Arizona World Tour Canada Presentation

December 2015

CWW
connectworldwide
canada

Canada Outbound Travel at a Glance

Total Canadian Outbound Travel

- Canadians made more than 23.1 million trips to the U.S. and other destinations between January and August 2015.

Canadian Travel to the United States

- From January to August, Canadians made -8.5 % fewer overnight trips.
- The decline is due to a drop of more than one million trips by automobile.
- Direct passenger arrivals to New Orleans (12.0%), Hawaii (+9.9%), Los Angeles (6.5%), Phoenix (5.8%), and Las Vegas (4.1%) all recorded year-over-year increases compared to the same period a year ago.

Canada Outbound Travel at a Glance

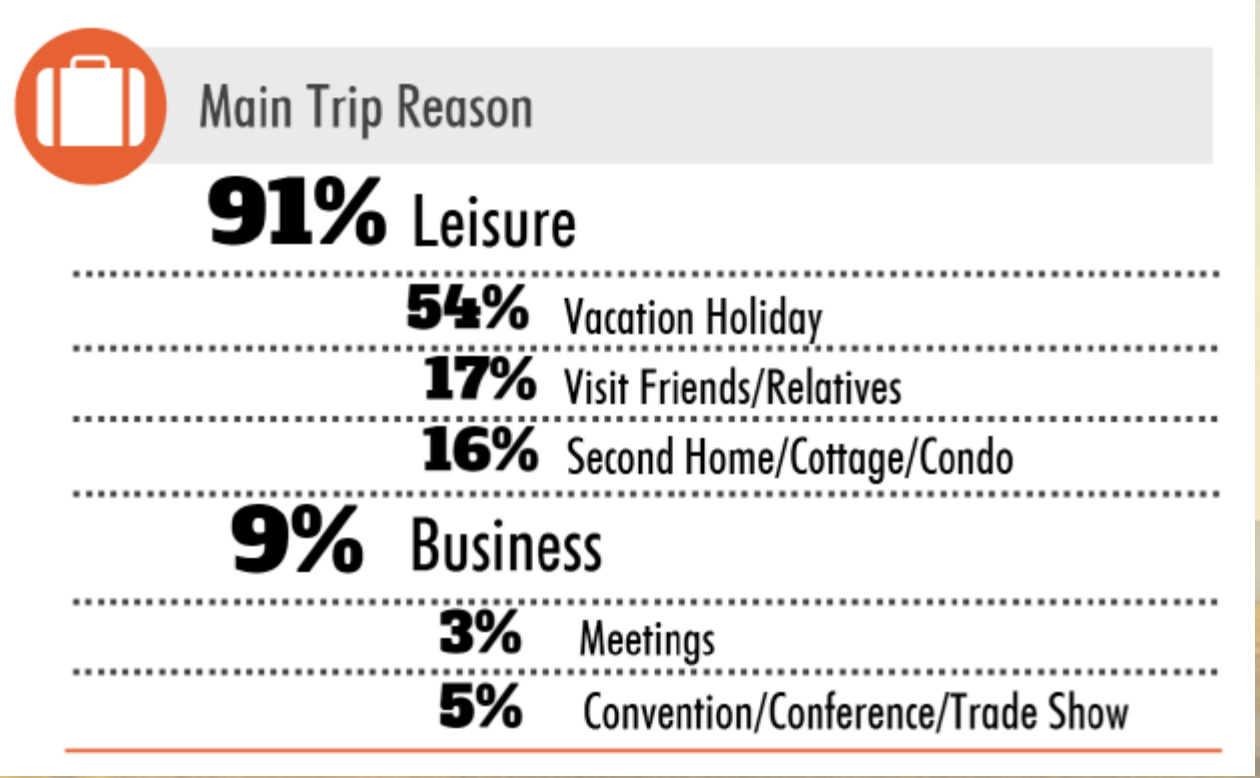
Direct Air Arrivals to Select U.S. Destinations (January-August)

Destination	2011	2012	2013	2014	2015	2015 vs. 2014	CARG*
Orlando	316,972	338,007	353,849	357,981	380,330	6.2%	4.8%
Sarasota	11,365	11,341	11,590	13,907	16,872	21.3%	11.8%
Tampa	81,877	84,816	90,971	100,898	115,273	14.2%	5.6%
Miami	257,496	262,171	268,974	266,555	270,916	1.6%	3.5%
Fort Myers	53,150	62,117	68,537	77,049	82,686	7.3%	13.0%
Palm Beach	16,318	21,862	26,002	28,882	26,939	-6.7%	4.8%
Fort Lauderdale	325,749	326,569	335,010	365,553	394,116	7.8%	6.9%
Total Florida	***1,062,927***	***1,106,883***	***1,154,933***	***1,210,825***	***1,287,132***	***6.3%***	***5.7%***
Hawaii	184,736	207,030	208,393	222,736	244,756	9.9%	7.7%
Las Vegas	506,903	516,343	513,889	582,935	606,798	4.1%	4.2%
Los Angeles	604,623	591,498	626,482	694,510	739,859	6.5%	3.5%
New Orleans	11,949	12,296	12,006	12,563	14,072	12.0%	--
Phoenix	288,309	308,641	307,726	323,974	342,668	5.8%	7.5%

Sources: Hawaii's figures from State of Hawaii Department of Business, Economic Development & Tourism. Other figures are from respective airport authorities.

**CARG = Compound Average Annual Rate of growth 2008 to 2015.*

Why Canadians visit Arizona



Amazing Weather!

Source: Arizona Office of Tourism Research Division

What Canadians love about Arizona

Natural Beauty

- Desert landscape
- Sedona Red Rocks
- Grand Canyon

Dining/Gastronomy

- Farm-to-table
- Local & indigenous foods
- Wine regions

Local Lifestyle

- Year-round golf & outdoor activities
- Unique and authentic offerings

Cultural/Historical Attractions

- American Indian
- Old West
- Architecture
- Route 66
- Museums

Source: Brand USA 2013 Business Plan

When Canadians visit Arizona

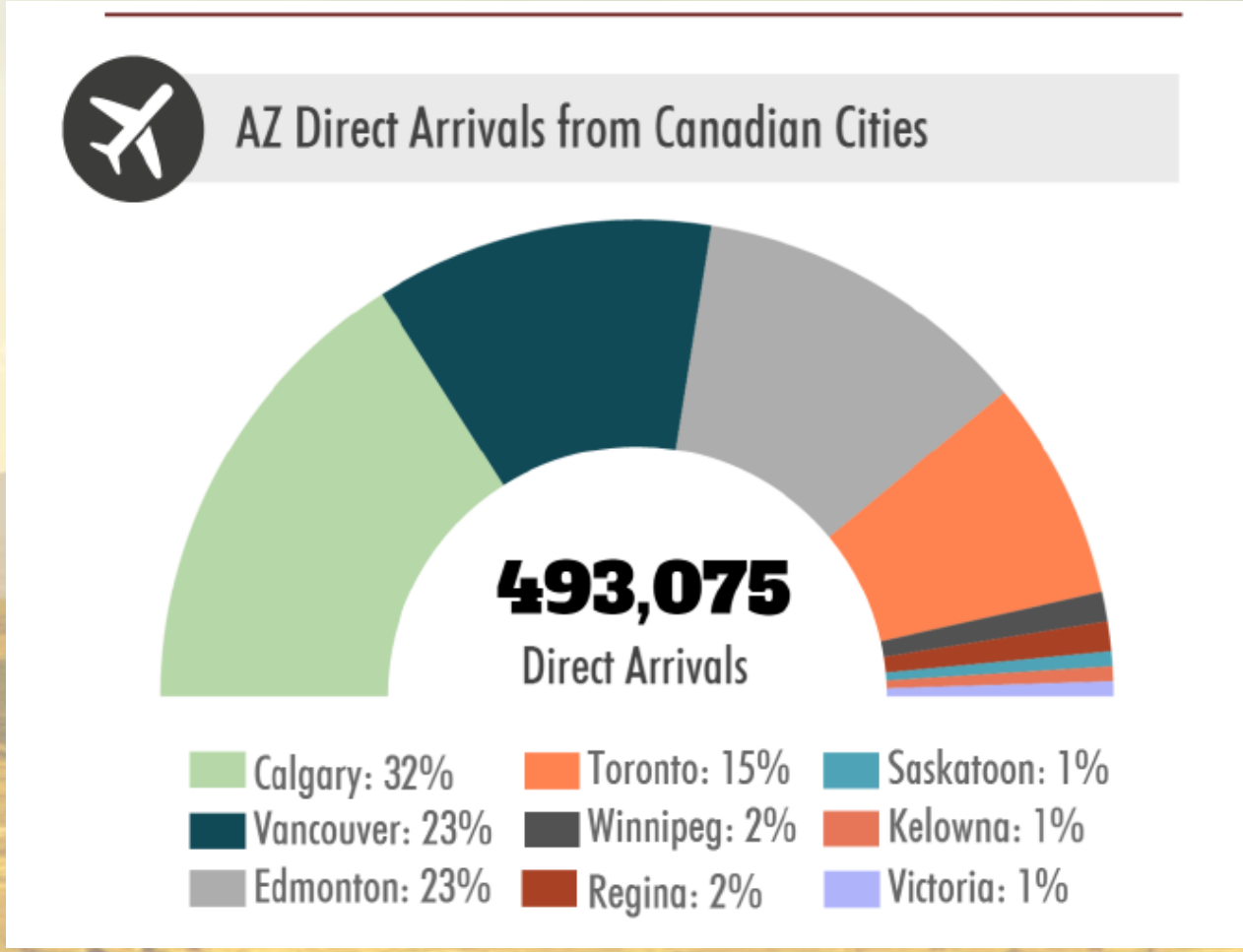
Visa Credit Card Travel Spending

Canadian Visa Card Spending ranked #1 in 2014 with 47% of total International Travel Spending in Arizona.

By Quarter

Source: Arizona Office of Tourism Research Division

Originating Markets



Source: Arizona Office of Tourism Research Division

Key Demographics

1. **Zoomers ("Boomers with Zip")**

Zoomers account for 54% of all travel from Canada.

- This is the only demographic whose travel habits are not expected to change.
- Canadians over the age of 45 account for nearly half of the 34 million Canadians.
- By 2017 there will be more seniors (65+) in Canada than children.

2. **Millennials (18 to 34 years old)**

- The millennial travel sector is growing fast - As of 2014, there were an estimated 8.25 million Canadians in this age group, accounting for approximately 23% of Canada's total population
- Millennials exhibit the highest propensity to spend their internet time on mobile devices, extraordinary engagement through social media and shop online

3. **Multi-generational Trips Remain a Top Travel Trend**

Multi-generational travel is growing quickly and continues to present a significant market opportunity.

- 40 % of all active leisure travelers have taken at least one multi-generational trip (trip of parties in three or more generations).
- More than three-quarters (77 %) of multi generational trips took place around a "life event". The most frequently cited celebrations were "milestone birthdays, anniversaries, family reunions and weddings.

Source: CARP, Destination Canada

Snapshot of Canadian Media

The media landscape in Canada is changing rapidly. 2015 saw massive newsroom layoffs, consolidation of ownership, and journalists spread thinner than ever before. Digital and Social Media, previously regarded as an "added bonus" to editorial, are now taking centre stage.

In 2015, Buzzfeed, VICE and AOL all opened studios in Canada, signifying the shift towards targeting an online audience. This is because Canadians are active consumers of digital media:

1. Canadians have the second highest engagement worldwide (after the USA) spending 76 hours per month online
2. Canadians rank 1st in terms of monthly page views and number of visits to sites online
3. 77% of Canadians watch videos online
4. We watch an average of 25 hours of online videos per month, 291 videos per viewer (second worldwide to the USA)
5. Per Capita, Canadians are the #1 users of Facebook.

Source: Canada Media Fund

Digital in Canada

A snapshot of the Country's Key Digital Statistical Indicators

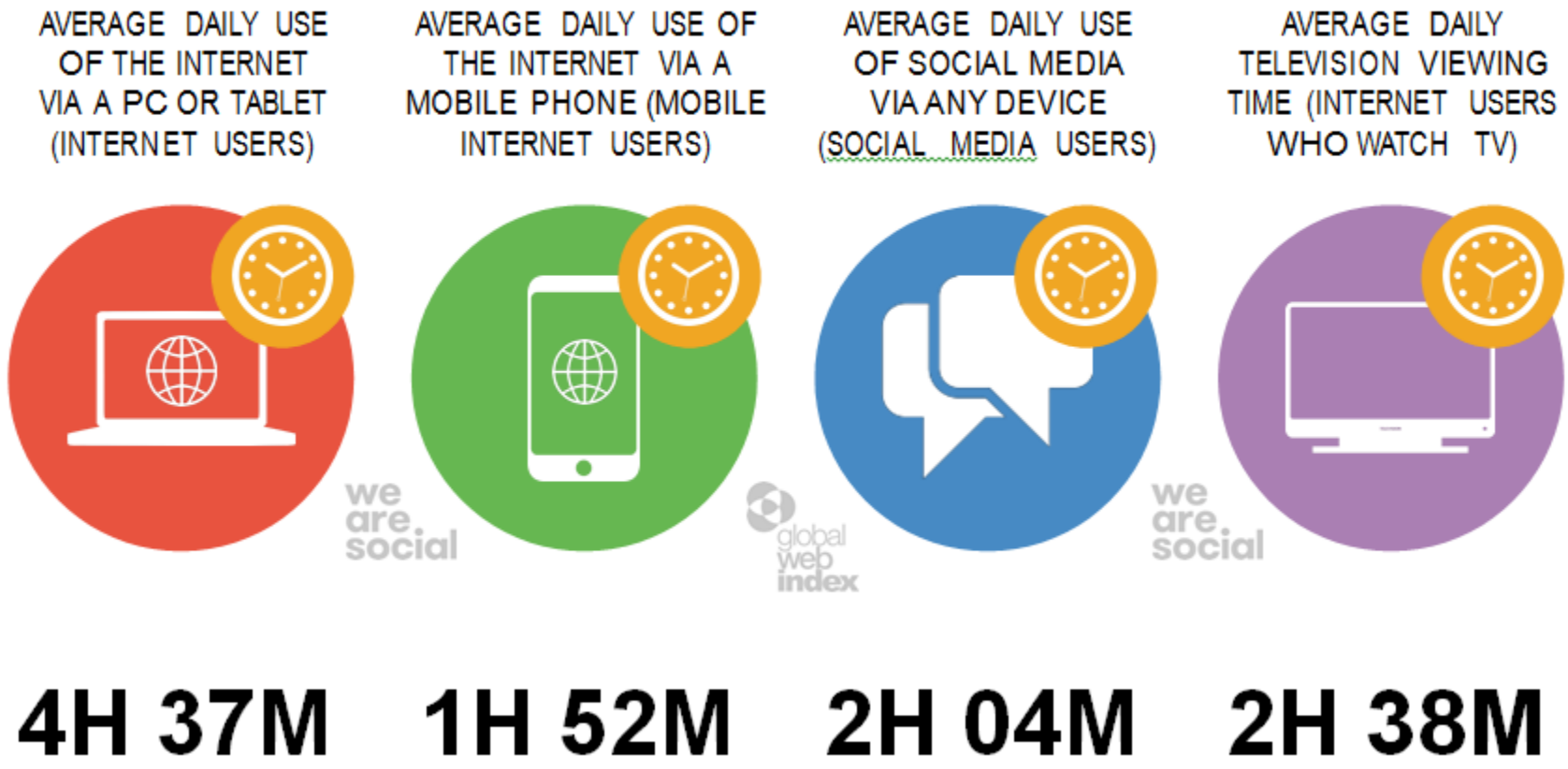
2015

TOTAL POPULATION	ACTIVE INTERNET USERS	ACTIVE SOCIAL MEDIA ACCOUNTS	MOBILE CONNECTIONS	ACTIVE MOBILE SOCIAL ACCOUNTS
35.7M MILLION	**33.0M MILLION**	**20.0M MILLION**	**29.0M MILLION**	**16.2M MILLION**
URBANISATION: 81%	**PENETRATION: 93%**	**PENETRATION: 56%**	**vs. POPULATION: 81%**	**PENETRATION: 45%**
FIGURE REPRESENTS TOTAL NATIONAL POPULATION, INCLUDING CHILDREN	FIGURE INCLUDES ACCESS VIA FIXED AND MOBILE CONNECTIONS	FIGURE REPRESENTS ACTIVE USER ACCOUNTS, NOT UNIQUE USERS	FIGURE REPRESENTS MOBILE SUBSCRIPTIONS, NOT UNIQUE USERS	FIGURE REPRESENTS ACTIVE USER ACCOUNTS, NOT UNIQUE USERS

we are social

Time Spent With Media

2015



Competition at a Glance

Florida, California, Nevada, and Hawaii

Increase visitation through Public Relations

Diversify Communication Strategies:

Integration is key!

- Print is not obsolete, but it no longer reins supreme on its own.
- Online-only outlets (Huffington Post for example) can be just as effective in reaching your target consumers and raising awareness of Arizona as traditional media.
- Ensure each press visit includes a solid social media strategy. Be as active as you can be online and in social media. Remember the key to social media success is to engage the audience, not just inform.
- Video – if it’s not on video, it didn’t exist

THANK YOU!

Charmaine Singh
CWW Canada
charmaine@cww.travel

Marsha Mowers
CWW Canada
marsham@cww.travel