International Visitation to Arizona

Presenting YE 2018 Data
Agenda

• Trends
• Overseas Visitor Profile
• Canadian Visitor Profile
• 2019 so far
International Trends

Arizona

Source: Tourism Economics
## Visitation by Country (‘000)

<table>
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</table>

*Thousand visits*
**Visitation Rank**

1. California: 18,141
2. New York: 16,649
3. Florida: 13,485
4. Texas: 8,706
5. Nevada: 6,071
6. Arizona: 5,899
7. Washington: 4,610
8. Hawaii: 3,760
9. Massachusetts: 2,694
10. Michigan: 2,465
11. Illinois: 2,427
12. District Of Columbia: 2,162
13. Pennsylvania: 1,916
14. New Jersey: 1,537
15. Georgia: 1,396

Source: Tourism Economics
Spending Rank

California: $28,300
New York: $26,686
Florida: $26,444
Hawaii: $12,250
Texas: $7,655
Nevada: $7,610
Massachusetts: $5,638
Washington: $5,088
Arizona: $4,536
Illinois: $4,087
New Jersey: $2,646
Michigan: $2,334
District Of Columbia: $2,158
Georgia: $2,049
Virginia: $1,983

Source: Tourism Economics
Arizona’s Market Share

Share of International Visitation in the U.S.

Source: Tourism Economics
Visitation Growth 2013-2018

- California: 16%
- New York: 16%
- Florida: 9%
- Texas: 19%
- Nevada: 1%
- Arizona: 1%
- Washington: 10%
- Hawaii: 0%
- Massachusetts: 19%
- Michigan: 1%
- Illinois: 1%
- District Of Columbia: 15%
- Pennsylvania: 4%
- New Jersey: 4%
- Georgia: 13%

Source: Tourism Economics
Visitor Spend by Country

Source: Tourism Economics, 2018
Overseas Spending Trend

Source: Tourism Economics
Average Spend per Visitor

Source: Tourism Economics, 2018
Visitor Profile
Data Sources

**Overseas**
Survey of International Air Travelers, NTTO

**Canada**
XBorder Canada
Travel Paths
Port of Entry

France

San Francisco 16%
Los Angeles 67%

Source: Survey of International Air Travelers, NTTO
Destinations Visited in Arizona

France

- Flagstaff-Grand Canyon-Sedona: 84%
- Phoenix: 15%
- Tucson: 1.5%

Source: Survey of International Air Travelers, NTTO
Where do visitors spend the most?

Source: VisaVue Travel, 2018
Other Destinations Visited

France

San Francisco 54%
Los Angeles 75%
Phoenix 15%
Las Vegas 77%
Flagstaff-Grand Canyon-Sedona 84%
New York 7%
Port of Entry
China/Hong Kong/Taiwan

- Los Angeles: 50%
- San Francisco: 23%
- Seattle: 4.8%
- New York: 5%

Source: Survey of International Air Travelers, NTTO
Destinations Visited in Arizona
China/Hong Kong/Taiwan

- Flagstaff-Grand Canyon-Sedona: 58%
- Phoenix: 32%
- Tucson: 7.5%

Source: Survey of International Air Travelers, NTTO
Where do visitors spend the most?

Source: VisaVue Travel, 2018
Other Destinations Visited
China/Hong Kong/Taiwan

San Francisco 32%
Los Angeles 49%
Las Vegas 46%
San Diego 12%
New York 16%

Source: Survey of International Air Travelers, NTTO
Port of Entry
Germany

- Los Angeles: 35%
- San Francisco: 16%
- New York: 4%
- Newark: 4%
- Seattle: 2.3%
- Las Vegas: 10%
- Denver: 6%
- Chicago: 6%

Source: Survey of International Air Travelers, NTTO

*Passengers on the Phoenix to Frankfurt route are not included in this data.*
Destinations Visited in Arizona

Germany

- Flagstaff-Grand Canyon-Sedona 70%
- Phoenix 22%
- Tucson 7.7%

Source: Survey of International Air Travelers, NTTO

*Passengers on the Phoenix to Frankfurt route are not included in this data.*
Where do visitors spend the most?

Source: VisaVue Travel, 2018

GERMANY

- North Central: 6%
- Northern: 7%
- Phoenix & Central: 5%
- Tucson & Southern: 38%
- West Coast: 44%
Other Destinations Visited

Germany

San Francisco 51%
Las Vegas 62%
Los Angeles 62%
San Diego 19%
New York 9%

Source: Survey of International Air Travelers, NTTO
*Passengers on the Phoenix to Frankfurt route are not included in this data.
Port of Entry
Italy

Source: Survey of International Air Travelers, NTTO
Destinations Visited in Arizona

Italy

- Phoenix: 11%
- Flagstaff-Grand Canyon-Sedona: 80%
- Tucson: 3.4%

Source: Survey of International Air Travelers, NTTO

*Passengers on the Phoenix to Frankfurt route are not included in this data.
Where do visitors spend the most?

Source: VisaVue Travel, 2018
Other Destinations Visited

Italy

San Francisco 60%
Las Vegas 77%
Los Angeles 72%
San Diego 15%
New York 13%

Source: Survey of International Air Travelers, NTTO
Port of Entry
Japan

Los Angeles 39%
San Francisco 28%
Las Vegas 5.5%
New York 1.8%
Dallas 6%
Chicago 2.1%

Source: Survey of International Air Travelers, NTTO
Destinations Visited in Arizona

Phoenix 51%
Flagstaff-Grand Canyon-Sedona 58%
Tucson 3.6%

Source: Survey of International Air Travelers, NTTO

*Passengers on the Phoenix to Frankfurt route are not included in this data.
Where do visitors spend the most?

Source: VisaVue Travel, 2018
Other Destinations Visited

Japan

San Francisco: 8%
Las Vegas: 39%
Los Angeles: 24%
San Diego: 15%
New York: 3%

Source: Survey of International Air Travelers, NTTO
Port of Entry
United Kingdom

Los Angeles 22%
San Francisco 9.2%
Las Vegas 20%
Chicago 3.5%
New York 10%
Philadelphia 4.5%

*23% reported “Other” airport, which may include PHX

Source: Survey of International Air Travelers, NTTO
Destinations Visited in Arizona

United Kingdom

- Flagstaff-Grand Canyon-Sedona: 63%
- Phoenix: 42%
- Tucson: 6.2%

Source: Survey of International Air Travelers, NTTO

*Passengers on the Phoenix to Frankfurt route are not included in this data.
Where do visitors spend the most?

Source: VisaVue Travel, 2018

- United Kingdom: 64%
- North Central: 16%
- Northern: 6%
- Phoenix & Central: 9%
- Tucson & Southern: 5%
- West Coast: 5%
Other Destinations Visited
United Kingdom

San Francisco 27%
Las Vegas 54%
Los Angeles 35%
San Diego 12%
Chicago 7%
New York 11%
Washington D.C. 7%

Source: Survey of International Air Travelers, NTTO
Arizona was the Main Destination

Source: Survey of International Air Travelers, NTTO
Main Purpose of Trip

Source: Survey of International Air Travelers, NTTO
Trip Planning Sources

Source: Survey of International Air Travelers, NTTO
Trip Planning Sources

Source: Survey of International Air Travelers, NTTO
Is this trip part of a prepaid tour package?

Source: Survey of International Air Travelers, NTTO
Is this trip part of a prepaid tour package?

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

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Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Month of Return Flight

Source: Survey of International Air Travelers, NTTO
Leisure Activities

Source: Survey of International Air Travelers, NTTO
Leisure Activities

Source: Survey of International Air Travelers, NTTO
Leisure Activities

Source: Survey of International Air Travelers, NTTO
Leisure Activities

Source: Survey of International Air Travelers, NTTO
Demographics
Age Distribution

United Kingdom

France

Germany

Italy

Source: Survey of International Air Travellers; NTTO
Age Distribution

**China/Hong Kong/Taiwan**

- 18 - 24 Years: Male 18%, Female 2%
- 25 - 29 Years: Male 20%, Female 12%
- 30 - 34 Years: Male 6%, Female 14%
- 35 - 39 Years: Male 8%, Female 16%
- 40 - 44 Years: Male 8%, Female 20%
- 45 - 49 Years: Male 6%, Female 10%
- 50 - 54 Years: Male 4%, Female 4%
- 55 - 64 Years: Male 2%, Female 2%
- 65 or More Years: Male 0%, Female 2%

**Australia/New Zealand**

- 18 - 24 Years: Male 10%, Female 8%
- 25 - 29 Years: Male 16%, Female 12%
- 30 - 34 Years: Male 6%, Female 4%
- 35 - 39 Years: Male 14%, Female 12%
- 40 - 44 Years: Male 12%, Female 10%
- 45 - 49 Years: Male 8%, Female 6%
- 50 - 54 Years: Male 6%, Female 4%
- 55 - 64 Years: Male 4%, Female 2%
- 65 or More Years: Male 2%, Female 0%

**Japan**

- 18 - 24 Years: Male 12%, Female 4%
- 25 - 29 Years: Male 10%, Female 8%
- 30 - 34 Years: Male 6%, Female 4%
- 35 - 39 Years: Male 14%, Female 12%
- 40 - 44 Years: Male 16%, Female 14%
- 45 - 49 Years: Male 12%, Female 10%
- 50 - 54 Years: Male 8%, Female 6%
- 55 - 64 Years: Male 6%, Female 4%
- 65 or More Years: Male 2%, Female 2%

Source: Survey of International Air Travelers, NTTO
Income Distribution

Source: Survey of International Air Travelers, NTTO
Income Distribution

Source: Survey of International Air Travelers, NTTO
Canadian Visitation
Canadian Visitation to Arizona

Source: Tourism Economics
AZ Share of Canadian Visitation

Overnight Share

Source: Xborder Canada, 2018
Children Under 18 at Home

Yes 40%

No 60%

Source: Xborder Canada, 2018
Employment

- 42% Work mostly full time (30+ hours/week, most weeks) (including self-employed)
- 34% Work mostly part time (less than 30 hours a week or not the full year)
- 24% Did not work

Source: Xborder Canada, 2018
Time from Decision to Departure

Source: Xborder Canada, 2018
Month Trip Began

Source: Xborder Canada, 2018
Accommodations

- Private home of friend/family: 24%
- Hotel/Motel: 40%
- Bed and Breakfast (B&B): 1%
- Shared Economy (AirBnB, VRBO, HomeAway, etc): 13%
- Your second home/condo: 3%
- Timeshare: 5%
- RV/Campground/Tent: 9%
- Other Accommodation Type: 5%

Source: Xborder Canada, 2018
Sampling Plan
What was the primary purpose of this visit to Arizona?

(Select ONE category, probe as necessary)

- Visiting Friends/Family
- Leisure/Personal/Social
- Business/Work/Professional
- Medical/Healthcare
- Shopping
- School
- Professional Sports/Attend Game (Spring Training/Cardinals/Suns/DBacks/Coyotes/Golf Event, etc)
- Play Sports/Watch Kids Sports (Club/Rec/School/Social)
- Other (Specify)

¿Cuál es su principal propósito para vistar Arizona?

(Nota: Seleccione UNA categoría y pruebe según sea necesario)

- Visitar amigos / Familia
- Ocio / Personal / Social
- Negocios / Trabajo / Profesional
- Medicina / Salud
- Compras
- Escuela
- Deportes Profesionales / Asistir juego (entrenamiento de primavera / Los D-Backs / Los Suns / Los Cardinals / Los Coyotes / evento de golf, etc.)
- Deportes / Ver Deportes Infantiles (Club / Grabar / Escolar / Social)
- Otro (Especifica)
Project Timeline

Data Collection: June 2019-May 2020

Data Processing & Economic Impact Analysis: June-July 2020

Tentative Report Delivery: August 2020
2019 Year-to-Date
Arrivals to U.S.
% Change YTD July 2019*

Source: National Travel and Tourism Office   *Canada arrivals are YTD June 2019
Canadian Deplanements
YTD August 2019

<table>
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<th>Jan-Aug</th>
<th>2018</th>
<th>2019</th>
<th>% Change</th>
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<tr>
<td>Calgary</td>
<td>89,136</td>
<td>93,753</td>
<td>5.2%</td>
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<td>Edmonton</td>
<td>43,665</td>
<td>35,449</td>
<td>-18.8%</td>
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<td>Kelowna</td>
<td>3,823</td>
<td>3,585</td>
<td>-6.2%</td>
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<td>Montreal</td>
<td>5,241</td>
<td>10,115</td>
<td>93.0%</td>
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<tr>
<td>Regina</td>
<td>6,925</td>
<td>7,029</td>
<td>1.5%</td>
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<td>Saskatoon</td>
<td>6,997</td>
<td>7,357</td>
<td>5.1%</td>
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<td>Toronto</td>
<td>60,781</td>
<td>60,211</td>
<td>-0.9%</td>
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<td>Vancouver</td>
<td>95,268</td>
<td>76,098</td>
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<td>Winnipeg</td>
<td>10,144</td>
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<td><strong>Subtotal PHX</strong></td>
<td><strong>321,980</strong></td>
<td><strong>303,486</strong></td>
<td><strong>-5.7%</strong></td>
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<td><strong>Subtotal AZA</strong></td>
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<td><strong>70.7%</strong></td>
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<td><strong>TOTAL</strong></td>
<td>328,359</td>
<td>314,373</td>
<td>-4.3%</td>
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Visa Spending
Q1 and Q2, 2019

January-March

Top $ Countries Y/Y $ Growth

- CANADA: -9.4%
- MEXICO: 0.5%
- CHINA: 14.2%
- UNITED KINGDOM: 4.9%
- JAPAN: -5.3%
- AUSTRALIA: -1.0%
- GERMANY: -6.6%
- FRANCE: -0.3%
- SOUTH KOREA: 35.6%
- INDIA: -0.1%

April-June

Top $ Countries Y/Y $ Growth

- CANADA: -7.0%
- MEXICO: 18.3%
- CHINA: -7.3%
- GERMANY: 5.2%
- UNITED KINGDOM: -10.5%
- FRANCE: -10.5%
- JAPAN: 14.6%
- AUSTRALIA: -2.8%
- PUERTO RICO: 15.2%
- SWITZERLAND: -2.8%

Source: VisaVue Travel
Thank You!

Colleen Floyd

cfloyd@tourism.az.gov

www.tourism.az.gov