



AOT in Action

Welcome to AOT in Action, your weekly e-newsletter from the Arizona Office of Tourism (AOT).

A Message from Director Sherry Henry:

Good afternoon,

We have officially kicked off our national campaign, “Let Yourself Go.” We moved up the start of the campaign by a month to reach out and further inspire consumers to choose Arizona as their vacation destination. This campaign is the first of five other major marketing promotions we produce annually to motivate travelers to visit the Grand Canyon State.

In even more exciting news, we have launched an [Arizona Travel Impacts App](#)! Now you can access, through your smart phone or tablet, the economic impact data on spending, earnings, employment, and taxes generated by the Arizona Travel and Tourism Industry for each county and region.

More information about both these programs can be found in the **AOT News** section below.

Have a great week,

Sherry Henry
Director, Arizona Office of Tourism

AOT News

Arizona Office of Tourism Launches National Travel Advertising Campaign

The Arizona Office of Tourism (AOT) has officially launched its national travel advertising campaign, “Let Yourself Go.” This campaign is an extension of what the agency launched last year, which generated more than six million unique visits to AOT’s consumer website, [visitarizona.com](#). The national campaign is the first of five major marketing promotions annually produced by AOT to inspire travelers to visit the Grand Canyon State. [Read Full Article.](#)

Arizona Office of Tourism Joins Transportation and Trade Corridor Alliance

Underscoring the importance of Arizona's tourism industry as the state's number one export-oriented industry, the Arizona Office of Tourism (AOT) has joined the Transportation and Trade Corridor Alliance (TTCA) steering committee. The TTCA focuses on a vision of moving Arizona towards being more globally competitive on trade, investment, and infrastructure, which brings new wealth and jobs to the state. It has an aspirational goal of doubling Arizona's trade with global markets by 2025. [Read Full Article](#).

AOT Launches Arizona Travel Impacts App!

The app provides data on direct spending, direct earnings, employment, and tax receipts generated by tourism in Arizona by county and region. Visit [Arizona Travel Impacts](#) to download the app.

The following reports are now available at tourism.az.gov:

- [Airport Passenger Volume August 2014](#) (preliminary)
- Lodging Performance
 - [Arizona Lodging September 2014](#)
 - [National, Regional, Arizona Lodging 3rd Quarter 2014](#)
 - [County Lodging 3rd Quarter 2014](#)
- Gross Sales
 - [July 2014](#)
 - [August 2014](#)
- [National Park Visitation, August 2014](#) (preliminary)
- [Painted Cliffs Welcome Visitor Counts, 3rd Quarter 2014](#)

Lodging Highlights:

Statewide, Occupancy grew 3.7% over September 2013, and Revenue per Available Room (RevPAR) increased by 7.7% to \$56 with Supply remaining flat at -0.8%. Nationally, lodging indicator growth has been between 3-5% YTD with Arizona typically keeping pace. For further information, please contact Colleen Floyd at cfloyd@azot.gov.

AOT Announces World Tour 2014!

To give statewide communities a more in-depth educational experience on the state's top international visitor markets, AOT will be bringing our international representatives to you for a series of seminars in northern, central and southern Arizona. The AOT World Tour will take place over three days – **Dec. 2, 3 and 4** – in Flagstaff, Scottsdale and Tucson, respectively. This is an opportunity for DMOs, attractions and hotels to learn from AOT's seven in-market international representatives about the latest visitor trends and statistics to ensure that your promotional efforts are effectively reaching your target market. For more information, contact Kristin Swanson at 602-364-3696 or via email at kswanson@azot.gov.

Upcoming Events & Activities

[Feira de Turismo de Gramado](#)

Date: November 6- 9

Locations: Gramado, Rio Sul, Brazil

[China International Travel Mart](#)

Date: November 14 -16

Locations: Shanghai, China

[Arizona Media Marketplace](#)

Date: November 20

Locations: Scottsdale

Industry News

SAVE the DATE: As The World Trades II

The Transportation and Trade Corridor Alliance presents: As the World Trades II: Arizona's Place in the Global Economy Featuring Companies from Israel and Canada

This event will be an interactive forum on Trade, Transportation, and Competitiveness featuring the following speakers: Gene Seroka, Executive Director Port of Los Angeles. Glenn Williamson, CEO and Founder of Canada Arizona Business Council. Bruce Wright, Associate Vice President Tech Parks Arizona University of Arizona.

What is the TTCA? Tasked by the Governor of Arizona, the Arizona Department of Transportation (ADOT), collaboratively with the Arizona Mexico Commission (AMC) and Arizona Commerce Authority (ACA), brings together the public and private sector, state and local governments, planning organizations, transportation and logistics companies, port authorities and other relevant stakeholders to assess current and potential opportunities for job creation, attracting new investment and fostering growth.

When: Nov. 6

Time: 3:30 PM - 5:30 PM

Where: Sheraton Phoenix Downtown, 340 N. 3rd Street, Phoenix, AZ 85004

For more information, visit www.azmc.org.

By The Numbers: International Travel Is Booming

Americans are traveling internationally in big numbers this year, bolstered perhaps by a new economic confidence based on such improving news as the recent reports from the independent Congressional Budget Office (CBO) that show the national deficit from the fiscal year ending on Sept. 30 was \$486 billion — \$195 billion less than the previous year. That, according to Forbes Magazine is the lowest since 2008.

Just as when both the economy and overseas travels followed parallel trajectories down in the aftermath of the 2008 economic collapse, so too has the trajectory climbed a parallel path with their improvements. Last December, the Department of Commerce's (DOC) National Travel & Tourism Office's (NTTO) annual report found that after four years of slumping in the wake of the

2008 economic crash, American travel abroad was on the upswing. In 2013 U.S. residents made 60.7 million foreign trips (including Canada and Mexico), up from 59.2 million in 2012. Between 2007 and 2011, the number of U.S. residents traveling abroad fell from 64.1 million to 59.2 million. Overseas travel by Americans rose by 5 percent to 28.5 million in 2012 – faster than travel to Canada or Mexico.

The latest NTTO figures are even more positive. These numbers focus on international travel by Americans both in June and in the Year to Date through June. And it wasn't a half-year fling as another study by D.K. Shifflet & Associates suggest that the autumn will be strong also.

Overall, American travel internationally was up 10 percent in June 2014 compared to June 2013. Some 7.3 million American travelers took to the road in June and 32.6 million traveled internationally through the first six months of 2014. Comparing June 2014 to June 2013 in travel overseas by Americans (meaning international travel not to Mexico or Canada) finds a 7 percent increase, or some 3.6 million travelers. It was up 6 percent for the year to 15.4 million overseas travelers.

The numbers in the sidebar show which destinations welcomed the most travelers internationally. And if you're curious about "non-overseas international travel" Travel to Canada and Mexico for the year through June was up 14 percent to 17.2 million. Mexico, received 2.2 million American travelers, up 23 percent; and air travel (708,000) was up 14 percent, while Canada received 1.5 million American travelers, down 1 percent.

NTTA reported the through June market share of the US travel market to overseas destinations, which is 47 percent of U.S. international travel, this way: Europe, a 17 percent share; Caribbean, 12 percent; Asia, 7 percent; Central America, 5 percent; South America, 3 percent; Middle East, 3 percent; Oceania, 1 percent; and Africa, 1 percent. Other North American markets received 53 percent of all U.S. international outbound travel: Mexico had a 38 percent share and Canada 15 percent.

In August D.K. Shifflet & Associates released findings from a July survey that suggested Baby Boomers had the largest increases over 2013 and they along with GI/Silents (born 1925 to 1942) are the most likely to travel with about six out of 10 planning to travel at least once this fall. The number of Millennials planning to travel this year is about the same as last year.

"It's not all about Millennials," said Chris Klauda, vice president at D.K. Shifflet & Associates. "Older travelers are alive and well and continue traveling for leisure. Older travelers have a more flexible schedule and more disposable income which provides plenty of free time and money to travel. Increased revenue will come to travel marketers who can convince mature Americans to travel to their destinations, hotels and attractions with a great offering." (*Travel Pulse, Oct. 15*)

IATA - Global Passenger Numbers Are Expected to Reach 7.3 Billion by 2034

The International Air Transport Association (IATA) released its first 20-year passenger growth forecast, projecting that passenger numbers are expected to reach 7.3 billion by 2034. That represents a 4.1% average annual growth in demand for air connectivity that will result in more than a doubling of the 3.3 billion passengers expected to travel this year.

Among the highlights of the report is the expectation that China will overtake the United States as the world's largest passenger market (defined by traffic to, from and within) by 2030. Both markets, however, are expected to remain the largest by a wide margin. In 2034 flights to, from and within China will account for some 1.3 billion passengers, 856 million more than 2014 with an average annual growth rate of 5.5%. Traffic to, from and within the US is expected to grow at an average annual growth rate of 3.2% that will see 1.2 billion passengers by 2034 (559 million more than 2014).

The report, the first from the new IATA Passenger Forecasting service, produced in association with Tourism Economics, analyzes passenger flows across 4,000 country pairs for the next 20 years, forecasting passenger numbers by way of three key demand drivers: living standards, population and demographics, and price and availability.

Future Growth Trend Highlights:

- By 2034 the five fastest-increasing markets in terms of additional passengers per year will be China (856 million new passengers per year), the US (559 million), India (266 million), Indonesia (183 million) and Brazil (170 million).
- Eight of the ten fastest-growing markets in percentage terms will be in Africa with Central African Republic, Madagascar, Tanzania, Burundi and Kuwait making up the five fastest-growing markets.
- In terms of country-pairs, Asian and South American destinations will see the fastest growth, reflecting economic and demographic growth in those markets. Intra-Pakistan, Kuwait-Thailand, United Arab Emirates (UAE)-Ethiopia, Colombia-Ecuador and intra-Honduras travel will all grow by at least 9.5% on average for the next 20 years, while Indonesia-East Timor will be the fastest growing pair of all, at 14.9%. (*Travel Industry Wire, Oct. 20*)

Working For Free: U.S. Workforce Forfeits \$52.4 Billion in Time Off Benefits Annually

American workers permanently lost a total of 169 million days of paid time off (PTO) across the workforce in 2013, according to a new analysis, "All Work and No Pay: The Impact of Forfeited Time Off." These days could not be rolled over, could not be paid out, were not banked or used for any other benefit.

Conducted by Oxford Economics for the U.S. Travel Association's Travel Effect initiative, the study shows that by forfeiting this time American employees surrender \$52.4 billion in benefits. That puts the value of a forgone day, where workers are providing free labor for their employers, at an average of \$504 per employee.

"Americans are taking the value of their time for granted. By passing on vacation days and working instead, U.S. employees are serving as volunteers for their companies," said Adam Sacks, founder and president of Oxford Economics' Tourism Economics division. "We discovered that this forfeited time has substantial individual, national and economic implications."

The analysis also highlights trends in American vacation habits. Notably, Americans are taking less vacation time than at any point in nearly the last four decades. In 2013, employees took an average of 16 days of vacation compared to an average of 20.3 days as recently as 2000.

“If this trend continues, the vacations of our childhoods could be a thing of the past—completely unknown by the next generation. That would be a true loss for our families and our country,” said Roger Dow, president and CEO of the U.S. Travel Association.

The economic potential of returning to the pre-2000 vacation patterns is massive: annual vacation days taken by U.S. employees would jump 27 percent (or 768 million days), delivering a \$284 billion impact across the entire U.S. economy.

Contrary to popular opinion, more time at the office does not correlate with a raise or bonus. In fact, employees who left 11-15 days unused are less likely (by 6.5 percent) to receive a raise or bonus than those who used all of their vacation days.

Employees who leave the most PTO unused are also more stressed. Americans who leave 11 days or more unused reported being “very” or “extremely” stressed with their work lives, compared to those who left less time on the table or took all their PTO (31 percent vs. 25 percent).

“America’s work martyrs aren’t more successful. We need to change our thinking. All work and no play is not going to get you ahead—it’s only going to get you more stress,” Dow added.

Report Methodology

Oxford Economics’ analysis is based on the Monthly Current Population Survey results reported by the U.S. Bureau of Labor Statistics (BLS) and a June 2014 survey of 1,303 American workers conducted by GfK Public Affairs and Corporate Communications in conjunction with Oxford Economics. The BLS data compiles long-term vacation activity, while the GfK results indicate average vacation days taken. By combining the two data sources, Oxford Economics determined long-term, historical vacation activity among American workers.

About Travel Effect

Travel Effect is the U.S. Travel Association’s research-driven initiative to prove the personal, business, social and economic benefits that taking earned time off can deliver. For more information about survey findings, visit www.TravelEffect.com. (*Travel Industry Wire, Oct. 22*)

Calendar of Events

Visit www.ArizonaGuide.com to find information on all the exciting [events, festivals and activities](#) held throughout the Grand Canyon State!

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