# International Visitation to Arizona

Presenting YE 2018 Data



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## Agenda

- Trends
- Overseas Visitor Profile
- Canadian Visitor Profile
- 2019 so far



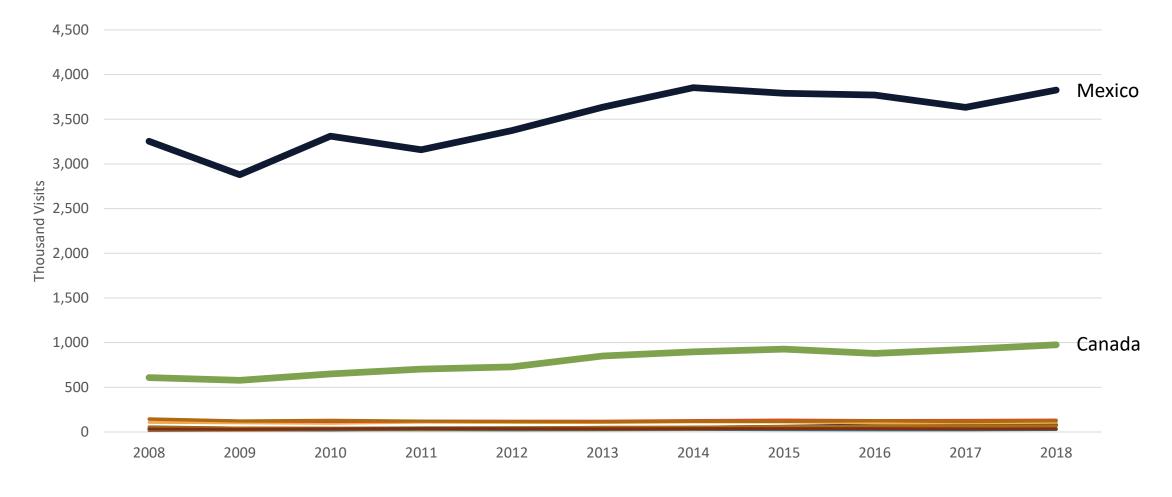
## International Trends

Arizona



Source: Tourism Economics

### Visitation Trend



Source: Tourism Economics

ARIZONA

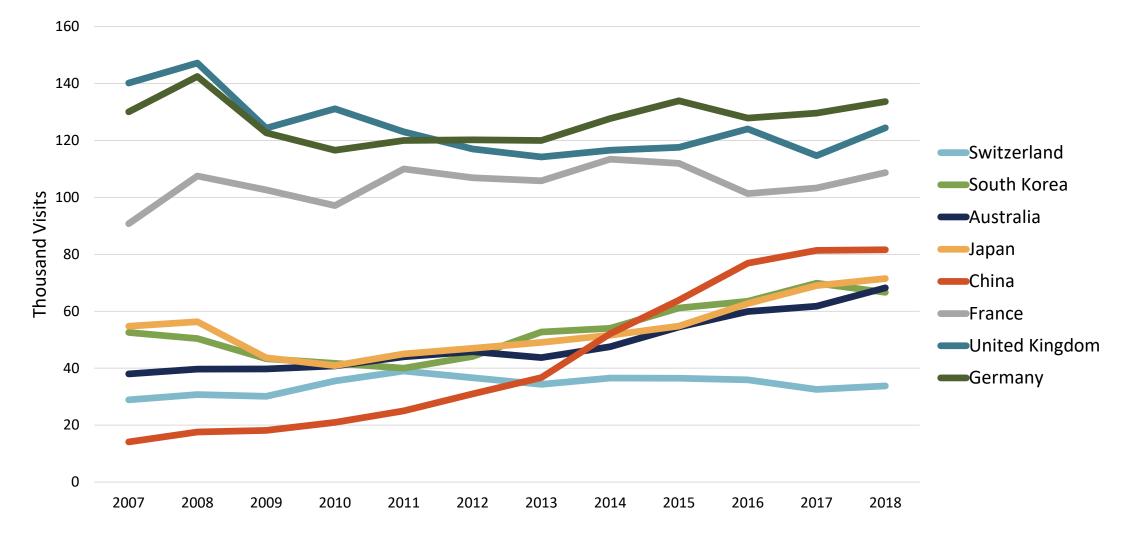
## Visitation by Country ('000)

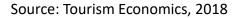
Origin market	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Australia	40	40	41	44	46	44	48	54	60	62	68
Canada	609	579	650	704	728	850	896	928	879	924	975
China	18	18	21	25	31	37	52	64	77	81	82
France	108	103	97	110	107	106	113	112	101	103	109
Germany	142	123	117	120	120	120	128	134	128	130	134
India	23	21	21	20	21	23	25	27	29	29	32
Italy	32	30	26	29	26	27	29	25	24	25	28
Japan	56	44	41	45	47	49	52	55	63	69	71
Mexico	3,255	2,879	3,310	3,159	3,374	3,636	3,854	3,791	3,771	3,633	3,827
South Korea	50	43	42	40	44	53	54	61	64	70	67
Switzerland	31	30	36	39	37	34	37	37	36	33	34
United Kingdom	147	124	131	123	117	114	117	118	124	115	124

\*Thousand visits



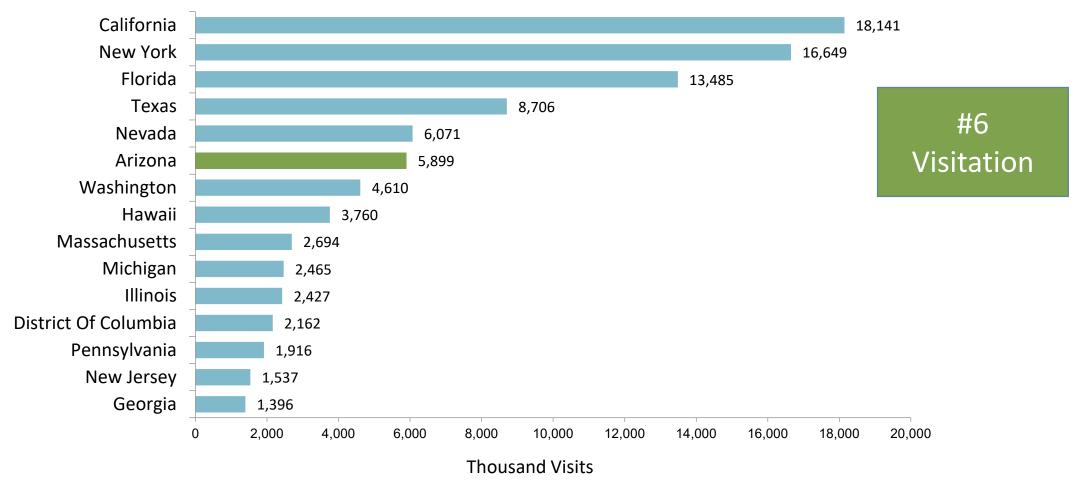
#### **Overseas Visitation**

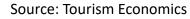






#### **Visitation Rank**

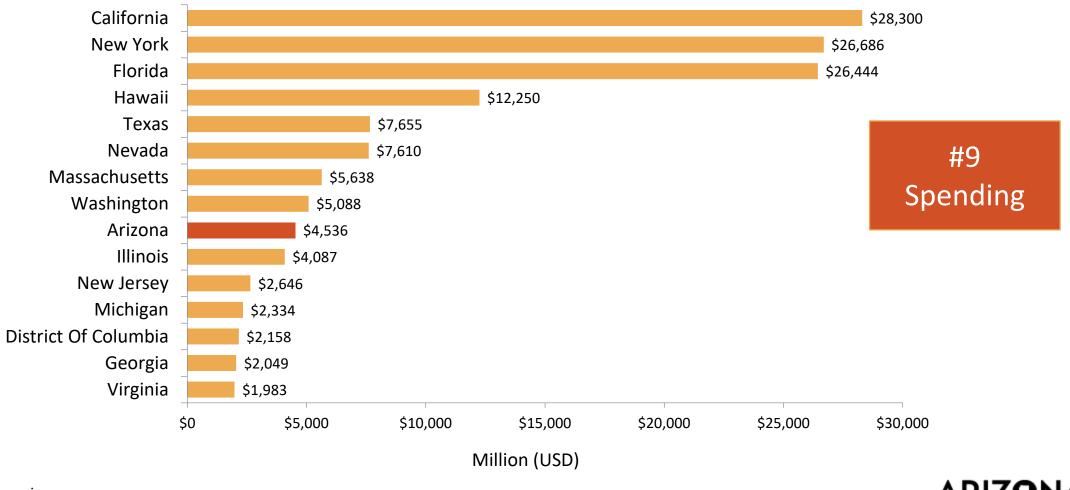






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## Spending Rank

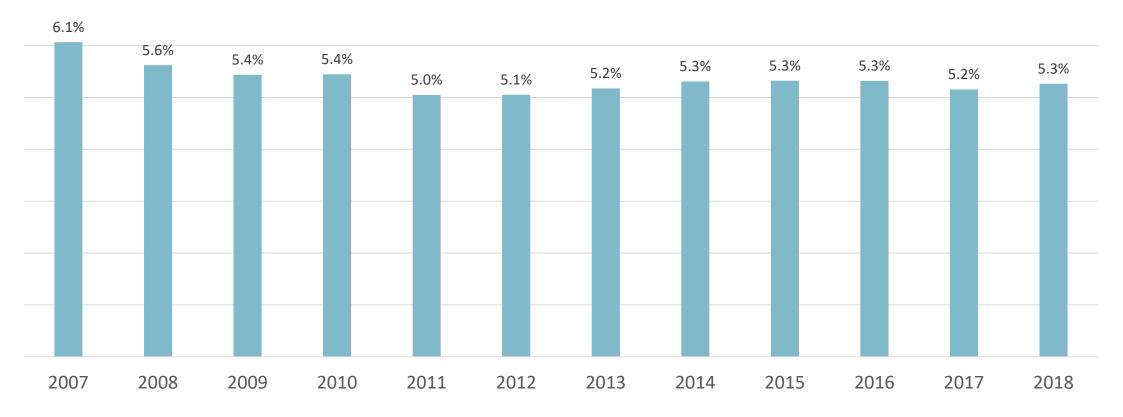


Source: Tourism Economics

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#### Arizona's Market Share

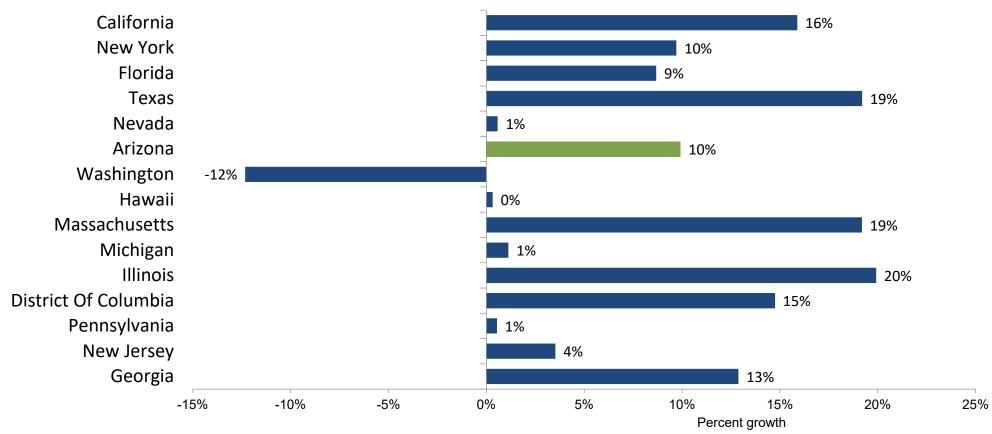
Share of International Visitation in the U.S.



Source: Tourism Economics



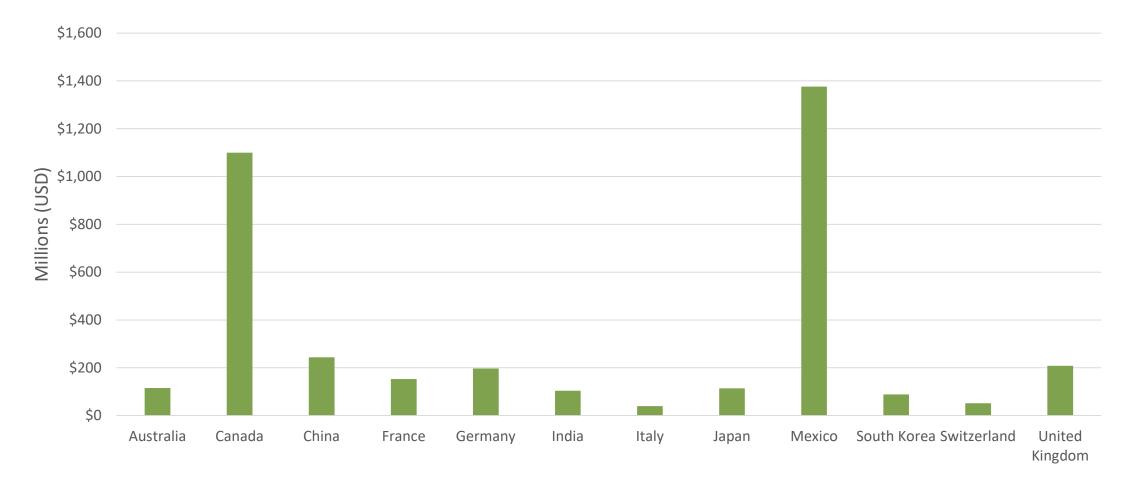
#### Visitation Growth 2013-2018



Source: Tourism Economics



### Visitor Spend by Country

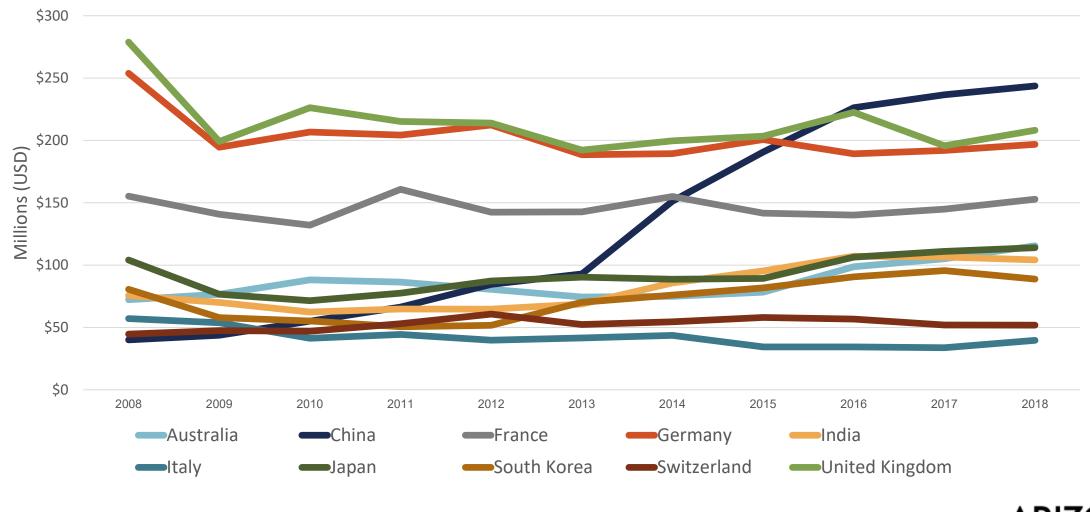


Source: Tourism Economics, 2018

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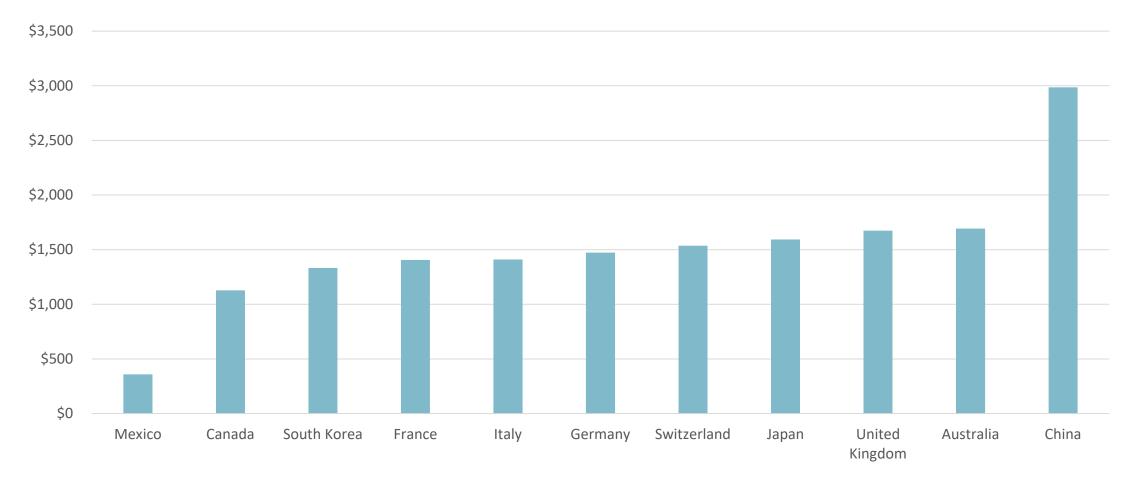


#### **Overseas Spending Trend**



Source: Tourism Economics

## Average Spend per Visitor



Source: Tourism Economics, 2018





# Visitor Profile



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#### **Data Sources**

Overseas

Survey of International Air Travelers, NTTO



#### Canada

XBorder Canada





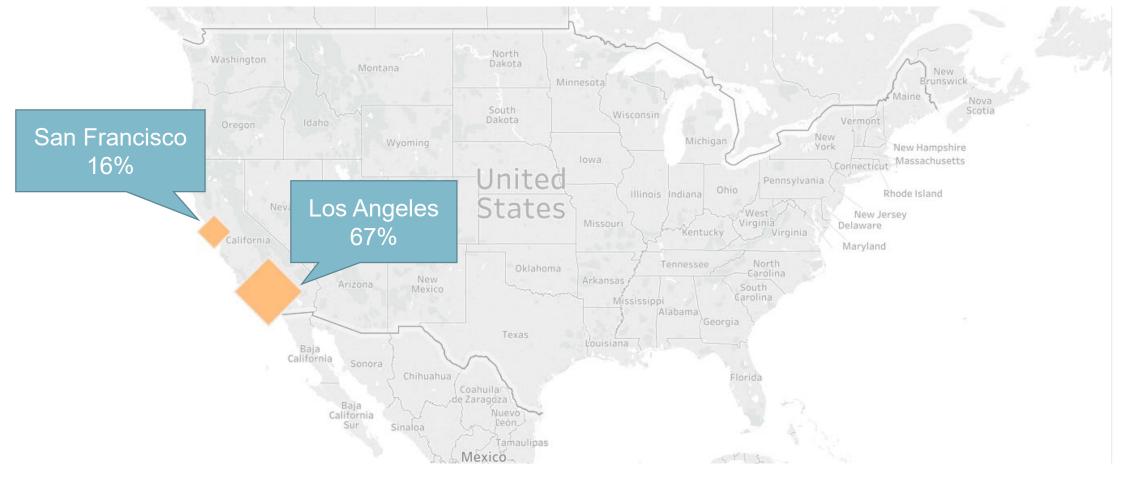


## **Travel Paths**





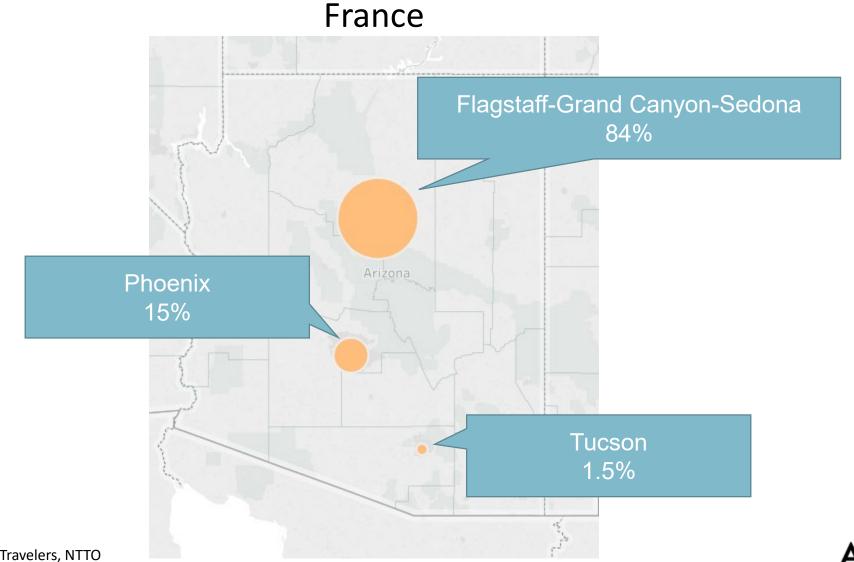
#### Port of Entry France



Source: Survey of International Air Travelers, NTTO



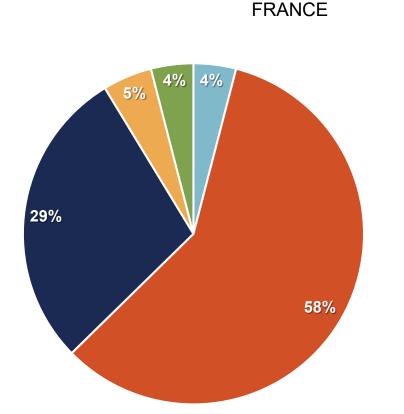




Source: Survey of International Air Travelers, NTTO

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### Where do visitors spend the most?



North Central

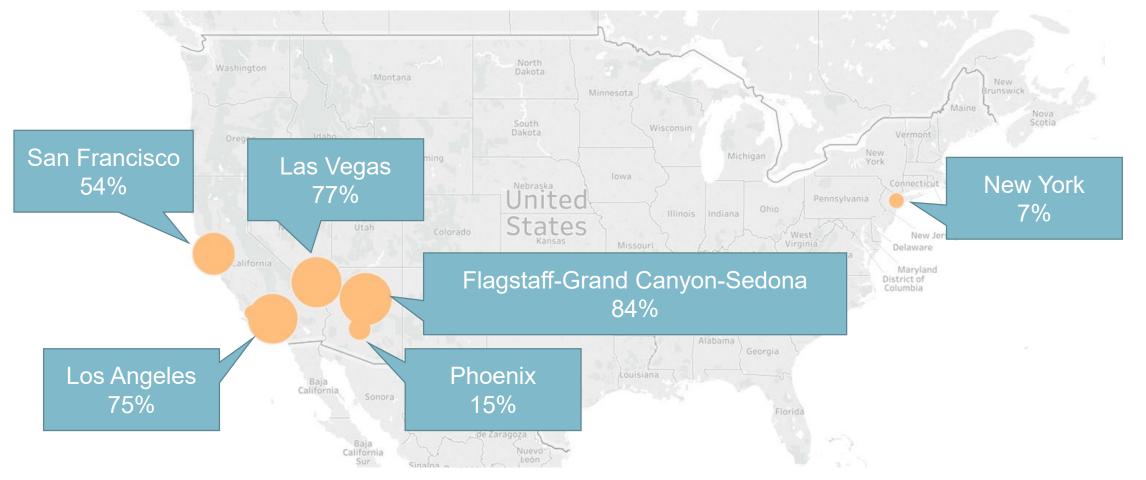
- Northern
- Phoenix & Central
- Tucson & Southern
- West Coast



Source: VisaVue Travel, 2018

#### Other Destinations Visited France

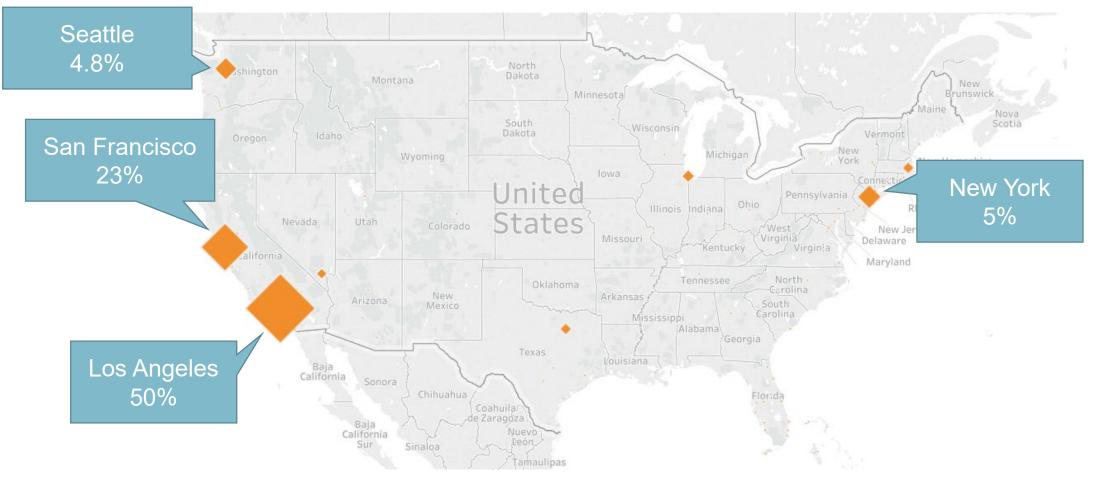
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ARIZONA



#### **Port of Entry** China/Hong Kong/Taiwan



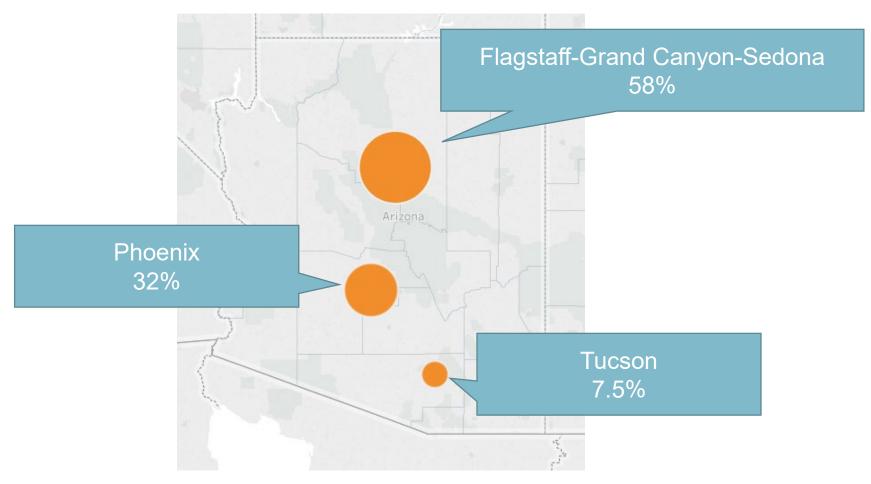


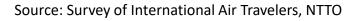
Source: Survey of International Air Travelers, NTTO



## Destinations Visited in Arizona

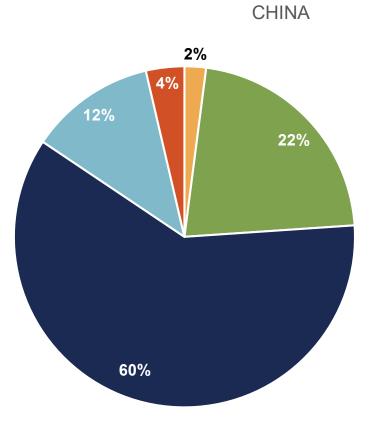
#### China/Hong Kong/Taiwan







### Where do visitors spend the most?

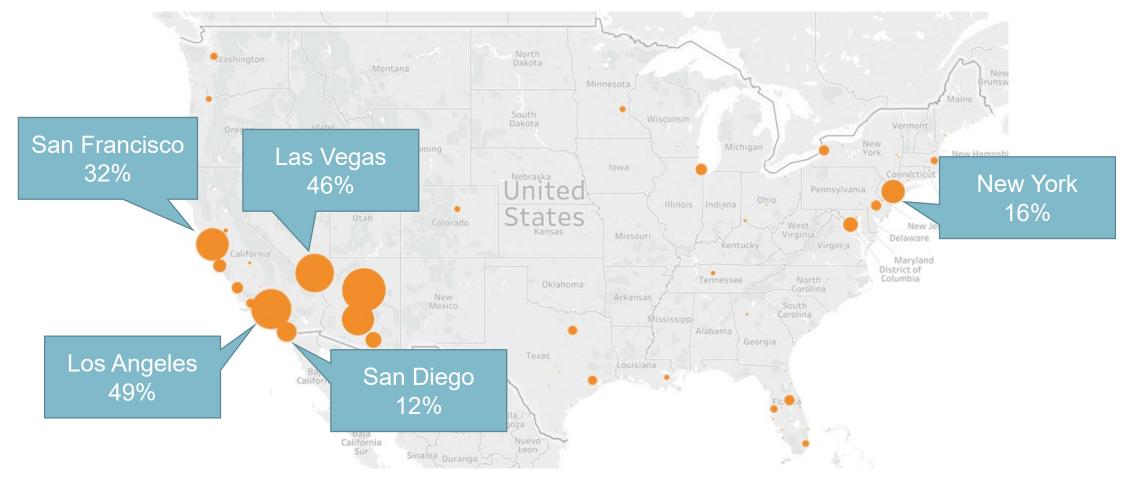






Source: VisaVue Travel, 2018





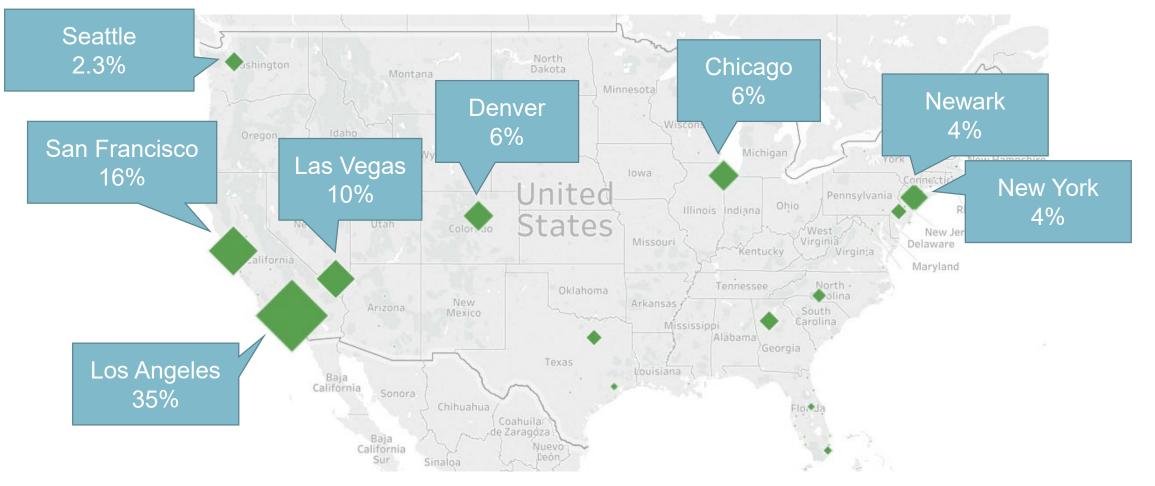


Source: Survey of International Air Travelers, NTTO

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#### Port of Entry Germany



Source: Survey of International Air Travelers, NTTO

\*Passengers on the Phoenix to Frankfurt route are not included in this data.



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## **Destinations Visited in Arizona** Germany Flagstaff-Grand Canyon-Sedona 70% Arizona Phoenix

Phoenix 22% Tucson 7.7%

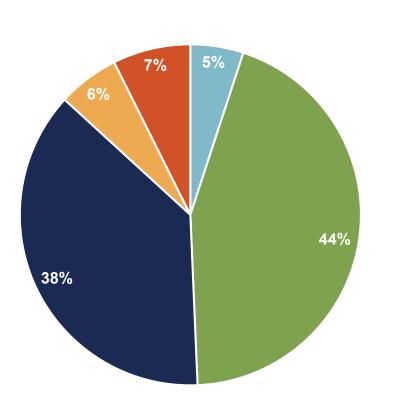
Source: Survey of International Air Travelers, NTTO

\*Passengers on the Phoenix to Frankfurt route are not included in this data.



### Where do visitors spend the most?

GERMANY

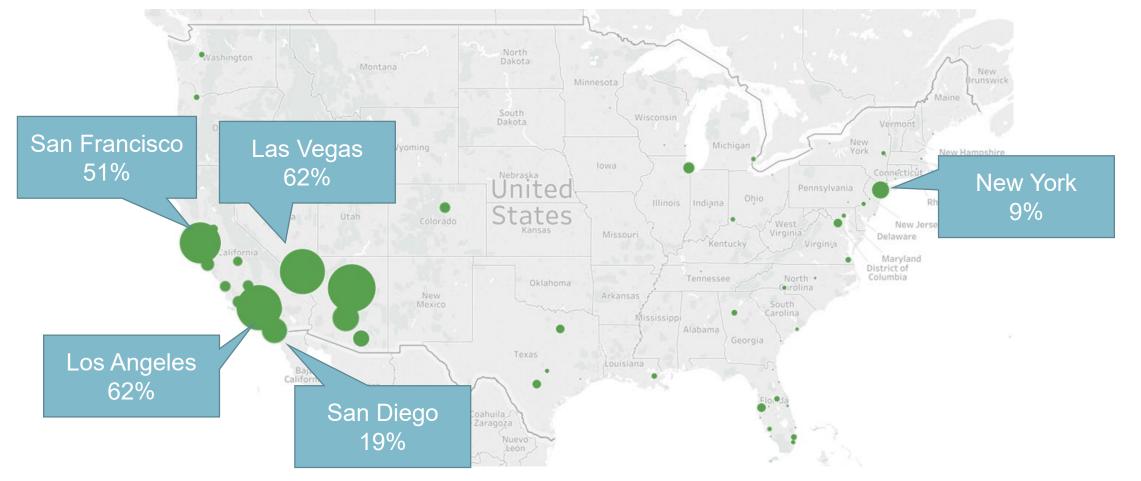


- North Central
- Northern
- Phoenix & Central
- Tucson & Southern
- West Coast



Source: VisaVue Travel, 2018

#### Other Destinations Visited Germany



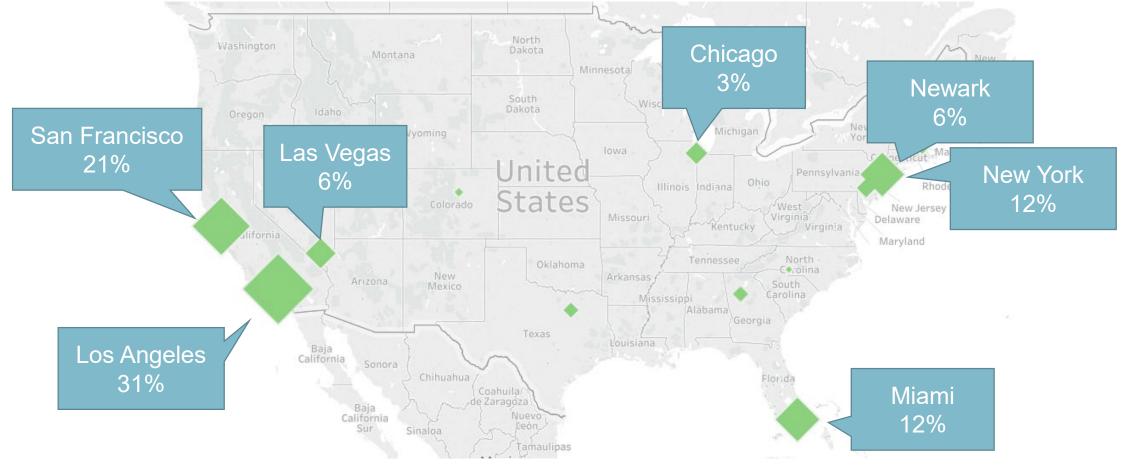
Source: Survey of International Air Travelers, NTTO

\*Passengers on the Phoenix to Frankfurt route are not included in this data.





#### Port of Entry Italy

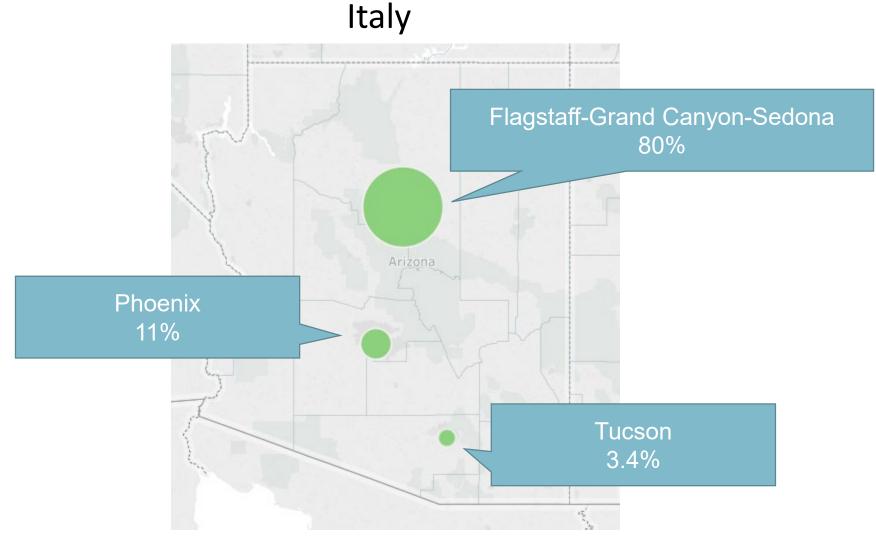


Source: Survey of International Air Travelers, NTTO





## Destinations Visited in Arizona

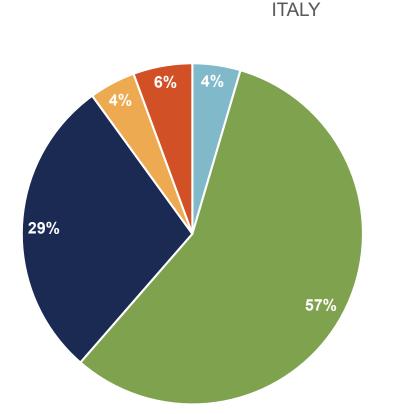


Source: Survey of International Air Travelers, NTTO

\*Passengers on the Phoenix to Frankfurt route are not included in this data.



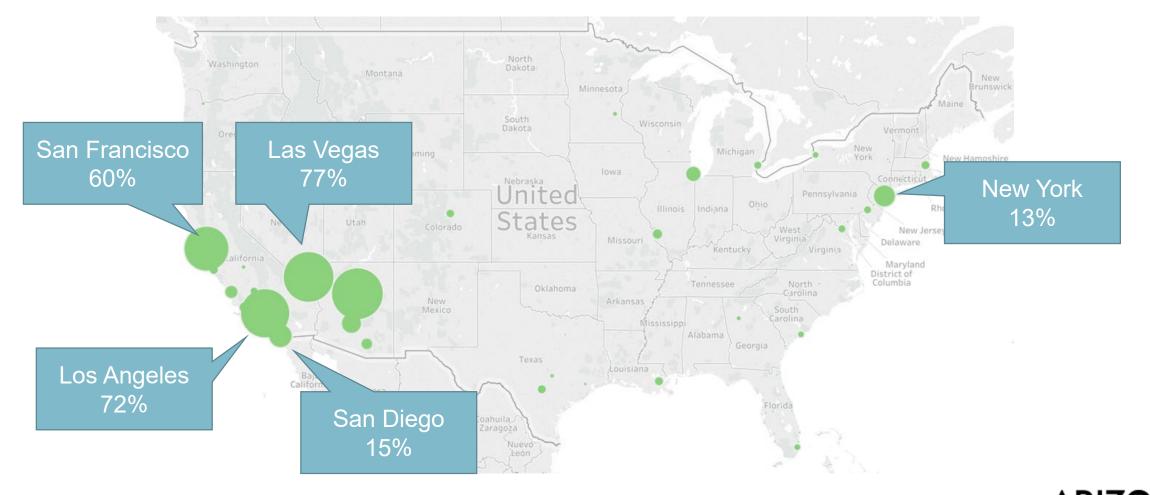
### Where do visitors spend the most?



- North Central
- Northern
- Phoenix & Central
- Tucson & Southern
- West Coast



# Other Destinations Visited

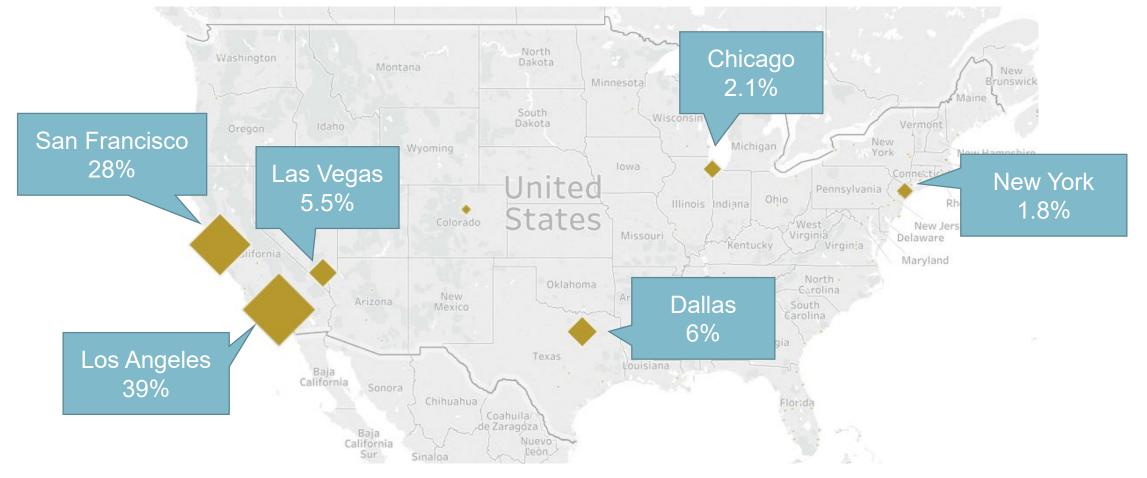


Source: Survey of International Air Travelers, NTTO

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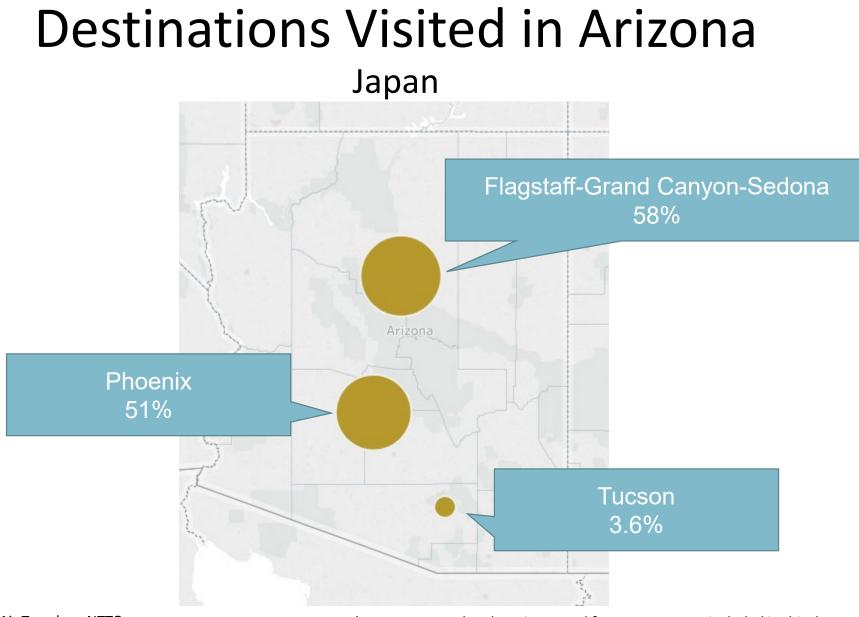


#### Port of Entry Japan





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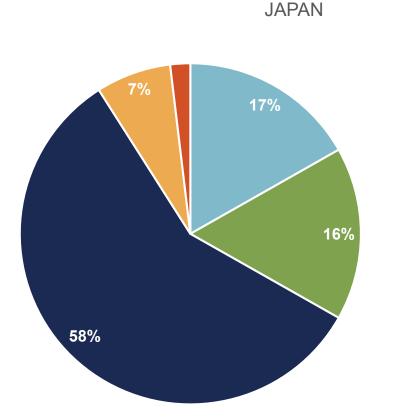


Source: Survey of International Air Travelers, NTTO

\*Passengers on the Phoenix to Frankfurt route are not included in this data.



### Where do visitors spend the most?



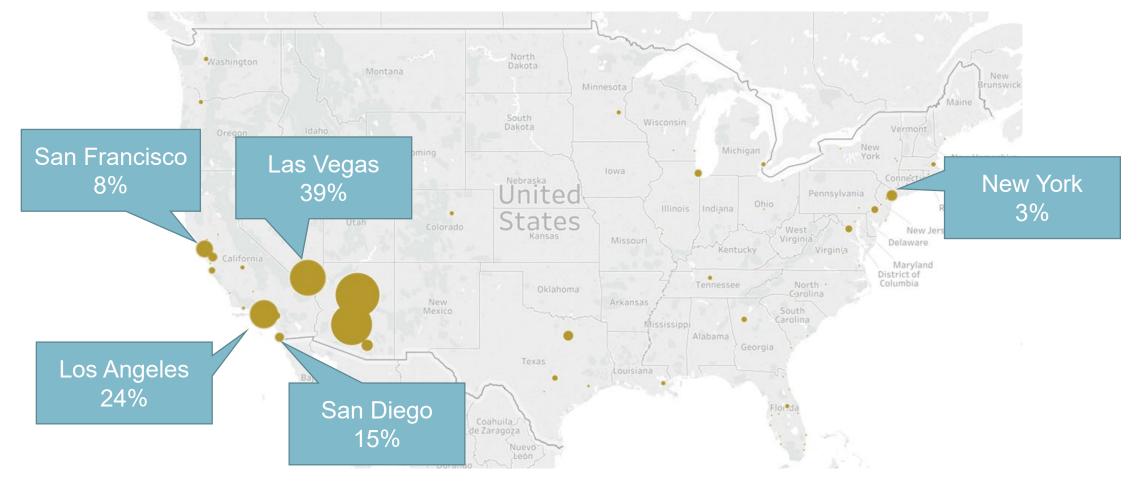
North Central

- Northern
- Phoenix & Central
- Tucson & Southern
- West Coast



Source: VisaVue Travel, 2018

# Other Destinations Visited



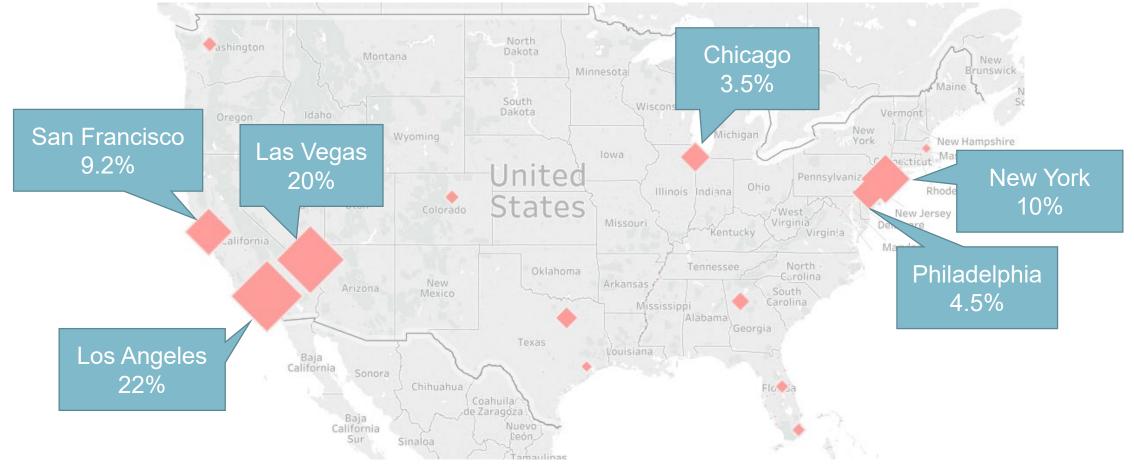
Source: Survey of International Air Travelers, NTTO

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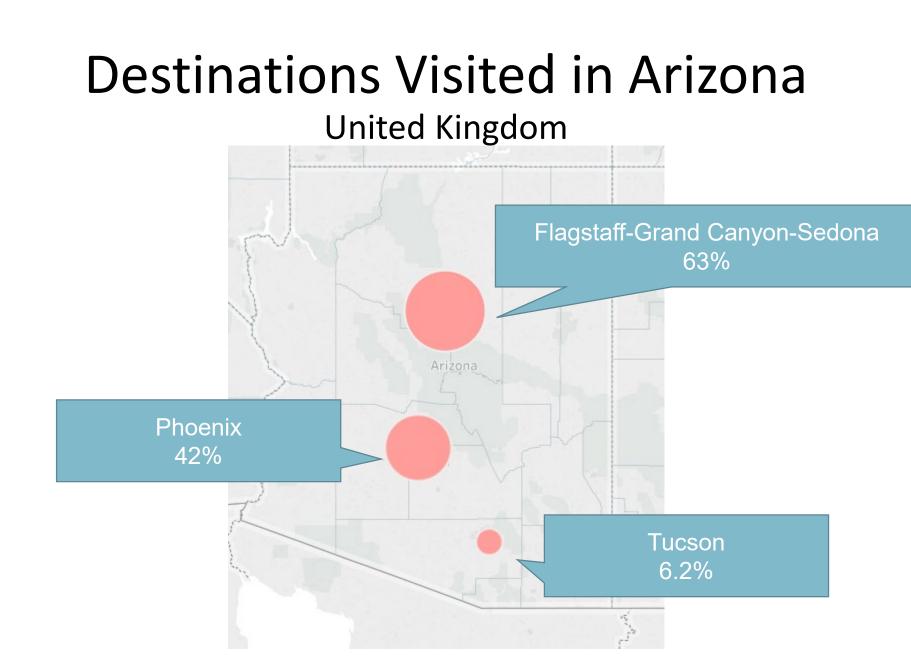
#### Port of Entry United Kingdom



Source: Survey of International Air Travelers, NTTO

\*23% reported "Other" airport, which may include PHX





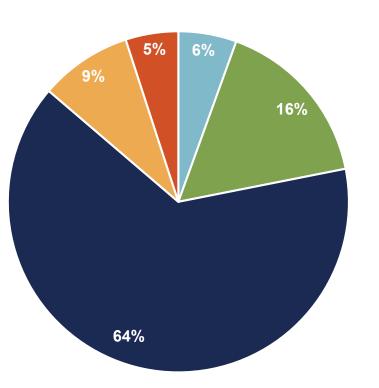
Source: Survey of International Air Travelers, NTTO

\*Passengers on the Phoenix to Frankfurt route are not included in this data.



### Where do visitors spend the most?

UNITED KINGDOM



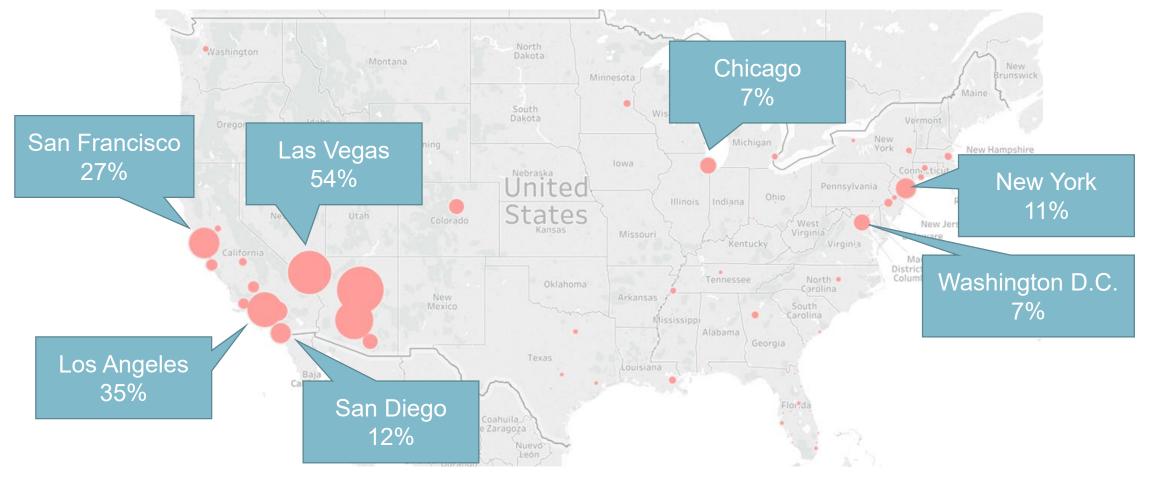
#### North Central

- Northern
- Phoenix & Central
- Tucson & Southern
- West Coast



Source: VisaVue Travel, 2018

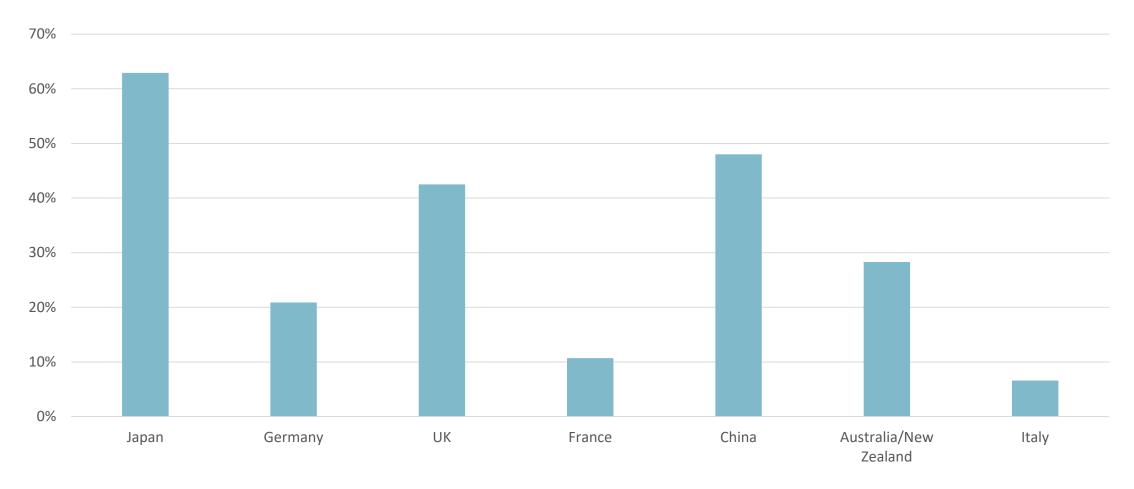
#### Other Destinations Visited United Kingdom



Source: Survey of International Air Travelers, NTTO



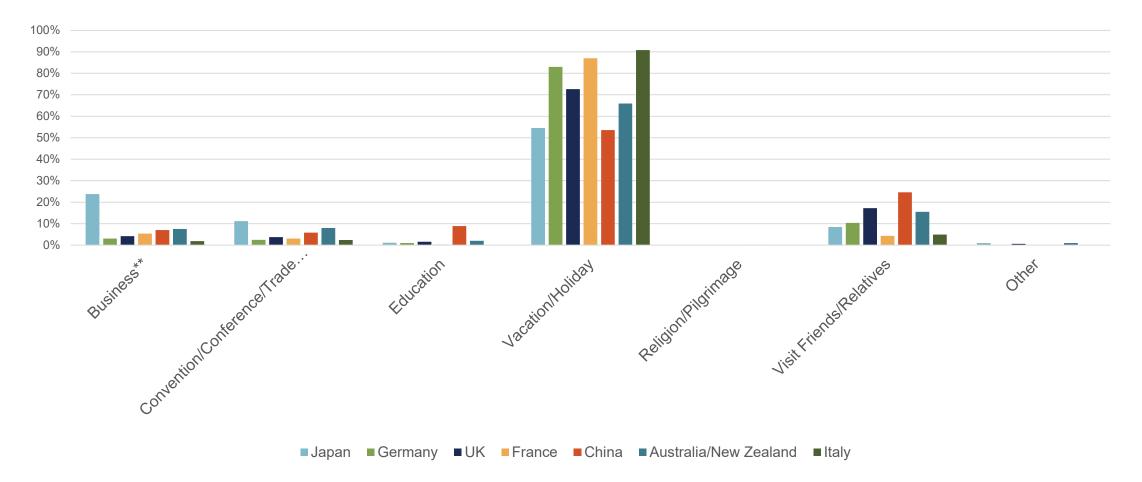
#### Arizona was the Main Destination



Source: Survey of International Air Travelers, NTTO



#### Main Purpose of Trip



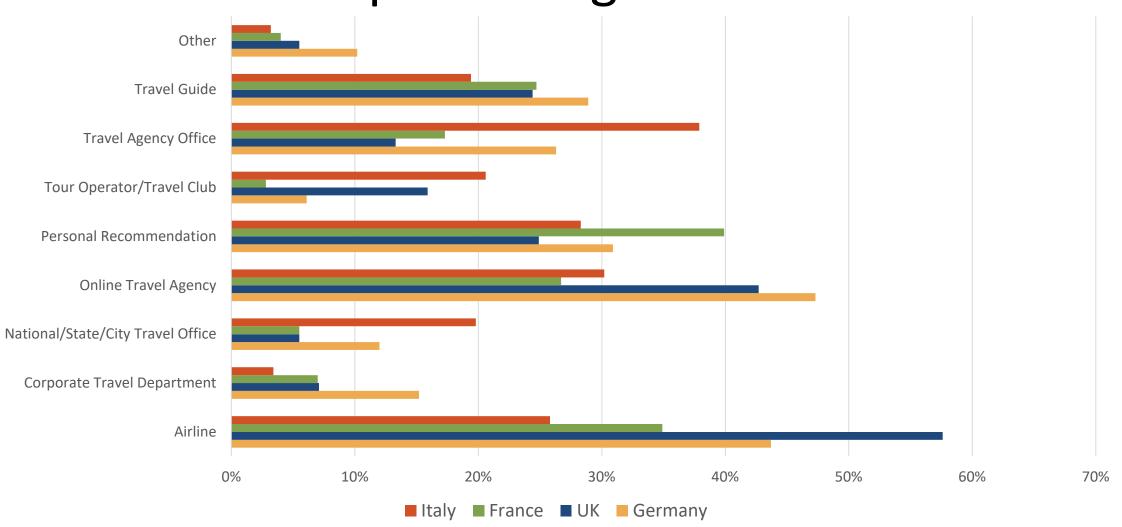


Source: Survey of International Air Travelers, NTTO

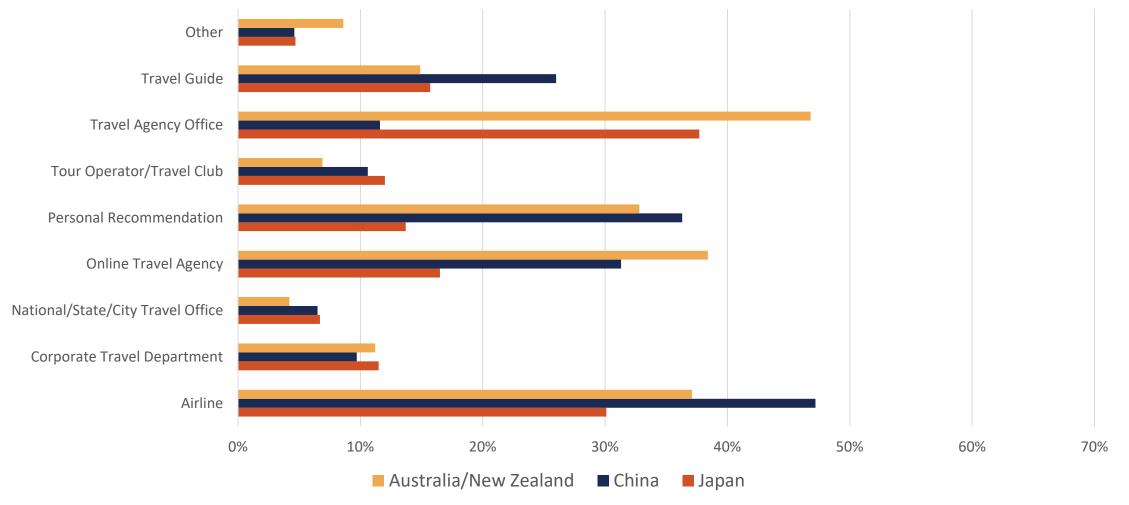
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#### **Trip Planning Sources**



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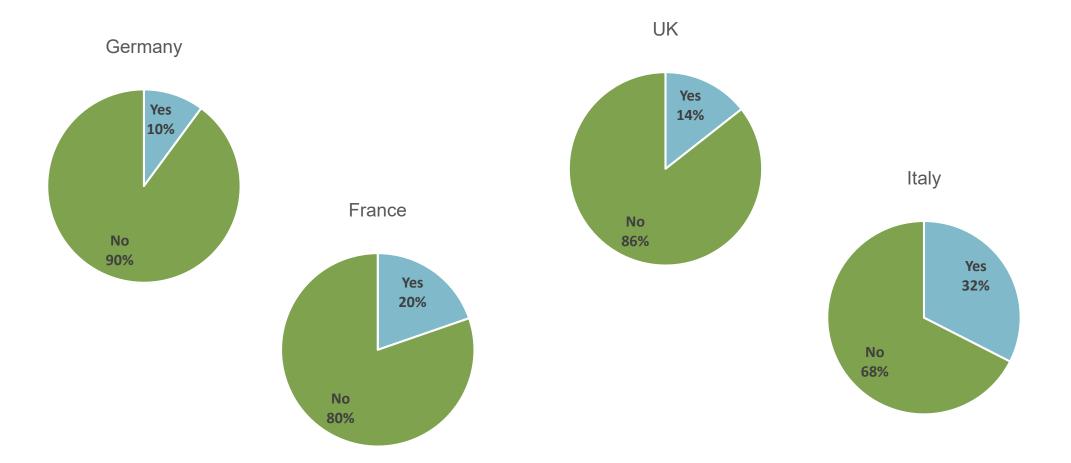


Source: Survey of International Air Travelers, NTTO

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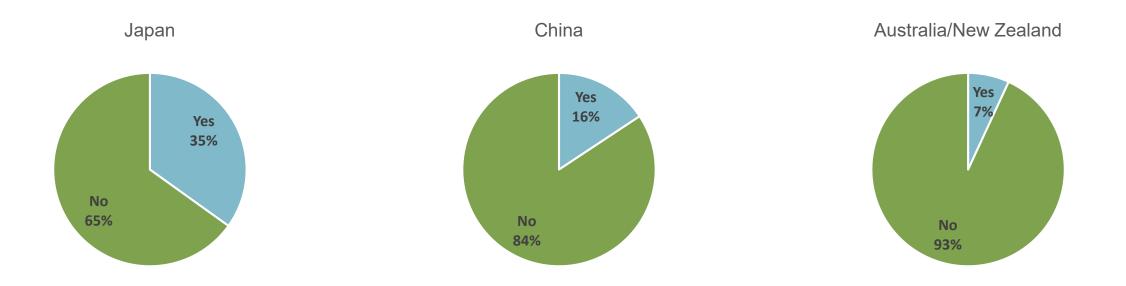
## Is this trip part of a prepaid tour package?





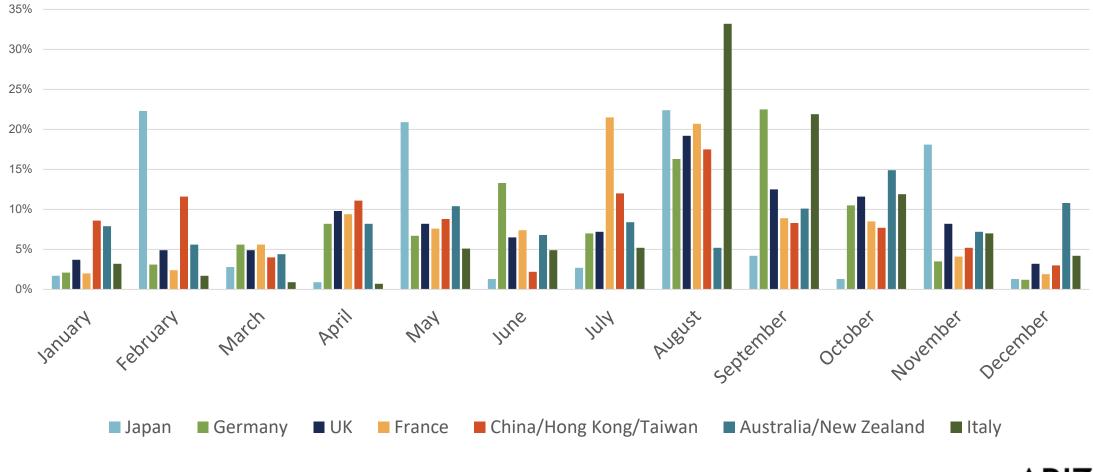


## Is this trip part of a prepaid tour package?





Source: Survey of International Air Travelers, NTTO

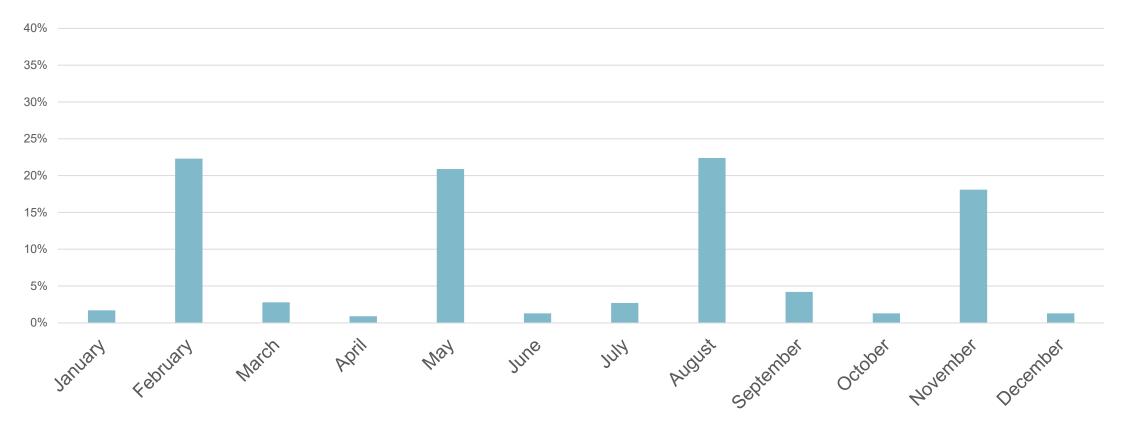


Source: Survey of International Air Travelers, NTTO

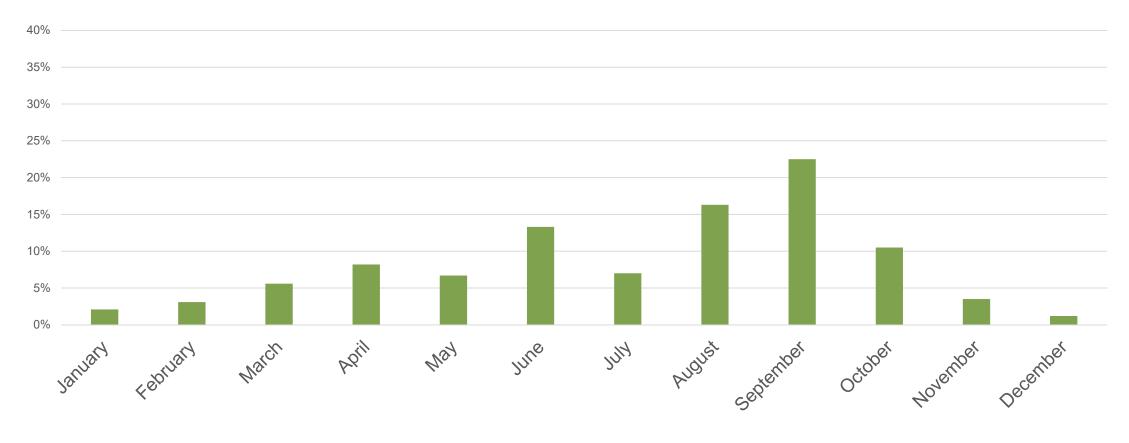


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### Month of Return Flight

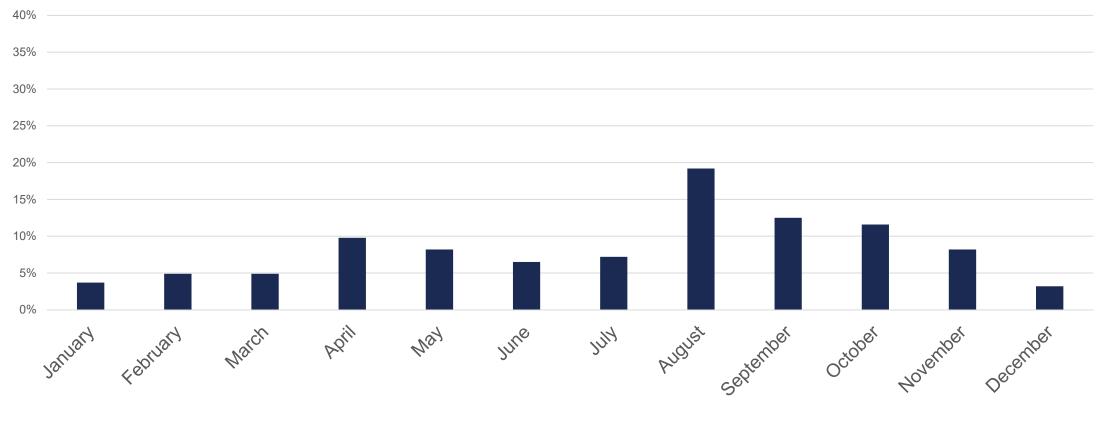




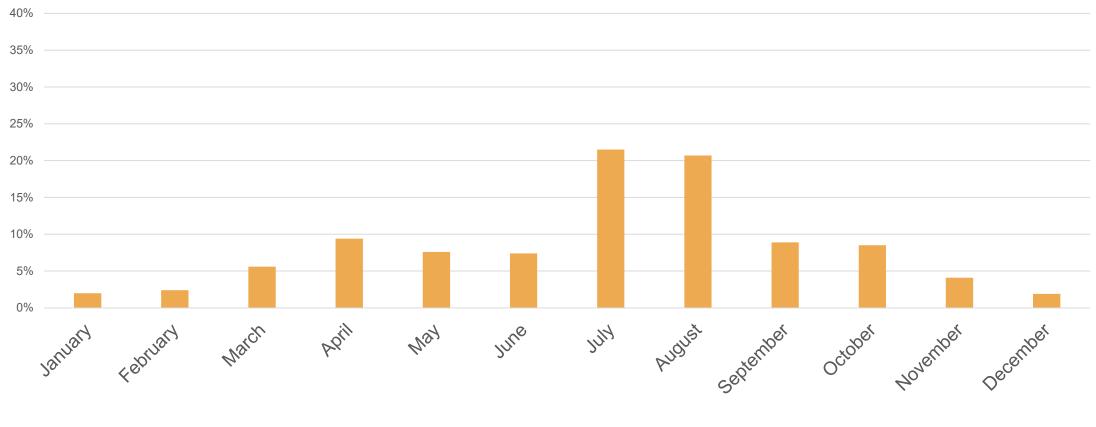


Germany



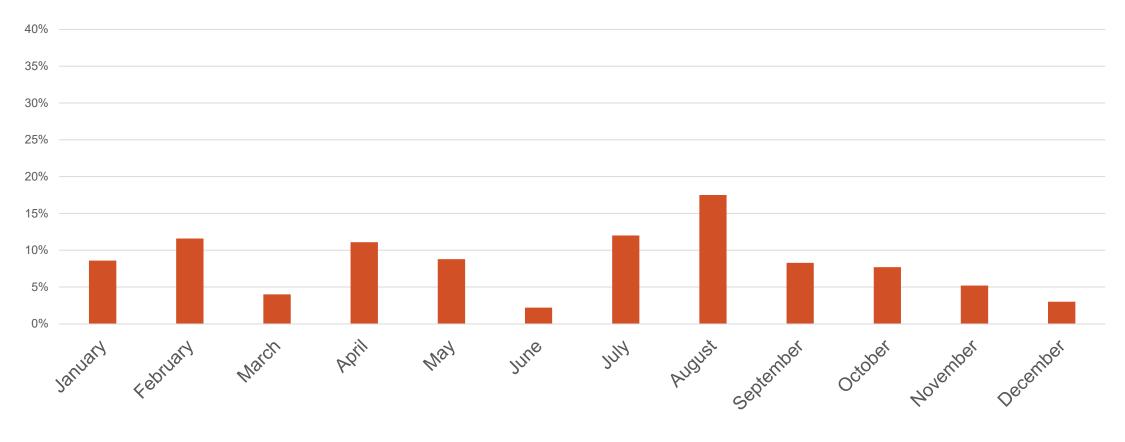






France

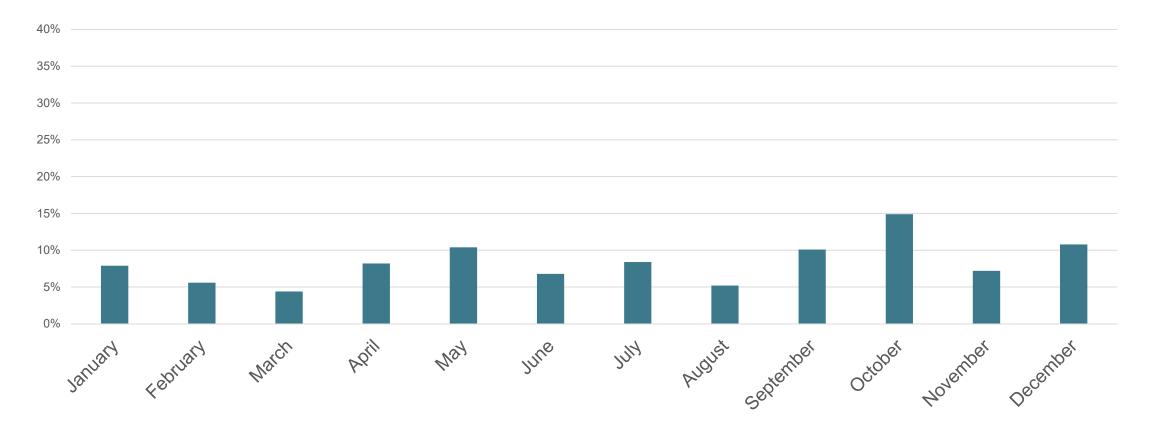




China/Hong Kong/Taiwan



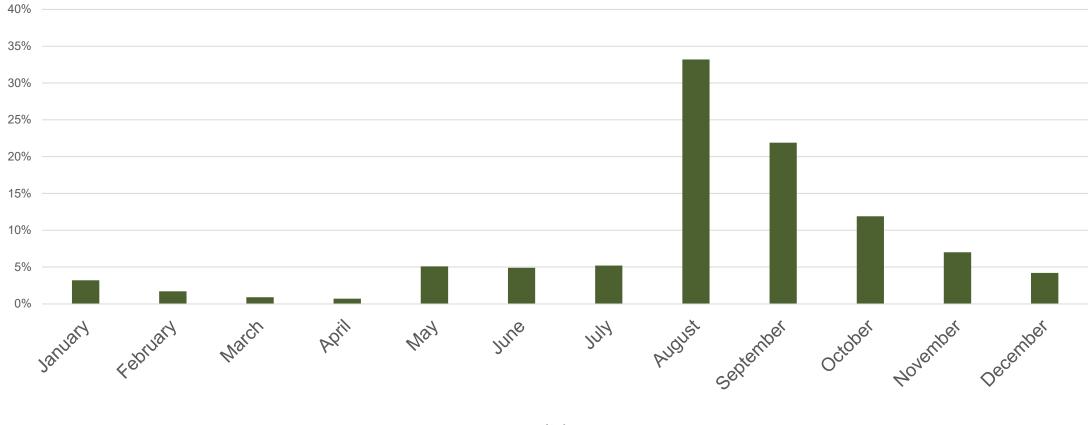
Source: Survey of International Air Travelers, NTTO



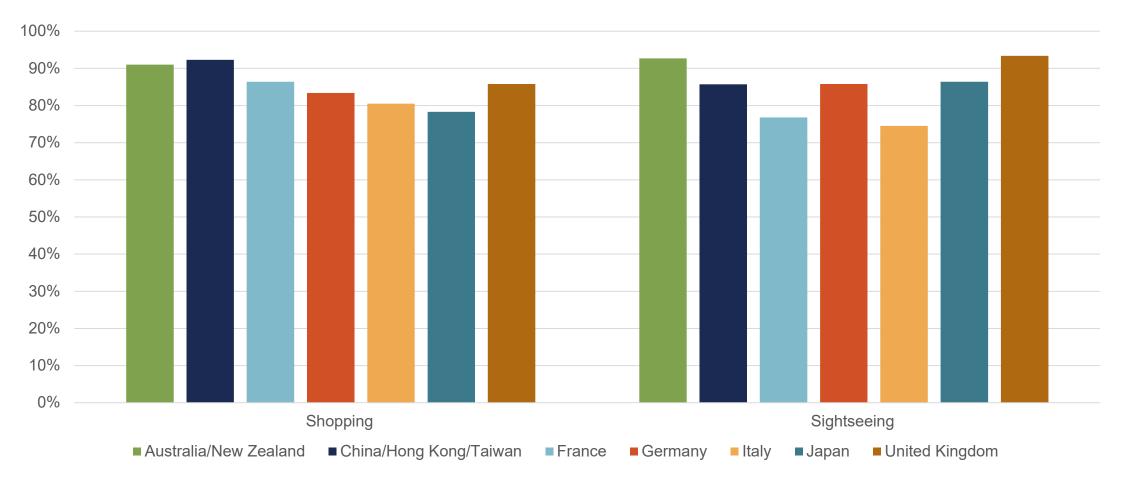
Australia/New Zealand



Source: Survey of International Air Travelers, NTTO

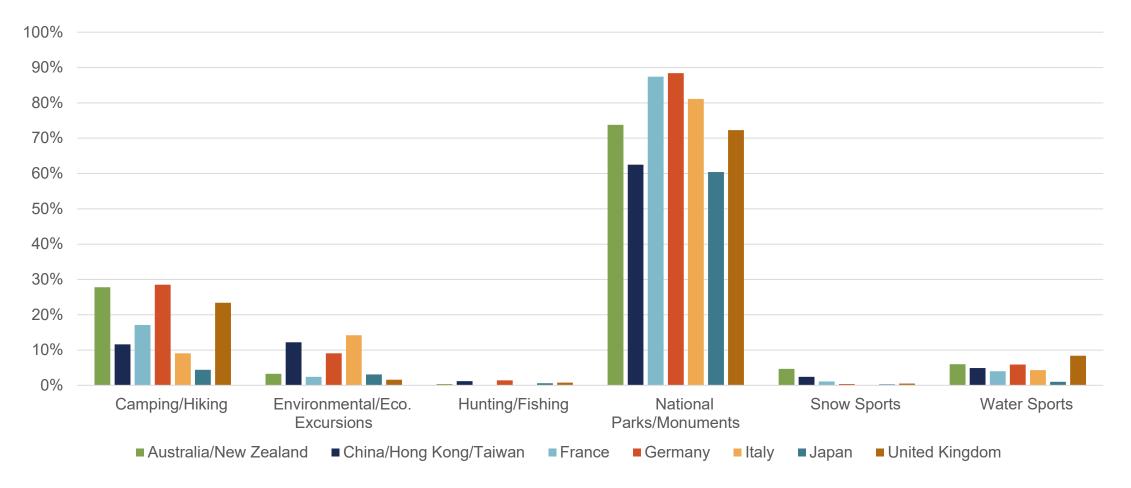




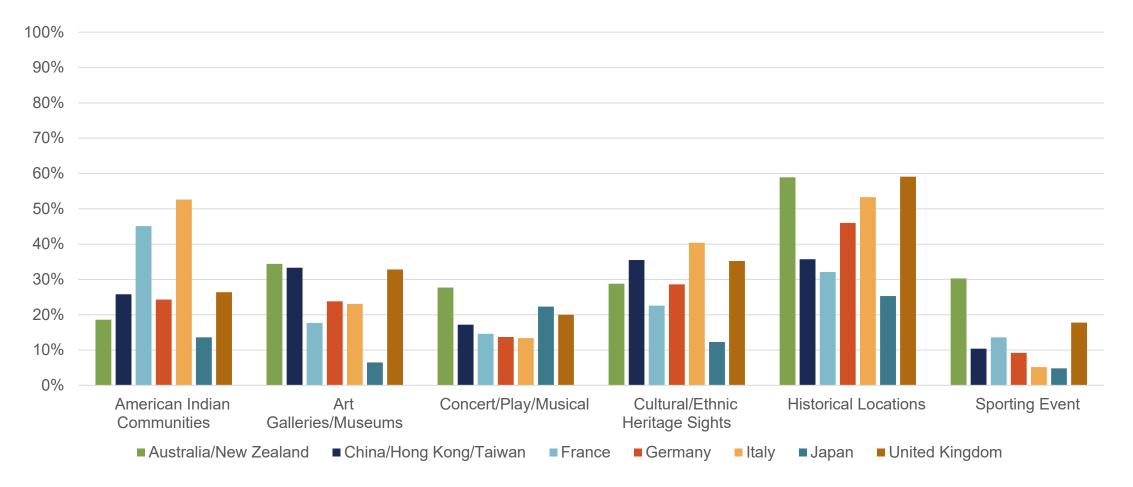


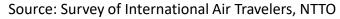
Source: Survey of International Air Travelers, NTTO



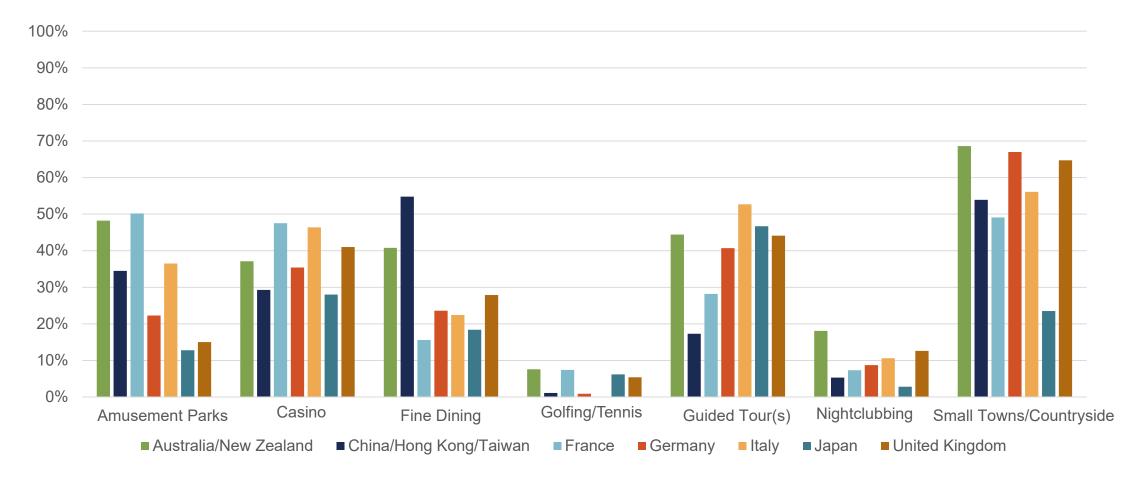


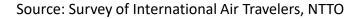














# Demographics

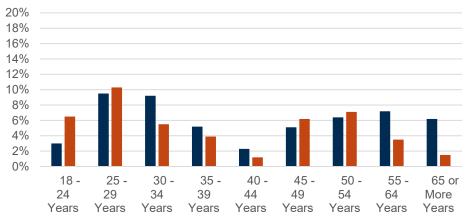


#### Age Distribution

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

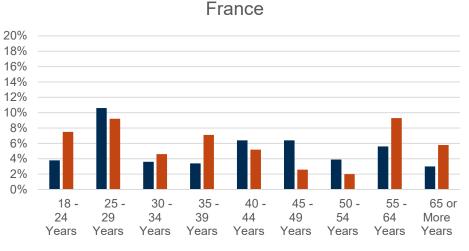
Male Adults Female Adults





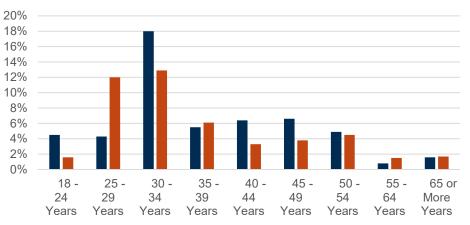
Source: Survey of International Air Travelers, NTFTO Female Adults

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Male Adults Female Adults

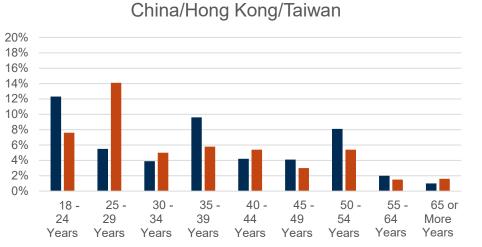




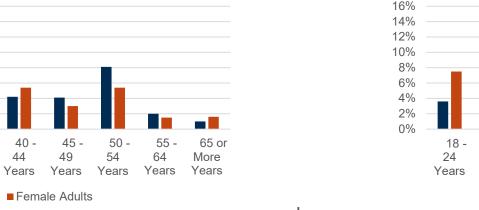
Male Adults
Female Adults



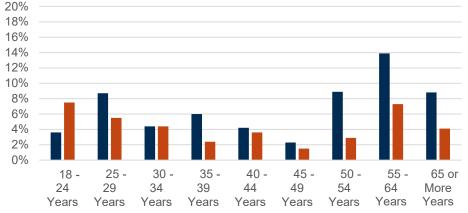
#### Age Distribution



Male Adults

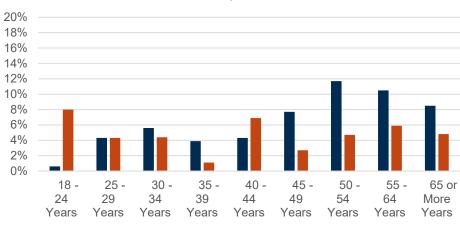


#### Australia/New Zealand



Male Adults Female Adults

Japan



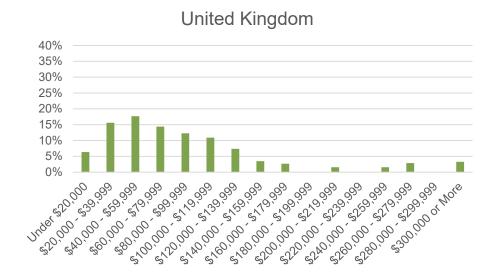


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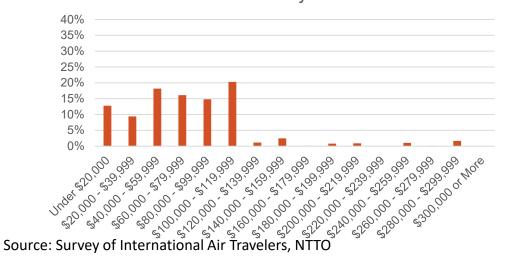
Male Adults
Female Adults

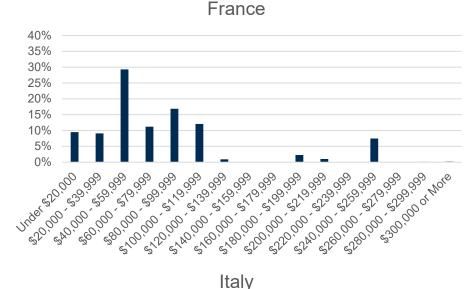


#### **Income Distribution**



Germany

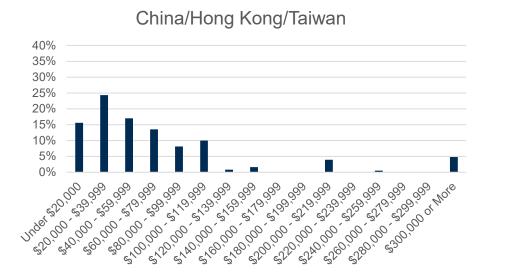




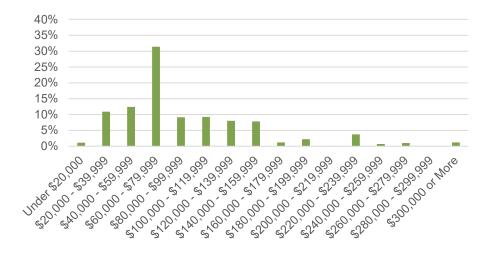
40% 35% 30% 25% 20% 15% 10% 5% 0% 5120.00 51.39 00<sup>99</sup> 5140,00 5139,00° 5160,00 5170,999 520,00 52<sup>39,999</sup> 5240,00 5259,999 5260,00 5279,999 \*180,00 \*189,999 560,00 518,00° 580,00 599,00 5100.00 5110.00<sup>99</sup> 5180,00 5109,00° 500,00 51,9,999 Under 520,00 420.00 439.0<sup>9</sup> 540,00, 549,00° 5300.00 0T. NOIE



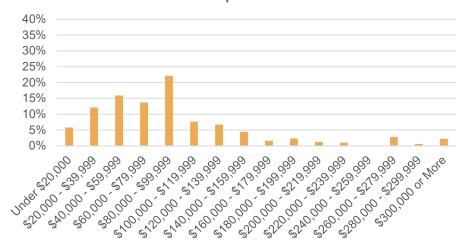
#### **Income Distribution**



Australia/New Zealand



Japan



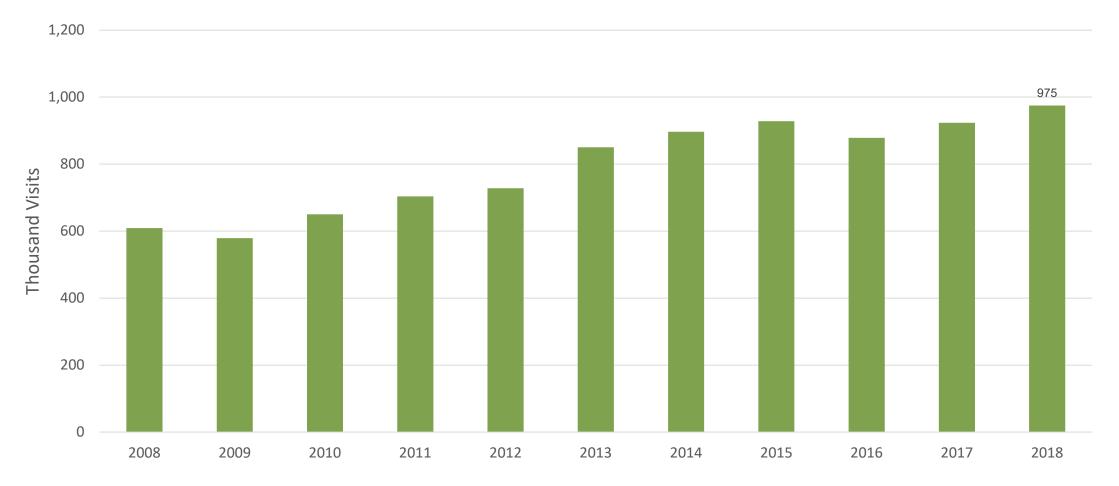


Source: Survey of International Air Travelers, NTTO

# **Canadian Visitation**



#### **Canadian Visitation to Arizona**

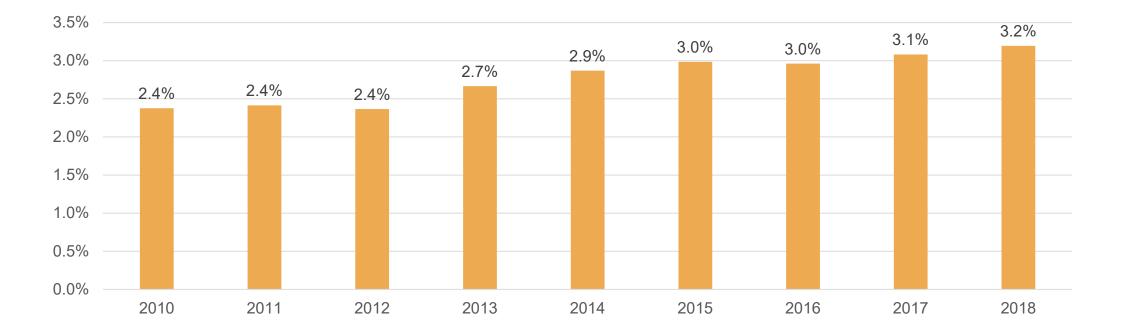


Source: Tourism Economics



#### AZ Share of Canadian Visitation

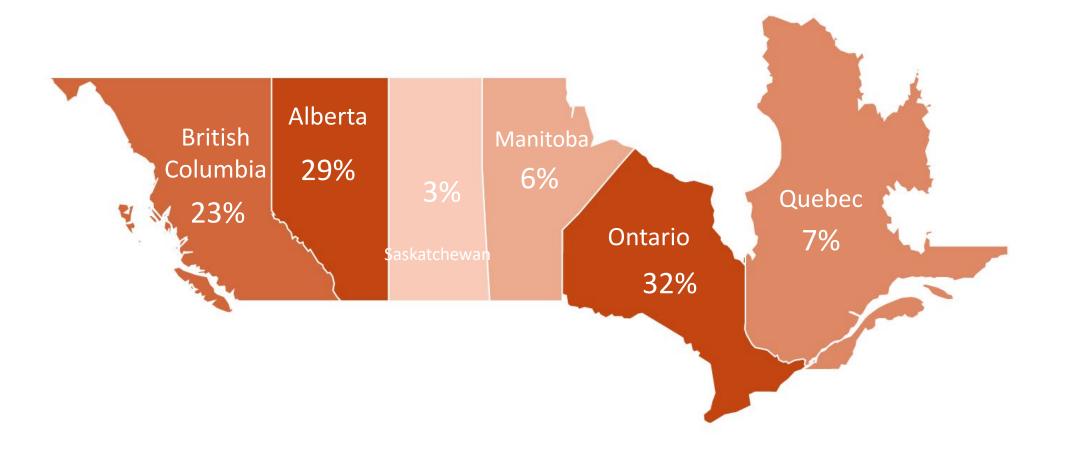
**Overnight Share** 



Source: Xborder Canada, 2018

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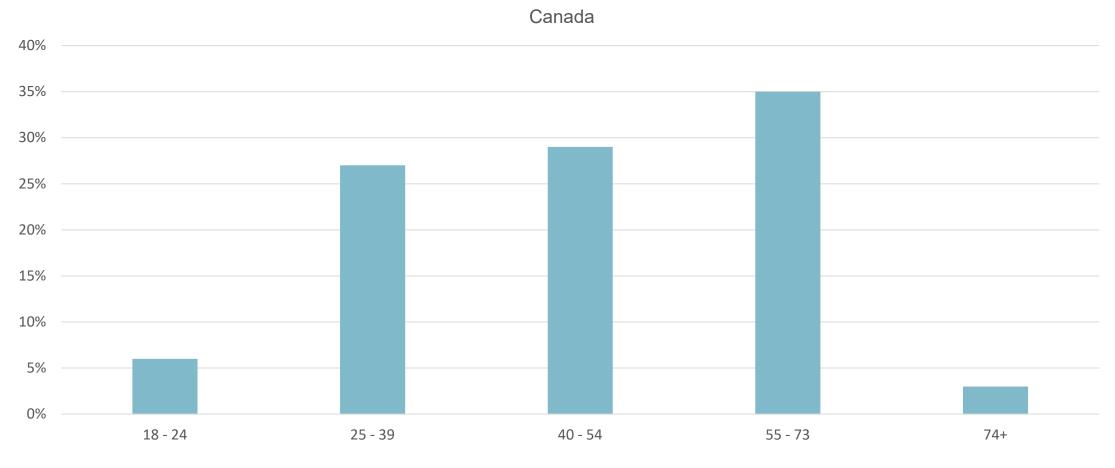
#### **Canadian Visitation**





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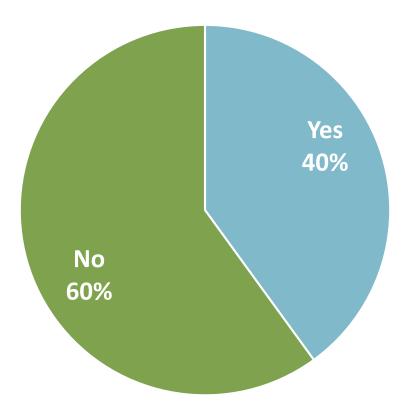
### Age Distribution



Source: Xborder Canada, 2018

ARIZONA OFFICE OF TOURISM

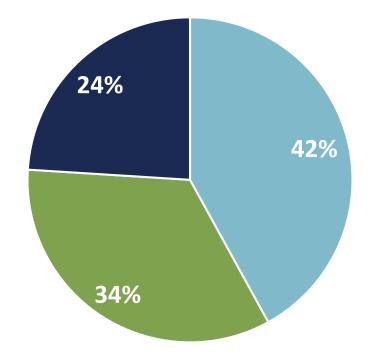
#### Children Under 18 at Home







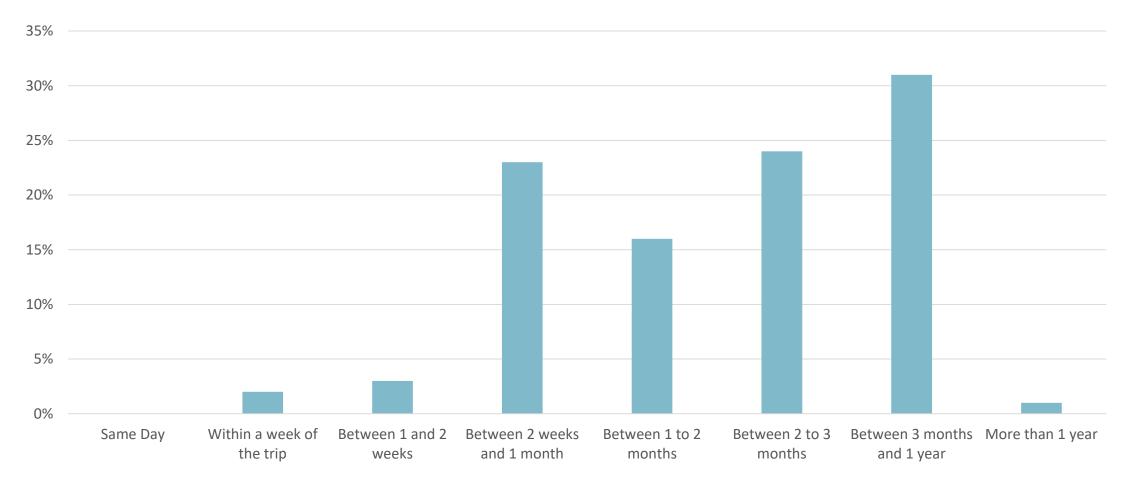
### Employment



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

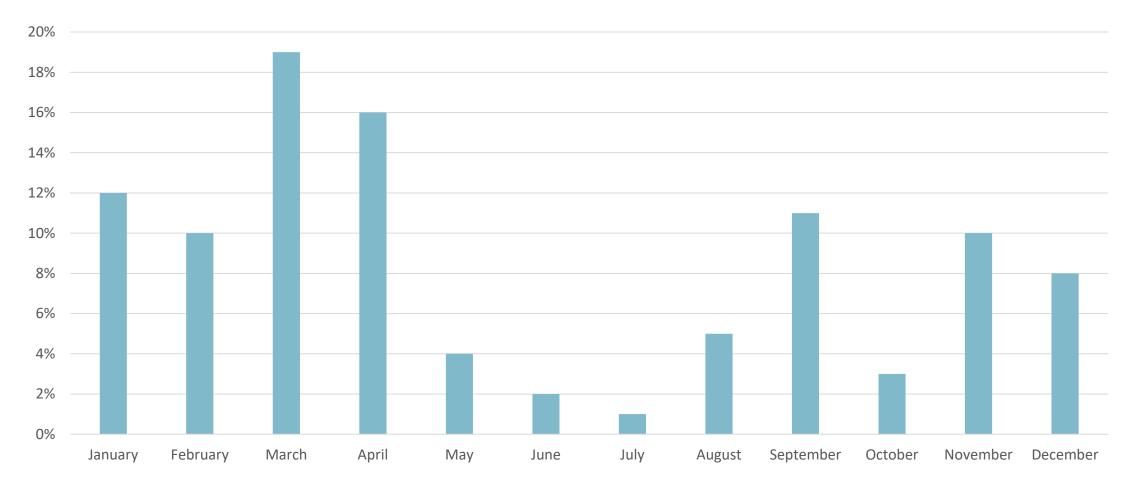


#### Time from Decision to Departure





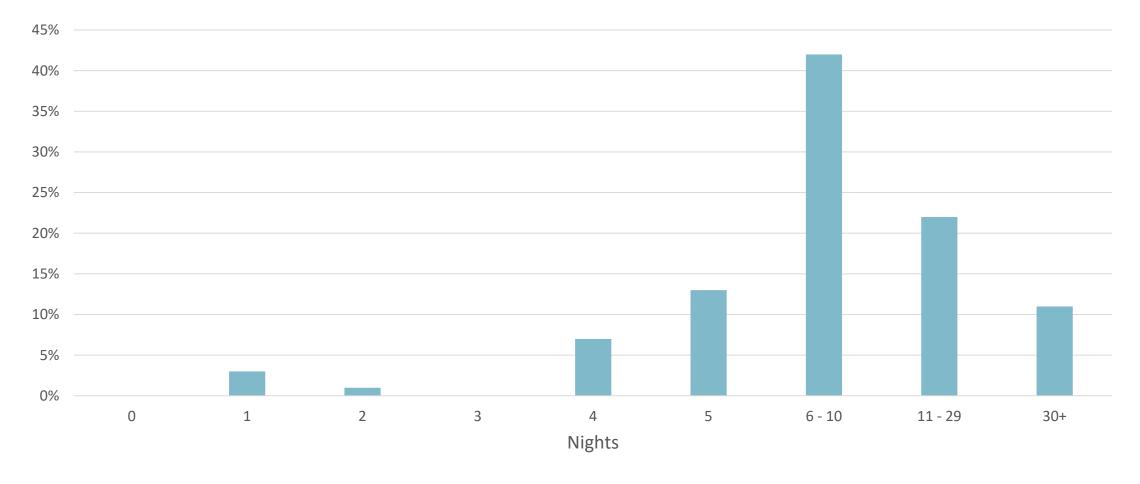
## Month Trip Began





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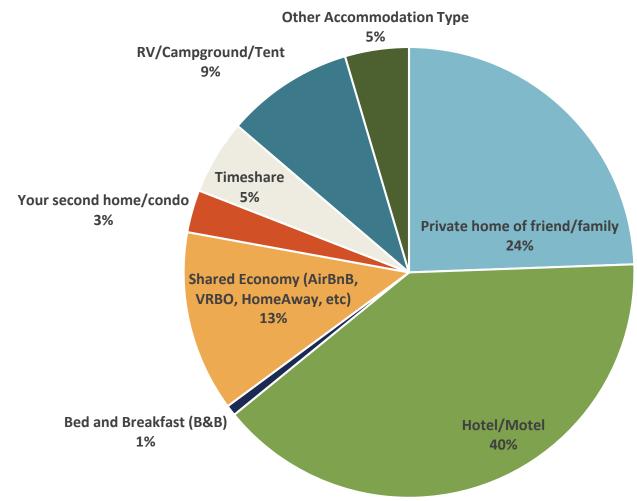
## Nights on Trip







#### Accommodations



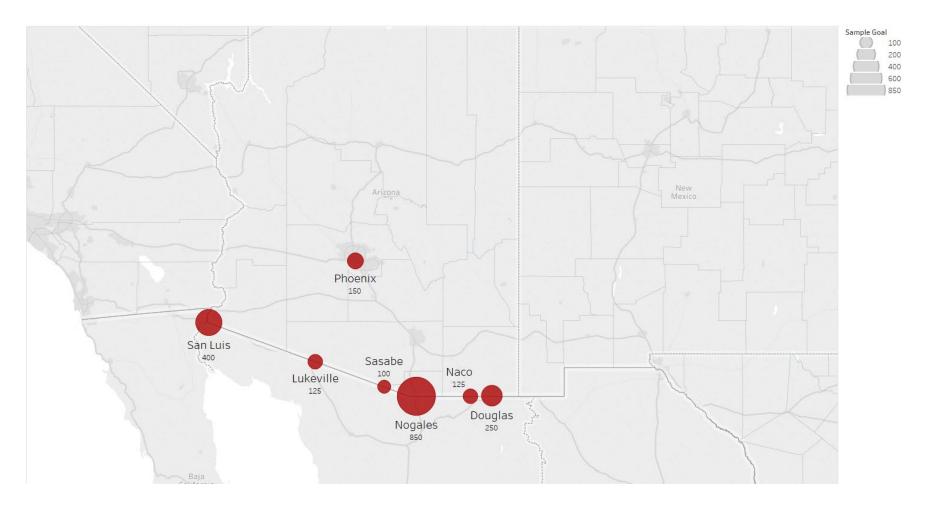


# Mexico Study Update



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### Sampling Plan







F



What was the **primary purpose** of this visit to

(Select ONE category, probe as necessary)

Professional Sports/Attend Game (Spring

Play Sports/Watch Kids Sports

(Club/Rec/School/Social)

Training/Cardinals/Suns/Dbacks/Coyotes/Golf Event,

Arizona?

O Visiting Friends/Family C Leisure/Personal/Social

Medical/Healthcare

O Shopping School

etc)

Other (Specify)

Business/Work/Professional

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R	Е	S	Ε	A	R	С	Η	•

Español
¿Cuál es su <b>principal propósito</b> para vistar Arizona?
(Nota: Seleccione UNA categoría y pruebe según sea necesario)
🔘 Visitando Amigos / Familia
Ocio / Personal / Social
🔘 Negocios / Trabajo / Profesional
O Medicina / Salud
⊖ Compras
C Escuela

- O Deportes Profesíonales / Asístir juego (entrenamiento de primavera / Los D-Backs / Los Suns / Los Cardinals / Los Coyotes / evento de golf, etc.)
- O Deportes / Ver Deportes Infantiles (Club / Grabar / Escolar / Social)
- Otro (Especifica)



 $\leftarrow \rightarrow$ 

### **Project Timeline**

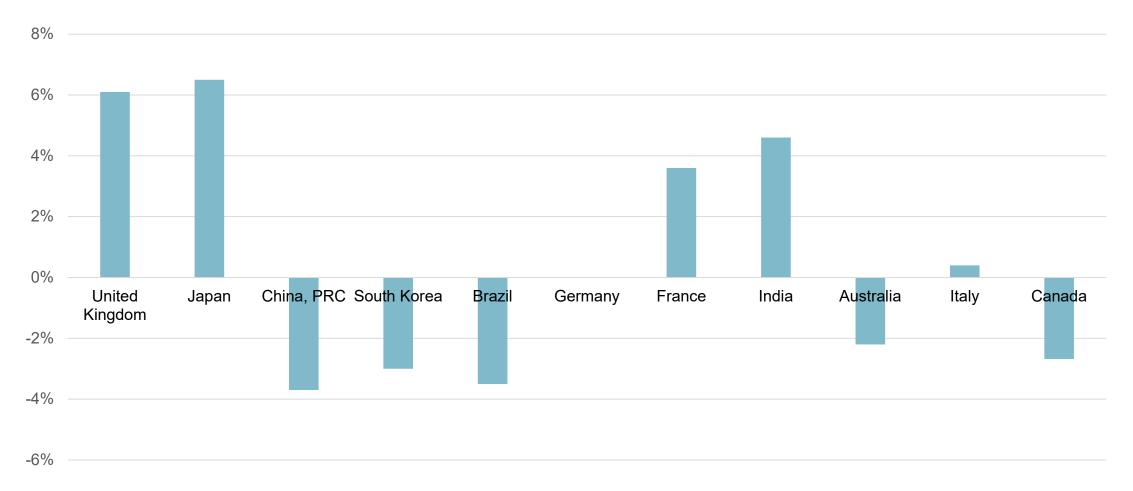




# 2019 Year-to-Date



#### Arrivals to U.S. % Change YTD July 2019\*





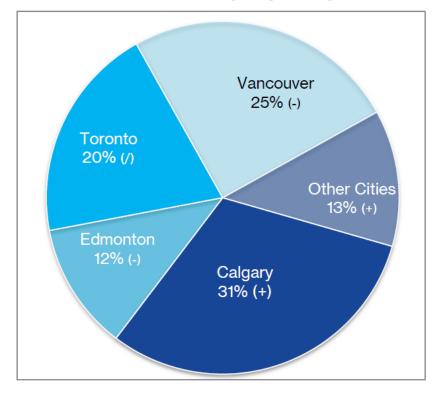


#### Canadian Deplanements YTD August 2019

#### **Direct Passenger Arrivals by City of Departure**

Jan-Aug	2018	2019	% Change
Calgary	89, <mark>1</mark> 36	<mark>93,753</mark>	5.2%
Edmonton	<mark>43,665</mark>	35,449	-18.8%
Kelowna	<mark>3,823</mark>	3,585	-6.2%
Montreal	5,241	10,115	93.0%
Regina	<mark>6,925</mark>	7,029	1.5%
Saskatoon	<mark>6,997</mark>	7,357	5.1%
Toronto	60,781	60,211	-0.9%
Vancouver	95,268	76,098	-20.1%
Winnipeg	10,144	<mark>9,888</mark>	-2.5%
Subtotal PHX	321,980	303,486	-5.7%
Subtotal AZA	6,379	10,888	<b>70.7</b> %
TOTAL	328,359	314,373	-4.3%

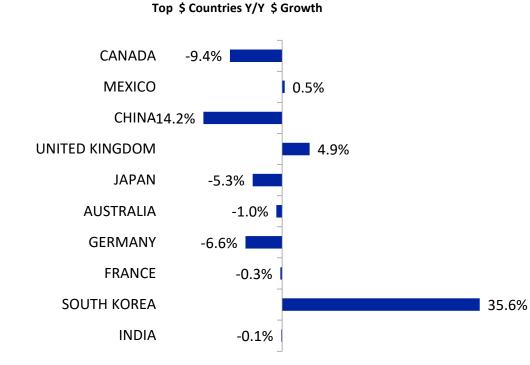
#### Share of Arrivals at PHX by City of Departure



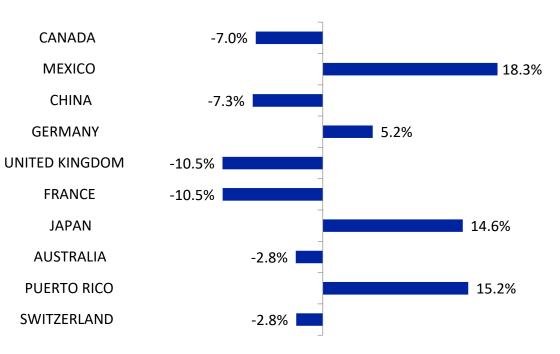


#### Visa Spending Q1 and Q2, 2019

#### **January-March**



#### **April-June**



Top \$ Countries Y/Y \$ Growth

Source: VisaVue Travel

## Thank You!

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www.tourism.az.gov

