

GLOBAL
REACH
LOCAL
IMPACT

ARIZONA

OFFICE OF TOURISM

COUNTRY PROFILE (2019)



French President since May 2017: **Emmanuel Macron**
“La République En Marche” – Centrist and social-liberal political party



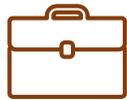
France is the 6th largest economy in the world (source Espace Manager)



GDP: **\$2.85 trillion** - GDP Growth: **2.3% in 2019** vs. +2,3% in 2018 (Arizona Office of Tourism Research Division)

GDP per capita: **\$43,317** in 2019 (source: IMF)

Gross Disposable Income: **+1.5%** in 2019 (source: INSEE)



Unemployment rate: **9.4% in 2019** vs. 9.4% in 2018 (Arizona Office of Tourism Research Division)

Since 2008, the unemployment rate consistently decreased, down to 7.8% by end of 2020 Q1



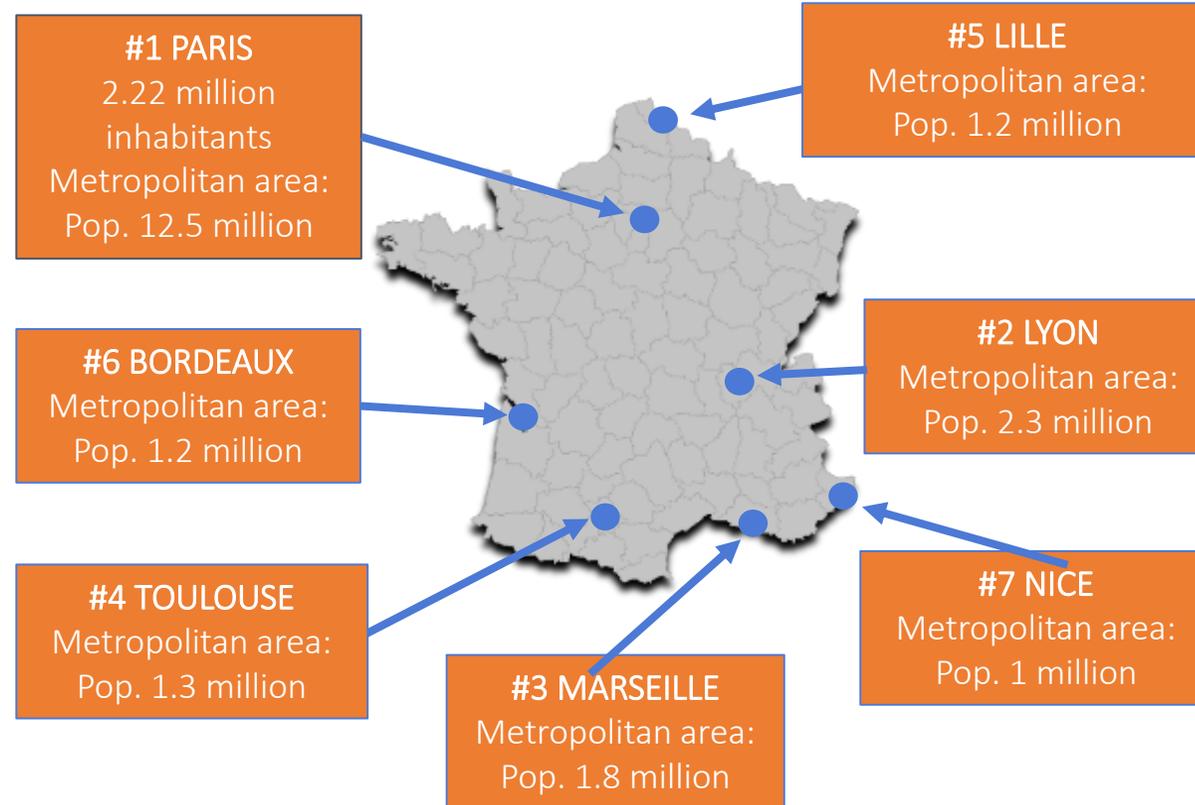
Favorable business climate since 2010

Average annual inflation rate: **1.2%** (will be impacted by the COVID)

FRANCE DEMOGRAPHICS



Population: 67,8 million - 2nd most populated country in the European Union



Source: INSEE

FRENCH TRAVELERS TRENDS



Traveling habits (2019)



6-10 weeks paid vacation
and 11 public bank
holidays per year

Departure rate in 2019:
68% among which 49%
abroad

Average budget \$2,600
*(35% accommodation., 25%
transport, 13% food, 10%
shopping, 9% ground
transportation, 8% activities)*



Top 3 long-haul
destinations:

- 1) USA
- 2) Dominican Rep.
- 3) Mauricius

French travel twice a
year (vs. once a year for
other UE countries)

Decision making criteria:

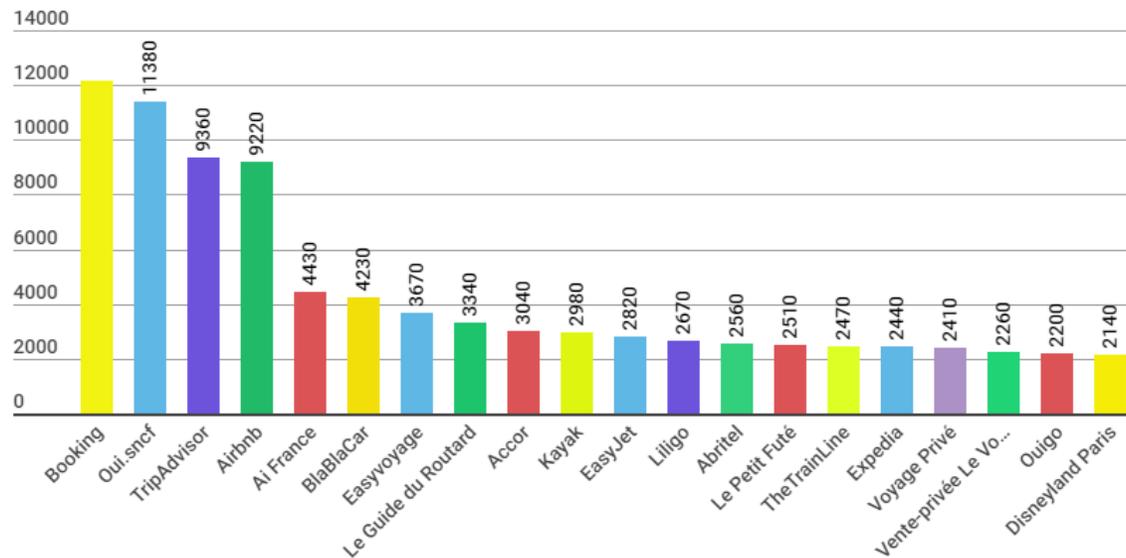
- Weather
- Security level
- Value for money



Booking habits

Top 20 websites for travel bookings in 2019

Million unique visitors per month



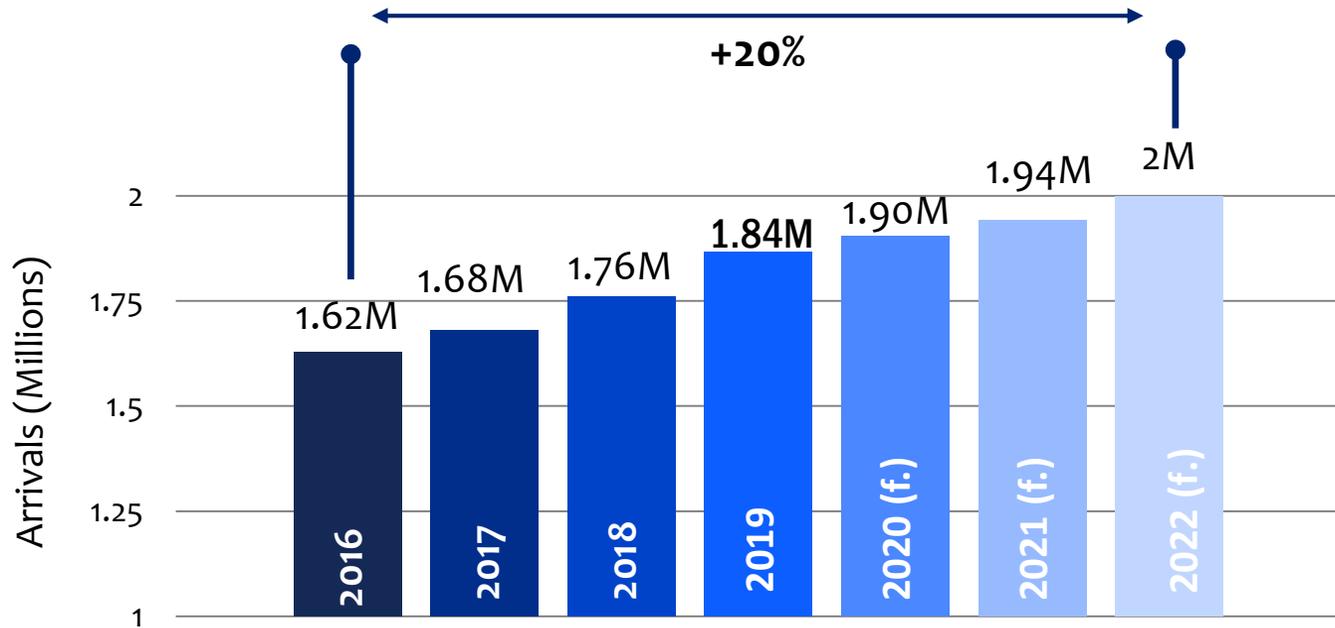
Tourism is the **3rd largest market share** of e-commerce in France (40%)

- **84%** of French travelers in 2019 were “E-tourists” and prepared their trips online
- **60%** of French travelers **booked their trips online**

Source: L'Echo Touristique

FRENCH TRAVELERS TO THE U.S.

Number of visitors and forecast



2018 – France is ranked **third** among European countries in terms of visitors behind UK and Germany

2019 – **4,3% increase**, putting France in the Top 10 of the emitting countries

2020/2022 Forecast – Estimations done before the pandemic, up to date forecast N/A

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office



FRENCH TRAVELERS TO THE U.S.

2019 Visitors' Profile



1.84 million French travelers to the U.S. in 2019 (+4,3%), **66%** of them are **repeaters**



Average Nights per Destination: **3.1**



Average length of trip: **19.6 nights**



Average age: **43 years old**



Average Household Income: **\$76,982**

Top travel motivators

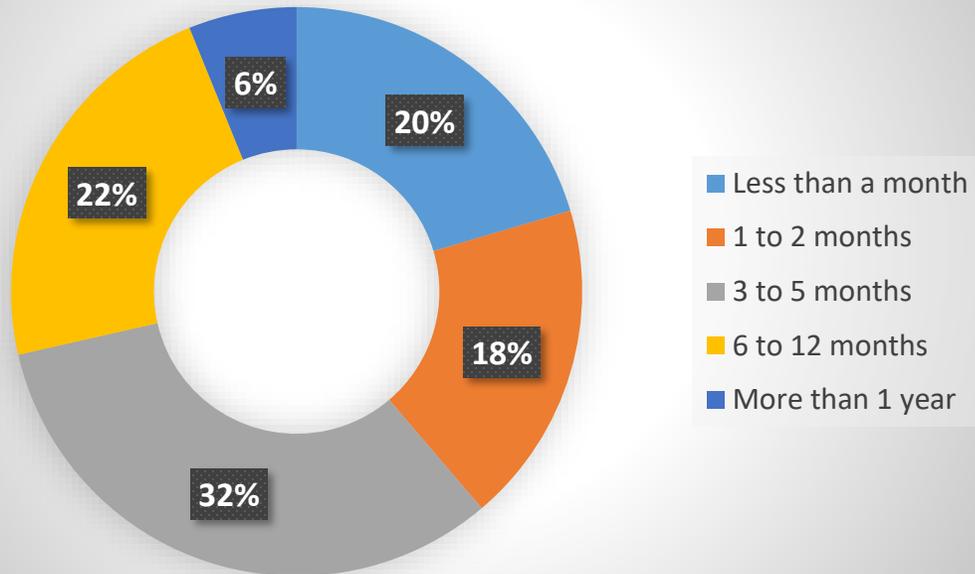
- 55% Local lifestyle
- 51% Cultural/Historical Attractions
- 41% Urban attractions
- 40% Dining/Gastronomy

FRENCH TRAVELERS TO THE U.S.

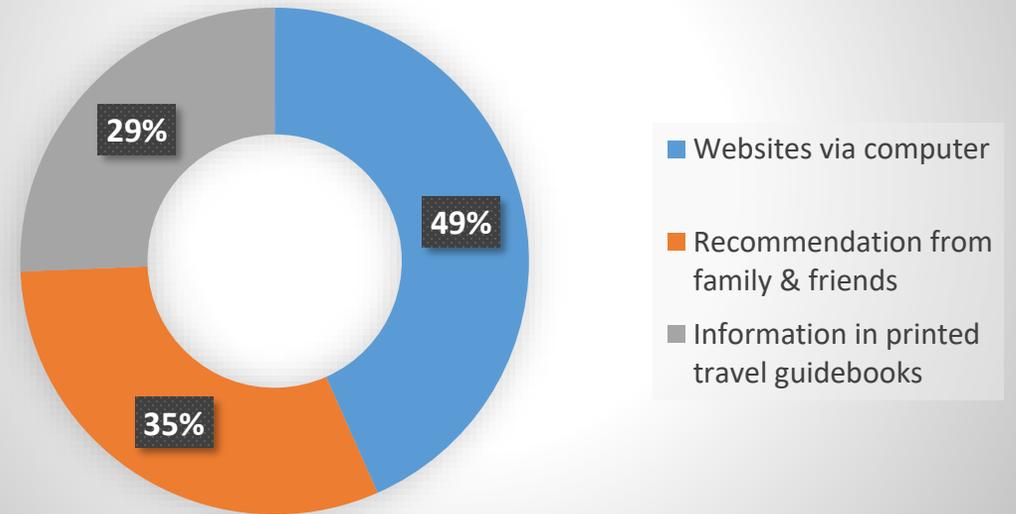


2019 Visitors' Profile

Advance Decision Time



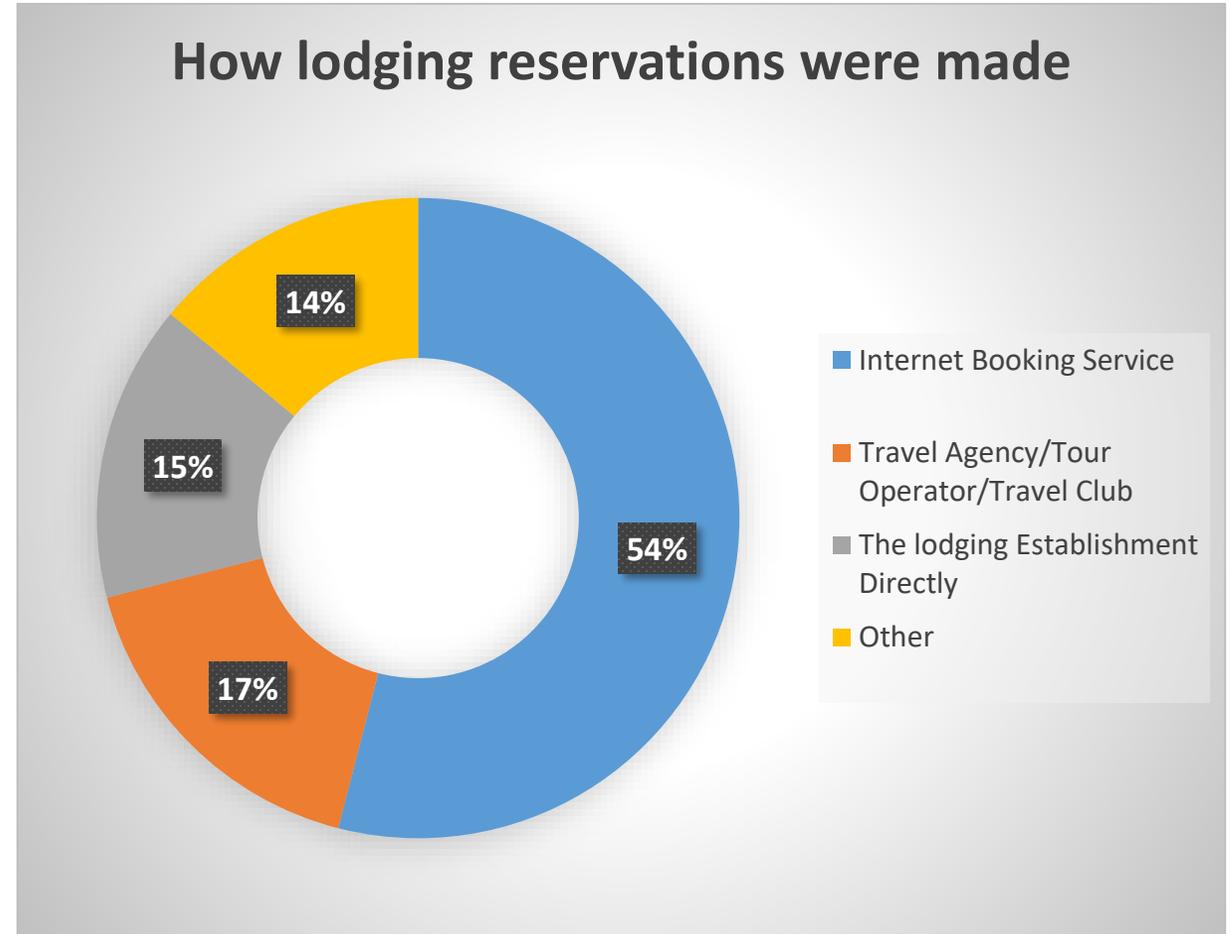
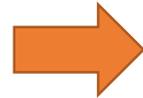
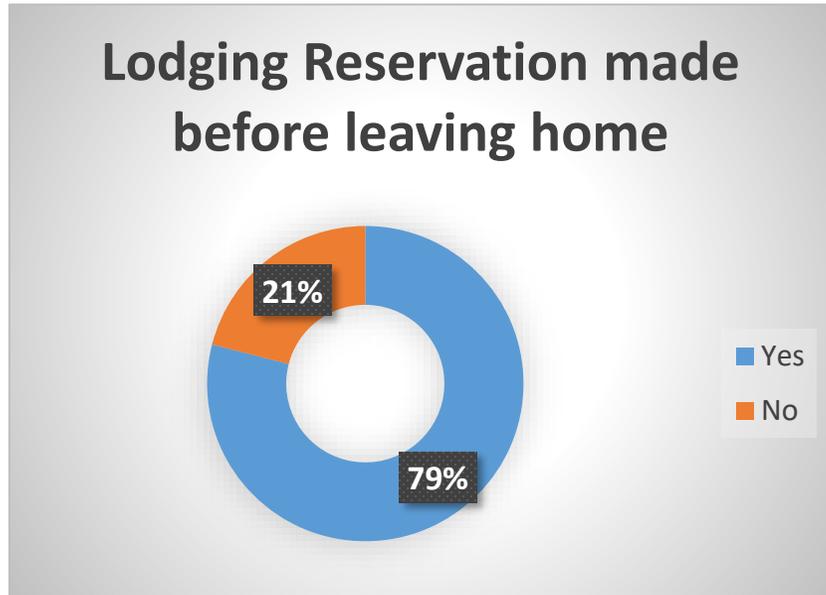
Source used in Destination selection for last international trip



Source: Brand USA, reporting 2019 intercontinental traveler data U.S. Dept. of Commerce

FRENCH TRAVELERS TO THE U.S.

2019 Visitors' Profile



Source: Brand USA, reporting 2019 intercontinental traveler data U.S. Dept. of Commerce

FRENCH TRAVELERS TO ARIZONA



Arizona welcomed **115,900 French visitors** in **2019** (+6,6% vs 2018), who spent **\$150 million in total**



Length of stay
19.6 nights



Hotels/motels
78%



Purpose of trip
92% leisure



Average age
43 years old



Transportation
74% rented car

Source: France Market Profile /AOT



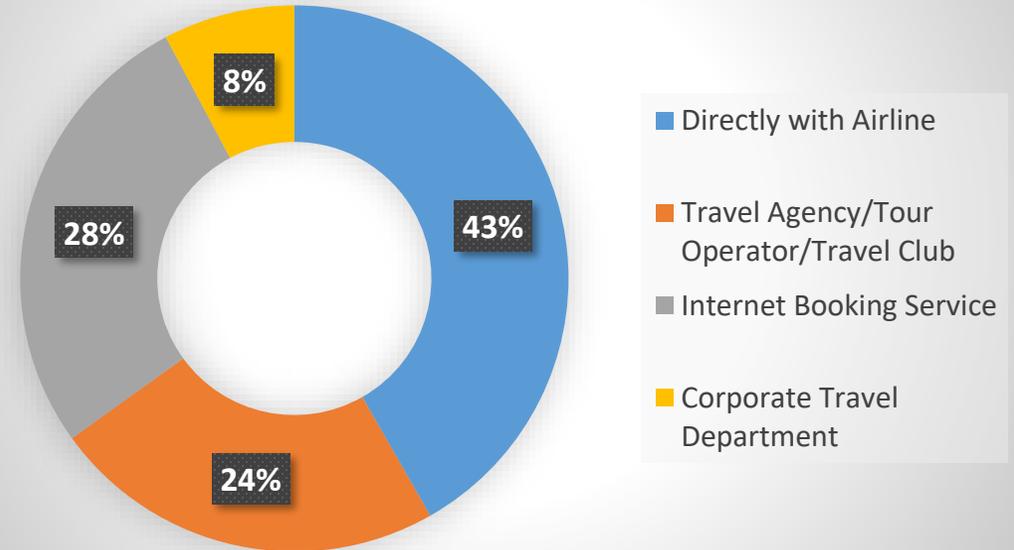
FRENCH TRAVELERS TO ARIZONA

Flights from Paris (before the pandemic)

- Aer Lingus: Los Angeles, San Francisco
- Air France-KLM: Dallas, Los Angeles, San Francisco
- Air Tahiti Nui: Los Angeles
- Air Canada: Montreal, Toronto
- American Airlines: Charlotte, Chicago, Dallas, Philadelphia
- British Airways: Phoenix (via London)
- Condor: Phoenix (via Frankfurt)
- Delta Air Lines: Atlanta, Salt Lake City
- Icelandair: Los Angeles, San Francisco
- United: Chicago, Washington
- Norwegian: Denver, Los Angeles, San Francisco

Main port of entry: Los Angeles (61%)

How Air Reservation were Booked

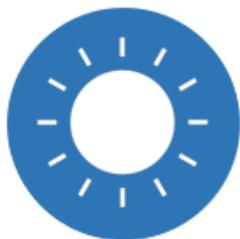


Source: Brand USA, reporting 2019 intercontinental traveler data U.S. Dept. of Commerce

FRENCH TRAVELERS TO ARIZONA



What French people like most in Arizona



Nature, Parks
and
Monuments



Spa & well-
being



Western-style
cowboy way of
life



American Indian
heritage and
culture



Golf &
outdoor
activities



Art and
architecture



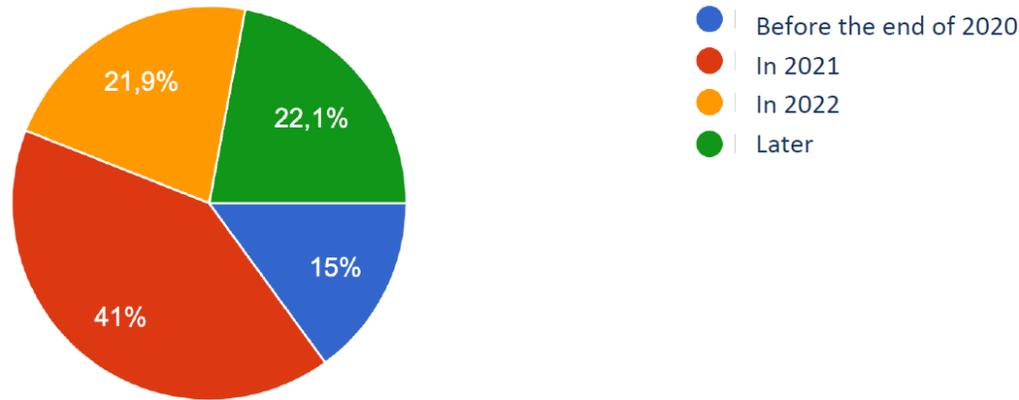
Southwestern
cuisine



Shopping



The French still have a strong desire to travel in the U.S: 90% of the respondents are willing to travel again to the USA once the pandemic crisis is over: 41% are aiming at a trip in 2021 and even 15% are willing to travel to the US before the end of 2020.



Travelers Look West

- It is mainly the **USA West** that is targeted by the respondents for their future trip (40,7%), followed by the East (29,1%) and then, the South of the USA (17,8%).

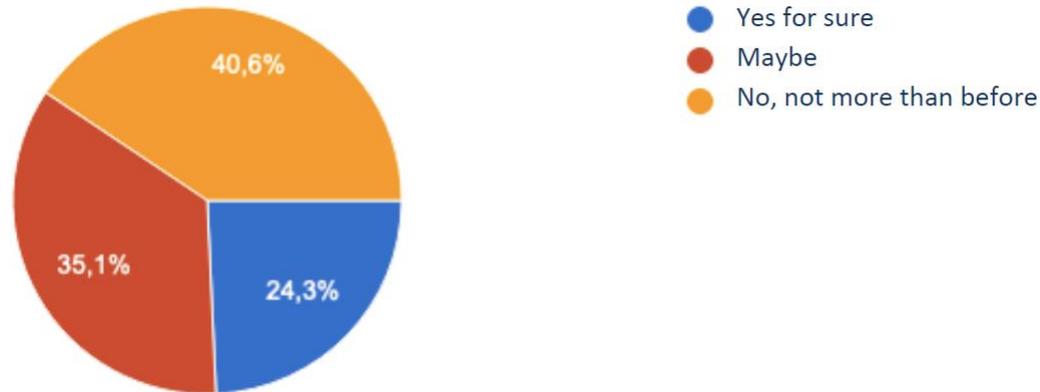
**Visit USA Committee France has conducted a survey among its B2C database to measure the impact of the pandemic on their desire to travel to the United States*



One of the consequences of the pandemic is that travelers seem ready to make greater use of the services of tourism professionals.

- To the query: «Do you think you will use the services of a tourism professional in the future, especially in view of the difficulties encountered in the context of the health crisis by individuals who have organized their stay themselves (cancellation, difficulty of repatriation...)», more than half are thinking of using it now.

It should be noted that 71% of the respondents who had travelled the US had organized their trip themselves.



*Visit USA Committee France has conducted a survey among its B2C database to measure the impact of the pandemic on their desire to travel to the United States



It is not the fear of catching the virus on the plane or in the US that weights the most on travel decisions to the USA.

- To the query: «What factor impacts or could negatively impact your decision to travel to the USA», the first element is the perception of a mismanagement of the crisis by the USA, followed by a decline in purchasing power due to the crisis. The fear of catching the virus in the United States (13.4%) or during their journey are closing the march (9.5%).



*Visit USA Committee France has conducted a survey among its B2C database to measure the impact of the pandemic on their desire to travel to the United States



FRANCE - FY20 MAJOR ACHIEVEMENTS & ACTIVITIES



Creation and distribution of media e-newsletters and press releases to increase AZ press coverage in France.



Coordination of media trips to give the press and influencers the opportunity to produce unique stories and explore lesser-known regions of Arizona.



Interaction and engagement with key audiences on social media and AOT video content sharing to inspire potential travelers.



Express Conseil is a member of the Visit USA Committee/France on behalf of AOT.



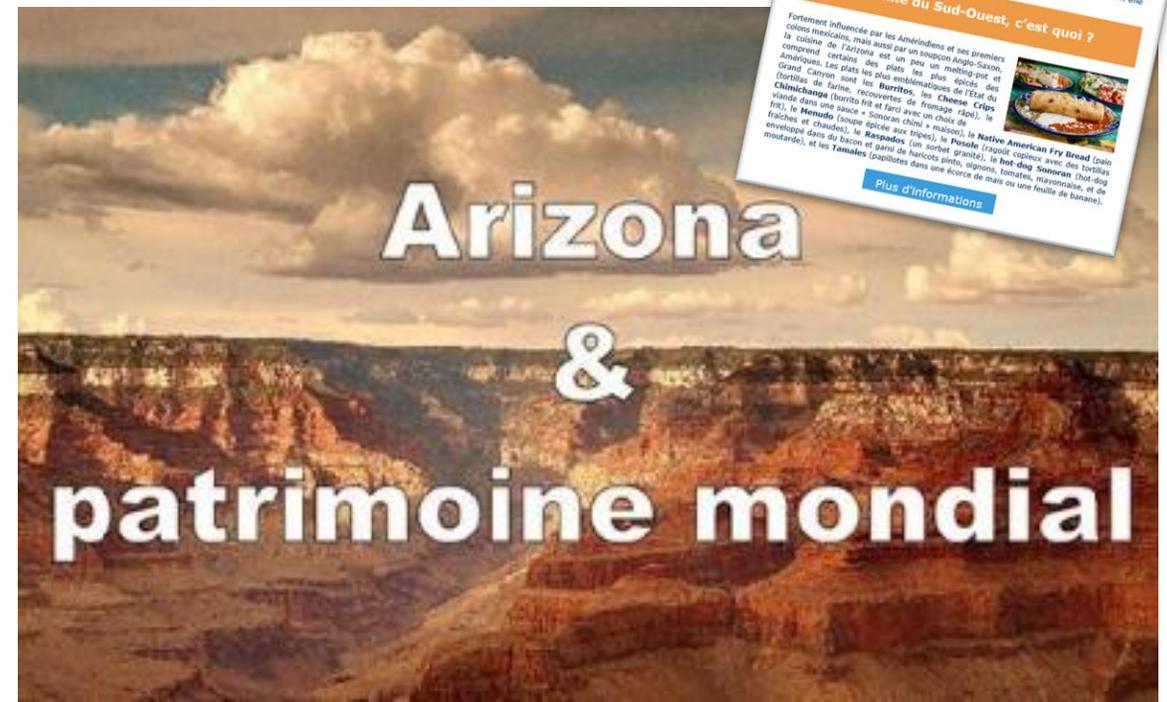
Express Conseil organize and follow-up media/trade missions in France for AOT and partners

MEDIA NEWSLETTERS & PRESS RELEASES

Creation, distribution and medias follow-up of 6 newsletters or press releases in FY20:

- September 2019 “What’s up in AZ” newsletter
- December 2019 “Southwestern Gastronomy” press release
- March 2020 “What’s up in AZ” newsletter
- April 2020 “AZ Dark Sky” press release
- May 2020 “AZ UNESCO designations” newsletter
- June 2020 “AZ Cool Small Towns” newsletter

Average opening rate: 23%



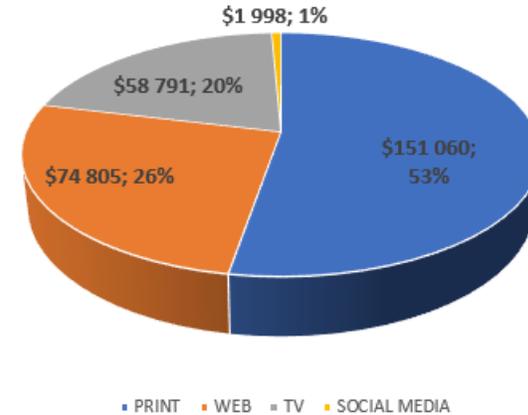
FY20 MEDIA RESULTS

Media Hosted: 4

Total Number of Articles: 14

Total AVE: \$284,656*

Total Reach: 6,034,500



**Several media coverages have been canceled/postponed because of the pandemic situation:*

- **Journal du trek.com:** 2 web articles (Canyon de Chelly, Petrified Forest) - \$5,000
- **Journal du trail:** 2 web articles (Grand Canyon, Javelina Race) - \$5,000
- **Wider Outdoor Magazine:** 1 print article (Javelina Race) - \$42,100
- **Pays et marchés du Monde:** Two 7-minute travel broadcasts on TV5 Monde and France 2 TV channels (Tucson & Sierra Vista) - \$89,000
- **IDEAT:** print article (Frank Lloyd Wright's AZ wonders) - \$21,580/pages
- **Echappées Belles:** 90min AZ dedicated TV program - \$535,000
- **Le Figaro Magazine:** « Arizona Dream » 10-page print-article - \$48,756/pages
- **L'Officiel:** 2 web articles (AZ wine trails & AZ overview) - \$16,800

FY20 MEDIA TRIPS

- **July 30 – August 4, 2019, Xavier Petit (film director):**
 - ***Pays et marchés du monde***: TV program distributed by *TV5 Monde* and *France 2* channels - *TV5 Monde*: 55 million viewers per week (channel general audience) - *France 2 "Pays & Marchés du Monde"*: 750,000 viewers (program's audience)
 - Individual press trip: 2 episodes dedicated to Tucson & Sierra Vista markets
- **September 23 – 29, 2019, Amélie Blondiaux & Benjamin (Influencers):**
 - ***Hellolaroux***: Freelance photographer & travel bloggers. Global audience 50K [Instagram: 43K, Facebook: 3.8K, TripAdvisor: 5.2K, Twitter: 2.6K, Blog 25K unique visitors/month, Pinterest wall: 204K Unique views/ month]
 - Influencer assistance: City break in Tucson
- **December 8 -14, 2019, Thomas Jean (Journalist) & Jean-Claude Figenwald (photographer):**
 - ***IDEAT***: high-end monthly architecture and home decoration magazine – 85,080 copies/250,000 readers
 - Individual press trip: Frank Lloyd Wright and Arcosanti thematic trip



FY20 SAMPLES OF MEDIA RESULTS

LE JOURNAL DES
FEMMES

L'Arizona, aux Etats-Unis



Traversé par la fameuse Route 66, idéale pour un road trip en amoureux, l'Arizona offre une vue spectaculaire sur la Voie lactée tout au long de l'année. Pour profiter de cet impressionnant ballet d'étoiles qui se confond à l'horizon avec le territoire sauvage, faites une halte au Fairmont Scottsdale Princess, un véritable oasis au cœur du désert de Sonora.
© Fairmont Scottsdale Princess

July 2019 | Web
«AZ romantic road-trip »
article: \$8,135

Destinations de rêve



July 2019 | Web « AZ
Honeymoon » article:
\$12,900

Rolling Stone
ROCK YOUR SUMMER



CULTURE / 29/01/2020

**Freewheelin' Zégut, épisode 9 : la
Mother Road, Arizona**

Nouvelle épisode : Francis Zegut poursuit ses pérégrinations sur la Mother Road. Et qui dit route dit voitures. Arrêt au stand à Seligman, Arizona Comme son prénom...

August 2019 | Web
« AZ mother road »
article: \$13,500

Hellolaroux



Arizona, city guide, ouest américain, voyage aux USA

Quoi faire à Tucson ? — l'héritage mexicain du sud de l'Arizona

Ô Tucson. Celle qu'on surnomme The Old Pueblo, niché entre les montagnes et le désert de Sonora à l'âme résolument [...]

© octobre 26, 2019

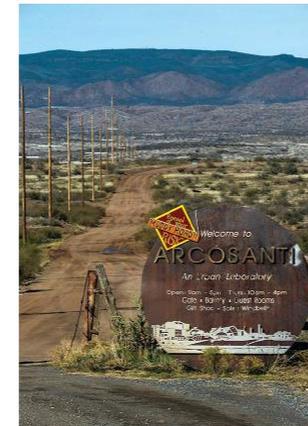
October 2019 | Blog article
«Tucson city-guide» :
\$2,500



Nov 2019 – Jan 2020 |
« Kingman/Monument
Valley/Route 66» 06:30 min
video replay via Air France
on board individual displays:
\$19,597/month



Arcosanti, une cité utopique en plein désert américain



Elle trône en lisière d'un canyon de l'Arizona, au beau milieu des pierres et des cactus. Cette ville « ovnisque » des années 70 s'est choisie la plus aride des géographies, une manière, pour son concepteur, Paolo Soleri, d'expérimenter de nouvelles formes d'urbanité. En marge du monde, plongée dans une cité compacte, durable et visionnaire qui tente de bien vieillir.
Reportage Thomas Jean / Photos Jean-Claude Rigenmald pour IDEAT

Feb 2020 | Print 7-page
« Arcosanti » article:
\$151,060



45. Ambiente, a Landscape Hotel, Arizona, Etats-Unis



Ce projet indépendant est conçu pour se fondre dans le paysage entourant la ville de Sedona, dans l'Arizona, célèbre pour ses formations rocheuses en grès rouge. Les 40 chambres, perchées sur pilotis, ont leurs parois teintées en bronze reflétant les roches rouges et immergeant les clients dans la nature. À l'intérieur, le design est minimaliste afin de laisser toute sa place au paysage. Le projet, local, est monté et dirigé par une famille de Sedona, et créé par les architectes locaux ASUL Architectes. Enfin, un grand respect sera porté à l'environnement, en se concentrant sur des méthodes d'exploitation durables et une alimentation bio.

Ouverture prévue à l'été 2020, repoussée en décembre — Plus d'infos sur www.ambientesedona.com

March 2020 | Web «Hotels: 60 openings expected in 2020» article: \$1,950



Arizona : formidable territoire des nuits étoilées

par Tanquy REVAULT



Pour ceux qui n'ont jamais entendu du mouvement "Dark Sky", il s'agit d'une initiative ayant pour objectif la réduction de la pollution lumineuse. Parmi les nombreux bénéfices, on note notamment l'augmentation du nombre d'étoiles visibles dans la nuit, les économies d'énergie et une meilleure qualité de vie pour les personnes et la faune. L'Arizona compte plus de lieux certifiés "Dark Sky" que n'importe où dans le monde et de nombreuses collectivités dans cet état de l'ouest américain ont obtenu la certification délivrée par L'International Dark Sky Association (Big Park, Camp Verde Flagstaff...). Sans oublier les neuf parcs également certifiés parmi lesquels le Grand Canyon National Park et le Petrified Forest National Park. Preuve que c'est bien en Arizona qu'il faut aller lorsqu'on apprécie les vastes ciels étoilés qui donnent à la nature cet aspect si mystérieux et grandiose. L'Arizona abrite aussi plusieurs observatoires et planétariums et en 2021, l'International Dark Sky Discovery Center devrait ouvrir ses portes à Fountain Hills, avec quatre attractions distinctes et éducatives : planétarium, observatoire, théâtre et une zone immersive proposant des expositions interactives et une expérience recréant un Dark Sky. Plus d'informations sur le [site internet](#) de Visit Arizona.

May 2020 | Web «Arizona: the great Dark Sky land» article: \$2,450



June 2020 | Web « Arizona Stargazing » article and newsletter: \$6,500

FY20 MEDIA TRIPS POSTPONED*



LE FIGARO
magazine

L'OFFICIEL
voyage



- **March 13 - 23, 2020: Echappées Belles (6 person TV crew)**
 - **Echappées Belles**: #1 TV travel program in France – 900,000 average viewers after the 1st broadcast and up to 1.4 million viewers after 2nd broadcast/rerun (program's audience)
 - Local support and itinerary follow-up to create a **90-minute Travel TV program dedicated to Arizona**
- **March 22 to April 2, 2020, Adrien Gombeaud (journalist) & Eric Martin (photograph)**
 - **Le Figaro Magazine**, 1st High-End French Weekly Magazine – 339,546 copies / 1,880,000 readers
 - “**Desert and architecture “ thematic trip**. Accommodation & activities support in **Phoenix, Tucson, Sedona, Flagstaff and Page** aeras
- **March 31 – April 7, 2020, Jean-François Guggenheim (journalist/photographer)**
 - **L'Officiel**, High-end Fashion and Lifestyle Magazine – 75,000 copies / 258,000 readers / Web : 1 million-page views / month, 300,000 unique visitors / month
 - Individual press trip: **AZ wine trails thematic trip** in partnership with United Airlines (complimentary flights)
- **Late June 2020, Laurie Medina (TV documentary creator)**
 - **Voyages Vert Vous**, New travel & sustainability TV program broadcasted via TV5 Monde (International French TV) and France2 (National TV channel)
 - Nothern AZ support to shoot a **Dark Sky episode**



	FY19	FY20	Evolution
Page likes (year end)	5,131	5,282	+2.9%
Followers (year end)	4,913	5,077	+3.3%
Total Reach of the page	N/A	85,649	N/A
Total Engagement (Interactions + clicks)	3,639	6,290	+72%
Videos / minutes viewed	494	773	+56%
Average engagement rate	6%	9,2%	+3,2 pts

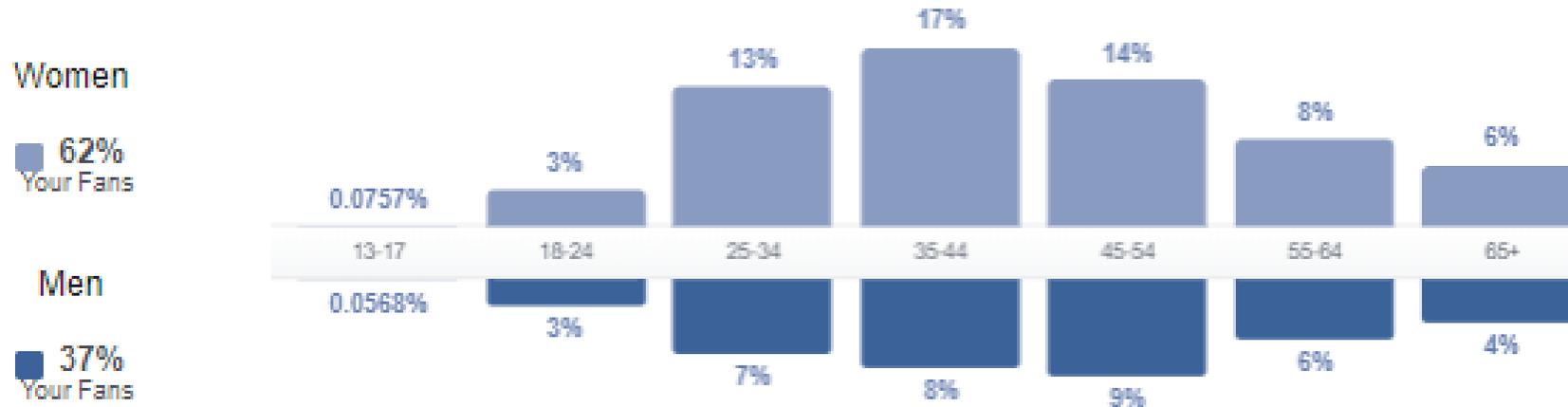


FACEBOOK FIGURES

FY20 Facebook frequency: **2 posts / week**



Fans demographic



INSTAGRAM MERGING

The French page **@arizonatourisme** merged with the global page **@visit_arizona** since August 25th, 2019.



In FY20, Express Conseil shared 11 posts (829 total interactions, 34% average engagement rate)

AOT France c/o Express Conseil



Timothé Rimbault

Account Manager

+33 1 76 47 52 45

t.rimbault@ecltd.com



EXPRESS
CONSEIL

Communiquer à vos côtés



Valérie-Hélène Toutain

Managing Director

+33 6 85 12 97 22

vh.toutain@ecltd.com

32 rue de Ponthieu – 75008 PARIS - FRANCE



@arizonatravel.fr
www.visitarizona.fr

A scenic photograph of an Arizona desert landscape at sunset. The sky is filled with vibrant orange and yellow clouds, transitioning into a darker, cloudy blue at the top. In the foreground, several saguaro cacti are visible, including a large one with five arms in the center, and two cholla cacti on the left and right. The ground is dry and sandy, with some low-lying desert shrubs. In the background, there are rocky hills and mountains under the colorful sky.

Thank You!

ARIZONA
OFFICE OF TOURISM