



North Central Region 2018 Year-End Data Review

October 23, 2019





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Agenda

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

Presentation slides available at:

<http://tourism.az.gov/regional-profiles/>



Regional Profiles

<http://tourism.az.gov/regional-profiles/>



Primary Research Partners



- Visitor profile
- Domestic travel only
- Continuous nationally representative online survey
- Delivered annually
- Regional visitor volume
- Visitor origins
- Visitor demographics
- Activities participated
- Average per party spending
- State and regional level



- Economic impact of travel
- Econometric model
- Domestic and international spending
- Delivered annually
- Jobs, earnings, taxes generated
- Spending by accommodation type
- Spending by commodity purchased
- Regional, county, and legislative district-level data



- Visitor volumes estimated via an econometric model
- International visitation (delivered annually)
- Domestic visitation (delivered quarterly)
- Multiple data points to estimate state visitor volume
- State level only



- Visa® card spending data
- International travel only
- Delivered quarterly and annually
- Spending by country, market segment, market category
- Seasonal spending
- State and regional level



Economic Impact of Travel 2018

North Central Region



Visitor Spending & Economic Impact

<http://tourism.az.gov/economic-impact/>



Arizona Travel Impacts 2000-2018

Arizona Office of Tourism commissions an annual study to examine the economic impact of the travel industry in the state and presents the updated data at the annual [Governor's Conference on Tourism](#). The following reports detail the impact of the travel industry to the state and each of its five regions and fifteen counties. The second report presents the same information by legislative district.

[Arizona Travel Impacts 2000-2018](#)

[Arizona Travel Impacts by Legislative District 2000-2018](#)

2018 Arizona Tourism Industry Performance

45.5 million
Overnight Visitors
Up 3.5% YOY



\$24.4 billion
Direct Spending
Up 7.8% YOY

2018 North Central Region Tourism Industry Performance

6.1 million
Domestic Overnight
Visitors



\$1.25 billion
Direct Travel Spending



Regional Impacts, 2018

North Central Region



\$1.25 Billion

Up 9.0%

Direct Travel Spending



12,790

Up 3.1%

Jobs



\$112 Million

Up 10.9%

State and Local Taxes



\$351 Million

Up 9.7%

Earnings



County Impacts, 2018

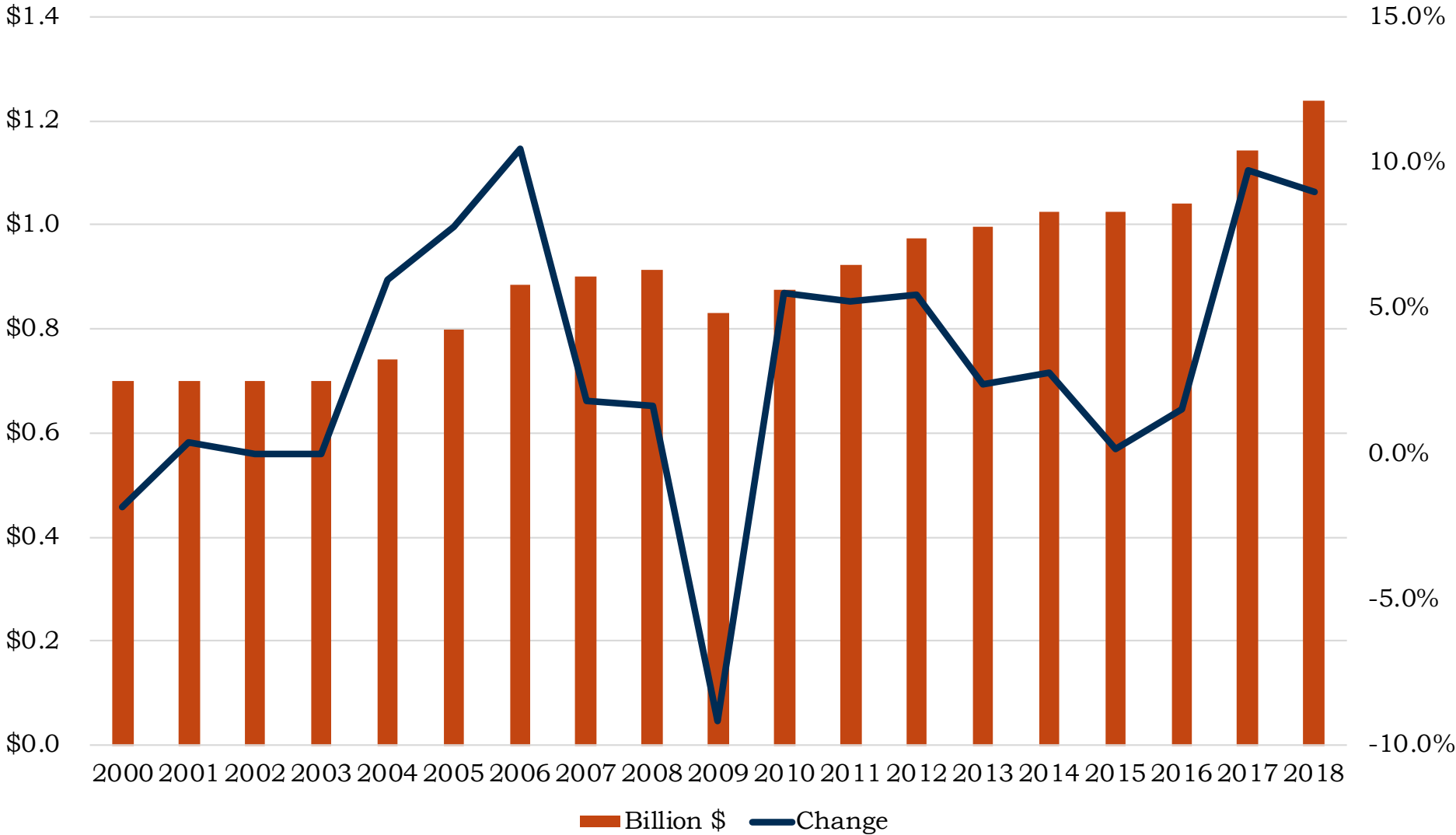
North Central Region

	Direct Travel Spending (\$million)	Jobs	Earnings (\$millions)	State and Local Taxes (\$millions)	Tax Revenue per Household
Gila	\$297	2,880	\$82	\$23.6	\$1,060
YOY % change	0.8%	-0.8%	5.2%	3.5%	
Yavapai	\$949	9,910	\$269	\$88.3	\$880
YOY % change	11.9%	4.2%	11.1%	12.6%	



Regional Direct Travel Spending

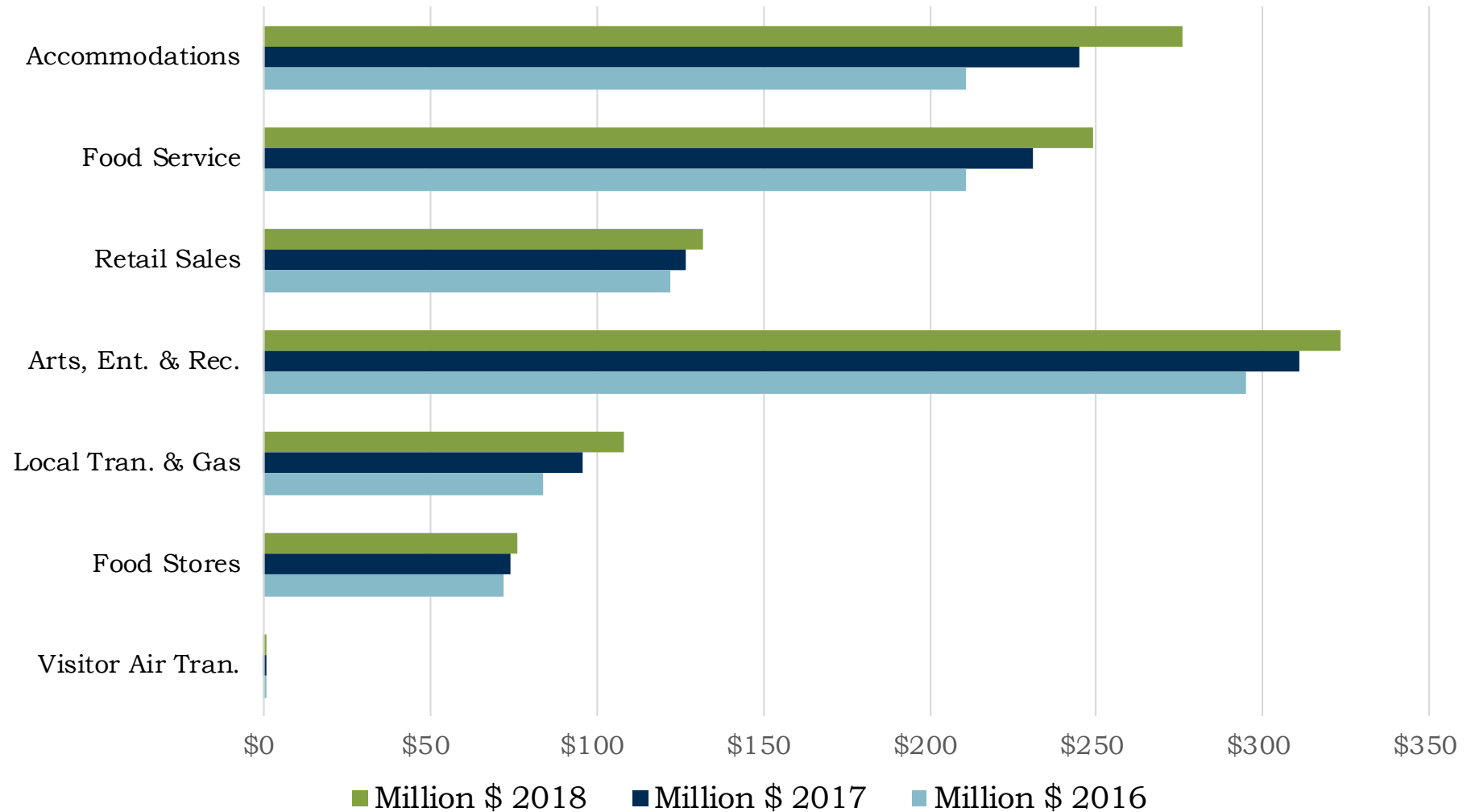
North Central Region



Source: Dean Runyan Associates

Spending by Commodity Purchased

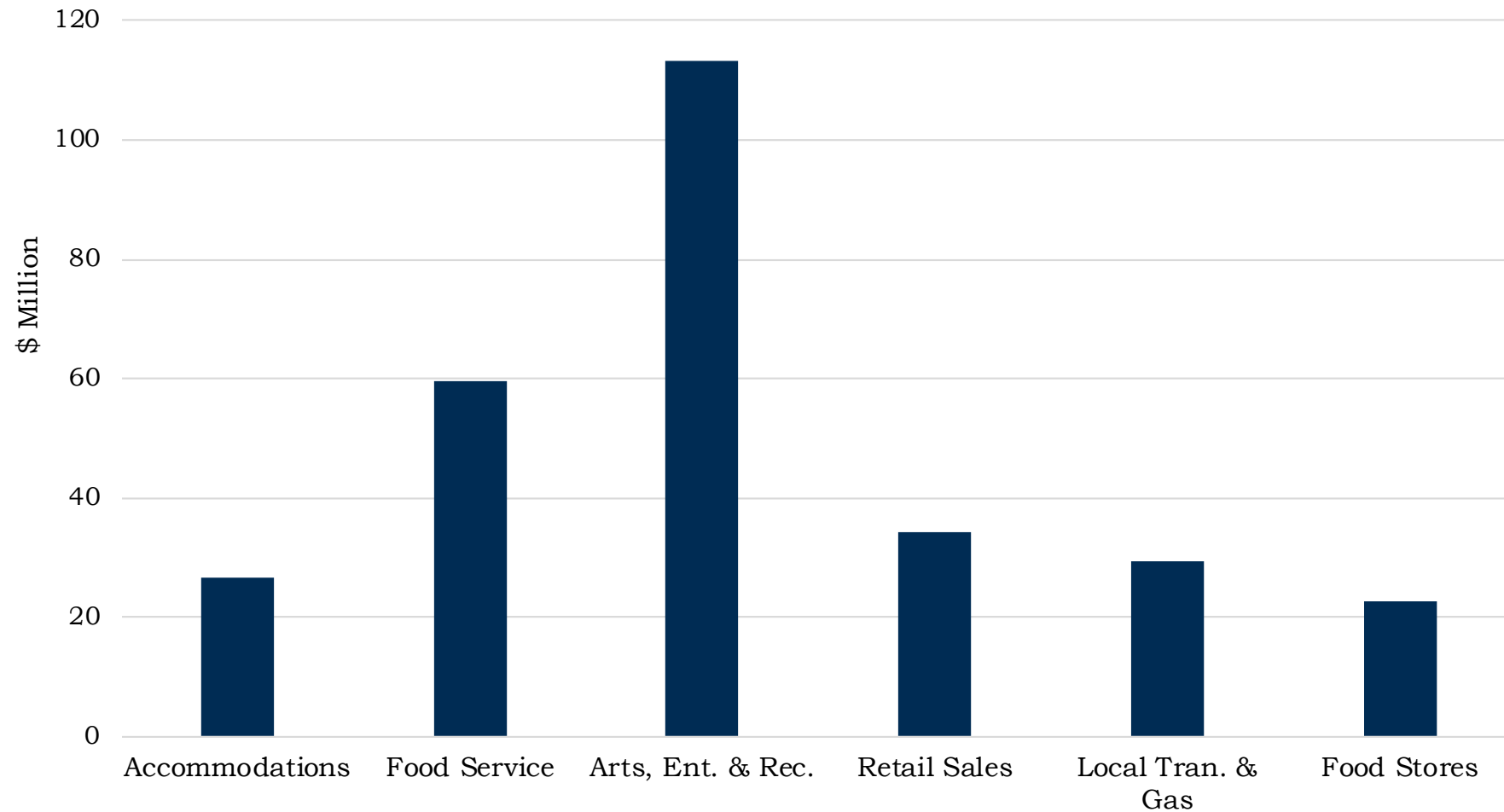
North Central Region



Source: Dean Runyan Associates

Spending by Commodity Purchased

Gila County

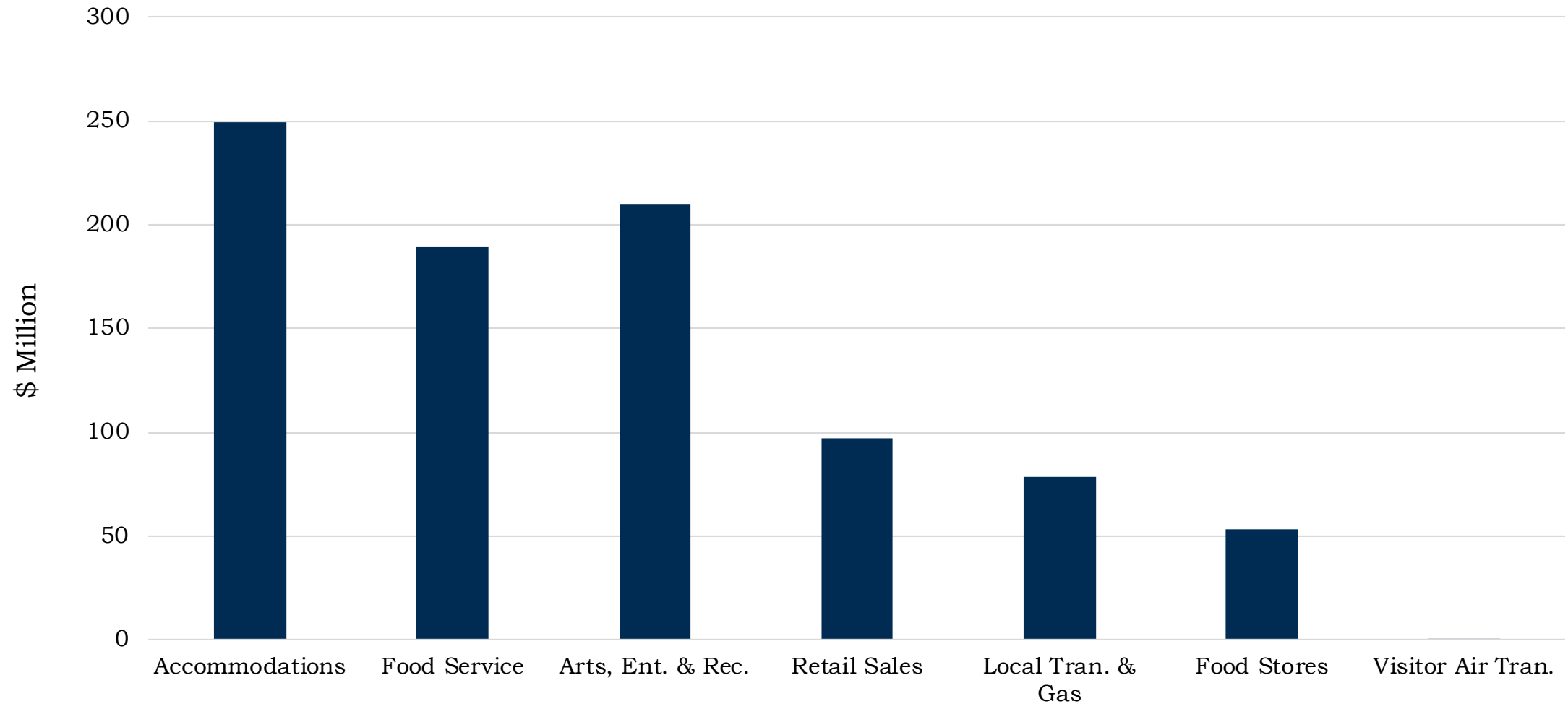


Source: Dean Runyan Associates, 2018



Spending by Commodity Purchased

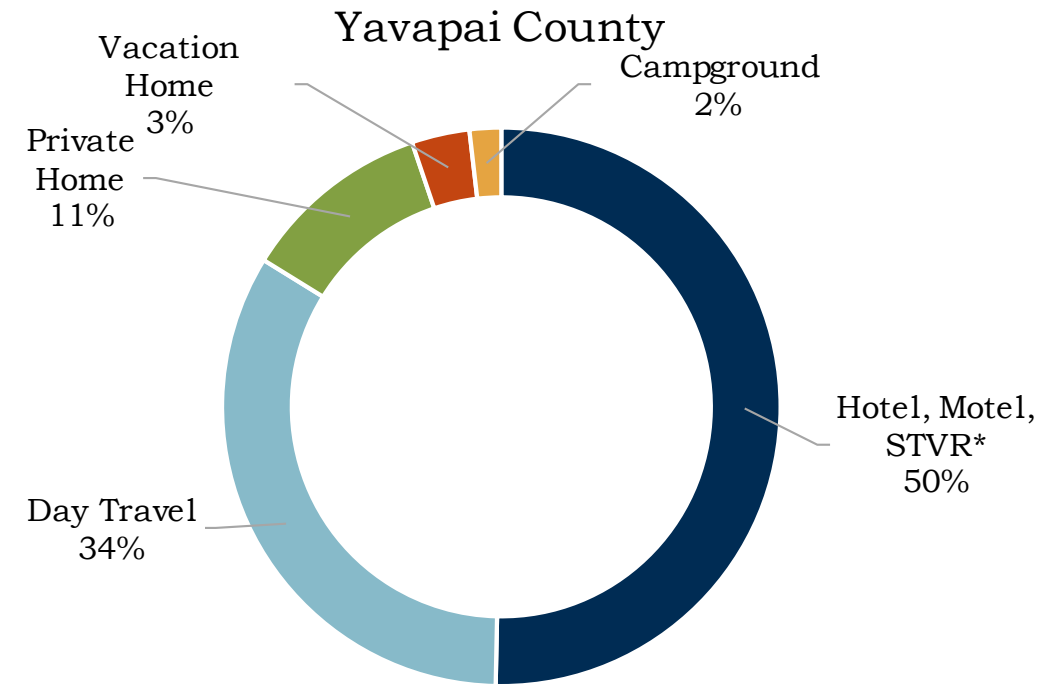
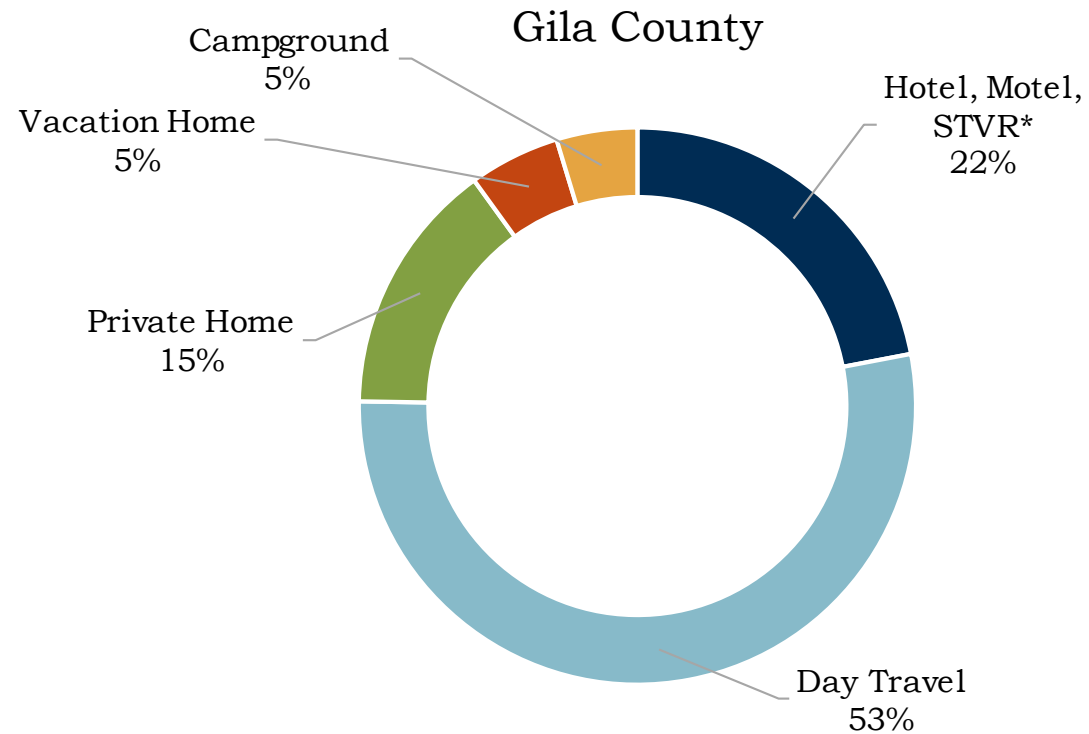
Yavapai County



Source: Dean Runyan Associates, 2018

Spending by Type of Accommodation

North Central Region





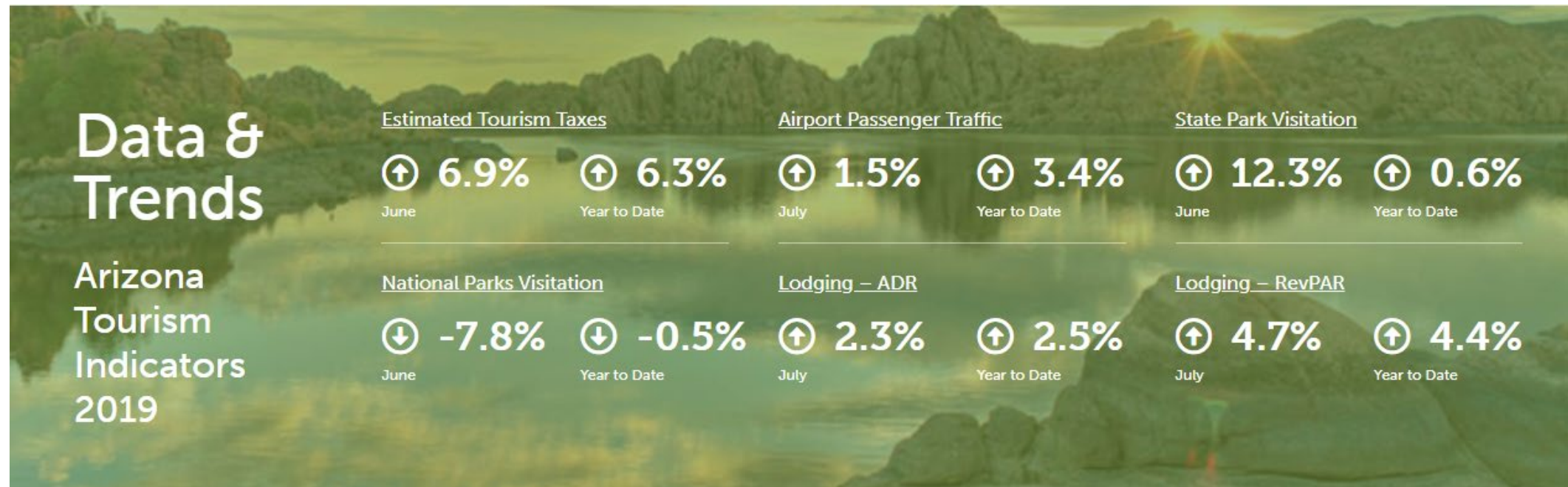
2019 Tourism Indicators To-Date

North Central Region



Tourism Indicators

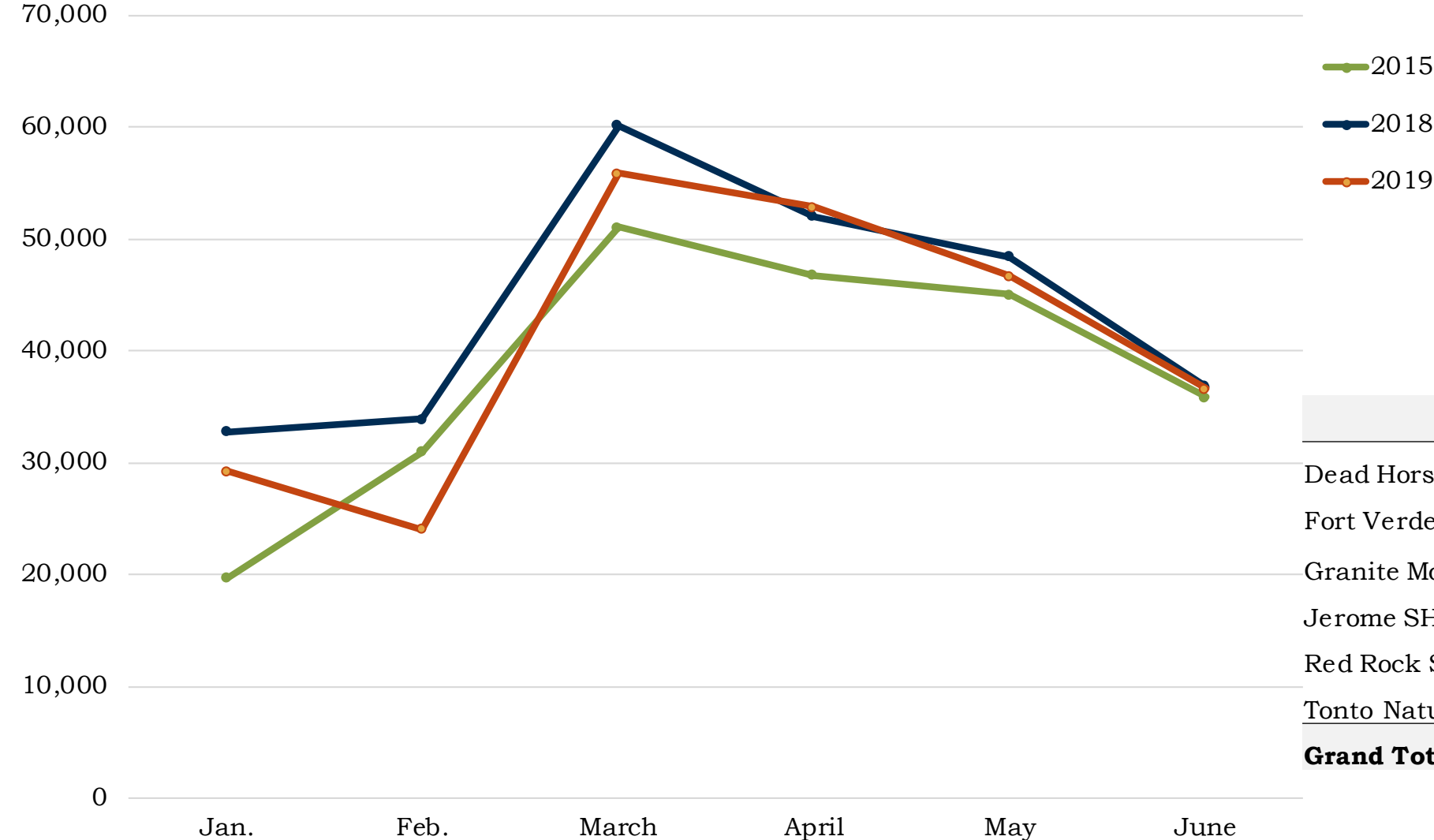
<http://tourism.az.gov/data-trends/>





State Park Visitation

North Central Region



Jan.-June YTD Visitation

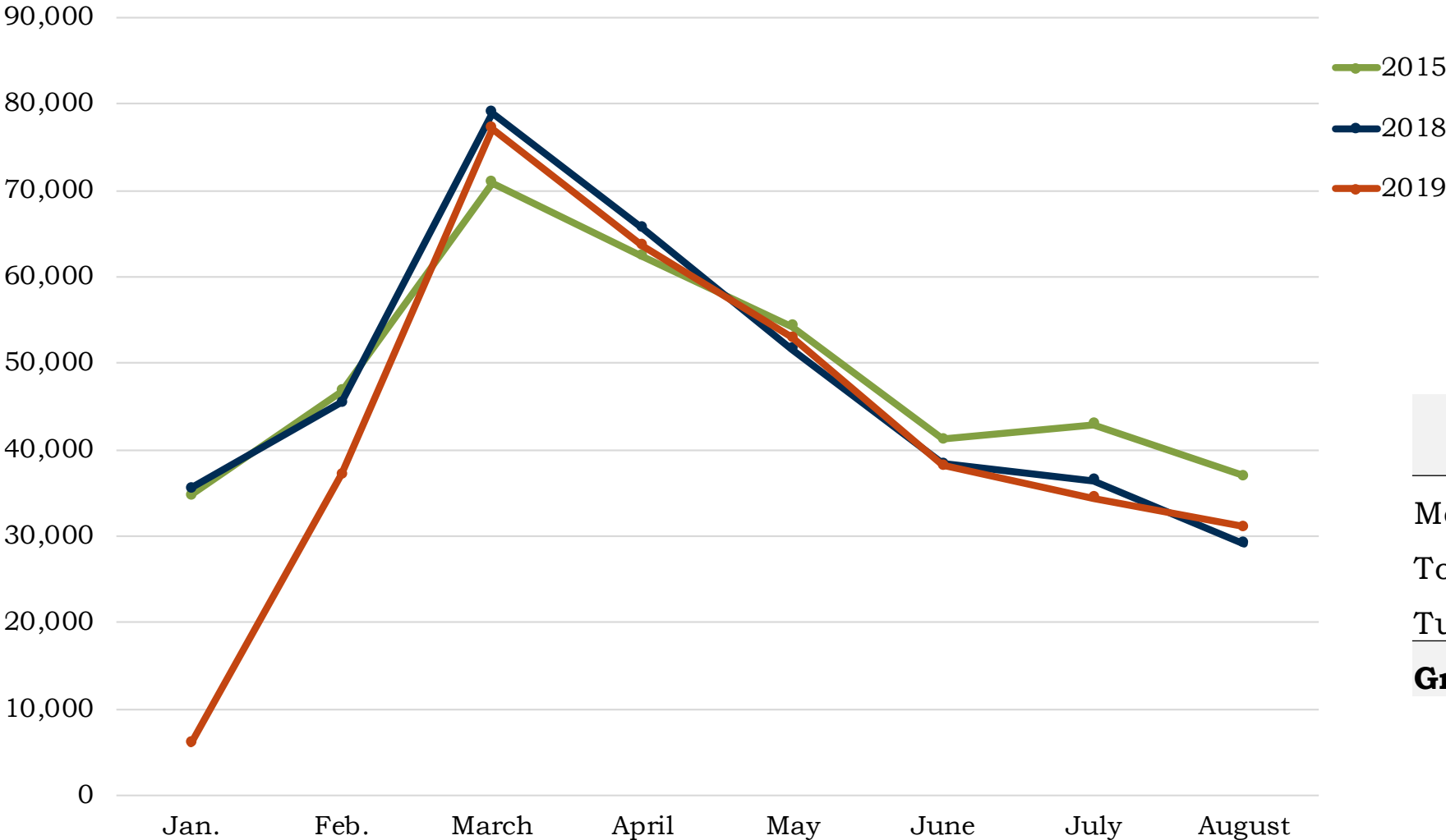
	2019 YTD
Dead Horse Ranch SP	103,420
Fort Verde SHP	6,142
Granite Mountain Hotshots MSP	16,489
Jerome SHP	28,405
Red Rock SP	45,835
Tonto Natural Bridge SP	45,065
Grand Total	245,356

Source: Northern Arizona University, Arizona State Parks



National Park Visitation

North Central Region



Jan.-August YTD Visitation

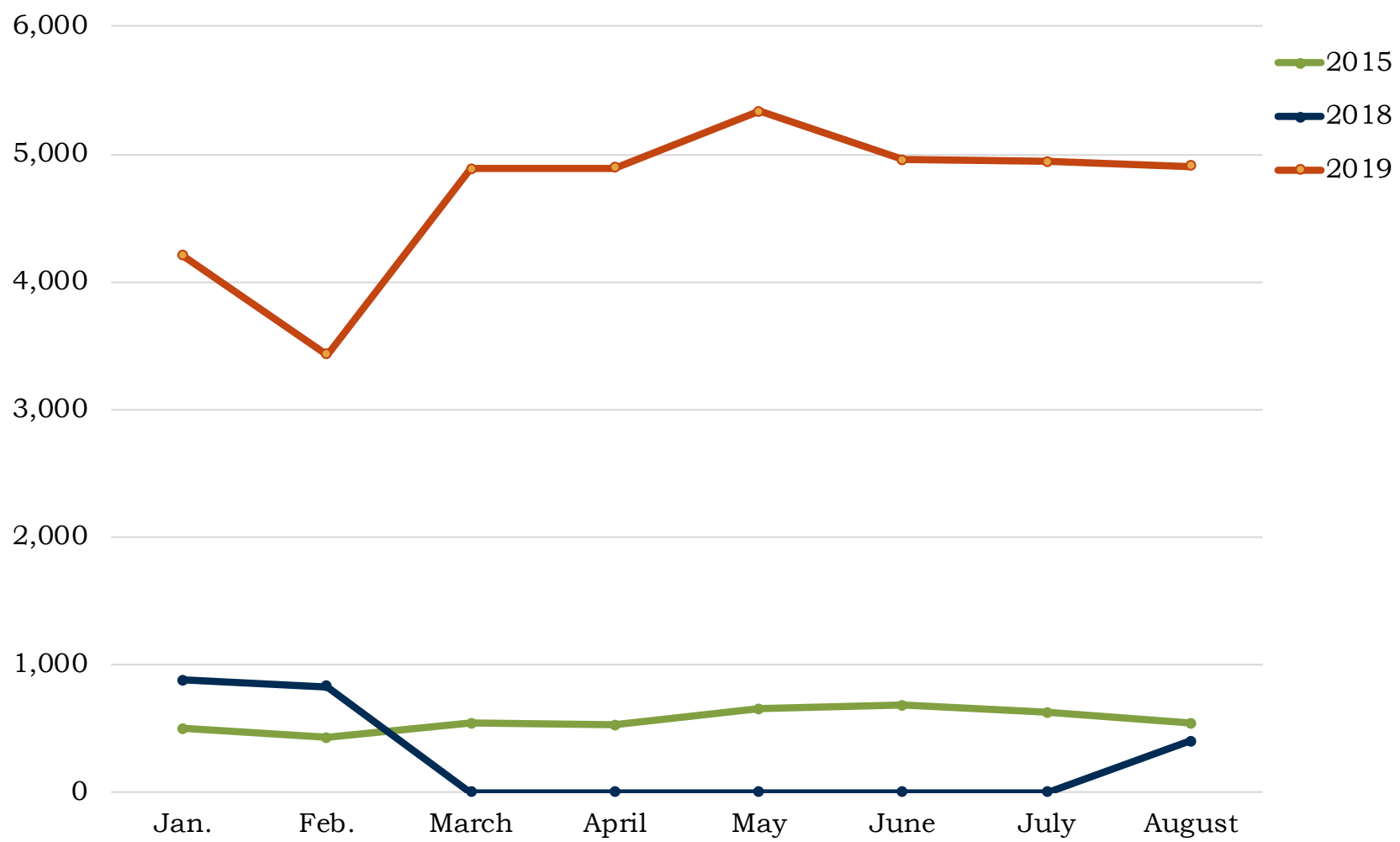
	2019 YTD
Montezuma Castle NM	254,259
Tonto NM	21,224
Tuzigoot NM	65,178
Grand Total	340,661

Source: Northern Arizona University, National Park Service



Airport Passenger Volume

North Central Region

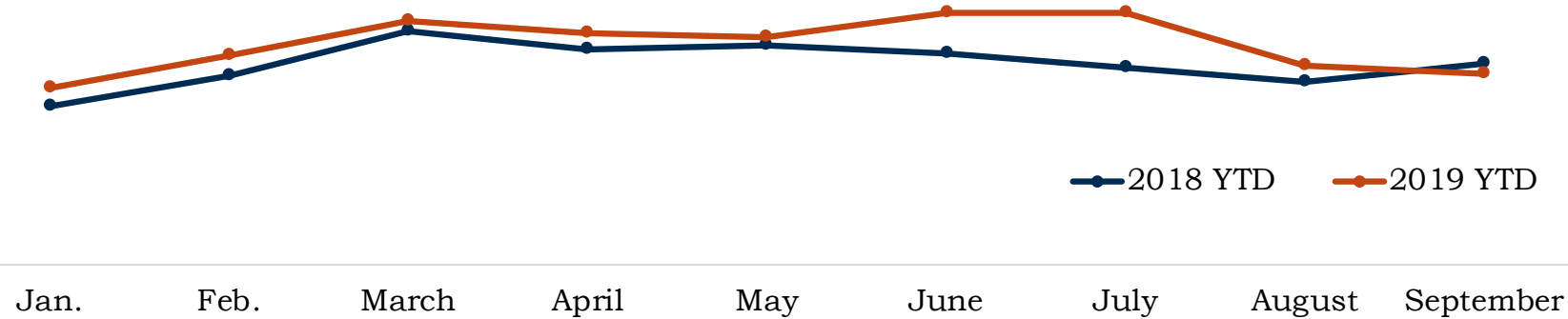


Jan.-August YTD Volume	
	2019 YTD
Prescott Regional	37,550



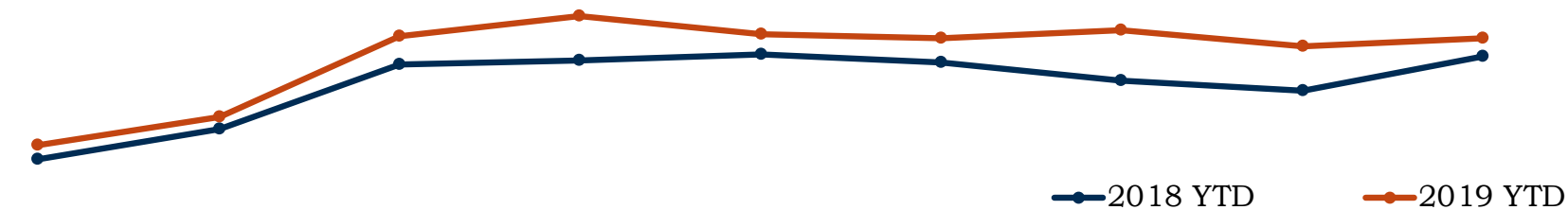
Lodging Indicators

Gila County



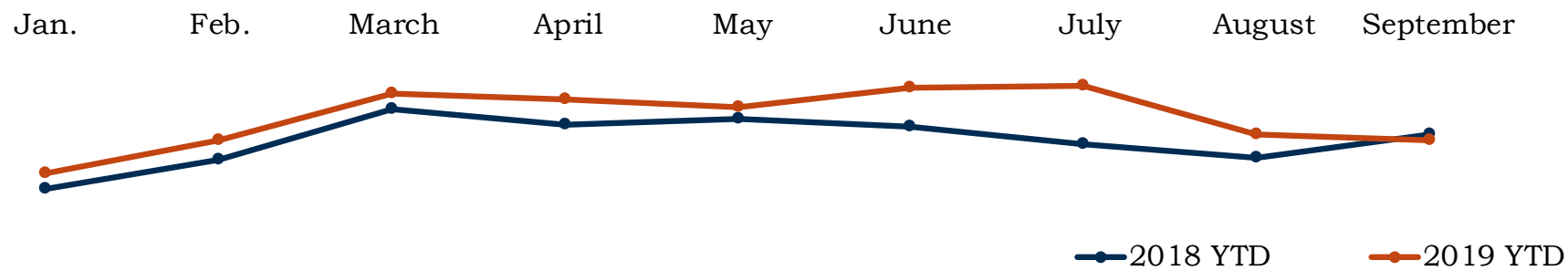
Occupancy

YTD Change = 9.6%



ADR

YTD Change = 3.6%



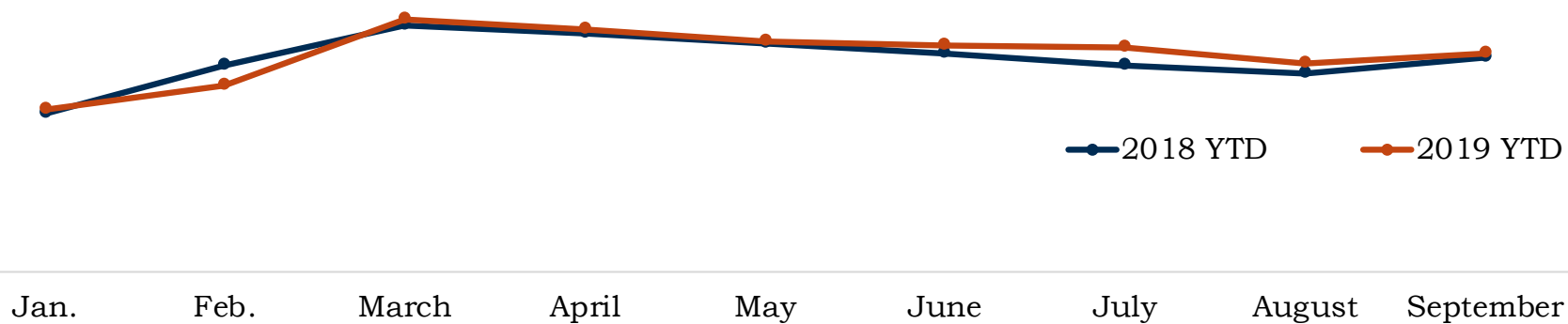
RevPAR

YTD Change = 13.6%



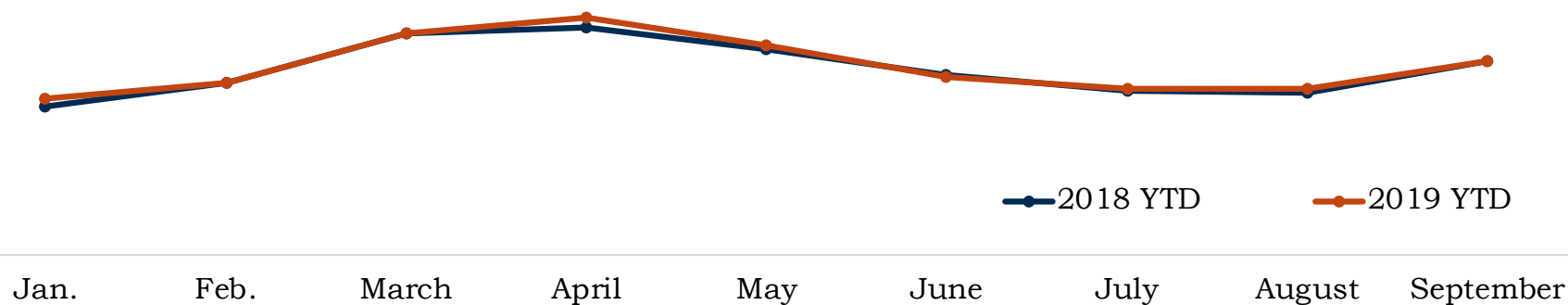
Lodging Indicators

Yavapai County



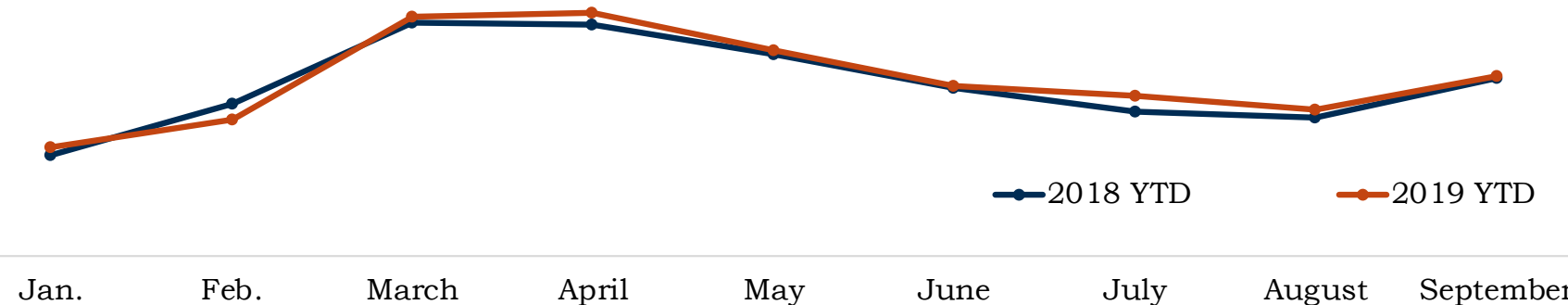
Occupancy

YTD Change = 1.8%



ADR

YTD Change = 0.9%



RevPAR

YTD Change = 2.7%



Gross Sales

<https://nau.edu/economic-policy-institute/data/>

Monthly gross sales data



Monthly Gross Sales data is produced by the Arizona Department of Revenue; Hospitality-related sales in four categories are provided below: Hotel/Motel, Restaurant/Bar, Amusement and Retail. These sales are reported for the State overall and by County.

[Arizona Counties-Gross Sales by Sector 2019 vs 2018](#)

[Arizona Gross Sales: 2006-2018](#)

[Apache County: 2006-2018](#)

[Cochise County: 2006-2018](#)

[Coconino County: 2006-2018](#)

[Gila County: 2006-2018](#)

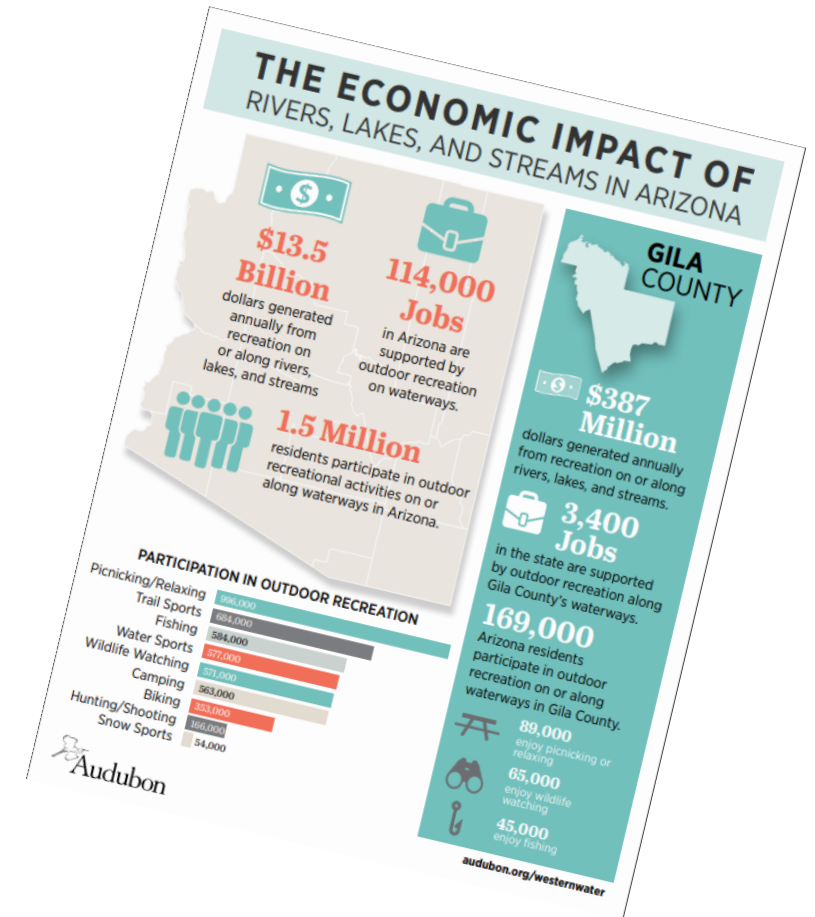
[Graham County: 2006-2018](#)

[Greenlee County: 2006-2018](#)

[La Paz County: 2006-2018](#)

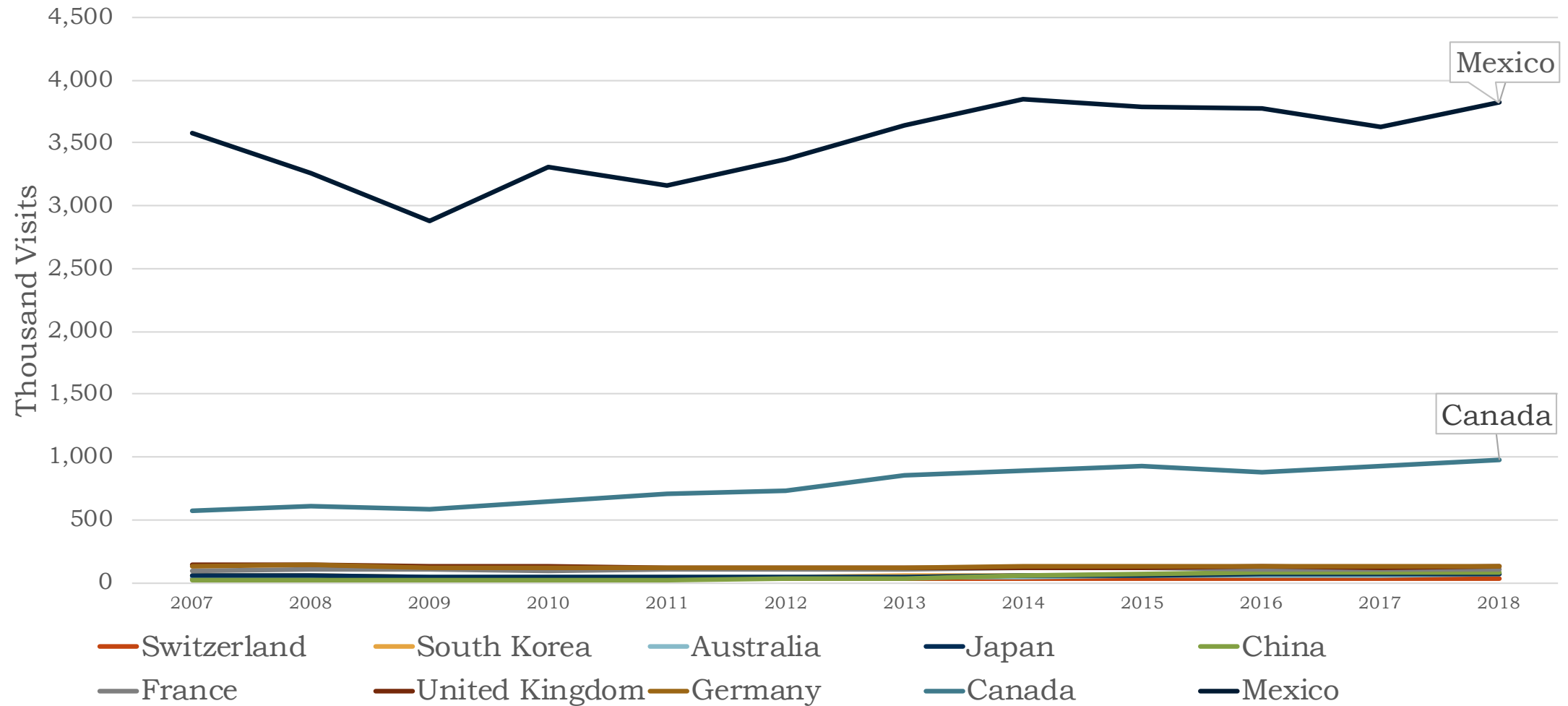
Additional Data Sources

- Arizona State Parks – visitor studies by park
- Audubon Arizona – [The Economic Impact of Arizona's Rivers, Lakes and Streams](#)
- National Park Service - [Economic Contributions of National Park Visitor Spending](#)



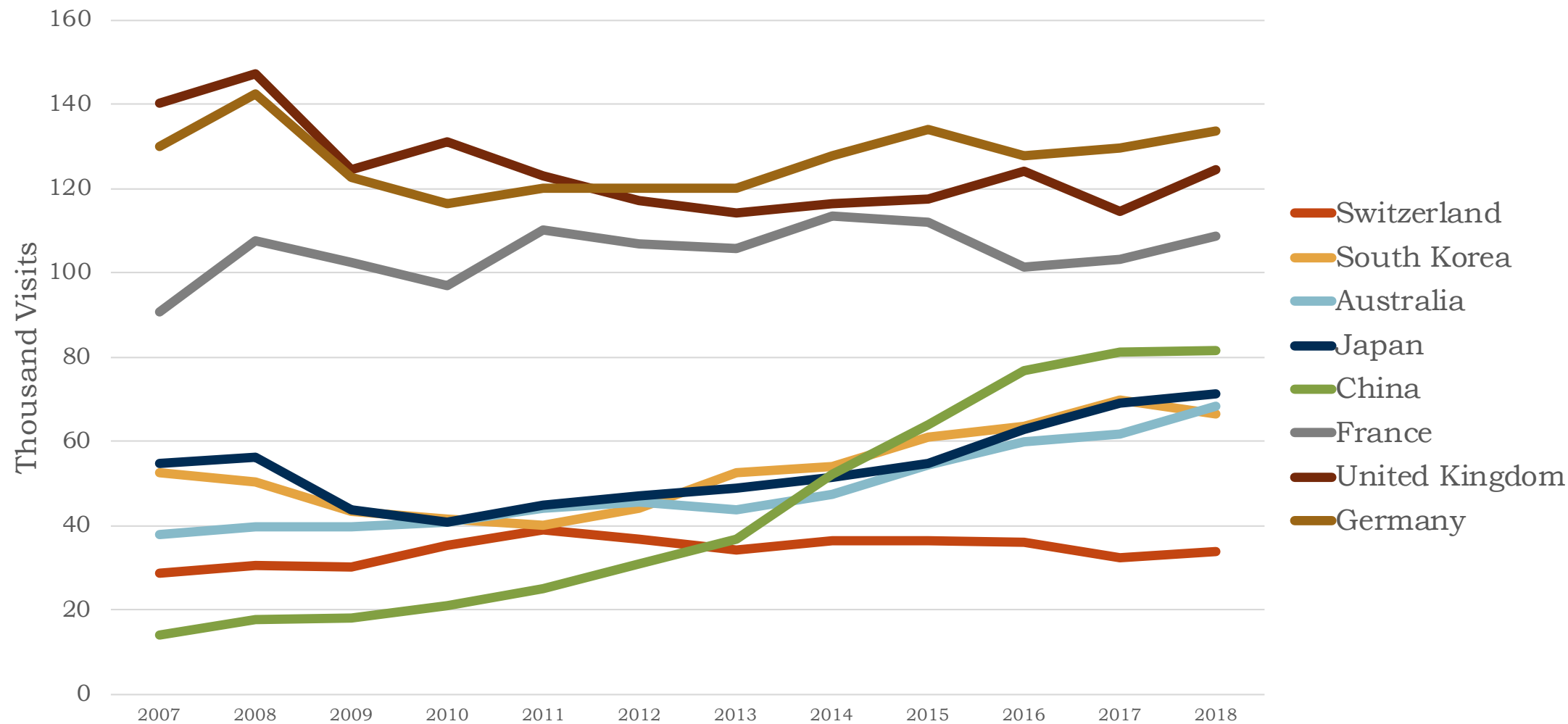
International Visitation

Visitation to Arizona Trend





Visitation to Arizona Trend

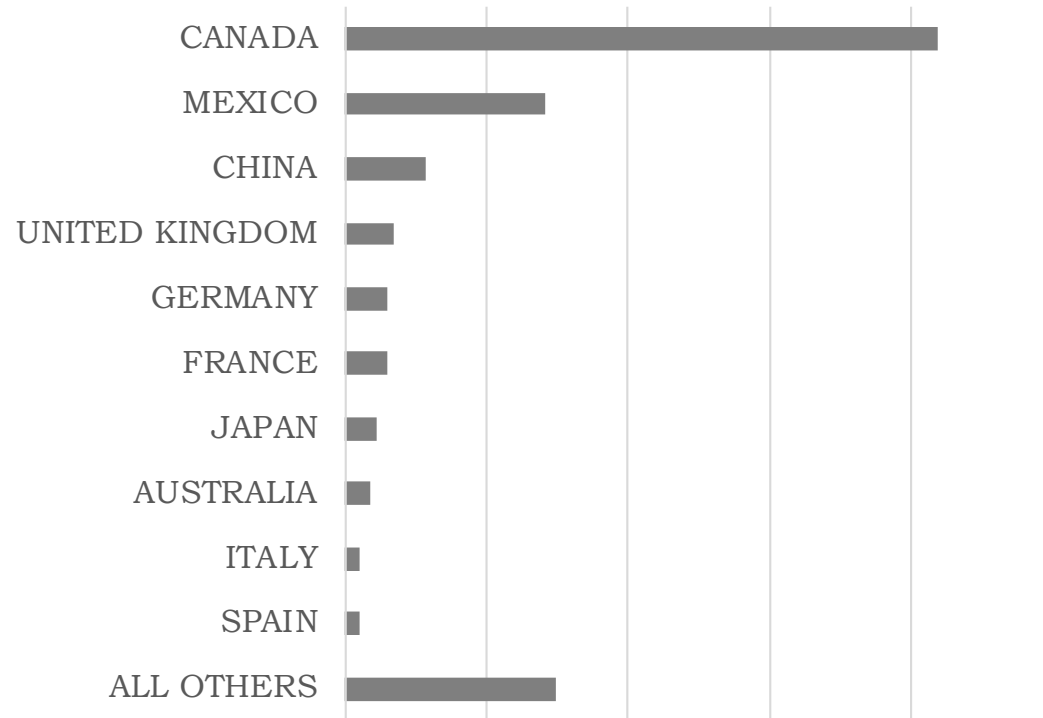


Source: Tourism Economics

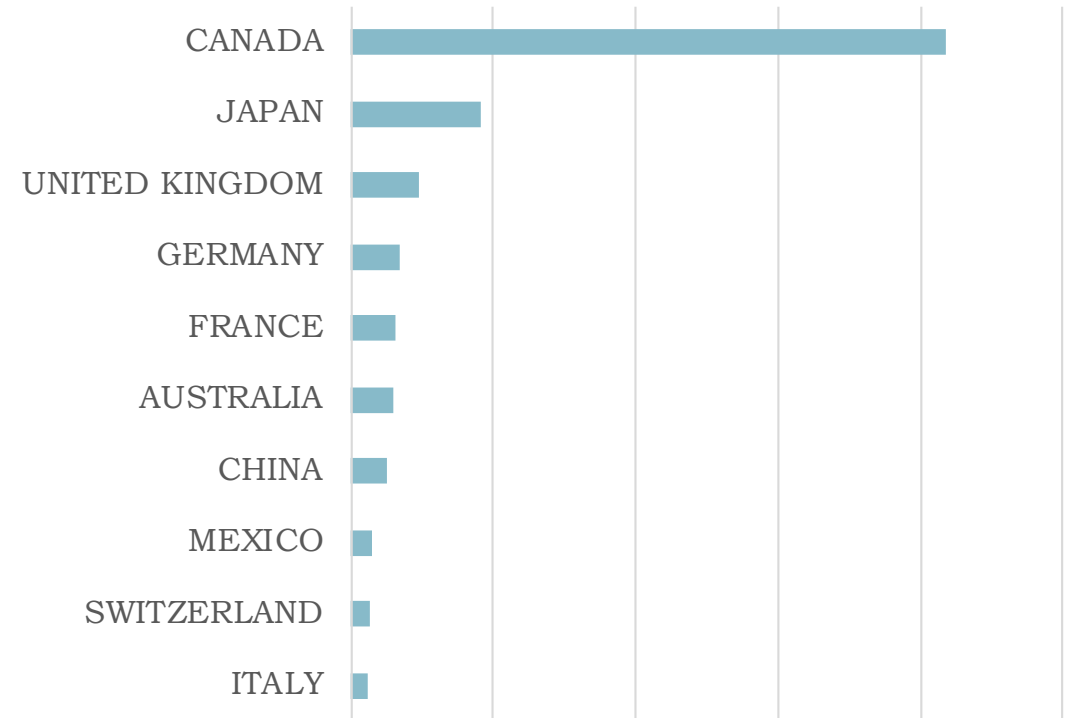


Visa Card Spending

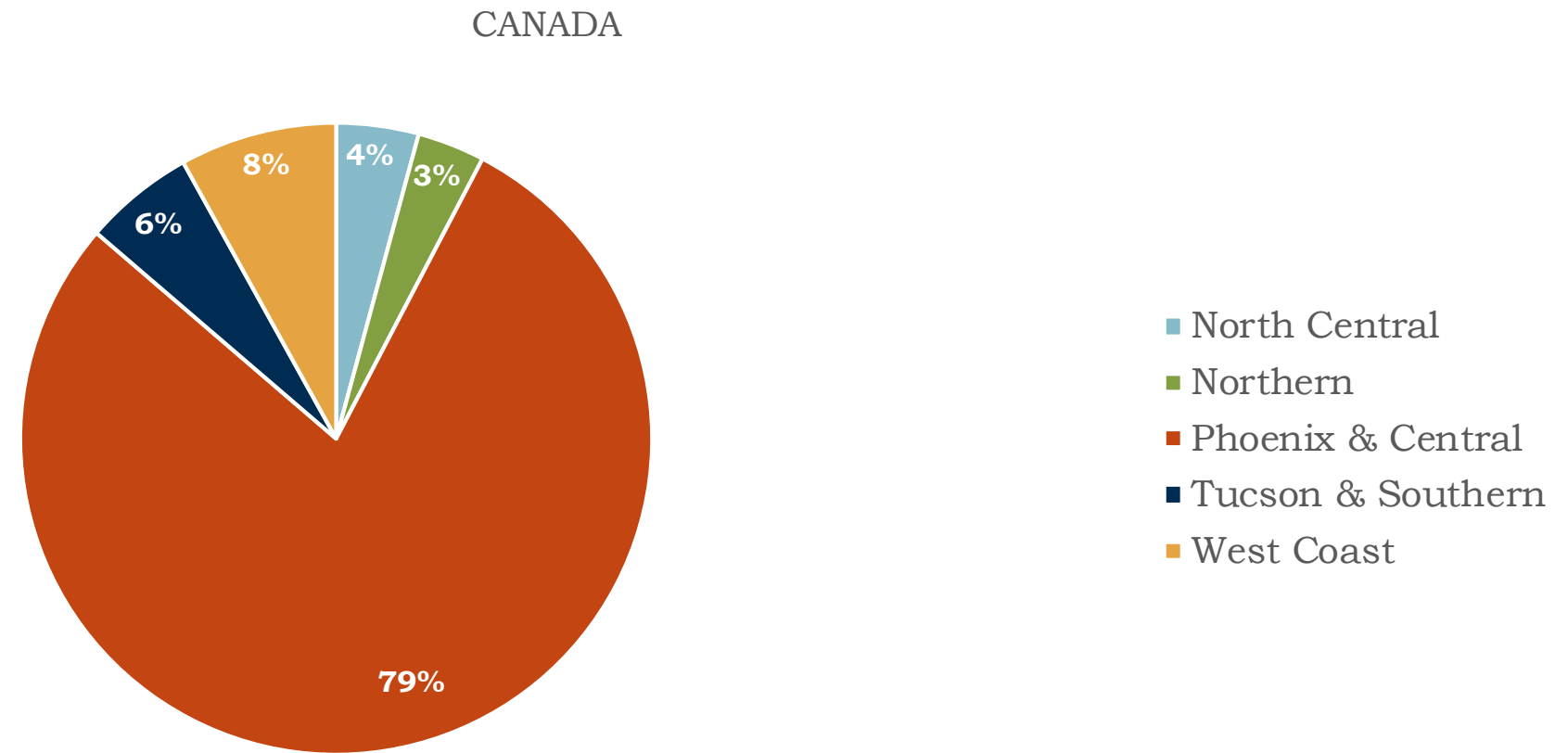
Arizona



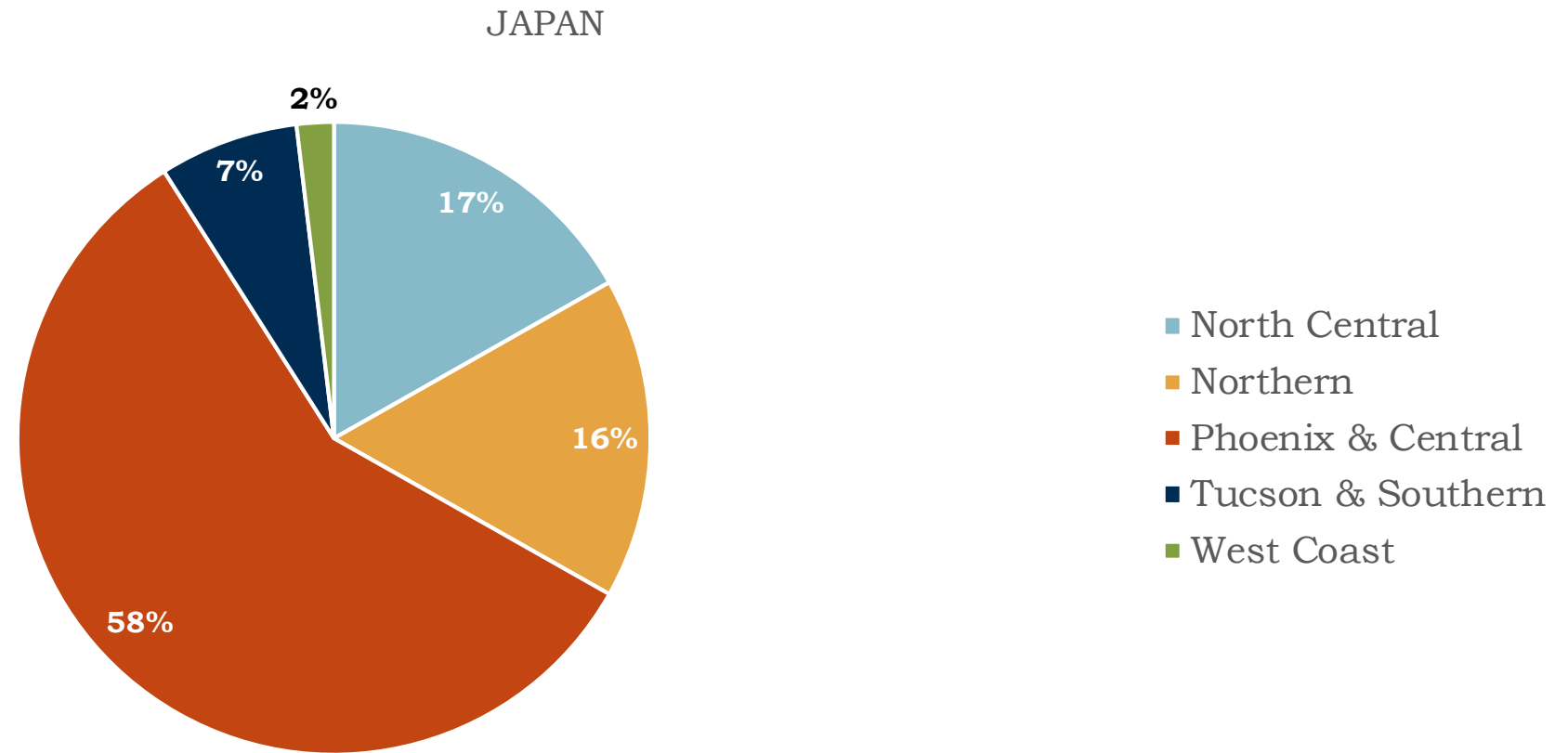
North Central Region



Where do visitors spend the most?

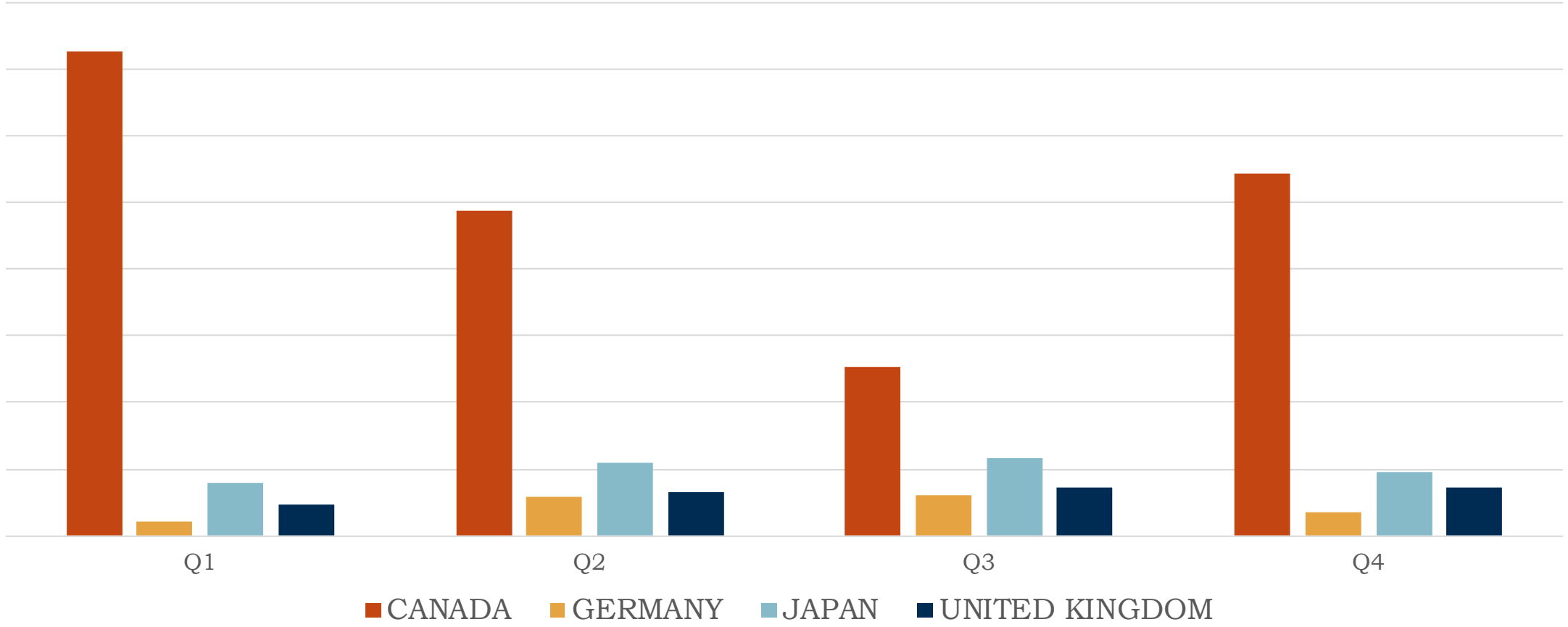


Where do visitors spend the most?





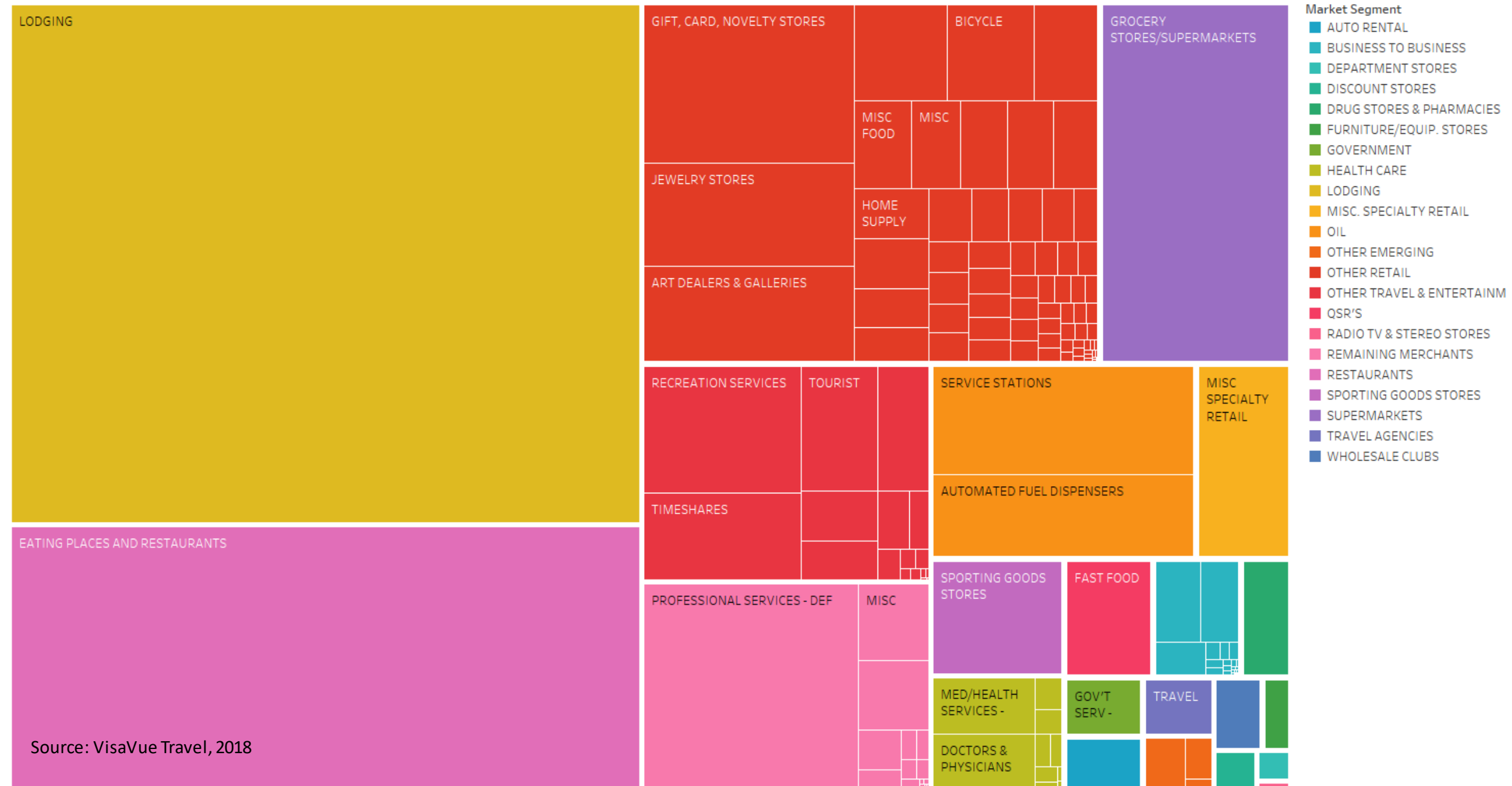
Seasonal Spending



Source: VisaVue Travel, 2018

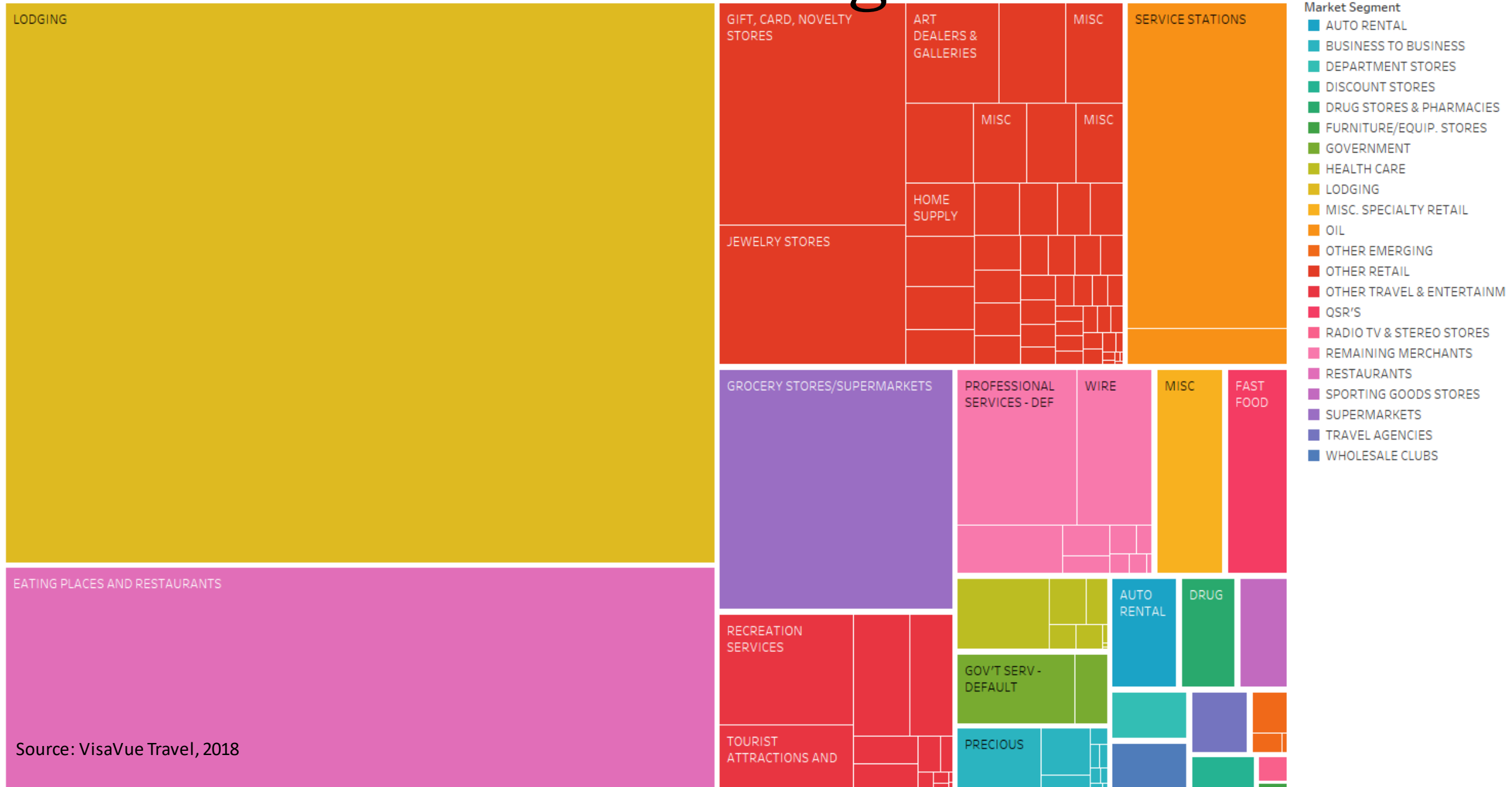


Canada



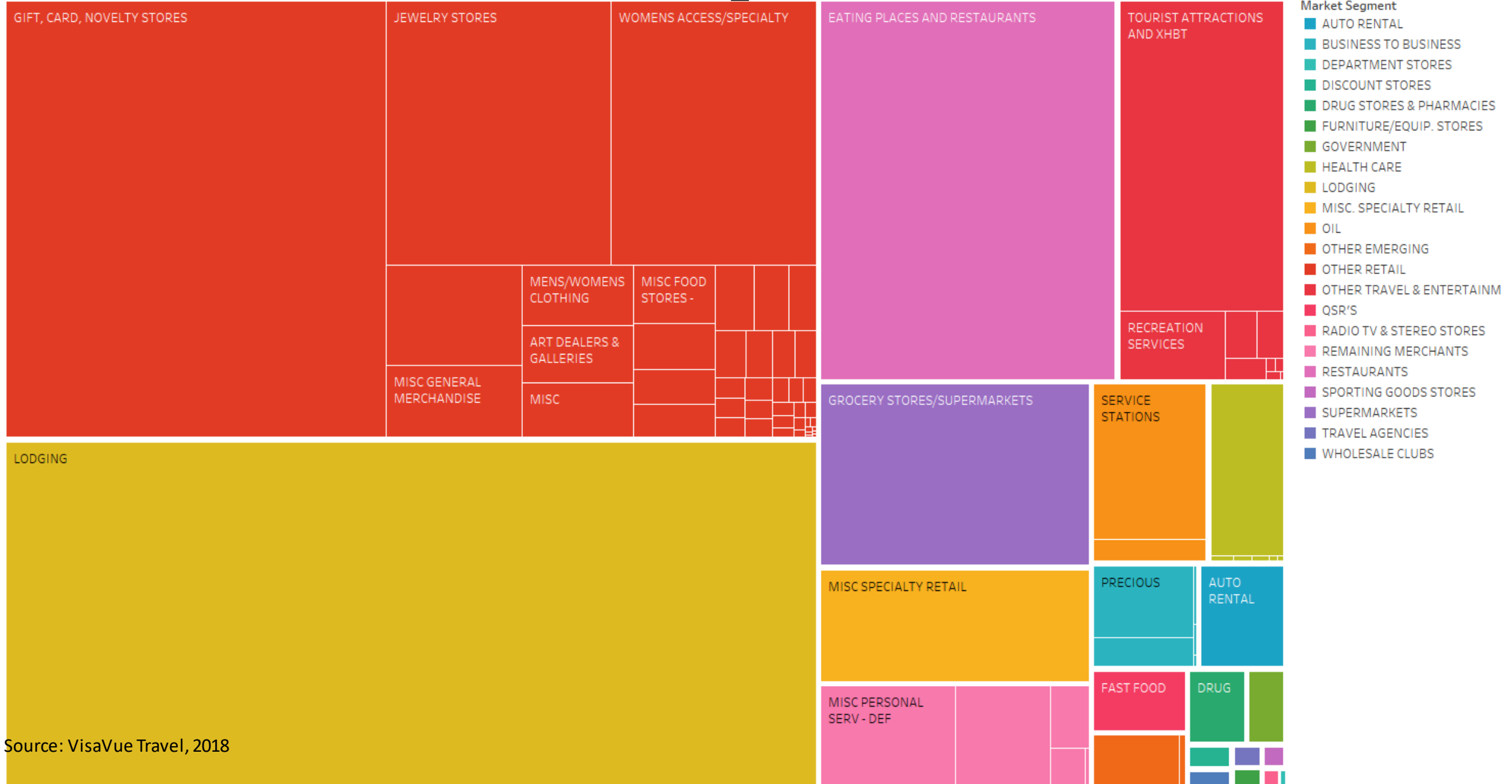


United Kingdom





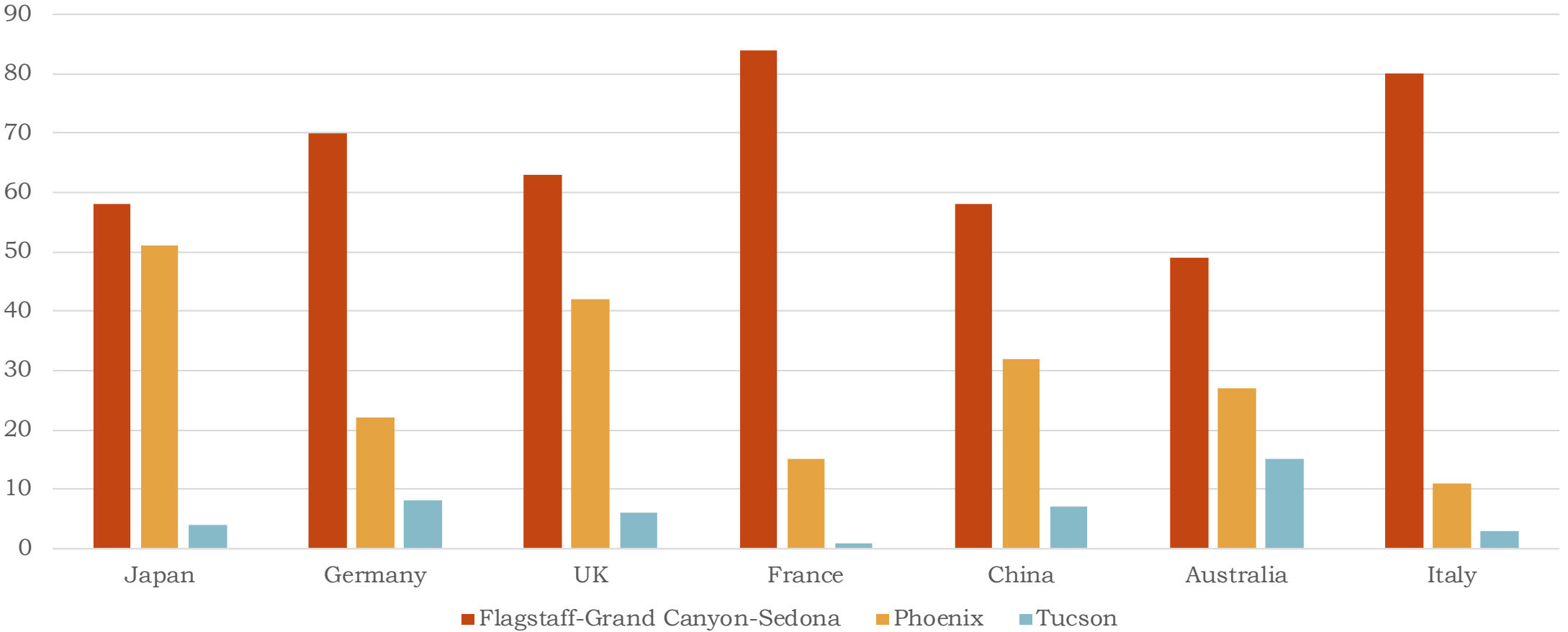
Japan



Source: VisaVue Travel, 2018



Arizona Destinations

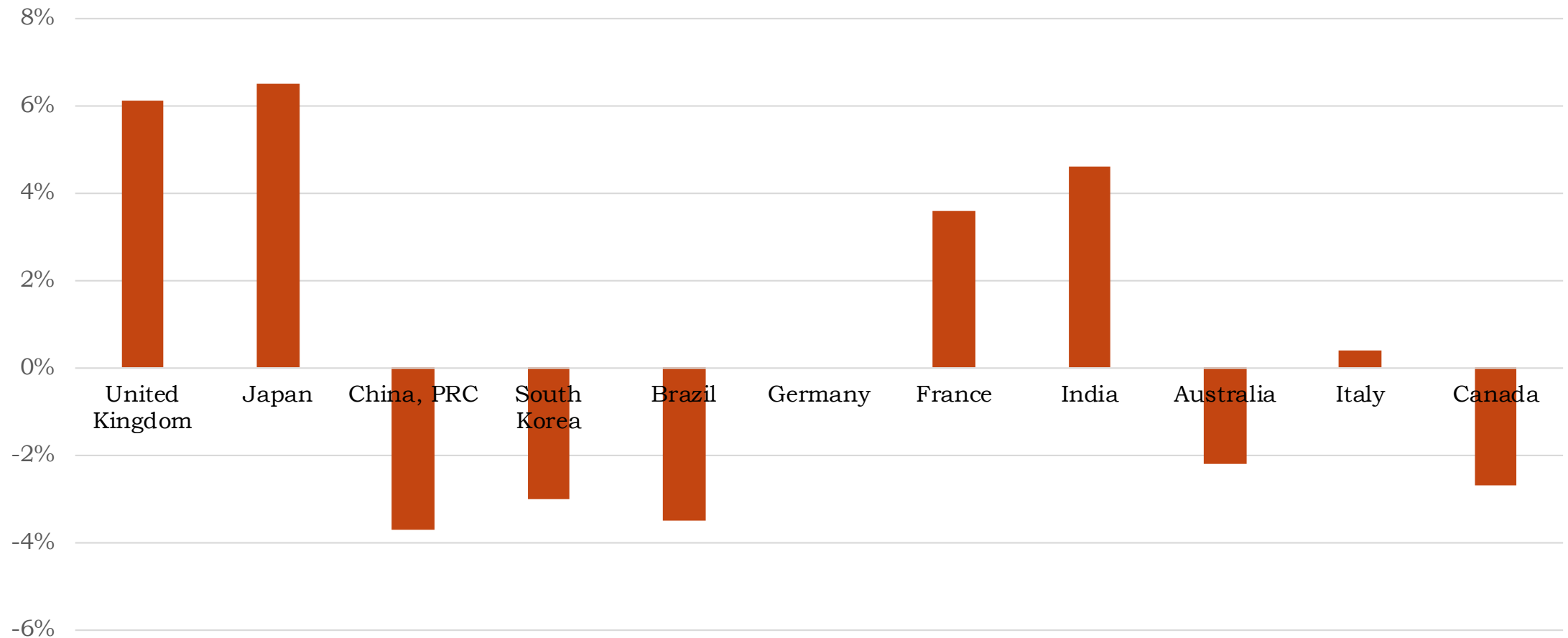


Source: *Survey of International Air Travelers 2018*, NTTO

2019 International Visitor Trends

Arrivals to the U.S.

% Change YTD July 2019*

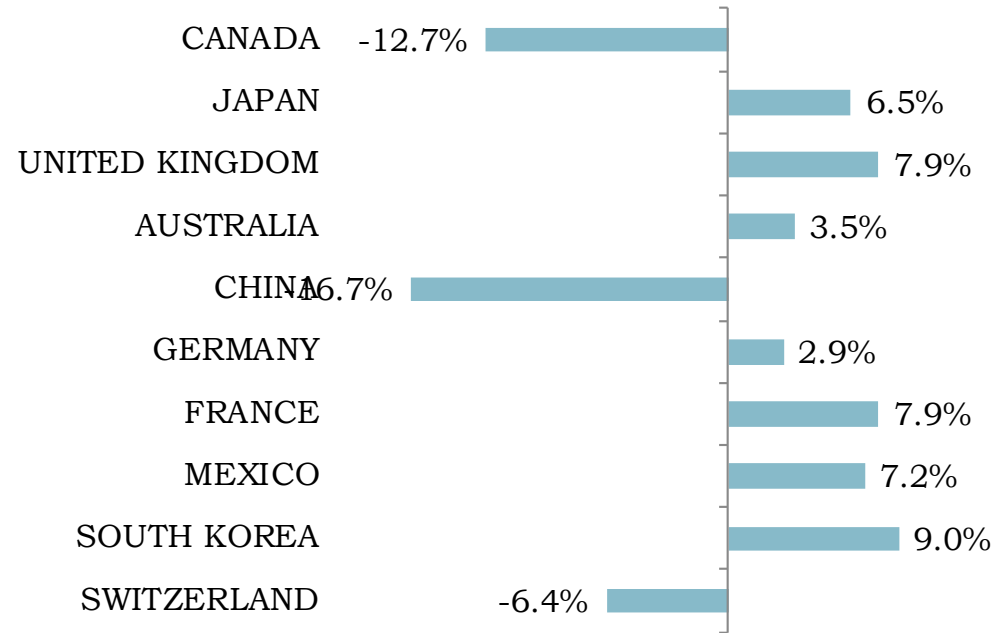


Source: National Travel and Tourism Office *Canada arrivals are YTD June 2019

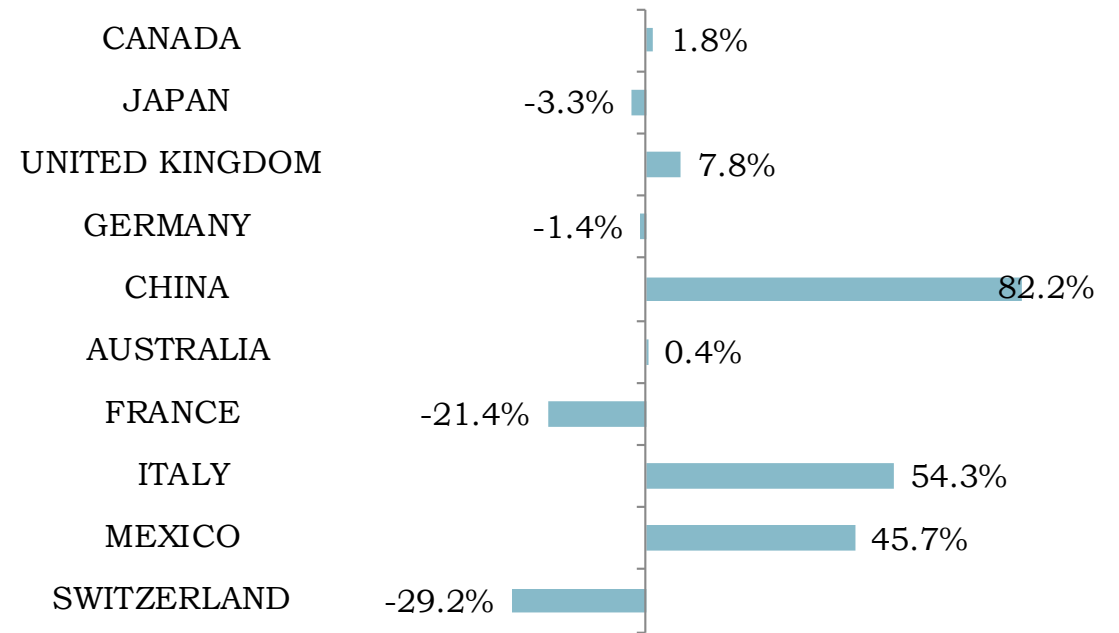
International Visa Card Spending

North Central Region

Q1 2019 (January-March)



Q2 2019 (April-June)





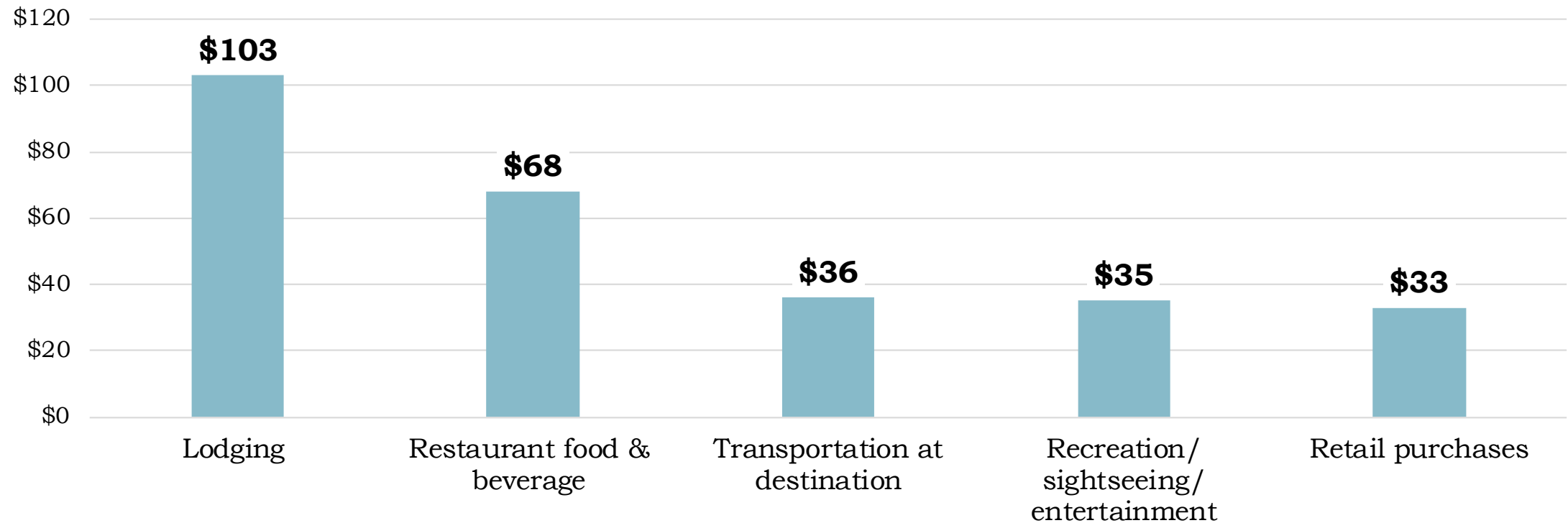
Domestic Overnight Visitor Expenditures 2018

North Central Region



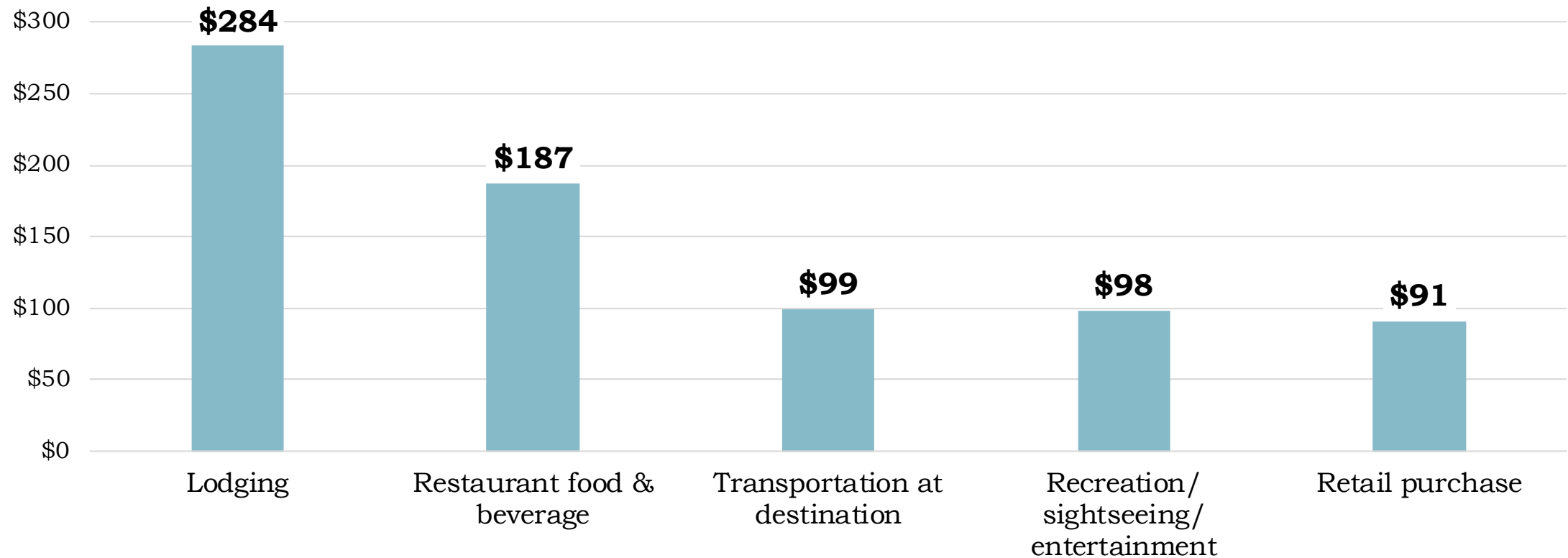
Average Per-Person Expenditures on Domestic Overnight Trips

Average Per Person \$275



Average Per-Party Expenditures on Domestic Overnight Trips

Average Per Party \$759





Domestic Overnight Visitor Profile 2018

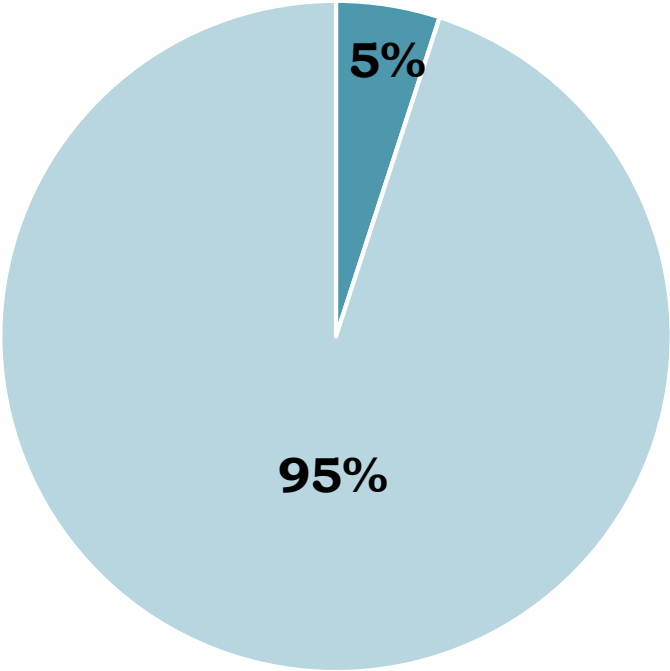
North Central Region



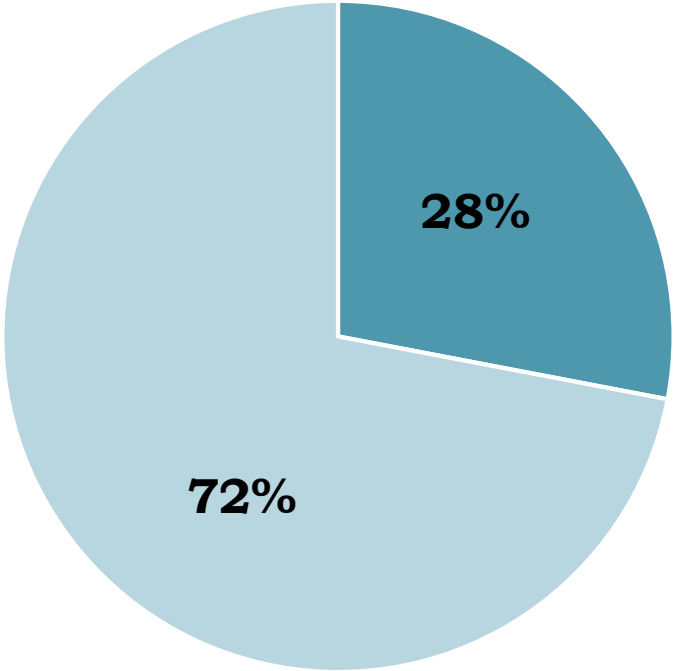


2018 Regional Domestic Visitor Profile

North Central Region



■ Business ■ Leisure

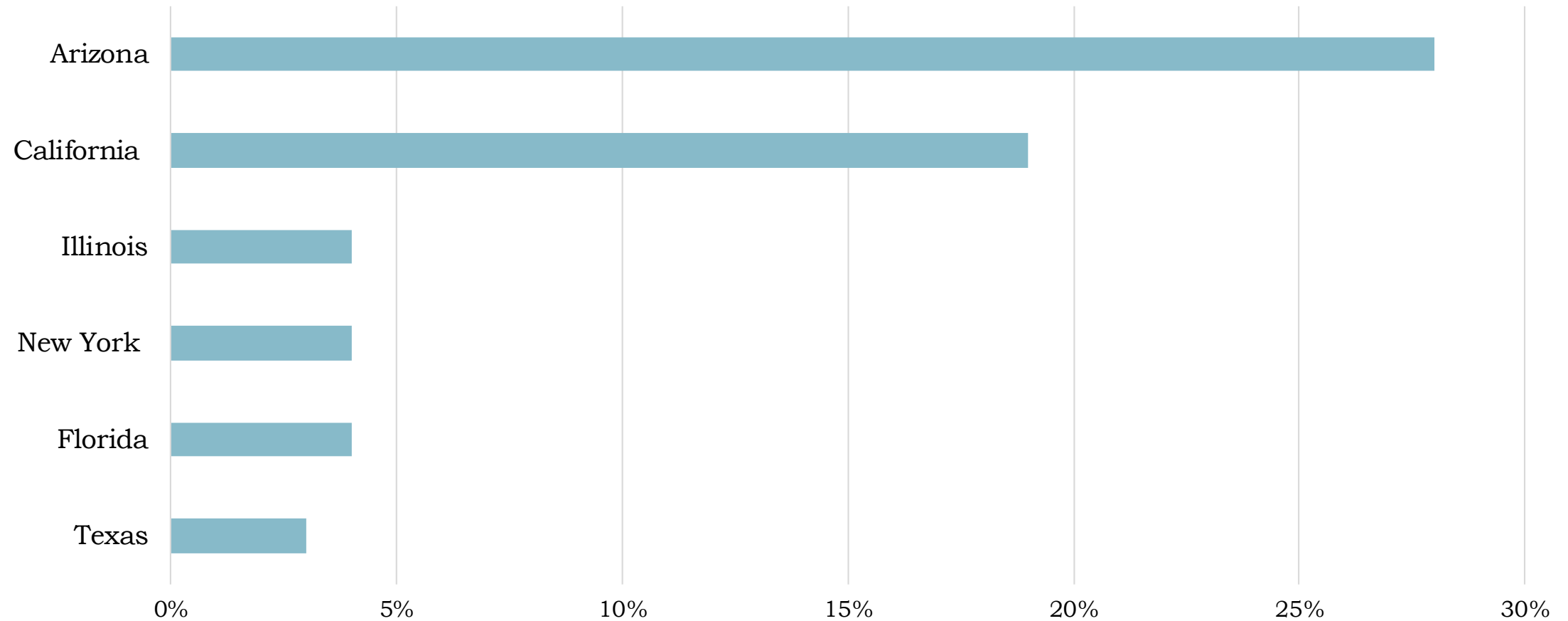


■ AZ Residents ■ Non-Residents



State Origin of Overnight Trips

North Central Region

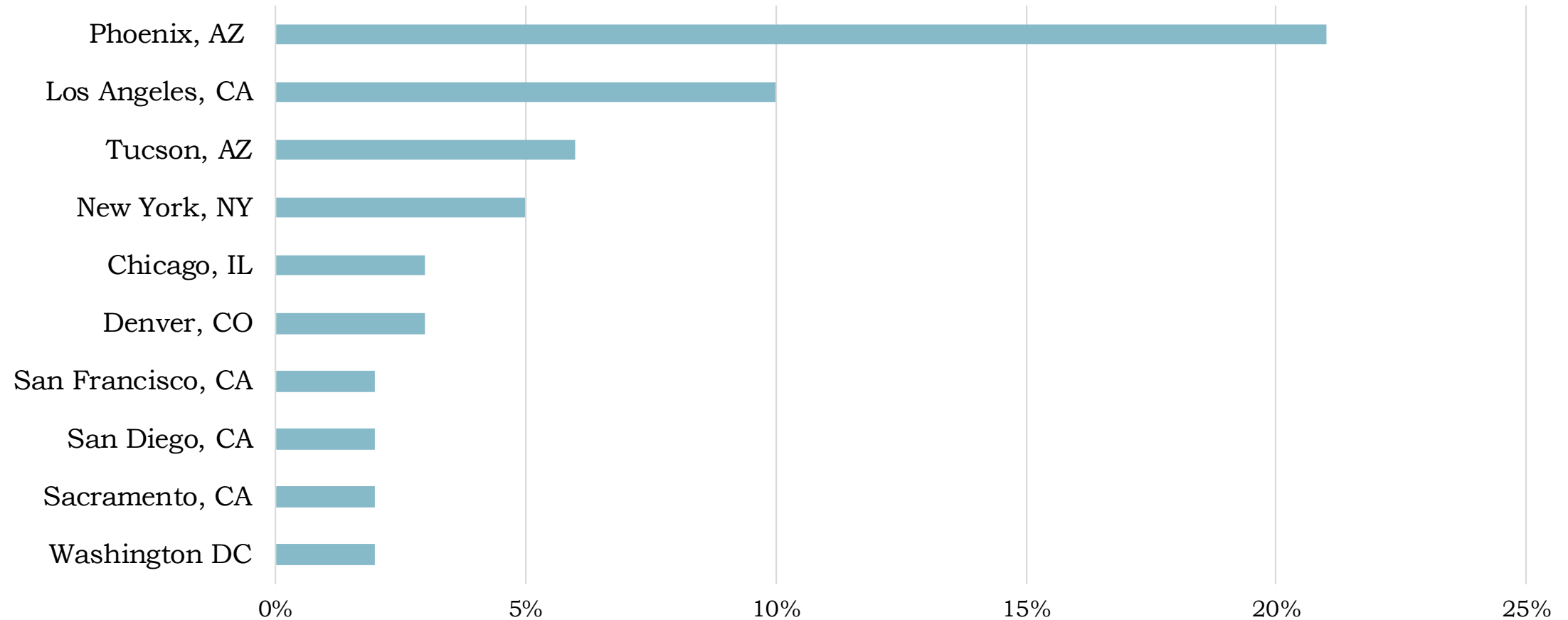


Source: Longwoods International



DMA Origin of Overnight Trip

North Central Region

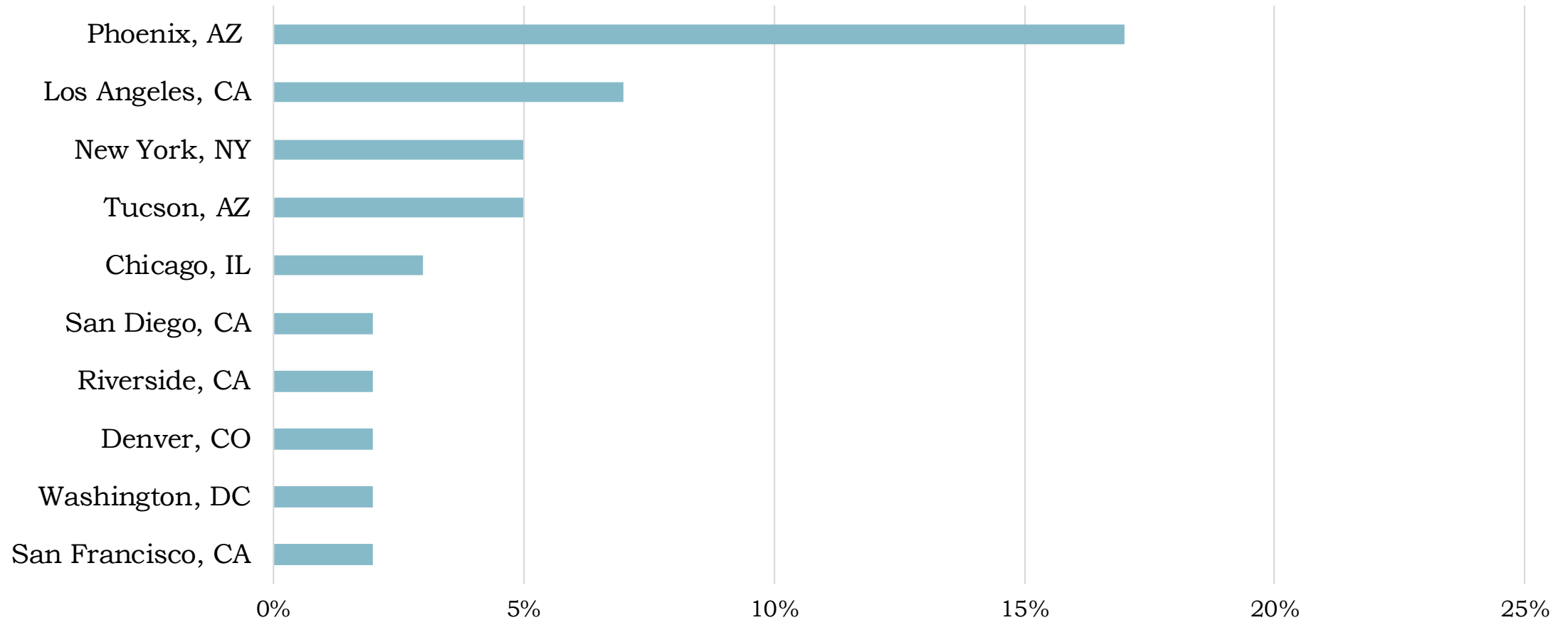


Source: Longwoods International



MSA Origin of Overnight Trip

North Central Region

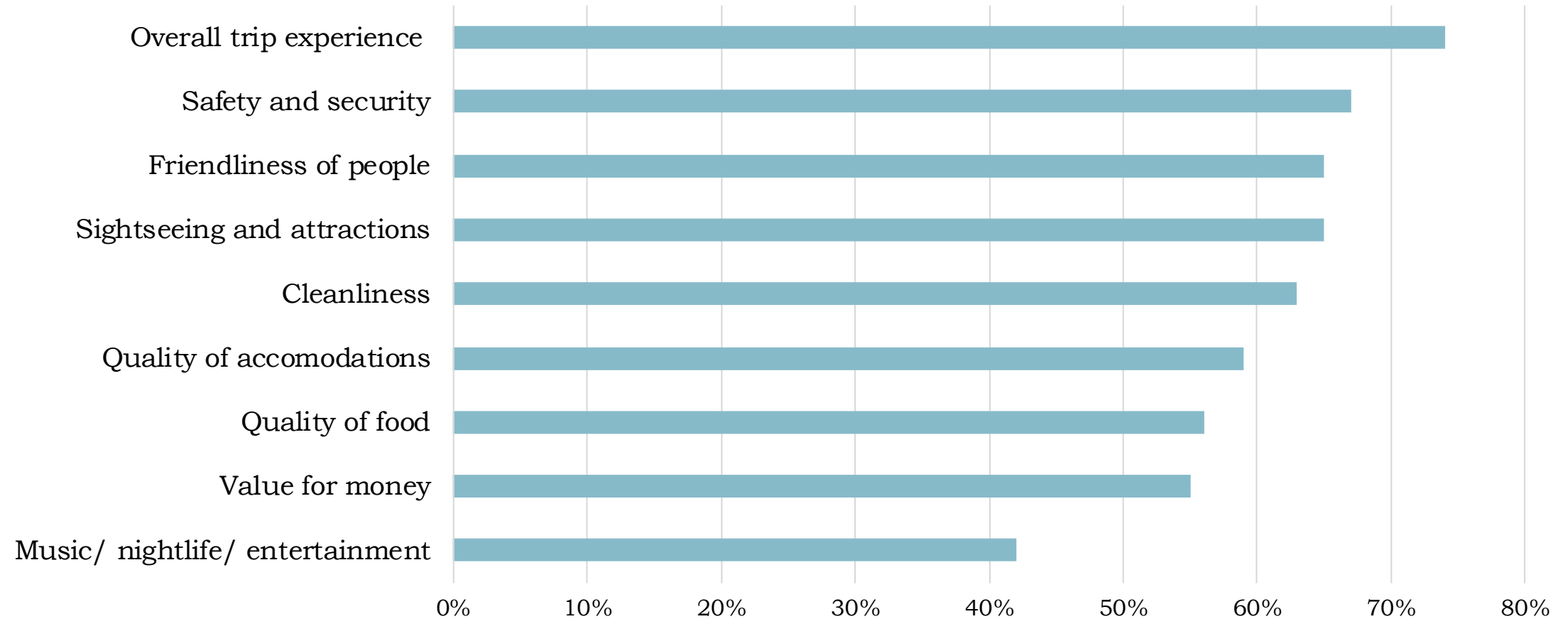


Source: Longwoods International



Satisfaction with Trip - % Very Satisfied

North Central Region

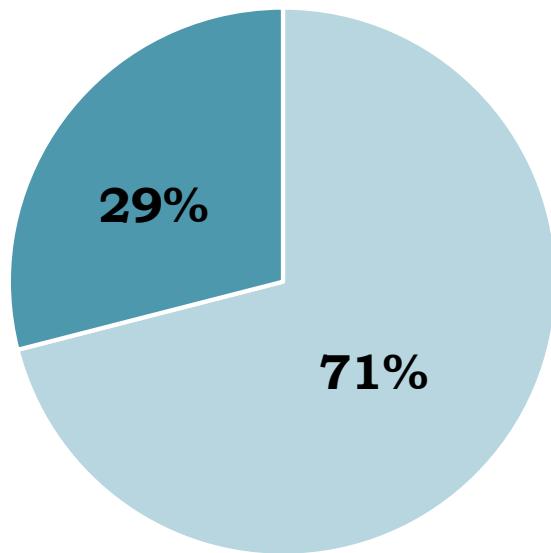




Past Visitation

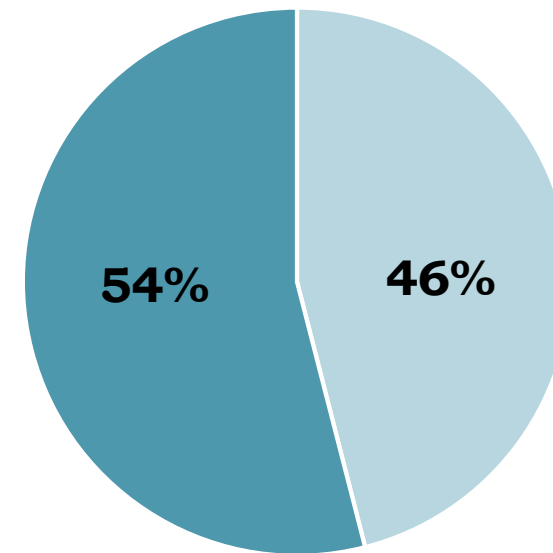
North Central Region

Have you ever visited the North Central Region before?



■ Yes ■ No

Have you visited the North Central Region in the past 12 months?

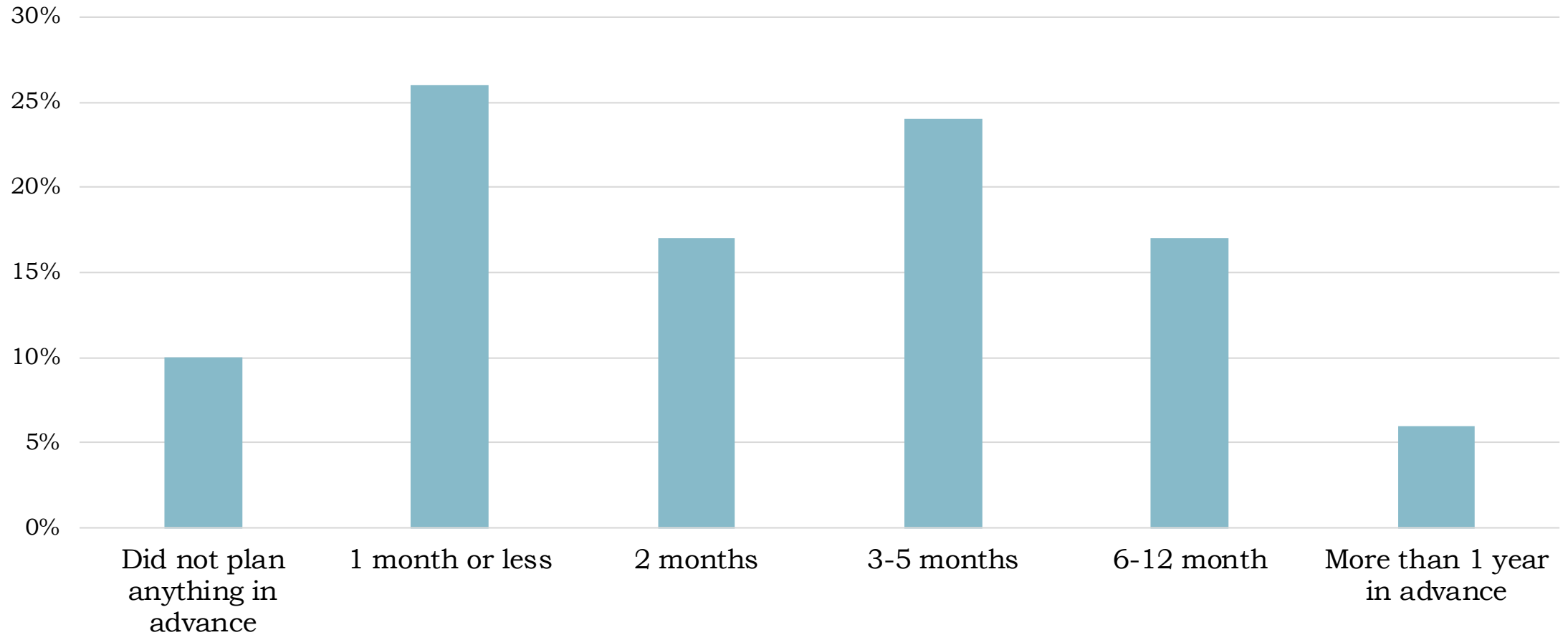


■ Yes ■ No



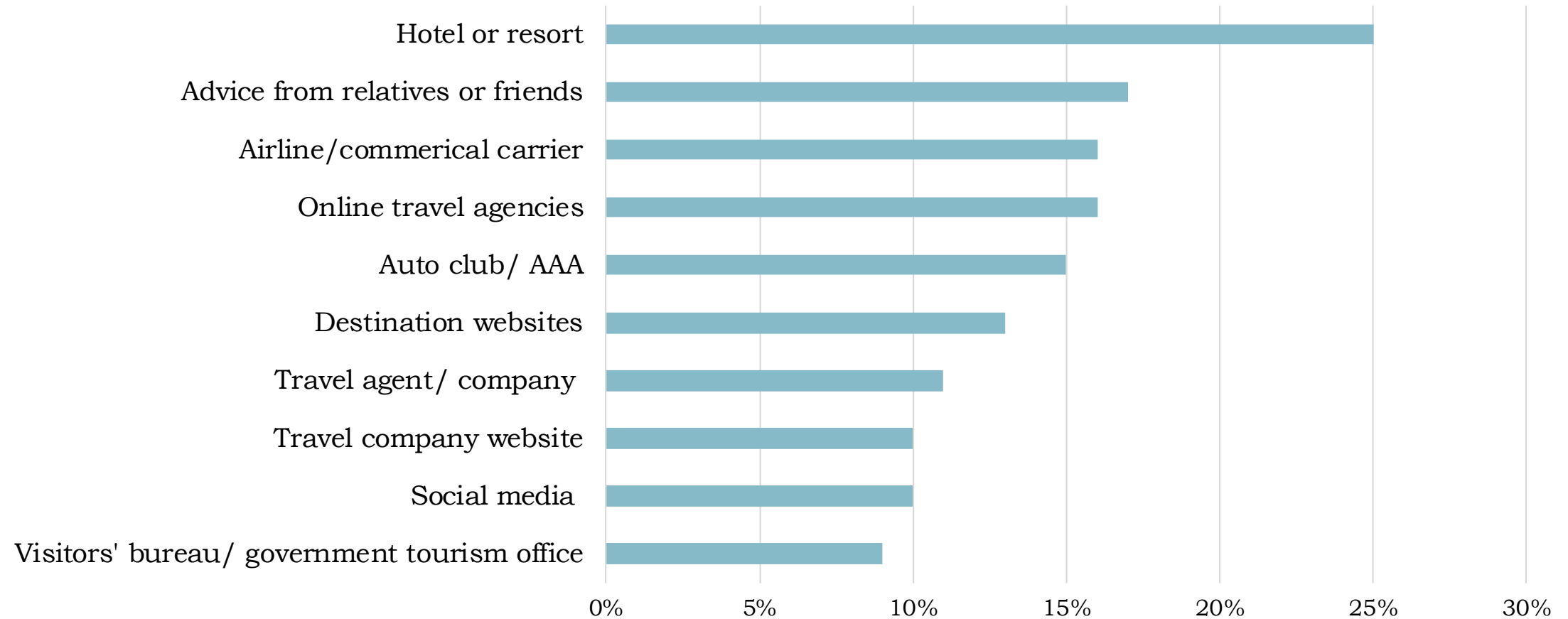
Length of Trip Planning

North Central Region



Trip Planning Information Sources

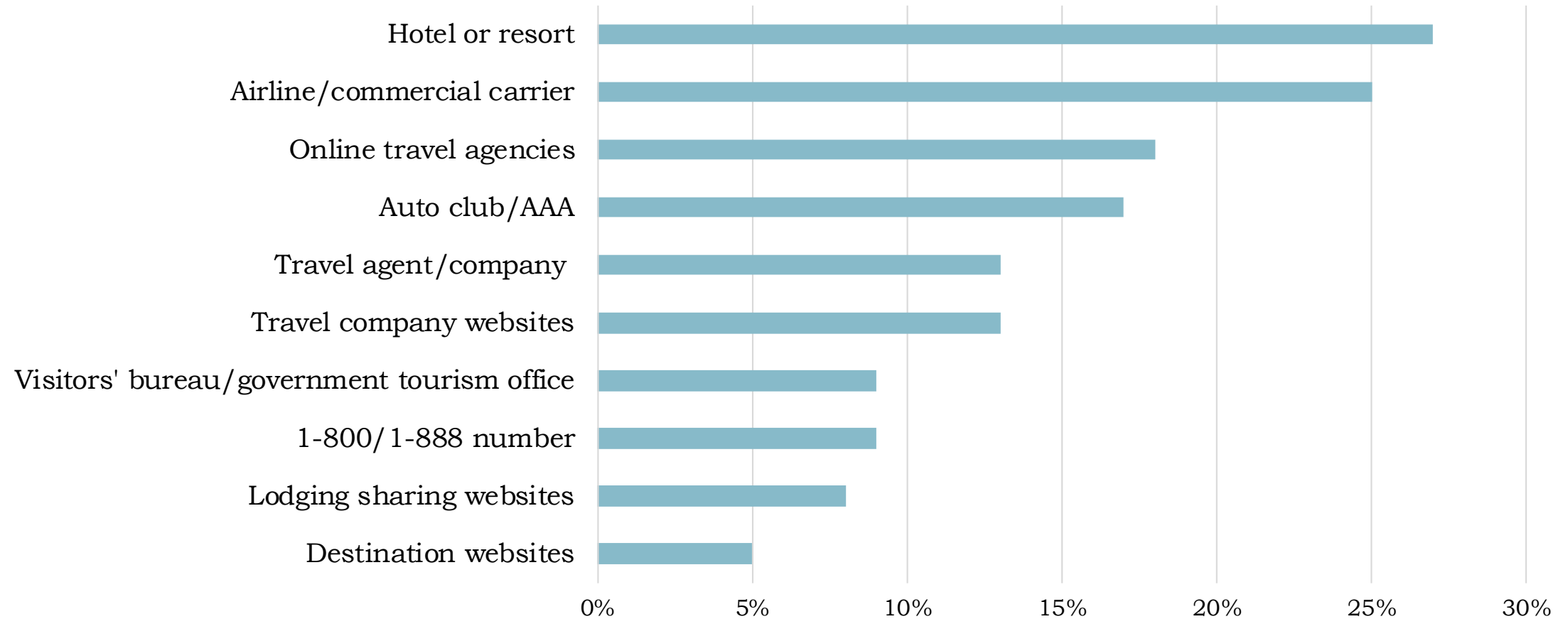
North Central Region





Method of Booking

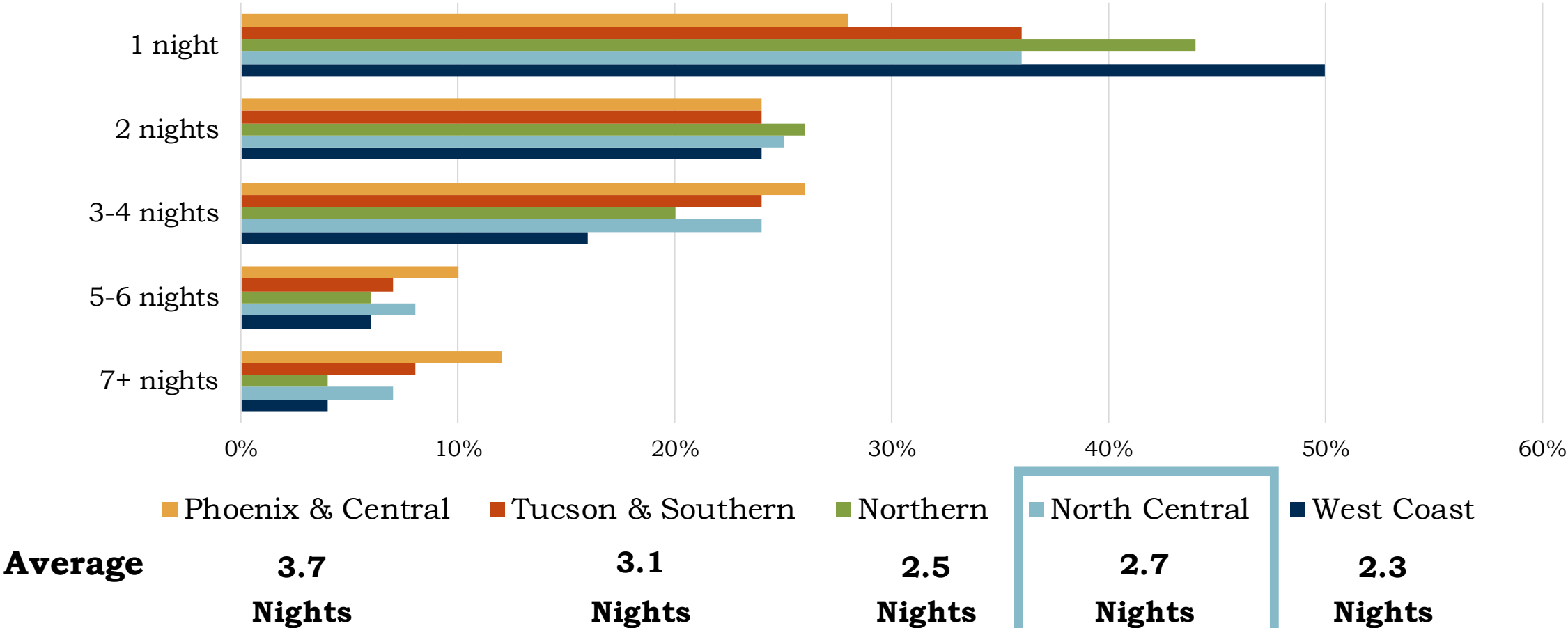
North Central Region





Number of Nights Spent in Each Region

North Central Region

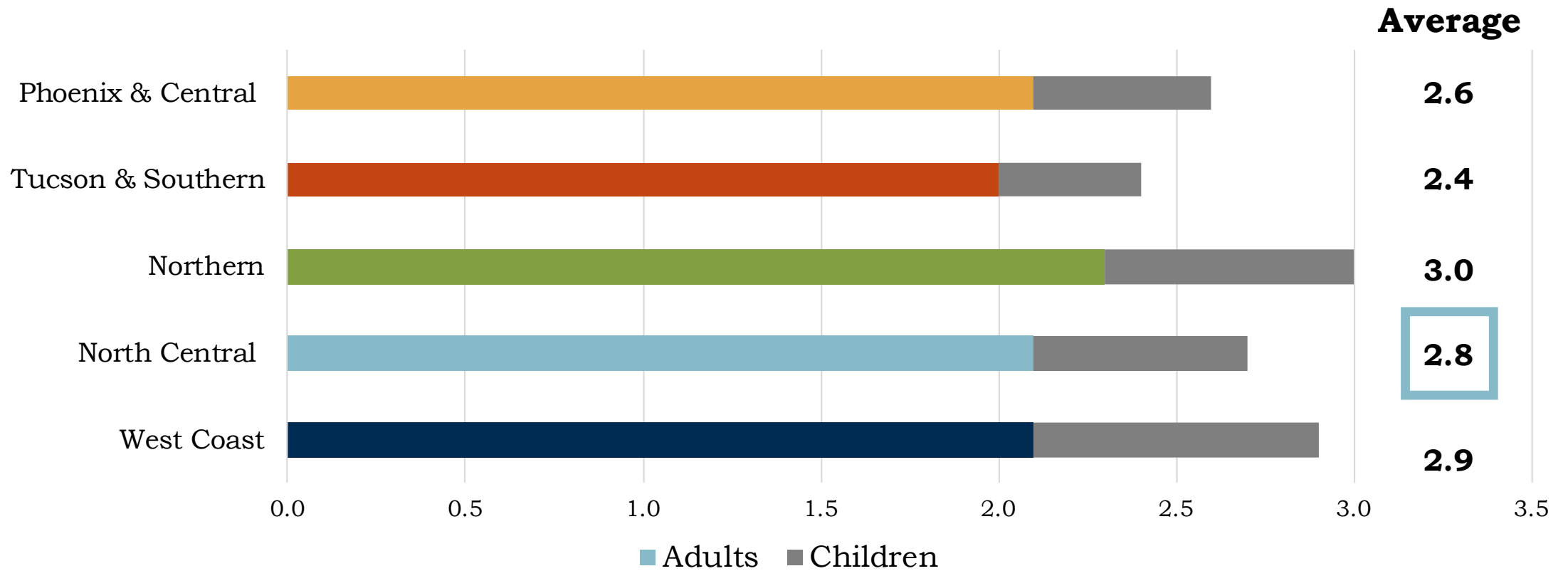


Source: Longwoods International, 2018



Size of Travel Party

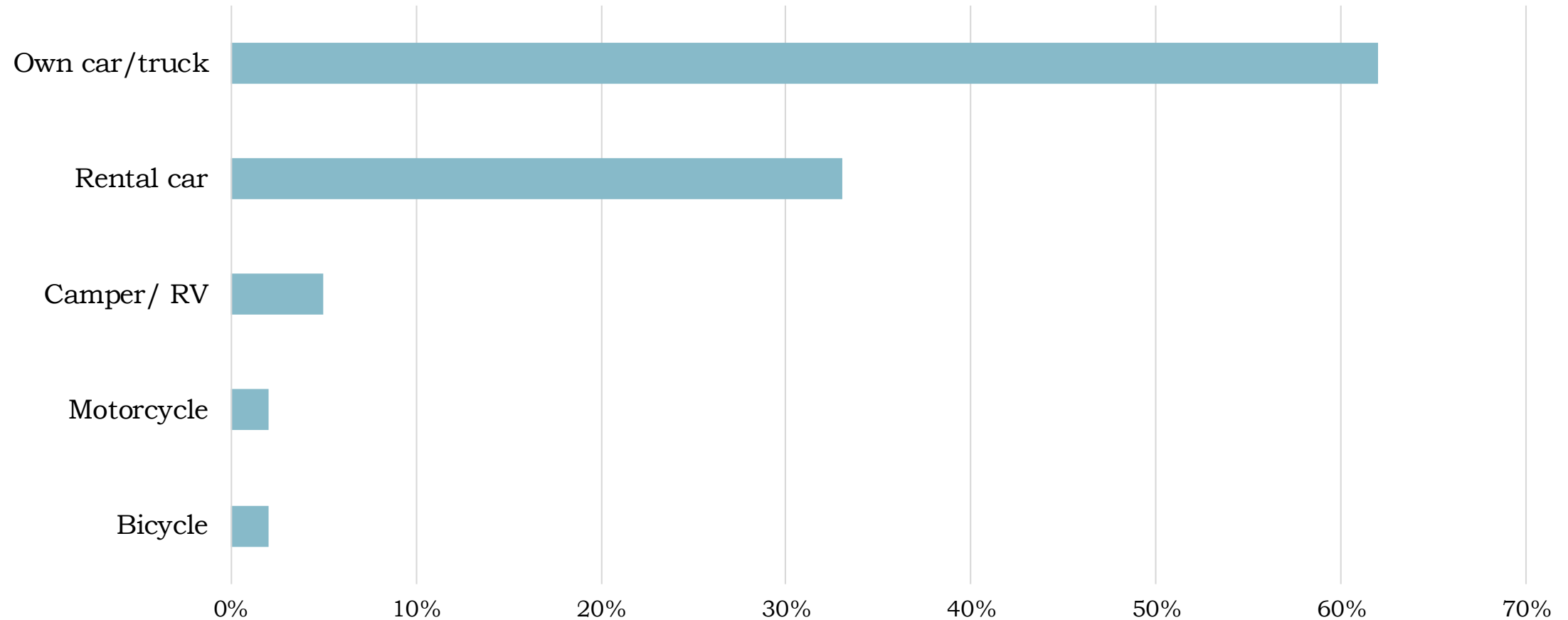
North Central Region





Transportation – Private Vehicles

North Central Region

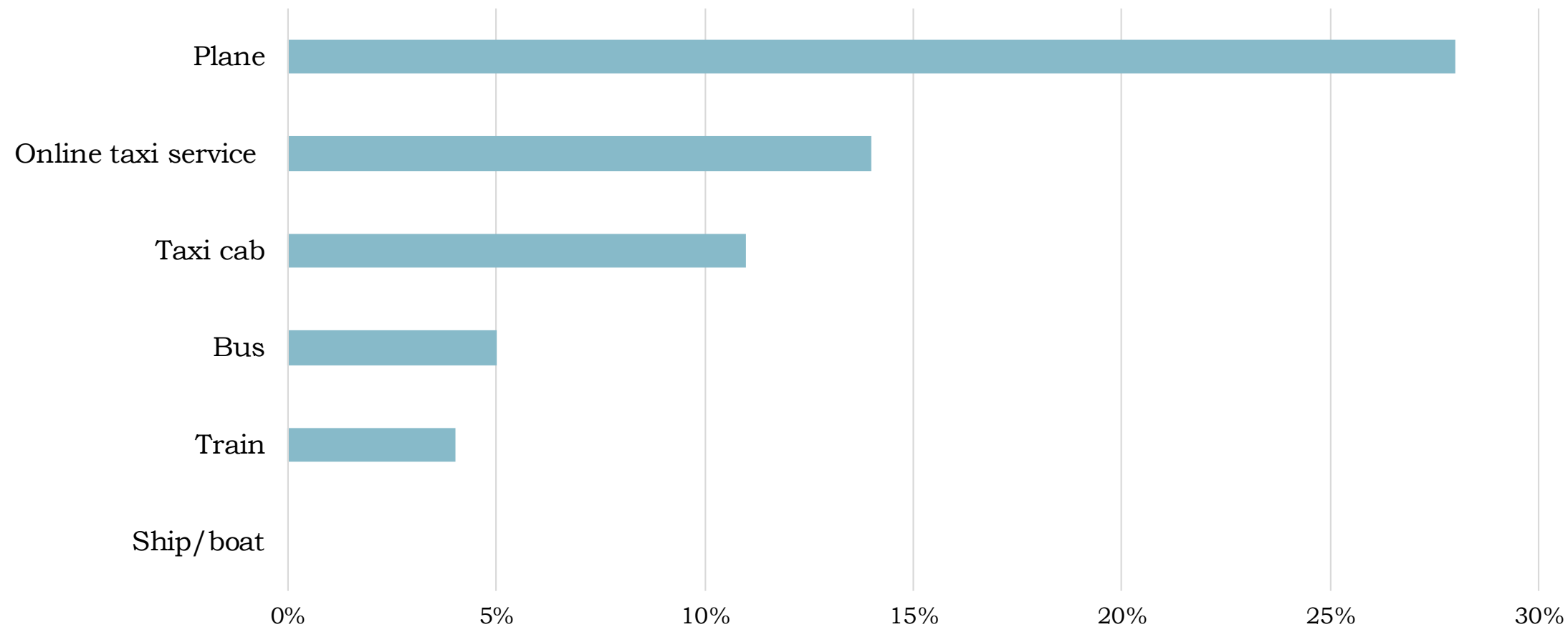


Source: Longwoods International



Transportation – Commercial Vehicles

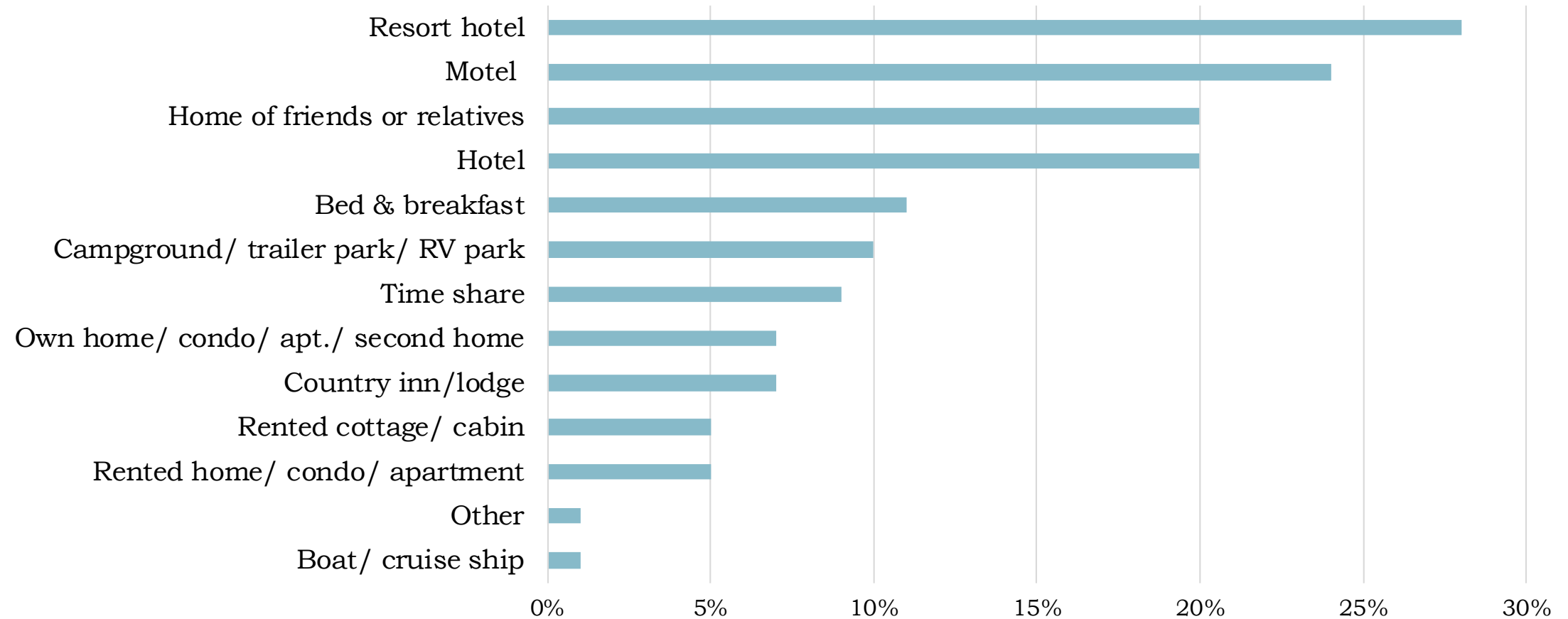
North Central Region





Accommodation

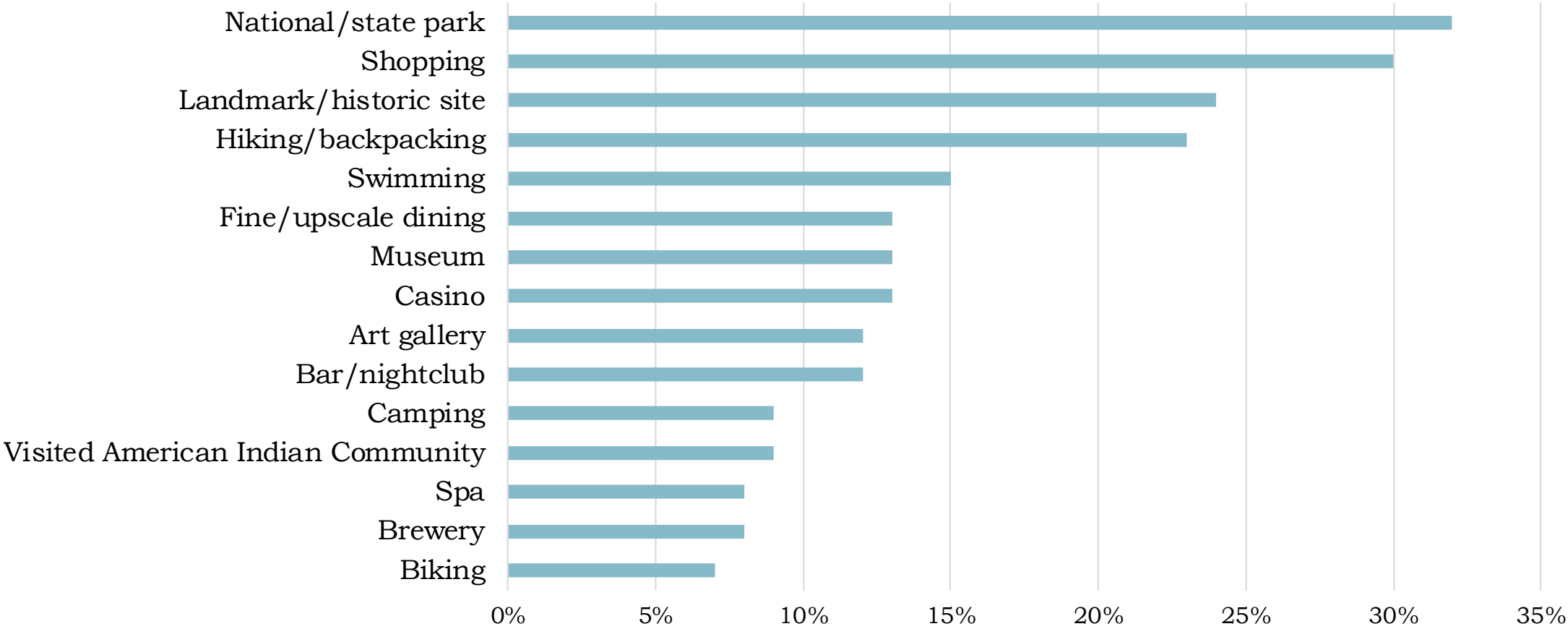
North Central Region





Activities and Experiences

North Central Region

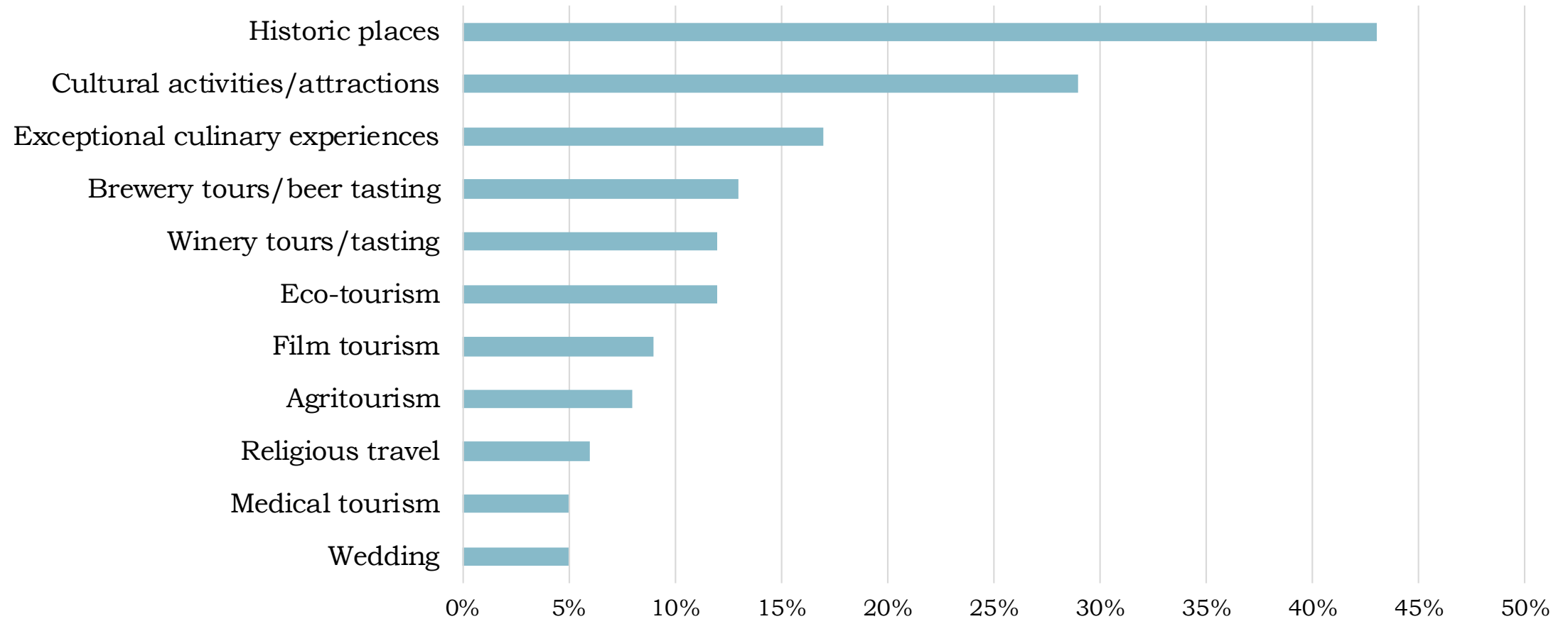


Source: Longwoods International



Activities of Special Interest

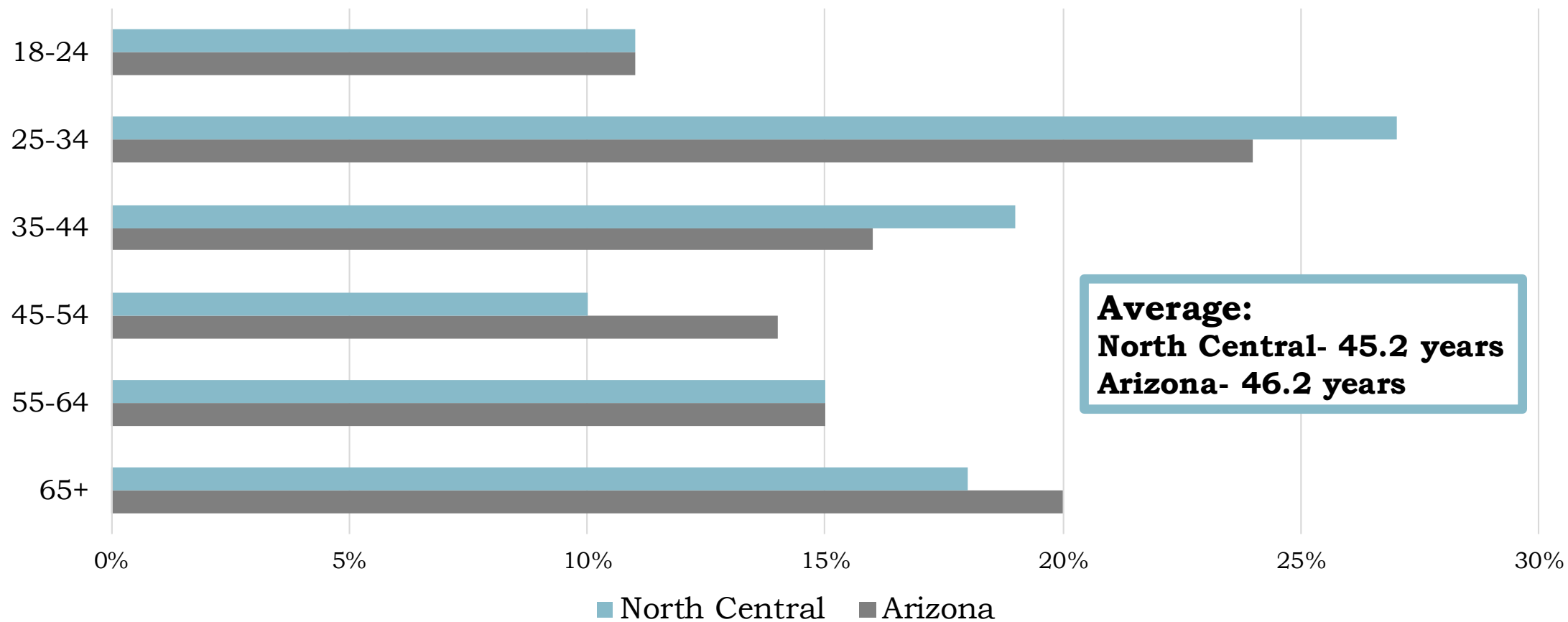
North Central Region





Age

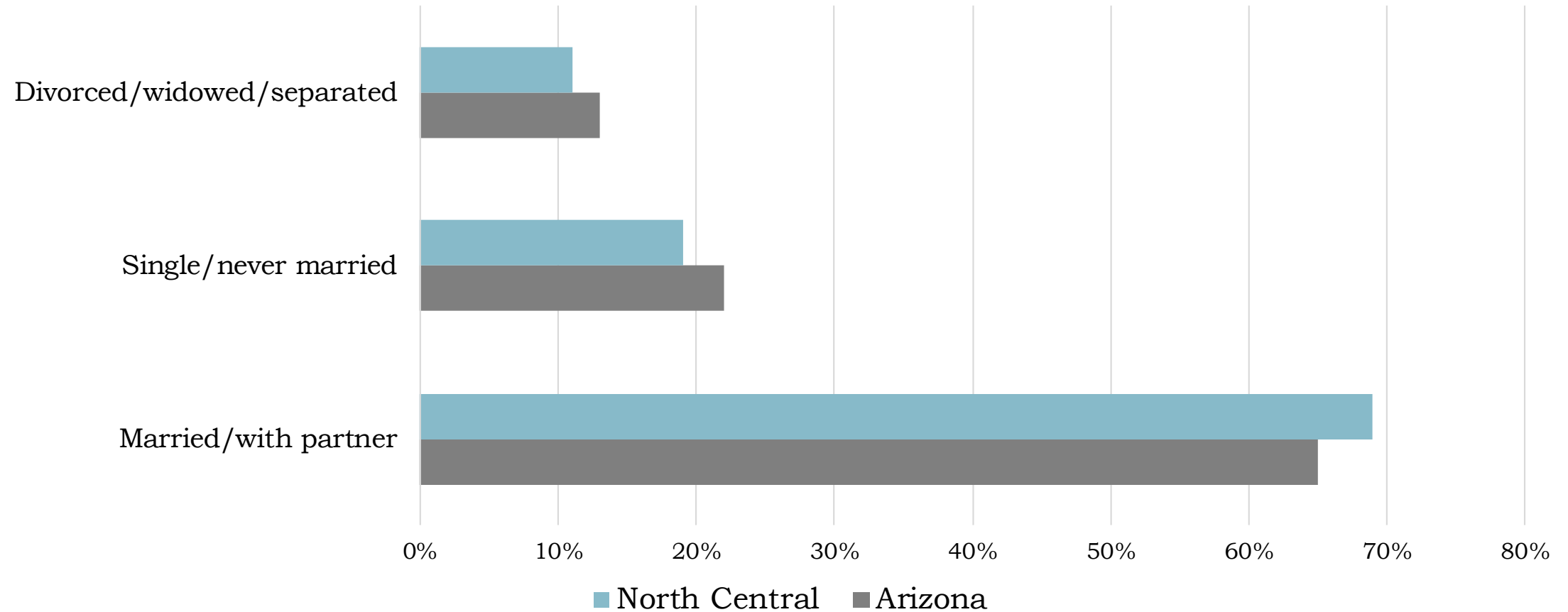
North Central Region





Marital Status

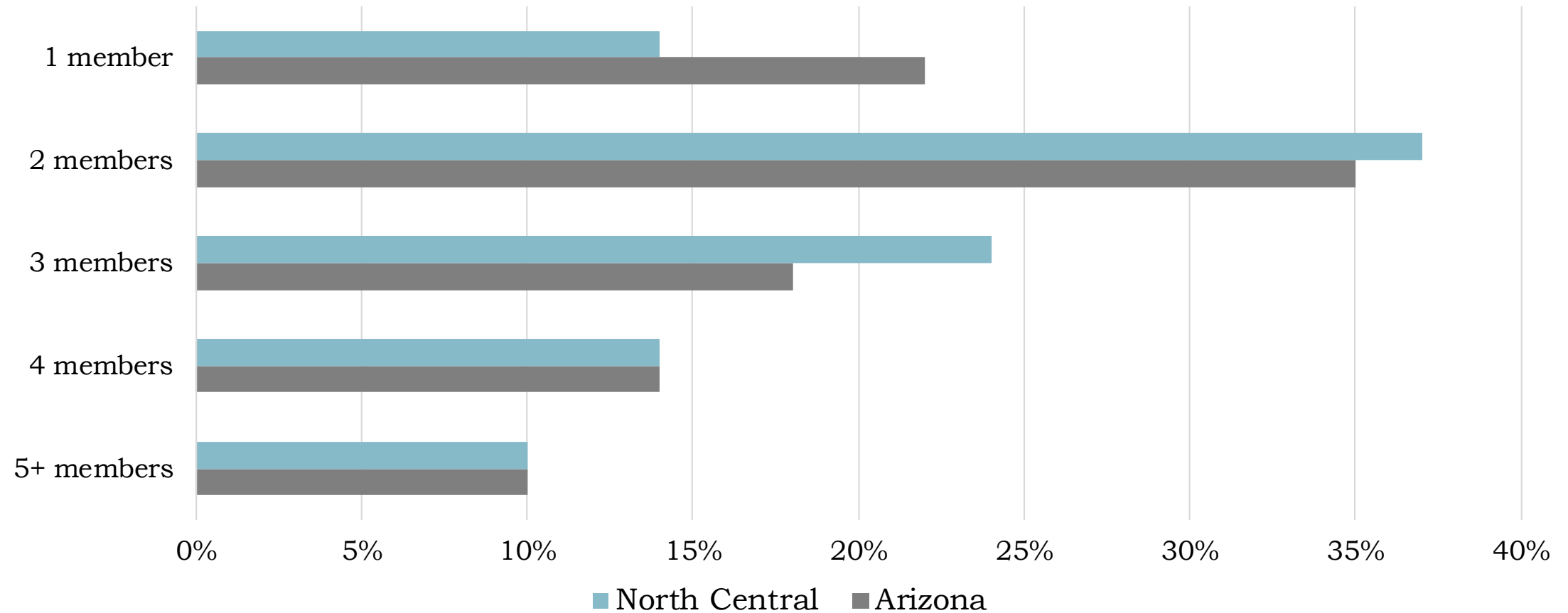
North Central Region





Household Size

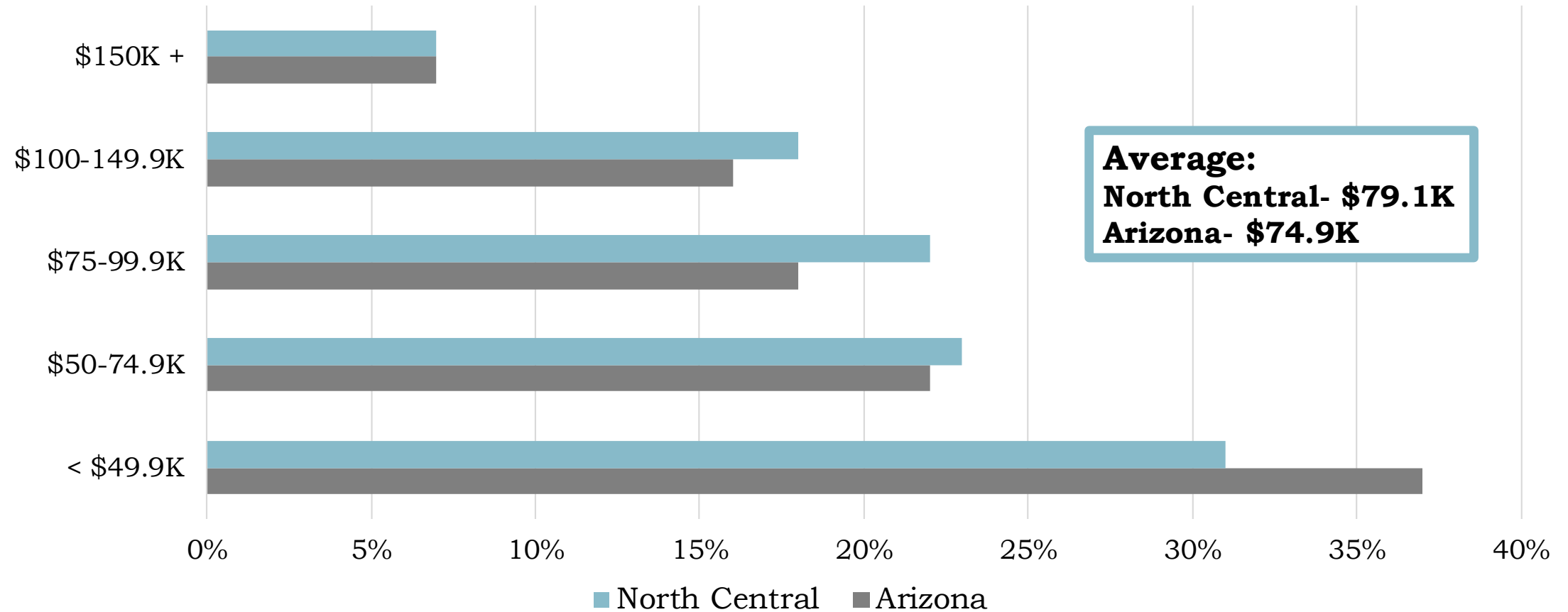
North Central Region





Household Income

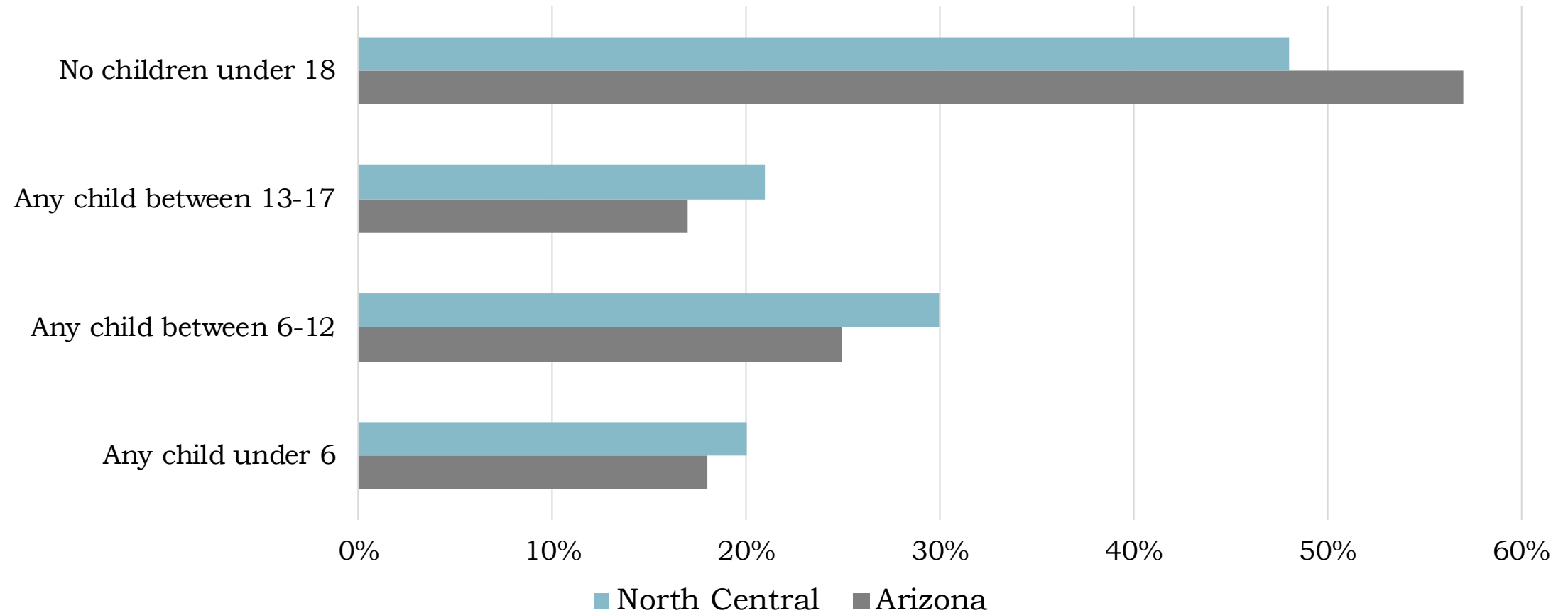
North Central Region





Children in Household

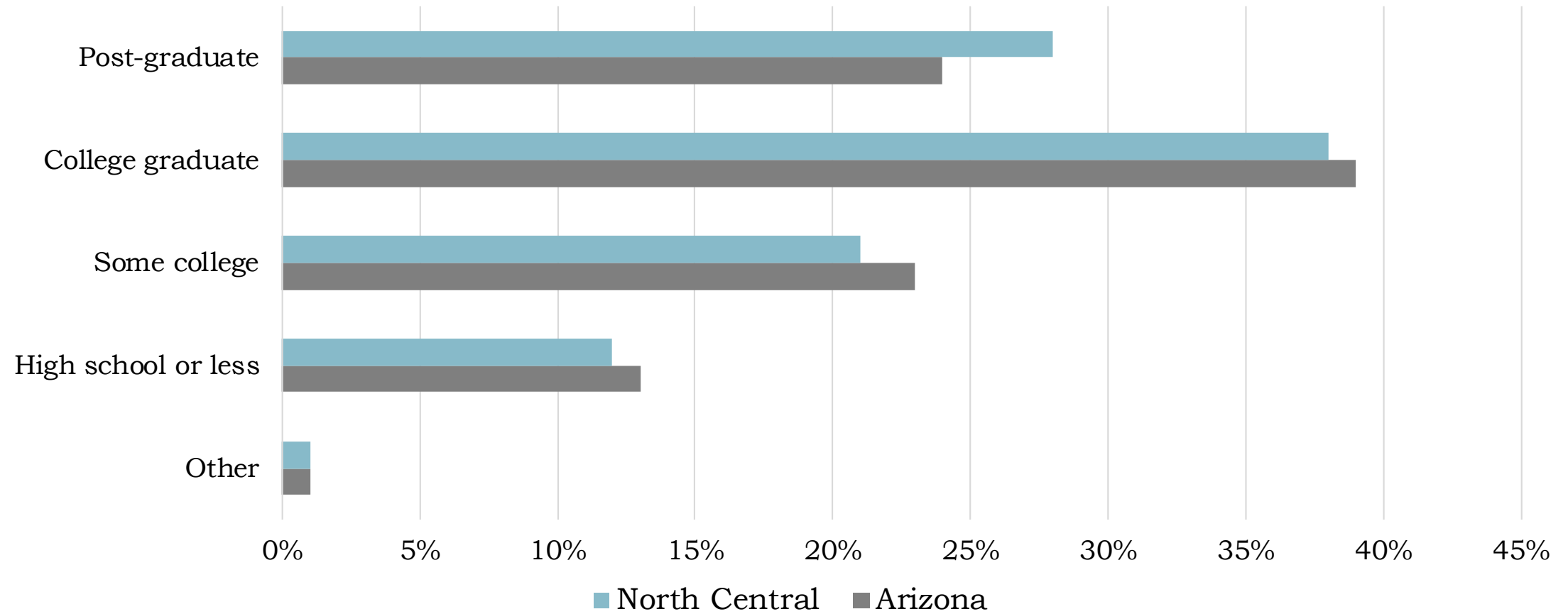
North Central Region





Education

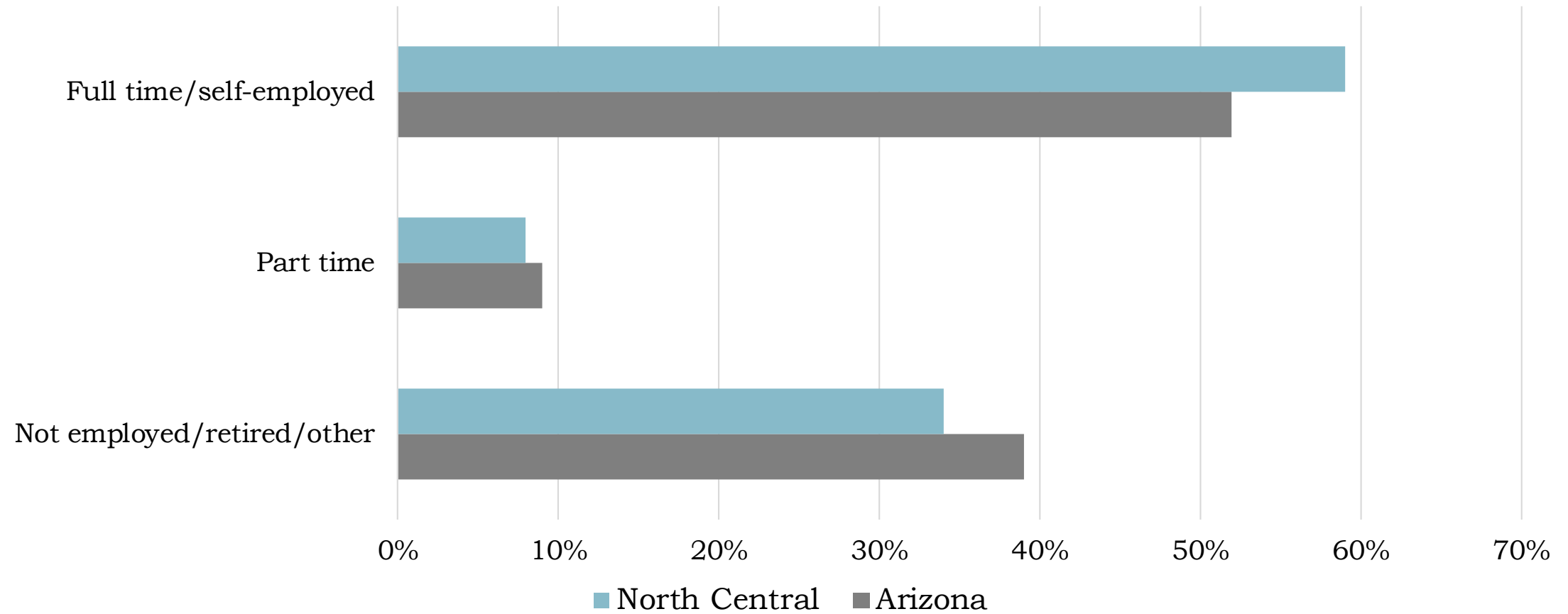
North Central Region





Employment

North Central Region



Stay Connected



Presentation slides available at:
<http://tourism.az.gov/regional-profiles>

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