

Visitors to Arizona's North Central Region

Prepared by
Arizona Office of Tourism
Research Division



Introduction

This summary is a compilation of several sources; economic impact data from Dean Runyan Associates, visitor volume from Longwoods, profile data from Tourism Economics, visitor Visa card spending from Buxton, and online travel search and book data from nSight. Each source utilizes a different methodology; the Arizona Office of Tourism aggregates and interprets the data to create a more complete picture of the Arizona visitor. AOT utilizes this data to target potential visitors, create impactful marketing campaigns, and assist Arizona communities in marketing their destination.

What is the economic impact of visitors to the North Central Region?

Source: Dean Runyan Associates

North Central Arizona Travel Impacts, 2004-2012p

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	694	813	843	812	851	899	916
Other Travel*	45	60	67	61	70	75	75
Total Direct Spending	739	873	910	874	921	974	992
Visitor Spending by Type of Accommodation (\$Million)							
Hotel, Motel	218	289	277	250	261	293	309
Private Home	88	105	115	117	127	130	129
Campground	21	17	26	25	27	27	27
Vacation Home	31	35	38	37	39	40	40
Day Travel	336	368	388	382	398	408	410
Destination Spending	694	813	843	812	851	899	916
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	102	136	139	121	126	142	151
Food Service	130	152	157	161	166	176	183
Food Stores	52	55	62	61	64	66	67
Local Tran. & Gas	61	86	106	97	117	124	120
Arts, Ent. & Rec.	244	269	268	261	263	273	277
Retail Sales	105	114	110	111	113	116	117
Visitor Air Tran.	0	1	0	1	1	2	1
Destination Spending	694	813	843	812	851	899	916
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	79	96	107	96	100	111	121
Arts, Ent. & Rec.	86	98	102	93	87	89	85
Retail**	23	27	28	25	25	25	25
Visitor Air Tran.	0	0	0	0	0	0	0
Other Travel*	7	8	9	7	6	6	8
Total Direct Earnings	195	230	246	221	219	232	239
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	4.3	4.6	4.7	4.2	4.3	4.6	4.8
Arts, Ent. & Rec.	5.3	5.3	5.2	4.7	4.6	4.6	4.3
Retail**	1.0	1.1	1.2	1.0	1.0	1.0	1.0
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.4	0.4	0.3	0.3	0.2	0.2	0.2
Total Direct Employment	10.9	11.3	11.5	10.2	10.1	10.4	10.3
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	24.4	28.8	31.2	29.9	31.8	33.5	32.9
State Tax Receipts	31.8	38.5	40.0	39.0	41.9	44.2	43.6
Total Direct Gov't Revenue	56.2	67.4	71.2	68.9	73.7	77.7	76.4

Details may not add to totals due to rounding.

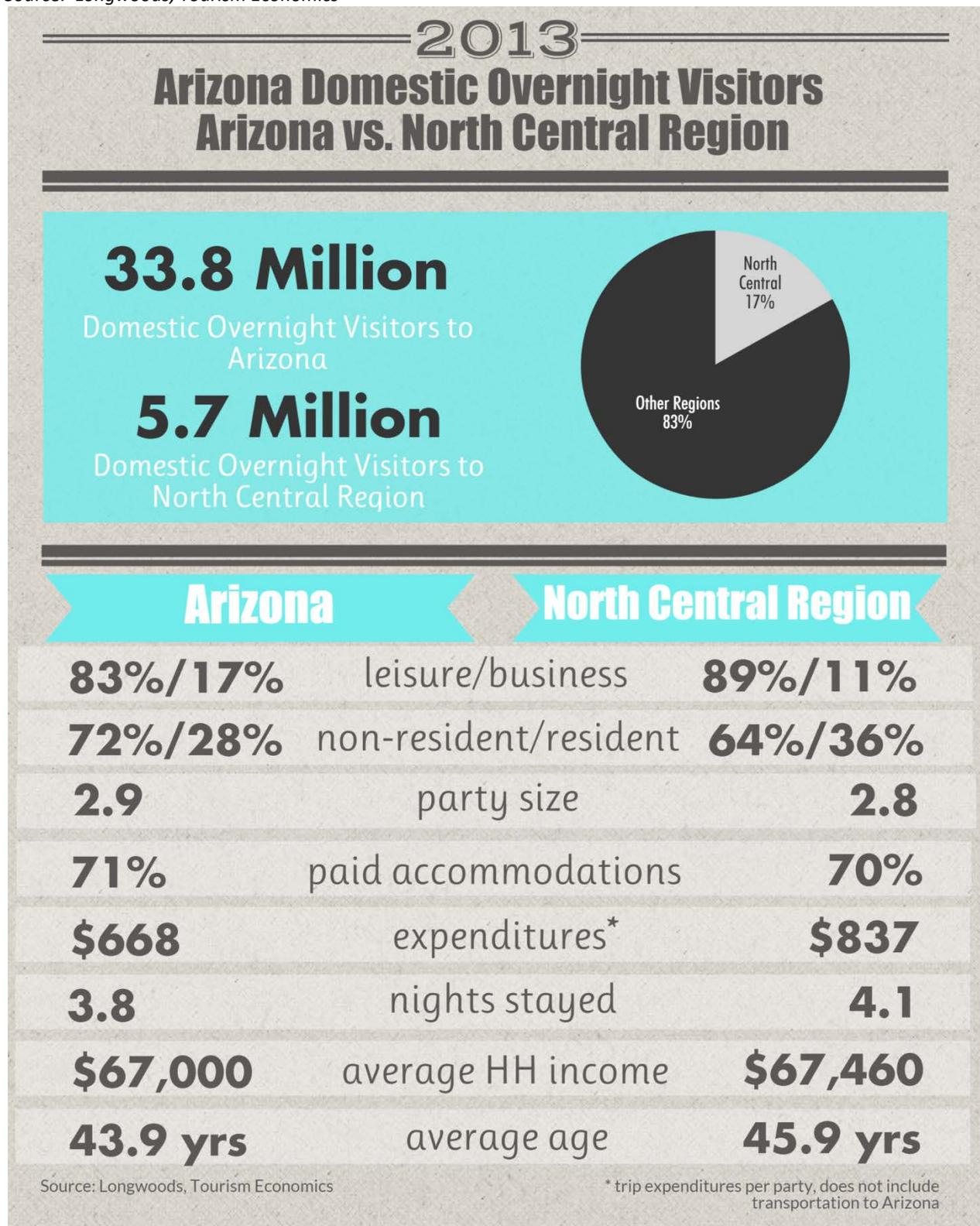
*Other Travel includes resident air travel, travel arrangement services, and convention and trade shows.

**Retail includes gasoline.

North Central Arizona includes Gila and Yavapai counties.

Who visits the North Central Region?

Source: Longwoods, Tourism Economics



North Central Region: Visitor Profile Based on Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

Visitor Profile:

- Age Range of 55+ (67% of spend)
- Professional Occupation/Retired (70% of spend)
- College Educated (65% of spend)
- Income level of \$50K+ (54% of spend)
- Married (62% of spend)

Top Visitor Segments

These segments represent approximately 38% of North Central region visitation spending. For more detailed data on the segments, visit:

<http://guides.business-strategies.co.uk/mosaicusa2011/html/animation.htm>

1. C11 – Aging of Aquarius

- Age: 85% are between 51-65
- Income: 65% have a household income greater than \$100,000/year
- Children in Household: less than 1%
- Travel domestically: 58%

2. A02 – Platinum Prosperity

- Age: 60% are between 51-65
- Income: 100% have a household income greater than \$100,000/year
- Children in Household: 4%
- Travel domestically: 64%

3. A01 – American Royalty

- Age: 48% are between 51-65
- Income: 87% have a household income greater than \$100,000/year
- Children in Household: 26%
- Travel domestically: 60%

4. B07 – Generational Soup

- Age: 55% are between 51-65
- Income: 68% have a household income greater than \$100,000/year
- Children in Household: 38%
- Travel domestically: 60%

5. C13 – Silver Sophisticates

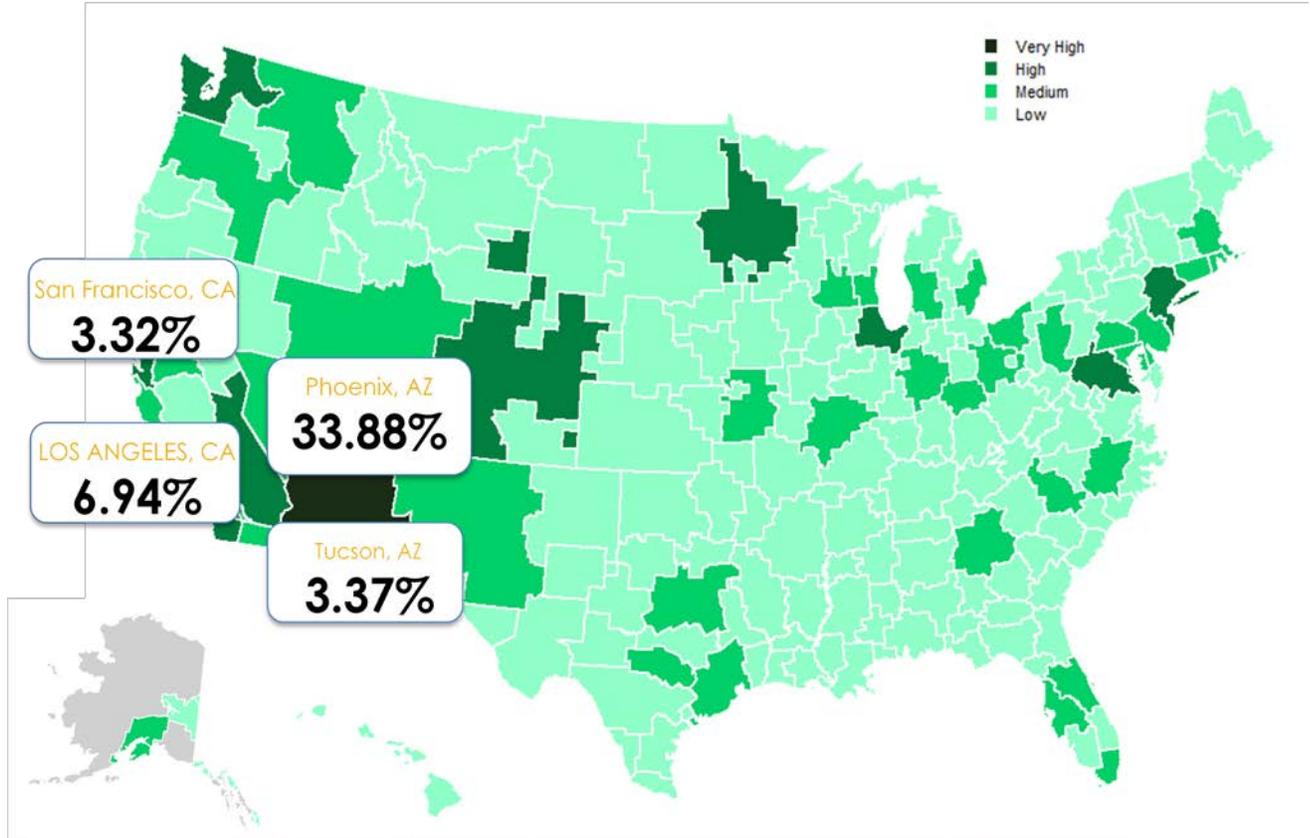
- Age: 58% are between 51-75
- Income: 49% have an income greater than \$100,000/year

- Children in Household: 3%
 - Travel domestically: 49%
- 6. E21 – Unspoiled Splendor**
- Age: 90% are between 51-65 years old
 - Income: 24% have a household income greater than \$100,000/year
 - Children in Household: 1.6%
 - Travel domestically: 47%
- 7. J34 – Autumn Years**
- Age: 82% are over the age of 66
 - Income: 20% have a household income greater than \$100,000/year
 - Children in Household: 2%
 - Travel domestically: 42%
- 8. Q62 – Reaping Rewards**
- Age: 68% are over the age of 76
 - Income: 17% have a household income greater than \$100,000/year
 - Children in Household: 0.6%
 - Travel domestically: 45%

North Central Region: Top Visitor Cities of Origin by Visa Card Spend

Period: May 2013-April 2014

Source: Buxton

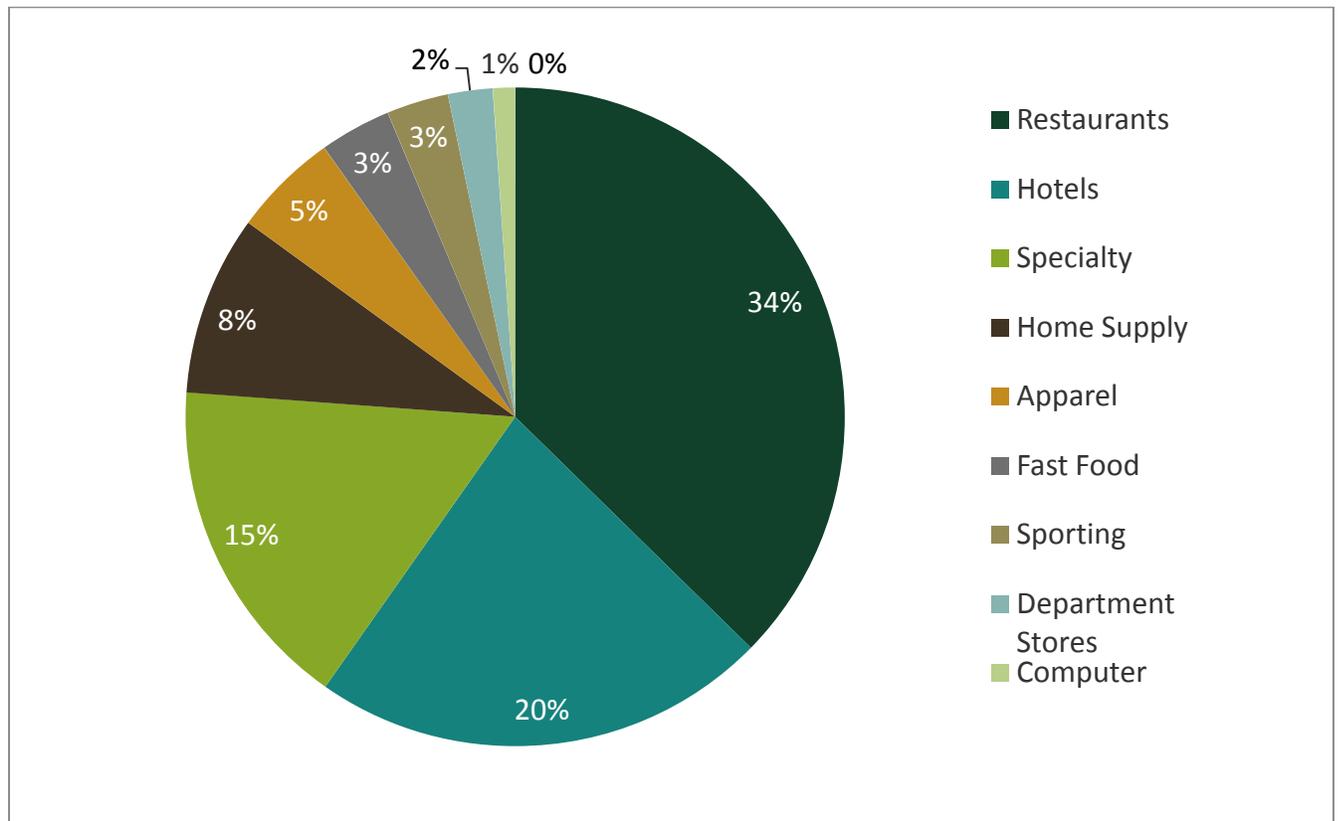


	Top DMAs	% of Spend
1	Phoenix (Prescott) AZ	33.88%
2	Los Angeles CA	6.94%
3	Tucson (Sierra Vista) AZ	3.37%
4	San Francisco-Oakland-San Jose CA	3.32%
5	Chicago IL	3.12%
6	New York NY	2.84%
7	Seattle-Tacoma WA	2.66%
8	San Diego CA	2.01%
9	Denver CO	1.98%
10	Minneapolis-St. Paul MN	1.97%

North Central Region: Overall Visitor Spend by Category

Period: May 2013-April 2014

Source: Buxton



Share of Spending on Hotels from Top Source Markets:

Of the top ten source markets, what percentage of the total expenditure is for overnight accommodation?

	Top DMAs	% of Spend on Hotels
1	Phoenix (Prescott) AZ	15.9%
2	Los Angeles CA	25.0%
3	Tucson (Sierra Vista) AZ	26.3%
4	San Francisco-Oakland-San Jose CA	31.2%
5	Chicago IL	29.5%
6	New York NY	34.9%
7	Seattle-Tacoma WA	24.8%
8	San Diego CA	24.7%
9	Denver CO	22.7%
10	Minneapolis-St. Paul MN	21.8%

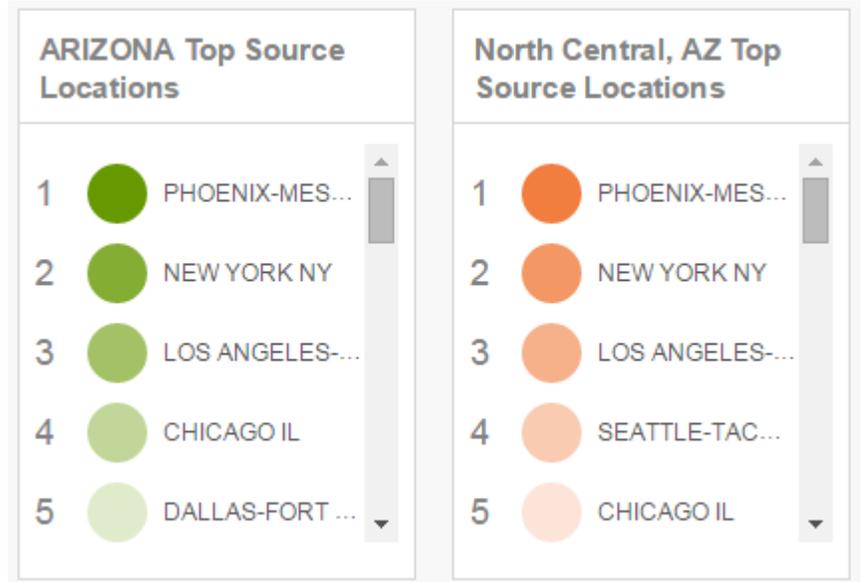
North Central Region: Where are visitors searching from?

Period: May 2013-April 2014 (Travel Date)

Source: nSight

Top Ten Source Locations for North Central Region:

1. Phoenix-Mesa, AZ
2. New York, NY
3. Los Angeles-Riverside-Orange County, CA
4. Seattle-Tacoma, WA
5. Chicago, IL
6. San Diego, CA
7. Nuremberg, DE
8. San Jose, CA
9. Lubeck, DE
10. San Francisco, CA



Search to Stay Trend

The average number of days from the time a visitor begins searching to the time they arrive at the destination.

