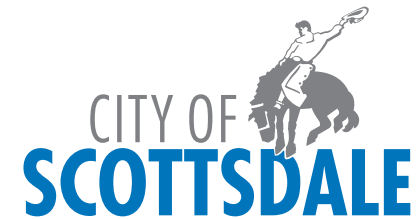




Travel USA Visitor Profile



2022

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 2022.

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 2022:



Overnight Base Size

983

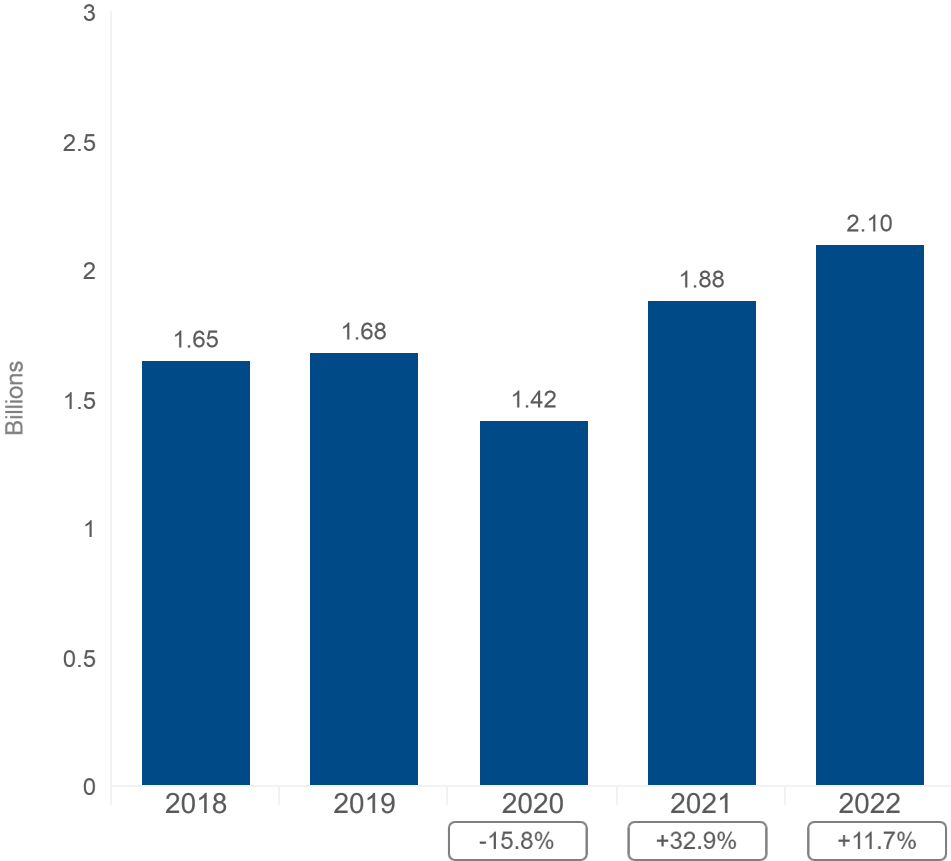


Day Base Size

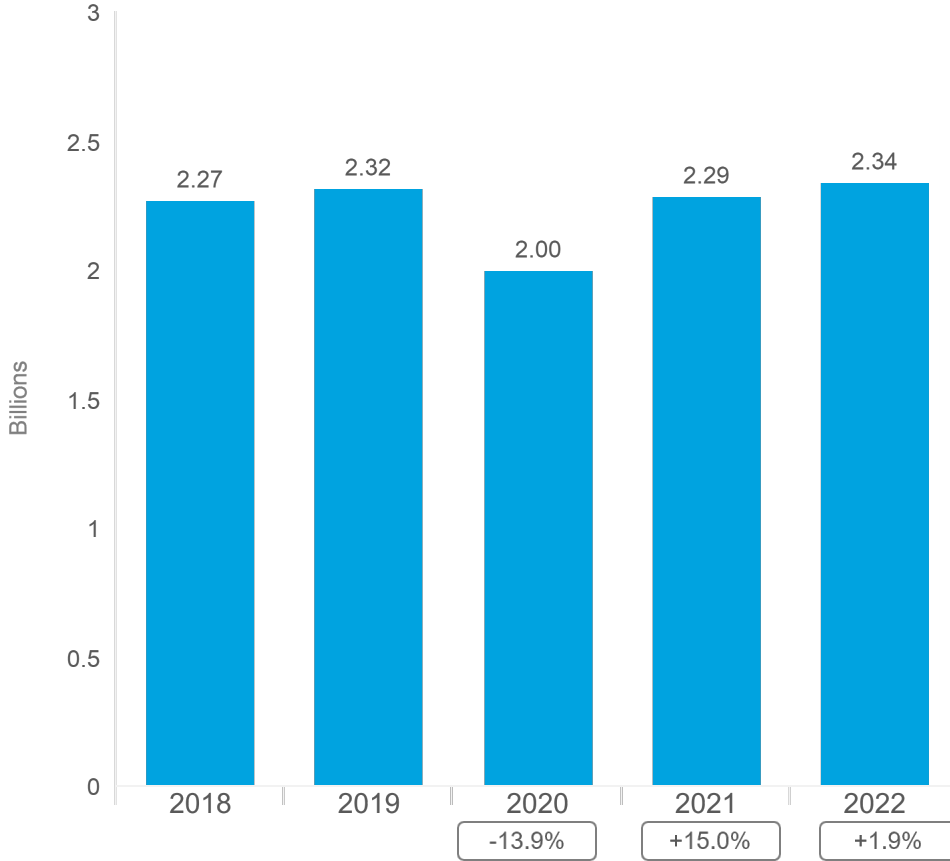
215

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

Total Size of U.S. Overnight Travel Market



Total Size of U.S. Day Travel Market

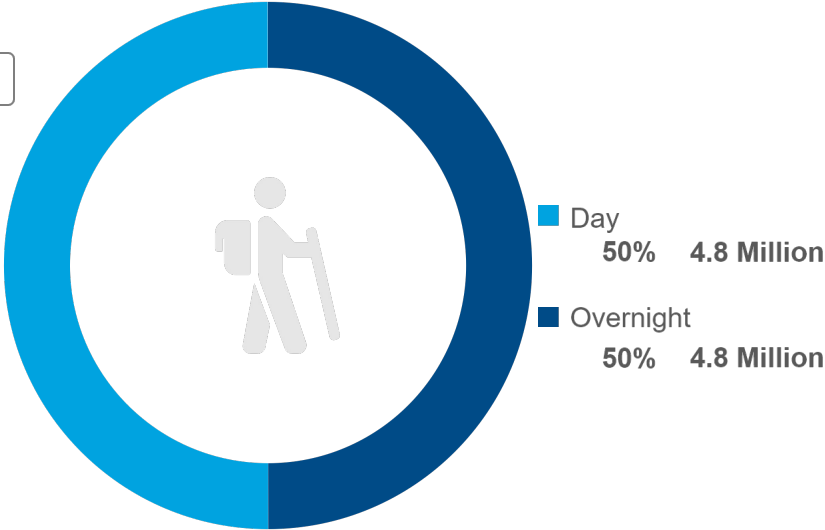


Total Size of Scottsdale 2022 Domestic Travel Market

Total Person-Trips

9.5 Million

+9.3% vs. last year

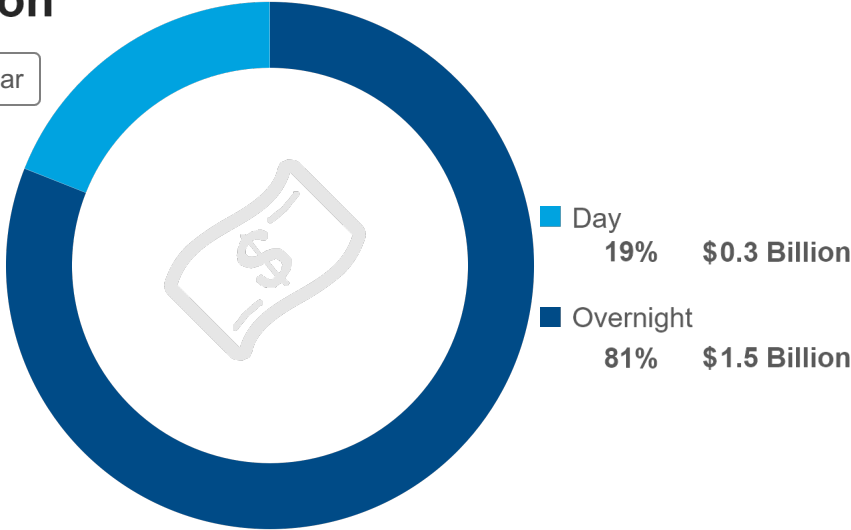


Total Expenditures for Scottsdale 2022 Domestic Travel Market

Total Spending

\$ 1.8 Billion

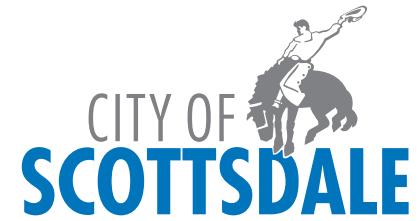
+24.8% vs. last year





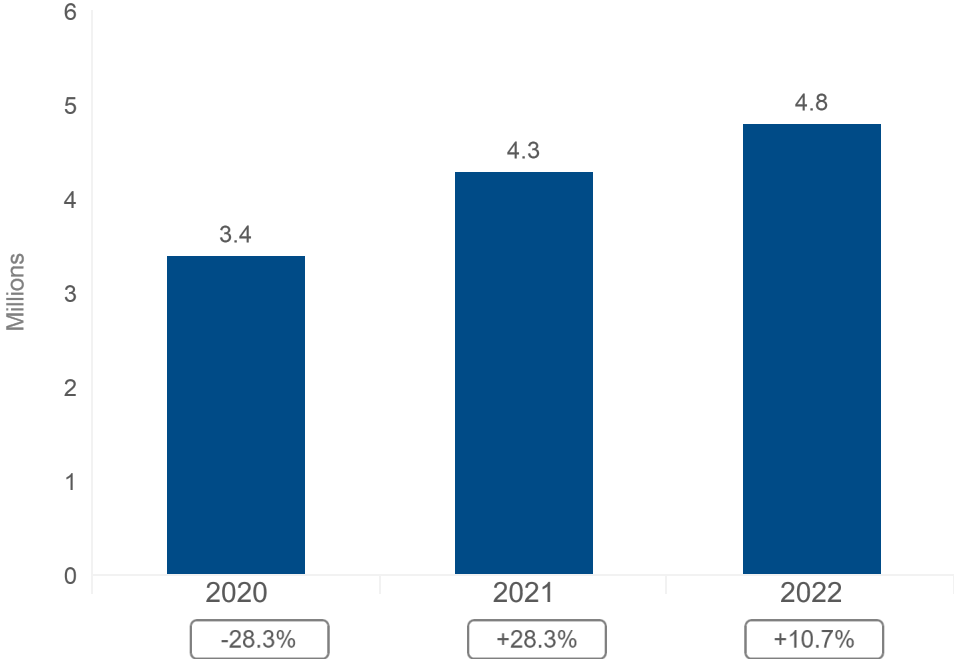
Travel USA Visitor Profile

Overnight Visitation



2022

Overnight Trips to Scottsdale



Past Visitation to Scottsdale

76% of overnight travelers to Scottsdale are repeat visitors

53% of overnight travelers to Scottsdale had visited before in the past 12 months

Domestic Overnight Expenditures - by Sector

Total Spending
\$ 1.487 Billion

+26.9% vs. last year



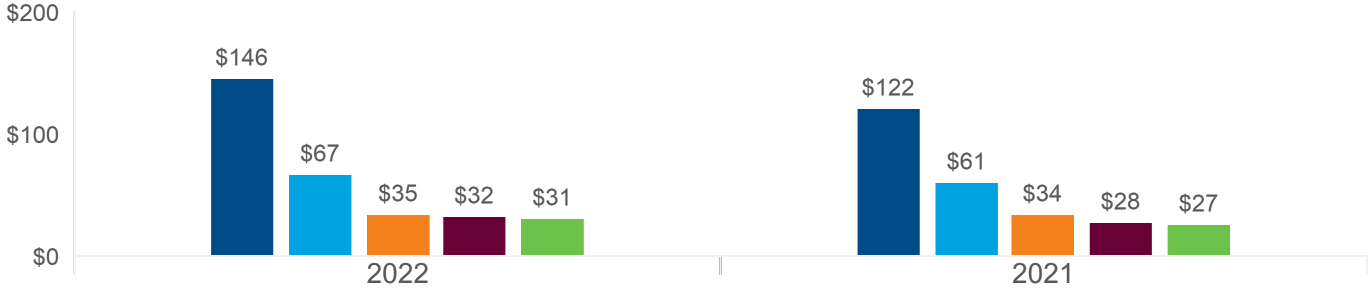
| | | |
|-------------------------------|-----|---------------|
| Lodging | 47% | \$697 Million |
| Transportation at Destination | 10% | \$148 Million |
| Restaurant Food & Beverage | 22% | \$322 Million |
| Retail Purchase | 11% | \$169 Million |
| Recreation/Entertainment | 10% | \$151 Million |

| vs. last year |
|---------------|
| +32.4% |
| +26.7% |
| +22.4% |
| +16.4% |
| +25.6% |

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

Average Per Person Per Trip: \$311

Last year: \$272














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

Average Per Person Per Trip:
 Leisure \$289

Scottsdale's Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

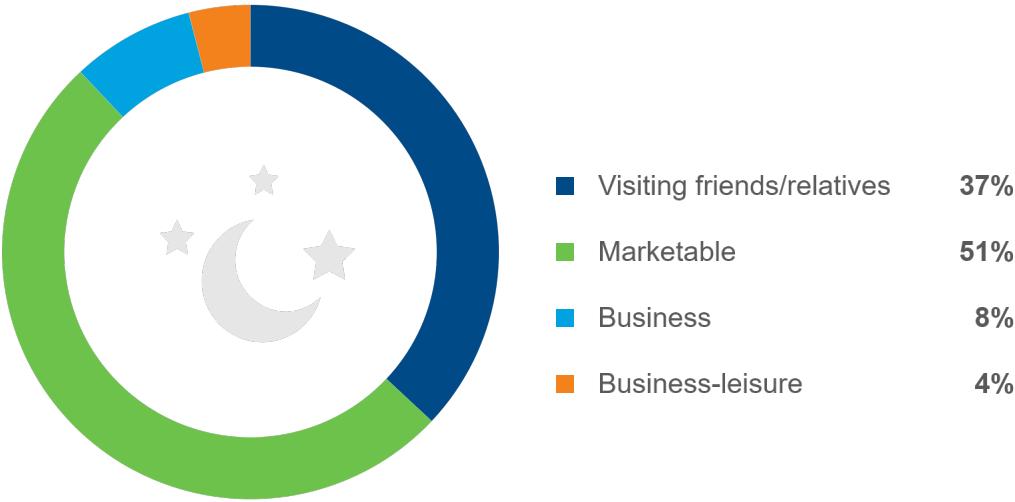
Main Purpose of Trip

| | |
|--|--|
|  37% Visiting friends/ relatives | |
|  13% Touring |  3% Conference/ Convention |
|  9% Special event | |
|  8% Outdoors | |
|  8% City trip |  5% Other business trip |
|  4% Casino | |
|  3% Resort |  4% Business-Leisure |
|  2% Golf Trip | |

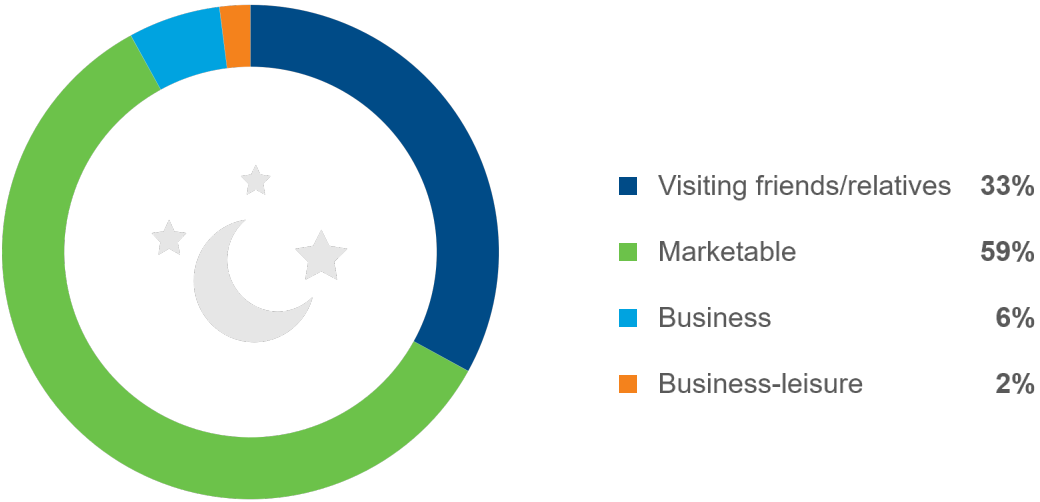
Main Purpose of Leisure Trip

| | 2022 | 2021 |
|-----------------------------|------------|------------|
| Visiting friends/ relatives | 37% | 33% |
| Touring | 13% | 13% |
| Special event | 9% | 9% |
| Outdoors | 8% | 13% |
| City trip | 8% | 9% |
| Casino | 4% | 4% |
| Resort | 3% | 4% |
| Golf Trip | 2% | 2% |

2022 Scottsdale Overnight Trips



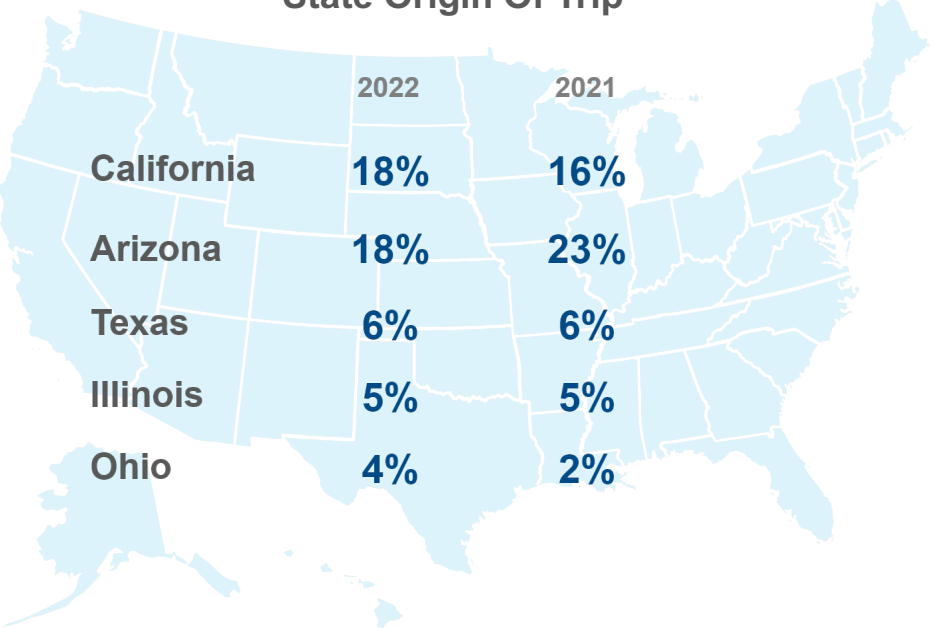
Last Year's Scottsdale Overnight Trips



Scottsdale's Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

State Origin Of Trip



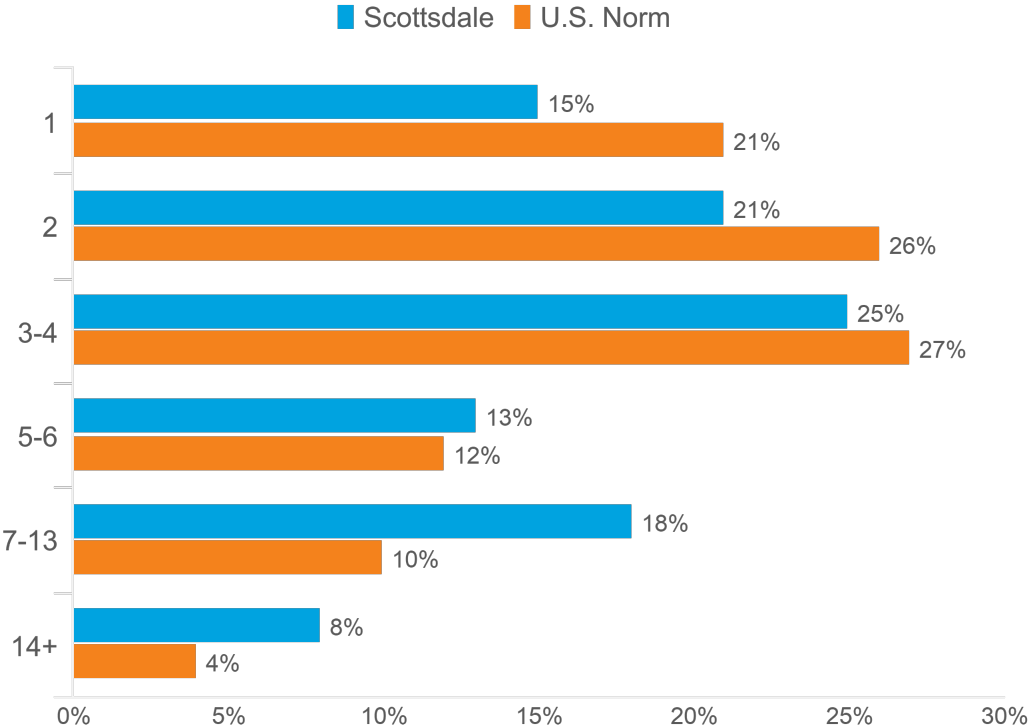
DMA Origin Of Trip

| | 2022 | 2021 |
|----------------------|------|------|
| Phoenix, AZ | 13% | 19% |
| Los Angeles, CA | 12% | 10% |
| Tucson (Nogales), AZ | 5% | 3% |
| Chicago, IL | 4% | 5% |
| New York, NY | 4% | 6% |
| Las Vegas, NV | 3% | 1% |
| Denver, CO | 3% | 1% |

Season of Trip Total Overnight Person-Trips



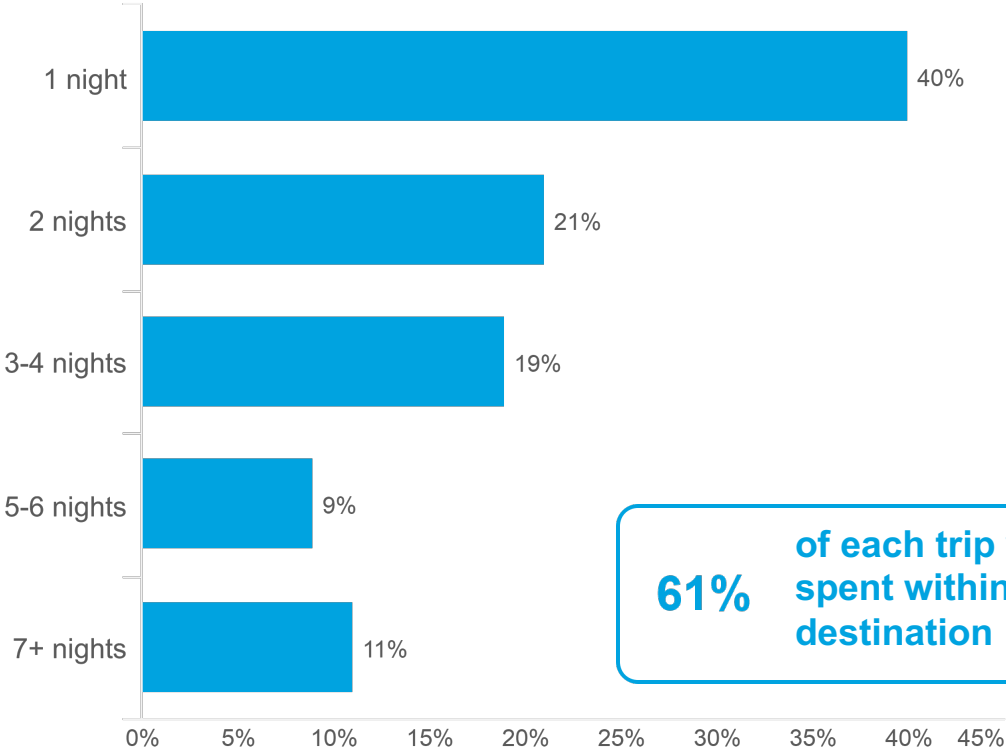
Total Nights Away on Trip



Scottsdale
5.4
Average Nights

U.S. Norm
3.9
Average Nights

Nights Spent in Scottsdale

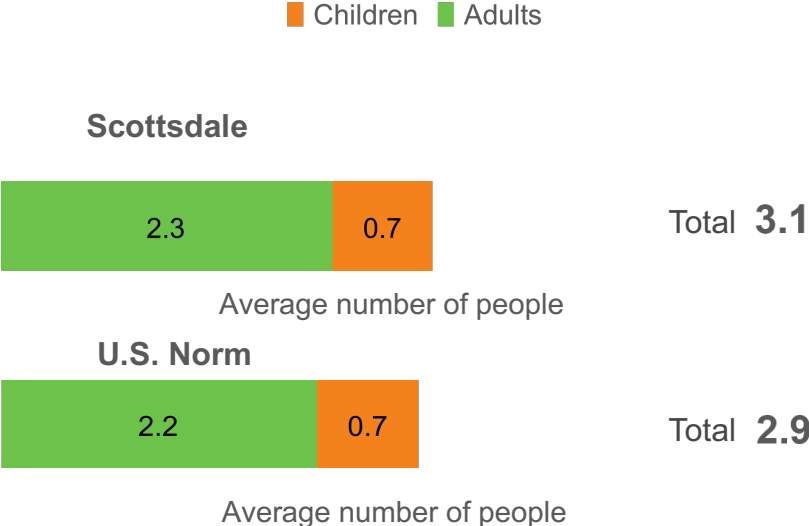


61% of each trip was spent within the destination

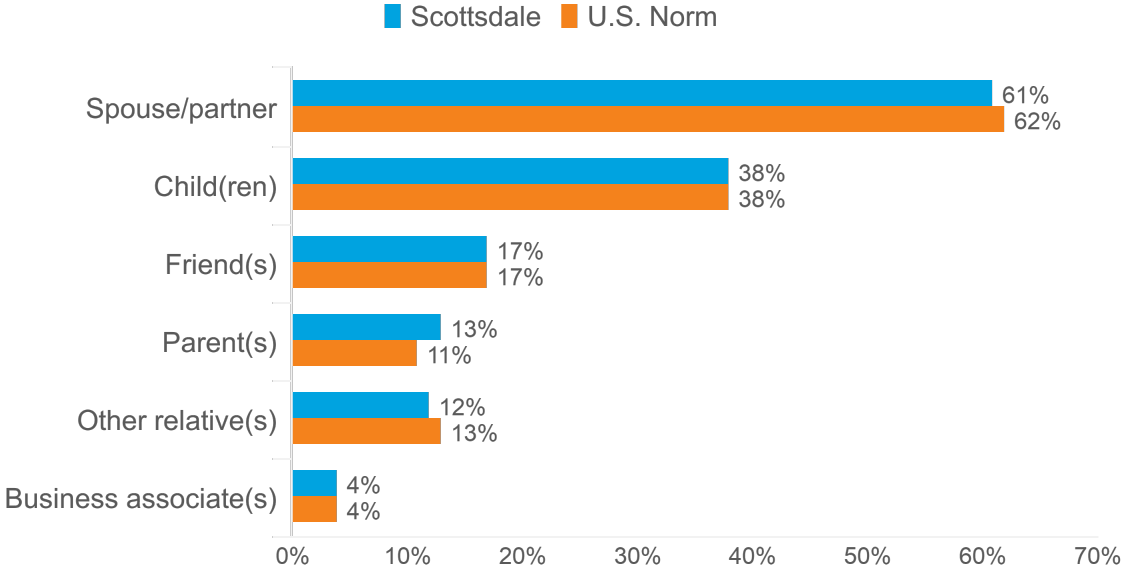
Average number of nights
3.3

Average last year
2.8

Size of Travel Party

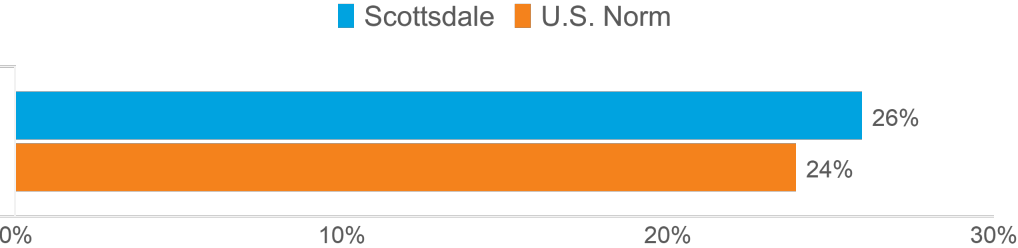


Composition of Immediate Travel Party

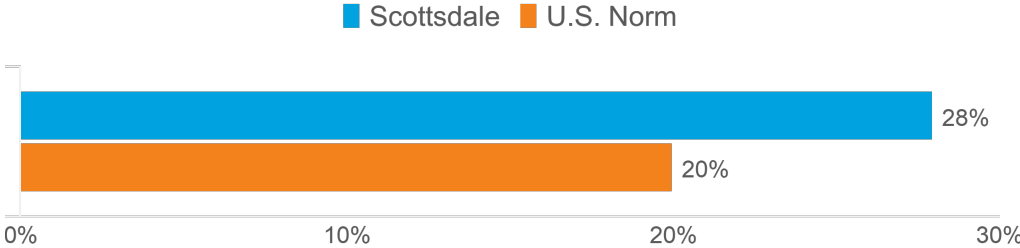


Base: 2022 Overnight Person-Trips that included more than one person

Percent Who Traveled Alone



Percent Who Had Travel Party Member with Disabilities

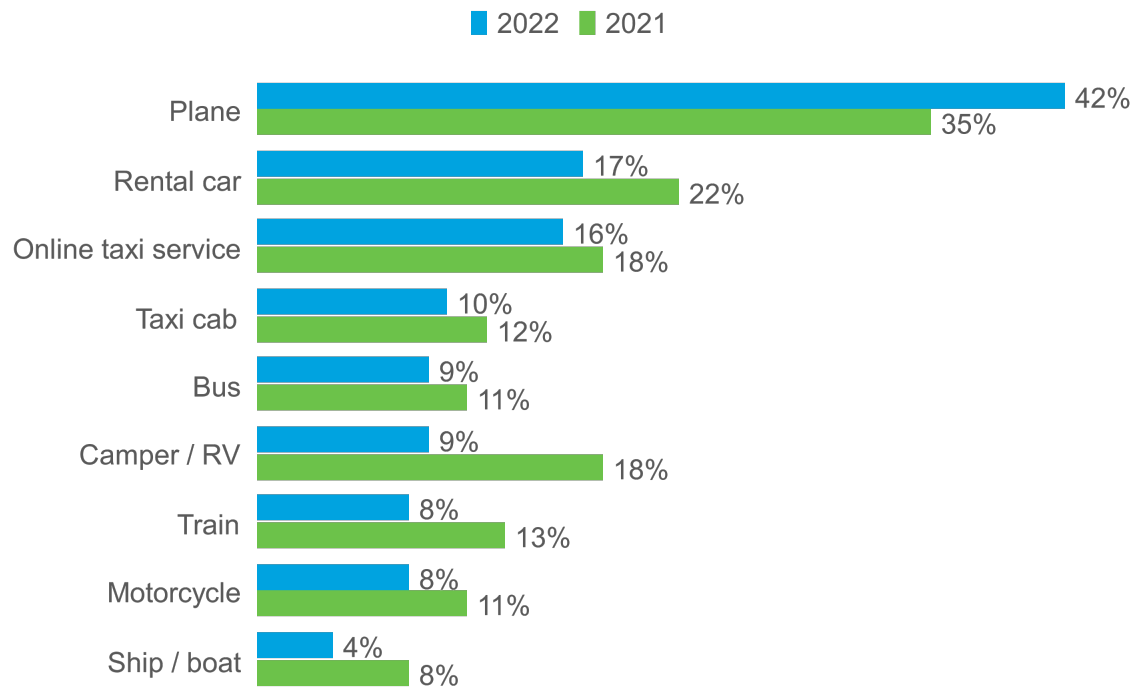


Transportation Used to get to Destination



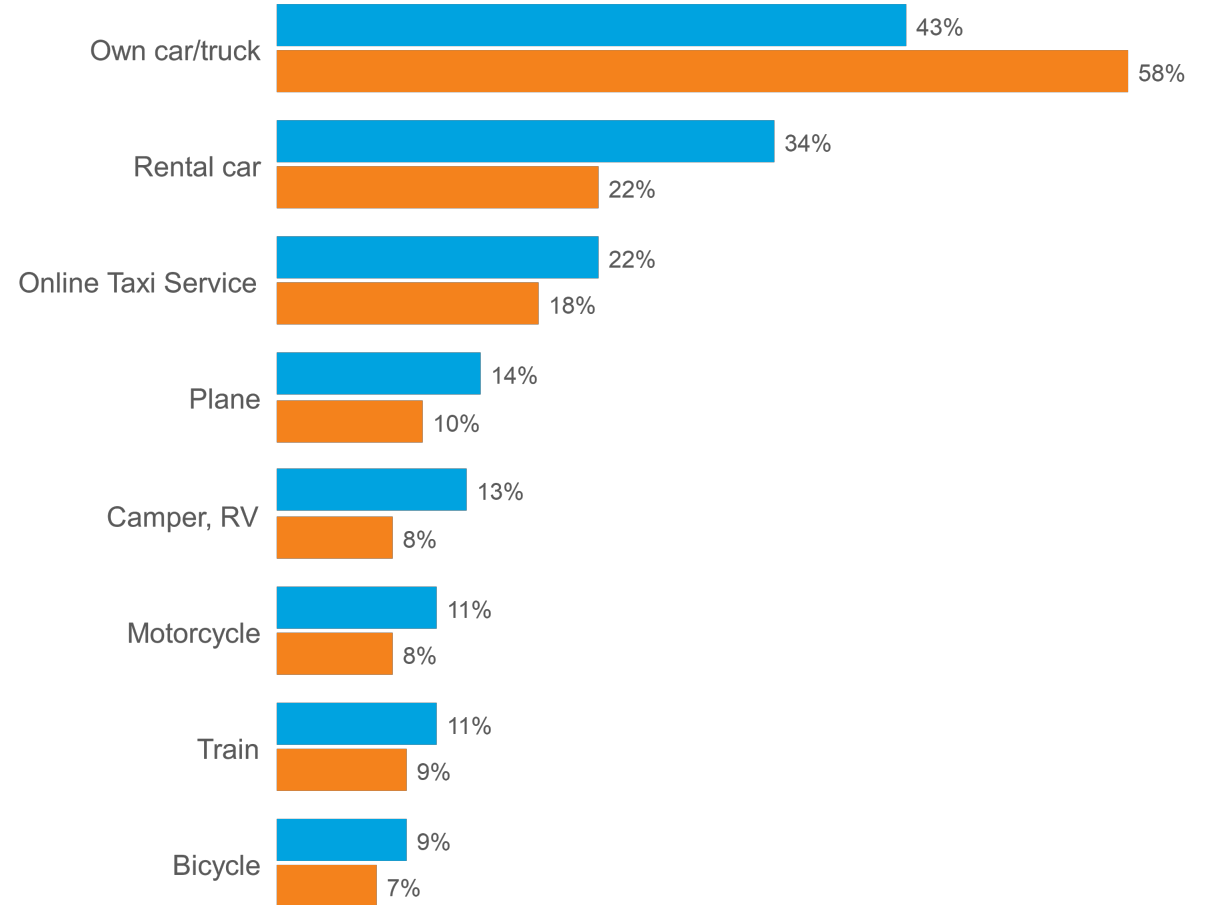
54% of overnight travelers use own car/truck to get to their destination

Previous year: 57%

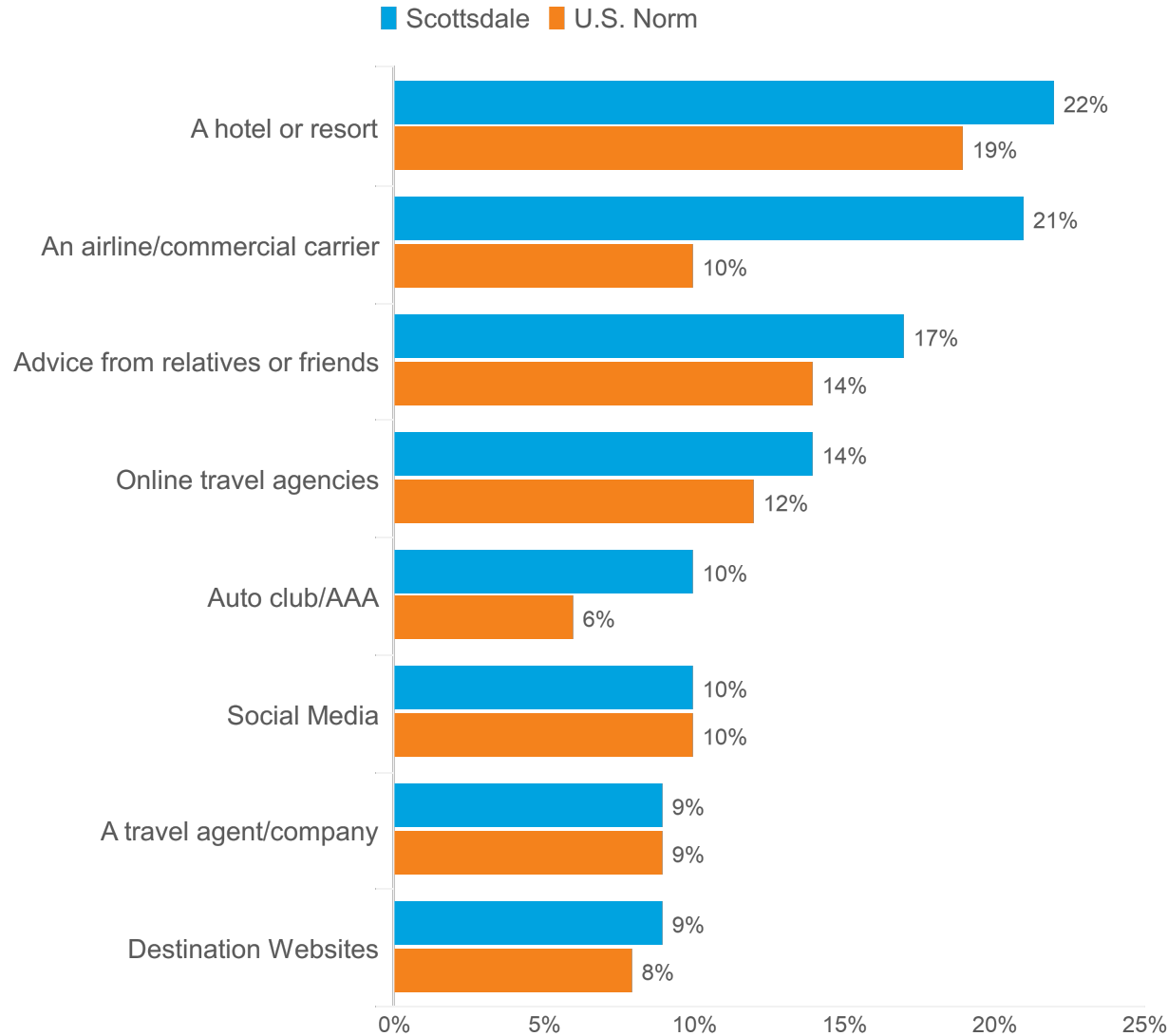


Transportation Used within Destination

■ Scottsdale ■ U.S. Norm



Trip Planning Information Sources



Length of Trip Planning

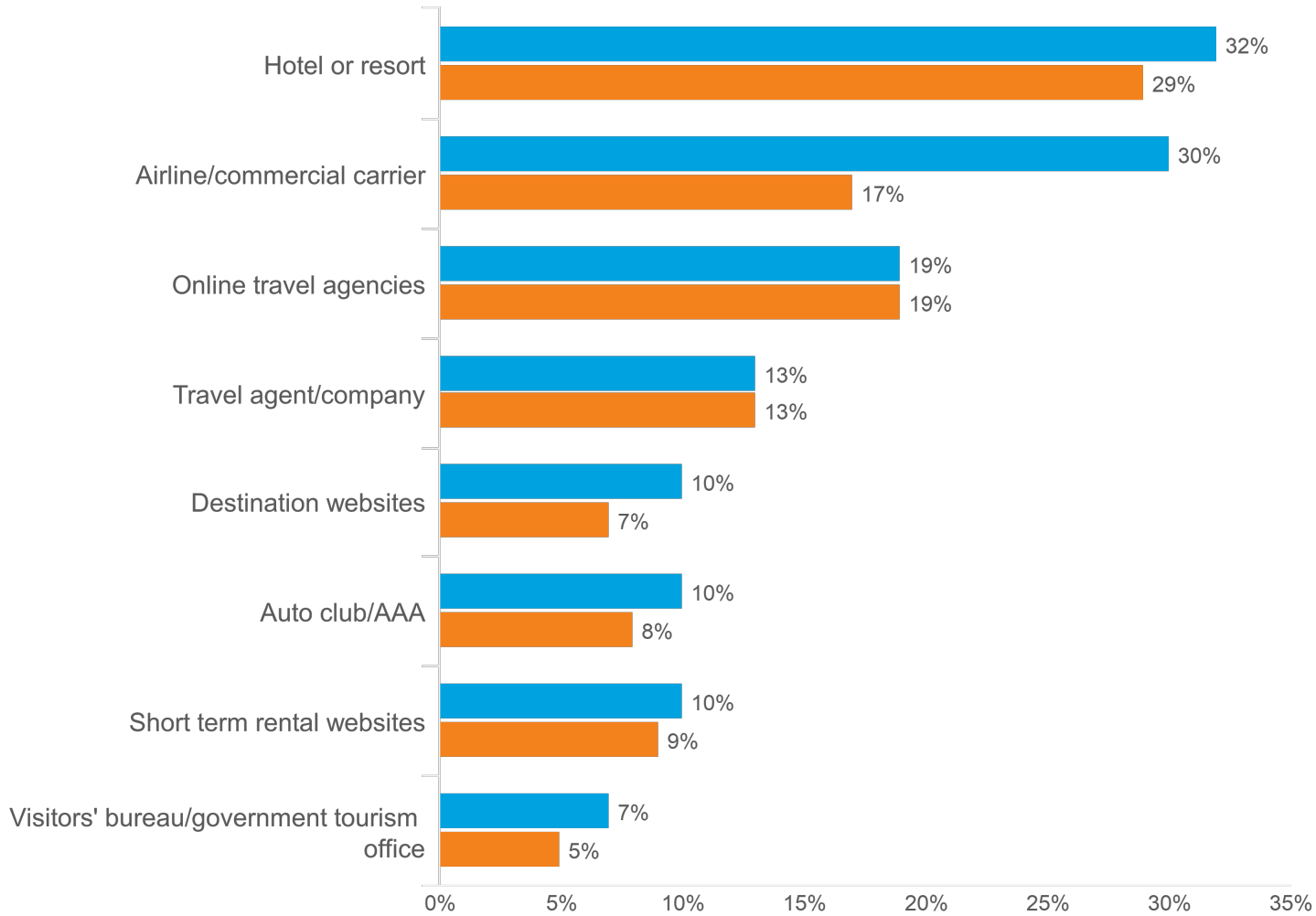
| | Scottsdale | U.S. Norm |
|----------------------------------|------------|-----------|
| 1 month or less | 23% | 31% |
| 2 months | 20% | 16% |
| 3-5 months | 24% | 18% |
| 6-12 months | 18% | 14% |
| More than 1 year in advance | 5% | 5% |
| Did not plan anything in advance | 10% | 16% |

Scottsdale's Overnight Trip Characteristics








Base: 2022 Overnight Person-Trips

Method of Booking

■ Scottsdale ■ U.S. Norm



Accommodations

| | 2022 | 2021 |
|---|------|------|
|  Hotel | 39% | 37% |
|  Home of friends / relatives | 20% | 13% |
|  Resort hotel | 18% | 16% |
|  Motel | 15% | 17% |
|  Rented home / condo / apartment | 8% | 11% |
|  Campground / RV park | 8% | 10% |
|  Country inn / lodge | 8% | 11% |

Activity Groupings

Outdoor Activities



59%

U.S. Norm: 48%

Entertainment Activities



59%

U.S. Norm: 54%

Cultural Activities



39%

U.S. Norm: 29%

Sporting Activities



36%

U.S. Norm: 21%









Business Activities









22%

U.S. Norm: 17%

Activities and Experiences (Top 10)







| | 2022 | 2021 |
|---|------|------|
|  Shopping | 31% | 27% |
|  Sightseeing | 24% | 19% |
|  Attending celebration | 17% | 14% |
|  Swimming | 17% | 14% |
|  Hiking/backpacking | 17% | 15% |
|  Landmark/historic site | 16% | 13% |
|  Bar/nightclub | 16% | 13% |
|  Museum | 15% | 11% |
|  Local parks/playgrounds | 13% | 10% |
|  National/state park | 12% | 12% |

Shopping Types on Trip

| | Scottsdale | U.S. Norm |
|--|------------|-----------|
|  Convenience/grocery shopping | 51% | 44% |
|  Outlet/mall shopping | 51% | 48% |
|  Big box stores (Walmart, Costco) | 41% | 33% |
|  Souvenir shopping | 39% | 41% |
|  Boutique shopping | 31% | 29% |
|  Antiquing | 17% | 12% |

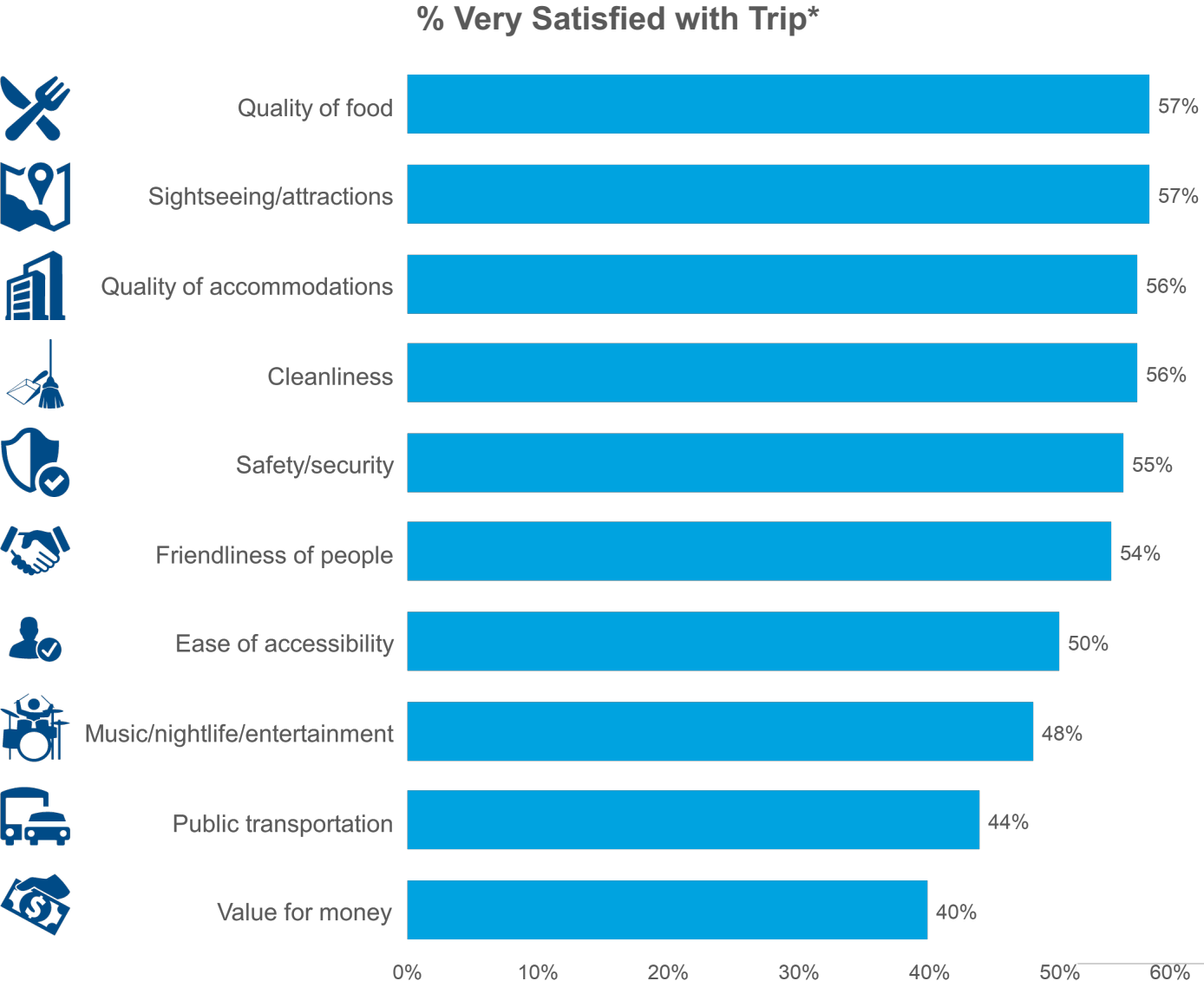
Base: 2022 Overnight Person-Trips that included Shopping

Dining Types on Trip

| | Scottsdale | U.S. Norm |
|--|------------|-----------|
|  Unique/local food | 52% | 47% |
|  Fine/upscale dining | 38% | 25% |
|  Food delivery service (UberEATS, DoorDash, etc.) | 25% | 21% |
|  Street food/food trucks | 25% | 23% |
|  Gastropubs | 17% | 10% |
|  Picnicking | 12% | 13% |



68%
of overnight travelers were
very satisfied with their overall
trip experience

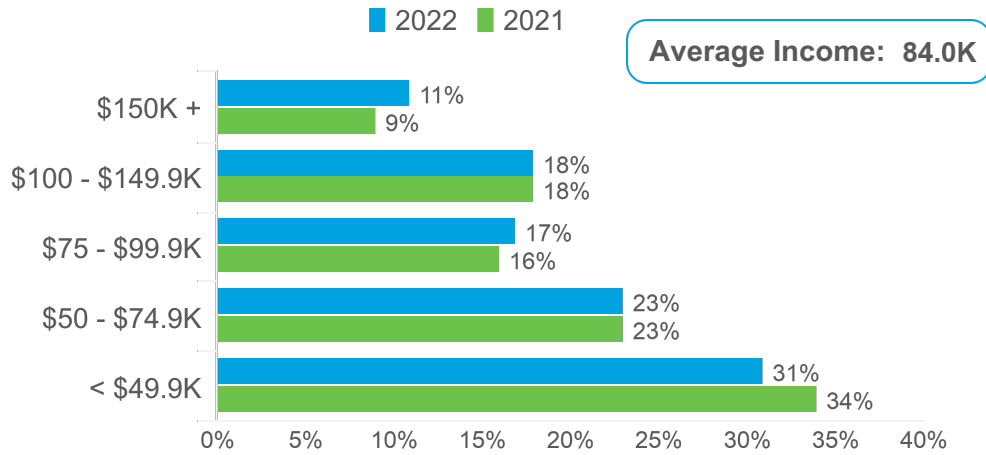


*Very satisfied = selected top box on a five point scale
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

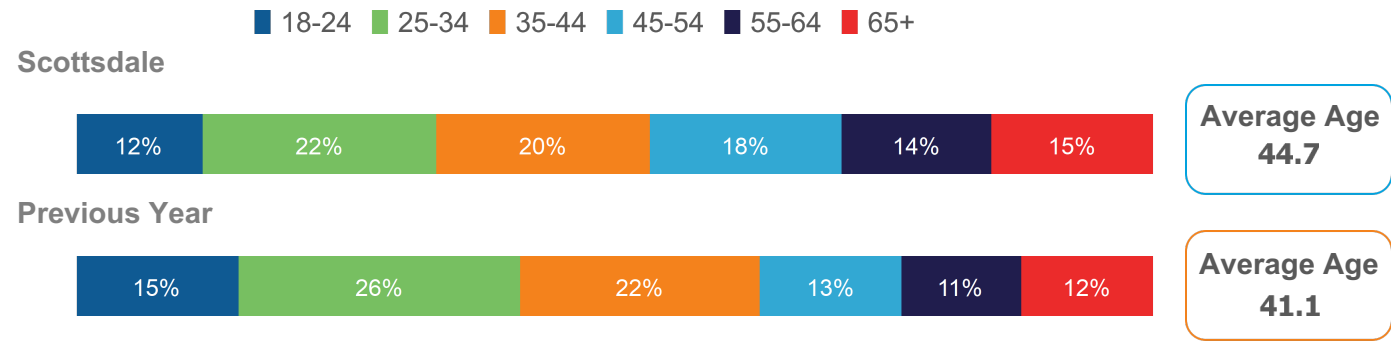
Demographic Profile of Overnight Scottsdale Visitors

Base: 2022 Overnight Person-Trips

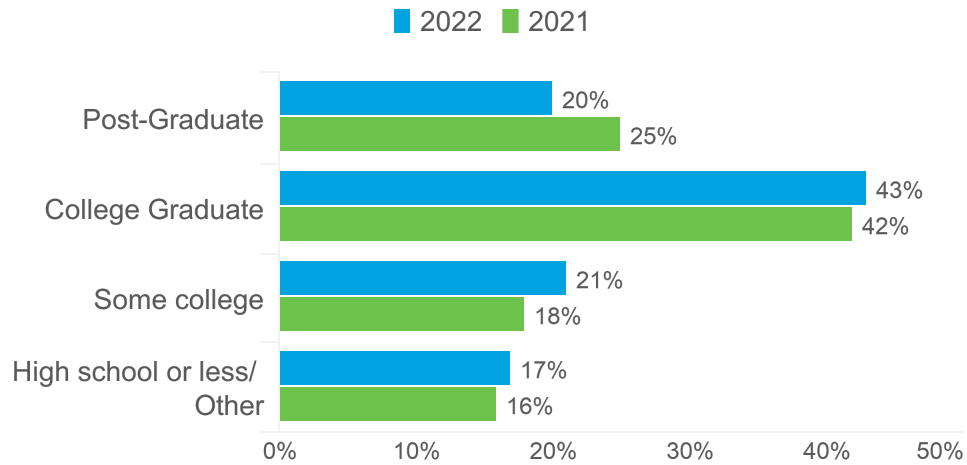
Household Income



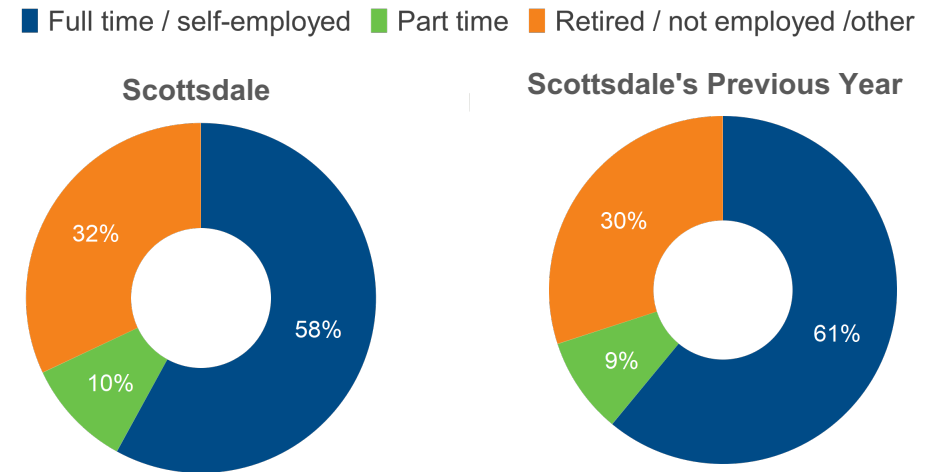
Age



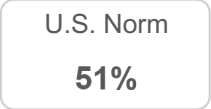
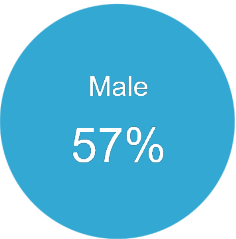
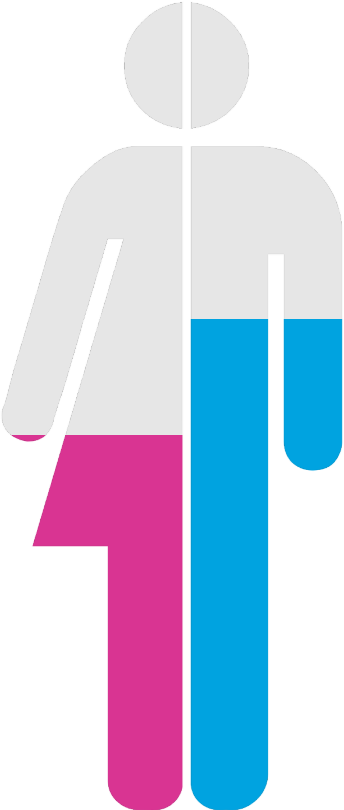
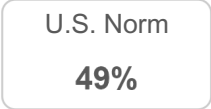
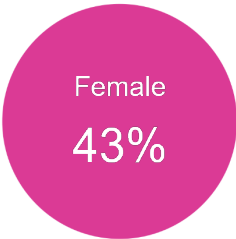
Educational Attainment



Employment

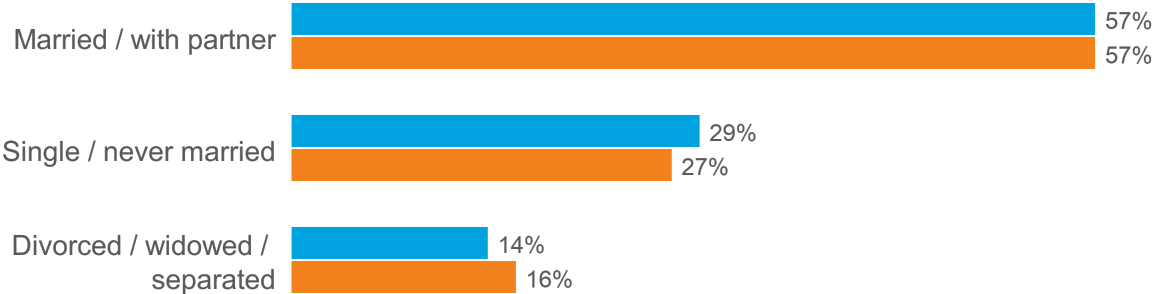


Gender



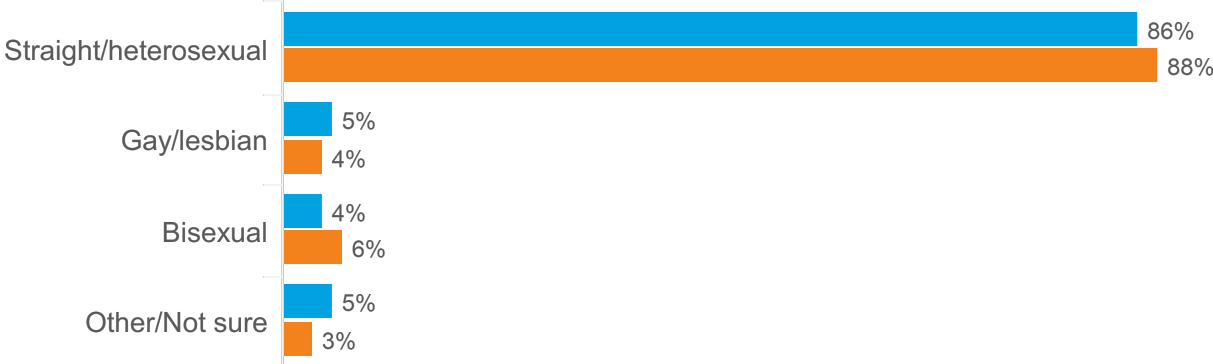
Marital Status

■ Scottsdale ■ U.S. Norm



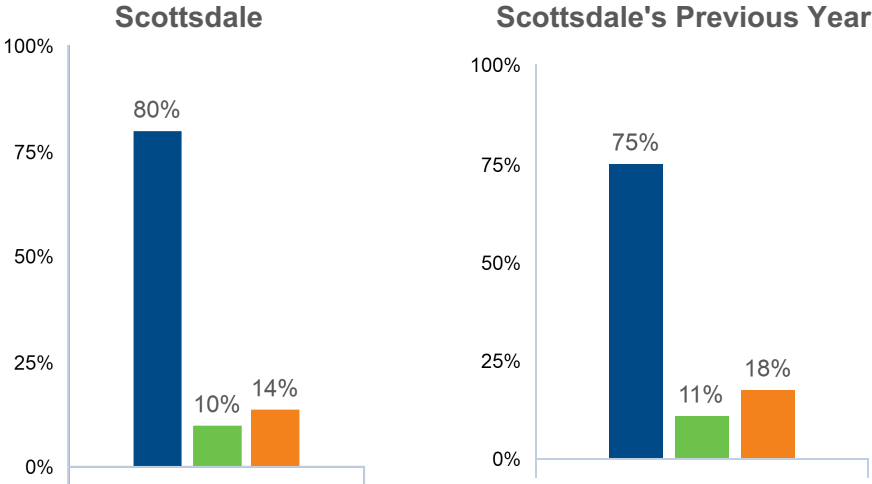
Sexual Orientation

■ Scottsdale ■ U.S. Norm



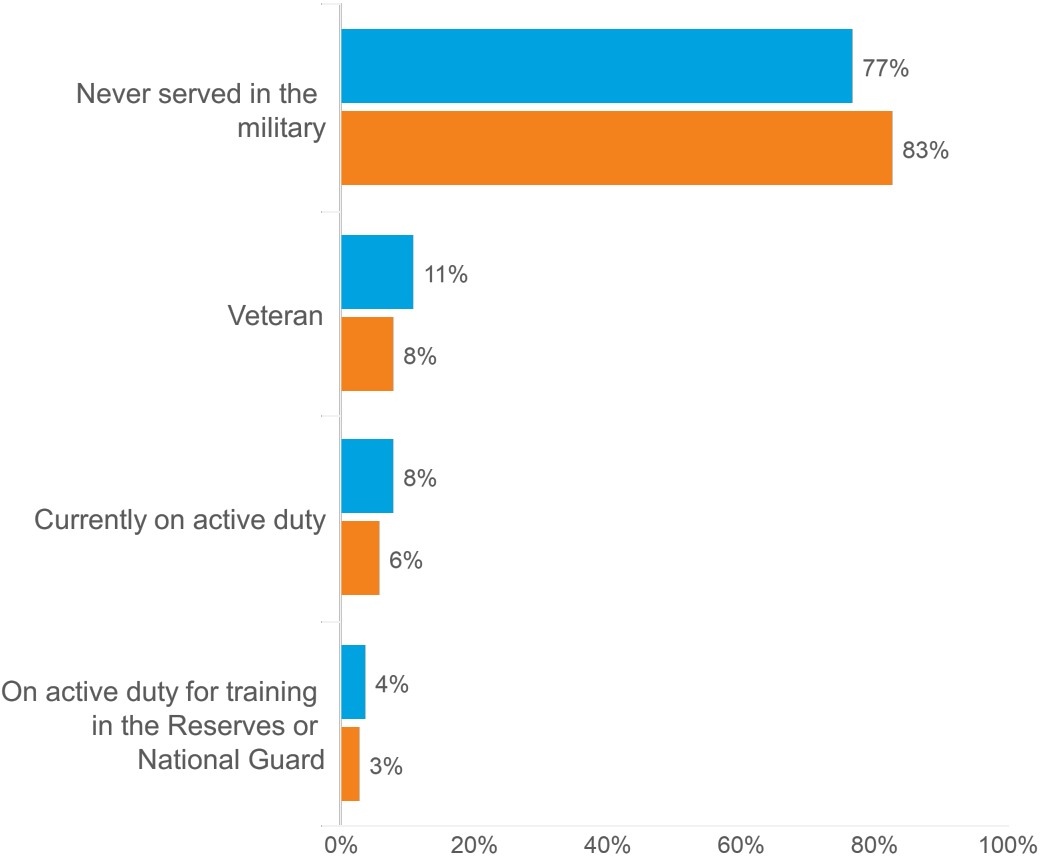
Race

■ White ■ African-American ■ Other



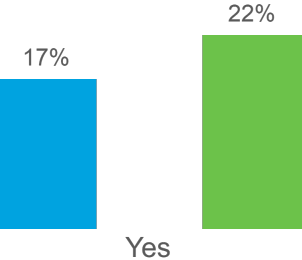
Military Status

■ Scottsdale ■ U.S. Norm

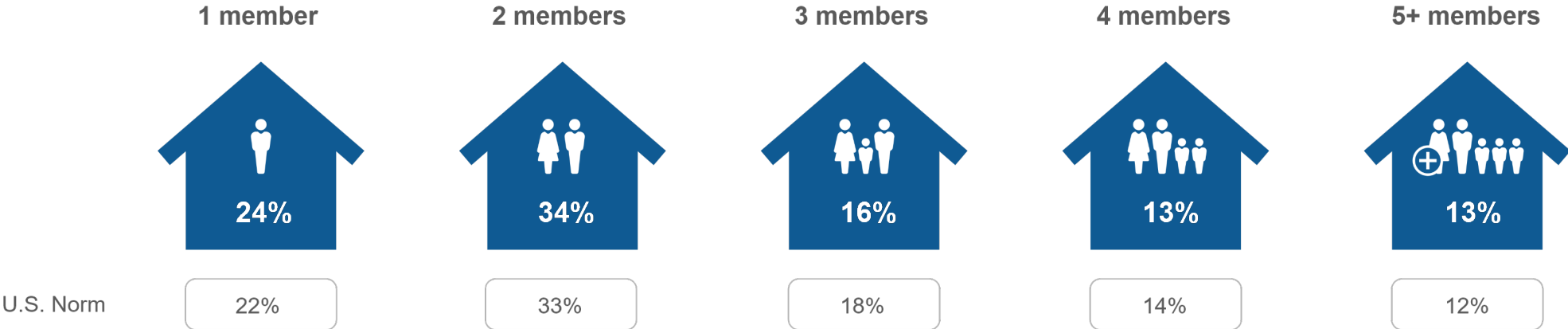


Hispanic Background

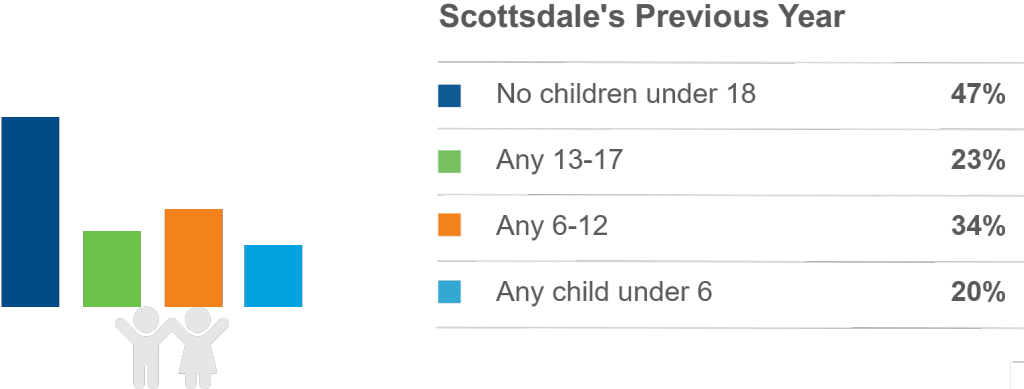
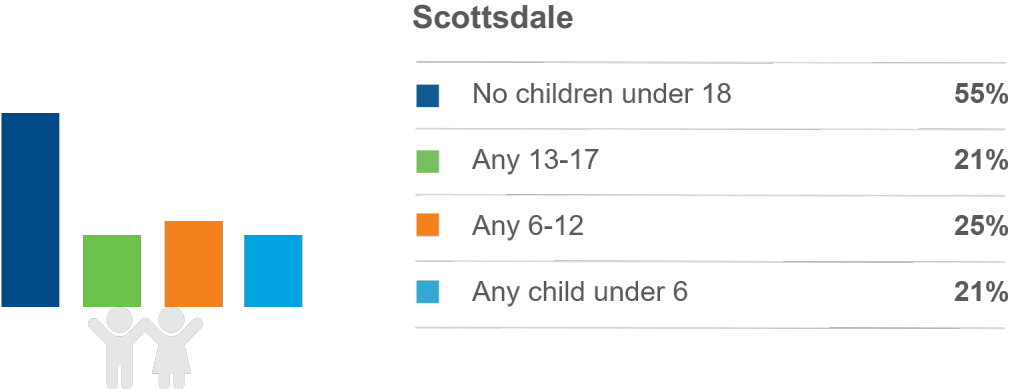
■ 2022 ■ 2021



Household Size



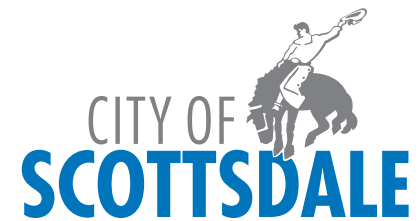
Children in Household





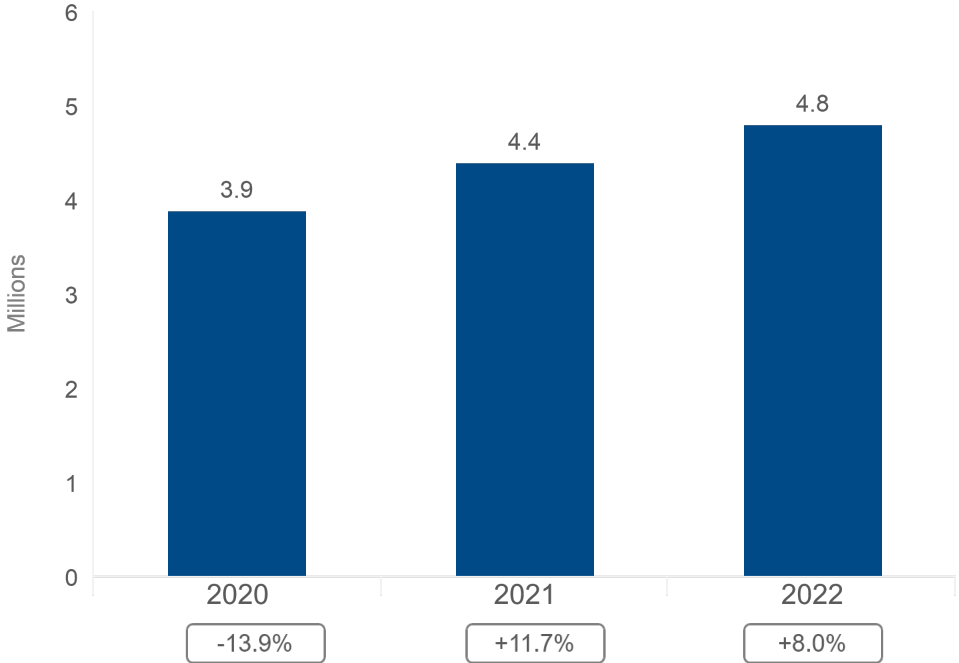
Travel USA Visitor Profile

Day Visitation



2022

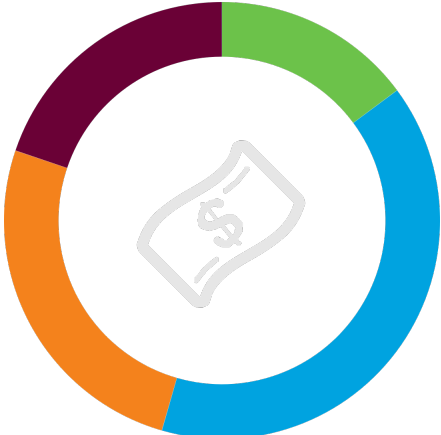
Day Trips to Scottsdale



Domestic Day Expenditures - by Sector

Total Spending
\$0.341 Billion

+16.2% vs. last year



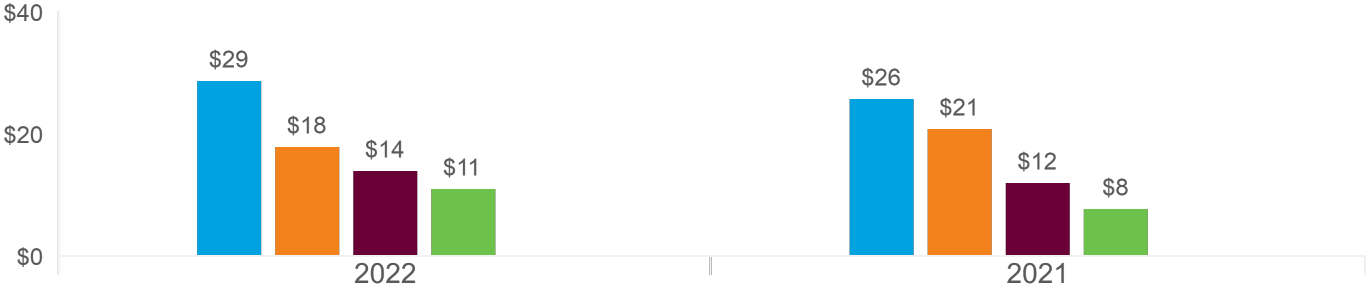
| | | |
|-------------------------------|-----|---------------|
| Transportation at Destination | 15% | \$51 Million |
| Restaurant Food & Beverage | 40% | \$136 Million |
| Retail Purchase | 26% | \$87 Million |
| Recreation/Entertainment | 20% | \$67 Million |

| |
|---------------|
| vs. last year |
| +21.0% |
| +16.5% |
| +9.0% |
| +22.7% |

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












Average Per Person Per Trip: \$72

Last year: \$66



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

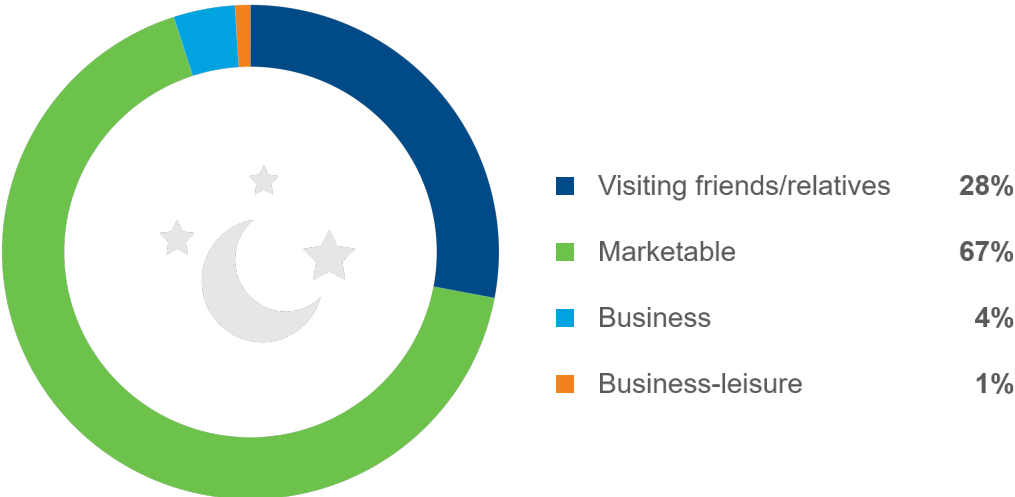
Main Purpose of Trip

| | |
|--|---|
|  28% Visiting friends/ relatives | |
|  18% Touring |  2% Conference/ Convention |
|  12% City trip | |
|  8% Special event | |
|  7% Shopping |  2% Other business trip |
|  6% Outdoors | |
|  4% Theme park |  1% Business-Leisure |
|  3% Resort | |

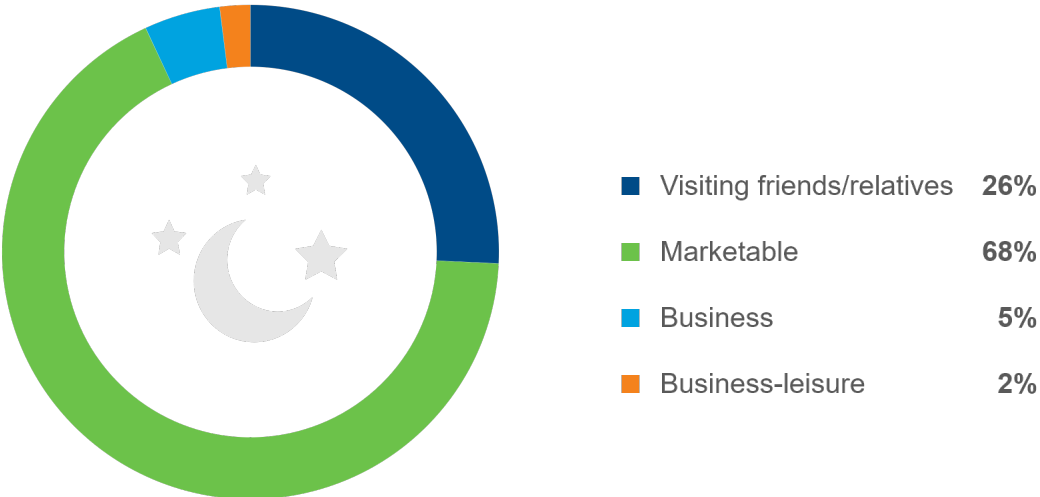
Main Purpose of Leisure Trip

| | 2022 | 2021 |
|-----------------------------|------------|------------|
| Visiting friends/ relatives | 28% | 26% |
| Touring | 18% | 16% |
| City trip | 12% | 15% |
| Special event | 8% | 8% |
| Shopping | 7% | 9% |
| Outdoors | 6% | 7% |
| Theme park | 4% | 4% |
| Resort | 3% | 1% |

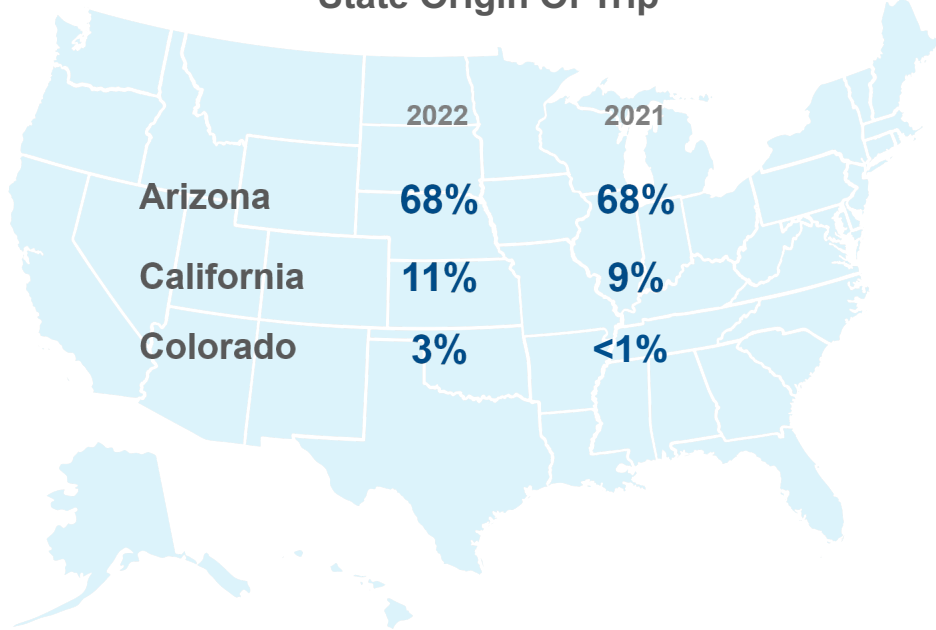
2022 Scottsdale Day Trips



Last Year's Scottsdale Day Trips



State Origin Of Trip



DMA Origin Of Trip

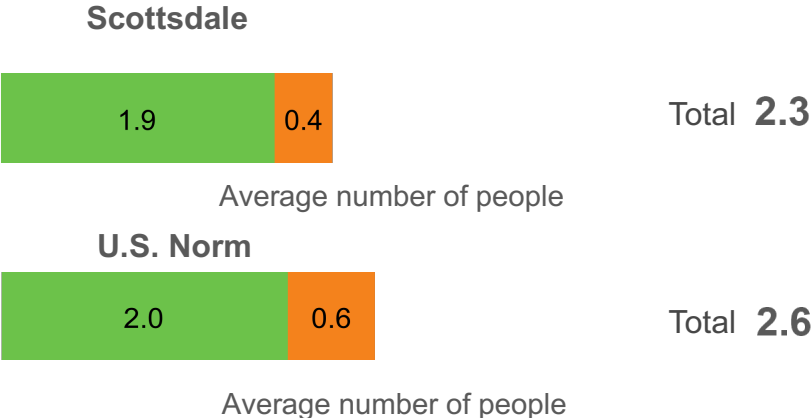
| | 2022 | 2021 |
|----------------------|------|------|
| Phoenix, AZ | 61% | 57% |
| Los Angeles, CA | 6% | 7% |
| Tucson (Nogales), AZ | 6% | 11% |
| Denver, CO | 3% | 0% |

Season of Trip Total Day Person-Trips



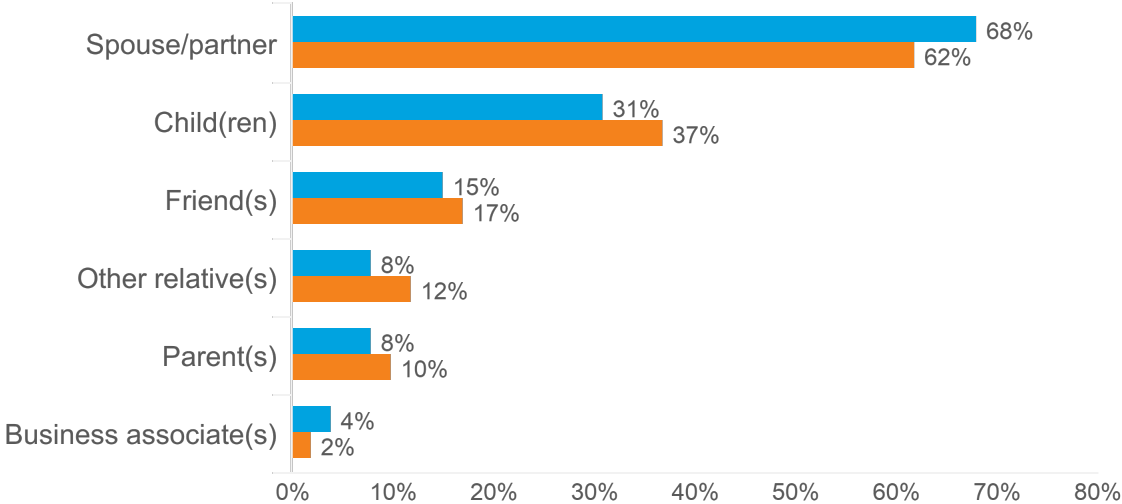
Size of Travel Party

Children Adults



Composition of Immediate Travel Party

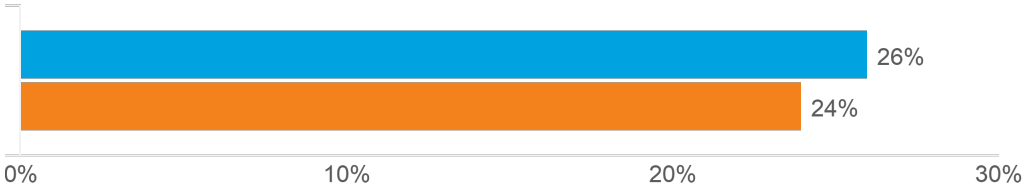
Scottsdale U.S. Norm



Base: 2022 Day Person-Trips that included more than one person

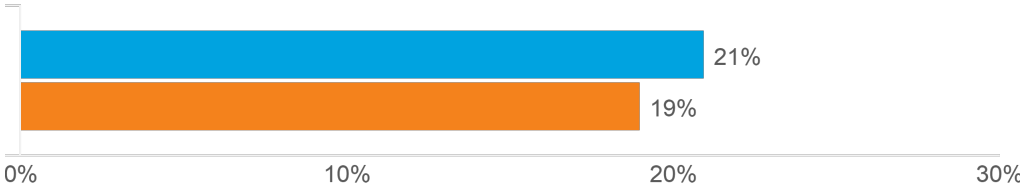
Percent Who Traveled Alone

Scottsdale U.S. Norm



Percent Who Had Travel Party Member with Disabilities

Scottsdale U.S. Norm



Activity Groupings

Outdoor Activities



U.S. Norm: 34%

Entertainment Activities



U.S. Norm: 40%

Cultural Activities



U.S. Norm: 20%

Sporting Activities



U.S. Norm: 14%

Business Activities









U.S. Norm: 11%

Activities and Experiences (Top 10)







| | 2022 | 2021 |
|--------------------------------|------|------|
| Shopping | 29% | 24% |
| Sightseeing | 15% | 11% |
| Bar/nightclub | 14% | 7% |
| Museum | 12% | 9% |
| Casino | 12% | 12% |
| Swimming | 10% | 8% |
| Attending celebration | 10% | 7% |
| Business meeting | 9% | 9% |
| Winery/brewery/distillery tour | 8% | 5% |
| Art gallery | 7% | 8% |

Shopping Types on Trip

| | Scottsdale | U.S. Norm |
|---|------------|------------|
|  Boutique shopping | 45% | 23% |
|  Outlet/mall shopping | 43% | 48% |
|  Convenience/grocery shopping | 31% | 28% |
|  Souvenir shopping | 26% | 26% |
|  Big box stores (Walmart, Costco) | 17% | 29% |
|  Antiquing | 17% | 12% |

Base: 2022 Day Person-Trips that included Shopping

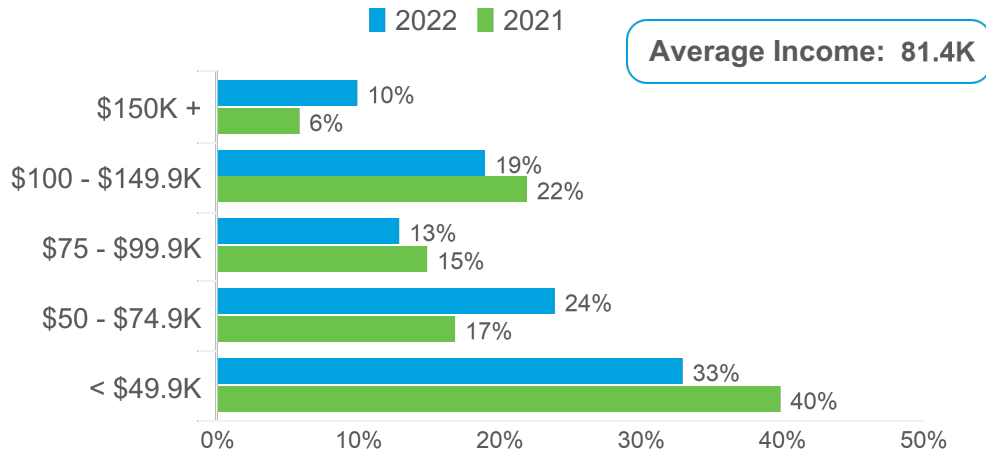
Dining Types on Trip

| | Scottsdale | U.S. Norm |
|--|------------|------------|
|  Unique/local food | 49% | 38% |
|  Fine/upscale dining | 28% | 15% |
|  Street food/food trucks | 21% | 19% |
|  Food delivery service (UberEATS, DoorDash, etc.) | 15% | 13% |
|  Picnicking | 13% | 12% |
|  Gastropubs | 10% | 7% |

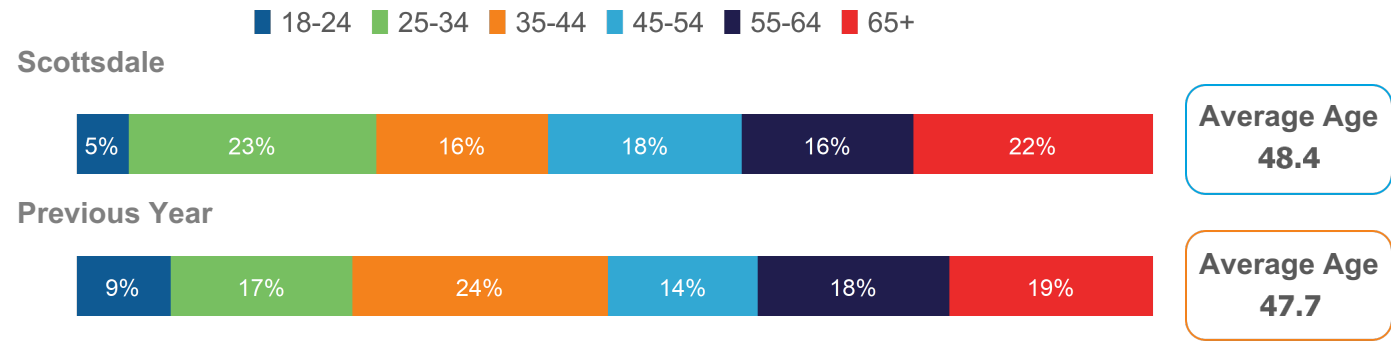
Demographic Profile of Day Scottsdale Visitors

Base: 2022 Day Person-Trips

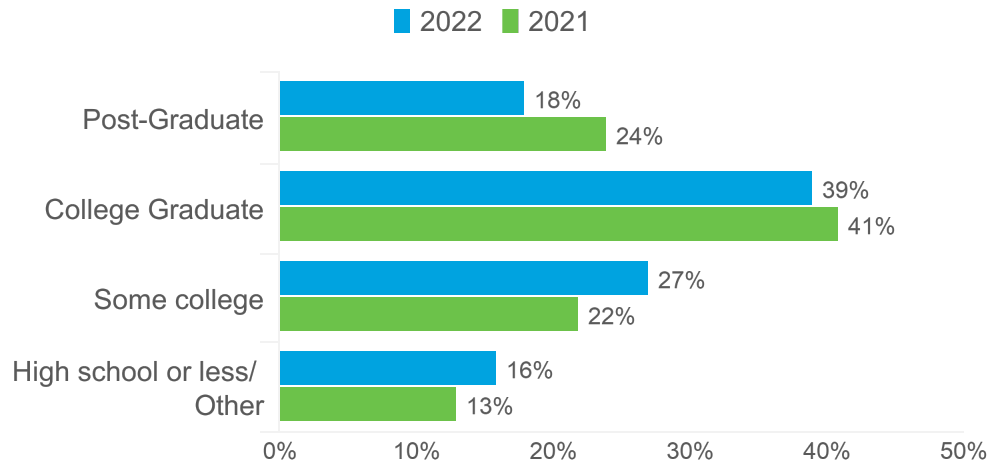
Household Income



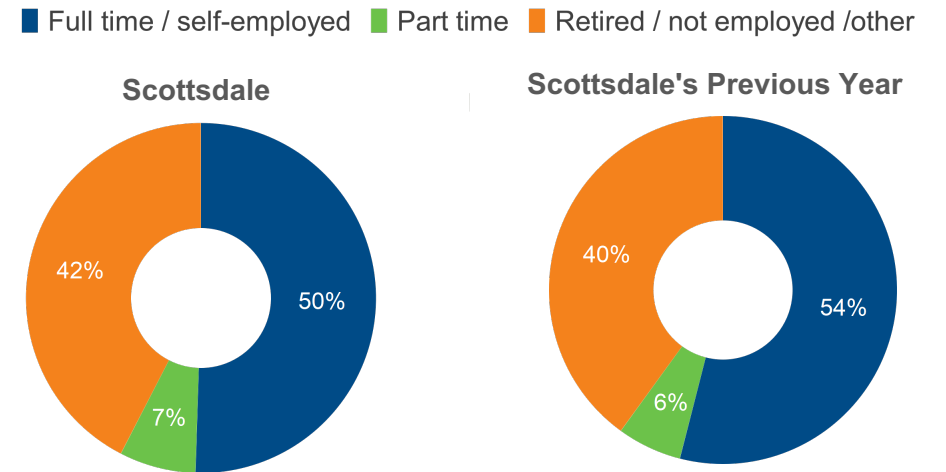
Age



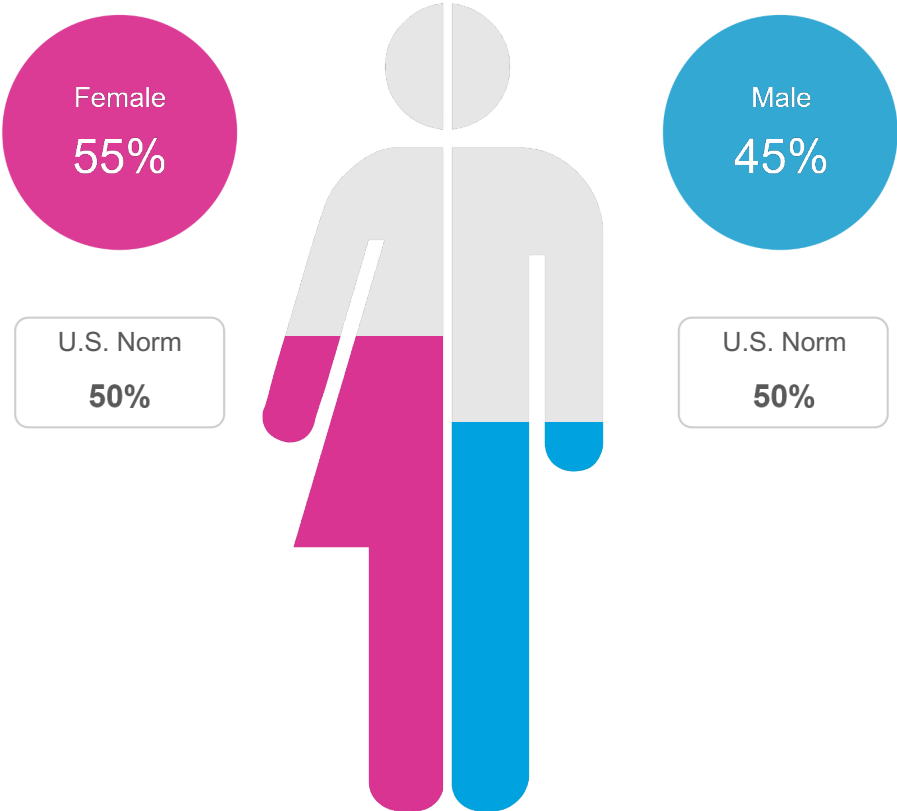
Educational Attainment



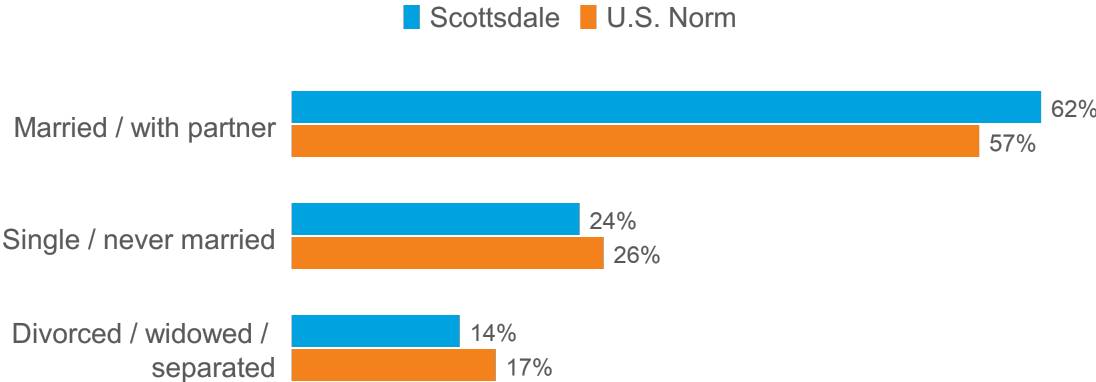
Employment



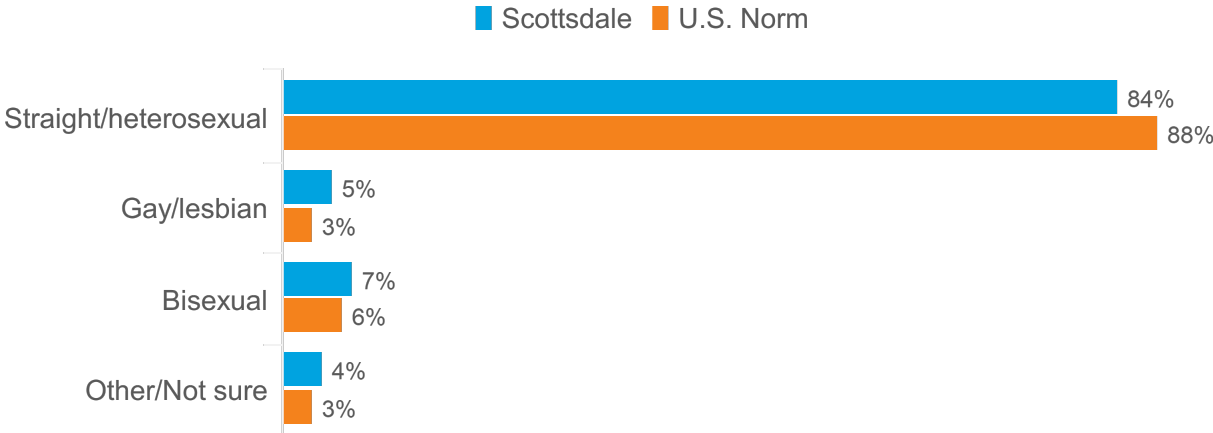
Gender



Marital Status

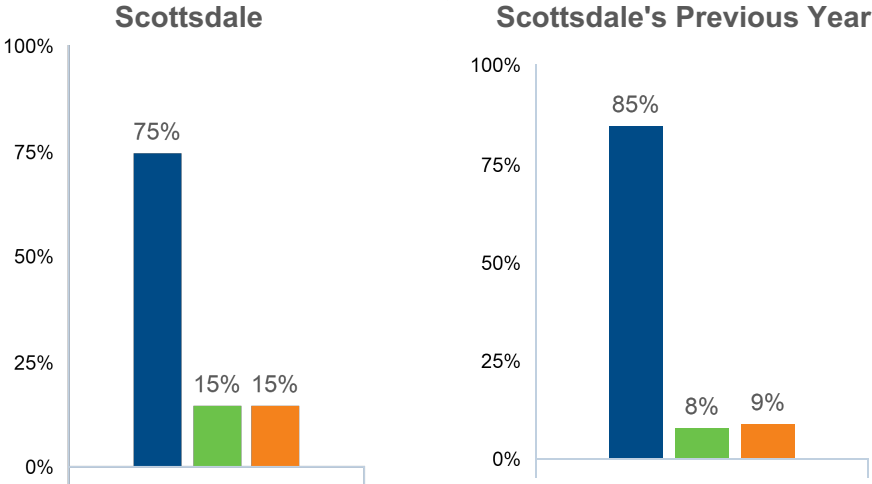


Sexual Orientation



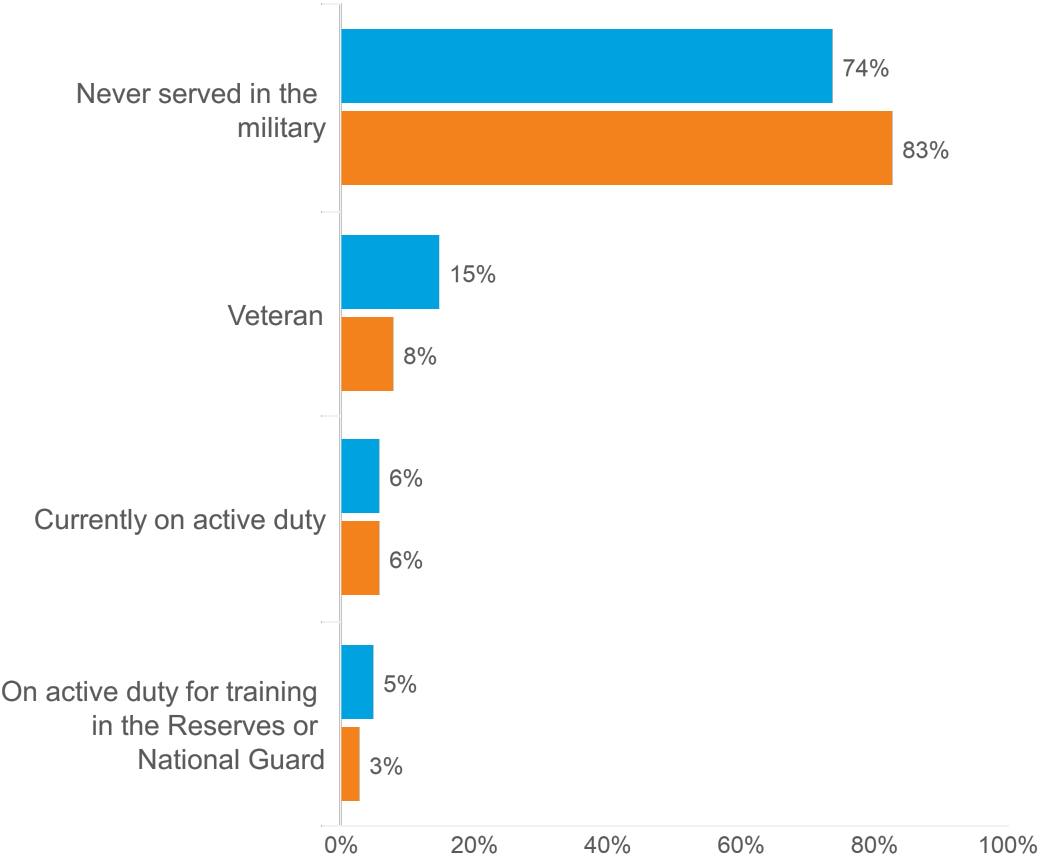
Race

■ White ■ African-American ■ Other



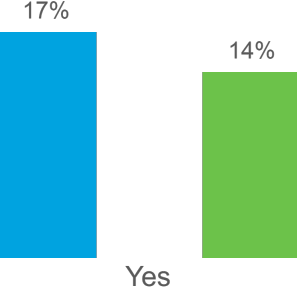
Military Status

■ Scottsdale ■ U.S. Norm

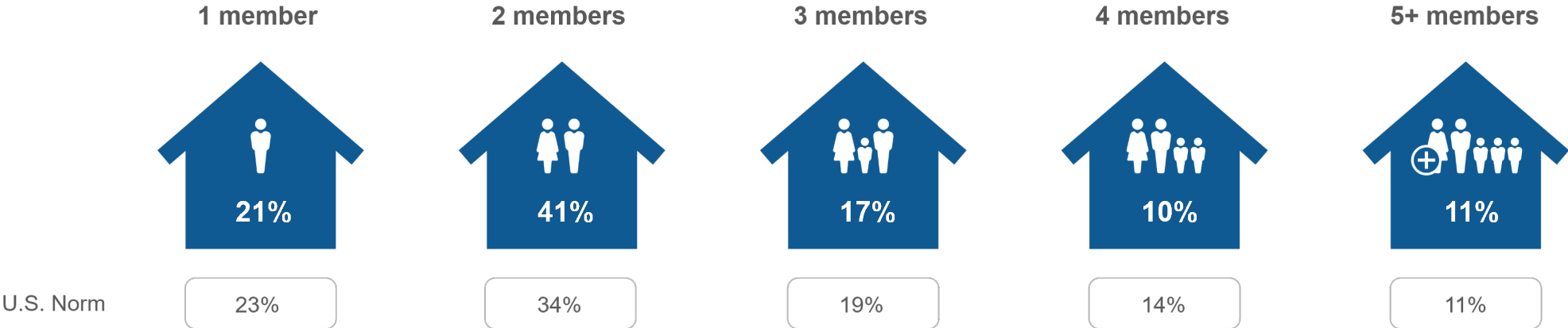


Hispanic Background

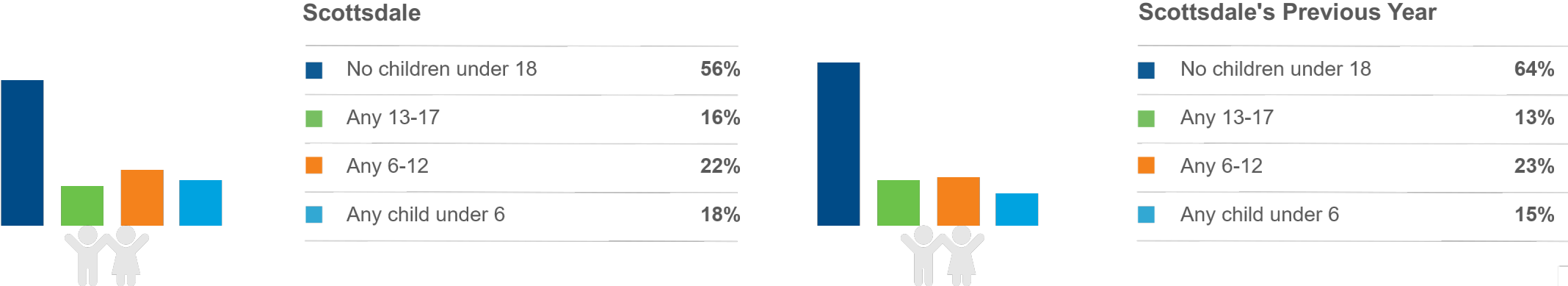
■ 2022 ■ 2021



Household Size



Children in Household



C  M P A S S

Longwoods
INTERNATIONAL