



EL PASO CONVENTION & VISITORS BUREAU

IN PARTNERSHIP WITH
TEXAS ECONOMIC DEVELOPMENT & TOURISM DIVISION

MEXICO

2018 LEISURE VISITOR PROFILE SUMMARY

March 2019

Background & Objectives

- The Texas Economic Development & Tourism Division (the Division) has again partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct Mexico advertising effectiveness and visitor profile research.
- The research effort is designed to provide similar measures to partnering CVBs. El Paso Convention & Visitors Bureau again chose to partner on the project.
- While the primary research objective is to produce a visitor profile, the data is also used to provide additional estimates of visitor share and volume that should be considered in light of other sources where available.
- The leisure visitor profile research captures Texas visitor specifics including information about resources used, booking period, mode of transportation, travel party, month of visit, purpose of trip, activities, length of stay, lodging, trip rating, and visitor demographics.
- Texas cities' share of trips is estimated using the total number of city visits and the total number of Texas visits over a one-year period.
- The following is a review of the 2018 Mexico leisure visitor profile for El Paso Convention & Visitors Bureau with comparisons to prior results.
- Last year, the time frame for which Texas travel was assessed was changed to a single calendar year to make the respondent task simpler. So the first year's results cover the period of March 2016 – March 2017, while the past two years' results cover calendar year 2017 and calendar year 2018.

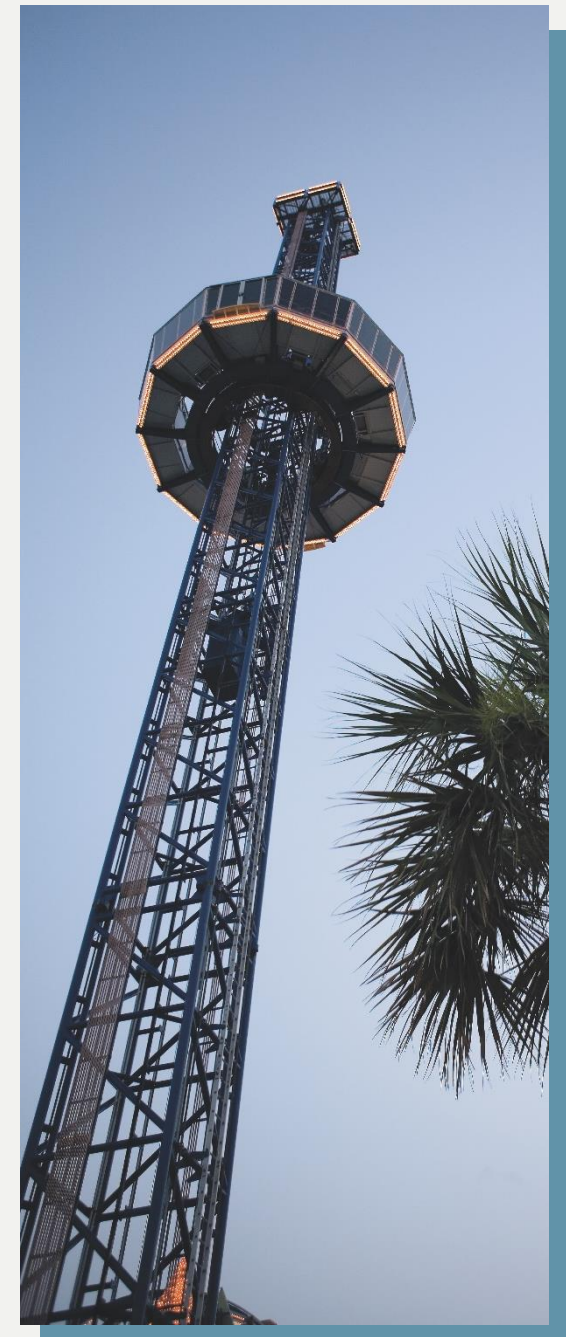
Methodology

- Data were collected via an online survey administered from February 15 to 24, 2019.
- In total, 3,214 surveys were completed.
- The sample is weighted to be representative of the Mexico population distribution.

Markets:	Completed Surveys
Mexico & Distrito Federal	698
Nuevo Leon	215
Jalisco	322
Guanajuato	214
Chihuahua	214
Coahuila de Zaragoza	214
Tamaulipas	214
Remaining	1,123
Total	3,214



LEISURE VISITOR PROFILE



Trip Information Sources

- Word of mouth, Facebook, and search engines remain the top information sources when planning El Paso leisure travel.
- In 2018, 11% of El Paso visitors indicate that they used the city's website.

	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Talked to friends or family	39%	40%	60%	56%
Facebook	18%	22%	28%	24%
Search engines such as Google, Bing or Yahoo!	23%	25%	27%	26%
Hotel website(s)	9%	14%	21%	18%
Travel review sites such as TripAdvisor.com	10%	12%	17%	18%
The Texas travel website, www.TravelTexas.mx	9%	9%	15%	13%
Online travel agent such as Best Day, Despegar, or Price	9%	13%	13%	13%
Airline website(s)	9%	9%	13%	12%
Website of the specific Texas city you visited	14%	13%	11%	15%
The printed Texas travel guide	13%	15%	9%	8%
Traditional travel agency	13%	8%	7%	9%
The Texas travel email newsletter	4%	6%	5%	6%
Travel book(s)	7%	7%	3%	4%
Other	3%	5%	2%	3%

Advance Booking

- Almost all El Paso trips are booked within 60 days of the visit.
- El Paso is again above average on the shortest booking period (0-13 days).

	2017 El Paso	2018 El Paso	2018 City Average
0-13 days prior	47%	39%	37%
14-30 days prior	23%	25%	26%
31-60 days prior	13%	24%	21%
61-90 days prior	12%	7%	7%
Over 90 days prior	6%	5%	9%

Mode(s) of Transportation

- The focus of this research is on visitors – or Texas travelers and their parties. Other data, such as border crossings and modes of transportation, are focused on visits (total individuals). Since a visitor can make multiple visits or represent multiple visits with respect to their travel party, when comparing this data with transportation data it is helpful to consider it in these two ways:
 - Visitors: a traveler to Texas regardless of frequency or party size
 - Visits: the occasions of individual travelers visiting
- In 2018, most El Paso visitors got to the city via personal vehicle (63%) or other ground transportation.
- When accounting for all visits, personal vehicle accounts for 8 in 10 El Paso arrivals.
- El Paso continues to be below average for air travel.

	2017 El Paso Visitors	2018 El Paso Visitors	2018 City Visitors Average
Personal vehicle	47%	63%	51%
Airplane	34%	28%	37%
Rental vehicle	14%	7%	8%
Bus	15%	10%	9%
Train	2%	0.0%	1%

Accounting for travel frequency and party size	2017 El Paso Visits	2018 El Paso Visits	2018 City Visits Average
Personal vehicle	81%	82%	78%
Airplane	18%	11%	15%
Rental vehicle	3%	6%	5%
Bus	8%	4%	6%
Train	0.4%	0.0%	0.1%

Travel Party

- El Paso travel parties continue to be mostly couples or small groups/families.
- In 2018, El Paso is above average for extended family and friends trips.

	2017 El Paso	2018 El Paso	2018 City Average
1 person	8%	10%	9%
2 people	26%	24%	26%
3-4 people	42%	46%	42%
5-7 people	19%	18%	20%
8+ people	5%	2%	3%

	2017 El Paso	2018 El Paso	2018 City Average
My spouse/partner	59%	61%	69%
My children	34%	47%	48%
My grandchildren	1%	2%	1%
Other family members	44%	31%	29%
Friends	13%	15%	11%

Seasonality

- In 2018, the highest rate of El Paso travel again occurred in the summer.
- El Paso continues to be above average compared to other Texas cities for visits during the shoulder seasons (winter and fall).
- Above-average visitation for all seasons suggests that El Paso gets more repeat travel than other Texas cities.

Season of Visit	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Winter (Dec-Feb)	41%	31%	36%	23%
Spring (Mar-May)	23%	27%	36%	34%
Summer (Jun-Aug)	36%	42%	46%	41%
Fall (Sep-Nov)	23%	29%	25%	21%

Trip Purpose

	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Shopping	49%	49%	54%	45%
Visiting friends or relatives	30%	21%	41%	36%
Vacation	NA	42%	39%	49%
Getaway weekend	30%	18%	19%	19%
Special occasion such as a wedding or reunion	15%	8%	9%	9%
Concert	6%	12%	8%	5%
Combining business with leisure	16%	8%	7%	6%
Festival/fair	4%	5%	5%	5%
Other	5%	3%	4%	3%
Amateur sporting event	1%	3%	3%	3%
Education	NA	1%	3%	1%
Medical/healthcare	3%	3%	2%	1%
Professional sporting event	1%	3%	1%	3%
To embark on a cruise	NA	NA	1%	2%

- Shopping, visiting friends/relatives, and vacation are the top reasons for visiting El Paso.

Motivating Trip Activities

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

Motivating Activity	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Shopping malls	23%	23%	30%	27%
Discount stores such as TJ Maxx, Walmart, and Ross	15%	19%	20%	15%
Outlet shopping	23%	17%	17%	13%
Shopping at unique local shops	16%	10%	13%	9%
Historic attractions/sites	4%	6%	10%	14%
Zoo/aquarium	4%	6%	9%	9%
Visit national parks/monuments	NA	3%	8%	9%
Black Friday shopping	5%	5%	7%	5%
Unique local dining	4%	2%	7%	6%
Outdoor activities (hiking, biking, camping, etc.)	5%	4%	6%	5%
Luxury shopping	5%	8%	6%	3%
Night life	6%	6%	5%	6%
Summer break celebration	4%	7%	5%	6%
Christmas celebration	7%	3%	4%	3%
Theme/amusement/water park	1%	1%	4%	7%
Concert, theater or dance	3%	6%	4%	4%
Festival/fair	2%	2%	4%	3%
Museum or art exhibit	4%	1%	4%	5%
Other	1%	2%	4%	3%
Live music	2%	4%	3%	2%
Easter celebration	1%	1%	2%	3%
Professional sporting event	1%	1%	1%	2%
Beach/waterfront activities	1%	3%	1%	5%
Mexican Independence Day celebration	2%	1%	0.3%	1%

Length of Stay

- El Paso visits are average length compared to other Texas city visits.

	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Average nights spent in city	1.9	1.7	2.4	2.4

- In 2018 there are fewer single-night trips than there were the past two years. Trip length is more evenly distributed across the categories in 2018.

	March 2016 – March 2017 El Paso	2018 El Paso	2018 El Paso	2018 City Average
Day trip	16%	16%	14%	16%
1 night	45%	48%	18%	16%
2 nights	15%	15%	17%	19%
3-4 nights	14%	15%	19%	22%
5-7 nights	5%	4%	15%	15%
8+ nights	6%	3%	18%	12%

Accommodations

- Most overnight El Paso visitors stay in a hotel.
- While homesharing and rental homes represent a small proportion of visits, El Paso is above average for these lodging options.

	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Hotel/motel	91%	83%	85%	84%
Bed & breakfast	9%	8%	9%	11%
Home sharing such as Airbnb or HomeAway	0.5%	5%	5%	4%
Rental home	1%	1%	5%	4%
Resort	5%	11%	3%	3%
RV	1%	1%	1%	1%
Campsite	3%	1%	1%	1%

Trip Rating

- El Paso visitors are again satisfied with their trips, as are visitors to other Texas cities. However, El Paso does get a lower percentage of “excellent” ratings than other Texas cities.
- The percentage of El Paso visitors rating their trip “excellent” or “good” increased in 2018. This same phenomenon occurred for other Texas cities, and is likely related to lower expectations given the current political climate.

	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
Poor/Terrible	1%	0.4%	0.7%	0.4%
Fair	15%	15%	6%	7%
Good	41%	39%	46%	40%
Excellent	43%	45%	47%	53%

Visitor Demographics

- Most El Paso leisure visitors are young/middle-aged, middle income, and college educated.

Age	March 2016 – March 2017 El Paso	2017 El Paso	2018 El Paso	2018 City Average
18-24	12%	22%	10%	7%
25-34	31%	31%	25%	22%
35-44	26%	22%	20%	22%
45-54	25%	18%	32%	30%
55+	7%	7%	13%	19%
Income				
Up to \$3,799 Pesos	1%	3%	2%	2%
From \$3,800 to \$9,799 Pesos	11%	8%	8%	7%
From \$9,800 to \$16,699 Pesos	21%	16%	19%	16%
From \$16,700 to \$50,399 Pesos	48%	51%	58%	55%
From \$50,400 to \$121,999 Pesos	16%	18%	10%	15%
\$122,000 Pesos or more	2%	4%	2%	6%
Education				
Primaria	1%	0%	0.0%	0.1%
Secunadria	3%	1%	2%	1%
Media Superior o Preparatoria	9%	13%	12%	12%
Superior (Licenciatura)	54%	56%	64%	60%
Posgrado	31%	22%	17%	22%
Doctorado	2%	8%	5%	5%
Kids				
Have kids at home	62%	61%	58%	57%



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



City Share of Texas Visits

<i>Total</i>	March '16 – March '17	2017	2018
San Antonio	14.7%	14.0%	15.6%
El Paso	13.8%	13.0%	15.2%
Houston	15.7%	17.1%	13.1%
McAllen	12.1%	12.4%	13.0%
Dallas	11.8%	9.3%	11.1%
Laredo	9.5%	10.8%	10.0%
Brownsville	4.9%	4.3%	5.2%
Austin	6.4%	5.1%	4.5%
South Padre	2.9%	2.7%	3.1%
Fort Worth	3.3%	4.1%	3.1%
Other	1.8%	1.0%	2.0%
Corpus Christi	1.3%	2.4%	1.5%
Galveston	1.8%	1.9%	1.4%
Amarillo	NA	1.4%	0.7%
Lubbock	NA	0.4%	0.5%

<i>Leisure</i>	March '16 – March '17	2017	2018
San Antonio	14.9%	14.9%	15.7%
El Paso	13.8%	12.8%	15.4%
McAllen	13.6%	13.1%	13.4%
Houston	14.8%	15.7%	12.4%
Dallas	10.0%	9.1%	10.4%
Laredo	9.8%	11.7%	10.1%
Brownsville	5.0%	4.8%	5.6%
Austin	6.7%	5.1%	4.3%
South Padre	3.5%	3.0%	3.5%
Fort Worth	2.9%	2.9%	3.2%
Other	2.8%	1.1%	1.8%
Corpus Christi	1.3%	2.1%	1.6%
Galveston	2.0%	2.0%	1.3%
Amarillo	NA	1.5%	0.7%
Lubbock	NA	0.3%	0.5%

<i>Business</i>	March '16 – March '17	2017	2018
Dallas	16.1%	12.4%	17.6%
Houston	18.4%	22.0%	17.0%
San Antonio	17.5%	11.4%	15.4%
El Paso	12.3%	11.8%	12.3%
Laredo	9.6%	9.5%	11.1%
McAllen	6.1%	8.2%	9.5%
Austin	4.4%	6.9%	4.8%
Brownsville	6.4%	1.9%	4.2%
Fort Worth	3.7%	6.5%	2.3%
Other	1.2%	0.7%	1.6%
Galveston	1.4%	1.1%	1.2%
Lubbock	NA	0.6%	1.1%
South Padre	1.1%	1.7%	0.9%
Amarillo	NA	2.2%	0.7%
Corpus Christi	1.8%	3.1%	0.5%

El Paso Total Visits Estimate

	March '16– March '17	2017	2018
*Total Texas visits estimate	8,210,000	7,685,000	**8,141,000
Average Texas cities visited per trip	1.88	1.84	1.69
Total Texas city visits	15,449,891	14,168,510	13,735,126
El Paso share of total Texas city visits	13.8%	13.0%	15.2%
Total El Paso visits estimate	2,132,493	1,847,498	2,086,516

*Source: Travel Market Insights Inc.

**Note: 2018 estimate is preliminary and subject to revision.