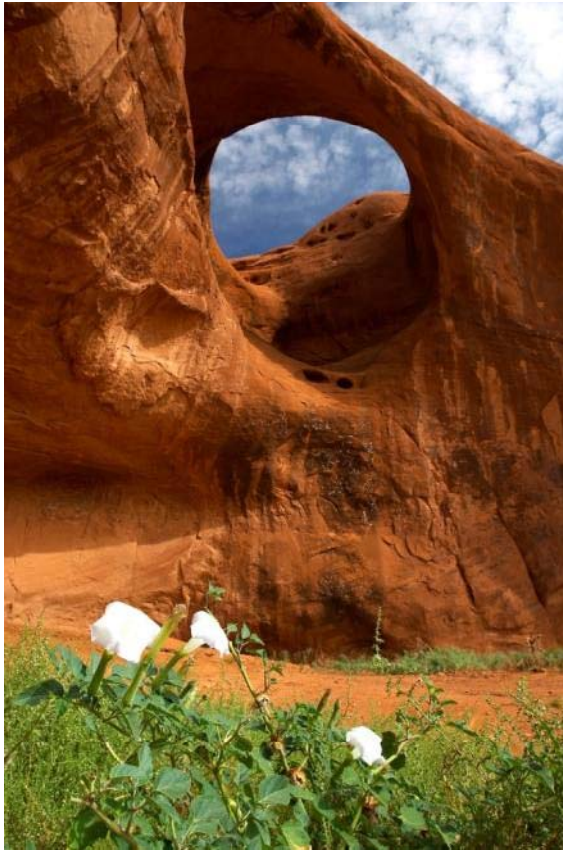


Marketing the State of Arizona


ARIZONA[®]
OFFICE OF TOURISM



Presentation Overview



- Arizona Office of Tourism Overview
- The Economic Impact of Arizona's Travel Industry
- Tourism Opportunities

AOT Mission Statement



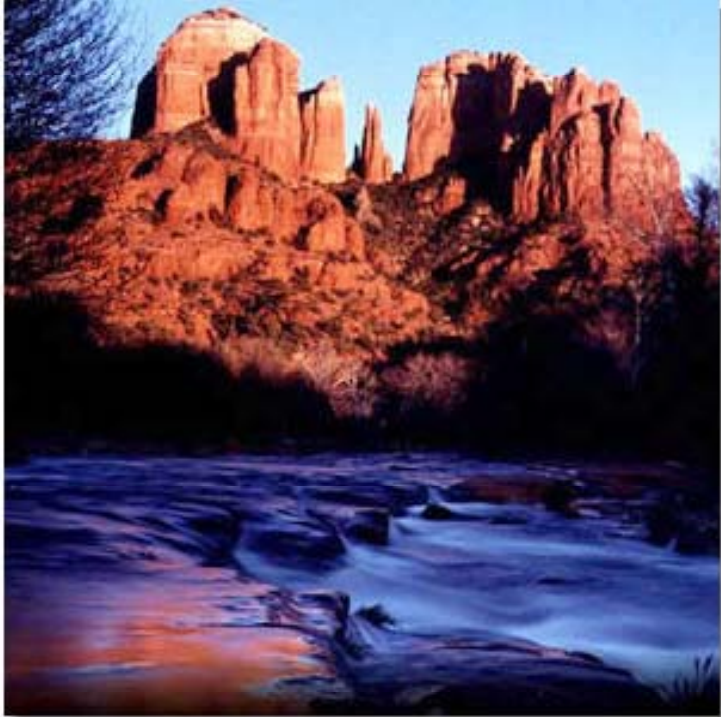
The Arizona Office of Tourism enhances the state's economy and the quality of life for all Arizonans by expanding travel activity and increasing related revenues through tourism promotion and development.

Arizona's Brand Promise



Inspiring
Unforgettable
Southwest
Moments

Arizona's Branding Dimensions



Unexpectedly Exhilarating
Signature Scenery

Rejuvenating Open-Air Lifestyle

Timeless Discoveries

Vibrant Variety

The Five Marketing Regions of Arizona



- Northern Arizona
- North Central Arizona
- Phoenix & Central Arizona
- Tucson & Southern Arizona
- Arizona's West Coast

Advertising and Fulfillment

- Seeks to create a positive brand image for Arizona
- Consumer advertising and promotions



Advertising and Fulfillment

- Print, radio, outdoor boards, internet
- All interactive marketing
- Regional and national campaigns



ArizonaGuide.com

- Travel Information
- Attractions
- Accommodations
- Calendar of Events
- Travel Deals
- Request a Visitors Guide
- Itinerary Builder
- Feature Articles
- Videos



Trade and Media Relations



- Generates positive media coverage in the state's domestic and international markets.



Trade and Media Relations

- Strives to increase Arizona's share in the tourism marketplace by assisting tour operators and travel agents in developing tour and travel programs.
- Assists Arizona DMOs and tourism suppliers in their efforts to target the travel trade.



Communications & Community Development





- Promotes Arizona tourism industry as state's economic driver
- Manages internal communications in cooperation with other state agencies
- Distributes *AOT in Action*

AOT in Action

- Weekly E-Newsletter
- Sent to Constituents
- Letter from the Director
- AOT News
- Upcoming Events & Activities
- Industry News

AOT In Action - Issue 314 - May 3, 2010



Grand Canyon National Park

Message from Director Sherry Henry

Good morning,

The past two weeks have been very challenging for the Arizona Office of Tourism and the tourism industry.

AOT has begun a new chapter under the budget parameters set by the legislature. As a reflection of that, we are realigning our scope of work and that has unfortunately required staff reductions and reorganization. Although change is never easy, our mission remains the same, to promote Arizona as a premier tourism destination. For the [revised staffing contact list](#) please visit www.AZOT.gov. If you have any questions about the reorganization, contact either AOT Deputy Director Mark Stanton (602) 364-3704 mstanton@azot.gov or me at (602) 364-3703 shenry@azot.gov. Moving forward, the team at AOT is committed to our statewide partners and remains focused on projects that best promote the great state of Arizona.

In fact, during the next two months our team will be developing the FY11 action plan. As these plans are finalized we will keep you informed of the details. Concurrently, we will be completing the FY10 plan and the programs which we have scheduled through the end of the fiscal year.

Planning for the July [Governor's Conference on Tourism](#) is in full swing! This conference has never been more important to our industry and we are hopeful you will attend. To find details or register for the conference, please visit www.aztourismconference.com.

Of equal concern over the past two weeks has been the recent immigration law (SB1070). This law has generated a myriad of responses from potential Arizona visitors. We are working closely

Communications & Community Development

- Facilitates Grant and Co-op Marketing Programs
- Arizona Tourism University
- Assists communities to leverage assets and provide technical assistance



Communications & Community Development



- Administers the operations of the Arizona Welcome Centers



- Designates Local Visitor Information Centers – 60 total



Communications & Community Development

- Grand Impressions – Customer Services/Attractions training



- Scenic Byways – Department of Transportation



Native American Programs



AOT is dedicated to integrating and promoting Native American tourism and activities throughout Arizona, as well as providing technical assistance and product development consultation to Tribes.

Research and Strategic Planning

- Conducts Industry Research
- Acts as a clearinghouse and data repository for the research information
- Measures AOT's performance in reaching its goals and objectives



Research and Strategic Planning

All of Arizona's statistical information is posted at www.azot.gov

- Domestic Visitor Profile
- International Visitation
- AZ Airport Passenger Volume
- AZ Lodging Indicators
- AZ National and State Park Visitation

Economic Impact of Arizona's Travel Industry



For each \$1 spent, the Arizona Office of Tourism generated :

- \$180 in direct travel spending
- \$14.95 in state and local taxes

Source: 2007 Longwoods Ad Effectiveness Study

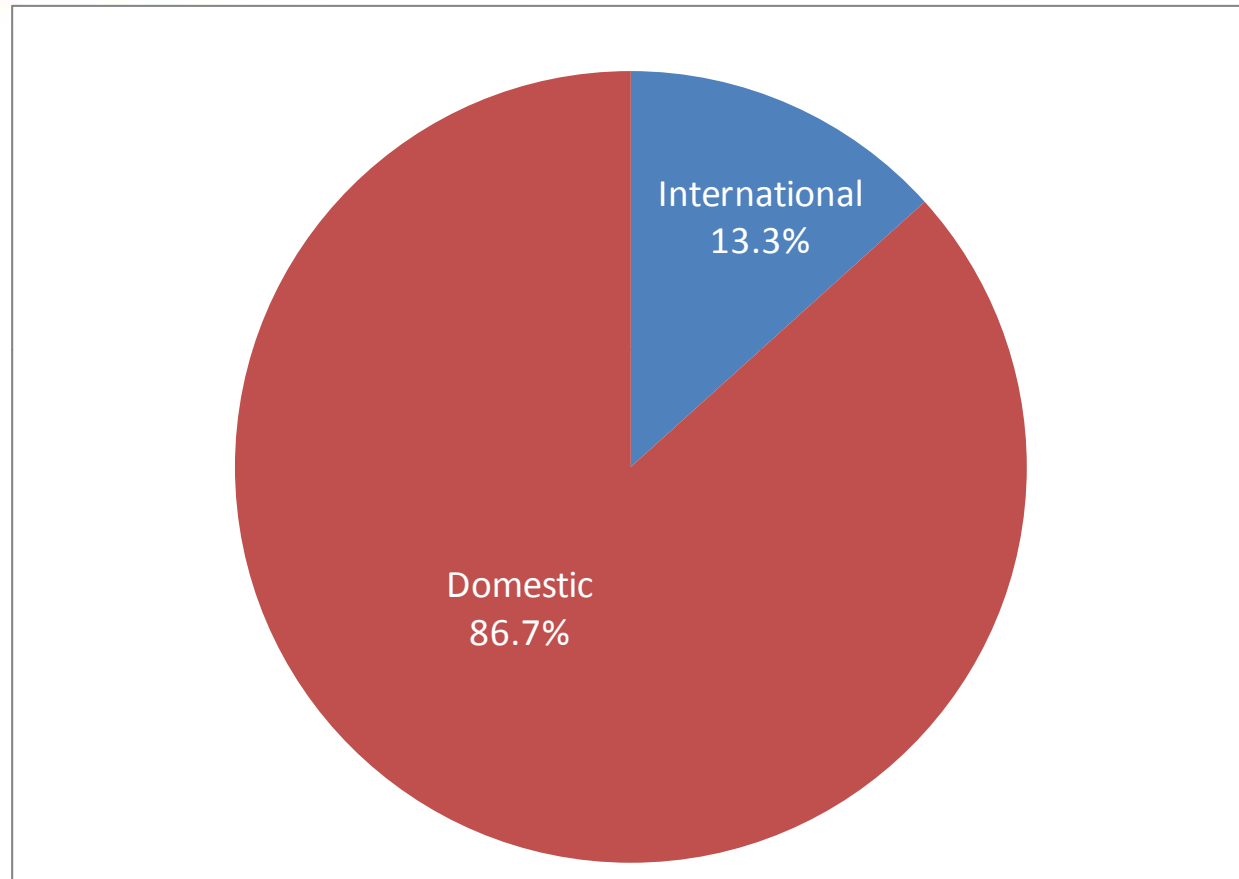
Economic Impact of Arizona's Travel Industry



- 2008 Overnight Visitation
 - 37.4 million
- 2008 Direct Spending
 - \$18.5 billion
- \$51 million being pumped into Arizona's economy *each day!*

Source: Longwoods International , Tourism Economics and Dean Runyan Associates

2008 Total Visitation to Arizona – Market Share

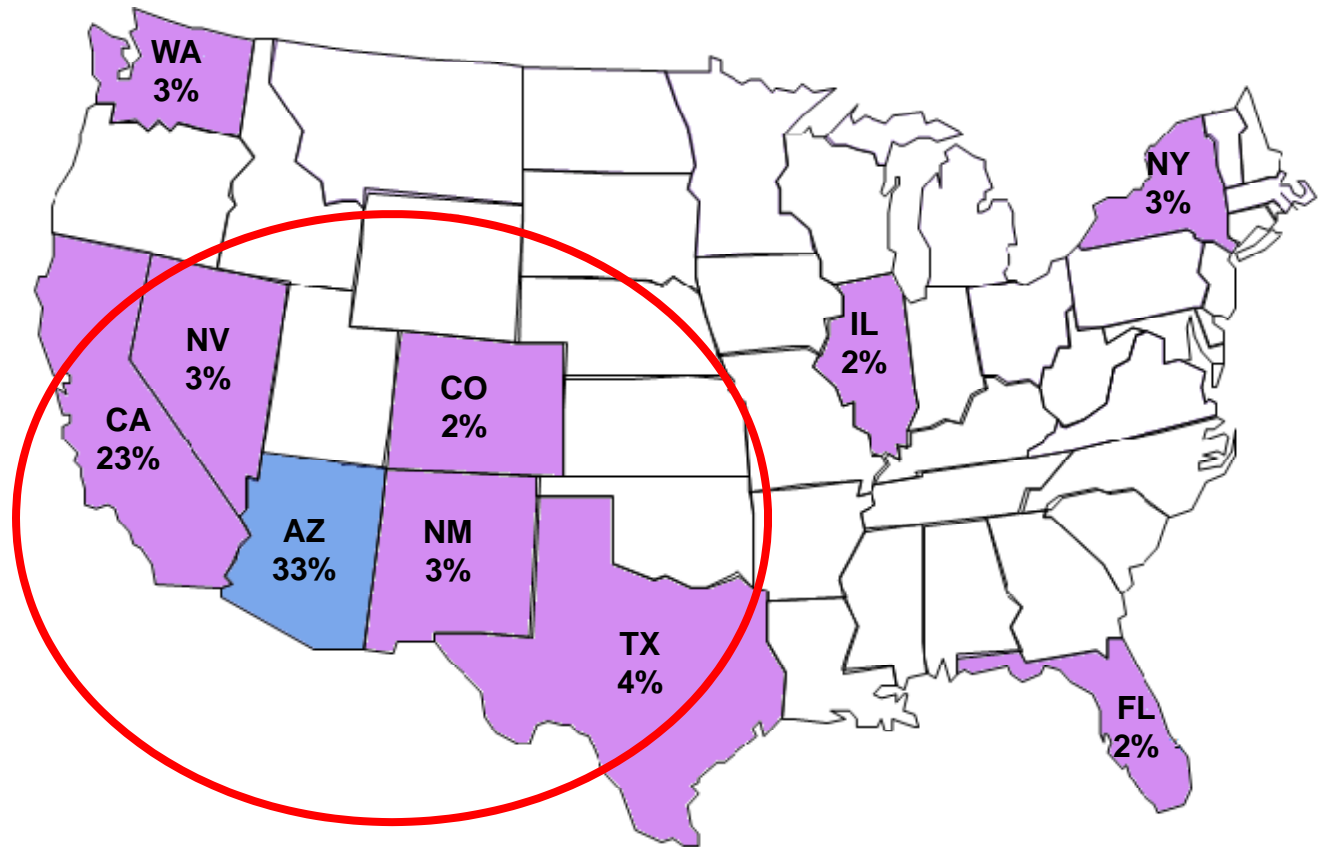


Source: Tourism Economics, Office of Travel & Tourism Industries - U.S. Department of Commerce, 2007-08 Mexican Visitors to Arizona – University of Arizona, Statistics Canada



2008 Arizona Top Origin States (% Person-Trips/Overnight Travel)

1. Arizona	33.3%
2. California	22.6%
3. Texas	3.6%
4. Nevada	3.2%
5. New Mexico	2.8%
6. Washington	2.5%
7. New York	2.5%
8. Illinois	2.3%
9. Colorado	2.2%
10. Florida	2.0%



Source: Longwoods International

International Visitation to the U.S.

Top Origin Markets for International Travelers to the U.S. (2008)

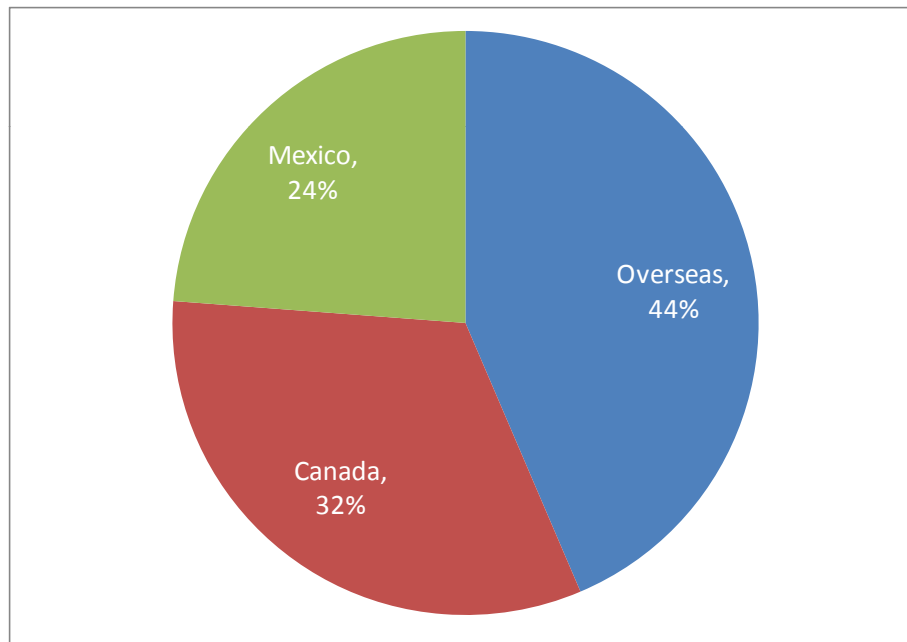
Origin of Visitor	2008 (millions)
1 Canada	18.9
2 Mexico	13.8
Overseas	25.3
3 United Kingdom	4.6
4 Japan	3.2
5 Germany	1.8
6 France	1.2
7 Italy	0.8
8 Brazil	0.8
9 S. Korea	0.8
10 Australia	0.7
International Total	58 million

Source: Office of Travel & Tourism Industries - U.S. Department of Commerce; Secretaria de Turismo (Mexico); Statistics Canada

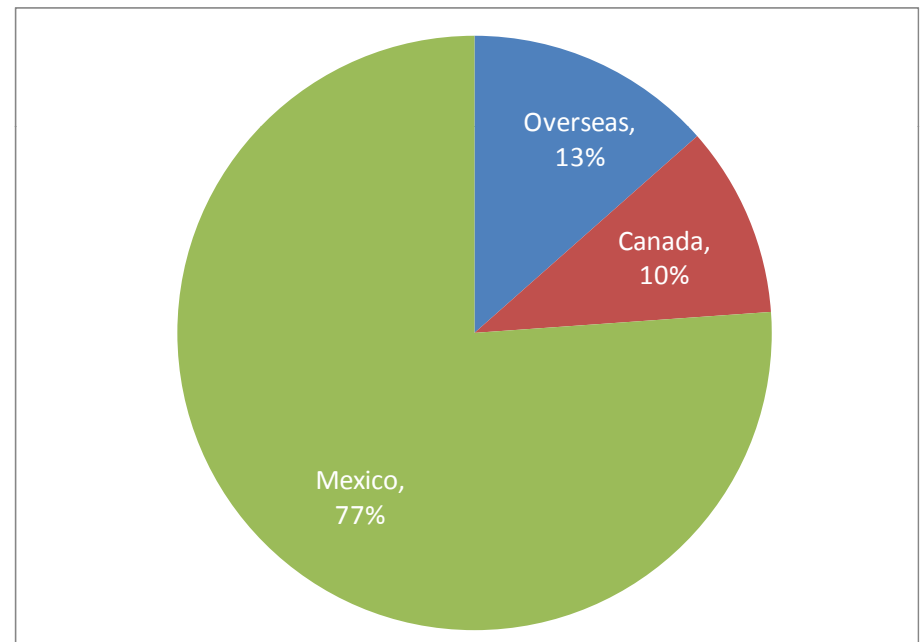


International Market Share – Arizona vs. U.S.

International to U.S 58 million overnight visitors



International to Arizona 5 million overnight visitors

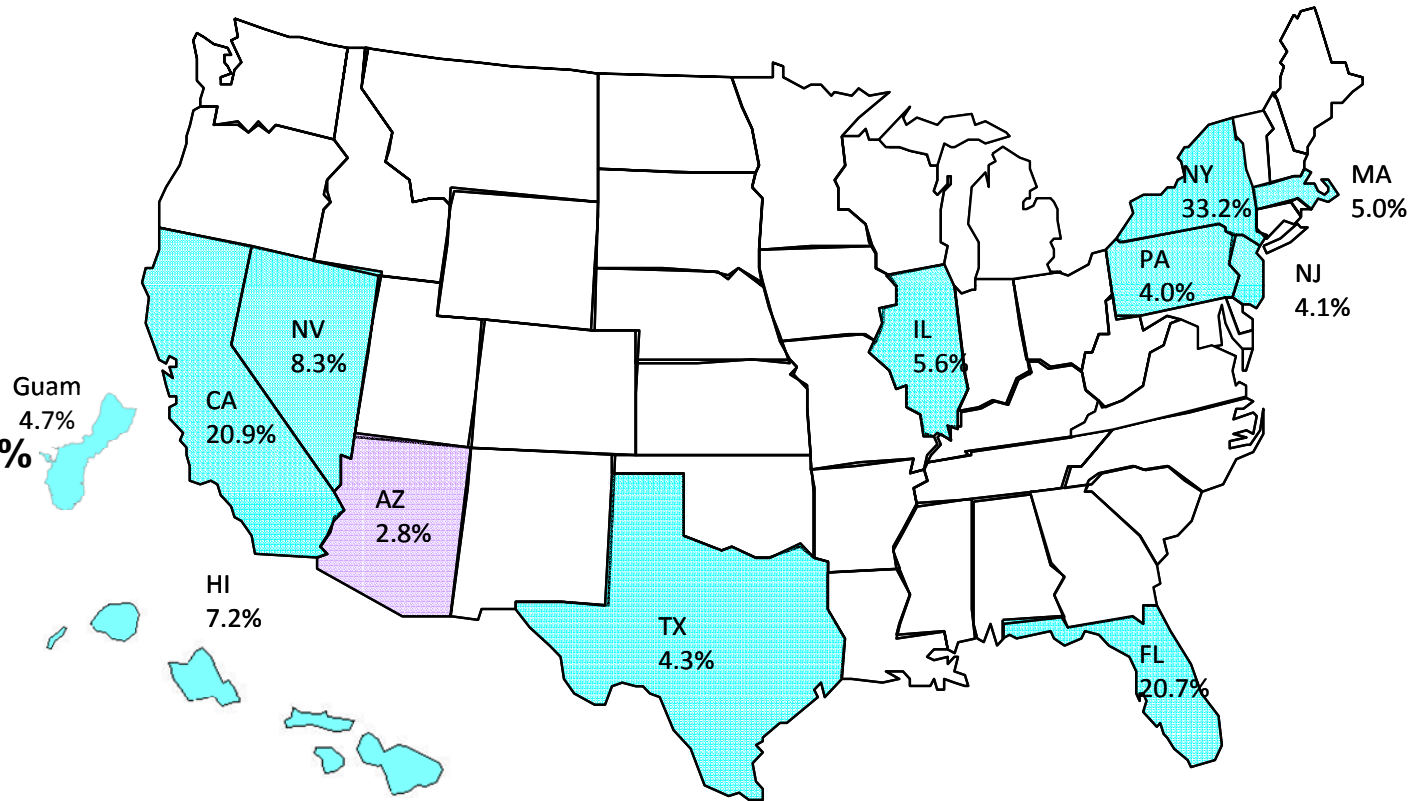


Source: Office of Travel & Tourism Industries - U.S. Department of Commerce, 2007-08 Mexican Visitors to Arizona – University of Arizona, Statistics Canada

2008 Overseas Visitation

U.S. Market Share*

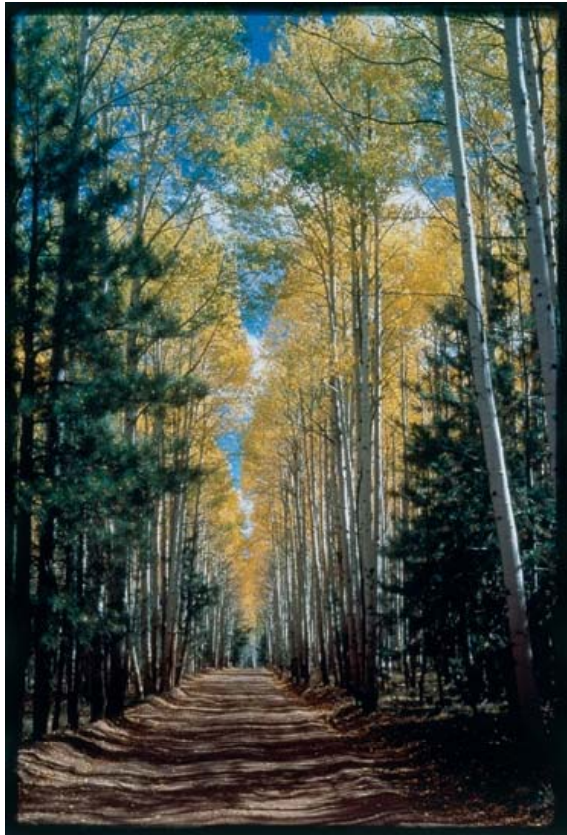
1. New York	33.2%
2. California	20.9%
3. Florida	20.7%
4. Nevada	8.3%
5. Hawaii	7.2%
6. Illinois	5.6%
7. Massachusetts	5.0%
8. Guam	4.7%
9. Texas	4.3%
10. New Jersey	4.1%
11. Pennsylvania	4.0%
12. Arizona	2.8%



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

* Based on Overseas Visitors (excluding Canada & Mexico)

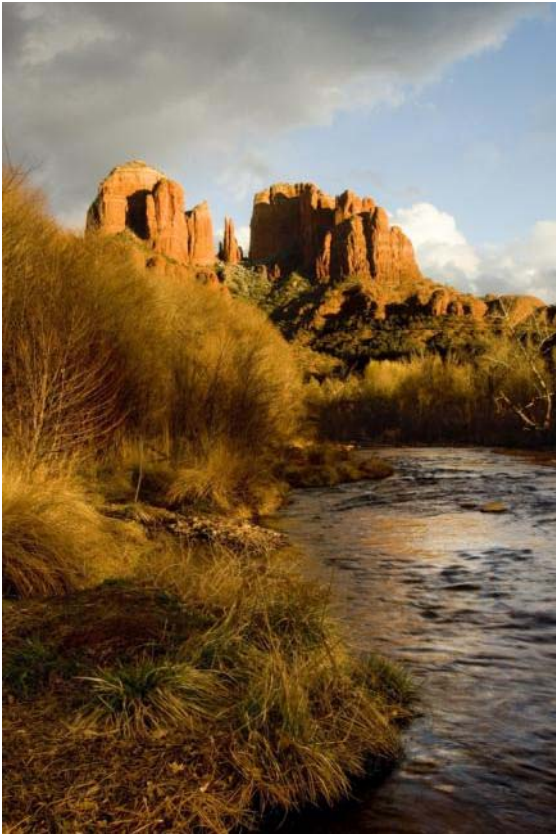
Economic Impact of Arizona's Travel Industry



- Direct Jobs & Direct Earnings
 - 166,900 jobs generated
- Taxpayer Benefit
 - \$2.6 billion generated in taxes

Source: Dean Runyan Associates

Arizona Centennial



February 14, 2012

Available Resources at www.azot.gov

- Media Plans
- Press Trip Updates
- Grant Guidelines
- Research Updates
- ATU Toolkits and Presentations
- AOT in Action Archives
- Staff Directory



Thank You!



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