



# North Central Region 2015 Year-End Data Review



---

# AOT Research Staff



Ralph Coleman, Jr.  
Director of Research

[rcoleman@tourism.az.gov](mailto:rcoleman@tourism.az.gov)

602-364-4158



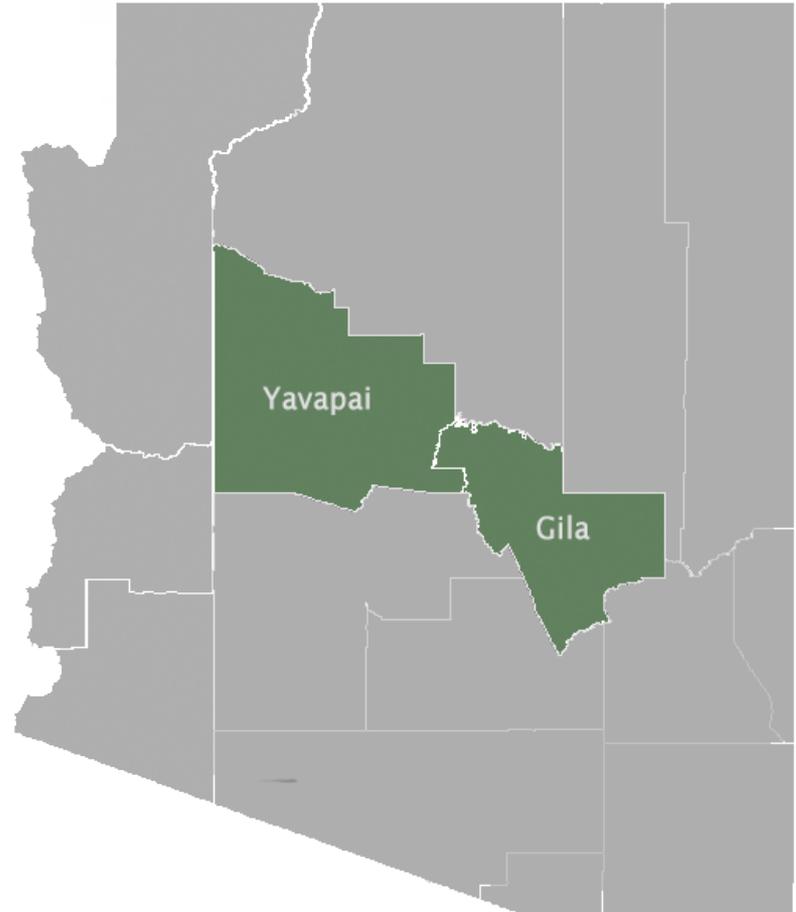
Colleen Floyd  
Research Manager

[cfloyd@tourism.az.gov](mailto:cfloyd@tourism.az.gov)

602-364-3716

# Agenda

- Statewide Overview
- Economic Impact of Tourism
- Regional Visitor Profile
- Regional International Visa Card Spending Profile
- Year-To-Date Indicators



Presentation slides available at:

<https://tourism.az.gov/research-statistics>

# 2015 Arizona Tourism Industry Performance

**42.1 Million**

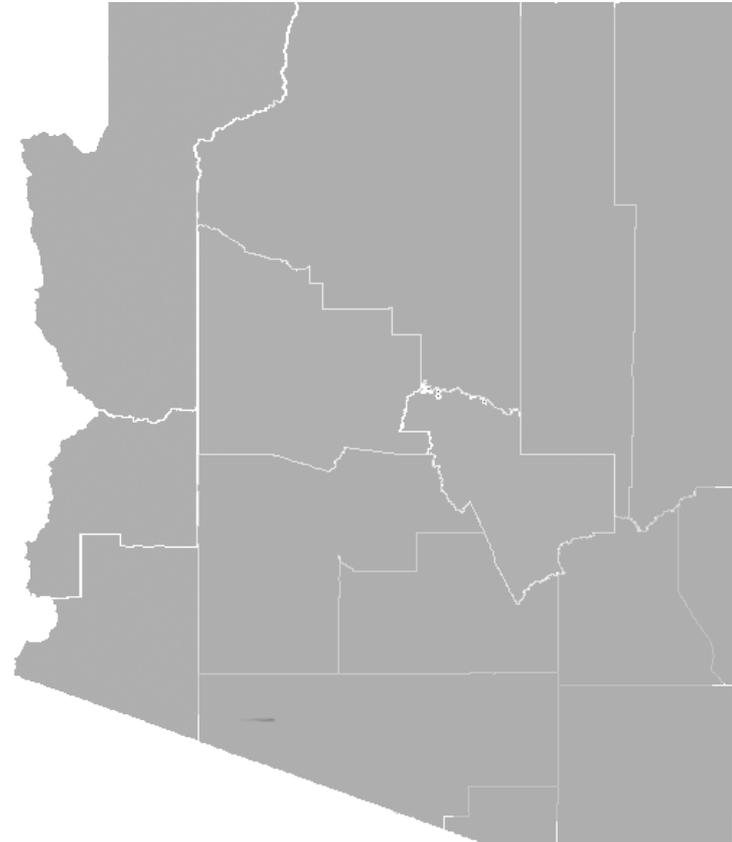
Overnight Visitors

Up 3.4% YOY

**\$21.0 Billion**

Direct Spending

Up 1.3% YOY



---

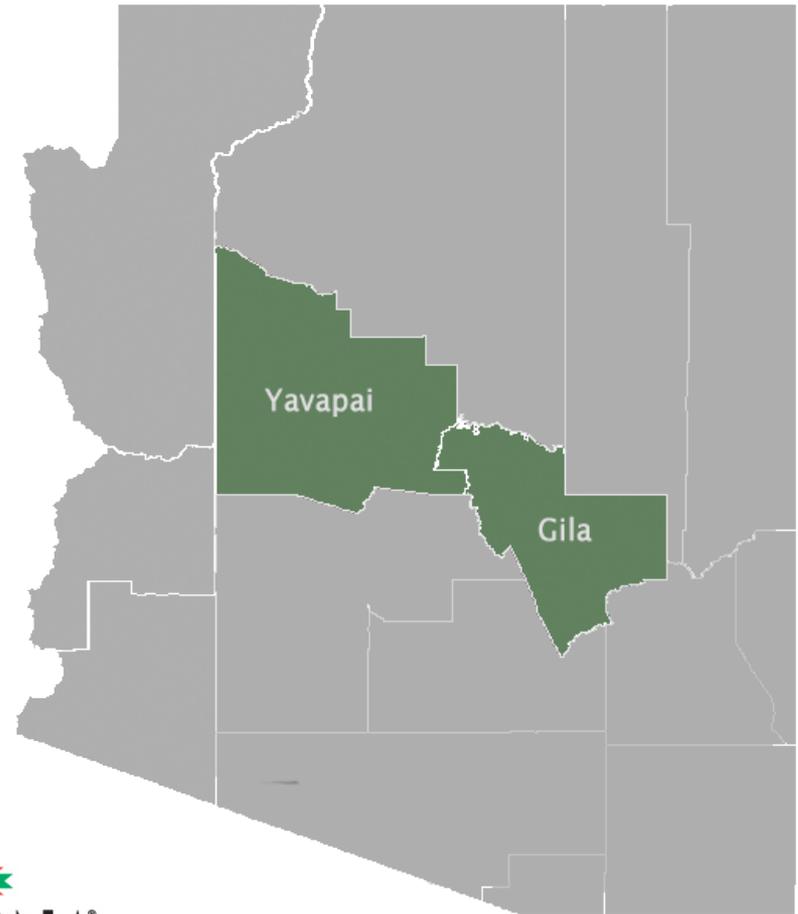
# 2015 North Central Region Industry Performance

**5.2 Million**

Domestic Overnight  
Visitors

**\$1.0 Billion**

Direct Spending



---

# Primary Research Partners



- Domestic Travel Only
- Annual, Nationally Representative Survey
- Regional Visitor Volume
- Visitor Origins
- Visitor Age
- Activities Participated

- Economic Impact of Travel
- Domestic and International Spending
- Jobs, Earnings, Taxes Generated
- Spending by Accommodation Type
- Spending by Commodity Purchased
- Regional, County, and Legislative District Data Available

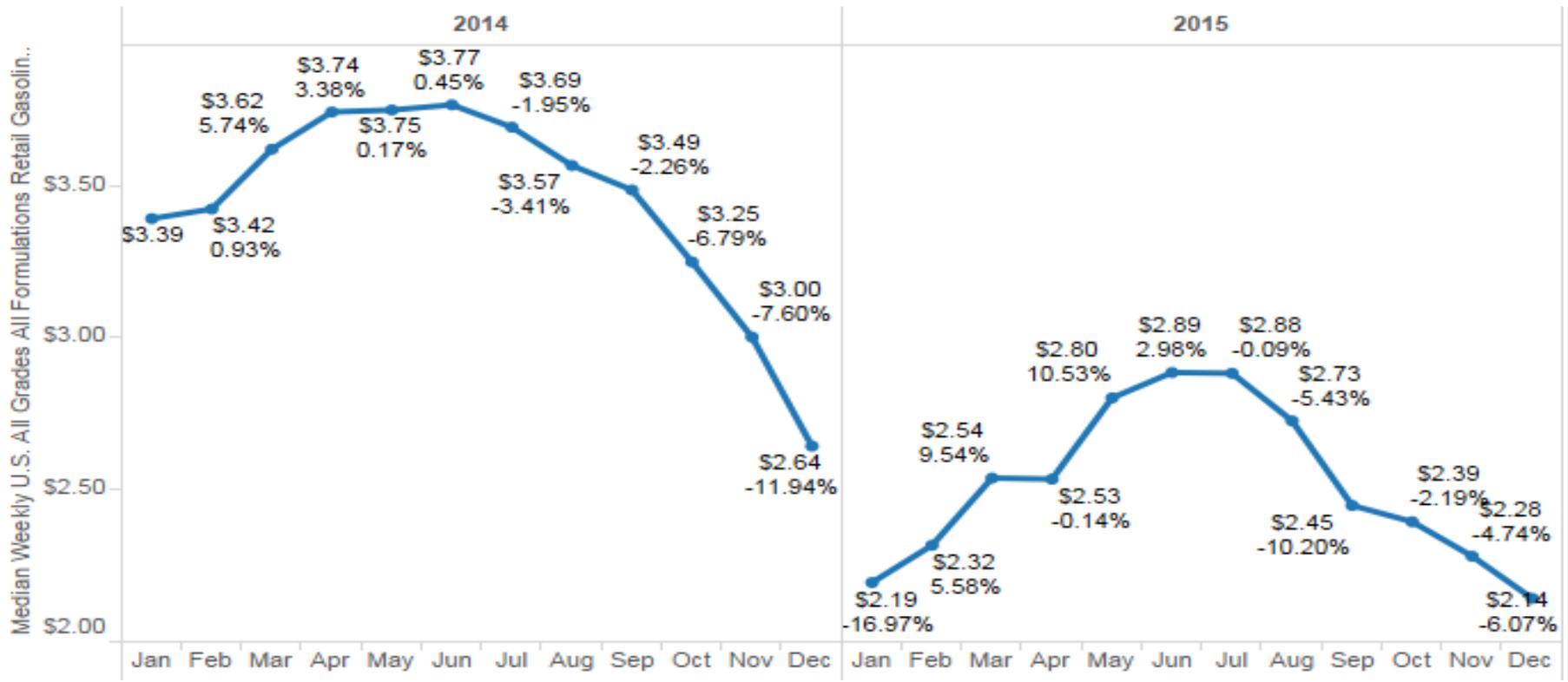
---

# ECONOMIC IMPACT OF TRAVEL 2015

North Central Region

# Gasoline Price Impact

National Gas Price Line Chart



# Visitor Spending & Economic Impact

<https://tourism.az.gov/research-statistics/economic-impact>

Dean Runyan Associates

## Arizona Travel Impacts 1998-2015p



Photo courtesy of Arizona Office of Tourism

June 2016

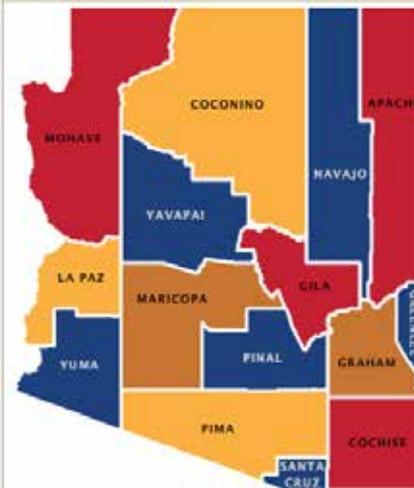
*Prepared for the*

Arizona Office of Tourism  
Phoenix, Arizona

### ARIZONA TRAVEL IMPACTS

Access data by clicking on county map, or switch tab for region or state map

#### Select County



Select Legislative District

Select Region

Select State

You now have direct access to travel impact data, as reported in the Economic Impact reports, prepared annually by Dean Runyan Associates, Inc. for the Arizona Office of Tourism. The Economic Impact Report includes direct economic impacts of travel to and through Arizona and its regions, counties and legislative districts in categories listed below:

#### Direct Travel Spending

Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.

#### Direct Earnings

The earnings (wage and salary disbursements, earned benefits and proprietor income) of employees and owners of businesses that are attributable to travel expenditures.

#### Direct Employment

Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.

#### Direct Tax Receipts

Tax receipts collected by state, counties and municipalities, as levied on applicable travel-related purchases, including lodging, food and beverage service, retail goods and motor fuel.

#### Download PDF Reports:

- Arizona State, Regional and County Travel Impacts
- Arizona Travel Impacts by Legislative District

Dean Runyan Associates

This web application was prepared for the Arizona Office of Tourism.  
© Dean Runyan Associates, Inc. 2007-2016



# Spending by Type of Accommodation

Accommodation Type	2014 Share	2015 Share
Hotel, Motel	35%	37%
Private Home	14%	13%
Campground	3%	3%
Vacation Home	4%	4%
Day Travel	44%	42%
Destination Spending	100%	100%

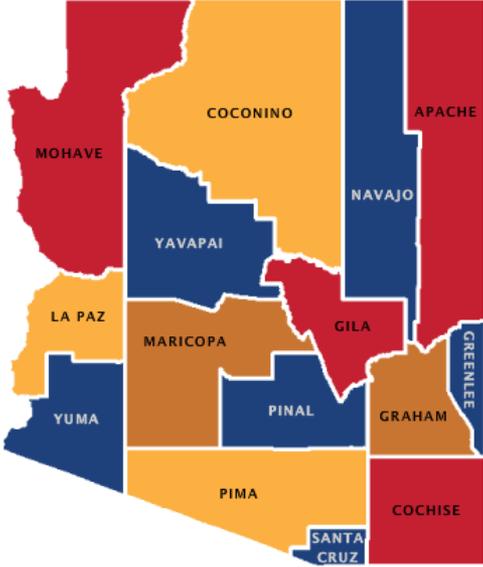


# Interactive Data Tool and App

## ARIZONA TRAVEL IMPACTS

Access data by clicking on county map, or switch tab for region or state map

**Select County**



**Select Legislative District**

**Select Region**

**Select State**

You now have direct access to travel impact data, as reported in the Economic Impact reports, prepared annually by Dean Runyan Associates, Inc. for the Arizona Office of Tourism. The Economic Impact Report includes direct economic impacts of travel to and through Arizona and its regions, counties and legislative districts in categories listed below:

**Direct Travel Spending**  
Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.

**Direct Earnings**  
The earnings (wage and salary disbursements, earned benefits and proprietor income) of employees and owners of businesses that are attributable to travel expenditures.

**Direct Employment**  
Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.

**Direct Tax Receipts**  
Tax receipts collected by state, counties and municipalities, as levied on applicable travel-related purchases, including lodging, food and beverage service, retail goods and motor fuel.

**Download PDF Reports:**

-  [Arizona State, Regional and County Travel Impacts](#)
-  [Arizona Travel Impacts by Legislative District](#)

Dean Runyan Associates

This web application was prepared for the Arizona Office of Tourism.  
© Dean Runyan Associates, Inc. 2007-2016



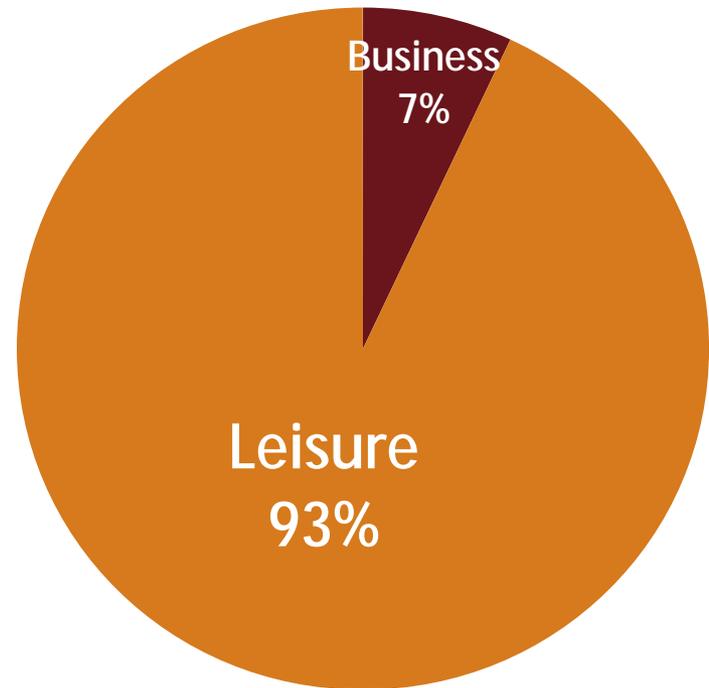
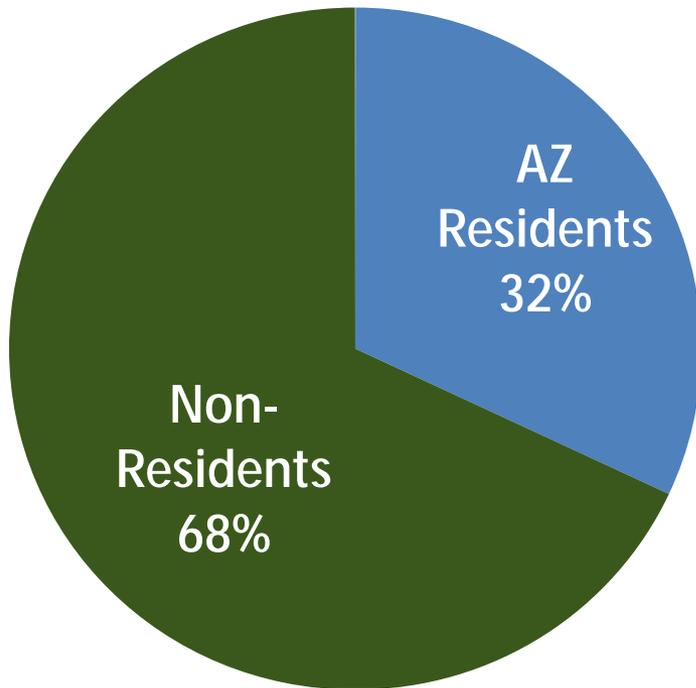
---

# DOMESTIC OVERNIGHT VISITOR PROFILE 2015

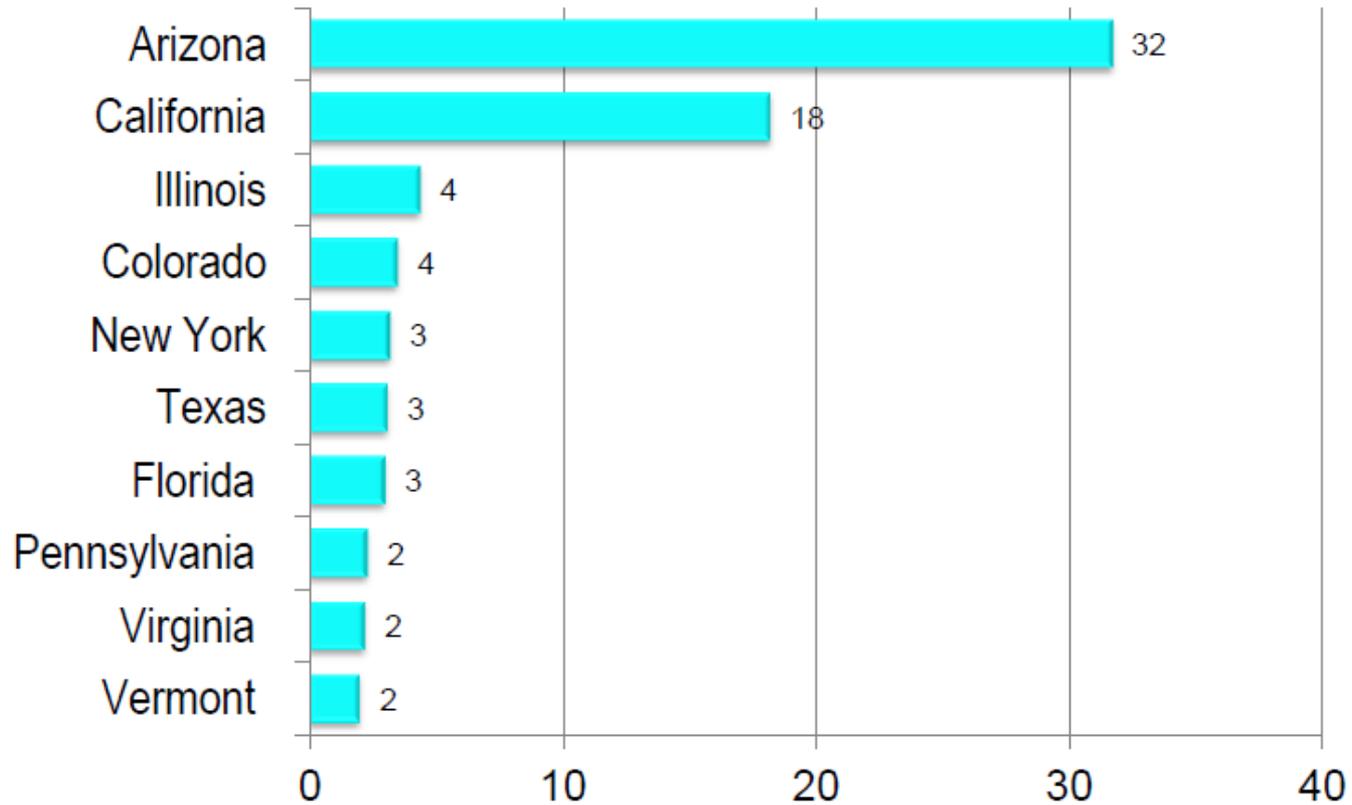
North Central Region

---

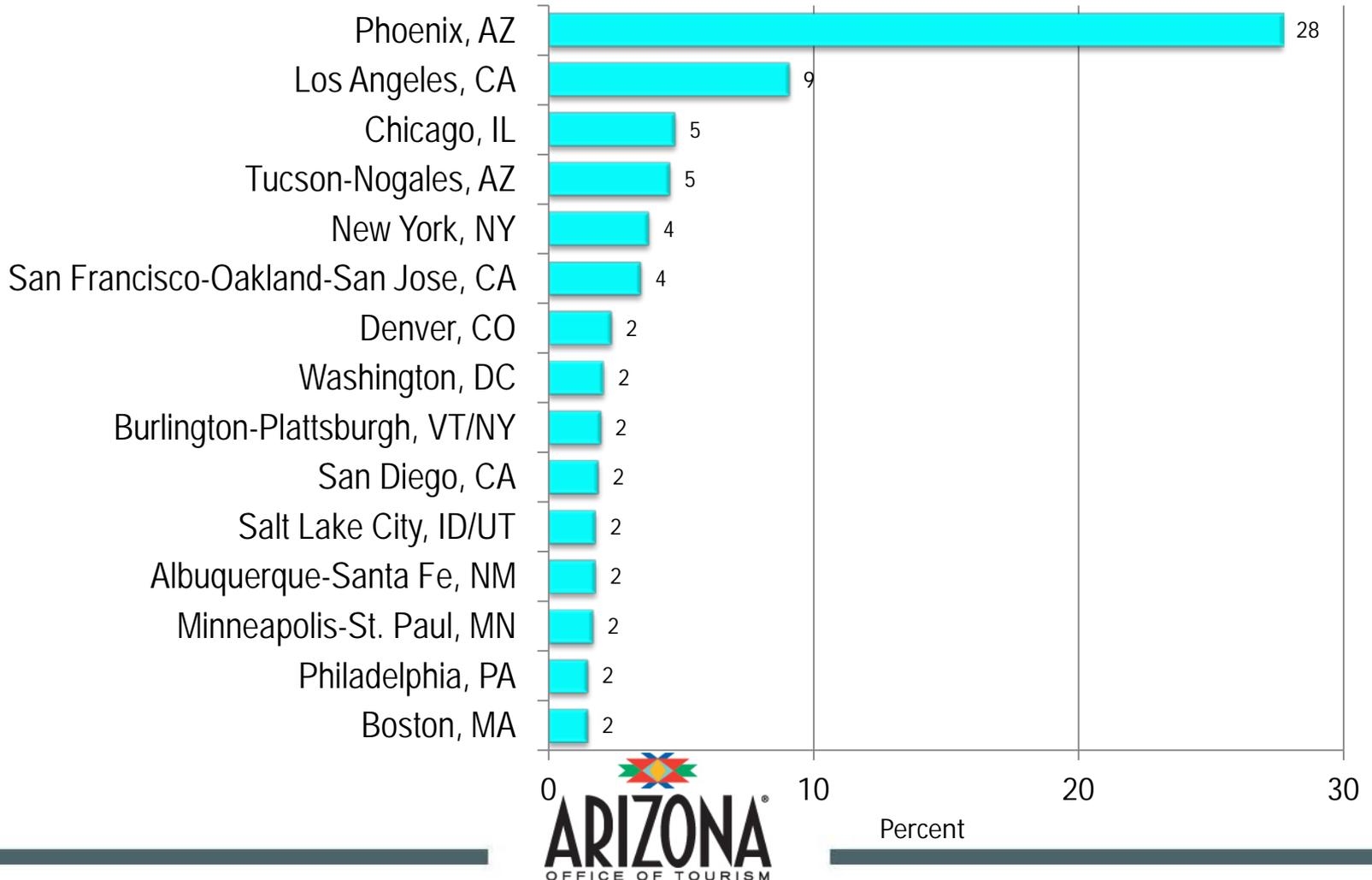
# 2015 NORTH CENTRAL REGION OVERNIGHT VISITOR PROFILE



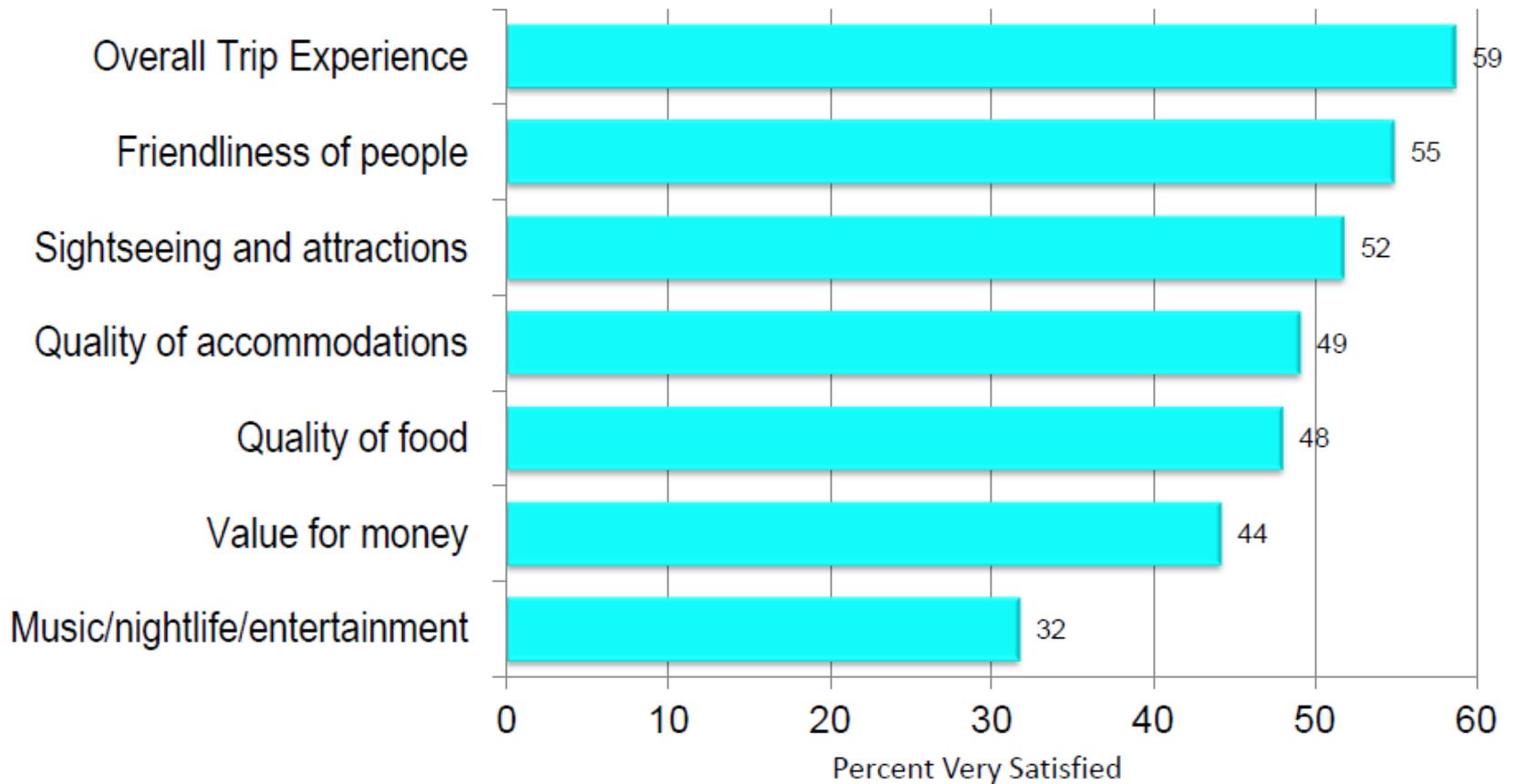
# State of Origin of Overnight Trip



# DMA of Origin of Overnight Trip



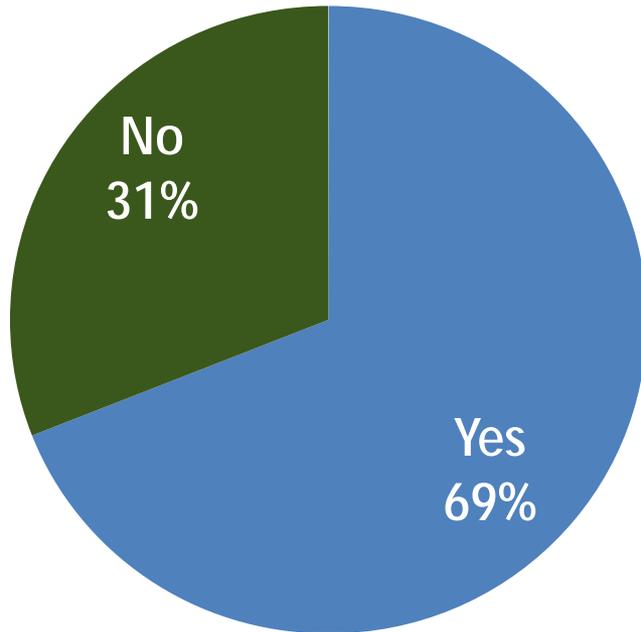
# Trip Satisfaction - % Very Satisfied



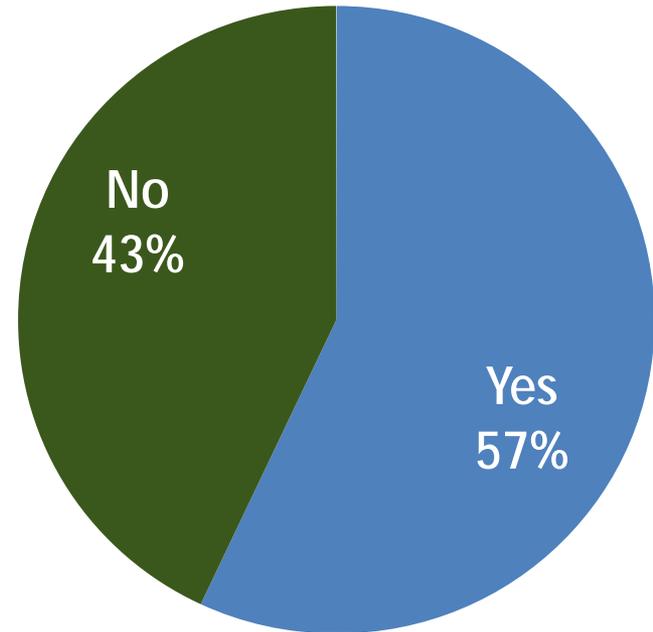
---

# Past Visitation

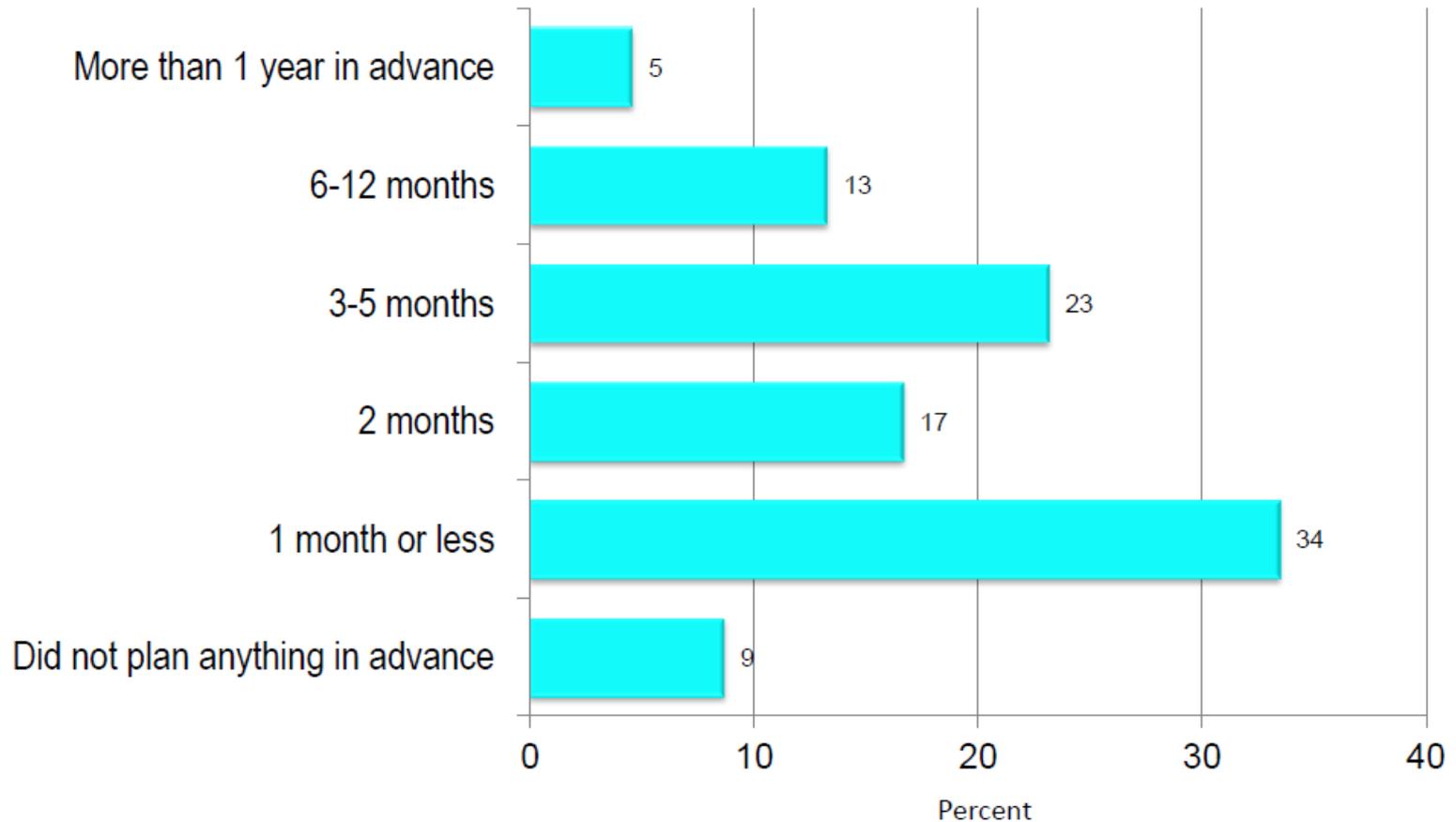
Have you ever visited the North Central Region before?



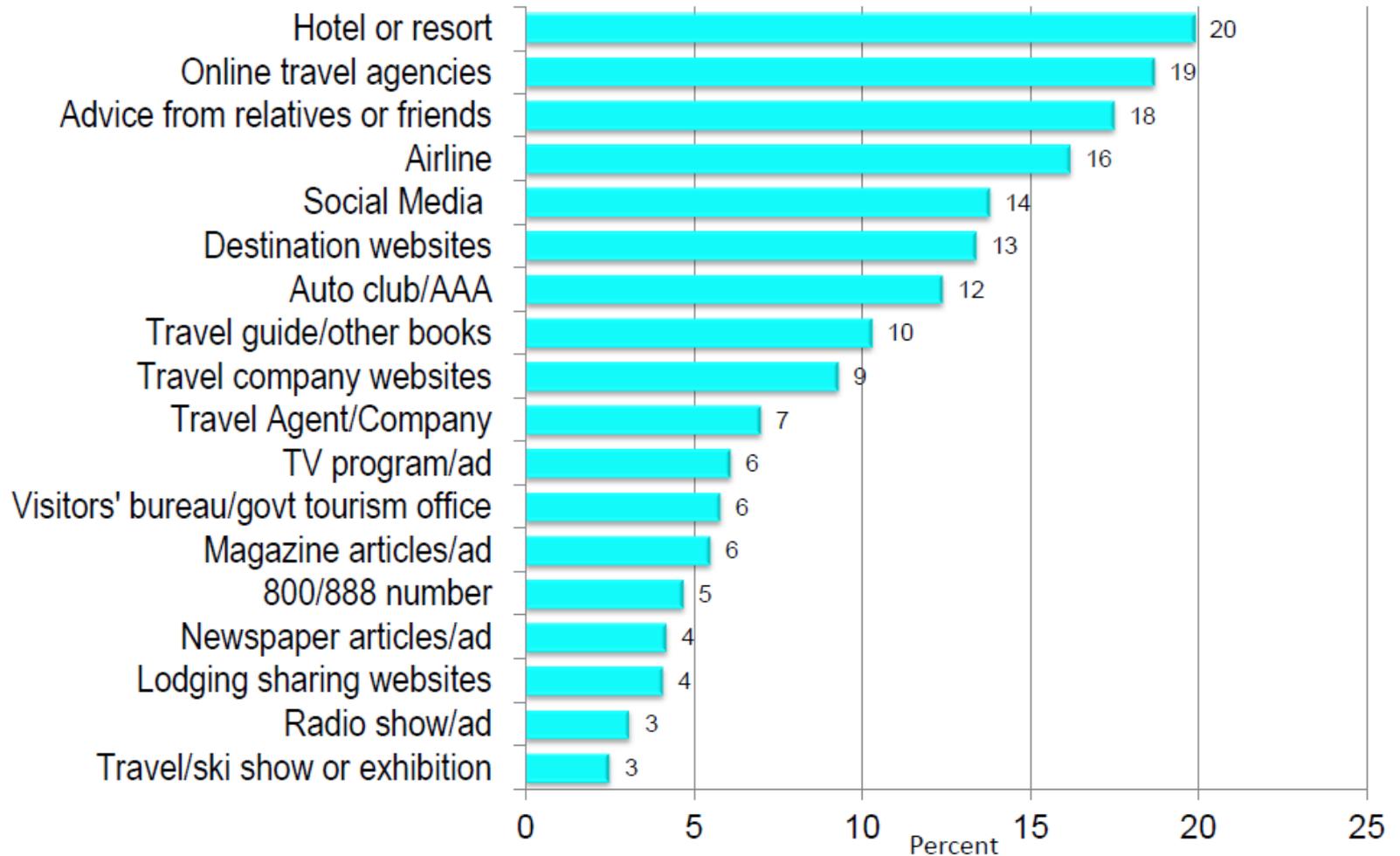
Have you visited the North Central Region in the past year?



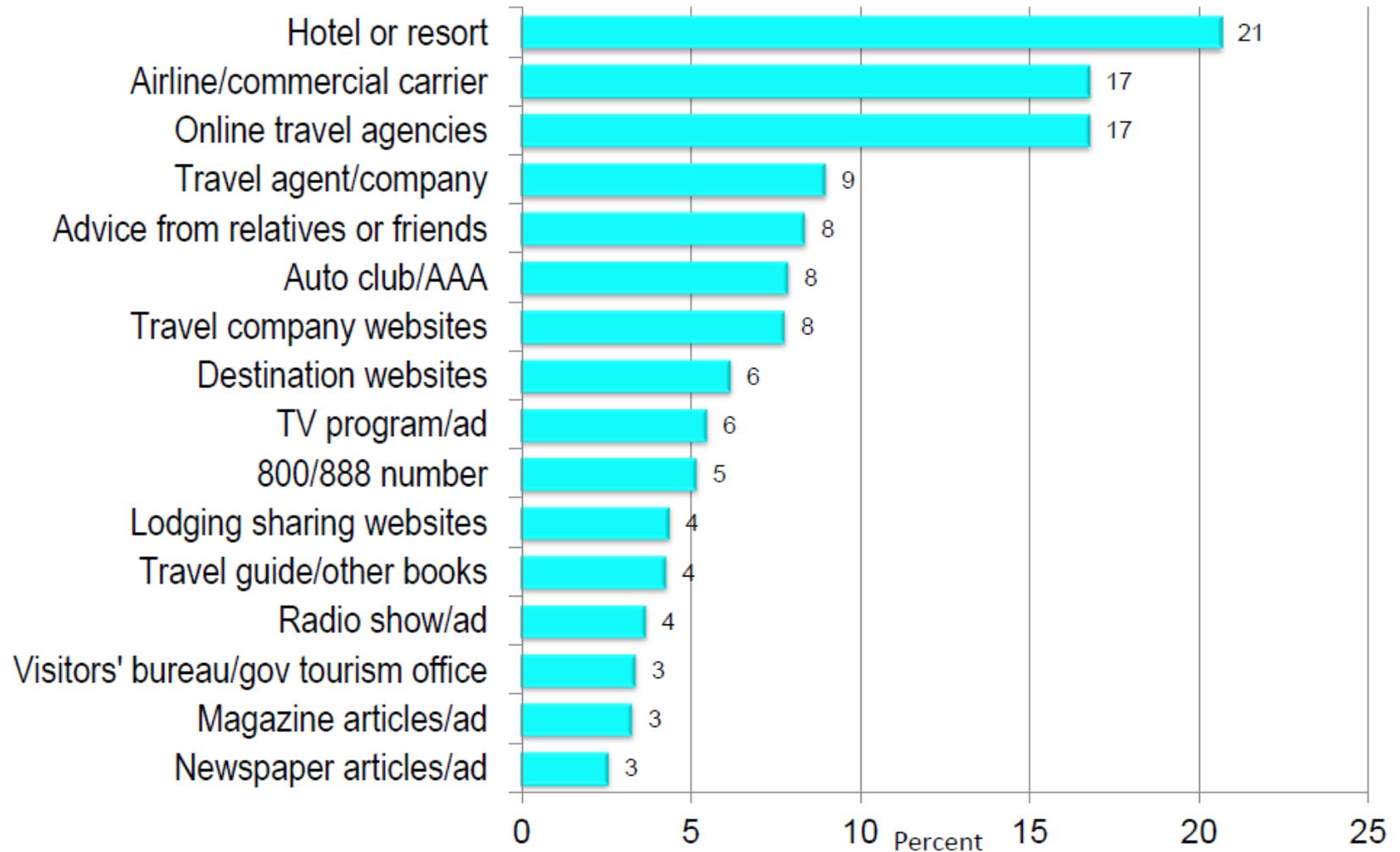
# Length of Trip Planning



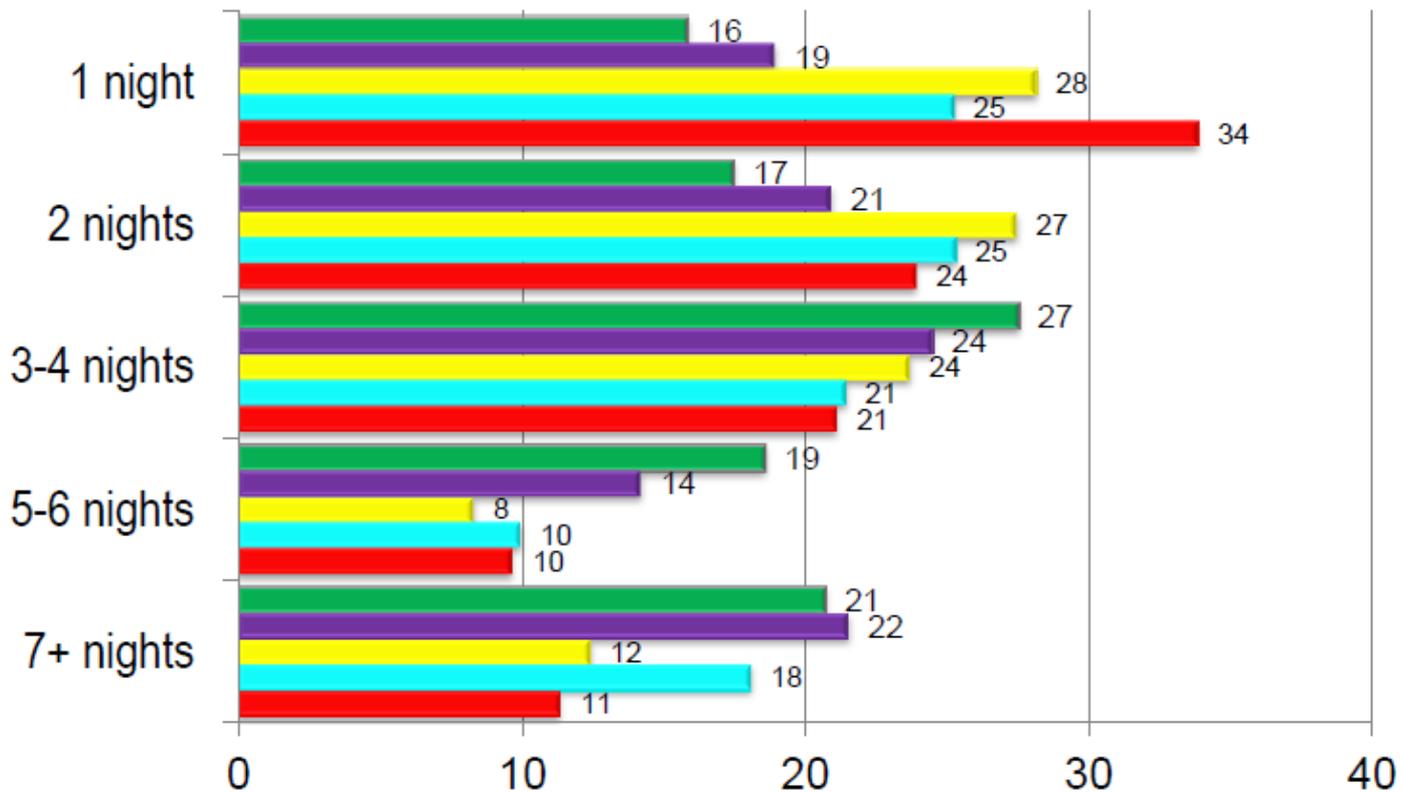
# Trip Planning Information Sources



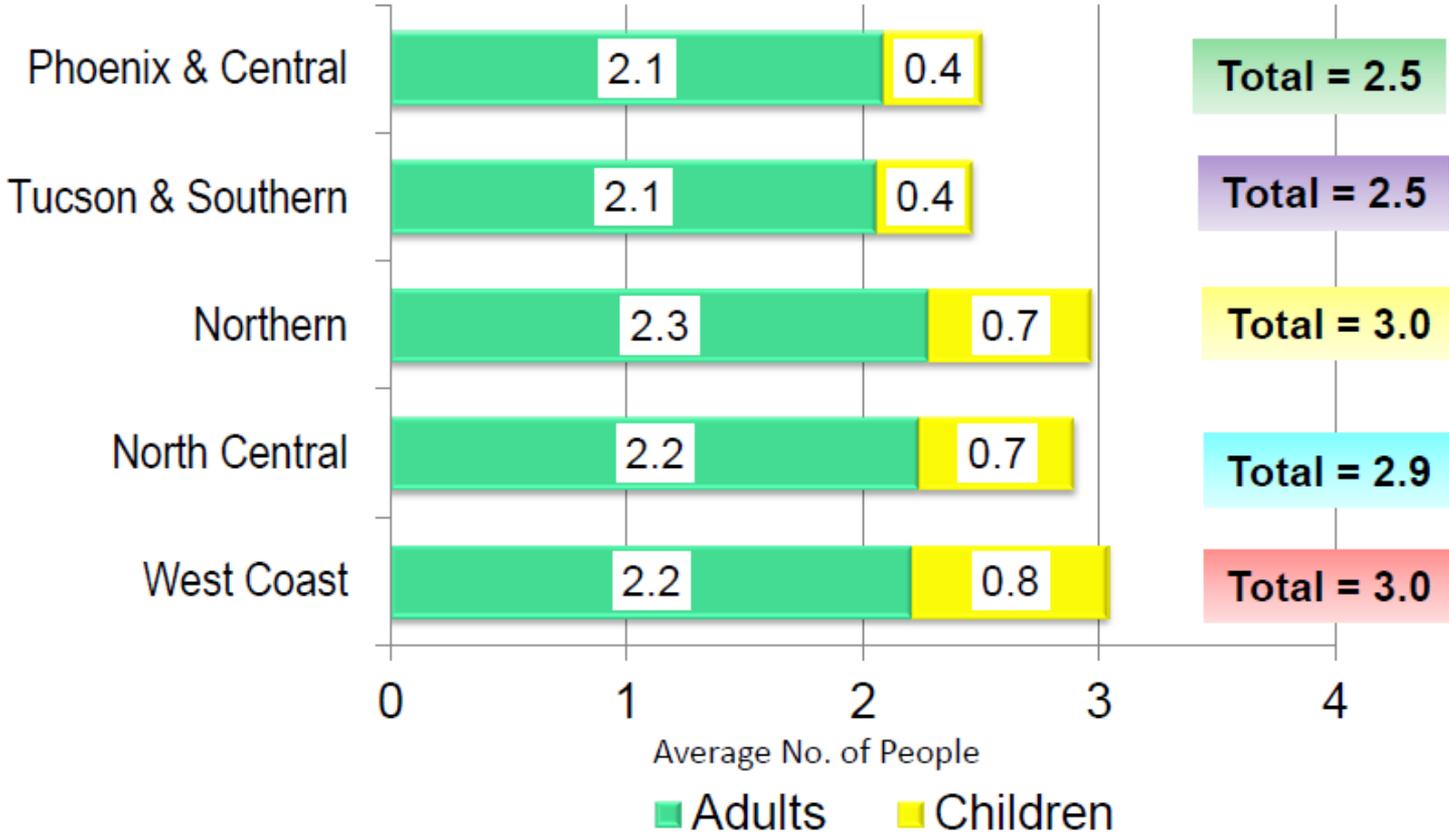
# Method of Booking Trip



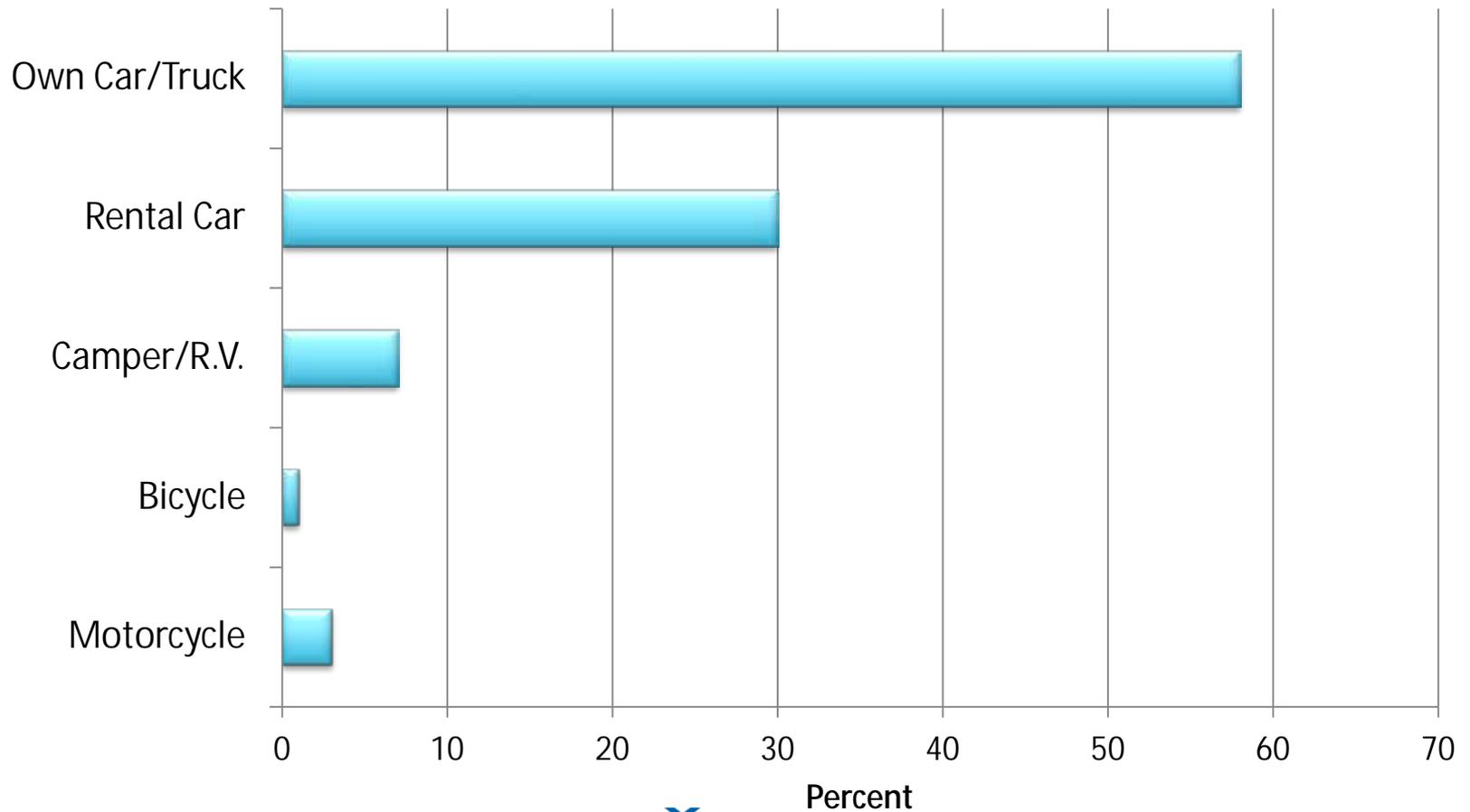
# Number of Nights Spent in Region



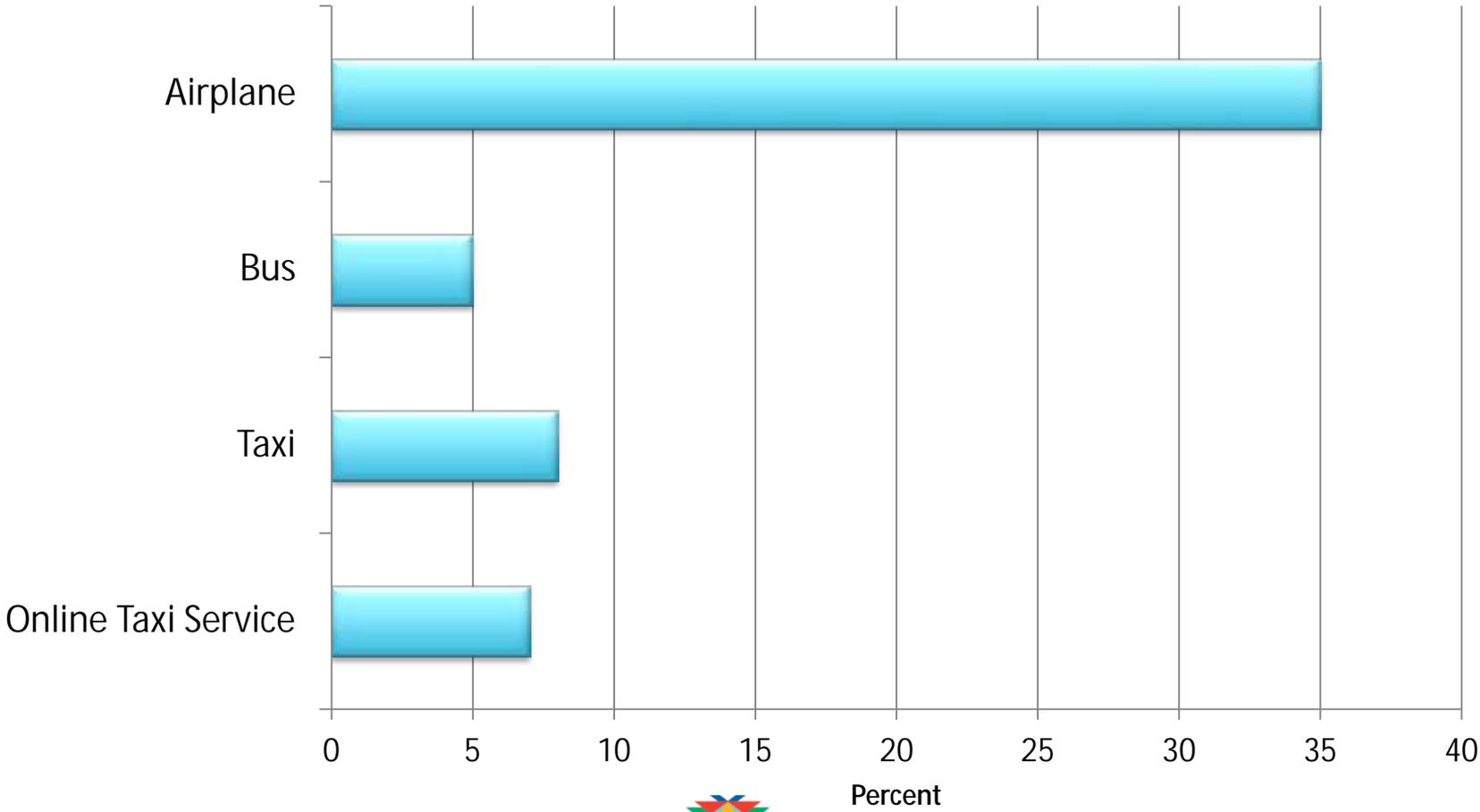
# Travel Party



# Transportation – Personal Vehicles

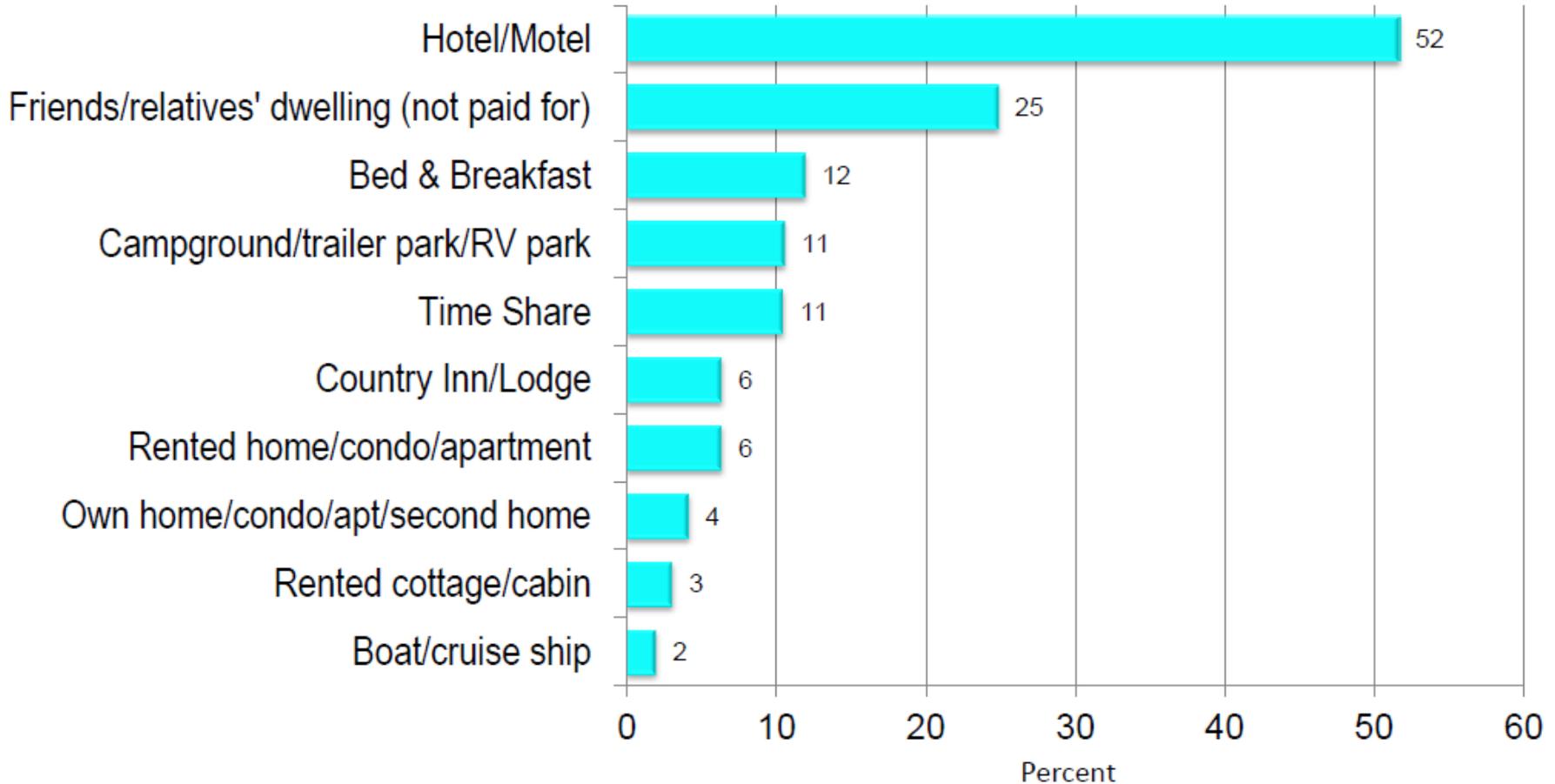


# Transportation – Commercial Vehicles

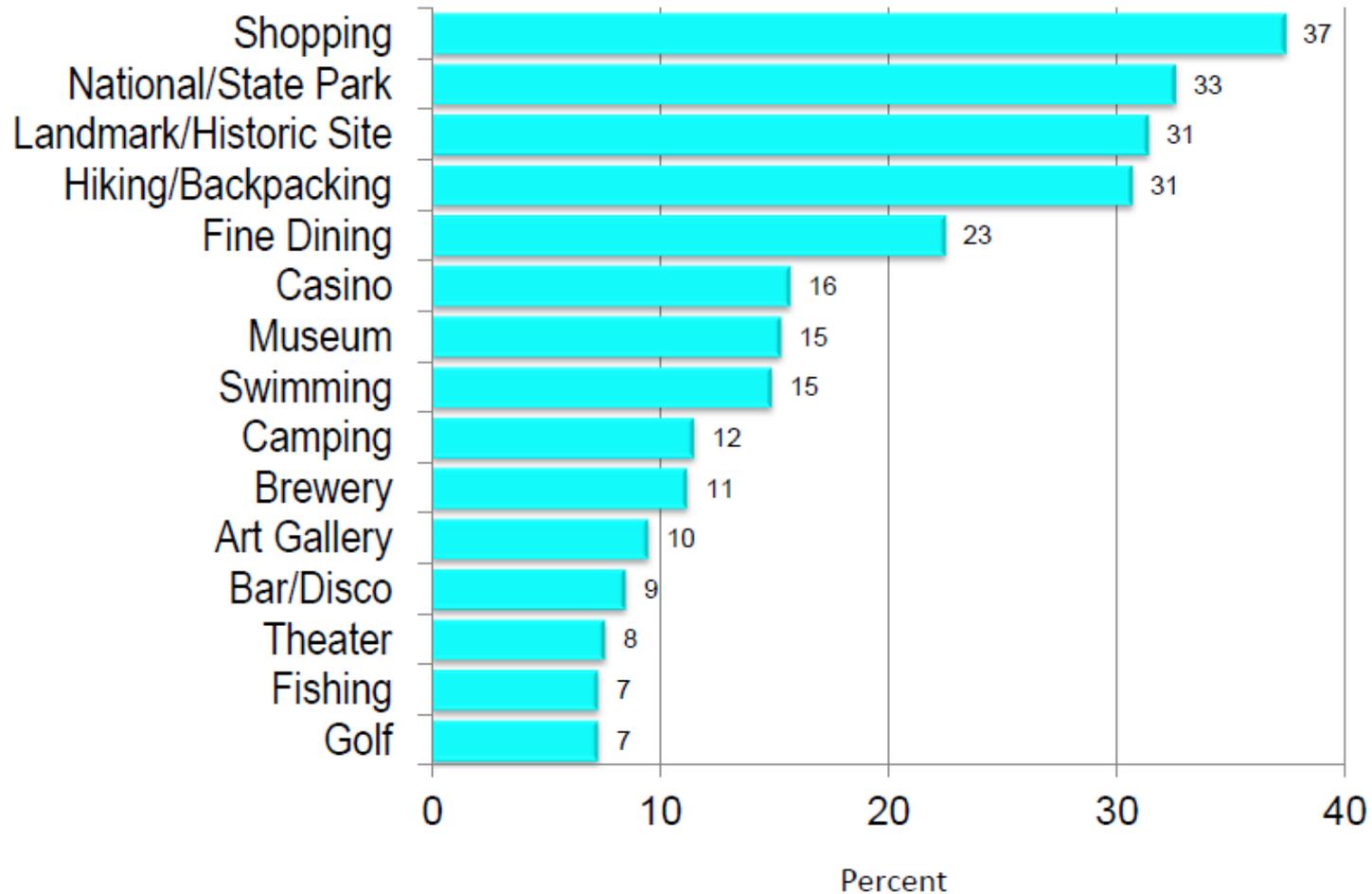


Source: Longwoods International

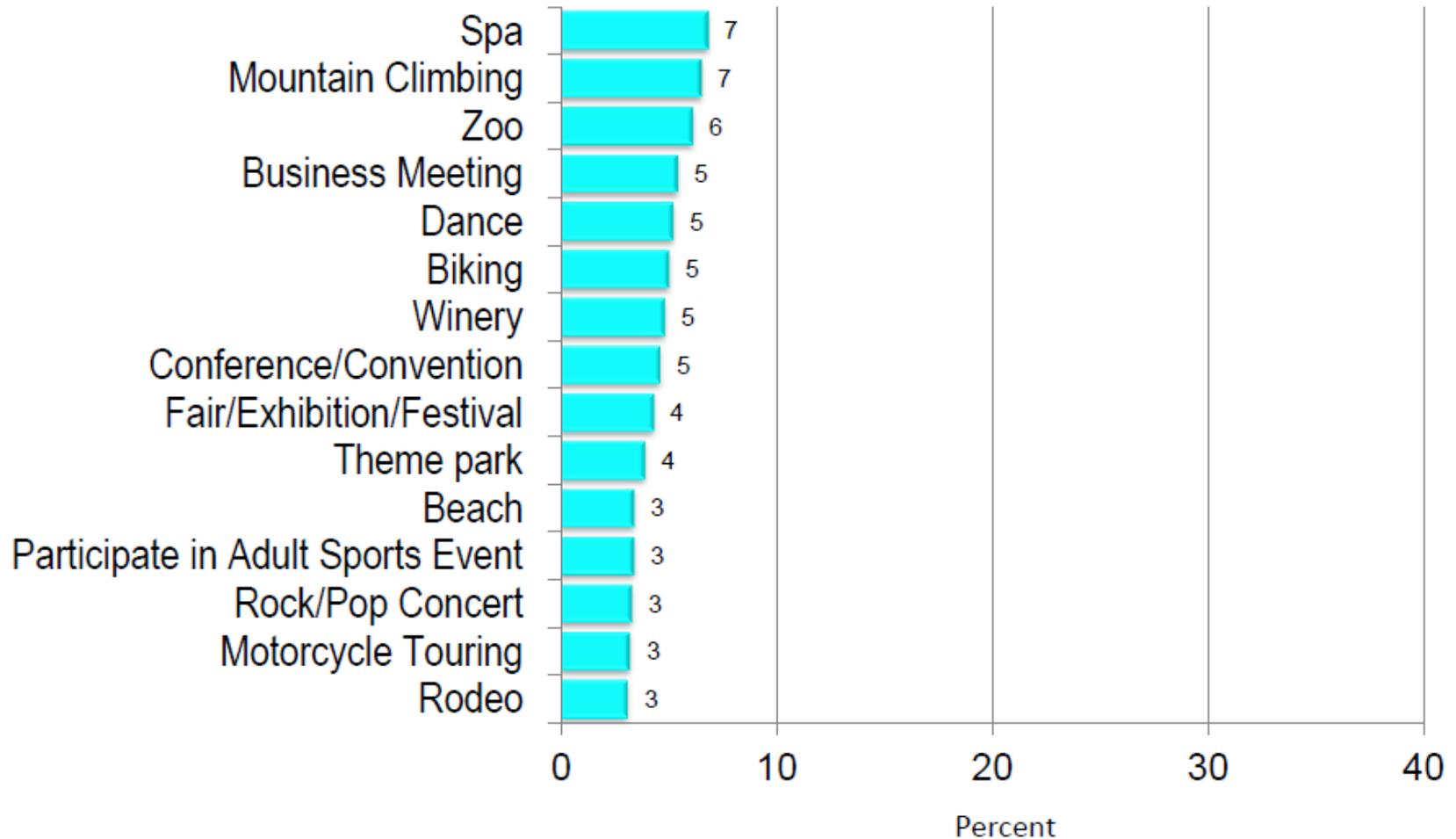
# Accommodation



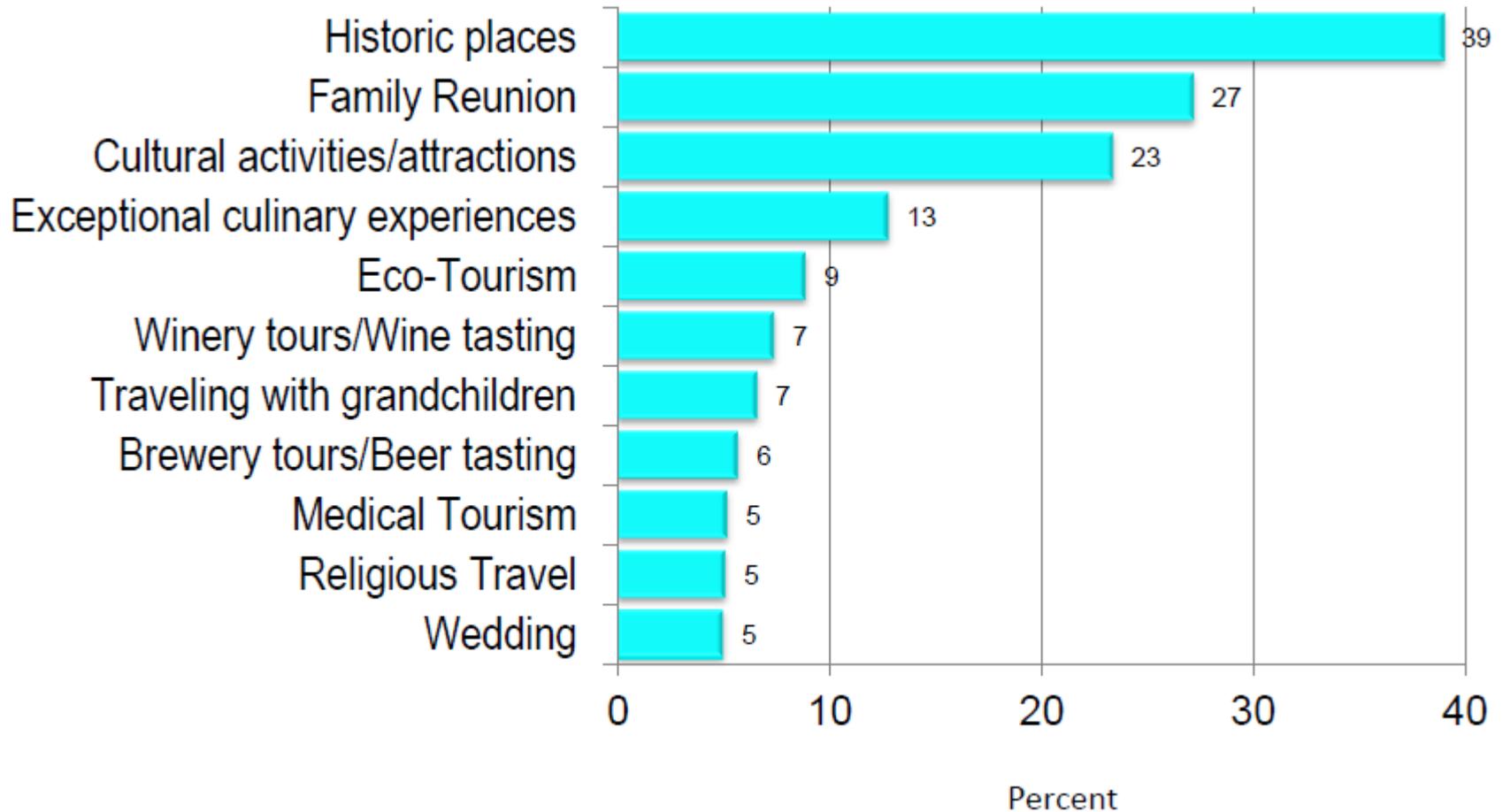
# Activities and Experiences



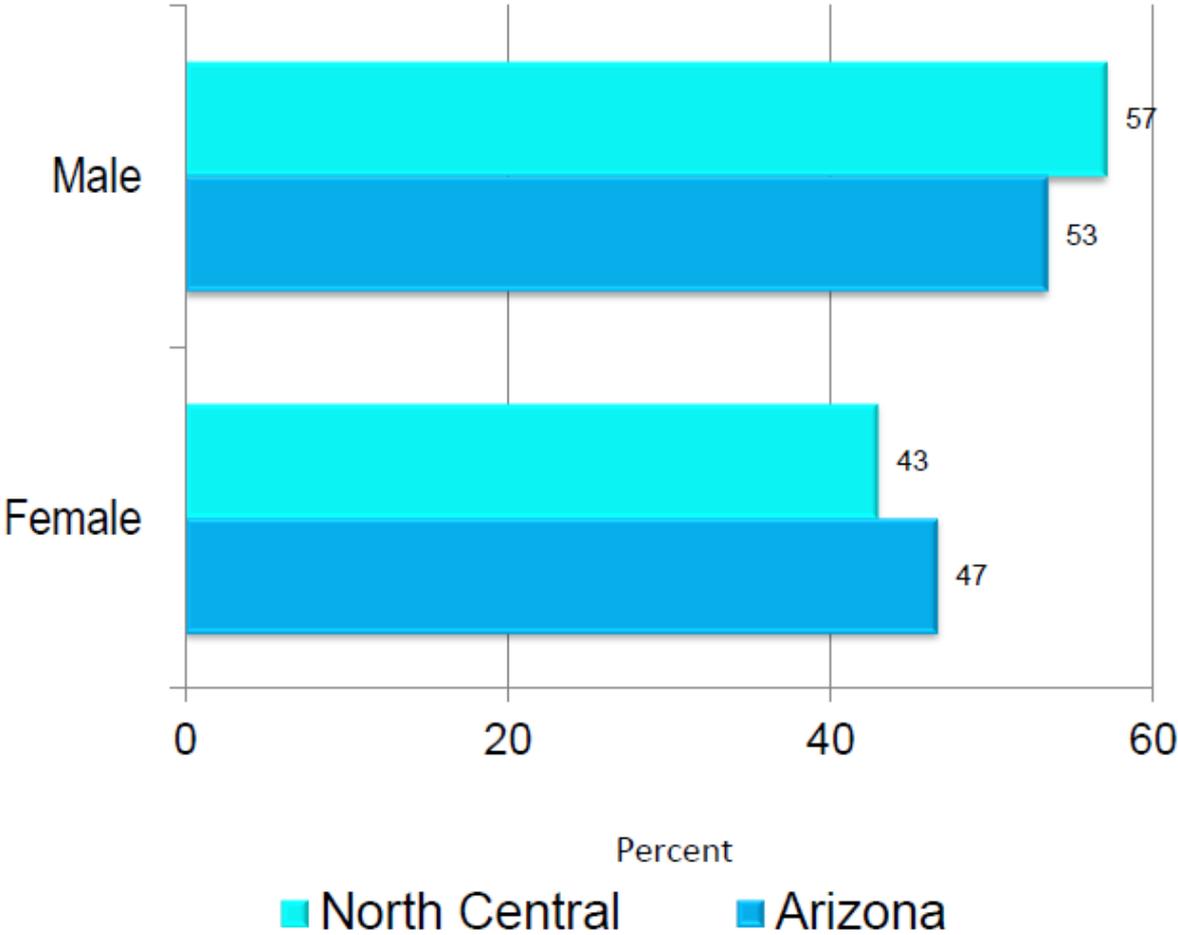
# Activities and Experiences (cont.)



# Activities of Special Interest



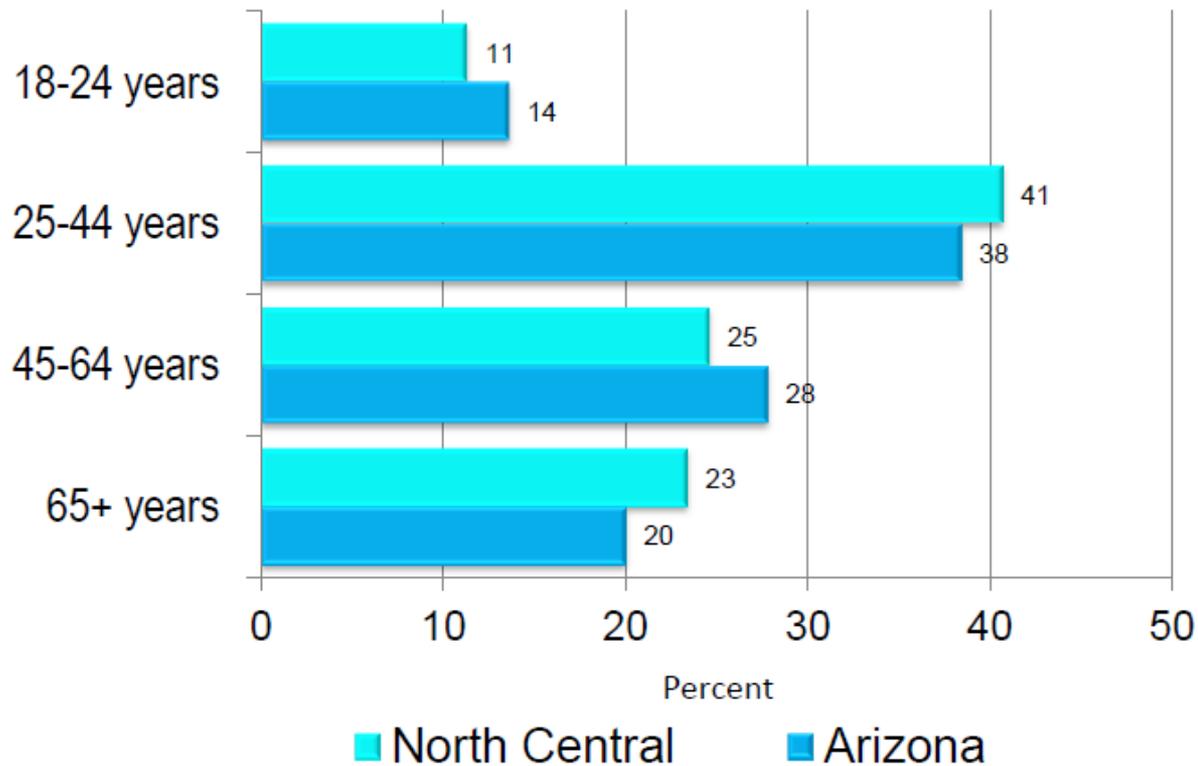
# Gender



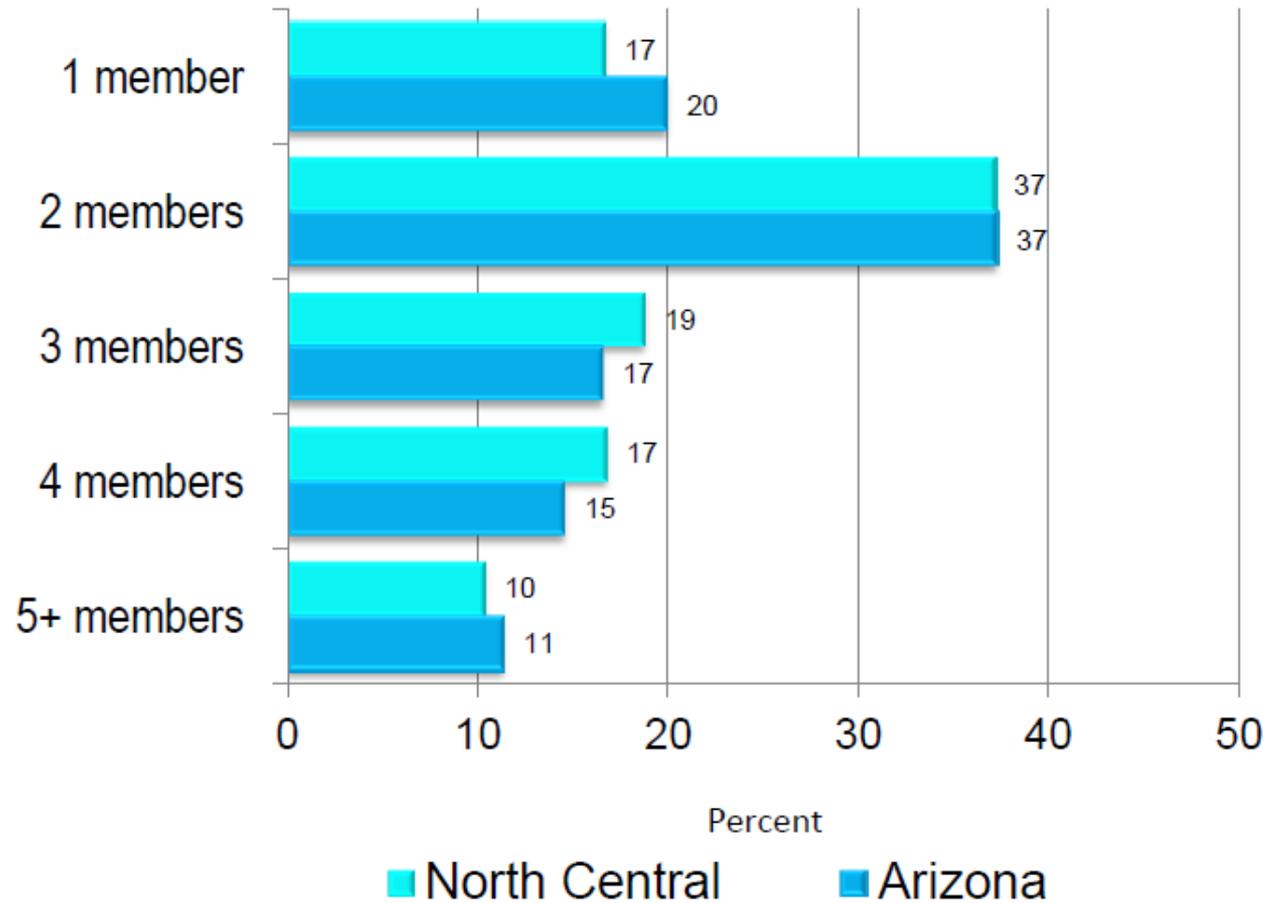
# Age

Average Age  
North Central  
= 46

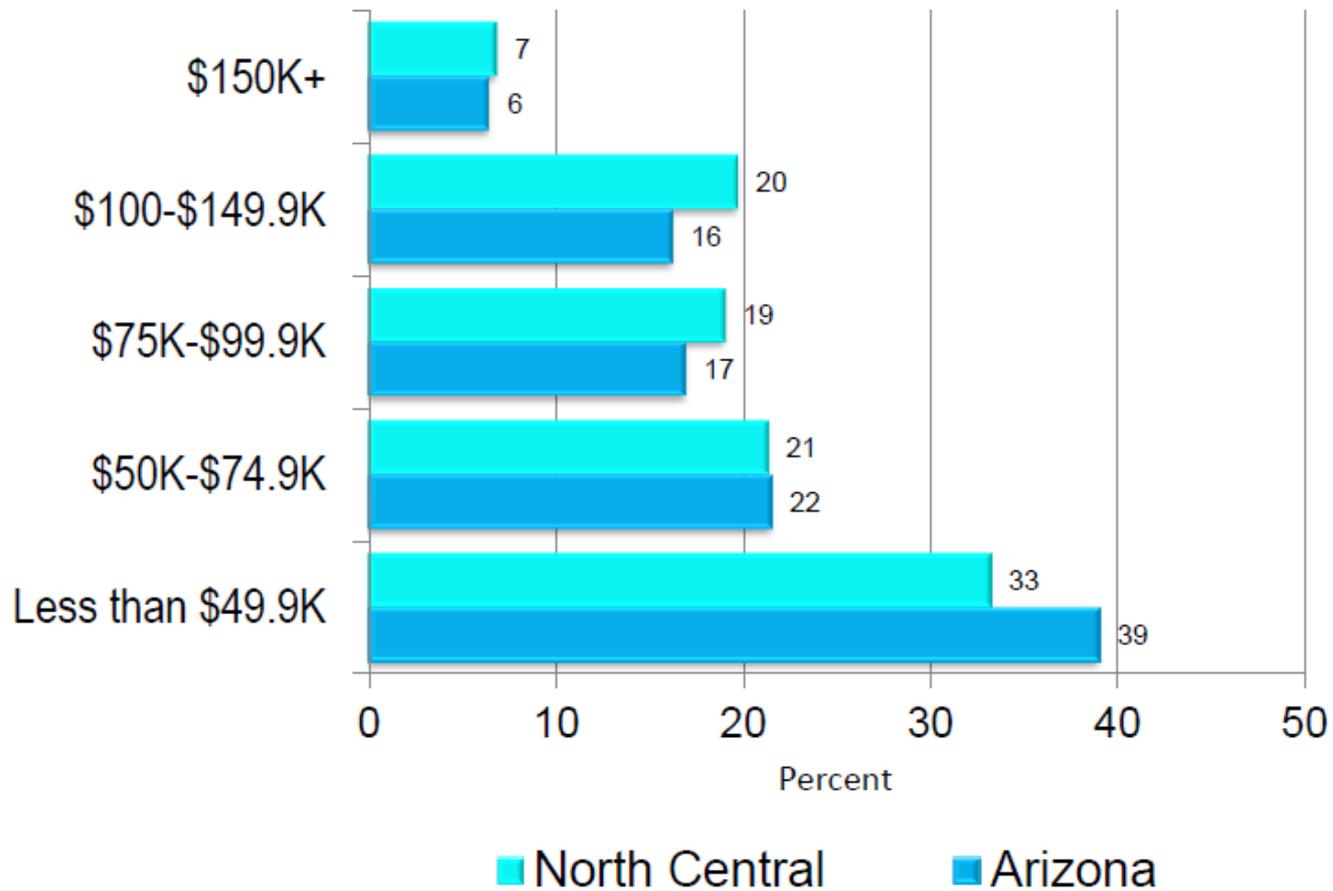
Average Age  
Arizona  
= 45



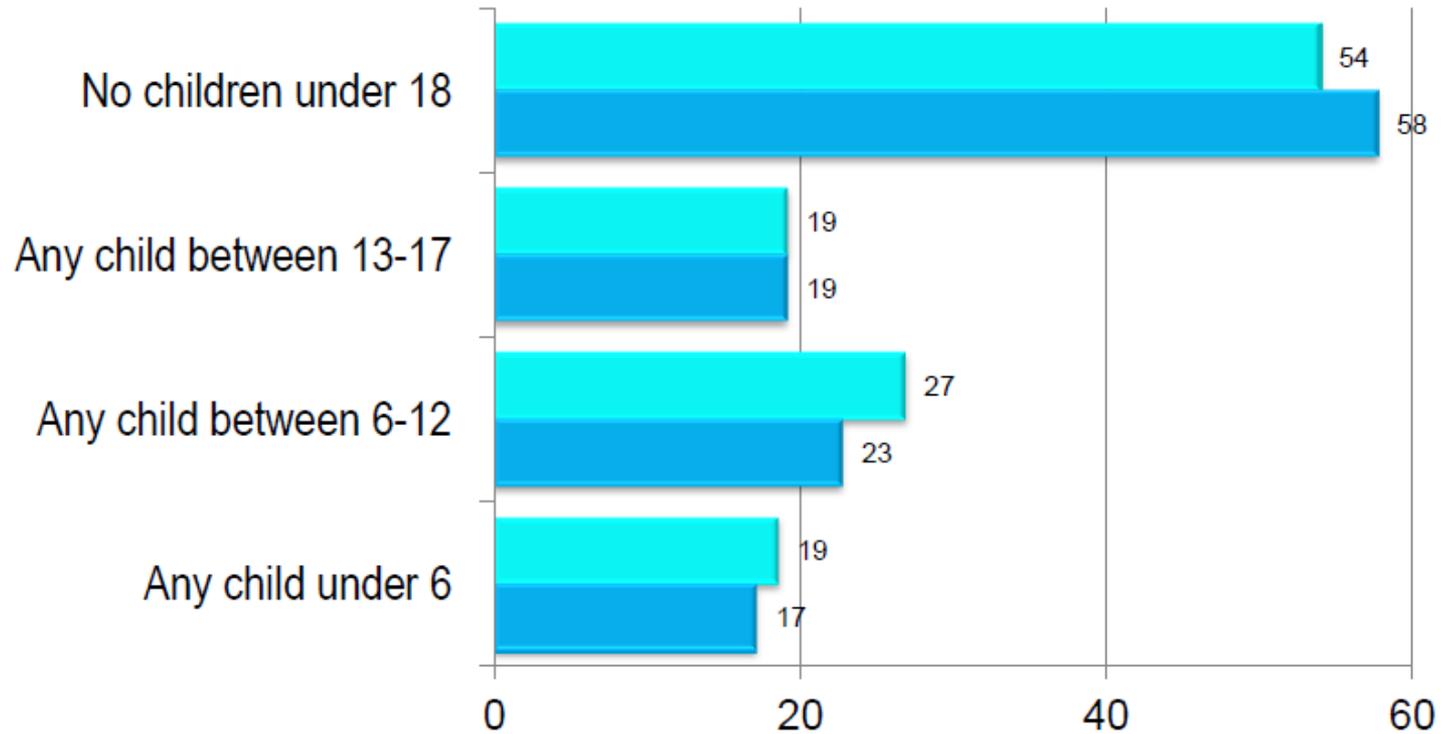
# Household Size



# Household Income



# Children in Household



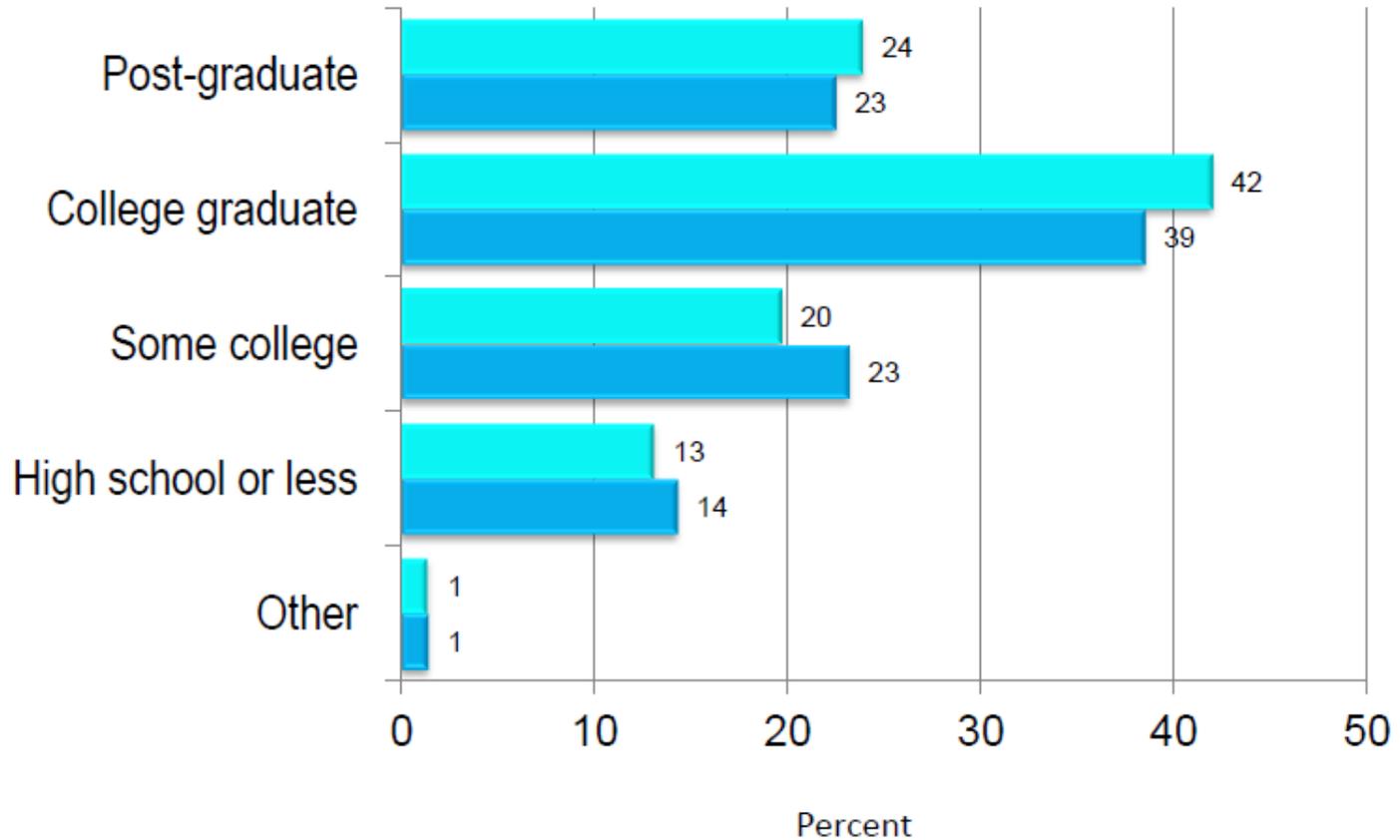
Percent

North Central

Arizona



# Education

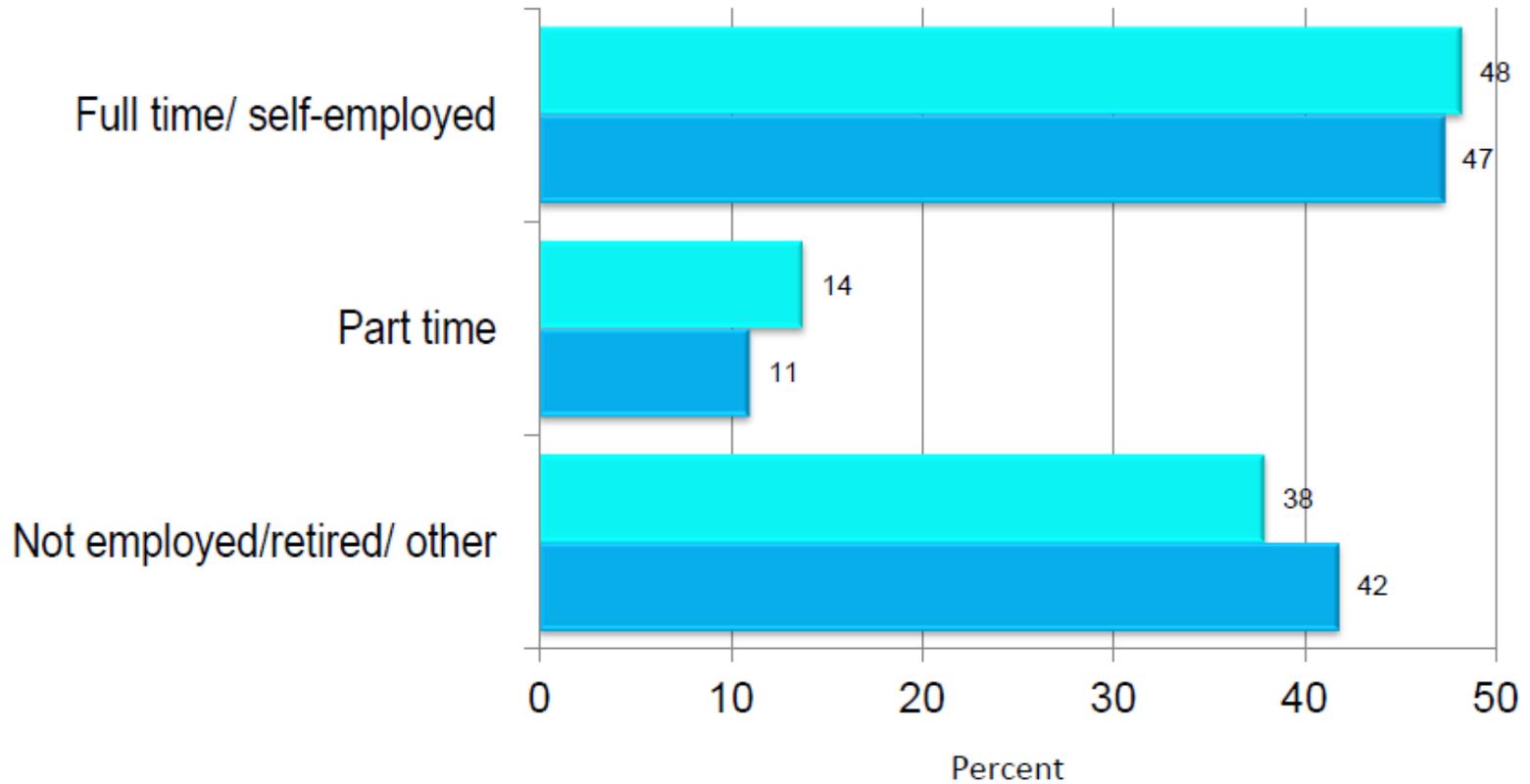


■ North Central

■ Arizona



# Employment



■ North Central      ■ Arizona

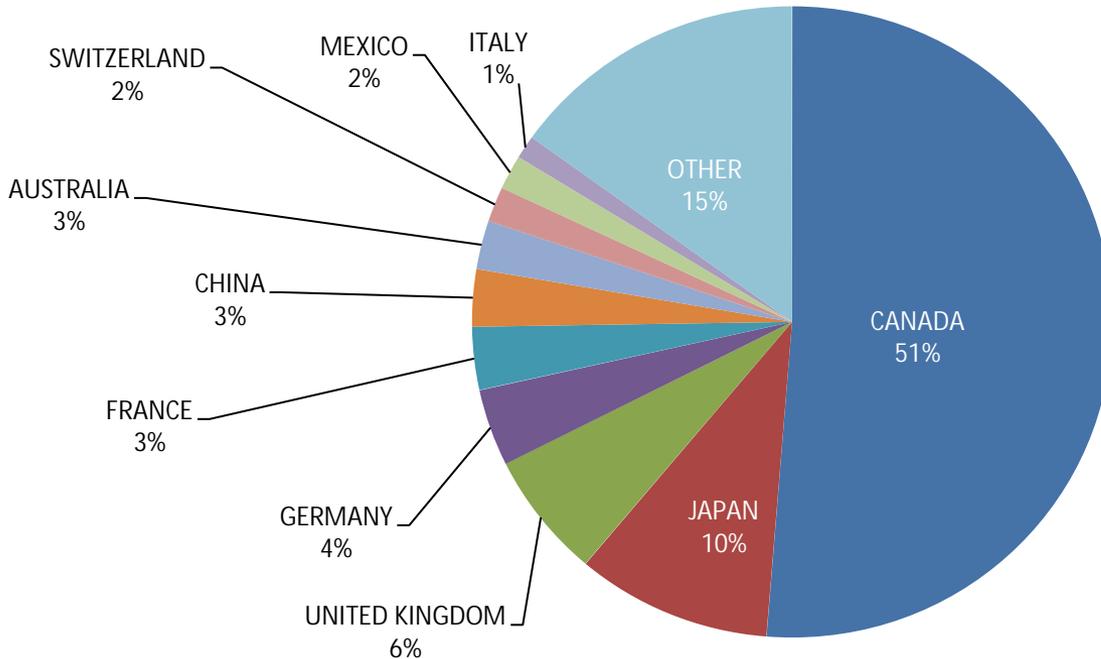


---

# INTERNATIONAL VISA CARD SPENDING

North Central Region

# 2015 Regional Visa Spending by Country

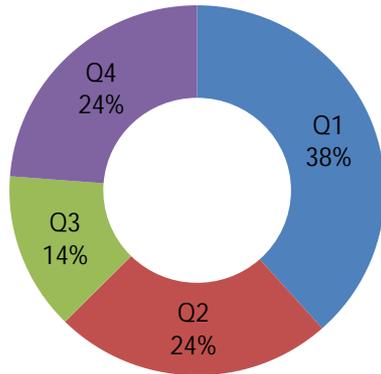


	North Central	
1	CANADA	51.3%
2	JAPAN	9.9%
3	UNITED KINGDOM	6.4%
4	GERMANY	3.9%
5	FRANCE	3.2%
6	CHINA	2.9%
7	AUSTRALIA	2.5%
8	SWITZERLAND	1.8%
9	MEXICO	1.8%
10	ITALY	1.2%
	OTHER	15.1%

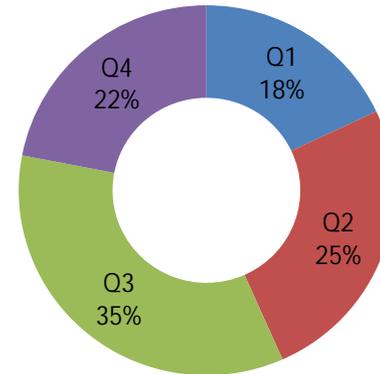


# 2015 Regional Visa Spending by Calendar Quarter

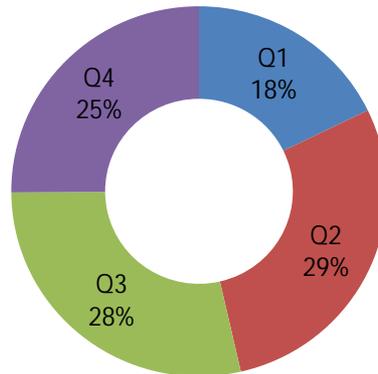
Canada



Japan

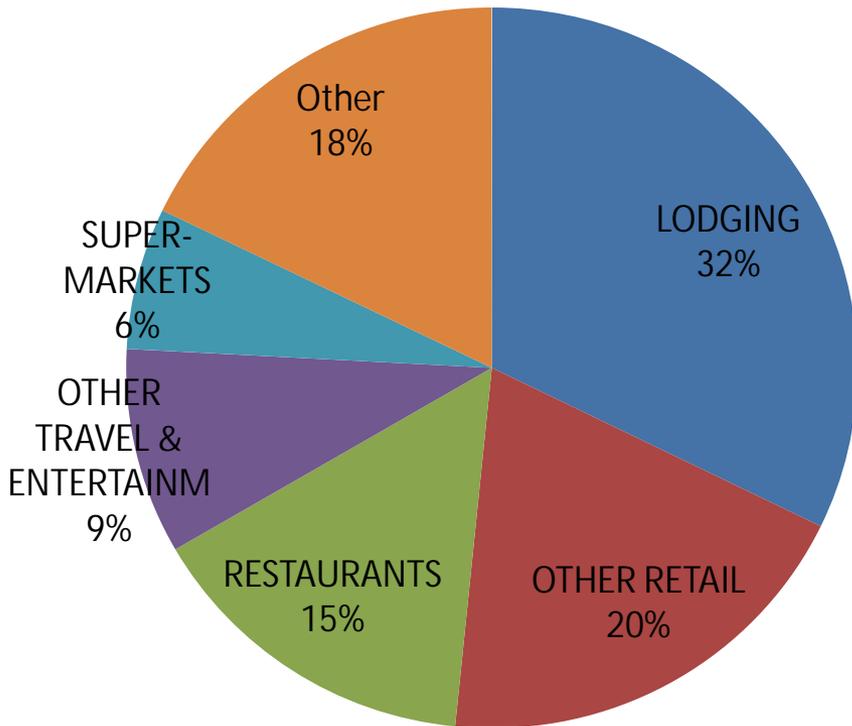


United Kingdom

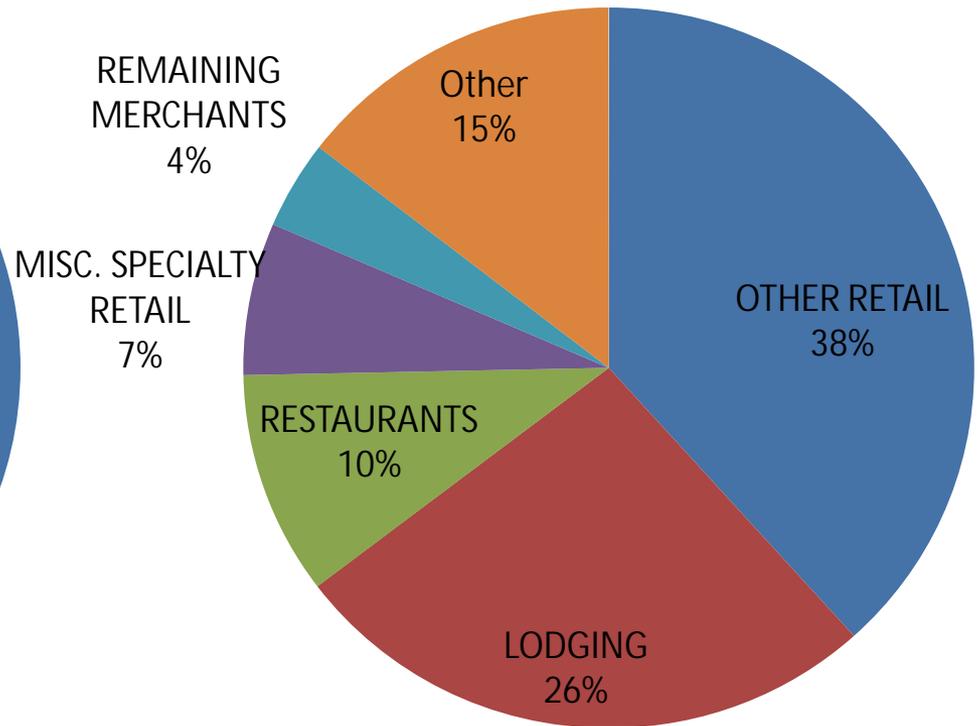


# 2015 Visa Spending by Merchant Category

Canada



Japan



# 2015 Visa Spending Trends by Country

## % Change in Spending YOY

Country	North Central	Arizona
CANADA	-8.50%	-15.70%
JAPAN	5.70%	-1.30%
UNITED KINGDOM	-6.60%	-2.20%
GERMANY	-14.20%	-15.60%
FRANCE	3.00%	-17.60%
CHINA	23.40%	34.80%
AUSTRALIA	-13.40%	-5.40%
SWITZERLAND	-3.80%	-0.80%
MEXICO	-14.40%	-22.60%
ITALY	-9.60%	-18.80%



---

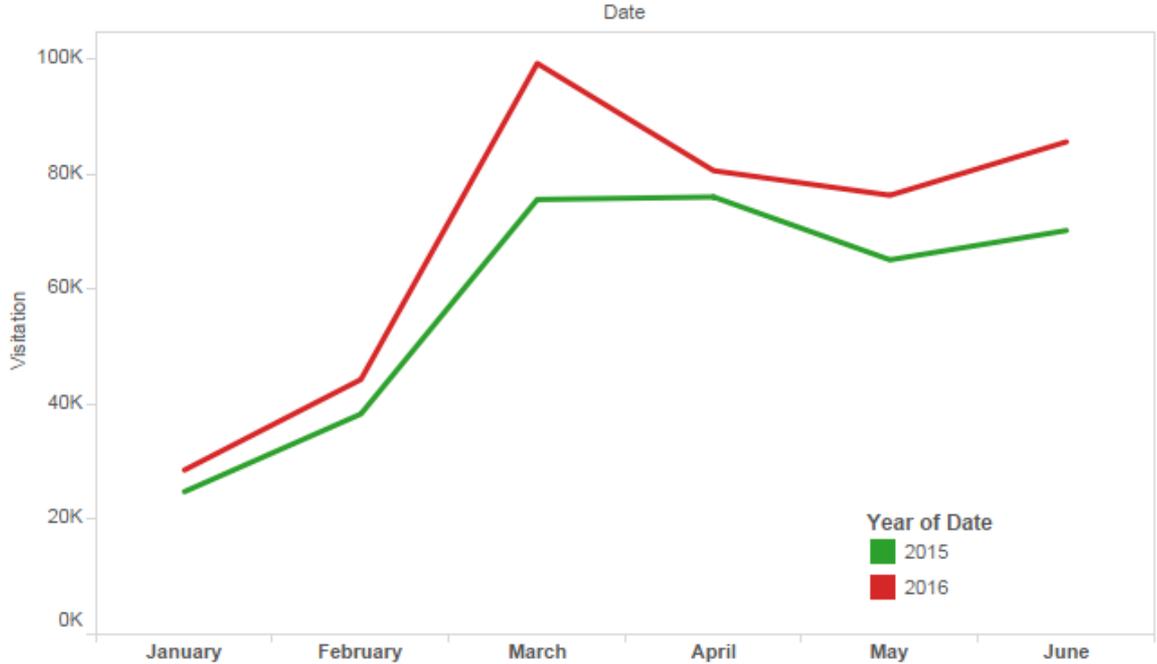
# 2016 TOURISM INDICATORS TO DATE

North Central Region

<https://tourism.az.gov/research-statistics/data-trends/research>

# State Parks Visitation

State Parks Visitation YTD YOY



Visitor Count YTD Through June

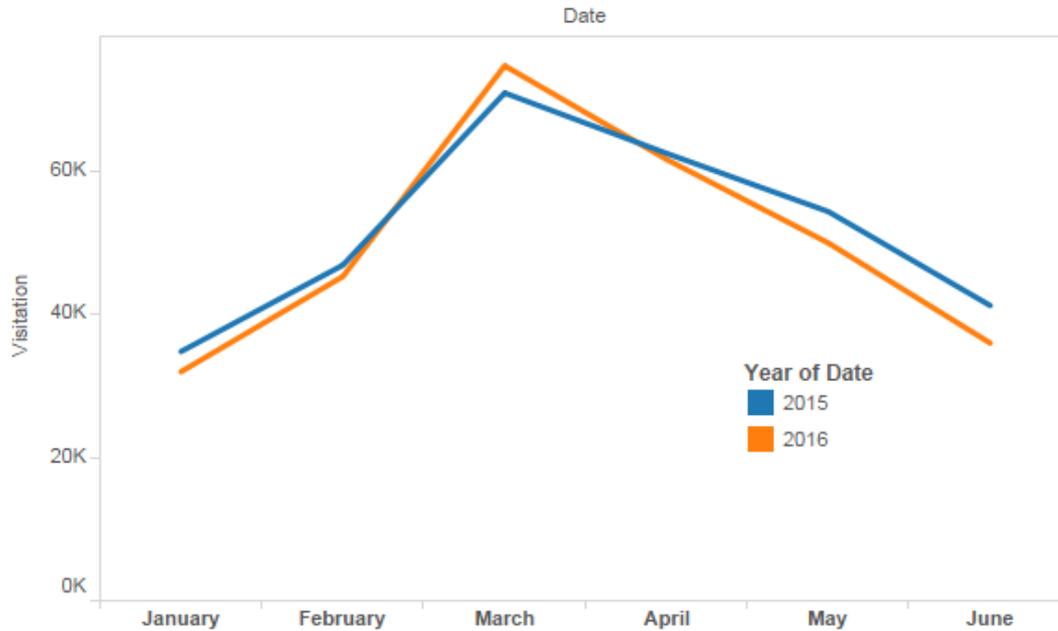
Park	Date		
	2014	2015	2016
Dead Horse Ranch SP	81,796	93,077	91,875
Fort Verde SHP	6,735	7,377	5,619
Jerome SHP	34,784	29,112	25,734
Red Rock SP	30,053	34,399	29,062
Slide Rock SP	73,326	120,995	206,045
Tonto Natural Bridge SP	51,068	65,426	56,725



Source: NAU

# National Parks Visitation

National Parks YOY



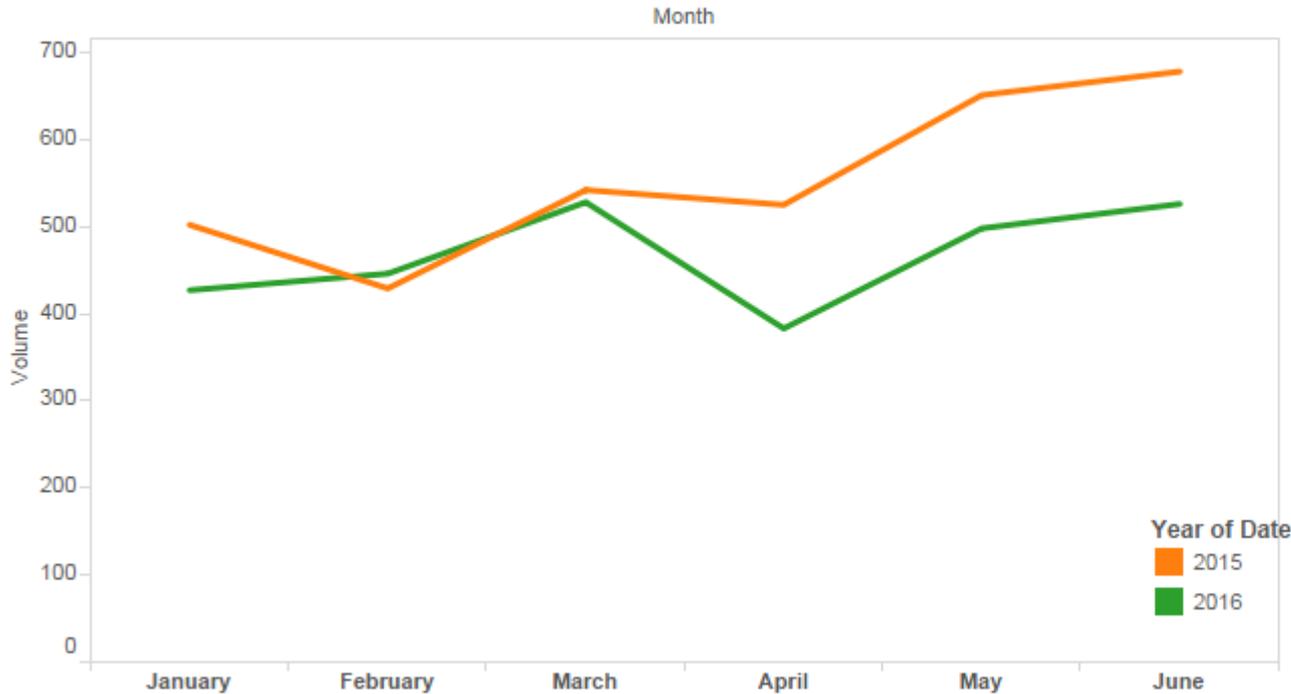
Visitation YTD through June

Park	Date	
	2015	2016
Montezuma Castle NM	233,092	213,889
Tonto NM	25,644	25,771
Tuzigoot NM	51,561	59,554



# Airport Passenger Volume

Airport Passenger Volume YOY



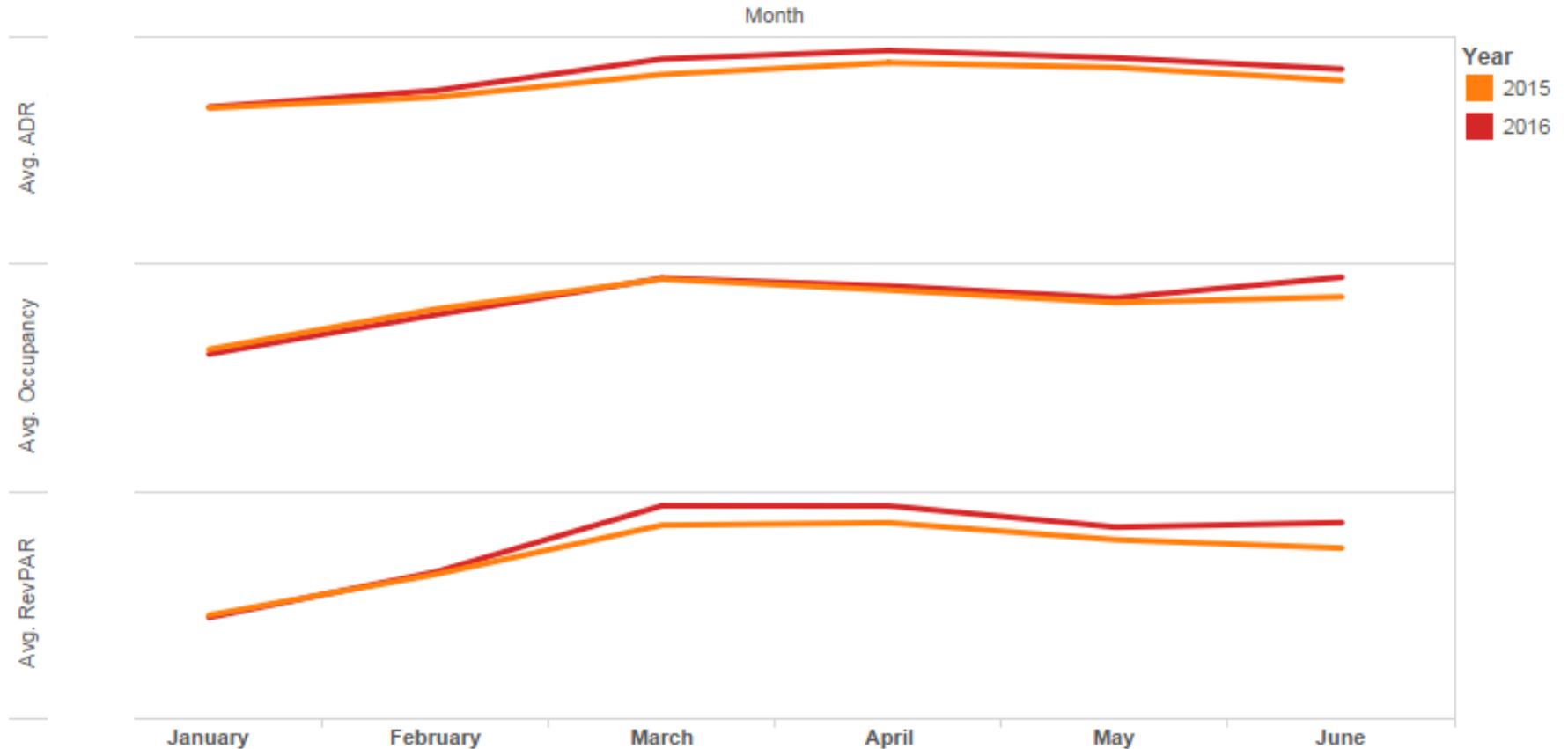
Passenger Volume YTD through June

Airport	Date	
	2015	2016
Prescott Municipal	3,327	2,808



# Lodging Indicators

## YOY Lodging Indicators - North Central Region



---

# Gross Sales by County

Arizona Hospitality Research & Resource Center, NAU

[http://franke.nau.edu/ahrrc/library/monthly\\_gross\\_sales\\_data](http://franke.nau.edu/ahrrc/library/monthly_gross_sales_data)



---

# Q&A

## North Central Region

Presentation slides available at:

<https://tourism.az.gov/research-statistics>

Colleen Floyd  
Research Manager

[cfloyd@tourism.az.gov](mailto:cfloyd@tourism.az.gov)

602-364-3716

