

TUCSON & SOUTHERN REGION

TRAVEL RESEARCH TRENDS



Arizona Travel Impact



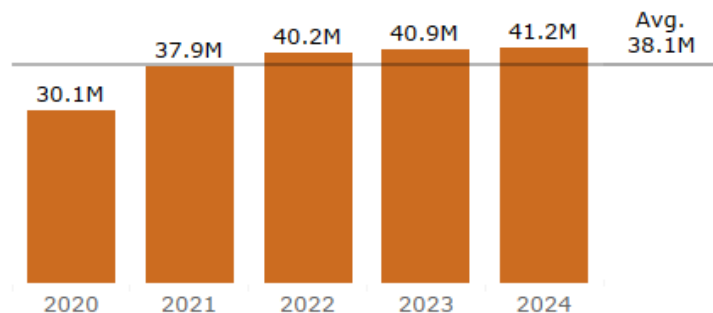
State Domestic Travel Impact



2024 Total Overnight Visitors

41.2M

+0.7% YOY | +1.3% vs. 2019



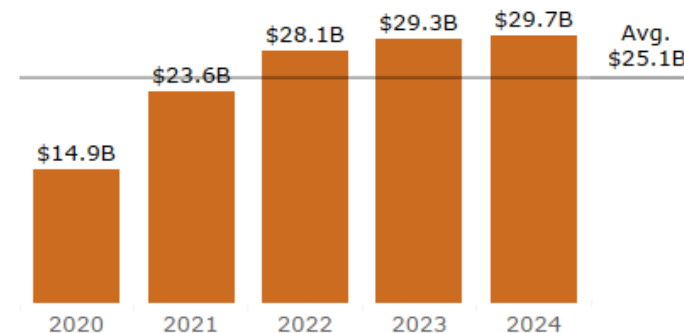
Source: Tourism Economics



2024 Total Spending

\$29.7B

+1.4% YOY | +16.2% vs. 2019



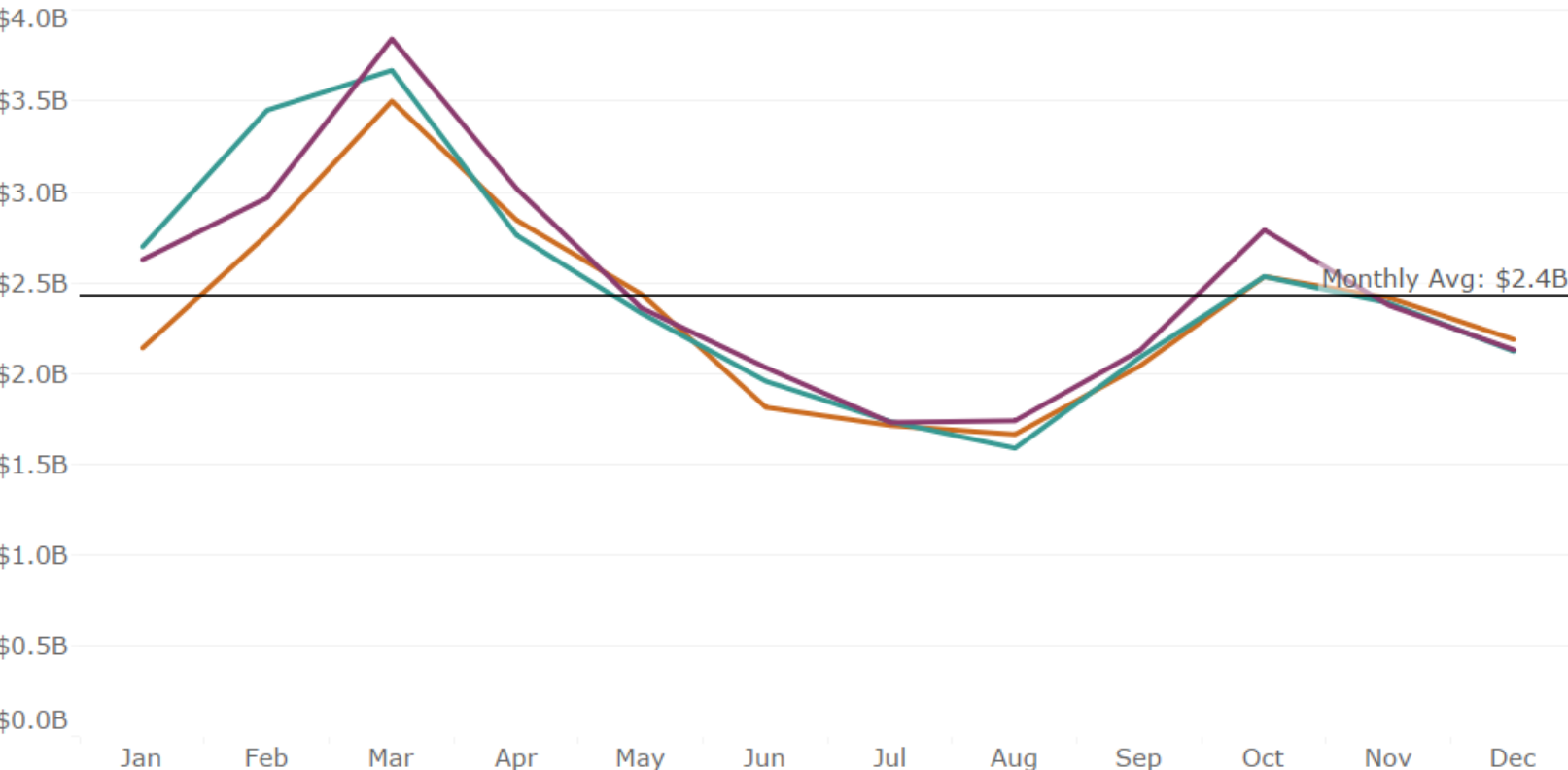
Source: Dean Runyan Associates

State Domestic Travel Impact



Monthly Travel Spending Trend

2022 2023 2024



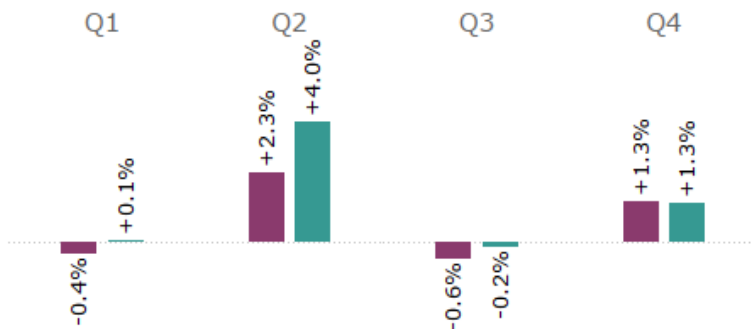
Source: Dean Runyan Associates

State Domestic Travel Impact

≡

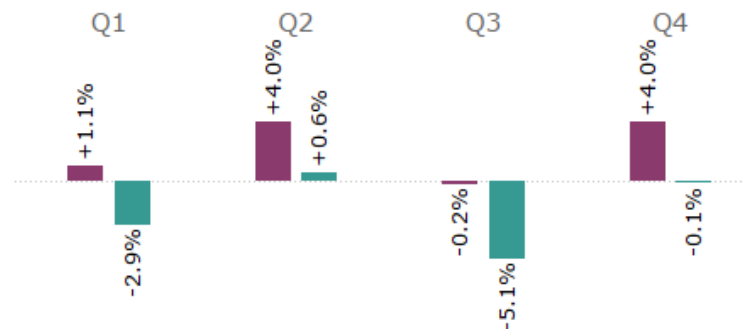
All Overnight Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



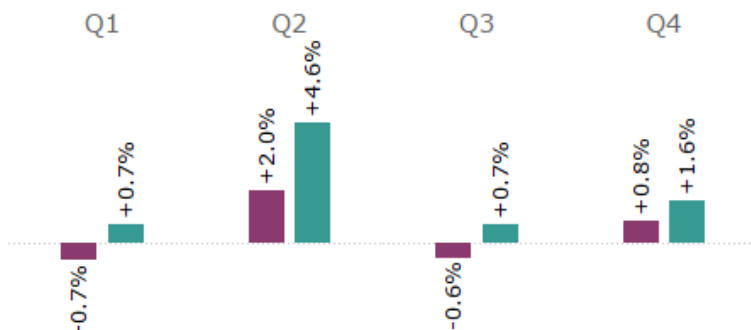
Overnight Business Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



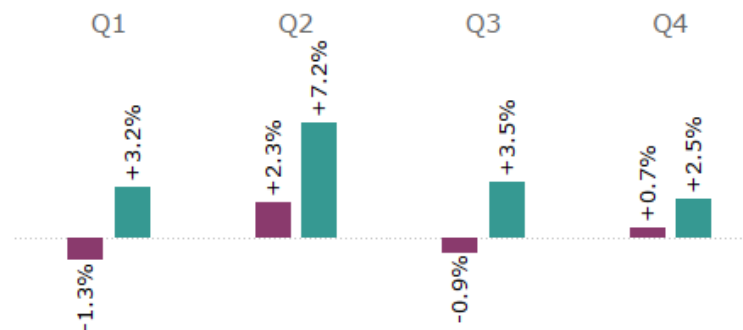
Overnight Leisure Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



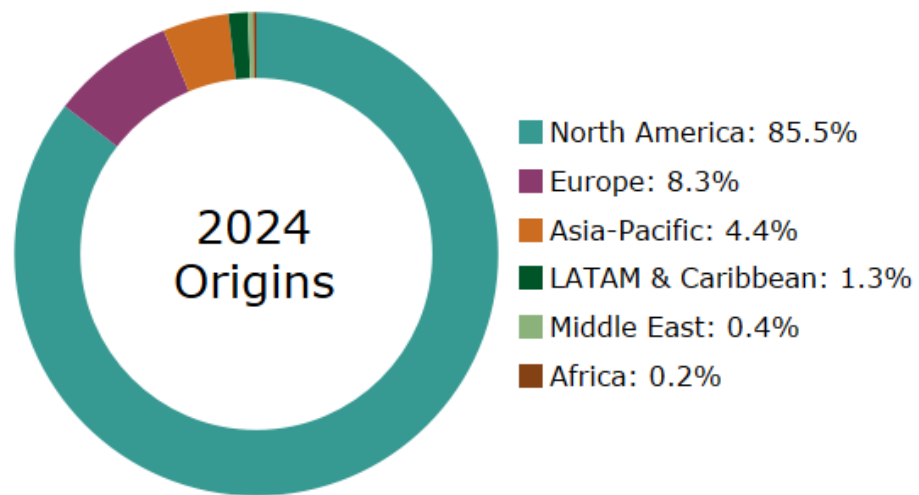
Overnight Resident Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019

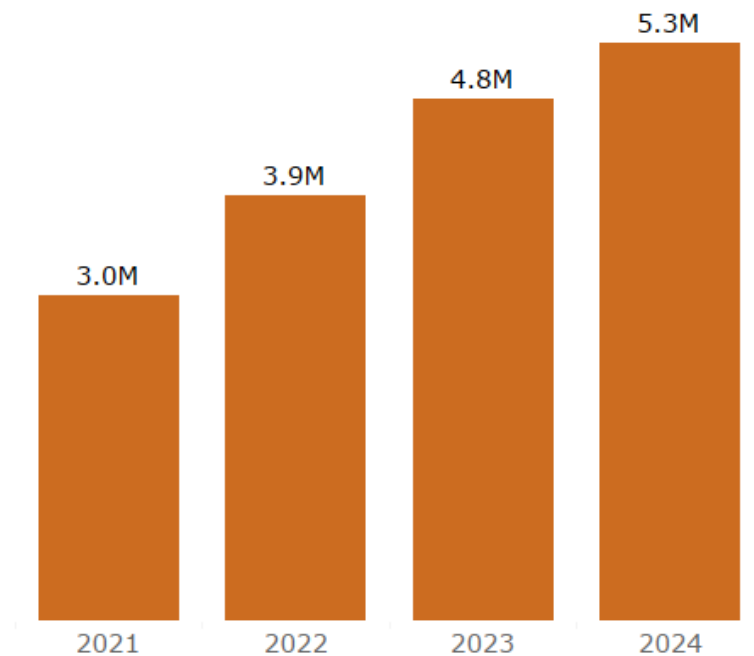


Source: Tourism Economics

State International Travel Impact



Annual International Overnight Visits
Last 4 years



Source: Tourism Economics International State Travel

Travel Impact by County



2024 Total Spending: Tucson & Southern Region



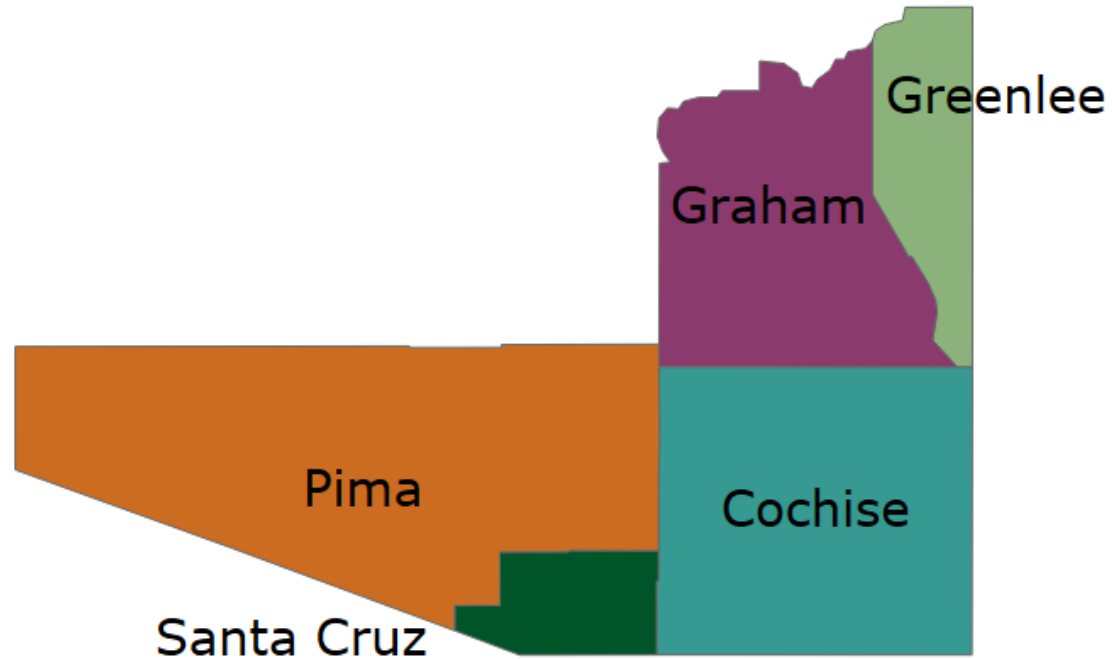
Pima
\$3.5B
+0.1% YOY

Santa Cruz
\$283.3M
-1.6% YOY

Graham
\$80.8M
+3.4% YOY

Greenlee
\$16.8M
+1.5% YOY

Cochise
\$379.7M
-2.8% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

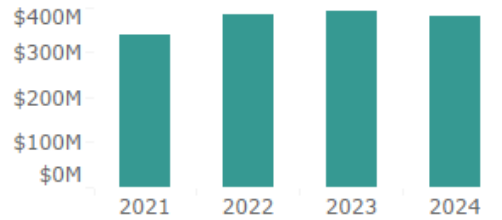
Travel Impacts: Cochise County



Direct Travel Spending

-\$10.8M

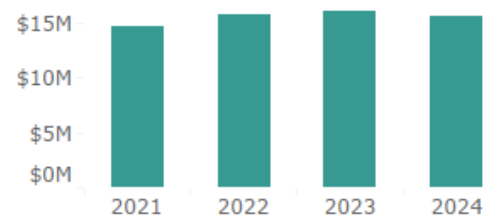
-2.8% YOY



Local Tax Receipts

-\$392.2K

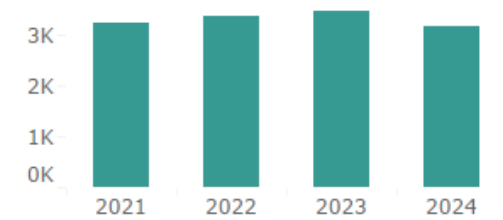
-2.4% YOY



Employment

-290

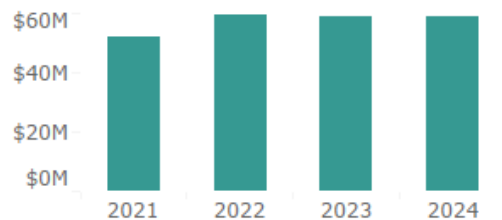
-8.4% YOY



Accommodations Spending

-\$133.2K

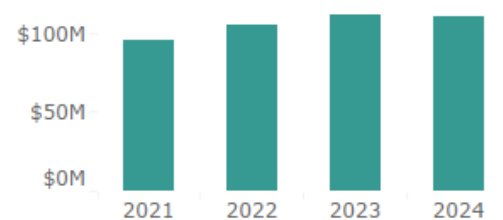
-0.2% YOY



Food Service Spending

-\$616.1K

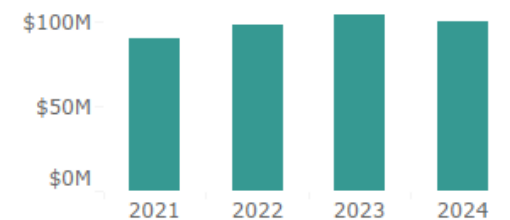
-0.6% YOY



Earnings

-\$4.2M

-4.1% YOY

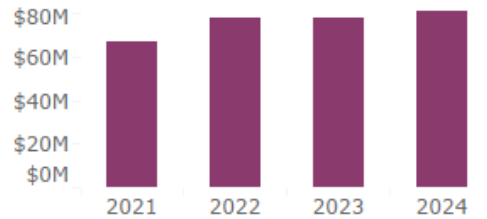


Source: Arizona Travel Impacts, Dean Runyan Associates

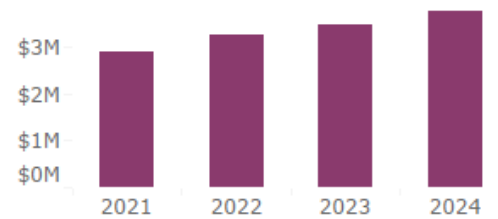
Travel Impacts: Graham County



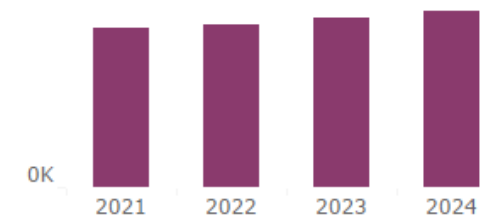
Direct Travel Spending
+\$2.7M
+3.4% YOY



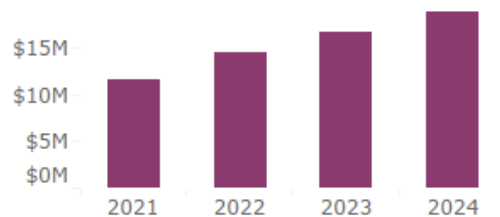
Local Tax Receipts
+\$297.9K
+8.6% YOY



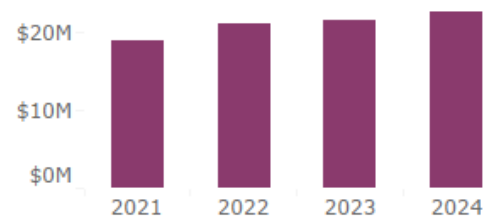
Employment
+30
+3.4% YOY



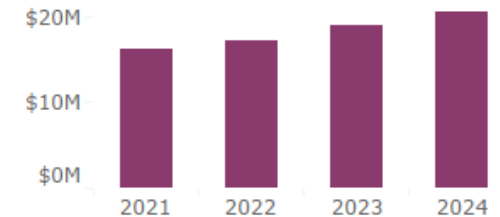
Accommodations Spending
+\$2.2M
+13.4% YOY



Food Service Spending
+\$946.6K
+4.4% YOY



Earnings
+\$1.5M
+7.7% YOY

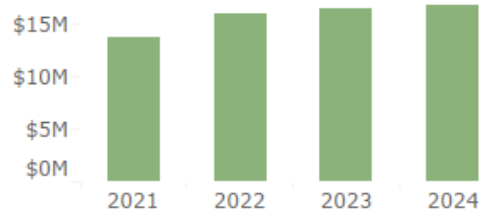


Source: Arizona Travel Impacts, Dean Runyan Associates

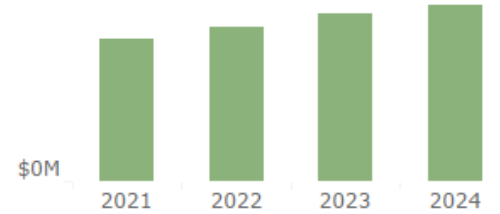
Travel Impacts: Greenlee County



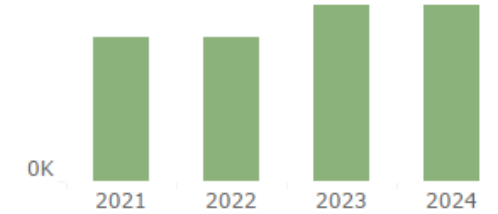
Direct Travel Spending
+\$241.0K
+1.5% YOY



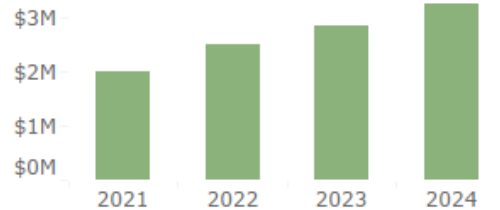
Local Tax Receipts
+\$14.5K
+5.2% YOY



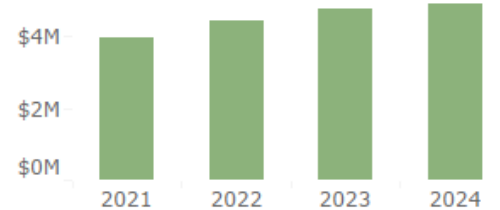
Employment
+0
+0.0% YOY



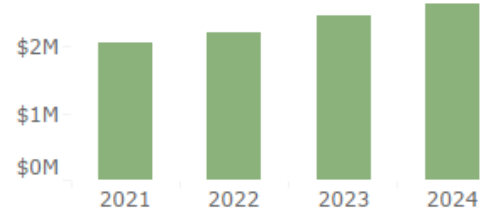
Accommodations Spending
+\$399.4K
+14.1% YOY



Food Service Spending
+\$121.0K
+2.5% YOY



Earnings
+\$161.4K
+6.5% YOY

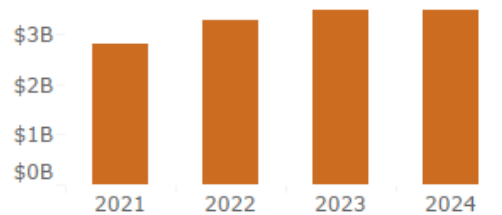


Source: Arizona Travel Impacts, Dean Runyan Associates

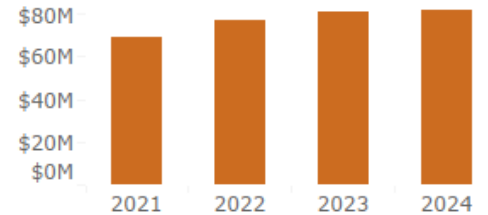
Travel Impacts: Pima County



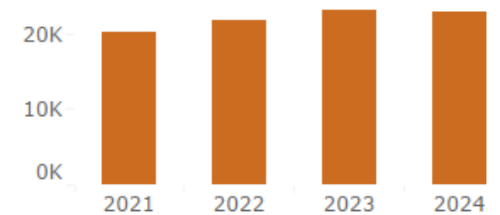
Direct Travel Spending
+\$3.5M
+0.1% YOY



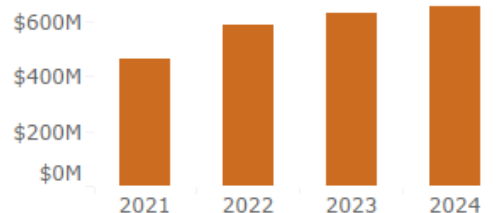
Local Tax Receipts
+\$471.1K
+0.6% YOY



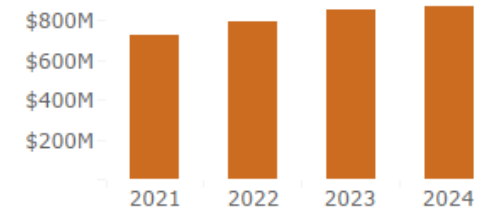
Employment
-170
-0.7% YOY



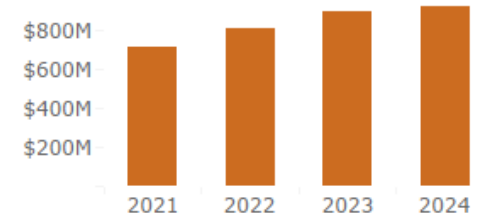
Accommodations Spending
+\$25.7M
+4.1% YOY



Food Service Spending
+\$13.3M
+1.5% YOY



Earnings
+\$23.0M
+2.6% YOY



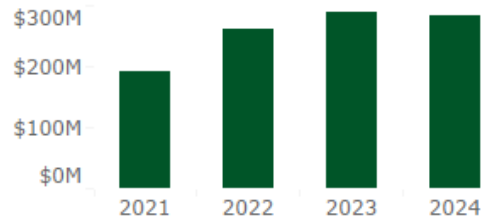
Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Santa Cruz County



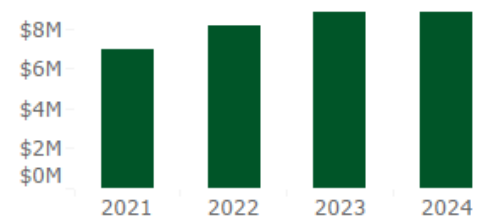
Direct Travel Spending

-\$4.6M
-1.6% YOY



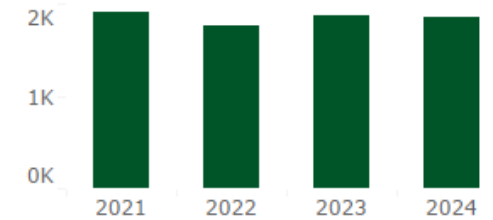
Local Tax Receipts

-\$14.8K
-0.2% YOY



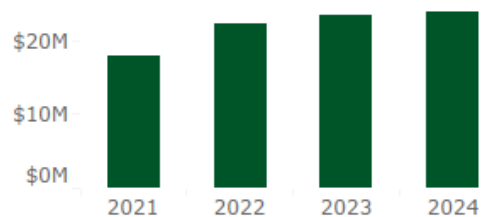
Employment

-10
-0.5% YOY



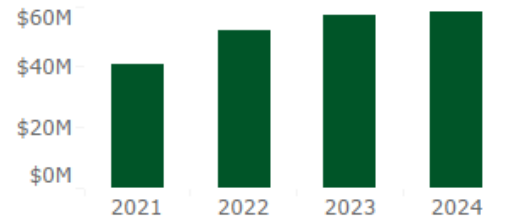
Accommodations Spending

+\$429.4K
+1.8% YOY



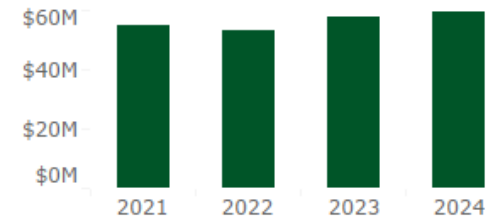
Food Service Spending

+\$748.5K
+1.3% YOY



Earnings

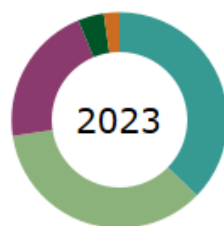
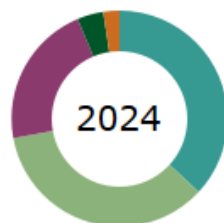
+\$1.5M
+2.6% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

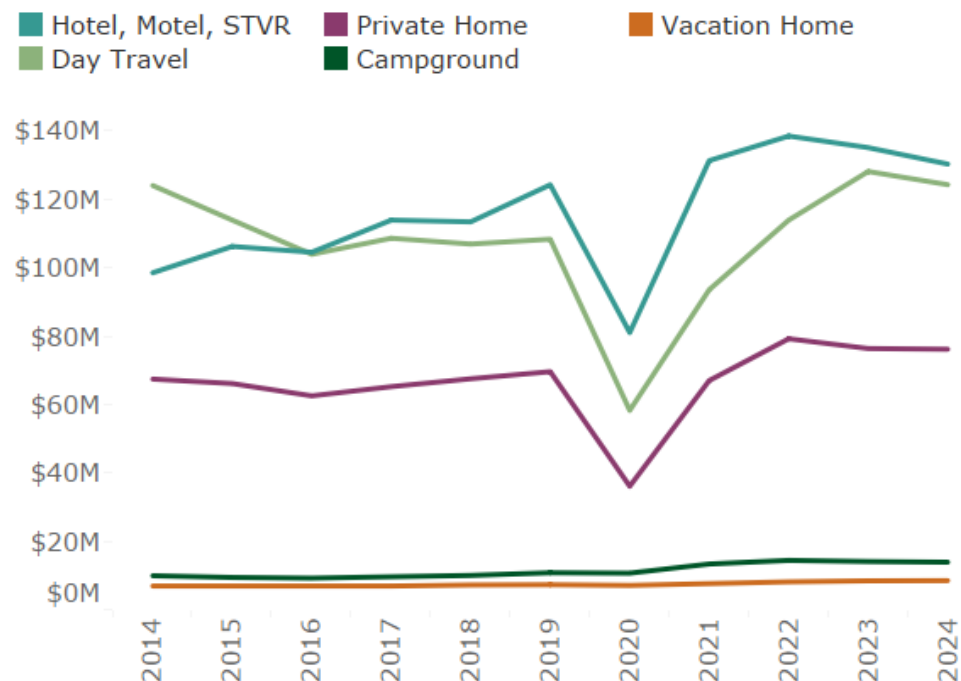
Spend by Accommodation Type: Cochise County

≡



Hotel, Motel, STVR: 36.9%
Day Travel: 35.2%
Private Home: 21.6%
Campground: 3.9%
Vacation Home: 2.4%

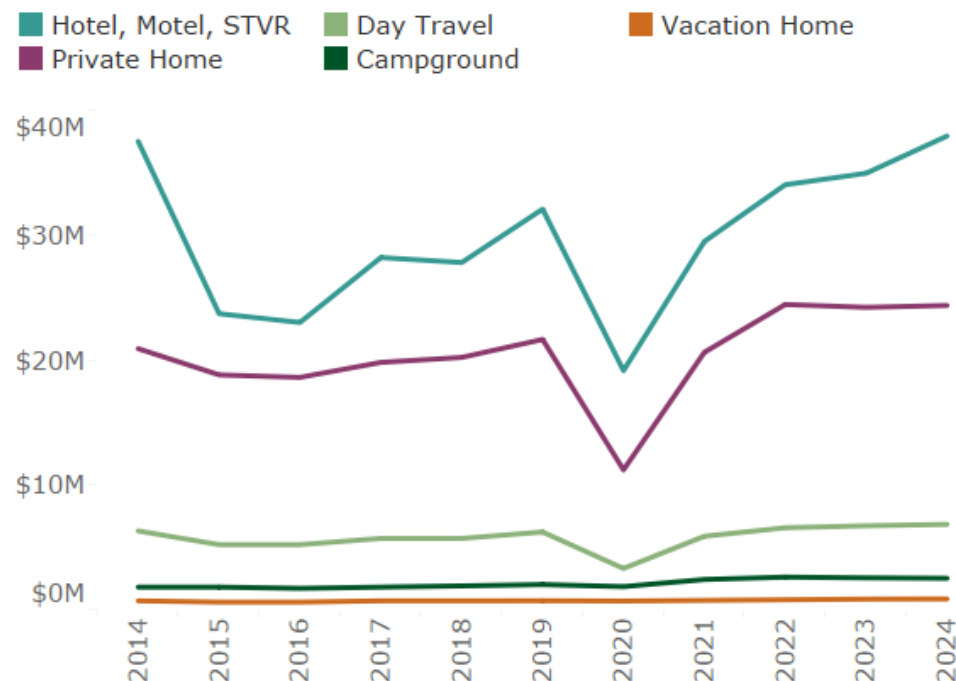
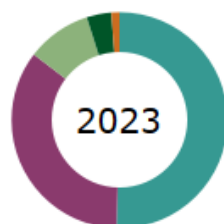
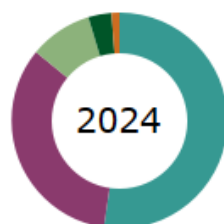
Hotel, Motel, STVR: 37.3%
Day Travel: 35.4%
Private Home: 21.1%
Campground: 3.9%
Vacation Home: 2.3%



Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

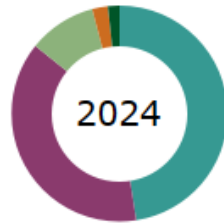
Spend by Accommodation Type: Graham County



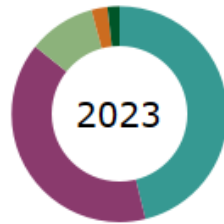
Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

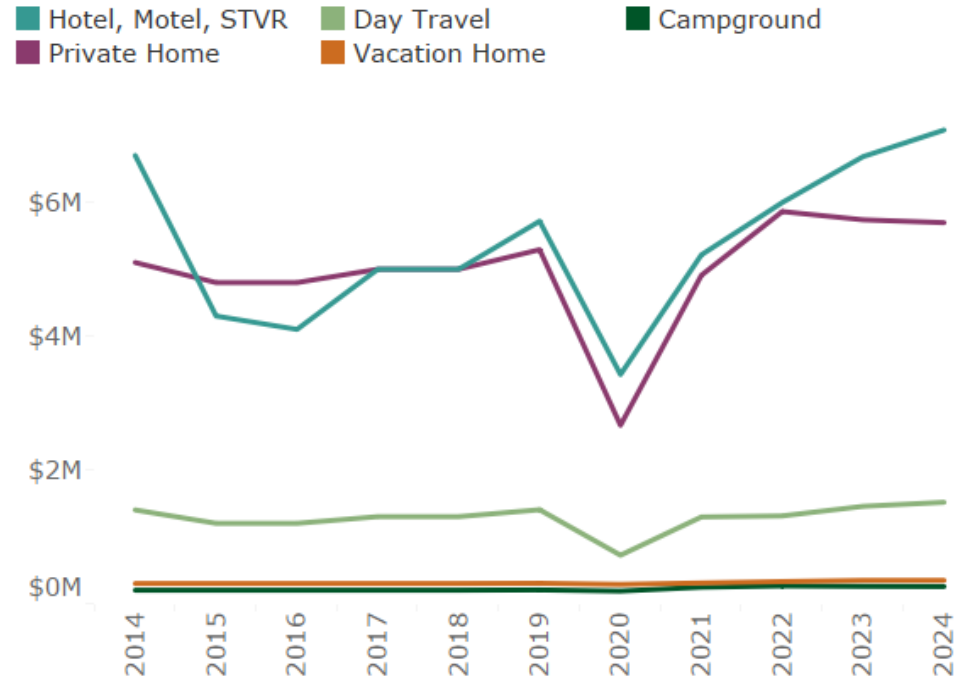
Spend by Accommodation Type: Greenlee County



Hotel, Motel, STVR: 47.5%
Private Home: 38.2%
Day Travel: 10.2%
Vacation Home: 2.3%
Campground: 1.7%



Hotel, Motel, STVR: 46.2%
Private Home: 39.6%
Day Travel: 10.0%
Vacation Home: 2.4%
Campground: 1.8%

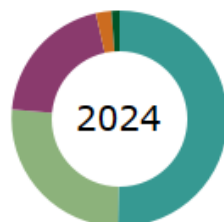


Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

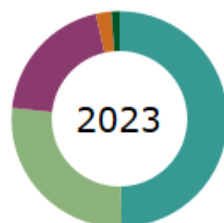
Spend by Accommodation Type: Pima County

≡



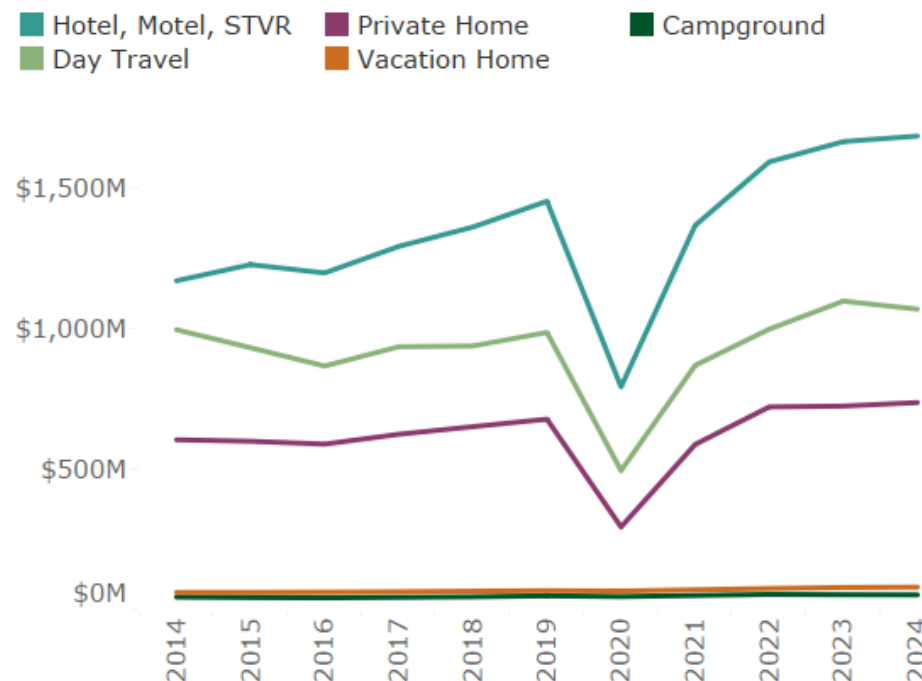
2024

Hotel, Motel, STVR: 50.2%
Day Travel: 26.1%
Private Home: 20.1%
Vacation Home: 2.4%
Campground: 1.2%



2023

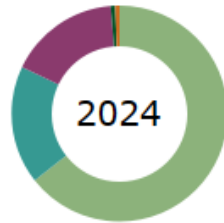
Hotel, Motel, STVR: 49.7%
Day Travel: 27.0%
Private Home: 19.8%
Vacation Home: 2.3%
Campground: 1.2%



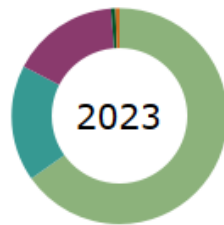
Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

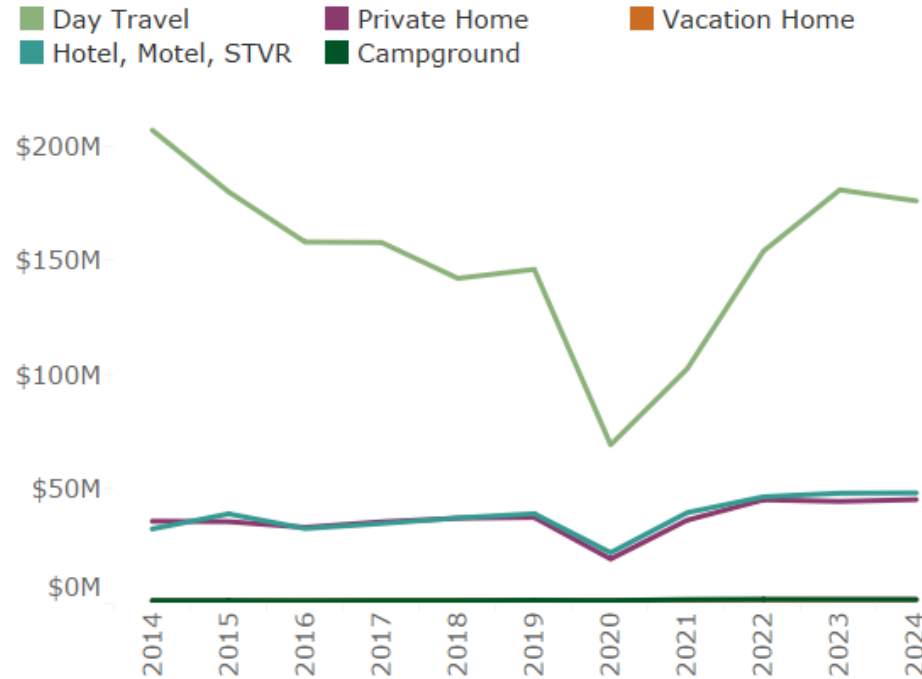
Spend by Accommodation Type: Santa Cruz County



Day Travel: 64.4%
Hotel, Motel, STVR: 17.7%
Private Home: 16.6%
Campground: 0.7%
Vacation Home: 0.6%



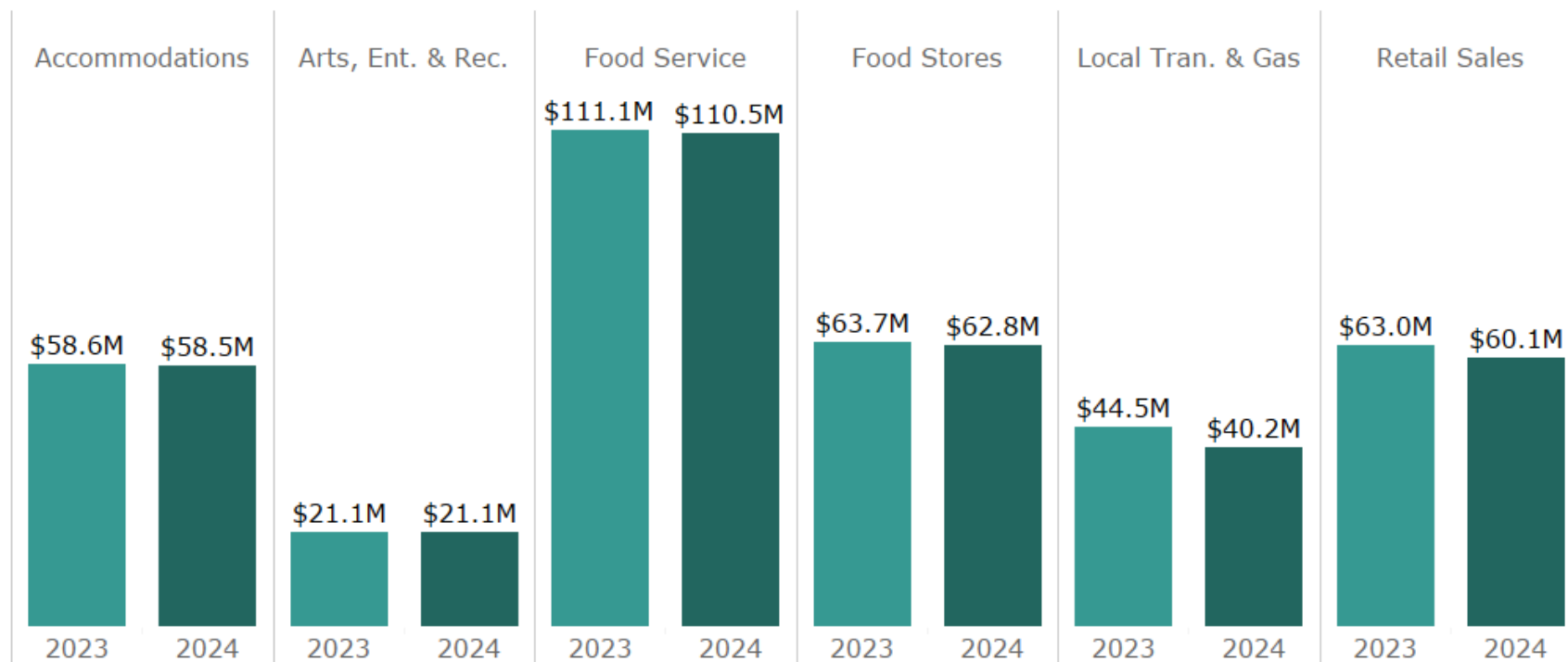
Day Travel: 65.2%
Hotel, Motel, STVR: 17.4%
Private Home: 16.1%
Campground: 0.7%
Vacation Home: 0.6%



Source: Arizona Travel Impacts, Dean Runyan Associates

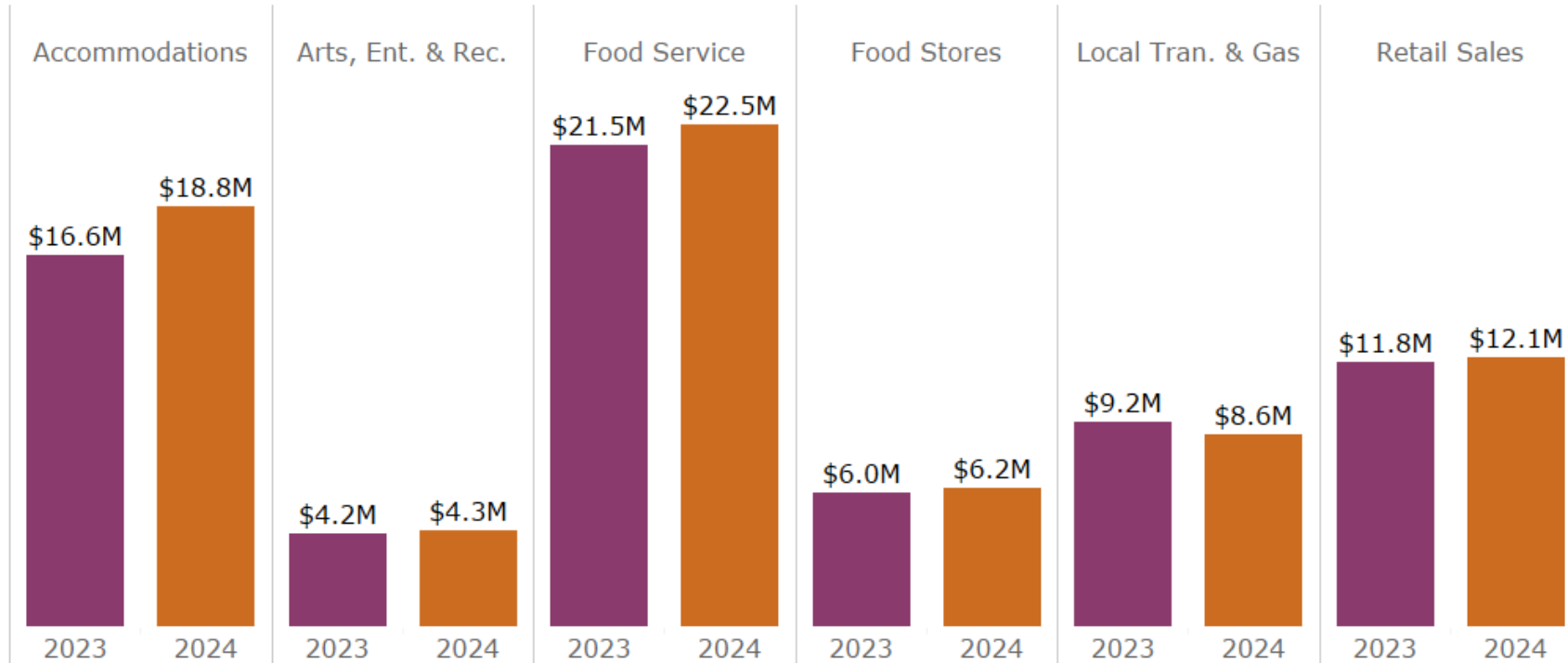
* STVR stands for Short-Term Vacation Rental

Spend by Commodity: Cochise County



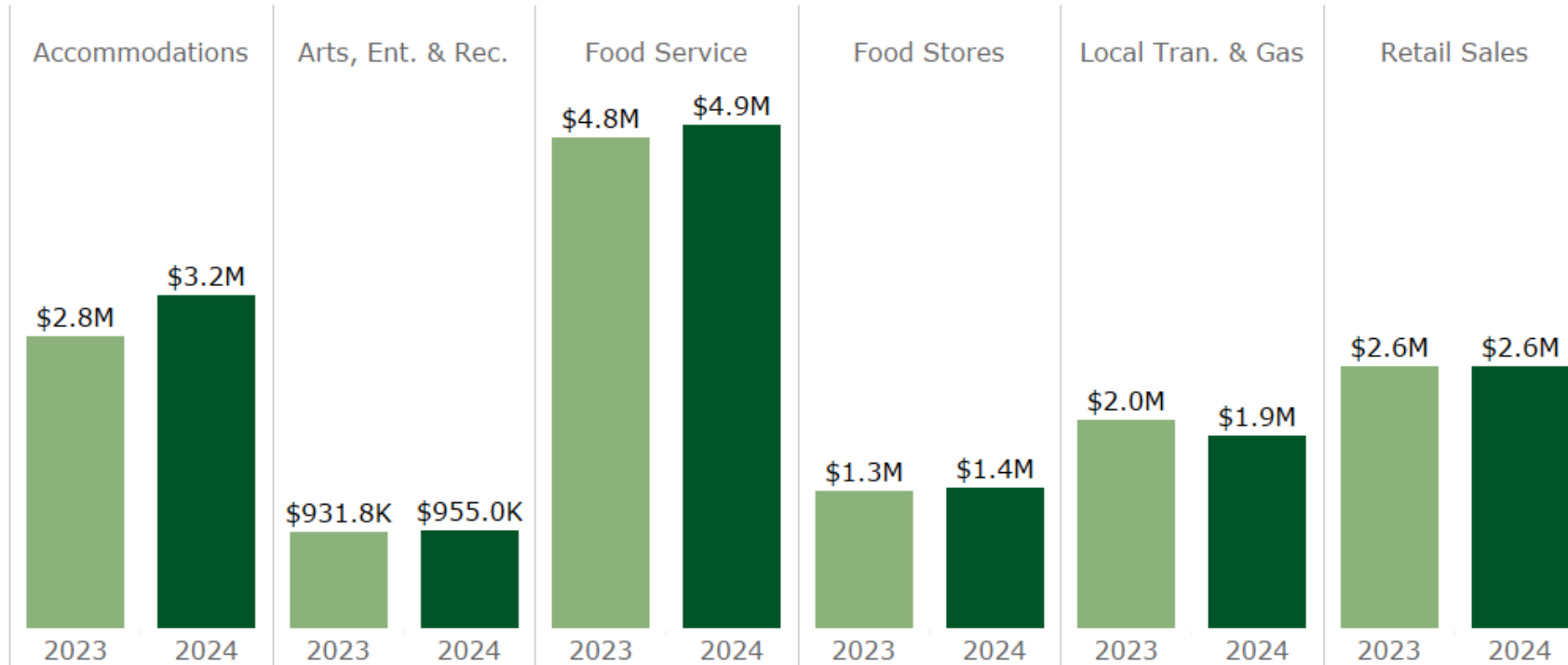
Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Graham County



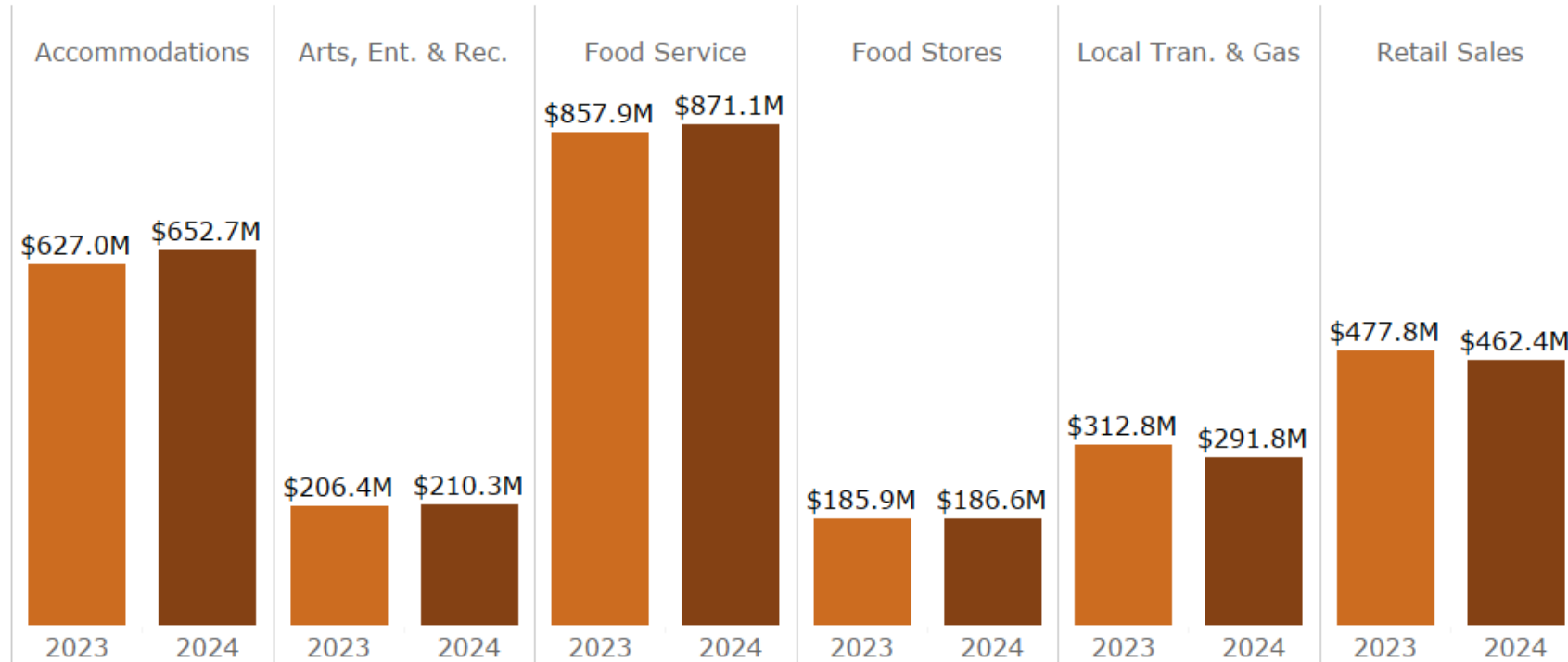
Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Commodity: Greenlee County



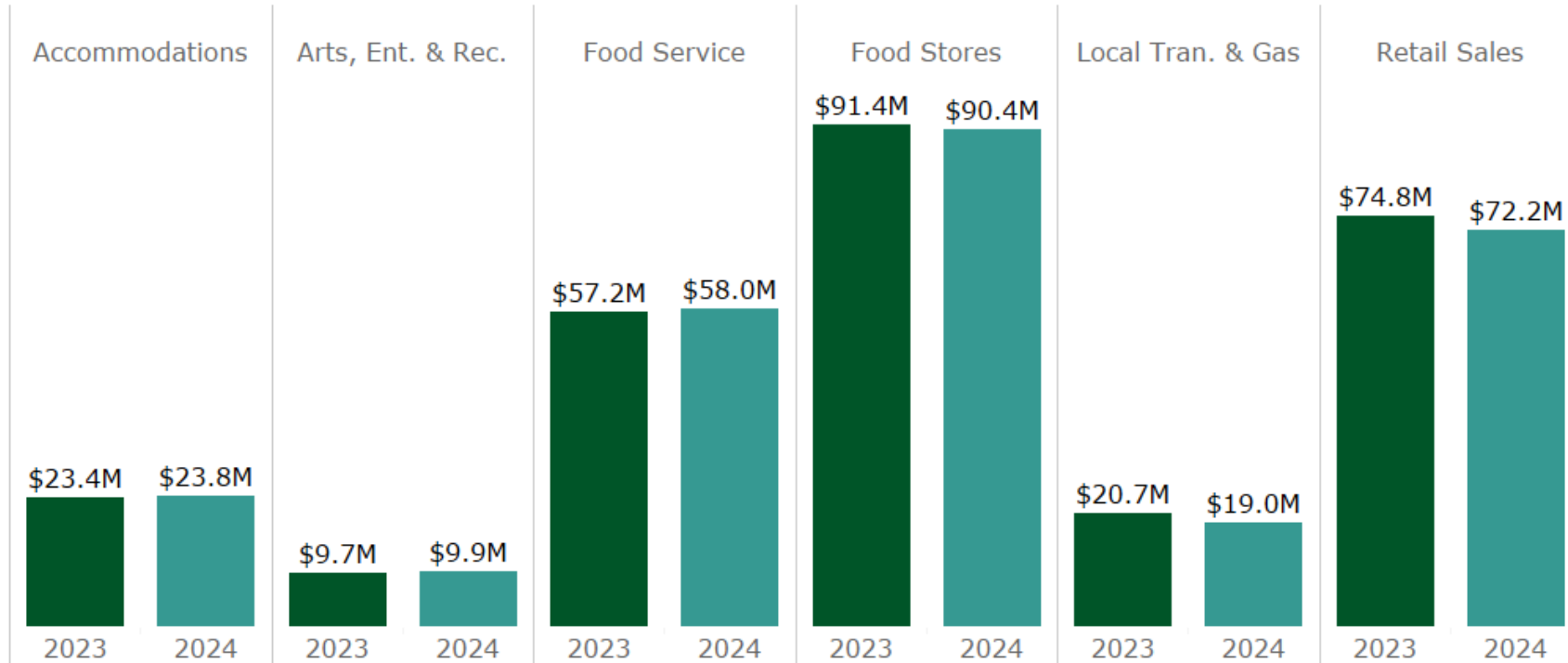
Source: Arizona Travel Impacts, Dean Runyan Associates

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

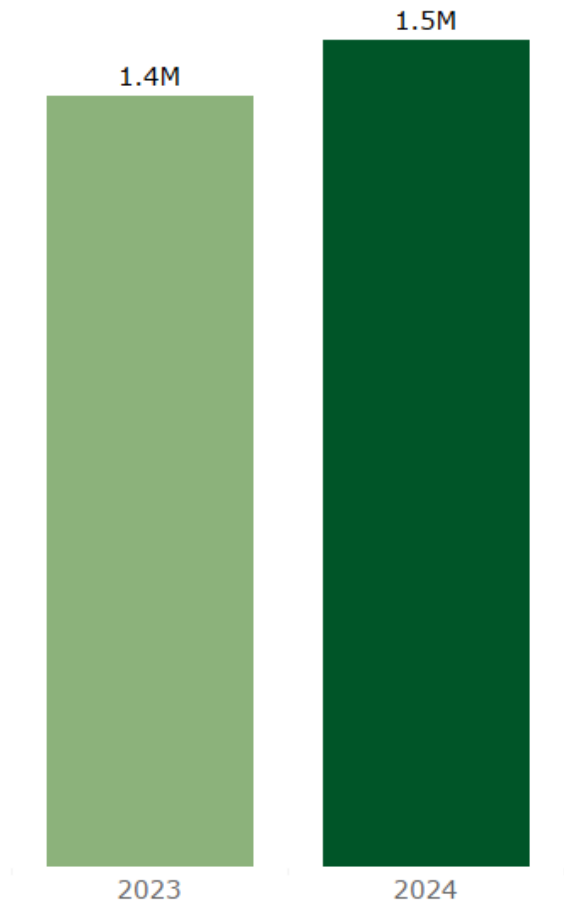


Short-Term Rentals: Tucson & Southern Region



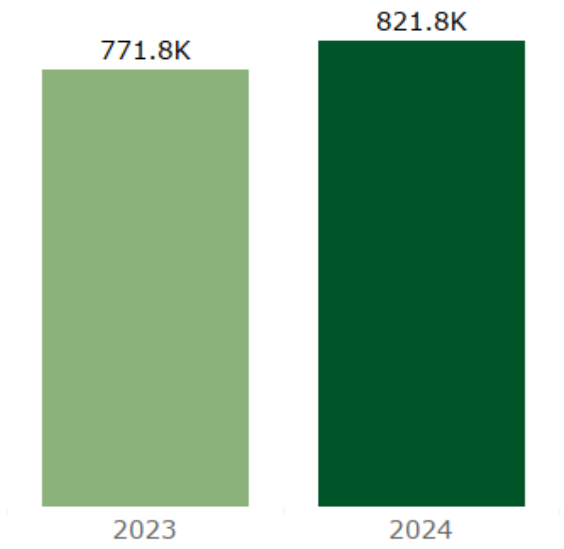
Year-to-Date Supply

Jan - Dec All Properties Available



Year-to-Date Demand

Jan - Dec Nights Sold at All Properties



Source: AirDNA

Airport Passenger Traffic

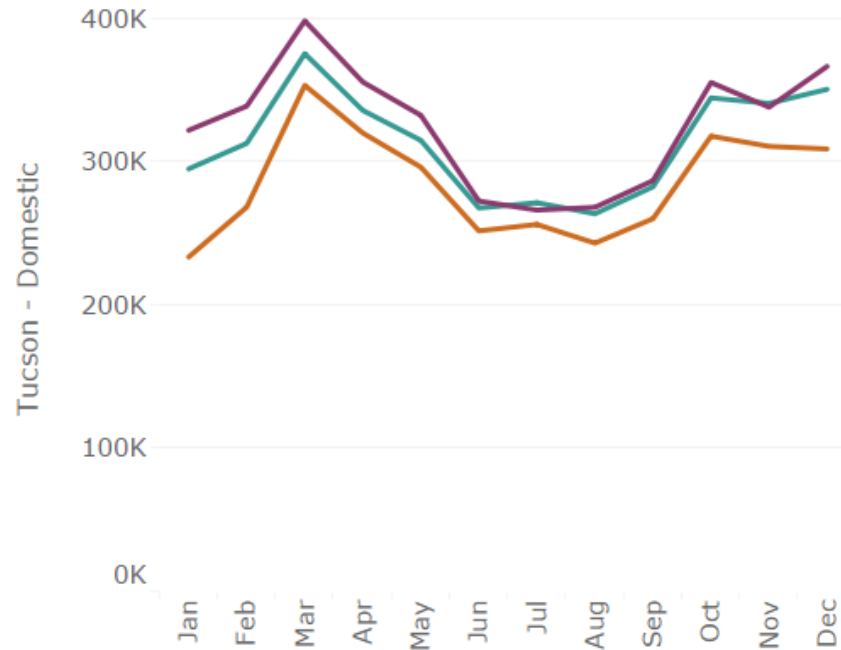


Airport Passengers: Tucson & Southern Region

≡

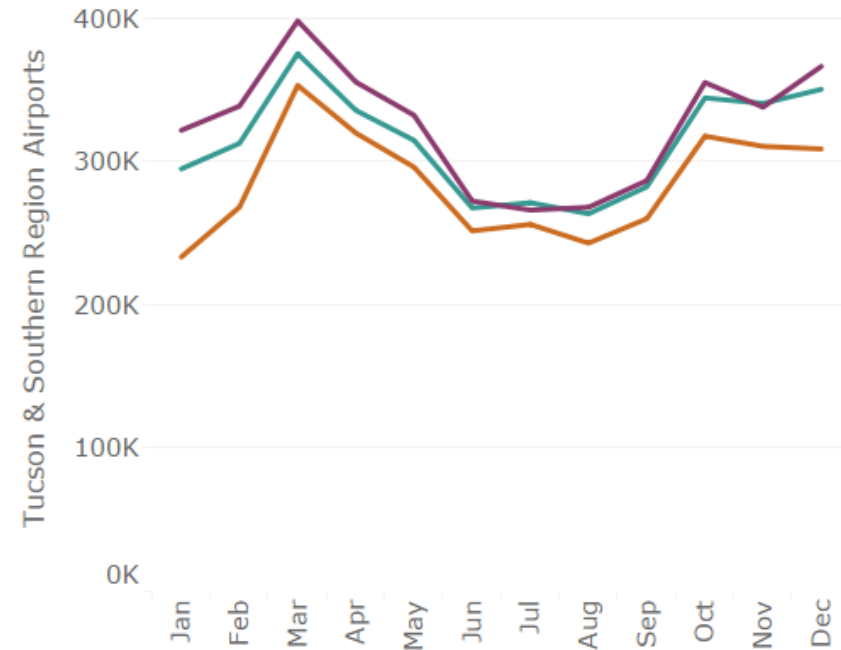
Airport Hub

2022 2023 2024



Region Airports

2022 2023 2024



Tucson Domestic & International

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

National & State Parks

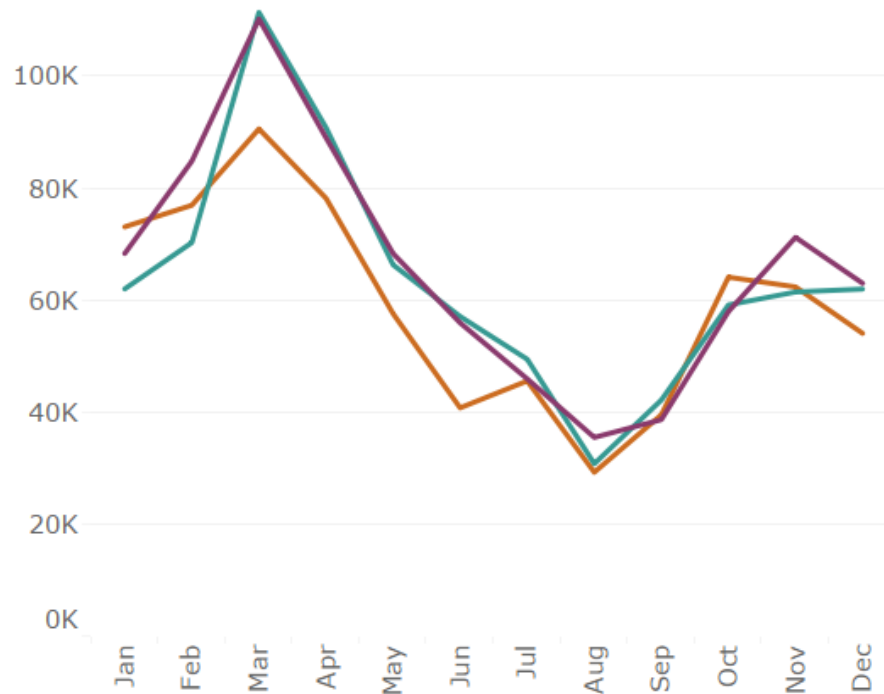


State Parks: Tucson & Southern Region



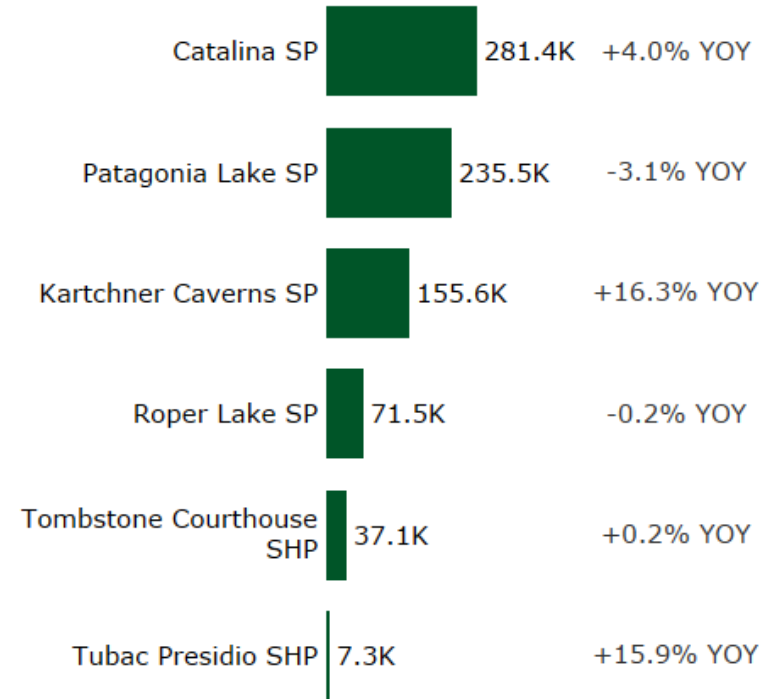
State Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change



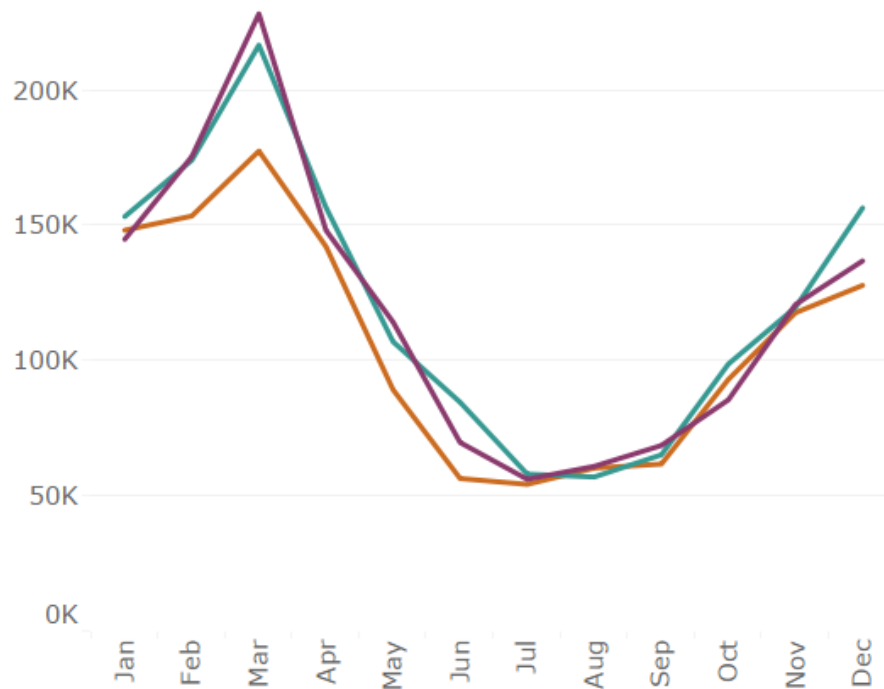
Source: Northern Arizona University, Arizona State Parks

National Parks: Tucson & Southern Region



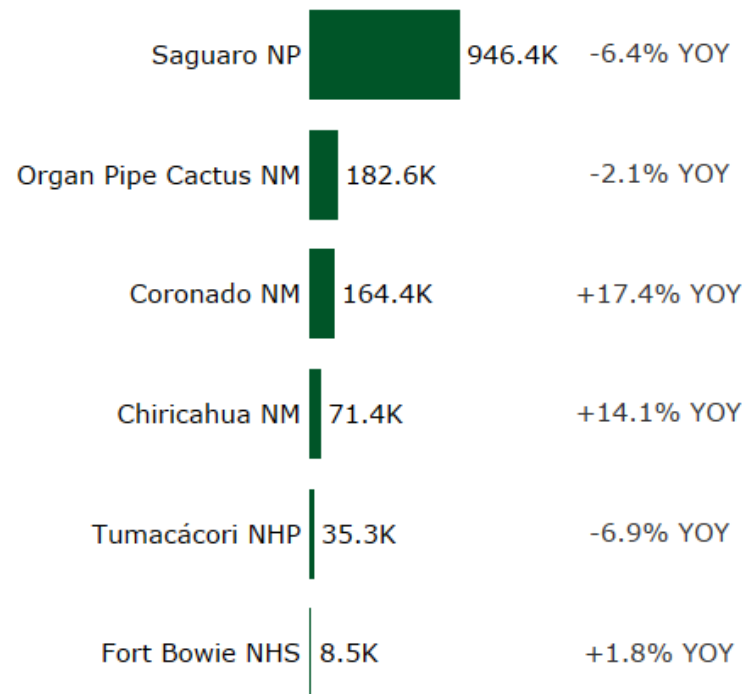
National Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change



Source: Northern Arizona University, National Park Service

Gross Sales

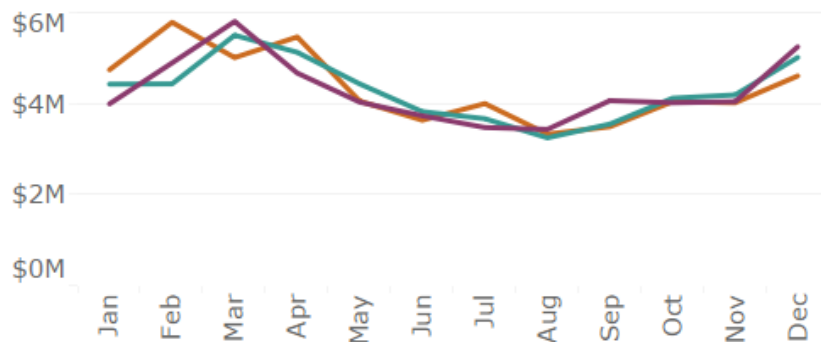


Gross Sales: Cochise County



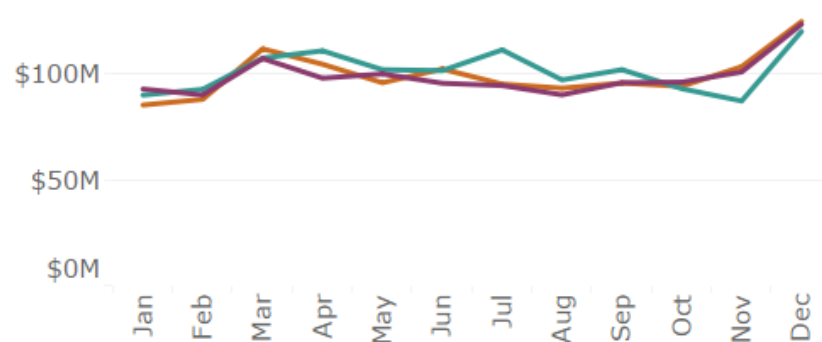
Hotel/Motel

2022 2023 2024



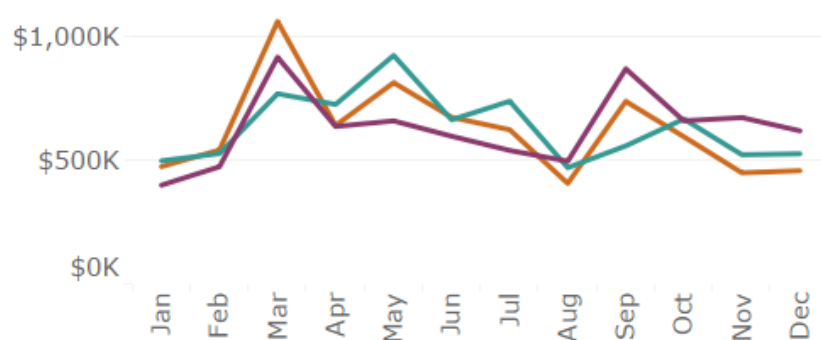
Retail

2022 2023 2024



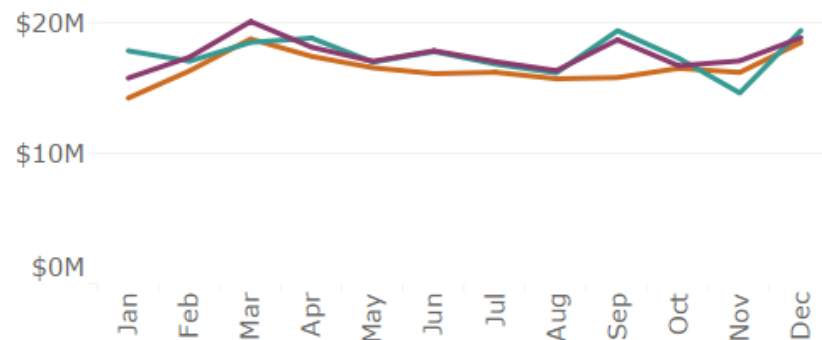
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



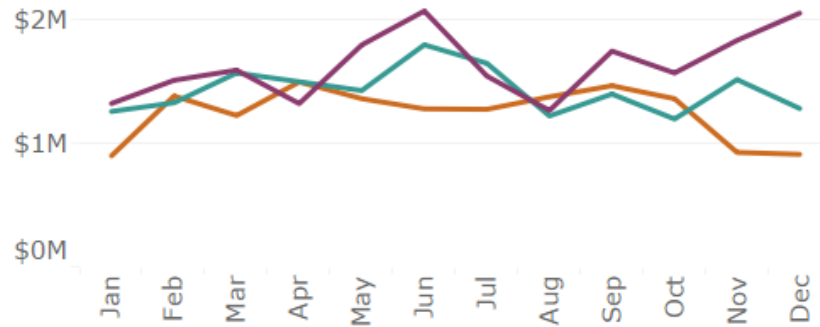
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Graham/Greenlee/La Paz County



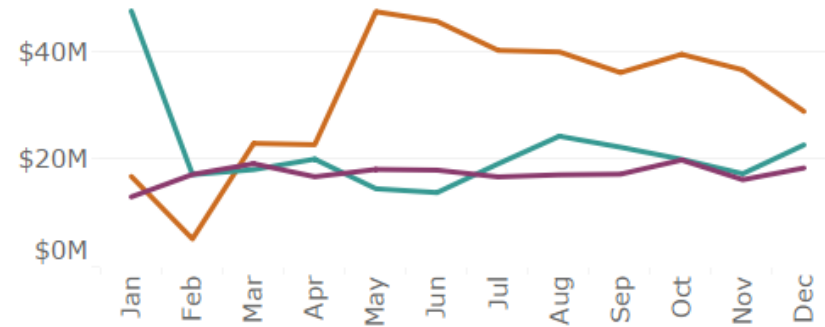
Hotel/Motel

2022 2023 2024



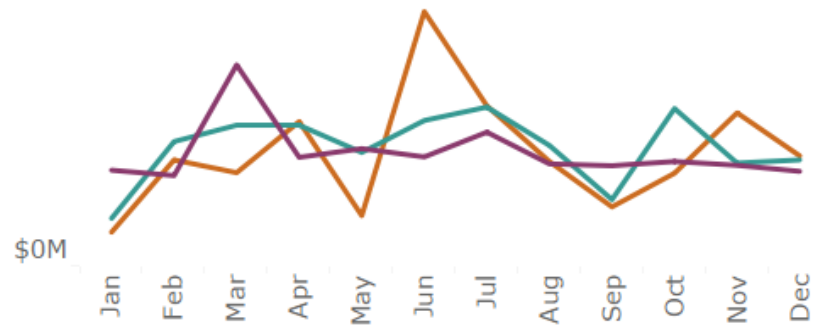
Retail

2022 2023 2024



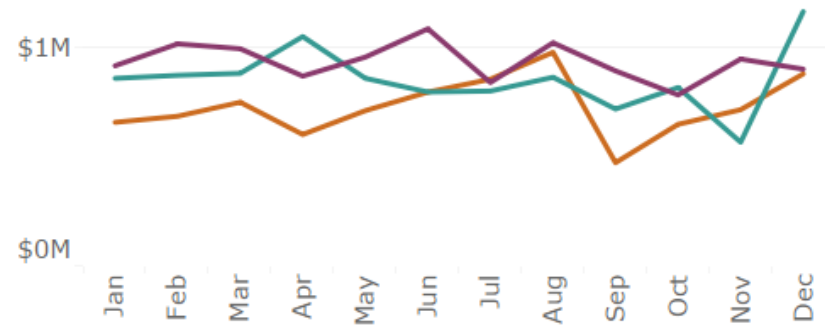
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



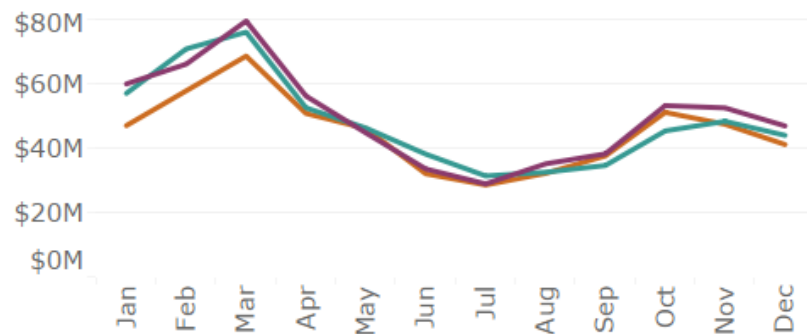
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Pima County



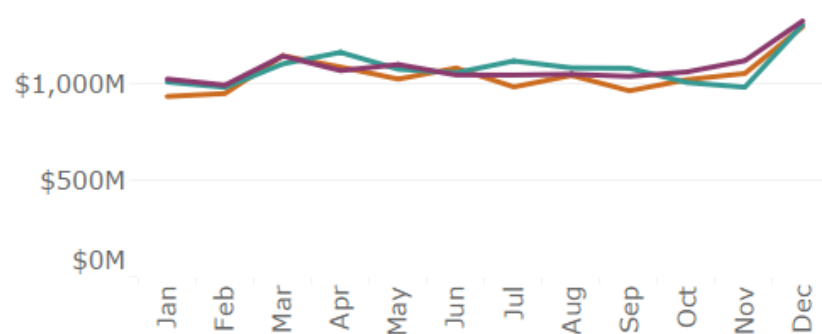
Hotel/Motel

2022 2023 2024



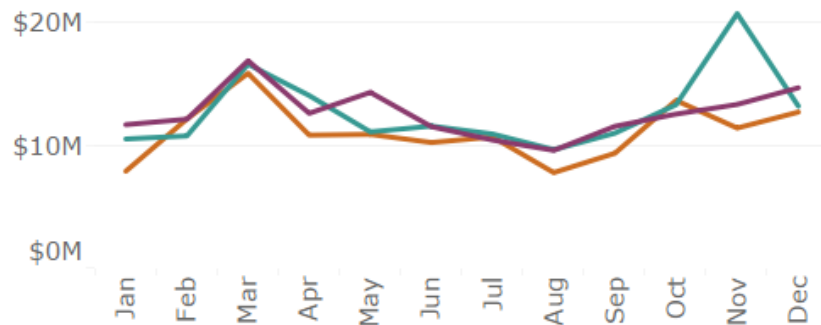
Retail

2022 2023 2024



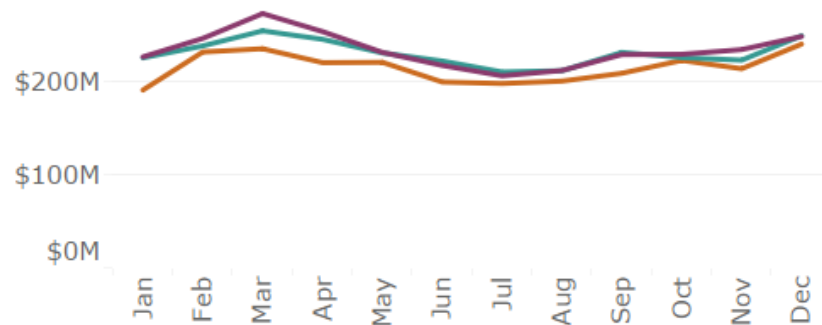
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



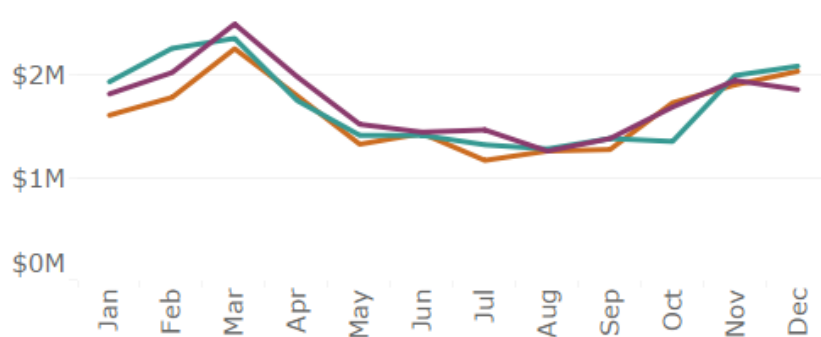
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Santa Cruz County



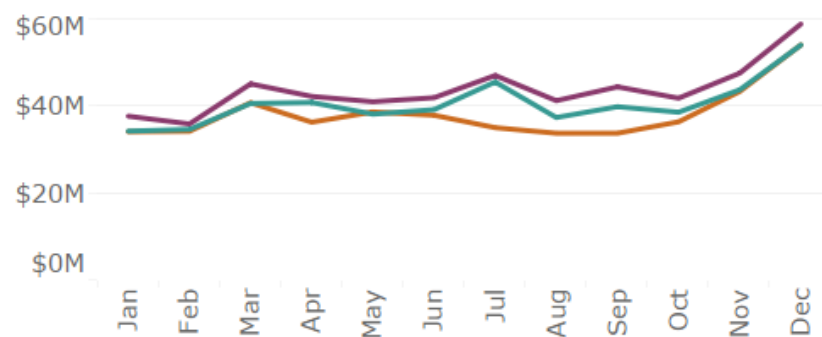
Hotel/Motel

2022 2023 2024



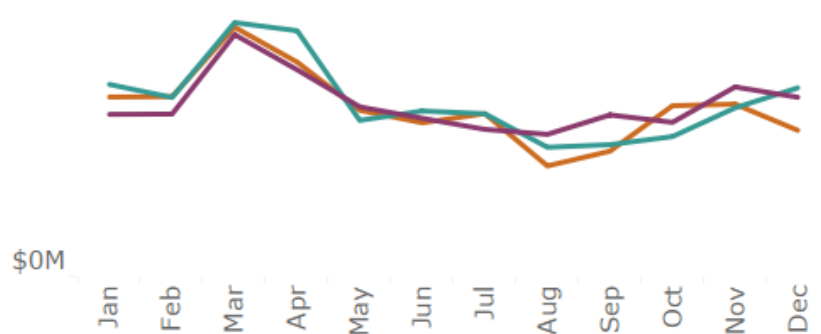
Retail

2022 2023 2024



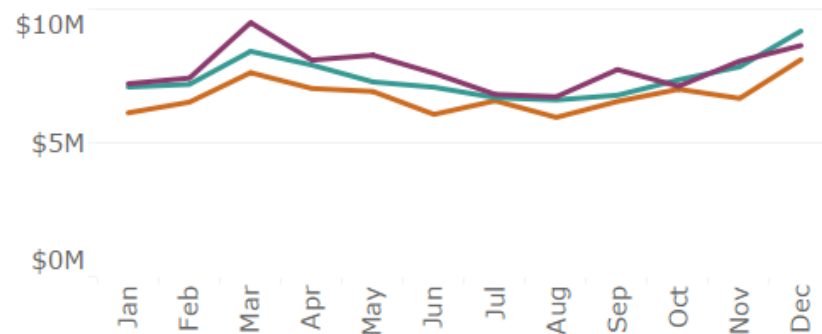
Amusement

2022 2023 2024



Restaurant

2022 2023 2024

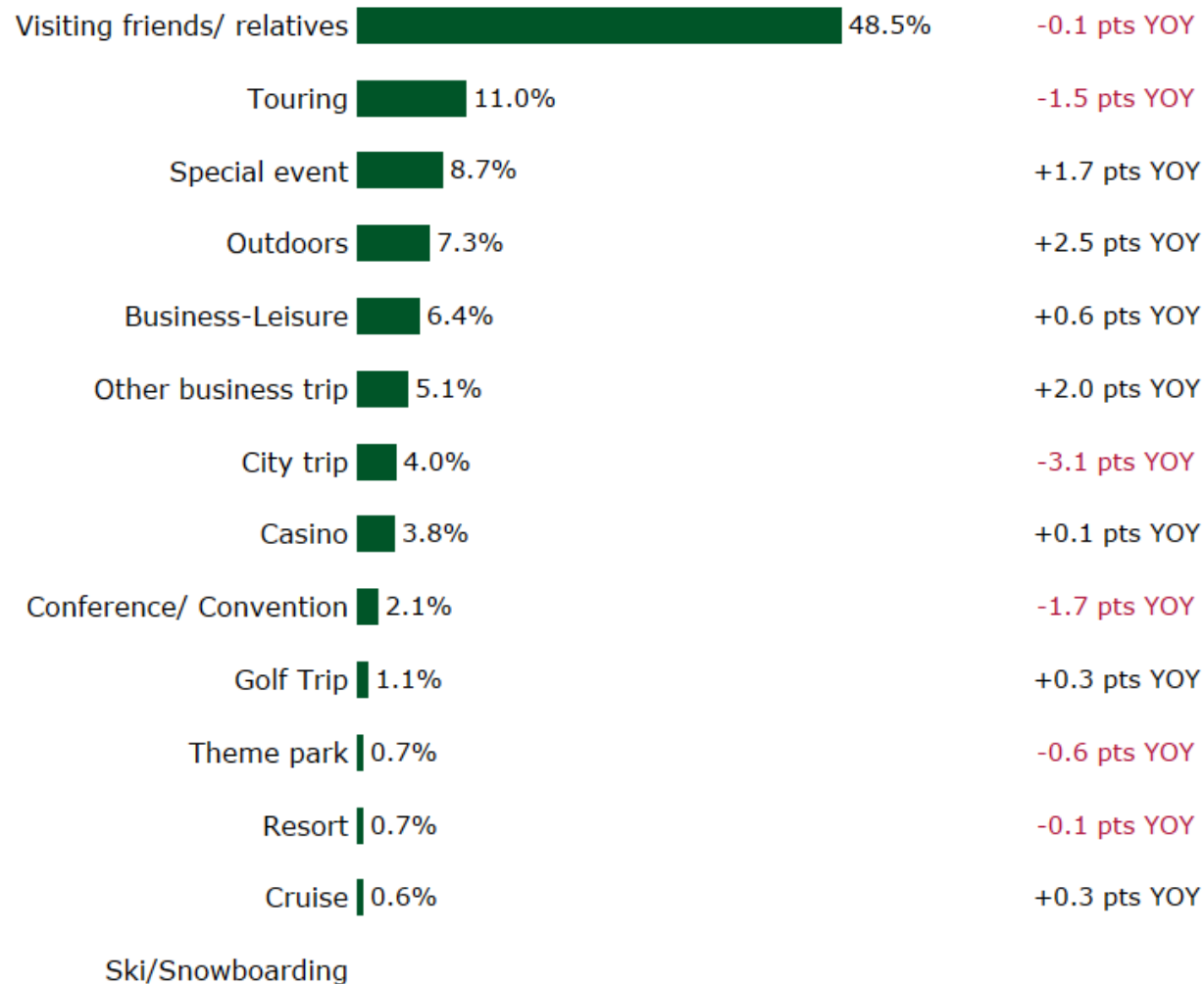


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Visitor Summary

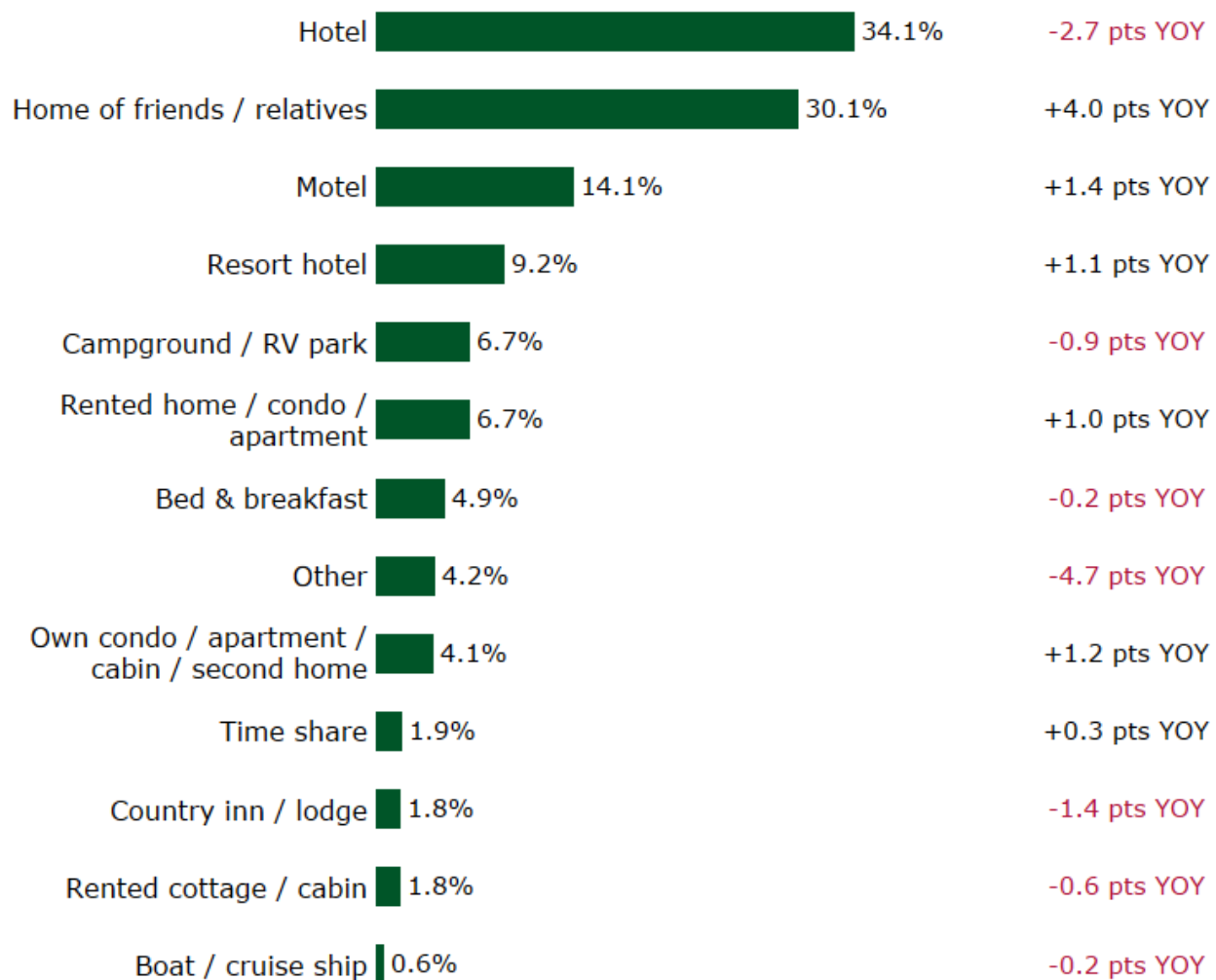


2024 Main Purpose of Trip: Tucson & Southern Region



Source: Longwoods

2024 Accommodation: Tucson & Southern Region



Source: Longwoods

2024 Visitor Summary: Cochise County



79.6%
Overnight Visitor Share

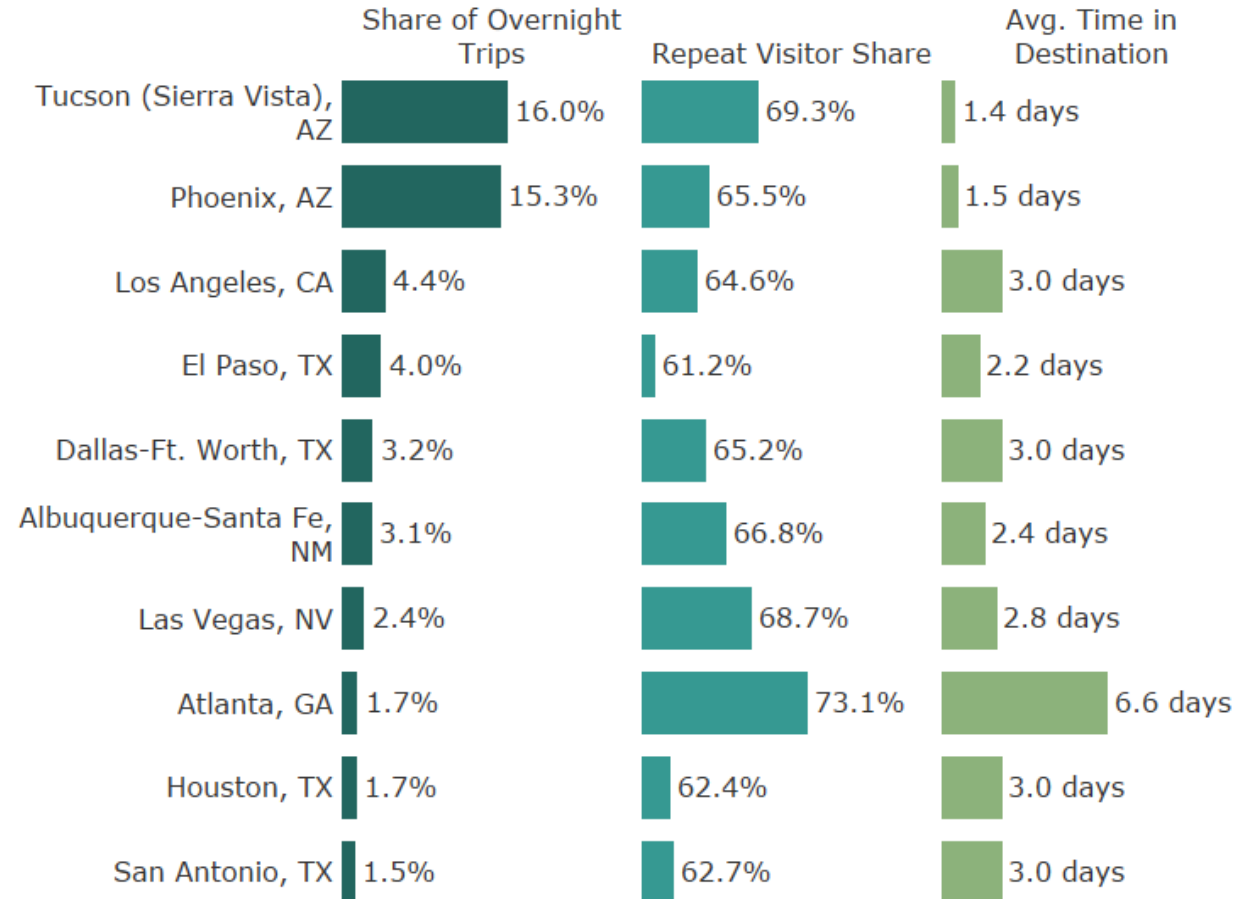


65.4%
Repeat Visitor Share



2.9 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

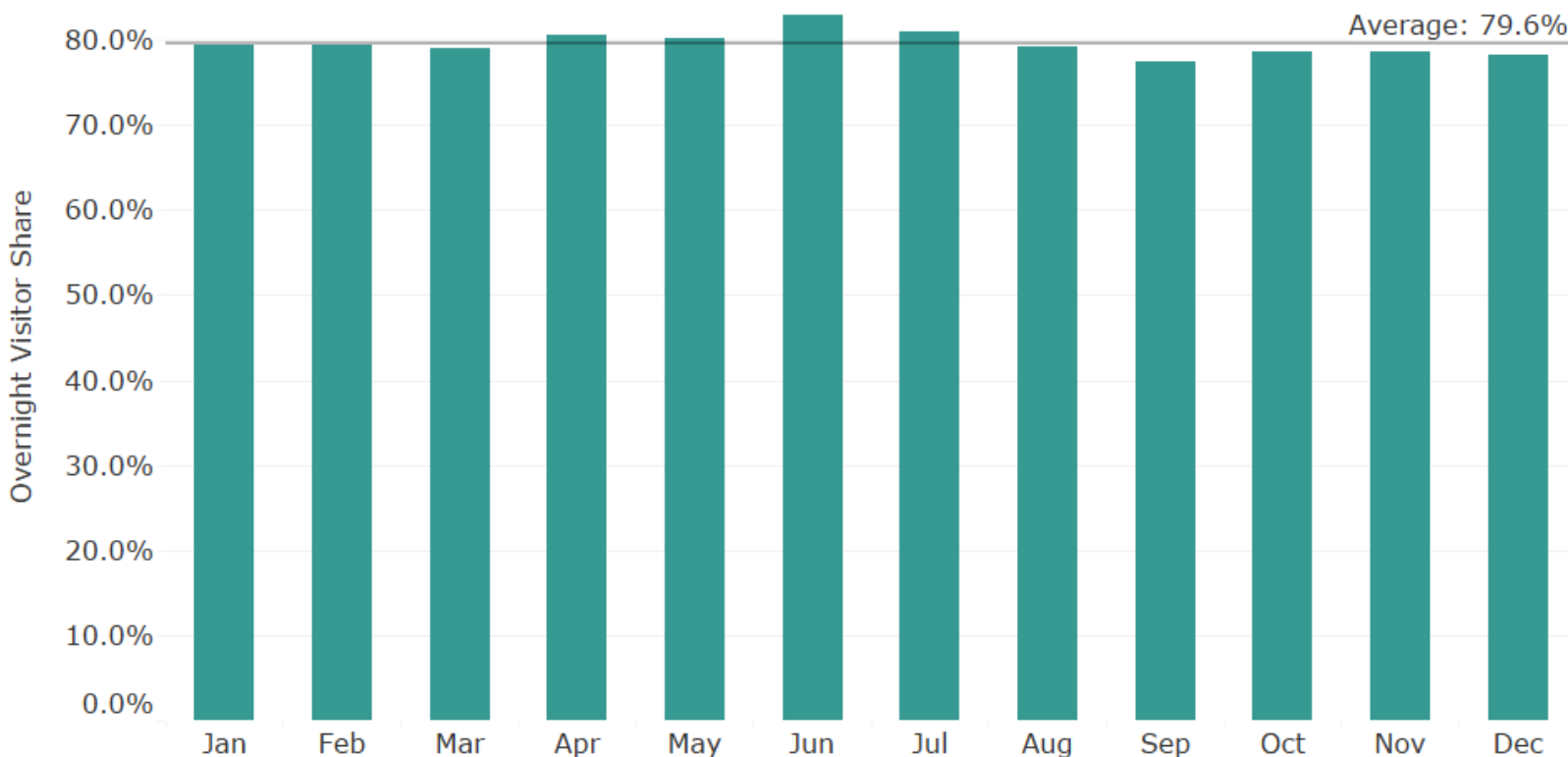


Source: Azira

Overnight Visitor Share: Cochise County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Graham County



76.6%
Overnight Visitor Share

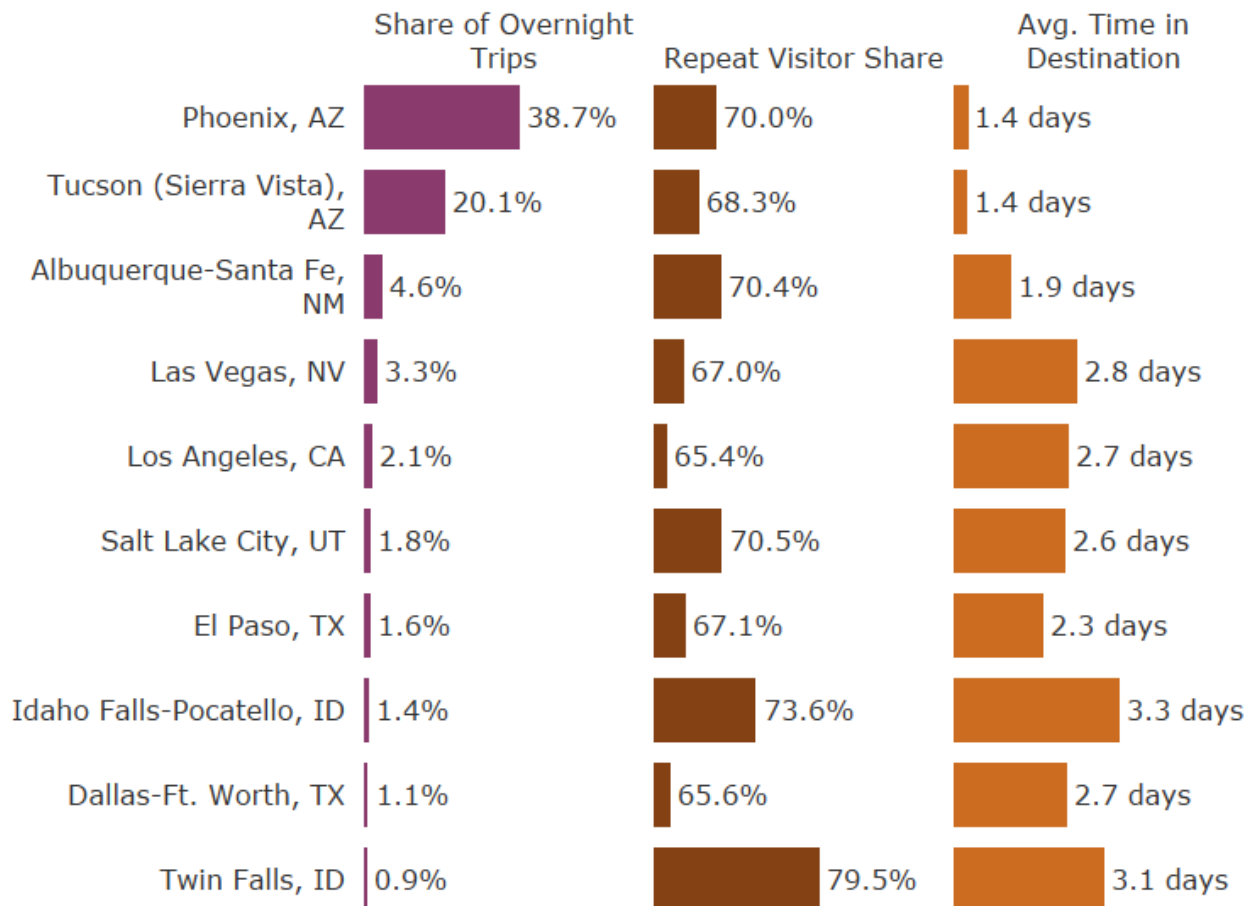


67.2%
Repeat Visitor Share



2.0 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

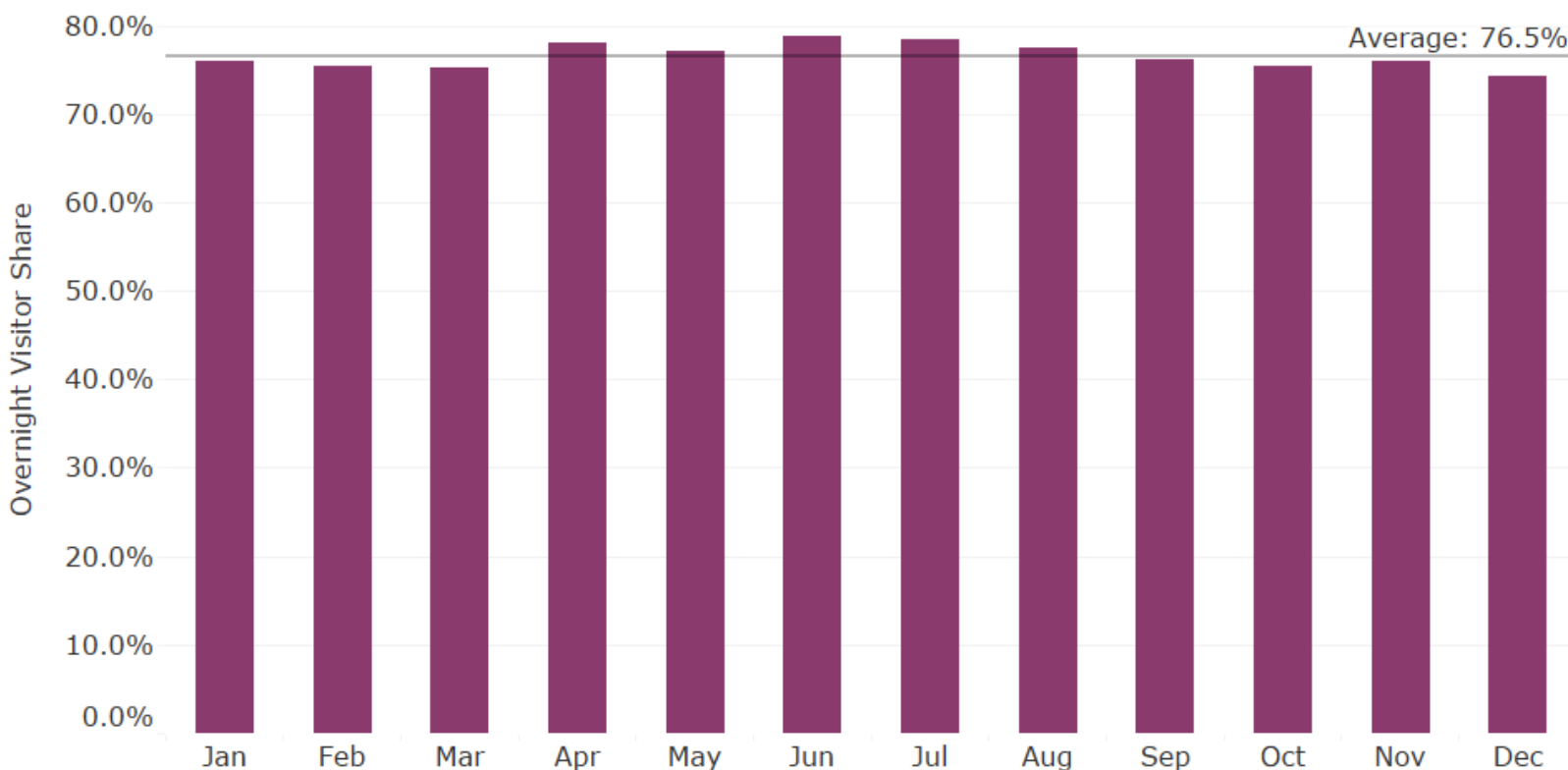


Source: Azira

Overnight Visitor Share: Graham County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Greenlee County



74.6%
Overnight Visitor Share



66.6%
Repeat Visitor Share



1.9 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

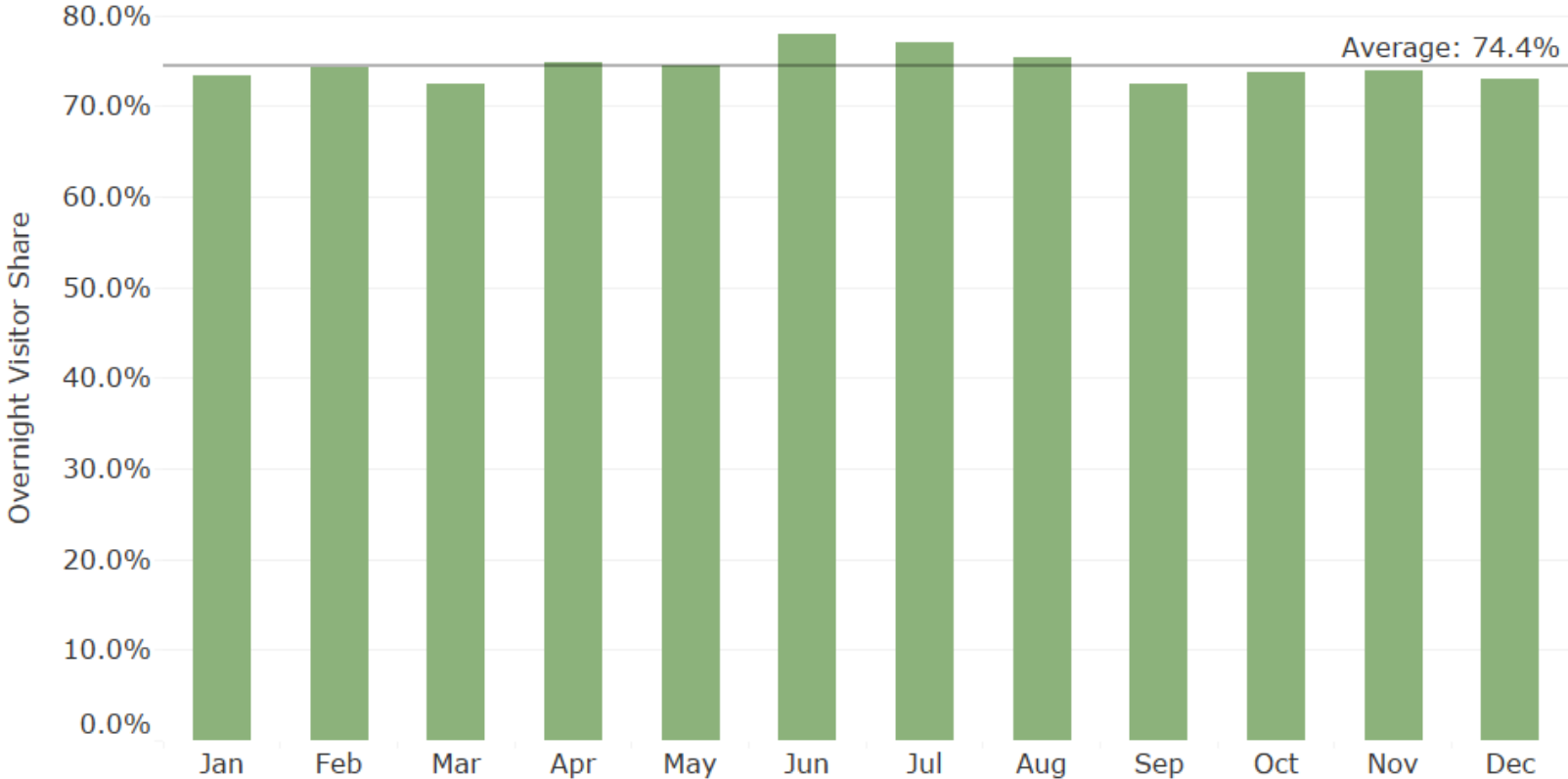
	Share of Overnight Trips	Repeat Visitor Share	Avg. Time in Destination
Phoenix, AZ	44.1%	71.1%	1.5 days
Tucson (Sierra Vista), AZ	14.0%	66.0%	1.5 days
Albuquerque-Santa Fe, NM	9.9%	71.7%	1.9 days
Las Vegas, NV	3.1%	62.5%	2.7 days
El Paso, TX	2.5%	62.5%	1.8 days
Los Angeles, CA	1.9%	67.7%	2.5 days
Dallas-Ft. Worth, TX	1.2%	64.5%	2.4 days
New York, NY		49.5%	6.2 days
Chicago, IL		59.4%	6.7 days
Salt Lake City, UT		65.8%	2.8 days

Source: Azira

Overnight Visitor Share: Greenlee County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Pima County



82.8%
Overnight Visitor Share

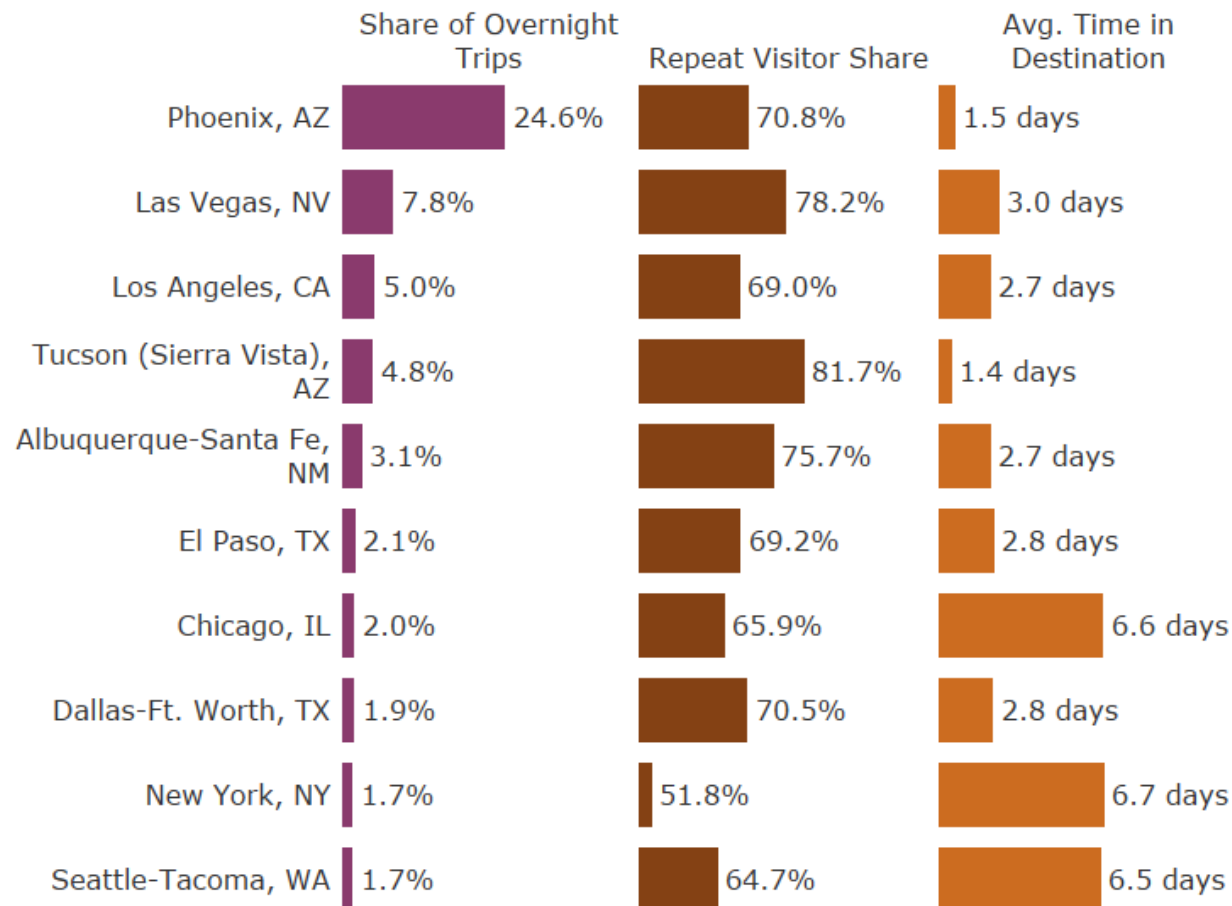


68.6%
Repeat Visitor Share



3.2 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

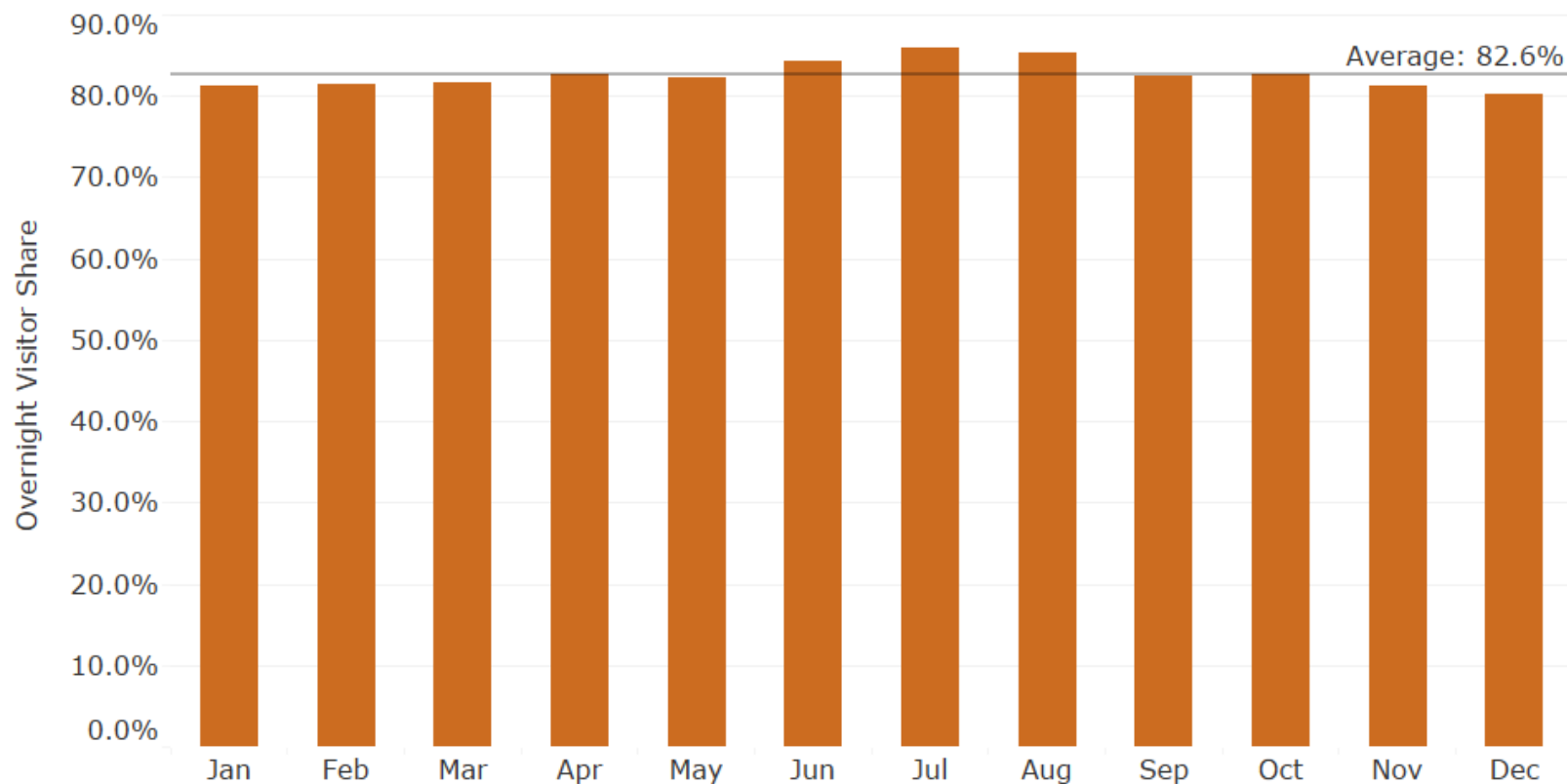


Source: Azira

Overnight Visitor Share: Pima County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Santa Cruz County



70.4%
Overnight Visitor Share



66.8%
Repeat Visitor Share



1.8 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

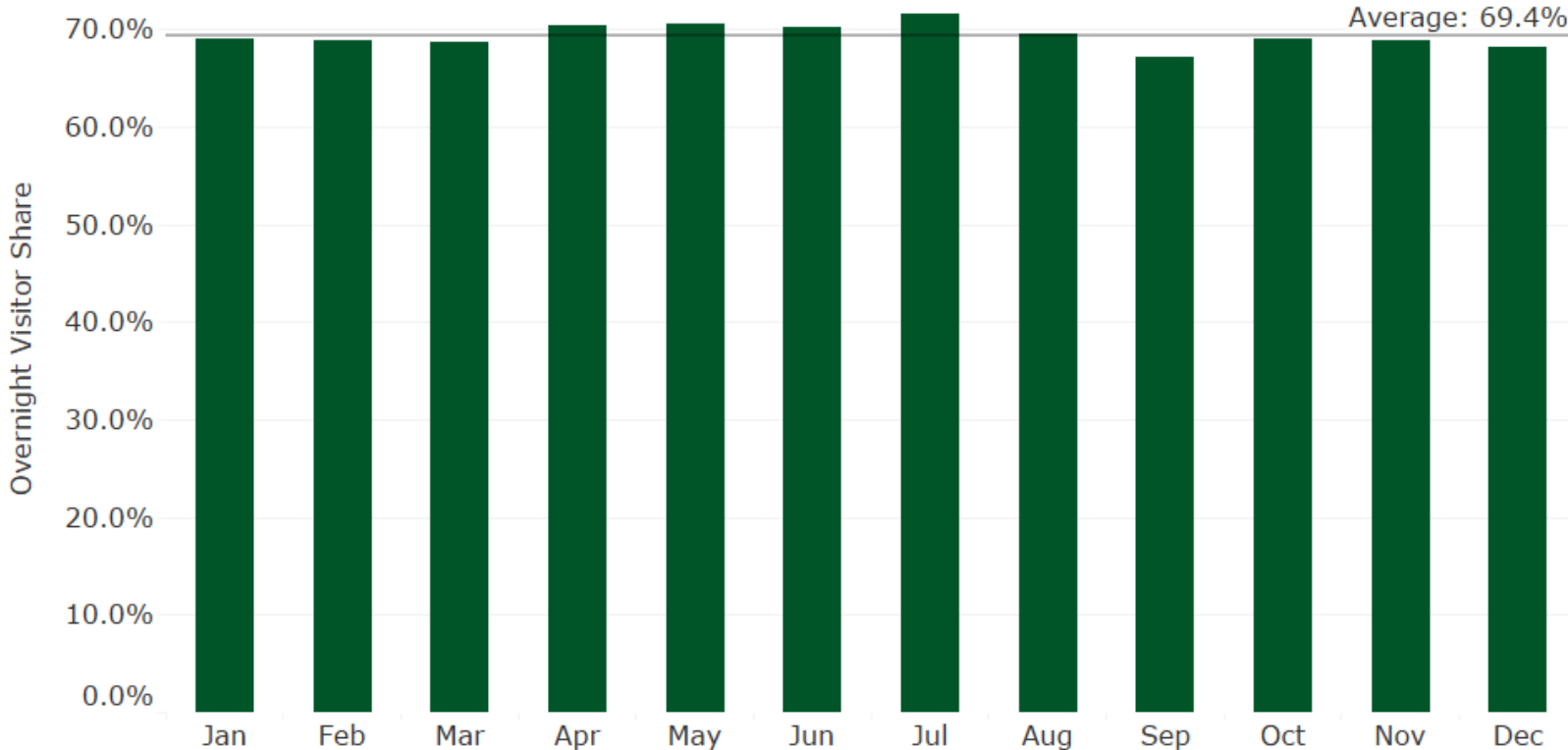
	Share of Overnight Trips	Repeat Visitor Share	Avg. Time in Destination
Tucson (Sierra Vista), AZ	45.5%	69.1%	1.3 days
Phoenix, AZ	16.0%	64.8%	1.3 days
Los Angeles, CA	3.0%	67.4%	2.6 days
Las Vegas, NV	2.1%	67.3%	2.6 days
Albuquerque-Santa Fe, NM	1.6%	71.5%	2.2 days
El Paso, TX	1.4%	68.3%	2.5 days
Chicago, IL	1.1%	73.4%	6.0 days
Dallas-Ft. Worth, TX	0.9%	67.5%	2.4 days
San Diego, CA	0.9%	68.3%	2.6 days
Salt Lake City, UT	0.8%	72.5%	2.4 days

Source: Azira

Overnight Visitor Share: Santa Cruz County



2024 Overnight Visitor Share Monthly Trend



Source: Azira