



Visitor Research 2018 Overnight & Day Visitation Report

Prepared for Scottsdale
June 2019

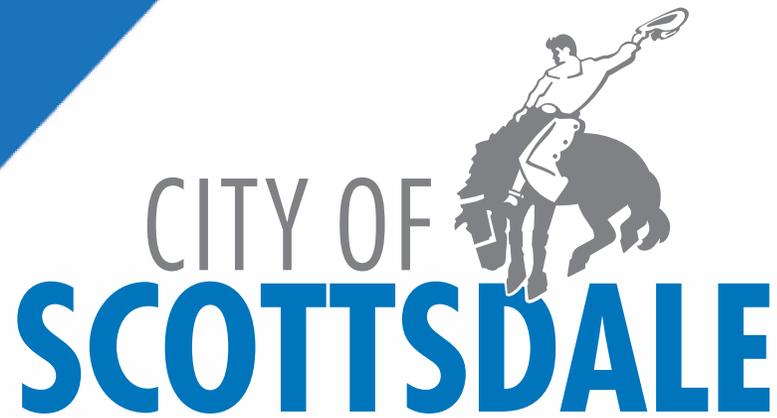


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Introduction & Research Objectives

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 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 2018.

The visitor research program is designed to provide:

- Estimates of domestic overnight and day visitor volumes to Scottsdale.
- A profile of Scottsdale's performance within its overnight travel market.
- Domestic visitor expenditures in Scottsdale.
- Profiles of Scottsdale's day travel market.
- Relevant trends in each of these areas.

Methodology

Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel **USA**[®] survey that is selected to be representative of the U.S. adult population

For the 2018 travel year, this yielded:

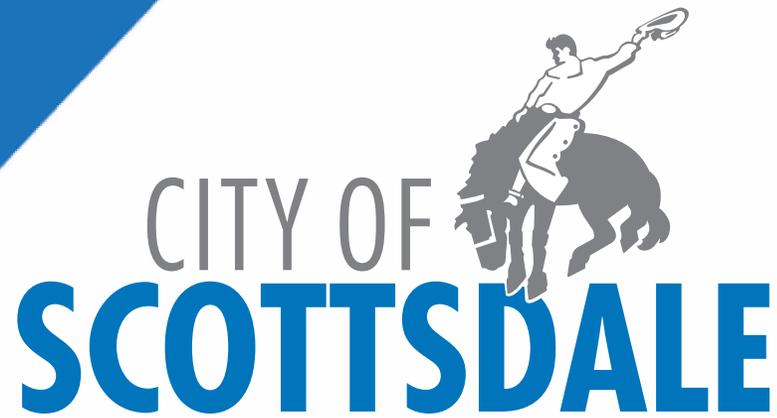
- 329,599 trips for analysis nationally
 - 233,098 overnight trips
 - 96,501 day trips
- For Scottsdale, the following sample was achieved in 2018:
 - 1,101 trips:
 - 903 overnight trips
 - 198 day trips (our analysis is based on 2017 and 2018 data for day trips, which equals 411 day trips)
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



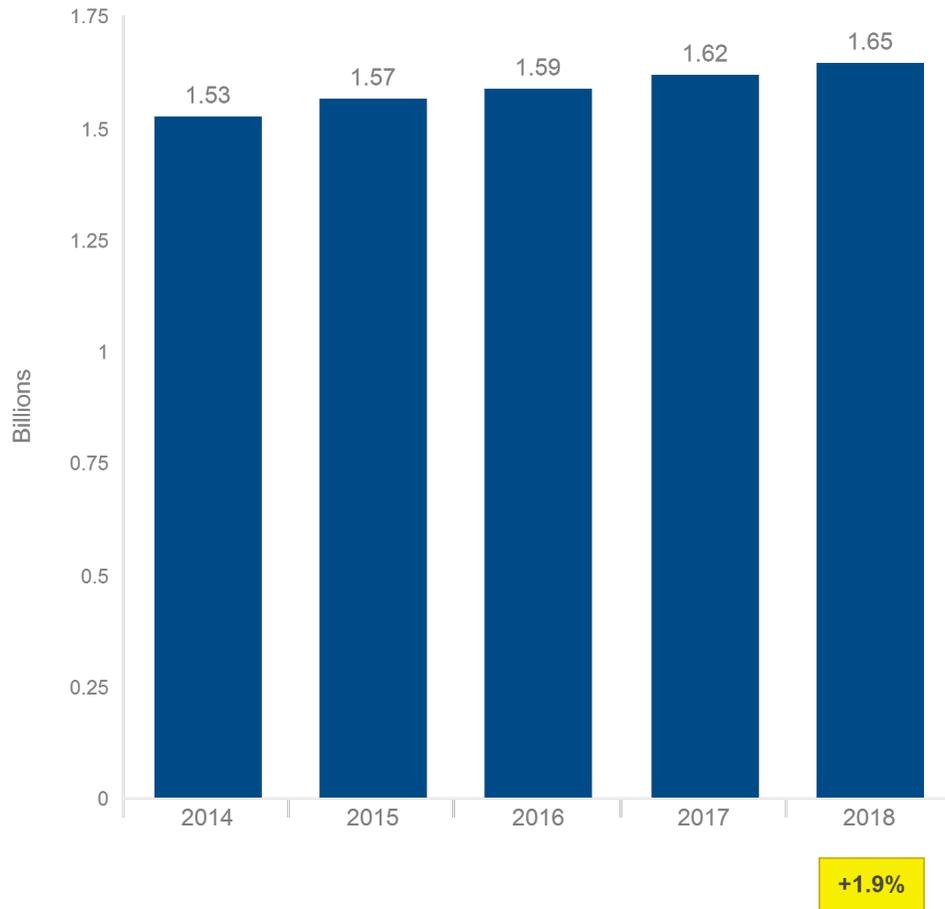
Visitor Research

2018 Overnight Visitation Report

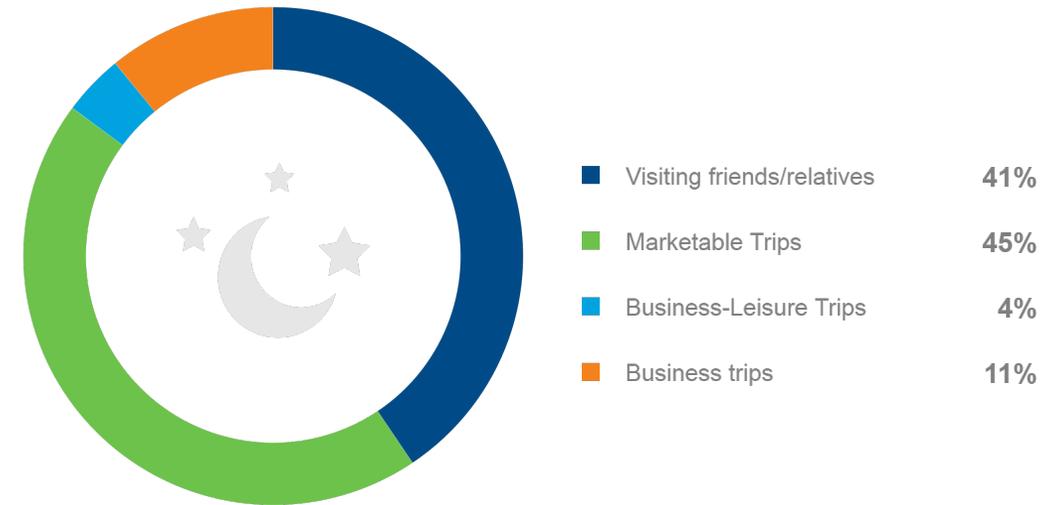
Prepared for
Scottsdale
June 2019



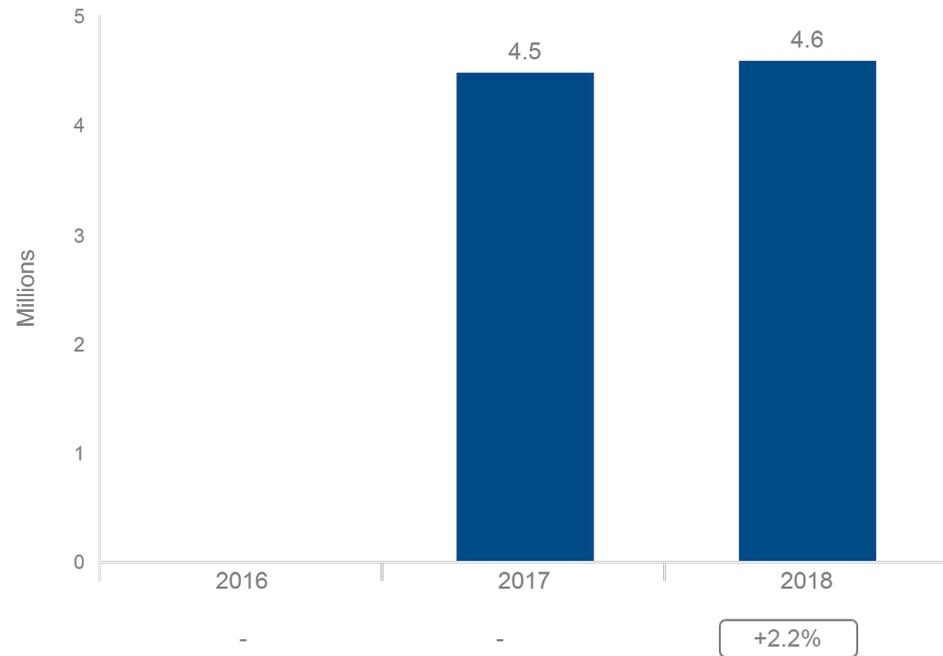
Total Size of U.S. Overnight Travel Market



2018 Overnight Trips



Overnight Trips to Scottsdale

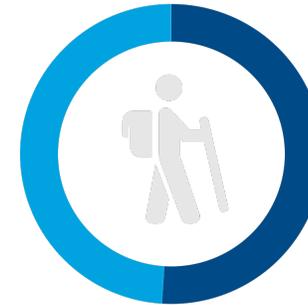


Total Size of Scottsdale 2018 Domestic Travel Market

Total Person-Trips

9.1 Million

+2.5% vs. last year



- Day
49% | 4.4 Million
- Overnight
51% | 4.6 Million

Domestic Overnight Expenditures - by Sector

Total Spending

\$ 1.344 Billion

+6.4% vs. last year

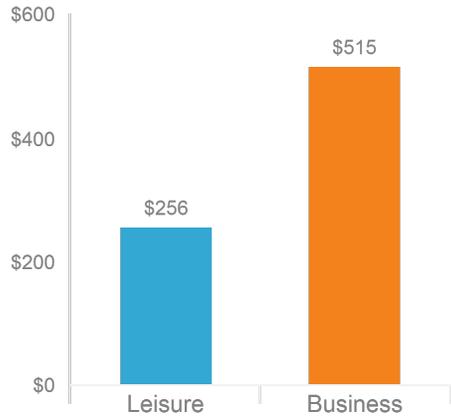


- Lodging
41% | \$557 Million
- Transportation at Destination
8% | \$105 Million
- Restaurant Food & Beverage
27% | \$367 Million
- Retail Purchase
12% | \$165 Million
- Recreation/Entertainment
11% | \$149 Million

Average Per Person Expenditures on Domestic Overnight Trips - by Sector



Average Per Person Expenditures on Domestic Overnight Trips - by Trip Purpose



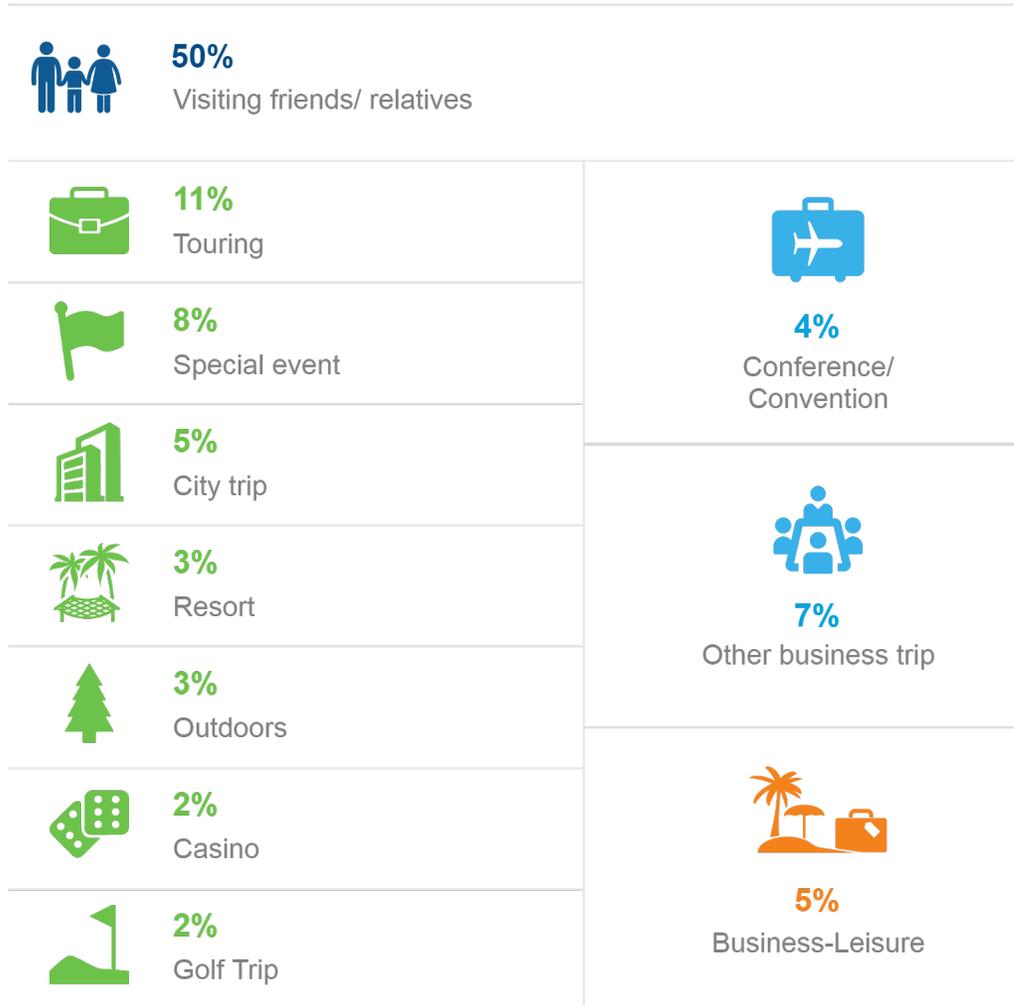
Average Per Party Expenditures on Domestic Overnight Trips - by Trip Purpose



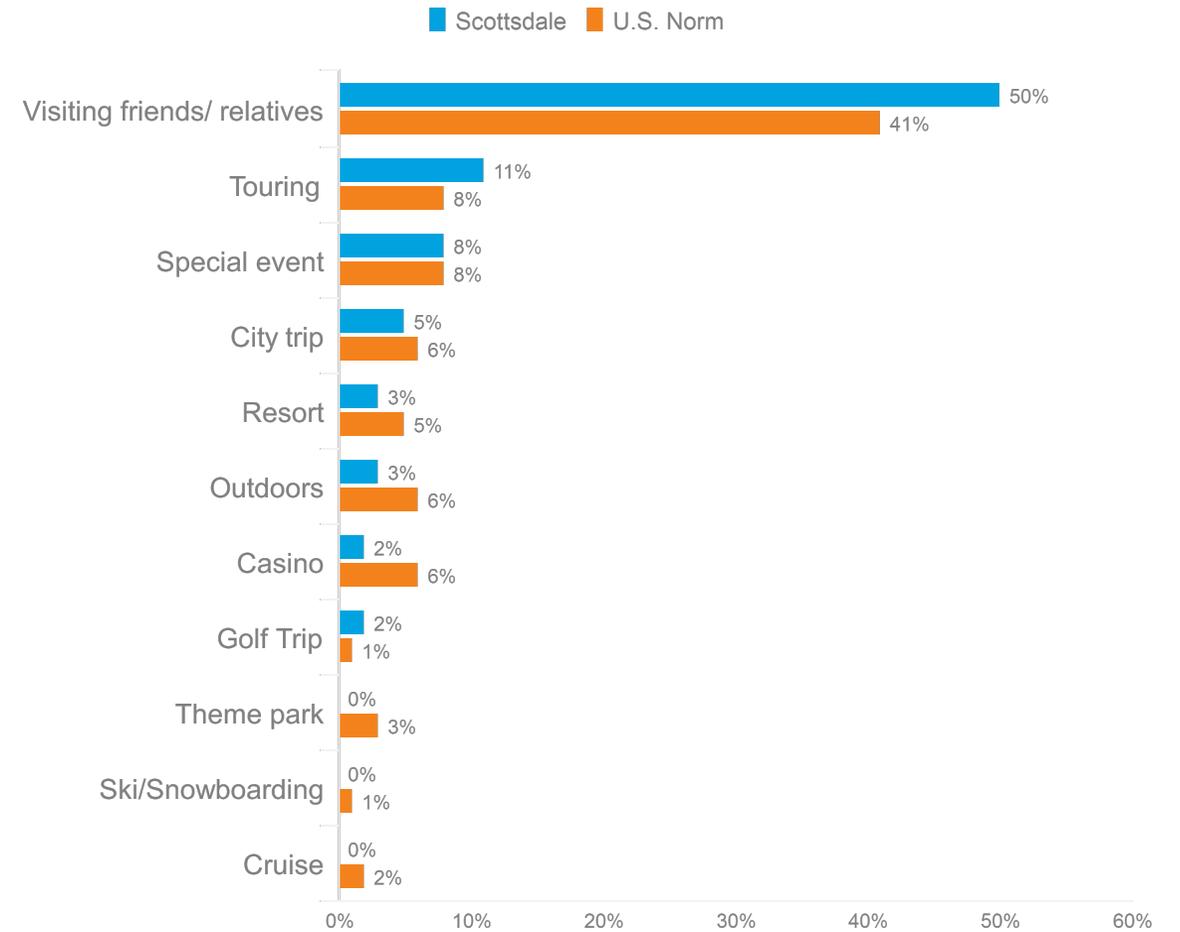
Average Per Party Expenditures on Domestic Overnight Trips - by Sector



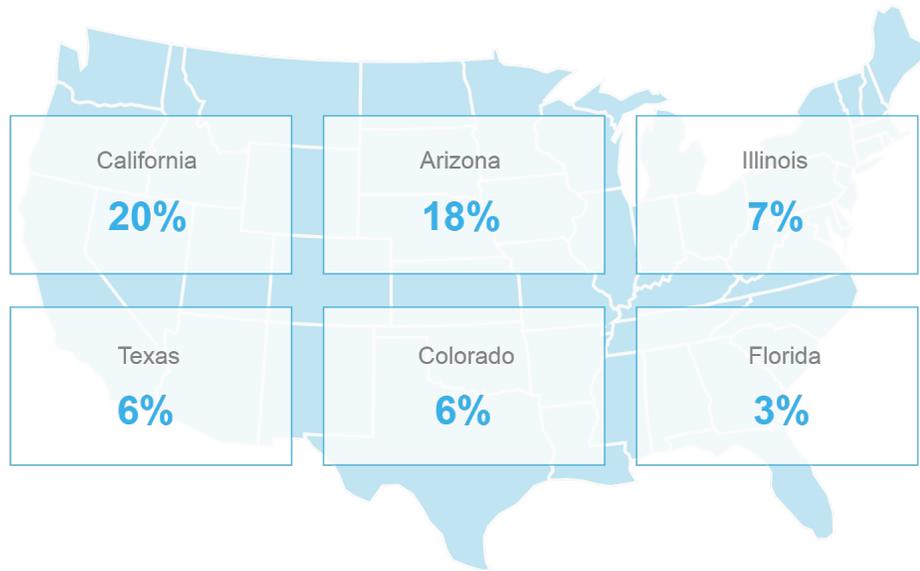
Main Purpose of Trip



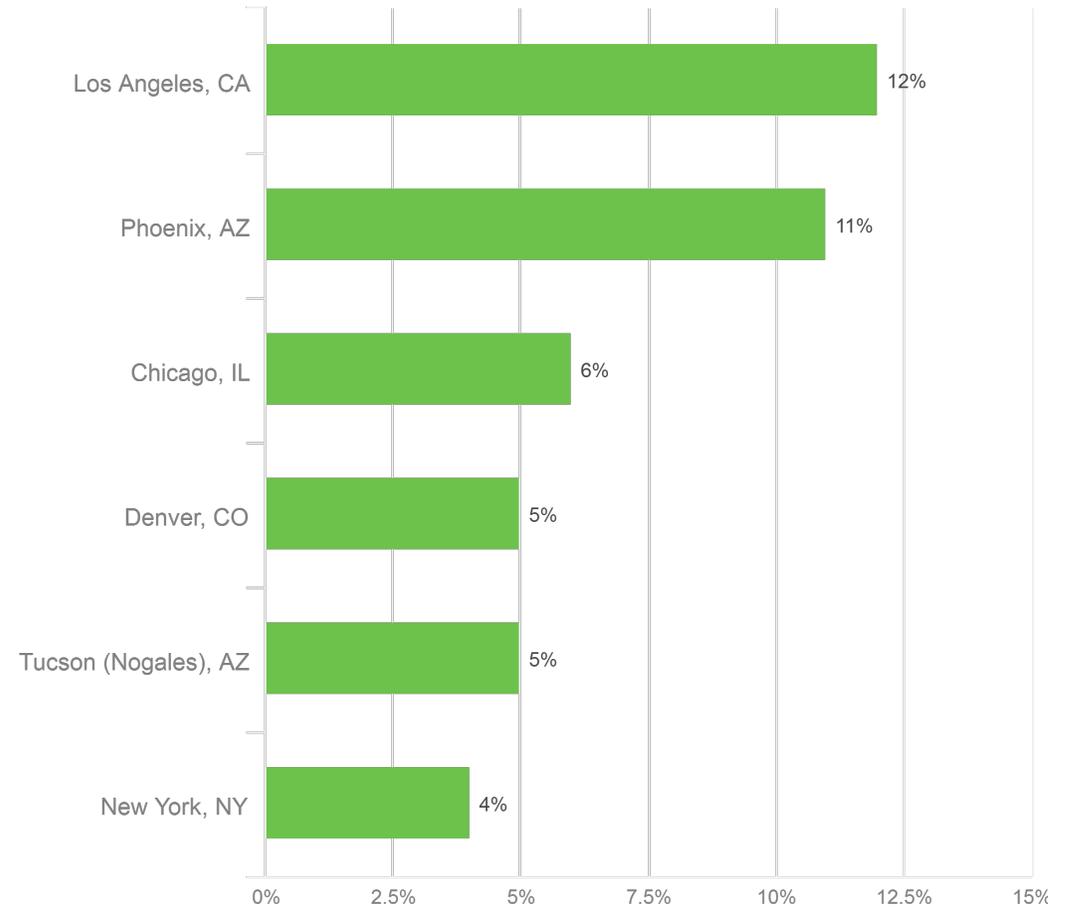
Main Purpose of Leisure Trip



State Origin Of Trip



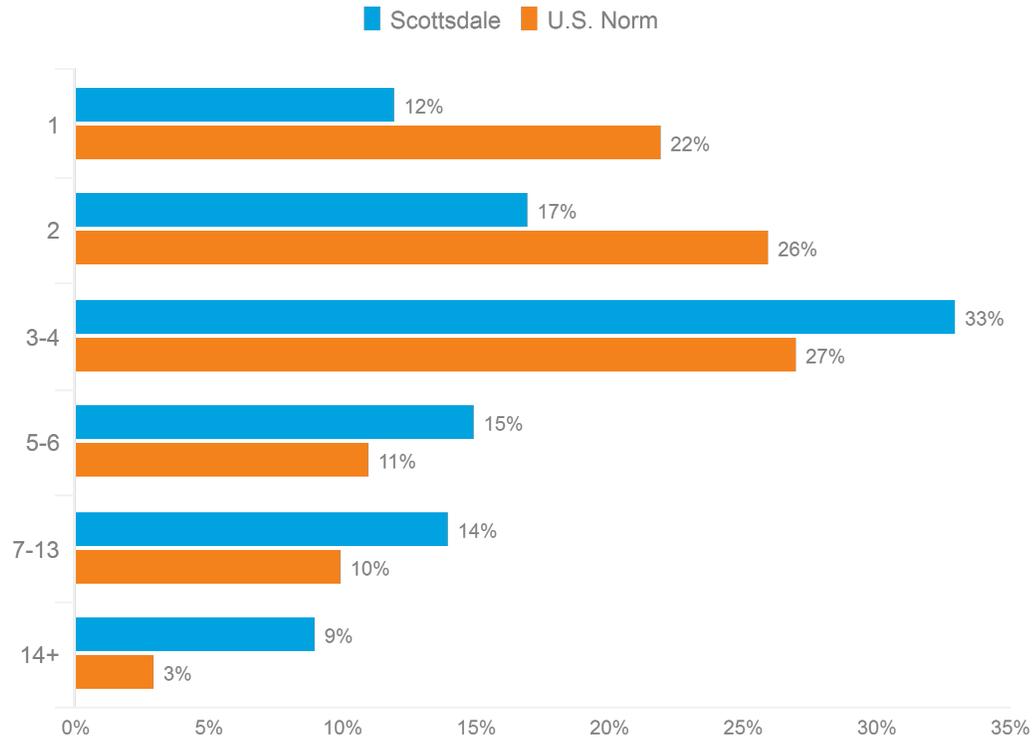
DMA Origin Of Trip



Season of Trip

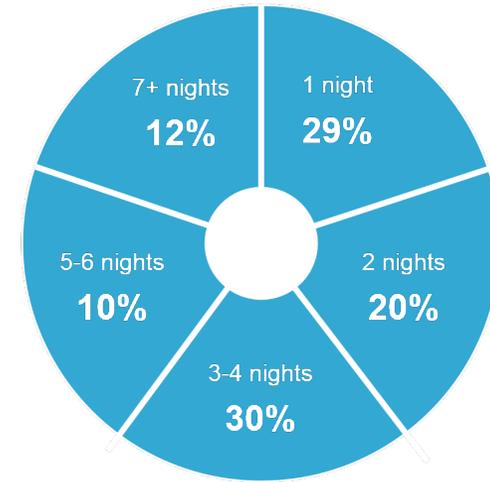


Total Nights Away on Trip



Scottsdale
5.6
Average Nights

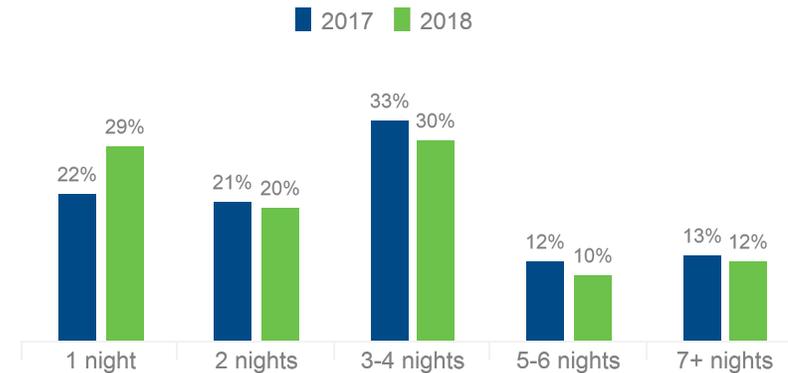
U.S. Norm
3.8
Average Nights



Nights Spent in Scottsdale

Average number of nights
3.9

Number of Nights Spent in Scottsdale - Trended



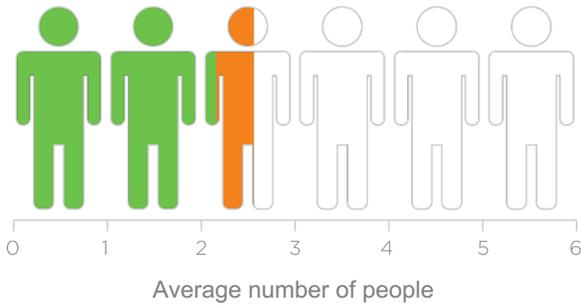
Average in 2018
3.9
Nights

Average last year
3.9
Nights

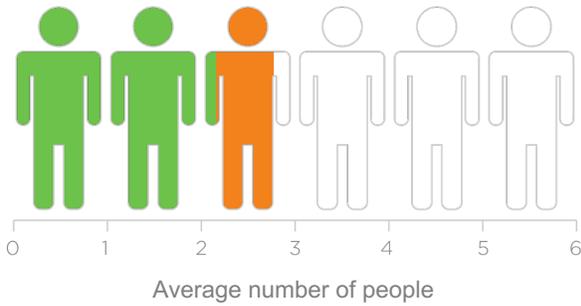
Size of Travel Party

■ Adults ■ Children

Scottsdale

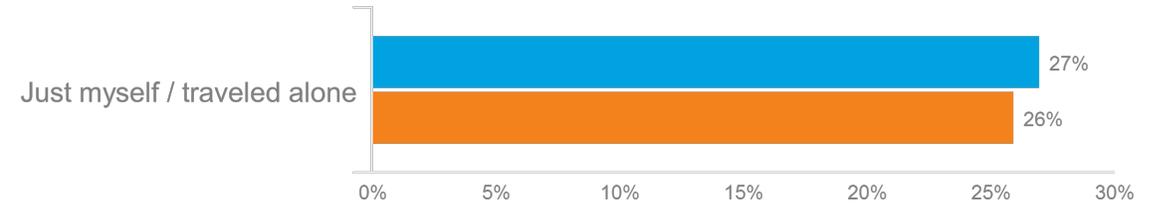


U.S. Norm



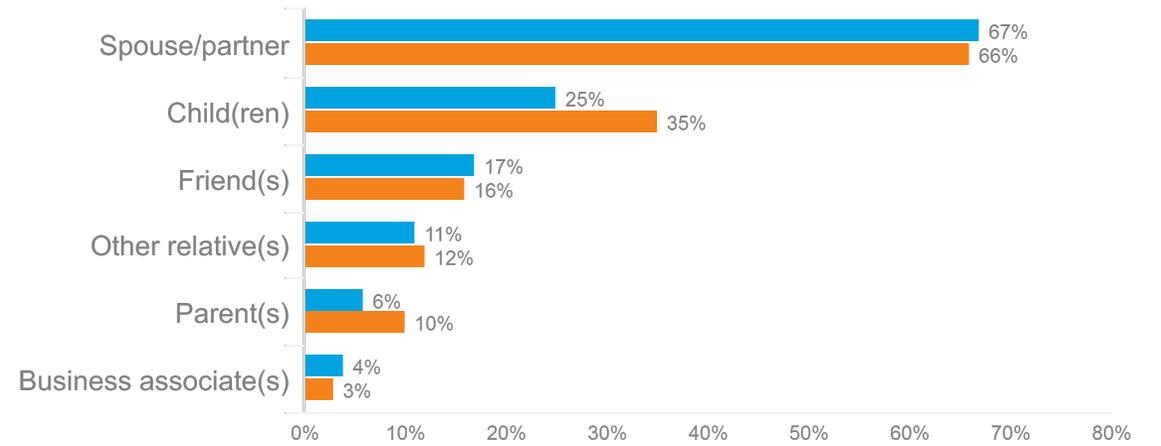
Percent Who Traveled Alone

■ Scottsdale ■ U.S. Norm



Composition of Immediate Travel Party

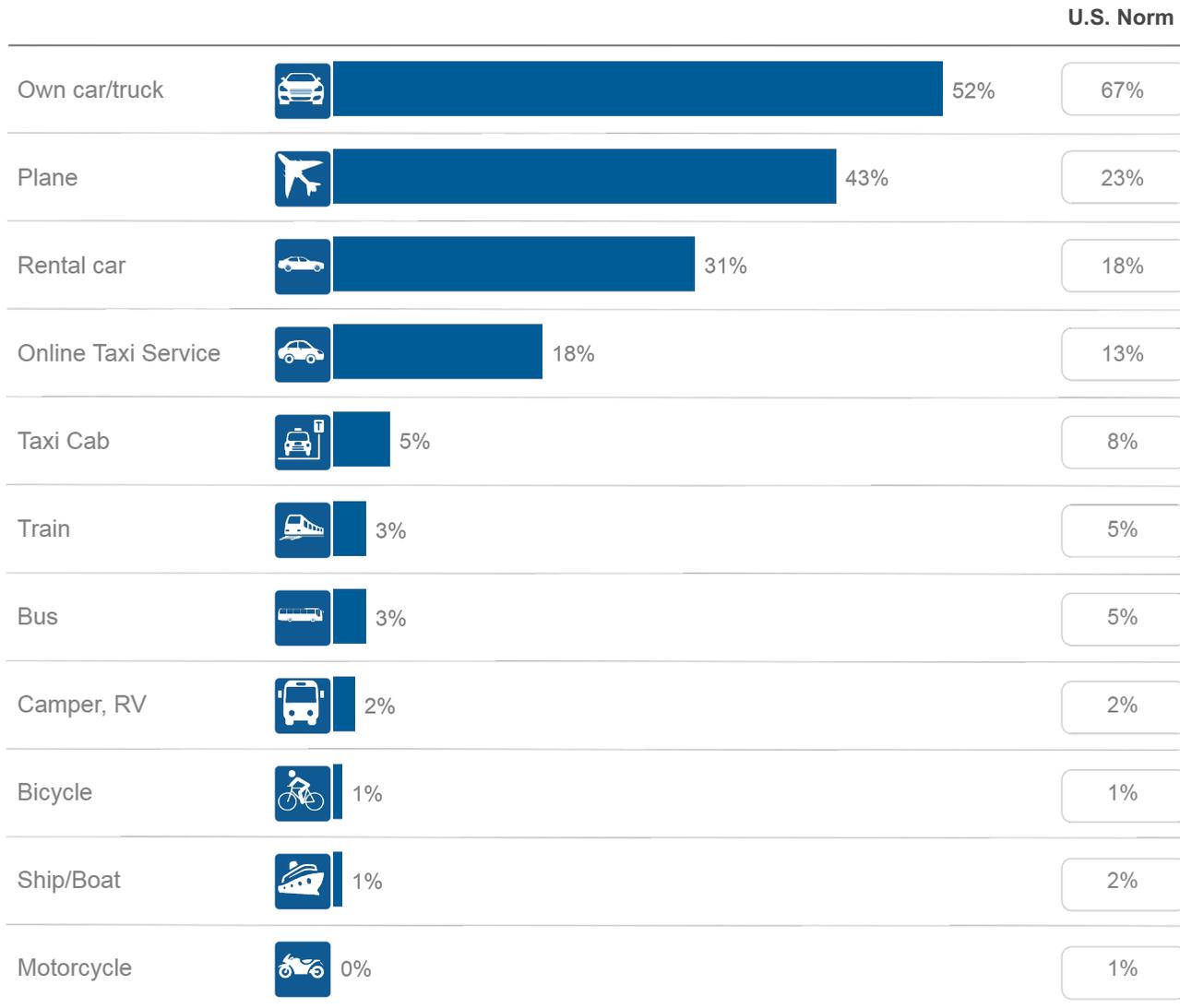
■ Scottsdale ■ U.S. Norm



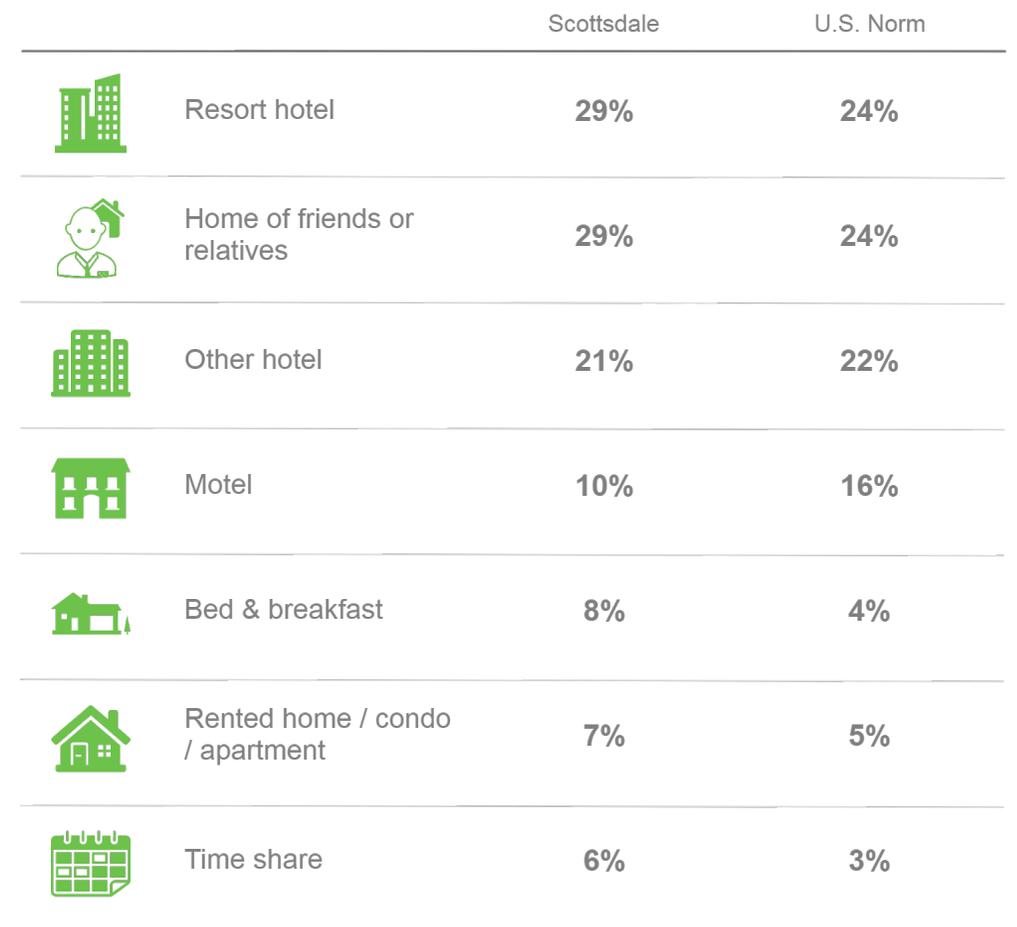
Scottsdale's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

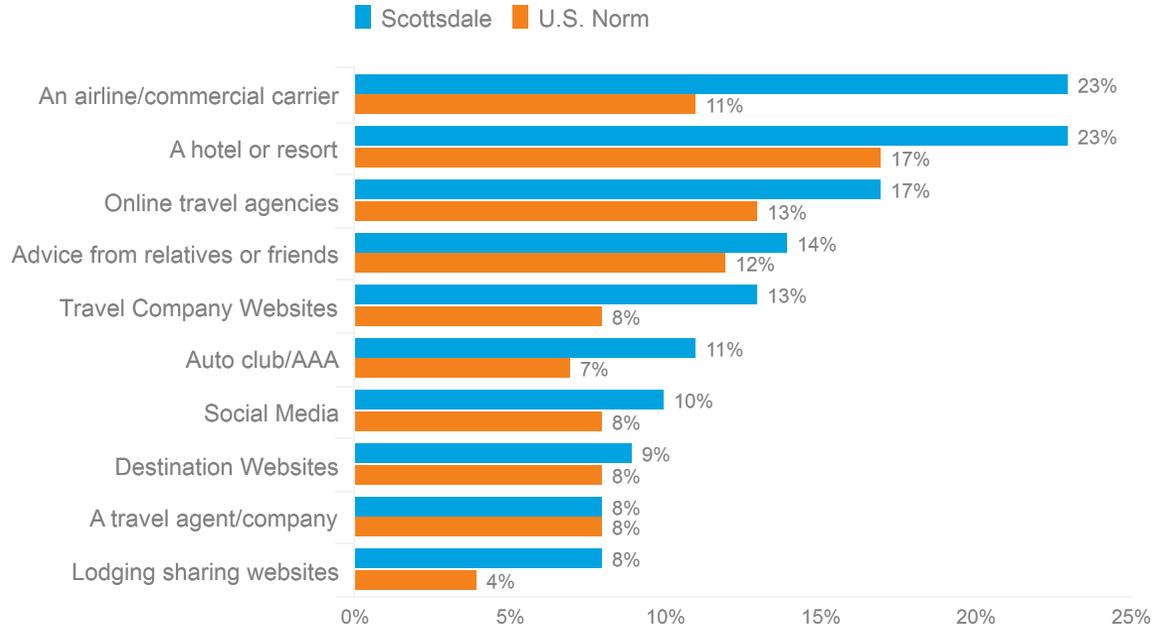
Transportation



Accommodations



Trip Planning Information Sources

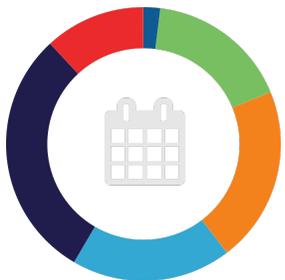


Devices Used for Trip Planning

Device	Scottsdale	U.S. Norm
Any device	89%	84%
Laptop	46%	43%
Desktop/Home computer	46%	40%
Smartphone	34%	33%
Tablet	24%	17%

Length of Trip Planning

Average Scottsdale: 89 days U.S. Norm: 88 days



Scottsdale

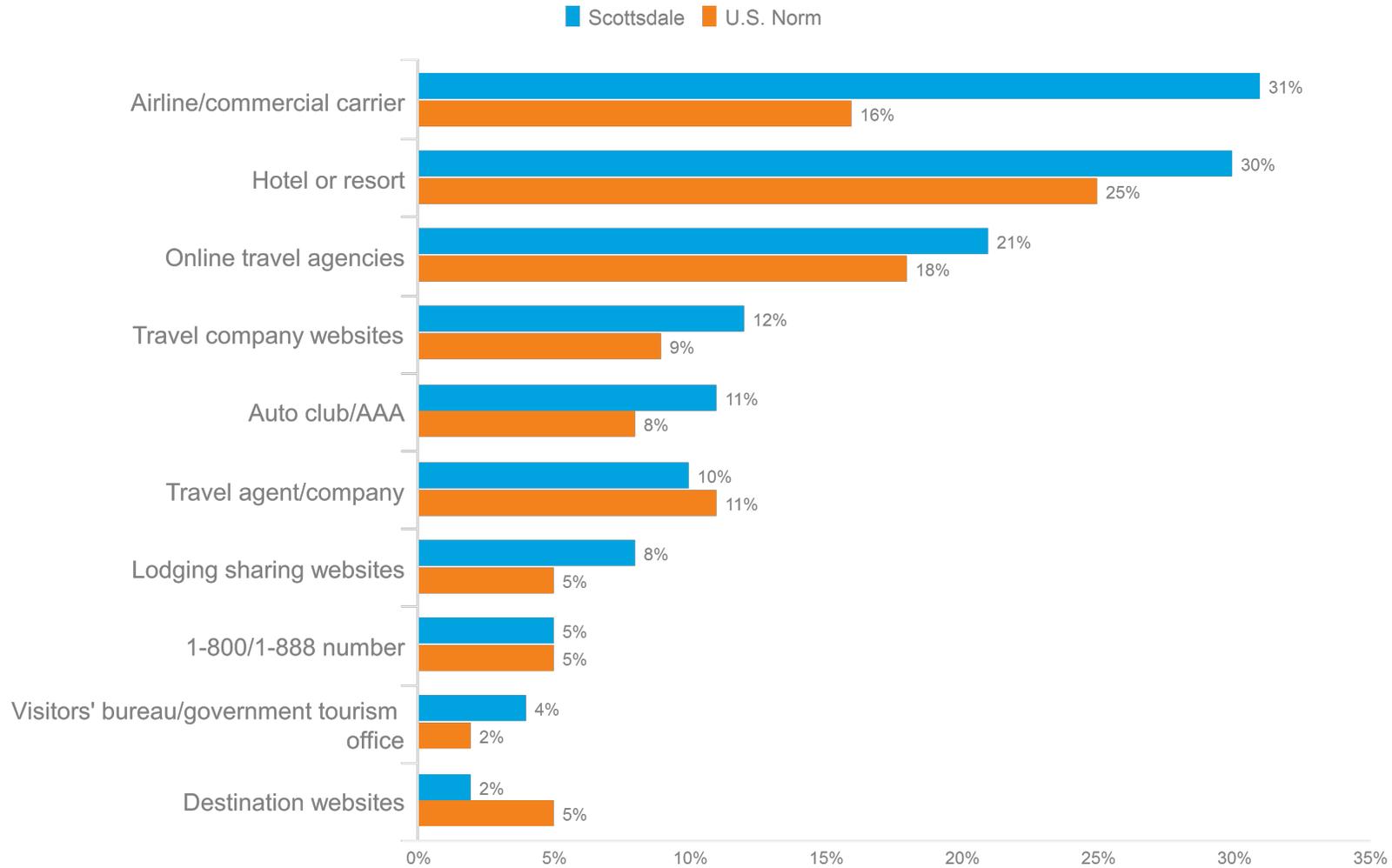
More than 1 year in advance	2%
6-12 months	17%
3-5 months	21%
2 months	19%
1 month or less	30%
Did not plan anything in advance	12%



U.S. Norm

More than 1 year in advance	4%
6-12 months	14%
3-5 months	17%
2 months	16%
1 month or less	33%
Did not plan anything in advance	14%

Method of Booking



Activities and Experiences (Top 10)

Shopping



40%

U.S. Norm
30%

Fine/upscale dining



25%

U.S. Norm
12%

Bar/nightclub



22%

U.S. Norm
15%

Landmark/historic site



18%

U.S. Norm
12%

Swimming



17%

U.S. Norm
14%

National/state park



17%

U.S. Norm
10%

Museum



16%

U.S. Norm
10%

Casino



13%

U.S. Norm
12%

Hiking/backpacking



13%

U.S. Norm
7%

Golf



11%

U.S. Norm
4%

Activities of Special Interest (Top 5)

Scottsdale

Historic places	31%
Cultural activities/Attractions	23%
Exceptional Culinary Experiences	18%
Winery Tours/Tasting	10%
Brewery Tours/Beer Tasting	9%

Activities of Special Interest (Top 5)

U.S. Norm

Historic places	22%
Cultural activities/Attractions	17%
Exceptional Culinary Experiences	12%
Brewery Tours/Beer Tasting	7%
Winery Tours/Tasting	6%

Online Social Media Use by Travelers

	Scottsdale	U.S. Norm
 Used any social media	69%	66%
 Posted travel photos or video online	35%	29%
 Read travel reviews	28%	26%
 Looked at travel-related photos or video online	25%	23%
 Accessed travel deals, news, events, or promotions	23%	20%

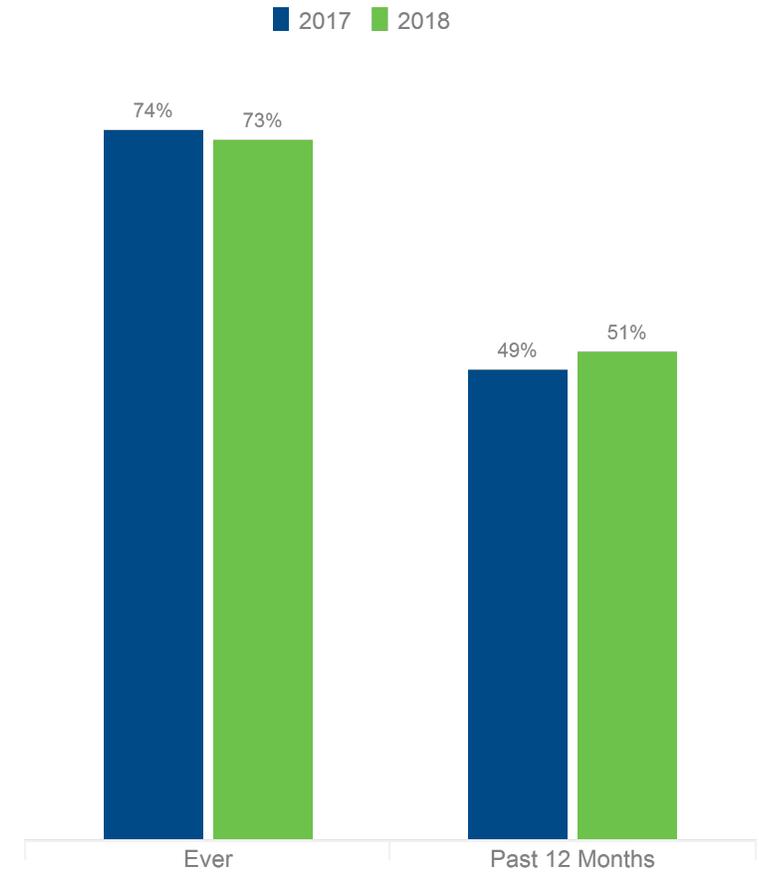
Devices Using During Trip

	Scottsdale	U.S. Norm
 Any device	88%	83%
 Smartphone	74%	68%
 Laptop	36%	31%
 Tablet	32%	26%

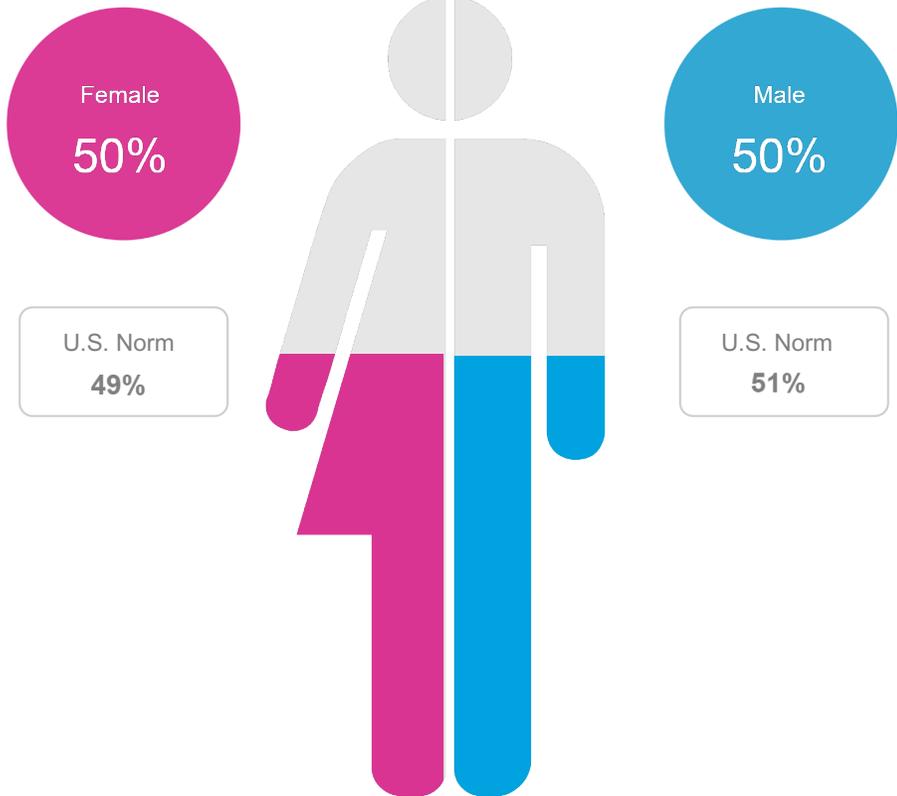
% Very Satisfied with Trip

	Overall trip experience	★★★★★☆☆☆☆	74%
	Quality of food	★★★★★☆☆☆☆	72%
	Safety and Security	★★★★★☆☆☆☆	71%
	Cleanliness	★★★★★☆☆☆☆	69%
	Quality of accommodations	★★★★★☆☆☆☆	63%
	Friendliness of people	★★★★★☆☆☆☆	62%
	Sightseeing and attractions	★★★★★☆☆☆☆	55%
	Value for money	★★★★★☆☆☆☆	48%
	Music/nightlife/entertainment	★★★★★☆☆☆☆	48%

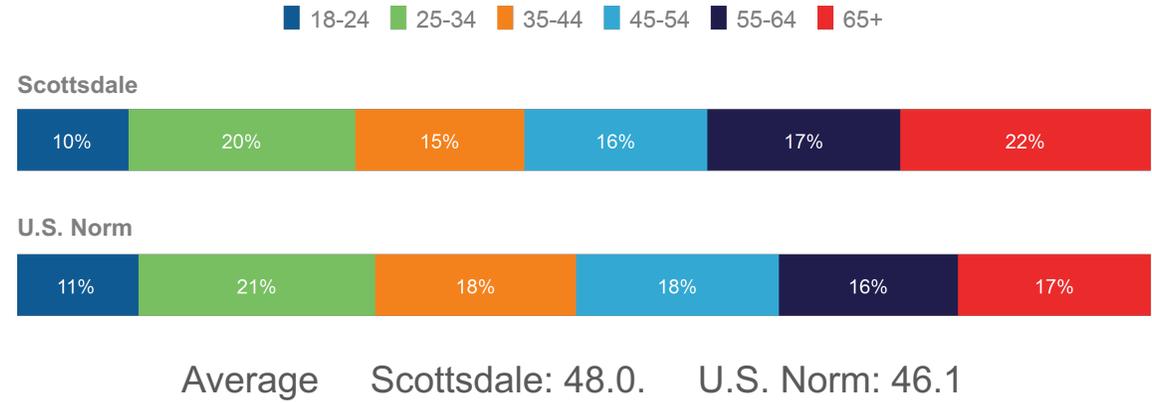
Past Visitation to Scottsdale



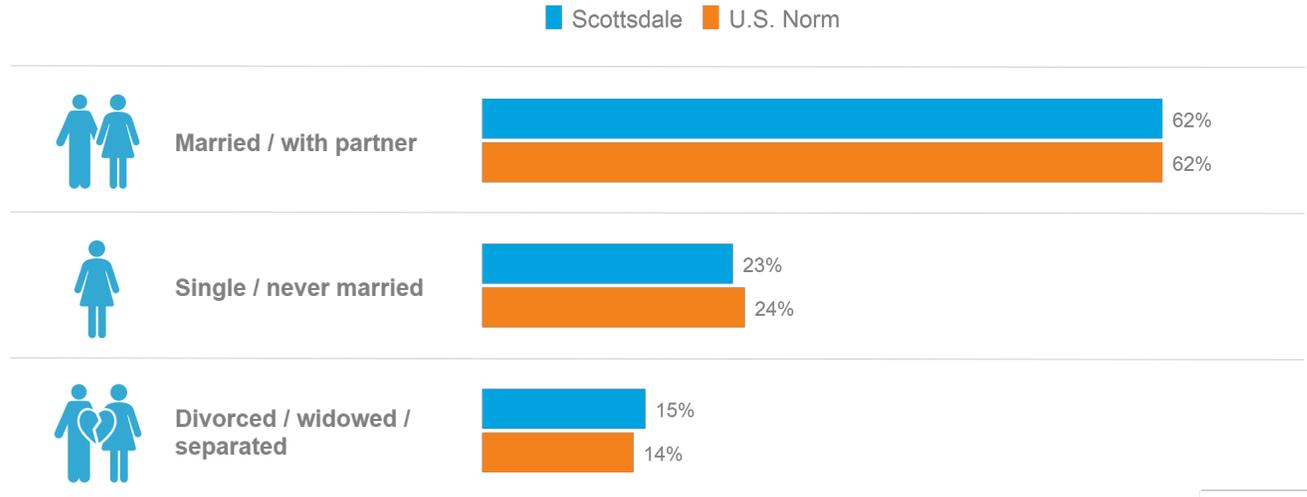
Gender



Age



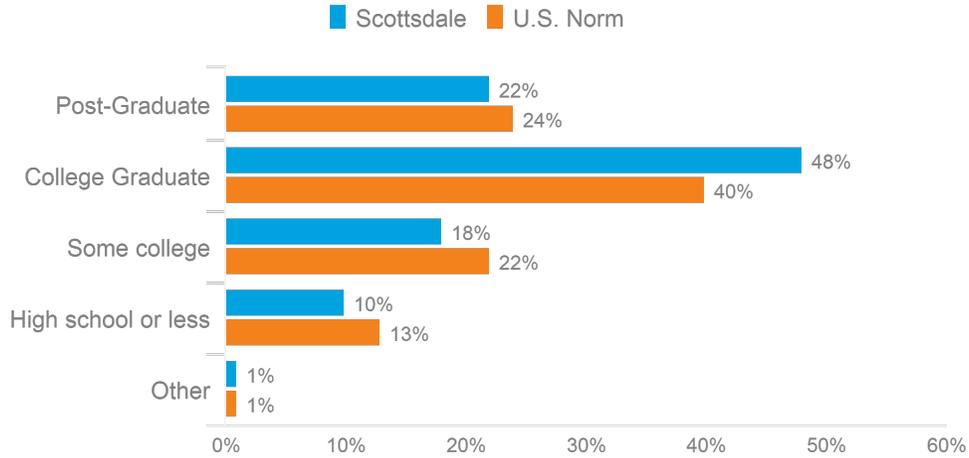
Marital Status



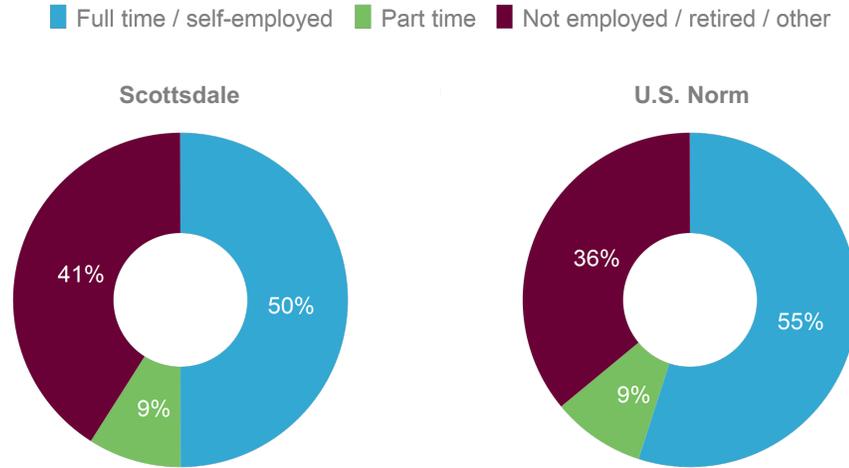
Demographic Profile of Overnight Scottsdale Visitors

Base: 2018 Overnight Person-Trips

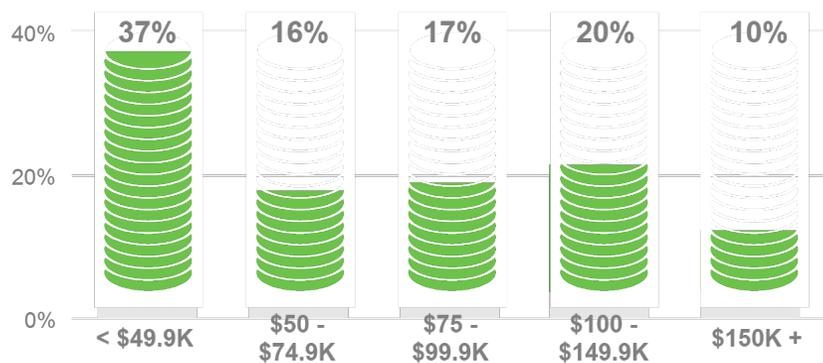
Education



Employment



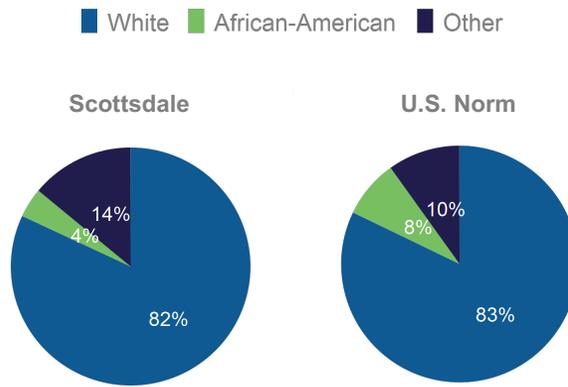
Household Income



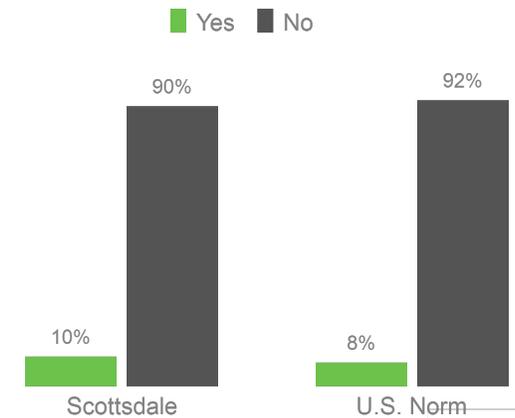
U.S. Norm: 38%, 22%, 16%, 16%, 7%

Average Scottsdale: \$82,000 U.S. Norm: \$74,000

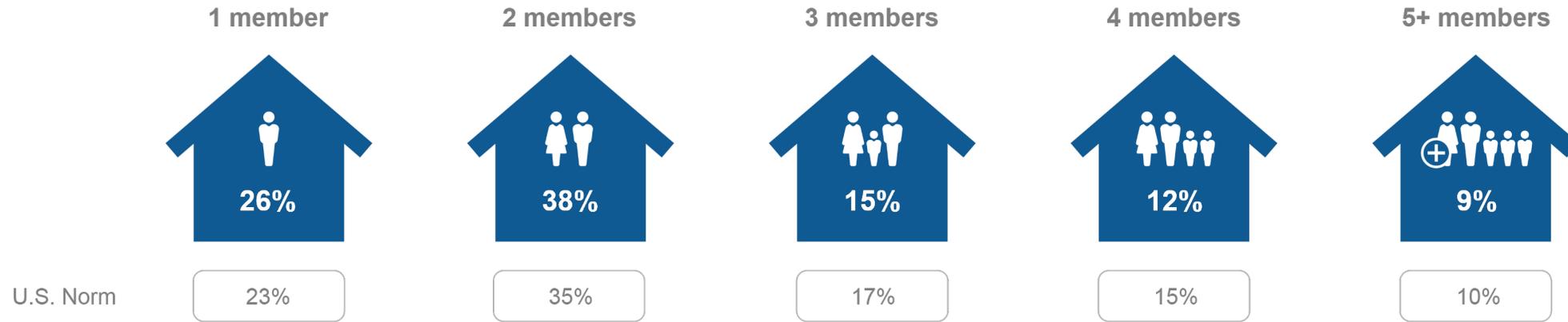
Race



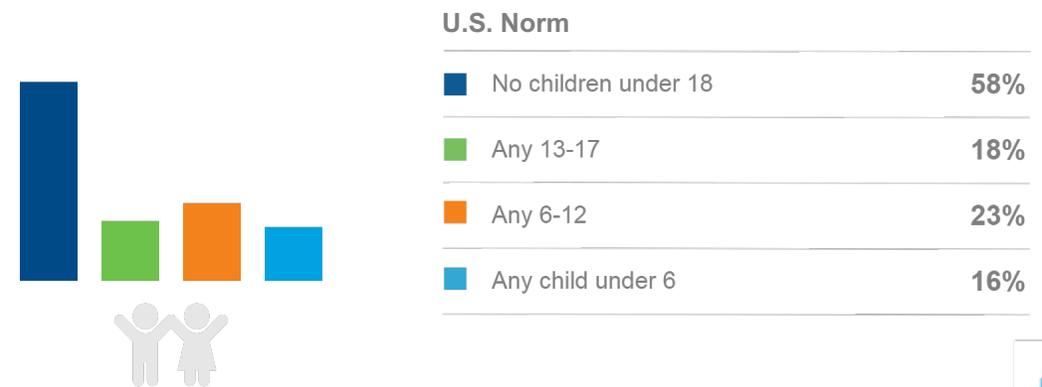
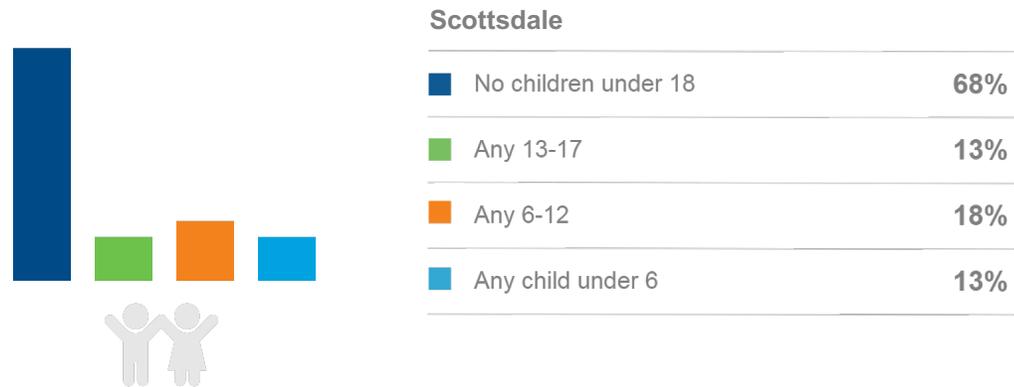
Hispanic Background



Household Size



Children in Household

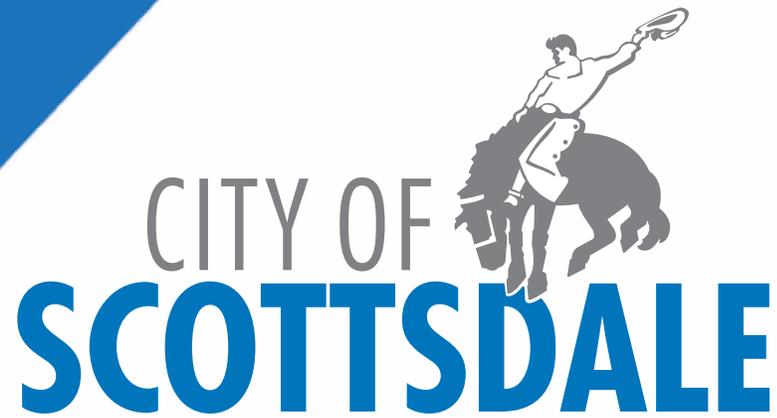




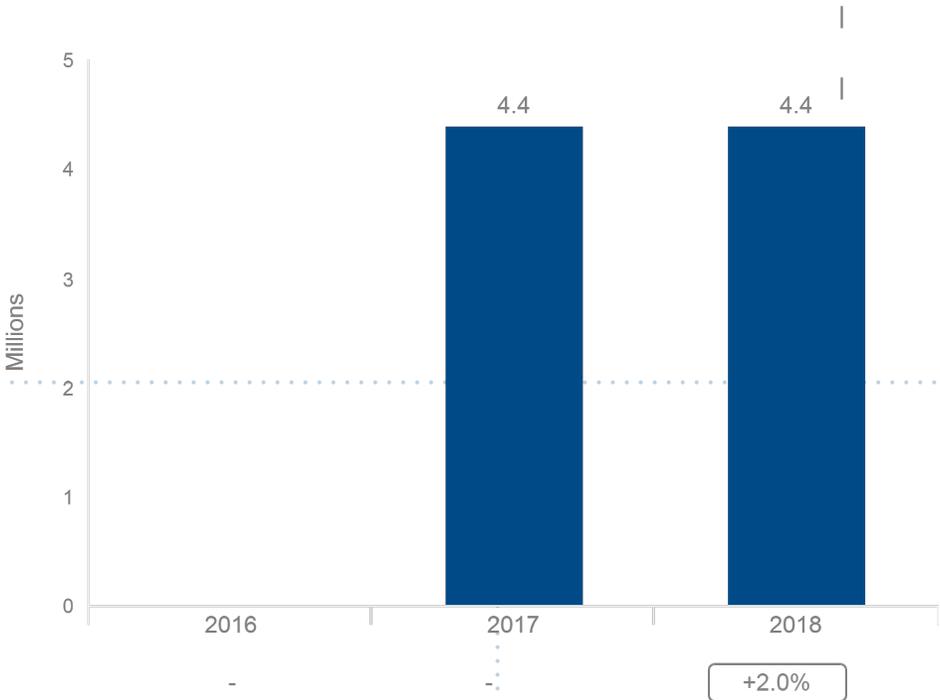
Visitor Research

Full Report – Day – 2017/2018

Prepared for
Scottsdale
June 2019



Day Trips to Scottsdale



Total Size of Scottsdale Day Domestic Travel Market

Total Person-Trips

9.1 Million

+2.2% vs. last year



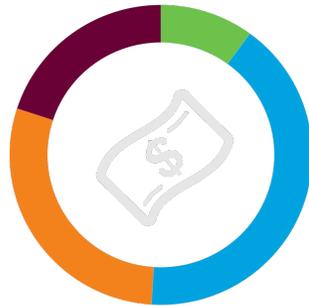
Day	49%	4.4 Million
Overnight	51%	4.6 Million

Domestic Day Expenditures - by Sector

Total Spending

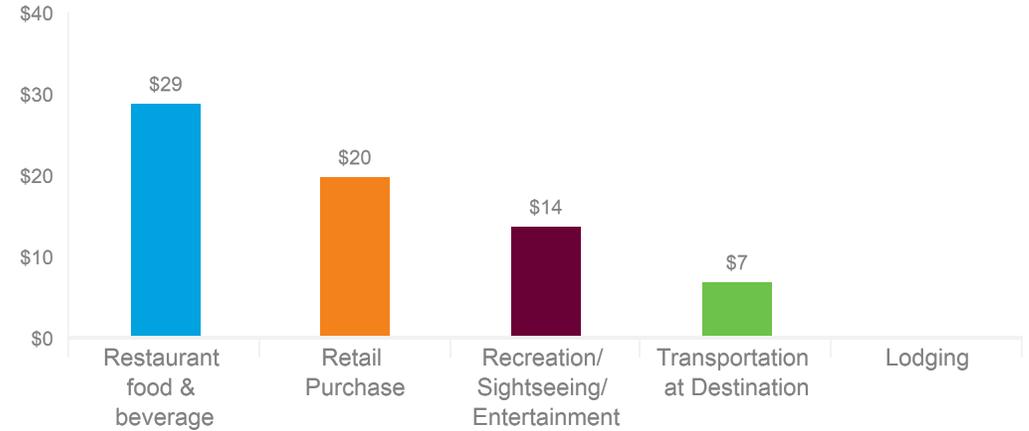
\$0.314 Billion

+5.4% vs. last year

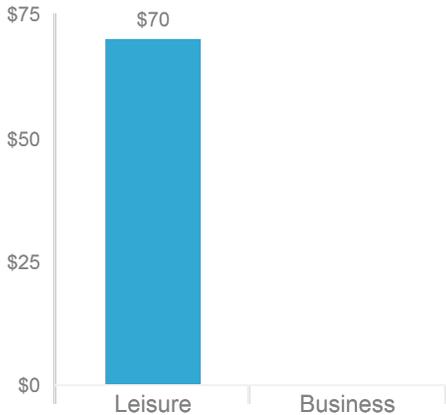


- Lodging
- | \$-
- Transportation at Destination
10% | \$32 Million
- Restaurant Food & Beverage
41% | \$130 Million
- Retail Purchase
29% | \$91 Million
- Recreation/Entertainment
20% | \$62 Million

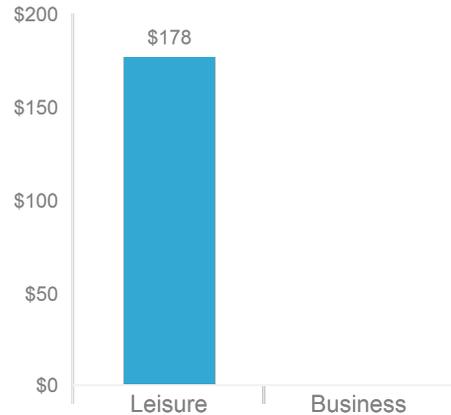
Average Per Person Expenditures on Domestic Day Trips - by Sector



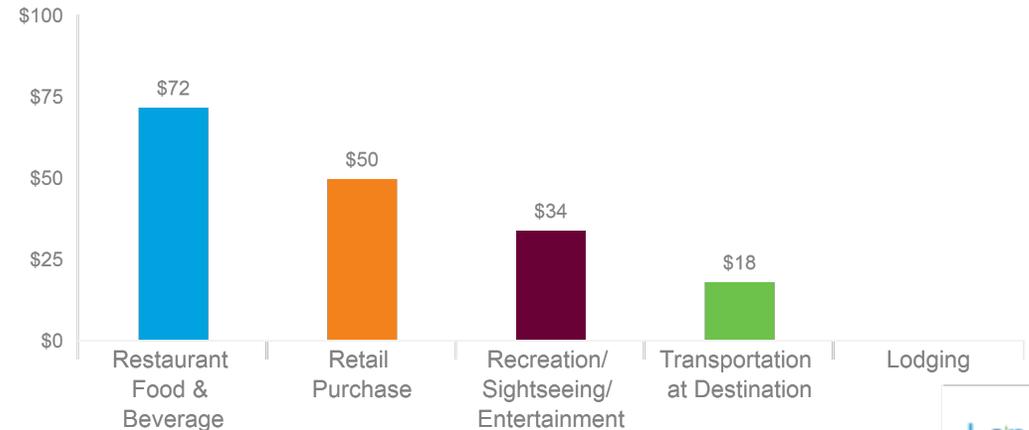
Average Per Person Expenditures on Domestic Day Trips - by Trip Purpose



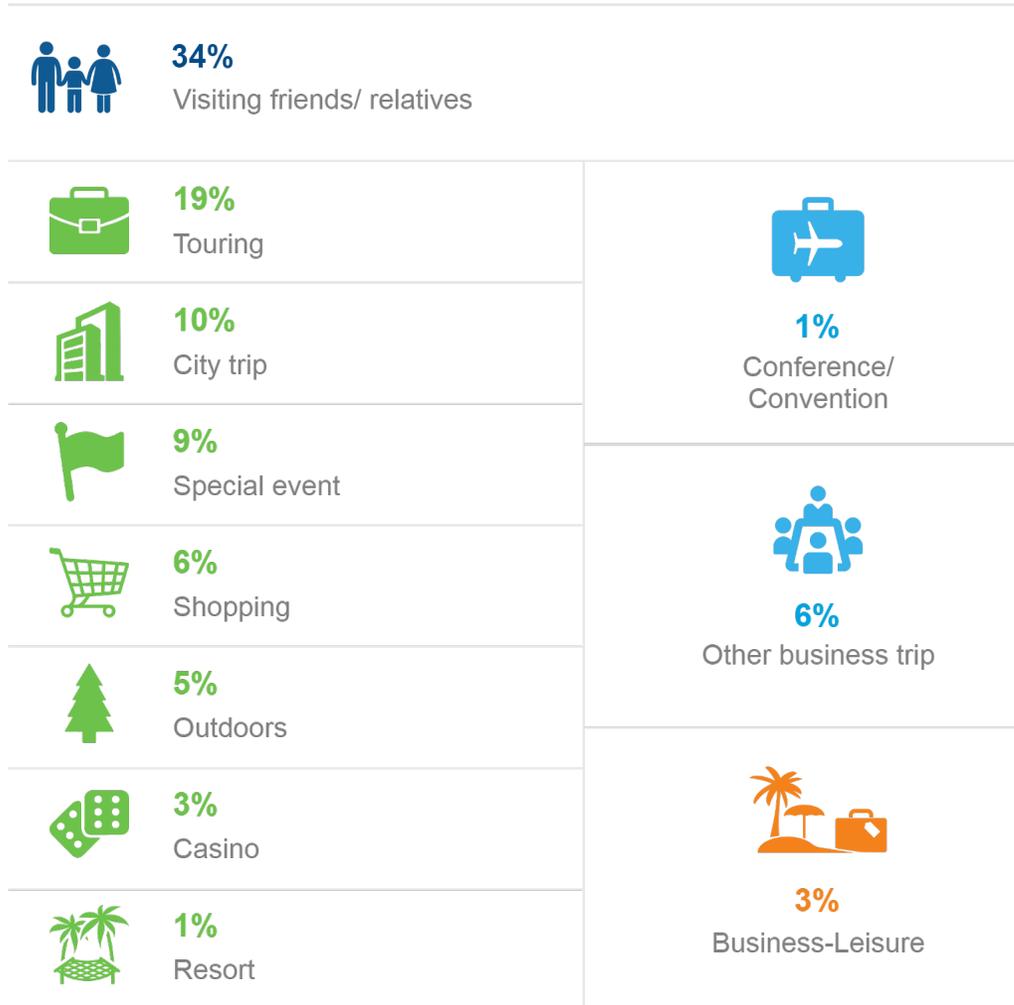
Average Per Party Expenditures on Domestic Day Trips - by Trip Purpose



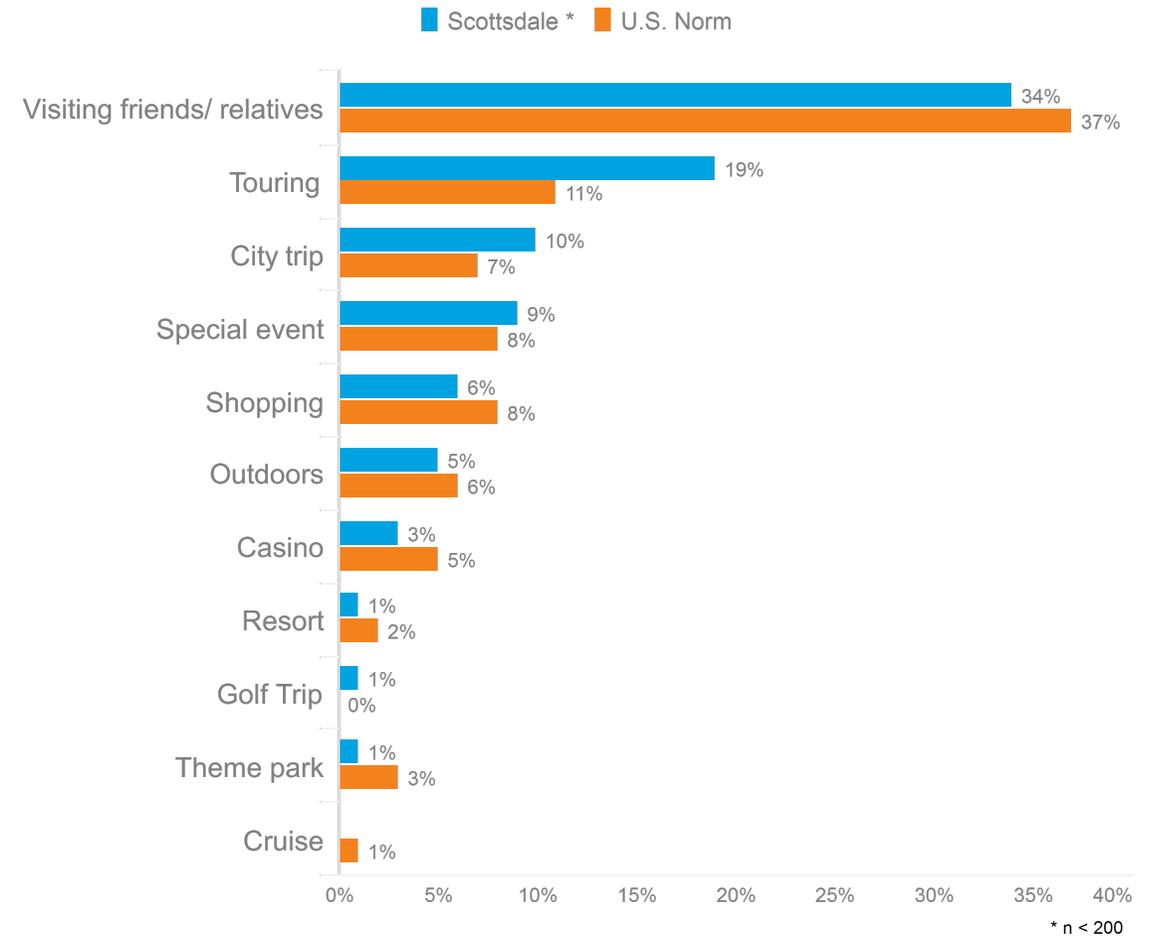
Average Per Party Expenditures on Domestic Day Trips - by Sector



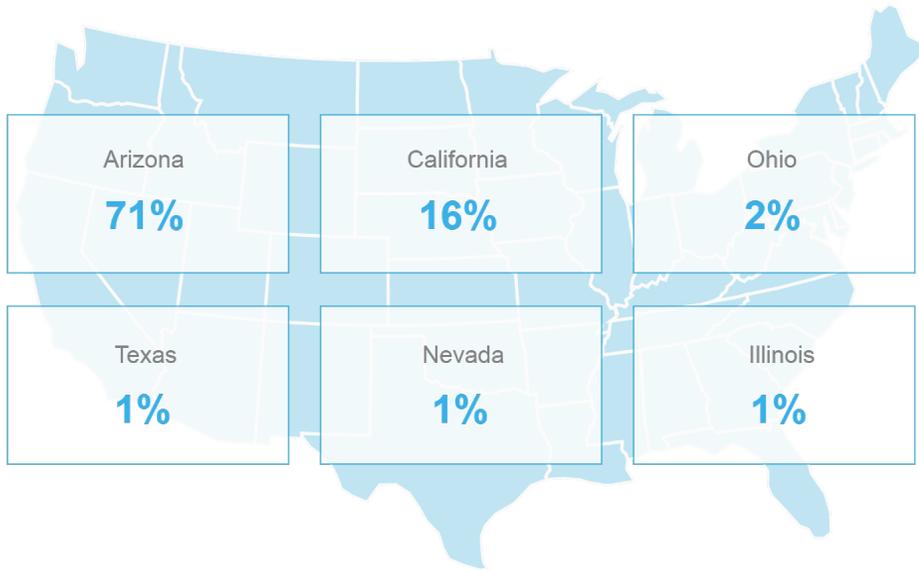
Main Purpose of Trip



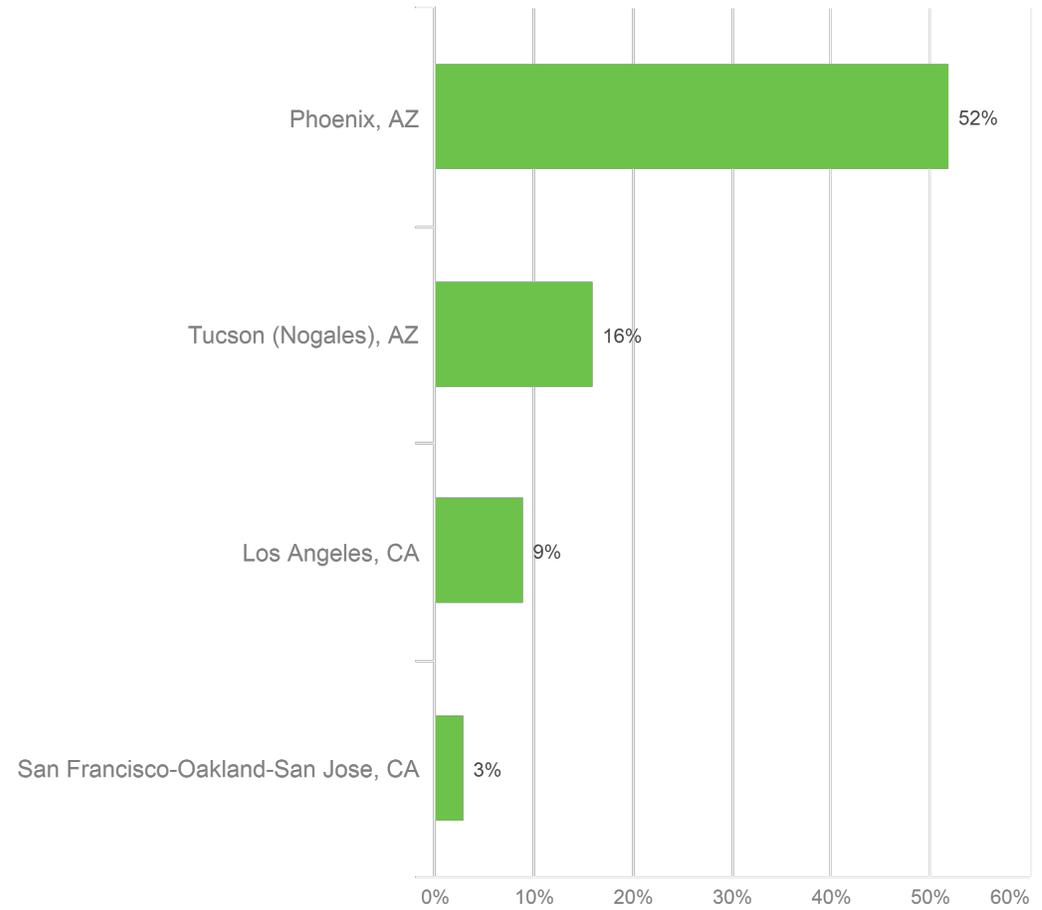
Main Purpose of Leisure Trip



State Origin Of Trip



DMA Origin Of Trip



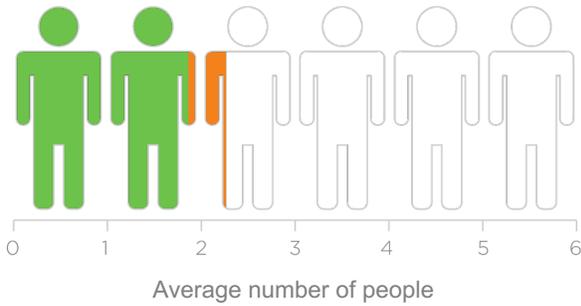
Season of Trip



Size of Travel Party

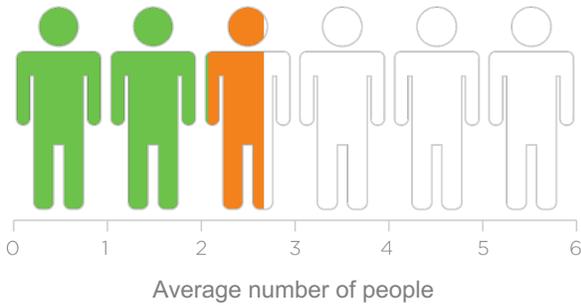
■ Adults ■ Children

Scottsdale



Total
2.3

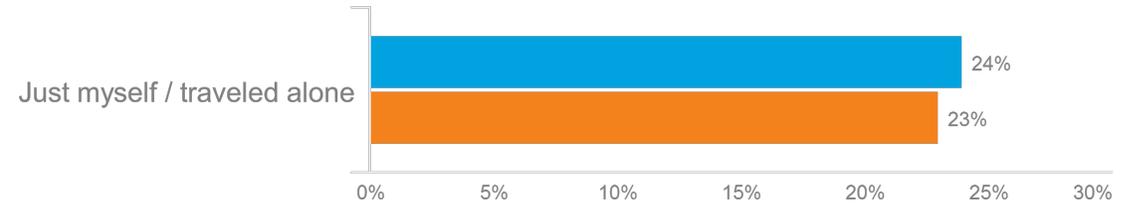
U.S. Norm



Total
2.6

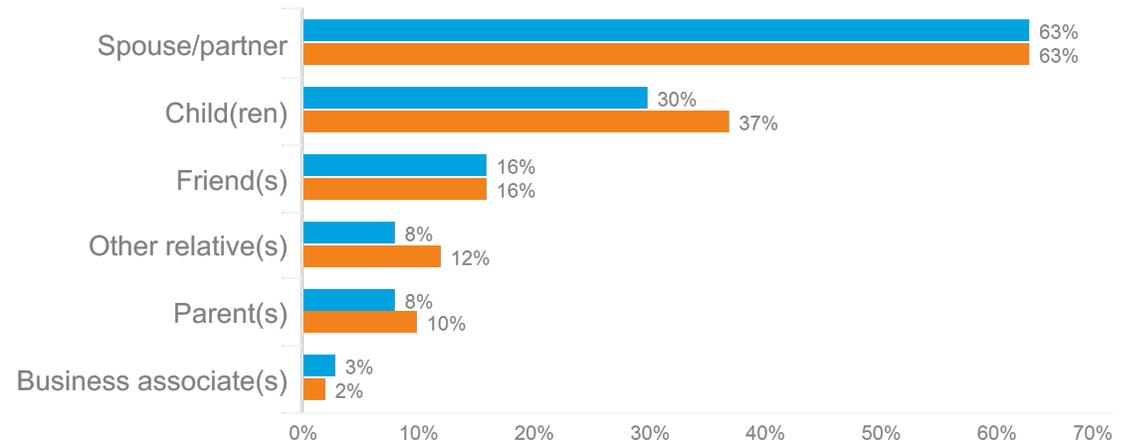
Percent Who Traveled Alone

■ Scottsdale ■ U.S. Norm



Composition of Immediate Travel Party

■ Scottsdale ■ U.S. Norm



Activities and Experiences (Top 10)

Shopping



35%

U.S. Norm
25%

Fine/upscale dining



17%

U.S. Norm
6%

Casino



12%

U.S. Norm
7%

Bar/nightclub



10%

U.S. Norm
5%

Hiking/backpacking



9%

U.S. Norm
5%

Museum



8%

U.S. Norm
7%

Art gallery



7%

U.S. Norm
3%

Landmark/historic site



7%

U.S. Norm
7%

Swimming



6%

U.S. Norm
5%

National/state park



6%

U.S. Norm
6%

Activities of Special Interest (Top 5)

Scottsdale

Historic places	21%
Cultural activities/Attractions	17%
Exceptional Culinary Experiences	14%
Brewery Tours/Beer Tasting	7%
Winery Tours/Tasting	7%

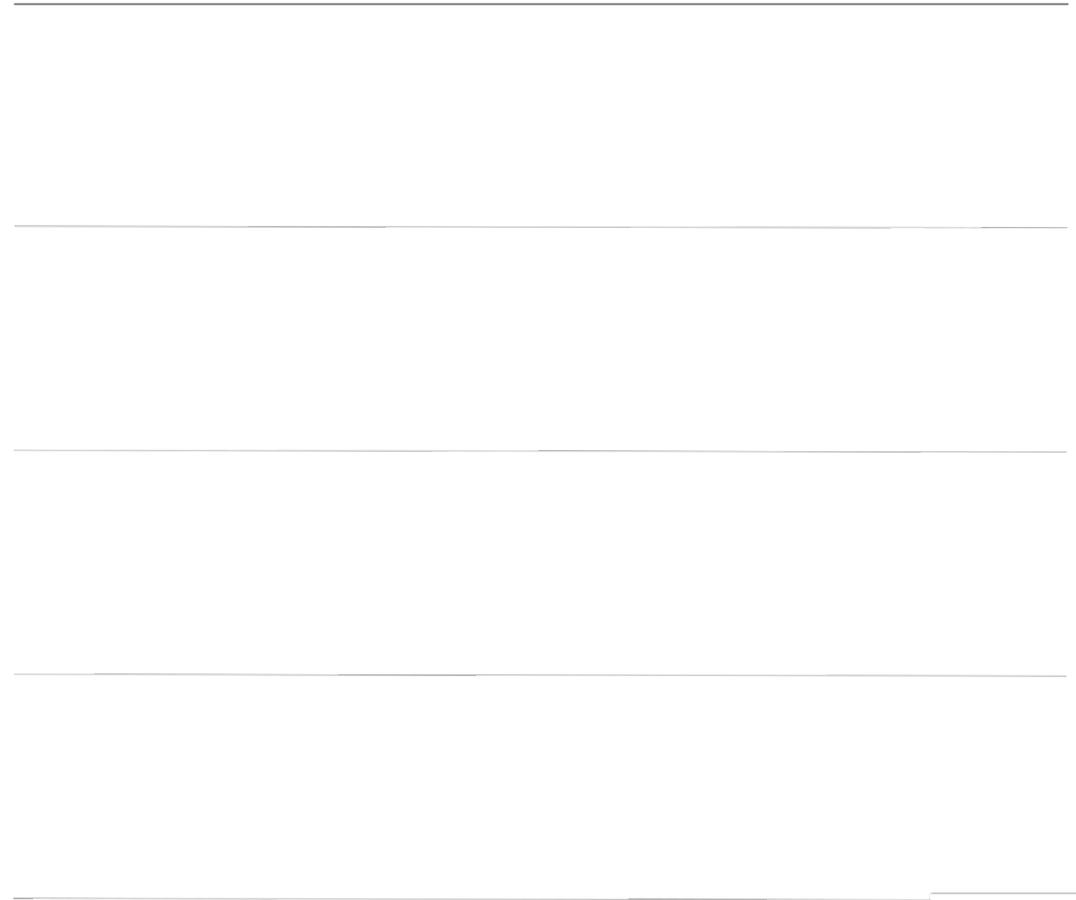
Activities of Special Interest (Top 5)

U.S. Norm

Historic places	17%
Cultural activities/Attractions	13%
Exceptional Culinary Experiences	8%
Brewery Tours/Beer Tasting	5%
Winery Tours/Tasting	5%

Online Social Media Use by Travelers

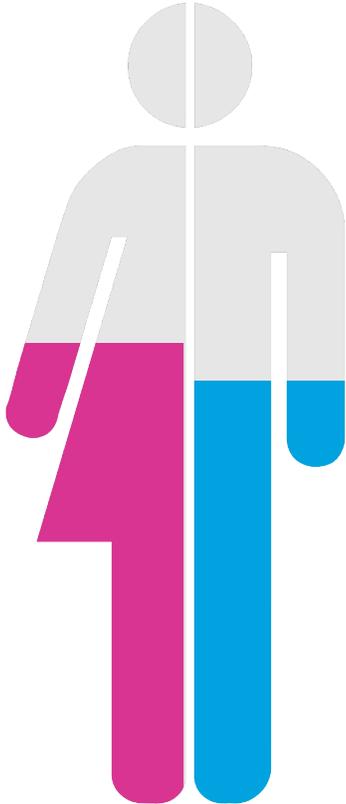
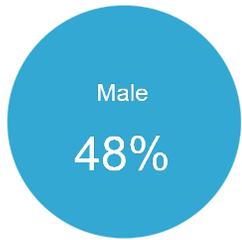
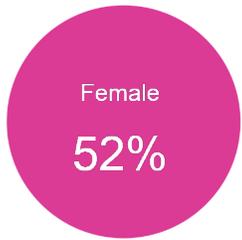
	Scottsdale	U.S. Norm
 <p>Used any social media</p>	75%	66%
 <p>Posted travel photos or video online</p>	32%	27%
 <p>Read travel reviews</p>	32%	25%
 <p>Looked at travel-related photos or video online</p>	29%	24%
 <p>Accessed travel deals, news, events, or promotions</p>	25%	21%



Demographic Profile of Day Scottsdale Visitors

Base: Day Person-Trips

Gender

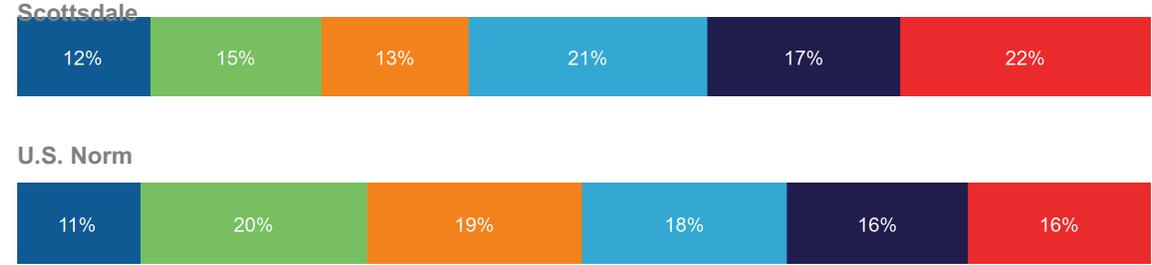


U.S. Norm
51%

U.S. Norm
49%

Age

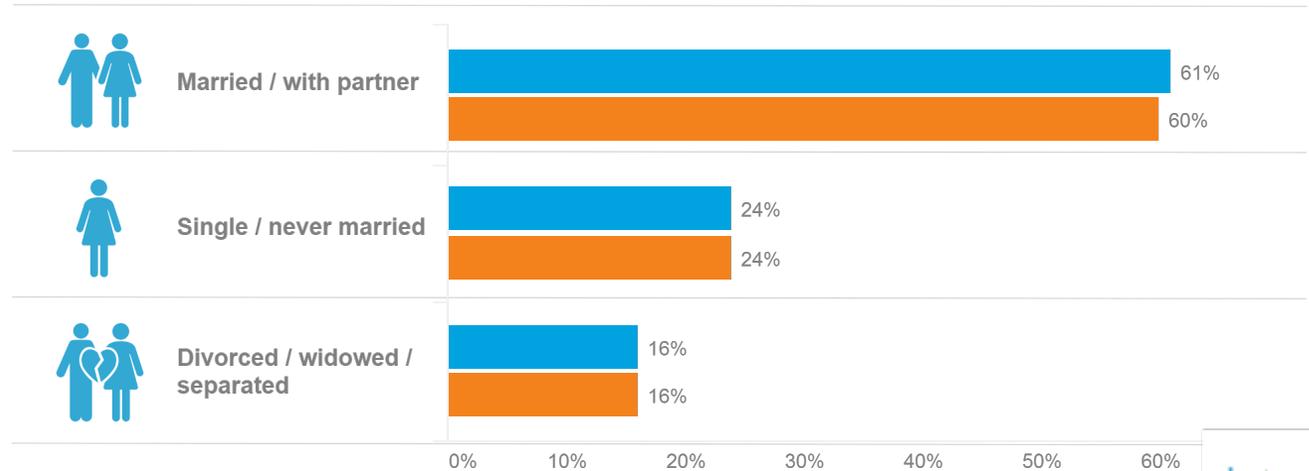
18-24 25-34 35-44 45-54 55-64 65+



Average Scottsdale: 48.8 U.S. Norm: 46.1

Marital Status

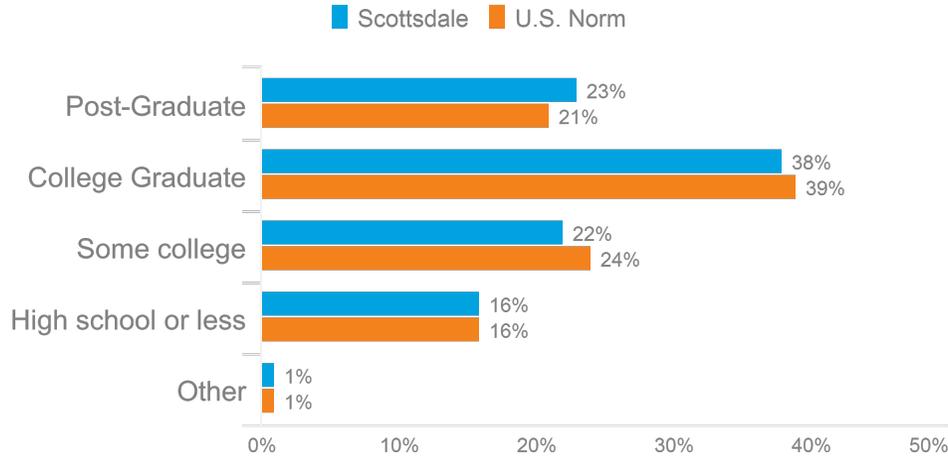
Scottsdale U.S. Norm



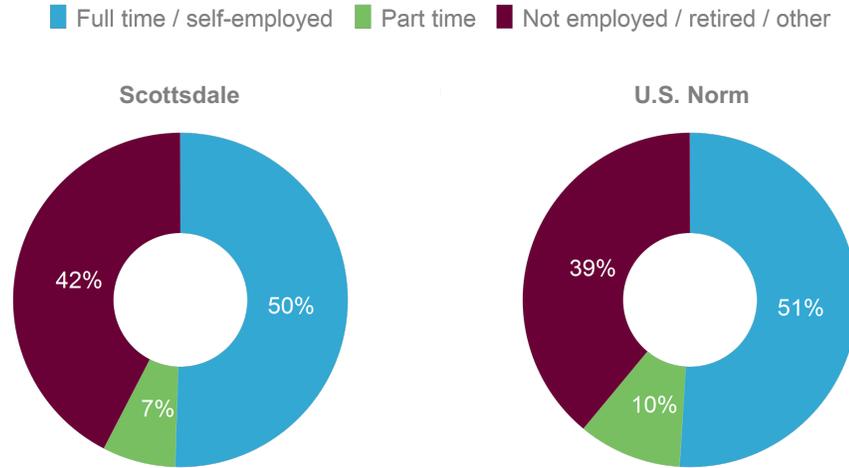
Demographic Profile of Day Scottsdale Visitors

Base: Day Person-Trips

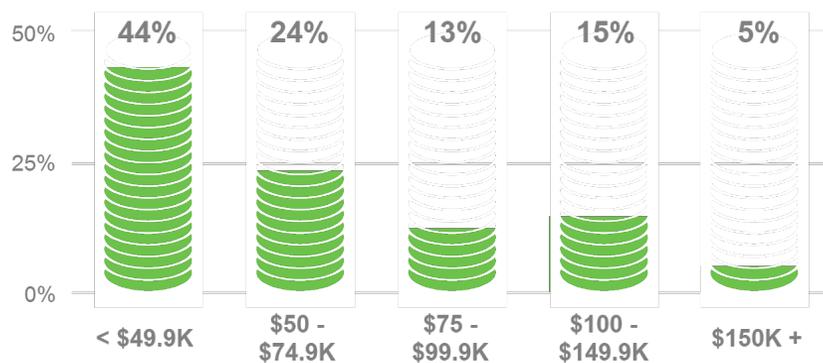
Education



Employment

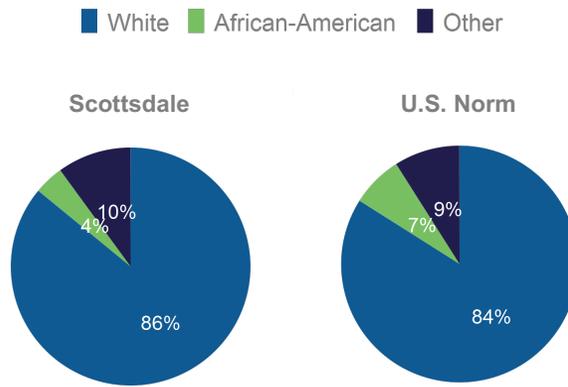


Household Income

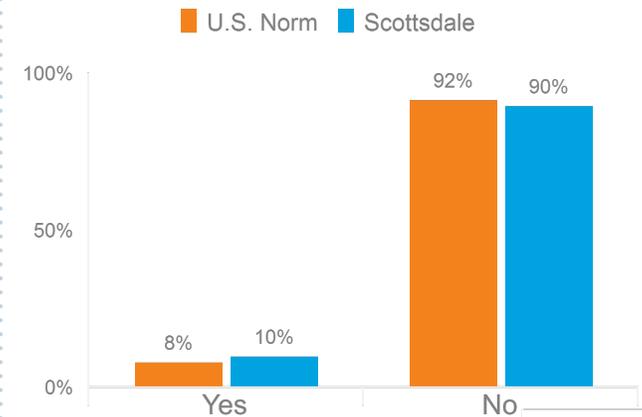


Average Scottsdale: \$72,000 U.S. Norm: \$67,000

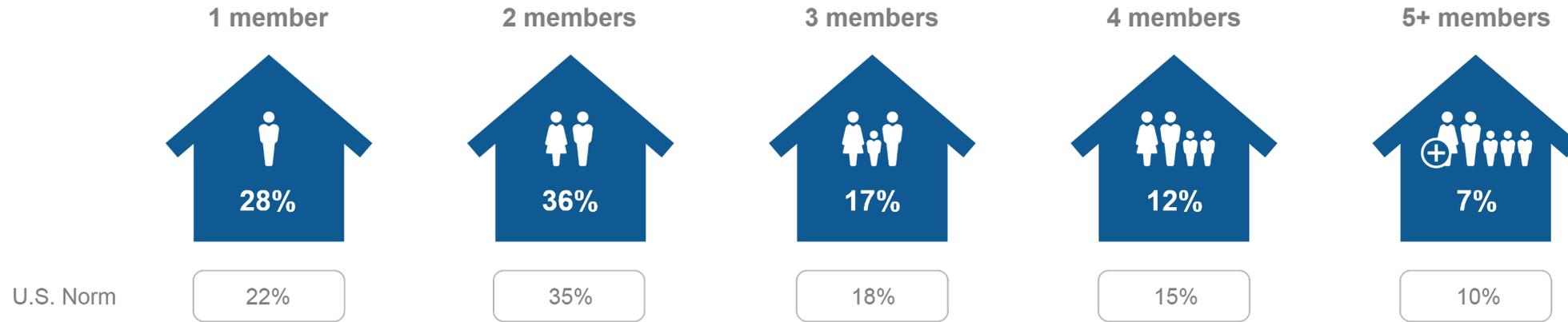
Race



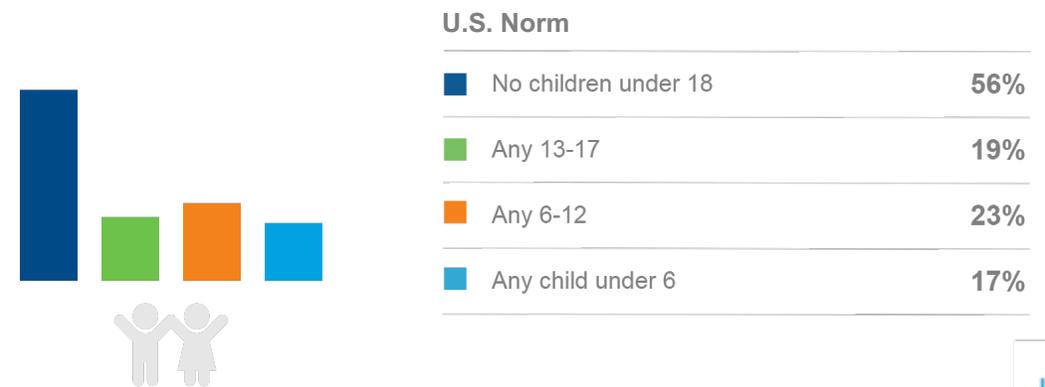
Hispanic Background



Household Size



Children in Household





Longwoods
INTERNATIONAL
40 YEARS TOGETHER