



Scottsdale 2016 Visitor Research

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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 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 2016.

Research Objectives

- ✓ 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:
 - Selected to be representative of the U.S. adult population
- For the 2016 travel year, this yielded :
 - 308,946 trips for analysis nationally:
 - 216,738 overnight trips
 - 92,208 day trips
- For Scottsdale, the following sample was achieved for the 2016 report:
 - 1.026 trips:
 - 659 overnight trips
 - 367 day trips (2015/2016 Combined Sample)
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Analytical Note

- The Day Trip results in this report are based on two time frames:
 - Market size and structure estimates are reported for the 2016 travel year
 - To maximize statistical reliability, other data (trip characteristics and demographic profiles) are based on two years' combined sample from 2015 and 2016 unless otherwise indicated.



Key Findings



Key Findings

- In 2016, Scottsdale had 8.8 million person trips, increasing 1.8% from 2015. 51% were overnight trips and 49% were day trips.
- The overnight trips generated \$1.22 billion in spending, increasing 3.4% from 2015.
- “Visiting friends and relatives” (at 46%) was the most frequent purpose for an overnight trip to Scottsdale. Marketable trips (those influenced by marketing efforts) were 40% of the total overnight trips. The most prevalent marketable trip purpose was touring through the region.
- The top state origin markets for overnight visitors to Scottsdale were California, Arizona, and Illinois. Among DMAs, the top three visitor sources were Phoenix, Los Angeles, and Chicago.

Key Findings (Cont'd)

- Over two-thirds (67%) of Scottsdale visitors were very satisfied with the overall trip experience. The next highest satisfaction elements were Quality of Food at 61% and Quality of Accommodations at 58%.
- Seventy-eight (78%) percent of overnight visitors have visited Scottsdale at least once before, while 67% percent had visited in the past year.
- Overnight trips to Scottsdale are planned further in advance than the national average, with 67% planned two months or more ahead vs. 53% nationally.
- “Airline/commercial carrier,” “hotel or resort,” and “online travel agencies” were the most common planning sources for a Scottsdale overnight trip. “Airline/commercial carrier” was the most common booking source.

Key Findings (Cont'd)

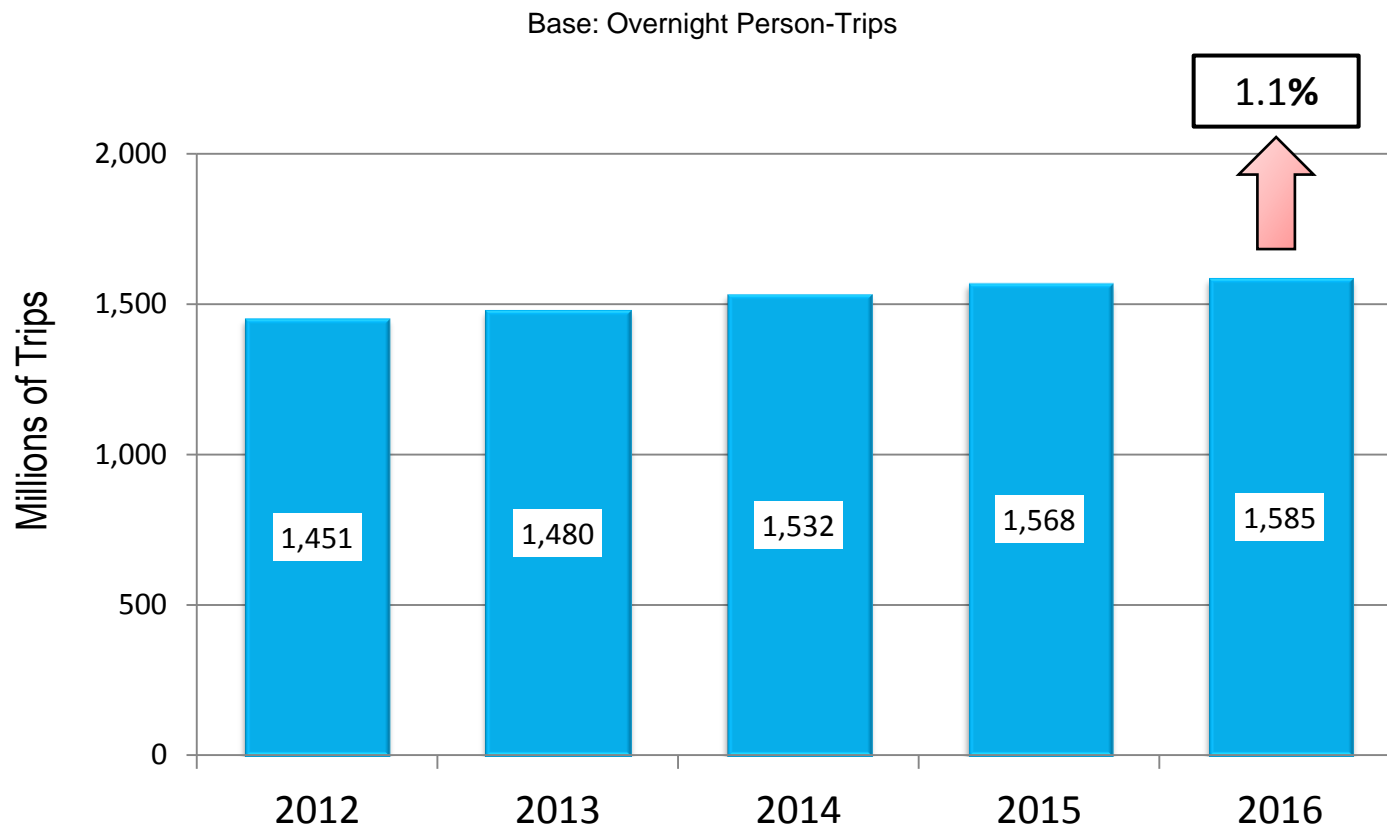
- The average number of nights spent in Scottsdale for an overnight trip was 4.1 nights, up from 3.9 nights in 2015. The average travel party size was 2.9 persons.
- Scottsdale has a much higher percentage of travelers using an airplane (43% vs 23%) or rental car (40% vs 19%) for their trip than the national average. Conversely, 50% of Scottsdale overnight travelers utilized their personal car or truck during the trip vs 67% nationally. The use of car services like Uber and Lyft increased from 7% in 2015 to 12% in 2016, while use of a traditional taxi remained at 11%.
- The top five activities and experiences during an overnight trip to Scottsdale were “Shopping,” “Fine Dining,” “Swimming,” “Casino,” and “Landmark/Historic Site.”



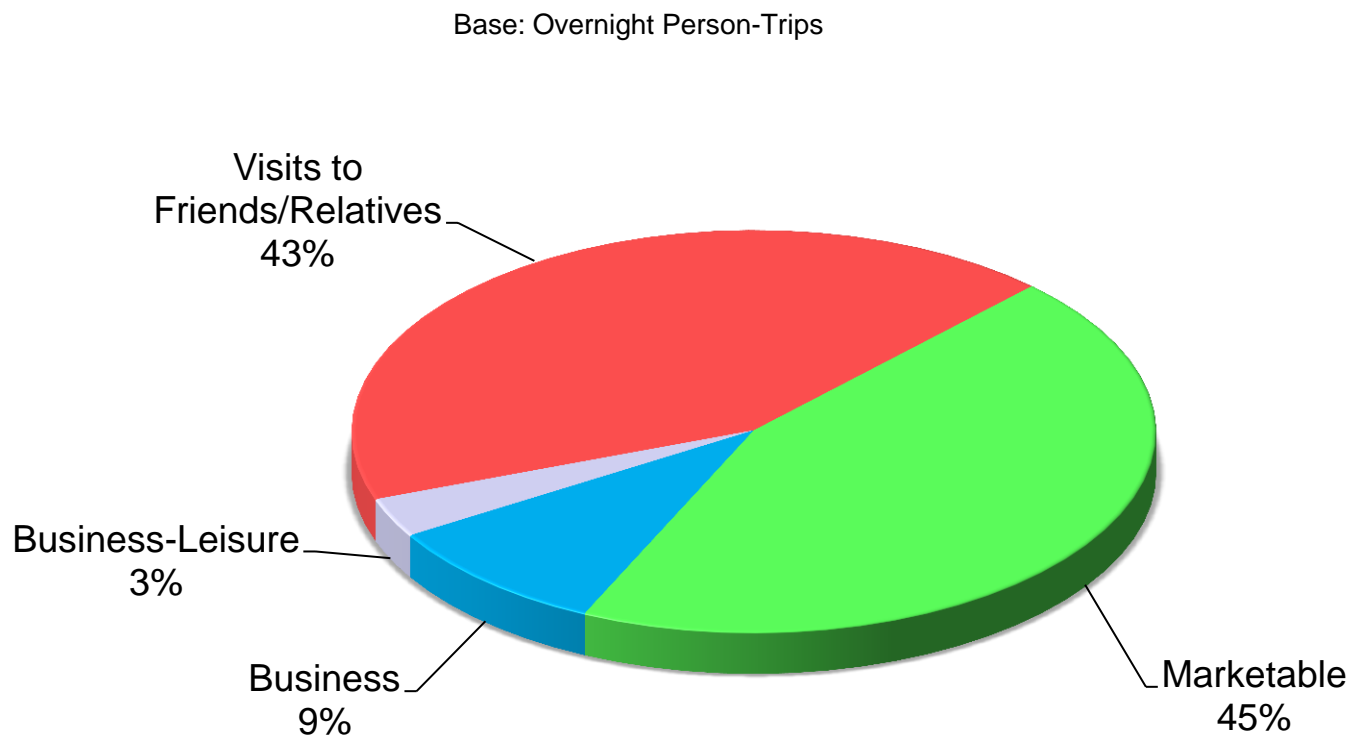
Size & Structure of the U.S. Travel Market



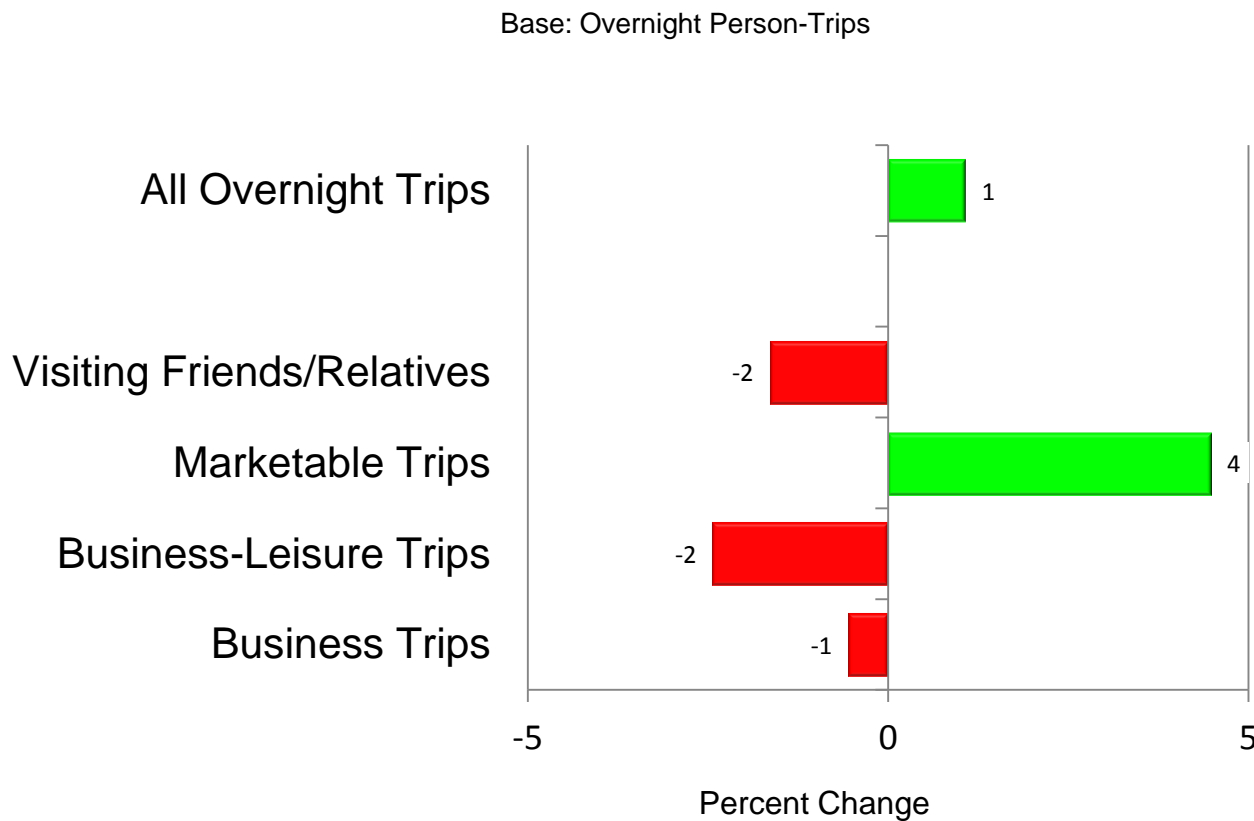
Total Size of the U.S. Travel Market — 2012-2016



Structure of the U.S. Travel Market — 2016 Overnight Trips



U.S. Market Trends for Overnight Trips — 2016 vs. 2015





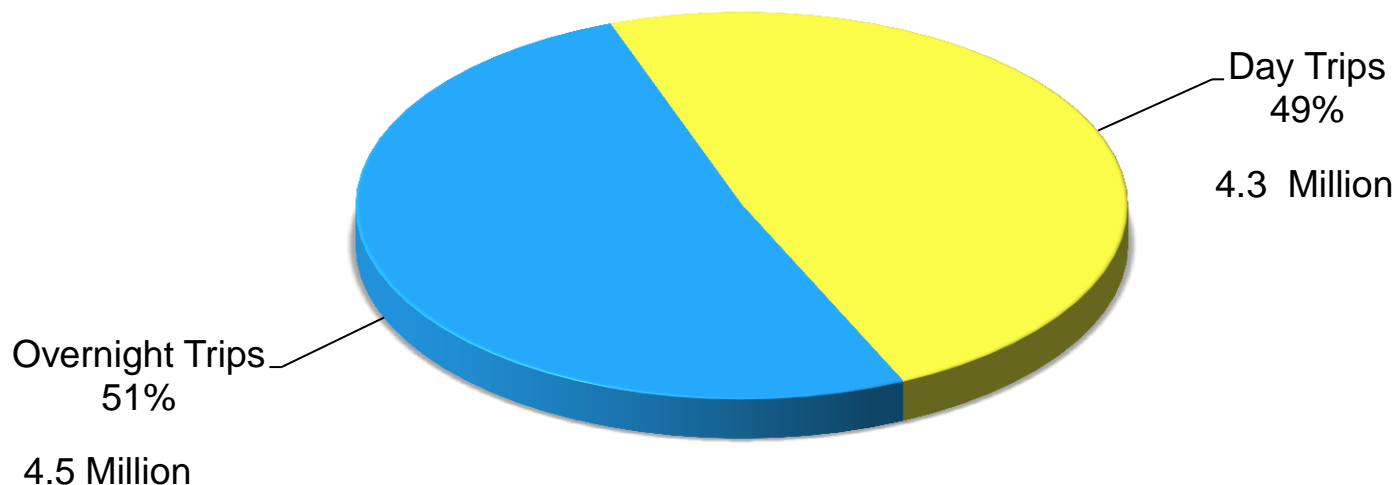
Size & Structure of Scottsdale Domestic Travel Market



Total Size of Scottsdale 2016 Domestic Travel Market

Total Person-Trips = 8.8 Million

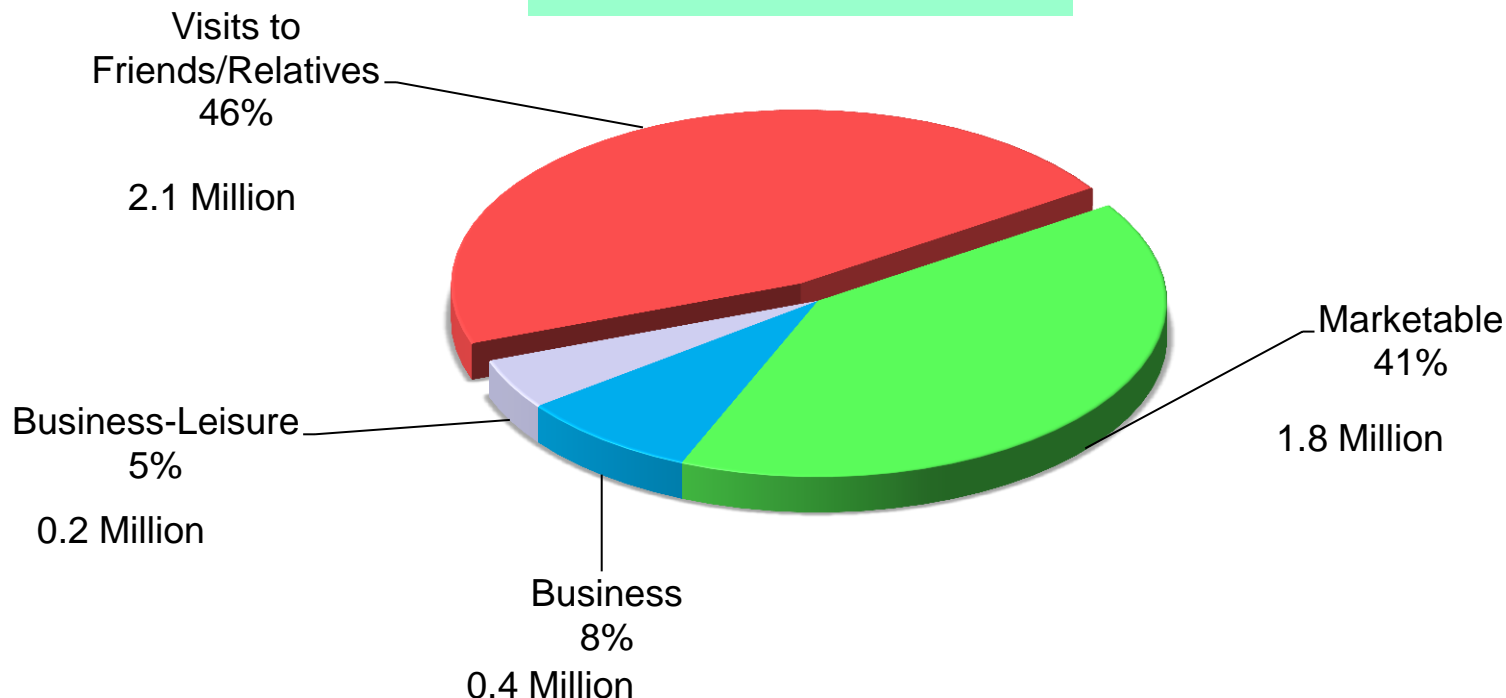
+1.8% vs. 2015



Scottsdale's Overnight Travel Market — by Trip Purpose

Total Overnight Person-Trips = 4.5 Million

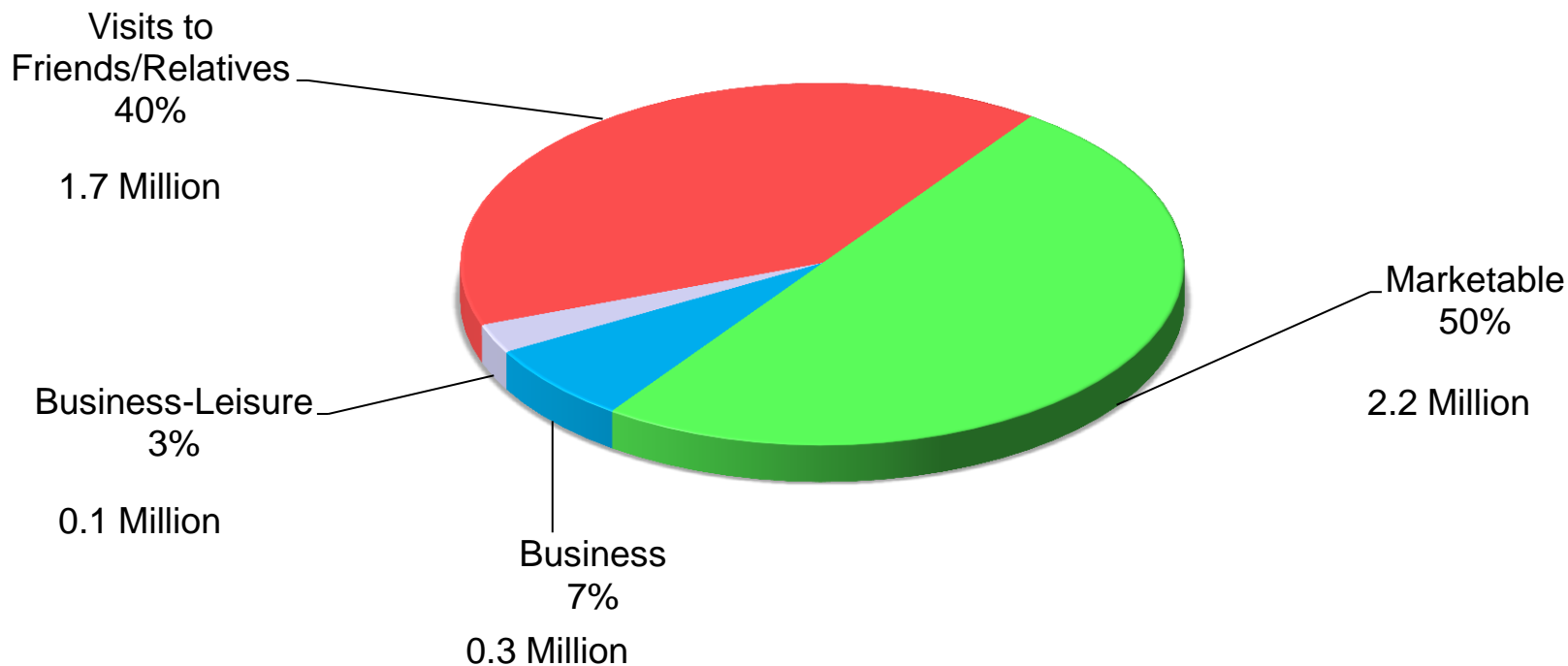
+1.3% vs. 2015



Scottsdale Day Travel Market — by Trip Purpose

Total Day Person-Trips = 4.3 Million

+2.2% vs. 2015





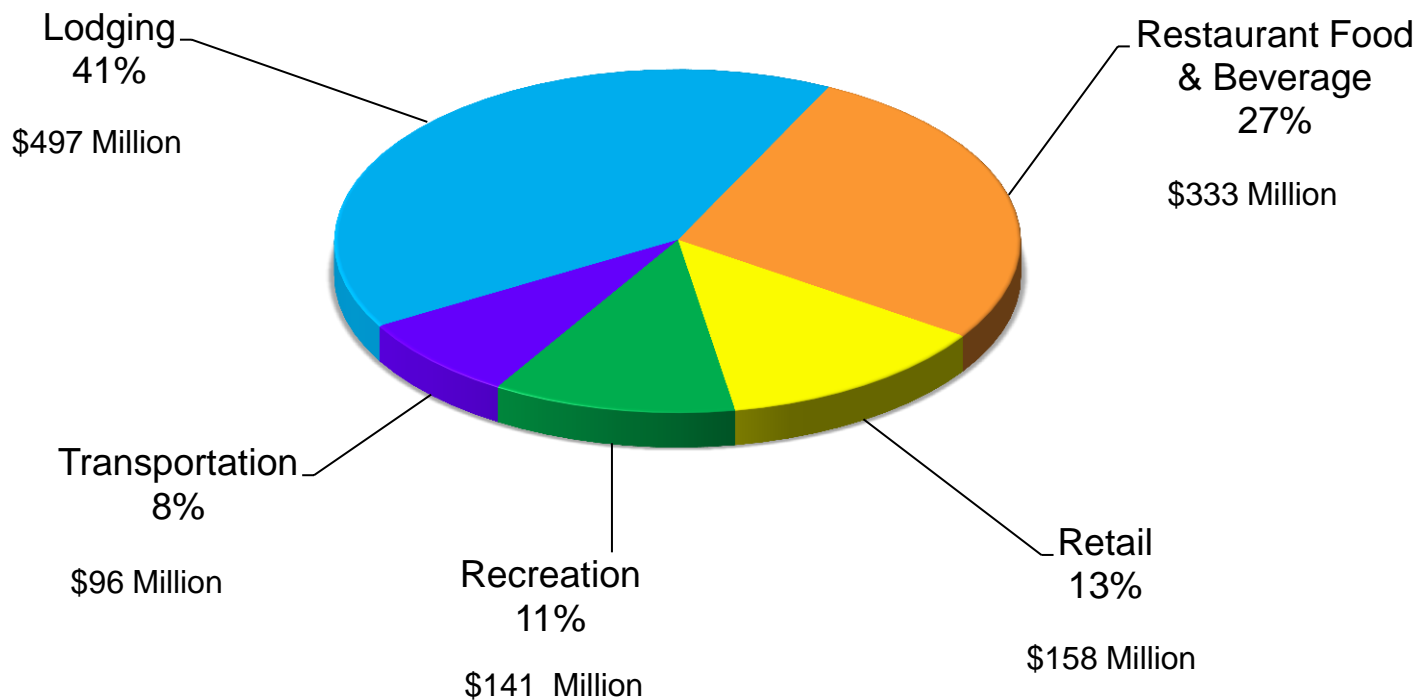
Overnight Trip Expenditures



Domestic Overnight Expenditures — by Sector

Total Spending = \$1.225 Billion

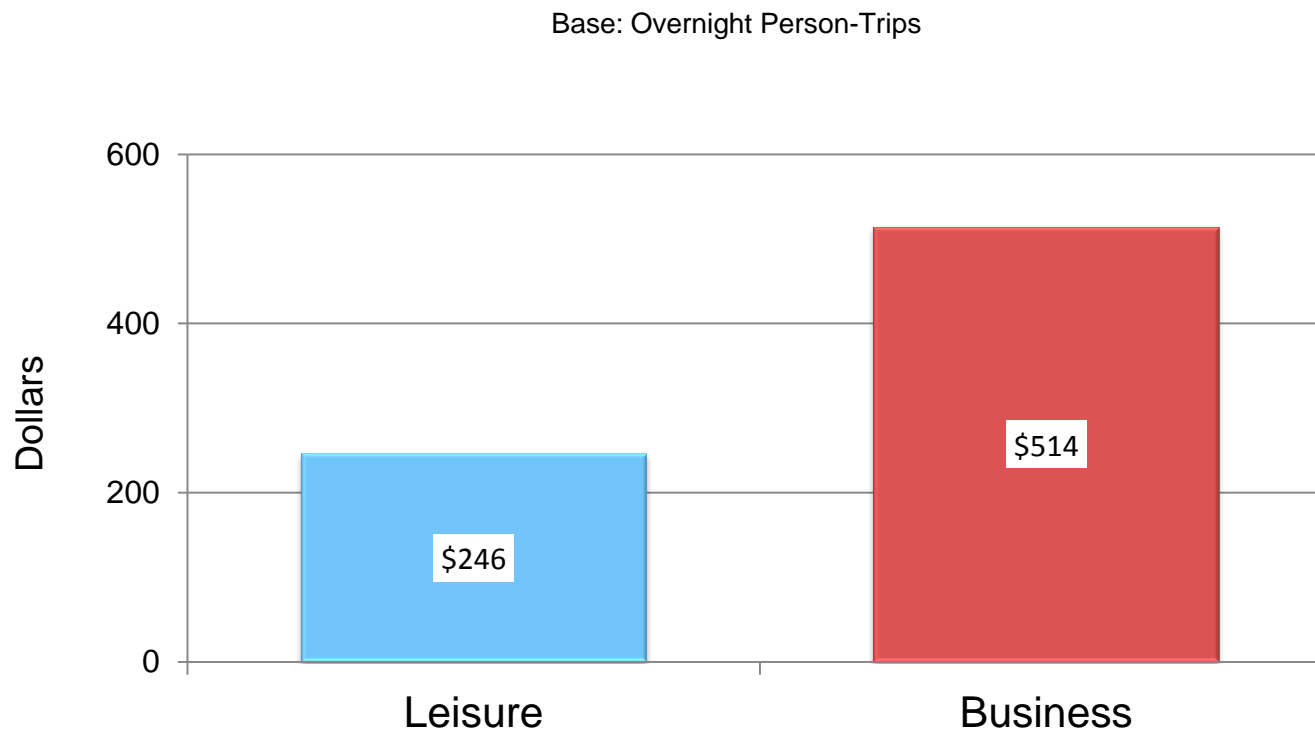
+3.4% vs. 2015



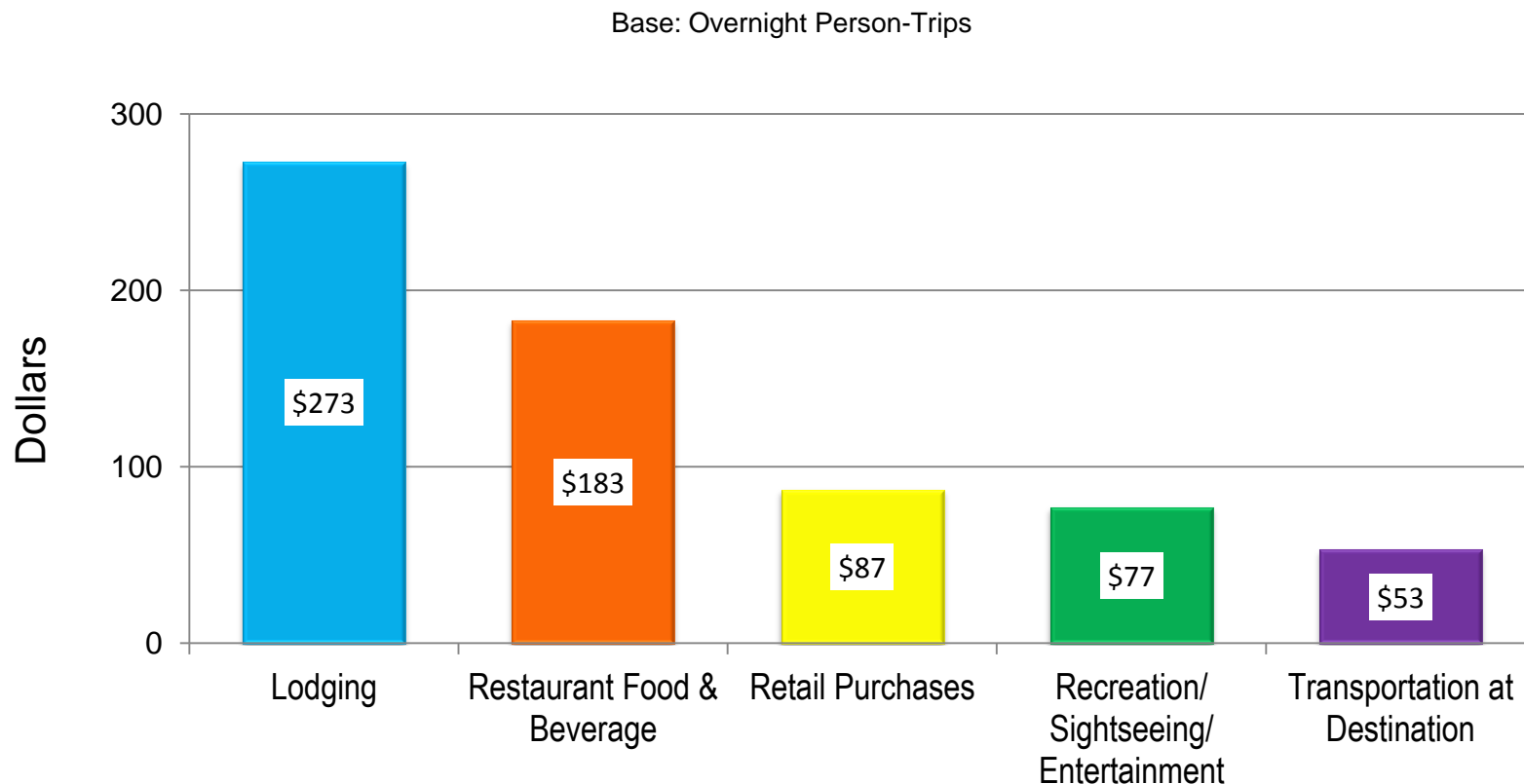
Average Per Person Expenditures on Domestic Overnight Trips — By Sector



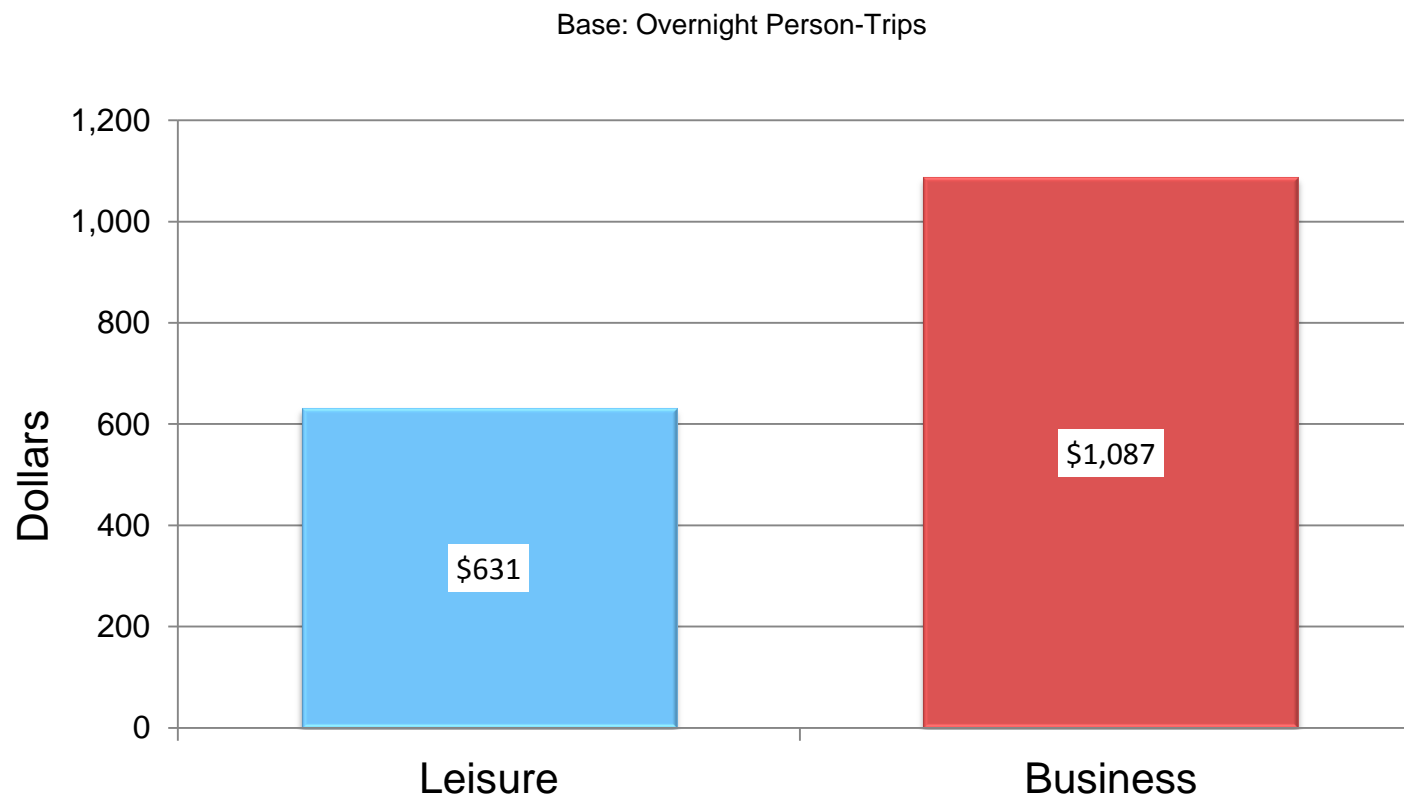
Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose



Average Per Party Expenditures on Domestic Overnight Trips — By Sector



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



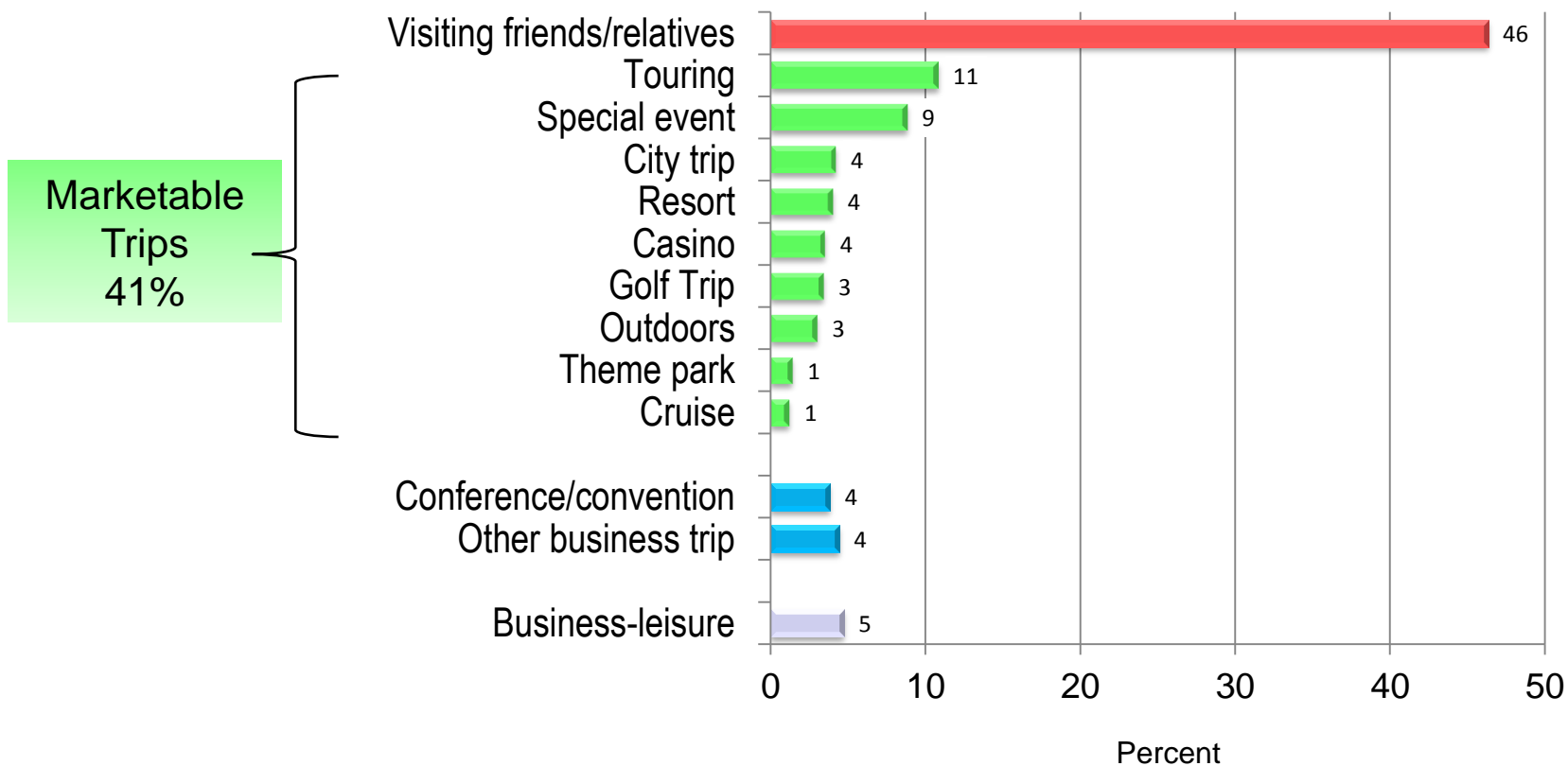


Overnight Trip Characteristics

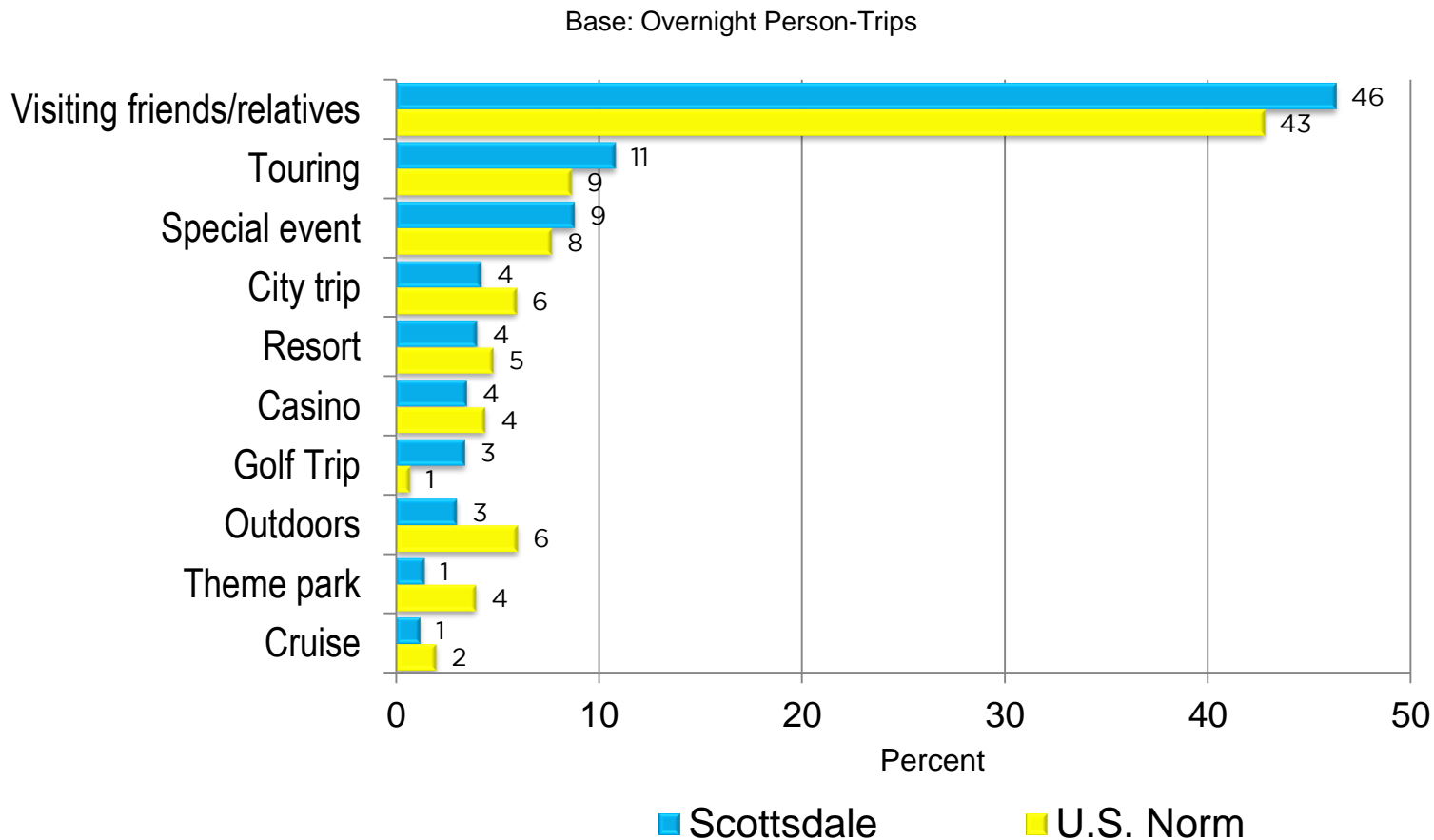


Main Purpose of Trip

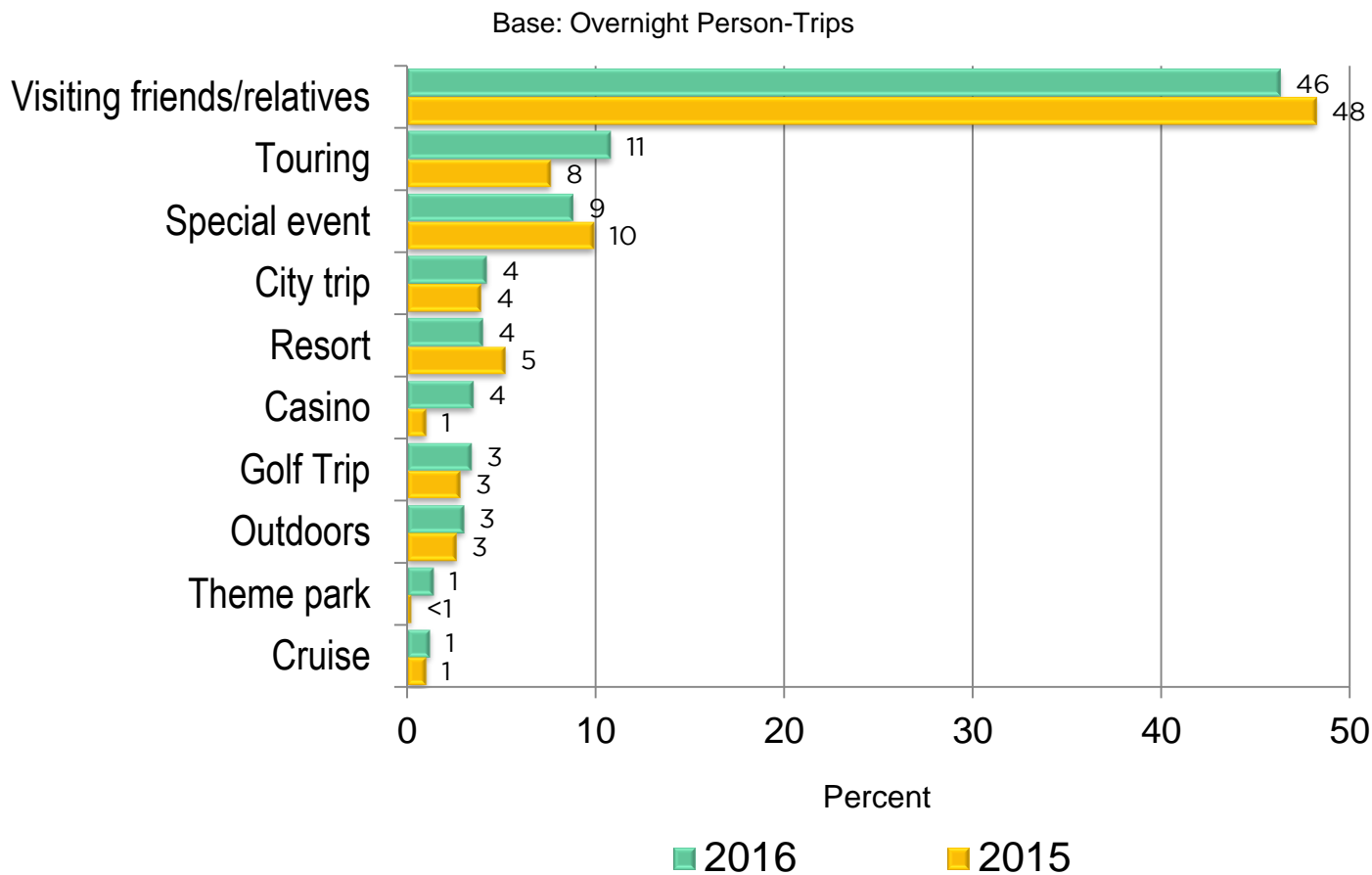
Base: Overnight Person-Trips



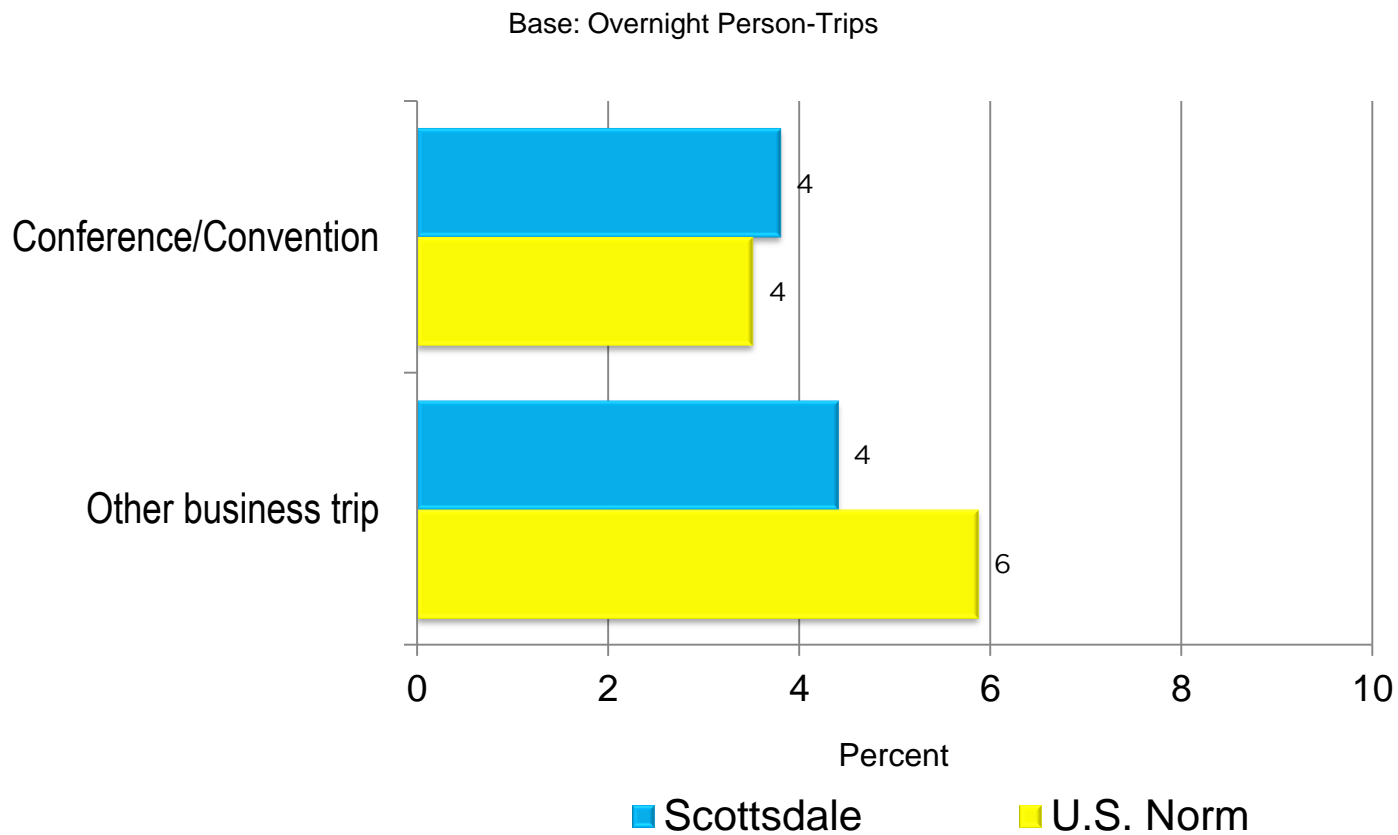
Main Purpose of Leisure Trip



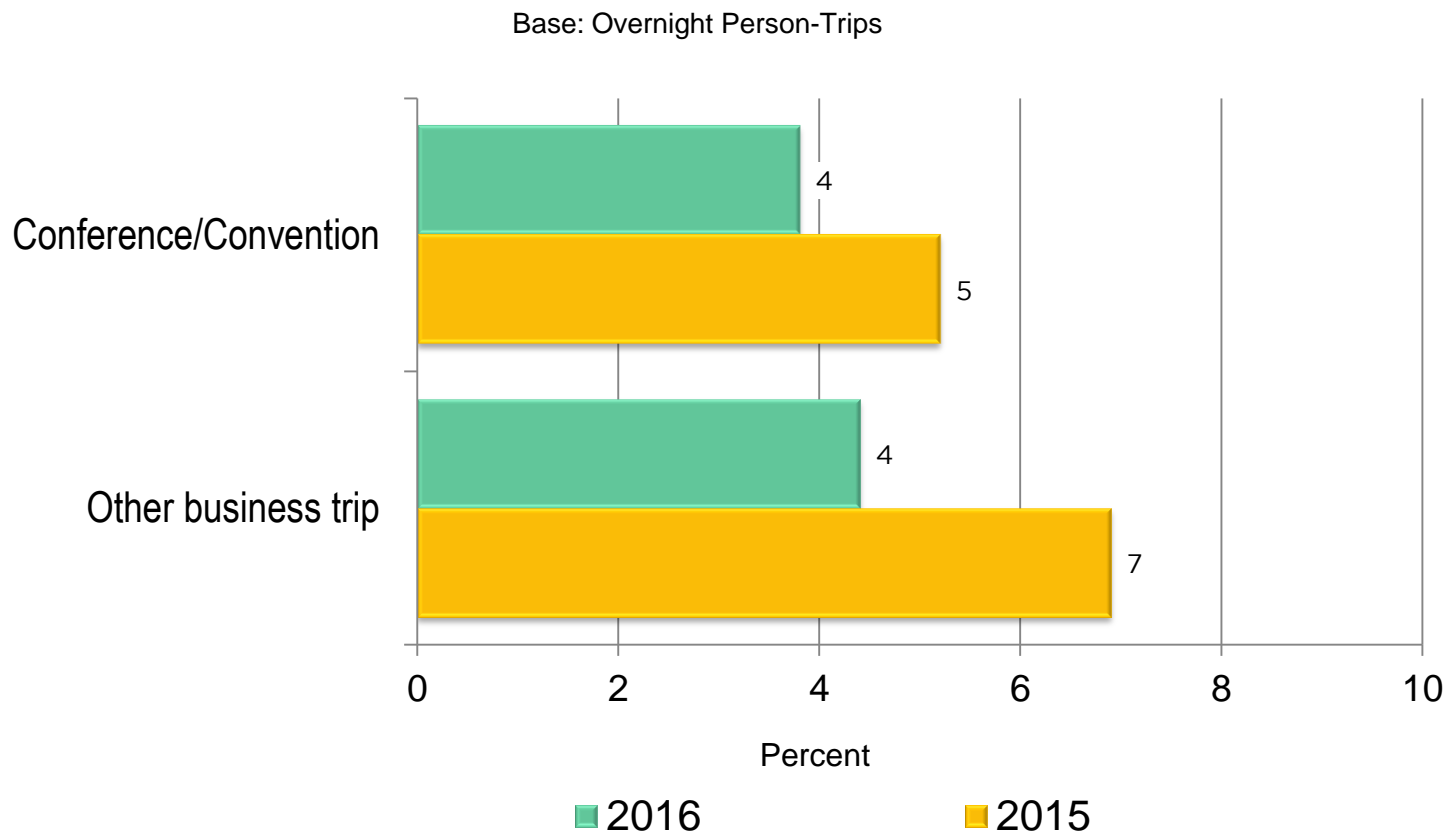
Main Purpose of Overnight Leisure Trip — 2016 vs. 2015



Main Purpose of Business Trip

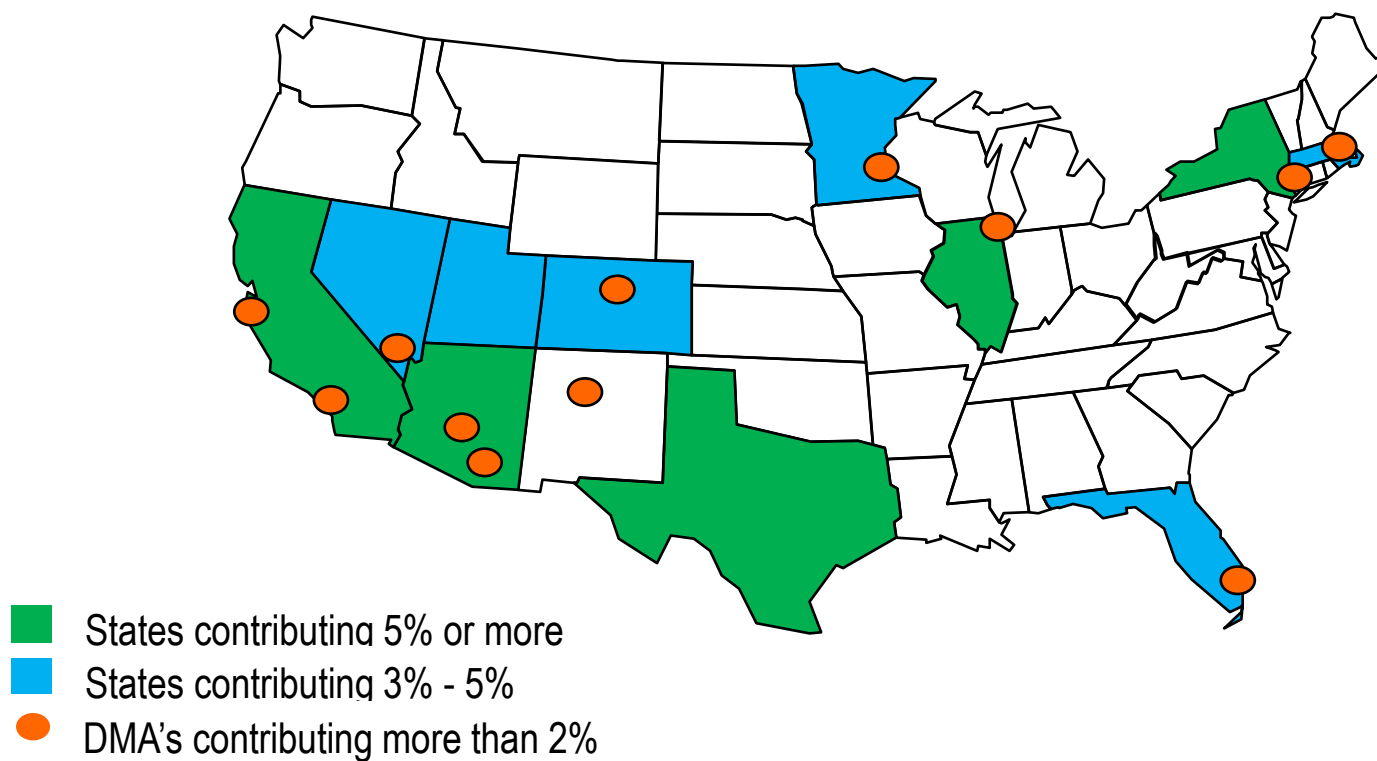


Main Purpose of Overnight Business Trip — 2016 vs. 2015

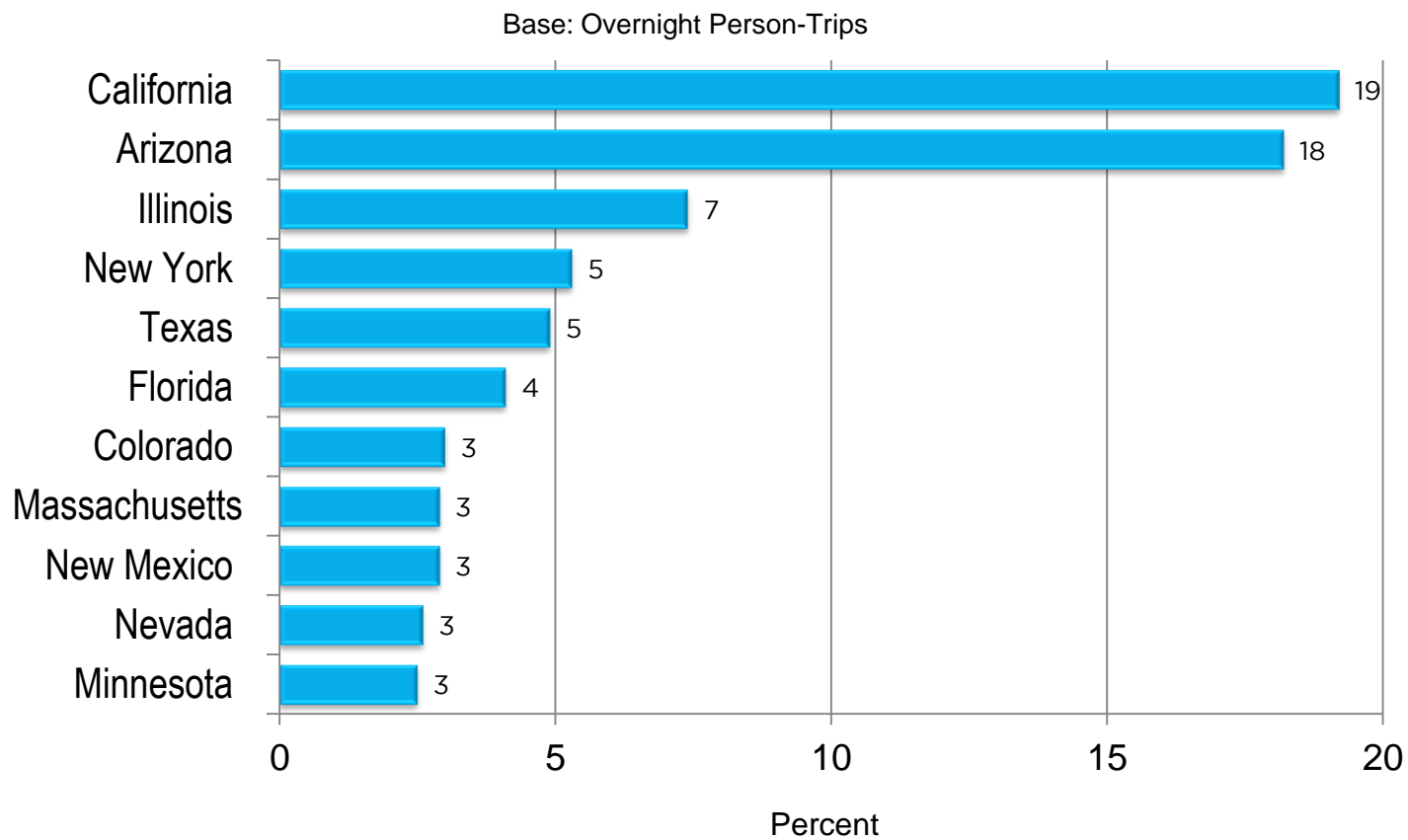


Sources of Business

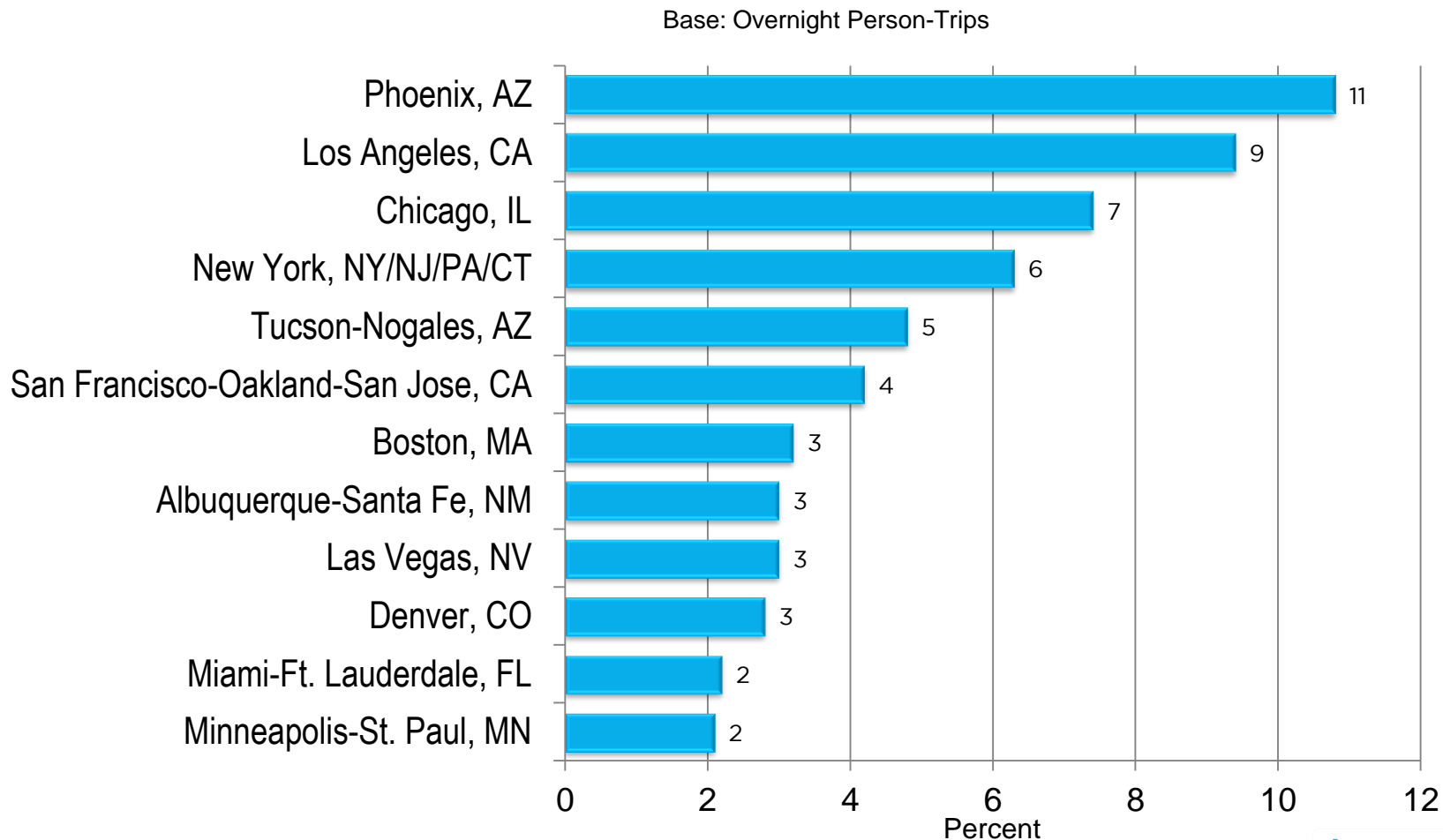
Base: Overnight Person-Trips



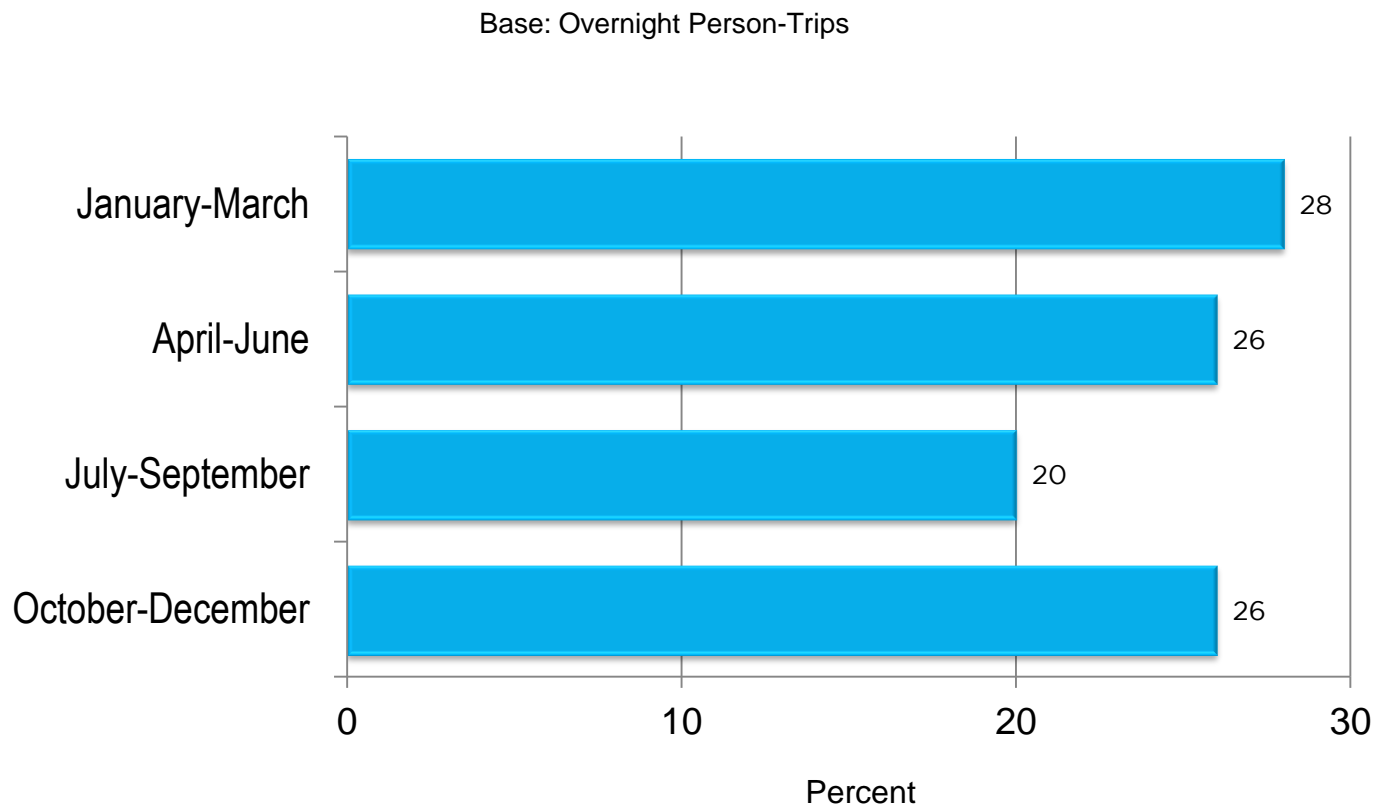
State Origin Of Trip



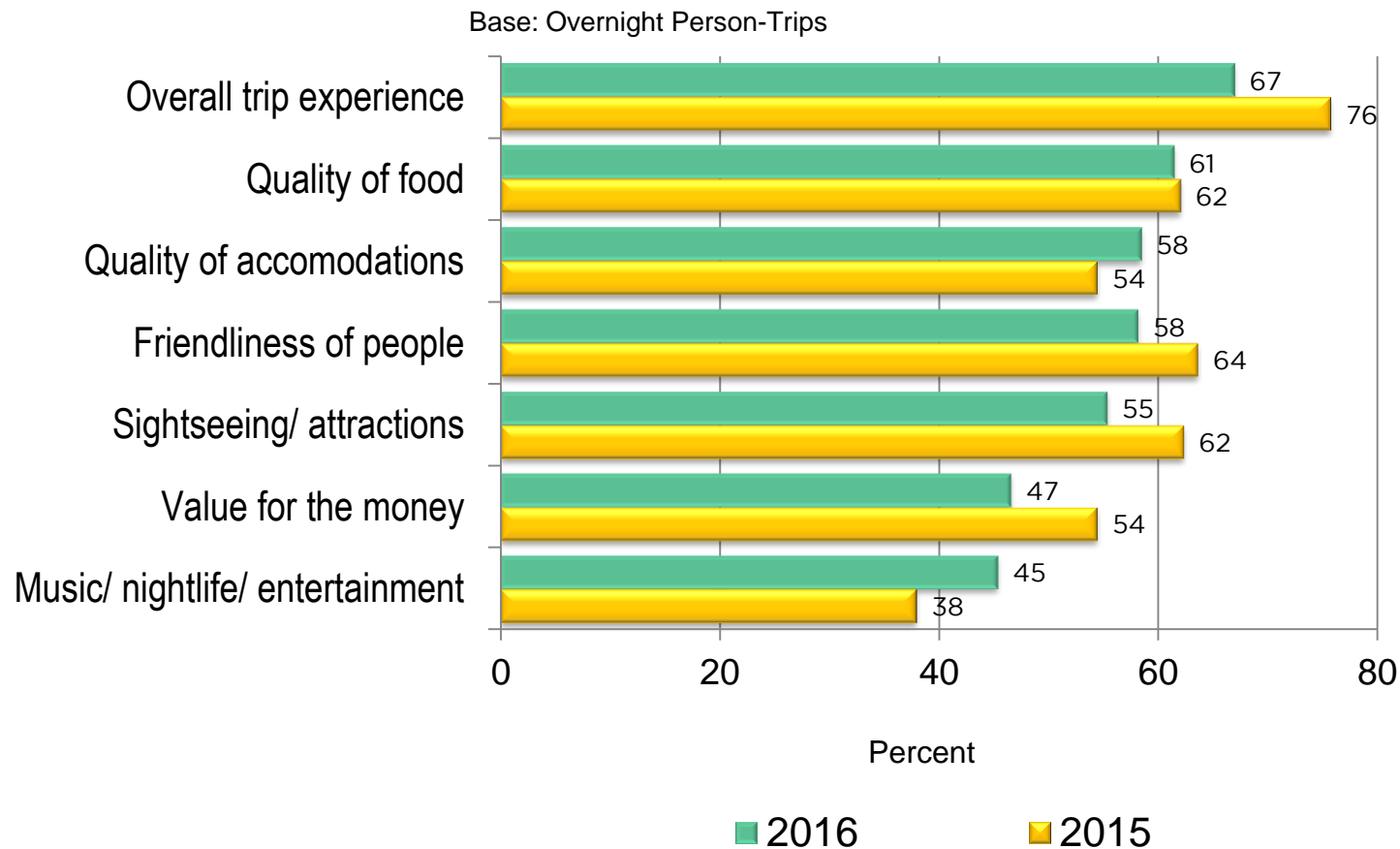
DMA Origin Of Trip



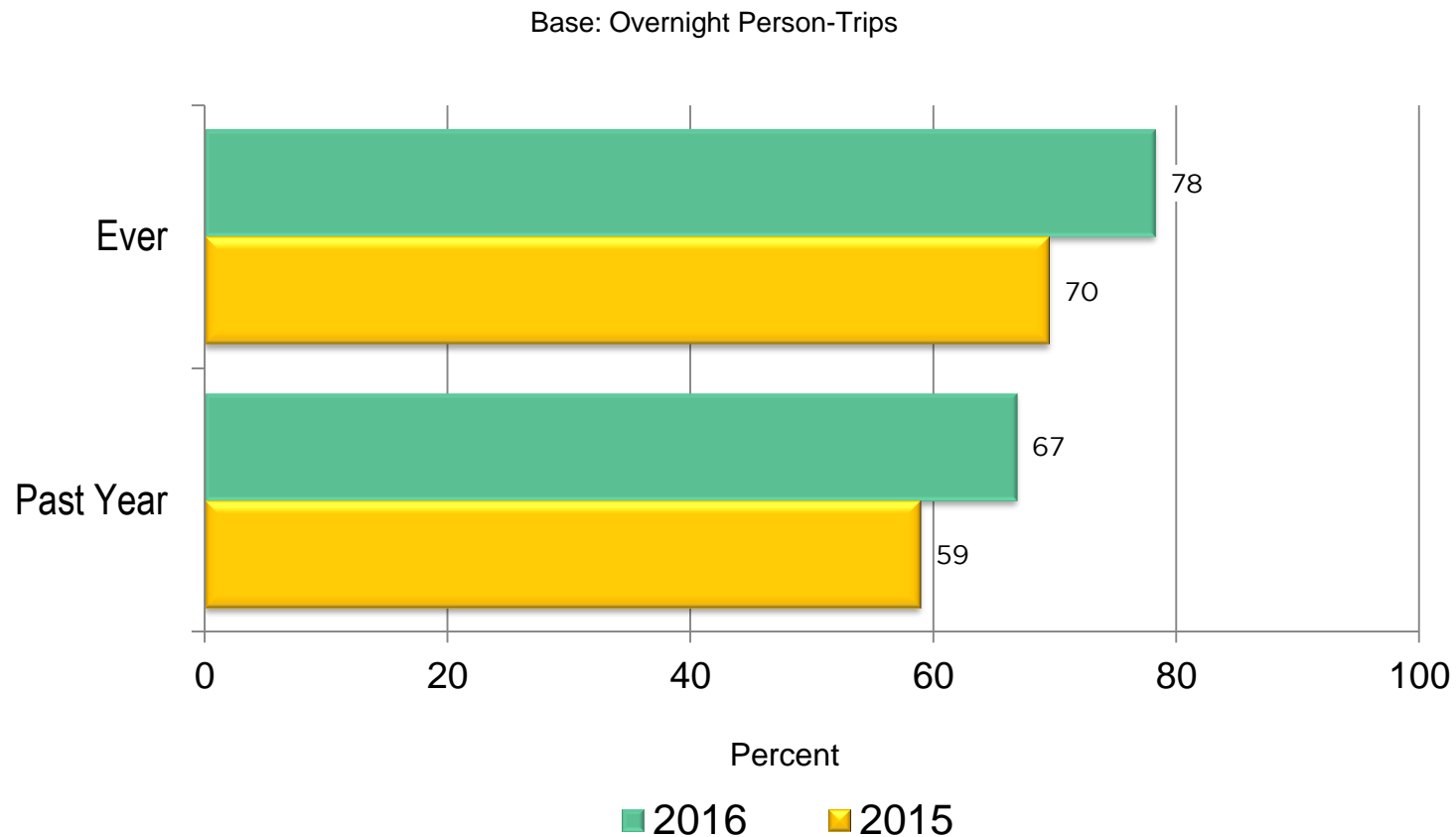
Season of Trip



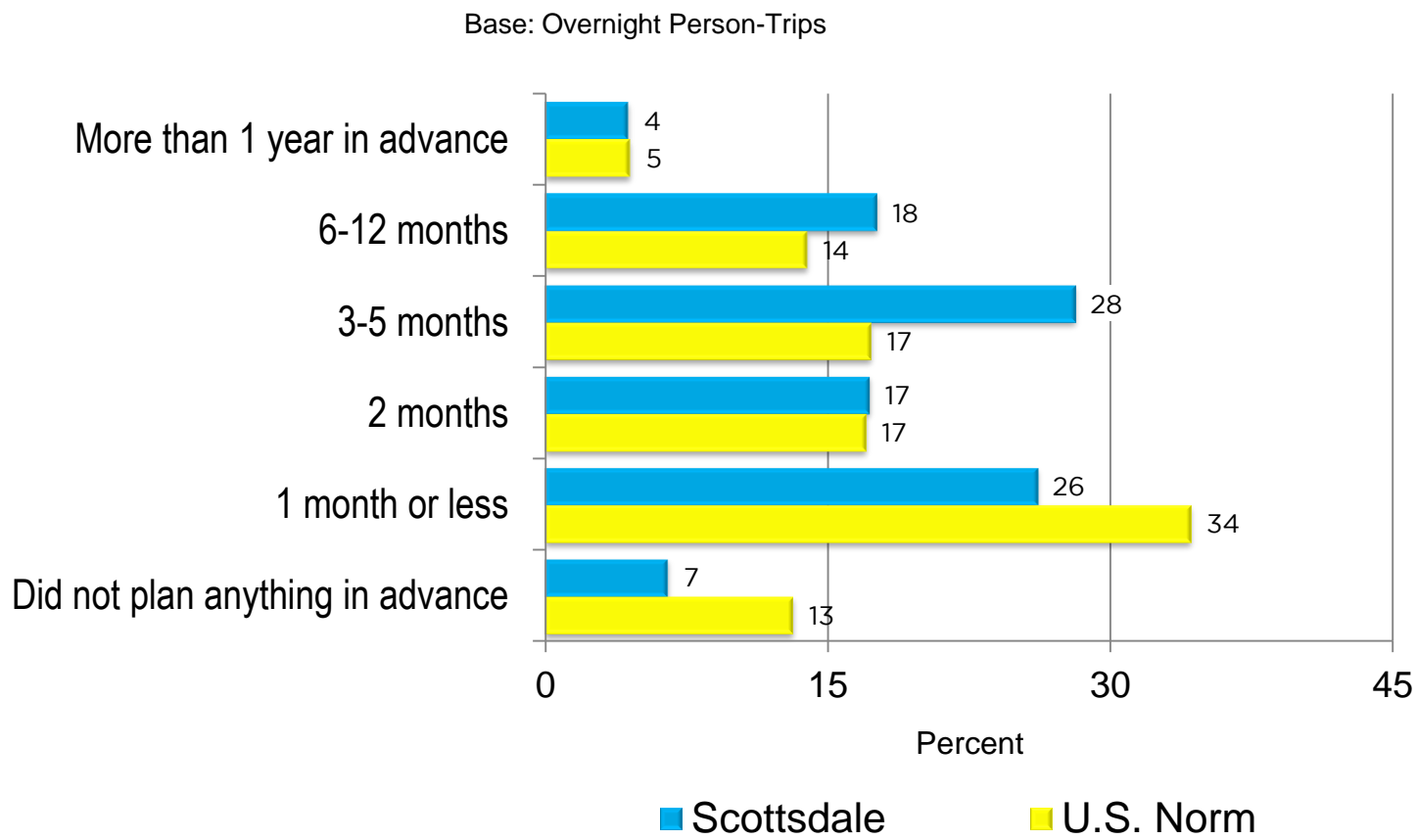
% Very Satisfied with Trip



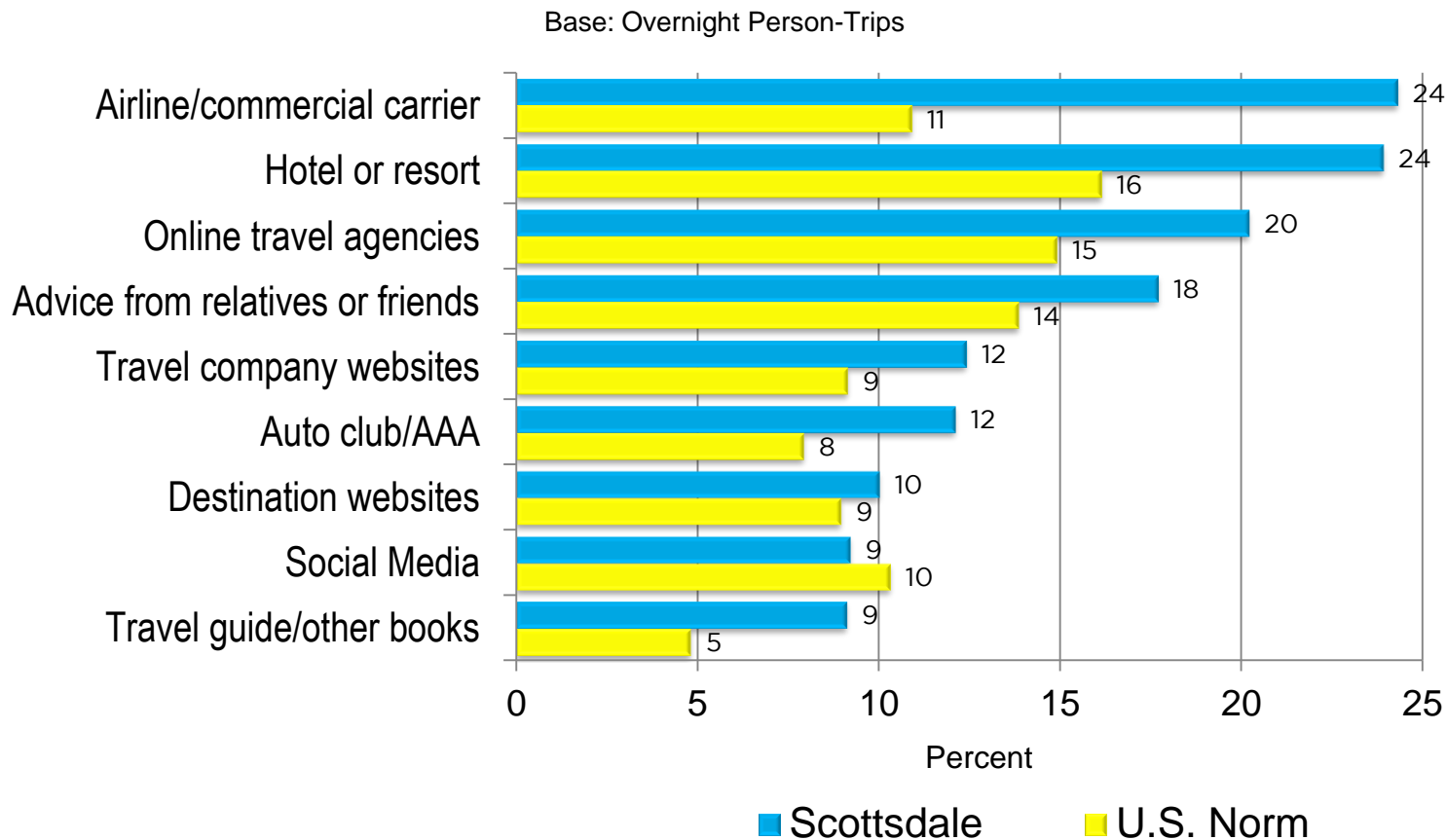
Past Visitation to Scottsdale



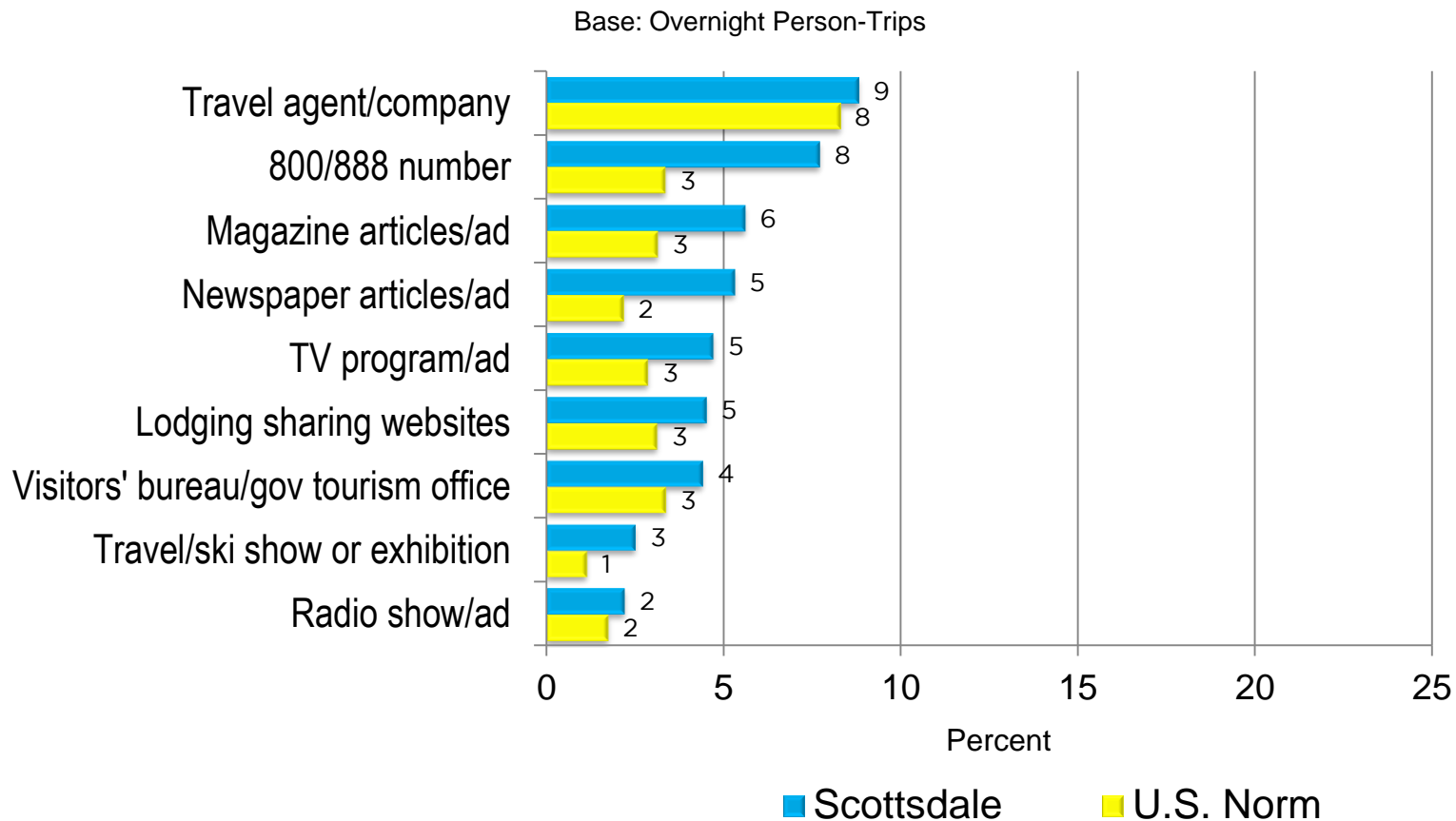
Length of Trip Planning



Trip Planning Information Sources

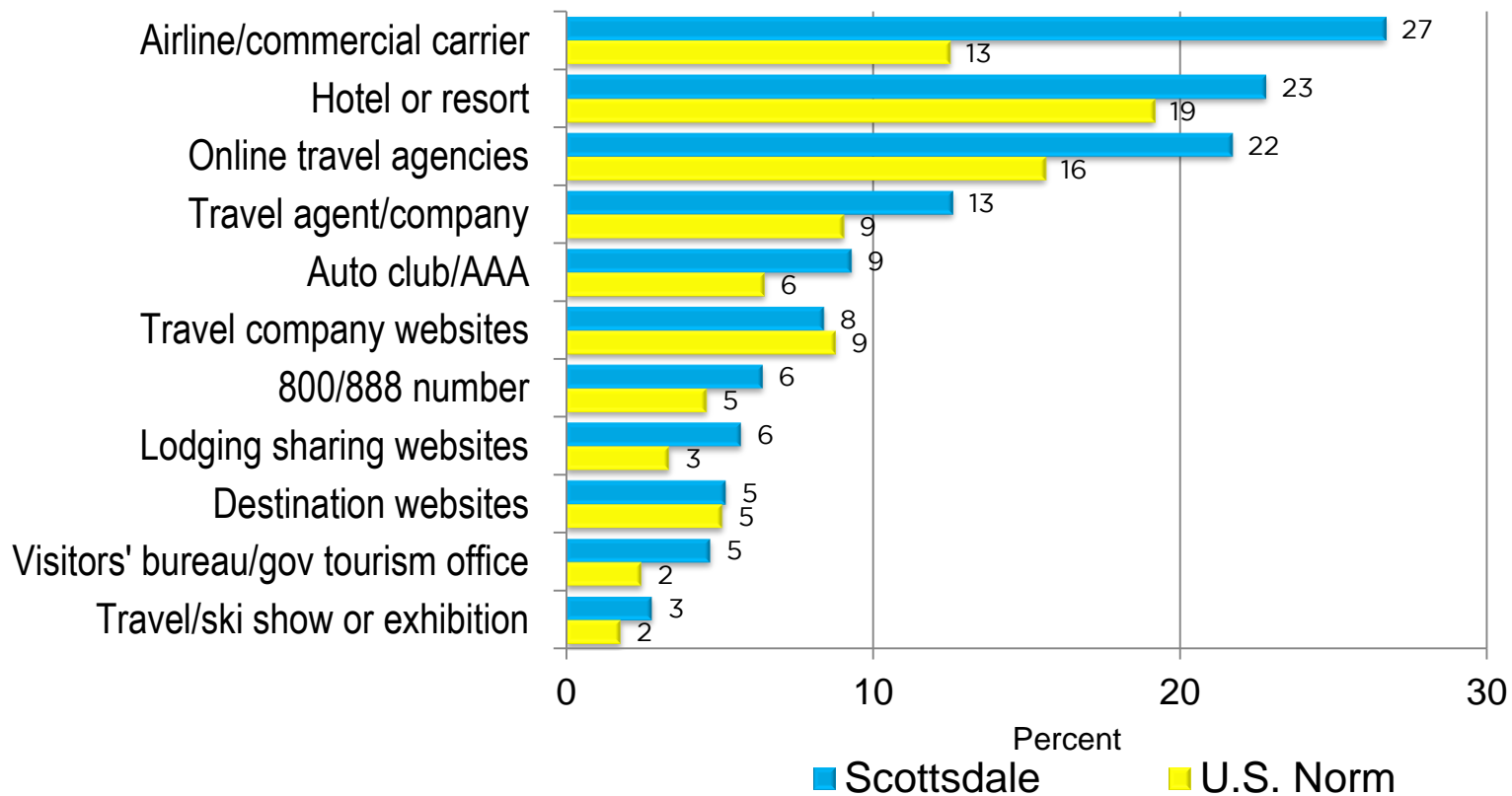


Trip Planning Information Sources (Cont'd)

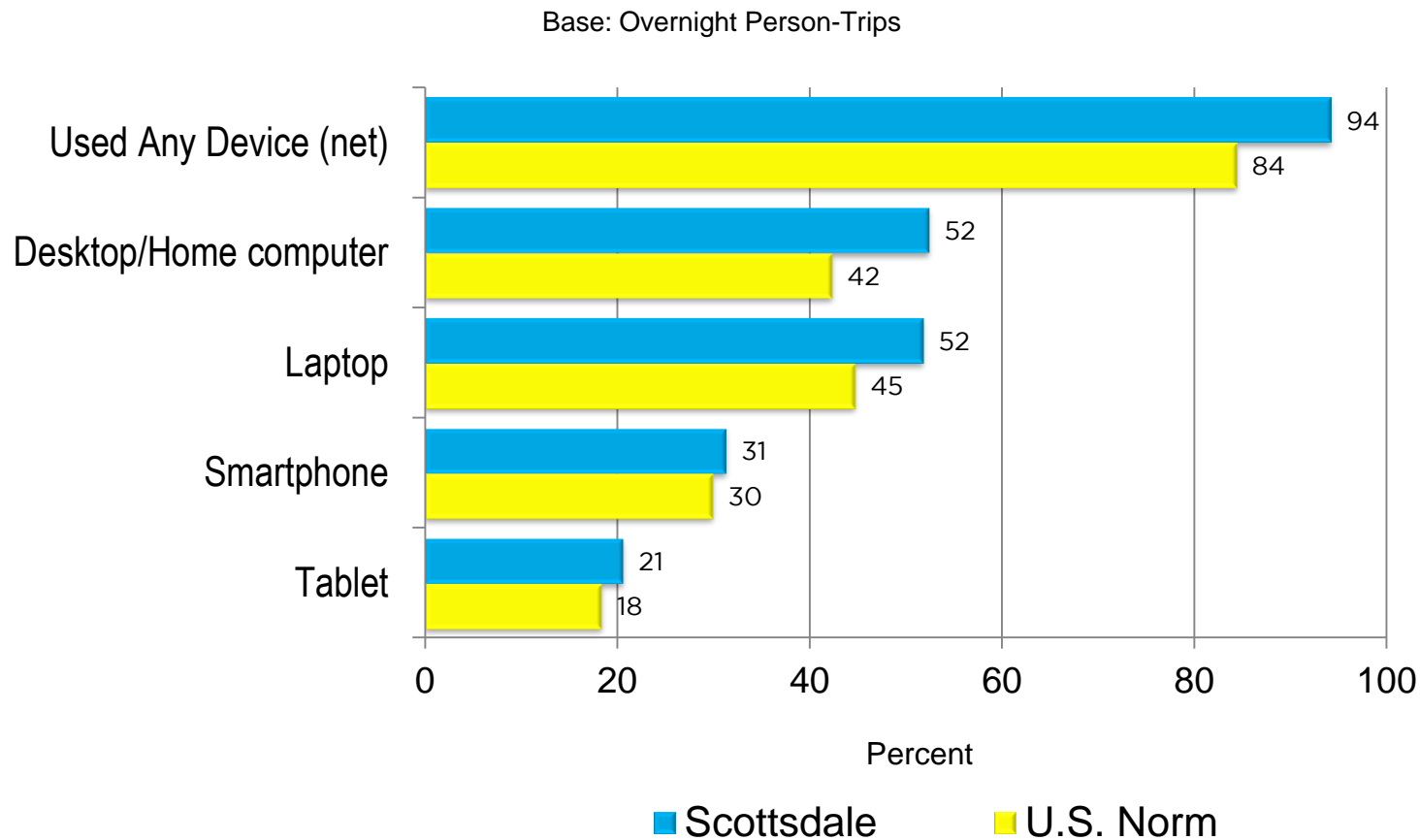


Method of Booking

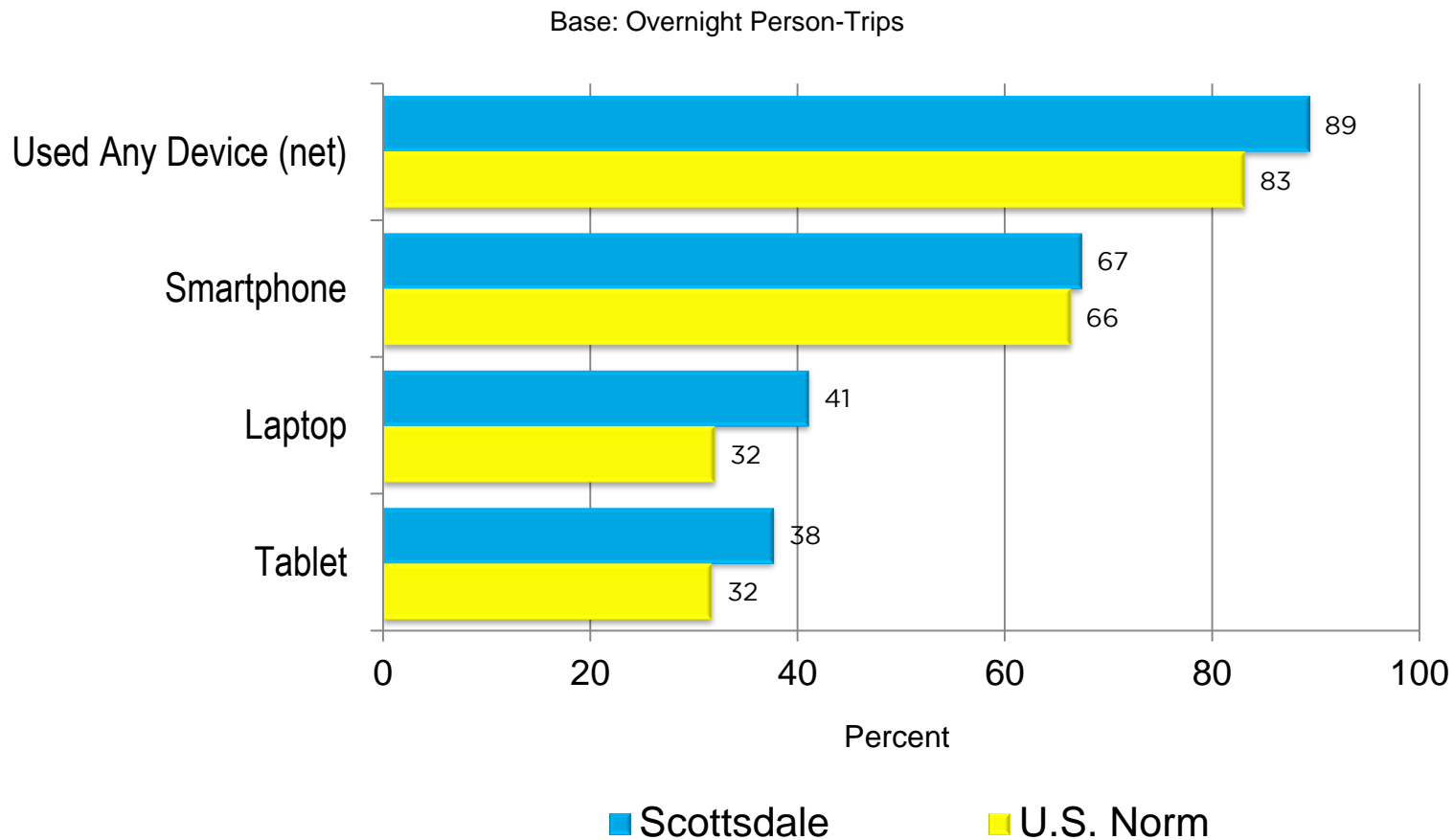
Base: Overnight Person-Trips



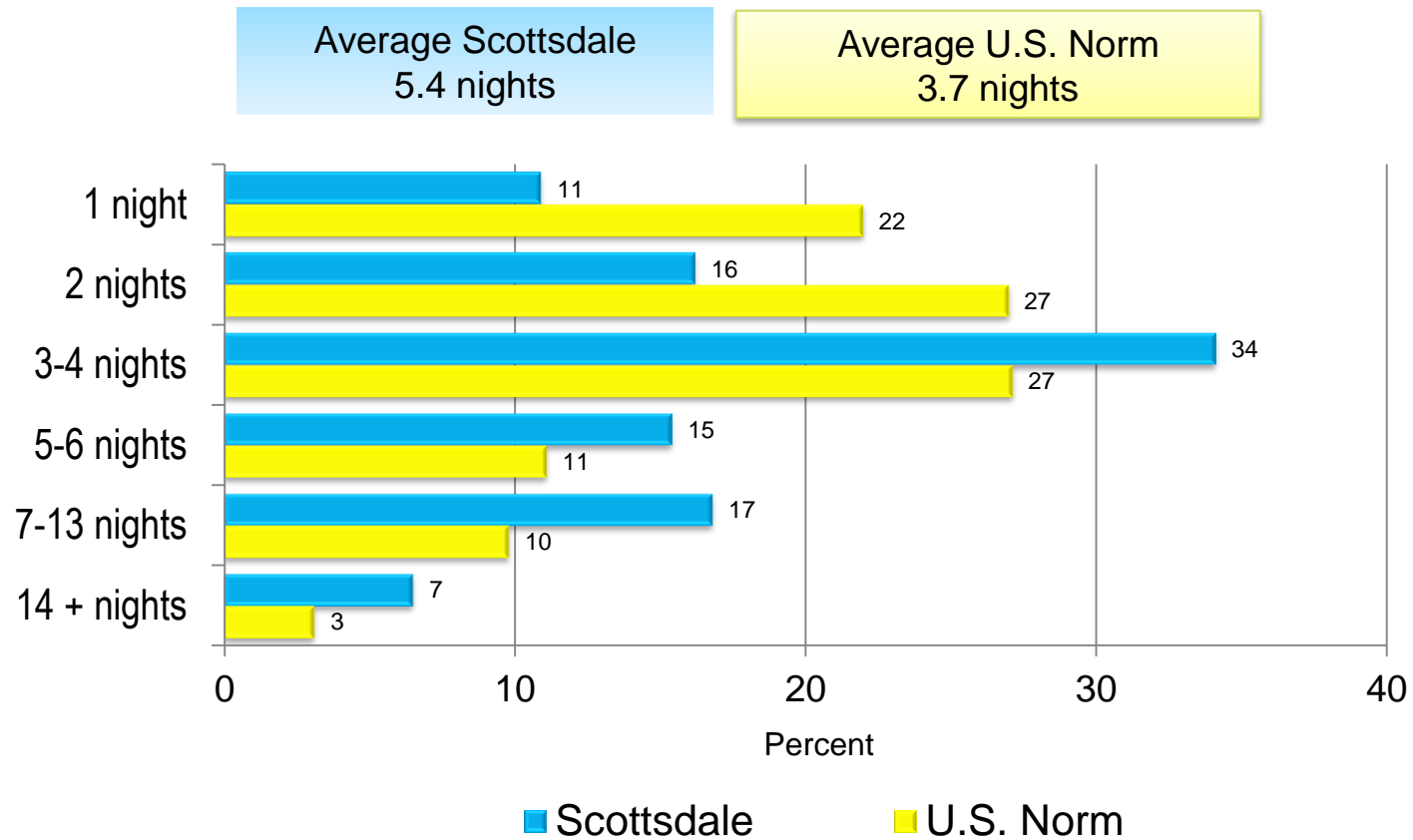
Devices Used for Trip Planning



Devices Used During Trip



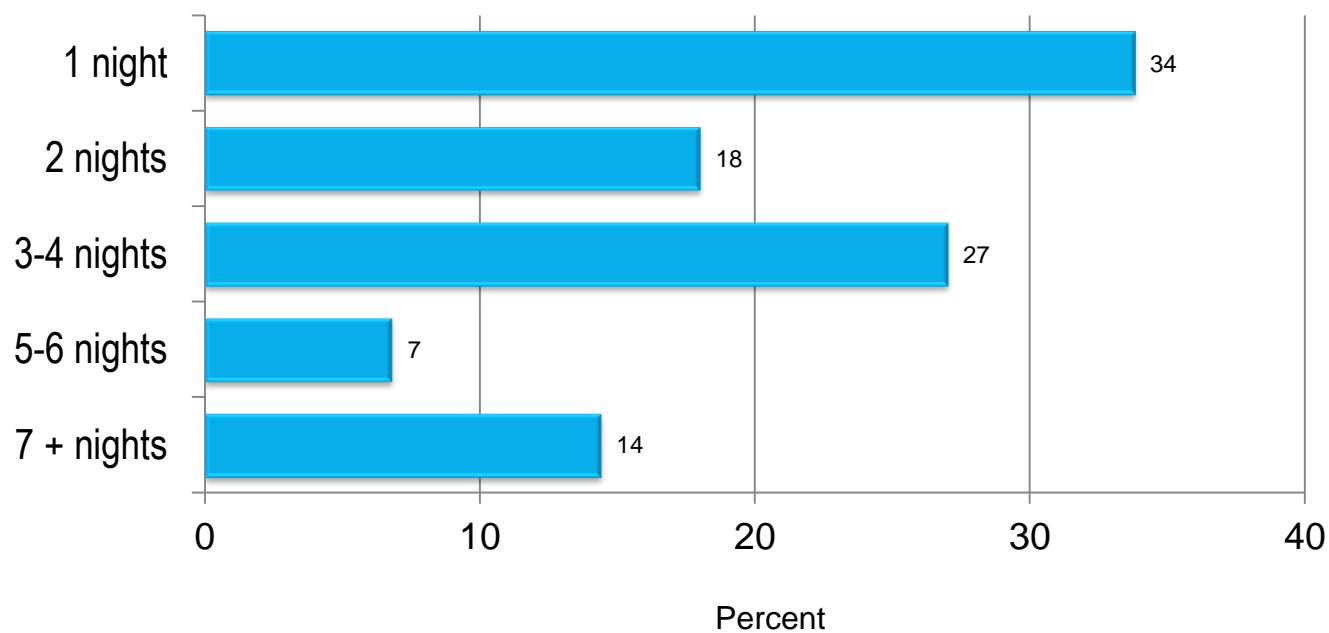
Total Nights Away on Trip



Number of Nights Spent in Scottsdale

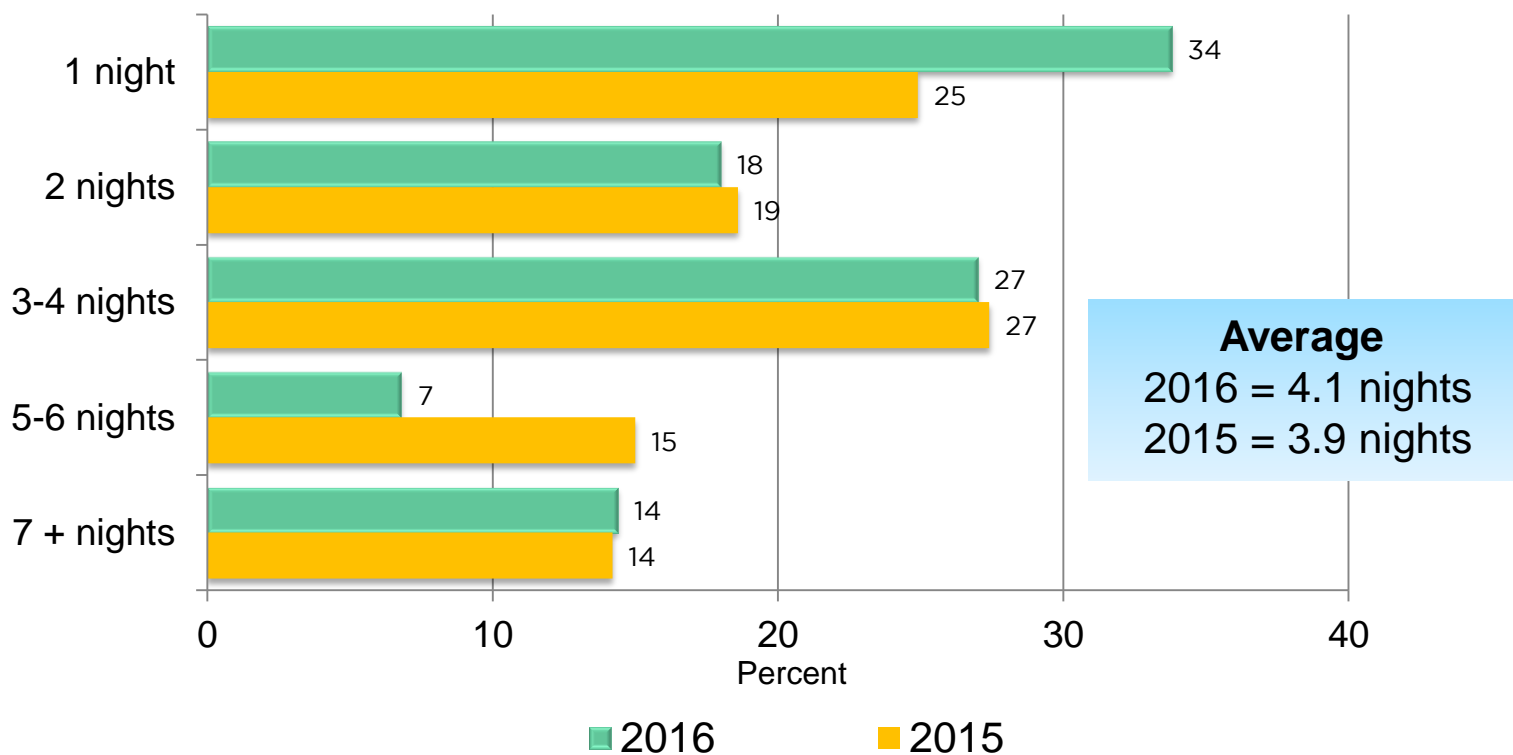
Base: Overnight Person-Trips with 1+ Nights Spent In Scottsdale

Average Nights Spent in Scottsdale = 4.1

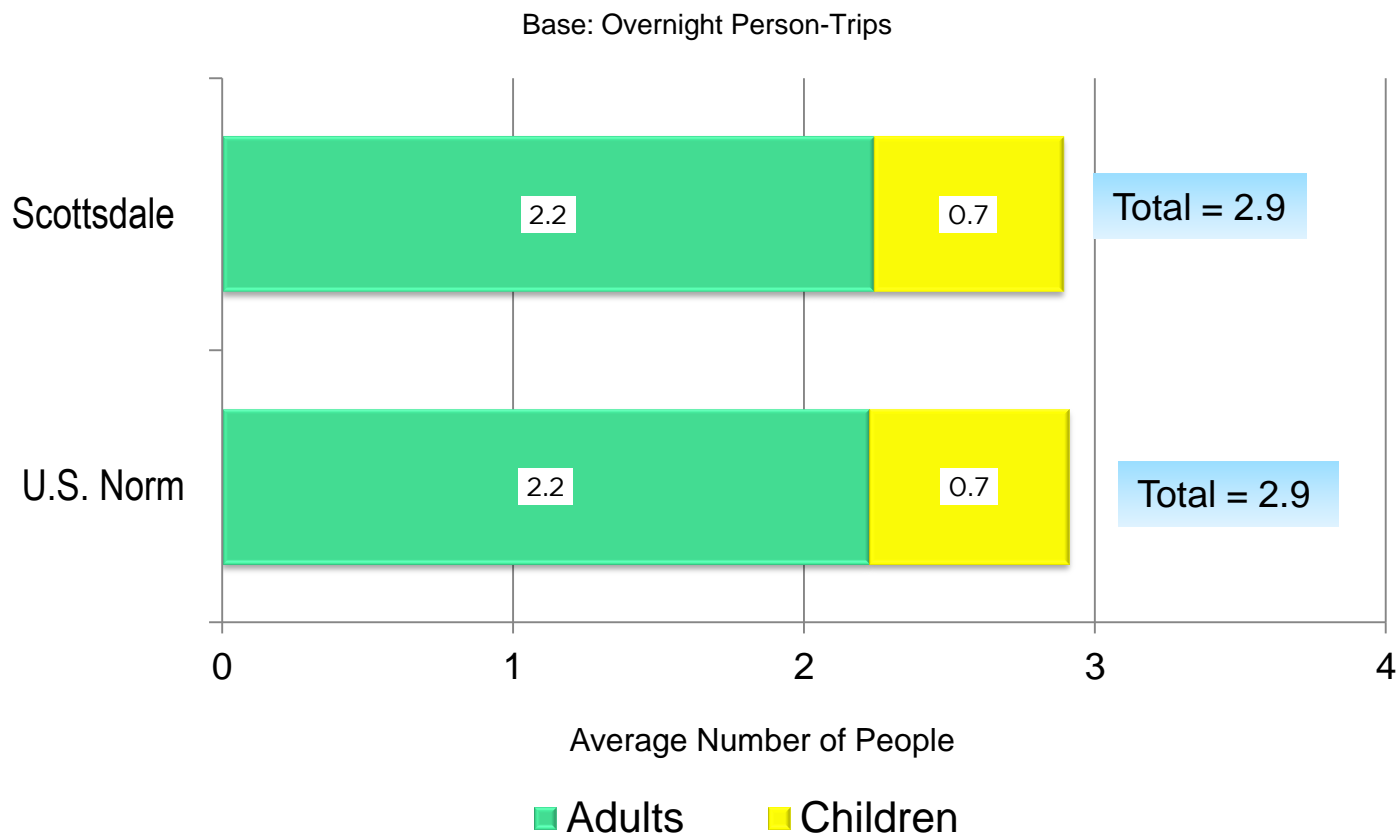


Number of Nights Spent in Scottsdale - 2016 vs. 2015

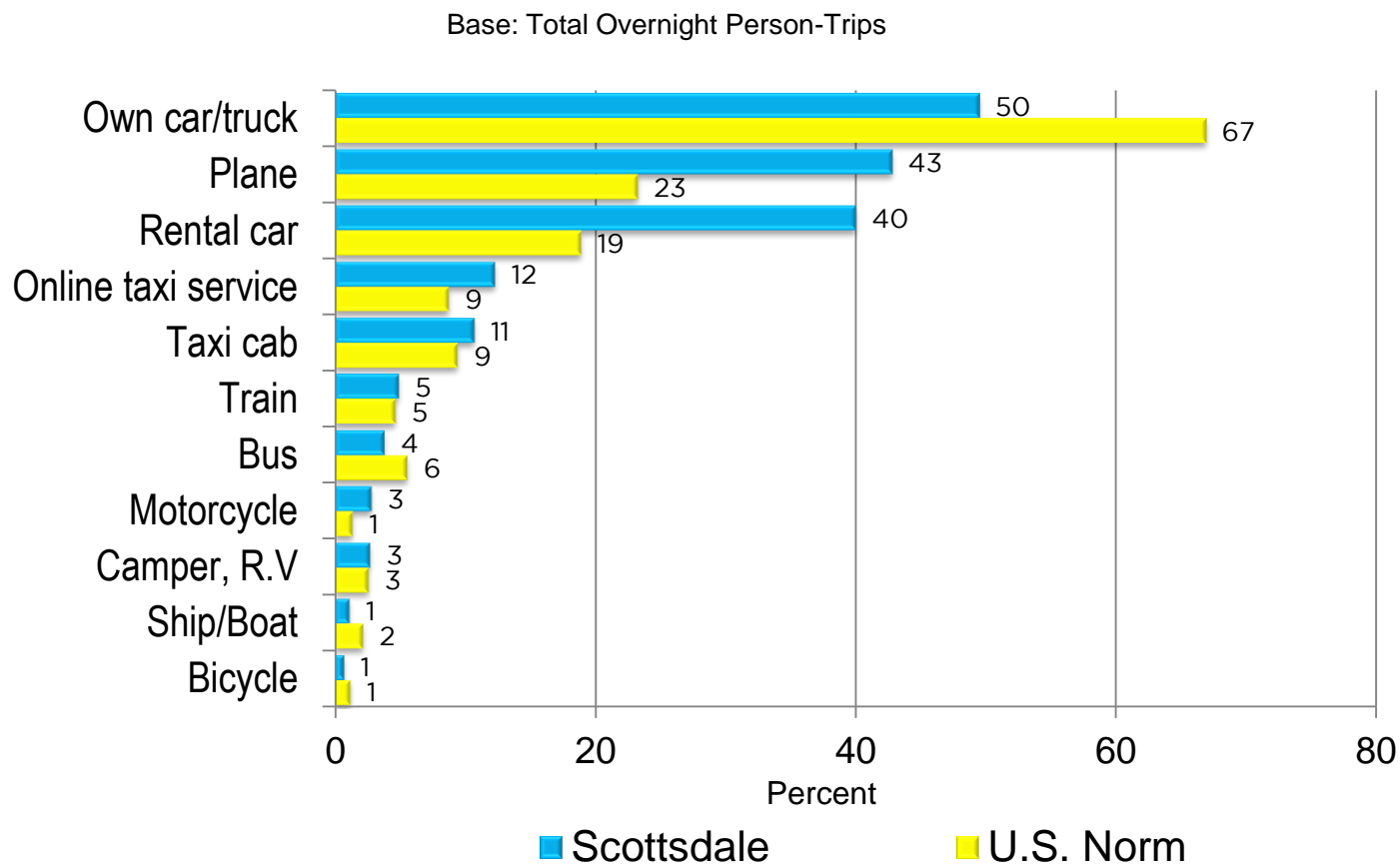
Base: Overnight Person-Trips with 1+ Nights Spent In Scottsdale



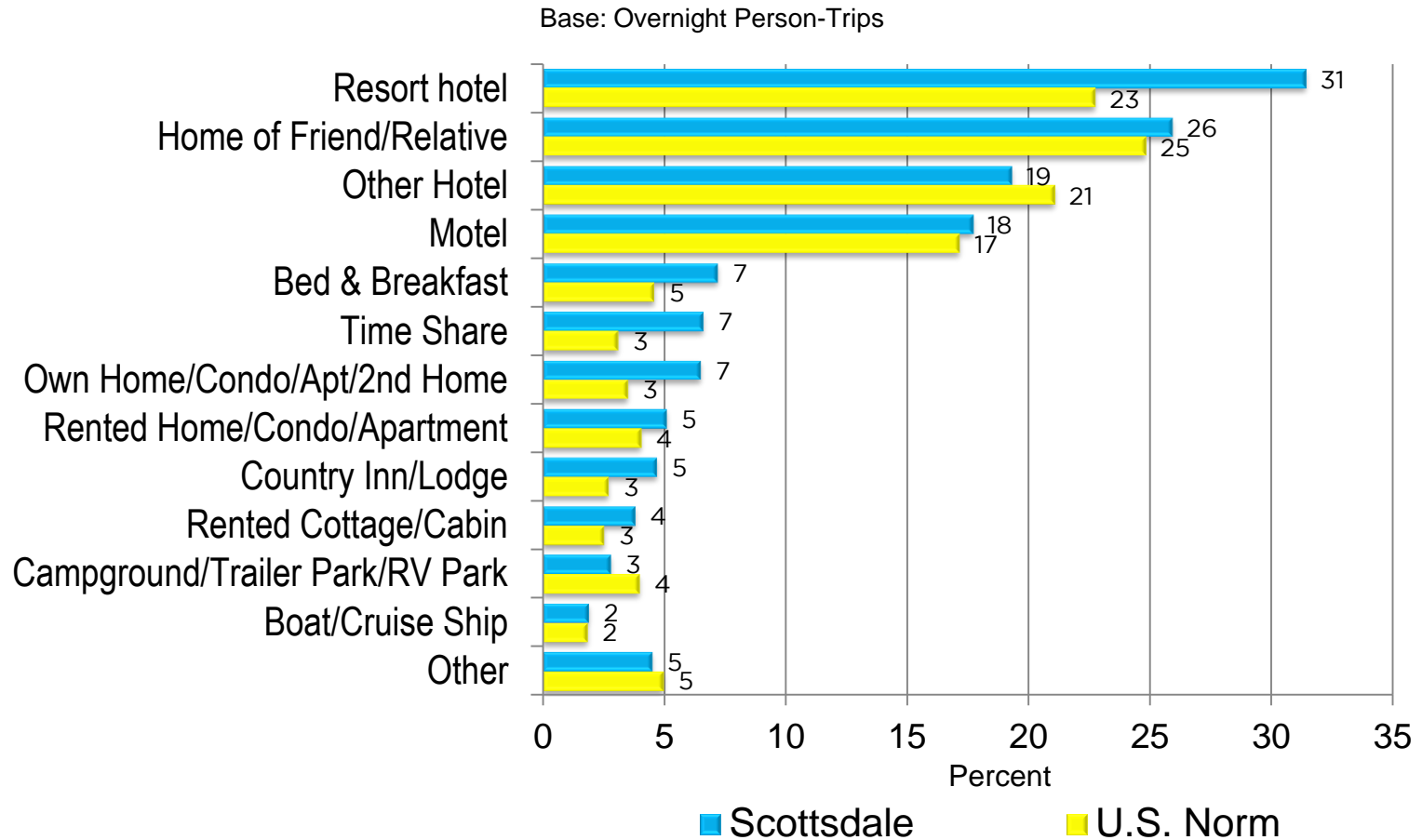
Size of Travel Party



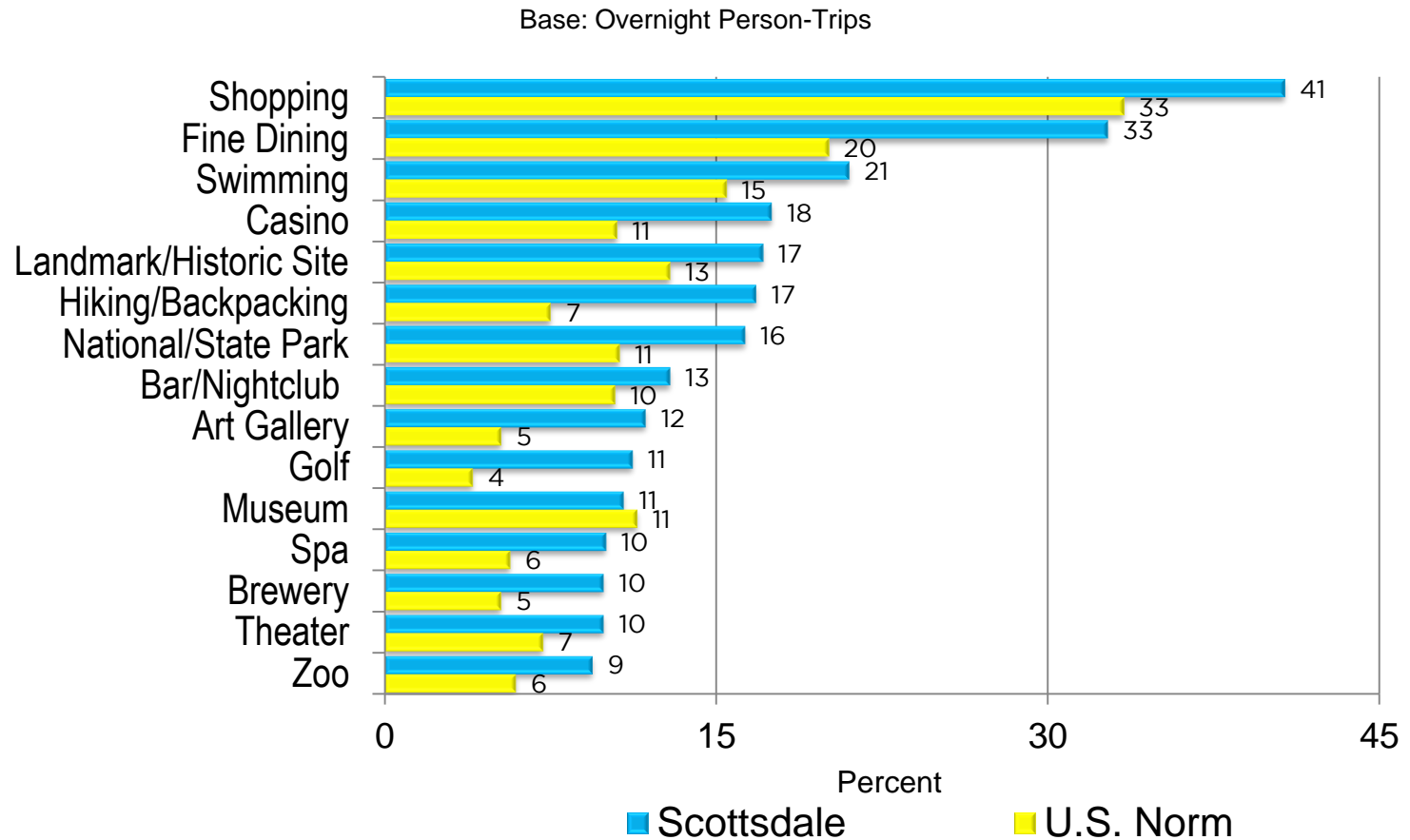
Transportation



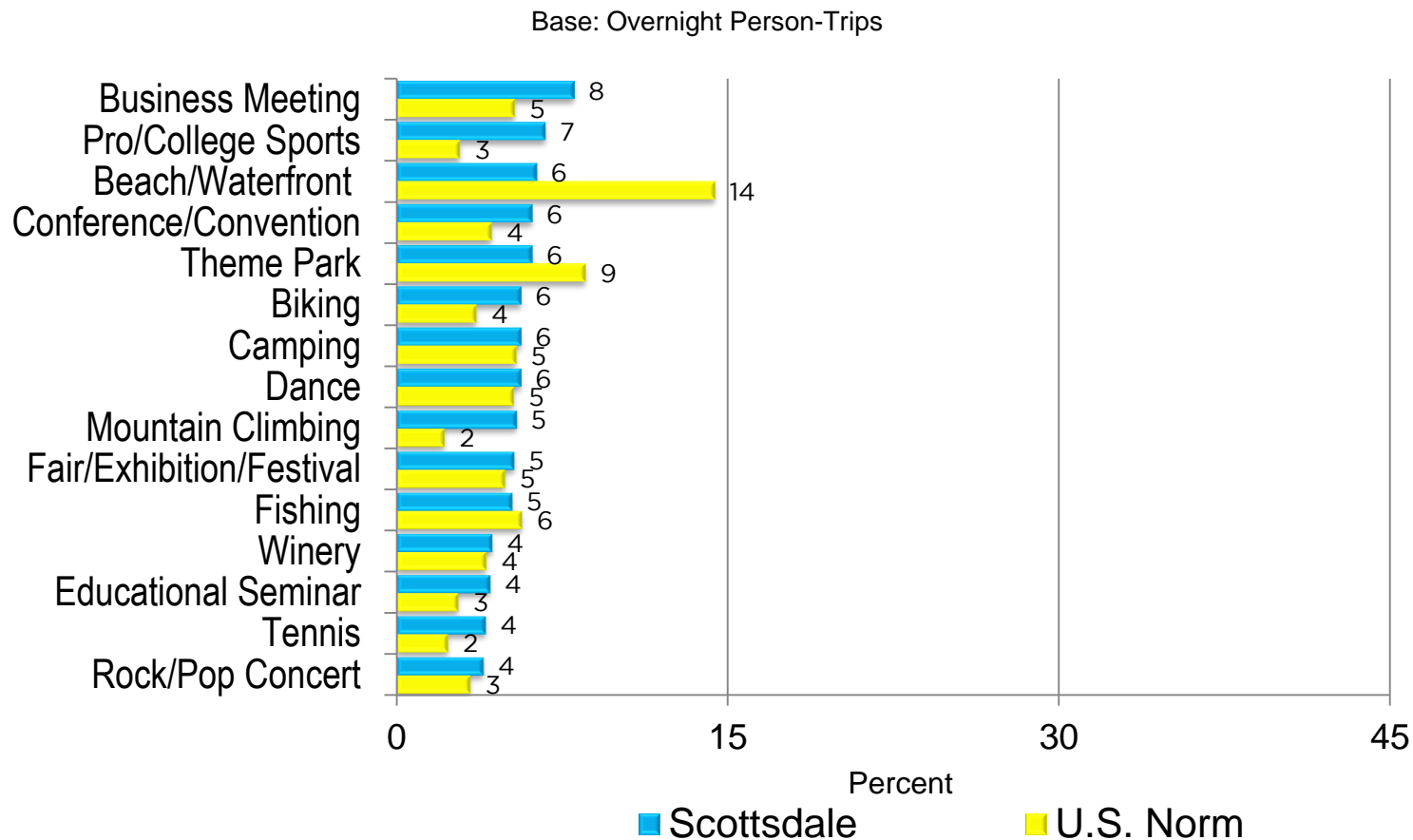
Accommodations



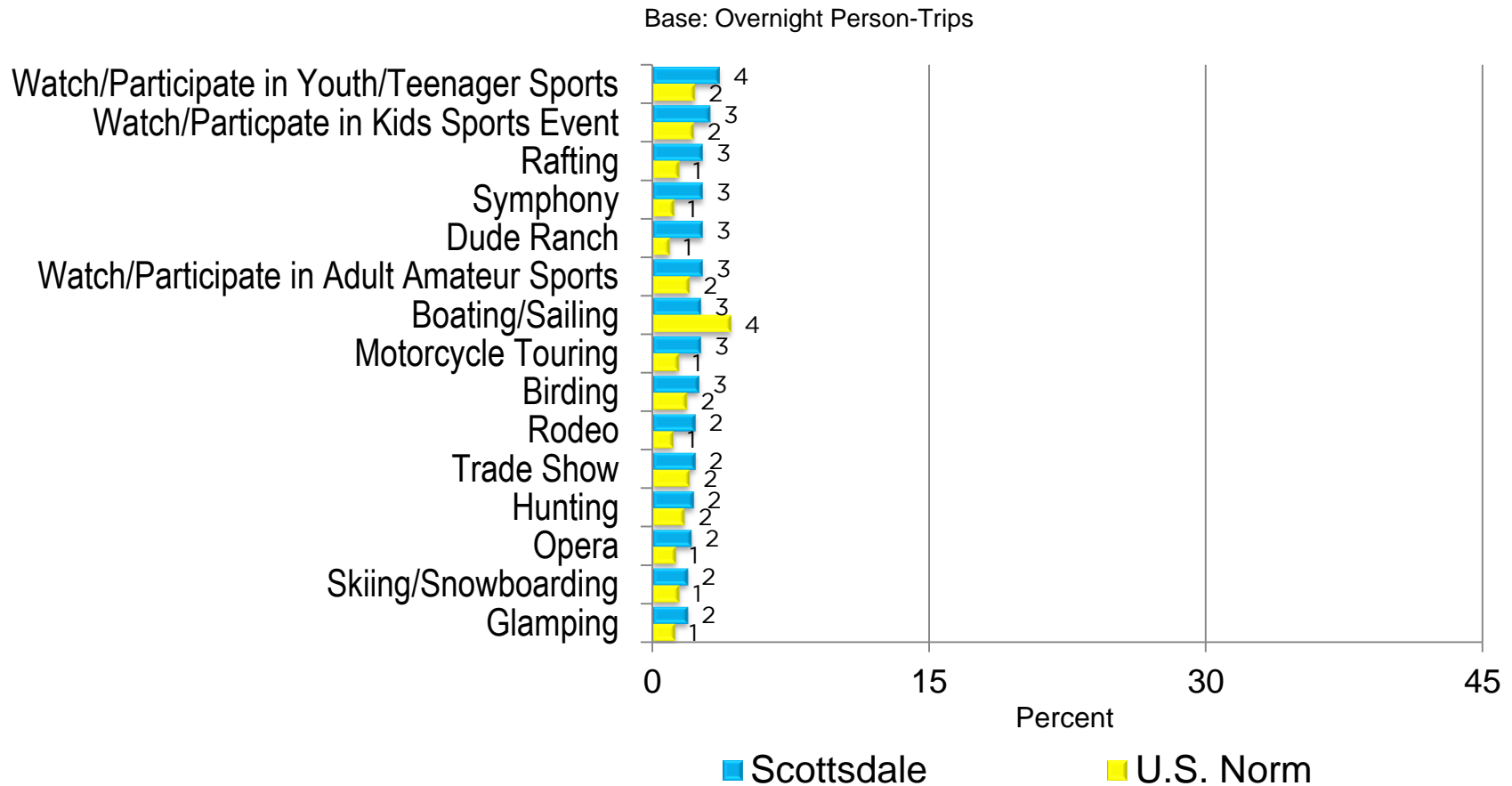
Activities and Experiences



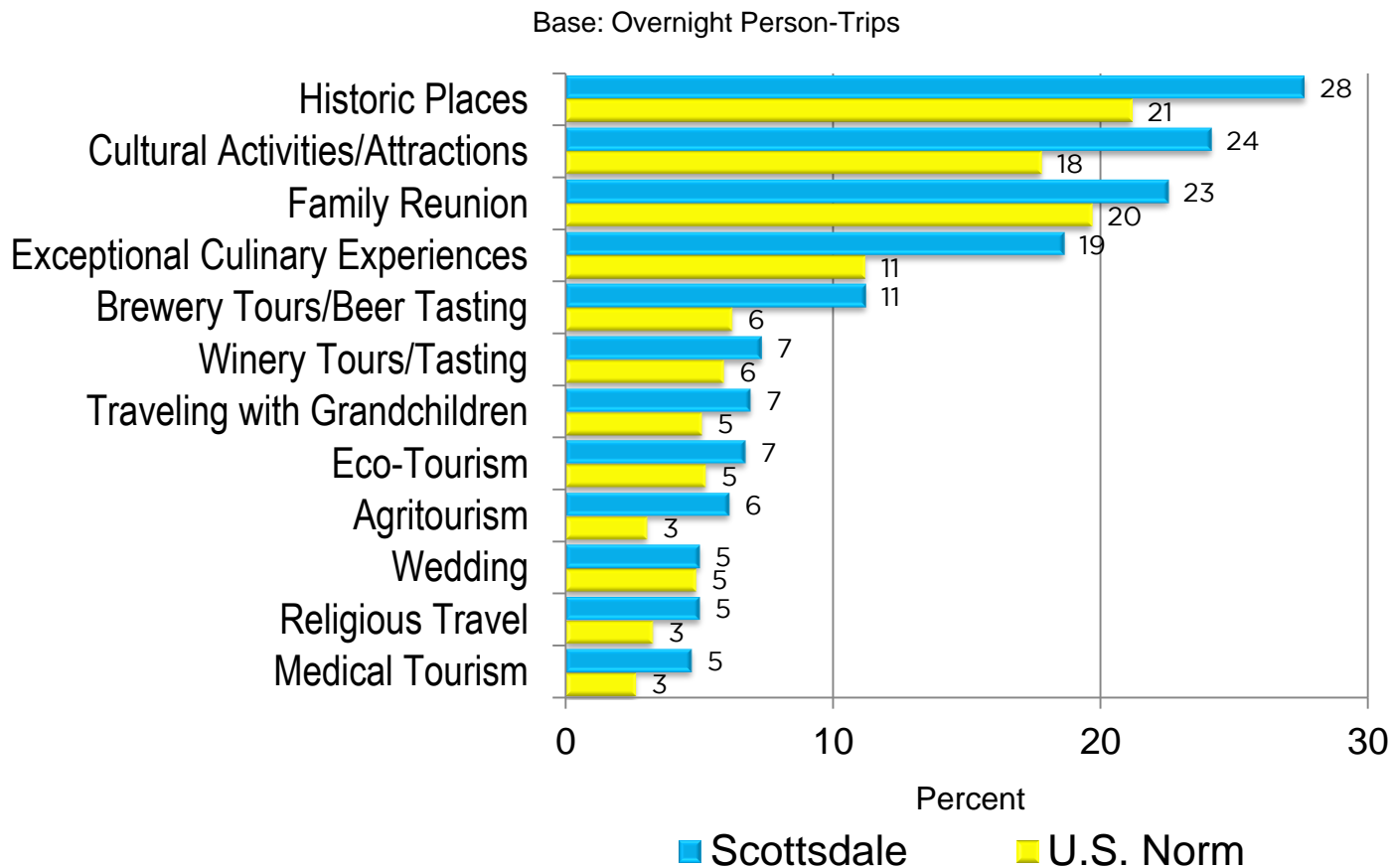
Activities and Experiences (Cont'd)



Activities and Experiences (Cont'd)

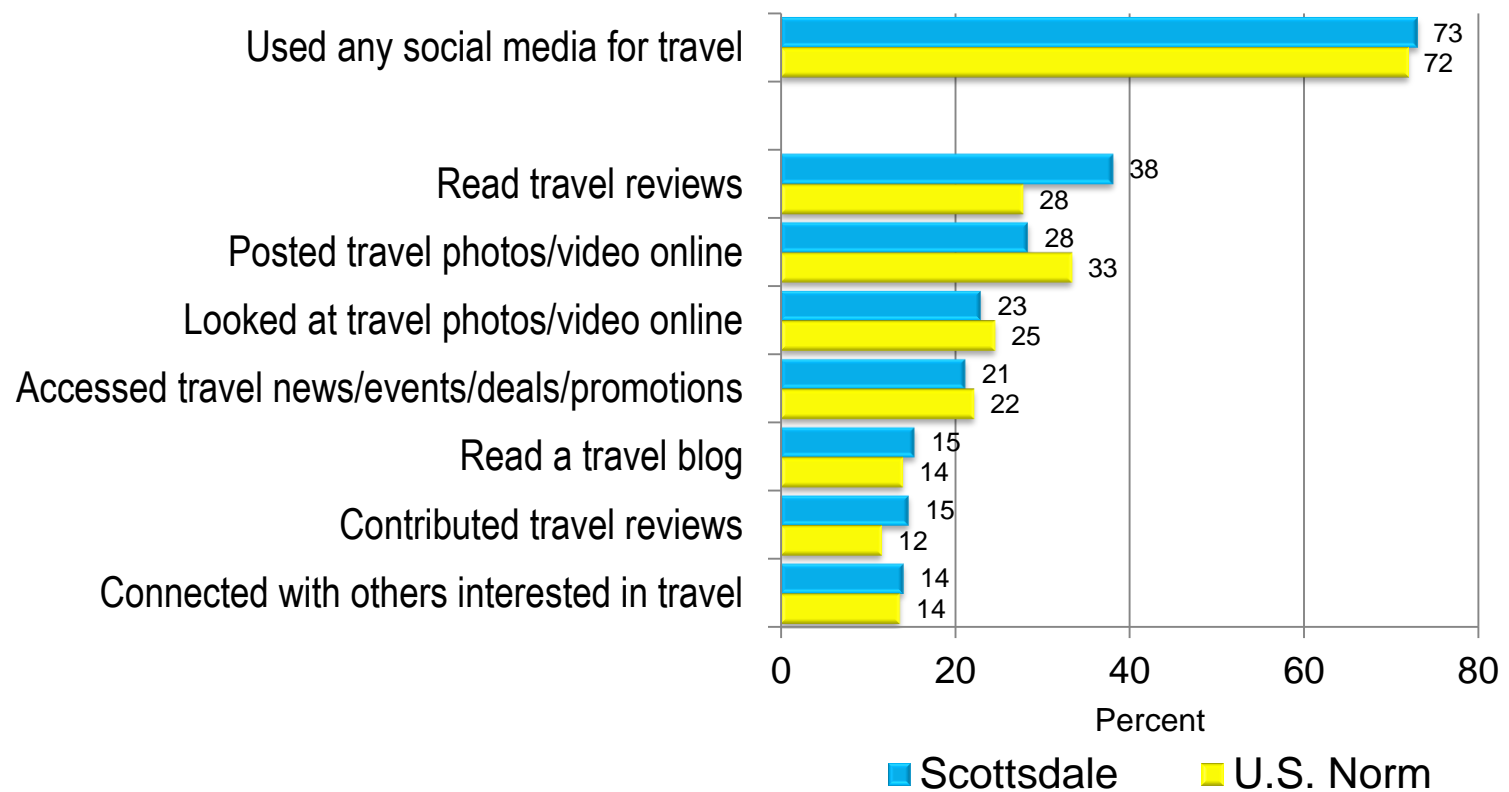


Activities of Special Interest



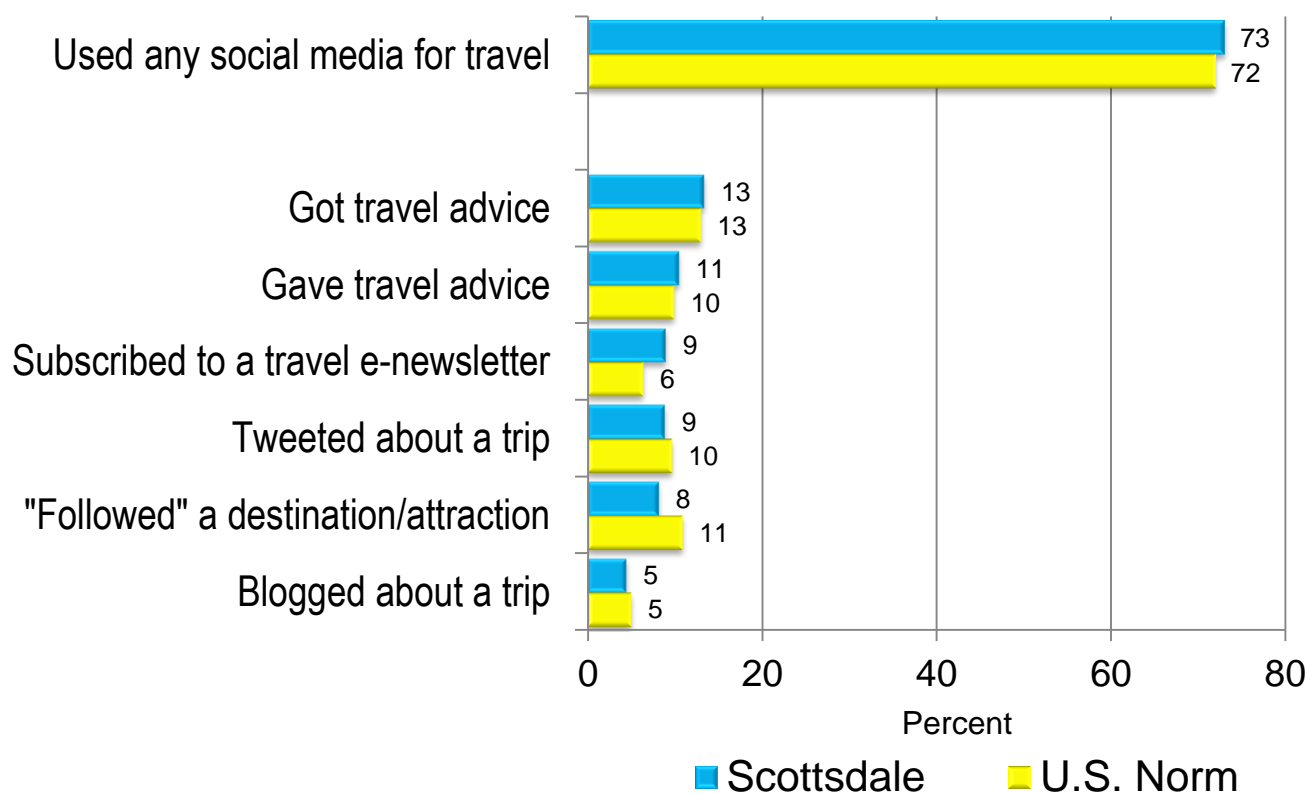
Online Social Media Use by Travelers

Base: Overnight Person-Trips



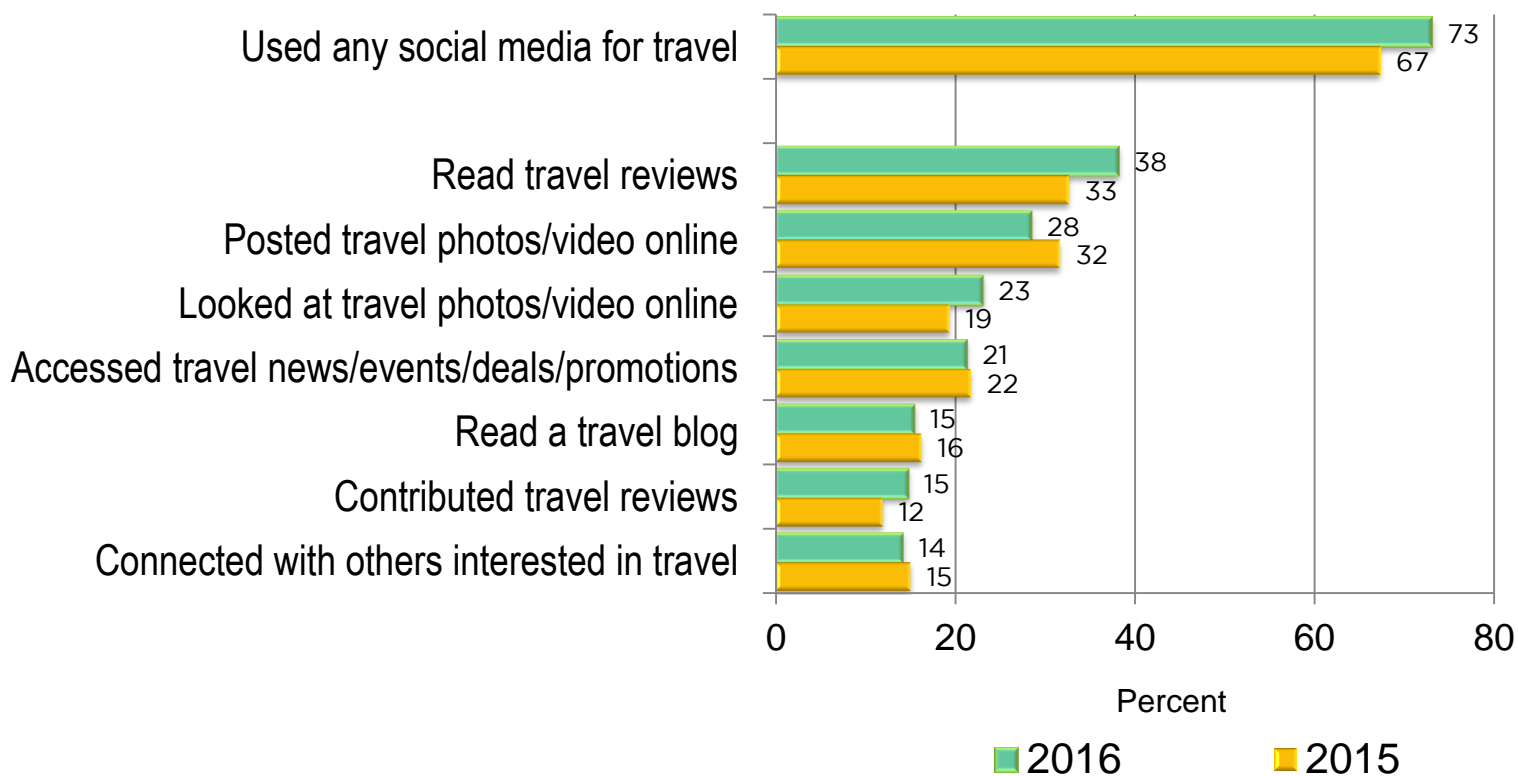
Online Social Media Use by Travelers (Cont'd)

Base: Overnight Person-Trips



Online Social Media Use by Travelers – 2016 vs. 2015

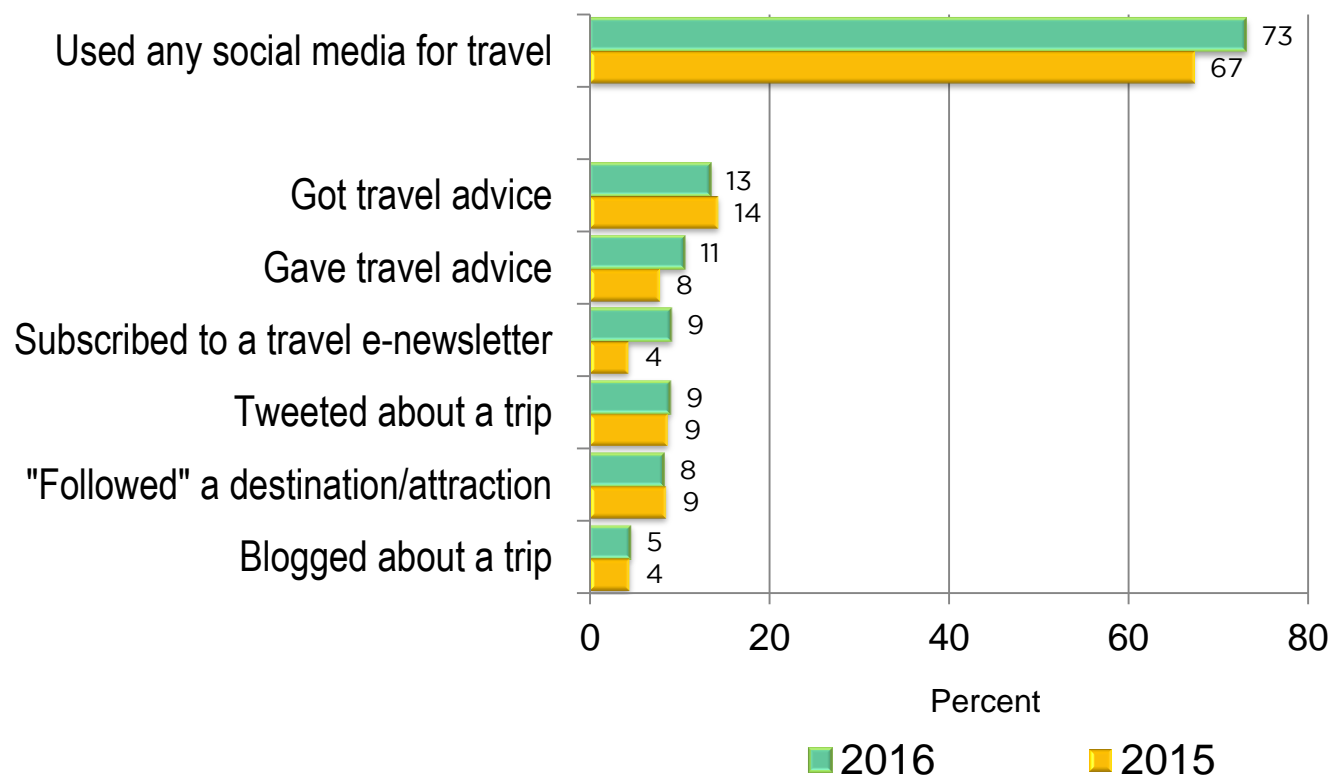
Base: Overnight Person-Trips



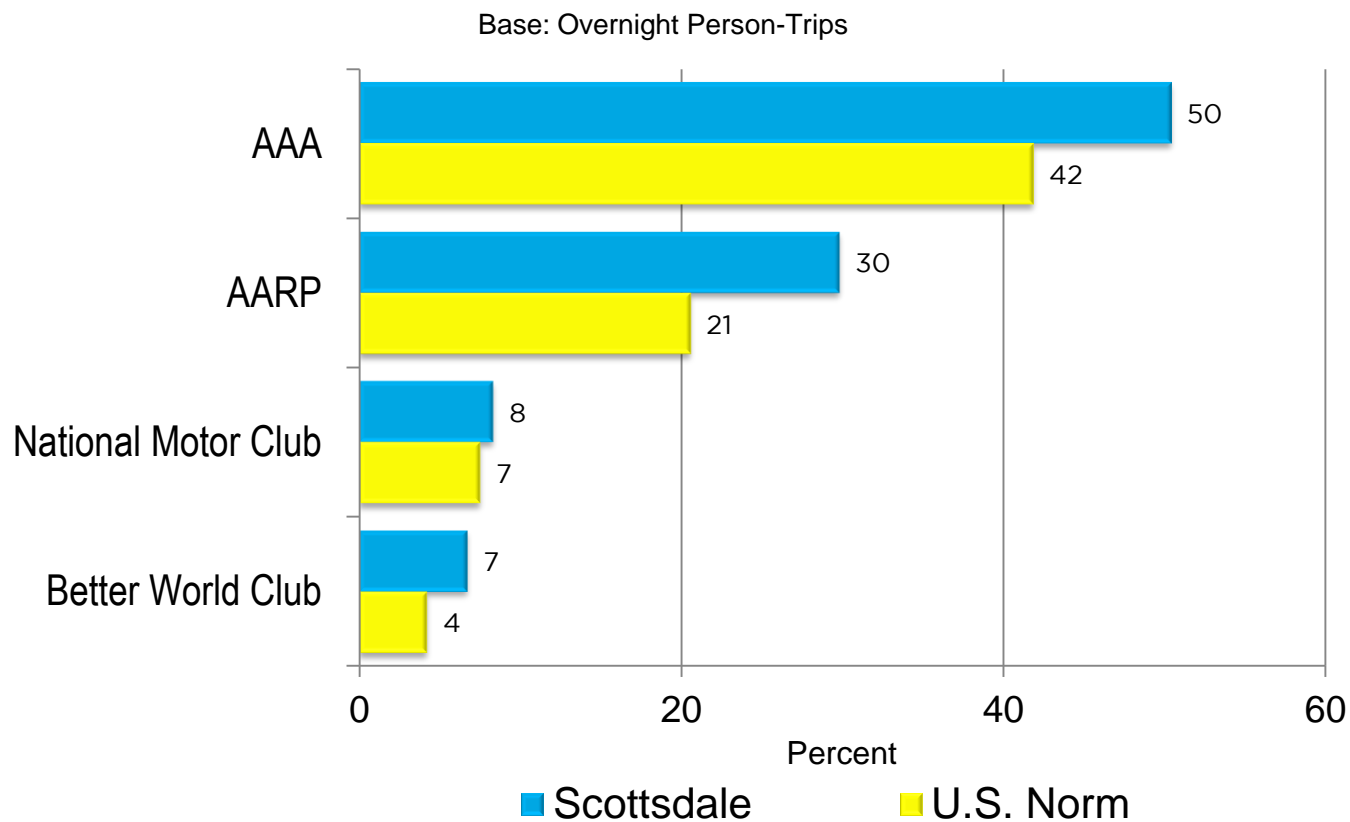
Online Social Media Use by Travelers

– 2016 vs. 2015 (Cont'd)

Base: Overnight Person-Trips



Organization Membership

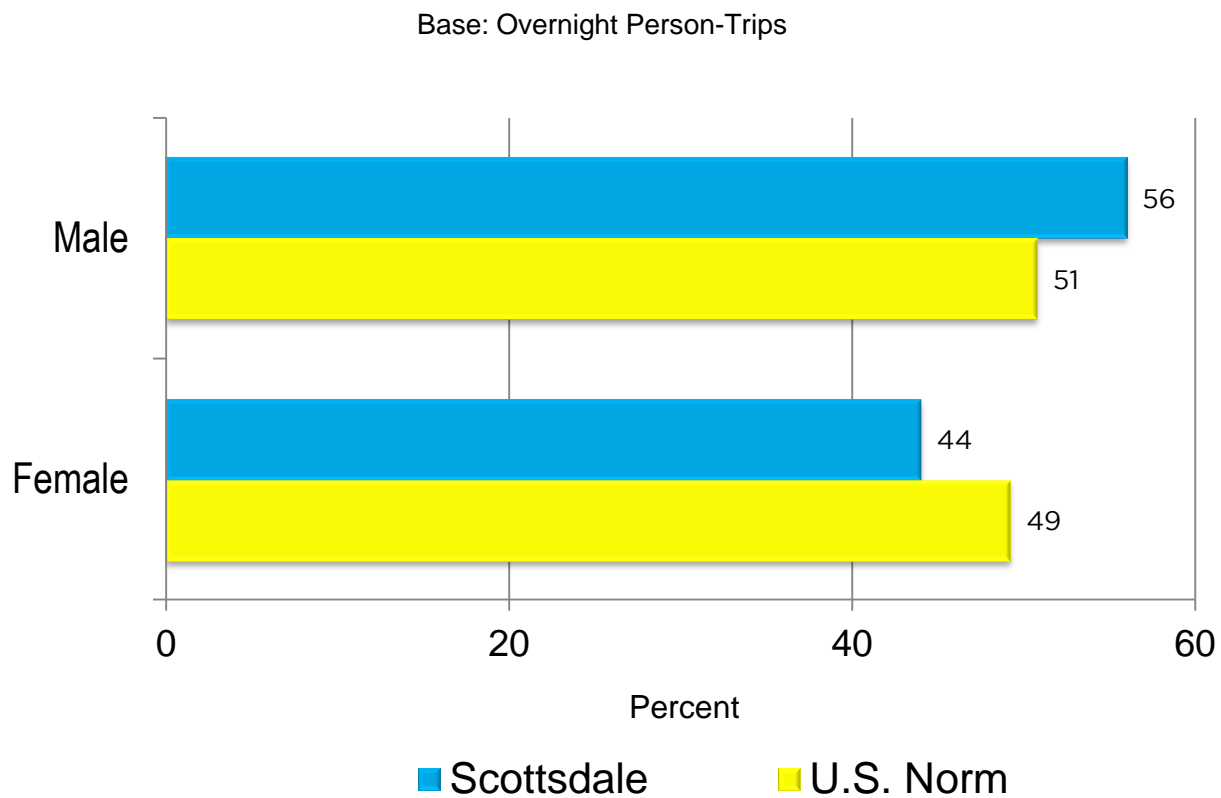




Demographic Profile of Overnight Visitors



Gender

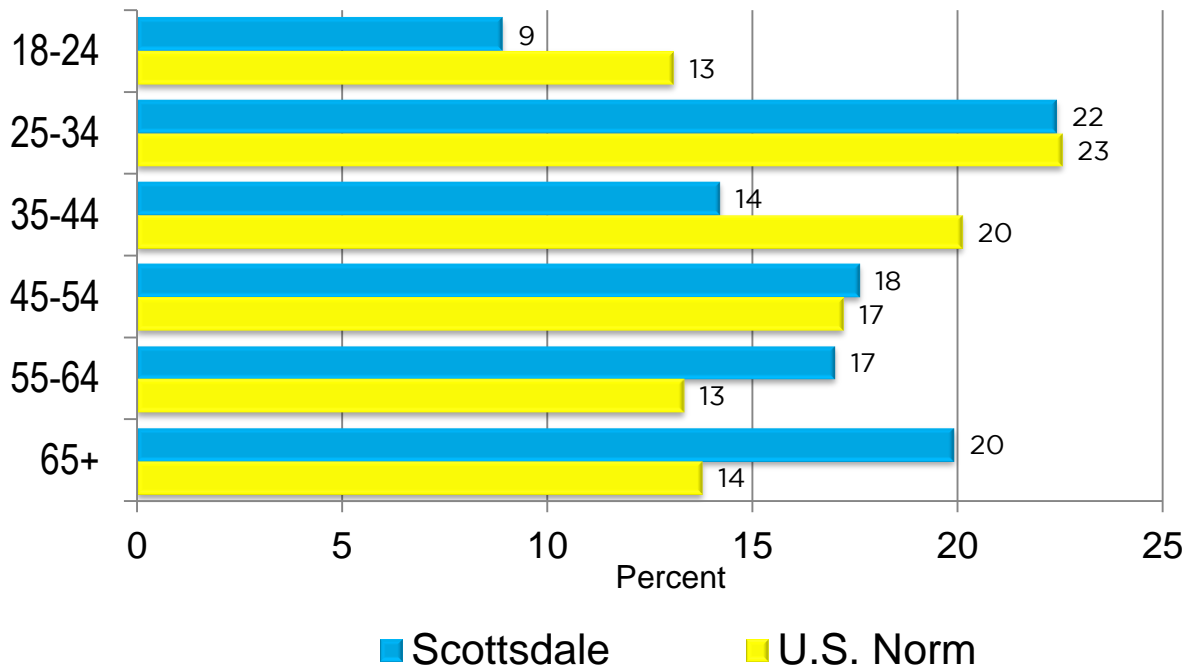


Age

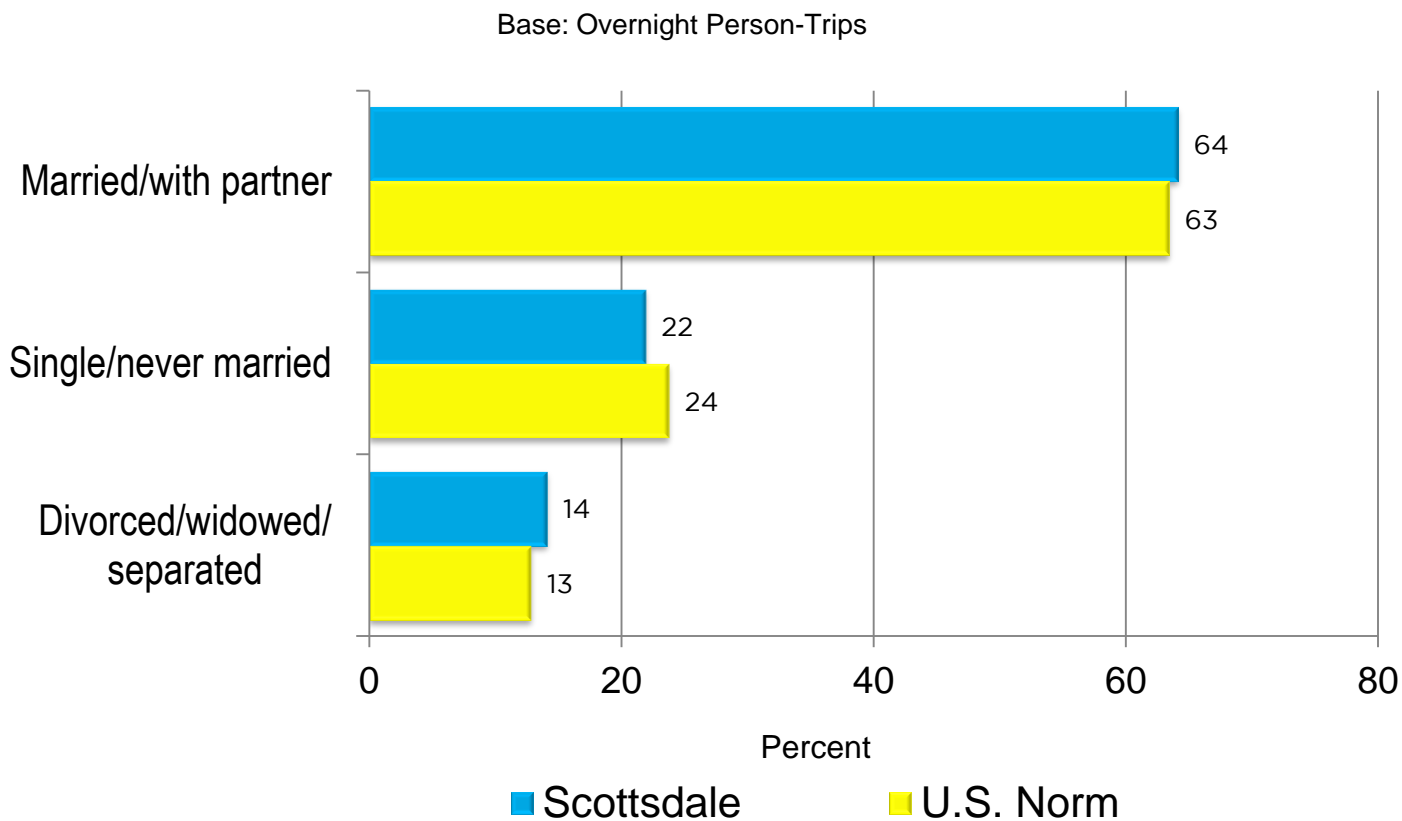
Base: Overnight Person-Trips

Average Scottsdale = 47.2

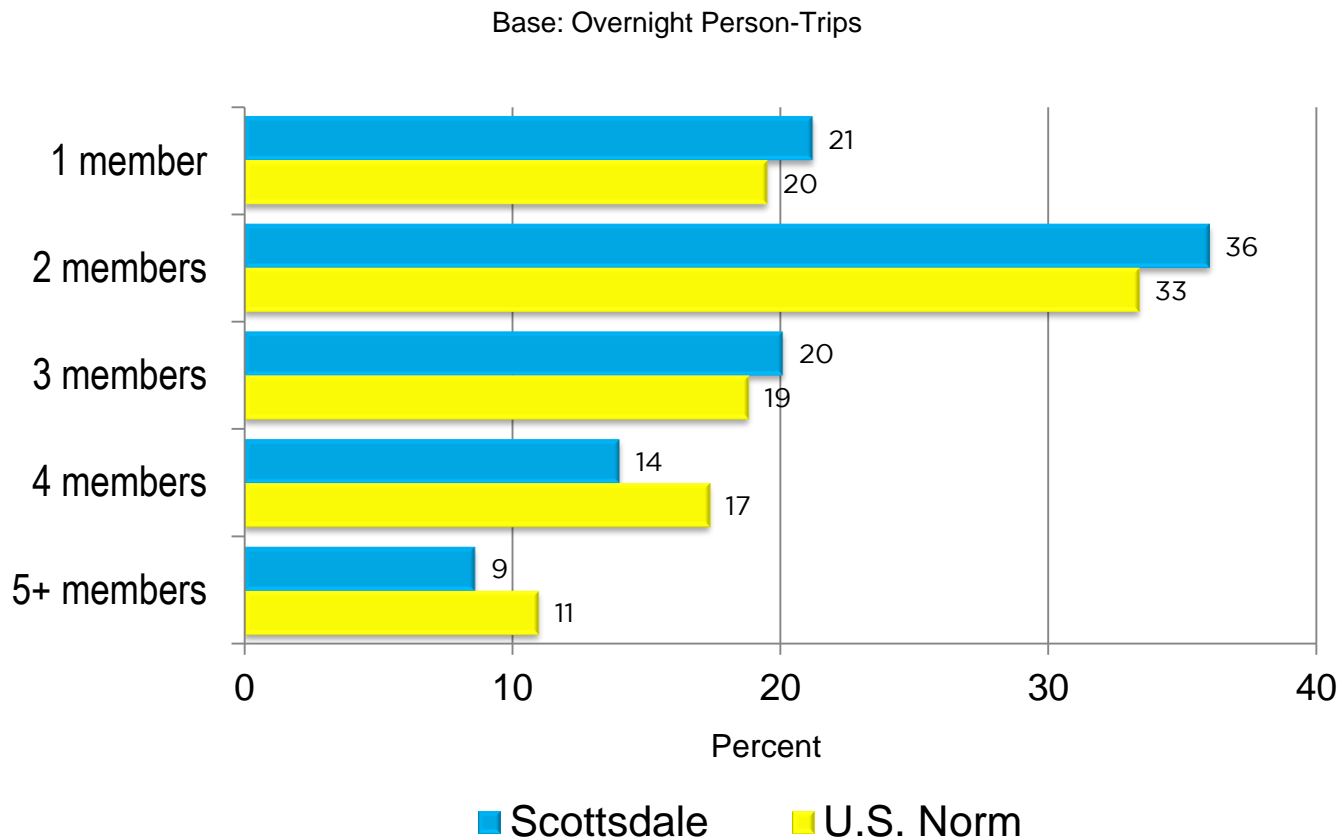
Average U.S. Norm = 43.8



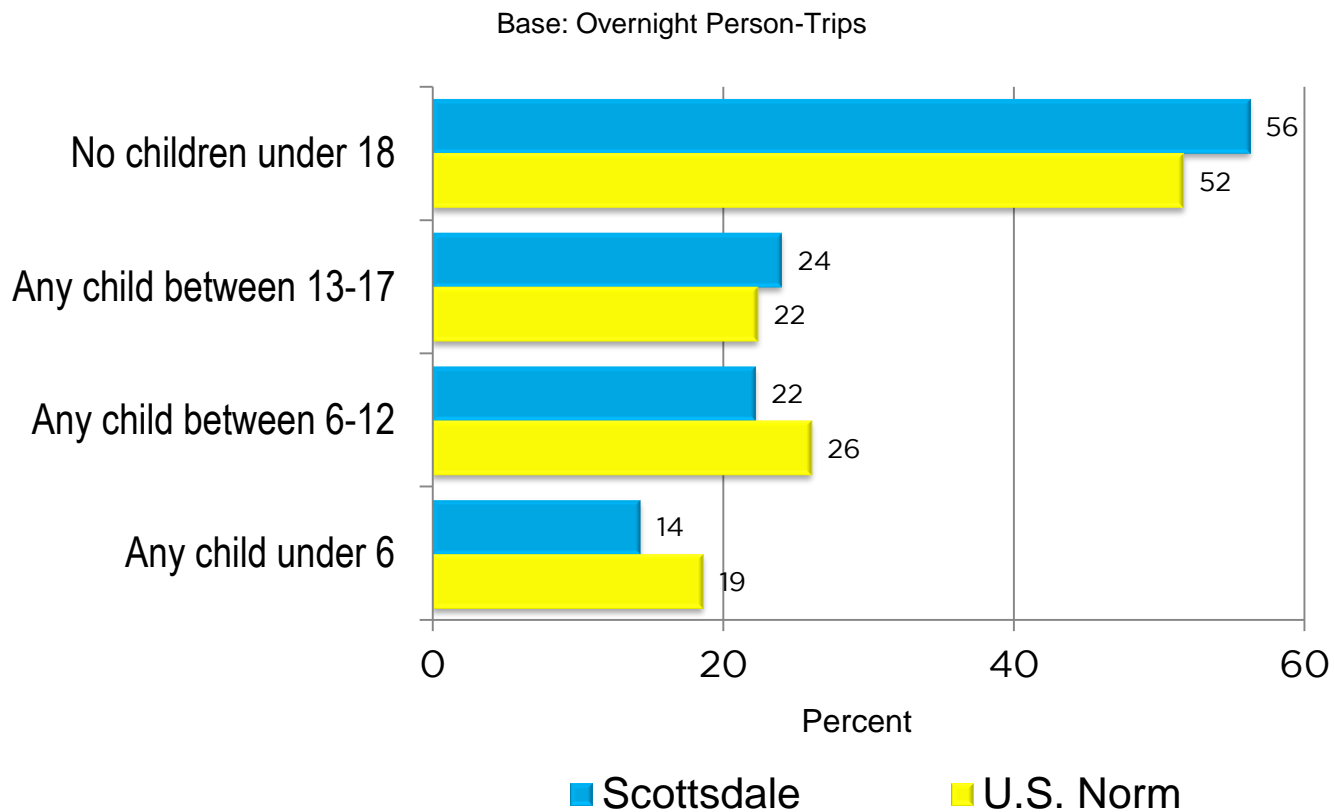
Marital Status



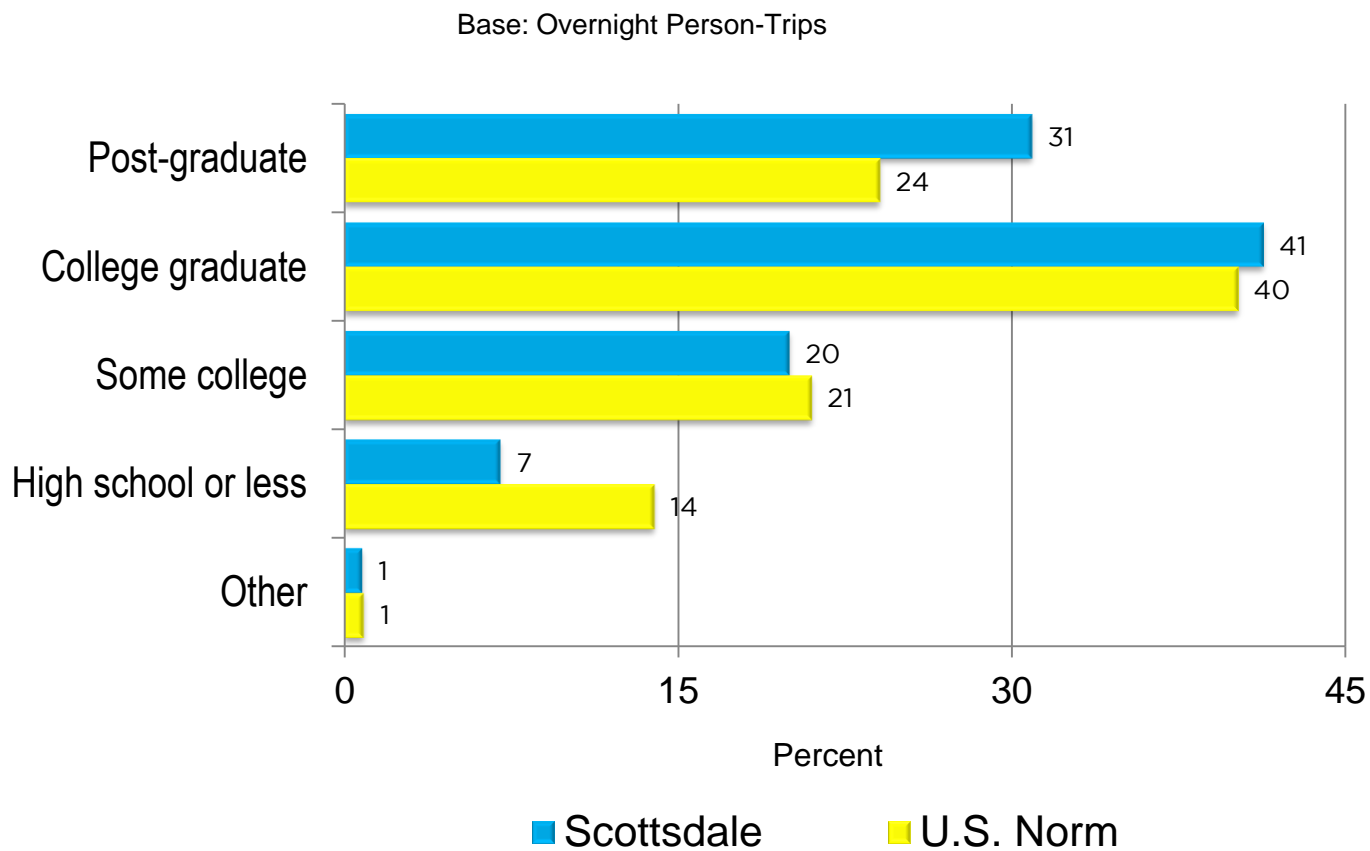
Household Size



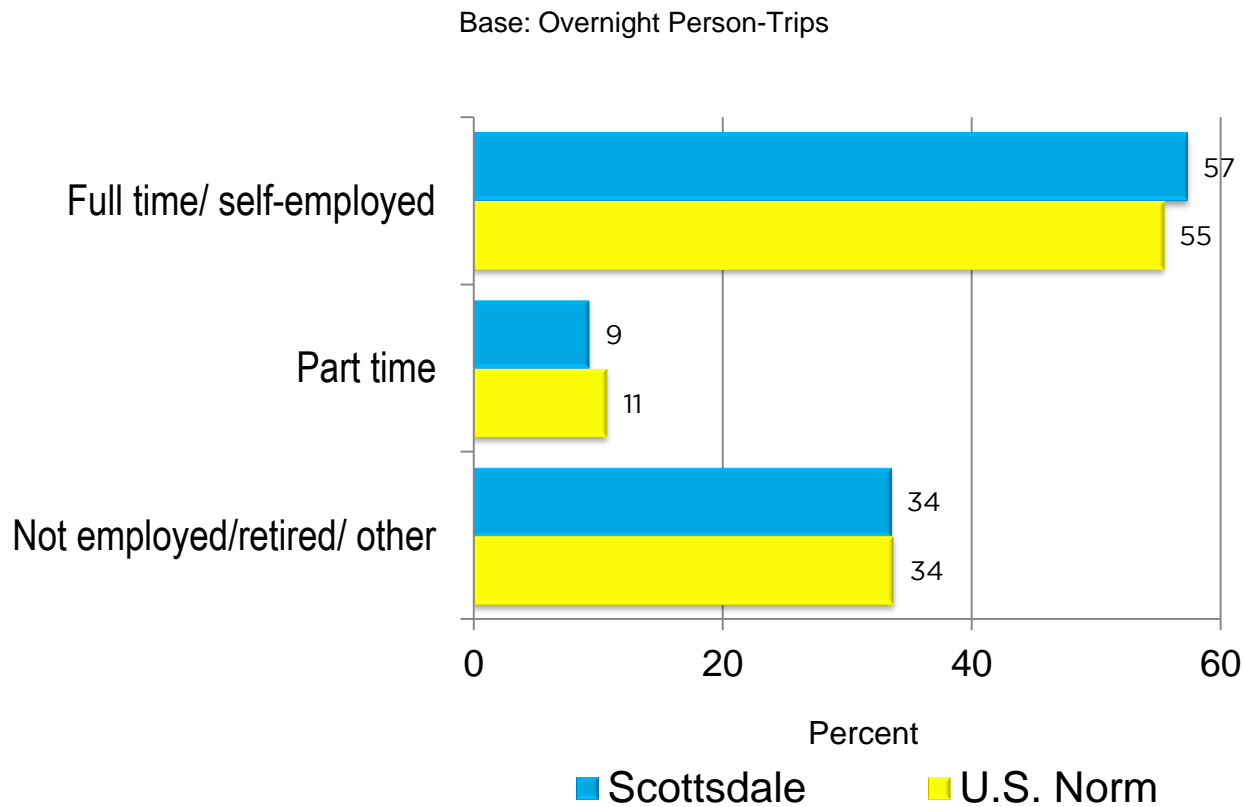
Children in Household



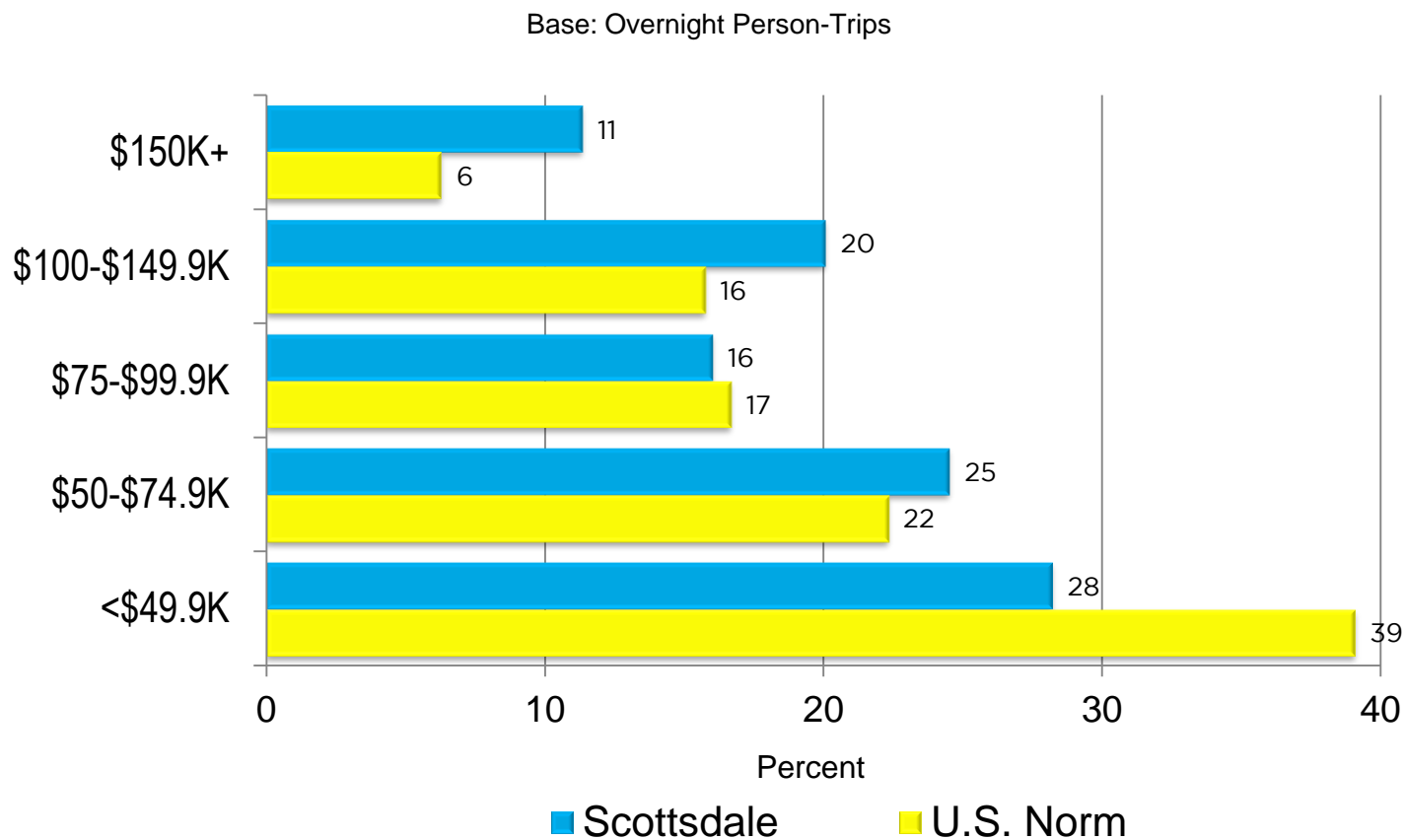
Education



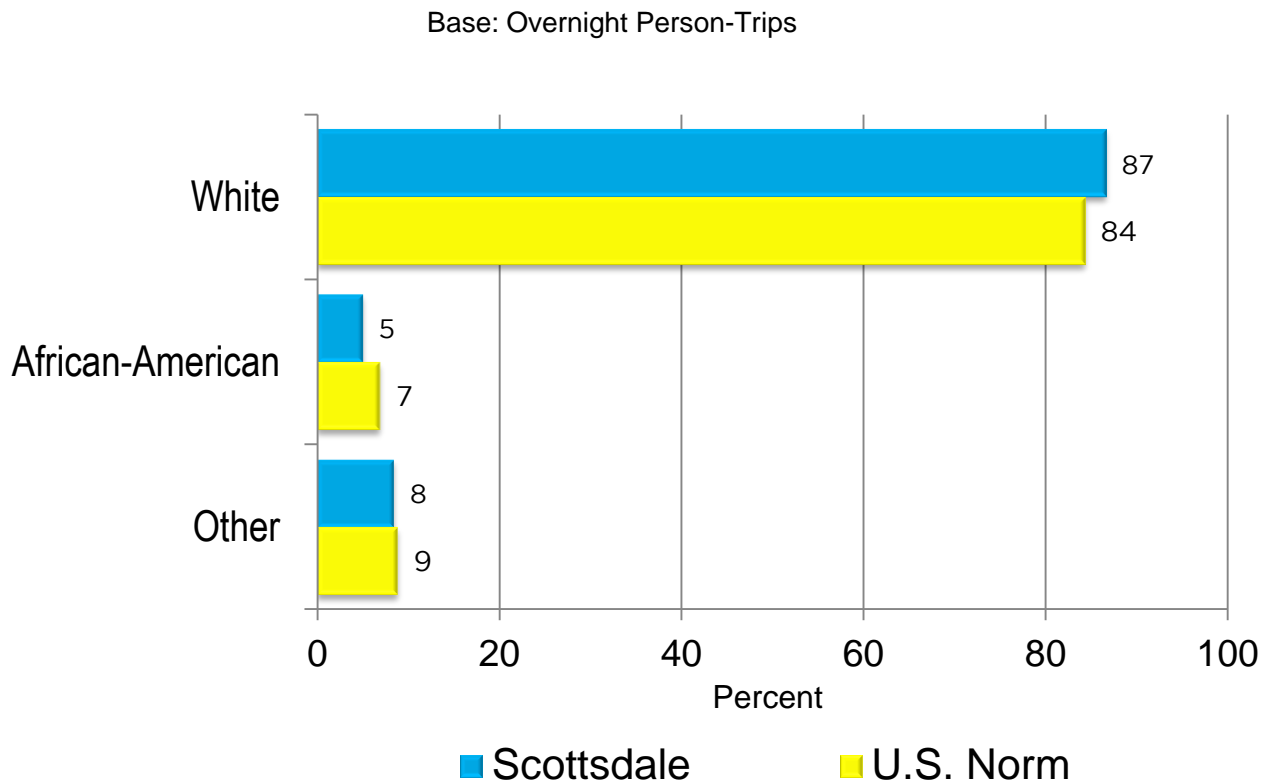
Employment



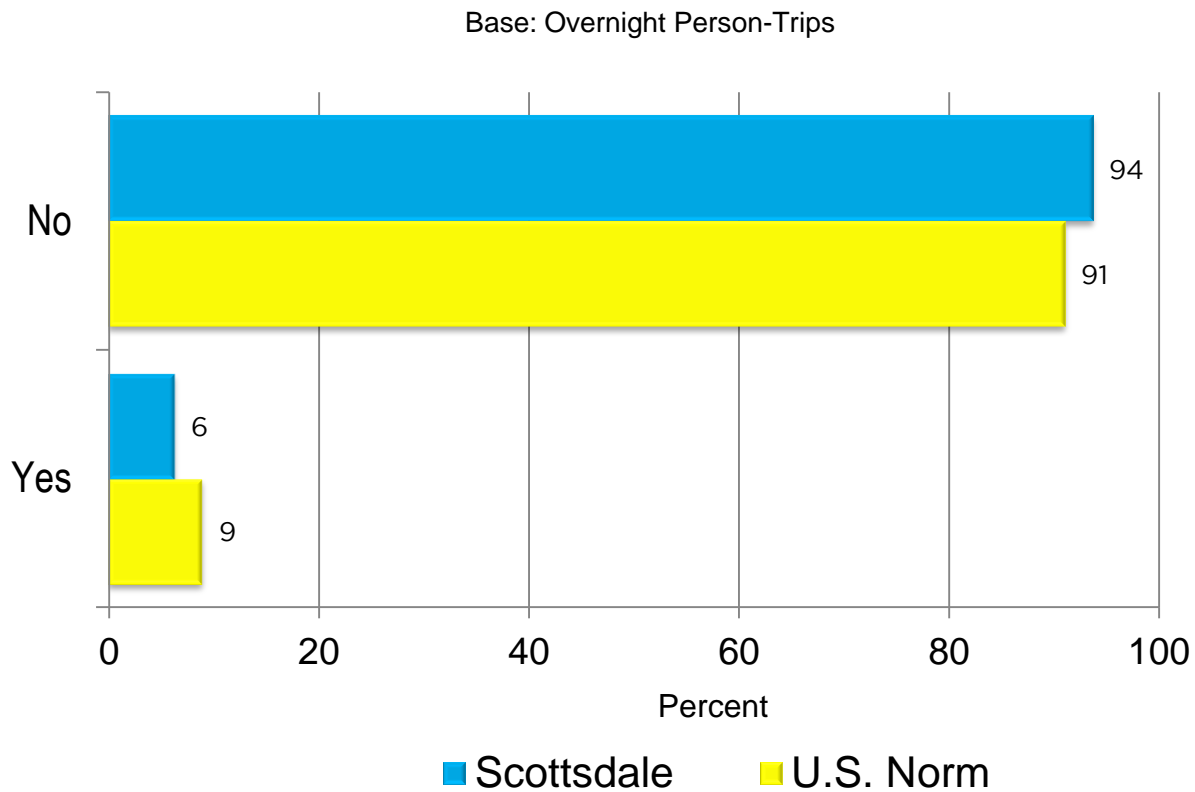
Household Income



Race



Hispanic Background





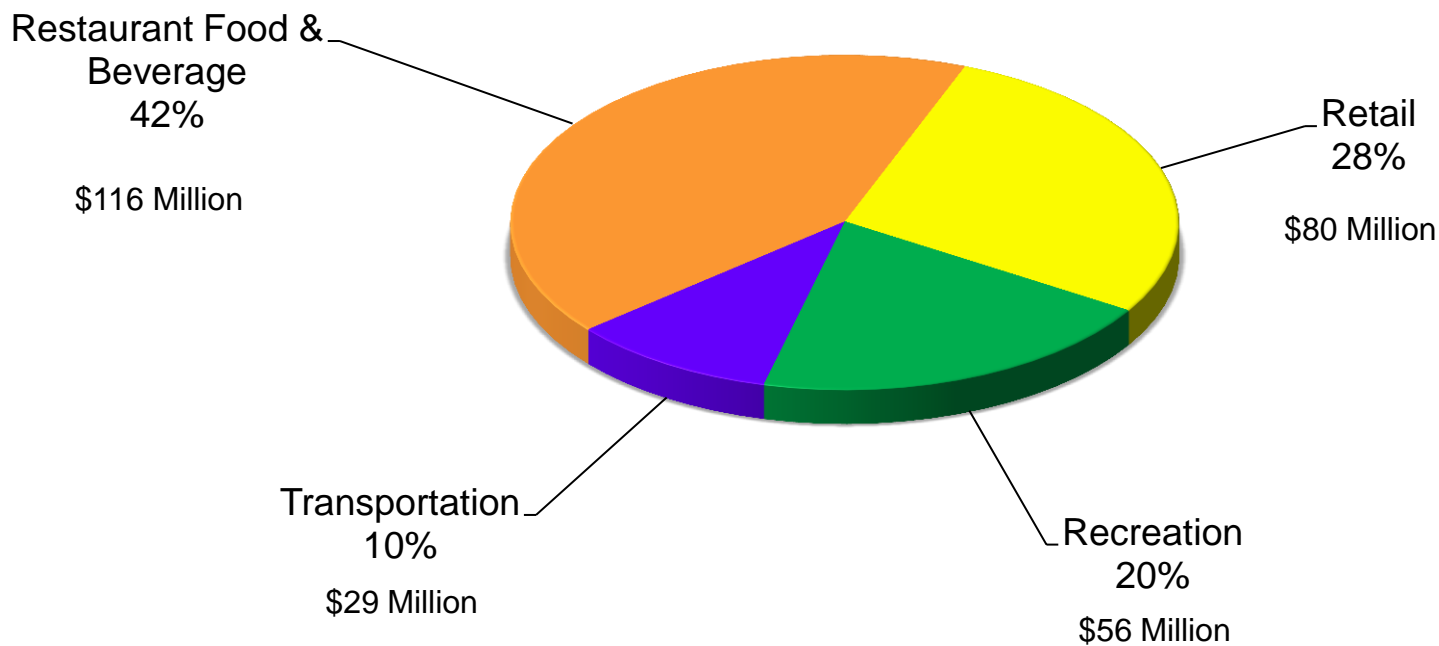
Day Trip Expenditures



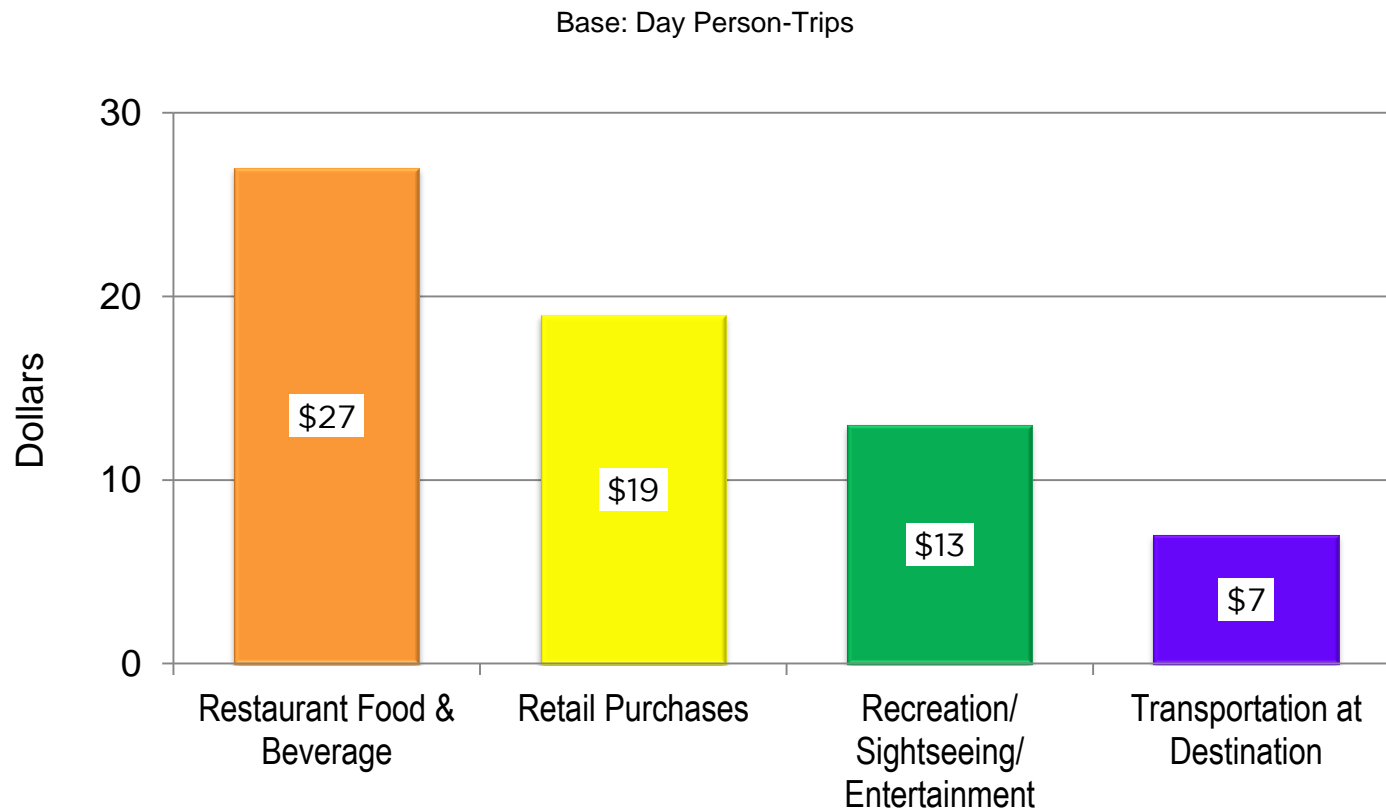
Total Scottsdale Domestic Day Trip Spending — by Sector

Total Spending = \$281 Million

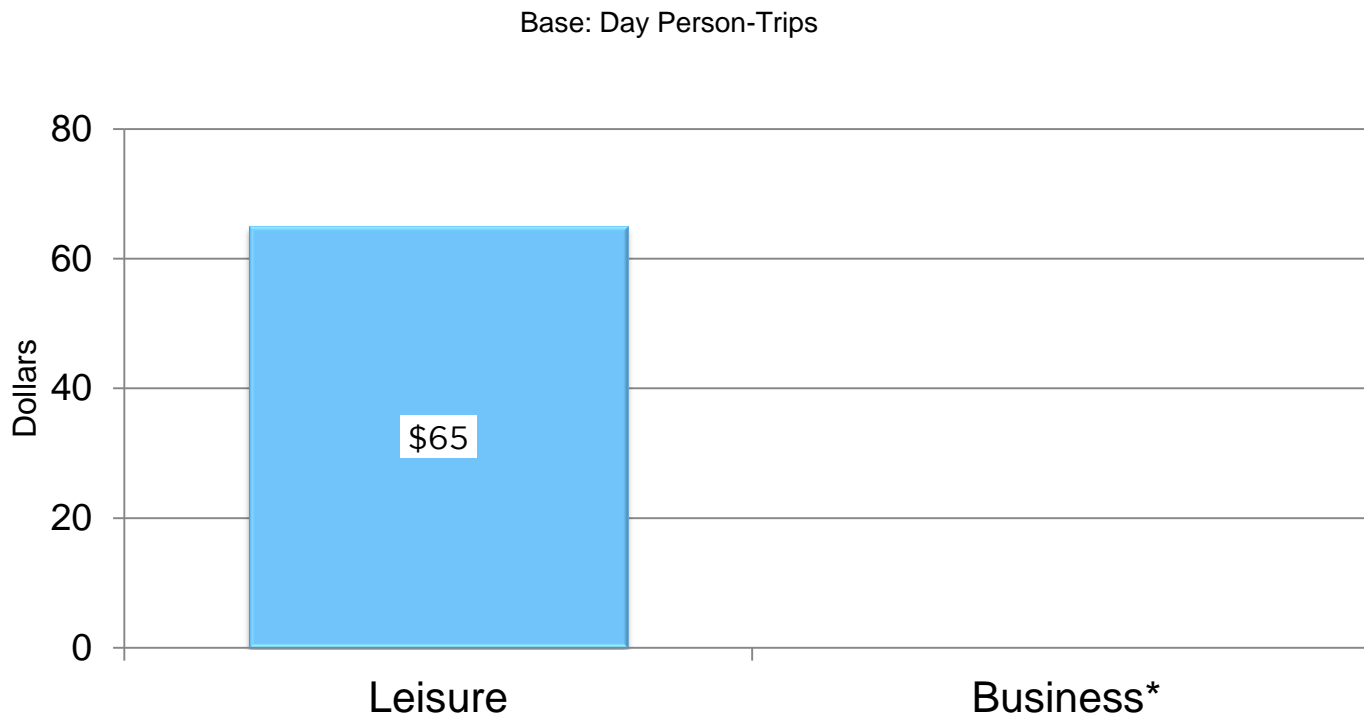
+5.7% vs. 2015



Average Per Person Expenditures on Day Trips — By Sector

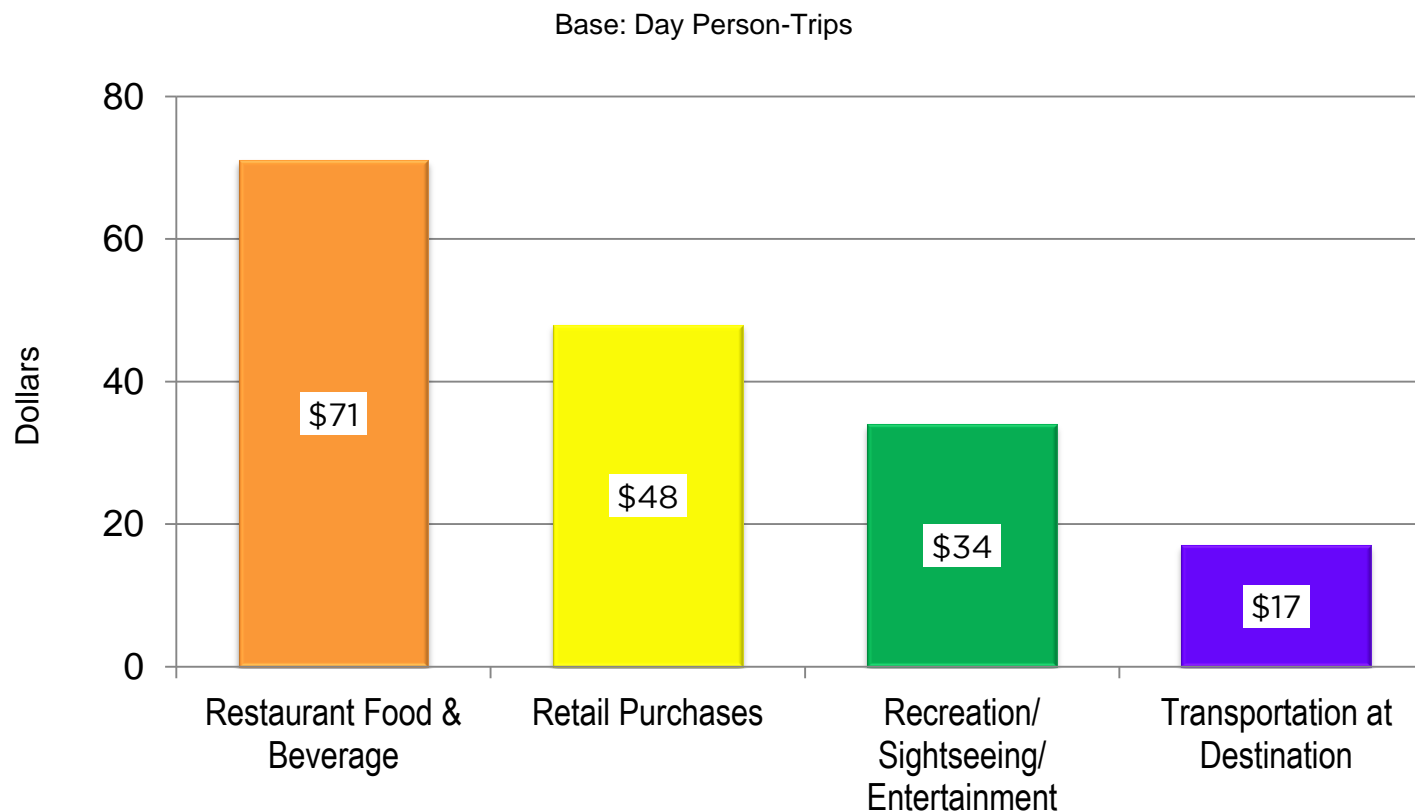


Average Per Person Expenditures on Day Trips — by Trip Purpose

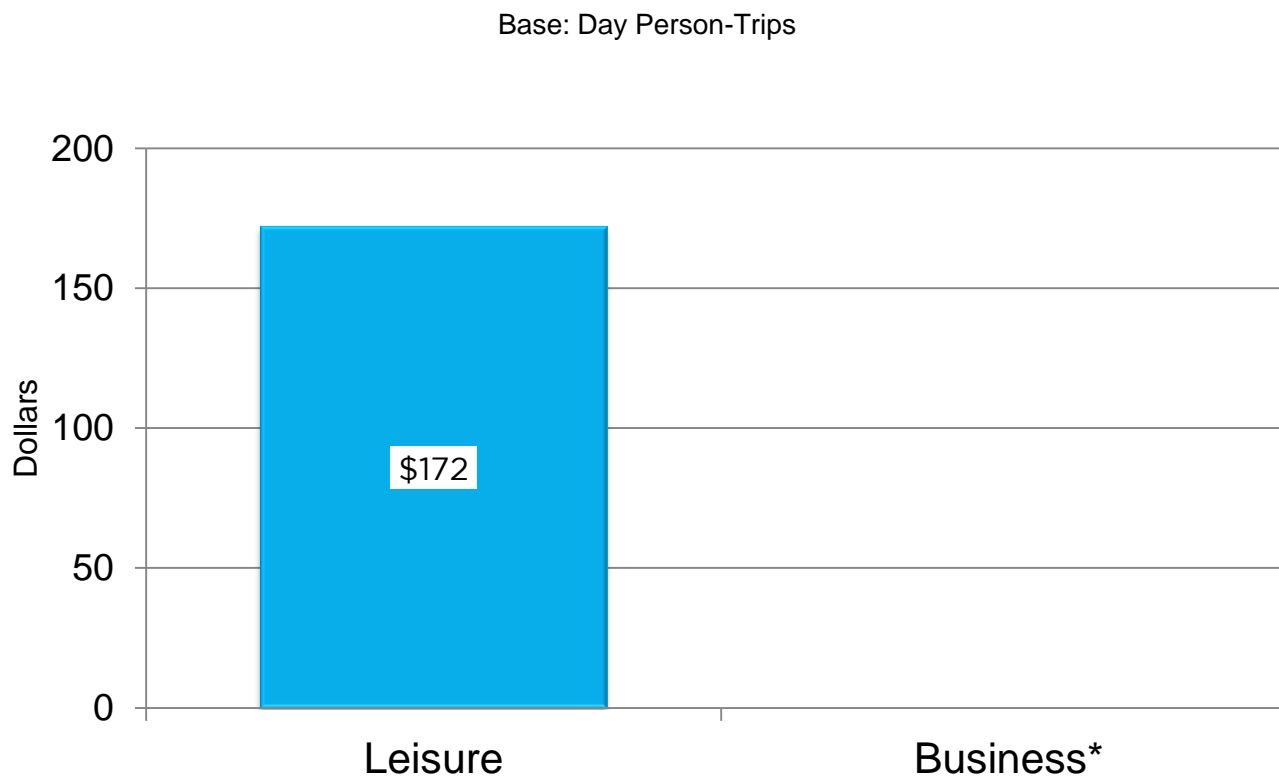


* Low Business Base

Average Per Party Expenditures on Day Trips — By Sector



Average Per Party Expenditures on Day Trip — by Trip Purpose



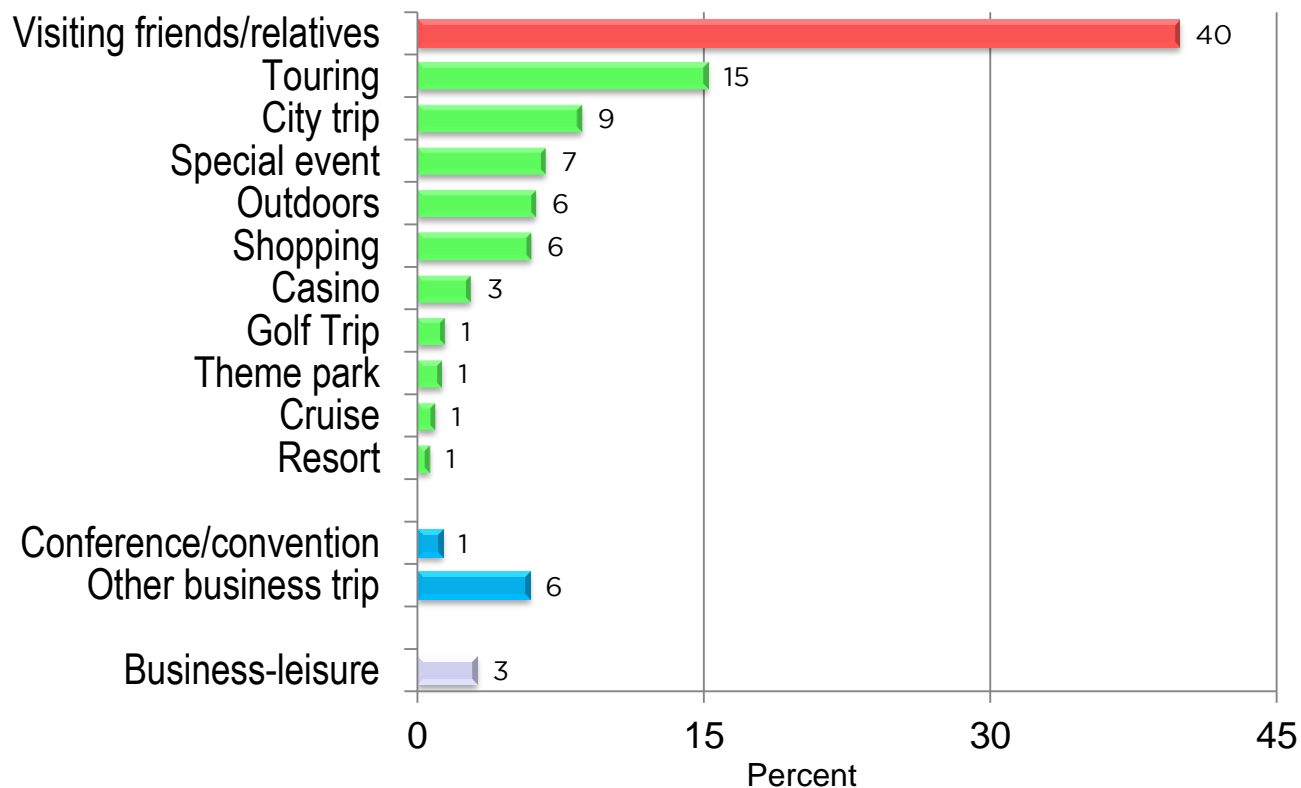


Day Trip Characteristics



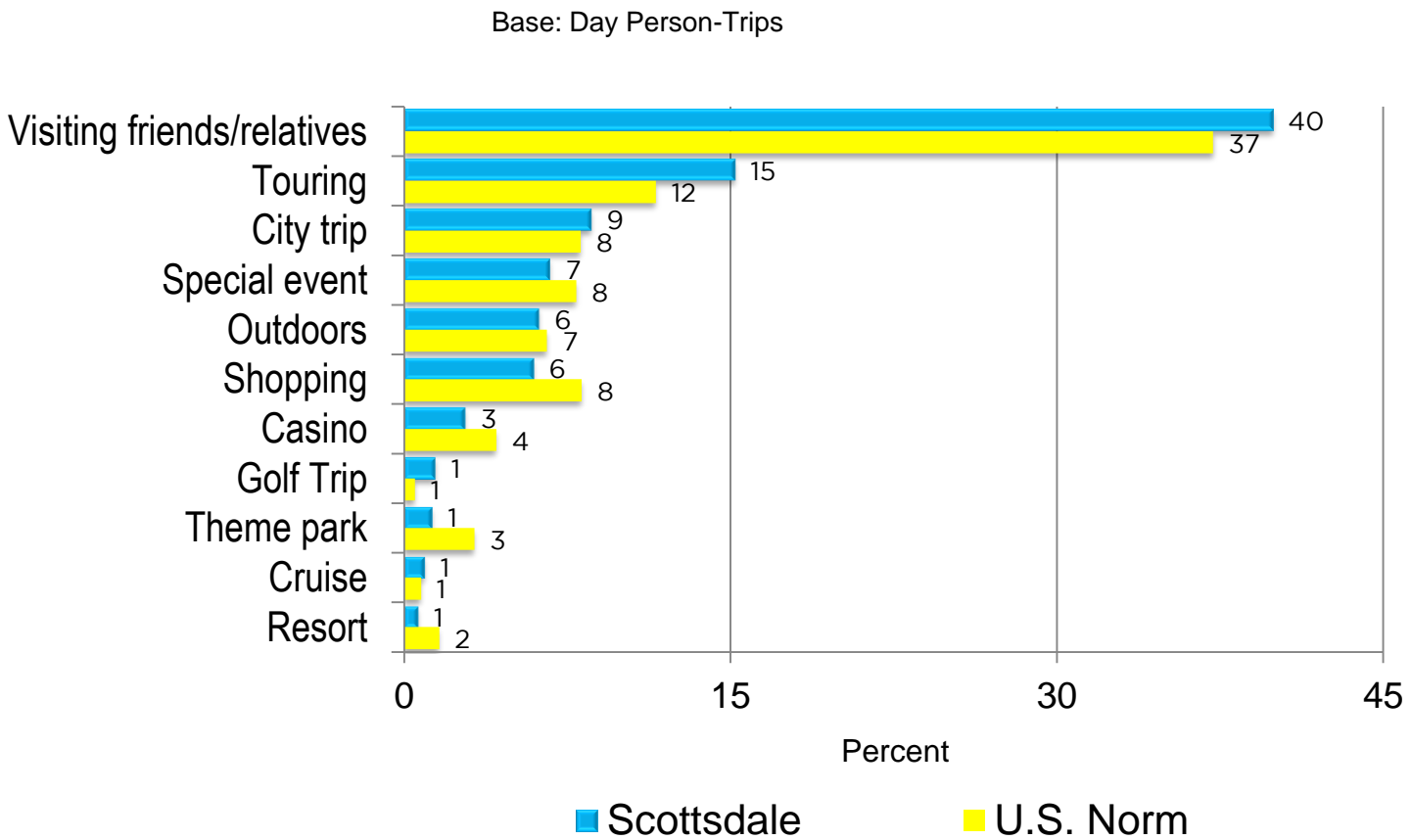
Main Purpose of Trip

Base: Day Person-Trips

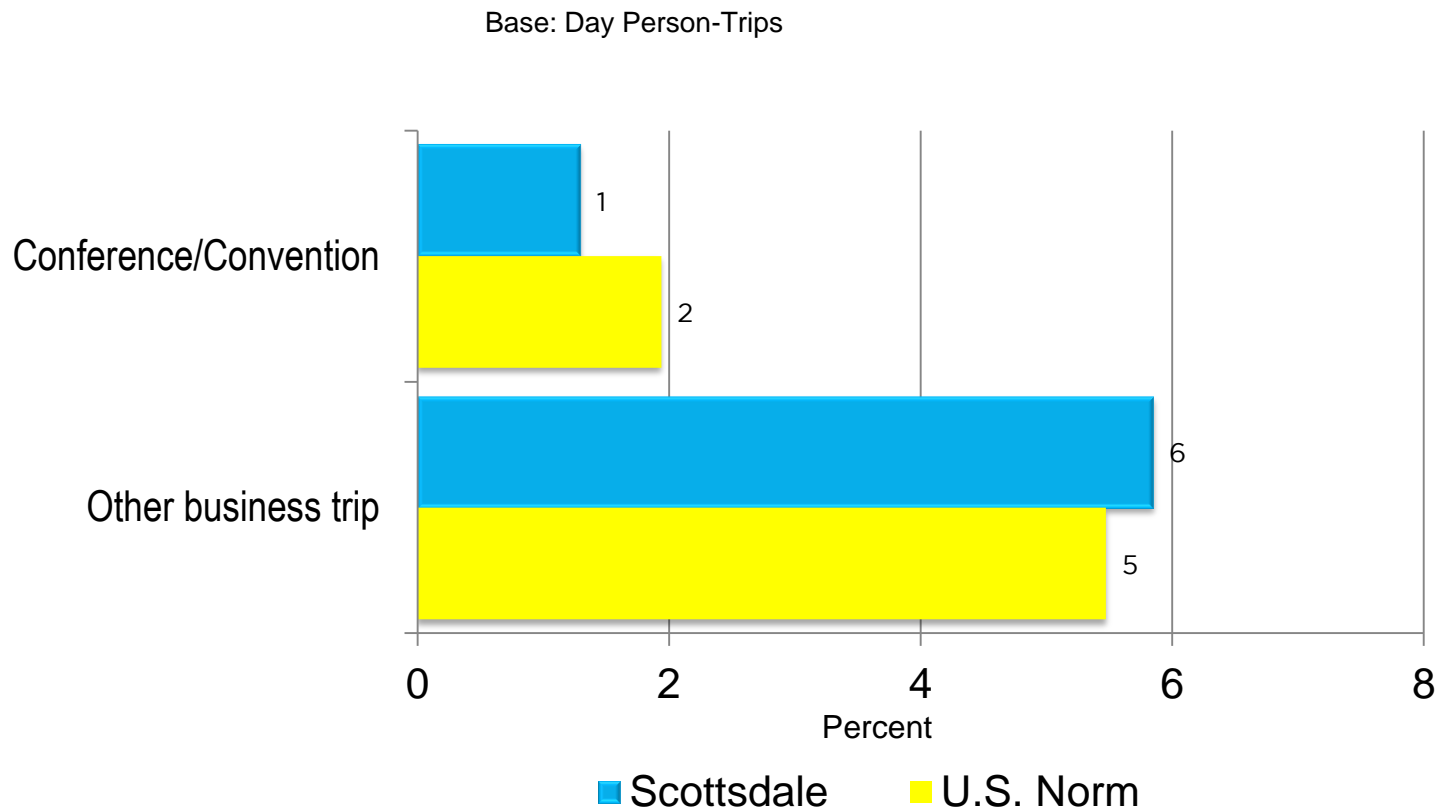


Marketable
Trips
50%

Main Purpose of Leisure Trip — Scottsdale vs. National Norm

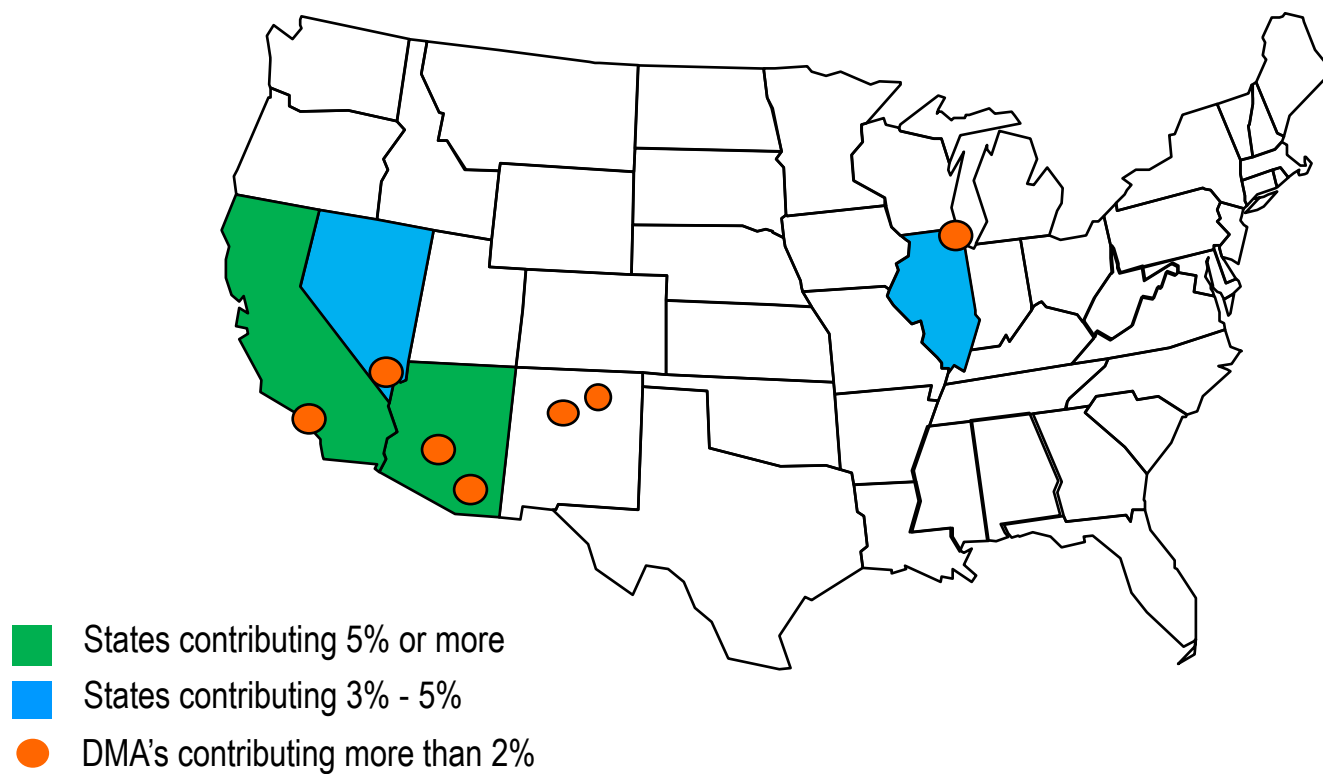


Main Purpose of Day Business Trip — Scottsdale vs. National Norm

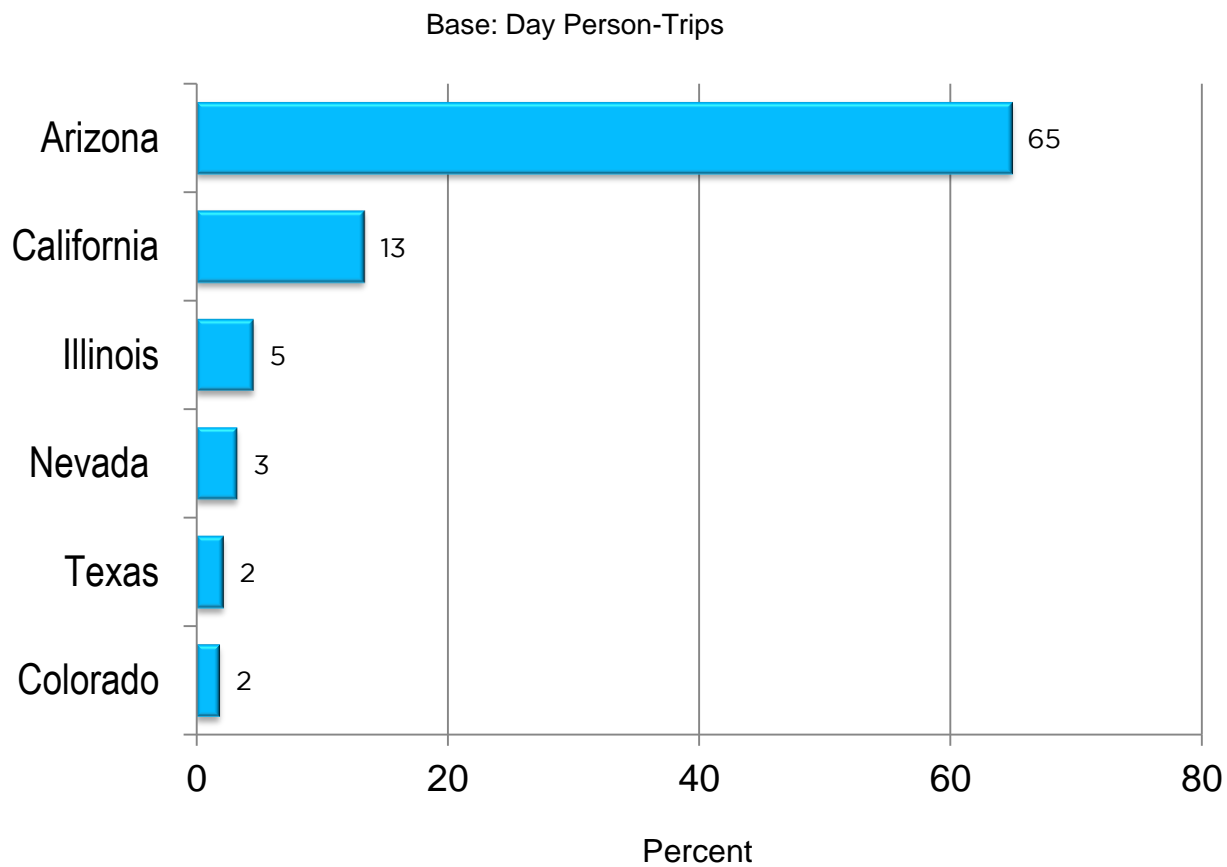


Sources of Business

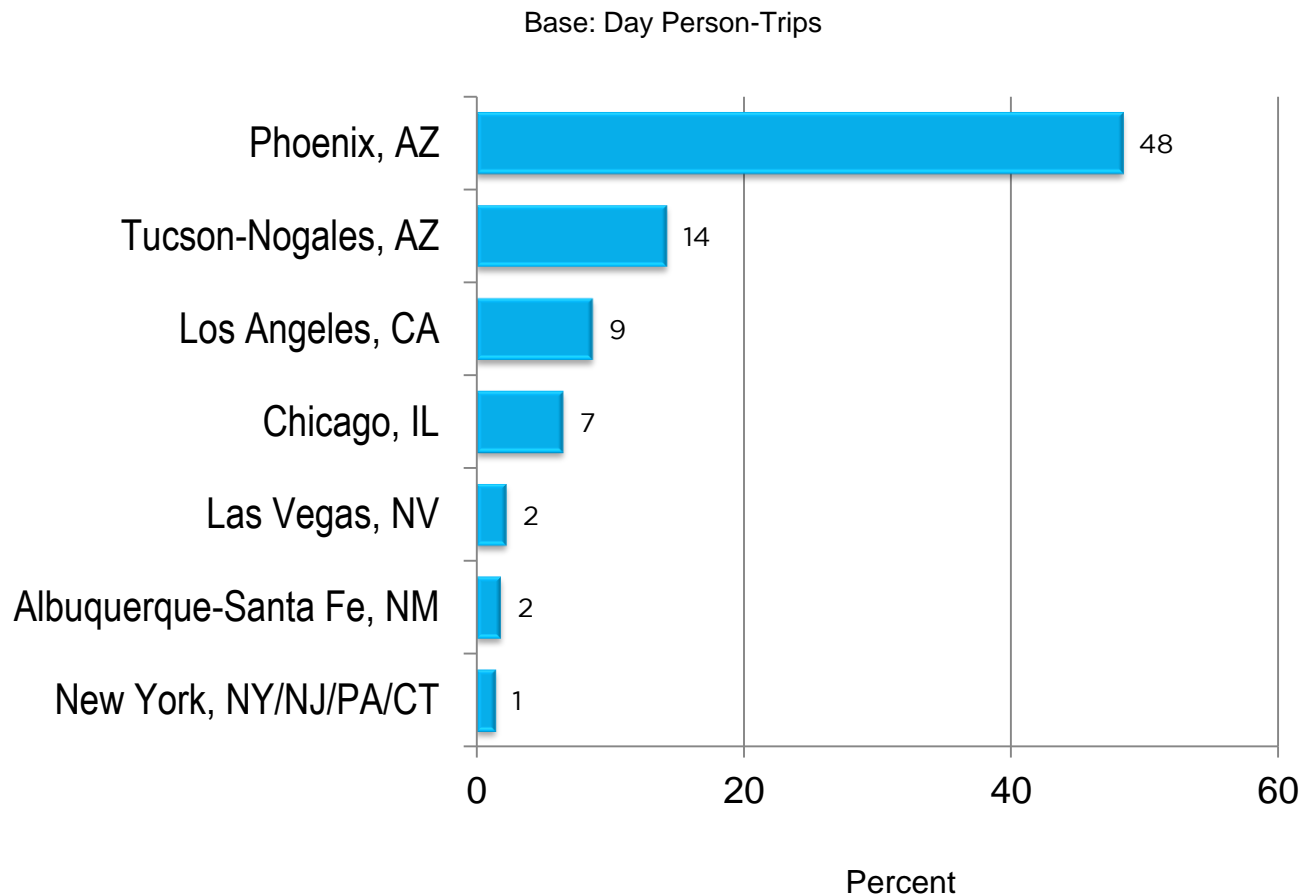
Base: Day Person-Trips



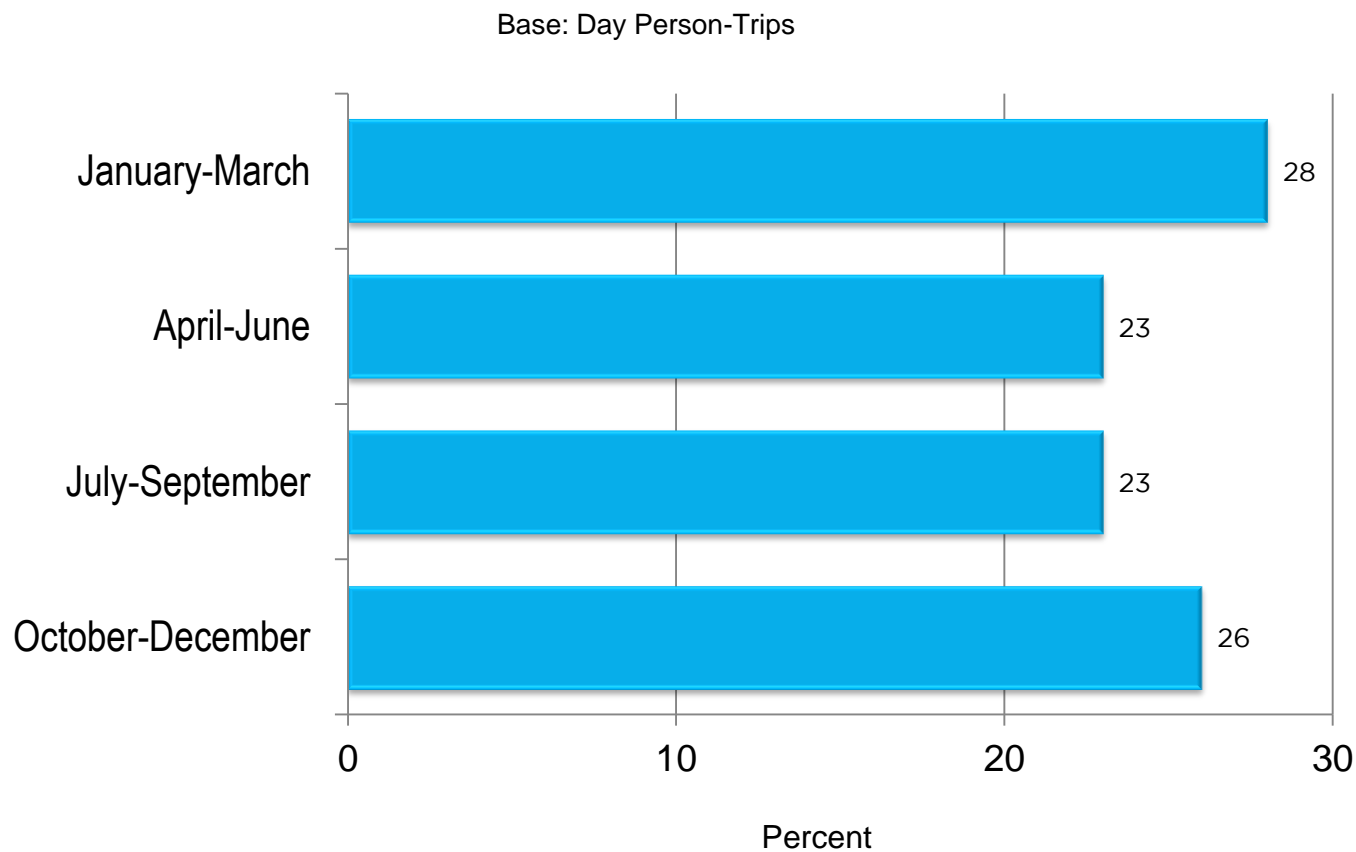
State Origin Of Trip



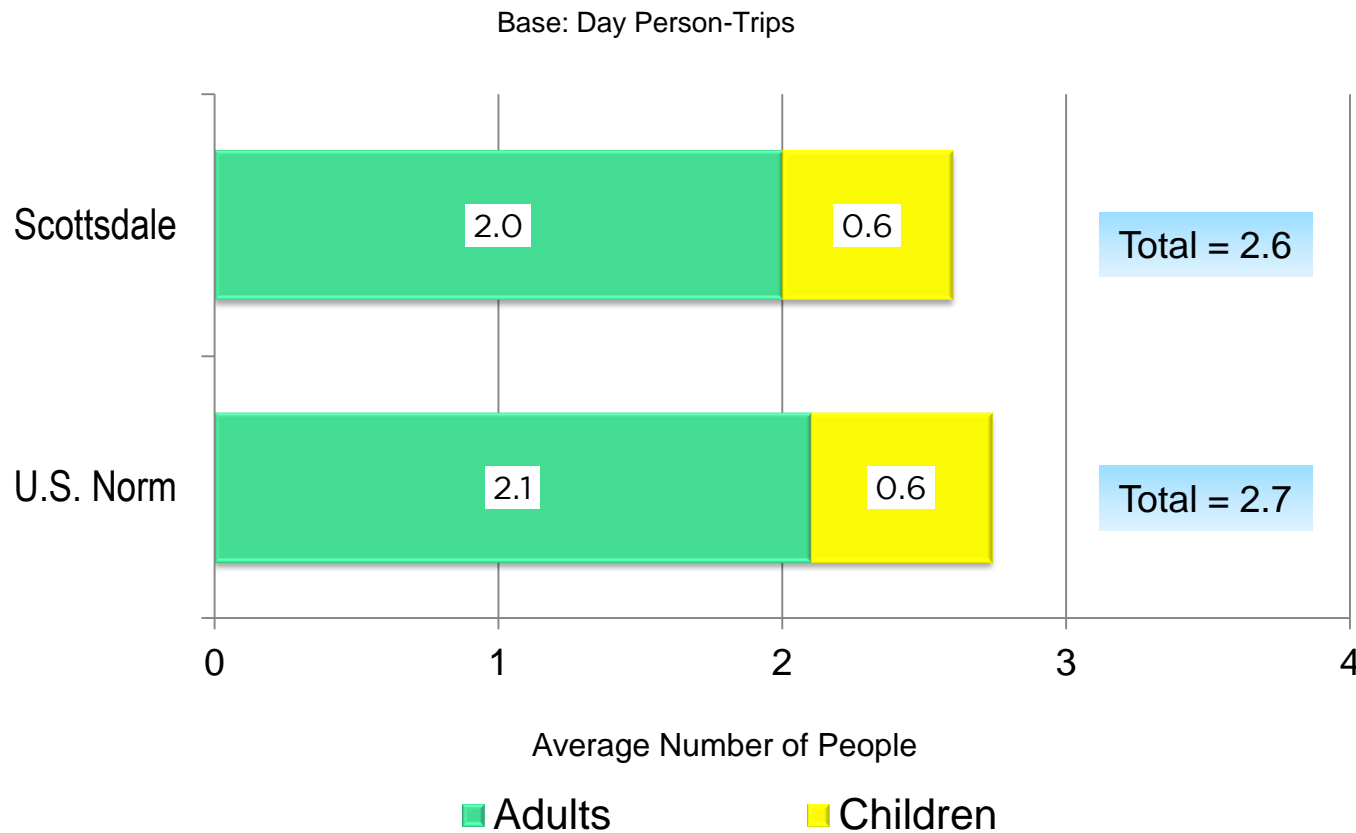
DMA Origin Of Trip



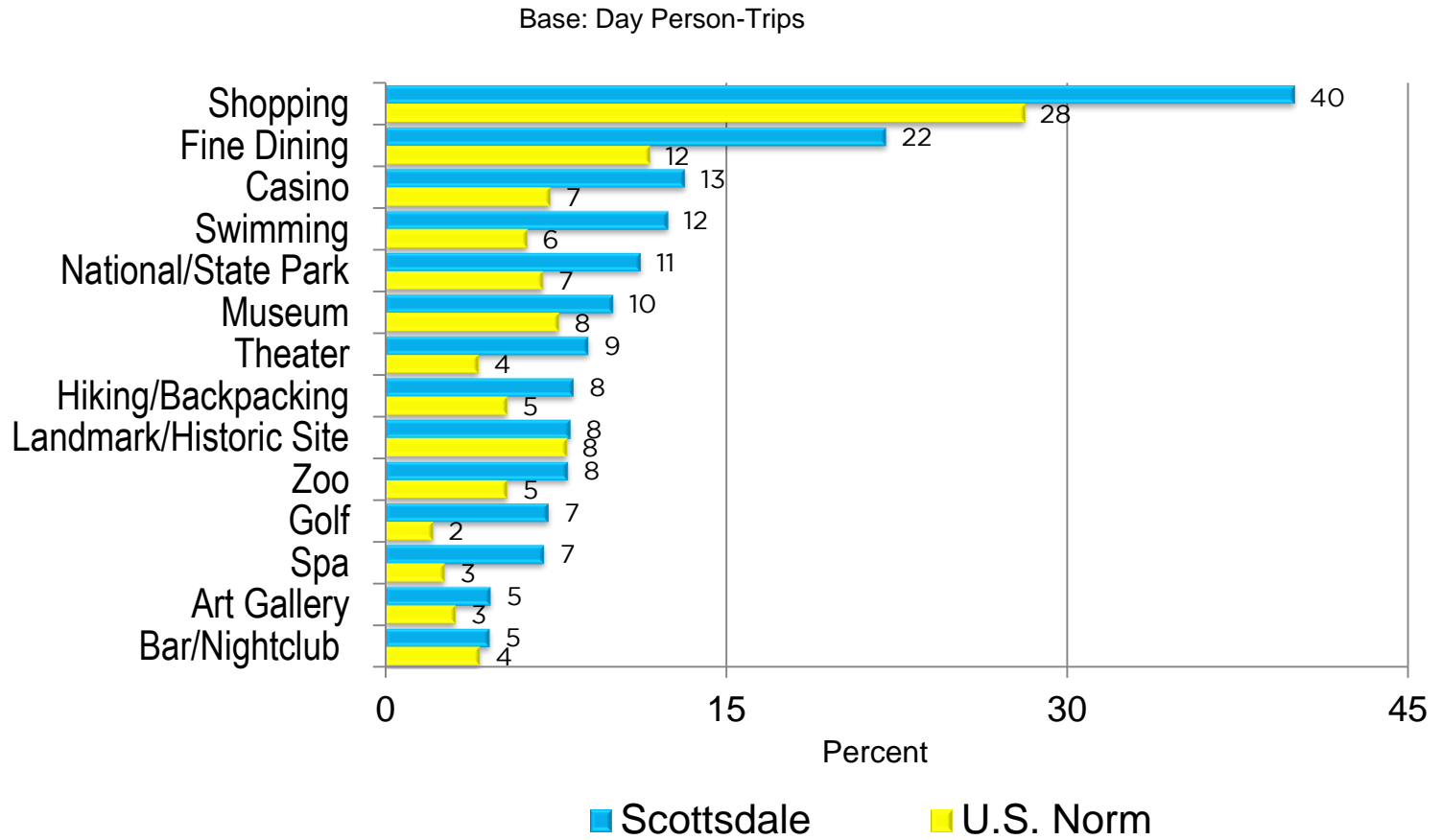
Season of Trip



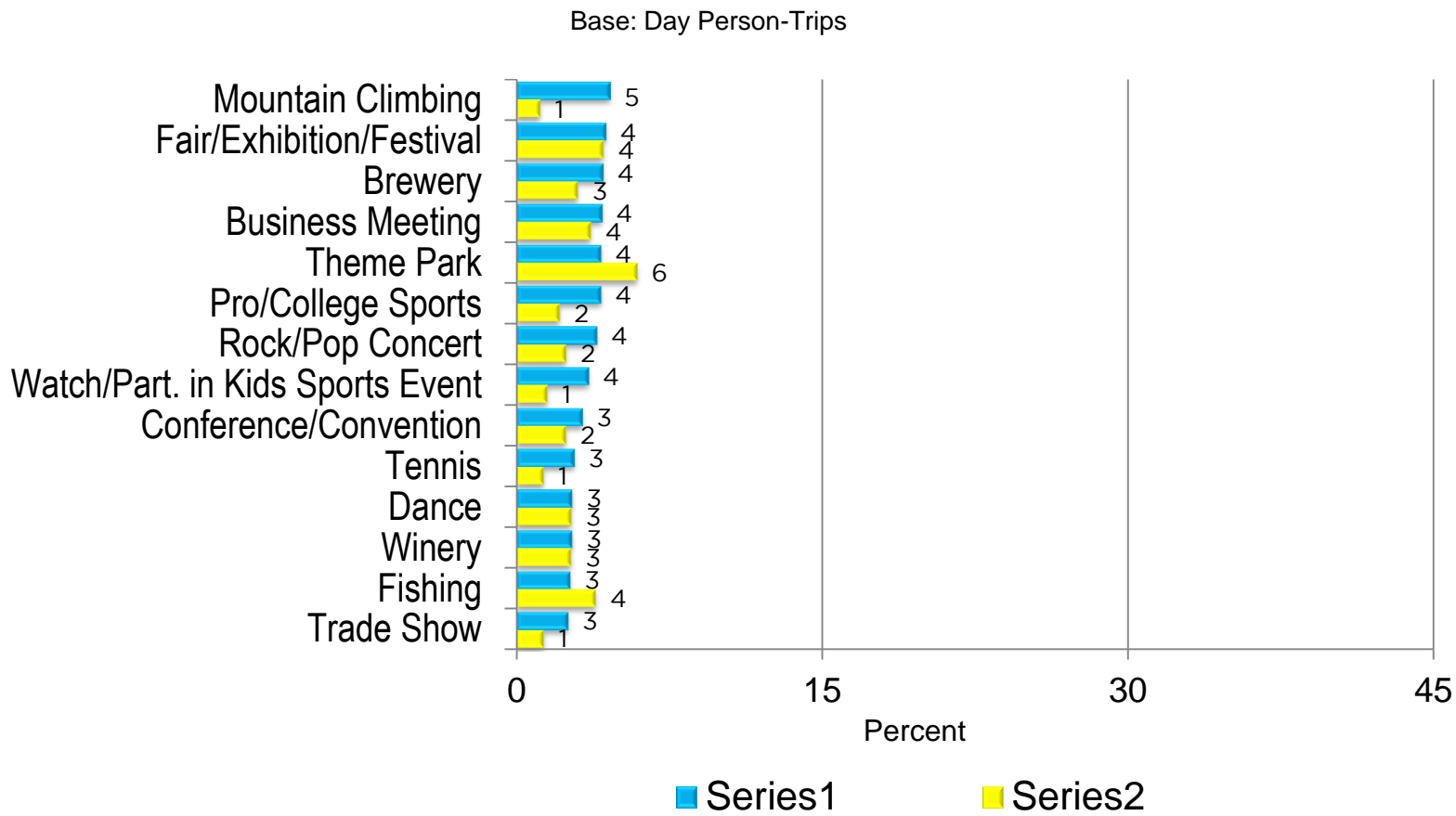
Size of Travel Party



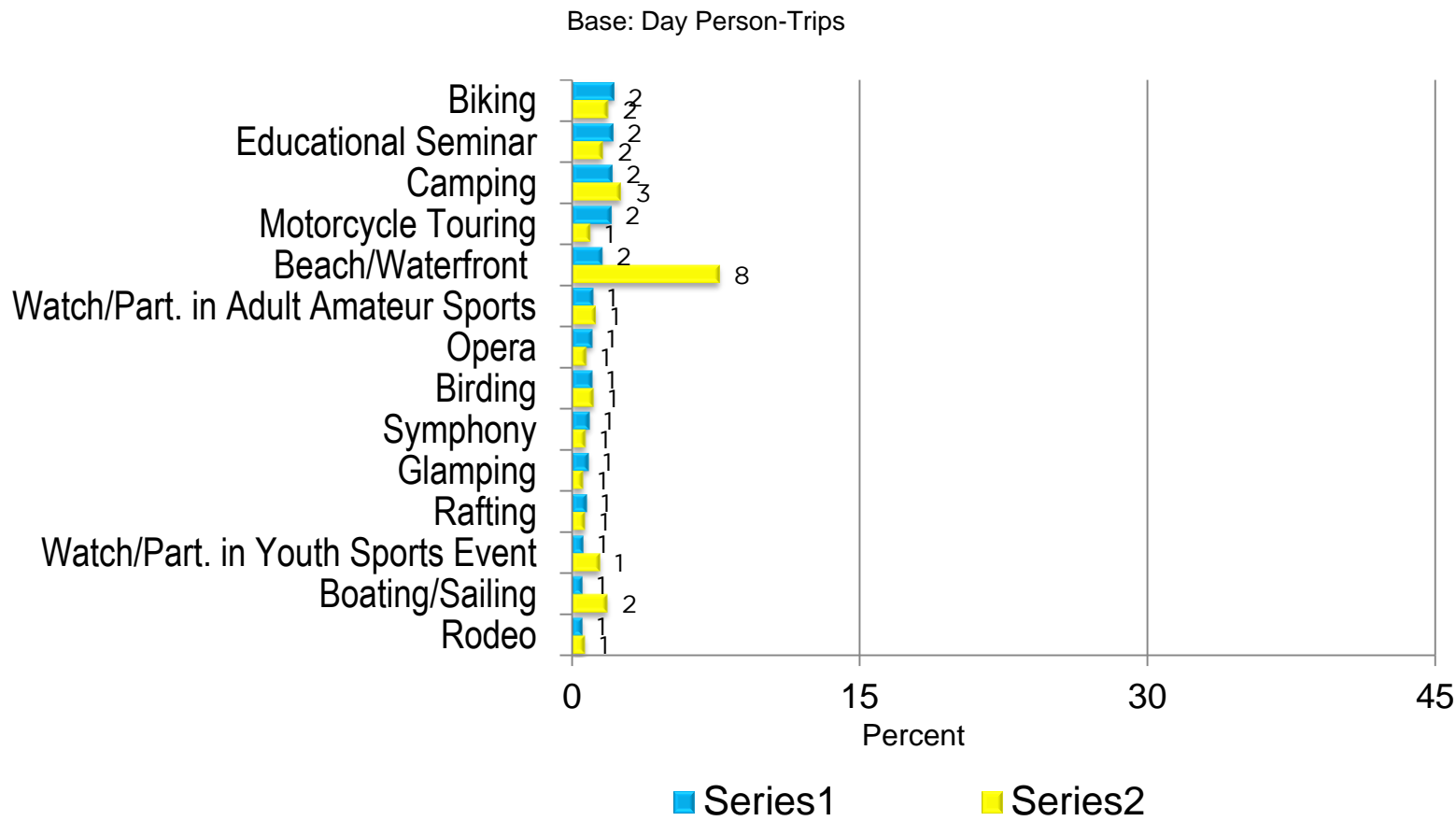
Activities and Experiences



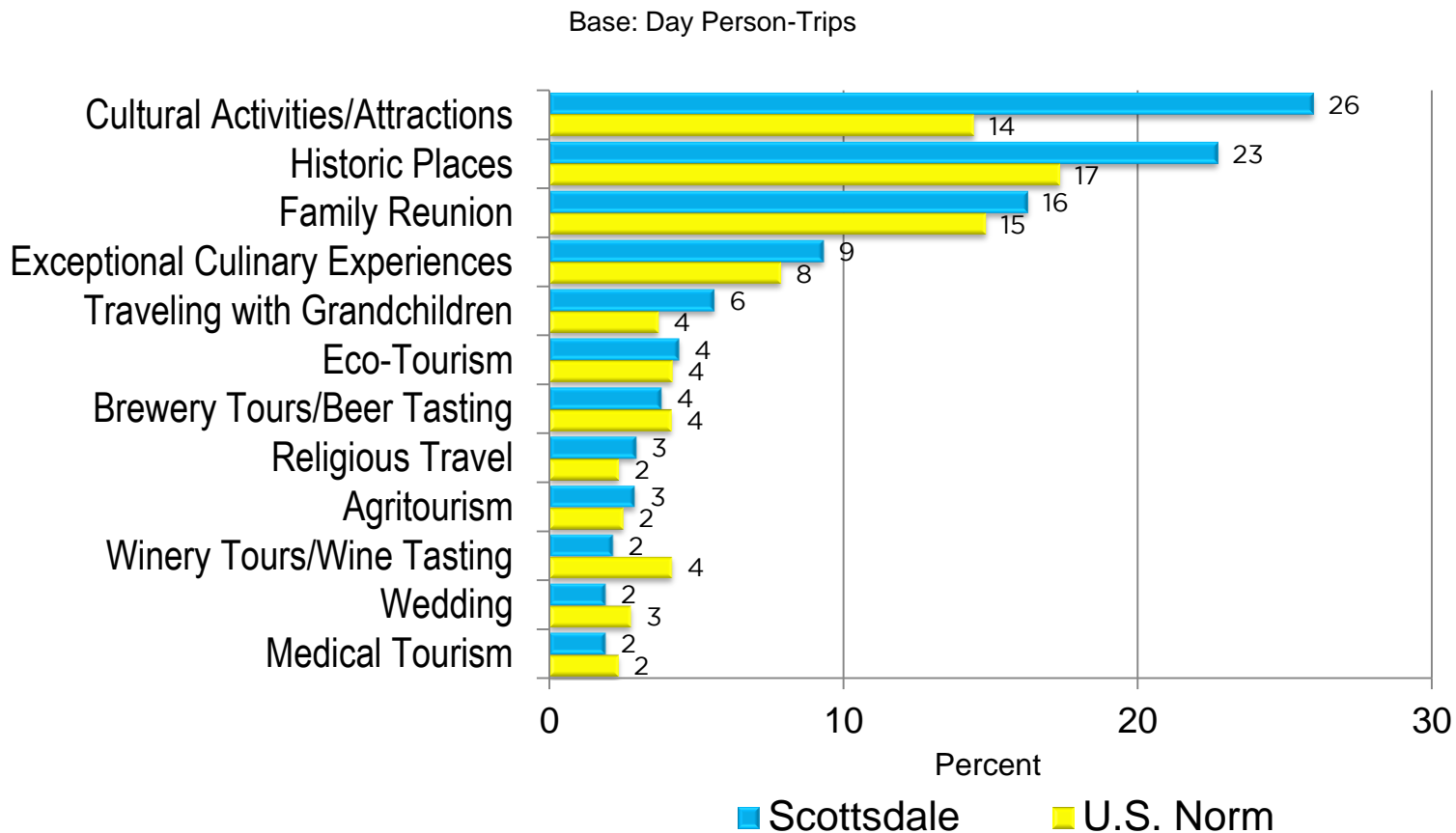
Activities and Experiences



Activities and Experiences

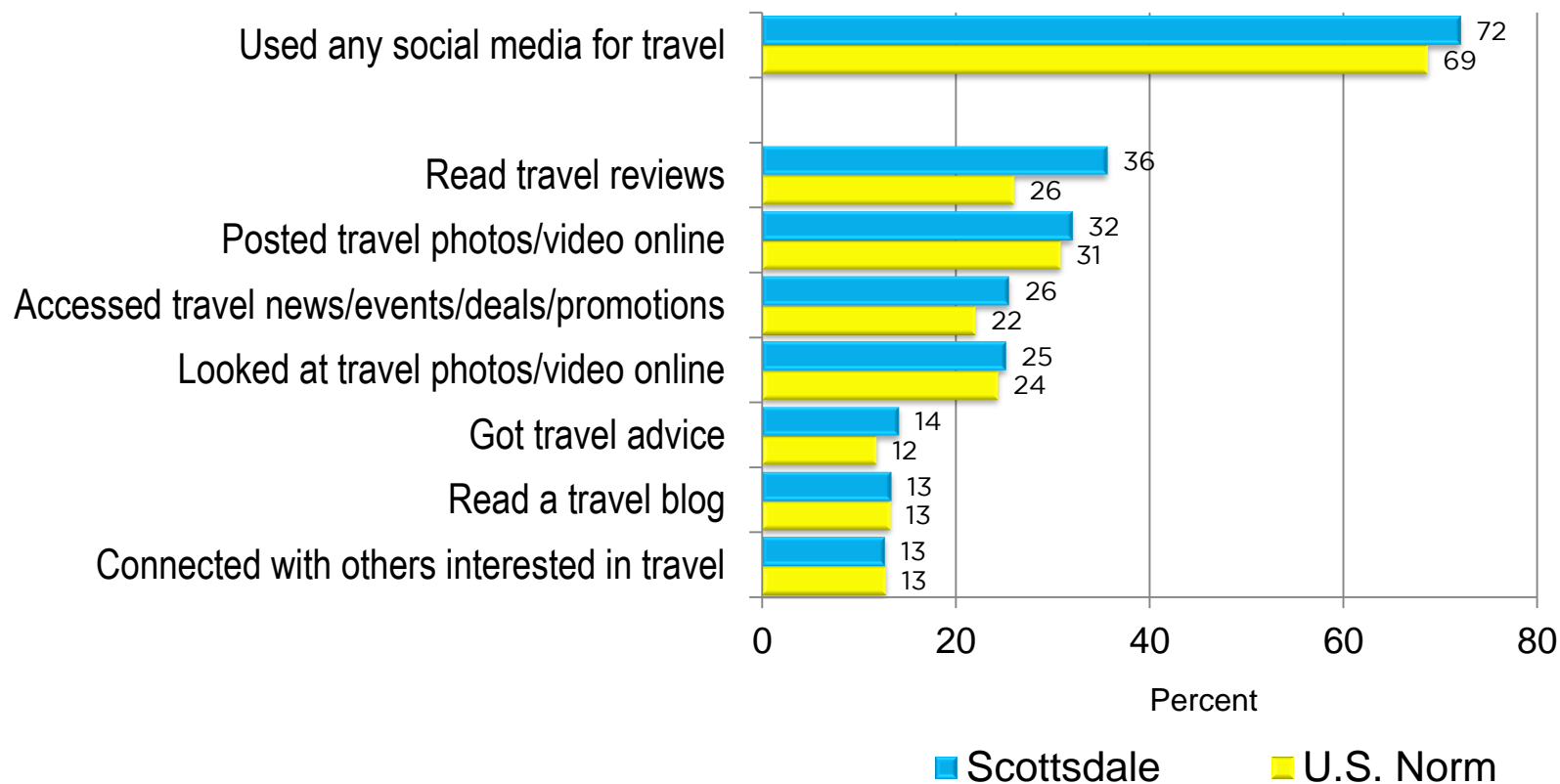


Activities of Special Interest

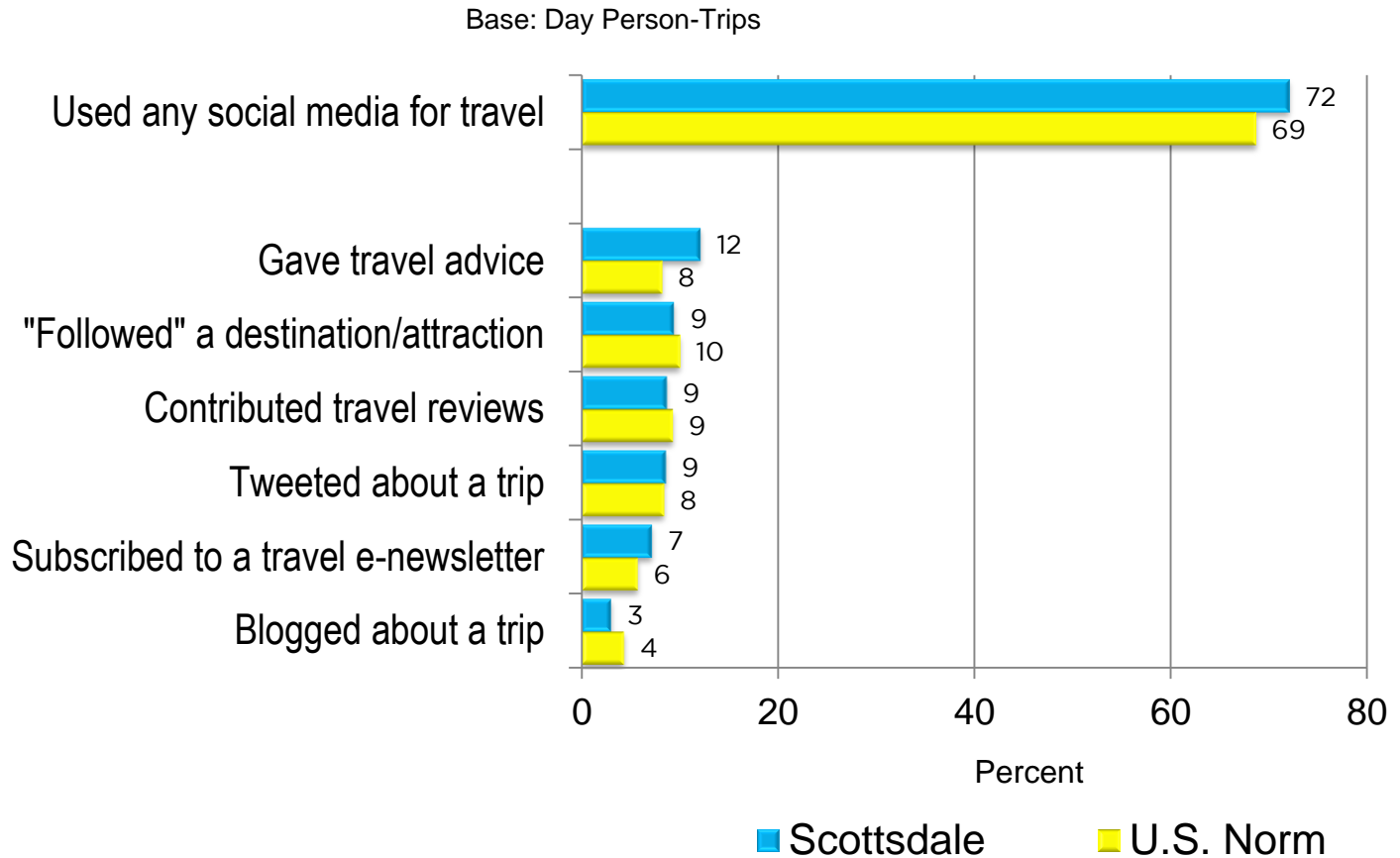


Online Social Media Use by Travelers

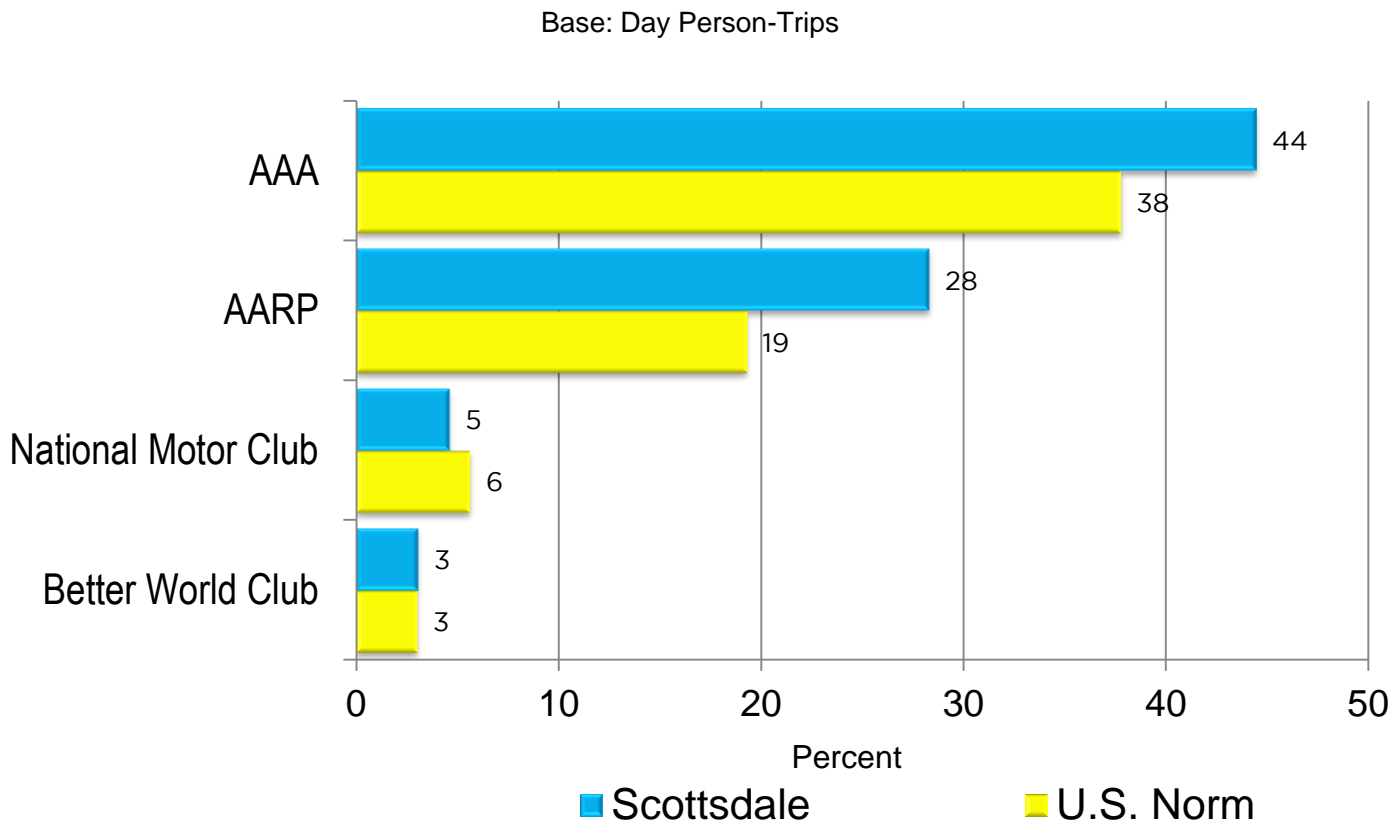
Base: Day Person-Trips



Online Social Media Use by Travelers



Organization Membership

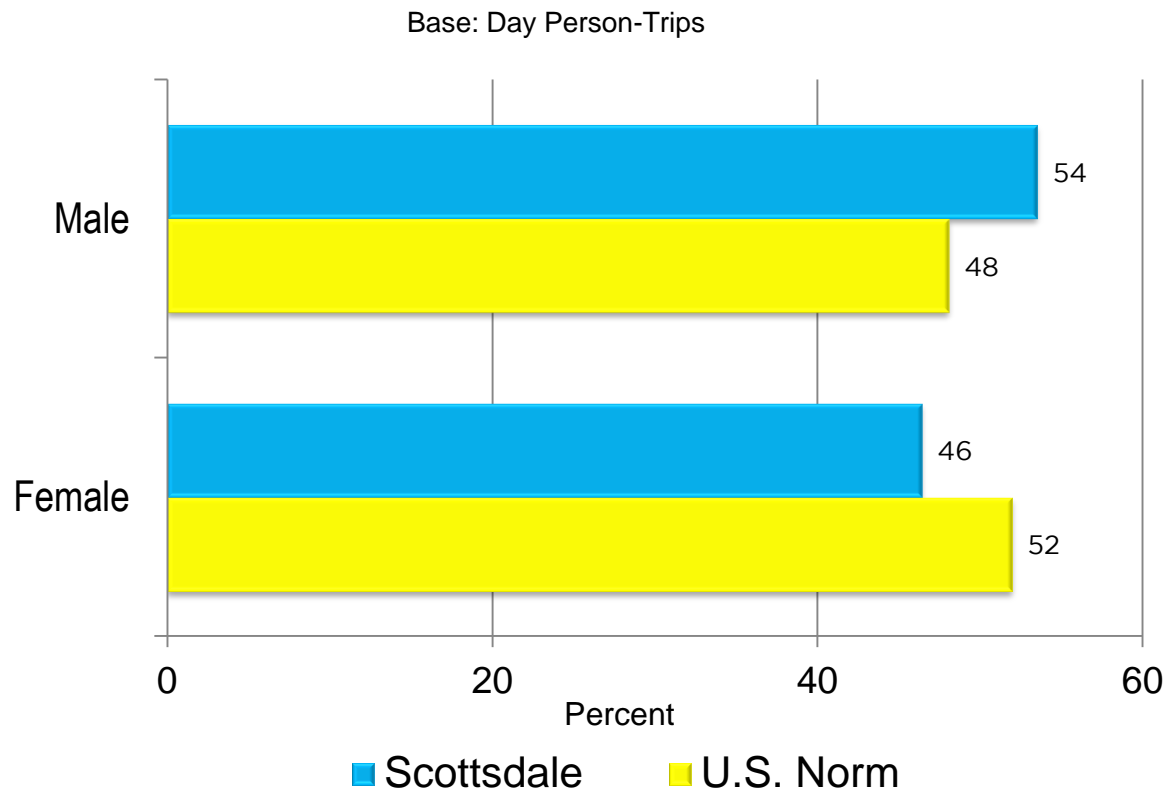




Demographic Profile of Day Visitors



Gender

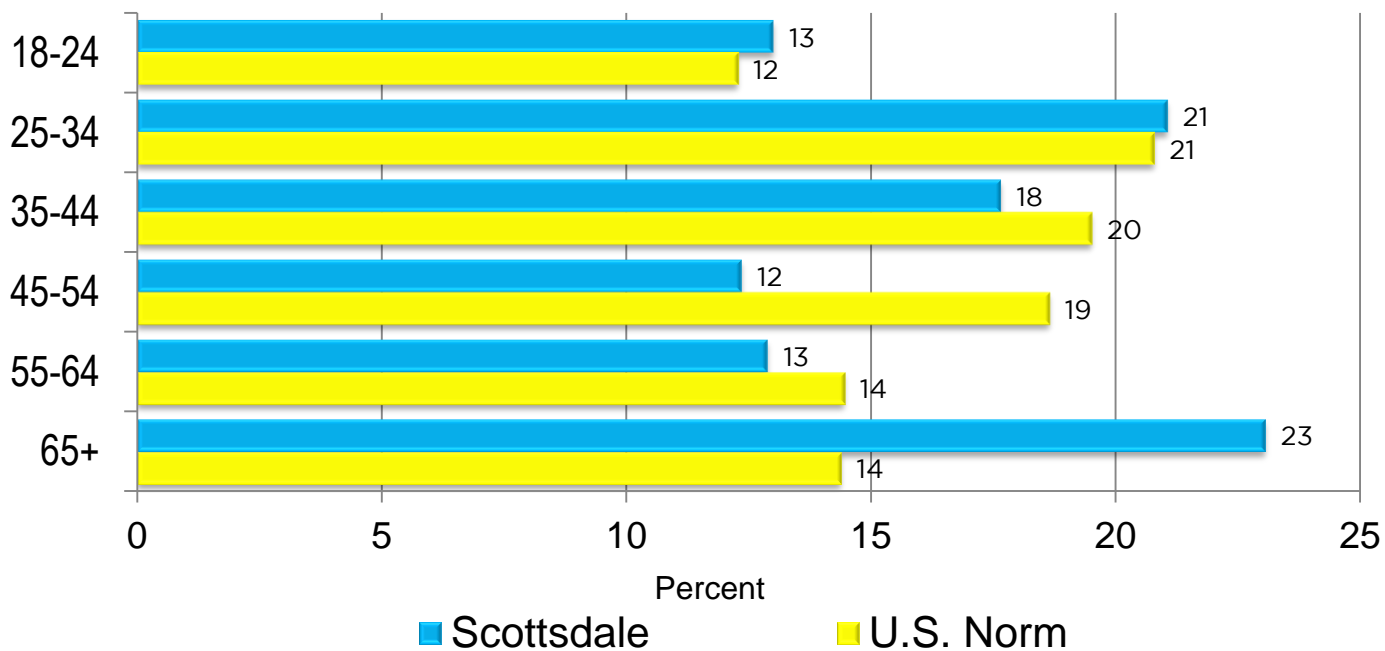


Age

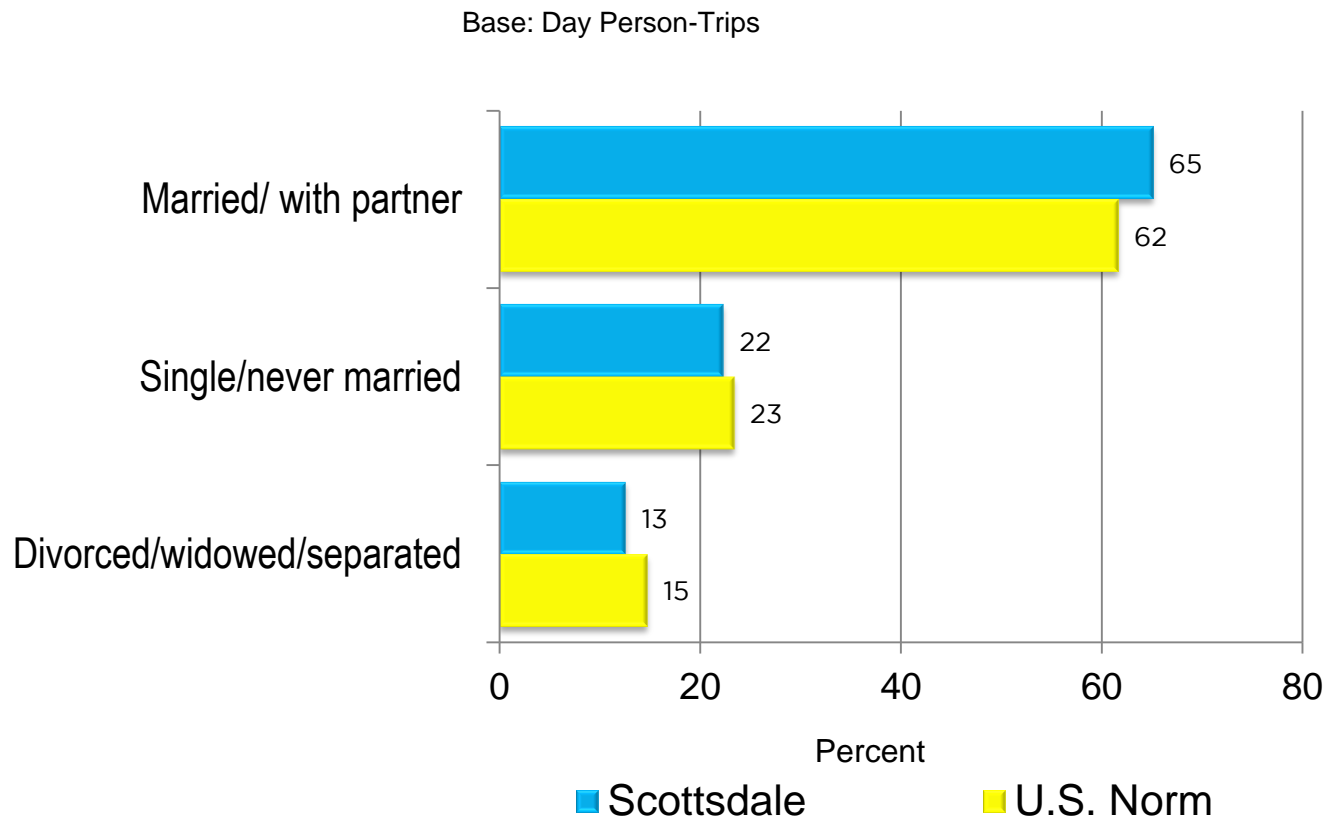
Base: Day Person-Trips

Average Scottsdale = 46.2

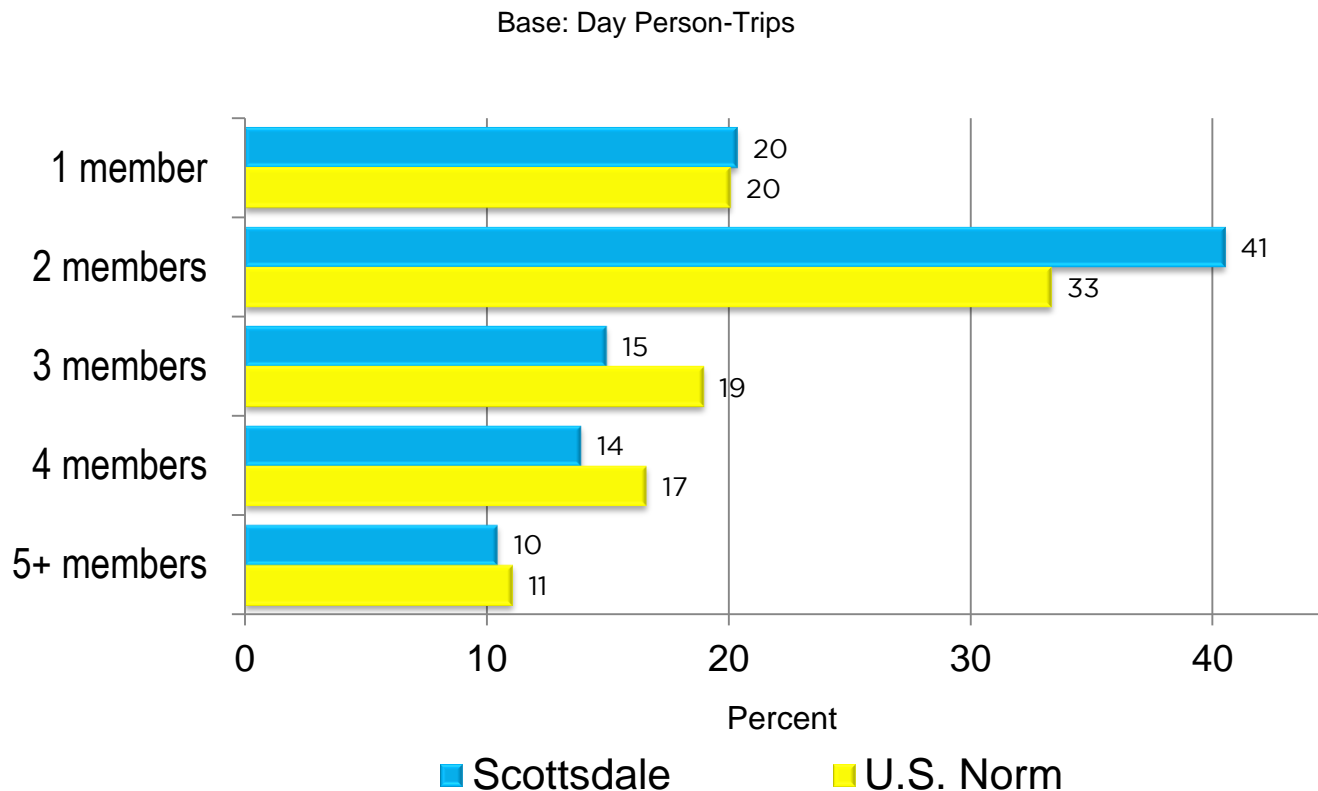
Average U.S. Norm = 44.7



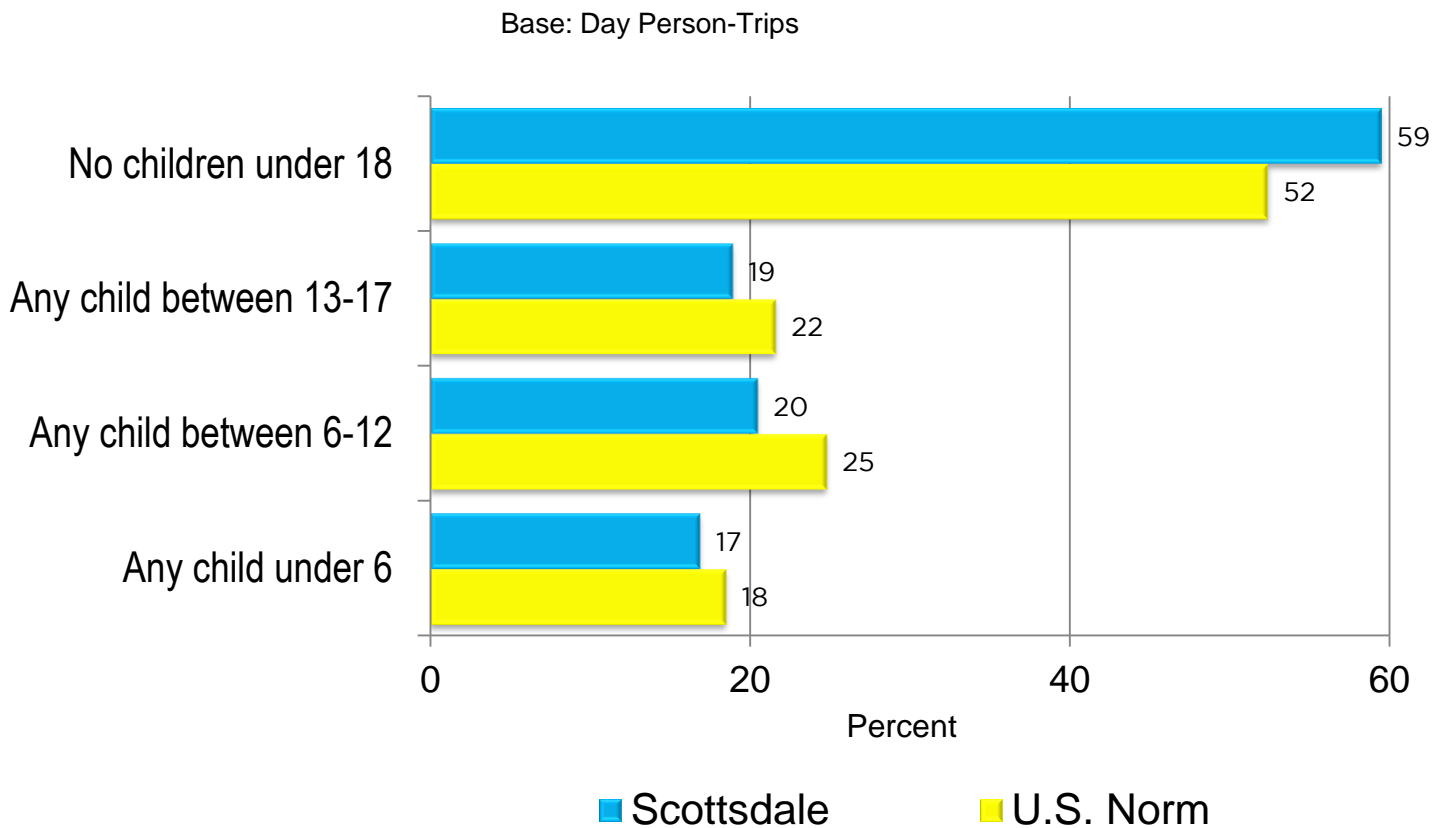
Marital Status



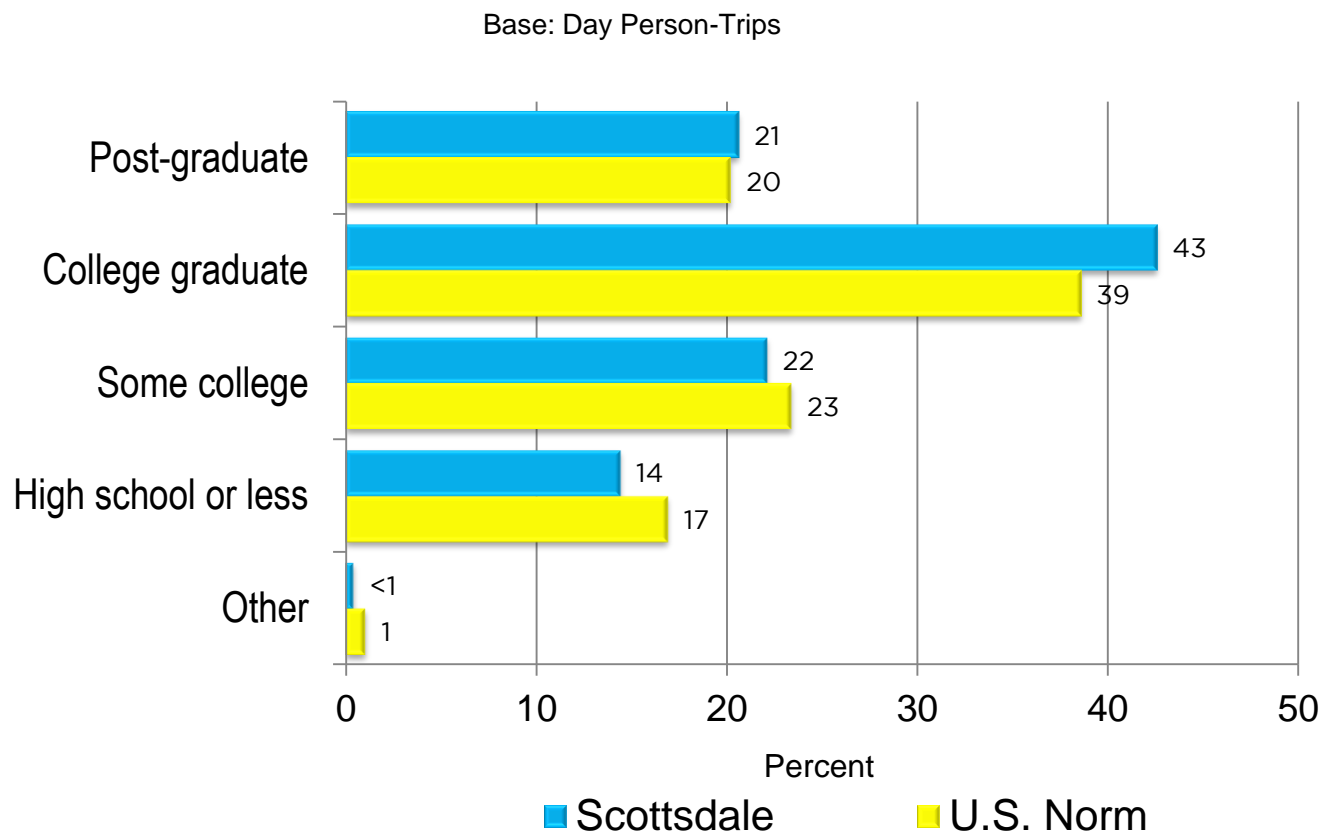
Household Size



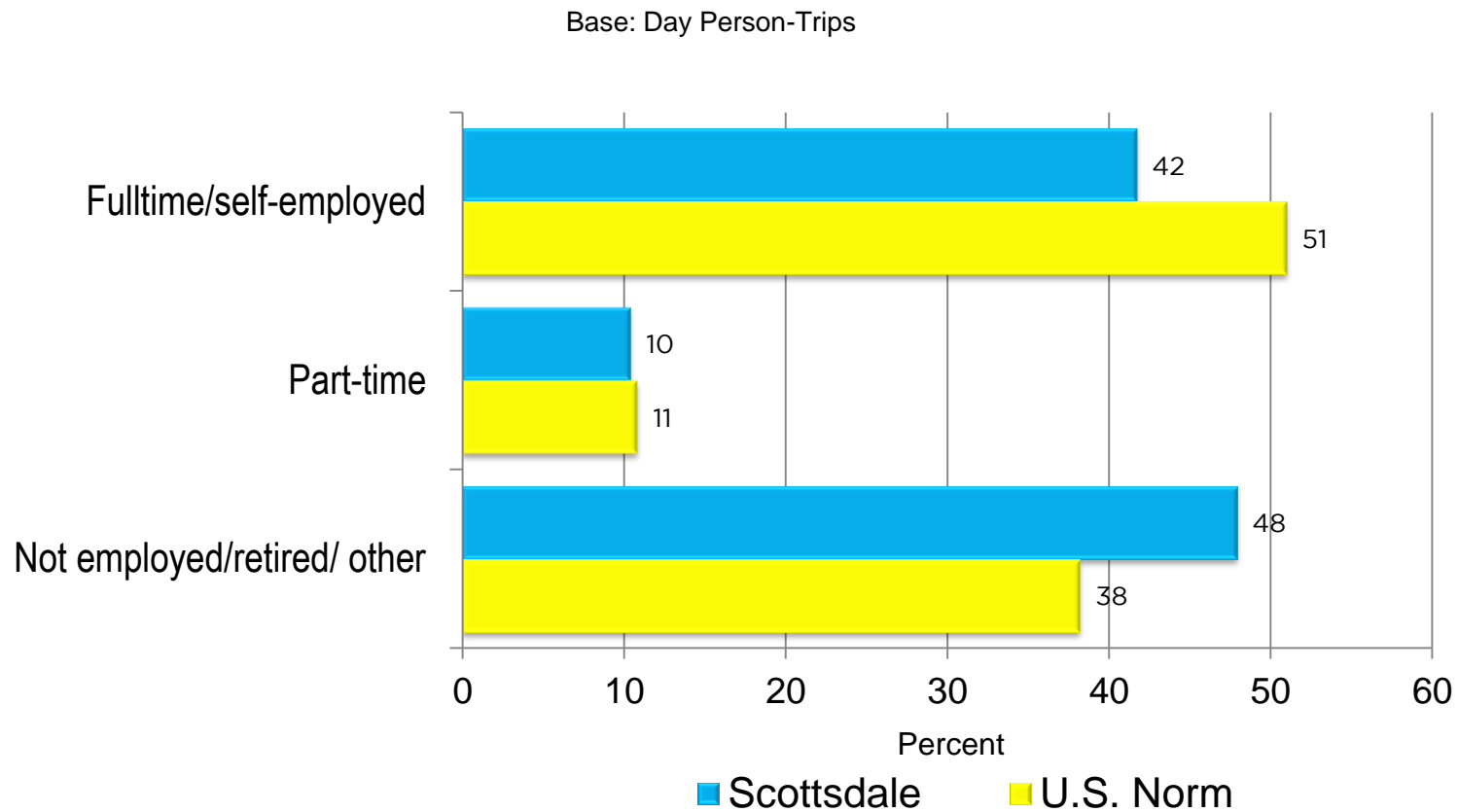
Children in Household



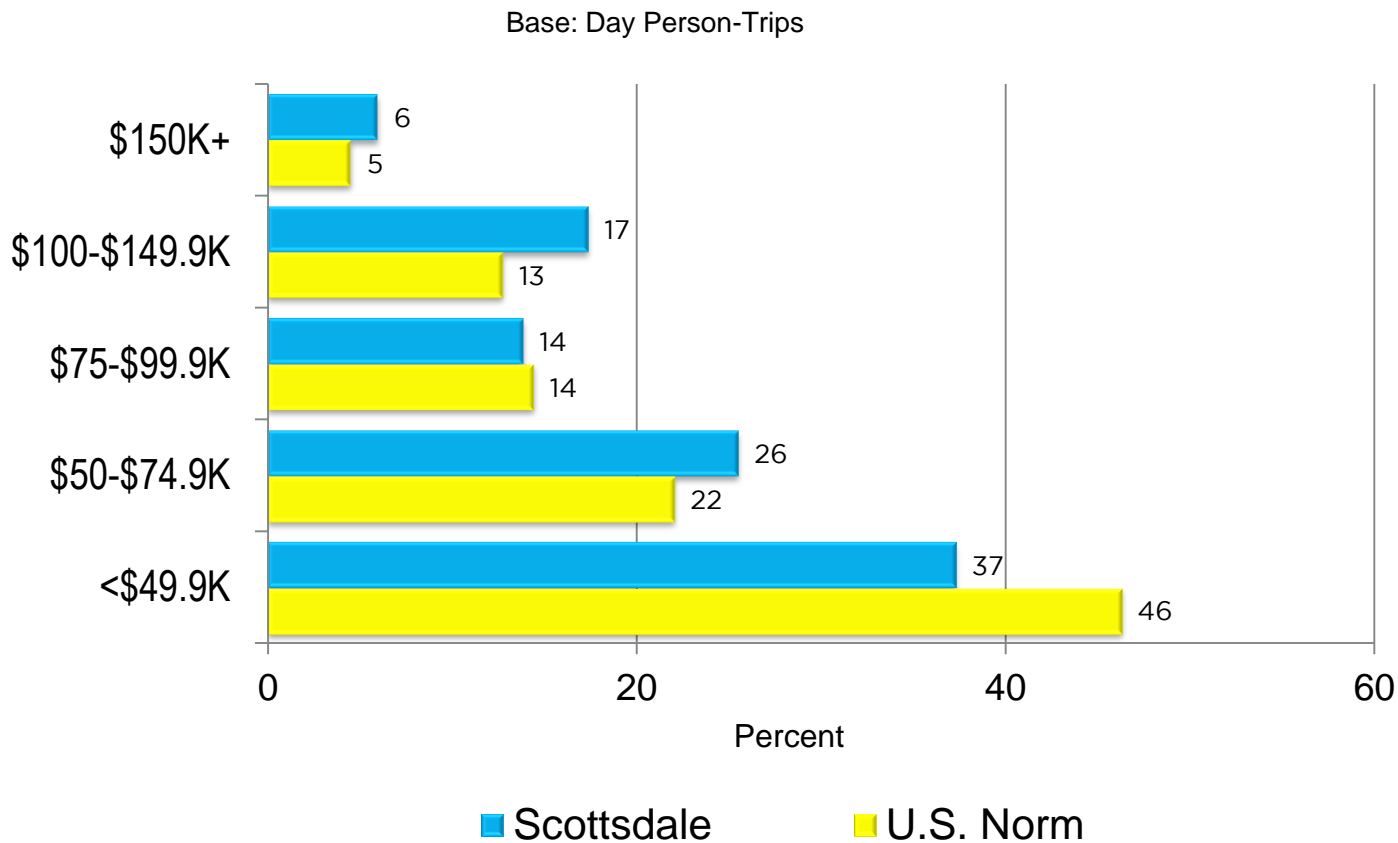
Education



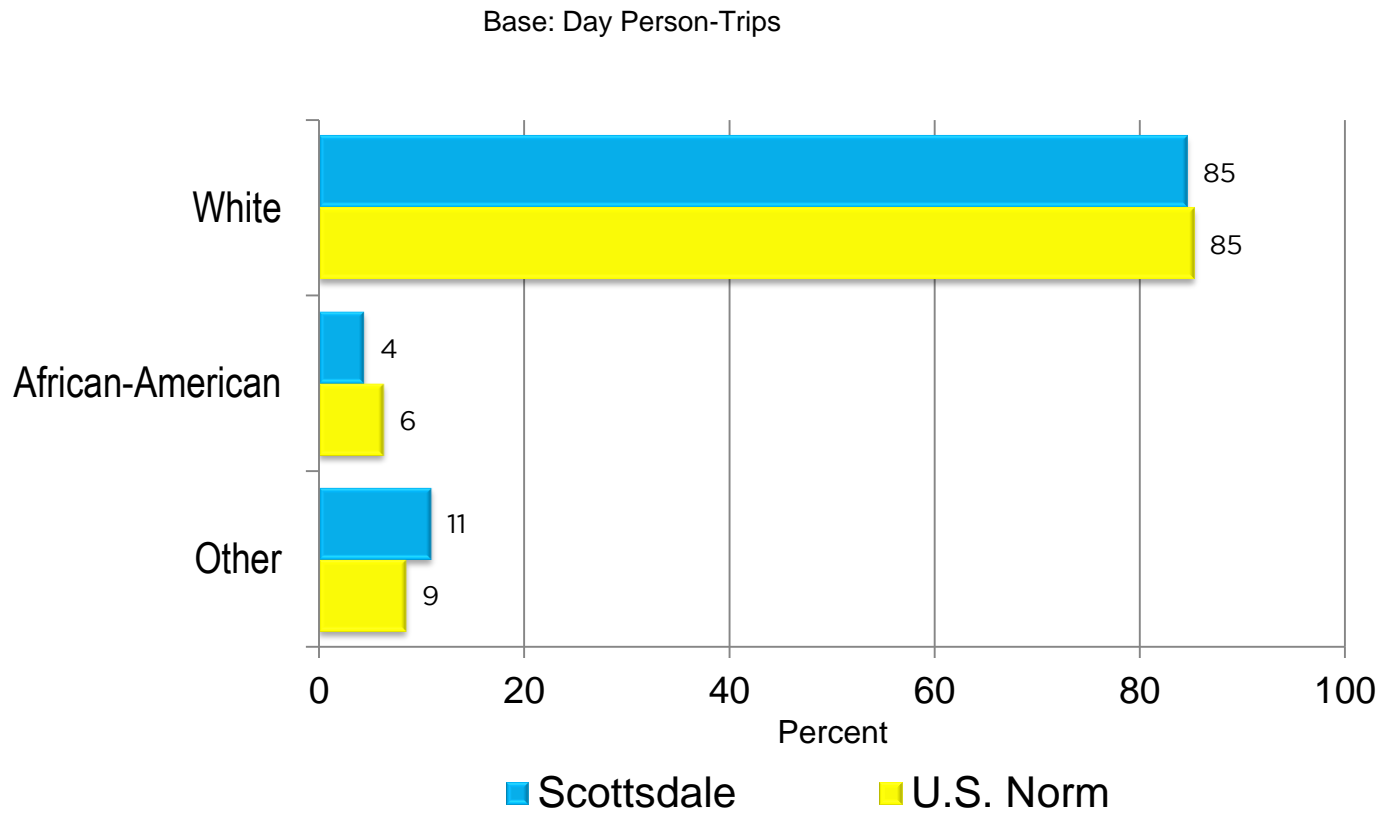
Employment



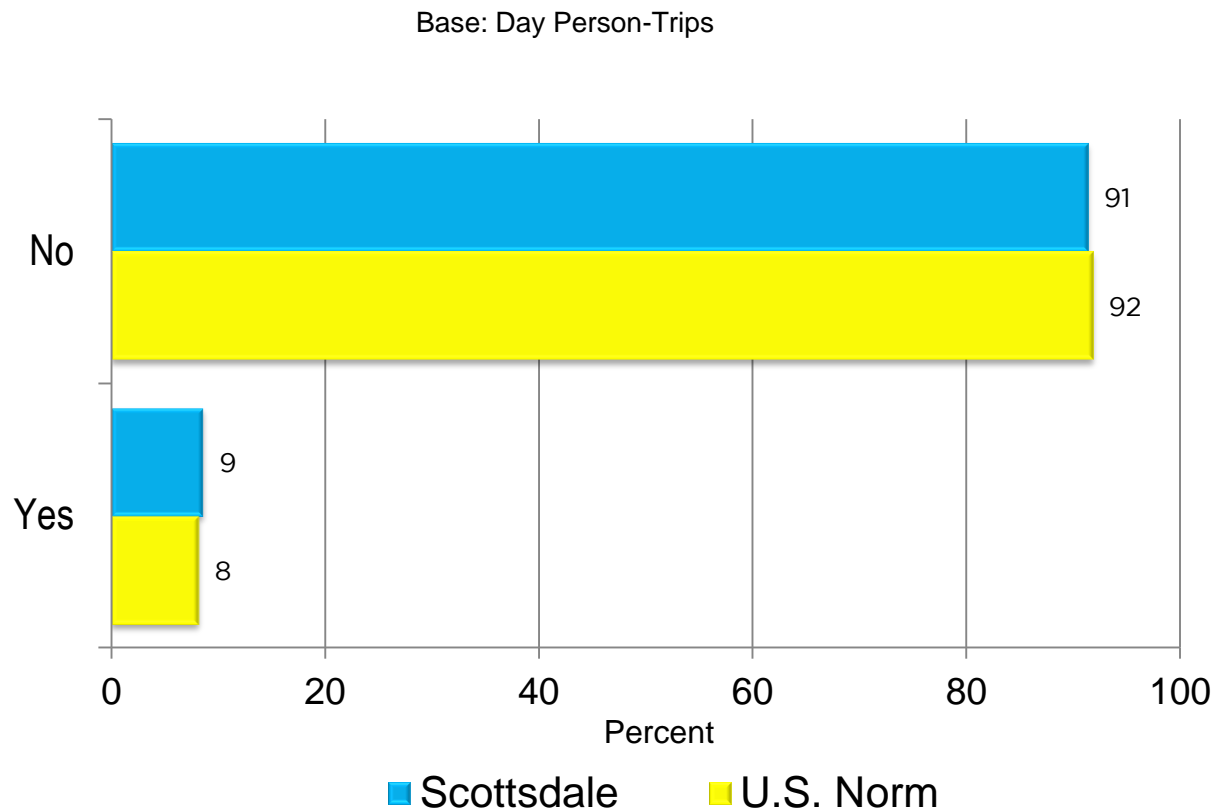
Household Income



Race



Hispanic Background





Appendix: 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:** Include 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:**
 - 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:

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