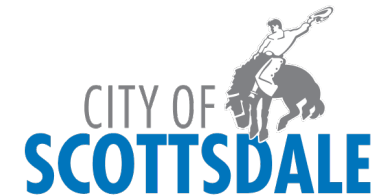




Travel USA Visitor Profile

Scottsdale



2023

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 or 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 2023.

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 2023:



Overnight Base Size

820



Day Base Size

223

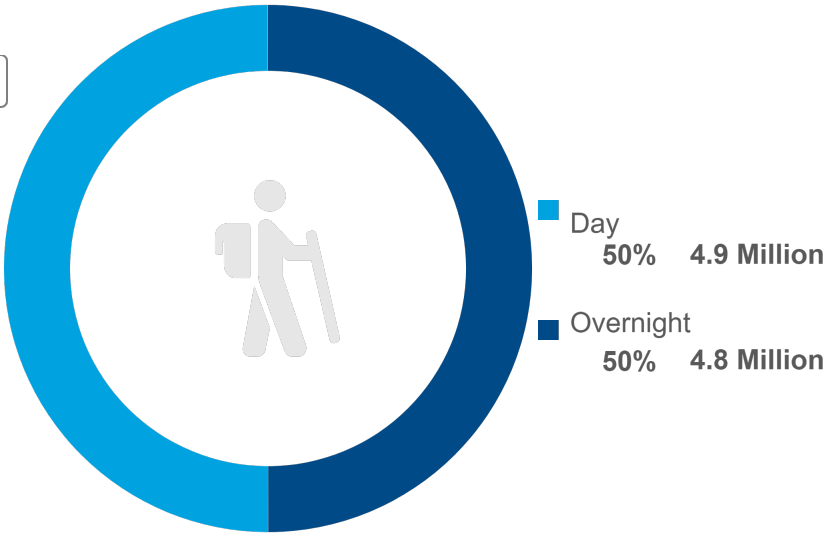
For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Total Size of Scottsdale 2023 Domestic Travel Market

Total Person-Trips

9.8 Million

+2.5% vs. last year

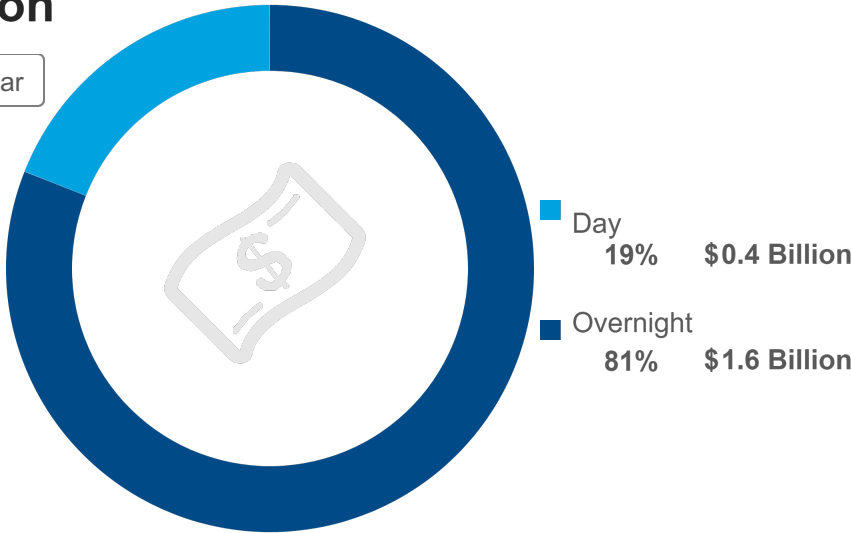


Total Expenditures for Scottsdale 2023 Domestic Travel Market

Total Spending

\$ 1.9 Billion

+5.5% vs. last year





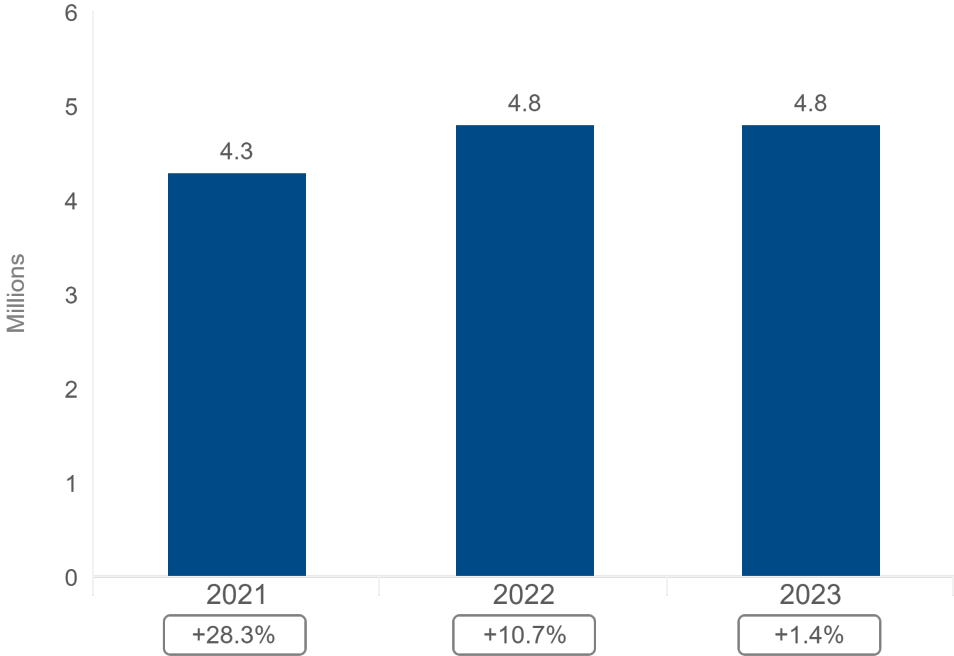
Travel USA Visitor Profile

Overnight Visitation



2023

Overnight Trips to Scottsdale



Past Visitation to Scottsdale

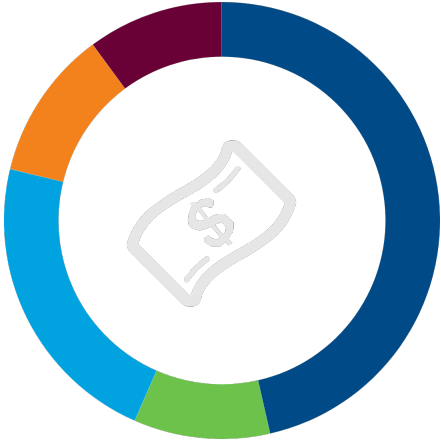
79% of overnight travelers to Scottsdale are repeat visitors

57% of overnight travelers to Scottsdale had visited before in the past 12 months

Domestic Overnight Expenditures - by Sector

Total Spending
\$ 1.561 Billion

+5.0% vs. last year



Lodging	46%	\$724 Million
Transportation at Destination	10%	\$161 Million
Restaurant Food & Beverage	22%	\$339 Million
Retail Purchase	11%	\$177 Million
Recreation/Entertainment	10%	\$160 Million

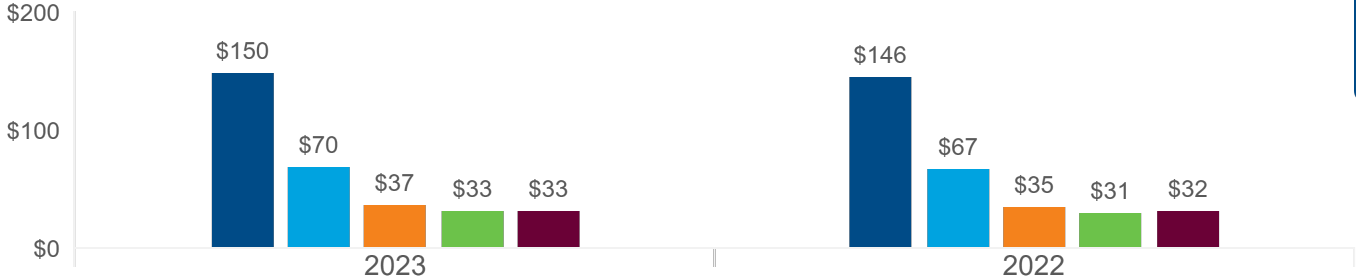
vs. last year
+4.0%
+8.8%
+5.0%
+4.9%
+5.7%

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

Average Per Person Per Trip: \$322

Last year: \$311

Average Per Person Per Trip:
 Leisure \$321














■ Lodging
 ■ Restaurant food & beverage
 ■ Retail Purchase
 ■ Transportation at Destination
 ■ Recreation/ Sightseeing/ Entertainment

Scottsdale's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

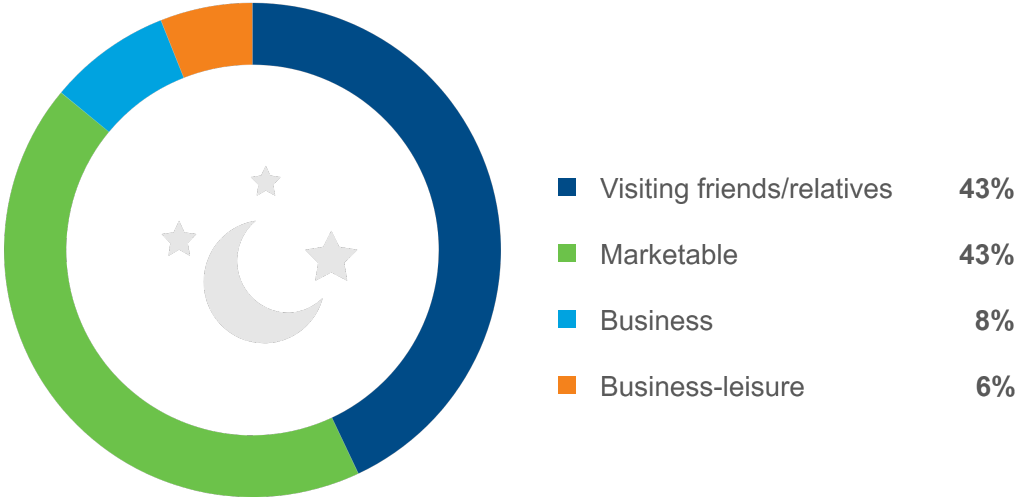
Main Purpose of Trip

 43% Visiting friends/ relatives	
 11% Touring	 2% Conference/ Convention
 10% Special event	
 7% Outdoors	
 5% City trip	 6% Other business trip
 3% Casino	
 2% Resort	 6% Business-Leisure
 2% Golf Trip	

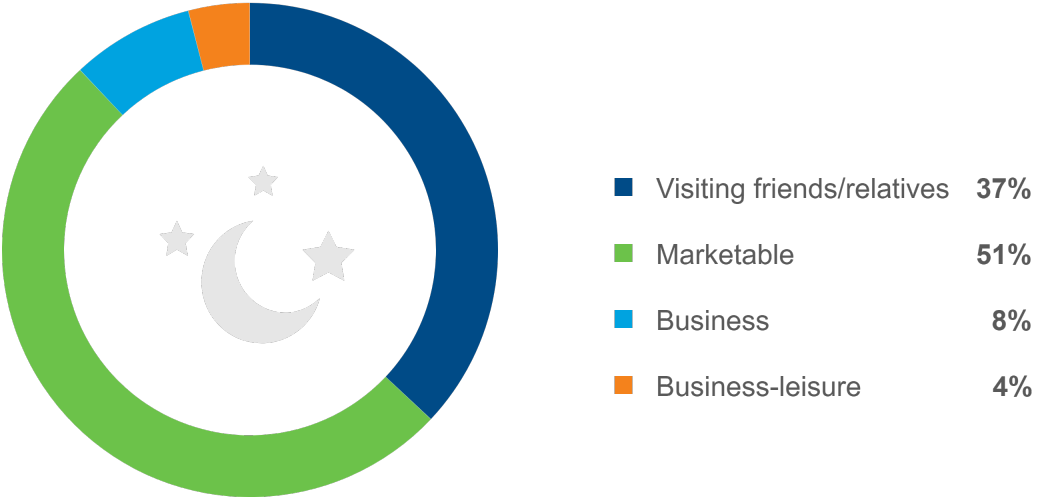
Main Purpose of Leisure Trip

	2023	2022
Visiting friends/ relatives	43%	37%
Touring	11%	13%
Special event	10%	9%
Outdoors	7%	8%
City trip	5%	8%
Casino	3%	4%
Resort	2%	3%
Golf Trip	2%	2%

2023 Scottsdale Overnight Trips



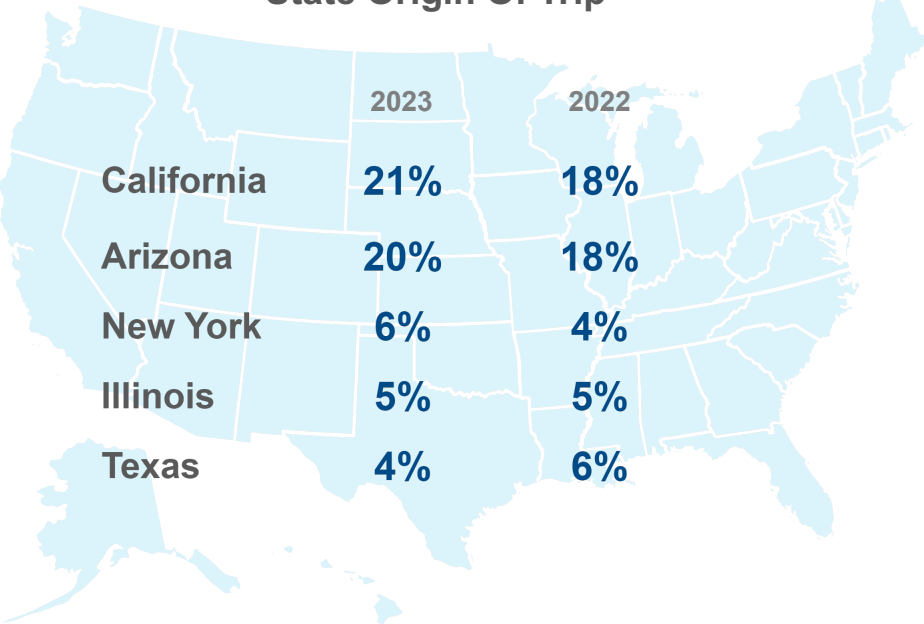
Last Year's Scottsdale Overnight Trips



Scottsdale's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

State Origin Of Trip



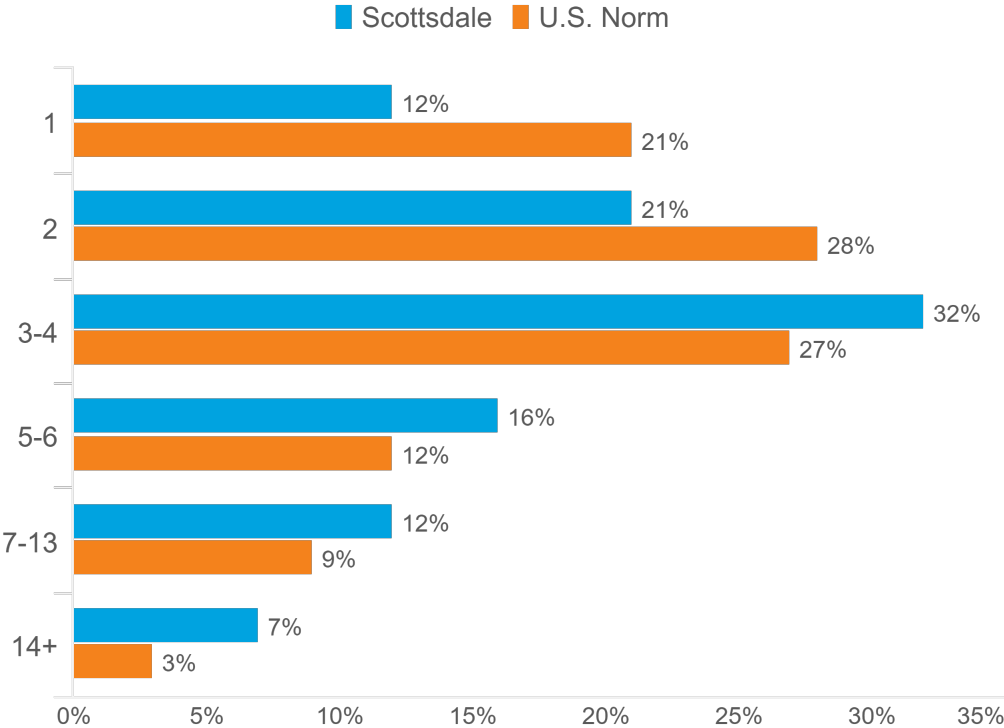
DMA Origin Of Trip

	2023	2022
Phoenix, AZ	16%	13%
Los Angeles, CA	14%	12%
New York, NY	7%	4%
Chicago, IL	4%	4%
Tucson (Nogales), AZ	3%	5%
Denver, CO	3%	3%
Albuquerque-Santa Fe, NM	3%	2%
Las Vegas, NV	3%	3%
San Francisco-Oakland-San Jose, CA	3%	2%



Season of Trip Total Overnight Person-Trips

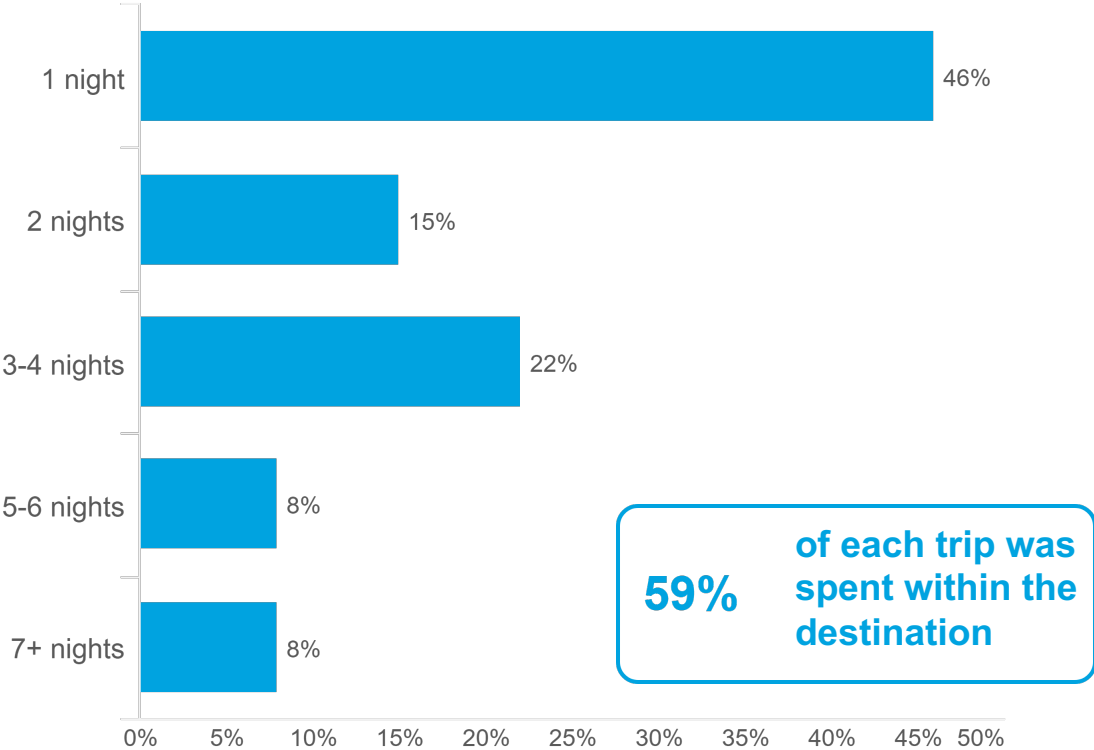
Total Nights Away on Trip



Scottsdale
5.1
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Scottsdale



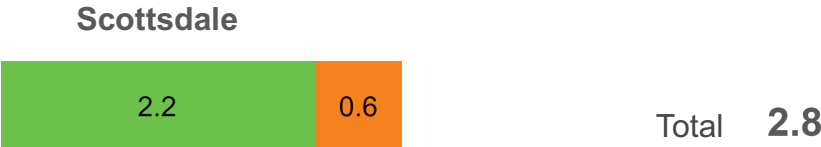
59% of each trip was spent within the destination

Average number of nights
3.0

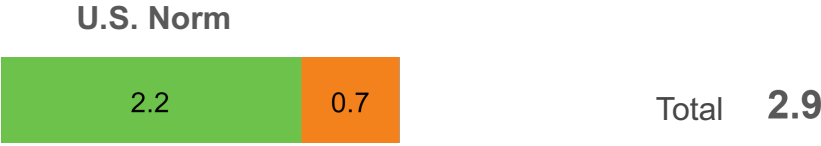
Average last year
3.3

Size of Travel Party

■ Adults ■ Children



Average number of people



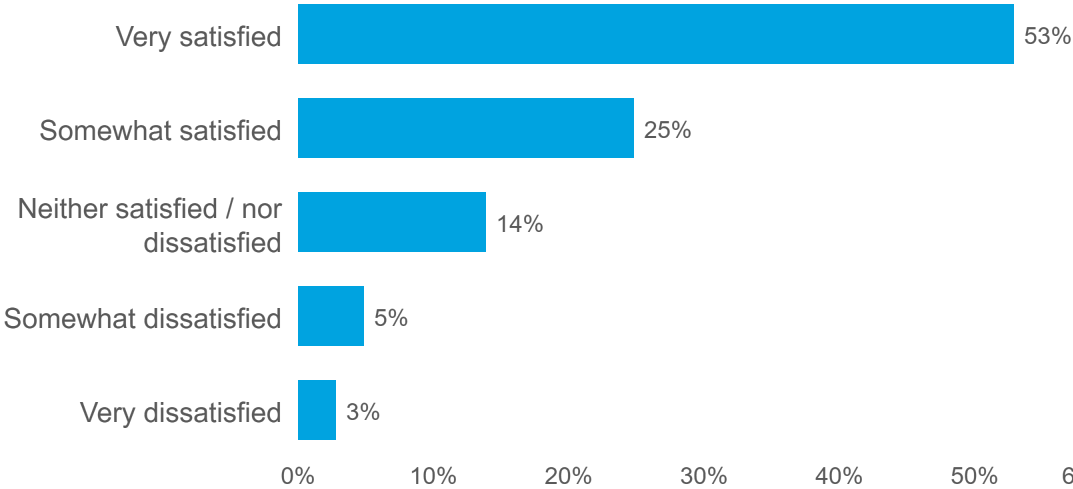
Average number of people



24% of travel parties had a travel party member that required accessibility services
U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party





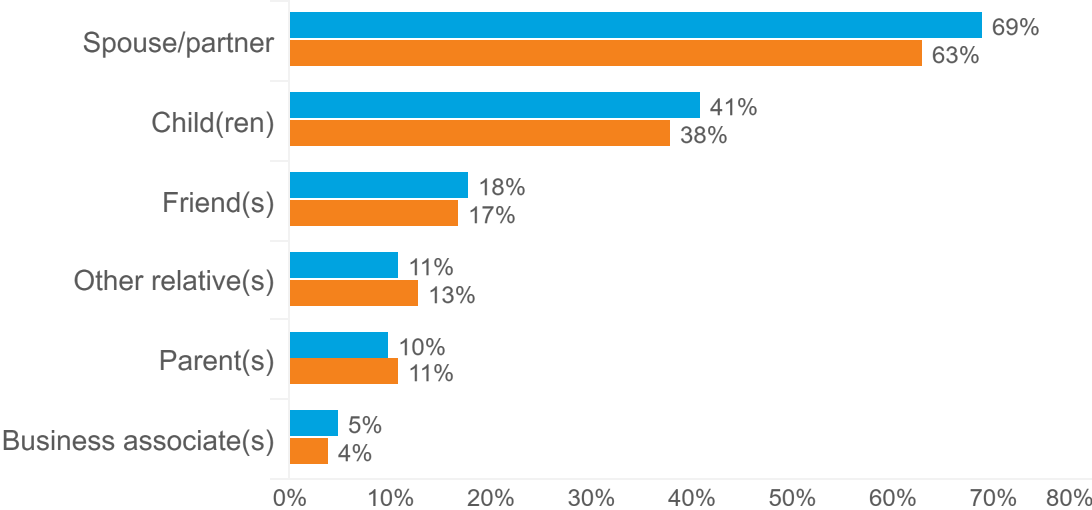
25% of trips only had one person in the travel party

U.S. Norm: 24%

Composition of Immediate Travel Party

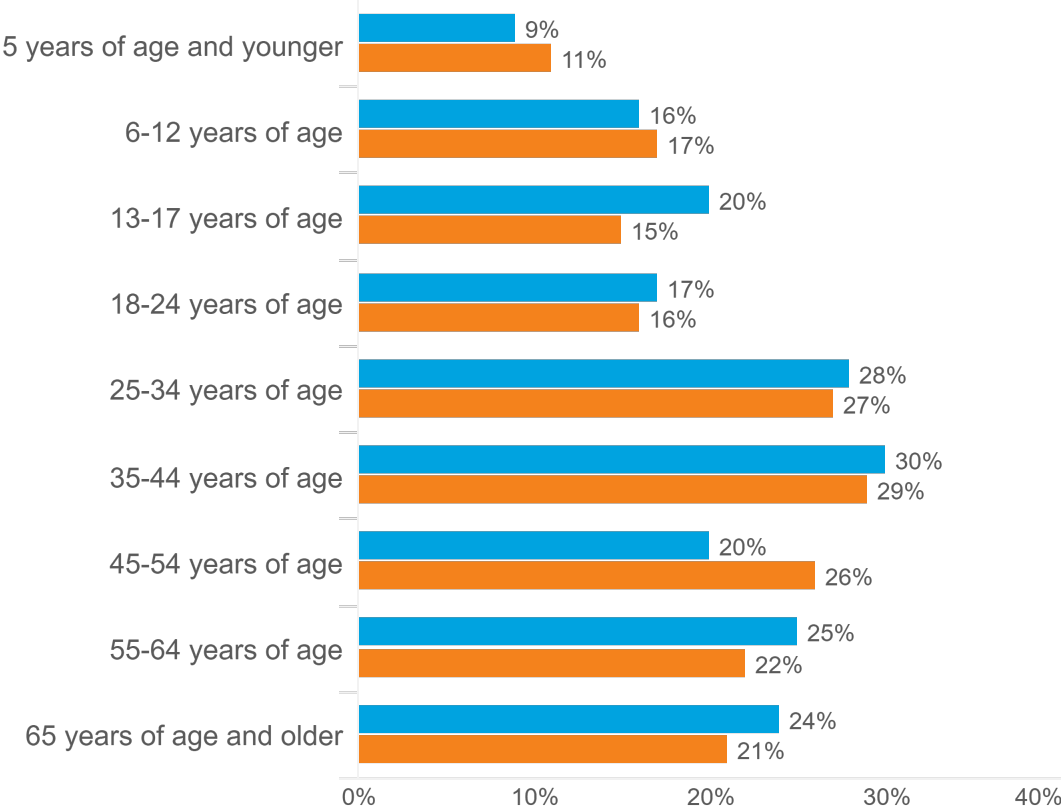
Base: 2023 Overnight Person-Trips that included more than one person

■ Scottsdale ■ U.S. Norm



Travel Party Age

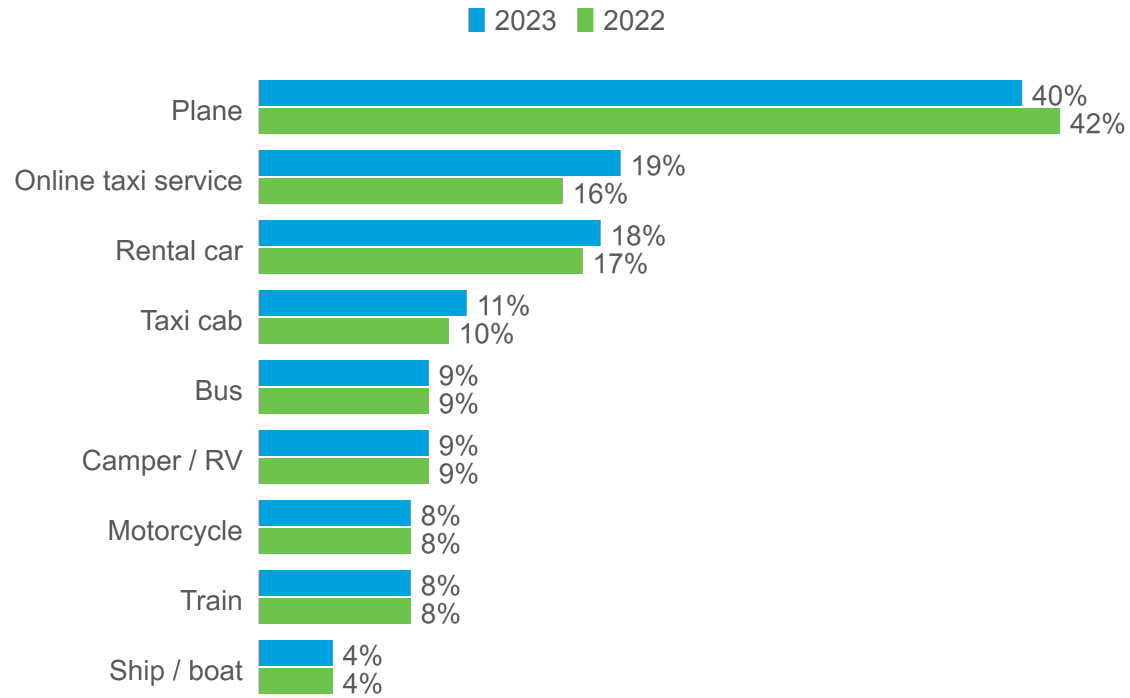
■ Scottsdale ■ U.S. Norm



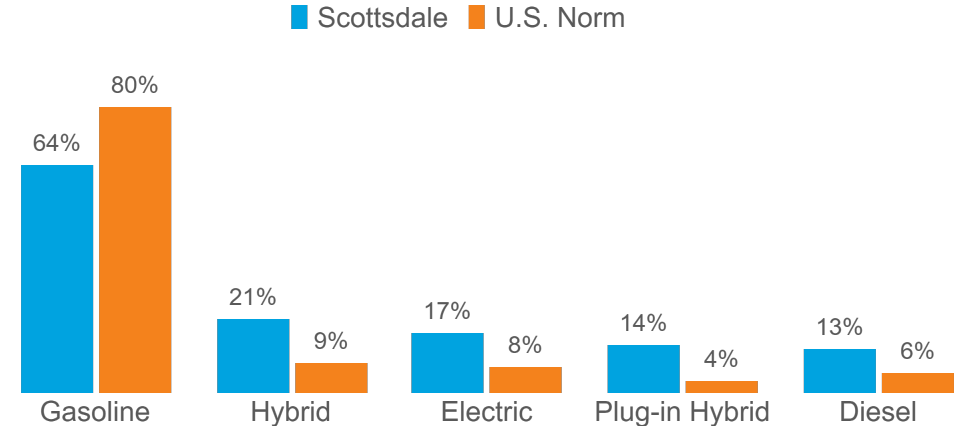
Transportation Used to get to Destination

57% of overnight travelers use own car/truck to get to their destination

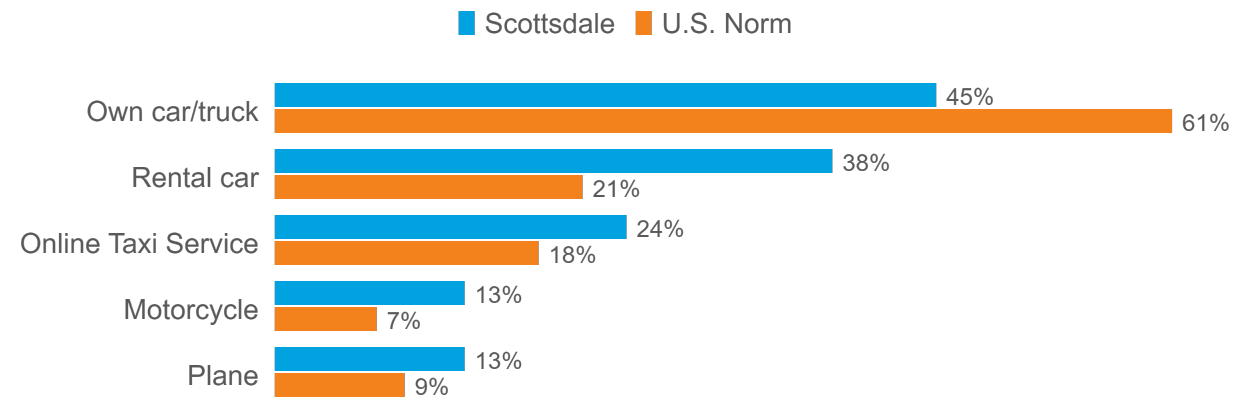
Previous year: **54%**



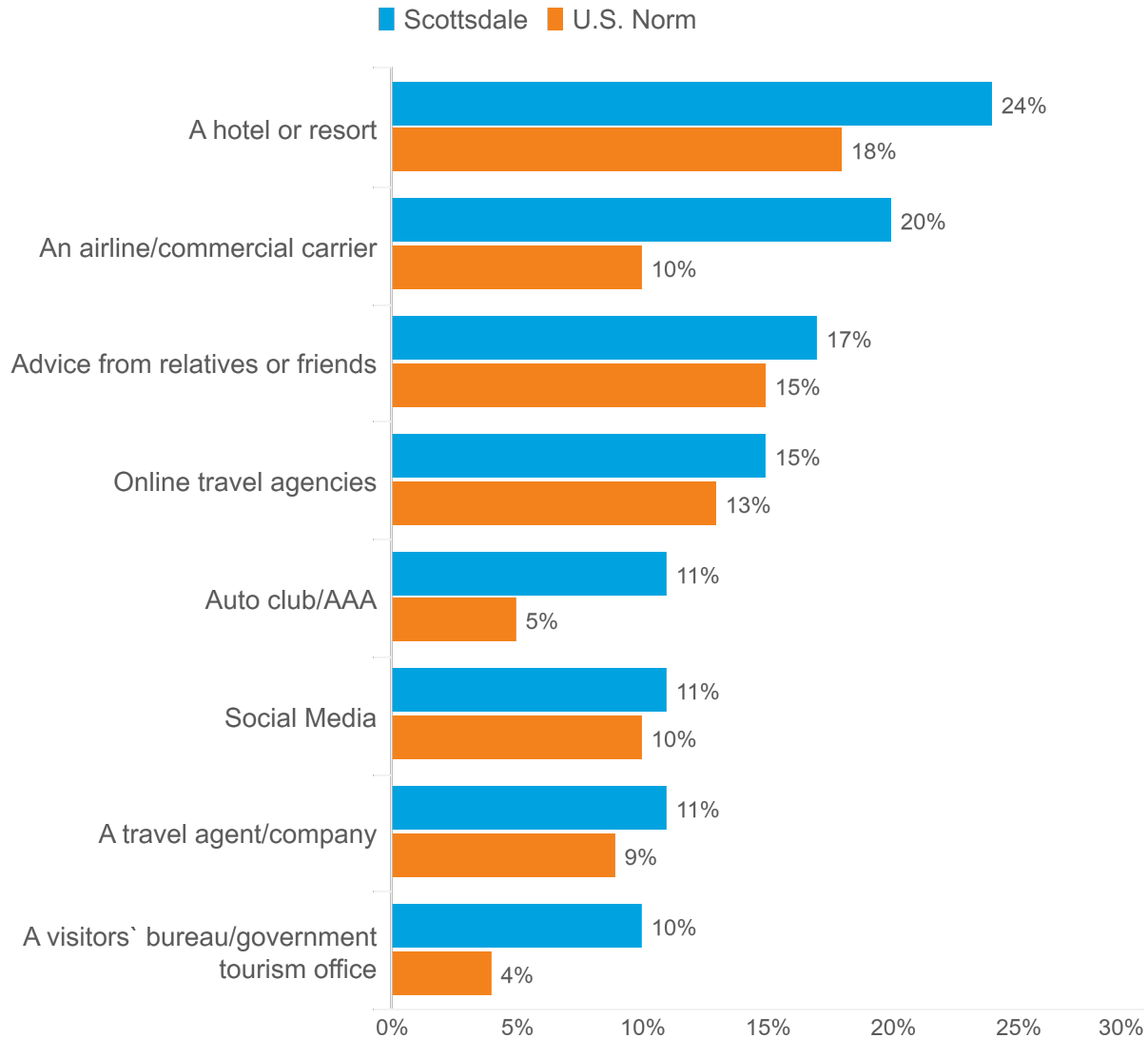
Type of Vehicle Used to get to Destination



Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

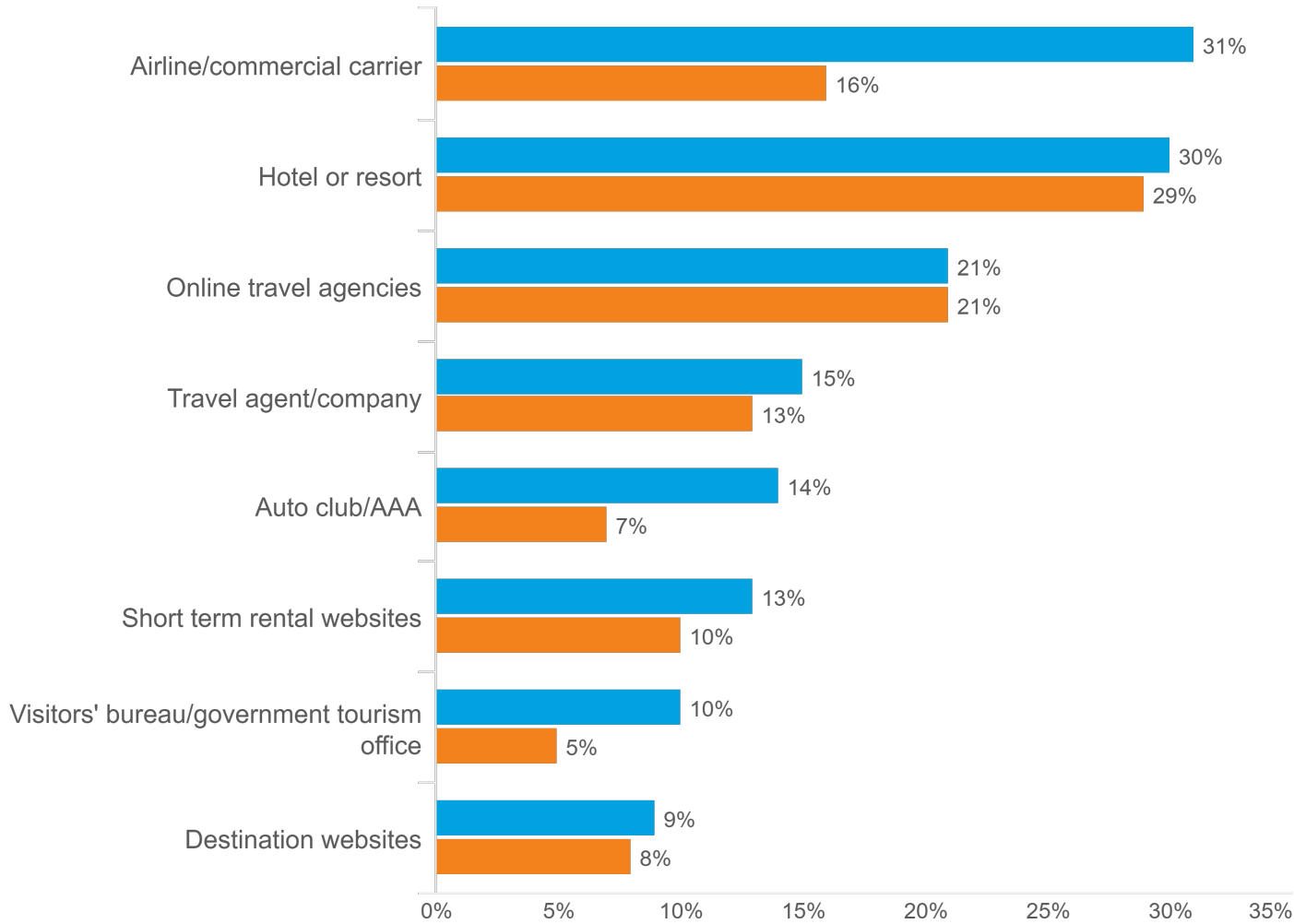
	Scottsdale	U.S. Norm
1 month or less	26%	33%
2 months	21%	17%
3-5 months	24%	18%
6-12 months	16%	13%
More than 1 year in advance	5%	4%
Did not plan anything in advance	9%	15%

Scottsdale's Overnight Trip Characteristics








Base: 2023 Overnight Person-Trips

Method of Booking

■ Scottsdale ■ U.S. Norm



Accommodations

	2023	2022
 Hotel	44%	39%
 Resort hotel	20%	18%
 Home of friends / relatives	20%	20%
 Motel	13%	15%
 Rented home / condo / apartment	13%	8%
 Country inn / lodge	10%	8%
 Bed & breakfast	10%	7%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities



U.S. Norm: 15%

Activities and Experiences (Top 10)







	2023	2022
Shopping	31%	31%
Sightseeing	26%	24%
Attending celebration	22%	17%
Bar/nightclub	20%	16%
Landmark/historic site	18%	16%
Museum	17%	15%
Swimming	17%	17%
Hiking/backpacking	16%	17%
Attended pro/college sports event	16%	12%
Casino	14%	11%

Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

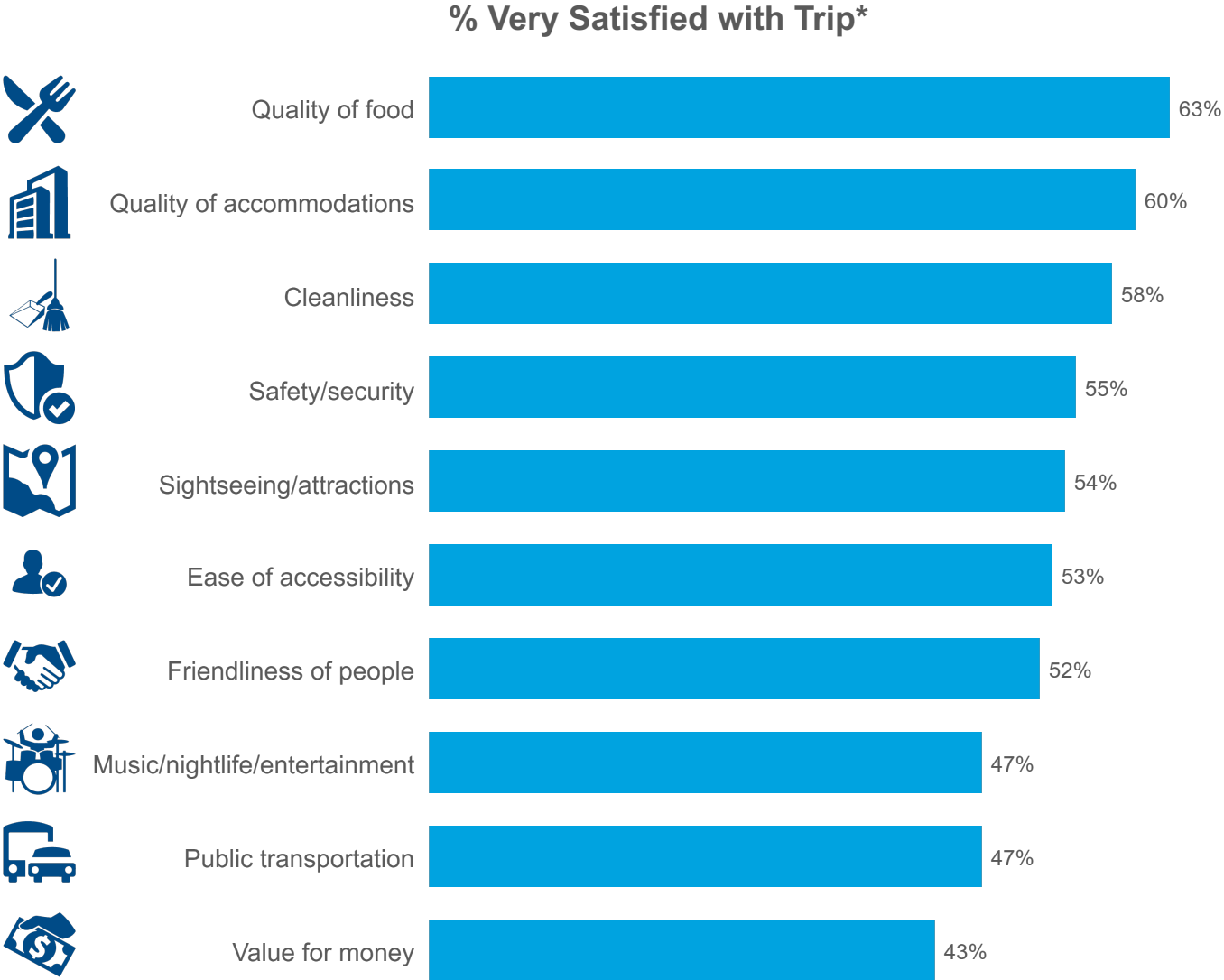
	Scottsdale	U.S. Norm
 Convenience/grocery shopping	52%	42%
 Outlet/mall shopping	52%	44%
 Shopping at locally owned businesses	48%	48%
 Souvenir shopping	38%	38%
 Big box stores (Walmart, Costco)	38%	30%
 Farmers market	24%	17%
 Antiquing	16%	12%

Dining Types on Trip

	Scottsdale	U.S. Norm
 Casual dining	64%	56%
 Fast food	45%	45%
 Unique/local food	39%	30%
 Fine/upscale dining	35%	19%
 Carry-out/food delivery service	31%	22%
 Picnicking	16%	11%



64%
of overnight travelers were
very satisfied with their overall
trip experience



*Very satisfied = selected top box on a five point scale
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

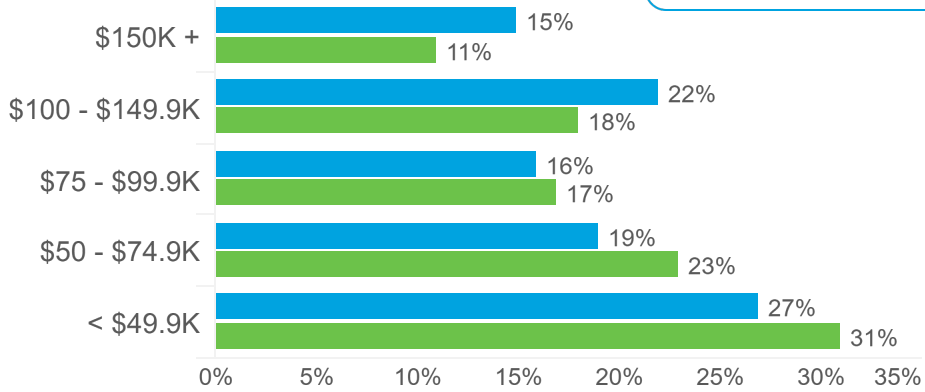
Demographic Profile of Overnight Scottsdale Visitors

Base: 2023 Overnight Person-Trips

Household Income

2023 2022

Average Income: 95.1K



Age

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

Scottsdale



Average Age
46.5

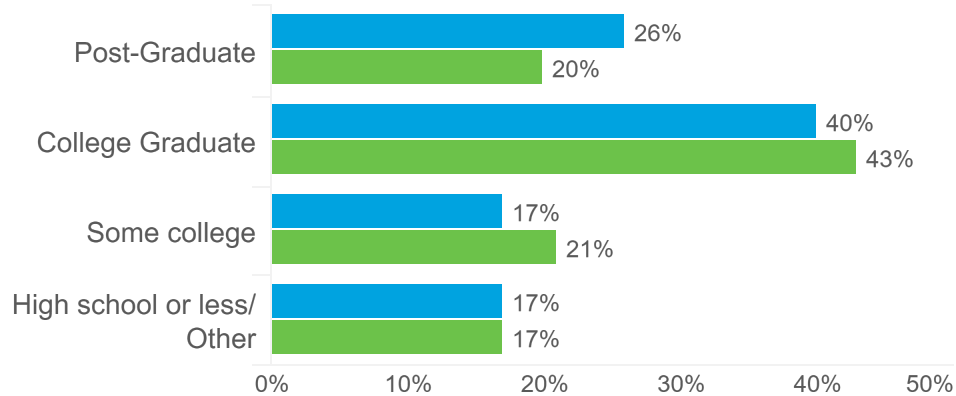
Previous Year



Average Age
44.7

Educational Attainment

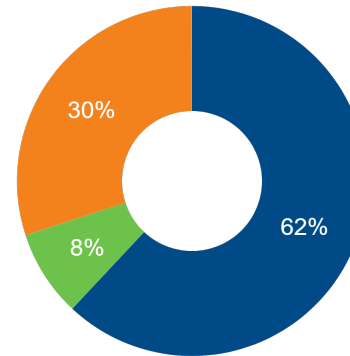
2023 2022



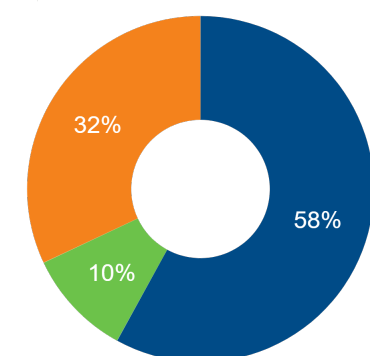
Employment

Full time / self-employed Part time Retired / not employed / other

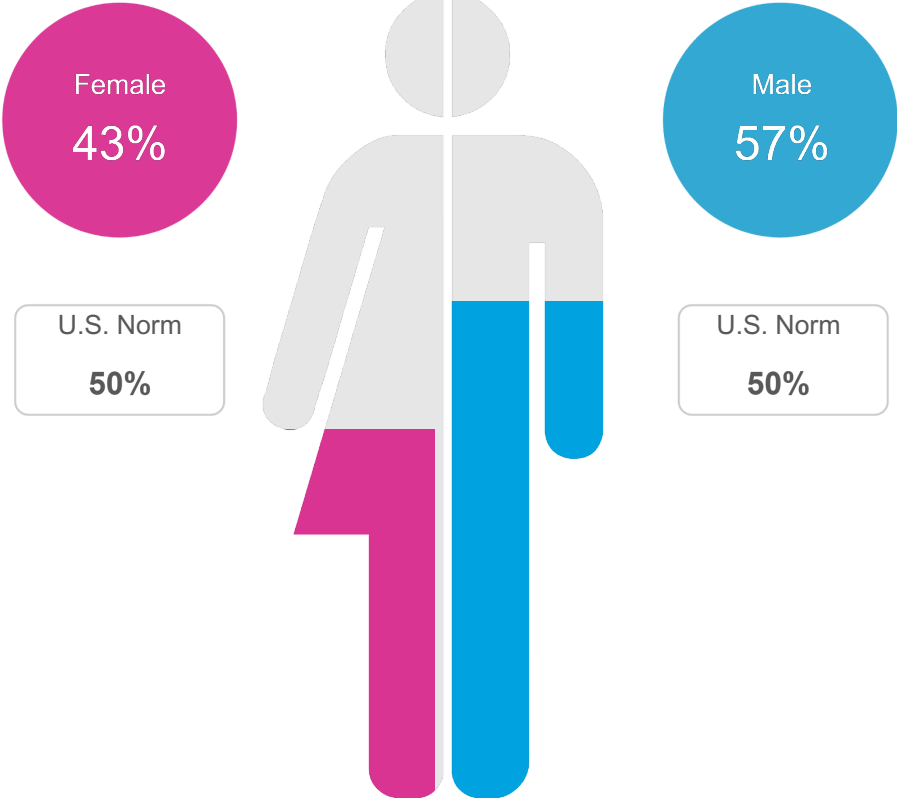
Scottsdale



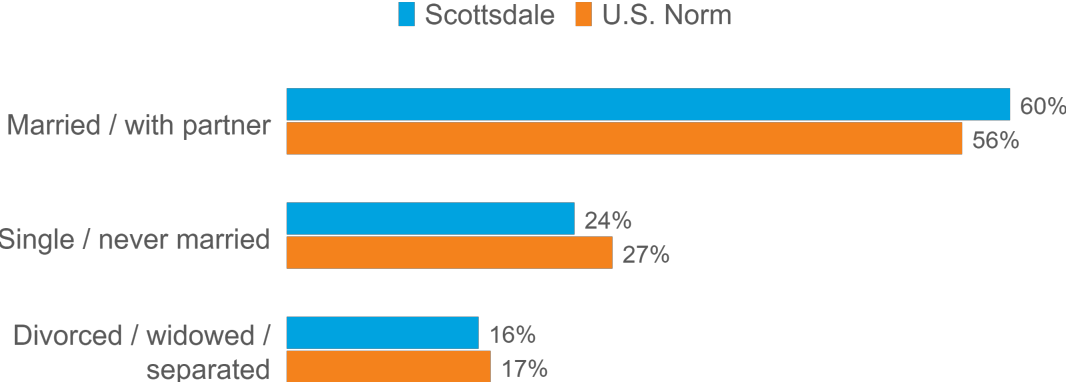
Scottsdale's Previous Year



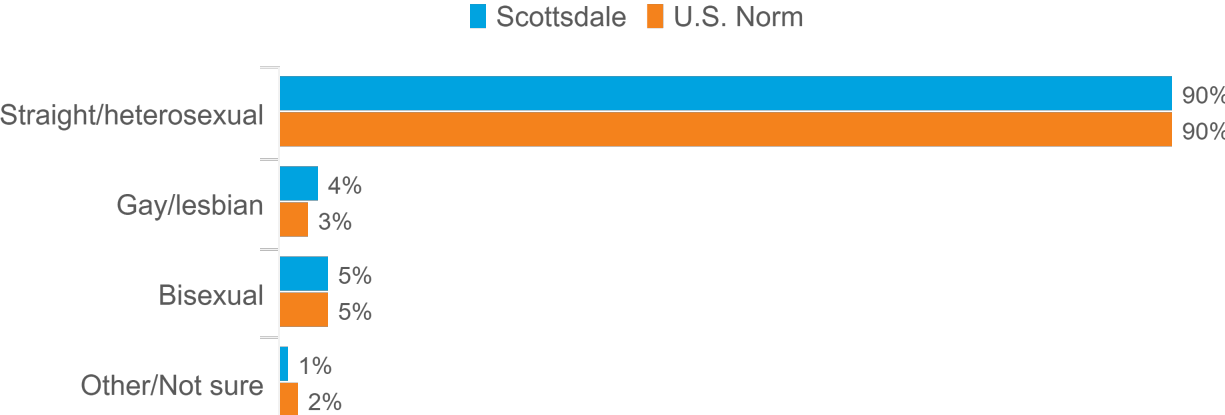
Gender



Marital Status



Sexual Orientation

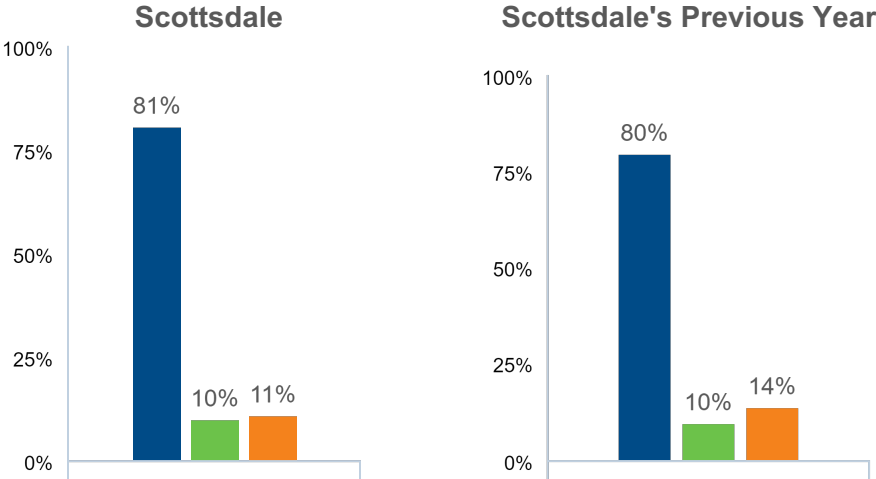


Demographic Profile of Overnight Scottsdale Visitors

Base: 2023 Overnight Person-Trips

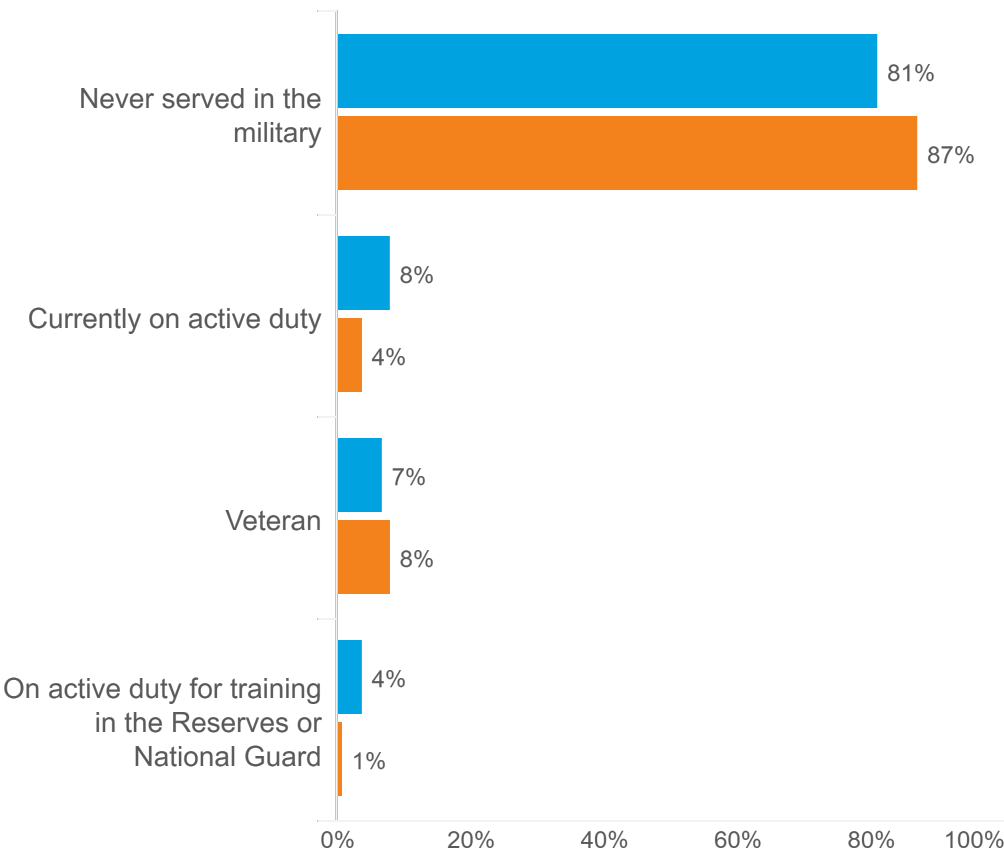
Race

White African-American Other



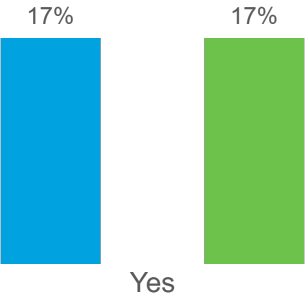
Military Status

Scottsdale U.S. Norm

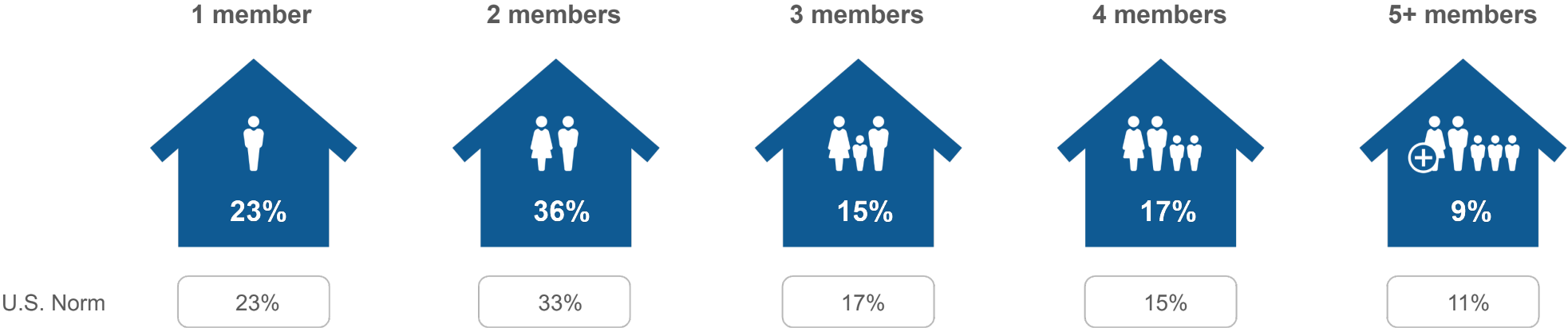


Hispanic Background

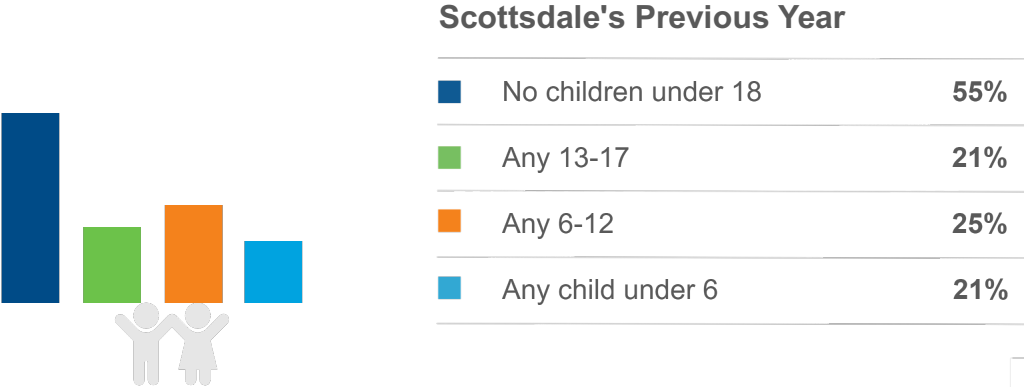
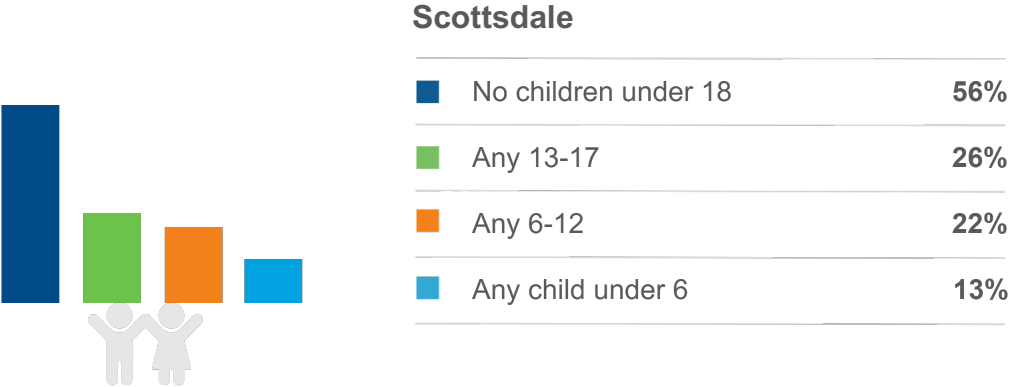
2023 2022



Household Size



Children in Household





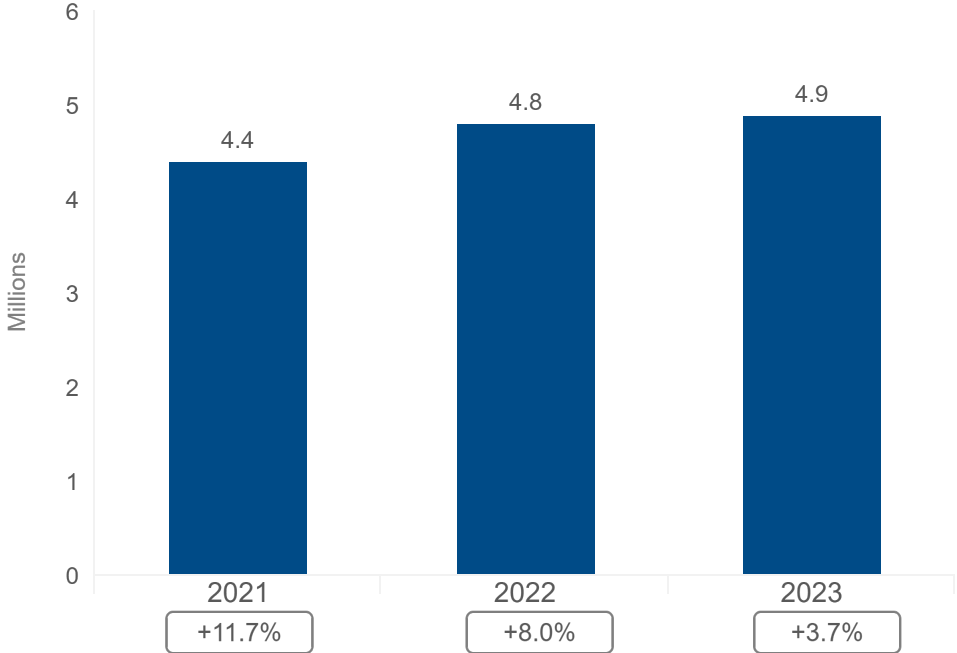
Travel USA Visitor Profile

Day Visitation



2023

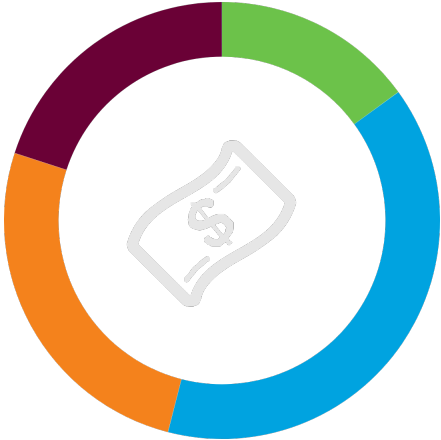
Day Trips to Scottsdale



Domestic Day Expenditures - by Sector

Total Spending
\$ 0.368 Billion

+7.8% vs. last year



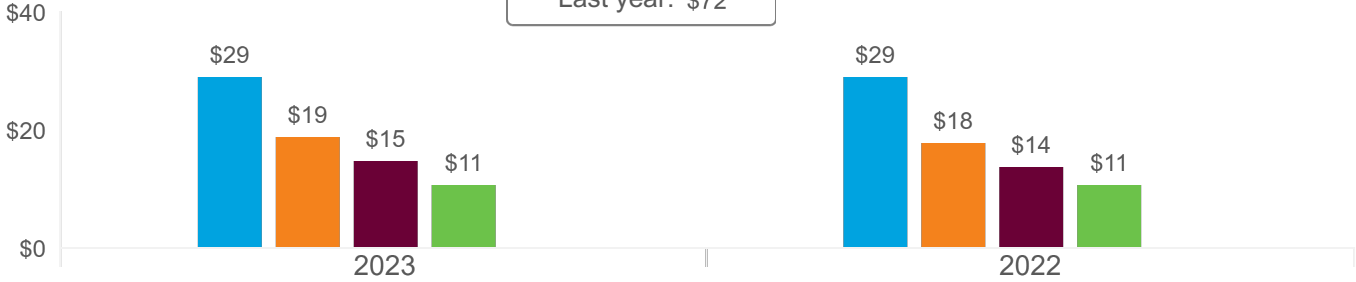
Transportation at Destination	15%	\$56 Million
Restaurant Food & Beverage	39%	\$145 Million
Retail Purchase	26%	\$94 Million
Recreation/Entertainment	20%	\$72 Million

vs. last year
+11.1%
+6.6%
+7.5%
+8.3%

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

Average Per Person Per Trip: \$74

Last year: \$72



■ Restaurant food & beverage
 ■ Retail Purchase
 ■ Recreation/ Sightseeing/ Entertainment
 ■ Transportation at Destination

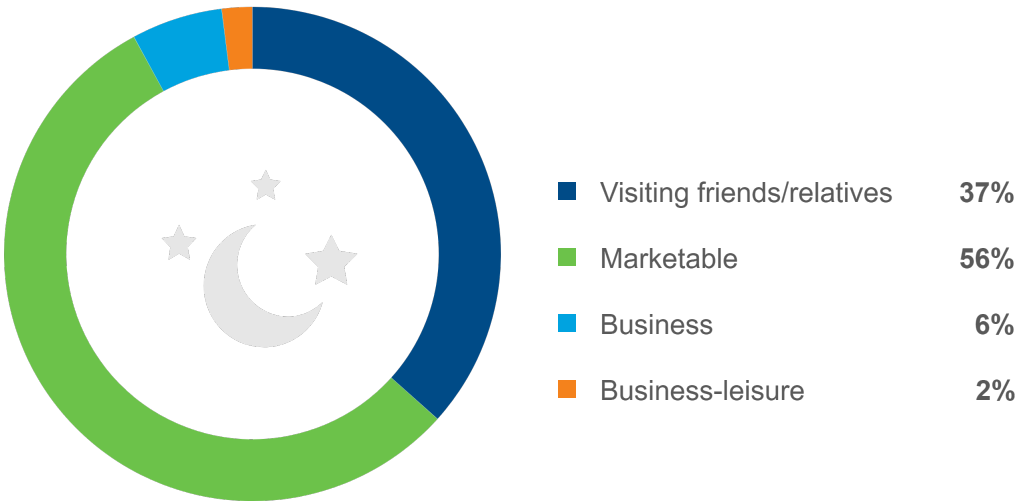
Main Purpose of Trip

 37% Visiting friends/ relatives	
 13% Touring	 1% Conference/ Convention
 10% Special event	
 9% Outdoors	
 9% Shopping	 5% Other business trip
 6% City trip	
 4% Casino	 2% Business-Leisure
 2% Theme park	

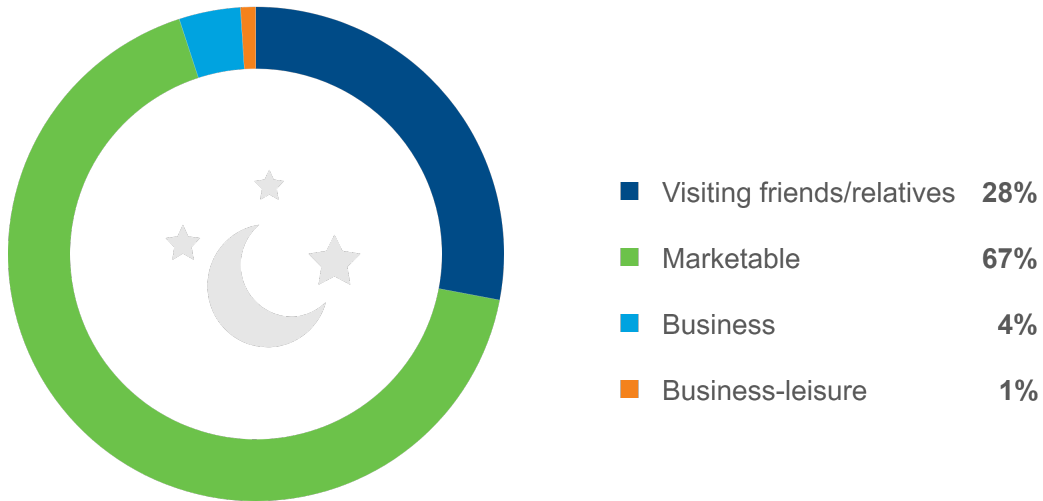
Main Purpose of Leisure Trip

	2023	2022
Visiting friends/ relatives	37%	28%
Touring	13%	18%
Special event	10%	8%
Outdoors	9%	6%
Shopping	9%	7%
City trip	6%	12%
Casino	4%	3%
Theme park	2%	4%

2023 Scottsdale Day Trips



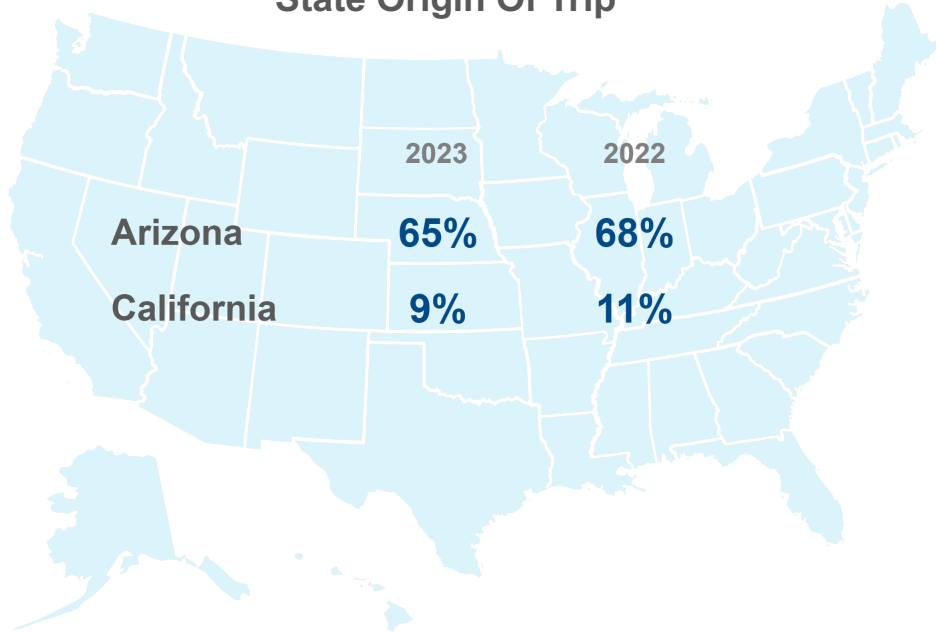
Last Year's Scottsdale Day Trips



Scottsdale's Day Trip Characteristics

Base: 2023 Day Person-Trips

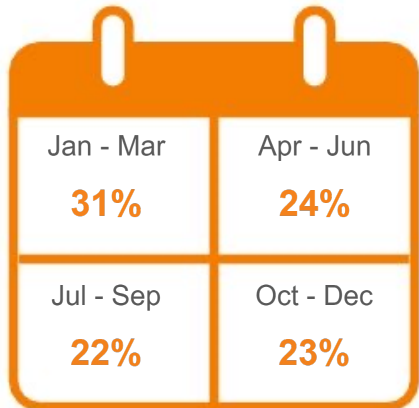
State Origin Of Trip



DMA Origin Of Trip

	2023	2022
Phoenix, AZ	55%	61%
Tucson (Nogales), AZ	8%	6%
Los Angeles, CA	6%	6%
New York, NY	3%	2%
Sacramento-Stockton-Modesto, CA	3%	2%

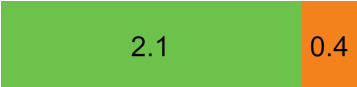
Season of Trip Total Day Person-Trips



Size of Travel Party

■ Adults ■ Children

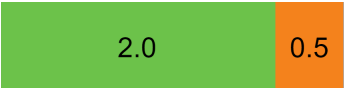
Scottsdale



Total **2.6**

Average number of people

U.S. Norm



Total **2.6**

Average number of people



21% of travel parties had a travel party member that required accessibility services

U.S. Norm: **15%**



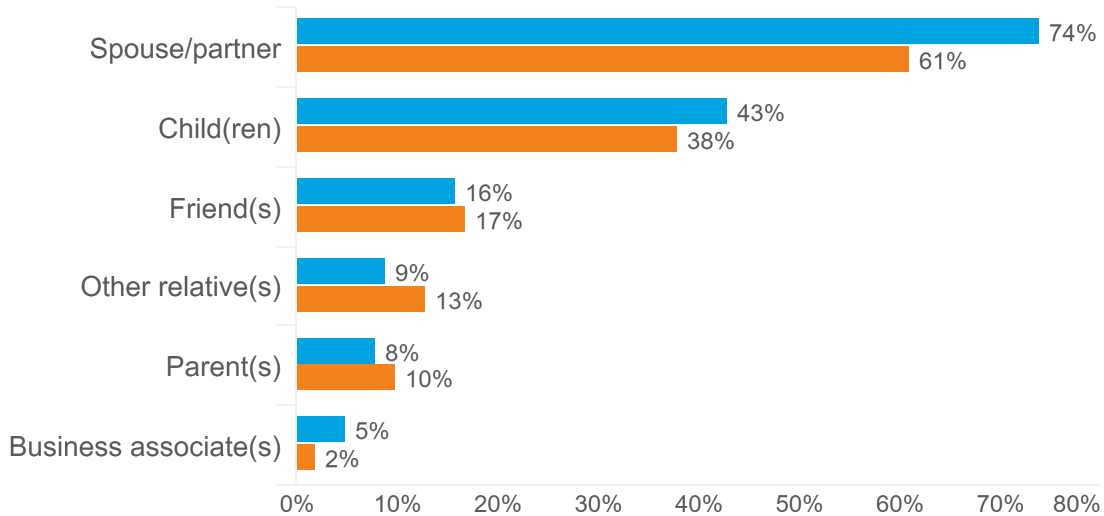
28% of trips only had one person in the travel party

U.S. Norm: **25%**

Composition of Immediate Travel Party

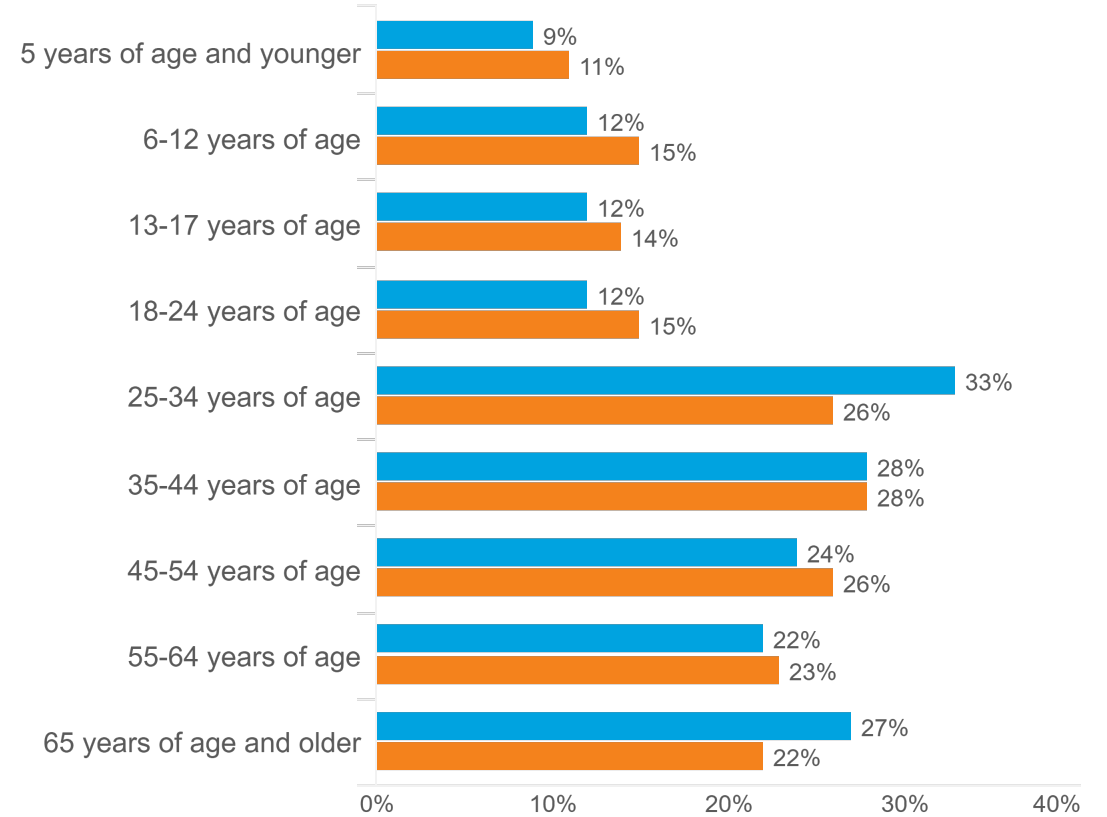
Base: 2023 Day Person-Trips that included more than one person

■ Scottsdale ■ U.S. Norm



Travel Party Age

■ Scottsdale ■ U.S. Norm



Activity Groupings

Outdoor Activities



U.S. Norm: 32%

Entertainment Activities



U.S. Norm: 40%

Cultural Activities



U.S. Norm: 20%

Sporting Activities



U.S. Norm: 14%

Business Activities








U.S. Norm: 10%

Activities and Experiences (Top 10)







	2023	2022
Shopping	29%	29%
Sightseeing	15%	15%
Casino	13%	12%
Landmark/historic site	12%	7%
Hiking/backpacking	12%	7%
Bar/nightclub	11%	14%
Attending celebration	11%	10%
Local parks/playgrounds	10%	7%
Museum	10%	12%
Zoo	8%	7%

Shopping Types on Trip

Base: 2023 Day Person-Trips that included Shopping

	Scottsdale	U.S. Norm
 Outlet/mall shopping	50%	45%
 Shopping at locally owned businesses	44%	42%
 Convenience/grocery shopping	37%	26%
 Souvenir shopping	27%	23%
 Big box stores (Walmart, Costco)	27%	26%
 Farmers market	17%	13%
 Antiquing	13%	12%

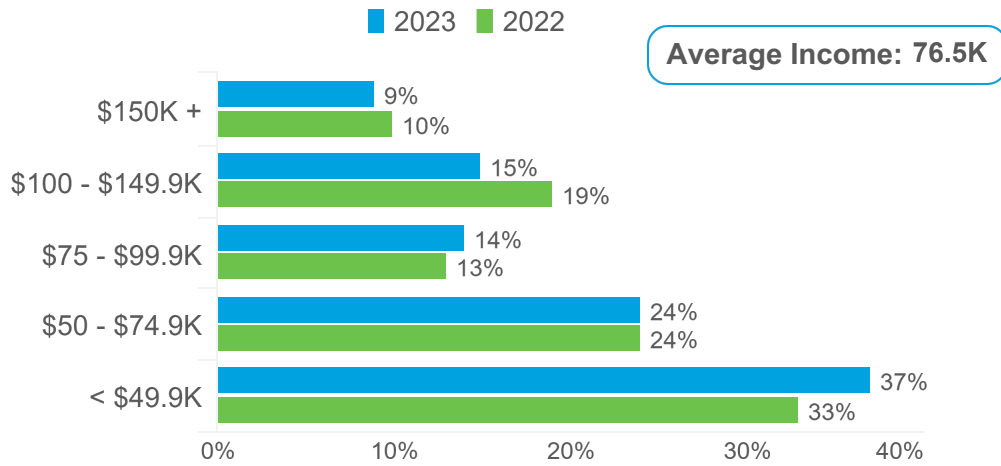
Dining Types on Trip

	Scottsdale	U.S. Norm
 Casual dining	50%	43%
 Fast food	36%	39%
 Unique/local food	26%	20%
 Carry-out/food delivery service	12%	12%
 Fine/upscale dining	11%	10%
 Picnicking	9%	9%

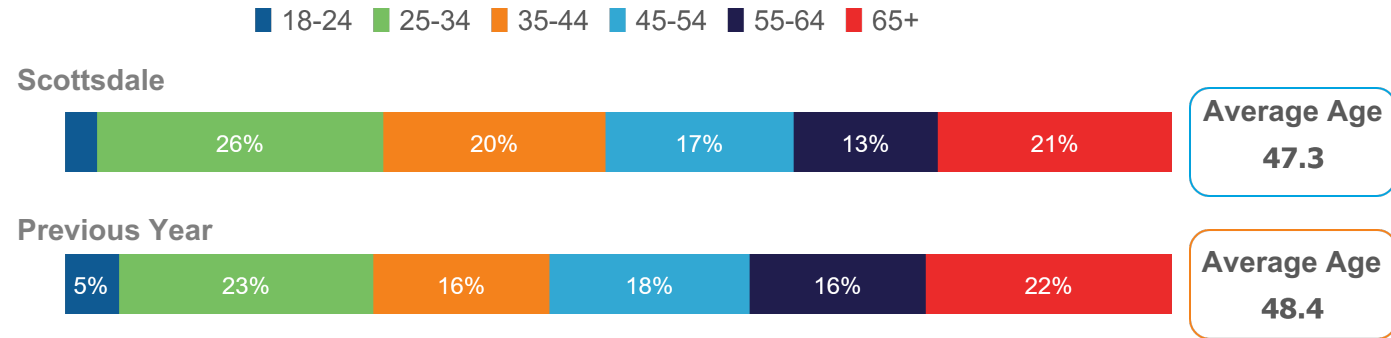
Demographic Profile of Day Scottsdale Visitors

Base: 2023 Day Person-Trips

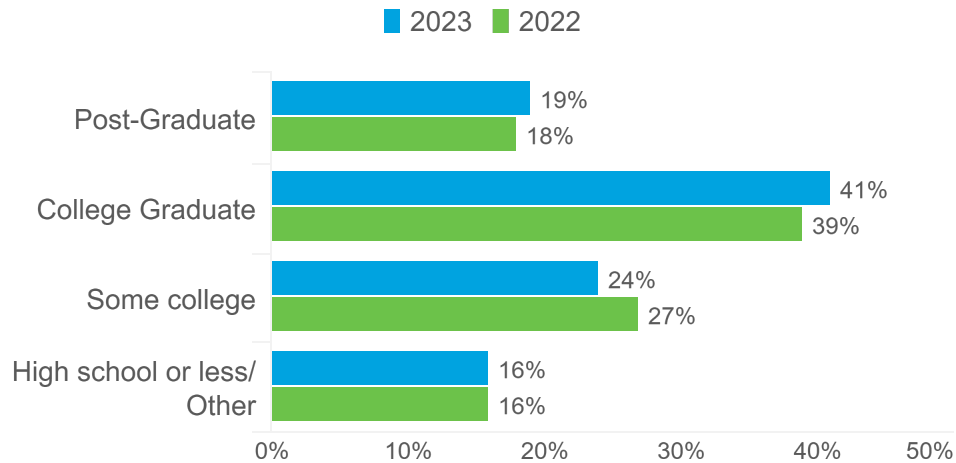
Household Income



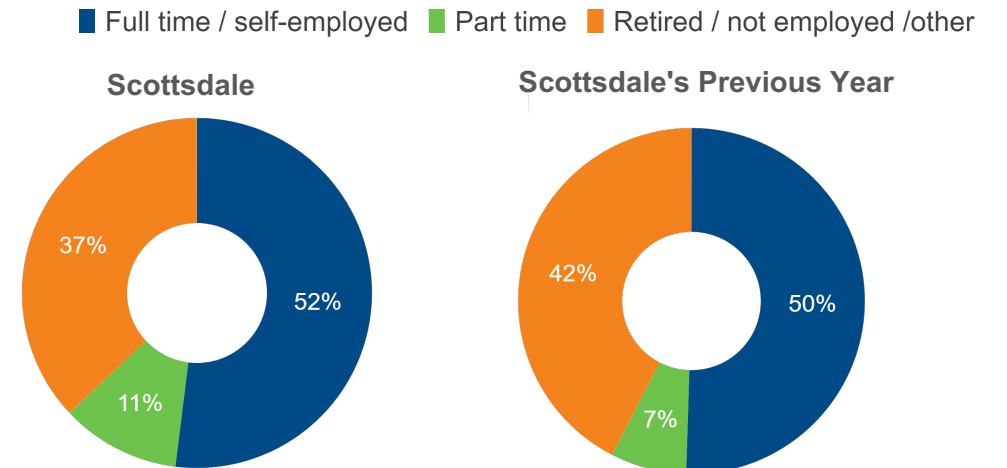
Age



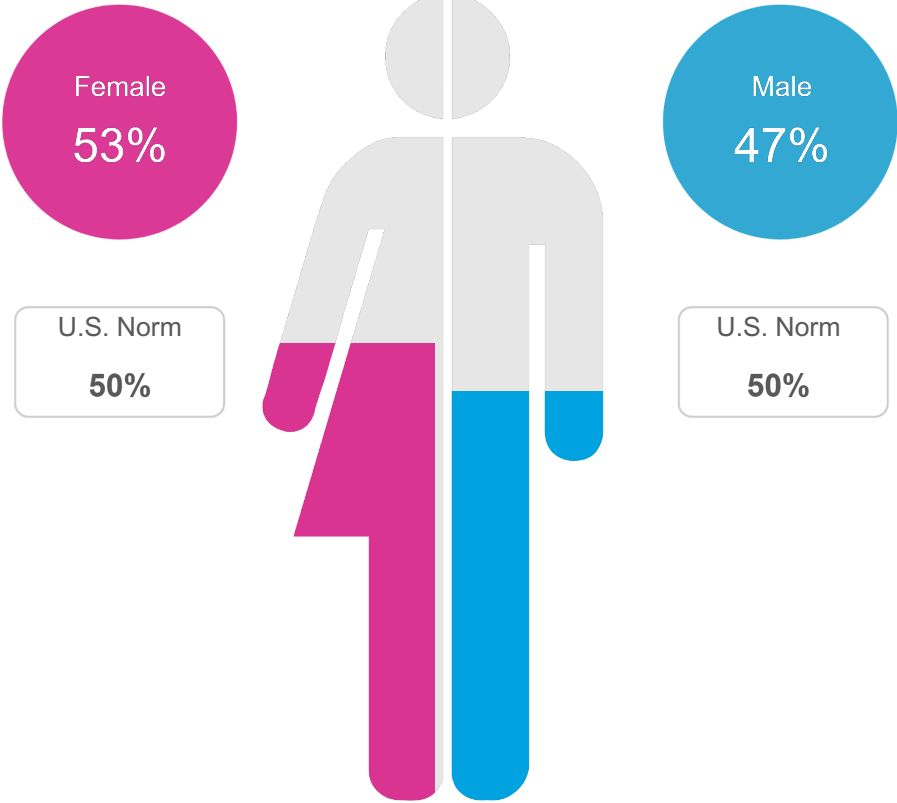
Educational Attainment



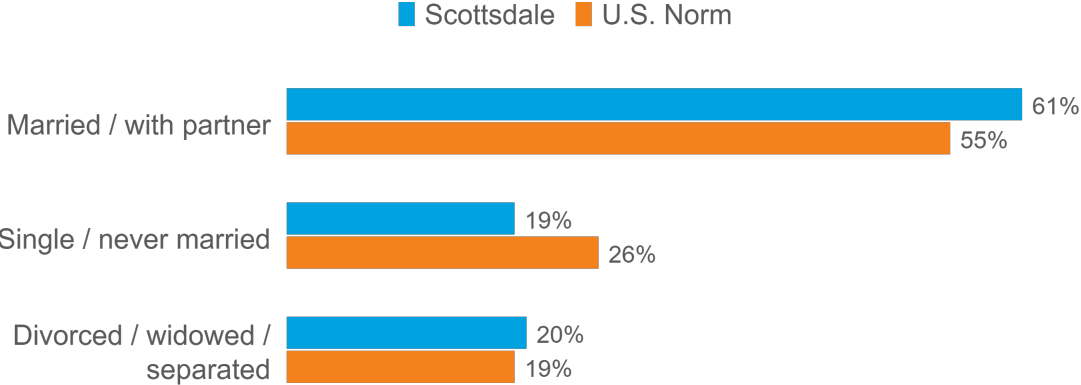
Employment



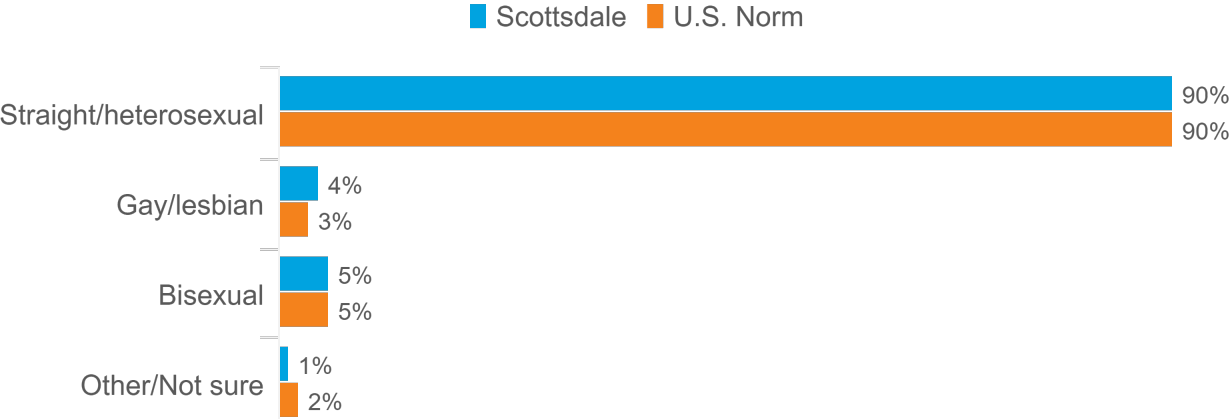
Gender



Marital Status

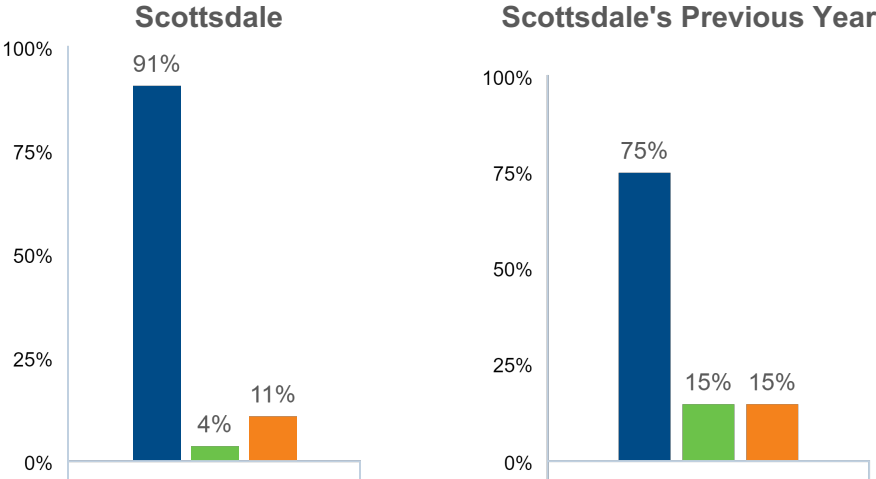


Sexual Orientation



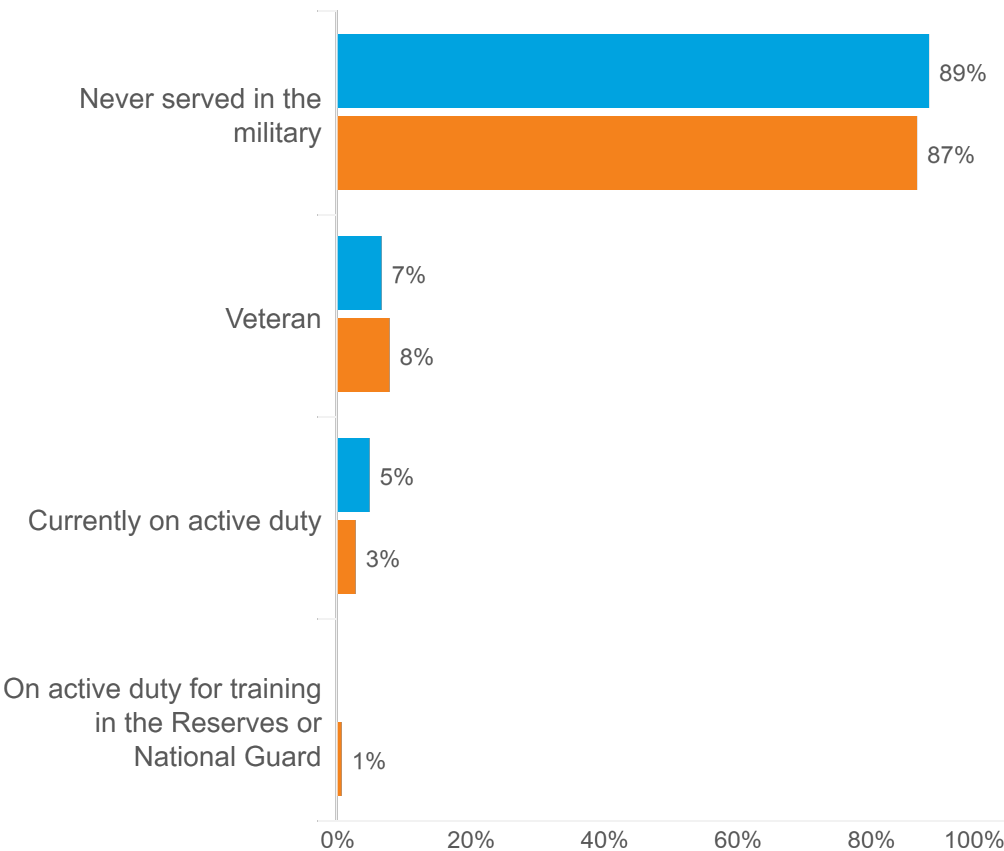
Race

White African-American Other



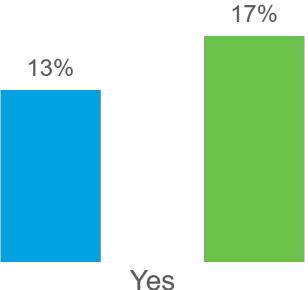
Military Status

Scottsdale U.S. Norm

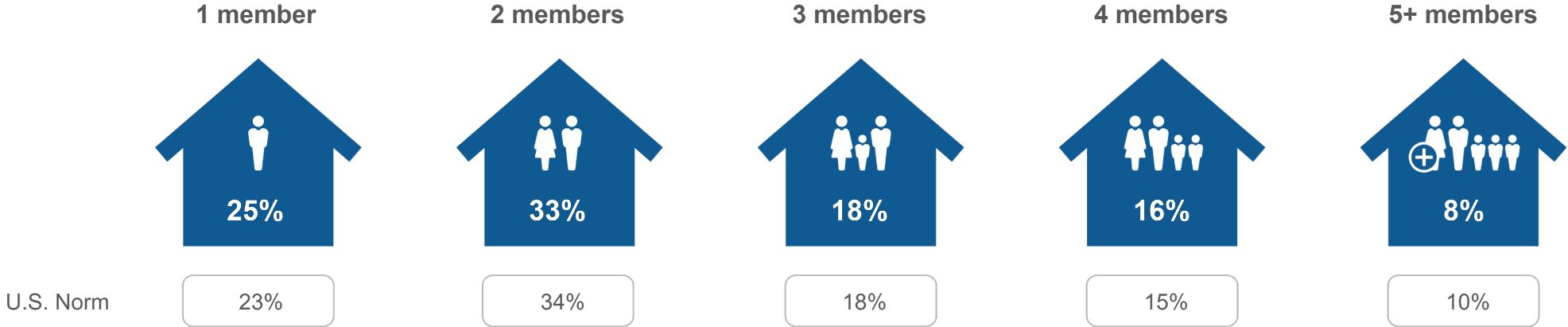


Hispanic Background

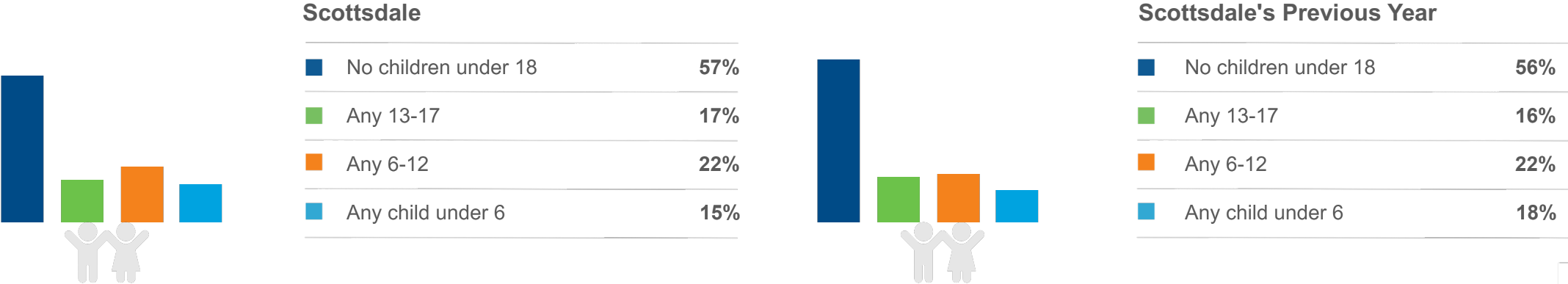
2023 2022



Household Size



Children in Household



C  M P A S S

Longwoods
INTERNATIONAL