



MEMORANDUM

Date: July 20, 2022

To: The Honorable Chair and Members
Pima County Board of Supervisors

From: Jan Lesher 
County Administrator

Re: **Arizona Office of Tourism 2021 Tourism Numbers Release**

The Arizona Office of Tourism has released the first reported 2021 tourism numbers and their Economy Impact Data throughout the state. The numbers show recovery is well on its way but still below prior 2019 record levels. Arizona's status as a top-choice travel destination showed both visitor spending and overnight stays outpaced the national average, according to new research released last week.

2021 VISITATION & SPENDING RECOVERY		
Metric	Arizona*	U.S.**
2021 Total Overnight Visitation	40.9 million (87% of 2019)	2.04 billion (85% of 2019)
2021 Visitor Spending	\$23.6 billion (92% of 2019)	\$886 billion (76% of 2019)

Note: 2019 serves as an aspirational benchmark year, when tourism reached its all-time highest levels.
**Source: Arizona Office of Tourism (Dean Runyan Associates and Tourism Economics)*
***Source: U.S. Travel Association*

County by County recovery numbers show Pima County at \$2,786 billion in direct travel spending, which is a 73.2% change from 2020-2021 but still 12.6% below record highs of 2019. State & local taxes generated by Tourism in Pima County were recorded at \$193.8 million.

As expected, all Arizona tourism metrics are up year-over-year comparing 2021 to 2020, driven primarily by the recovery of leisure travel. The industry has yet to fully recover to the banner year of 2019, which highlights ongoing areas of needed focus, including building back conventions and meetings business, sporting events and international visitation.

ARIZONA VISITATION DATA AT-A-GLANCE			
METRIC	2021	2020	2019
Total Overnight Visitation	40.9 million	32.1 million	46.8 million
Visitor Spending	\$23.6 billion	\$14.9 billion	\$25.6 billion
Jobs	167,200	156,700	194,300
Tax Revenue	\$3.4 billion	\$2.7 billion	\$3.7 billion
Earnings	\$6.9 billion	\$6.3 billion	\$7.7 billion
<i>Data Notes: 2019 was an all-time record year for Arizona tourism. 2020 was an abnormal year, with visitation heavily impacted by the pandemic.</i>			

International overnight visitation remained heavily impacted by the pandemic and although Arizona welcomed an estimated 3 million international visitors last year, which is up 101% over 2020, those numbers are still down 51% from 2019. Visitation from overseas travelers specifically is still down 81%, further underscoring the need to rebuild this sector.

Pima County’s continued focus on welcoming visitors from both Mexico and Canada should continue to improve our visitation numbers into 4th quarter and beyond. Also announced this summer was the entry of Flair Airlines, a low cost Canadian carrier who will begin direct twice-weekly nonstop service to Tucson in late November from Canadian cities Edmonton and Fort McMurray, Alberta, as well as weekly service to Lethbridge, Alberta; Prince George, British Columbia; and Windsor, Ontario.

Arizona’s natural assets and scenic beauty are motivators to visit our state and encompass many of the activities audience segments are most likely to visit here in Pima County. These groups of travelers include:

- Natural History Lovers: Looking for destinations with geographic, human or biological significances along with abundance of activities and unique experiences.
- Foodies without Pretense: The local food scene plays a large part in their leisure trips. Our UNESCO City of Gastronomy title along with abundance of local restaurants and offerings make Pima County a top destination for this group of travelers.
- Luxury Travelers: Looking for safety, comfort and ease of travel especially in a warm weather environment with a variety of activities.
- Wild Bunch: Like to engage in outdoor recreational opportunities with their families, which include hiking, biking, and outdoor sports. Ease and convenience are important to this group.
- Self-Care Seekers: Motivated to travel for relaxation, self-care and rejuvenation experiences. Spas, resorts, health, and physical performance are important to them when choosing a vacation destination.

The Honorable Chair and Members, Pima County Board of Supervisors
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As the tourism recovery progresses, Pima County will continue aggressive marketing both domestically and internationally along with our Destination Marketing Organization (Visit Tucson). We will remain focused on the unique beauty and variety of experiences to be found here in Pima County and Southern Arizona, along with emphasis on conventions, meeting planners, sporting events and business travel.

JKL/anc

c: Carmine DeBonis, Jr., Deputy County Administrator
Diane Frisch, Director, Attractions & Tourism