



Longwoods
Travel USA®

Scottsdale

2015 Visitor Report

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Introduction



- Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- This report provides an overview for Scottsdale's domestic tourism business in 2015.

Methodology



- Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders.
- For the 2015 travel year, this yielded:
 - 337,164 trips for analysis nationally:
 - 237,555 overnight trips
 - 99,609 day trips
- For Scottsdale, the following sample was achieved in 2015:
 - 985 trips:
 - 808 overnight trips
 - 177 day trips*
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings

Key Findings



- In 2015, Scottsdale had 8.6 million person trips, an increase of 3.1% over 2014. 52% were overnight trips and 48% were day trips.
- The overnight trips generated \$1.2 billion in spending, an increase of 11.8% over 2014.
- When asked about the main purpose of their overnight trip, 48% responded that they were visiting friends and relatives, while 35% said they were on marketable trips. Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip types were special event trips and touring through the region.
- The average number of nights spent in Scottsdale on an overnight trip was 3.9 nights (the same number of nights as 2014) and the average travel party size was 2.4 persons.

Key Findings – (Cont'd)



- ⦿ Travelers on overnight trips to Scottsdale were more likely to arrive by plane and less likely to travel in their own car than the national average.
- ⦿ Travelers on overnight trips to Scottsdale were most likely to engage social media by reading travel reviews, posting photos online and accessing news/promotions.
- ⦿ The top five states of origin for overnight trips were California, Arizona, Illinois, Colorado and Florida. The top six DMA's of origin were Los Angeles, Chicago, Phoenix, Tucson, New York and San Francisco.
- ⦿ The top five activities engaged in by travelers on overnight trips to Scottsdale were Shopping, Fine Dining, Swimming, visiting a Landmark/Historic Site and Hiking/Backpacking.

Key Findings – (Cont'd)



- Overall trip experience and friendliness of the people received the highest satisfaction ratings for overnight visitors to Scottsdale.
- 70% of overnight visitors had visited Scottsdale before, and 59% said they had visited in the past year.
- 49% of overnight trips were planned 2 months or less before the trip, and 7% did not plan anything in advance.
- “Airline” was the most frequently cited source of planning information at 25% and the top ranked method of booking at 28%.

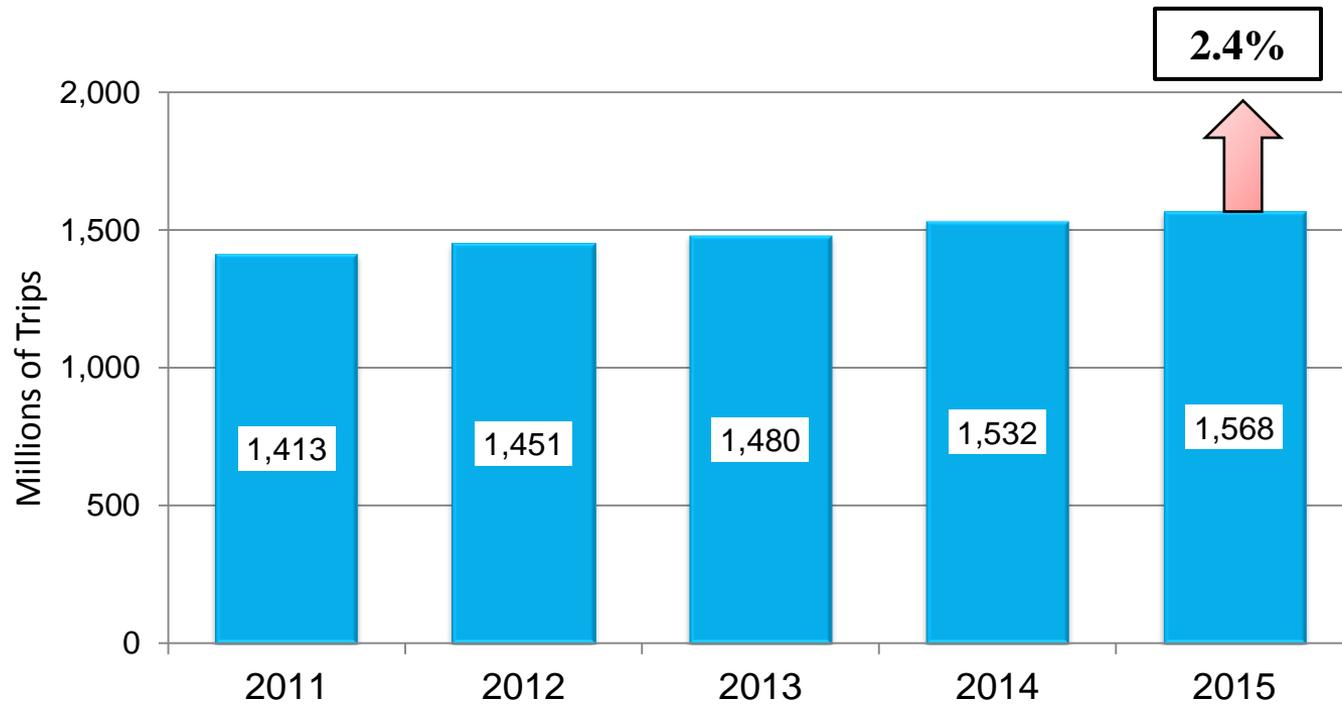


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2011-2015



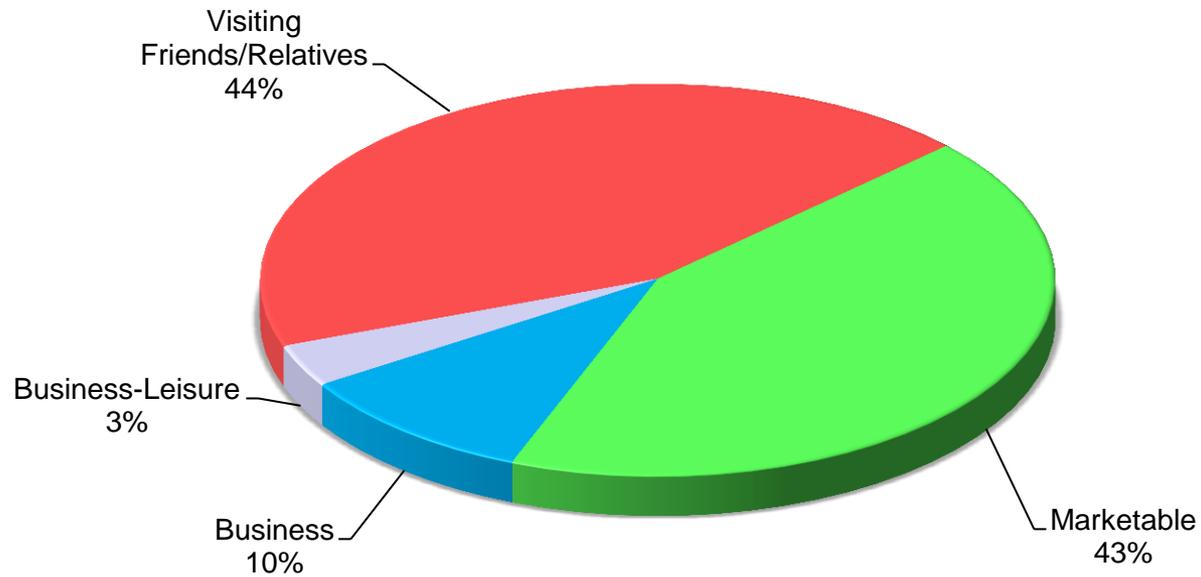
Base: Total Overnight Person-Trips



Structure of the U.S. Travel Market — 2015 Overnight Trips



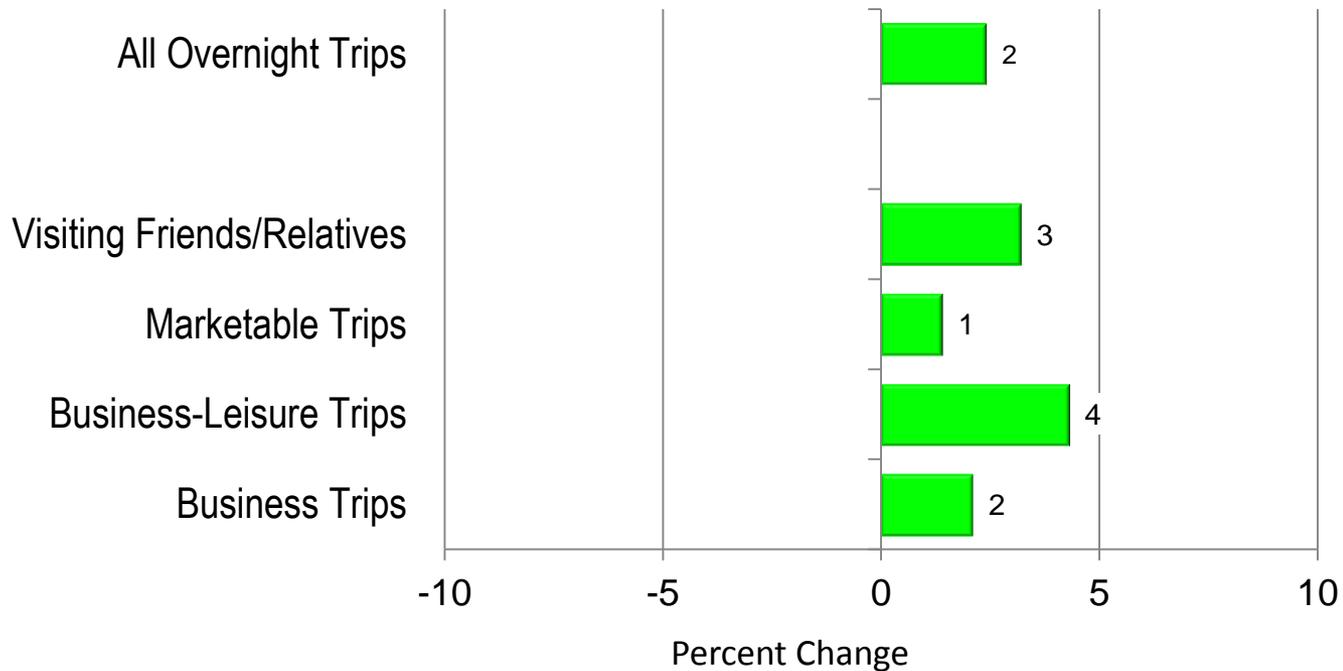
Base: Total Overnight Person-Trips



U.S. Market Trends for Overnight Trips – 2015 vs. 2014



Base: Total Overnight Person-Trips





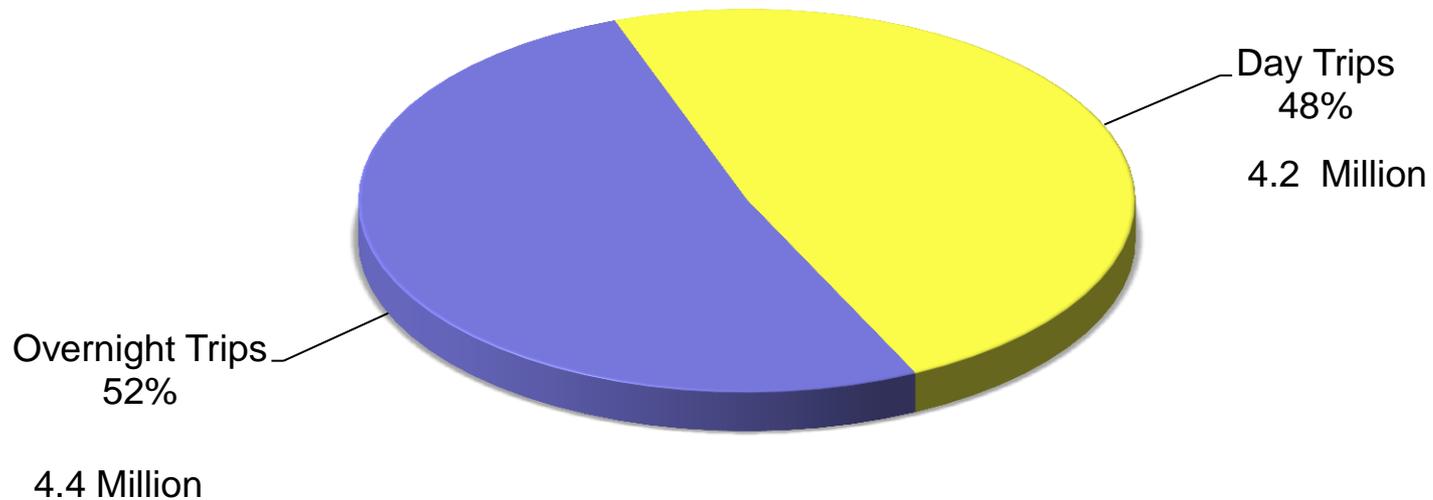
Size & Structure of Scottsdale's Travel Market

Total Size of the Scottsdale Travel Market in 2015



Total Person-Trips = 8.6 Million

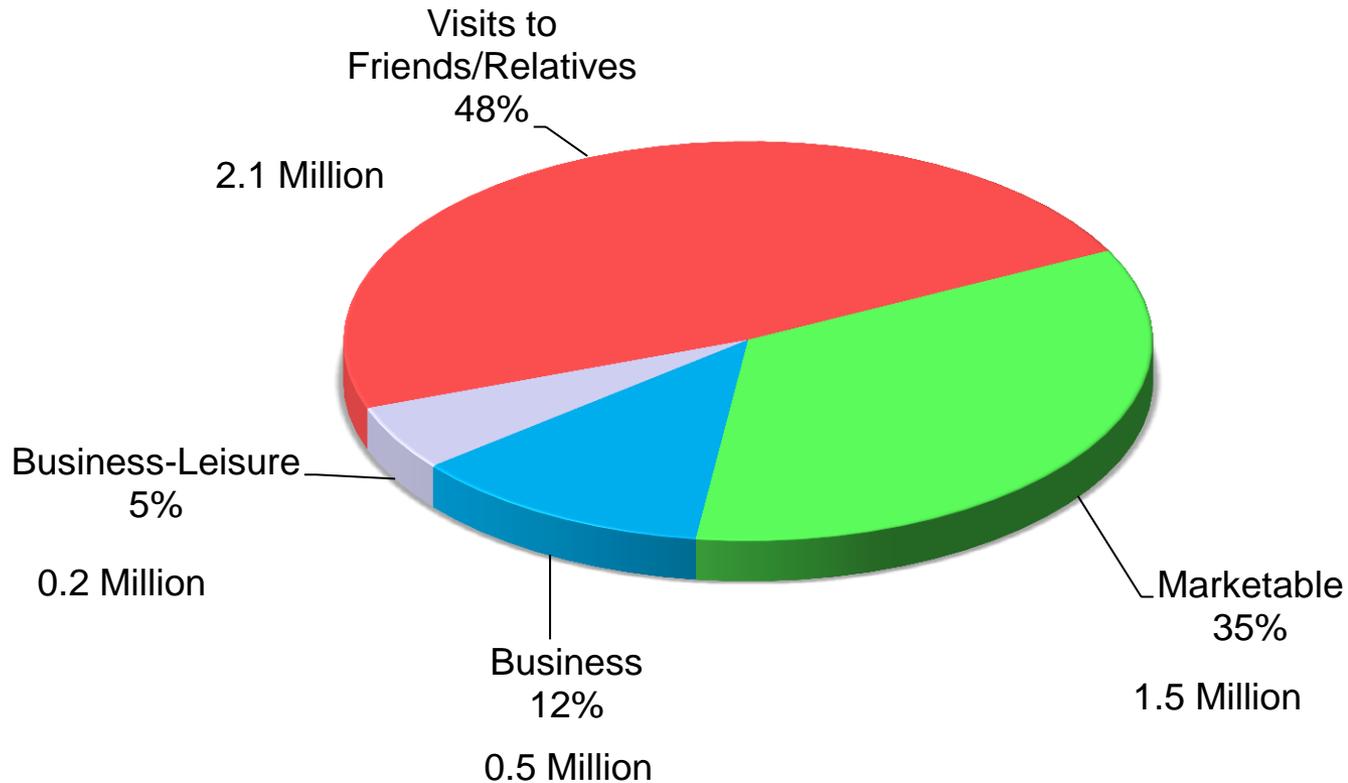
+3.1% vs. 2014



Scottsdale's Overnight Travel Market – by Trip Purpose



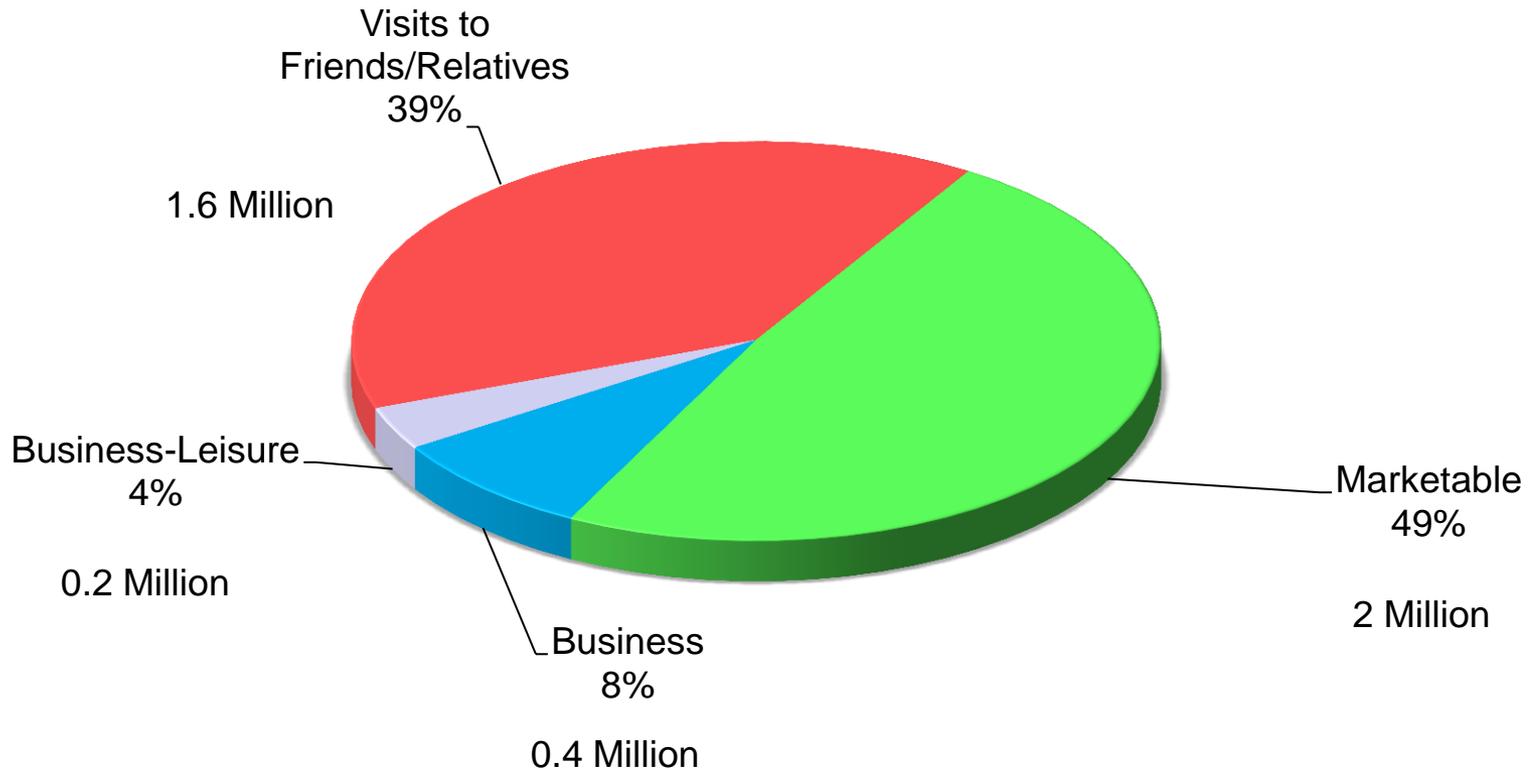
Total Overnight Person-Trips = 4.4 Million



Scottsdale's Day Travel Market — by Trip Purpose



Total Day Person-Trips = 4.2 Million





Overnight Trip Detail



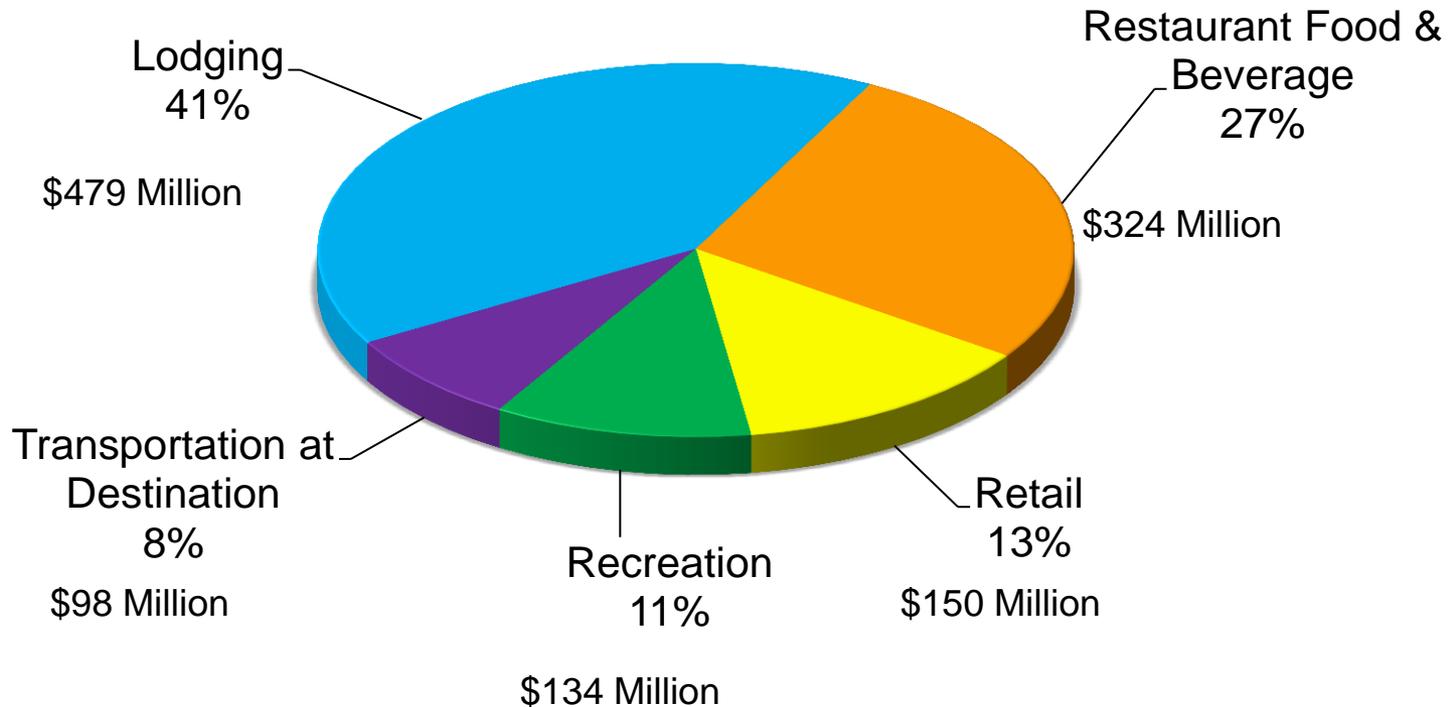
Overnight Expenditures

Total Overnight Spending – by Sector

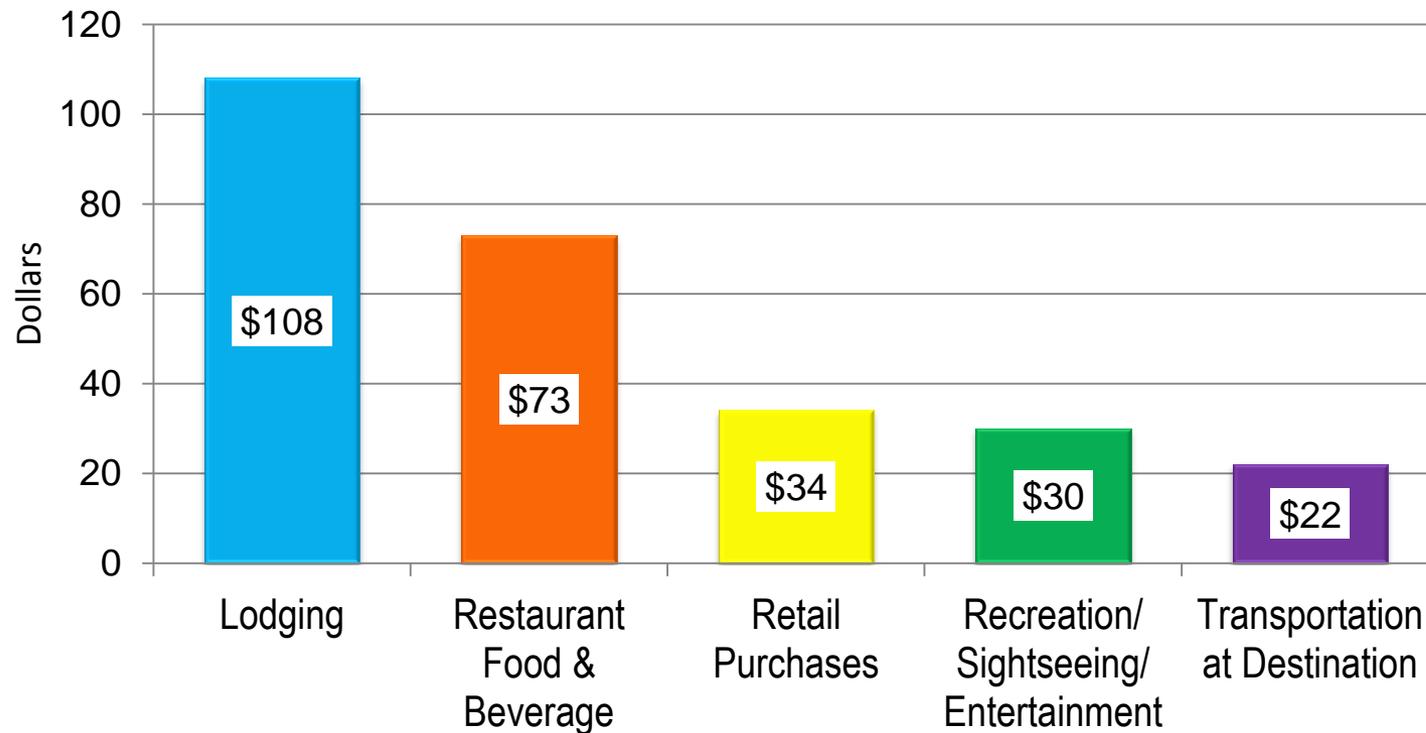


Total Spending = \$1.2 Billion

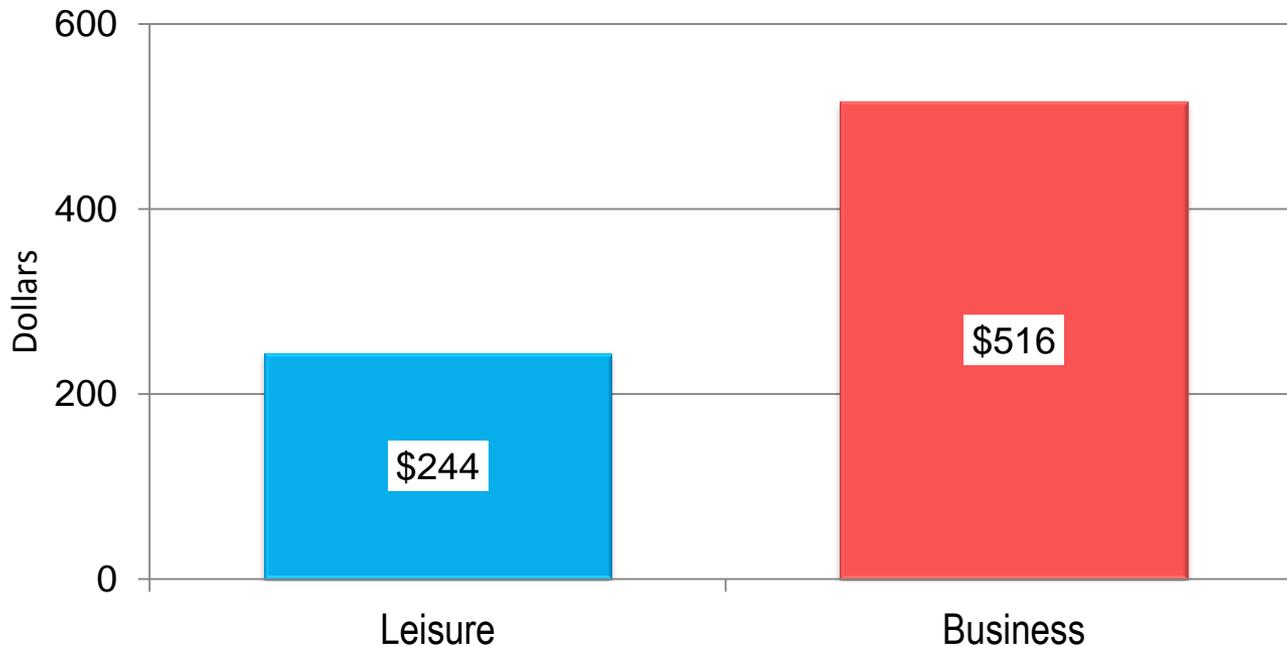
+11.8% vs. 2014



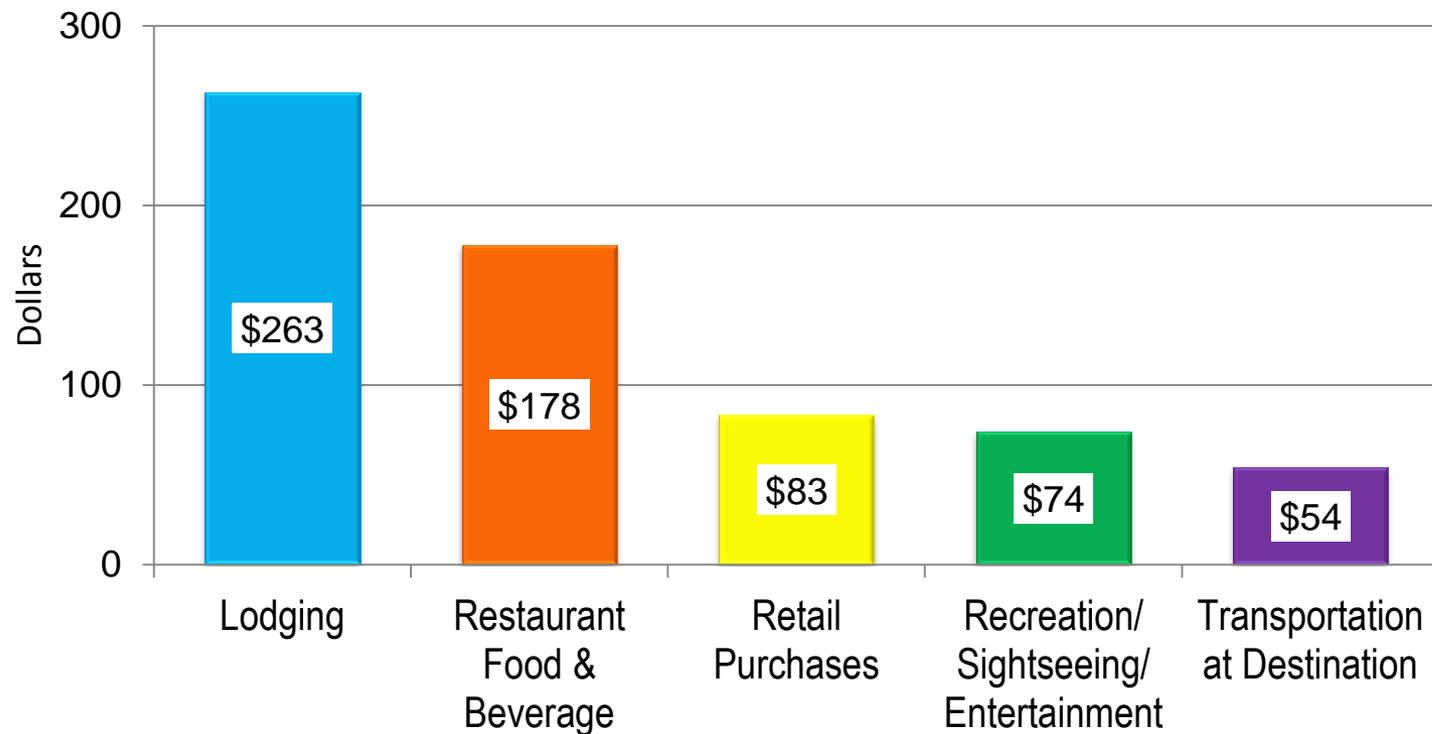
Average Per Person Expenditures on Overnight Trips – By Sector



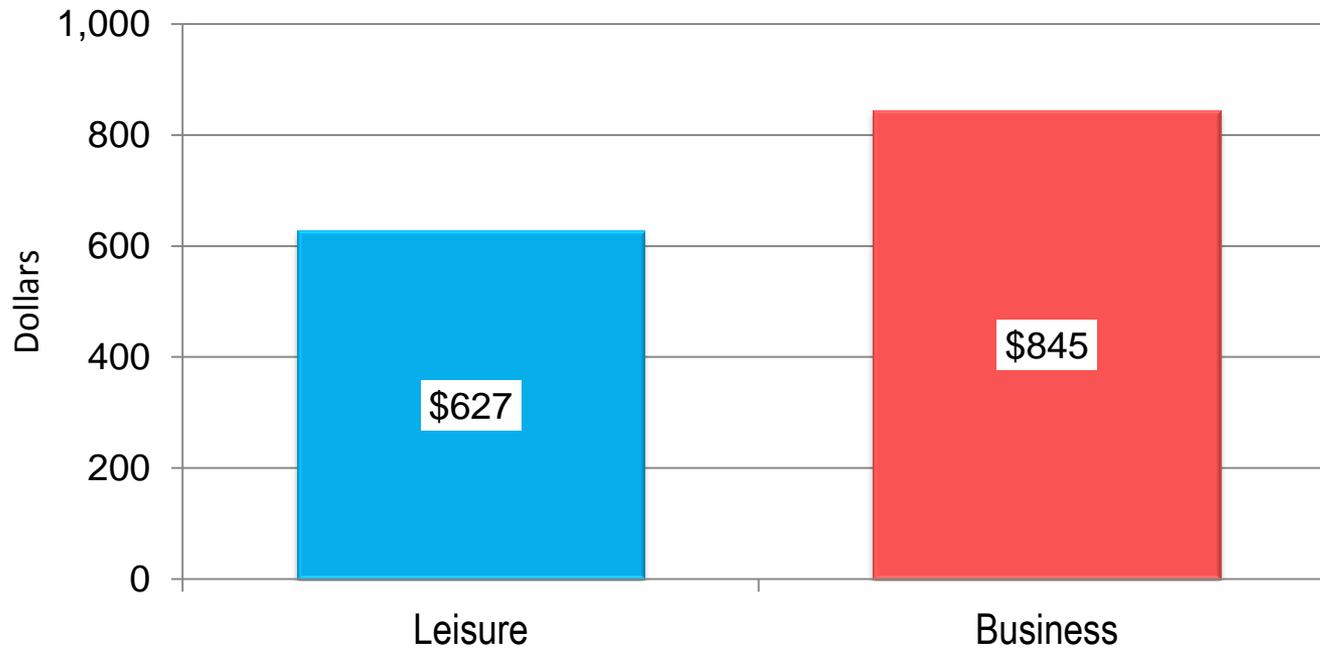
Average Per Person Expenditures on Overnight Trips – by Trip Purpose



Average Per Party Expenditures on Overnight Trips – By Sector



Average Per Party Expenditures on Overnight Trips — by Trip Purpose



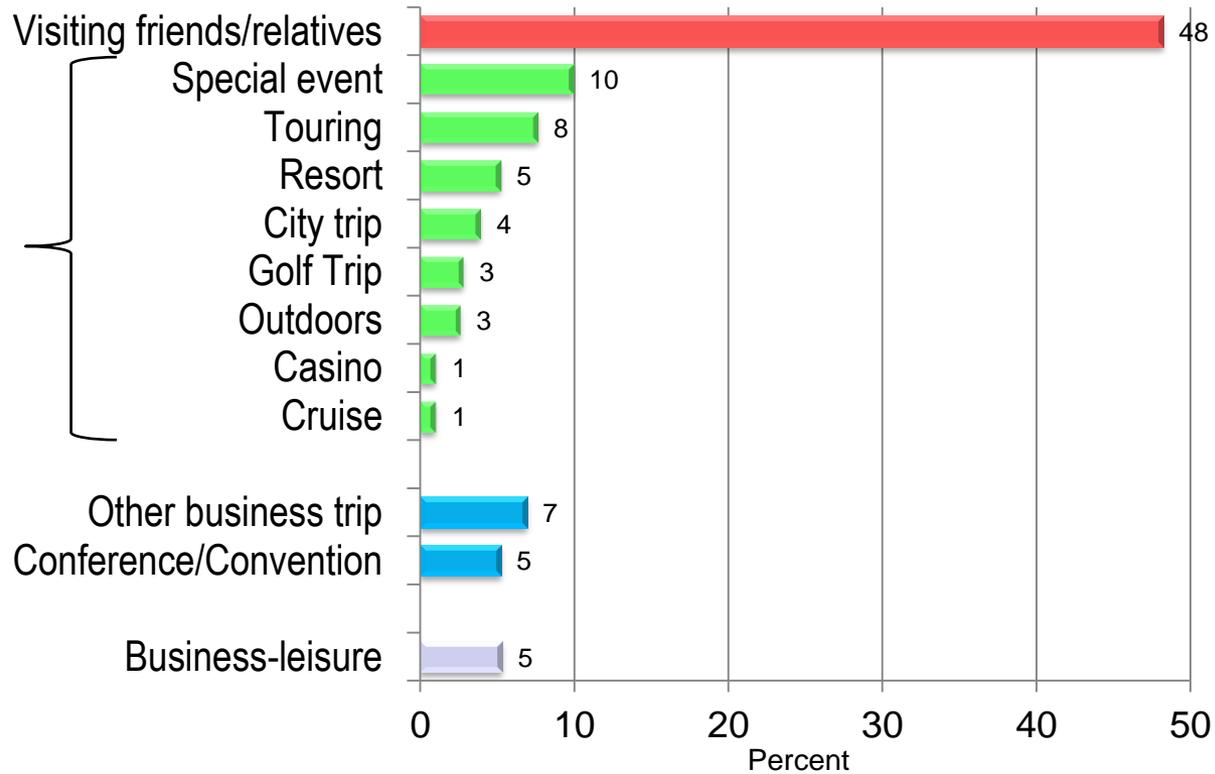


Overnight Trip Characteristics

Main Purpose of Trip



Base: Total Overnight Person-Trips

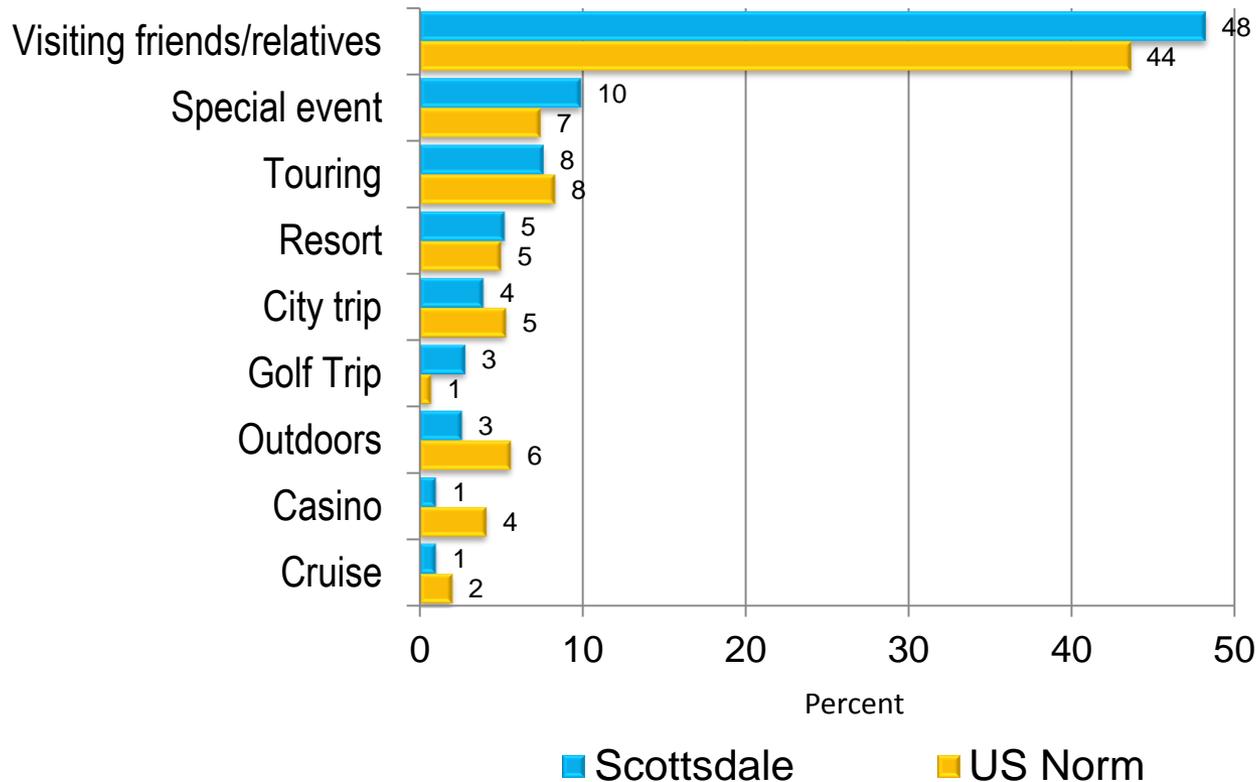


**Marketable
Trips
35%**

Main Purpose of Leisure Trip – Scottsdale vs. National Norm



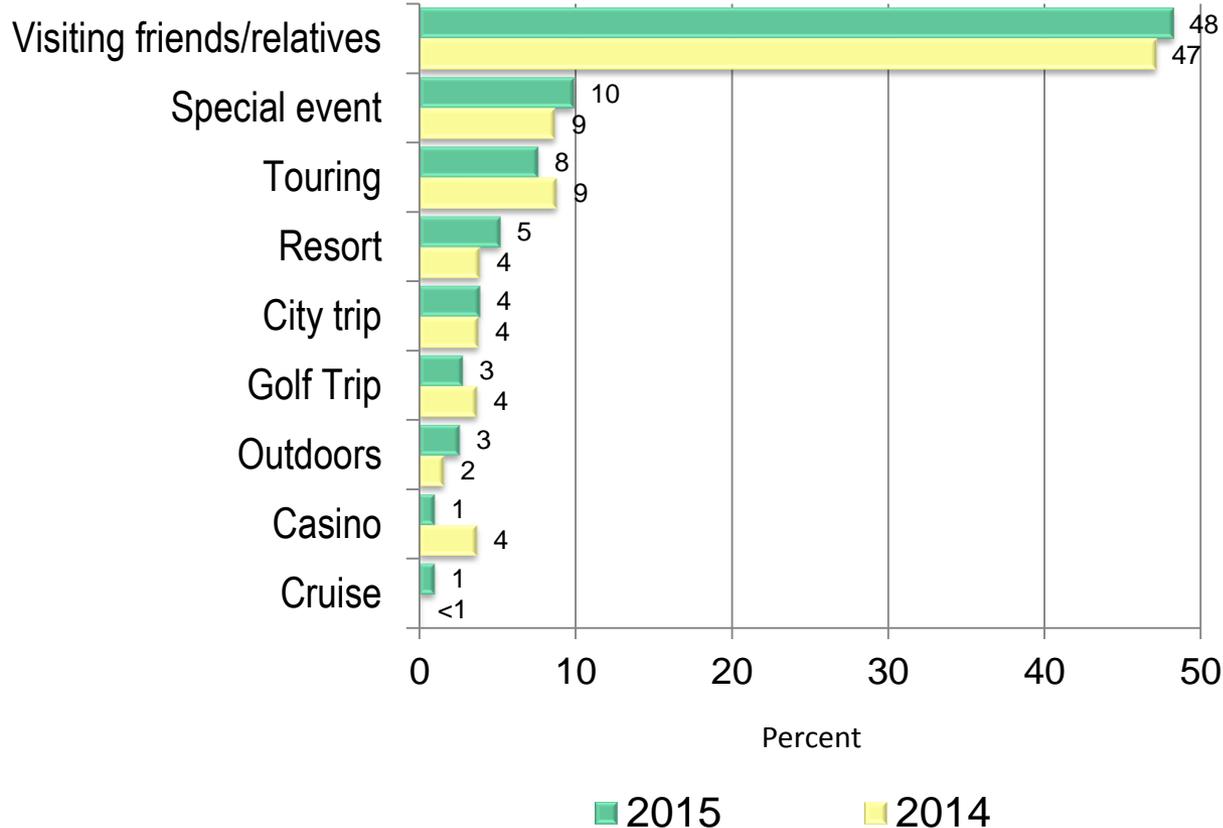
Base: Total Overnight Person-Trips



Main Purpose of Leisure Trip — 2015 vs. 2014



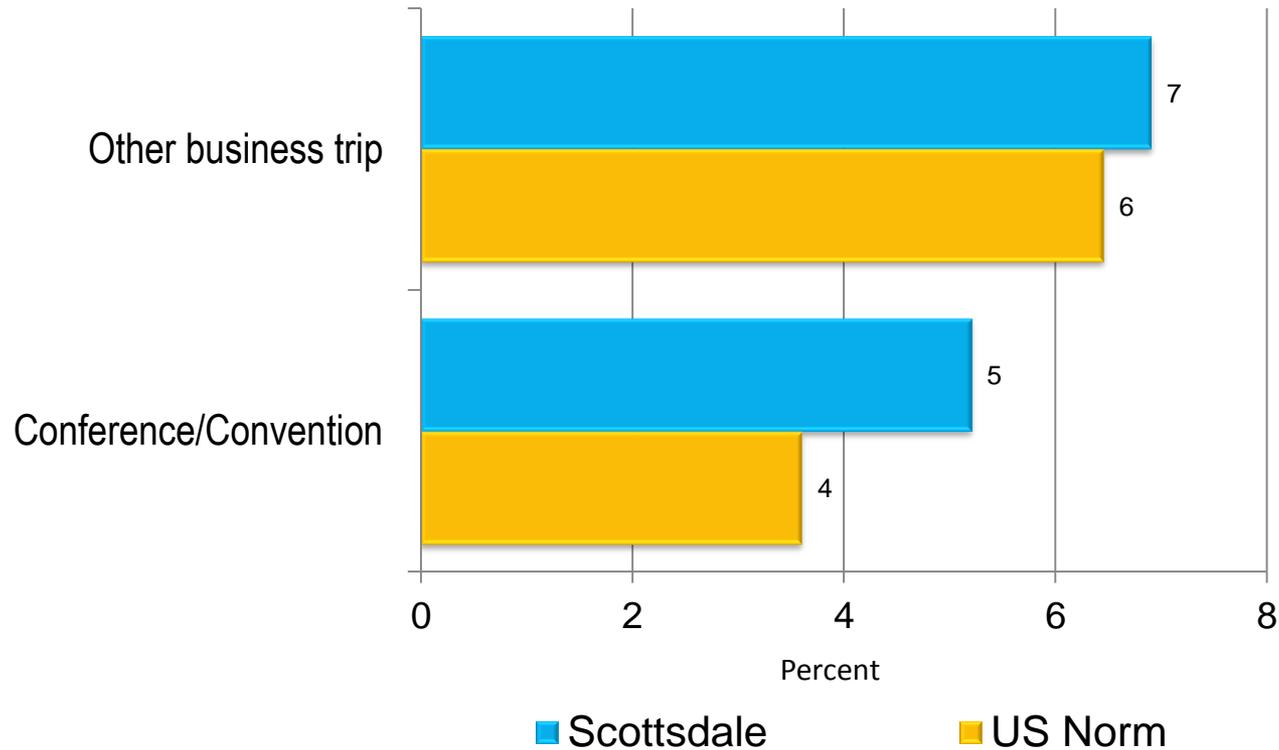
Base: Total Overnight Person-Trips



Main Purpose of Business Trip — Scottsdale vs. National Norm



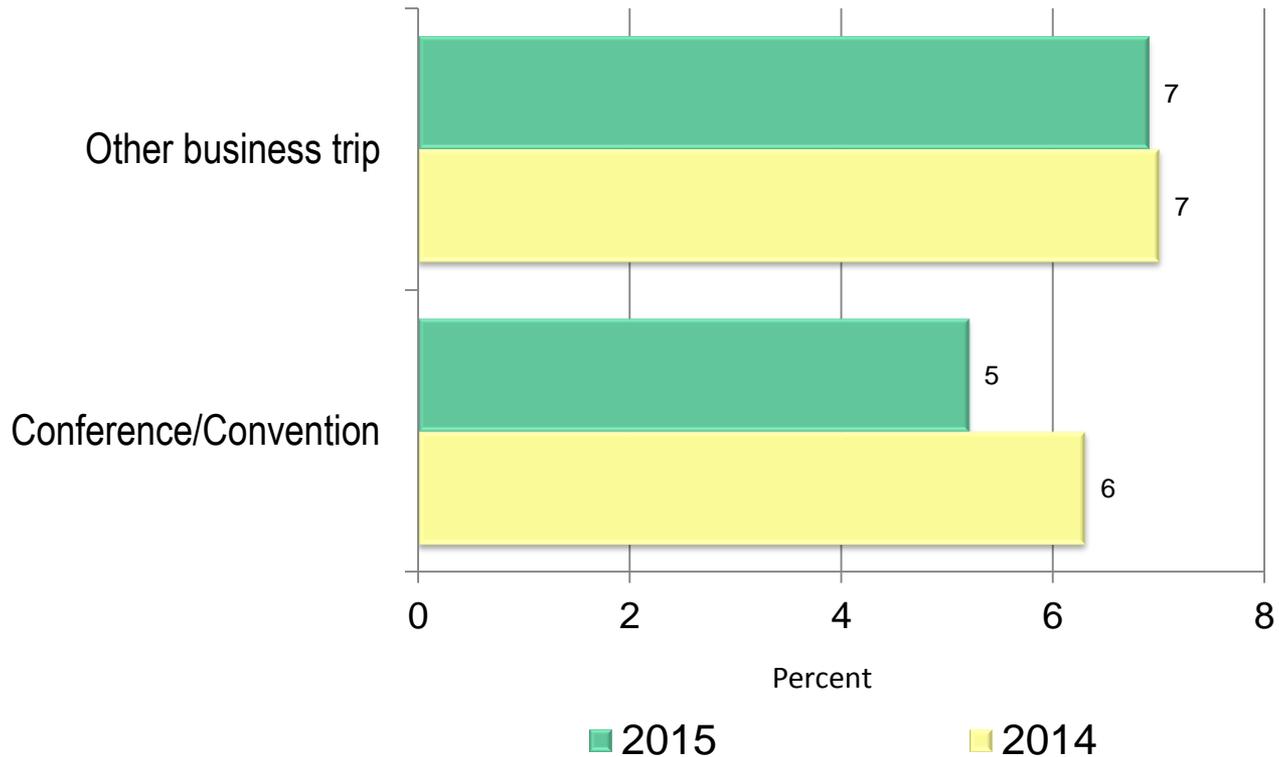
Base: Total Overnight Person-Trips



Main Purpose of Business Trip — 2015 vs. 2014



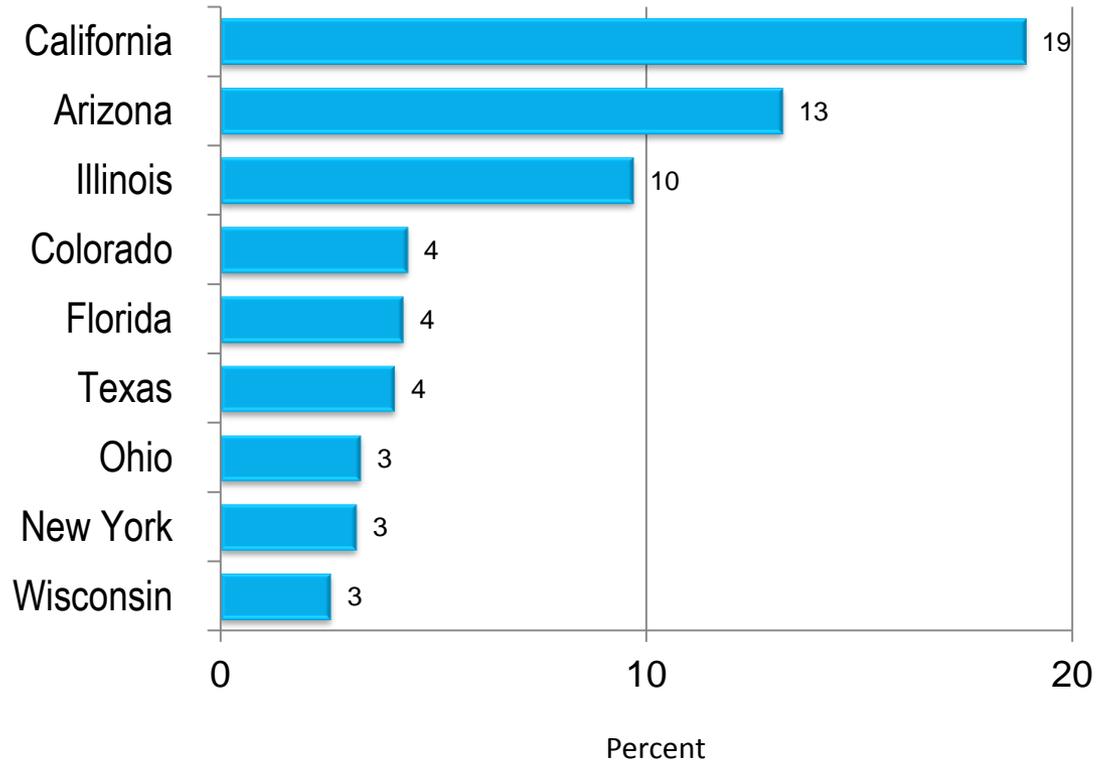
Base: Total Overnight Person-Trips



State Origin Of Trip



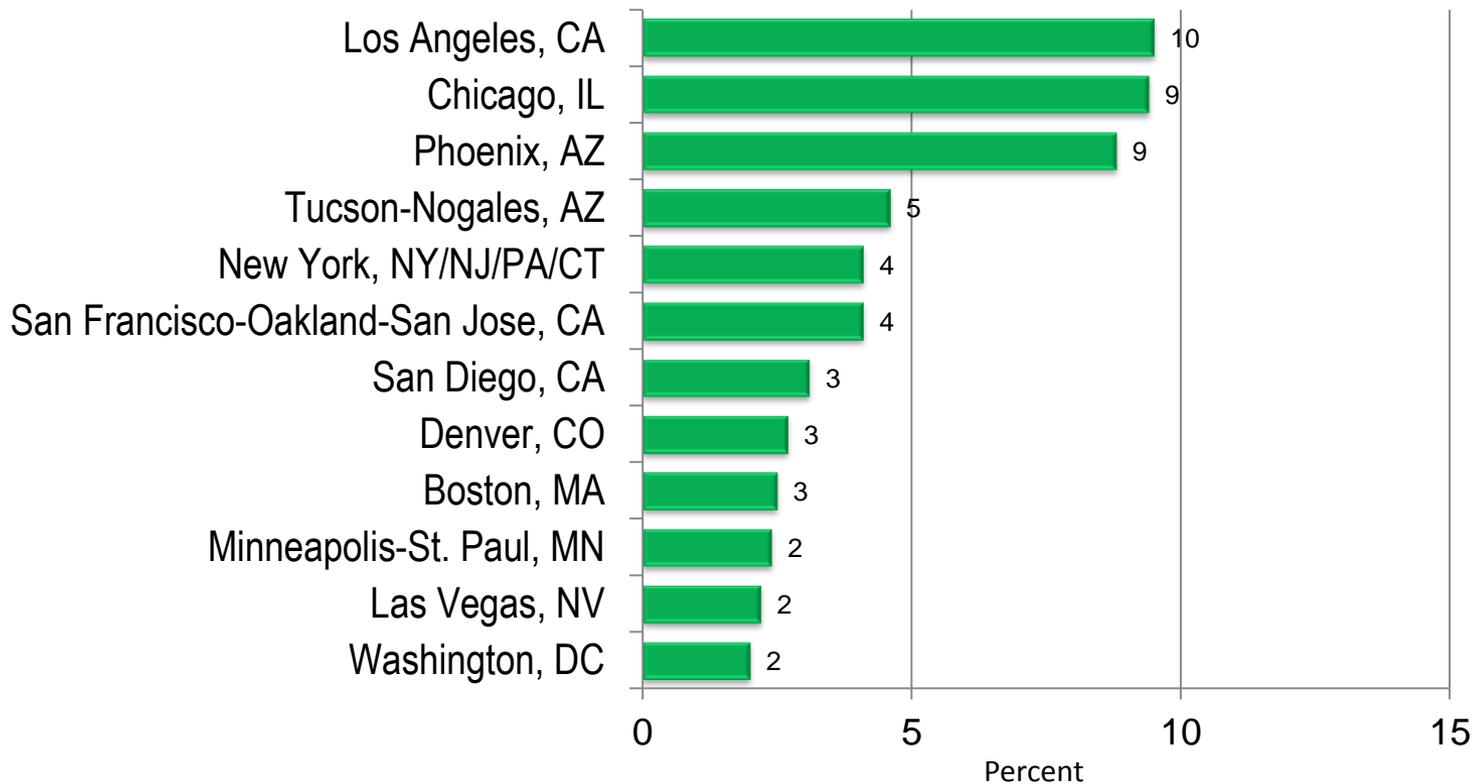
Base: Overnight Person-Trips to Scottsdale



DMA Origin Of Trip



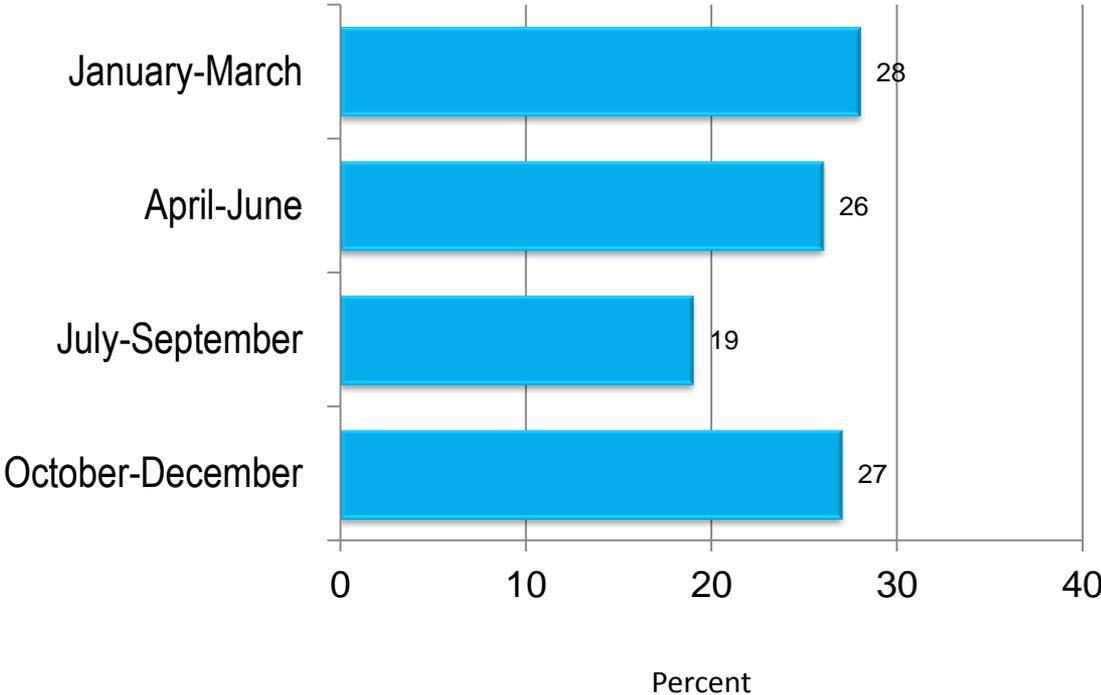
Base: Overnight Person-Trips to Scottsdale



Season of Trip



Base: Total Overnight Person-Trips

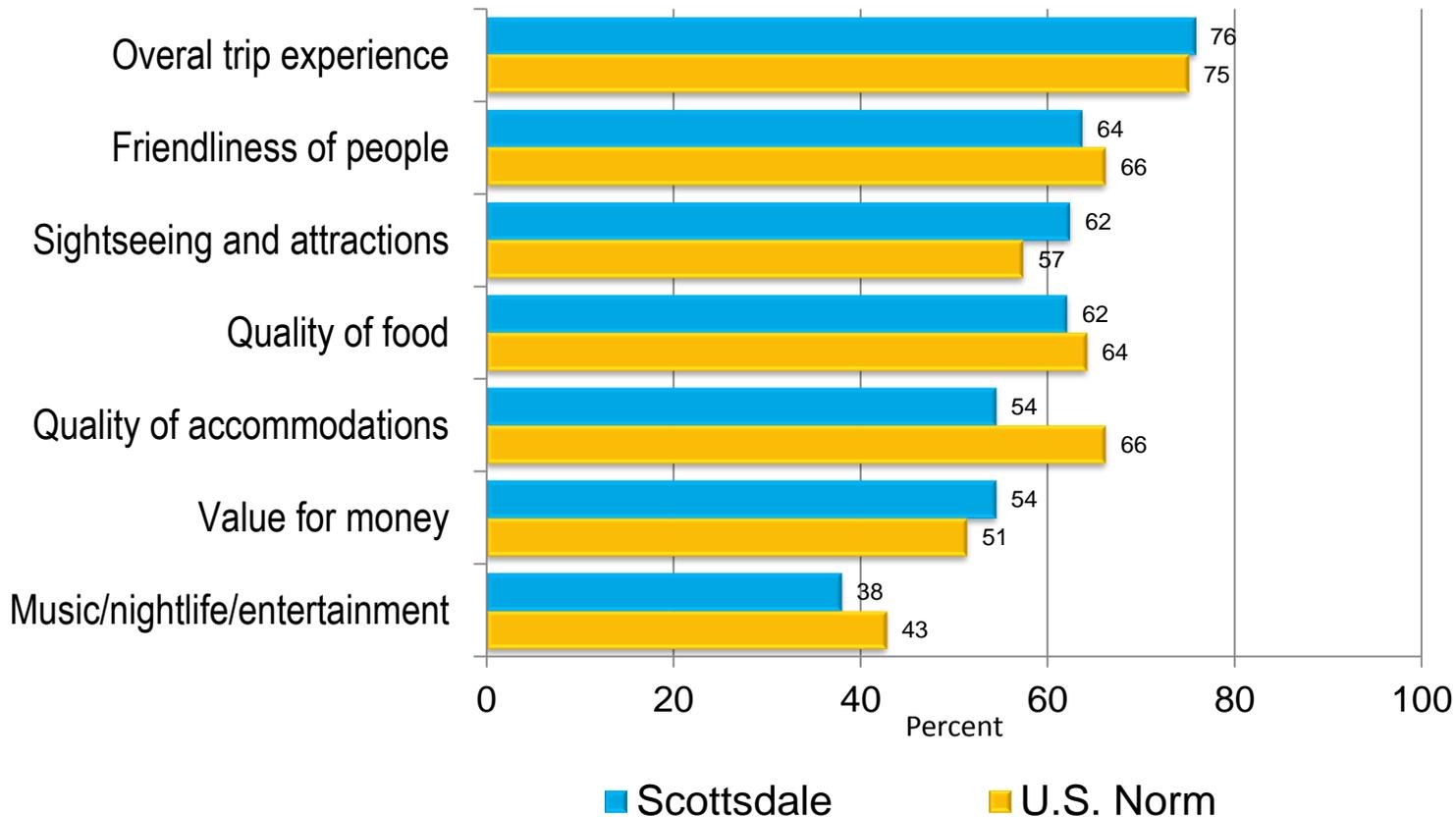


Satisfaction with Trip

% Very Satisfied



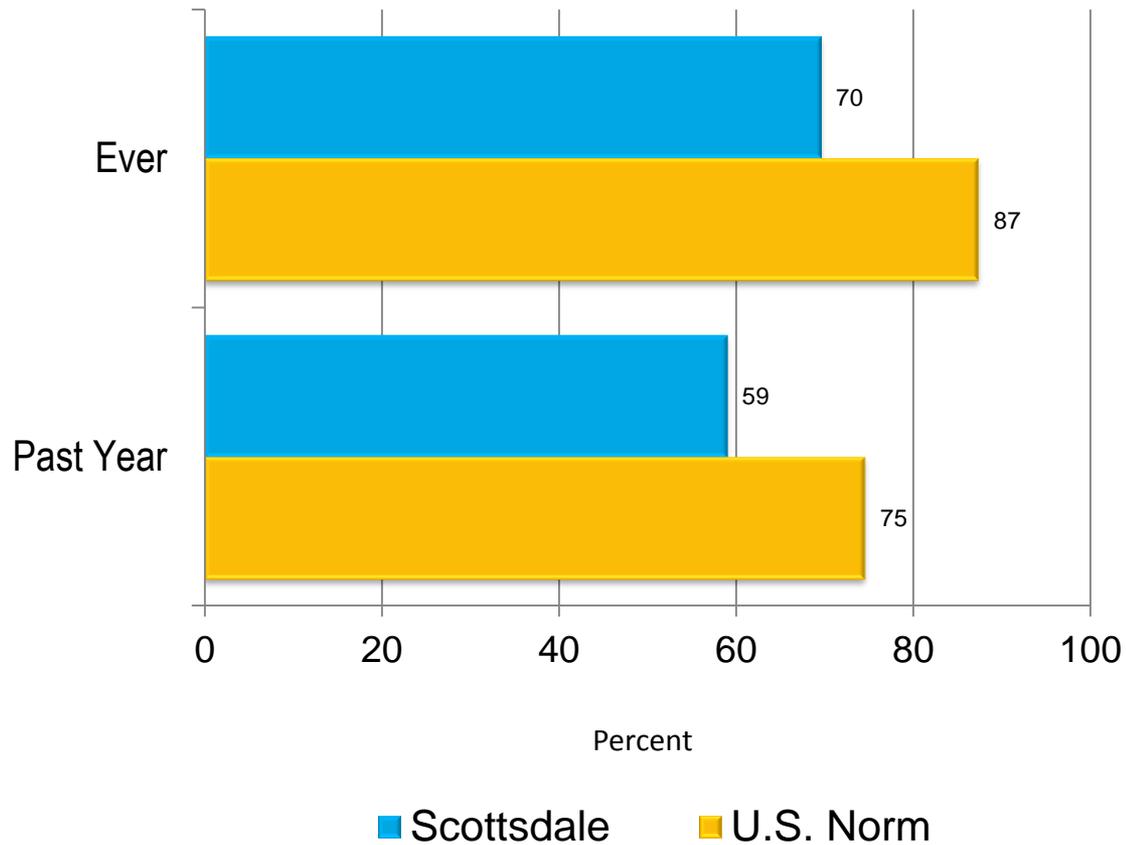
Base: Total Overnight Person-Trips



Past Visitation



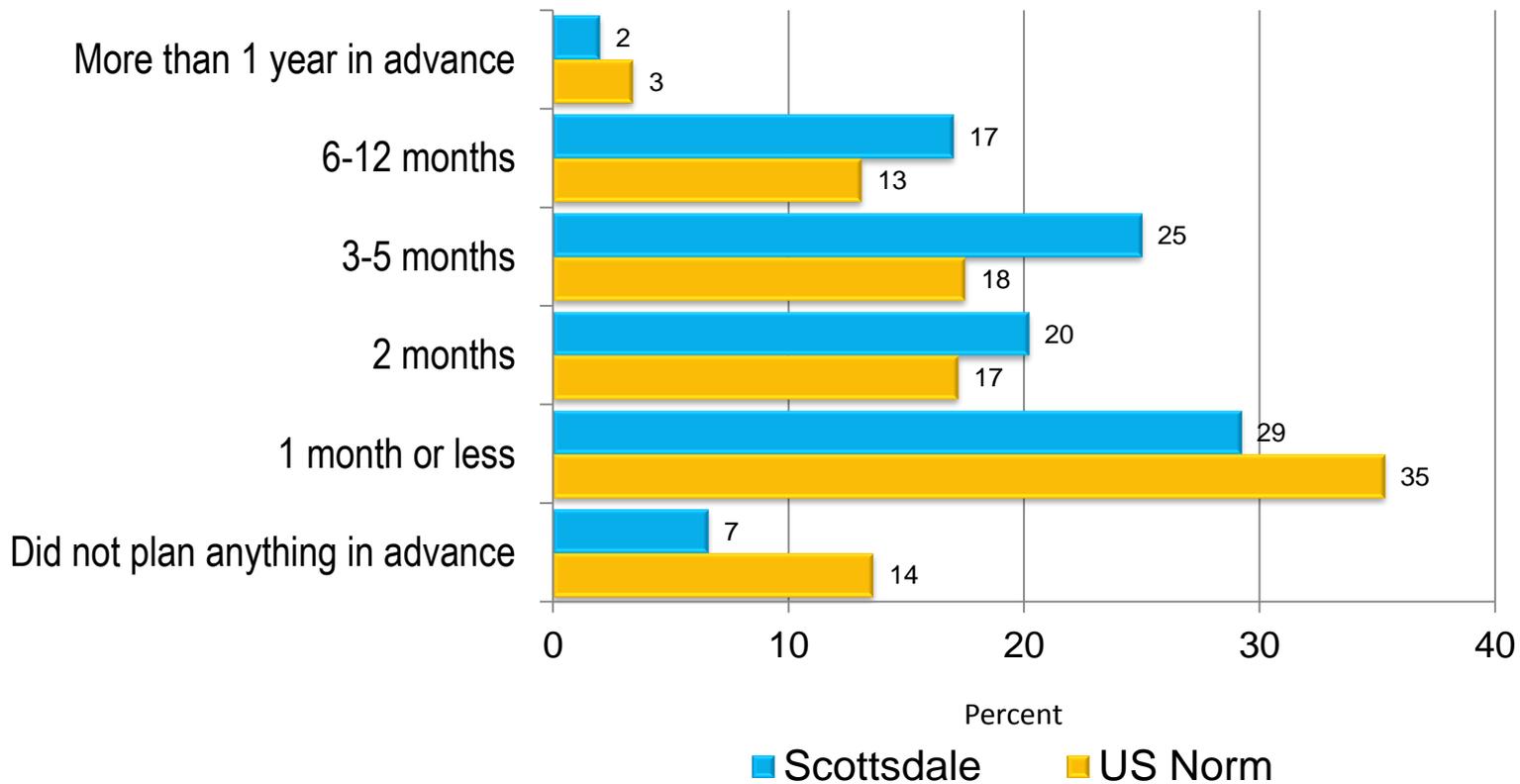
Base: Total Overnight Person-Trips



Length of Trip Planning



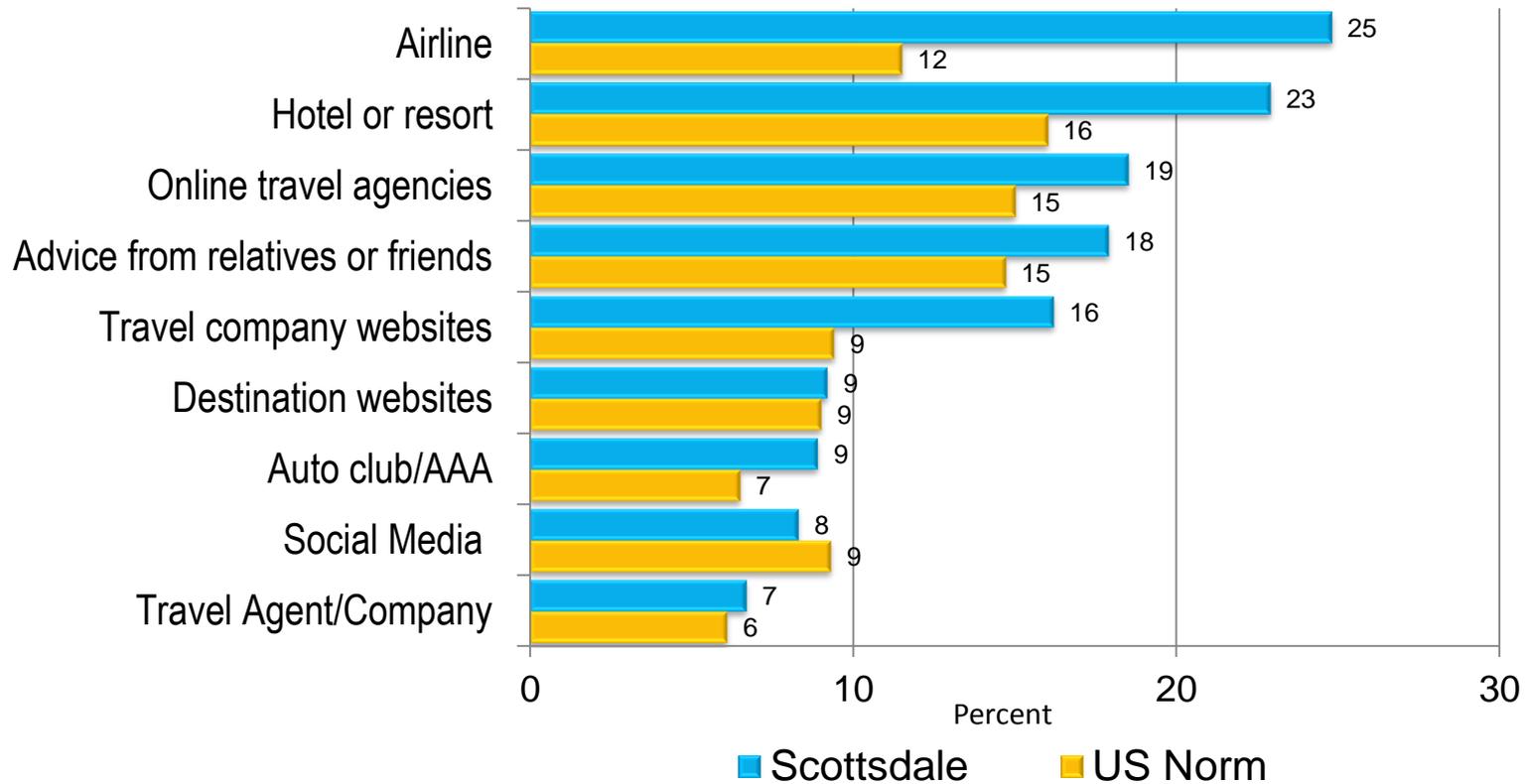
Base: Total Overnight Person-Trips



Trip Planning Information Sources



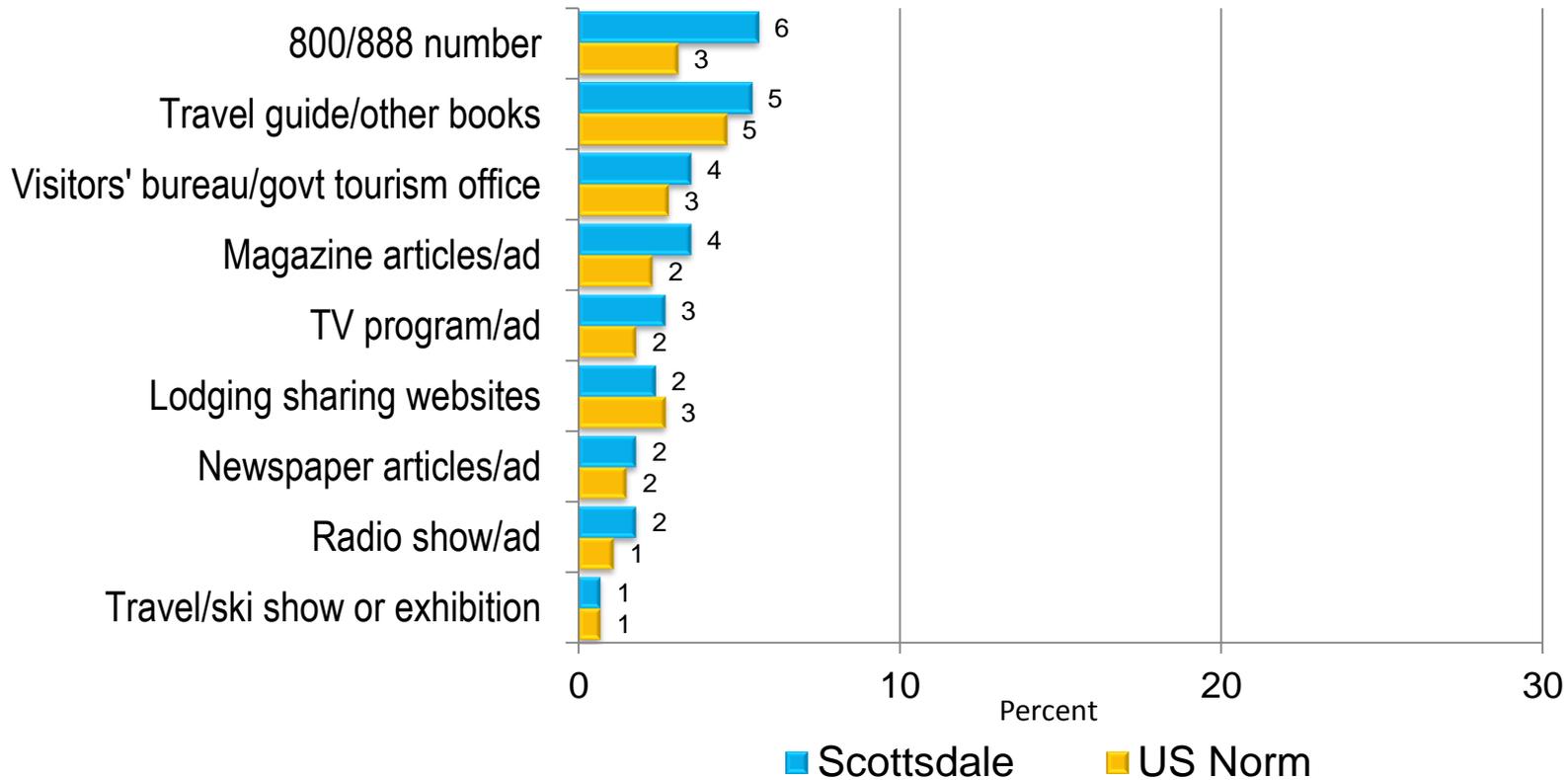
Base: Total Overnight Person-Trips



Trip Planning Information Sources (Cont'd)



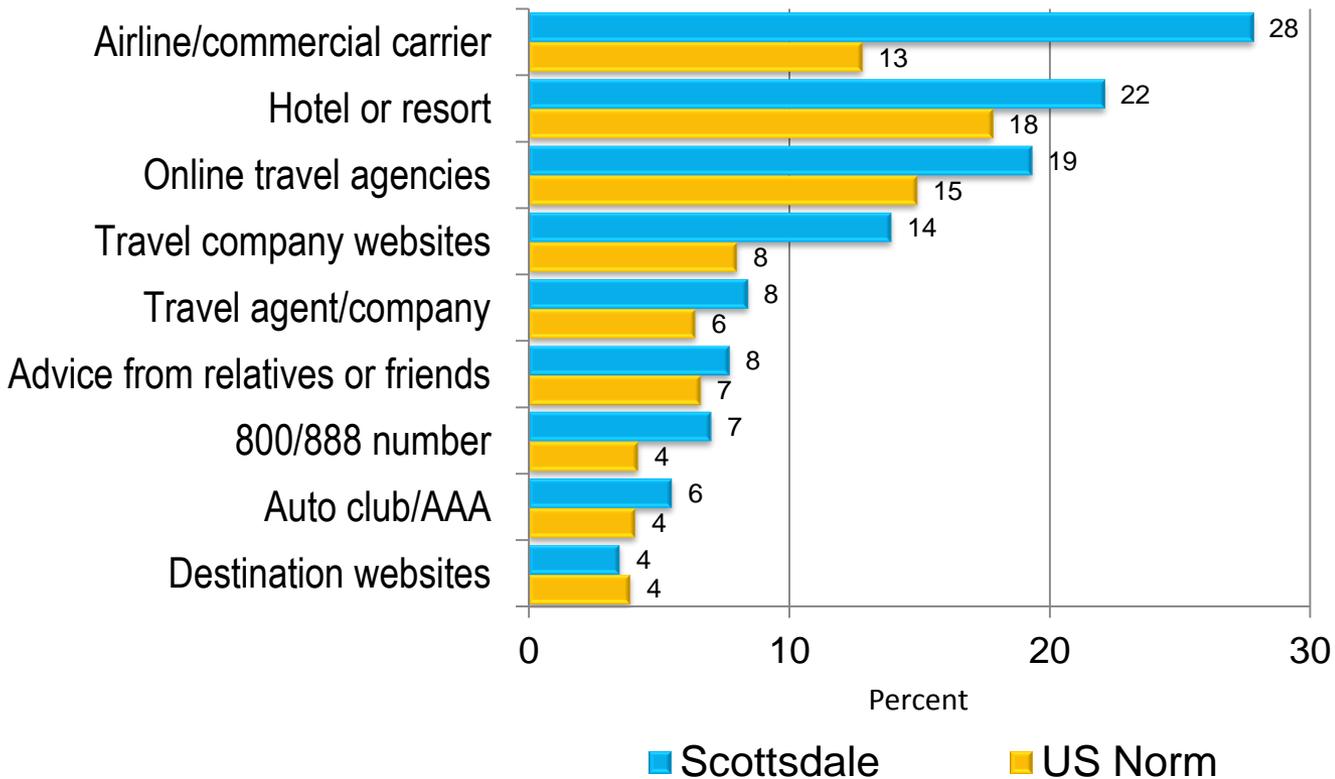
Base: Total Overnight Person-Trips



Method of Booking Trip



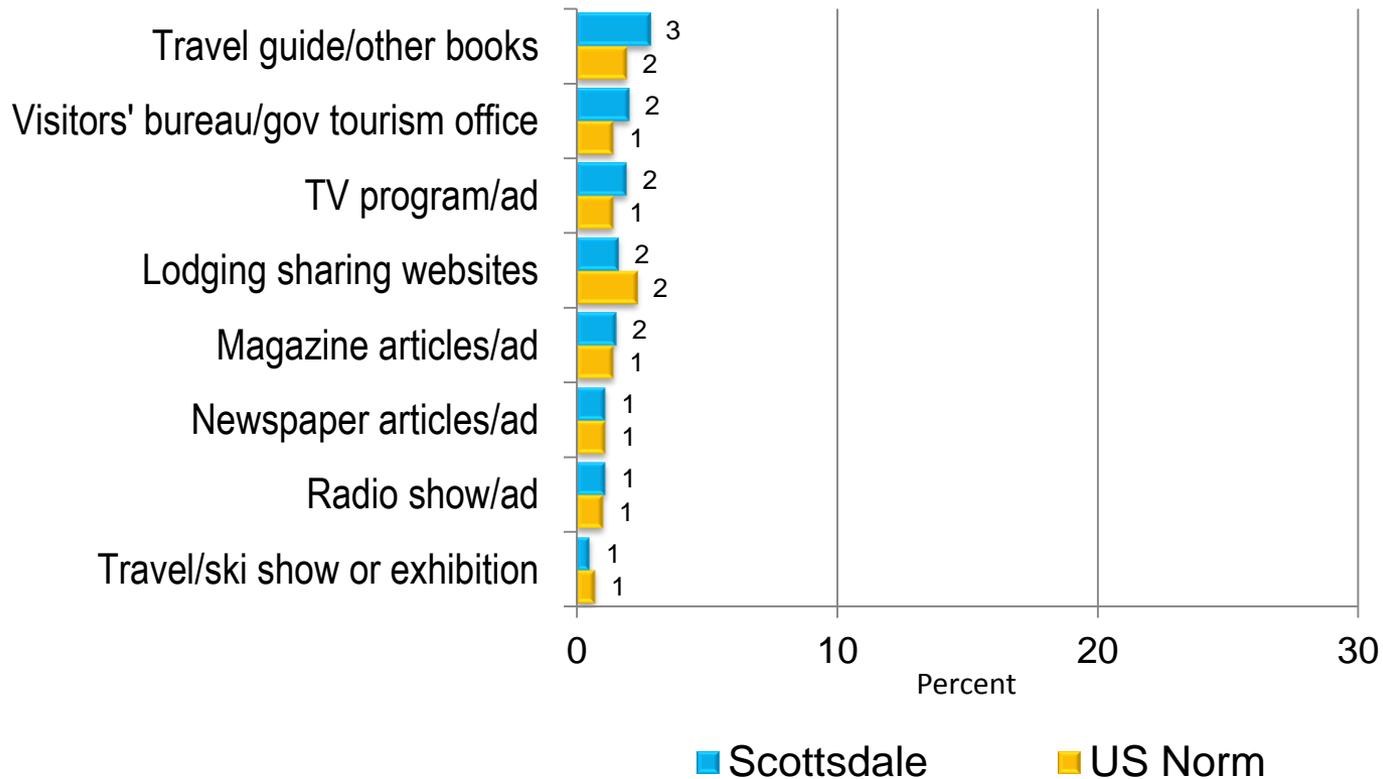
Base: Total Overnight Person-Trips



Method of Booking Trip (Cont'd)



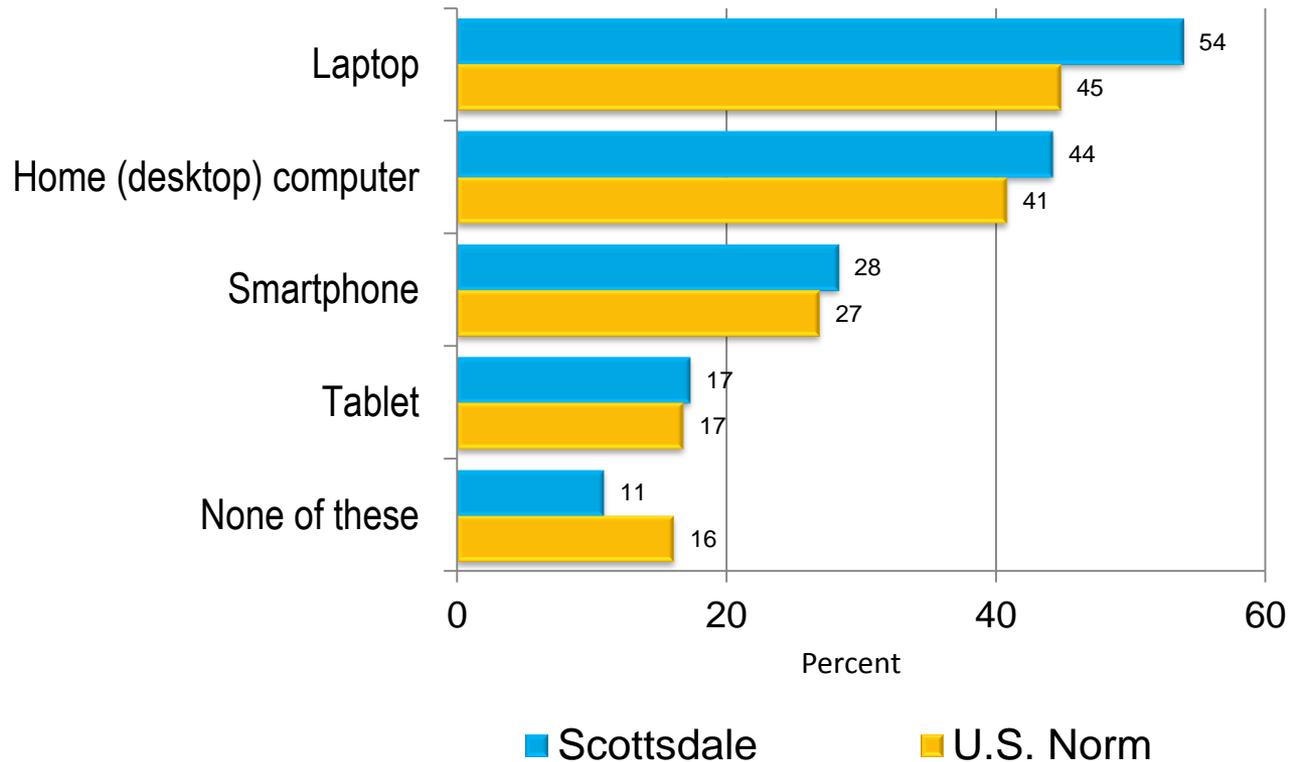
Base: Total Overnight Person-Trips



Devices Used for Trip Planning



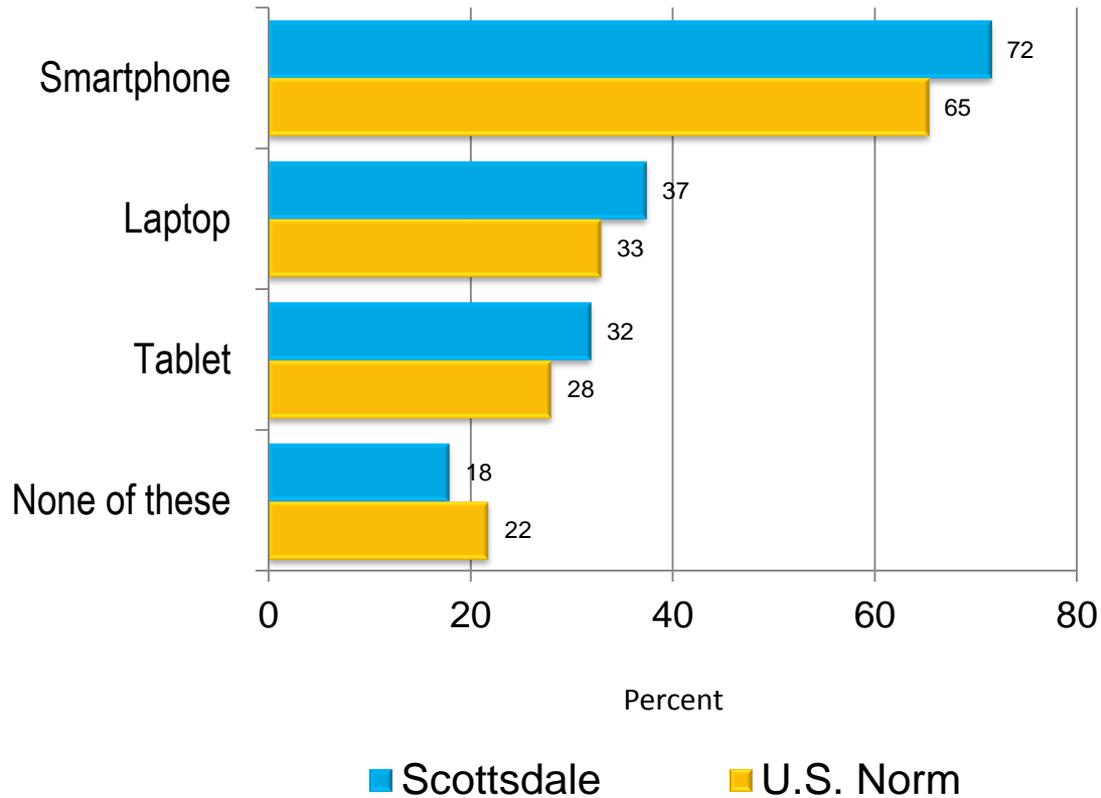
Base: Total Overnight Person-Trips



Devices Used During Trip



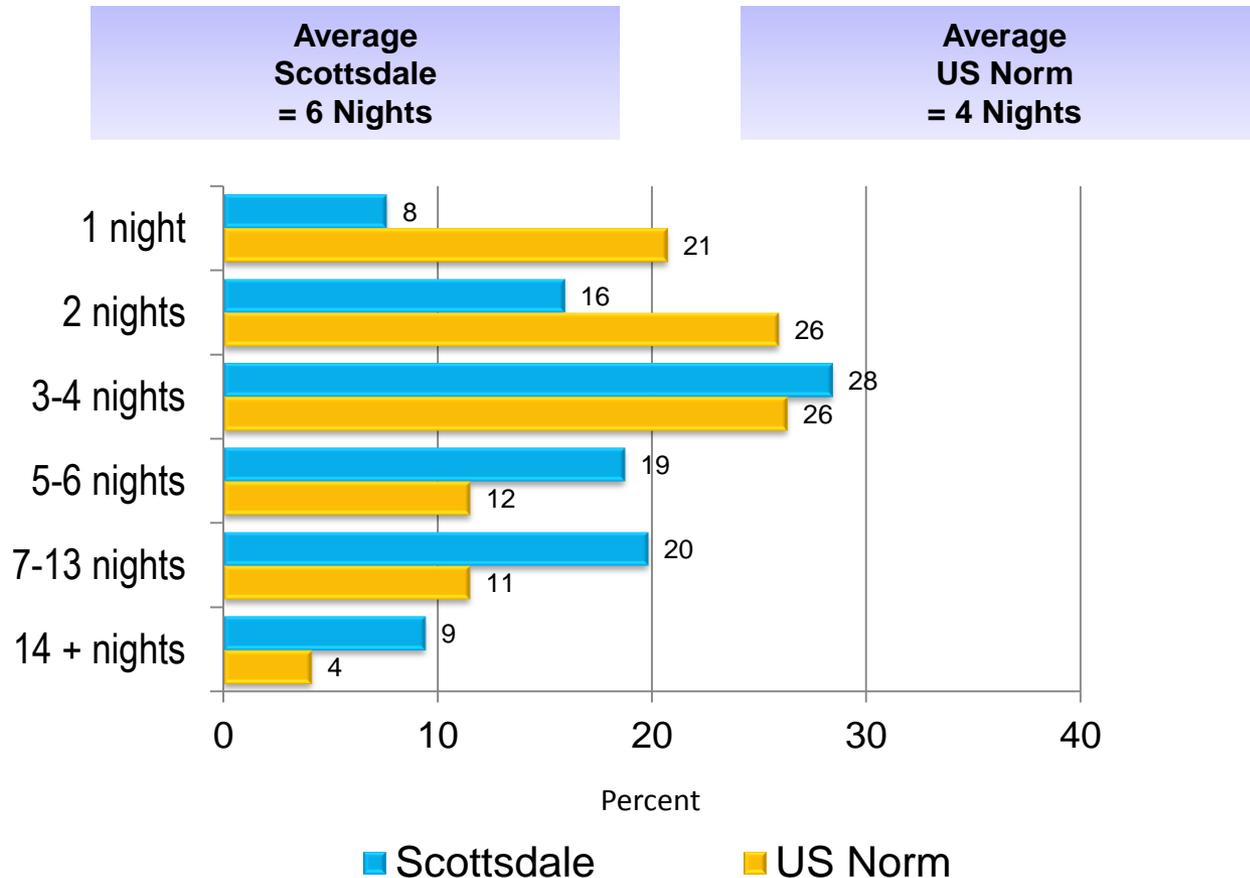
Base: Total Overnight Person-Trips



Total Nights Away on Trip



Base: Total Overnight Person-Trips

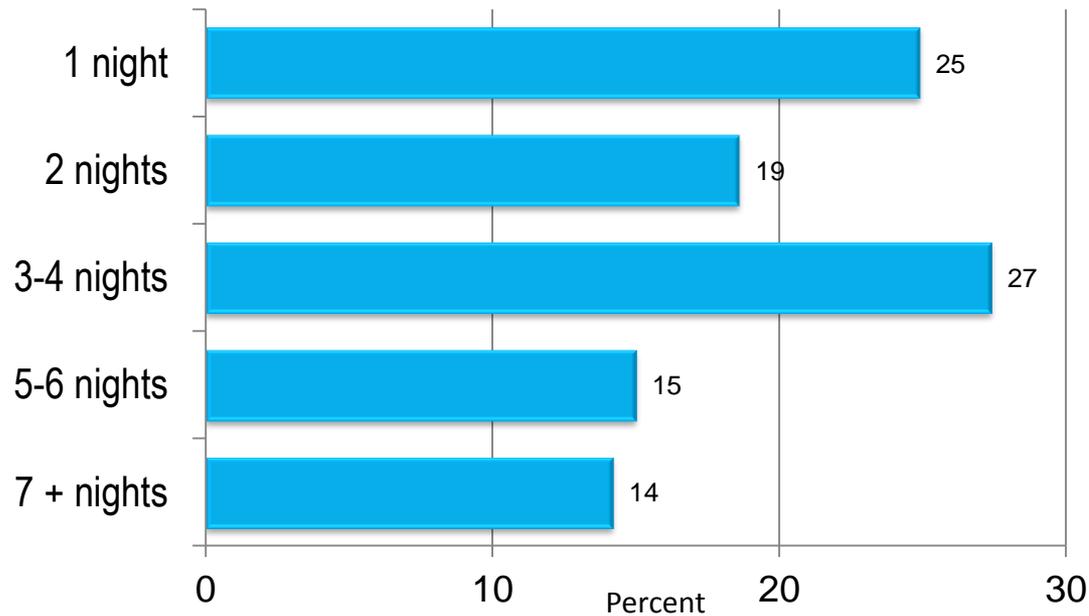


Number of Nights Spent in Scottsdale



Base: Total Overnight Person-Trips with 1+ nights spent in Scottsdale

Average Nights Spent in Scottsdale = 3.9

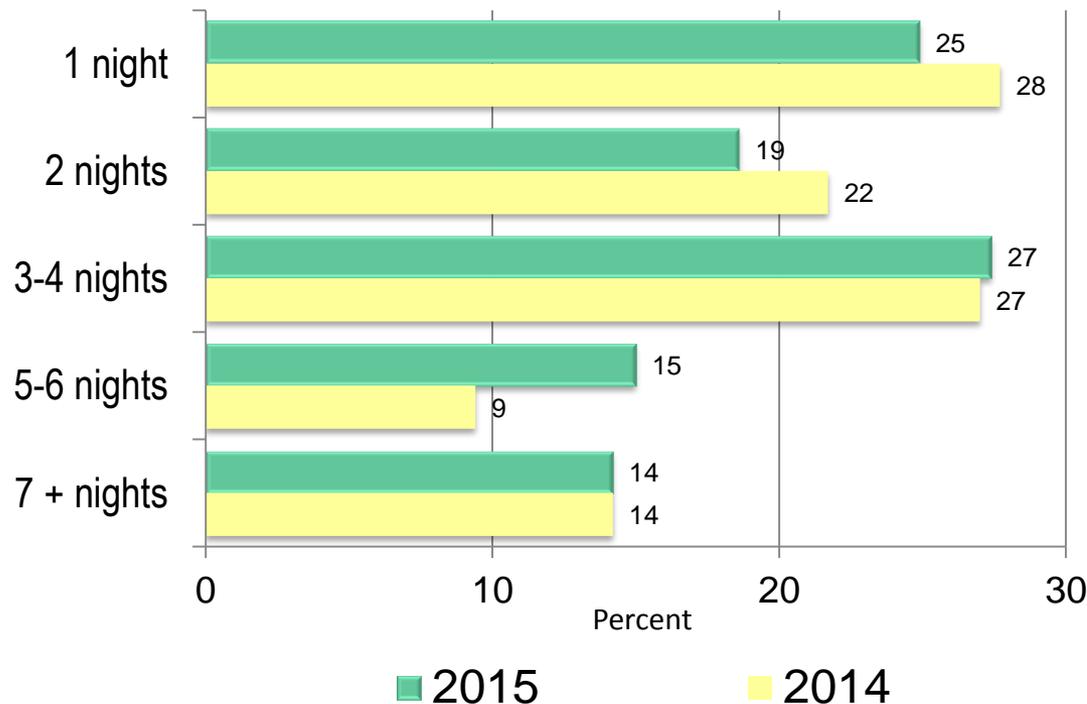


Number of Nights Spent in Scottsdale 2015 vs. 2014



Base: Total Overnight Person-Trips with 1+ nights spent in Scottsdale

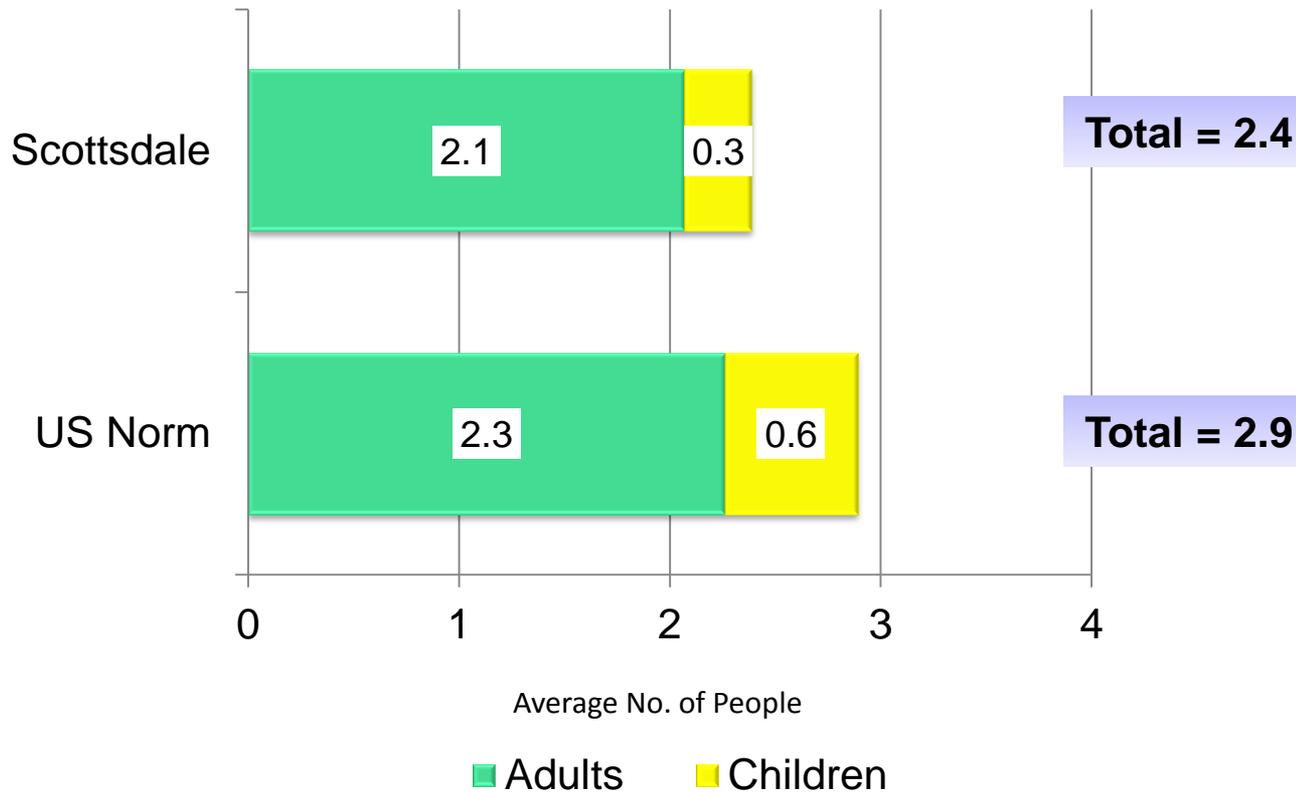
Average Nights Spent in Scottsdale
2014 = 3.9 2015 = 3.9



Size of Travel Party



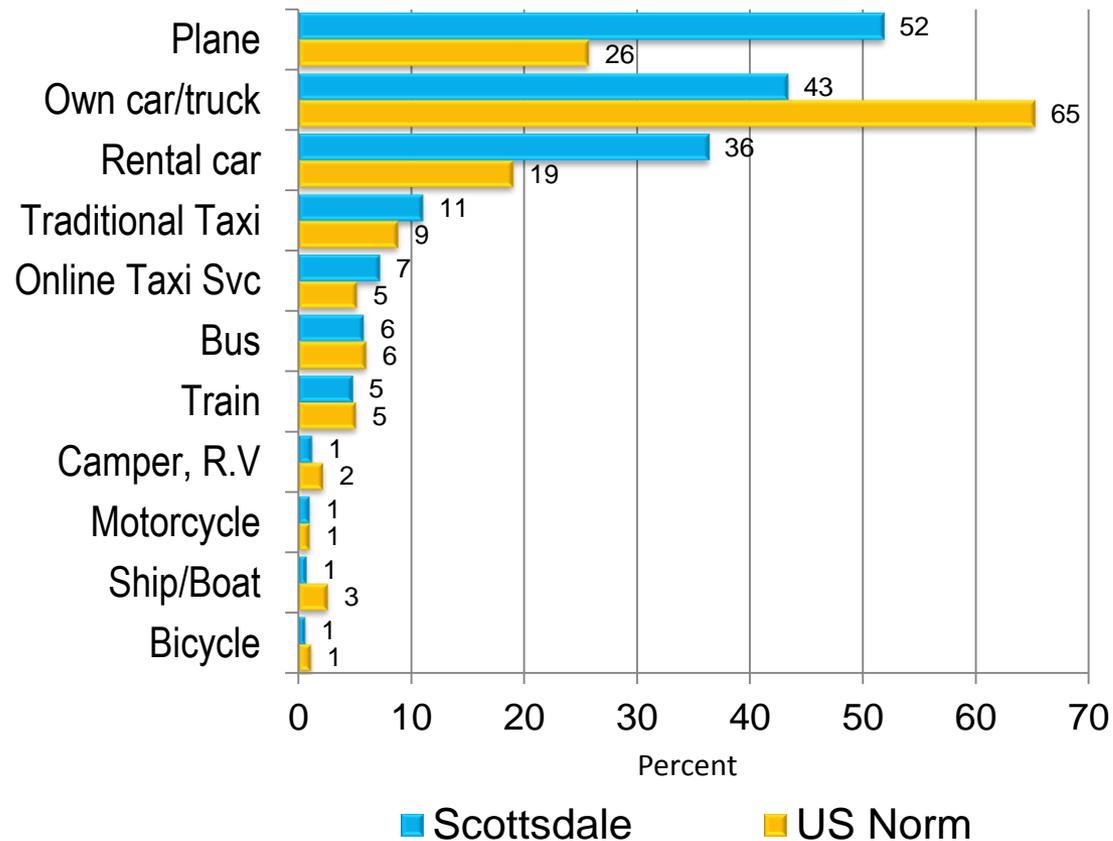
Base: Total Overnight Person-Trips



Transportation



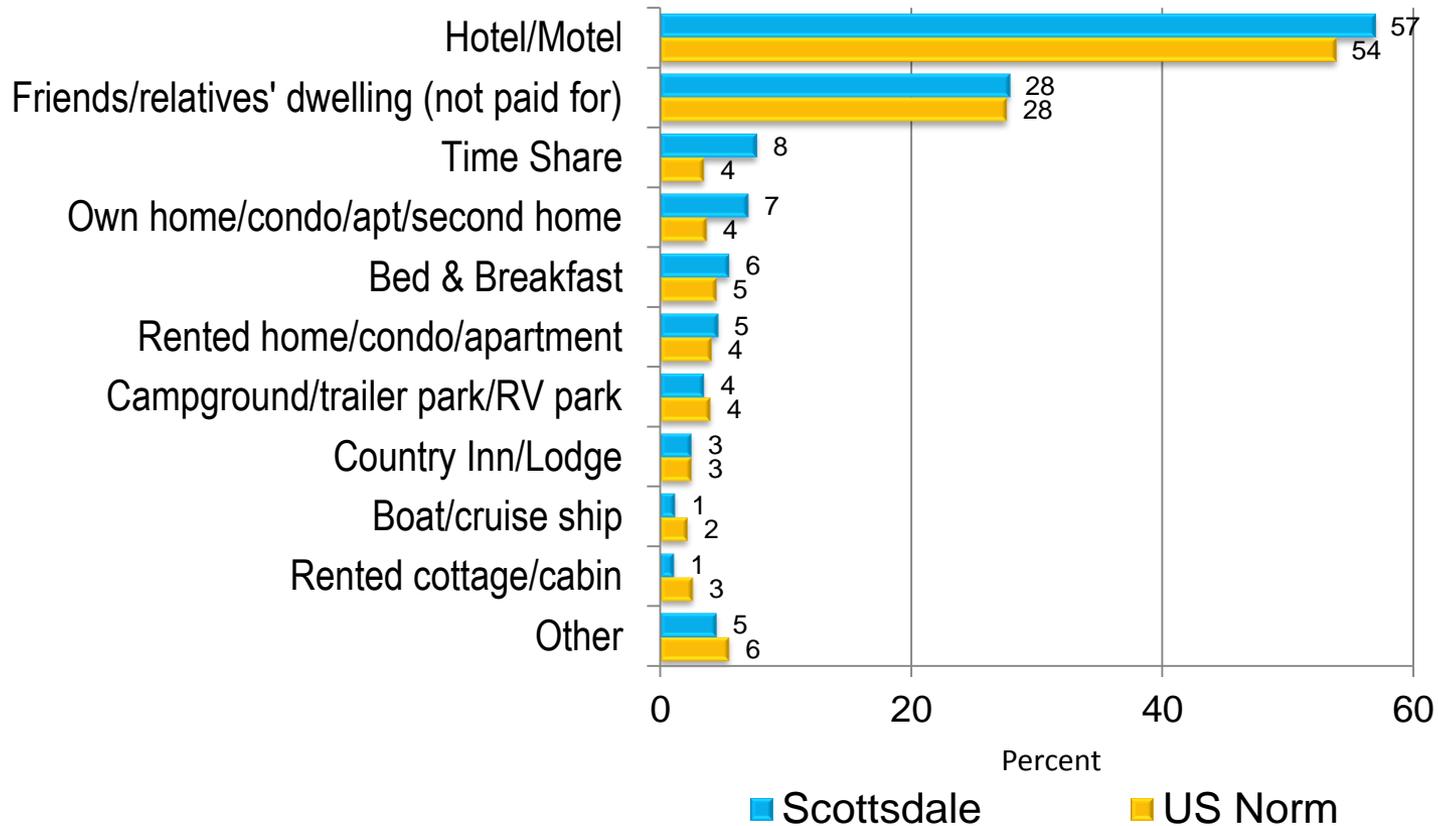
Base: Total Overnight Person-Trips



Accommodations



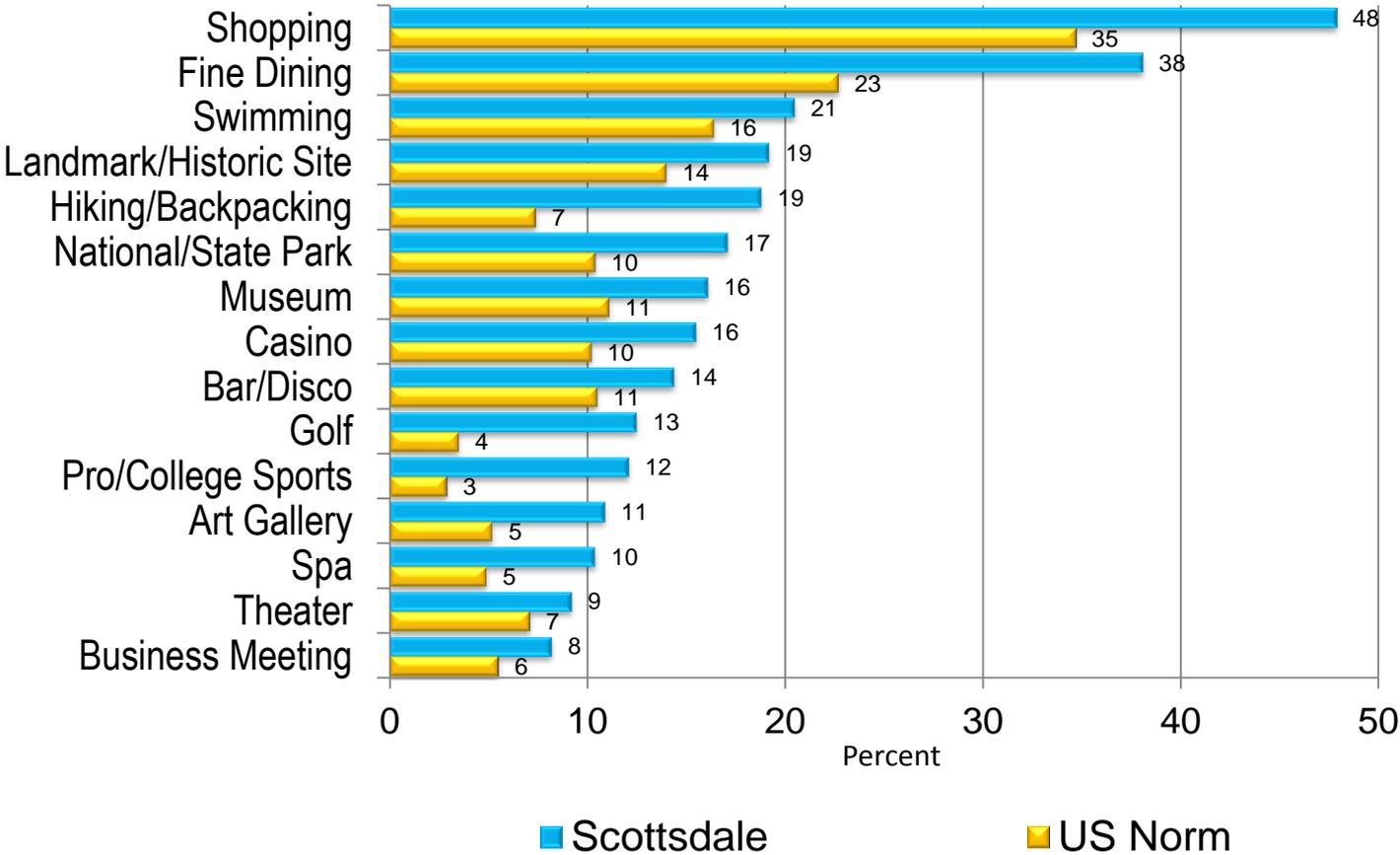
Base: Total Overnight Person-Trips



Activities and Experiences



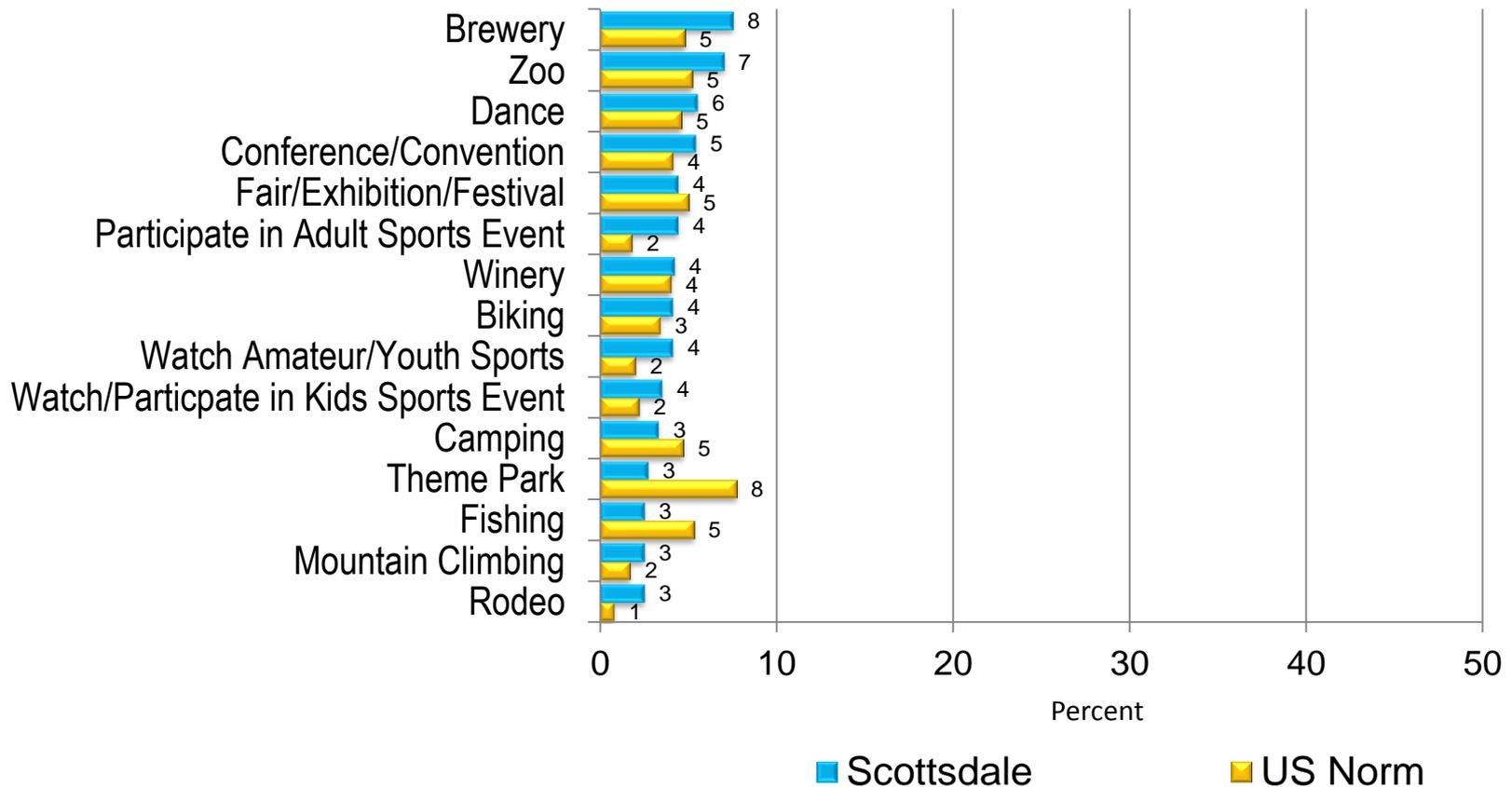
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



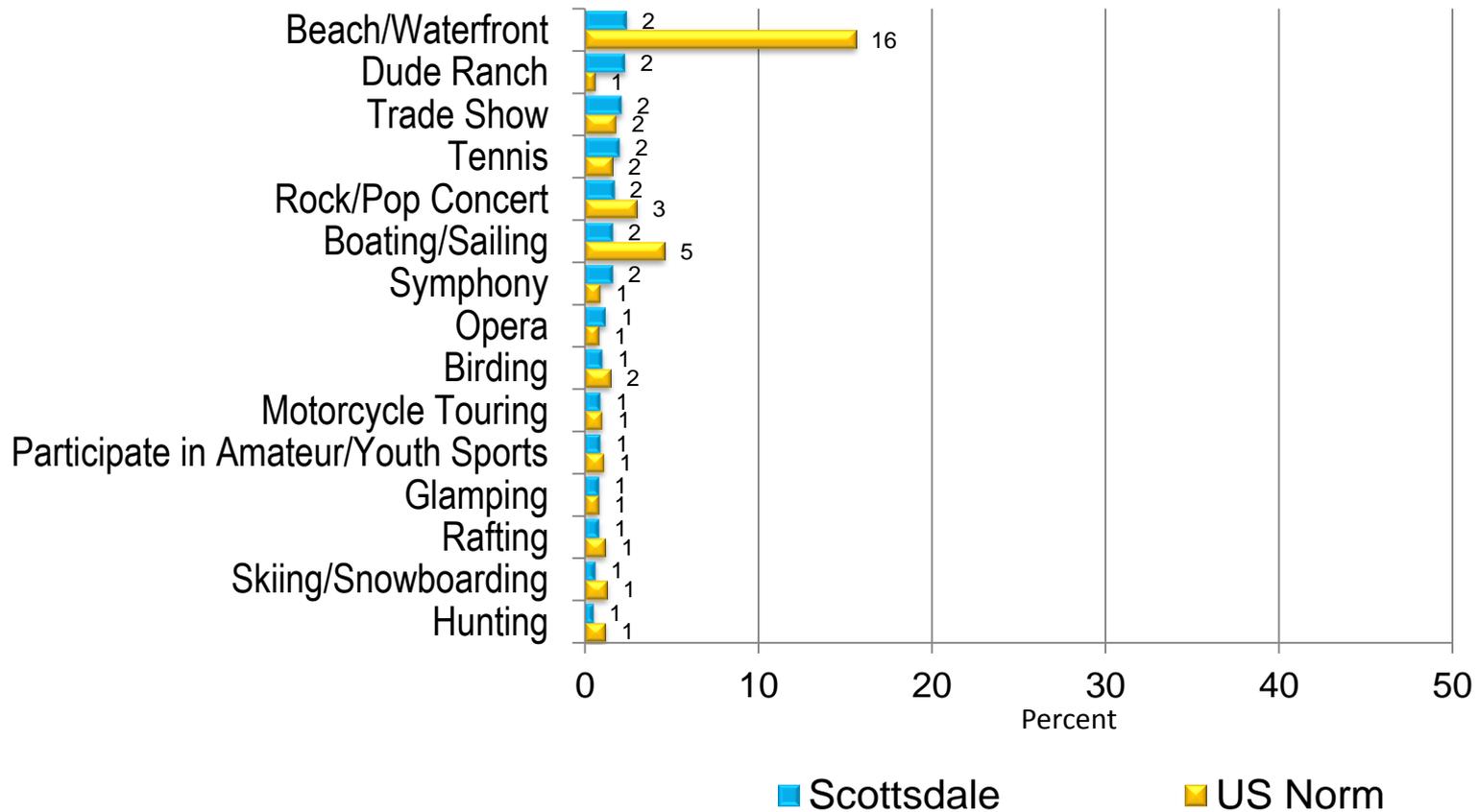
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



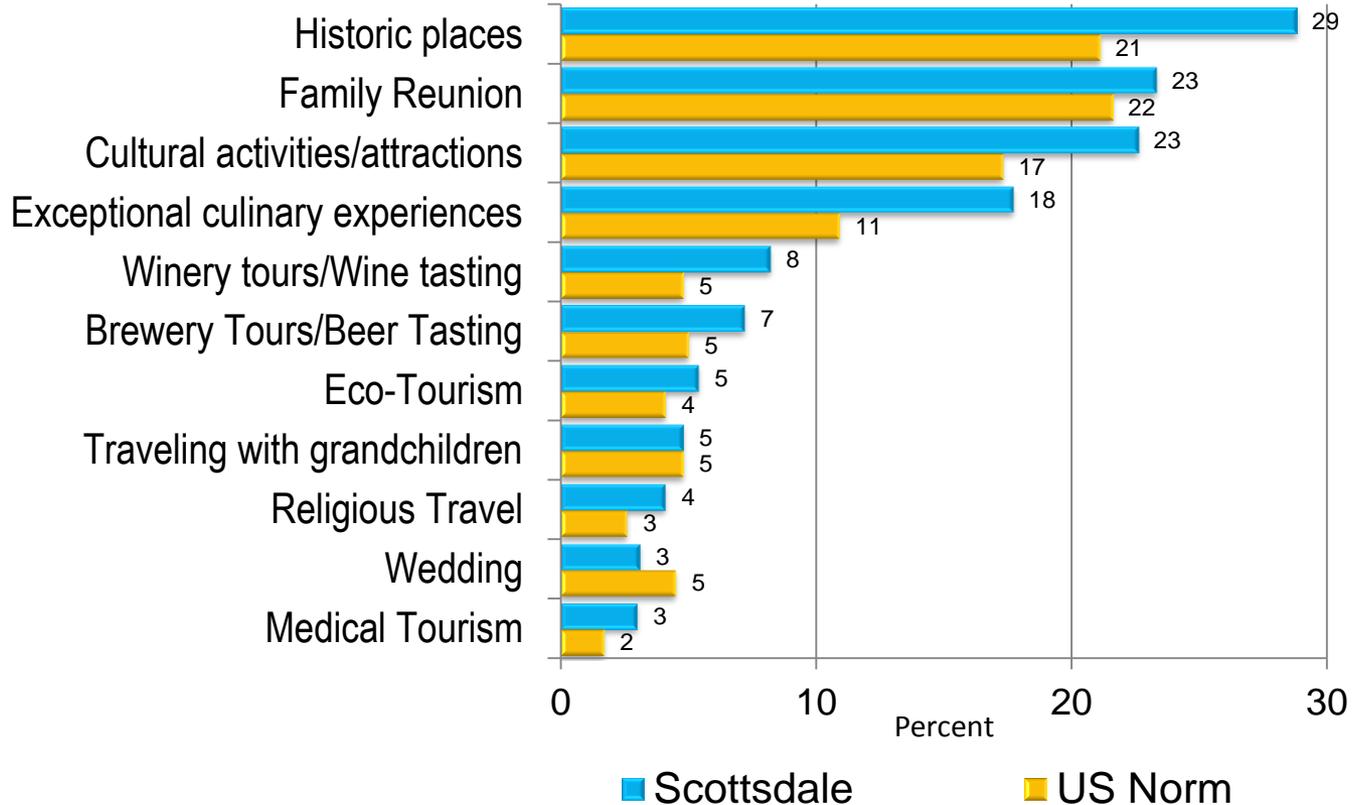
Base: Total Overnight Person-Trips



Activities of Special Interest



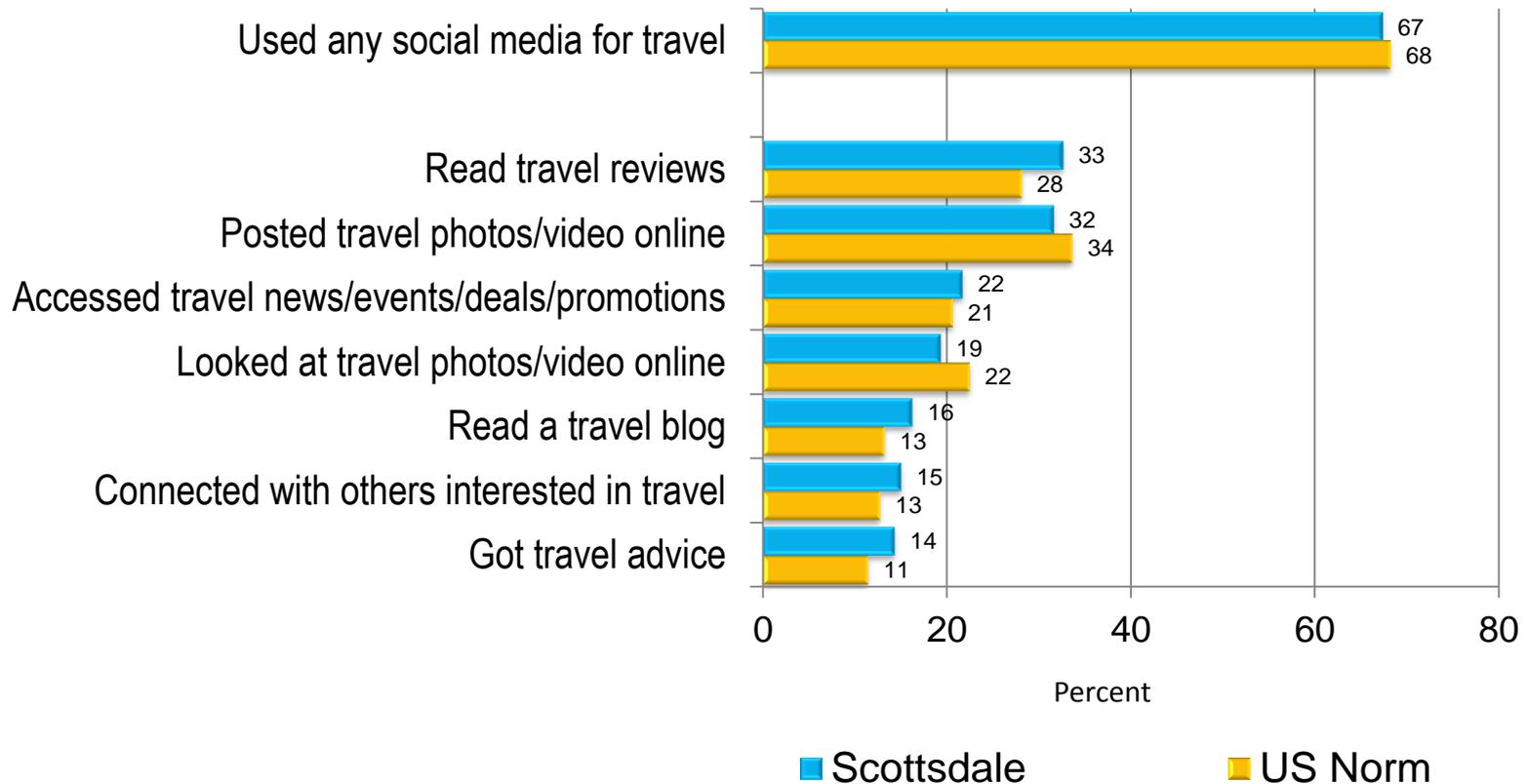
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers



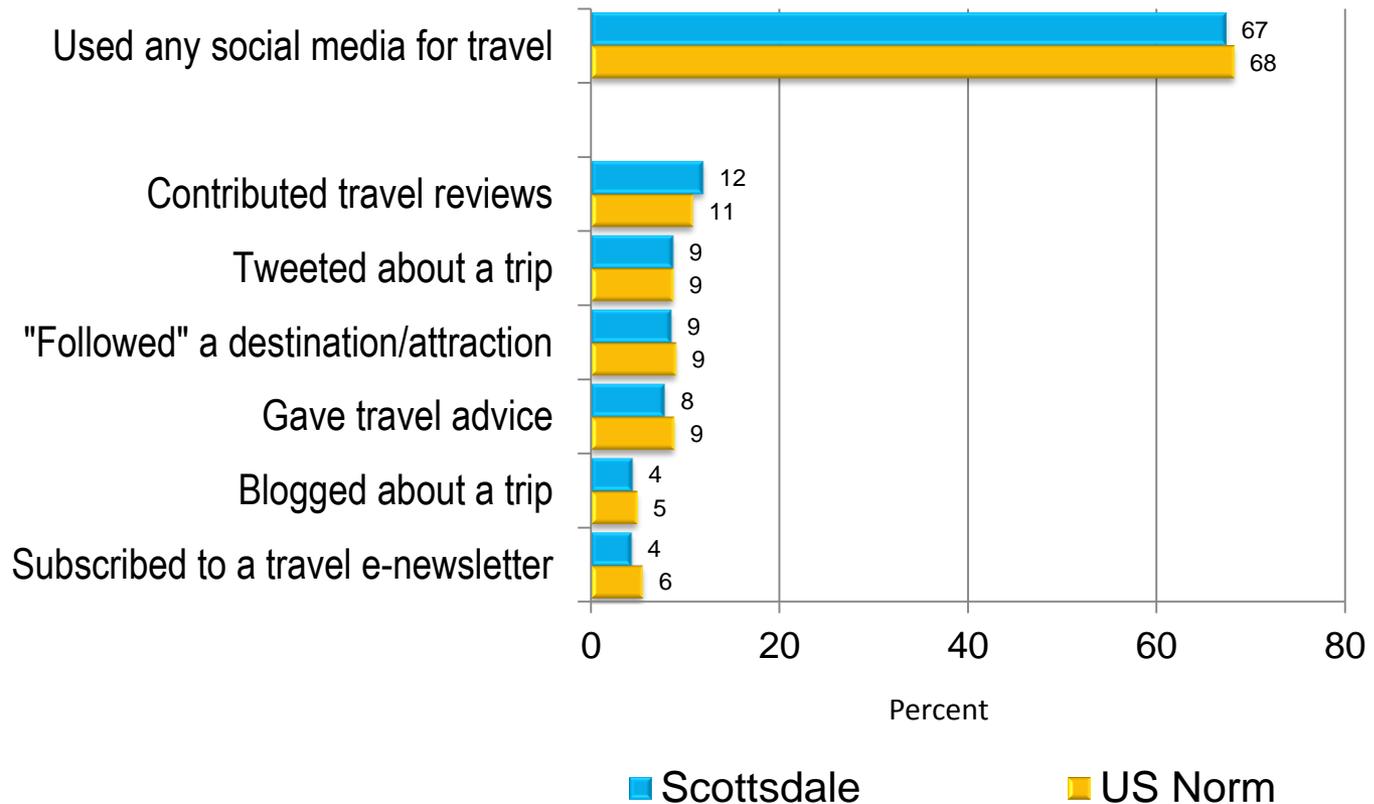
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers (Cont'd)



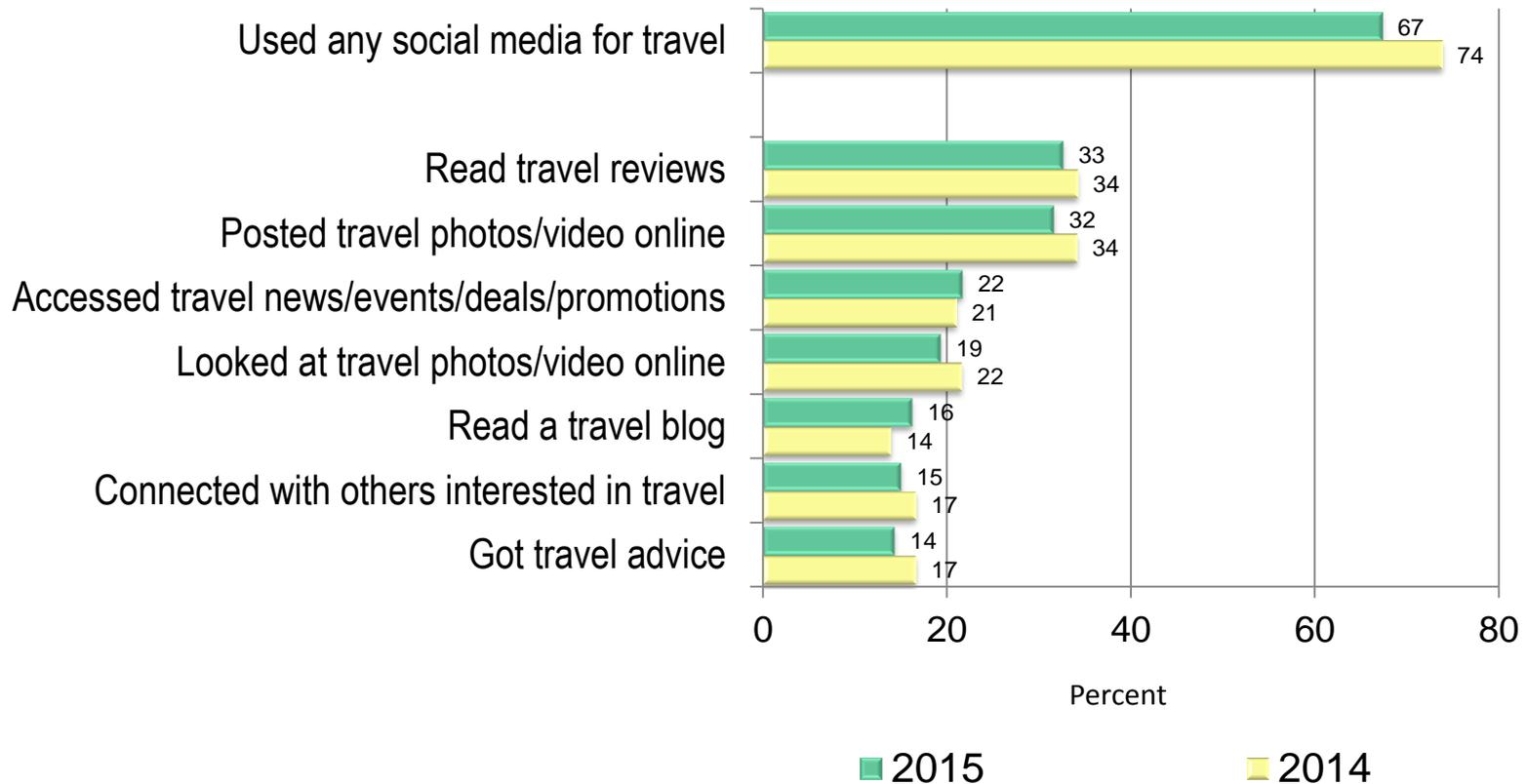
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers 2015 vs. 2014



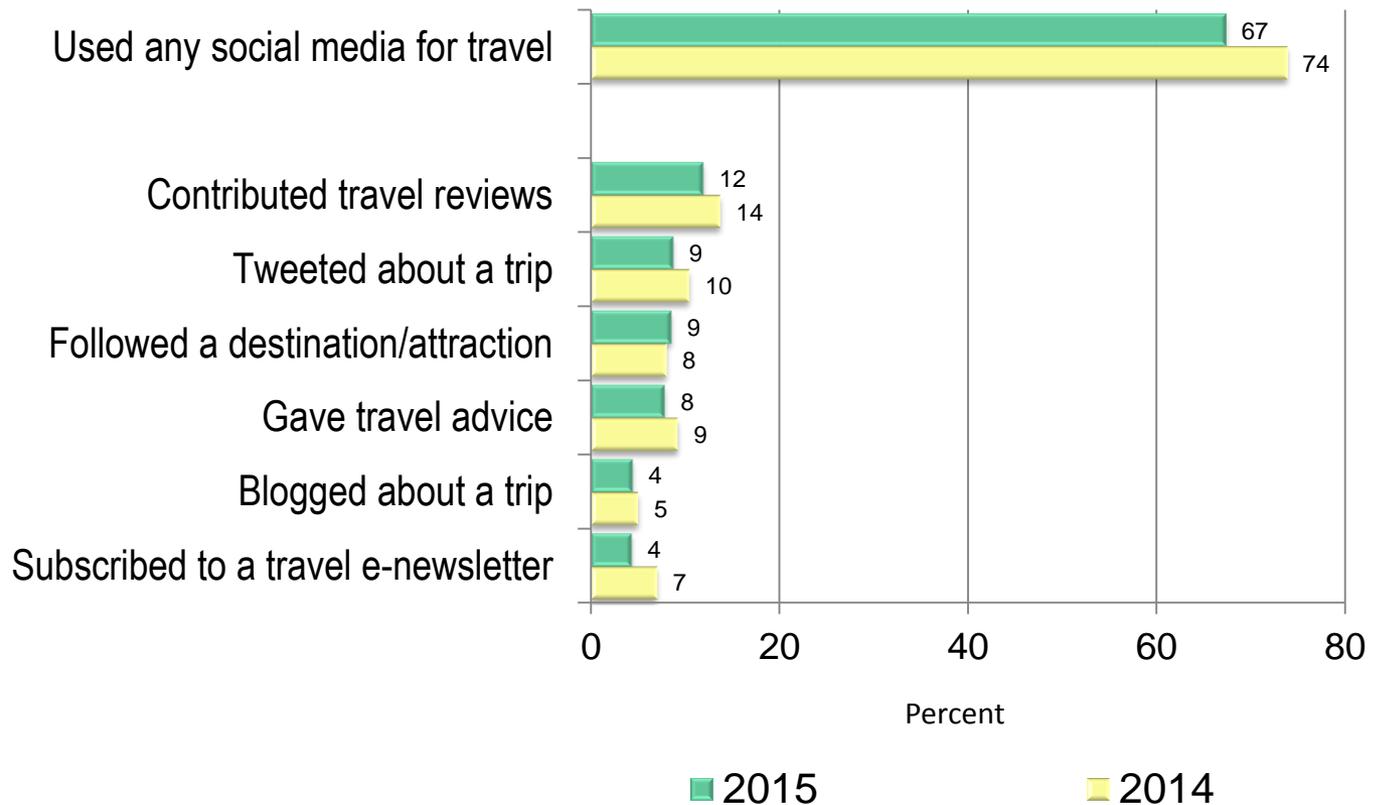
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers 2015 vs. 2014 (Cont'd)



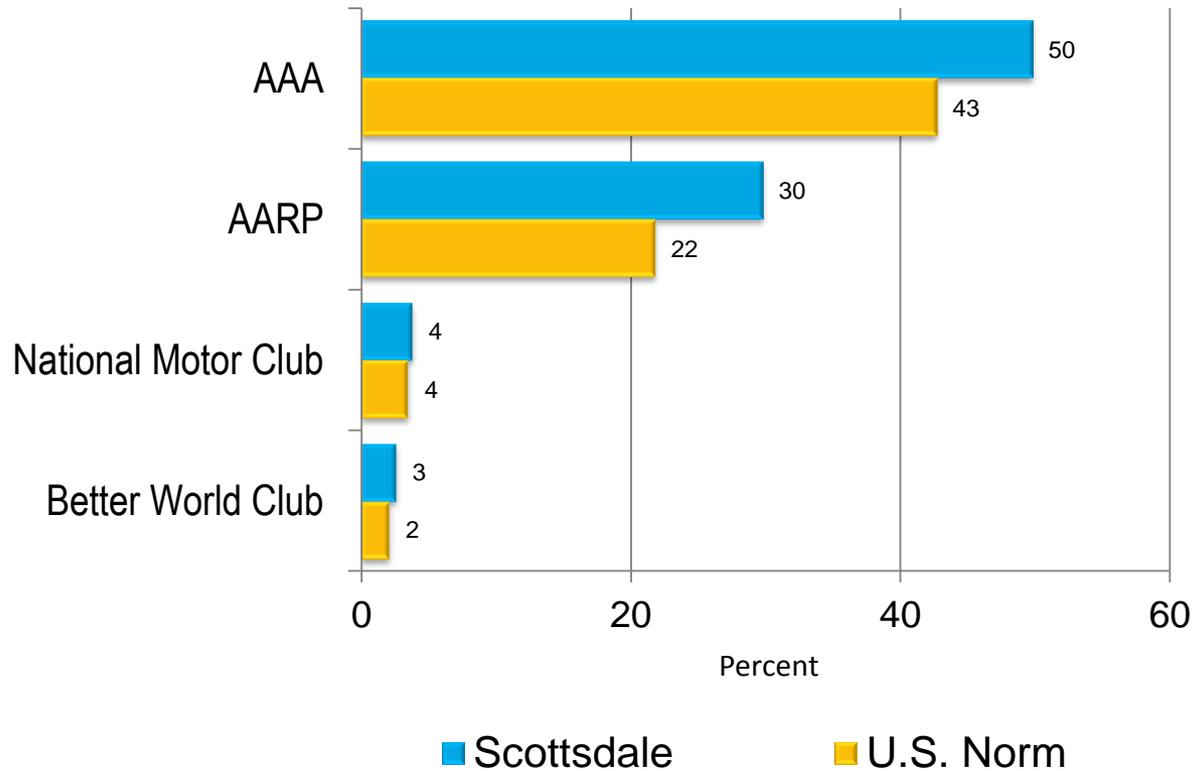
Base: Total Overnight Person-Trips



Organization Membership



Base: Total Overnight Person-Trips



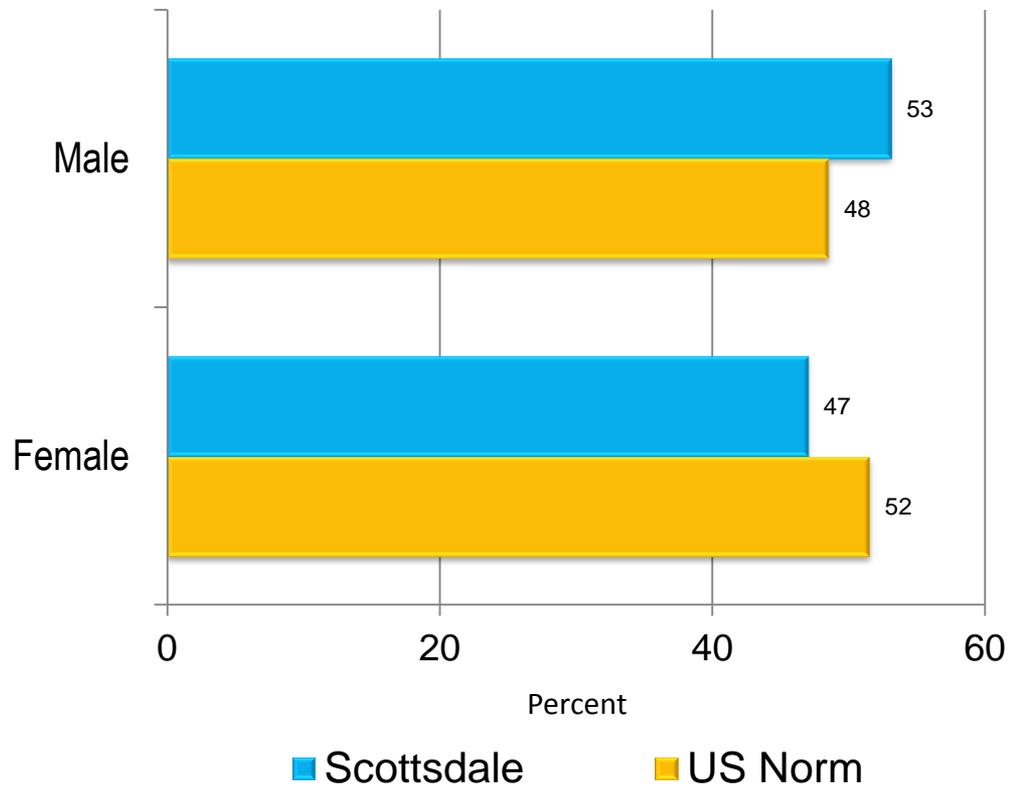


Demographic Profile of Overnight Visitors to Scottsdale

Gender



Base: Total Overnight Person-Trips



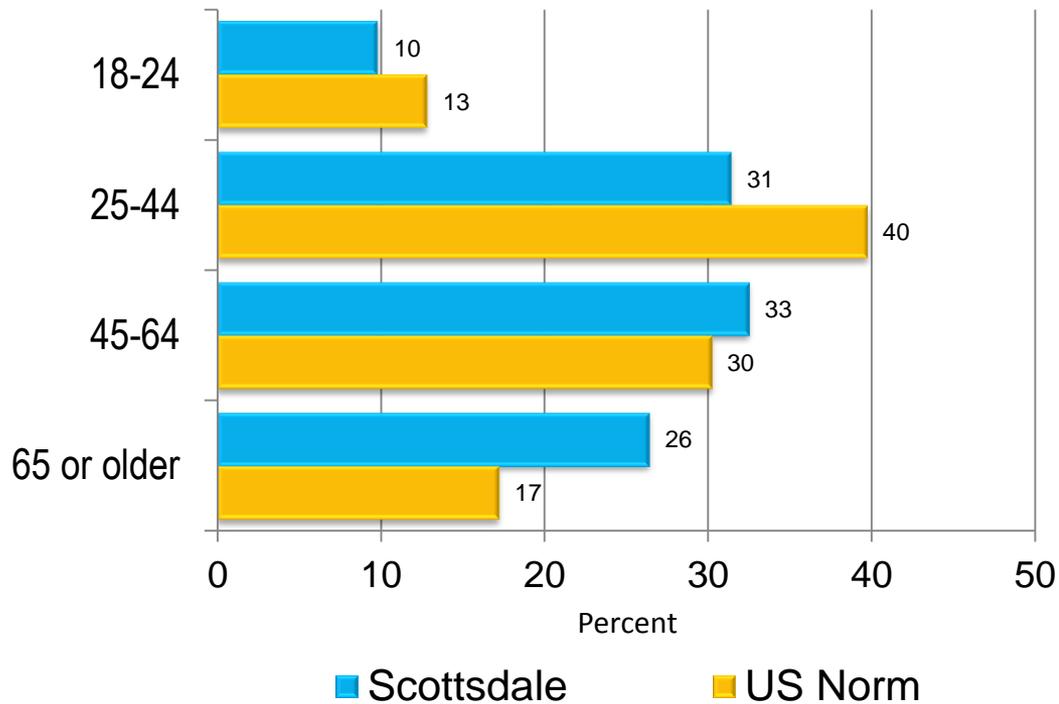
Age



Base: Total Overnight Person-Trips

Scottsdale Average = 49

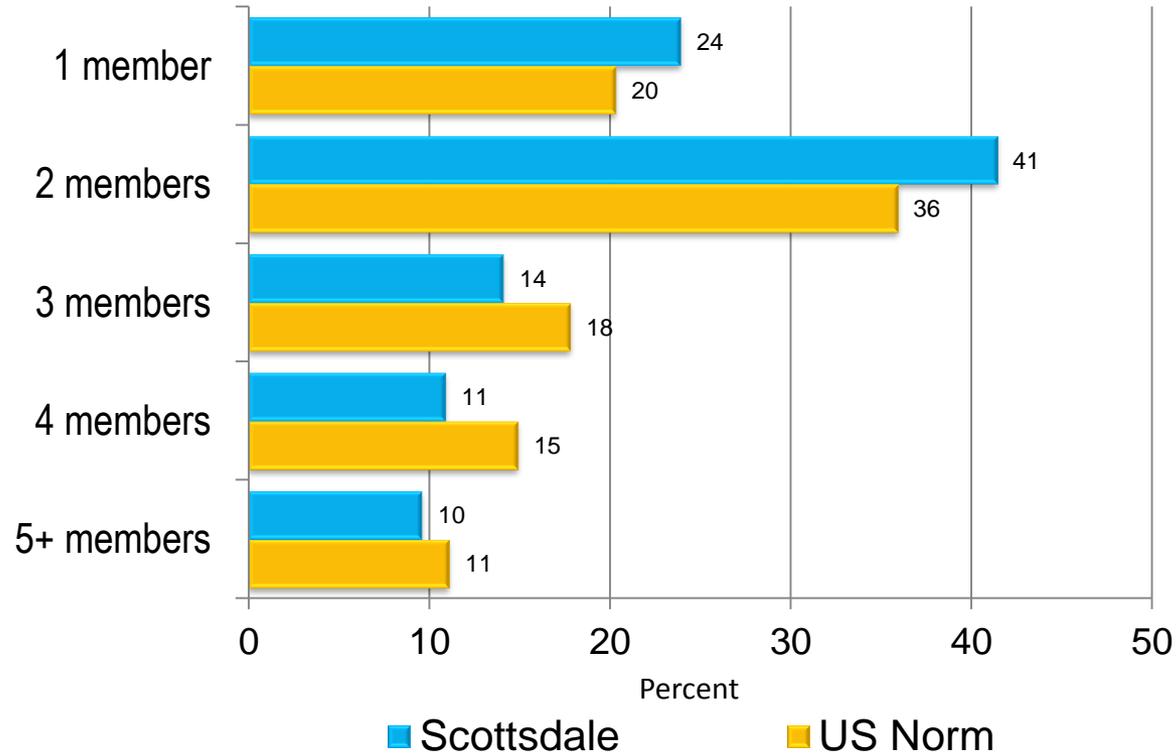
US Average = 45



Household Size



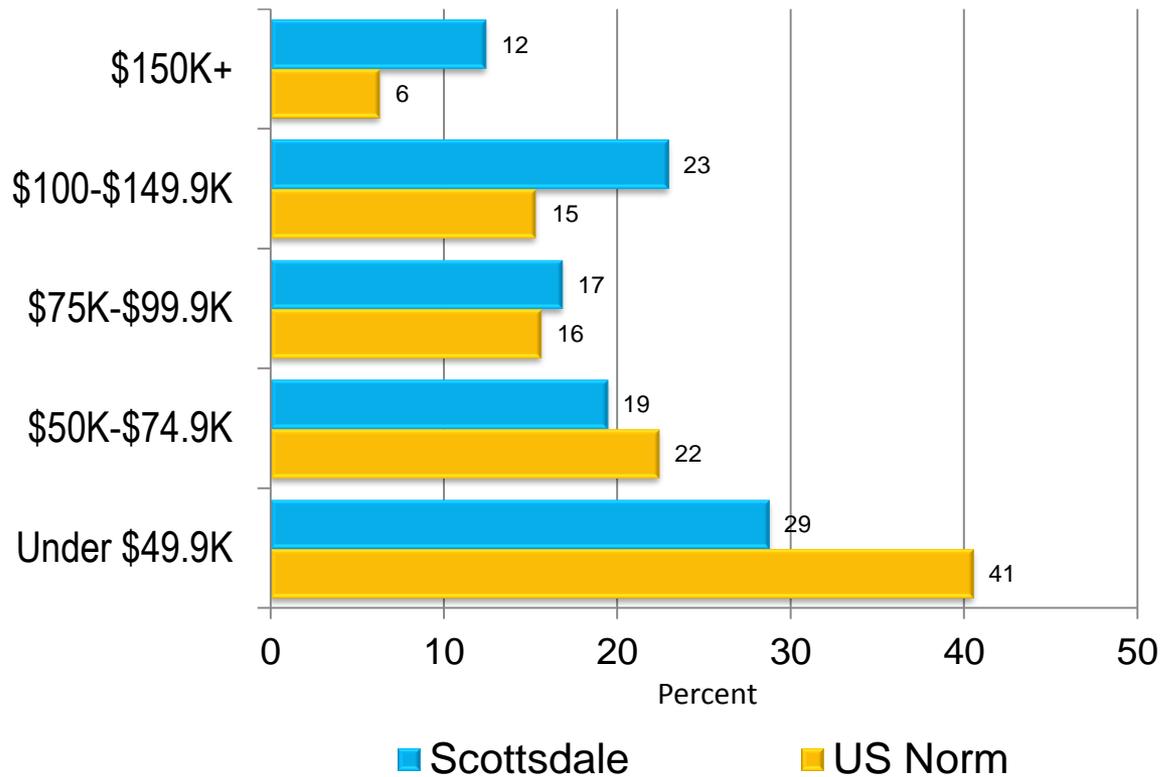
Base: Total Overnight Person-Trips



Household Income



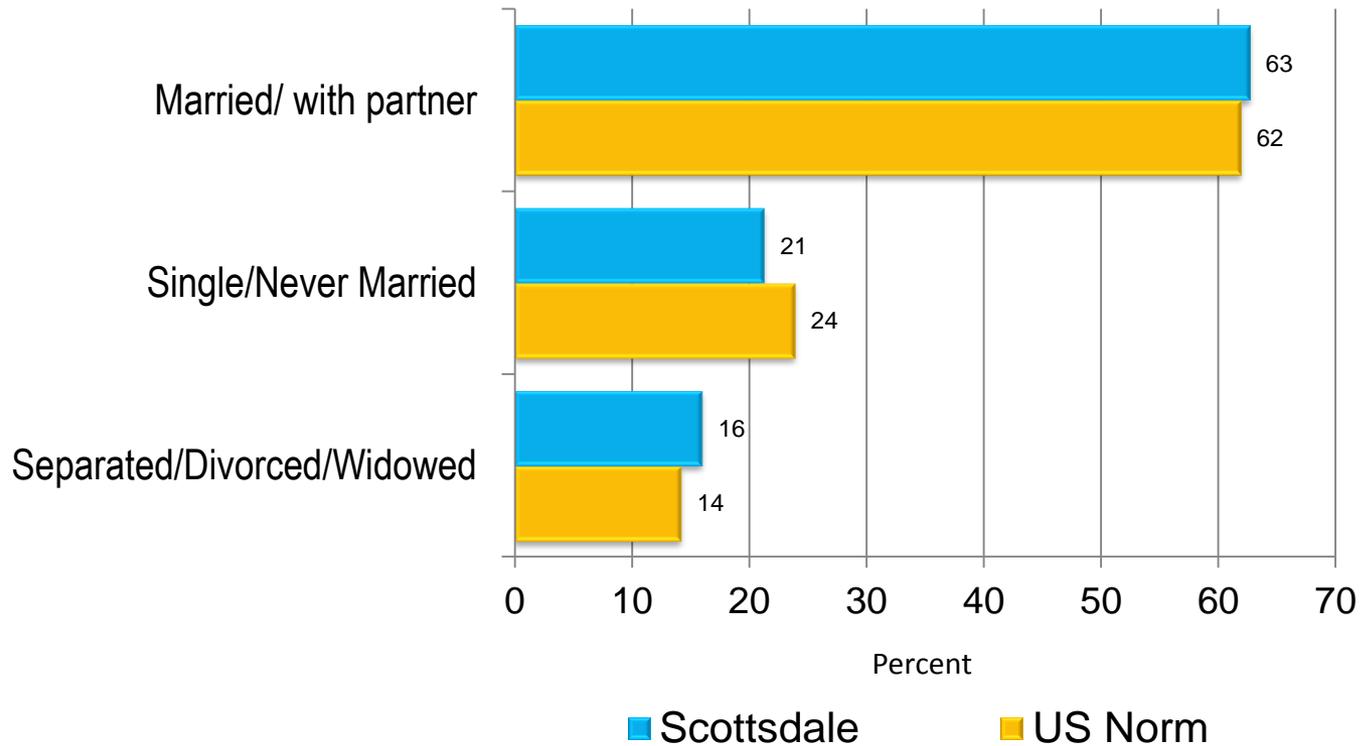
Base: Total Overnight Person-Trips



Marital Status



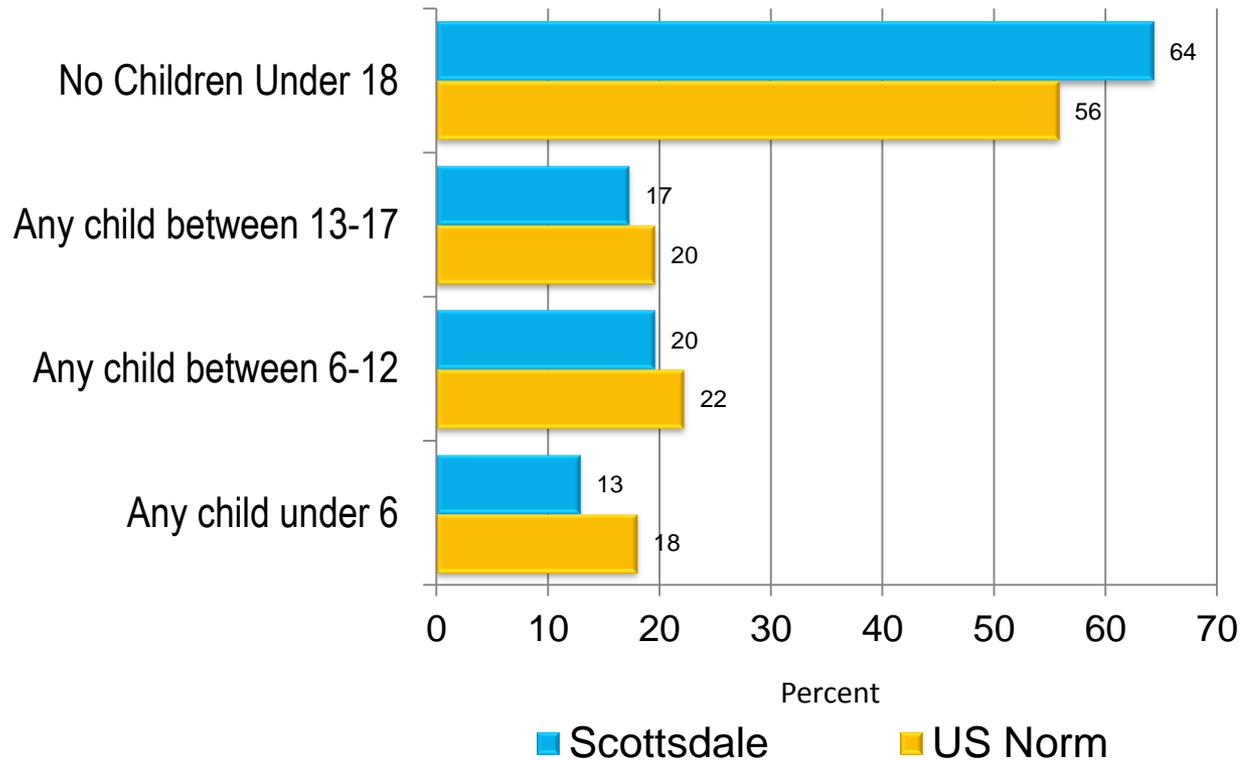
Base: Total Overnight Person-Trips



Children in Household



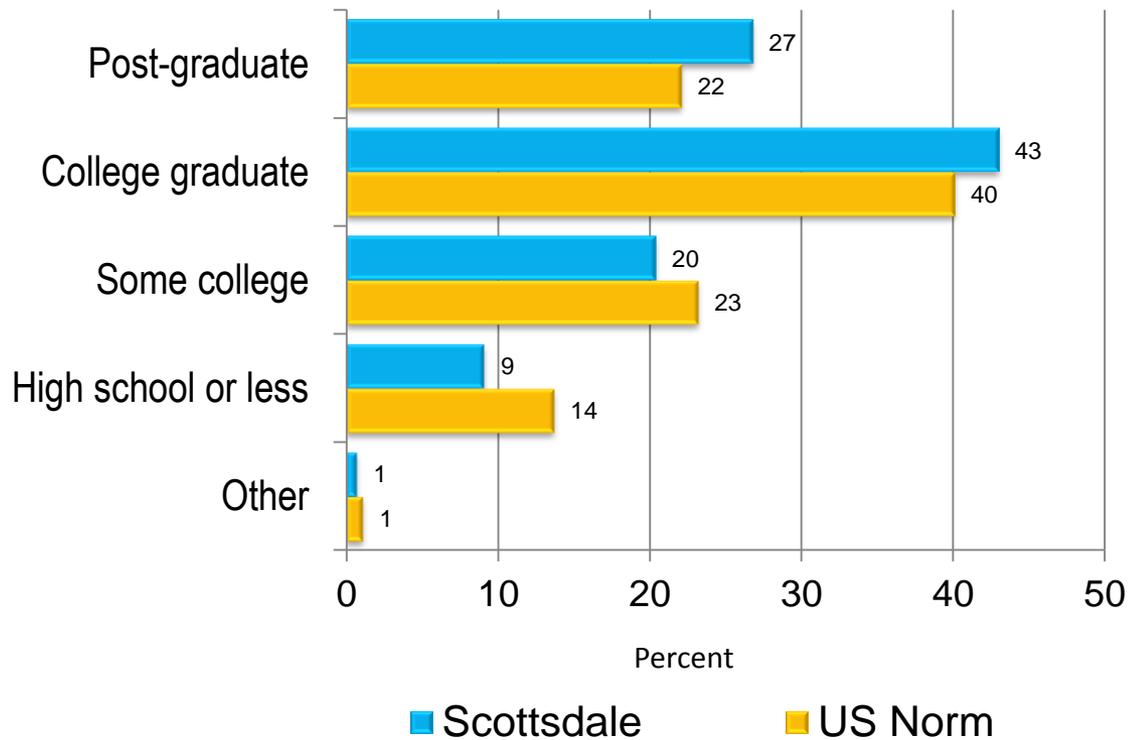
Base: Total Overnight Person-Trips



Education



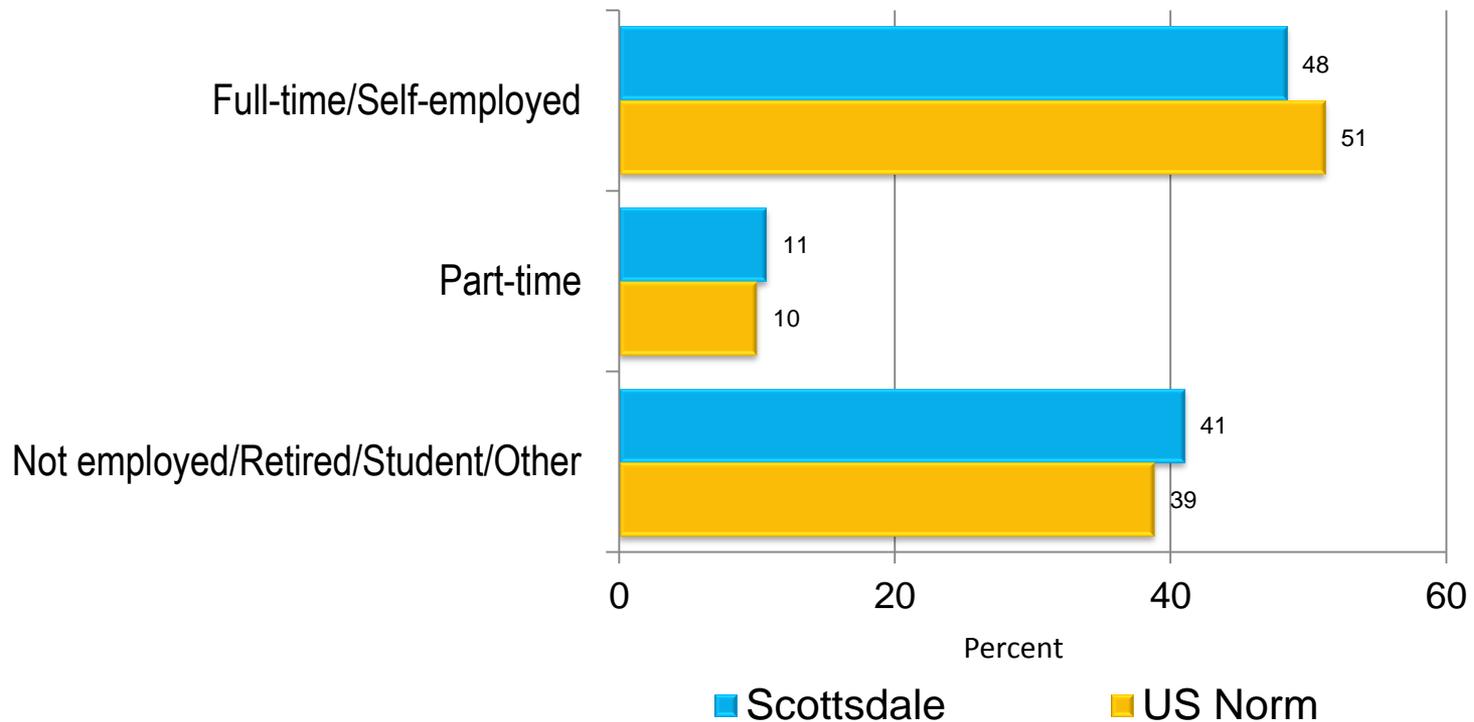
Base: Total Overnight Person-Trips



Employment



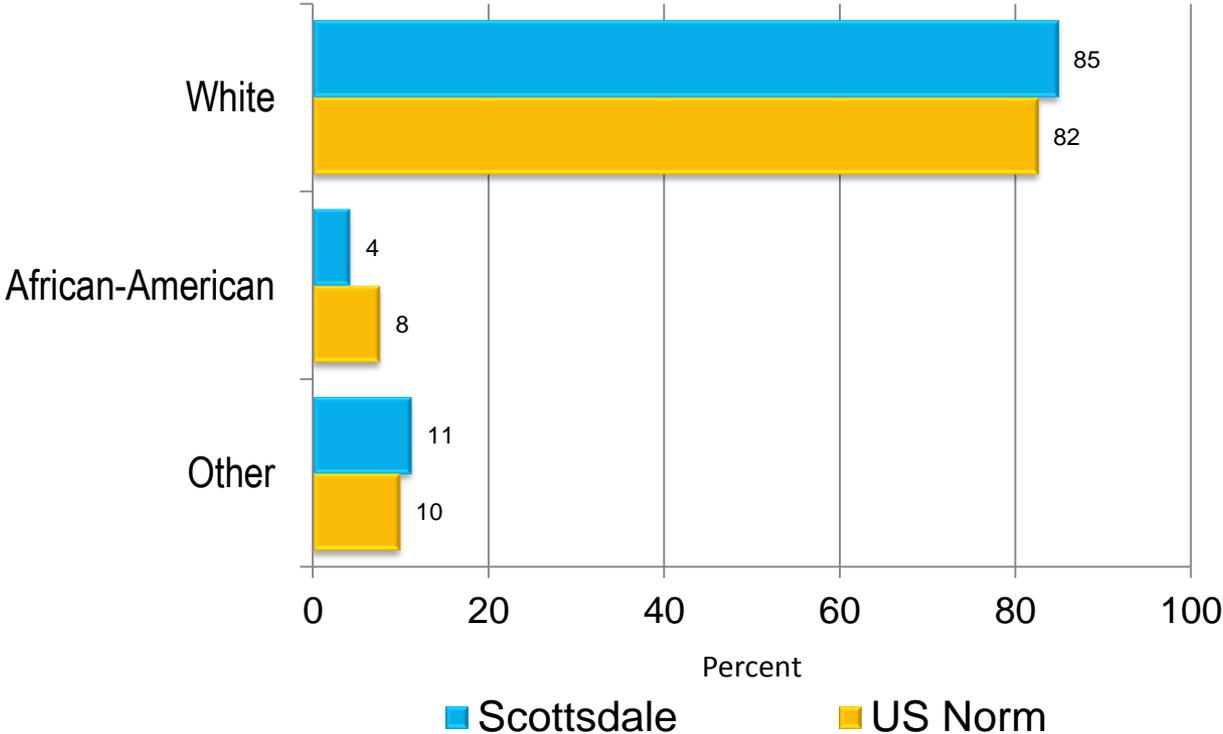
Base: Total Overnight Person-Trips



Race



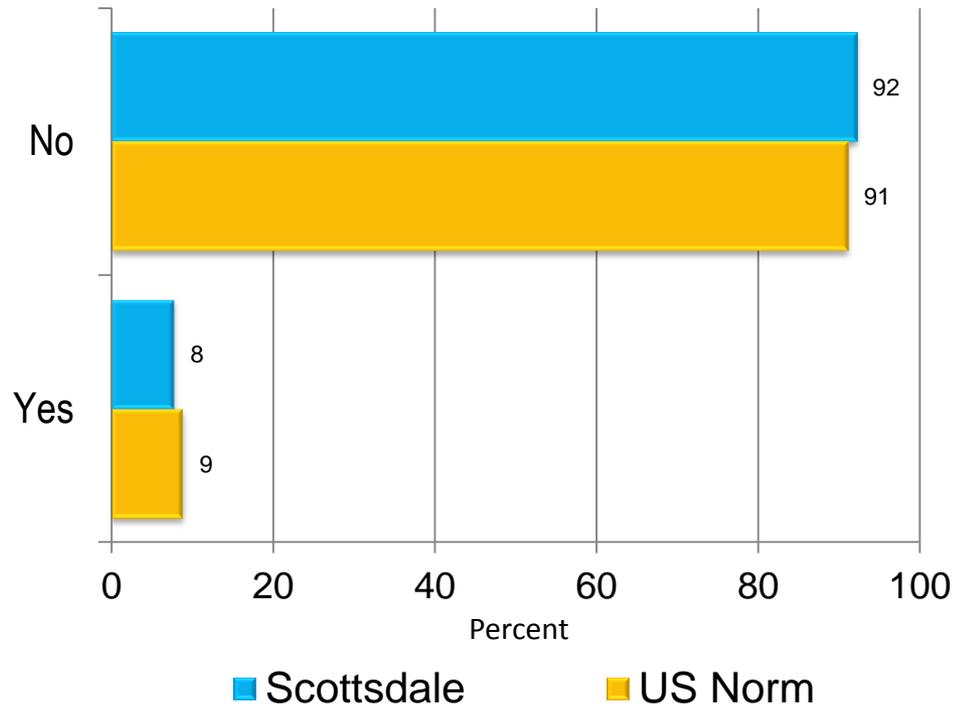
Base: Total Overnight Person-Trips



Hispanic Background



Base: Total Overnight Person-Trips





Day Trip Detail



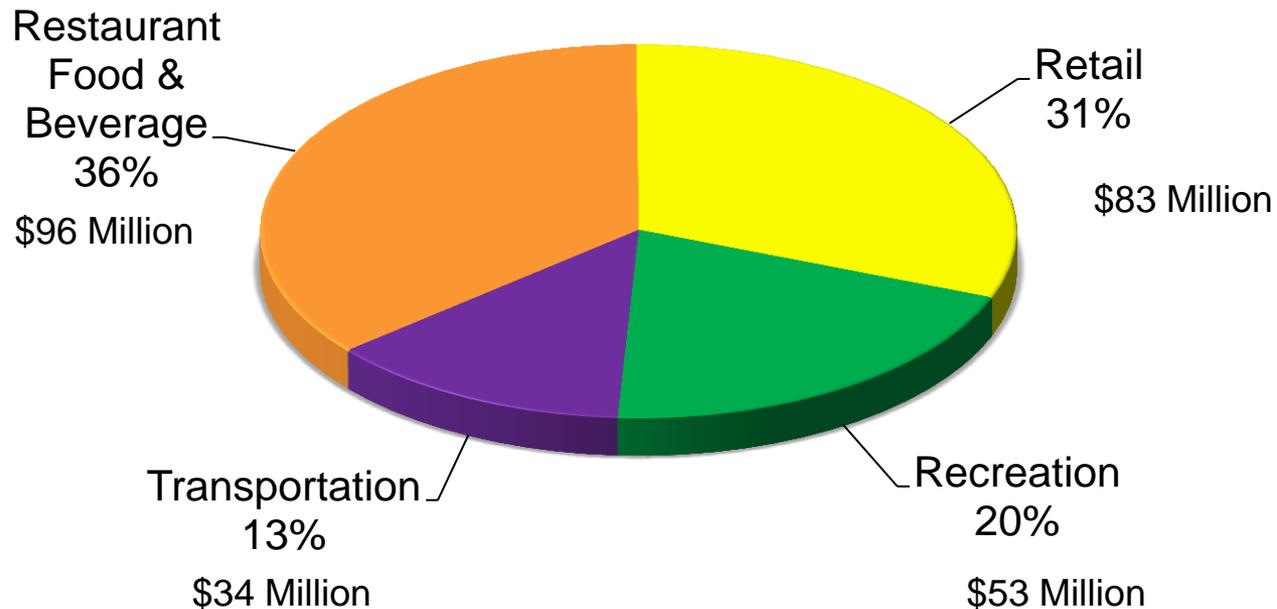
Day Trip Expenditures

Total Day Trip Spending – by Sector

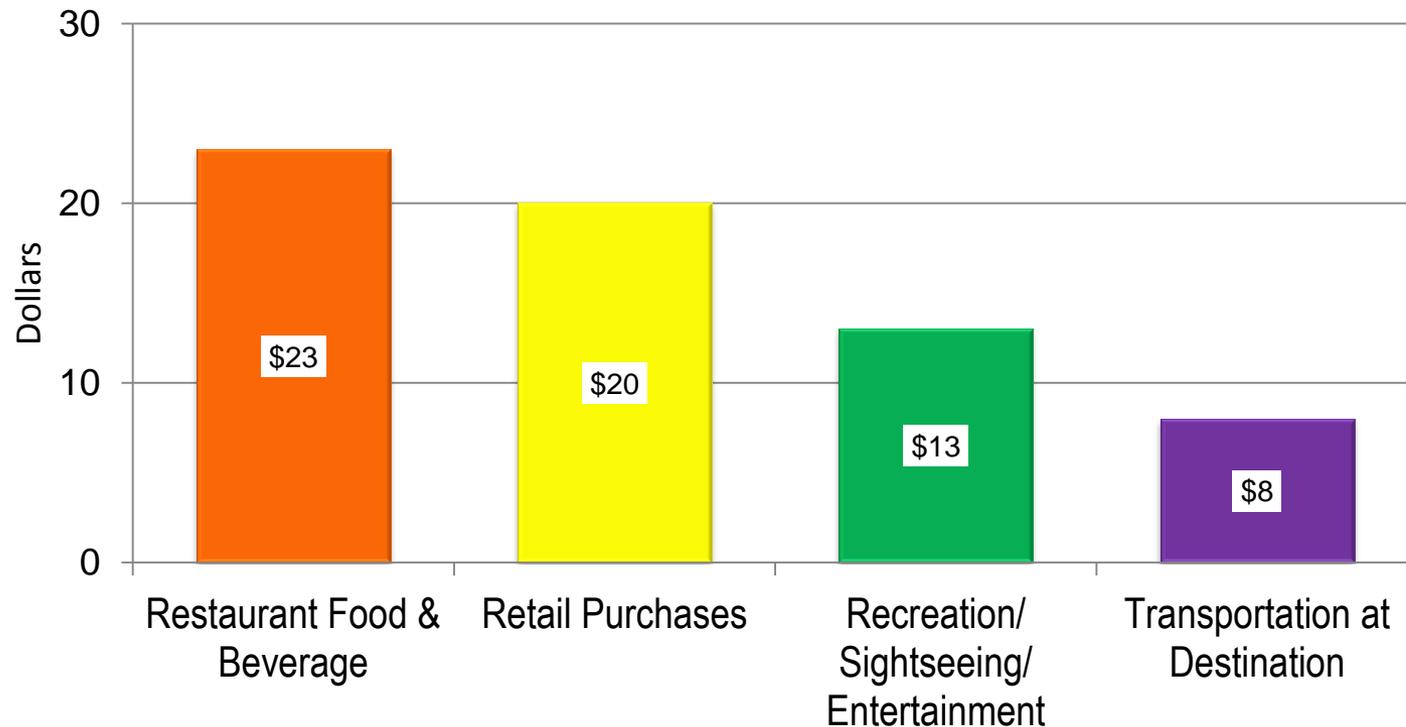


Total Spending = \$266 Million

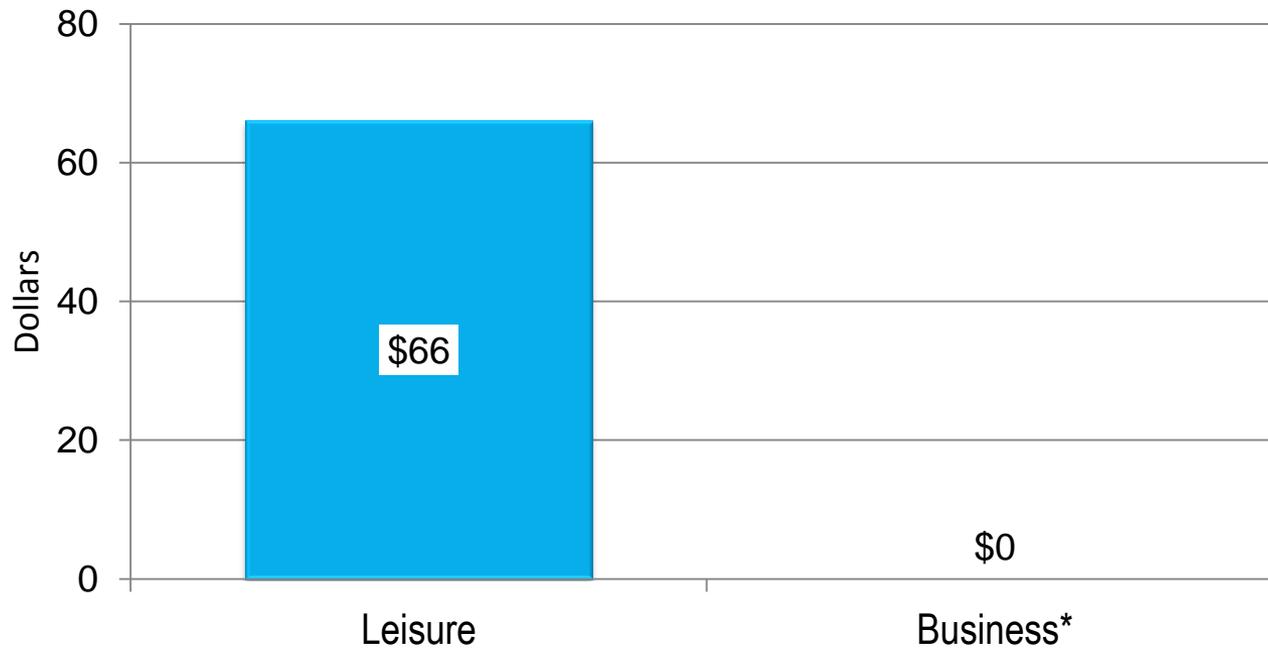
+3.9% vs. 2014



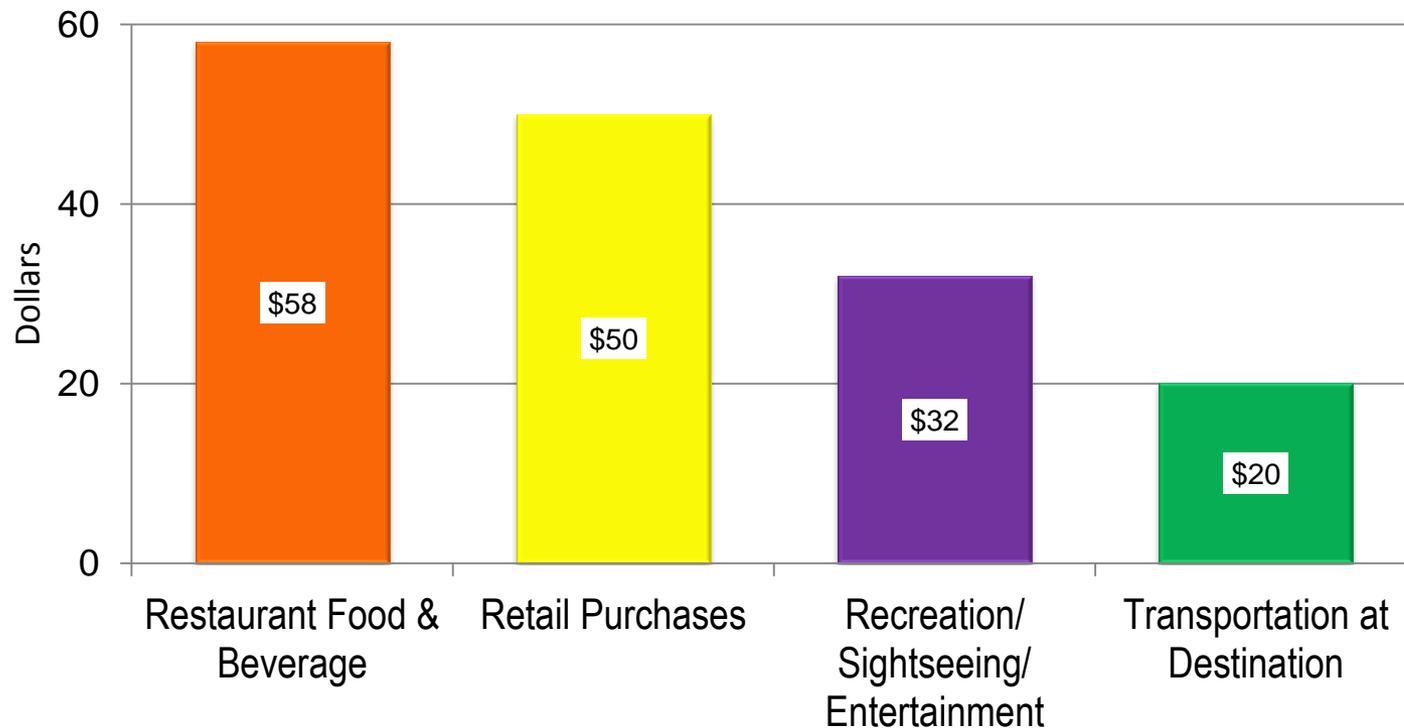
Average Per Person Expenditures on Day Trip – By Sector



Average Per Person Expenditures on Day Trip – by Trip Purpose



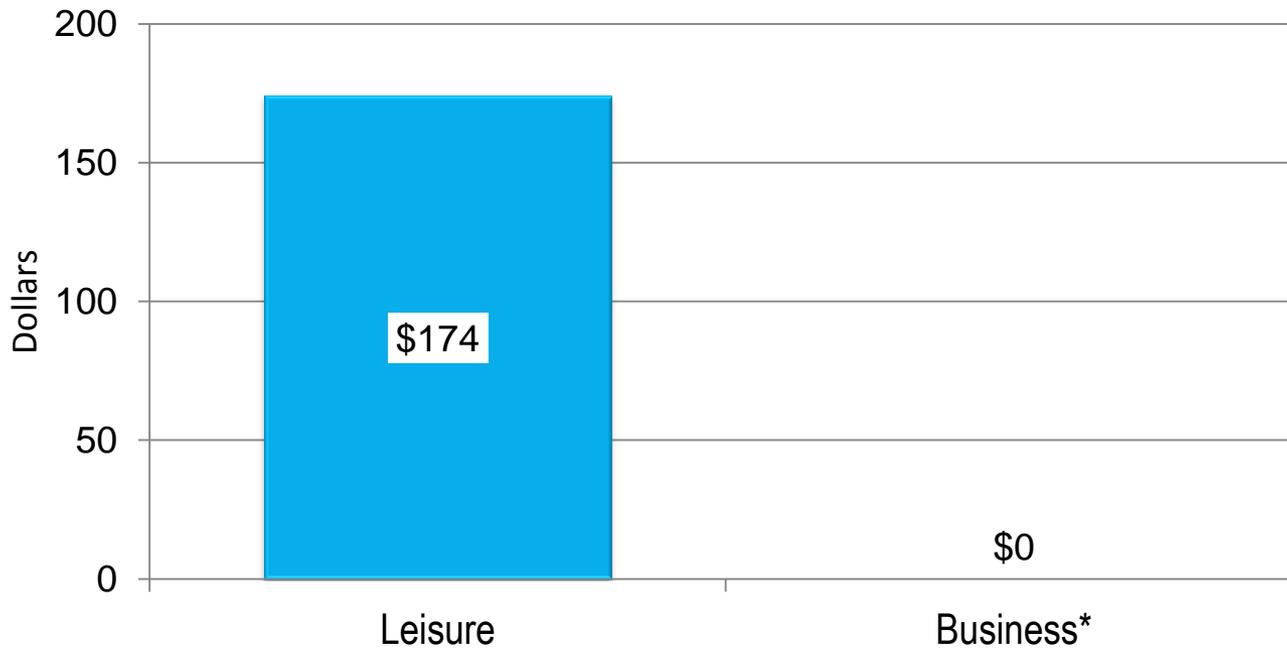
Average Per Party Expenditures on Day Trip – By Sector



Average Per Party Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips



*Low Business Base



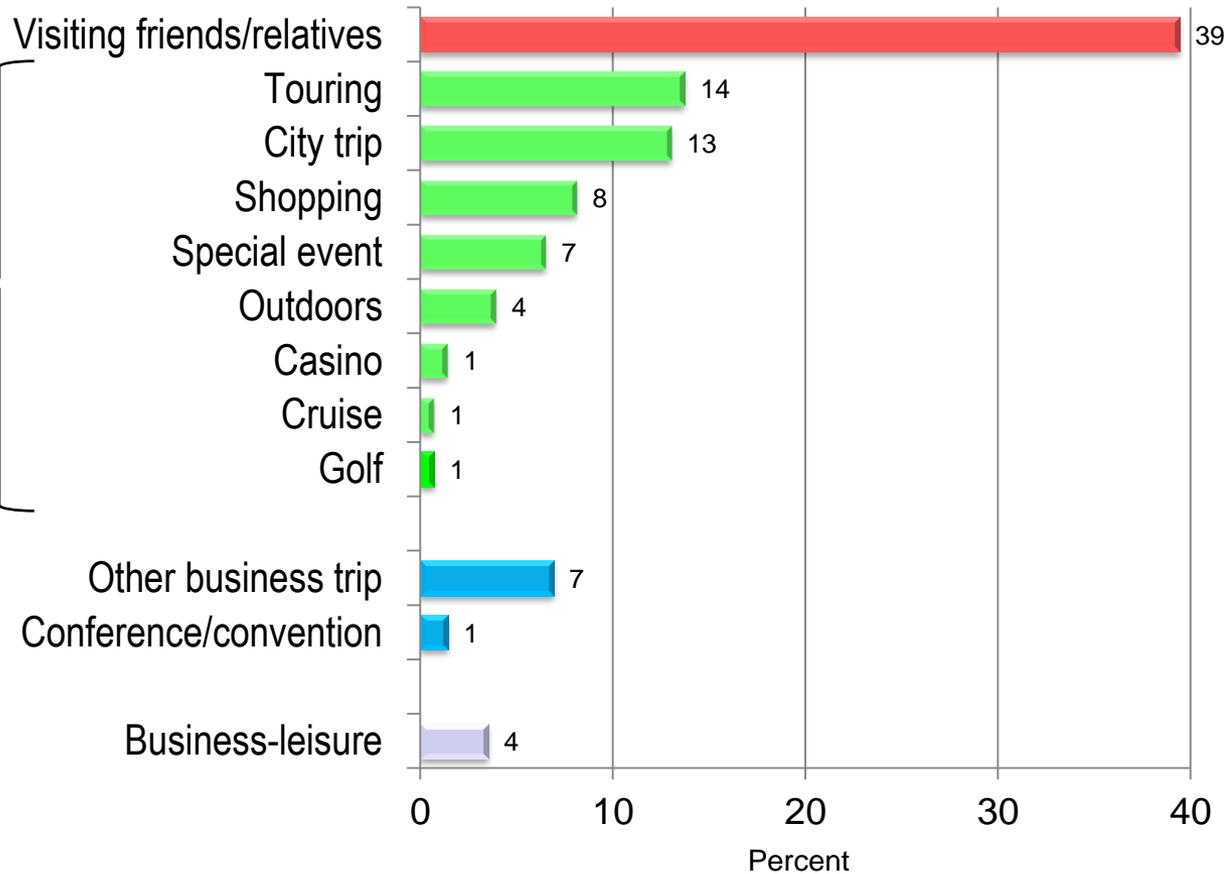
Day Trip Characteristics

Main Purpose of Trip



Base: Total Day Person-Trips

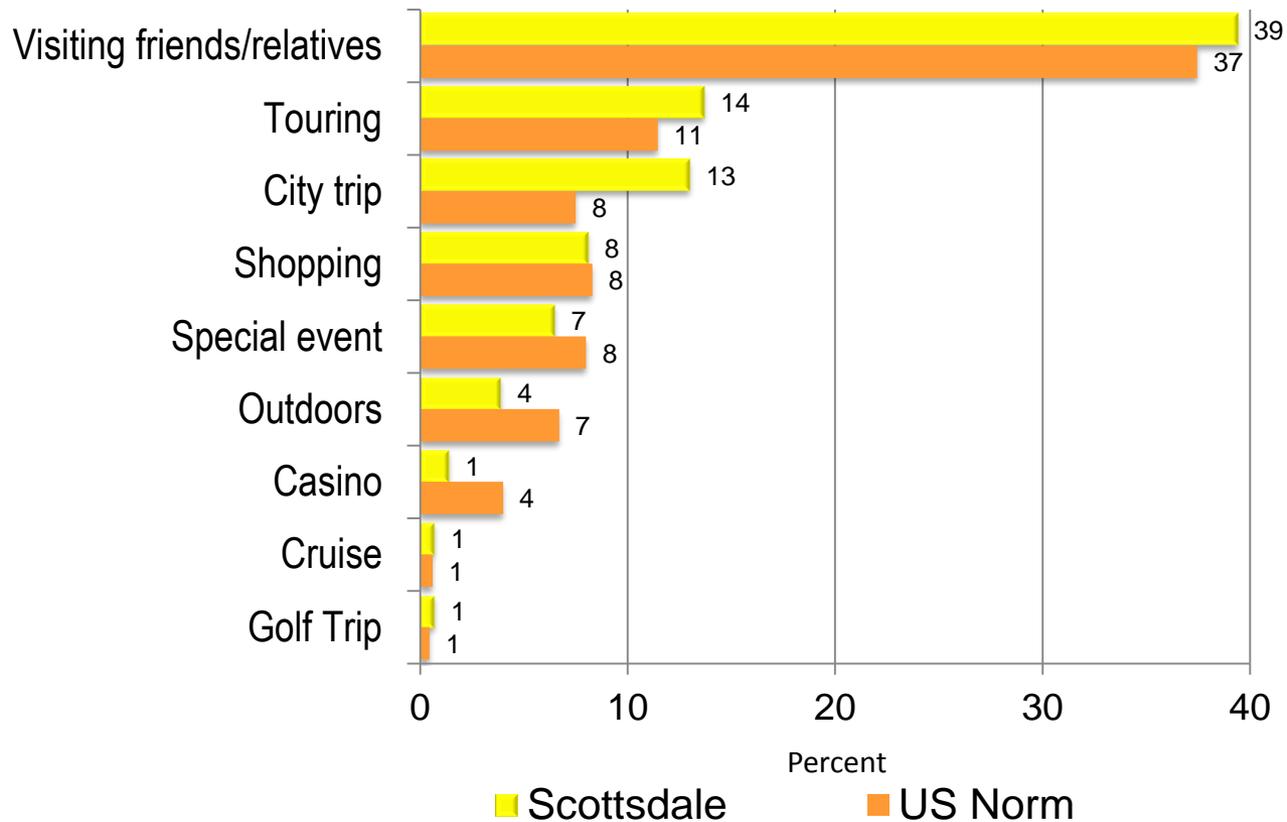
**Marketable
Trips
49%**



Main Purpose of Day Leisure Trip — Scottsdale vs. National Norm



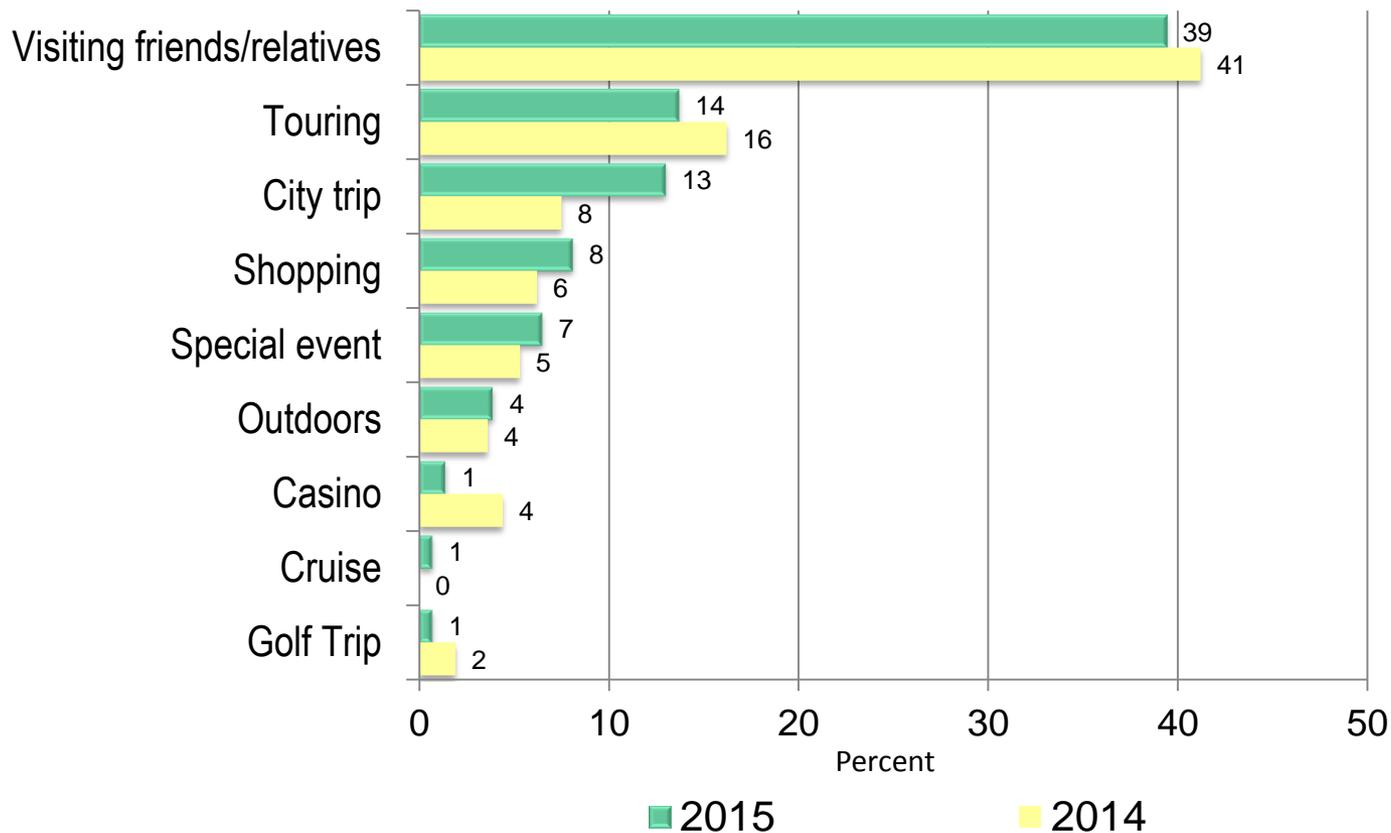
Base: Total Day Person-Trips



Main Purpose of Day Leisure Trip to Scottsdale – 2015 vs. 2014



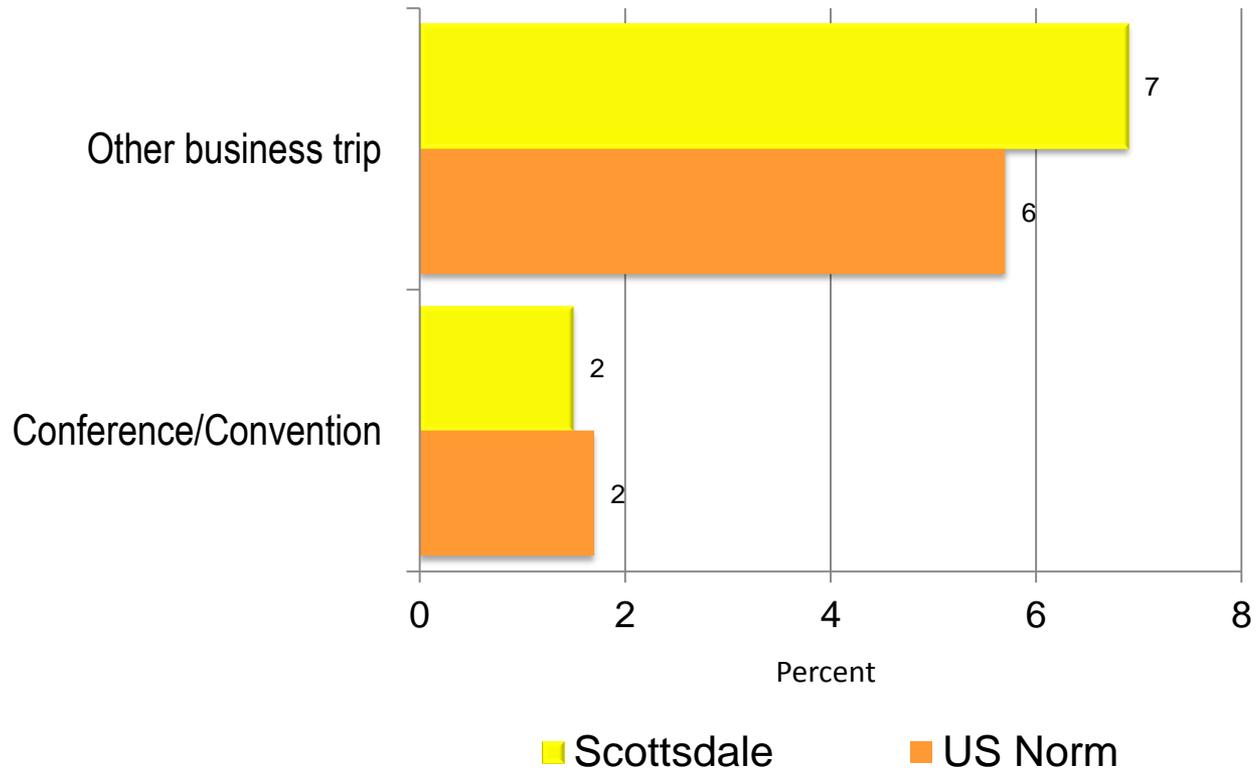
Base: Total Day Person-Trips



Main Purpose of Day Business Trip — Scottsdale vs. National Norm



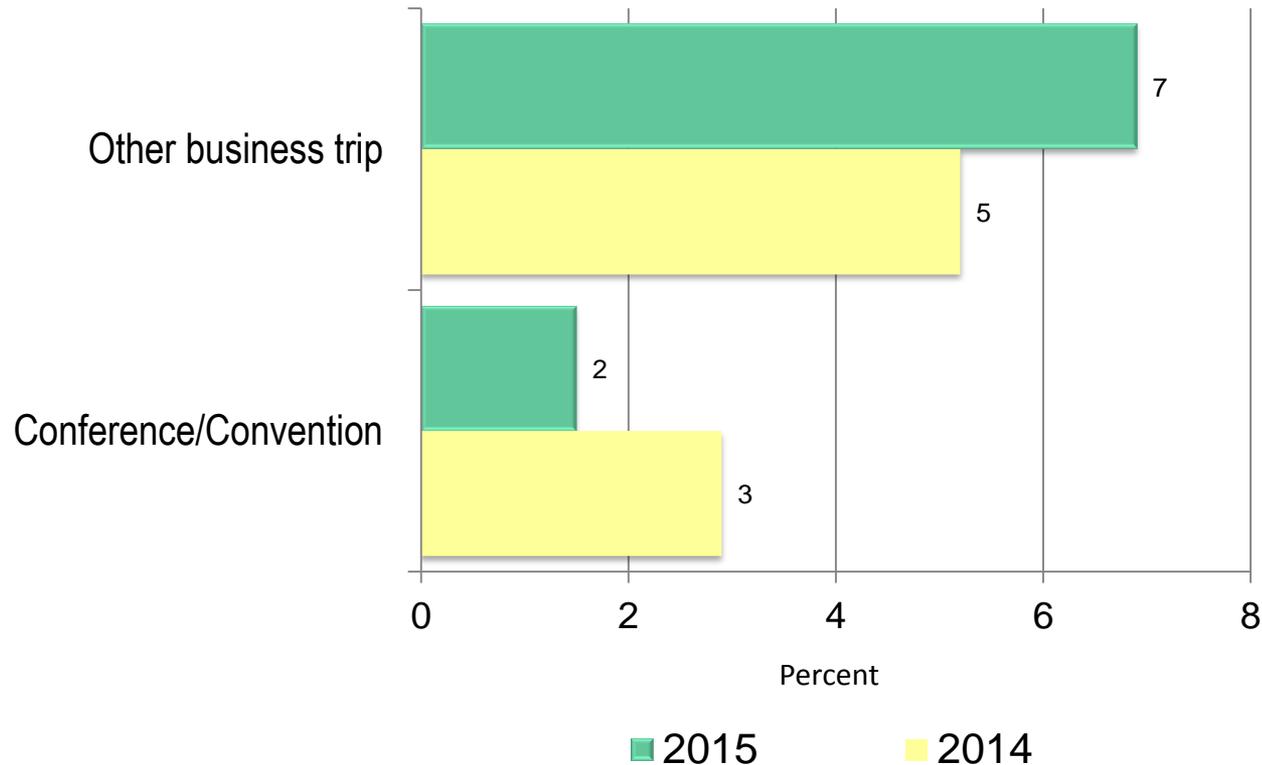
Base: Total Day Person-Trips



Main Purpose of Day Business Trip to Scottsdale – 2015 vs. 2014



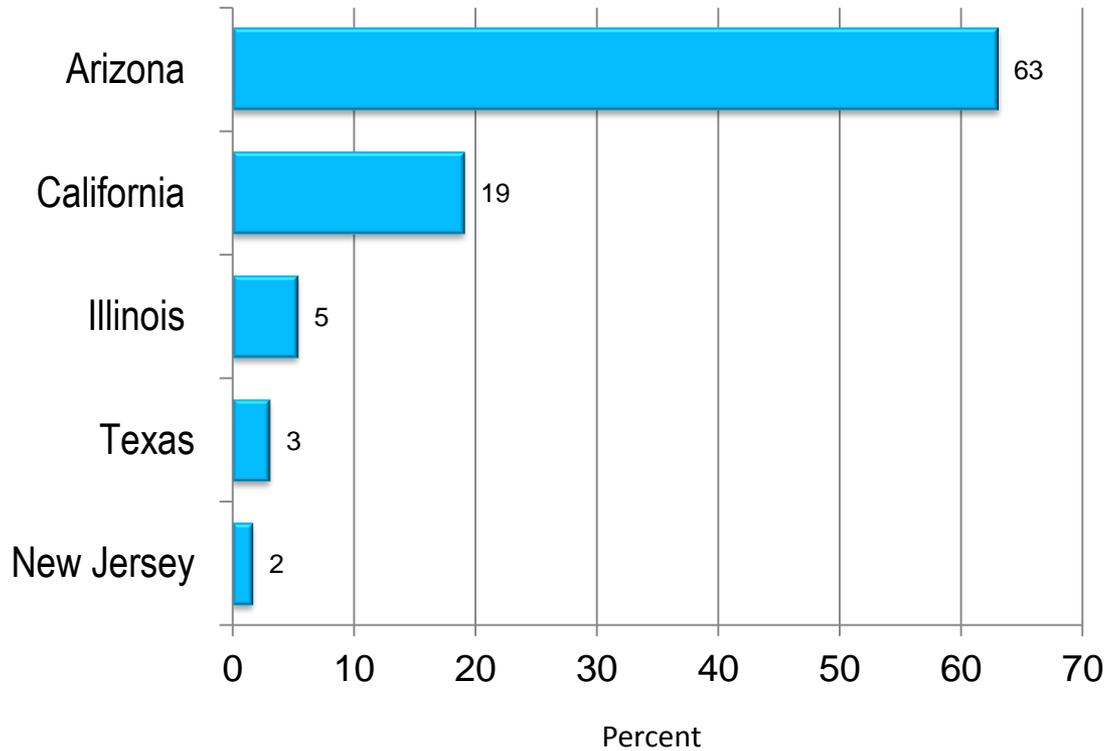
Base: Total Day Person-Trips



State Origin Of Trip



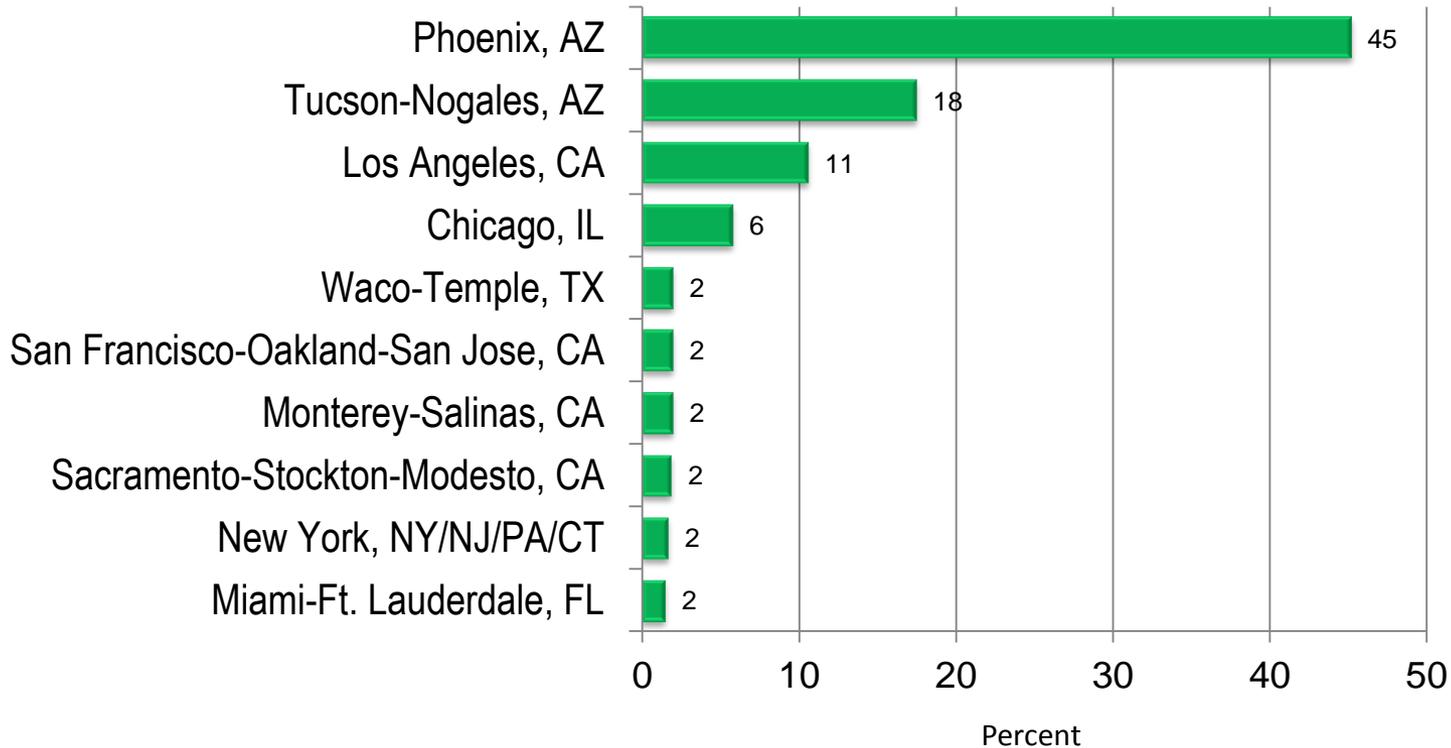
Base: Total Day Person-Trips



DMA Origin Of Trip



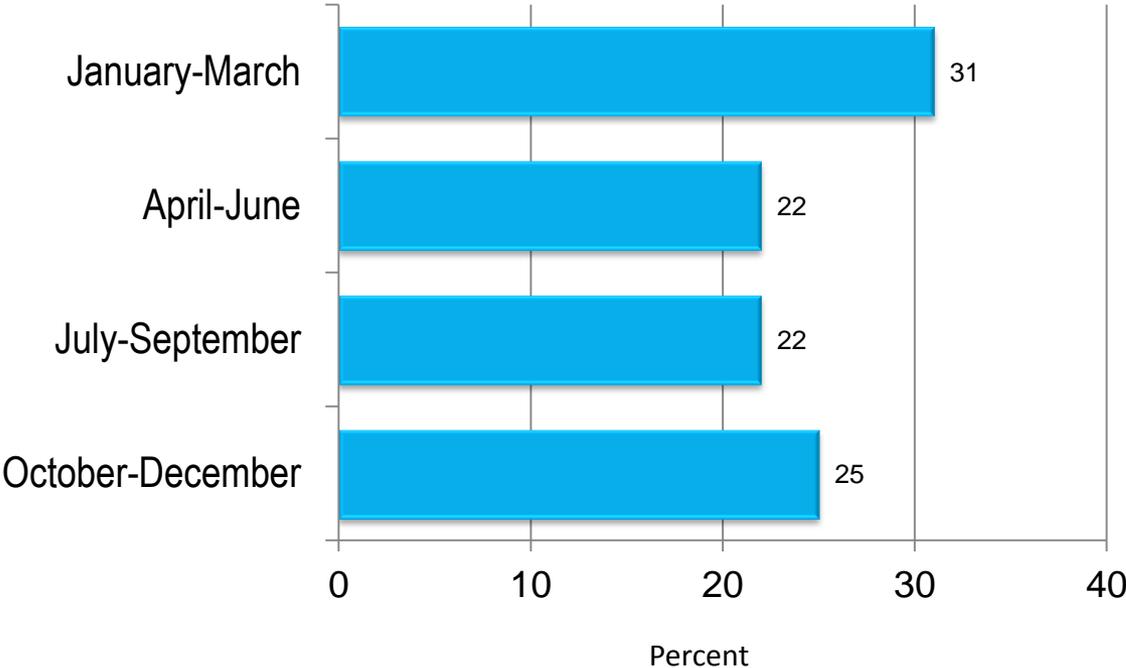
Base: Total Day Person-Trips



Season of Trip



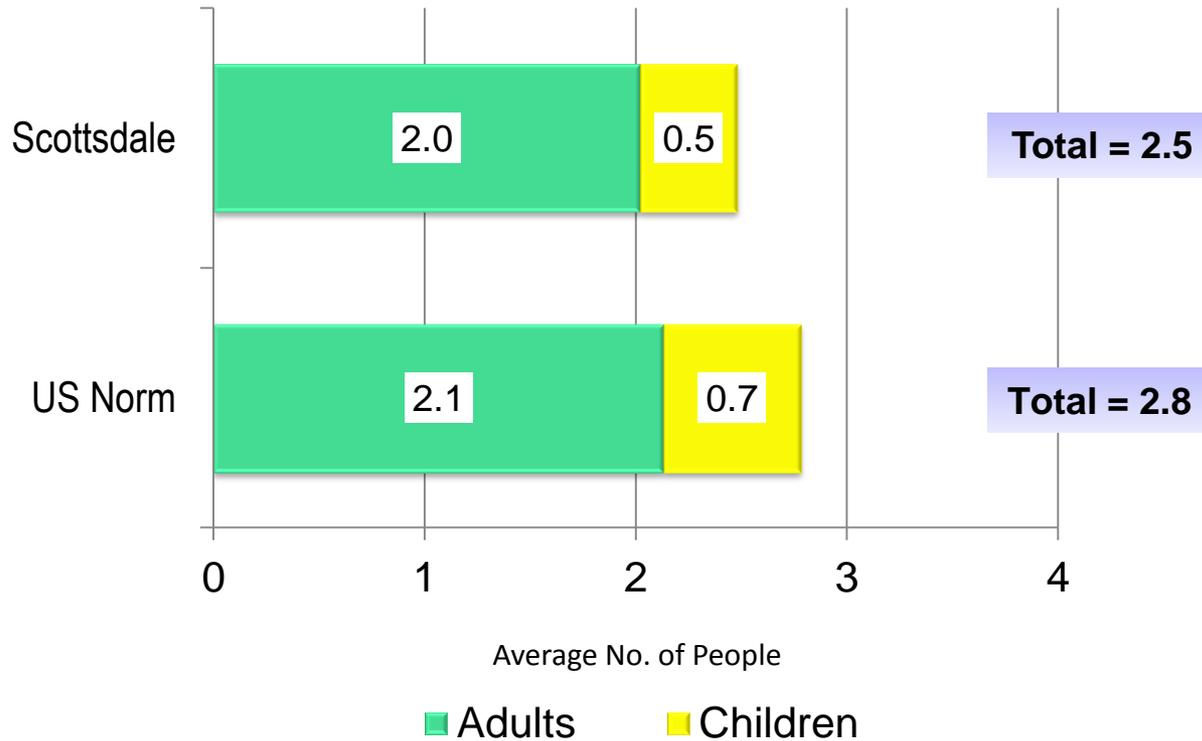
Base: Total Day Person-Trips



Size of Travel Party



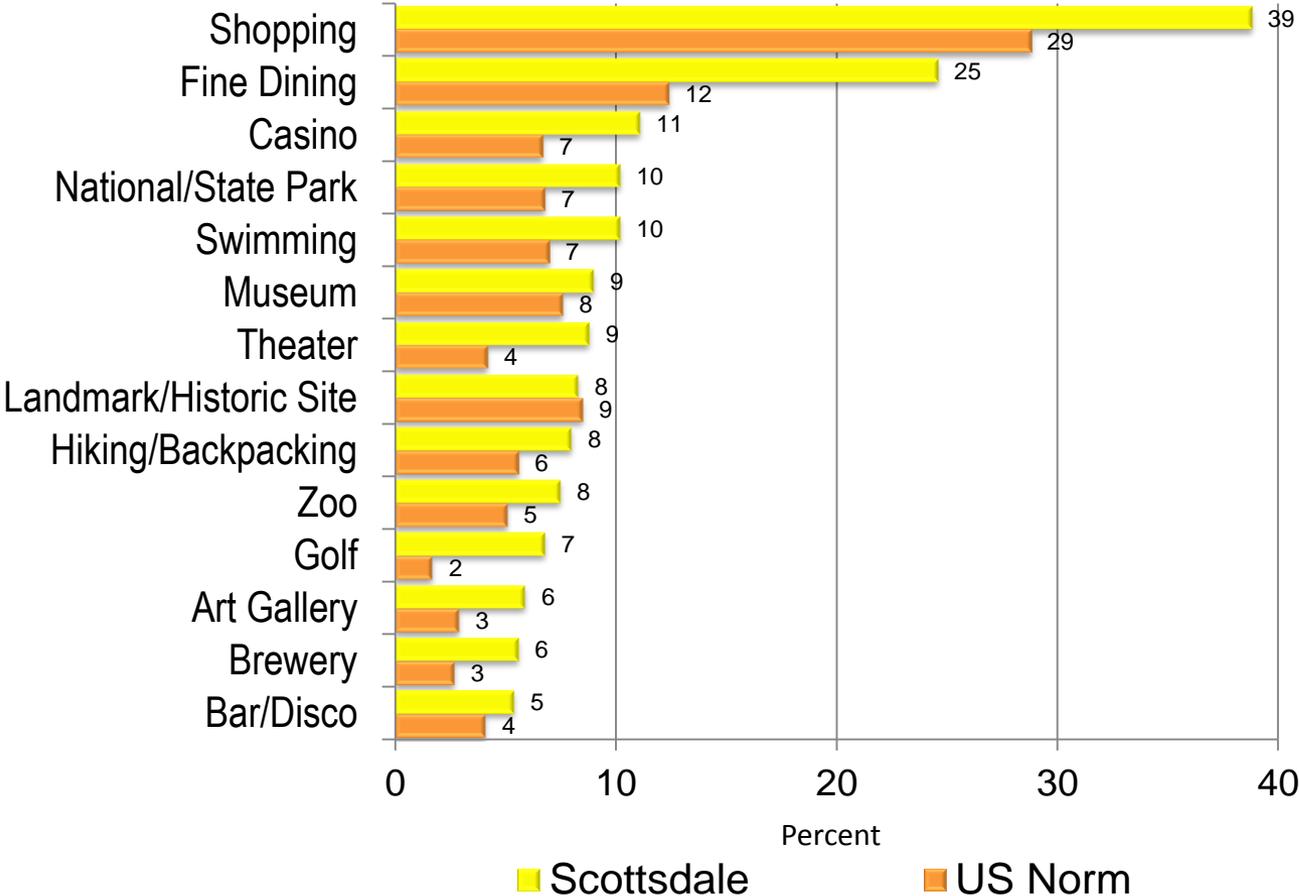
Base: Total Day Person-Trips



Activities and Experiences



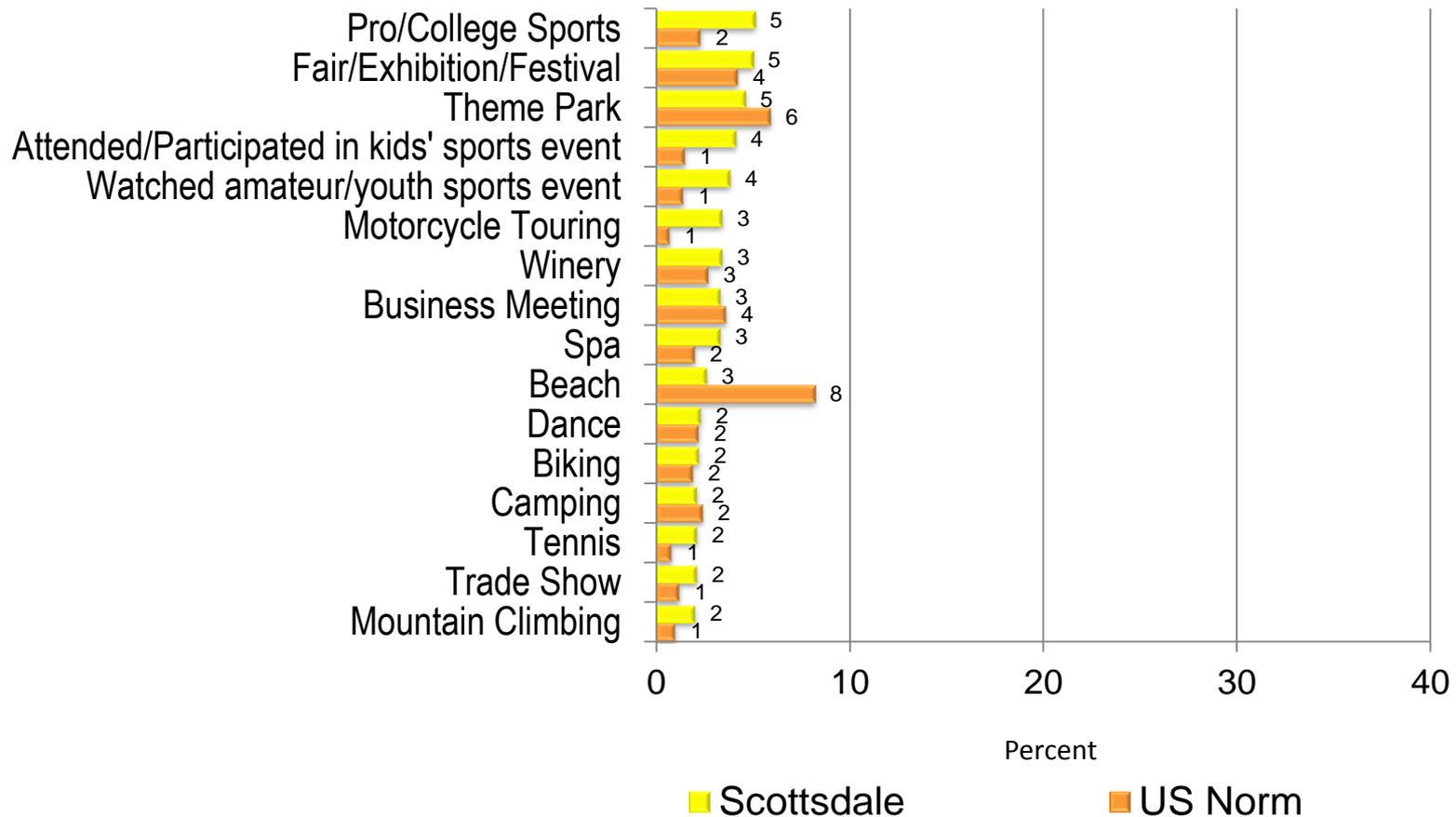
Base: Total Day Person-Trips



Activities and Experiences (Cont'd)



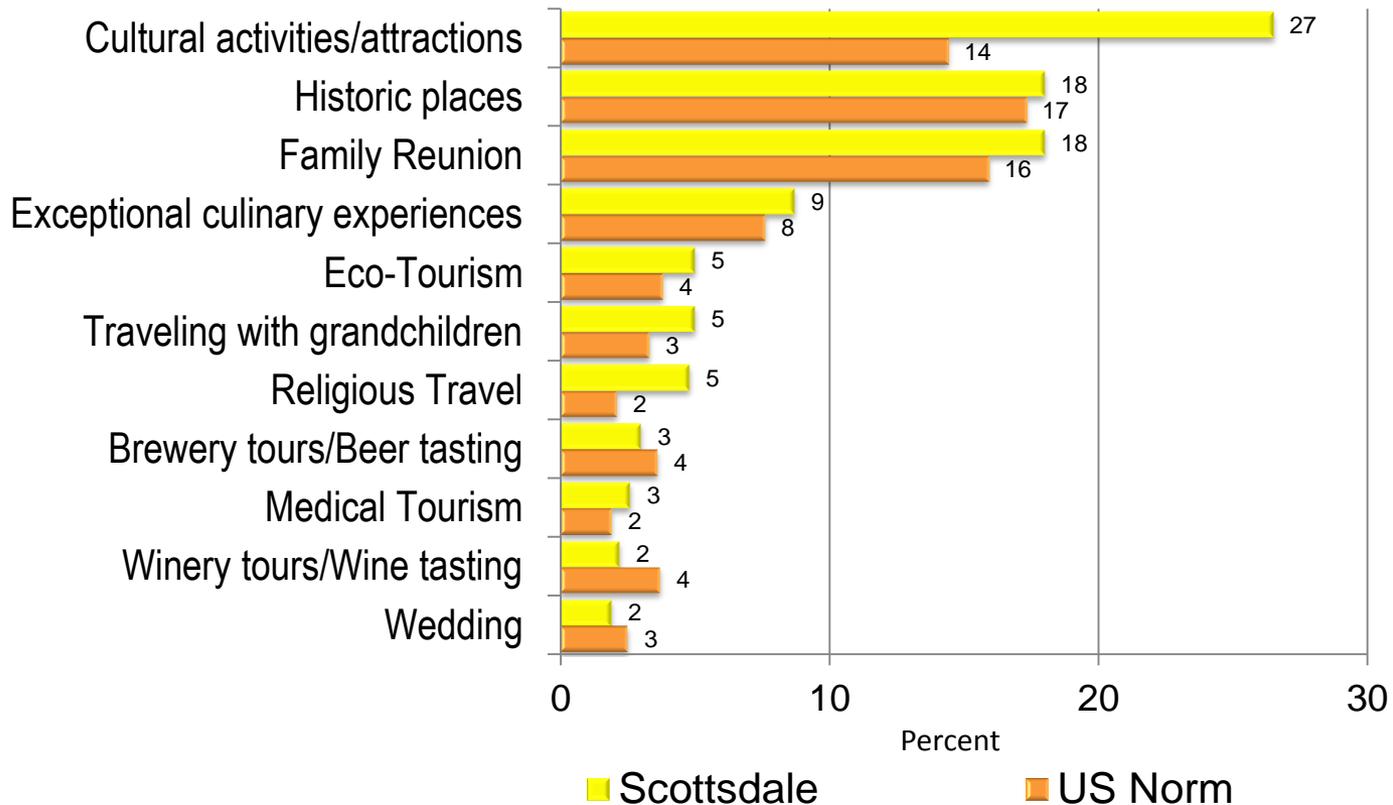
Base: Total Day Person-Trips



Activities of Special Interest



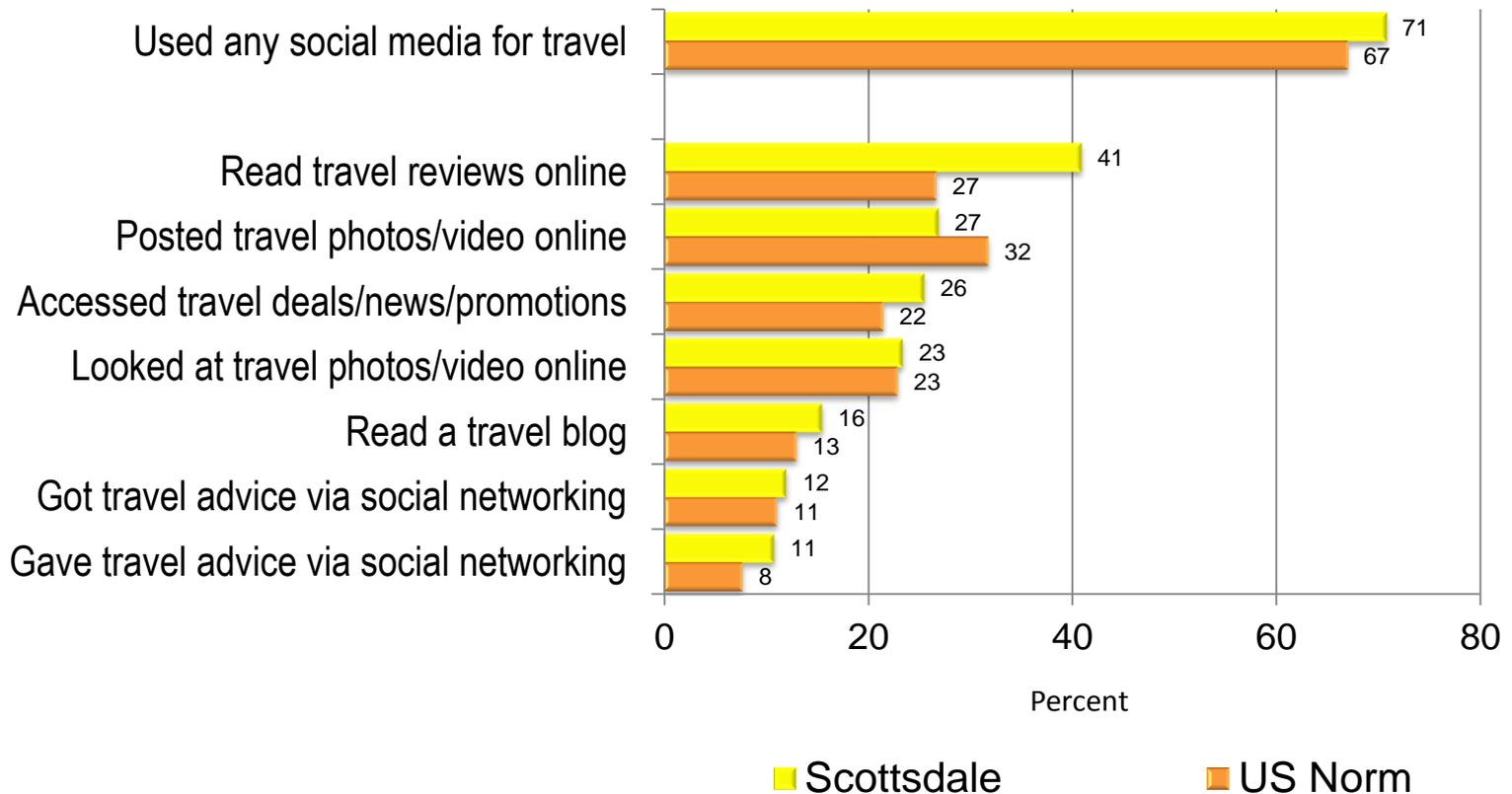
Base: Total Day Person-Trips



Social Media Use by Travelers



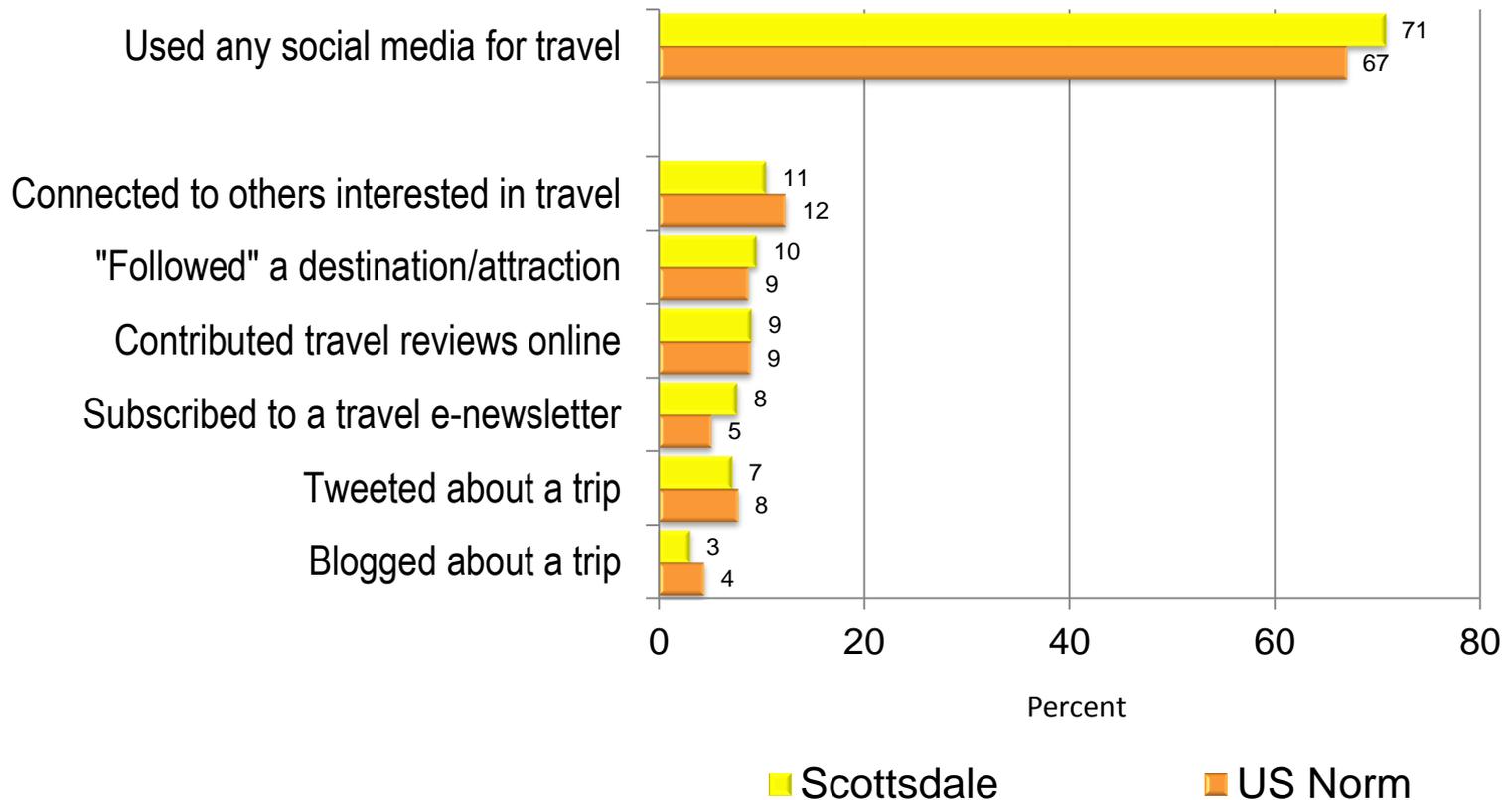
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Social Media Use by Travelers (Cont'd)



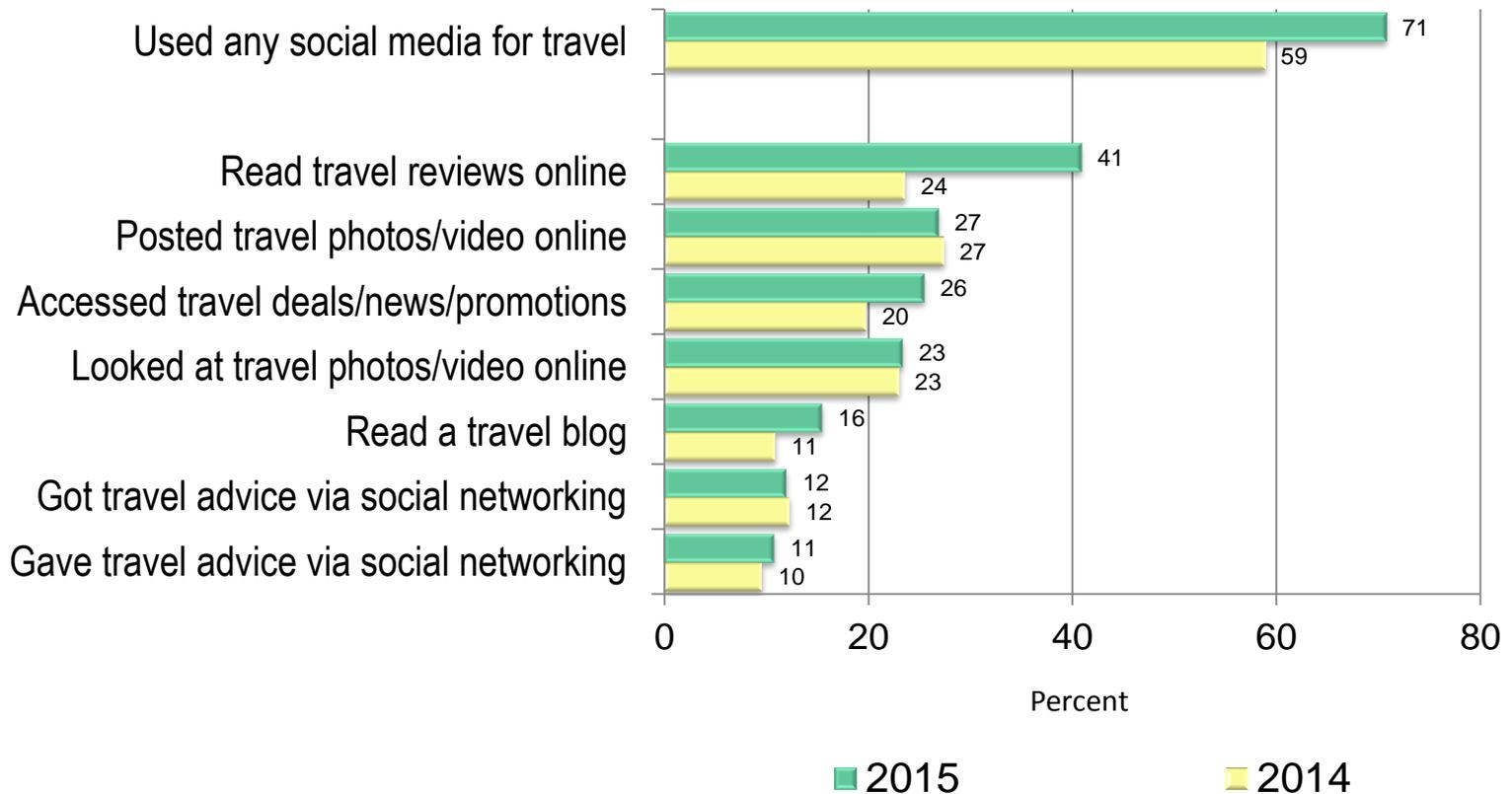
Base: Total Day Person-Trips



Social Media Use by Travelers to Scottsdale – 2015 vs. 2014



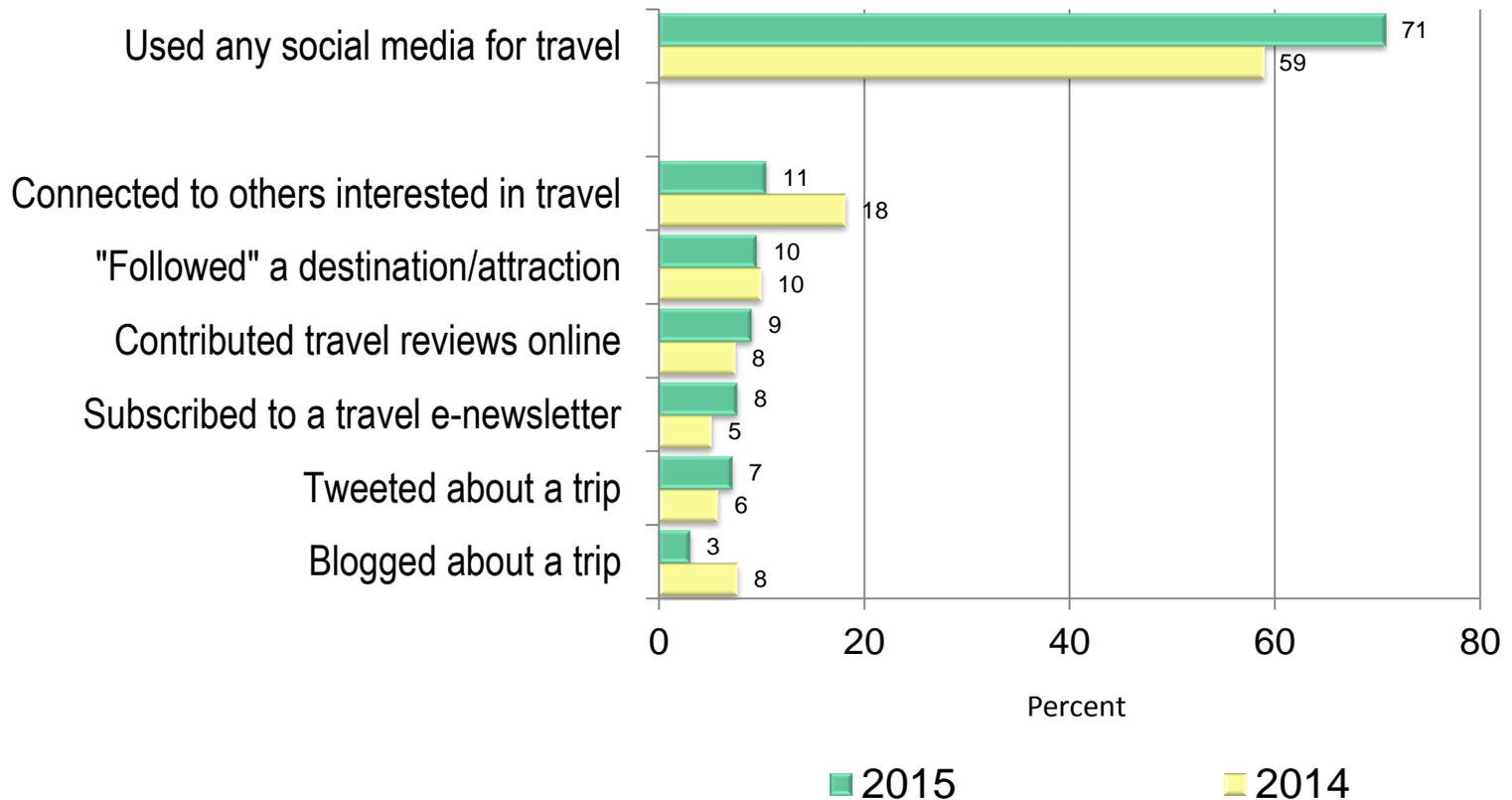
Base: Total Day Person-Trips



Social Media Use by Travelers to Scottsdale – 2015 vs. 2014 (Cont'd)



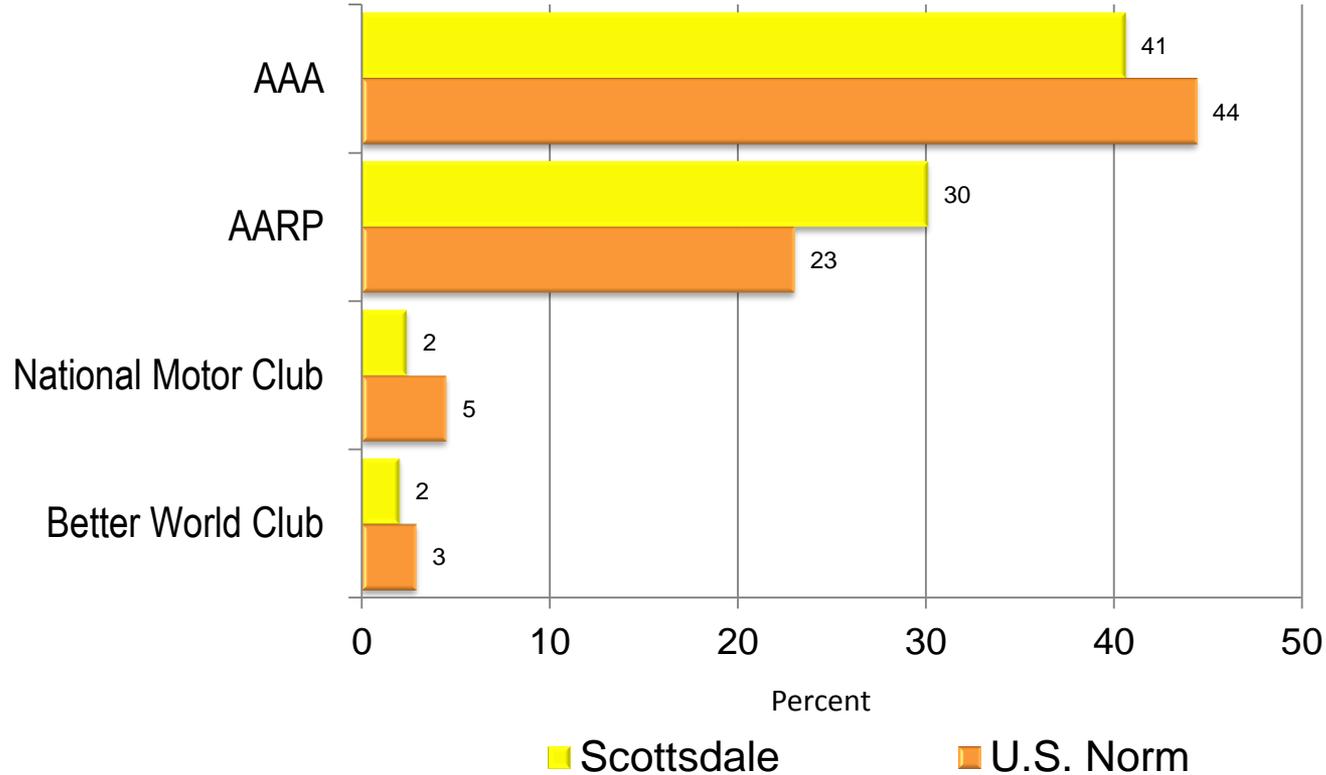
Base: Total Day Person-Trips



Organization Membership



Base: Total Day Person-Trips



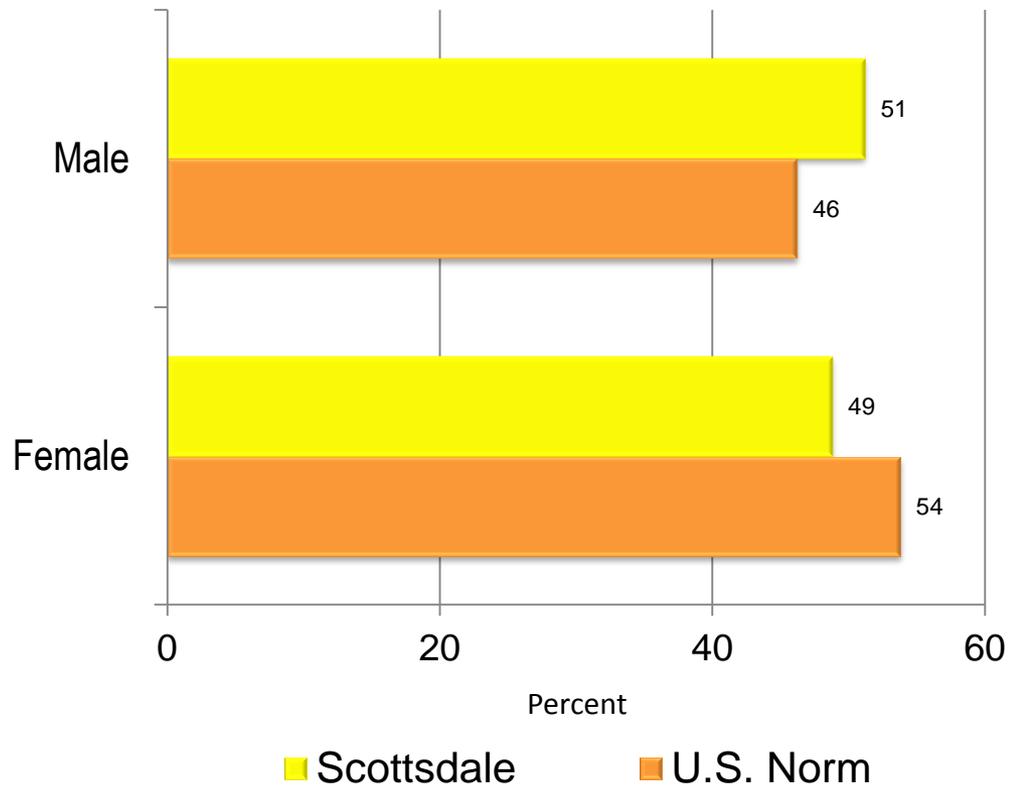


Demographic Profile of Day Visitors to Scottsdale

Gender



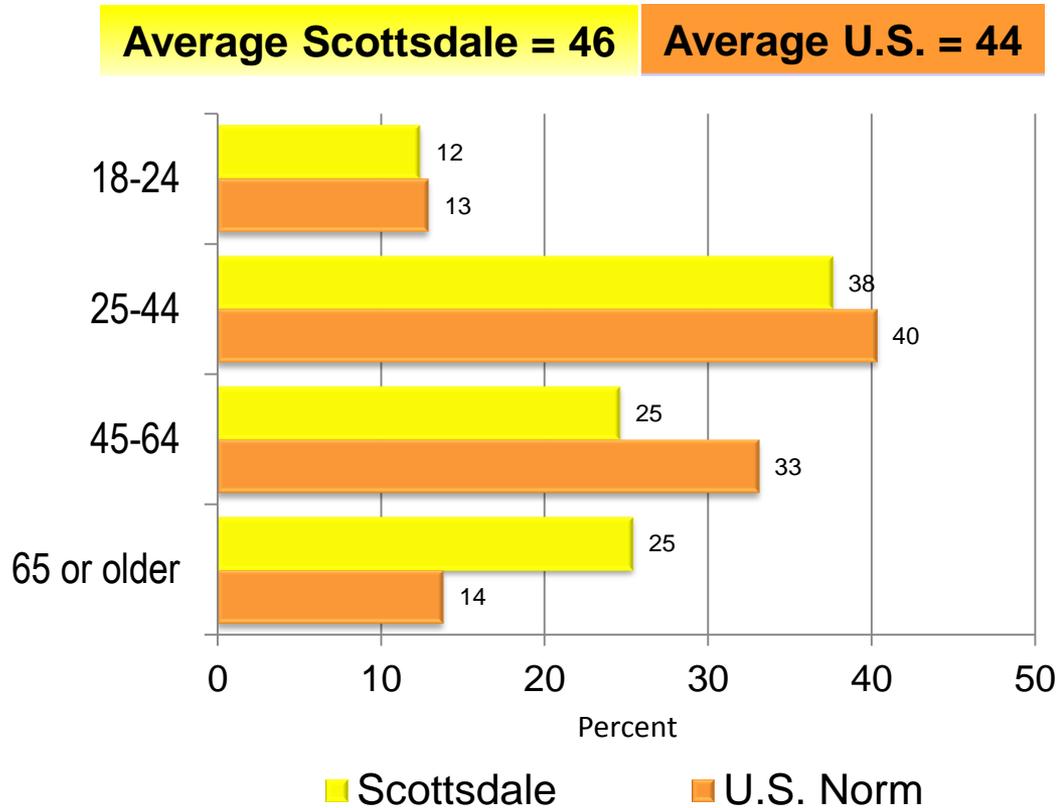
Base: Total Day Person-Trips



Age



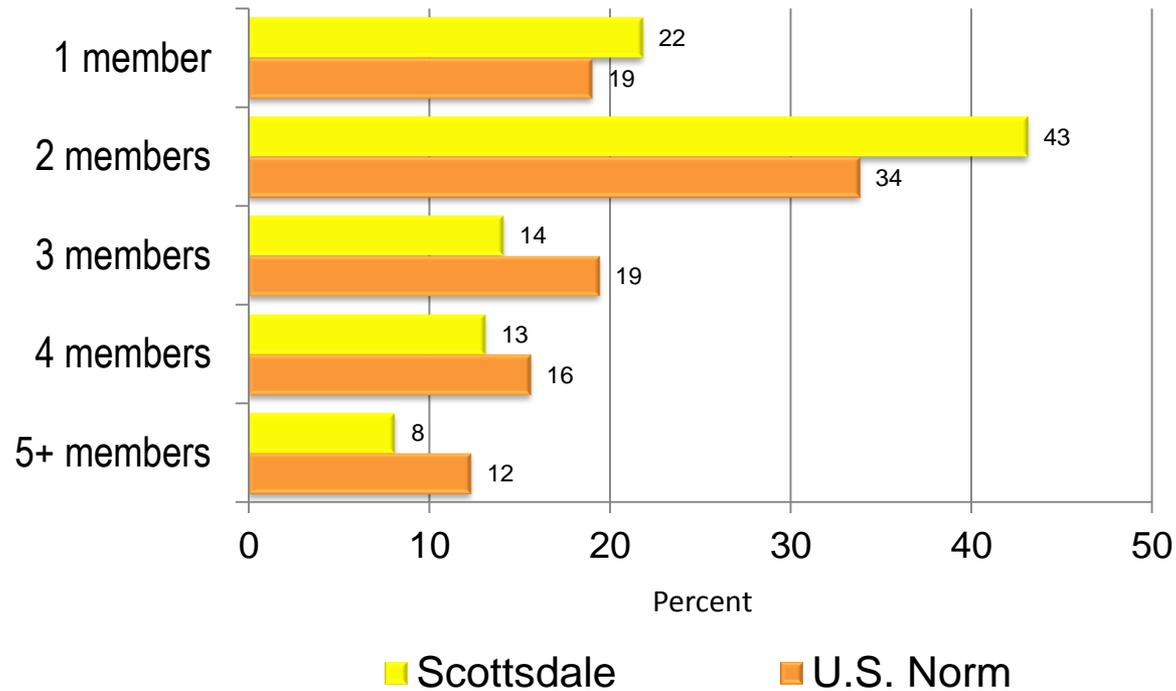
Base: Total Day Person-Trips



Household Size



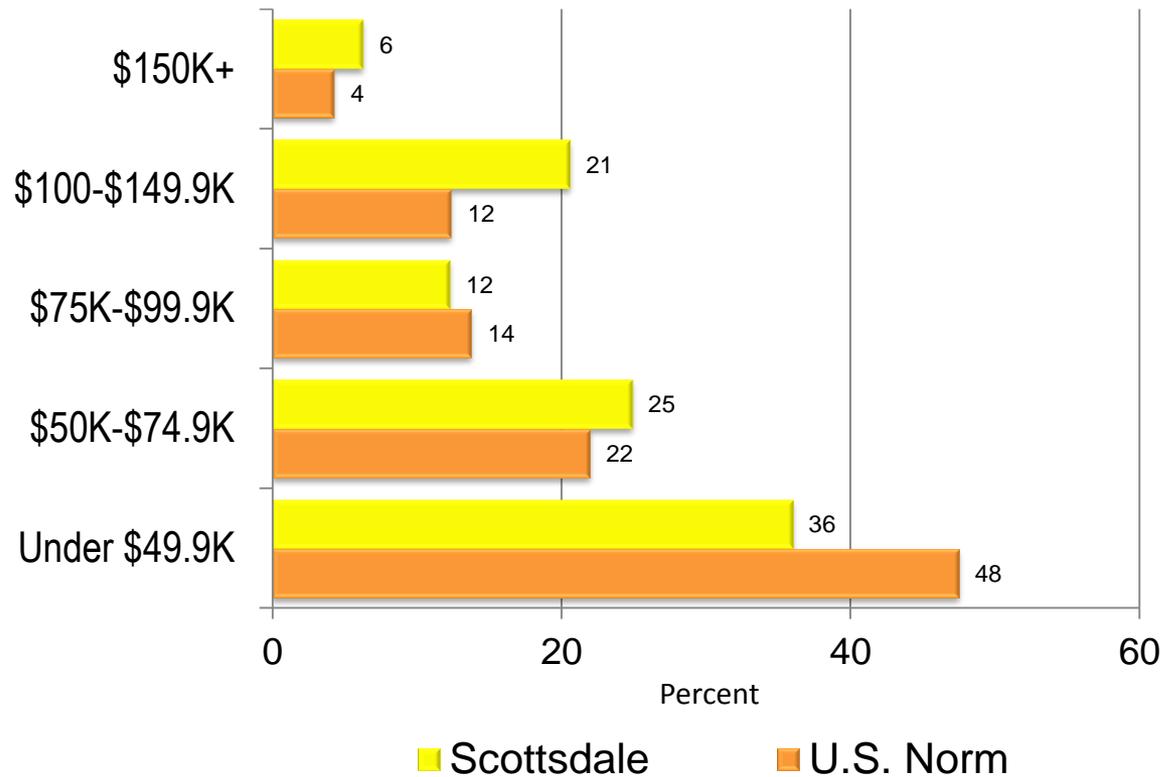
Base: Total Day Person-Trips



Household Income



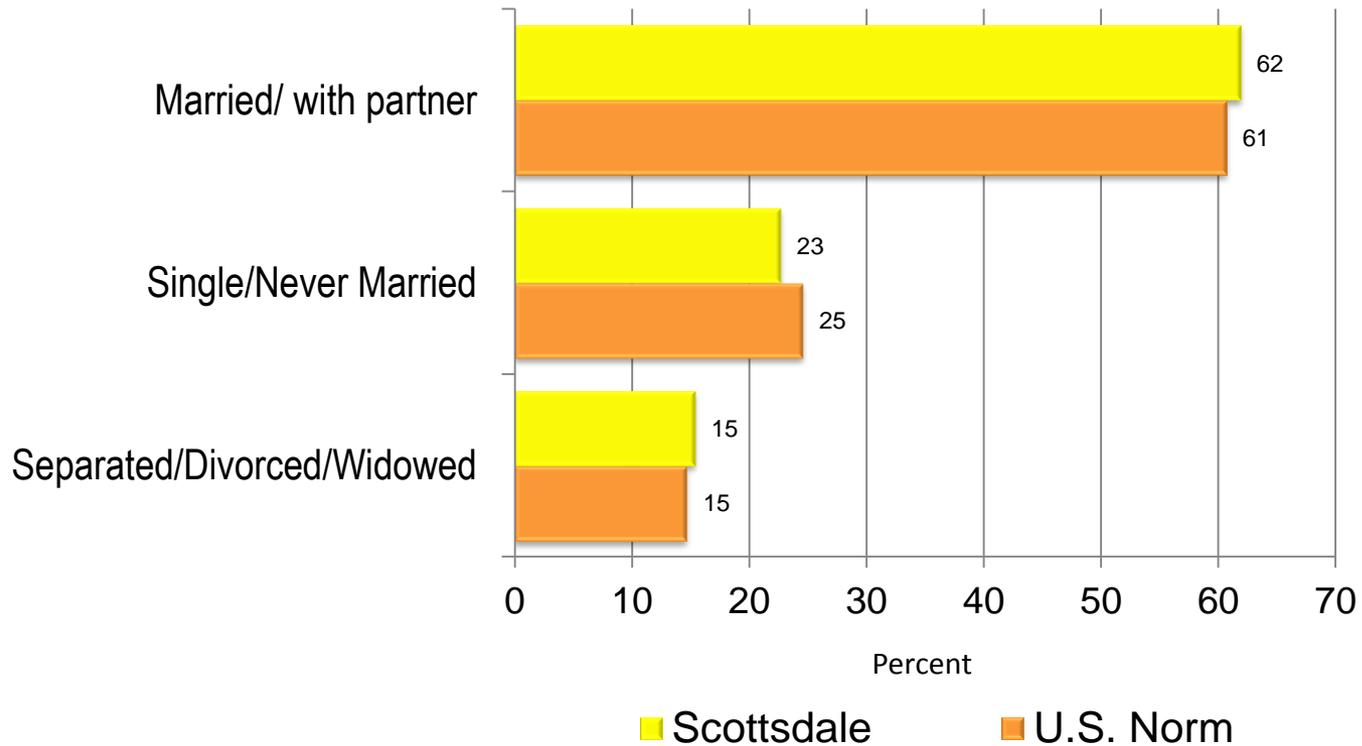
Base: Total Day Person-Trips



Marital Status



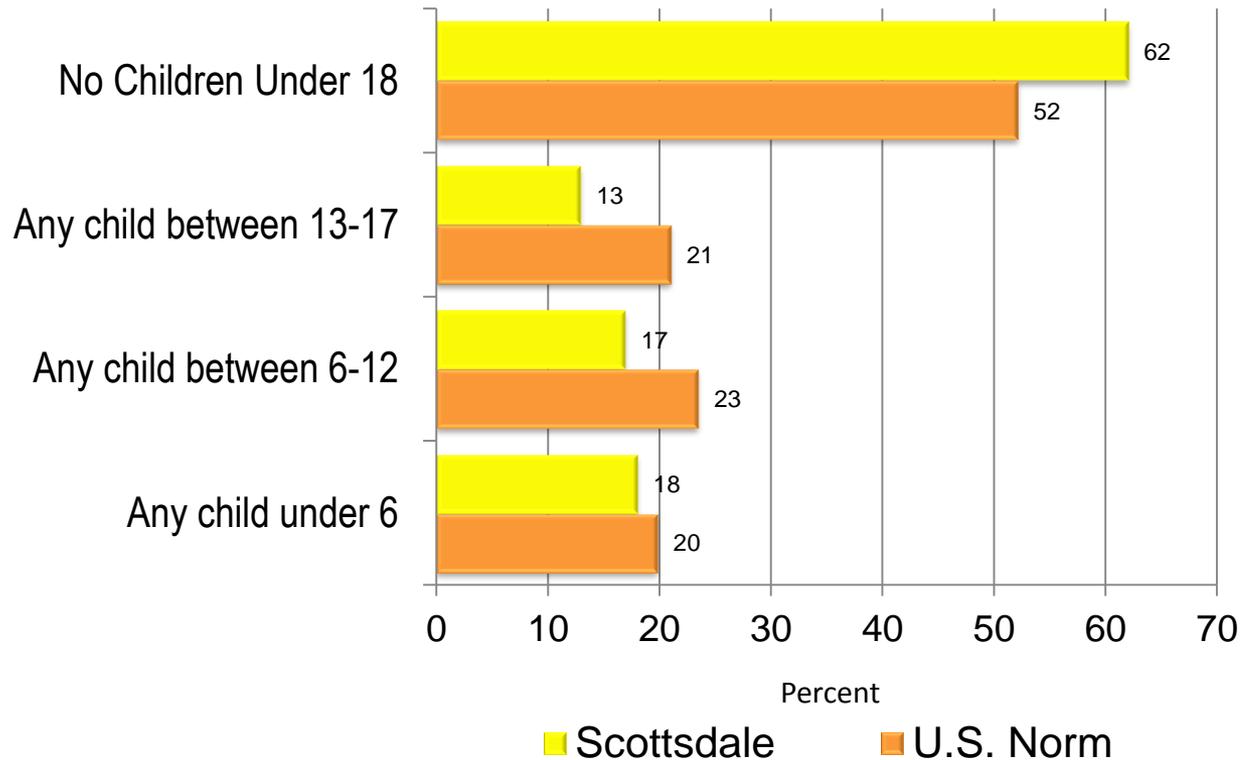
Base: Total Day Person-Trips



Children in Household



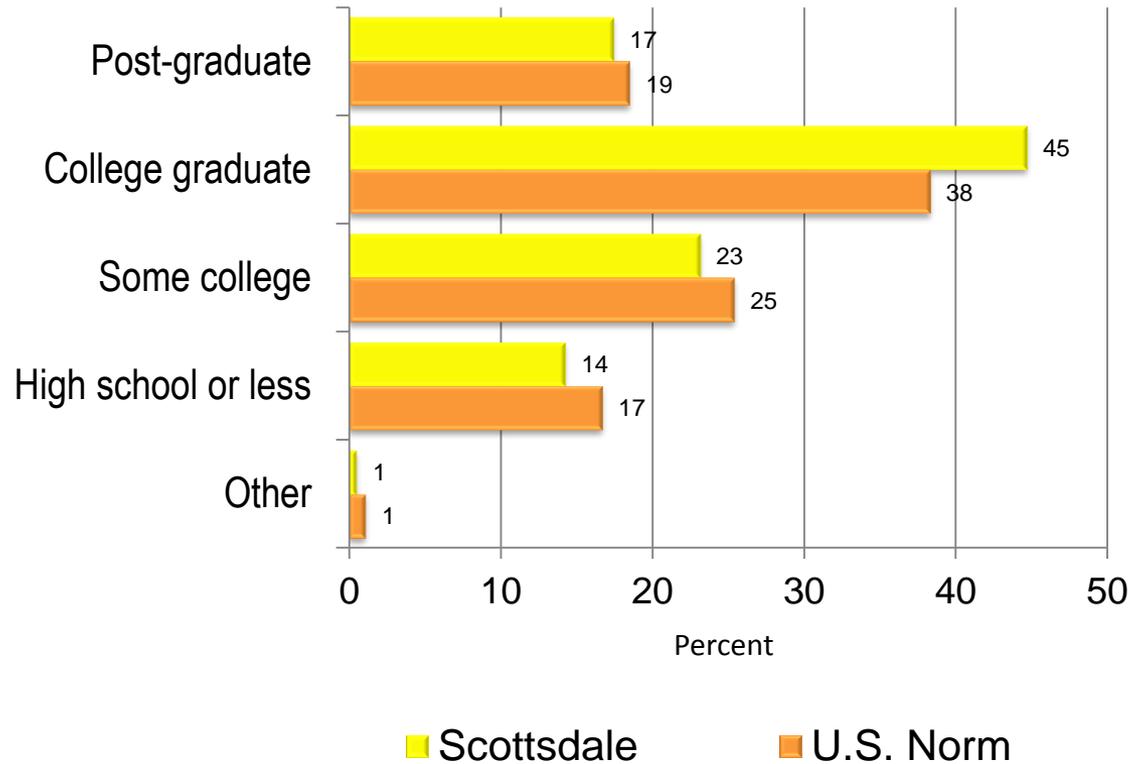
Base: Total Day Person-Trips



Education



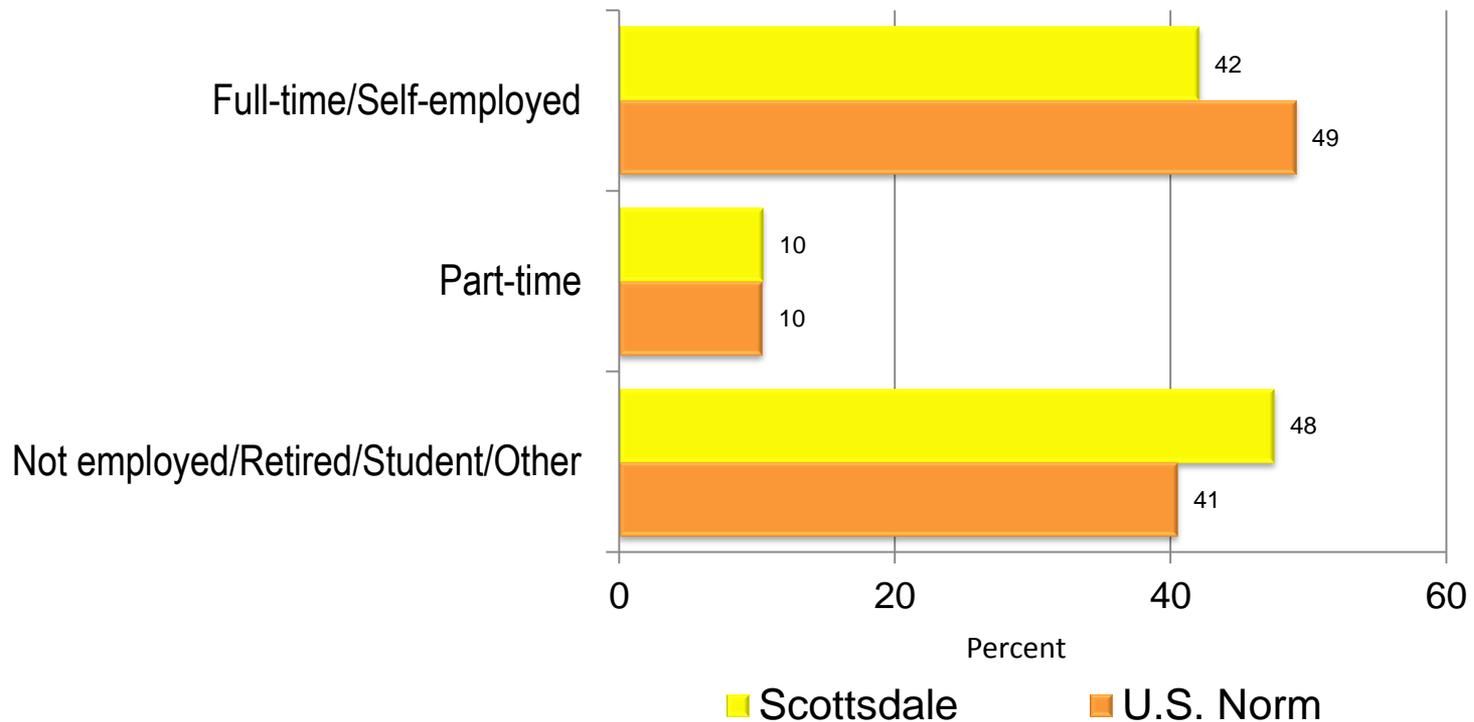
Base: Total Day Person-Trips



Employment



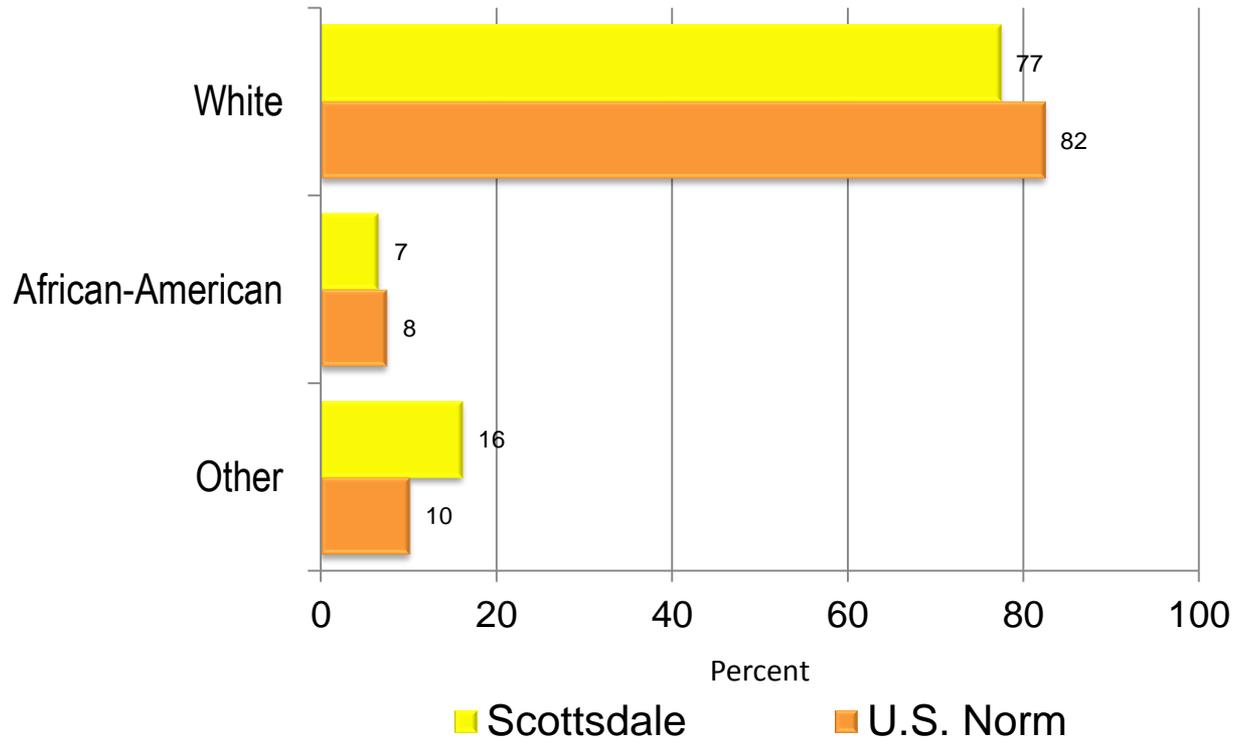
Base: Total Day Person-Trips



Race



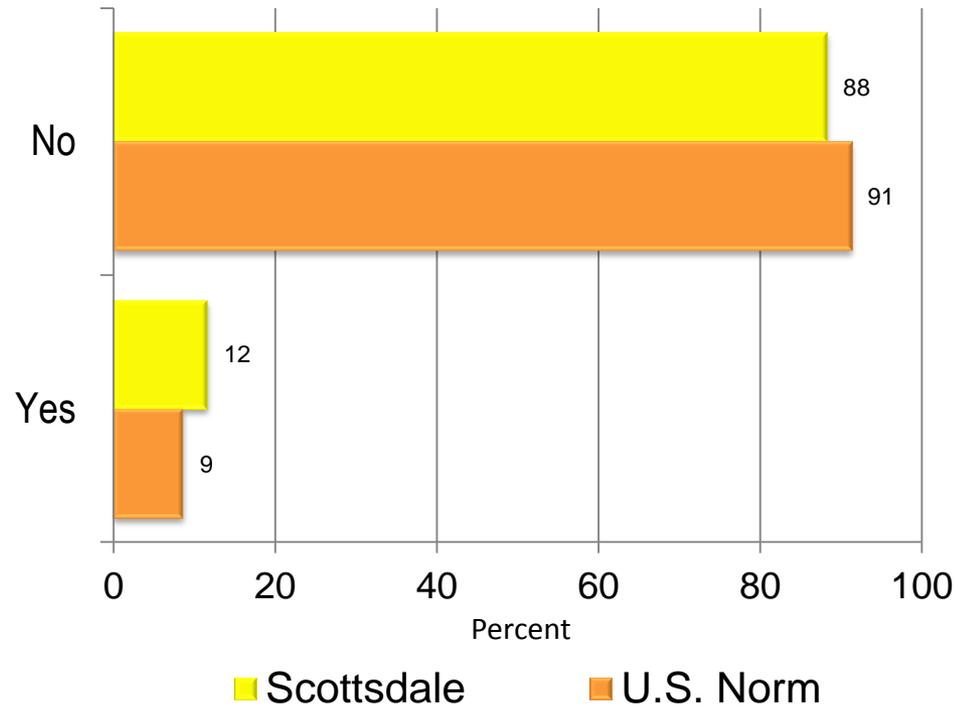
Base: Total Day Person-Trips



Hispanic Background



Base: Total Day Person-Trips





Appendix A: Key Terms Defined

Key Terms Defined



- ⦿ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ⦿ A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- ⦿ A **Person-Trip** is one trip taken by one visitor.
 - ⦿ *Person-trips are the key unit of measure for this report.*

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

- ◉ **Leisure Trips:** includes all trips where the main purpose was one of the following:
 - ◉ *Visiting friends/relatives*
 - ◉ *Touring through a region to experience its scenic beauty, history and culture*
 - ◉ *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
 - ◉ *Special event, such as a fair, festival, or sports event*
 - ◉ *City trip*
 - ◉ *Cruise*
 - ◉ *Casino*
 - ◉ *Theme park*
 - ◉ *Resort (ocean beach, inland or mountain resort)*
 - ◉ *Skiing/snowboarding*
 - ◉ *Golf*
- ◉ **Business Trips:** includes
 - ◉ *Conference/convention*
 - ◉ *Other business trip*
- ◉ **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips:

Includes all leisure trips, with the exception of visits to friends/relatives