



A Tourism and Recreation Future for Arizona's Copper Corridor Region

A report on the collaboration of community leaders and businesses working to grow opportunities for economic, social and environmental benefits

ASU center for **sustainable tourism**
ARIZONA STATE UNIVERSITY



For more information on the results of the study
scrd.asu.edu/sustainabletourism
discovercoppercorridor.org
tourism.az.gov

The Copper Corridor in central Arizona consists of 11 mining and former mining communities. Reductions in the mining industry have made the Copper Corridor ripe for economic diversification and revitalization. With high desert rocky terrain, mountain vistas and abundant wildlife, the region is a prime area for a more robust tourism and recreation economy.

The area is poised to become a regional destination for outdoor recreationists, including Arizona Trail hikers, off-highway vehicle riders on public lands, community event attendees, and visitors seeking a getaway from the Phoenix or Tucson metropolitan areas. Creative new businesses from Superior to Oracle are paving the path for residents and tourists to enjoy all that the area has to offer.

To create a regional tourism destination, the Copper Corridor Economic Development Coalition formed a partnership of community leaders and residents working with faculty and students from the Center for Sustainable Tourism at Arizona State University, Arizona Office of Tourism staff, and numerous local and statewide stakeholders. The team wanted to conduct a thorough assessment of the tourism market and available opportunities to better inform strategy and create a solid foundation for tourism development.

Research methods and implementation

The tourism planning and research methods applied included holding stakeholder sessions for SWOT analysis, surveying Arizona Trail users in Oracle, Kearny and Superior, surveying both tourists and residents at signature events, surveying off-highway vehicle recreationists, and tabulating guest logs in three community information centers.

The study was conducted under the supervision of Dr. Christine Vogt, Director of the Center for Sustainable Tourism, and designed and implemented by research assistants, Maya Azzi, Kari Roberg (graduate students), and Chase Perren (undergraduate student), and ASU undergraduate student class TDM 402 (fall 2015 through spring 2016).

In 2016, several stakeholder meetings were held by the Copper Corridor Economic Development Coalition to craft a vision and mission and examine progress. Accomplishments of the Coalition and tourism partners to date include:

- Website development and distribution of 10,000 regional brochures to visitor centers locally and statewide
- Use of Mobile Visitor Center – attends six to ten events per year including the mining appreciation day at the state capital
- ASU-AOT regional planning and research project
- Scenic Route designation by ADOT
- Ore Cart Trail Project – artistic ore cart site markers connecting the communities to the Copper Corridor
- USDA grant and other efforts to fund projects, such as a marketing plan and training
- Finalist for the 2016 Grand Pitch Competition hosted by Arizona Office of Tourism
- Involvement of the Arizona Trail Association and their Gateway Community efforts
- Increased presence of visitor centers in Superior and Oracle
- Events held in the communities that attract tourists
- New business development such as Arizona Zipline Adventures in Oracle



S.W.O.T. analysis

A regional focus group with interested tourism community members identified the most salient Strengths, Weaknesses, Opportunities and Threats (SWOT) held by those who live and work in the region.

Strengths or Assets

- Natural beauty
- Copper Corridor scenic route designation on AZ state roads 77 and 177
- Proximity to Phoenix and Tucson
- Historic buildings and museums
- Guest ranches/B&Bs
- Attractions – Boyce Thompson Arboretum, Biosphere, Arizona Zipline Adventures, Oracle State Park
- AZ Trail, Gila River, Aravapai Canyon, federal and state lands for novice and skilled recreational opportunities
- Events in all the communities that draw residents and tourists
- Active chambers and community groups that operate three visitor centers
- AZ Trail Gateway Communities - Oracle businesses have highest participatory actions of gateway communities

Weaknesses or Areas to Improve

- Lack of retail to attract tourists and capture spending
- Limited resources to improve surface streets and aging infrastructure
- Slow broadband access
- Small accommodation industry base for a bed tax to generate significant tourism funds
- Low use of social media to promote the region
- Need for increased community awareness of benefits of tourism
- Need for more overnight accommodations, including short-term and long-term camping, to attract tourists and generate tax revenues to fund tourism efforts

Opportunities to Promote

- Create and promote art, culture, history or recreation programs and events that theme the area
- Collaborate with Biosphere and Boyce Thompson State Park to attract visitors and market other Corridor attractions and services
- Expand events with AZ Trail to attract more short and long distance hikers
- Invite state and international journalists to the area, as well as regular press releases to media such as AZ Highways, metro newspapers, or city magazines
- Encourage businesses and their employees to cross-market communities in the Corridor and to participate in state tourism programs and professional organizations

Threats to Success

- Small towns are losing population; people, especially young adults, leave the area for jobs and education, which effects tax base and vibrancy of community
- Competition from other Arizona communities that are further along in their tourism planning

“At our core, travel and tourism is an impactful economic development tool. We are excited to see the Copper Corridor region come together, recognize their visitor assets and generate a positive economic contribution that will benefit communities throughout the entire area.”

– Debbie Johnson, Director, Arizona Office of Tourism



Who visits, why they come, market size and potential to attract

Based on all the research conducted in this project, five visitor segments emerged as prominent current and future target markets.

Winter Visitors. People who winter in Copper Corridor communities, the east side of Phoenix, or the north side of Tucson are a sizable market. Active winter residents are hiking, OHVing, horseback riding, visiting the state parks, and attending events, such as the Superior Home Tour.
Promotions: Auto Clubs, AARP, RV Parks, KOA magazine, AOT Webpage, Oracle Piano Society, events

Outdoor Recreationists. Includes residents and tourists, all ages and skill levels. The Arizona Trail, Aravaipa Canyon, and the overall landscape along the drive of 77 and 177 are spectacular, attracting all ages and skill levels. Working with public land agencies offers an opportunity to provide better way-finding signage and ensure easy access.
Promotions: AZ Highways magazine; outdoor stores which provide classes, trips, and citizen-led presentations; AZ Trails communications; HIKEAZ website; Tripadvisor; Channel 5 Phx Field Trip Fridays

Residents. With few overnight options, many residents are hosting friends and families in their homes. This offers an opportunity to keep the residents informed on things to see and do.
Promotions: visitor centers, local newspapers, newsletters, public or private building postings.

Event Attendees. Events draw a sizable number of tourists - over 50% for Apache Leap, Pioneer Days and Glow. At these events, food is a draw, producing an opportunity to specialize by featuring local, organic, homemade merchandise to draw more visitors.
Promotions: AOT calendar, fliers, press releases to Phoenix and Tucson magazines and newspapers

Millennials. The surveys indicate this is a small segment of Copper Corridor visitors and more research needs to be done to determine how to better attract this population.
Promotions: Online communities, craft breweries and food vendors, outdoor activities



Visitor centers

Copper Corridor communities operate three visitor centers that are recognized by Arizona Office of Tourism. Each center uses guest logs provided by AOT to count visitors. The results of research on three visitor centers in the Copper Corridor region provides possibly the best overview of tourists to the area.

	Superior Visitor Center	Superior Chamber Visitor Center	Oracle Visitor Center
Location	Along Highway 60 (west gateway)	Downtown	1470 W American Ave (across from fire station)
Months/Years of data	January 2013 to December 2015	October 2014 to September 2015	July 2014 (newly opened) to February 2016
Number of guest entries	2,838 entries (3 year period)	386 entries (1 year period)	656 entries (20 month period)
Month of highest visitation	March 2013 328 guests	February, 2015 68 guests	February, 2016 107 guests
% of visitor vs. resident	Visitor (88%) Resident (12%)	Visitor (70%) Resident (30%)	Visitor (47%) Resident (53%)
% visitors who stayed overnight in paid accommodations	20%	8%	19%
% visitors who stayed overnight with friends/relatives	26%	18%	19%
Demographics of Travel Party			
Male	37%	45%	40%
Female	23	28	35
Couple	37	26	24
Family	3	1	1
Adults in travel party (mean #)	2.2	2.0	1.8
Children in travel party (%)	27%	3%	3%
Top Countries of Origin/State			
Arizona	30%	62%	70%
Other USA	53	30	23
Canada	14	7	6
Other international	3	1	1

The Superior Visitor Center, located on Highway 60 receives a mix of visitors: Phoenix (70% of Arizona visitors), Tucson (5%), and residents from other parts of Arizona (25%). Oracle Visitor Center and Superior Chamber of Commerce, the two less visited visitor centers, receive visitors from the city closest to them (Tucson and Phoenix respectively).

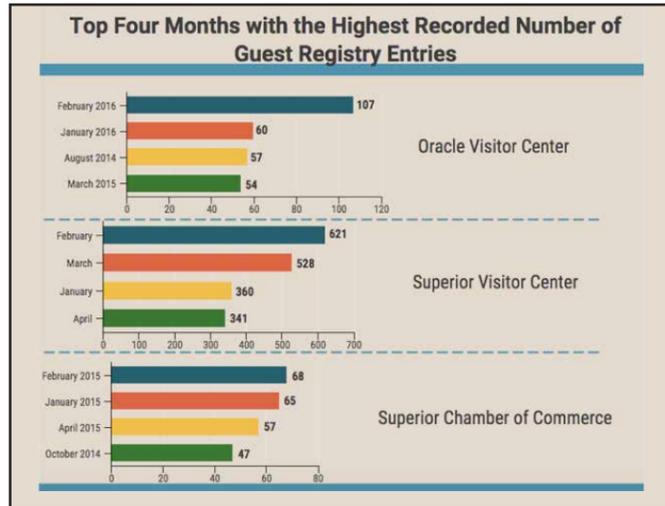
“With the collaboration of our partners, the Copper Corridor region has developed the tools it needs to become a dynamic tourist destination, benefiting businesses, residents and visitors.”

– Liz Harris Tuck, Project Leader, Copper Corridor Economic Development Coalition



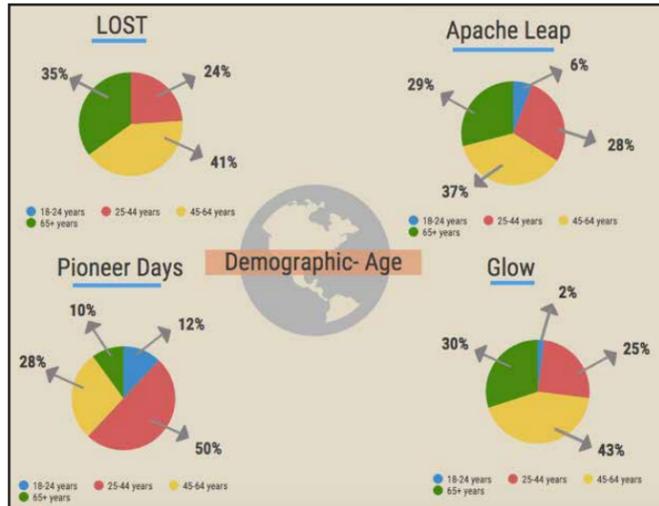
Findings

The depicted infographics display information from the guest registry log analyses, events, OHV, and AZ Trail. Each infographic captures information about the visitor's or user's interaction with the Copper Corridor region.



“This project benefits our communities by demonstrating the economic impact of tourism and highlighting attractions in the region.”

– Pete Rios, Pinal County Supervisor



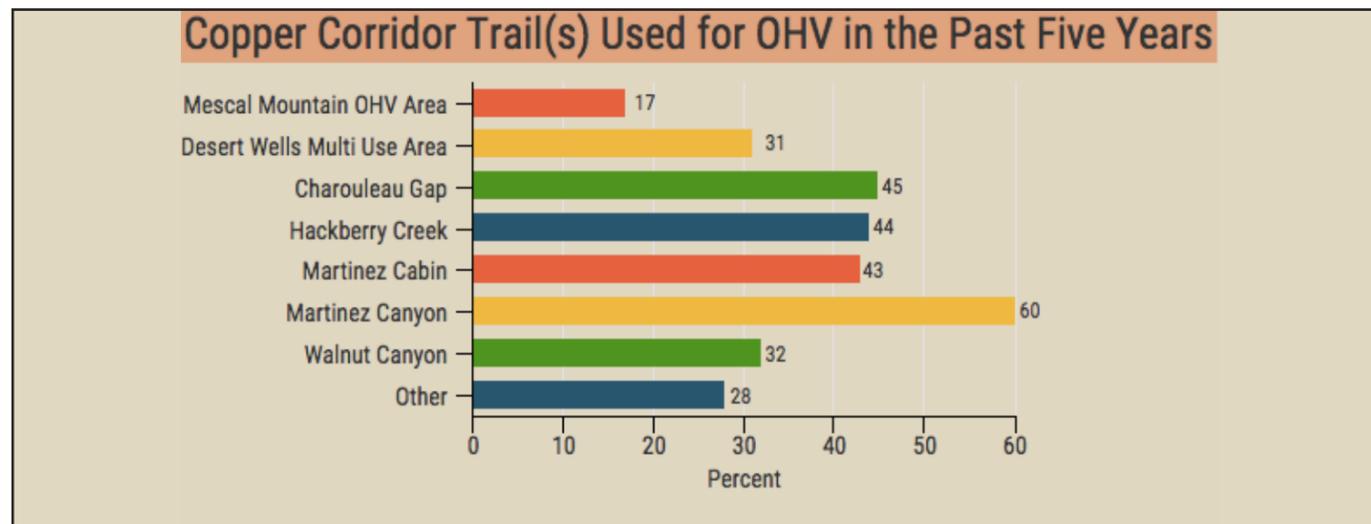
Off-highway vehicle riders

OHV riders who are members of various riding groups in the Phoenix and Tucson areas were surveyed. Almost 150 riders completed the survey and 96% had ridden in the Copper Corridor area in the past 12 months. Riding six or more times was the most common frequency (35% of riders) showing strong repeat visitors, while 12% were first time riders in 2016. The months of January and February are the peak months. The most popular areas are Martinez Canyon (60%), Charouleau Gap (45%), Hackberry Creek (44%) and Martinez Cabin (43%). Four-wheel drive vehicles are most commonly used in the Corridor (62% use) followed by motorcycles or dirt bikes (42% use) and ATVs (15%). The most popular information sources are the clubs' communications (44%) and word of mouth (31%).

Attractions and parks

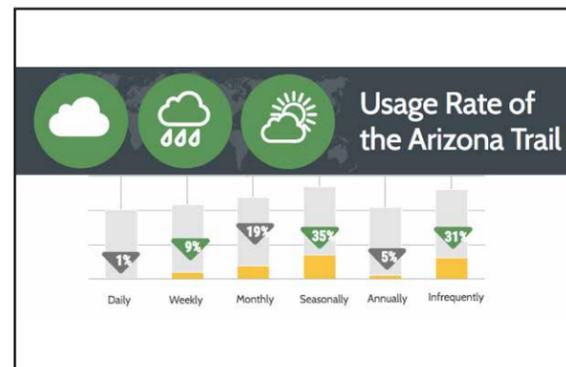
The Copper Corridor region has many spectacular places to visit. Two state parks – Boyce Thompson Arboretum and Oracle – are both day user areas featuring flora, fauna and history. Boyce Thompson, currently being operated through an arrangement with University of Arizona, has in several recent years hosted 75,000 to 86,000 annual visitors. Oracle State Park, with limited hours, hosts around 6,000 annual visitors. In 2015, both parks saw increases in their visitors with Boyce Thompson increasing 8.1% over 2014 and Oracle 10.8% for the same period. On the east side of the Phoenix metropolitan area, Tonto National Forest's 2.8 million acres is another gem drawing visitors to the area.

Near Superior is Oak Flat and the Apache Leap cliff formation. A campground area and a climbing area near Oak Flat draw recreationists. Aravaipa Canyon Wilderness area, between Winkelman and Oracle, is 19,000 acres with an additional 7,000 acres managed by The Nature Conservancy. Permits are required and only 50 people can enter the area each day. In 2015, the BLM reported just under 30,000 recreation uses to the area for hiking, backpacking, horseback riding, and wildlife viewing. Near Oracle is Biosphere 2, a museum operated by University of Arizona, where visitors can experience the world's largest earth science laboratory. This unique facility is internationally known and hosts 100,000 visitors each year including K-12 students and visitors from around the world (60% from out-of-state). The new Arizona Zipline Adventures, also located in Oracle, opened in early 2016 and is having great early success.



“Leaders in each of the communities are devoting their time and creativity to turn the Copper Corridor into the next popular destination for outdoor adventurers and small town cultural connoisseurs.”

– Dr. Christine Vogt, Tourism professor, Arizona State University



Hotel inventory

As tourism increases, the region should see more accommodation services. Currently, the towns of Superior, Kearny, Mammoth, San Manuel and Oracle have eleven properties with a total of 150 rooms. Camping is available at sites and in the backcountry in Tonto National Forest, in the Aravaipa Canyon Wilderness, Bureau of Land Management areas, and select private campgrounds. Boyce Thompson and Oracle State Parks do not offer camping.

Economics

Primary data collection completed in this regional study did not attempt any estimation of tourism spending or volume. The best economic data available for economic impact is Arizona Office of Tourism's county estimates. Pinal County, where the communities of the Copper Corridor reside, encapsulates several other communities with larger tourism systems. ASU's estimate of hotel rooms in the county is 2,400 with Casa Grande, along Interstate 10, having approximately 42% of the county's rooms. The 2,400 hotel rooms generate \$46.8 million in visitor spending at accommodation businesses (Dean Runyan Assoc. 2015 projected). Overall direct travel spending by tourists in Pinal County is estimated at over half a billion dollars (2015p \$568.1 million). This level of spending is estimated at having generated \$21.2 million in local (bed, city, and county) tax receipts and \$29.4 million in state tax receipts in 2015. ASU analyzed data including: 2,400 hotel rooms, at two average room prices \$67 and \$80, and two occupancy levels – 50% and 60%, and found the AOT estimates to be probable. Based on Northern Arizona University's Bed Tax Rate report as of January 2016, a bed and/or city tax is charged on tourism spending in Kearny (3%, 3%) Superior (0%, 4%) and Mammoth (4%, 4%) in addition to the county tax of 1.198% and state tax of 5.5%. Unincorporated Oracle and San Manuel do not have a bed or city tax at this time.

Employment levels in Pinal County are estimated by Dean Runyan Associates at 6,010 jobs at \$147 million in earnings that are generated by travel spending. Most jobs are in accommodations and food service (3,650 jobs), followed by the arts, entertainment and recreation sector (1,350 jobs).

Next steps

The planning and research effort completed in mid-2016 sets the stage for completion of a regional tourism marketing plan by the Copper Corridor Economic Development Coalition.

Involvement of the business community is critical. The current working group of the coalition has several business attendees. Greater involvement by mining businesses, and other businesses and foundations can yield additional partnerships for downtown redevelopment, beautification, or technical business assistance.

Continued partnering with government and nonprofit organizations, such as Local First Arizona, that provide or support tourism and recreation activities is essential. Regular communications and meeting invitations are needed to keep all stakeholders informed and involved. The public land agencies, such as U.S. Forest Service (Tonto National Forest) and Bureau of Land Management, play a major role in public access for recreation and future development and maintenance of facilities like trails and campgrounds.

Securing funding to staff a regional tourism position and implement the marketing plan will be critical to advancing community and regional tourism and recreation growth.

The marketing plan will further outline product development ideas and promotional strategies to reach tourists who most likely will be full-time residents from Phoenix and Tucson, inbound out-of-state or international tourists, and winter visitors. Product development should focus on adding events across the communities that feature arts, heritage and outdoor recreation. Promotions should include printed materials for distribution in the three visitor centers and other community locations such as state parks, hotels, campgrounds, and retail stores, as well as other information centers across the state willing to distribute. Promotions must also include an informative and current website, an e-mail function for event invitations, a Facebook page, and any other emerging online sites. Banner advertising in printed media, such as the featured Edible Baja Arizona, can keep advertising costs down and impacts high. Online activities like encouraging blogs, picture posting, sharing of experiences, and spontaneous event staging are all growing in marketing reach and are highly used by millennials. Publicity with media outlets, coupled with familiarization trips, have the potential to reach new markets and keep the Corridor in consumers' minds.

Training on web-based marketing of businesses and other tourism and recreation operators in the Copper Corridor is essential. The current project assembled a "how-to" guide to free and paid marketing with Arizona Office of Tourism's marketing programs as a tool to reach larger and more geographically dispersed tourist markets. This training will be implemented in Fall 2016.



Acknowledgments

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- Sam Hosler, Mayor, Kearny
- Sirena Dufault, Arizona Trail Association
- Colleen Floyd, Arizona Office of Tourism Research Manager

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