

CITY OF SCOTTSDALE VISITOR INQUIRY STUDY

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Prepared for
City of Scottsdale

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INTRODUCTION

This study was commissioned by the City of Scottsdale. The primary purpose of this effort was to determine the travel patterns of individuals who contacted the Scottsdale Convention and Visitors Bureau (SCVB) for Scottsdale tourism information. More specifically, this study focused on the following key areas:

- Travel to Scottsdale since contacting the SCVB
- Characteristics of trips made to Scottsdale (length of stay, trip purpose, trip timing, accommodations, travel mode, party configuration, trip spending)
- Activities participated in while in Scottsdale
- Evaluation of Scottsdale as a travel destination
- Sources of travel information
- Internet usage patterns
- Inquirer demographics

This study represents the 18th annual Visitor Inquiry Study commissioned by the City in this series. The information contained in this report is based on 710 in-depth interviews with individuals who contacted the SCVB via either: 1) the call center, a business reply card (BRC) or a reader service listing (RSL) or 2) the Bureau's website. Those individuals who contacted the SCVB via the call center, BRC or RSL were primarily interviewed via telephone survey (120 interviews), while those who made contact via the website were interviewed via a web-based survey (590 interviews).

The sample for this study was segmented to include no less than 175 individuals who contacted the SCVB over each of four specific time periods – April-June 2014, July-September 2014, October-December 2014, January-March 2015.

The telephone interviewing segment of this research was conducted by professional interviewers of the Behavior Research Center during August 2015 at the Center's central location Computer-Aided Telephone Interviewing facility, while the web-based interviewing segment was also conducted during August. Similar to each of the prior surveys, the final study data was weighted to reflect the actual distribution of web and non-web based contacts with the SCVB. The margin of error for this study is approximately +/-3.8 percent at a 95 percent confidence level.

The information generated from this study is presented in three sections. The first section, *Overview*, offers the primary findings of the study in a brief summary format. The second section, *Summary Of Findings*, reviews each study question in detail. The final section, *Appendix*, contains a copy of the survey questionnaire.

The Behavior Research Center has presented all of the data germane to the basic research objectives of this project. However, if the City of Scottsdale requires additional data retrieval or interpretation, we stand ready to provide such input.

BEHAVIOR RESEARCH CENTER

OVERVIEW

KEY STUDY FINDINGS

The overall Scottsdale visitation reading (have visited/will visit) of 85 percent represents an increase from last year's reading of 80 percent and the first year over year increase since 2012. The actual visitation reading of 58 percent represents a 12-point increase from 46 percent last year.

The typical inquirer was 61.1 years old, with 71 percent of all inquirers being 55 years old or older – the first time since the start of these studies that the median age of inquirers has exceeded 60 years. The median age of inquirers has increased from 56.1 to 61.1 over the past five years. In addition, Scottsdale inquirers continue to be an affluent group with a median household income of \$92,000 – down from \$103,900 in 2013 and \$97,400 in 2014.

The median length of stay by Scottsdale visitors is 5.4 nights – unchanged from last year but down from 6.3 nights in 2011.

The typical visitor travel party size is 2.6 persons, down slightly from 2.8 persons last year and 3.0 in 2011.

Fifty-seven percent of visitors stayed in a hotel, motel or resort – down from last year's unusually high reading of 67 percent.

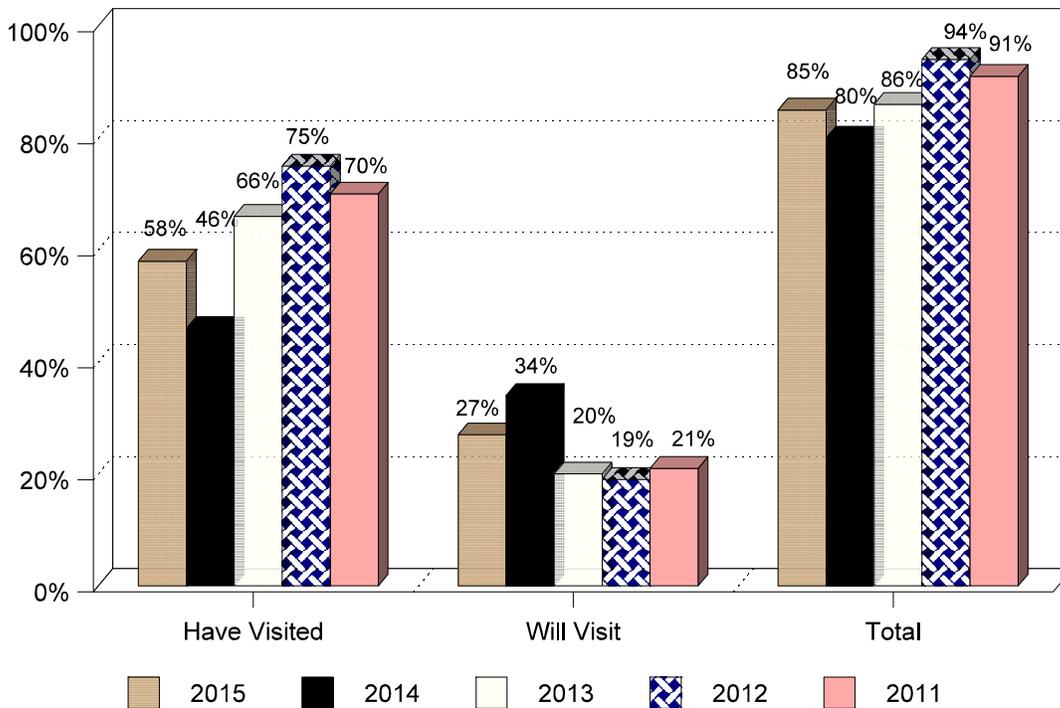
Average daily spending by overnight visitors decreased to \$353 from \$400 last year.

Ninety-five percent of visitors continue to rate Scottsdale as an excellent (49%) or good (46%) vacation destination (little changed from the past several years) and 90 percent would recommend Scottsdale to a friend or family member.

SCOTTSDALE VISITATION PATTERNS (TABLES 1 - 4)

- Fifty-eight percent of inquirers have visited Scottsdale since contacting the CVB, while an additional 27 percent indicate they will visit in the next 12 months. This overall visitation reading of 85 percent represents an increase from last year's reading of 80 percent and the first year over year increase since 2012. Also note that the actual visitation reading of 58 percent is up from 46 percent last year.
- Fifty-five percent of past visitors indicate they will visit Scottsdale again in the next year – in line with prior years.
- Eighty-seven percent of all inquirers have visited Scottsdale at least once during the past three years. Further, 42 percent of inquirers who visited during the study cycle have visited three or more times over the past three years.

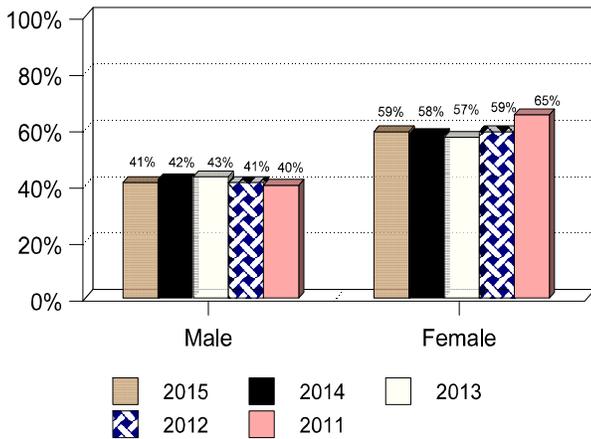
SCOTTSDALE VISITATION PATTERNS



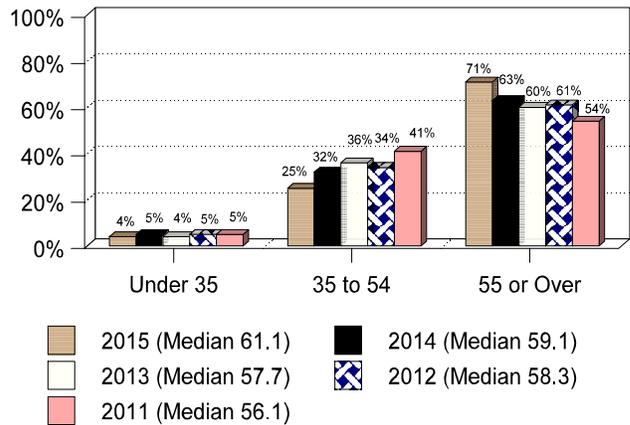
INQUIRER DEMOGRAPHICS (TABLE 5)

- Females account for 59 percent of inquiries – little changed from the past several years.
- The typical inquirer was 61.1 years old, with 71 percent of all inquirers being 55 years old or older – the first time since the start of these studies that the median age of inquirers has exceeded 60 years. The median age of inquirers has increased from 56.1 to 61.1 over the past five years.
- Scottsdale inquirers continue to be an affluent group with a median household income of \$92,000 – a figure which is down from \$97,400 in 2014. Individuals who have visited the city reveal the highest median incomes (\$98,400).
- Twenty-seven percent of inquirers come from the Midwest, 24 percent from the West, 13 percent from the Northeast, 13 percent from the South and 23 percent are foreign.

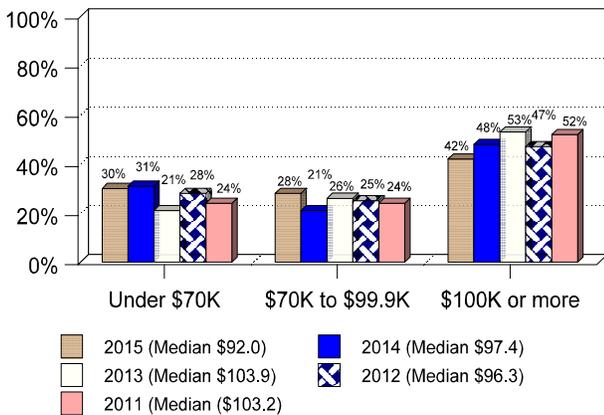
GENDER



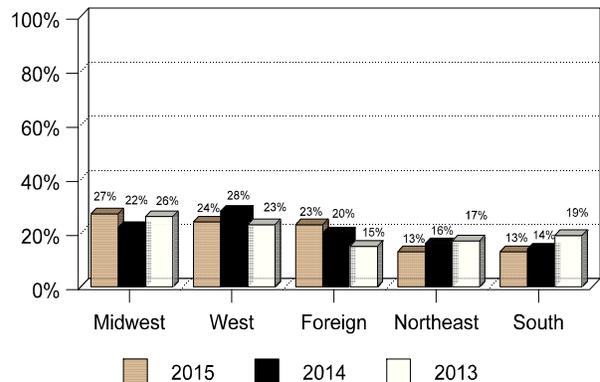
AGE



INCOME



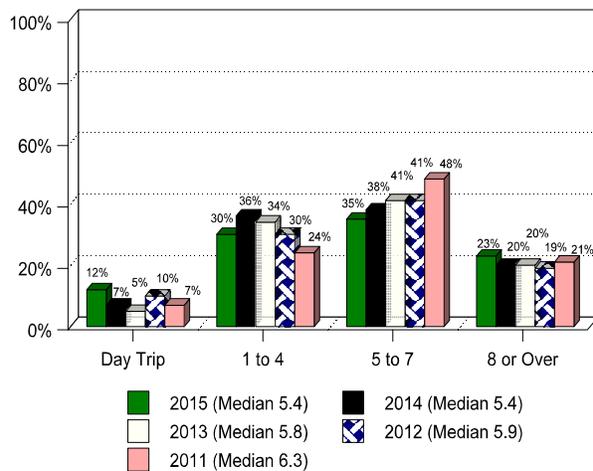
REGION



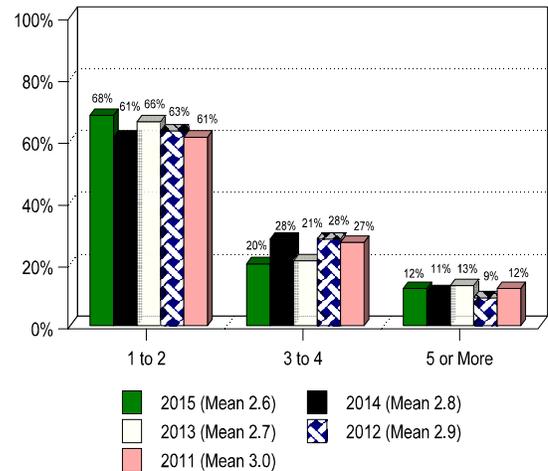
TRIP CHARACTERISTICS (TABLES 6-11)

- The typical visitor to Scottsdale spent 5.4 nights, with 58 percent staying five nights or more. Each of these readings is unchanged from last year.
- The majority of visitors (59%) continue to use a rental vehicle to get around during their visit while 32 percent use their personal vehicle.
- Similar to prior years, 38 percent of inquirers who visited Scottsdale did so during the January to March 2015 period.
- The typical travel party size among inquirers who have visited the city is 2.6 persons, down from 2.8 last year and 3.0 in 2011.
- Fifty-seven percent of Scottsdale visitors stay at either a full-service hotel (24%), a luxury resort (21%) or a limited-service hotel or motel (12%). This overall hotel reading is down from last year's unusually high reading of 67 percent (the highest since 2007).
- The typical overnight Scottsdale visitor party spent \$353 per day while in Scottsdale (down from \$400), while the typical day tripper spent \$155 (down from \$185).

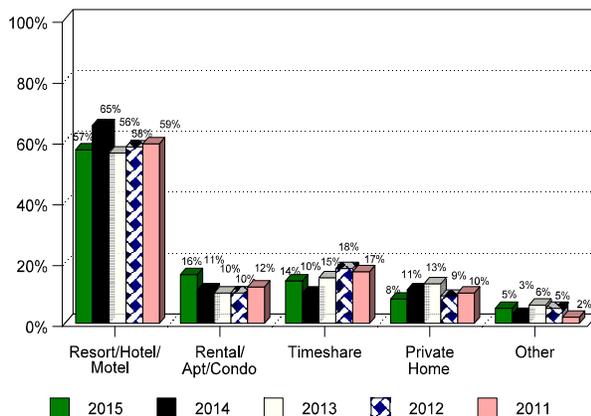
LENGTH OF VISIT



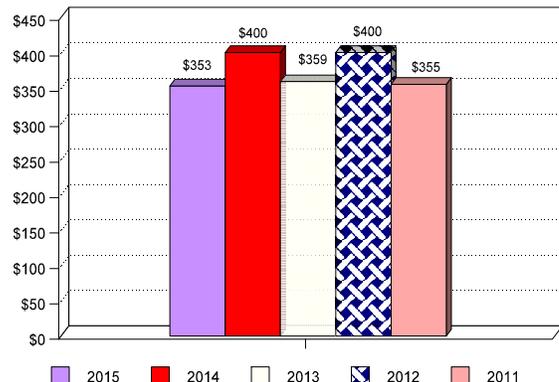
PARTY SIZE



ACCOMMODATIONS



OVERNIGHT VISITOR TRIP SPENDING



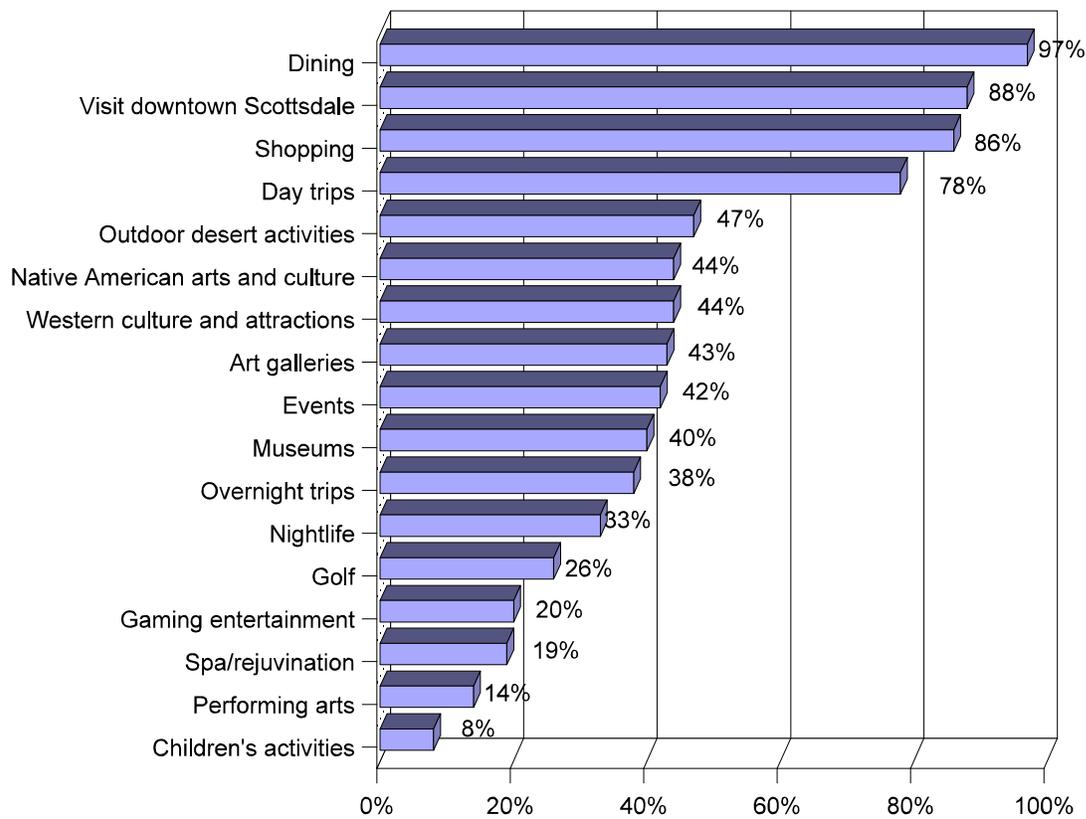
TRAVEL TO OTHER DESTINATIONS (TABLES 12-13)

- Thirty-three percent of all inquirers have visited Las Vegas in the past 12 months, while 22 percent have visited Tucson and 21 percent Orlando or Miami. As in the past, travelers' visitation patterns are tied closely to the region in which they reside.
- The factors most important to inquirers when selecting a destination to visit are the variety of activities available(40%) followed by the weather (36%) and the scenery (25%).

ACTIVITIES PARTICIPATED IN (TABLES 14-16)

- As has been the case in prior years, dining (97%) is the most frequently participated in activity, followed by visits to downtown Scottsdale (88%), shopping (86%) and day trips (78%). These readings are very consistent with last year, however, day trips, overnight trips and downtown visits record large increases.

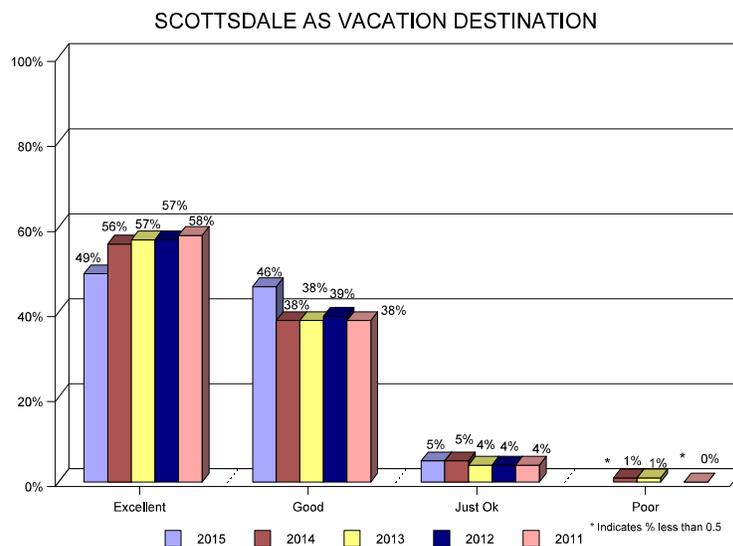
ACTIVITIES PARTICIPATED IN



- Seventy-three percent of visitors who dined while in Scottsdale visited fine dining restaurants, while 69 percent visited fast casual restaurants and 37 percent fast food restaurants.

EVALUATION OF SCOTTSDALE AS A VACATION DESTINATION (TABLES 17-19)

- Over nine out of ten inquirers who have visited Scottsdale (95%) continue to rate it as either an excellent (49%) or good (46%) vacation destination compared to other areas they have visited. In comparison, only five percent rate the city as just okay and less than one percent rate it as poor. The excellent rating of 49 percent is down from 56 to 58 percent over the last several years.
- Nine out of ten visitors (90%) indicate they would be either extremely (68%) or very likely (22%) to recommend Scottsdale to a friend or family member. This pattern is evident across demographic subgroups.
- When visitors are asked to evaluate Scottsdale's transportation options such as cabs, trolleys and buses, 55 percent are not sure. Eighty-three percent of visitors with an opinion offer either an excellent (32%) or good (51%) ratings.



UTILIZATION OF SKY HARBOR AIRPORT (TABLE 20)

- Sixty-eight percent of visitors arrived in the metro area via Sky Harbor Airport and 62 percent of these visitors found it very easy getting to Scottsdale from the airport – down from 71 percent last year.

RECEIPT OF SCOTTSDALE CVB MATERIALS (TABLES 21-24)

- Seven out of ten Scottsdale visitors (70%) indicate they received printed materials from the Scottsdale CVB. This reading has remained relatively stable over the past few years but is down from a high of 80 percent in 2005.
- The materials the CVB distributes continue to be viewed positively by visitors, with 62 percent indicating they were very useful and 32 percent somewhat useful. Six percent of visitors indicate the materials were not useful.

- The most requested additional information from visitors are maps (16%), coupons (8%) and a calendar of events (6%).
- The most relied on websites for travel are Google (27%) and Trip Advisor (17%).

SUMMARY OF FINDINGS

SCOTTSDALE VISITATION PATTERNS

Fifty-eight percent of inquirers have visited Scottsdale since contacting the CVB, while an additional 27 percent indicate they will visit in the next 12 months. This overall visitation reading of 85 percent represents an increase from last year's reading of 80 percent and the first year over year increase since 2012. Also note that the actual visitation reading of 58 percent is up from 46 percent last year.

The data also reveals several other interesting patterns:

- Actual visitation by inquirers who contacted the CVB via the Bureau's website continues to reveal a higher reading (61%) than among those who contacted the CVB via other means (49%).
- Inquirers 35 to 54 (61%) reveal the highest actual visitation readings.
- Actual visitation to Scottsdale increases with increased income. This pattern is consistent with previous findings.
- Inquirers from each of the regions record actual visitation readings which are up from last year: West (54% vs. 48%); Northeast (61% vs. 47%); South (53% vs. 45%); Midwest (64% vs. 46%); foreign (58% vs. 44%).

TABLE 1: SCOTTSDALE VISITATION PATTERNS

“To begin, have you visited Scottsdale since requesting information?”

(IF NO) “Do you plan on visiting Scottsdale during the next 12 months?”

| | HAVE VISITED | WILL VISIT | TOTAL |
|---------------------|--------------|------------|-------|
| <u>TOTAL</u> - 2015 | 58% | 27% | 85% |
| - 2014 | 46 | 34 | 80 |
| - 2013 | 66 | 20 | 86 |
| - 2012 | 75 | 19 | 94 |
| - 2011 | 70 | 21 | 91 |

DETAIL: 2015

| <u>CONTACT MODE</u> | | | |
|----------------------|-----|-----|-----|
| Other ¹ | 61% | 26% | 87% |
| Web | 49 | 28 | 77 |
| | | | |
| <u>AGE</u> | | | |
| Under 35 | 58 | 19 | 77 |
| 35 to 54 | 61 | 26 | 87 |
| 55 or over | 57 | 28 | 85 |
| | | | |
| <u>INCOME</u> | | | |
| Under \$70,000 | 39 | 37 | 76 |
| \$70,000 to \$99,999 | 64 | 23 | 87 |
| \$100,000 or over | 67 | 23 | 90 |
| | | | |
| <u>REGION</u> | | | |
| West | 54 | 36 | 90 |
| Midwest | 64 | 21 | 85 |
| Northeast | 61 | 27 | 88 |
| South | 53 | 32 | 85 |
| Foreign | 58 | 17 | 75 |

¹BRC, Call Center, RSL

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Inquirers who had not visited since inquiring, and do not plan to visit, were asked why they did not plan on visiting Scottsdale. Here we find the main reasons are that they simply decided to go elsewhere (41%), had personal reasons (35%) or had not decided yet (21%).

TABLE 2: REASONS FOR NOT PLANNING TO VISIT

(AMONG THOSE WHO HAVE NOT VISITED SINCE MAKING AN INQUIRY AND DO NOT PLAN TO VISIT IN THE NEXT 12 MONTHS)

“Why don’t you plan on visiting Scottsdale in the next 12 months?”

|                                                   | <u>2015</u> | <u>2014</u> |
|---------------------------------------------------|-------------|-------------|
| Decided to go elsewhere                           | 41%         | 50%         |
| Other country                                     | 6           | 10          |
| North Carolina                                    | 3           | 0           |
| Nevada                                            | 3           | 4           |
| Hawaii                                            | 2           | 1           |
| South Carolina                                    | 2           | 1           |
| Florida                                           | 2           | 6           |
| California                                        | 2           | 5           |
| Other Arizona                                     | 2           | 2           |
| Washington                                        | 1           | 4           |
| Texas                                             | 1           | 2           |
| Pennsylvania                                      | 1           | 2           |
| New York                                          | 1           | 2           |
| Other states with 1 or less mentions              | 15          | 13          |
| Personal reasons – no time, illness               | 35          | 22          |
| Haven’t made a decision yet on where to go        | 21          | 11          |
| Cannot afford – financial problems                | 8           | 13          |
| Because of 1070/racist                            | 4           | 0           |
| Too far                                           | 2           | 0           |
| Just getting relocation info                      | 1           | 1           |
| Too hot/cold                                      | 0           | 2           |
| Been there in the past, want to try something new | 0           | 1           |
| Doesn’t interest me                               | 0           | 1           |
| Not sure                                          | 1           | 2           |
| (Base)                                            | (109)       | (134)       |

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Fifty-five percent of past visitors indicate they will visit Scottsdale again in the next year which is in line with prior years. Visitors 35 and over and those from the West reveal the greatest propensity to visit again.

TABLE 3: REVISITS TO SCOTTSDALE

(AMONG THOSE WHO HAVE VISITED
SINCE MAKING AN INQUIRY)

"Do you plan on visiting Scottsdale again in the next 12 months?"

| | % YES |
|---------------------|-------|
| <u>TOTAL</u> - 2015 | 55% |
| - 2014 | 54 |
| - 2013 | 54 |
| - 2012 | 56 |
| - 2011 | 55 |

DETAIL: 2015

| | |
|----------------------|-----|
| <u>CONTACT MODE</u> | |
| Other | 50% |
| Web | 56 |
| <u>AGE</u> | |
| Under 35 | 30 |
| 35 to 54 | 54 |
| 55 or over | 56 |
| <u>INCOME</u> | |
| Under \$70,000 | 57 |
| \$70,000 to \$99,999 | 53 |
| \$100,000 or over | 57 |
| <u>REGION</u> | |
| West | 68 |
| Midwest | 60 |
| Northeast | 54 |
| Foreign | 47 |
| South | 46 |

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The study also reveals that 87 percent of all inquirers had visited Scottsdale at least once during the past three years with the average visitor having made 2.8 trips – unchanged from last year.

**TABLE 4: SCOTTSDALE TRIPS  
PAST THREE YEARS**

“How many trips, if any, have you made to Scottsdale in the past three years?”

|                             | TOTAL –<br>ALL INQUIRIES |           |           |          |          | VISITATIONS – 2015 |            |                  |
|-----------------------------|--------------------------|-----------|-----------|----------|----------|--------------------|------------|------------------|
|                             | 2015                     | 2014      | 2013      | 2012     | 2011     | Have Visited       | Will Visit | No Plan to Visit |
| One                         | 31%                      | 36%       | 23%       | 16%      | 24%      | 14%                | 50%        | 59%              |
| Two                         | 27                       | 27        | 34        | 35       | 39       | 45                 | 17         | 14               |
| Three                       | 11                       | 12        | 14        | 18       | 15       | 15                 | 10         | 4                |
| Four or more                | 18                       | 14        | 19        | 26       | 17       | 26                 | 10         | 3                |
| None                        | <u>13</u>                | <u>11</u> | <u>10</u> | <u>5</u> | <u>5</u> | <u>0</u>           | <u>13</u>  | <u>20</u>        |
|                             | 100%                     | 100%      | 100%      | 100%     | 100%     | 100%               | 100%       | 100%             |
| MEAN (among those visiting) | 2.8                      | 2.8       | 2.6       | 3.1      | 2.7      | 2.8                | 2.0        | 1.2              |

## **INQUIRER DEMOGRAPHICS**

The socio-demographic characteristics of Scottsdale inquirers are detailed below.

### GENDER

Females account for 59 percent of inquirers – little changed over the last five years.

### AGE

The typical inquirer was 61.1 years old, with 71 percent of all inquirers being 55 years old or older – the first time since the start of these studies that the median age of inquirers has exceeded 60 years. The median age of inquirers has increased from 56.1 to 61.1 over the past five years.

### INCOME

Scottsdale inquirers continue to be an affluent group with a median household income of \$92,000. This figure is down from \$103,900 in 2013 and \$97,400 in 2014. Individuals who have visited the city continue to reveal the highest median incomes of \$98,400 – down from \$115,700 last year.

### REGION

Twenty-seven percent of inquirers come from the Midwest, 24 percent from the West, 13 percent from the Northeast, 13 percent from the South and 23 percent are foreign.

**TABLE 5: INQUIRER DEMOGRAPHICS**

|                        | <u>TOTAL – ALL INQUIRERS</u> |           |           |           |           | <u>VISITATION – 2015</u> |            |                  |
|------------------------|------------------------------|-----------|-----------|-----------|-----------|--------------------------|------------|------------------|
|                        | 2015                         | 2014      | 2013      | 2012      | 2011      | Have Visited             | Will Visit | No Plan To Visit |
| <u>GENDER</u>          |                              |           |           |           |           |                          |            |                  |
| Male                   | 41%                          | 42%       | 43%       | 41%       | 40%       | 39%                      | 47%        | 34%              |
| Female                 | <u>59</u>                    | <u>58</u> | <u>57</u> | <u>59</u> | <u>60</u> | <u>61</u>                | <u>53</u>  | <u>65</u>        |
|                        | 100%                         | 100%      | 100%      | 100%      | 100%      | 100%                     | 100%       | 100%             |
| <u>AGE</u>             |                              |           |           |           |           |                          |            |                  |
| Under 25               | 1%                           | 1%        | *%        | 1%        | 1%        | 1%                       | 1%         | 1%               |
| 25 to 34               | 3                            | 4         | 4         | 4         | 4         | 3                        | 1          | 4                |
| 35 to 44               | 8                            | 11        | 12        | 10        | 13        | 9                        | 5          | 14               |
| 45 to 54               | 17                           | 21        | 24        | 24        | 28        | 18                       | 20         | 8                |
| 55 to 64               | 35                           | 33        | 35        | 33        | 35        | 35                       | 36         | 32               |
| 65 or over             | <u>36</u>                    | <u>30</u> | <u>25</u> | <u>28</u> | <u>19</u> | <u>34</u>                | <u>37</u>  | <u>41</u>        |
|                        | 100%                         | 100%      | 100%      | 100%      | 100%      | 100%                     | 100%       | 100%             |
| MEDIAN AGE             | 61.1                         | 59.1      | 57.7      | 58.3      | 56.1      | 60.4                     | 61.6       | 62.0             |
| <u>INCOME</u>          |                              |           |           |           |           |                          |            |                  |
| Under \$40,000         | 11%                          | 8%        | 5%        | 6%        | 6%        | 7%                       | 19%        | 12%              |
| \$40,000 to \$54,999   | 10                           | 8         | 6         | 10        | 8         | 6                        | 12         | 21               |
| \$55,000 to \$69,999   | 9                            | 15        | 10        | 12        | 10        | 7                        | 9          | 15               |
| \$70,000 to \$84,999   | 13                           | 10        | 14        | 13        | 14        | 13                       | 13         | 12               |
| \$85,000 to \$99,999   | 15                           | 11        | 12        | 12        | 10        | 18                       | 11         | 10               |
| \$100,000 to \$149,999 | 23                           | 23        | 29        | 25        | 25        | 25                       | 20         | 20               |
| \$150,000 to \$199,999 | 10                           | 12        | 13        | 12        | 13        | 14                       | 7          | 6                |
| \$200,000 or over      | <u>9</u>                     | <u>13</u> | <u>11</u> | <u>10</u> | <u>14</u> | <u>10</u>                | <u>9</u>   | <u>4</u>         |
|                        | 100%                         | 100%      | 100%      | 100%      | 100%      | 100%                     | 100%       | 100%             |
| MEDIAN INCOME (000)    | \$92.0                       | \$97.4    | \$103.9   | \$96.3    | \$103.2   | \$98.4                   | \$81.4     | \$72.3           |
| <u>REGION</u>          |                              |           |           |           |           |                          |            |                  |
| Midwest                | 27%                          | 22%       | 26%       | 32%       | 29%       | 30%                      | 21%        | 26%              |
| West                   | 24                           | 28        | 23        | 30        | 29        | 22                       | 32         | 16               |
| Foreign                | 23                           | 20        | 15        | NA        | NA        | 22                       | 17         | 34               |
| Northeast              | 13                           | 16        | 17        | 20        | 22        | 14                       | 14         | 11               |
| South                  | <u>13</u>                    | <u>14</u> | <u>19</u> | <u>18</u> | <u>20</u> | <u>12</u>                | <u>16</u>  | <u>13</u>        |
|                        | 100%                         | 100%      | 100%      | 100%      | 100%      | 100%                     | 100%       | 100%             |

\*Indicates % less than .5

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## TRIP CHARACTERISTICS

The trip characteristics of inquirers who visited Scottsdale since their contact with the CVB or plan to visit in the next 12 months are described on the next several pages.

### LENGTH OF VISIT

The typical visitor to Scottsdale spent 5.4 nights, with 58 percent staying five nights or more. Each of these readings is unchanged from last year.

TABLE 6: LENGTH OF VISIT

(AMONG VISITORS)

“How many nights, in total, did you spend in Scottsdale on your trip?”

|            | 2015      | 2014      | 2013      | 2012      | 2011      |
|------------|-----------|-----------|-----------|-----------|-----------|
| Day trip   | 12%       | 7%        | 5%        | 10%       | 7%        |
| 1 to 2     | 7         | 11        | 8         | 8         | 4         |
| 3 to 4     | 23        | 24        | 26        | 22        | 20        |
| 5 to 7     | 35        | 38        | 41        | 41        | 48        |
| 8 or over  | <u>23</u> | <u>20</u> | <u>20</u> | <u>19</u> | <u>21</u> |
|            | 100%      | 100%      | 100%      | 100%      | 100%      |
| <br>MEDIAN | 5.4       | 5.4       | 5.8       | 5.9       | 6.3       |

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MODES OF TRANSPORTATION

The majority of visitors (59%) continue to use a rental vehicle to get around during their visit while 32 percent use their personal vehicle.

TABLE 7: MODES OF TRANSPORTATION

(AMONG VISITORS)

“Which of the following modes of transportation did you use to get around during your visit to Scottsdale?”

| | <u>2015</u> | <u>2014</u> |
|------------------------------|-------------|-------------|
| A rental vehicle | 59% | 63% |
| Your personal vehicle | 32 | 26 |
| A family or friend’s vehicle | 8 | 7 |
| A trolley | 7 | 6 |
| Cabs | 7 | 6 |
| Buses | <u>4</u> | <u>5</u> |
| | 117%* | 113%* |

*Total exceeds 100% due to multiple responses

~~~~~

TIMING OF VISIT

Similar to prior years, six out of ten inquirers (60%) who visited Scottsdale did so either during the January to March period (38%) or the April to June period (22%). This combined January to June figure is little changed from 61 percent last year. Forty-one percent of inquirers who plan to visit Scottsdale plan to do so by the end of 2015.

TABLE 8: DATE OF SCOTTSDALE VISITATION

“During which month and year (did you/will you) visit Scottsdale?”

(AMONG THOSE WHO HAVE VISITED)

MONTH/YEAR OF INQUIRY

| <u>MONTH/YEAR OF VISIT</u> | <u>TOTAL</u> | <u>Apr -<br/>June '14</u> | <u>July -<br/>Sept '14</u> | <u>Oct -<br/>Dec '14</u> | <u>Jan -<br/>Mar '15</u> |
|----------------------------|--------------|---------------------------|----------------------------|--------------------------|--------------------------|
| Apr - Jun '14              | 4%           | 14%                       | 0%                         | 0%                       | 0%                       |
| Jul - Sept '14             | 14           | 28                        | 22                         | 0                        | 0                        |
| Oct - Dec '14              | 16           | 19                        | 27                         | 18                       | 0                        |
| Jan - Mar '15              | 38           | 19                        | 33                         | 52                       | 49                       |
| Apr - Jun '15              | 22           | 17                        | 17                         | 16                       | 41                       |
| Jul - Aug '15              | <u>6</u>     | <u>3</u>                  | <u>1</u>                   | <u>14</u>                | <u>10</u>                |
|                            | 100%         | 100%                      | 100%                       | 100%                     | 100%                     |

(AMONG THOSE WHO PLAN TO VISIT)

MONTH/YEAR OF INQUIRY

| <u>MONTH/YEAR OF<br/>PLANNED VISIT</u> | <u>TOTAL</u> | <u>Apr -<br/>June '14</u> | <u>July -<br/>Sept '14</u> | <u>Oct -<br/>Dec '14</u> | <u>Jan -<br/>Mar '15</u> |
|----------------------------------------|--------------|---------------------------|----------------------------|--------------------------|--------------------------|
| Aug-Sep '15                            | 14%          | 15%                       | 18%                        | 8%                       | 17%                      |
| Oct - Dec '15                          | 27           | 28                        | 37                         | 18                       | 26                       |
| Jan - Mar '16                          | 35           | 30                        | 35                         | 46                       | 29                       |
| Apr - Jun '16                          | 15           | 23                        | 7                          | 14                       | 16                       |
| Jul - Sep '16                          | 4            | 2                         | 0                          | 2                        | 9                        |
| Oct - Dec '16                          | 2            | 0                         | 3                          | 2                        | 1                        |
| 2017                                   | 1            | 2                         | 0                          | 2                        | 0                        |
| Not sure                               | <u>2</u>     | <u>0</u>                  | <u>0</u>                   | <u>8</u>                 | <u>2</u>                 |
|                                        | 100%         | 100%                      | 100%                       | 100%                     | 100%                     |

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TRAVEL PARTY CONFIGURATION

The typical travel party size among inquirers who have visited the city is 2.6 people, with over one-half of all parties (56%) containing two individuals. These patterns reveal a party size which is very similar to the patterns found in each of the previous studies. The data also reveals that 57 percent of travel parties contained individuals between 50 and 64 – up from 49 percent the last two years.

TABLE 9: TRAVEL PARTY CONFIGURATION

(AMONG VISITORS)

"Including yourself, how many people in your traveling party were. . ."

| | 2015 | 2014 | 2013 | 2012 | 2011 |
|--|-----------|-----------|-----------|----------|-----------|
| <u>PARTY SIZE</u> | | | | | |
| 1 | 12% | 14% | 12% | 11% | 8% |
| 2 | 56 | 47 | 54 | 52 | 53 |
| 3 to 4 | 20 | 28 | 21 | 28 | 27 |
| 5 or more | <u>12</u> | <u>11</u> | <u>13</u> | <u>9</u> | <u>12</u> |
| | 100% | 100% | 100% | 100% | 100% |
| MEAN | 2.6 | 2.8 | 2.7 | 2.9 | 3.0 |
| | | | | | |
| <u>% OF PARTIES CONTAINING PERSONS OF FOLLOWING AGES</u> | | | | | |
| 5 or younger | 6% | 13% | 17% | 10% | 9% |
| 6 to 17 | 10 | 15 | 10 | 14 | 11 |
| 18 to 34 | 12 | 15 | 13 | 13 | 12 |
| 35 to 49 | 20 | 28 | 24 | 24 | 28 |
| 50 to 64 | 57 | 49 | 49 | 58 | 50 |
| 65 or over | 38 | 26 | 26 | 30 | 20 |
| ~~~~~ | | | | | |

ACCOMMODATIONS

Fifty-seven percent of Scottsdale visitors stay at either a full-service hotel (24%), a luxury resort (21%) or a limited-service hotel or motel (12%). This overall hotel reading is down from last year's unusually high reading of 67 percent (the highest since 2007). Also note that the luxury resort reading (21%) is down from its normal range of 28 to 32 percent.

TABLE 10: ACCOMMODATIONS

(AMONG VISITORS)

"During your visit to Scottsdale, did you stay in a..."

| | 2015 | 2014 | 2013 | 2012 | 2011 |
|--------------------------------|------|------|------|------|------|
| Full-service hotel | 24% | 24% | 20% | 21% | 19% |
| Luxury resort | 21 | 34 | 29 | 28 | 31 |
| Rental home, apartment, condo | 16 | 11 | 10 | 10 | 12 |
| Timeshare | 14 | 10 | 15 | 18 | 17 |
| Limited-service hotel or motel | 12 | 7 | 7 | 9 | 9 |
| Private home as a guest | 8 | 11 | 13 | 9 | 10 |
| Second home | 5 | 3 | 2 | 2 | 2 |
| Other | 0 | * | 4 | 3 | * |
| | 100% | 100% | 100% | 100% | 100% |

*Indicates % less than .5

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TRIP SPENDING PATTERNS

The typical overnight Scottsdale visitor party spent \$353 per day while in Scottsdale, which is down from last year's figure of \$400 but in line with 2013's reading of \$359. Also notable is that 23 percent of visitors spent under \$100 per party per day while 38 percent of all overnight visitors spent \$500 or more per party per day. Average daily spending by day trippers was \$155, down from \$185 last year.

TABLE 11: TRIP SPENDING PATTERNS

(AMONG OVERNIGHT VISITORS)

"Now I'd like to get some idea of your spending patterns while you were in Scottsdale. Thinking about a typical day during your visit, on average, how much did you and your travel party spend each day on the following items? When responding, please include the combined spending for all members of your travel party."

|                |           |
|----------------|-----------|
| Under \$100    | 23%       |
| \$100 to \$199 | 11        |
| \$200 to \$299 | 11        |
| \$300 to \$399 | 10        |
| \$400 to \$499 | 7         |
| \$500 to \$749 | 14        |
| \$750 or over  | <u>24</u> |
|                | 100%      |

MEDIAN DAILY SPENDING PER PARTY/PER DAY

|        |       |
|--------|-------|
| - 2015 | \$353 |
| - 2014 | 400   |
| - 2013 | 359   |
| - 2012 | 400   |
| - 2011 | 355   |

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TRAVEL TO OTHER DESTINATIONS

Thirty-three percent of all inquirers have visited Las Vegas in the past 12 months, while 22 percent have visited Tucson and 21 percent Orlando or Miami. As in the past, travelers' visitation patterns are tied closely to the region in which they reside.

**TABLE 12: TRAVEL TO SPECIFIC
DESTINATIONS – PAST 12 MONTHS**

(AMONG ALL INQUIRERS)

"Next, have you made pleasure or vacation trips to any of the following travel destinations in the past 12 months?"

| | TOTAL | | | | | REGION – 2015 | | | |
|--------------------|-------|------|------|------|------|---------------|----------|-------|------------|
| | 2015 | 2014 | 2013 | 2012 | 2011 | West | Mid-west | South | North-east |
| Las Vegas | 33% | 34% | 30% | NA | NA | 51% | 22% | 23% | 18% |
| Tucson | 22 | 17 | 17 | NA | NA | 29 | 17 | 16 | 15 |
| Orlando/Miami | 21 | NA | NA | NA | NA | 12 | 19 | 33 | 29 |
| Los Angeles | 18 | 22 | 19 | NA | NA | 34 | 10 | 8 | 5 |
| Taken a cruise | 18 | 19 | 15 | 14 | 14 | 21 | 16 | 19 | 17 |
| San Diego | 17 | 19 | 17 | 20 | 16 | 35 | 9 | 14 | 10 |
| Colorado | 17 | 17 | 12 | 18 | NA | 24 | 15 | 19 | 9 |
| Mexico | 15 | 16 | 12 | 14 | 12 | 17 | 14 | 9 | 14 |
| Hawaii | 13 | 15 | 13 | 13 | 9 | 24 | 10 | 8 | 10 |
| Palm Springs | 12 | 16 | 16 | 14 | 13 | 24 | 4 | 3 | 11 |
| Austin/San Antonio | 9 | NA | NA | NA | NA | 10 | 4 | 20 | 9 |

NA = Not Asked

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When inquirers are asked to indicate the factors most important to them in selecting a destination to visit, the variety of activities available leads the list (40%) followed by the weather (36%) and the scenery (25%).

TABLE 13: MOST IMPORTANT FACTORS  
WHEN SELECTING TRAVEL DESTINATION

“Next, what are the one or two factors that are most important to you when selecting a destination to visit?”

|                                                      |     |
|------------------------------------------------------|-----|
| Variety of activities/entertainment/<br>things to do | 40% |
| Weather                                              | 36  |
| Scenery/sights/natural beauty                        | 25  |
| Cost/affordability                                   | 18  |
| Accommodations                                       | 13  |
| Cultural opportunities                               | 10  |
| Variety of restaurants                               | 9   |
| Safety/environment                                   | 8   |
| Ease of getting around area/<br>transportation       | 7   |
| Ease of travel getting there                         | 6   |
| Family/friends live there                            | 5   |
| Never been there – new                               | 4   |
| Shopping opportunities                               | 3   |

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ACTIVITIES PARTICIPATED IN

Overnight Scottsdale visitors were asked to indicate if they participated in each of 17 specific activities during their visit. As has been the case in prior years, dining (97%) is the most frequently participated in activity, followed by visits to downtown Scottsdale (88%), shopping (86%) and day trips (78%). These readings are very consistent with last year, however, day trips, overnight trips and downtown visits recorded large increases.

TABLE 14: ACTIVITIES PARTICIPATED IN

(AMONG OVERNIGHT VISITORS)

"During your most recent visit to Scottsdale, did you participate in any of the following activities?"

| | 2015 | 2014 | 2013 | 2012 | 2011 |
|---|------|------|------|------|------|
| Dining | 97% | 93% | 96% | 95% | 95% |
| Visit downtown Scottsdale | 88 | 80 | 84 | 83 | NA |
| Shopping | 86 | 85 | 86 | 87 | 89 |
| Day trips to other locations in Arizona | 78 | 68 | 70 | 71 | 66 |
| Outdoor desert activities | 47 | 46 | 43 | 38 | 38 |
| Native American arts and culture | 44 | 40 | 42 | 42 | 43 |
| Western culture and attractions | 44 | 38 | 47 | 46 | 44 |
| Art galleries | 43 | 40 | 41 | 38 | 39 |
| Events | 42 | 32 | 35 | 14 | NA |
| Museums | 40 | 38 | 39 | 38 | 41 |
| Overnight trips to other locations in Arizona | 38 | 27 | 26 | 30 | 30 |
| Nightlife | 33 | 33 | 30 | 31 | 36 |
| Golf | 26 | 20 | 21 | 23 | 29 |
| Gaming entertainment | 20 | 16 | 19 | 22 | NA |
| Spa/rejuvenation | 19 | 24 | 18 | 23 | 26 |
| Performing arts | 14 | 10 | 14 | 15 | 14 |
| Children's activities | 8 | 14 | 11 | 14 | 10 |

NA = Not Asked

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On the following table it may be seen that participation differs greatly by visitor demographics.

**TABLE 15: ACTIVITIES PARTICIPATED IN – DETAIL**

|                                 | TOTAL | GENDER |        | AGE      |          |            | INCOME      |                  |                |
|---------------------------------|-------|--------|--------|----------|----------|------------|-------------|------------------|----------------|
|                                 |       | Male   | Female | Under 35 | 35 to 54 | 55 or Over | Under \$70K | \$70K to \$99.9K | \$100K or Over |
| Dining                          | 97%   | 98%    | 97%    | 81%      | 87%      | 98%        | 95%         | 97%              | 98%            |
| Visit downtown Scottsdale       | 88    | 85     | 90     | 83       | 90       | 89         | 86          | 89               | 90             |
| Shopping                        | 86    | 90     | 83     | 72       | 85       | 88         | 81          | 85               | 90             |
| Day trips                       | 78    | 84     | 74     | 66       | 73       | 80         | 73          | 82               | 80             |
| Outdoor desert activities       | 47    | 52     | 44     | 65       | 62       | 41         | 28          | 50               | 60             |
| Native American arts/culture    | 44    | 42     | 45     | 40       | 38       | 48         | 36          | 48               | 46             |
| Western culture and attractions | 44    | 42     | 45     | 31       | 39       | 47         | 36          | 39               | 46             |
| Art galleries                   | 43    | 37     | 48     | 31       | 33       | 49         | 37          | 43               | 49             |
| Events                          | 42    | 43     | 42     | 35       | 46       | 40         | 55          | 45               | 34             |
| Museums                         | 40    | 38     | 41     | 40       | 30       | 45         | 32          | 41               | 40             |
| Overnight trips                 | 38    | 36     | 39     | 53       | 35       | 38         | 32          | 35               | 43             |
| Nightlife                       | 33    | 38     | 30     | 45       | 33       | 32         | 33          | 32               | 36             |
| Golf                            | 26    | 31     | 21     | 7        | 26       | 27         | 19          | 20               | 30             |
| Gaming entertainment            | 20    | 19     | 21     | 7        | 23       | 19         | 21          | 17               | 21             |
| Spa/rejuvenation                | 19    | 10     | 25     | 0        | 25       | 18         | 19          | 7                | 26             |
| Performing arts                 | 14    | 12     | 16     | 15       | 7        | 17         | 20          | 15               | 13             |
| Children's activities           | 8     | 7      | 9      | 8        | 14       | 6          | 10          | 3                | 13             |

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A new question was added this year on the types of restaurants visitors frequented during their stay. Here we find that 73 percent visited fine dining restaurants, while 69 percent visited fast casual restaurants and 37 percent fast food restaurants.

TABLE 16: TYPE OF RESTAURANTS VISITED

(AMONG OVERNIGHT VISITORS DINING)

“Did you visit the following type of restaurants when you were in Scottsdale?”

| | <u>% YES</u> | | |
|----------------------|--------------------|--------------------|------------------|
| | <u>Fine Dining</u> | <u>Fast Casual</u> | <u>Fast Food</u> |
| <u>TOTAL</u> | 73% | 69% | 37% |
| <u>GENDER</u> | | | |
| Male | 73 | 73 | 37 |
| Female | 73 | 67 | 37 |
| <u>AGE</u> | | | |
| Under 35 | 71 | 57 | 24 |
| 35 to 54 | 75 | 72 | 42 |
| 55 or over | 72 | 69 | 35 |
| <u>INCOME</u> | | | |
| Under \$70,000 | 59 | 66 | 42 |
| \$70,000 to \$99,999 | 72 | 69 | 48 |
| \$100,000 or over | 80 | 67 | 29 |

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**EVALUATION OF SCOTTSDALE AS A VACATION DESTINATION**

Over nine out of ten inquirers who have visited Scottsdale (95%) continue to rate it as either an excellent (49%) or good (46%) vacation destination compared to other areas they have visited. In comparison, only five percent rate the city as just okay and one percent rate it as poor. The excellent rating of 49 percent is down from 56 to 58 percent over the last several years. Also note that visitors under 35 offer the highest poor reading (10%).

The main reasons that visitors offer only a just okay or poor rating are: overpriced (5 responses), limited tourist attractions/activities (3), hard to get around (3), weather (2), traffic (2), too crowded (2) and lack of big city feel (2). No other comments received more than one response.

**TABLE 17: SCOTTSDALE COMPARED TO  
OTHER AREAS VISITED**

(AMONG VISITORS)

“Next, overall how would you rate Scottsdale as a vacation destination compared to other areas you visit – excellent, good, just ok or poor?”

|                     | Excel-<br>lent | Good | Just<br>Ok | Poor |
|---------------------|----------------|------|------------|------|
| <u>TOTAL</u> - 2015 | 49%            | 46%  | 5%         | *%   |
| - 2014              | 56             | 38   | 5          | 1    |
| - 2013              | 57             | 38   | 4          | 1    |
| - 2012              | 57             | 39   | 4          | *    |
| - 2011              | 58             | 38   | 4          | 0    |

DETAIL: 2015

| <u>GENDER</u>        |     |     |    |    |
|----------------------|-----|-----|----|----|
| Male                 | 46% | 48% | 6% | 0% |
| Female               | 49  | 46  | 5  | *  |
| <u>AGE</u>           |     |     |    |    |
| Under 35             | 39  | 51  | 10 | 0  |
| 35 to 54             | 53  | 40  | 6  | 1  |
| 55 or over           | 48  | 47  | 5  | 0  |
| <u>INCOME</u>        |     |     |    |    |
| Under \$70,000       | 55  | 43  | 2  | 0  |
| \$70,000 to \$99,999 | 52  | 42  | 5  | 1  |
| \$100,000 or over    | 47  | 47  | 6  | 0  |

\*Indicates % less than .5.

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When visitors are asked the likelihood they would recommend Scottsdale to a friend or family member, nine out of ten (90%) indicate they would be either extremely (68%) or very likely (22%) to do so. This pattern is evident across demographic subgroups.

**TABLE 18: LIKELIHOOD OF RECOMMENDING
SCOTTSDALE TO FRIEND/FAMILY**

(AMONG VISITORS)

“On a scale of 1 to 10 where 1 means not at all likely and 10 means extremely likely, how likely would you be to recommend Scottsdale to a friend or family member?”

| | Not Likely (1-4) | Somewhat Likely (5-6) | Very Likely (7-8) | Extremely Likely (9-10) | TOTAL VERY/ EXTREMELY LIKELY |
|----------------------|------------------------|-----------------------------|-------------------------|-------------------------------|---------------------------------------|
| <u>TOTAL</u> | 3% | 7% | 22% | 68% | 90% |
| <u>GENDER</u> | | | | | |
| Male | 3 | 7 | 20 | 70 | 90 |
| Female | 2 | 6 | 24 | 68 | 92 |
| <u>AGE</u> | | | | | |
| Under 35 | 10 | 0 | 57 | 33 | 90 |
| 35 to 54 | 3 | 9 | 19 | 69 | 88 |
| 55 or over | 2 | 6 | 22 | 70 | 92 |
| <u>INCOME</u> | | | | | |
| Under \$70,000 | 0 | 5 | 23 | 72 | 95 |
| \$70,000 to \$99,999 | 5 | 5 | 18 | 72 | 90 |
| \$100,000 or over | 2 | 4 | 23 | 71 | 94 |

In a related question, when visitors are asked to evaluate Scottsdale's transportation options such as cabs, trolleys and buses, 55 percent are not sure. Eighty-three percent of visitors with an opinion offer either an excellent (32%) or good (51%) rating – virtually unchanged from the last two years.

TABLE 19: EVALUATION OF
SCOTTSDALE TRANSPORTATION OPTIONS

(AMONG VISITORS)

“Overall, would you rate the transportation options such as cabs, trolleys and buses available in Scottsdale as excellent, good, just ok or poor?”

| | <u>All Visitors</u> | | | <u>Visitors With Opinion</u> | | |
|-----------|---------------------|-------------|-------------|------------------------------|-------------|-------------|
| | <u>2015</u> | <u>2014</u> | <u>2013</u> | <u>2015</u> | <u>2014</u> | <u>2013</u> |
| Excellent | 15% | 17% | 15% | 32% | 38% | 37% |
| Good | 23 | 20 | 17 | 51 | 44 | 44 |
| Just ok | 6 | 6 | 6 | 14 | 14 | 14 |
| Poor | 1 | 2 | 2 | 3 | 4 | 5 |
| Not sure | <u>55</u> | <u>55</u> | <u>60</u> | <u>NA</u> | <u>NA</u> | <u>NA</u> |
| | 100% | 100% | 100% | 100% | 100% | 100% |

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**UTILIZATION OF SKY HARBOR AIRPORT**

Sixty-eight percent of visitors arrived in the metro area via Sky Harbor Airport and 62 percent of these visitors found it very easy getting to Scottsdale from the airport – down from 71 percent last year. Eight visitors found it difficult and they felt airport-provided maps (3 responses), less construction/better airport exit signage (2), shuttles to rental car facility (2) and better drivers (1) would have reduced the difficulty.

TABLE 20: ARRIVAL VIA SKY HARBOR

(AMONG VISITORS)

“During your most recent visit to Scottsdale, did you arrive in the metro area via Sky Harbor International Airport in Phoenix?”

|     | <u>2015</u> | <u>2014</u> |
|-----|-------------|-------------|
| Yes | 68%         | 69%         |
| No  | <u>32</u>   | <u>31</u>   |
|     | 100%        | 100%        |

(IF YES)

“Did you find it very easy, fairly easy or difficult getting to Scottsdale from the airport?”

|             |          |          |
|-------------|----------|----------|
| Very easy   | 62%      | 71%      |
| Fairly easy | 35       | 28       |
| Difficult   | <u>3</u> | <u>1</u> |
|             | 100%     | 100%     |

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RECEIPT OF SCOTTSDALE CVB MATERIALS

Seven out of ten Scottsdale visitors (70%) continue to indicate they received printed materials from the Scottsdale CVB. This reading has remained relatively stable over the past few years but is down from a high of 80 percent in 2005.

TABLE 21: RECEIPT OF PRINTED MATERIAL

(AMONG VISITORS)

“When planning your trip to Scottsdale, did you receive printed materials from the Scottsdale Convention and Visitors Bureau?”

| | <u>% YES</u> | | | | |
|----------------------|--------------|-------------|-------------|-------------|-------------|
| | <u>2015</u> | <u>2014</u> | <u>2013</u> | <u>2012</u> | <u>2011</u> |
| <u>TOTAL</u> | 70% | 67% | 65% | 68% | 64% |
| <u>GENDER</u> | | | | | |
| Male | 66 | 66 | 69 | 70 | 60 |
| Female | 72 | 67 | 63 | 67 | 68 |
| <u>AGE</u> | | | | | |
| Under 35 | 100 | 41 | 48 | 57 | 71 |
| 35 to 54 | 72 | 69 | 61 | 69 | 63 |
| 55 or over | 69 | 68 | 69 | 69 | 65 |
| <u>INCOME</u> | | | | | |
| Under \$70,000 | 82 | 30 | 63 | 68 | 63 |
| \$70,000 to \$99,999 | 67 | 63 | 67 | 73 | 73 |
| \$100,000 or over | 63 | 66 | 58 | 67 | 62 |

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The materials the CVB distributes continue to be viewed positively by visitors, with 62 percent indicating they were very useful and 32 percent somewhat useful. Six percent of visitors indicate the materials were not useful – up slightly from two percent the last few years.

**TABLE 22: USEFULNESS OF CVB MATERIALS**

(AMONG THOSE RECEIVING MATERIALS)

“Did you find the material you received from the Scottsdale Convention and Visitors Bureau very useful, somewhat useful or not very useful?”

|                     | Very Useful | Somewhat Useful | Not Very Useful |
|---------------------|-------------|-----------------|-----------------|
| <u>TOTAL</u> - 2015 | 62%         | 32%             | 6%              |
| - 2014              | 62          | 36              | 2               |
| - 2013              | 61          | 37              | 2               |
| - 2012              | 64          | 34              | 2               |
| - 2011              | 55          | 41              | 4               |

DETAIL: 2015

| <u>GENDER</u>        |     |     |    |
|----------------------|-----|-----|----|
| Male                 | 61% | 31% | 8% |
| Female               | 63  | 31  | 6  |
| <u>AGE</u>           |     |     |    |
| Under 35             | 50  | 50  | 0  |
| 35 to 54             | 67  | 28  | 5  |
| 55 or over           | 61  | 32  | 7  |
| <u>INCOME</u>        |     |     |    |
| Under \$70,000       | 76  | 20  | 4  |
| \$70,000 to \$99,999 | 61  | 30  | 9  |
| \$100,000 or over    | 68  | 28  | 4  |

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The most requested additional information from visitors are maps (16%), coupons (8%) and a calendar of events (6%).

TABLE 23: OTHER INFORMATION DESIRED

(AMONG THOSE RECEIVING MATERIALS)

“What additional information could the Scottsdale Convention and Visitor’s Bureau have provided to you to aid in making your travel decision?”

| | |
|---|-----|
| None | 53% |
| Maps (NET) | 16 |
| Current – up to date | 11 |
| Map that shows attractions | 6 |
| Coupons (NET) | 8 |
| Restaurant | 3 |
| Event | 3 |
| Hotel | 1 |
| Transportation – airport to hotel | 1 |
| Calendar of events/activities | 6 |
| Transportation Info (NET) | 4 |
| Disabled | 1 |
| Airport hotel shuttles | 1 |
| Direction to/from airport, freeways | 1 |
| Heavy traffic times | 1 |
| List of hiking, biking locations | 4 |
| Get travel information to us sooner | 3 |
| Restaurant listings | 3 |
| Golf courses listings | 2 |
| Hotel listings | 2 |
| Short term real estate rental information | 2 |
| Weather information | 1 |
| Spring training | 1 |

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The most relied on websites for travel are Google (27%) and Trip Advisor (17%).

**TABLE 24: INFORMATION SOURCES UTILIZED  
PRIOR TO SELECTING DESTINATION**

(AMONG THOSE RECEIVING MATERIALS)

“What specific information sources such as websites or publications do you utilize to obtain information prior to selecting a travel destination?”

|                       |     |
|-----------------------|-----|
| Websites (NET)        | 66% |
| Google/Google reviews | 27  |
| Trip Advisor          | 17  |
| City of Scottsdale    | 7   |
| City websites         | 7   |
| CVB websites          | 6   |
| Expedia               | 6   |
| State websites        | 6   |
| Hotel websites        | 5   |
| Chamber of Commerce   | 2   |
| Travelocity           | 2   |
| Arizona Republic      | 3   |
| Kayak                 | 2   |
| Miscellaneous other   | 7   |
| Magazines             | 10  |
| Word of mouth         | 9   |
| Newspaper             | 2   |
| None                  | 9   |
| Don't recall          | 8   |

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APPENDIX

SURVEY QUESTIONNAIRE

Hello, may I speak to (SPECIFIC PERSON LISTED) please?

(WHEN PERSON ON LINE, CONTINUE — IF NOT AVAILABLE, ARRANGE CALLBACK)

Hello (PERSON'S NAME) my name is _____ and I'm calling on behalf of the Scottsdale, Arizona Convention and Visitor's Bureau. Sometime back you contacted the Scottsdale Convention and Visitor's Bureau for information on our area or filled out a form requesting information on our area and I'd like to talk with you for just a few moments.

1. To begin, have you visited Scottsdale since requesting information? (GO TO Q2) Yes...1
(GO TO Q1a) No...2
- 1a. Do you plan on visiting Scottsdale during the next 12 months? (GO TO Q2) Yes...1
(GO TO Q1b) No...2
- 1b. Why don't you plan on visiting Scottsdale in the next 12 months?

- 1c. (IF SAYS, "DECIDED TO GO ELSEWHERE", ASK): Where do you plan on going?

(GO TO Q18)

2. During which month and year (did you/will you) visit Scottsdale? Month / / /
Year / / / / /

IF VISITED SCOTTSDALE (Q1=1) GO TO Q3; OTHERWISE GO TO Q14

3. How many nights, in total, did you spend in Scottsdale on your trip? NIGHTS: / / / /
(CODE 998 IF DAY TRIP) (CODE 999 IF REFUSED)

IF Q3 = 998 GO TO Q5; OTHERWISE GO TO Q4

4. During your visit to Scottsdale did you stay in a... (READ EACH)
- A luxury resort...1
 - A full-service hotel...2
 - A limited-service hotel or motel...3
 - A timeshare...4
 - A private home as a guest...5
 - A home that you own...6
 - Or a rental home, apt or condo...7
 - (DO NOT READ) _____ Other (SPECIFY)
 - Not sure...9

5. Including yourself, how many people in your traveling party were... (READ EACH)
- 5 or younger: _____
 - 6 to 17: _____
 - 18 to 34: _____
 - 35 to 49: _____
 - 50 to 64: _____
 - 65 or over: _____
 - (DO NOT READ) TOTAL: _____

6. Which of the following modes of transportation did you use to get around during your visit to Scottsdale? (READ EACH – MARK ALL MENTIONED)
- Your personal vehicle...1
 A rental vehicle...2
 A trolley...3
 Cabs...4
 Buses...5
 A family or friend's vehicle..6
7. Overall, would you rate the transportation options such as cabs, trolleys and buses available in Scottsdale as excellent, good, just ok or poor?
- Excellent...1
 Good...2
 Just ok...3
 Poor...4
 Not sure...5
8. During your most recent visit to Scottsdale did you arrive in the metro area via Sky Harbor International Airport in Phoenix?
- (GO TO Q8a) Yes...1
 (GO TO Q9) No...2
- 8a. Did you find it very easy, fairly easy or difficult getting to Scottsdale from the airport?
- (GO TO Q9) Very easy...1
 (GO TO Q8b) Fairly easy...2
 (GO TO Q8b) Difficult...3
- 8b. What do you feel could be done to reduce the difficulty?
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9. During your most recent visit to Scottsdale, did you participate in any of the following activities? (ROTATE ALL EXCEPT Q)

| | Yes | No | Not Sure |
|--|-----|----|----------|
| A. Golf | 1 | 2 | 3 |
| B. Spa/rejuvenation | 1 | 2 | 3 |
| C. Art galleries | 1 | 2 | 3 |
| D. Museums | 1 | 2 | 3 |
| E. Performing arts | 1 | 2 | 3 |
| F. Native American arts and culture | 1 | 2 | 3 |
| G. Western culture and attractions | 1 | 2 | 3 |
| H. Gaming entertainment | 1 | 2 | 3 |
| I. Outdoor desert activities such as horseback riding and hiking | 1 | 2 | 3 |
| J. Shopping | 1 | 2 | 3 |
| K. Events | 1 | 2 | 3 |
| L. Nightlife | 1 | 2 | 3 |
| M. Children's activities | 1 | 2 | 3 |
| N. Visit downtown Scottsdale also known as Old Town | 1 | 2 | 3 |
| O. Day trips to other locations in Arizona | 1 | 2 | 3 |
| P. Overnight trips to other locations in Arizona | 1 | 2 | 3 |
| Q. Dining | 1 | 2 | 3 |

**IF YES TO DINING (Q9 Q=1) GO TO Q9a;
OTHERWISE GO TO Q10**

9a. Did you visit the following type of restaurants when you were in Scottsdale?

| | Yes | No | Don't Recall |
|--|-----|----|--------------|
| A. Fine dining restaurants | 1 | 2 | 3 |
| B. Fast food restaurants like McDonald's, Subway or Taco Bell | 1 | 2 | 3 |
| C. Fast casual restaurants like Panera Bread, Culver's or Chipotle Mexican Grill | 1 | 2 | 3 |

10. Now I'd like to get some idea of your spending patterns while you were in Scottsdale. Thinking about a typical day during your visit, on average, how much did you and your travel party spend each day on the following items? When responding, please include the combined spending for all members of your travel party.

- A. On lodging / / / / /
- B. On food and beverage purchases / / / / /
- C. On entertainment including amusement, attraction and recreation fees / / / / /
- D. On daily local transportation including gas, taxi, limo, van service and public transportation including car rental / / / / /
- E. On arts purchases / / / / /
- F. On retail shopping / / / / /
- G. For any other things I haven't mentioned (SPECIFY) _____ / / / / /

11. When planning your trip to Scottsdale did you receive any printed material from the Scottsdale Convention and Visitor's Bureau? (GO TO Q12) Yes...1
(GO TO Q14) No...2
Not sure...3

12. Did you find the material you received from the Scottsdale Convention and Visitor's Bureau very useful, somewhat useful, or not very useful? Very useful...1
Somewhat Useful...2
Not very useful...3
Don't recall...4

12a. What additional information could the Scottsdale Convention and Visitor's Bureau have provided to you to aid in making your travel decision?

13. What specific information sources such as websites or publications do you utilize to obtain information prior to selecting a travel destination? (Get specific names, not general statements like the internet or magazines)

14. Next, have you made pleasure or vacation trips to any of the following travel destinations in the past 12 months? (ROTATE ALL EXCEPT K)

| | Yes | No |
|---|-----|----|
| A. Mexico | 1 | 2 |
| B. Los Angeles | 1 | 2 |
| C. Austin or San Antonio | 1 | 2 |
| D. San Diego | 1 | 2 |
| E. Palm Springs | 1 | 2 |
| F. Orlando or Miami | 1 | 2 |
| G. Hawaii | 1 | 2 |
| H. Colorado | 1 | 2 |
| I. Tucson | 1 | 2 |
| J. Las Vegas | 1 | 2 |
| K. And have you taken a cruise in the past 12 months? | 1 | 2 |

IF VISITED SCOTTSDALE (Q1=1) GO TO Q15; OTHERWISE GO TO Q18

15. Next, overall how would you rate Scottsdale as a vacation destination compared to other areas you visit - excellent, good, just ok or poor? (GO TO Q16) Excellent...1
Good...2
(GO TO 15a) Just ok...3
Poor...4

15a. Why do you rate Scottsdale as (just ok/poor)?

16. Do you plan on visiting Scottsdale again in the next 12 months? Yes...1 No...2

17. On a scale of 1 to 10 where 1 means not at all likely and 10 means extremely likely, how likely would you be to recommend Scottsdale to a friend or family member? (CODE NOT SURE 99) / / /

18. How many total trips, if any, have you made to Scottsdale in the past three years? 0...0 1...1 2...2 3...3 4...4 5-9...5 10 or more...6

19. Next, what are the one or two factors that are most important to you when selecting a destination to visit?

20. Now, before I finish, I need to ask you a couple of questions for classification purposes. First, which one of the following categories best describes your age? Under 25...1 25 to 34...2 35 to 44...3 45 to 54...4 55 to 64...5 65 or over...6 (DO NOT READ) Refused...7

21. And finally, which one of the following categories best describes your total family income for last year, I mean before taxes and including everyone in your household? Just stop me when I come to the correct category. (READ EACH) Under \$40,000...1 \$40,000 to \$54,999...2 \$55,000 to \$69,999...3 \$70,000 to \$84,999...4 \$85,000 to \$99,999...5 \$100,000 to \$149,999...6 \$150,000 to \$199,000...7 \$200,000 or over...8 (DON'T READ) Refused...9

Thank you very much, that completes this interview. If the Scottsdale Convention and Visitor's Bureau can be of any further help to you in the future, please give us a call at 1-800-782-1117.

NAME: _____ PHONE #: _____

OBSERVED DATA: Male...1 Female...2 ZIP CODE: _____ MONTH: _____