

Longwoods
INTERNATIONAL

2025 Travel USA®

Scottsdale



Who We Are

About Longwoods International



Established in 1978 as
a market research
consultancy

Headquartered in
Columbus, OH, and
Toronto, ON

Working with over 150
destinations and
brands

Specializing in tourism
market research since
1985



Volume & Expenditure Estimates

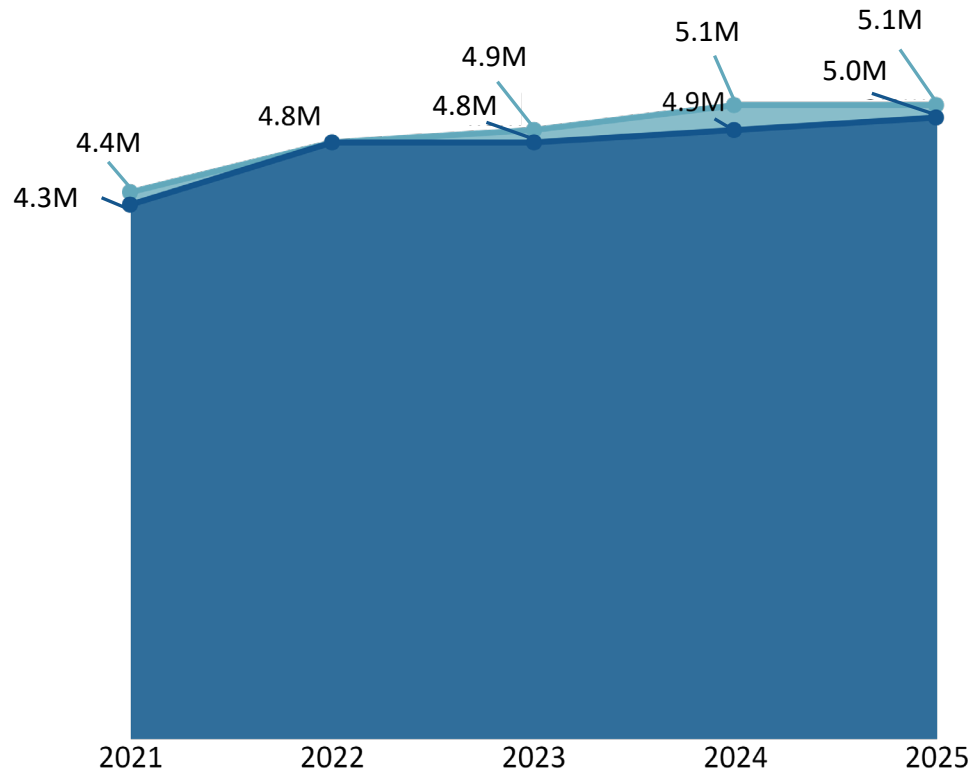
Scottsdale 2025



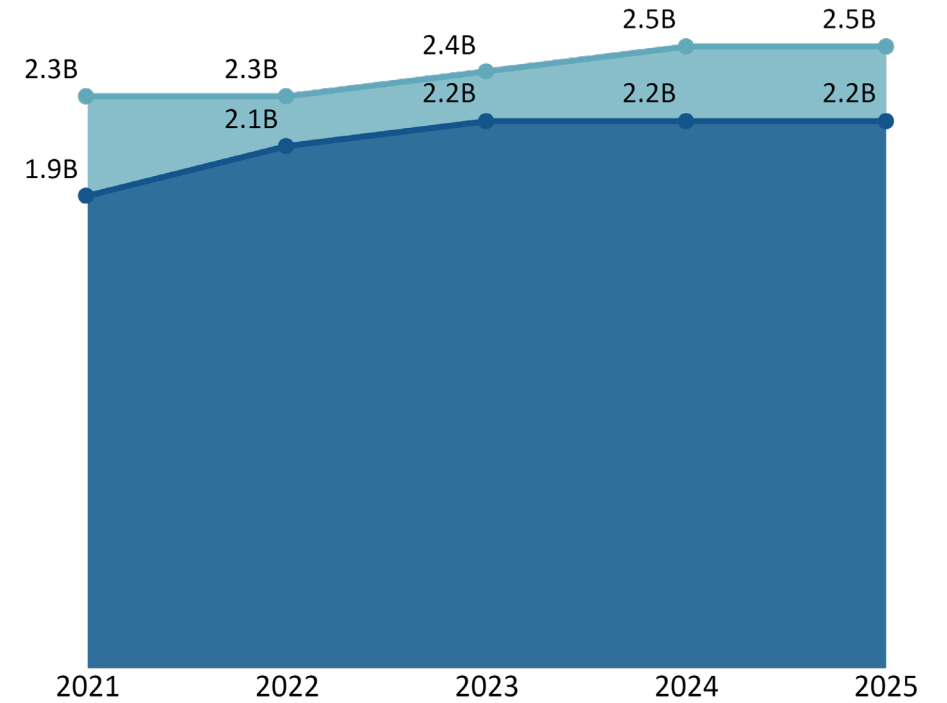
U.S. Travel Market Comparison

Total Overnight & Day Person-Trips

Scottsdale Person-Trips



U.S. Person-Trips



2025 Domestic Traveler Market

Overview of Total Volume & Expenditures for Scottsdale

Total Person-Trips  +1.3% YOY

10.1 Million

Total Spending  +3.9% YOY

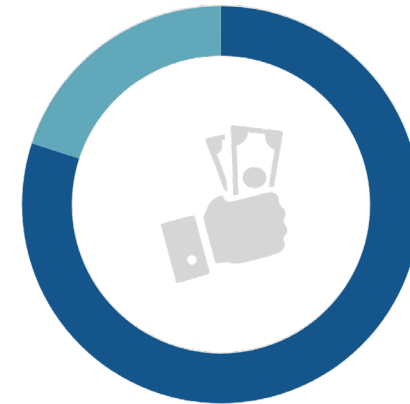
\$2.0 Billion

Day
5.1M



Overnight
5.0M

Day
\$0.4B



Overnight
\$1.6B



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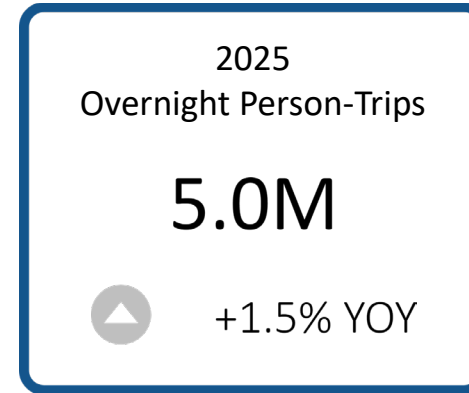
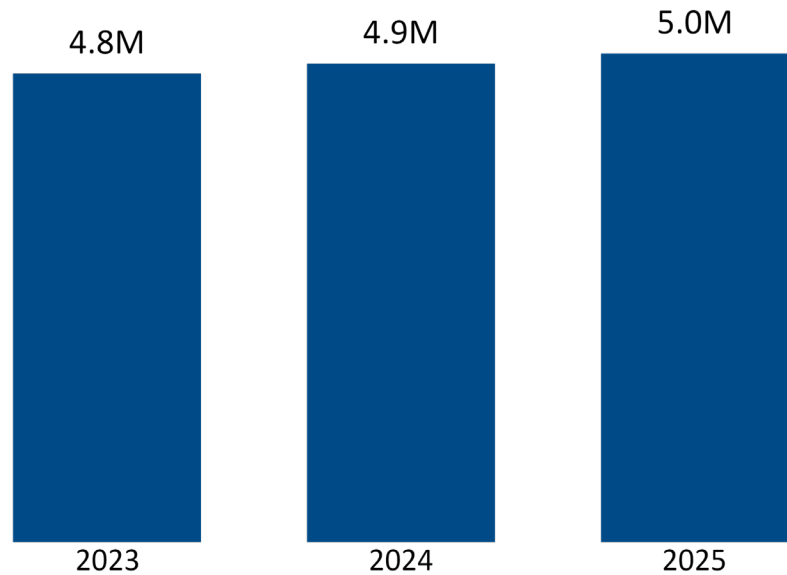
Travel USA®

Overnight Visitation

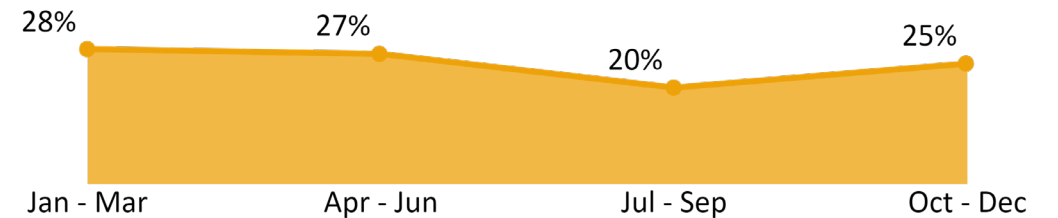
Volume & Expenditure Report

Overnight Trip Volume

YOY & Seasonality of Trip Comparisons – Scottsdale 2025



Seasonality of 2025 Overnight Person-Trips



Overnight Trip Expenditures

Total & Categorical Spending by 2025 Overnight Travelers in Scottsdale


Total Spending  +3.9% YOY

Average Per Person Spend:

\$1.648 Billion **\$329**


Lodging

\$732M

 +2.7% YOY Average Per Person: \$146


Restaurant Food & Beverage

\$378M

 +5.9% YOY Average Per Person: \$75


Retail Purchase

\$192M

 +3.8% YOY Average Per Person: \$38


Recreation/Entertainment

\$175M

 +6.0% YOY Average Per Person: \$35

Transportation at Destination

\$172M

 +2.8% YOY Average Per Person: \$34

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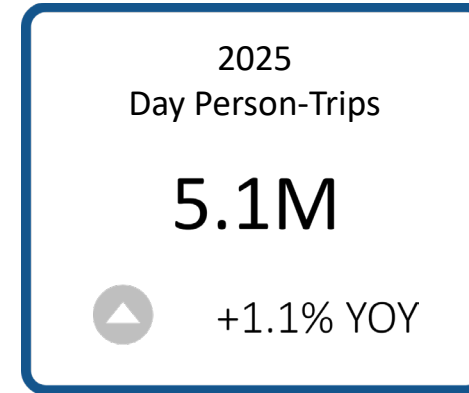
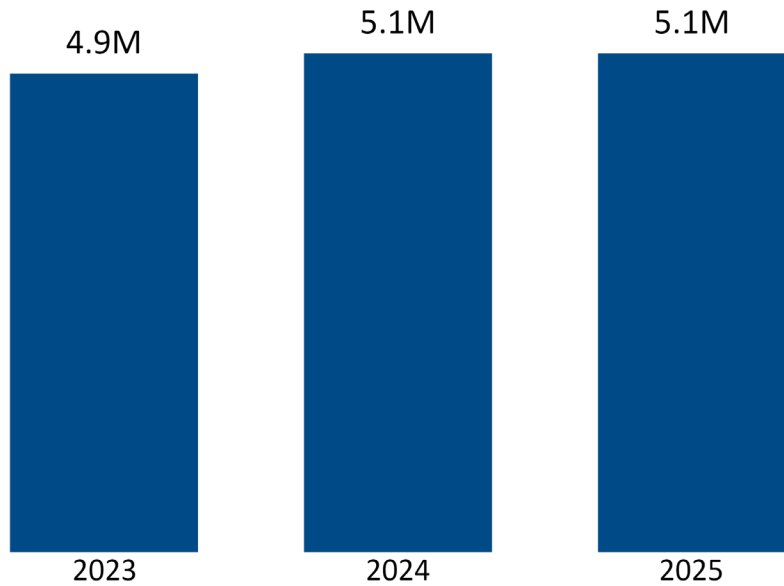
Day Visitation

Volume & Expenditure Report

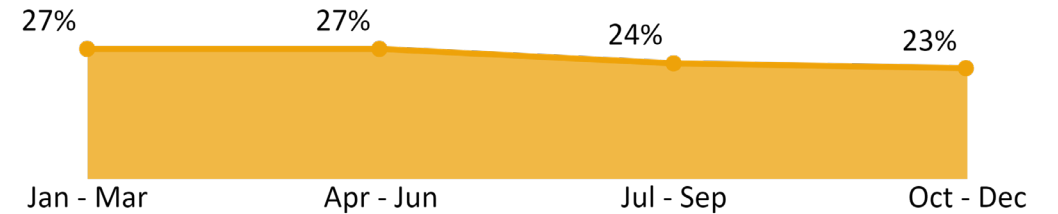


Day Trip Volume

YOY & Seasonality of Trip Comparisons – Scottsdale 2025



Seasonality of 2025 Day Person-Trips



Day Trip Expenditures

Total & Categorical Spending by 2025 Day Travelers in Scottsdale


Total Spending  +3.8% YOY

Average Per Person Spend:

\$0.401 Billion **\$78**

Restaurant Food & Beverage

\$161M

 +4.8% YOY Average Per Person: \$31


Retail Purchase

\$101M

 +2.9% YOY Average Per Person: \$20

Recreation/Entertainment

\$79M

 +4.7% YOY Average Per Person: \$15

Transportation at Destination

\$61M

 +1.6% YOY Average Per Person: \$12

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Travel USA®

Overnight Visitation

Scottsdale 2025



Travel USA[®] Overview

Methodology

Longwoods International began tracking domestic American travelers in 1985 and has conducted large-scale syndicated visitor research quarterly since 1990.

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.

Each quarter, Longwoods International invites a random, projectable sample of adult members (age 18+) from a major U.S. consumer panel to participate in the Travel USA[®] survey. Respondents are selected to ensure representativeness of the U.S. adult population.

For analysis, data were weighted on key demographic variables to adjust for any differences between the sample and U.S. population targets derived from the 2020 Census.

Scottsdale's base size for overnight trips in 2025:

808

This study yields a margin of error of $\pm 3\%$ at a 95% confidence level. Year-over-year (YOY) and U.S. Norm comparisons are considered statistically significant only when results meet or exceed this threshold.

See Reference Guide for additional information on weighted base calculation.

Pre-Trip

Traveler Profiles & Origins



State & DMA of Origin

Top Traveler Markets for Scottsdale – Overnight Trips 2025

	2025
Arizona	23%
California	15%
New York	7%
Texas	6%
Illinois	5%



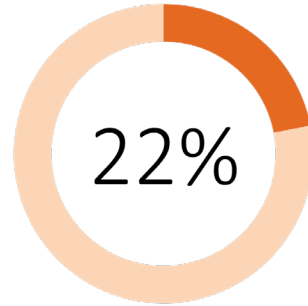
	2025
Phoenix, AZ	18%
Los Angeles, CA	10%
New York, NY	7%
Tucson (Nogales), AZ	4%
Chicago, IL	4%

Travel Party Composition

Solo Travelers, Children, & Pets – Overnight Trips 2025

Solo Travel
Parties

29%

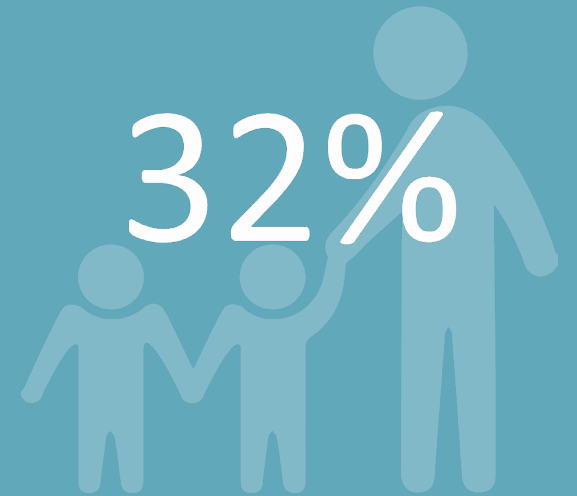


Travel Parties with Pets



Travel Parties
with Children

32%



Travel Party Composition

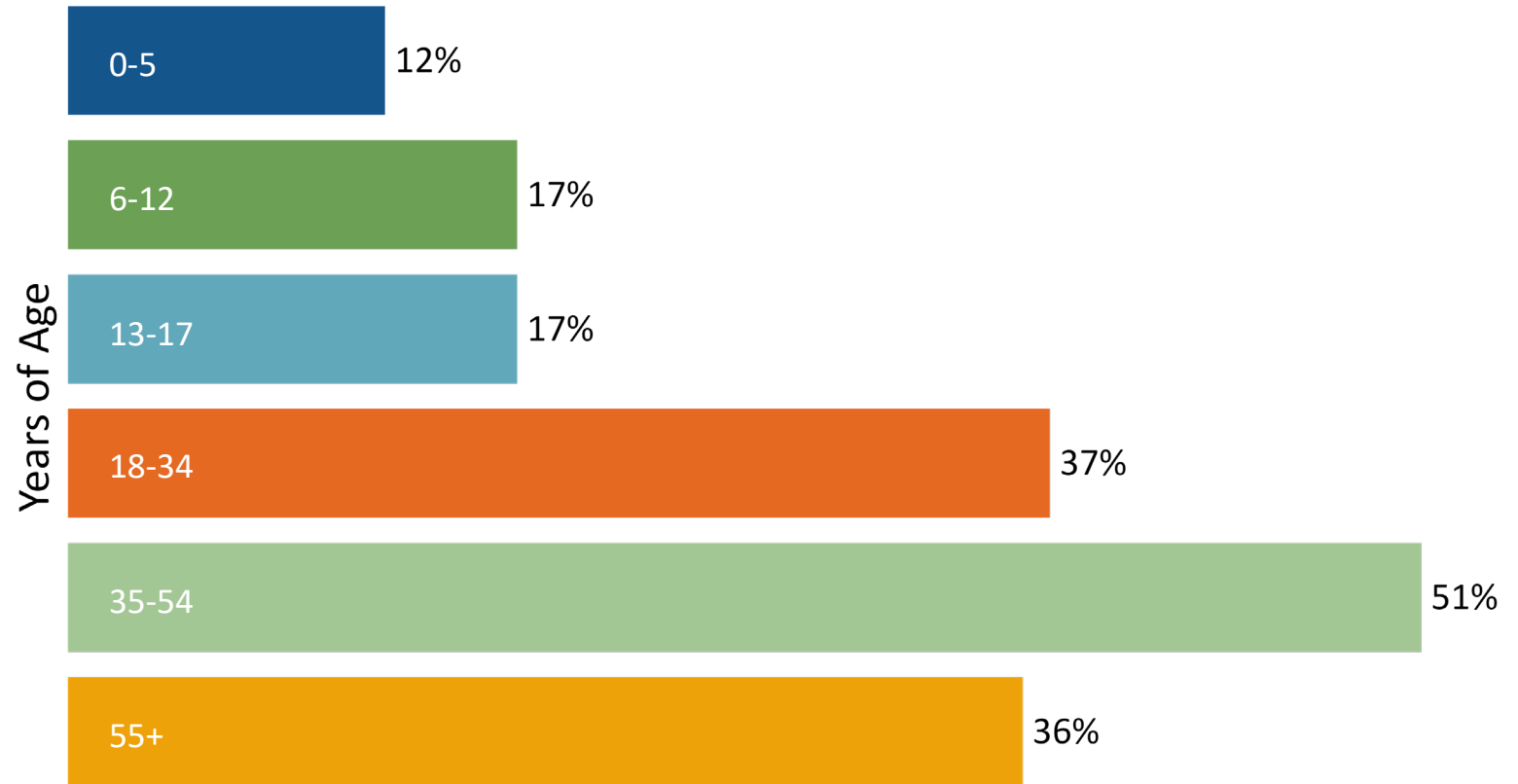
Travel Party Size & Age – Overnight Trips 2025

Average Travel
Party Size

2.7



Travel Party Age



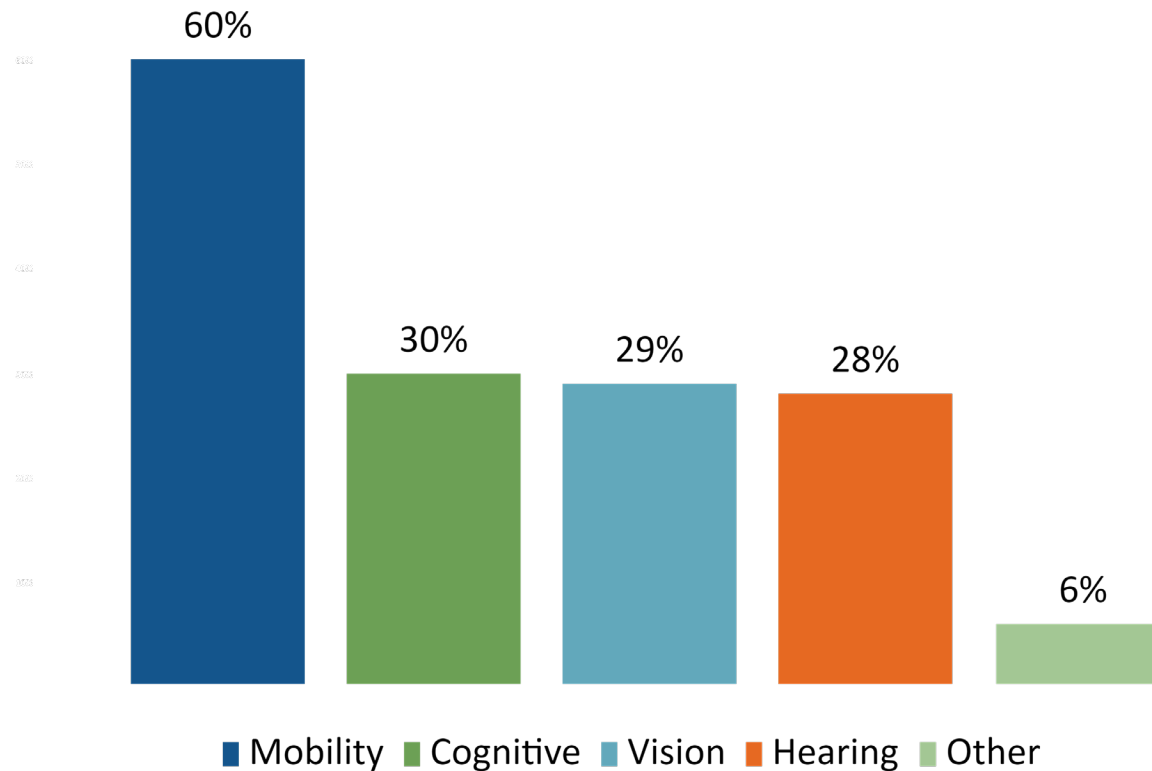
Travelers with Travel-Limiting Disabilities

Disability Categorizations – Overnight Trips 2025

Travel Parties with
an Individual Who
Required
Accessibility
Services

24%

▲ +6.3% vs U.S. Norm



Ease of
Accessibility

4.0
out of 5

Average Satisfaction Rating

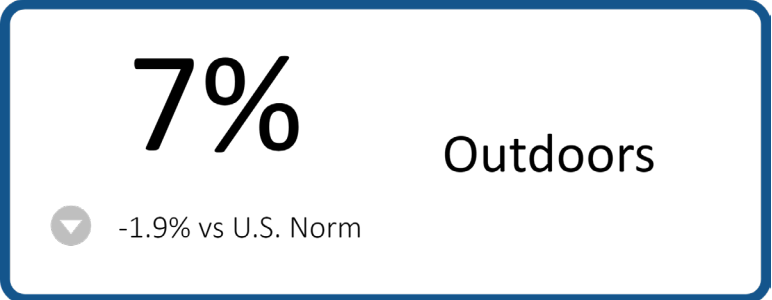
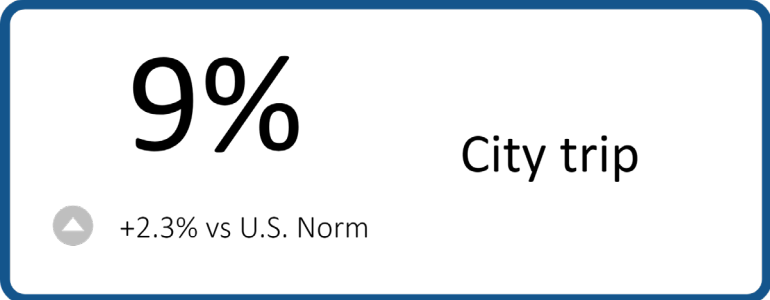
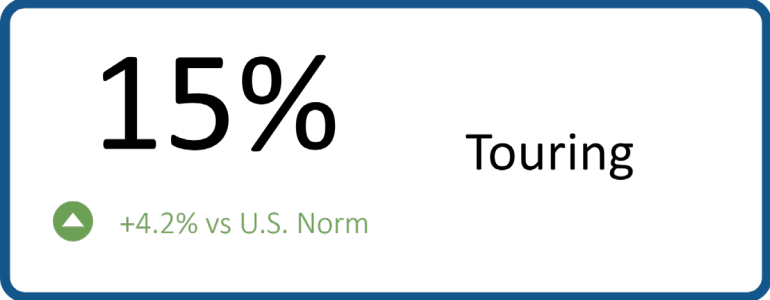
Pre-Trip

Traveler Motivators & Segmentation



Main Purpose of Trip

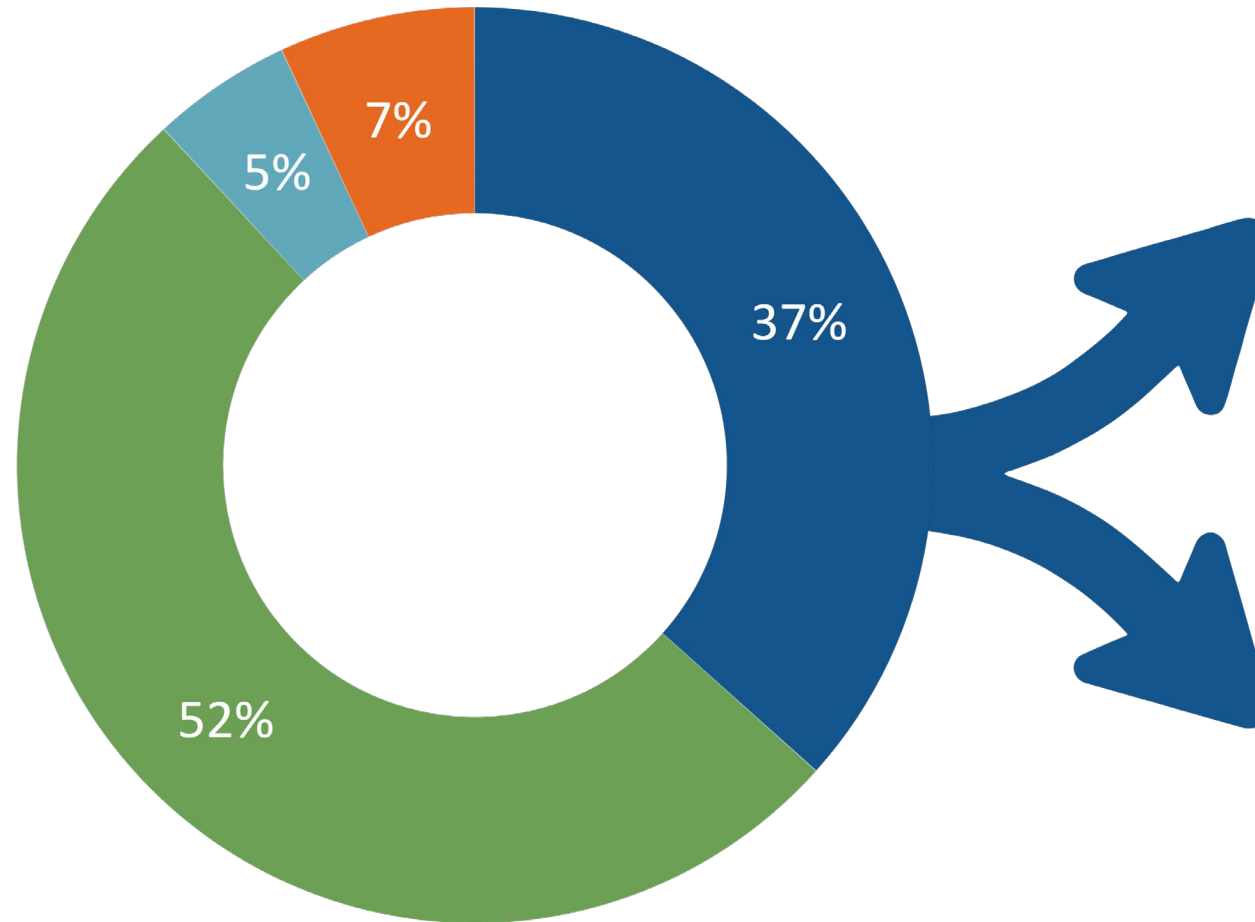
Each respondent selects **one** primary motivator for their trip



Market Segmentation

A Macro View of Travelers' Main Purpose of Trip – Overnight Trips 2025

- Visiting friends/relatives
- Marketable
- Business-leisure
- Business



88%

Visited Friends/Relatives Who Live in Scottsdale

12%

Met Friends/Relatives in Scottsdale Who Live Elsewhere

Top Traveler Personas

Each respondent selects **one** persona that most closely describes their travel style

19%

Budget friendly traveler: prioritizing affordability and value for money

13%

Culture/heritage/history seeker: seeking local cultures, historical sites, and engaging with local traditions

12%

Family traveler: prioritizing activities and accommodations suitable for children

12%

Luxury traveler: seeking high-end experiences and personalized services

10%

Outdoor & adventure seeker: drawn to outdoor activities and thrill-seeking

8%

Business traveler: traveling for work purposes, prioritizing convenience connectivity

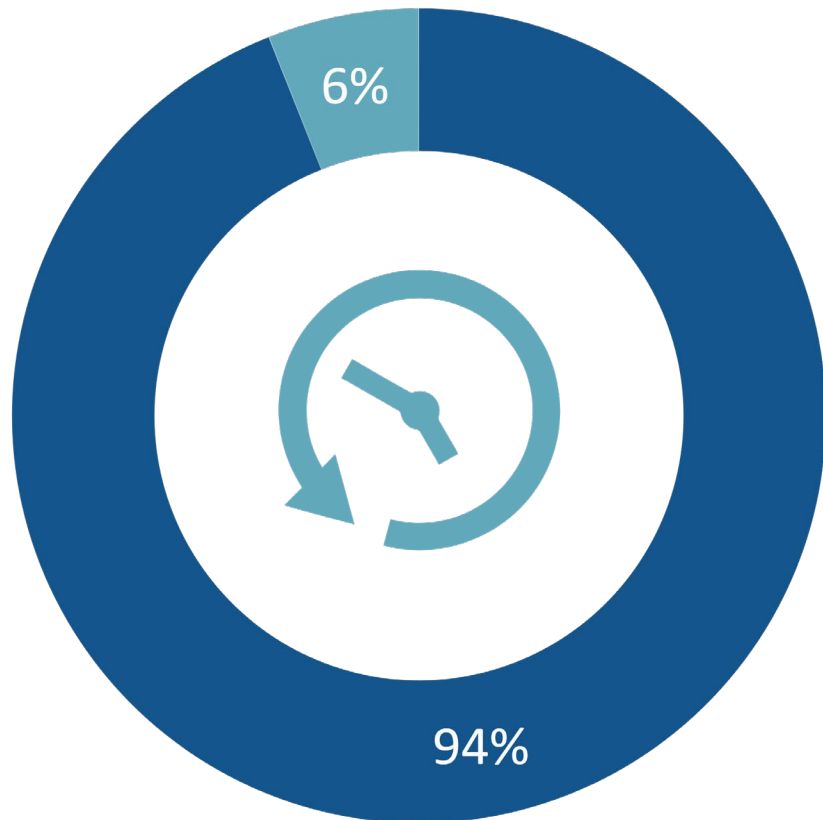
Pre-Trip

Travel Planning

Duration of Travel Planning

When Travelers Began Research for Their Trip – Overnight Trips 2025

■ Planned in advance ■ Did not plan in advance



Did not plan anything in advance

6%



-4.8% vs U.S. Norm

2 months or less

47%



-1.1% vs U.S. Norm

3-5 months

24%



+2.9% vs U.S. Norm

6 months or more

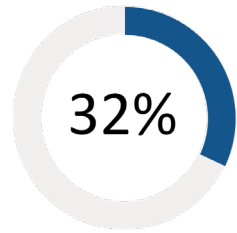
24%



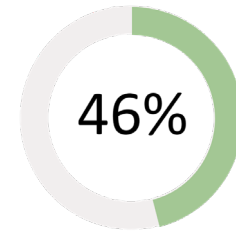
+3.0% vs U.S. Norm

Sources of Trip Planning

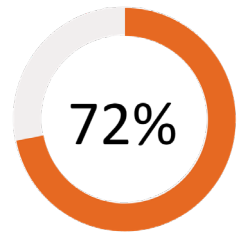
Share of Travelers Who Used Each Media Type for Trip Planning – Overnight Trips 2025



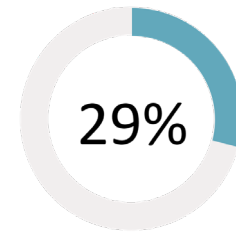
Print



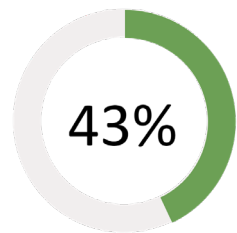
In-Person



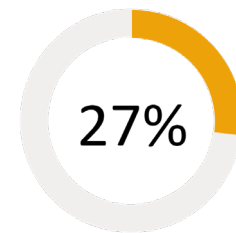
Online/Digital



TV/Video



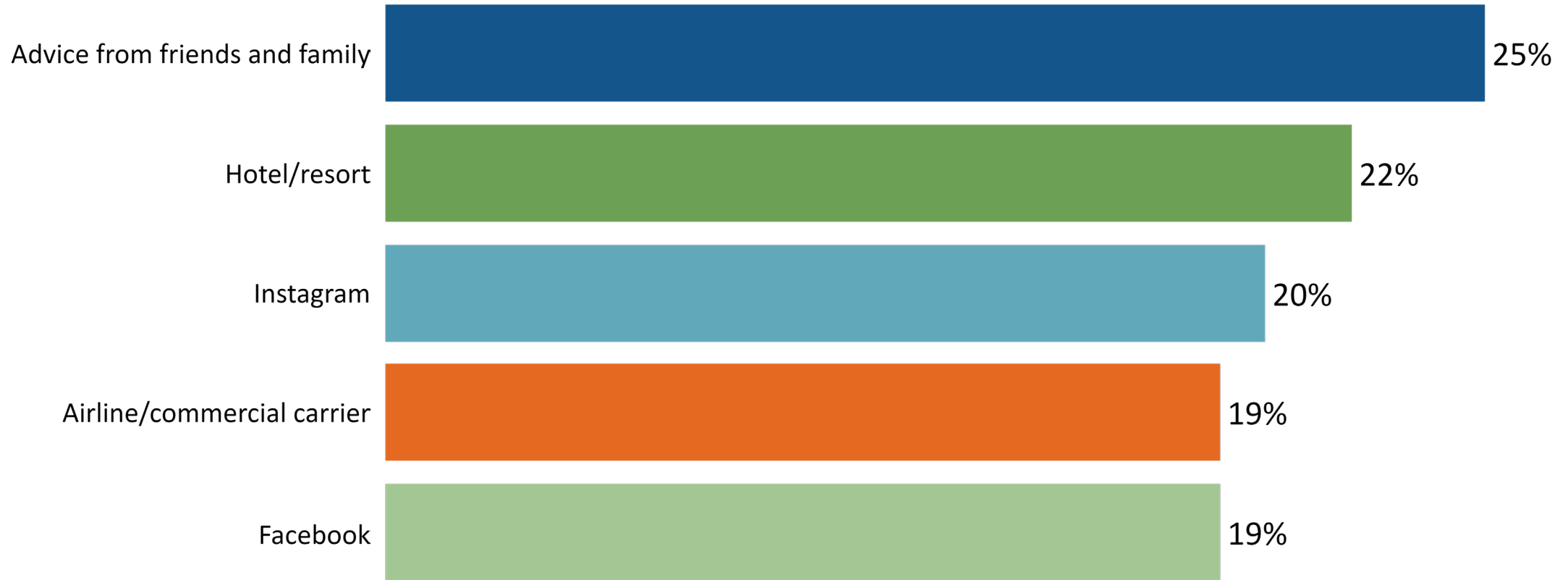
Social Media



Radio/Audio

Sources of Trip Planning

Top Information Sources Travelers Used for Trip Planning – Overnight Trips 2025



During Trip

Trip Structure

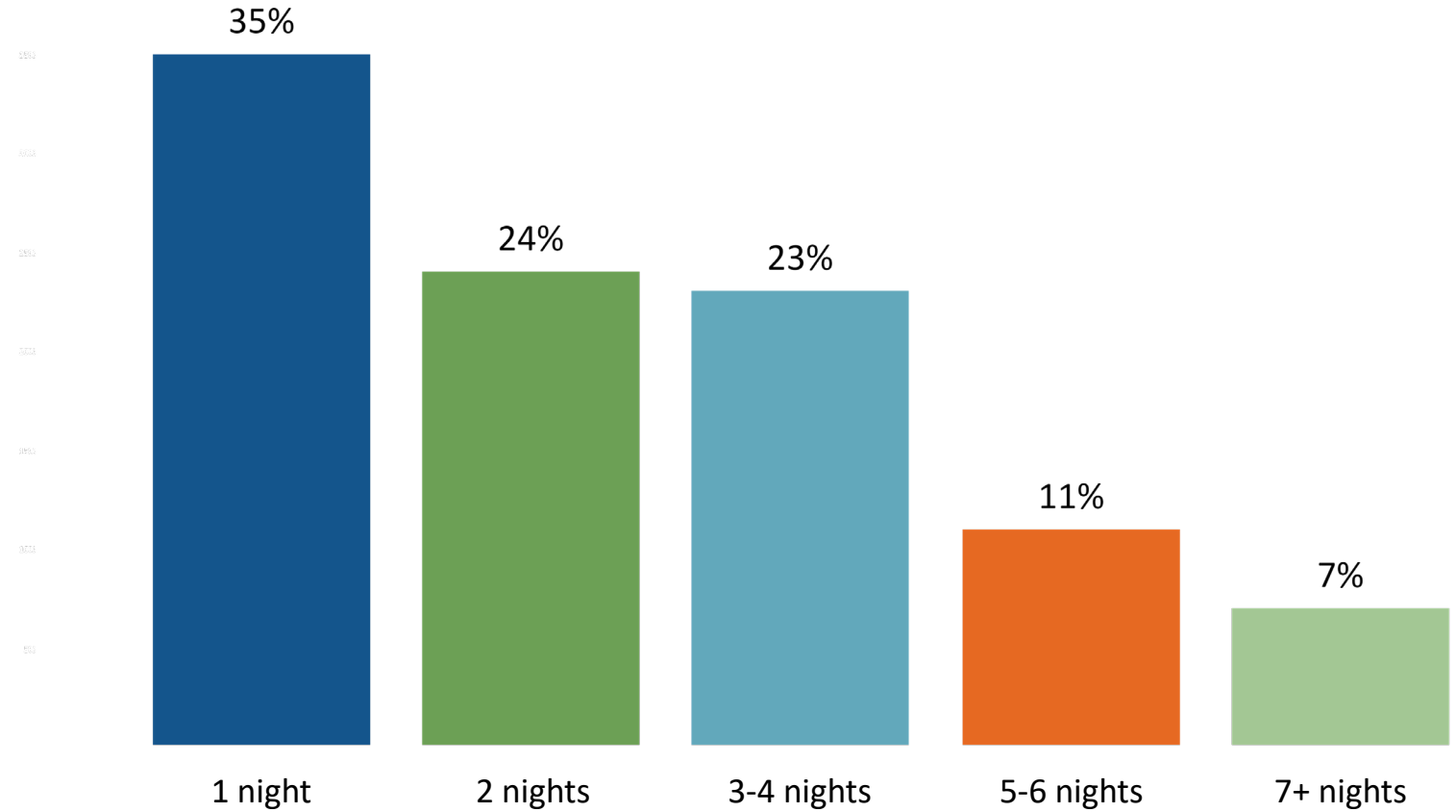


Trip Structure

Nights Spent in Scottsdale – Overnight Trips 2025

Average
Number of Nights

3.0



Trip Structure

Share of Total Trip Spent in Scottsdale – Overnight Trips 2025

Average Number of
Nights Spent in Scottsdale

3.0

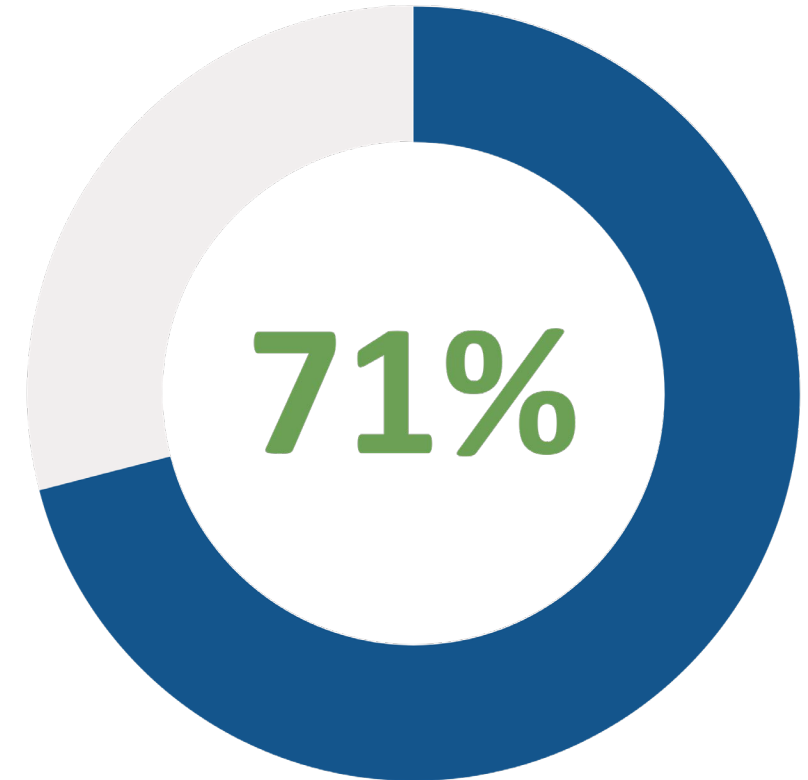
Average Number of
Total Trip Nights

4.2

*Accounts for trip nights that
Scottsdale travelers spent in other
destinations.*

=

Share of Total Trip Spent in
Scottsdale

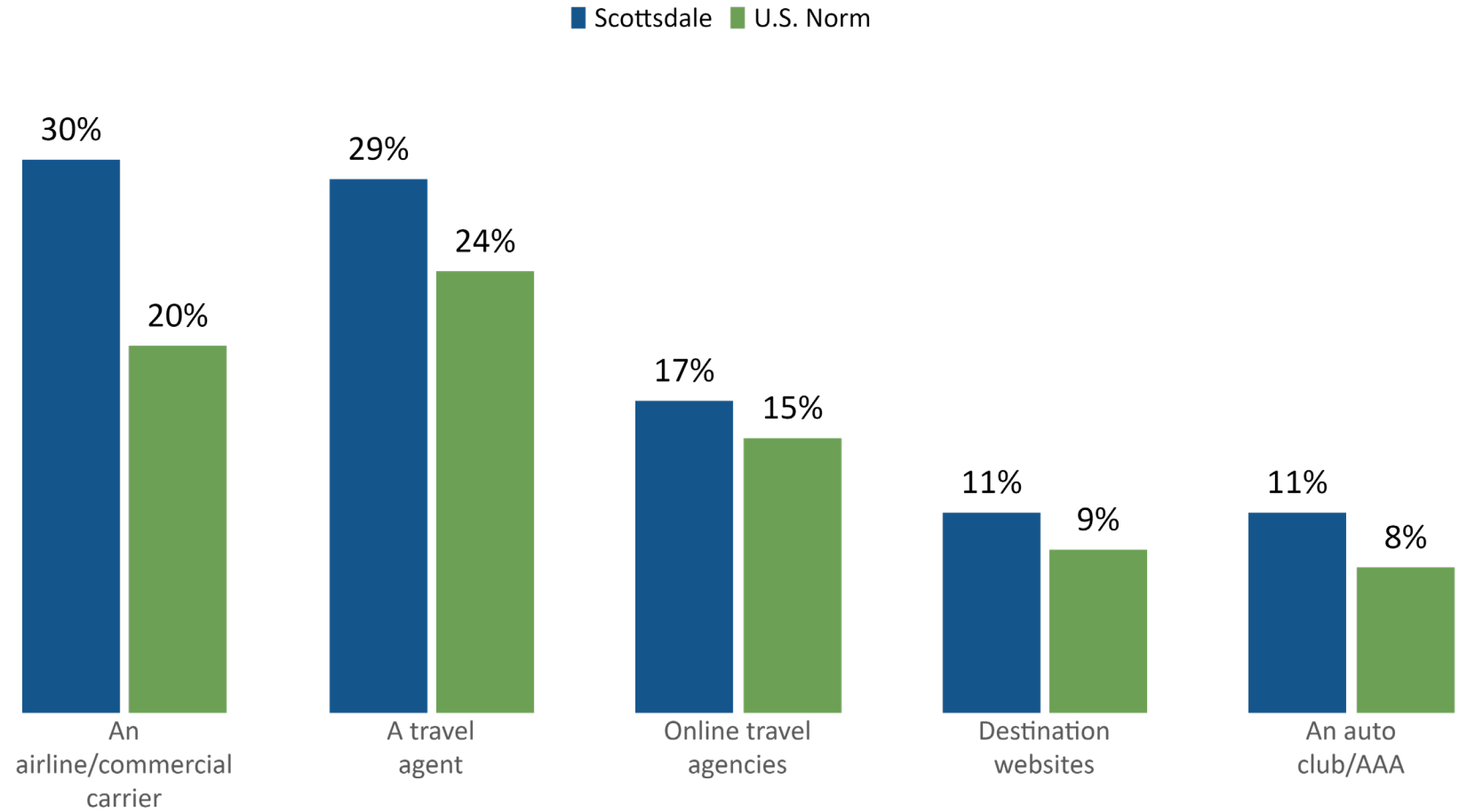


During Trip

Transportation & Accommodations

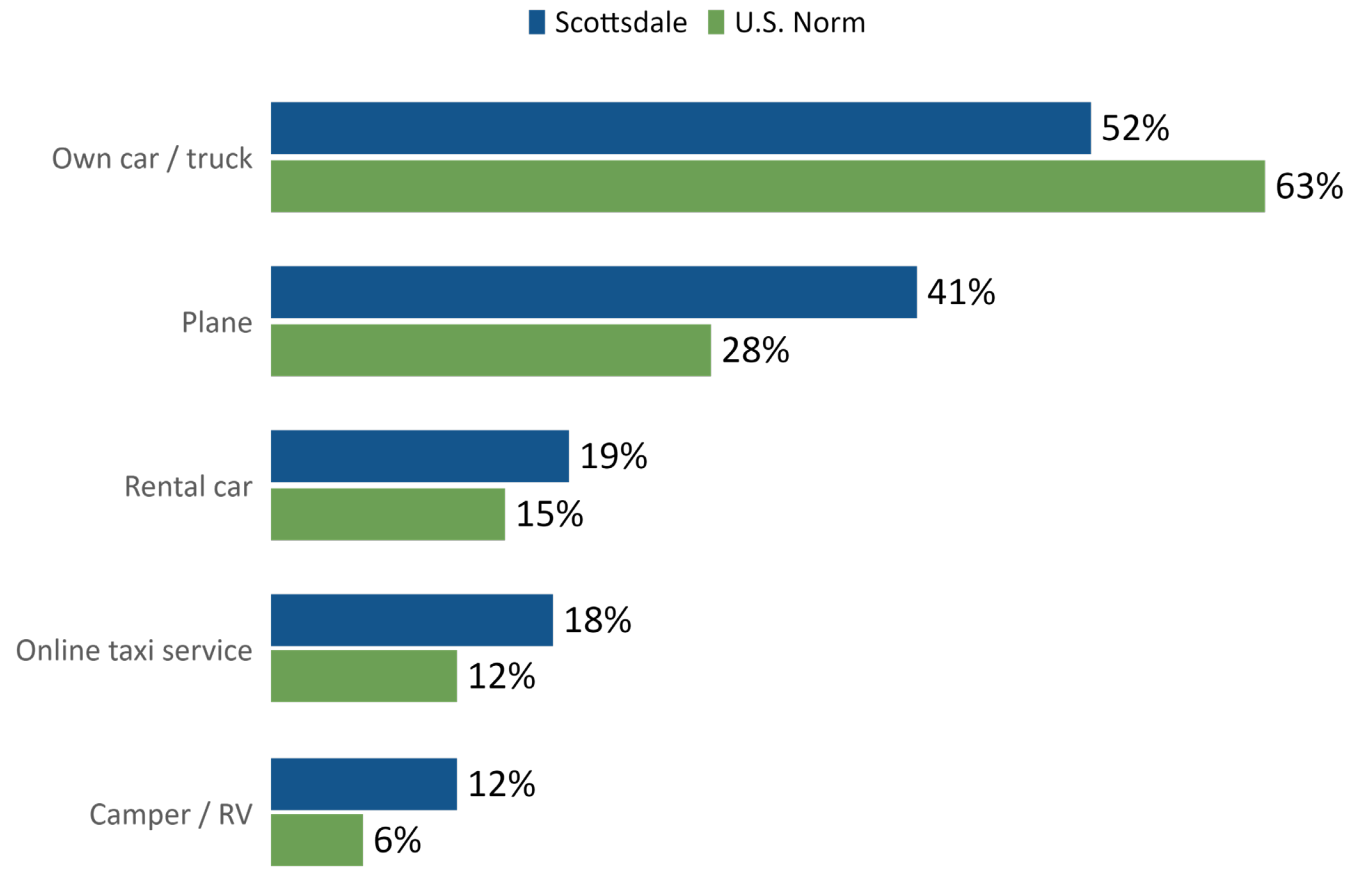
Booking: Transportation

Top Booking Sources for Transportation – Overnight Trips 2025



Transportation to Destination

Top Modes of Transportation Used by Travelers to Get to Scottsdale – Overnight Trips 2025



Vehicle Type

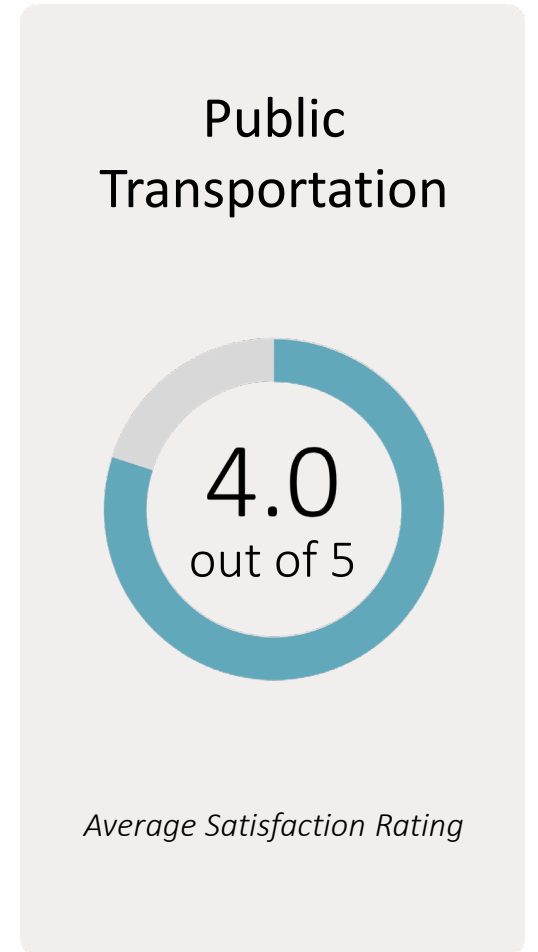
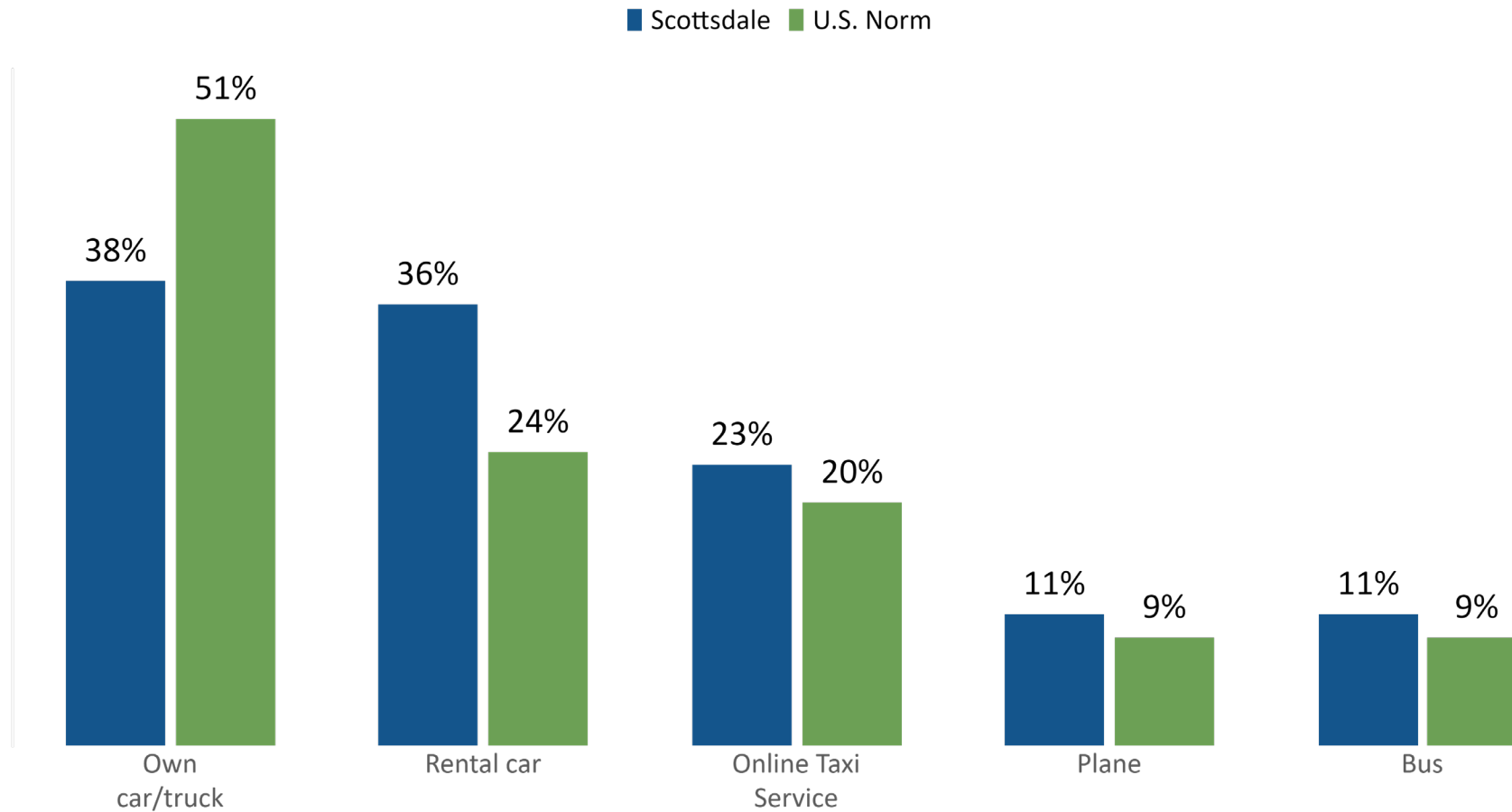
Gasoline/diesel	64%	▼	-14.4% vs U.S. Norm
Hybrid	23%	▲	+10.6% vs U.S. Norm
Electric	19%	▲	+8.4% vs U.S. Norm
Plug-in-hybrid	14%	▲	+8.3% vs U.S. Norm

Vehicle type is only asked of travelers who selected 'rental car' or their 'own car/truck' as a mode of transportation to the destination.

See Reference Guide for a full list of transportation modes.

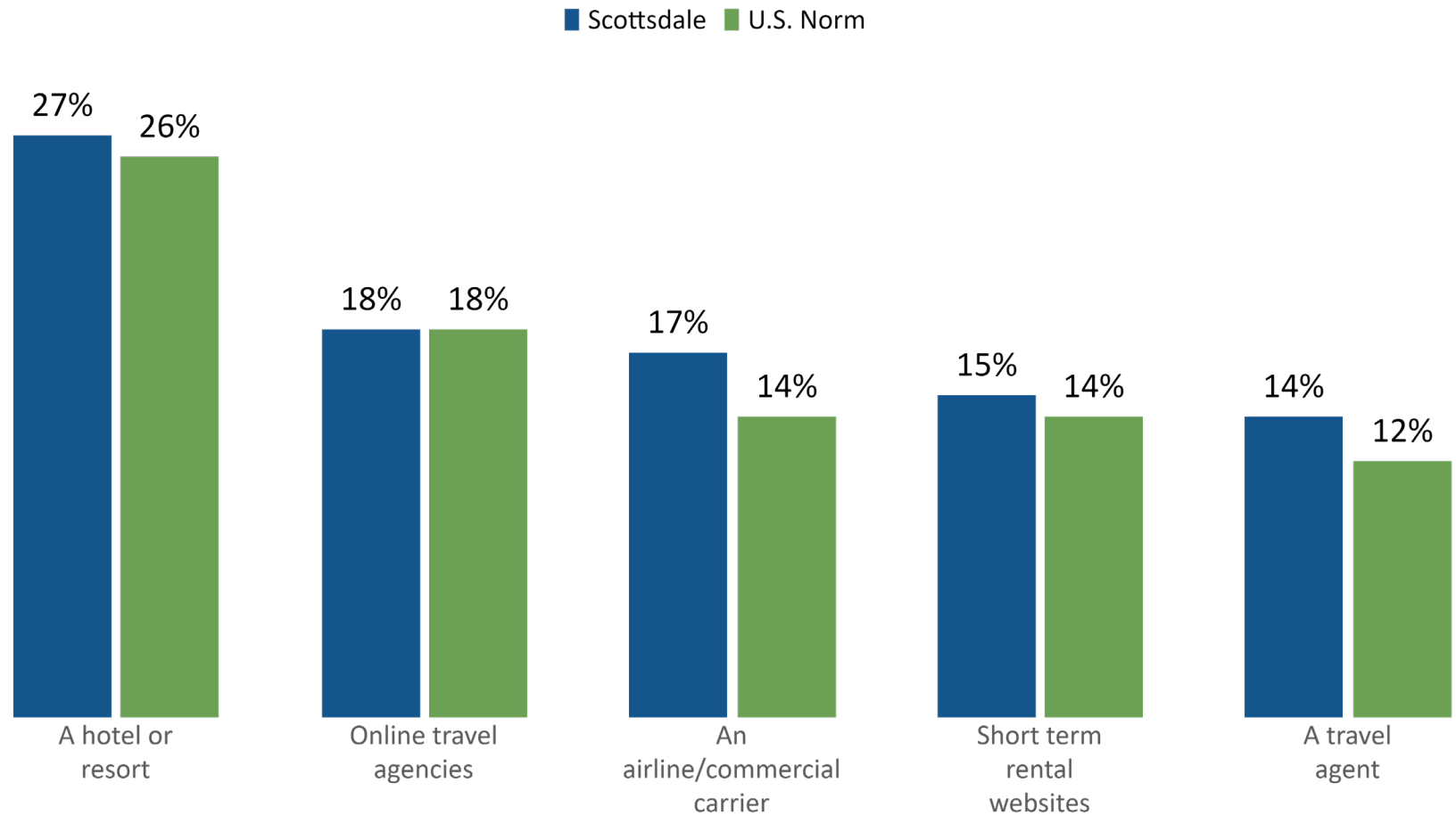
Transportation *Within* Destination

Top Modes of Transportation Used by Travelers in Scottsdale – Overnight Trips 2025



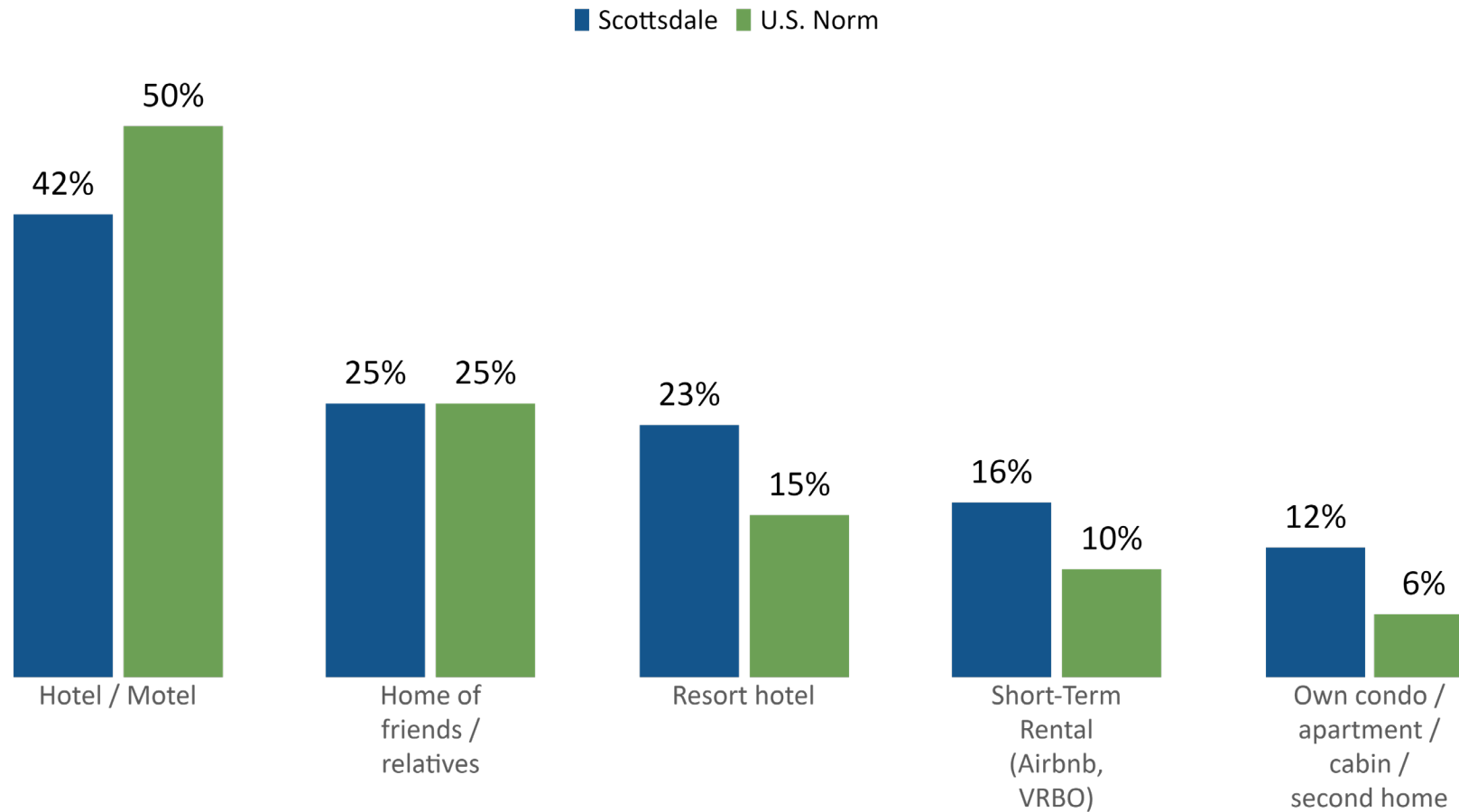
Booking: Accommodations

Top Booking Sources for Accommodations – Overnight Trips 2025

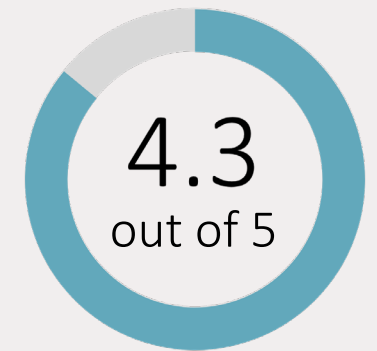


Accommodations

Top Accommodation Types for Scottsdale Travelers – Overnight Trips 2025



Quality of Accommodations



Average Satisfaction Rating

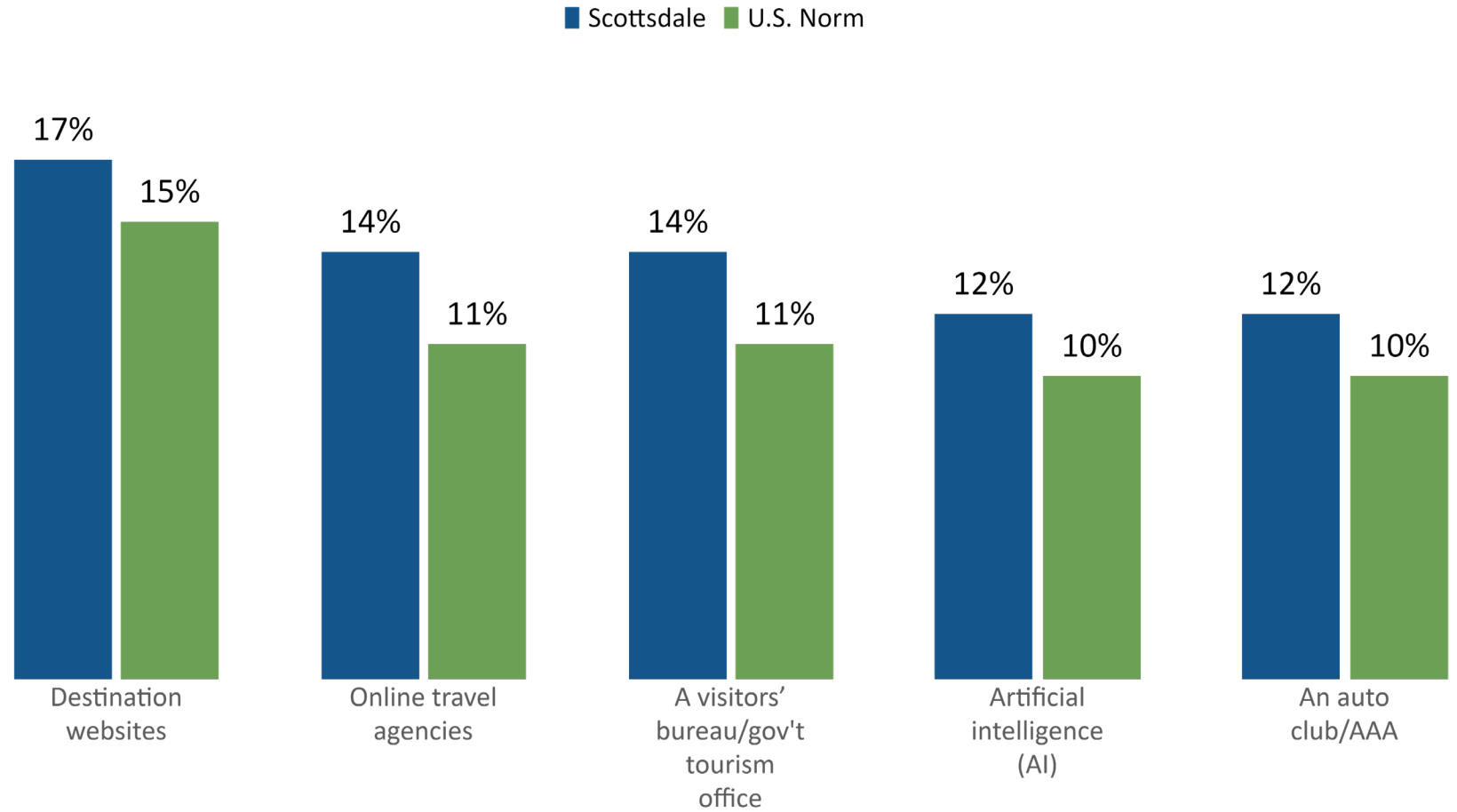
During Trip

Destination Activities



Booking: Activities

Top Booking Sources for Activities – Overnight Trips 2025



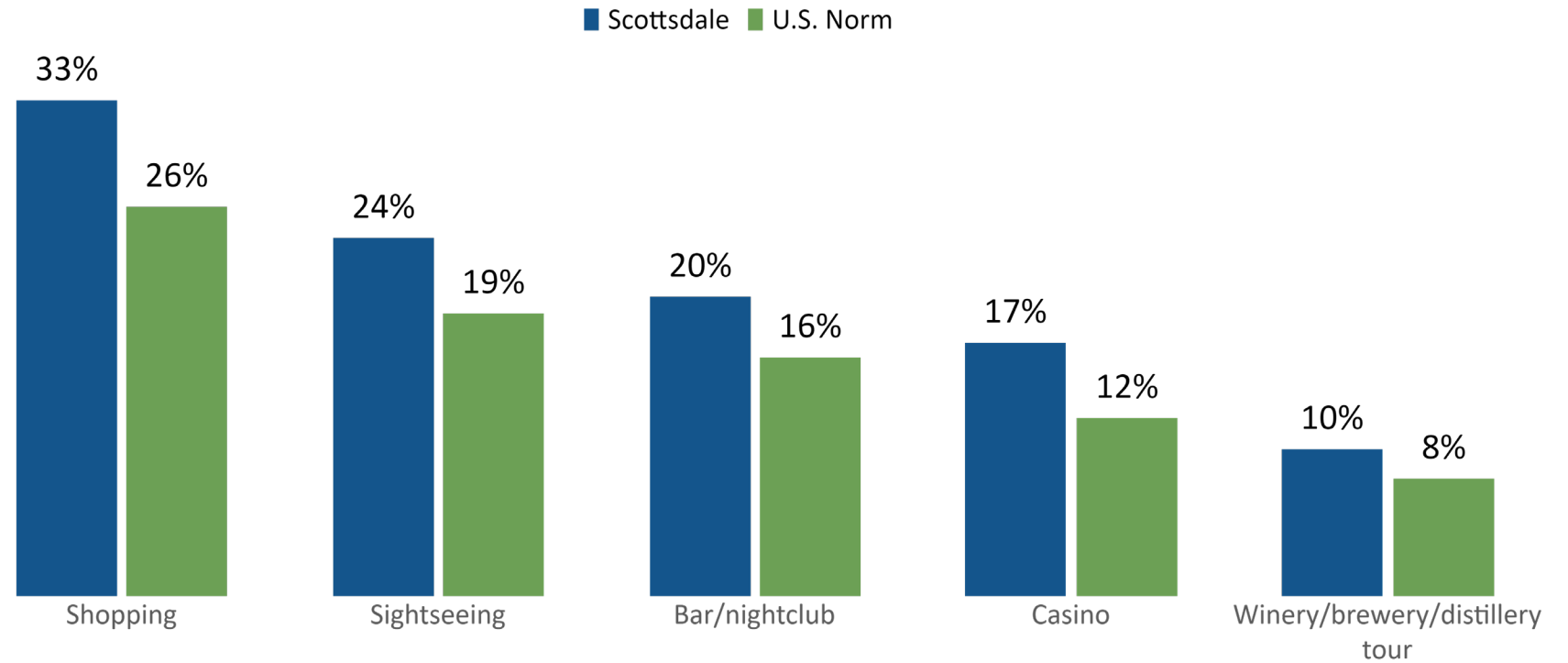
Entertainment Activities

Top Entertainment Activities for Scottsdale Travelers – Overnight Trips 2025

67%

Participated in
Entertainment
Activities
During Their Trip

U.S. Norm: 62%



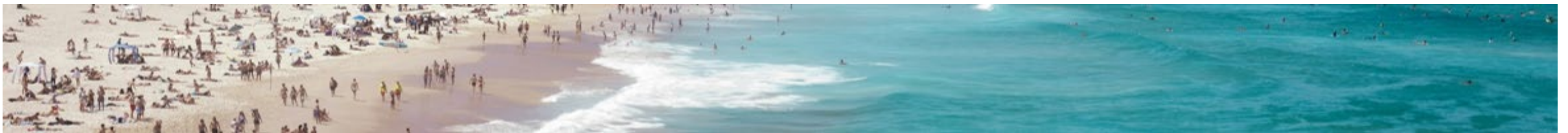
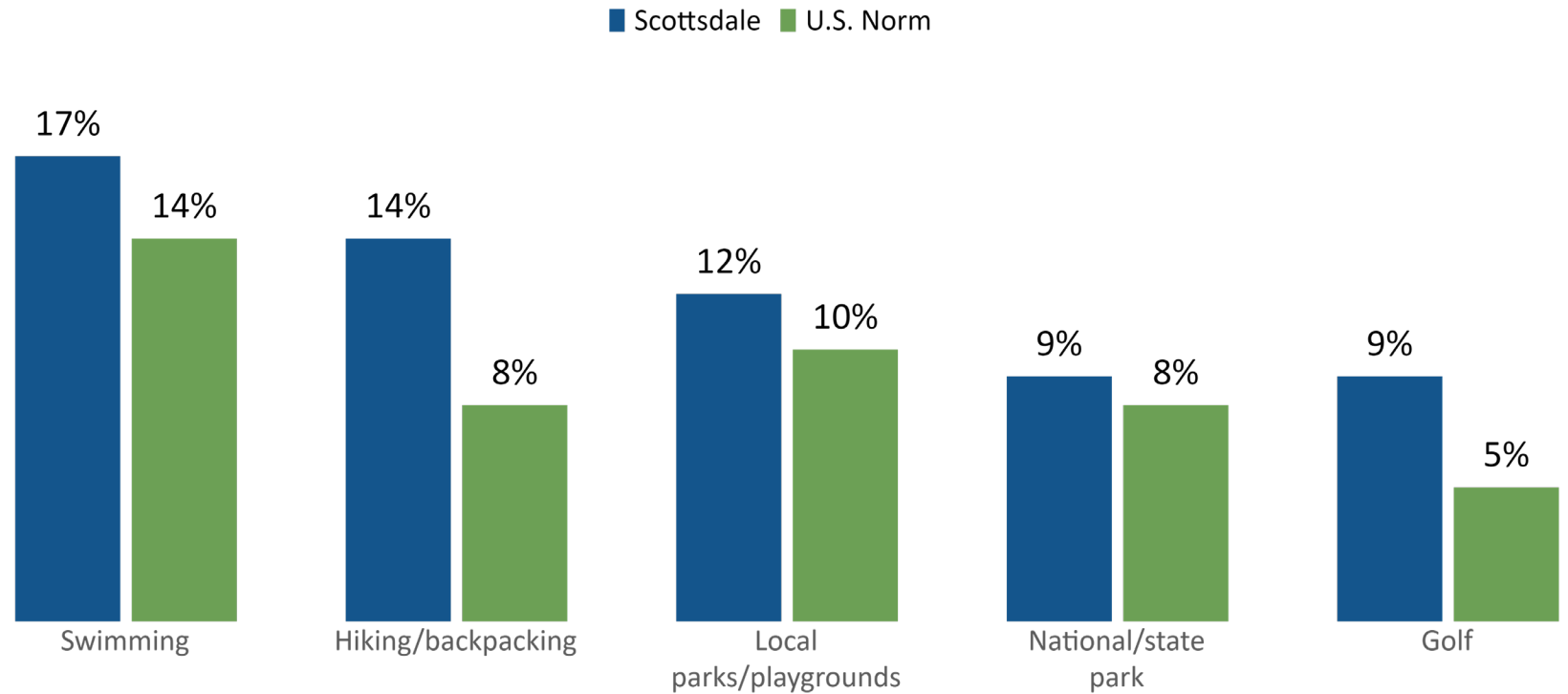
Recreational Activities

Top Recreational Activities for Scottsdale Travelers – Overnight Trips 2025

60%

Participated in
Recreational
Activities
During Their Trip

U.S. Norm: 52%



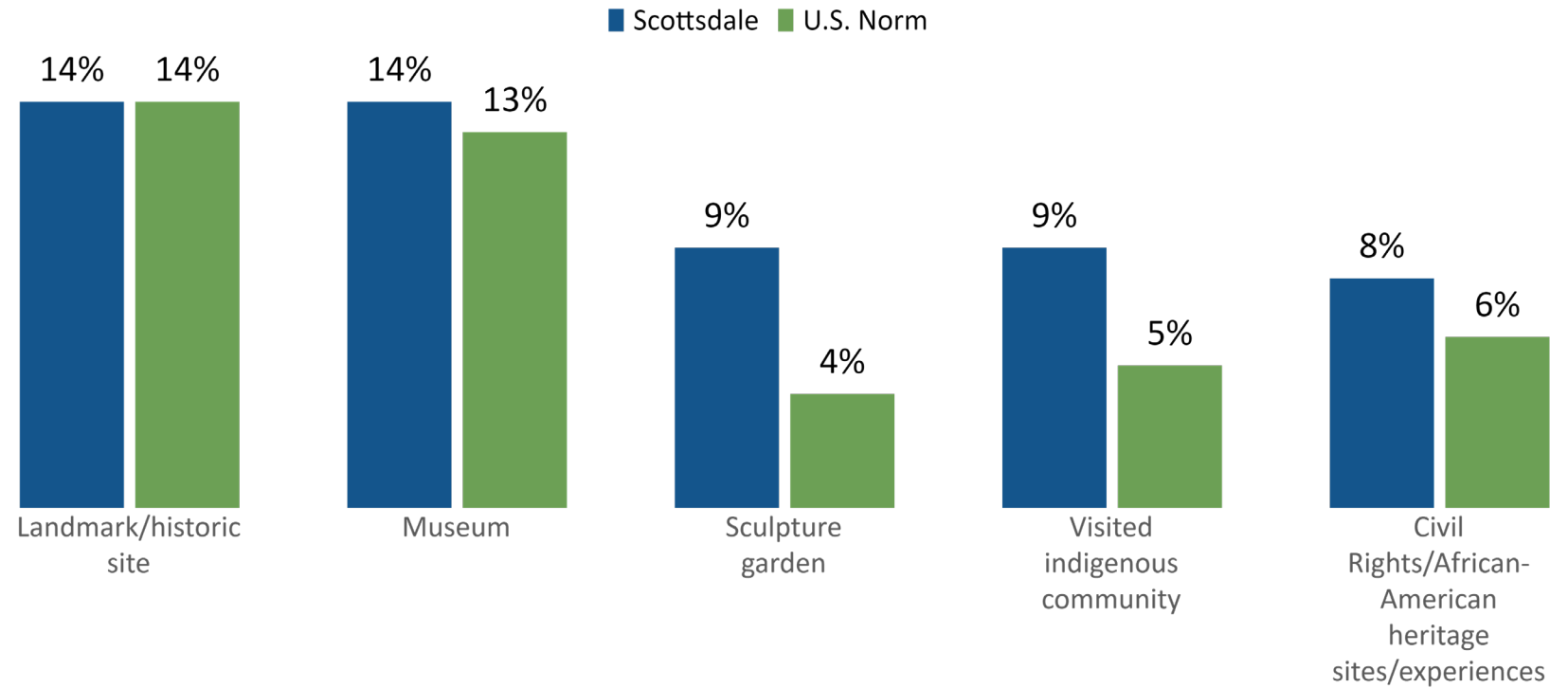
Cultural Activities

Top Cultural Activities for Scottsdale Travelers – Overnight Trips 2025

40%

Participated in Cultural Activities During Their Trip

U.S. Norm: 33%



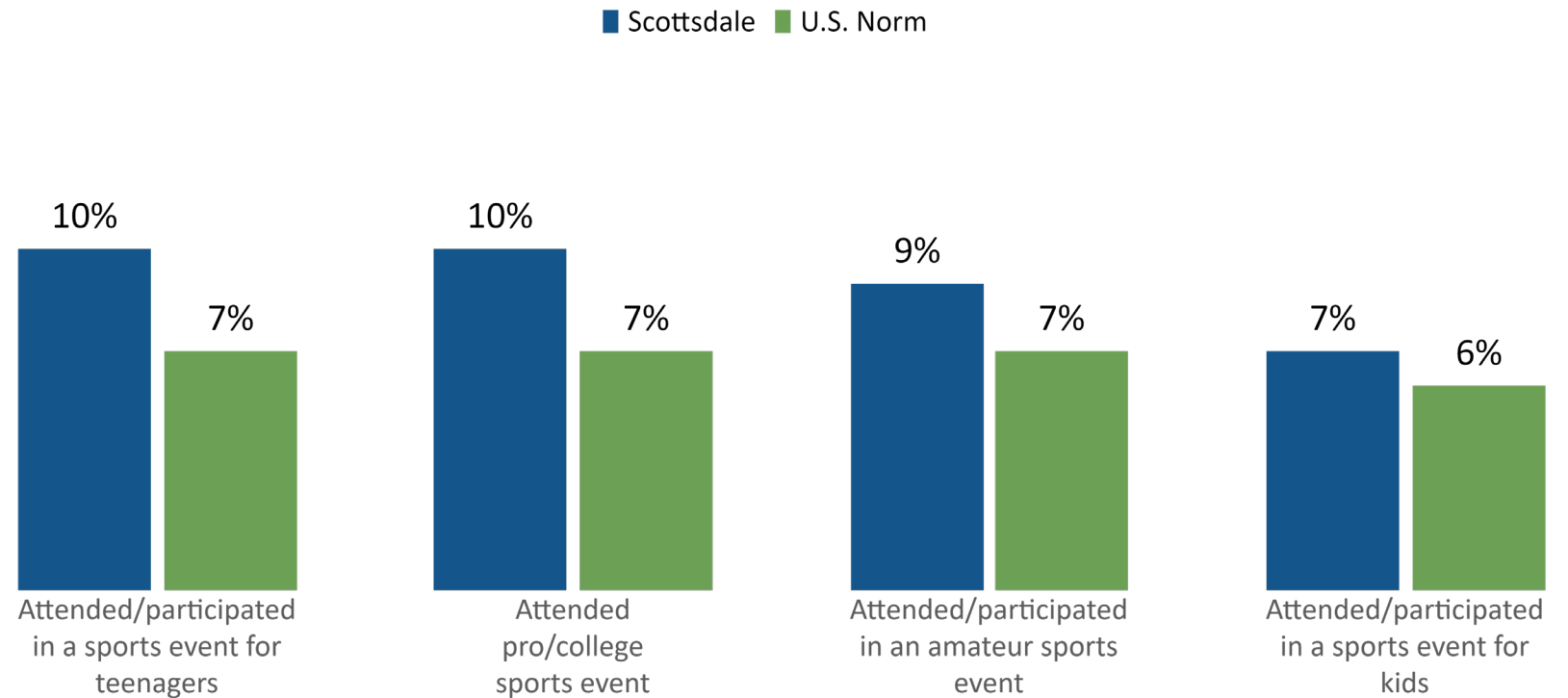
Sporting Events

Top Sporting Events for Scottsdale Travelers – Overnight Trips 2025

28%

Participated in
Sporting
Events
During Their Trip

U.S. Norm: 21%



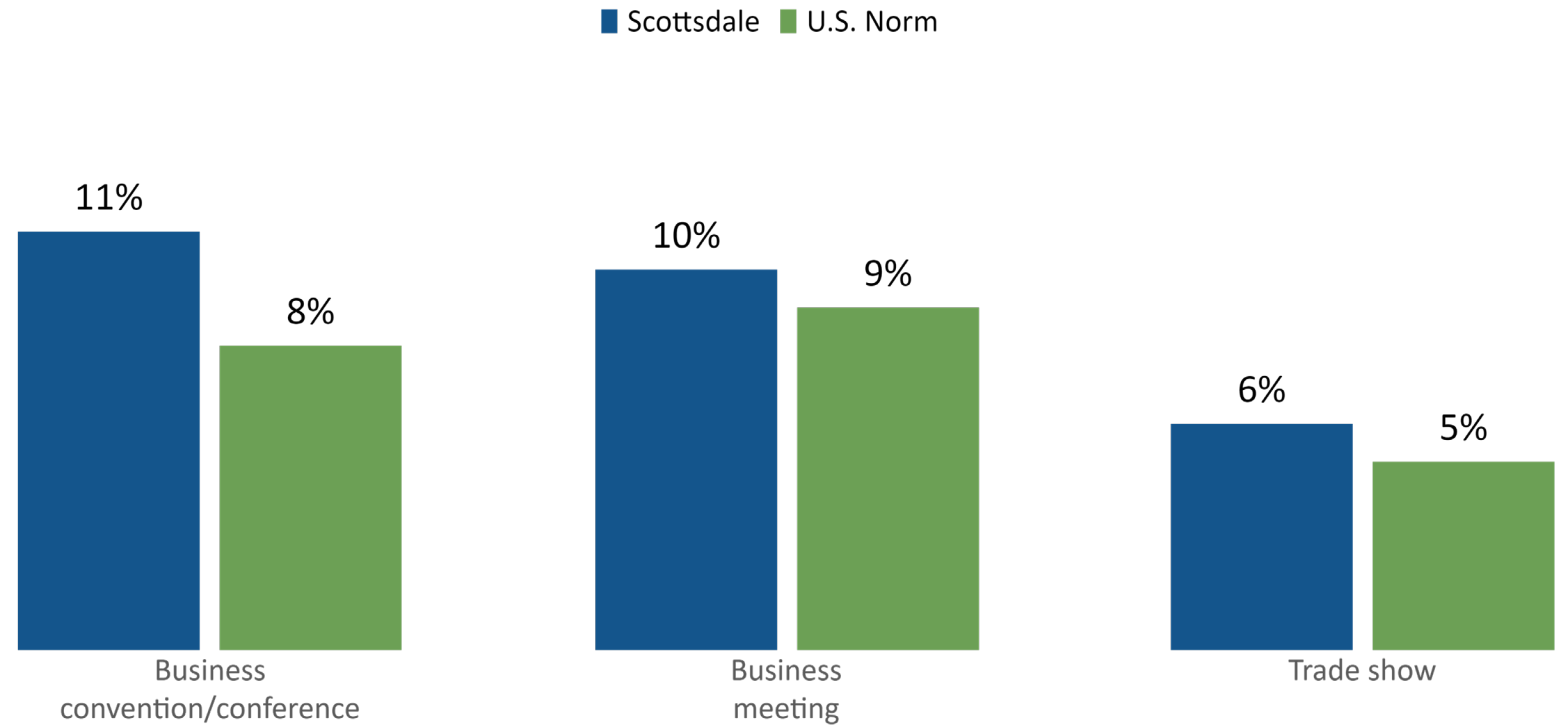
Business Activities

Top Business Activities for Scottsdale Travelers – Overnight Trips 2025

23%

Participated in
Business
Activities
During Their Trip

U.S. Norm: 17%



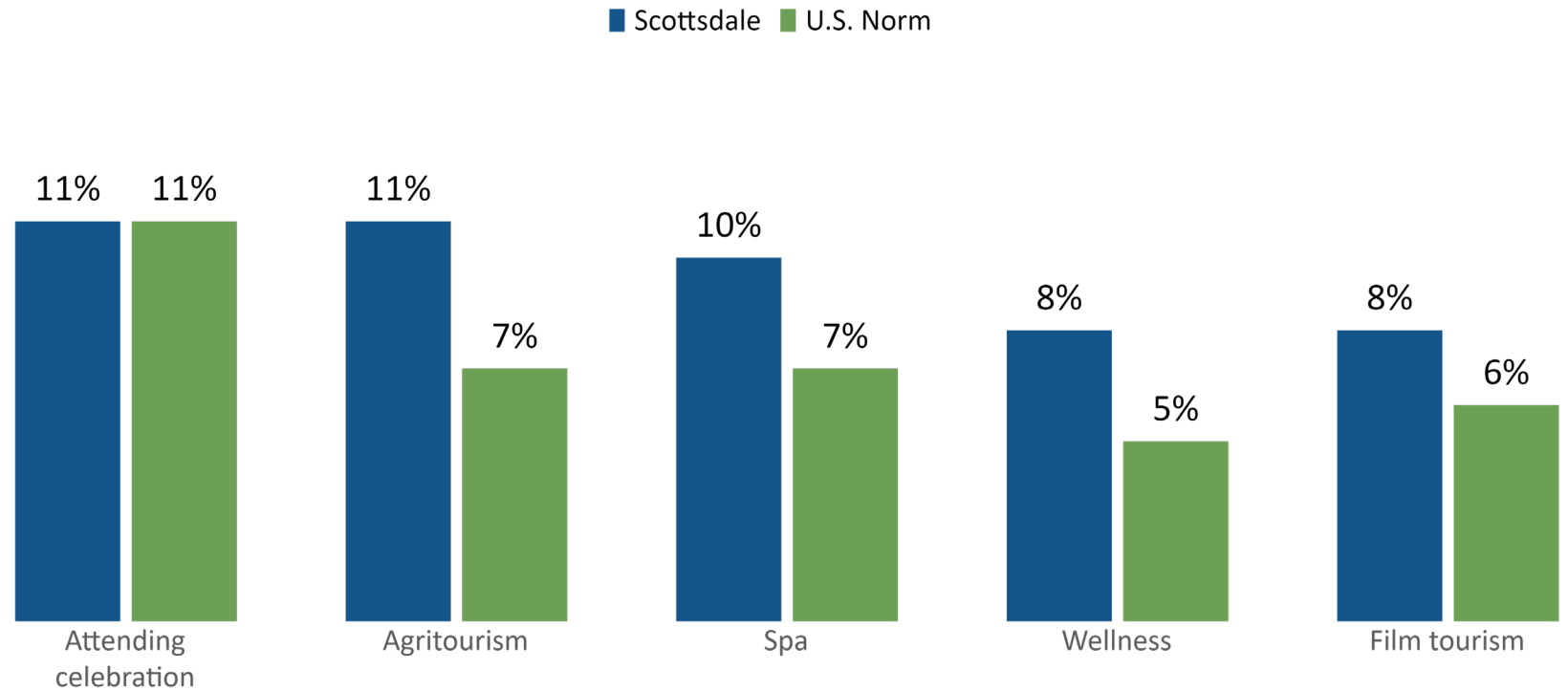
Other Activities

Top Other Activities for Scottsdale Travelers – Overnight Trips 2025

47%

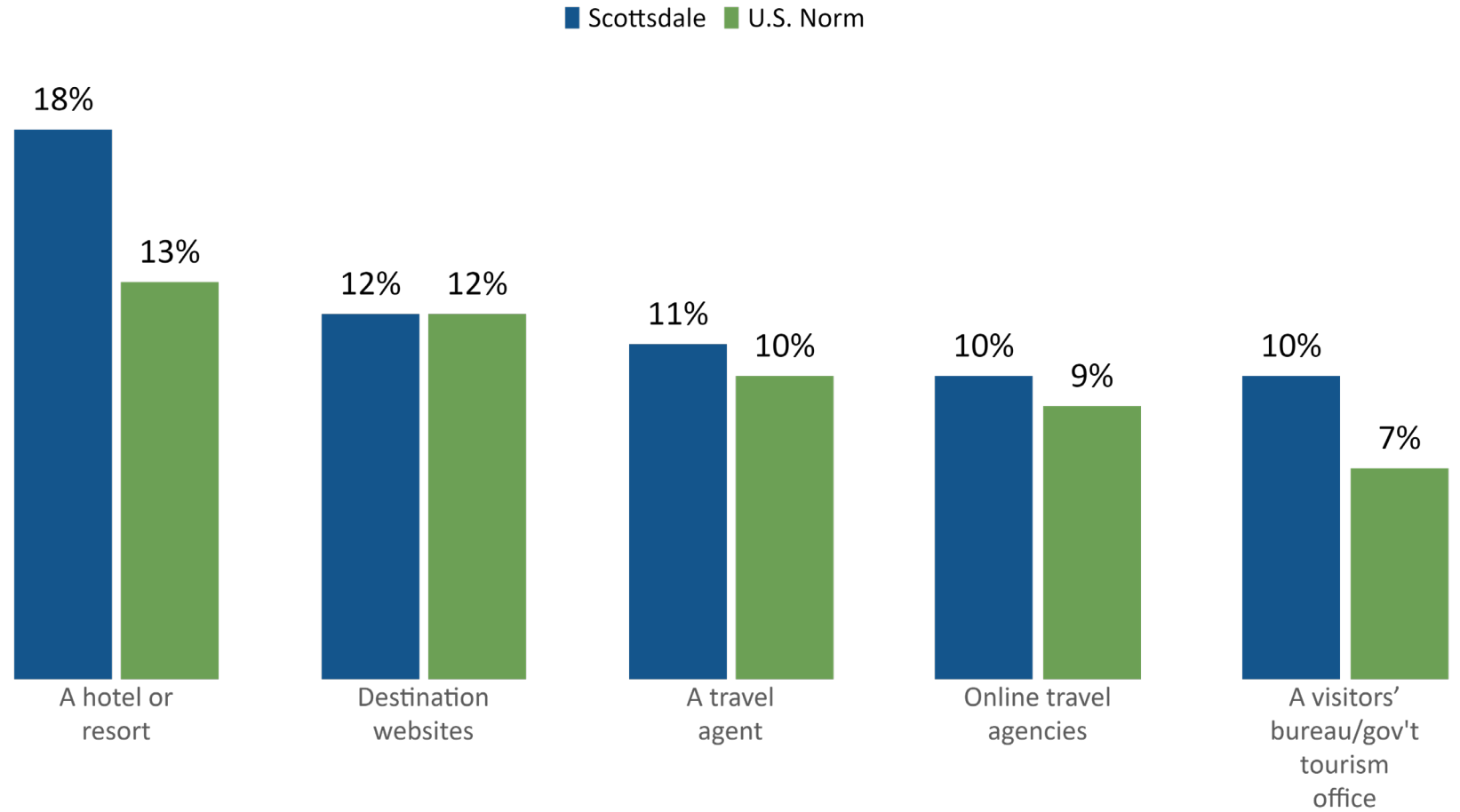
Participated in
Other
Activities
During Their Trip

U.S. Norm: 41%



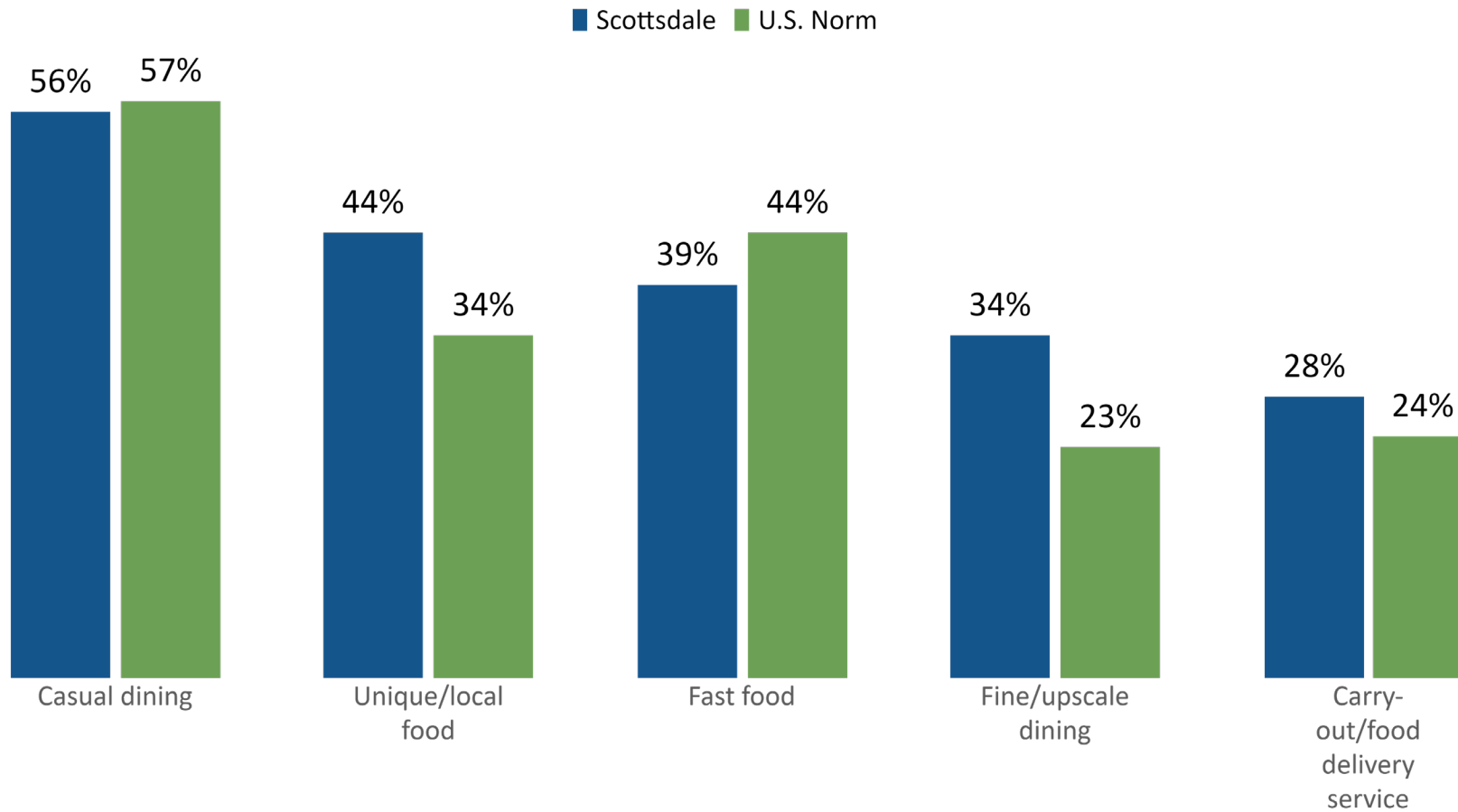
Booking: Dining

Top Booking Sources for Dining – Overnight Trips 2025

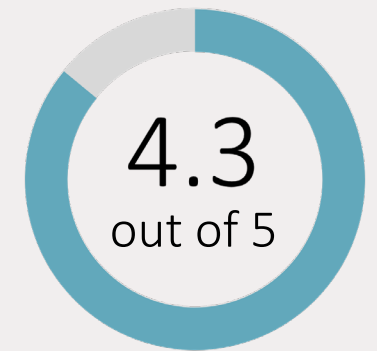


Dining

Top Dining Categories for Scottsdale Travelers – Overnight Trips 2025



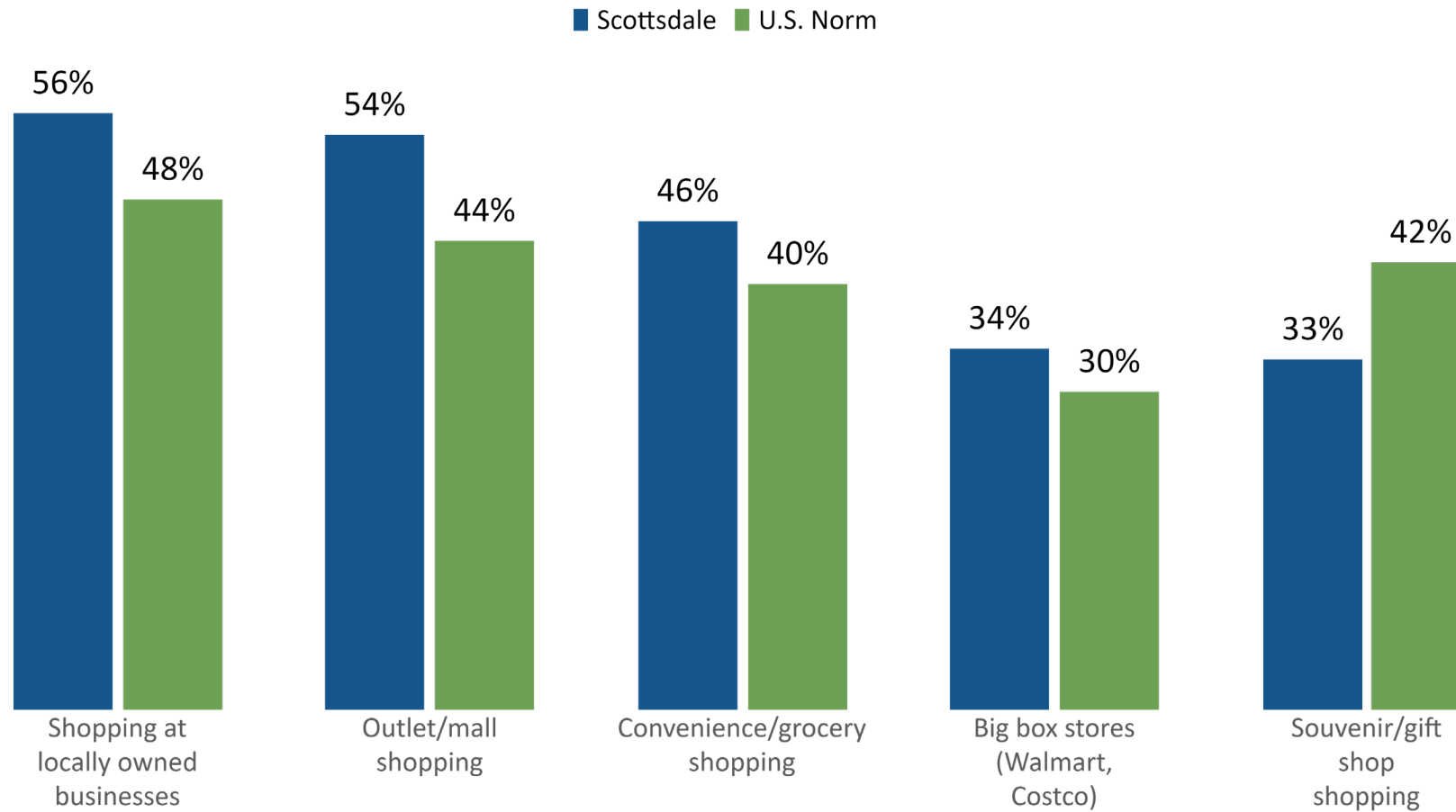
Quality of Food



Average Satisfaction Rating

Shopping

Top Shopping Categories for Scottsdale Travelers – Overnight Trips 2025



This question is only asked of travelers who selected 'shopping' as an activity during their trip to Scottsdale.

Post-Trip

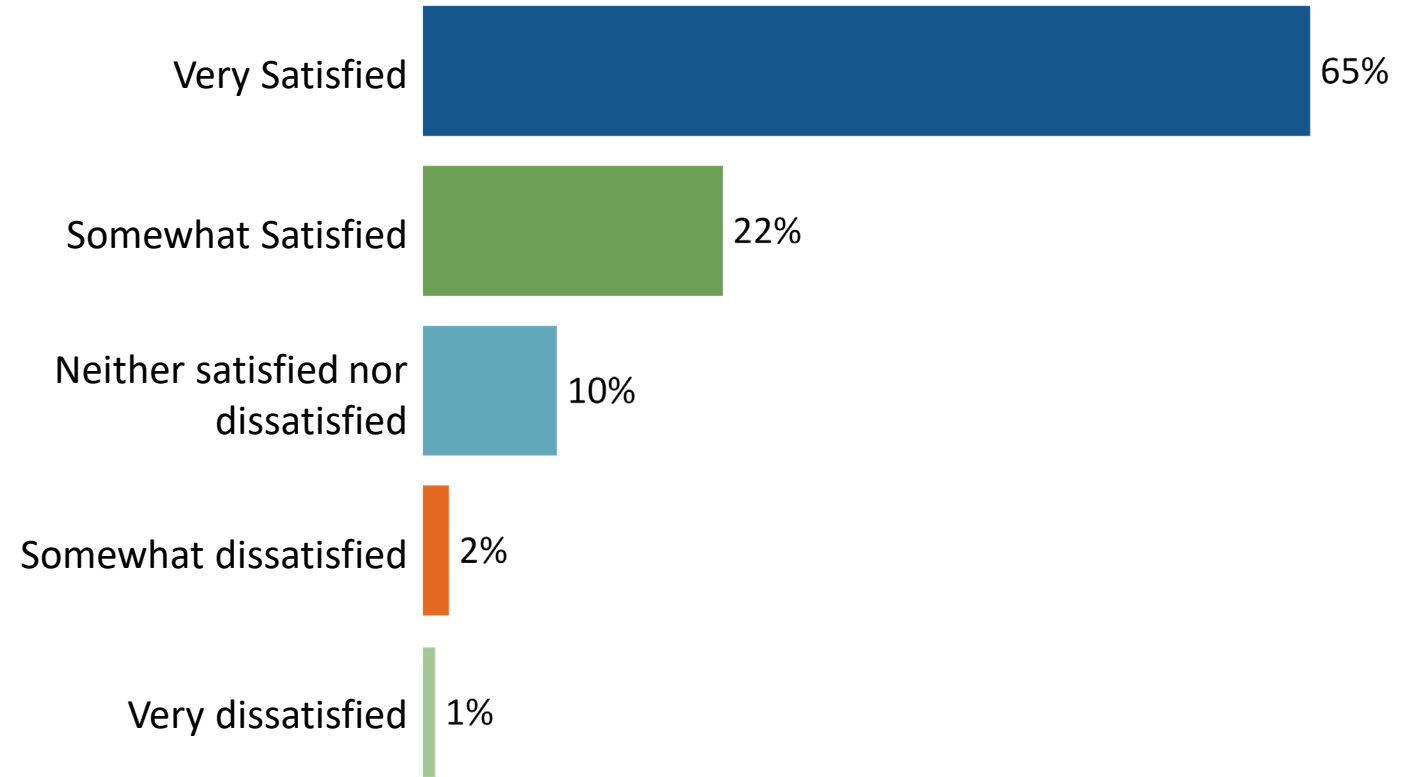
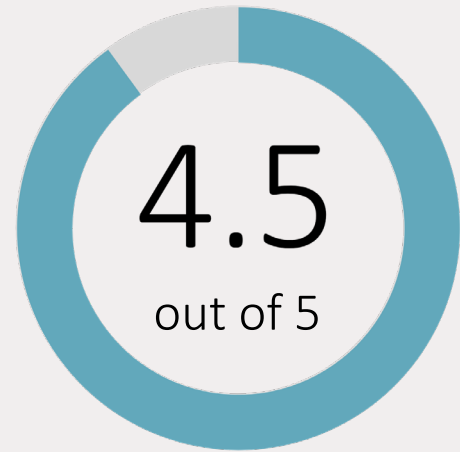
Traveler Satisfaction & Retention



Satisfaction with Overall Trip

How Overnight Visitors Rated Their Scottsdale Experience – Overnight Trips 2025

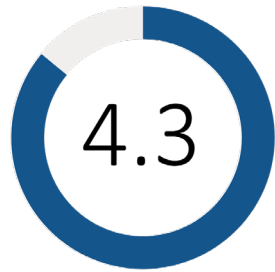
Average Satisfaction Rating



Additional Satisfaction Indicators

Key Components of the Scottsdale Experience – Overnight Trips 2025

Safety & Security



Cleanliness of Destination



Value for Money



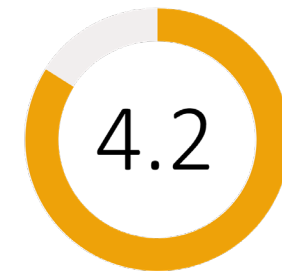
Sightseeing & Attractions



Music, Nightlife, & Entertainment



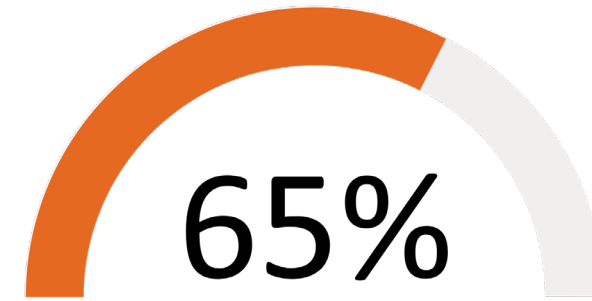
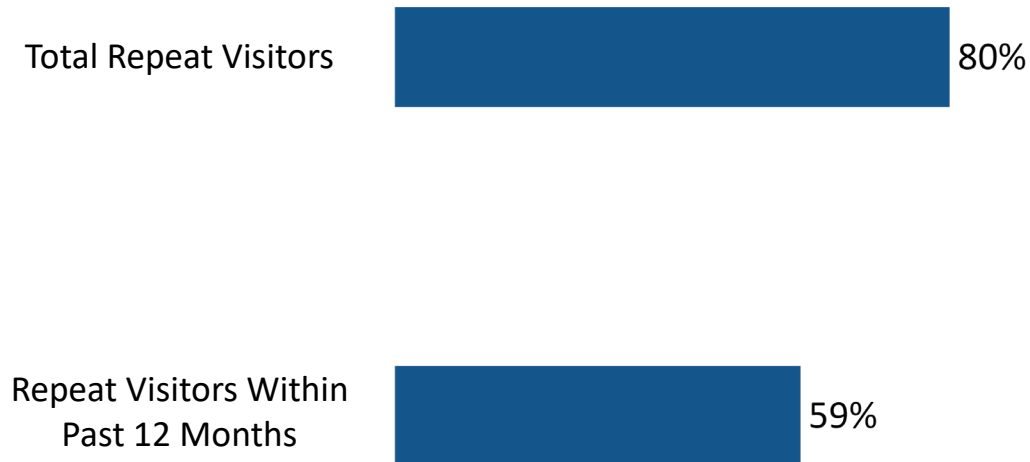
Friendliness of People



Visitor Retention Metrics

Key Predictors of Future Travel to Scottsdale – Overnight Trips 2025

Past Visitation



Selected That They Were
'Very Likely' to Return to
Scottsdale

*Repeat visitation is the strongest
predictor of future travel.*

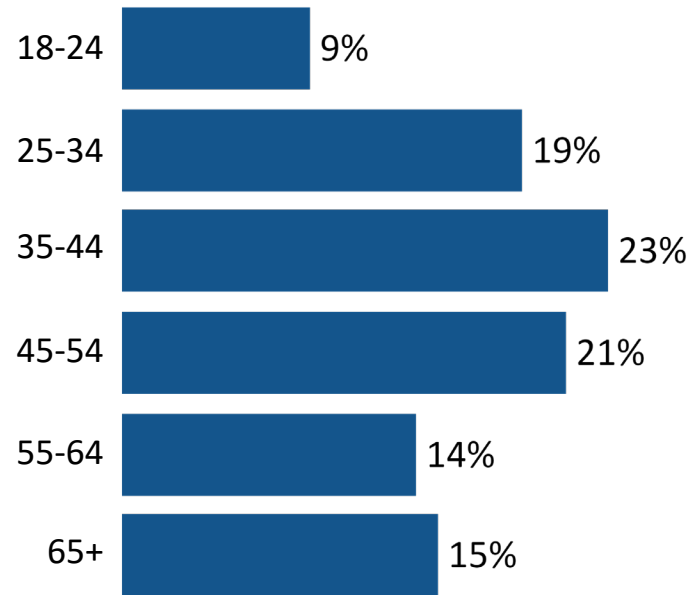
Respondent Demographics



Age, Gender, & Household Income

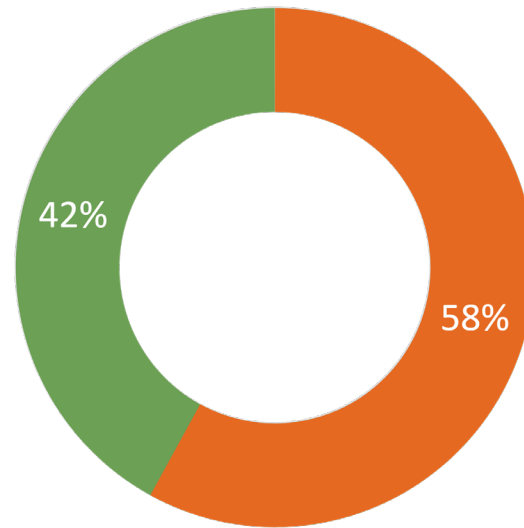
Respondent Demographics for Scottsdale – Overnight Trips 2025

Age



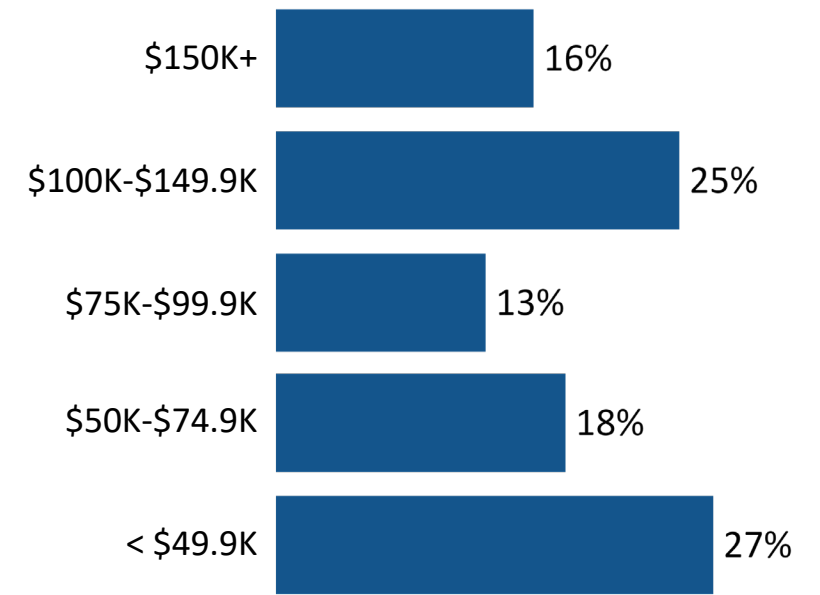
Average Age: 45.6

Gender



Female Male

Household Income

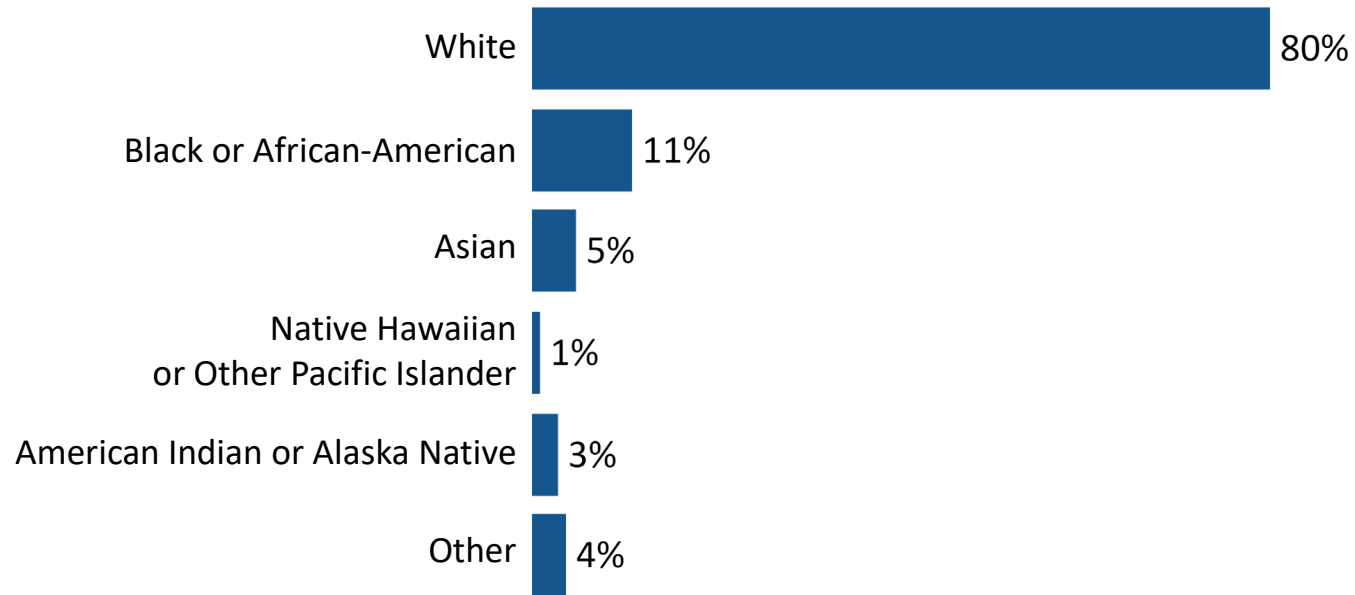


Average Income: \$97.2K

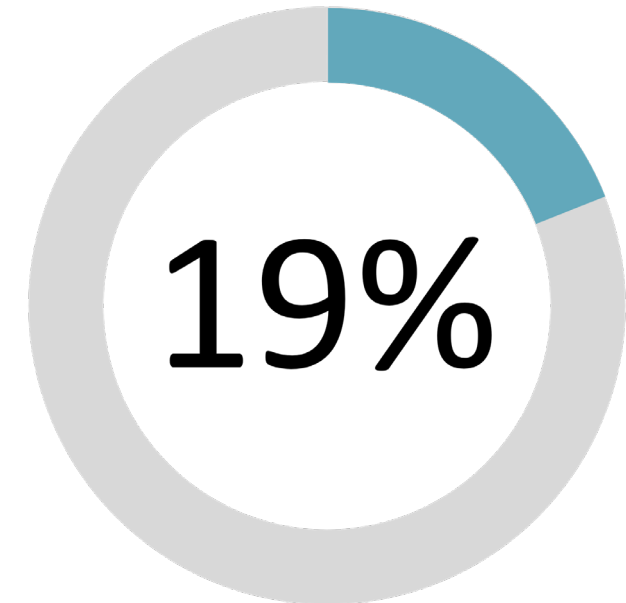
Race & Hispanic Background

Respondent Demographics for Scottsdale – Overnight Trips 2025

Race



Hispanic Background



Race & ethnicity questions and category groupings align with the U.S. Census. These questions are multi-select, self-reported, and respondents have the option not to answer.

Additional Demographics

Respondent Demographics for Scottsdale – Overnight Trips 2025

Employment

67% full-time / self-employed

10% part-time

23% retired / not employed / other

Marital Status

57% married / living with a partner

30% single / never married

12% divorced / widowed / separated

Military Status*

77% never served in the military

10% veteran

10% currently on active duty

5% on active duty for training

Education

15% high school diploma or less / other

15% attended some college

44% associate's or bachelor's degree

25% graduate or professional degree

Sexual Orientation

86% straight

4% gay / lesbian

7% bisexual

3% other / not sure

Household Size

26% 1 member

32% 2 members

15% 3 members

19% 4 members

9% 5+ members

* Multi-select to include status for all household members

Longwoods
INTERNATIONAL

Travel USA®

Day Visitation

Scottsdale 2025



Travel USA® Overview

Methodology

Longwoods International began tracking domestic American travelers in 1985 and has conducted large-scale syndicated visitor research quarterly since 1990.

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.

Each quarter, Longwoods International invites a random, projectable sample of adult members (age 18+) from a major U.S. consumer panel to participate in the Travel USA® survey. Respondents are selected to ensure representativeness of the U.S. adult population.

For analysis, data were weighted on key demographic variables to adjust for any differences between the sample and U.S. population targets derived from the 2020 Census.

Scottsdale's base size for day trips in 2025:

275

This study yields a margin of error of $\pm 3\%$ at a 95% confidence level. Year-over-year (YOY) and U.S. Norm comparisons are considered statistically significant only when results meet or exceed this threshold.

Pre-Trip

Traveler Profiles & Origins



State & DMA of Origin

Top Traveler Markets for Scottsdale – Day Trips 2025

	2025
Arizona	54%
California	17%
Illinois	5%
New Mexico	4%
Washington	2%



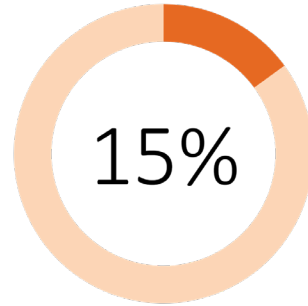
	2025
Phoenix, AZ	41%
Tucson (Nogales), AZ	12%
Los Angeles, CA	12%
Chicago, IL	4%
Albuquerque-Santa Fe, NM	4%

Travel Party Composition

Solo Travelers, Children, & Pets – Day Trips 2025

Solo Travel
Parties

31%

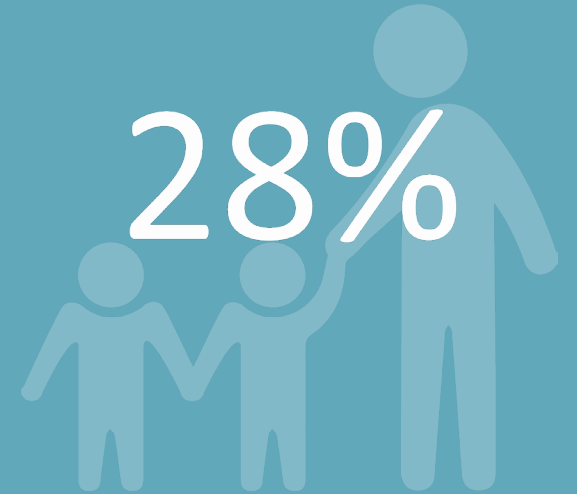


Travel Parties with Pets



Travel Parties
with Children

28%



Travel Party Composition

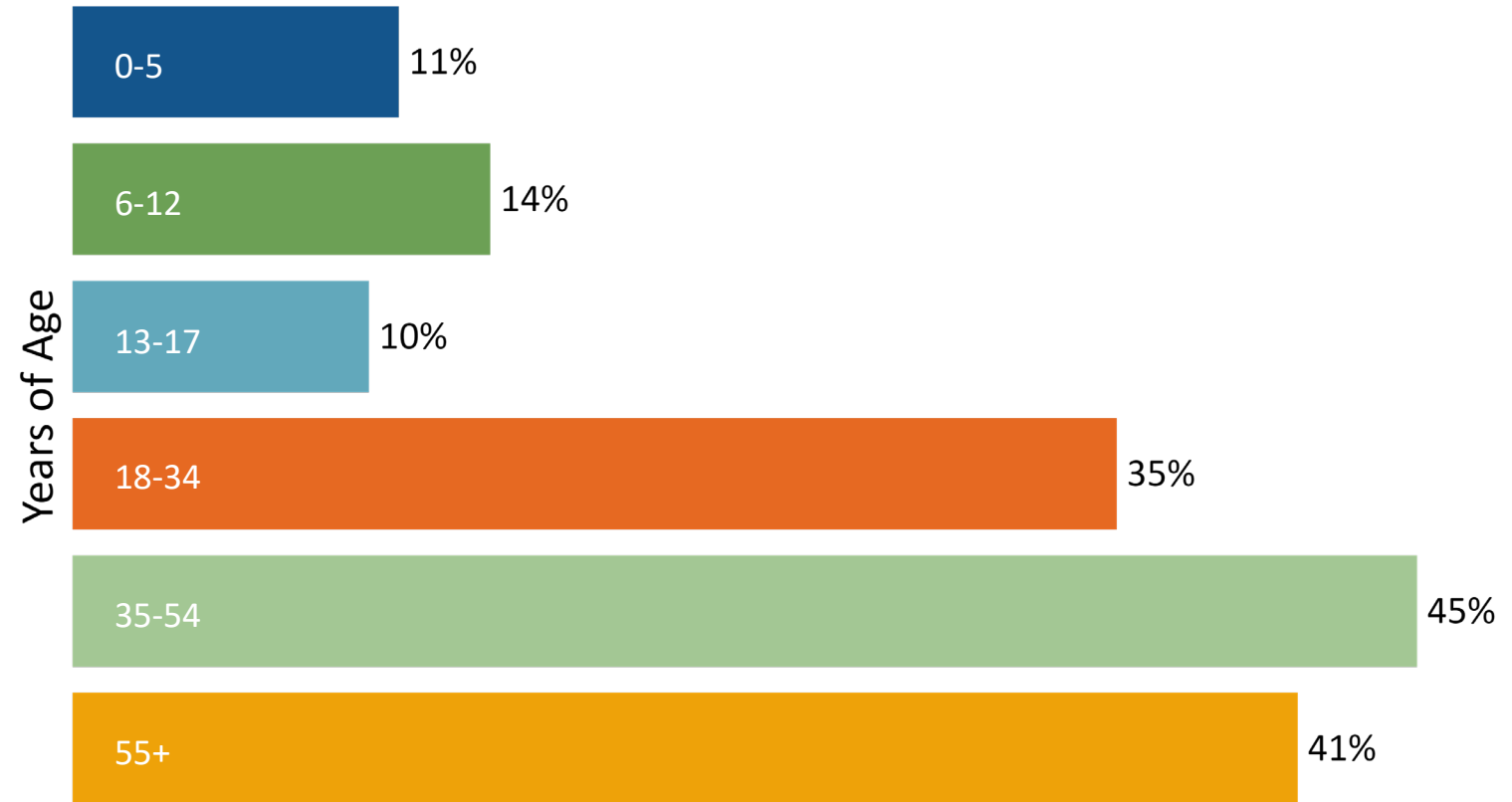
Travel Party Size & Age – Day Trips 2025

Average Travel
Party Size

2.6



Travel Party Age



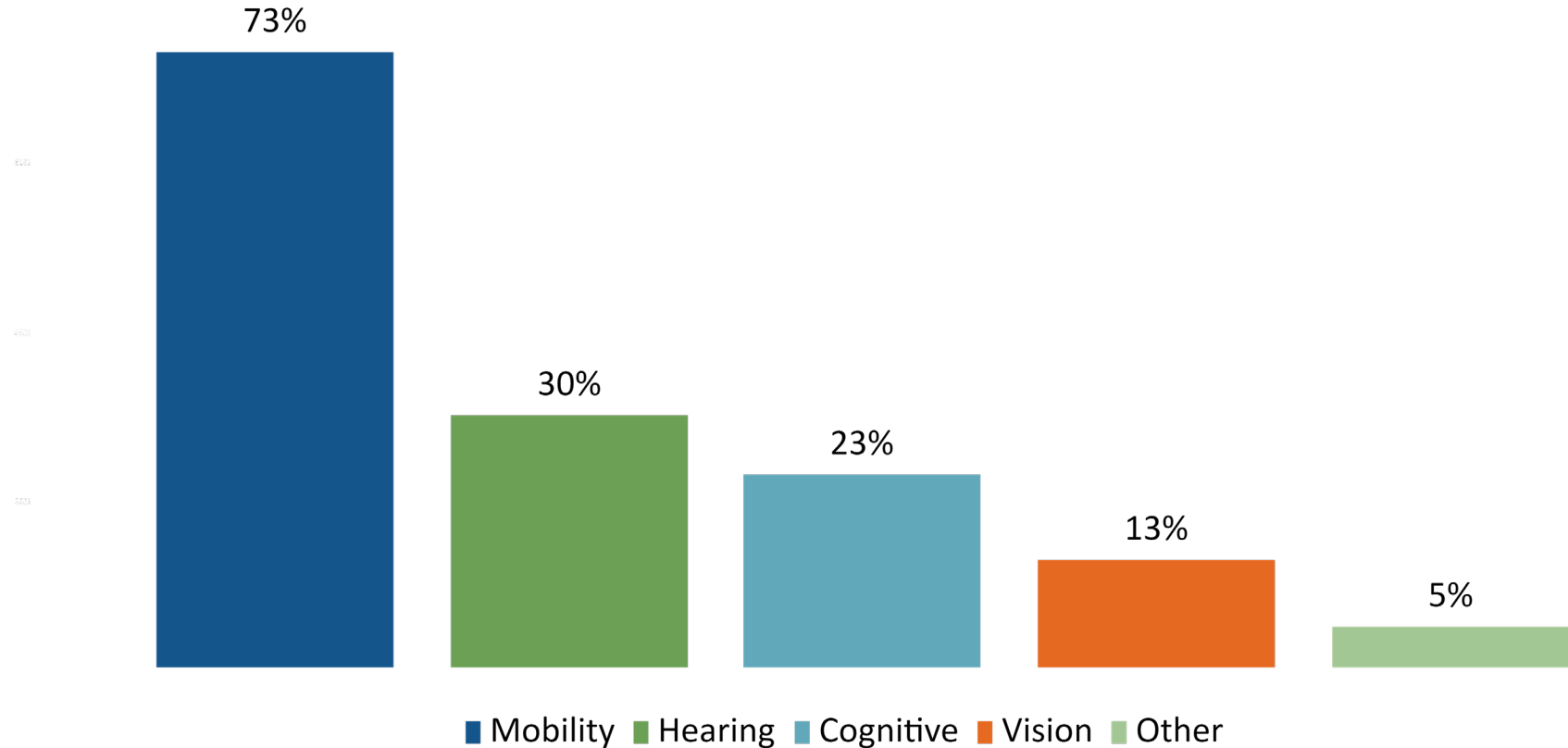
Travelers with Travel-Limiting Disabilities

Disability Categorizations – Day Trips 2025

Travel Parties with
an Individual Who
Required
Accessibility
Services

19%

▲ +3.0% vs U.S. Norm



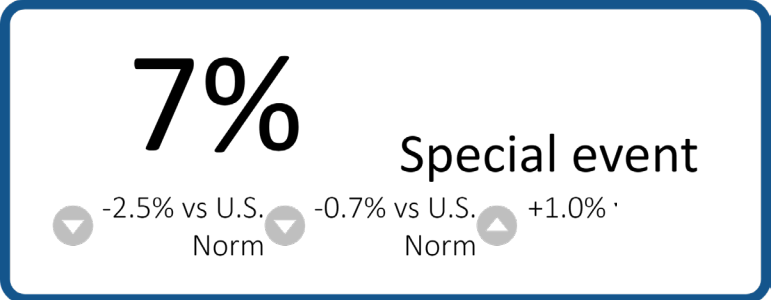
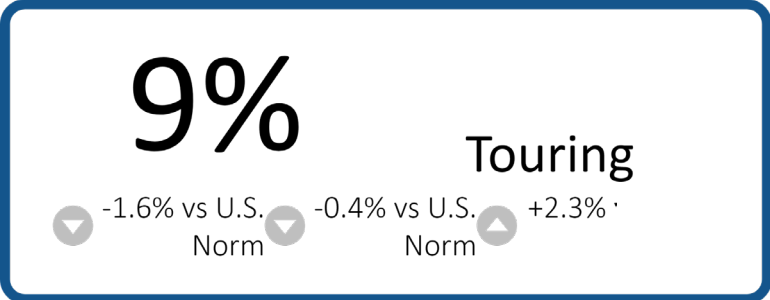
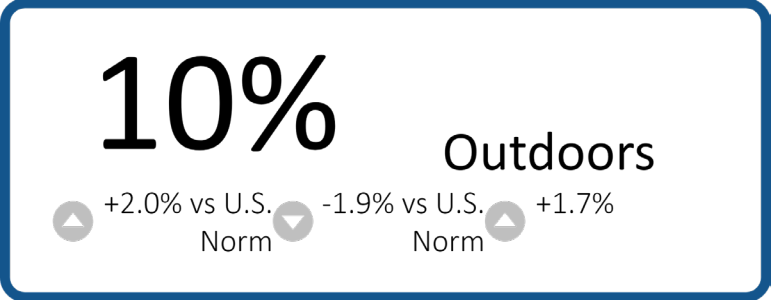
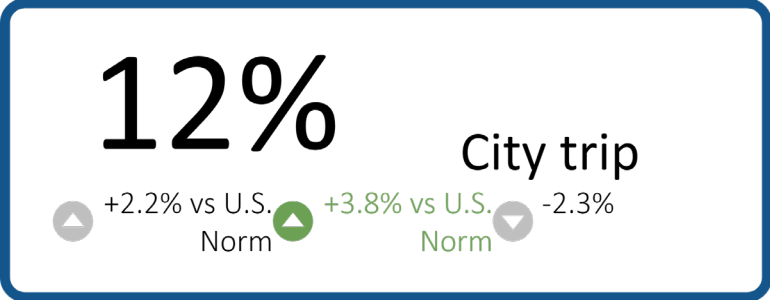
Pre-Trip

Traveler Motivators & Segmentation



Main Purpose of Trip

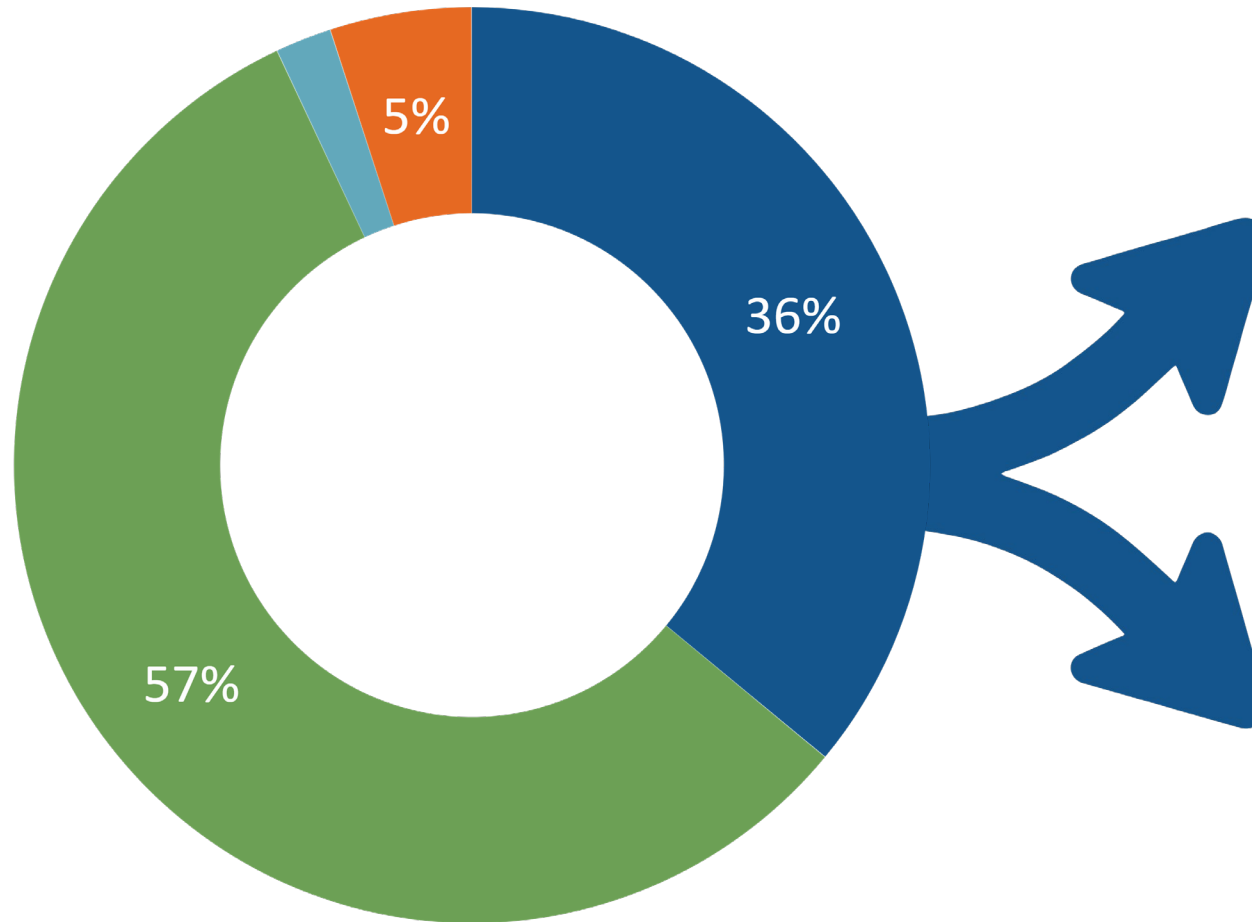
Each respondent selects **one** primary motivator for their trip



Market Segmentation

A Macro View of Travelers' Main Purpose of Trip – Day Trips 2025

- Visiting friends/relatives
- Marketable
- Business-leisure
- Business



90%

Visited Friends/Relatives Who Live in Scottsdale

10%

Met Friends/Relatives in Scottsdale Who Live Elsewhere

Top Traveler Personas

Each respondent selects **one** persona that most closely describes their travel style

26%

Budget friendly traveler: prioritizing affordability and value for money

11%

Culture/heritage/history seeker: seeking local cultures, historical sites, and engaging with local traditions

11%

Business traveler: traveling for work purposes, prioritizing convenience connectivity

11%

Family traveler: prioritizing activities and accommodations suitable for children

9%

Outdoor & adventure seeker: drawn to outdoor activities and thrill-seeking

8%

Luxury traveler: seeking high-end experiences and personalized services

During Trip

Destination Activities



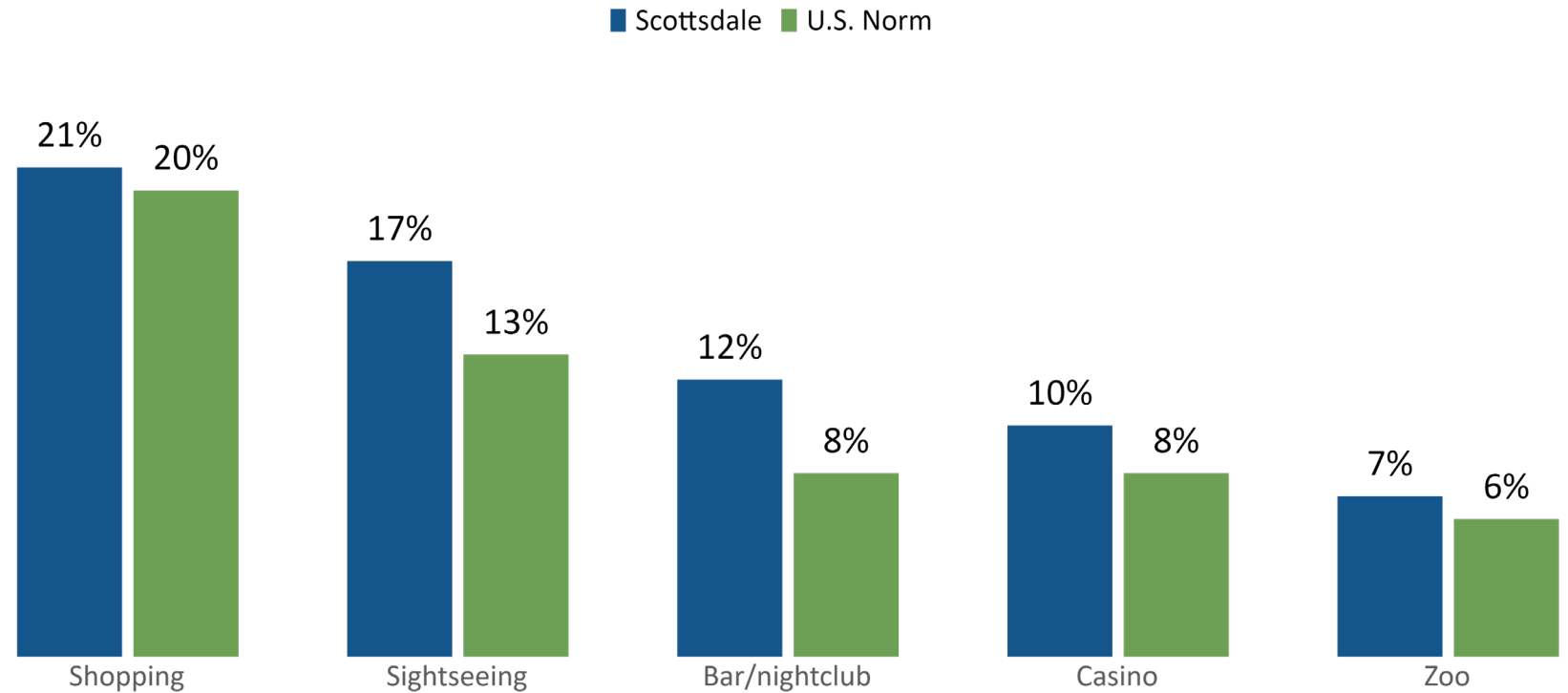
Entertainment Activities

Top Entertainment Activities for Scottsdale Travelers – Day Trips 2025

53%

Participated in
Entertainment
Activities
During Their Trip

U.S. Norm: 51%



Recreational Activities

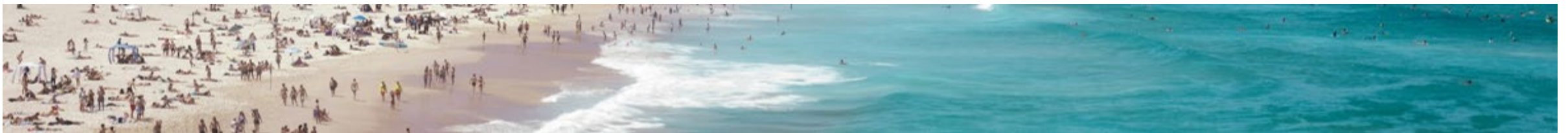
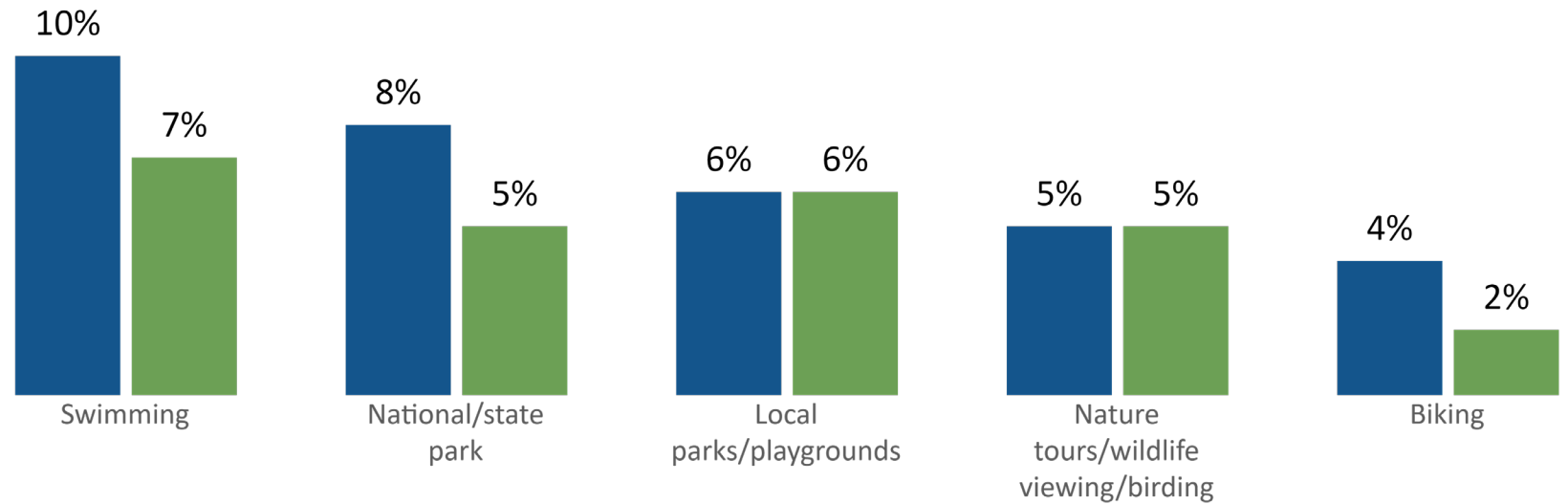
Top Recreational Activities for Scottsdale Travelers – Day Trips 2025

42%

Participated in
Recreational
Activities
During Their Trip

U.S. Norm: 36%

■ Scottsdale ■ U.S. Norm



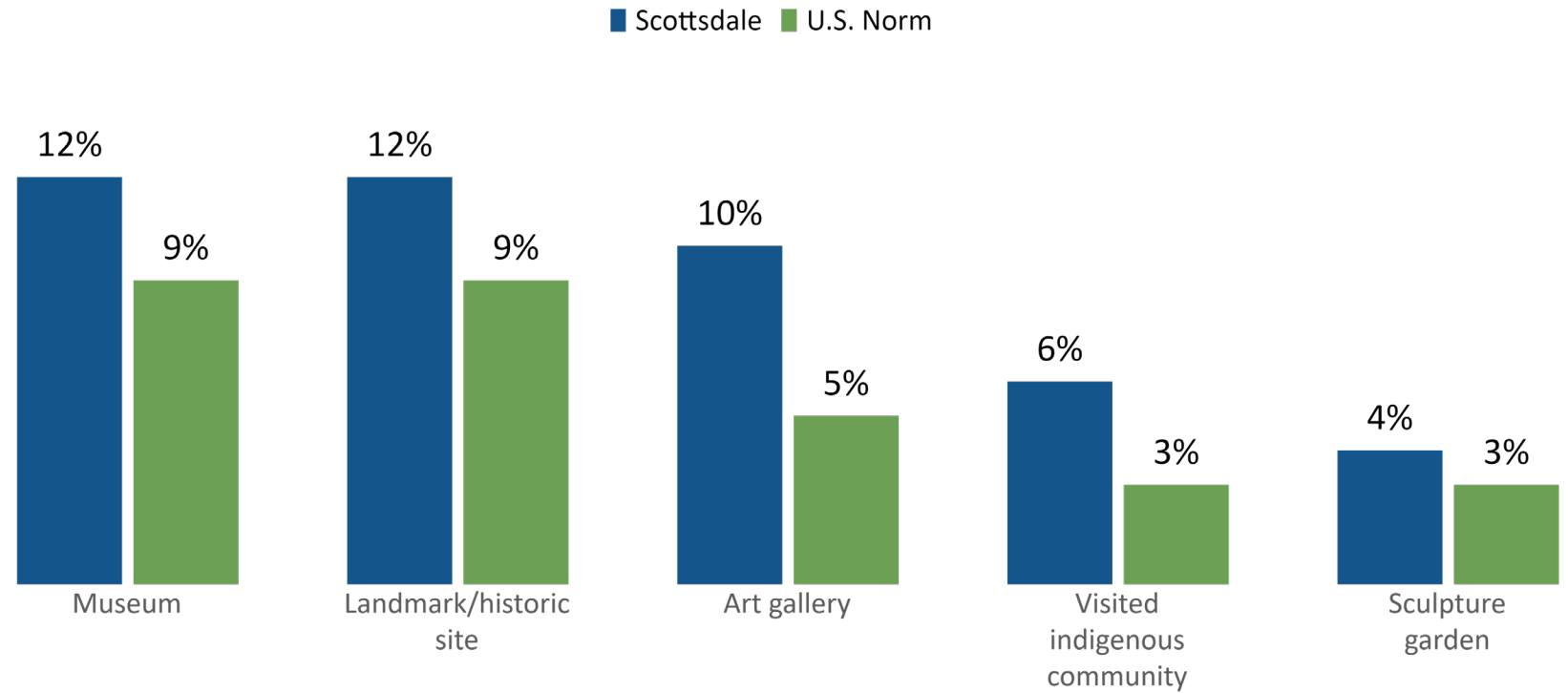
Cultural Activities

Top Cultural Activities for Scottsdale Travelers – Day Trips 2025

29%

Participated in
Cultural
Activities
During Their Trip

U.S. Norm: 23%



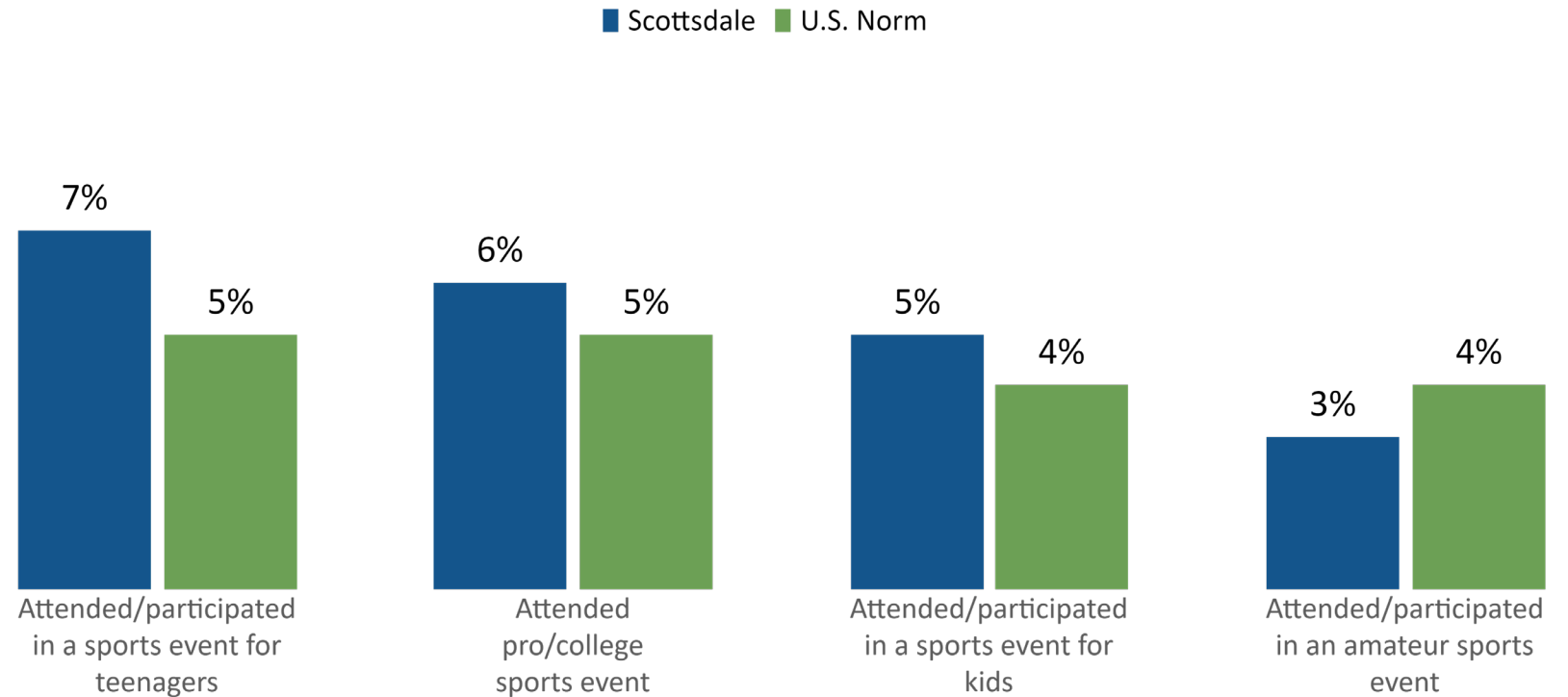
Sporting Events

Top Sporting Events for Scottsdale Travelers – Day Trips 2025

16%

Participated in
Sporting
Events
During Their Trip

U.S. Norm: 14%



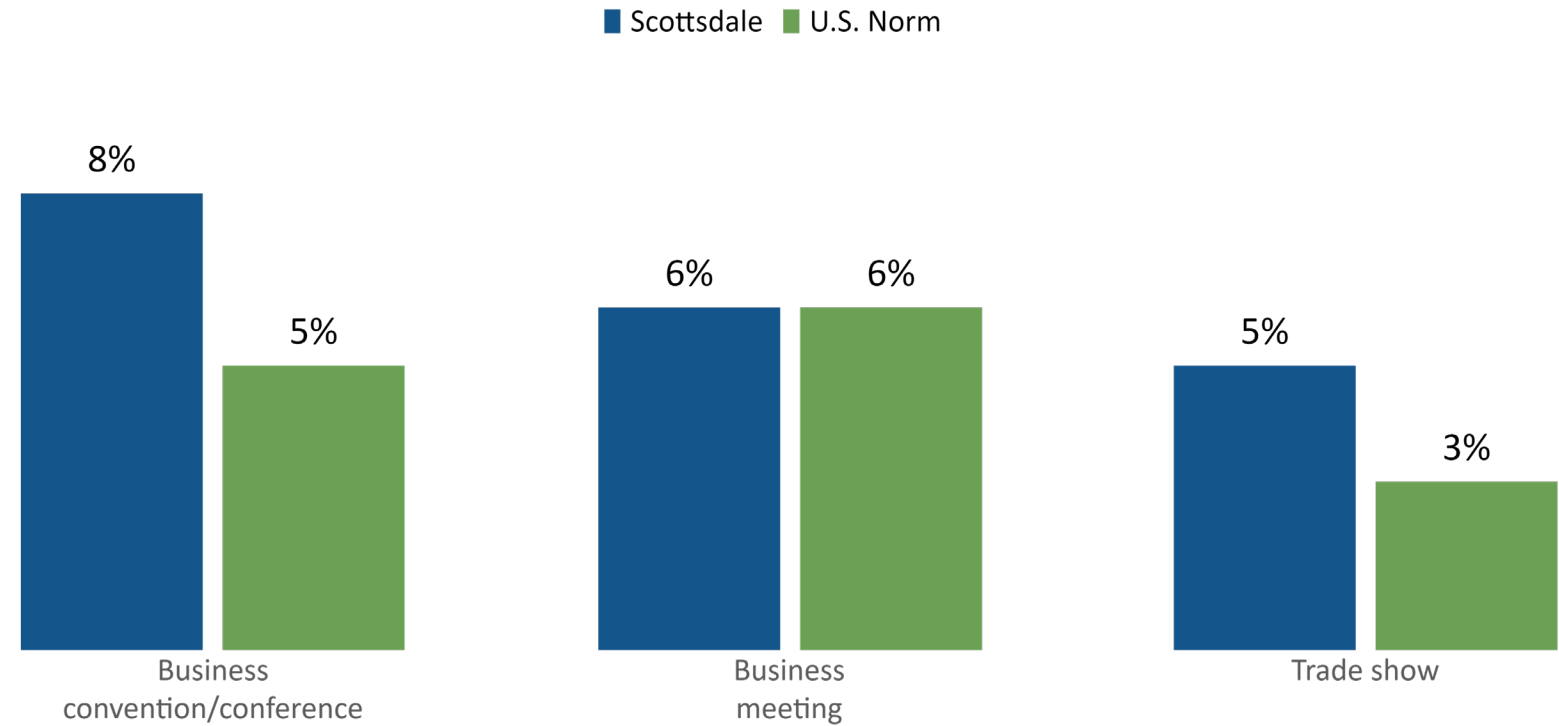
Business Activities

Top Business Activities for Scottsdale Travelers – Day Trips 2025

17%

Participated in
Business
Activities
During Their Trip

U.S. Norm: 12%



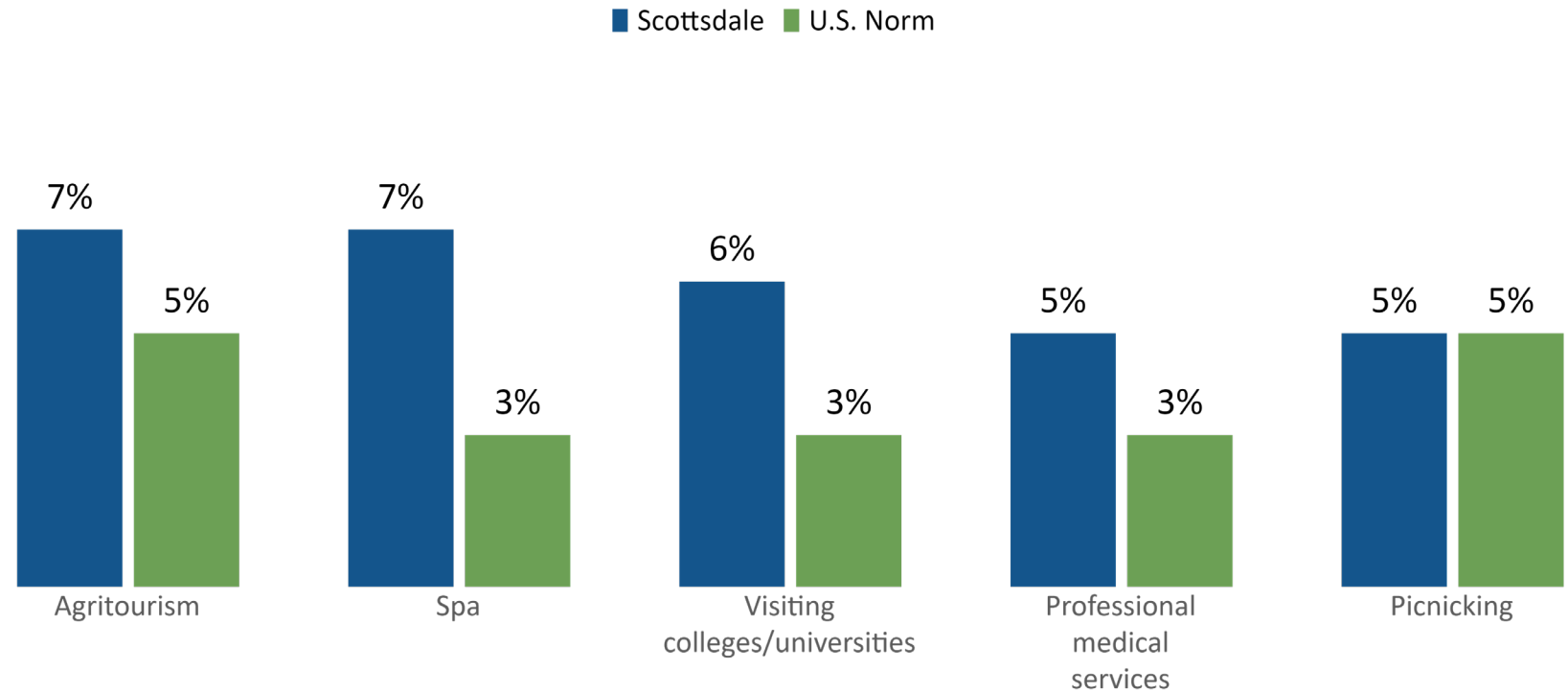
Other Activities

Top Other Activities for Scottsdale Travelers – Day Trips 2025

31%

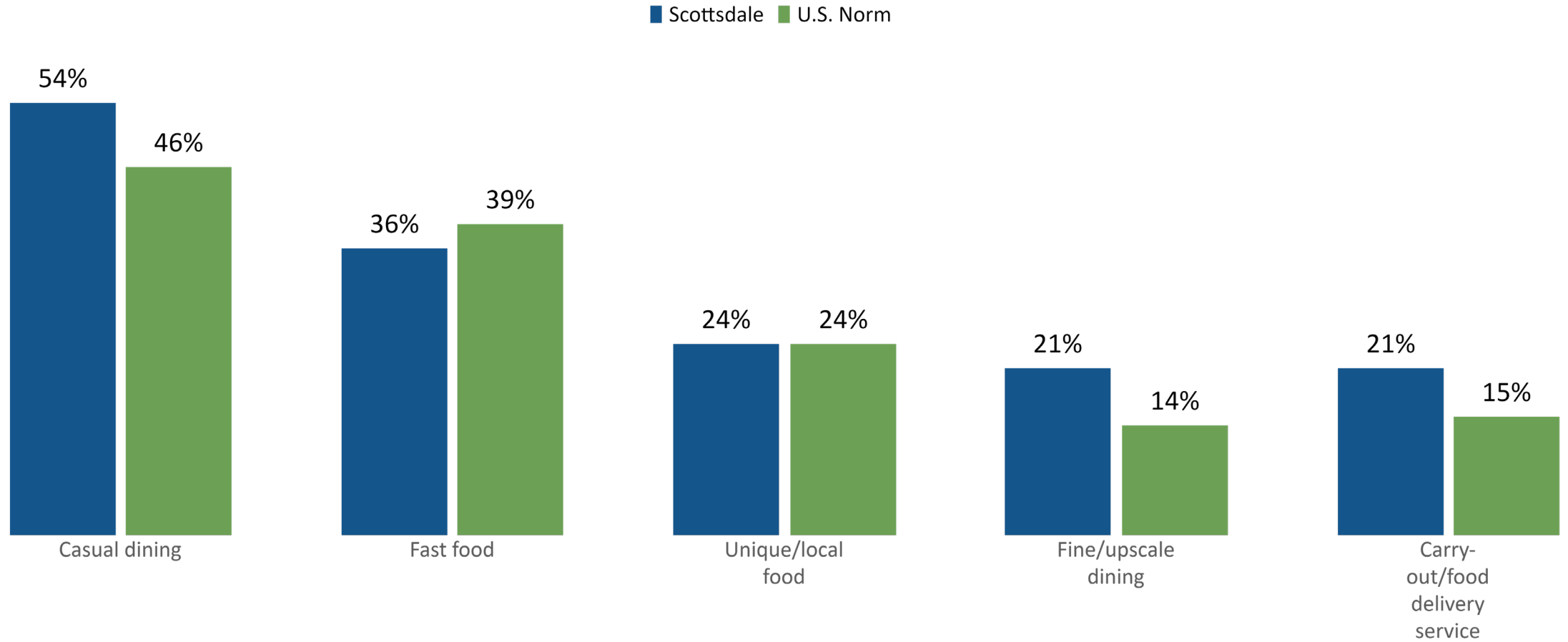
Participated in
Other
Activities
During Their Trip

U.S. Norm: 30%



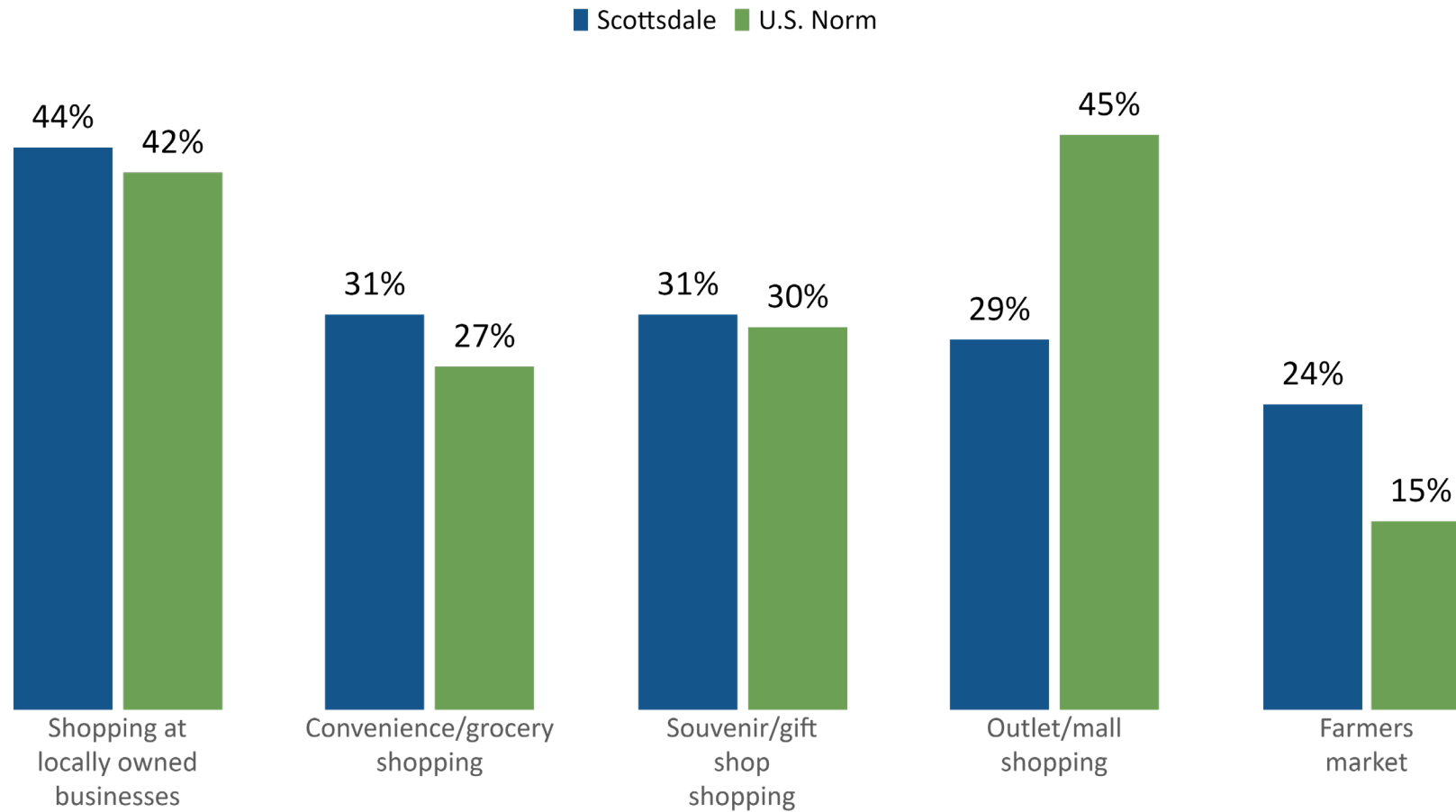
Dining

Top Dining Categories for Scottsdale Travelers – Day Trips 2025



Shopping

Top Shopping Categories for Scottsdale Travelers – Day Trips 2025



This question is only asked of travelers who selected 'shopping' as an activity during their trip to Scottsdale.

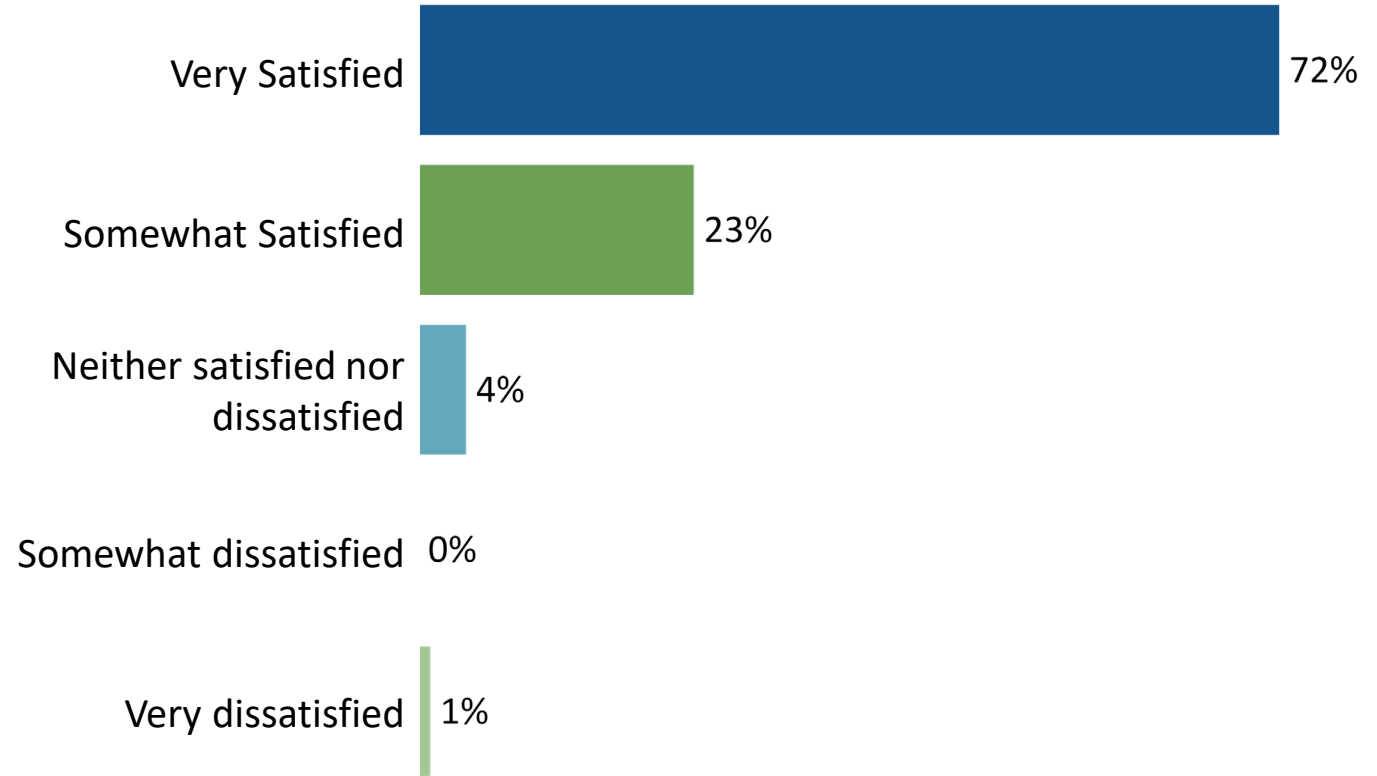
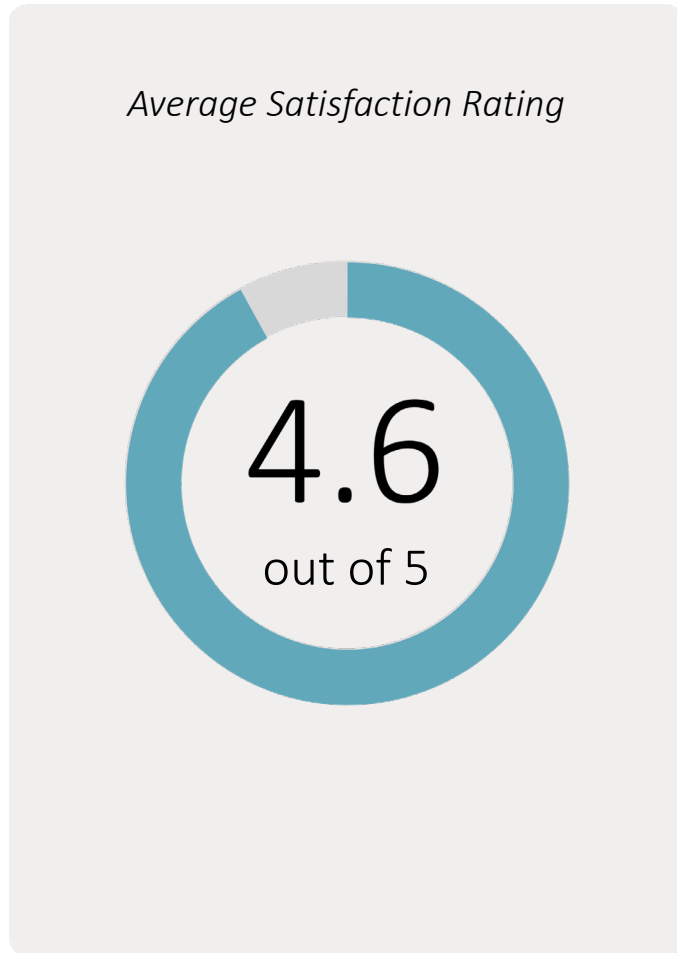
Post-Trip

Traveler Satisfaction & Retention



Satisfaction with Overall Trip

How Day Visitors Rated Their Scottsdale Experience – Day Trips 2025



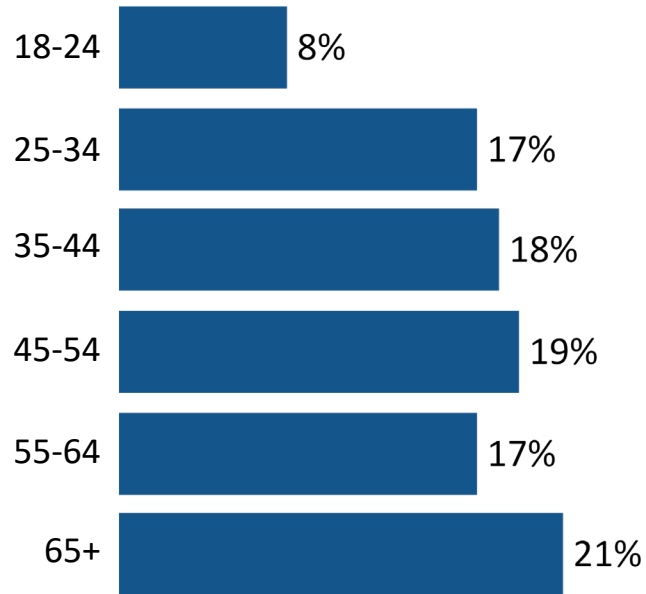
Respondent Demographics



Age, Gender, & Household Income

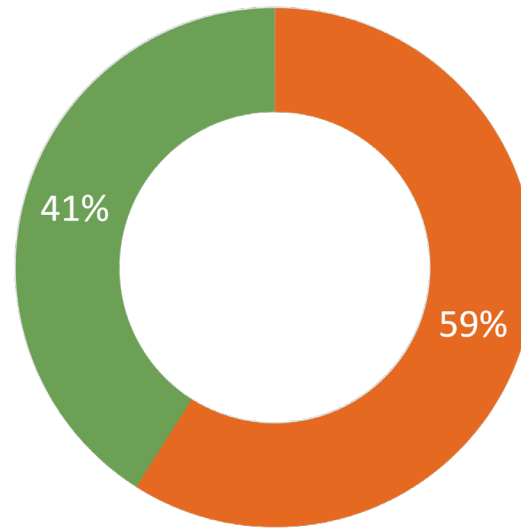
Respondent Demographics for Scottsdale – Day Trips 2025

Age



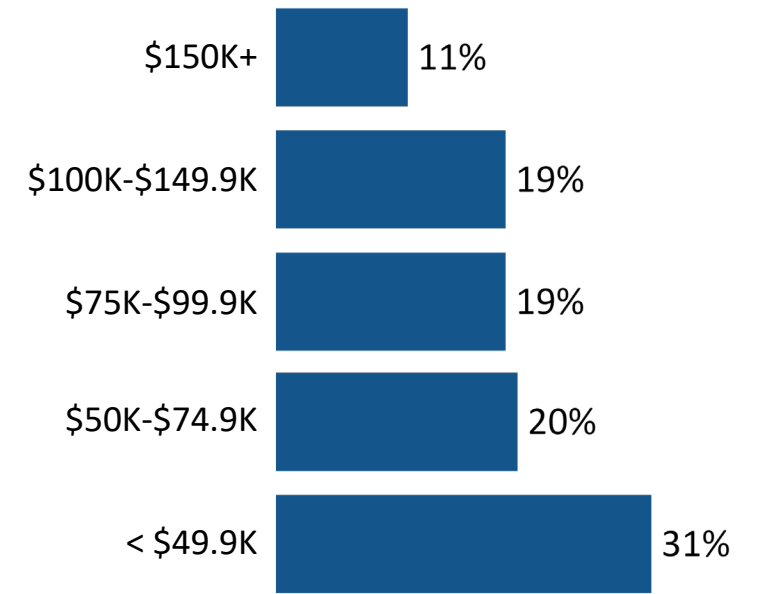
Average Age: 48.7

Gender



Female Male

Household Income

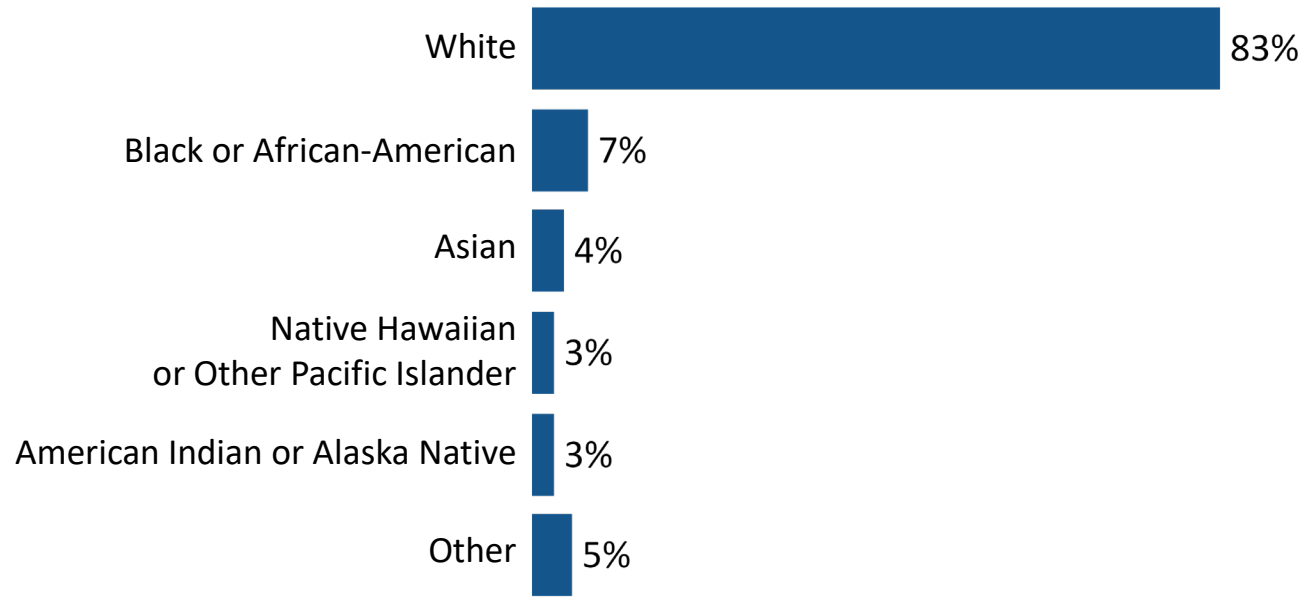


Average Income: \$84.8K

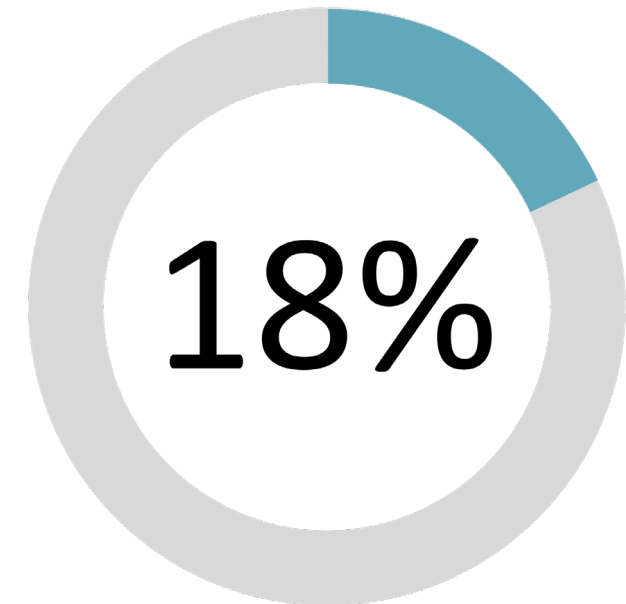
Race & Hispanic Background

Respondent Demographics for Scottsdale – Day Trips 2025

Race



Hispanic Background



Race & ethnicity questions and category groupings align with the U.S. Census. These questions are multi-select, self-reported, and respondents have the option not to answer.

Additional Demographics

Respondent Demographics for Scottsdale – 2025 Day Trips

Employment

56% full-time / self-employed

8% part-time

36% retired / not employed / other

Marital Status

52% married / living with a partner

26% single / never married

22% divorced / widowed / separated

Military Status*

85% never served in the military

7% veteran

3% currently on active duty

5% on active duty for training

Education

19% high school diploma or less / other

21% attended some college

41% associate's or bachelor's degree

19% graduate or professional degree

Sexual Orientation

86% straight

6% gay / lesbian

7% bisexual

1% other / not sure

Household Size

26% 1 member

36% 2 members

17% 3 members

14% 4 members

7% 5+ members

* Multi-select to include status for all household members

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