



Visit
tucson

VISIT TUCSON

2020-21 ANNUAL REPORT
2021-22 MARKETING PLAN



Tucson Mountain Park



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Dear Customers & Stakeholders,

When COVID-19 reared its ugly head in early 2020, few people anticipated its impacts would be so severe and last so long. In fiscal year 2020-21, pandemic-related declines in occupancy and average daily rate led to an 18% drop in revenue per available room. However, this reduction beat the national average decline of 23% and landed us among the best-performing cities in our competitive set of western U.S. destinations. Occupancy peaked at 65% in April 2021 and metro Tucson resorts saw year-over-year increases in average daily rate.

As we begin fiscal year 2021-22, we find ourselves in a better position than we were 12 months ago. Leisure travel has nearly recovered, and meetings and business travel are expected to strengthen in metro Tucson this fall and winter. Our sales staff is booking meetings and generating leads for future meetings, while the marketing team is launching campaigns to attract new and returning leisure visitors.

We don't expect the recovery to follow a linear trajectory due to the correlation between COVID-19 infection rates and travel interest. Recent history has shown that as infection rates increase (as they are in late summer 2021), travel interest declines. For this reason, setbacks are anticipated, and our Tourism Recovery Plan was extended for one more year. The 2021-22 plan features more than 100 tactics designed to restore the travel industry through collaboration with partners, clients, community organizations, and local and county governments. You can read more about it on pages 19-20.

As you read through this plan you will see key priorities outlined through individual tactics. These priorities include:

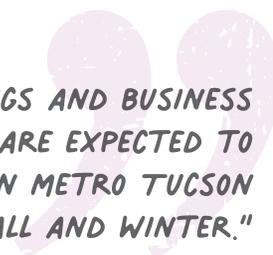
- Launch a new VisitTucson.org website in fall 2021 with compelling content, elegant design, and upgraded functionality.
- Prioritize face-to-face meetings with clients at more than 50 out-of-market tradeshows and sales missions.
- Connect with more than 400 meeting planners, sports rights' holders, journalists, tour operators, and travel agents at conferences and familiarization trips held in Tucson.
- Rebuild the Mexico market, collaborating with interested businesses on a robust advertising campaign designed to restore visitation and spending.
- Unveil a new partnership model that better connects businesses with their preferred benefits.

The last 18 months have been difficult, but metro Tucson is well positioned to recover. Every business in this community has been impacted by the global pandemic and I encourage you to contact me directly at 520-770-2149 or bderaad@visittucson.org if you need additional assistance or have ideas to share.

Best Regards,



Brent DeRaad
President & CEO



***"MEETINGS AND BUSINESS
TRAVEL ARE EXPECTED TO
STRENGTHEN IN METRO TUCSON
THIS FALL AND WINTER."***



2021-22

BOARD OF DIRECTORS

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University of Arizona

Vice Chair

Andrew Stegen, Complex Director
Westward Look Wyndham Grand Resort & Spa

Secretary

Otton Suarez, General Manager
El Conquistador Tucson, A Hilton Resort

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Glenn Grabski, General Manager
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Nancy Kluge, President & CEO
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Evan Feldhausen, Tax Shareholder
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Tucson Roadrunners

Dr. Amanda Kraus,
Assistant VP - Campus Life
University of Arizona

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Ares Collective Restaurants

Moniqua Lane, Owner
Downtown Clifton/Citizen Hotels

Hillary Louarti, Owner
Diamond Transportation

Chris Squires, Managing Partner
Ten55 Brewing Company

Laura True, Owner
White Stallion Ranch

Bryan Tubaugh, Chief Executive Officer
Aligned Hospitality Management

Government

Sharon Bronson, Chair
Pima County Board of Supervisors

Joe Winfield, Mayor
Oro Valley Town Council

Elaine Becherer, Mayor's Appointee
City of Tucson

Members at Large

David Hatfield, Senior Director of Air Service
Development and Marketing
Tucson Airport Authority

Amber Smith, President & CEO
Tucson Metro Chamber of Commerce

VISIT TUCSON'S
RETURN ON INVESTMENT (ROI)

\$21:\$1 ▶ Visit Tucson generates \$21 for the metro Tucson region for every \$1 invested in the organization

- *\$48,000,000 Leisure Visitor Inquiry Impact
- \$59,631,162 Meetings Economic Impact
- \$4,135,478 Sports Economic Impact
- +** \$30,500,168 Public Relations Earned Media
- \$6,456,950 Film Direct Spending
- \$344,798 Tourism Economic Impact

\$149,068,556 **2020-21**
TOTAL ECONOMIC IMPACT

VISIT TUCSON'S
 ECONOMIC IMPACT
 DECREASED 27%
 IN **2020-21**
 DUE TO COVID-19 IMPACTS

\$149,068,556
 ÷ \$7,200,000
 (2020-21 Budget)
\$20.70

*Visit Tucson's leisure visitor inquiry impact is measured as 3% of total visitor spending in Pima County in 2020

VISIT TUCSON

FUNDING OVERVIEW

Visit Tucson is a 501(c)(6) nonprofit organization that provides destination marketing services for Pima County, City of Tucson, and the Town of Oro Valley. Combined, these entities are expected to invest \$7.6 million in Visit Tucson in 2021-22, approximately 96% of the organization’s revenue.

Pima County, Tucson, and Oro Valley invest only bed-tax revenue in Visit Tucson. Bed (transient occupancy) tax is paid by people who stay for 30 days or less in hotels, resorts, bed and breakfasts and short-term lodging facilities. Visit Tucson does not receive general fund revenue from these government entities.

While the Town of Oro Valley contributes a set amount each year, Pima County and City of Tucson contribute a percentage of bed tax collections. City of Tucson revenue is based on previous year collections, while Pima County revenue is based on current collections. Due to the downturn in tourism in 2020, the City of Tucson will invest a flat amount of \$5 million in 2021-22. This amount exceeds the standard percentage of bed tax collections that would have been provided to Visit Tucson had the formula remained in place.

Private-sector revenue makes up \$277,450 in Visit Tucson’s 2021-22 fiscal year budget. Visit Tucson’s more than 500 partner businesses pay annual membership dues, and many invest in advertising on our website, in our publications, and through our other owned assets.

Visit Tucson plans to spend \$9.8 million in 2021-22, which is \$1.9 million more than its estimated revenue. Visit Tucson will spend down its cash to implement programming designed to expedite the region’s travel recovery.

FUNDING SOURCES

| | |
|--------------------|---------------------------------|
| \$5,000,000 | City of Tucson |
| \$2,200,000 | Pima County |
| \$410,000 | Town of Oro Valley |
| \$277,450 | Private |
| <hr/> | |
| \$7,887,450 | Budgeted 2021-22 Revenue |



Downtown Tucson

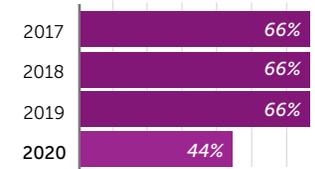
U.S. TOURISM OVERVIEW

U.S. Tourism Industry Loses Billions

According to Tourism Economics, the U.S. travel and tourism industry suffered \$645 billion in cumulative losses due to the impacts of COVID-19 through May 2021. This represents a loss of \$79 billion in federal, state, and local tax revenue. While the recovery is underway, different segments of the industry are recovering at different rates as reported by the U.S. Travel Association. Domestic leisure travel spending has almost fully recovered with 2022 spending predicted to reach 99% of 2019 spending levels and 2023 spending to reach 102% of 2019 spending levels. Domestic business travel spending lags the recovery with 2022 spending levels predicted to reach 71% of 2019 spending levels before fully recovering in 2024. International inbound travel is forecast to be the last segment to recover, with spending levels from this market not expected to exceed 2019 spending levels until the end of 2024.

The Future of Hybrid Meetings

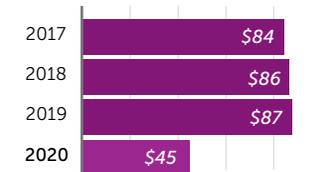
With virtual meetings replacing in-person meetings for much of the global pandemic, meeting planners are determining what role hybrid meetings will have going forward. While most agree that networking and collaboration are an important byproduct of face-to-face meetings, there continues to be some reluctance to travel. Destination Analysts, a research firm focused on the tourism industry, reported that the percentage of American travelers surveyed who indicated they would avoid conferences and conventions reached a pandemic low in May 2021, although this still represented more than half of the respondents (51.7%). This reluctance likely explains why “62% of event planners said their events will be a hybrid moving forward” in an informal survey conducted in April 2021 and reported in *Smart Meetings*, May 21, 2021.



U.S. Hotel Occupancy



U.S. Hotel Average Daily Rate



U.S. Hotel RevPAR

Source: STR, December 2017-20 reports

The Return of the Roadtrip

The “Great American Road Trip” never disappeared, but with widespread availability of low-cost flights and inspirational marketing from destinations around the world, travelers have had many options on where and how to spend their vacation dollars. Much of that changed with the global pandemic as countries closed their borders, flight schedules were dramatically reduced, and social-distancing guidelines were mandated. Travel became complicated and, for many, the safest option became a road trip taken in your personal vehicle with overnights spent in a vacation rental home with members of your “pod”. Despite easing restrictions, resumption of flights and access to vaccines, the popularity of the road trip continues. Over Memorial Day weekend 2021 the tourism research firm, Arrivalist predicted there would be 38.5 million road trips, an increase of 46% over 2020 and an increase of 2.4% over 2019. Furthermore, the fastest growing segment of road trips is for trips longer than 250 miles, indicating that many travelers are still relying on cars rather than planes. (*“Hot Beach Summer is Coming”*, Vox.com, May 27, 2021).



**"THE FASTEST GROWING SEGMENT
OF ROAD TRIPS IS FOR TRIPS
LONGER THAN 250 MILES."**

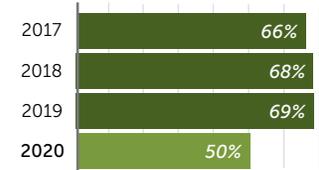
ARIZONA TOURISM OVERVIEW

Arizona Visitation and Spending Down in 2020

In 2020, Arizona welcomed 32.1 million visitors (-31.4%) who spent \$15 billion (-41.4%), highlighting the devastating impacts of COVID-19 on the travel industry. As a result, 160,500 jobs (-17.4%) were generated statewide, representing earnings of \$6.7 billion (-12.9%), and contributing \$718 million in state taxes (-31.7%). While it can be difficult to evaluate these numbers out of context, it's worth noting the travel industry is the largest export-oriented industry in Arizona (ahead of micro-electronics and aerospace) and contributed 6.2% of all state and local taxes collected in Arizona in fiscal year 2019-20. (Based on research by Dean-Runyan Associates, Longwoods International and Tourism Economics.)

Governor Ducey Launches Visit Arizona Initiative

The Visit Arizona Initiative will allocate \$101.5 million in federal American Rescue Plan funding to bolster tourism, employment, and economic recovery throughout the state. More than \$60 million is earmarked for grants, including \$25 million to support media productions, conferences, expositions, festivals, rodeos, and other events. Another \$20 million will be allocated to grants for destination marketing organizations (DMOs) around the state to conduct targeted consumer marketing campaigns. An additional \$16 million in grant funding will be provided to support the revitalization of outdoor recreation including trails, golf courses, and outdoor attractions. The initiative also provides funding for Arizona State Parks & Trails for parks improvements; for Arizona State Fair marketing; to the Arizona Lodging & Tourism Association for workforce development; to Local First for rural destination enhancement; and to the Arizona Office of Tourism for leisure marketing and to support domestic and international flights by marketing in cities with nonstop routes to Arizona airports.



Arizona Hotel Occupancy



Arizona Hotel Average Daily Rate



Arizona Hotel RevPAR

Source: STR, December 2017-20 reports

Arizona Hotels Surpass National Hotels In Key Metrics

In 2020, Arizona hotels reported a 12% decrease in average daily rate (ADR) to \$108.74, and a 27% decrease in occupancy. Combined, these metrics led to a 36% decline in revenue per available room (RevPAR), compared to a 48% decline in RevPAR in the U.S. From 2010-2019, the nation's hotels experienced the longest growth cycle on record, yet the global pandemic wiped out the increases gained in occupancy and RevPAR in only one year. Gains to ADR also suffered, but not to the same extent as the other two metrics. *(STR Reports 2010-2020)*

The Importance Of Local And Regional Travel

In-state and regional travelers have always been important to the tourism industry in Arizona, but were especially vital in 2020. The Arizona Office of Tourism reported the state welcomed 32.1 million visitors that year with 56% traveling from three states including 9.1 million visitors from Arizona, 6.8 million from California and 2.1 million from Texas. Unfortunately, regional visitation is in stark contrast to international visitation, which declined 68%, while the smaller segment of overseas visitation declined 84%, according to Tourism Economics.



**"THE VISIT ARIZONA INITIATIVE
WILL ALLOCATE \$101.5 MILLION...
TO BOLSTER TOURISM."**

TUCSON TOURISM OVERVIEW

Pima County 2020 Travel Impacts

Direct Travel Spending = **\$1.35 billion** (-48.3%)
Travel Industry Earnings = **\$648 million** (-18.6%)
Travel-Related Jobs = **19,290** (-22.1%)
Local Tax Receipts = **\$48 million** (-40.3%)
State Tax Receipts = **\$83 million** (-40%)

Source: "Arizona Travel Impacts 2000-2020," Dean Runyan & Associates

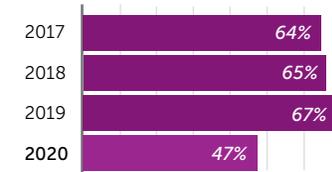
Because of visitor spending, each Pima County household had its tax burden reduced by **\$313** (-39.8%) in 2020

Source: "Arizona Travel Impacts 2000-2020," Dean Runyan & Associates

Tucson & Southern Arizona Region Visitation

5.8 million total 2020 **domestic overnight visitors to Tucson** and Southern Arizona region (-18.3%)

Source: "Tracking Domestic Visitor Volumes 2020," Longwoods International and Tourism Economics



Tucson Hotel Occupancy



Tucson Hotel Average Daily Rate



Tucson Hotel RevPAR

Source: STR, December 2017-20 reports

Tucson Hotels Outpace U.S. Hotels

Metro Tucson wrapped up 2020 with occupancy rates at 47%, average daily rate (ADR) at \$105 and revenue per available room (RevPAR) at \$49. While each of these metrics exceeded the national averages, these figures represent decreases of 30%, 9%, and 36%, respectively. When measured against our competitive set of 14 western/southwestern cities, we ranked 4th in occupancy, 9th in ADR and 7th in RevPAR. It's worth noting the subset of Tucson downtown properties had the smallest decline in occupancy, while Tucson resorts grew ADR by 4%.

Tucson International Airport Passenger Traffic Drops 34%

Tucson International Airport carried 1,847,898 passengers in fiscal year 2020-21 (July 1, 2020-June 30, 2021), a decrease of 34% when compared to fiscal year 2019-20. While monthly declines in the first eight months of the year averaged over 60%, things improved during the final four months. When comparing March, April, May, and June 2021 to the same months in 2019, the trend clearly shows passenger traffic levels more closely approaching the levels achieved two years ago (prior to the global pandemic) with each passing month.

In October 2020, Southwest Airlines added new non-stop service from Houston Hobby International Airport to Tucson, easily connecting travelers to the Southeast, the Caribbean and Latin America. In November 2021, Alaska Airlines will launch new non-stop service from Paine Field in Everett, WA to Tucson. This new service is in addition to Alaska Airlines' already existing service from Seattle, WA to Tucson, and is an indication of the growing demand into and out of the Pacific Northwest.

A Year For Non-Traditional Bookings

During 2020-21, Visit Tucson was able to assist community organizations, governmental groups, and hotel partners arrange accommodations for non-traditional individuals and groups that needed a place to stay in Tucson. With more than 1,000 firefighters fighting the massive, 120,000-acre Bighorn Fire in the Santa Catalina Mountains during the summer of 2020, there was a tremendous need for comfortable and convenient lodging. Some frontline COVID-19 workers, especially health care workers, wary of infecting family members, chose to stay in hotels where rigorous COVID-protocols could easily be implemented. With the global pandemic exacerbating the situation at the border, the U.S. government had to safely house asylum seekers. And reality TV productions looking to film in a safe, "bubble" environment found hotels willing to negotiate partial and total buyouts at their properties.



The Downtown Clifton Hotel Tucson

**"VISITORS TO PIMA COUNTY
SPENT \$1.35 BILLION IN 2020,
WHICH CONTRIBUTED \$48
MILLION IN LOCAL TAXES."**



EQUITY, DIVERSITY AND INCLUSION

Visit Tucson is committed to representing the diversity of our community in our sales, marketing, and promotional efforts, while also being more inclusive and welcoming to visitors of all abilities. In July 2020, a staff committee was created to begin discussing issues of equity, diversity, and inclusion (EDI). The goals of the committee were to collaboratively identify internal strategies to encourage equity, diversity, and inclusion; recommend more diverse organizations and individuals to partner with; and recommend actions Visit Tucson can take to be a more diverse and inclusive community partner. The committee of eight staff convened five times throughout 2020-21. The EDI outcomes are highlighted below along with our 2021-22 priorities.

Staff Trainings

A staff survey was conducted in August 2020 to gain a better understanding of how staff view Visit Tucson's efforts at fostering equity, diversity, and inclusion in the workplace. The survey confirmed that staff see value in participating in EDI trainings. In November 2020, we hosted two staff trainings led by Ashley La Russa, Roux Events, on 1) Courageous Conversations about Race; 2) Courageous Conversations about Identity, Power, and Privilege. A variety of online EDI trainings have been shared with staff to complete on their own, including LGBTQ+ Allyship, Anti-Asian Harassment, and others.

Cultural Celebrations

To better connect with the variety of cultures celebrated throughout metro Tucson, the EDI committee compiled a list of cultural celebration days and months to use in our sales, marketing, and promotional programs. For example, Sept. 15-Oct. 15 is Hispanic Heritage Month and Visit Tucson collaborated on a variety of Hispanic outreach and education programs with community partners. Cultural heritage months are being promoted via our social media and partner e-newsletters.

Accessibility

Through a partnership with the University of Arizona's Master of Public Administration program and Disability Resource Center, we are developing content for a new Accessible Tucson initiative to better connect visitors with limited mobility to metro Tucson's attractions and experiences that meet or surpass ADA guidelines. To improve our handicap accessible information on VisitTucson.org, we will create a landing page of resources, complemented by a new brochure. These tools and others will be shared with partners to help them increase the accessibility of their businesses, while helping promote the overall initiative, Accessible Tucson.

Priorities for 2021-22

For the first time, the 2021-22 Tourism Recovery Plan has a goal associated with EDI and 12 tactics to be implemented in the upcoming fiscal year. In addition to the Accessible Tucson initiative, we will also develop new community partnerships with BIPOC, LGBTQ+, and disability-focused organizations, businesses, and government departments. Video footage and photography representing metro Tucson's racial diversity and accessibility will be secured and used for all marketing and communications efforts. New itineraries that showcase the culture and history of Native Americans, Blacks, and Asian-Americans in metro Tucson will be created and promoted. Group sales will pursue BIPOC meeting and event professionals and the groups they represent, while Tucson Sports will partner with adaptive and LGBTQ+ sports organizers to host events in metro Tucson. Visit Tucson staff and board members will have an opportunity for ongoing education through EDI trainings.

VISIT TUCSON'S STATEMENT ON EQUITY, DIVERSITY, INCLUSION, AND ACCESSIBILITY

Metro Tucson is a culturally diverse community, blending Native American, Spanish, Mexican and Anglo cultures. We are a kind and welcoming community in which to live, work, and visit. It is this diversity and kindness that attracts people from across the globe.

As indicated in our vision statement to welcome the world, Visit Tucson welcomes people of all races and ethnicities, religious beliefs, and physical abilities. We commit to being more inclusive in our representation of the diversity of our community, while also being more inclusive and welcoming to visitors from all walks of life.

We acknowledge this culturally rich landscape is the ancestral homeland of Indigenous Peoples including the Hohokam, Tohono O'odham, Pascua Yaqui (Yoeme), and more who may call this place home. Visit Tucson respects the Indigenous communities who have stewarded this land throughout generations, and we recognize and acknowledge the people, culture, and traditions that make up the fabric of our community.

Visit Tucson condemns all forms of racism and commits to being inclusive in all aspects of our marketing and promotion to authentically represent our racially diverse community.

Tucson and Southern Arizona is a welcoming destination for visitors of all abilities. Through community partnerships, Visit Tucson aims to enhance promotion of the variety of accessible attractions, museums, venues, and outdoor experiences to discover.

We are proud of Tucson's 100% score on the Human Rights Campaign's Municipal Equality Index (MEI) and commit to working with government partners to maintain that score. The MEI examines how inclusive municipal laws, policies, and services are of LGBTQ+ people who live and work there.

Fostering inclusion, diversity, and equity among our staff, board of directors, and sales and marketing programs is a priority. We proactively seek opportunities through trainings and community partnerships to instill a stronger sense of inclusion and equity among our staff.

2020-21

TOURISM RECOVERY PLAN

Visit Tucson launched a 15-month Tourism Recovery Plan (April 2020 – June 2021) when the COVID-19 pandemic hit. The plan outlined a phased approach to relaunching efforts, with tactics designed to inspire travel when stay-at-home orders were enacted and to encourage travel as restrictions were lifted. Initially, sales and marketing campaigns were targeted locally and regionally, but expanded to include non-stop air markets as flights resumed. While there were tactics targeting international markets, ongoing border closures rendered those impractical to execute.

RECOVERY PLAN SUMMARY

3 Goals

13 Strategies

122 Tactics

TACTICS

97 Accomplished (79%)

18 Carried Over (15%)

7 Not Completed (6%)

Progress as of June 30, 2021

GOAL 1

Grow visitation to metro Tucson at levels commensurate with competitive cities once travel resumes.

1. Grow local visitation
2. Grow domestic visitation
3. Grow international visitation
4. Grow meetings business
5. Grow sports business
6. Grow film/television business

Metro Tucson was fourth in lodging occupancy out of the 15 large western/southwestern cities in its competitive set in 2020. After a difficult January due to a COVID-19 outbreak, metro Tucson rebounded with stronger occupancies during the first half of 2021 peaking at 65% in April.

Visit Tucson pushed out its “Wide Open Spaces” messaging in Arizona and southern California drive markets and in cities with non-stop flights to Tucson International Airport (TUS) throughout the worst of the pandemic. Our advertising, complemented by strong media relations and social media campaigns, attracted visitors seeking safe and scenic getaways.

Visit Tucson kept its sales team intact throughout the pandemic to rebook canceled meetings and book new business for metro Tucson hotels, resorts, and venues. Meetings activity is scheduled to pick up strongly in fall 2021 and continue through spring 2022. Our sales team continues to rebuild its meetings leads funnel, which will help us bring meetings business back to pre-pandemic levels by 2023.

GOALS

GOAL 2

Work with local and regional government and business partners to help our community recover from COVID-19's medical and fiscal impacts.

1. Partner to help area businesses impacted by COVID-19
2. Partner to house those impacted by COVID-19
3. Help tourism businesses impacted by COVID-19
4. Help industry workers impacted by COVID-19

Visit Tucson aided with the branding of the City of Tucson's "Somos Uno/We Are One" initiative, which invested millions of federal recovery dollars in local non-profits and participated in Pima County's "Back to Business" program that established COVID-19 safety guidelines to help area businesses reopen safely during the pandemic.

Visit Tucson collaborated with Sun Corridor Inc. to include tourism as one of the region's top economic recovery sectors coming out of COVID-19. Our 500 partner businesses received a six-month extension to their partnership agreements at no charge. Industry-specific campaigns were conducted including Sonoran Restaurant Week, VirtualTucson.org and Tucson Show of Support.

A list of metro Tucson hotels and resorts that were willing to house COVID-19 medical personnel and patients was developed and updated throughout the pandemic. Hotel stays were secured as needed.

GOAL 3

Reshape Visit Tucson's operation, as needed to maximize its 2020 impacts, while positioning metro Tucson's tourism industry and Visit Tucson for recovery in 2021-22.

1. Reduce payroll and programming, while executing core functions
2. Pursue new revenue sources
3. Limit event investments to programs that attract visitors

COVID-19 impacts forced Visit Tucson to reduce its staff and budget by 25% heading into the 2020-21 fiscal year. The pandemic's extended impacts forced the cancellation of many components of our 2020-21 program of work, but provided carry-over funds which will put us in a stronger financial position to accomplish our goals in 2021-22.

Securing Paycheck Protection Program loans in 2021, along with a federal Coronavirus Relief Funds grant via Pima County, allowed us to retain our remaining staff and market our region to potential visitors. The organization also researched and applied for grants, loans, and the federal Employee Retention Tax Credit to make it through the pandemic.

RECOVERY PLAN

ALIGNMENT WITH MASTER PLAN

In August 2018, Visit Tucson engaged Resonance Consultancy, a leader in place branding and an advisor to cities around the world, to assist us in developing a 10-Year Metro Tucson Tourism Master Plan. The recommendations of the plan are organized into six pillars of focus including well-being, placemaking, connectivity, culture, development/investment, and advocacy. Some of the recommendations of the plan can be taken on by Visit Tucson while others are best addressed by our partners, including local government, economic development organizations, educational institutions, and others.

More than 40 tactics implemented in the 2020-21 Tourism Recovery Plan aligned with the Metro Tucson Master Plan. Highlights follow.



Capital Of Well Being

Well-being was featured in the 2021 Tucson Official Travel Guide and was consistently incorporated into our marketing messages, including our “Wide Open Spaces” campaign.



Placemaking

Visit Tucson collaborated with Downtown Tucson Partnership and the City of Tucson to advance ongoing revitalization downtown by participating in community cleanup efforts, supporting the Pioneer Hotel Memorial initiative, and promoting the re-opening of downtown restaurants and activities.



Culture - City Of Gastronomy Activation

In partnership with Visit Tucson and Cox Media, the Tucson City of Gastronomy produced a new video to increase awareness about the UNESCO City of Gastronomy designation.



Economic & Workforce Development

Visit Tucson provided destination marketing expertise, photography, and video footage for use by Sun Corridor Inc. and Startup Tucson in their efforts to attract and retain workers. We participated in Sun Corridor's Pivot Playbook and supported Startup Tucson's Remote Tucson relocation program.



Sustainable Tourism

Visit Tucson partnered with the National Forest Foundation and Coronado National Forest on a fire recovery campaign, participated in the Coronado NF Sustainable Recreation Strategy, and worked with regional land managers on joint messaging promoting responsible recreation.

2021-22

TOURISM RECOVERY PLAN

Visit Tucson is executing a second, one-year tourism recovery plan from July 1, 2021-June 30, 2022, to continue to help rebuild the region's visitor industry as it emerges from the impacts of COVID-19.

With millions of Americans now vaccinated, leisure travel is experiencing strong growth and a return to pre-pandemic levels. Meanwhile meetings, corporate and business travel, sports tourism, and festivals and events are still months, and likely years, away from a full recovery. This year's Tourism Recovery Plan is a continuation of last year's plan, building on the results that have been achieved, while developing tactics to stimulate and support a full recovery across all market segments.

We've added a "quality of place" goal to this year's plan, which recognizes the need to fully reopen lodging, attractions, retail, and restaurants. We acknowledge that great places to live are great places to visit and endeavor to work with organizations throughout the community to focus on strategies that benefit residents as well as visitors. We are eager to collaborate to bring back festivals, events, and sports competitions safely, while helping reopen downtown and promoting the expanded Tucson Convention Center.

GOAL 1

Grow visitation to metro Tucson at levels commensurate with competitive cities as travel resumes and recovers.

1. Market and promote Tucson and Southern Arizona's outdoor experiences, restaurants, attractions, and staycations for residents and domestic visitors to enjoy.
2. Market and promote Tucson and Southern Arizona as a welcoming destination for Spanish-speaking visitors to shop, rejuvenate, and recreate and other international visitors to explore wide-open spaces.
3. Grow meetings room nights and meetings-related economic impact by aggressively selling metro Tucson as an ideal meetings destination to meeting planners throughout the nation, including Arizona associations and local companies.
4. Grow sports room nights and sports-related economic impact by re-booking events that bring in sports delegates from outside Pima County, along with new events that fill area sports facilities, local hotels, and resorts.
5. Promote Tucson and Southern Arizona as a safe bubble for film and television productions.

GOALS

GOAL 2

Work with the business community and local and regional government to help our community recover from COVID-19's impacts.

1. Develop and convey COVID-19-related safety communications to potential visitors and Visit Tucson partner businesses in collaboration with the business community and city, county, and state guidelines.
2. Collaborate with the Downtown Tucson Partnership, City of Tucson, Rio Nuevo, and downtown districts to advance ongoing revitalization downtown and support the reopening of downtown Tucson.
3. Work with local and regional economic development organizations and municipal/county economic development offices to enhance the region's business climate.
4. Support small businesses' unique needs to recover from the economic impacts of COVID-19 closures.
5. Help tourism-related businesses in Tucson and Southern Arizona remain open and rebuild attendance/occupancy capacity.

GOAL 3

Partner with local and regional government and community stakeholders to enhance the region's visitor experience and quality of place, positioning metro Tucson as both an outdoor mecca and cultural destination.

1. Promote and market community projects that reinforce metro Tucson's position as an outdoor mecca and cultural destination, including attractions and arts organizations.
2. Partner with local, state, and federal land managers and private stakeholders to develop or enhance outdoor experiences for residents and visitors.
3. Sponsor events that attract visitors, fill lodging room nights, and provide national exposure for Tucson. Collaborate to explore the development of a signature event.

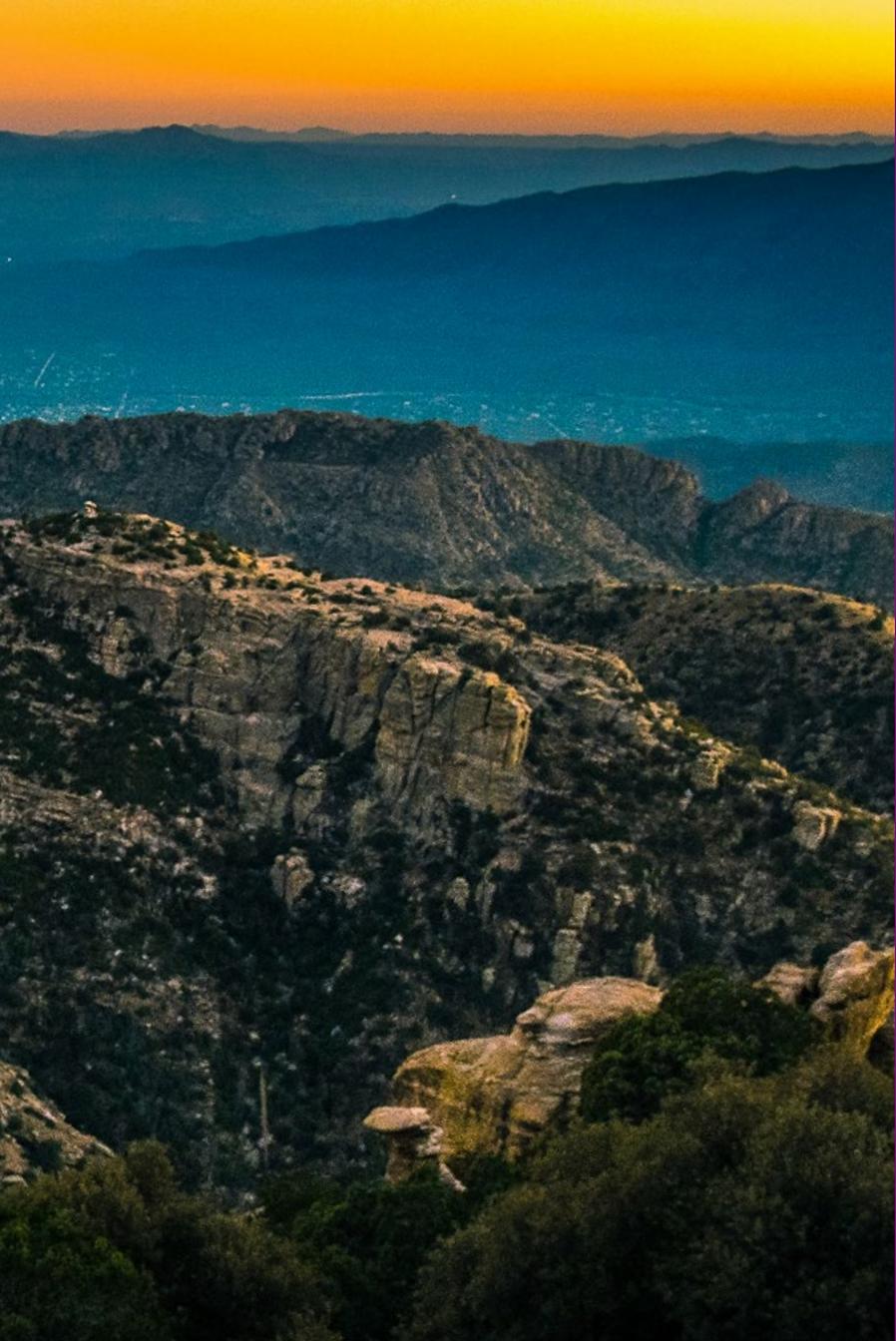
GOAL 4

Reshape Visit Tucson's operations, as needed, to maximize its 2021-22 impacts.

1. Secure \$8 million or more in 2021-22 revenue via public and private-sector investment and from available COVID-19 recovery sources.
2. Implement new efforts to promote diversity, inclusion, equity, and accessibility among Visit Tucson's staff and board, in the organization's sales and marketing programs, and through community partnerships.
3. Bring back Visit Tucson staff positions needed to function effectively coming out of the pandemic with a focus on department cross-training and collaboration.



Catalina Highway



VISIT TUCSON'S
DEPARTMENTS

MARKETING

PR & COMMUNICATIONS

SALES & SERVICES

TUCSON SPORTS

MEXICO MARKETING

TOURISM

FILM TUCSON

PARTNERSHIP &
VISITOR SERVICES



Gates Pass

MARKETING

The marketing department’s primary goal is to engage leisure, business, and international travelers with the “Free Yourself” brand and inspire them to experience everything Tucson and Southern Arizona have to offer. Through research and analysis, potential visitors from key markets are identified and targeted with relevant content and branded advertising deployed seasonally through a variety of media channels.

Visit Tucson’s media budget is relatively small when compared to many destinations in our competitive set. Keeping this competition in mind, along with the need to adjust with changing consumer habits, a paid media strategy that focuses primarily on digital platforms has been adopted to more accurately target specific audiences and better evaluate campaign return on investment (ROI).

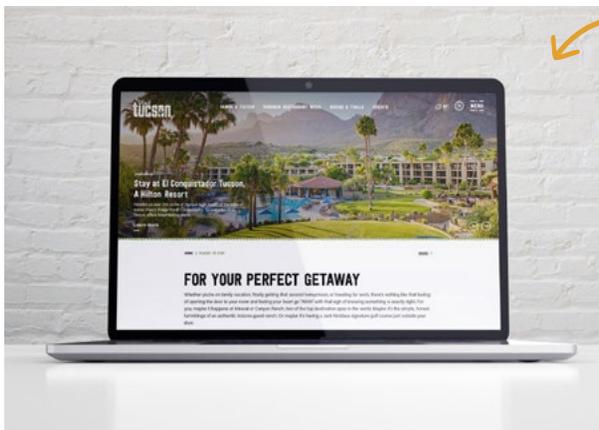
2020-21 KEY PERFORMANCE INDICATORS

816,992
Unique Website
Users

4,978,902
Social Media
Engagements

Highlights 2020-21

- Using Coronavirus Relief Funds provided by Pima County, **a robust media plan targeting leisure visitors, meeting planners, and sport event organizers was implemented.** Due to the nature of relief funding, the plans were successfully developed and executed over a relatively quick three-month period.
- For much of the fiscal year, people were unwilling or unable to travel, yet **website traffic was nearly restored through an aggressive paid search campaign,** targeting those individuals specifically interested in travel to Tucson and competing cities in the Southwest. While still down slightly, web traffic has steadily grown and is poised to surpass pre-COVID levels in the first half of fiscal year 2021-22.
- Based on traveler sentiment research, the “Wide Open Spaces” campaign was developed, focusing on the promotion of outdoor activities, attractions, and other experiences that travelers said they were looking for during the pandemic. In 2020-21, **60,787 pageviews to the campaign landing page were tracked and \$2.4M* of confirmed booking revenue was generated** by users who were exposed to our ads across various online booking platforms. *(*Source: Expedia Media Group)*



Priorities 2021-22

- With the goal of continuing to grow website traffic and engagement, **a dynamic new website with comprehensive changes to navigation, design, and content will be launched.** This site will be built and optimized to maximize the user experience, while showcasing partner businesses.
- To reflect the diversity of the visitors we target and attract, **new video and image assets will be captured and developed** showcasing diversity of race, ethnicity, age, lifestyle, religious beliefs, and physical abilities.
- With major changes to the travel landscape and our destination assets, **new collateral and creative will be updated** and developed to provide up-to-date information and to continue inspiring travelers to explore all that our region has to offer.
- As more and more travelers are vaccinated, **resume promoting the full breadth of our brand pillars to all top markets.** In addition to outdoor adventure and wellness, other brand pillars will be promoted through our owned media and paid media campaigns including heritage and culture, gastronomy, and the arts.

TUCSON TOP 10 MARKETS FOR VISITOR SPENDING

- | | |
|---------------------------|--------------------------|
| 1. New York | 6. Denver * |
| 2. Los Angeles * | 7. Washington, DC |
| 3. San Francisco * | 8. Seattle * |
| 4. Chicago * | 9. Atlanta * |
| 5. Phoenix * | 10. Dallas * |

Source: 2016 Visitor Analysis

*Denotes nonstop flight market

AN EVOLVING STRATEGY

As reactions to COVID-19 and the global pandemic changed, so did Visit Tucson's marketing strategy. Initially, most of our paid advertising efforts were paused to focus only on individuals who were actively searching for travel to Tucson and Arizona. **As travel restrictions eased, and demand began to grow, our efforts expanded accordingly.** Typically, during the summer, we target leisure travelers from the region, who can easily drive to Tucson. While this was the case during summer 2020, staycations were also marketed to Tucsonans eager to escape their homes and enjoy time with loved ones in a safe environment. Additionally, southern Californians were targeted after tracking growing interest and demand from travelers in this region who were experiencing tighter COVID-related restrictions.

Throughout the year we noted the propensity to travel was closely tied to the number of COVID-19 infections being reported. As infections ebbed and flowed, so did our efforts. When increases in web traffic and occupancy were measured in February 2021, **our target markets were further expanded to include cities with non-stop air service.** We continue to monitor the situation carefully, using a variety of research and tracking tools to most effectively target leisure travelers during these tumultuous times.



Cafe Santa Rosa

PR & COMMUNICATIONS

Public relations and communications generate coverage of metro Tucson and Southern Arizona in local, national, and international publications. The PR team pitches story ideas to journalists and influencers, hosts press trips, and conducts media missions in key cities. The department manages production of the Tucson Official Travel Guide and the Visit Tucson e-newsletter and generates content for VisitTucson.org, social media posts and ad placements as part of an integrated marketing/communications team.

2020-21 KEY PERFORMANCE INDICATORS

259

Articles

\$30.5M

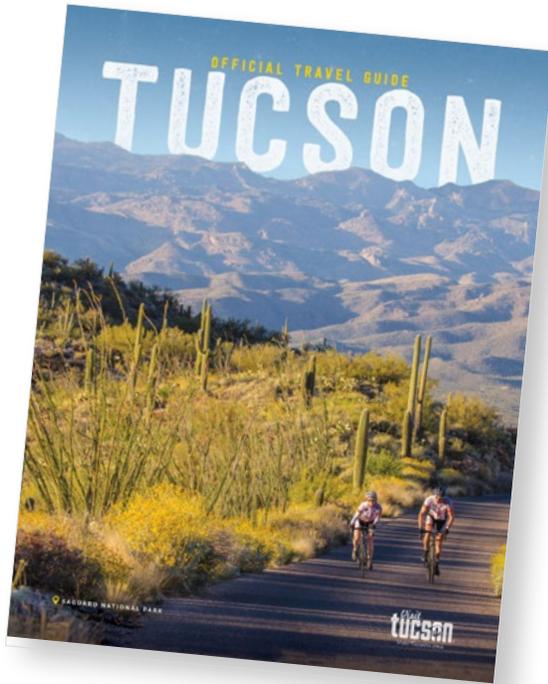
Value of Media Coverage

6.2B

Impressions

Highlights *2020-21*

- To stay connected with top travel, food, and lifestyle journalists, a series of four Zoom webinars featuring local partners were conducted in September 2020. **These webinars were the genesis of ten articles valued at more than \$2.3 million**, in publications such as *Conde Nast Traveler*, *Travel + Leisure*, *Oprah*, *Esquire*, and others.
- To drive community support of local businesses during the pandemic, we **partnered with ten attractions on a membership drive aptly titled “Tucson Show of Support”**, August 31 - September 6, 2020. This campaign was promoted on VisitTucson.org, via our social media channels, and through a local PR effort driving 45,000 impressions and generating \$130,000 in media coverage.
- For the first time, the **2021 Official Travel Guide was published in-house**, using communications and marketing staff to handle advertising sales, create and design the guide, and oversee content development.



Priorities 2021-22

- Consumer coverage in 2020-21 drove demand from travelers and journalists alike. Next fiscal year, we will leverage that demand, **converting it into presstrips and, ultimately, feature coverage.**
- Produce the 2022 Tucson Official Travel Guide in-house for the second year, ensuring it breaks even **with advertising revenue covering all hard costs** associated with publishing the guide.
- Given the recent algorithm change at Facebook (May 2021), identify and post the most compelling content **with the goal of generating four million engagements across all platforms.**
- Travel Classics West is one of the premiere conferences connecting editors and journalists with destination sponsors and will be held in Scottsdale, Arizona in November 2021. To showcase everything Tucson has to offer, **pre and/or post-press trip itineraries will be coordinated for Travel Classics West attendees.**

TUCSON LANDS ON CONDE NAST TRAVELER'S 2021 HOT LIST

Despite a global pandemic that led to **travel restrictions, reduced budgets, and the scaling back of destination coverage in major travel publications**, the Visit Tucson PR team generated a remarkable 259 articles valued at \$30.5 million in 2020-21. With in-depth feature articles largely absent from the media landscape, lists dominated the coverage and Tucson was featured in many; most importantly *Conde Nast Traveler's* 2021 Hot List. This was the first-time destinations were included in the Hot List and Tucson was in the elite company of Atlanta, the Caribbean, Chattanooga, Dubai, Kagoshima, Santa Barbara, Singapore, and Zurich.

Visit Tucson has a long history with *Conde Nast Traveler*, and it wasn't that long ago we found it difficult to schedule editorial meetings with them. Times have changed, and so has our relationship. The article accompanying the Hot List was written by Stephanie Wu, one of the last writers hosted before the pandemic. Wu **diligently updated her information through interviews and email**, including mentions of the UNESCO City of Gastronomy designation, Whiskey del Bac, Monsoon Chocolate, Barrio Charro, the Tuxon and Joshua Tree House Tucson in this reputable and well-read list.



JW Marriott Tucson Starr Pass Resort & Spa

SALES & SERVICES

Visit Tucson's convention sales department markets metro Tucson for national and international meetings and conventions. Sales works with meeting planners locally and in target cities to generate bookings for the city's hotels, resorts, and unique meeting venues and for Tucson Convention Center. After a booking is secured, the convention services department connects the planners with partner businesses and services. The convention services director represents Visit Tucson for the Tucson Gem, Mineral & Fossil Showcase and is the liaison for show owners, operators and vendors with the City of Tucson and Pima County.

2020-21 KEY PERFORMANCE INDICATORS

528

Leads

49

Meetings
Served

216

Meetings
Booked

\$59.6M

Economic Impact

121,119

Room Nights

Highlights *2020-21*

- Despite budget cuts and staff lay-offs, Visit Tucson **sales staff were retained to ensure Tucson and Pima County led the recovery in meetings and business travel**. We attended 18 virtual trade shows, 2 in-person trade shows, and completed 282 individual client presentations.
- COVID-related travel restrictions, social-distancing guidelines, and limits on the number of people who could gather in one place forced the cancellation of meetings. However, an astounding **50% booking rate was achieved for meetings cancelled** due to the pandemic.
- Coronavirus Relief Funds from Pima County were used for an **aggressive advertising campaign to maintain and increase Tucson brand awareness amongst domestic meeting planners**.
- When travel began to resume in spring 2021, Visit Tucson was at the forefront, inviting meeting planners to discover our destination first-hand. In the final three months of 2020-21, **35 planners with qualified RFPs were hosted, representing 46,000 potential room nights**, of which 8,600 room nights have already been confirmed.



Tucson Gem, Mineral, & Fossil Showcase

Priorities 2021-22

- Sales staff will continue to fill the meetings funnel by participating in an aggressive program of work featuring more than **45 out-of-market sales missions, tradeshows, and client events.**
- Host FAMs and site visits as a priority given the conversion rate is 80% when a client or prospective customer experiences our destination first-hand. In 2021-22, **Five inbound FAMs will be organized, delivering 180 meeting and event professionals** to Tucson.
- Through community collaboration, **facilitate the recovery and future growth of primary “City-Wide” events that drive compression** including the Gem, Mineral, & Fossil Showcase, Tucson Invitational Games, and the Christian Congregation of Jehovah’s Witnesses.

CARRY-ON, POSTPONE OR CANCEL?

The tourism industry was the industry hardest hit by the global pandemic and the meetings segment of the tourism industry suffered more than any other segment. **When pandemic protocols and restrictions were announced, meetings were forced to postpone or cancel.** Many meetings that initially postponed ended up being postponed for a second time (and sometimes a third and fourth time), while others ultimately cancelled. The impacts of the pandemic have lasted longer than most industry experts originally predicted, and no destination was immune from cancellations.

The Visit Tucson sales department worked diligently to rebook any meetings that had been canceled and **their 50% recovery rate is a testament to their success.** From March 2020 through June 2021, 283 groups and events were canceled representing 171,000 rooms and \$82.5 million in economic impact. As of June 30, 2021, 141 meetings and events have rebooked representing 80,000 rooms and \$35 million in economic impact. While the majority of these meetings will occur in fall 2021 and winter and spring 2022, there are a few rebooked meetings that will materialize as late as 2024.



Kino Sports Complex

TUCSON SPORTS

Visit Tucson Sports is charged with securing sporting events that require hotel rooms and fill venues throughout the metro Tucson area. Professional, amateur and youth sporting events at all levels (regional, national, and international) whose needs match the facilities in Pima County, City of Tucson, and Town of Oro Valley are pursued. Local sports organizers are given assistance to grow their existing events, while new events are targeted to fill need periods.

2020-21 KEY PERFORMANCE INDICATORS

27

Groups/
Events

7,676

Contracted
Room Nights

\$4.1M

Economic
Impact

Highlights *2020-21*

- In collaboration with FC Tucson and Pima County, **3,000 room nights were generated for MLS Preseason** despite spectators being limited to 20% capacity.
- With a focus on Equity, Diversity and Inclusion (EDI) initiatives, we **teamed up with University of Arizona Adaptive Athletics and Tee It Up Enterprises to present the Conquistador Paragolf Championship in April 2021**, which attracted 56 golfers and enhanced awareness of this important program.
- Working with the organizers of the inaugural Saguaro Half Marathon, **1,400 participants were attracted and nearly 200 room nights generated**. In 2022, with COVID-19 restrictions lifted, 50% increases are anticipated, with attendance growing to 2,000 participants representing 300 room nights.



Priorities 2021-22

- **Host the Sports Express Outdoor 2022 conference in February 2022**, bringing 30 rights' holders to Tucson.
- With a Municipal Equality Index of 100 (tied with two other cities for the highest in Arizona), Tucson is well-poised to compete in sports diversity and **LGBTQ+ events will be actively and aggressively pursued in 2021-22.**
- Many sporting events occur in Tucson on an annual basis, attracting athletes, teams, and spectators. **Partner with event organizers to increase the number of spectators at their events.**
- The Korean Baseball Organization will return to Kino Sports Complex for spring training in 2022. Two teams including KT Wiz and the league champion NC Dinos have already confirmed their participation, while others are being pursued. **Each participating team contributes approximately 2,000 room nights.**

PLAYING TO A CROWD

Sporting events, like most events, were impacted tremendously by the global pandemic. **Initially, many professional sports cancelled their season.** After a pause, the NBA chose to continue with a compressed season, where all games and living arrangements occurred in a tightly restricted "bubble". As regular COVID-19 testing became more readily available, other sports franchises resumed, initially playing to empty stadiums and arenas. You may recall, the 2021 Super Bowl, held in Tampa Bay was limited to 30% capacity, of which one-third were vaccinated health care workers.

Similar restrictions occurred in Tucson and Pima County. The Tucson Association of Realtors Fort Lowell Shootout and Tucson Invitational Games were cancelled due to restrictions on out-of-state athletes. The Arizona Bowl was allowed to proceed, but without spectators. By the time MLS pre-season kicked off, the stadium had opened to 20% capacity, but fans were seated in "pods" and concessions weren't available. **If all restrictions are lifted, Tucson Sports is optimistic participant and spectator attendance will grow rapidly in 2021-22.**



MSA Annex

MEXICO MARKETING

Visit Tucson's Mexico marketing department works to increase the number and duration of overnight stays by visitors from Mexico. The department trains partner businesses to be "Mexico ready," and creates and coordinates campaigns in Mexico that advertise Tucson as the preferred destination for shopping, dining, events, and other leisure pursuits. The department's marketing program in Mexico, including two visitor centers in Sonora (located in Hermosillo and Ciudad Obregon), is branded Vamos a Tucson ("Let's Go to Tucson"). Additionally, the Mexico marketing department collaborates with government officials, economic development agencies, and community leaders in Arizona and Mexico on mutually beneficial tourism and trade initiatives.

Mexico is by far the largest source of international visitors to Arizona with four million overnight trips in 2019, according to the Arizona Office of Tourism. Mexican visitors contribute an estimated \$1 billion to metro Tucson's economy every year, according to University of Arizona statistics. *(Due to the extended border closure related to the pandemic, statistics for 2020 are not available.)*

Highlights *2020-21*

- With many government organizations working on the U.S.-Mexico border, it can be difficult to summarize the rules and regulations. As a result, **Felipe Garcia, EVP of Visit Tucson, acted as a de facto spokesperson, clarifying the border restrictions and procedures** during a chaotic year.
- Targeting Spanish-speaking visitors from the U.S. while staying connected with visitors from Mexico, **new Spanish-language collateral was created including a lure brochure, a gastronomy-focused brochure and translation of the Southern Arizona Attractions Alliance Passport**. These guides will be useful as preparations are made for the "revenge demand" that is likely to occur when the border reopens.
- **To generate sales tax revenue**, Mexican shoppers, were provided with a Tucson mailing address for online shopping. Partnering with GotBox, the packages were transported from Tucson to the Vamos a Tucson office in Hermosillo where shoppers could pick them up. During the holiday season more than 100 packages were distributed, including a jacuzzi tub!
- To target media and the travel trade from Mexico, we **collaborated with the Arizona Office of Tourism on a mini tradeshow for ten representatives** visiting the state on a familiarization tour. Attendees represented publications such as *El Financiero*, *Golf & Spa*, and *Vanidades* and tour operators such as Viajes Intermex, Contravel, and *Viajes El Corte Ingles*.

2020-21 KEY PERFORMANCE INDICATORS

30

Meetings with Top Media
from Mexico

32K

Social Media
Engagements

\$896K

Value of Media
Coverage

22

Meetings with
Mexico Officials

Priorities 2021-22

- **Generate private revenue by offering Visit Tucson partners advertising opportunities** to target visitors from Mexico. These opportunities include advertising through our owned media (e-newsletter, website, and social) as well as billboards, television, and newspapers in Sonora and Northern Mexico.
- As the area covered by the I-94 waiver has been expanded to include all of Arizona, **leverage the well-known Vamos a Tucson brand** to remind visitors that Tucson is the ideal destination for shopping, dining, entertainment, and outdoor adventure in the state.
- When the land border reopens, **clarify border-crossing procedures while promoting Tucson and Southern Arizona as "Safe & Clean" destinations.**



THE MEXICAN TABLE BEGINS IN TUCSON

This year, **James Beard award-winning television host, chef, and cookbook author Pati Jinich** featured the Mexican state of Sonora during the ninth season of her show, *Pati's Mexican Table*. But where did she kick-off Season 9? In Tucson, Arizona, of course, the U.S. gateway to Sonora. This episode focused on local baker Don Guerra and featured the beautiful landscapes of the Sonoran Desert surrounding Tucson.

Pati's Mexican Table is televised on PBS, airing in 172 major markets with **an audience of 2.1 - 2.4 million households** per episode (based on WETA and Trac Media). It is also available on Amazon Prime where downloads average 130,000 per month; on the *Pati's Mexican Table* YouTube channel where it has been viewed more than 33,000 times; and on pbs.org.

When the premiere episode of Season Nine launched, Jinich partnered with Visit Tucson to promote a giveaway to her **158,000 e-mail subscribers** and on her Facebook and Instagram platforms where it garnered more than **60,000 impressions and 3,000 entries**. Collaborations such as this are immensely valuable as it is unlikely Visit Tucson could afford to purchase the equivalent advertising.



White Stallion Ranch

TOURISM

Visit Tucson's tourism department promotes Tucson and Southern Arizona as a leisure destination to domestic and international receptive operators, tour operators, travel agents and group tour companies. Other duties include conducting seminars to educate travel professionals about how best to market our destination; connecting clients directly with partner hotels and attractions using a strategic sales approach; collaborating with tour operators on cooperative advertising; and coordinating site inspections and familiarization (FAM) tours so travel professionals can experience the region first-hand.

2020-21 KEY PERFORMANCE INDICATORS

1,241
ROOM
NIGHTS

1,314
CLIENTS
EDUCATED

4
FAMs/
SITE INSPECTIONS

Highlights *2020-21*

- Maintaining relationships with the travel trade and securing future bookings were top priorities through the pandemic. In 2020-21, we **connected with nearly 200 domestic and international tour operators** at six virtual and two in-person tradeshows.
- Many travel agents, especially those in Europe, had time to increase their destination knowledge, ensuring they were better prepared to service their clients when travel resumed. Through a partnership with the Arizona Office of Tourism that spanned multiple campaigns, **more than 1,100 travel agents and tour operators were trained as Tucson and Arizona specialists.**
- As demand for outdoor recreation grew, **bike tour operators capable of bringing visitors to Tucson via private, customizable packages were identified and targeted.** Working with three key, domestic bike tour operators, more than 1,000 room nights were generated.



Sabino Canyon Crawler

OPTIMISM IS IN THE AIR

Like the meetings business, **tour operators suffered widespread cancellations when pandemic restrictions were implemented.** Initially, many group leisure travelers were willing to postpone their spring 2020 trips to departures scheduled for fall 2020. However, as infections increased and the situation worsened, many chose to cancel their trips and obtain a full refund. At Visit Tucson, most tour operator room nights generated actualize in the same year. Despite the short timeline, we still tracked the cancellation of 541 room nights due to COVID-19, approximately 7% of the typical room nights booked annually.

Many people who choose to book their vacation through a tour operator, particularly those in the U.S., tend to be older adults who were prioritized for vaccinations. This is one of the reasons **the rebound for leisure group travel has already begun**, especially in the areas of small group and private departures along with itineraries that focus on outdoor activity. According to a survey conducted by the U.S. Tour Operator Association in April 2021, eight out of ten of their active members are “enthusiastic” to “cautiously optimistic” for a complete resumption of business by the end of 2021.

Priorities 2021-22

- Kickstart travel agent bookings in Tucson by working with Northstar Travel Group to **host the Global Travel Marketplace at the Westin La Paloma Resort & Spa, September 17-19, 2021.** More than 90 agents are anticipated to attend this premiere conference and experience Tucson first-hand through off-site functions and pre- and post-familiarization tours.
- **Generate 4,000 room nights by targeting domestic tour operators** who have the greatest propensity to resume or launch itineraries that feature Tucson and Southern Arizona. Actively participate in three key domestic tradeshows organized by the National Tour Association and the American Bus Association.
- As travel restrictions are reduced and eliminated, **re-establish relationships with U.S.-based receptive operators and international tour operators** to promote Tucson’s wide-open spaces and contribute to our room night goal.
- **Create a new itinerary that showcases the culture and history of African Americans, Asian Americans, and Native Americans** in Tucson and Pima County, and promote it on our website and at three domestic tradeshows.



FILM TUCSON

Film Tucson markets Tucson and Southern Arizona as a production location for feature films, TV shows, print and television commercial advertising, and other filmed content that generates economic impact for our region. Other duties include advocating for and supporting the local film industry; partnering with the University of Arizona's School of Theater, Film and Television to host industry professionals; and collaborating with local film festivals to market Tucson as a production location to visiting filmmakers.

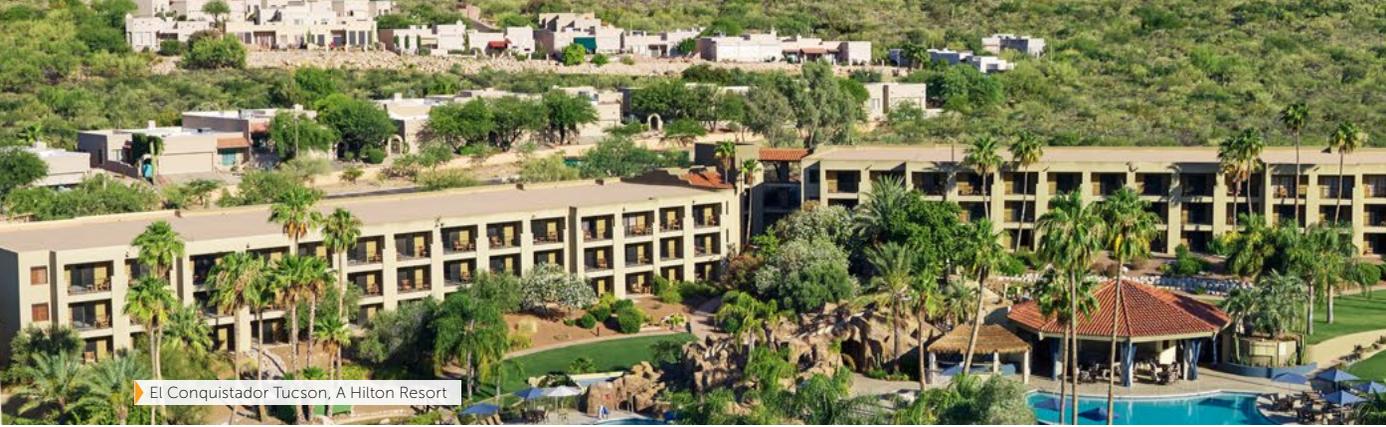
2020-21 KEY PERFORMANCE INDICATORS

| | | | | |
|--------------------------------|-------------------------------------|--------------------------|---------------------|-----------------------|
| 8,608 Room Nights | \$6.4M Direct Spending | 2,253 Job Days | 114 Leads | 24 Projects |
|--------------------------------|-------------------------------------|--------------------------|---------------------|-----------------------|

Highlights *2020-21*

- **With the support of local hotels and resorts, competitive proposals for full and partial property buyouts were submitted** to host productions which required the implementation of strict COVID-19 protocols.
- **Generated more than \$6 million in direct spending and 172 production shoot days** by securing production of three major reality television shows: VH1's Love & Hip Hop, Discovery Channel's Naked & Afraid, and Food Network's Best Baker in America.
- **Showcased Tucson's wide-open spaces in online advertising** specifically geared towards COVID-cognizant productions needing larger areas which can accommodate the needs of a post-pandemic film industry.

Tucson Mountain Retreat



El Conquistador Tucson, A Hilton Resort

Priorities **2021-22**

- Due to the potential publicity, enormous scope, and immense economic impact of this project, **focus efforts on a major TV series that has begun pre-production for a pilot episode, with filming to possibly commence this fall.** Substantial support from Visit Tucson, as well as the the City of Tucson, Pima County, Rio Nuevo, and the State of Arizona was a key factor for the network choosing Tucson as the main location.
- **Continue implementing the “Border Ready” program** by collaborating with Vamos a Tucson, Arizona Film & Digital Media, Sonora Film Office, and other local and federal authorities to

streamline the cross-border filmmaking process. Although filmmakers from Mexico are currently dealing with COVID regulations in the U.S., we will continue to market to American and international filmmakers who wish to shoot border stories on the U.S. side of the border.

- Participate in key film festivals and trade shows such as the Guadalajara International Film Festival, FOCUS UK and RealScreen to **increase the economic impact from film production in Southern Arizona**, especially reality television and commercial advertising.



WORKING IN A BUBBLE

As COVID-19 restrictions were implemented in March 2020, film production around the world came to an immediate halt. Movie, television, and commercial productions typically involve a large cast and crew, and to **restart filming it was necessary to find a way to bring people back together safely.** Over the next few months, production companies determined they could get back to business by isolating their teams, testing them frequently for COVID-19, and keeping every member of the cast and crew quarantined from the outside world. This model, known as a “production bubble”, was easily and successfully adapted for unscripted programs (a.k.a. reality TV).

Working with local hotels and resorts, **Film Tucson facilitated several “bubble” proposals and landed three reality TV shows.** VH1’s Family Reunion: Love & Hip Hop Edition took over the entire property of El Conquistador Tucson, A Hilton Resort in January 2021. Similarly, Discovery Channel’s Naked and Afraid bought out El Coronado Ranch in Sunsites and Kenyon Ranch in Tubac to film two back-to-back episodes. Meanwhile, Food Network’s Best Baker in America filled an entire wing (and erected a massive tent as their sound stage) at the JW Marriott Tucson Starr Pass Resort & Spa to produce their fourth season, which was focused on the Southwest.



Pima County Courthouse

PARTNERSHIP & VISITOR SERVICES

Visit Tucson's partnership and visitor services departments serve as the liaison between Visit Tucson and its travel industry partners in metro Tucson and Southern Arizona. The visitor services department provides visitors with destination information and connects them to Visit Tucson partner businesses offering local experiences that can enhance their stays. The partnership department strengthens relationships with partners through regular communications, training sessions, and exclusive events.

2020-21 KEY PERFORMANCE INDICATORS

| | | |
|--|--|--|
| 502 Partner Businesses | 520 Virtual Event Attendees | 1,731 Partner Outreach Communications |
| 196 Active Certified Tourism Ambassadors™ | 13,496 Visitor Inquiries Assisted | |

Highlights *2020-21*

- With in-person events canceled, **an online Certified Tourism Ambassador™ (CTA) training program was spearheaded**, the first of its kind in the country. A consistent schedule of CTA virtual classes was offered throughout the fiscal year, many in cooperation with local associations and organizations such as the Tucson Association of Realtors.
- After an extended closure of 14 months, the **Southern Arizona Heritage & Visitor Center safely reopened in May 2021**. While the days and hours of operation were initially limited, it is expected to return to a full schedule in fall 2021. Our thanks to Pima County for building this incredible visitor amenity in the Historic Pima County Courthouse.
- **Enhanced partner engagement with consistent one-on-one communications**. We listened. We checked-in. We supported. We followed-up.



Southern Arizona Heritage & Visitor Center

Priorities 2021-22

- Beginning on July 1, 2021, **launch a new partnership model for non-lodging partners**, designed to simplify the options while adding value at each level. An extensive partner outreach campaign will increase awareness of the new model while improving partner recruitment and retention.
- **Kick-off our return to in-person events** in the second half of the year with Meet & See networking events, Partner Orientations, and Tucson Tourism Trends.
- As a follow-up to our virtual training program, **the Certified Tourism Ambassador™ program will be further expanded with additional focus on the value and contributions of the tourism industry**, ensuring CTA graduates are representatives for the community and the industry.

EXTENDING A HELPING HAND

When COVID restrictions were announced, Visit Tucson quickly realized the pandemic would have a massive impact on our industry. Understanding that **partners would likely take a significant financial hit**, the decision was made to offer them six months' free membership, despite the realization this would effectively cut Visit Tucson's member revenue in half. Each partner was personally contacted by Visit Tucson staff and notified of the extension which was granted in the month their dues came up for renewal.

To further assist restaurants, Visit Tucson sponsored Sonoran Restaurant Week Tucson-To-Go in April 2020 which encouraged locals to pick-up food from their favorite restaurants. This was followed by the 2nd Annual Sonoran Restaurant Week in October 2020, which featured three-course meals at a set price with in-person dining and/or take-out, depending on the restaurant. **To support attractions, we worked closely with the Southern Arizona Attractions Alliance** to launch a web page, VirtualTucson.org, and campaign to promote virtual tours and content. This was followed by a collaboration with ten top attractions to drive memberships in September 2020. For hotels and other partners, Visit Tucson advocated at the local, state, and national levels to ensure all metro Tucson businesses had the tools they needed and were considered for inclusion in stimulus programs.

BOARD SERVICE & STAKEHOLDER PARTICIPATION

Visit Tucson staff collaborated with 56 boards, committees and civic and professional organizations in fiscal year 2020-21.

- Agave Heritage Festival
- Arizona Bowl
- Arizona Lodging & Tourism Association
- Arizona-Mexico Commission
- Arizona Society of Association Executives
- Arizona Town Hall
- Cinema Tucson Committee
- City of Tucson
- Copper State Youth Sports Experience Committee
- Conquistador ParaGolf Championship Committee
- Délice Network
- Desert Thunder Squadron
- Destinations International
- Destination Marketing Association West
- Downtown Tucson Partnership
- Festivals & Events Association of Tucson & Southern Arizona
- Friends of Saguaro National Park
- Girl Scouts of Southern Arizona
- Governor's Tourism Advisory Council
- Greater Tucson Leadership
- Green Valley-Sahuarita Chamber of Commerce
- Hotel Sales and Marketing Association International, AZ Chapter
- JTED Business Industry Council
- Junior League of Tucson
- Key Group
- Meeting Professionals International, Arizona Sunbelt Chapter
- National Charity League
- National Tour Association, DEI Advisory Committee
- Network for Arizona Trails
- Park Tucson Commission
- Pima Association of Governments, Regional Transportation Authority
- Pima County
- Pima County Loop Advisory Committee
- Public Relations Society of America
- Rio Nuevo
- Rotary Club of Tucson
- Santa Cruz Valley Heritage Alliance, Inc.
- SKAL Club of Tucson
- Society of Government Meeting Professionals, AZ Chapter
- Southern Arizona Arts & Cultural Alliance
- Southern Arizona Attractions Alliance
- Southern Arizona Leadership Council
- Sports Events & Tourism Association
- Sun Corridor Inc.
- Town of Oro Valley
- Tucson Business Alliance
- Tucson City of Gastronomy
- Tucson Clean & Beautiful
- Tucson Conquistadores
- Tucson Jazz Festival
- Tucson Metro Chamber
- Tucson-Mexico Sister Cities
- Tucson Young Professionals
- UNESCO Creative Cities Network
- University of Arizona, Galileo Circle
- University of Arizona Athletics, Hispanic Heritage Advisory Council



San Xavier del Bac Mission



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Visit Tucson employs 30 full-time and six part-time employees.

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