

Why Travel and Tourism Works for Arizona

- Today's presentation will cover
 - Why tourism is critical to Arizona's economy
 - How impactful Canadian visitation is to Arizona
 - How Arizona Office of Tourism promotes Arizona to the Canadian market.

Arizona Travel Industry Performance

2014

40.7
million

Overnight
Visitors

Up 4.1% YOY

\$20.9
billion

Direct
Spending

Up 5.4% YOY



**\$20.9 billion of direct spending
in Arizona generated...**



\$5.9 billion
employment earnings

Up 6.3% YOY



171,500
industry jobs

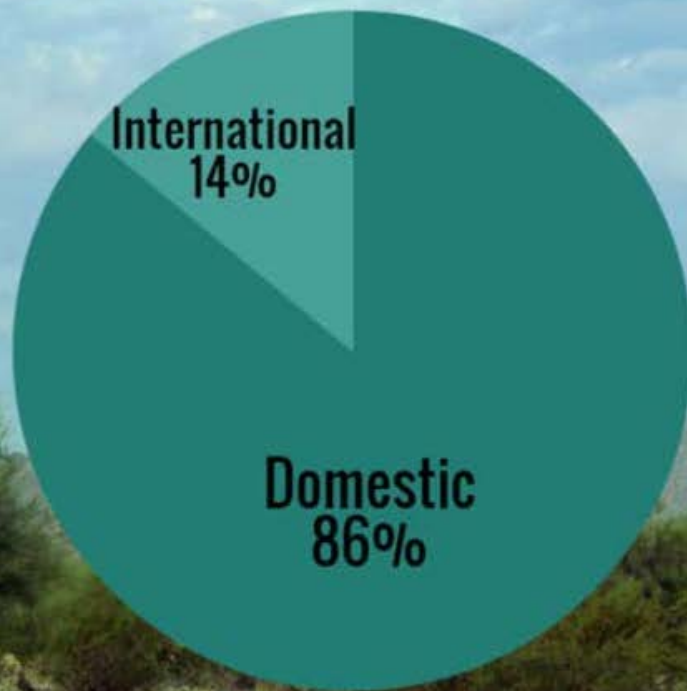
Up 3.8% YOY



\$2.8 billion
federal, state and local
tax revenue

Up 2.8% YOY

Total Overnight Visitation to Arizona



2014

Total Visitation:
40.7 million

↑ 4.1% YOY

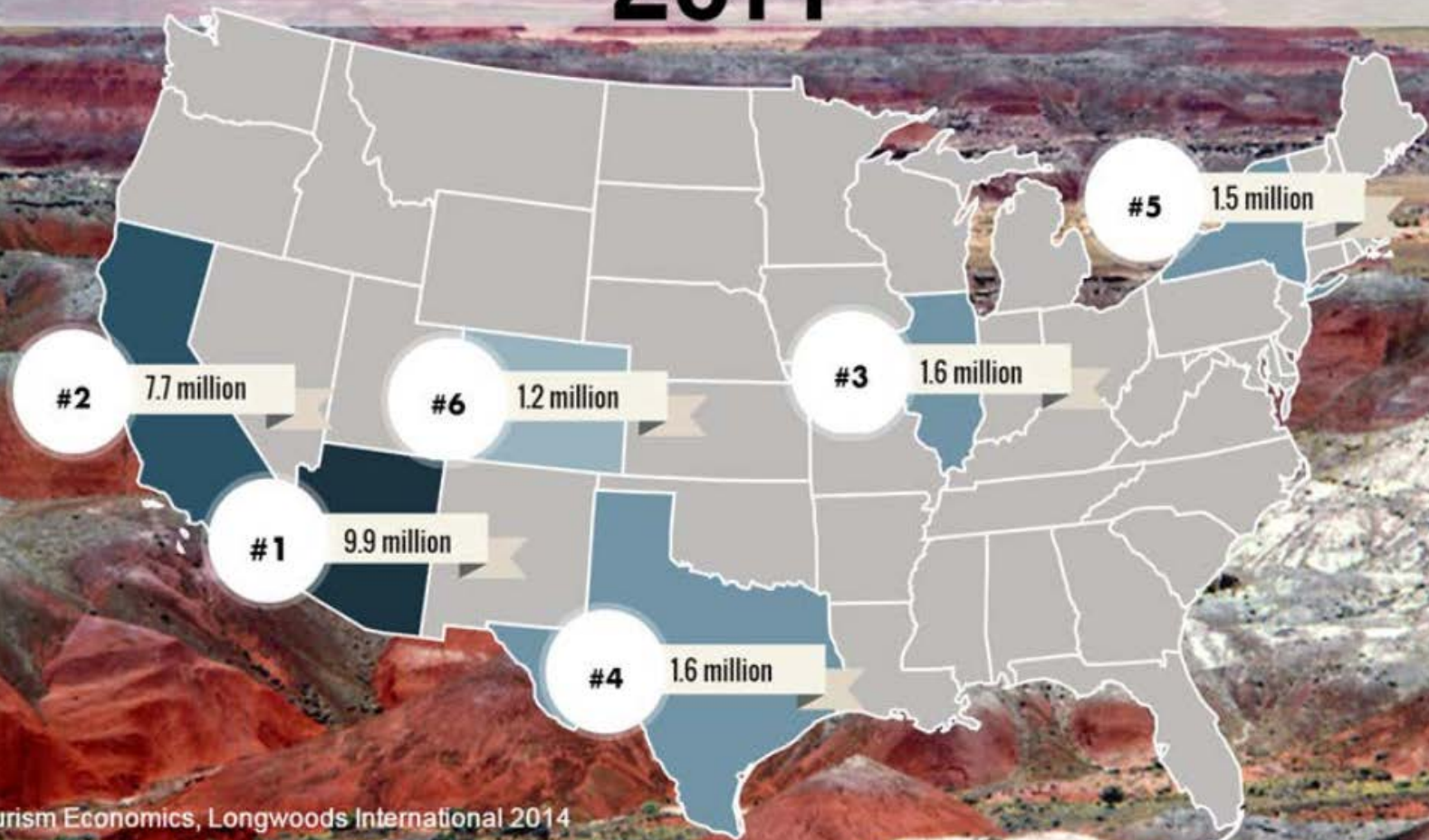
Domestic Visitation:
35.0 million

↑ 3.7% YOY

International Visitation:
5.7 million

↑ 6.3% YOY

Domestic Overnight Visitation 2014



Source: Tourism Economics, Longwoods International 2014

1. Arizona 9.9 M
2. California 7.7 M

3. Illinois 1.6 M
4. Texas 1.6 M

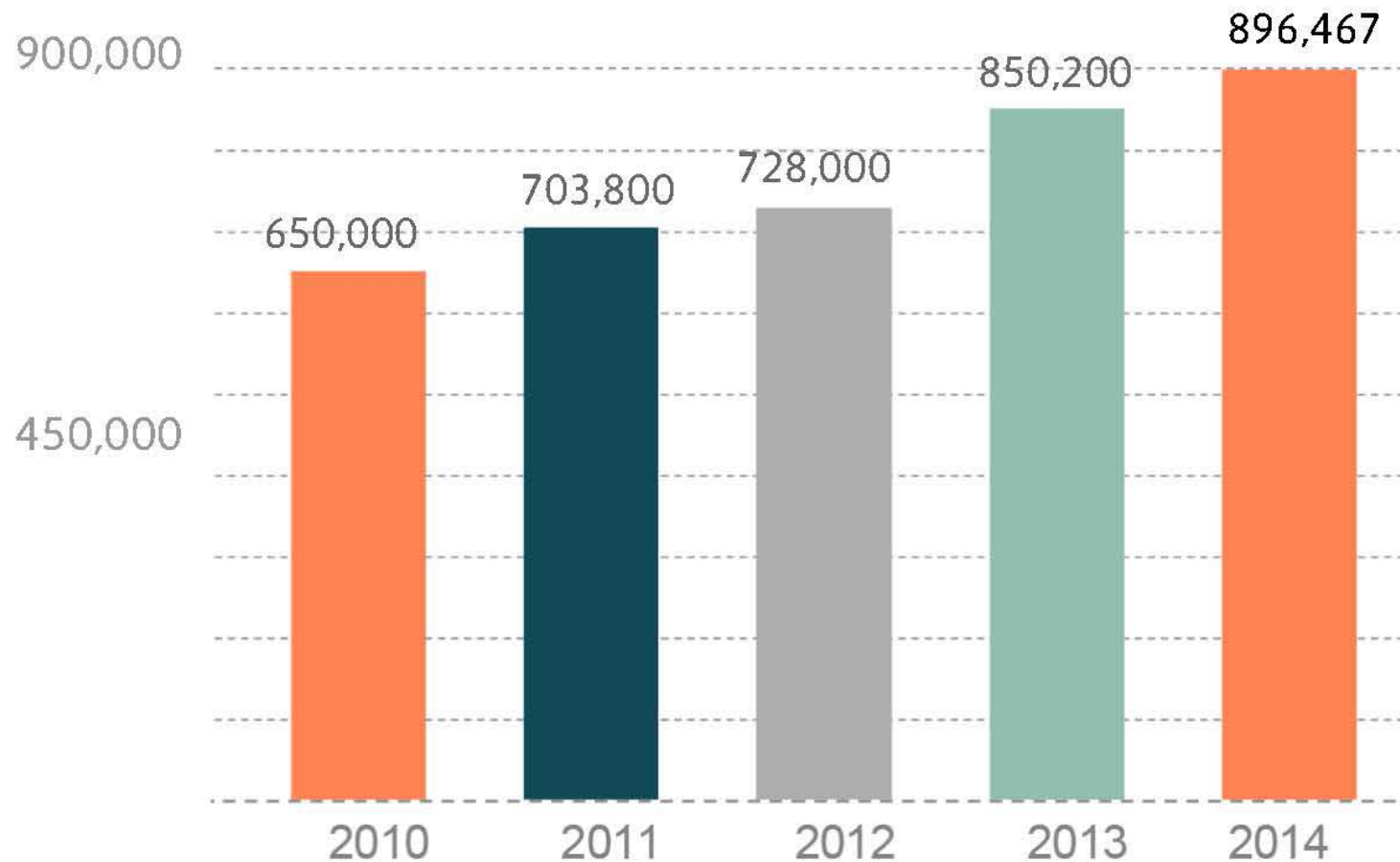
5. New York 1.5 M
6. Colorado 1.2 M

International Overnight Visitation to Arizona



1. Mexico	3.8 million	5. France	113,385	9. Australia	47,535
2. Canada	896,467	6. S. Korea	54,015	10. Switzerland	36,554
3. Germany	127,705	7. China	52,105	11. Brazil	30,992
4. United Kingdom	116,542	8. Japan	51,602	12. Other overseas	321,878

Canadian Visitation Volume to Arizona





Visitation by Province

34% Alberta

23% Ontario

22% British Columbia

7% Quebec

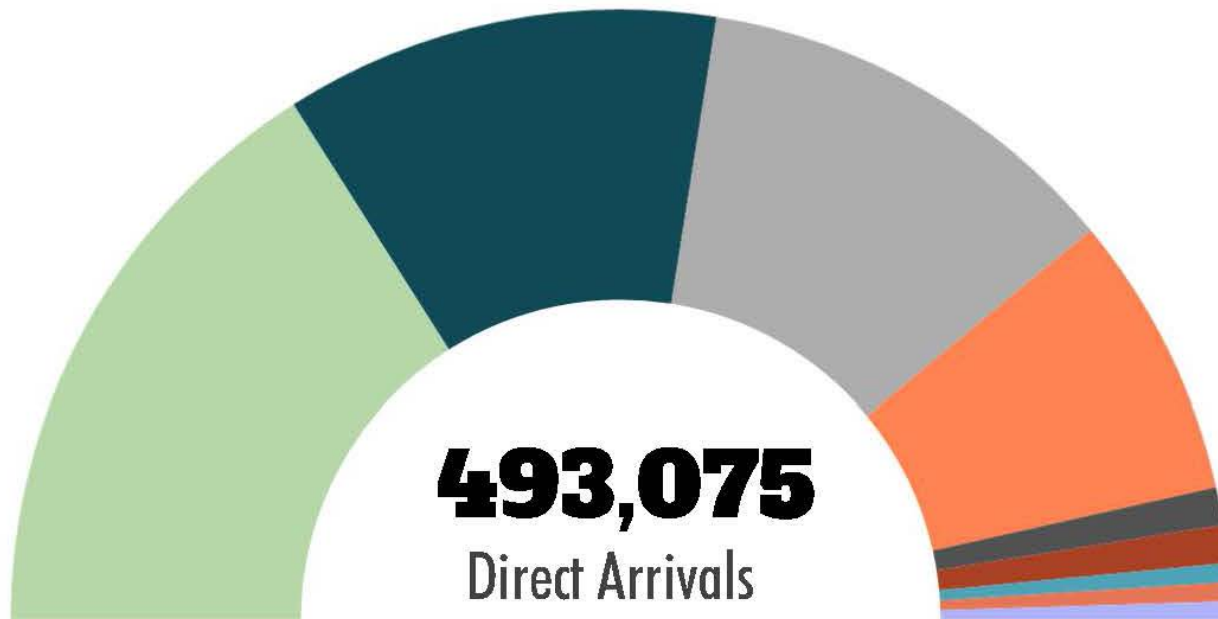
7% Saskatchewan

5% Manitoba

2% Atlantic Canada



AZ Direct Arrivals from Canadian Cities



Calgary: 32%	Toronto: 15%	Saskatoon: 1%
Vancouver: 23%	Winnipeg: 2%	Kelowna: 1%
Edmonton: 23%	Regina: 2%	Victoria: 1%



Main Trip Reason

91% Leisure

54% Vacation Holiday

17% Visit Friends/Relatives

16% Second Home/Cottage/Condo

9% Business

3% Meetings

5% Convention/Conference/Trade Show



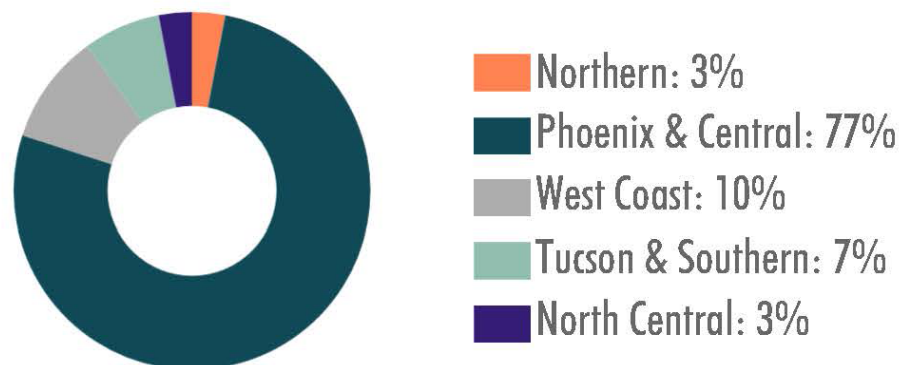
Visa Credit Card Travel Spending

Canadian Visa Card Spending ranked #1 in 2014 with 47% of total International Travel Spending in Arizona.

By Quarter



By Arizona Region



What Canadians love about Arizona

- **Natural Beauty**
 - Desert landscape
 - Sedona Red Rocks
 - Grand Canyon
- **Dining/Gastronomy**
 - Farm-to-table
 - Local foods
 - Wine regions
- **Local Lifestyle**
 - Year-round golf and outdoor activities
 - Unique and authentic offerings
- **Cultural/Historical Attractions**
 - American Indian
 - Old West
 - Architecture
 - Route 66
 - Museums

AOT's Canadian Marketing Efforts

- Advertising
 - Brand USA
- Trade and Media
 - Contract Representation



SOUTHWEST | ARIZONA

Photos clockwise from top:
Grand Canyon National Park;
Lodge at Ventana Canyon, Tucson;
Monument Valley, Navajo Nation

ARIZONA

DESERT ENCHANTMENT

Find beauty and unforgettable activities.

The Grand Canyon, one of the Seven Natural Wonders of the World, belongs on everyone's must-see list. And, this is the year to visit. In 2016, the National Park Service celebrates its centennial and Arizona offers 22 national parks and monuments with special activities and events. Tucked in between all these scenic wonders are more great reasons to visit. Enjoy fun activities such as Jeep tours, cruising around Lake Powell, hiking, biking or skydiving in landscapes from desert floors to alpine forests. Or, be pampered at luxury resorts, stop at a vineyard, dine at local farm-to-table restaurants, fine dining establishments and brewpubs. Uncover the mystique of the Old West or get your kicks on Route 66.

ARIZONA
BRAND CANYON STATE

VisitTheUSA.ca/arizona | VisitArizona.com

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Media Relations

- Canadian Journalists
 - 145 articles
 - \$1,488,529 value
 - 33,130,038 circulation

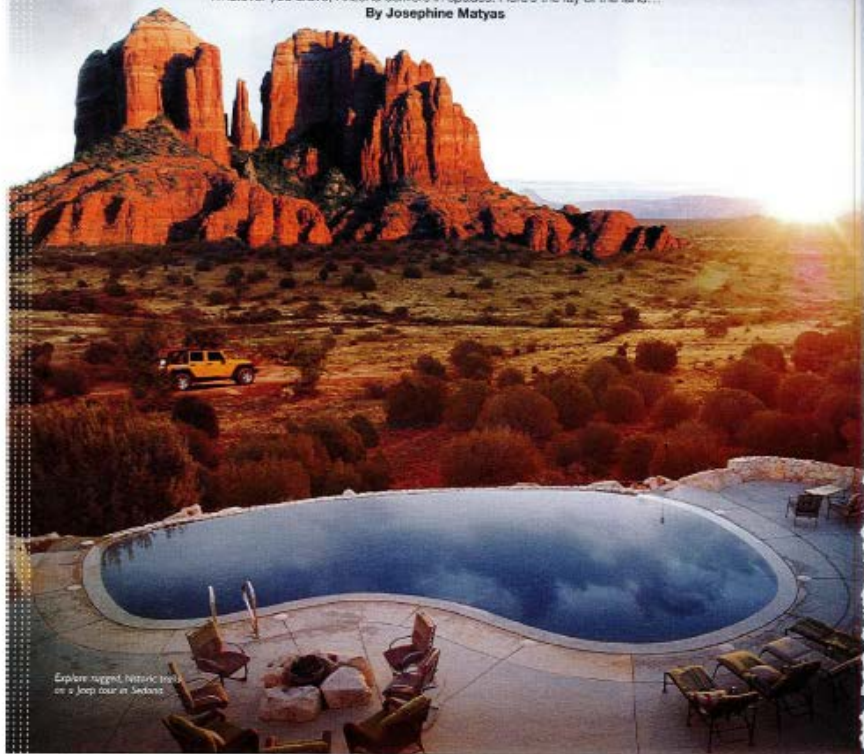


Arizona WELCOME

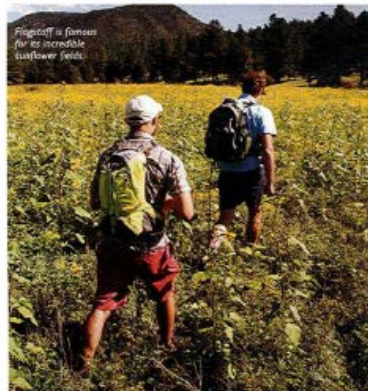
ARIZONA A Warm Welcome

There are few destinations that can promise true diversity—and then deliver on that promise. But Arizona—my “go-to” retreat—is one of them. Looking for fantastic scenery? Think Grand Canyon and Monument Valley. Vibrant culture? Dive into a landscape rich with the legacies of First Nations, American settlers and Spanish conquistadors. Whatever you crave, Arizona delivers in spades. Here’s the lay of the land...

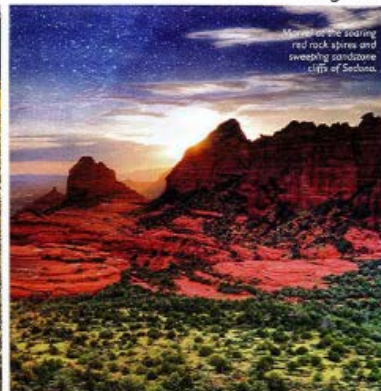
By Josephine Matyas



Explore rugged, historic trails on a Jeep tour in Sedona.



Flagstaff is famous for its incredible sunflower fields.



Monument on the soaring red rock spires and sweeping sandstone cliffs of Sedona.

PHOENIX AND CENTRAL ARIZONA

Everything is close at hand in the Valley of the Sun: outdoorsy pursuits, sporting events, shop-'til-you-drop outlets, foodie destinations, craft breweries and decadent spas. And it's all served up in relaxed southwest style.

Greater Phoenix bundles together a dozen smaller communities, including Mesa, Scottsdale, Tempe, Chandler and Glendale, and each offers a full range of outdoors activities, unique dining, history and culture. It's also a nirvana for golfers, with more than 200 courses of all layouts and skill levels to choose from.

City-lovers will be happy because there aren't enough hours in the day to tour all the world-class museums, art walks, galleries and public art installations. And those craving nature can soothe their souls with road trips, hot air balloon flights, horseback riding, Jeep excursions, river floats, hiking and mountain biking in the Sonoran Desert.

HEAVEN FOR: Busy families, romantic escapes, guys' or girlfriends' getaways and sports nuts needing a big league fix.

WOW FACTOR: Hot air balloon flights at sunrise over the Sonoran Desert come complete with the traditional post-flight Champagne toast or breakfast.

I WASN'T EXPECTING THAT: Some of the desert communities have creatively used cutting-edge design to form urban natural environments with walking trails. The Gilbert Riparian

Preserve even recycles household water into a network of water ponds that attract desert cottontail bunnies and migratory birds.

HOT TRAVEL TIP: There's so much to do in Phoenix itself, but the city makes a perfect home base for day trips to Sedona, the Grand Canyon or the Superstition Mountains.

TUCSON AND SOUTHERN ARIZONA

Southern Arizona is a place where travellers can truly explore the real southwest. It's touched by the magic of the Saguaro-studded Sonoran Desert and it's an intersection for several distinct cultures: First Nations, Hispanic and American settlers. Their influence is found everywhere, from food and architecture, to music and art.

Tucson serves up big city fare in a setting ringed by mountains and stunning desert. It's culture-rich with spots like the Pima Air & Space Museum, Tucson Museum of Art and the Arizona-Sonora Desert Museum, and there are plenty of festivals and artsy neighbourhoods to enjoy too. Foodies will have nothing to complain about while exploring local eateries along the city's “Best 23 Miles of Mexican food,” a culinary marathon of delectable Mexican restaurants.

Art matters in this region. Smaller artisan communities like Tubac and Bisbee are gathering points for painters, sculptors and jewellers looking to set up shop outside the big city, while in

Tucson, many fine art and boutique galleries set art-lovers' hearts aflutter.

HEAVEN FOR: Anyone who wants to experience the very best Mother Nature has to offer—hiking, biking, horseback riding, caving, birding and star-gazing. There's also a lively music and art scene, luxurious spas and wellness retreats, and plenty of places to



Resources

- *AOT in Action* eNewsletter – bi-monthly
- Tourism.az.gov – business site
- Arizona Travel App – research data
- VisitArizona.com – consumer site

