

WEST COAST REGION

TRAVEL RESEARCH TRENDS



Arizona Travel Impact



State Domestic Travel Impact



2023 Total Overnight Visitors

41M

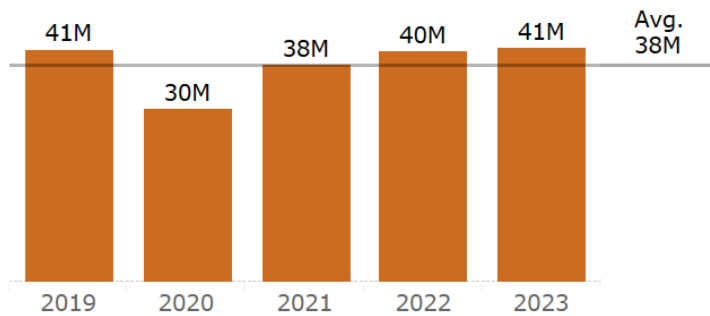
+2% YOY | +1% vs. 2019



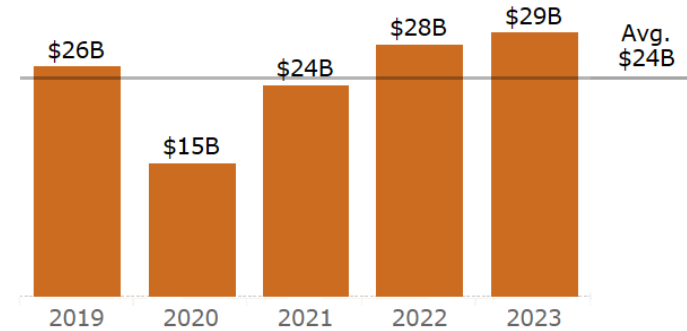
2023 Total Spending

\$29B

+5% YOY | +15% vs. 2019

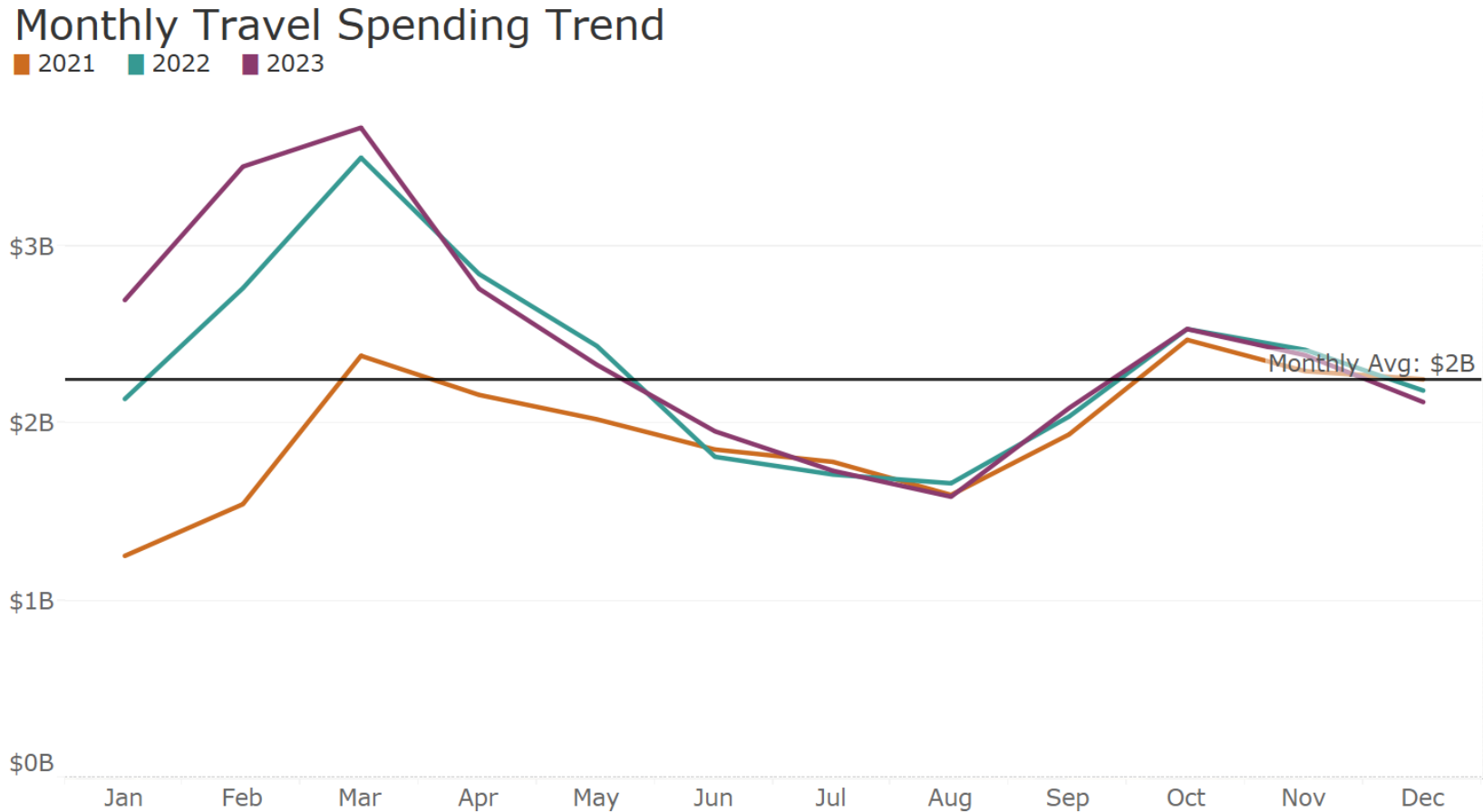


Source: Tourism Economics



Source: Dean Runyan Associates

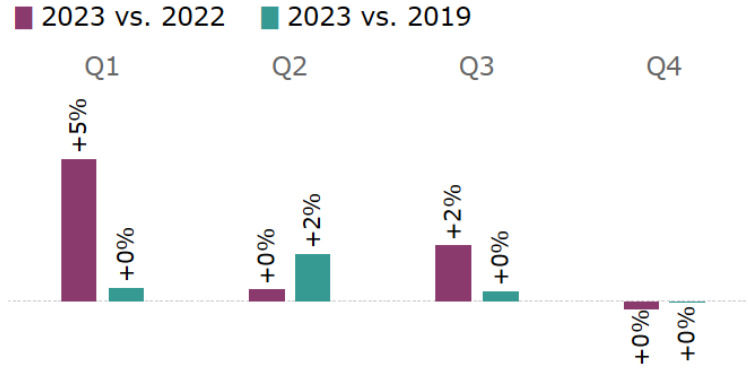
State Domestic Travel Impact



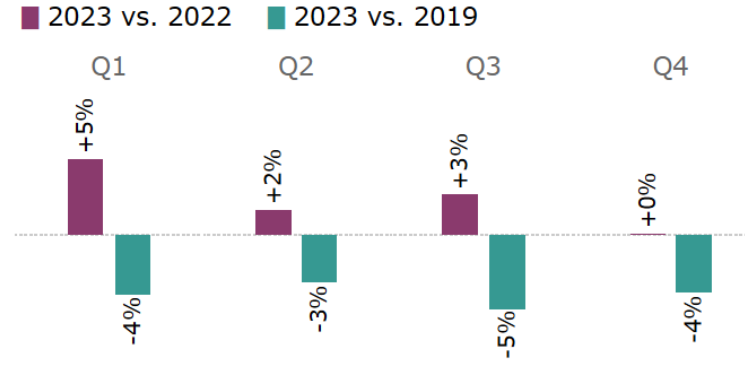
Source: Dean Runyan Associates

State Domestic Travel Impact

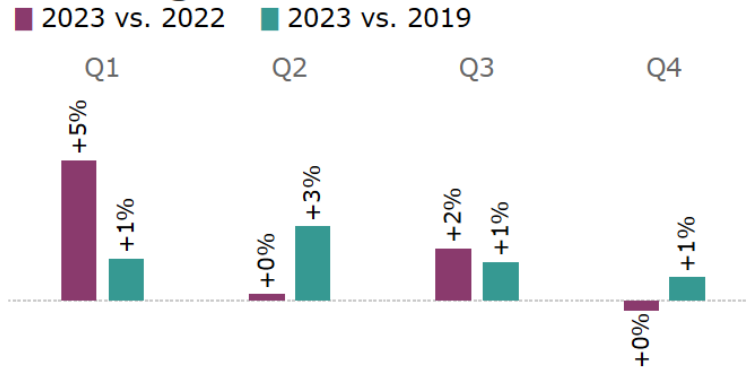
All Overnight Visitors



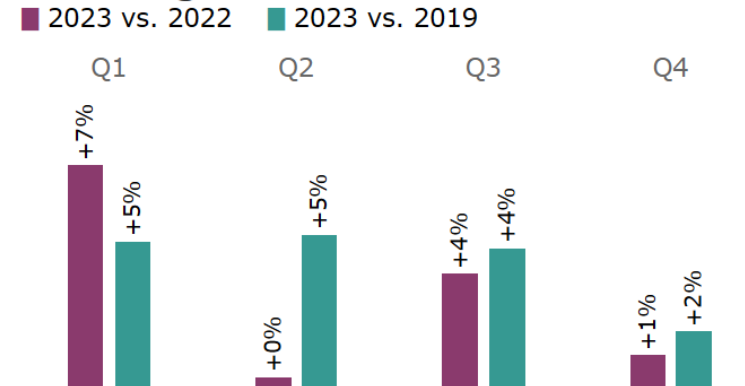
Overnight Business Visitors



Overnight Leisure Visitors

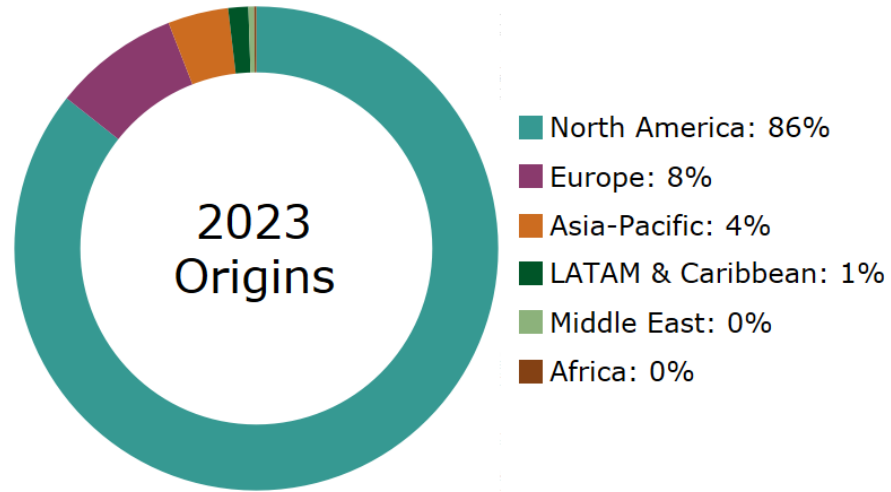


Overnight Resident Visitors

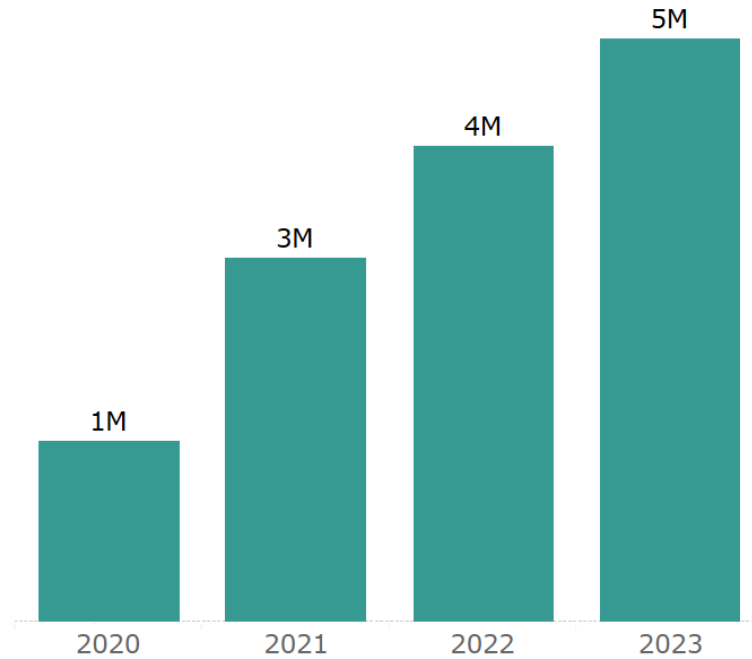


Source: Tourism Economics

State International Travel Impact



Annual International Overnight Visits
Last 4 years



Source: Tourism Economics International State Travel

Travel Impact by County



2023 Total Spending: West Coast Region

Mohave
\$827M
-1% YOY

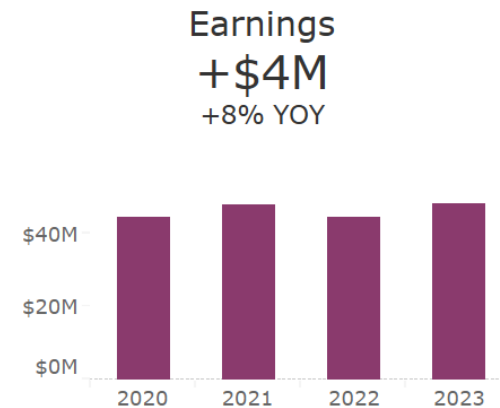
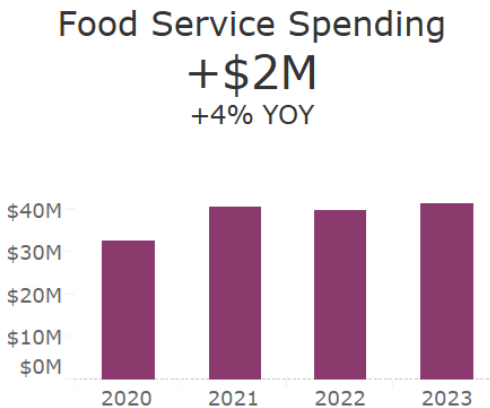
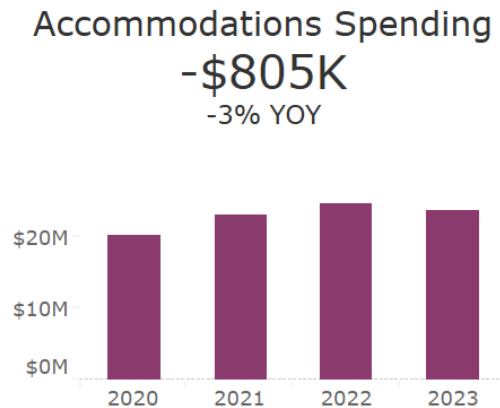
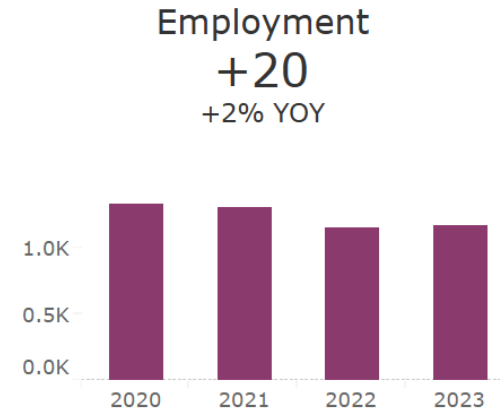
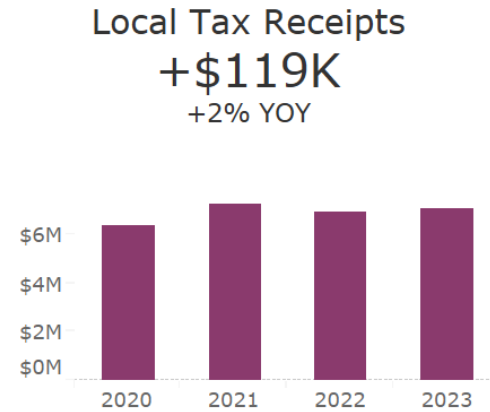
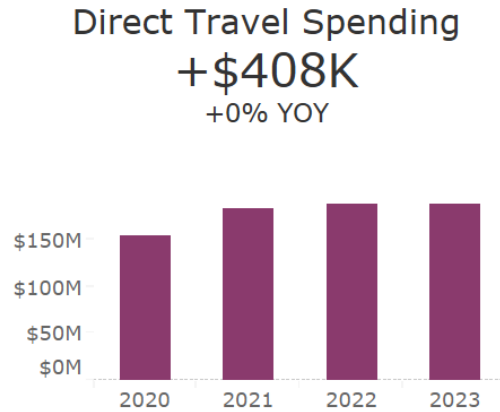
La Paz
\$188M
+0% YOY

Yuma
\$754M
+1% YOY



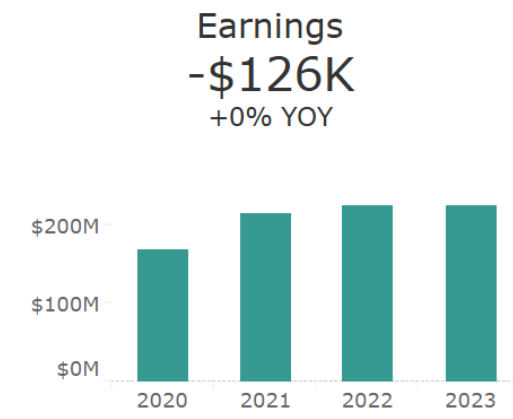
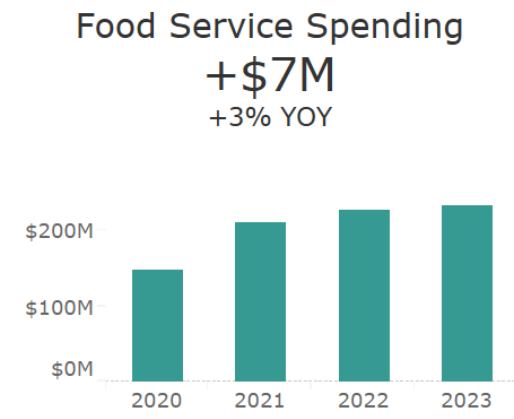
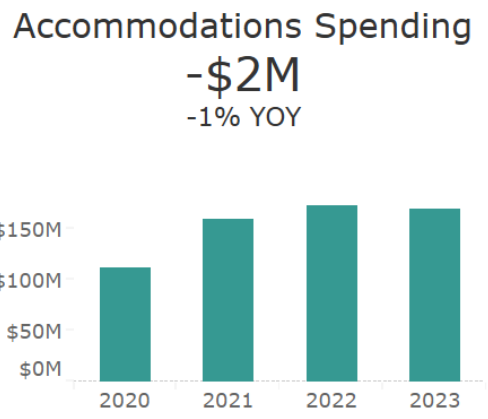
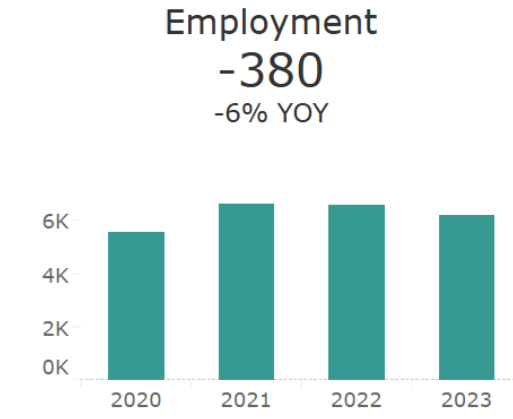
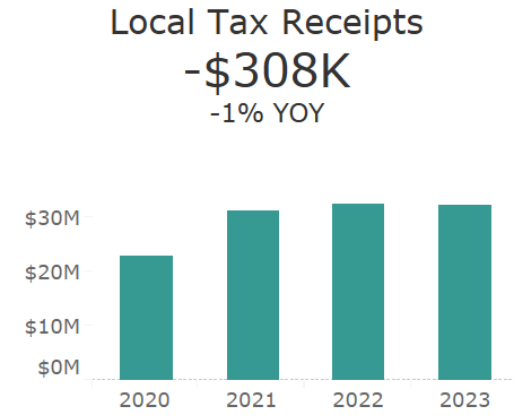
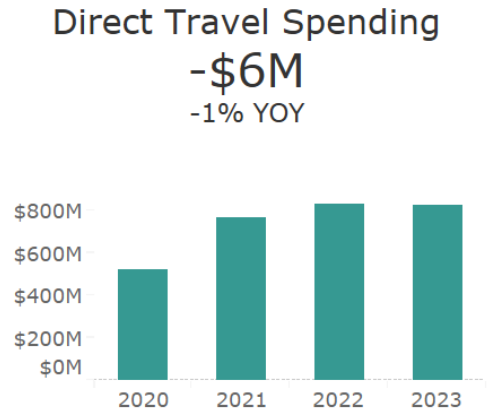
Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: La Paz County



Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Mohave County

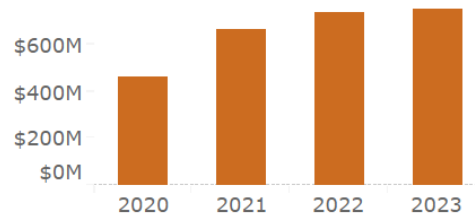


Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Yuma County

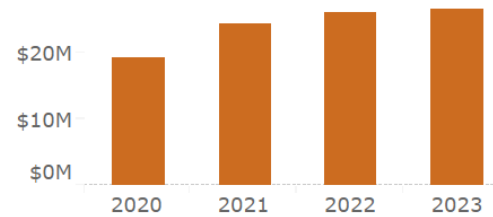
Direct Travel Spending

+\$11M
+1% YOY



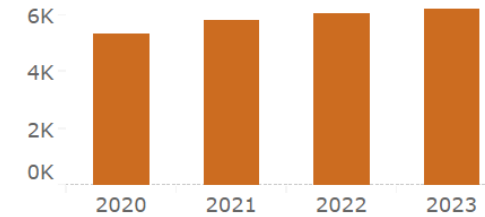
Local Tax Receipts

+\$432K
+2% YOY



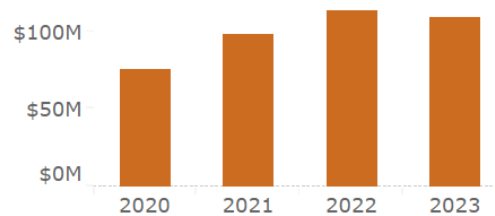
Employment

+140
+2% YOY



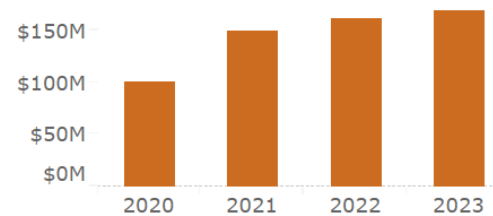
Accommodations Spending

-\$4M
-3% YOY



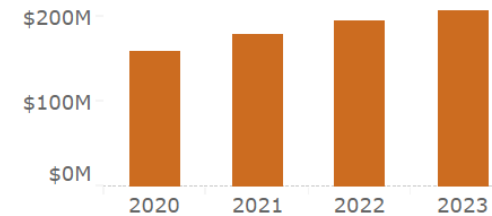
Food Service Spending

+\$8M
+5% YOY



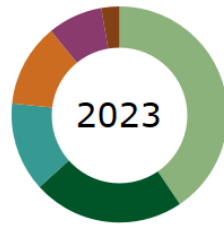
Earnings

+\$11M
+5% YOY

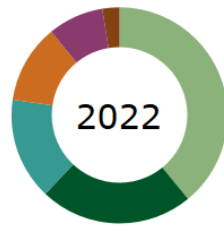


Source: Arizona Travel Impacts, Dean Runyan Associates

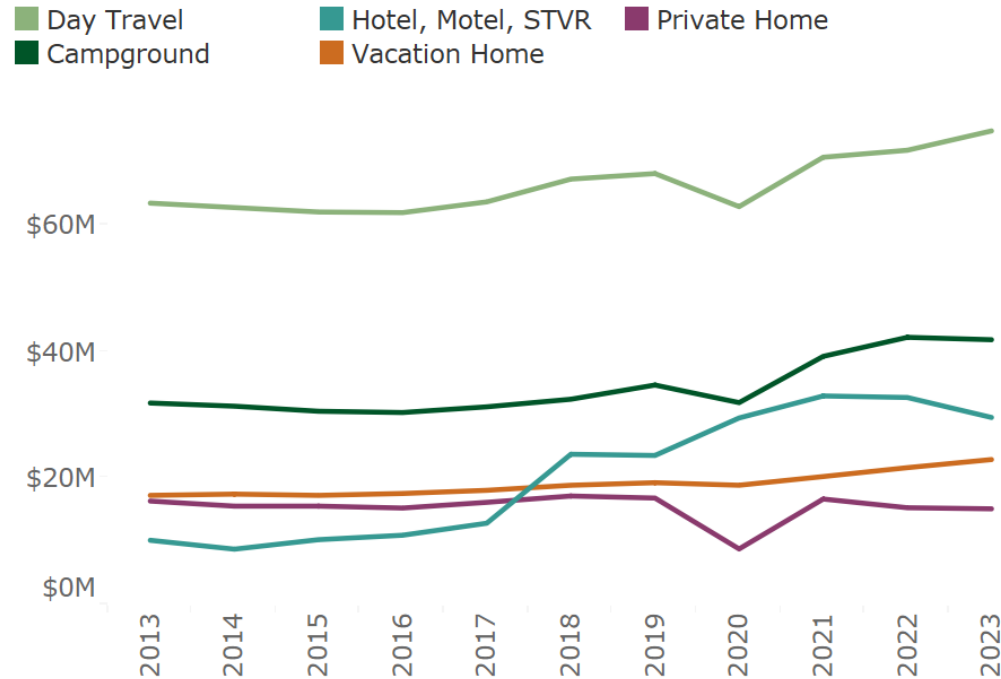
Spend by Accommodation Type: La Paz County



- Day Travel: 41%
- Campground: 23%
- Hotel, Motel: 13%
- Vacation Home: 12%
- Private Home: 8%
- STVR: 3%



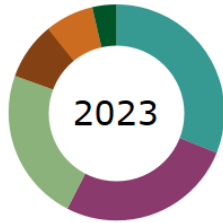
- Day Travel: 39%
- Campground: 23%
- Hotel, Motel: 15%
- Vacation Home: 12%
- Private Home: 8%
- STVR: 3%



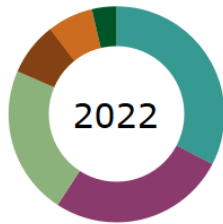
Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

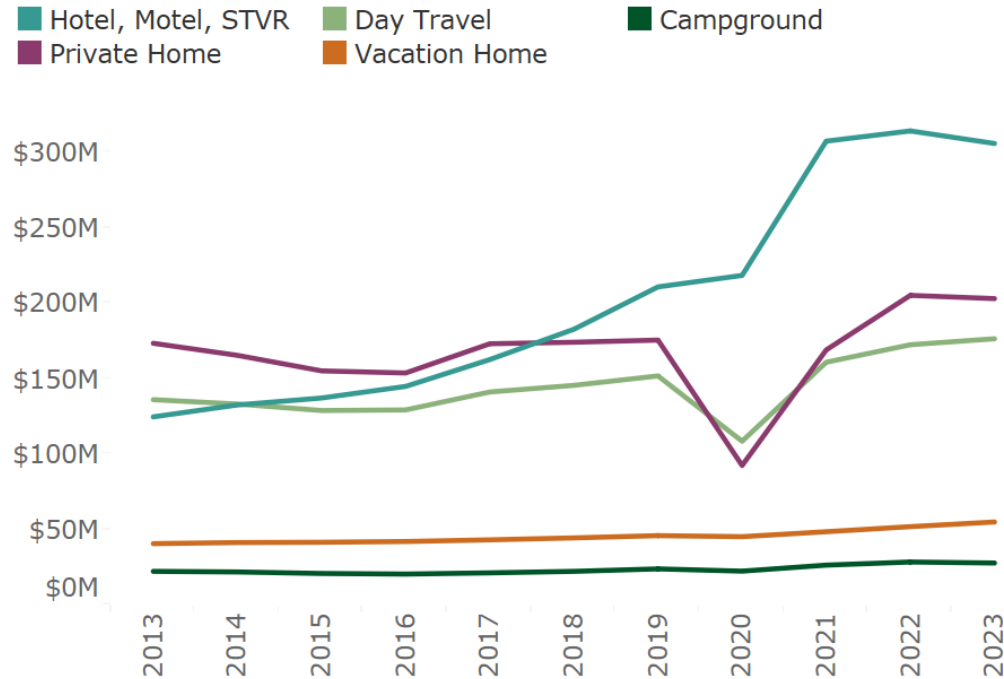
Spend by Accommodation Type: Mohave County



- Hotel, Motel: 31%
- Private Home: 26%
- Day Travel: 23%
- STVR: 9%
- Vacation Home: 7%
- Campground: 4%



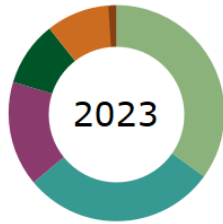
- Hotel, Motel: 33%
- Private Home: 27%
- Day Travel: 22%
- STVR: 8%
- Vacation Home: 7%
- Campground: 4%



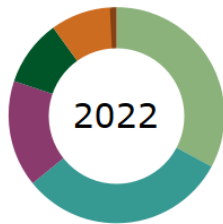
Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

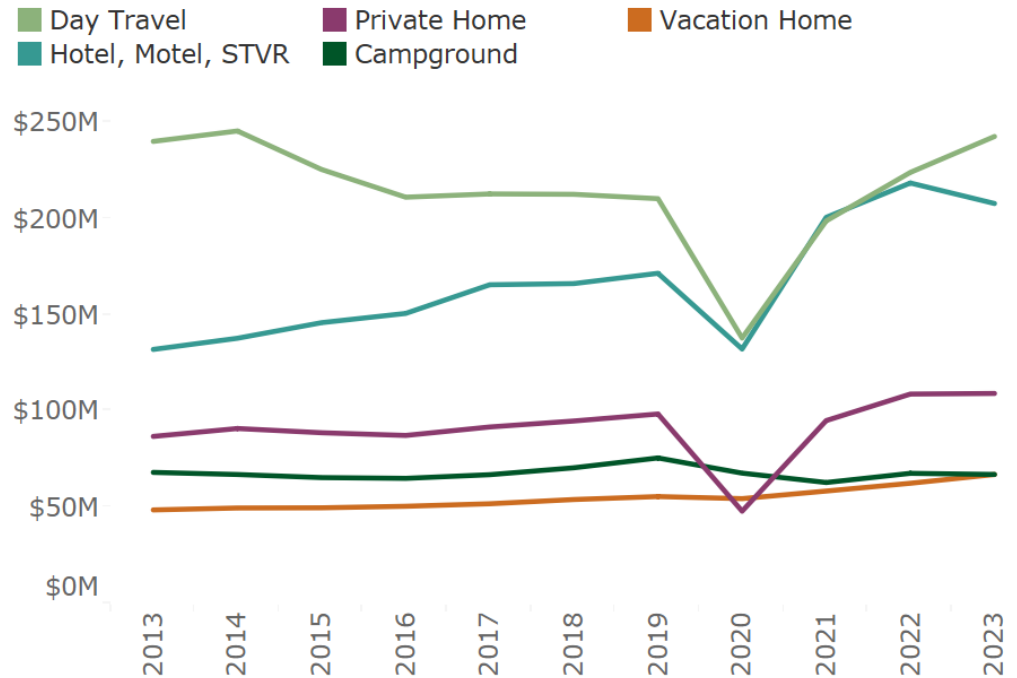
Spend by Accommodation Type: Yuma County



- Day Travel: 35%
- Hotel, Motel, STVR: 29%
- Private Home: 16%
- Campground: 10%
- Vacation Home: 10%
- STVR: 1%



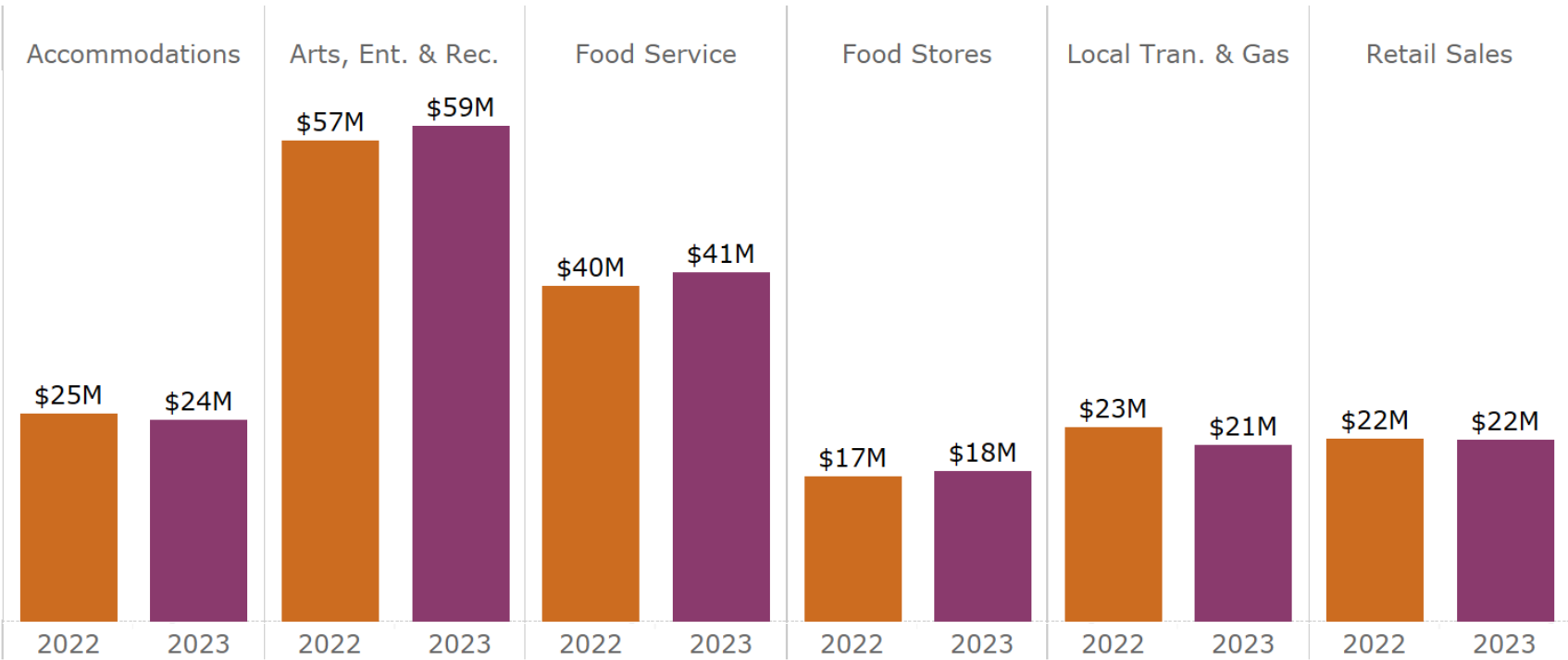
- Day Travel: 33%
- Hotel, Motel: 31%
- Private Home: 16%
- Campground: 10%
- Vacation Home: 9%
- STVR: 1%



Source: Arizona Travel Impacts, Dean Runyan Associates

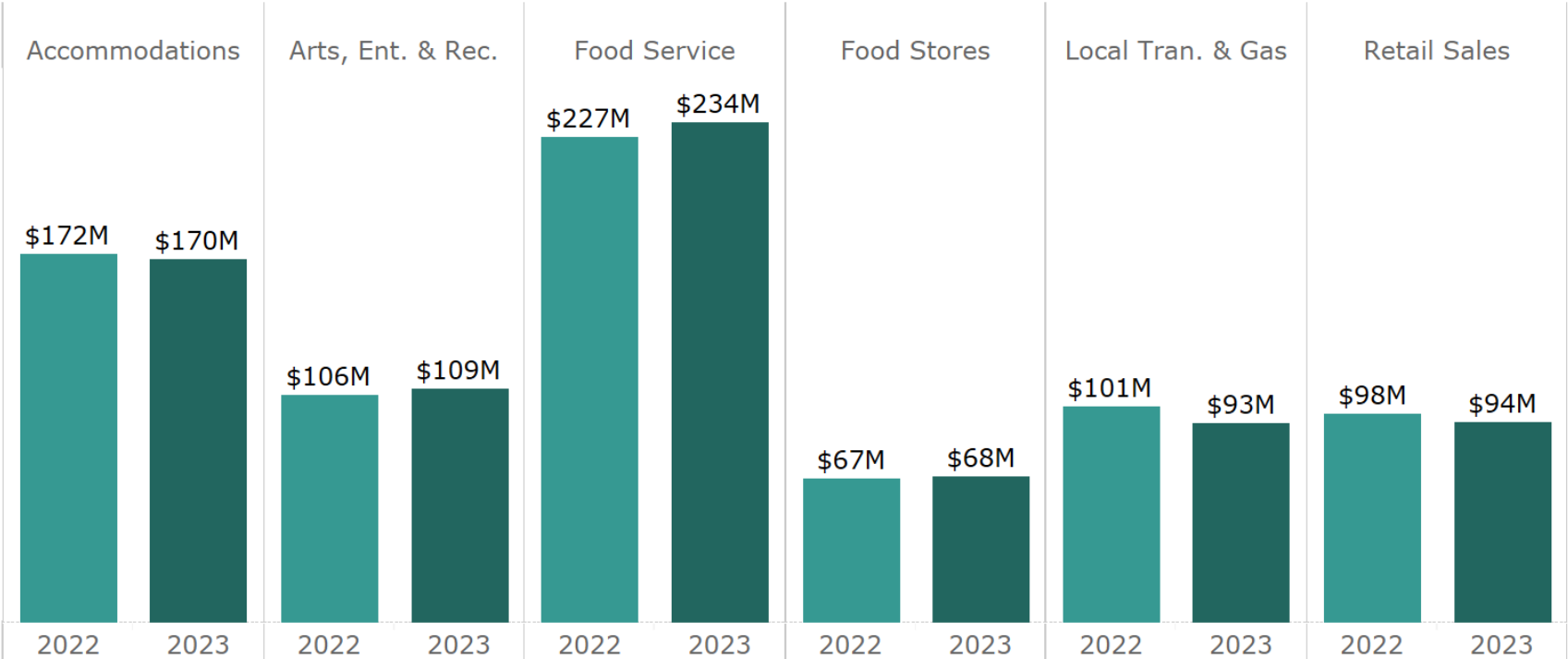
* STVR stands for Short-Term Vacation Rental

Spend by Commodity: La Paz County



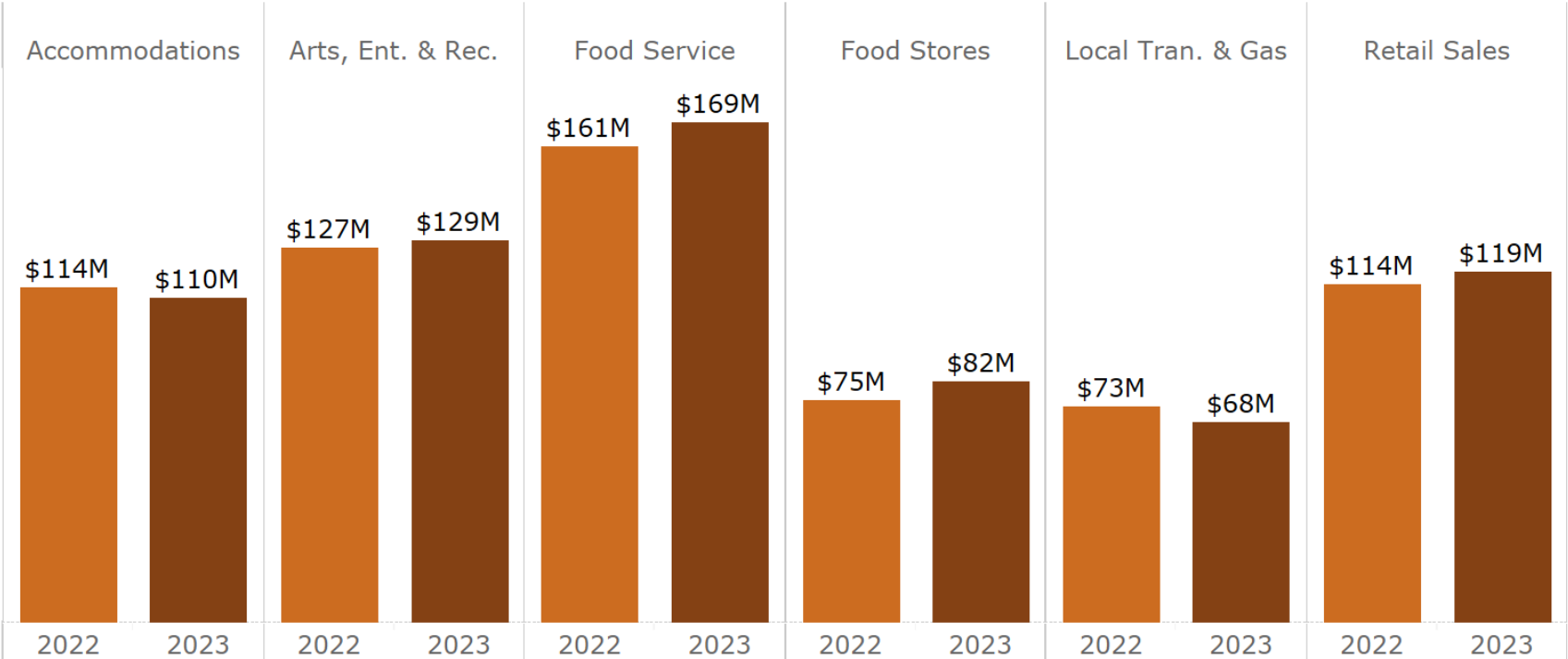
Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Mohave County



Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Yuma County



Source: Arizona Travel Impacts, Dean Runyan Associates

Lodging Performance



Short-Term Rentals: West Coast Region

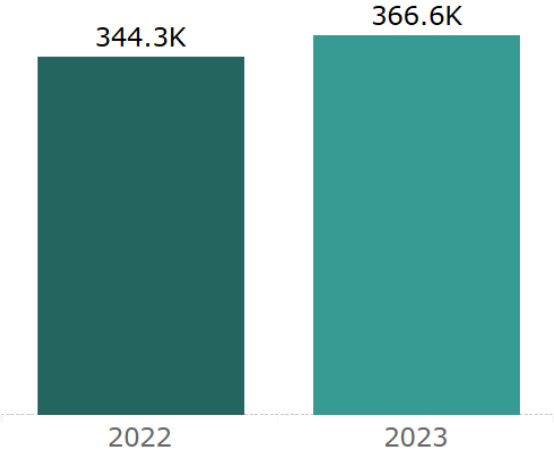
Year-to-Date Supply

Jan - Dec All Properties Available



Year-to-Date Demand

Jan - Dec Nights Sold at All Properties



Source: AirDNA

Airport Passenger Traffic

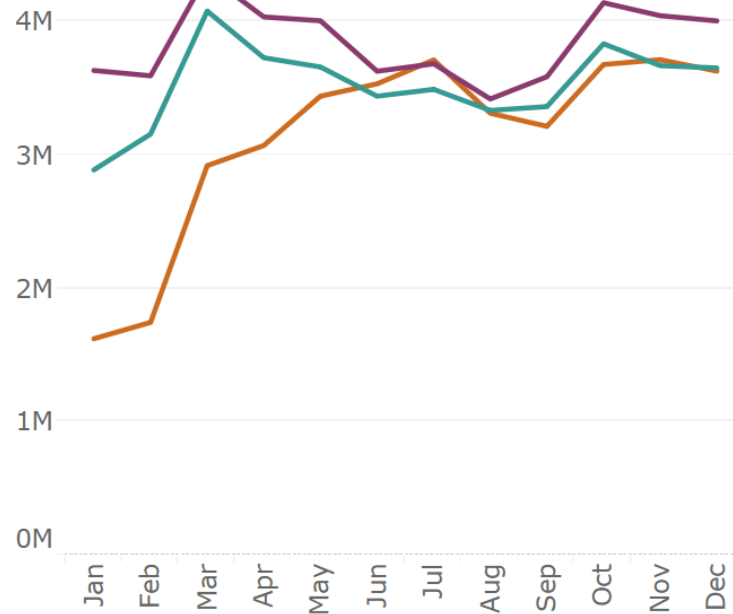


Airport Passengers: West Coast Region

Airport Hub

2021 2022 2023

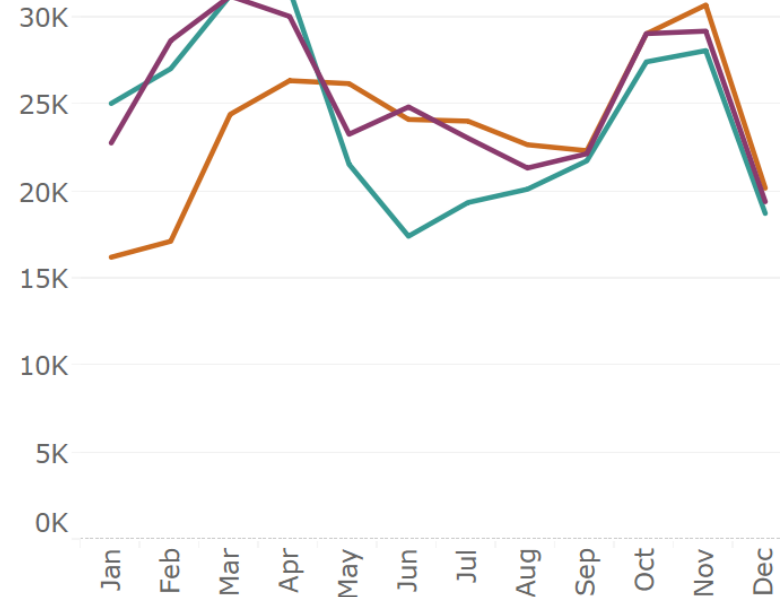
Phoenix Sky Harbor - Domestic



Region Airports

2021 2022 2023

West Coast Region Airports



Kingman, Laughlin/Bullhead City International, & Yuma International

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

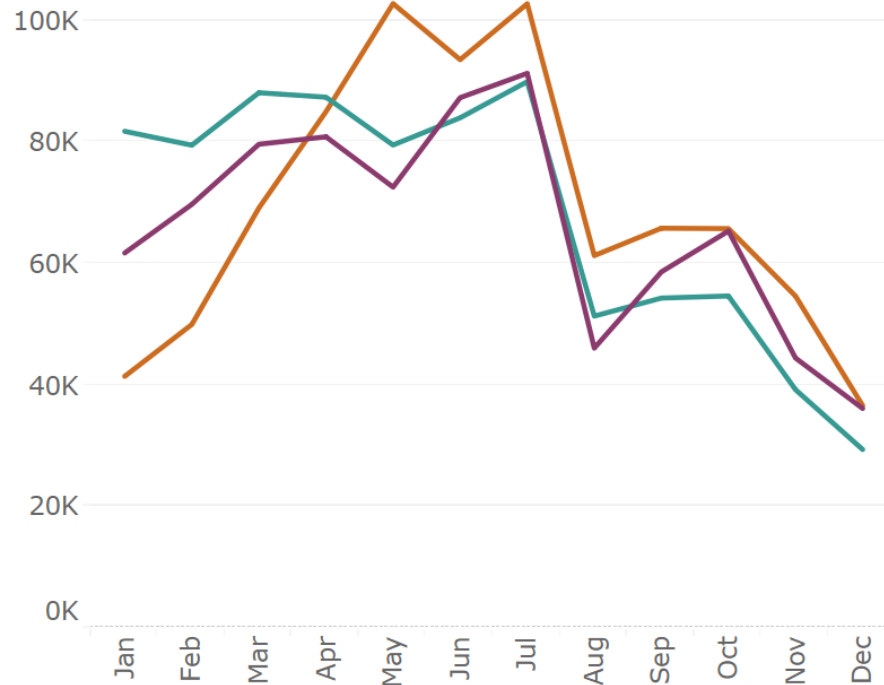
National & State Parks



State Parks: West Coast Region

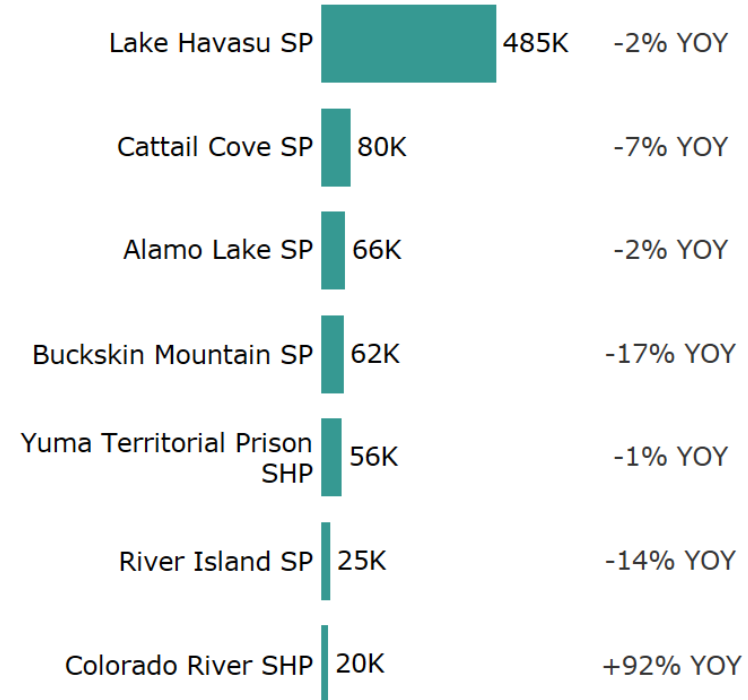
State Parks Visitation Monthly Trend

2021 2022 2023



Year-to-Date Park Visitation

Jan - Dec 2023 Visits & YOY % Change

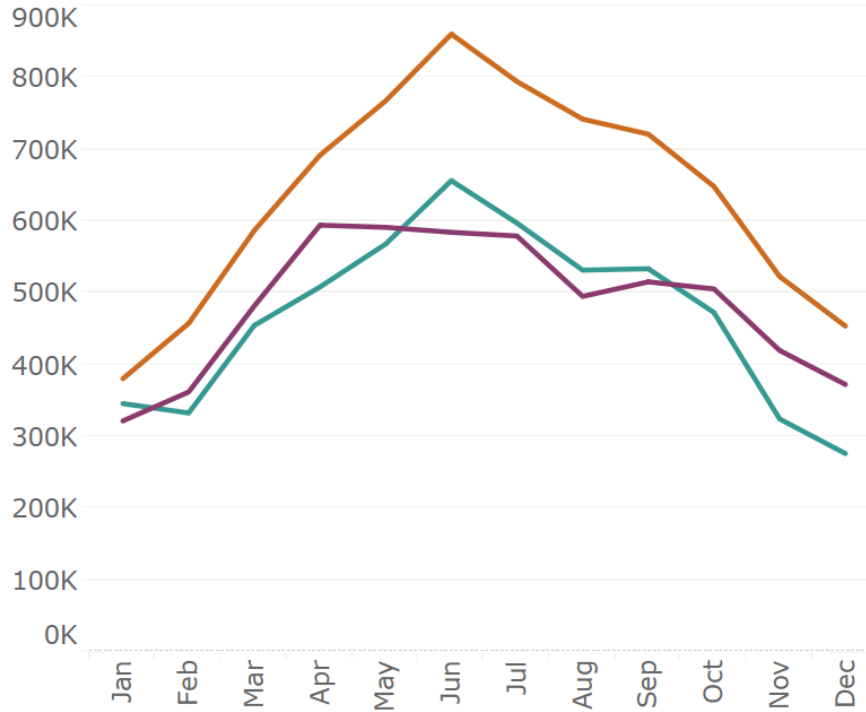


Source: Northern Arizona University, Arizona State Parks

National Parks: West Coast Region

National Parks Visitation Monthly Trend

2021 2022 2023



Year-to-Date Park Visitation

Jan - Dec 2023 Visits & YOY % Change

Lake Mead NRA
6M
+4% YOY

Pipe Spring NM
24K
+4% YOY

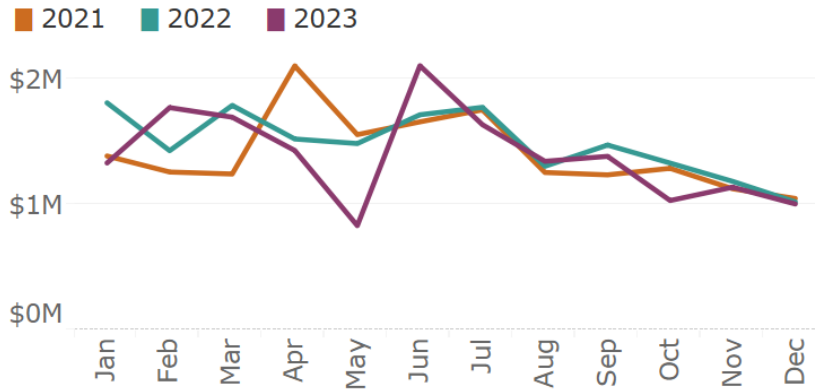
Source: Northern Arizona University, National Park Service

Gross Sales

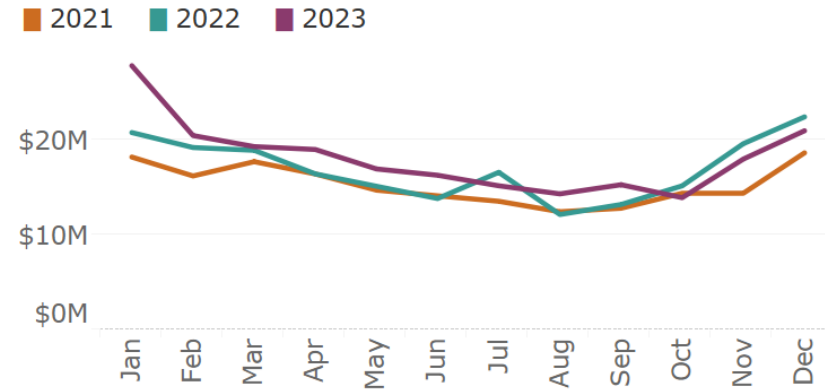


Gross Sales: La Paz County

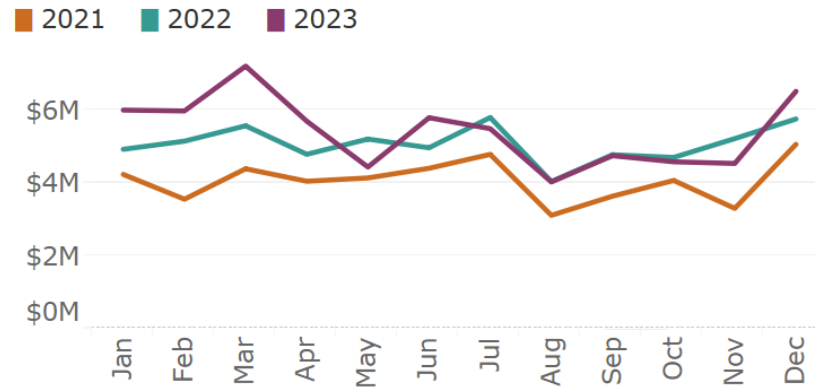
Hotel/Motel



Retail



Restaurant

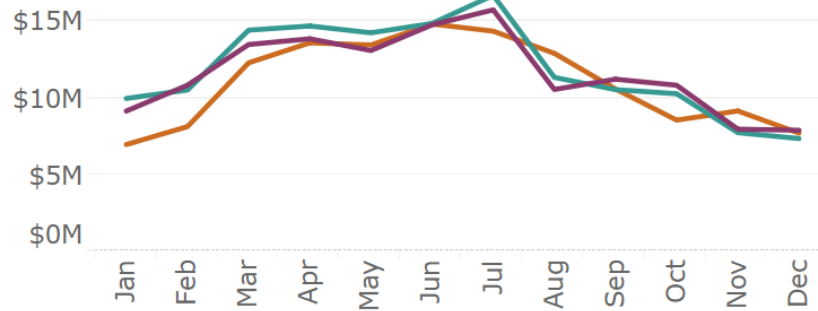


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Mohave County

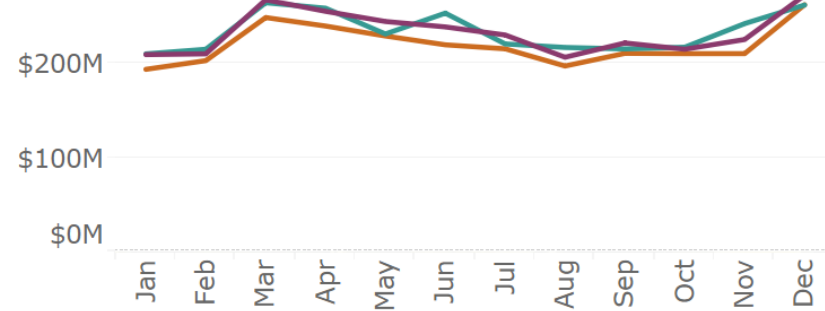
Hotel/Motel

2021 2022 2023



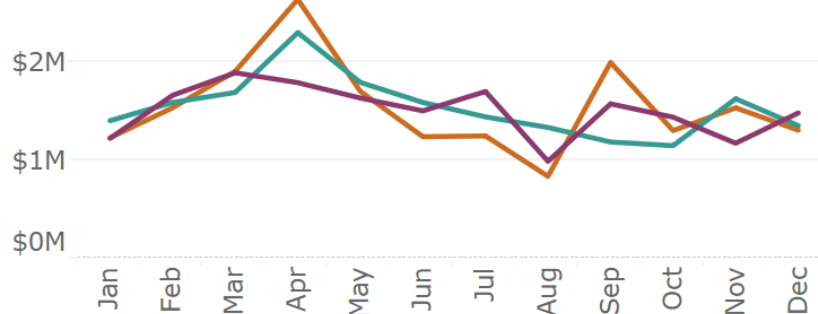
Retail

2021 2022 2023



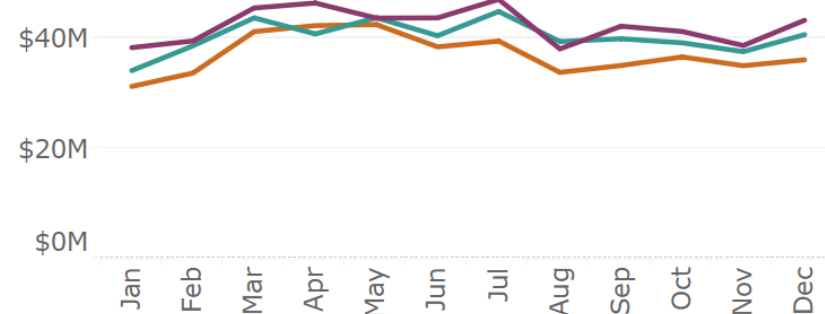
Amusement

2021 2022 2023



Restaurant

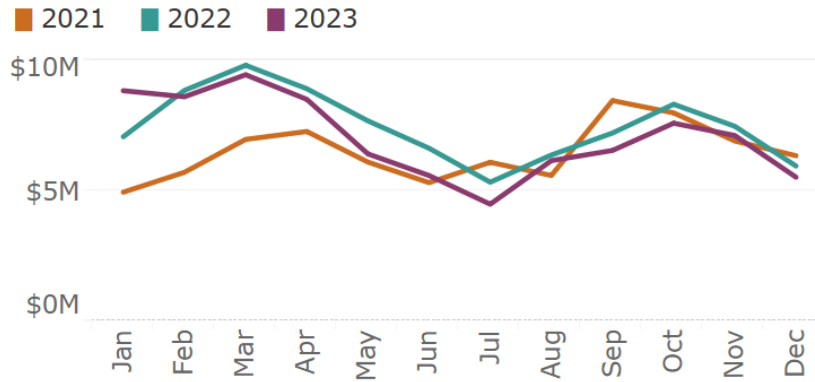
2021 2022 2023



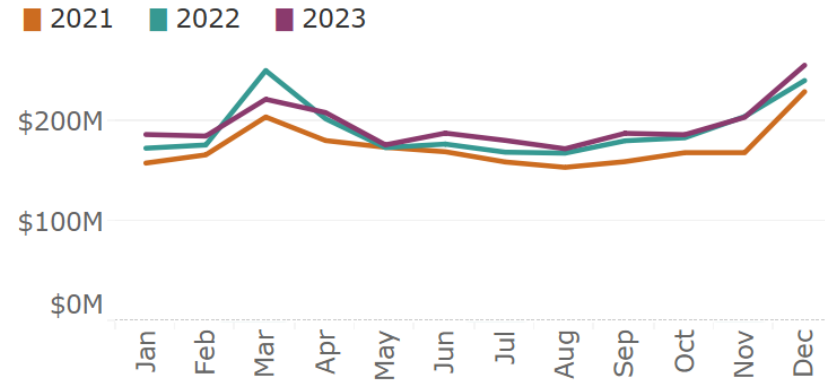
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Yuma County

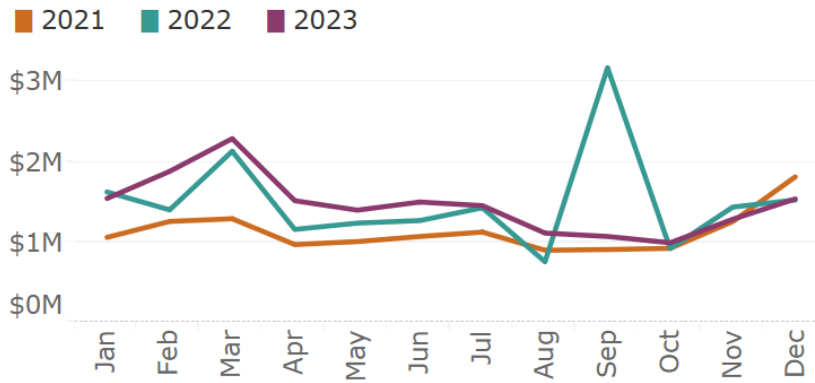
Hotel/Motel



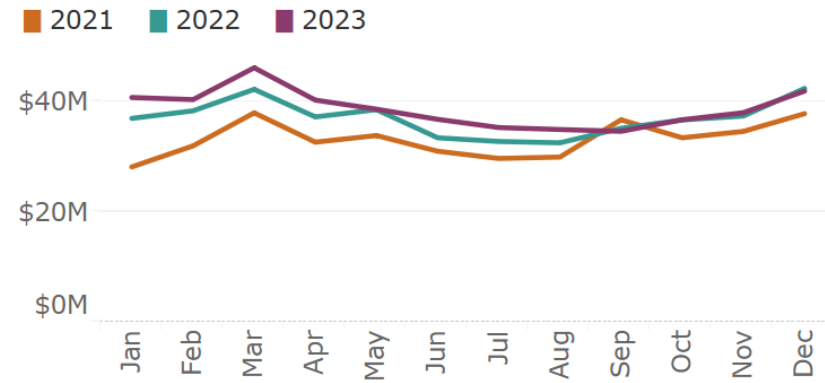
Retail



Amusement



Restaurant



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

Visitor Summary



2023 Visitor Summary: La Paz County



81%

Overnight Visitor Share



49%

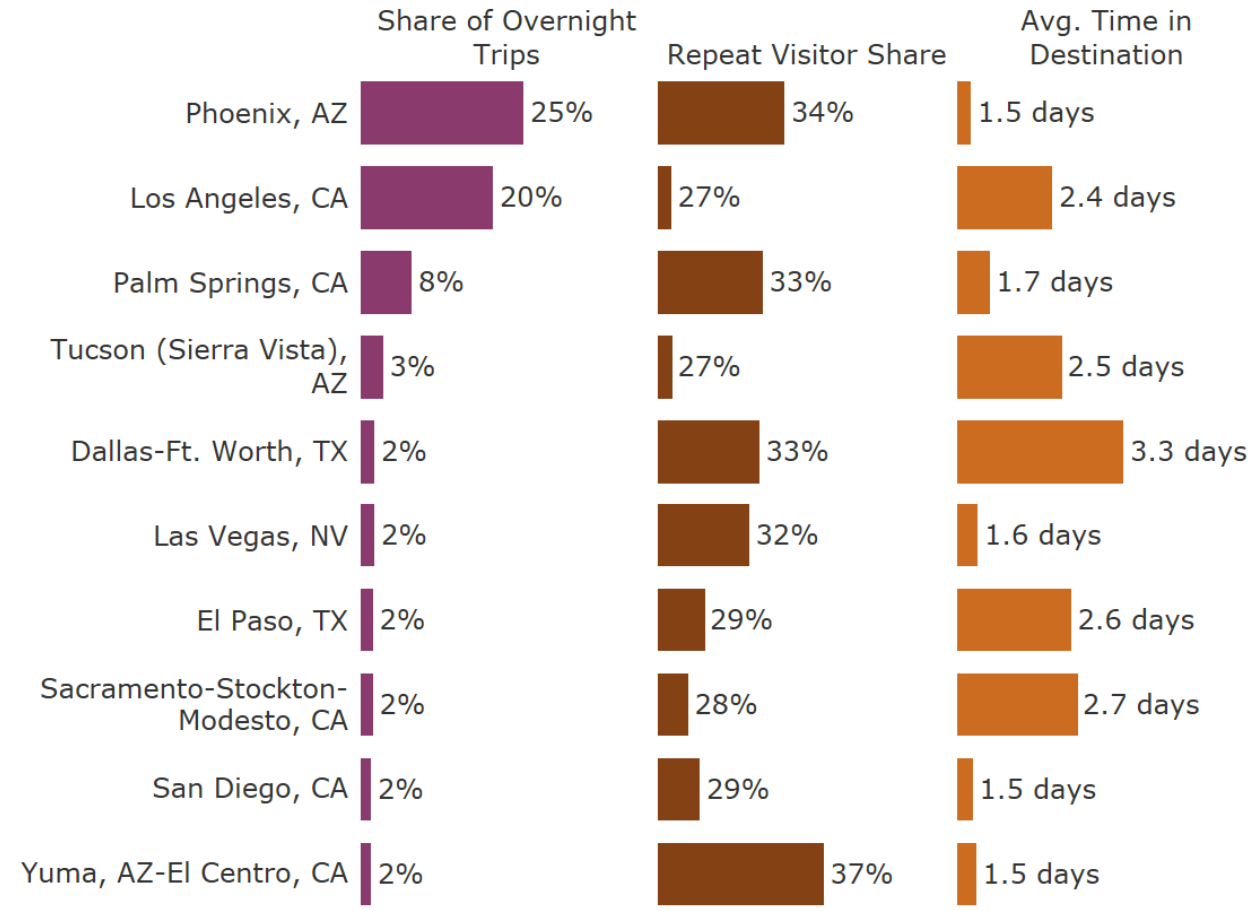
Repeat Visitor Share



2.5 days

Avg. Time in Destination

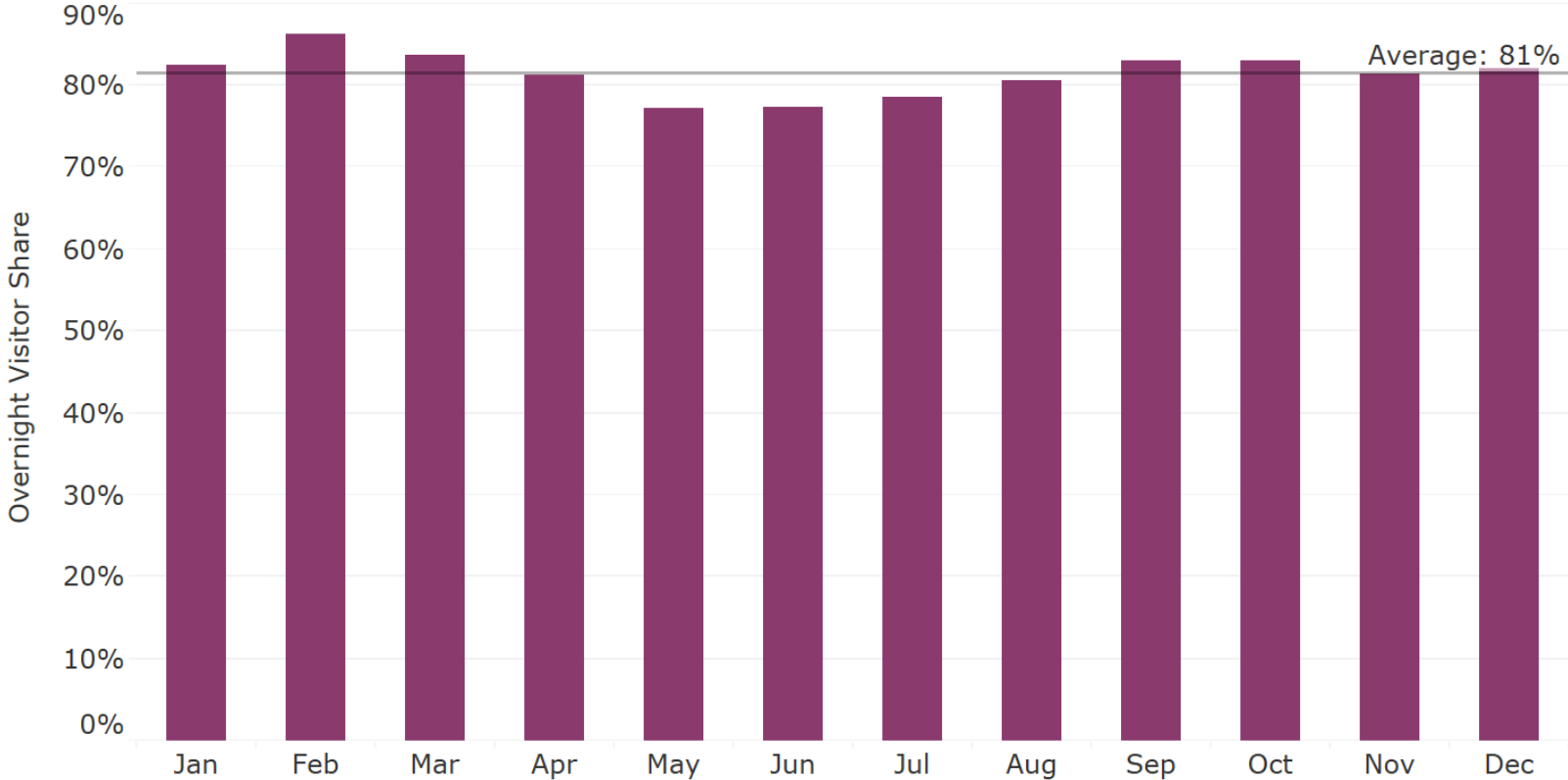
Top 10 Overnight Visitor Origins



Source: Azira

Overnight Visitor Share: La Paz County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

2023 Visitor Summary: Mohave County



81%

Overnight Visitor Share



51%

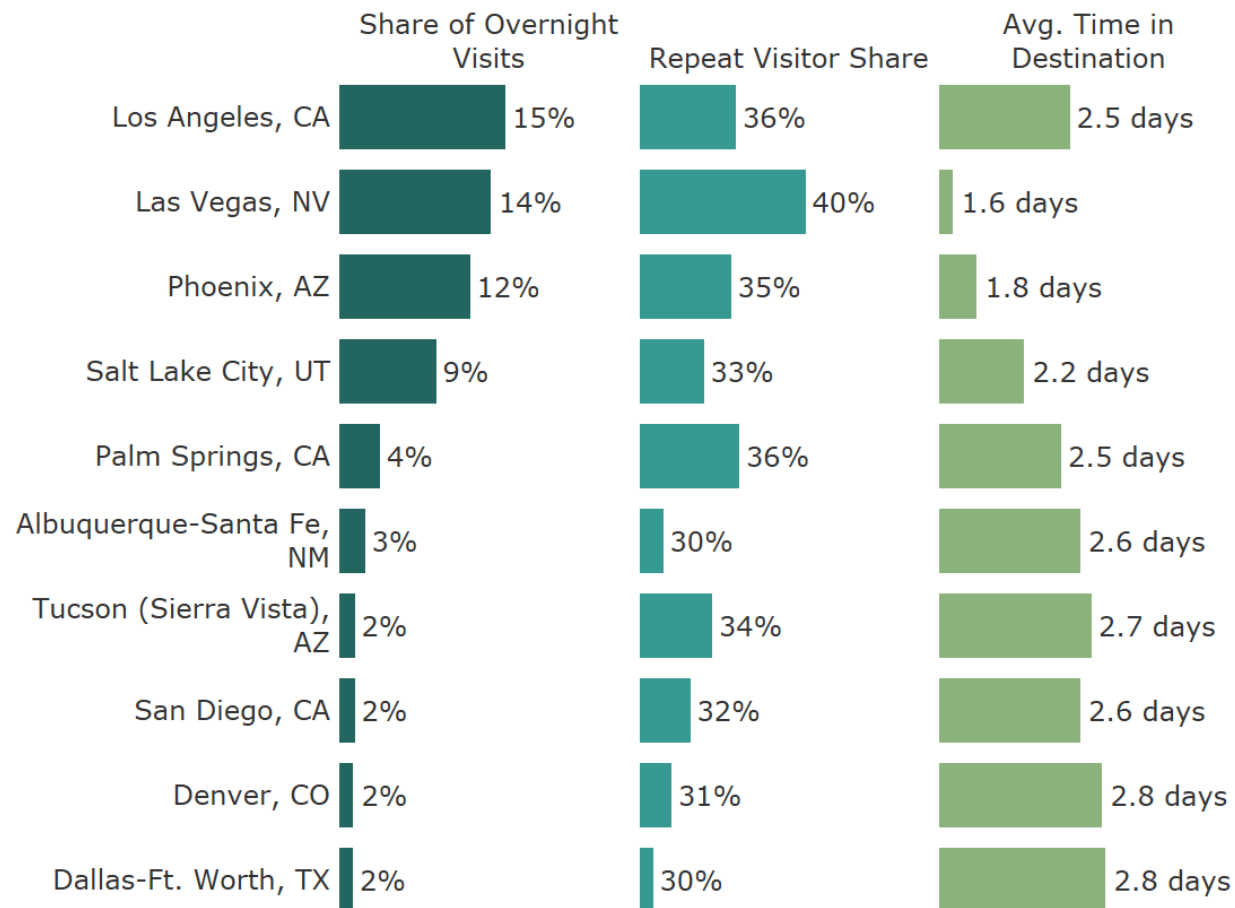
Repeat Visitor Share



2.7 days

Avg. Time in Destination

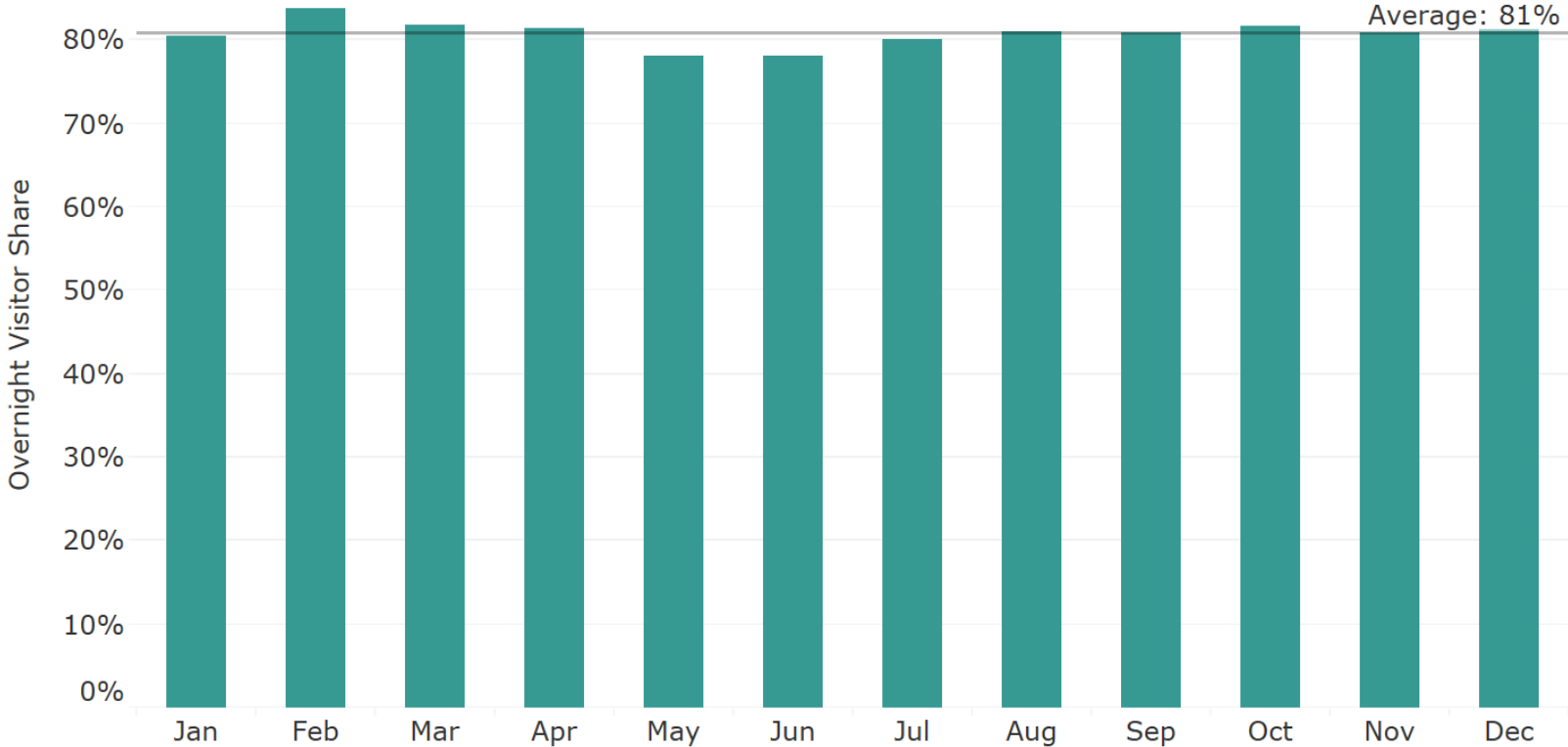
Top 10 Overnight Visitor Origins



Source: Azira


Overnight Visitor Share: Mohave County

2023 Overnight Visitor Share Monthly Trend



Source: Azira

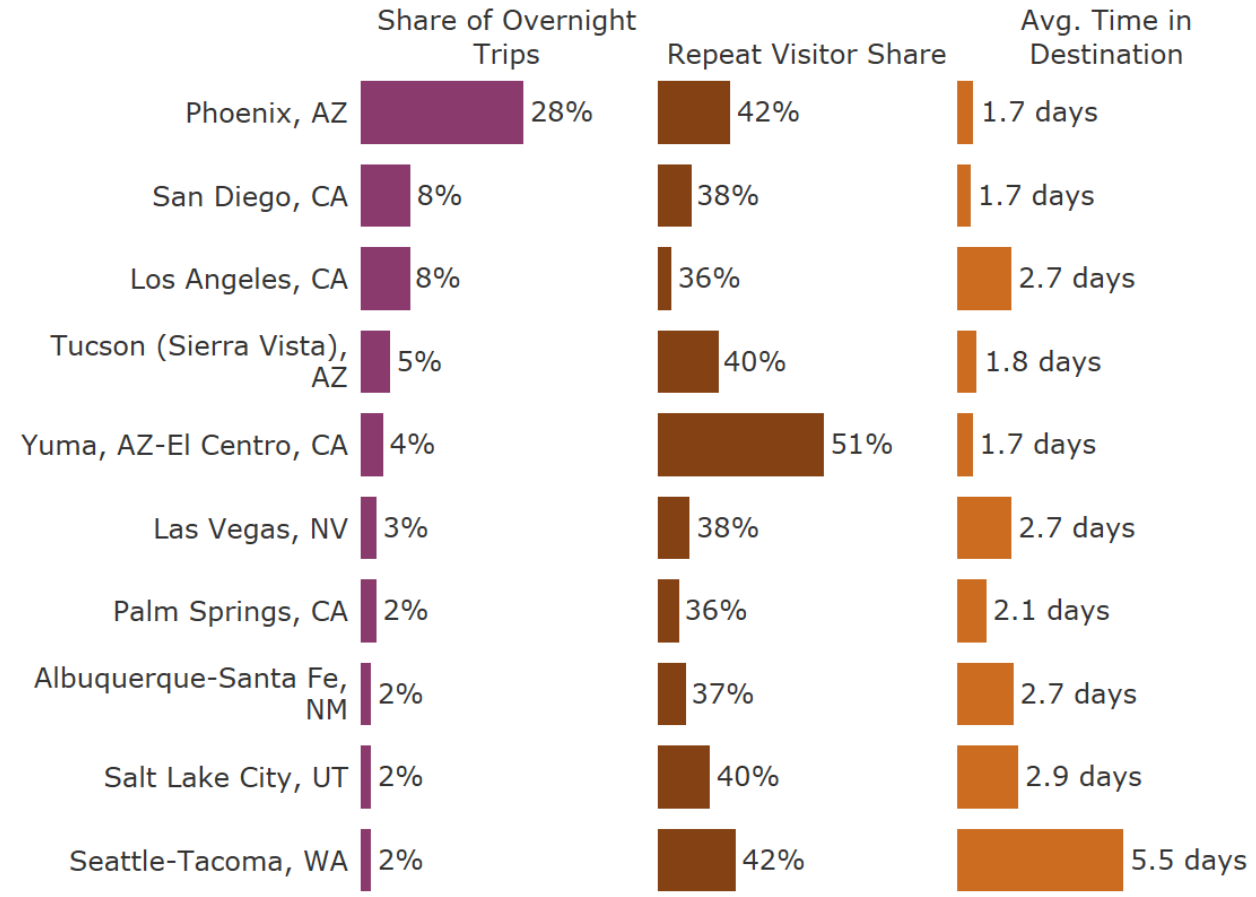
2023 Visitor Summary: Yuma County


81%
 Overnight Visitor Share


55%
 Repeat Visitor Share


2.7 days
 Avg. Time in Destination

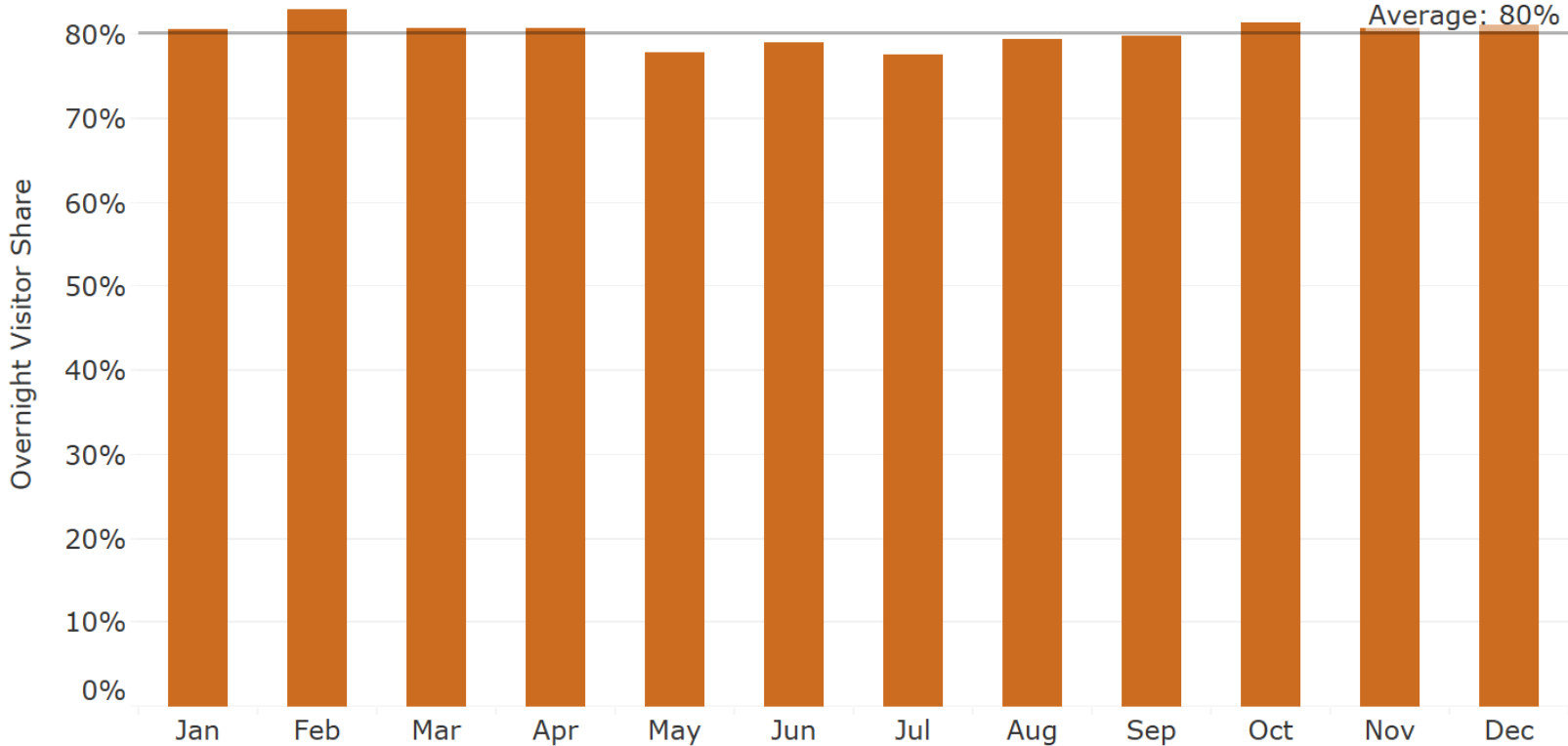
Top 10 Overnight Visitor Origins



Source: Azira

Overnight Visitor Share: Yuma County

2023 Overnight Visitor Share Monthly Trend



Source: Azira