

BRAND RESEARCH



SCOTTSDALE
ARIZONA

OVERVIEW

In the first quarter of 2015, Experience Scottsdale embarked on a major research initiative to gain a fresh perspective on the Scottsdale tourism brand. The research gathered feedback from key tourism stakeholders, previous visitors and potential visitors to better understand current brand awareness and perceptions as well as traveler motivations.

This research and analysis phase served as the first step in refining the brand for greater appeal. This brand platform clearly outlines the core essence of the brand (what Scottsdale offers), points of competitive differentiation (what is uniquely Scottsdale's), and prospective visitors' motivations (what matters). To accurately hone in on these critical aspects of the brand, the research included quantitative and qualitative feedback.

RESEARCH APPROACH

- **Brand Audit:** Multi-disciplinary team review of existing Experience Scottsdale brand materials
- **Stakeholder Discovery:** 280 in-person and online interviews of Scottsdale tourism and community stakeholders
- **Visitor Focus Groups:** 80 total participants in four key feeder markets – Chicago, Denver, Los Angeles, New York City
- **Visitor Online Survey:** 1,915 online surveys with previous and prospective U.S. and Canadian visitors

FOCUS GROUPS & ONLINE SURVEYS

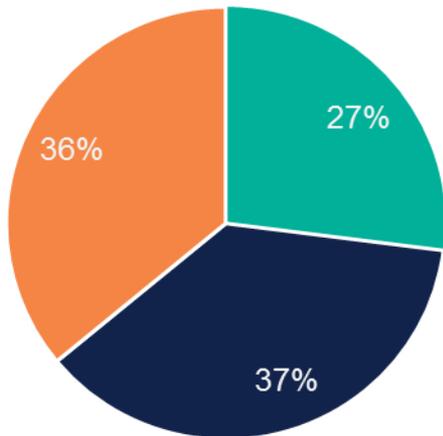


SCOTTSDALE
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SCREENER QUALIFICATIONS

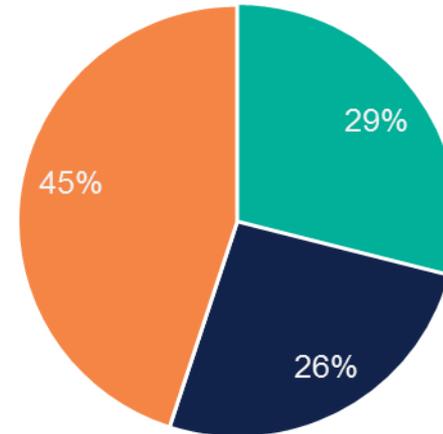
Age Distribution

■ 18-34 ■ 35-54 ■ 55+



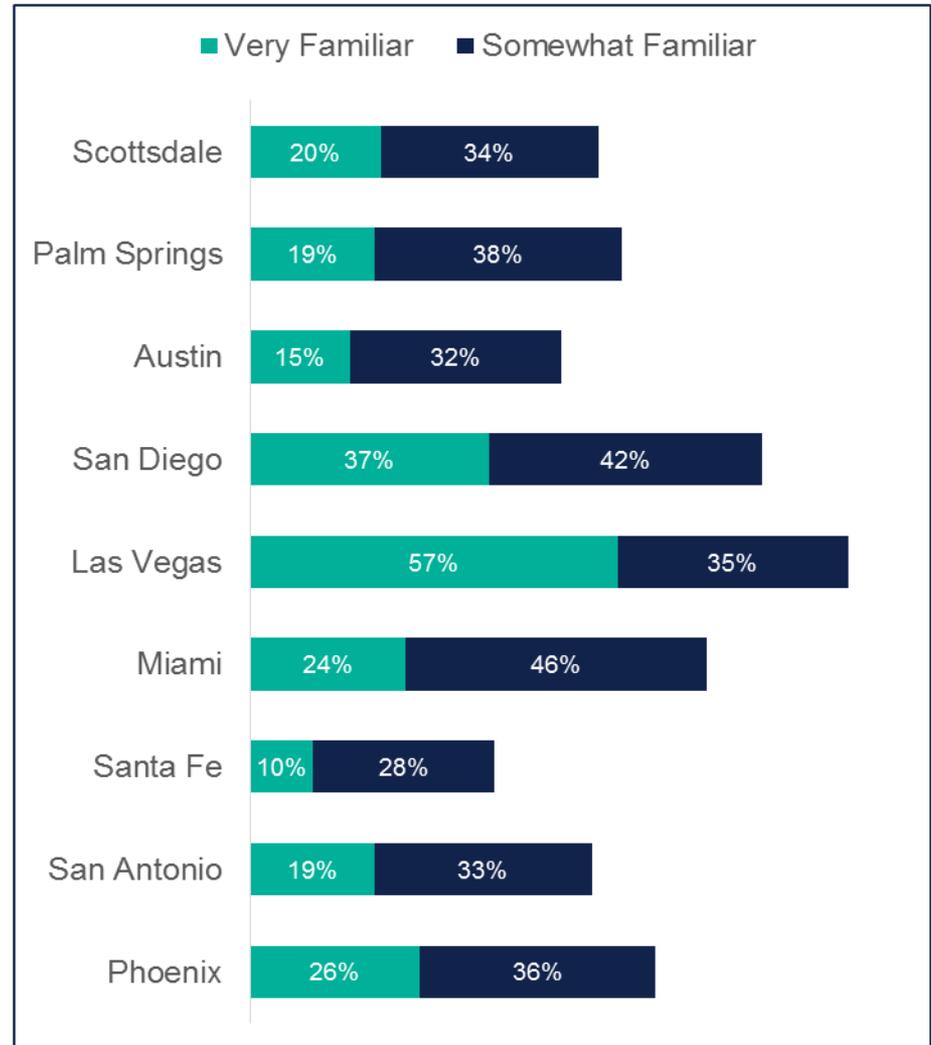
Income Distribution

■ \$50-75k ■ \$76-99k ■ \$100k+



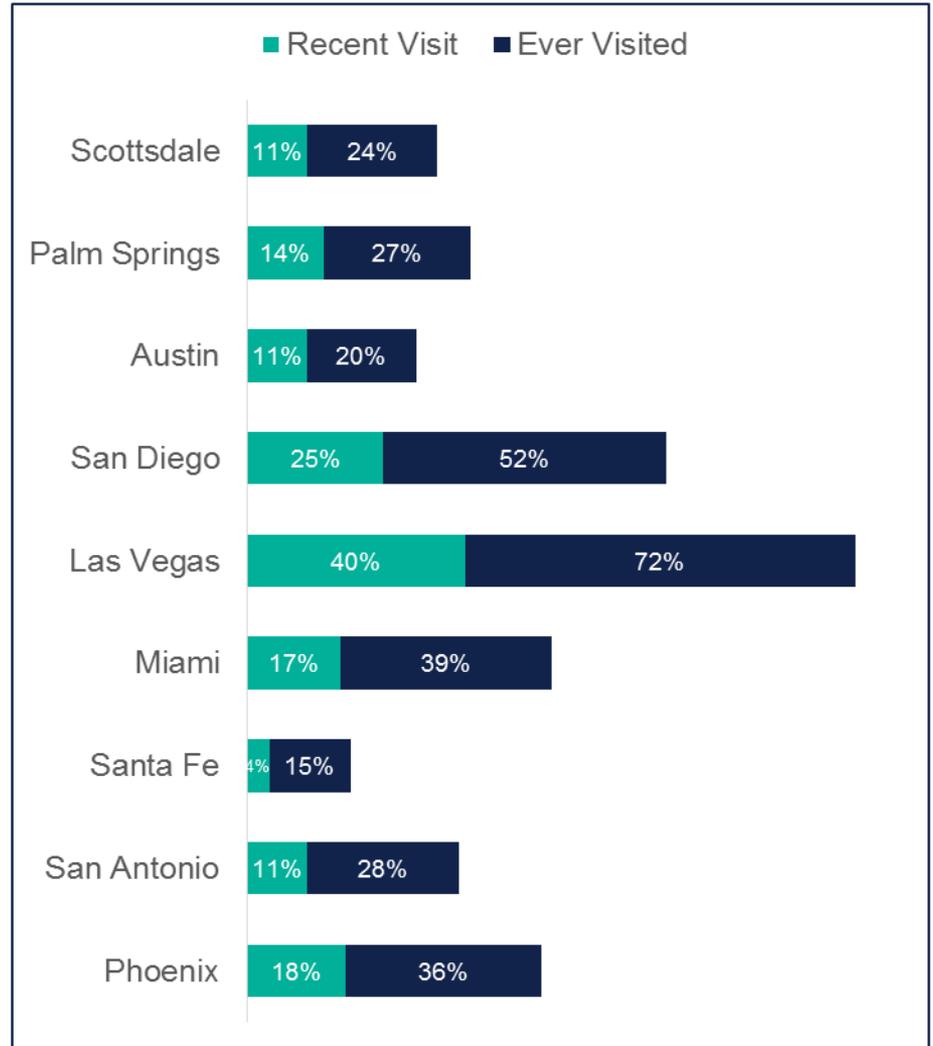
FAMILIARITY WITH DESTINATIONS

- Before consumers consider visiting a destination, they develop some familiarity with what it has to offer. Familiarity is typically the first step in the decision process.
- Just over half the respondents were familiar with Scottsdale. Major destinations such as Las Vegas and San Diego have much higher familiarity. Consumers also are more familiar with Phoenix.
- Of concern is that familiarity with Palm Springs is higher than Scottsdale. This is the most similar destination to Scottsdale.



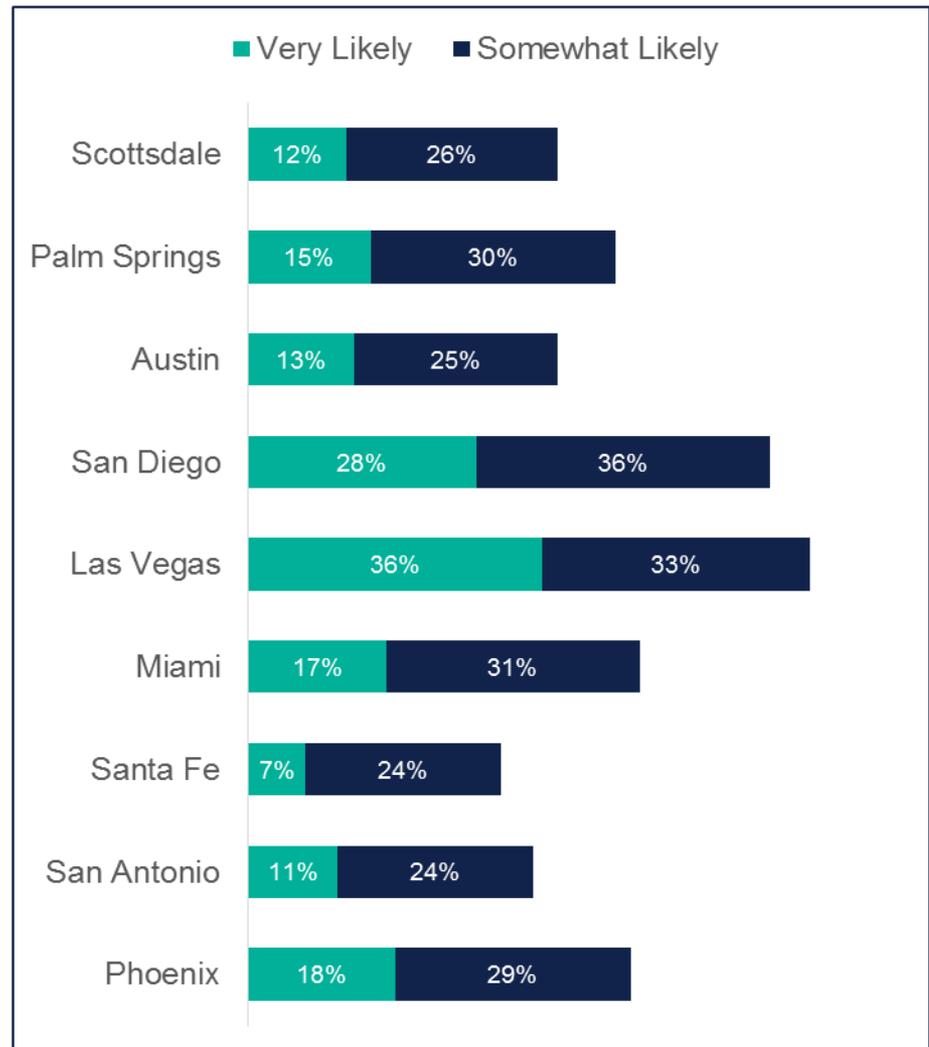
PAST VISITATION

- Visitation to the competitive set varies widely. Almost three-quarters of the respondents report past travel to Las Vegas, and half to San Diego.
- The other major cities – Miami and Phoenix – were visited by more than a third of the respondents.
- Scottsdale falls into the third tier with smaller destinations such as Palm Springs, Austin, San Antonio and Santa Fe. About a quarter of the respondents have visited Scottsdale and only 11% have visited in the past three years.



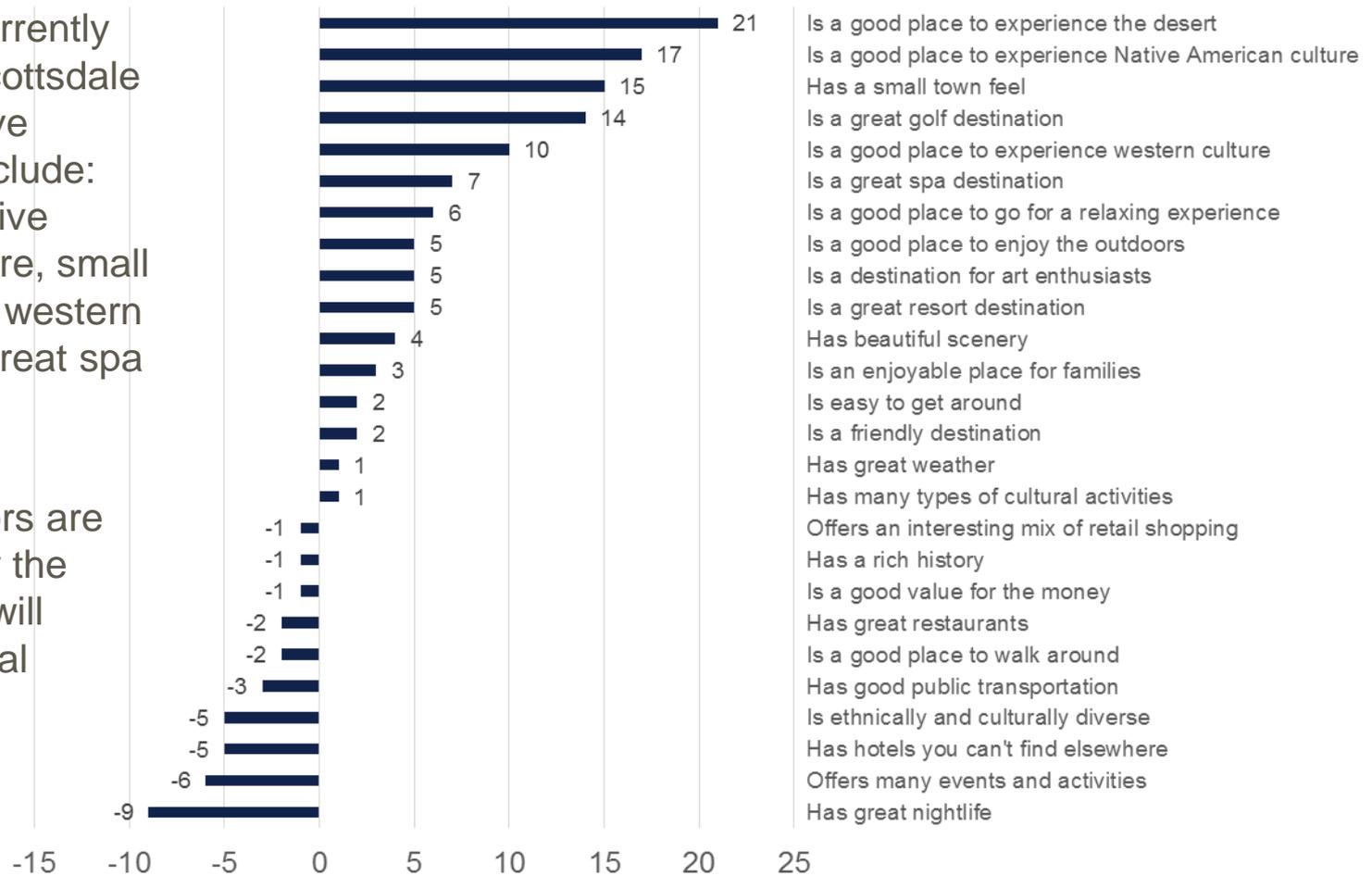
INTENT TO VISIT

- Intent to visit is a key measure for future performance.
- Las Vegas and San Diego are much more popular than the other options. There are three destinations where almost half of the consumers indicate intent to visit: Miami, Phoenix and Palm Springs.
- Only 38% indicate intent to visit Scottsdale, which is comparable to Austin, San Antonio and Santa Fe.



TRAVELERS' RATINGS OF SCOTTSDALE

- Factors that currently differentiate Scottsdale from competitive destinations include: the desert, Native American culture, small town feel, golf, western culture and a great spa destination.
- But these factors are not necessarily the attributes that will attract additional visitation.



KEY DRIVERS FOR TRAVELERS

- This list ranks the attributes in terms of which generate stronger interest in visiting.
- The top attributes are great restaurants, a good place to walk around, enjoyable for families, and retail shopping.
- The attributes that have the smallest impact include some of those where Scottsdale is highly rated – a good place to experience Native American culture, and a good place to experience the desert.

1	Has great restaurants
2	Is a good place to walk around
3	Is an enjoyable place for families
4	Offers an interesting mix of retail shopping
5	Has great nightlife
6	Is a great resort destination
7	Is a friendly destination
8	Is a good place to go for a relaxing experience
9	Offers many events and activities
10	Has many types of cultural activities
11	Is a good place to enjoy the outdoors
12	Has great weather
13	Has a rich history
14	Is a destination for art enthusiasts
15	Has beautiful scenery
16	Has hotels you can't find elsewhere
17	Is a good value for the money
18	Is a great spa destination
19	Is easy to get around
20	Is a good place to experience western culture
21	Is ethnically and culturally diverse
22	Has good public transportation
23	Is a great golf destination
24	Has a small town feel
25	Is a good place to experience the desert
26	Is a good place to experience Native American culture

WHAT IS IMPORTANT TO CONSUMERS?



MILLENNIAL-SPECIFIC FINDINGS

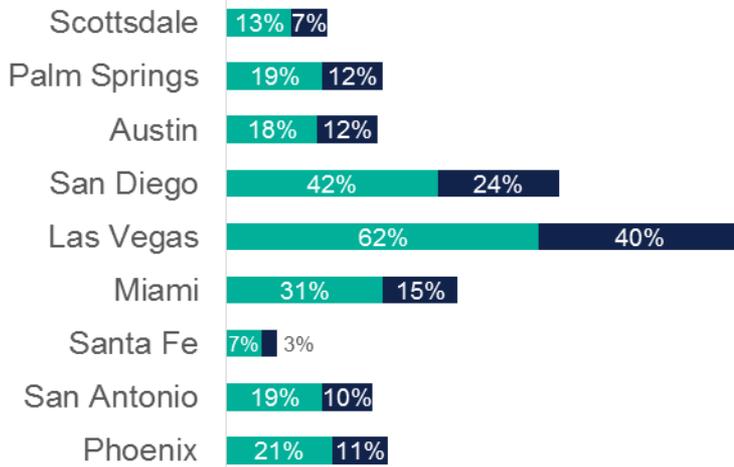


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MILLENNIAL VISITATION

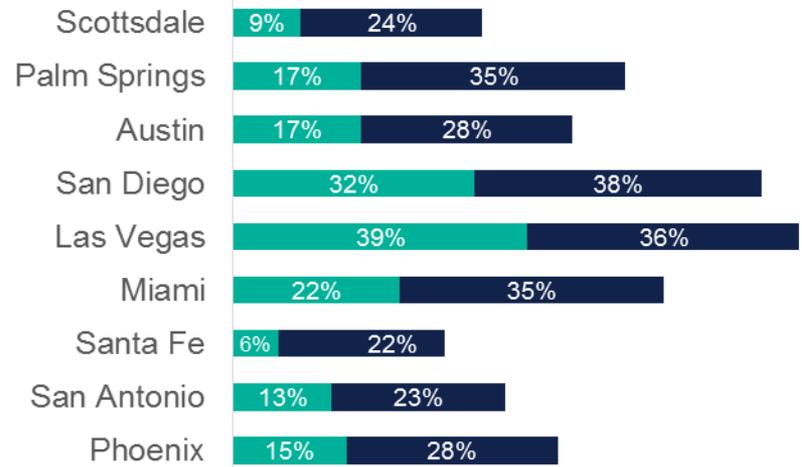
Past Visitation

■ Ever Visited ■ Recent Visit



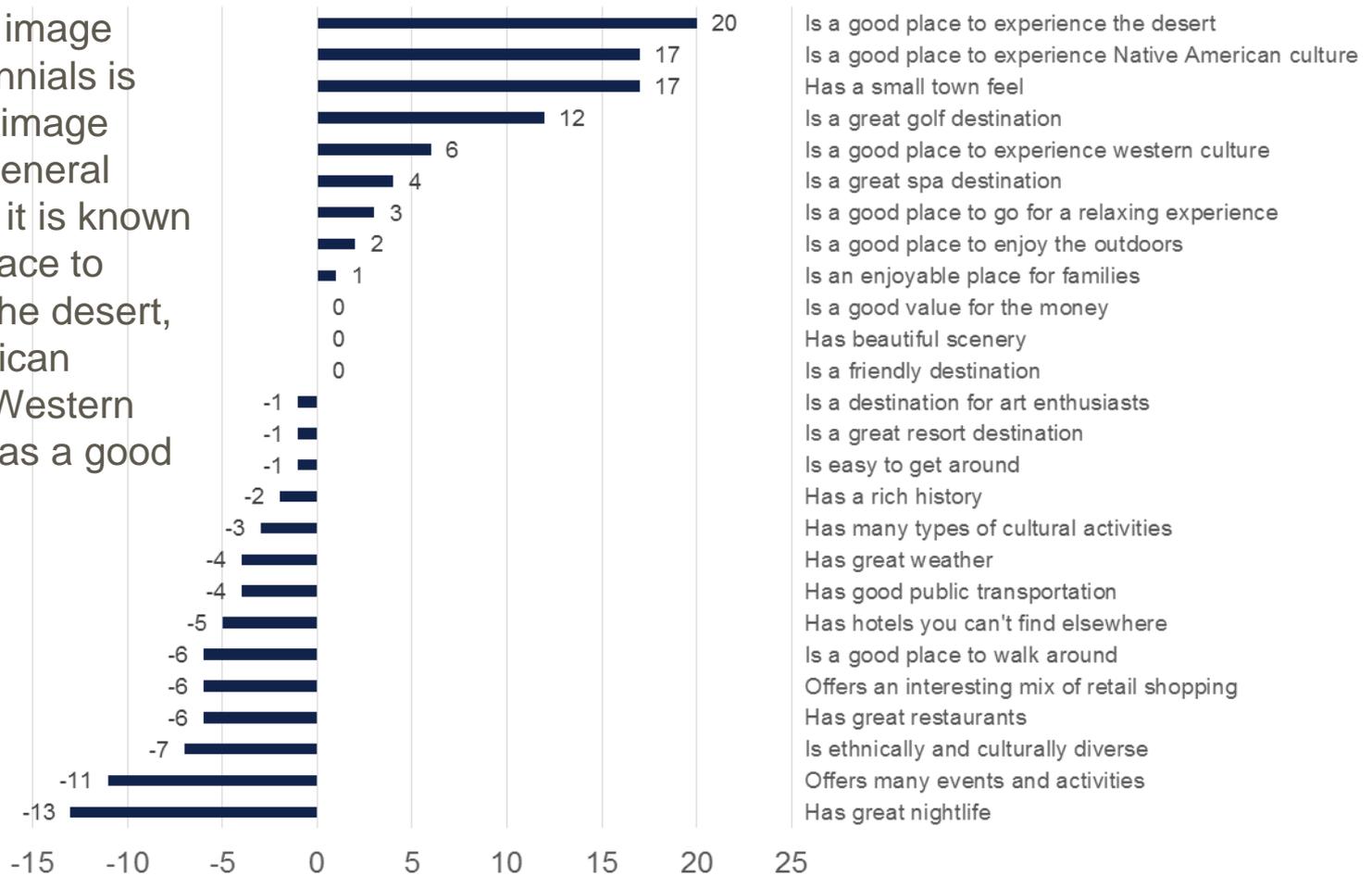
Intent to Visit

■ Very Likely ■ Somewhat Likely



MILLENNIALS' RATINGS OF SCOTTSDALE

- Scottsdale's image among Millennials is similar to its image among the general population – it is known as a good place to experience the desert, Native American culture and Western culture, and as a good golf and spa destination.



KEY DRIVERS FOR MILLENNIALS

- The attributes that generate the strongest interest for Millennials to visit include a mix of amenities – restaurants, events and activities, nightlife and retail, but also a place to relax.
- Some of the attributes most associated with Scottsdale – Native American and western culture, and a good place to enjoy the desert are at the bottom of the list in terms of motivation.

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WHAT IS IMPORTANT TO MILLENNIAL CONSUMERS?



KEY TAKEAWAYS & INSIGHTS



SCOTTSDALE
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THE IMPORTANCE OF BRAND AUTHENTICITY

- Brand authenticity is a key driver of brand choice, especially for Millennials.
- Authenticity is achieved by demonstrating:
 - Continuity/consistency – being faithful to the brand itself
 - Credibility – being true to your consumers
 - Integrity – motivated by caring and responsibility

BROADEN THE OFFERING

- The current view of Scottsdale is a relaxed, outdoor destination. This is appealing but needs to be expanded to highlight the beauty of the desert, the many activities available, and the vibrancy of the area, including restaurants, shopping and nightlife.
- Scottsdale can create a new position that will build on its existing strength as a good place to have a desert experience with action and adventure.

THE DESERT IS NOT AN IMMEDIATE, CLEAR BENEFIT

- While our setting is one of our most unique differentiators, some education is still needed about the desert. Messaging and images using the desert can motivate interest. The challenge is to ensure visitors see the desert as positive, inspiring and beautiful – instead of dry or barren.
- Heat is a perception issue, and “Sonoran Desert” doesn’t automatically convey a compelling desert experience for everyone.

“If it’s the desert, then that’s hot and not enjoyable.”

“That isn’t what the desert looks like – that looks so fake.” (in response to current ad campaign)

THE POWER OF REVITALIZATION

- When selecting a destination, Scottsdale's ideal visitor desires getting away from the stress of everyday life. This does not mean they seek only total spa serenity or only a high-octane adventure, but a combination of both. A variety of experiences provides visitors something different than the ordinary. The destination offers an effortless way to find the intersection of both, and Scottsdale can own this space.
- An interesting, untapped combination: adventure + relaxation = revitalization.

"I want adventure and I want to relax. Just not at the same time. A vacation needs to be different from what my typical day is. A balance of adventure and relaxation help 'unscrew' my brain."

"Excitement is just something different from my everyday life."

"I want to leave there feeling energized by the experience and maybe feeling some inspiration from having discovered something new."

CULTURE & HISTORY ARE A PLUS, BUT NOT A PRIMARY DRAW

- We are not considered a primary destination for culture and history. If this is what travelers are looking for in a destination, they will most likely go elsewhere.
- Culture and history are something visitors experience while here, but they are not the primary reasons for coming to Scottsdale.

“I don’t want to be hit over the head with history stuff when I take a trip... it’s not the reason I take a vacation.”

“We like to do that kind of thing as a family, but it’s just an add-on kind of activity.”

STIRRING BEAUTY, NATURAL & OTHERWISE

- Scottsdale is a place of stirring beauty, natural and otherwise.
- Outdoor, natural beauty is broadly appealing across audience segments.
- There's more opportunity to tap into the destination's unique and natural beauty.

“Scottsdale is one of the most beautiful places I’ve ever been.”

“It’s a land of beauty – including the people.”

“No place is as uniquely beautiful as Scottsdale. Even the light is prettier there.”

CLARITY OF FOCUS

- Visitors are advertising-savvy and sensitive to being shown too much.
- There is actually clear “something for everyone” backlash.
- We need to stay grounded in the role of advertising in the traveler decision journey – inspiration.

“There’s too much stuff going on in the ads. That doesn’t look fun; it looks like a lot of pressure to do too much.” (in response to a competitive destination ad)

“You just need to get me excited to come there and show me I’m going to have a great time, you don’t have to show me everything.”

NEED FOR GREATER AWARENESS

- Scottsdale's primary branding challenge is to refine the brand image, increase brand awareness, and create a stronger point of differentiation from competition, primarily from Palm Springs.

"A lack of knowledge is really what keeps us from going. I just don't think about it."

"It seems like a place I'd really like, I just haven't considered it."

A FEW MORE TAKEAWAYS

- Golf continues to drop in terms of broad interest, but is a major asset in niche advertising to the avid golf target. Showing it as a primary activity tends to brand a destination as older and more expensive.
- Our audience wants to see other people enjoying a destination in ads; showing groups of people versus individuals alone.
- Age of residents is less of an issue; younger audiences are actually less likely to think of Scottsdale as a place for retirement.

MILLENNIAL-SPECIFIC TAKEAWAYS

- Millennials have an even less defined view of the area and need more information. What they want is similar to other consumers; they just are more focused on a place that is vibrant, active and fun.
- They perceive Scottsdale as a good place for golf and spa experiences and as a relaxing place. But they don't feel it offers the fun and vibrancy they want – the restaurants, retail, nightlife and events.

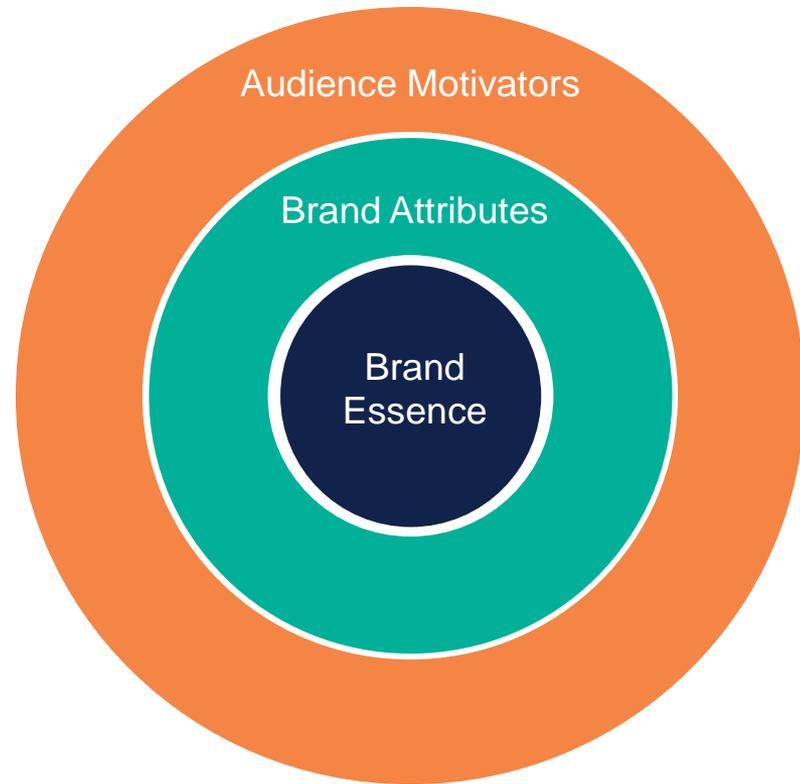
BRAND POSITIONING



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BRAND POSITIONING MODEL

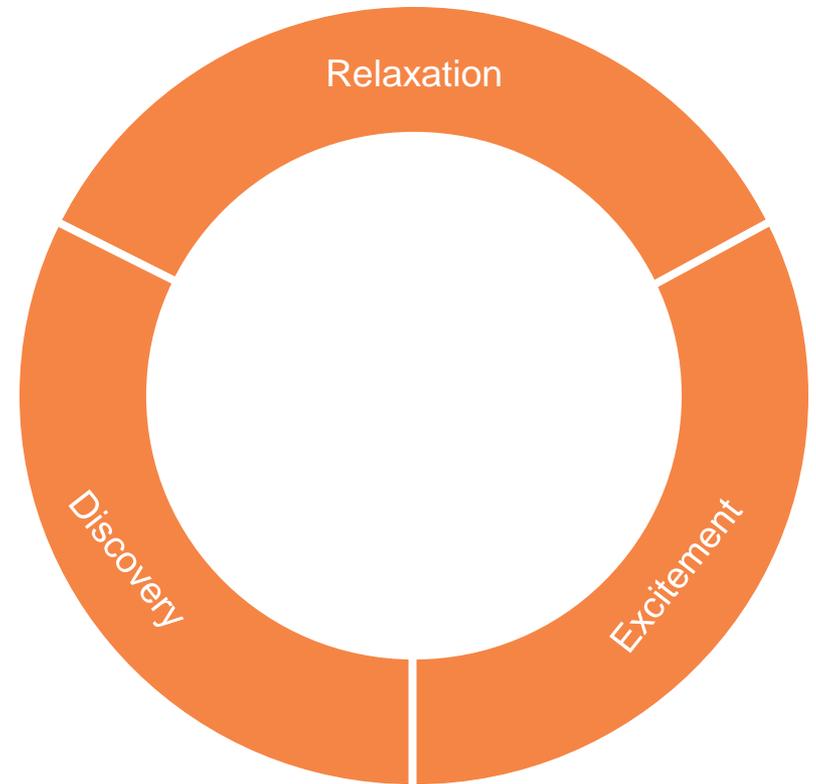
- **Audience Motivators:**
Anchor all messaging by what our audience wants and needs to hear.
- **Brand Attributes:**
Key in on our unique strengths and abilities to meet those audience needs.
- **Brand Essence:**
Motivators + Brand Attributes.
This is our unique and relevant brand essence.



Finding Your Point of Strength

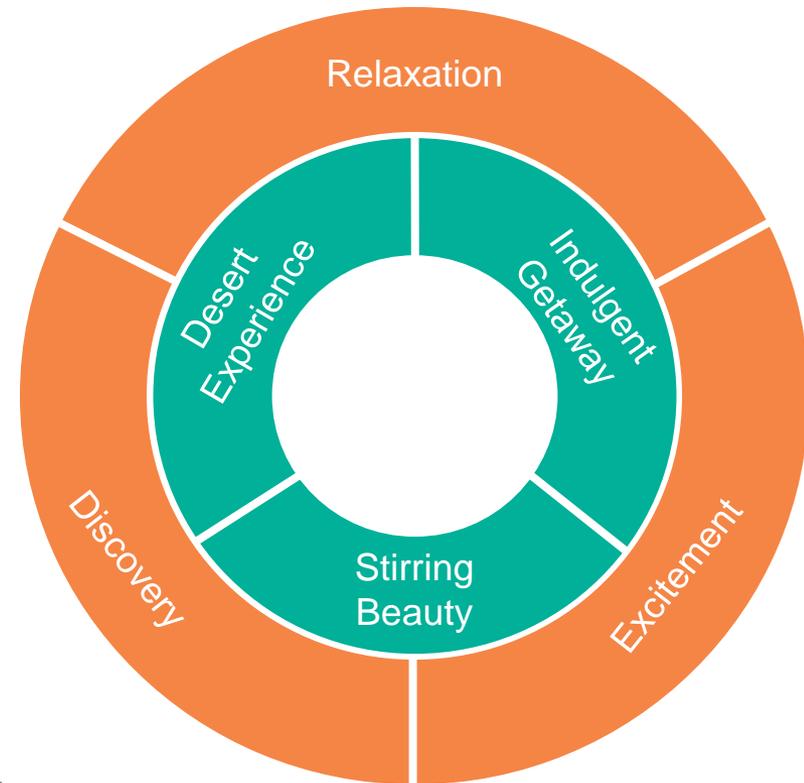
AUDIENCE MOTIVATORS

- **Relaxation:** *“I take a vacation to get away from the stress of everyday life. Just having a change of scenery and easy access to a variety of activities helps me find the relaxation I want and need.”*
- **Excitement:** *“Adventure and excitement don’t have to mean high-octane thrills, they just need to be something different from my everyday life. I want to leave feeling energized and inspired by the experience of doing something new.”*
- **Discovery:** *“I am motivated by being exposed to new things. Discovering something unexpected makes me feel reconnected to my companions, to myself and to the world. I leave feeling more engaged and more balanced.”*



BRAND ATTRIBUTES

- **Desert Experience:** *Whether it's simply the backdrop for your getaway or the primary reason for your visit, the unique vibrancy of Scottsdale's desert setting will inspire you in new and unexpected ways. With both adventure and serenity at your doorstep, you'll feel relaxed, reconnected and revitalized.*
- **Indulgent Getaway:** *Scottsdale is just the getaway you want and need: effortless, enjoyable, and a little indulgent. Scottsdale offers a variety of easy ways to take a break from the ordinary. You'll find the perfect balance of excitement and relaxation so you can return home feeling better than when you arrived.*
- **Stirring Beauty:** *There's a certain quality to the light in Scottsdale that bathes everything in stirring beauty. From the unexpected lushness of the blooming desert environment, to the clean sparkle of Scottsdale's resorts and downtown, to the bright smiles of the people – you'll take in all this beauty, and it will stir your soul.*



BRAND ESSENCE

- **Effortless Revitalization:**
Whether you're looking to unplug or get charged up, you leave Scottsdale feeling better than when you arrived.

