



EL PASO CONVENTION & VISITORS BUREAU

IN PARTNERSHIP WITH
TEXAS ECONOMIC DEVELOPMENT & TOURISM DIVISION

MEXICO

2019 OVERNIGHT LEISURE VISITOR PROFILE & SHARE OF VISITS

June 2020



Background & Objectives

- The Texas Economic Development & Tourism Division (the Division) has again partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct overnight Mexico leisure visitor profile research.
- The research is designed to provide overnight visitor profile data for trips to Texas cities in 2019.
- The city overnight leisure visitor profile research includes information resources used, trip planning period, month of visit, mode of transportation, travel party, purpose of trip, activities, lodging, trip rating, and visitor spending.
- Each city's share of Texas visits is estimated using the total number of overnight city visits and the total number of overnight Texas visits over a one-year period.
- The following is a review of the 2019 leisure visitor profile for El Paso Convention & Visitors Bureau with comparisons to total Texas city visits.
- Notable differences among El Paso and other Texas cities are highlighted in the report text. These insights represent potential marketing messaging or other strategic opportunities.

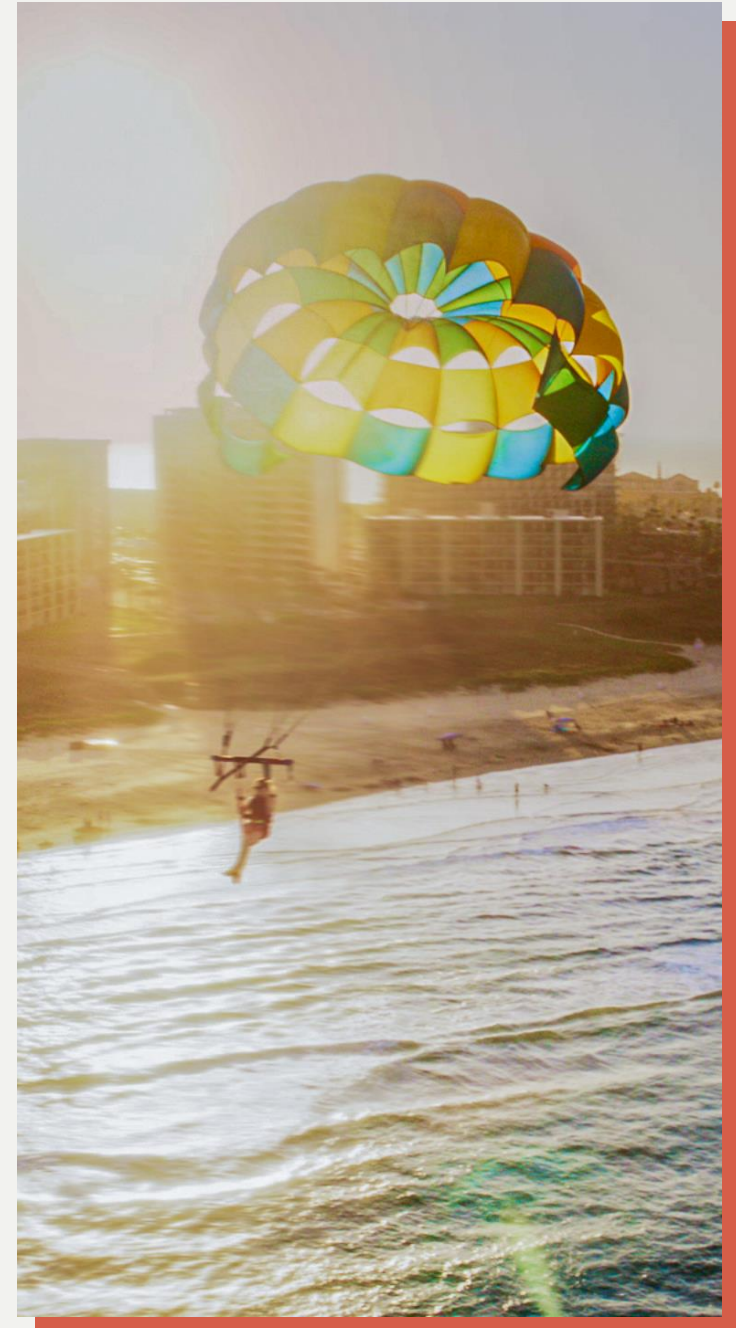
Methodology

- Data were collected via an online survey administered from March 26 to April 6, 2020.
- Respondents were asked about Texas travel in 2019.
- The effort yielded 1,321 completed overnight Texas city visitor surveys – and 364 overnight El Paso visitor surveys.

Market	Border State/Other	Completed Overnight Texas Visitor Surveys	Completed Overnight El Paso Visitor Surveys
Mexico/CDMX	Other	159	29
Nuevo Leon	Border	275	11
Jalisco	Other	58	17
Guanajuato	Other	52	9
Chihuahua	Border	282	215
Coahuila de Zaragoza	Border	97	21
Tamaulipas	Border	170	8
Other	Other	228	54
Total		1,321	364



LEISURE VISITOR PROFILE



Trip Planning Resources

- Word of mouth, Facebook, search engines, and hotel websites are the top information sources when planning 2019 El Paso leisure travel.
- El Paso visitors are less likely than visitors to other Texas cities to rely on most of these information sources, suggesting that the trips are shorter, more frequent visits to a familiar destination.

	El Paso 2019	Total Texas City Visits 2019
Talked to friends or family	57%	54%
Facebook	26%	23%
Search engines such as Google, Bing or Yahoo!	23%	30%
Hotel website(s)	21%	22%
Online travel agent such as Best Day, Despegar, or Price	11%	18%
Travel review sites such as TripAdvisor.com	9%	15%
The printed Texas travel guide	8%	9%
The Texas travel website, www.TravelTexas.mx	7%	12%
Airline website(s)	7%	14%
Website of the specific Texas city you visited	6%	11%
Traditional travel agency	4%	9%
Travel book(s)	3%	5%
The Texas travel email newsletter	3%	5%
Other	1%	2%

Advance Booking

- El Paso trips are booked closer to the trip than are trips to other Texas cities. This again suggests smaller, shorter trips that require less planning.

	El Paso 2019	Total Texas City Visits 2019
0-13 days prior	60%	39%
14-30 days prior	17%	23%
31-60 days prior	13%	20%
61-90 days prior	5%	10%
Over 90 days prior	5%	9%

Mode(s) of Transportation

- Most El Paso visitors use a personal vehicle to get to the city.

	El Paso 2019	Total Texas City Visits 2019
Airplane	11%	18%
Personal vehicle	87%	71%
Rental vehicle	7%	8%
Bus	3%	5%
Other	0.3%	3%

Travel Party

- El Paso travel parties are mostly couples or small groups/families of 3-4 people.

	El Paso 2019	Total Texas City Visits 2019
1 person	9%	10%
2 people	30%	27%
3-4 people	44%	42%
5-7 people	15%	17%
8+ people	2%	4%

- El Paso travel parties do not differ notably from parties to other Texas cities.

	El Paso 2019	Total Texas City Visits 2019
My spouse/partner	60%	65%
My children	36%	38%
My grandchildren	1%	1%
Other family members	37%	34%
Friends	12%	13%

Month of Visit(s)

- Like other Texas city leisure trips from Mexico, El Paso overnight leisure trips show spikes in April, July, and December. The April spike coincides with Easter travel, while Christmas helps to explain the December spike. The July spike is likely peak summer travel season.
- All months are higher than the total, again suggesting higher frequency.

	El Paso 2019	Total Texas City Visits 2019
January	18%	9%
February	13%	8%
March	13%	9%
April	18%	16%
May	13%	10%
June	11%	11%
July	19%	18%
August	17%	12%
September	17%	10%
October	14%	8%
November	17%	11%
December	25%	18%

Seasonality

- Seasonal visitation rates higher than the average suggest that El Paso visits occur more frequently than visits to other Texas cities.

Season of Visit	El Paso 2019	Total Texas City Visits 2019
Winter (Dec-Feb)	46%	30%
Spring (Mar-May)	35%	32%
Summer (Jun-Aug)	38%	36%
Fall (Sep-Nov)	37%	26%

Trip Purpose

	El Paso 2019	Total Texas City Visits 2019
Shopping	46%	29%
Getaway weekend	38%	28%
Vacation	32%	52%
Visiting friends or relatives	31%	30%
Special occasion such as a wedding or reunion	7%	7%
Combining business with leisure	6%	7%
Concert	6%	4%
Festival/fair	3%	3%
Medical/healthcare	2%	2%
Other	2%	2%
Professional sporting event	1%	3%
Education	1%	1%
Amateur sporting event	1%	1%
To embark on a cruise	0.3%	0.5%

- Shopping is the top reason that Mexicans visit El Paso for leisure.
- El Paso is above average for shopping and getaway weekends, and below average for vacations.

Trip Activities

Activity/Attraction	El Paso 2019	Total Texas City Visits 2019
Shopping malls	49%	45%
Outlet shopping	45%	38%
Discount stores such as TJ Maxx, Walmart, and Ross	42%	31%
Shopping at unique local shops	21%	17%
Unique local dining	15%	15%
Night life	13%	18%
Zoo/aquarium	13%	14%
Historic attractions/sites	11%	18%
Prestigious restaurants	10%	10%
Live music	9%	8%
Visit national parks/monuments	8%	16%
Outdoor activities (hiking, biking, camping, etc.)	7%	9%
Black Friday shopping	7%	5%
Summer break celebration	7%	7%
Museum or art exhibit	6%	11%
Christmas celebration	5%	5%

Activity/Attraction	El Paso 2019	Total Texas City Visits 2019
Luxury shopping	4%	6%
Theme/amusement/water park	4%	11%
Food fair	4%	5%
Festival/fair	4%	5%
Professional football	2%	4%
Lake or river waterfront	2%	7%
Theater or dance performance	2%	3%
Easter celebration	2%	3%
Professional baseball	2%	3%
Vineyard	1%	2%
Professional golf	1%	1%
Beach	1%	8%
Professional tennis	1%	1%
Professional basketball	1%	2%
Mexican Independence Day celebration	1%	2%
F1/NASCAR	1%	1%

- The various forms of shopping top the list of El Paso trip activities.

Motivating Trip Activities

Motivating Activity	El Paso 2019	Total Texas City Visits 2019
Outlet shopping	25%	20%
Shopping malls	23%	16%
Discount stores such as TJ Maxx, Walmart, and Ross	18%	11%
Shopping at unique local shops	8%	6%
Historic attractions/sites	7%	9%
Zoo/aquarium	6%	6%
Night life	4%	5%
Live music	4%	3%
Black Friday shopping	4%	3%
Visit national parks/monuments	3%	7%
Summer break celebration	3%	4%
Christmas celebration	3%	3%
Museum or art exhibit	3%	5%
Prestigious restaurants	3%	4%
Unique local dining	2%	4%
Food fair	2%	2%

Motivating Activity	El Paso 2019	Total Texas City Visits 2019
Outdoor activities (hiking, biking, camping, etc.)	2%	3%
Theme/amusement/water park	2%	6%
Festival/fair	1%	2%
Luxury shopping	1%	3%
Lake or river waterfront	1%	3%
Professional football	1%	2%
Theater or dance performance	1%	2%
Easter celebration	1%	1%
Beach	1%	5%
Mexican Independence Day celebration	1%	1%
Professional basketball	1%	1%
F1/NASCAR	0.27%	1%
Professional golf	0.27%	0.32%
Professional tennis	0.27%	0.39%
Professional baseball	0.27%	2%
Vineyard	0.00%	1%

- Shopping drives trips to El Paso.

Length of Stay

- On average, 2019 El Paso visits are shorter than other Texas city visits.

	El Paso 2019	Total Texas City Visits 2019
Average nights spent in city	1.96	2.33

- About half of overnight El Paso trips are just one or two nights, consistent with the relatively high percentage of “getaway weekends” shown previously.

	El Paso 2019	Total Texas City Visits 2019
1 night	27%	22%
2 nights	24%	23%
3-4 nights	23%	27%
5-7 nights	11%	16%
8+ nights	15%	12%

Accommodations

- Most overnight El Paso visitors stay in a hotel.
- El Paso does not differ notably from other Texas cities in terms of the type of accommodations that visitors use.

	El Paso 2019	Total Texas City Visits 2019
Hotel/motel	91%	90%
Bed & breakfast	11%	11%
Home sharing such as Airbnb or HomeAway	7%	7%
Resort	3%	3%
Rental home	1%	2%
Campsite	1%	1%
RV	0.5%	0.4%

Frequency & Cities per Trip

- El Paso visitors came to the city an average of 2.30 times for an overnight visit in 2019. This is a great deal above average frequency for overnight Texas city visitation.
- El Paso visitors go to an average of 1.75 Texas cities while on their trip – fewer than the average for other Texas cities.

	El Paso 2019	Total Texas City Visits 2019
Avg. # of Overnight Leisure Trips	2.30	1.44

	El Paso 2019	Total Texas City Visits 2019
Avg. # of Texas Cities Visited on Overnight Leisure Trip	1.75	2.38

Trip Rating

- El Paso visitors are satisfied with their trips, but El Paso gets fewer “excellent” ratings than other Texas cities. This is expected given that El Paso visits are primarily for shopping rather than other recreation that would drive stronger trip ratings.

	El Paso 2019	Total Texas City Visits 2019
Poor/Terrible	1%	0.50%
Fair	15%	14%
Good	41%	35%
Excellent	43%	50%

Trip Spending

	El Paso 2019	Total Texas City Visits 2019
Lodging	\$221	\$298
Dining/meals/food	\$294	\$357
Attractions/entertainment/recreation	\$194	\$284
Novelties/souvenirs	\$114	\$191
Shopping	\$556	\$510
Other	\$63	\$90
Total	\$1,443	\$1,729

- Overall, El Paso visitors spend around \$1,400 in the city – lower than the average for other Texas city visits.
- Shopping has the highest average spending of the categories included.

Visitor Demographics

- Demographically, El Paso visitors are younger and have lower income than visitors to other Texas cities.

Age	El Paso 2019	Total Texas City Visits 2019
18-24	20%	18%
25-34	41%	35%
35-44	23%	25%
45-54	12%	16%
55+	5%	7%
Income		
Up to \$3,799 Pesos	2%	2%
From \$3,800 to \$9,799 Pesos	11%	8%
From \$9,800 to \$16,699 Pesos	26%	21%
From \$16,700 to \$50,399 Pesos	48%	47%
From \$50,400 to \$121,999 Pesos	12%	18%
\$122,000 Pesos or more	2%	4%
Education		
Primaria	0.27%	1%
Secunadria	1%	2%
Media Superior o Preparatoria	17%	15%
Superior (Licenciatura)	66%	63%
Posgrado	15%	18%
Doctorado	1%	3%
Kids		
Have kids at home	59%	62%



APPENDIX: CITIES' SHARE OF TEXAS VISITS & TOTAL VISITS ESTIMATE



City Share of Overnight Texas Visits

<i>Total</i>	2019
El Paso	16.7%
San Antonio	16.5%
Houston	15.7%
Dallas	12.9%
McAllen	10.6%
Laredo	7.5%
Austin	4.7%
Other	3.0%
Brownsville	3.0%
South Padre	2.7%
Fort Worth	2.7%
Corpus Christi	1.3%
Galveston	1.2%
Amarillo	1.0%
Lubbock	0.5%

<i>Leisure</i>	2019
El Paso	17.9%
San Antonio	15.7%
Houston	14.7%
Dallas	12.3%
McAllen	11.0%
Laredo	8.1%
Austin	4.7%
Other	3.2%
South Padre	3.0%
Brownsville	2.9%
Fort Worth	2.4%
Corpus Christi	1.2%
Galveston	1.1%
Amarillo	1.1%
Lubbock	0.5%

<i>Business</i>	2019
Houston	22.2%
San Antonio	20.9%
Dallas	16.7%
El Paso	9.3%
McAllen	7.8%
Austin	4.7%
Laredo	4.3%
Fort Worth	4.2%
Brownsville	3.3%
Corpus Christi	1.8%
Other	1.5%
Galveston	1.4%
South Padre	0.8%
Lubbock	0.6%
Amarillo	0.4%