

PHOENIX & CENTRAL REGION

TRAVEL RESEARCH TRENDS



Arizona Travel Impact



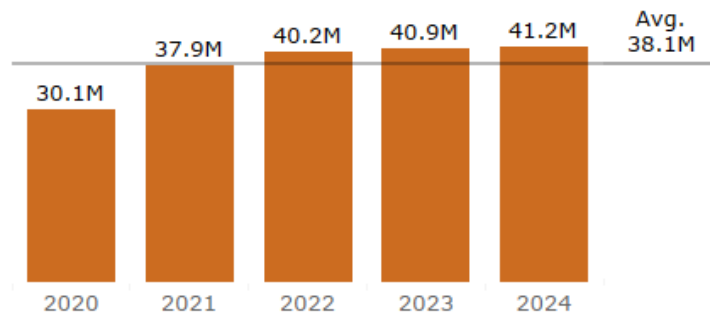
State Domestic Travel Impact



2024 Total Overnight Visitors

41.2M

+0.7% YOY | +1.3% vs. 2019



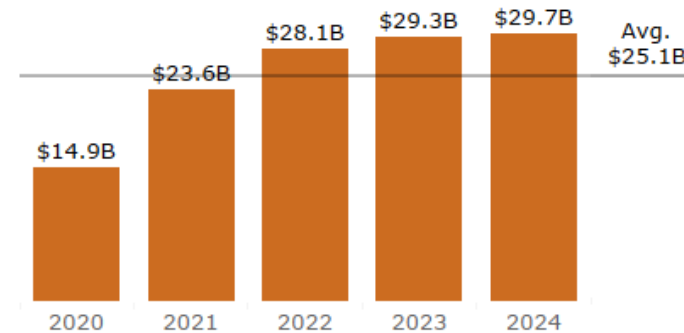
Source: Tourism Economics



2024 Total Spending

\$29.7B

+1.4% YOY | +16.2% vs. 2019



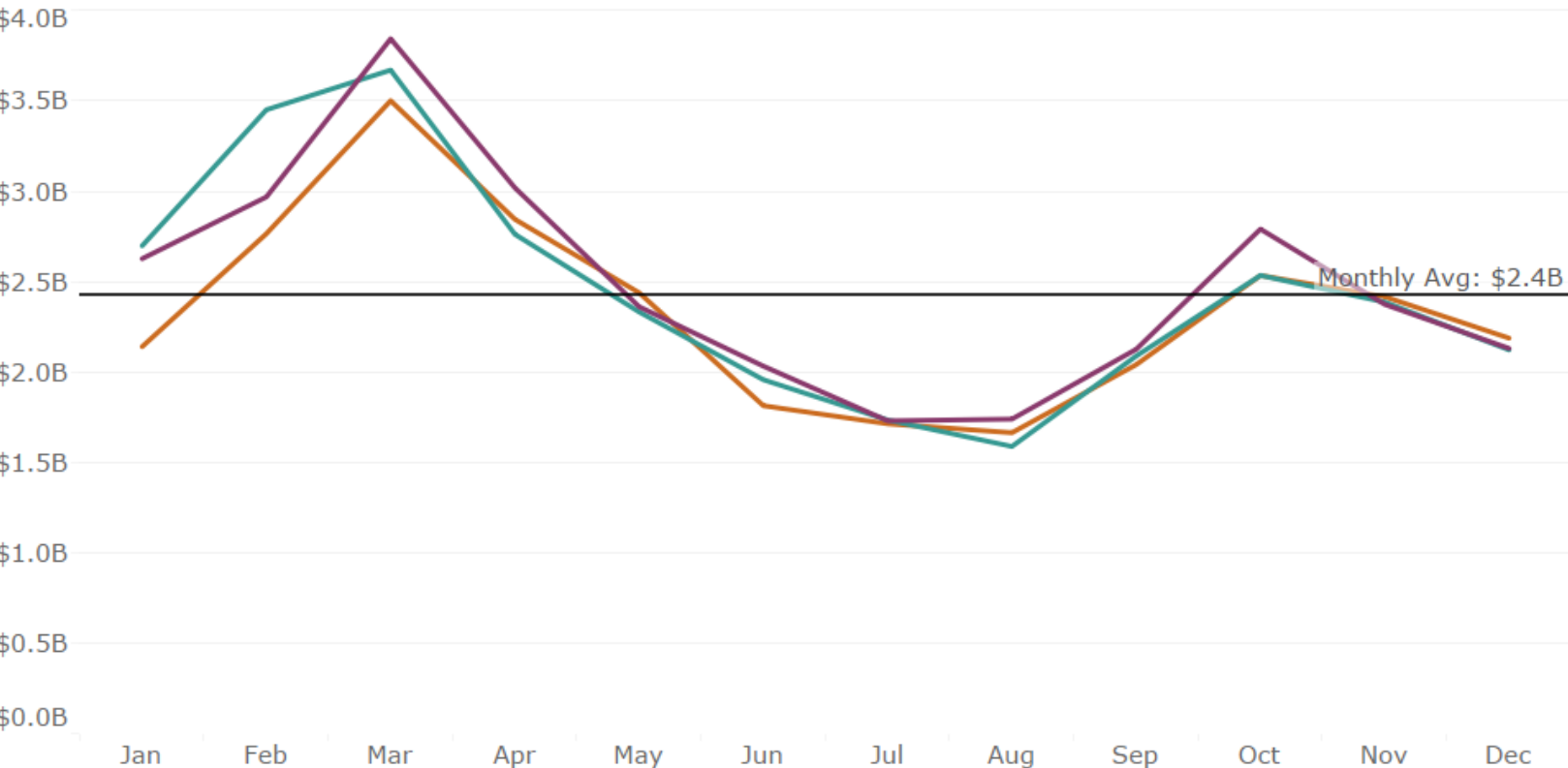
Source: Dean Runyan Associates

State Domestic Travel Impact



Monthly Travel Spending Trend

2022 2023 2024



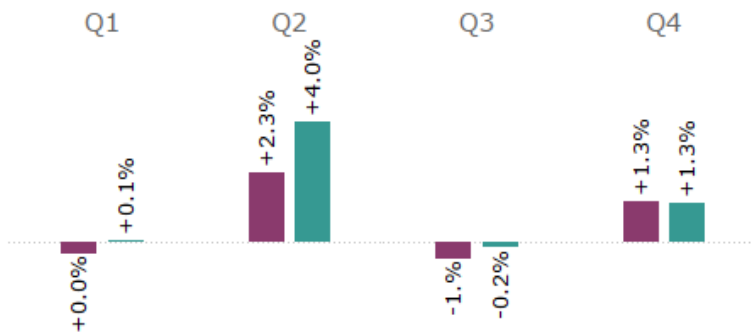
Source: Dean Runyan Associates

State Domestic Travel Impact

III

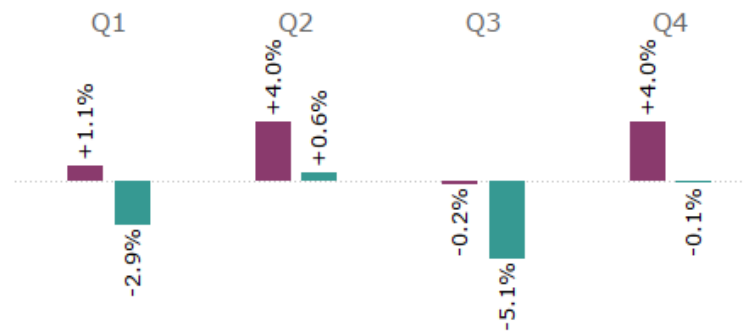
All Overnight Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



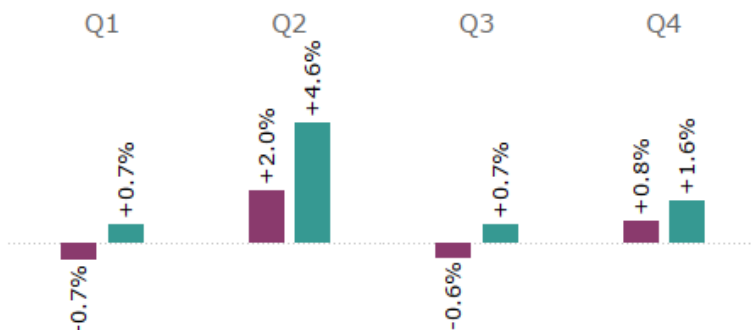
Overnight Business Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



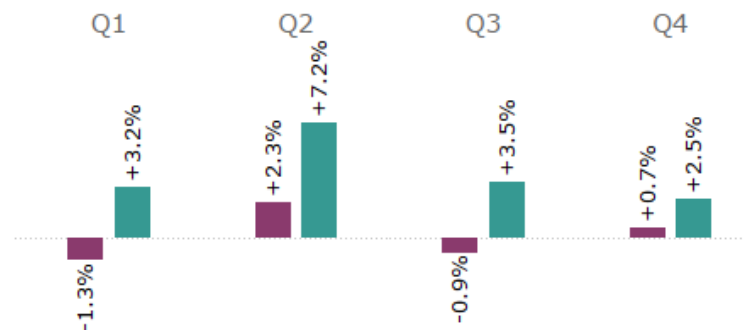
Overnight Leisure Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



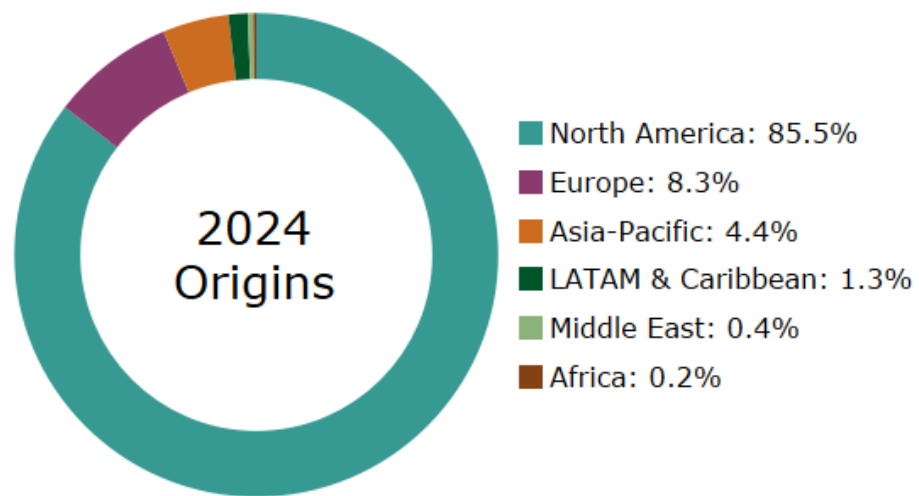
Overnight Resident Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019

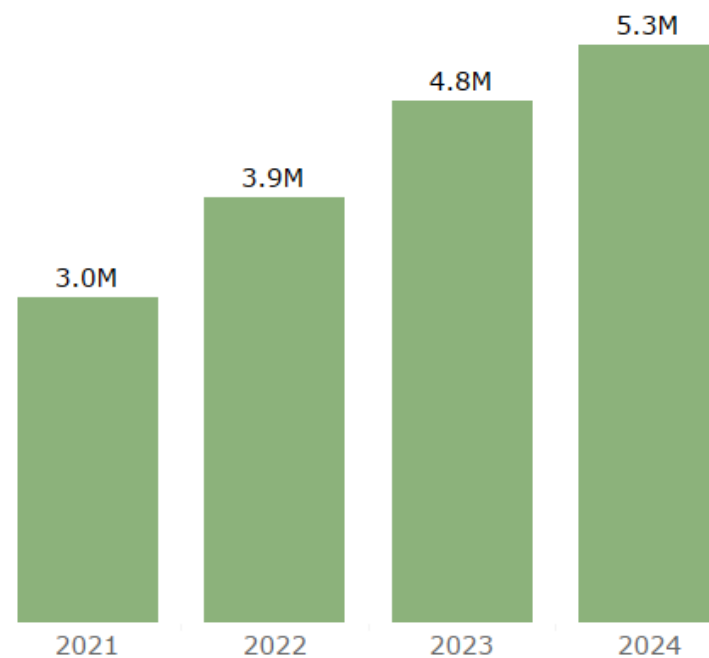


Source: Tourism Economics

State International Travel Impact



Annual International Overnight Visits
Last 4 years



Source: Tourism Economics International State Travel

Travel Impact by County

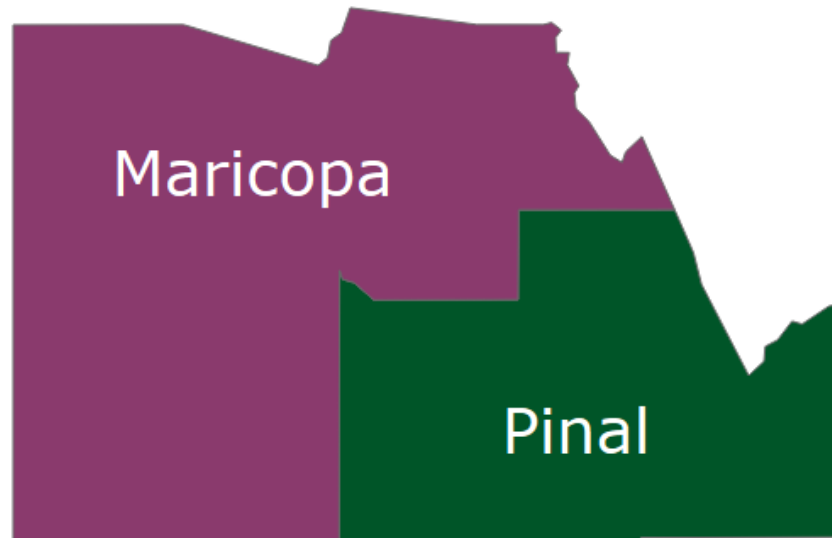


2024 Total Spending: Phoenix & Central Region



Maricopa
\$18.5B
+1.3% YOY

Pinal
\$981.6M
+3.7% YOY

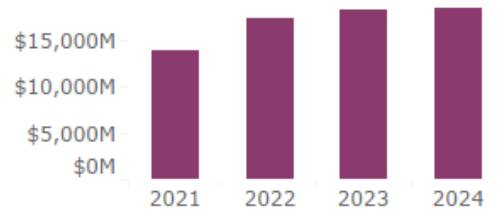


Source: Arizona Travel Impacts, Dean Runyan Associates

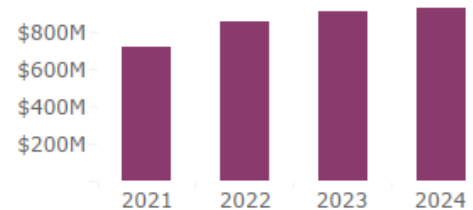
Travel Impacts: Maricopa County



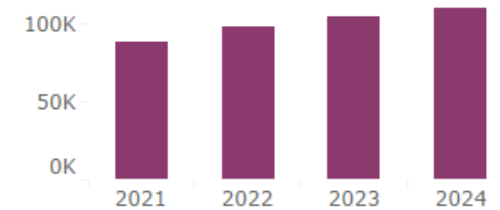
Direct Travel Spending
+\$245.5M
+1.3% YOY



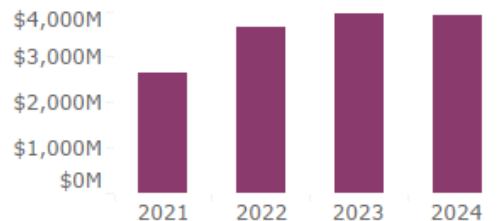
Local Tax Receipts
+\$18.1M
+2.0% YOY



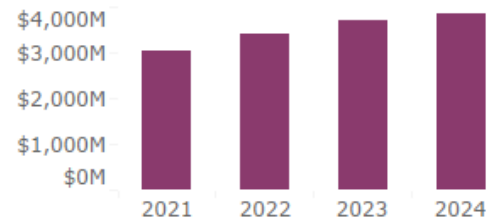
Employment
+5.6K
+5.4% YOY



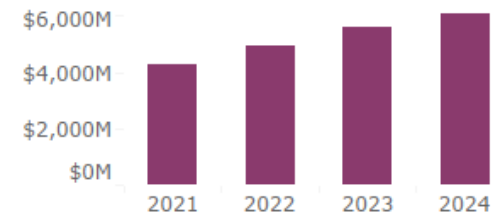
Accommodations Spending
-\$16.1M
-0.4% YOY



Food Service Spending
+\$137.0M
+3.7% YOY



Earnings
+\$449.4M
+8.0% YOY

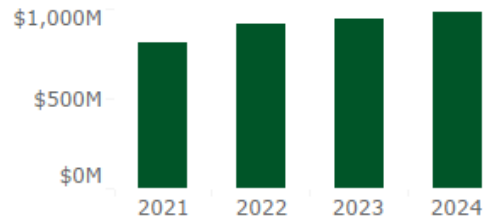


Source: Arizona Travel Impacts, Dean Runyan Associates

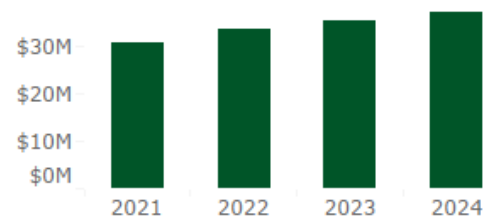
Travel Impacts: Pinal County



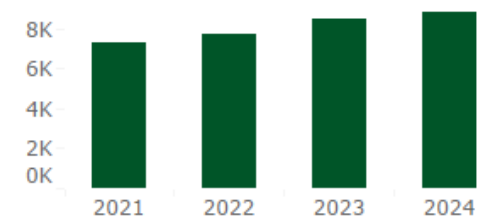
Direct Travel Spending
+\$35.1M
+3.7% YOY



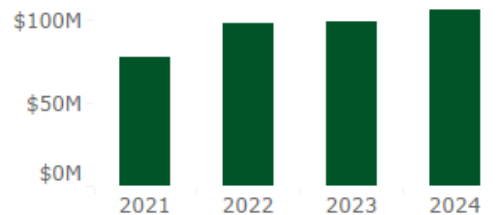
Local Tax Receipts
+\$1.8M
+5.2% YOY



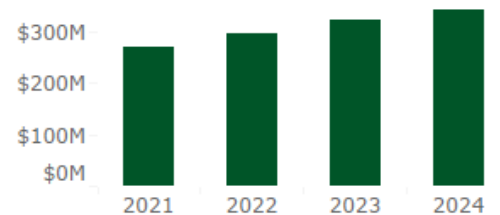
Employment
+350
+4.1% YOY



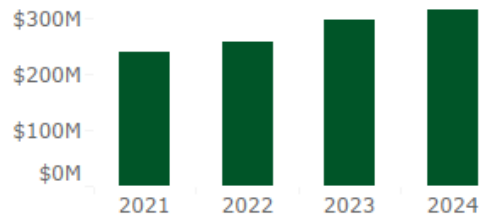
Accommodations Spending
+\$6.4M
+6.5% YOY



Food Service Spending
+\$20.5M
+6.4% YOY

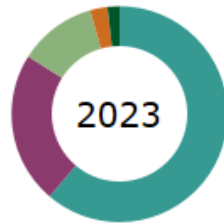
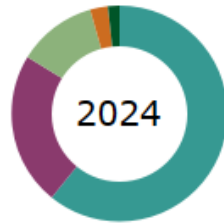


Earnings
+\$18.9M
+6.4% YOY



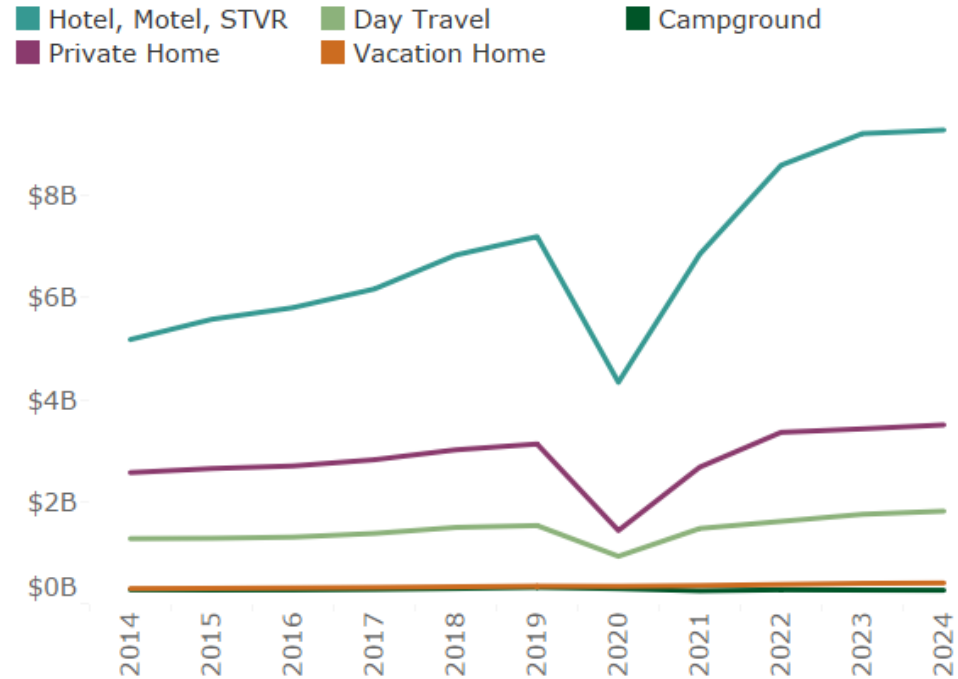
Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Accommodation Type: Maricopa County



Hotel, Motel, STVR: 60.8%
Private Home: 23.0%
Day Travel: 11.9%
Vacation Home: 2.6%
Campground: 1.7%

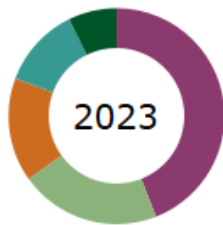
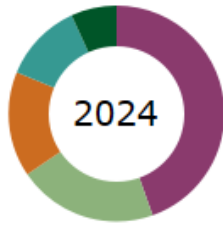
Hotel, Motel, STVR: 61.2%
Private Home: 22.8%
Day Travel: 11.6%
Vacation Home: 2.6%
Campground: 1.8%



Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

Spend by Accommodation Type: Pinal County



Private Home: 44.6%

Day Travel: 20.9%

Vacation Home: 15.8%

Hotel, Motel, STVR: 11.9%

Campground: 6.8%

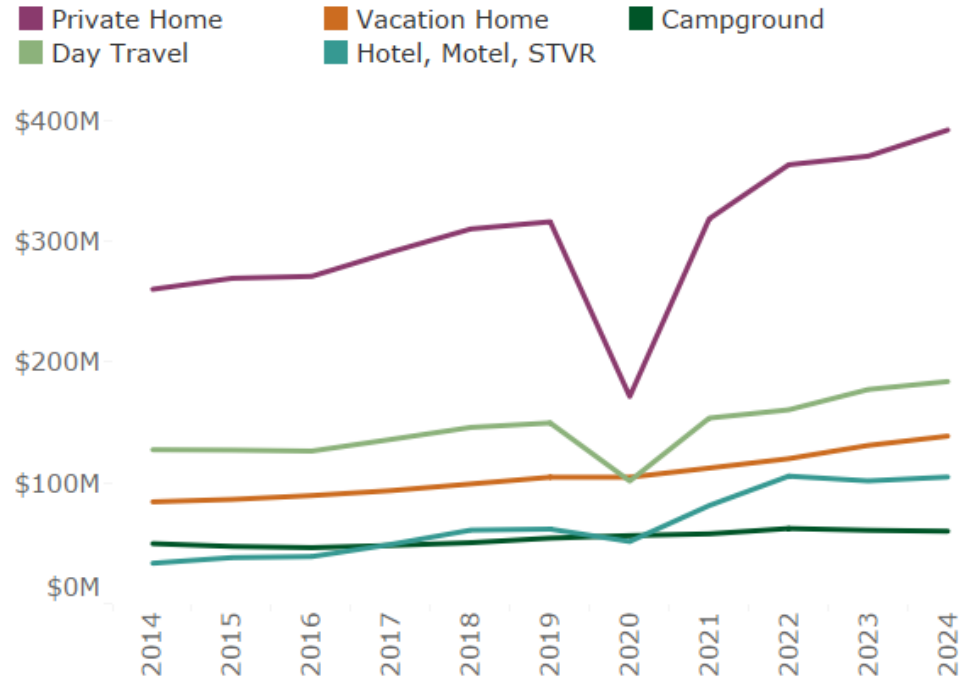
Private Home: 44.0%

Day Travel: 21.1%

Vacation Home: 15.6%

Hotel, Motel, STVR: 12.1%

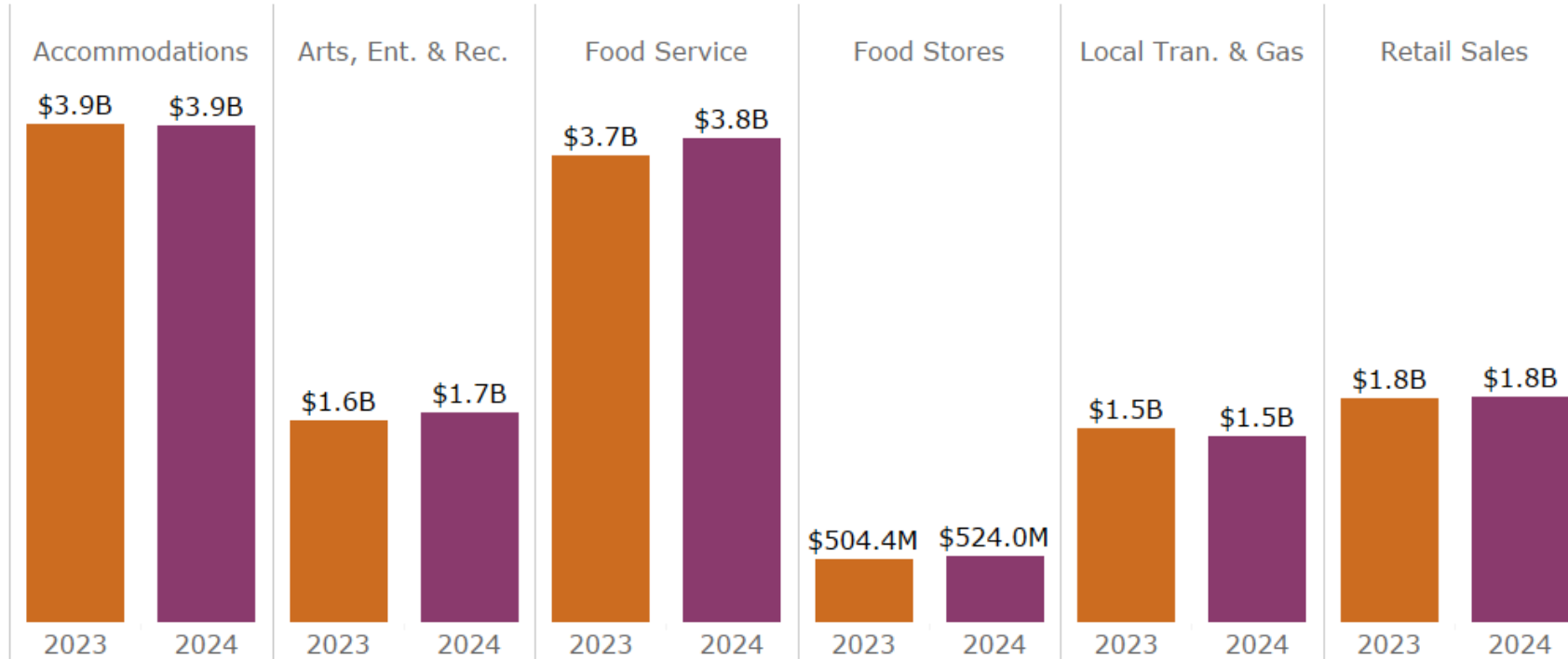
Campground: 7.2%



Source: Arizona Travel Impacts, Dean Runyan Associates

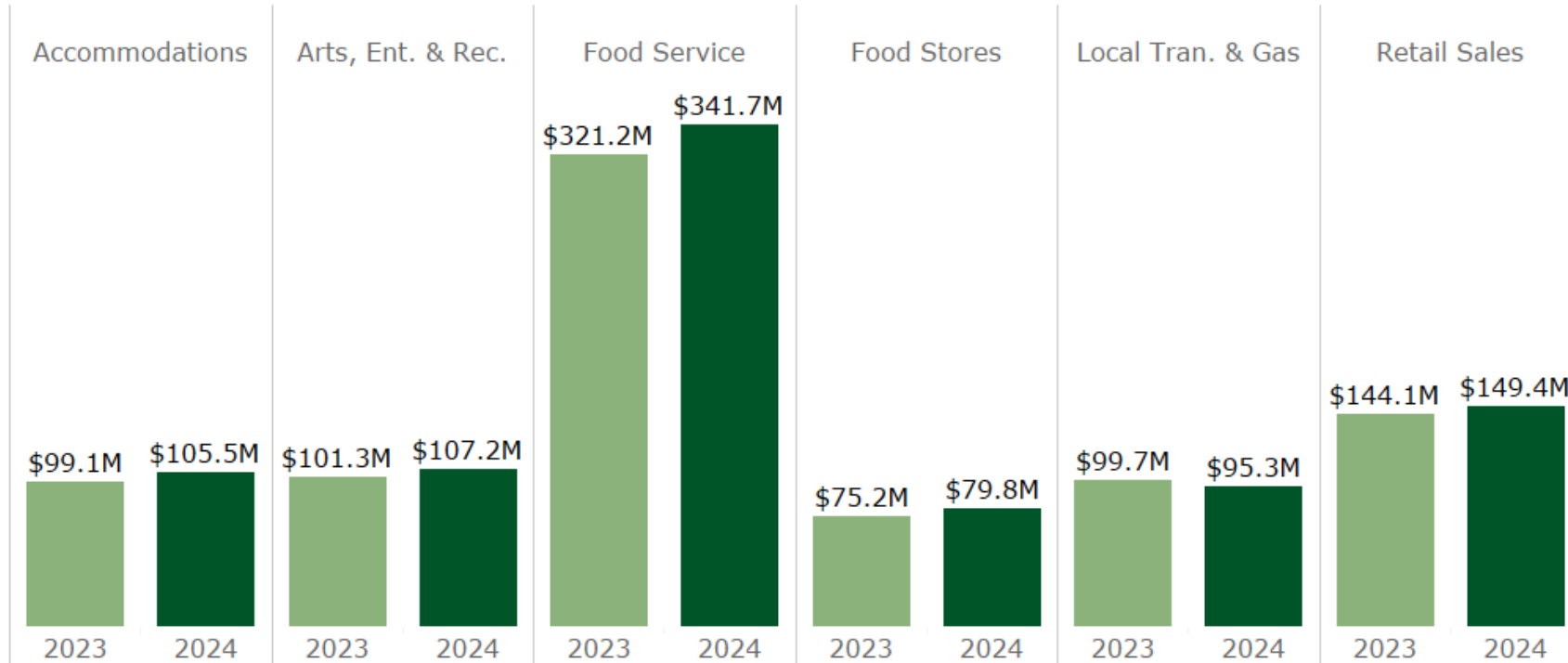
* STVR stands for Short-Term Vacation Rental

Spend by Commodity: Maricopa County



Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Pinal County



Source: Arizona Travel Impacts, Dean Runyan Associates

Lodging Performance

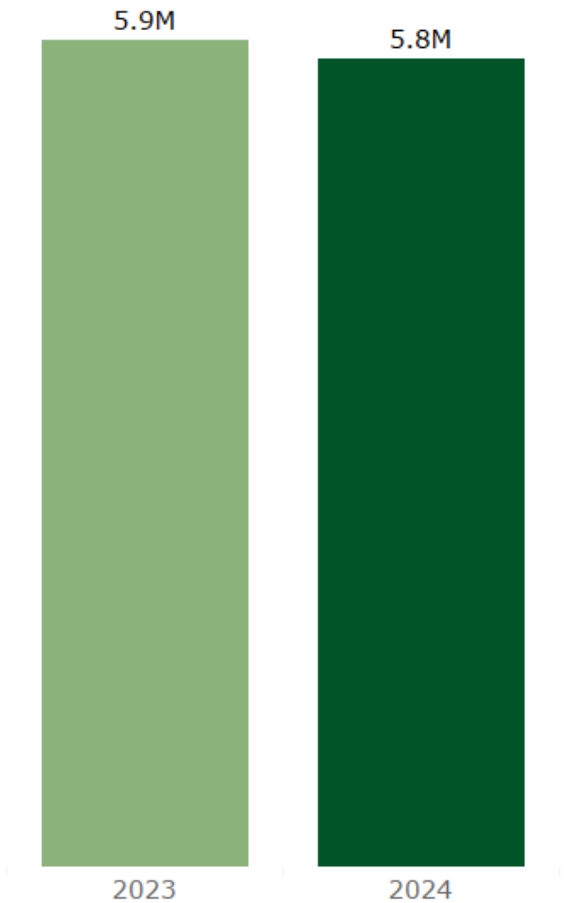


Short-Term Rentals: Phoenix & Central Region



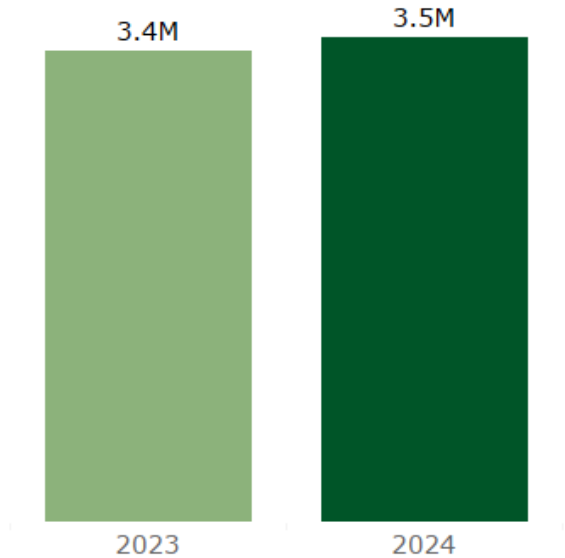
Year-to-Date Supply

Jan - Dec All Properties Available



Year-to-Date Demand

Jan - Dec Nights Sold at All Properties



Source: AirDNA

Airport Passenger Traffic

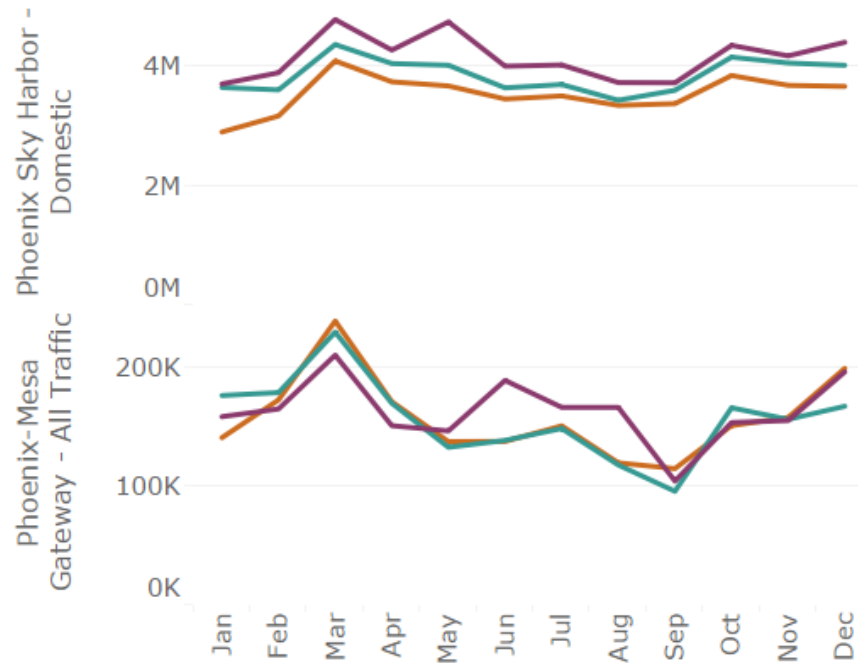


Airport Passengers: Phoenix & Central Region

≡

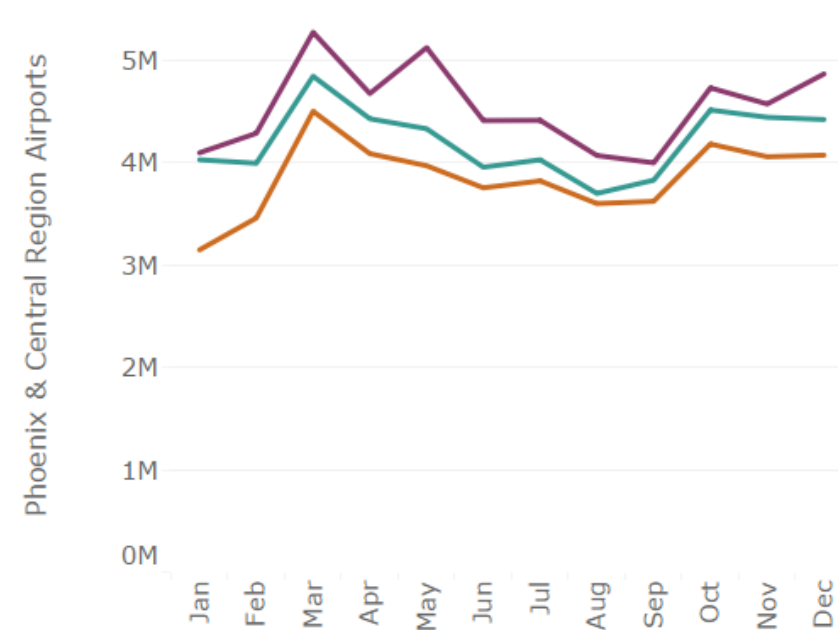
Airport Hub

2022 2023 2024



Region Airports

2022 2023 2024



Phoenix Sky Harbor Domestic & International, Phoenix-Mesa Gateway - All Traffic

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

National & State Parks

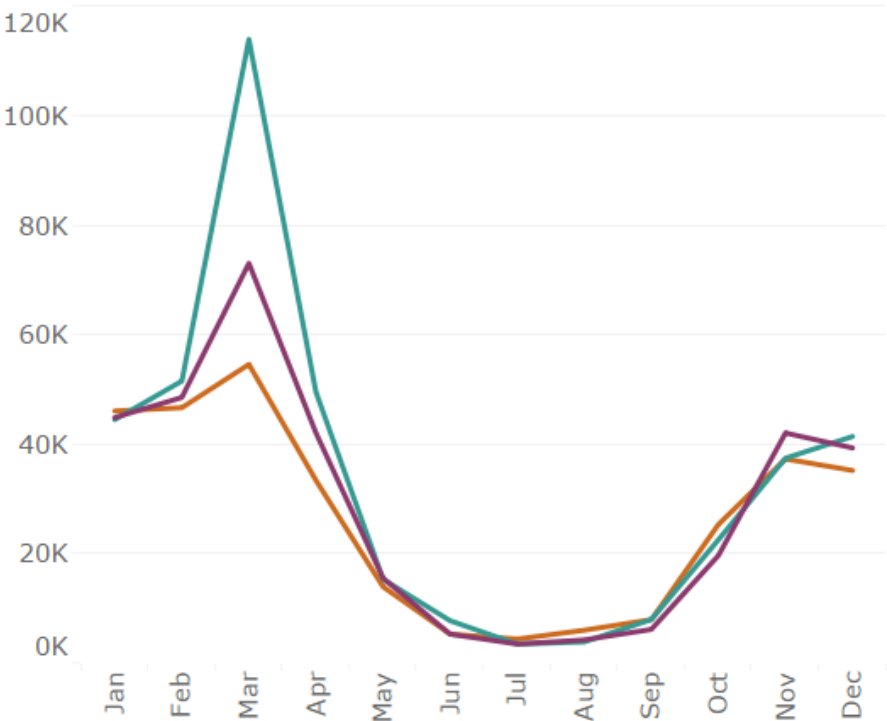


State Parks: Phoenix & Central Region



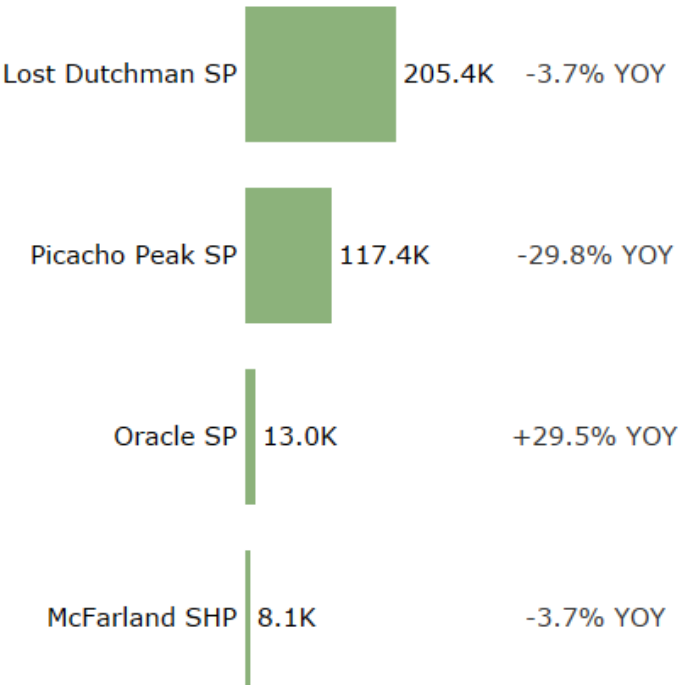
State Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change



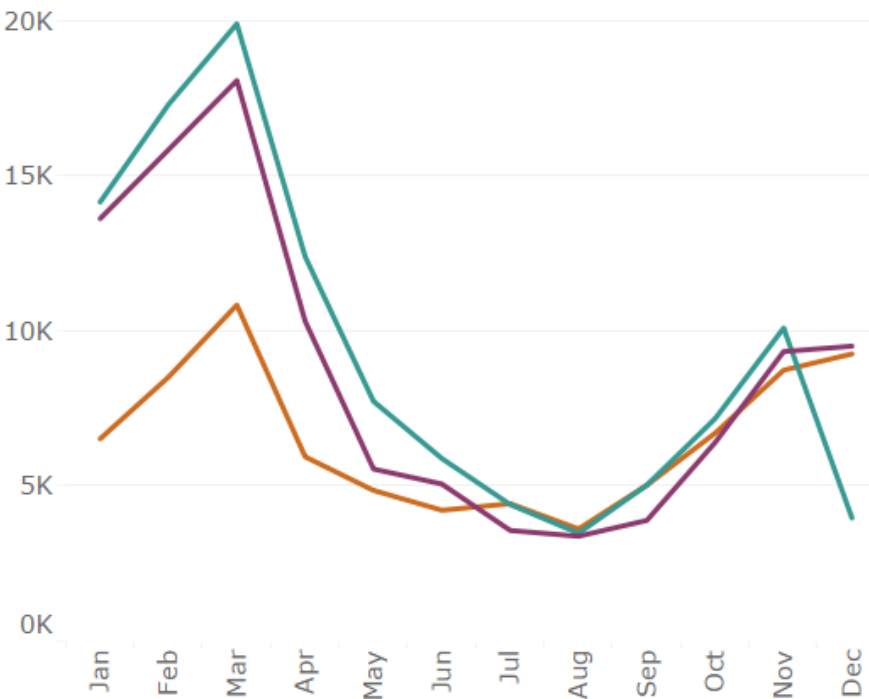
Source: Northern Arizona University, Arizona State Parks

National Parks: Phoenix & Central Region



National Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change



Casa Grande Ruins NM

104,429

-6.3% YOY

Source: Northern Arizona University, National Park Service

Gross Sales

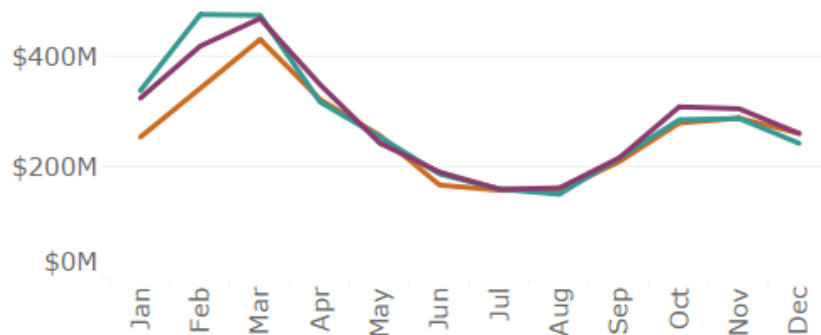


Gross Sales: Maricopa County



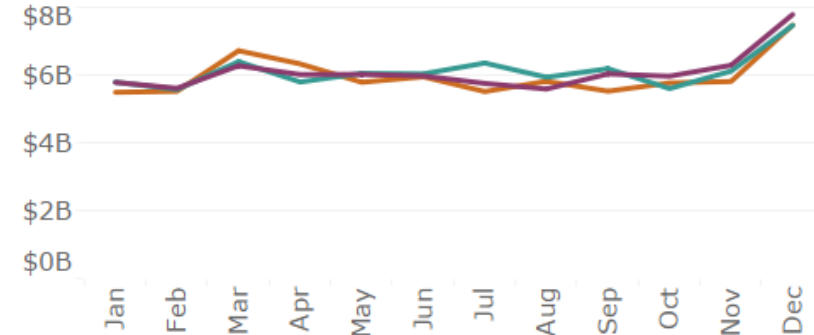
Hotel/Motel

2022 2023 2024



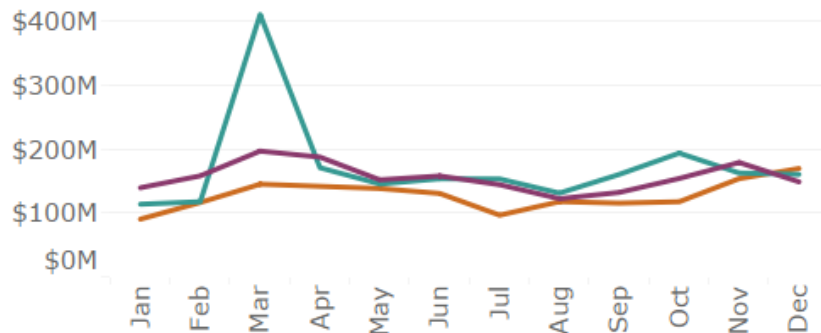
Retail

2022 2023 2024



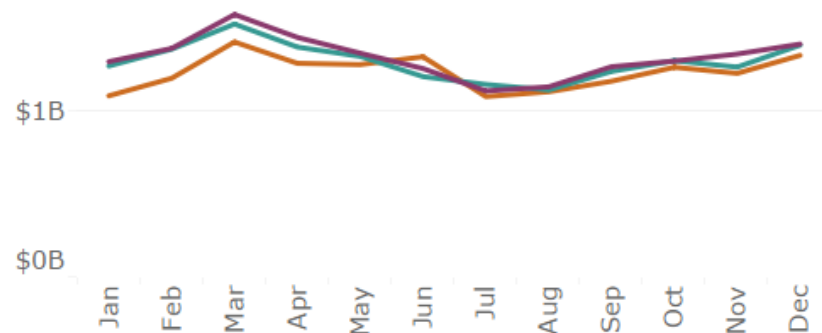
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



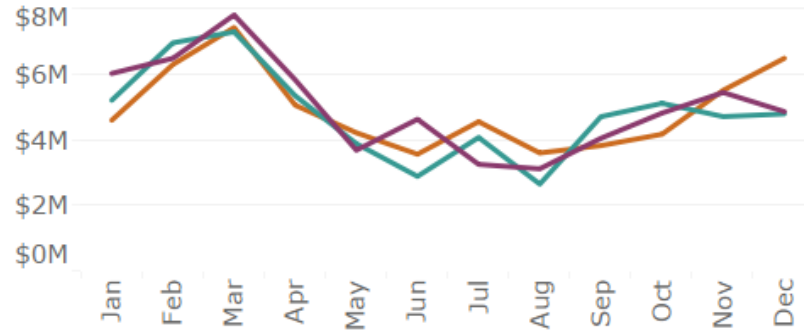
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Pinal County



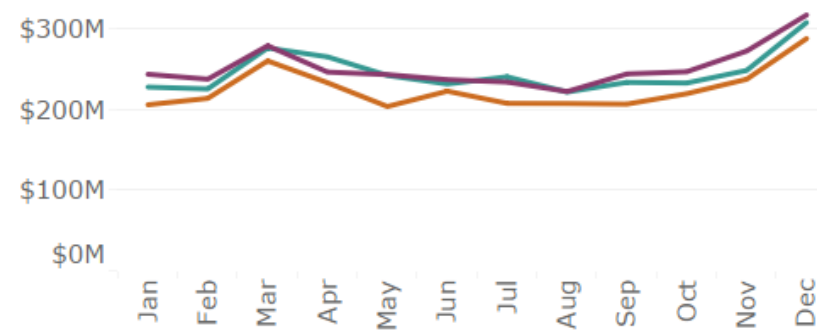
Hotel/Motel

2022 2023 2024



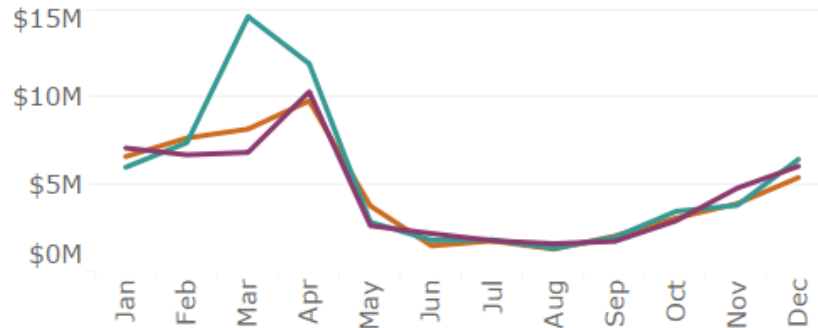
Retail

2022 2023 2024



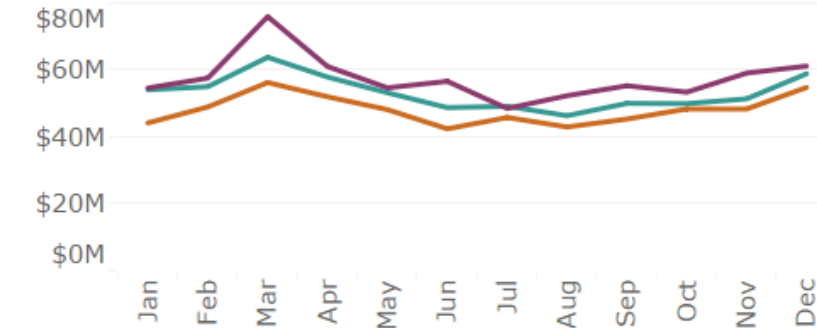
Amusement

2022 2023 2024



Restaurant

2022 2023 2024

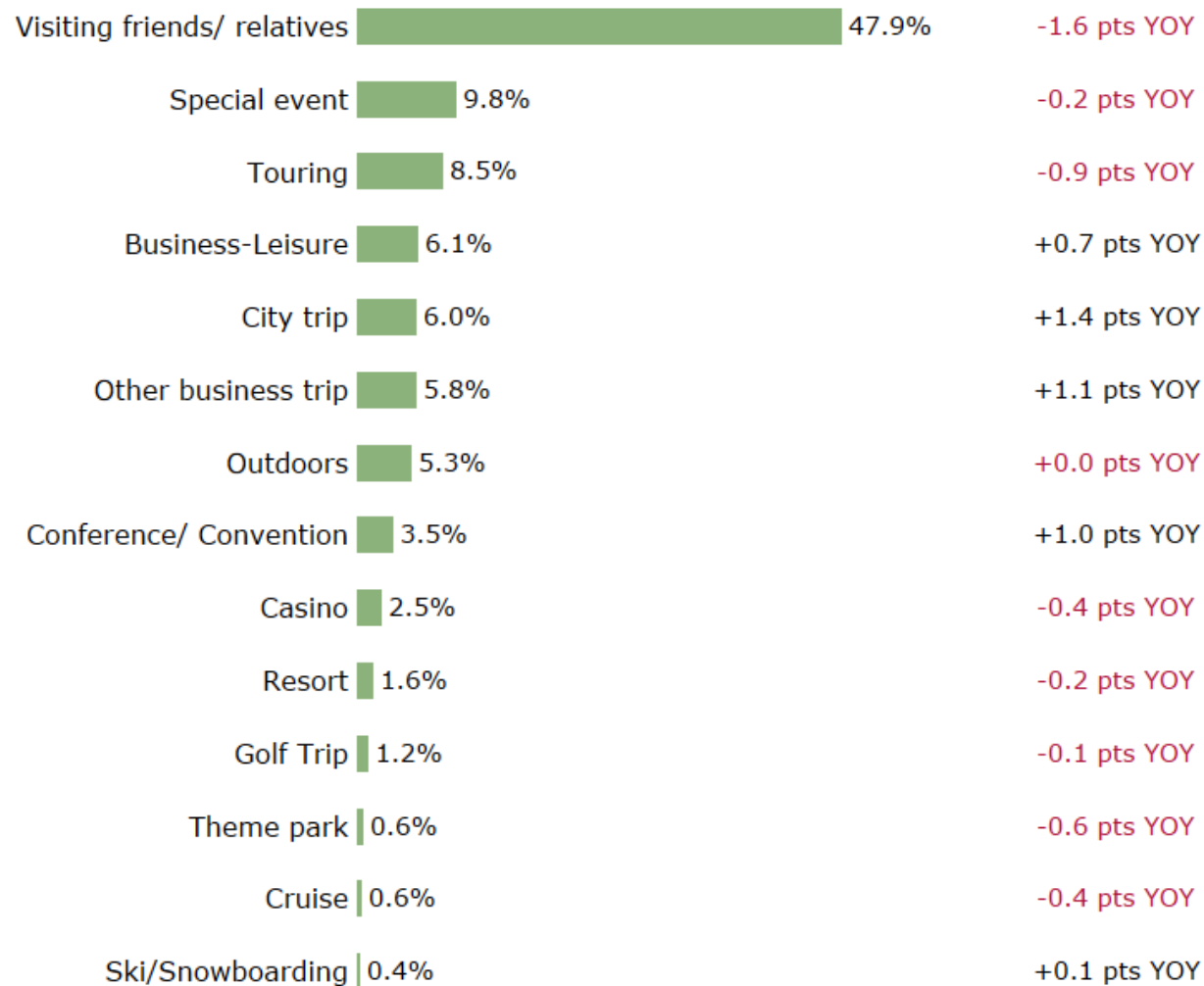


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Visitor Summary

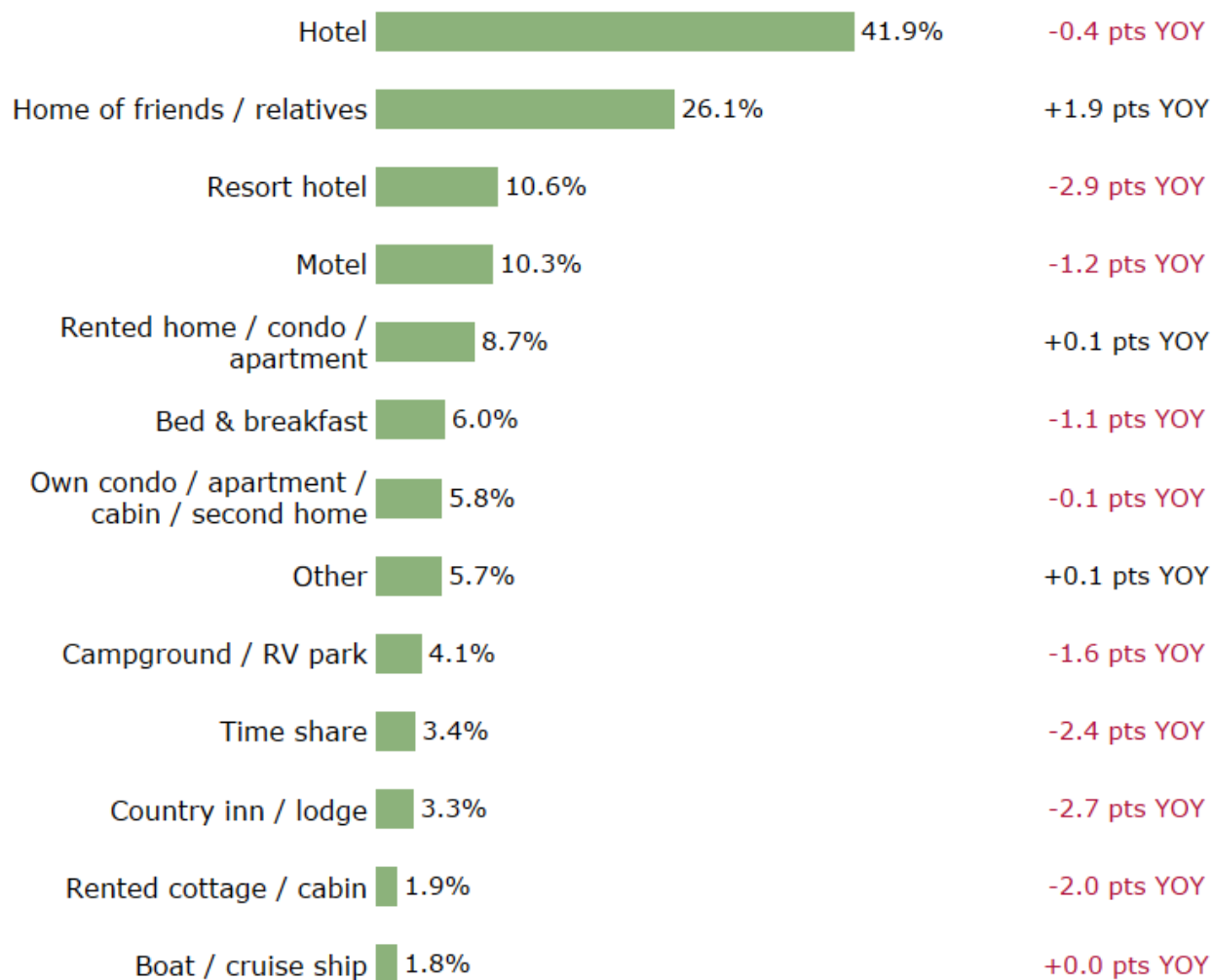


2024 Main Purpose of Trip: Phoenix & Central Region



Source: Longwoods

2024 Accommodation: Phoenix & Central Region



Source: Longwoods

2024 Visitor Summary: Maricopa County



86.4%
Overnight Visitor Share

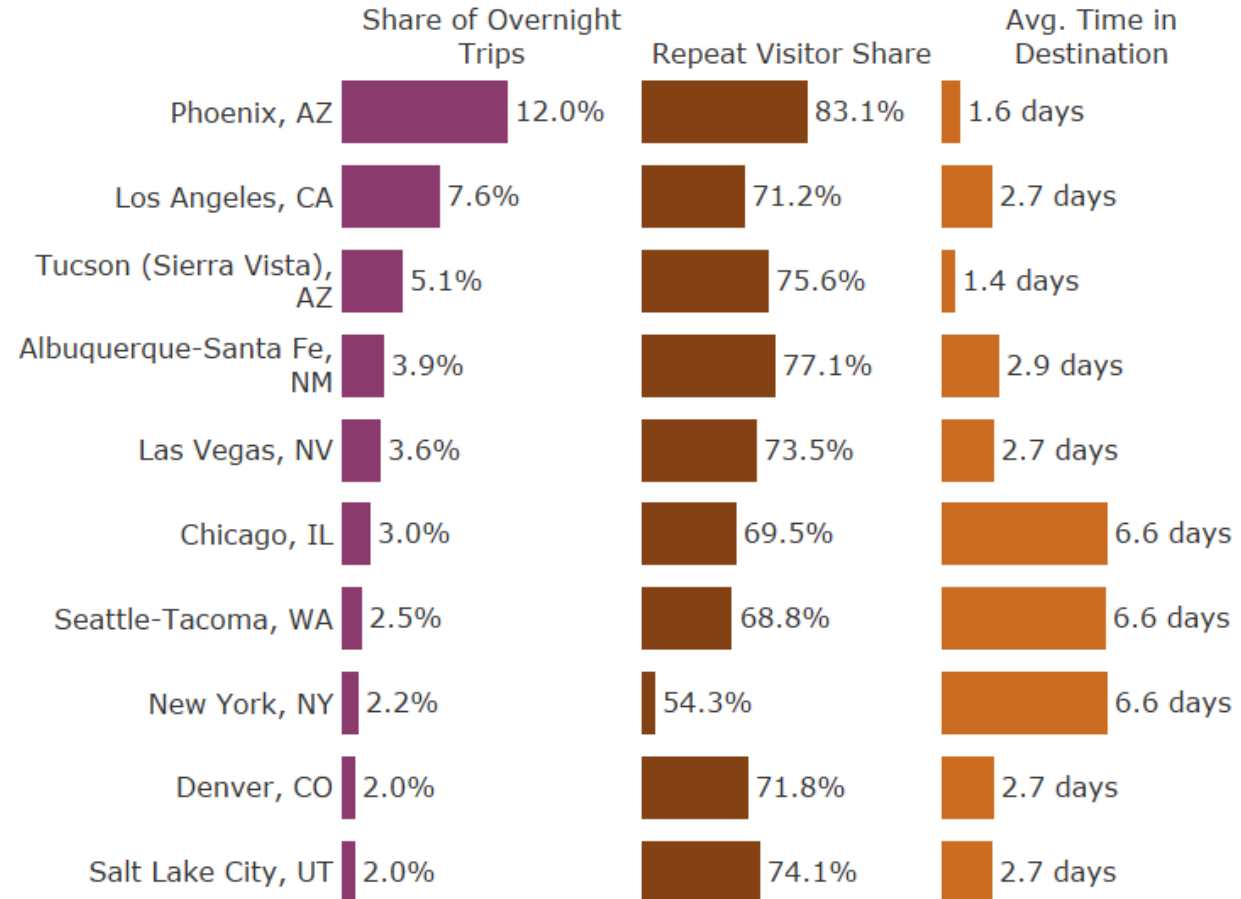


70.6%
Repeat Visitor Share



3.8 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

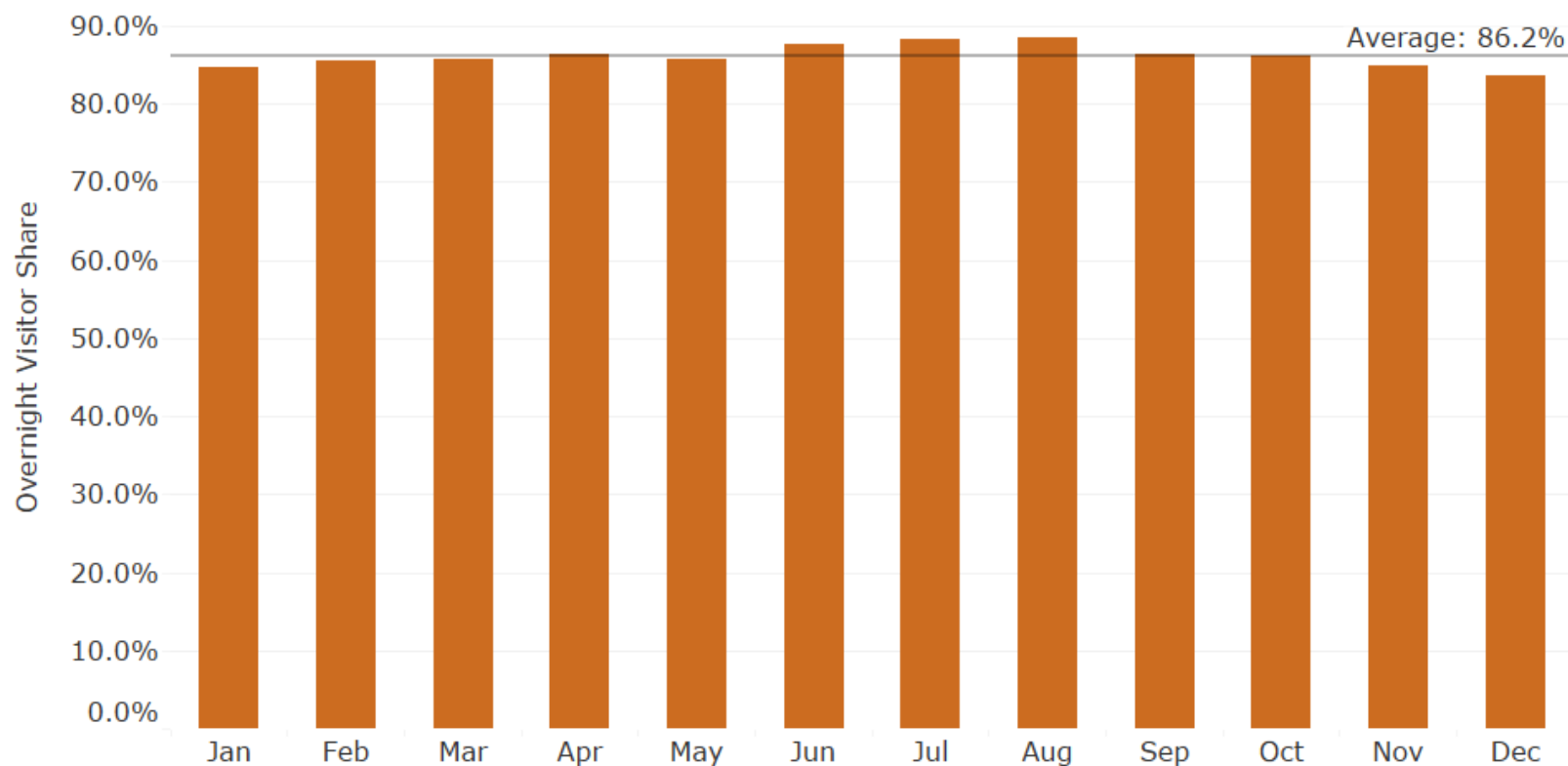


Source: Azira

Overnight Visitor Share: Maricopa County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Pinal County



75.9%
Overnight Visitor Share



69.7%
Repeat Visitor Share



2.2 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

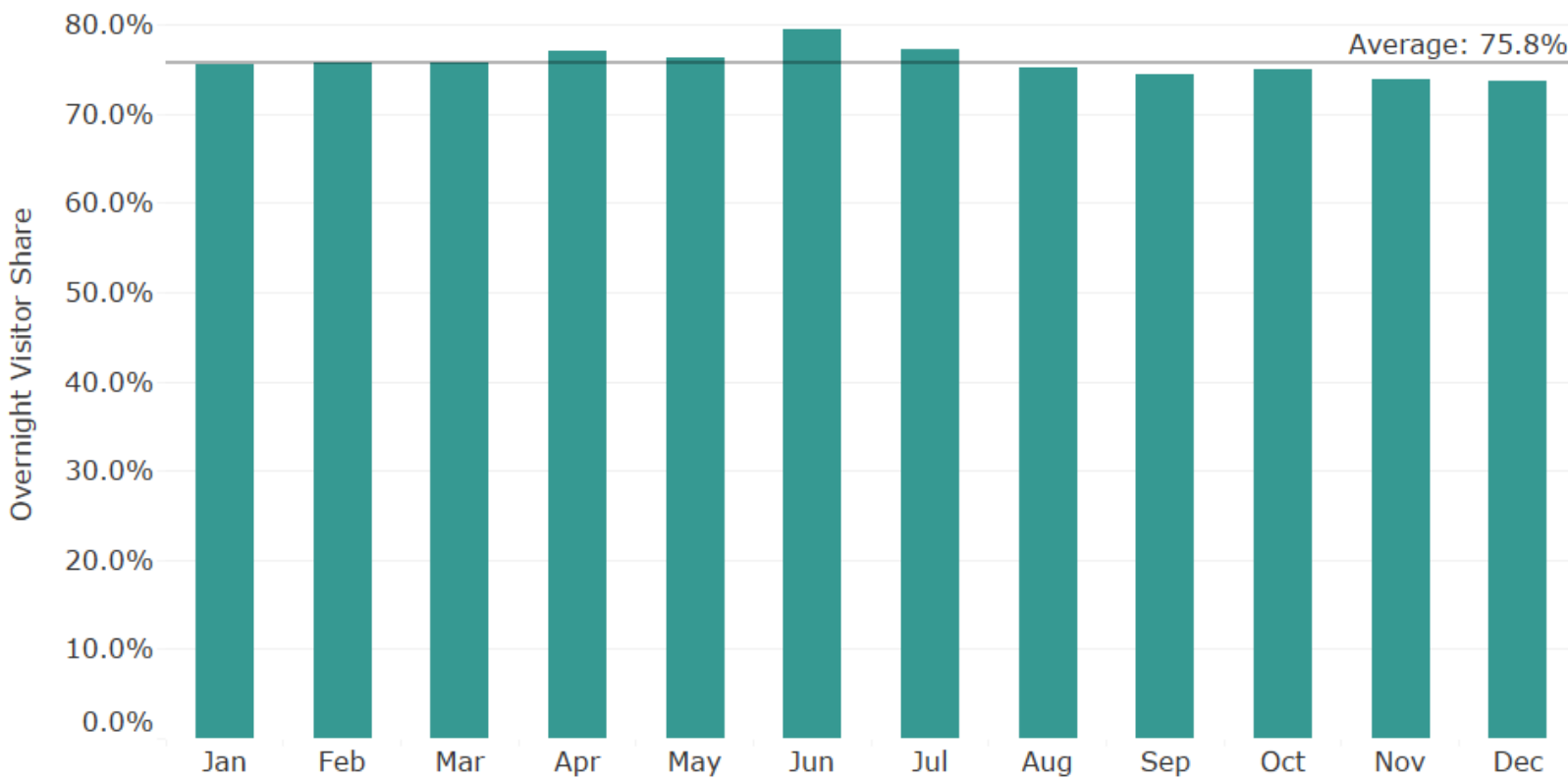
	Share of Overnight Trips	Repeat Visitor Share	Avg. Time in Destination
Phoenix, AZ	50.4%	74.0%	1.4 days
Tucson (Sierra Vista), AZ	9.0%	70.8%	1.3 days
Los Angeles, CA	3.1%	65.0%	2.7 days
Las Vegas, NV	1.6%	67.4%	2.7 days
Albuquerque-Santa Fe, NM	1.4%	68.8%	2.5 days
El Paso, TX	1.3%	63.4%	2.9 days
Chicago, IL	1.2%	69.9%	6.5 days
Dallas-Ft. Worth, TX	1.1%	66.6%	2.8 days
Seattle-Tacoma, WA	1.1%	73.0%	6.4 days
Minneapolis-St. Paul, MN	1.0%	73.1%	6.5 days

Source: Azira

Overnight Visitor Share: Pinal County



2024 Overnight Visitor Share Monthly Trend



Source: Azira