



Northern Region 2015 Year-End Data Review

**ARIZONA**
OFFICE OF TOURISM



AOT Research Staff



Ralph Coleman, Jr.
Director of Research

rcoleman@tourism.az.gov

602-364-4158



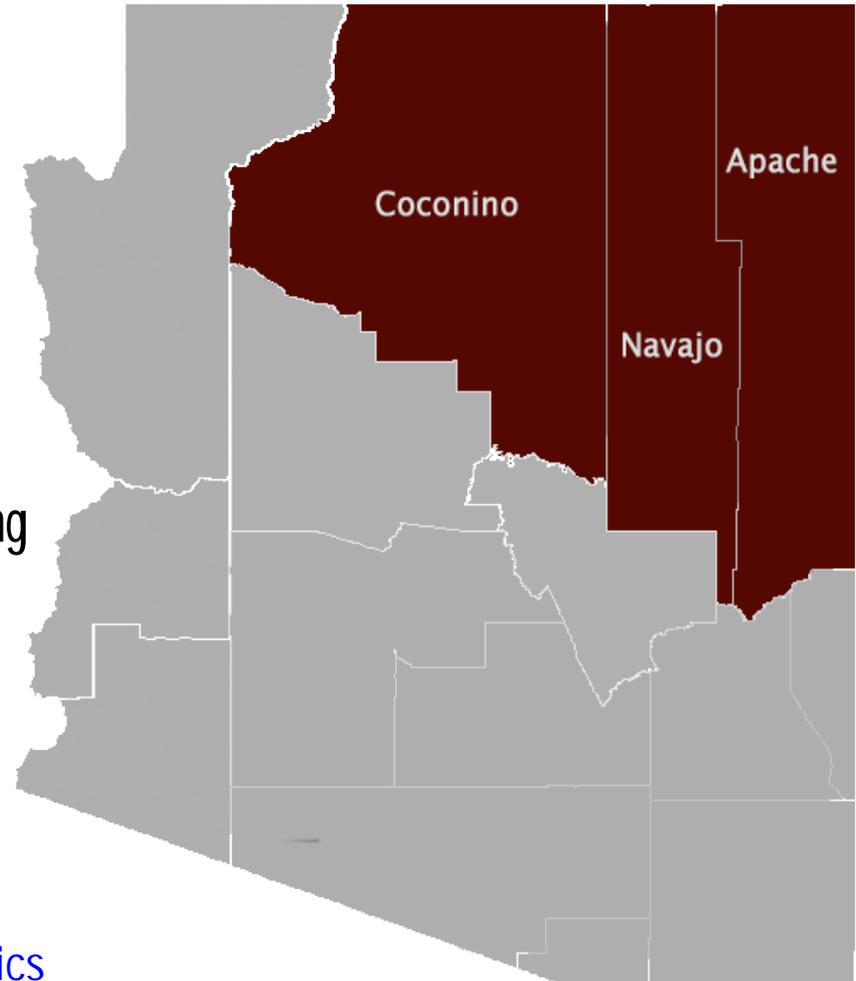
Colleen Floyd
Research Manager

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

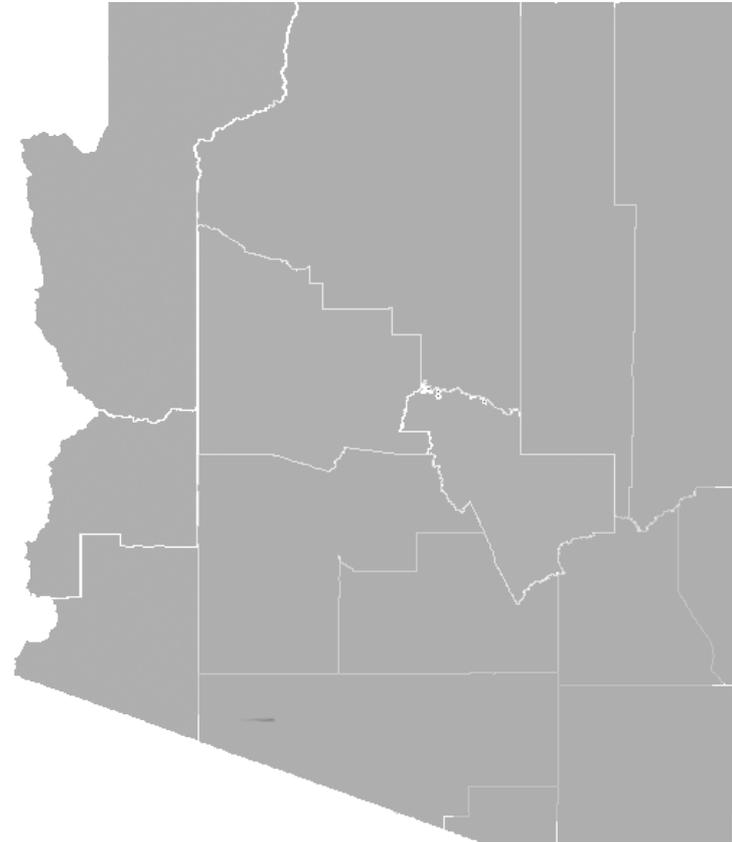
Overnight Visitors

Up 3.4% YOY

\$21.0 Billion

Direct Spending

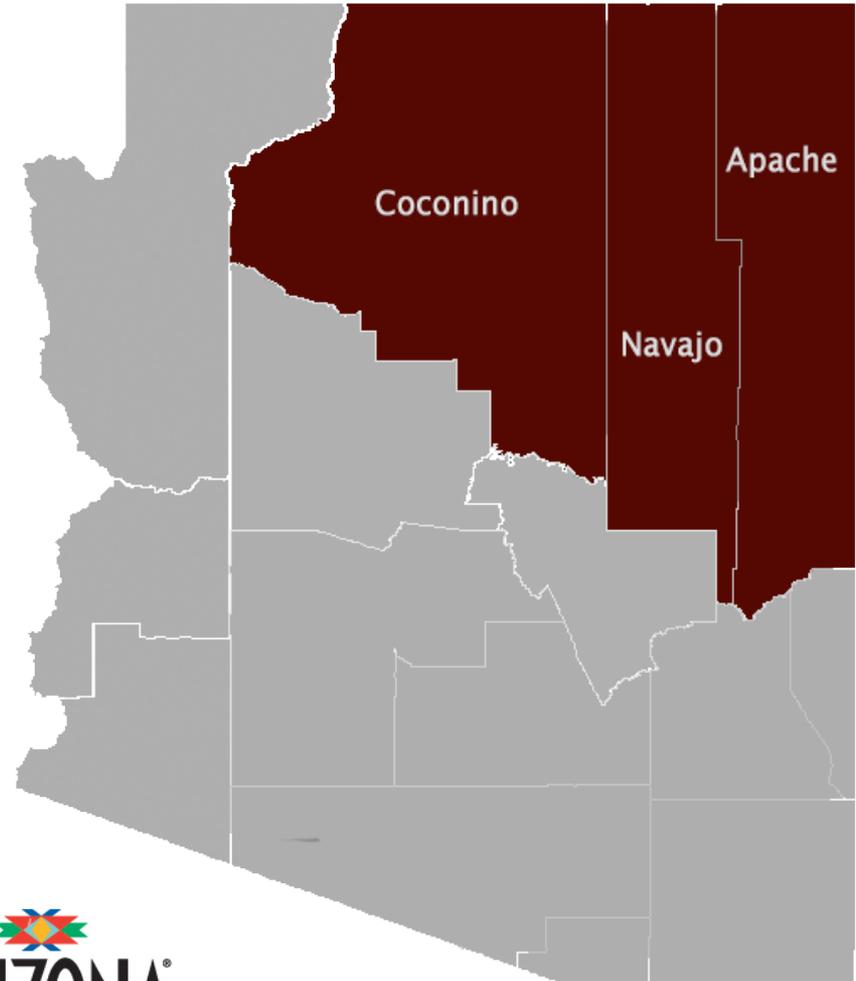
Up 1.3% YOY



2015 Northern Region Industry Performance

7.3 Million
Domestic Overnight
Visitors

\$1.65 Billion
Direct Spending



Primary Research Partners



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

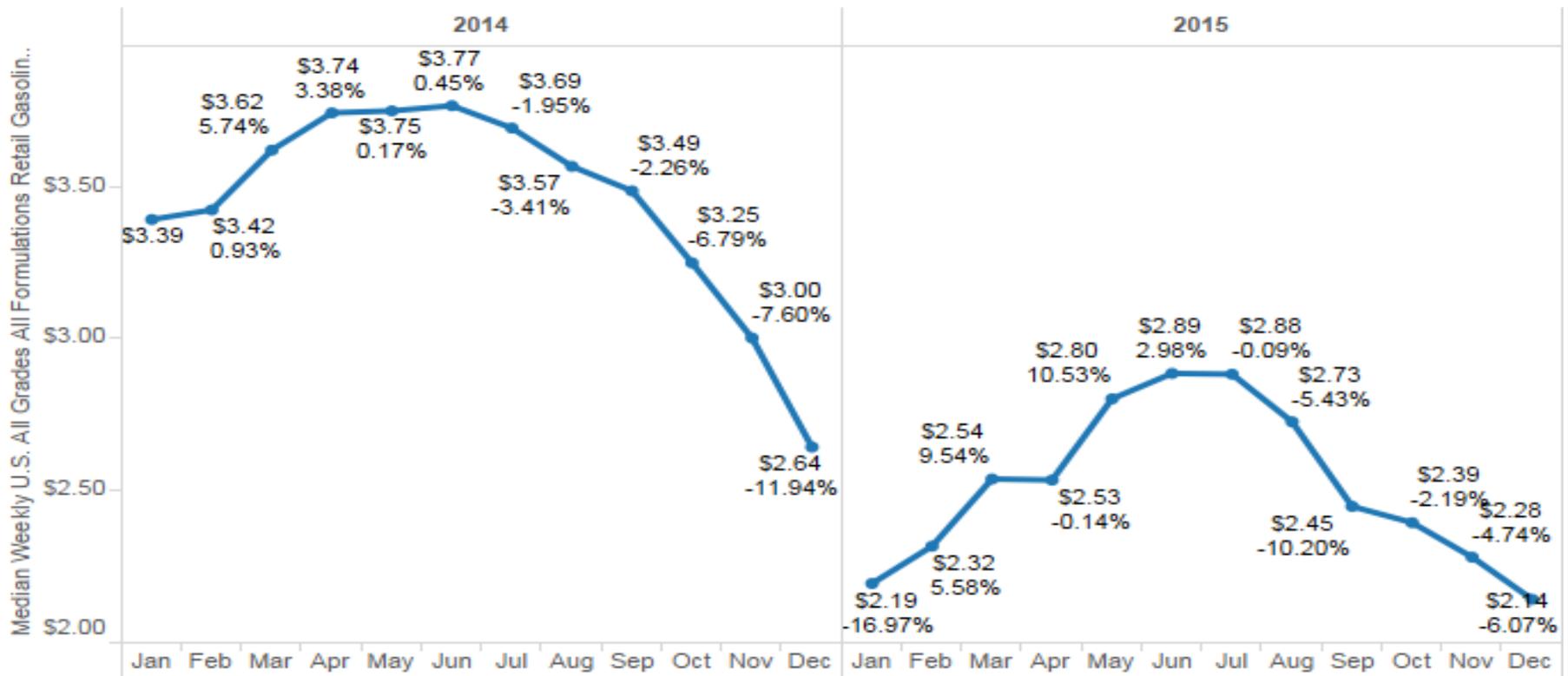
- Economic Impact of Travel
- Domestic and International Spending
- Jobs, Earnings, Taxes Generated
- Spending by Accommodation Type
- Spending by Commodity Purchased
- Regional, County, and Legislative District Data Available

ECONOMIC IMPACT OF TRAVEL 2015

Northern 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

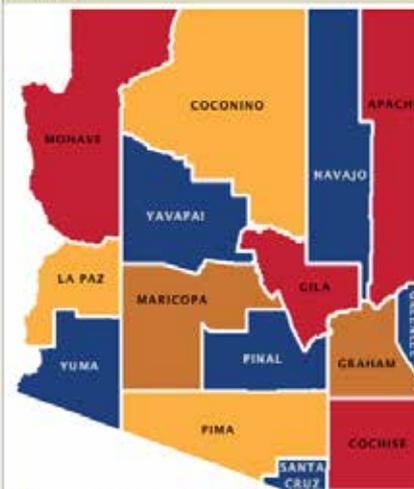
Prepared for the

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.
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Spending by Type of Accommodation

Accommodation Type	2014 Share	2015 Share
Hotel, Motel	62%	64%
Private Home	11%	10%
Campground	3%	3%
Vacation Home	6%	6%
Day Travel	17%	16%
Destination Spending	100%	100%

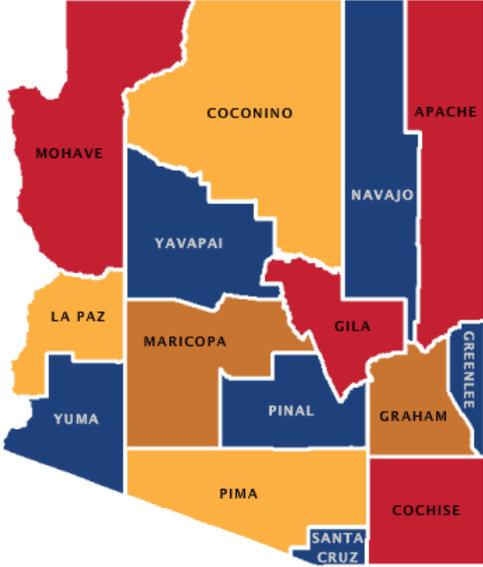


Interactive Data Tool and App

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

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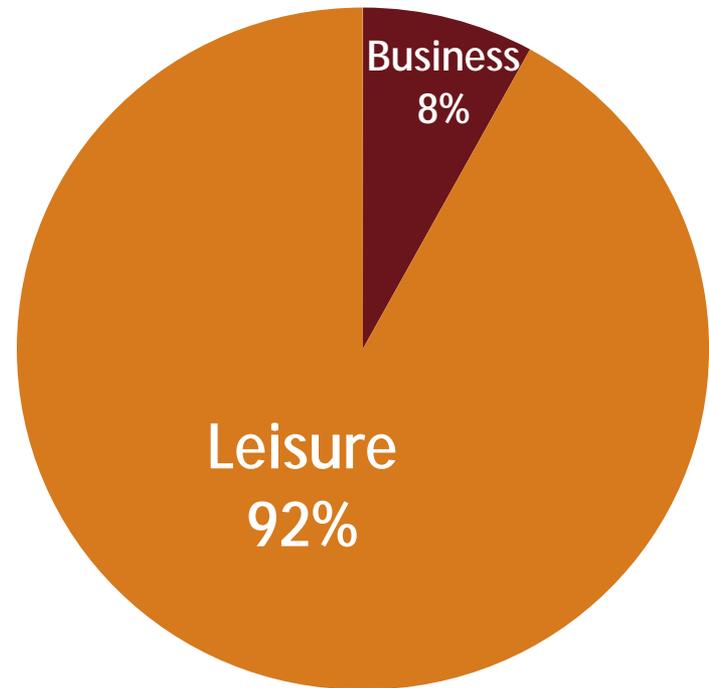
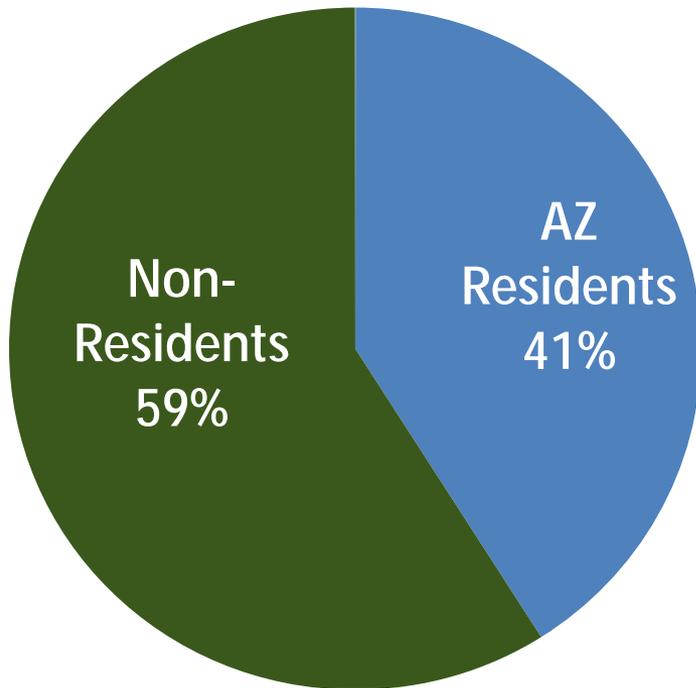
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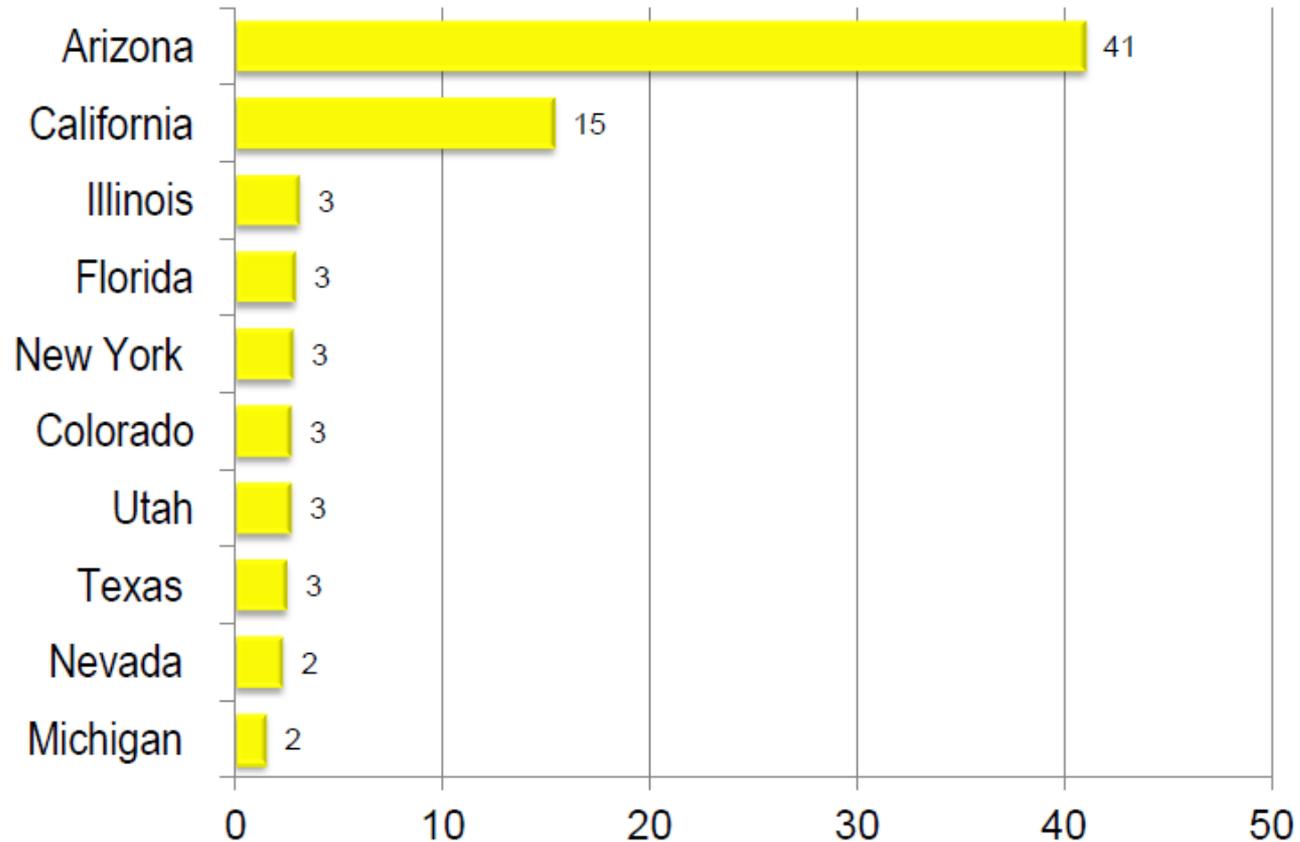
DOMESTIC OVERNIGHT VISITOR PROFILE 2015

Northern Region

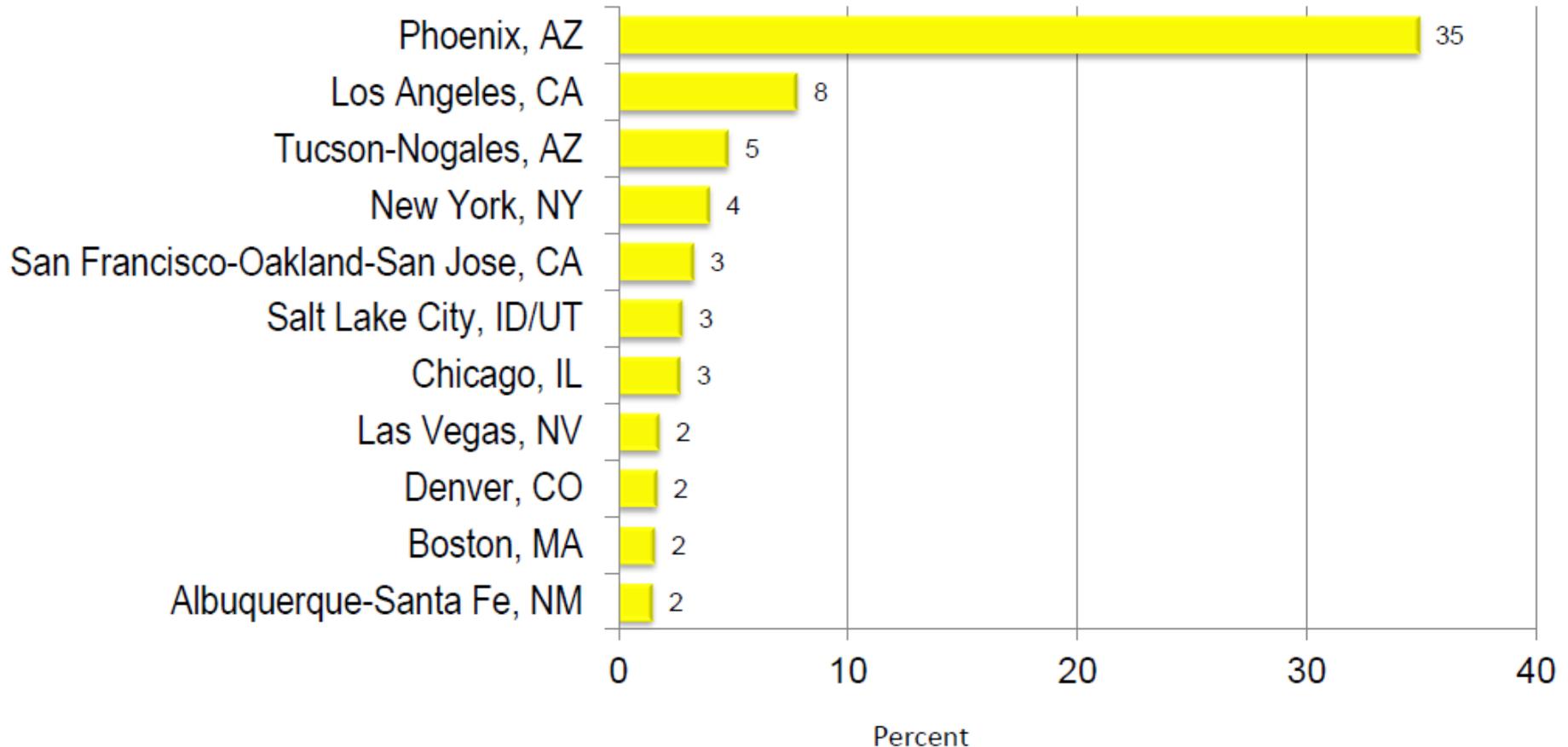
2015 NORTHERN REGION OVERNIGHT VISITOR PROFILE



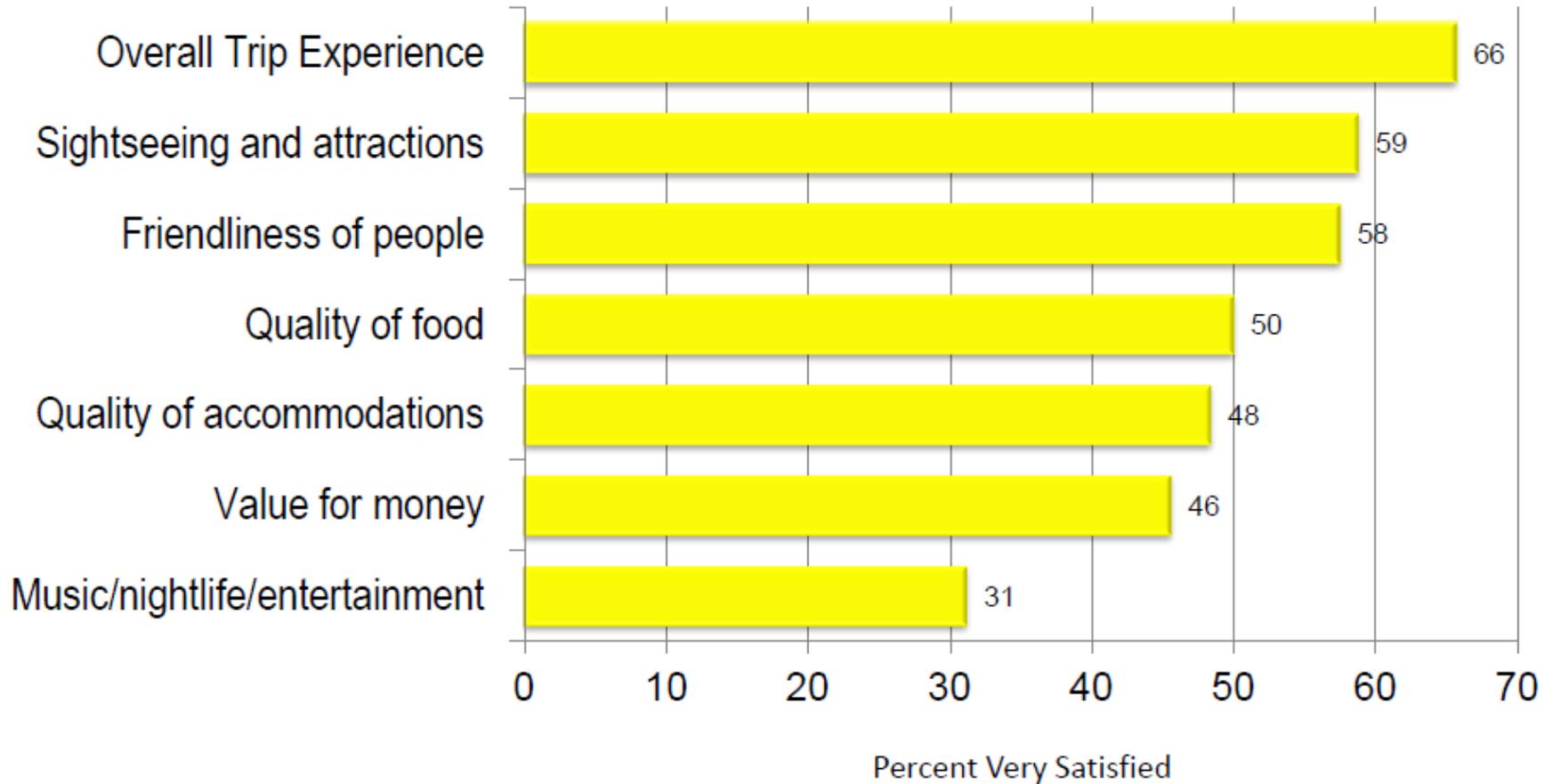
State of Origin of Overnight Trip



DMA of Origin of Overnight Trip

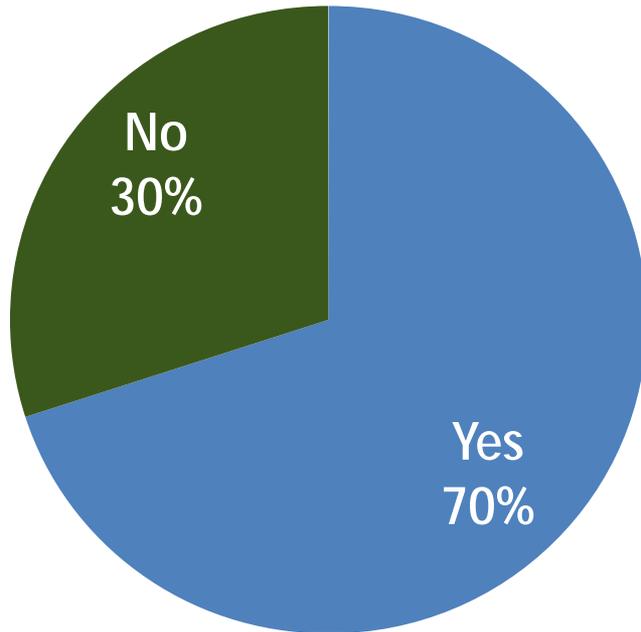


Trip Satisfaction - % Very Satisfied

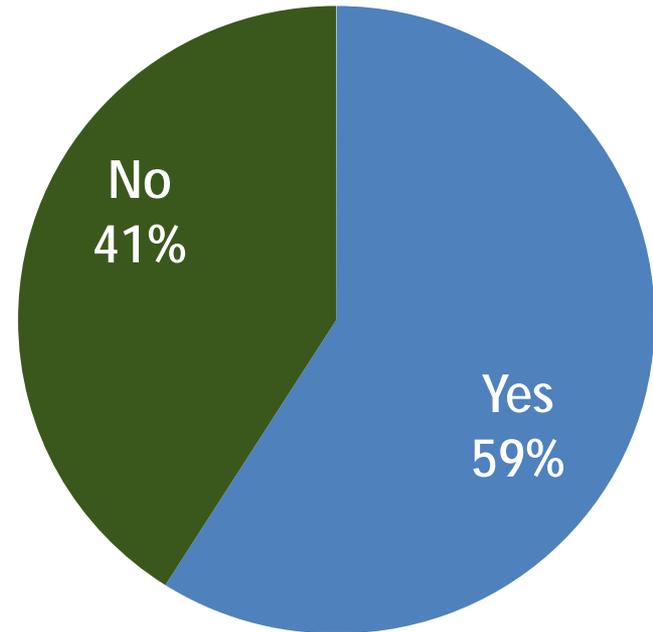


Past Visitation

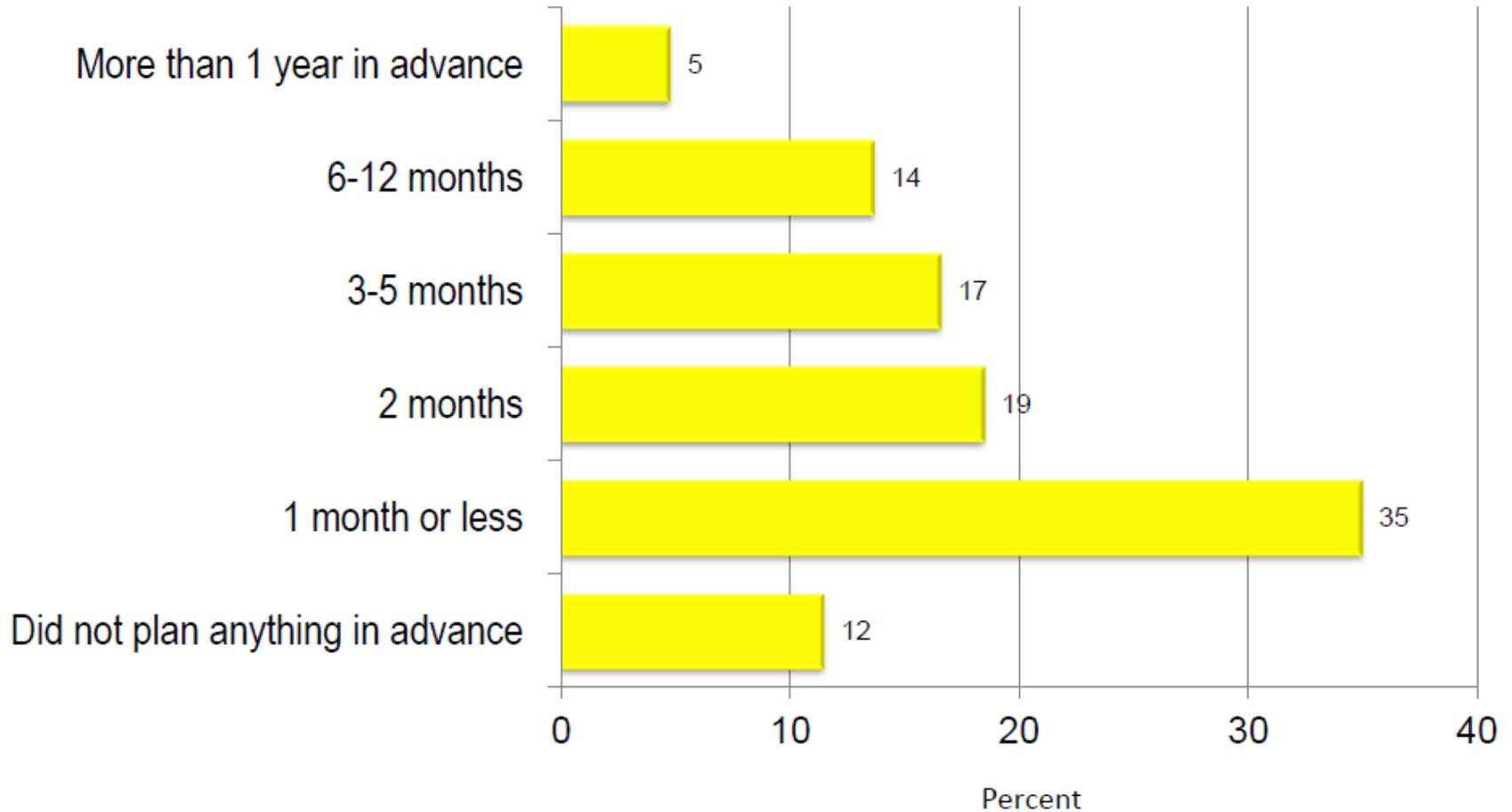
Have you ever visited the Northern Region before?



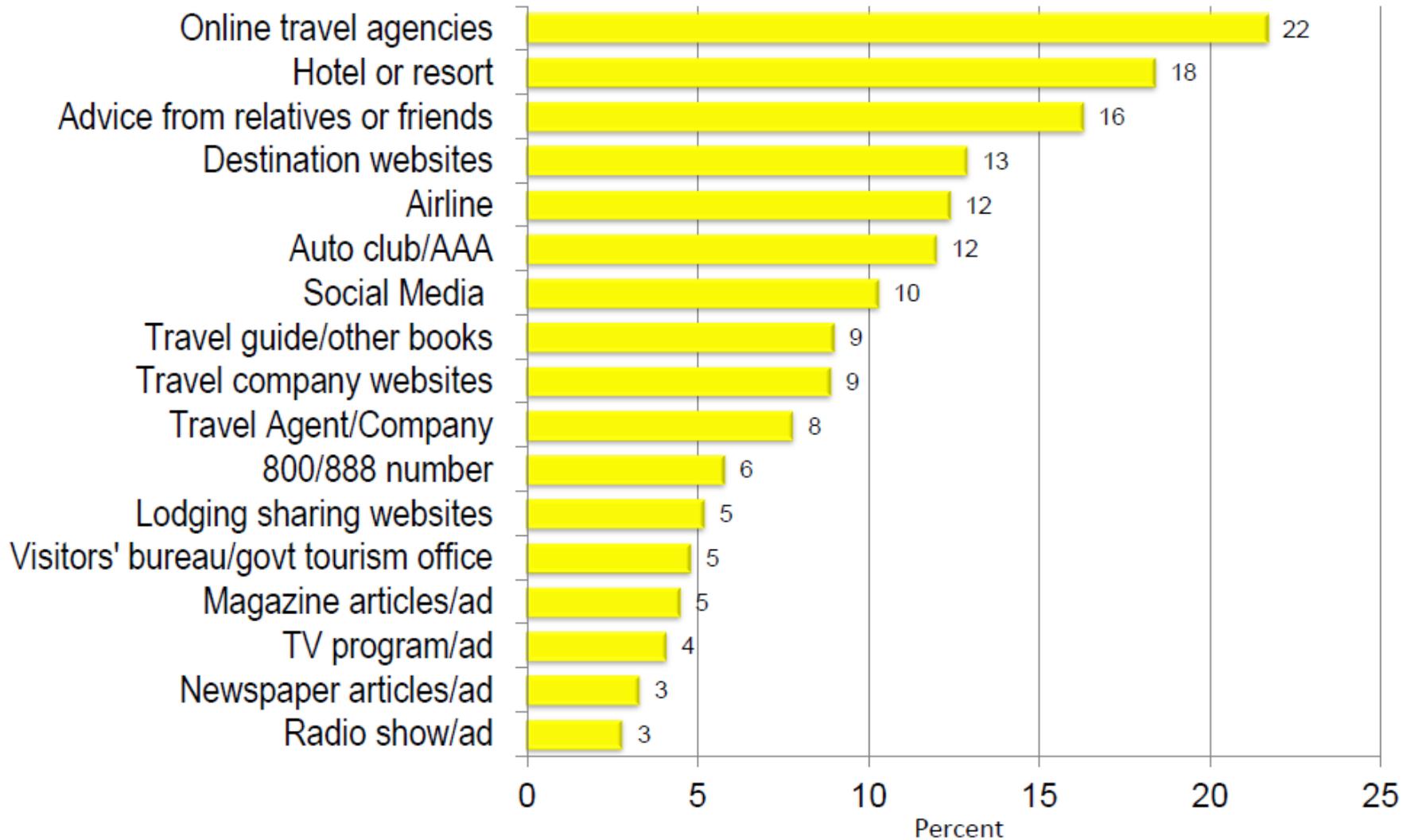
Have you visited the Northern Region in the past year?



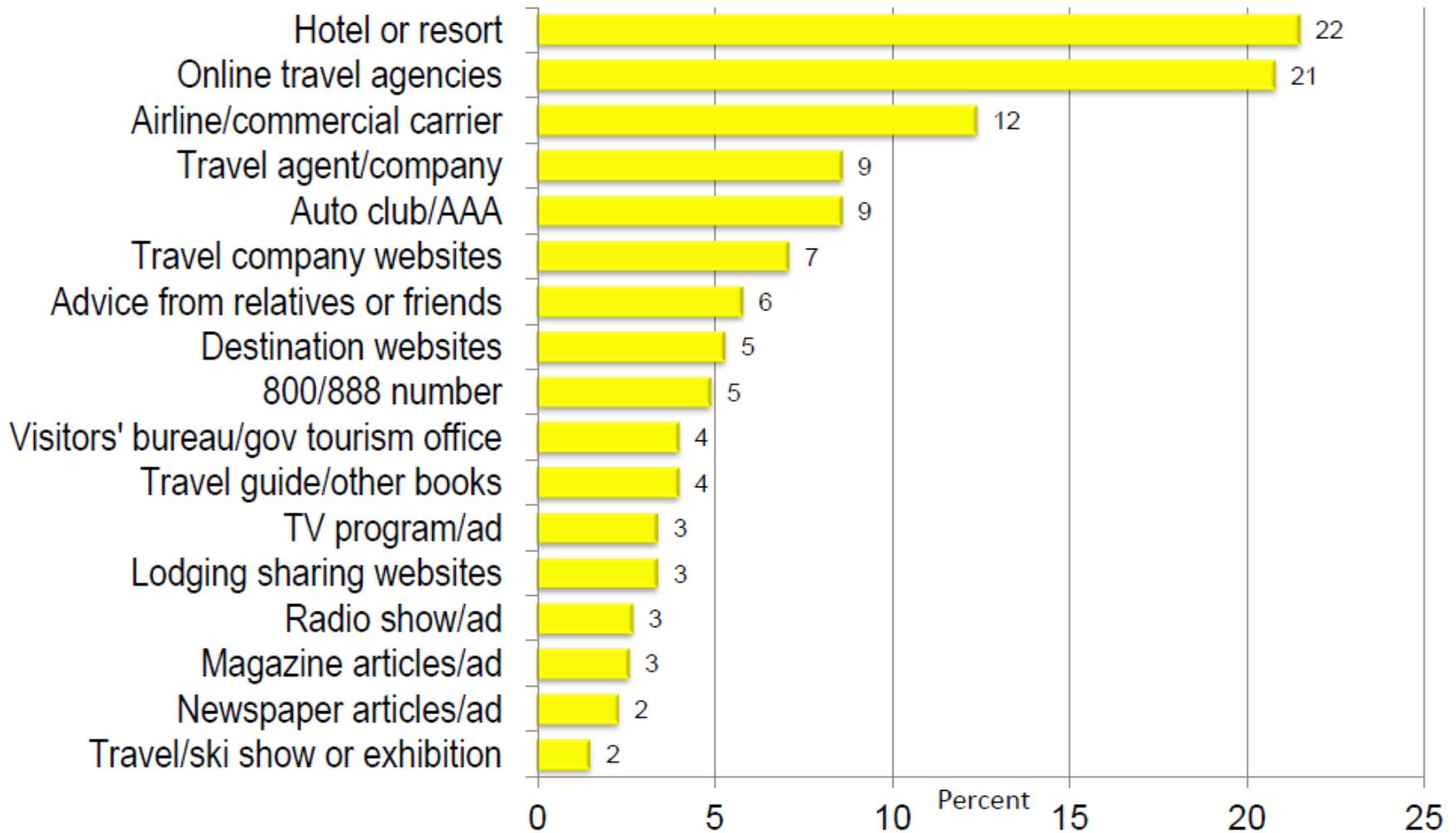
Length of Trip Planning



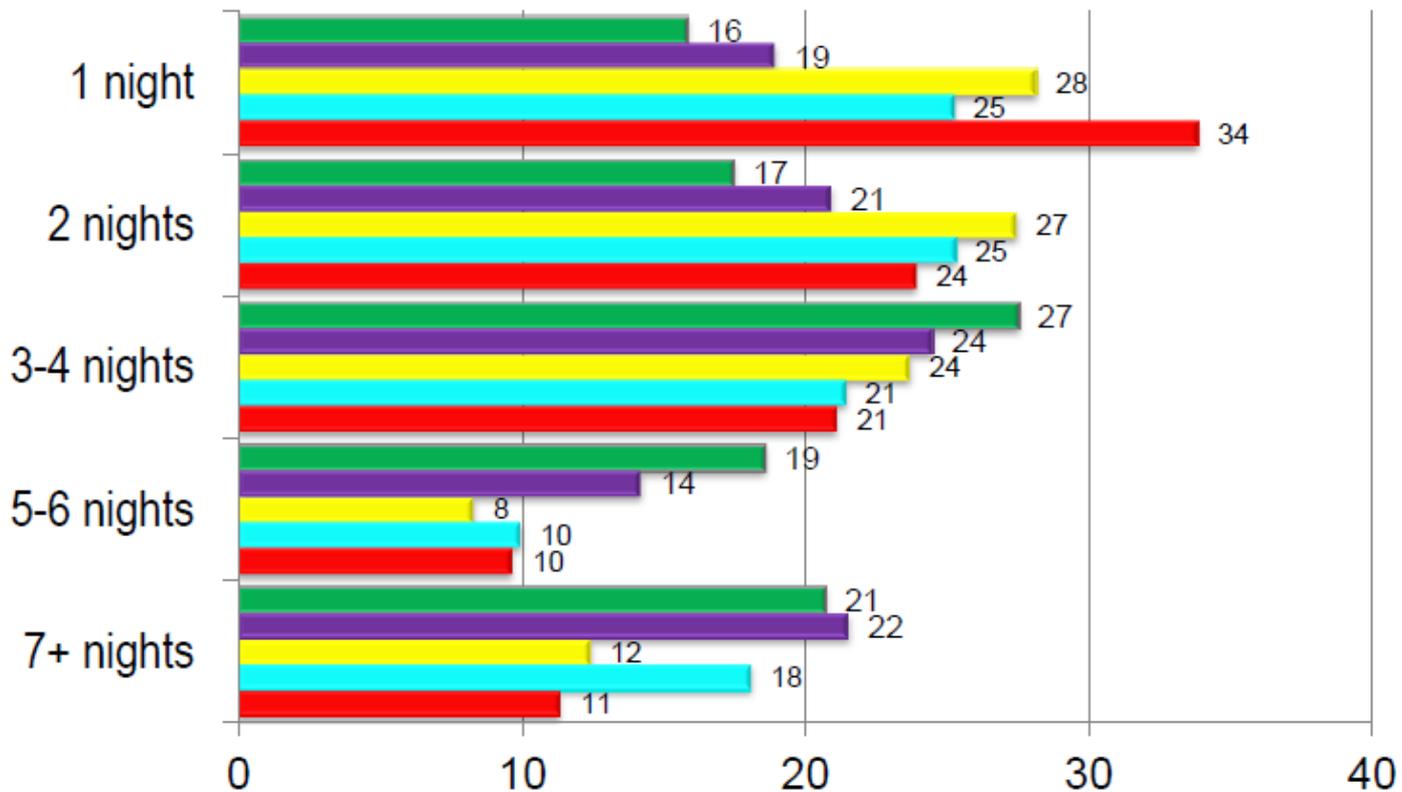
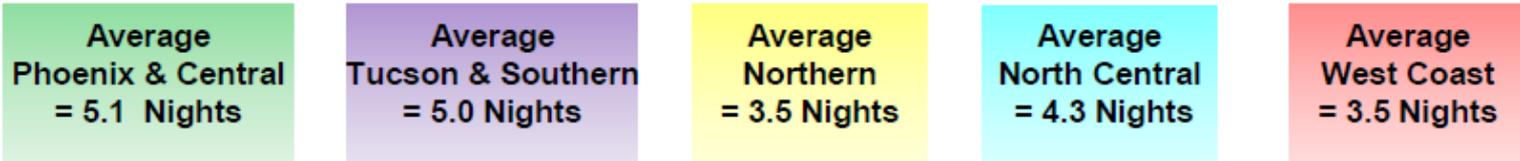
Trip Planning Information Sources



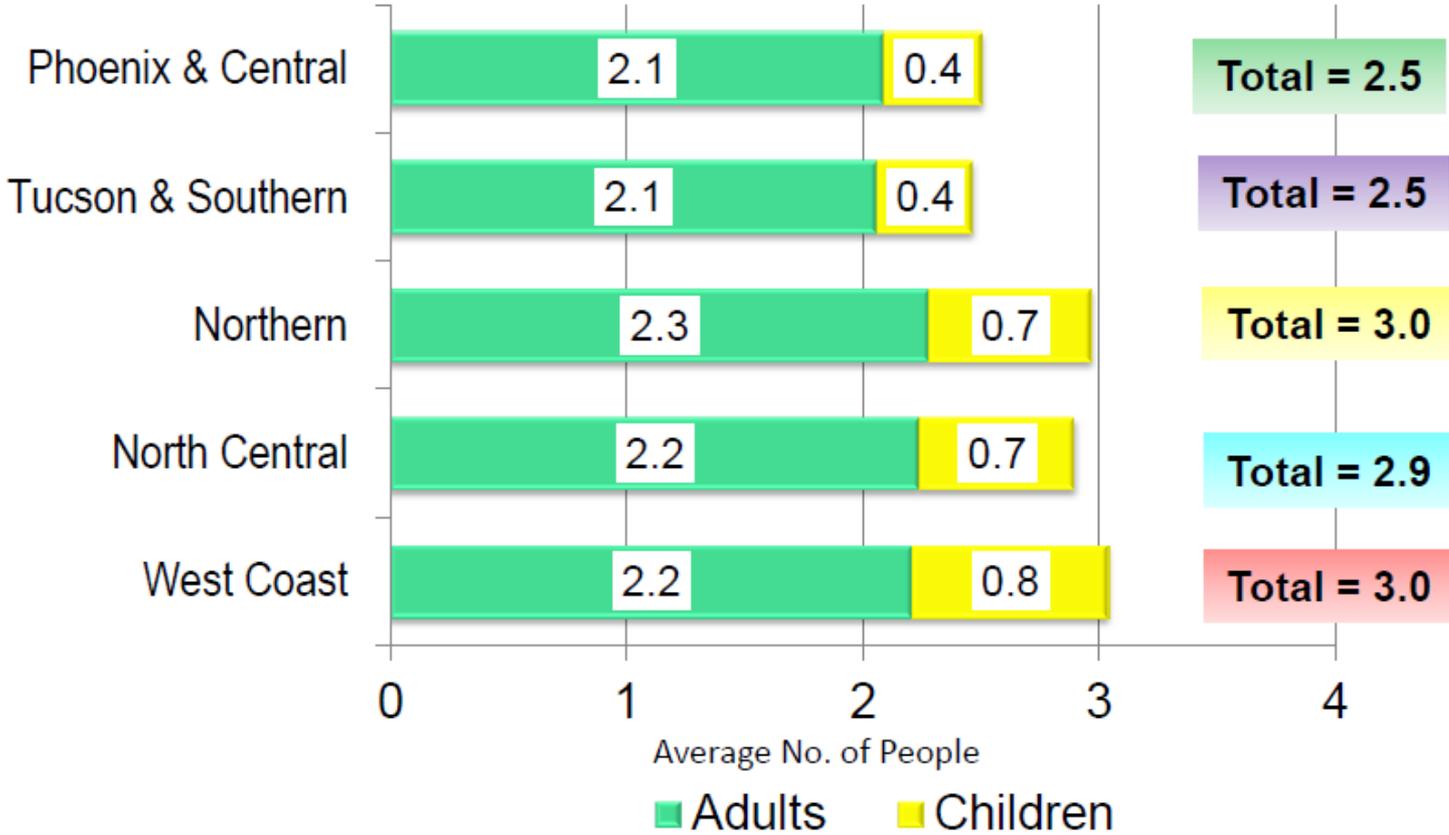
Method of Booking Trip



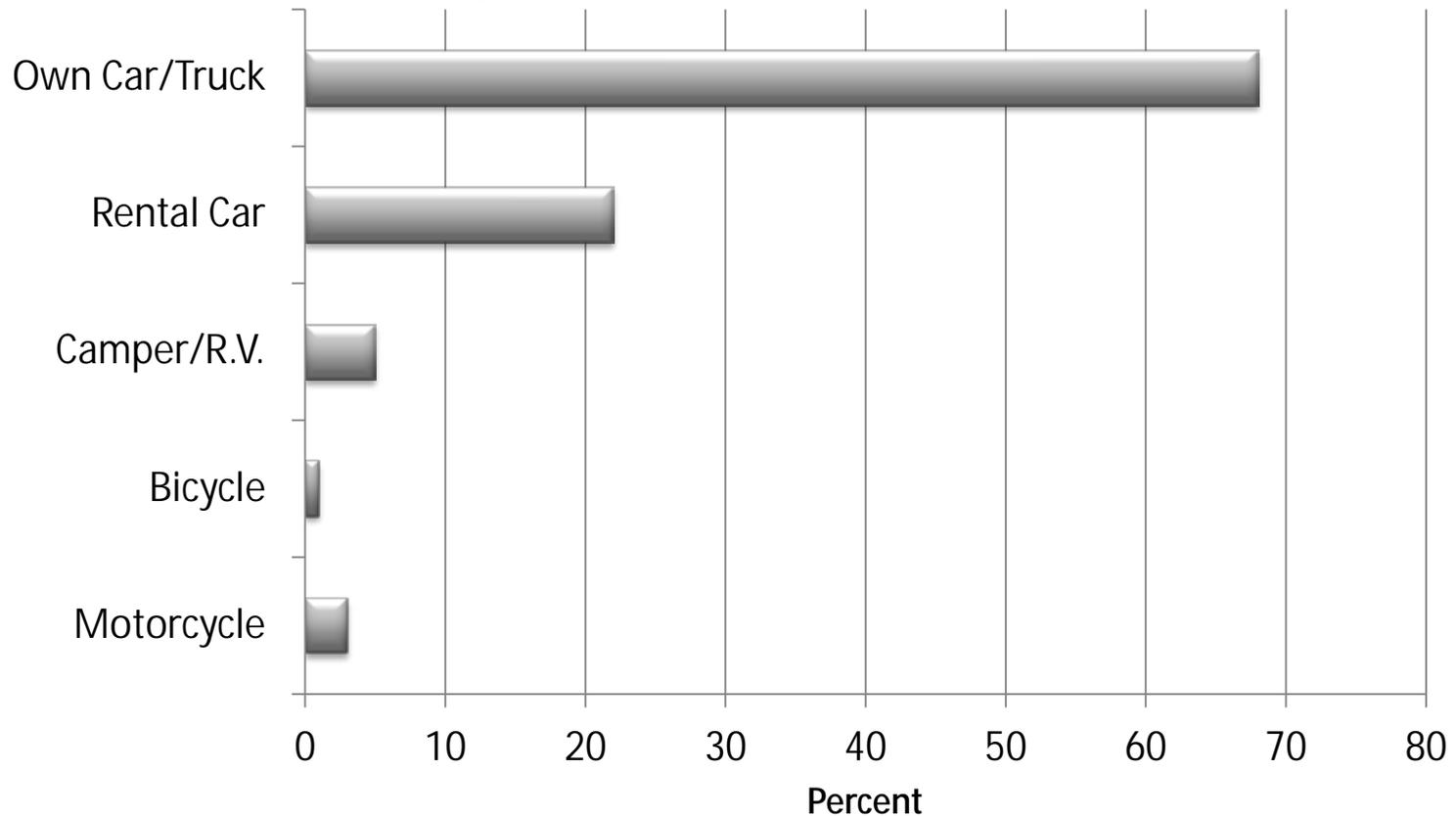
Number of Nights Spent in Region



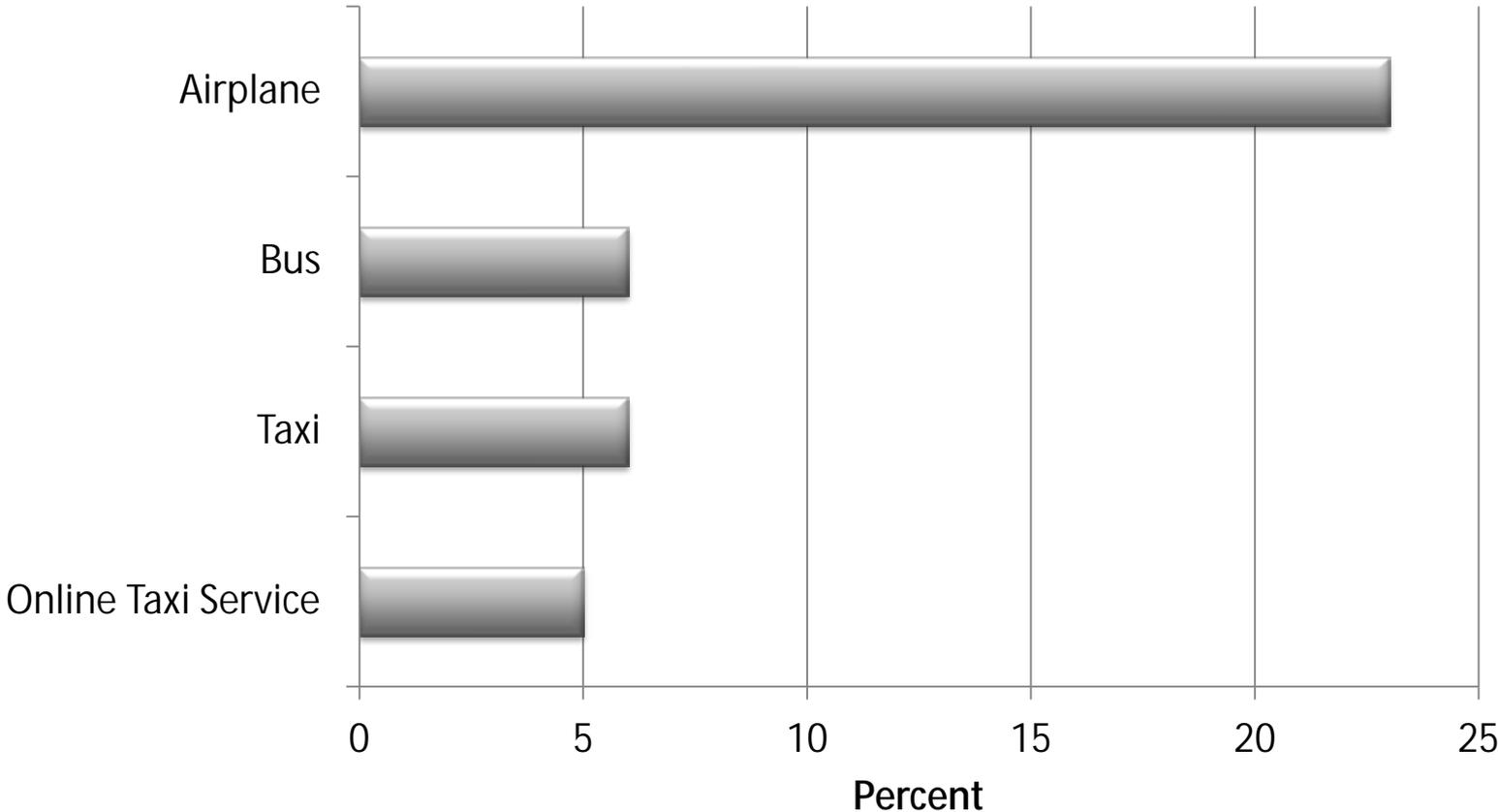
Travel Party



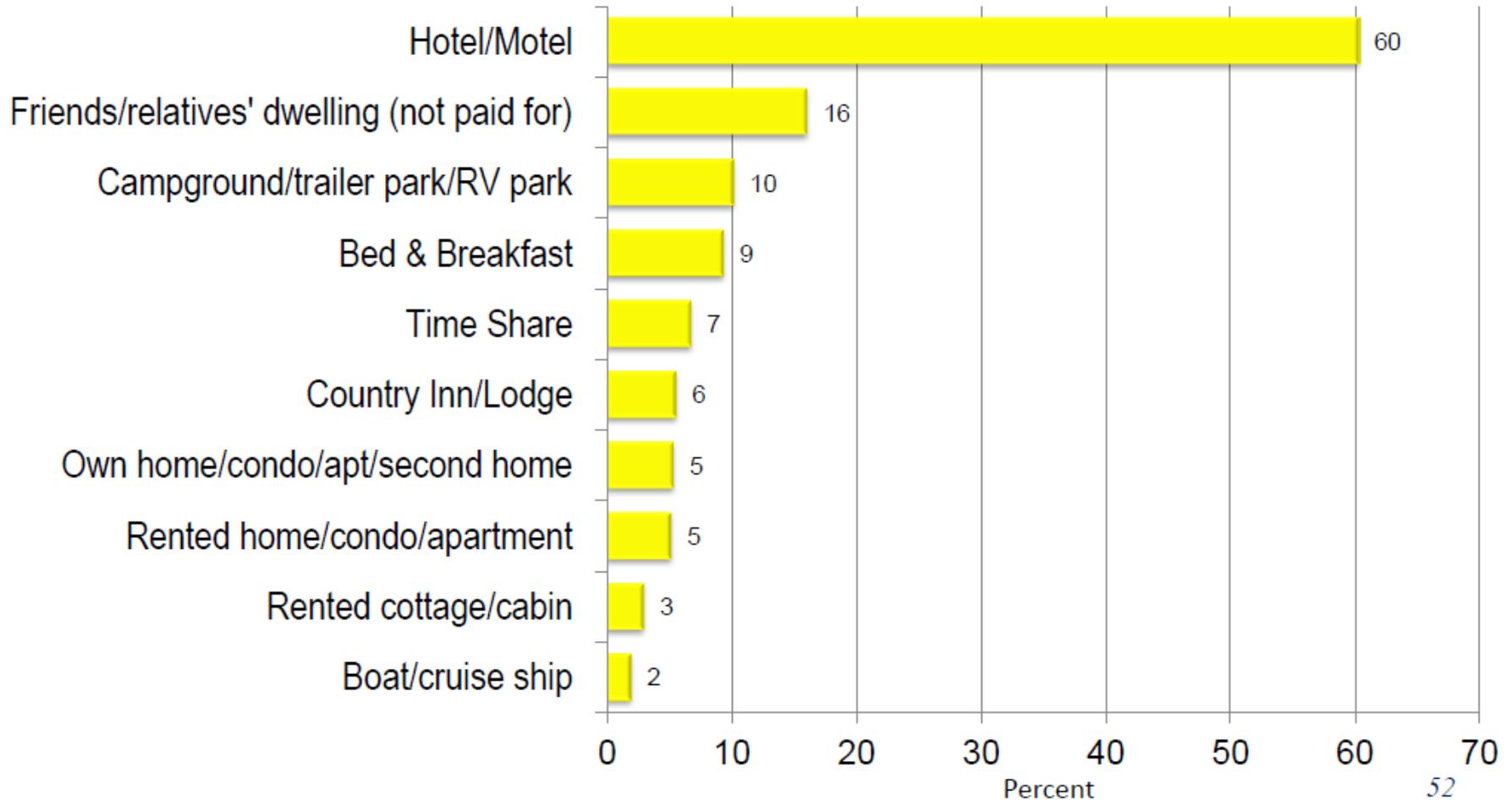
Transportation – Personal Vehicles



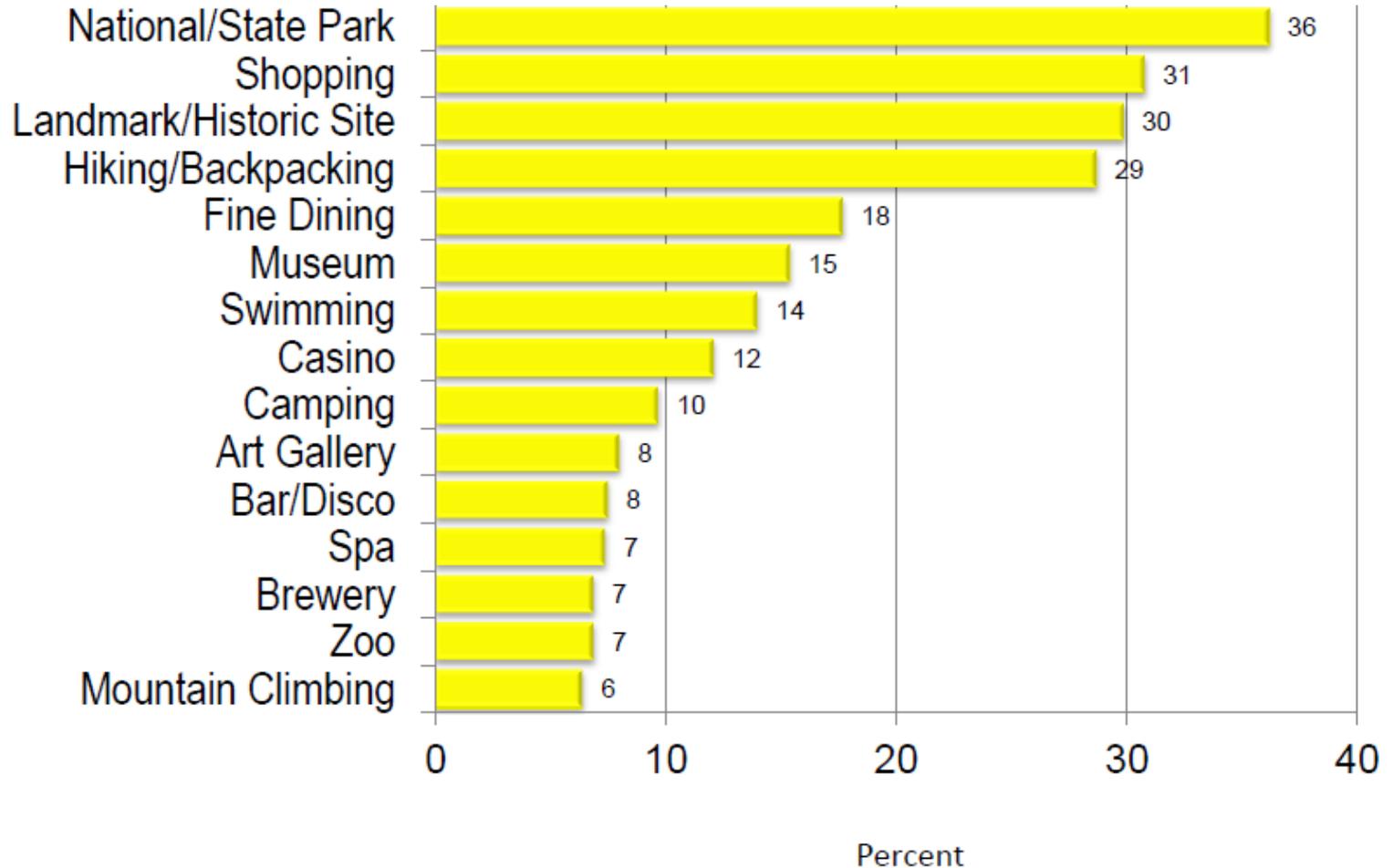
Transportation – Commercial Vehicles



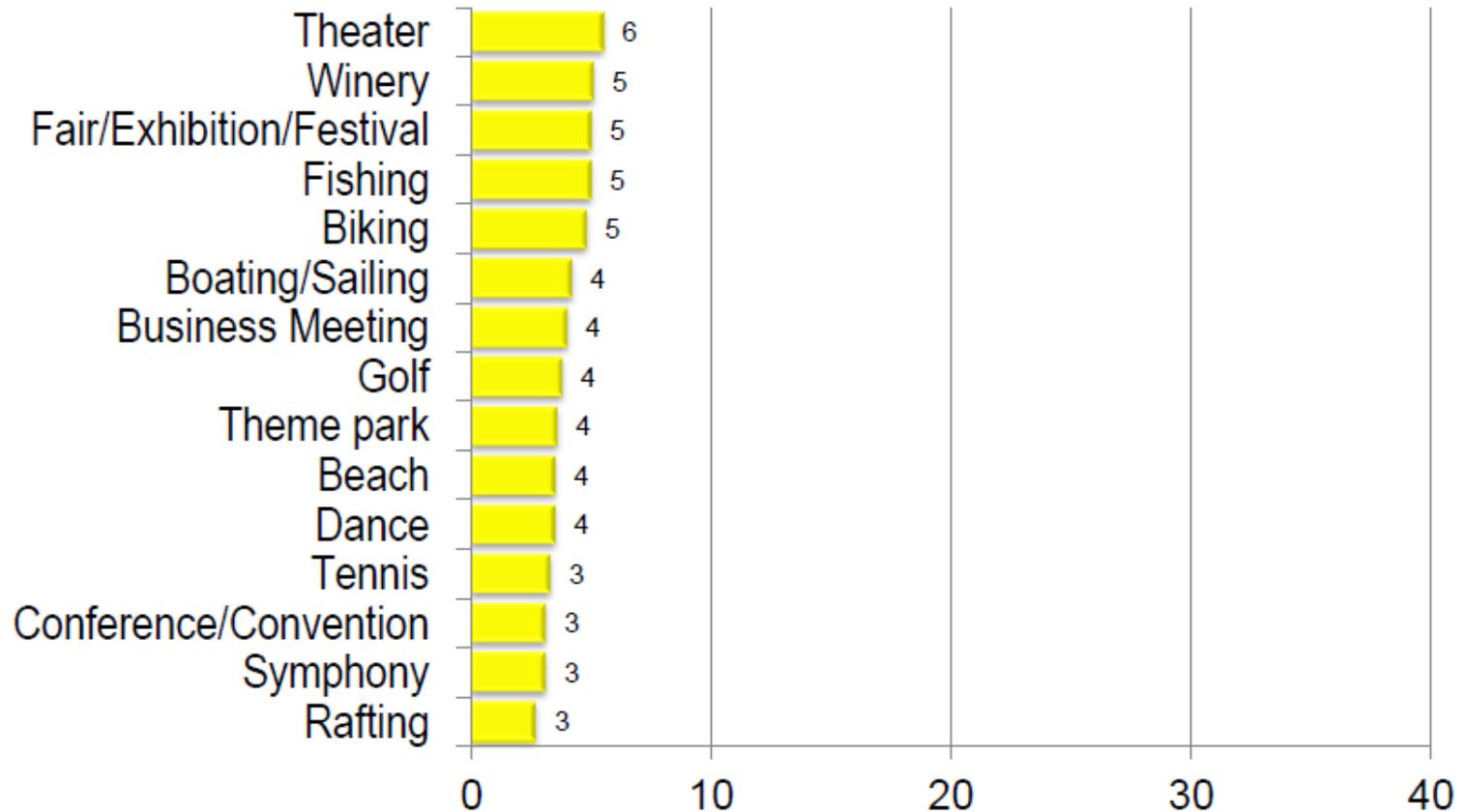
Accommodation



Activities and Experiences



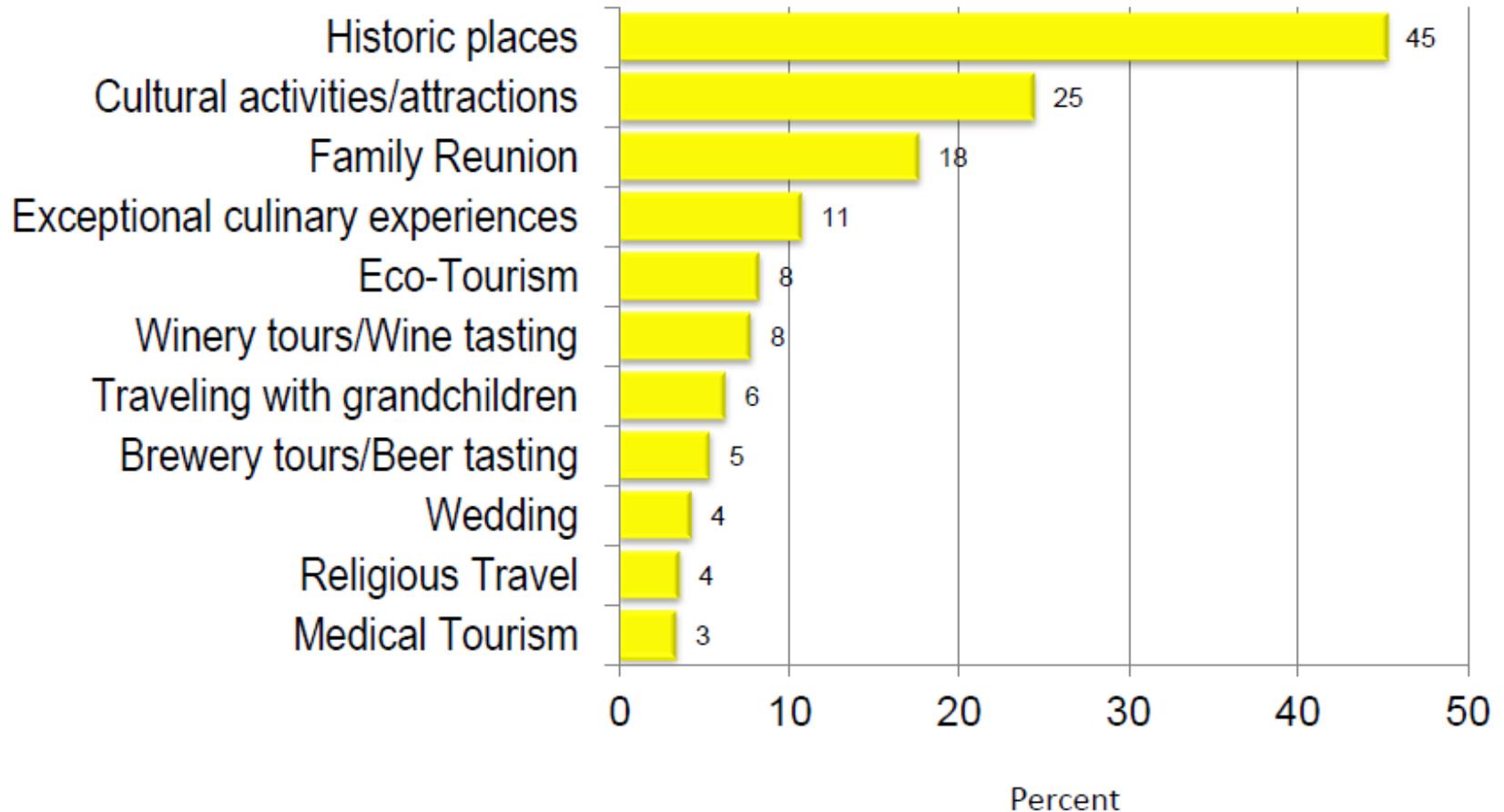
Activities and Experiences (cont.)



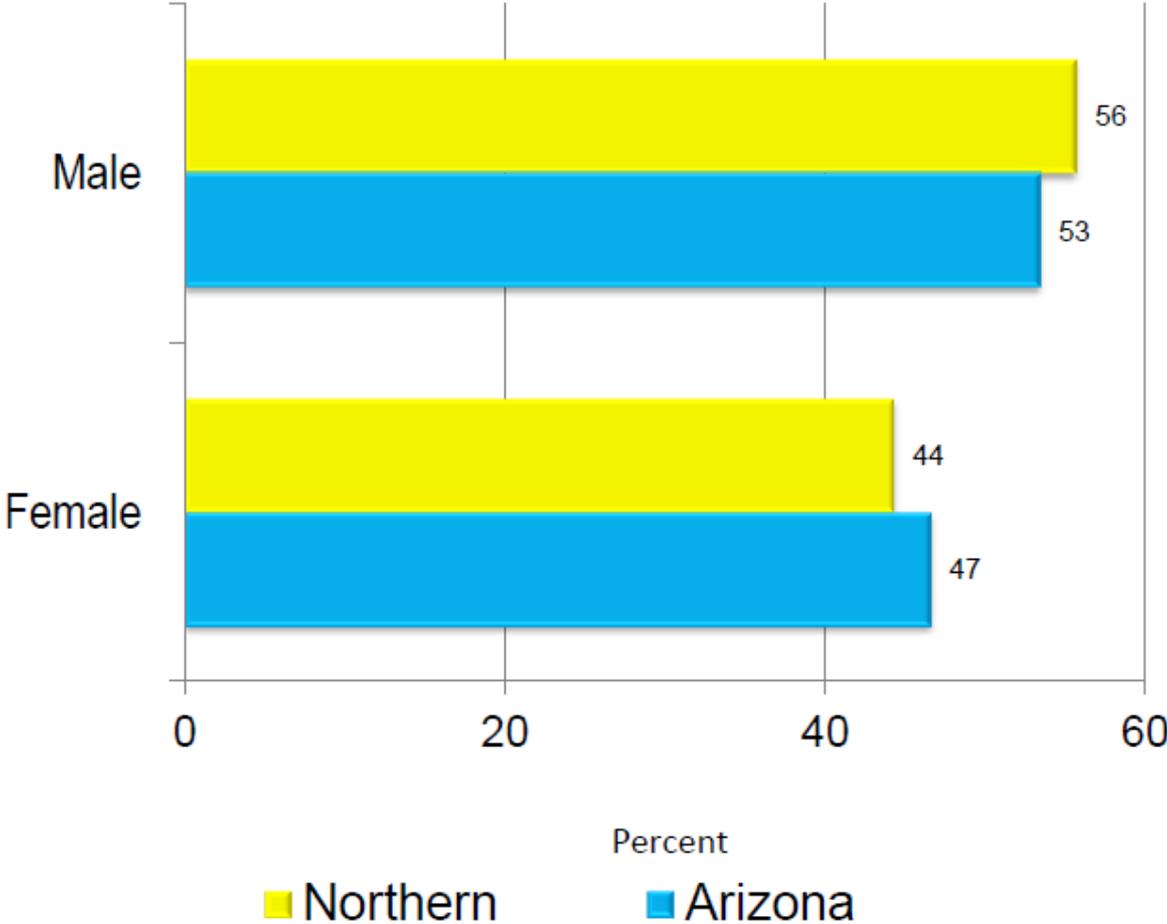
Percent



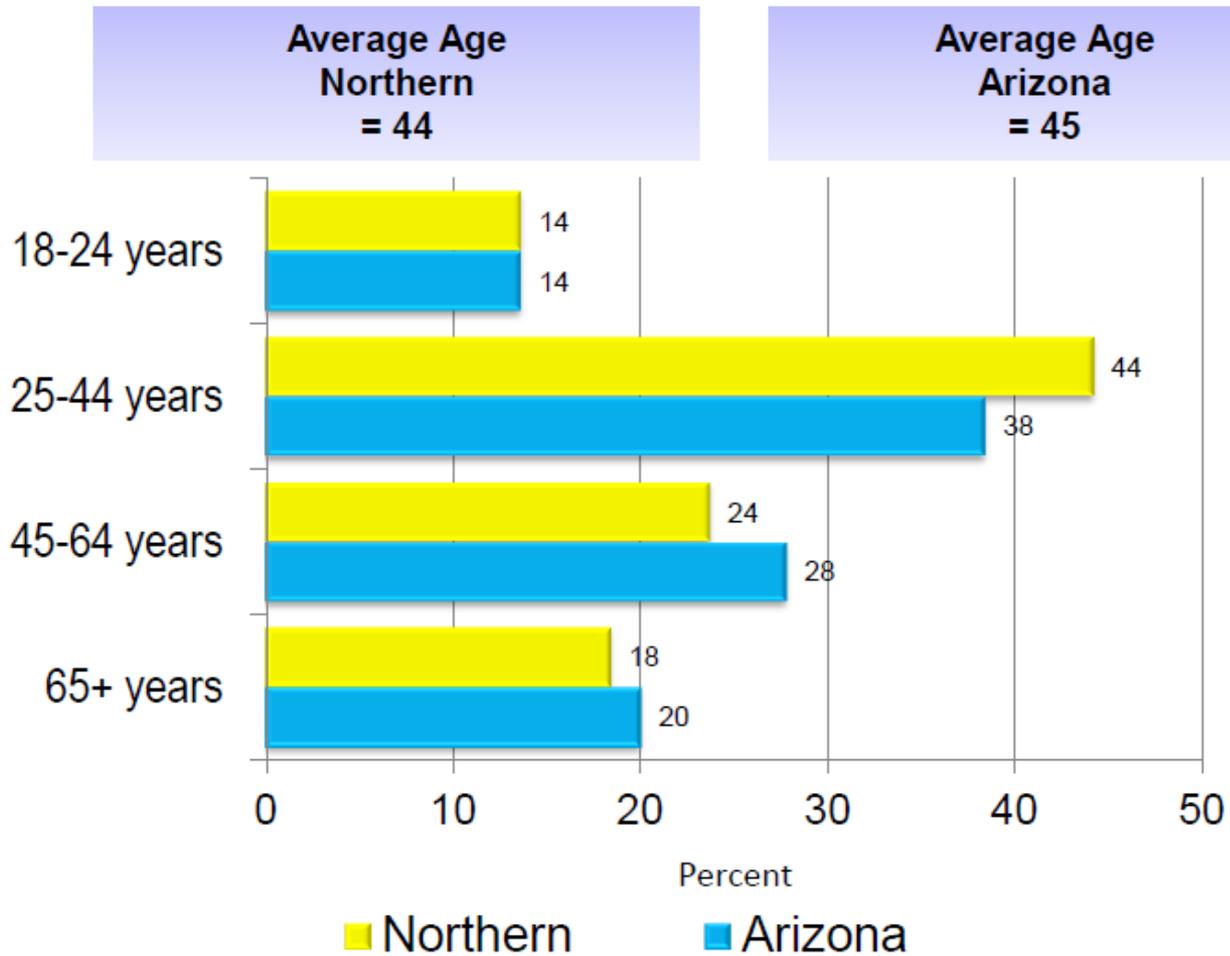
Activities of Special Interest



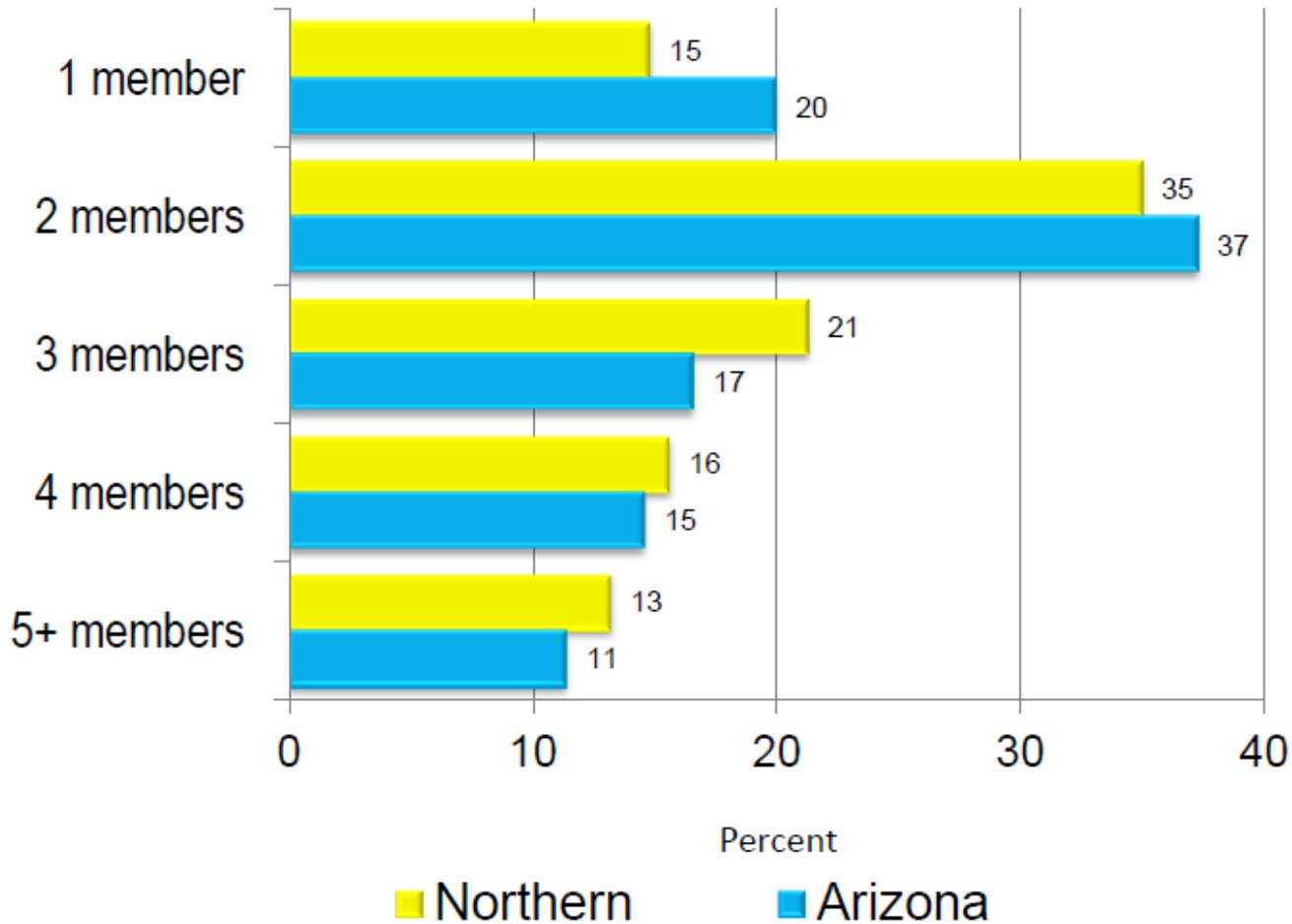
Gender



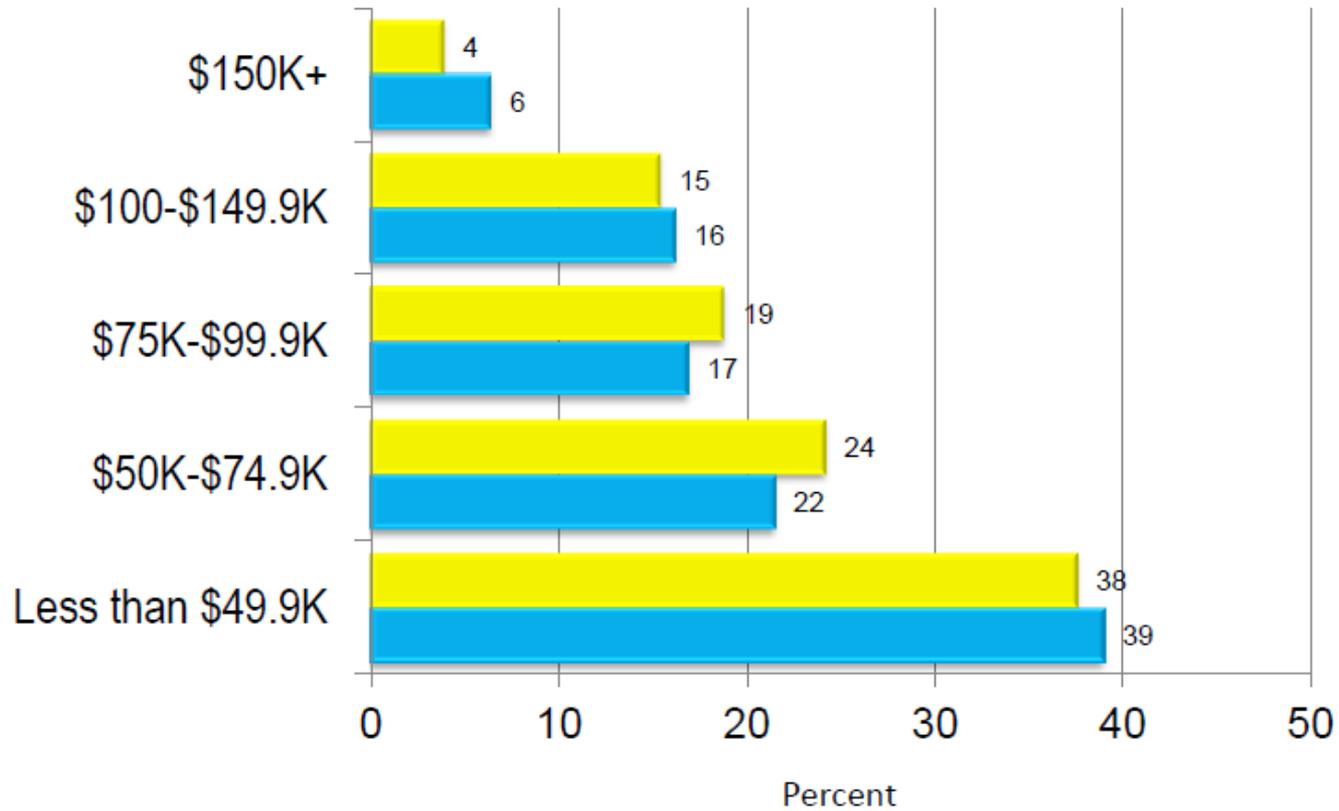
Age



Household Size



Household Income

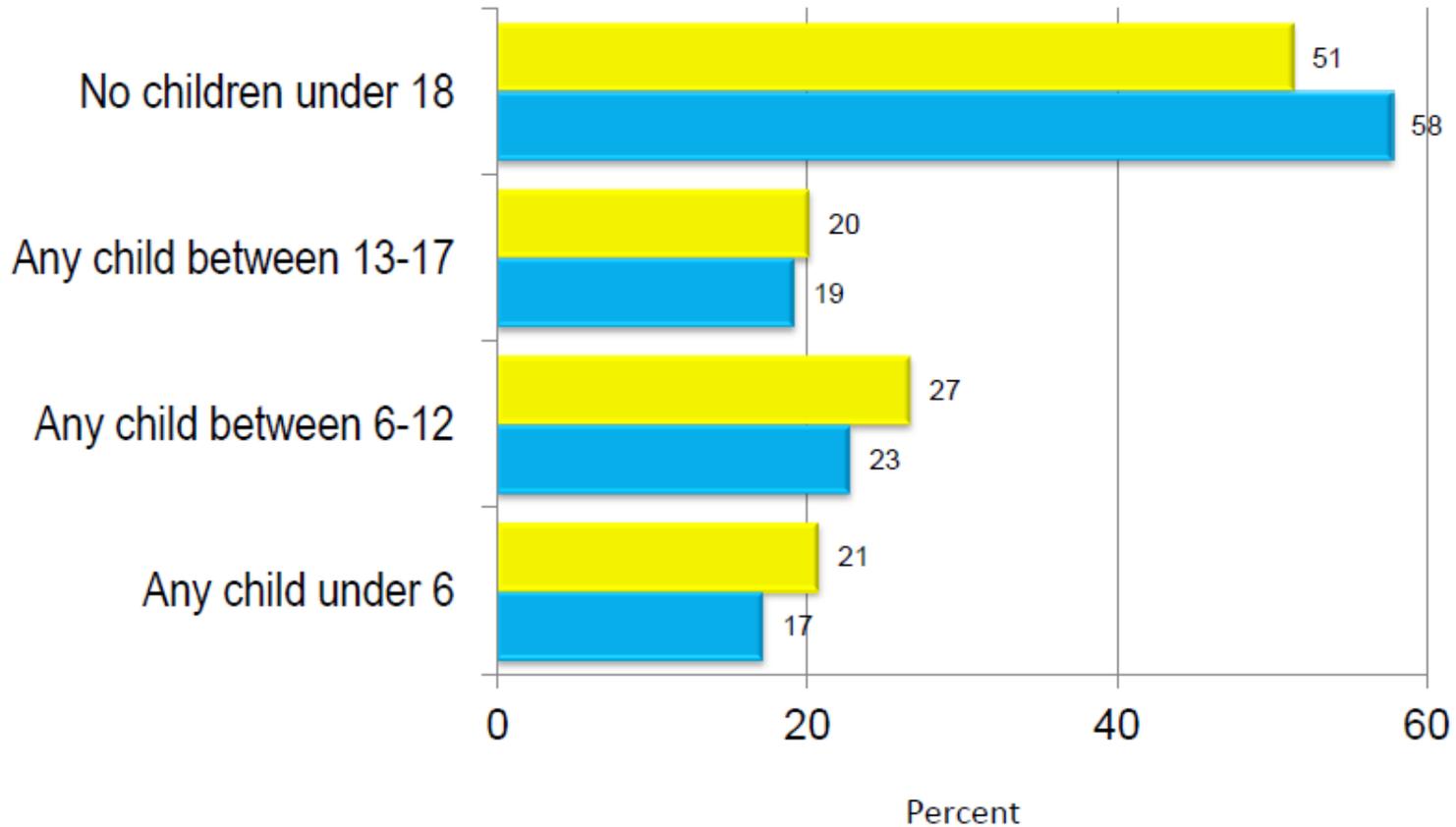


■ Northern

■ Arizona

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Children in Household

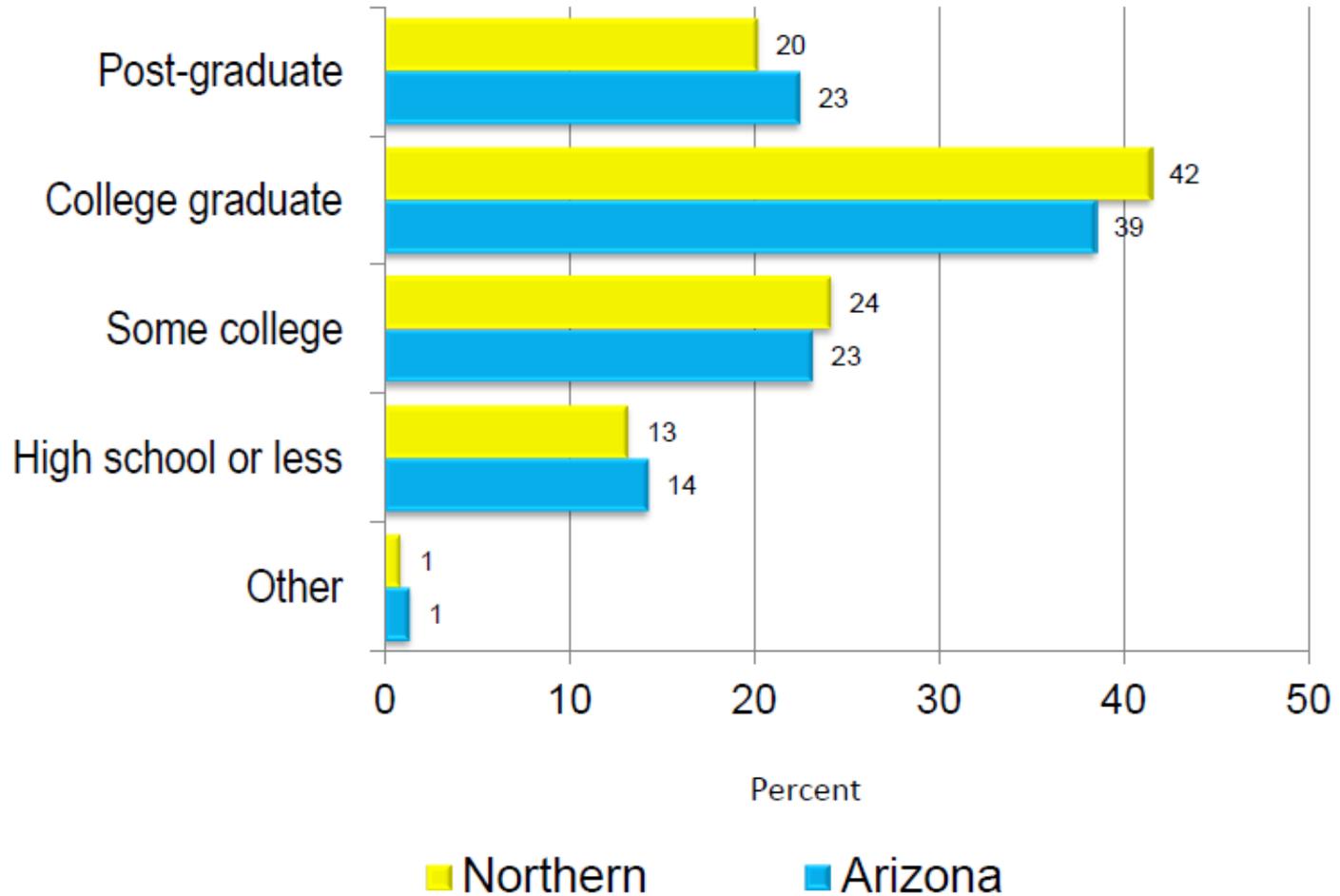


■ Northern

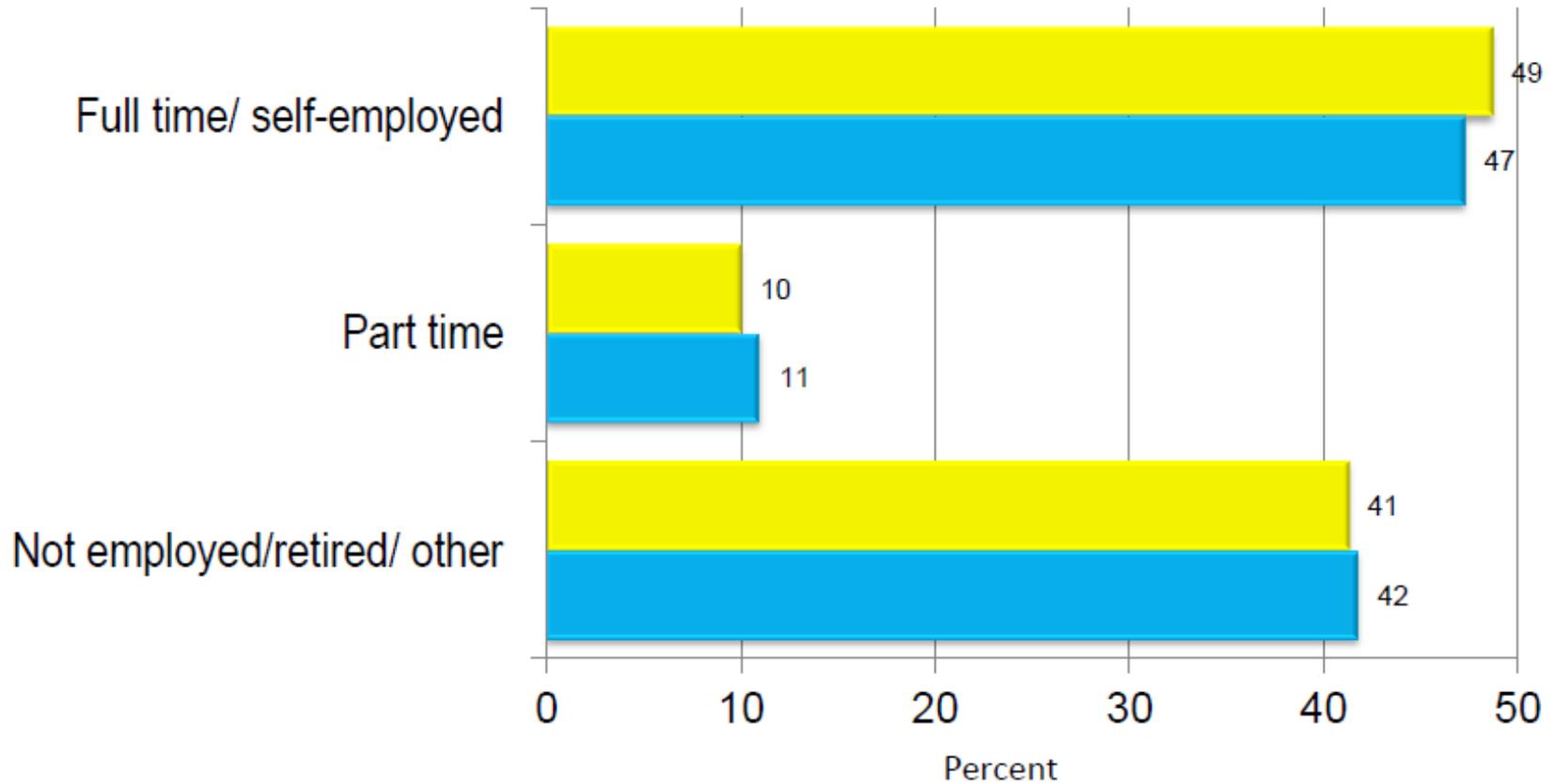
■ Arizona



Education



Employment

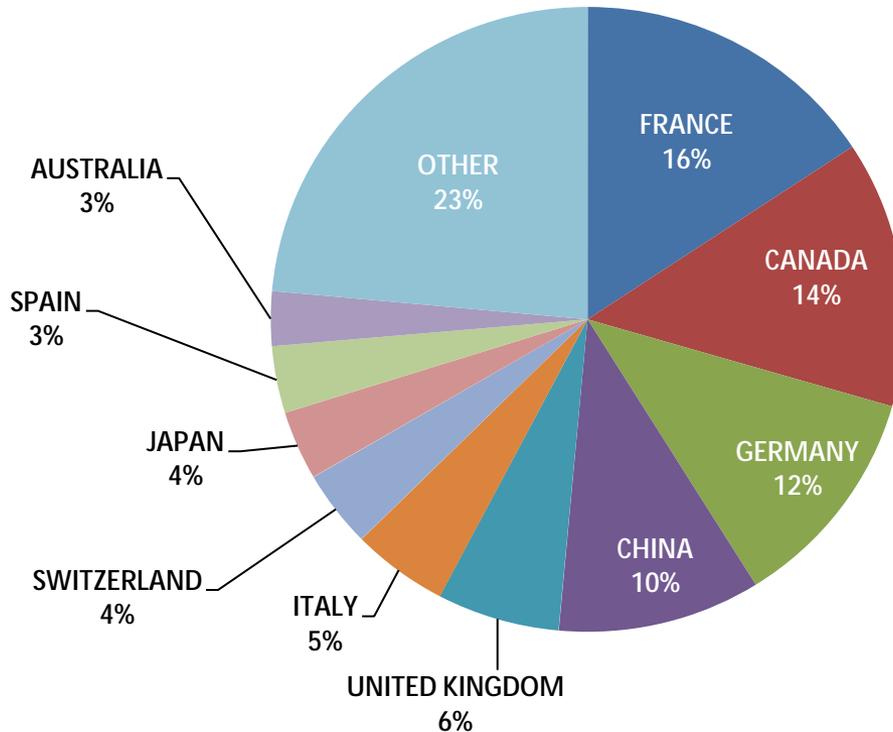


Arizona

INTERNATIONAL VISA CARD SPENDING

Northern Region

2015 Regional Visa Spending by Country

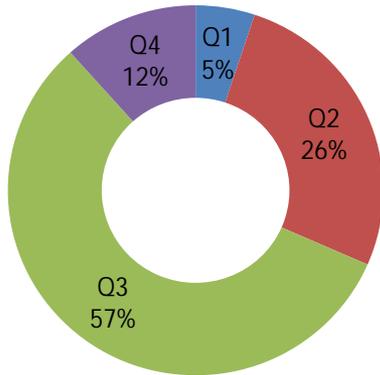


Northern Region		
1	FRANCE	15.7%
2	CANADA	13.8%
3	GERMANY	11.6%
4	CHINA	10.4%
5	UNITED KINGDOM	6.2%
6	ITALY	4.9%
7	SWITZERLAND	4.0%
8	JAPAN	3.6%
9	SPAIN	3.5%
10	AUSTRALIA	2.8%
	OTHER	23.6%

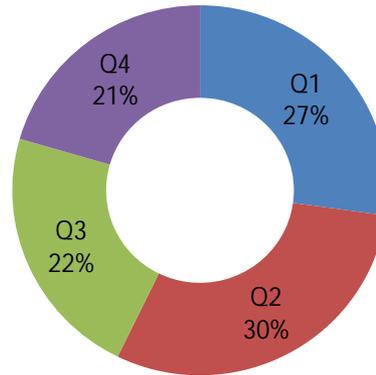


2015 Regional Visa Spending by Calendar Quarter

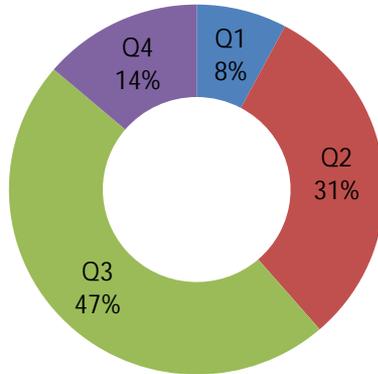
France



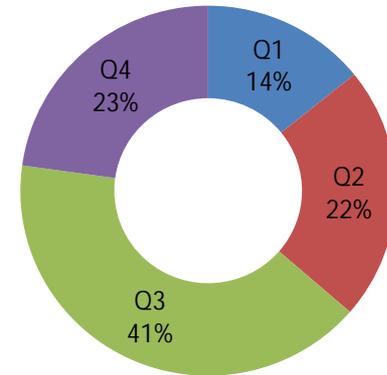
Canada



Germany

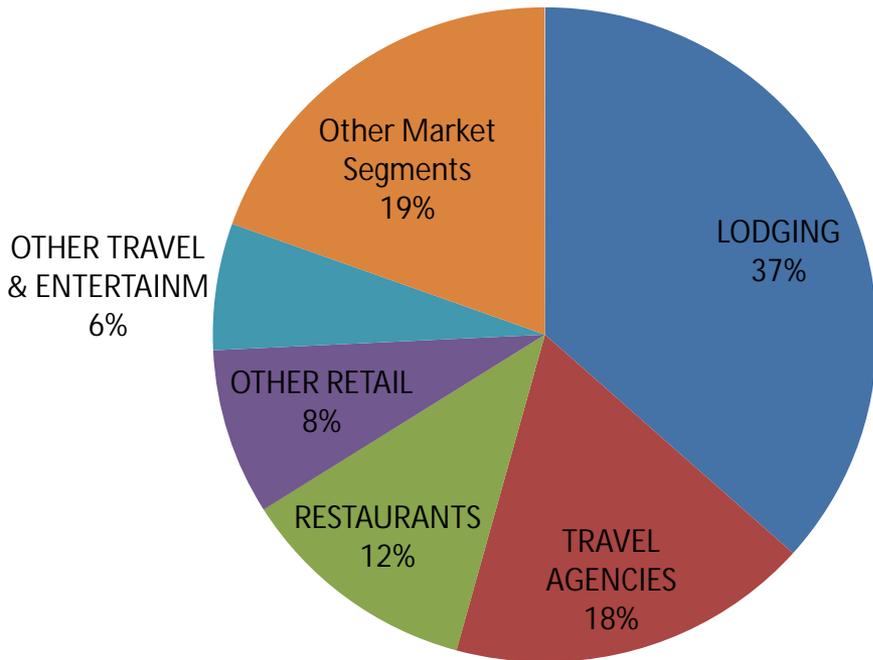


China

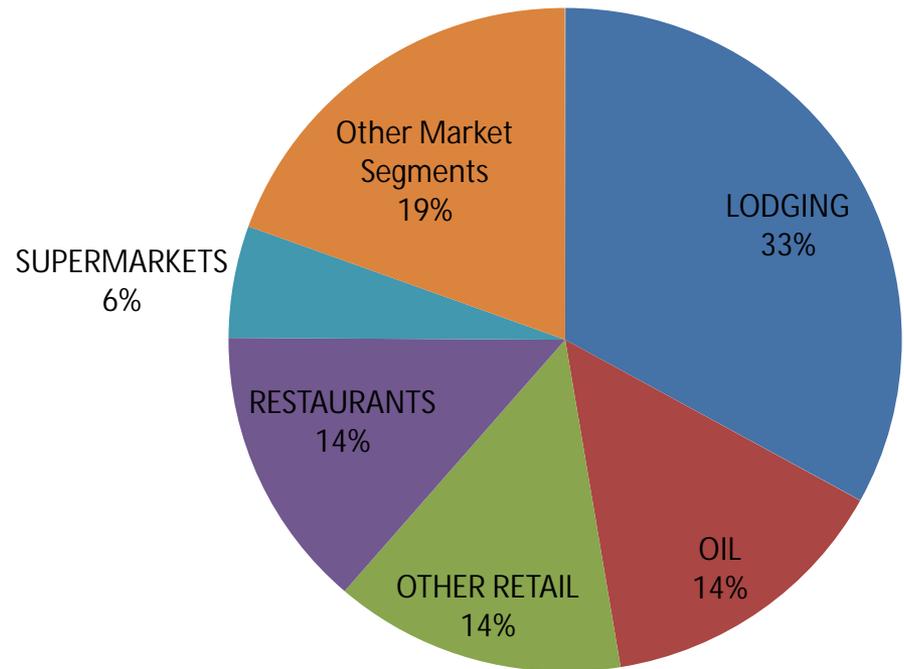


2015 Visa Spending by Merchant Category

France



Canada



2015 Visa Spending Trends by Country

% Change in Spending YOY

Country	Northern	Arizona
FRANCE	-22.70%	-17.60%
CANADA	-9.10%	-15.70%
GERMANY	-20.40%	-15.60%
CHINA	47.60%	34.80%
UNITED KINGDOM	-9.60%	-2.20%
ITALY	-24.20%	-18.80%
SWITZERLAND	-7.90%	-0.80%
JAPAN	5.40%	-0.30%
SPAIN	-21.70%	-20.30%
AUSTRALIA	-5.70%	-5.40%



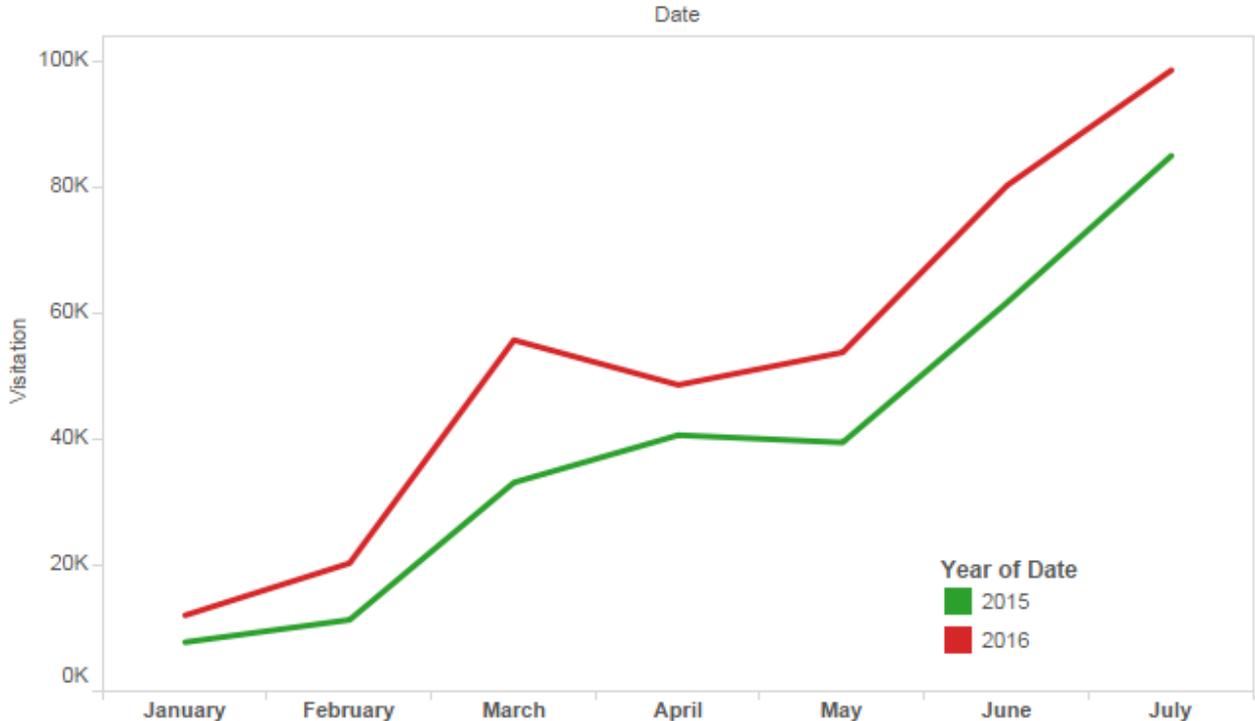
2016 TOURISM INDICATORS TO DATE

Northern Region

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

State Parks Visitation

State Parks Visitation YTD YOY



Visitor Count YTD through July

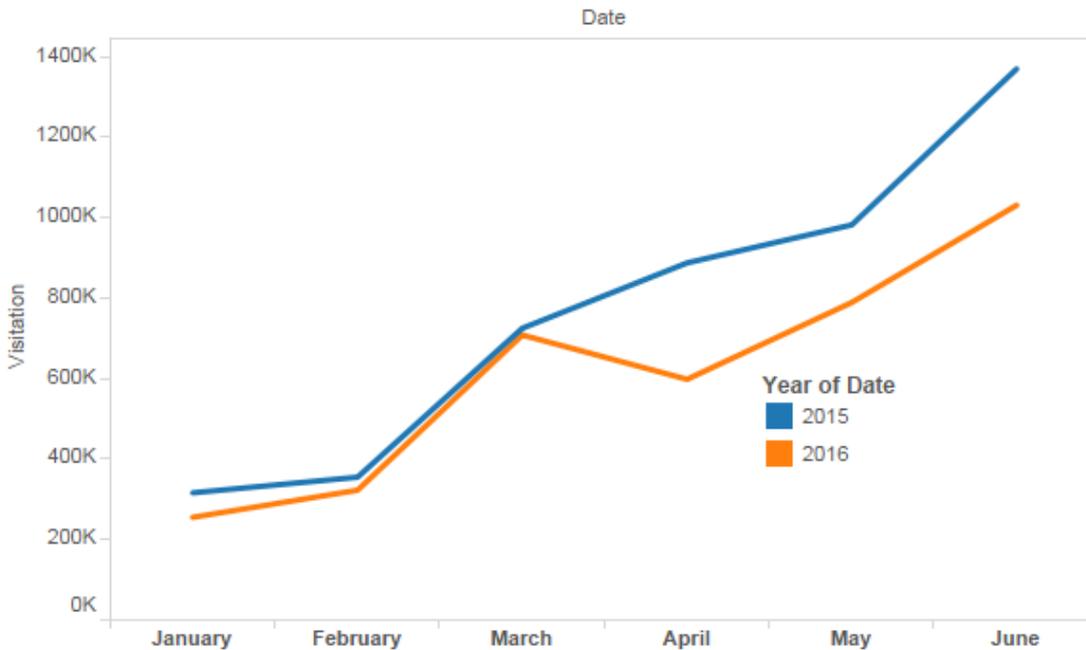
Park	Date		
	2014	2015	2016
Fool Hollow Lake RA	61,925	65,656	62,104
Homolovi Ruins SP	12,128	12,957	13,794
Lyman Lake SP	10,124	11,941	6,767
Riordan Mansion SHP	14,671	13,209	13,412
Slide Rock SP	79,881	175,474	273,478



Source: NAU

National Parks Visitation

National Parks YOY YTD



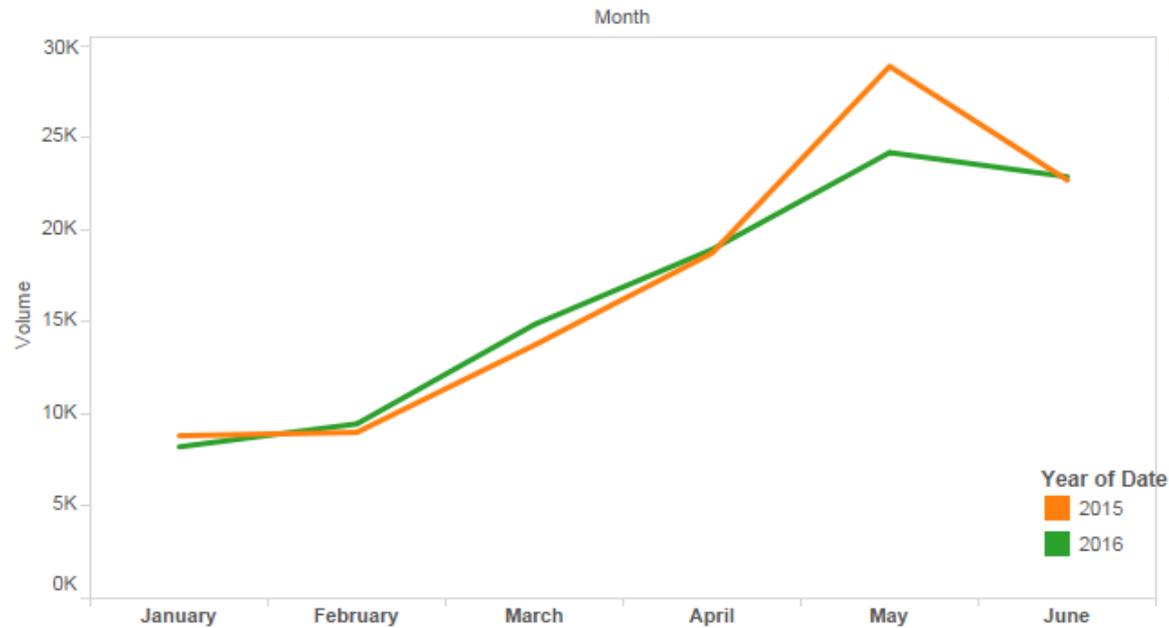
Visitation YTD through June

Park	Date		
	2014	2015	2016
Canyon de Chelly NM	401,408	402,369	147,604
Glen Canyon NRA	932,133	1,015,927	329,751
Grand Canyon NP	2,051,178	2,496,920	2,661,693
Hubbell Trading Post N..	41,353	32,395	33,209
Navajo NM	29,492	30,098	29,317
Petrified Forest NP	383,187	395,648	285,015
Sunset Crater Volcano ..	83,346	91,298	35,675
Walnut Canyon NM	69,672	71,560	74,255
Wupatki NM	88,405	97,233	106,242



Airport Passenger Volume

Airport Passenger Volume YOY



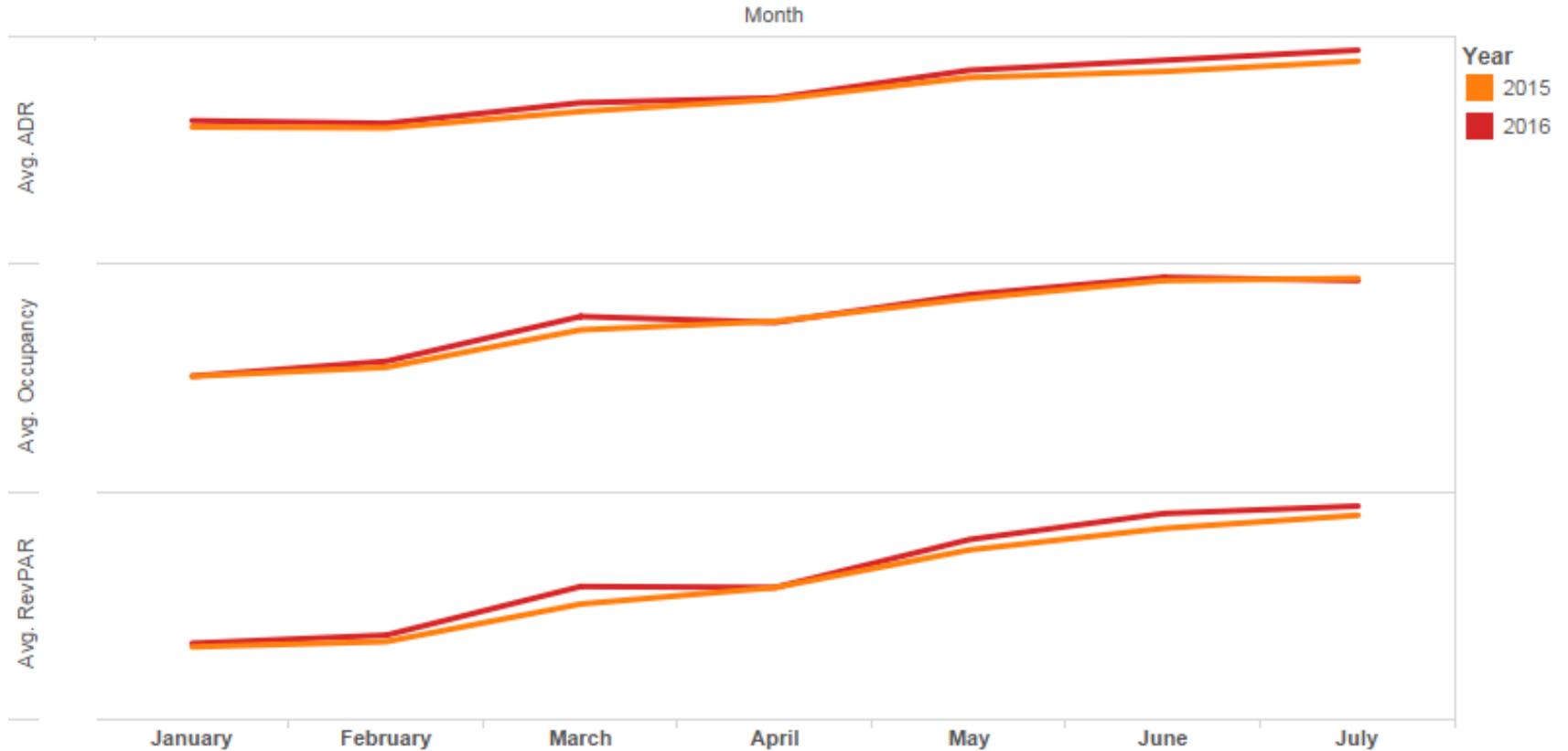
Passenger Volume YTD through June

Airport	Date	
	2015	2016
Flagstaff Pulliam	63,118	65,651
Page Municipal	37,576	30,107
Show Low Regional	1,178	2,790



Lodging Indicators

YOY Lodging Indicators - Northern Region



Gross Sales by County

Arizona Hospitality Research & Resource Center, NAU

http://franke.nau.edu/ahrrc/library/monthly_gross_sales_data



Q&A

Northern Region

Presentation slides available at:

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