



North Central Region Research Update

April 30, 2014



Update on AOT's Research & Strategic Planning Division

- What We Do
 - Team Introduction
 - Research Sources
 - Infographic Review
 - Update on the North Central Region
 - Upcoming Research
- How To
 - AZOT.gov Research and Statistics Section
 - General Overview
 - Arizona Travel Impacts Tool

What We Do

What We Do

Team Introduction

Karen Churchard, *Assistant Deputy Director*

Melissa Elkins, *Research Manager*

Jennifer Miller, *Research Specialist*

What We Do

Research Division Program of Work

- Visitor Identity
 - Economic Impact
 - Visitor Volume
 - Visitor Profiles
- Market Research
 - Consumer Awareness and Behavior
- Program Effectiveness
 - Advertising, FAMs, Stakeholders

What We Do

AOT Research Sources

Condensed Resources List

Brand USA

Dean Runyan

DIIO

Gallup poll

IATA

Longwoods

MMGY Global

PhocusWright

REDmarke Research

Skift

Smith Travel Research

The Conference Board of Canada

Tourism Economics

US Dept of Commerce

VisaVUE

402

report pages from
PhocusWright & Skift*

15

monthly
incoming
reports

* as of April 2014

What We Do

Infographic Review

Travel and Tourism Works for Arizona

- Economic Impact
- Travel Taxes Impact
- Visitor Spending
- GDP Leaders
- Visitor Profile



What We Do Infographic Review

Travel and Tourism Works in Gila and Yavapai

- Economic Impact
- Lodging Indicators
- State and National Parks
Visitation Highlights



What We Do

Economic Impact Review

Top Segments Tracked:

- Spending
- Employment Earnings
- Jobs
- Taxes (Local & State)

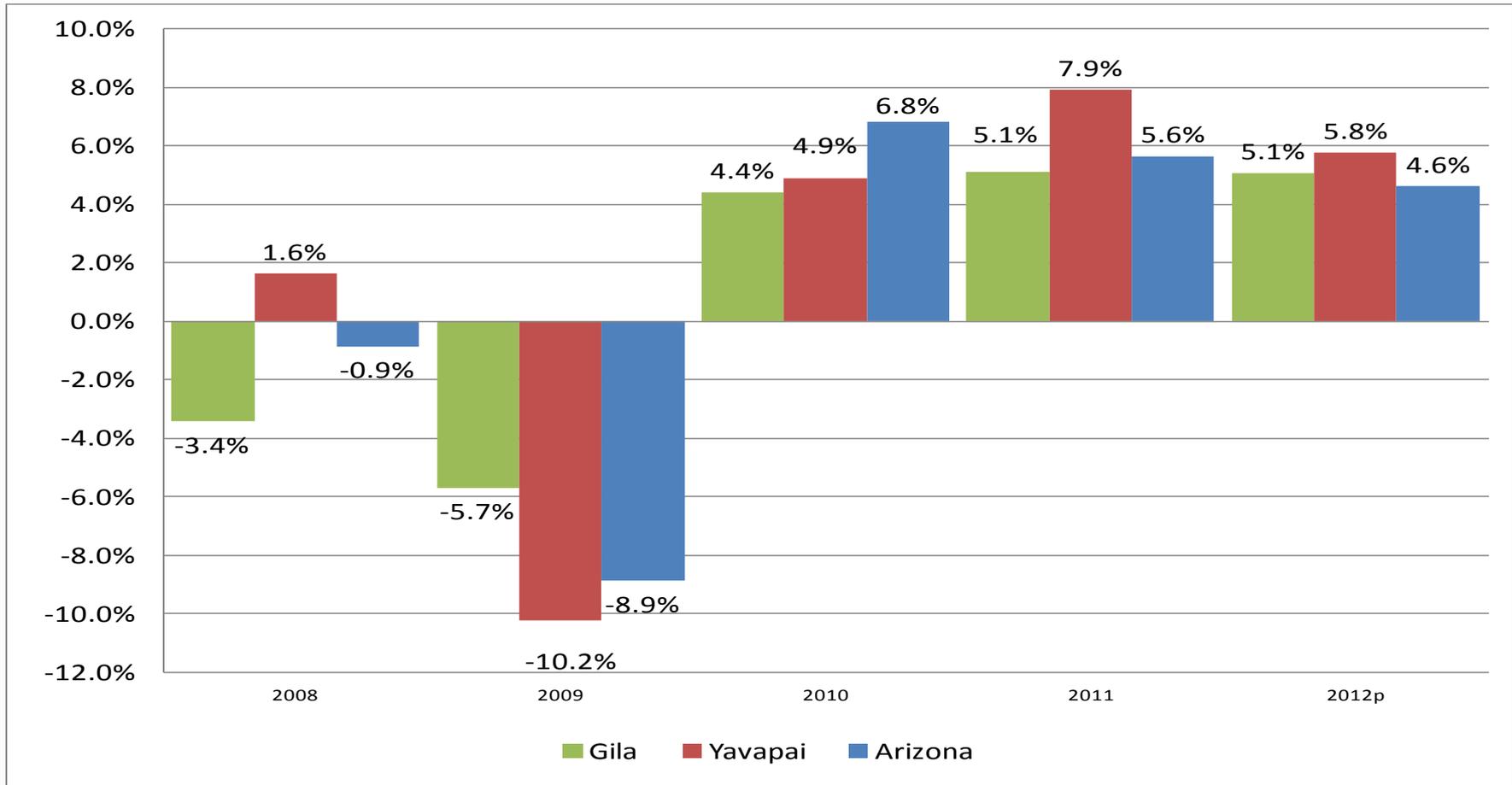
Spending Categories:

- Accommodations
- Food Services
- Food Stores
- Local Transportation & Gas
- Arts, Entertainment & Recreation
- Visitor Air Transportation

What We Do

Update on the North Central Region

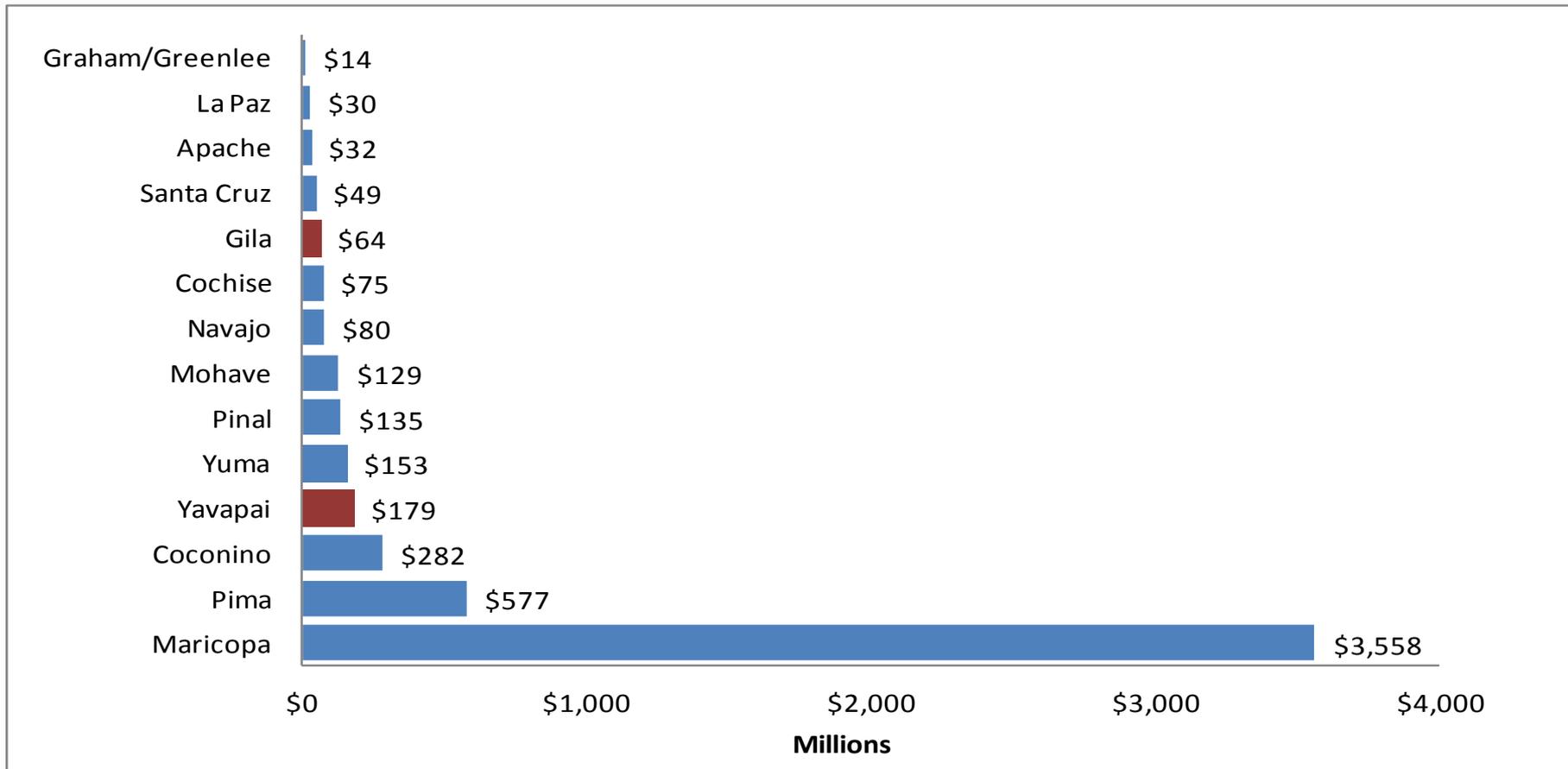
NORTH CENTRAL REGION DIRECT TRAVEL SPENDING - % CHANGE



What We Do

Update on the North Central Region

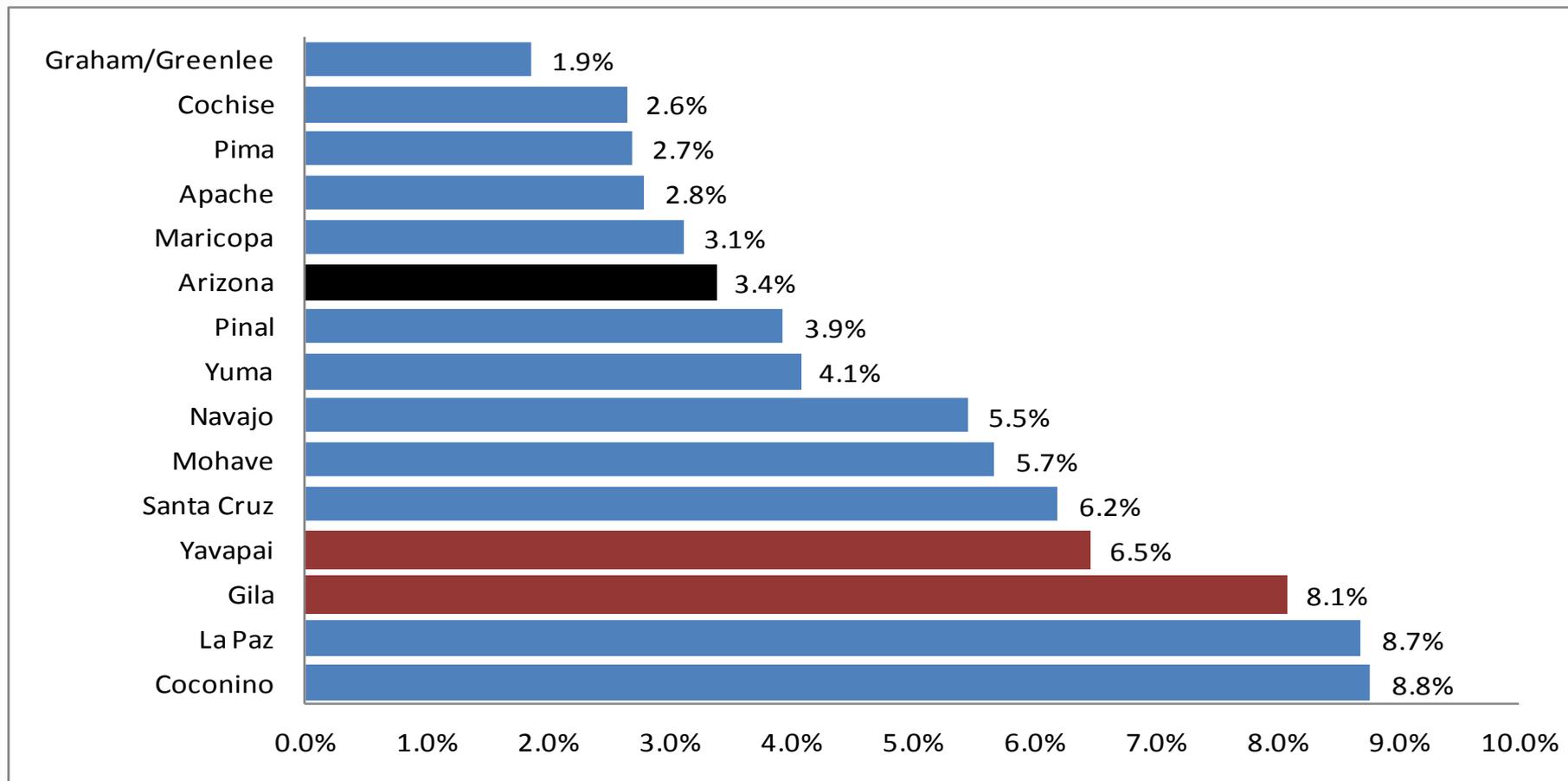
2012 TRAVEL EARNINGS AS PERCENT OF TOTAL EARNINGS IN STATE



What We Do

Update on the North Central Region

2012 TRAVEL EARNINGS AS PERCENT OF TOTAL EARNINGS IN COUNTY



What We Do

Update on the North Central Region

4.5* million Domestic Overnight Visitors in 2012

(13.7% of Arizona's Domestic Overnight Visitors)

Domestic Visitor Characteristics*:

- Average Length of Stay = 4.1 nights
- Average Travel Party Size = 2.9 persons
- Average Household Income = \$74,490
- Average Age = 48 years
- 74% stayed in Paid Accommodations
- \$769 Average Trip Expenditures excluding Air

**2012 Domestic Visitation was based on the following counties: Yavapai, Gila, Graham and Greenlee. In 2013, the North Central region will be made up of Yavapai and Gila counties.*

Source: Tourism Economics and Longwoods International

What We Do

Update on the North Central Region

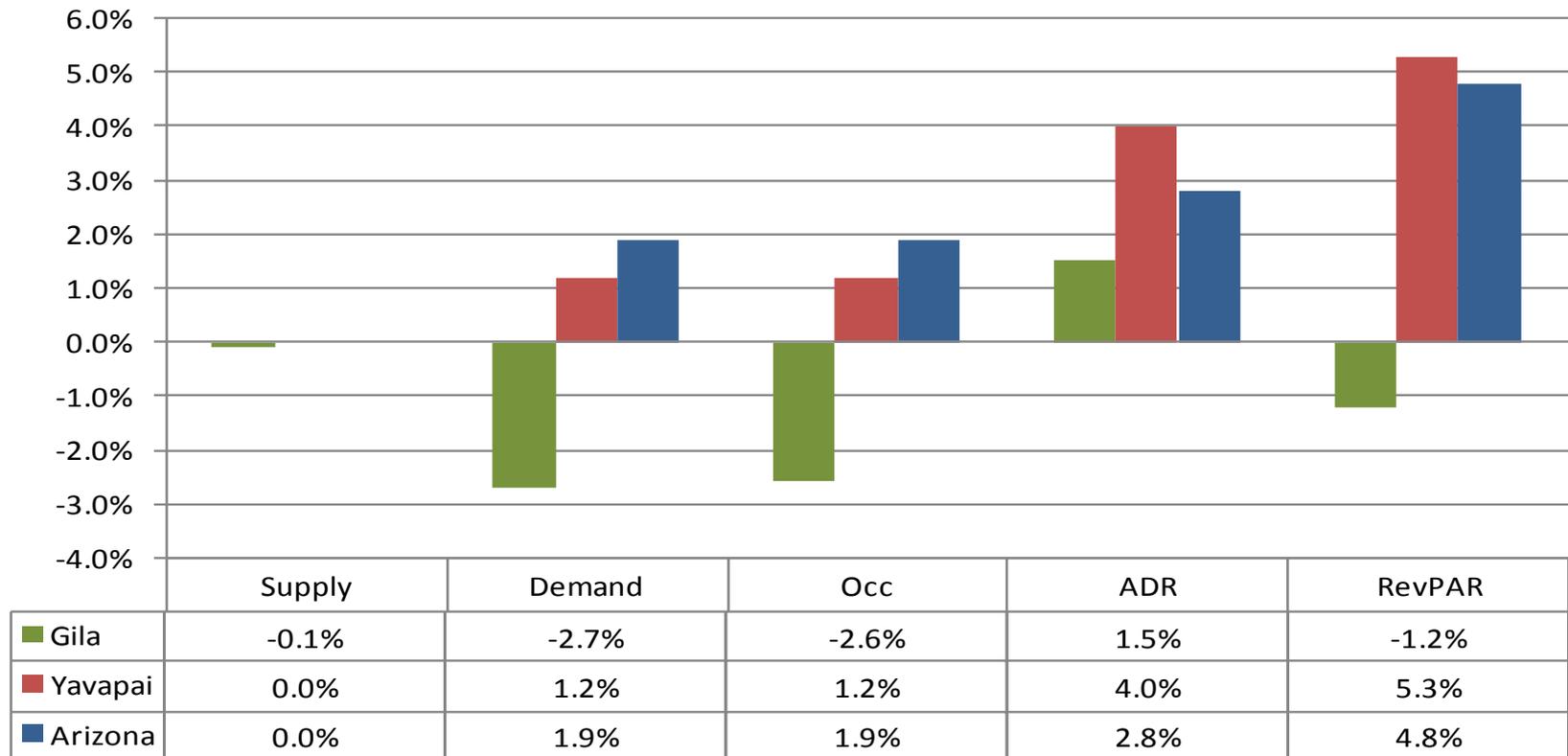
Lodging Definitions:

<u>Indicator</u>	<u>Definition</u>
Supply (Rooms Available)	Supply Number of available rooms/period
Demand (Rooms Sold)	Number of rooms sold/period
ADR (Average Daily Rate)	Daily Price of an occupied room
Occ (Occupancy Percent)	$\text{Demand} \div \text{Supply}$
RevPAR (Revenue per Available Room)	$\text{Occupancy} \times \text{ADR}$

What We Do

Update on the North Central Region

Lodging Indicators Year Over Year Percent Change, 2013



What We Do

Update on the North Central Region

Arizona National Park Visitation Top 10

National Park	2013 Year-end	% Chg 2013 vs 2012
Grand Canyon NP	4,544,301	2.8%
Lake Mead NRA	1,876,034	19.2%
Glen Canyon NRA	1,727,763	2.2%
Canyon de Chelly NM	828,478	0.0%
Saguaro NP	675,638	6.5%
Petrified Forest NP	644,649	-3.0%
Montezuma Castle NM	389,091	-14.5%
Wupatki NM	190,878	-5.2%
Sunset Crater Volcano NM	184,864	4.0%
Walnut Canyon NM	125,268	13.1%

514,469

North Central Region's
Three National Monuments
Total Visitors in 2013

4.3%

of total Arizona
National Parks visitation

What We Do

Update on the North Central Region

Arizona State Park Visitation Top 10

State Park	2013 Year-end	% Chg 2013 vs 2012
Lake Havasu SP	362,348	3.8%
Slide Rock SP	247,647	5.7%
Patagonia Lake SP	176,647	-2.9%
Catalina SP	163,823	7.1%
Dead Horse Ranch SP	139,849	0.8%
Kartchner Caverns SP	137,268	-0.3%
Lost Dutchman SP	121,277	19.1%
Buckskin Mountain SP	96,929	8.6%
Tonto Natural Bridge SP	94,015	19.8%
Fool Hollow Lake RA	89,676	-5.4%

356,400

North Central Region's
Five State Parks
Total Visitors in 2013

16%

of total Arizona
State Park visitation

What We Do

New Research Tool - nSight

 | *Humanizing Travel Intelligence*

If you could see who's shopping online
for leisure travel into your destination
right now,
what would you do differently?

What We Do

New Research Tool - nSight

- Each day, nSight aggregates over 80 million searches made by travelers “shopping” for lodging in destinations around the world
- Pulled from over 5,000 Booking Websites (including data from every major OTA)
- Shows consumer demand for Arizona and our Five Regions...*right now.*



30 Billion+  
Global Travel Searches
from over 5,000 websites

*Now you get
the whole picture!* 

nSight | Humanizing Travel Intelligence

What We Do

New Research Tool - nSight



- Largest database of search and travel bookings in the world – leveraging over 30 Billion searches (demand data) and transactions (conversion data) from over 5,000 consumer websites worldwide.
- Proprietary sources of data comes from leading travel wholesalers and aggregators of third-party cookie data in travel.
- Each day, nSight aggregates over 80 million searches by travelers searching for lodging in destinations around the world.

What We Do

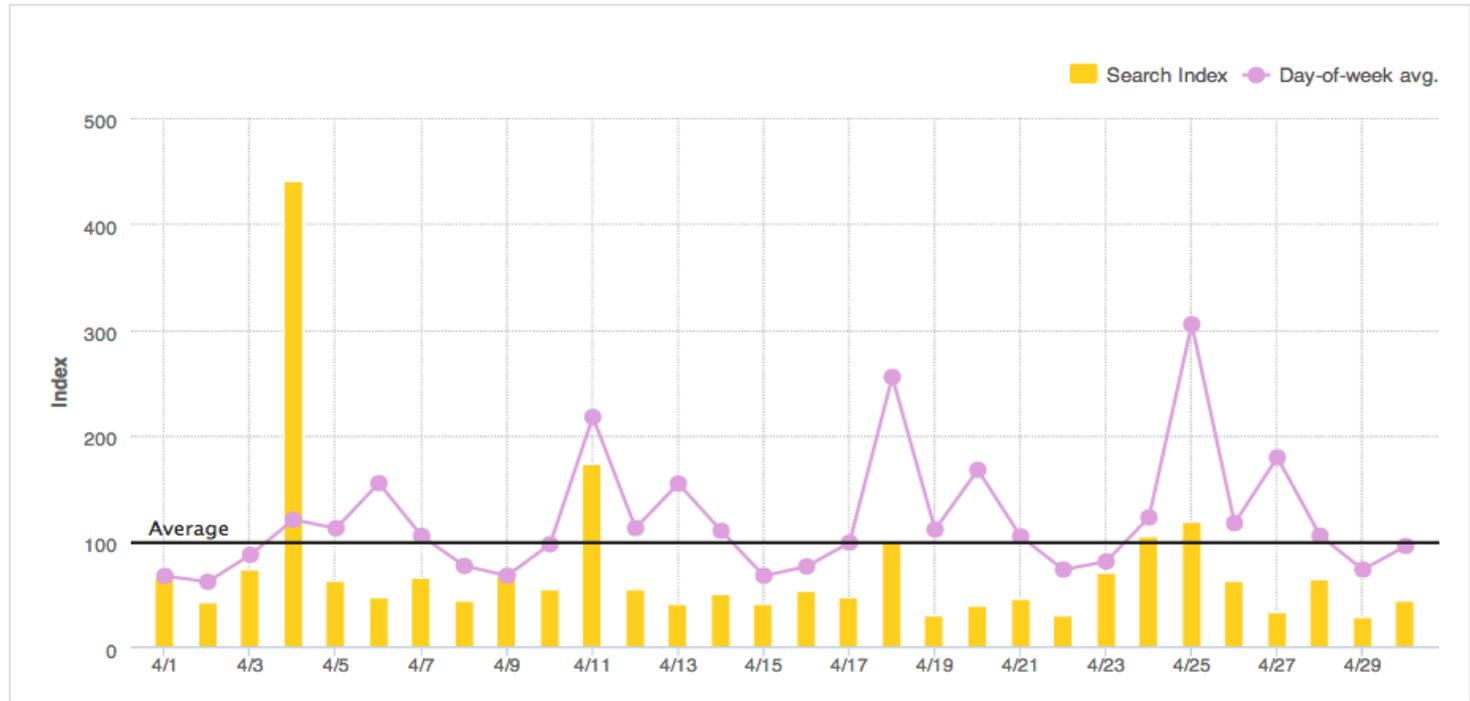
New Research Tool - nSight

DEMOGRAPHIC MIX OF APRIL TRAVEL DEMAND - N. CENTRAL

Breakdown by persona

-  Adventure Seekers
28%
-  Bucket Listers
20%
-  Self Seekers
18%
-  Dream Tripper
11%
-  Go For It Families
8%
-  Frugal Boomers
6%
-  Young Free Spirits
6%
-  Visiting Family
3%
-  Couponing Families
1%
-  Experience Seekers
0%

Demand Overview 4/1/14 - 4/30/14

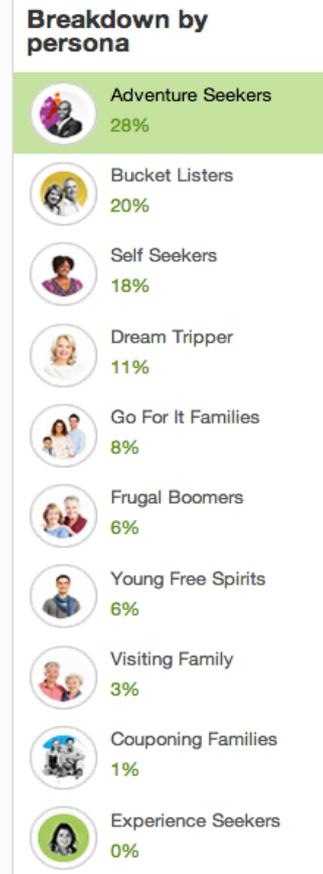


What We Do

New Research Tool - nSight

THE ADVENTURE SEEKER – 28%

- 25-35 years old
- Moving up in their career
- No family or very young family
- HHI @ 100K+
- 6+ trips per year, 2-3 trips around authentic experiences
- Active on social media, spends time and money on interests

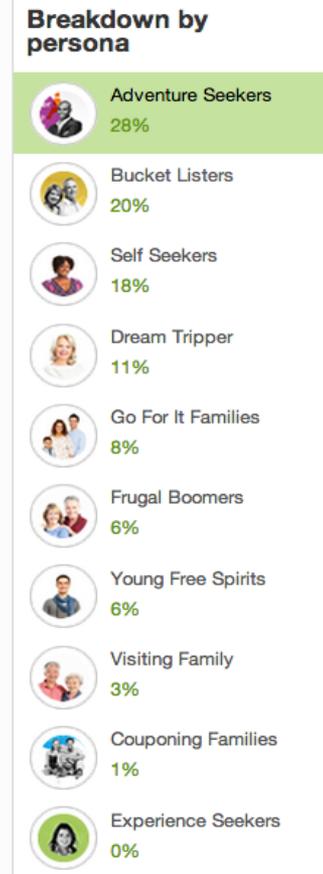


What We Do

New Research Tool - nSight

THE BUCKET LISTERS – 20%

- 66+ years old
- HHI @ \$100K+
- High percentage of income is fixed, tied to investments
- 5+ trips per year with longer stay periods
- longer lead times, lots of research
- 2+ trips per year tied to visiting family
- Engaged in hobbies and interests

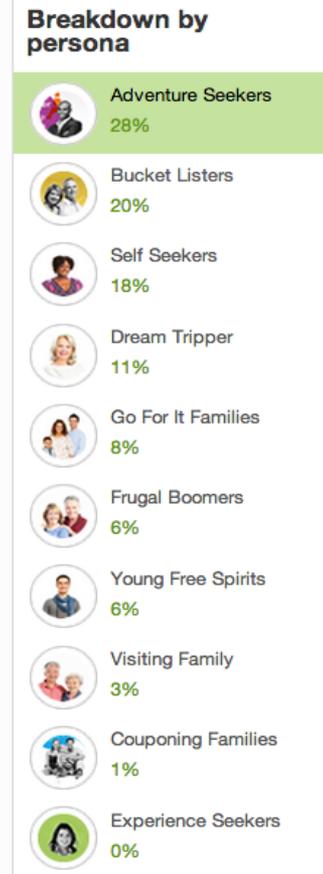


What We Do

New Research Tool - nSight

THE SELF SEEKERS – 18%

- 25-35 years old
- Multiple jobs over several years
- 4+ trips a year
- HHI @ \$75K+
- Very active on social media
- More budget minded traveler – do more with less
- Likely to travel with other friends
- Desired experience: Leisure and culture; inspiration

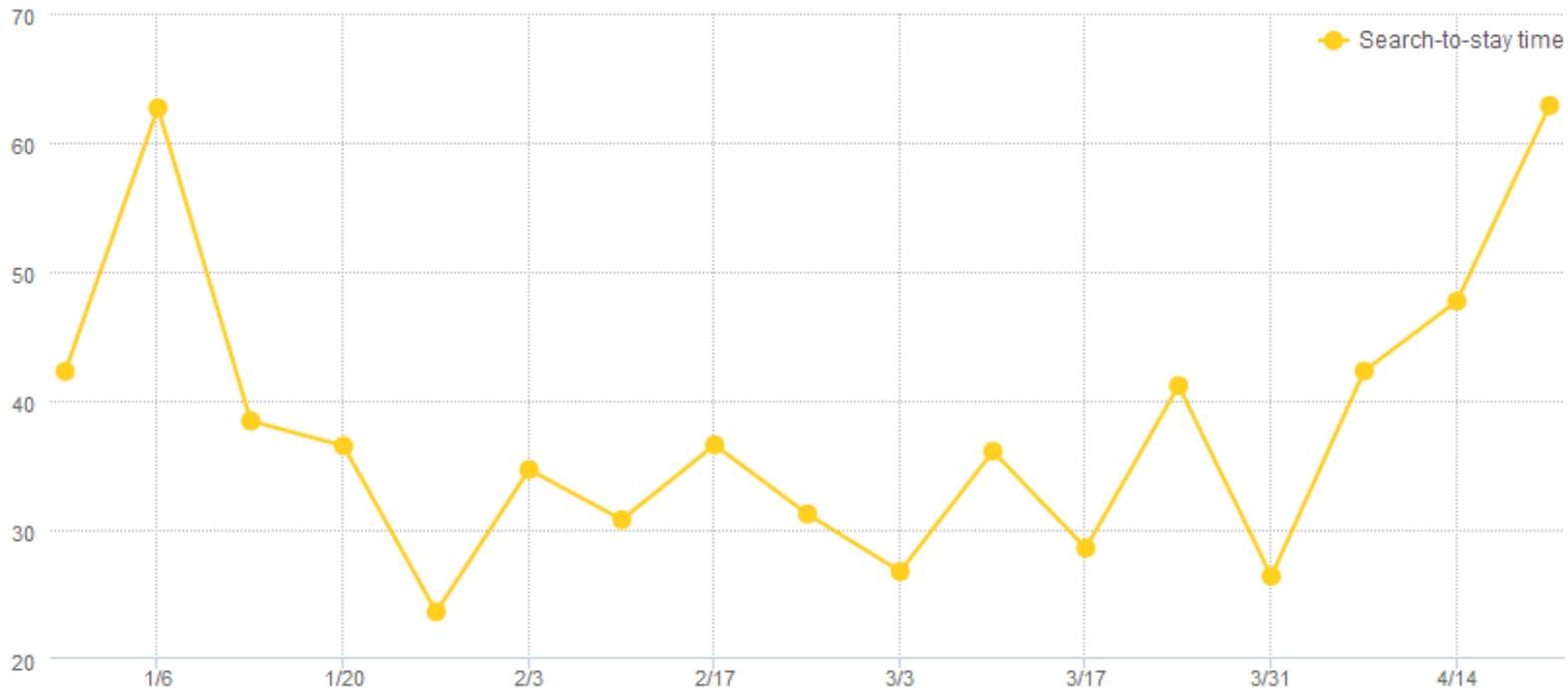


What We Do

New Research Tool - nSight

JAN-APR SEARCH TO STAY BY TRAVEL DATE FOR N. CENTRAL
(AVG # OF DAYS IN ADVANCE TRAVELERS ARE LOOKING)

Search to Stay Trend

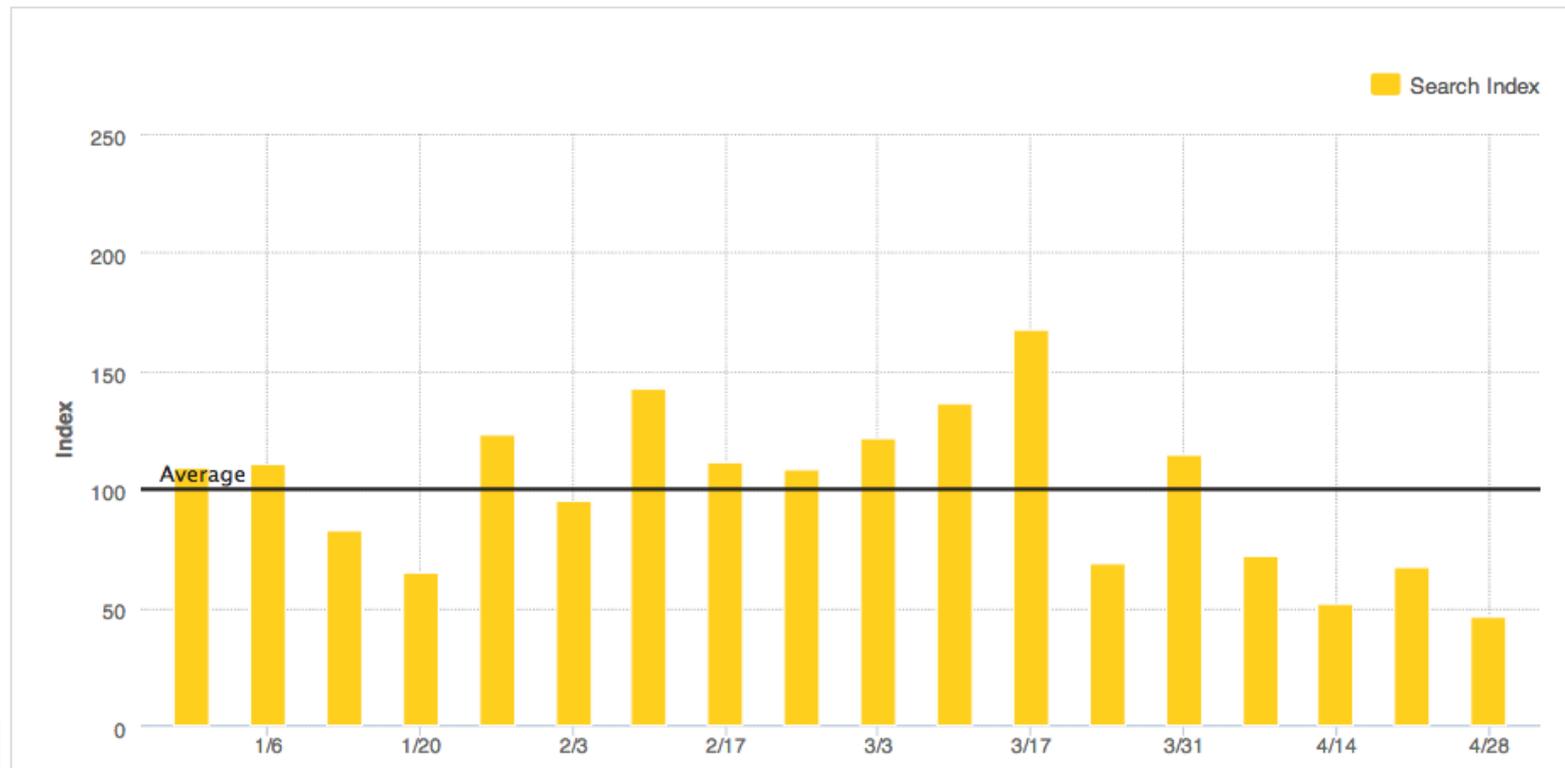


What We Do

New Research Tool - nSight

CONSUMER SEGMENT DEMAND BY WEEK FOR Q1 + APRIL N. CENTRAL
(SOURCE - 3RD PARTY ONLINE BOOKING SITES)

Demand Overview 1/1/14 - 4/30/14



What We Do

New Research Tool - nSight

Top 10 Source Markets for Online Demand for Overnight Visitation January 1 – April 25, 2014

NORTH CENTRAL AZ

1. Phoenix-Mesa AZ
2. New York NY
3. Los Angeles-Riverside-Orange County CA
4. Chicago IL
5. Seattle-Tacoma WA
6. San Jose CA
7. San Diego CA
8. San Francisco CA
9. Boston MA
10. Minneapolis-St. Paul MN-WI

ARIZONA (Statewide)

1. New York NY
2. Phoenix-Mesa AZ
3. Los Angeles-Riverside-Orange County CA
4. Chicago IL
5. Seattle-Tacoma WA
6. Dallas-Fort Worth TX
7. Minneapolis-St. Paul MN-WI
8. Denver CO
9. Philadelphia PA
10. Detroit MI

What We Do

Upcoming Research 2014

- Target City Analysis: Spring
- Improved International Research (new): Spring/Summer
- 2013 YE AZ Travel Impact Study: GCOT/Summer
 - Impact by Legislative District (new)
 - Online Tool Compatible for Mobile Devices (new)
- 2013 YE AZ Domestic/Intl Visitor Statistics: GCOT/Summer
- Completion of Arizona Tribal Tourism Study: Fall

“Fun” Research Facts

- Target City Analysis compiles data on 20 individual categories for 41 DMAs* resulting in over 2,400 data cells.
 - Focus on 30% of US HH, Five Lifestages with HHI of \$75K+ or \$100K+
- Track Travel Trends using more than 18 paid and free data sources.



*DMA = Destination Market Area

Source: AOT Research

How To...

AZOT.gov Research & Statistics “How To” 31

General Overview

- Annual Research
- Monthly & Quarterly Research
- Arizona Research Reports and Presentations
- Research Resources
- Interactive Tools

AZOT.gov Research & Statistics "How To" Research Page 32

AOT EXECUTIVE OFFICE

BI-NATIONAL & FEDERAL PROJECTS

COMMUNITY RESOURCES

RESEARCH AND STATISTICS

Annual

Monthly and Quarterly

Arizona Research Reports and Presentations

Research Resources

Interactive Tools

INDUSTRY EVENTS AND CALENDAR

MARICOPA COUNTY PROPOSITION 302

MARKETING PROGRAMS

PROCUREMENT

COMMUNICATIONS

CONTACT US

Research and Statistics

The Research and Strategic Planning Division at the Arizona Office of Tourism compiles data throughout the year, monitoring tourism indicators across the state and providing constituents with the most comprehensive, up-to-date statistics.

Our most recent report, the Statewide Tourism Indicators Infographic (to the right), is a year to date snapshot of the information reported on a monthly basis. The graphic can be downloaded by clicking [here](#).



To access our travel research resources, please see below.

[Annual Research](#)
Includes Economic Impact of the Travel Industry along with data on Domestic and International Visitors.

[Monthly & Quarterly Research](#)
Includes Lodging Performance, National Park Visitation, State Park Visitation, Airport Passenger Traffic, Gross Sales and Tourism Taxes, and Arizona Welcome Center Visitation.

[Arizona Research Reports and Presentations](#)
Includes Community Studies and Assessments, Events and Attractions reports, and Niche Tourism Studies.

[Research Resources](#)
Includes links to National, State, and Local Resources to assist in Tourism Research.

[Interactive Tools](#)
Includes the Arizona Air Traffic Analysis and Arizona Travel Impacts tools.



Most Popular Links:

[2013 Research Roundup: Arizona Tourism in 2012 and Beyond](#)

[1998-2012 Arizona Travel Impacts](#)

[Media Kit: 2012 Arizona Official State Visitor's Guide and Map](#)

AOT in Action

Sign up for our weekly email newsletter featuring the latest reports, trends and statistics related to tourism in Arizona.

First name

Last name

Email Address

Arizona Travel Impacts Tool

- Using the map, click the county (or the entire state) to review statistics

ARIZONA Travel Data

Grand Canyon N.P. NPS

You now have direct access to travel impact data, as reported in the County Travel Impacts reports, prepared annually by Dean Runyan Associates, Inc. for the Arizona Office of Tourism. The Travel Impacts Report includes direct economic impacts of travel to and through Arizona and each of its 15 counties in the categories listed below:

Direct Travel Spending	Direct Earnings
Direct Employment	Direct Tax Receipts

<<< Click a County or State on the map to ACCESS DATA

Dean Runyan Associates

This web application was prepared for the Arizona Office of Tourism.
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ARIZONA
GRAND CANYON STATE

AZOT.gov Research & Statistics "How To" 34

Arizona Travel Impacts Tool

- Select a category of statistics to review

ARIZONA Travel Data

You selected: Yavapai County [Change Selection](#)

View Definition of Terms

- ▼ Total Direct Travel Spending
 - All categories (select year below)
 - CY Totals
 - Visitor Spending at Destination
 - Other Travel*
- ▼ Visitor Spending
 - CY Totals
 - ▶ by Type of Accommodation
 - ▶ by Commodity Purchased
- ▶ Total Direct Earnings
- ▶ Total Direct Employment
- ▶ Total Direct Tax Receipts

Yavapai County
Please make a selection on the left...

100
80
60
40
20
0

[Save Table as Excel](#) [Save Chart as JPEG](#)

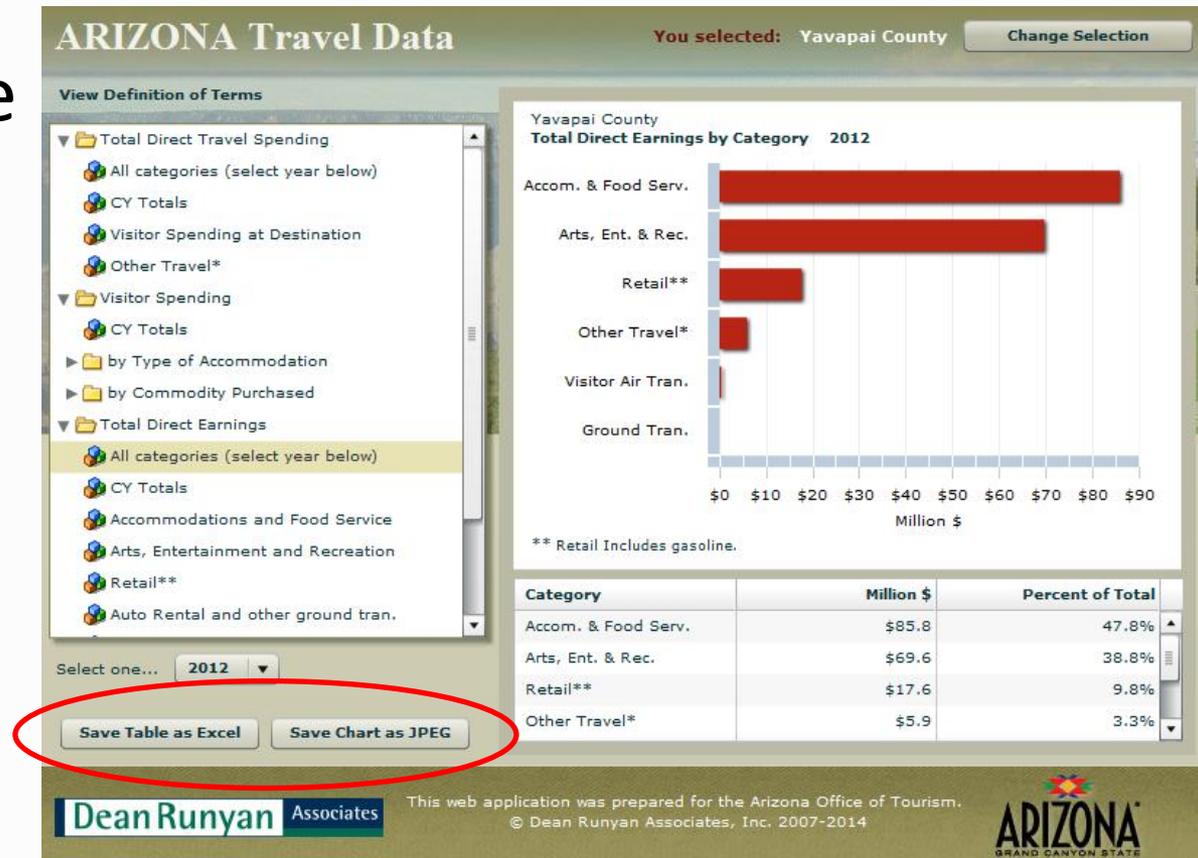
Dean Runyan Associates This web application was prepared for the Arizona Office of Tourism.
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ARIZONA
GRAND CANYON STATE

AZOT.gov Research & Statistics "How To" 35

Arizona Travel Impacts Tool

- Once you have the data you want, select a download option.



What We Do

Team Introduction

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