

# TRACKING DOMESTIC VISITOR VOLUMES FOR ARIZONA

## 2024 Q4 and 2024 Full Year Estimates

Prepared for:  
The Arizona Office of Tourism



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# QUARTERLY SUMMARY

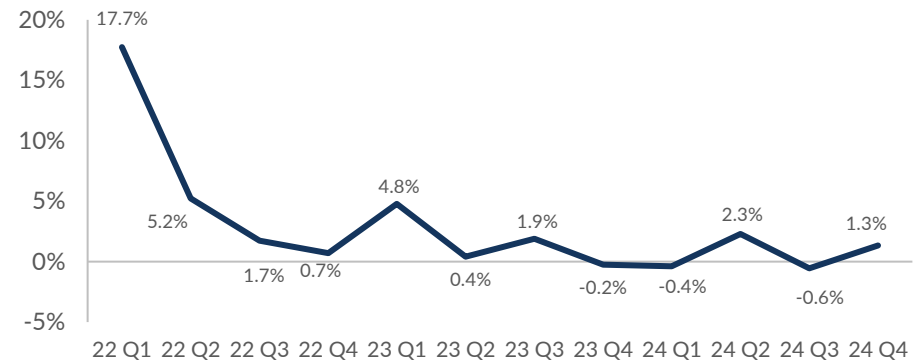
2024 Q4

**Overnight visitation to Arizona during 2024 Q4 increased 1.3% relative to a year ago.**

After falling even with pre-pandemic levels in the previous year, travel activity in 2024 Q4 was 1.3% higher than in 2019 Q4. Business visitation grew rapidly for the second time in the past three quarters, increasing 4.0% relative to 2023 Q4.

## Overnight visitation 2022 Q1 - 2024 Q4

Amounts expressed in % change relative to 2019 levels



Source: Arizona Office of Tourism/Tourism Economics

Annual % growth	2022				2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Total Overnight Visitors</b>	17.7%	5.2%	1.7%	0.7%	4.8%	0.4%	1.9%	-0.2%	-0.4%	2.3%	-0.6%	1.3%
Overnight Leisure	13.6%	3.7%	0.9%	0.0%	4.7%	0.2%	1.6%	-0.5%	-0.7%	2.0%	-0.6%	0.8%
Overnight Business	43.4%	15.3%	7.4%	4.3%	5.1%	1.7%	3.6%	1.3%	1.2%	3.9%	-0.2%	4.0%
Overnight Resident	12.2%	5.7%	1.1%	0.5%	7.0%	0.3%	4.2%	1.8%	-1.1%	2.3%	-0.9%	0.7%
Overnight Nonresident	19.9%	5.0%	2.0%	0.8%	4.0%	0.5%	1.0%	-0.9%	-0.1%	2.3%	-0.4%	1.6%

# QUARTERLY SUMMARY

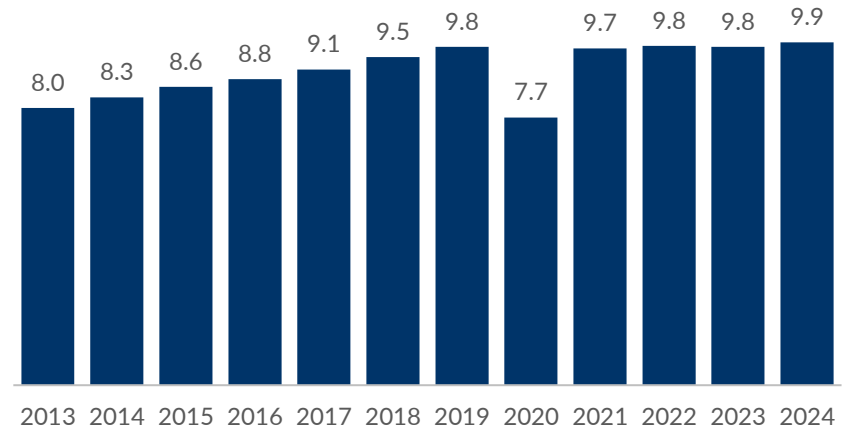
2024 Q4

Overnight visits to Arizona in 2024 reached **9.9 million.**

Overnight visits were estimated at 9.9 million, a record for Q4 and approximately 130,000 visits above levels from a year ago.

## Overnight visitor trend, 2024 Q4

Amounts expressed in millions



Source: Arizona Office of Tourism/Tourism Economics

# QUARTERLY SUMMARY

2024 Q4

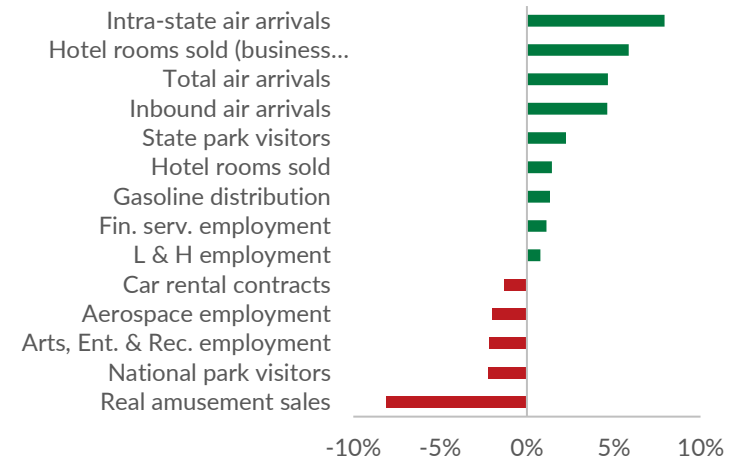
Several key indicators, including hotel group demand, total air arrivals, and hotel rooms sold, experienced increases relative to the previous year.

The number of hotel rooms sold, an important indicator of overnight demand, increased 1.4% year-over-year to grow to 3.0% above 2019 levels. Intra-state air arrivals was the only metric to fall below 2019 levels.

Real amusement sales (-8.1%) and national park visitors (-2.2%) both decreased in 2024 Q4, reversing the growth trend from the previous years, but remained above 2019 levels.

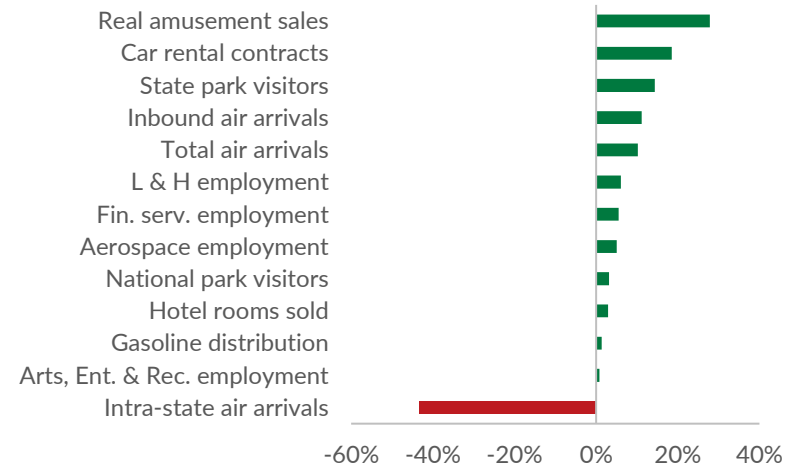
## Indicator growth, 2024 Q4

Amounts expressed in % change year-over-year



## Indicator growth, 2024 Q4

Amounts expressed in % change from the same quarter in 2019



Source: Tourism Economics

# DOMESTIC OVERNIGHT VISITOR VOLUME ESTIMATES

2024 Q4

Millions	2019				2020				2021				2022				2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Total Overnight Visitors	10.74	10.31	9.82	9.76	9.55	5.35	7.52	7.72	8.74	9.92	9.51	9.71	10.30	10.44	9.67	9.78	10.79	10.48	9.86	9.76	10.75	10.72	9.80	9.89
Overnight Leisure	8.84	8.71	8.38	8.03	8.00	4.80	6.78	6.70	7.54	8.60	8.27	8.12	8.56	8.92	8.34	8.12	8.97	8.93	8.49	8.10	8.91	9.11	8.44	8.16
Overnight Business	1.89	1.60	1.44	1.73	1.55	0.55	0.73	1.02	1.21	1.32	1.24	1.59	1.73	1.52	1.33	1.66	1.82	1.55	1.37	1.66	1.84	1.61	1.36	1.73
Overnight Resident	2.84	2.98	2.82	2.54	2.68	1.96	2.32	2.21	2.47	2.95	2.81	2.54	2.77	3.11	2.84	2.56	2.97	3.12	2.94	2.58	2.93	3.20	2.91	2.60
Overnight Nonresident	7.90	7.33	7.00	7.22	6.87	3.39	5.20	5.52	6.27	6.97	6.70	7.17	7.52	7.32	6.84	7.22	7.82	7.36	6.92	7.17	7.82	7.53	6.89	7.29

Annual % growth	2019				2020				2021				2022				2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Total Overnight Visitors	1.8%	1.8%	3.8%	3.2%	-11.1%	-48.1%	-23.4%	-20.9%	-8.4%	85.3%	26.5%	25.8%	17.7%	5.2%	1.7%	0.7%	4.8%	0.4%	1.9%	-0.2%	-0.4%	2.3%	-0.6%	1.3%
Overnight Leisure	1.8%	1.6%	4.2%	3.4%	-9.6%	-44.9%	-19.1%	-16.5%	-5.8%	79.2%	21.9%	21.2%	13.6%	3.7%	0.9%	0.0%	4.7%	0.2%	1.6%	-0.5%	-0.7%	2.0%	-0.6%	0.8%
Overnight Business	1.8%	3.1%	1.7%	2.3%	-18.1%	-65.3%	-48.9%	-41.1%	-22.1%	138.2%	68.4%	56.2%	43.4%	15.3%	7.4%	4.3%	5.1%	1.7%	3.6%	1.3%	1.2%	3.9%	-0.2%	4.0%
Overnight Resident	1.5%	0.5%	1.6%	2.2%	-5.6%	-34.2%	-17.5%	-13.0%	-7.7%	50.2%	20.8%	15.3%	12.2%	5.7%	1.1%	0.5%	7.0%	0.3%	4.2%	1.8%	-1.1%	2.3%	-0.9%	0.7%
Overnight Nonresident	1.9%	2.4%	4.7%	3.6%	-13.0%	-53.8%	-25.8%	-23.6%	-8.7%	105.7%	29.0%	30.0%	19.9%	5.0%	2.0%	0.8%	4.0%	0.5%	1.0%	-0.9%	-0.1%	2.3%	-0.4%	1.6%

# SHARE OF DOMESTIC OVERNIGHT VISITS

2024 Q4

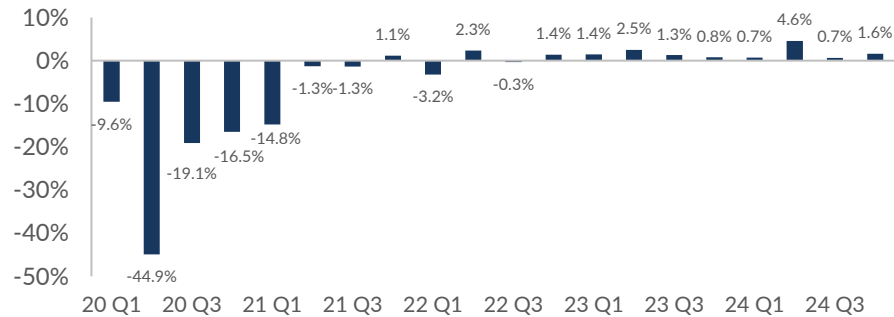
Percent	2019				2020				2021				2022				2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Overnight Leisure	82.4%	84.5%	85.4%	82.3%	83.8%	89.7%	90.2%	86.8%	86.2%	86.7%	87.0%	83.6%	83.2%	85.4%	86.3%	83.0%	83.1%	85.2%	86.1%	83.0%	82.9%	85.0%	86.1%	82.5%
Overnight Business	17.6%	15.5%	14.6%	17.7%	16.2%	10.3%	9.8%	13.2%	13.8%	13.3%	13.0%	16.4%	16.8%	14.6%	13.7%	17.0%	16.9%	14.8%	13.9%	17.0%	17.1%	15.0%	13.9%	17.5%
Overnight Resident	26.4%	28.9%	28.7%	26.0%	28.0%	36.7%	30.9%	28.6%	28.3%	29.7%	29.5%	26.2%	26.9%	29.8%	29.3%	26.1%	27.5%	29.8%	29.8%	26.5%	27.2%	29.8%	29.7%	26.3%
Overnight Nonresident	73.6%	71.1%	71.3%	74.0%	72.0%	63.3%	69.1%	71.4%	71.7%	70.3%	70.5%	73.8%	73.1%	70.2%	70.7%	73.9%	72.5%	70.2%	70.2%	73.5%	72.8%	70.2%	70.3%	73.7%

# VISITATION COMPARED TO 2019 LEVELS

2024 Q4

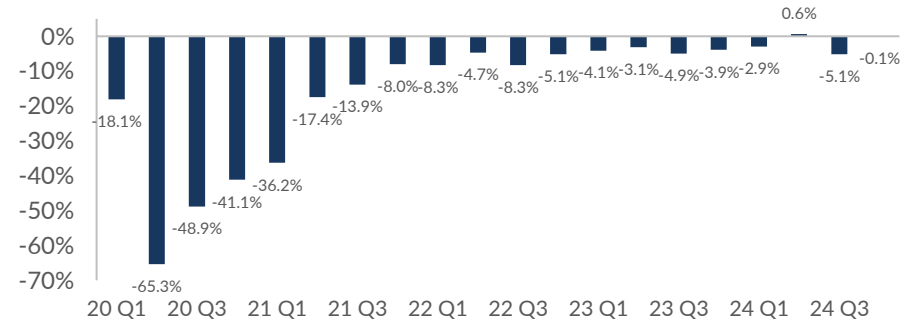
## Leisure

Amounts expressed in % change versus same quarter in 2019



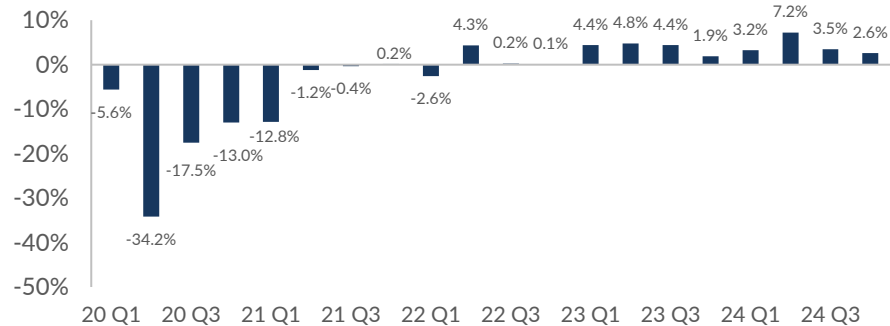
## Business

Amounts expressed in % change versus same quarter in 2019



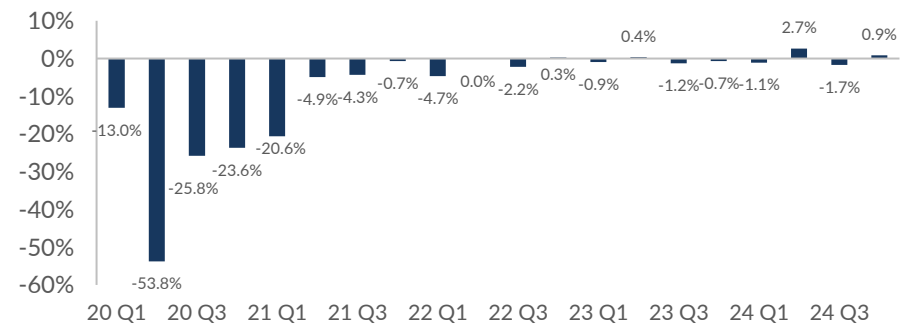
## Resident

Amounts expressed in % change versus same quarter in 2019



## Nonresident

Amounts expressed in % change versus same quarter in 2019



Source: Tourism Economics

# OVERNIGHT VISITATION

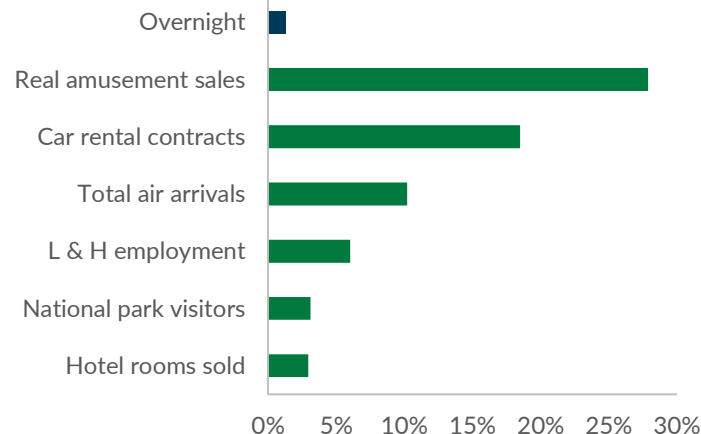
2024 Q4

**Total overnight visitation was 1.3% above 2019 levels in 2024 Q4.**

Hotel rooms sold grew by 1.4% and were 3.0% above 2019 levels in 2024 Q4. This was a major contributor to overnight visitor growth. Total air arrivals were an important contributor to year-over-year visitor growth, increasing 4.7% over 2023 Q4. Leisure and hospitality employment further aided year-over-year growth, with a 0.8% increase.

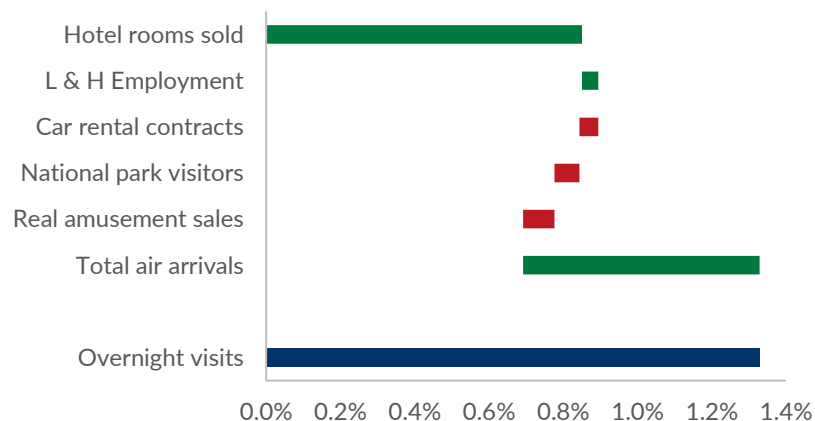
## Overnight visits and indicator growth, 2024 Q4

Amounts expressed in % change relative to 2019



## Contributions to overnight growth, 2024 Q4

Amounts expressed as %-point contribution to year-over-year growth



Source: Tourism Economics

# OVERNIGHT LEISURE VISITATION

2024 Q4

**Leisure visitation to Arizona in 2024 Q4 was up 1.6% relative to 2019 Q4.**

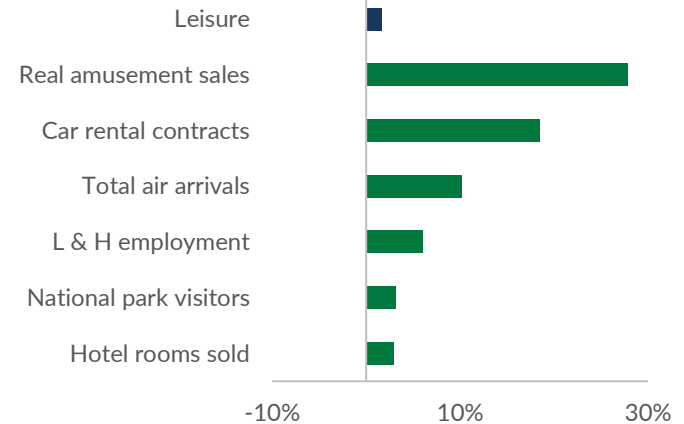
Leisure visits increased 0.8% year-over-year in 2024 Q4, reaching 1.6% above 2019 levels. Year-over-year visitation increase was driven by hotel rooms sold, which grew by 1.4% relative to 2023 Q4.

Total air arrivals (4.7% growth) and leisure and hospitality employment (0.8% growth) also contributed to year-over-year visitation growth. Real amusement sales, which decreased by 8.1% relative to 2023 Q4, were a negative contributor.

The share of leisure visitors was 82.5% in 2024 Q4, up 0.2 percentage points from its share in 2019 Q4 (82.3%).

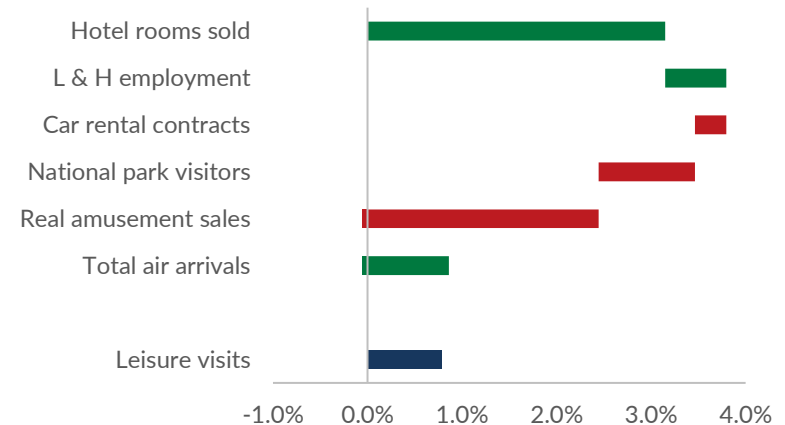
## Leisure visits and indicator growth, 2024 Q4

Amounts expressed in % change relative to 2019



## Contributions to leisure growth, 2024 Q4

Amounts expressed as %-point contribution to year-over-year growth



Source: Tourism Economics

# OVERNIGHT BUSINESS VISITATION

2024 Q4

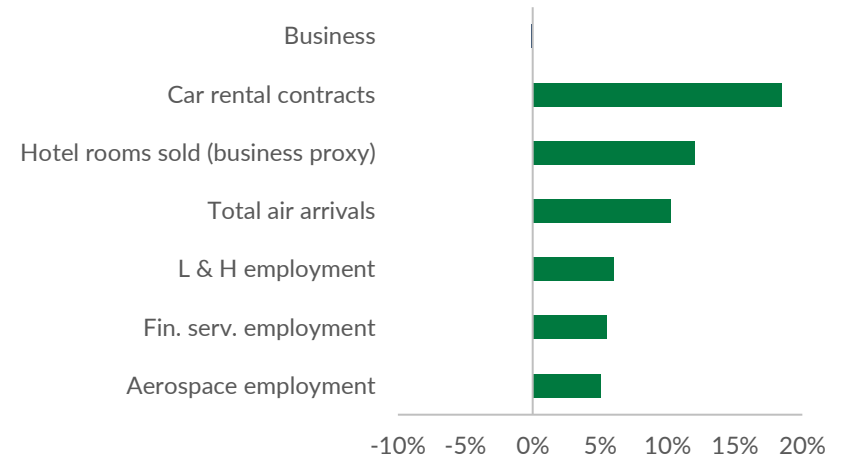
**Business visitation grew by 4.0% year-over-year, growing within 0.1% of pre-pandemic levels.**

Business visitation experienced strong year-over-year growth, growing 4.0% relative to 2023 Q4. Business visitation, which has been slower to recover from the pandemic, was only 0.1% below 2019 levels.

Hotel group demand, a key indicator of business visitation, was the biggest positive contributor, with 5.9% growth. Air arrivals also contributed positively to business visitation growth, reaching 10.2% above pre-pandemic levels. Car rental contracts were above pre-pandemic levels but were a negative contributor to business visitation growth.

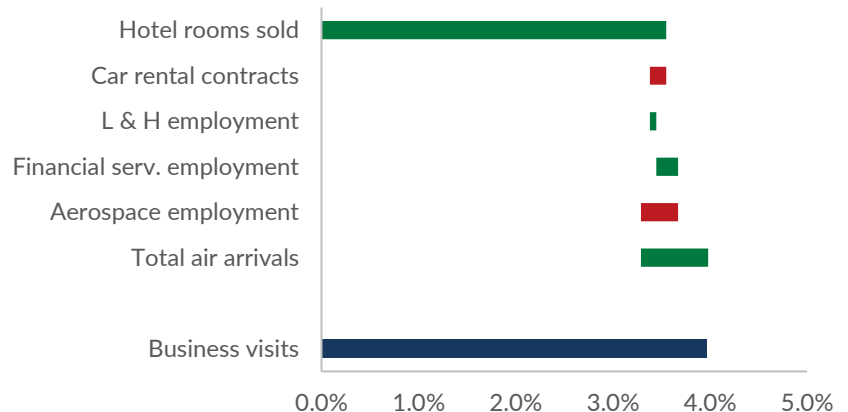
## Business visits and indicator growth, 2024 Q4

Amounts expressed in % change relative to 2019



## Contributions to business growth, 2024 Q4

Amounts expressed as %-point contribution to year-over-year growth



Source: Tourism Economics

# OVERNIGHT RESIDENT VISITATION

2024 Q4

**Resident overnight visitation to Arizona in 2024 Q4 was 2.6% above pre-pandemic levels.**

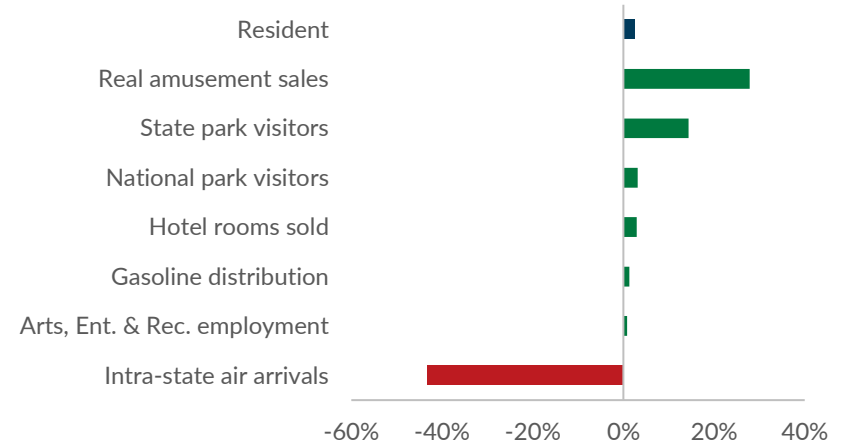
Resident visitation in 2024 Q4 increased by 0.7% year-over-year. The indicator driving this increase the most was gasoline distribution, which had a year-over-year growth of 1.3%.

Hotel rooms sold increased year-over-year, meaning it was a positive contributor to overnight resident visitor growth. State park visitors and intra-state air arrivals were also positive contributors.

Real amusement sales was a significant negative contributor to year-over-year growth, with a decrease of 8.1% relative to 2023 Q4.

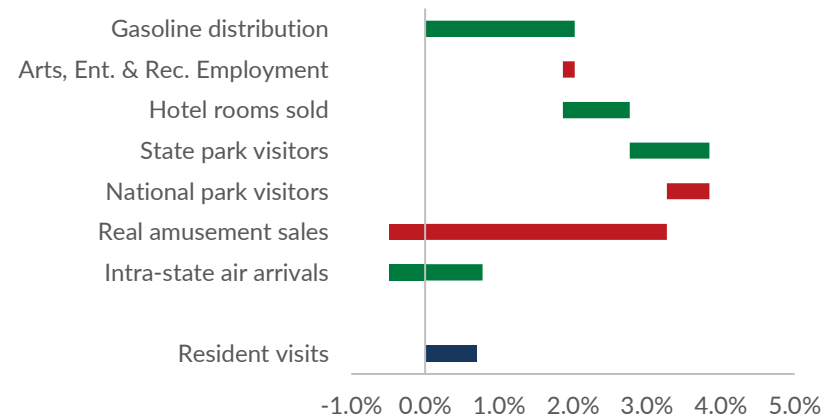
## Resident visits and indicator growth, 2024 Q4

Amounts expressed in % change relative to 2019



## Contributions to resident growth, 2024 Q4

Amounts expressed as %-point contribution to year-over-year growth



Source: Tourism Economics

# OVERNIGHT NON-RESIDENT VISITATION

2024 Q4

Non-resident visitation to Arizona in 2024 Q4 was 0.9% above pre-pandemic levels.

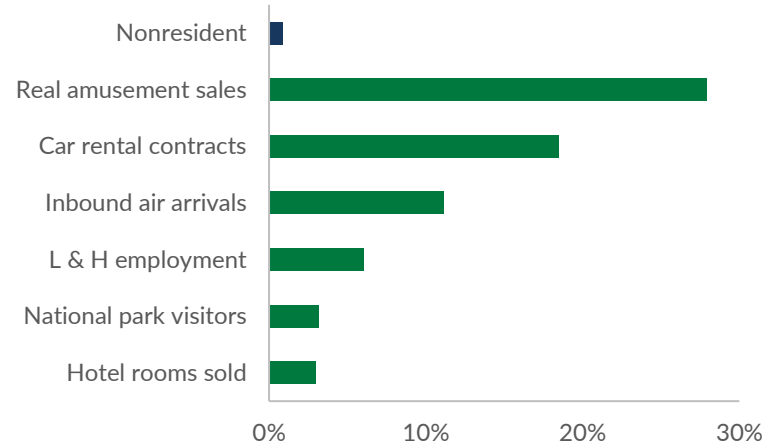
Non-resident visitation increased by 1.6% relative to the previous year.

The hotel rooms sold metric was the largest contributor to the growth in non-resident visitors. Leisure and hospitality employment and total air arrivals were also positive contributors, while national park visitors was a negative contributor

The non-resident visitor share in 2024 Q4 was 73.7%, 0.3 percentage points below the same quarter in 2019 (74.0%).

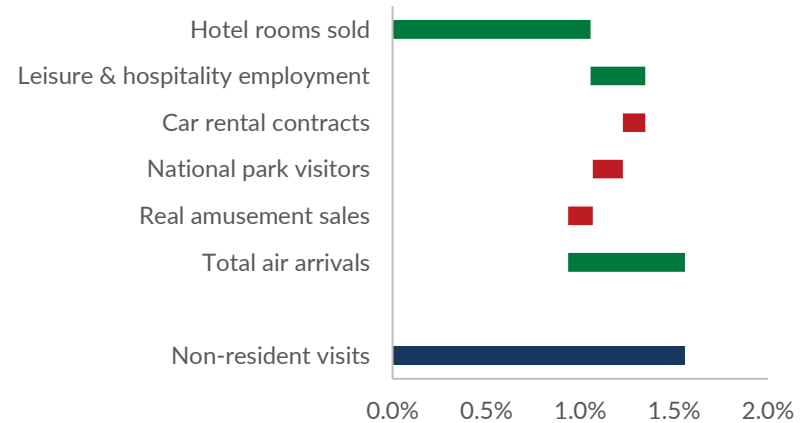
## Non-resident visits and indicator growth, 2024 Q4

Amounts expressed in % change relative to 2019



## Contributions to non-resident growth, 2024 Q4

Amounts expressed as %-point contribution to year-over-year growth



Source: Tourism Economics

# ANNUAL RESULTS

# ANNUAL VISITATION SUMMARY

2024

Arizona welcomed 41.16 million overnight domestic visitors for the year as visitation increased 0.7% in 2024 to set a new annual visitation record for the second year in a row.

The growth in visitation was led by business visits, which grew by 2.3% to reach 6.5 million, only 120,000 visits behind 2019 levels. Nonresident visits surpassed 2019 levels for the first time, growing by 0.8%.

Business visits were the main contributor to overnight visits growth in 2024. As this category of visits begins to move beyond 2019 levels, growth is likely to be more in line with the rest of the categories.

Millions	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Total Overnight Visitors</b>	<b>32.39</b>	<b>30.03</b>	<b>31.80</b>	<b>32.81</b>	<b>33.13</b>	<b>33.77</b>	<b>35.03</b>	<b>36.43</b>	<b>37.41</b>	<b>38.35</b>	<b>39.59</b>	<b>40.63</b>	<b>30.14</b>	<b>37.88</b>	<b>40.19</b>	<b>40.88</b>	<b>41.16</b>
Overnight Leisure	25.60	24.75	26.08	27.02	27.44	28.03	29.14	30.35	31.24	32.07	33.08	33.97	26.28	32.53	33.95	34.49	34.62
Overnight Business	6.79	5.28	5.72	5.79	5.69	5.74	5.90	6.08	6.17	6.28	6.51	6.66	3.86	5.35	6.24	6.39	6.54
Overnight Resident	9.70	8.96	9.25	9.31	9.37	9.56	9.89	10.20	10.44	10.68	11.01	11.17	9.17	10.77	11.28	11.61	11.64
Overnight Nonresident	22.69	21.08	22.55	23.50	23.76	24.22	25.14	26.23	26.97	27.67	28.58	29.46	20.98	27.11	28.90	29.28	29.52

Source: Tourism Economics

# ANNUAL OVERNIGHT VISITOR SHARES BY SEGMENT

2024

Annual % growth	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Total Overnight Visitors</b>	-4.2%	-7.3%	5.9%	3.2%	1.0%	1.9%	3.7%	4.0%	2.7%	2.5%	3.2%	2.6%	-25.8%	25.7%	6.1%	1.7%	0.7%
Overnight Leisure	-5.2%	-3.3%	5.4%	3.6%	1.5%	2.2%	3.9%	4.2%	2.9%	2.7%	3.1%	2.7%	-22.6%	23.8%	4.4%	1.5%	0.4%
Overnight Business	-0.2%	-22.2%	8.3%	1.3%	-1.7%	0.9%	2.7%	3.1%	1.5%	1.7%	3.8%	2.2%	-42.1%	38.8%	16.5%	2.8%	2.3%
Overnight Resident	-3.8%	-7.6%	3.3%	0.7%	0.6%	2.0%	3.5%	3.1%	2.3%	2.3%	3.1%	1.4%	-17.9%	17.5%	4.8%	3.3%	0.3%
Overnight Nonresident	-4.4%	-7.1%	7.0%	4.2%	1.1%	1.9%	3.8%	4.3%	2.8%	2.6%	3.3%	3.1%	-28.8%	29.3%	6.6%	1.1%	0.8%

Percent	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Overnight Leisure	79.0%	82.4%	82.0%	82.3%	82.8%	83.0%	83.2%	83.3%	83.5%	83.6%	83.5%	83.6%	87.2%	85.9%	84.5%	84.4%	84.1%
Overnight Business	21.0%	17.6%	18.0%	17.7%	17.2%	17.0%	16.8%	16.7%	16.5%	16.4%	16.5%	16.4%	12.8%	14.1%	15.5%	15.6%	15.9%
Overnight Resident	29.9%	29.8%	29.1%	28.4%	28.3%	28.3%	28.2%	28.0%	27.9%	27.8%	27.8%	27.5%	30.4%	28.4%	28.1%	28.4%	28.3%
Overnight Nonresident	70.1%	70.2%	70.9%	71.6%	71.7%	71.7%	71.8%	72.0%	72.1%	72.2%	72.2%	72.5%	69.6%	71.6%	71.9%	71.6%	71.7%

Source: Tourism Economics

# TOURISM ECONOMICS

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