



# *Northern Region 2018 Year-End Data Review*

September 25, 2019







# AOT Research Staff



Colleen Floyd  
Director of Research  
[cfloyd@tourism.az.gov](mailto:cfloyd@tourism.az.gov)  
602-364-3716



Kari Roberg  
Senior Research Manager  
[kroberg@tourism.az.gov](mailto:kroberg@tourism.az.gov)  
602-364-4158



Lena Allen  
Marketing & Research Manager  
[lallen@tourism.az.gov](mailto:lallen@tourism.az.gov)  
602-364-3718

# 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

Northern 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 Northern Region Tourism Industry Performance

8.3 million  
Domestic Overnight  
Visitors



\$2.03 billion  
Direct Spending



# Regional Impacts, 2018

Northern Region



**\$2.03 Billion**

Up 7.0%

Direct Spending



**19,360**

Up 1.9%

Jobs



**\$189 Million**

Up 8.6%

State and Local Taxes



**\$585 Million**

Up 5.9%

Earnings



# County Impacts, 2018

Northern Region

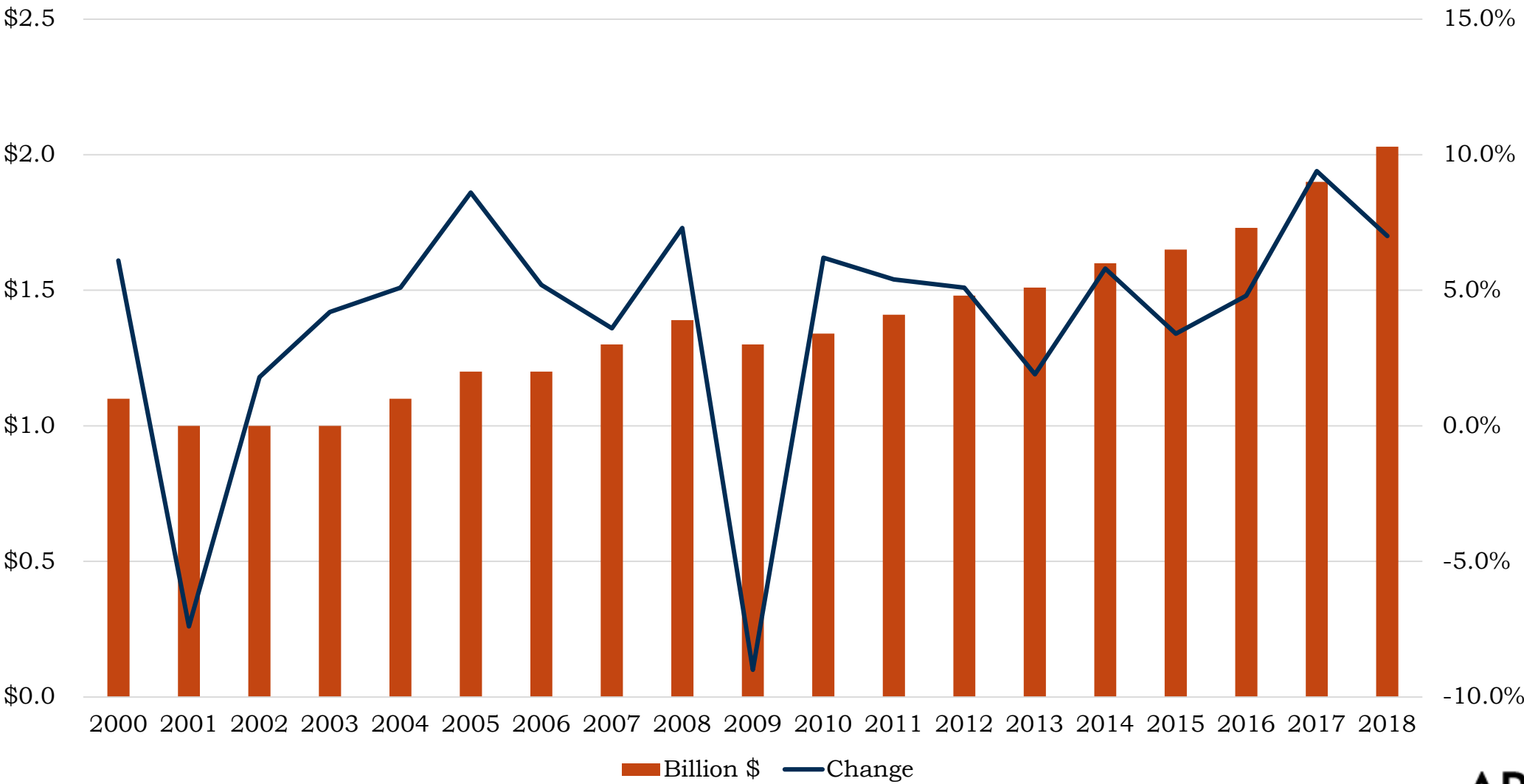
	Spending (\$million)	Jobs	Earnings (\$millions)	State and Local Taxes (\$millions)	Tax Revenue per Household
Apache	\$119	1,590	\$38	\$9.9	\$440
Coconino	\$1,569	13,640	\$434	\$147.0	\$2,970
Navajo	\$343	4,130	\$113	\$31.5	\$860





# Regional Direct Travel Spending

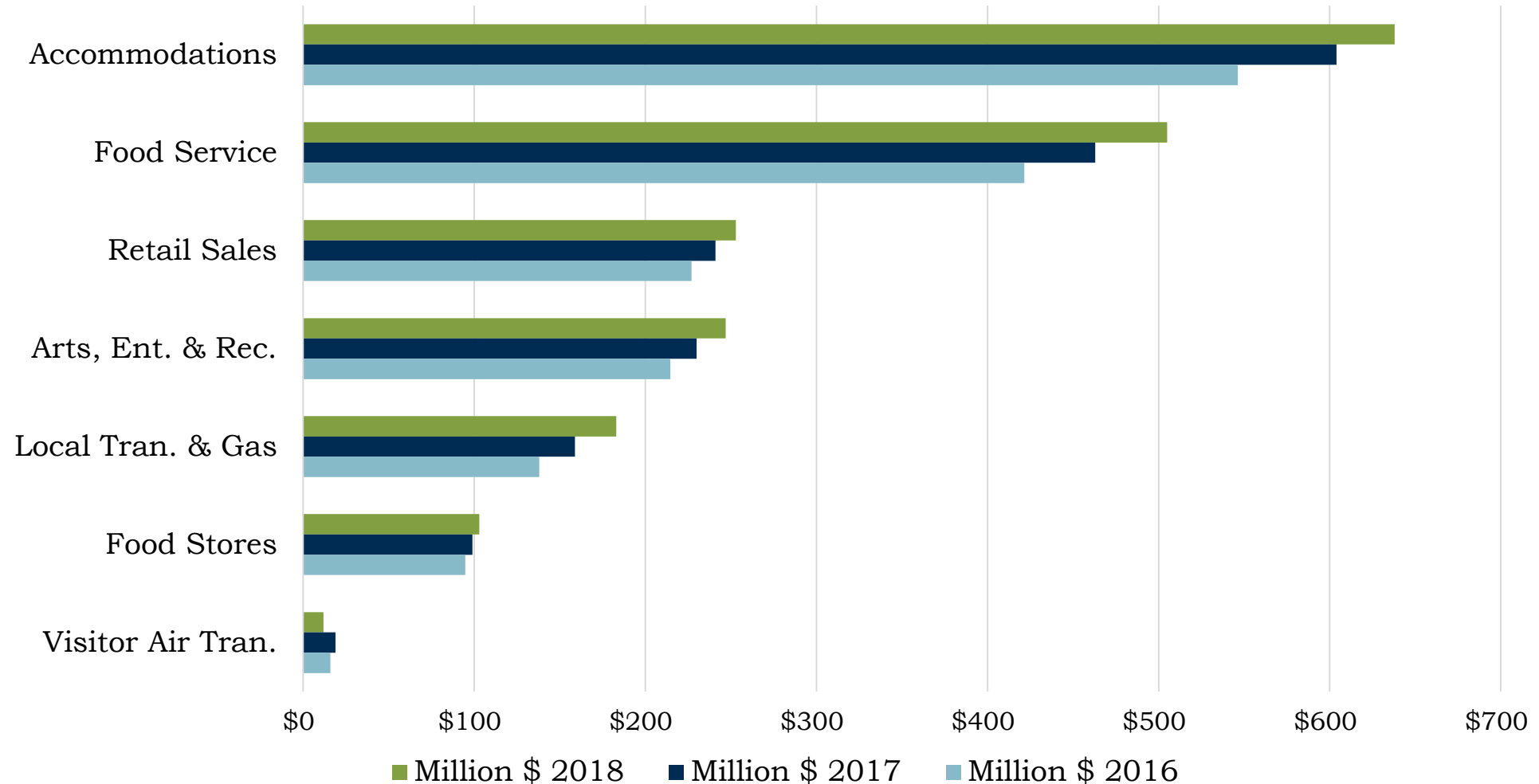
Northern Region



Source: Dean Runyan Associates

# Spending by Commodity Purchased

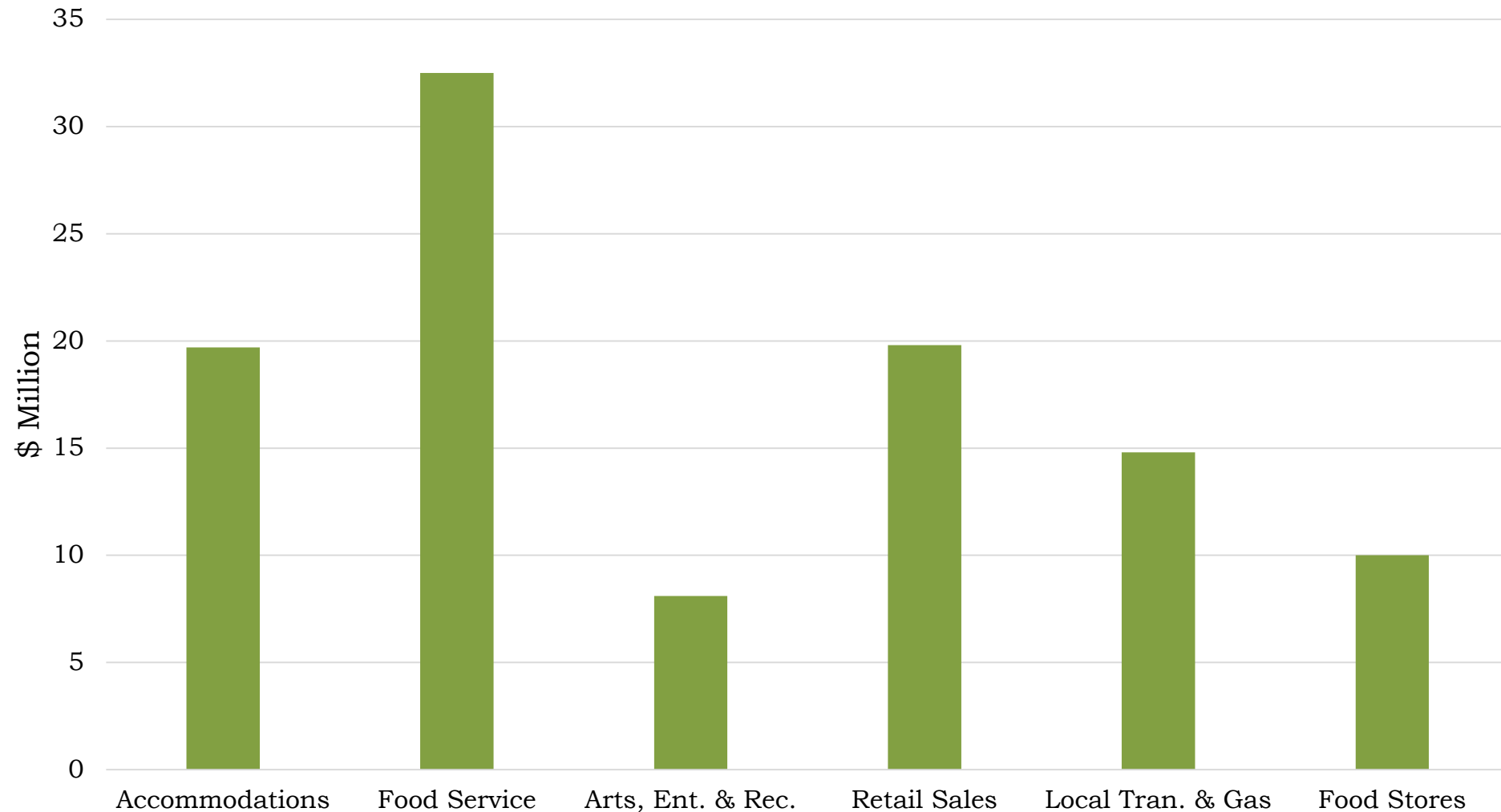
Northern Region





# Spending by Commodity Purchased

Apache County



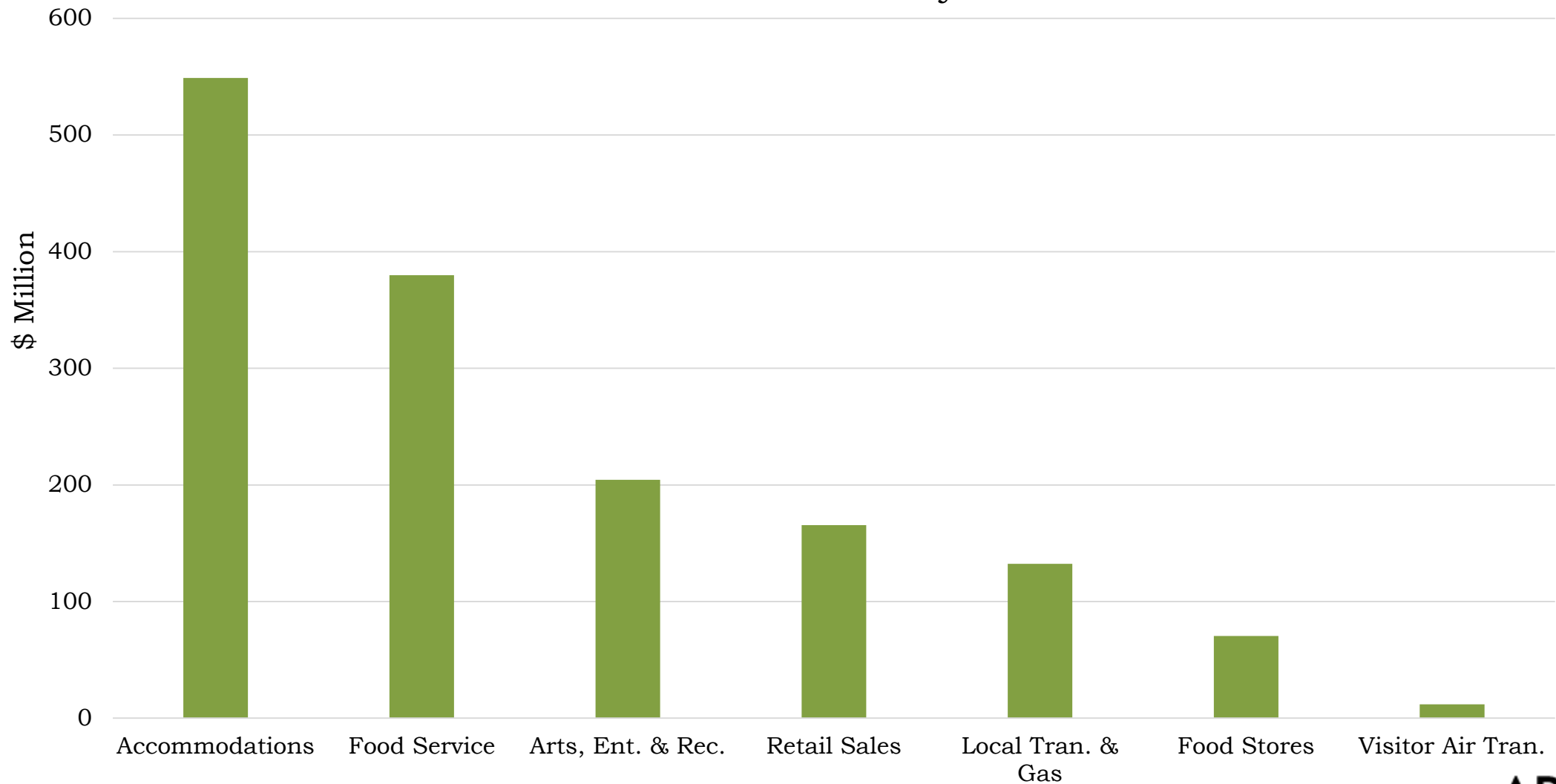
Source: Dean Runyan Associates, 2018





# Spending by Commodity Purchased

Coconino County

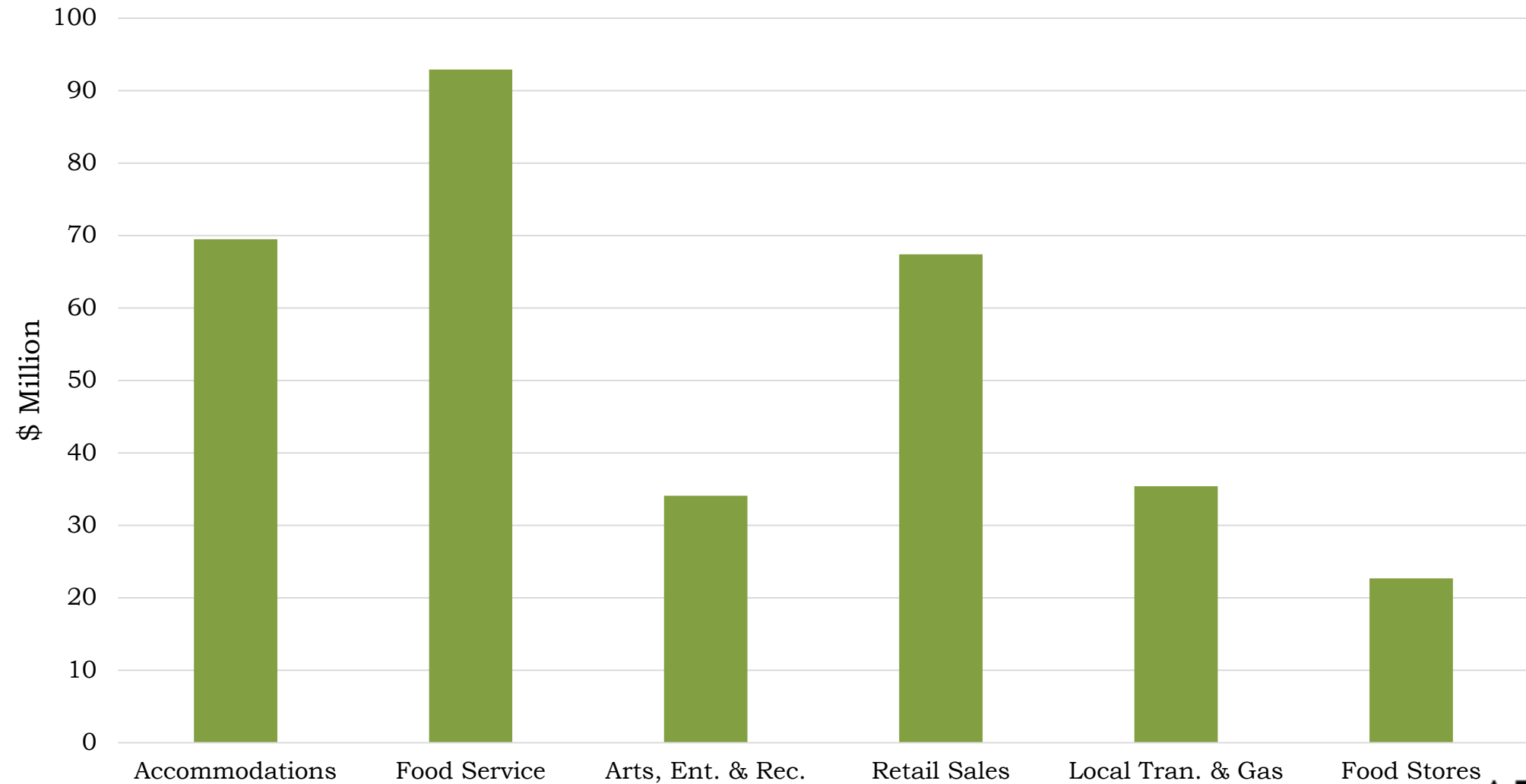


Source: Dean Runyan Associates, 2018



# Spending by Commodity Purchased

Navajo County

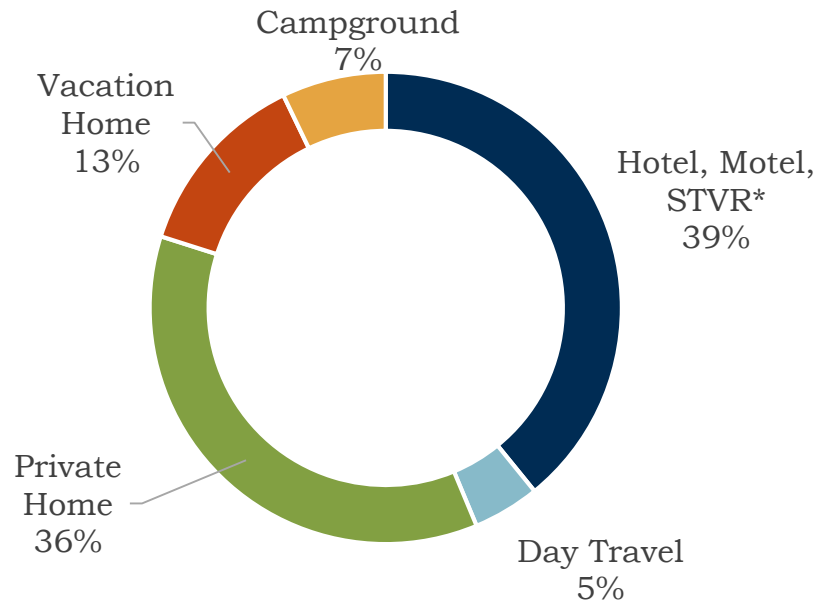


Source: Dean Runyan Associates, 2018

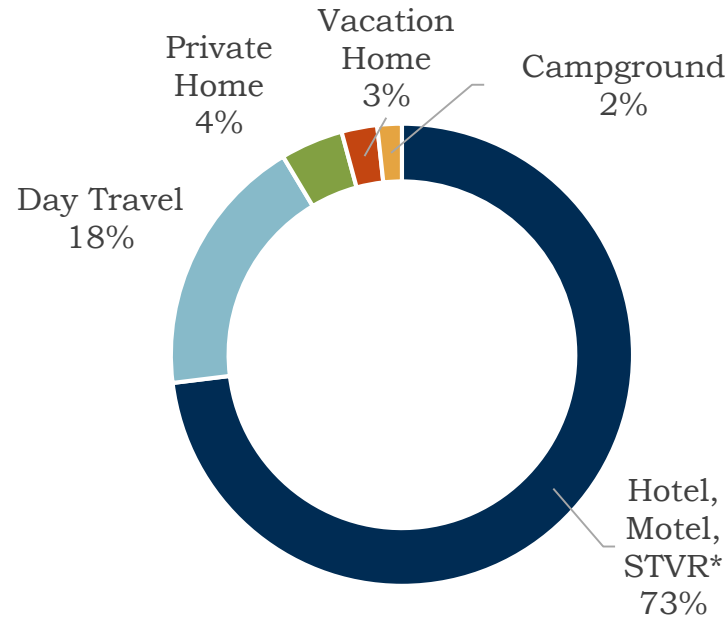
# Spending by Type of Accommodation

## Northern Region

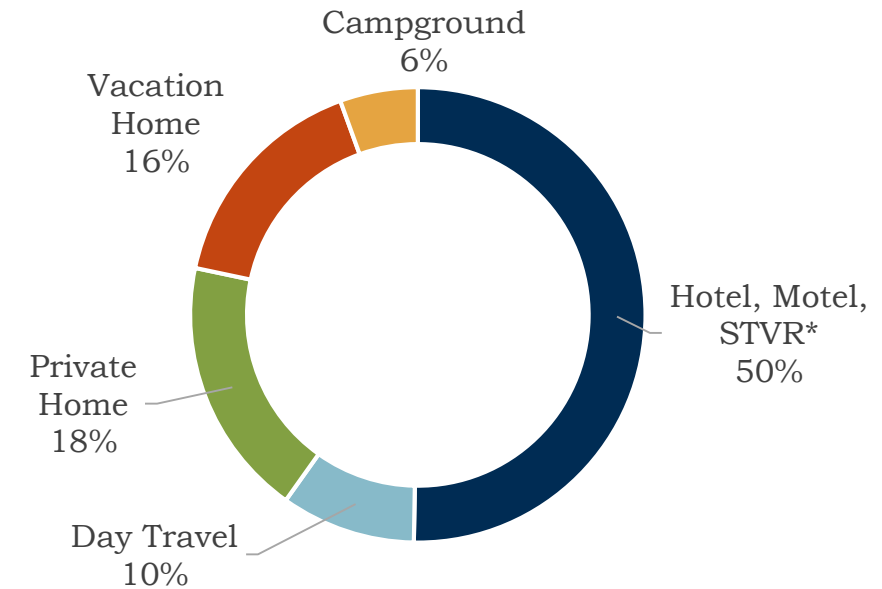
### Apache County



### Coconino County



### Navajo County



\*STVR = Short-term vacation rental





# 2019 Tourism Indicators To-Date

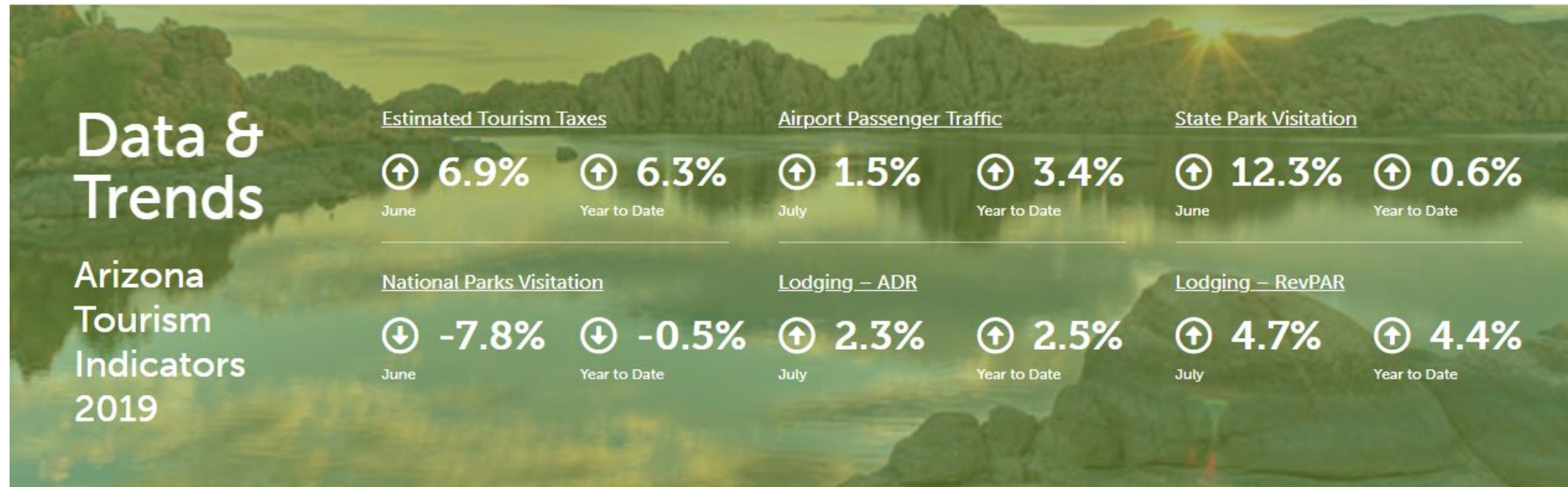
Northern Region





# Tourism Indicators

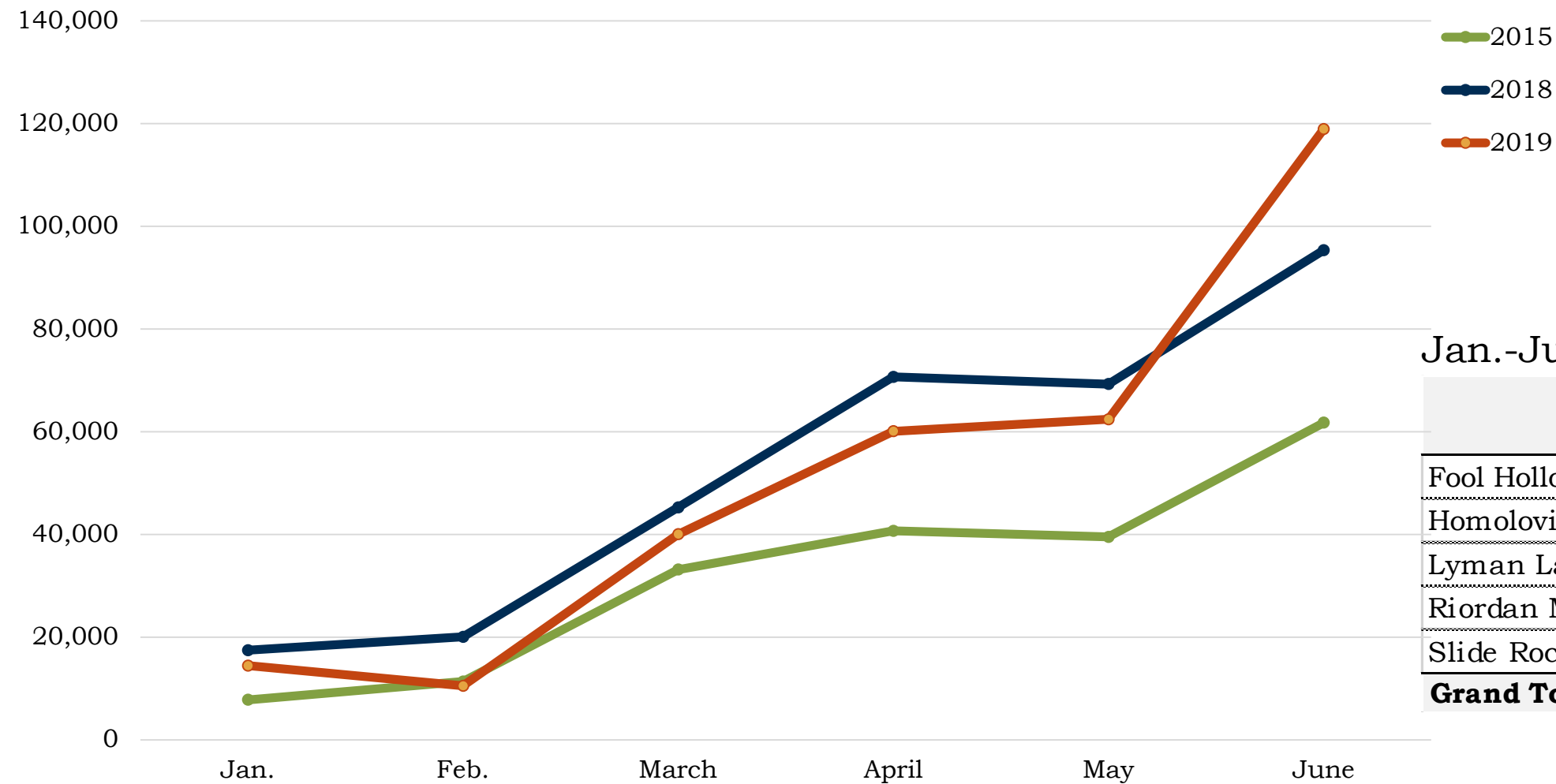
<http://tourism.az.gov/data-trends/>





# State Park Visitation

## Northern Region



Jan.-June YTD Visitation

	2019 YTD
Fool Hollow Lake RA	59,138
Homolovi Ruins SP	13,899
Lyman Lake SP	20,794
Riordan Mansion SHP	9,354
Slide Rock SP	203,148
Grand Total	306,333

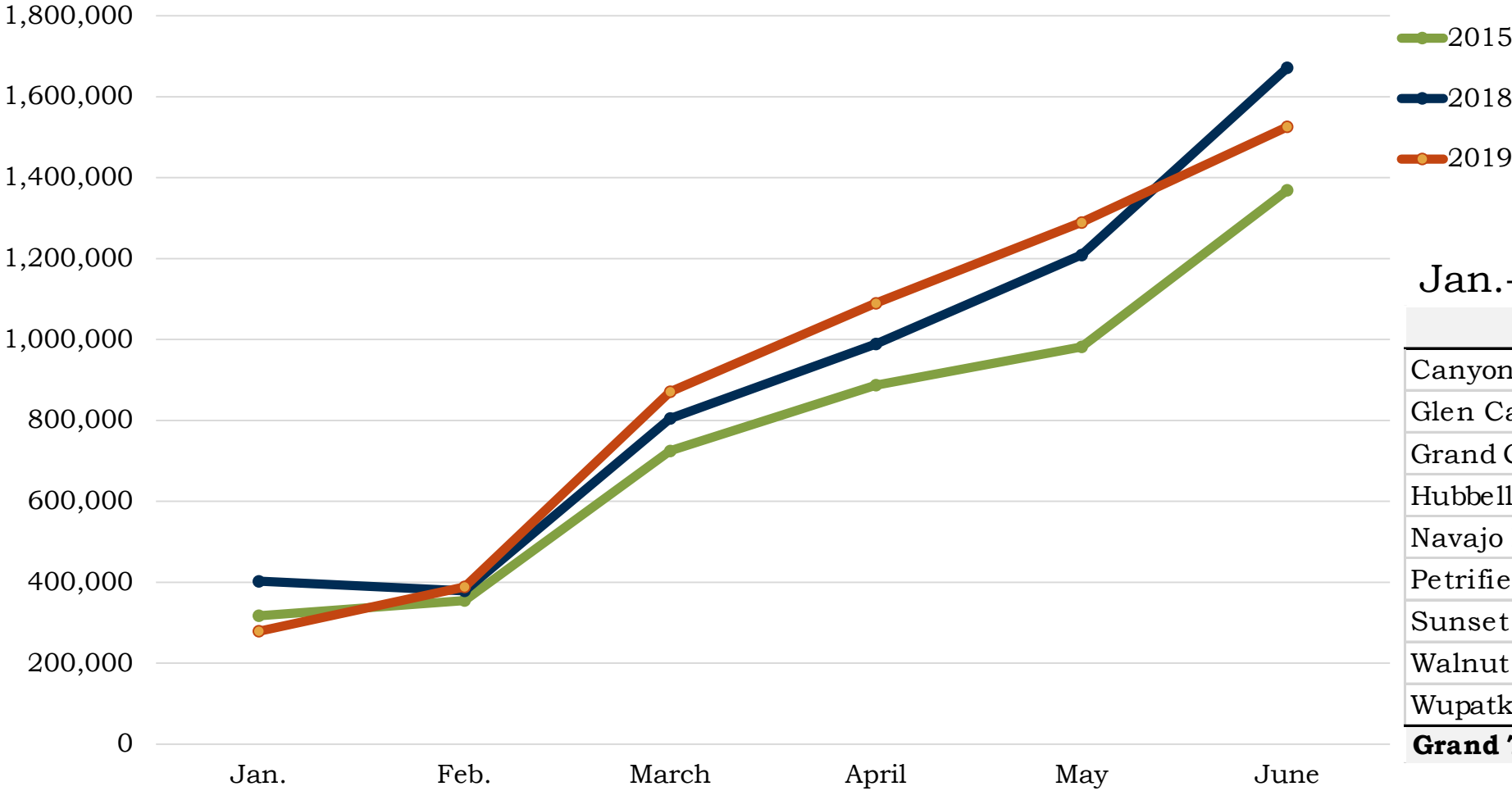
Source: Northern Arizona University, Arizona State Parks





# National Park Visitation

Northern Region



Jan.-June YTD Visitation

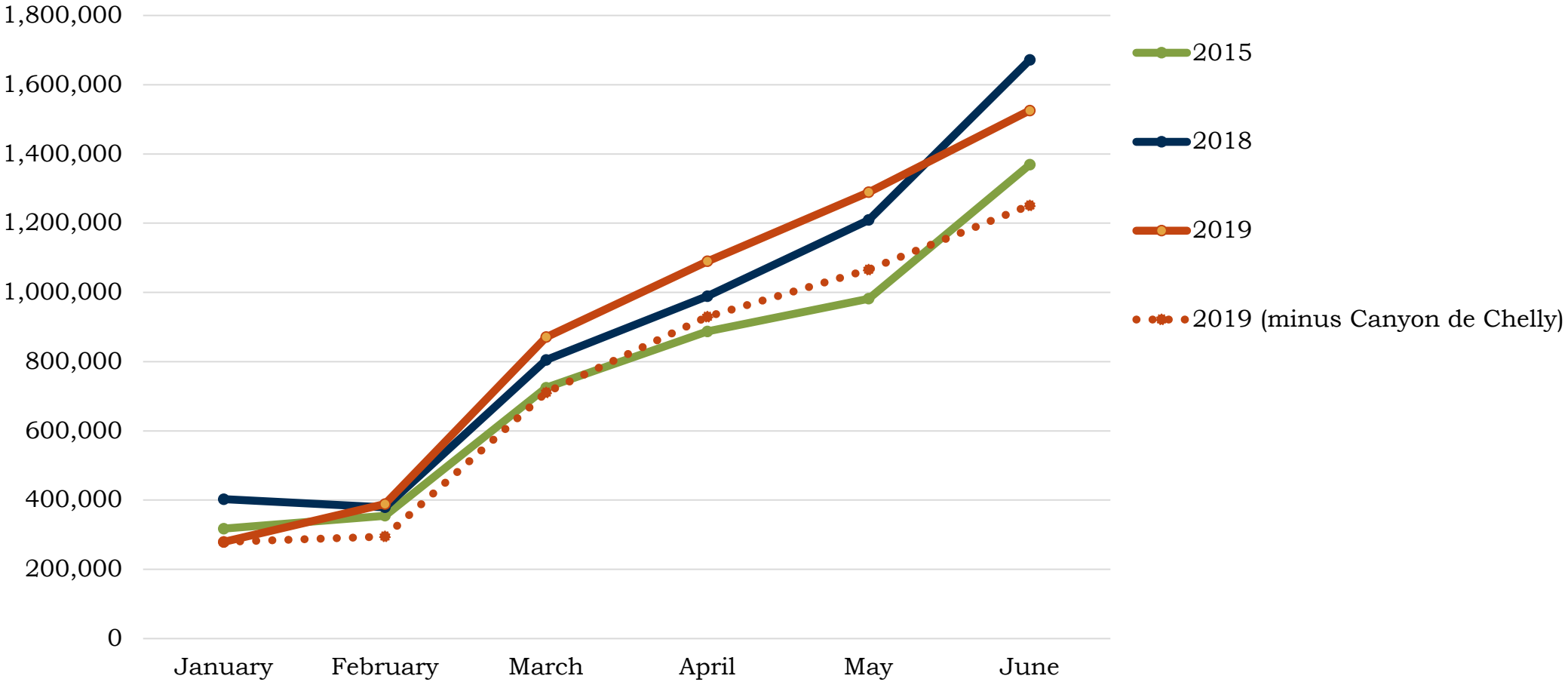
	2019 YTD
Canyon de Chelly NM	912,001
Glen Canyon NRA	1,248,873
Grand Canyon NP	2,714,018
Hubbell Trading Post NHS	21,164
Navajo NM	22,971
Petrified Forest NP	316,691
Sunset Crater Volcano NM	54,415
Walnut Canyon NM	74,854
Wupatki NM	78,411
Grand Total	5,443,398

Source: Northern Arizona University, National Park Service



# National Park Visitation

## Northern Region

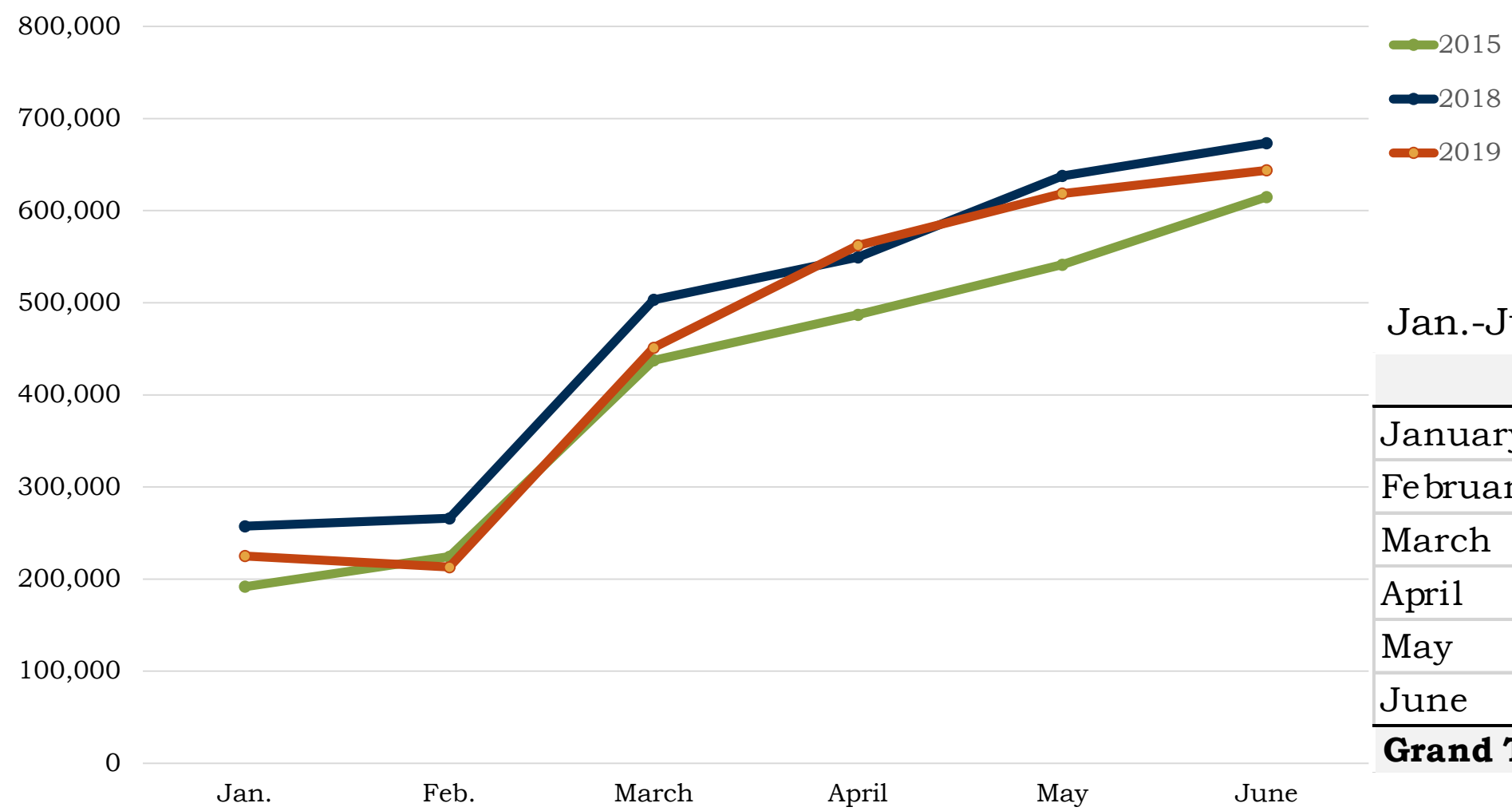


Source: Northern Arizona University, National Park Service



# Grand Canyon NP Visitation

Northern Region



Jan.-June YTD Visitation

	2019 YTD
January	225,056
February	213,050
March	451,228
April	562,265
May	618,598
June	643,821
Grand Total	2,714,018

Source: Northern Arizona University, National Park Service

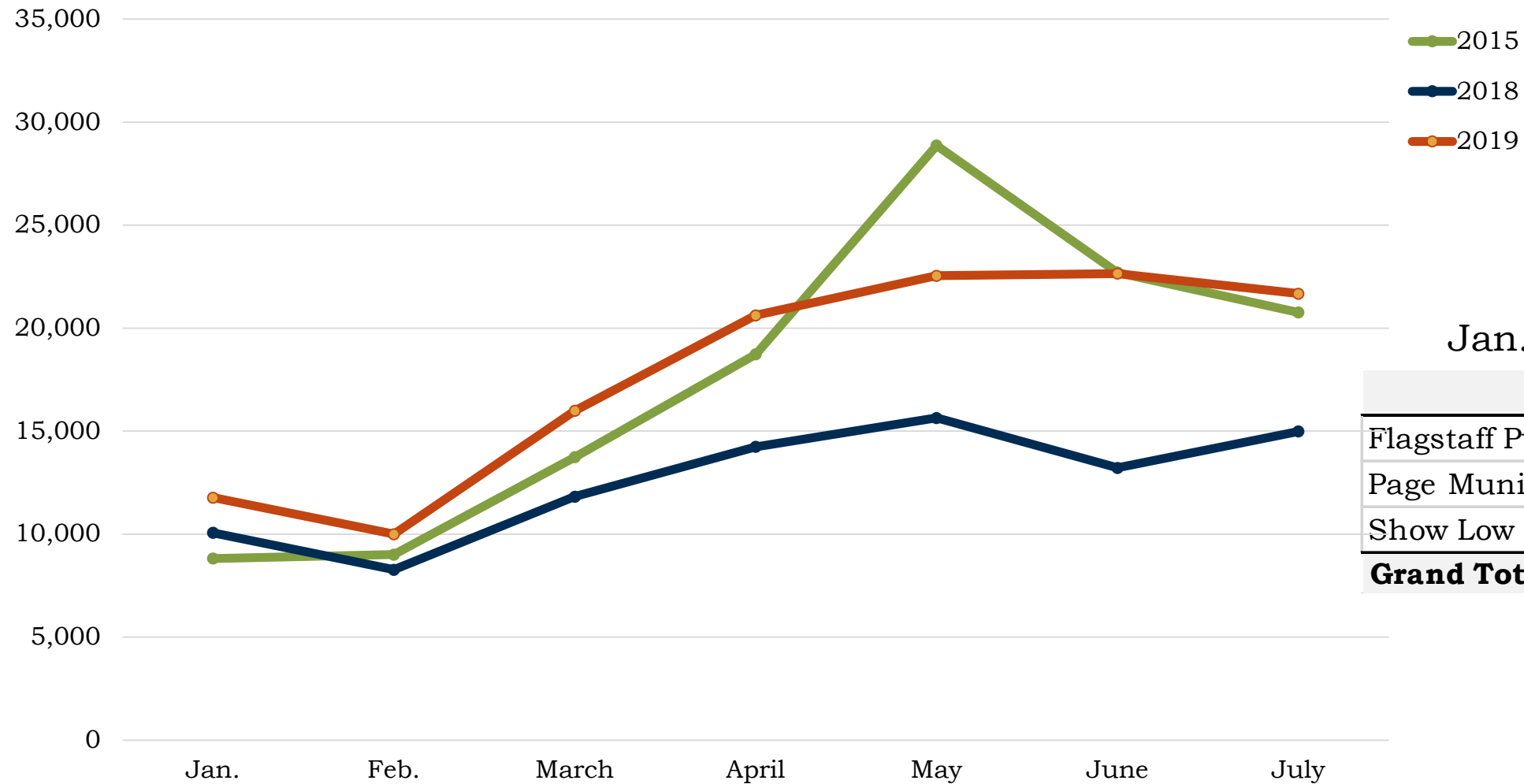


# National Park Visitation

- Why the decrease?
  - Leveling out after peak visitation from NPS Centennial
  - Trade war with China
    - Group cancellations; FIT market appears unaffected
  - Security concerns
  - Strength of the dollar
  - Domestic travel trending toward a slowdown

# Airport Passenger Volume

## Northern Region



Jan.-July YTD Volume

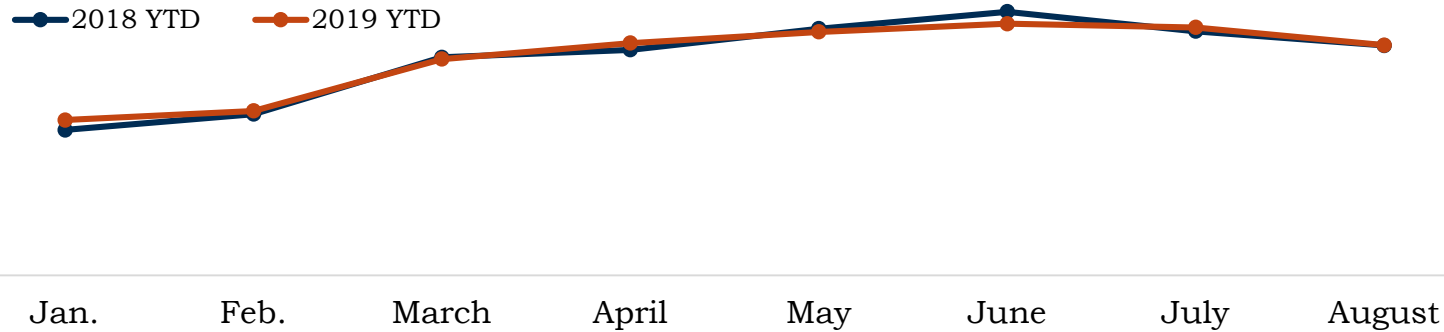
	2019 YTD
Flagstaff Pulliam	109,574
Page Municipal	11,413
Show Low Regional	4,284
<b>Grand Total</b>	<b>125,271</b>





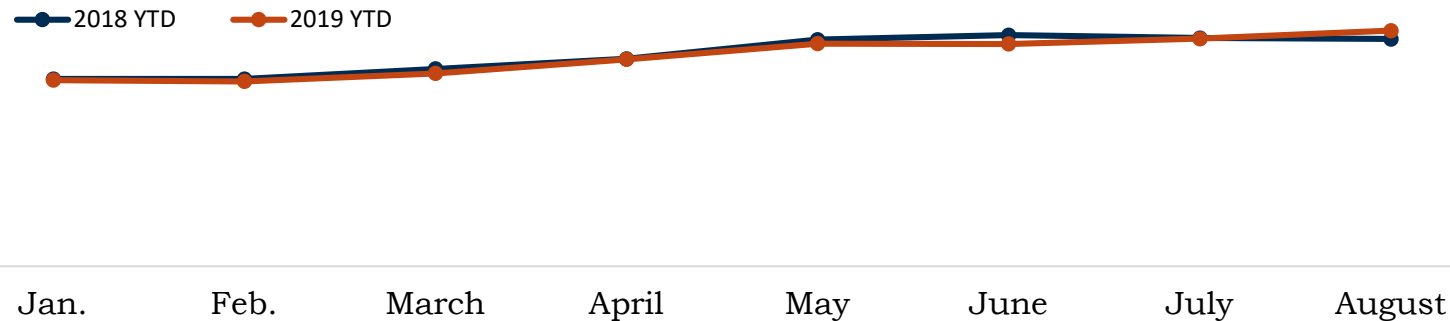
# Lodging Indicators

## Apache County



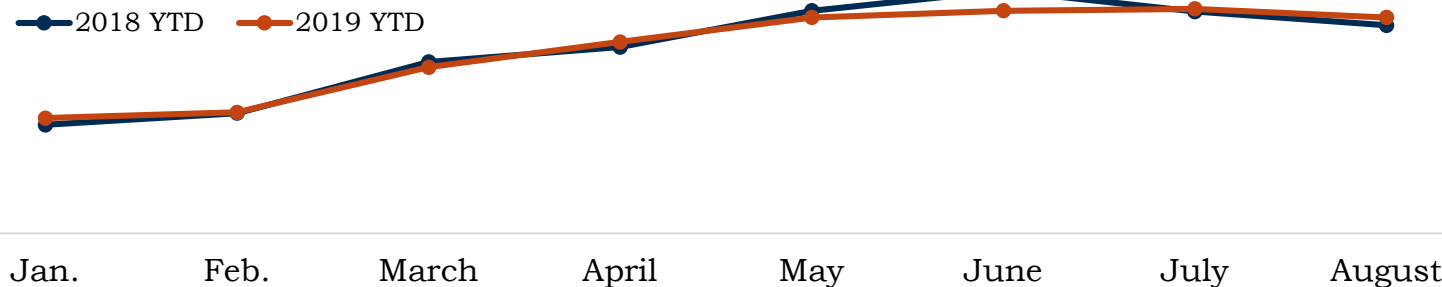
### Occupancy

YTD Change = 0.4%



### ADR

YTD Change = -0.9%



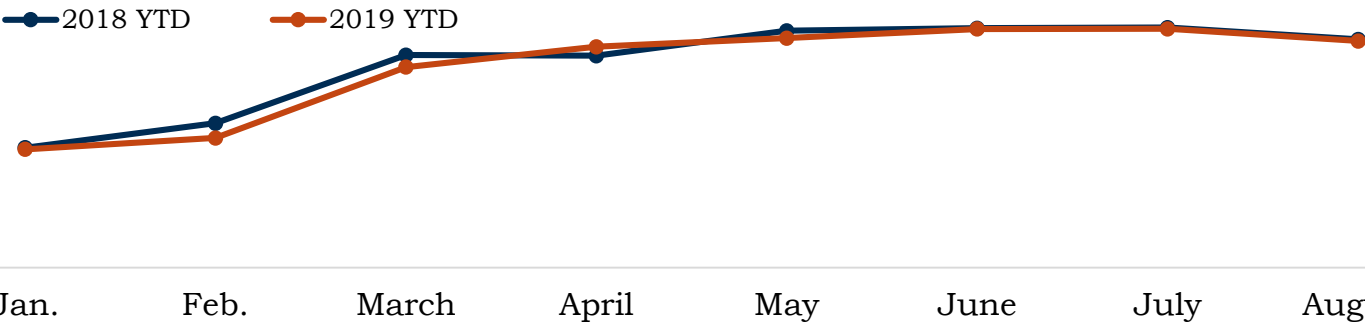
### RevPAR

YTD Change = -0.6%

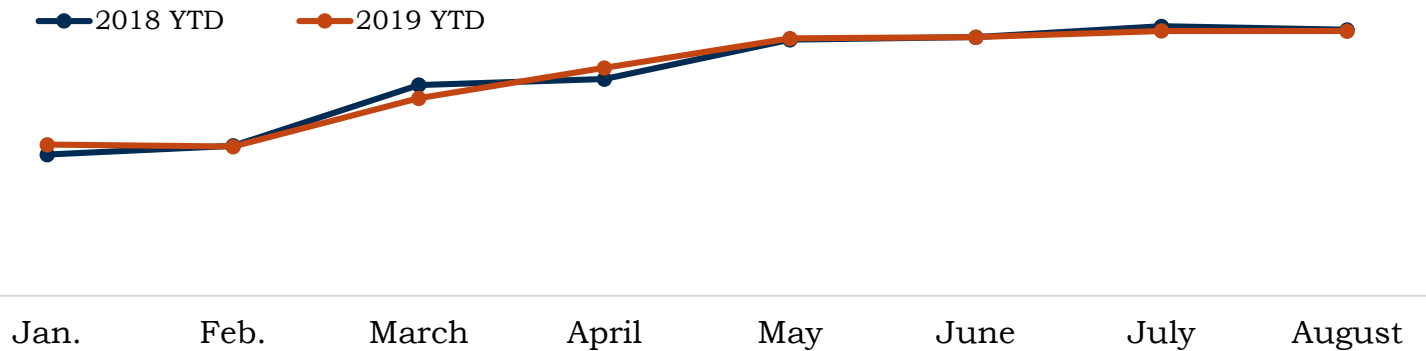


# Lodging Indicators

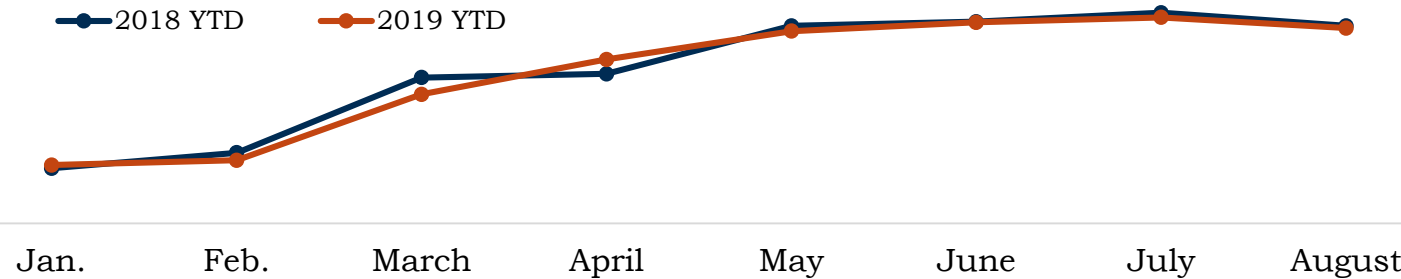
## Coconino County



**Occupancy**  
YTD Change = -1.8%



**ADR**  
YTD Change = 0.3%

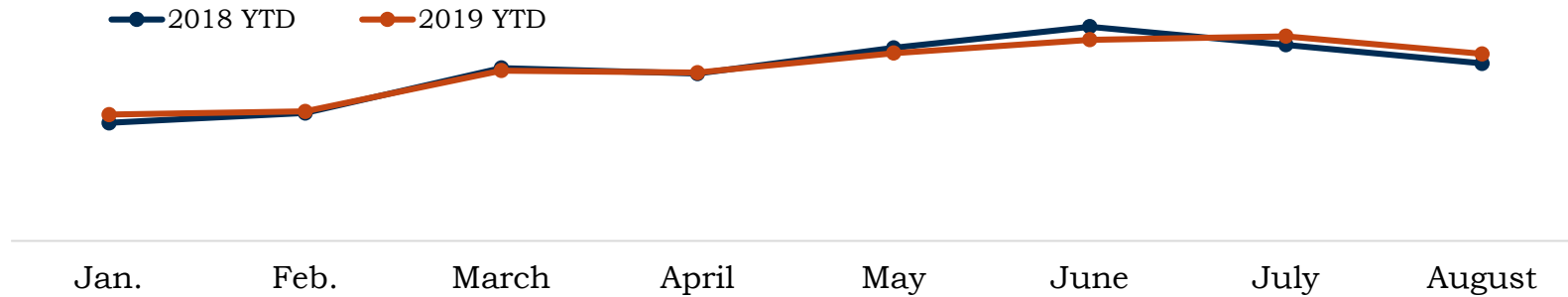


**RevPAR**  
YTD Change = -1.6%

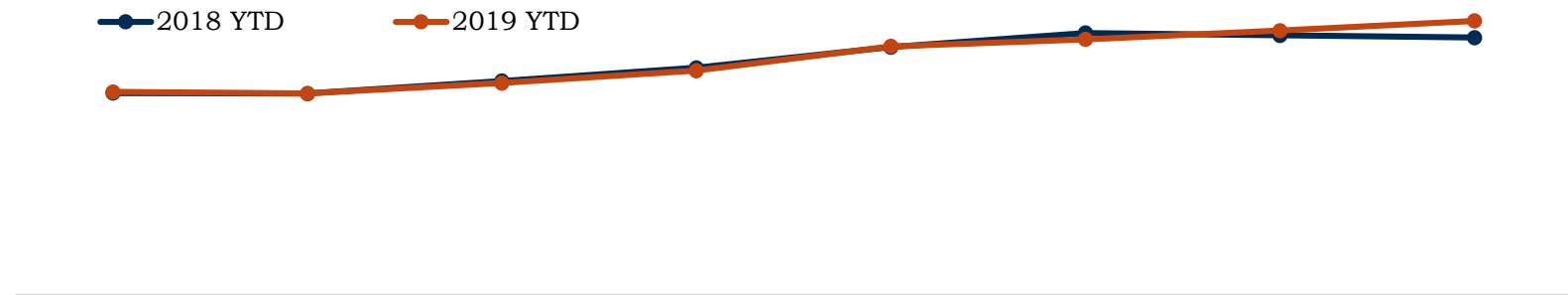


# Lodging Indicators

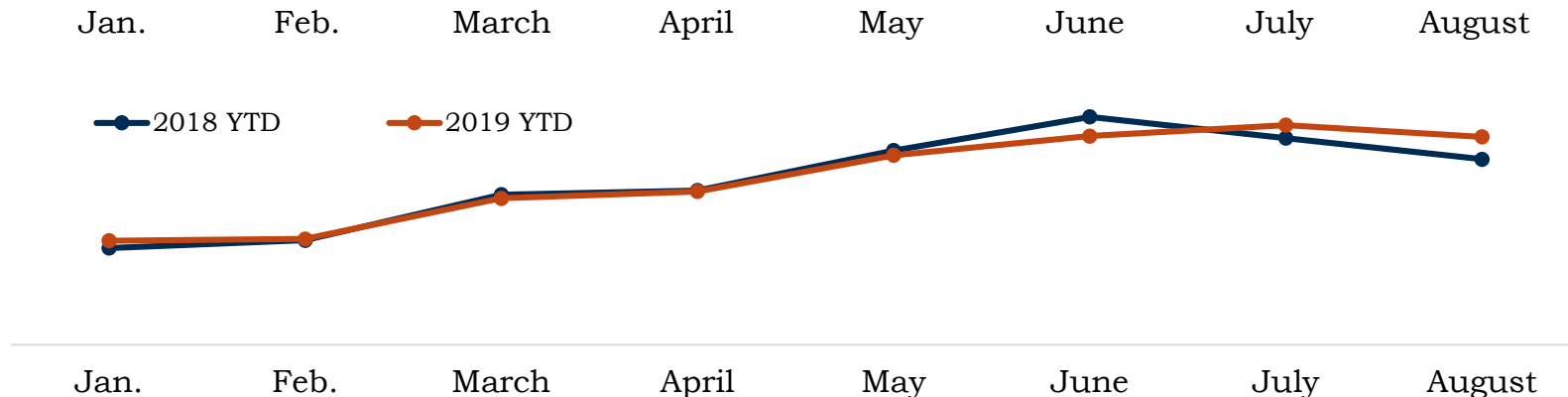
## Navajo County



**Occupancy**  
YTD Change = 0.5%



**ADR**  
YTD Change = 0.7%



**RevPAR**  
YTD Change = 1.2%



# 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](#)

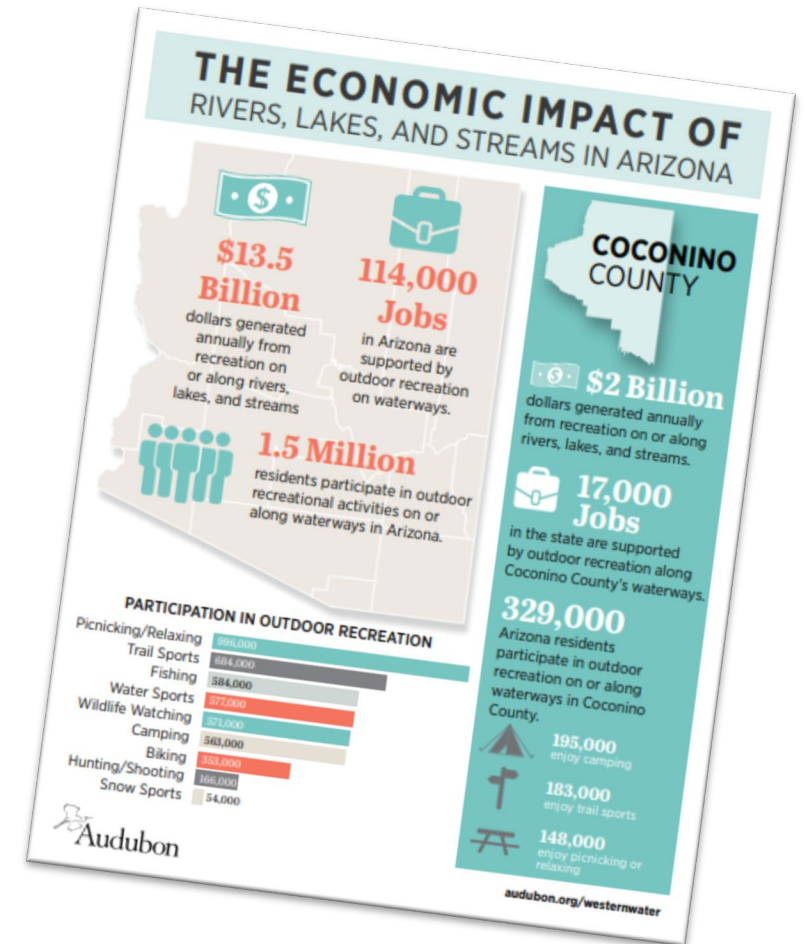
[Graham County: 2006-2018](#)

[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 Stream](#)







# Additional Data Sources

- National Park Service - [Economic Contributions of National Park Visitor Spending](#)

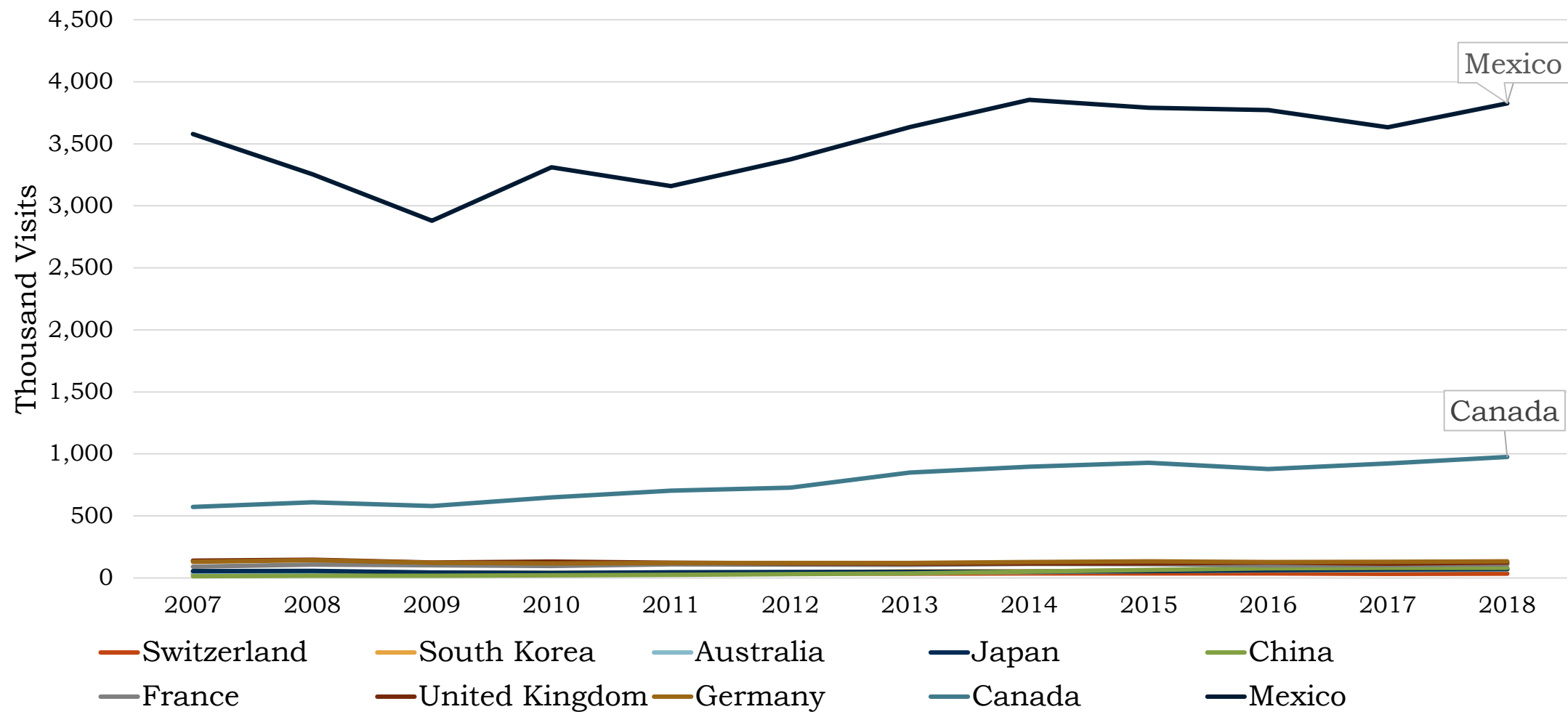
“In 2018, 6.4 million visitors spent an estimated \$947 million in local gateway regions while visiting Grand Canyon National Park.”



# International Visitation

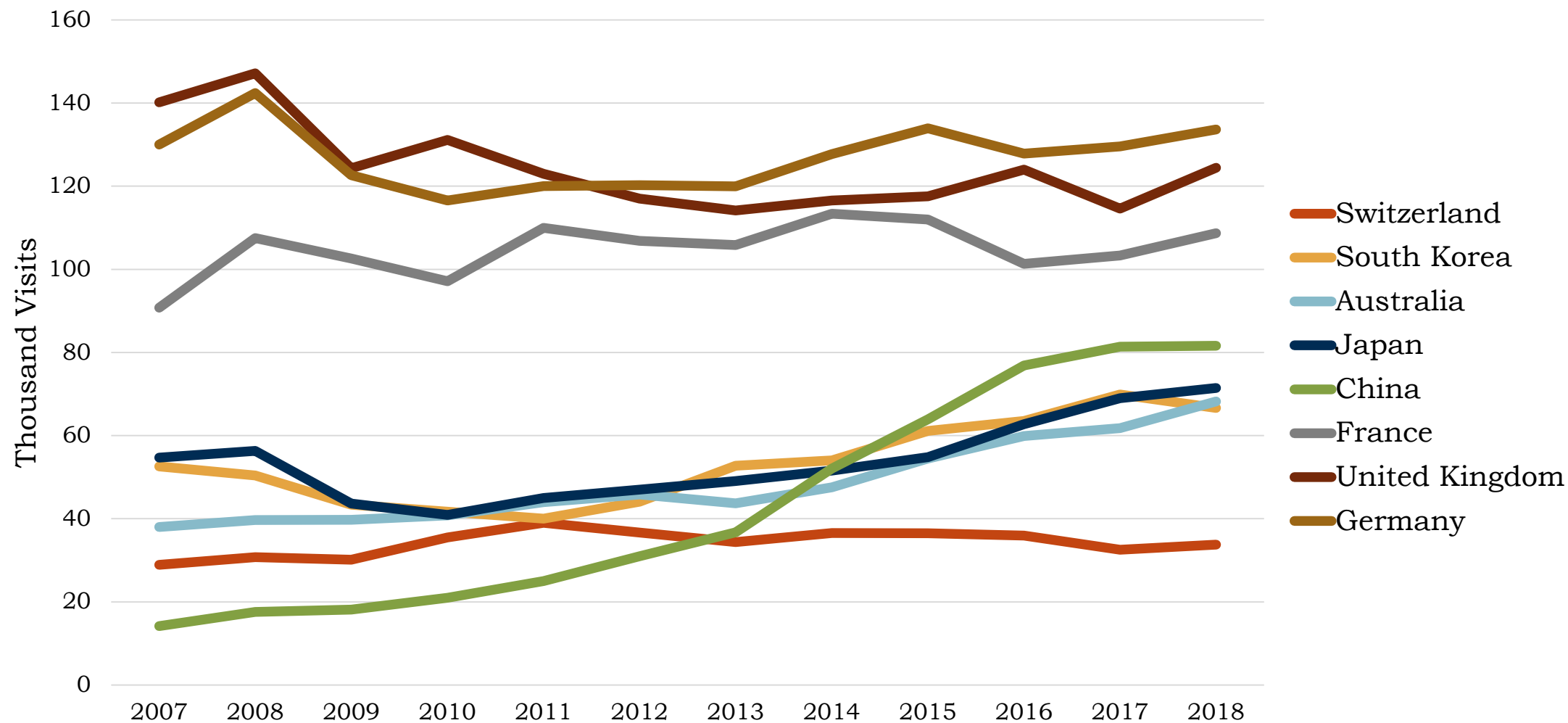


# Visitation to Arizona





# Visitation to Arizona Trend



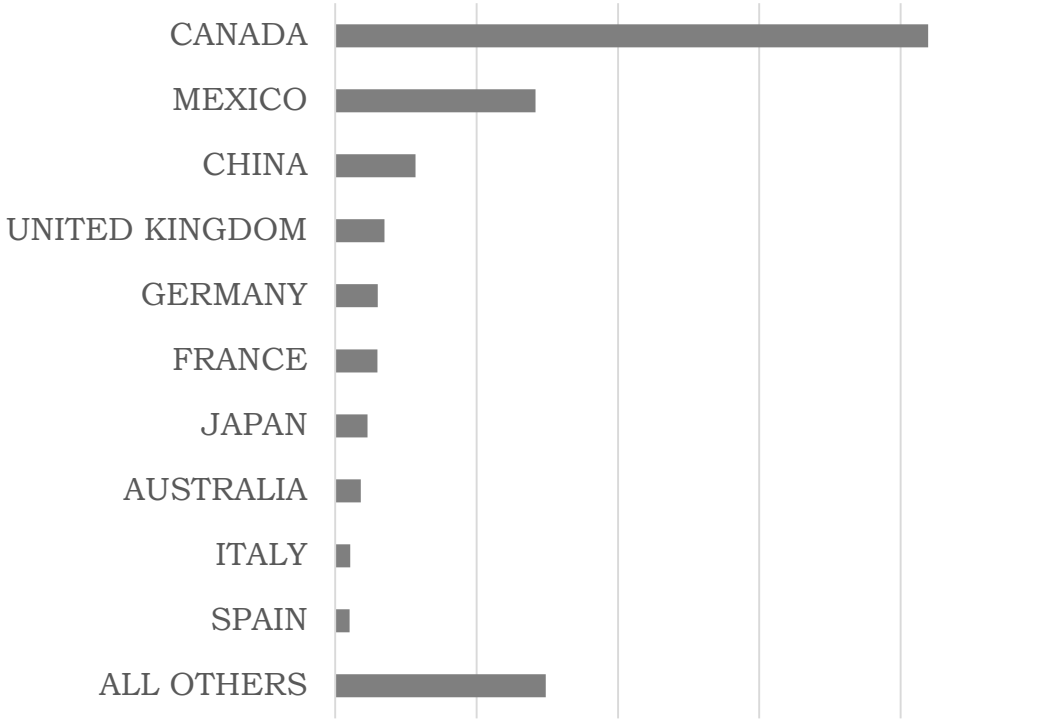
Source: Tourism Economics, 2018



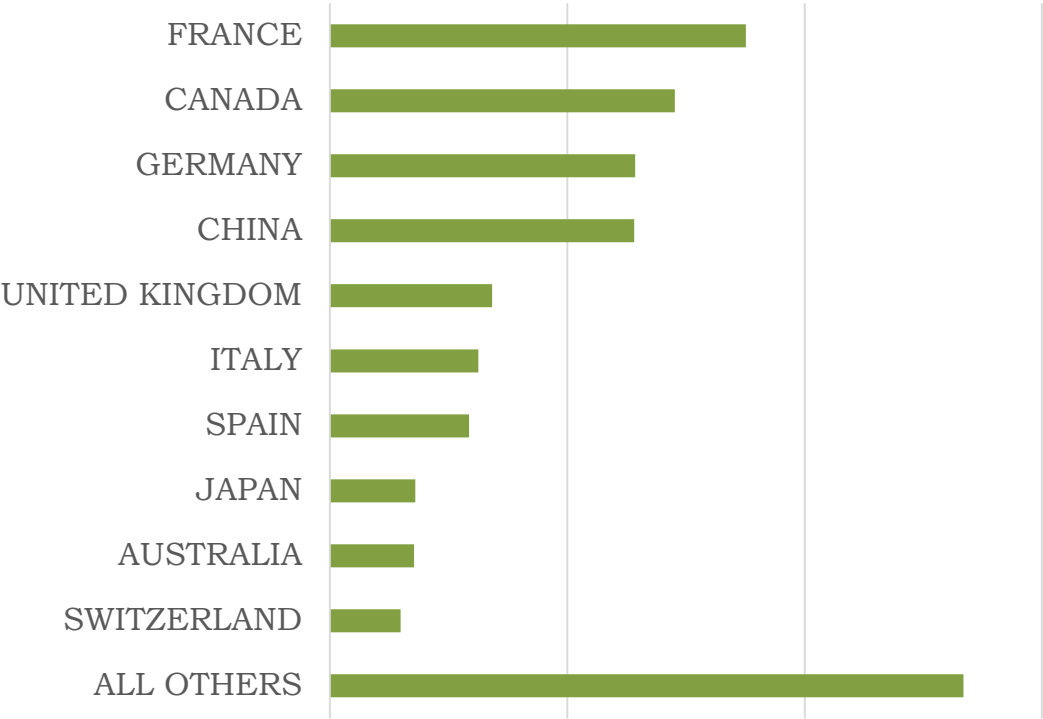
# Visa Card Spending Volume

YE 2018

## Arizona



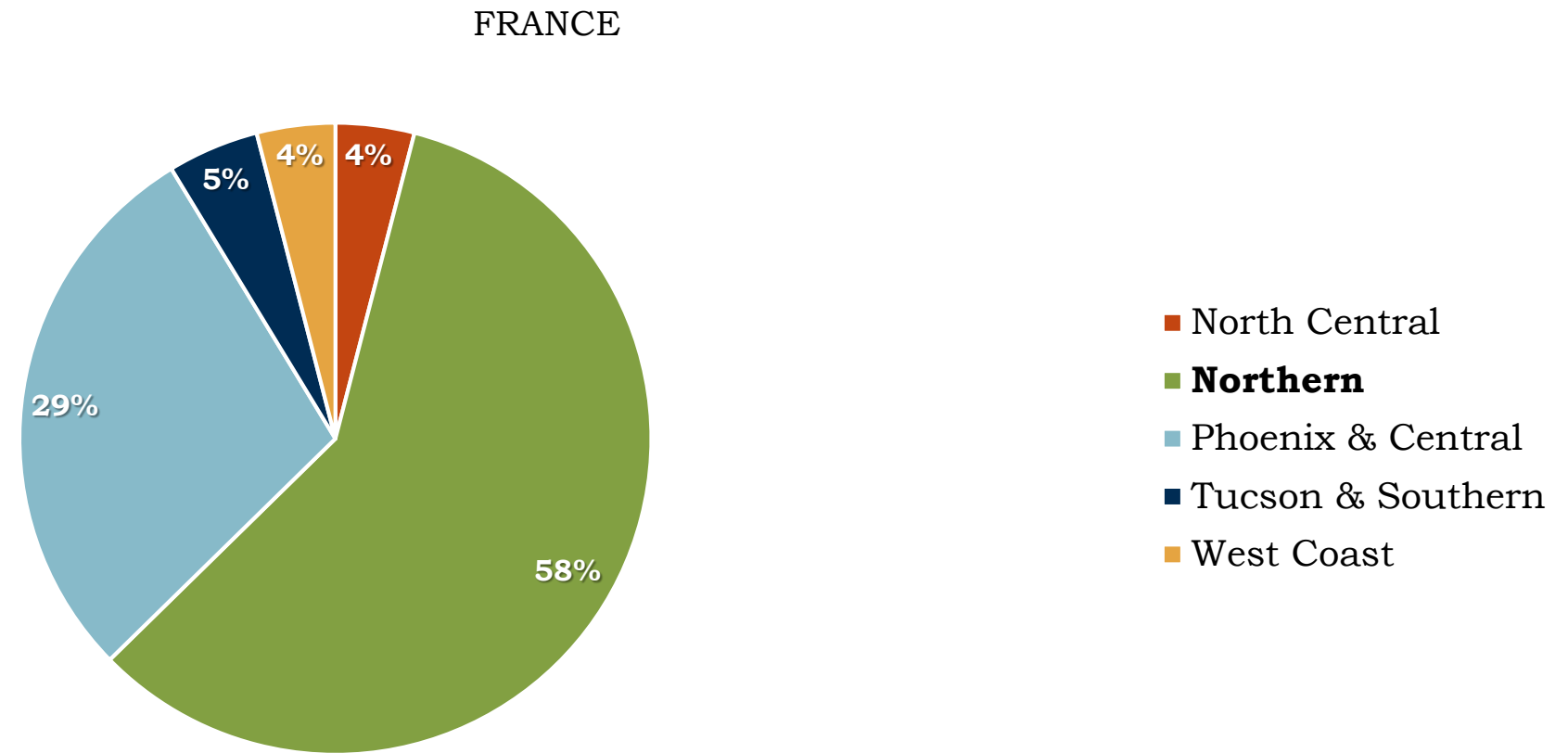
## Northern Region



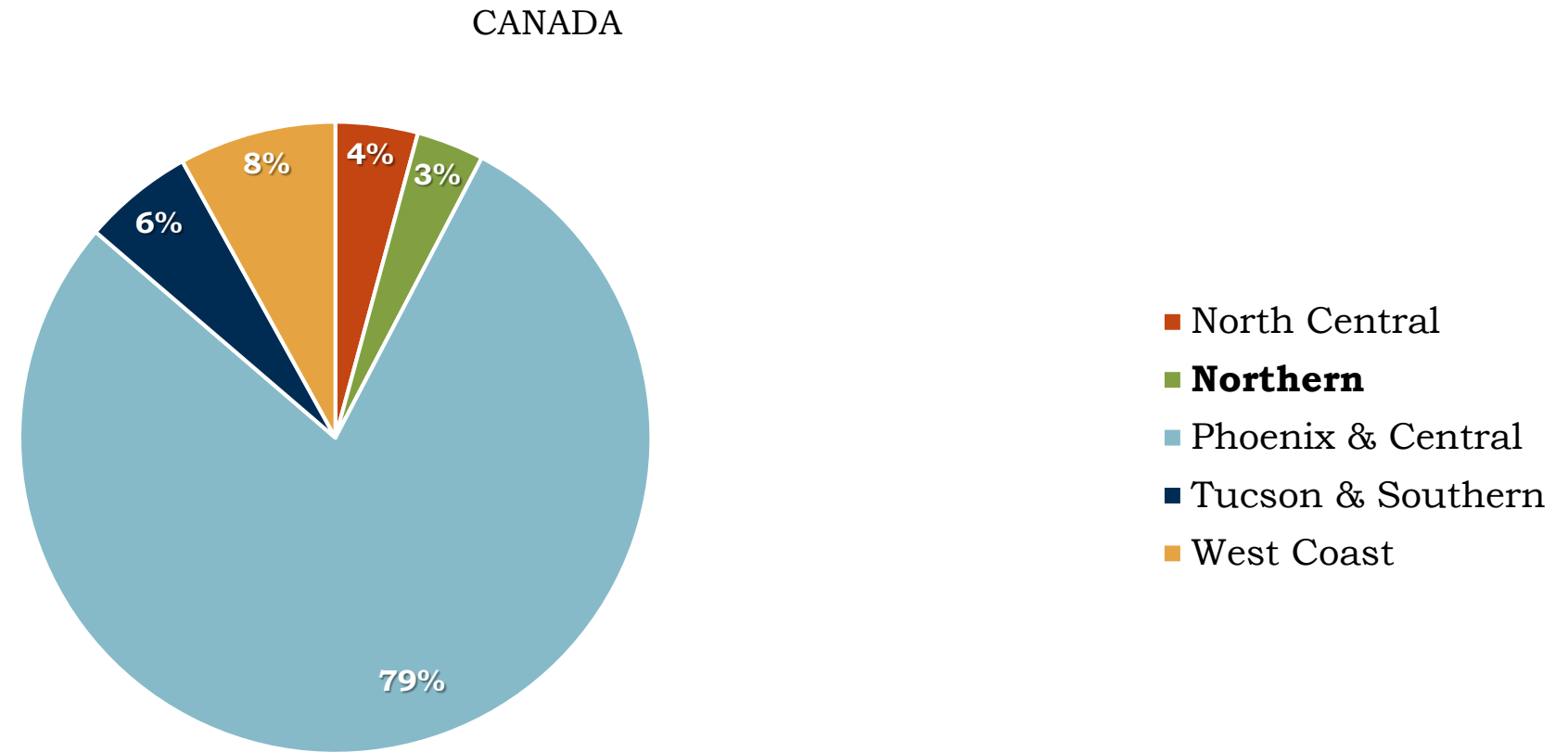
Source: VisaVue Travel, 2018



# Where do visitors spend the most?

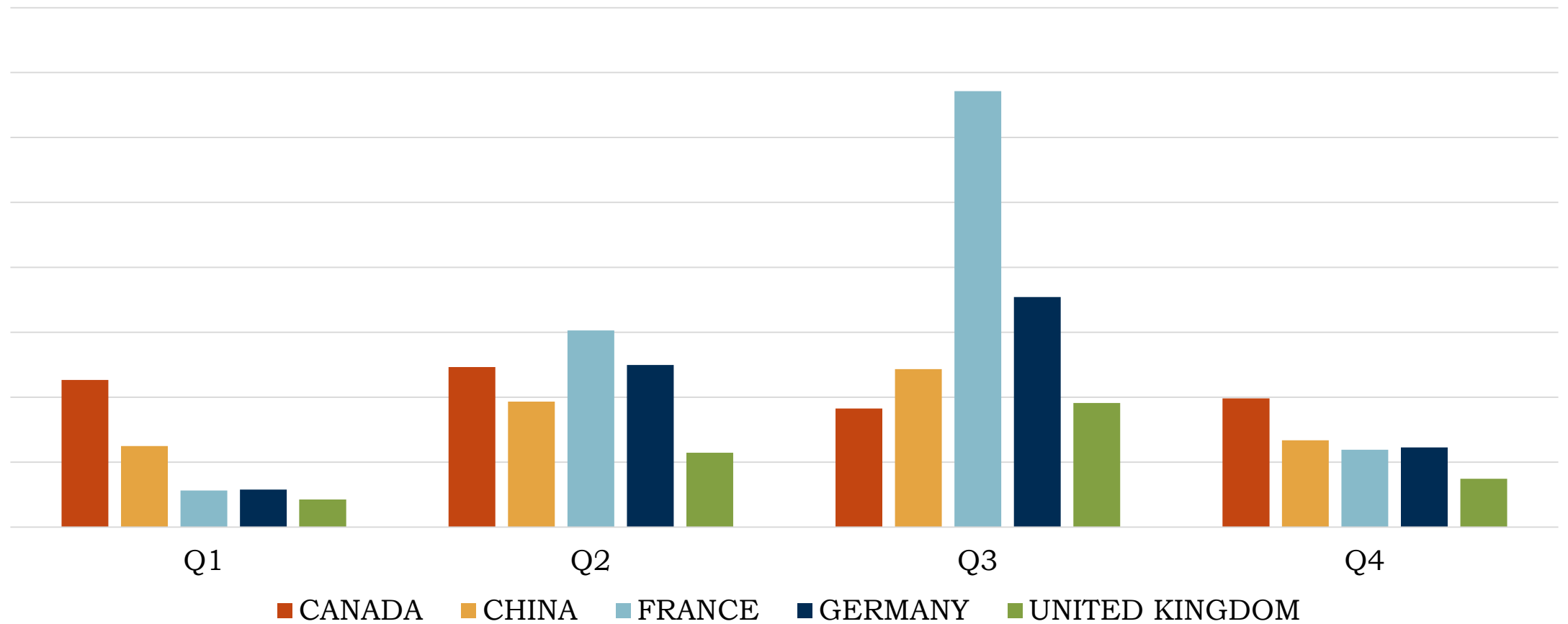


# Where do visitors spend the most?



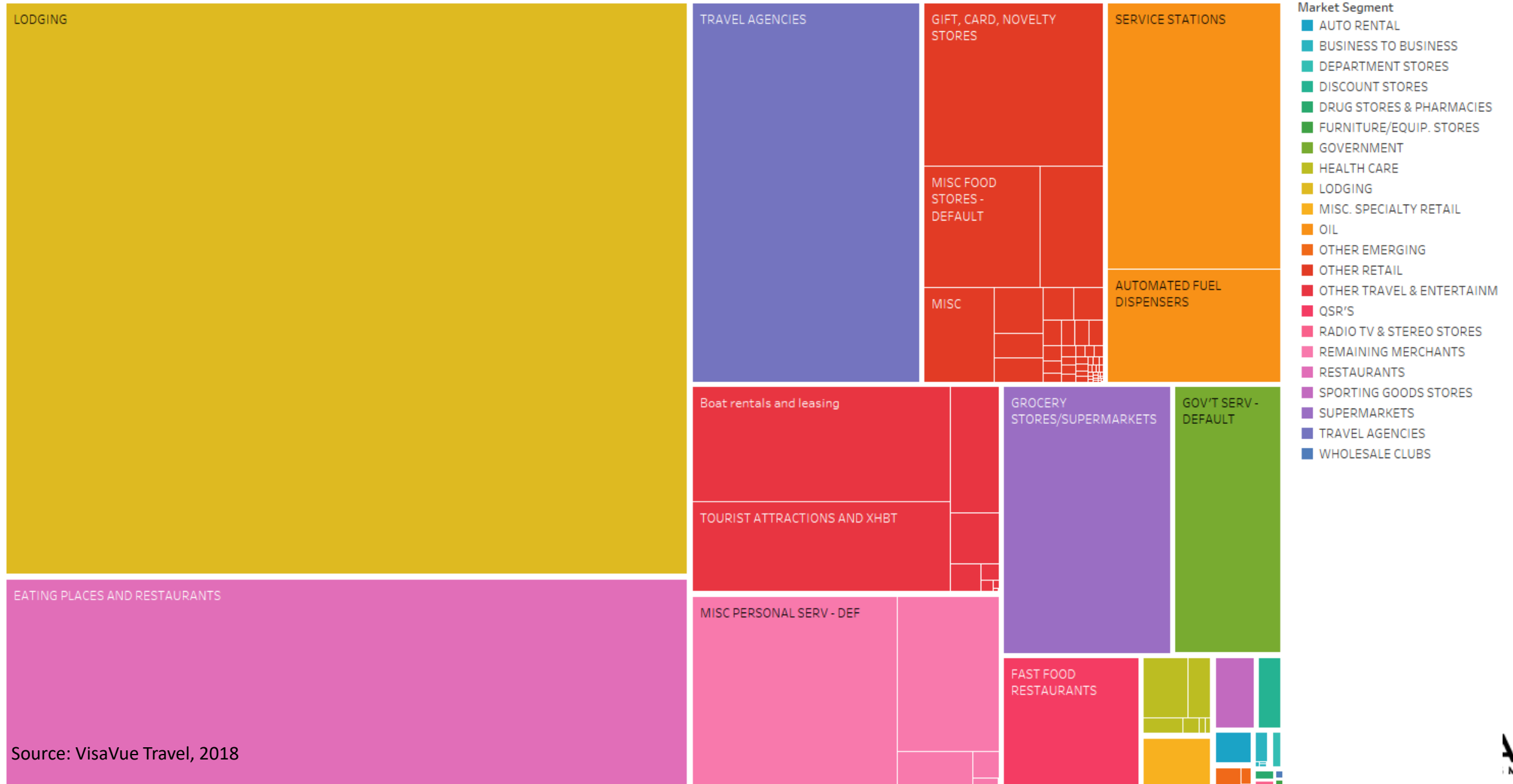


# Seasonal Spending





# France

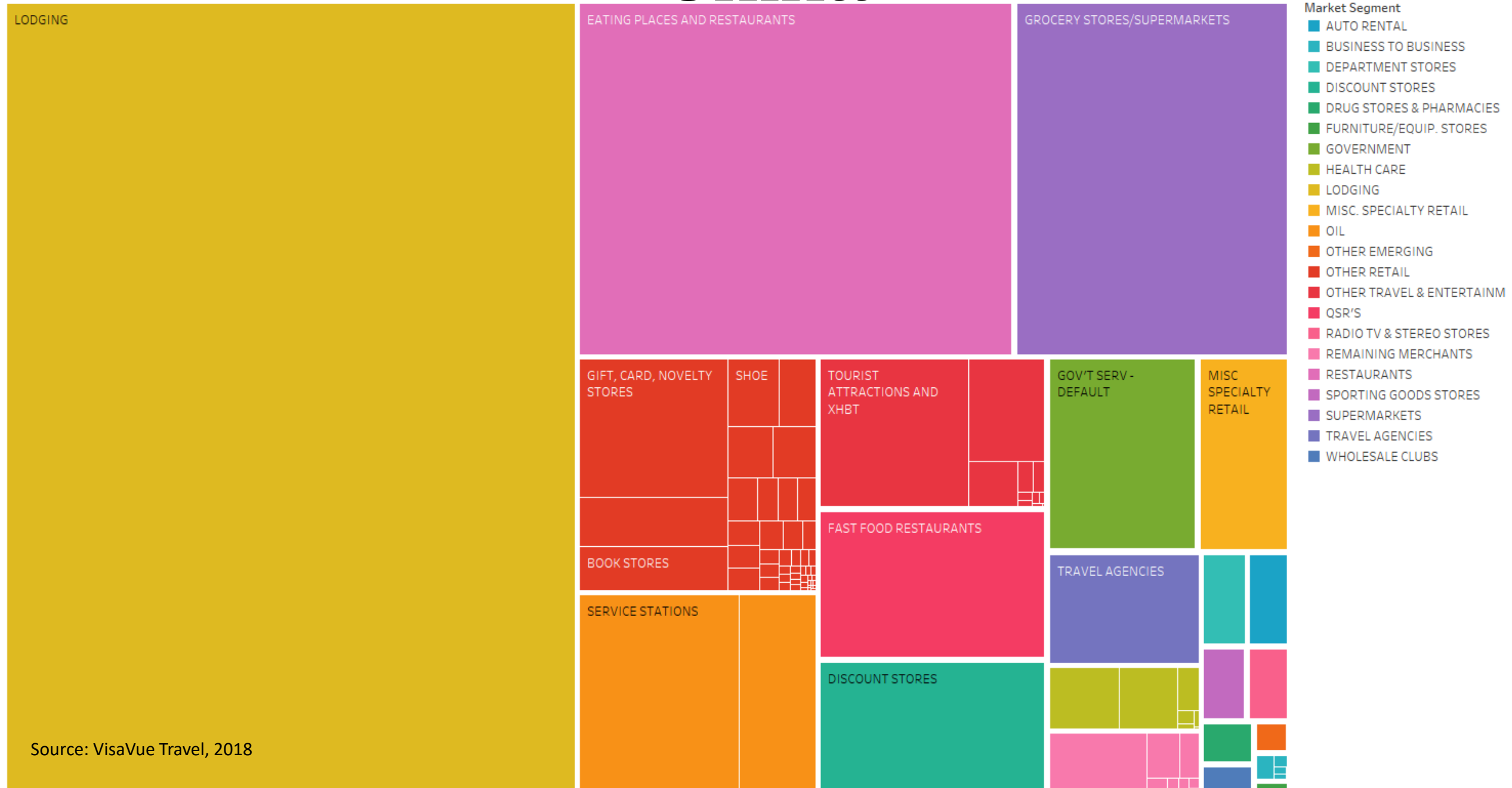


# Canada



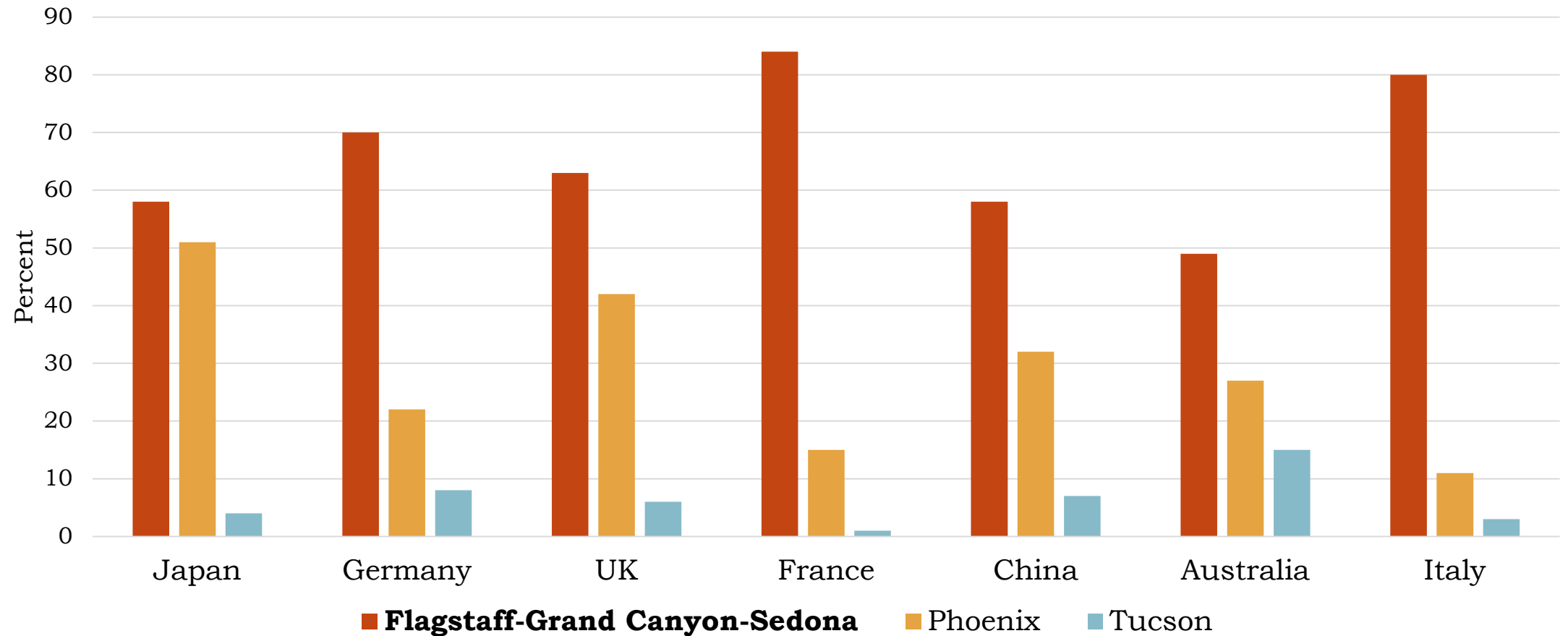


# China





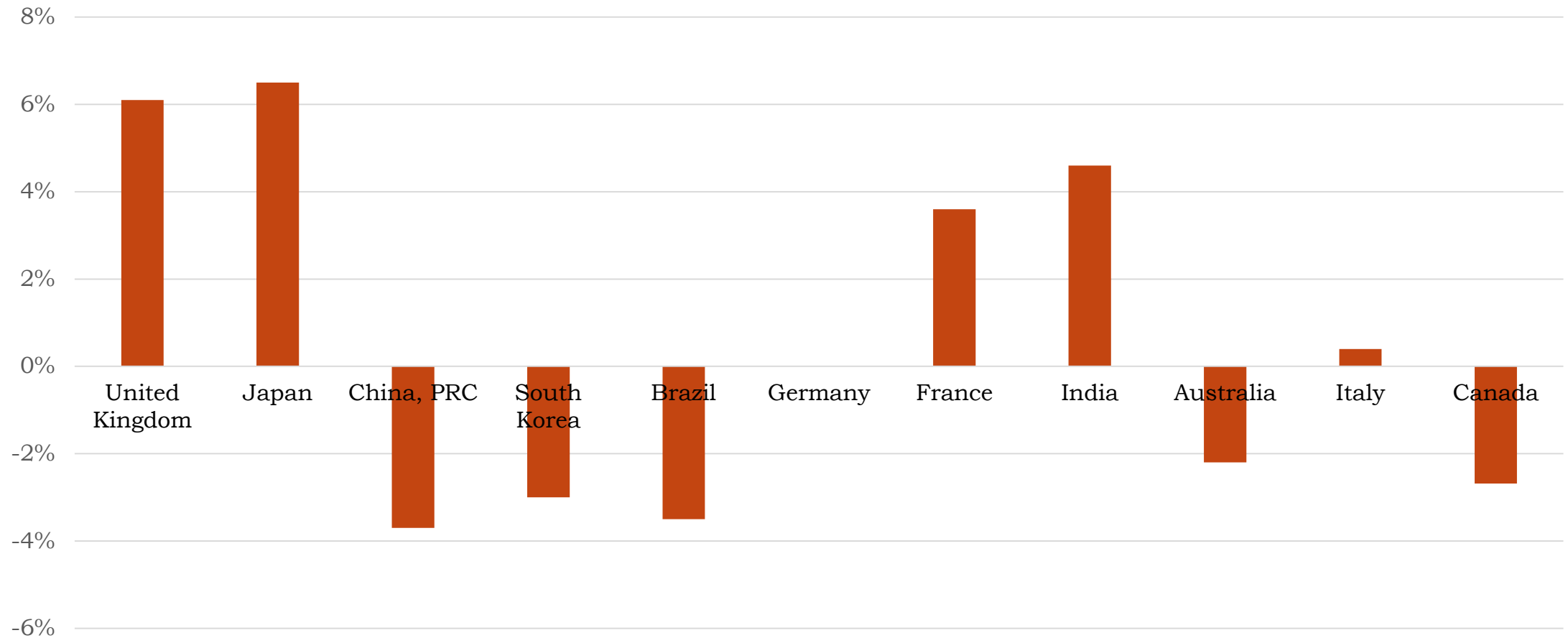
# Top Destinations in Arizona



# 2019 International Visitor Trends

# Arrivals to the U.S.

## % Change YTD July 2019\*

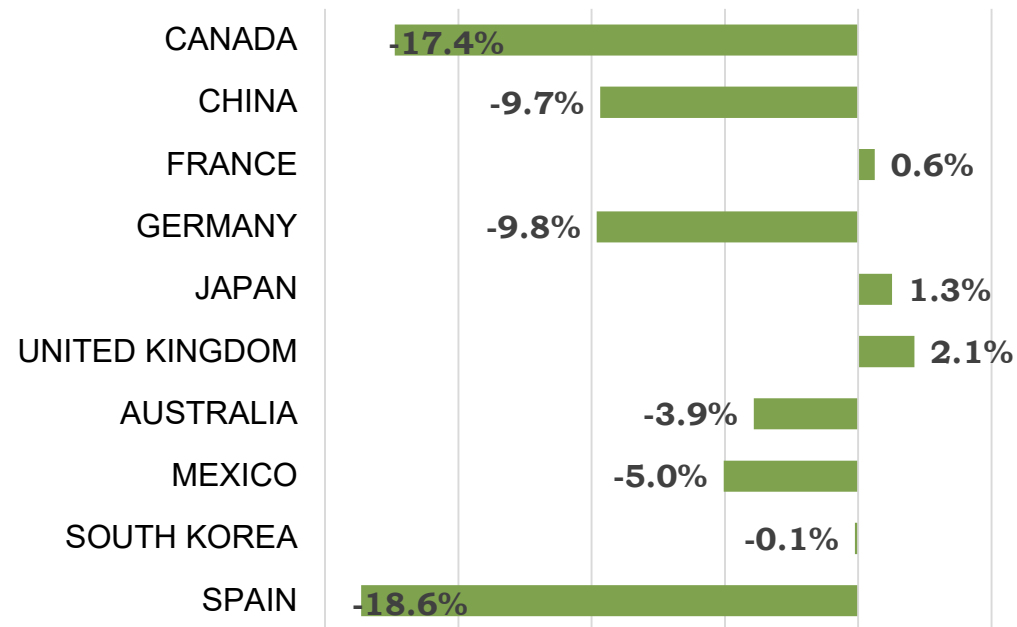


Source: National Travel and Tourism Office \*Canada arrivals are YTD June 2019

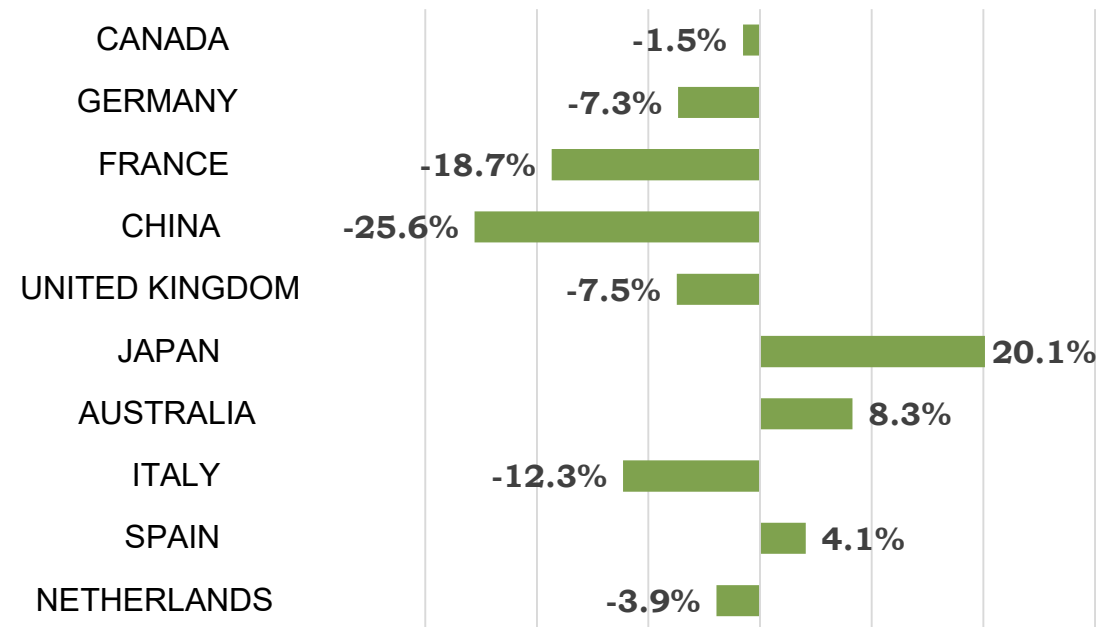
# International Visa Card Spending

## Northern Region

### Q1 2019 (January-March)



### Q2 2019 (April-June)





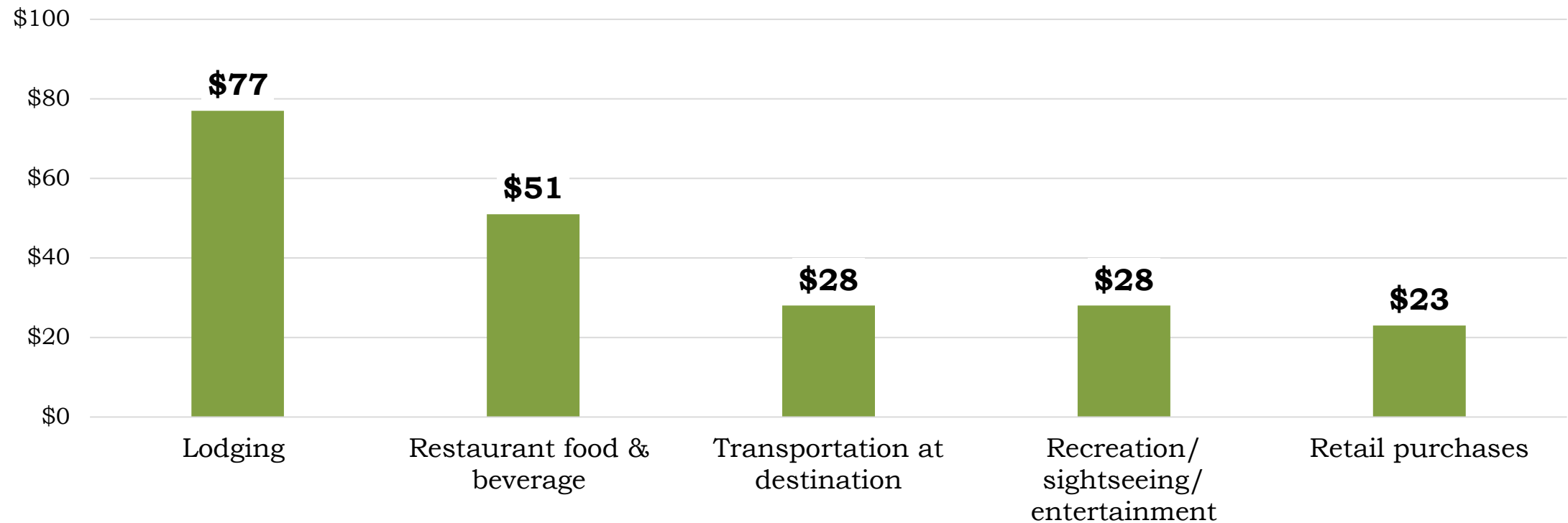
# Domestic Overnight Visitor Expenditures 2018

Northern Region



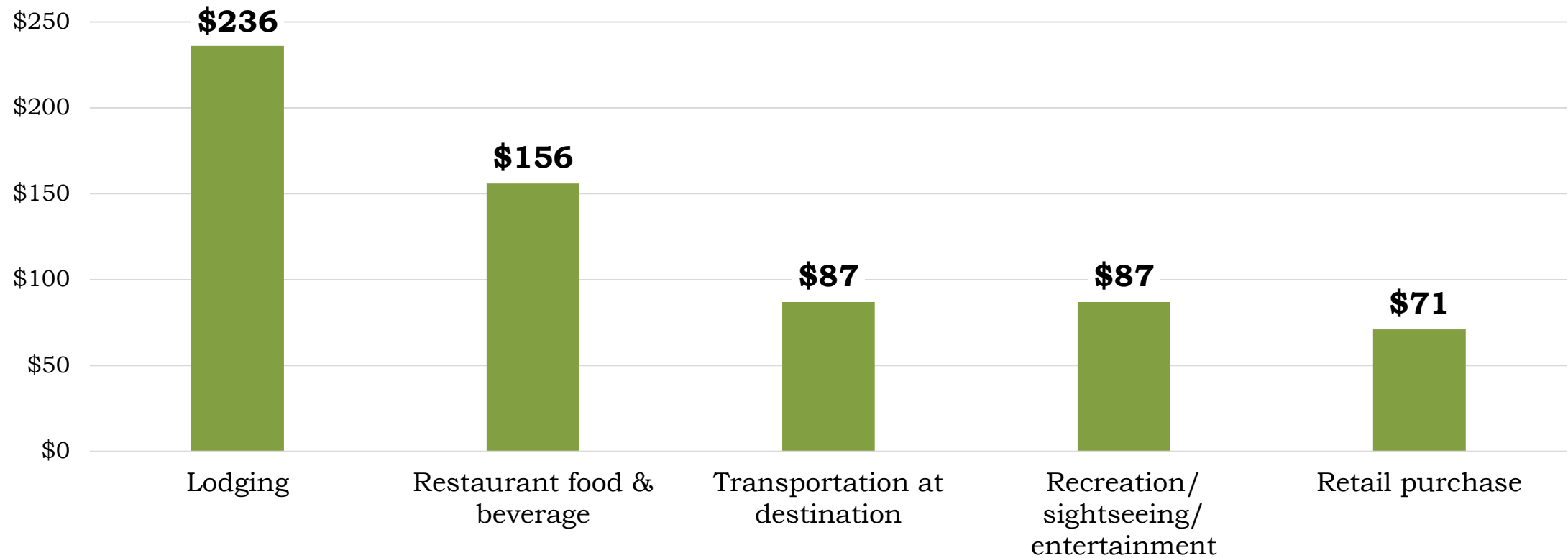
# Average Per-Person Expenditures on Domestic Overnight Trips

**Average Per Person \$207**



# Average Per-Party Expenditures on Domestic Overnight Trips

**Average Per Party \$637**





# Domestic Overnight Visitor Profile 2018

Northern Region

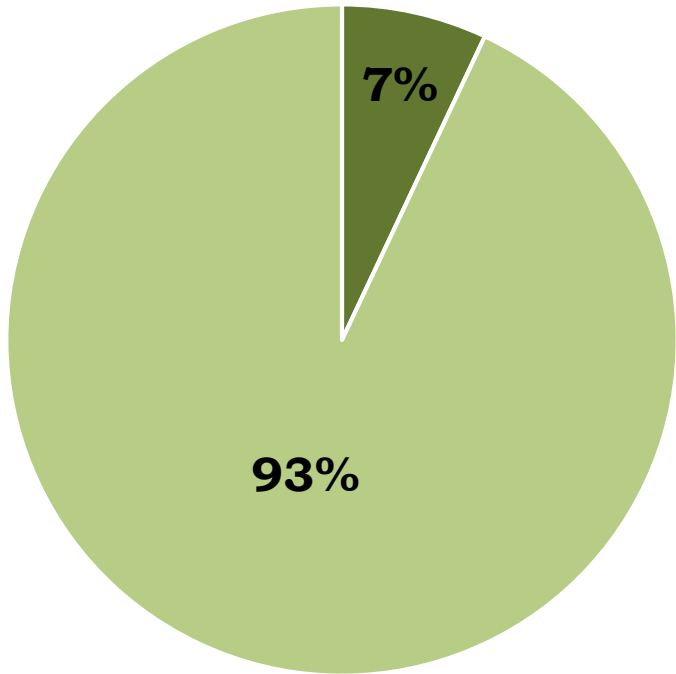




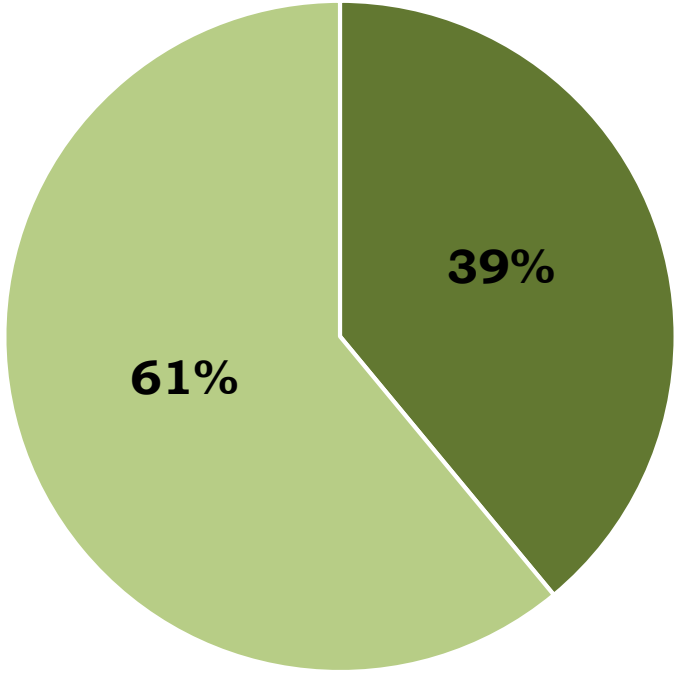


# 2018 Regional Domestic Visitor Profile

Northern Region



■ Business ■ Leisure



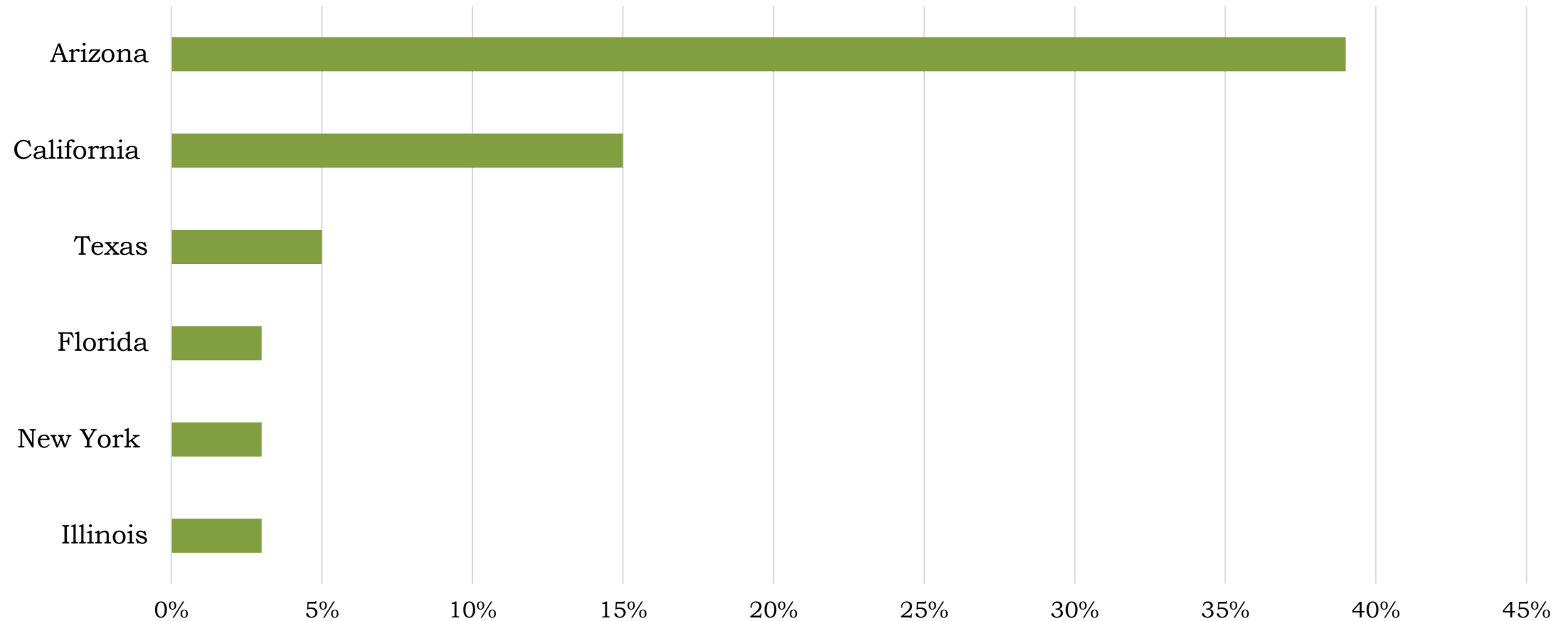
■ AZ Residents ■ Non-Residents

Source: Longwoods International, 2018



# State Origin of Overnight Trips

Northern Region

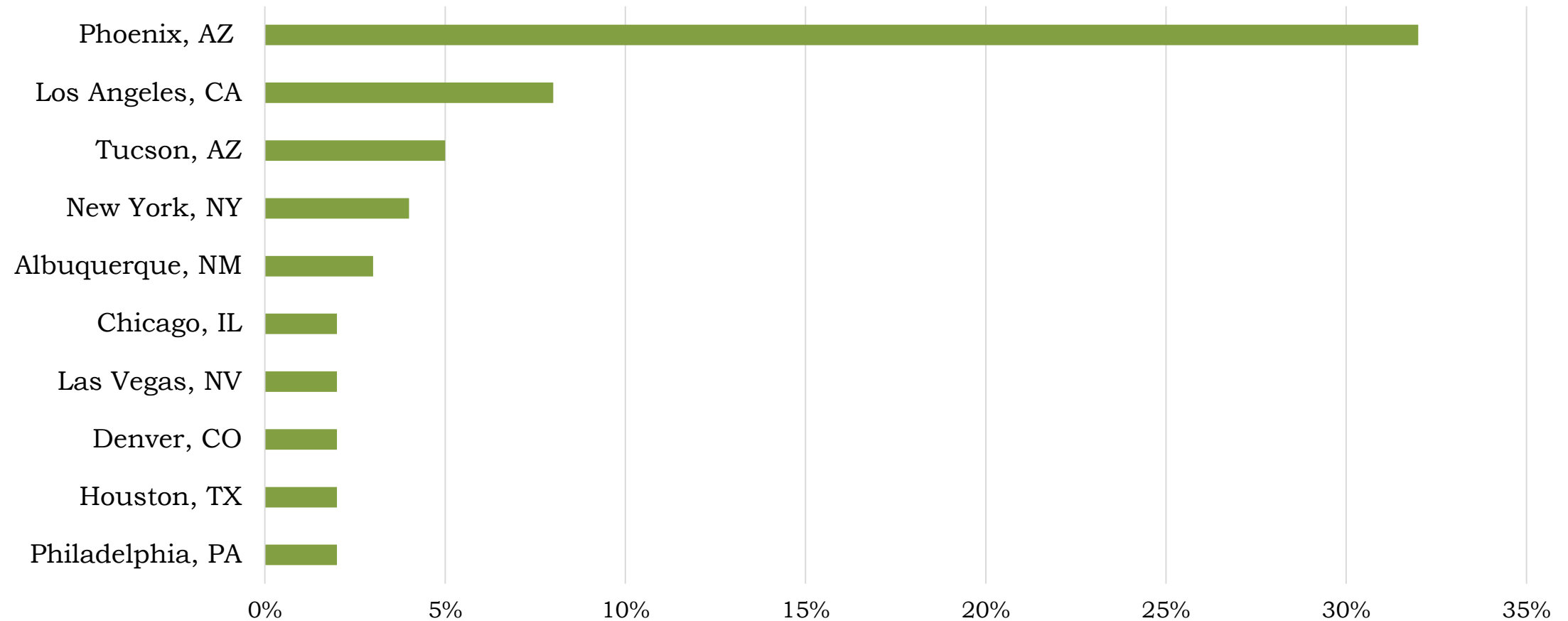


Source: Longwoods International, 2018



# DMA Origin of Overnight Trip

Northern Region

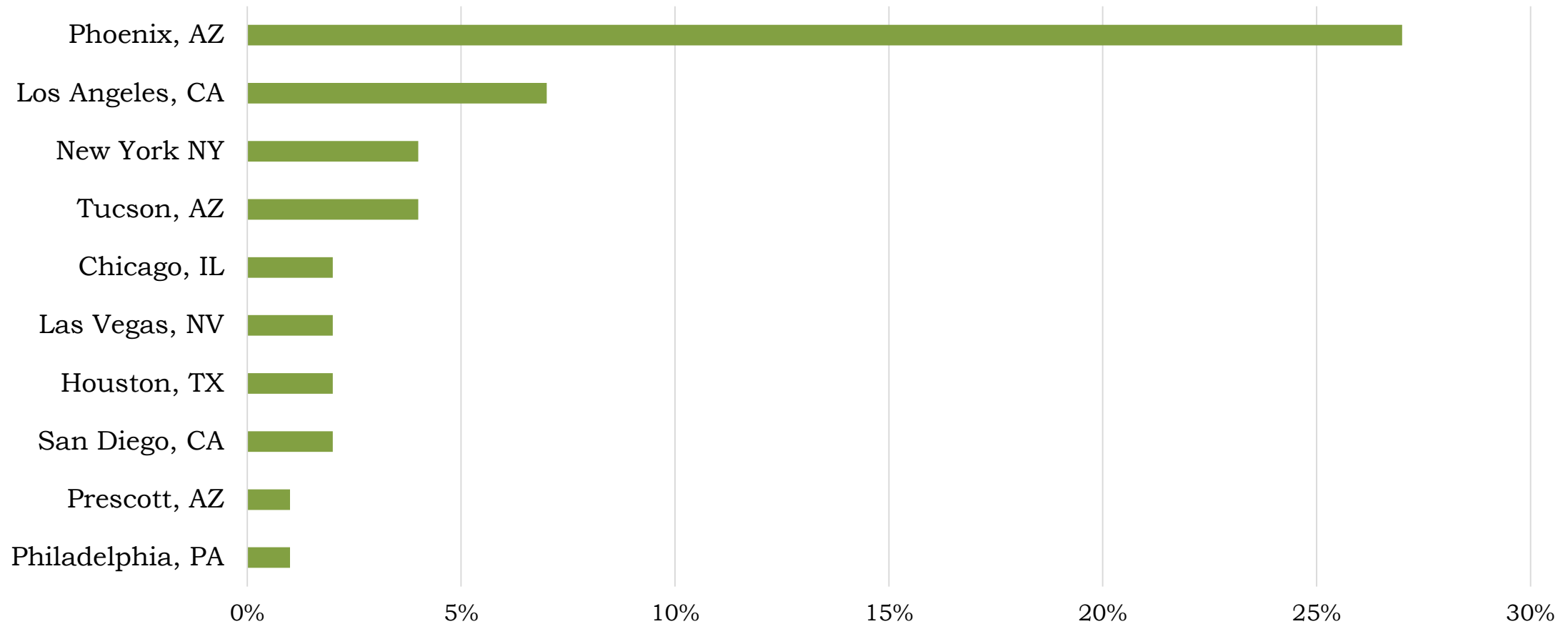


Source: Longwoods International, 2018



# MSA Origin of Overnight Trip

Northern Region

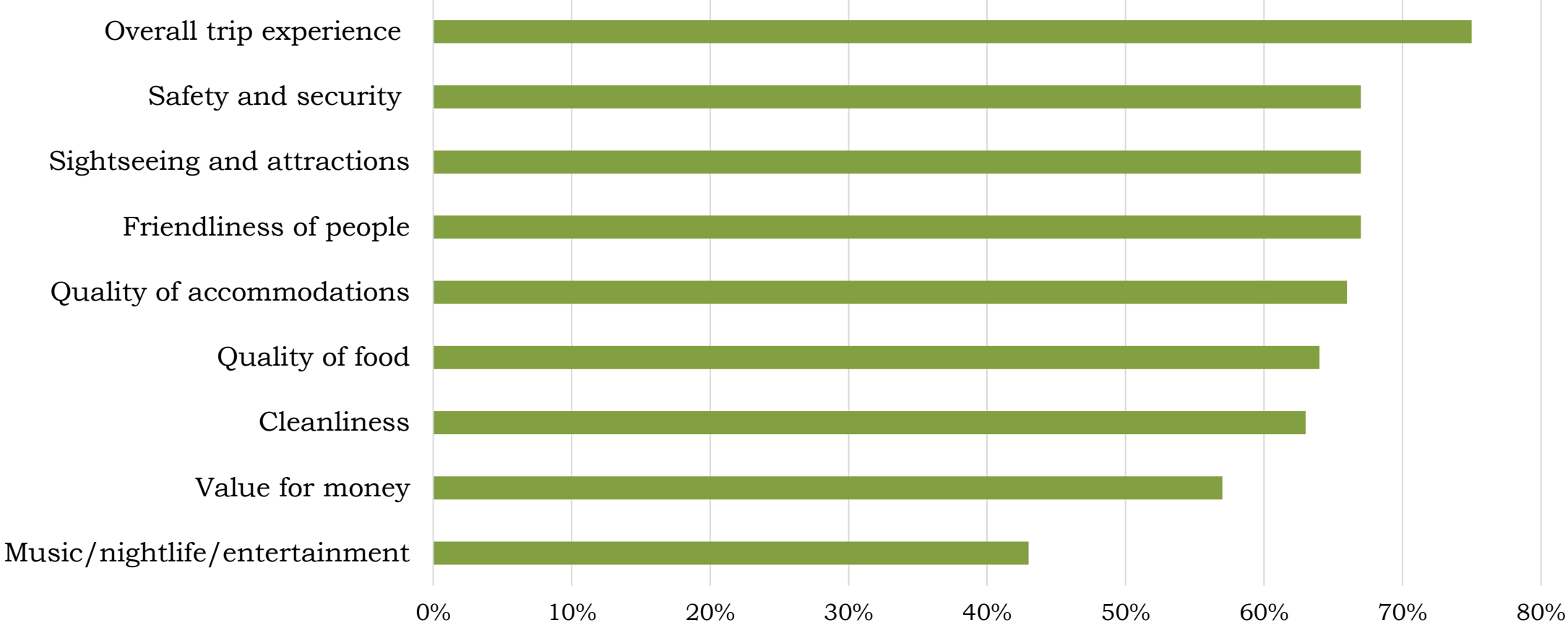


Source: Longwoods International, 2018



# Satisfaction with Trip - % Very Satisfied

Northern Region



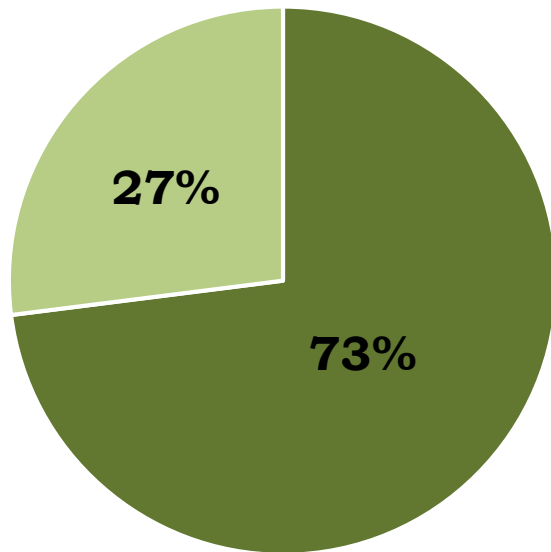
Source: Longwoods International, 2018



# Past Visitation

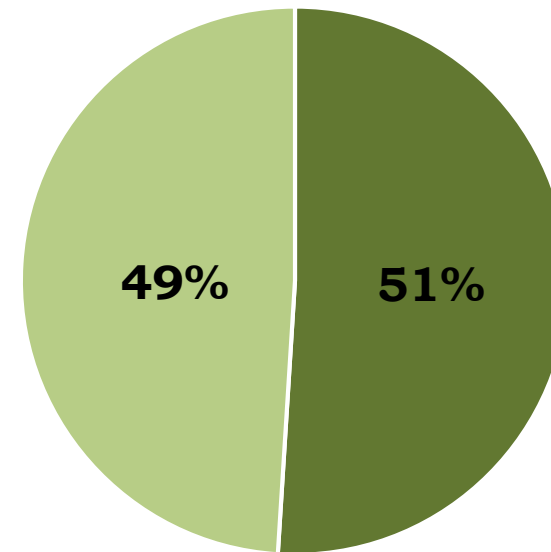
Northern Region

Have you ever visited the Northern Region before?



■ Yes ■ No

Have you visited the Northern Region in the past 12 months?

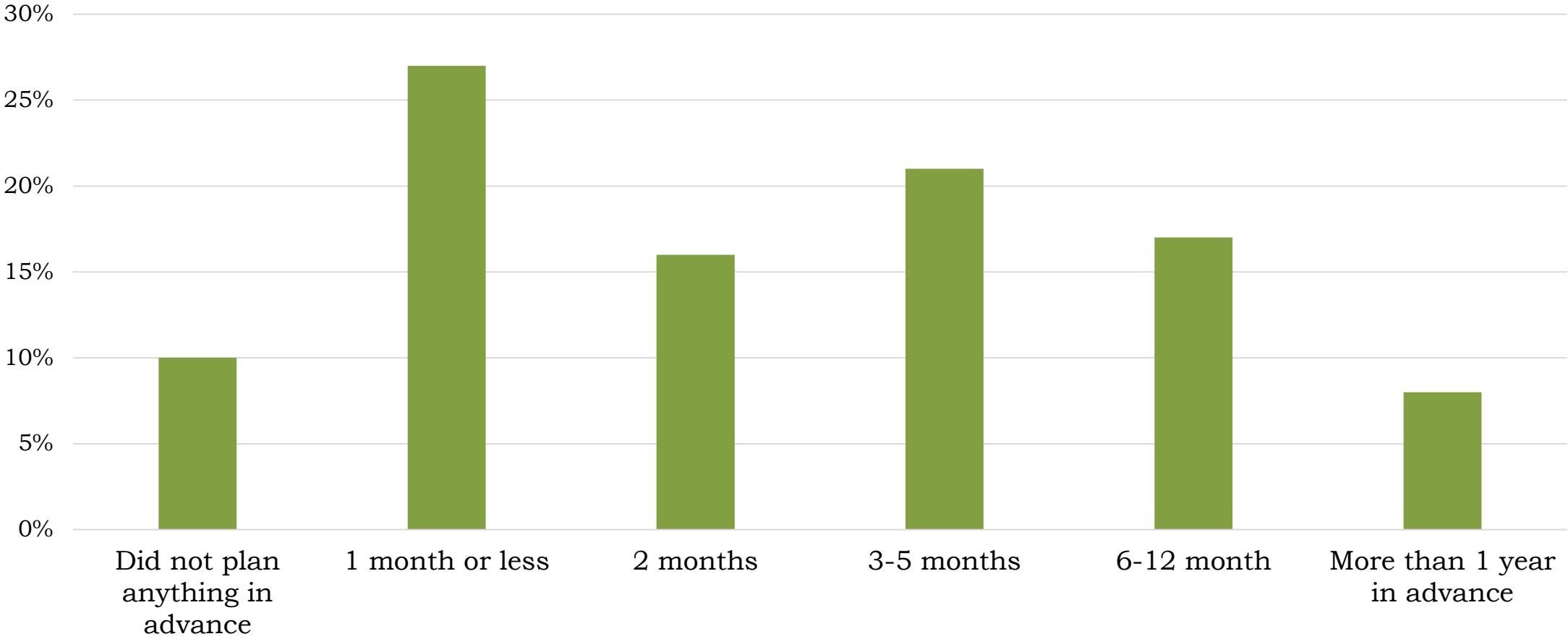


■ Yes ■ No



# Length of Trip Planning

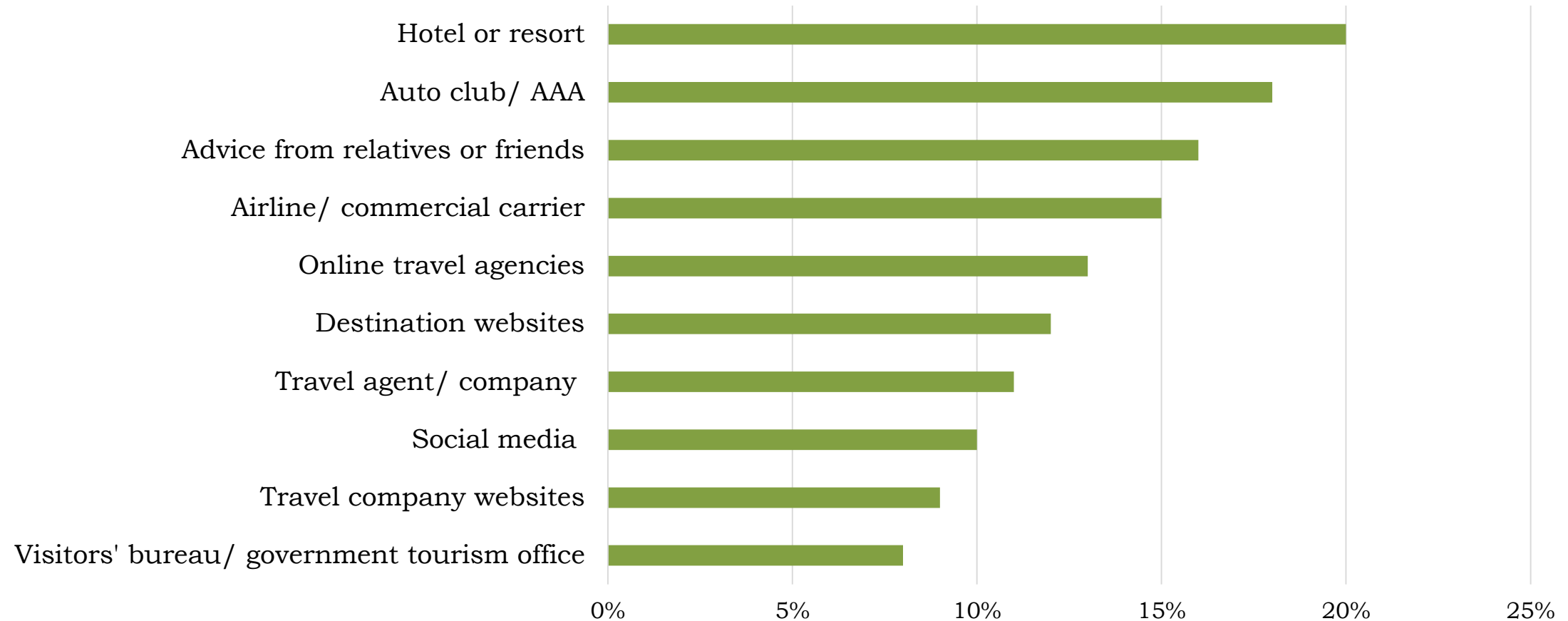
Northern Region



Source: Longwoods International, 2018

# Trip Planning Information Sources

Northern Region

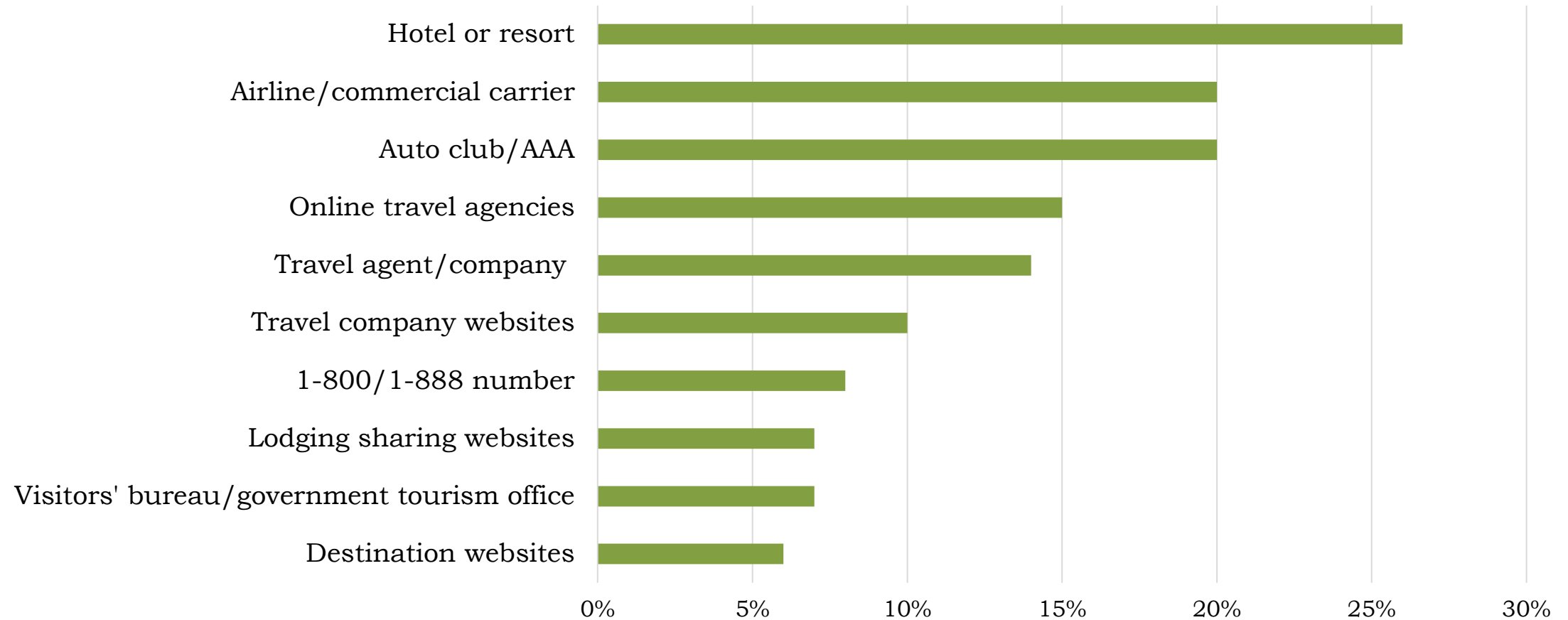






# Method of Booking

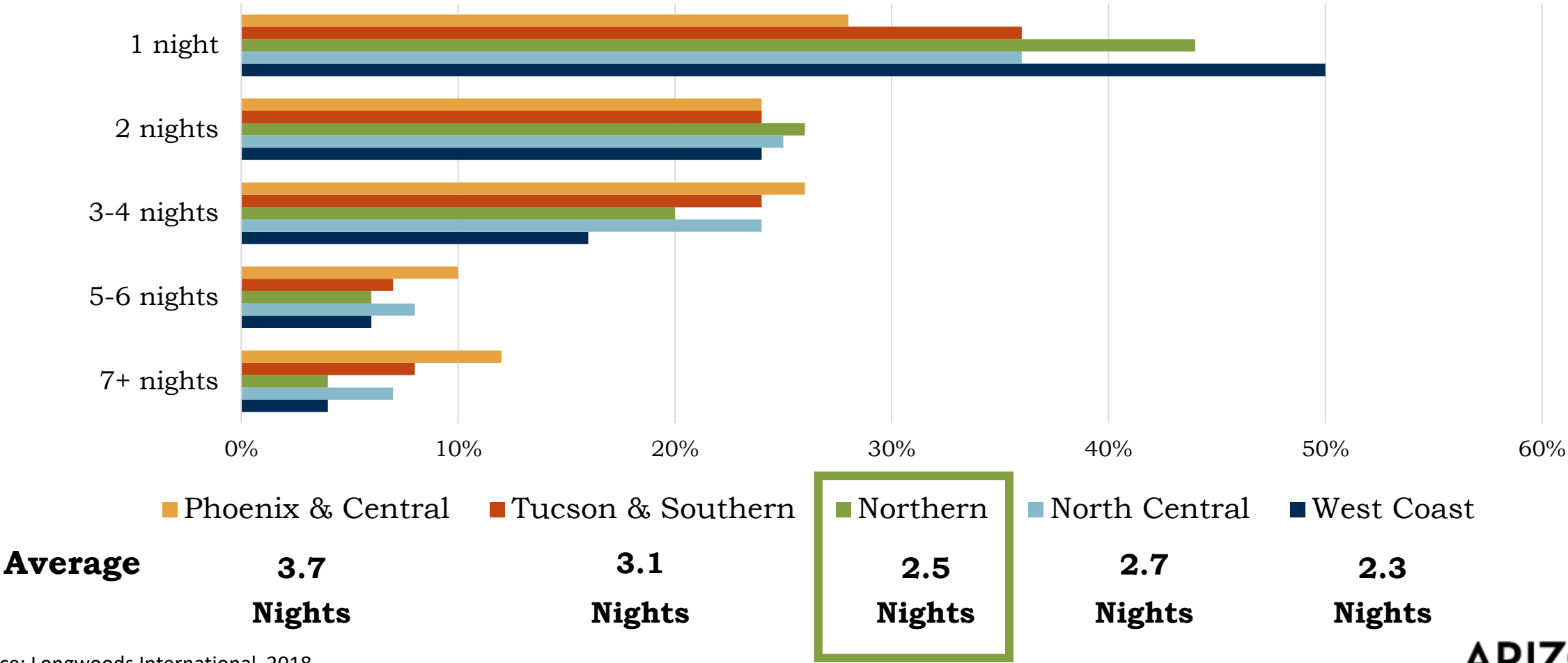
Northern Region





# Number of Nights Spent in Each Region

Northern Region

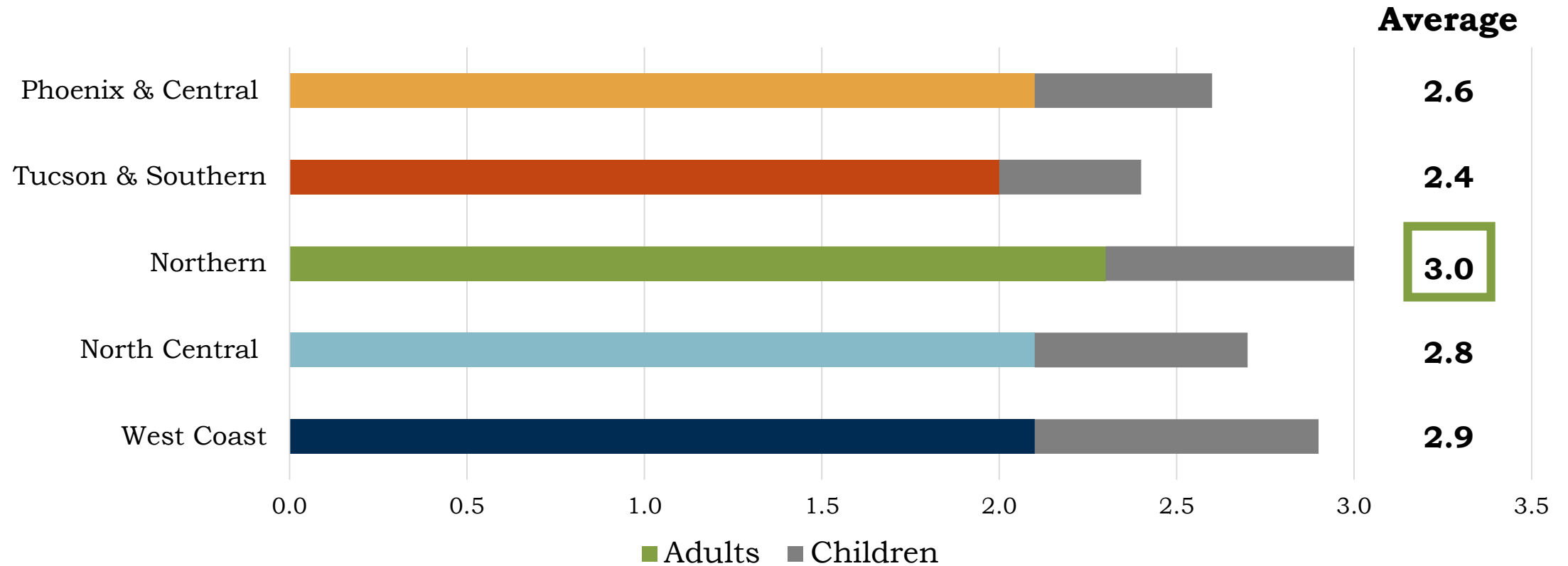


Source: Longwoods International, 2018



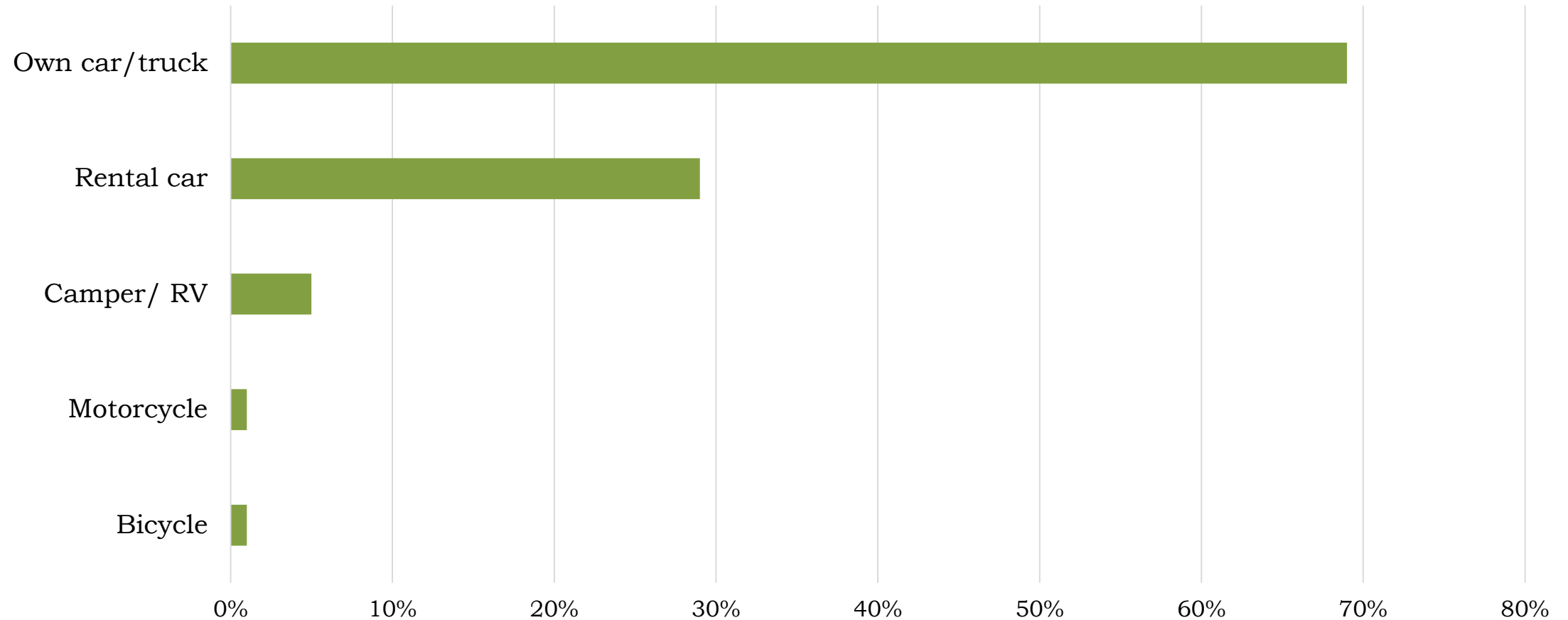
# Size of Travel Party

Northern Region



# Transportation – Private Vehicles

Northern Region

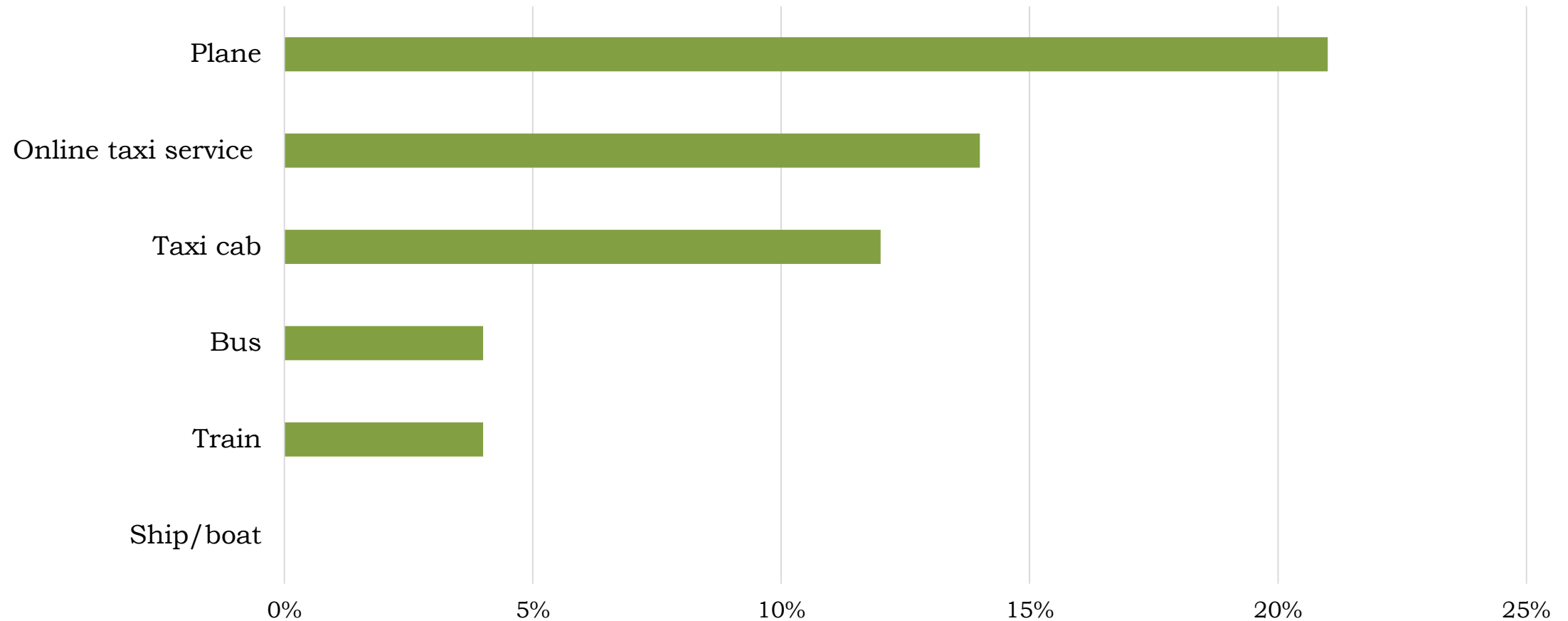


Source: Longwoods International, 2018



# Transportation – Commercial Vehicles

Northern Region

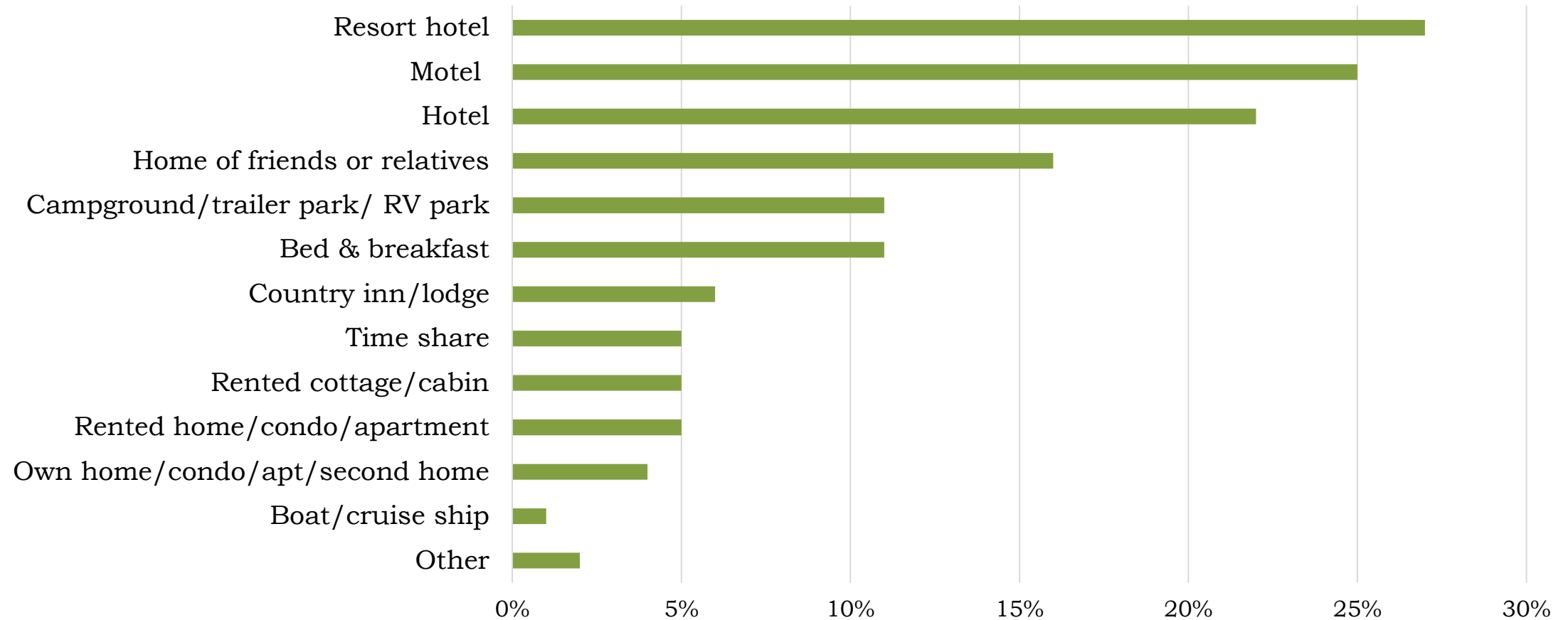


Source: Longwoods International, 2018



# Accommodation

Northern Region

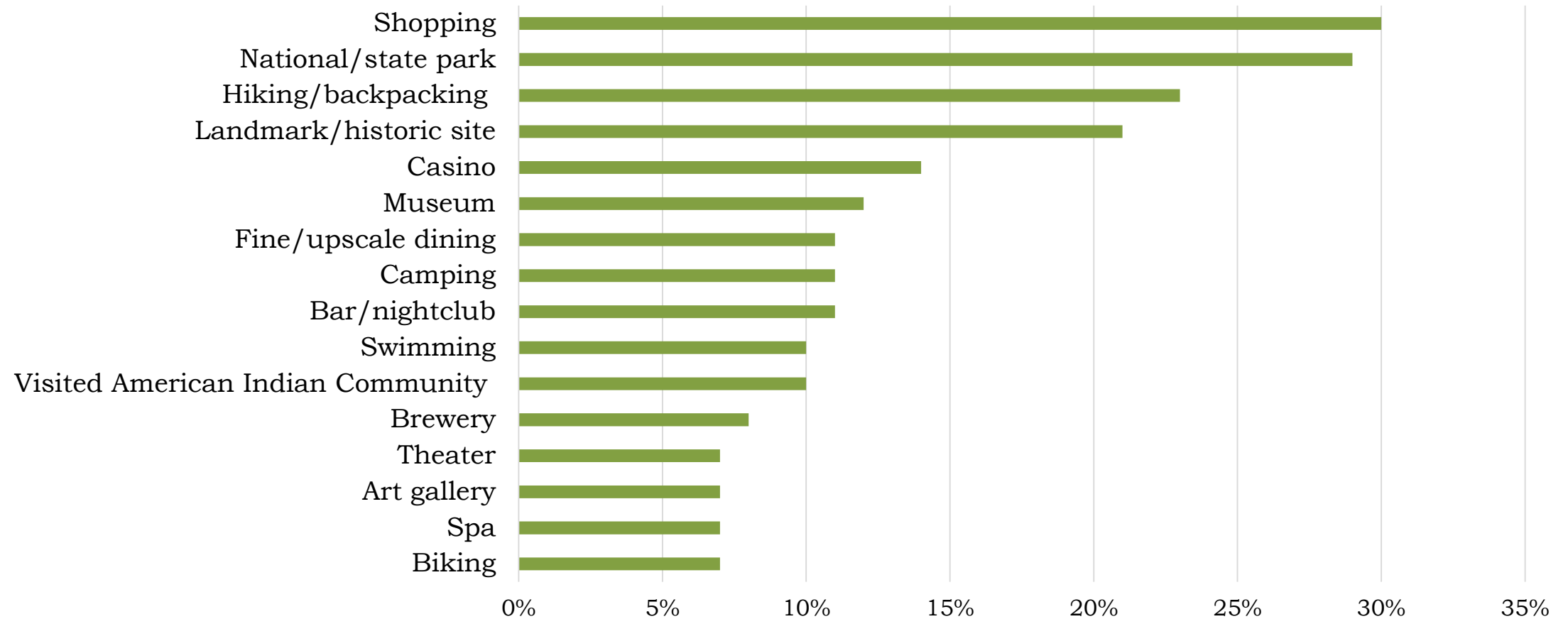


Source: Longwoods International, 2018



# Activities and Experiences

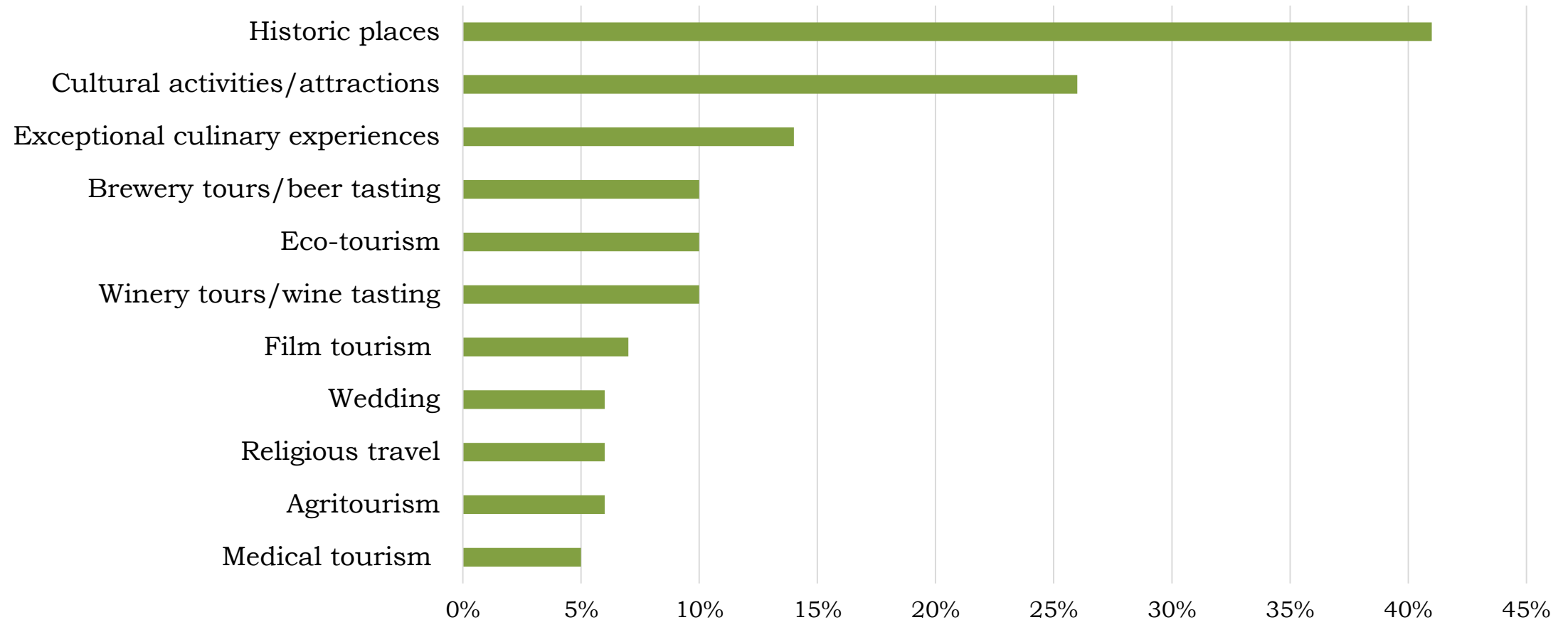
Northern Region





# Activities of Special Interest

Northern Region



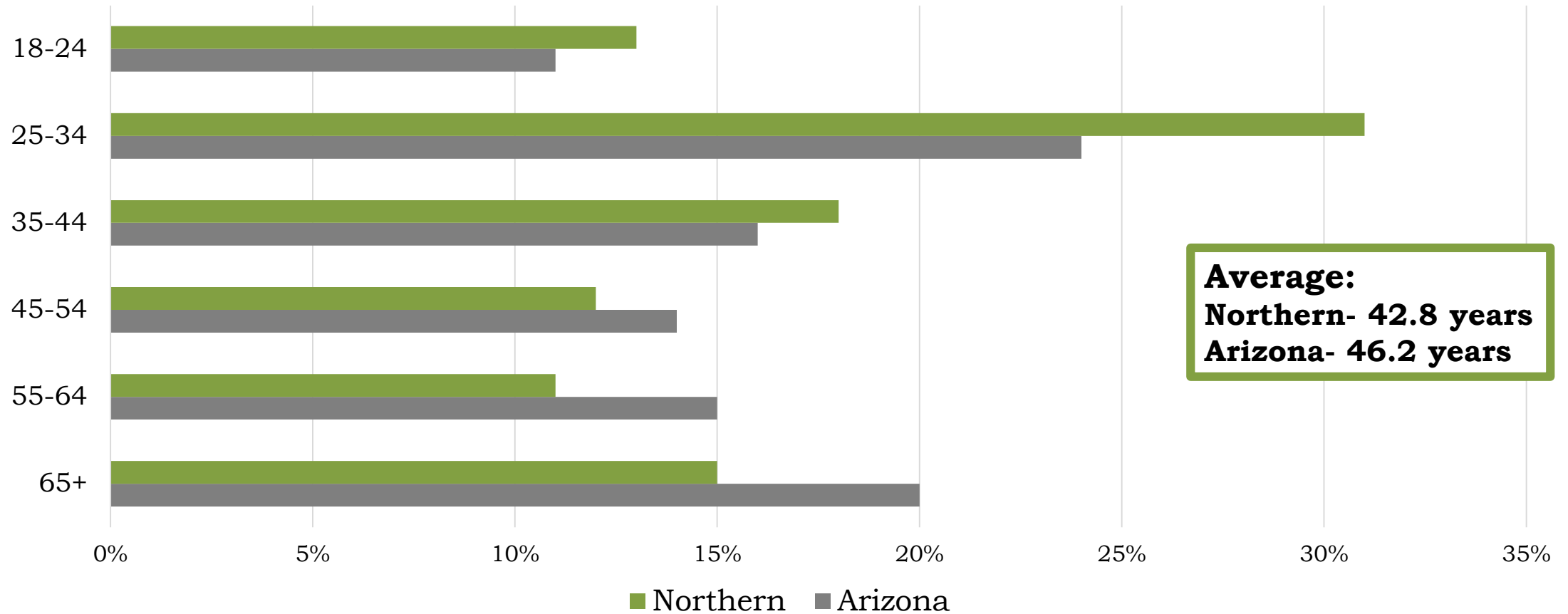
Source: Longwoods International, 2018





# Age

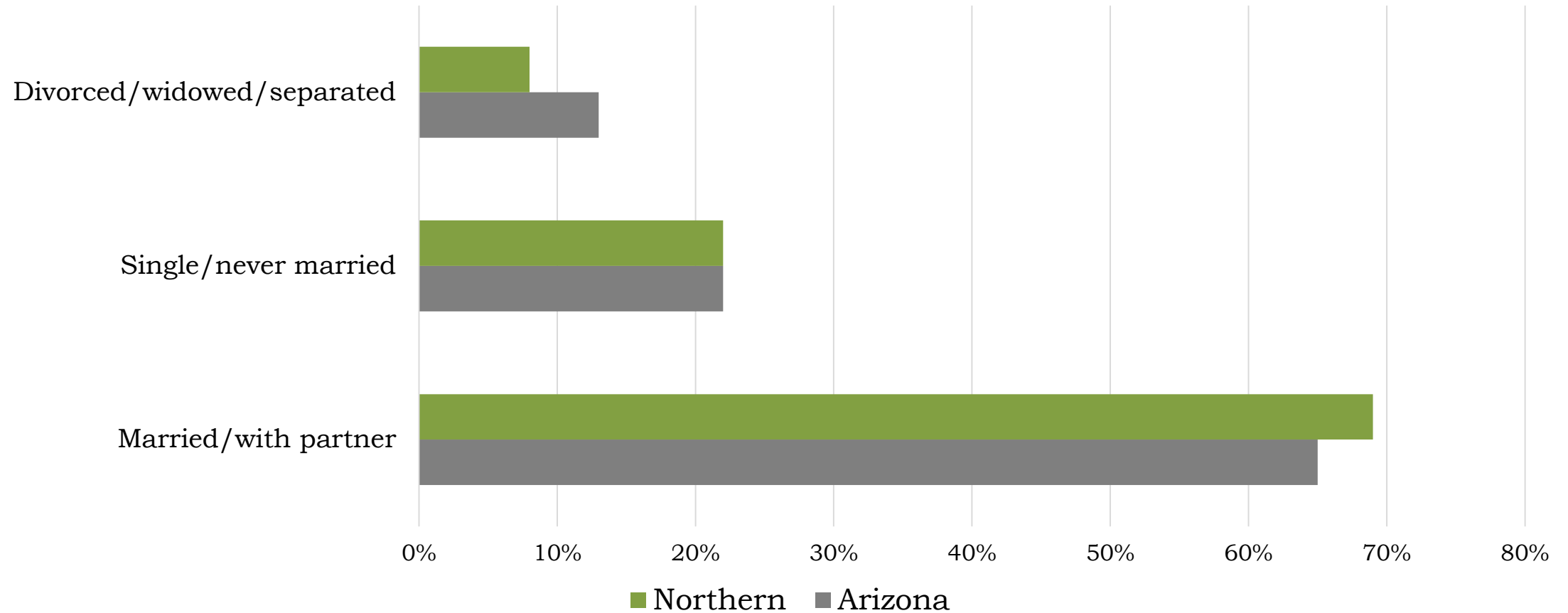
## Northern Region





# Marital Status

Northern Region

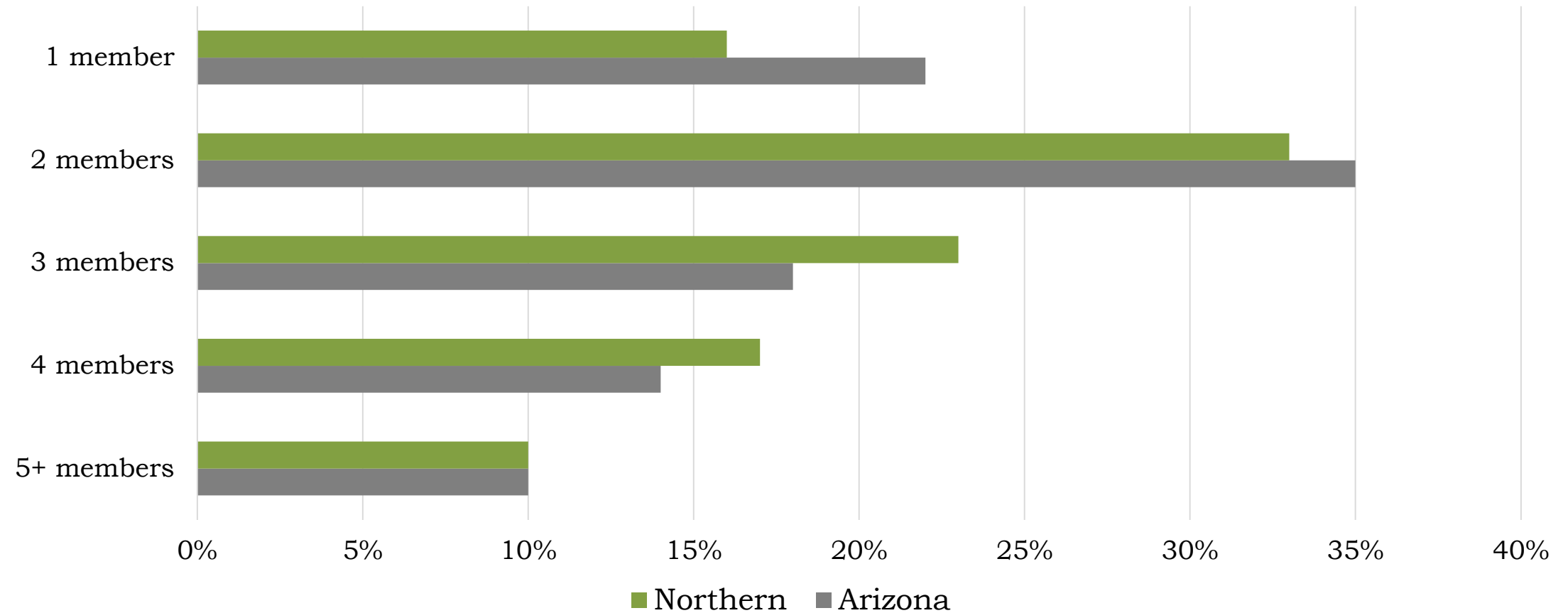


Source: Longwoods International, 2018



# Household Size

Northern Region

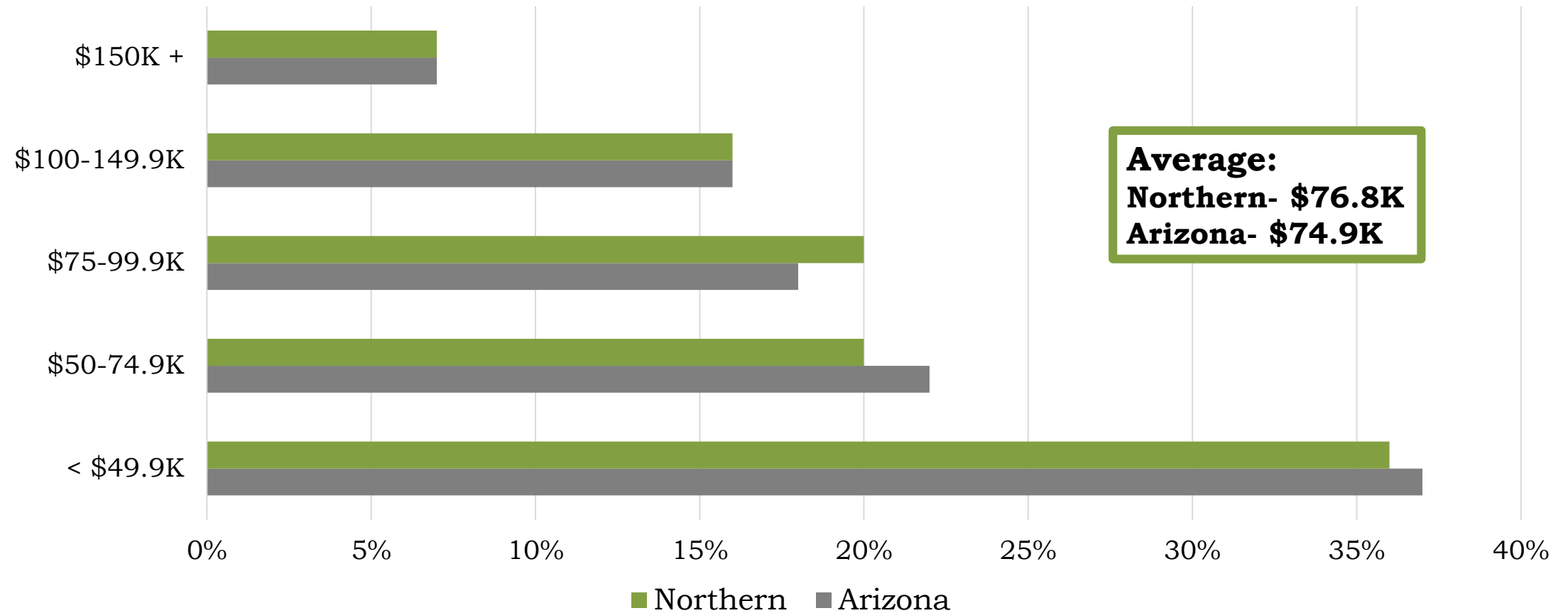


Source: Longwoods International, 2018



# Household Income

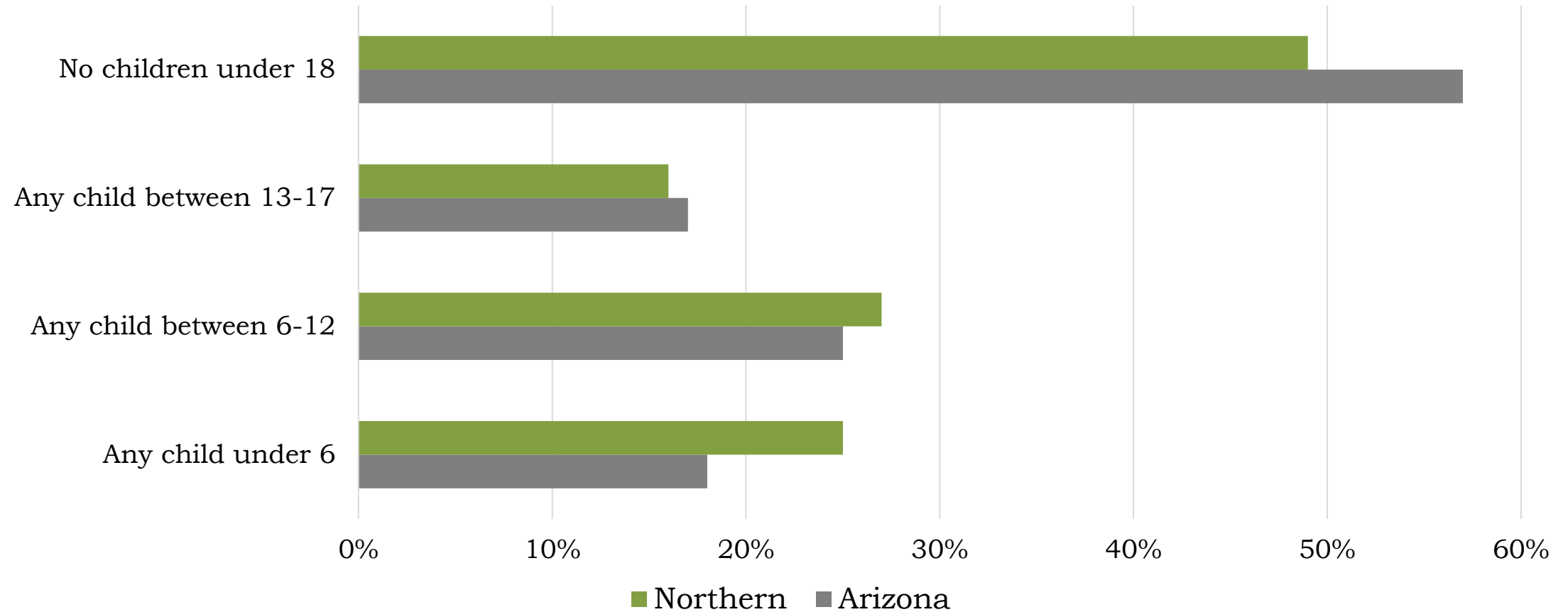
Northern Region





# Children in Household

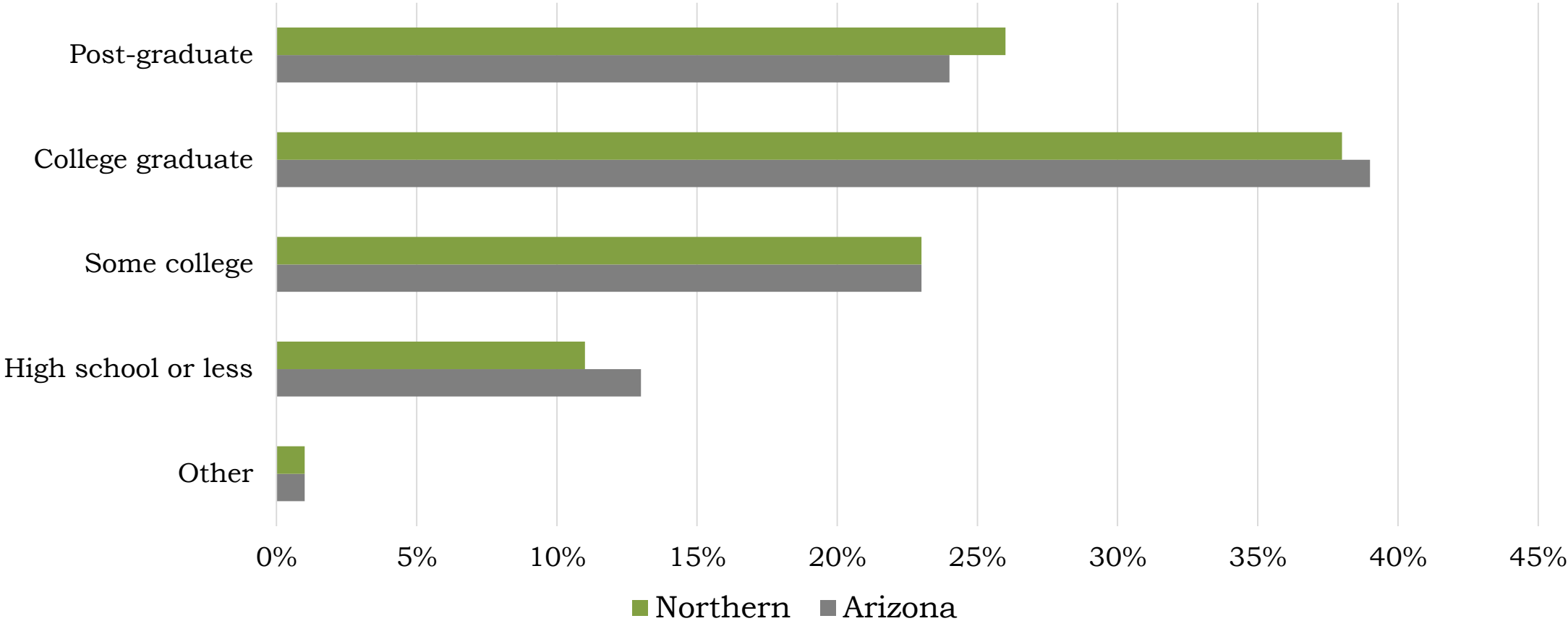
Northern Region





# Education

Northern Region

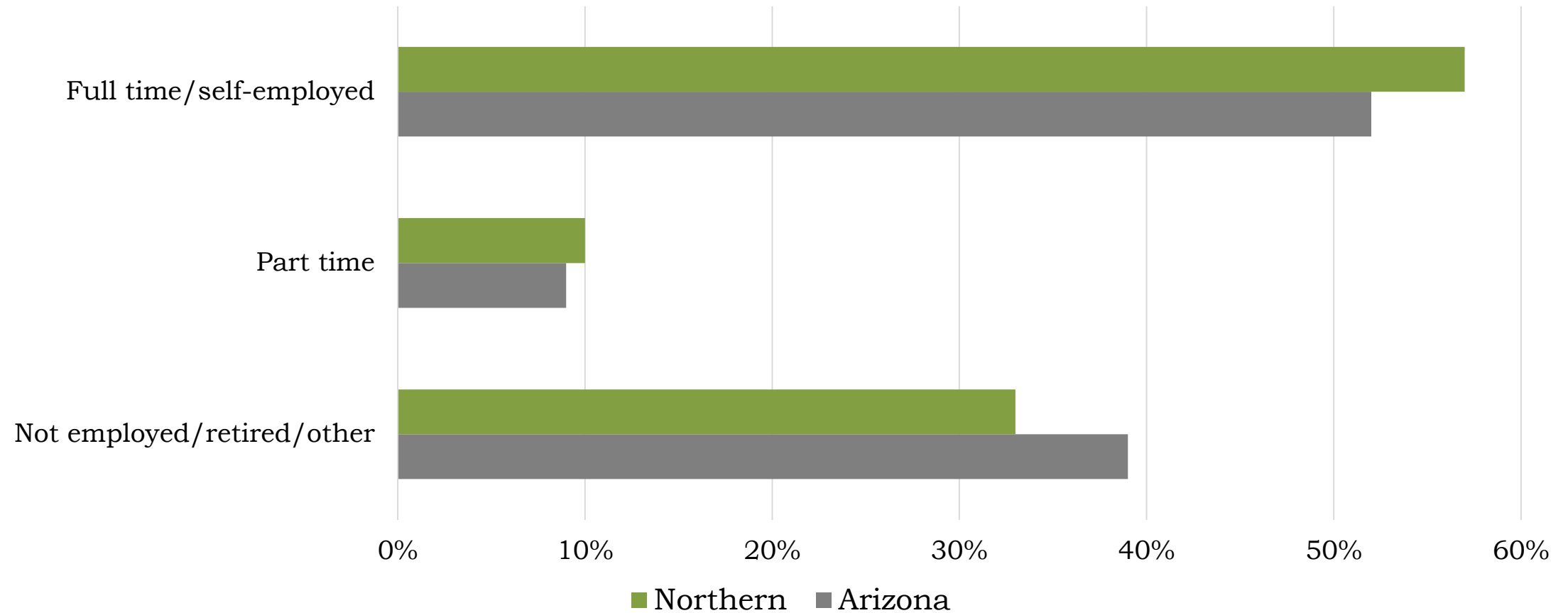


Source: Longwoods International, 2018



# Employment

## Northern Region



# Stay Connected



Presentation slides available at:

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

Colleen Floyd  
Director of Research  
[cfloyd@tourism.az.gov](mailto:cfloyd@tourism.az.gov)  
602-364-3716

Kari Roberg  
Senior Research Manager  
[kroberg@tourism.az.gov](mailto:kroberg@tourism.az.gov)  
602-364-4158

Lena Allen  
Marketing & Research Manager  
[lallen@tourism.az.gov](mailto:lallen@tourism.az.gov)  
602-364-3718