



2025 ADVERTISING ROI RESEARCH EXECUTIVE SUMMARY

*Conducted by Longwoods International, March 2026
In partnership with the City of Scottsdale and Experience Scottsdale*

KEY CONCLUSIONS

The City of Scottsdale and Experience Scottsdale partnered with Longwoods International to evaluate the effectiveness and return on investment of Experience Scottsdale’s tourism advertising in generating visitation, visitor spending, and reputational impact for Scottsdale. The resulting study underscored that Experience Scottsdale’s targeted campaign strategy delivered exceptional efficiency and return on investment.

- Experience Scottsdale’s advertising generated **\$214 in visitor spending for every \$1 invested by Experience Scottsdale** — nearly four times the industry benchmark for similarly sized destinations (\$56).
- Experience Scottsdale’s advertising generated **\$7 in city tax revenue for every \$1 invested**.
- The ads demonstrated exceptional efficiency, with only **\$1.46 in advertising spend required to generate a visit to Scottsdale**.
- Experience Scottsdale’s strategy of focusing on luxury and high-value experiences is resonating with affluent travelers, generating strong advertising awareness, with **76% of the target audience recalling at least one Experience Scottsdale ad**.
- The ads significantly improved perceptions of Scottsdale across key destination image and reputational measures, including a **25-point lift for the statement “Scottsdale is a good place to visit.”**

Advertising awareness and visitation levels among Scottsdale’s target audience remain competitive with peer destinations that operate with significantly larger marketing budgets, and tourism promotion continues to play a major role in shaping perceptions of Scottsdale, even among travelers who already held favorable impressions of the destination.

BACKGROUND & METHODOLOGY

The 2025 Longwoods International study evaluated Experience Scottsdale’s advertising campaigns in three key markets that drive the most visitation to luxury resorts in Scottsdale: New York City, Chicago and Los Angeles. Campaigns included social, video and audio advertising. This year’s study utilized a more targeted methodology aligned with Experience Scottsdale’s strategic focus on attracting high-value visitors. Unlike the 2023 study, which surveyed travelers aged 18 and older, the 2025 study focused specifically on travelers age 35+ with annual household incomes exceeding \$150,000. This refined audience reflects Experience Scottsdale’s strategy of prioritizing high-value visitors who deliver the greatest economic benefit to the community.

Longwoods International noted the analysis takes a highly conservative approach, measuring only incremental visitation and spending directly influenced by Experience Scottsdale’s advertising while controlling for trips that would have occurred regardless of advertising exposure. Longwoods International

noted that three-figure tourism advertising ROIs are extremely rare among destination marketing organizations and expressed strong confidence in Scottsdale's results given the study's conservative methodology.

The research also measured advertising awareness, campaign influence, destination image, competitive positioning and reputational impact among target travelers. The research examines three specific campaigns and is not reflective of the entirety of Experience Scottsdale's destination marketing that spans multiple domestic and international designated market areas.

ADDITIONAL STUDY DETAILS

Advertising Performance

- Experience Scottsdale's campaigns achieved strong awareness levels among affluent travelers age 35+ in Scottsdale's primary advertising markets with 76% of the target audience recalling seeing at least one Experience Scottsdale ad.
- Advertising awareness remained competitive with benchmark destinations despite Scottsdale operating with a substantially smaller marketing budget. Benchmark ad awareness among comparable destinations averages 55%.
- Experience Scottsdale's refined targeting strategy improved efficiency by focusing media investments on travelers most likely to generate high-value visitation.
- The ads demonstrated exceptional cost efficiency, requiring just \$1.46 in advertising spend to generate a visit to Scottsdale.
- More travelers remembered at least one social ad (73%), followed by video (69%), and audio (55%) ads. Travelers recalled messages across multiple media channels, increasing likelihood of conversion.

Brand Impact

- Advertising exposure generated a 25-point increase in agreement with the statement "Scottsdale is a good place to visit," demonstrating the advertising's ability to meaningfully strengthen already-positive perceptions.
- Longwoods International noted Experience Scottsdale's luxury-focused campaigns are effectively changing opinions and elevating perceptions of the destination among affluent travelers, including among individuals who had not previously visited the destination.
- Most respondents said Scottsdale's ads clearly showcase the destination (88%), are appealing (85%), inspire visitation (82%), and highlight aspects important to them (79%).

Competitive Positioning

- Travelers who visited Scottsdale within the past two years rated the destination highly across key image and experiential attributes, reinforcing Scottsdale's strong visitor satisfaction and repeat visitation performance.
- Scottsdale's visitation and awareness metrics remain in line with competitive destinations despite many peer destinations operating with significantly larger advertising budgets.
- Scottsdale's emphasis on unique luxury experiences continues to differentiate the destination and resonate strongly with target audiences.
- Scottsdale outperforms Austin and Nashville in atmosphere, as well as Las Vegas and Nashville in sports and recreation. Scottsdale performs comparably with Palm Springs and Austin in sports and recreation, uniqueness and adult/family travel. San Diego overperforms Scottsdale in atmosphere, uniqueness and adult/family travel.
- Scottsdale outperforms the combined competitive set in five destination perceptions: good place to relax, great for golfers, great hiking, good for running, and affordable to eat there.

Destination Image

- Experience Scottsdale's ads positively impacted perceptions across a range of destination attributes and "hot button" measures most closely tied to destination selection. The greatest

reputation lift occurred in perceptions of Scottsdale as a “must-see destination,” “an exciting place,” and a destination where “vacation there is a real adventure.”

- Those exposed to the ads rated the destination higher than those unaware of the ads across all 10 hot buttons, reinforcing the important role advertising plays not only in driving visitation but also in strengthening Scottsdale’s overall reputation and positioning.

Economic Development Halo Effect

- To determine the “halo effect” of Experience Scottsdale’s campaign, the study examined consumers’ ratings of Scottsdale on economic development image attributes by comparing those who had not seen the campaign or visited Scottsdale with those who did see the tourism ads and/or visited. In every case, Experience Scottsdale’s ads significantly improved the image of Scottsdale for a wide range of economic development objectives.
- Consumers who recalled Experience Scottsdale’s ads were not only more likely to visit, but also more likely to view Scottsdale as a good place to live, work, start a business, attend college, purchase a vacation home, and retire.
- Seeing the ads improved perceptions of Scottsdale by 10 to 27 points across all economic development objectives. The largest lift of 27 points was the impression of Scottsdale as “a good place to start a career,” followed by a 25-point lift as “a good place to start a business.”
- Visitation is tied to Scottsdale’s reputation, and according to Longwoods International, the best way to improve that visitation and reputation is through promotion. The combined impact of advertising exposure and visitation improved perceptions of Scottsdale between 20 and 41 points across all economic development objectives.

CONTACT

For additional information on the methodology and results of the study, please contact:

- Experience Scottsdale: Rachel Pearson, Vice President of Community & Government Affairs, 480-429-2259, rpearson@experiencescottsdale.com
- City of Scottsdale: Steve Geiogamah, Tourism Development Manager, 480-312-4013, sgeiogamah@scottsdaleaz.gov