



# International Visitation to Arizona

November 4, 2016



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# Agenda

- 2015 Visitation Volume
- Overseas Visitor Profiles
- Canadian Visitor Profile
- Mexican Visitor Profile

# Where is the data coming from?



- Provides visitor volume
- Annual
- Pro: AZ-specific and reliable
- Con: No profile data



- Survey of International Air Travelers (SIAT)
- Annual
- Pro: AZ specific
- Con: Small sample

## VisaVue<sup>®</sup> Travel

- Visa card spending data
- Quarterly
- Pro: AZ and region specific
- Con: Not every country has the same rate of use for Visa cards

# Where is the data coming from?



## Statistics Canada

- Canadian profile and spending data
- Pro: highly reliable
- Con: break in the series in 2013, so trending is difficult

## Mexican Visitors to Arizona

- AOT-sponsored intercept study conducted at the border and airports in 2007-2008
- Pro: custom to Arizona and the most complete and accurate study ever completed on Mexican visitors to AZ
- Con: outdated

# Visitor Volume

International Overnight Visits to Arizona						
	2010	2011	2012	2013	2014	2015
Mexico	3,310,184	3,158,622	3,373,909	3,635,939	3,854,431	3,790,919
Canada	650,000	703,800	728,000	850,200	896,467	928,051
Germany	116,580	120,000	120,229	119,971	127,705	133,903
United Kingdom	131,107	123,000	117,000	114,186	116,542	117,581
France	97,108	110,000	106,865	105,846	113,385	111,960
China	20,972	25,000	31,000	36,705	52,105	63,911
Korea Republic of	41,701	40,000	44,111	52,725	54,015	61,128
Japan	40,931	45,000	47,015	49,080	51,602	54,803
Australia	40,812	44,000	45,803	43,711	47,535	54,466
Switzerland	35,507	39,000	36,674	34,380	36,554	36,502
Brazil	20,349	23,000	27,001	27,978	30,992	29,649
Other Overseas	276,324	295,000	295,650	296,194	321,878	329,263
Overseas Total	821,391	864,000	871,347	880,777	952,313	993,167
Total International	4,781,575	4,726,422	4,973,256	5,366,916	5,703,210	5,712,138

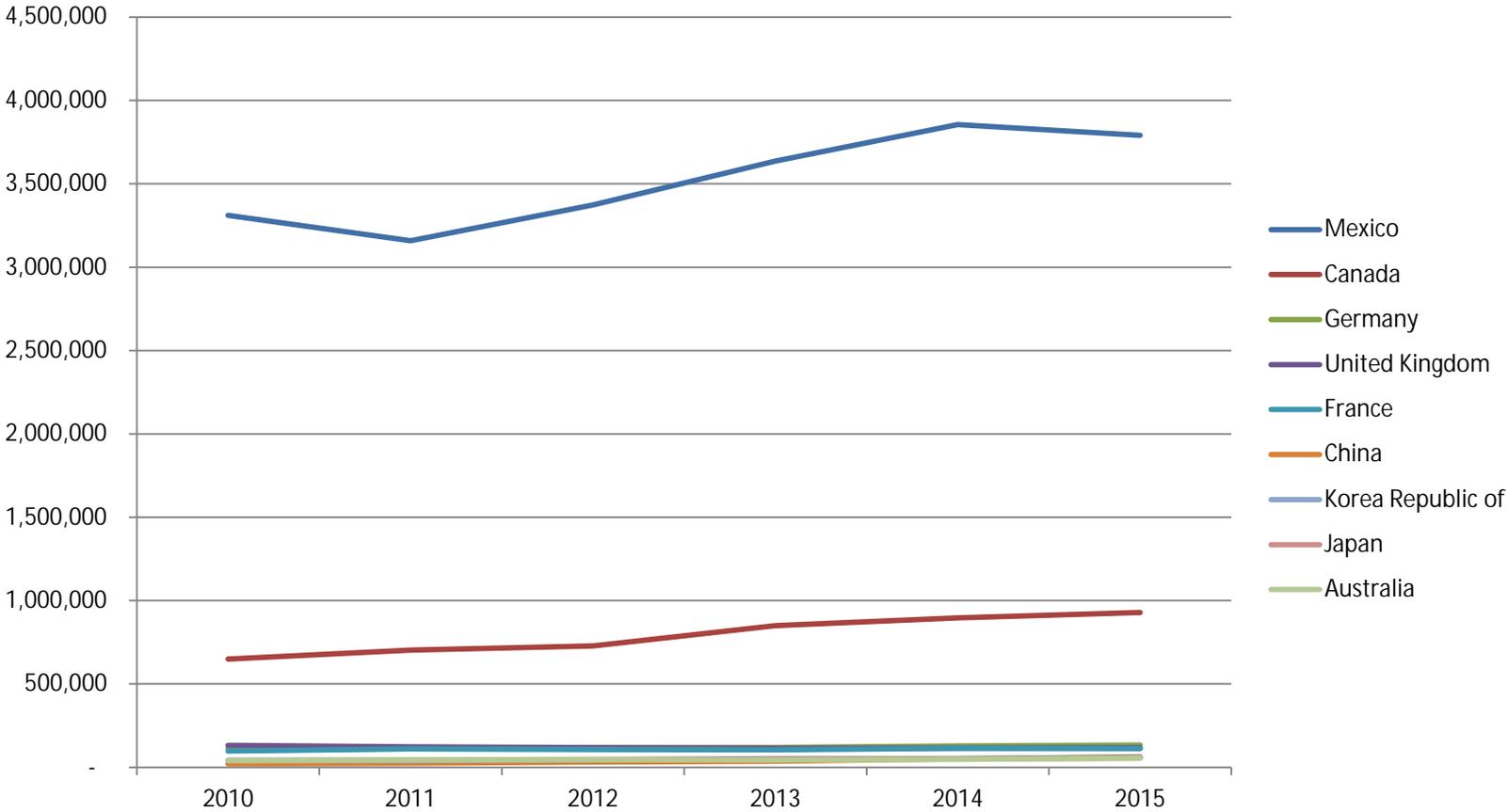


# Visitor Volume % Change

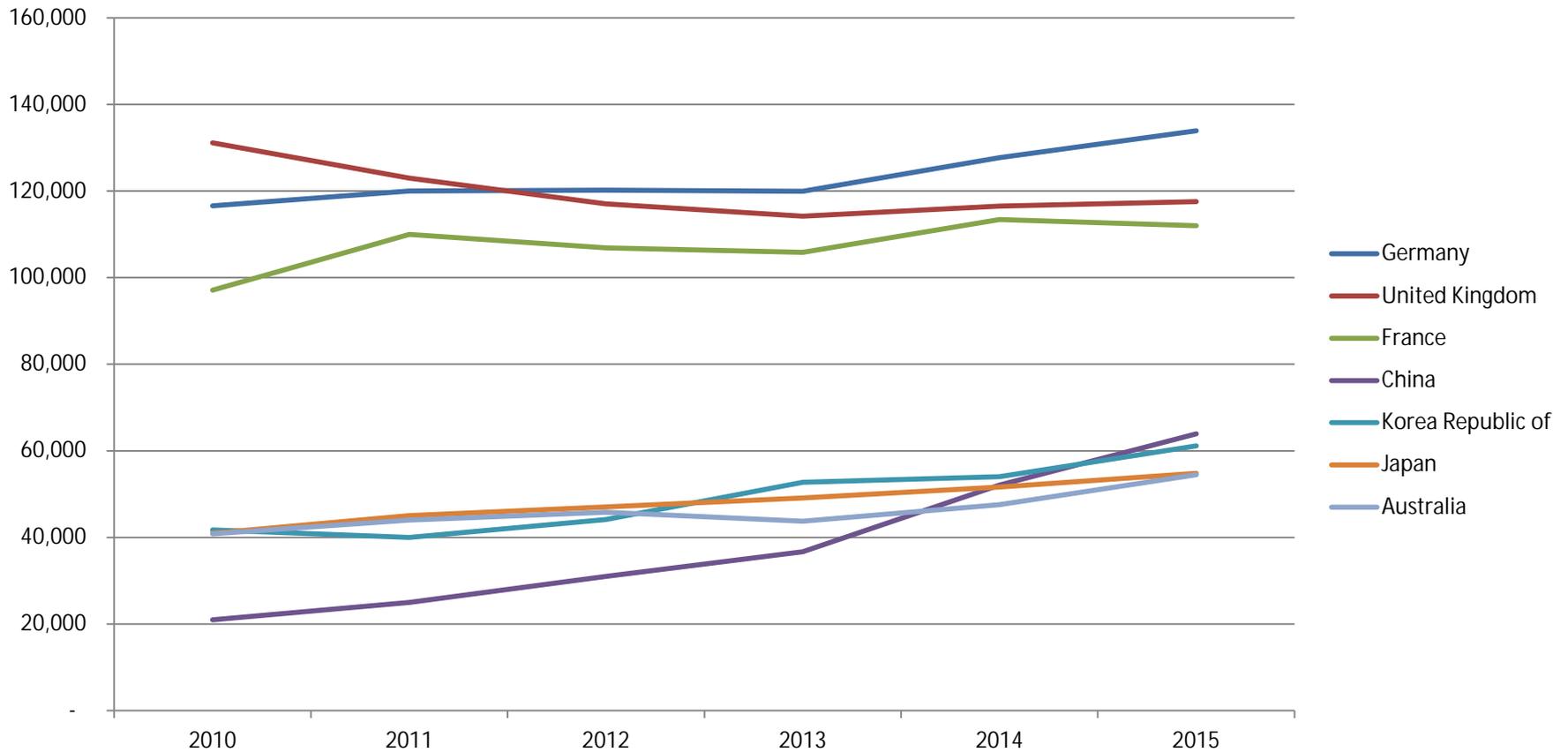
International Overnight Visits to Arizona					
	2011	2012	2013	2014	2015
Mexico	-4.6%	6.8%	7.8%	6.0%	-1.6%
Canada	8.3%	3.4%	16.8%	5.4%	3.5%
Germany	2.9%	0.2%	-0.2%	6.4%	4.9%
United Kingdom	-6.2%	-4.9%	-2.4%	2.1%	0.9%
France	13.3%	-2.9%	-1.0%	7.1%	-1.3%
China	19.2%	24.0%	18.4%	42.0%	22.7%
Korea Republic of	-4.1%	10.3%	19.5%	2.4%	13.2%
Japan	9.9%	4.5%	4.4%	5.1%	6.2%
Australia	7.8%	4.1%	-4.6%	8.7%	14.6%
Switzerland	9.8%	-6.0%	-6.3%	6.3%	-0.1%
Brazil	13.0%	17.4%	3.6%	10.8%	-4.3%
Other Overseas	6.8%	0.2%	0.2%	8.7%	2.3%
Overseas Total	5.2%	0.9%	1.1%	8.1%	4.3%
Total International	-1.2%	5.2%	7.9%	6.3%	0.2%



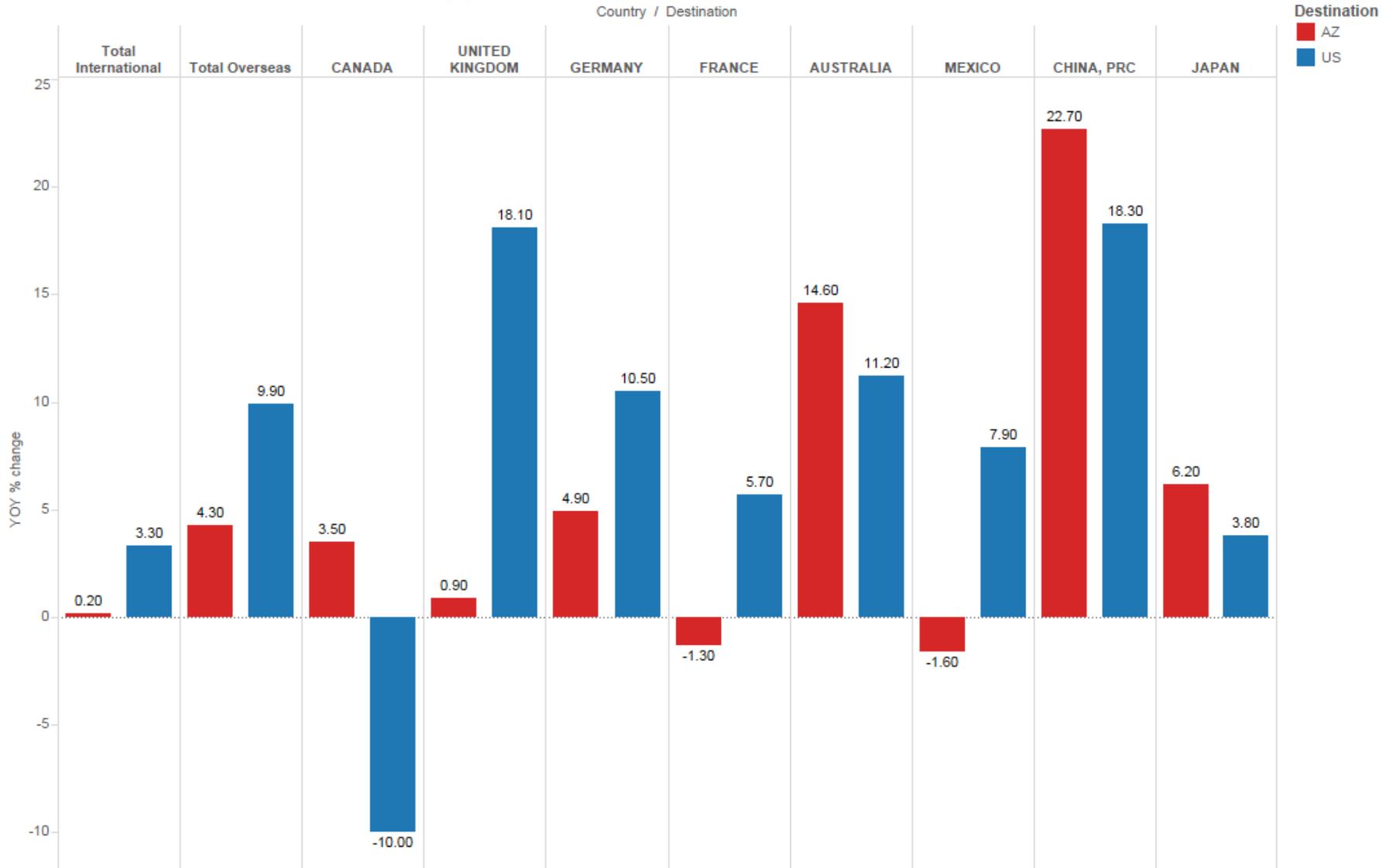
# Visitor Volume to AZ Trend



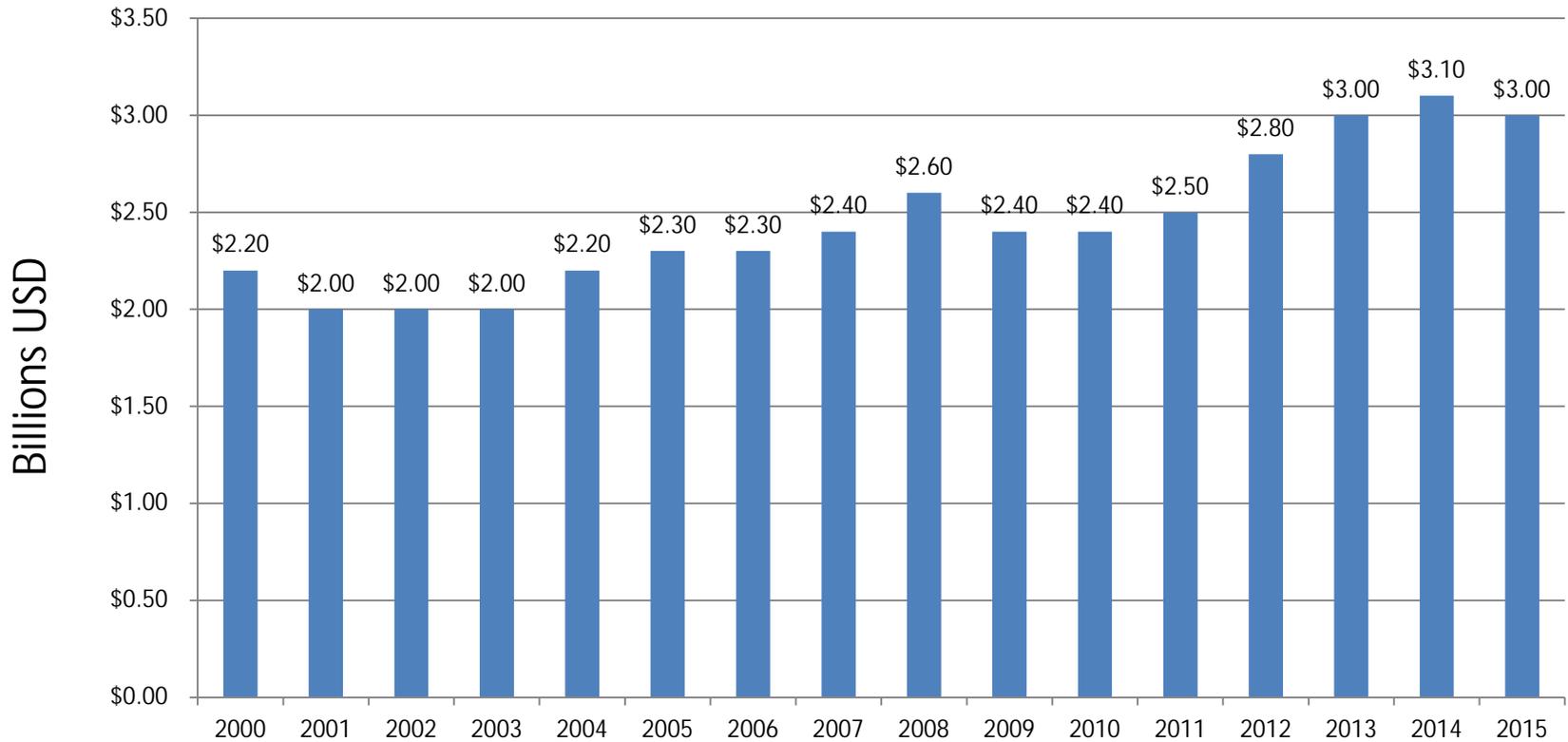
# Visitor Volume to AZ Trend (excl. Mexico and Canada)



# YOY % Change in Visitation, US v. AZ



# International Spending in AZ



# Impact of the Strong US Dollar

As the value of the dollar **increases**  
we would expect spending in AZ to **decrease**

	US Dollar Value Against Local Currency					Visa Card Spending in AZ
	10 vs.11	11 vs.12	12 vs.13	13 vs.14	14 vs.15	14 vs.15
AUSTRALIA	-10.9%	-0.3%	7.0%	7.3%	20.0%	-5.4%
CANADA	-4.0%	1.0%	3.1%	7.3%	15.8%	-15.7%
CHINA	-4.5%	-2.4%	-2.5%	0.2%	2.0%	34.8%
EURO	-4.6%	8.2%	-3.2%	0.0%	19.7%	-13.2%
JAPAN	-9.2%	0.1%	22.2%	8.5%	14.3%	-0.3%
MEXICO	-1.5%	5.7%	-2.9%	4.2%	19.2%	-22.6%
UNITED KINGDOM	-3.6%	1.1%	1.3%	-5.0%	7.8%	-2.2%

# Market Share of International Visa Card Spending

Rank	Top 10 States	US Market Share		
		2014	2015	% Change
1	FLORIDA	20.8%	20.2%	-3%
2	CALIFORNIA	17.1%	18.1%	6%
3	NEW YORK	16.4%	16.3%	0%
4	NEVADA	5.9%	5.8%	-1%
5	TEXAS	6.2%	5.8%	-6%
6	HAWAII	5.3%	5.2%	-2%
7	WASHINGTON	3.3%	3.2%	-1%
8	ILLINOIS	2.3%	2.5%	8%
9	MASSACHUSETTS	2.1%	2.2%	5%
10	<b>ARIZONA</b>	1.9%	1.9%	-4%

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# Overseas Visitor Profiles

China, France, Germany, Japan, United Kingdom



# How to read SIAT legends:

■ 13-15  
PRC/HK/  
Taiw. AZ

■ 14-15  
France  
To AZ

■ 14-15  
UK  
To AZ

■ 14-15  
Germany  
To AZ

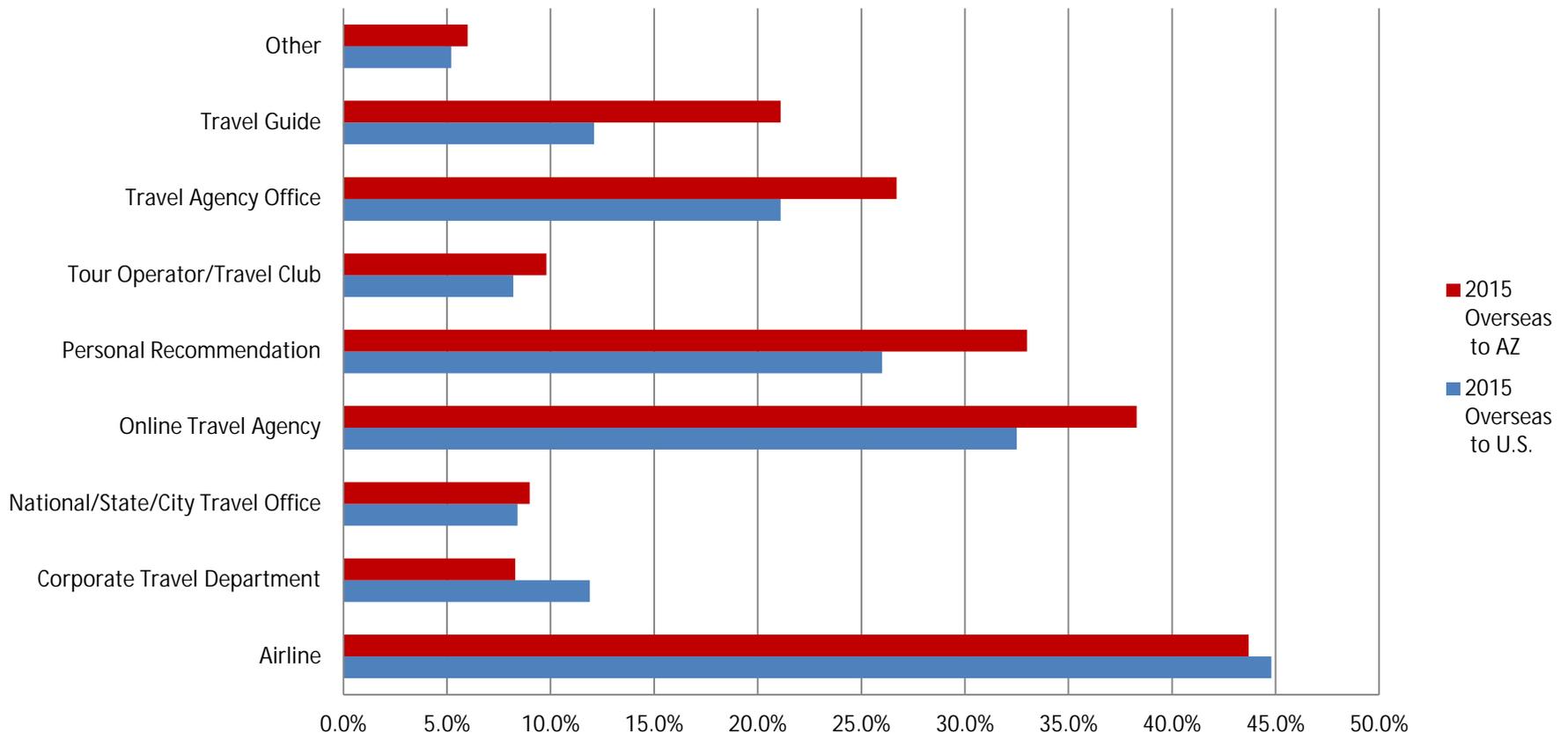
■ 14-15  
Japan  
To AZ

Sample years: In many cases, SIAT combines the sample (number of people who responded to the survey) from several years to create an accurate profile. In this case, the profile for China/Hong Kong/Taiwan represents all survey respondents who said they were going to Arizona in 2013, 2014, and 2015.

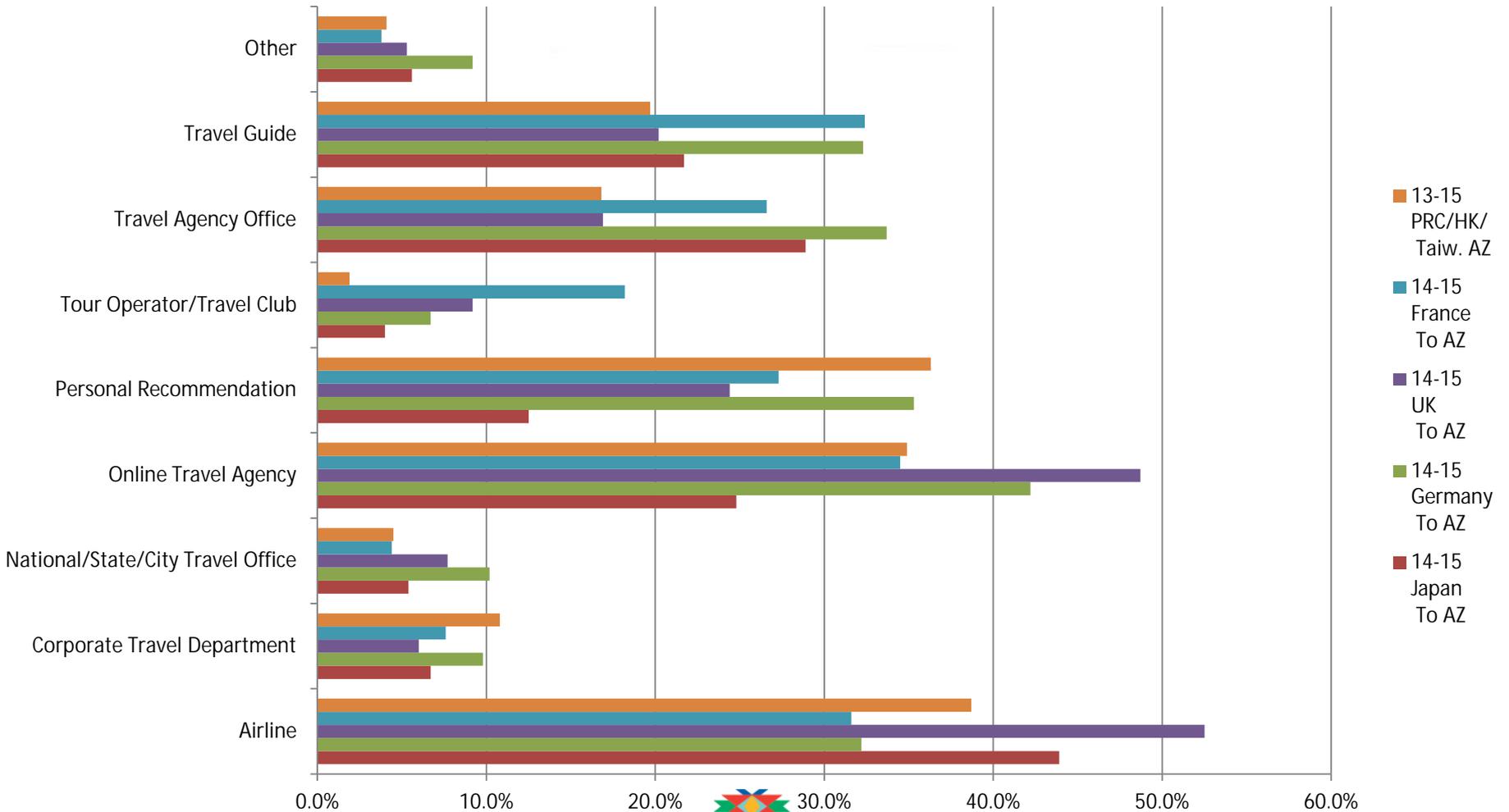
Destination: Indicates that the survey respondents had visited or were on their way to Arizona on their current trip.

# AZ to US Comparison

How did you obtain the information used for planning this trip?

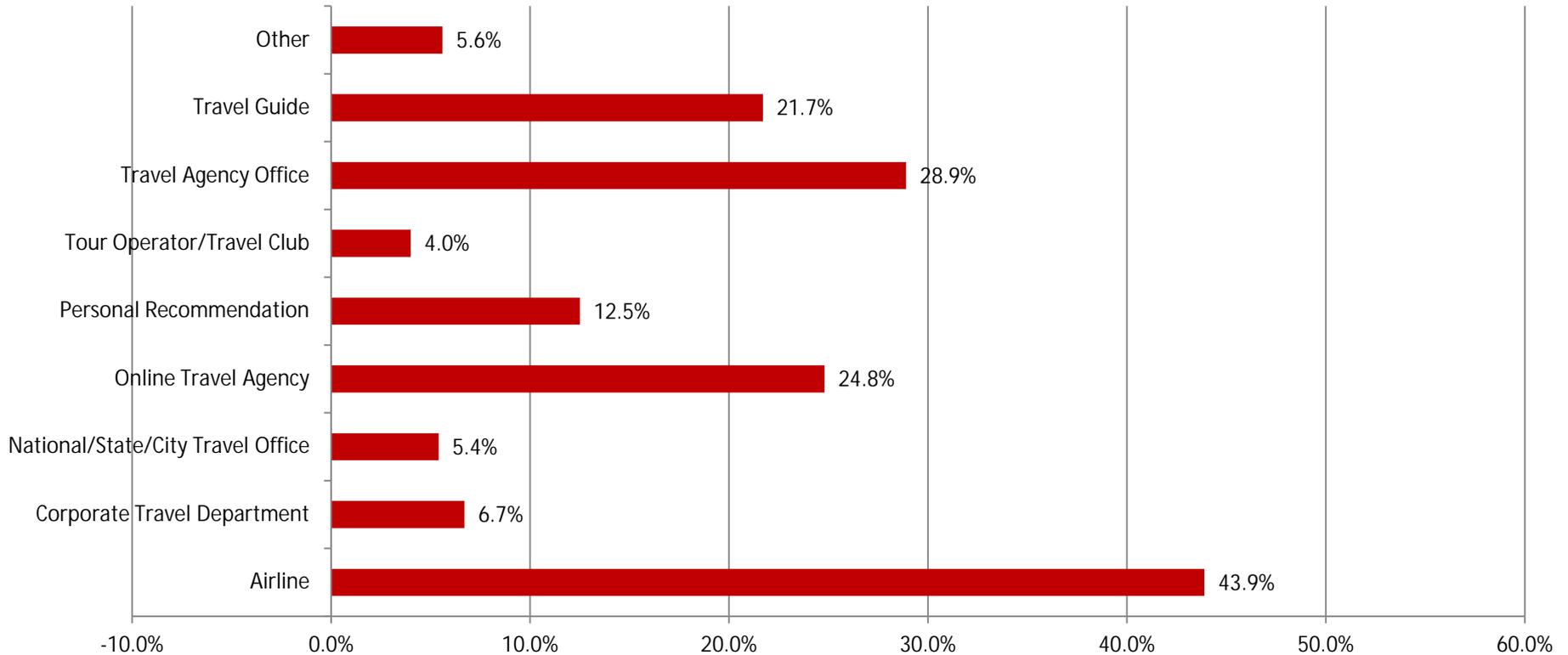


# How did you obtain the information used for planning this trip?



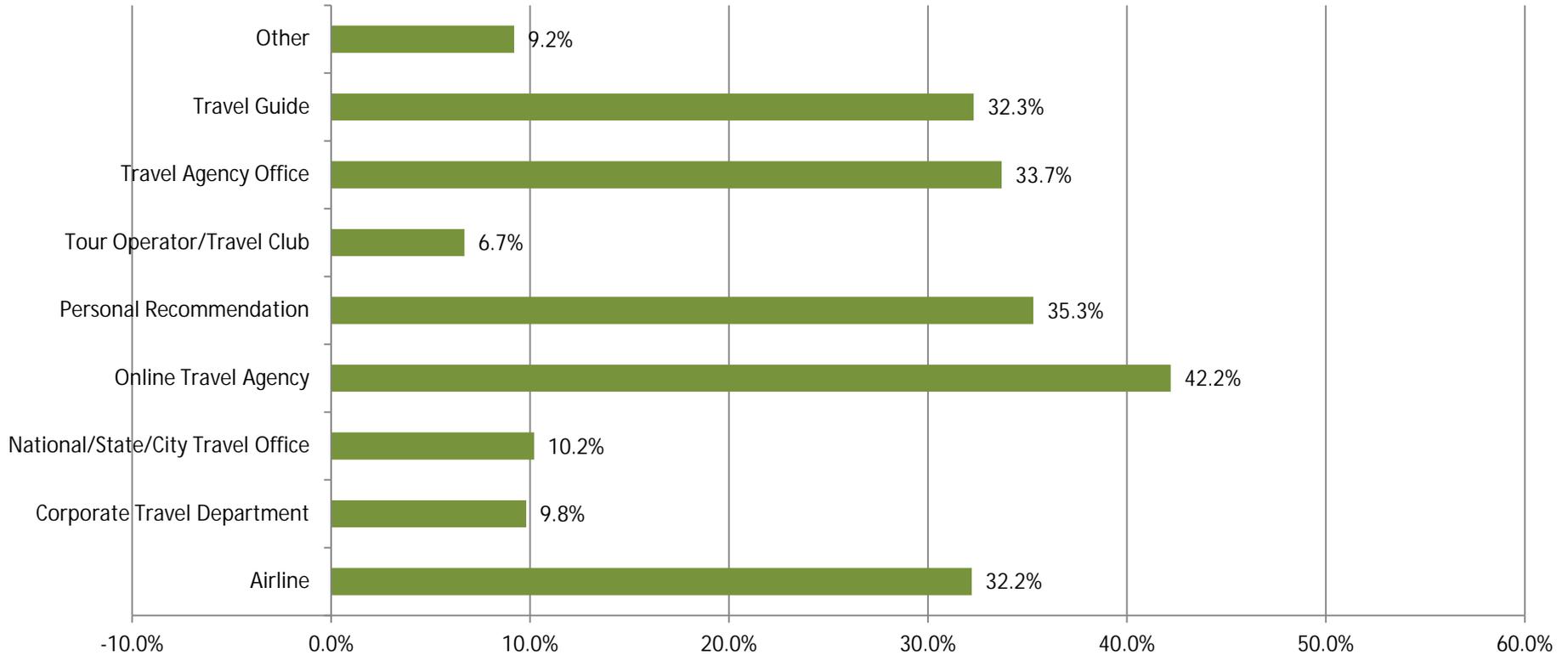
# Japan

## How did you obtain the information used for planning this trip?



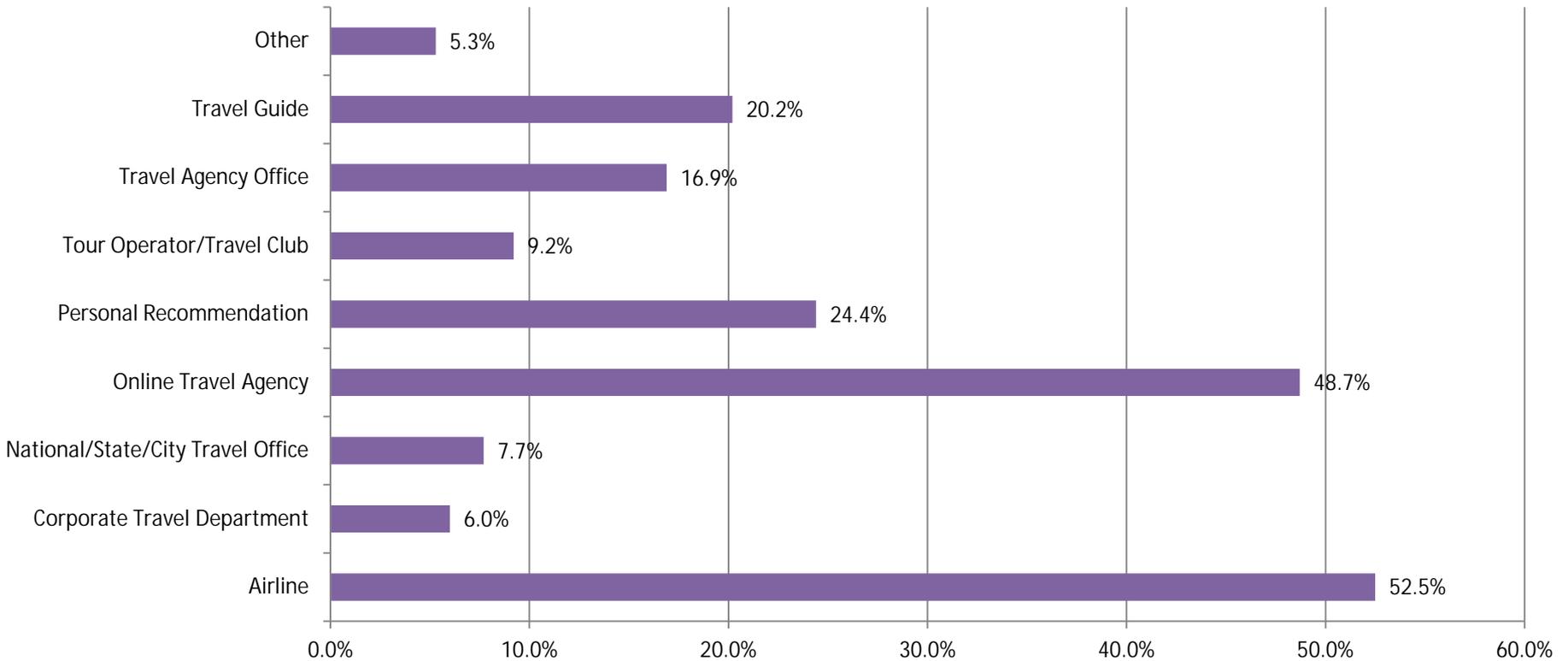
# Germany

## How did you obtain the information used for planning this trip?



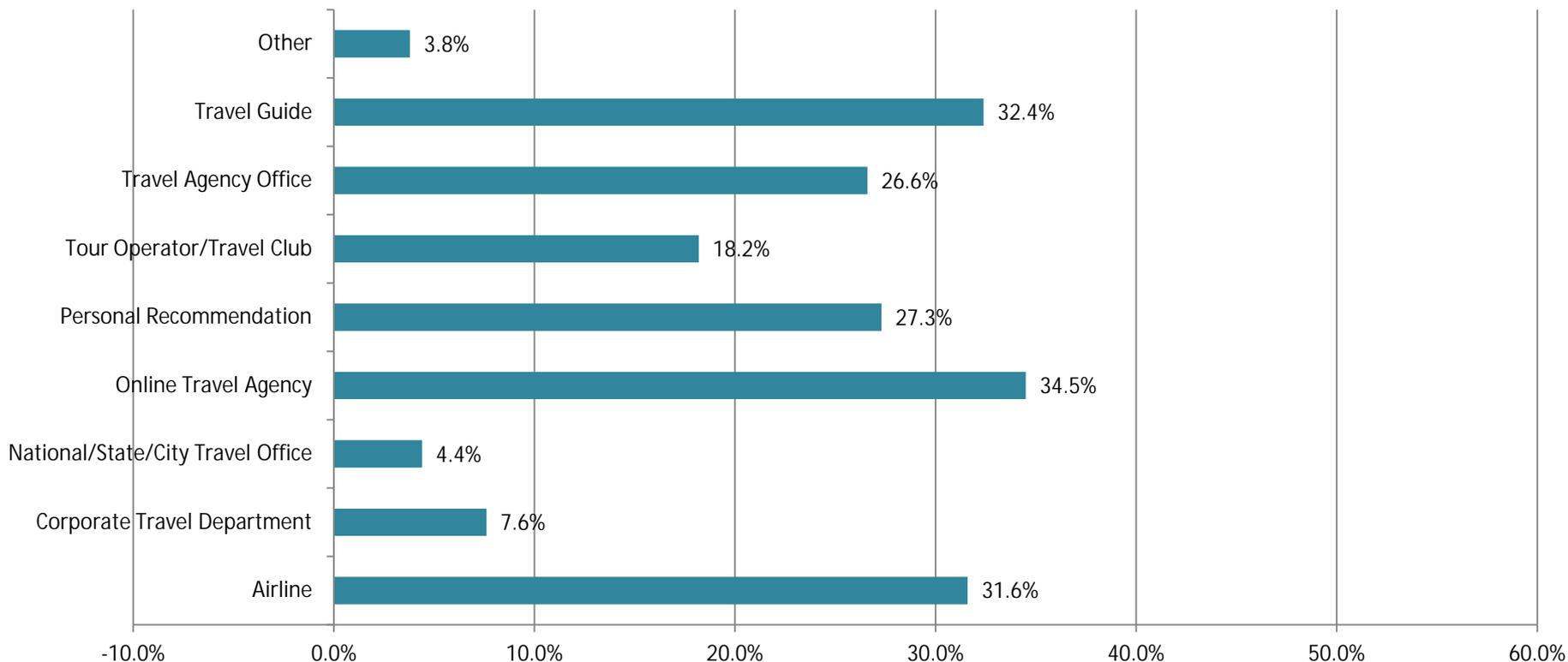
# United Kingdom

## How did you obtain the information used for planning this trip?



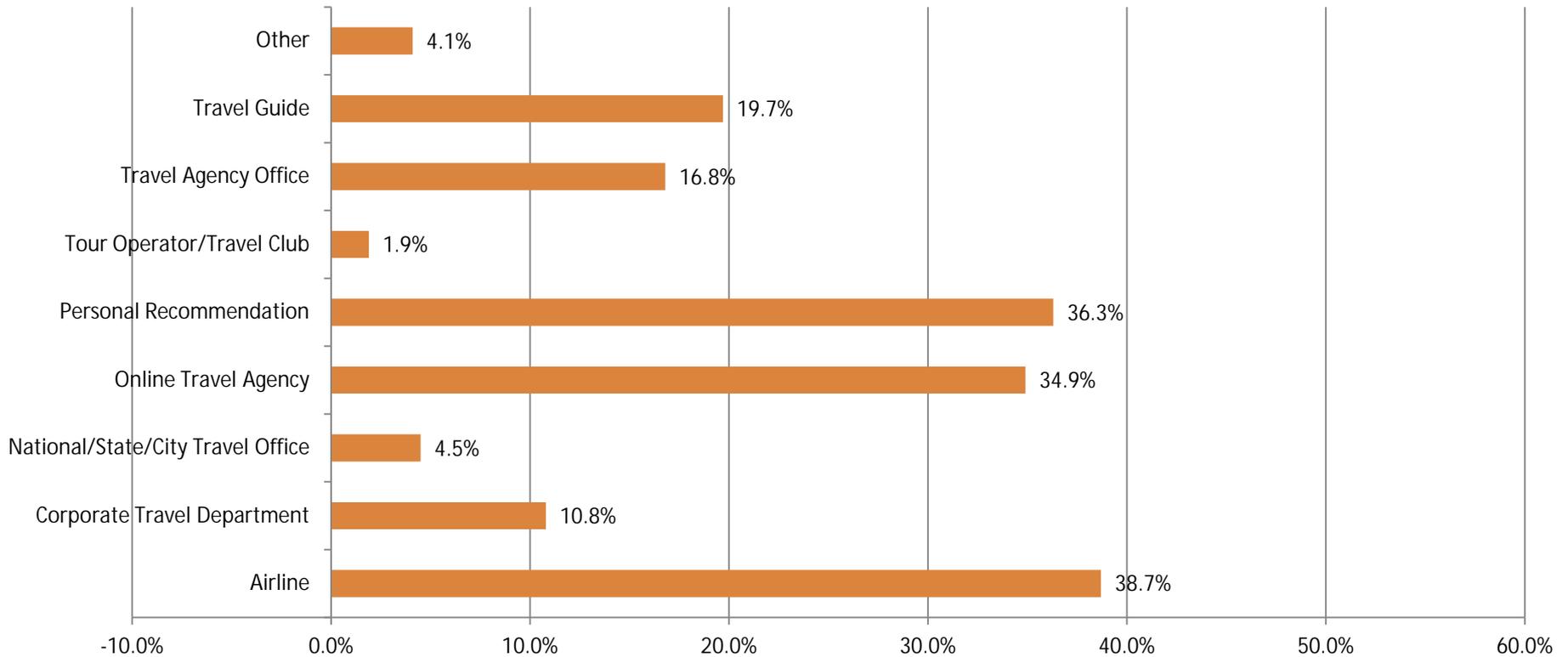
# France

## How did you obtain the information used for planning this trip?



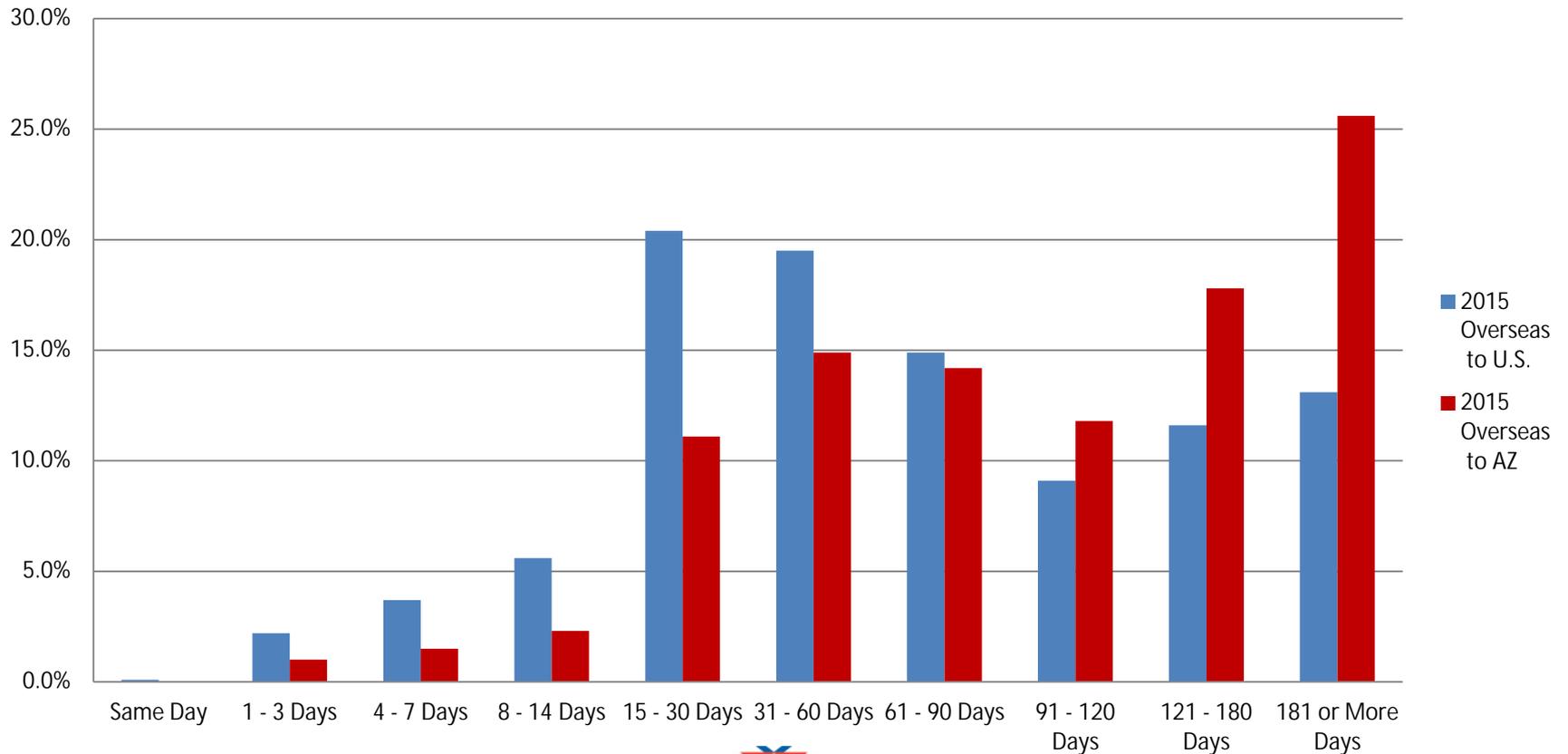
# China/Hong Kong/Taiwan

How did you obtain the information used for planning this trip?



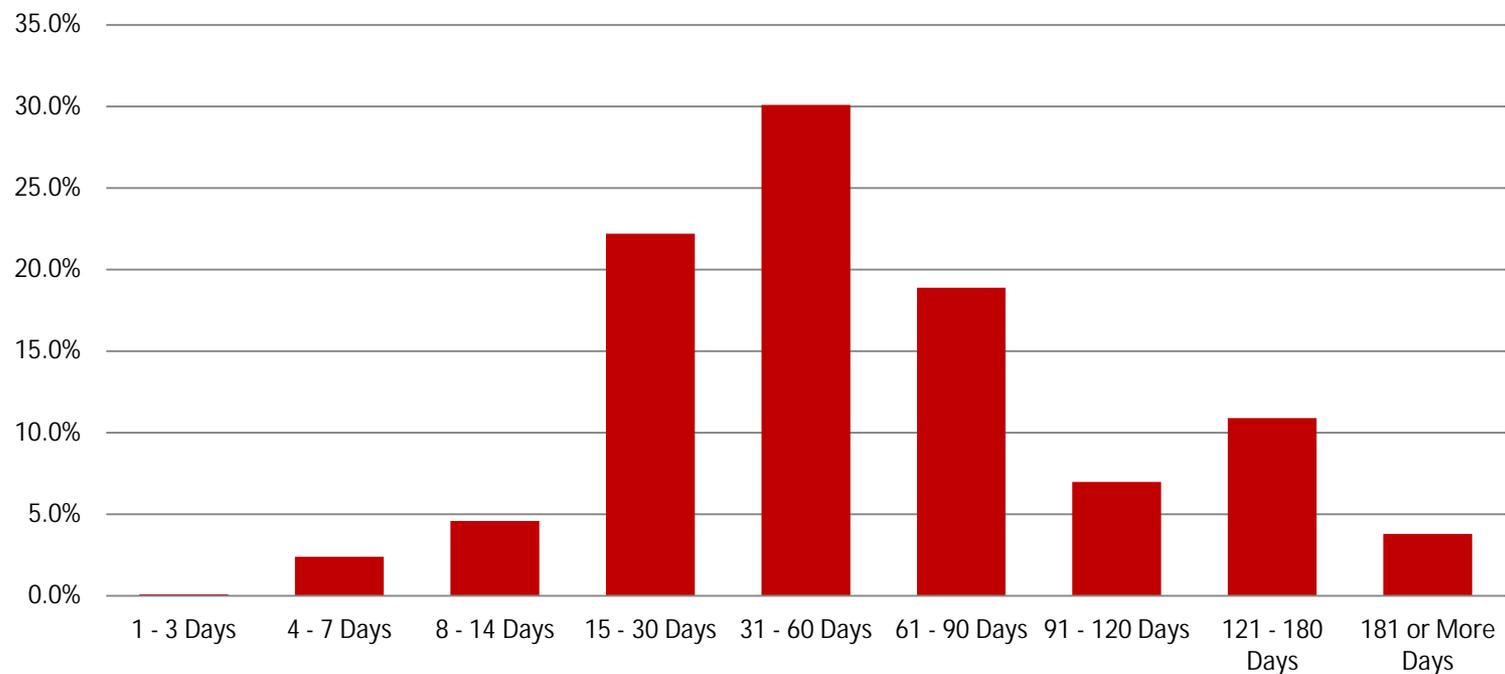
# AZ compared to US

How many days prior to departure did you make the decision to travel?



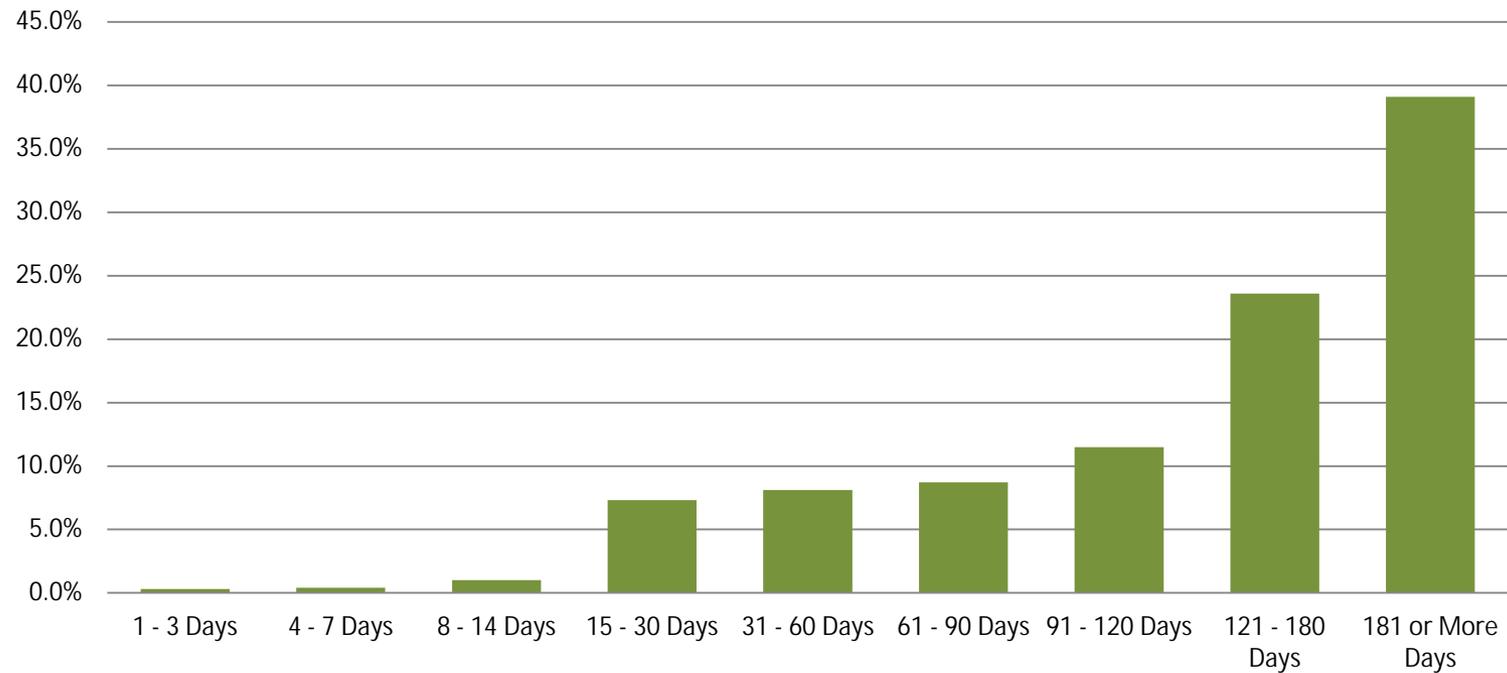
# Japan

How many days prior to departure did you make the *decision* to travel?



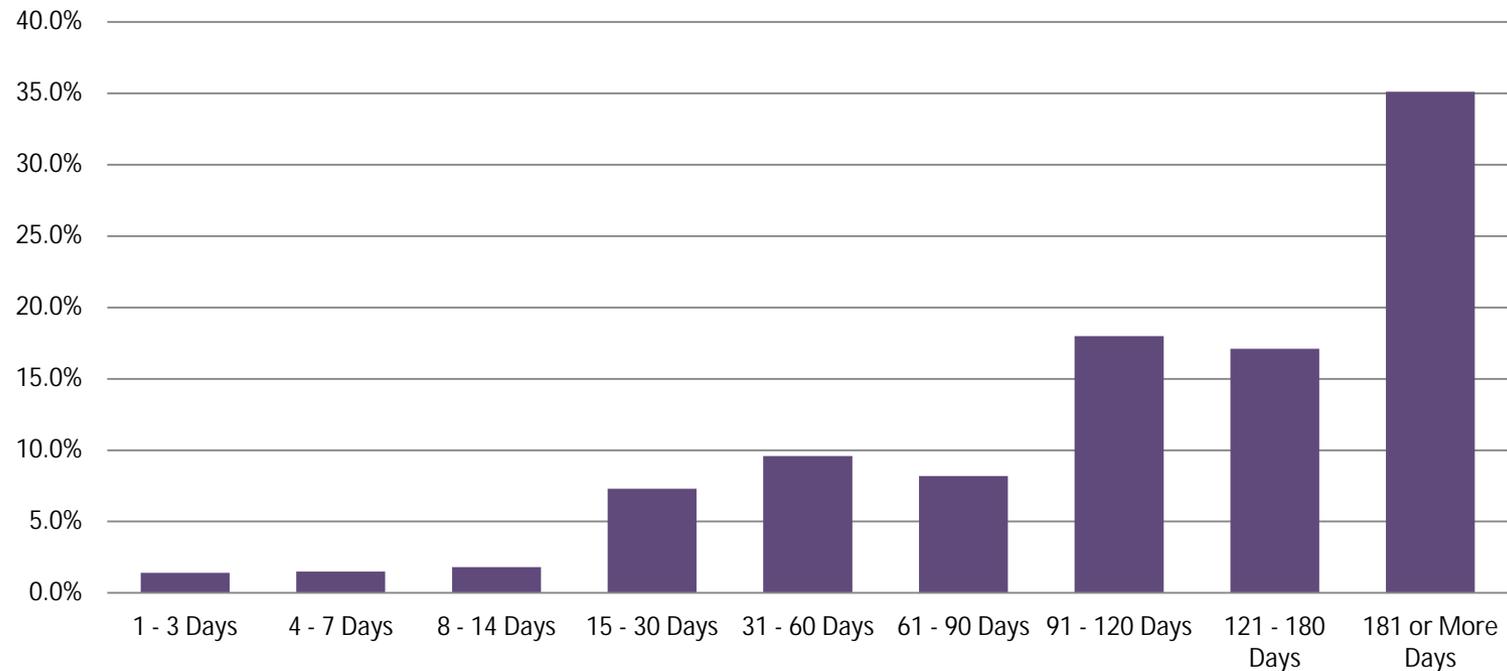
# Germany

How many days prior to departure did you make the *decision* to travel?



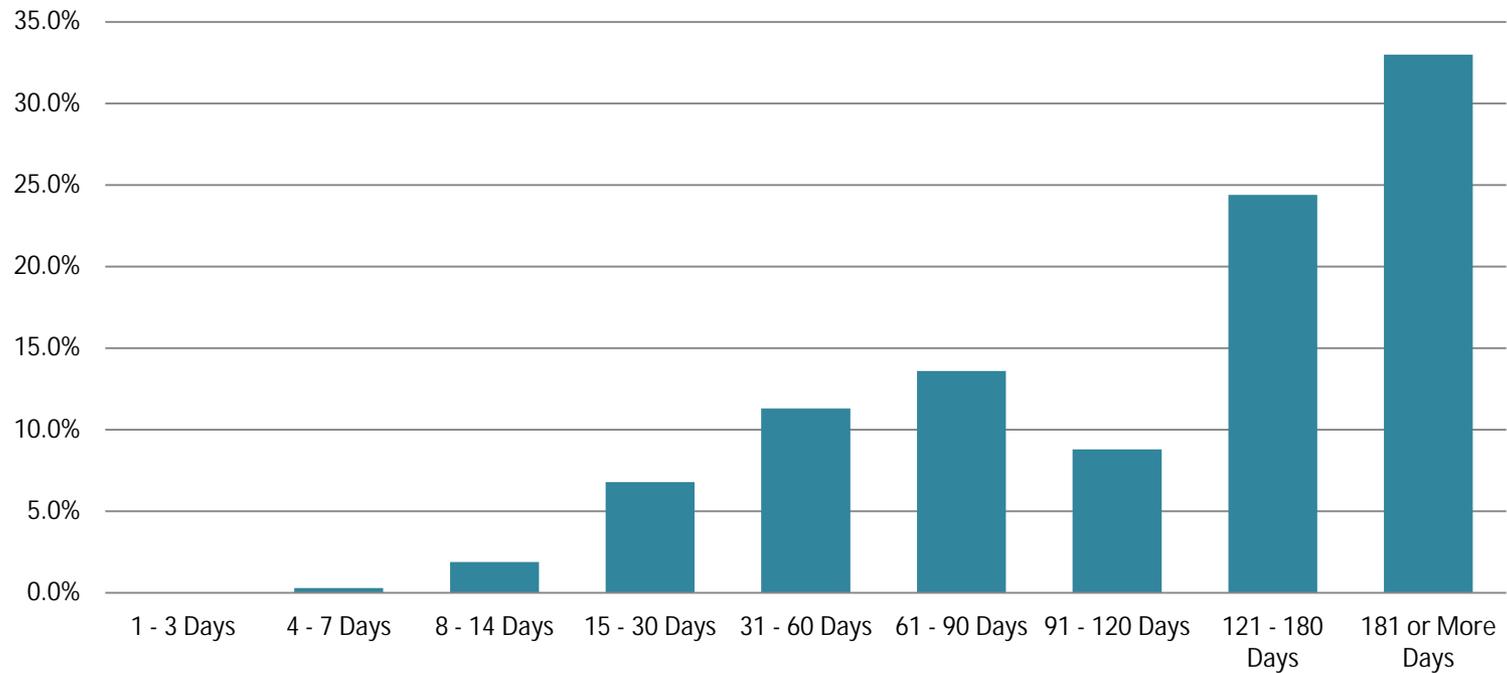
# United Kingdom

How many days prior to departure did you make the *decision* to travel?



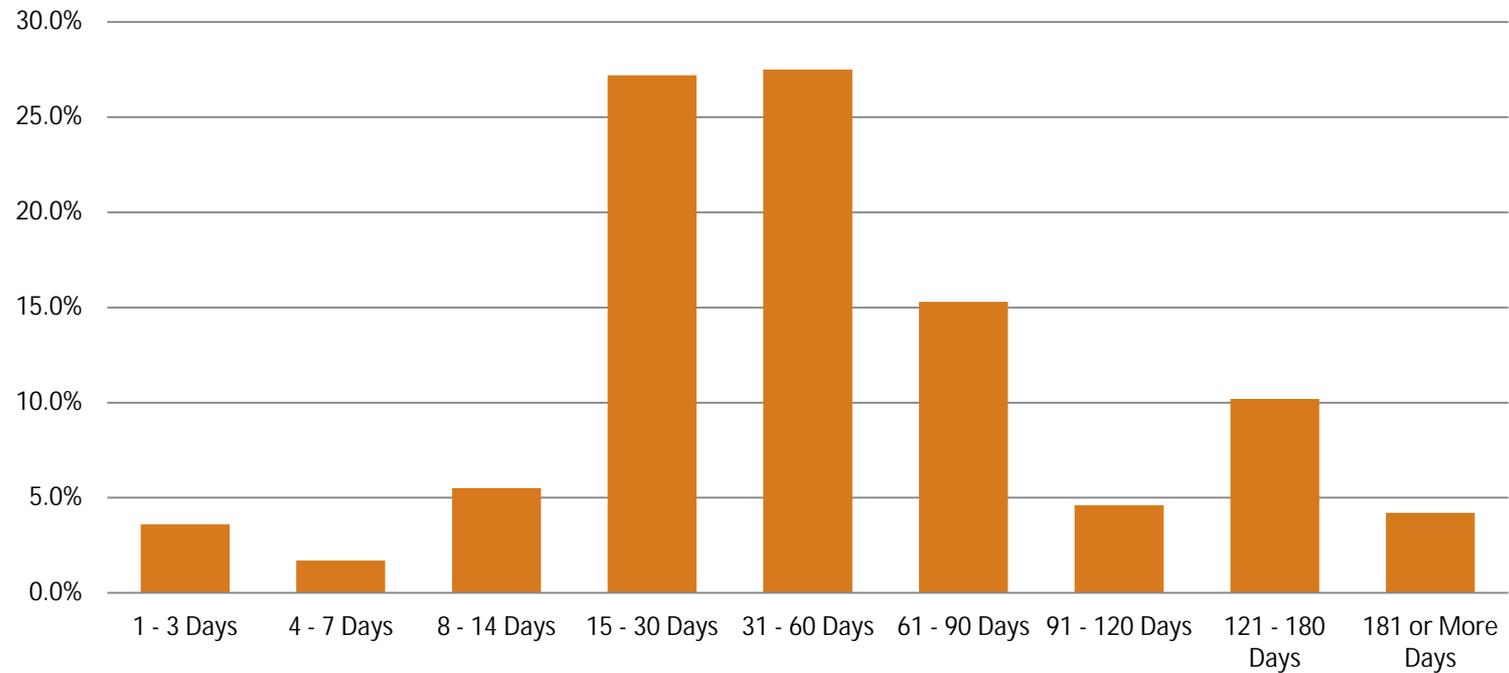
# France

How many days prior to departure did you make the *decision to travel?*

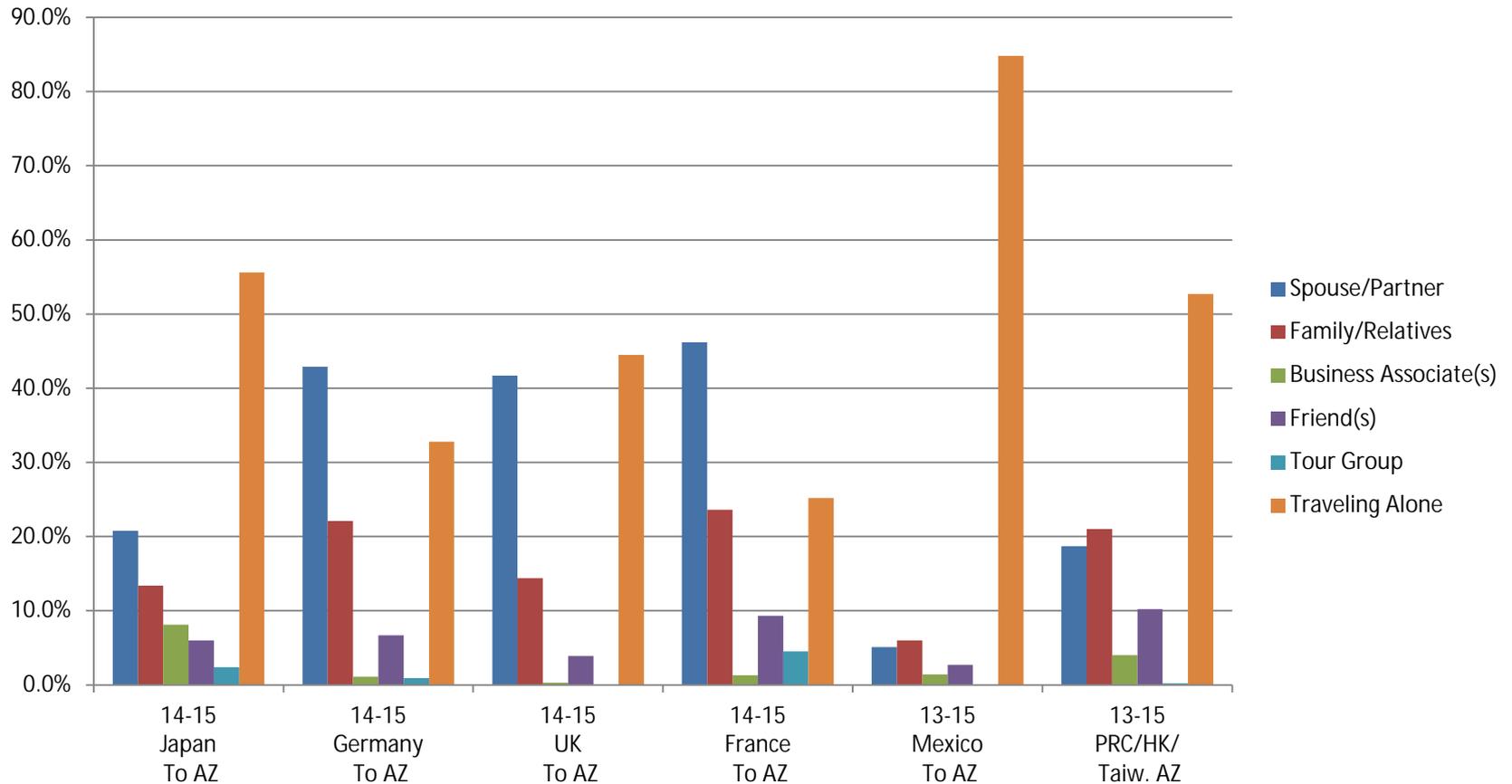


# China

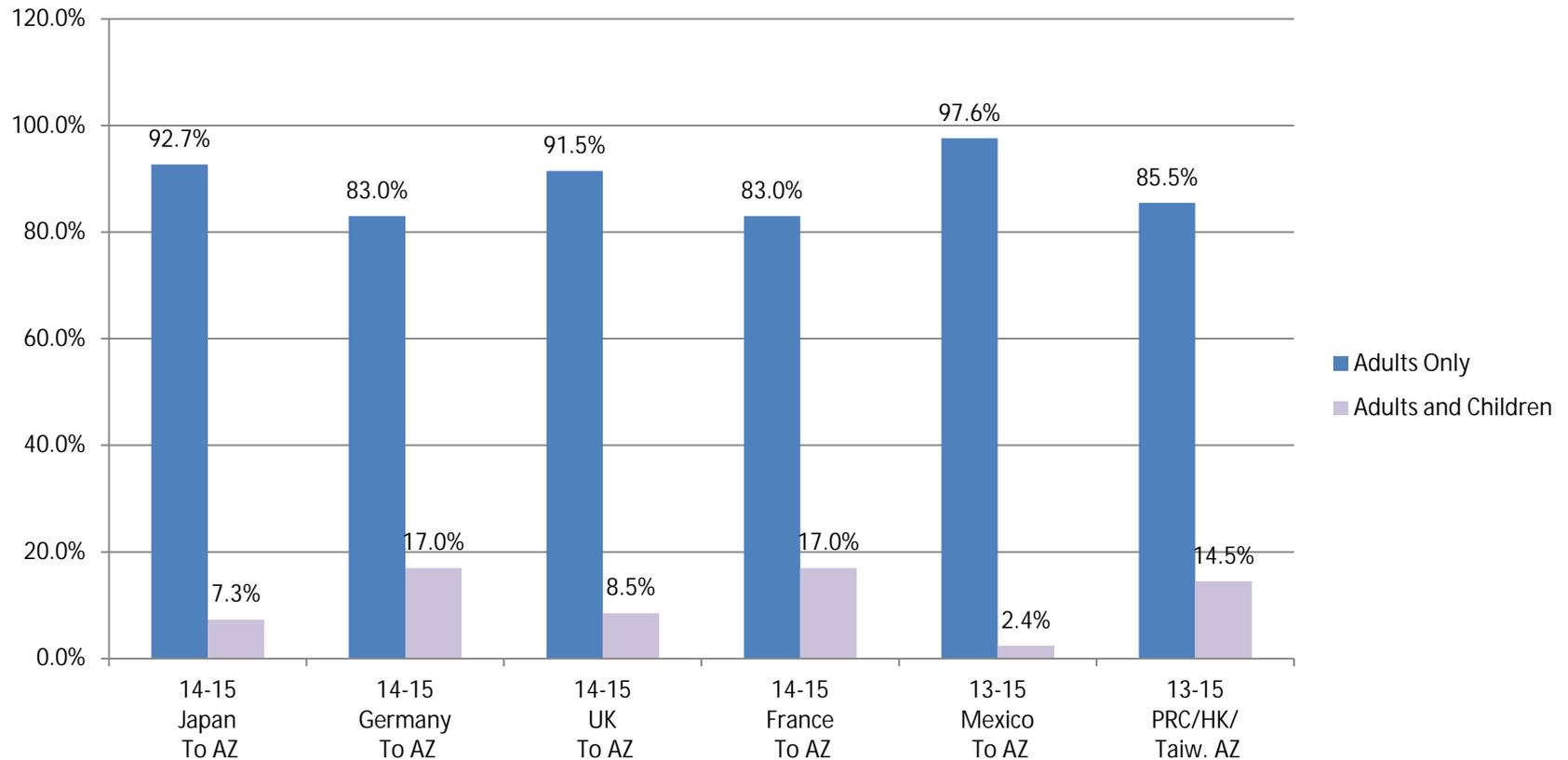
How many days prior to departure did you make the *decision* to travel?



# With whom are you traveling now?



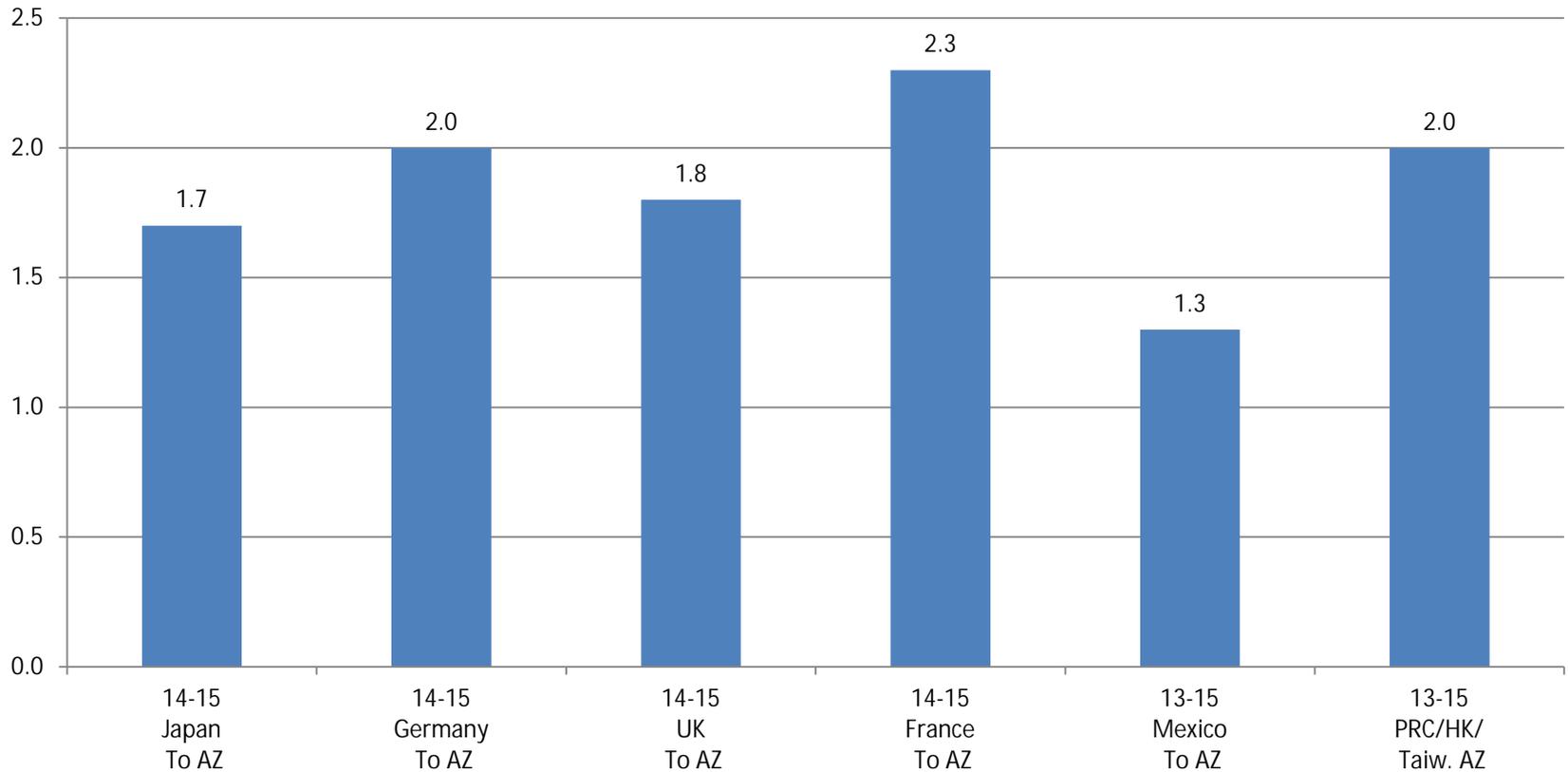
# Including yourself, how many adults and/or children are in your travel party?



Source: SIAT, 2015

\*Mexico sample includes AIR TRAVELERS ONLY

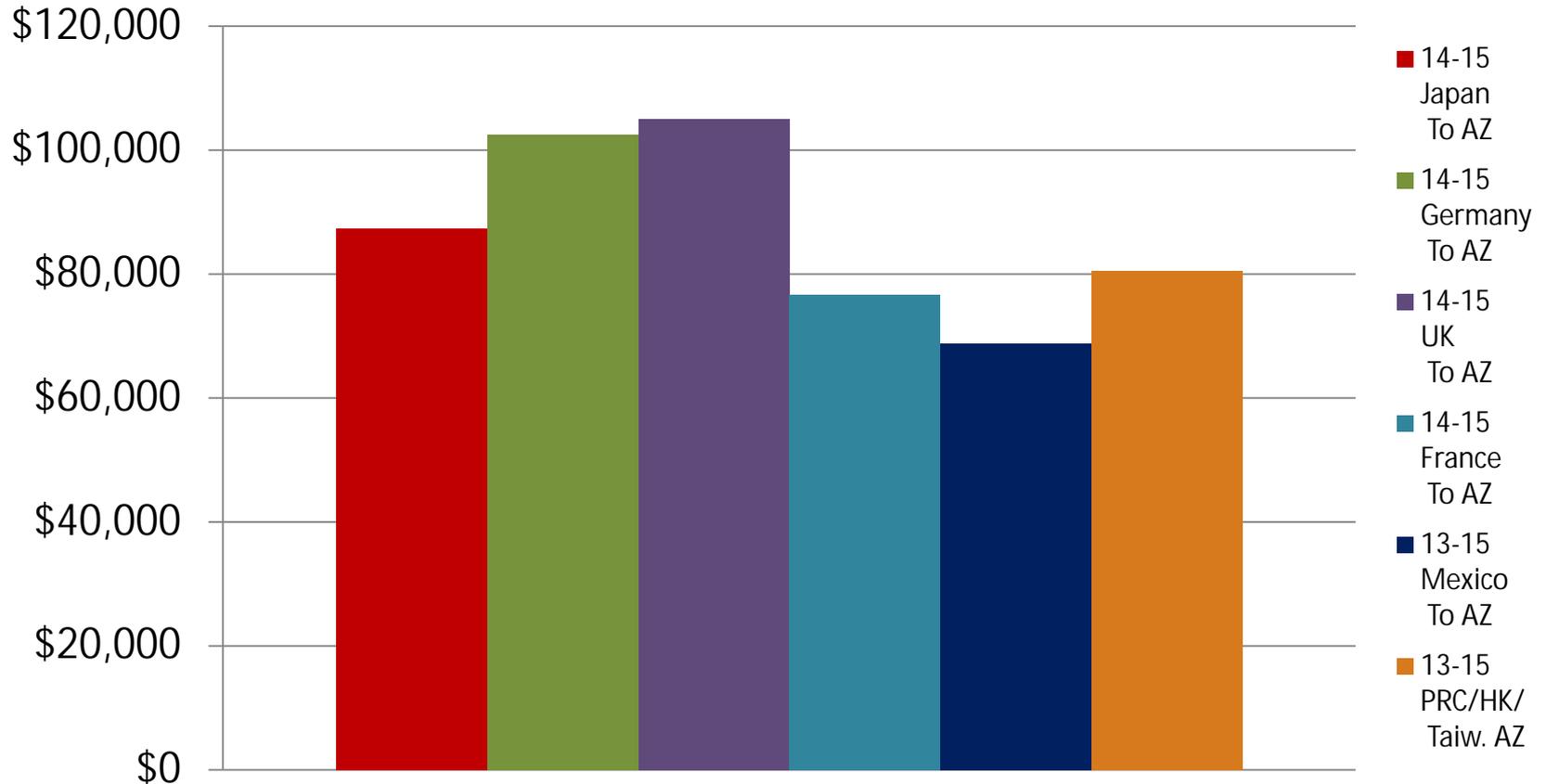
# Mean Total Party Size



Source: SIAT, 2015

\*Mexico sample includes AIR TRAVELERS ONLY

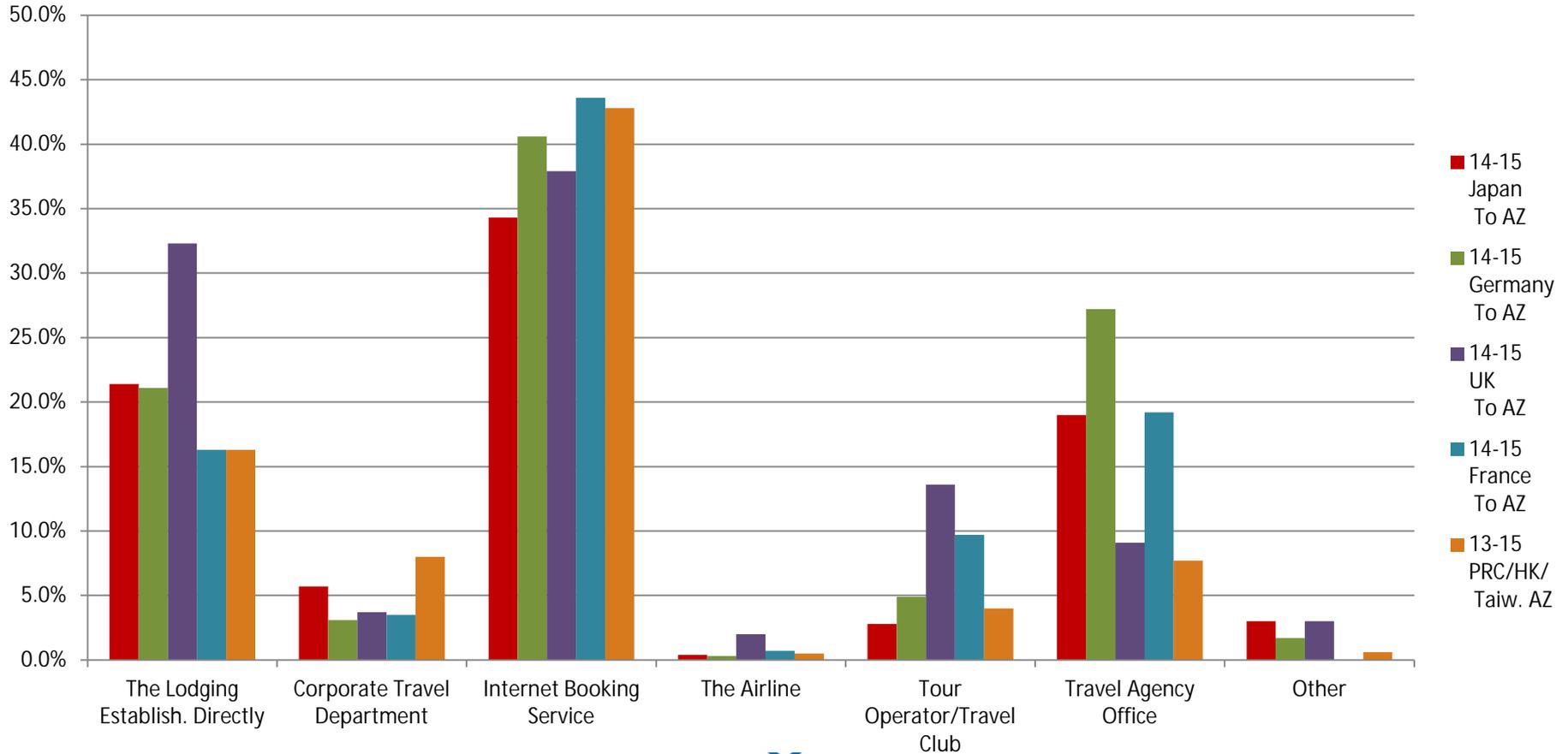
# Mean Annual Income



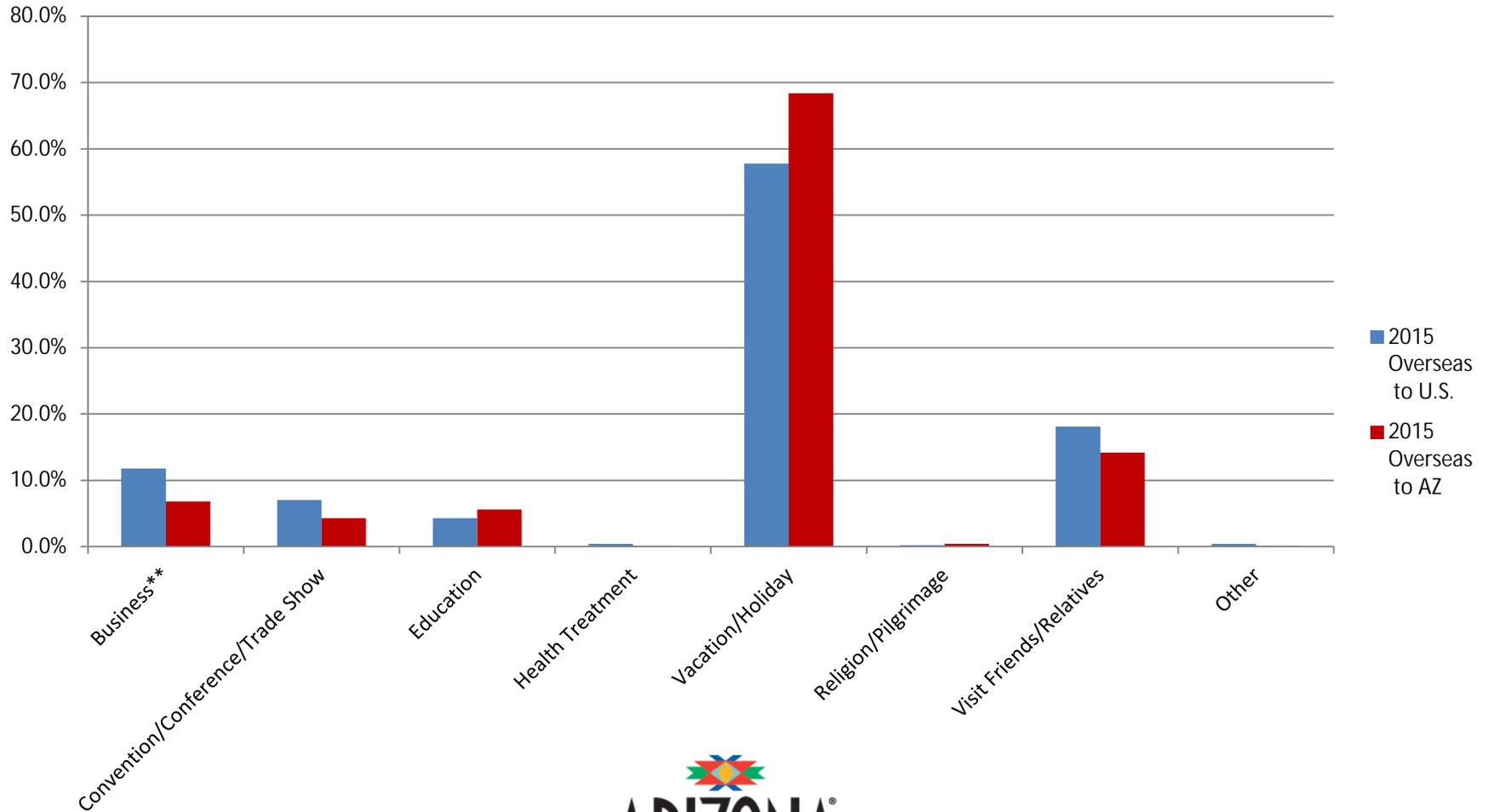
Source: SIAT, 2015

\*Mexico sample includes AIR TRAVELERS ONLY

# Before you left home, did you make reservations for lodging? If yes, how?



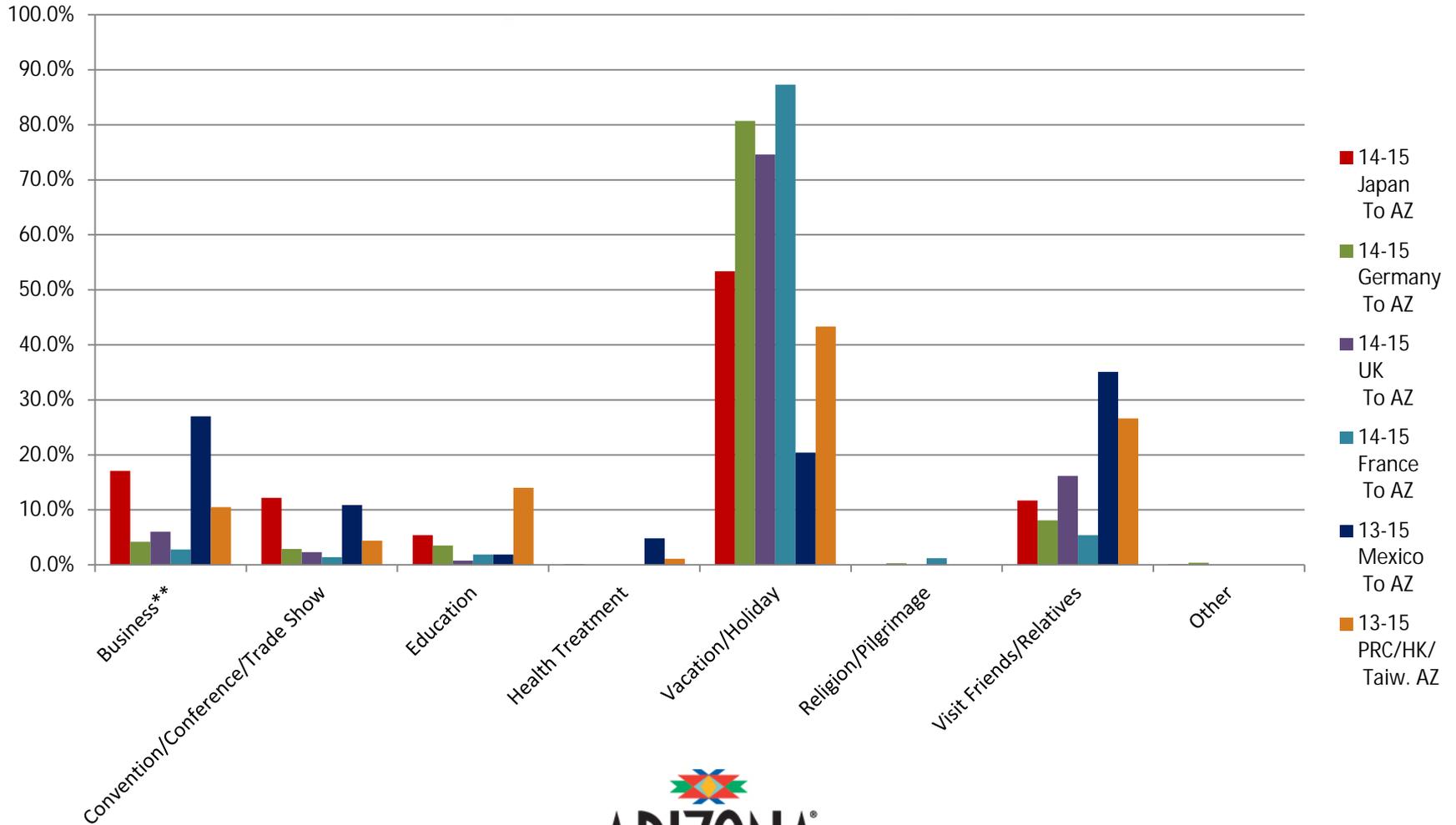
# What was the main purpose of your trip?



Source: SIAT, 2015



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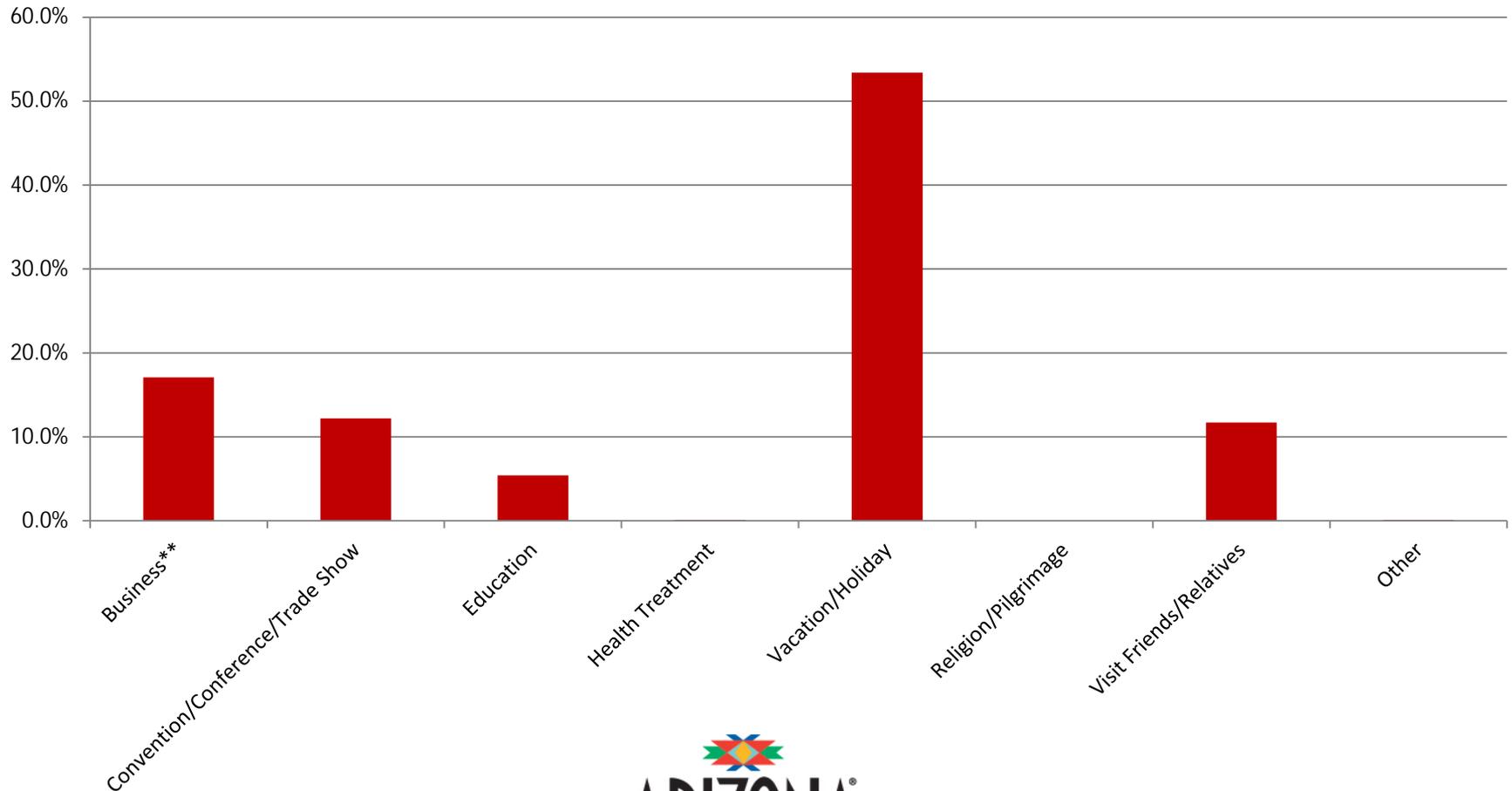
Source: SIAT, 2015



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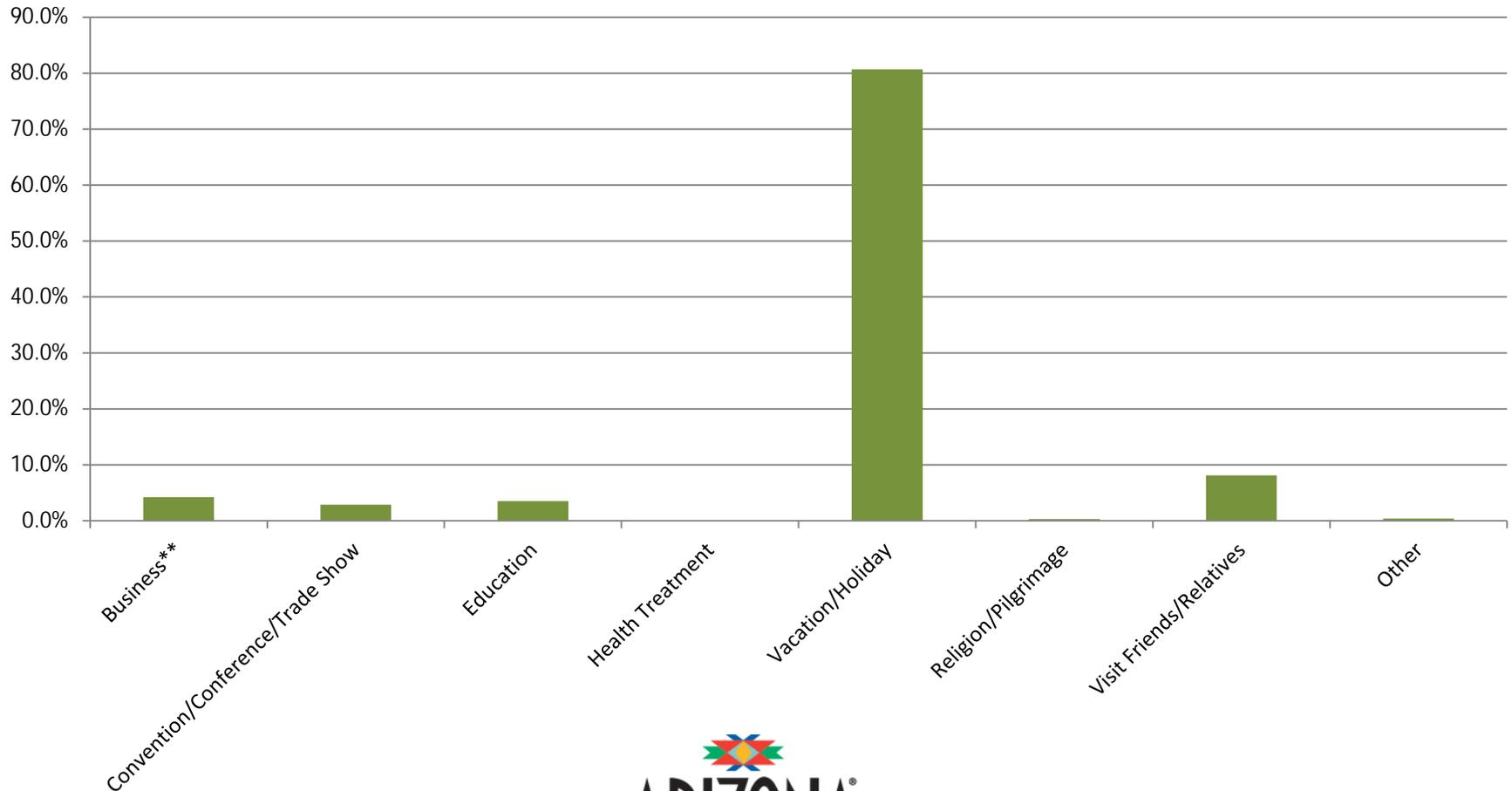
# What was the main purpose of your trip?

Japan To AZ



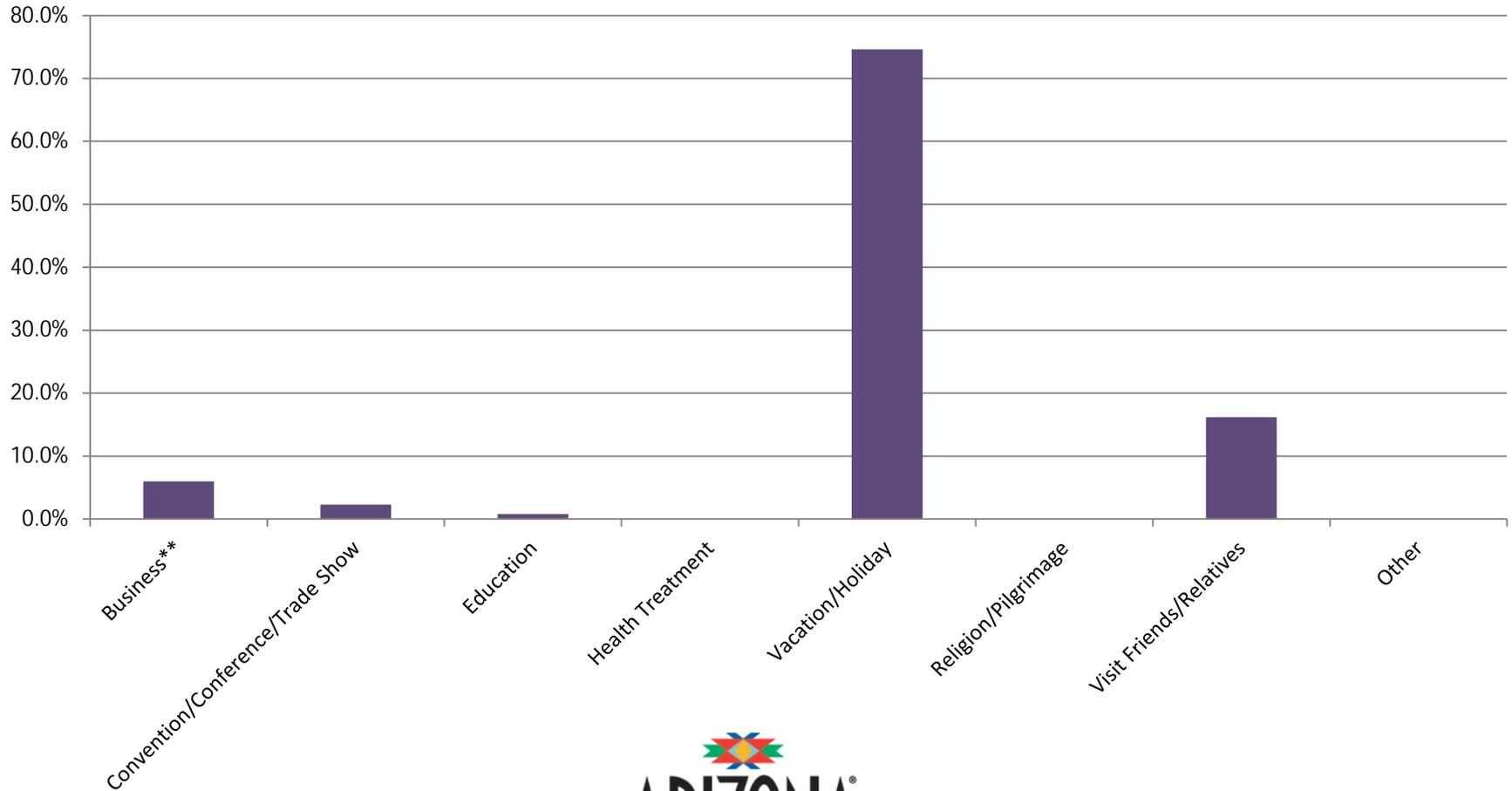
# What was the main purpose of your trip?

## Germany To AZ



# What was the main purpose of your trip?

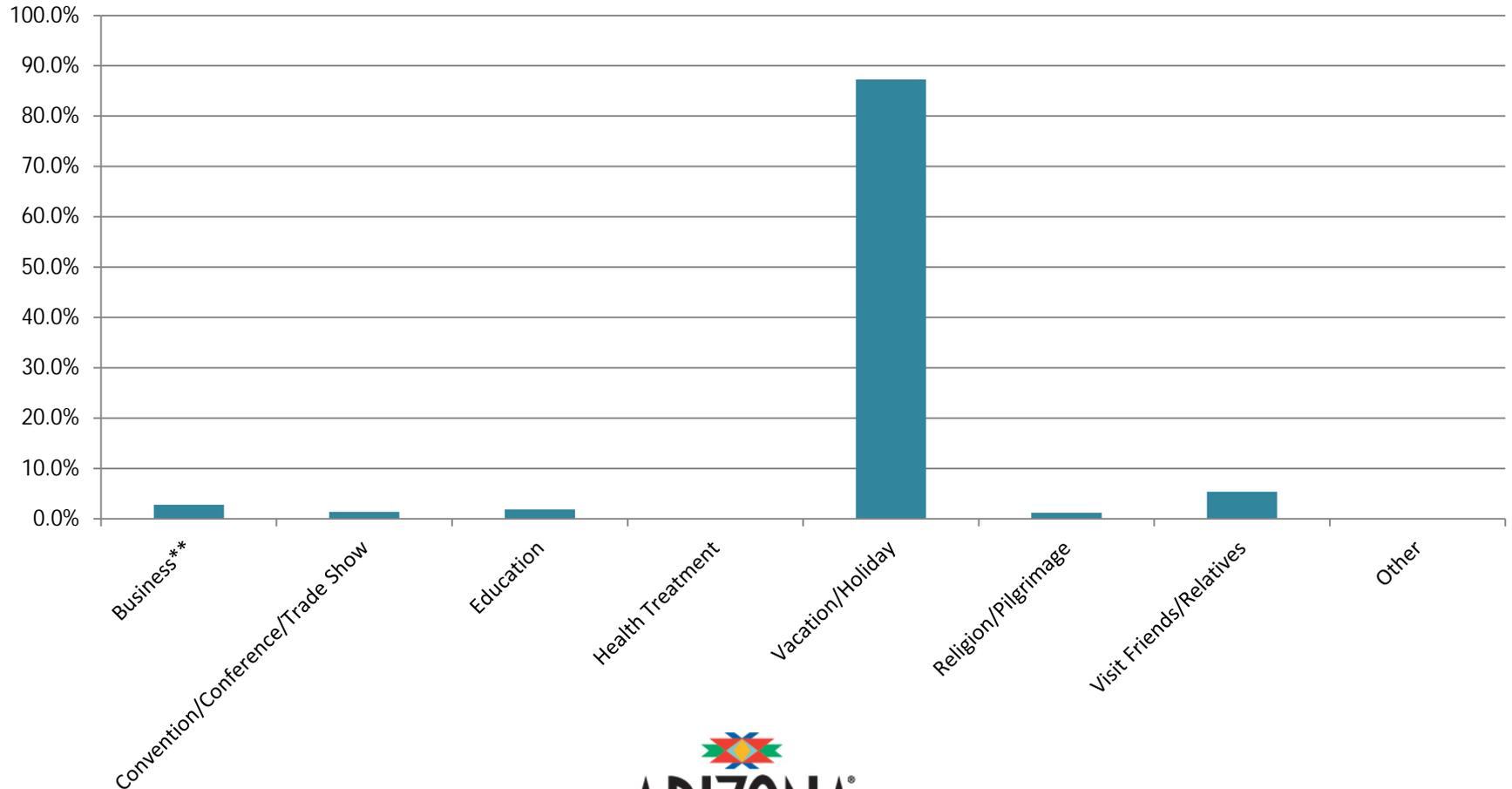
UK To AZ



Source: SIAT, 2015

# What was the main purpose of your trip?

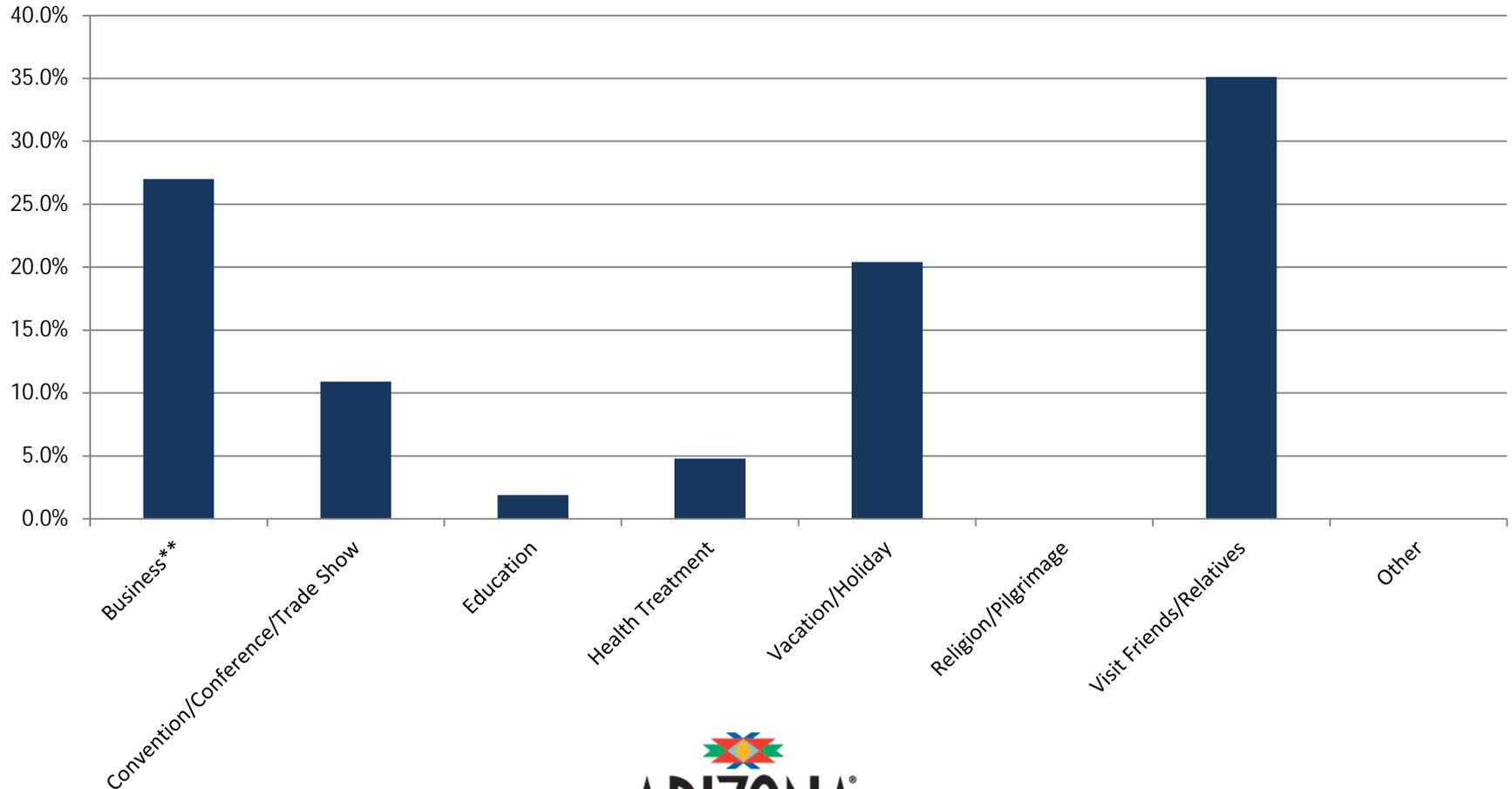
France To AZ



Source: SIAT, 2015

# What was the main purpose of your trip?

## Mexico Air Travelers To AZ

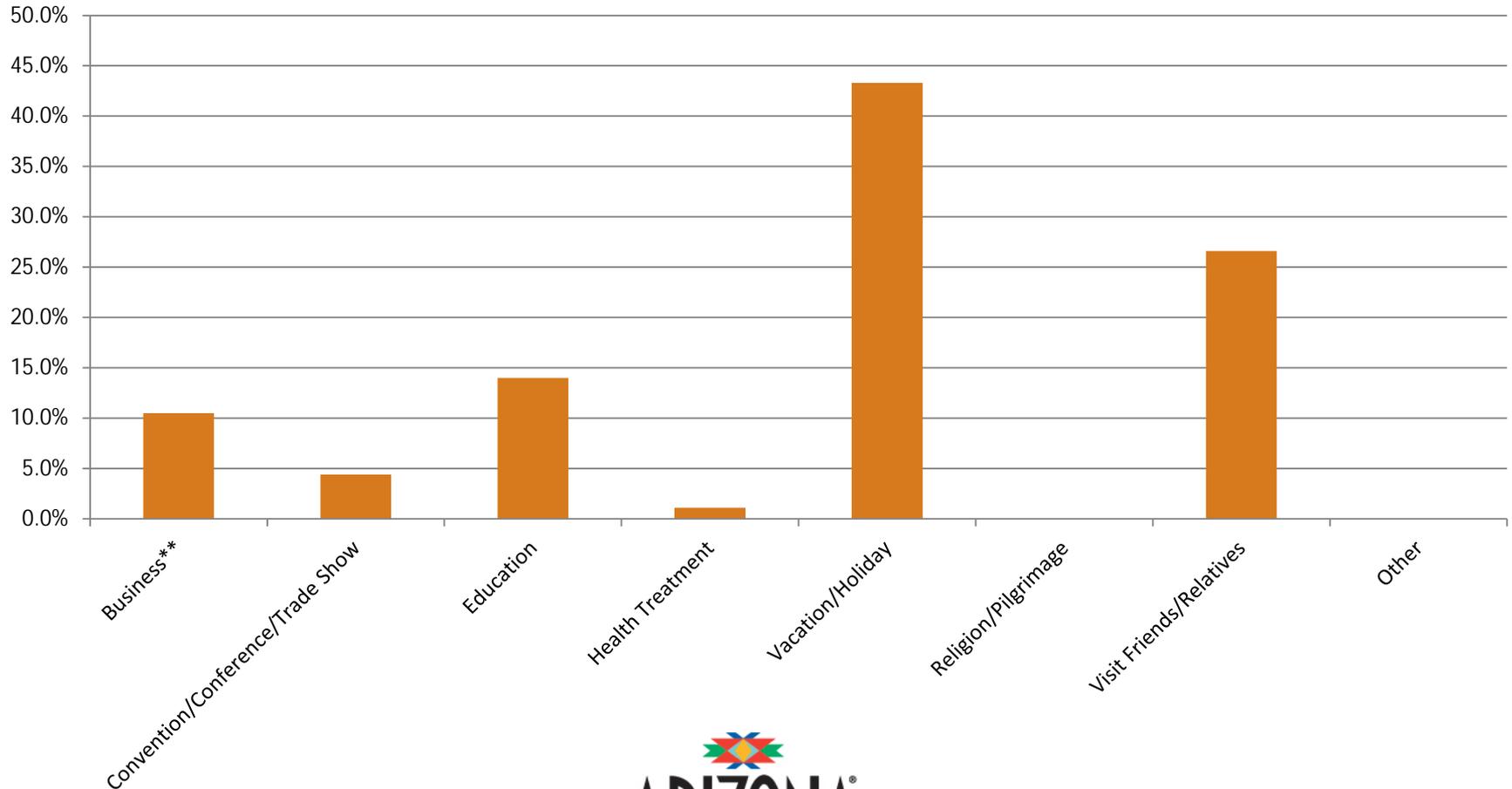


Source: SIAT, 2015

\*Mexico sample includes AIR TRAVELERS ONLY

# What was the main purpose of your trip?

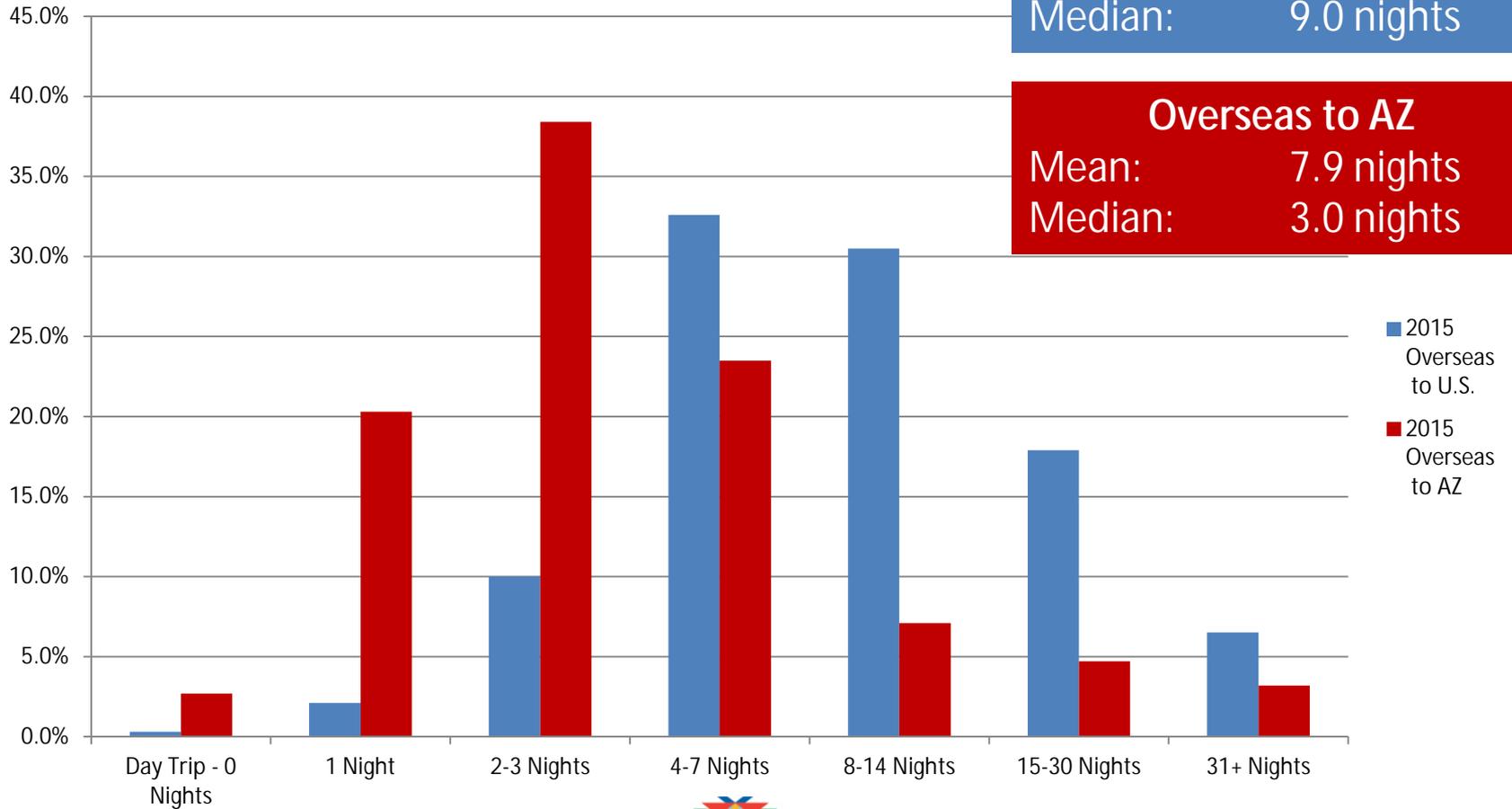
China/Hong Kong/Taiwan To AZ



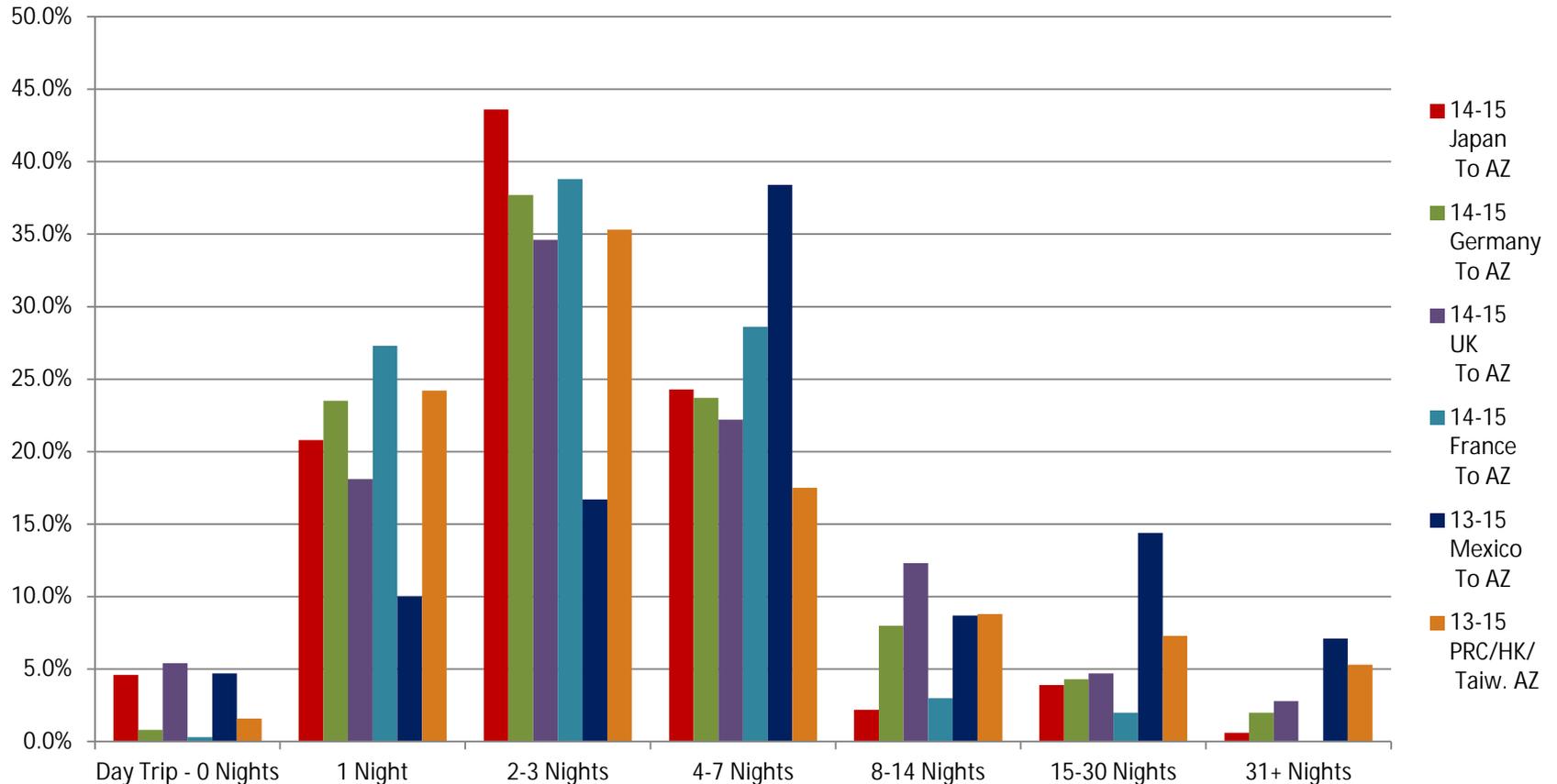
# Overall nights in destination

**Overseas to US**  
 Mean: 14.9 nights  
 Median: 9.0 nights

**Overseas to AZ**  
 Mean: 7.9 nights  
 Median: 3.0 nights

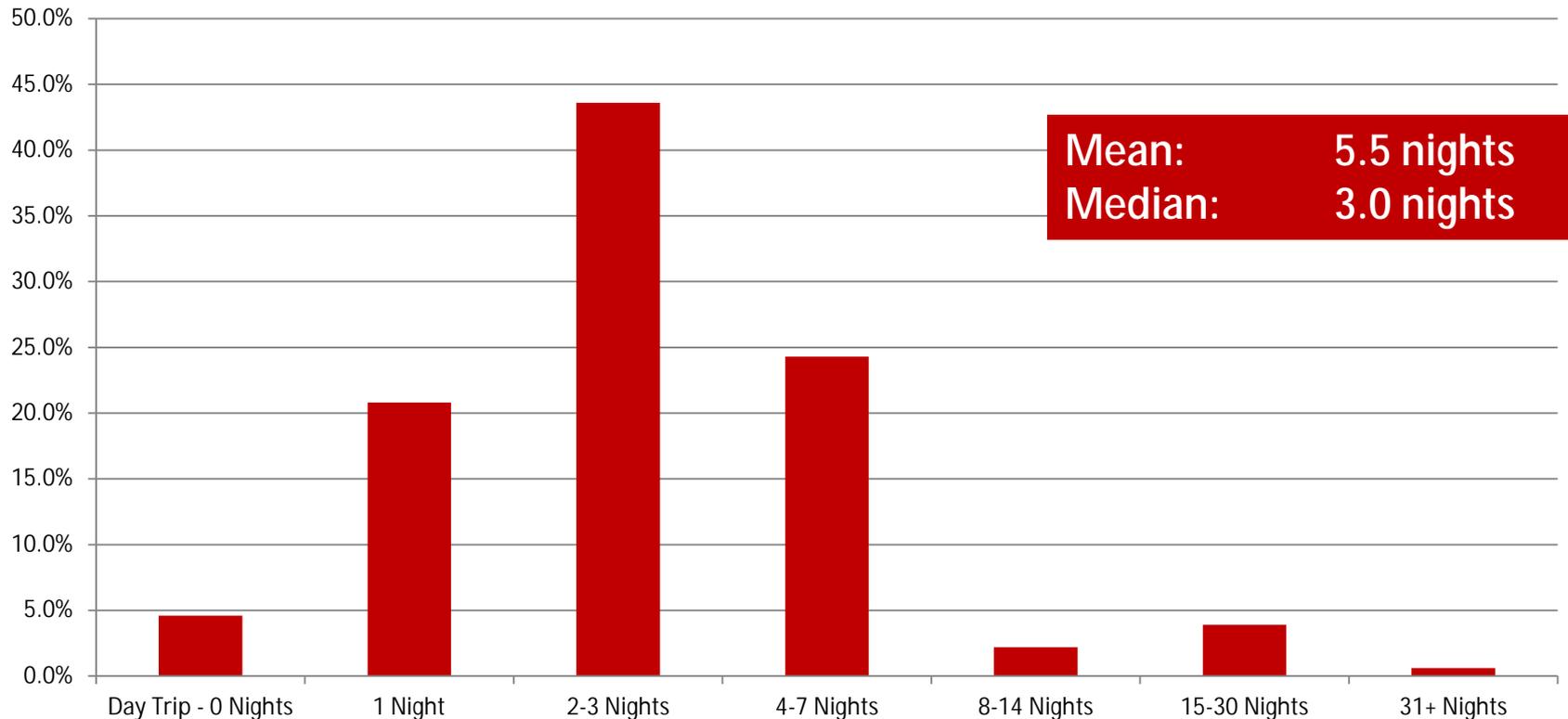


# Overall nights in destination



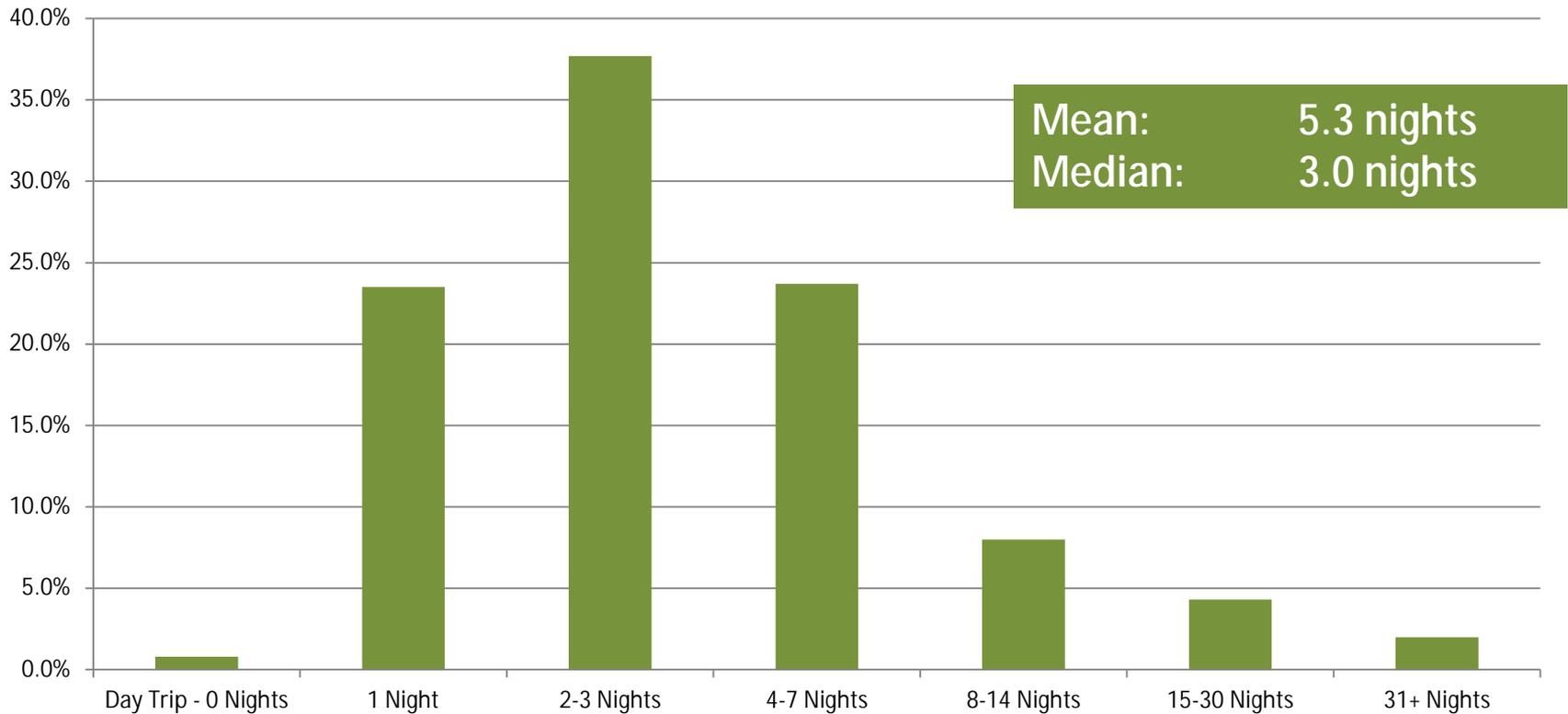
# Overall nights in destination

## Japan To AZ



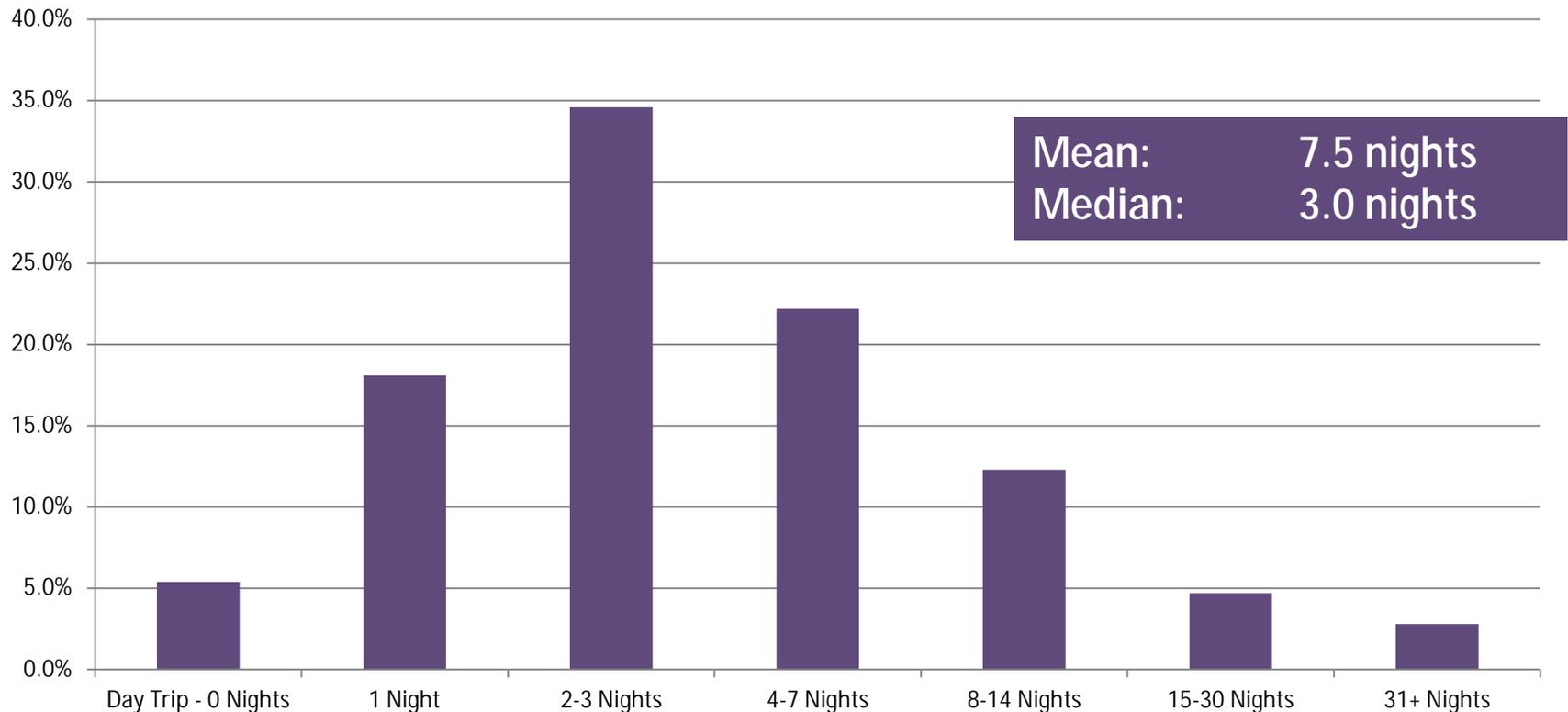
# Overall nights in destination

## Germany To AZ



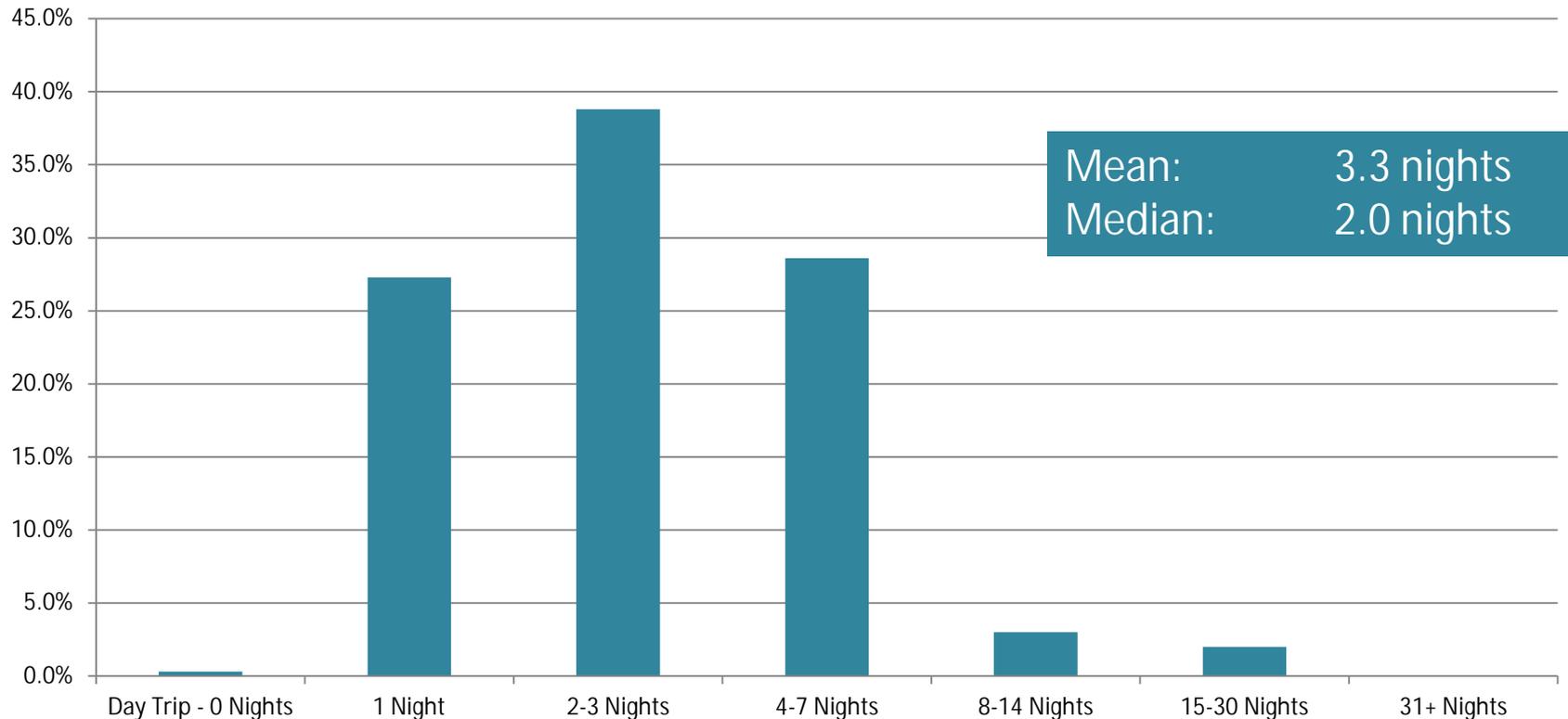
# Overall nights in destination

## UK To AZ



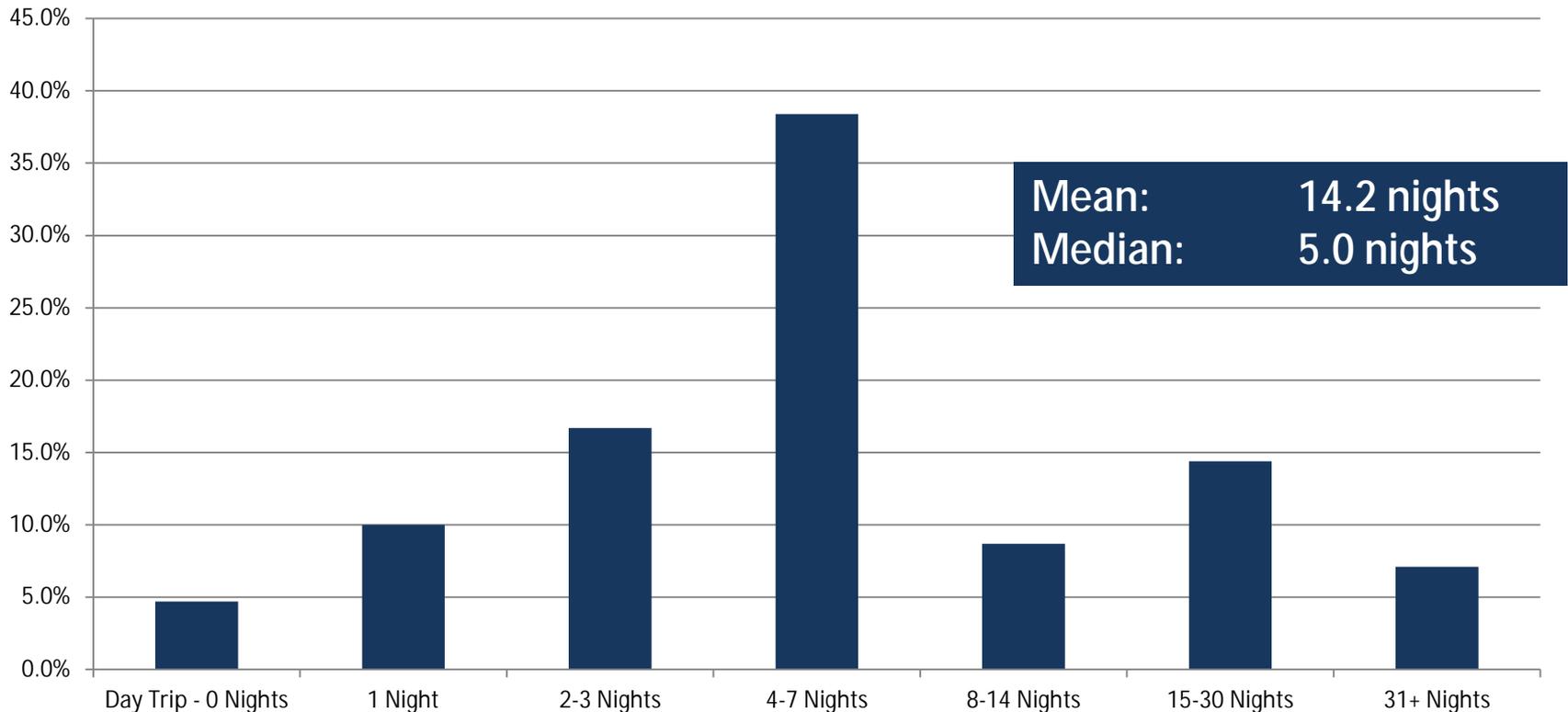
# Overall nights in destination

## France To AZ



# Overall nights in destination

## Mexico Air Travelers To AZ



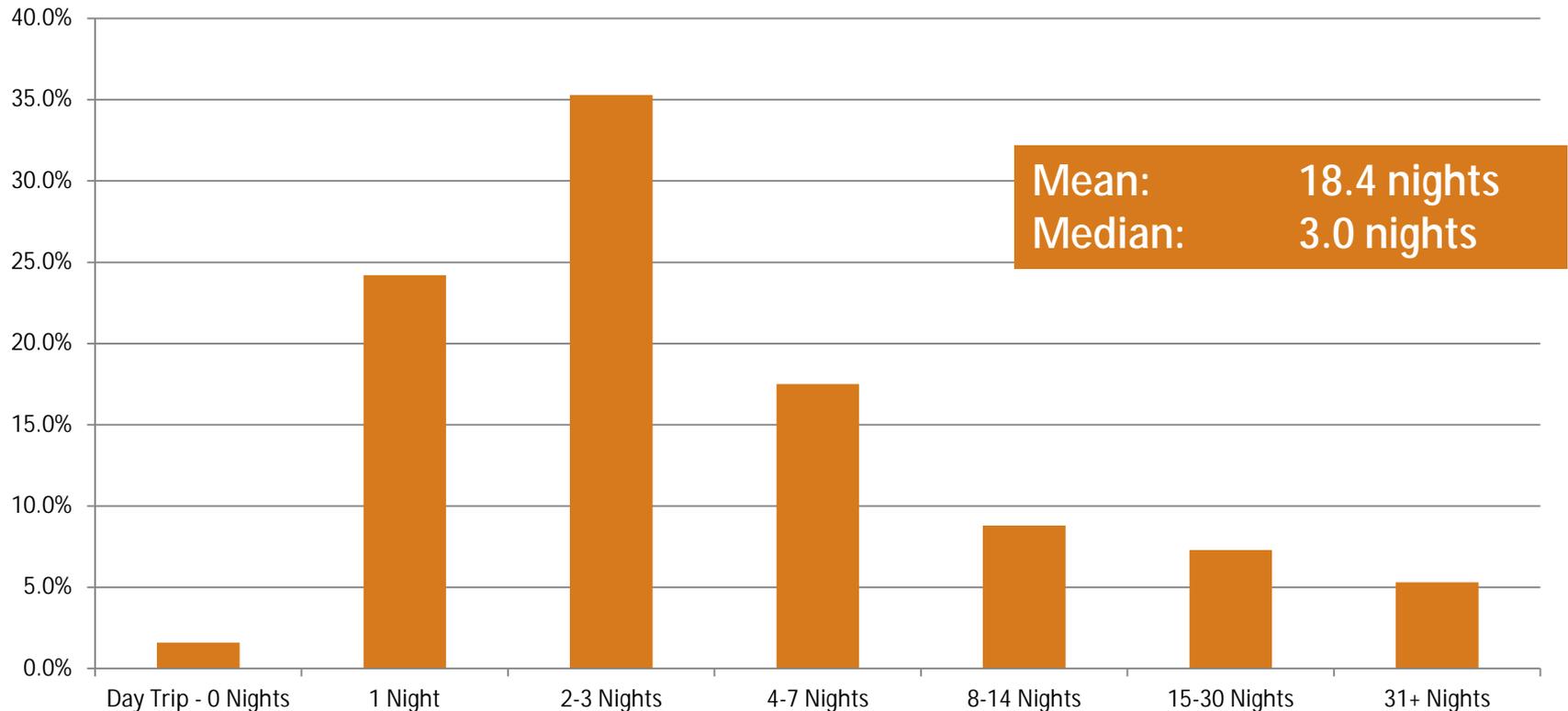
Source: SIAT, 2015



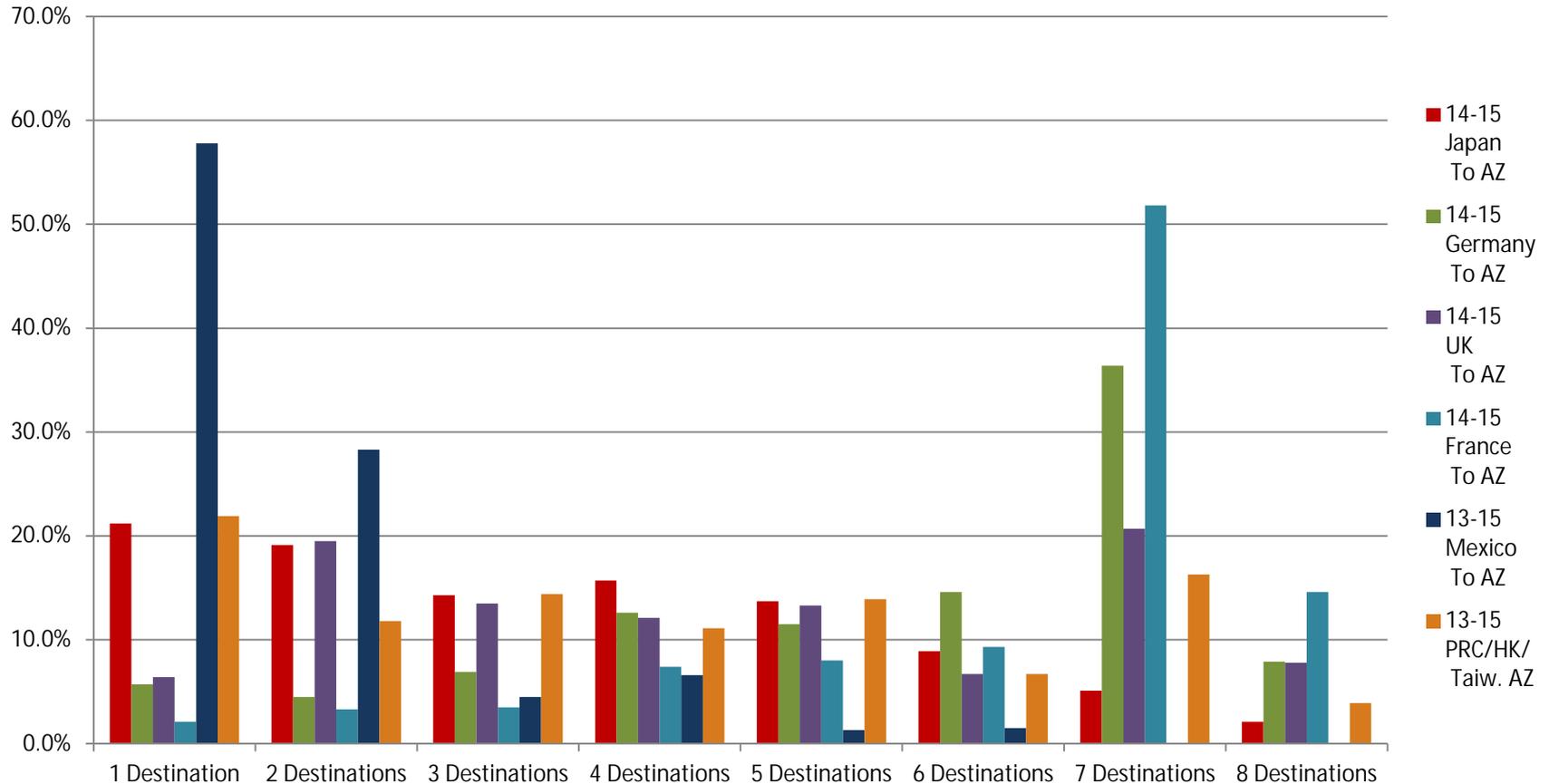
\*Mexico sample includes AIR TRAVELERS ONLY

# Overall nights in destination

## China/Hong Kong/Taiwan To AZ



# Number of Destinations Visited

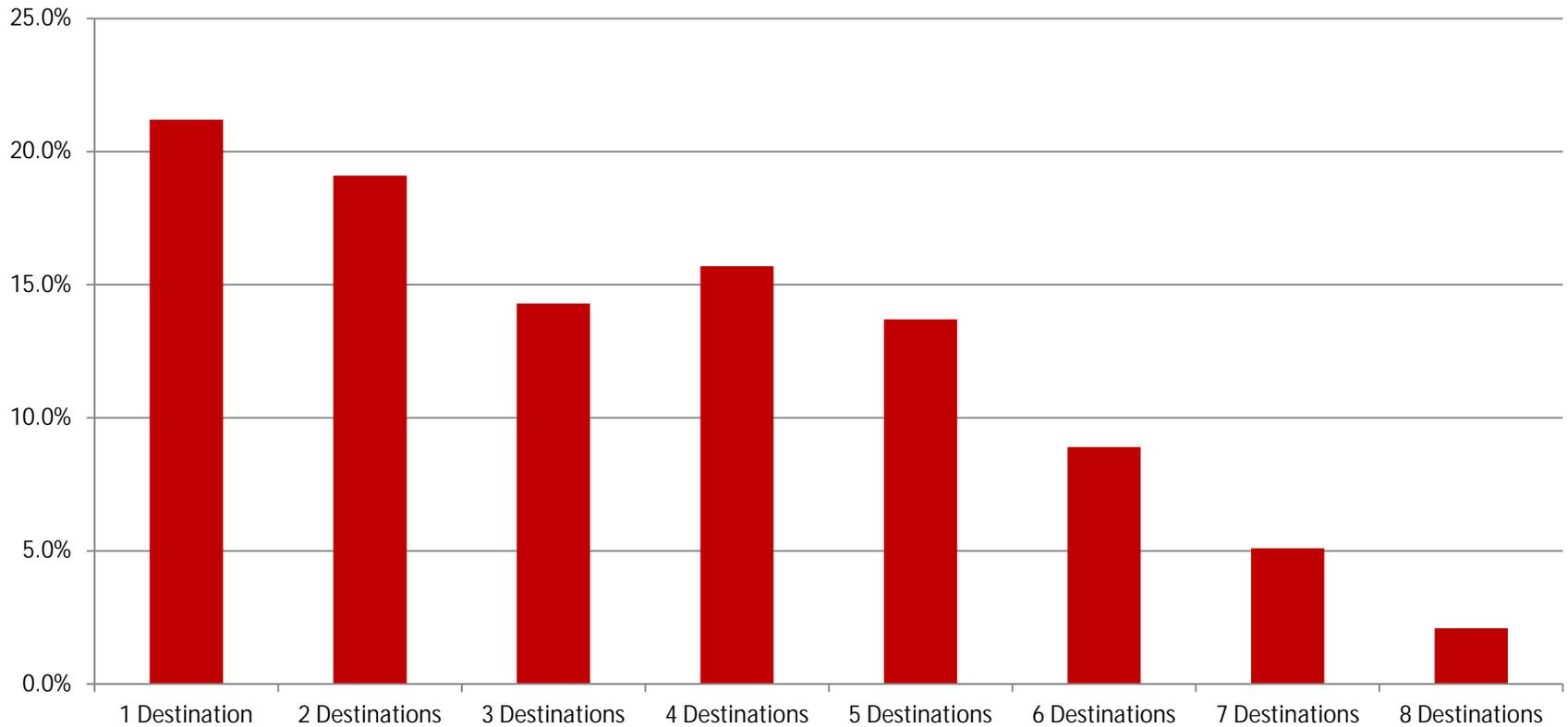


Source: SIAT, 2015

\*Mexico sample includes AIR TRAVELERS ONLY

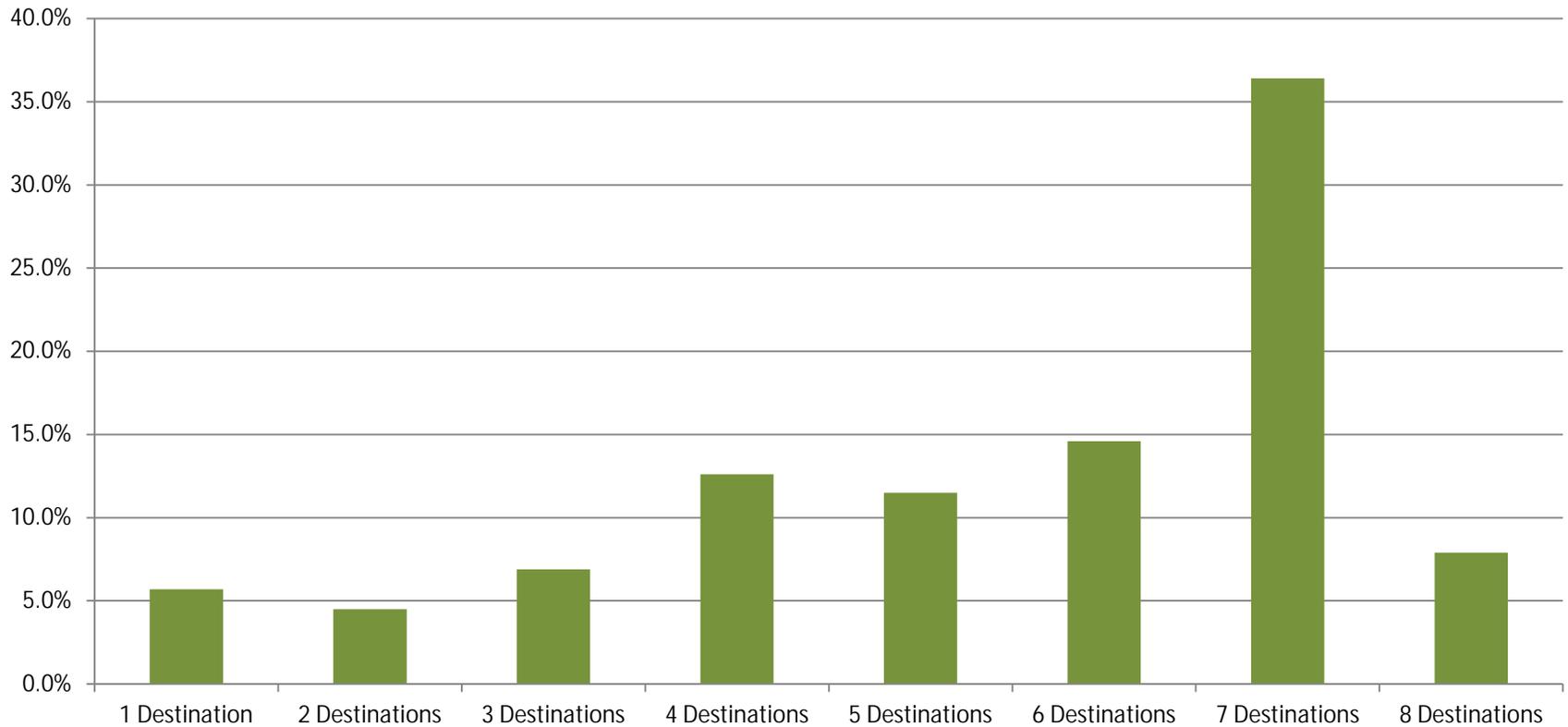
# Number of Destinations Visited

## Japan To AZ



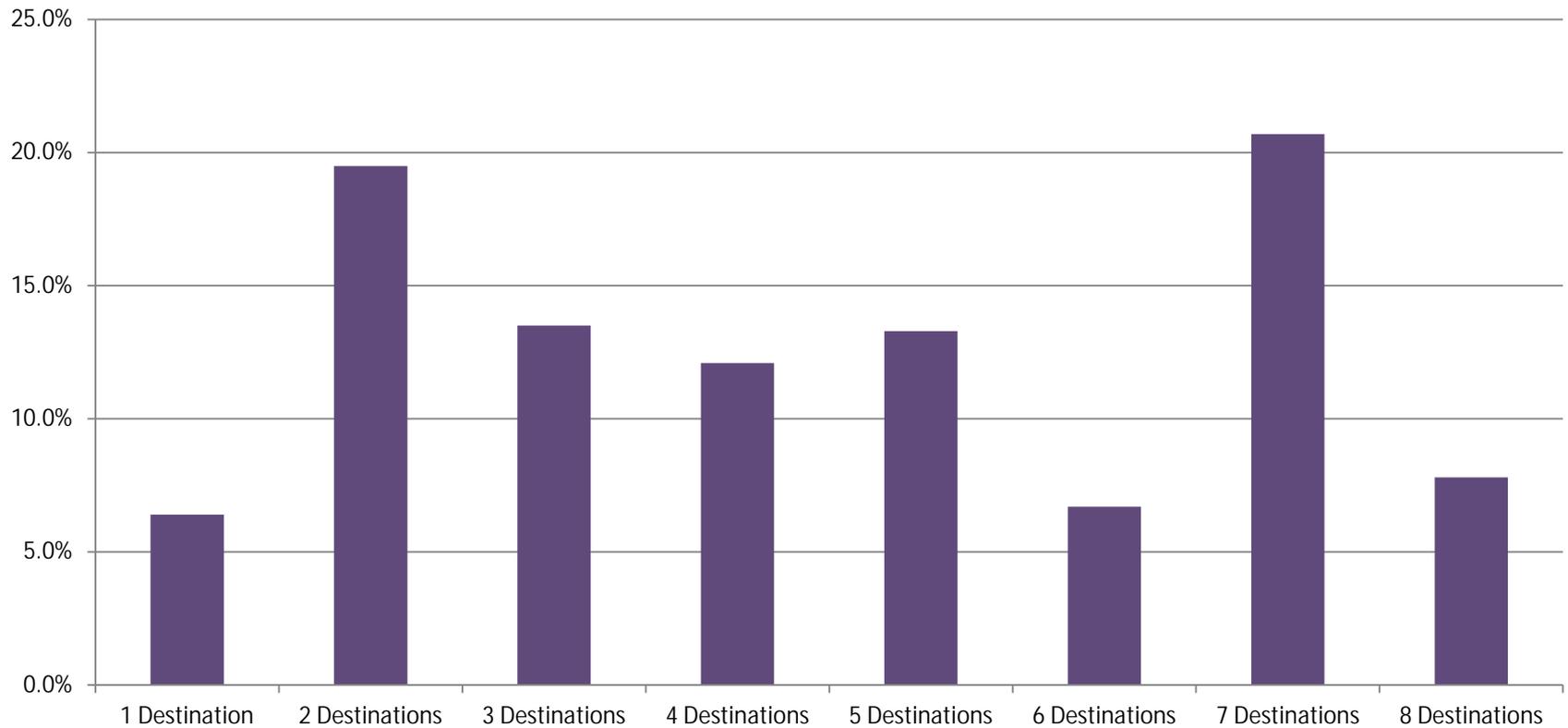
# Number of Destinations Visited

## Germany To AZ



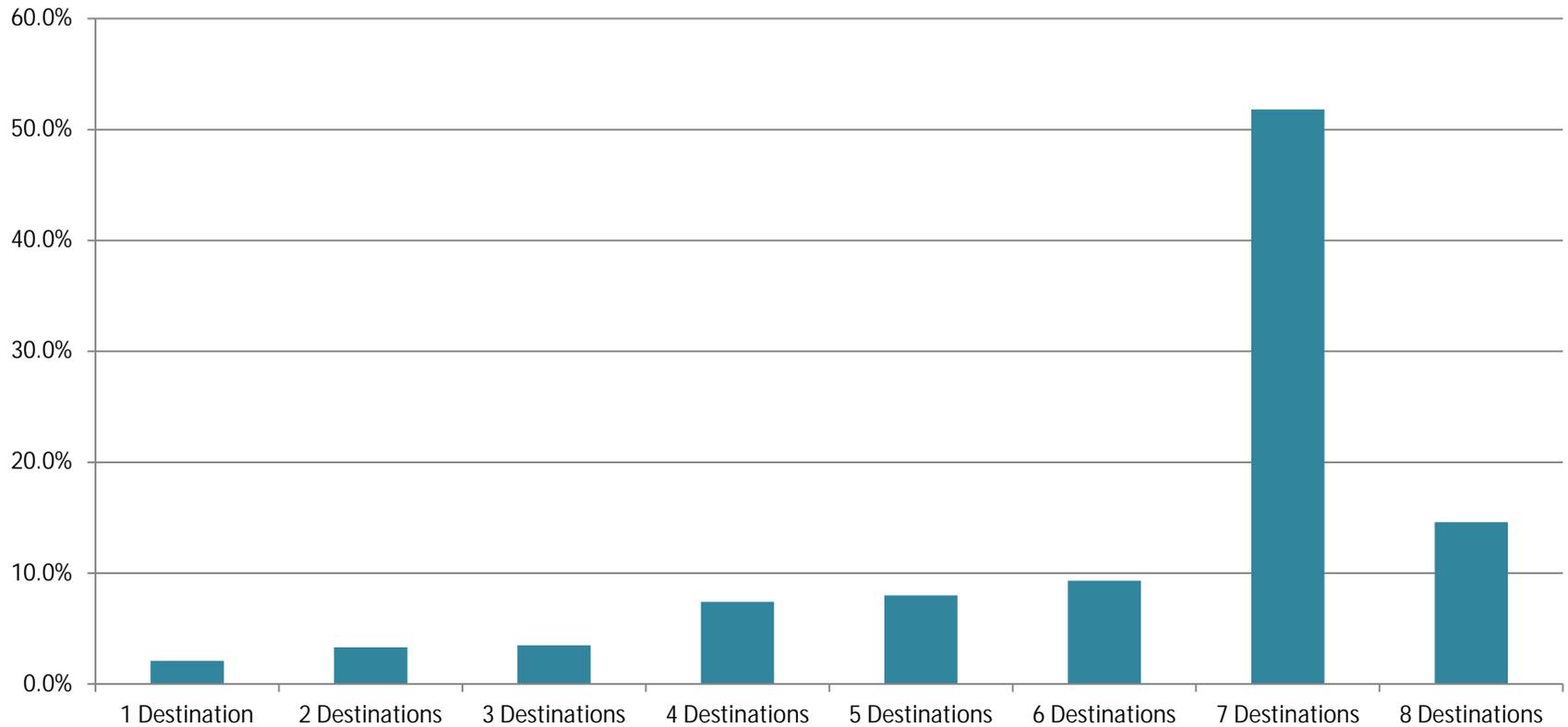
# Number of Destinations Visited

## UK To AZ



# Number of Destinations Visited

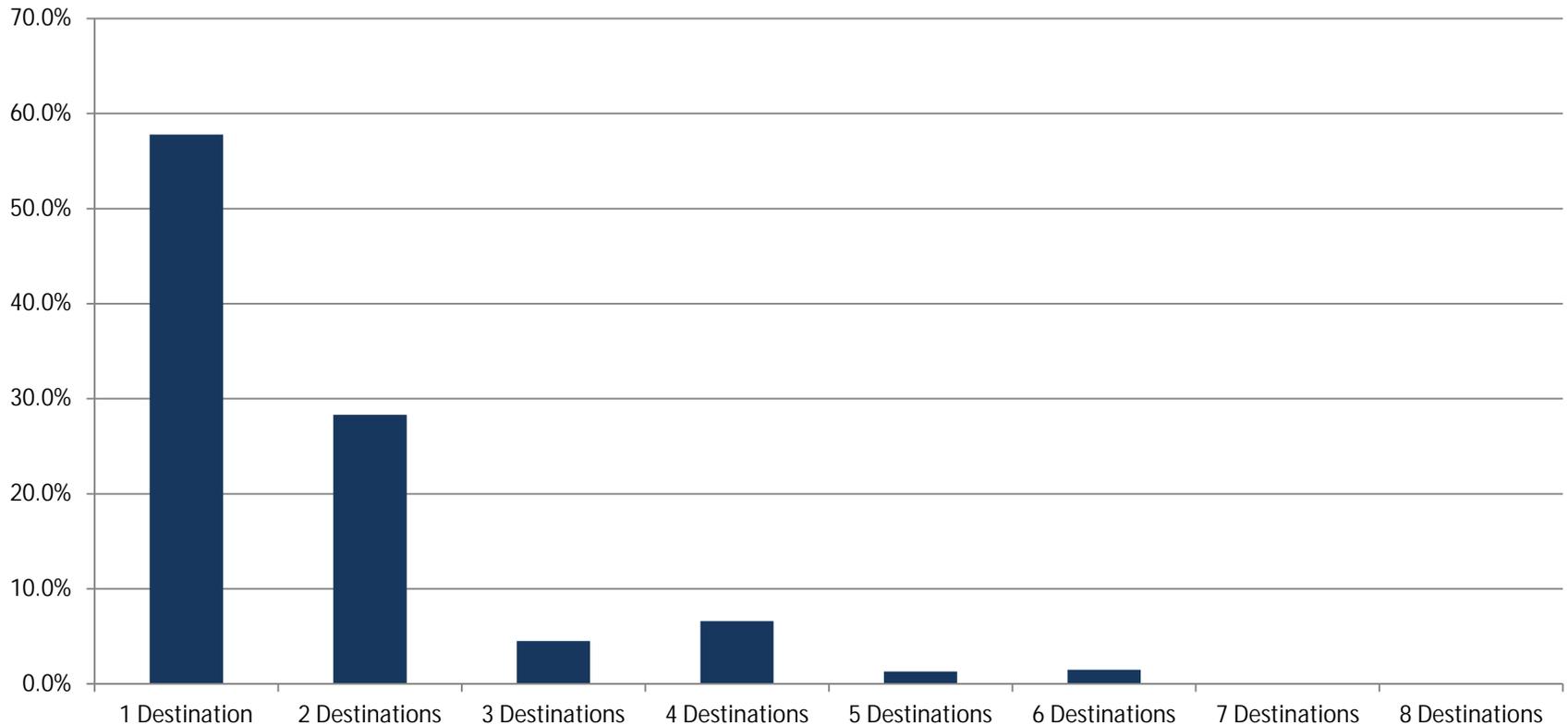
## France To AZ



Source: SIAT, 2015

# Number of Destinations Visited

## Mexico To AZ

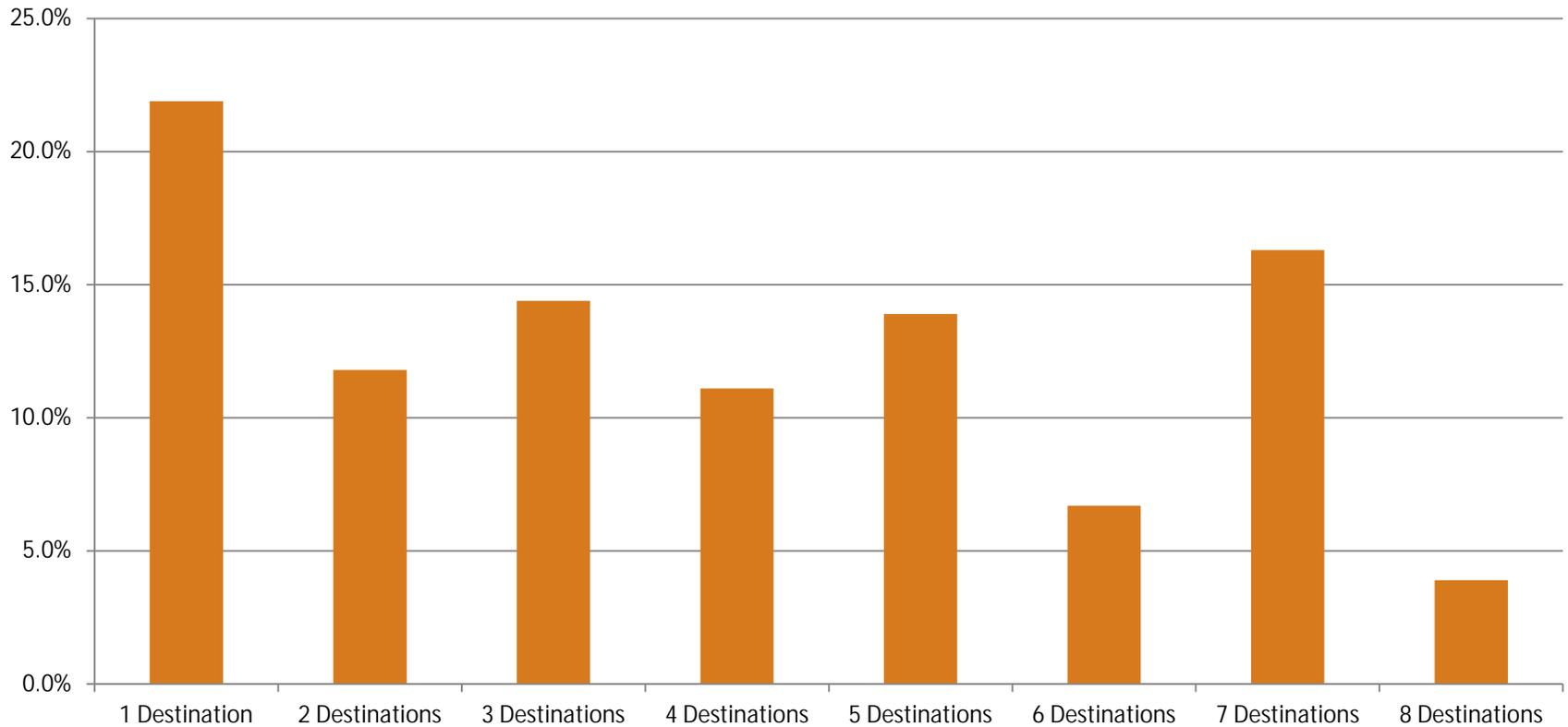


Source: SIAT, 2015

\*Mexico sample includes AIR TRAVELERS ONLY

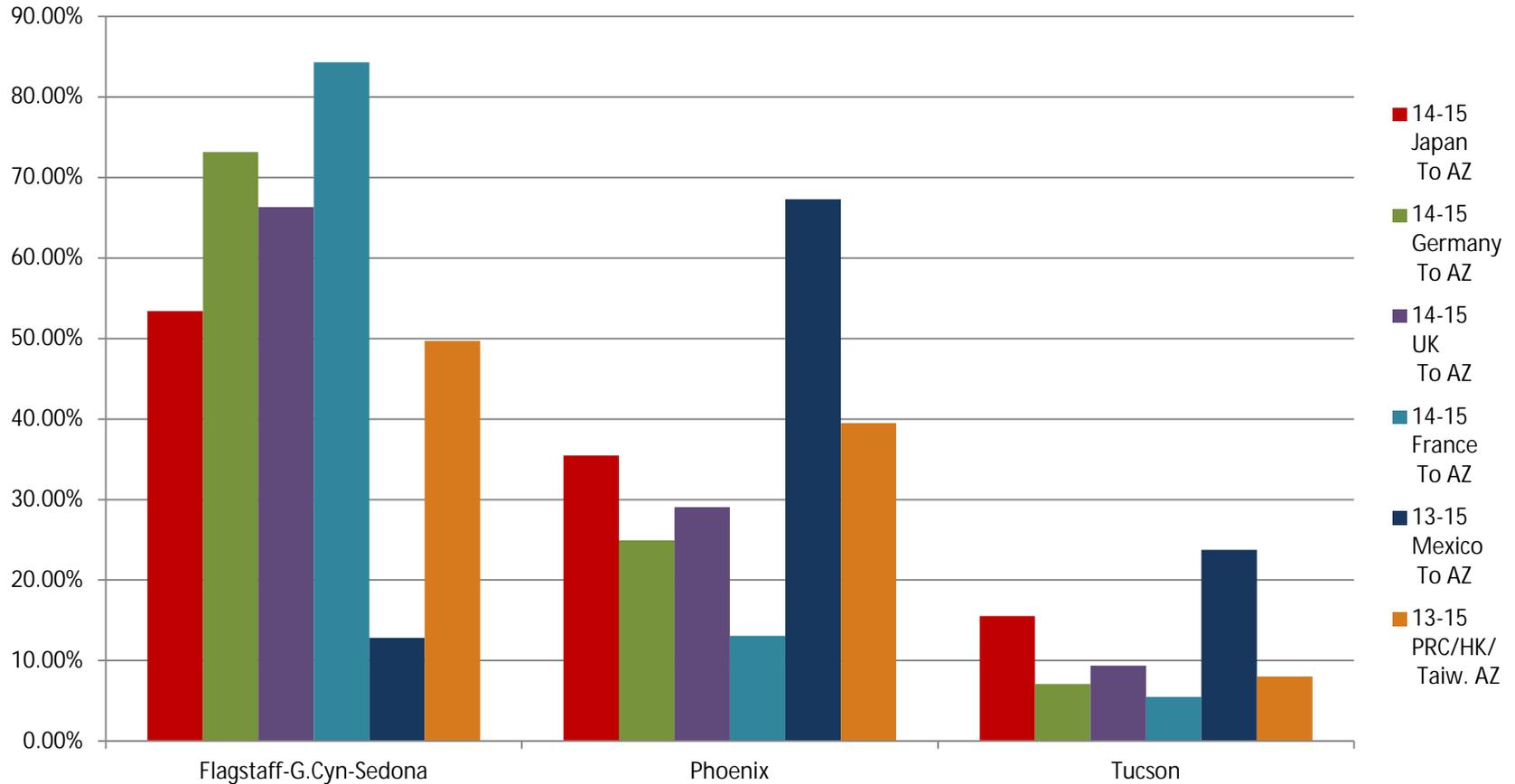
# Number of Destinations Visited

## China/Hong Kong/Taiwan To AZ



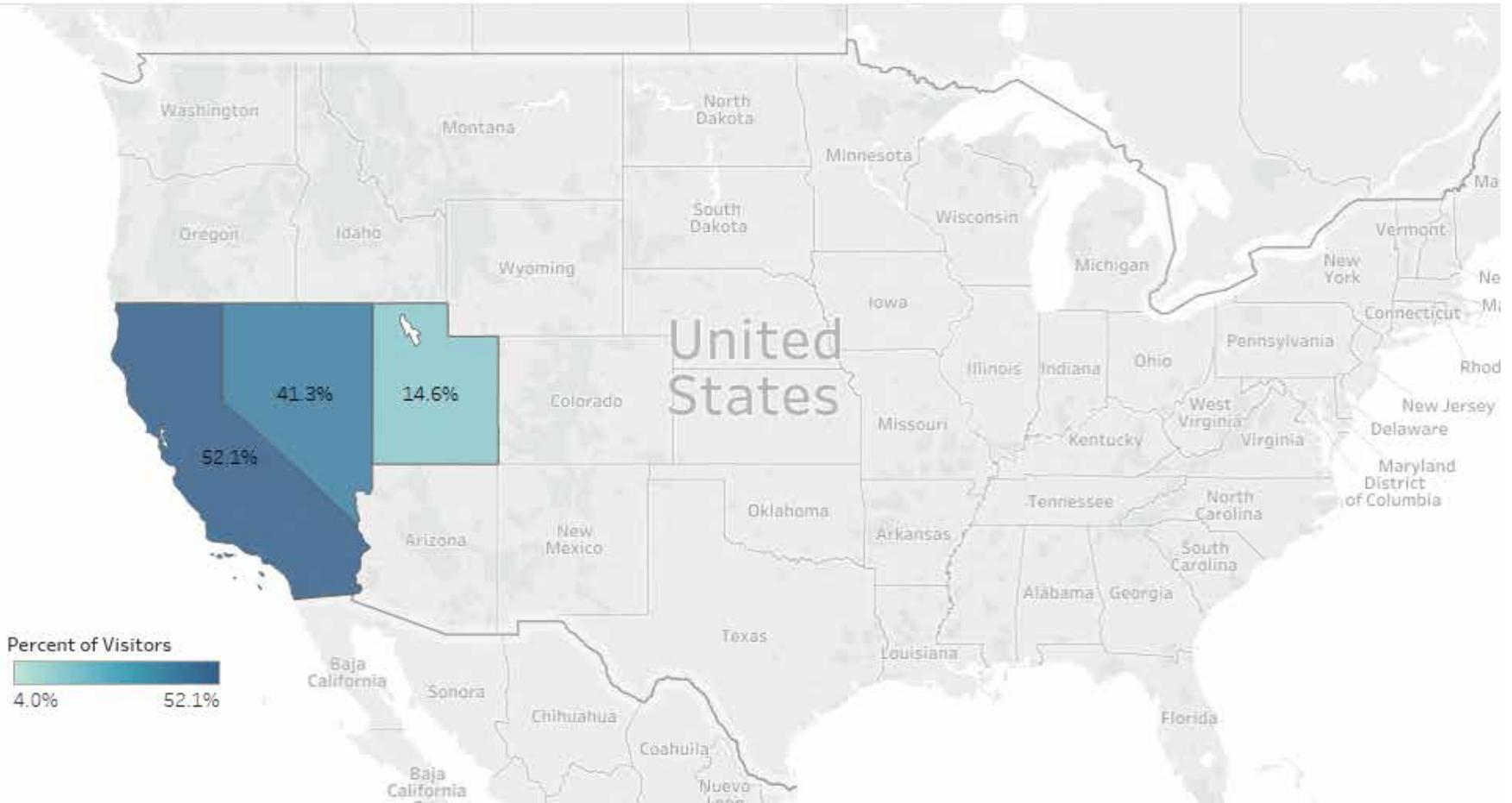
Source: SIAT, 2015

# Arizona Destinations Visited



# Other States Visited on AZ Trip - Japan

Japan

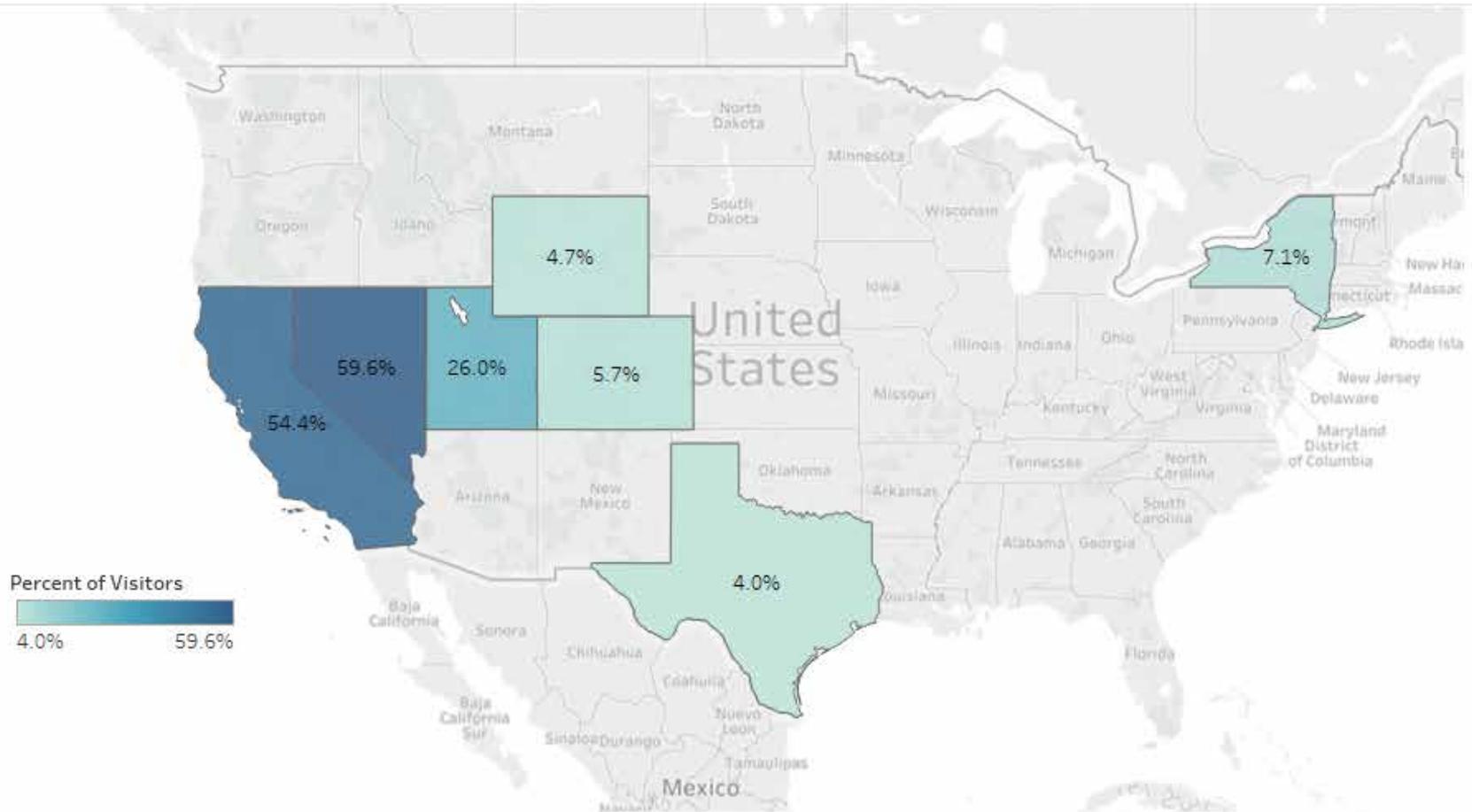


Source: SIAT, 2015

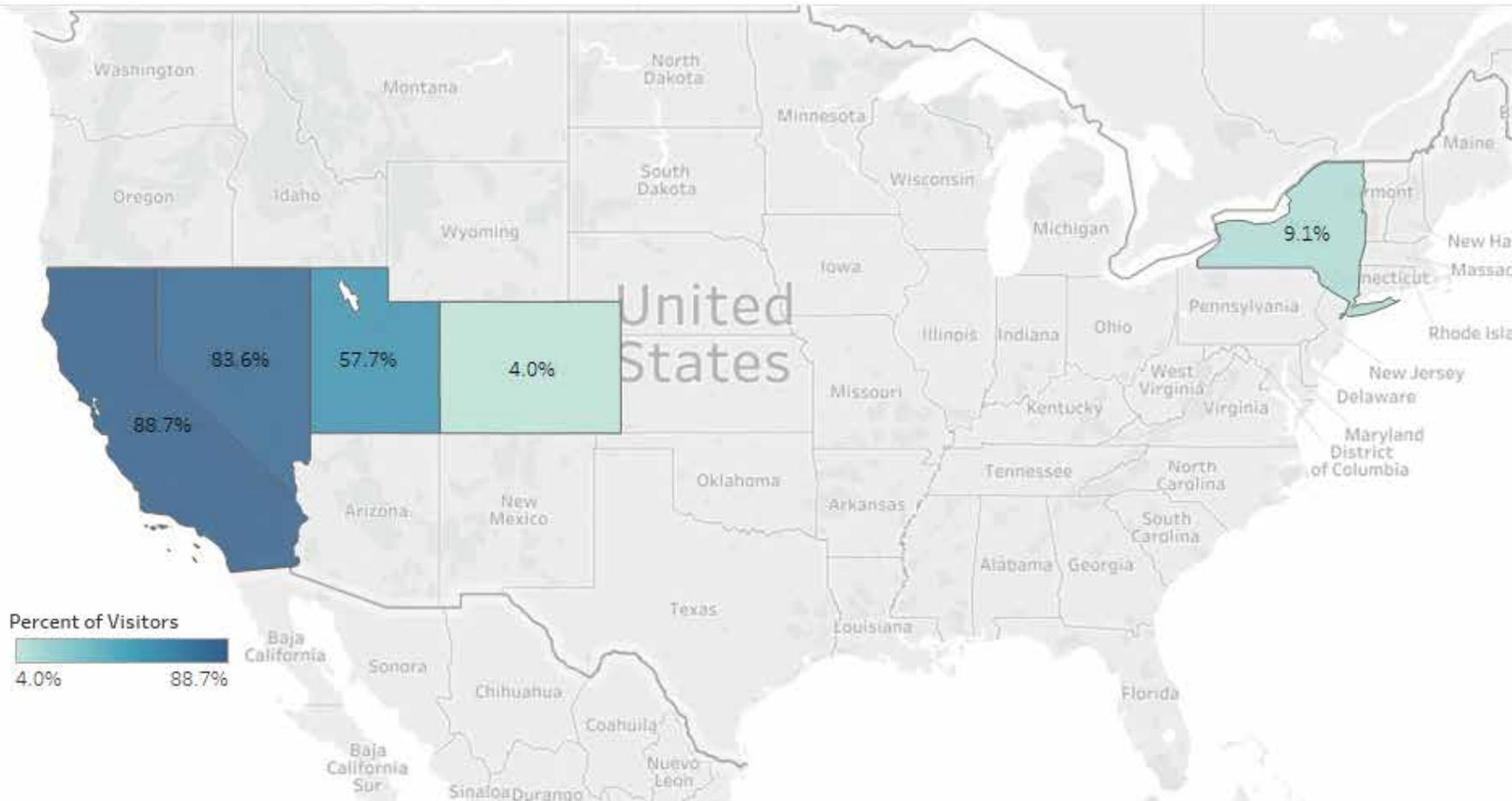
**ARIZONA**  
OFFICE OF TOURISM



# Other States Visited on AZ Trip - UK

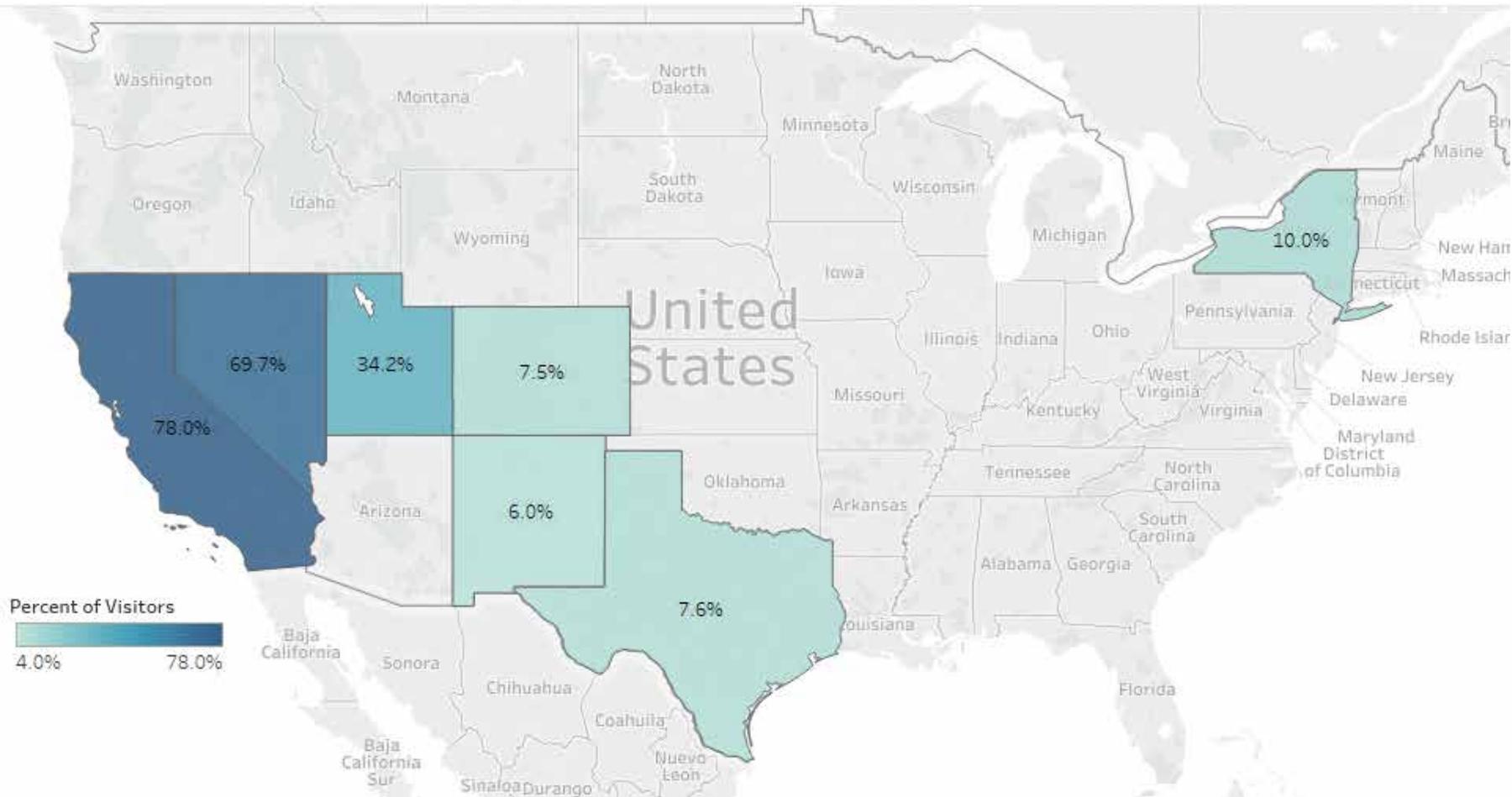


# Other States Visited on AZ Trip - France



Source: SIAT, 2015

# Other States Visited on AZ Trip - Germany



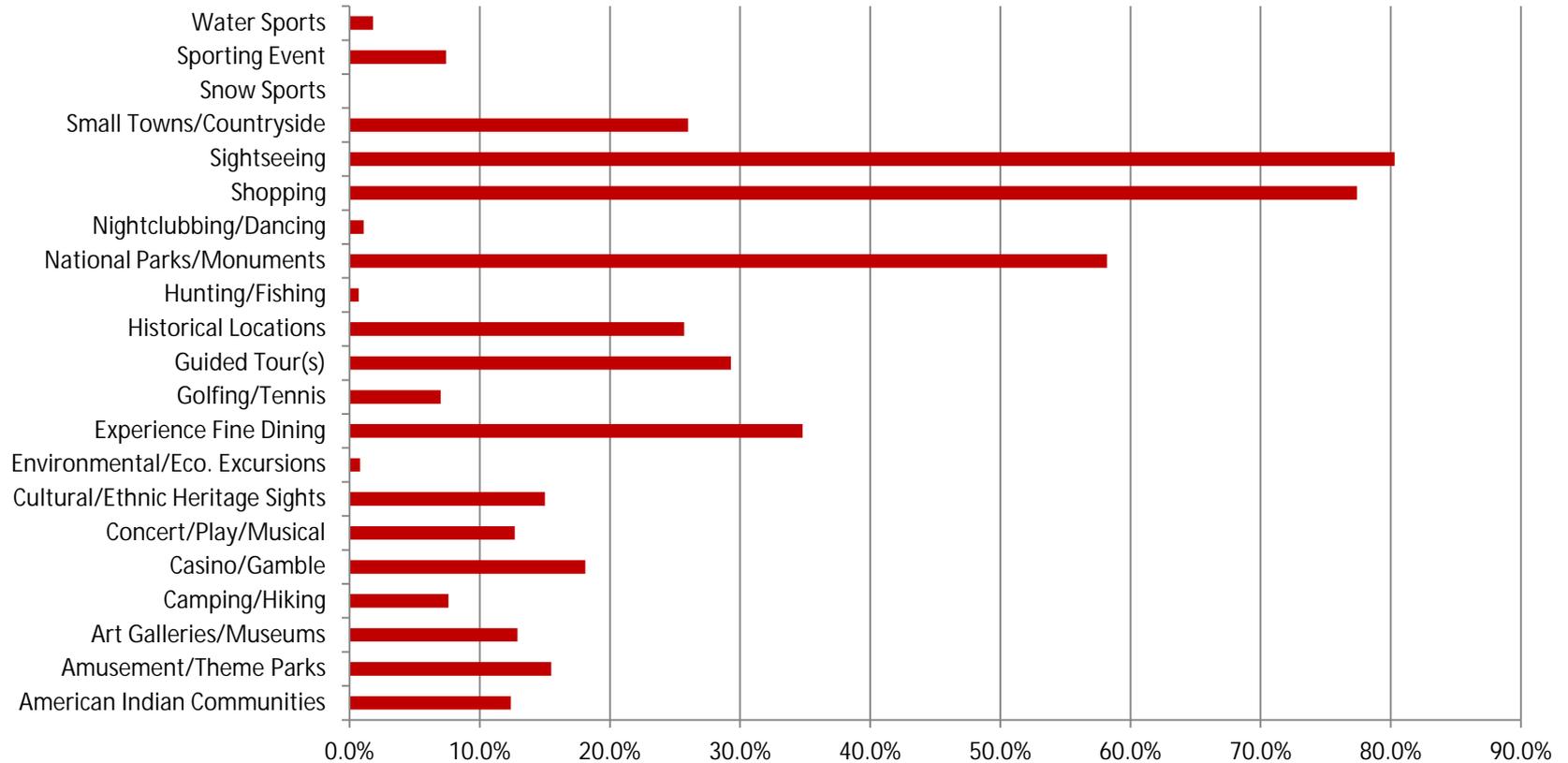
Percent of Visitors  
4.0% 78.0%

**ARIZONA**  
OFFICE OF TOURISM

Source: SIAT, 2015

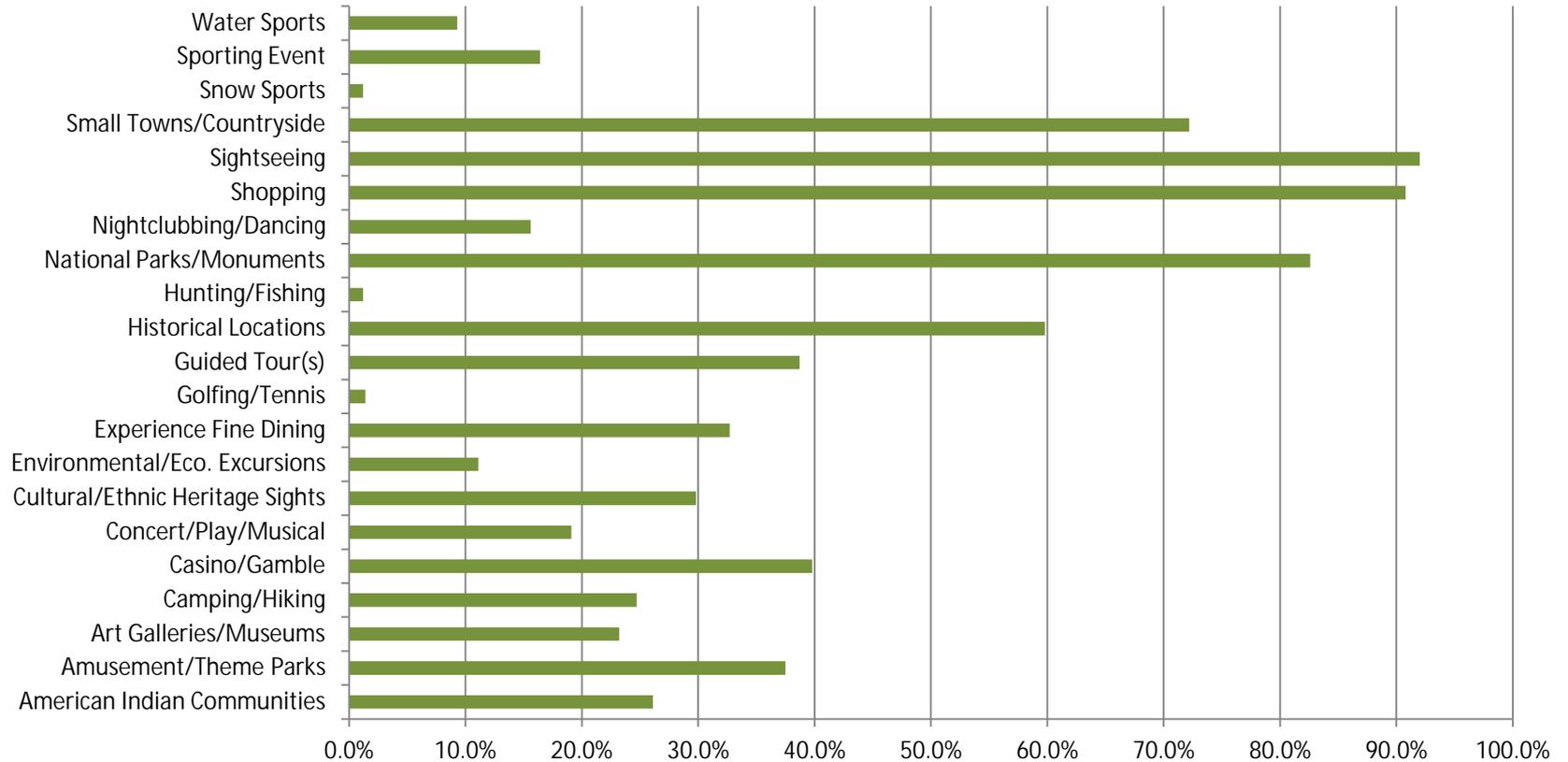
# Activities

## Japan To AZ



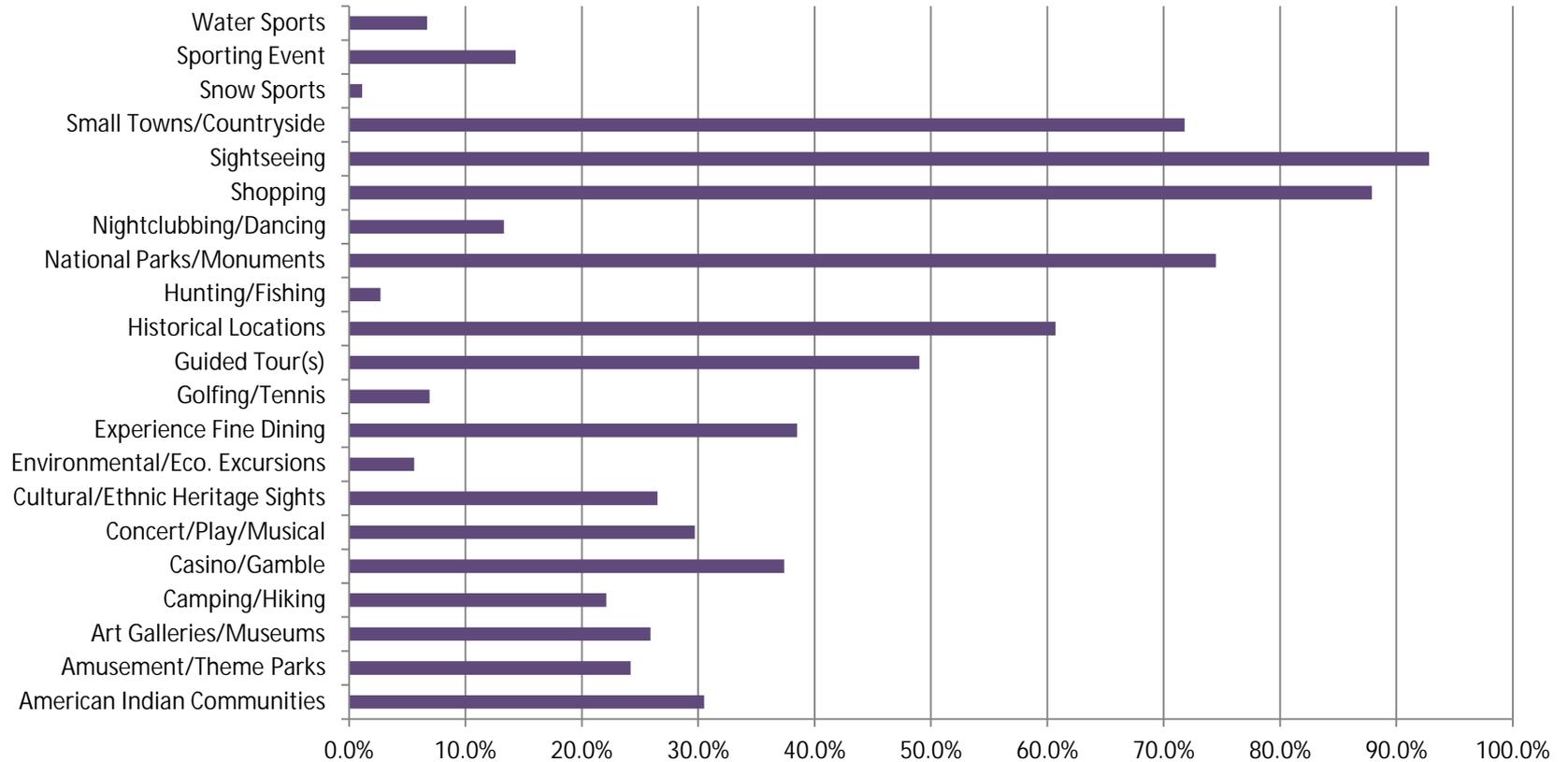
# Activities

## Germany To AZ



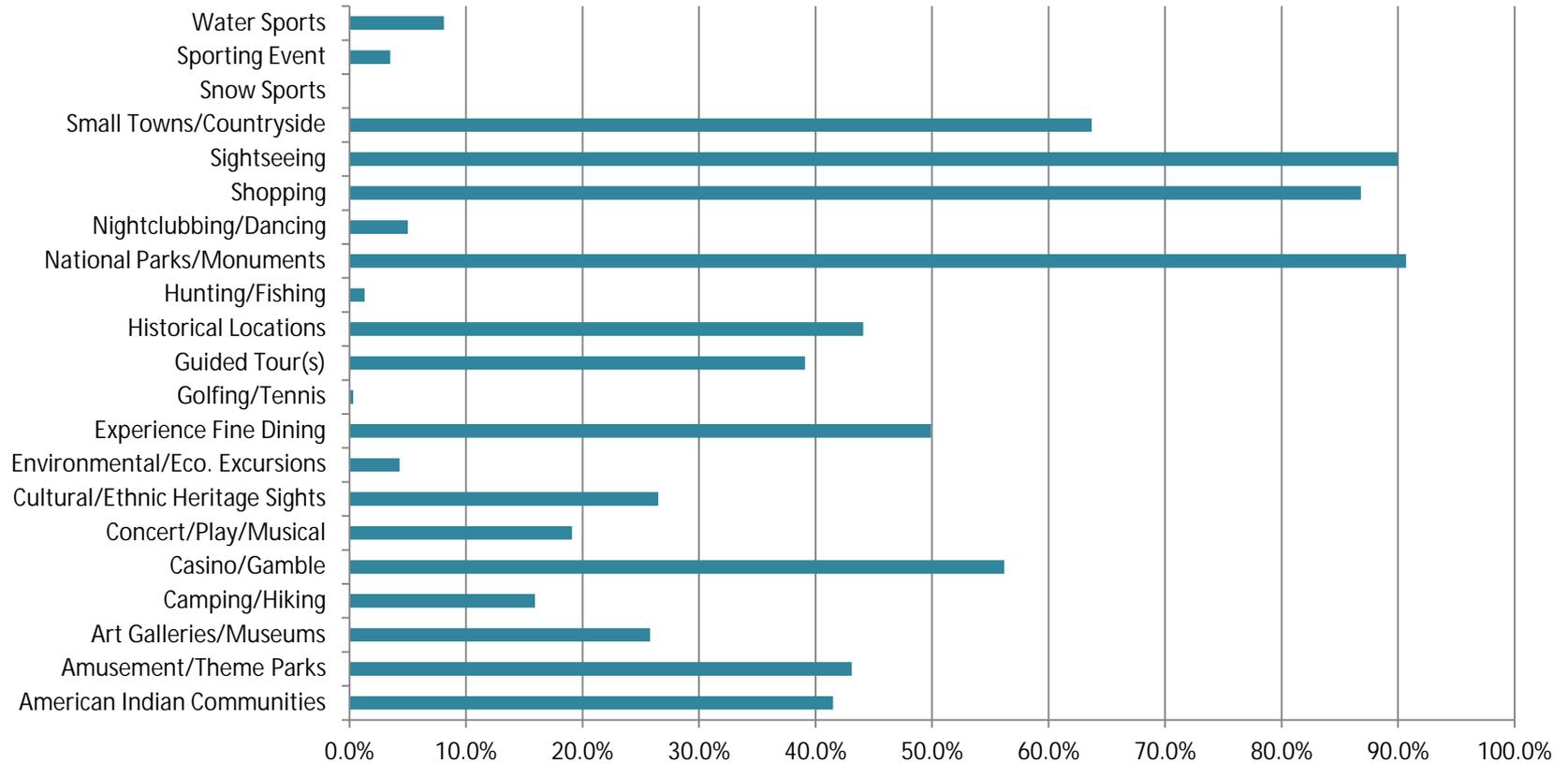
# Activities

## UK To AZ



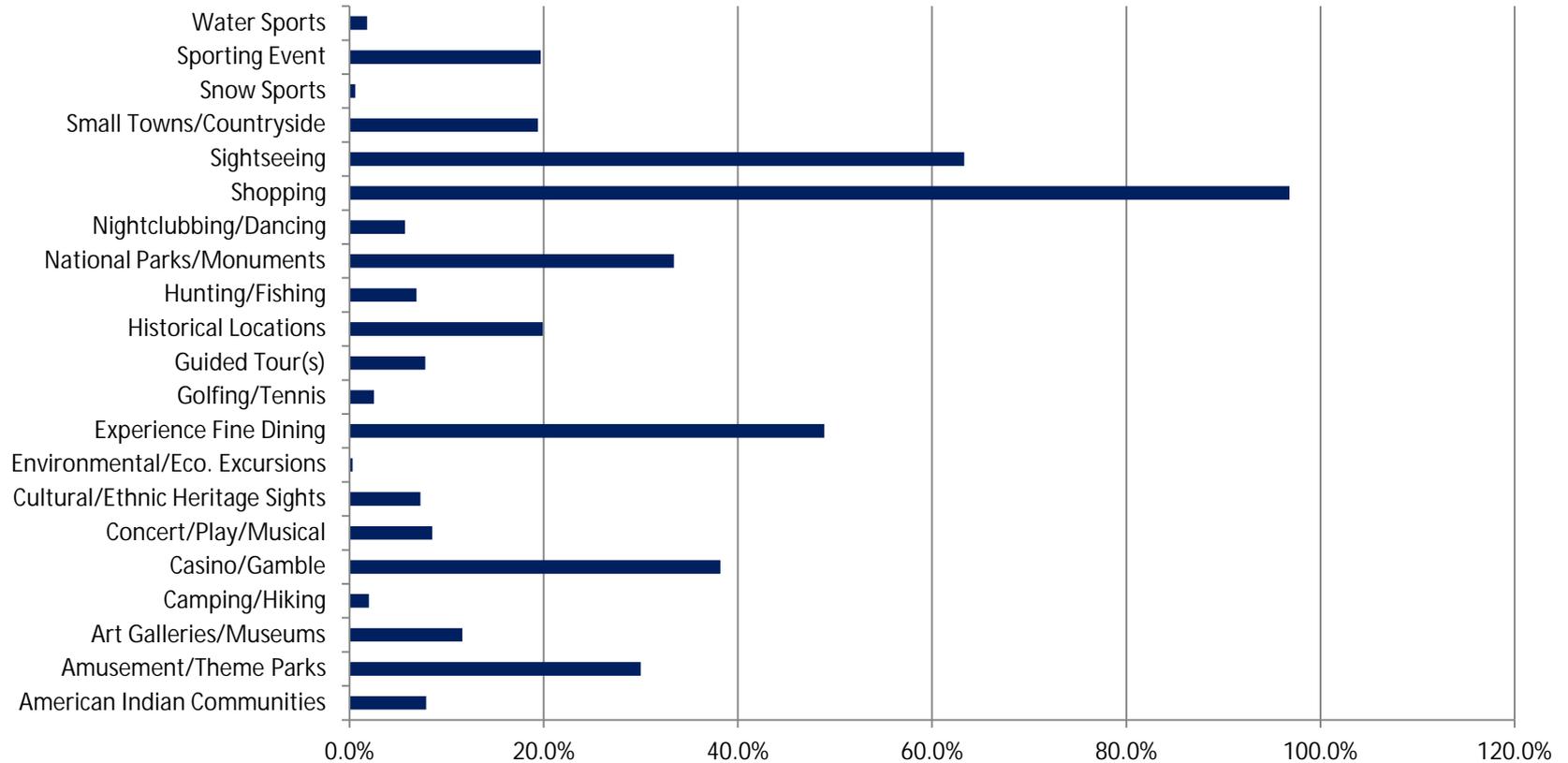
# Activities

## France To AZ



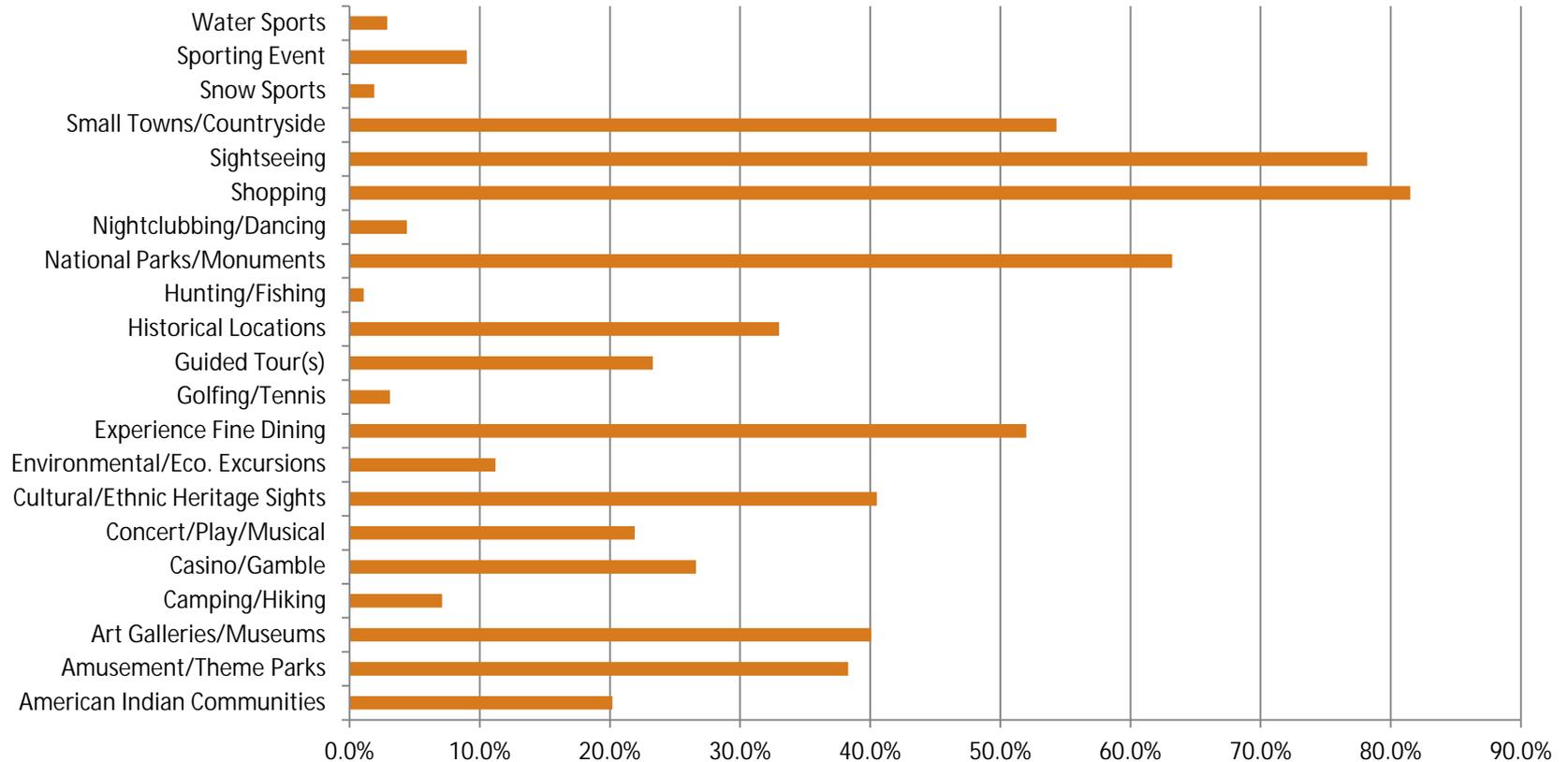
# Activities

## Mexico To AZ



# Activities

## China/Hong Kong/Taiwan To AZ

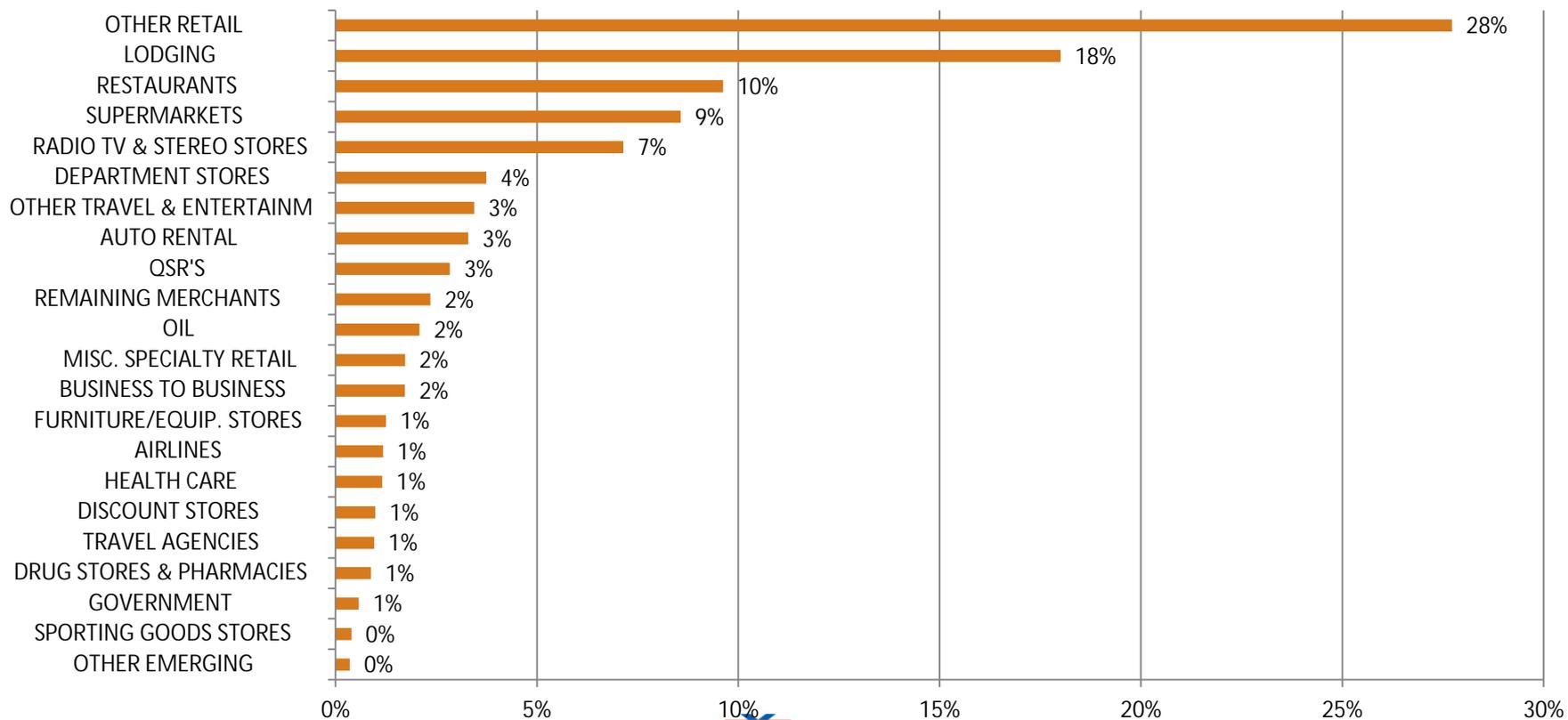


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# VISA CARD SPENDING PATTERNS

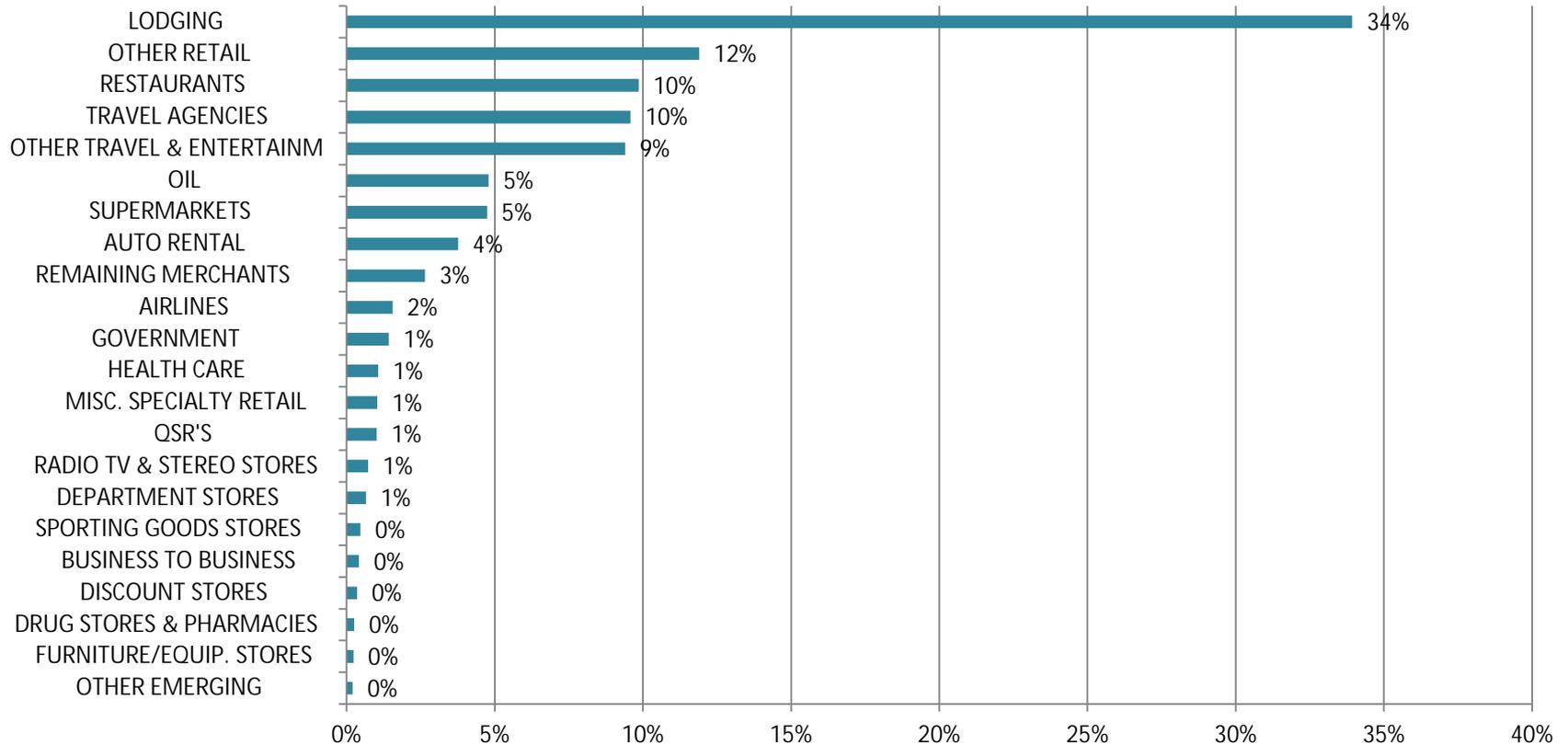
# Spending by Merchant Category

## China



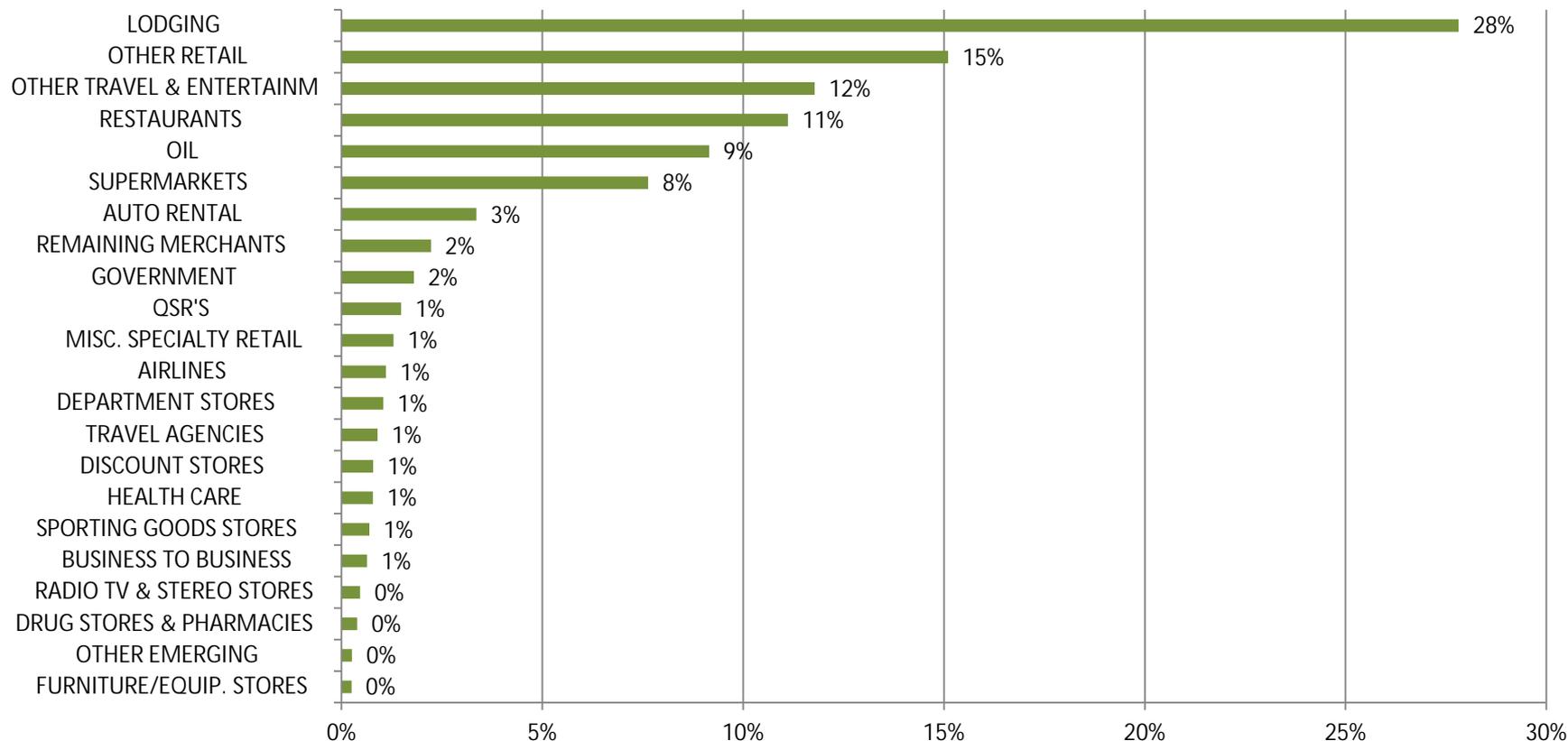
# Spending by Merchant Category

## France



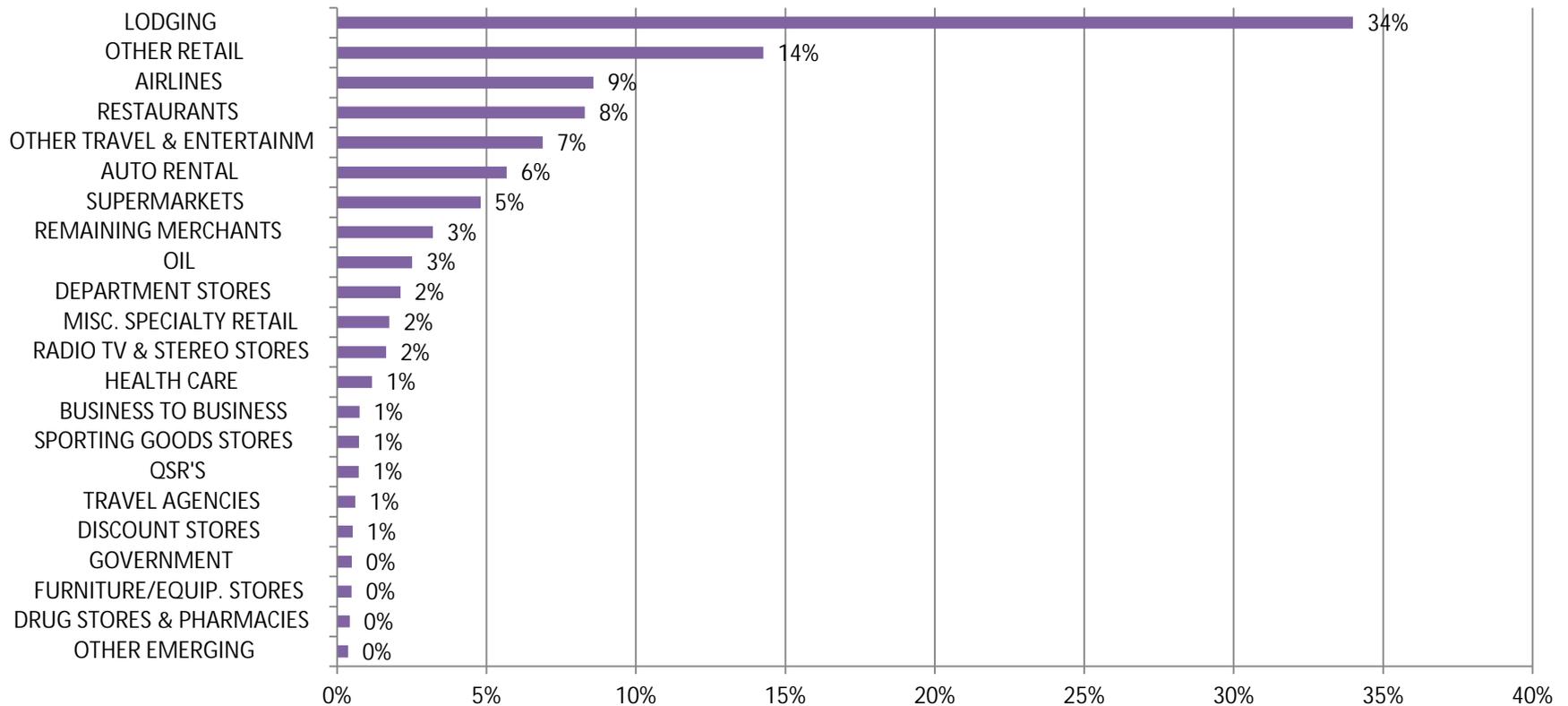
# Spending by Merchant Category

## Germany



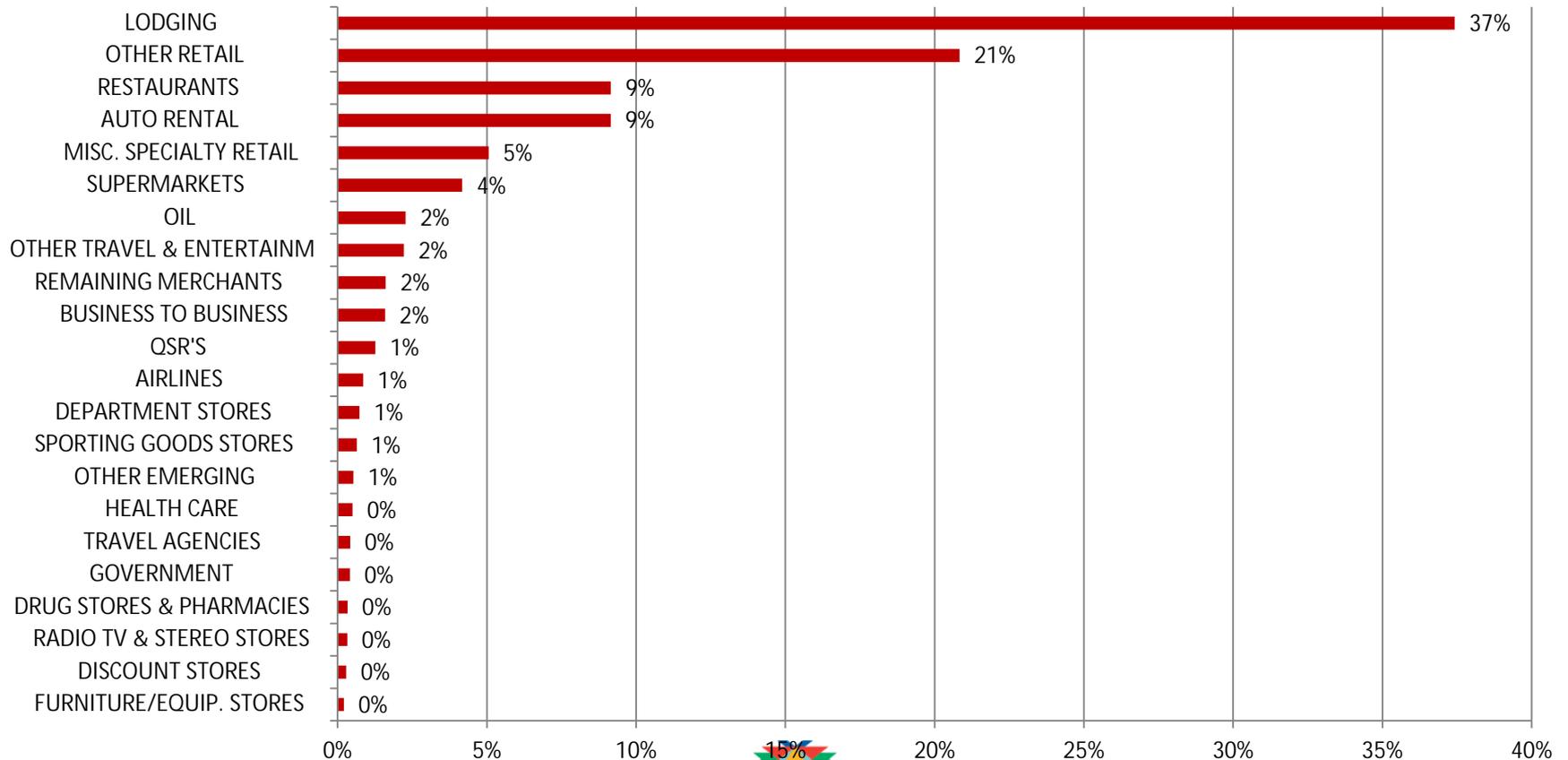
# Spending by Merchant Category

## United Kingdom



# Spending by Merchant Category

## Japan

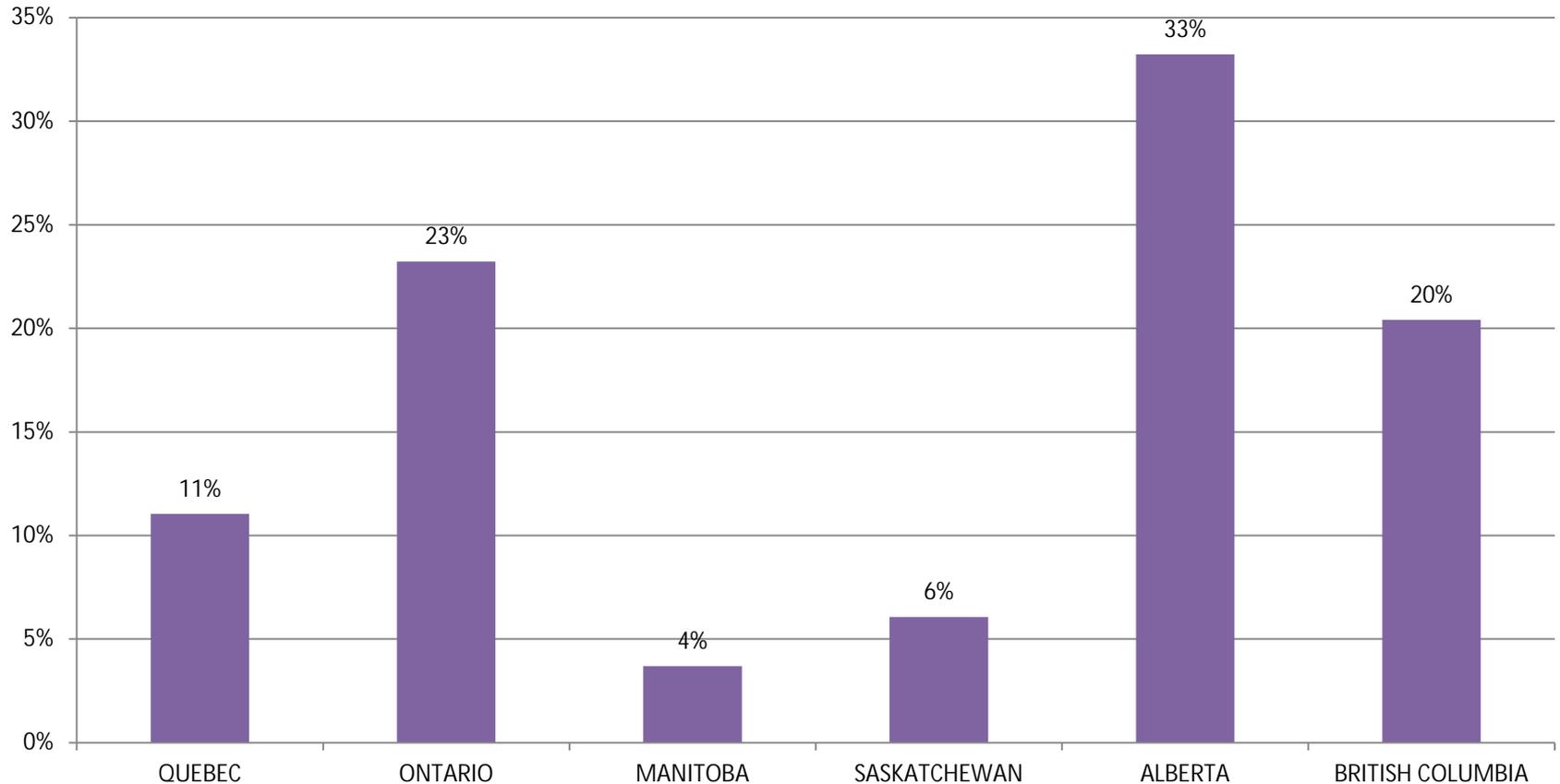


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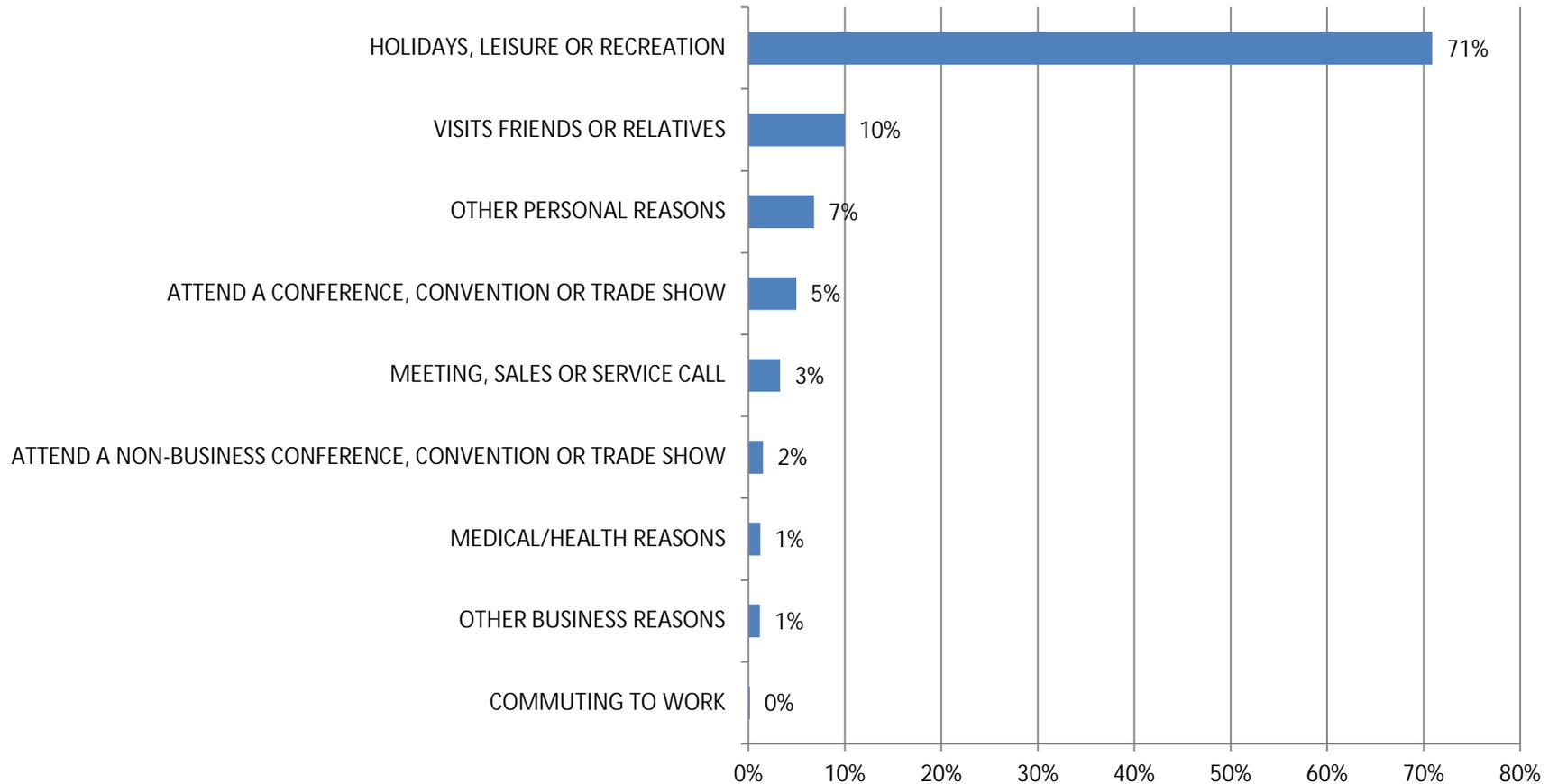
# CANADIAN VISITATION TO ARIZONA

Statistics Canada

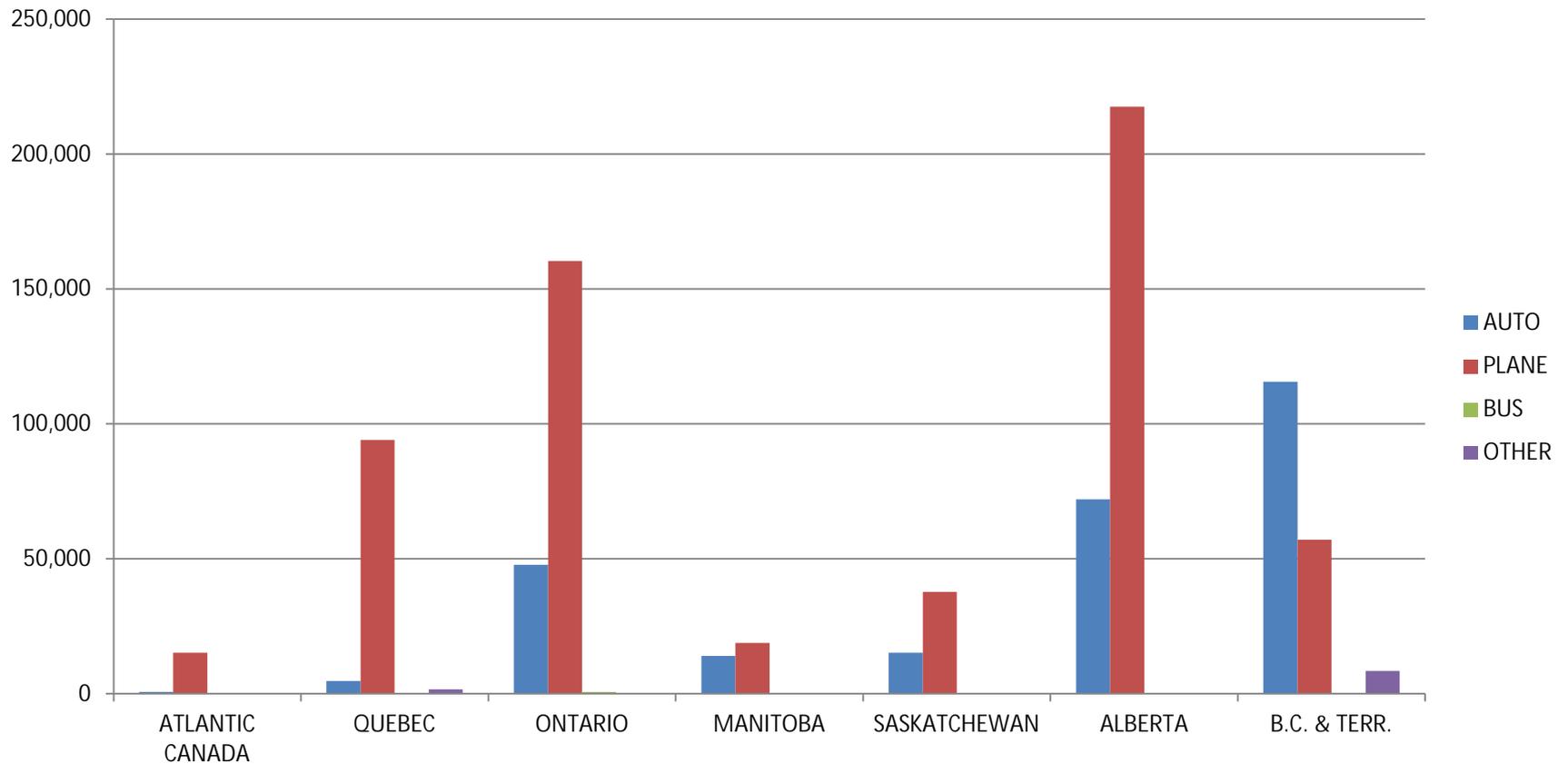
# Province of Residence – Visitors to AZ



# Purpose of Trip to AZ

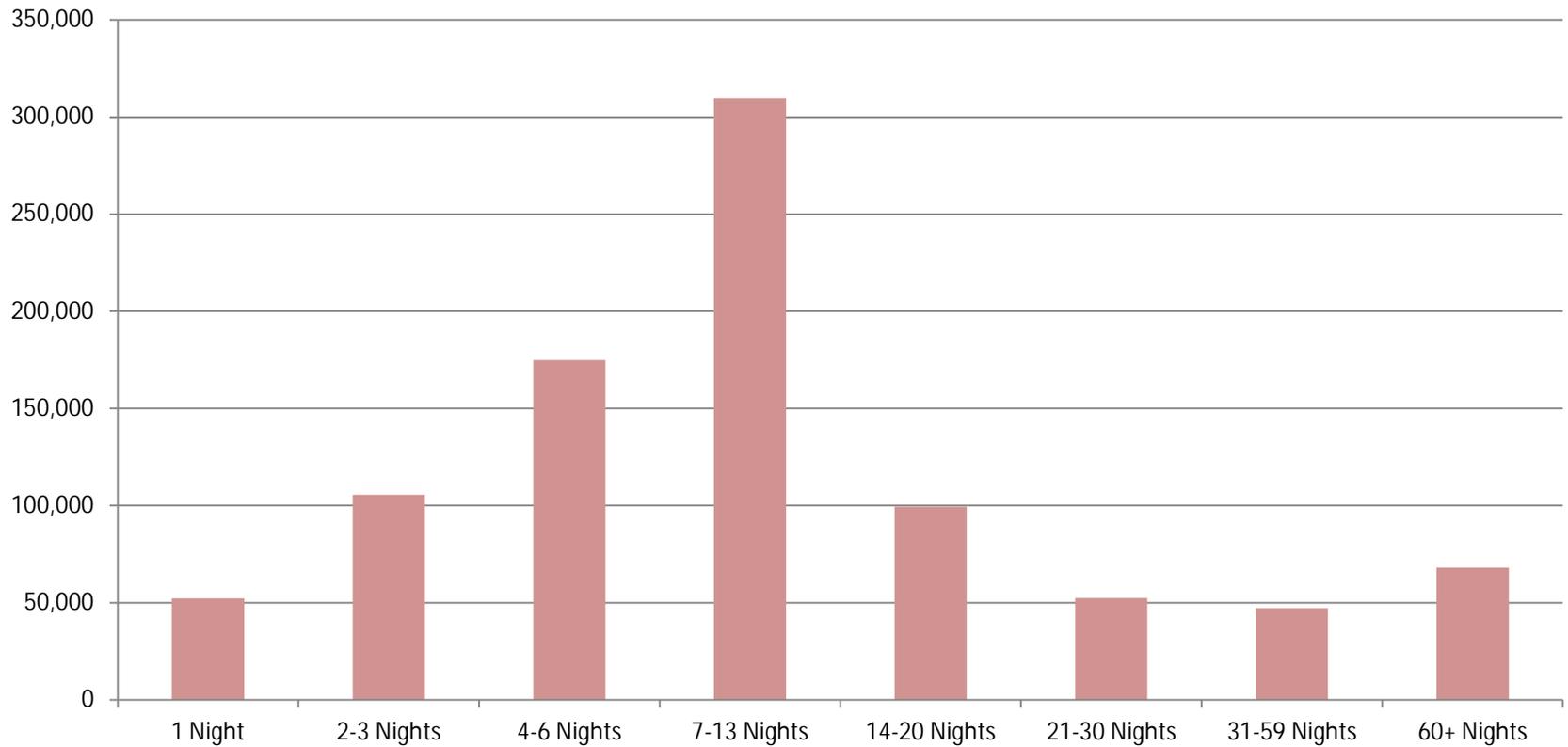


# Mode of Entry



# Length of Stay

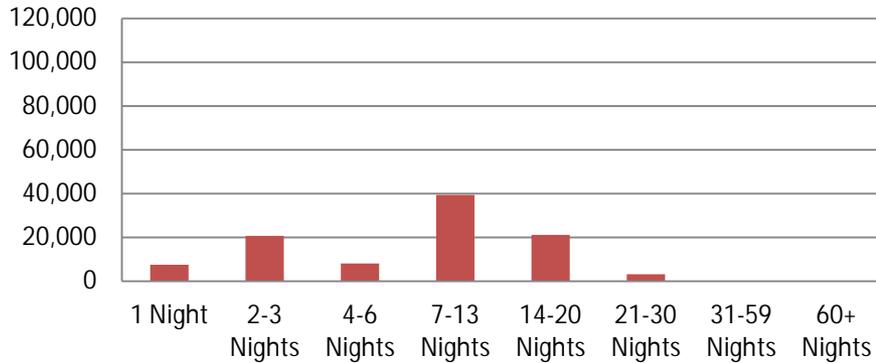
## Canada



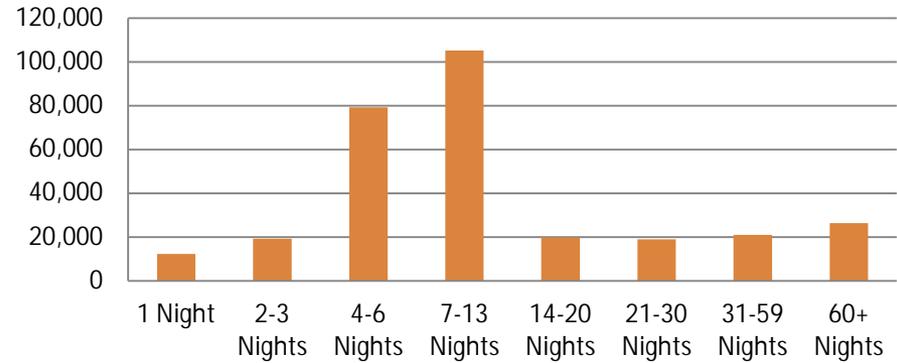
Source: Statistics Canada, 2014

# Length of Stay by Province

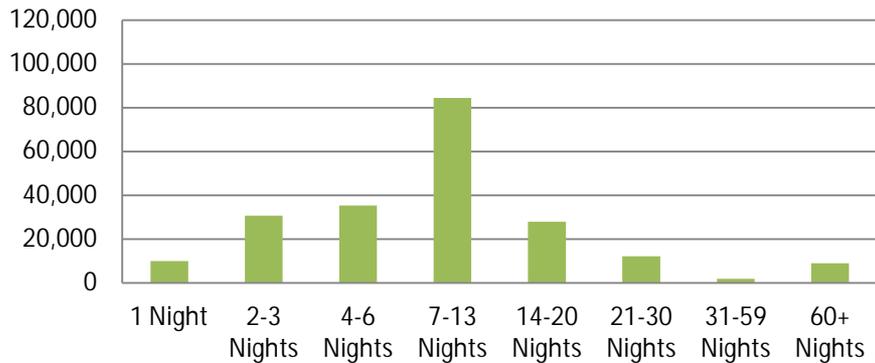
## Quebec



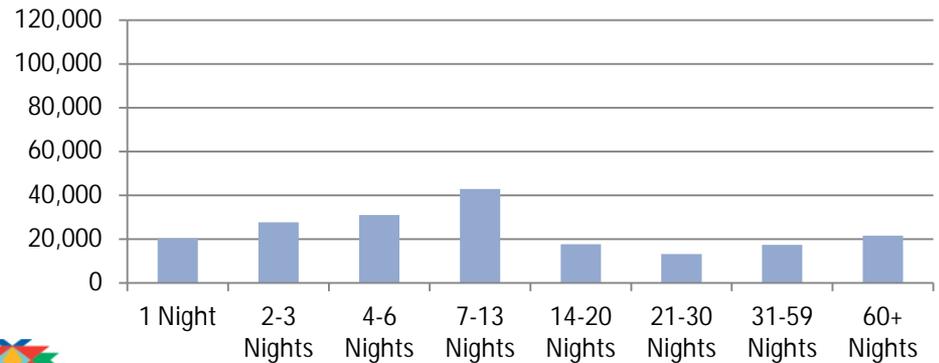
## Alberta



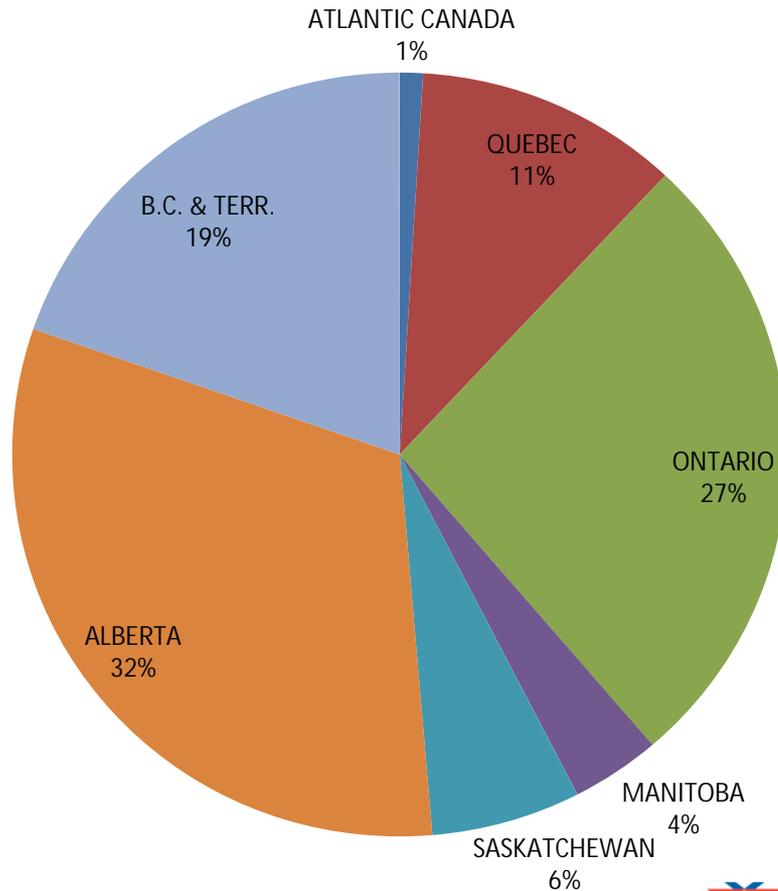
## Ontario



## B.C. & TERR.



# Spending by Province



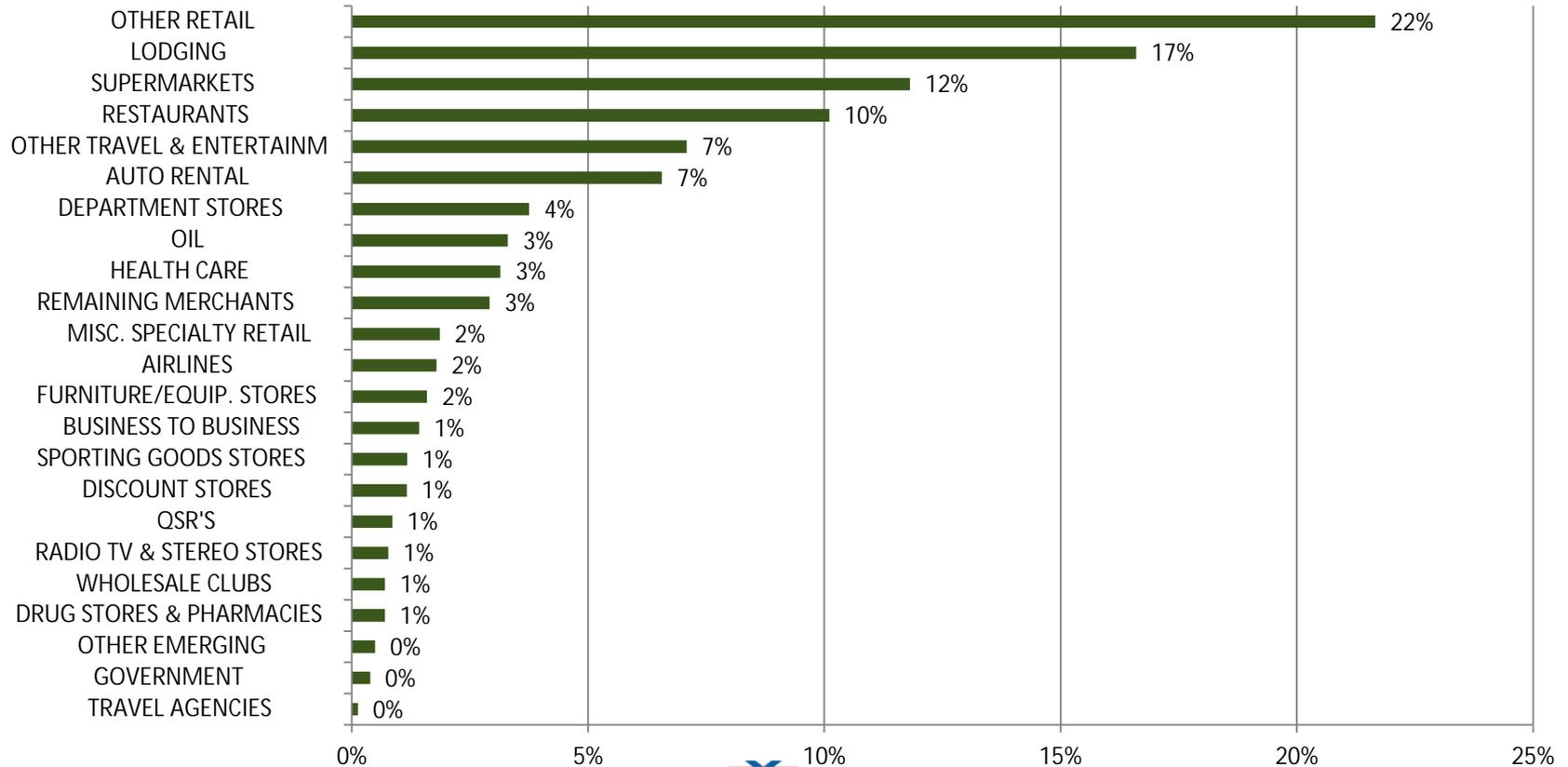
## Average Reported Spending per Visit (in 2014 Canadian Dollars)

Quebec	\$1,226 CAD
Ontario	\$1,413 CAD
Alberta	\$1,171 CAD
B.C. & Territories	\$1,149 CAD



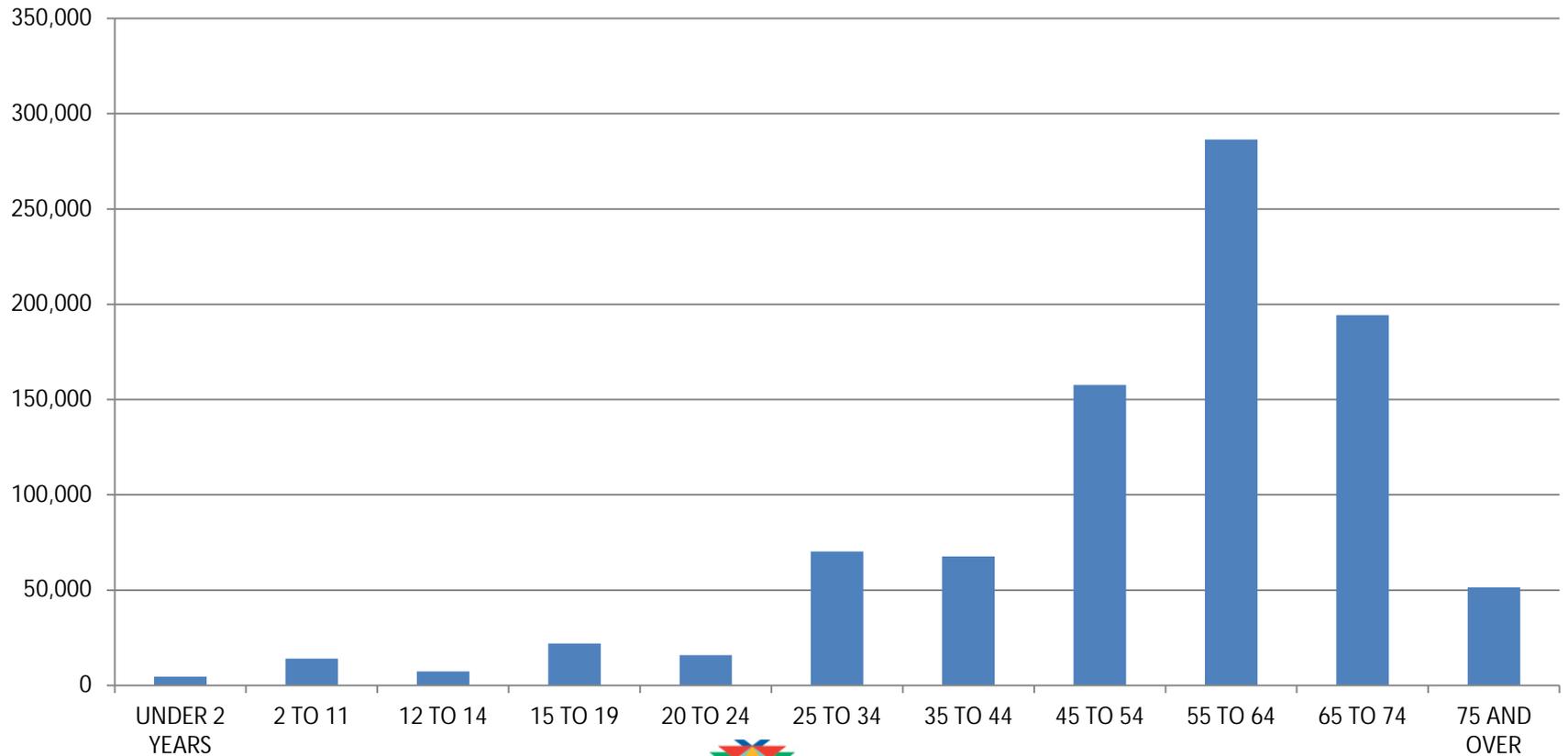
# Visa Card Spending in AZ by Merchant Category

## Canada



# Age

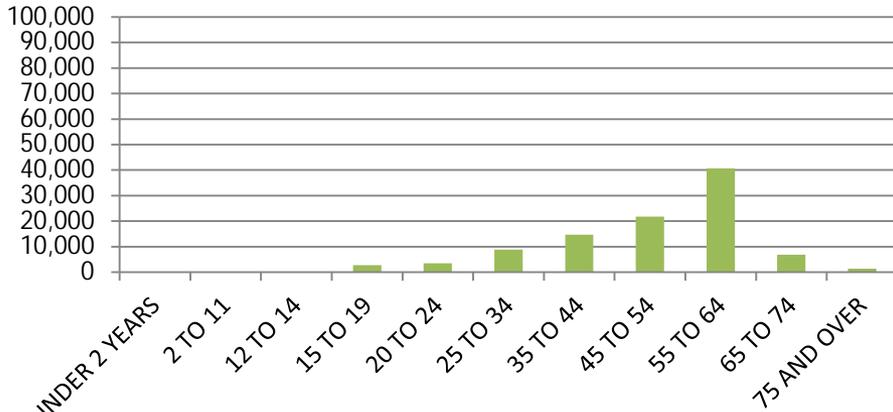
## Canada



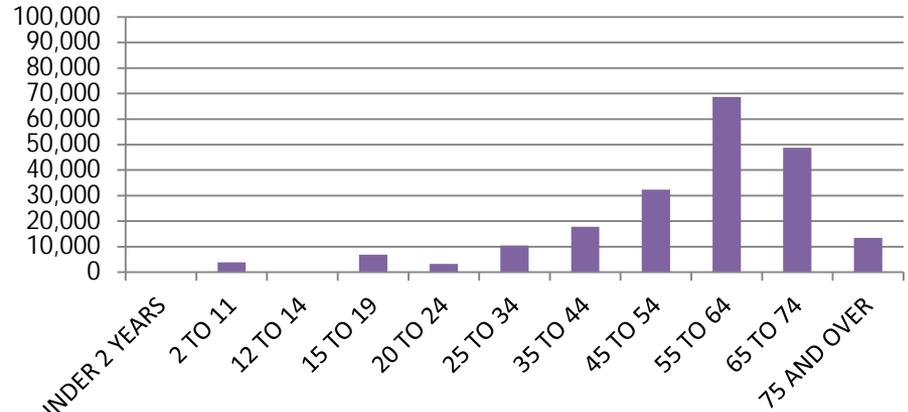
Source: Statistics Canada, 2014

# Age by Province

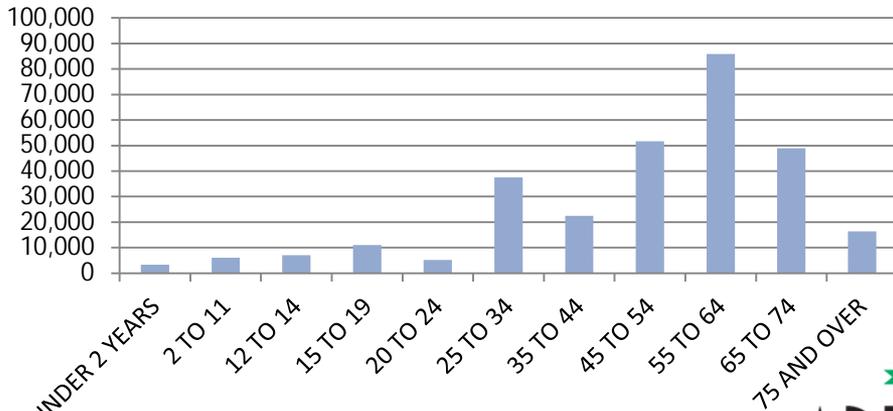
## QUEBEC



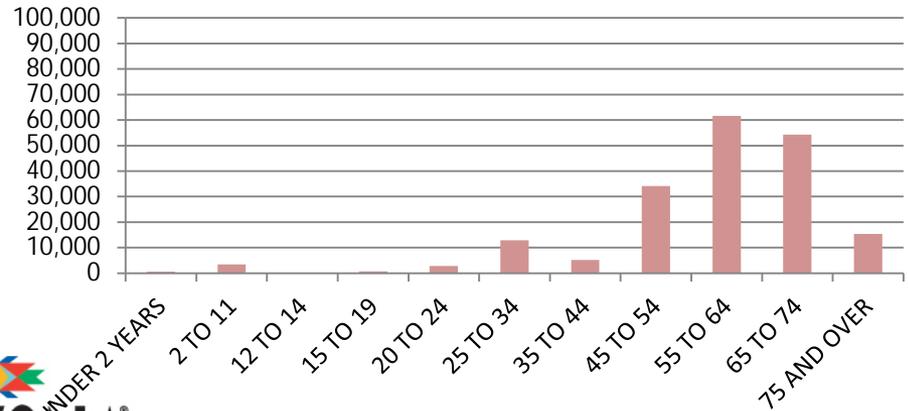
## ONTARIO



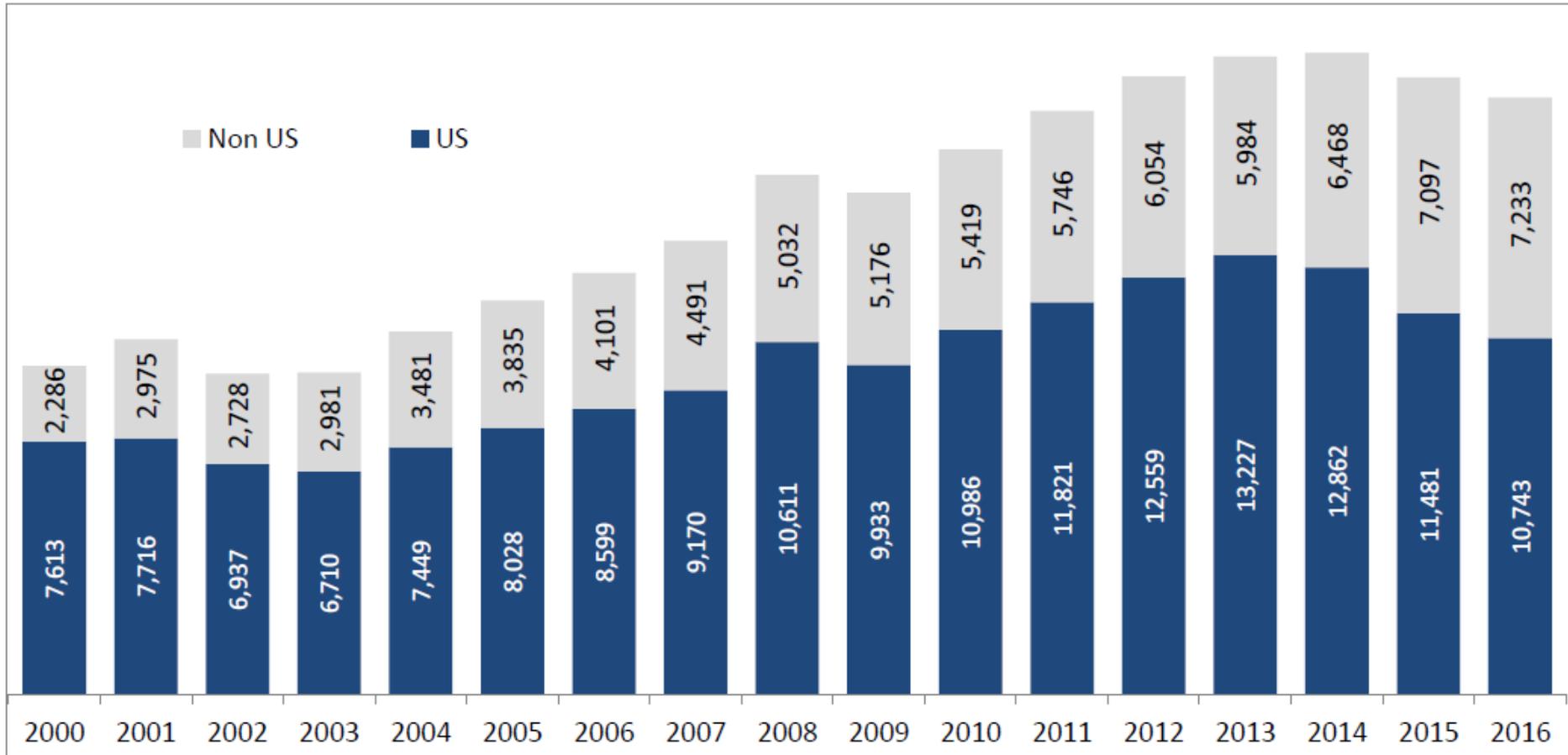
## ALBERTA



## B.C. & TERR.



Canadian Outbound Leisure Travel (000s of trips)  
 (January-August each year)



Source: CBoC estimates of leisure trips from total outbound trips as reported by Statistics Canada.

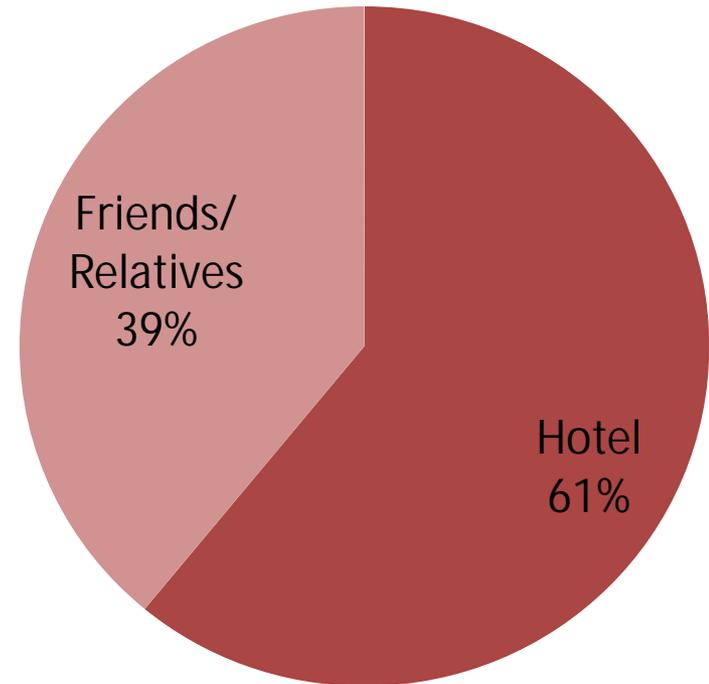
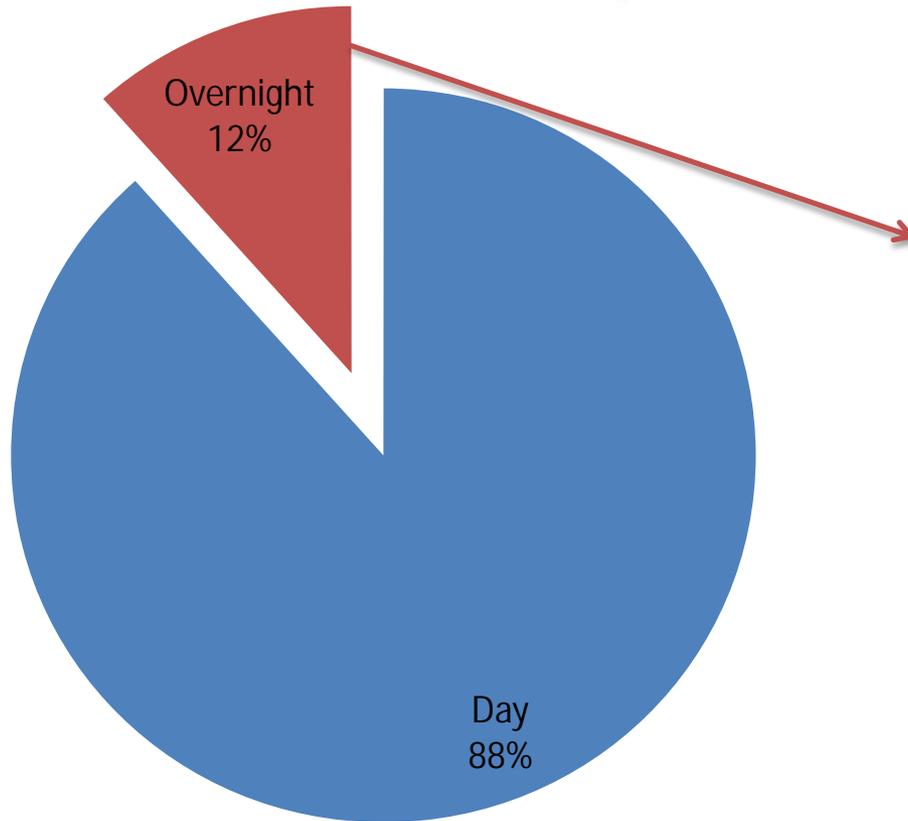


Source: Conference Board of Canada, October 2016

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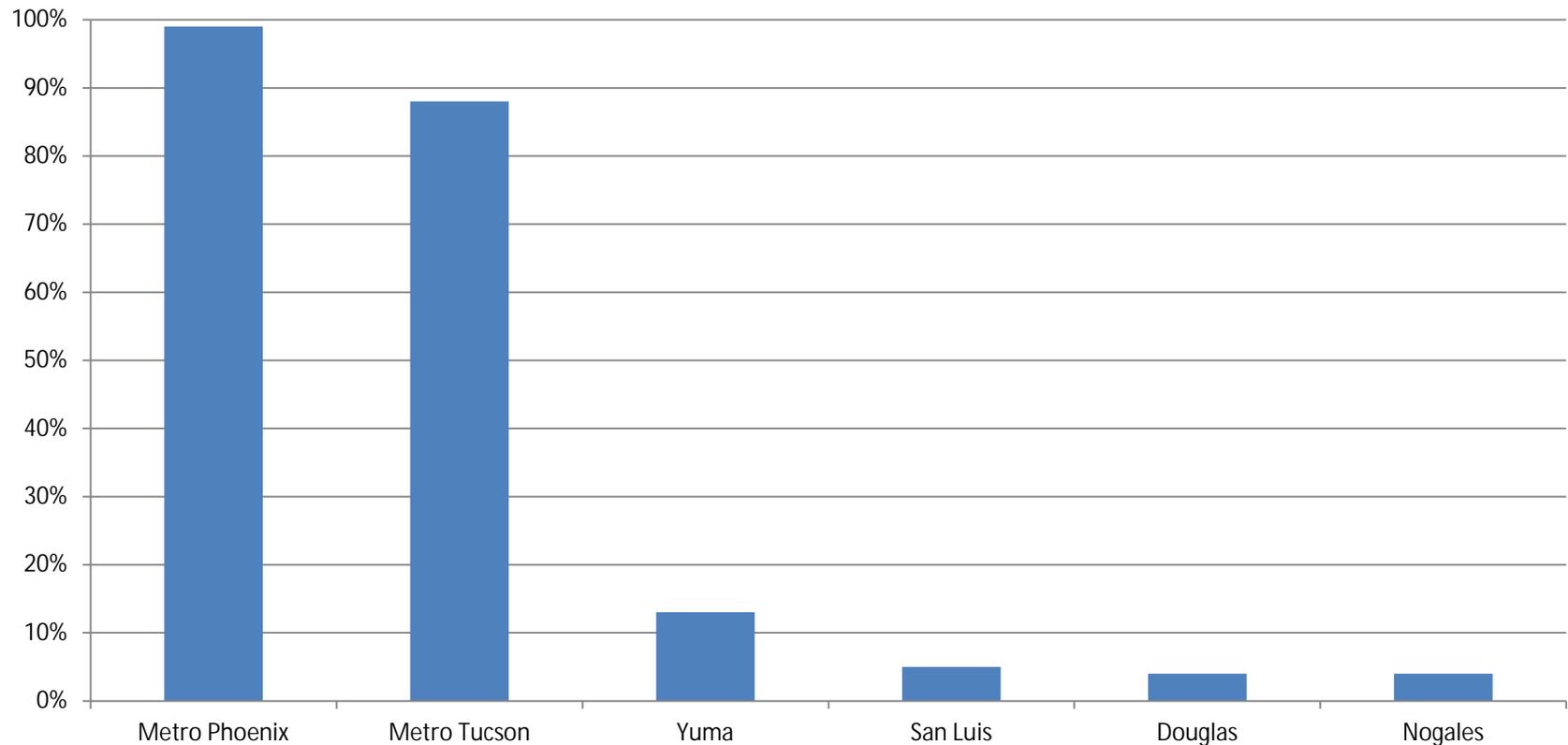
# MEXICAN VISITATION TO ARIZONA

# Visitor Types



# Overnight Visitors - Destination

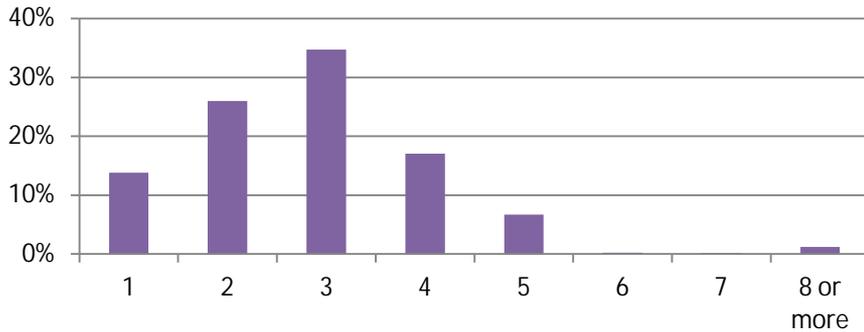
% of Visitors Who Stayed Overnight



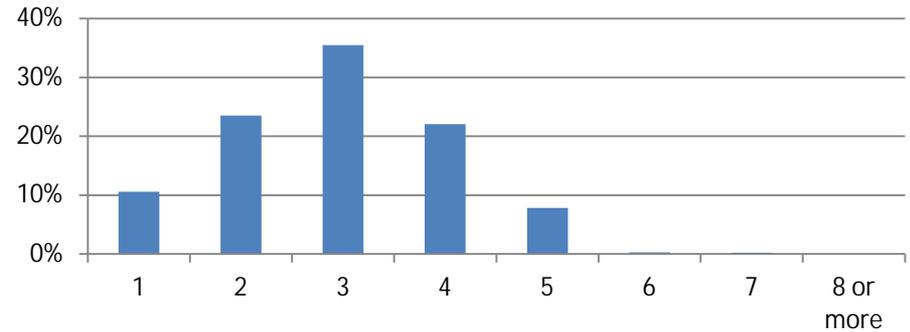
Source: 2007-08 Mexican Visitors to Arizona, University of Arizona

# Nights Stayed by Mode of Transportation

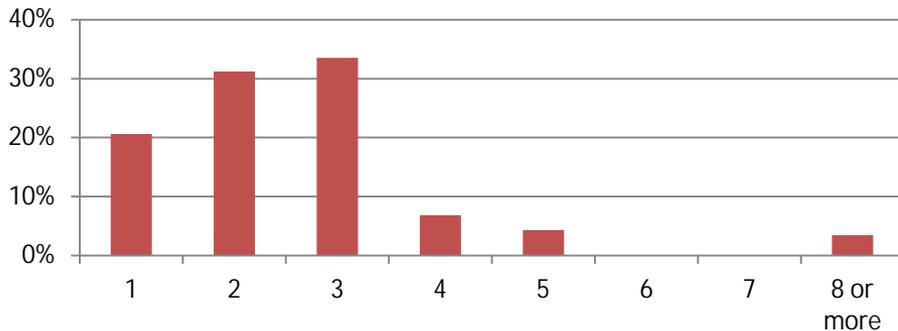
## All Modes



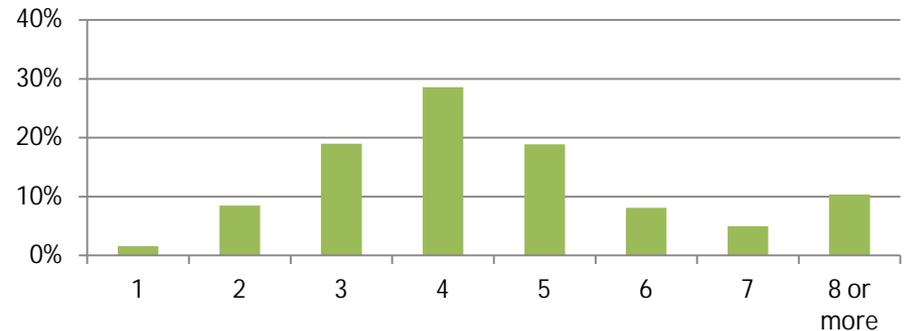
## Motor Vehicle



## Pedestrian

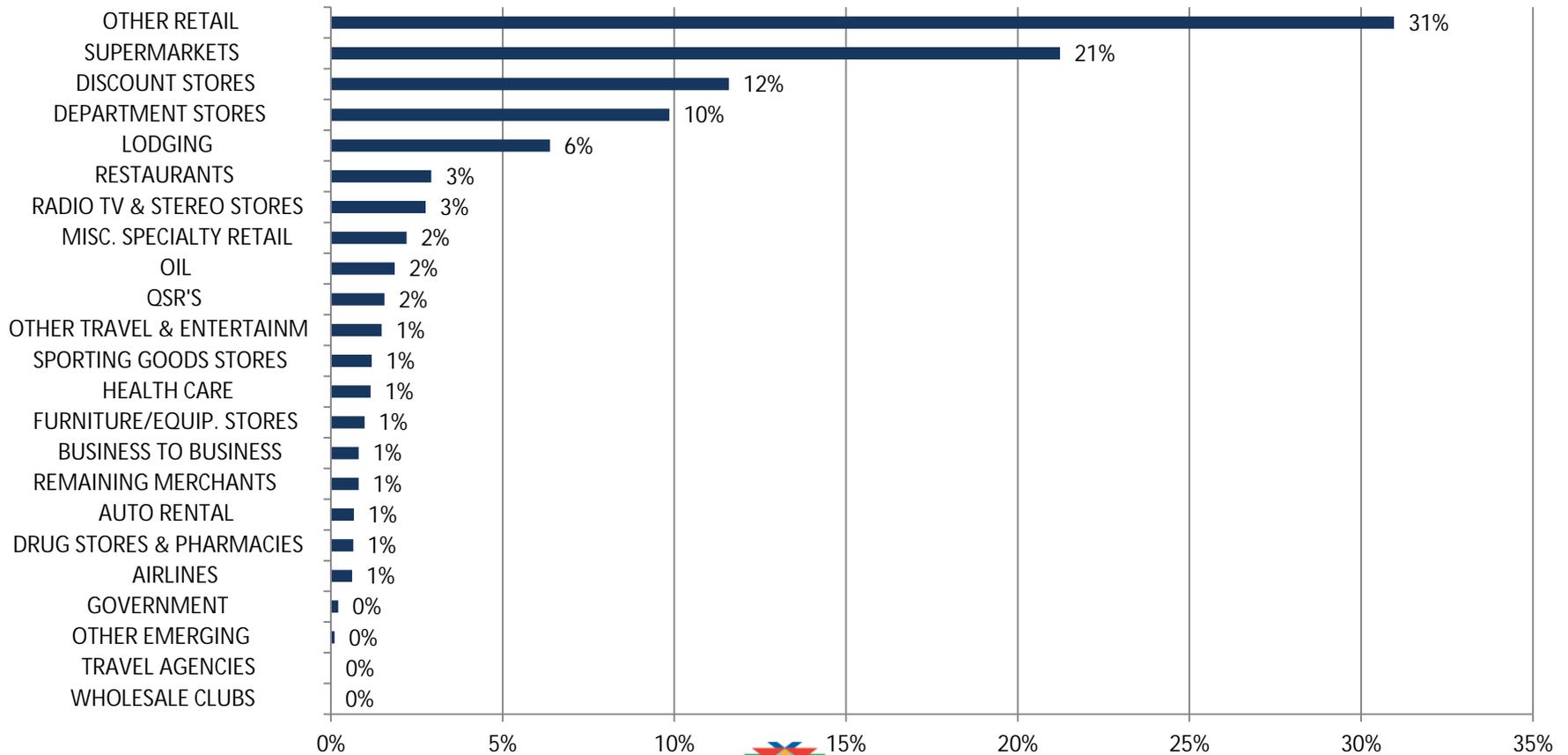


## Air



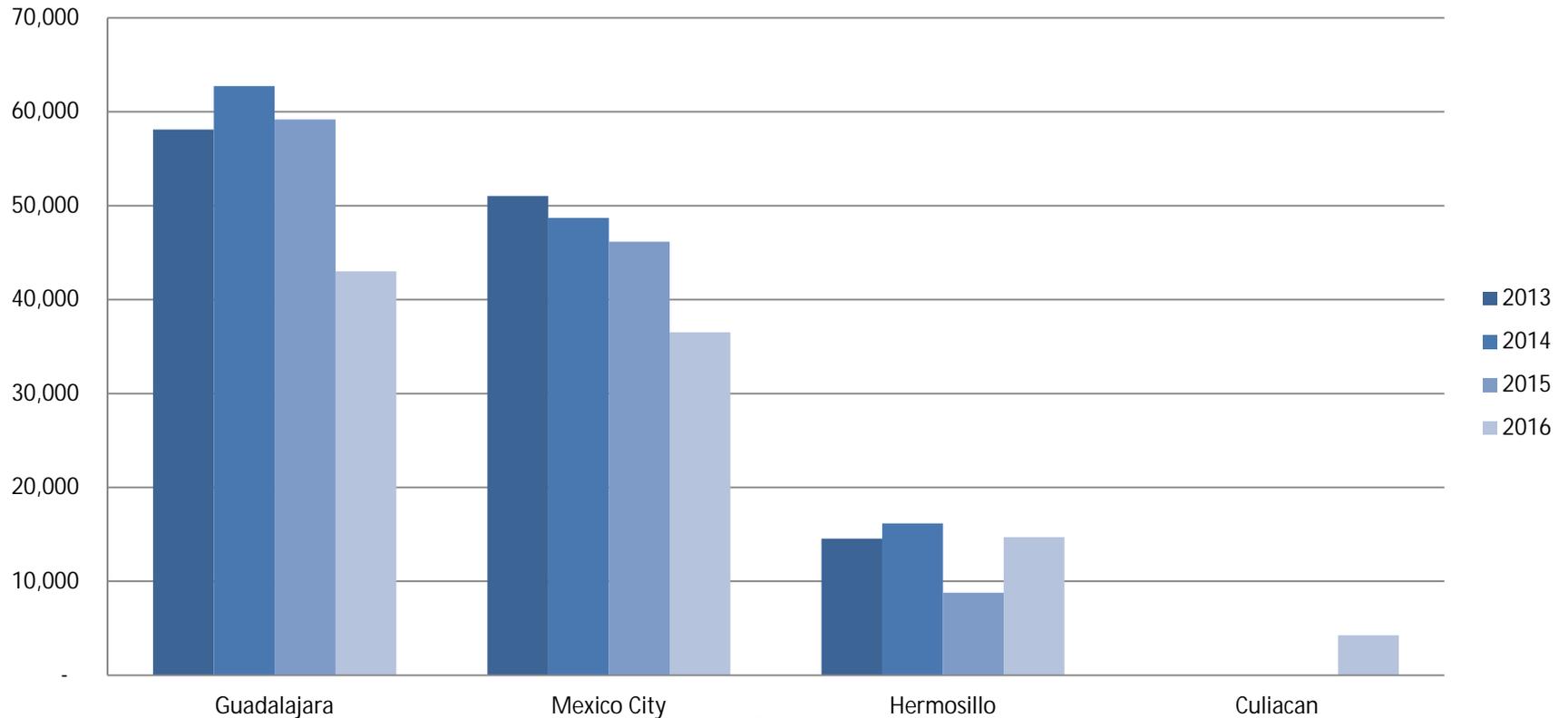
# Visa Spending in AZ by Merchant Category

## Mexico



# Direct Flights from Mexico to AZ

August YTD



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Presentation slides will be available after the webinar on [tourism.az.gov](http://tourism.az.gov) under "Visitation and Profiles"