

NORTHERN REGION

TRAVEL RESEARCH TRENDS



Arizona Travel Impact



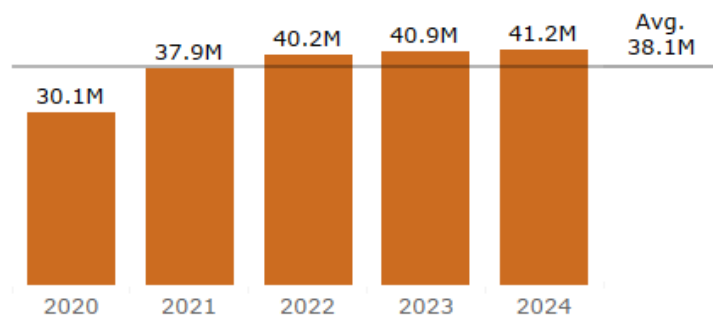
State Domestic Travel Impact



2024 Total Overnight Visitors

41.2M

+0.7% YOY | +1.3% vs. 2019



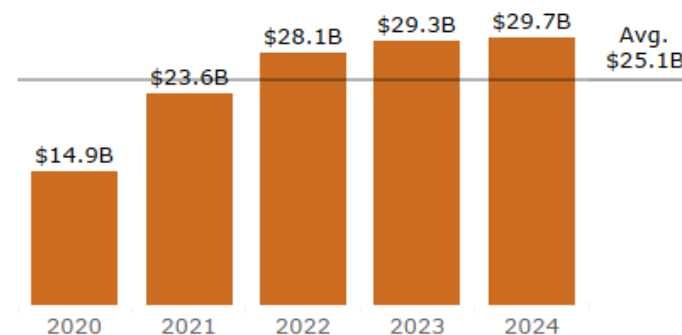
Source: Tourism Economics



2024 Total Spending

\$29.7B

+1.4% YOY | +16.2% vs. 2019

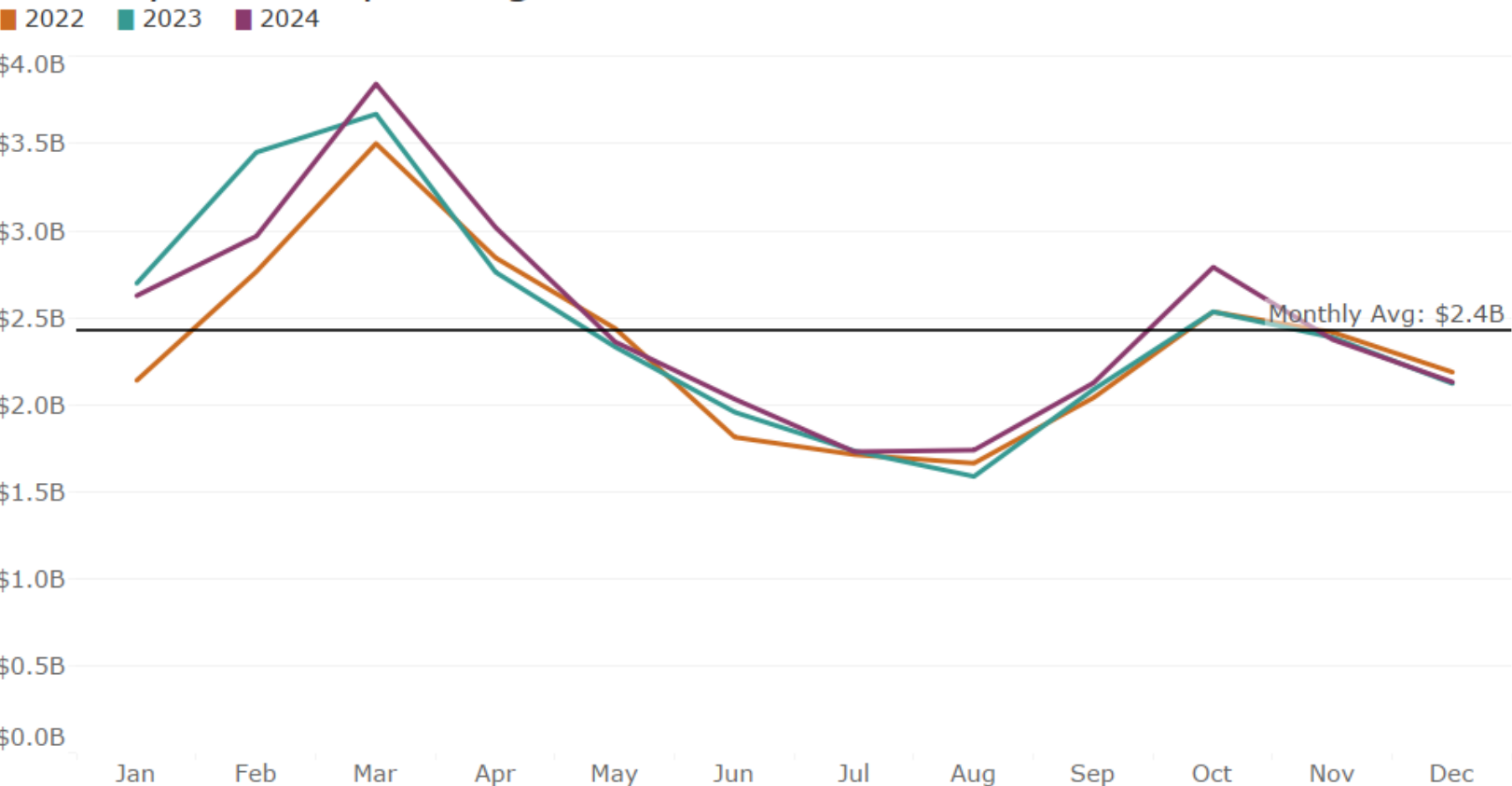


Source: Dean Runyan Associates

State Domestic Travel Impact



Monthly Travel Spending Trend



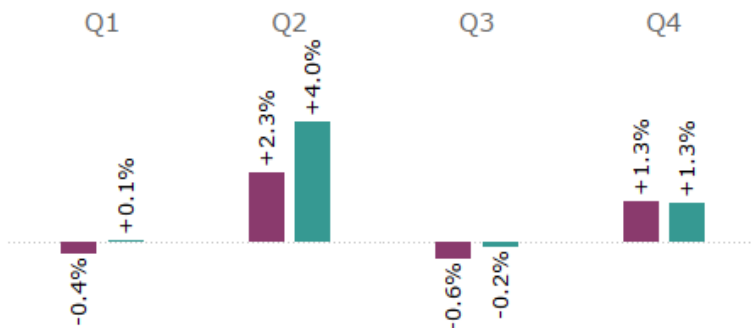
Source: Dean Runyan Associates

State Domestic Travel Impact

III

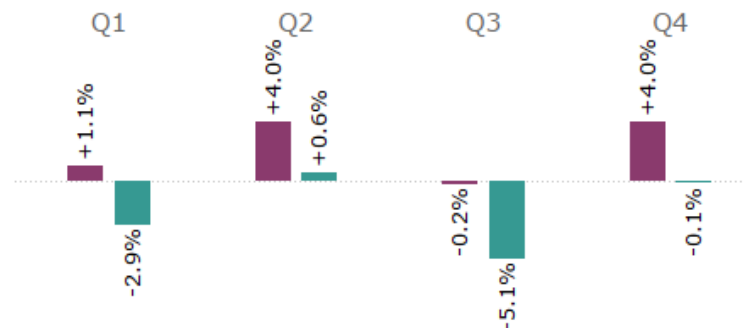
All Overnight Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



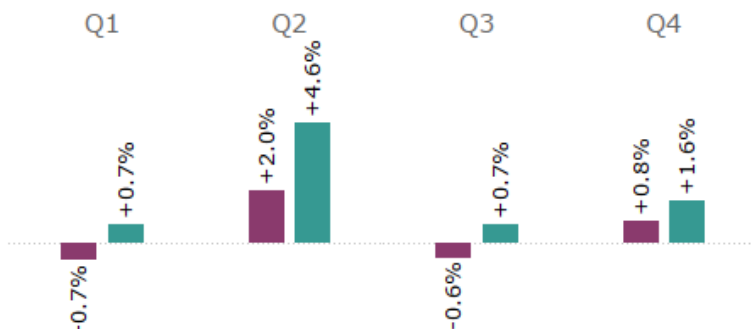
Overnight Business Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



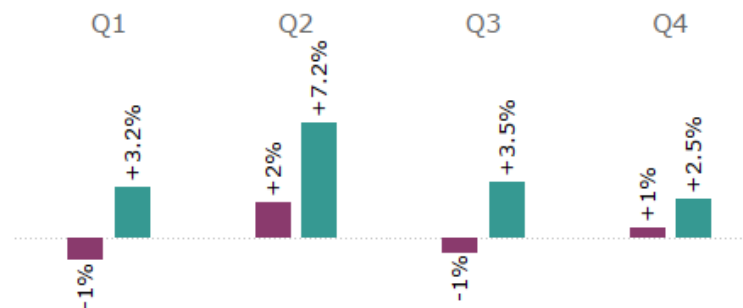
Overnight Leisure Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



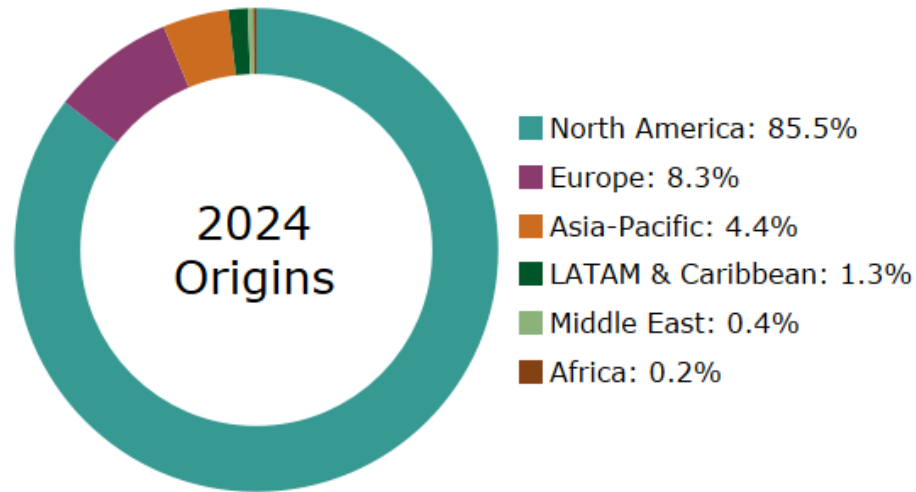
Overnight Resident Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019

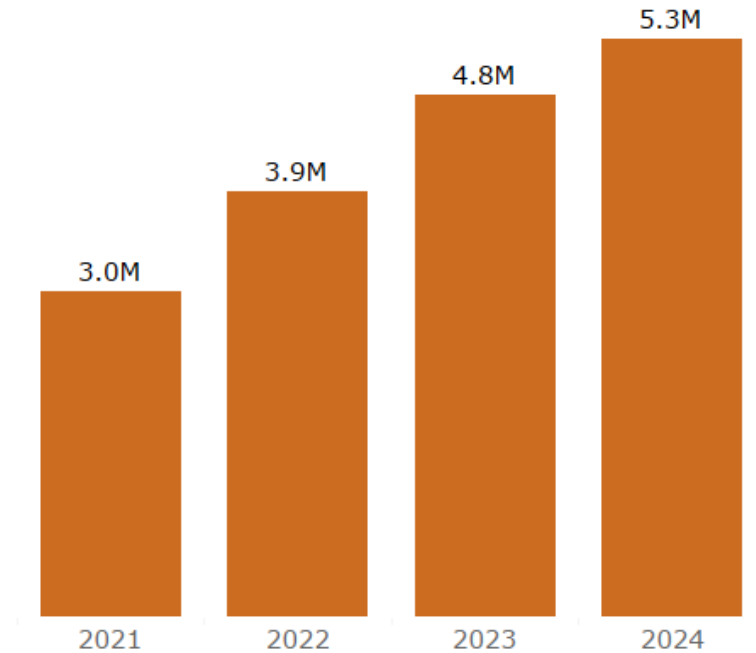


Source: Tourism Economics

State International Travel Impact



Annual International Overnight Visits
Last 4 years



Source: Tourism Economics International State Travel

Travel Impact by County



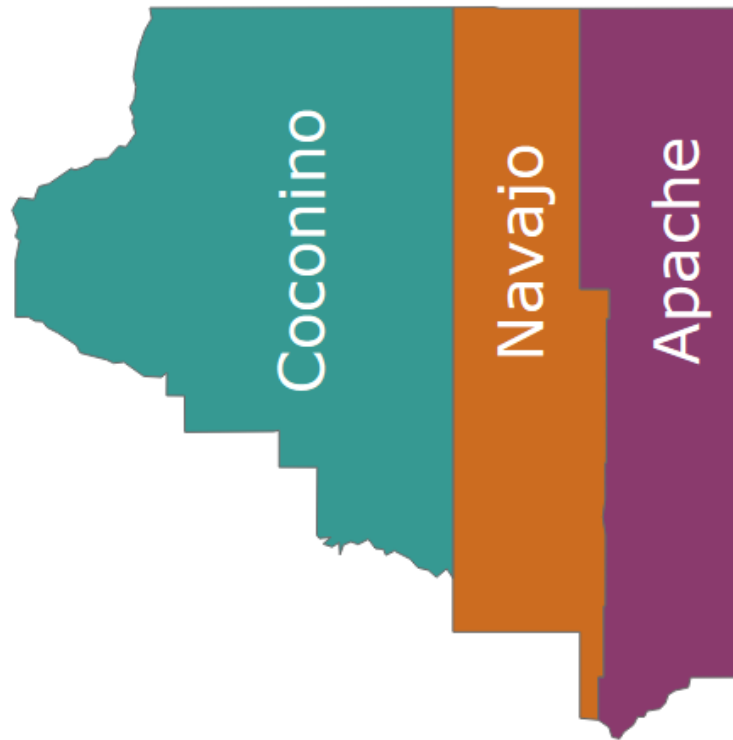
2024 Total Spending: Northern Region



Coconino
\$1.9B
+3.7% YOY

Navajo
\$430.2M
+0.0% YOY

Apache
\$139.7M
-2.8% YOY



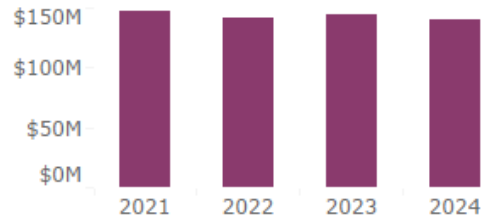
Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Apache County



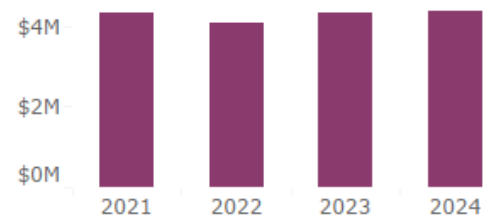
Direct Travel Spending

-\$4.0M
-2.8% YOY



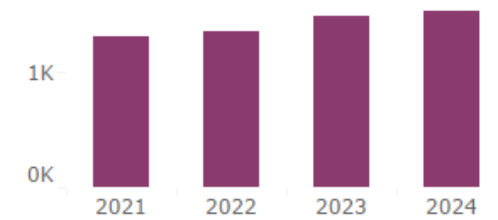
Local Tax Receipts

+\$15.4K
+0.4% YOY



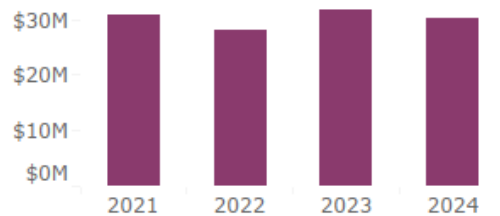
Employment

+40
+2.7% YOY



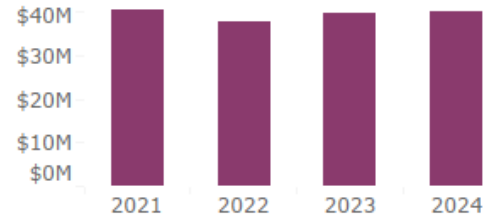
Accommodations Spending

-\$1.4M
-4.3% YOY



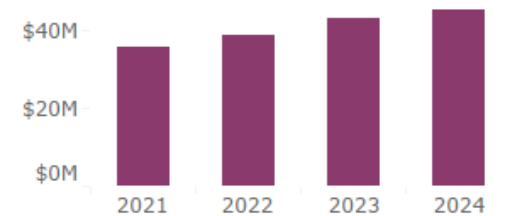
Food Service Spending

+\$384.1K
+1.0% YOY



Earnings

+\$2.0M
+4.6% YOY

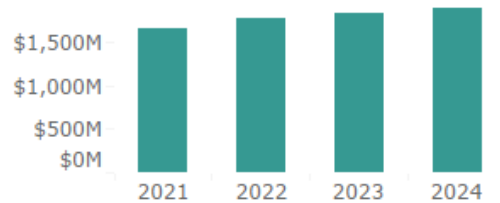


Source: Arizona Travel Impacts, Dean Runyan Associates

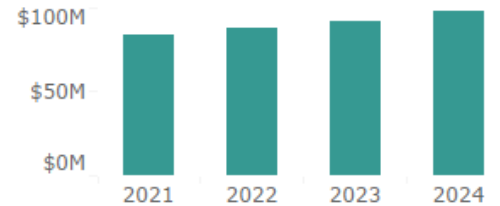
Travel Impacts: Coconino County



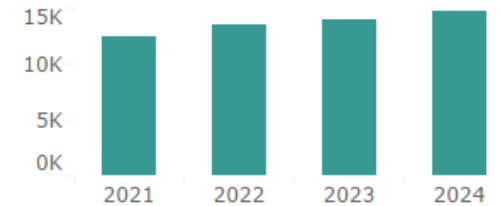
Direct Travel Spending
+\$67.6M
+3.7% YOY



Local Tax Receipts
+\$5.8M
+6.3% YOY



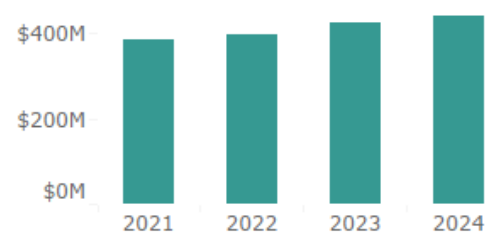
Employment
+850
+6.2% YOY



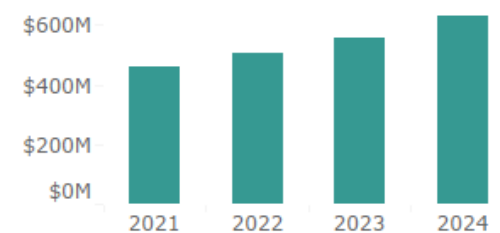
Accommodations Spending
+\$33.2M
+4.5% YOY



Food Service Spending
+\$16.8M
+3.9% YOY



Earnings
+\$74.9M
+13.4% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

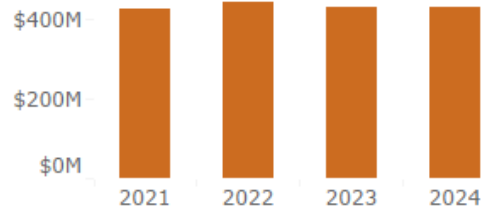
Travel Impacts: Navajo County



Direct Travel Spending

-\$204.3K

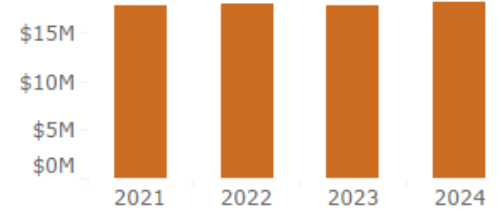
+0.0% YOY



Local Tax Receipts

+\$250.1K

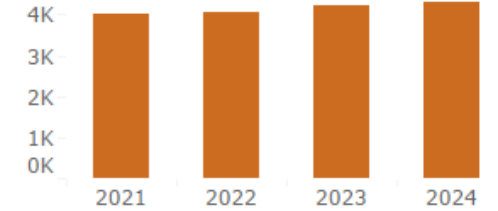
+1.4% YOY



Employment

+80

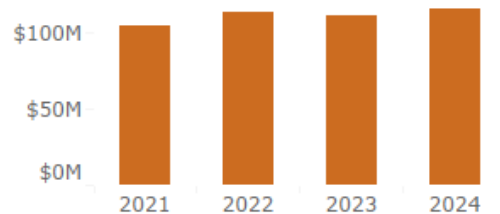
+1.9% YOY



Accommodations Spending

+\$3.8M

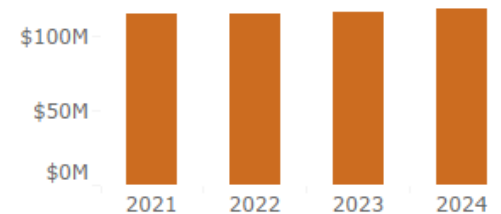
+3.4% YOY



Food Service Spending

+\$1.7M

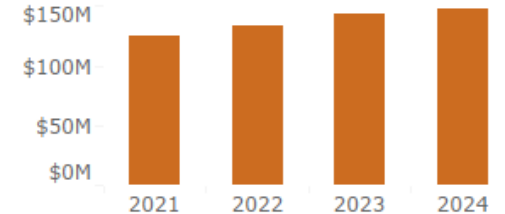
+1.4% YOY



Earnings

+\$4.0M

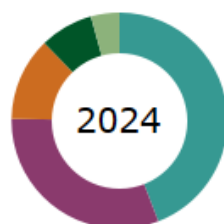
+2.8% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

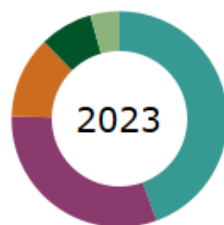
Spend by Accommodation Type: Apache County

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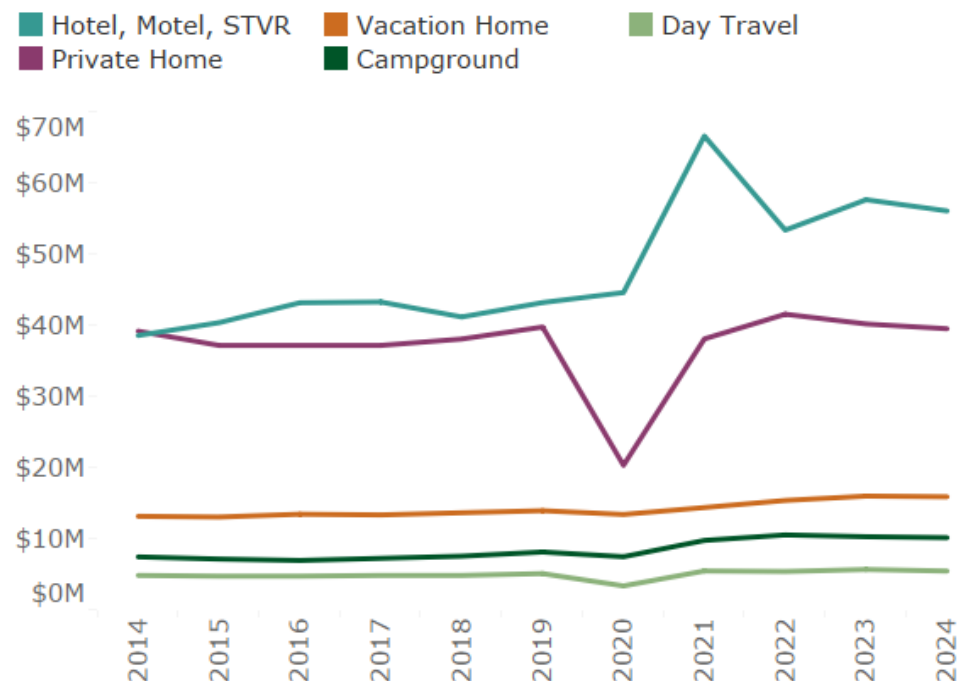
2024

Hotel, Motel, STVR: 44.2%
Private Home: 31.1%
Vacation Home: 12.5%
Campground: 8.0%
Day Travel: 4.3%



2023

Hotel, Motel, STVR: 44.5%
Private Home: 31.0%
Vacation Home: 12.3%
Campground: 7.9%
Day Travel: 4.4%

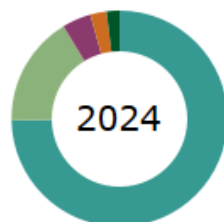


Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

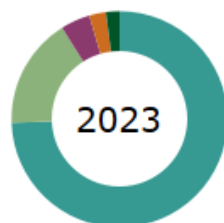
Spend by Accommodation Type: Coconino County

≡



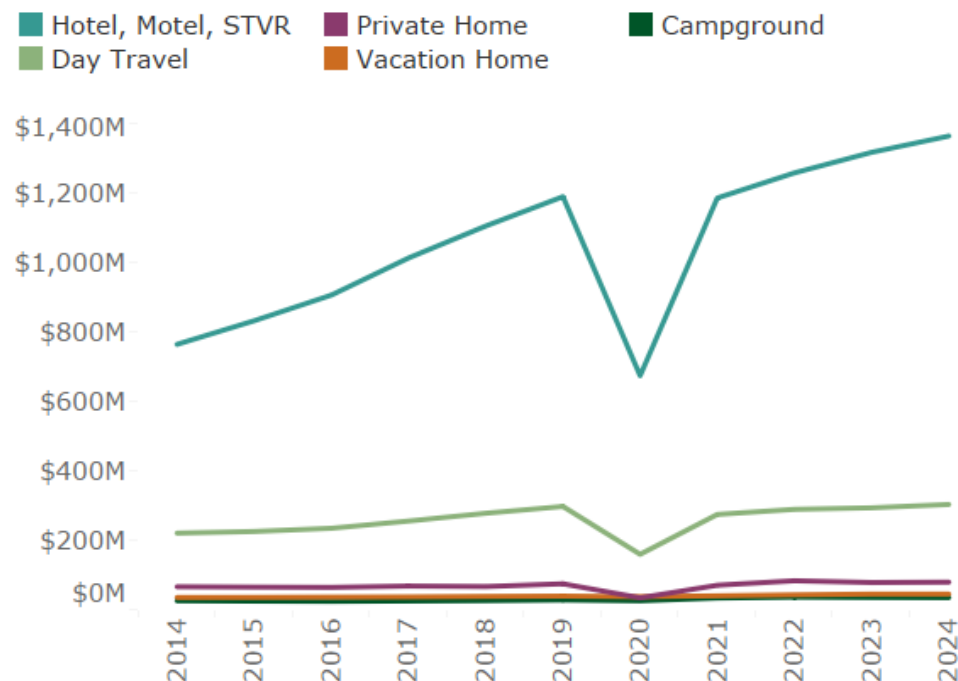
2024

- Hotel, Motel, STVR: 74.7%
- Day Travel: 16.6%
- Private Home: 4.3%
- Vacation Home: 2.4%
- Campground: 1.9%



2023

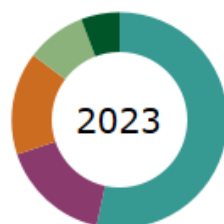
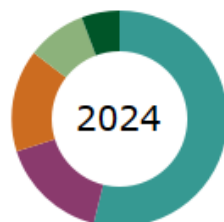
- Hotel, Motel, STVR: 74.5%
- Day Travel: 16.6%
- Private Home: 4.4%
- Vacation Home: 2.5%
- Campground: 2.0%



Source: Arizona Travel Impacts, Dean Runyan Associates

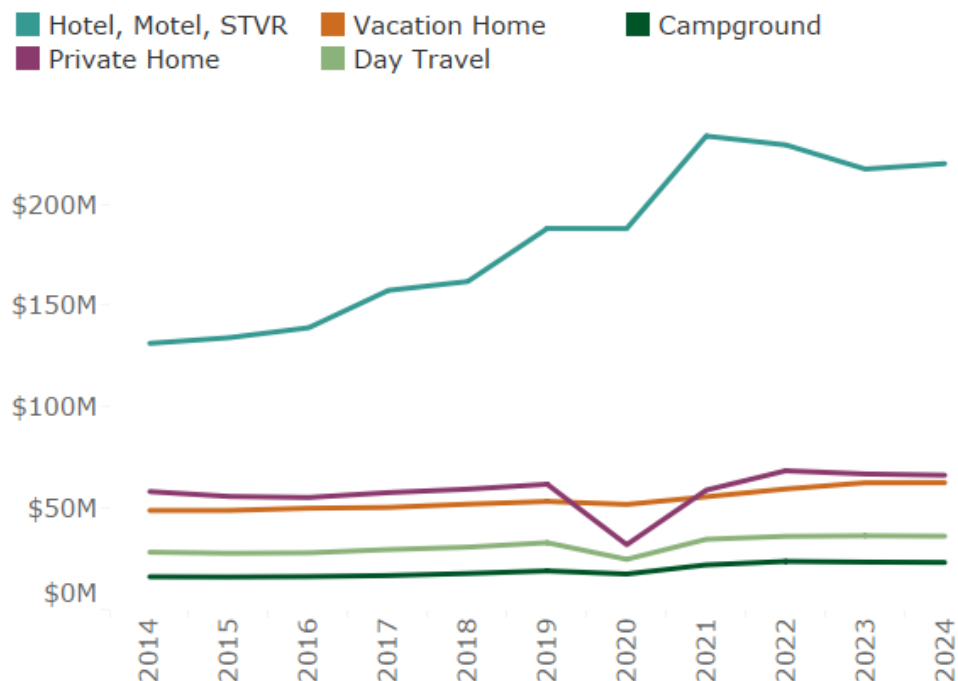
* STVR stands for Short-Term Vacation Rental

Spend by Accommodation Type: Navajo County



Hotel, Motel, STVR: 53.9%
Private Home: 16.2%
Vacation Home: 15.3%
Day Travel: 8.9%
Campground: 5.7%

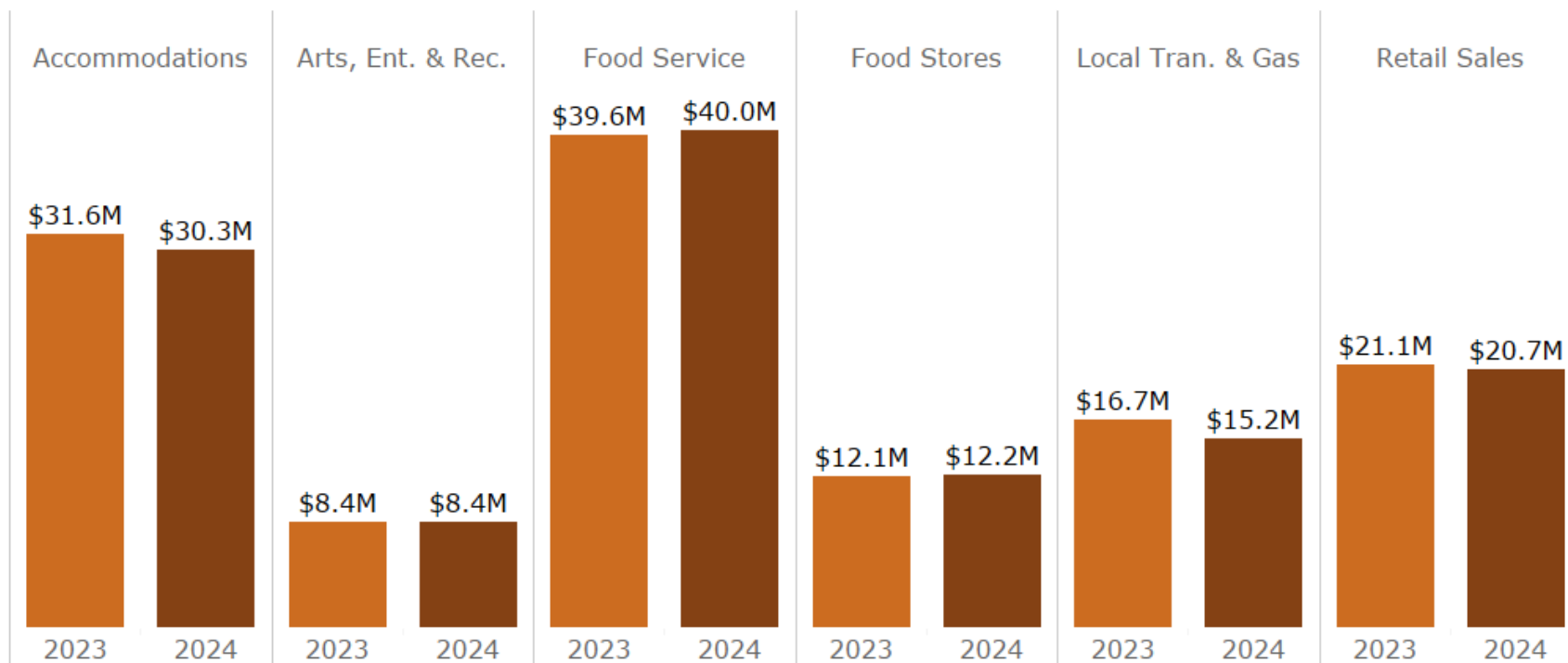
Hotel, Motel, STVR: 53.4%
Private Home: 16.5%
Vacation Home: 15.4%
Day Travel: 9.0%
Campground: 5.8%



Source: Arizona Travel Impacts, Dean Runyan Associates

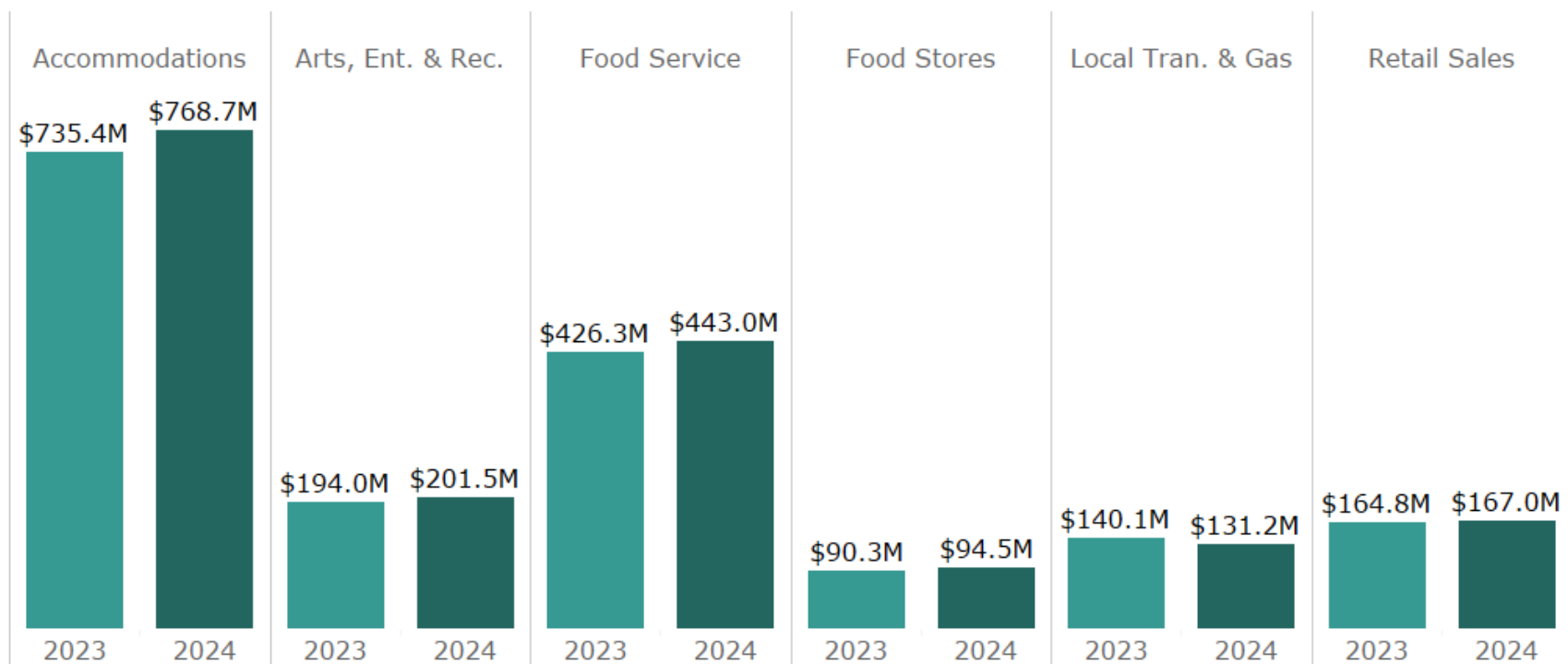
* STVR stands for Short-Term Vacation Rental

Spend by Commodity: Apache County



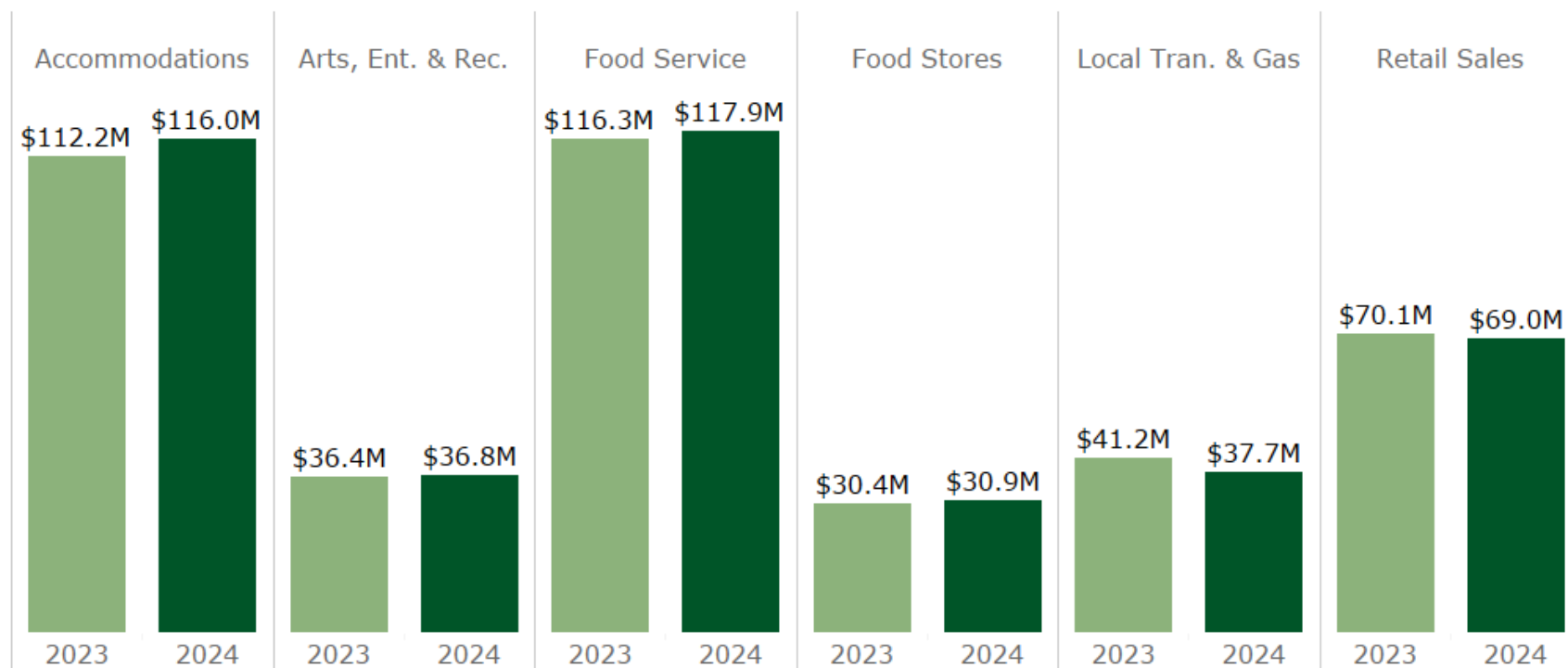
Source: Arizona Travel Impacts, Dean Runyan Associates

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



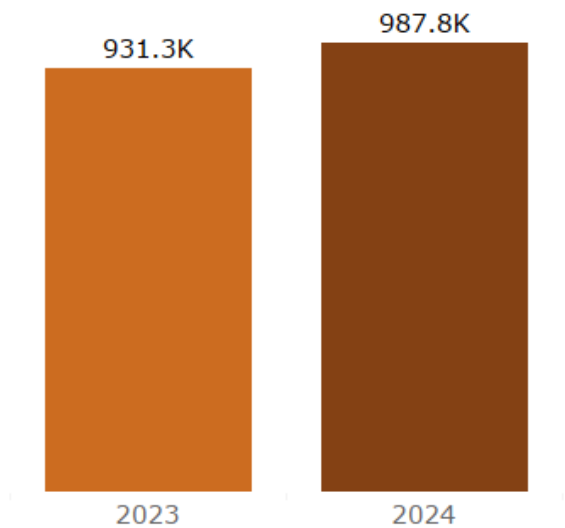
Short-Term Rentals: Northern Region



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

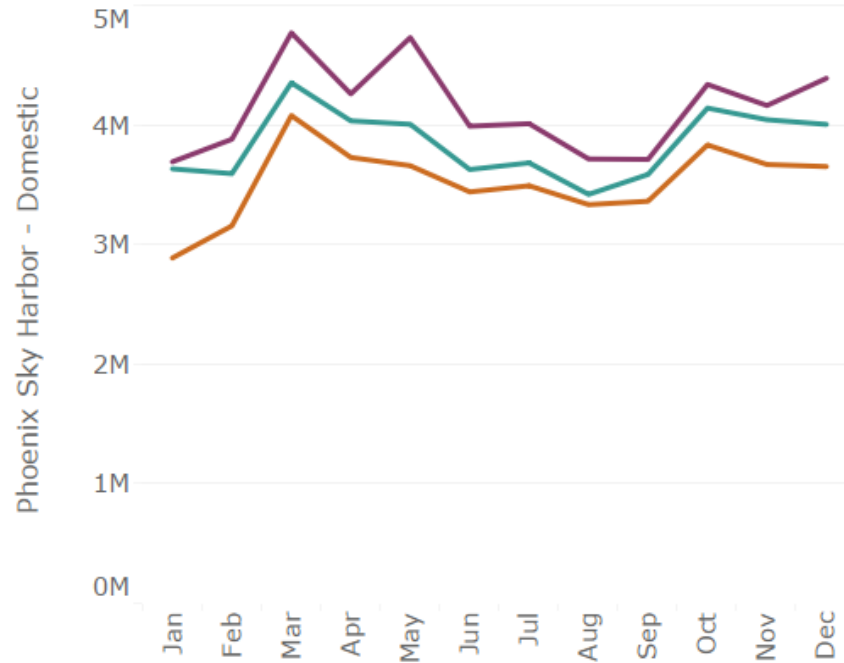


Airport Passengers: Northern Region

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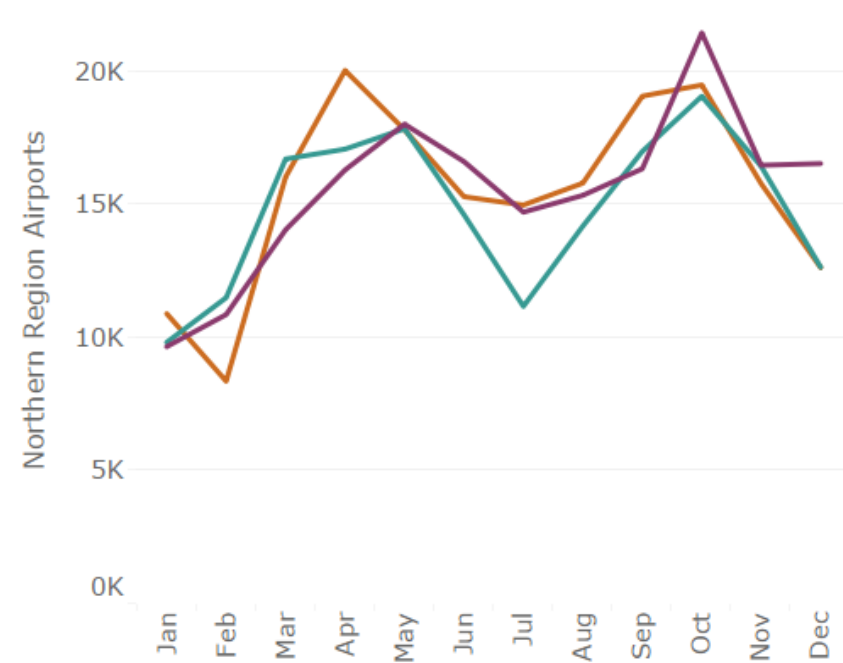
Airport Hub

2022 2023 2024



Region Airports

2022 2023 2024



Flagstaff Pulliam, Page Municipal, & Show Low Regional

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

National & State Parks

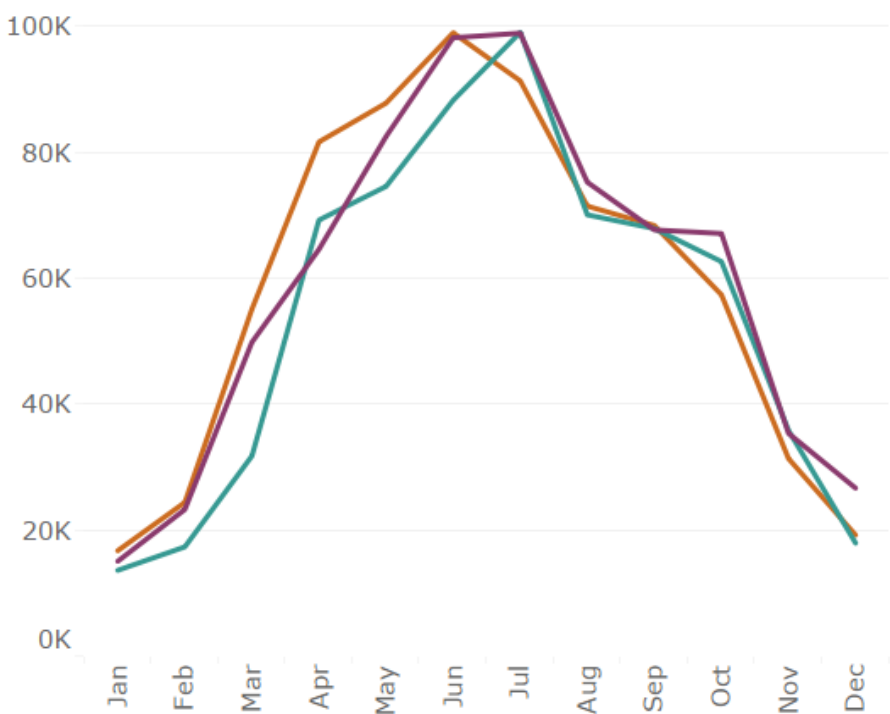


State Parks: Northern Region



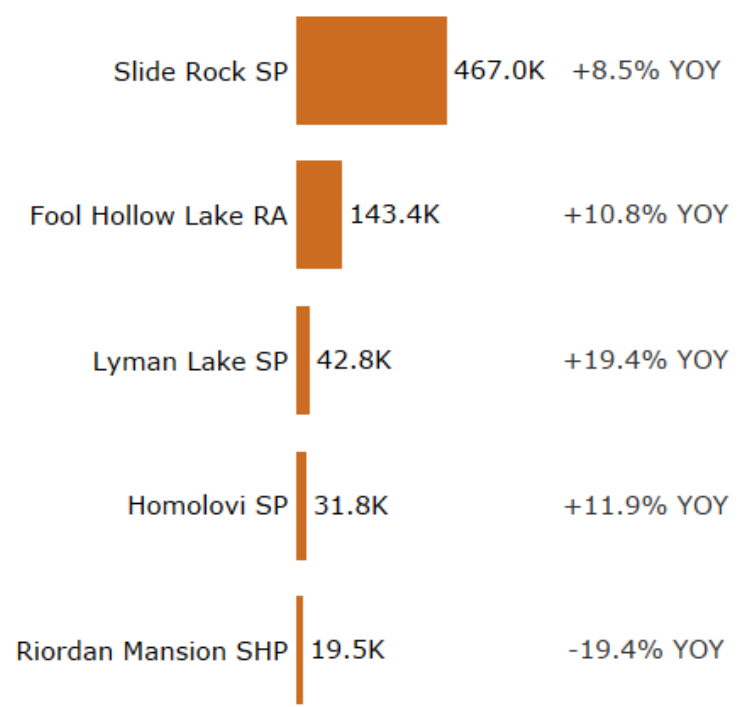
State Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change



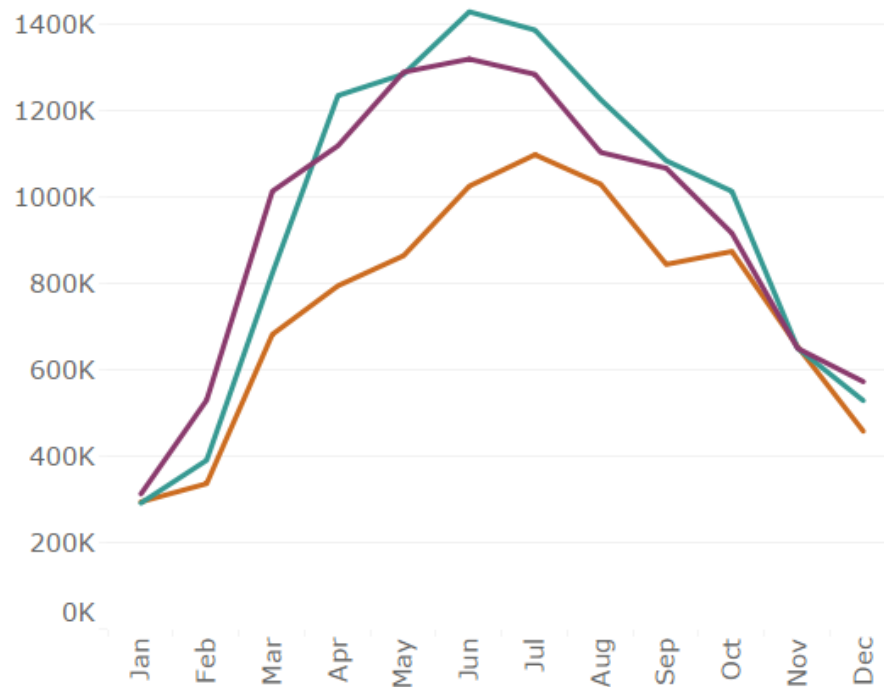
Source: Northern Arizona University, Arizona State Parks

National Parks: Northern Region



National Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change

Grand Canyon NP	4.9M	+3.9% YOY
Glen Canyon NRA	4.7M	-9.2% YOY
Petrified Forest NP	559.3K	+7.4% YOY
Canyon de Chelly NM	387.4K	+16.2% YOY
Wupatki NM	220.2K	+2.1% YOY
Walnut Canyon NM	187.2K	+22.7% YOY
Sunset Crater Volcano NM	73.3K	-10.1% YOY
Navajo NM	58.4K	+32.3% YOY
Hubbell Trading Post NHS	46.4K	-14.3% YOY

Source: Northern Arizona University, National Park Service

Gross Sales

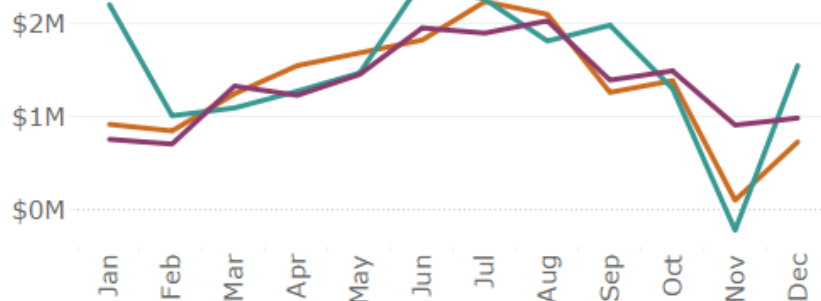


Gross Sales: Apache County



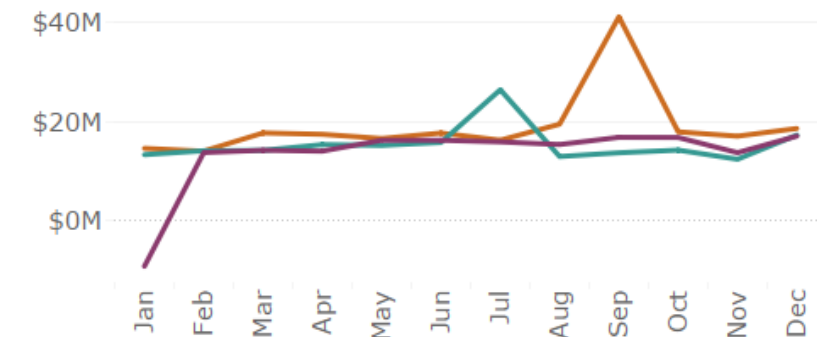
Hotel/Motel

2022 2023 2024



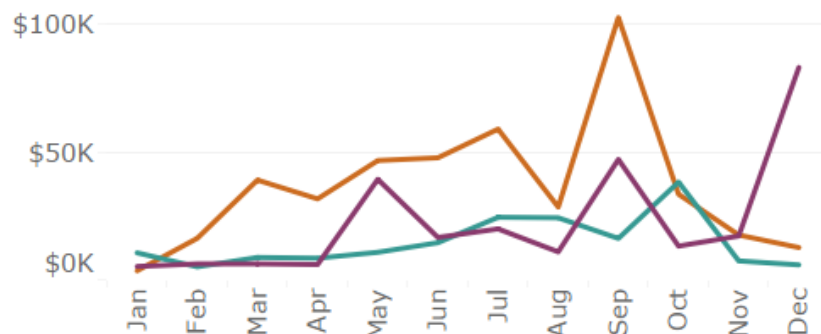
Retail

2022 2023 2024



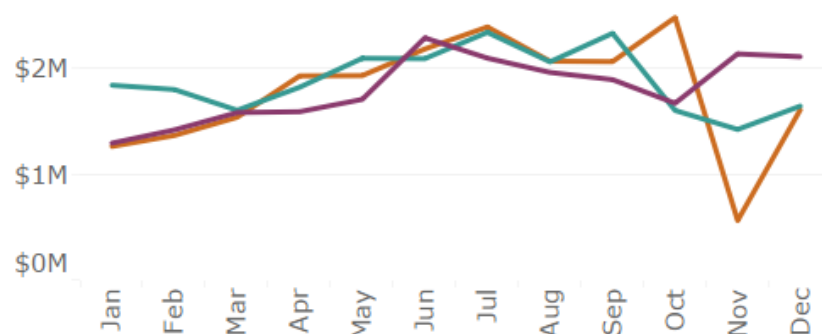
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



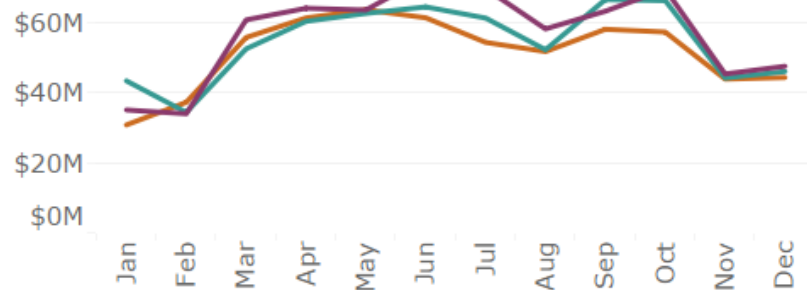
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Coconino County



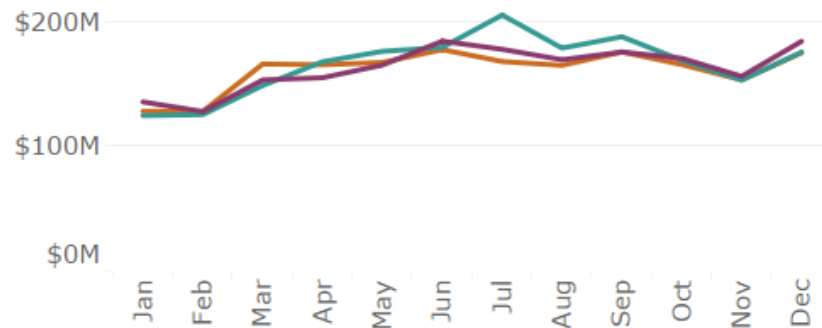
Hotel/Motel

2022 2023 2024



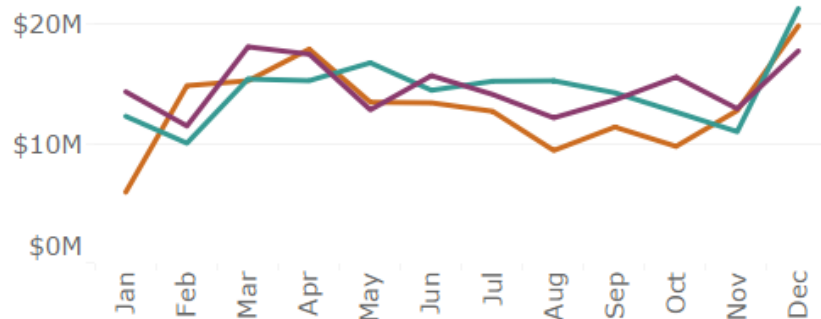
Retail

2022 2023 2024



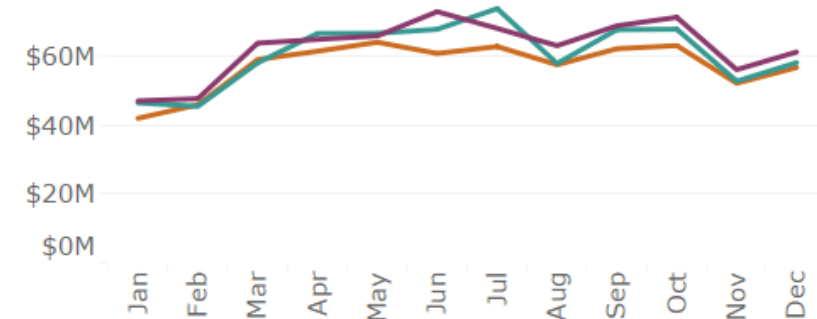
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



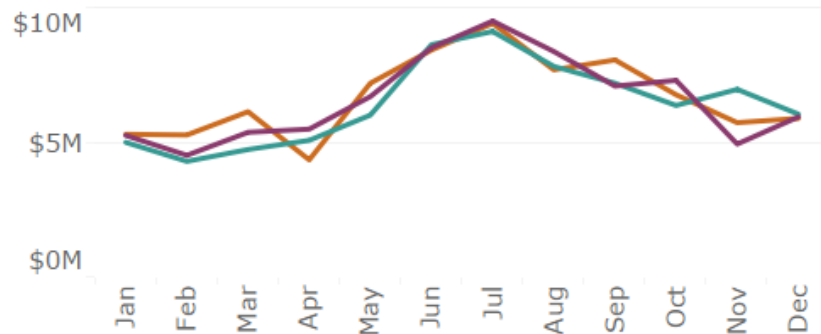
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Navajo County



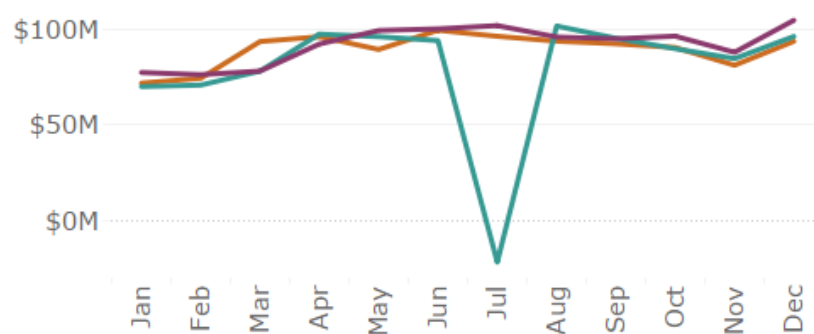
Hotel/Motel

2022 2023 2024



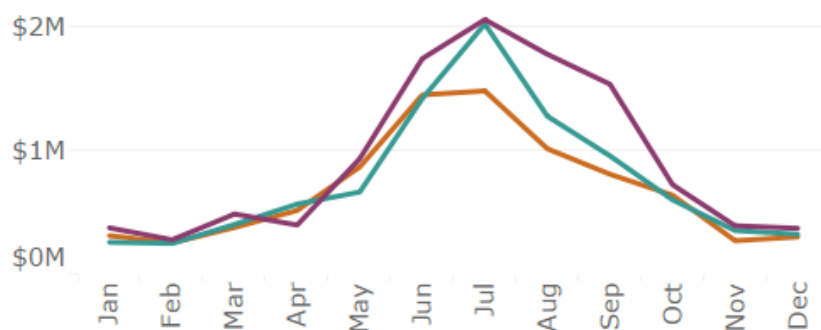
Retail

2022 2023 2024



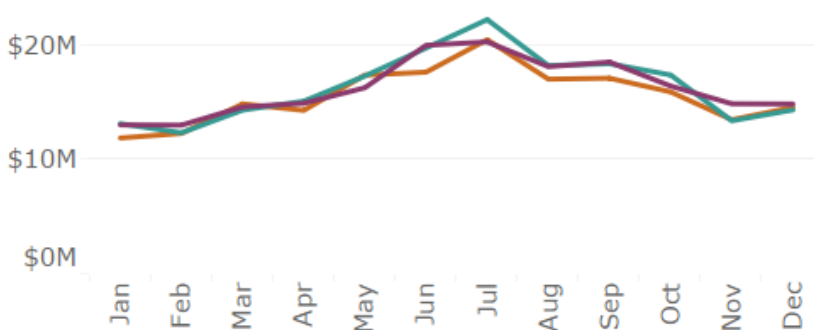
Amusement

2022 2023 2024



Restaurant

2022 2023 2024

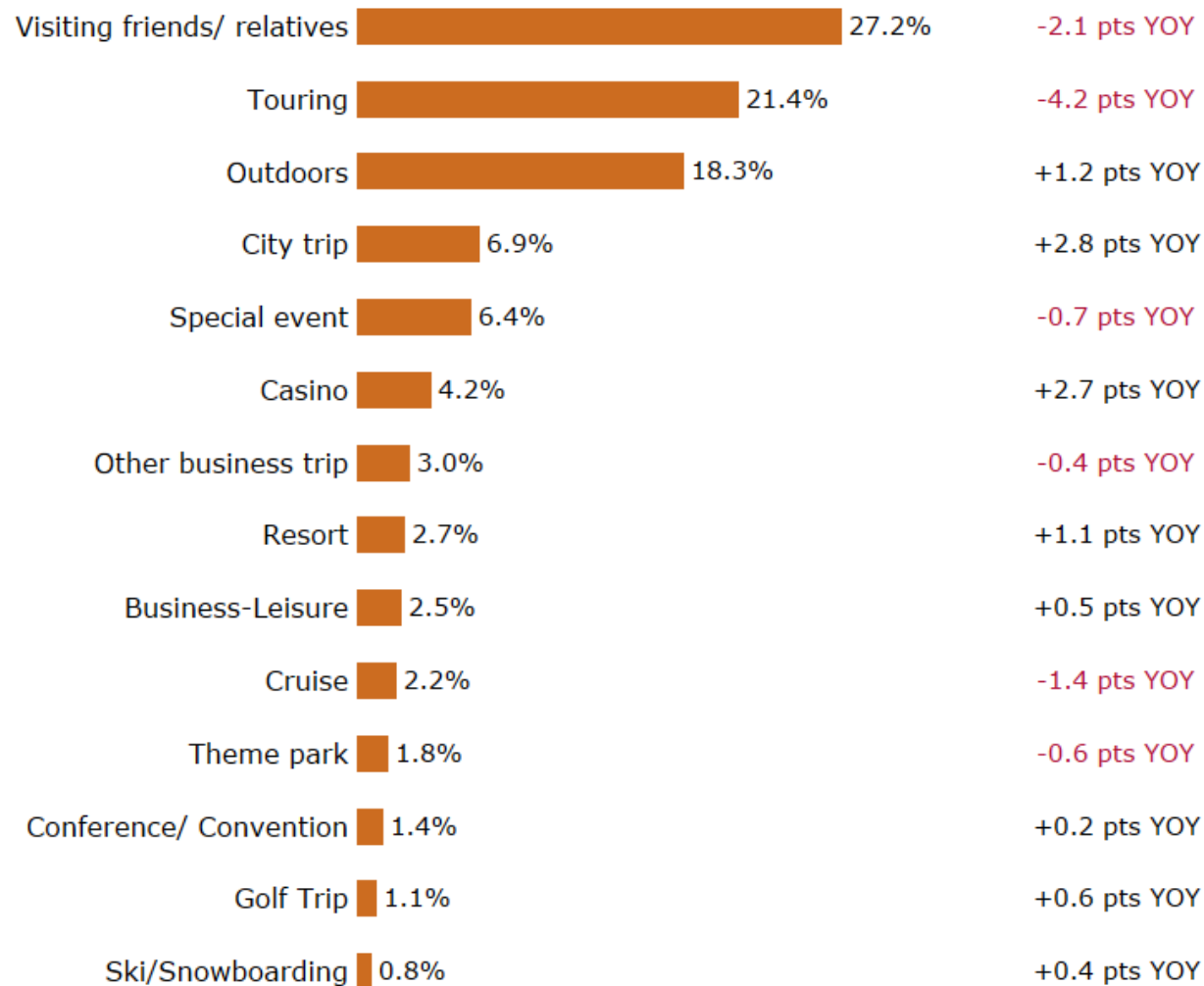


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Visitor Summary

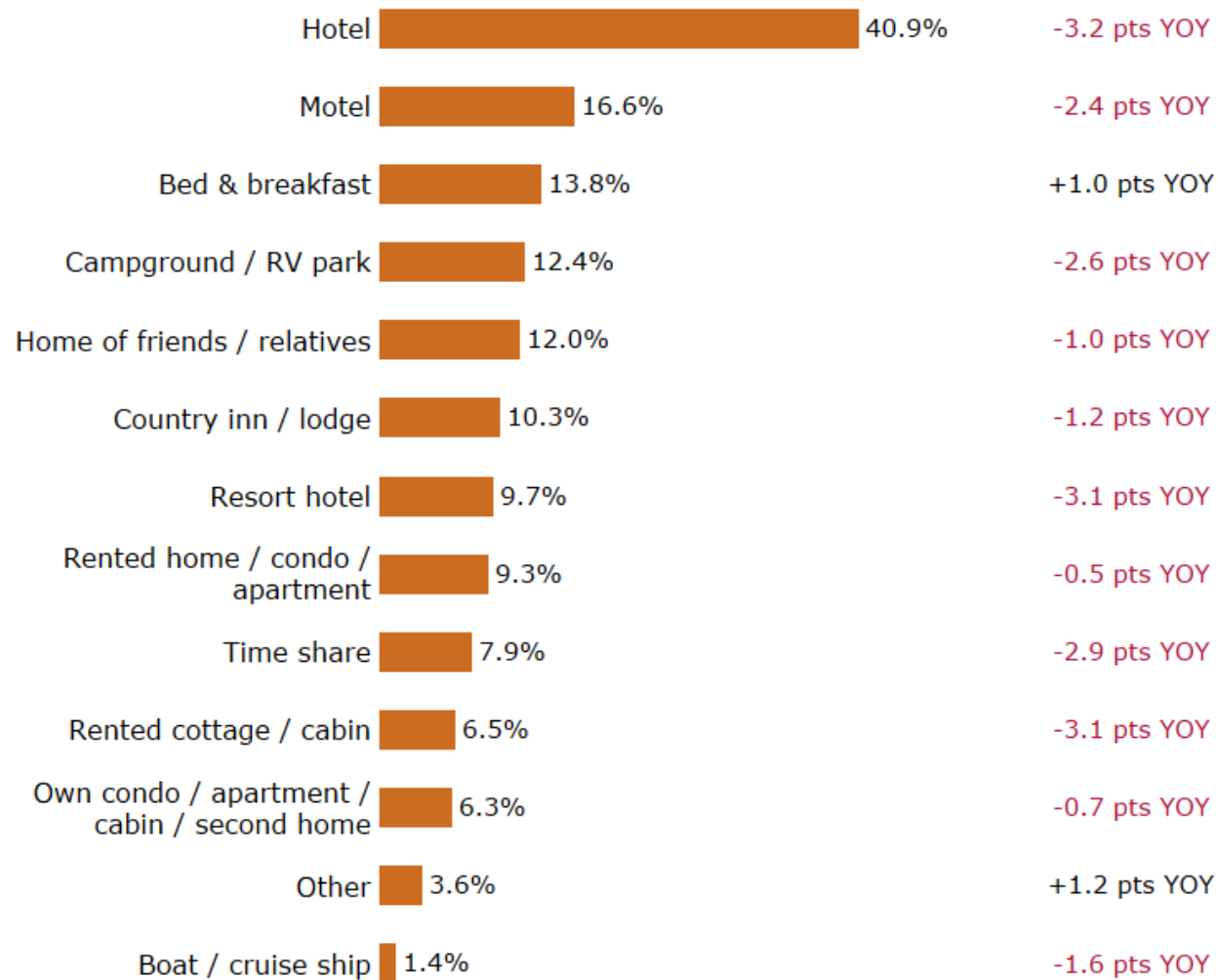


2024 Main Purpose of Trip: Northern Region



Source: Longwoods

2024 Accommodation: Northern Region



Source: Longwoods

2024 Visitor Summary: Apache County



83.7%
Overnight Visitor Share

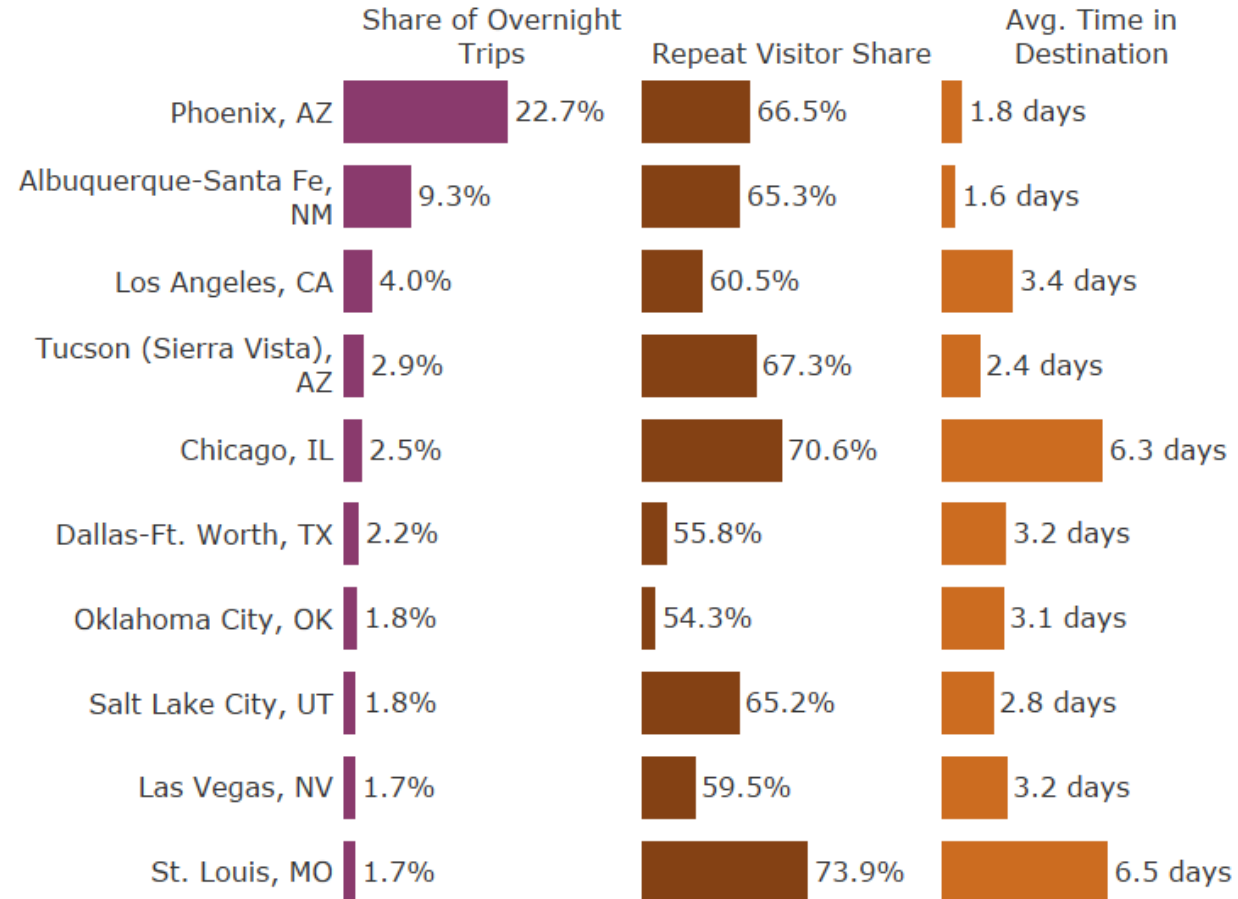


63.8%
Repeat Visitor Share



3.3 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

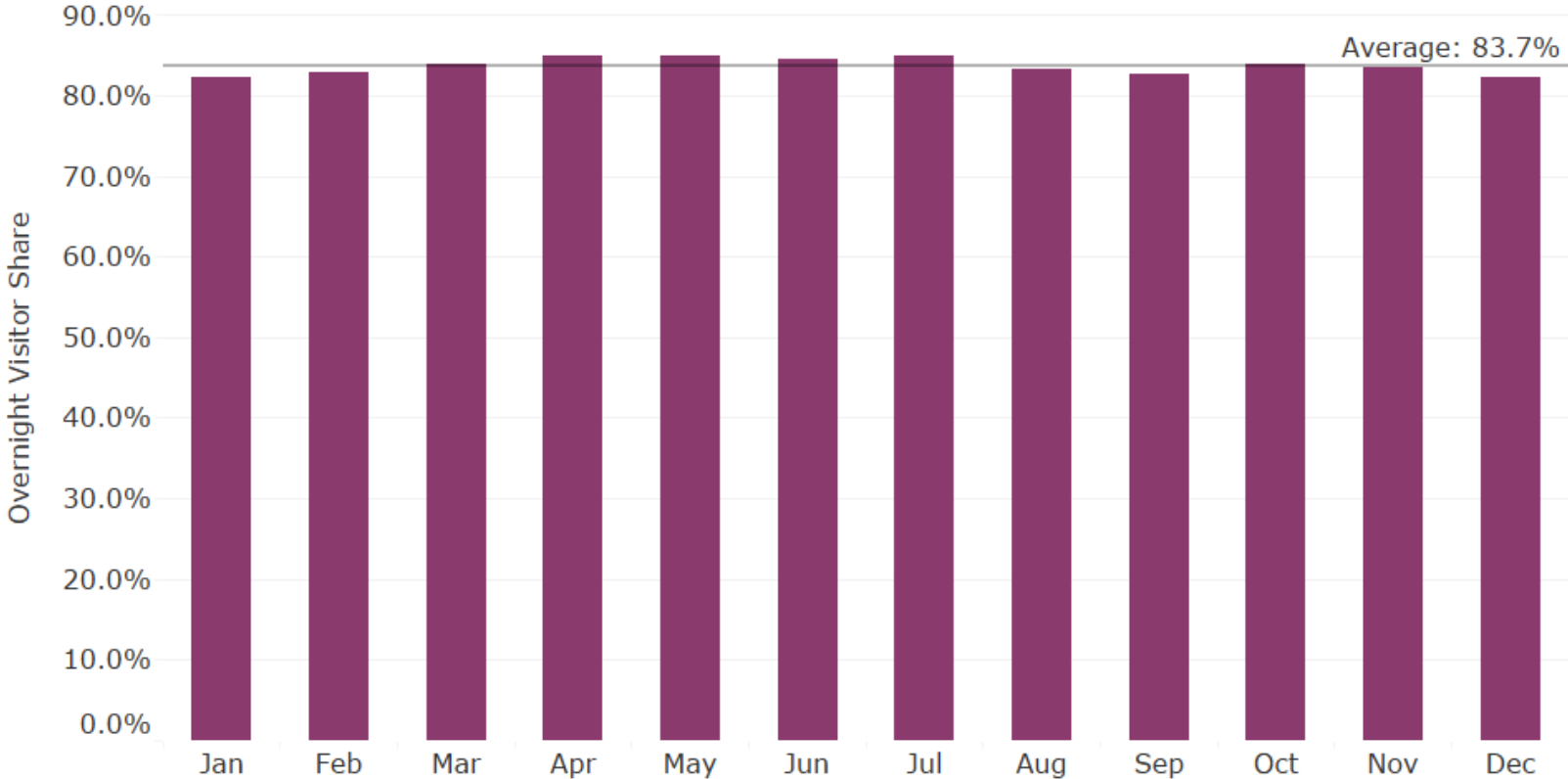


Source: Azira

Overnight Visitor Share: Apache County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Coconino County



80.2%
Overnight Visitor Share



67.4%
Repeat Visitor Share



2.7 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

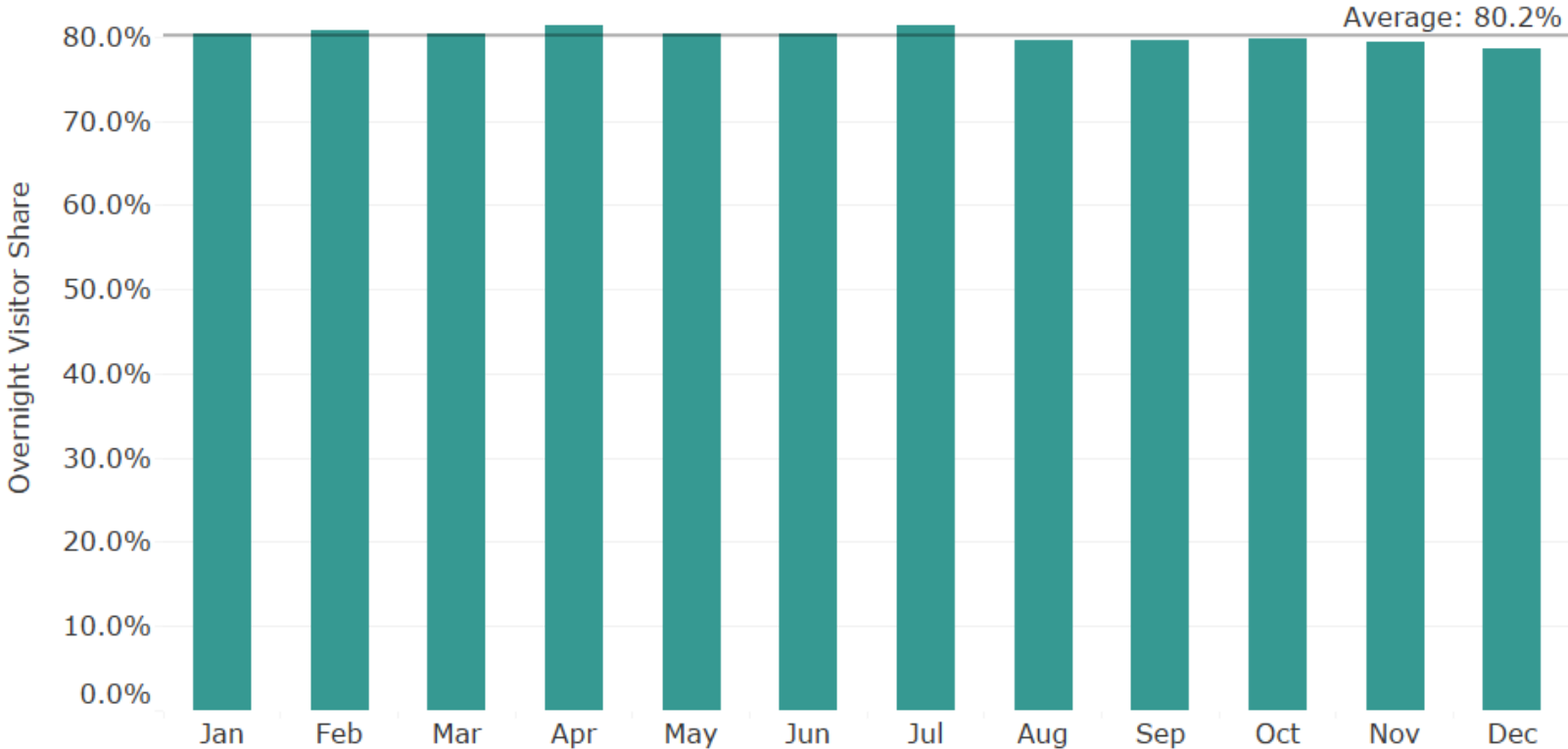
	Share of Overnight Trips	Repeat Visitor Share	Avg. Time in Destination
Phoenix, AZ	28.5%	67.9%	1.2 days
Los Angeles, CA	5.2%	65.9%	2.5 days
Salt Lake City, UT	4.2%	69.5%	1.9 days
Albuquerque-Santa Fe, NM	4.2%	66.3%	2.4 days
Tucson (Sierra Vista), AZ	3.1%	69.4%	2.3 days
Las Vegas, NV	2.7%	59.9%	1.3 days
Dallas-Ft. Worth, TX	1.9%	66.0%	2.5 days
Chicago, IL	1.9%	74.3%	6.1 days
Denver, CO	1.7%	67.1%	2.5 days
Houston, TX	1.4%	73.4%	5.9 days

Source: Azira

Overnight Visitor Share: Coconino County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Navajo County



83.8%
Overnight Visitor Share

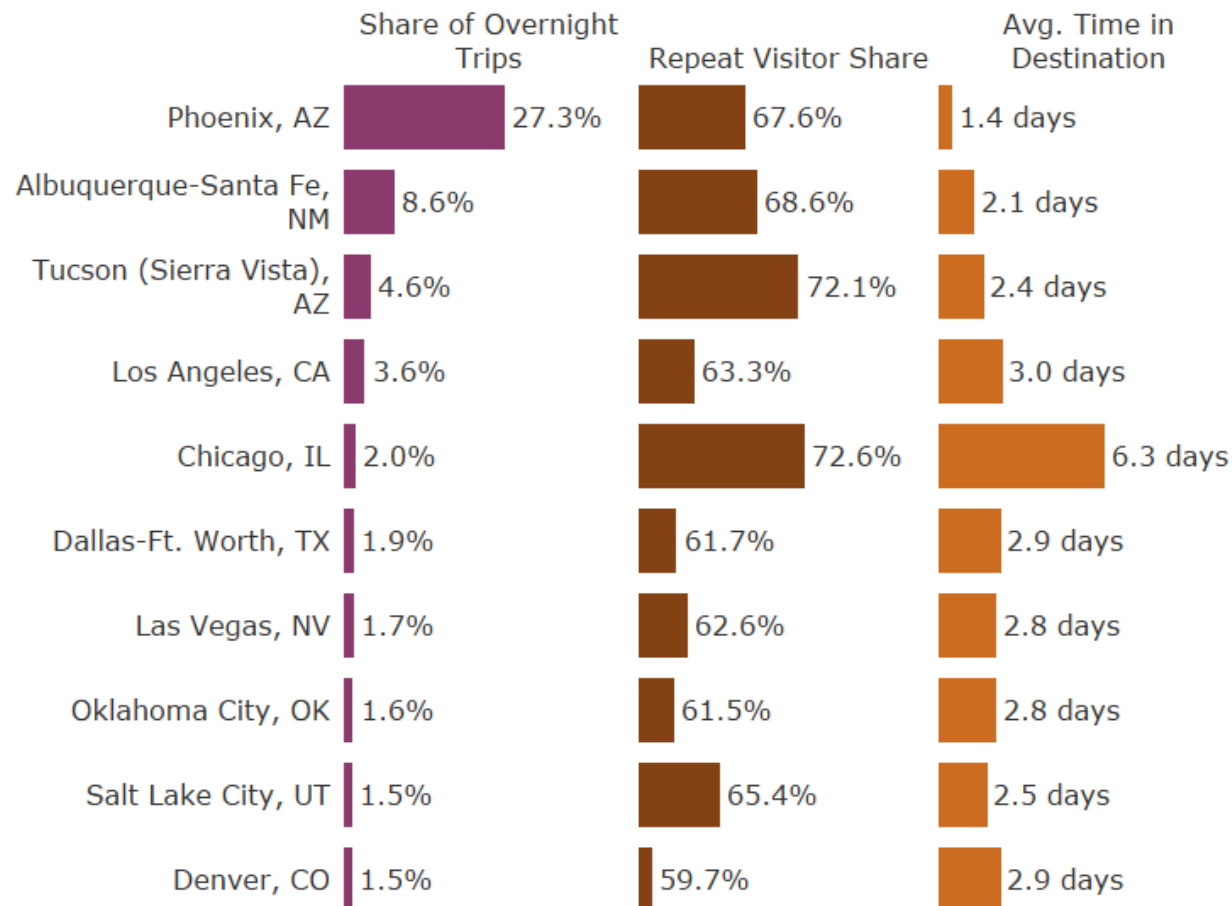


67.0%
Repeat Visitor Share



3.0 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

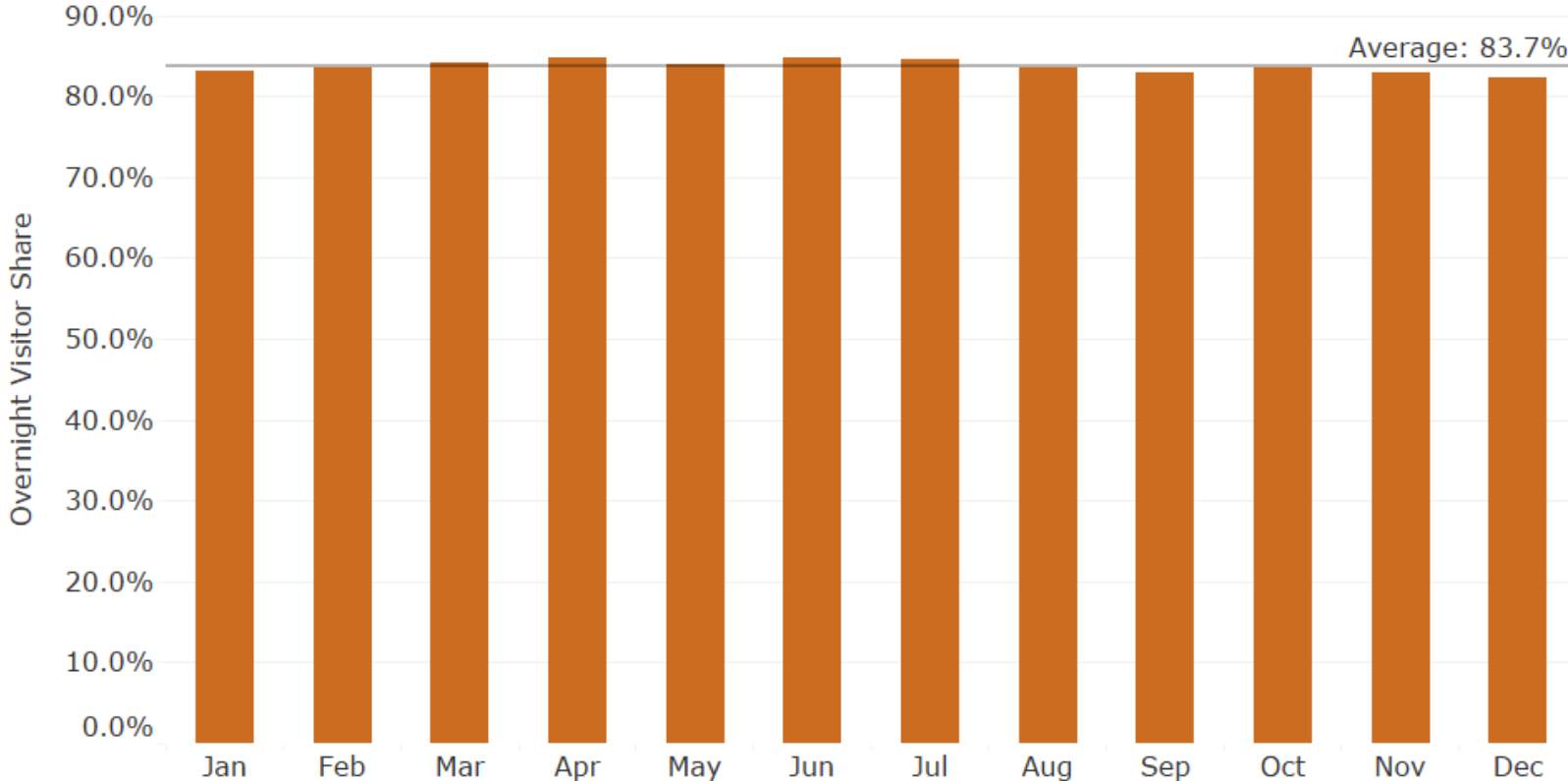


Source: Azira

Overnight Visitor Share: Navajo County



2024 Overnight Visitor Share Monthly Trend



Source: Azira