

## EXECUTIVE SUMMARY

The *Grand Canyon National Park & Northern Arizona Tourism Study* was a year-long survey of visitors to Grand Canyon National Park, conducted at both the South Rim and North Rim sites from September 2003 thru August 2004. The survey captured information about visitors' experiences both in the park and in the region surrounding the park. This Executive Summary provides a brief review of the report's overall findings.

- According to Grand Canyon National Park visitation records, 4,287,296 recreational visitors entered the park during the survey period encompassing September 2003 thru August 2004.
- Grand Canyon National Park is one of the world's premier attractions, with the power to draw visitors from great distances. This survey documented visitors from all 50 U.S. states and Puerto Rico, plus visitors from 41 foreign countries. Overall, 83% were domestic visitors residing in the United States; California (12.2%), Arizona (8.9%), Texas (4.8%), Florida (3.4%) and New York (3.2%) represented the top domestic markets. Seventeen percent of visitors were of foreign origins, and the top foreign markets were: the United Kingdom (3.8%), Canada (3.5%), Japan (2.1%), Germany (1.9%) and The Netherlands (1.2%).
- Overall, travel party size averaged 3.4 persons and most parties were comprised of two adults. Only 30% of travel parties contained children under age 18, and these averaged one child per party. Considering only median values, typical parties reflected two adults (one man/one woman) and no children.
- Grand Canyon visitors averaged 48.5 years of age. Nearly half (47.5%) of survey respondents were between the ages of 46 and 65. Those 26 to 45 years comprised over a third of the sample (35.2%). Visitors over age 65 years (11.5%), and those 25 years or younger (5.8%) completed the age segments.
- GCNP visitors were highly educated. The vast majority of respondents (85.2%) had attended some college. Of these, one-fourth (24.8%) had completed a 4-year degree, while another 34.3% engaged in graduate study or earned graduate degrees.
- First-time visitors (58.6%) accounted for three out of five travelers to Grand Canyon National Park. The remaining 41.4% were repeat visitors to the park.
- The majority of participants in this survey entered the park at the South Rim or Tusayan entrance (69.3%). North Rim surveys reflected 16.7% of visitor arrivals. The Desert View or East entrance on the South Rim accounted for 14.0% of respondents.
- Personal vehicles dominated visitors' transportation modes. Private vehicles (59.7%) combined with Rental vehicles (37.4%) were used by 97.1% of respondents. Allowing for multiple responses, Commercial airlines (16.4%) and RVs (7.8%, private and rental) were also significant travel modes.

- Grand Canyon National Park is a family destination; fully 75.2% of visitors traveled to the park with family members. When combined with the 6.6% who traveled with family and friends, four out of five visitors shared the Grand Canyon experience with family. Friends traveling together (13.1%) and those traveling alone (4.4%) completed personal groups.
- Personal group composition affected party size. Groups of family and friends comprised the largest groups (5.2 person mean), compared to friends traveling together (3.9 persons) and family only (3.5 persons).
- Respondents most often identified their ethnic origin to be White (78.7%). Visitors of Hispanic or Latino origin reflected an additional 12.4% of all visitors.
- Three out of four visitors (74.7%) obtained information about Grand Canyon National Park or the surrounding area before leaving home. Sources most often tapped were: Family and Friends (46.7%), Previous Visit (46.0%), the Internet (43.3%), Travel Guidebooks (39.2%), and the GCNP website (36.3%). These same sources were also rated highest in terms of their *importance* and *quality*.
- Not only did most visitors obtain pre-trip information, but 58.8% also booked advance reservations, most often for Lodging (82.0%), Rental cars (48.1%) and Airline travel (47.2%). Booking times varied widely, but Colorado River Trips reported the longest lead times (3 to 6 months or more), followed by airline bookings (3 to 6 months), then lodging and rental cars (1 to 3 months). Grand Canyon Railway had some of the shortest booking times (less than 1 month).
- When making travel plans, Grand Canyon National Park was considered the primary destination by 30% of those surveyed, while 66% planned to include Grand Canyon as one stop on a longer trip, reflecting the appeal of the region.
- Traveling largely in personal vehicles, visitors averaged 792 miles of driving in Arizona, most often using Interstate 40 as a travel corridor (60.1%). Other highways providing significant access to and from Grand Canyon included: Hwy 89 (46.6%), Hwy 64 Williams to GCNP (44.1%), Hwy 64 Cameron to GCNP (41.5%), and Hwy 180 (39.7%).
- On a scale of one to five, Grand Canyon visitors rated Arizona roadways highly, both for quality (4.1) and safety (4.0); less than 10 percent identified Arizona highways as being congested. Highway signage (3.9) was also perceived positively by a majority of motorists; availability of traveler amenities (3.5) and frequency of rest stops (3.1) reported the lowest overall rankings.
- Among commercial air travelers, Phoenix Sky Harbor International Airport was used most frequently (44.3%), followed by Las Vegas McCarran International Airport (37.5%). These same cities, Phoenix (33.6%) and Las Vegas (34.3%), were also the top picks for acquiring rental vehicles.

- Travelers were asked to identify communities in which they spent the night *prior to* arriving at Grand Canyon National Park. Flagstaff led the list (17.5%), followed by Williams (12.6%), Las Vegas (9.4%), Sedona (6.0%) and Phoenix (5.3%).
- Las Vegas (12.7%) led the list of communities in which visitors spent the *night after* the Grand Canyon visit, followed by Flagstaff (10.6%), Phoenix (8.0%), Williams (7.3%), and Sedona (6.7%).
- Respondents also specified *all* communities visited on the Grand Canyon trip. Again, Flagstaff led, having been visited by 40.5% of respondents; it was followed by Las Vegas (38.7%), Sedona (38.0%), Phoenix (29.1%) and Williams (26.3%). One in five respondents also visited the Navajo Nation (20.0%). Of these communities, Phoenix and Las Vegas captured the longest average overnight stays, at 3.9 and 3.1 nights respectively.
- When asked to identify other attractions visited in the region, Las Vegas (44.6%) and nearby Hoover Dam (32.7%) rated among the top five, as did Sedona/Oak Creek Canyon (34.0%) and Phoenix (28.4%). North of the Grand Canyon, Zion National Park (30.6%) in neighboring Utah was a strong regional draw as well.
- When asked about the likelihood of using public transit if available on future GCNP trips, 32.3% of visitors responded positively if it were free, while 12.5% responded yes if moderately priced ( $\leq$ \$25). Indicating no interest in public transit were 38.1% of respondents, while 17.0% were “not sure” about its use.
- Respondents’ length of stay at Grand Canyon National Park averaged 7.3 hours (median 6.0 hours) for day visits, and 5.3 days (median 2.5 days) for overnight visits. [Because unusually long stays can skew the mean, the medians here may represent more reliable estimates.]
- Visitors most often secured overnight accommodation in hotels and motels both inside and outside of Grand Canyon National Park. Still, rim campgrounds were used by one in four overnight visitors (24.8%) within GCNP, with an additional 4.0% camping in backcountry locations. Outside the park, camping and backcountry use declined to 14.9% and 2.2% respectively.
- When asked to rank their *interest* in activities and themes available at Grand Canyon National Park, visitors responded most positively to those related to natural and cultural resources. Ranked in descending order by mean, the top five areas of interest were: Canyon origins, formations and geology (3.8 mean), Animals and plants (3.7), Wilderness preservation and solitude (3.7), Cultural history of native inhabitants (3.6), Park ecosystem and ecology (3.4).

- When asked to respond to a list representing *general leisure interests*, respondents chose the following five, ranked in descending order by mean: Visiting national and state parks (4.5 mean), History or historic sites (3.9), Museums or cultural attractions (3.6), Dining out (3.5), and Archaeology or paleontology (3.3).
- Grand Canyon visitors strongly supported protecting the park's natural resources. Respondents identified the following five as the most important park resources (descending order by mean): Clean water (4.8), Clean air, Native plants animals, and Endangered species (4.7 each), Natural quiet and the sounds of nature (4.6).
- Grand Canyon visitors appeared to be somewhat prepared for the crowds they would encounter in the park; thus a majority of respondents reported that the number of people, number of cars, lack of parking spaces, helicopter or airplane overflights and other conditions that might have detracted from their visit, in fact had "no effect". Park congestion has, however, caused visitation to increase in the shoulder seasons (Spring and Fall) and decline in the traditionally busy Summer months.
- Visitors were asked to identify which park services and facilities they used, and to rank these according to their importance and quality. Overwhelmingly, Canyon Overlooks scored highest for use, importance and quality. The Visitor Center and affiliated Restroom facilities also produced high positive responses. (The complete list included 21 items.)
- Respondents were asked to report the "highlight of their visit." Topping the list of visitor highlights were: the canyon itself, the spectacular scenic views and amazing colors, great hiking trails, photo opportunities, and wildlife.
- Three-fourths of visitors reported that their park expectations were fulfilled. Principal reasons listed for expectations *not* being fulfilled included: lack of time for hiking, lack of reservations (mules, etc.), or lack of solitude. Lack of time was the most cited reason for visitors not seeing and doing all that they expected to do.
- Visitor suggestions to the Grand Canyon National Park superintendent focused on: improved signage; more shuttles/buses; more parking; more lodging and concession services; and improved safety (railing/fencing at canyon edge).
- Satisfaction with the Grand Canyon National Park experience was very high. Visitors would unanimously (99.3%) recommend a visit to friends and family.
- Grand Canyon visitor expenditures averaged \$536 per travel party *in the park* and \$595 per travel party *within 90 miles of the park*.
- The total annual economic impact (direct, indirect and induced) of Grand Canyon National Park visitors was \$687 million of output into the regional economy, which supported 12,000 full-time equivalent jobs in the area.