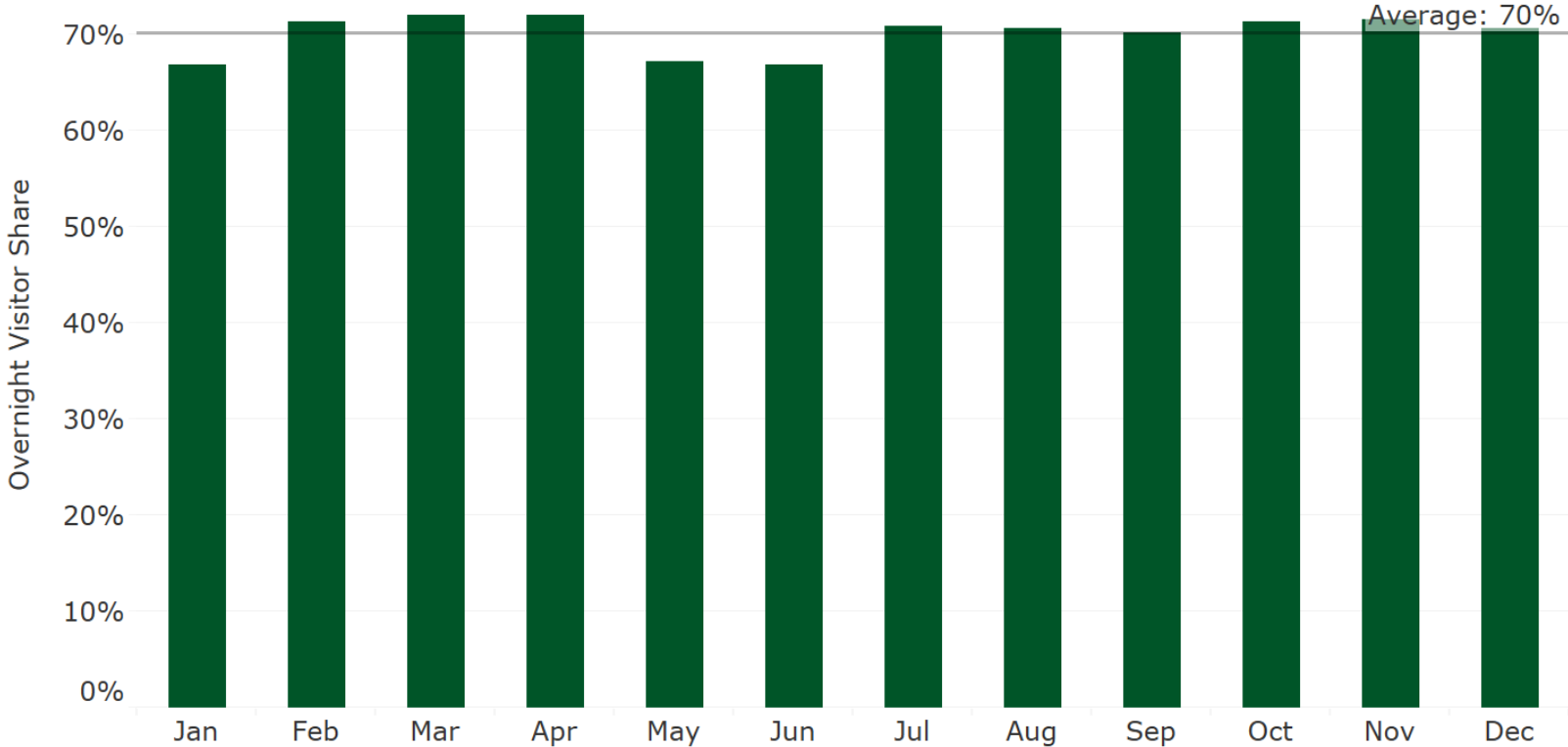
## Top 10 Overnight Visitor Origins



Source: Azira

# Overnight Visitor Share: Santa Cruz County

2023 Overnight Visitor Share Monthly Trend



Source: Azira