COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

CITY OF SCOTTSDALE

2021

Longwoods Travel USA®

Base: 2021 Person-Trips

Introduction

- 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.
- 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.
- This report provides an overview for Scottsdale's domestic tourism business in 2021.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Scottsdale, the following sample was achieved in 2021:

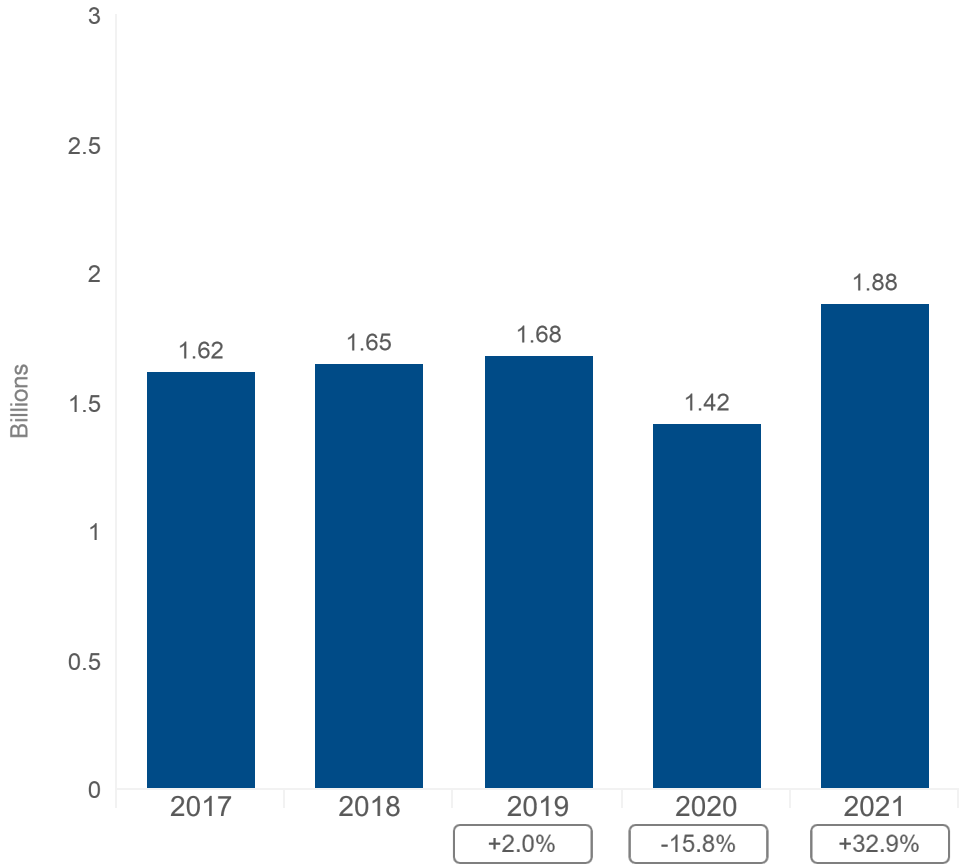
Overnight Base Size	Day Base Size
950	*198*

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Size and Structure of the U.S. Travel Market

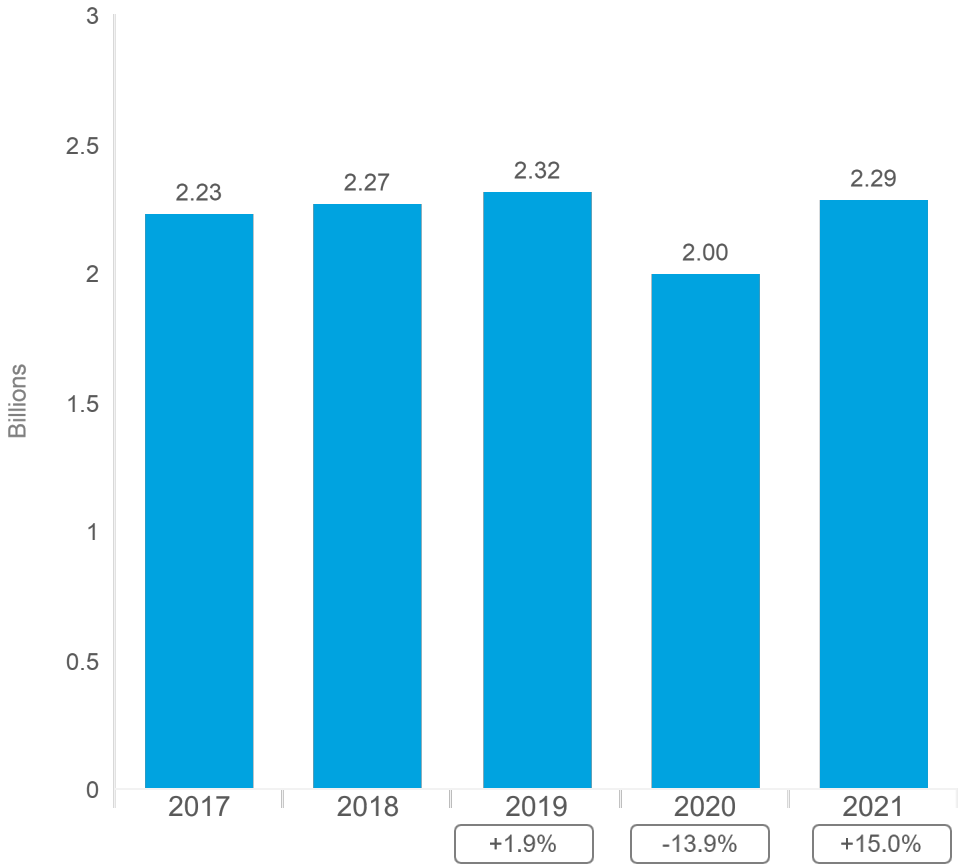
Base: 2021 Person-Trips

Total Size of U.S. Overnight Travel Market



*West Region: Up 38.2% from 2020

Total Size of U.S. Day Travel Market



*West Region: Up 24.4% from 2020

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Size of the Scottsdale Travel Market

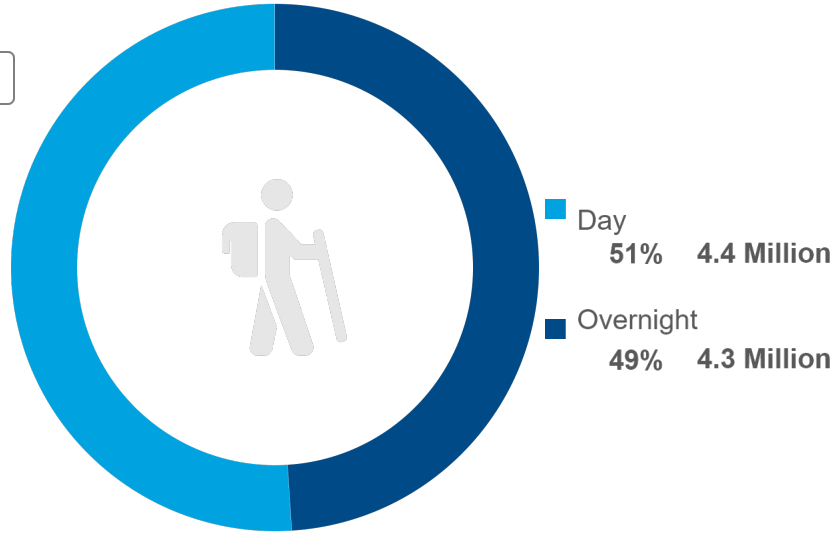
Base: 2021 Person-Trips

Total Size of Scottsdale 2021 Domestic Travel Market

Total Person-Trips

8.7 Million

+19.3% vs. last year

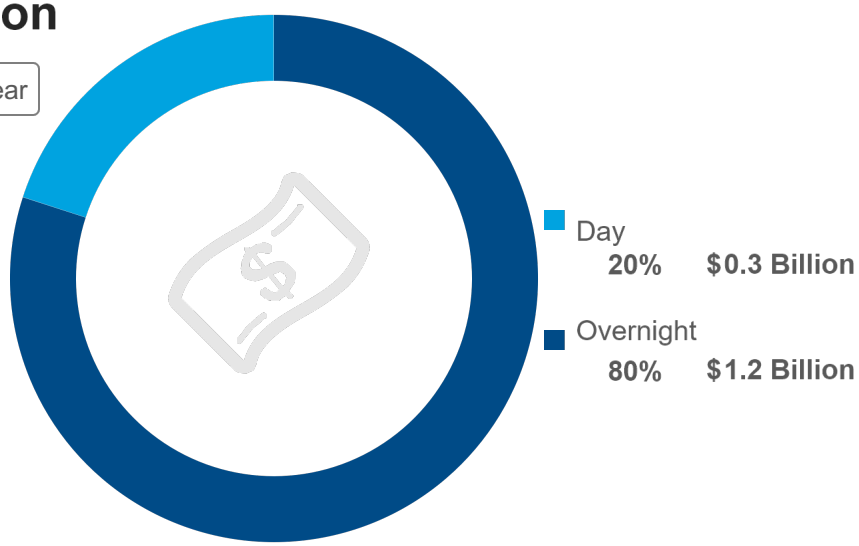


Total Expenditures for Scottsdale 2021 Domestic Travel Market

Total Spending

$ 1.5 Billion

+30.2% vs. last year



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Travel USA Visitor Profile

Overnight Visitation

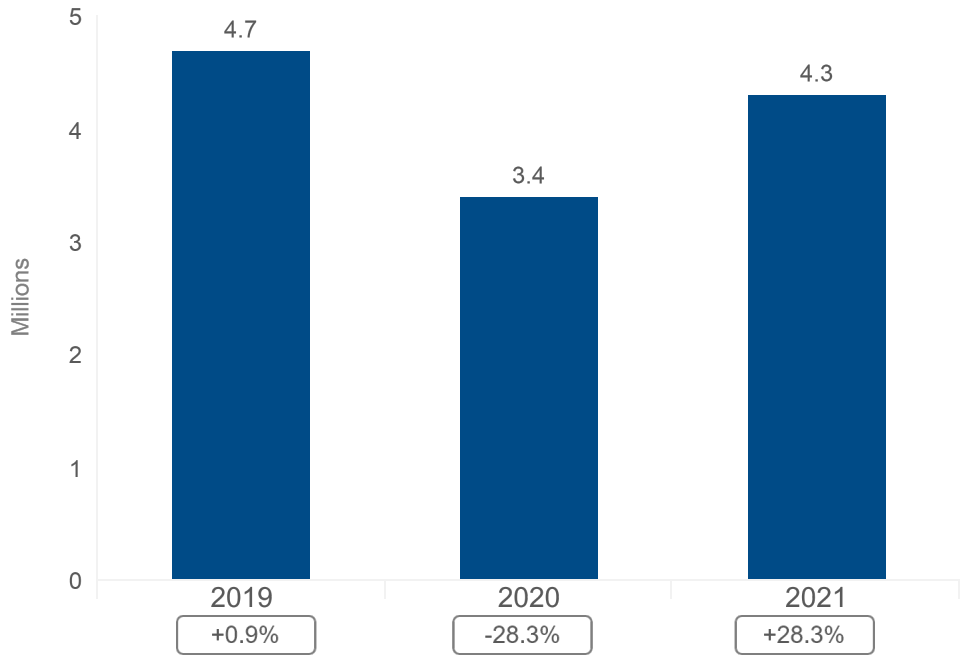
CITY OF SCOTTSDALE

2021

Size and Structure of Scottsdale's Domestic Travel Market

Base: 2021 Overnight Person-Trips

Overnight Trips to Scottsdale



Past Visitation to Scottsdale

76% of overnight travelers to Scottsdale are repeat visitors

55% of overnight travelers to Scottsdale had visited before in the past 12 months

Scottsdale's Overnight Trip Expenditures

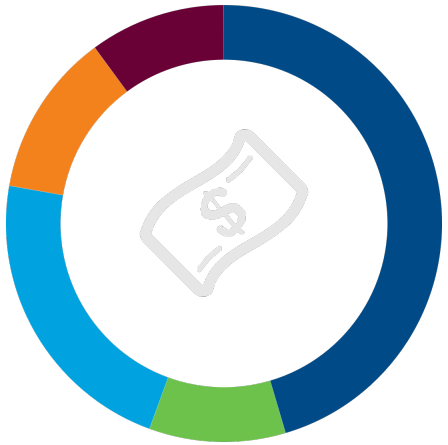
Base: 2021 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

$ 1.172 Billion

+35.8% vs. last year

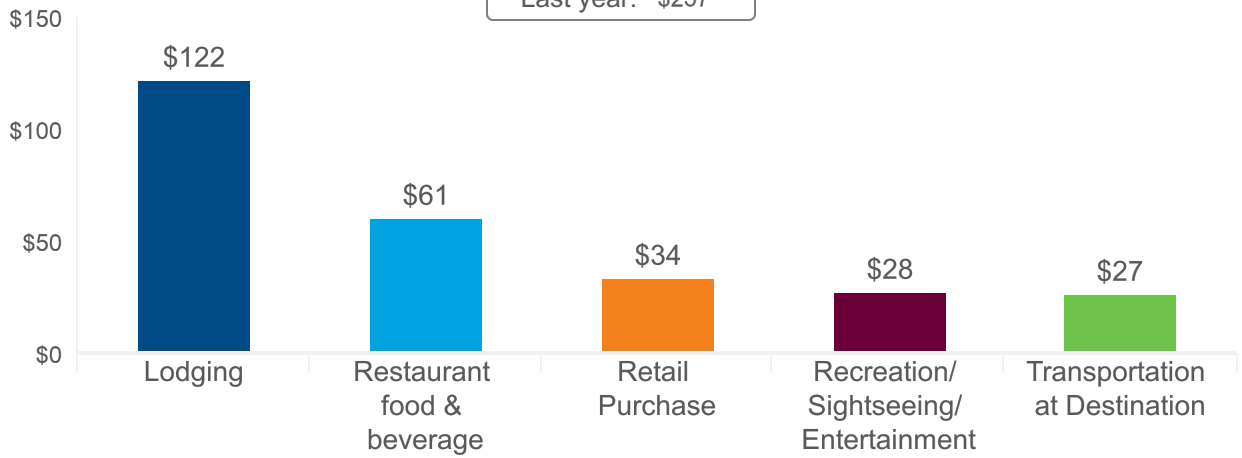


			vs. last year
Lodging	45%	$526 Million	+45.2%
Transportation at Destination	10%	$117 Million	+36.5%
Restaurant Food & Beverage	22%	$264 Million	+34.0%
Retail Purchase	12%	$145 Million	+11.8%
Recreation/Entertainment	10%	$120 Million	+36.2%

Average Per Person Expenditures on Domestic Overnight Trips - by Sector

Average Per Person: $ 272

Last year: $257



Average Per Person:

Leisure $264

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Scottsdale's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

Main Purpose of Trip

33% Visiting friends/ relatives

13% Touring

13% Outdoors

9% City trip

9% Special event

4% Resort

4% Casino

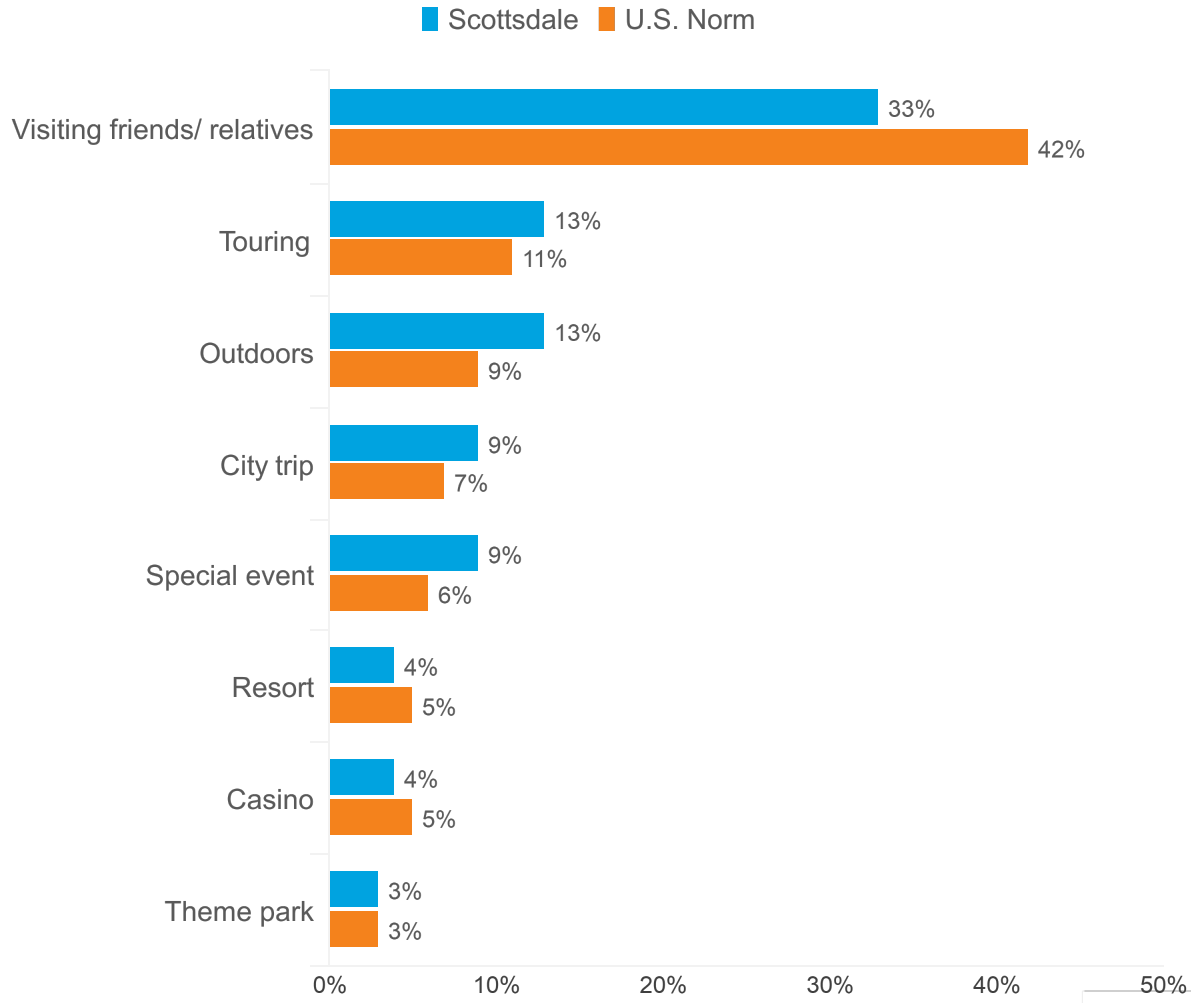
3% Theme park

2% Conference/ Convention

3% Other business trip

2% Business-Leisure

Main Purpose of Leisure Trip



Structure of the U.S. and Scottsdale Overnight Travel Market

Base: 2021 Overnight Person-Trips

2021 U.S. Overnight Trips

Visiting friends/relatives	42%
Marketable	48%
Business	6%
Business-leisure	4%

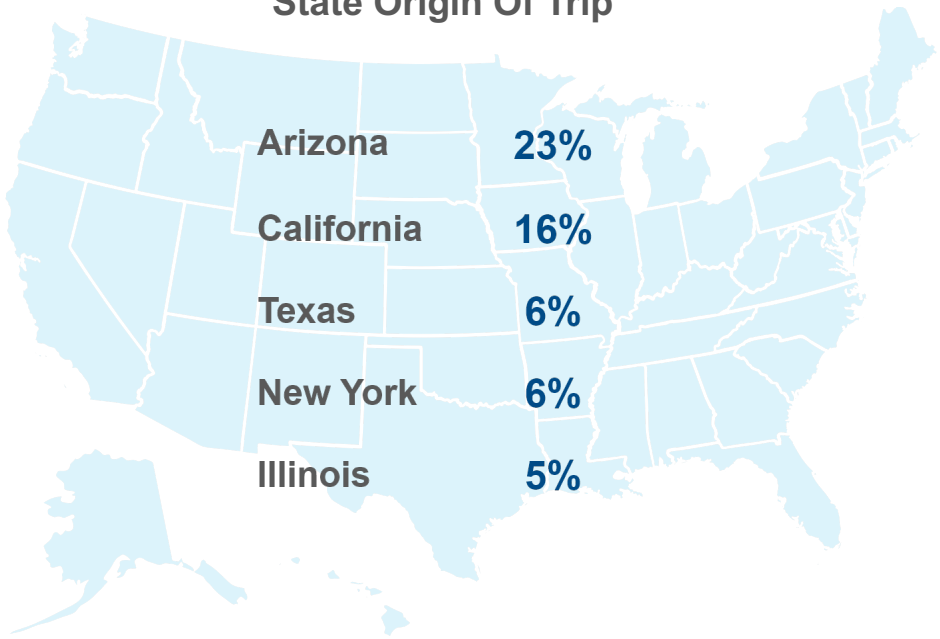
2021 Scottsdale Overnight Trips

Visiting friends/relatives	33%
Marketable	59%
Business	6%
Business-leisure	2%

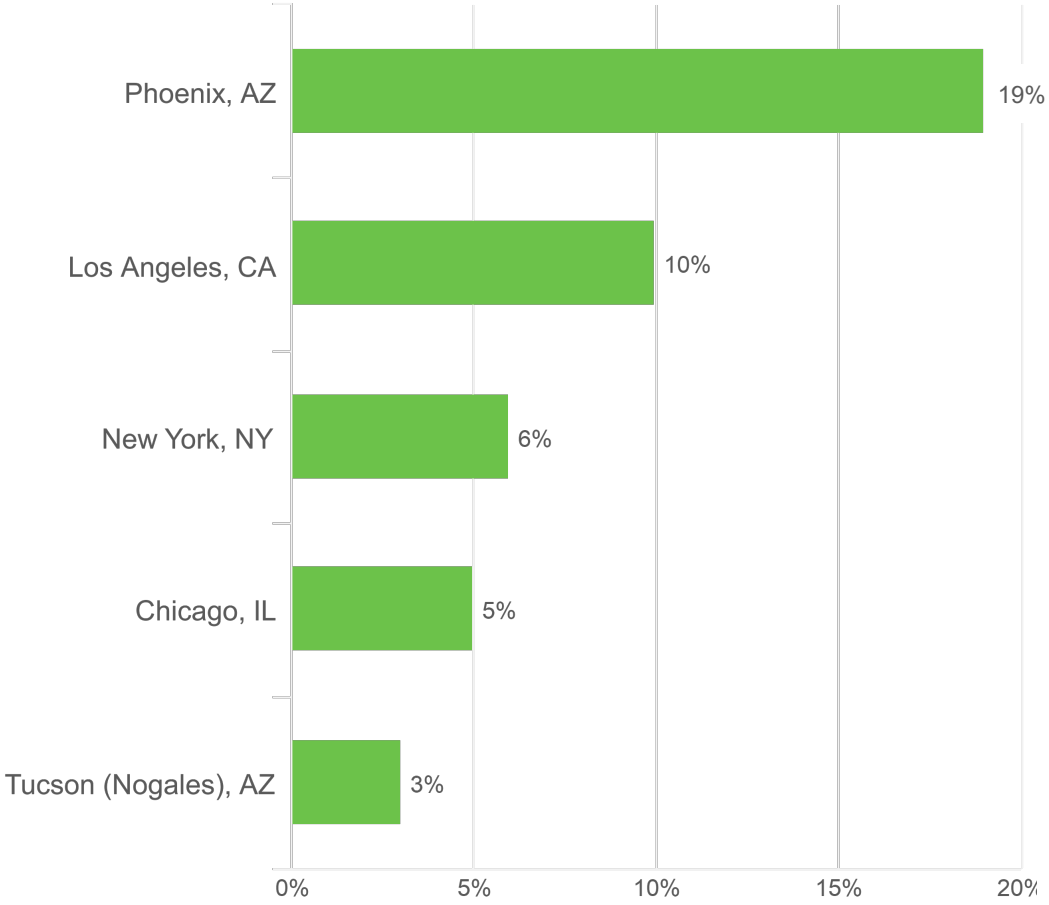
Scottsdale's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

State Origin Of Trip



DMA Origin Of Trip



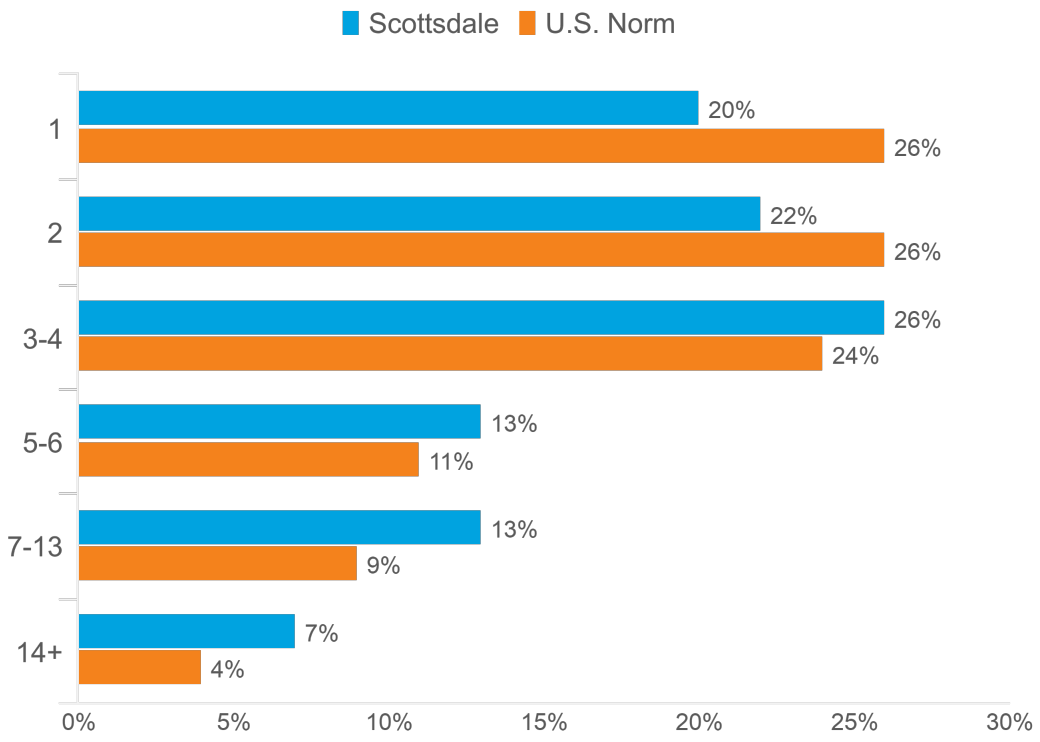
Season of Trip

Total Overnight Person-Trips

Scottsdale's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

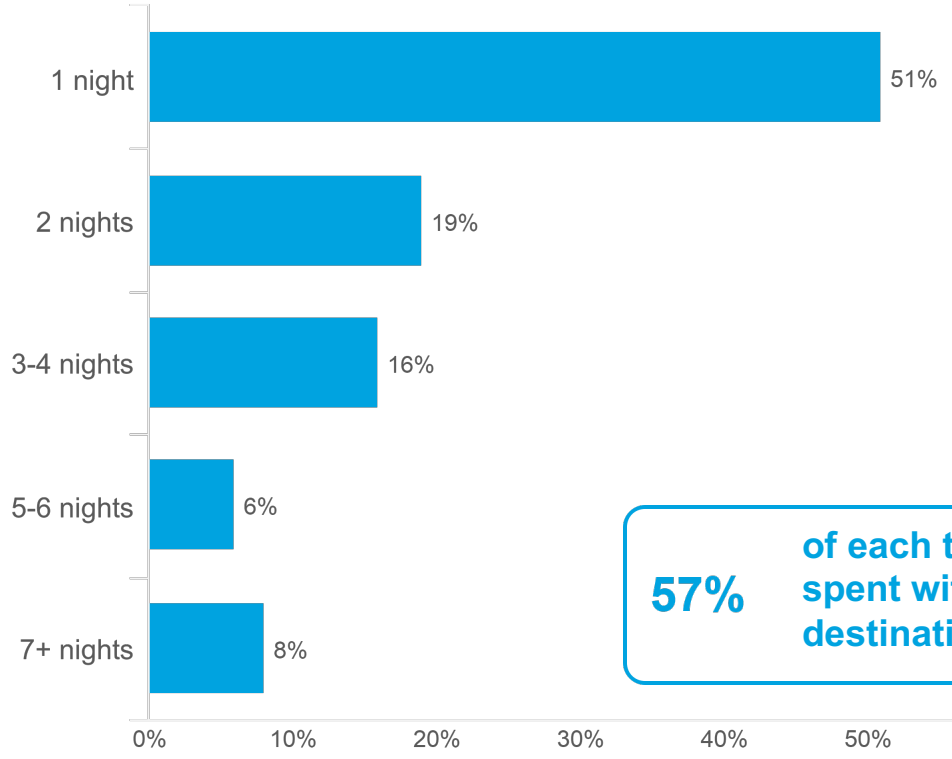
Total Nights Away on Trip



Scottsdale
4.9
Average Nights

U.S. Norm
3.9
Average Nights

Nights Spent in Scottsdale



57% of each trip was spent within the destination

Average number of nights
2.8

Average last year
3.3

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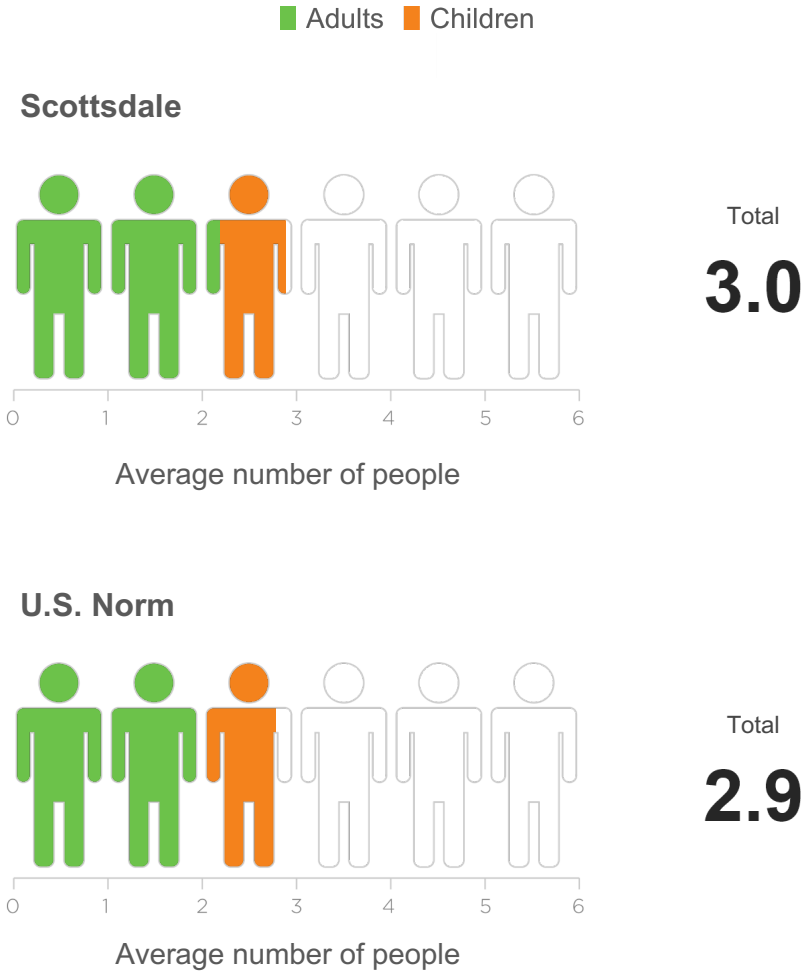
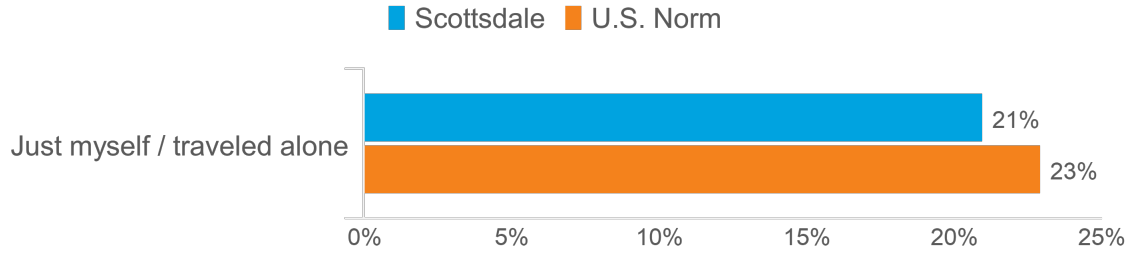
Scottsdale's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

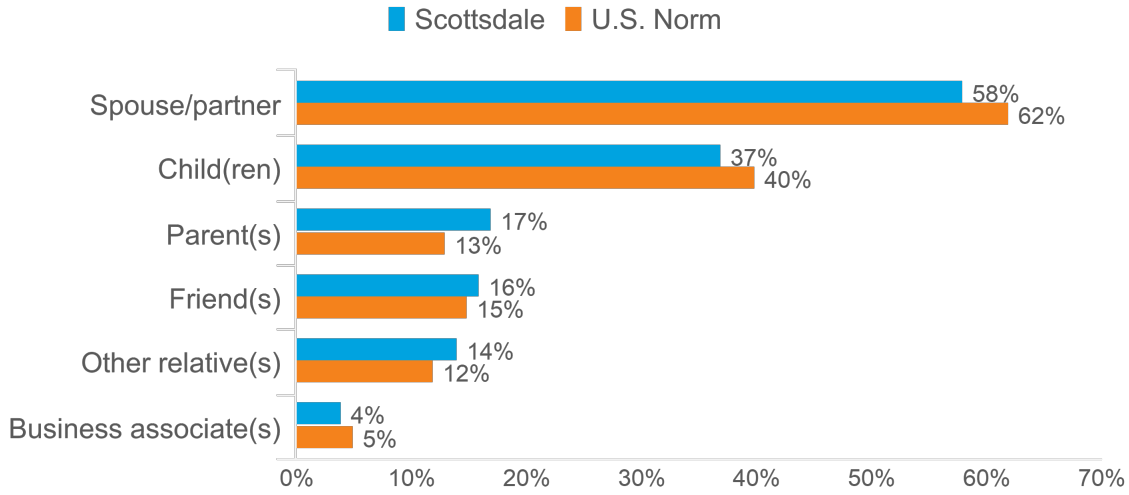
Size of Travel Party



Percent Who Traveled Alone



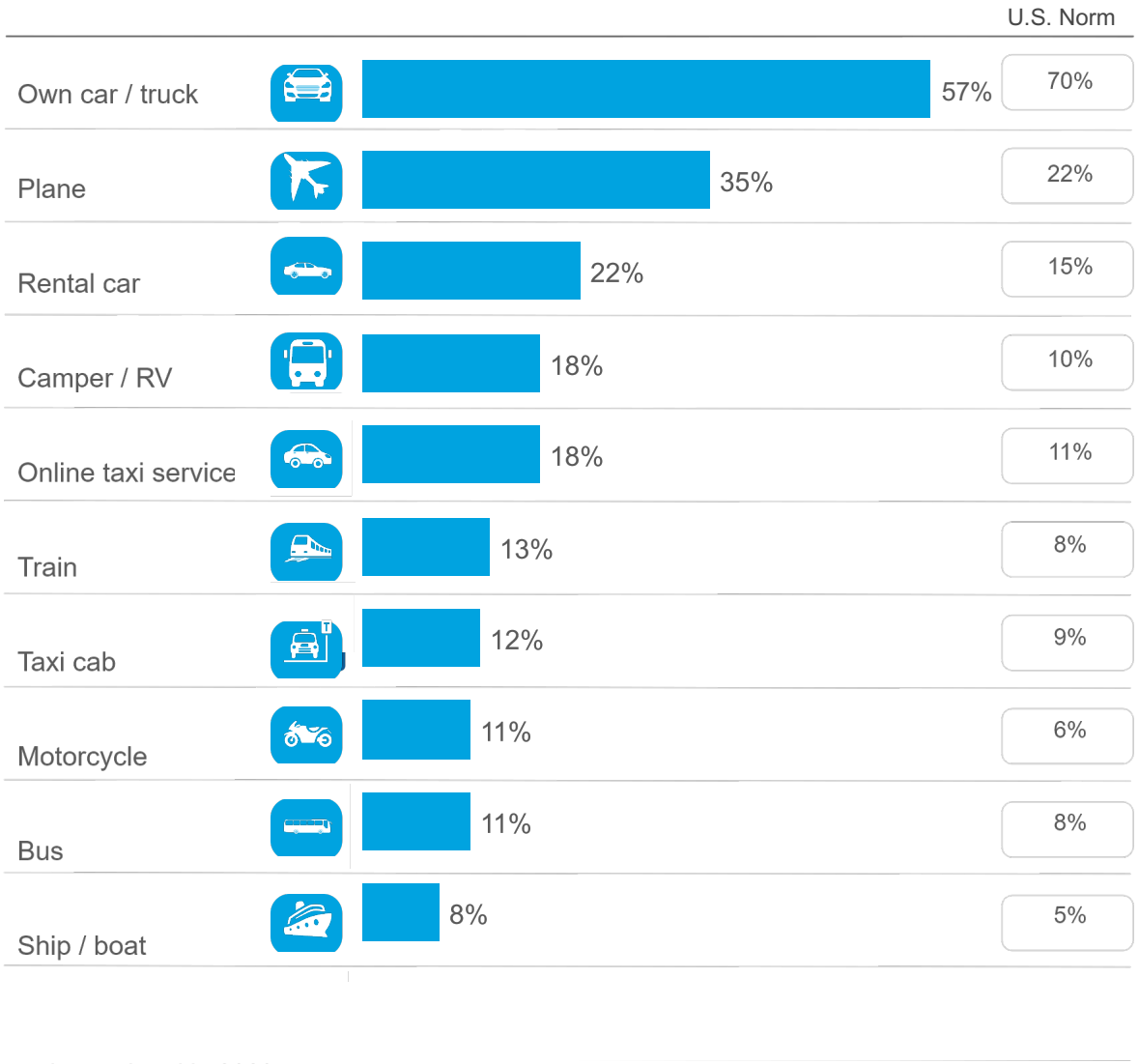
Composition of Immediate Travel Party



Scottsdale's Overnight Trip Characteristics

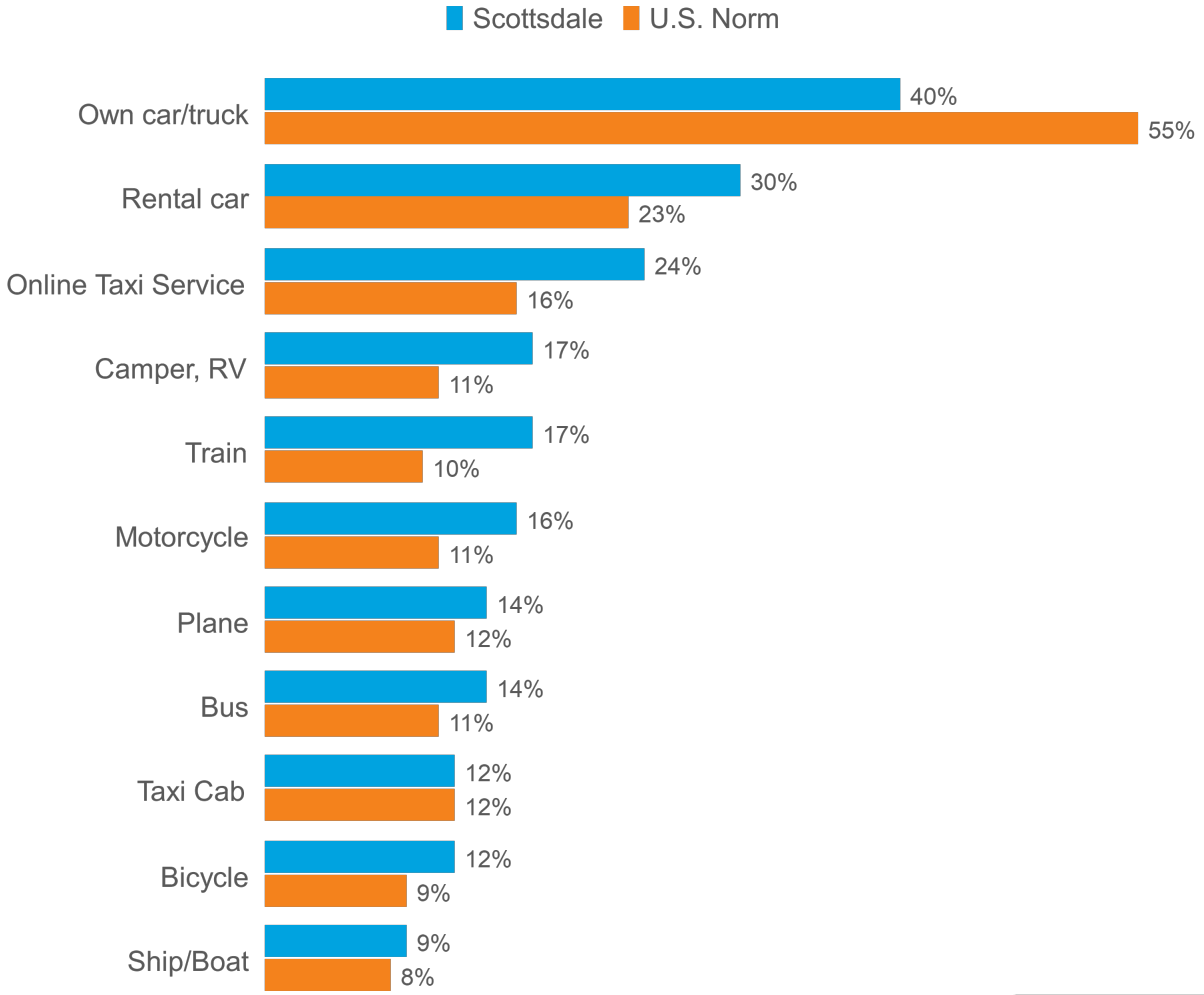
Base: 2021 Overnight Person-Trips

Transportation Used to get to Destination



Question updated in 2020

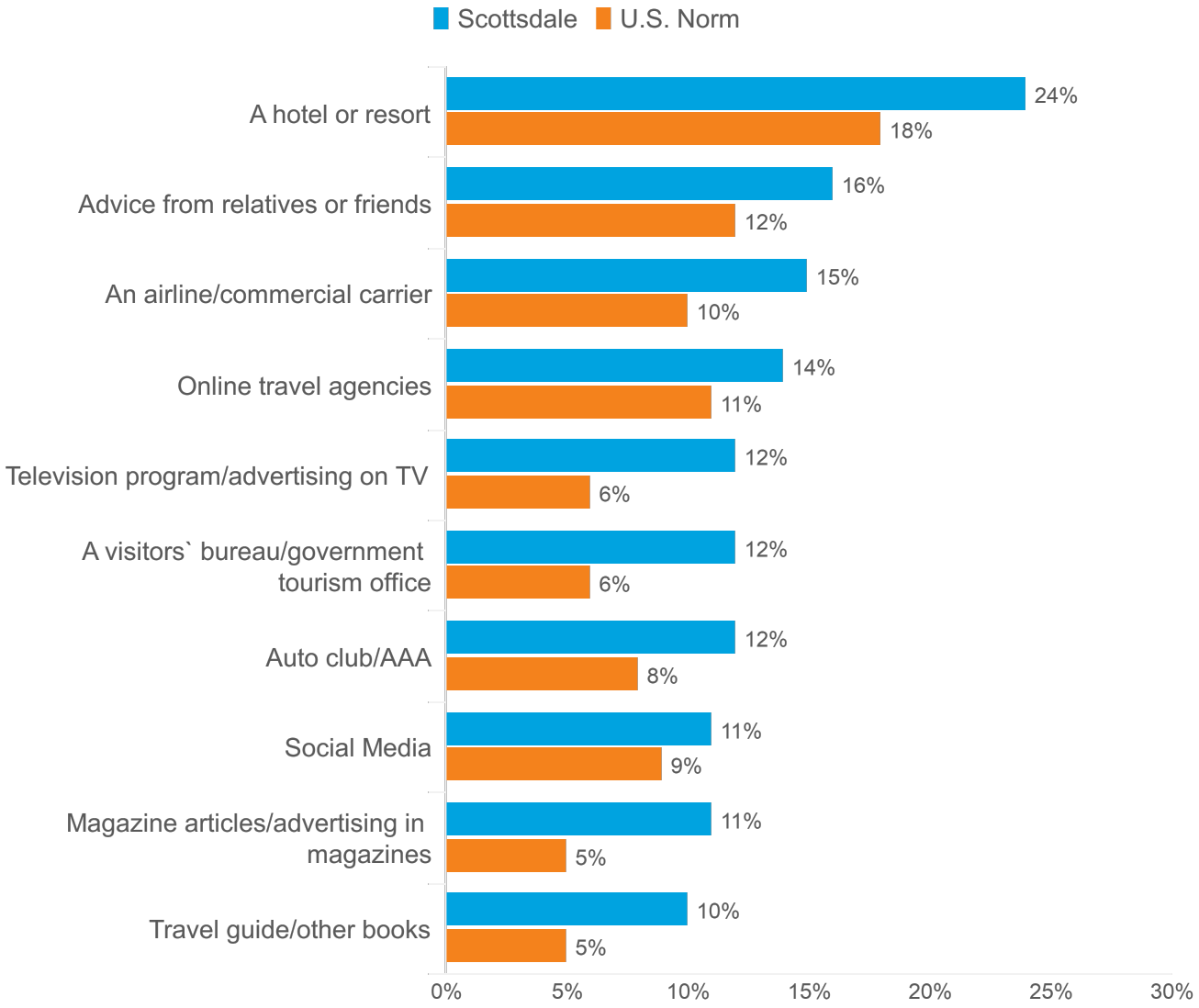
Transportation Used within Destination



Scottsdale: Pre-Trip

Base: 2021 Overnight Person-Trips

Trip Planning Information Sources



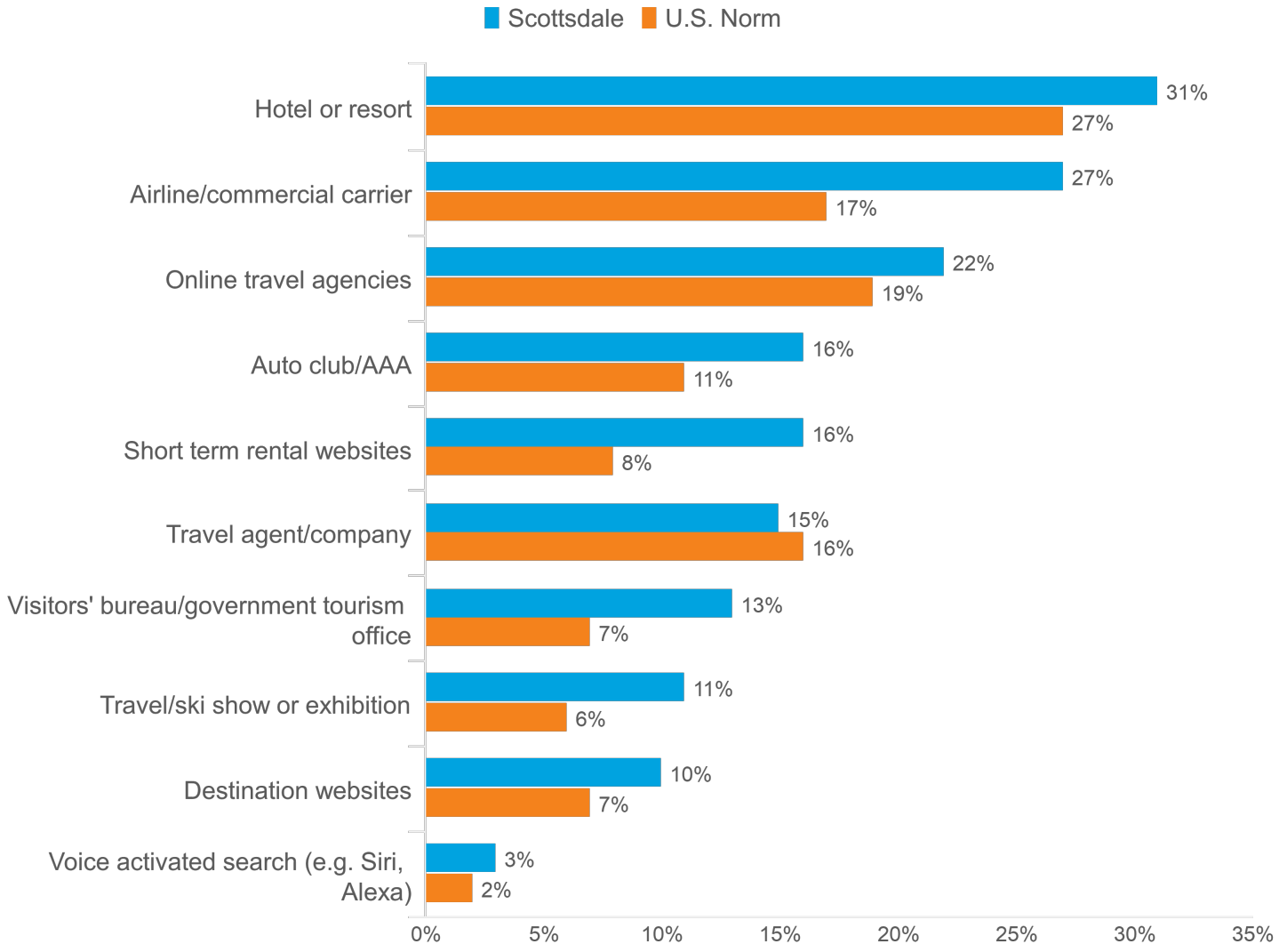
Length of Trip Planning

	Scottsdale	U.S. Norm
1 month or less	**26%**	**30%**
2 months	**22%**	**15%**
3-5 months	**23%**	**18%**
6-12 months	**16%**	**14%**
More than 1 year in advance	**4%**	**6%**
Did not plan anything in advance	**8%**	**17%**

Scottsdale's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

Method of Booking



Accommodations

	Scottsdale	U.S. Norm
Hotel	**37%**	**38%**
Motel	**17%**	**13%**
Resort hotel	**16%**	**12%**
Time share	**15%**	**5%**
Home of friends / relatives	**13%**	**19%**
Bed & breakfast	**13%**	**8%**
Rented home / condo / apartment	**11%**	**6%**

Scottsdale: During Trip

Base: 2021 Overnight Person-Trips

Activity Groupings

Outdoor Activities

63%

U.S. Norm: 48%

Entertainment Activities

64%

U.S. Norm: 55%

Cultural Activities

39%

U.S. Norm: 29%

Sporting Activities

35%

U.S. Norm: 24%

Business Activities

26%

U.S. Norm: 18%

Activities and Experiences (Top 10)

	Scottsdale	U.S. Norm
Shopping	27%	22%
Sightseeing	19%	16%
Hiking/backpacking	15%	7%
Swimming	14%	12%
Attending celebration	14%	13%
Bar/nightclub	13%	11%
Business meeting	13%	8%
Landmark/historic site	13%	11%
National/state park	12%	7%
Casino	12%	10%

Scottsdale: During Trip

Base: 2021 Overnight Person-Trips

Shopping Types on Trip

	Scottsdale	U.S. Norm
Outlet/mall shopping	**55%**	**47%**
Convenience/grocery shopping	**51%**	**42%**
Souvenir shopping	**34%**	**39%**
Big box stores (Walmart, Costco)	**32%**	**33%**
Boutique shopping	**27%**	**28%**
Antiquing	**13%**	**13%**

Base: 2021 Overnight Person-Trips that included Shopping

Dining Types on Trip

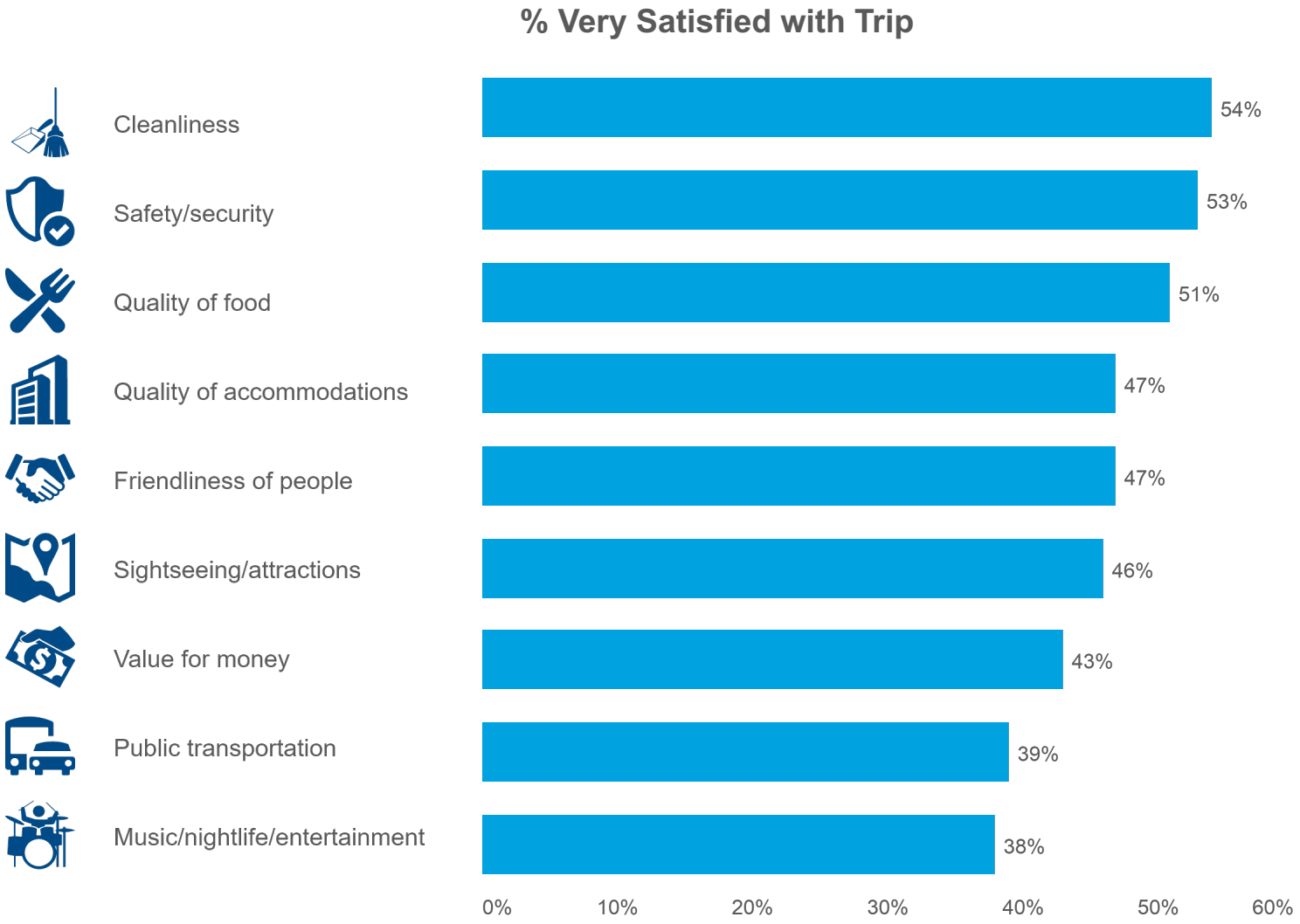
	Scottsdale	U.S. Norm
Unique/local food	**47%**	**40%**
Fine/upscale dining	**32%**	**22%**
Food delivery service (UberEATS, DoorDash, etc.)	**26%**	**21%**
Street food/food trucks	**26%**	**21%**
Picnicking	**19%**	**14%**
Gastropubs	**17%**	**10%**

Scottsdale: During Trip

Base: 2021 Overnight Person-Trips

59%

of overnight travelers were very satisfied with their overall trip experience

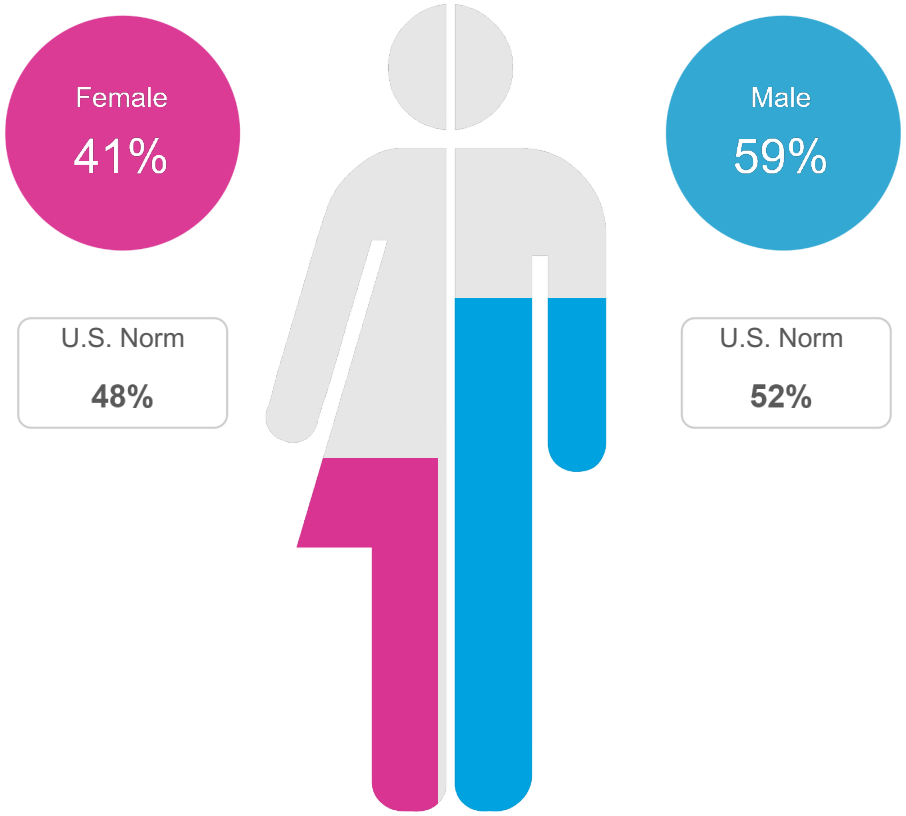


Question updated in 2020

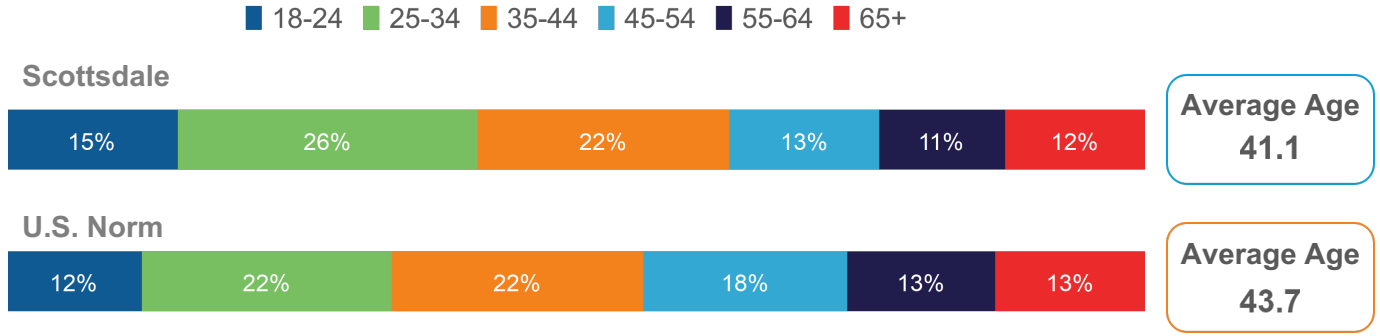
Demographic Profile of Overnight Scottsdale Visitors

Base: 2021 Overnight Person-Trips

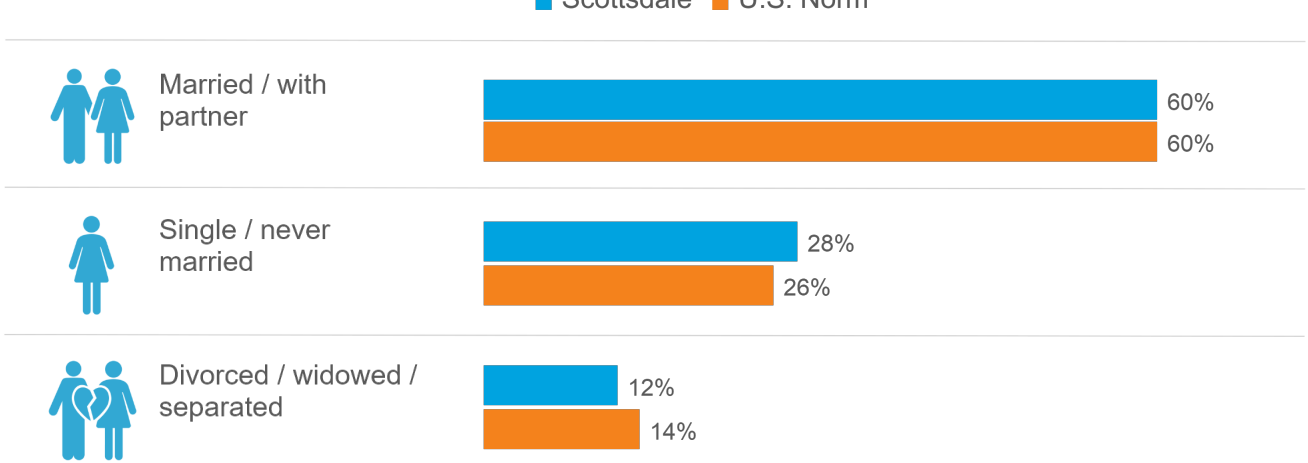
Gender



Age



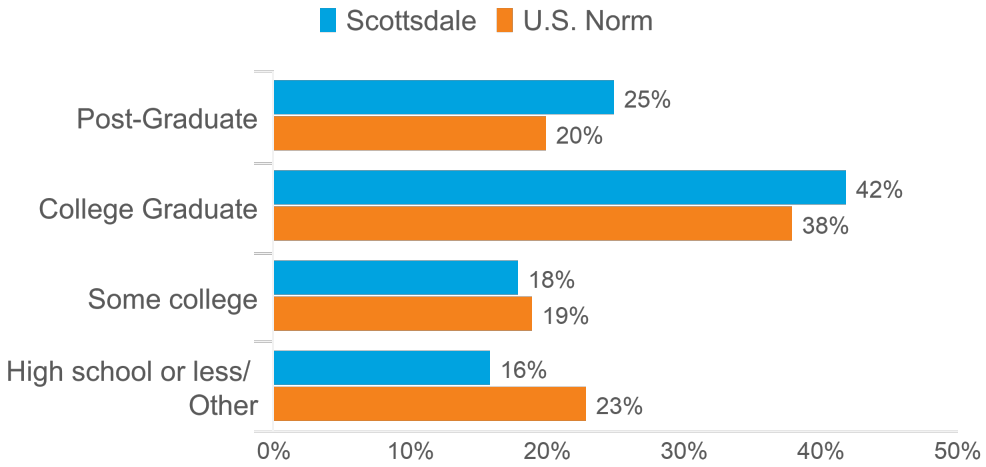
Marital Status



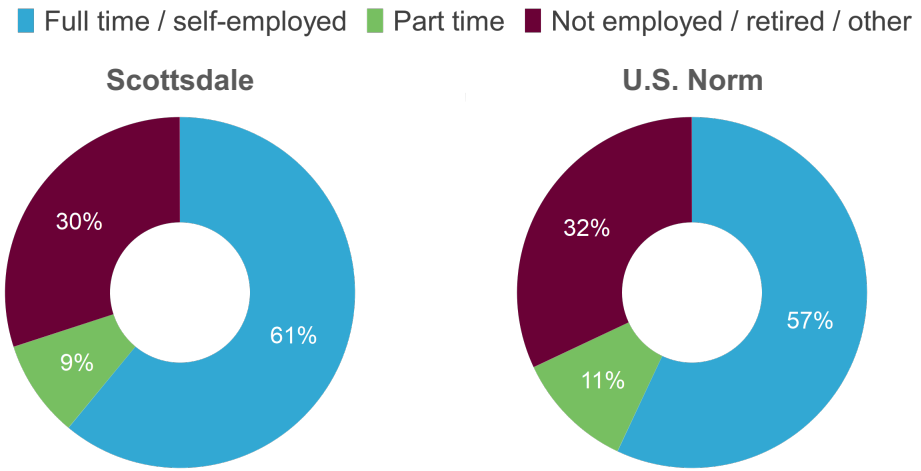
Demographic Profile of Overnight Scottsdale Visitors

Base: 2021 Overnight Person-Trips

Education

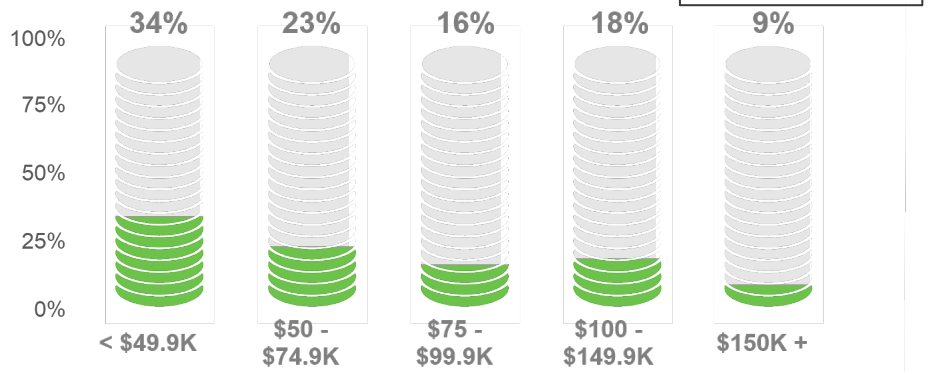


Employment



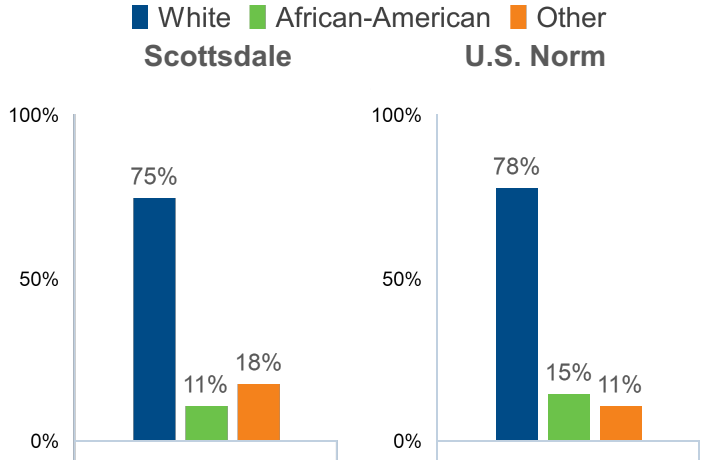
Household Income

Annual household income: $80,000

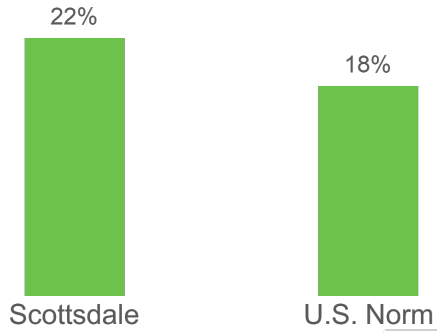


	< $49.9K	$50 - $74.9K	$75 - $99.9K	$100 - $149.9K	$150K +
U.S. Norm	41%	20%	15%	17%	8%

Race



Hispanic Background



Demographic Profile of Overnight Scottsdale Visitors

Base: 2021 Overnight Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	20%	29%	21%	16%	13%
U.S. Norm	21%	32%	19%	15%	13%

Children in Household

Scottsdale

No children under 18	47%
Any 13-17	23%
Any 6-12	34%
Any child under 6	20%

U.S. Norm

No children under 18	50%
Any 13-17	22%
Any 6-12	29%
Any child under 6	20%

COMPASS

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Travel USA Visitor Profile

Day Visitation

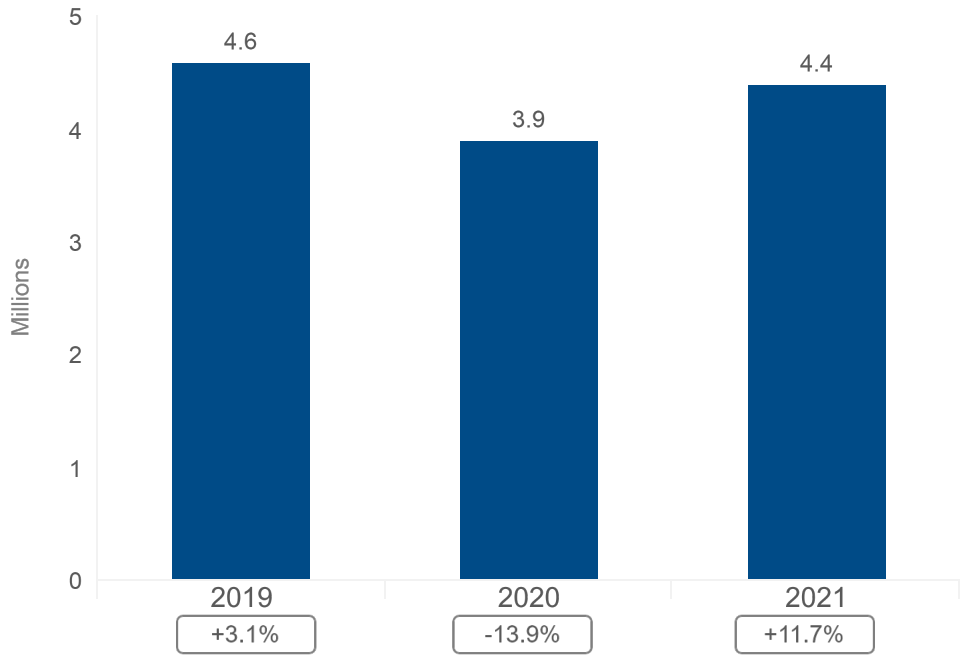
CITY OF SCOTTSDALE

2021

Size and Structure of Scottsdale's Domestic Travel Market

Base: 2021 Day Person-Trips

Day Trips to Scottsdale



Scottsdale's Day Trip Expenditures

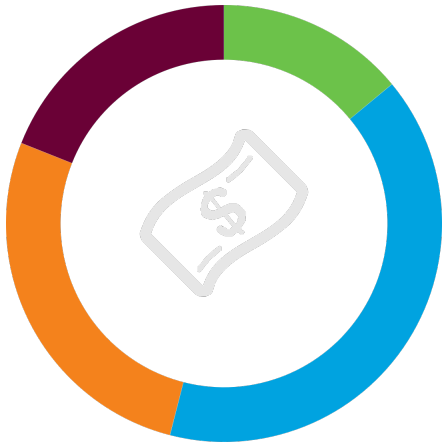
Base: 2021 Day Person-Trips

Domestic Day Expenditures - by Sector

Total Spending

$ 0.293 Billion

+11.7% vs. last year

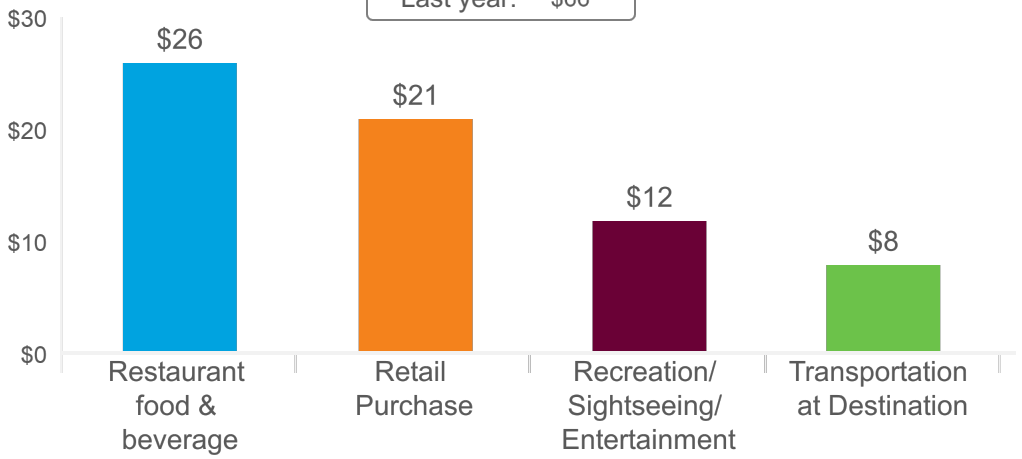


			vs. last year
Transportation at Destination	14%	$42 Million	+28.1%
Restaurant Food & Beverage	40%	$117 Million	+13.9%
Retail Purchase	27%	$80 Million	-1.1%
Recreation/Entertainment	19%	$55 Million	+17.8%

Average Per Person Expenditures on Domestic Day Trips - by Sector

Average Per Person: $ 66

Last year: $66



Average Per Person:

Leisure $65

Scottsdale's Day Trip Characteristics

Base: 2021 Day Person-Trips

Main Purpose of Trip

26% Visiting friends/ relatives

16% Touring

15% City trip

9% Shopping

8% Special event

7% Outdoors

4% Theme park

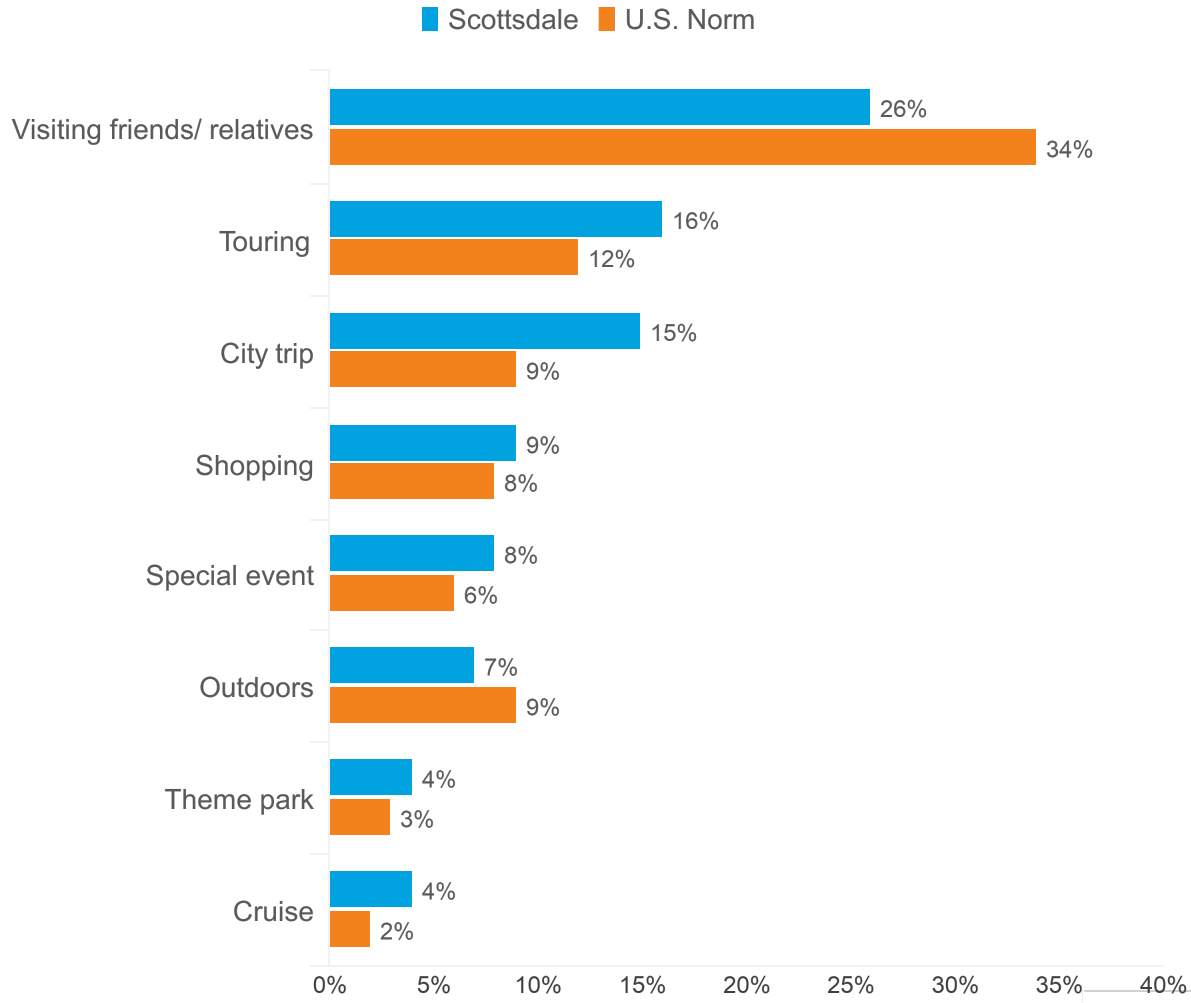
4% Cruise

0% Conference/ Convention

5% Other business trip

2% Business-Leisure

Main Purpose of Leisure Trip



Structure of the U.S. and Scottsdale Day Travel Market

Base: 2021 Day Person-Trips

2021 U.S. Day Trips

Visiting friends/relatives	34%
Marketable	58%
Business	5%
Business-leisure	3%

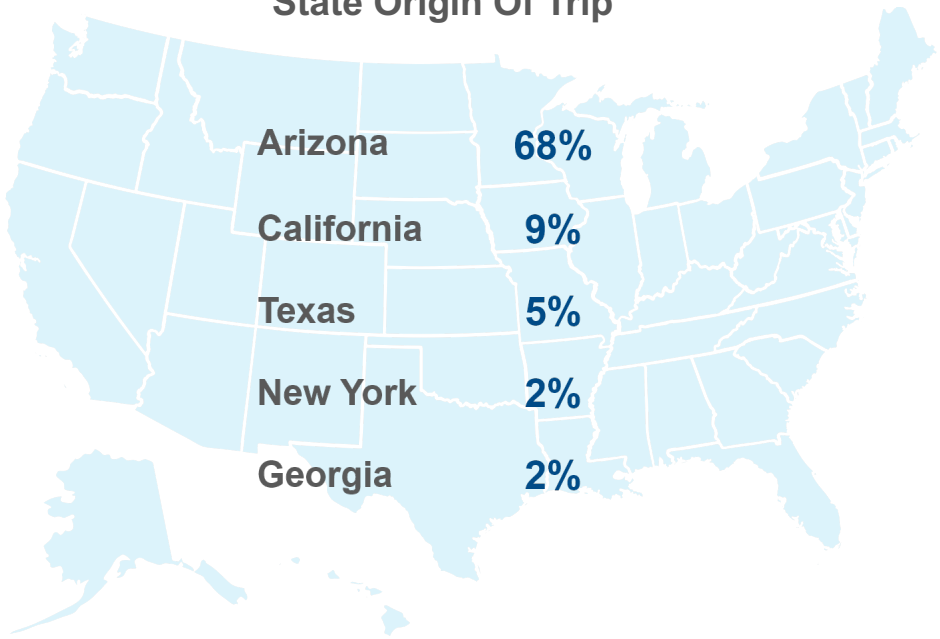
2021 Scottsdale Day Trips

Visiting friends/relatives	26%
Marketable	68%
Business	5%
Business-leisure	2%

Scottsdale's Day Trip Characteristics

Base: 2021 Day Person-Trips

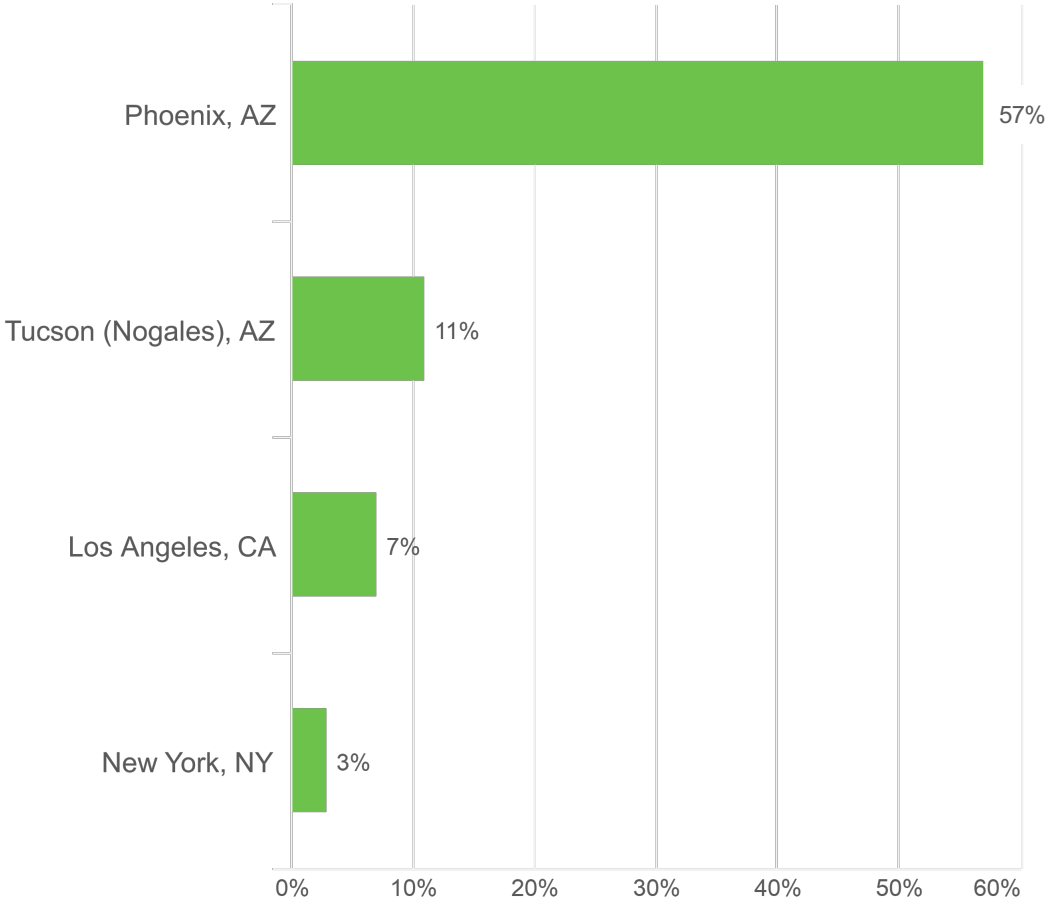
State Origin Of Trip



Season of Trip

Total Day Person-Trips

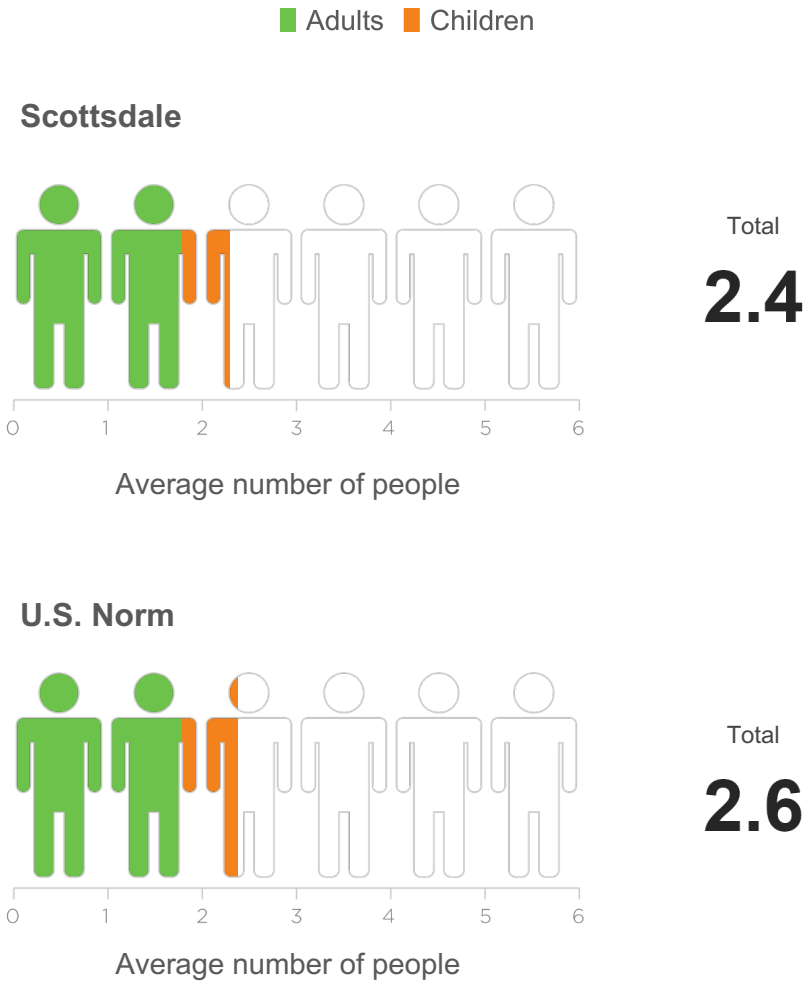
DMA Origin Of Trip



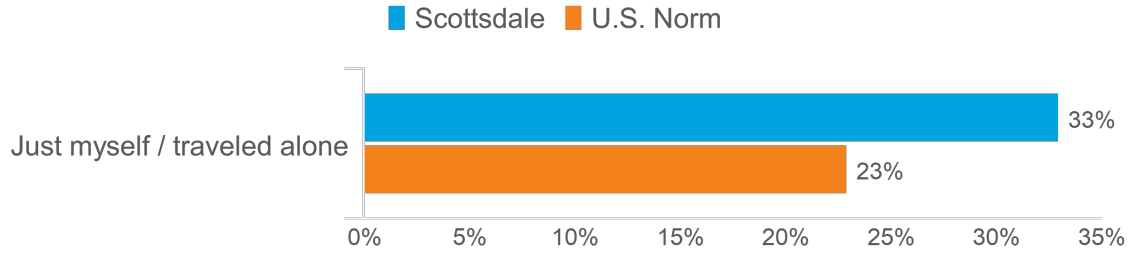
Scottsdale's Day Trip Characteristics

Base: 2021 Day Person-Trips

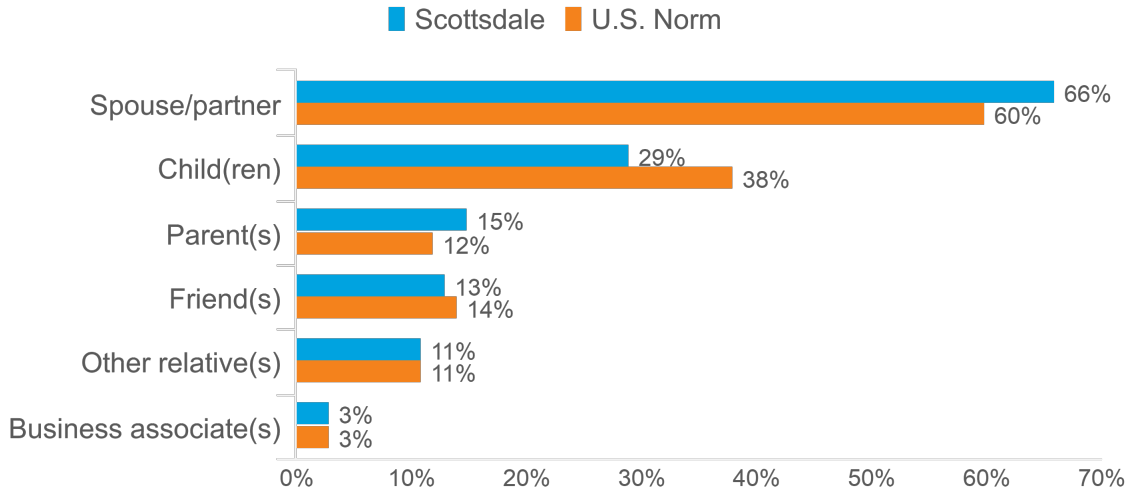
Size of Travel Party



Percent Who Traveled Alone



Composition of Immediate Travel Party



Scottsdale: During Trip

Base: 2021 Day Person-Trips

Activity Groupings

Outdoor Activities

40%

U.S. Norm: 36%

Entertainment Activities

62%

U.S. Norm: 48%

Cultural Activities

29%

U.S. Norm: 22%

Sporting Activities

17%

U.S. Norm: 17%

Business Activities

14%

U.S. Norm: 14%

Activities and Experiences (Top 10)

	Scottsdale	U.S. Norm
Shopping	24%	19%
Hiking/backpacking	13%	5%
Casino	12%	7%
Sightseeing	11%	11%
Museum	9%	7%
Business meeting	9%	6%
Swimming	8%	6%
Art gallery	8%	5%
Professional medical services	8%	5%
Nature tours/wildlife viewing/birding	8%	5%

Scottsdale: During Trip

Base: 2021 Day Person-Trips

Shopping Types on Trip

	Scottsdale	U.S. Norm
Outlet/mall shopping	**46%**	**46%**
Convenience/grocery shopping	**42%**	**26%**
Big box stores (Walmart, Costco)	**38%**	**28%**
Souvenir shopping	**23%**	**24%**
Antiquing	**16%**	**13%**
Boutique shopping	**14%**	**22%**

Base: 2021 Day Person-Trips that included Shopping

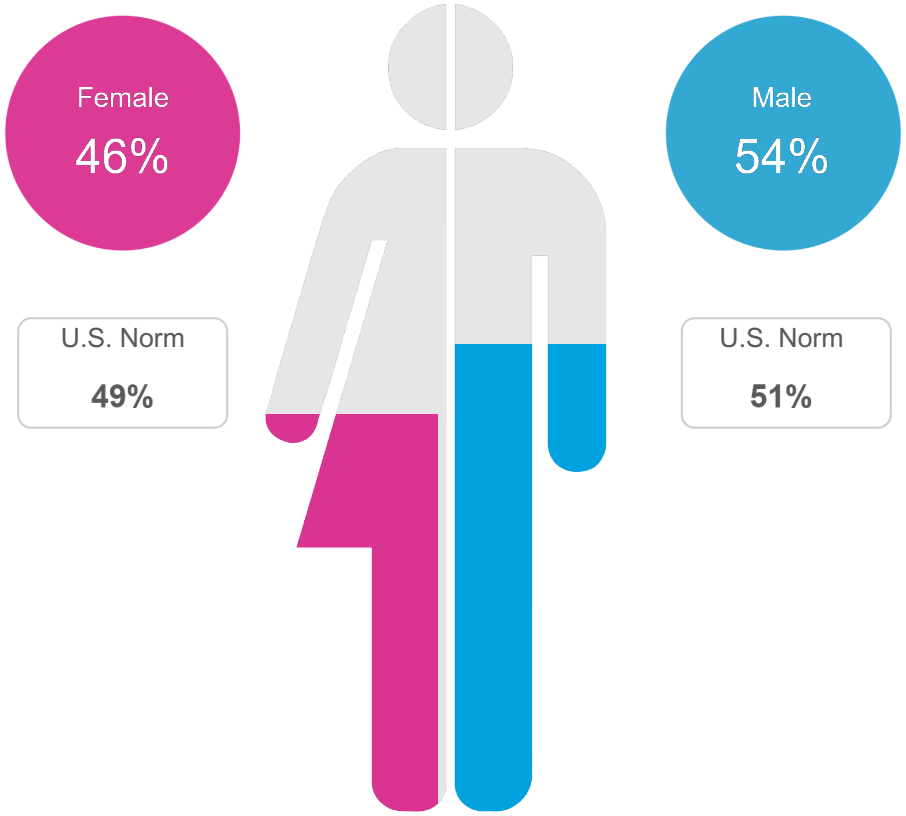
Dining Types on Trip

	Scottsdale	U.S. Norm
Unique/local food	**35%**	**34%**
Food delivery service (UberEATS, DoorDash, etc.)	**21%**	**15%**
Fine/upscale dining	**21%**	**15%**
Street food/food trucks	**16%**	**17%**
Picnicking	**10%**	**14%**
Gastropubs	**8%**	**7%**

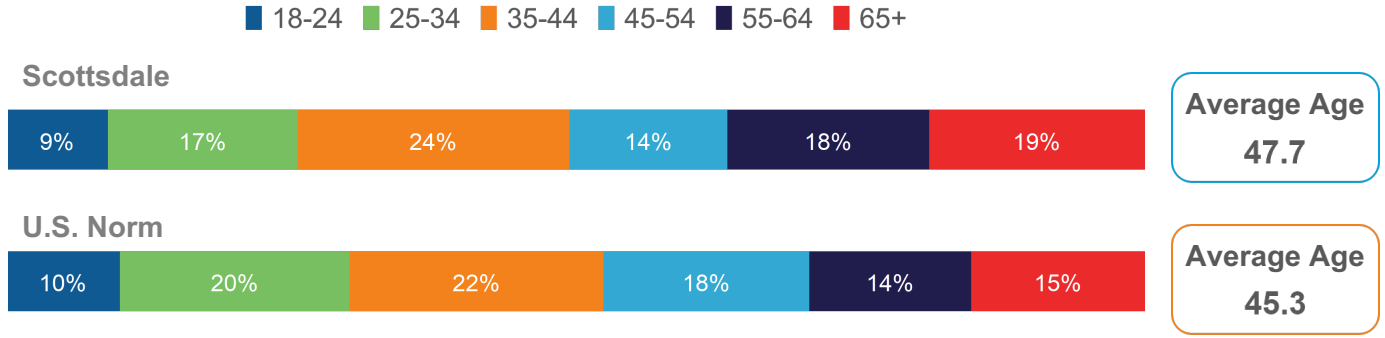
Demographic Profile of Day Scottsdale Visitors

Base: 2021 Day Person-Trips

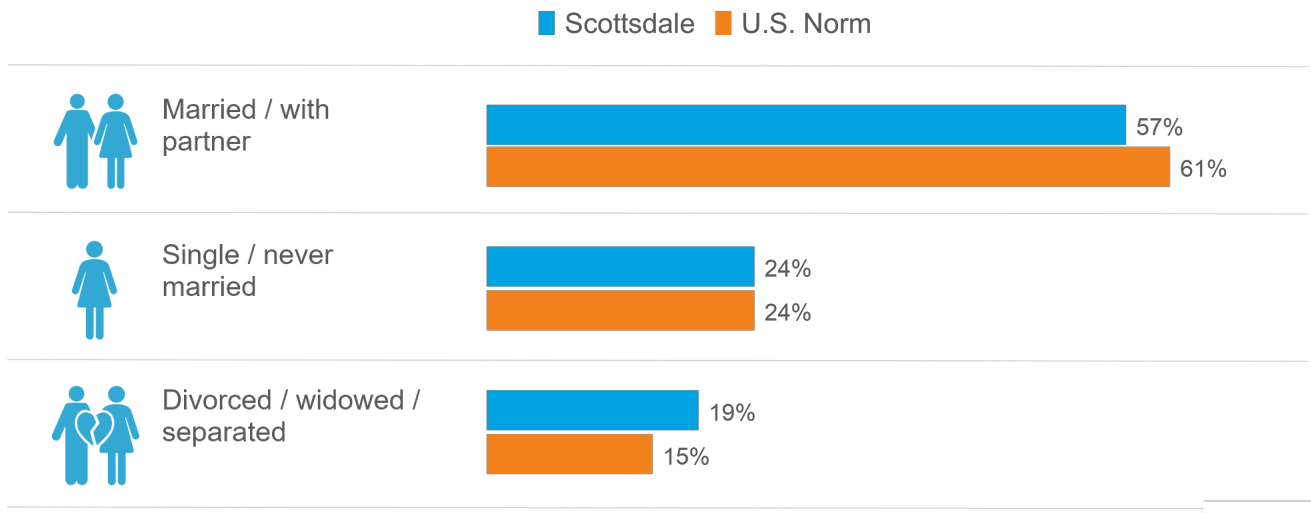
Gender



Age



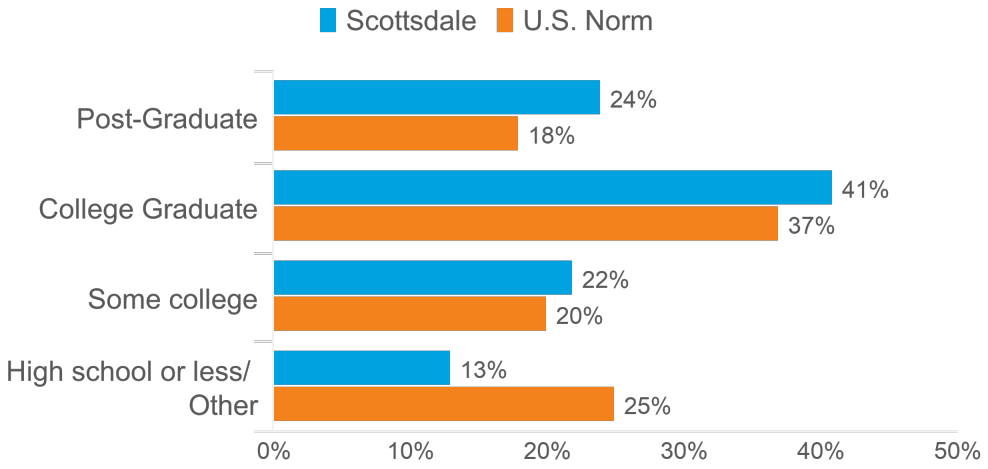
Marital Status



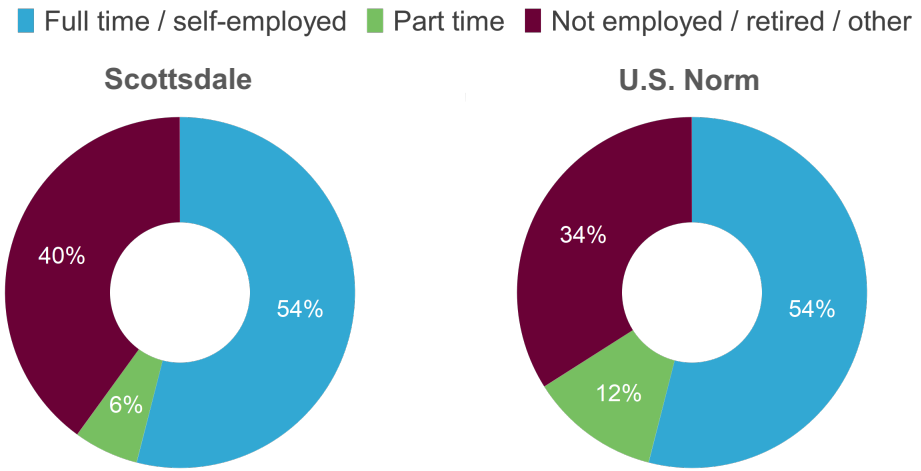
Demographic Profile of Day Scottsdale Visitors

Base: 2021 Day Person-Trips

Education

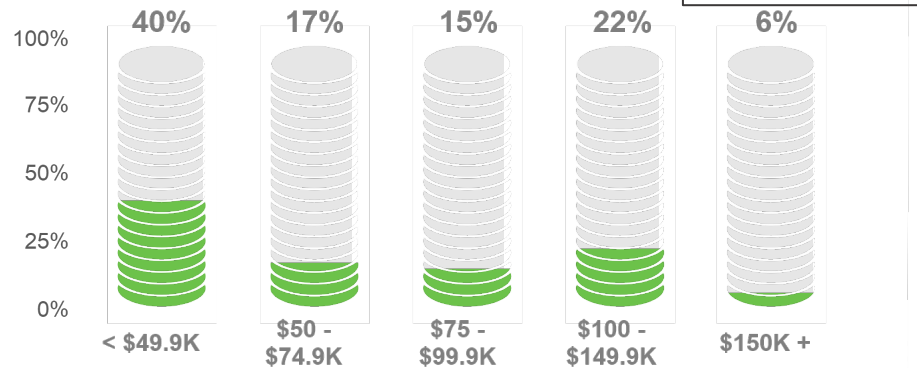


Employment



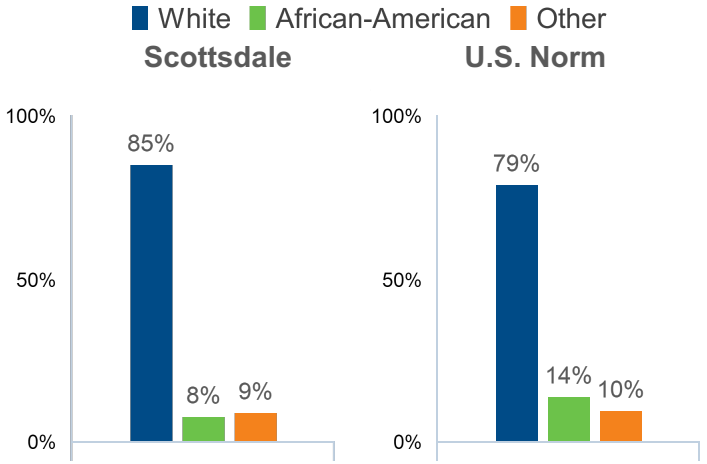
Household Income

Annual household income: $76,500

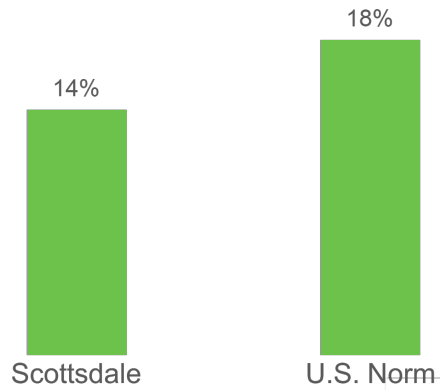


	< $49.9K	$50 - $74.9K	$75 - $99.9K	$100 - $149.9K	$150K +
U.S. Norm	42%	21%	15%	16%	6%

Race



Hispanic Background



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Demographic Profile of Day Scottsdale Visitors

Base: 2021 Day Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	33%	31%	20%	9%	7%
U.S. Norm	21%	33%	20%	14%	11%

Children in Household

Scottsdale

No children under 18	64%
Any 13-17	13%
Any 6-12	23%
Any child under 6	15%

U.S. Norm

No children under 18	52%
Any 13-17	20%
Any 6-12	28%
Any child under 6	20%

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COMPASS
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