

WEST COAST REGION

TRAVEL RESEARCH TRENDS



Arizona Travel Impact



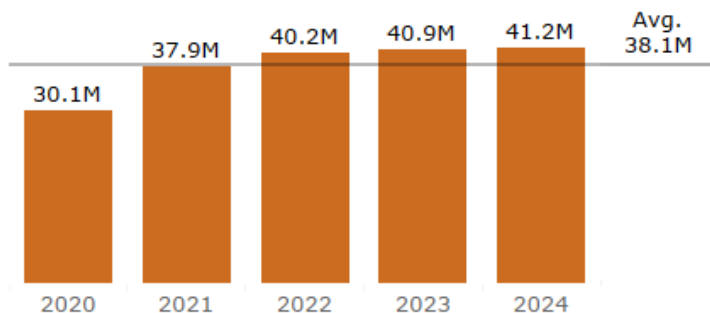
State Domestic Travel Impact



2024 Total Overnight Visitors

41.2M

+0.7% YOY | +1.3% vs. 2019



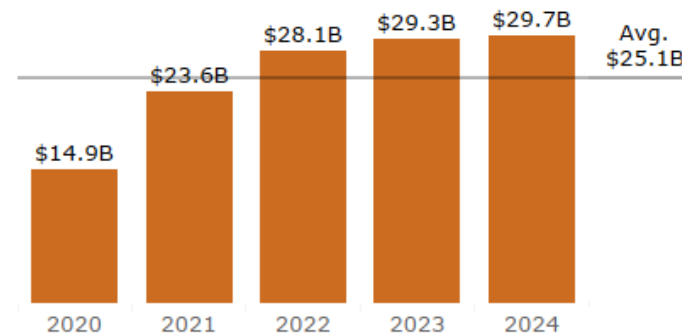
Source: Tourism Economics



2024 Total Spending

\$29.7B

+1.4% YOY | +16.2% vs. 2019

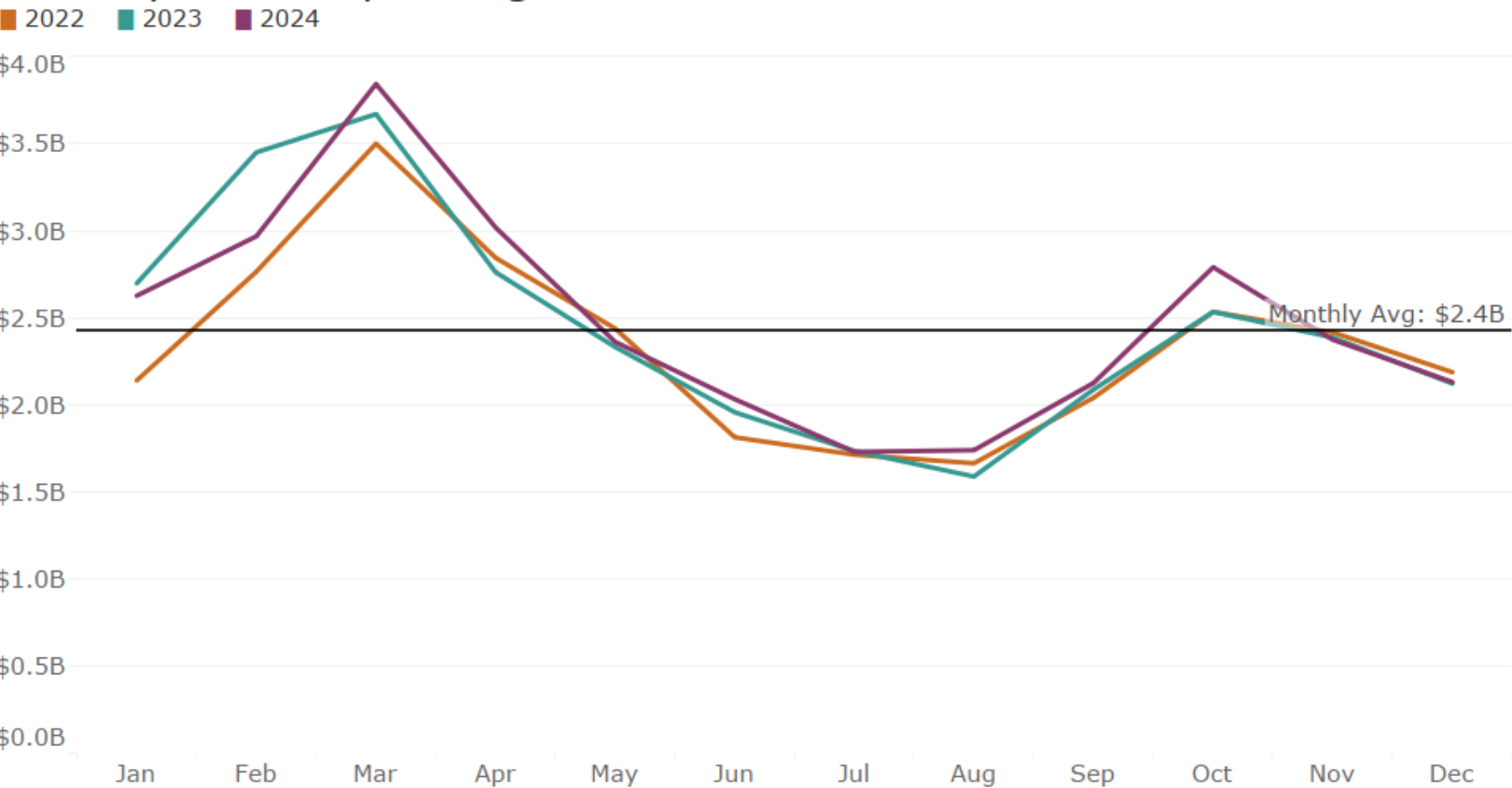


Source: Dean Runyan Associates

State Domestic Travel Impact



Monthly Travel Spending Trend



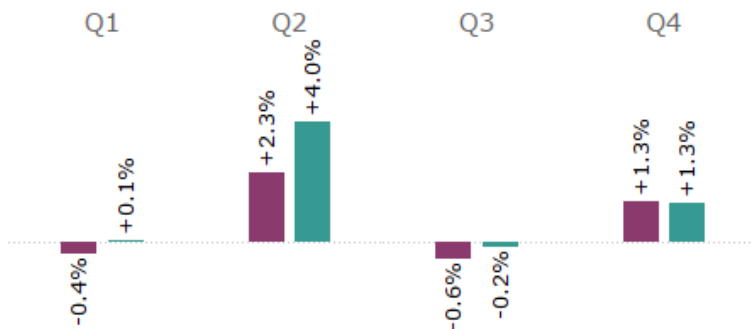
Source: Dean Runyan Associates

State Domestic Travel Impact

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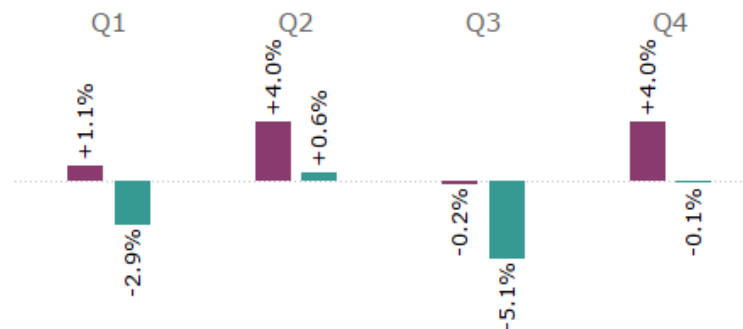
All Overnight Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



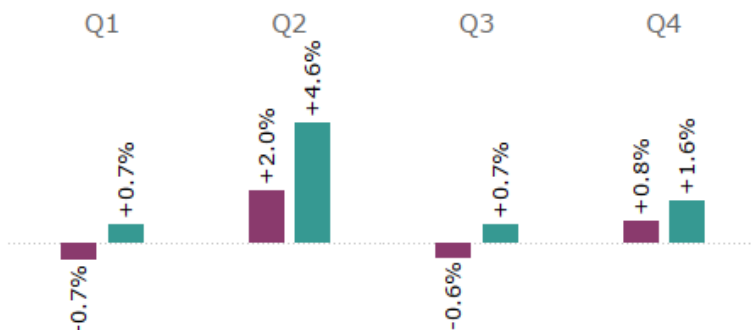
Overnight Business Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



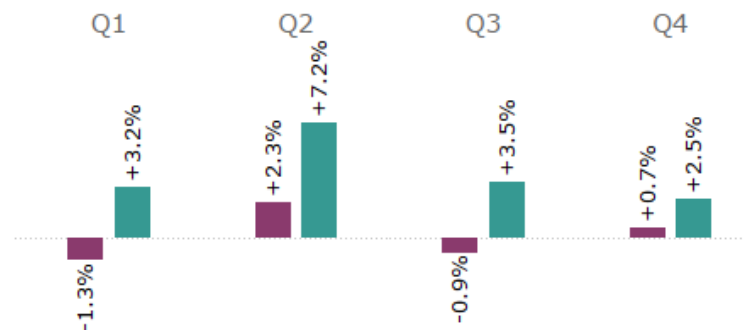
Overnight Leisure Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019



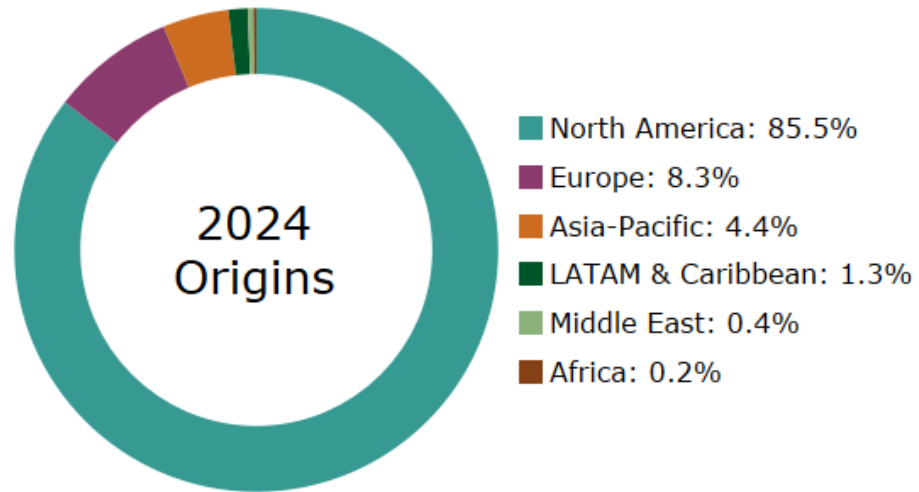
Overnight Resident Visitors

■ 2024 vs. 2023 ■ 2024 vs. 2019

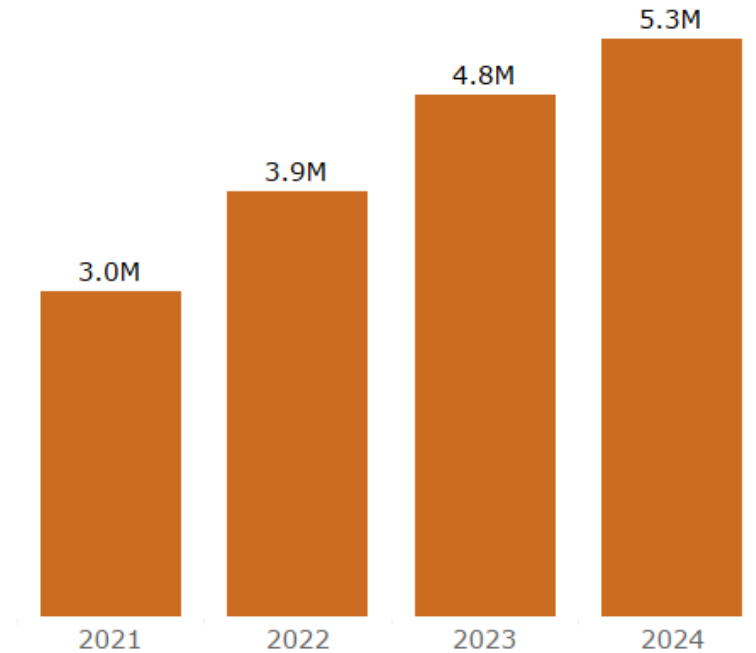


Source: Tourism Economics

State International Travel Impact



Annual International Overnight Visits
Last 4 years



Source: Tourism Economics International State Travel

Travel Impact by County



2024 Total Spending: West Coast Region



Mohave
\$835.4M
+0.0% YOY

La Paz
\$186.6M
-0.8% YOY

Yuma
\$741.8M
-1.7% YOY



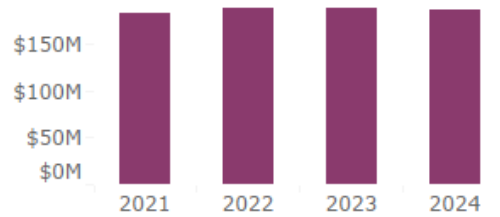
Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: La Paz County



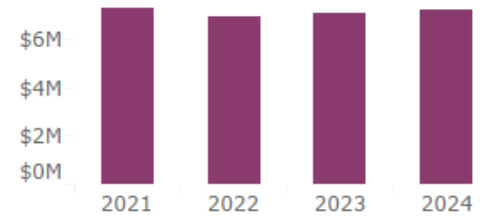
Direct Travel Spending

-\$1.6M
-0.8% YOY



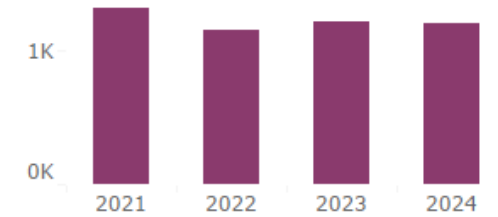
Local Tax Receipts

+\$135.7K
+1.9% YOY



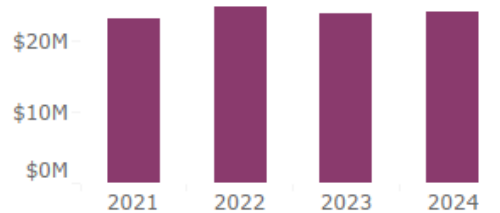
Employment

-10
-0.8% YOY



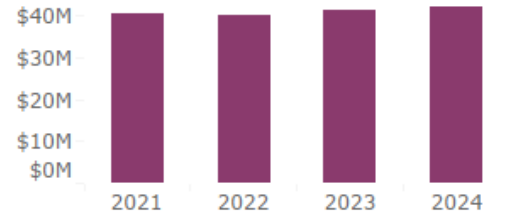
Accommodations Spending

+\$19.3K
+0.1% YOY



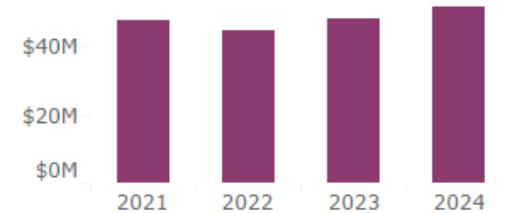
Food Service Spending

+\$598.3K
+1.4% YOY



Earnings

+\$3.4M
+7.1% YOY



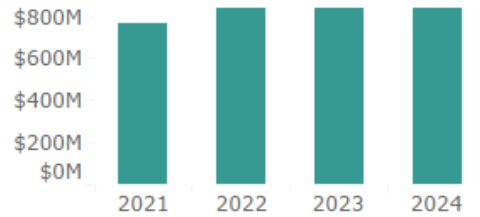
Source: Arizona Travel Impacts, Dean Runyan Associates

Travel Impacts: Mohave County



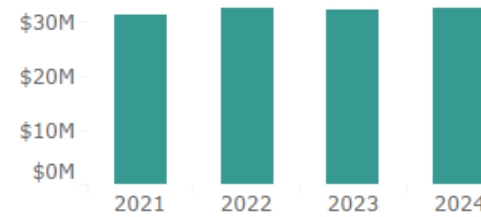
Direct Travel Spending

-\$53.0K
+0.0% YOY



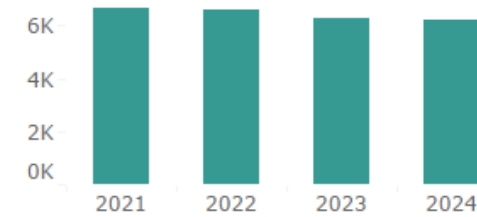
Local Tax Receipts

+\$266.1K
+0.8% YOY



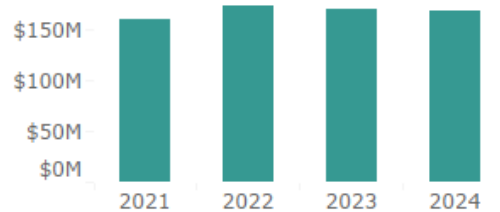
Employment

-40
-0.6% YOY



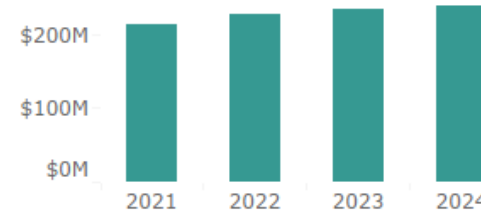
Accommodations Spending

-\$1.8M
-1.1% YOY



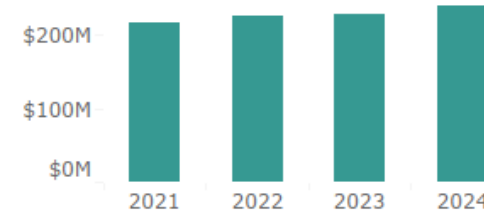
Food Service Spending

+\$4.5M
+1.9% YOY



Earnings

+\$10.1M
+4.4% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

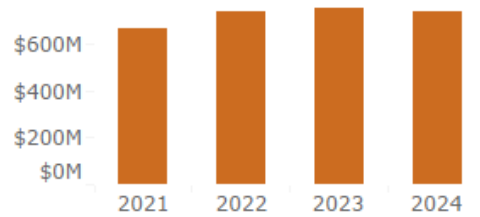
Travel Impacts: Yuma County



Direct Travel Spending

-\$12.7M

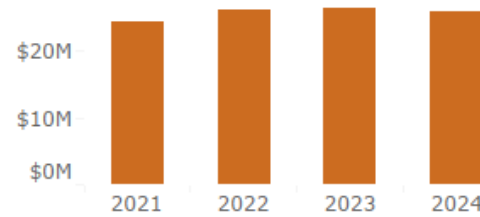
-1.7% YOY



Local Tax Receipts

-\$450.3K

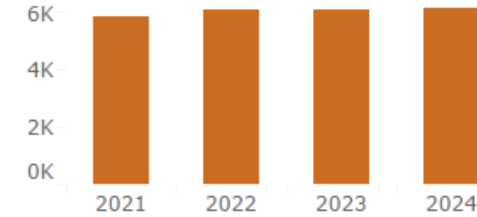
-1.7% YOY



Employment

+30

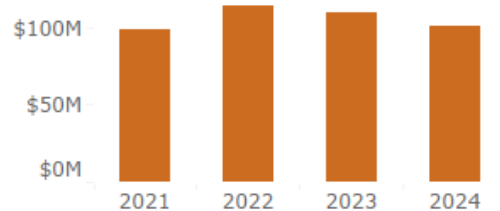
+0.5% YOY



Accommodations Spending

-\$9.5M

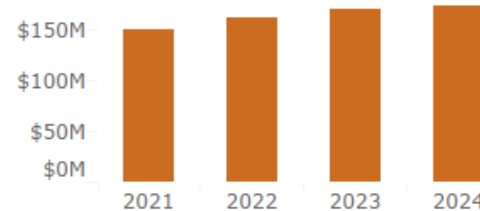
-8.6% YOY



Food Service Spending

+\$3.7M

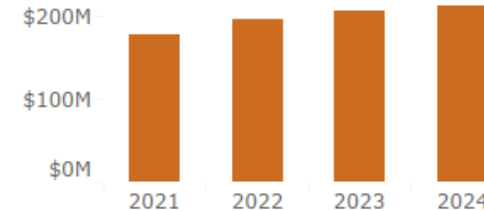
+2.2% YOY



Earnings

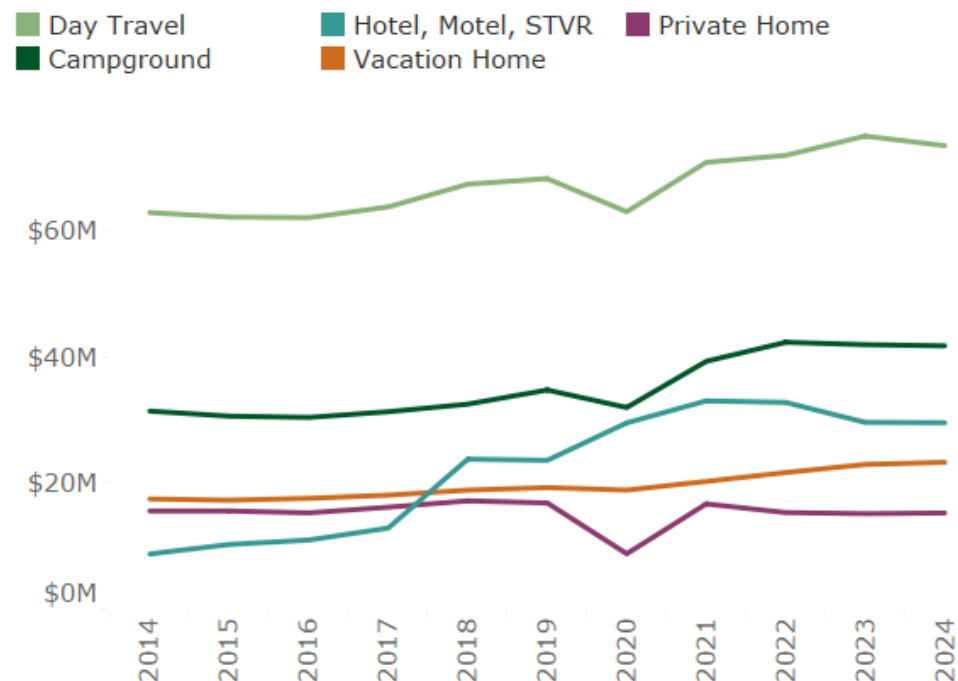
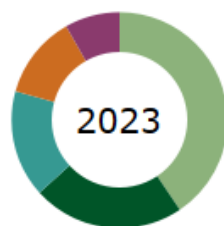
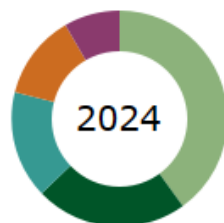
+\$4.8M

+2.3% YOY



Source: Arizona Travel Impacts, Dean Runyan Associates

Spend by Accommodation Type: La Paz County

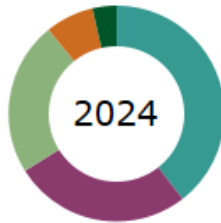


Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

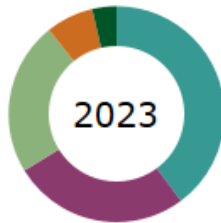
Spend by Accommodation Type: Mohave County

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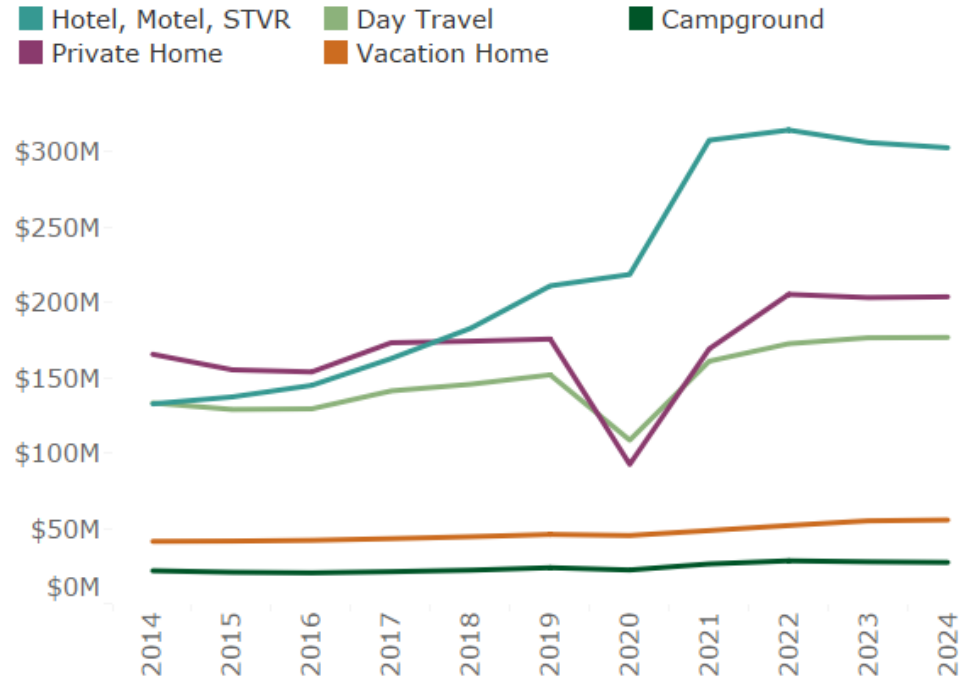
2024

Hotel, Motel, STVR: 39.5%
Private Home: 26.6%
Day Travel: 23.1%
Vacation Home: 7.2%
Campground: 3.6%



2023

Hotel, Motel, STVR: 39.8%
Private Home: 26.4%
Day Travel: 23.0%
Vacation Home: 7.2%
Campground: 3.6%

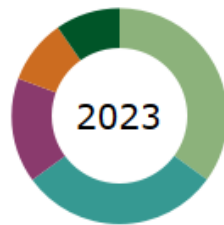
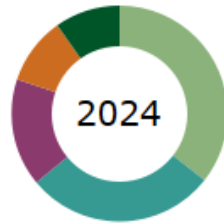


Source: Arizona Travel Impacts, Dean Runyan Associates

* STVR stands for Short-Term Vacation Rental

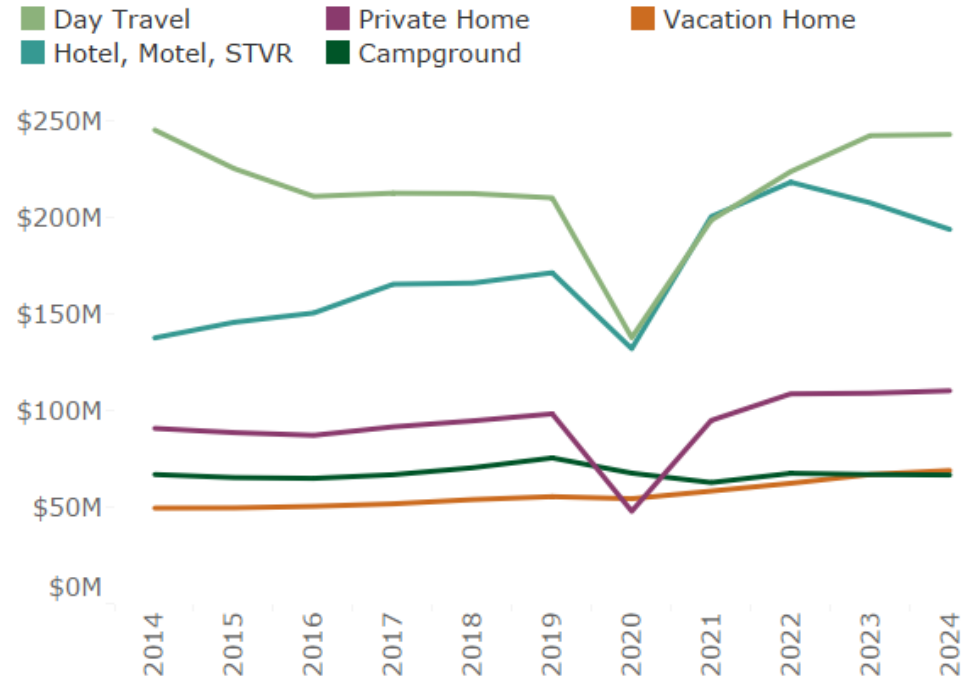
Spend by Accommodation Type: Yuma County

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Day Travel: 35.6%
Hotel, Motel, STVR: 28.4%
Private Home: 16.1%
Vacation Home: 10.1%
Campground: 9.8%

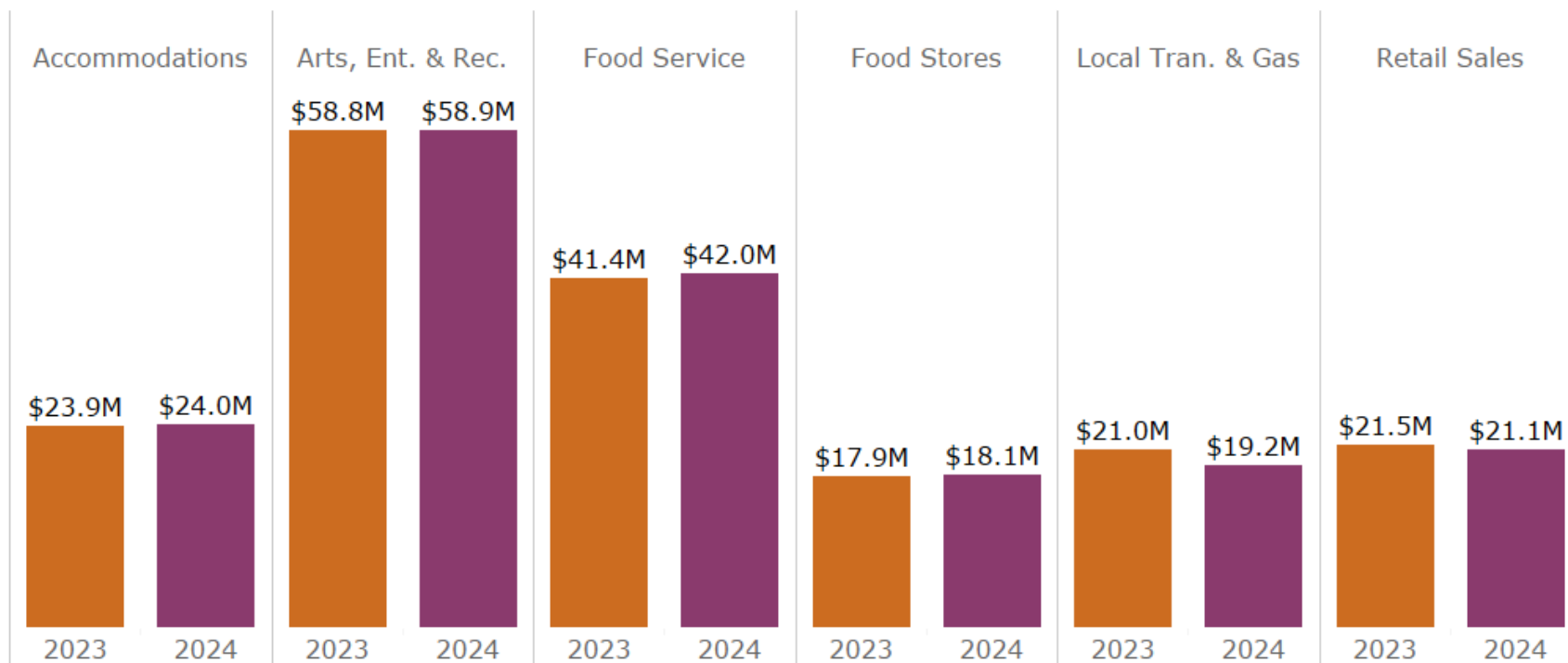
Day Travel: 35.0%
Hotel, Motel, STVR: 30.0%
Private Home: 15.7%
Campground: 9.7%
Vacation Home: 9.7%



Source: Arizona Travel Impacts, Dean Runyan Associates

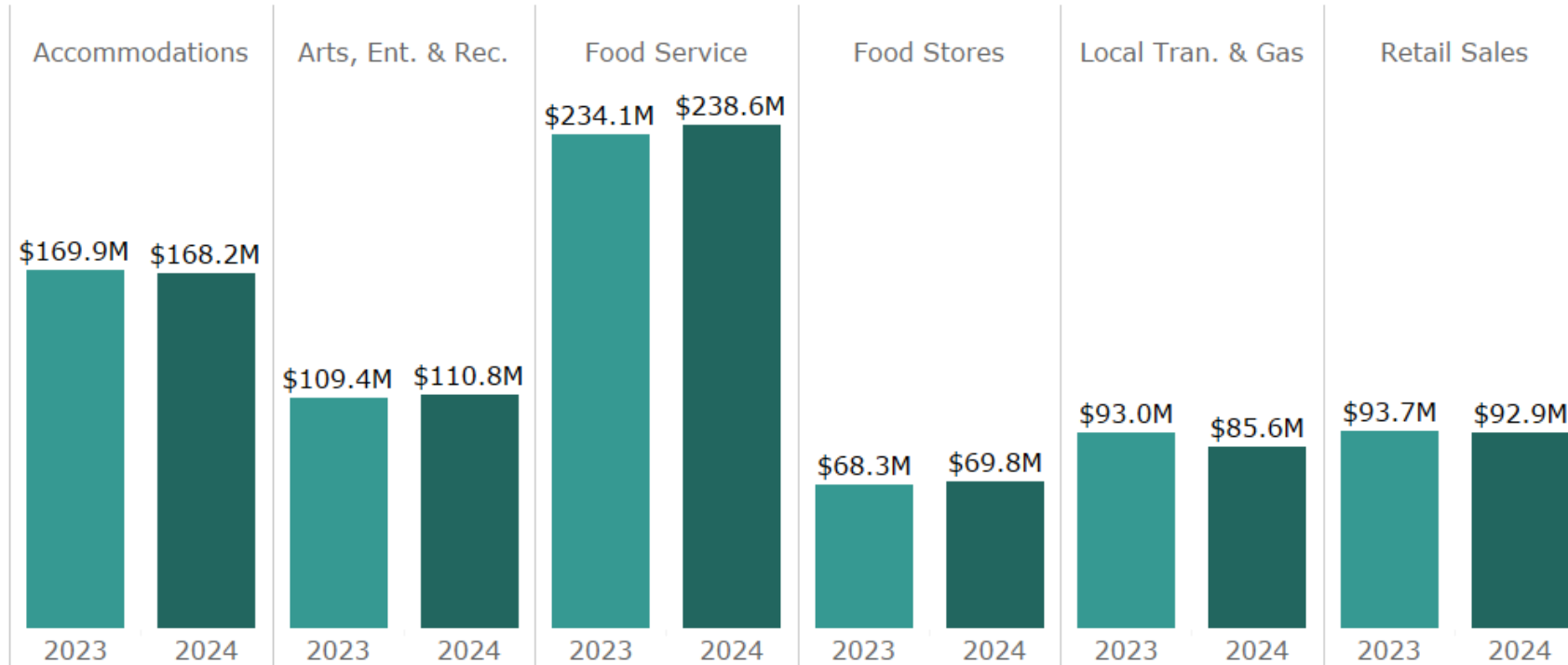
* STVR stands for Short-Term Vacation Rental

Spend by Commodity: La Paz County



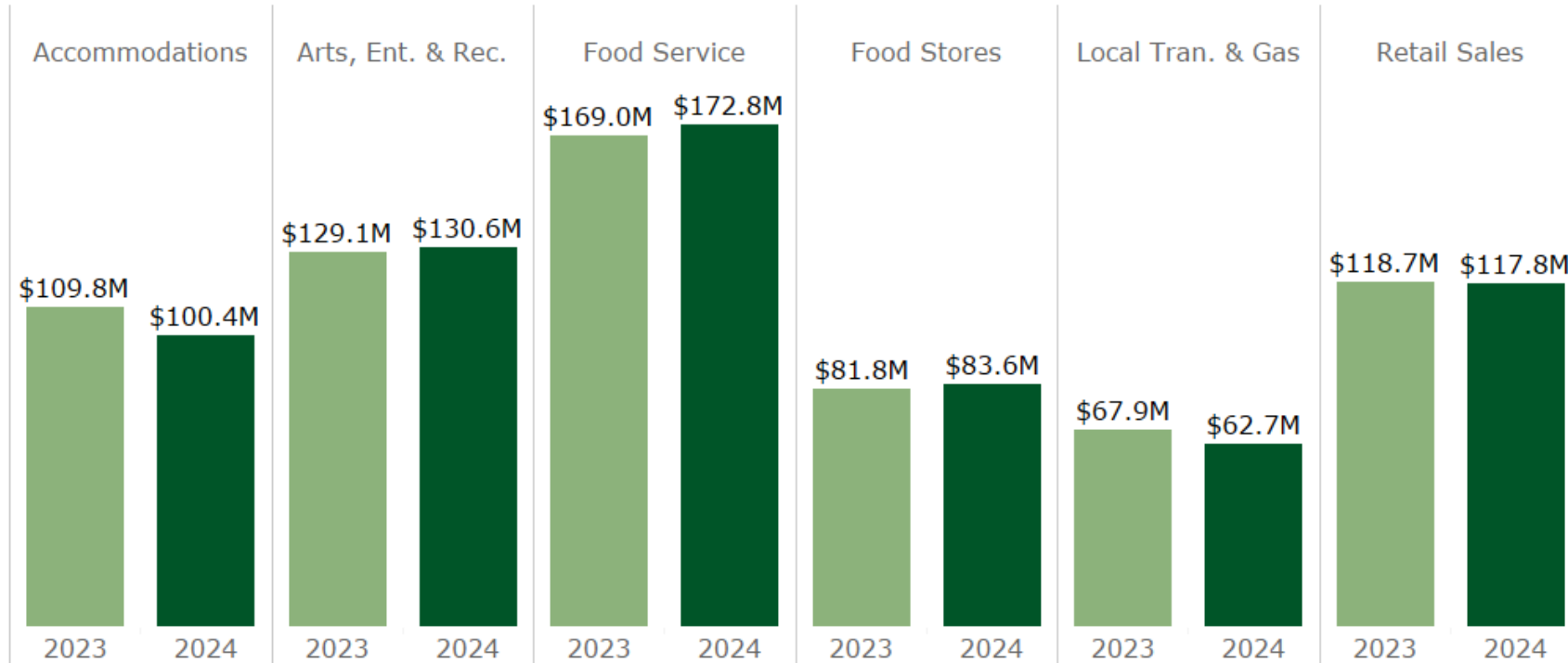
Source: Arizona Travel Impacts, Dean Runyan Associates

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



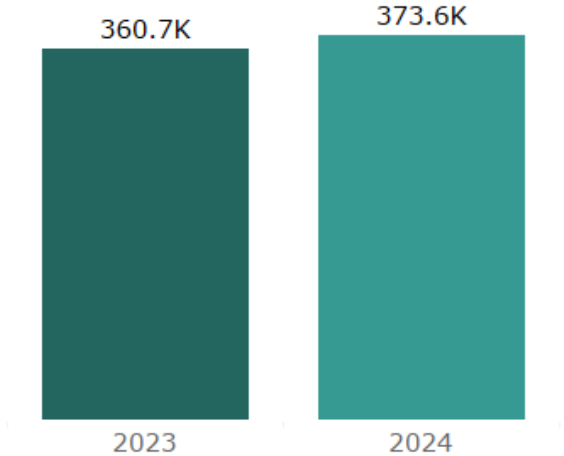
Year-to-Date Supply

Jan - Dec All Properties Available



Year-to-Date Demand

Jan - Dec Nights Sold at All Properties



Source: AirDNA

Airport Passenger Traffic

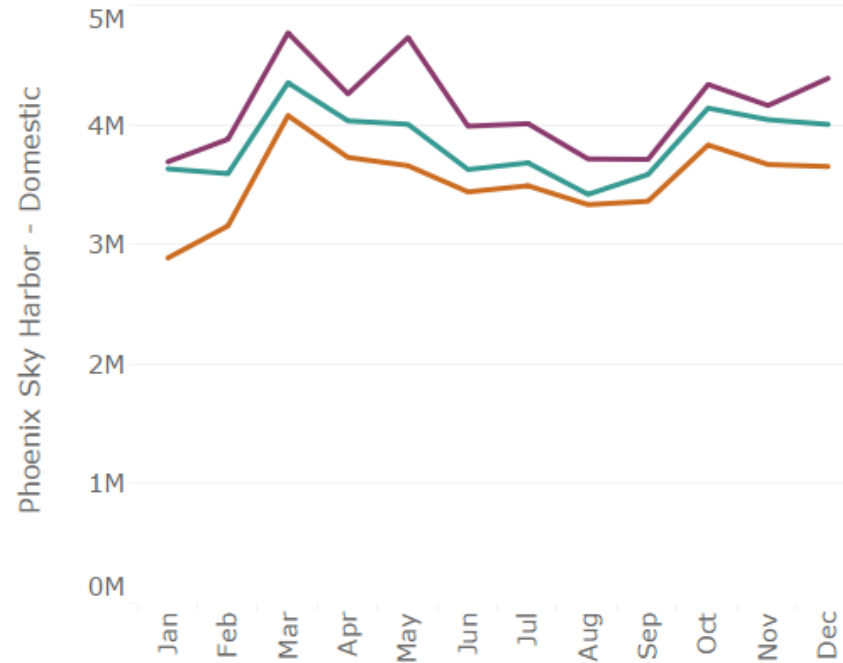


Airport Passengers: West Coast Region

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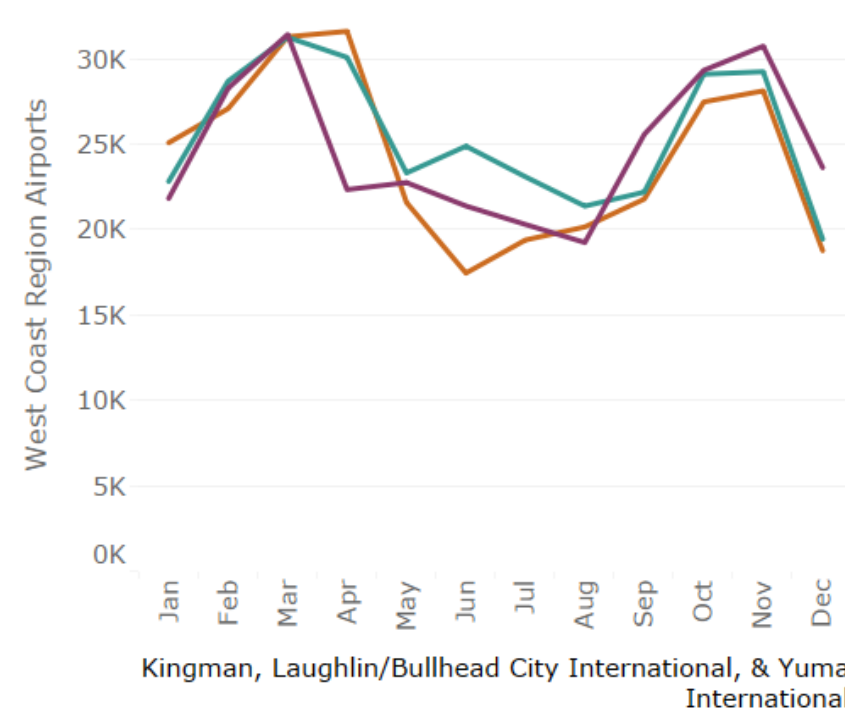
Airport Hub

2022 2023 2024



Region Airports

2022 2023 2024



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

National & State Parks

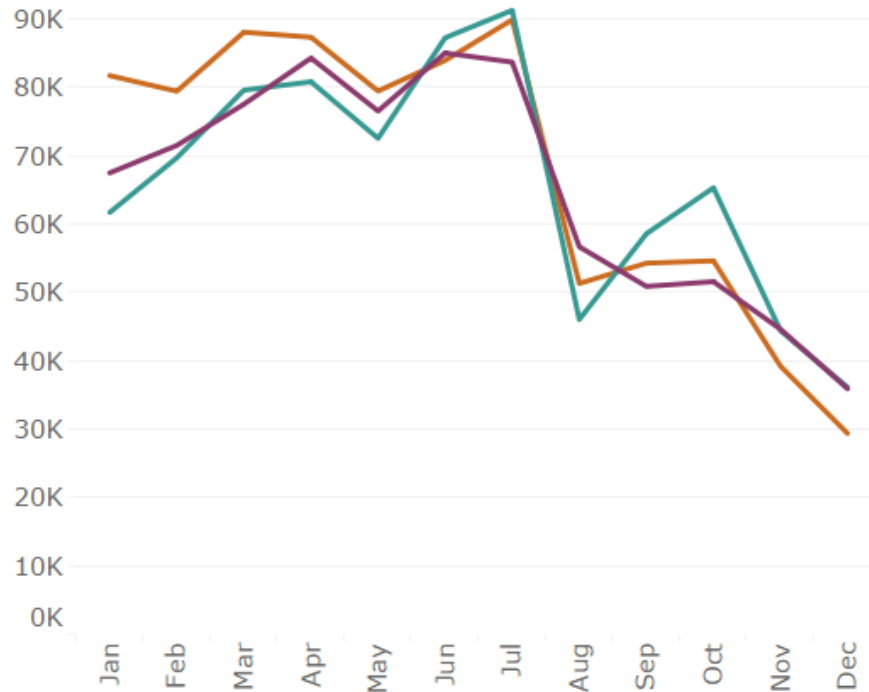


State Parks: West Coast Region



State Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change

Lake Havasu SP	468.5K	-3.3% YOY
Cattail Cove SP	84.0K	+5.0% YOY
Alamo Lake SP	77.6K	+18.0% YOY
Buckskin Mountain SP	62.7K	+1.4% YOY
Yuma Territorial Prison SHP	51.3K	-8.4% YOY
River Island SP	30.1K	+20.2% YOY
Colorado River SHP	11.4K	-42.9% YOY

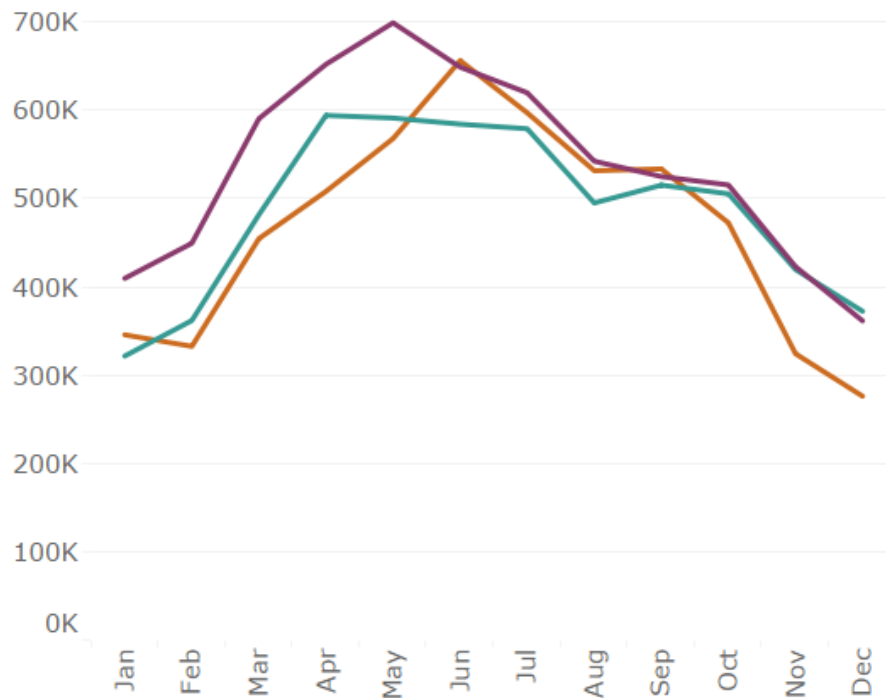
Source: Northern Arizona University, Arizona State Parks

National Parks: West Coast Region



National Parks Visitation Monthly Trend

2022 2023 2024



Year-to-Date Park Visitation

2024 Visits & YOY % Change

Lake Mead NRA

6.4M

+10.6% YOY

Pipe Spring NM

24.5K

+2.1% YOY

Source: Northern Arizona University, National Park Service

Gross Sales

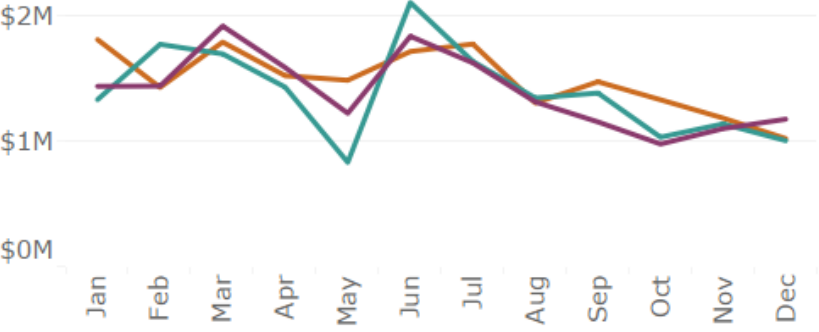


Gross Sales: La Paz County



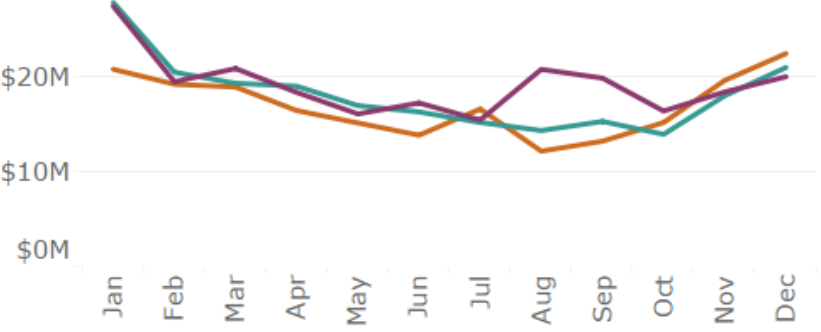
Hotel/Motel

2022 2023 2024



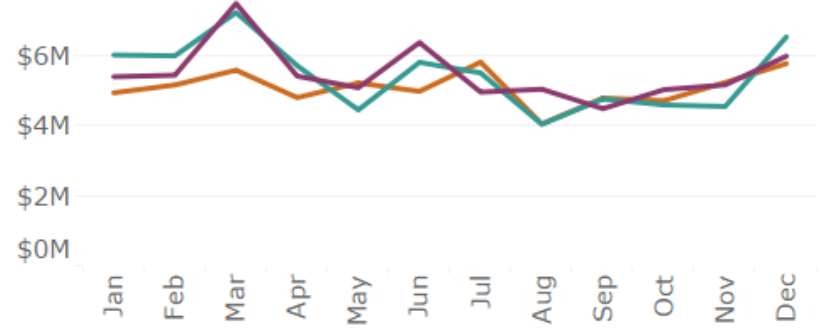
Retail

2022 2023 2024



Restaurant

2022 2023 2024



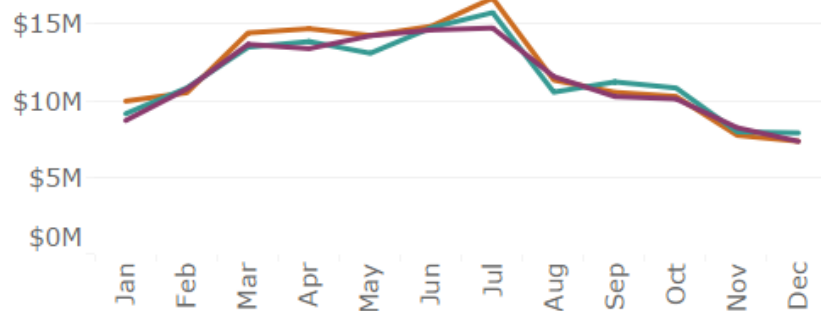
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Mohave County



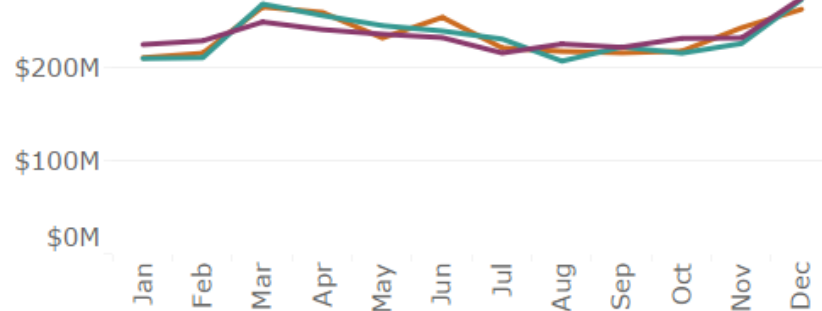
Hotel/Motel

2022 2023 2024



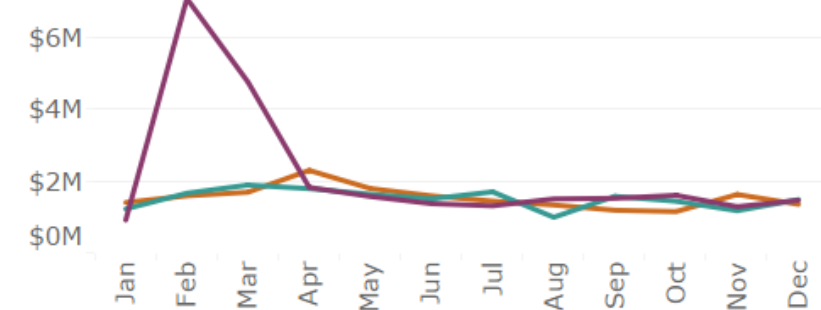
Retail

2022 2023 2024



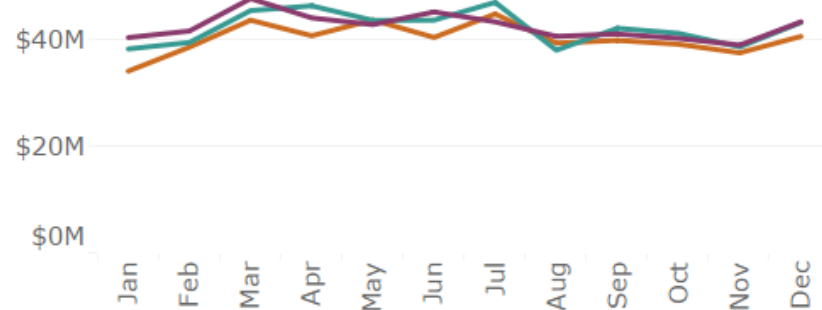
Amusement

2022 2023 2024



Restaurant

2022 2023 2024



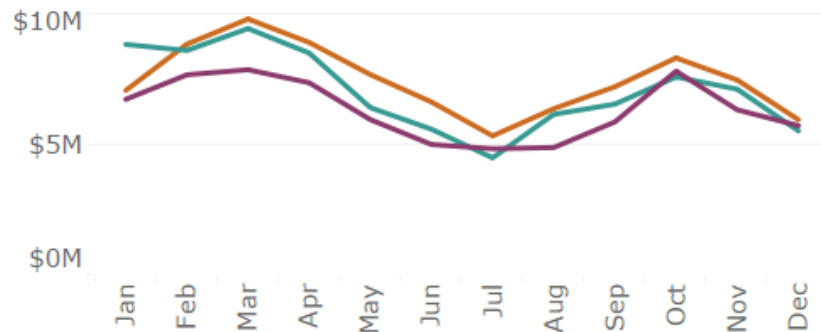
Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Gross Sales: Yuma County



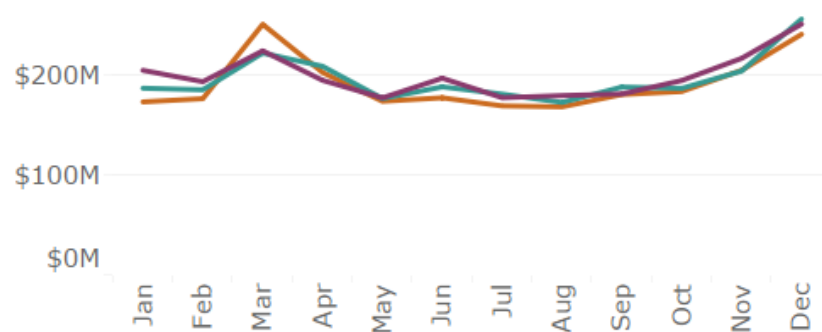
Hotel/Motel

2022 2023 2024



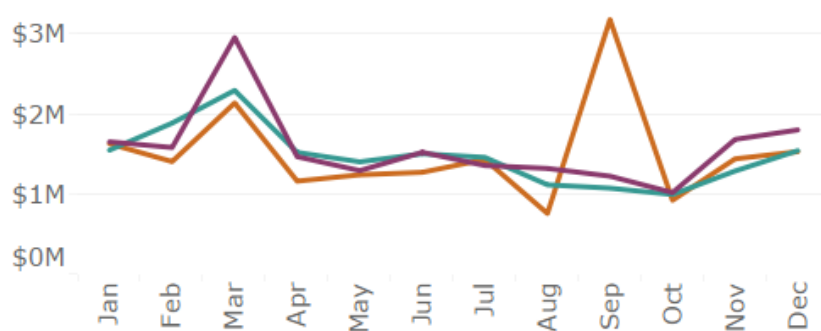
Retail

2022 2023 2024



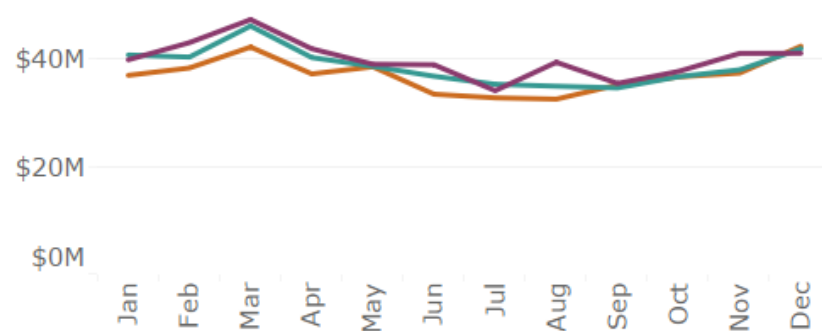
Amusement

2022 2023 2024



Restaurant

2022 2023 2024

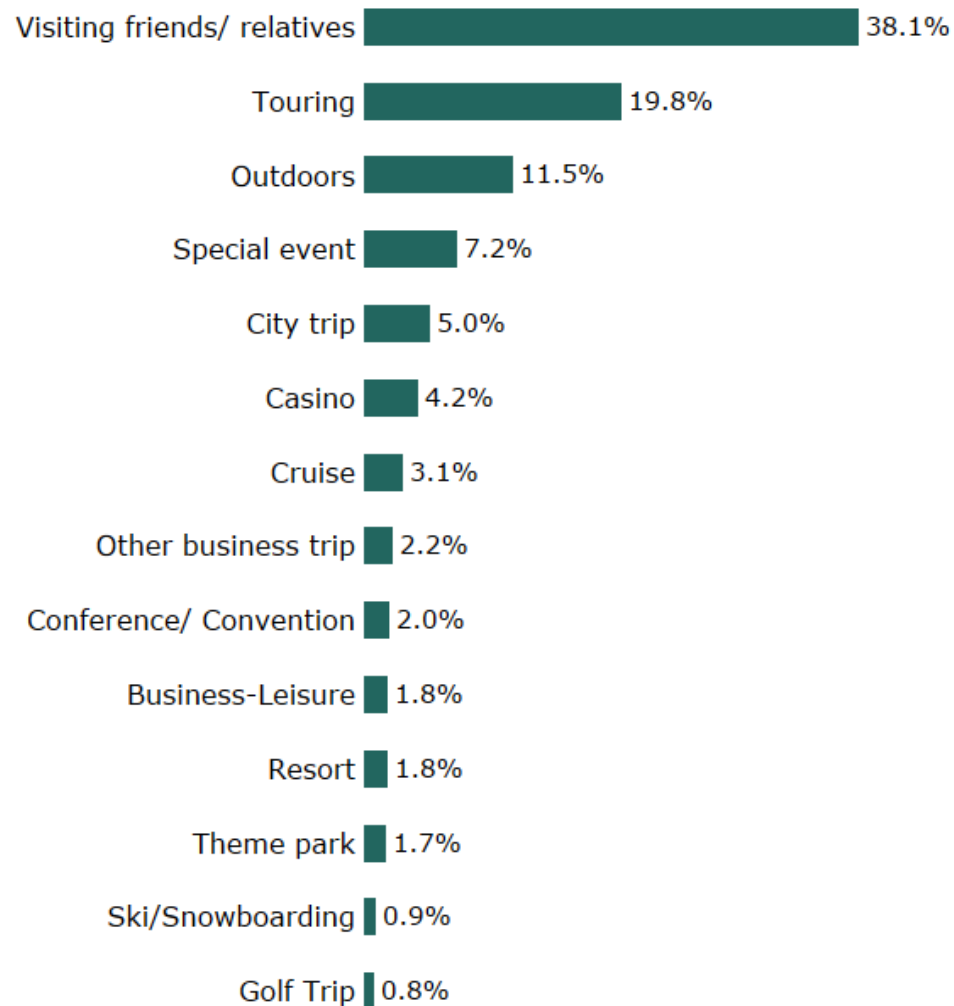


Source: Northern Arizona University's Economic Policy Institute, Arizona Department of Revenue

Visitor Summary

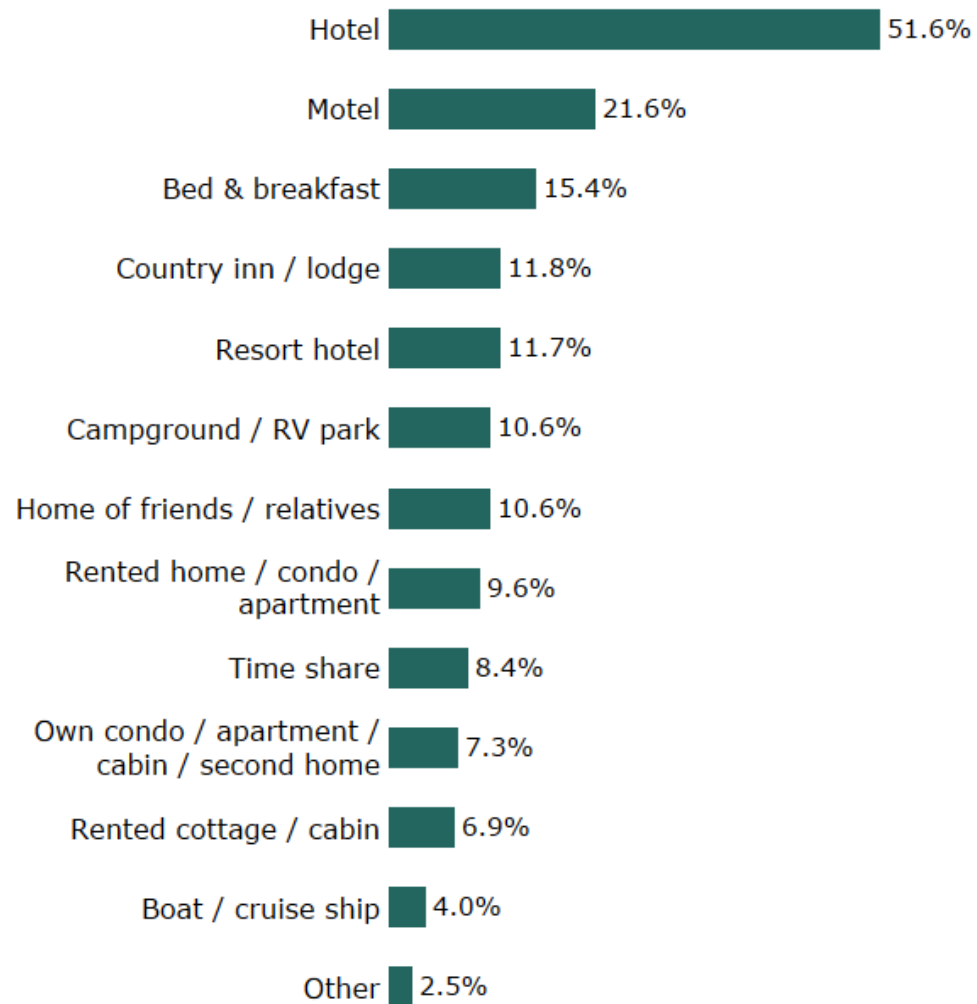


2024 Main Purpose of Trip: West Coast Region



Source: Longwoods

2024 Accommodation: West Coast Region



Source: Longwoods

2024 Visitor Summary: La Paz County



80.7%
Overnight Visitor Share

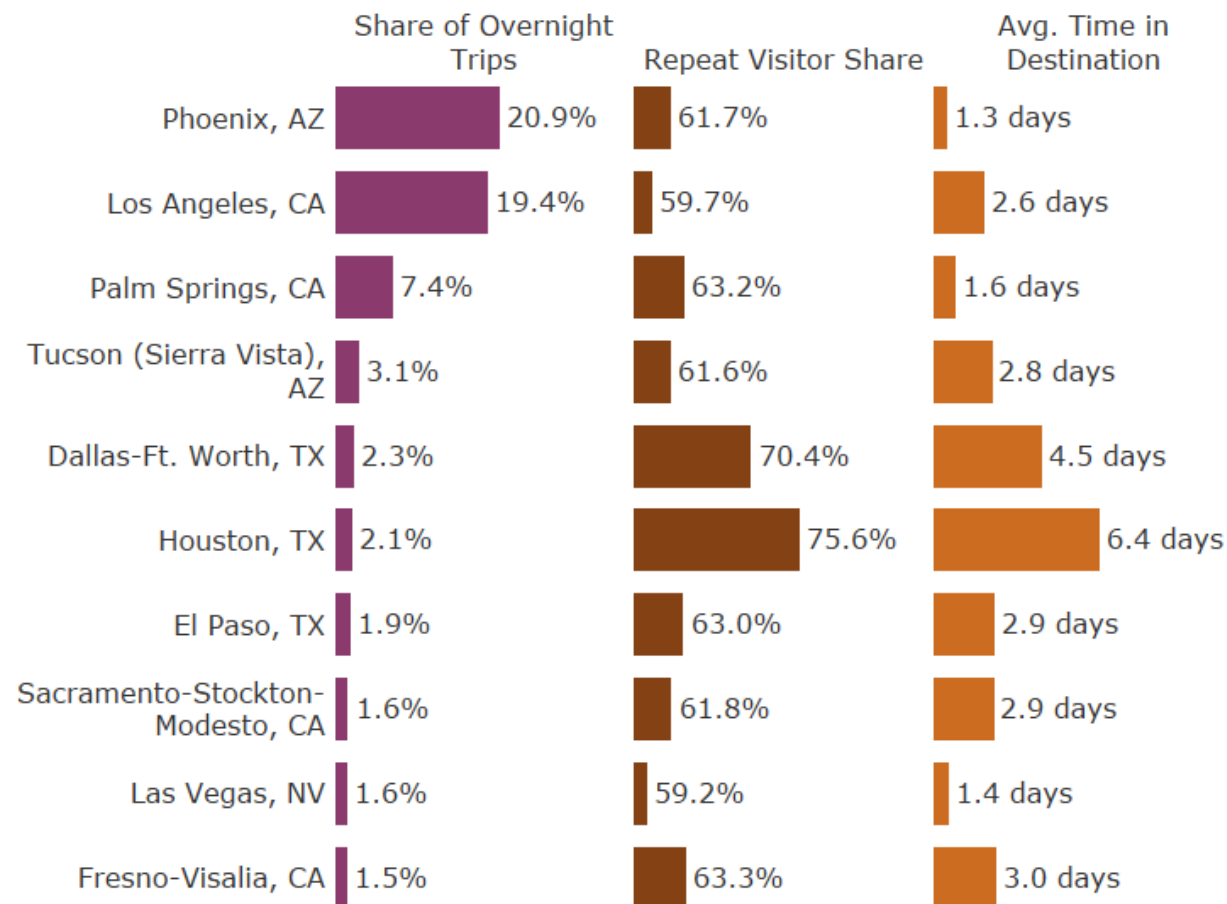


63.5%
Repeat Visitor Share



2.7 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

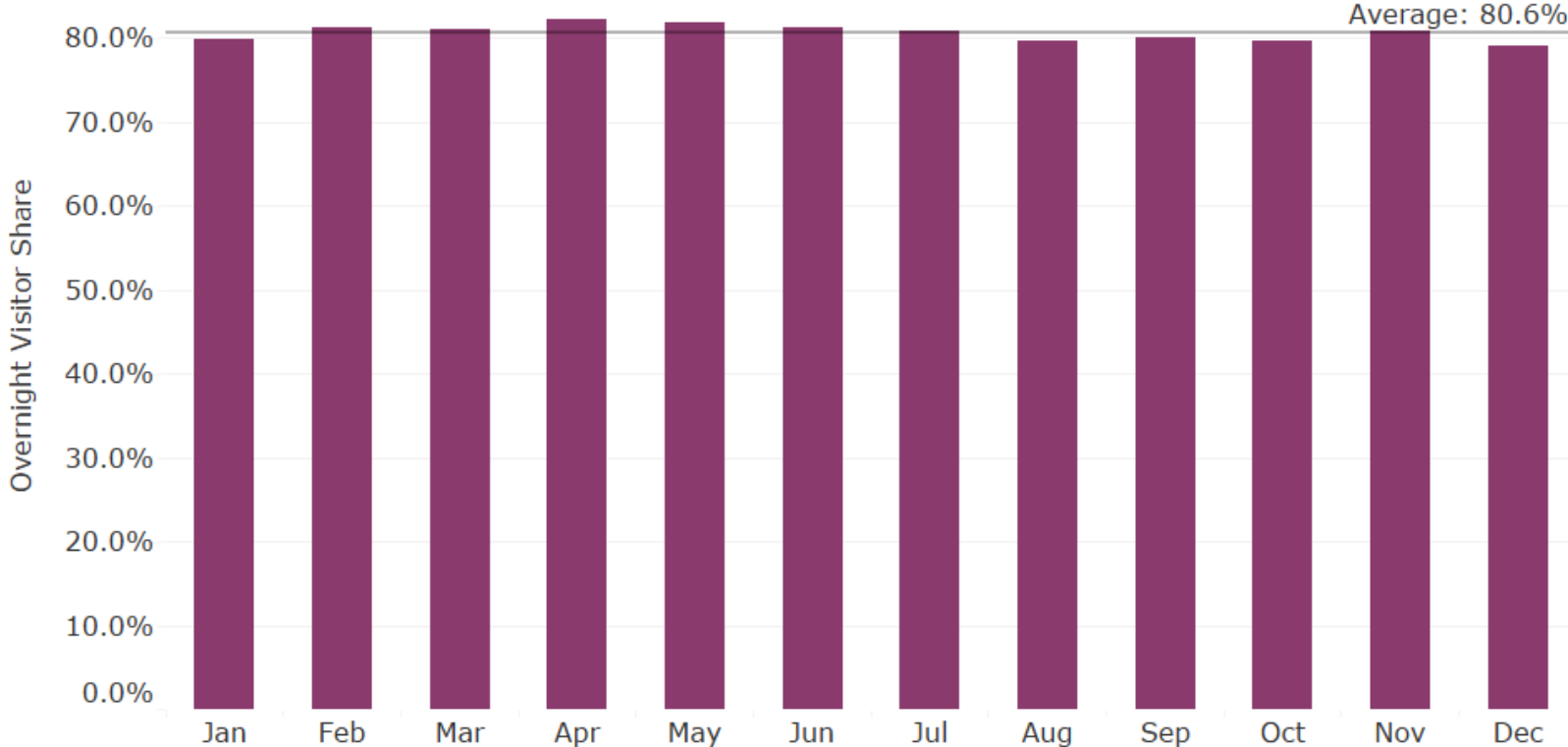


Source: Azira

Overnight Visitor Share: La Paz County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Mohave County



81.2%
Overnight Visitor Share

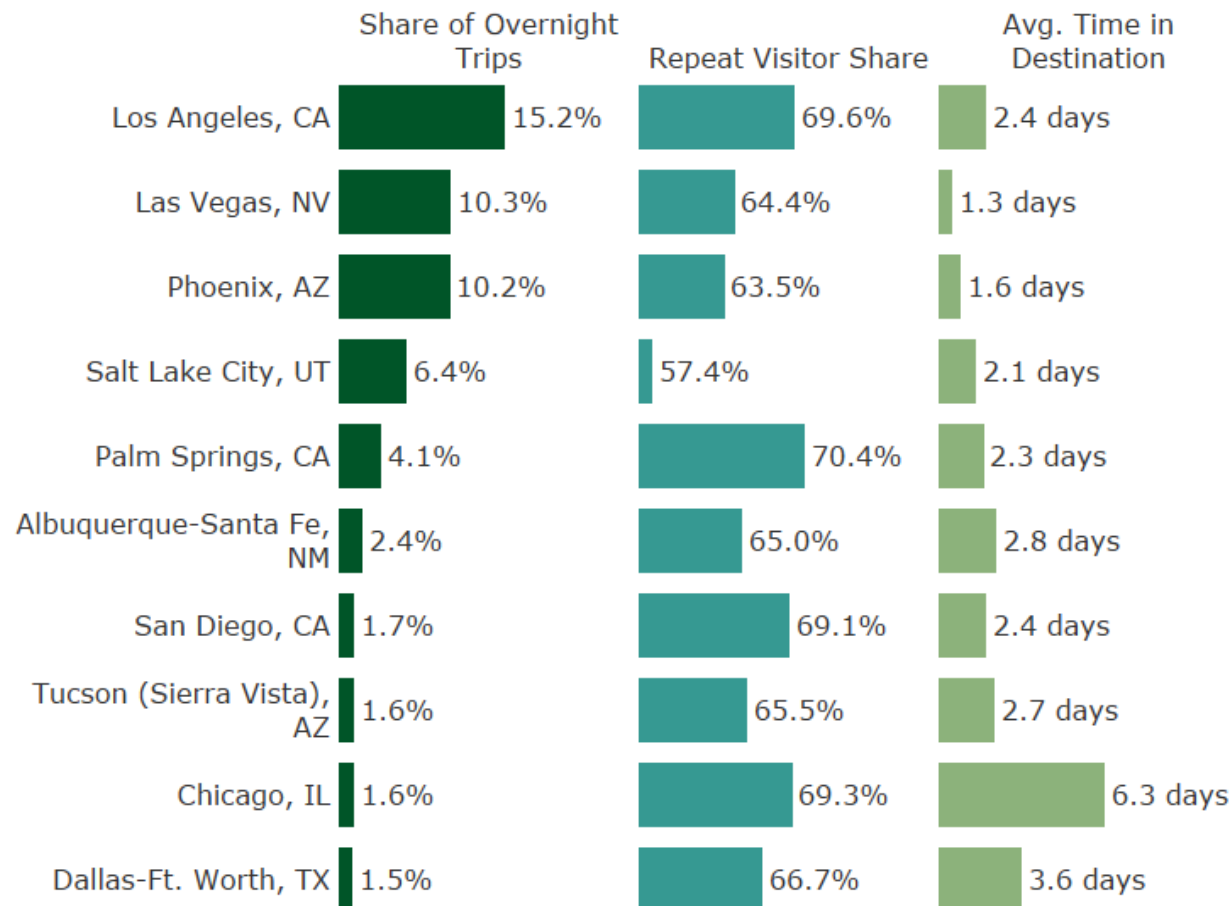


64.4%
Repeat Visitor Share



2.9 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

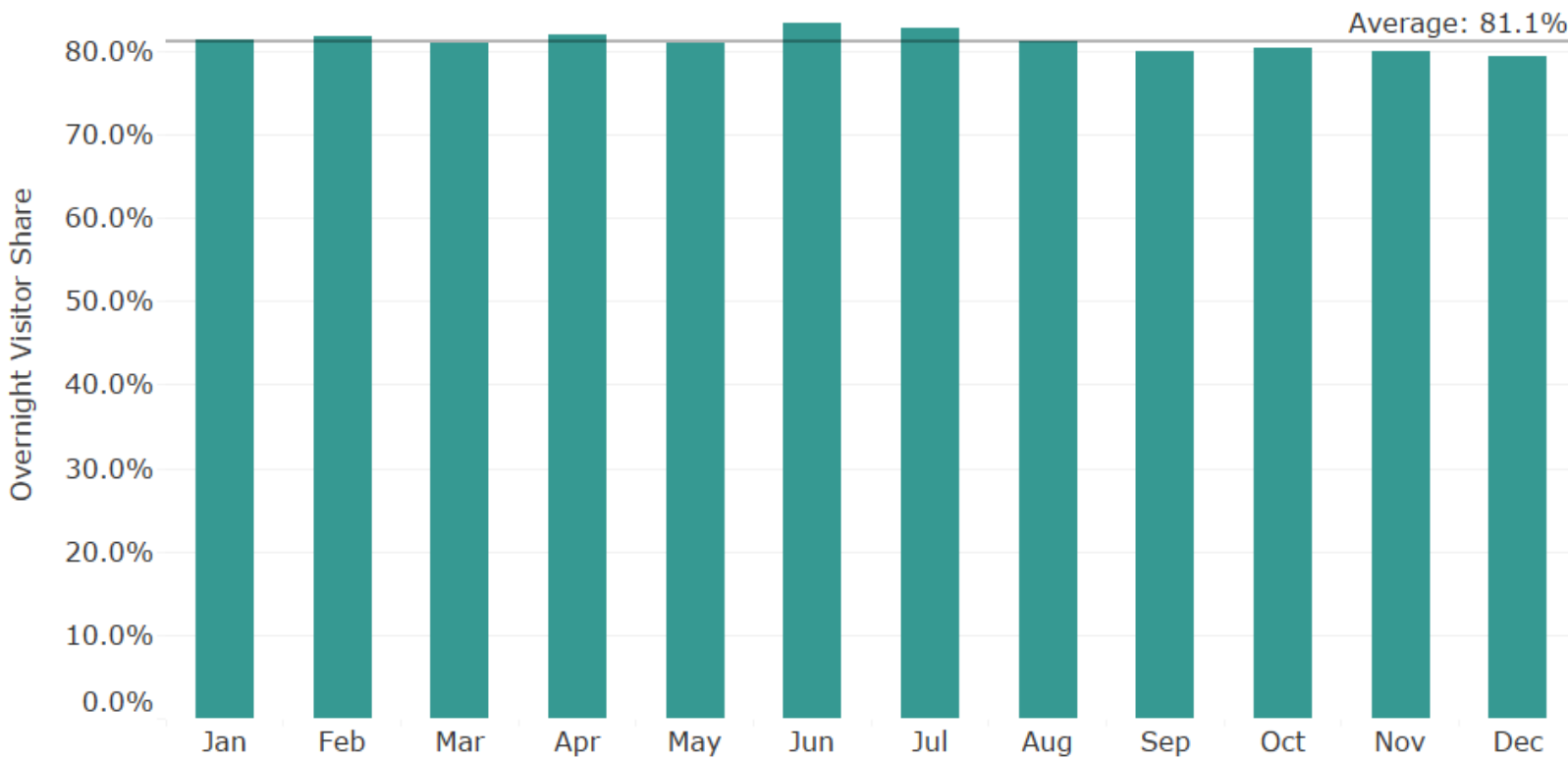


Source: Azira

Overnight Visitor Share: Mohave County



2024 Overnight Visitor Share Monthly Trend



Source: Azira

2024 Visitor Summary: Yuma County



81.4%
Overnight Visitor Share

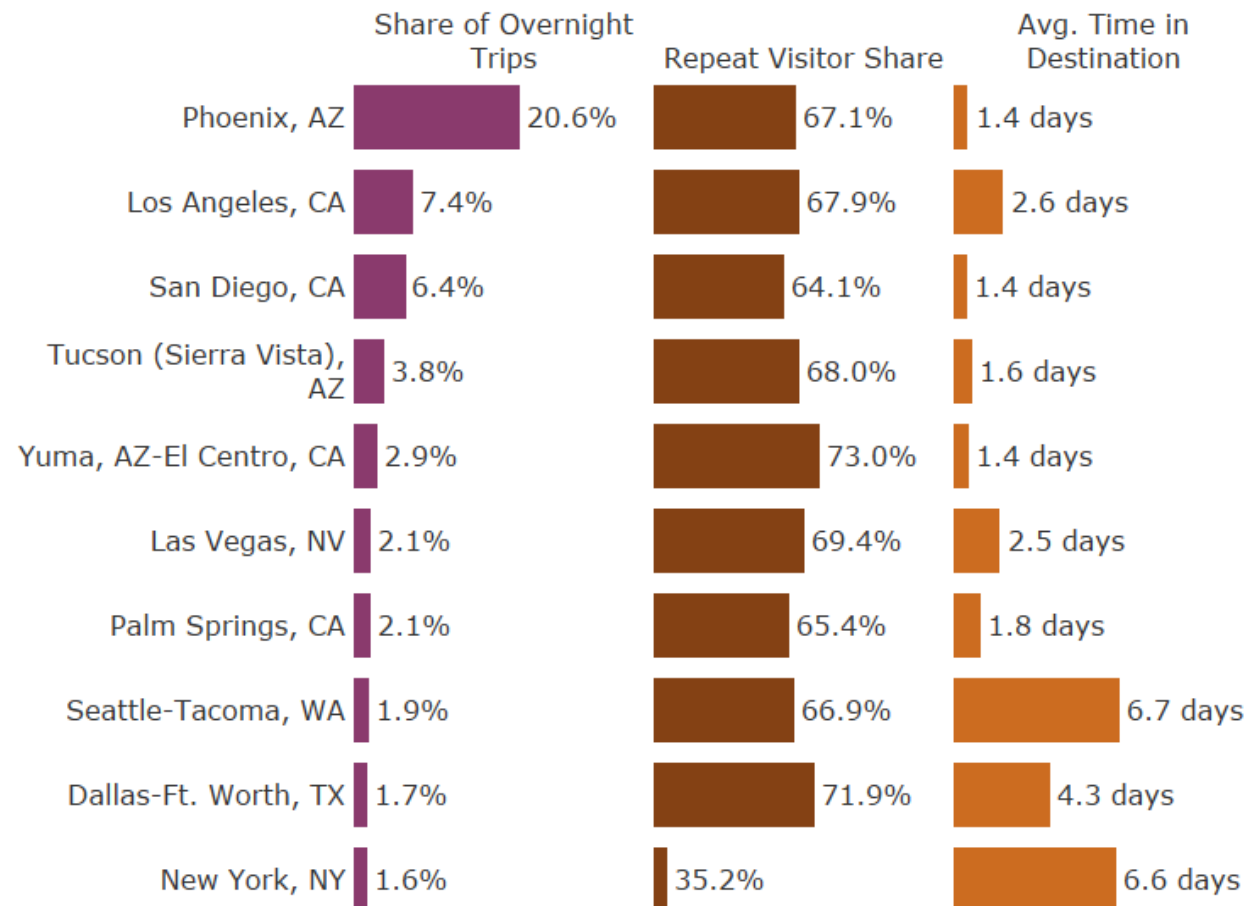


64.9%
Repeat Visitor Share



3.0 days
Avg. Time in Destination

Top 10 Overnight Visitor Origins

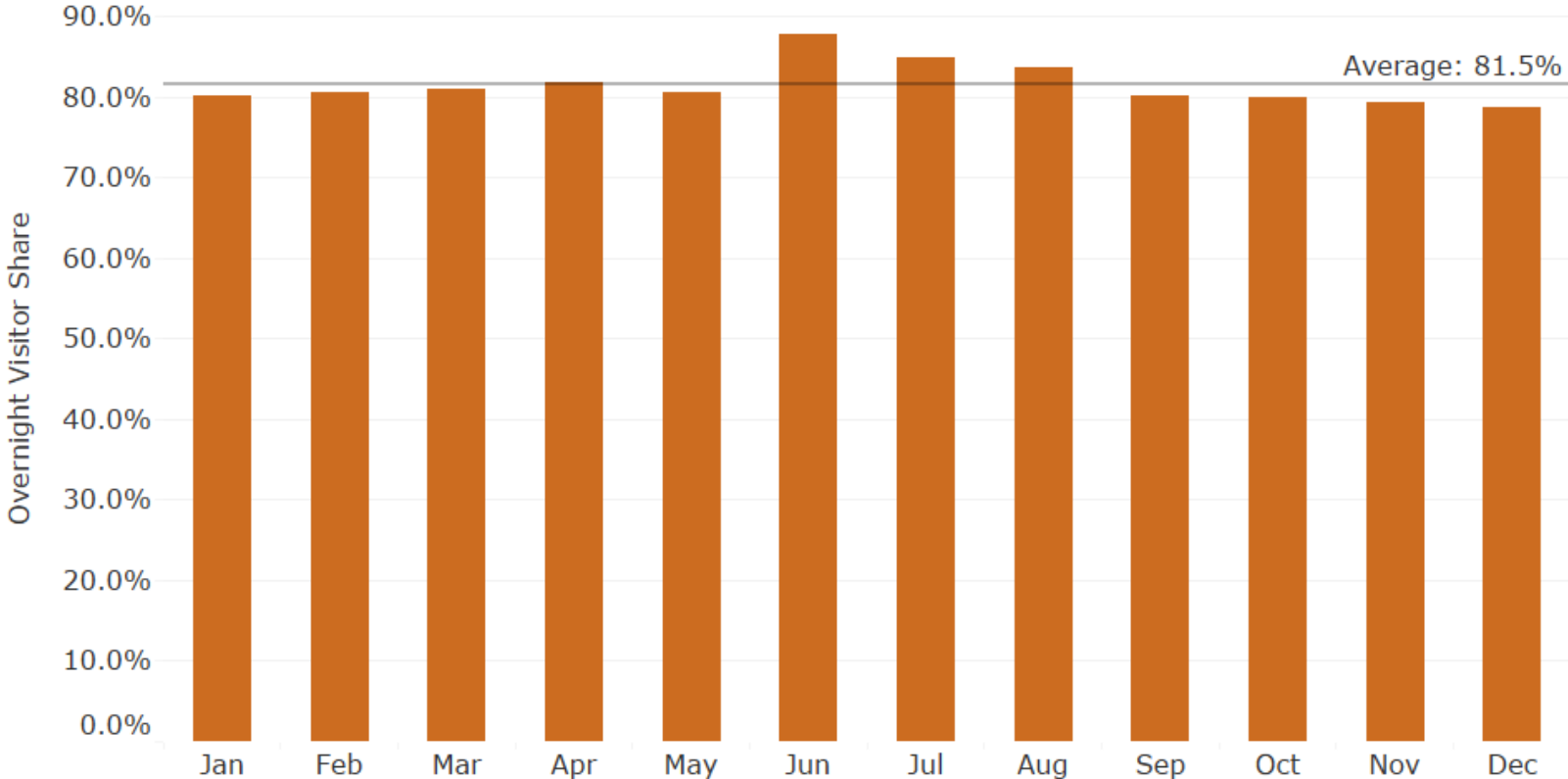


Source: Azira

Overnight Visitor Share: Yuma County



2024 Overnight Visitor Share Monthly Trend



Source: Azira