



ARIZONA OFFICE OF TOURISM TRAVELER PERSONAS RESEARCH

REPORT OF FINDINGS

May 2022

Destination  Analysts



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RESEARCH OVERVIEW & OBJECTIVES

This report presents the findings of a comprehensive traveler personas research study conducted by Destination Analysts, Inc. on behalf of the Arizona Office of Tourism. The primary focus of this research was to support the Arizona Office of Tourism with an evaluation of current perceptions of Arizona and gain a deep understanding of the types of travelers the Arizona Office of Tourism should prospect and market to. This focus was supported by several other research objectives, which were to identify and explore:

- High value traveler personas that are most efficient to convert to Arizona visitors and represent the highest positive impact
- Arizona's assets, experiences and attributes that motivate visitation
- How to reach and inspire high value traveler personas

RESEARCH METHODOLOGY

This extensive study consisted of a series of the following quantitative and qualitative research components:

- Highest Value Personas Identification Survey
- Destination Perception Survey of High Value Personas
- In-Depth Interviews of High Value Personas

Each of these research components are described in detail following.

RESEARCH METHODOLOGY

Highest Value Personas Identification Survey

The primary objective of this survey was to identify Arizona's highest value traveler personas. For the Highest Value Personas Identification Survey, 21 traveler personas from Destination Analysts' national persona framework were selected to test. These 21 personas were chosen for their best potential fit, as determined by tourism asset and product alignment, insights from the Arizona Office of Tourism and findings from past research conducted on behalf of the Arizona Office of Tourism. The survey questionnaire consisted of three sections:

- A screener that determined the appropriate sample of survey respondents, based on general travel behaviors
- A persona identification question set
- An Arizona high value persona identification question set

The persona identification question set was specifically designed to distinguish the 21 traveler personas, based on how they decide on leisure destinations to visit, otherwise known as the dominant motivation. In total, 2,007 completed surveys were collected from a nationally representative sample of adult leisure travelers.

RESEARCH METHODOLOGY

Arizona Destination Perception Survey

This quantitative survey was specifically designed to:

- Understand current perceptions of Arizona as a leisure destination from the perspective of Arizona's high value personas
- Explore messaging that would motivate visitation
- Prioritize high value personas

To complete the full survey, respondents must have met the following requirements:

- Adults age 18+
- Took at least one leisure trip in the past 12 months
- Identify as at least one of Arizona's high value personas

The survey was fielded November 19 – December 14, 2021 and March 20 – April 5, 2022. In total, 3,004 completed surveys were collected from a nationally representative sample of American leisure travelers who identify as at least one of Arizona's high value personas. In addition, a sample of 1,184 completed surveys were collected amongst American leisure travelers who do not identify as one of Arizona's high value personas.

RESEARCH METHODOLOGY

In-Depth Interviews of High Value Personas

To support quantitative findings from the Arizona Destination Perception Survey, Destination Analysts conducted one-on-one in-depth interviews with high value personas via online video conference. This qualitative research allowed for a deeper, richer exploration of travelers' interests, motivations and perceptions, particularly in relation to visiting Arizona for leisure.

The interviews were conducted December 6, 2021 – January 5, 2022. In total, 16 travelers who represent at least one of Arizona's high value personas were interviewed.



- Where Epic Reunions Happen
- Together is Better Here
- It's 80 Degrees Somewhere
- Poolside One Day, Powder the Next
- Where Culture is Indigenous
- Americana, Arizona Style
- Where Centered Meets Scenic



IN-DEPTH INTERVIEWS WITH LEISURE TRAVELERS: PARTICIPANT PROFILE

The panel of participants for the in-depth interviews consisted of travelers who:

- ☐ Took one or more leisure trips in the past 12 months that included an overnight stay
- ☐ Has visited or is interested in visiting Arizona for leisure
- ☐ Destination decision making role
- ☐ A minimum household income of \$50,000
- ☐ A mix of Arizona visitors and non-visitors
- ☐ Identify as at least one of Arizona's high value traveler personas
- ☐ Reside in key target markets for high value traveler personas (California, Texas, New York City and Chicago)

IN-DEPTH INTERVIEWS WITH LEISURE TRAVELERS: PARTICIPANT PROFILE

First Name	Persona	Residence	Gender	Generation	Income	Marital Status	Ethnicity	Visitation to Arizona In Past 3 Years
Abby	Self-Care Seekers	Deerfield, IL	Female	Millennial	\$250,000 to \$299,999	Married/Partnered	Caucasian	Yes
Alberto	Natural History Lovers	Lago Vista, TX	Male	Gen X	\$80,000 to \$99,999	Married/Partnered	Latino/Hispanic	Yes
Angela	Wild Bunch	New York, NY	Female	Gen X	\$200,000 to \$249,999	Married/Partnered	Caucasian	Yes
Ashley	Foodies without Pretense	Los Angeles, CA	Female	Millennial	\$50,000 to \$79,999	Single	Black, African-American	No
Daniel	Self-Care Seekers	South Hempstead, NY	Male	Gen X	\$150,000 to \$199,999	Married/Partnered	Caucasian	No
Deanna	Wild Bunch	Chicago, IL	Female	Gen X	\$125,000 to \$149,999	Married/Partnered	Caucasian	Yes
Edward	Foodies without Pretense	New York, NY	Male	Boomer	\$150,000 to \$199,999	Single	Caucasian	No
Jim	Luxury Travelers	San Francisco, CA	Male	Boomer	\$200,000 to \$249,999	Married/Partnered	Asian, Pacific Islander	No
Karl	Natural History Lovers	Oakland, CA	Male	Boomer	\$150,000 to \$199,999	Married/Partnered	Black, African-American	No
Kwanghyuk	Natural History Lovers	Houston, TX	Male	Gen X	\$150,000 to \$199,999	Married/Partnered	Asian, Pacific Islander	No
La Wanda	Self-Care Seekers	San Jose, CA	Female	Millennial	\$80,000 to \$99,999	Single	Black, African-American	No
Lainie	Wild Bunch	New York, NY	Female	Gen X	\$150,000 to \$199,999	Married/Partnered	Caucasian	No
Sean	Natural History Lovers	Chicago, IL	Male	Millennial	\$50,000 to \$79,999	Single	Black, African-American	Yes
Tag	Foodies without Pretense	Brooklyn, NY	Female	Millennial	\$150,000 to \$199,999	Single	Caucasian	Yes
TJ	Luxury Travelers	San Rafael, CA	Male	Millennial	\$150,000 to \$199,999	Single	Caucasian	Yes
Toby	Luxury Travelers	Chicago, IL	Female	Boomer	\$80,000 to \$99,999	Widowed/Divorced	Caucasian	No

ABOUT THIS REPORT

Findings presented within this report include insights specific to Arizona's recommended high value personas. The detailed findings section of this report presents a chart for the aggregate total of all leisure travelers surveyed in the Arizona Destination Perception Survey, as well as segmentation analysis by high value traveler persona.

Where applicable, insights from the In-Depth Interviews of High Value Personas are presented.

ABOUT THIS REPORT: KEY TERMS

The following terms are used in the summaries, analysis, charts and/or data tables within this report.

- **Leisure Travelers** – all respondents who completed the Arizona Destination Perception Survey. Also referred to as “all travelers,” “the average traveler” or “the typical traveler.”
- **Natural History Lovers** – leisure travelers who:
 - Consider it very important that a place has maintained its traditional culture or a sense of its historical past when selecting leisure destinations
 - Generally find visiting science and/or natural history museums very appealing
- **Luxury Travelers** – leisure travelers who:
 - Consider it important or very important to have at least one luxury travel experience when traveling for leisure
 - Are likely or very likely to stay in a five-star luxury hotel property in the next two years
 - Have a combined annual household income of \$150,000 or more
- **Self-Care Seekers** – leisure travelers who:
 - Strongly or generally agree with the statement *“A leisure destination with great spa services is my kind of destination”*
 - Took one or more leisure trips in the past twelve months that included a massage, spa services or saunas/hot springs

ABOUT THIS REPORT: KEY TERMS

- **Wild Bunch** – leisure travelers who:
 - Consider it important or very important that their family has the opportunity to spend time together in nature when they travel
 - Strongly or generally agree with the statement “*My family goes out of its way to find fun outdoor travel experiences*”
 - Say that their family often visits destinations that are outdoors, where they can be close to nature
 - Have children under the age of 18 at home
- **Foodies without Pretense** – leisure travelers who:
 - Consider a destination’s local food scene very important in selecting leisure destinations
 - Have done at least two of the following during a leisure trip in the past three years:
 - Researched the food experiences in the destination
 - Waited in line to try a well-known food item, restaurant or other food experience
 - Made local restaurant reservations prior to arrival
 - Went out of their way on a trip to eat at a place popular with the locals
- **Non-Personas** – leisure travelers who do not identify as one of Arizona’s high value personas.

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

High Value Personas for Arizona

In conducting this comprehensive research, Destination Analysts identified five recommended high value traveler personas for Arizona—Natural History Lovers, Luxury Travelers, Self-Care Seekers, Wild Bunch and Foodies Without Pretense.

These high value traveler personas, described on the following page, were specifically determined based on their likelihood of taking a leisure trip to Arizona in the next 3 years, their excitement about visiting Arizona for leisure, plus their agreement with the statement *“An Arizona vacation is a perfect fit for travelers like me.”* Other relevant metrics were considered in identifying the ultimate recommended high value personas for Arizona, including:

- The overlap of certain personas tested
- Agreement with the statement *“It is important that I travel in a manner that protects the environment”*
- Agreement with the statement *“I frequently make travel decisions purposefully to protect the environment of the places I visit”*
- Agreement with the statement *“It is important that I travel in a manner that respects the cultural values of the places I visit”*
- Number of leisure trips in the past 3 years
- Number of leisure trips to sunny, warm weather destinations in the past 2 years
- Number of days available for leisure travel in the next 12 months
- Average expected daily spending per person, per day during a week-long domestic leisure trip

EXECUTIVE SUMMARY

High Value Personas for Arizona



Dominant Motivation: Arts & Culture
Travelers who seek out destinations with geographic, human and/or other biological significance

- Consider it very important that a place has maintained its traditional culture or a sense of its historical past when selecting leisure destinations
- Generally find visiting science and/or natural history museums very appealing



Dominant Motivation: Luxury Experiences
Travelers who select destinations based on luxury travel options and can afford them

- Consider it important or very important to have at least one luxury travel experience when traveling for leisure
- Are likely or very likely to stay in a five-star luxury hotel property in the next two years
- Have a combined annual household income of \$150,000 or more



Dominant Motivation: Wellness
Spa treatments are the center pieces of these travelers' trips

- Strongly or generally agree with the statement "A leisure destination with great spa services is my kind of destination"
- Took one or more leisure trips in the past twelve months that included a massage, spa services or saunas/hot springs
- May also be referred to as Spa Fanatics

EXECUTIVE SUMMARY

High Value Personas for Arizona



Dominant Motivation: Family Togetherness
Families that love spending time together outdoors

- Consider it important or very important that their family has the opportunity to spend time together in nature when they travel
- Strongly or generally agree with the statement “My family goes out of its way to find fun outdoor travel experiences”
- Say that their family often visits destinations that are outdoors, where they can be close to nature
- Have children under the age of 18 at home



Dominant Motivation: Culinary and Food Scene
Authentic, “down home” regional cuisines, and experiences like farm-to-table and street food, drive these travelers’ choices

- Consider a destination’s local food scene very important in selecting leisure destinations
- Have done at least two of the following during a leisure trip in the past three years:
 - Researched the food experiences in the destination
 - Waited in line to try a well-known food item, restaurant or other food experience
 - Made local restaurant reservations prior to arrival
 - Went out of their way on a trip to eat at a place popular with the locals

EXECUTIVE SUMMARY

Marketing Arizona to Leisure Travelers

Arizona's natural assets, scenic beauty and weather were the top-of-mind attributes that drive this audience's desire to visit the state. When asked what about Arizona makes this audience want to visit the state, local nature and climate was mentioned most often, aided by scenic beauty and the Grand Canyon.



Question: Briefly describe what (if anything) about Arizona makes you want to visit there. Even if you are unfamiliar with Arizona, answer based on your current perceptions. Base: All persona respondents. 2,202 completed surveys.

EXECUTIVE SUMMARY

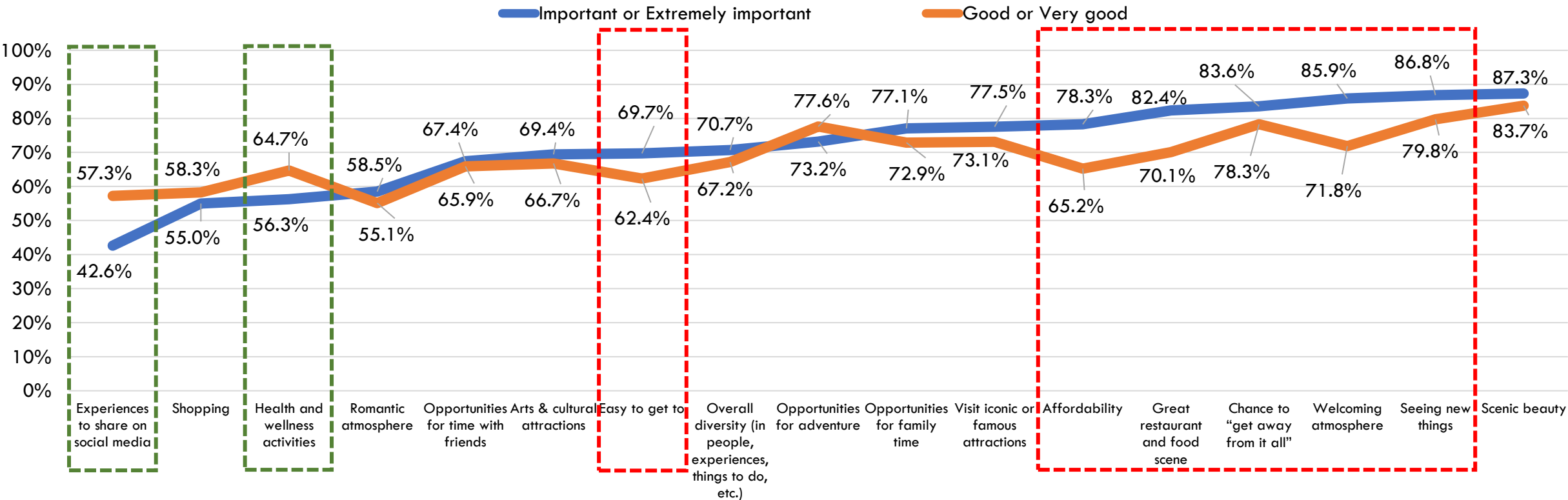
Marketing Arizona to Leisure Travelers

Arizona underperforms on five of the top ten attributes these travelers consider most important to how they select leisure destinations, particularly for welcoming atmosphere and affordability. Messaging to Arizona’s core and target audiences that emphasizes these red-boxed important attributes could effectively attract more visitors to the state.

Note on reading the chart: This chart ranks, from right to left, the percent of travelers who rated each attribute as “important”/”very important” for destinations they would like to visit (blue) against the percent of those who rated each of those attributes as “good”/”very good” for Arizona (orange). The red boxes highlight those most important attributes where Arizona performs below par. The green boxes highlight areas where Arizona’s ratings exceed importance.

Important Attributes to Destination Selection vs Association of Attributes with Arizona

Top 2 Box Score—% Rating each as “Important” or “Extremely important” vs. % selecting “Good” or “Very good” with Arizona



Questions 1: How important would each generally be to how you would select the places you would visit? Please use the scale below. 2: Please rate Arizona as a leisure destination for the following attributes using the scale below. Even if you are unfamiliar with Arizona please answer based on your current perceptions. Base: All persona respondents. 3,004 completed surveys.

EXECUTIVE SUMMARY

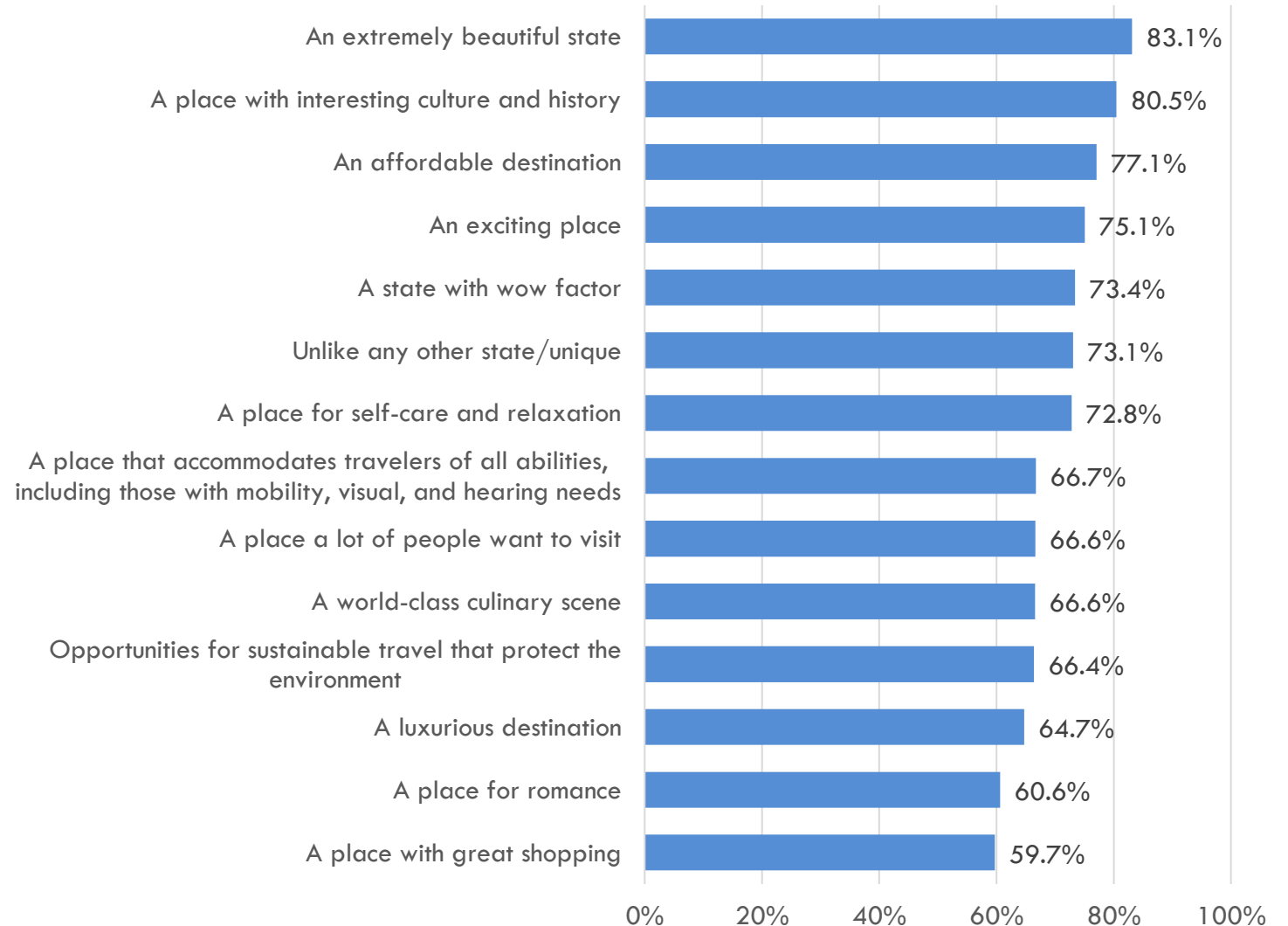
Marketing Arizona to Leisure Travelers

Consistent with scenic beauty being listed as a top desired attribute that would motivate visitation to Arizona, this audience notes that Arizona's primary appeal is for its beauty (83.1% say it is an extremely beautiful state). Culture/history (80.5%) and affordability (77.1%) round out the top three appealing features. These attributes should be prioritized in market messaging to increase these travelers' consideration of the state for a future trip.

Question: If Arizona were described as follows, how appealing would you find each statement? Arizona is/has _____.

Base: All persona respondents. 3,004 completed surveys.

Appeal of Arizona Attributes
(Percent who rated "Somewhat appealing" or "Extremely appealing")



EXECUTIVE SUMMARY

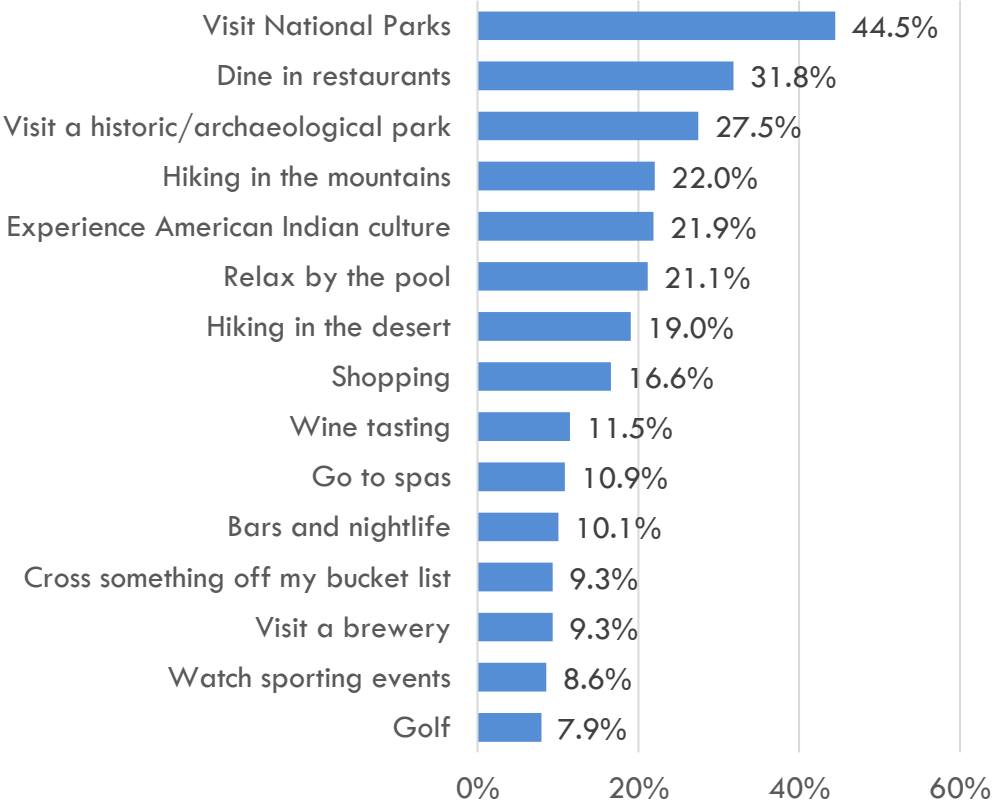
Marketing Arizona to Leisure Travelers

Visiting National Parks dominates other most desired trip activities (44.5%).

Dining (31.8%) and historic/archaeological parks (27.5%) form a second-level tier. In addition, mountain hiking (22.0%), American Indian culture (21.9%), and relaxing by the pool (21.1%) appeal to more than one-in-five.

Although not always to the same degree, every persona also places National Parks at the top. Top differences include an emphasis on dining by Foodies (34.1%) and Luxury Travelers (36.7%); relaxing by the pool by Self-Care Seekers (24.6%); shopping by Self-Care Seekers (21.6%); wine tasting by Self-Care Seekers (14.8%), the Wild Bunch (14.2%), and Luxury Travelers (14.0%); and hiking in the mountains (24.9%) or desert (20.8%) by the Wild Bunch.

Top Desired Arizona Activities



Question: If you visited Arizona, which would you most want to do? (Select at most 3)
Base: All persona respondents. 3,004 completed surveys.

EXECUTIVE SUMMARY

Marketing Arizona to Leisure Travelers

Arizona’s High Value Travelers consider “It’s 80 Degrees Somewhere” (27.8%) and “Together is Better Here” (27.6%) as nearly equal messaging that would most inspire them to visit. However, each high value persona selected “Together is Better Here” as the lead messaging statement that makes them most want to spend time in Arizona.

Message to Inspire Visitation to the Southwest

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
It’s 80 degrees somewhere	21.2%	22.8%	22.8%	20.7%	26.8%
Together is better here	28.3%	29.3%	35.3%	33.3%	28.4%
Rediscover road trips	12.3%	11.8%	8.4%	11.6%	14.6%
Rediscover vacations	13.5%	17.3%	14.1%	14.4%	16.6%
Where epic reunions happen	24.8%	18.7%	19.4%	20.0%	13.7%
Base	912	566	1,401	1,219	2,432

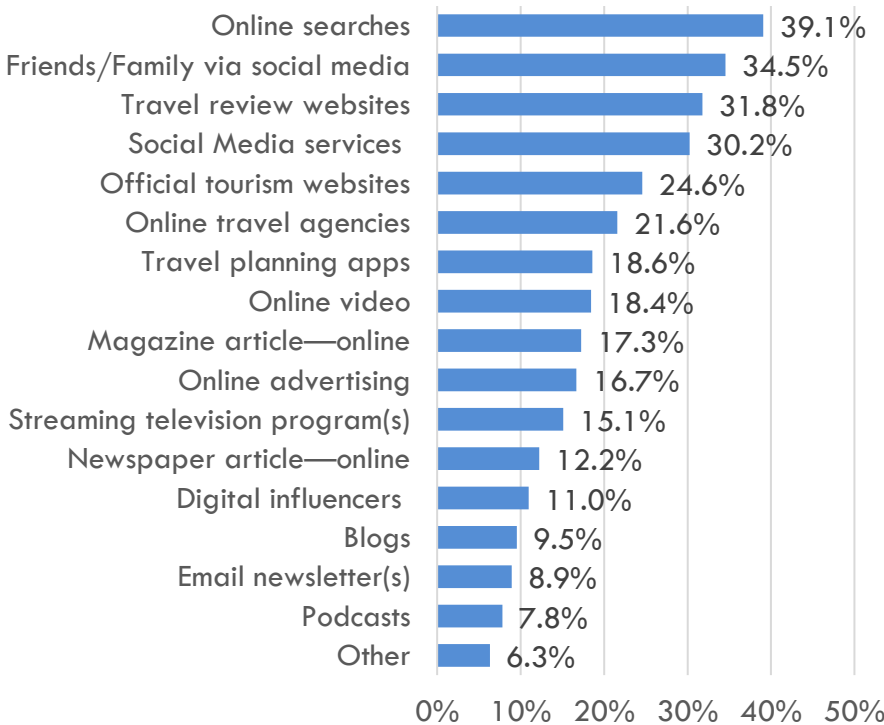
Question: Imagine you are considering visiting the Southwestern USA. Please pick the ONE MESSAGE that makes you most want to spend time in Arizona?
Base: All persona respondents. 3,004 completed surveys.

EXECUTIVE SUMMARY

Reaching Leisure Travelers

Digitally, this audience most commonly relies on online searches (39.1%) and friends/family via social media (34.5%) for ideas and inspiration.

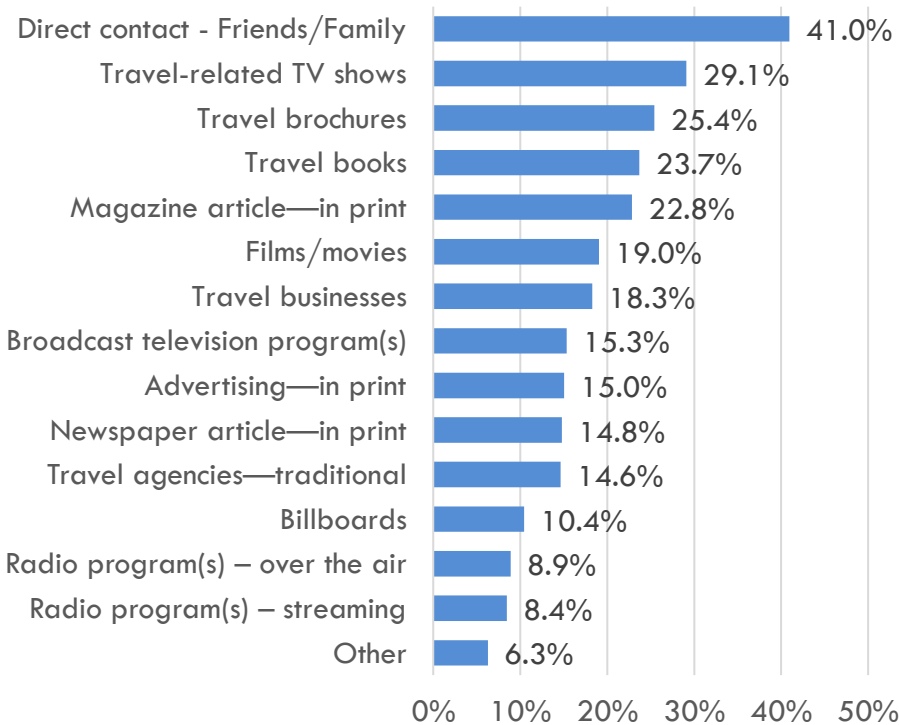
Digital Resources Used for Leisure Travel Inspiration



Question: From which digital resources do you get ideas and inspiration for where to travel for leisure? Base: All persona respondents. 2,997 completed surveys.

Non-digitally, direct contact with friends/family (41.0%) dominates other non-digital resources for ideas and inspiration. Secondly, this audience will turn to travel-related shows (29.1%) and travel brochures (25.4%).

Figure: Non-Digital Resources Used for Leisure Travel Inspiration



Question: From which non-digital resources do you get ideas and inspiration for where to travel for leisure? Base: All persona respondents. 2,974 completed surveys.



What aspects of Arizona should be prioritized in communications to travelers like you?

“Juxtapose experiences people don’t think of for Arizona and mention how you can do these things for a fraction of the cost. That is the winning argument. You can do the best things with a lot less money for a lot less hassle.”



Overview of Arizona Highest Value Persona Identification Survey

Identify Arizona's highest value traveler personas

21 personas tested for best potential fit, as determined by tourism product alignment and insights from the Arizona Office of Tourism

Total of 2,007 completed surveys collected

Nationally representative sample of adult leisure travelers

Data collected from September 13 – 16, 2021



Destination Analysts' Model Used to Identify High-Value Personas

Likelihood to take a leisure trip anywhere in the State of Arizona in the next 3 years

Level of excitement about taking a leisure trip to the State of Arizona

Level of agreement with the statement
"An Arizona vacation is a perfect fit for travelers like me"

Level of agreement with the statement *"It is important that I travel in a manner that protects the environment"*

Level of agreement with the statement *"I frequently make travel decisions purposefully to protect the environment of the places I visit"*

Level of agreement with the statement *"It is important that I travel in a manner that respects the cultural values of the places I visit"*

Using these variables, an average Arizona index score and Sustainability index grade is calculated for each persona

A x B + C = ARIZONA HIGH VALUE INDEX


$$\left(\begin{array}{l} \text{Likelihood to take} \\ \text{a leisure trip to} \\ \text{Arizona in the next} \\ \text{3 years} \end{array} \right) \times \left(\begin{array}{l} \text{Excitement to} \\ \text{take a leisure trip} \\ \text{to Arizona} \end{array} \right) + \left(\begin{array}{l} \text{Agreement with} \\ \text{"Arizona is} \\ \text{Perfect for Me"} \end{array} \right) = 110 \text{ Point Scale}$$

A x B + C = SUSTAINABILITY INDEX

$$\left(\begin{array}{c} \text{Agreement with "It is} \\ \text{important that I travel in a} \\ \text{manner that protects the} \\ \text{environment"} \end{array} \right) \times \left(\begin{array}{c} \text{Agreement with "I} \\ \text{frequently make travel} \\ \text{decisions purposefully to} \\ \text{protect the environment} \\ \text{of the places I visit"} \end{array} \right) + \left(\begin{array}{c} \text{Agreement with "It is} \\ \text{important that I travel in} \\ \text{a manner that respects} \\ \text{the cultural values of} \\ \text{the places I visit"} \end{array} \right) = 110 \text{ Point Scale}$$

GRADING SCORE

$$A = \geq 80 \mid B = 70-79 \mid C = \leq 69$$



TRAVELER PERSONAS TESTED

- **Bucket Listers**
- **Desert Doers**
- **Fit & Fabulous**
- **Foodies without Pretense**
- **Hardcore Outdoors People**
- **Luxury Travelers**
- **Natural History Lovers**
- **Nature Watchers**
- **Newbies**
- **Nostalgists**
- **Park Explorers**
- **Road Trippers**
- **Rural-ists**
- **RVers**
- **Small Town Charm Seeker**
- **Self-Care Seekers**
- **Sports Viewers**
- **Sun Chasers**
- **The Wild Bunch**
- **Unplugged**
- **Wine Tourist**

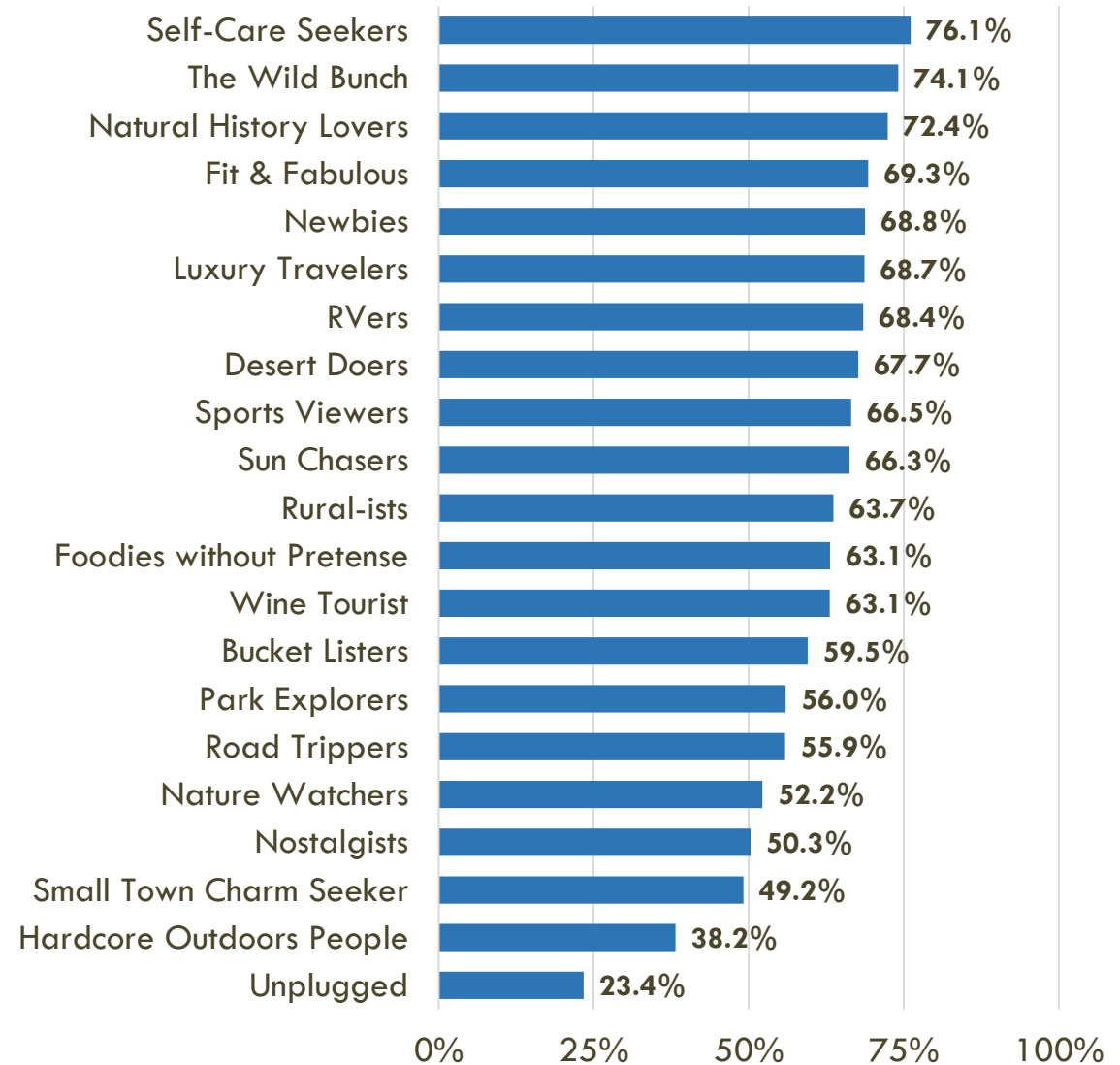


ARIZONA

HIGH VALUE INDEX METRICS FOR EACH PERSONA

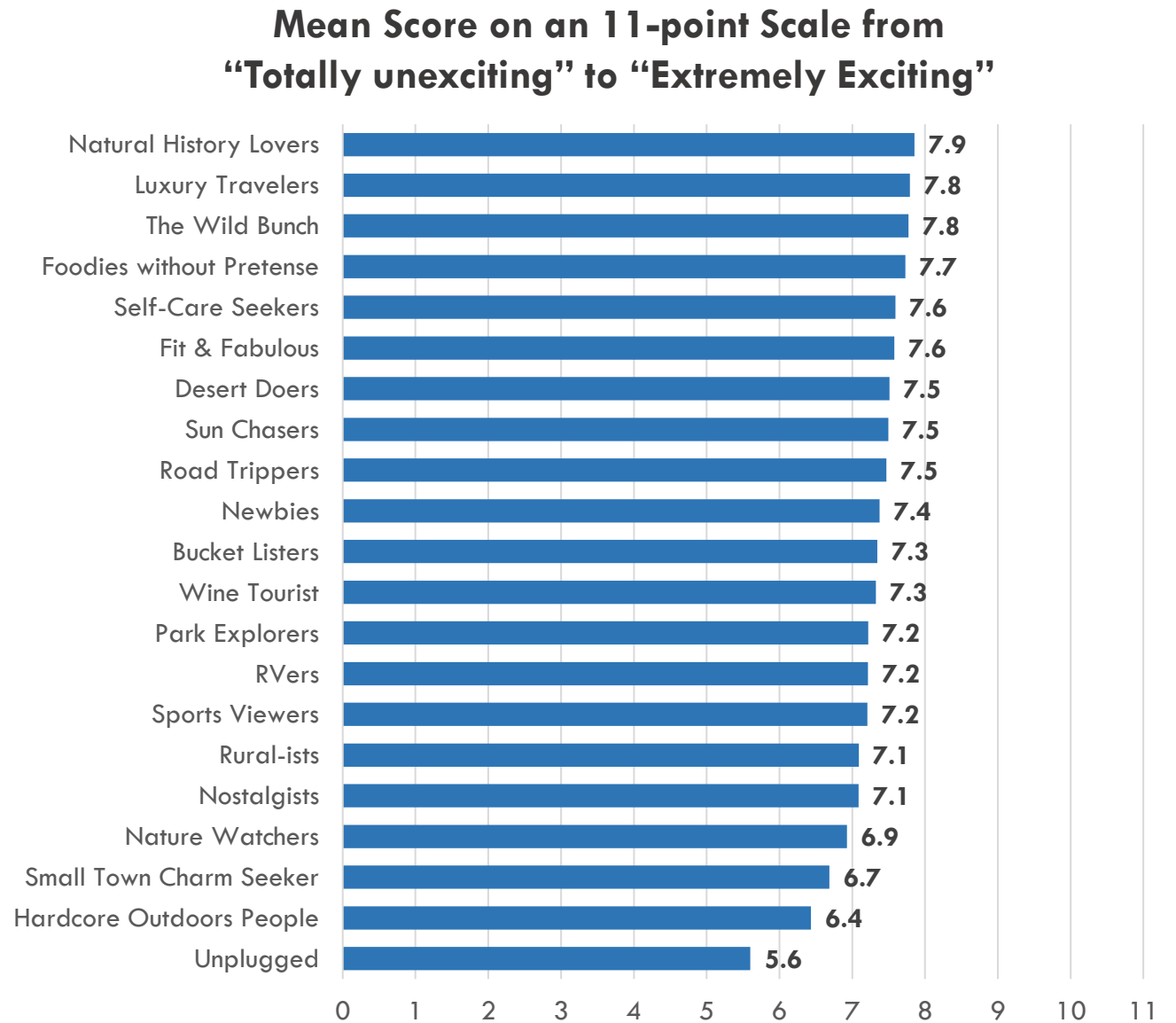
Likelihood to take a leisure trip to Arizona in the next 3 years

Top 2 Box Score (% who are “Likely” or “Extremely likely”)



Question: In the NEXT THREE (3) YEARS, how likely are you to take a leisure trip anywhere in the State of Arizona?

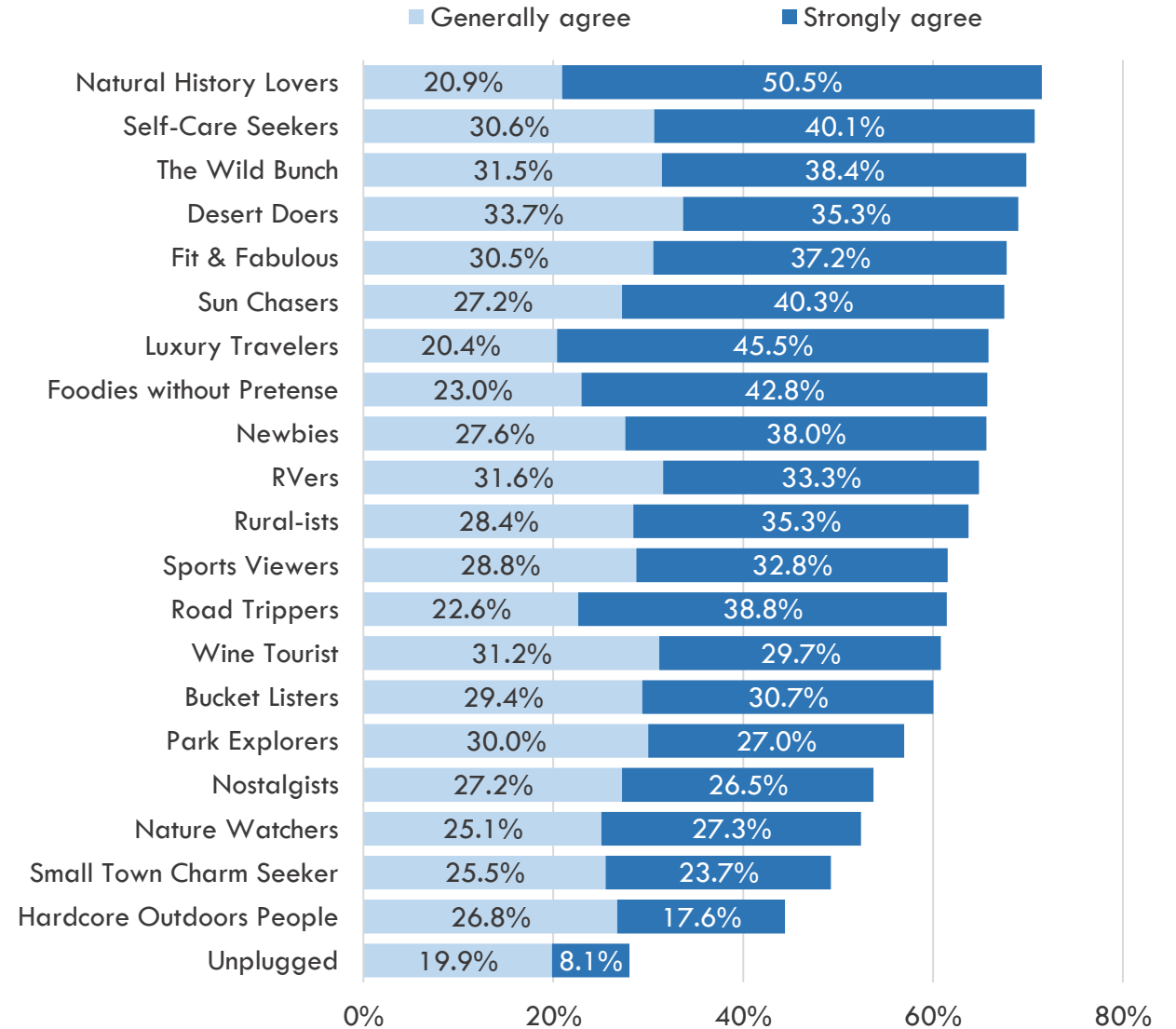
Level of excitement to take a leisure trip to Arizona



Question: How exciting would you find the idea of taking a leisure trip to the State of Arizona? Please use the eleven-point scale below, where 0 means “Totally unexciting” and 10 equals a “Extremely exciting”

Agreement with “Arizona is Perfect for Me”

Top 2 Box Score (% who “Generally Agree” or “Strongly Agree”)

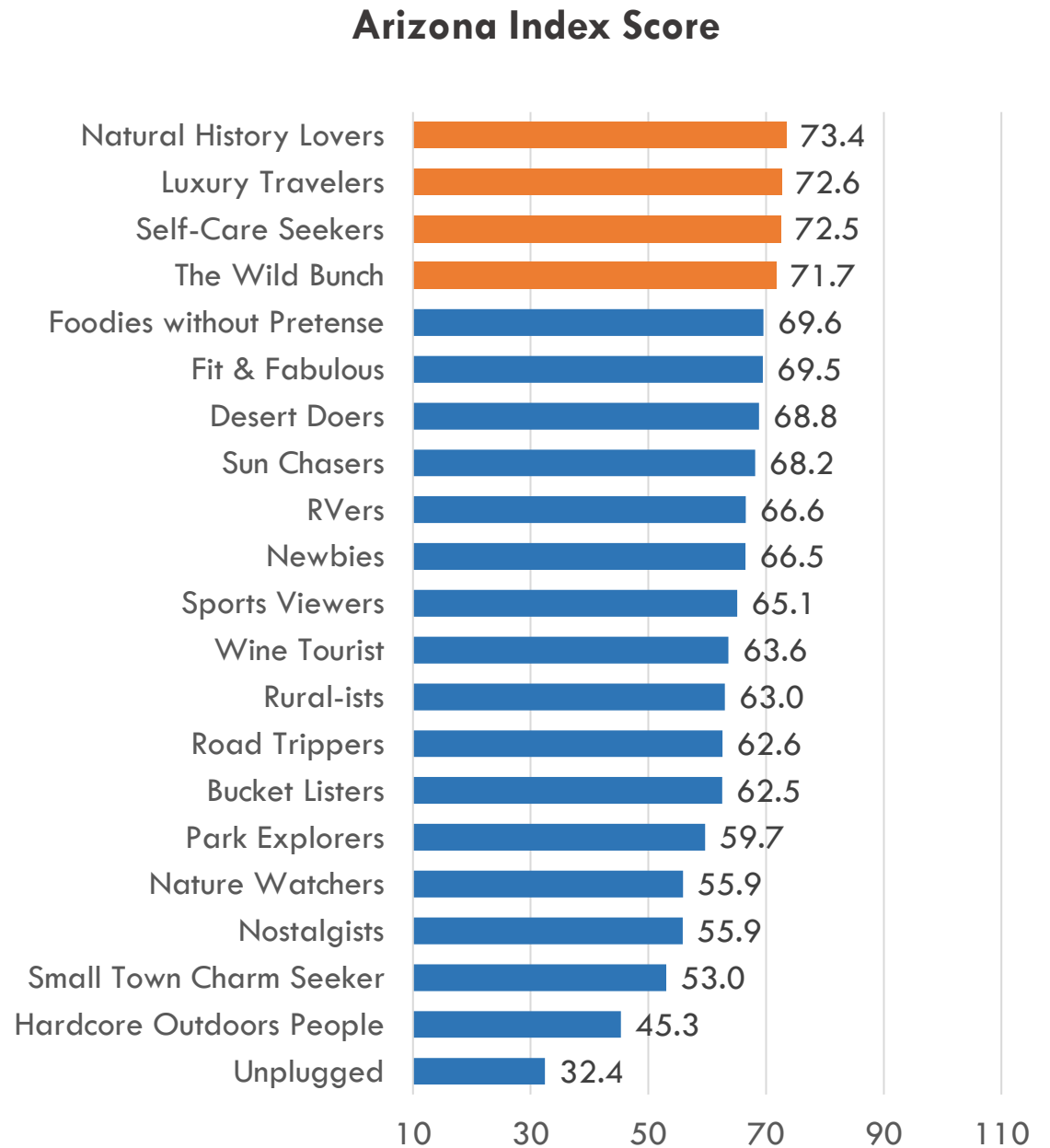


Question: How much do you agree with the following statement? An Arizona vacation is a perfect fit for travelers like me.

A x B + C = ARIZONA HIGH VALUE INDEX

$$\left(\begin{array}{l} \text{Likelihood to take} \\ \text{a leisure trip to} \\ \text{Arizona in the next} \\ \text{3 years} \end{array} \right) \times \left(\begin{array}{l} \text{Excitement to} \\ \text{take a leisure trip} \\ \text{to Arizona} \end{array} \right) + \left(\begin{array}{l} \text{Agreement with} \\ \text{"Arizona is} \\ \text{Perfect for Me"} \end{array} \right) = 110 \text{ Point Scale}$$

Arizona High Value Index Score



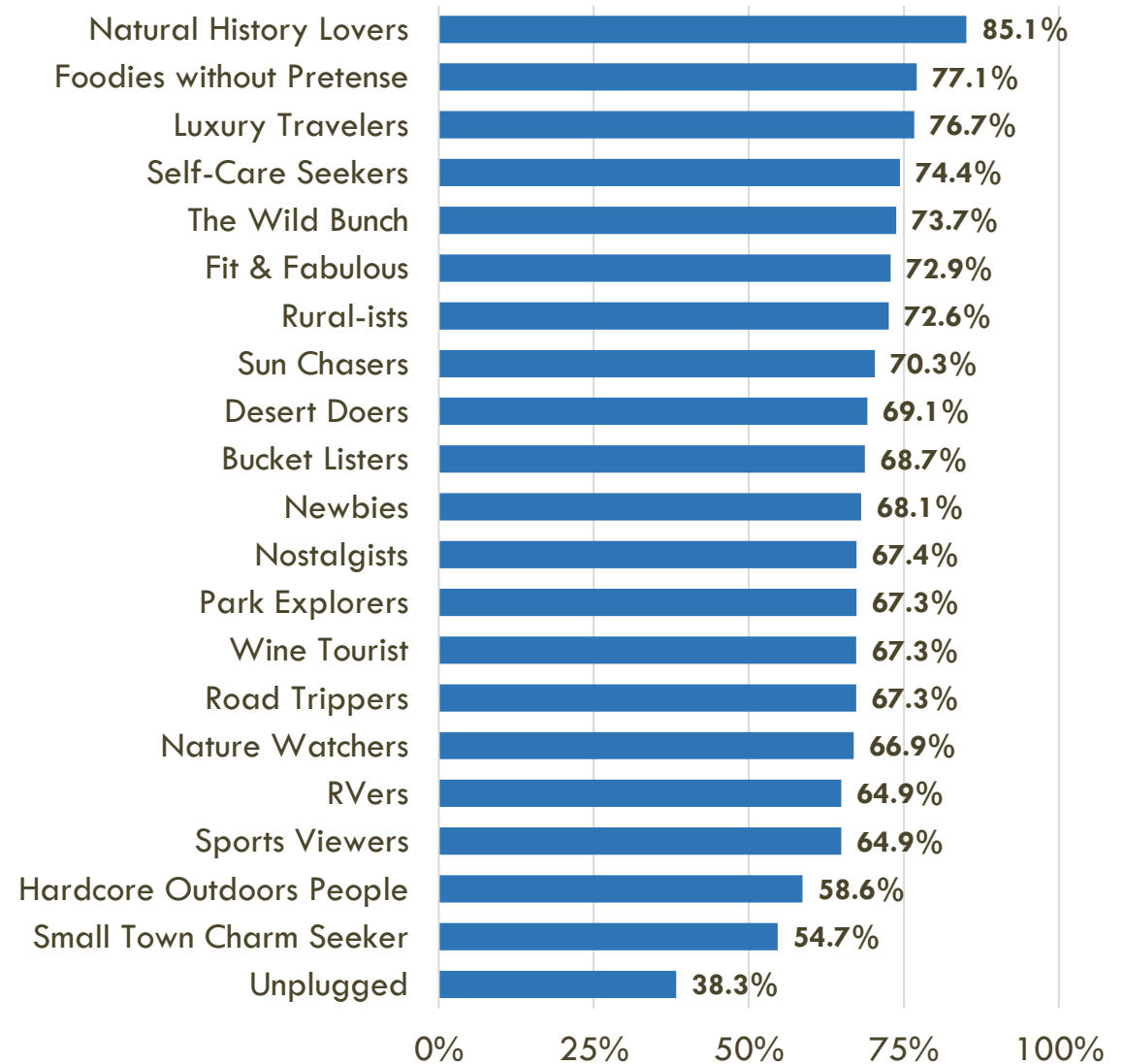
A glass globe is placed on a bed of green moss. The globe's surface is highly reflective, mirroring a dense forest scene with tall trees and a bright light source, possibly the sun, creating a lens flare effect. The background is a soft-focus forest with green foliage.

SUSTAINABILITY INDEX METRICS FOR EACH PERSONA

Agreement with

“It is important that I
travel in a manner that
protects the environment”

Top 2 Box Score (% who are “Generally agree” or “Strongly agree”)

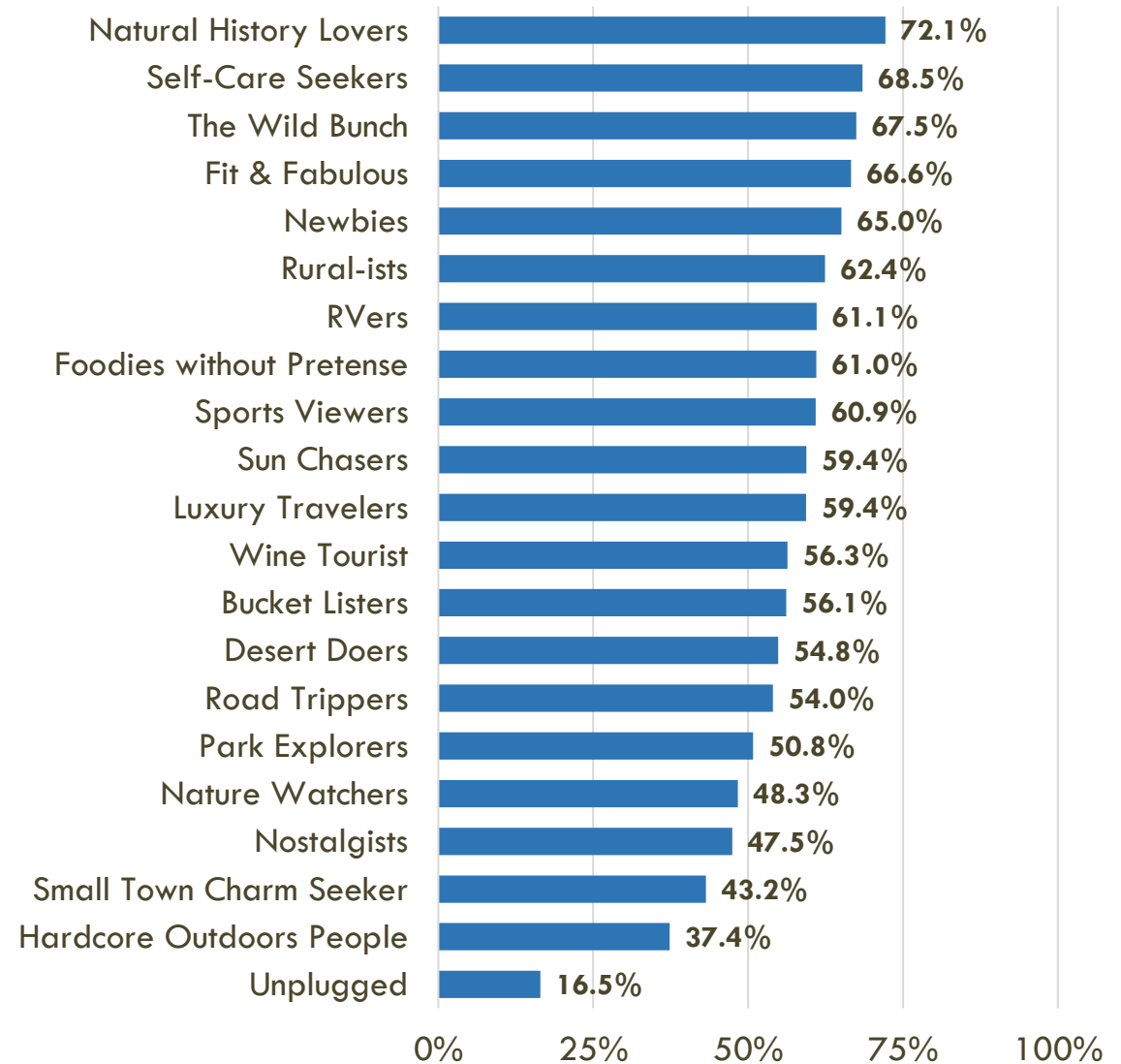


Question: How much do you agree with the following statement? It is important that I travel in a manner that protects the environment.

Agreement with

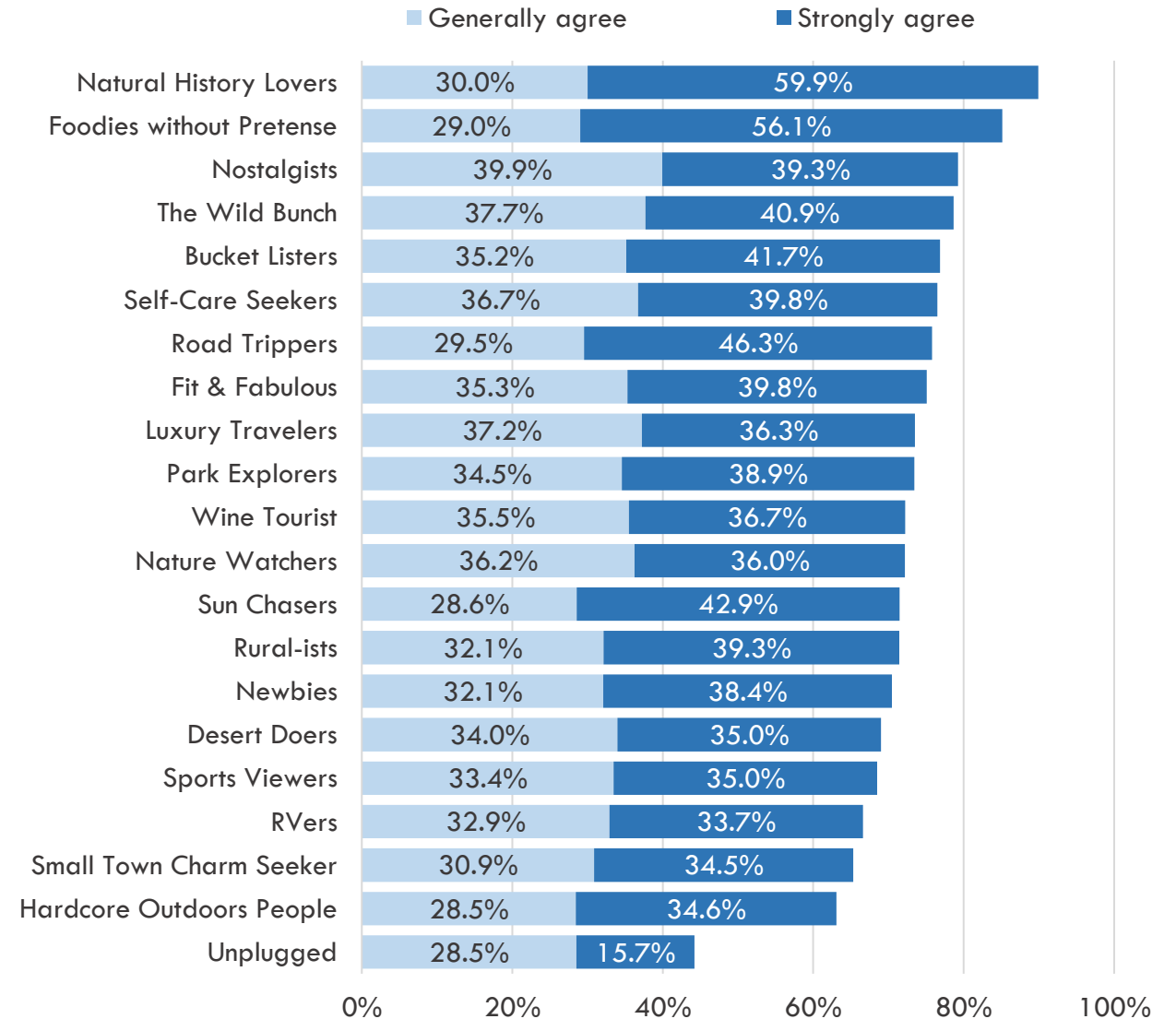
“I frequently make travel decisions purposefully to protect the environment of the places I visit”

Top 2 Box Score (% who are “Generally agree” or “Strongly agree”)



Question: How much do you agree with the following statement? I frequently make travel decisions purposefully to protect the environment of the places I visit.

Top 2 Box Score (% who “Generally Agree” or “Strongly Agree”)



Question: How much do you agree with the following statement? It is important that I travel in a manner that respects the cultural values of the places I visit.

Agreement with
“It is important that I travel
in a manner that respects
the cultural values of
the places I visit”

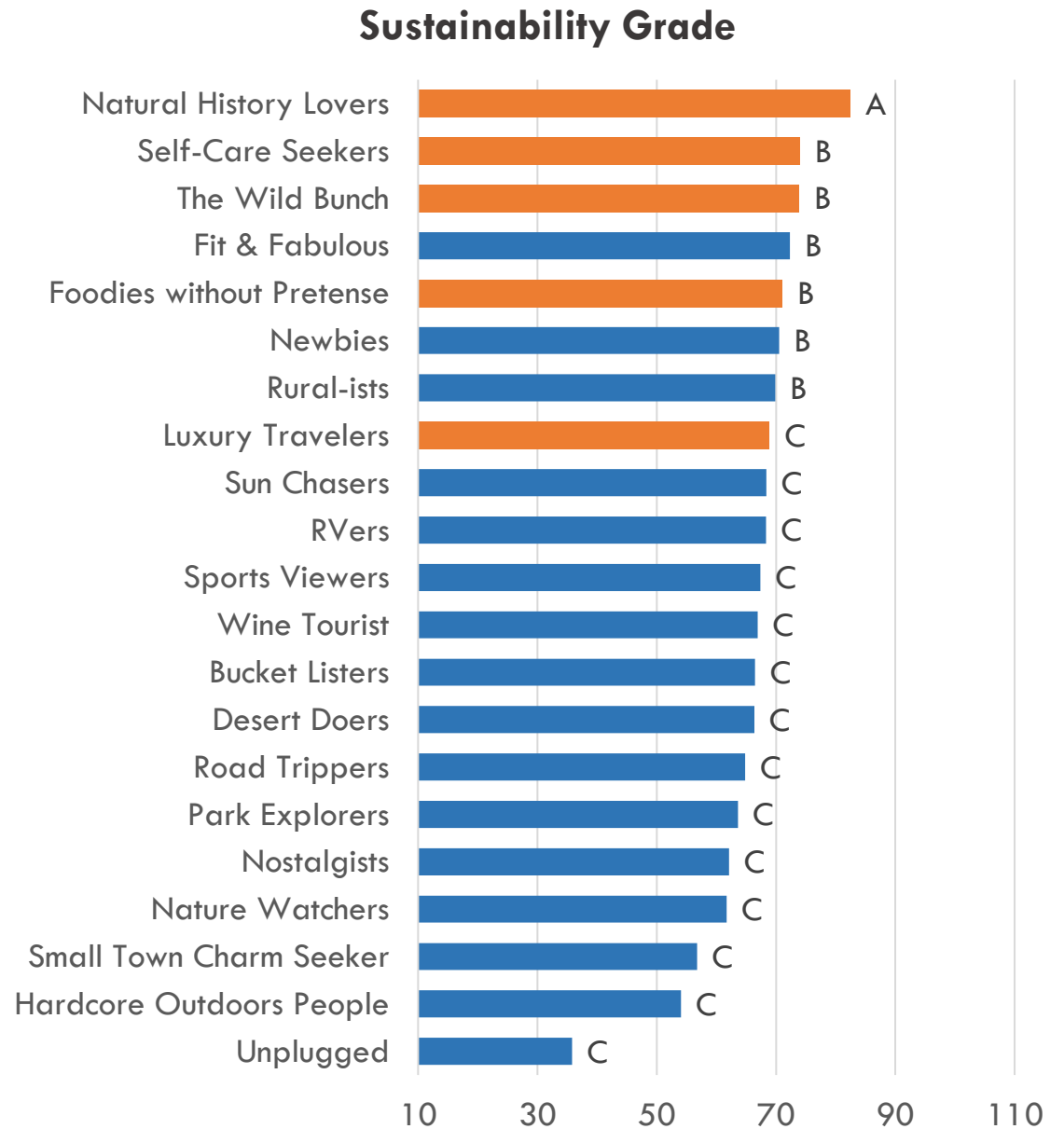
A x B + C = SUSTAINABILITY INDEX

$$\left(\begin{array}{c} \text{Agreement with "It is} \\ \text{important that I travel in a} \\ \text{manner that protects the} \\ \text{environment"} \end{array} \right) \times \left(\begin{array}{c} \text{Agreement with "I} \\ \text{frequently make travel} \\ \text{decisions purposefully to} \\ \text{protect the environment} \\ \text{of the places I visit"} \end{array} \right) + \left(\begin{array}{c} \text{Agreement with "It is} \\ \text{important that I travel in} \\ \text{a manner that respects} \\ \text{the cultural values of} \\ \text{the places I visit"} \end{array} \right) = 110 \text{ Point Scale}$$

GRADING SCORE

$$A = \geq 80 \mid B = 70-79 \mid C = \leq 69$$

Sustainability Grade



A person wearing a backpack and a hat stands on a rocky ledge, looking down at a vibrant green pool of water nestled within a deep, layered canyon. The surrounding rock walls are rugged and show distinct horizontal geological strata. The scene is captured from a high angle, emphasizing the scale and depth of the canyon.

HIGHEST VALUE PERSONAS RECOMMENDED FOR ARIZONA

HIGHEST VALUE PERSONAS RECOMMENDED FOR ARIZONA



**Natural
History
Lovers**



**Luxury
Travelers**



**Self-Care
Seekers**



**Wild
Bunch**



**Foodies
Without
Pretense**

NATURAL HISTORY LOVERS

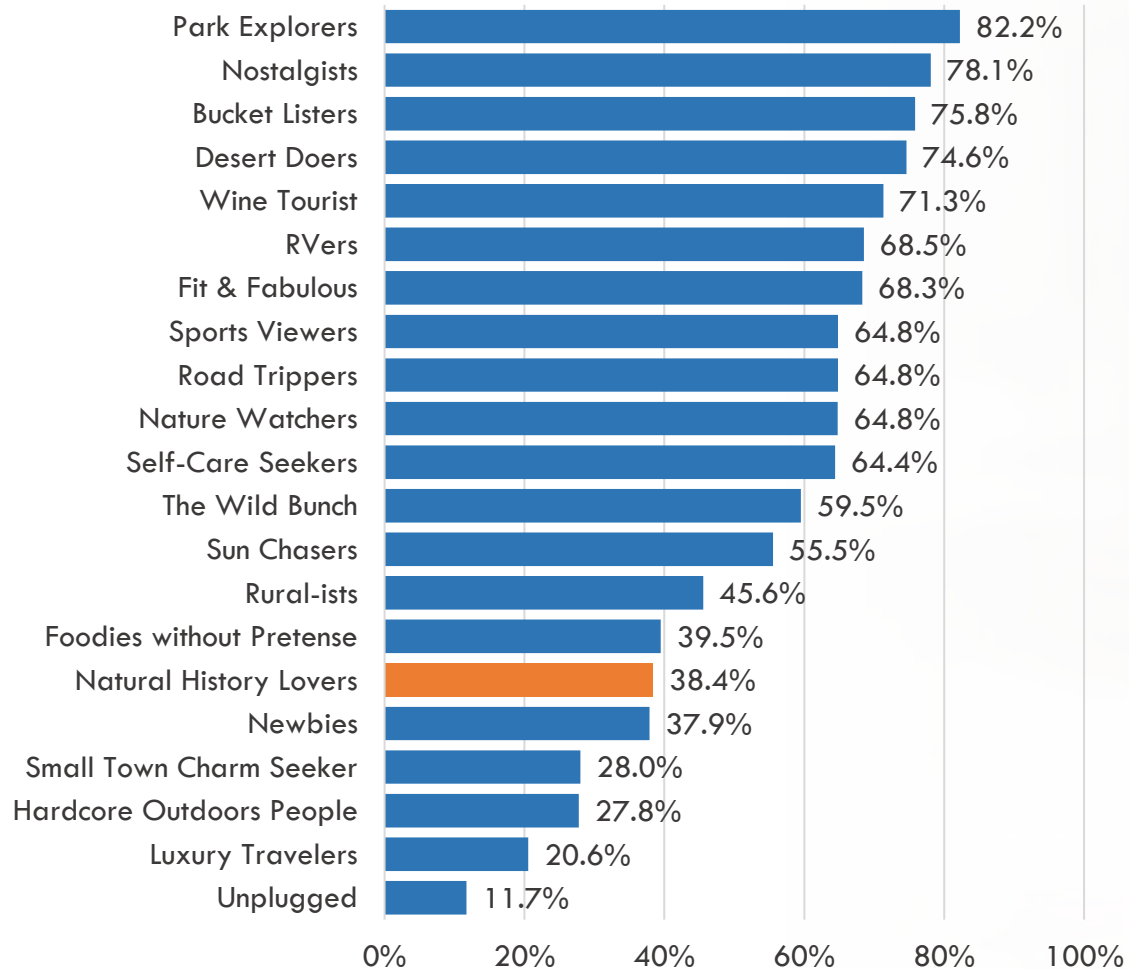
These travelers seek out destinations with geographic, human and/or other biological significance.

- **38.4%** are high potential for Arizona (80 or higher index score)
- Average Arizona Index Score of **73.4**
- A grade of “**A**” for sustainability
- **71.5%** “generally agree” or “strongly agree” an Arizona vacation is a perfect fit for them
- Have taken **3.9** leisure trips (of at least 100 miles round-trip from their home) in the past 3 years
- Have taken **2.7** leisure trips primarily to visit a sunny, warm weather destination in the past 2 years
- Have **16.3** days available for leisure travel in the next 12 months
- Expects to spend **\$247.49** per person, per day for a domestic leisure trip

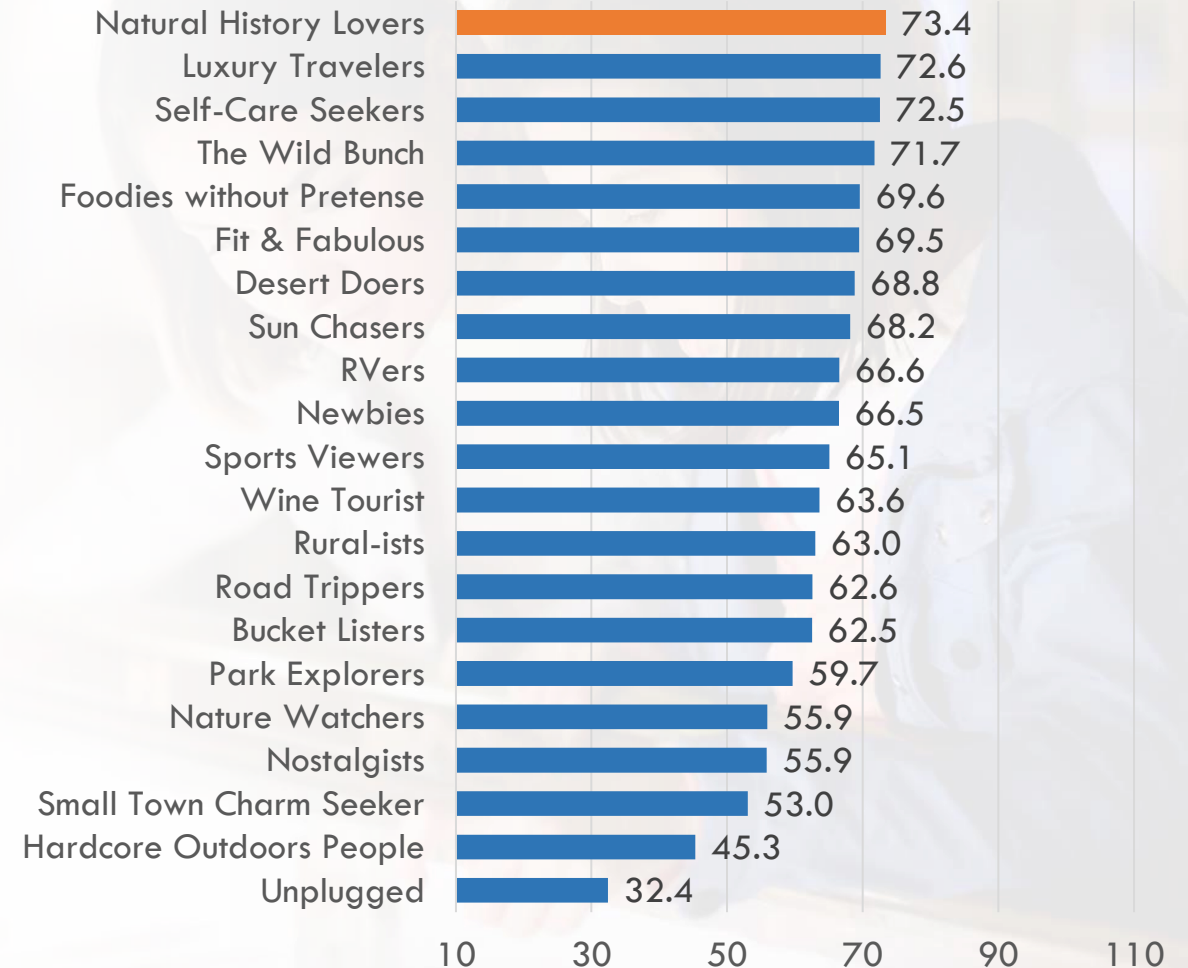
NATURAL HISTORY LOVERS

Proportion Who are High Potential for Arizona

(80 or higher index score)

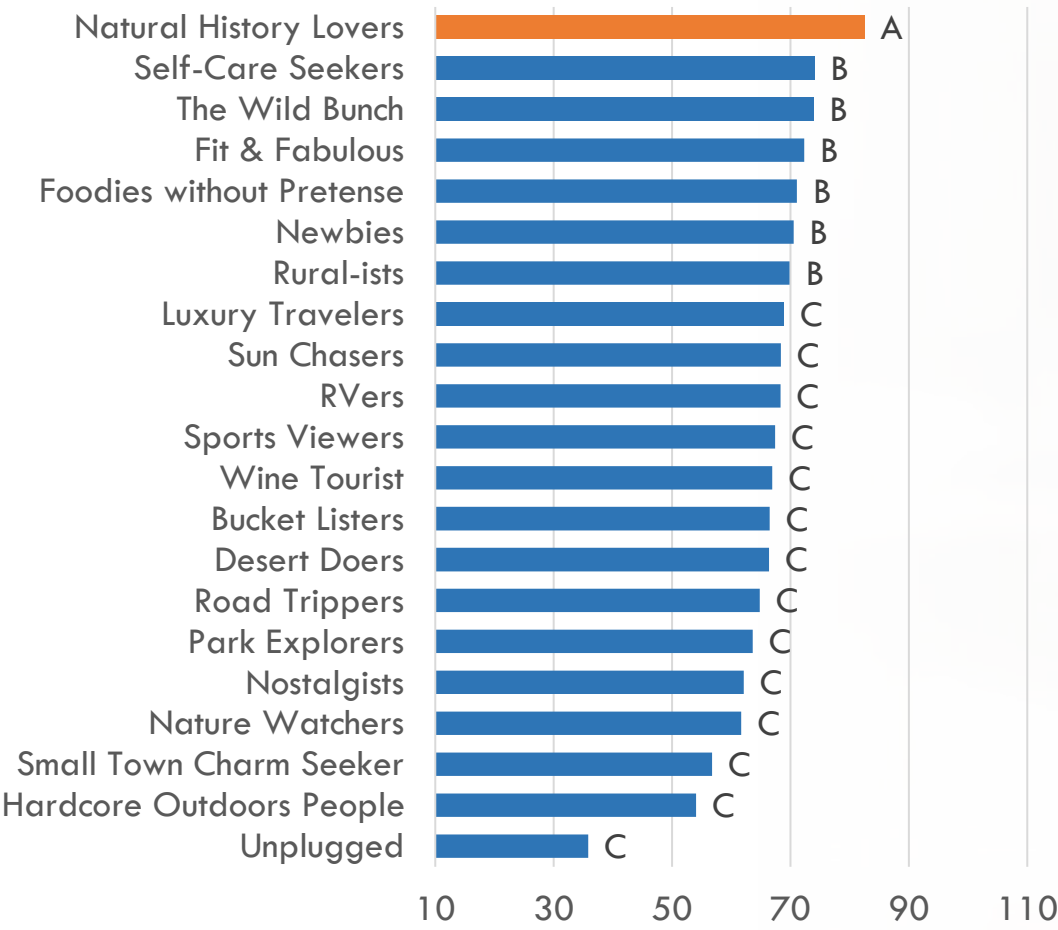


Arizona Index Score



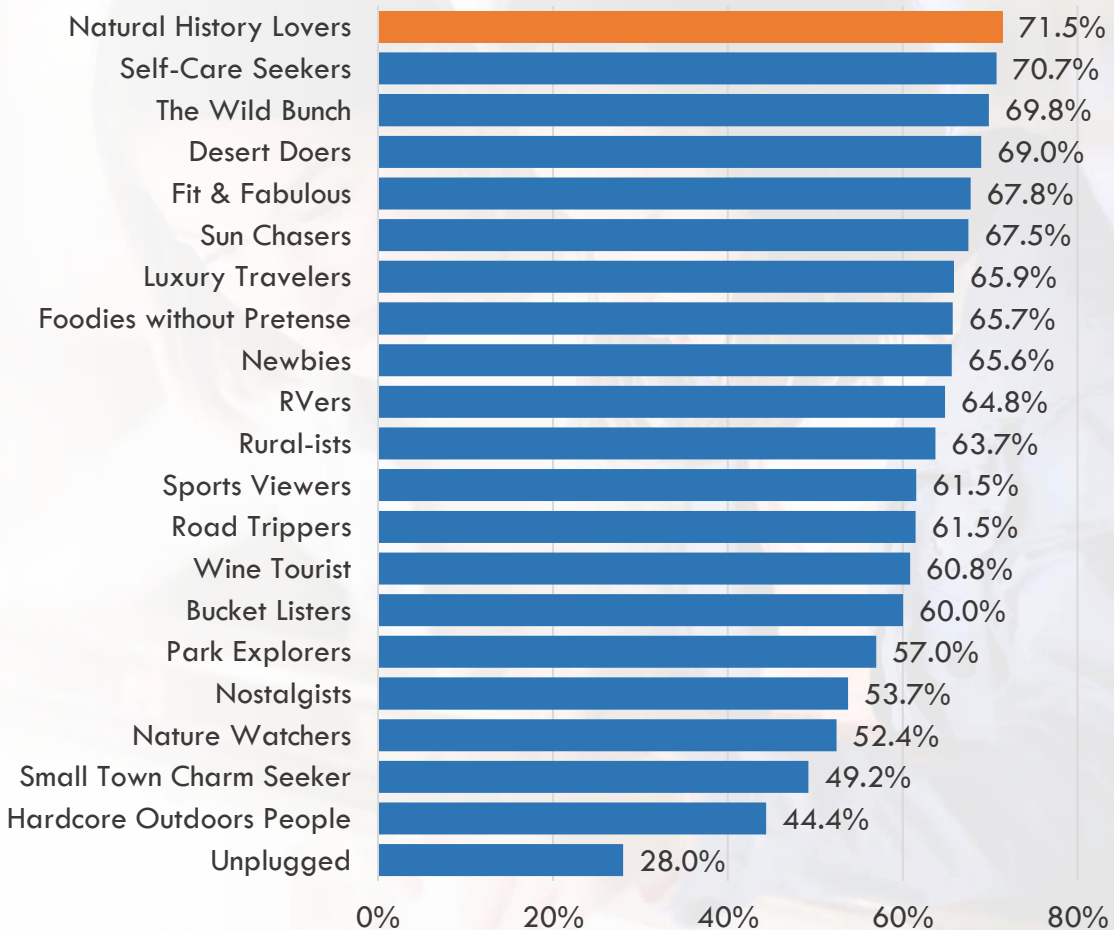
NATURAL HISTORY LOVERS

Sustainability Grade



“An Arizona Vacation is a Perfect Fit for Me”

Top 2 Box Score—% who “Generally Agree” or “Strongly Agree”

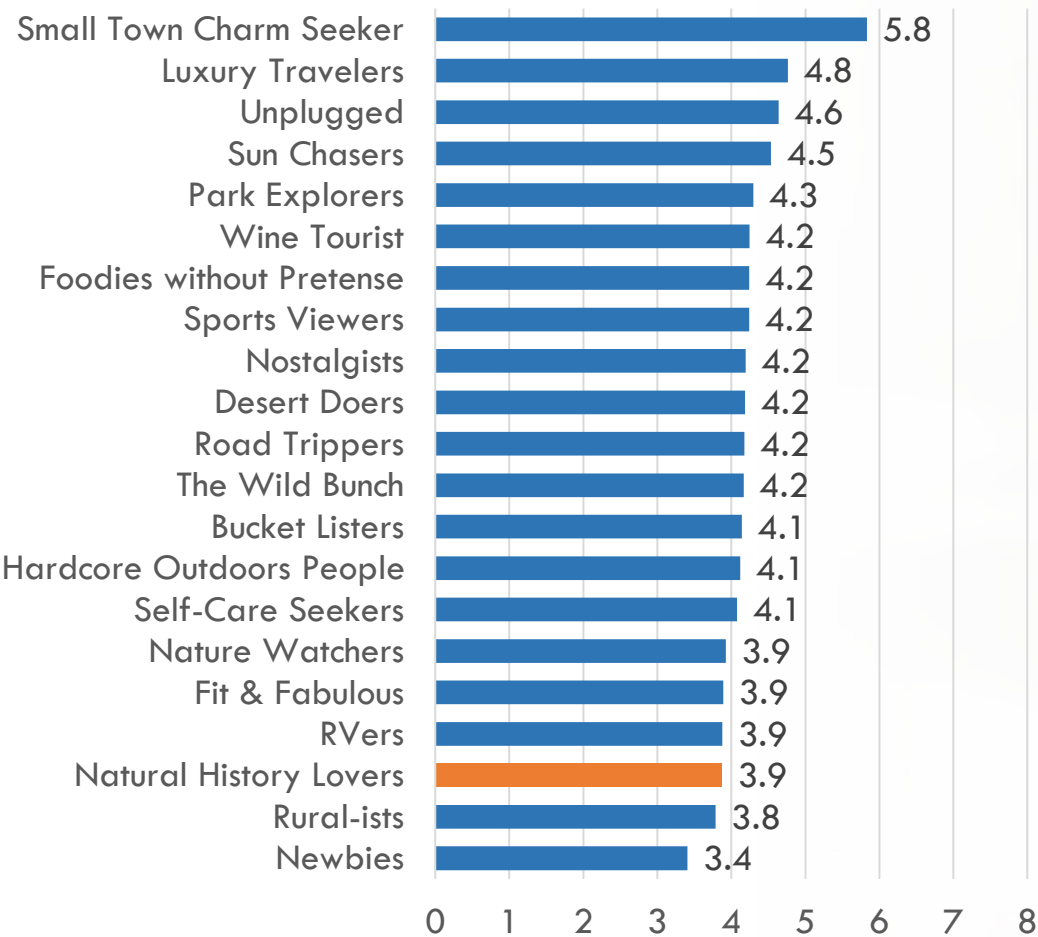


Question: How much do you agree with the following statement? An Arizona vacation is a perfect fit for travelers like me.

NATURAL HISTORY LOVERS

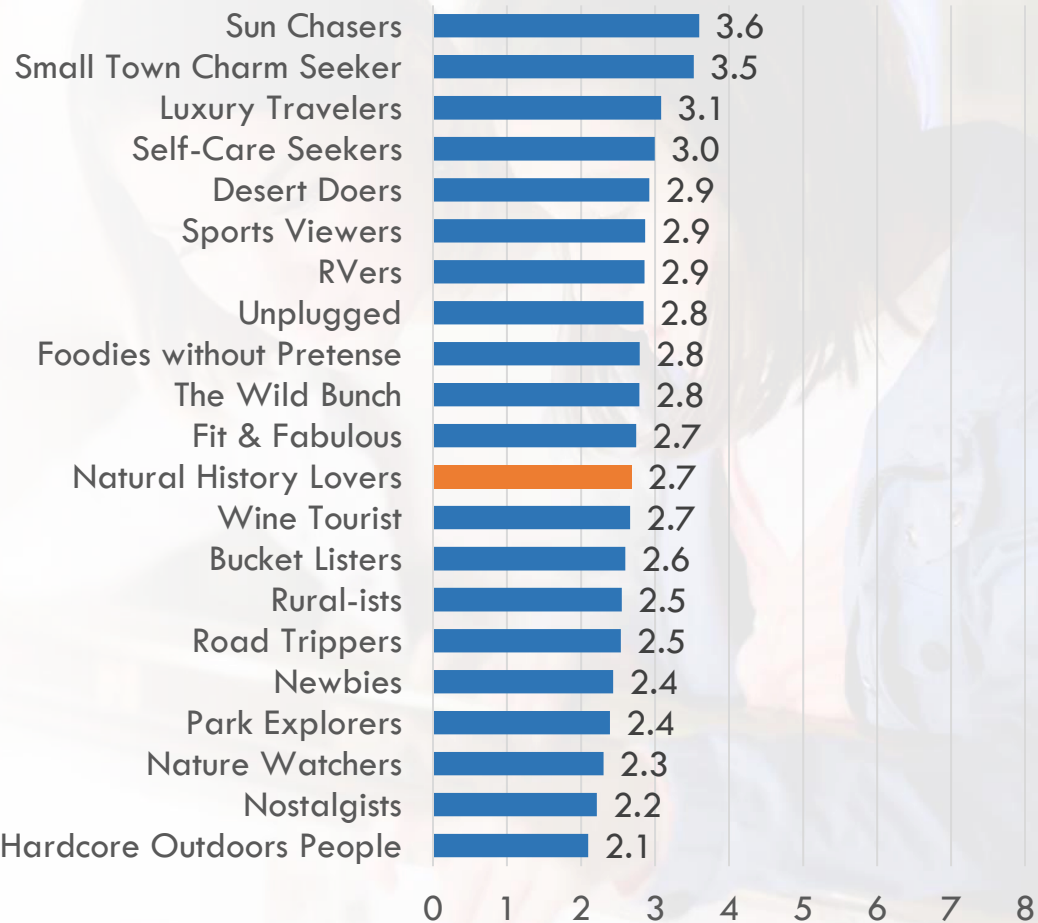
Number of Leisure Trips in the Past 3 Years

(of at least 100 miles round-trip from home)



Question: In the PAST THREE (3) YEARS, how many leisure trips (of at least 100 miles round-trip from your home) have you made?

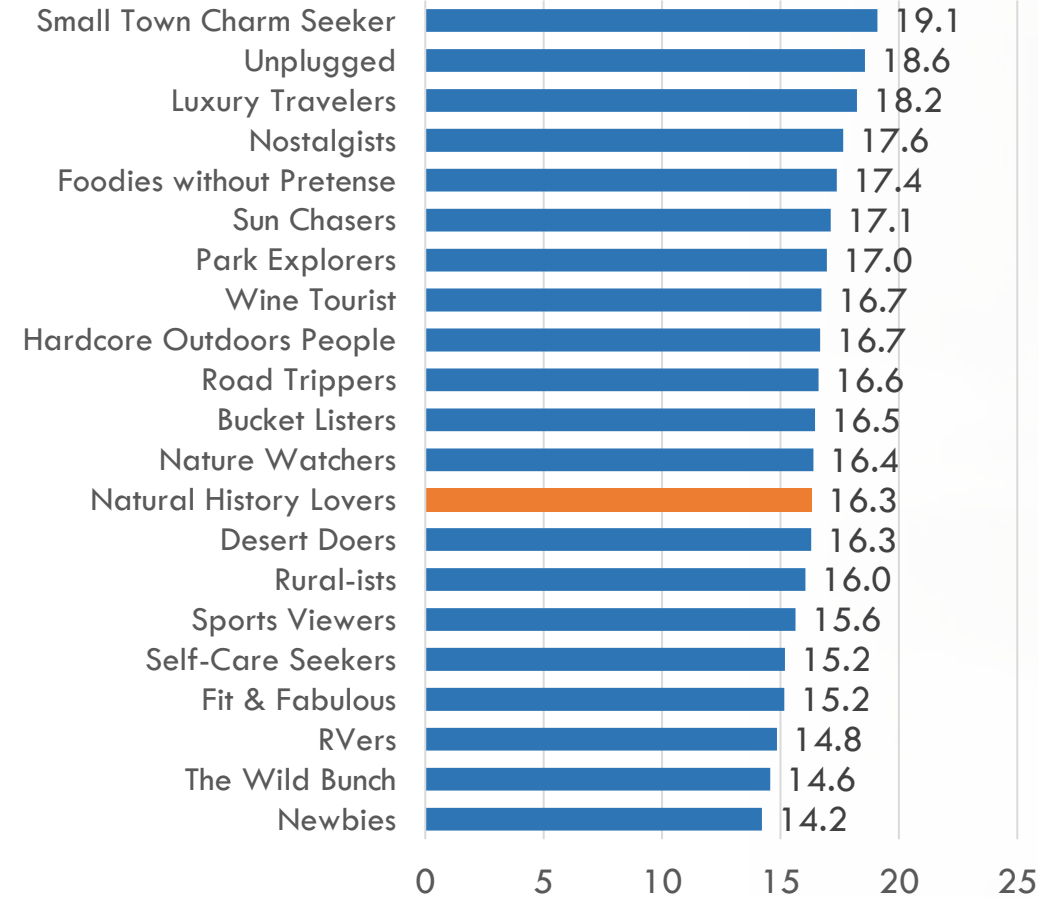
Number of Leisure Trips to Sunny, Warm Weather Destinations in the Past 2 Years



Question: In the PAST TWO (2) YEARS, how many leisure trips did you take primarily to visit a sunny, warm weather destination?

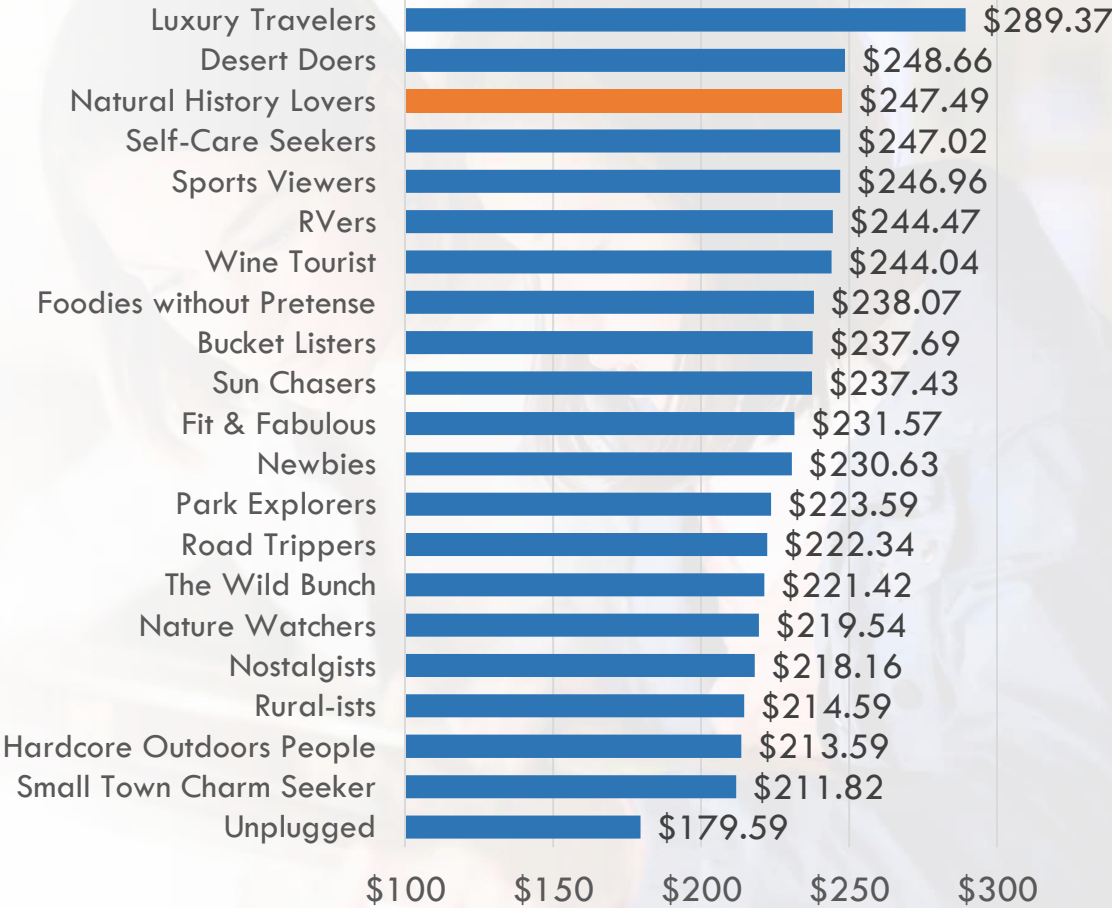
NATURAL HISTORY LOVERS

Number of Days Available for Leisure Travel
In the Next 12 Months



Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

Expected Daily Spend Per Person, Per Day



Question: EXCLUDING AIRFARE, on a typical week-long domestic leisure trip, how much would you expect to spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.)? How many people would this spending usually cover?

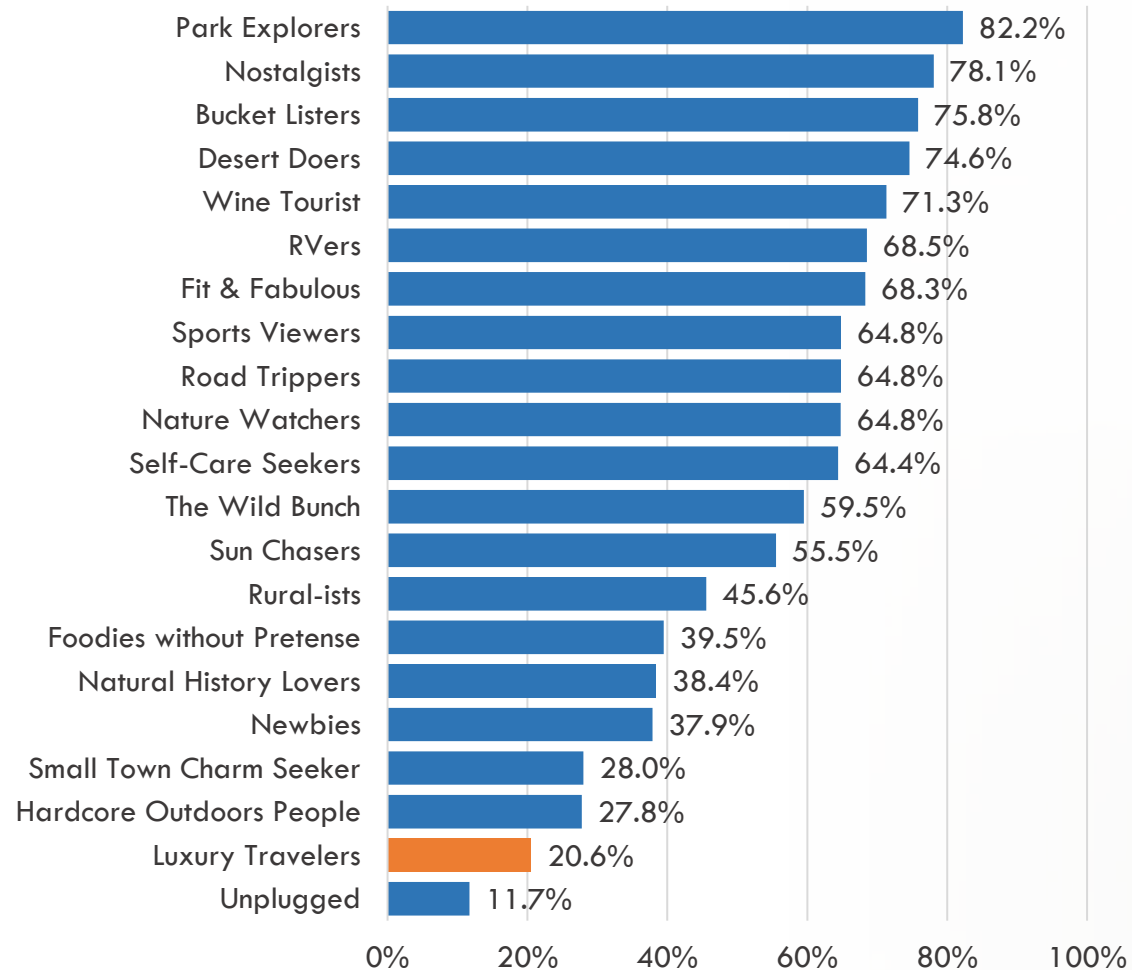
LUXURY TRAVELERS

These travelers select destinations based on luxury travel options and can afford them.

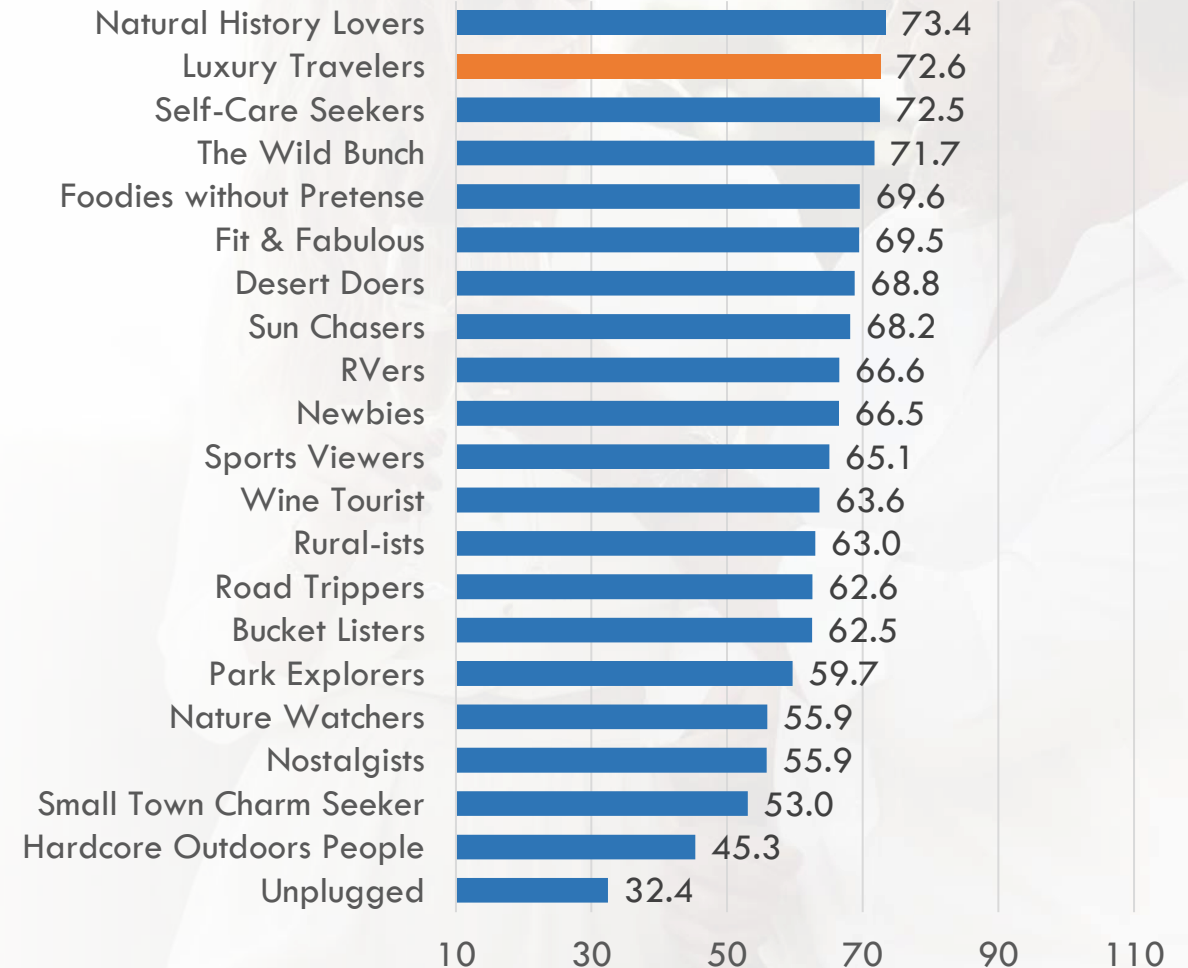
- **20.6%** are high potential for Arizona (80 or higher index score)
- Average Arizona Index Score of **72.6**
- A grade of “**C**” for sustainability
- **65.9%** “generally agree” or “strongly agree” an Arizona vacation is a perfect fit for them
- Have taken **4.8** leisure trips (of at least 100 miles round-trip from their home) in the past 3 years
- Have taken **3.1** leisure trips primarily to visit a sunny, warm weather destination in the past 2 years
- Have **18.2** days available for leisure travel in the next 12 months
- Expects to spend **\$289.37** per person, per day for a domestic leisure trip

LUXURY TRAVELERS

Proportion Who are High Potential for Arizona
(80 or higher index score)

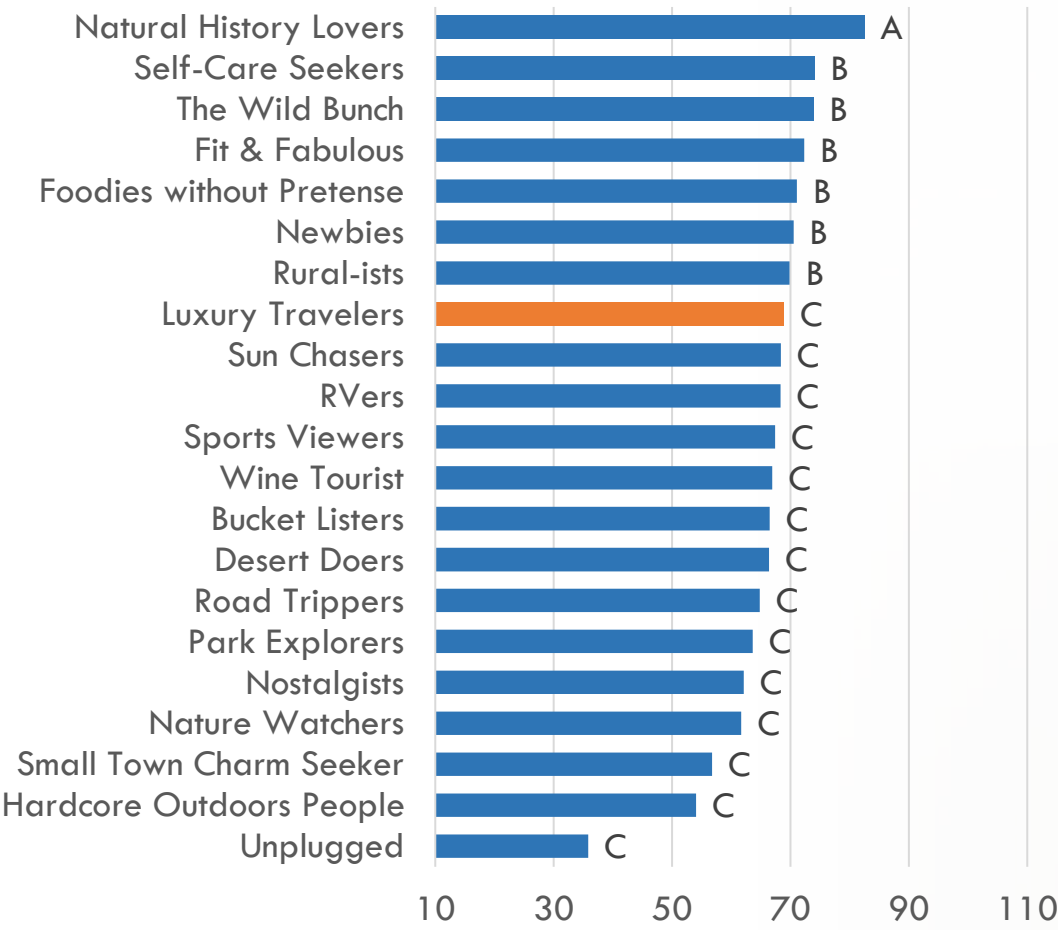


Arizona Index Score



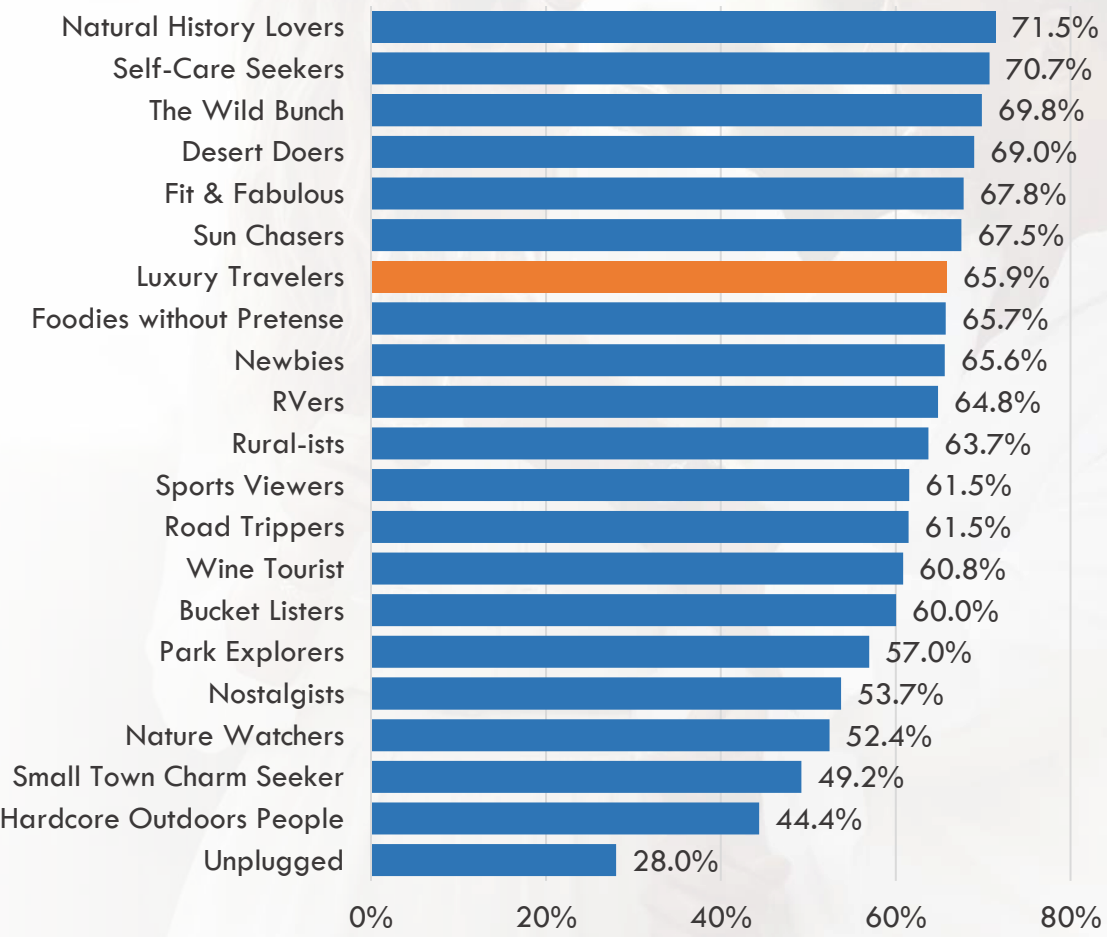
LUXURY TRAVELERS

Sustainability Grade



“An Arizona Vacation is a Perfect Fit for Me”

Top 2 Box Score—% who “Generally Agree” or “Strongly Agree”

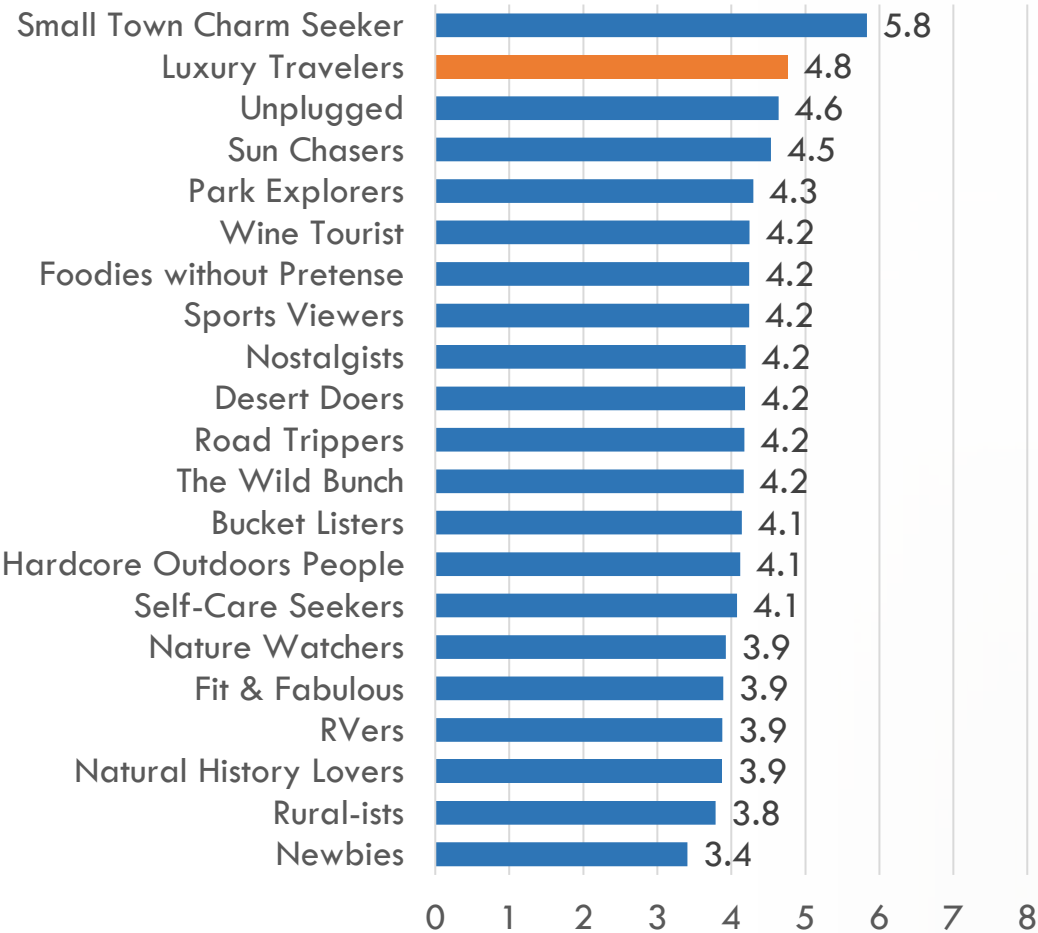


Question: How much do you agree with the following statement? An Arizona vacation is a perfect fit for travelers like me.

LUXURY TRAVELERS

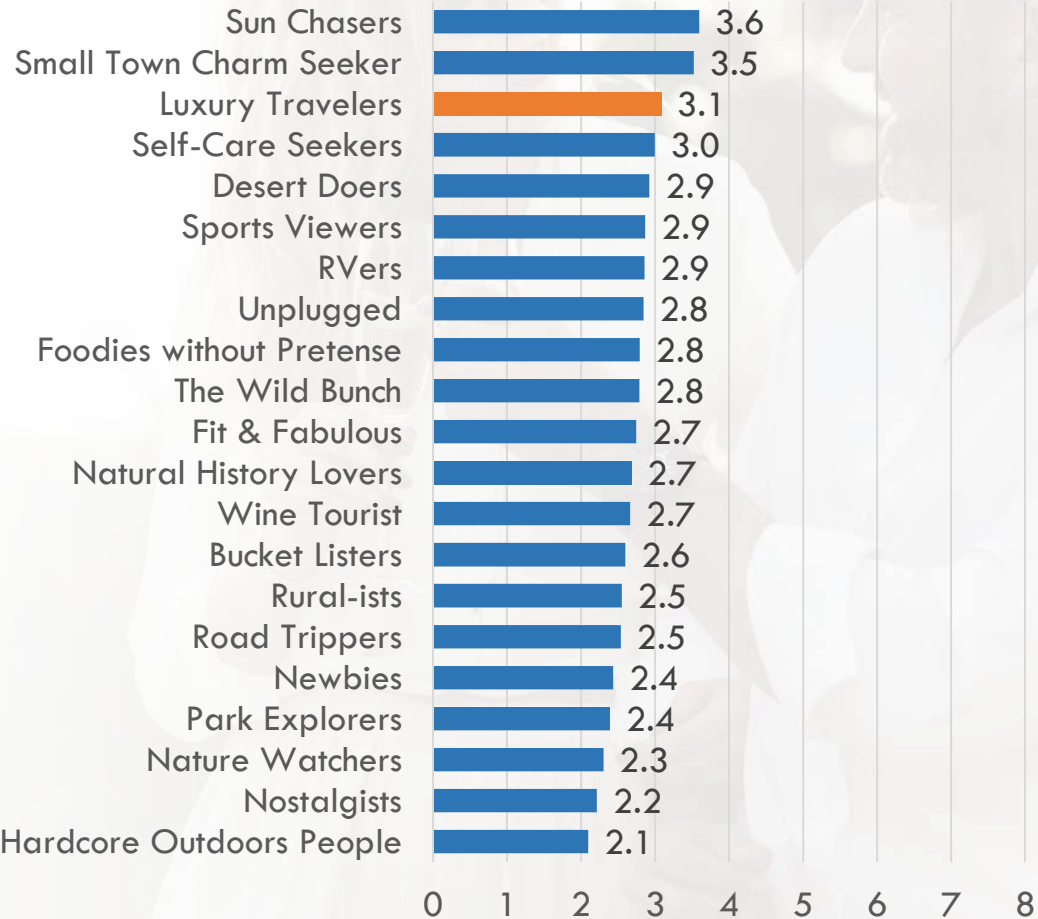
Number of Leisure Trips in the Past 3 Years

(of at least 100 miles round-trip from home)



Question: In the PAST THREE (3) YEARS, how many leisure trips (of at least 100 miles round-trip from your home) have you made?

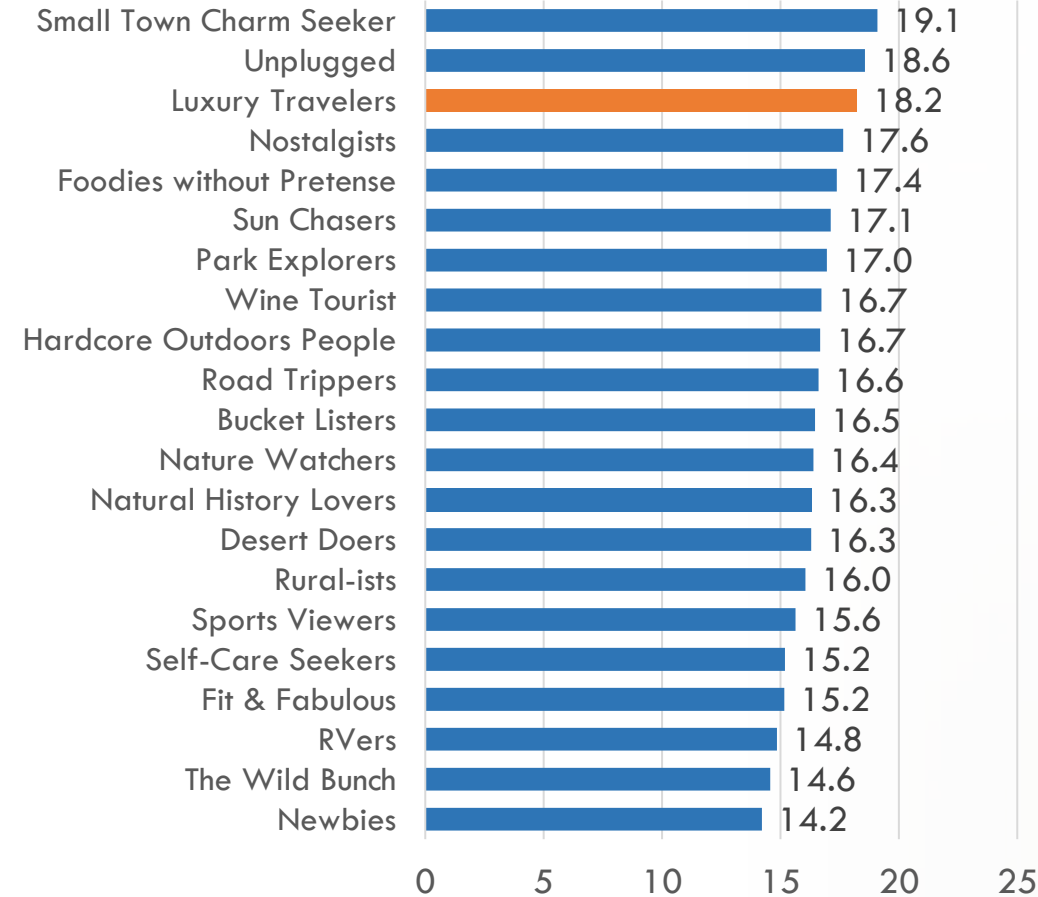
Number of Leisure Trips to Sunny, Warm Weather Destinations in the Past 2 Years



Question: In the PAST TWO (2) YEARS, how many leisure trips did you take primarily to visit a sunny, warm weather destination?

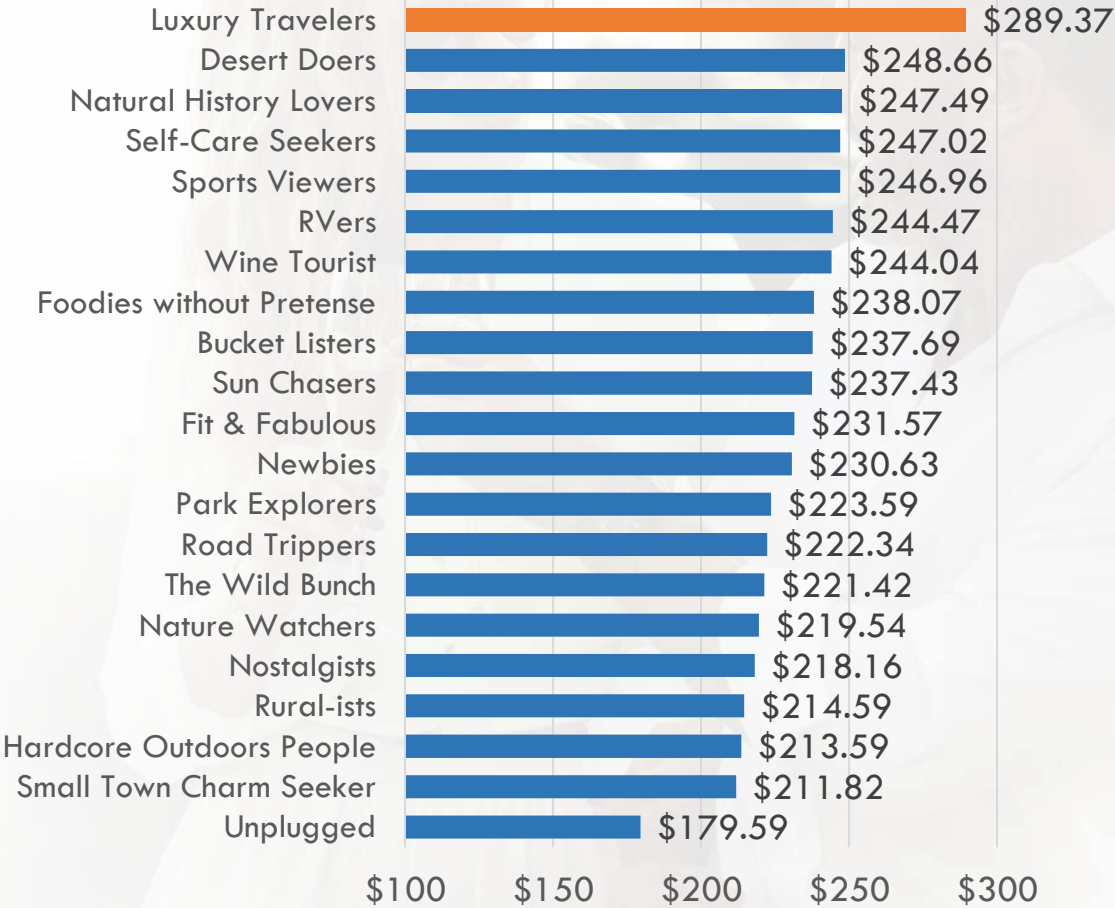
LUXURY TRAVELERS

Number of Days Available for Leisure Travel
In the Next 12 Months



Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

Expected Daily Spend Per Person, Per Day



Question: EXCLUDING AIRFARE, on a typical week-long domestic leisure trip, how much would you expect to spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.)? How many people would this spending usually cover?

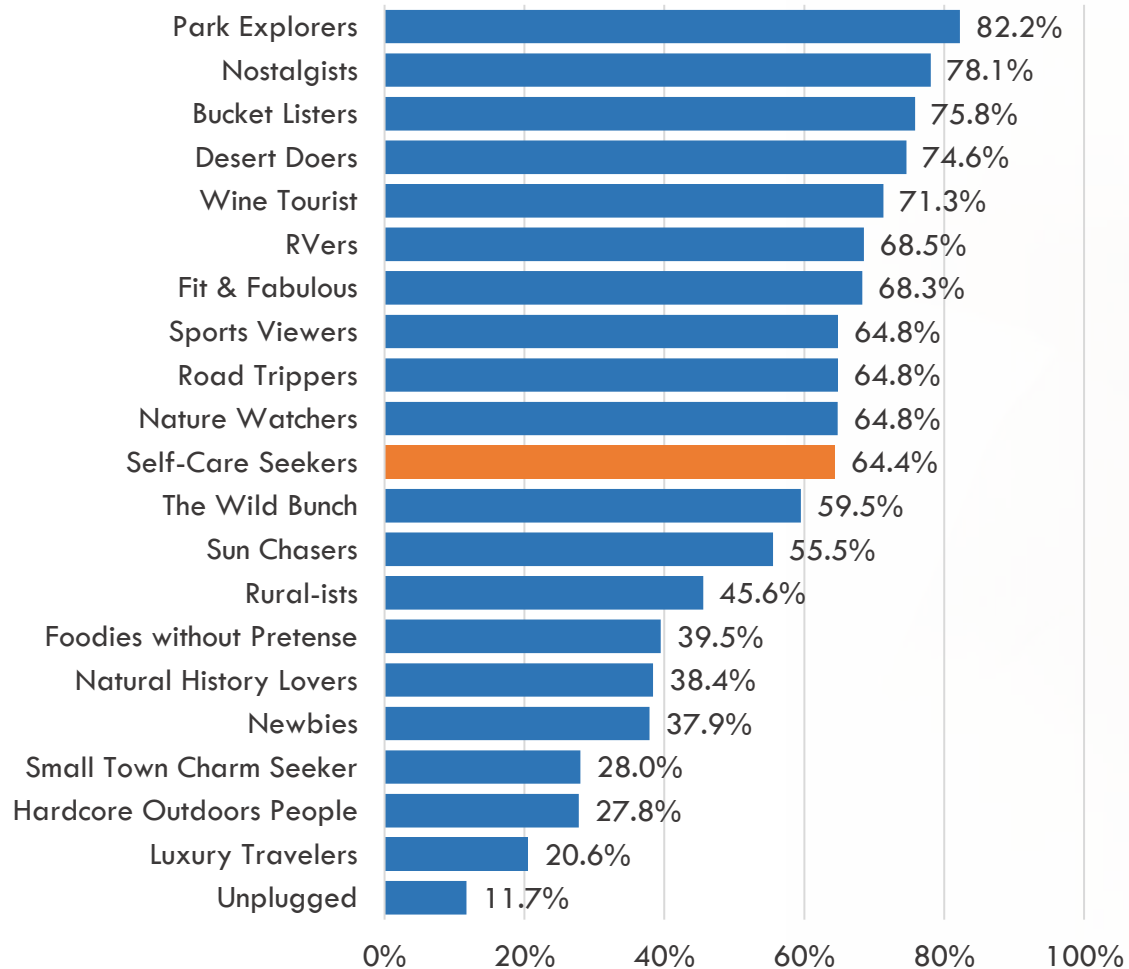
SELF-CARE SEEKERS

Spa treatments are the center pieces of these travelers' trips.

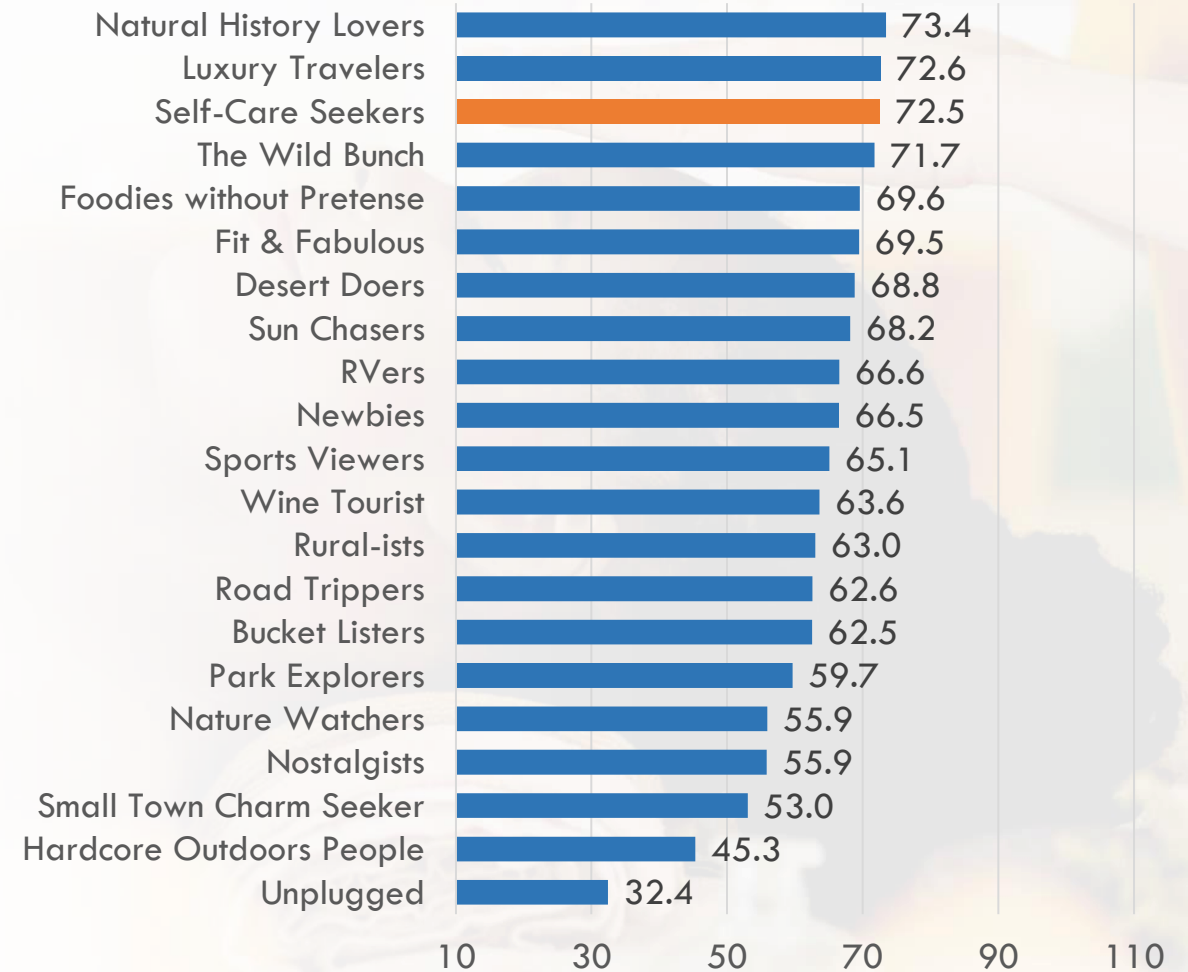
- **64.4%** are high potential for Arizona (80 or higher index score)
- Average Arizona Index Score of **72.5**
- A grade of “**B**” for sustainability
- **70.7%** “generally agree” or “strongly agree” an Arizona vacation is a perfect fit for them
- Have taken **4.1** leisure trips (of at least 100 miles round-trip from their home) in the past 3 years
- Have taken **3.0** leisure trips primarily to visit a sunny, warm weather destination in the past 2 years
- Have **15.2** days available for leisure travel in the next 12 months
- Expects to spend **\$247.02** per person, per day for a domestic leisure trip

SELF-CARE SEEKERS

Proportion Who are High Potential for Arizona
(80 or higher index score)

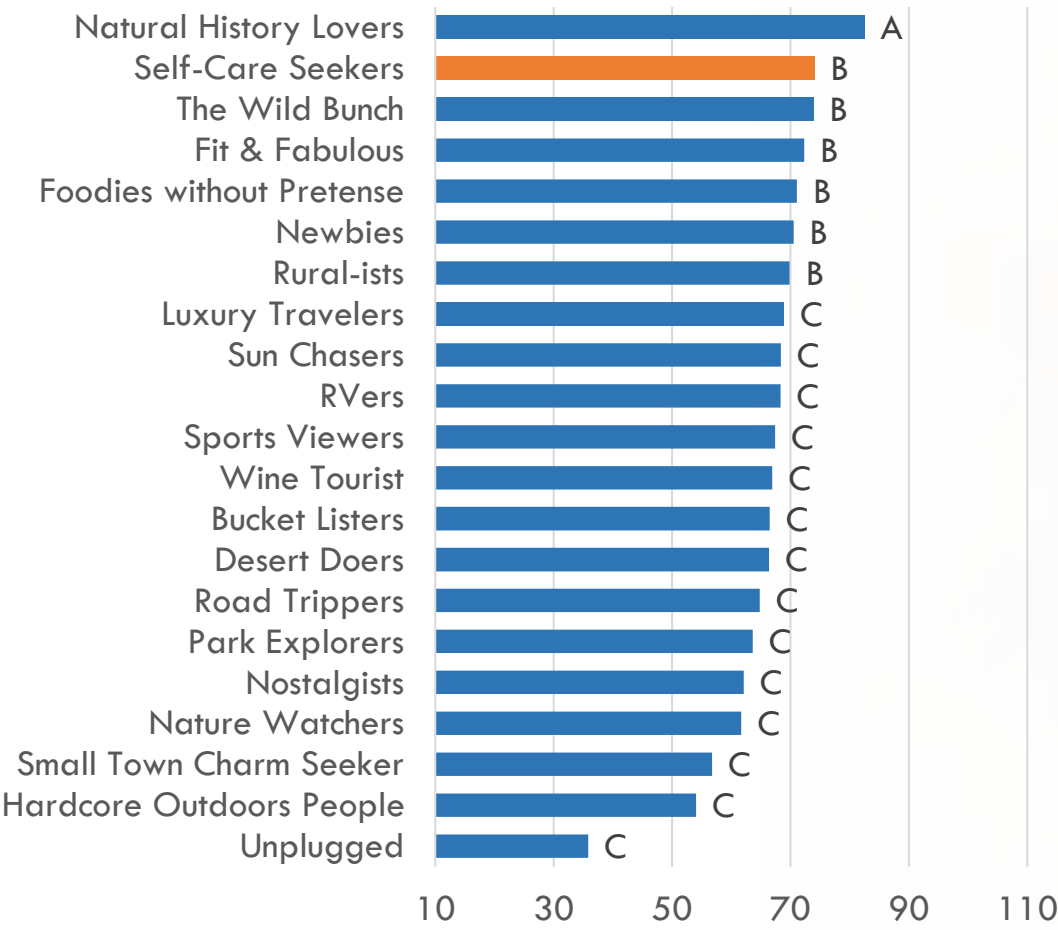


Arizona Index Score



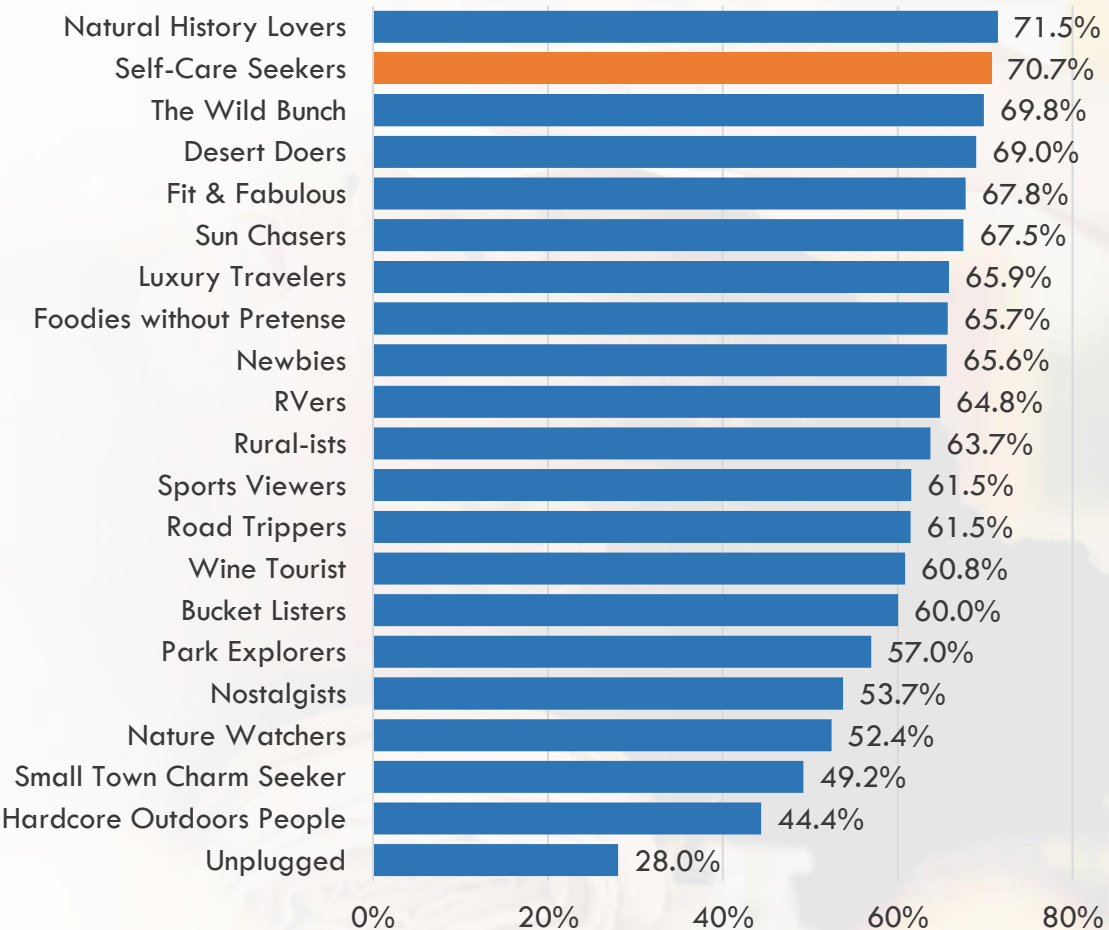
SELF-CARE SEEKERS

Sustainability Grade



“An Arizona Vacation is a Perfect Fit for Me”

Top 2 Box Score—% who “Generally Agree” or “Strongly Agree”

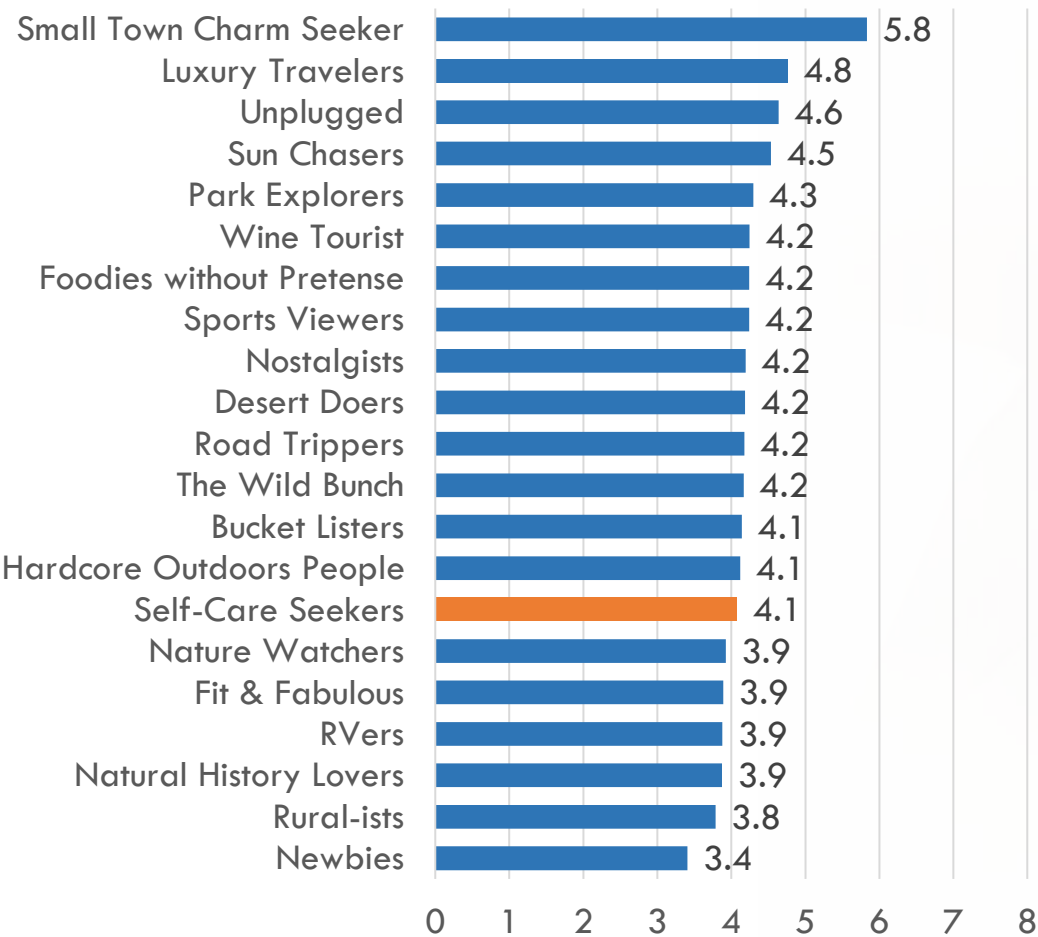


Question: How much do you agree with the following statement? An Arizona vacation is a perfect fit for travelers like me.

SELF-CARE SEEKERS

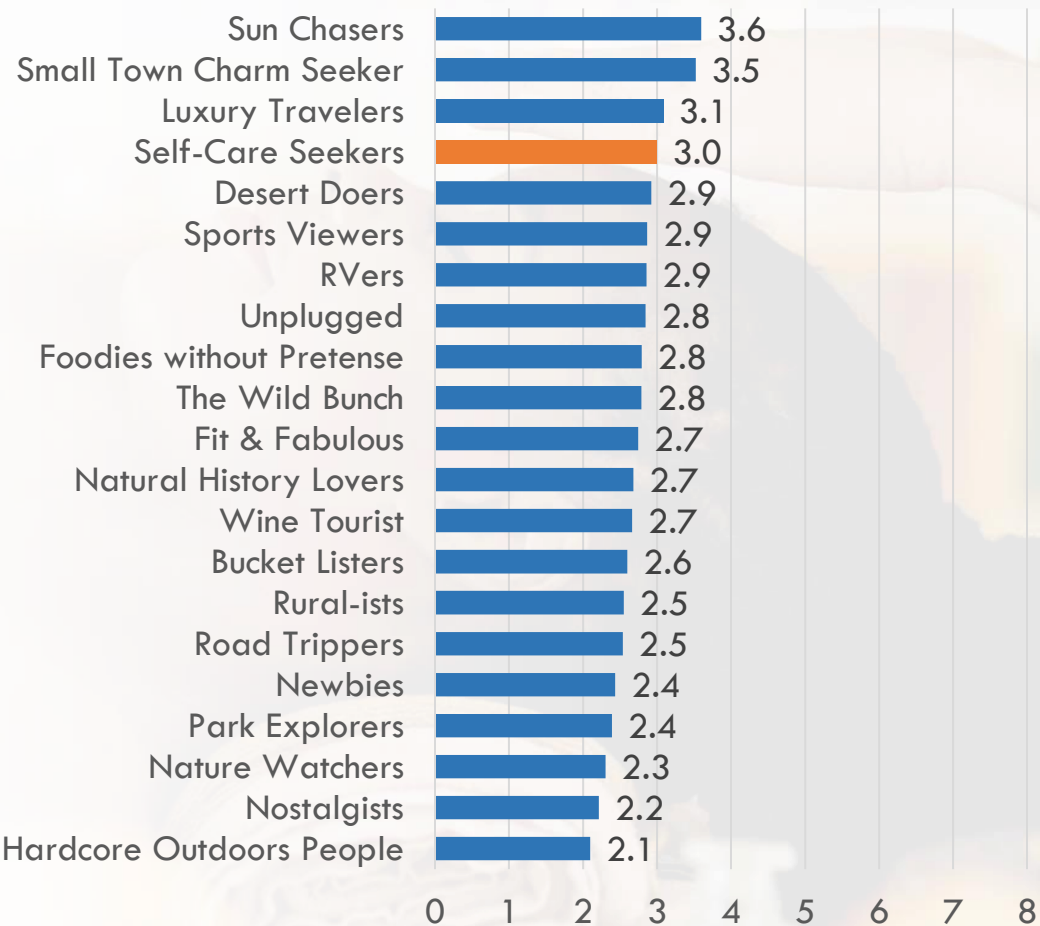
Number of Leisure Trips in the Past 3 Years

(of at least 100 miles round-trip from home)



Question: In the PAST THREE (3) YEARS, how many leisure trips (of at least 100 miles round-trip from your home) have you made?

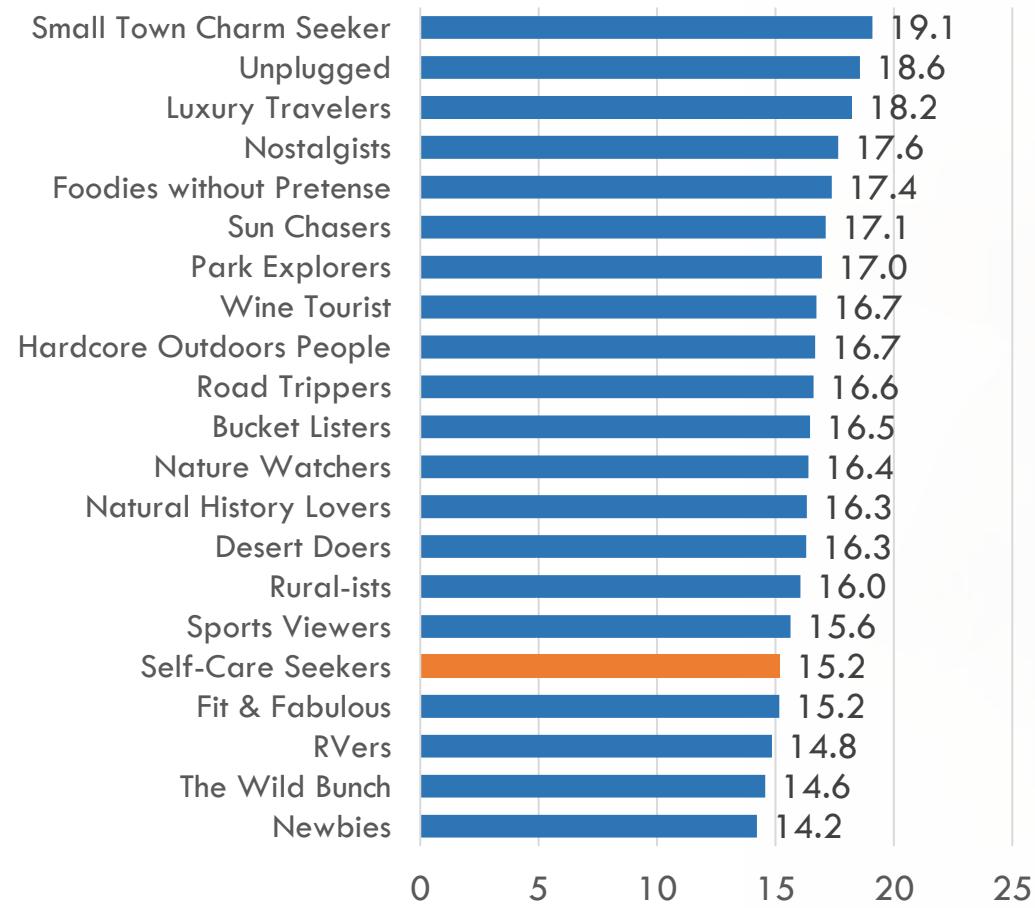
Number of Leisure Trips to Sunny, Warm Weather Destinations in the Past 2 Years



Question: In the PAST TWO (2) YEARS, how many leisure trips did you take primarily to visit a sunny, warm weather destination?

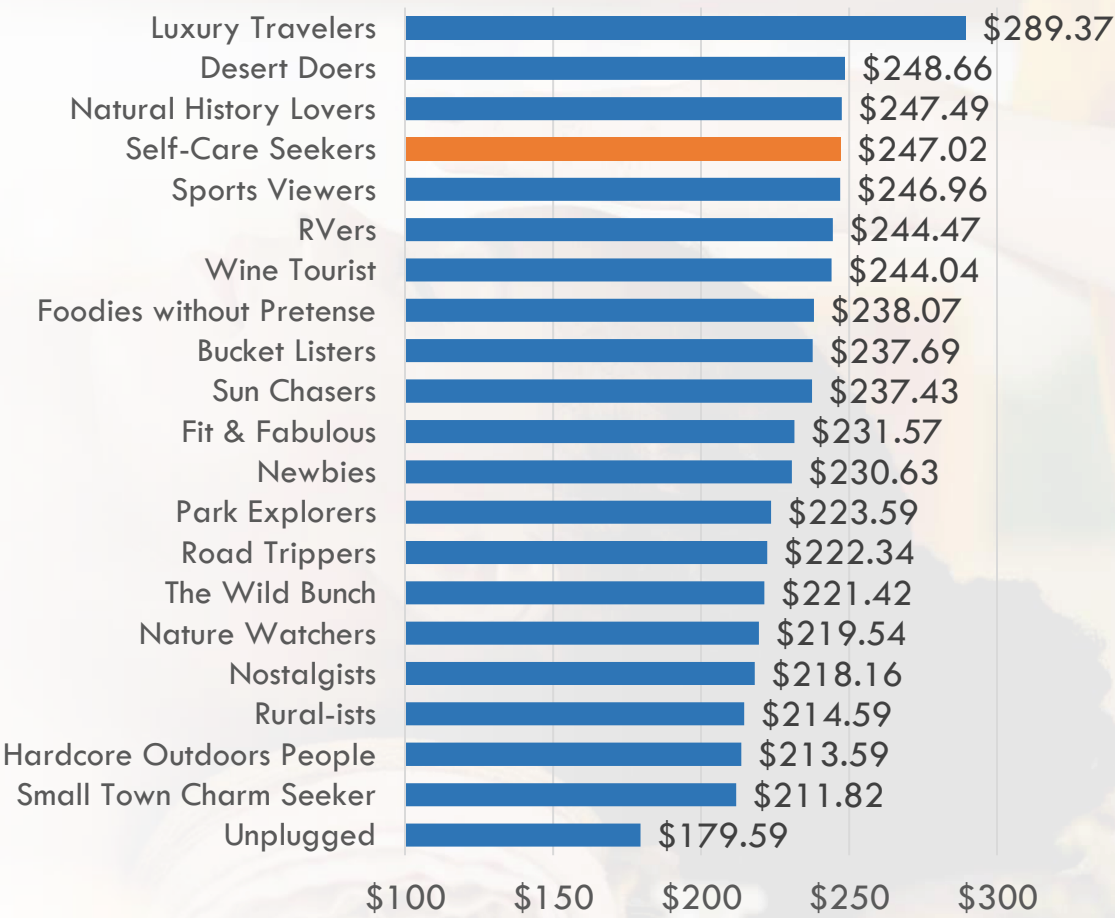
SELF-CARE SEEKERS

Number of Days Available for Leisure Travel
In the Next 12 Months



Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

Expected Daily Spend Per Person, Per Day



Question: EXCLUDING AIRFARE, on a typical week-long domestic leisure trip, how much would you expect to spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.)? How many people would this spending usually cover?

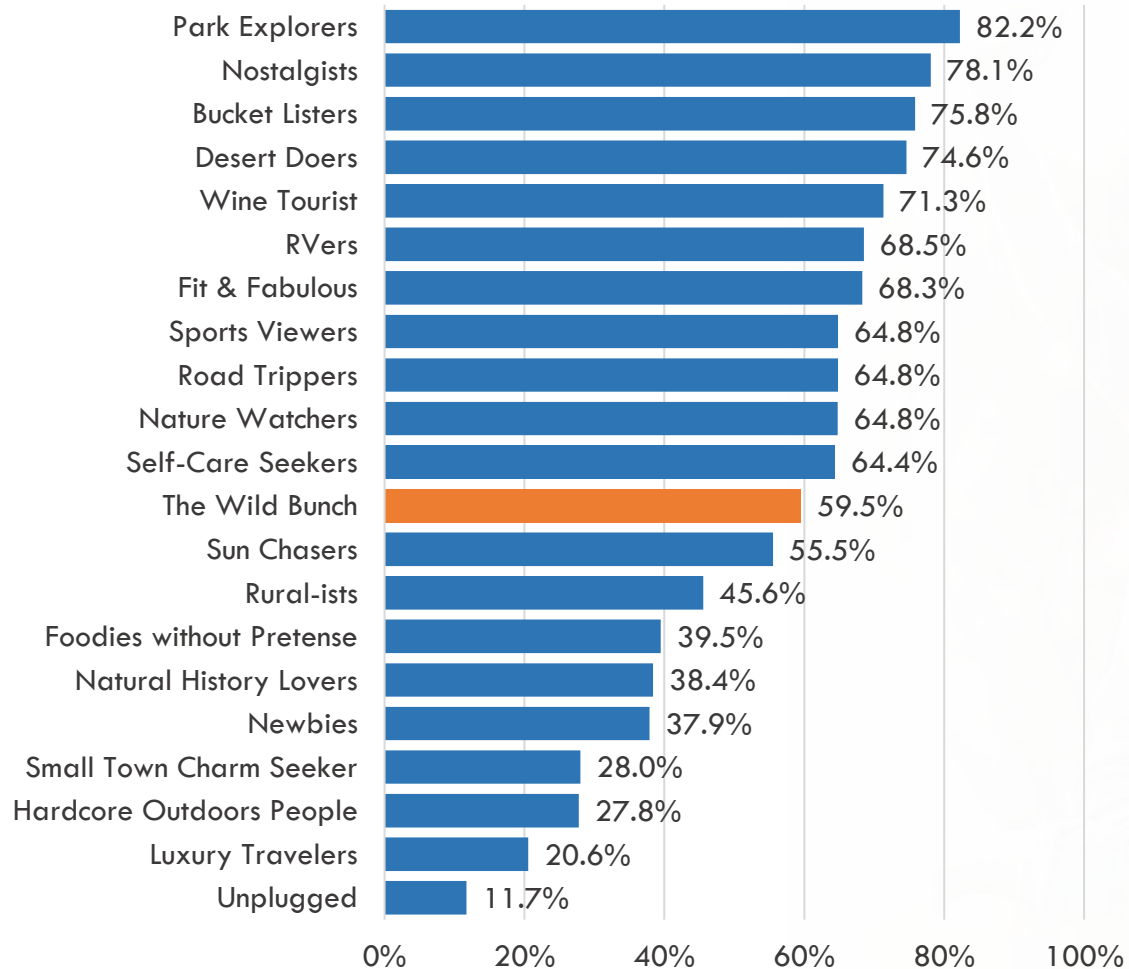
THE WILD BUNCH

Families that love spending time together outdoors.

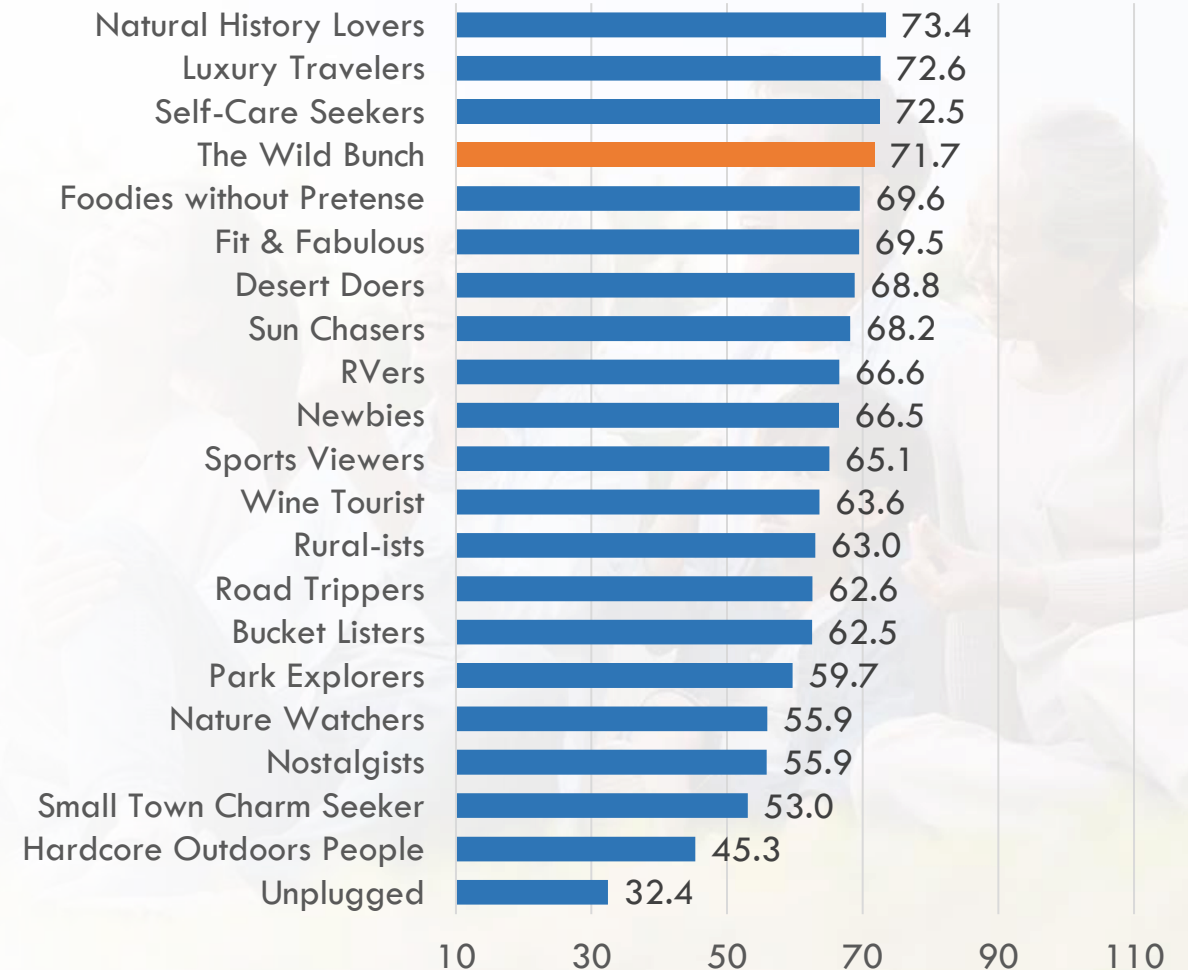
- **59.5%** are high potential for Arizona (80 or higher index score)
- Average Arizona Index Score of **71.7**
- A grade of “**B**” for sustainability
- **59.8%** “generally agree” or “strongly agree” an Arizona vacation is a perfect fit for them
- Have taken **4.2** leisure trips (of at least 100 miles round-trip from their home) in the past 3 years
- Have taken **2.8** leisure trips primarily to visit a sunny, warm weather destination in the past 2 years
- Have **14.6** days available for leisure travel in the next 12 months
- Expects to spend **\$221.42** per person, per day for a domestic leisure trip

THE WILD BUNCH

Proportion Who are High Potential for Arizona
(80 or higher index score)

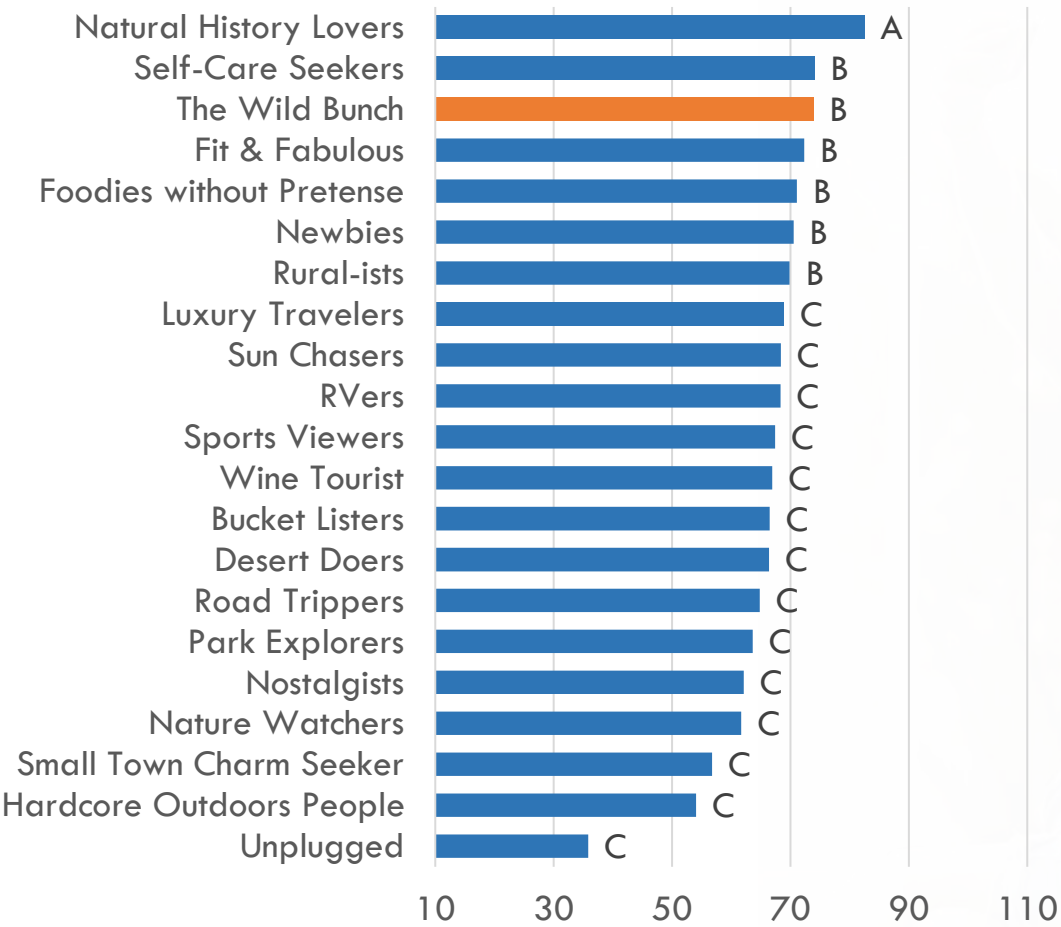


Arizona Index Score



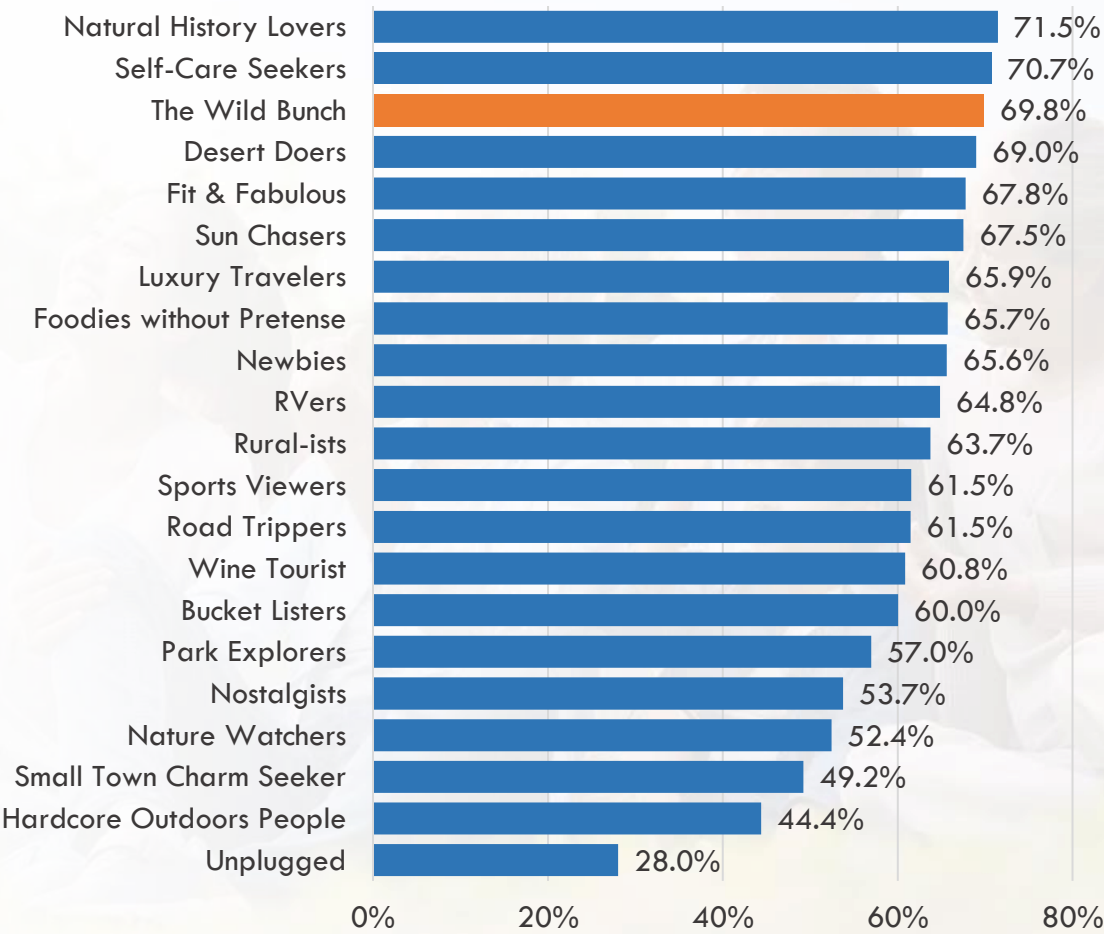
THE WILD BUNCH

Sustainability Grade



“An Arizona Vacation is a Perfect Fit for Me”

Top 2 Box Score—% who “Generally Agree” or “Strongly Agree”

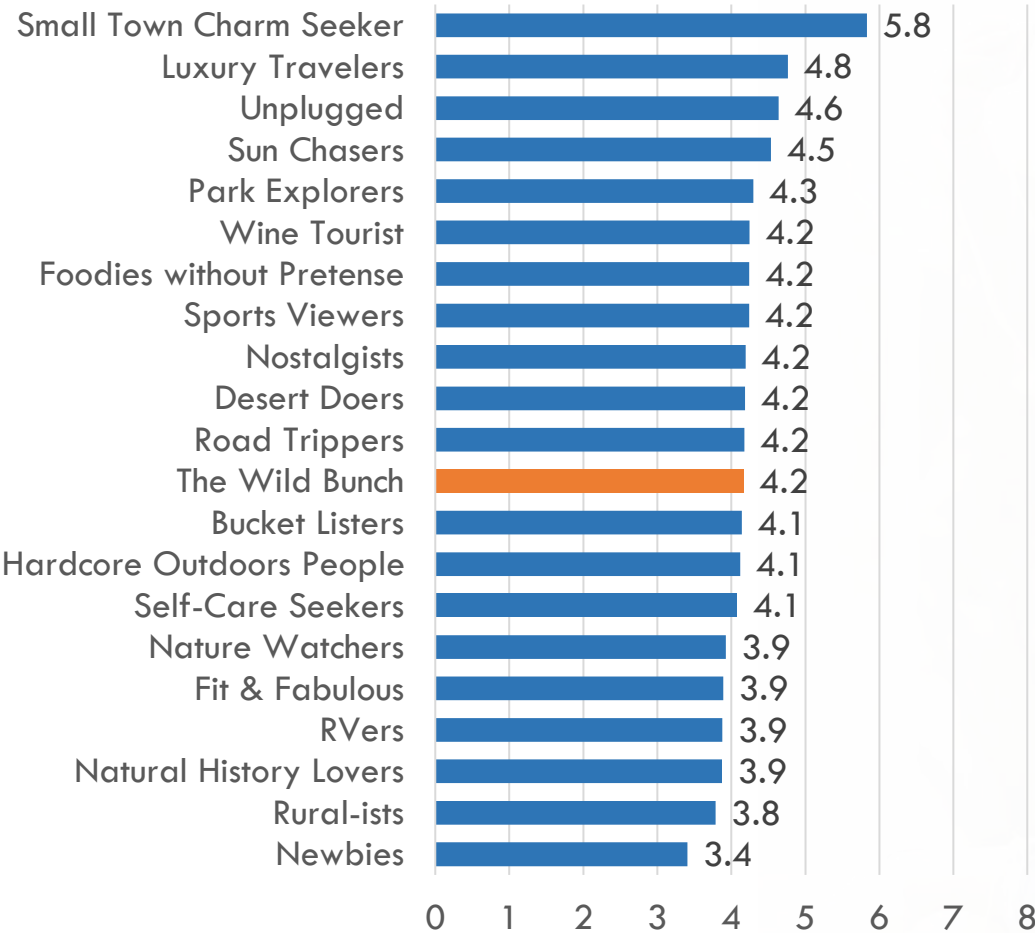


Question: How much do you agree with the following statement? An Arizona vacation is a perfect fit for travelers like me.

THE WILD BUNCH

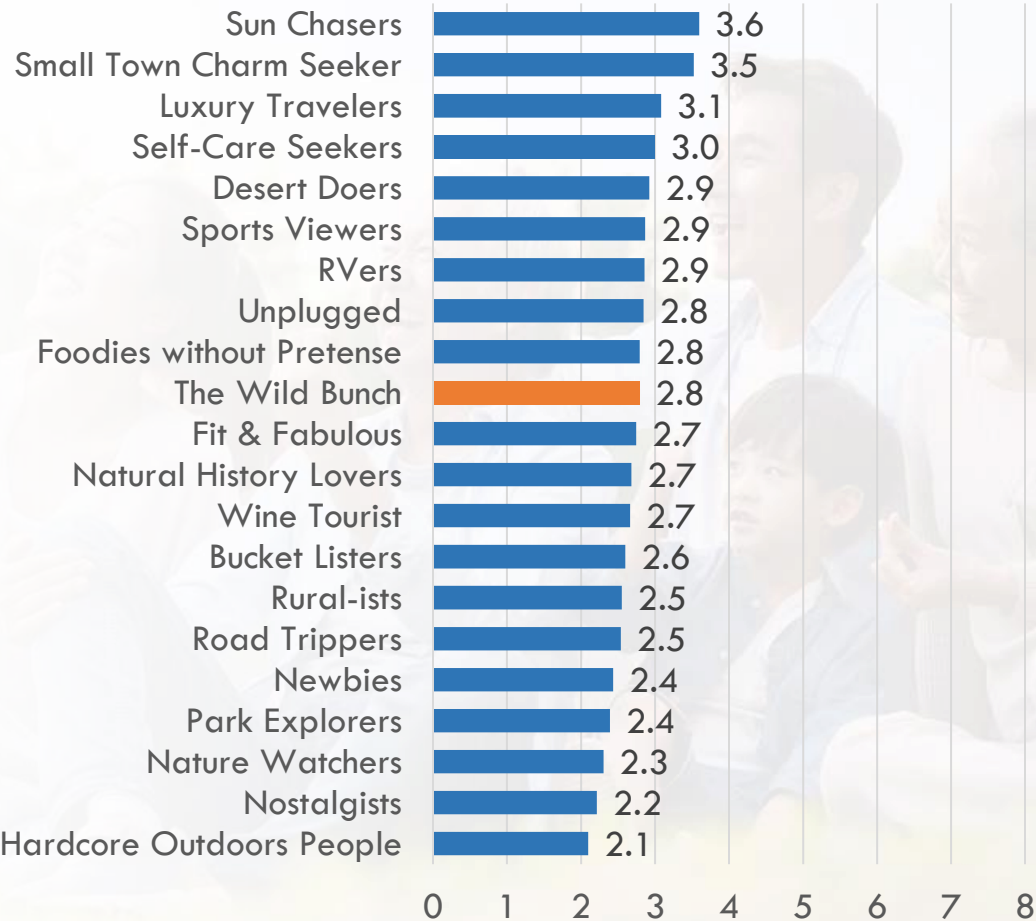
Number of Leisure Trips in the Past 3 Years

(of at least 100 miles round-trip from home)



Question: In the PAST THREE (3) YEARS, how many leisure trips (of at least 100 miles round-trip from your home) have you made?

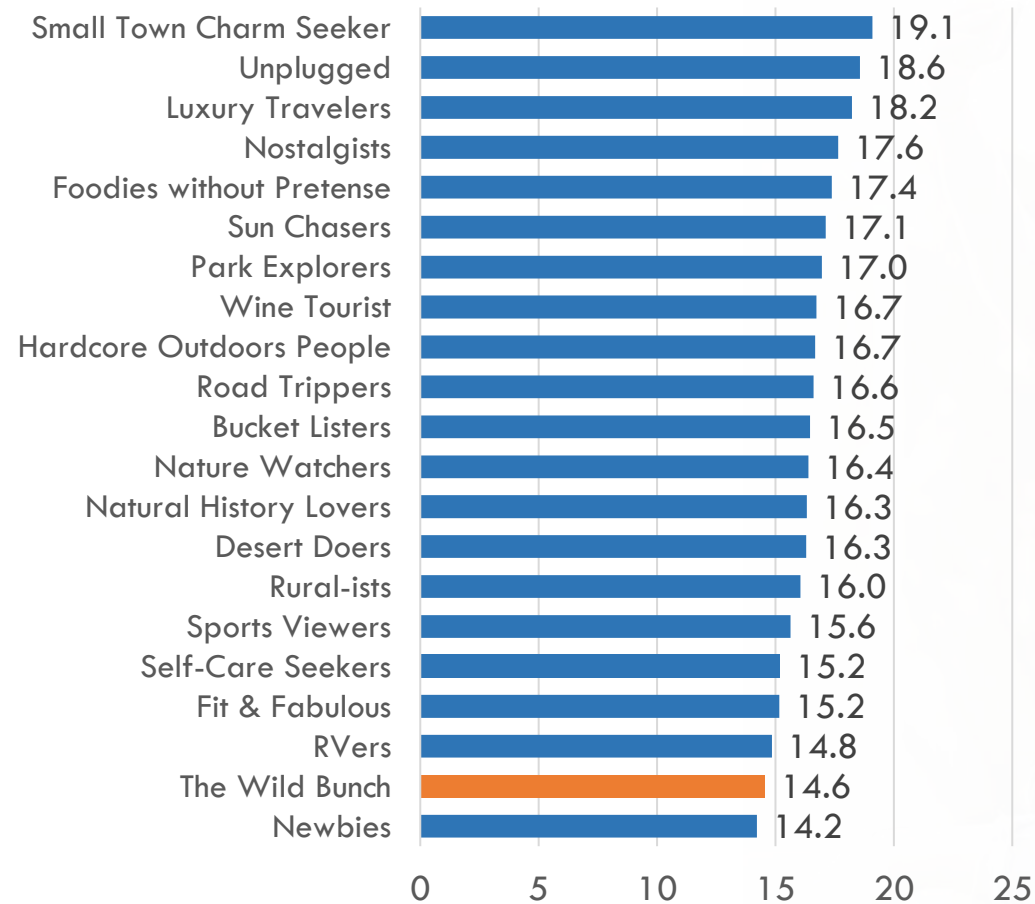
Number of Leisure Trips to Sunny, Warm Weather Destinations in the Past 2 Years



Question: In the PAST TWO (2) YEARS, how many leisure trips did you take primarily to visit a sunny, warm weather destination?

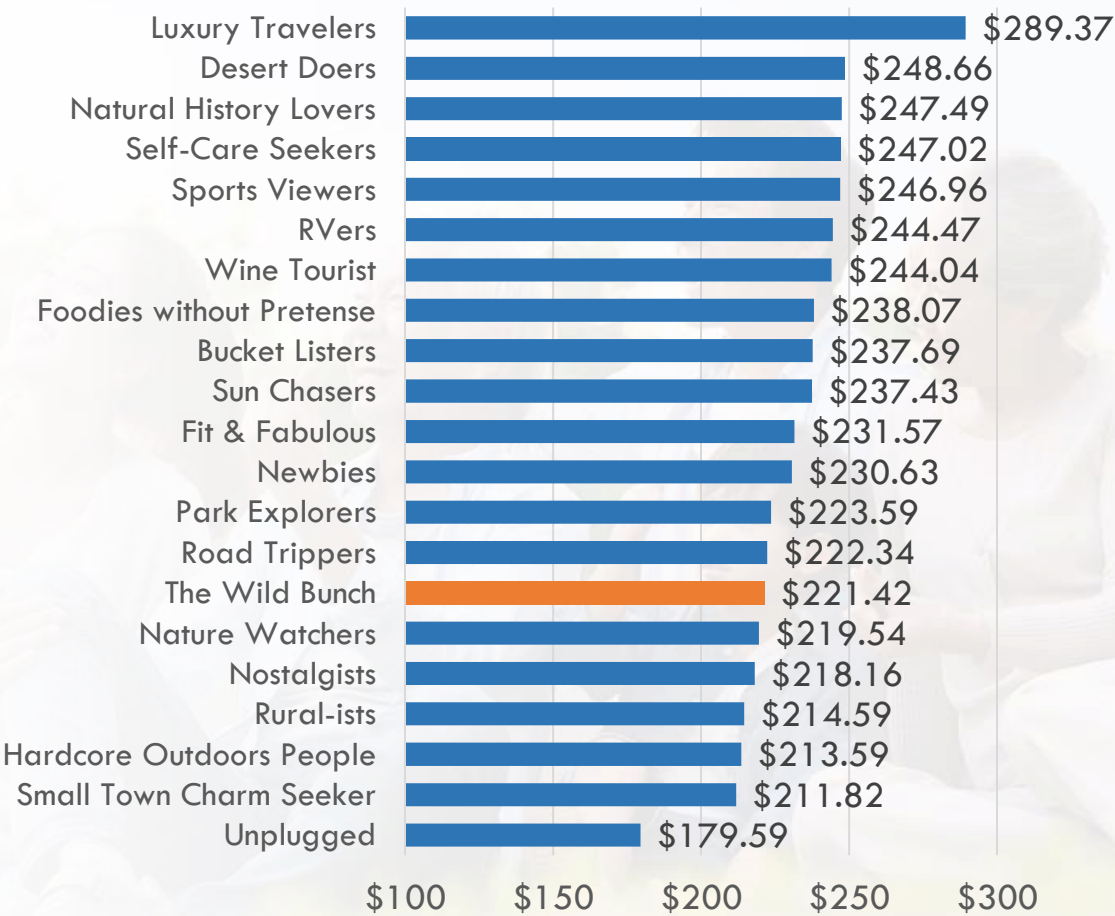
THE WILD BUNCH

Number of Days Available for Leisure Travel
In the Next 12 Months



Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

Expected Daily Spend Per Person, Per Day



Question: EXCLUDING AIRFARE, on a typical week-long domestic leisure trip, how much would you expect to spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.)? How many people would this spending usually cover?

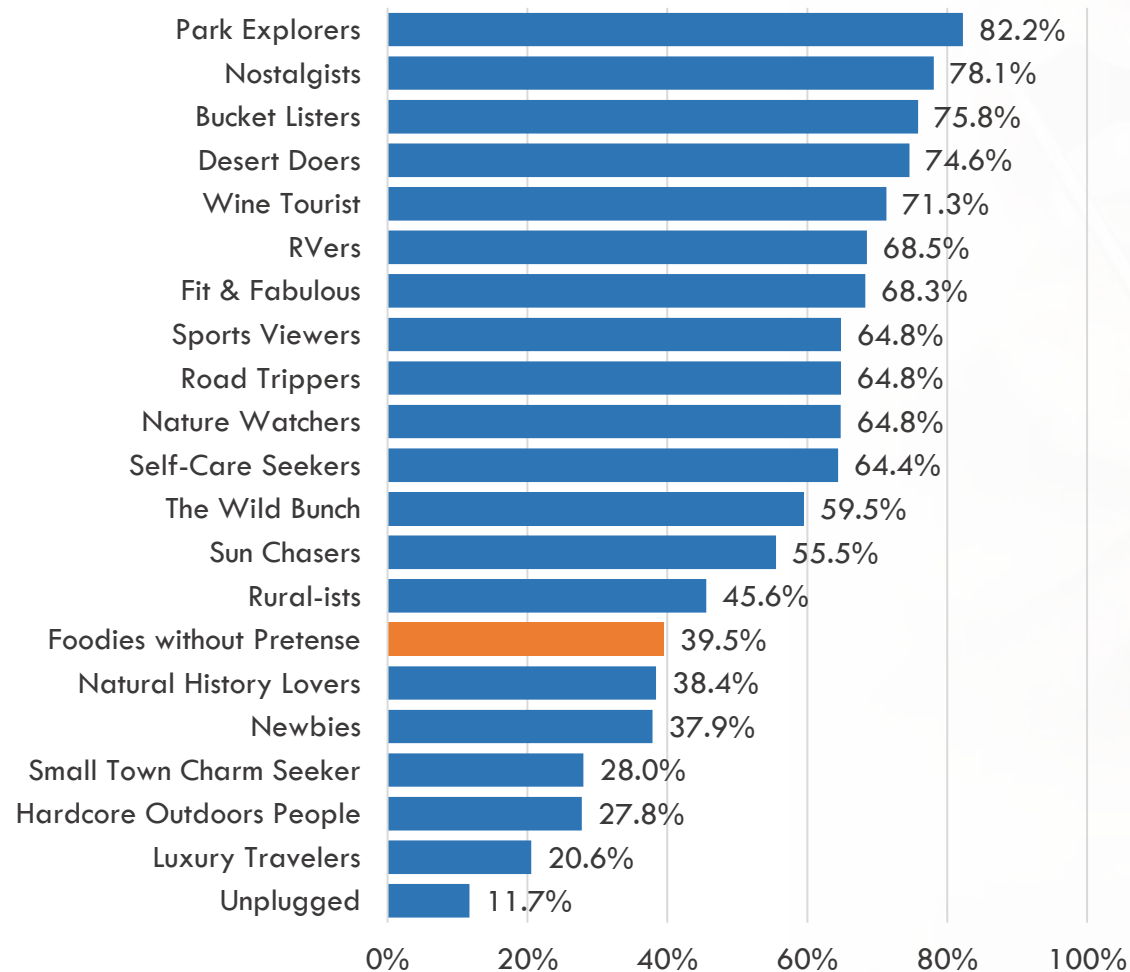
FOODIES WITHOUT PRETENSE

Authentic, “down home” regional cuisines, and experiences like farm-to-table and street food, drive these travelers’ choices

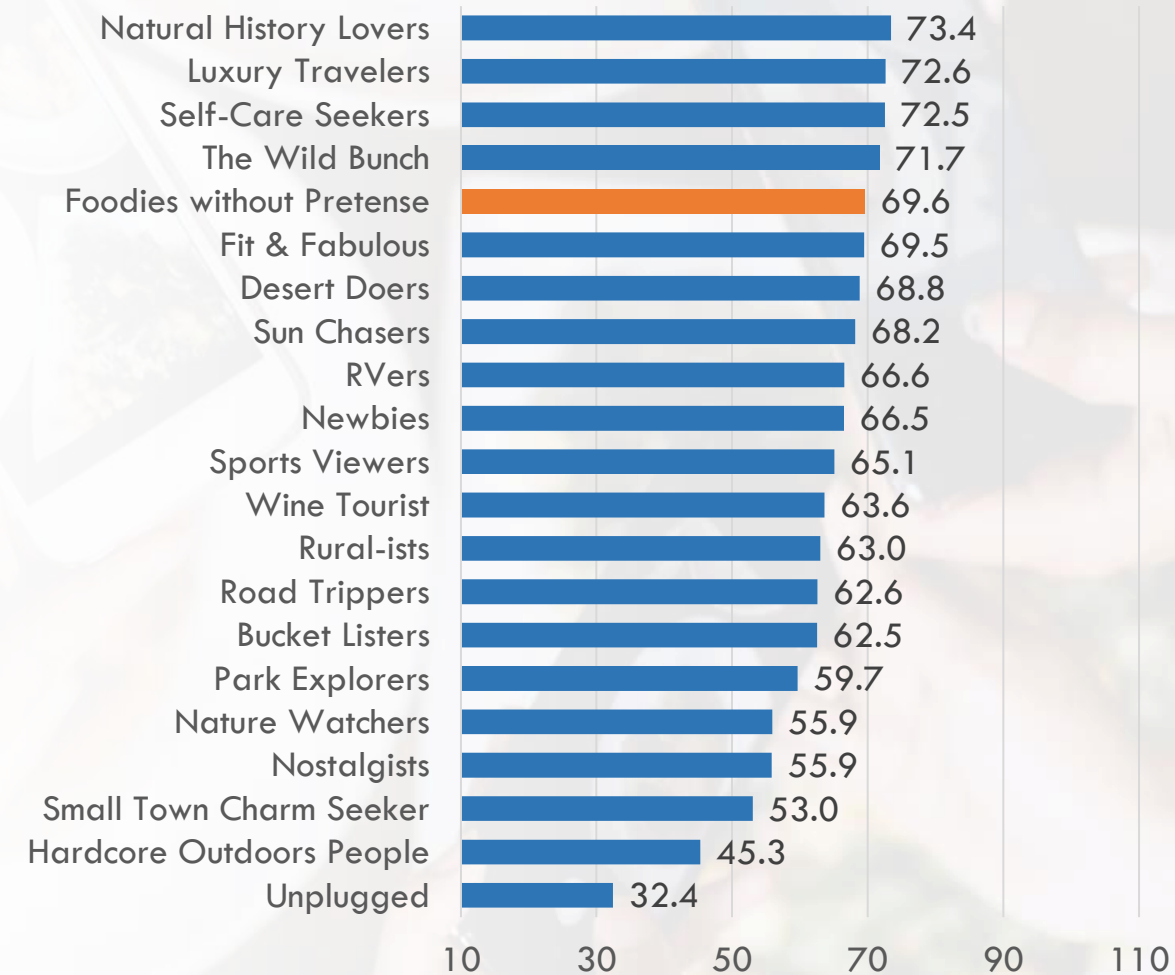
- **39.5%** are high potential for Arizona (80 or higher index score)
- Average Arizona Index Score of **69.6**
- A grade of “**B**” for sustainability
- **65.7%** “generally agree” or “strongly agree” an Arizona vacation is a perfect fit for them
- Have taken **4.2** leisure trips (of at least 100 miles round-trip from their home) in the past 3 years
- Have taken **2.8** leisure trips primarily to visit a sunny, warm weather destination in the past 2 years
- Have **17.4** days available for leisure travel in the next 12 months
- Expects to spend **\$238.07** per person, per day for a domestic leisure trip

FOODIES WITHOUT PRETENSE

Proportion Who are High Potential for Arizona
(80 or higher index score)

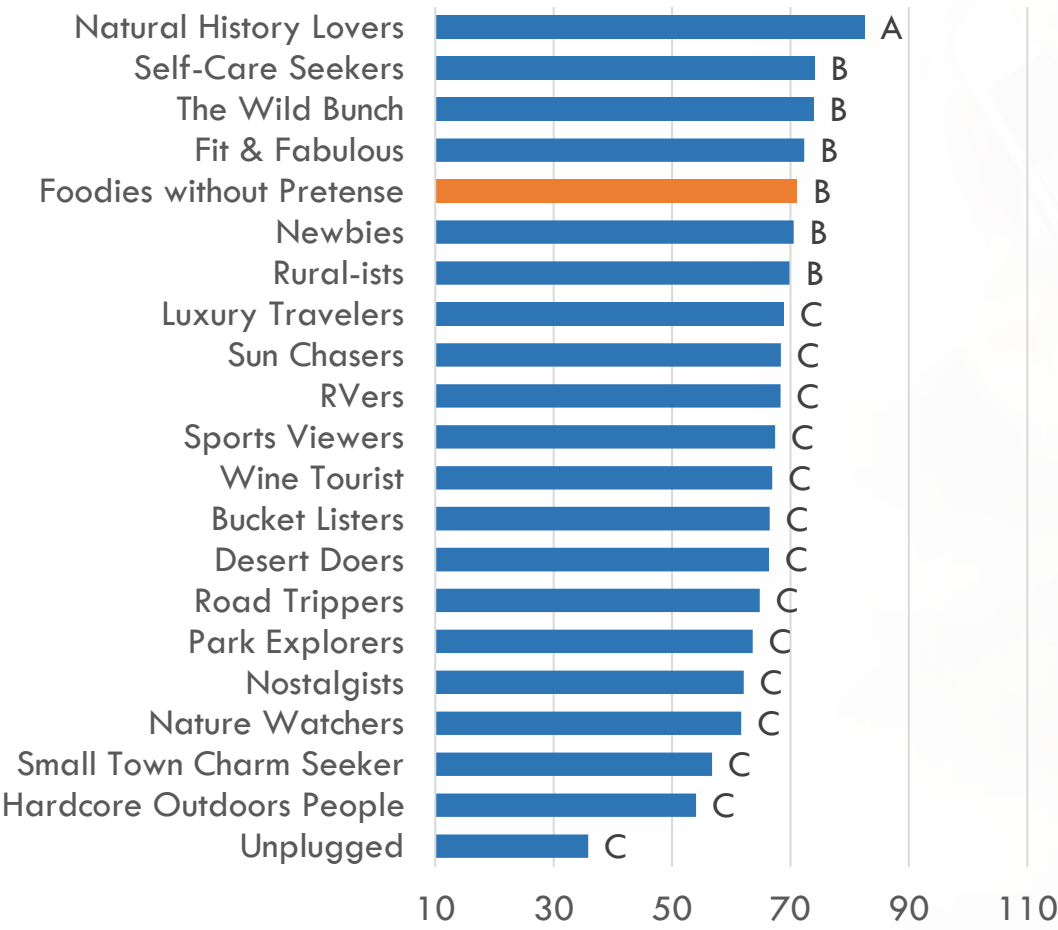


Arizona Index Score



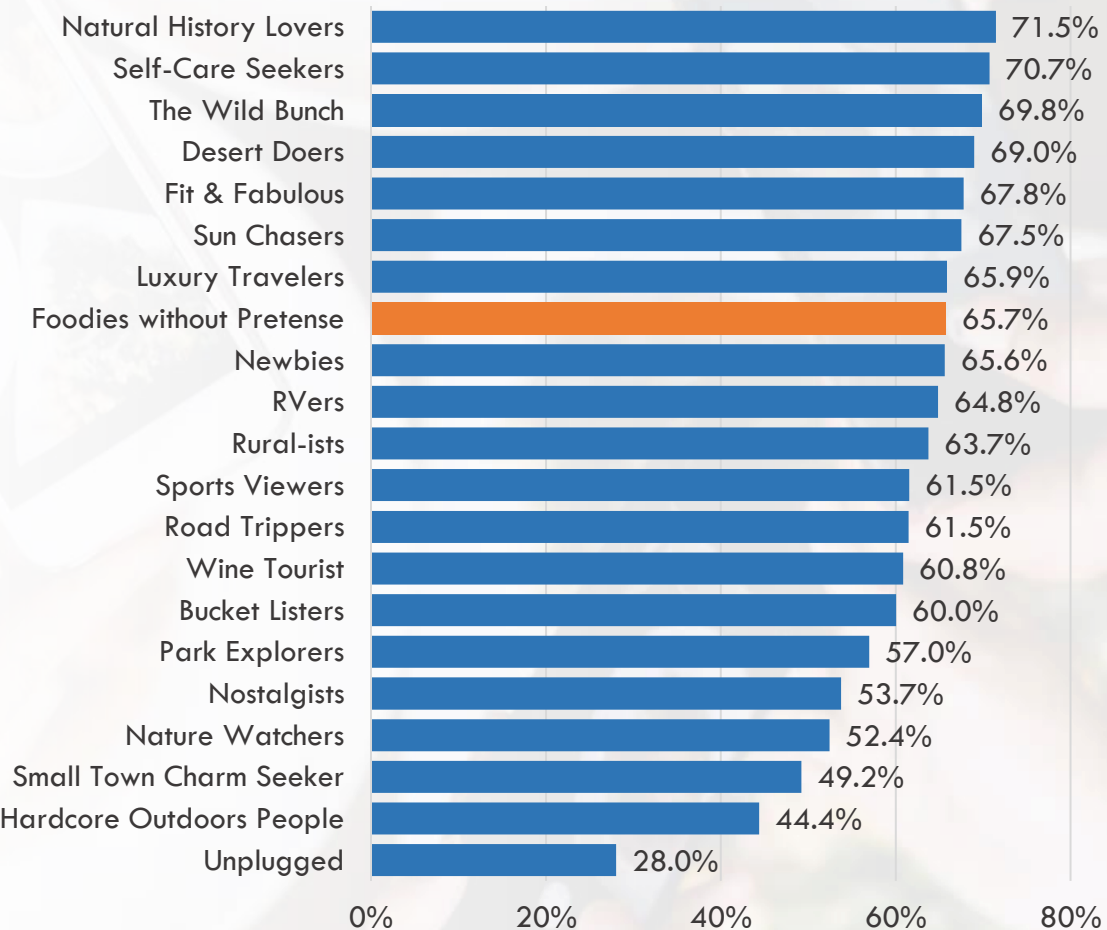
FOODIES WITHOUT PRETENSE

Sustainability Grade



“An Arizona Vacation is a Perfect Fit for Me”

Top 2 Box Score—% who “Generally Agree” or “Strongly Agree”

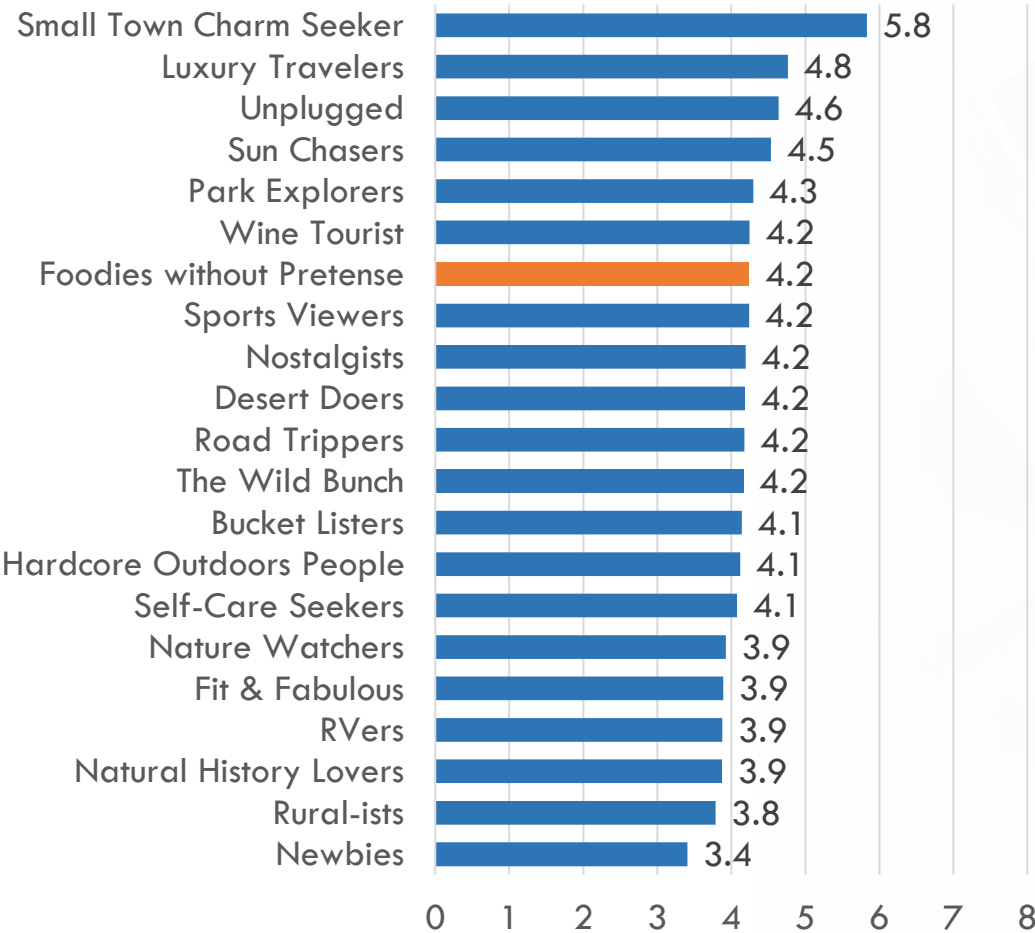


Question: How much do you agree with the following statement? An Arizona vacation is a perfect fit for travelers like me.

FOODIES WITHOUT PRETENSE

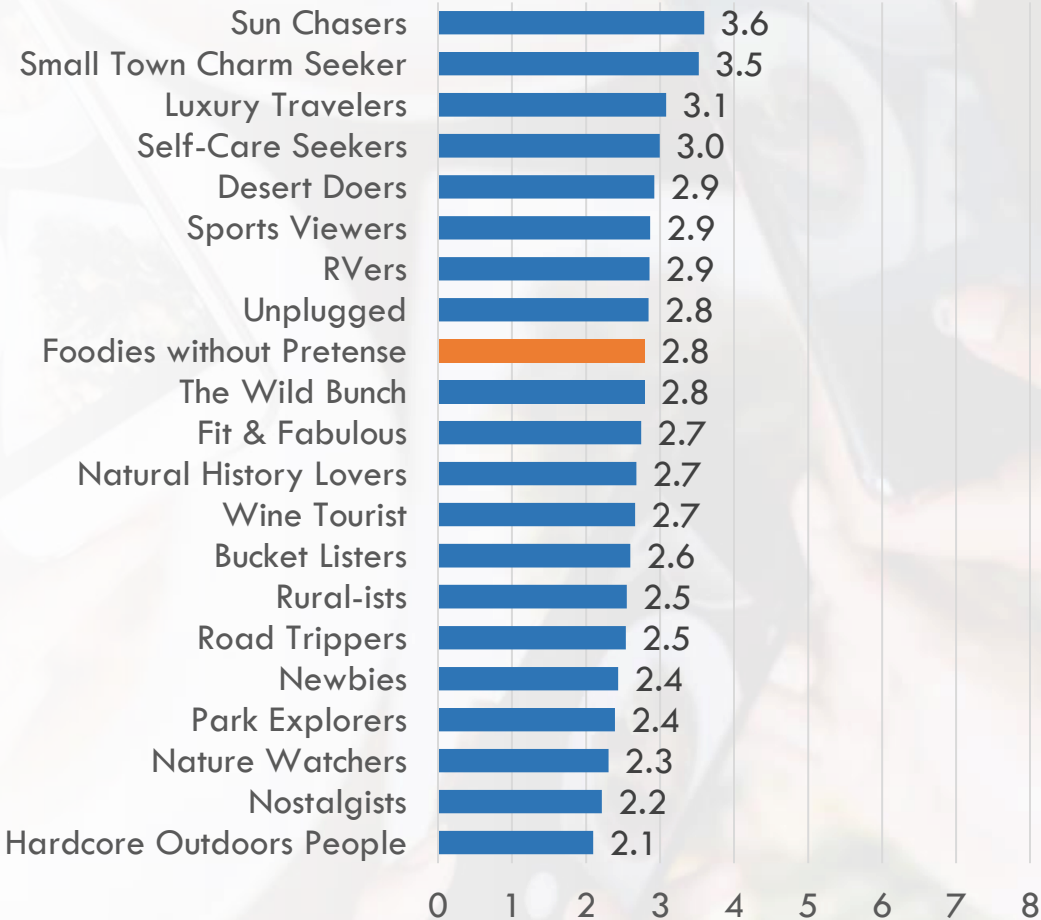
Number of Leisure Trips in the Past 3 Years

(of at least 100 miles round-trip from home)



Question: In the PAST THREE (3) YEARS, how many leisure trips (of at least 100 miles round-trip from your home) have you made?

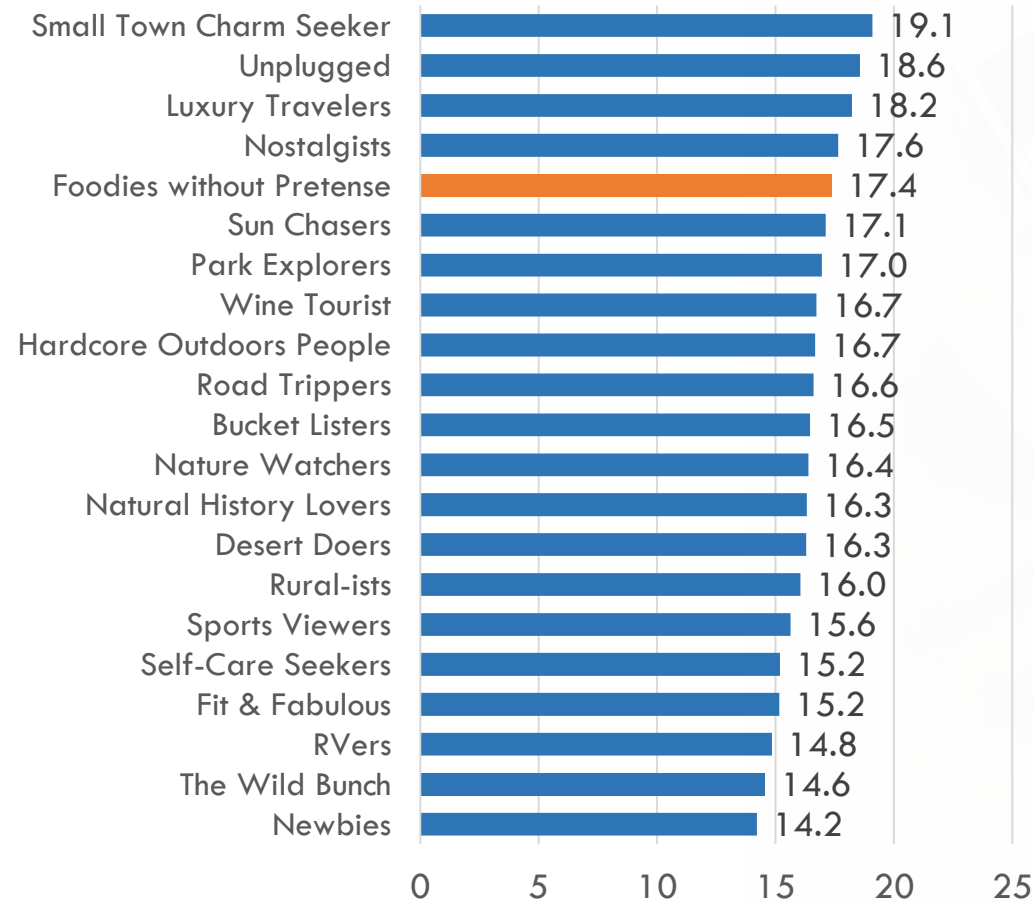
Number of Leisure Trips to Sunny, Warm Weather Destinations in the Past 2 Years



Question: In the PAST TWO (2) YEARS, how many leisure trips did you take primarily to visit a sunny, warm weather destination?

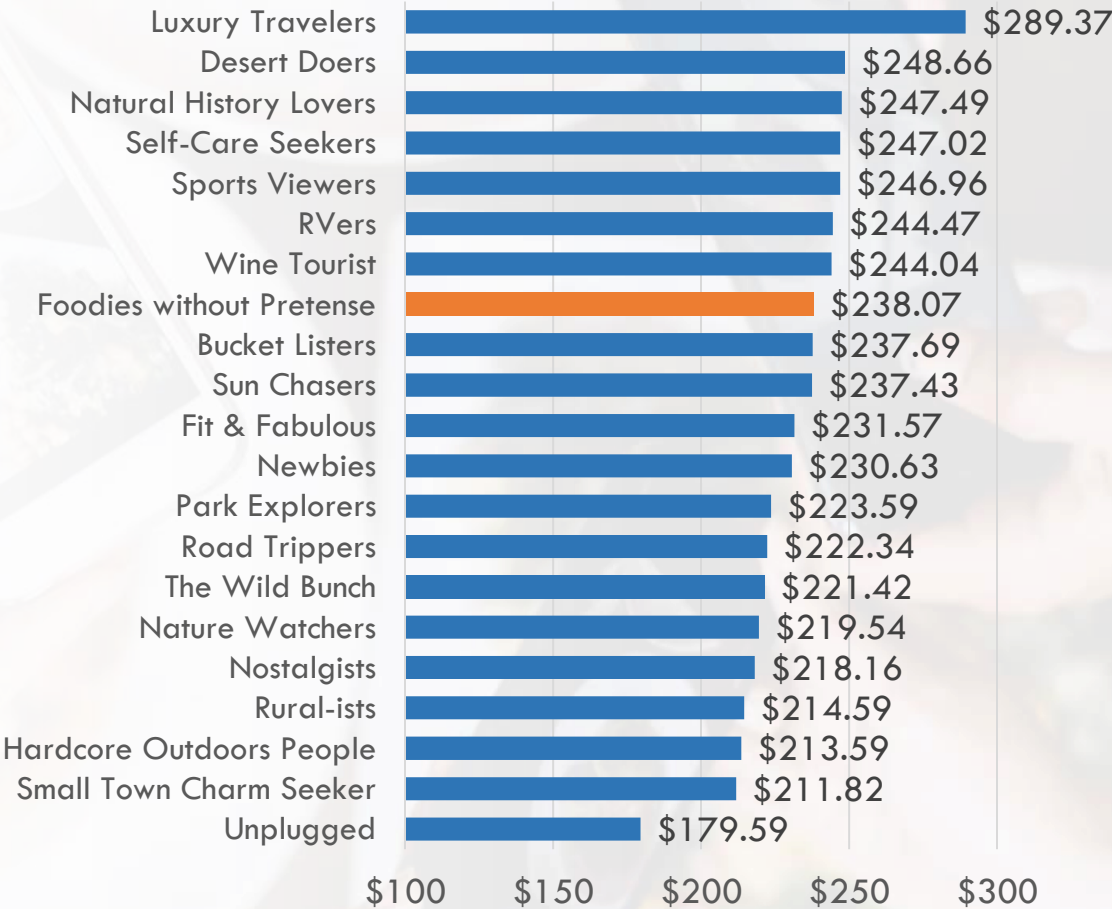
FOODIES WITHOUT PRETENSE

Number of Days Available for Leisure Travel
In the Next 12 Months



Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

Expected Daily Spend Per Person, Per Day



Question: EXCLUDING AIRFARE, on a typical week-long domestic leisure trip, how much would you expect to spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.)? How many people would this spending usually cover?

PRIORITIZING ARIZONA'S HIGH VALUE PERSONAS

PRIORITIZING HIGH VALUE PERSONAS

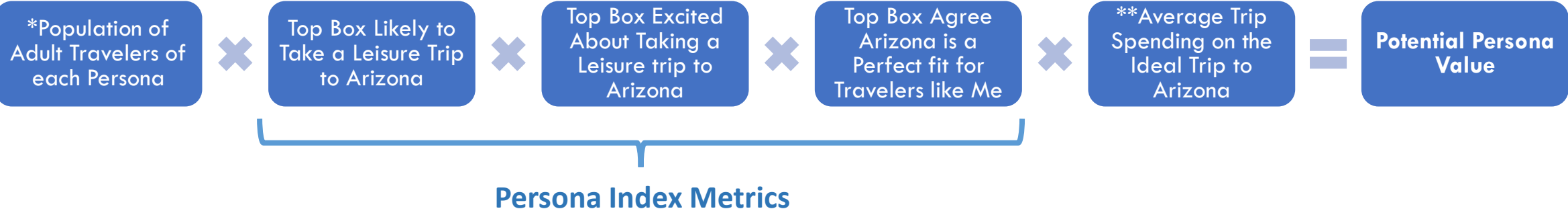
Metrics used in Destination Analysts' index model are also used in the process of prioritizing the five recommended high value personas. The prioritization of Arizona's five high value personas takes into account:

- The incidence of each persona in the U.S. population
- The likelihood to take a leisure trip anywhere in the State of Arizona in the next 3 years (which is used in Destination Analysts' index model)
- The level of excitement about taking a leisure trip to the State of Arizona (which is used in Destination Analysts' index model)
- The level of agreement with the statement *"An Arizona vacation is a perfect fit for travelers like me"* (which is used in Destination Analysts' index model)
- Average trip spending on the ideal trip to Arizona



PRIORITIZING HIGH VALUE PERSONAS

The table on the following page presents economic value estimates for the recommended high value personas.
The basic steps used in the calculation of these value estimates is shown below.



** Note that the population of adult travelers for each persona is calculated by multiplying the adjusted number of traveling adult households in the U.S. by the estimated incidence of each persona in the population.*

*** Also note that the Average trip spending on the ideal trip to Arizona is calculated by dividing the reported average daily party spend by the number of people covered by that spending and multiplying by the length of trip.*

PRIORITIZING HIGH VALUE PERSONAS—ECONOMIC VALUE ESTIMATES

The following table presents the estimated economic value for each recommended persona.

Persona	Population of Adult Travelers of each Persona	Top Box Likely to Take a Leisure Trip to Arizona	Top Box Excited About Taking a Leisure trip to Arizona	Top Box Agree Arizona is a Perfect fit for Travelers like Me	Average Trip Spending on the Ideal Trip to Arizona	Potential Traveler Persona Value
Natural History Lovers	34,373,715	55.6%	48.1%	50.5%	\$1,206.91	\$5,602,896,546
Self-Care Seekers	64,703,447	46.1%	33.9%	40.1%	\$1,110.83	\$4,504,224,351
Wild Bunch	62,110,700	42.1%	33.5%	38.4%	\$955.88	\$3,215,347,571
Foodies without Pretense	37,515,999	48.1%	41.5%	42.8%	\$1,060.89	\$3,400,351,503
Luxury Travelers	20,287,266	47.7%	40.4%	45.5%	\$1,431.56	\$2,546,503,160

Similar to the Persona Index Score ranking, Natural History Lovers are the persona that represents the highest potential value to generate economic impact in Arizona due to their strong alignment with the Arizona destination brand. Self-Care Seekers and Wild Bunch account for larger proportions of the American traveling population and thus should be easier to reach with marketing. Although a smaller portion of the population, Luxury Travelers expect to spend the most on a trip to Arizona due not only to a higher expected daily spend but also because these travelers expect to stay longer on their trip.

SUMMARY PROFILES OF ARIZONA'S HIGH VALUE TRAVELER PERSONAS

A group of five diverse young adults (three women and two men) are smiling and posing together outdoors. The image is overlaid with a semi-transparent dark grey filter. The text "PROFILE SUMMARIES BY PERSONA" is centered in white, bold, uppercase letters. A vertical teal line is positioned to the left of the text.

PROFILE SUMMARIES BY PERSONA

LEISURE TRAVELERS

3,004 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all survey respondents.

KEY CHARACTERISTICS

Characteristics (Total Leisure Travelers):

- With an average age of 49.9 years, these leisure travelers are quite affluent (\$129,234 average household income) and typically married/partnered (74.0%). Half (52.1%) have children under 18. They travel somewhat frequently (2.9 leisure trips in past year; 4.5 trips planned next two years).
- Their top three favorite vacation activities include dining (50.1%), relaxing (42.9%), and being in nature (31.6%). They strongly prefer outdoor destinations (55.6%) to urban centers (28.4%).

Performance of Arizona:

- Three-quarters (73.6%) feel familiar with Arizona and two-in-five (41.1%) have visited in the past five years. Already positioned well in the traveler mindset, California (26.5%) and Arizona (25.4%) top the list of desired Southwest places to visit.
- Travelers praise Arizona's scenic beauty (83.7%), new things to see (79.8%), ability to "get away from it all" (78.3%), adventure opportunities (77.6%), and iconic/famous attractions (73.1%).
- Comparing the importance of various features to Arizona's ratings, there are two key areas to strengthen Arizona's message: affordability (a 13.0%-pt. gap) and welcoming atmosphere (a 14.0% gap, and also is the third-most important attribute).
- Arizona's appealing statements and believability match, so promoting it as an extremely beautiful state (83.1% appealing) with an interesting culture/history (80.5%) works. Here, again, affordability has room to improve (77.1% appealing; 71.2% believable).

On an ideal Arizona trip:

- Most expect to come with their spouse/significant other (72.5%); many would include children (28.2% younger; 17.6% older children).
- These travelers would be lucrative tourists (\$491 per day), staying an average of 5.3 days.
- National Parks entice the largest share of potential tourists (44.5%) while cuisine (31.8%) and history/archaeology (27.5%) would draw more than one-in-four.

Arizona – Deterrents and Counter-Messaging:

- The two top deterrents for an Arizona trip are that a trip is time-consuming (27.4%) or too hot/weather (23.0%). One of the leading positioning statements selected by these travelers would mitigate the weather component: "It's 80 Degrees Somewhere" (27.8%), but "Together is Better Here" (27.6%) ties it in appeal.

Reaching Potential Visitors – Where They Look for Ideas and Inspiration:

- Digitally, online searches top the list (39.1%), followed by friends/family via social media (34.5%). Non-digitally – word-of-mouth clearly reigns: friends/family through direct contact (41.0%). The best marketing tool for that (word-of-mouth) is to make sure everyone goes home satisfied and talks about it.

LEISURE TRAVELERS *Who they are*



Gender

Female: 49.9%
Male: 49.1%
Non-binary/Transgender: 1.0%



Marital Status

Married/partnered: 74.0%
Single: 18.9%
Children under 18: 52.1%



Average Age: 46.3

Millennial or younger: 44.7%
Gen X: 27.1%
Boomer or older: 28.2%



Ethnicity

Caucasian: 76.7%
Non-Caucasian: 23.3%



Household Income

\$129,234



Physical, Visual, Auditory or Cognitive Disability

Disability: 17.0%



Top MSAs

Los Angeles-Long Beach, CA	5.5%	San Francisco-Oakland, CA	2.8%
New York, NY-NJ	4.8%	Philadelphia, PA	2.4%
Chicago, IL	4.0%	Phoenix, Mesa AZ	2.0%

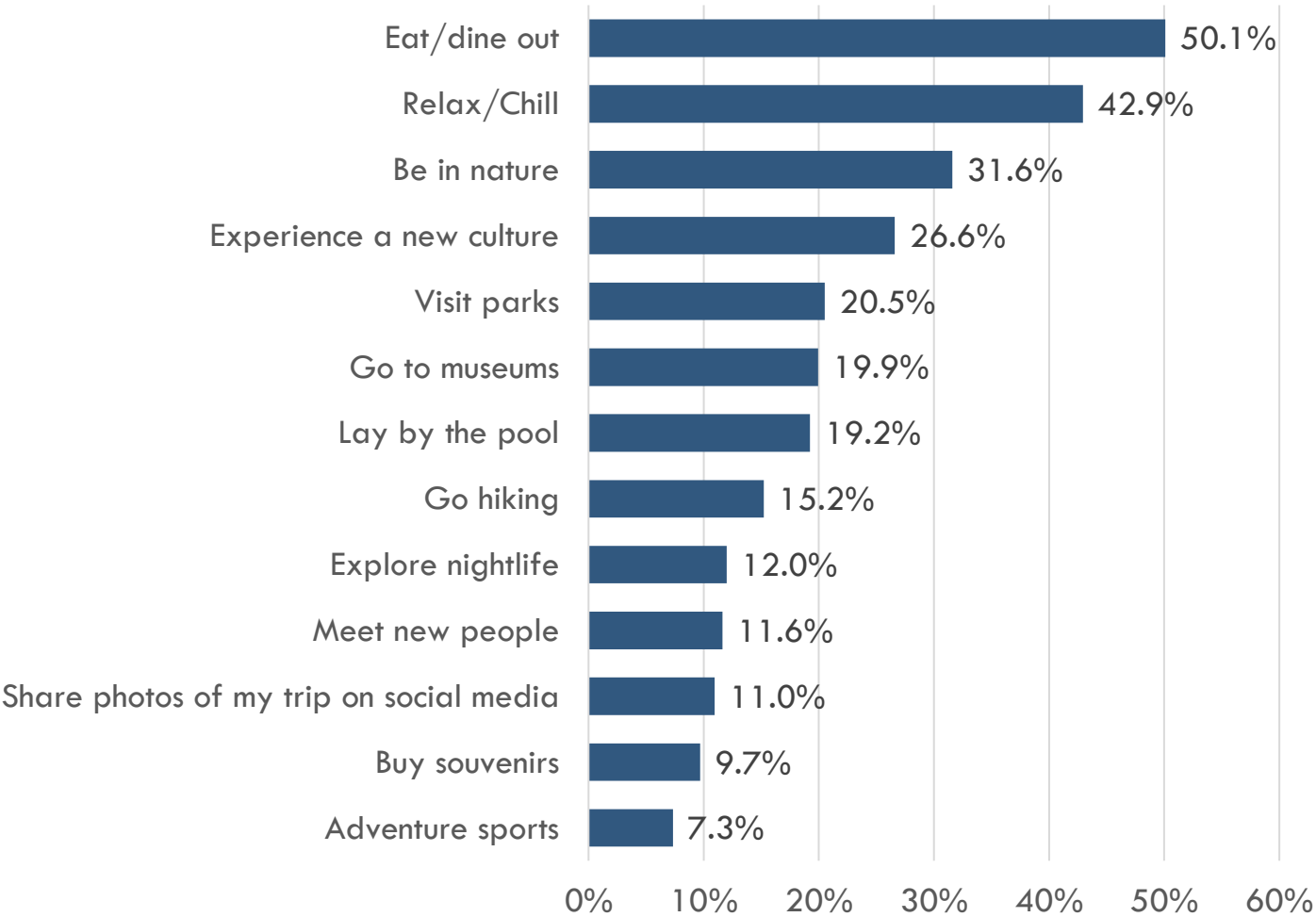


**Average number of
leisure trips in
the *past twelve months***

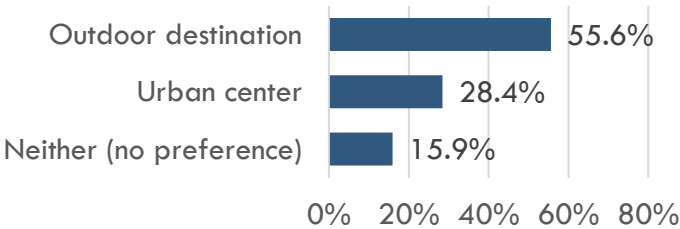


**Average number of
expected leisure trips
in the *next two years***

Favorite Things to Do on Vacation



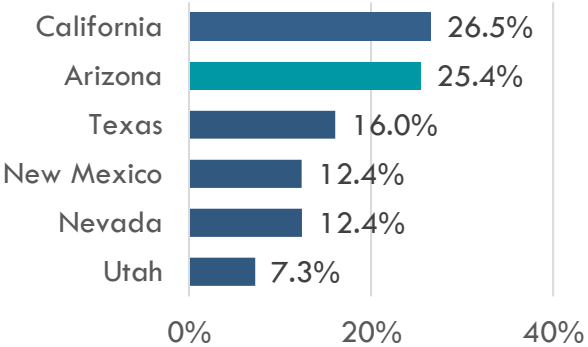
Preference for Outdoor Destination vs. Urban Center



Average Maximum Spend on Hotel Room

\$458.51

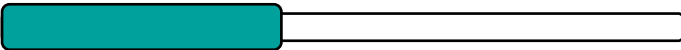
Desired Southwest Destinations to Visit



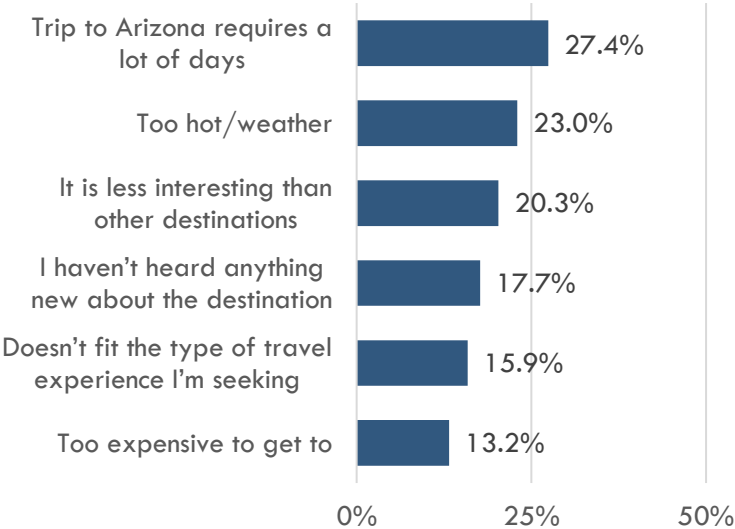
Familiarity with Arizona as a Place to Visit
(Top 3 Box Score—% selecting “slightly familiar,”
“familiar,” or “extremely familiar”) **73.6%**



Visited Arizona in the Past 5 Years **41.1%**

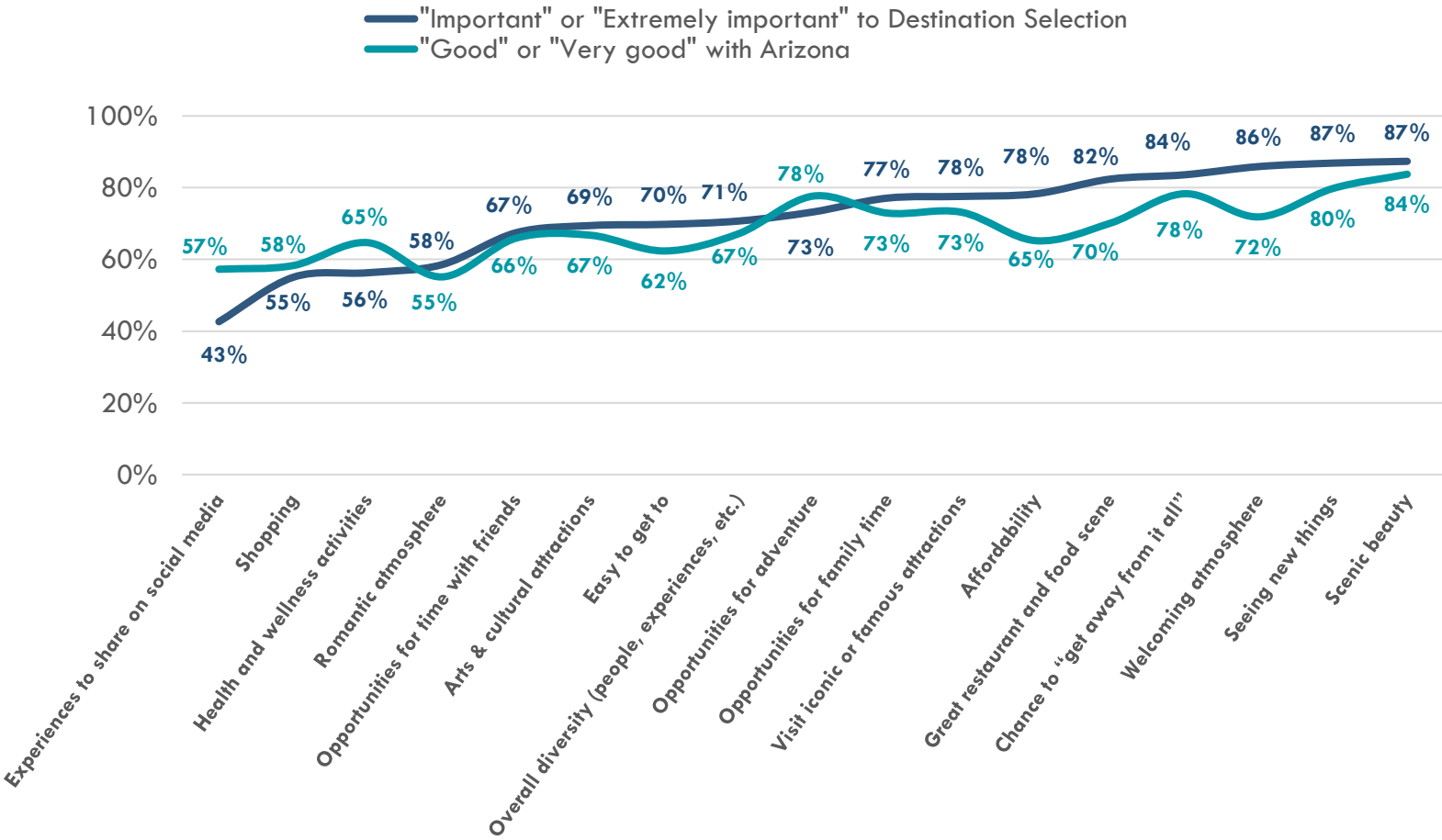


**Top Reasons for
Not Visiting Arizona in the Past 5 Years**
(% of non-recent visitors)



**Important Attributes for Destination Selection vs.
Rating of Arizona's Attributes**

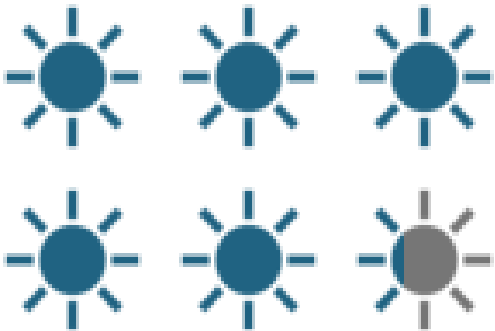
(Top 2 Box Score of those who rated “Important” or “Extremely important” vs.
Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)



Place of Stay

4-star hotels or resorts	47.9%
5-star hotels or resorts	32.4%
3-star hotels	25.2%
Vacation home or other rental (i.e. Airbnb, VRBO or similar)	18.1%
Historic hotels	12.3%

Length of Stay



5.3 Days on Average

Travel Party

Spouse or significant other	72.5%
Children 12 and under	28.2%
Friend(s)	19.9%
Children 13-17	17.6%
Other family members	5.1%

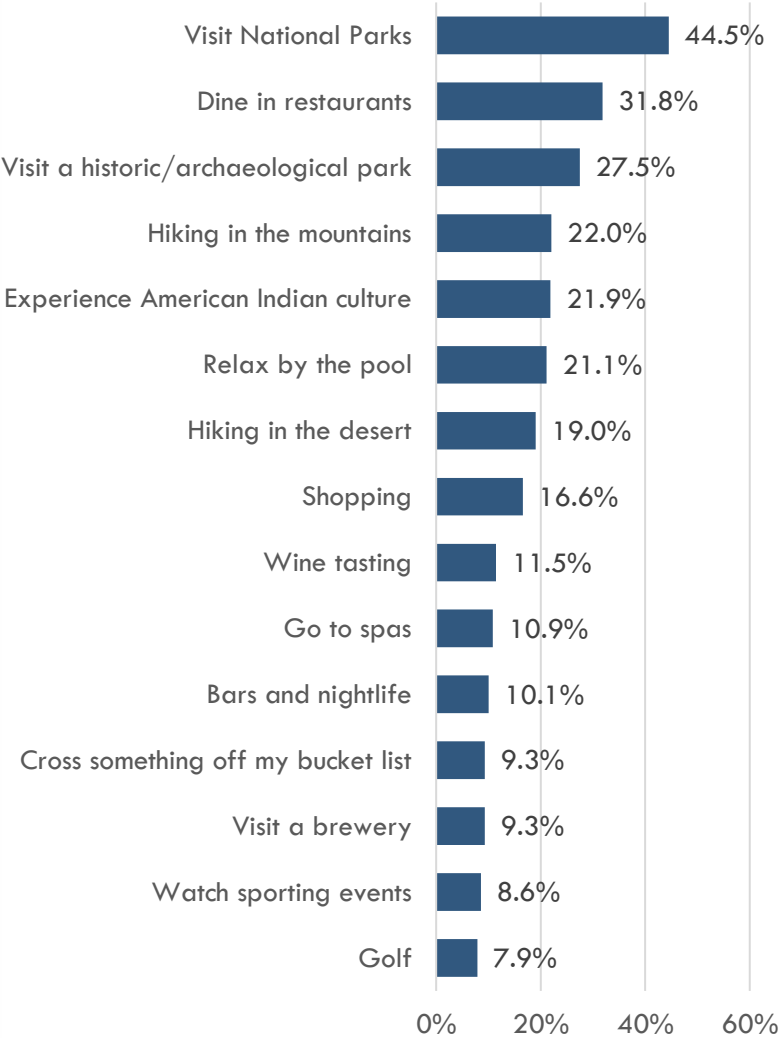
Average Daily Spending



\$490.69

Per Travel Party

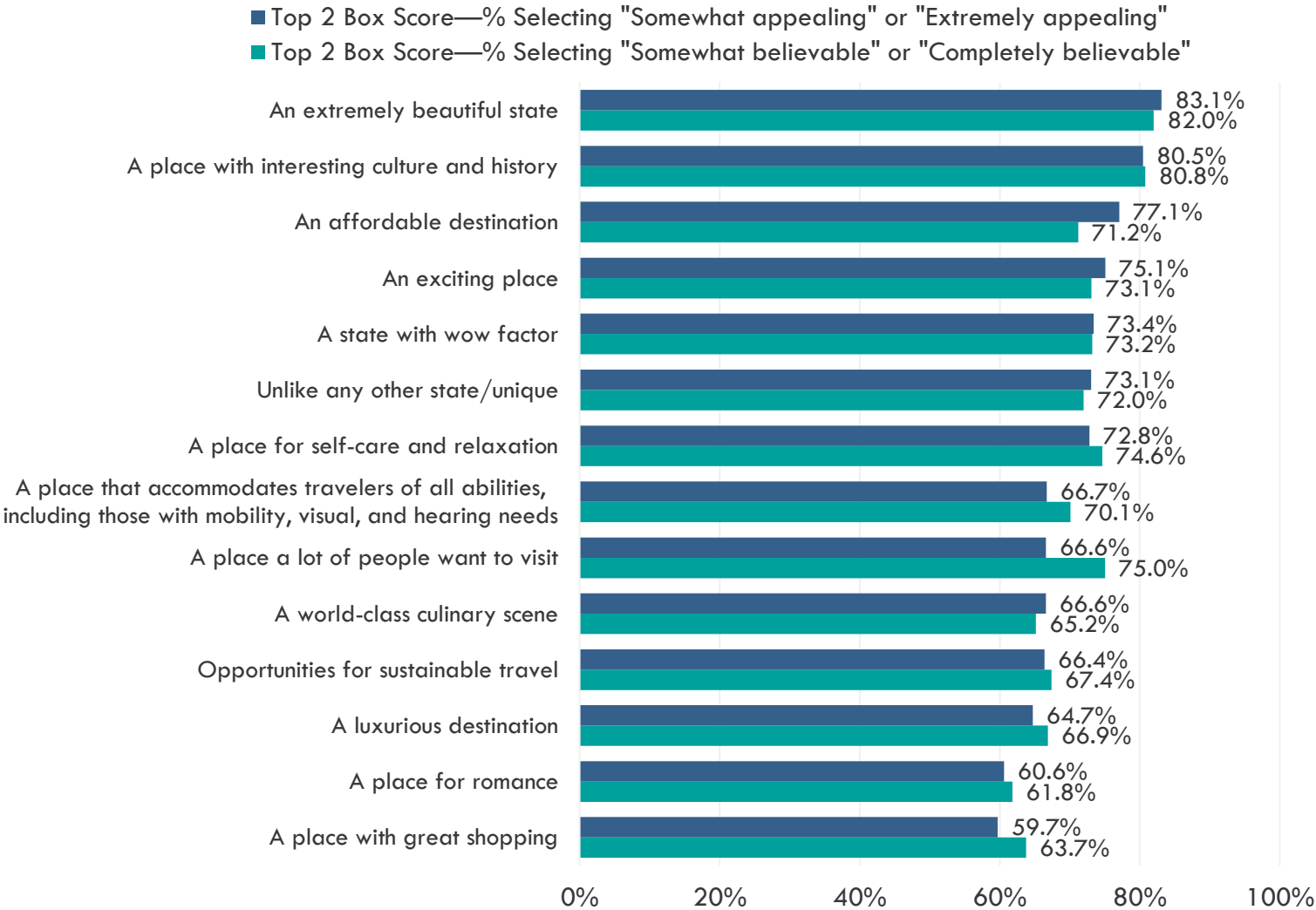
Top Arizona Activities



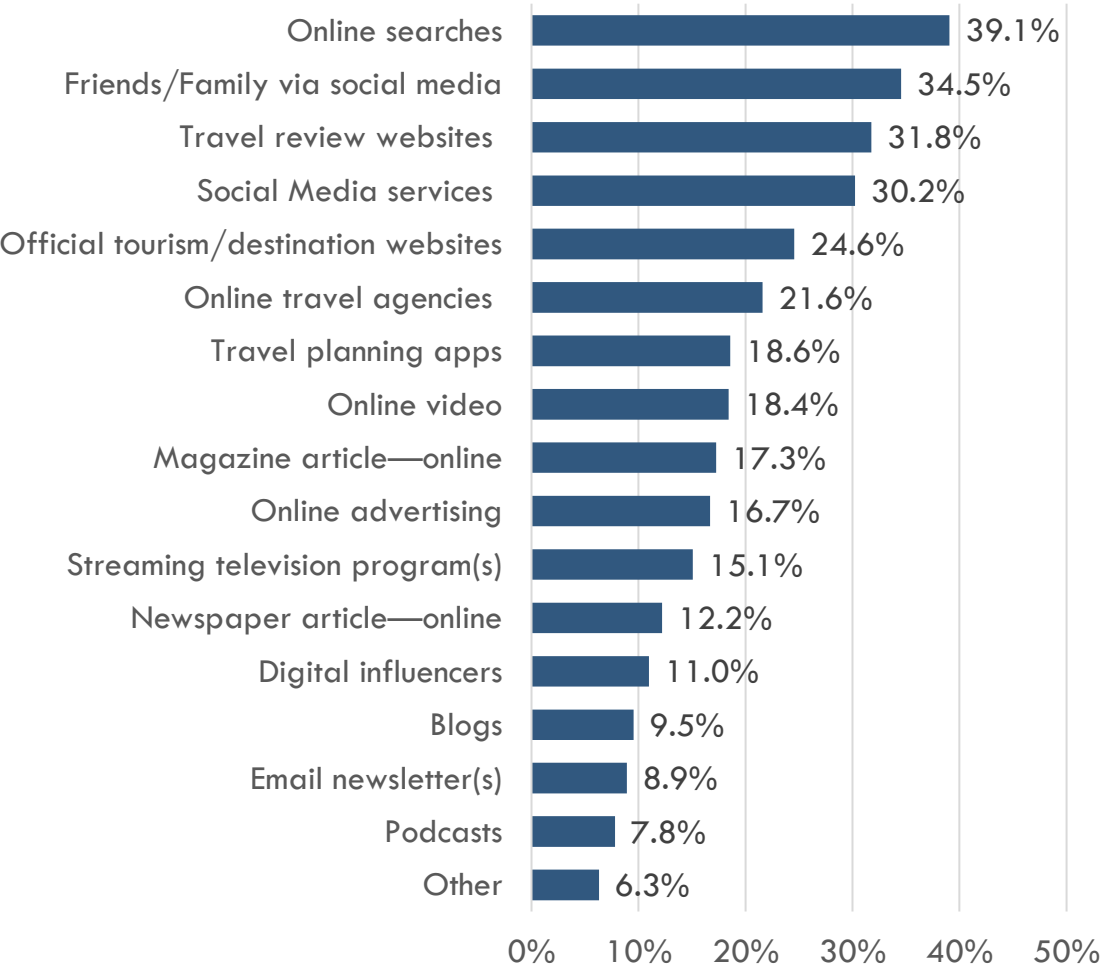
Most Appealing Arizona
Positioning Statements



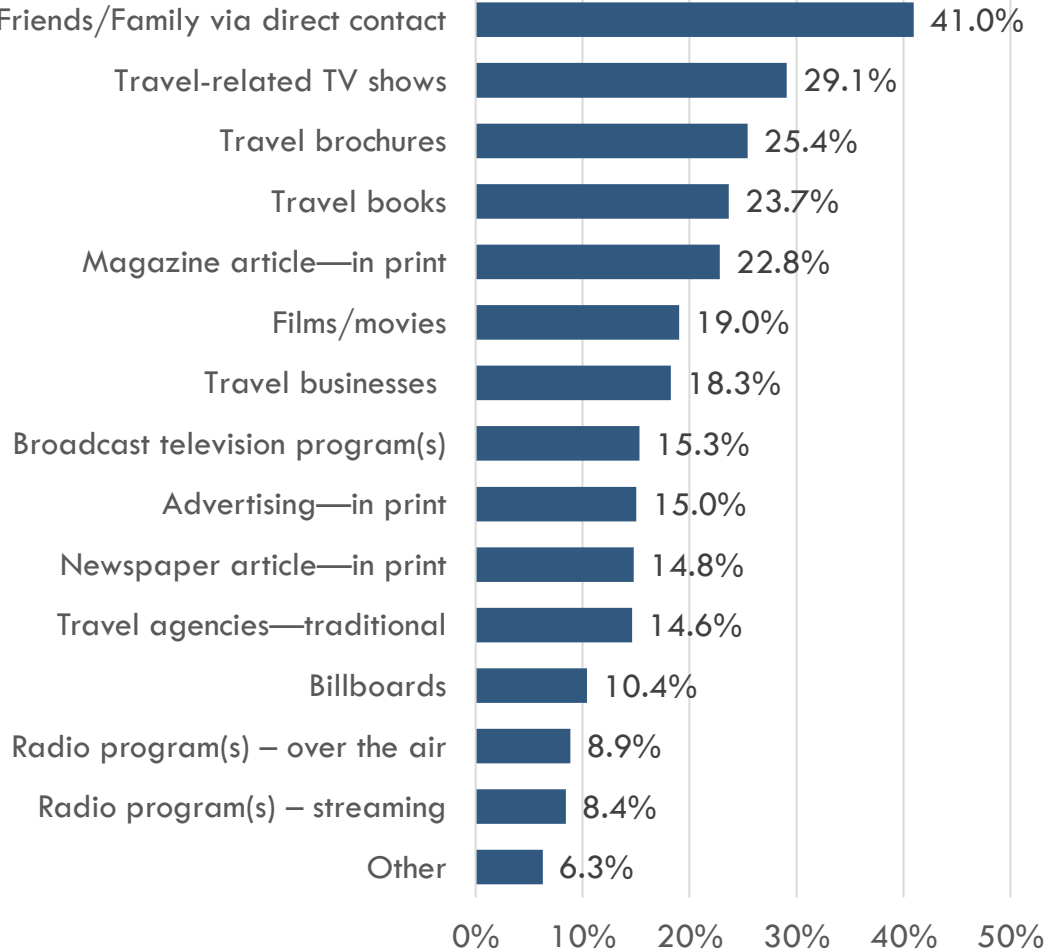
Most Appealing Arizona Statements vs. Most Believable Arizona Statements



Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration





NATURAL HISTORY LOVERS

912 COMPLETED SURVEYS.

KEY TAKEAWAYS

How to Market to Natural History Lovers

- Convenience, simplicity, new and enjoyable sum up the top general travel desires for Natural History Lovers. They want easy travel planning and logistics and while in-market they want to focus on new, unique and enjoyable experiences which include both cultural and outdoor activities.
- The indigenous history and landscape of Arizona set the state apart from other destinations for this audience and should be highlighted in market messaging to this group.
- Social media advertisements are the best way to reach these travelers, particularly Facebook and YouTube.

NATURAL HISTORY LOVERS

912 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all Natural History Lovers.

KEY CHARACTERISTICS

Characteristics (Natural History Lovers):

- Younger than average (44.8 years), Natural History Lovers are more affluent than the average leisure travelers (\$140,204 household income) and more of them live with children (59.8%). They travel slightly more than average (3.2 leisure trips in past year; 4.6 trips planned next two years).

Messaging:

- They and Luxury Travelers have the strongest familiarity (84.1%) and experience (57.5% visited in past 5 years) with Arizona, which helps Arizona's messaging breakthrough the clutter. They rank Arizona second (23.5%) only to California (27.6%) of six desired Southwest destinations to visit.
- A focus on nature should attract them since significantly more of them than average select being in nature (34.5%) as their favorite vacation activity, ranking second after dining (38.9%).
- Opportunities for adventure in Arizona already resonates with them (83.9%), as they choose it as their second-most highly rated feature for Arizona (after scenic beauty at 86.6%). Comparing importance to Arizona's ratings, welcoming and affordability show the largest negative gaps.
- Natural History Lovers, much more than average travelers, want to visit a place with interesting culture/history (85.1%), excitement (81.3%), a "wow" factor (80.0%), and uniqueness (80.0%).
- Family-oriented, they would include children (32.6% younger; 19.5% older) on an ideal trip to Arizona.
- More than average tourists, Natural History Lovers would visit a brewery (11.5%) while in Arizona.
- Their top deterrents are that it takes a lot of days to take a trip to Arizona (26.4%) and it is too hot/weather (25.9%). For them, "It's 80 Degrees Somewhere" (21.2%) stumbles as they prefer "Together is Better Here" (28.3%) and "Where Epic Reunions Happen" (24.8%) as better positioning statements.
- To reach them digitally, online searches (36.4%) top the list, like it does for average travelers, but social media services (33.4%) and travel review websites (31.6%) push friends/family via social media (31.4%), to fourth place.

NATURAL HISTORY LOVERS

Who they are



Gender

Female: 43.6%
Male: 55.4%
Non-binary/Transgender: 0.9%



Marital Status

Married/partnered: 77.6%
Single: 16.8%
Children under 18: 59.8%



Average Age: 44.8

Millennial or younger: 49.0%
Gen X: 28.2%
Boomer or older: 22.8%



Ethnicity

Caucasian: 78.3%
Non-Caucasian: 21.7%



Household Income

\$140,204



Physical, Visual, Auditory or Cognitive Disability

Disability: 23.5%



Top MSAs

Los Angeles-Long Beach, CA	7.2%	Chicago, IL	3.5%
New York, NY-NJ	5.7%	Atlanta, GA	2.7%
Orlando, FL	3.6%	Dallas-Fort Worth, TX	2.5%



**Average number of
leisure trips in
the past twelve months**



**Average number of
expected leisure trips
in the next two years**

TRAVELER PROFILE – NATURAL HISTORY LOVERS

Convenience, simplicity, new and enjoyable sum up the top travel desires for Natural History Lovers. The first two desires (convenient and simple) relate mostly to their travel planning and logistics, such as minimizing what they bring on their trips and ensuring minimal layovers on flights. For the actual in-market experience, this audience seeks out new sites, attractions and things to do—all of which should be locally driven (as opposed to mass market experiences you can get from any destination). Cultural immersion is also important for this group, particularly “old culture” with historical significance. Geology was also mentioned as playing a big part of their leisure trips.

Natural History Lovers consider a variety of factors in their destination inspiration process, from the recommendations of friends and family to online research. Interview participants shared that friends, family and online research on sites like Google or YouTube were the top ways they learned about new places they would like to visit. When choosing a place to travel to, travelers take cost, weather/season and location into consideration.

“I like nature, but I also like culture - like old culture, old buildings or historic sites. Those are my favorite things.”

“I research on Google and try to find everything online, I also use YouTube. There is lots of information on YouTube.”

TRAVELER PROFILE – NATURAL HISTORY LOVERS

“I look at active virus case numbers and will avoid high infection rate areas.”

“I haven’t traveled much since COVID, there are so many different restrictions and criteria depending on where you’re going and I worry about being quarantined.”

“We try to minimize indoor activities and flying. The airport is still not comfortable – there are lots of people. Flying itself is not that bad because everyone wears masks, but the airport is still scary.”

The current coronavirus situation has greatly impacted travel planning, as well as travel destinations and frequency.

Most participants shared that their travel behaviors have changed as a result of the COVID-19 pandemic. They’re travelling less, traveling closer to home and taking more road trips.

Other considerations around travel with regards to COVID-19 include:

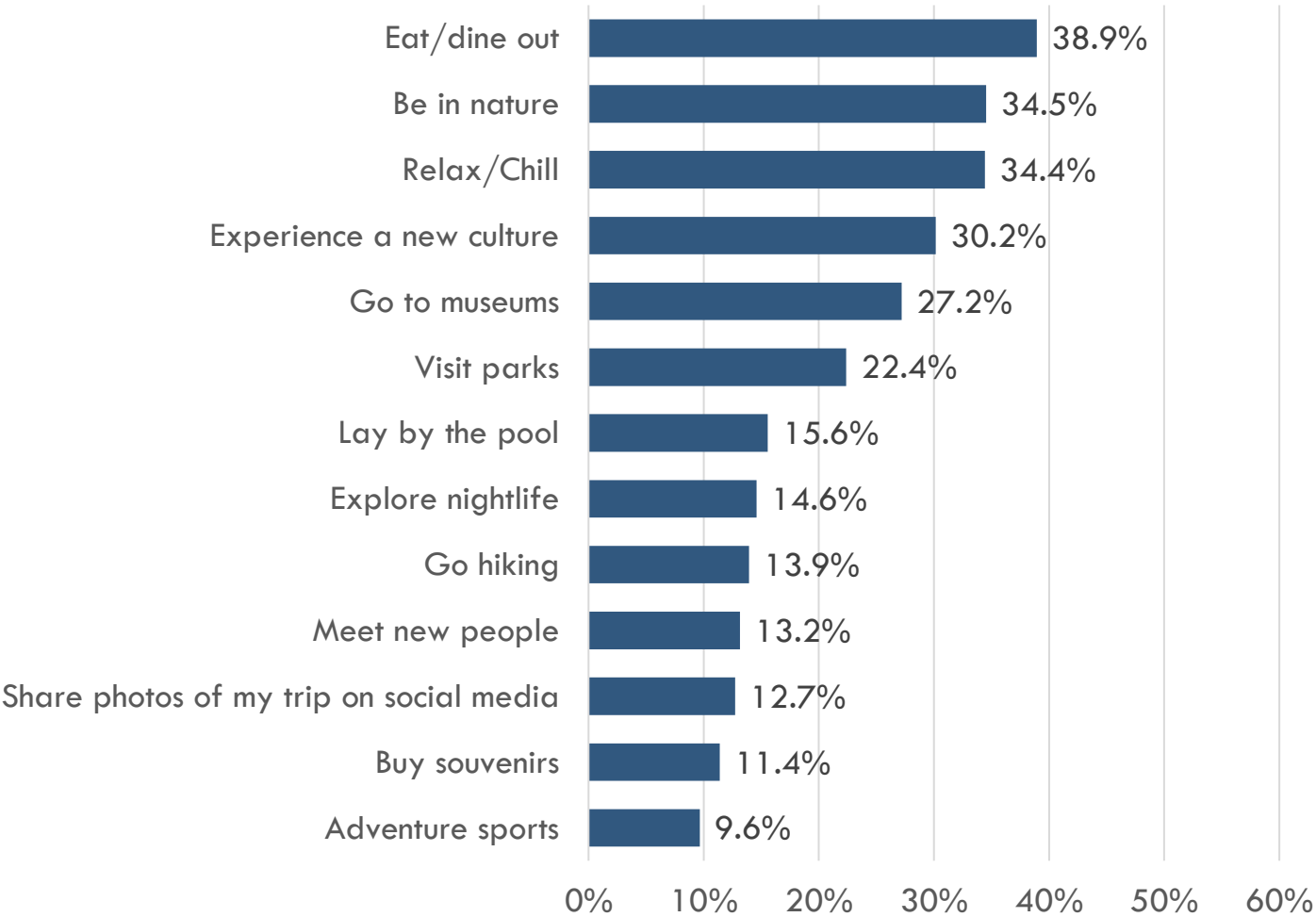
- The number of cases in a destination
- Avoiding high infection rate areas
- Prioritizing outdoor activities
- Avoiding indoor dining



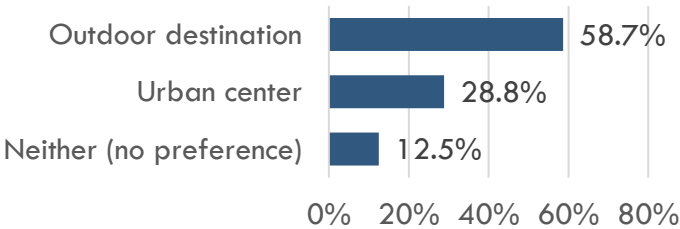
“I would try to stay outside as much as we can because we’ve been working from home. I also love exploring different cultures when we travel. I don’t like doing just touristy stuff.”

- Natural History Lover

Favorite Things to Do on Vacation



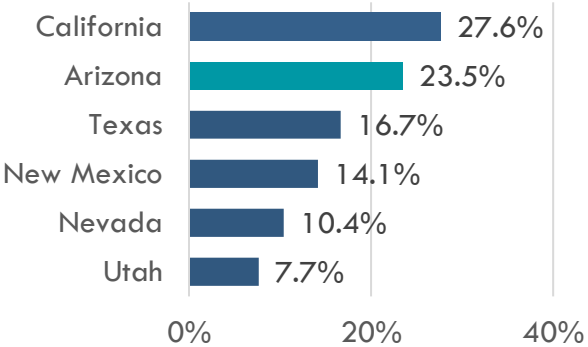
Preference for Outdoor Destination vs. Urban Center



Average Maximum Spend on Hotel Room

\$595.70

Desired Southwest Destinations to Visit



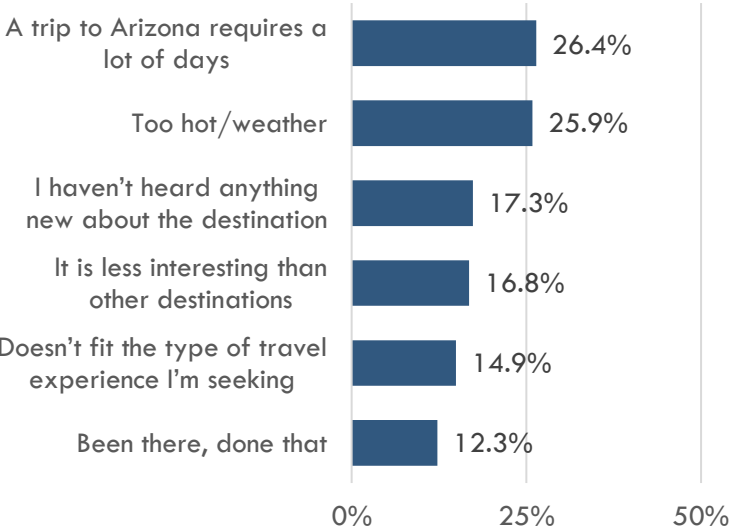
Familiarity with Arizona as a Place to Visit
(Top 3 Box Score—% selecting “slightly familiar,”
“familiar,” or “extremely familiar”) **84.1%**



Visited Arizona in the Past 5 Years **57.5%**

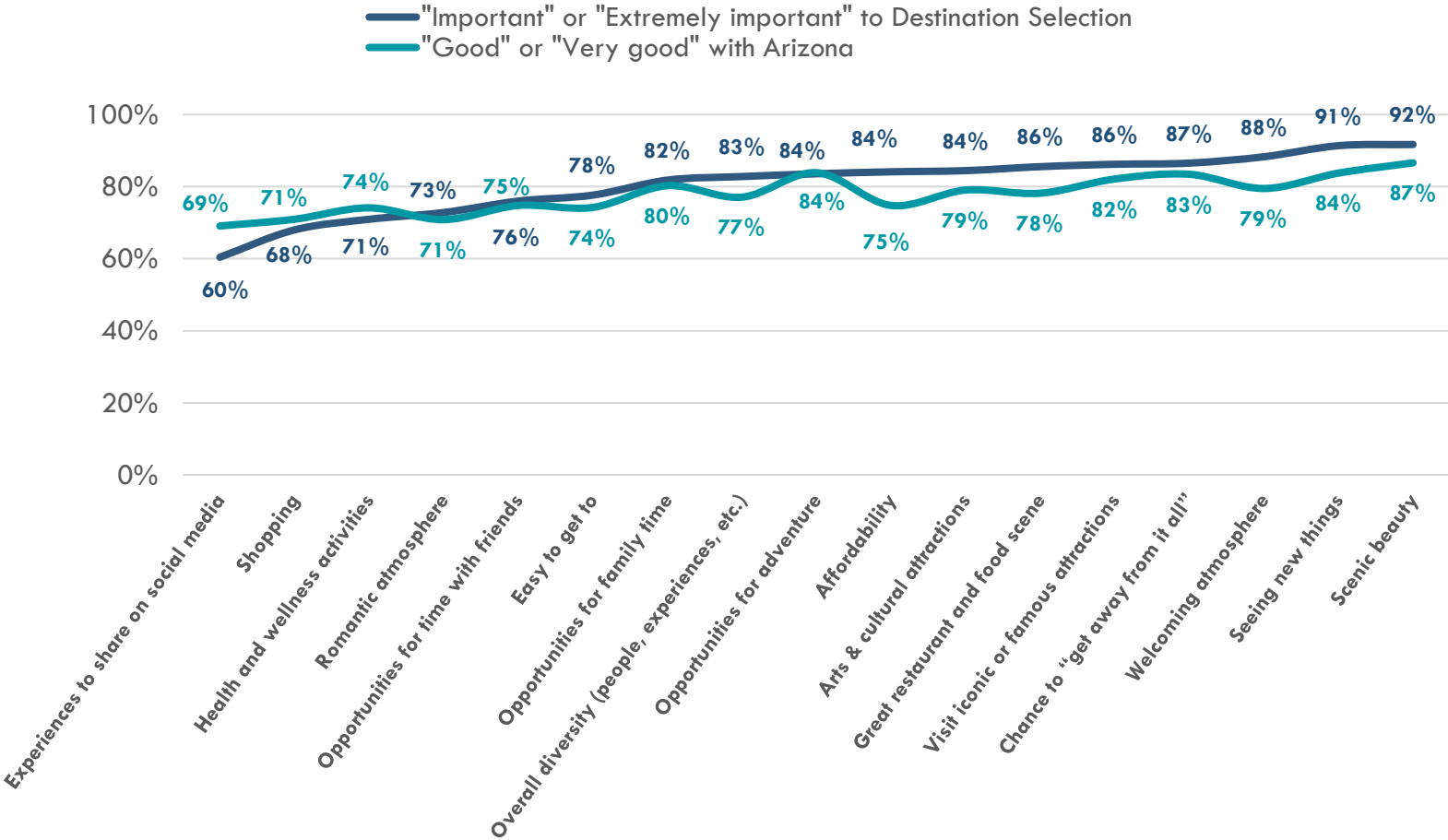


Top Reasons for Not Visiting Arizona in the Past 5 Years
(% of non-recent visitors)



Important Attributes for Destination Selection vs. Rating of Arizona's Attributes

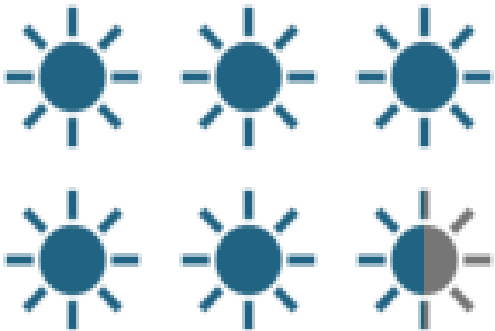
(Top 2 Box Score of those who rated “Important” or “Extremely important” vs. Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)



Place of Stay

5-star hotels or resorts	43.5%
4-star hotels or resorts	42.8%
3-star hotels	23.9%
Vacation home or other rental (i.e. Airbnb, VRBO or similar)	16.4%
Historic hotels	15.7%

Length of Stay



5.5 Days on Average

Travel Party

Spouse or significant other	73.0%
Children 12 and under	32.6%
Children 13-17	19.5%
Friend(s)	18.8%
Other family members	8.2%

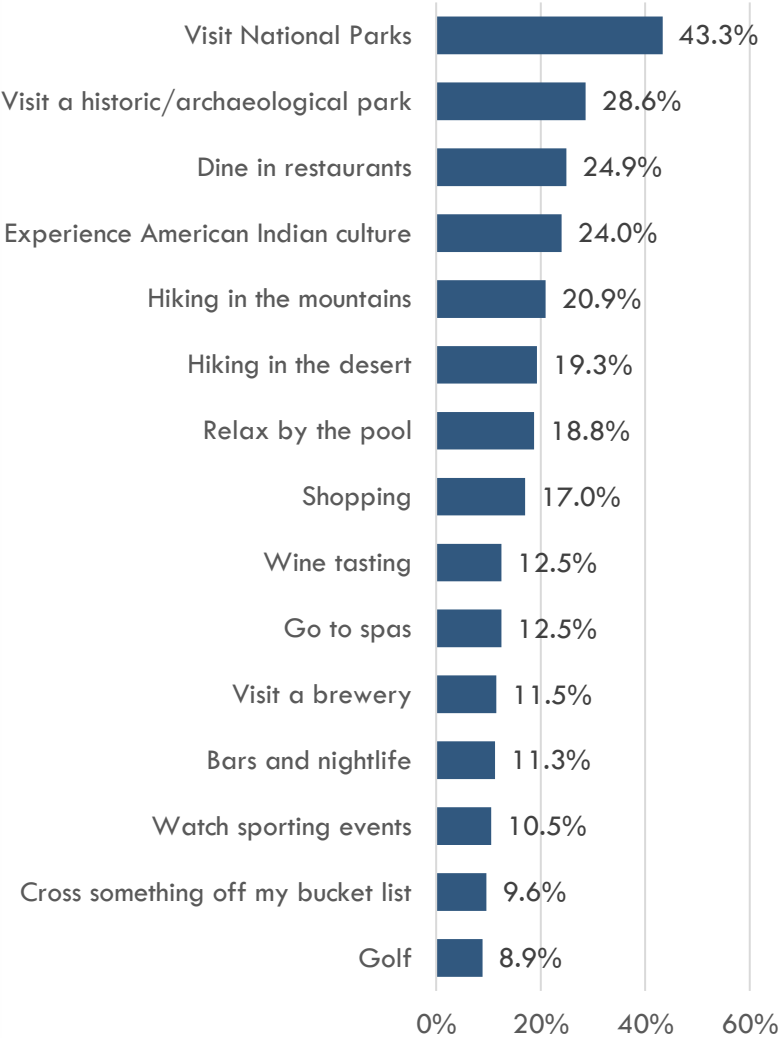
Average Daily Spending



\$555.72

Per Travel Party

Top Arizona Activities



MARKETING ARIZONA – NATURAL HISTORY LOVERS

“In Arizona you will find both beautiful nature and also unique indigenous culture.”

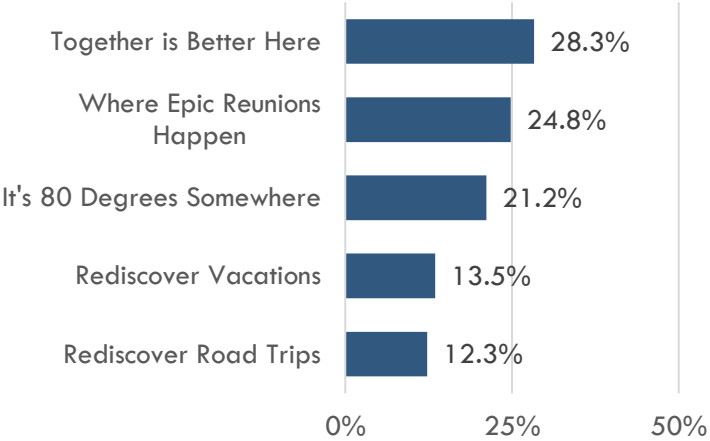
“A trip that includes new and unique experiences, friendships, getting an understanding of new cultures—that would help me appreciate the time I’m in Arizona and really embrace it.”

“YouTube is not limited like a 30 second ad on TV. You can make a very long beautiful advertisement. I watch them a lot.”

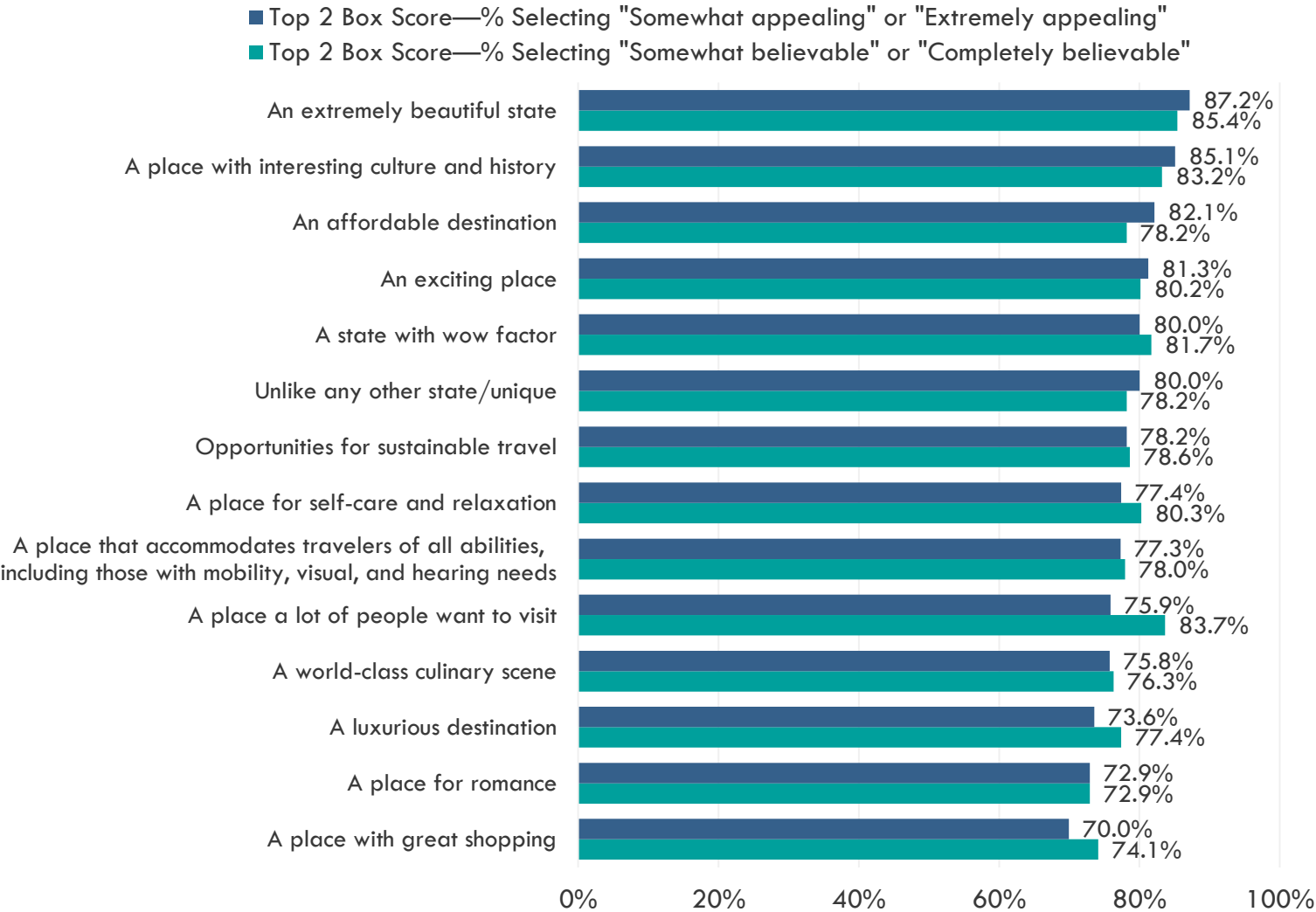
Arizona’s affordability, along with its abundance of activities, sets it apart from other destinations for this audience. In particular, the history and culture of Arizona makes the state unique in the minds of Natural History Lovers. If they were to visit Arizona in the next 12 months, this group would be most excited to drive Route 66, visit the Grand Canyon and participate in outdoor activities like hiking and visiting national parks in addition to learning about the culture. When asked what would convince them to visit Arizona, respondents mentioned new and unique activities/places as something that would motivate a trip to the state. It should also be noted that one Natural History Lover mentioned they could not easily find information about the indigenous places/culture in Arizona and said that these cultural experiences should be promoted more as it is really unique to the state.

Social media and YouTube were mentioned as the best way for Arizona to reach this persona and motivate them to visit.

Most Appealing Arizona Positioning Statements



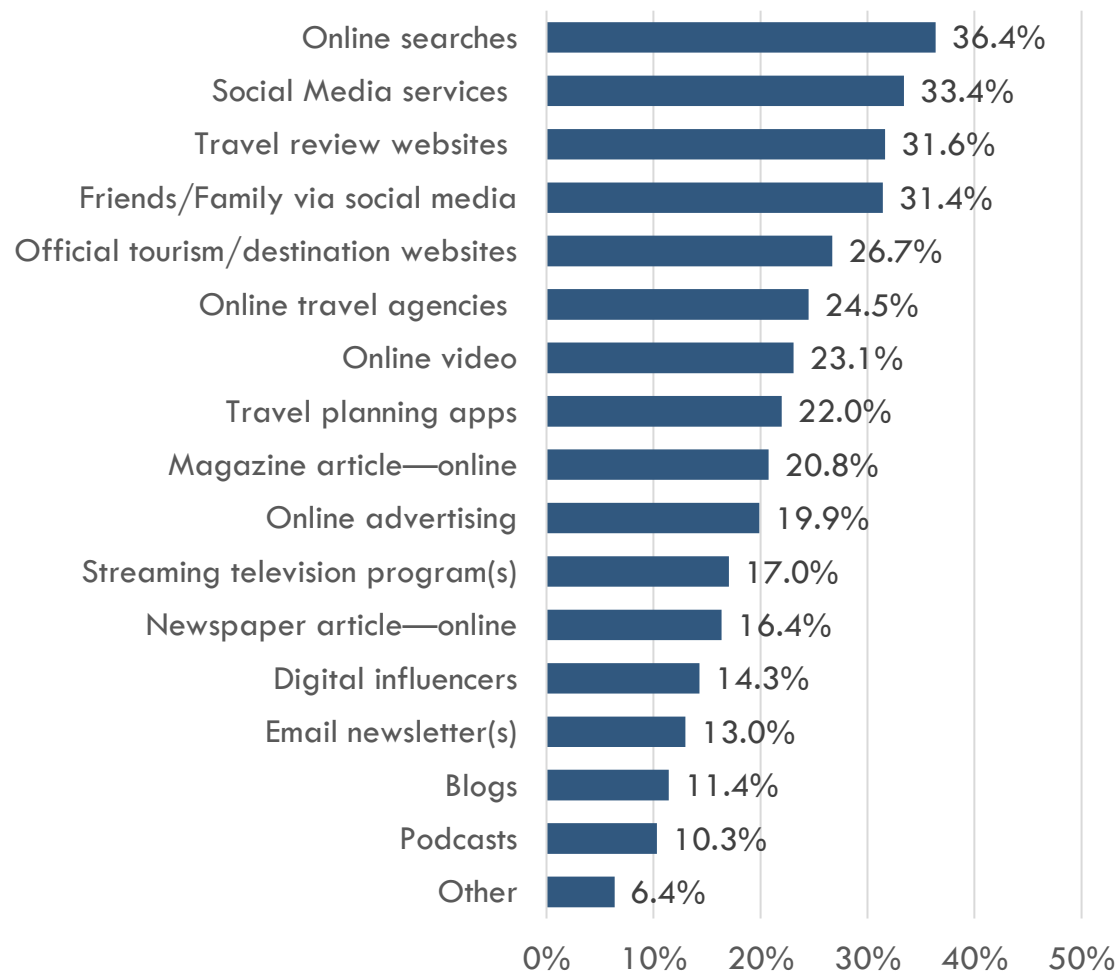
Most Appealing Arizona Statements vs. Most Believable Arizona Statements



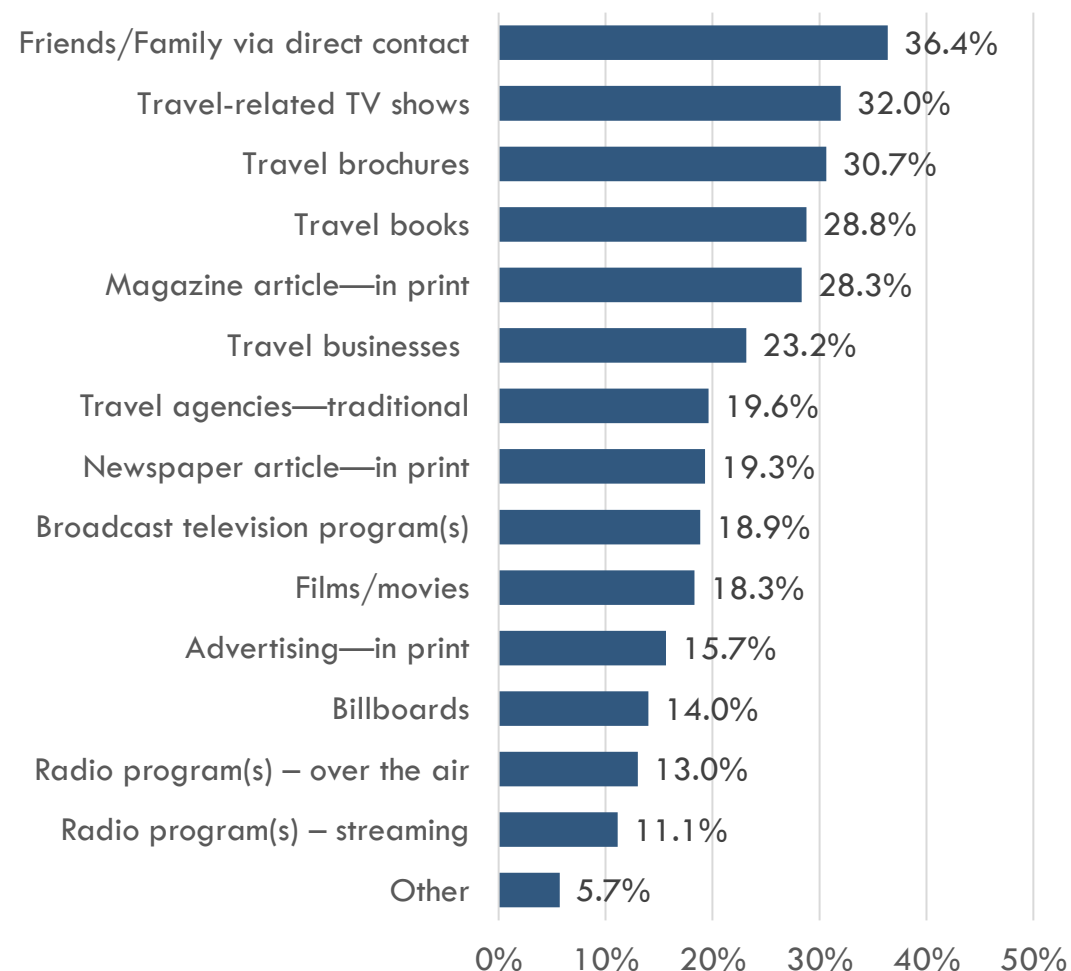
NATURAL HISTORY LOVERS

How to Reach This Audience

Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration



“Arizona is very unique. There are lots of cultural things in the state — it is the most important and distinctive thing about Arizona.”

-Natural History Lover





LUXURY TRAVELERS

566 COMPLETED SURVEYS.

KEY TAKEAWAYS

How to Market to Luxury Travelers

- Pre-planning their trips to ensure maximized comfort and convenience is a top priority for Luxury Travelers. As such, messaging about the ease of access to the state will increase their consideration of Arizona for a future trip.
- The primary experiential desires of this group would be relaxation, rejuvenation and escape in a warm weather setting which Arizona can certainly deliver. Add a feeling of exclusivity, and they're hooked.
- While Arizona's incredible scenic beauty is considered a major draw for this group, showing the accessibility of these natural assets from an urban hub that offers a variety of activities and experiences (such as dining, museums, theater performances, shopping, nightlife, professional sporting events and laying by the pool) will appeal to them.

LUXURY TRAVELERS

566 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all Luxury Travelers.

KEY CHARACTERISTICS

Characteristics (Luxury Travelers):

- The oldest (50.6 years) and most affluent (\$237,649 household income) persona, half (51.4%) live with children under 18. They travel more than any other persona (3.6 leisure trips in past year; 5.4 trips planned next two years). Consistent with high incomes, they would spend much more per day than any other persona on a trip to Arizona (\$638).

Messaging:

- Luxury Travelers, along with Natural History Lovers, have the strongest familiarity (84.5%) and experience (57.4% visited in past 5 years) with Arizona, which helps them hear Arizona's messaging. Further, Arizona ranks second (25.4%) only to California (28.3%) of six desirable Southwest destinations to visit.
- After cuisine (40.6%) and relaxing (37.8%), their favorite things to do on vacation are to experience a new culture (30.7%) and be in nature (26.3%), so a focus on uniqueness and adventure should attract them. While they head toward urban centers more than any other persona (37.5%), outdoor destinations still leads (46.5%).
- They already recognize Arizona's opportunities for seeing new things and "getting away" (both at 78.3%), choosing those as leading features for Arizona (after scenic beauty at 84.8%).
- Affordability is not a concern for them as it is for average travelers, rather, their largest gaps between importance and Arizona's attributes is for welcoming atmosphere (85.0% important; 73.1% rating) and cuisine (82.3%; 72.1%).
- Similarly, the two most appealing statements for them for Arizona are "an extremely beautiful state" (82.0%) and "a place with interesting culture and history" (80.4%). All Arizona messaging should be effective, as they note little difference between Arizona's appeal and believability.
- In Arizona, Luxury Travelers would join Foodies for dining (36.7%) and although less than Self-Care Seekers, more of them would visit a spa (13.8%) and more of them want to golf (12.2%) than those in any other persona.
- Their top deterrent is that they find Arizona too hot/weather (28.2%), followed closely by less interesting than other destinations (25.6%). They clearly prefer "Together is Better Here" (29.3%) as the best positioning statement.
- To reach them digitally, online searches top the list (40.4%), similar to average travelers.

LUXURY TRAVELERS *Who they are*



Gender

Female: 39.8%
Male: 59.9%
Non-binary/Transgender: 0.4%



Marital Status

Married/partnered: 84.5%
Single: 11.7%
Children under 18: 51.4%



Average Age: 50.6

Millennial or younger: 35.2%
Gen X: 27.7%
Boomer or older: 37.1%



Ethnicity

Caucasian: 77.0%
Non-Caucasian: 23.0%



Household Income

\$237,649



Physical, Visual, Auditory or Cognitive Disability

Disability: 21.6%



Top MSAs

Los Angeles-Long Beach, CA	8.2%	Phoenix-Mesa, AZ	3.6%
San Francisco-Oakland, CA	5.4%	Atlanta, GA	2.9%
New York, NY-NJ	4.8%	Chicago, IL/Philadelphia, PA-NJ/Dallas-Ft. Worth, TX	2.7%



**Average number of
leisure trips in
the past twelve months**



**Average number of
expected leisure trips
in the next two years**

TRAVELER PROFILE – LUXURY TRAVELERS

Safety, comfort and a hassle-free travel journey were among the most important aspects to Luxury Travelers when they take their trips. Despite prioritizing luxury experiences while traveling, value and great deals are also an important consideration for these travelers. Because of this the propensity to pre-plan all aspects of their trip is high to ensure a smooth travel experience from start to finish.

These Luxury Travelers' ideal trip centers around opportunities for relaxation, preferably in a warm weather environment. However, stimulating activities are also important which can include outdoor activities and special events. In line with their desire for comfort and convenience, ease of access and walkability of a destination were also called out as being important parts of their ideal leisure trip.

“How smooth the trip goes is important to me, I try to plan everything in advance, I’m talking about transportation, airfare, hotel, activities and amenities”

“On my ideal trip I want to go somewhere that has opportunities to relax so I can unwind, but I also like stimulation.”

TRAVELER PROFILE – LUXURY TRAVELERS

Luxury travelers use a variety of sources for inspiration and while online resources were mentioned most often, word of mouth, magazines, movies and television were also mentioned. Most often though, Luxury Travelers turn to general internet searches, traveler review sites and YouTube as sources of inspiration for new places to visit. Additionally, advertisements from travel related sites are also relied upon.

Due to the pandemic, Luxury Travelers shared that they've needed to do even more research before traveling. Factors such as availability of attractions and activities, in addition to information about infection and vaccination rates were main areas of concern for this audience. Like other traveler personas, this segment is currently avoiding international travel and more often opting to travel by car for their domestic trips as opposed to flying.

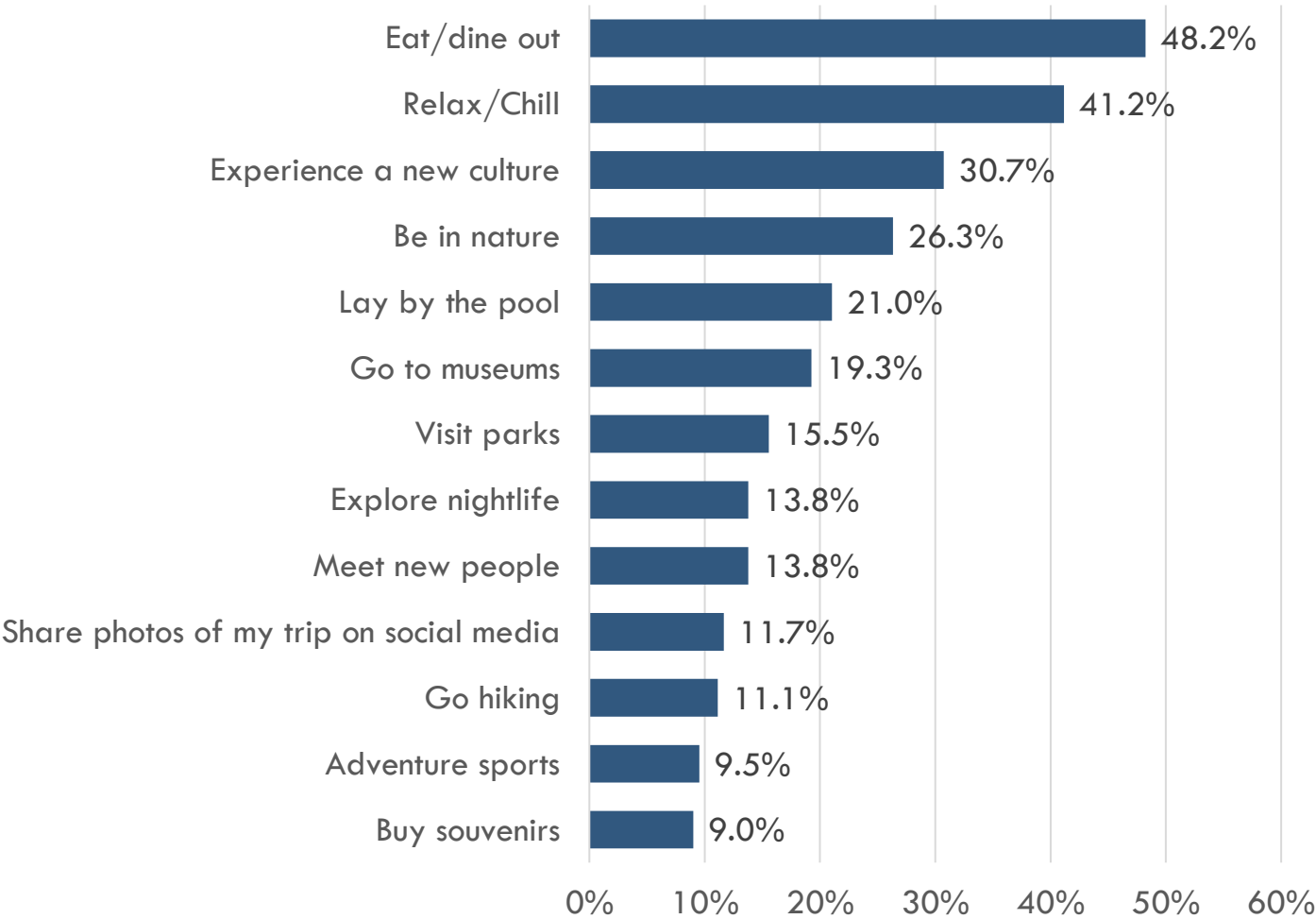
“I usually always start with a search engine, whether it is Google or Yahoo or Bing.”

“It is quite challenging because I never know what is open. Sometimes the website might say one thing, but then I come to find that is not the reality, so I’m having to do more research now.”

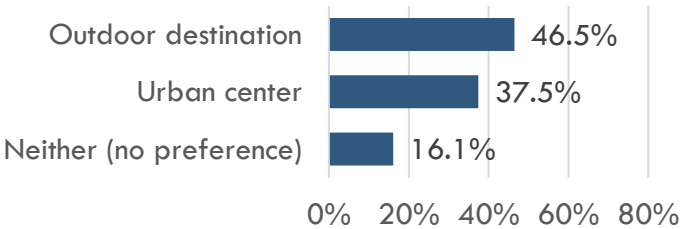
*“Safety and comfort are
most important to me
when I travel. It’s stressful
if my entire trip is not
planned in advance.”*



Favorite Things to Do on Vacation



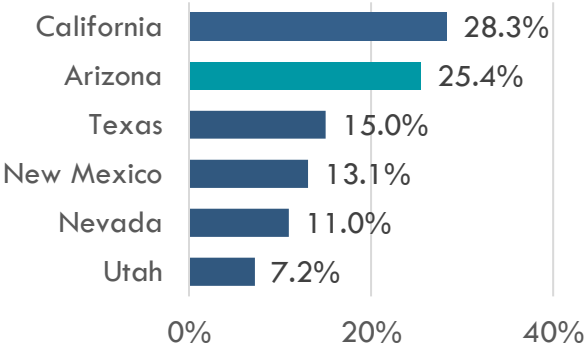
Preference for Outdoor Destination vs. Urban Center



Average Maximum Spend on Hotel Room

\$711.02

Desired Southwest Destinations to Visit



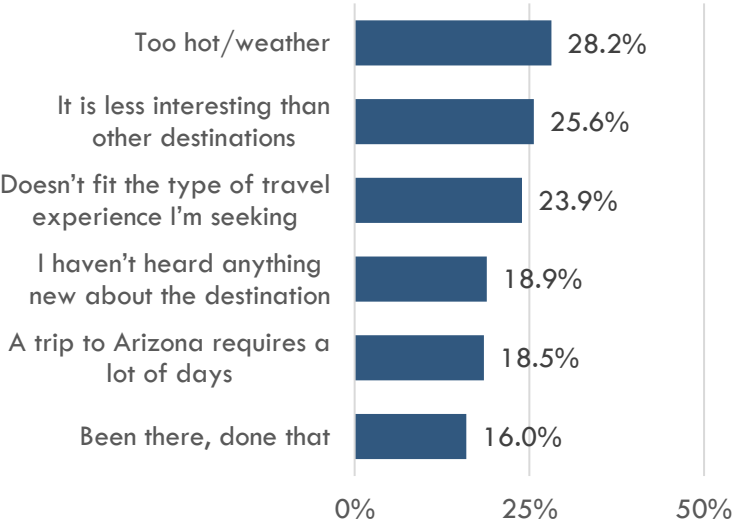
Familiarity with Arizona as a Place to Visit
(Top 3 Box Score—% selecting “slightly familiar,” “familiar,” or “extremely familiar”) **84.5%**



Visited Arizona in the Past 5 Years **57.4%**



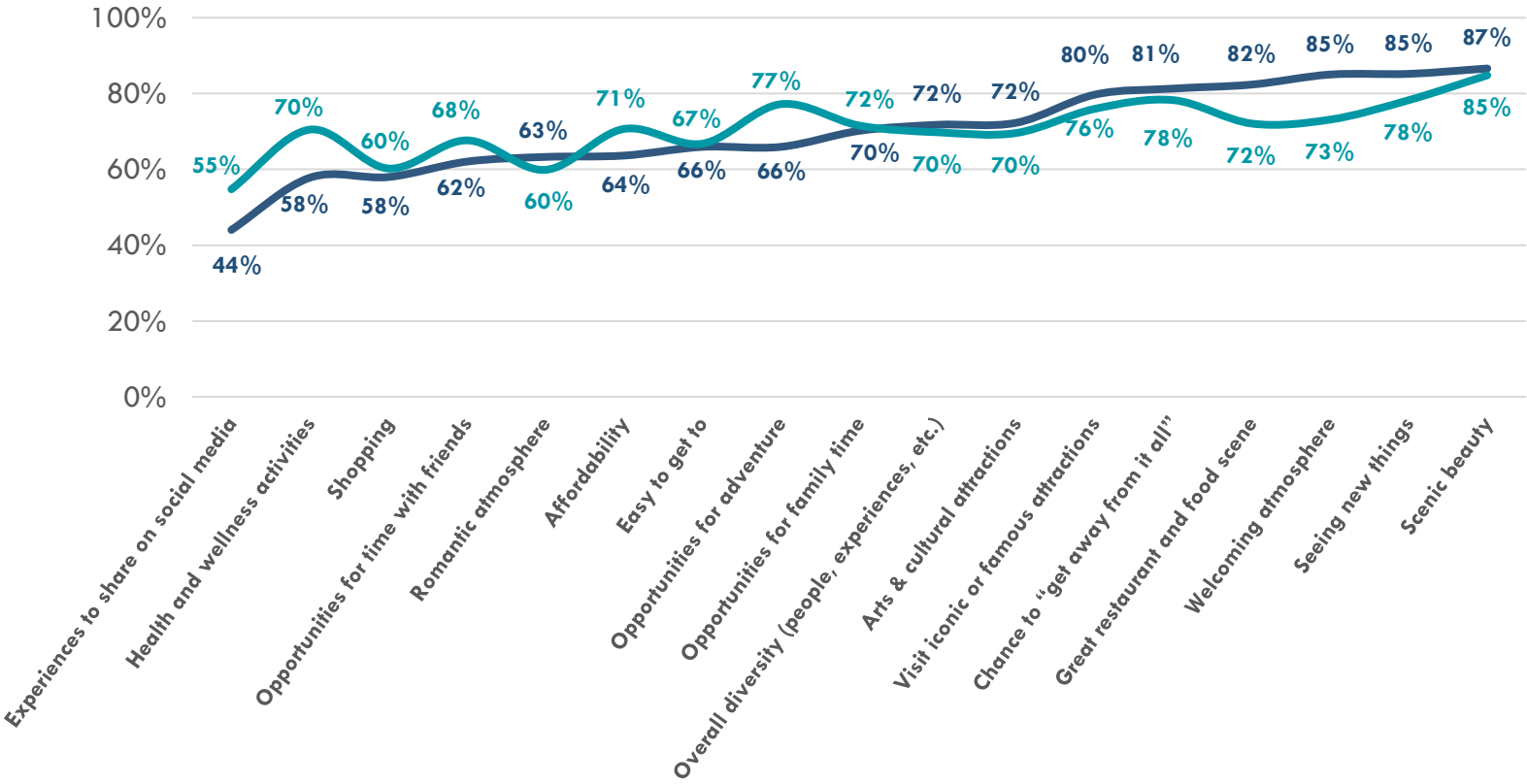
Top Reasons for Not Visiting Arizona in the Past 5 Years
(% of non-recent visitors)



Important Attributes for Destination Selection vs. Rating of Arizona's Attributes

(Top 2 Box Score of those who rated “Important” or “Extremely important” vs. Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)

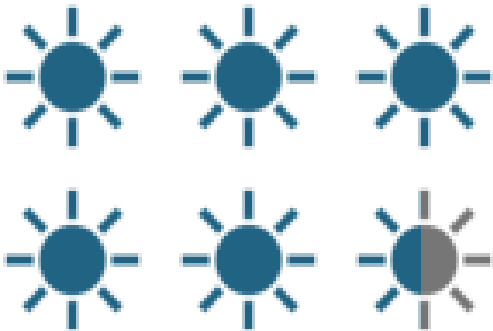
— "Important" or "Extremely important" to Destination Selection
— "Good" or "Very good" with Arizona



Place of Stay

5-star hotels or resorts	53.0%
4-star hotels or resorts	51.6%
3-star hotels	14.1%
Boutique hotels	12.5%
Historic hotels	11.8%

Length of Stay



5.4 Days on Average

Travel Party

Spouse or significant other	79.0%
Children 12 and under	24.9%
Children 13-17	19.8%
Friend(s)	16.4%
Other family members	6.9%

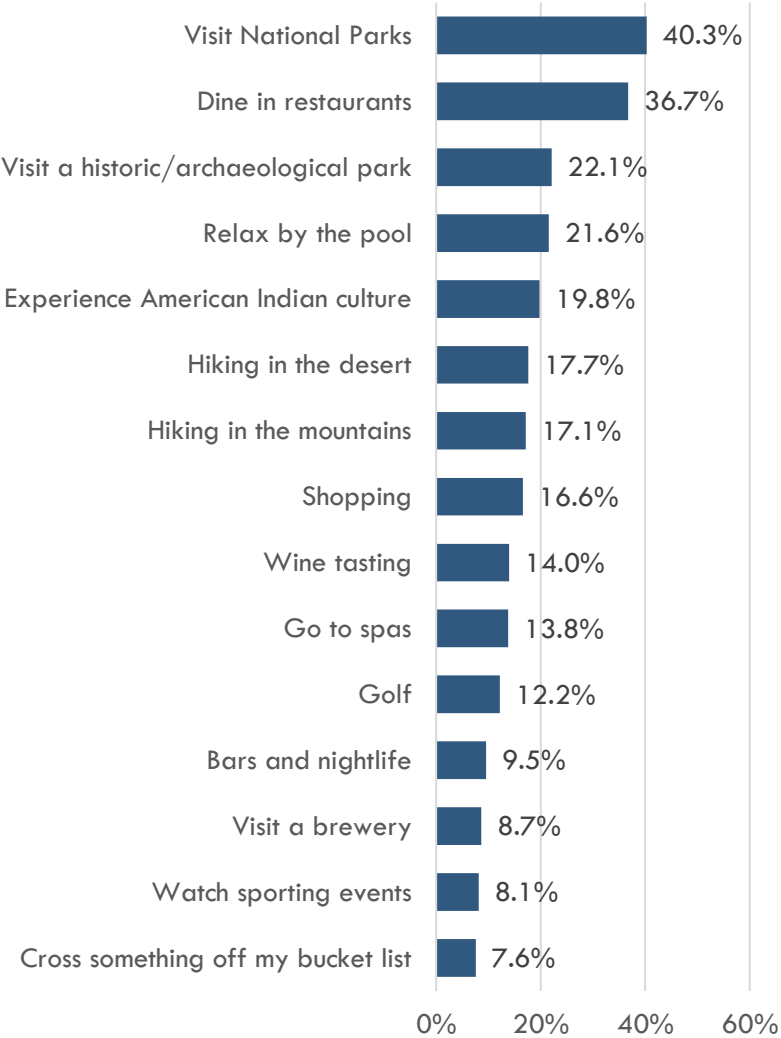
Average Daily Spending



\$638.34

Per Travel Party

Top Arizona Activities



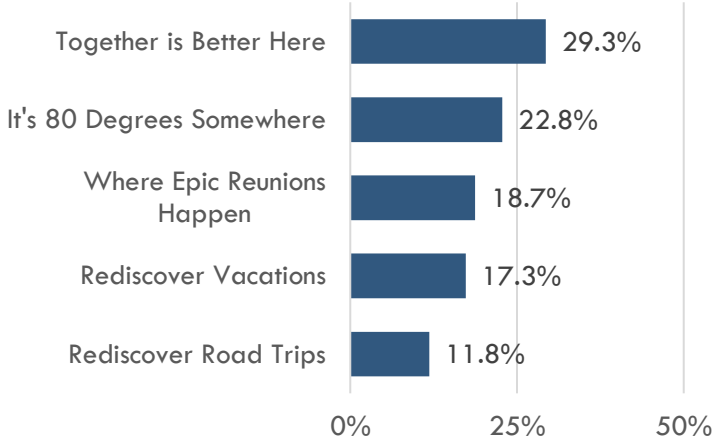
MARKETING TO LUXURY TRAVELERS



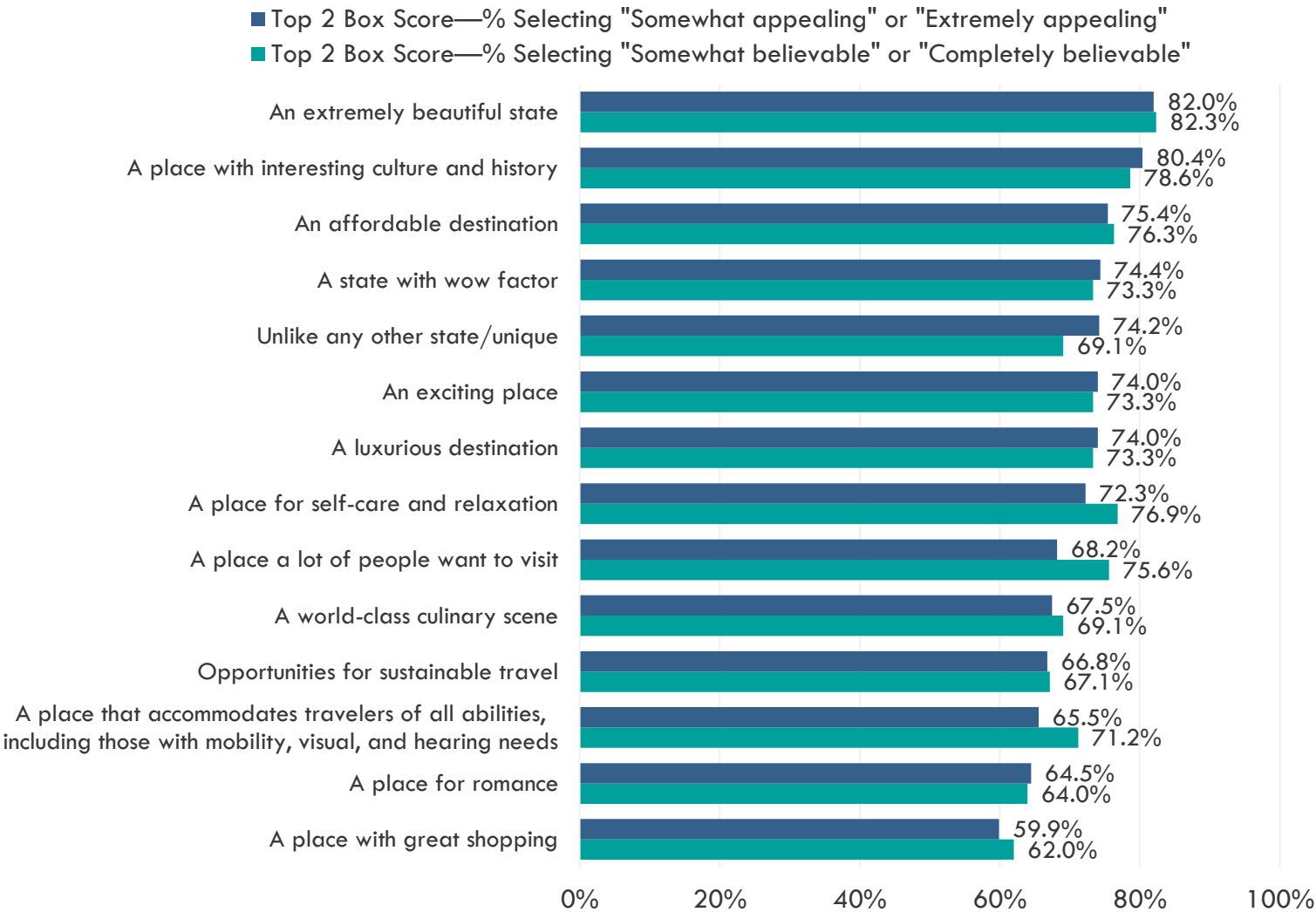
“My wife’s birthday is coming up, maybe we would go stay at a nice luxury hotel where she can be pampered.”

Luxury accommodations, unique experiences and a variety of activities are what this group will seek out for an Arizona trip specifically. The primary experiential desires of this group would be relaxation, rejuvenation and escape in a good weather setting which Arizona can certainly deliver on. Interestingly, while outdoor activities such as hiking, scenic views and canyon drives are of interest to this audience, they want these recreational opportunities to be accessible (e.g., close to a more urban setting) so they can easily pair these experiences with visits to museums, theater performances, shopping, nightlife, professional sporting events and laying by the pool. Still though, emphasizing the natural beauty and unique landscapes in the state will grab the attention of this audience.

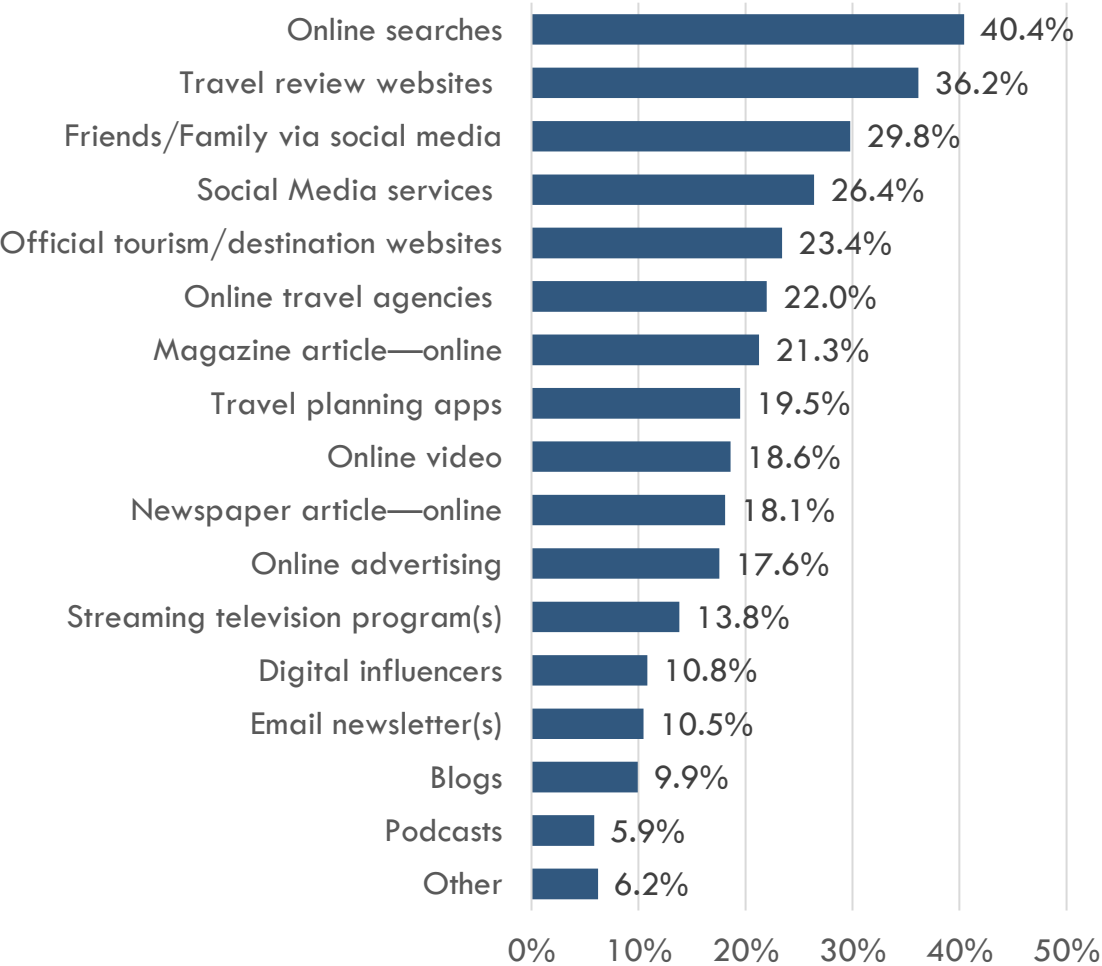
Most Appealing Arizona
Positioning Statements



Most Appealing Arizona Statements vs. Most Believable Arizona Statements



Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration



“I think it is just the scenic landscape overall that makes it [Arizona] unique to other states and you can do that in a warm climate for more months out of the year than other states.”



SELF-CARE SEEKERS

1,401 COMPLETED SURVEYS.

KEY TAKEAWAYS

How to Market to Self-Care Seekers

- Self-Care Seekers love to include spa experiences in their travel plans but almost more importantly their main travel motivation is relaxation and being able to relieve stress. They attend to their self-care.
- Unique to Self-Care Seekers is their higher propensity to consider quality, comfort and time when choosing a travel destination. These travelers may be big spenders or may be traveling on a budget, but they are willing to spend more for quality experiences that directly impact their comfort and time.
- To inspire leisure travel, Self-Care Seekers can be reached through social media marketing, particularly Instagram and general word of mouth.

SELF-CARE SEEKERS

1,401 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all Self-Care Seekers.

KEY CHARACTERISTICS

Characteristics (Self-Care Seekers):

- The second-youngest group at 40.2 years, their affluence (\$126,898 household income) resembles the Wild Bunch and Foodies. Two-thirds (66.7%) have children under 18. They take an average number of trips (3.0 leisure trips in past year; 4.3 trips planned next two years).

Messaging:

- They place in the middle of the personas for familiarity with Arizona (82.1%) and past-five-year visits (54.6%). Because Arizona is on their “radar,” they are likely to hear its messaging. Of six desirable Southwestern states, Arizona ranks second (21.1%) after California (31.5%), but sits only slightly ahead of Texas (19.8%).
- As noted for other personas, a nature focus should attract them. More than Luxury Travelers, but less than the Wild Bunch, being in nature (31.3%) is a favorite vacation thing to experience, ranking third after dining (40.9%) and relaxing (38.3%). They also strongly prefer outdoor destinations (55.5%) to urban centers (34.3%).
- Self-Care Seekers praise every aspect of Arizona significantly above average travelers, topped by scenic beauty (85.2%) and seeing new things (84.9%). Their leading “disconnect” between importance and Arizona ratings is cuisine/dining (86.4% importance; 80.2% rating), rather than affordability, as noted for average travelers.
- Arizona’s appealing statements and believability are typically similar, so promoting it as an extremely beautiful state (84.9% appealing) state with an interesting culture/history (83.5%) works. In addition, and more than any other persona, self-care and relaxation (83.5%) appeals to them.
- Family-oriented, many would include children (37.8% younger, 21.3% older) on an ideal trip to Arizona.
- While in Arizona, Self-Care Seekers have the greatest interest among the personas of relaxing by the pool (24.9%), shopping (21.6%), going to spas (17.5%), and enjoying bars/nightlife (13.3%).
- Finding a way to reach Self-Care Seekers is key to drawing them to Arizona; their leading deterrent, besides travel time (22.0%), is “haven’t heard anything new about it” (20.7%) and they advise that “Together is Better Here” (35.3%) is, by far, the best positioning statement for them.
- To reach Self-Care Seekers digitally, social media services (36.8%) top the list, followed by friends/family via social media (34.5%). That pushes online searches, the top digital source of average travelers, to third place (33.2%).

SELF-CARE SEEKERS *Who they are*



Gender

Female: 45.0%
Male: 54.0%
Non-binary/Transgender: 1.0%



Marital Status

Married/partnered: 73.2%
Single: 21.6%
Children under 18: 66.7%



Average Age: 40.2

Millennial or younger: 60.0%
Gen X: 27.6%
Boomer or older: 12.4%



Ethnicity

Caucasian: 71.9%
Non-Caucasian: 28.1%



Household Income

\$126,898



Physical, Visual, Auditory or Cognitive Disability

Disability: 19.2%



Top MSAs

Los Angeles-Long Beach, CA	6.9%	Chicago, IL	3.7%
New York, NY-NJ	5.7%	Atlanta, GA	3.4%
Orlando, FL	3.9%	Dallas-Fort Worth, TX/Washington DC-MD-VA	2.7%



**Average number of
leisure trips in
the past twelve months**



**Average number of
expected leisure trips
in the next two years**


TRAVELER PROFILE – SELF-CARE SEEKERS

Self-Care Seekers are most motivated to travel for relaxation, self-care and rejuvenation experiences. When selecting a travel destination, these travelers strongly value quality and comfort over other conveniences. While Self-Care Seekers are similar to Luxury Travelers in that they don't mind spending more for quality, Self-Care Seekers aren't necessarily big spenders and can even be traveling on a budget.

While this persona demonstrates multiple travel interests, a common theme underlying these interests is relaxation. Interview participants who were identified as Self-Care Seekers shared that relaxation is more than just a spa experience and can also include other aspects of stress-free travel, such as great customer service, authentic restaurants, as well as immersing yourself in culture, history and local communities. Relaxation can mean doing nothing, but it can also mean being active to some travelers. The Self-Care Seeker who prefers an active vacation reports being relaxed by having quality things to do and being able to share those experiences.

“Quality and comfort are major factors. I set my budget ahead of time, but I’m willing to spend more for a better experience.”

“Having an opportunity to truly relax is so valuable. I don’t want to feel like I need a vacation when I get back from my vacation.”



“Nightlife is not a top motivator.

*To me that’s not relaxing and
relaxation is what I’m most
looking for in a trip right now.”*


-Self-Care Seeker

TRIP PLANNING – SELF-CARE SEEKERS

“Comfort is a big factor in all parts of the travel experience, not just the spa.”

“I’m not anti-mask, but flying long distances in a mask can become uncomfortable so recent trips have been regional or drivable.”

The current coronavirus situation has impacted travel planning for all travelers nationwide, and Self-Care Seekers are no exception. These travelers report higher than average levels of anxiety about travel in the near-term. Interview participants reported a recent tendency to travel regionally or by car due to safety concerns and expressed that comfort is an important consideration in all aspects of the travel experience. Some Self-Care Seekers said they consider first-class airfare and other similar travel luxuries because they perceive them to be safer.



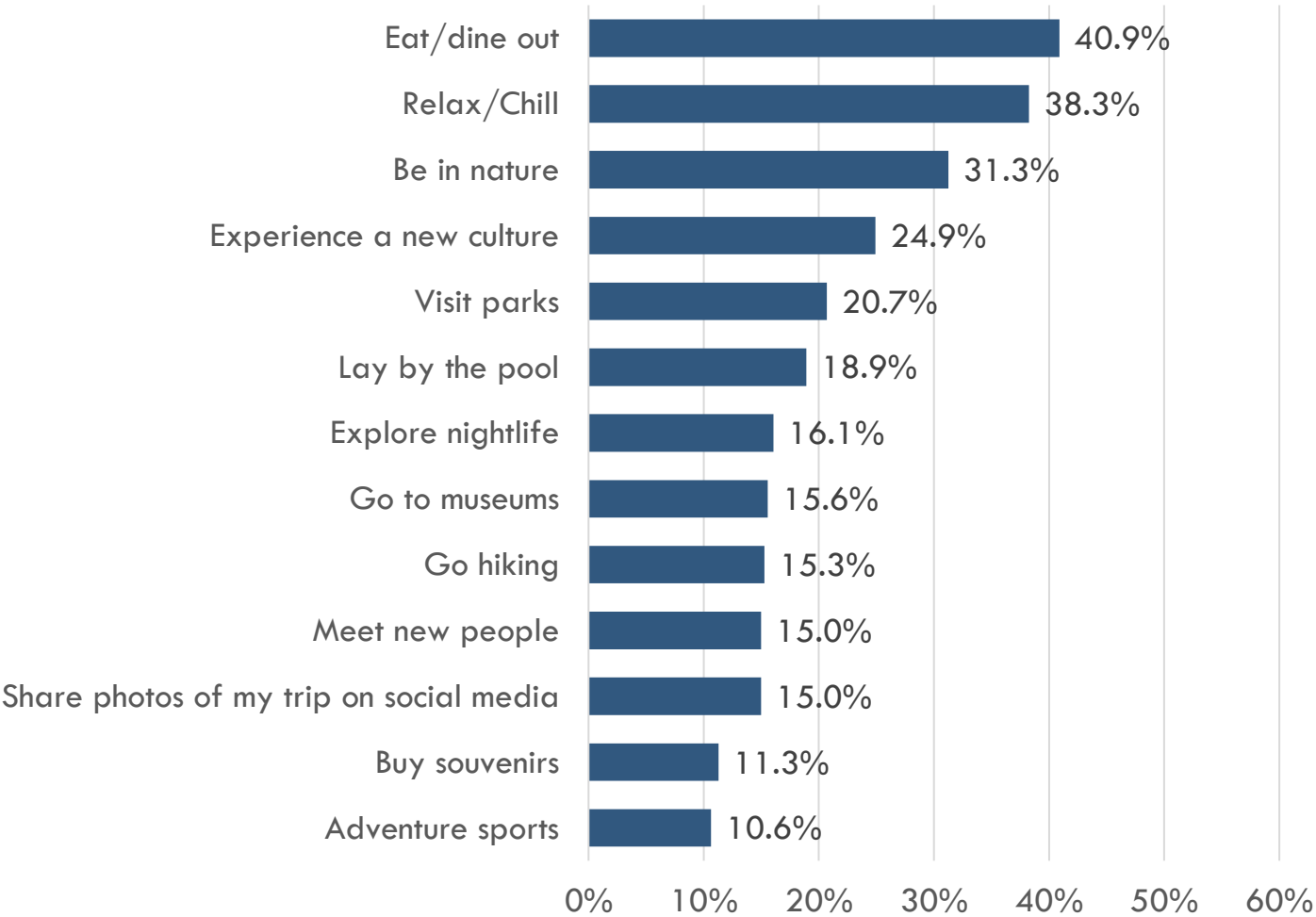
*"I have more anxiety about travel now,
How am I supposed to relax?"*

*"I look at active virus case counts and will
avoid high infection rate areas."*

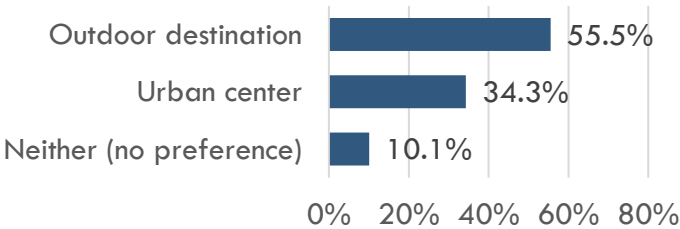
*"So many travel restrictions limit access to
the places I want to go. No Bali for me."*

-Self-Care Seeker

Favorite Things to Do on Vacation



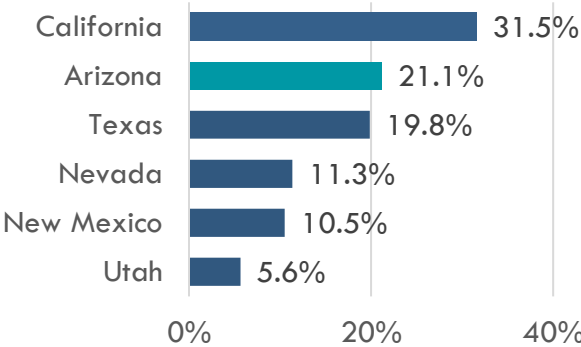
Preference for Outdoor Destination vs. Urban Center



Average Maximum Spend on Hotel Room

\$582.24

Desired Southwest Destinations to Visit



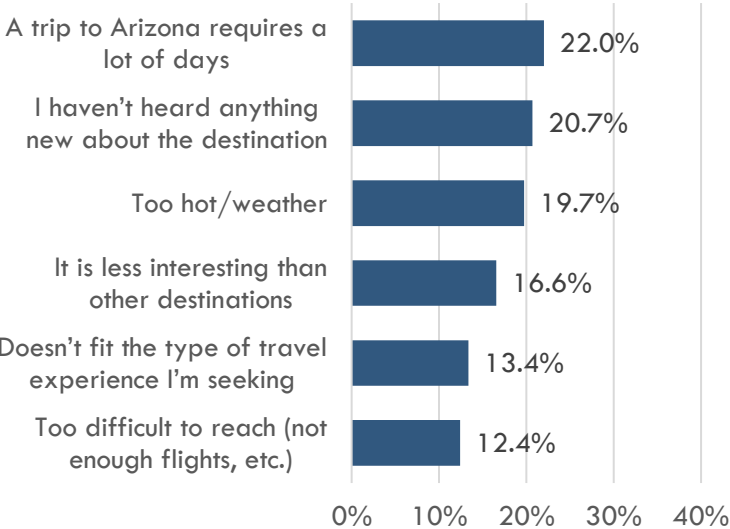
Familiarity with Arizona as a Place to Visit
(Top 3 Box Score—% selecting “slightly familiar,” “familiar,” or “extremely familiar”) **82.1%**



Visited Arizona in the Past 5 Years **54.6%**



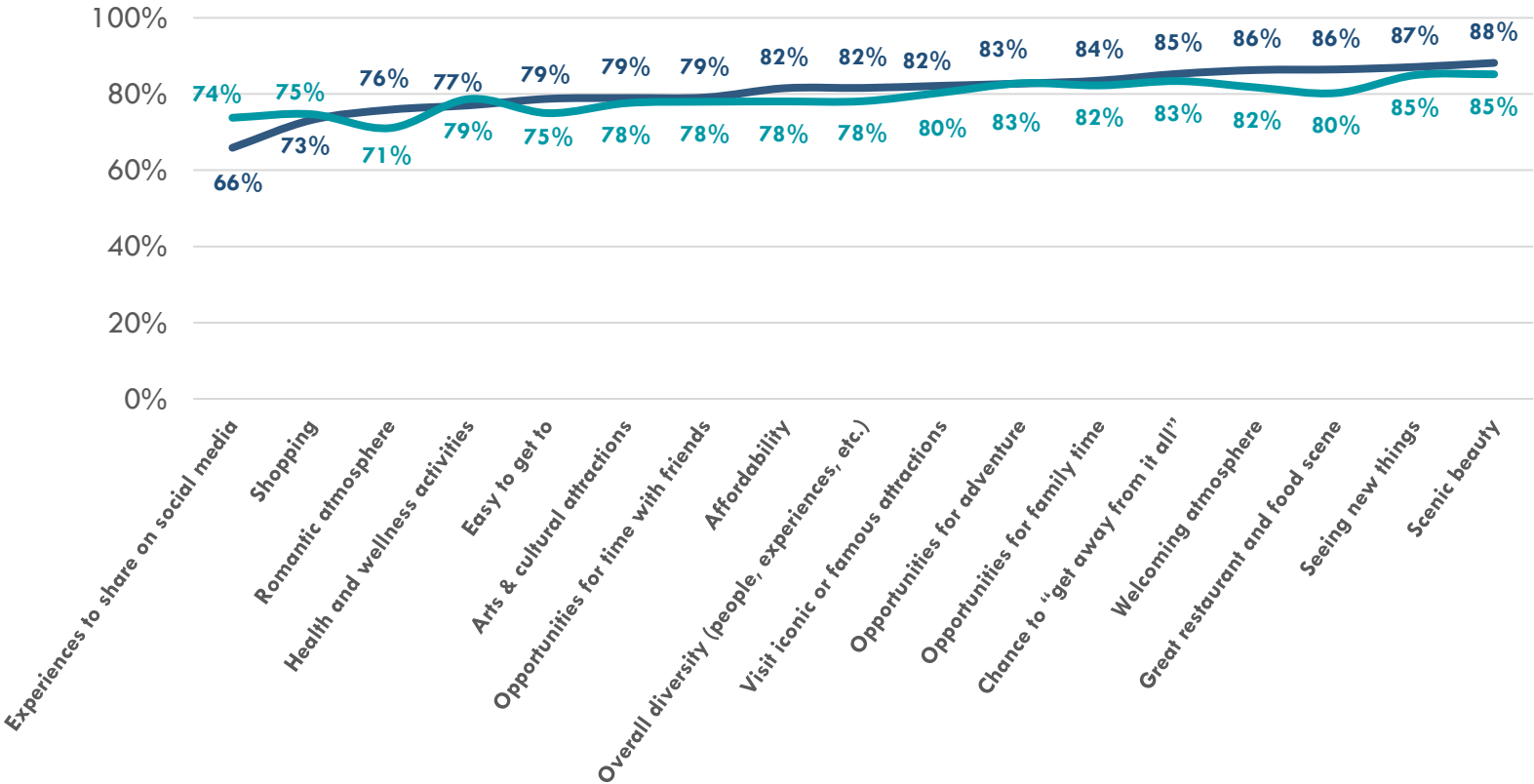
Top Reasons for Not Visiting Arizona in the Past 5 Years
(% of non-recent visitors)



Important Attributes for Destination Selection vs. Rating of Arizona's Attributes

(Top 2 Box Score of those who rated “Important” or “Extremely important” vs. Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)

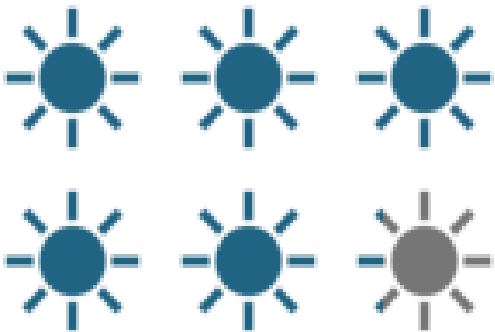
— “Important” or “Extremely important” to Destination Selection
— “Good” or “Very good” with Arizona



Place of Stay

4-star hotels or resorts	47.9%
5-star hotels or resorts	43.9%
3-star hotels	21.4%
Vacation home or other rental (i.e. Airbnb, VRBO or similar)	14.4%
Historic hotels	12.8%

Length of Stay



5.1 Days on Average

Travel Party

Spouse or significant other	67.6%
Children 12 and under	37.8%
Friend(s)	23.9%
Children 13-17	21.3%
Other family members	9.1%

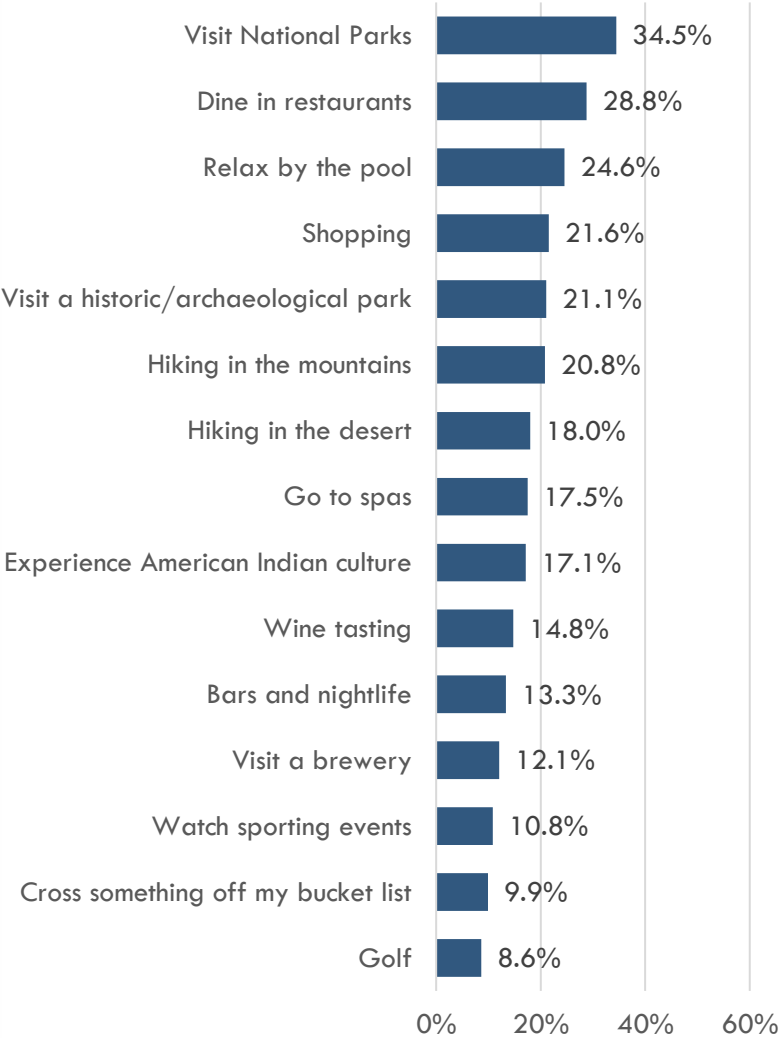
Average Daily Spending



\$561.66

Per Travel Party

Top Arizona Activities



MARKETING TO SELF-CARE SEEKERS

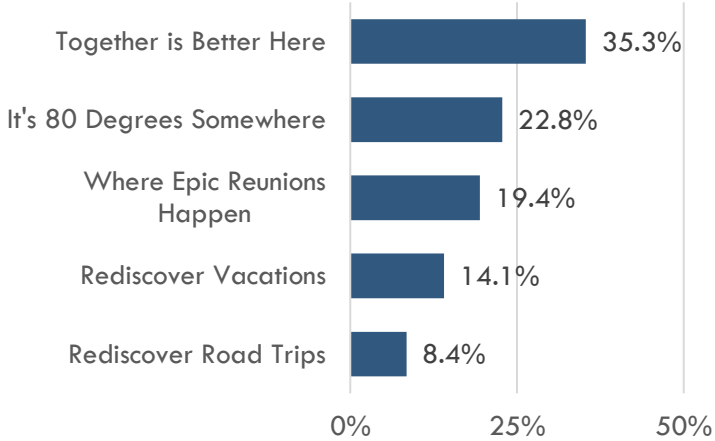
Although Arizona is an appealing destination to Self-Care Seekers, there are opportunities to boost awareness of spa experiences within the state. Self-Care Seekers already perceive Arizona to be an appealing destination for relaxation and self-care, but many did not immediately associate Arizona with spa experiences. The concept of traveling to Arizona and coming home rejuvenated is particularly attractive to this persona and more promotion of specific spa experiences would be well-received.

“That Arizona heat would feel nice during a massage outside, with a great view on the edge of a mountain. A very specialized and unique experience worth traveling for.”

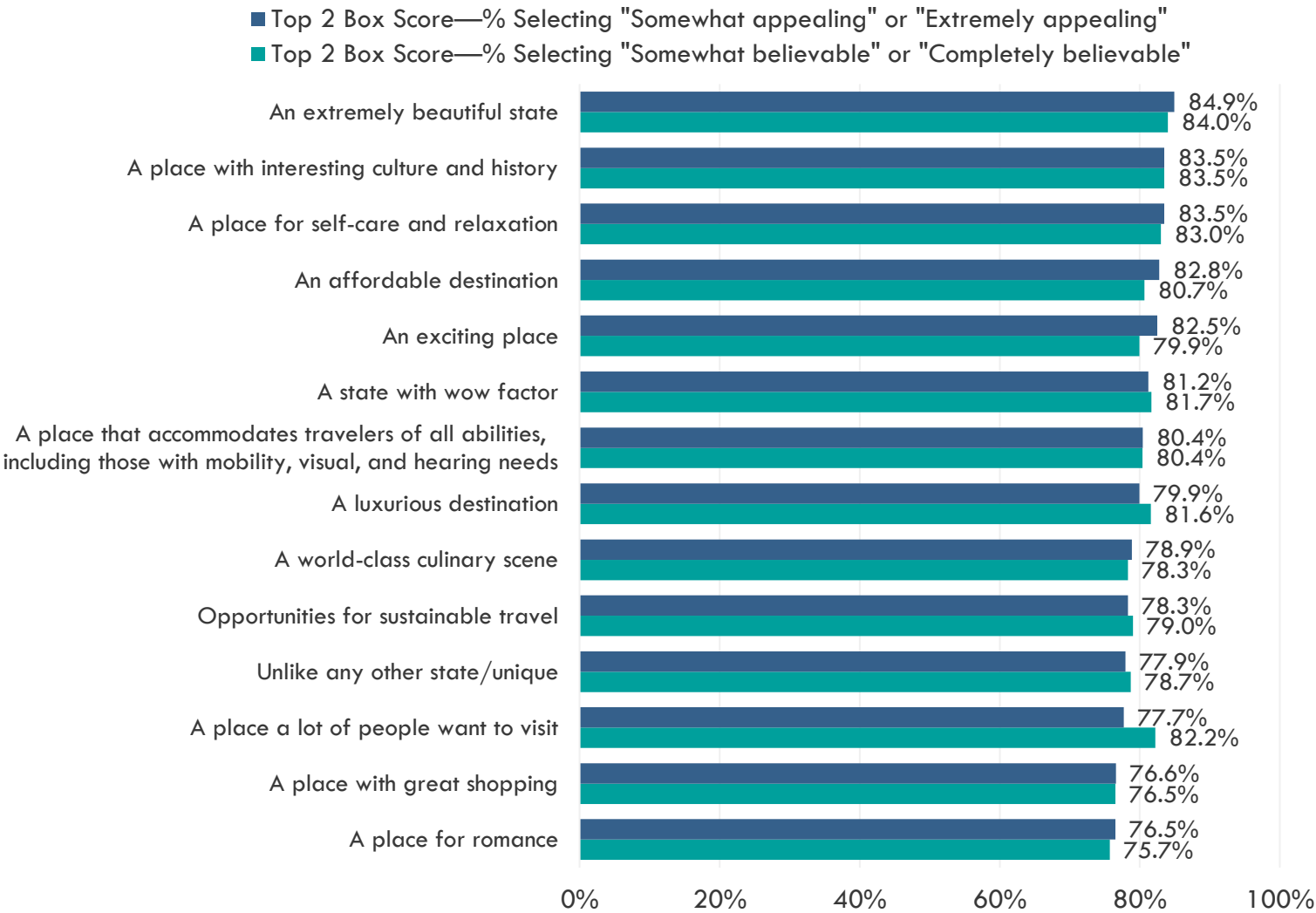
“I don’t normally think of Arizona for a spa day, but that would be really appealing.”

When marketing Arizona to Self-Care Seekers, it is important to communicate that the visitor experience will be high quality and stress-free. Self-Care Seekers crave stress relief in their travel activities and also in their travel planning, as some described wanting to arrive in Arizona without having to worry about the stress of planning. Messaging aimed at Self-Care Seekers should convey that a trip will allow them to relax and that the act of planning the trip will be stress-free.

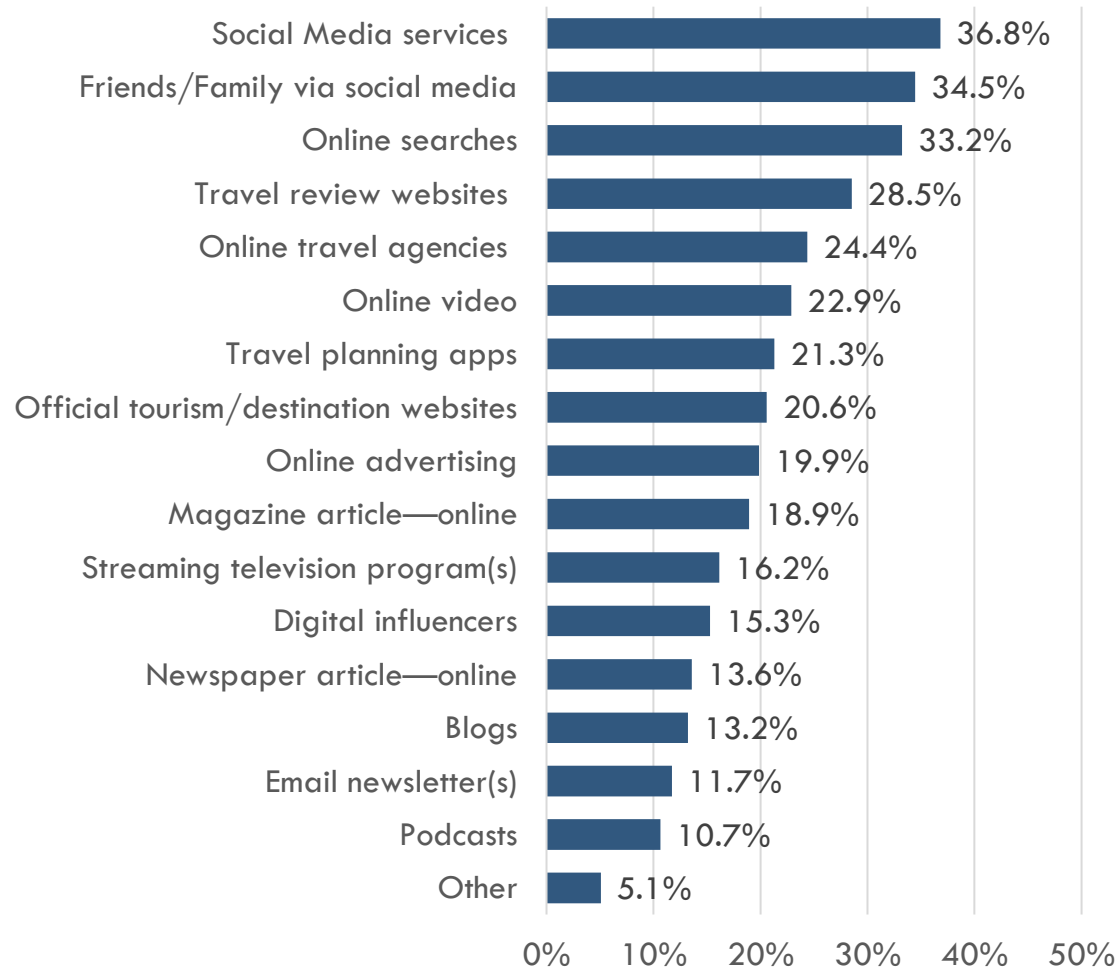
Most Appealing Arizona Positioning Statements



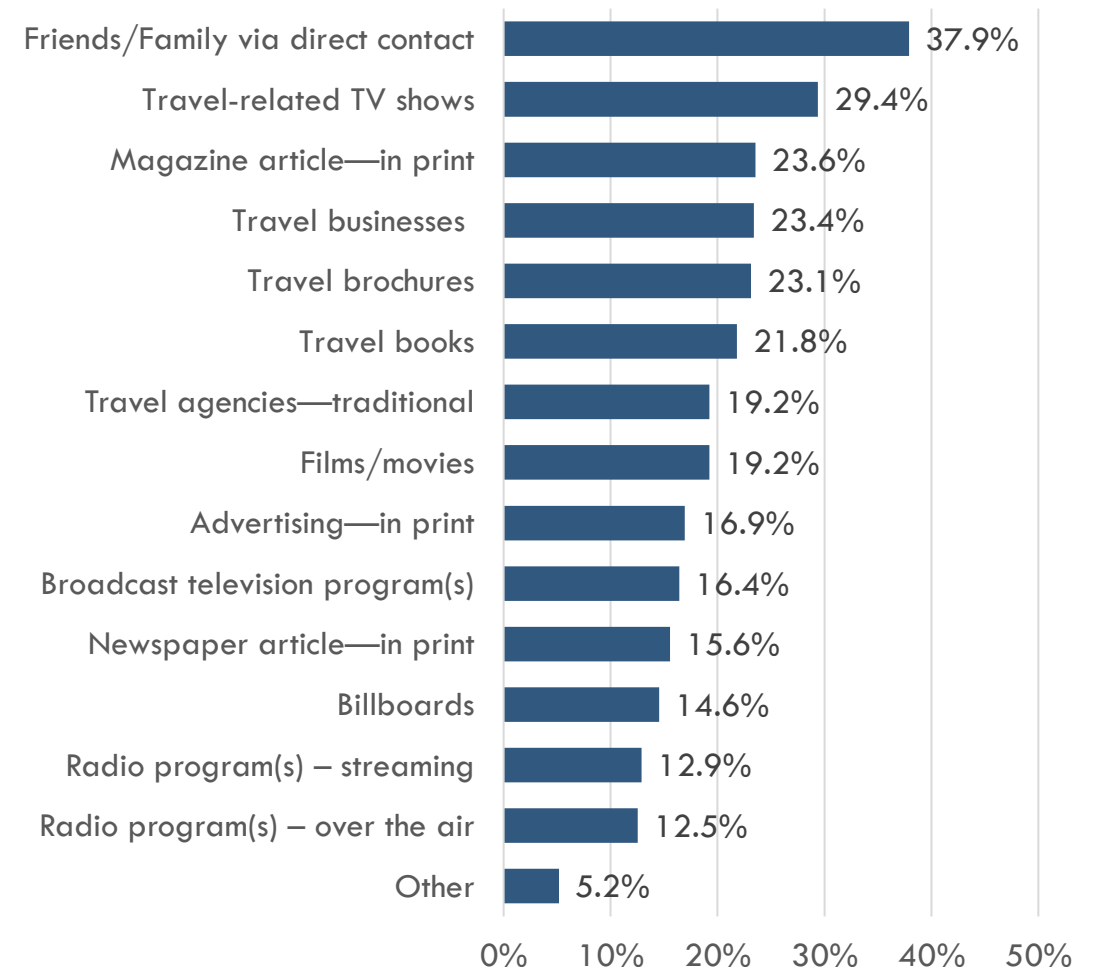
Most Appealing Arizona Statements vs. Most Believable Arizona Statements




Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration





*“If you don’t like beautiful
landscapes, warm weather, getting
outside and walking around and
exploring someplace amazing,
then don’t go to Arizona.”*

-Self-Care Seeker



WILD BUNCH

1,219 COMPLETED SURVEYS.

KEY TAKEAWAYS

How To Market To the Wild Bunch

- The Wild Bunch's primary motivation for travel is spending time together as a family unit outdoors, therefore family oriented outdoor experiences—particularly ones that are unique to Arizona—should be the anchor to any advertisements targeting this audience.
- Show the family dynamic in advertising, but do not make the focus kid-only attractions. This audience also seeks out experiences that cater to the parents' travel desires such as great dining, cultural activities and exploring a downtown setting.
- Position Arizona as a place for both adventure and relaxation. Current perceptions of the state amongst this group focus heavily on opportunities for relaxation while opportunities for adventure are not well known.
- Provide itineraries for Wild Bunch travelers to give them a better idea of the multi-faceted offerings of the state. This will also make travel planning easier for this group, which they will appreciate.



WILD BUNCH

1,219 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all Wild Bunch.

KEY CHARACTERISTICS

Characteristics (Wild Bunch):

- The youngest persona (39.0), they are similar in affluence to Self-Care Seekers and Foodies (\$127,685 average household income). All have children. They take an average number of trips (3.0 leisure trips in past year; 4.2 trips planned next two years).

Messaging:

- They place near center of the personas for familiarity with Arizona (80.7%) and visiting within the past five years (51.4%). Of six desirable Southwestern destinations, Arizona ranks second (22.9%) after California (31.8%), and is solidly ahead of third place Texas (18.9%).
- A focus on nature should attract them since their top favorite vacation activity is being in nature (40.9%), more than any other persona and surpassing dining (37.5%) and relaxing (40.0%), the top two for average leisure travelers. They are more than twice as likely to prefer outdoor destinations (65.4%) to urban centers (25.8%).
- Very family-oriented, they uniquely place opportunities for family time as the most important feature of a vacation destination (91.7%). Like average travelers, their largest negative gap occurs on affordability (86.2% important; 73.7% rating), but they also feel Arizona could improve on being welcoming (88.7%; 80.4%) as well as family time (91.7%; 84.2%).
- Arizona's appealing statements and believability link closely, so promoting it as an extremely beautiful (87.9% appealing), interesting (85.1%), and exciting (84.3%) state works. Like Natural History Lovers and Self-Care Seekers, they appreciate a "wow" factor (82.2%).
- While National Parks entice the largest share of Wild Bunch tourists (42.9%), they expect to be very active on an Arizona trip, with hiking in the mountains (24.9%) and desert (20.8%) leading every other persona.
- Far more than any other deterrent, they consider an Arizona trip time-consuming (31.9%). The leading positioning statement they select highlights their family orientation, "Together is Better Here" (33.3%).
- To reach them digitally, social media services (41.4%) top the list, followed by friends/family via social media (36.3%). Those push online searches, the top digital source of average travelers, to third place.



Gender

Female: 47.1%
Male: 52.0%
Non-binary/Transgender: 0.9%



Marital Status

Married/partnered: 86.0%
Single: 9.0%
Children under 18: 100.0%



Average Age: 39.0

Millennial or younger: 60.5%
Gen X: 34.8%
Boomer or older: 4.7%



Ethnicity

Caucasian: 77.7%
Non-Caucasian: 22.3%



Household Income

\$127,685



Physical, Visual, Auditory or Cognitive Disability

Disability: 18.4%



Top MSAs

Los Angeles-Long Beach, CA	6.7%	Orlando, FL	3.5%
New York, NY-NJ	5.6%	Dallas-Fort Worth, TX	2.9%
Chicago, IL	4.2%	Houston, TX/San Francisco-Oakland, CA	2.7%



Average number of
leisure trips in
the **past twelve months**



Average number of
expected leisure trips
in the **next two years**

TRAVELER PROFILE – WILD BUNCH

While Wild Bunch travelers primarily like to engage in outdoor recreational opportunities with their younger children on their trips, they also seek out other experiences that provide opportunities for relaxation in addition to adventure. Immersing themselves in cultural activities is also an important consideration as it provides learning opportunities to their children. In addition, while family friendly destinations are important, this persona isn't necessarily looking for kid-centered destinations. Instead, places that can provide a more multi-faceted travel experience in a safe environment would be of most interest to this group.

Ease and convenience can not be discounted with this persona. As traveling with children adds another layer of complexity to their travel logistics, Wild Bunch travelers strongly consider the ease of access in each leg of their journey (e.g., flying into a destination, traveling from the airport to their hotel, etc.) when deciding on places to visit.

“When picking places to travel to I consider kid friendly locations, but I am not necessarily looking for kid centered locations.”

“Ease and convenience are important. Ease of getting to the destination. Ease of traveling from the airport to our hotel are things I consider.”

TRAVELER PROFILE – WILD BUNCH



The types of outdoor recreational activities Wild Bunch travelers have engaged in with their families previously are also varied and have included:

- Biking
- Guided outdoor tours
- Long Hikes
- Safari
- Water Sports (snorkeling, scuba diving, parasailing)
- Wildlife viewing
- Ziplining

Guided tours/excursions were called-out in particular because they provide the opportunity for exploration in a safe environment without requiring intensive logistical planning.

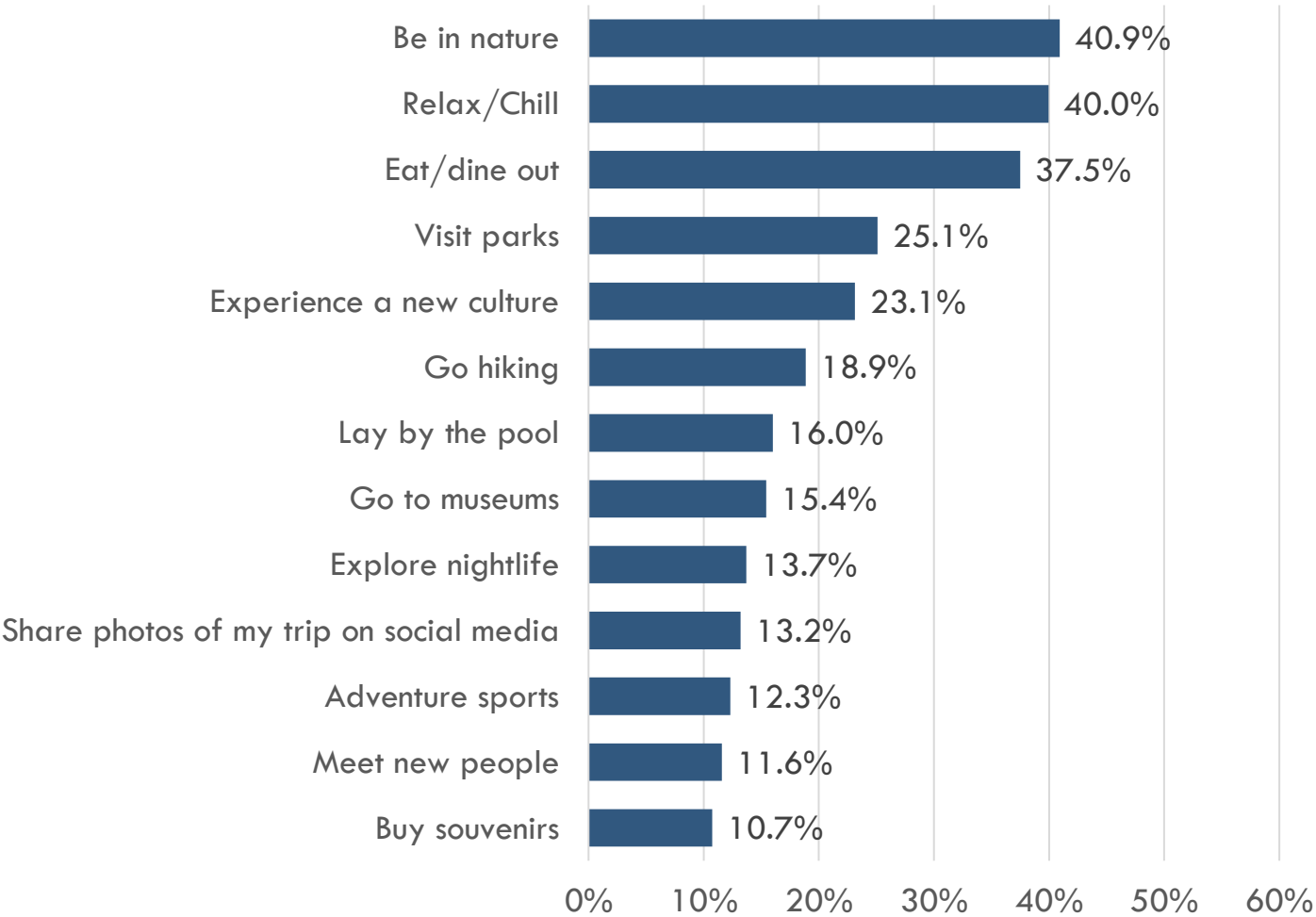
Additionally, this persona is turned off by remote all-inclusive resorts because they are considered limiting and do not allow this group to properly explore the destination with their families.

*“My ideal trip with the kids
includes both relaxation
and adventure, and a whole
lot of good food.”*

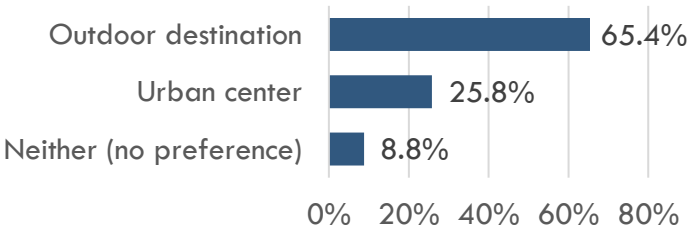
- Wild Bunch



Favorite Things to Do on Vacation



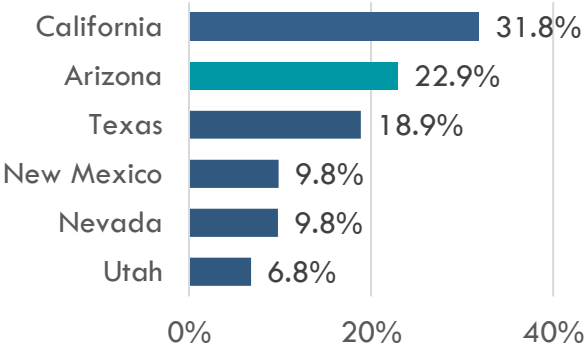
Preference for Outdoor Destination
vs. Urban Center



Average Maximum Spend
on Hotel Room

\$535.96

Desired Southwest Destinations to Visit



*“We want our family with us,
but we also want to do adult
things—experiences that my
husband and I will enjoy, not
just kid centered things.”*

-Wild Bunch



TRIP PLANNING – WILD BUNCH

“We have had to cancel few vacations during covid, but we’ve also traveled during the pandemic. There is no ideal destination for covid travel, but I am not thinking of exotic destinations like, Indonesia and Singapore.”

“Traveling is more complicated with COVID so staying local [within the U.S.] is a bonus.”

Children do have an influence on Wild Bunch’s travel planning. While they don’t necessarily dictate vacation destination choices, they do influence timing and duration of trips due to school schedules and can also affect in-market decisions such as restaurant/dining selections (e.g., picky eaters).

As far as COVID’s impact on traveling, this group is continuing to avoid international destinations, marking an increased opportunity for Arizona to attract this persona to the state now. In addition, they are diligent about researching which destinations are being more severely affected by the virus (e.g., high case counts) and are also *“avoiding these locations.”*

Like other traveler segments, Wild Bunch primarily gets their travel inspiration from word of mouth, either in-person or via friends/family social media. In addition, hotel websites, travel magazines, TripAdvisor and general internet searches are also information sources they research when selecting a travel destination.

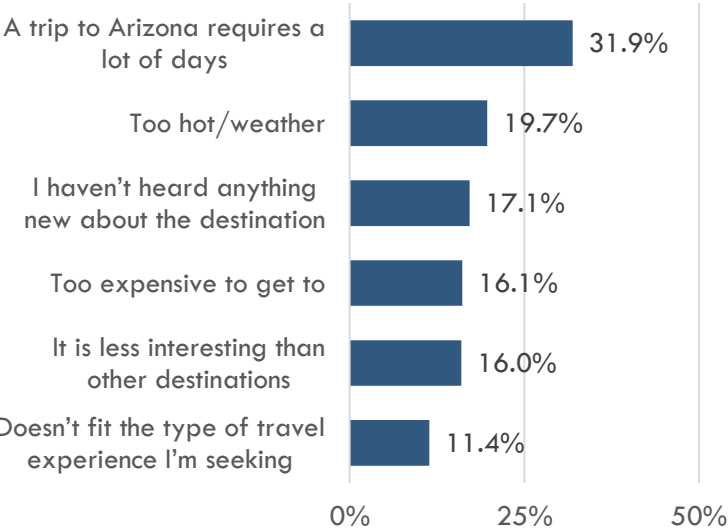
Familiarity with Arizona as a Place to Visit
(Top 3 Box Score—% selecting “slightly familiar,”
“familiar,” or “extremely familiar”) **80.7%**



Visited Arizona in the Past 5 Years **51.4%**

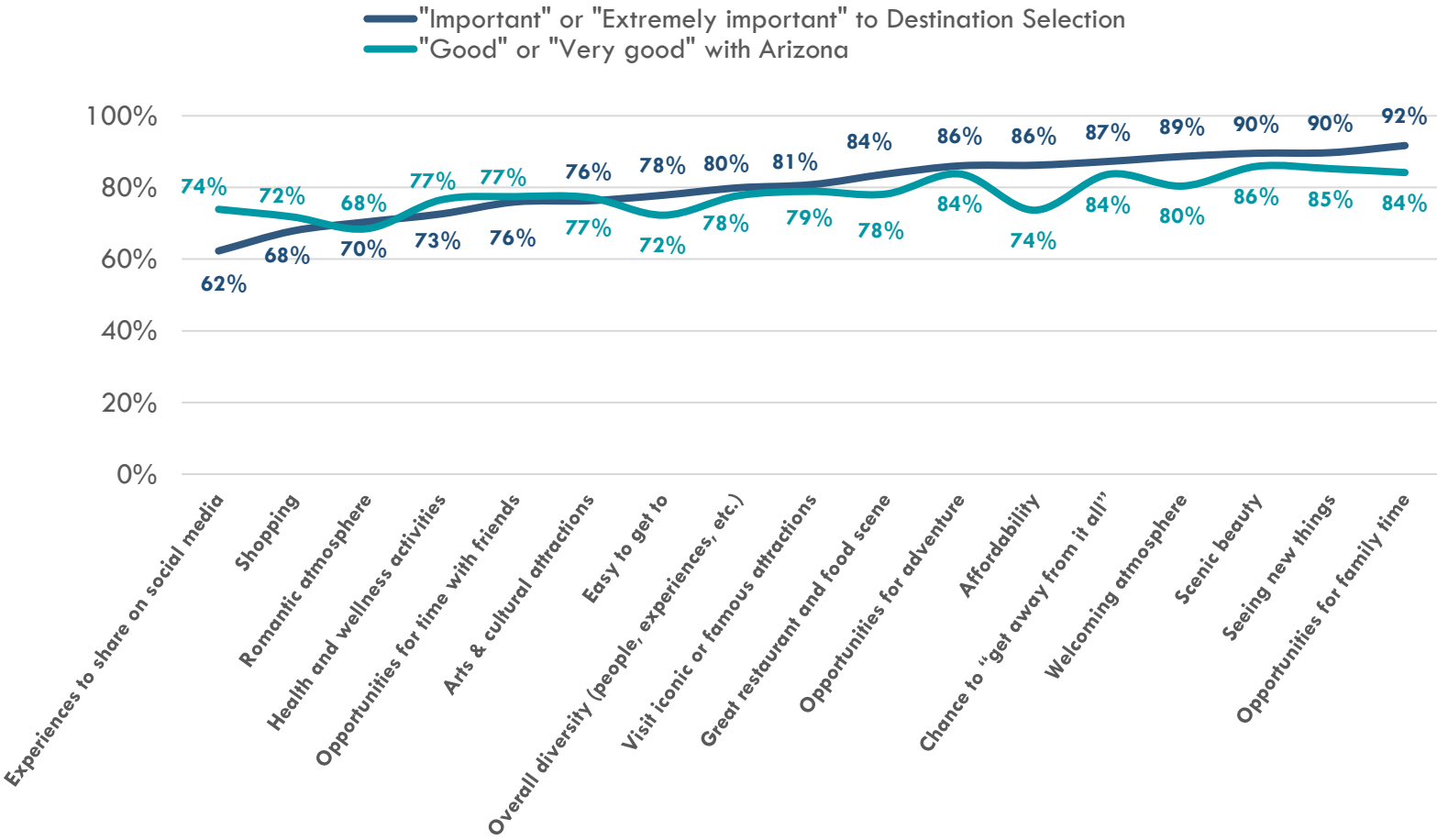


**Top Reasons for
Not Visiting Arizona in the Past 5 Years**
(% of non-recent visitors)



**Important Attributes for Destination Selection vs.
Rating of Arizona's Attributes**

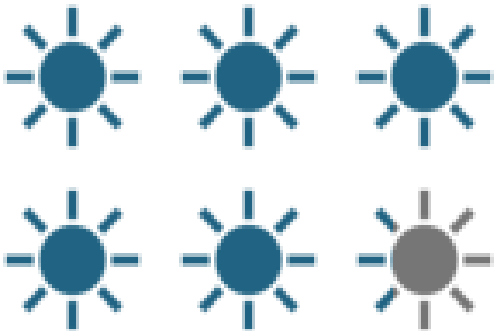
(Top 2 Box Score of those who rated “Important” or “Extremely important” vs.
Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)



Place of Stay

4-star hotels or resorts	45.5%
5-star hotels or resorts	39.7%
3-star hotels	25.3%
Vacation home or other rental (i.e. Airbnb, VRBO or similar)	17.4%
Historic hotels	13.2%

Length of Stay



5.2 Days on Average

Travel Party

Spouse or significant other	76.7%
Children 12 and under	54.7%
Children 13-17	31.7%
Friend(s)	18.2%
Parents or parents in-law	7.3%

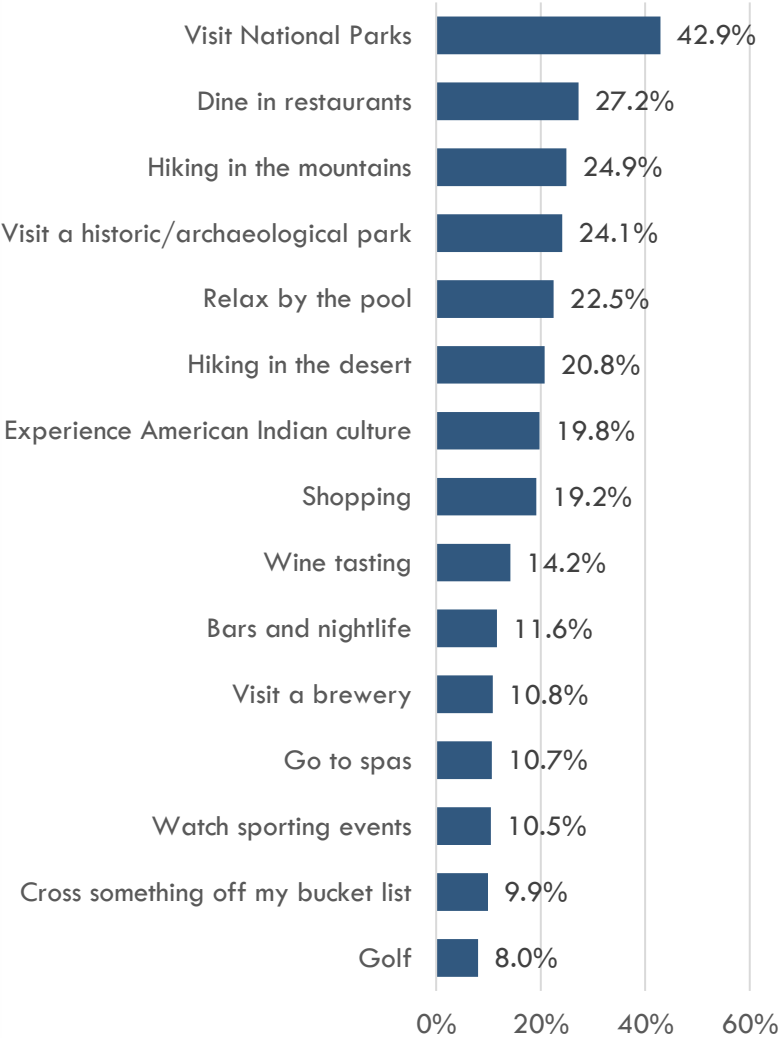
Average Daily Spending



\$549.76

Per Travel Party

Top Arizona Activities



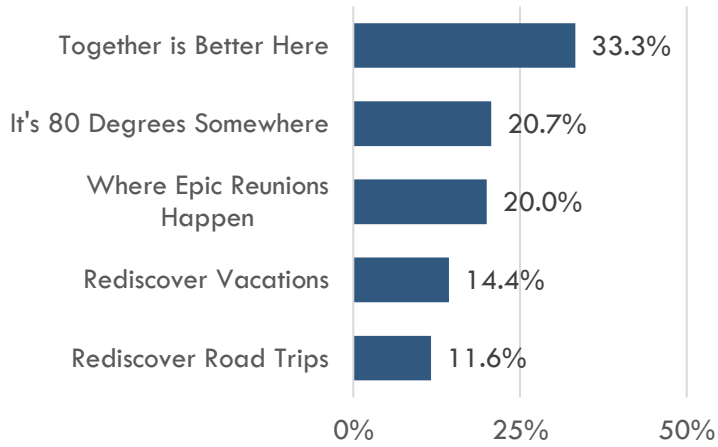
MARKETING TO WILD BUNCH

Marketing to Arizona's high value personas should address each persona's primary motivations for travel. Communicating how Arizona can deliver on these motivations will be key to increasing their consideration of the destination for a future trip.

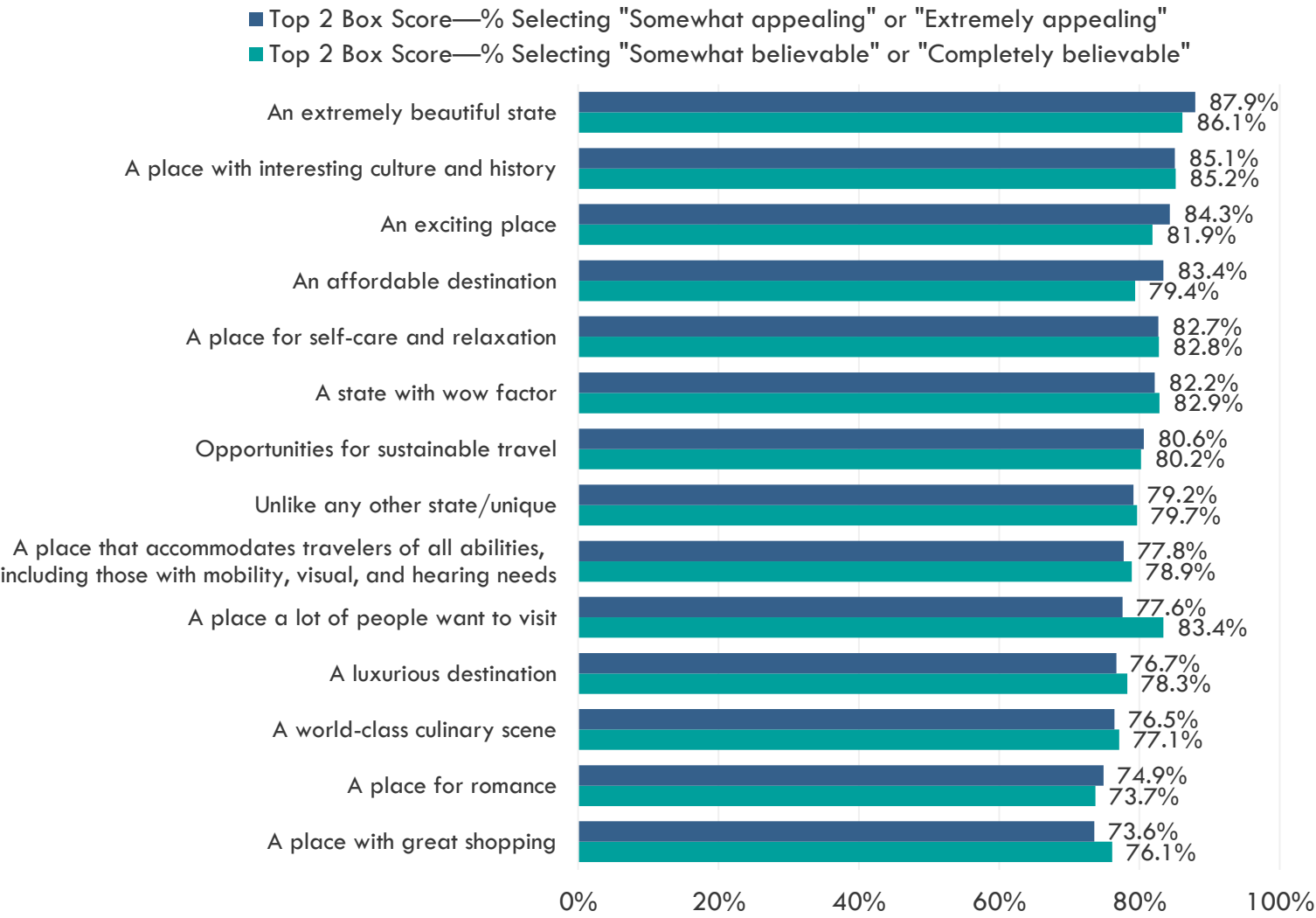
The Wild Bunch's primary motivation for travel is spending time together as a family unit outdoors, therefore family oriented outdoor experiences—particularly ones that are unique to the destination—should be the anchor to any advertisements targeting this audience. Highlighting the unique opportunities for family-fun outdoor adventure, paired with a diverse set of other experiences such as great dining, cultural activities and exploring a downtown setting will capture this audience's attention.

“Arizona doesn’t feel like a place for a family vacation. There isn’t a whole bunch of adventure activities for the family, it’s more like couples retreat or a retirement place. I can’t imagine going with my daughters there, since there are only relaxing things to do.”

Most Appealing Arizona
Positioning Statements



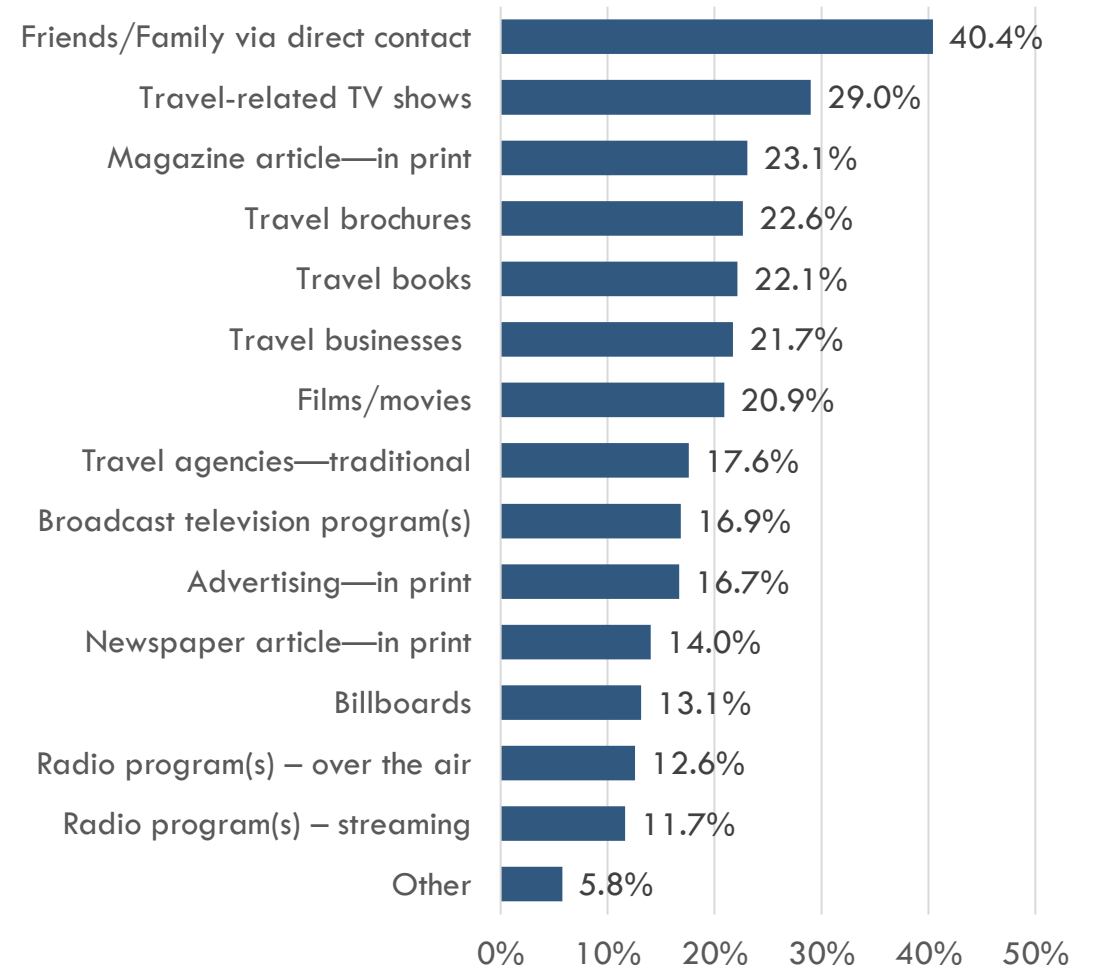
Most Appealing Arizona Statements vs. Most Believable Arizona Statements



Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration



“Arizona is not a holiday destination known to me, so I’d have to choose it for particular reason. I’d want the trip to be creative and adventurous.”

-Wild Bunch



FOODIES WITHOUT PRETENSE

2,432 COMPLETED SURVEYS.

KEY TAKEAWAYS

How to Market to Foodies Without Pretense

- Unsurprisingly, Foodies Without Pretense said that a destination's local food scene is important to how they select destinations to visit. However, this audience's familiarity with Arizona's food experiences is low and centers around an assumption that Mexican/Latin cuisine prevails in the state. Since this audience seeks out variety in their travel food experiences, more needs to be done to educate this group about Arizona's other cuisines and food-related offerings.
- In addition to food, when asked what was most important to them when they travel, this group also mentioned cleanliness, good service, safety, affordability and weather. Like other traveler personas, Foodies Without Pretense also seek out unique/local experiences. Approachable outdoor experiences (e.g., day hikes and scenic drives) are also desired by this audience.
- Travelers listed Instagram and YouTube as the best way for Arizona reach them to motivate them to visit. Yelp and Google Maps were also mentioned as key planning resources for finding food experiences when traveling.

FOODIES WITHOUT PRETENSE

2,432 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all Foodies without Pretense.

KEY CHARACTERISTICS

Characteristics (Foodies Without Pretense):

- Averaging 45.5 years in age, only Luxury Travelers are older, but they are near the Wild Bunch and Self-Care Seekers in income (\$129,046). Half (52.1%) have children at home. They take a slightly above average number of trips (3.0 leisure trips in past year; 4.6 trips planned next two years).

Messaging:

- They trail other personas on familiarity with Arizona (75.0%) and visitation in the past five years (43.3%). Of six desirable Southwestern destinations, Arizona challenges (25.2%) California's (27.1%), top rank and is solidly ahead of third place Texas (16.3%).
- Cuisine-oriented, they lead all personas in placing eat/dine out as their top favorite thing to do on vacation (52.4%). Further, on a trip to Arizona, they, more than any other persona except Luxury Travelers, want to dine in restaurants (34.1%). Interestingly, more of them (and Natural History Lovers) also want to visit an Arizona historic/archaeological park (26.2%). One the other hand, only the Wild Bunch is less interested in urban centers (28.5%).
- Rather typical of other travelers, scenic beauty (87.9%), seeing new things (87.7%), and welcoming (86.8%), as well as cuisine (86.1%) top their list of important destination features. However, they note a substantial negative gap on two of those for Arizona: welcoming atmosphere (86.8% important; 73.3% rating) and cuisine (86.1% important; 71.8% rating). Affordability lags also, but is not quite as important.
- Arizona's appealing statements and believability match, so promoting it as an extremely beautiful state (84.0% appealing) with an interesting culture/history (81.8%) works.
- The top two deterrents are that a trip is time-consuming (28.7%) or too hot/weather (23.8%). They point to "Together is Better Here" (28.4%) and "It's 80 Degrees Somewhere" (26.8%) as leading positioning statements, with the latter helping to mitigate the weather complaint.
- To reach them digitally, online searches (39.9%) tops the list, followed by friends/family via social media (34.7%) and social media services (32.5%).

FOODIES WITHOUT PRETENSE



Gender

Female: 49.6%
Male: 49.5%
Non-binary/Transgender: 0.9%



Marital Status

Married/partnered: 73.9%
Single: 19.7%
Children under 18: 52.1%



Average Age: 45.5

Millennial or younger: 47.0%
Gen X: 26.9%
Boomer or older: 26.1%



Ethnicity

Caucasian: 75.8%
Non-Caucasian: 24.2%



Household Income

\$129,046



Physical, Visual, Auditory or Cognitive Disability

Disability: 17.4%



Top MSAs

Los Angeles-Long Beach, CA	5.7%	Orlando, FL	2.7%
New York, NY-NJ	4.7%	San Francisco-Oakland, CA	2.7%
Chicago, IL	3.9%	Philadelphia, PA-NJ	2.4%



**Average number of
leisure trips in
the past twelve months**



**Average number of
expected leisure trips
in the next two years**

TRAVELER PROFILE – FOODIES WITHOUT PRETENSE

“Food is the #1 factor!”

“As soon as I know where I am going, I start planning where will I stay and where will I eat.”

“I like stimulus and beautiful places where I can enjoy tasting a variety of new things.”

Unsurprisingly, Foodies Without Pretense said that a destination’s local food scene plays a large part in their leisure trips, particularly food experiences with a variety of options and good reviews. In addition to food, when asked what was most important to them when they travel, this group also mentioned cleanliness, good service, safety, affordability and weather. Similar to other traveler personas, Foodies Without Pretense also seek out unique/local experiences. Approachable outdoor experiences (e.g., day hikes and scenic drives) are also desired by this audience.

Word of mouth recommendations and online research are the top sources of destination inspiration for this group. Word of mouth through friends/family and Instagram were the top ways these travelers learned about new places they would like to visit. Yelp and Google Maps were also mentioned as key planning resources for finding food experiences when traveling.

TRAVELER PROFILE – FOODIES WITHOUT PRETENSE

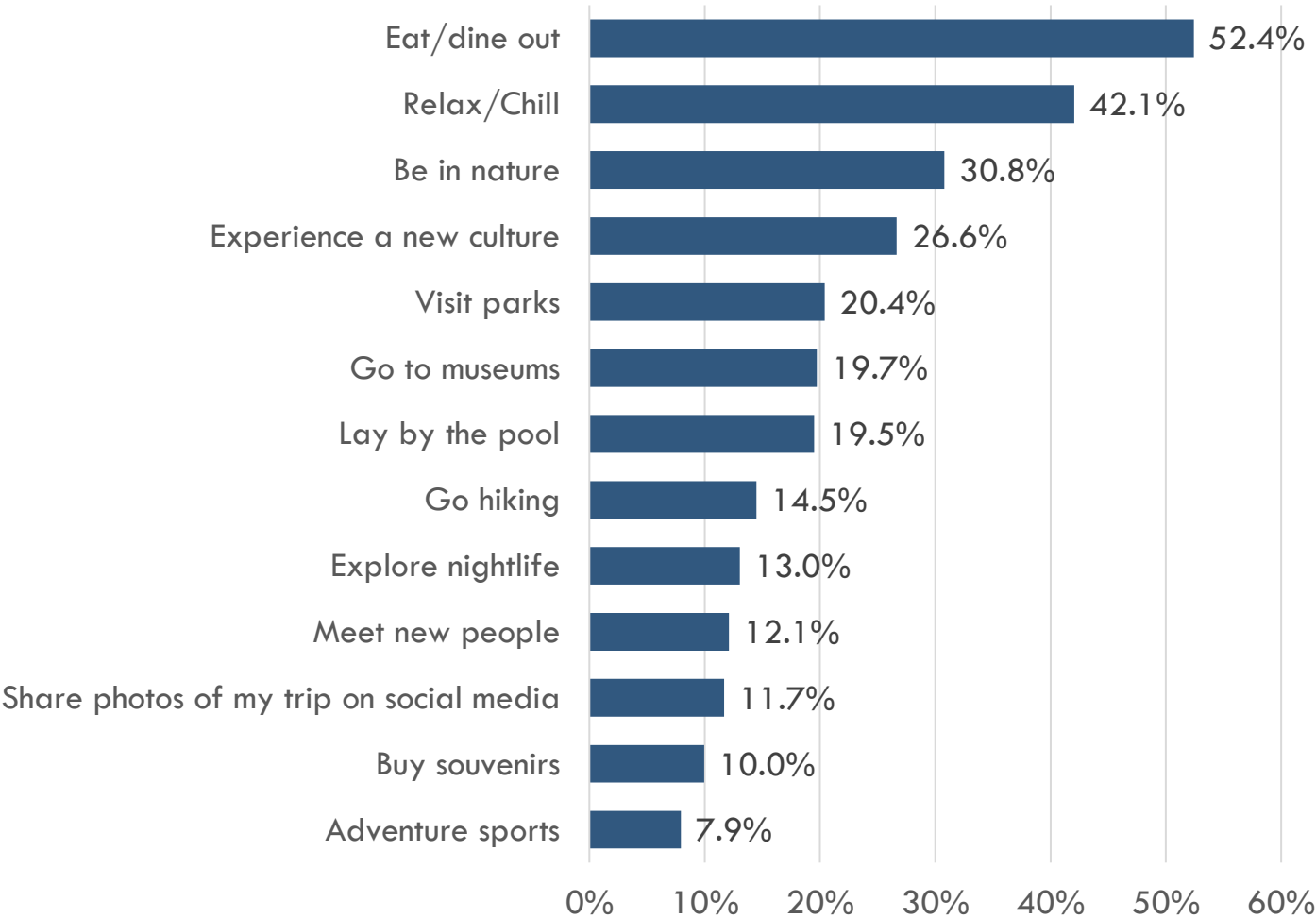
“I want to avoid places that have lots of people in small spaces, but I do feel safe on a plane because of the air filtration. I also want to be prudent and will wear masks when needed. I am also more outdoor-focused.”

“I am more comfortable going to locations where COVID test are required.”

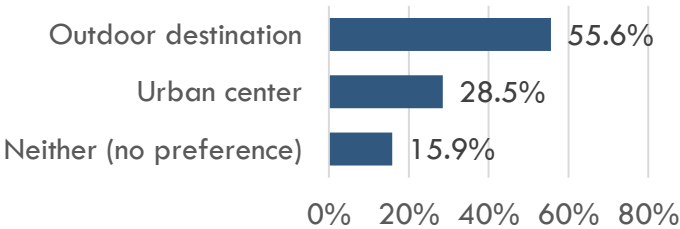
The current coronavirus situation has greatly impacted travel planning, as well as travel destinations and frequency.

Most participants shared that their travel behaviors have changed as a result of the COVID-19 pandemic. This audience most often mentioned prioritizing outdoor or uncrowded destinations and are prudent about adhering to covid safety protocols.

Favorite Things to Do on Vacation



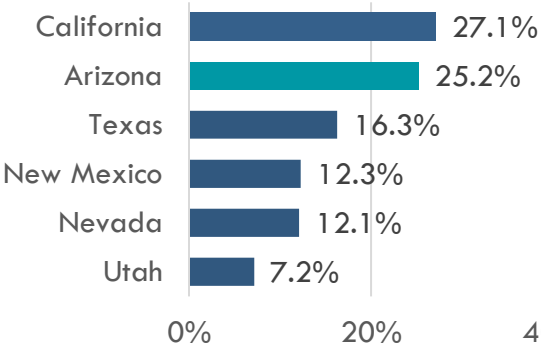
Preference for Outdoor Destination vs. Urban Center



Average Maximum Spend on Hotel Room

\$471.22

Desired Southwest Destinations to Visit



“I like learning new things and I like seeing new things. I also like to be active while enjoying modern comforts and, of course, eat and drink something a little indulgent when I’m traveling.”

-Foodies Without Pretense

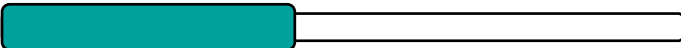


Familiarity with Arizona as a Place to Visit

(Top 3 Box Score—% selecting “slightly familiar,” “familiar,” or “extremely familiar”) **75.0%**

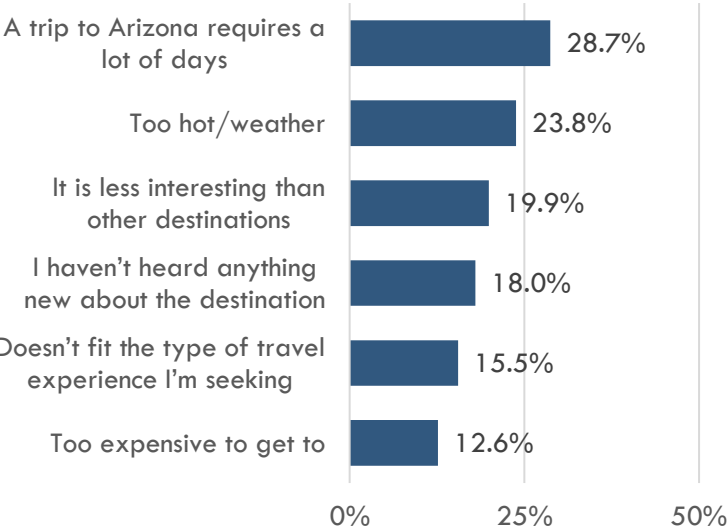


Visited Arizona in the Past 5 Years **43.3%**



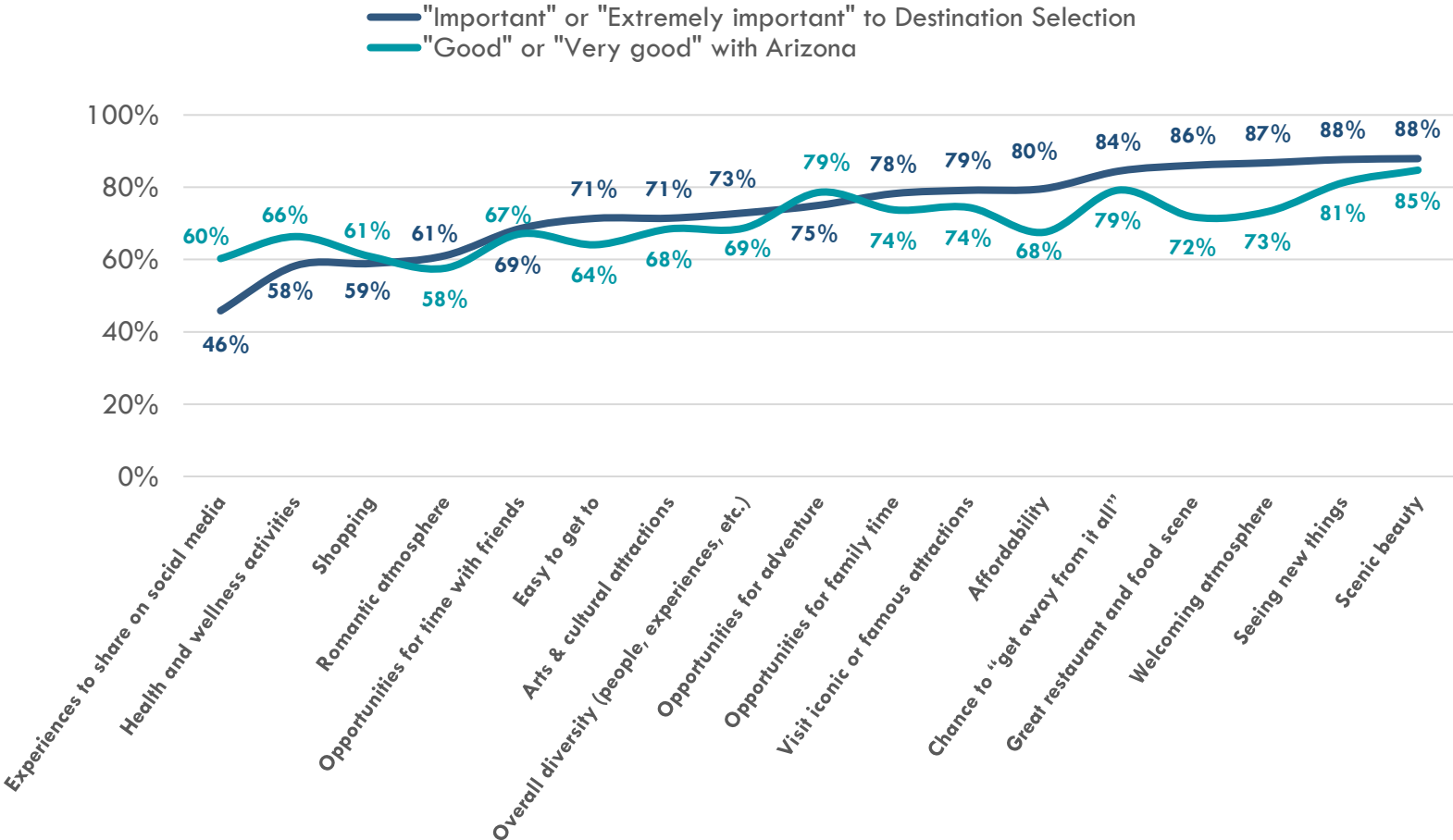
Top Reasons for Not Visiting Arizona in the Past 5 Years

(% of non-recent visitors)



Important Attributes for Destination Selection vs. Rating of Arizona's Attributes

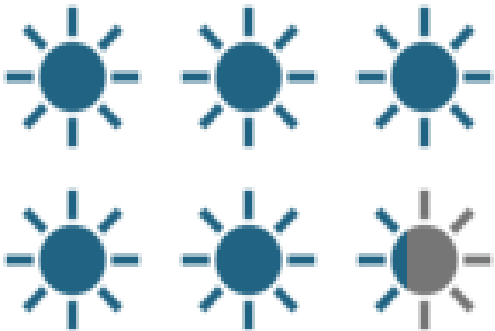
(Top 2 Box Score of those who rated “Important” or “Extremely important” vs. Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)



Place of Stay

4-star hotels or resorts	48.3%
5-star hotels or resorts	34.4%
3-star hotels	26.0%
Vacation home or other rental (i.e. Airbnb, VRBO or similar)	19.1%
Historic hotels	12.9%

Length of Stay



5.3 Days on Average

Travel Party

Spouse or significant other	73.2%
Children 12 and under	28.7%
Friend(s)	20.4%
Children 13-17	17.4%
Other family members	10.8%

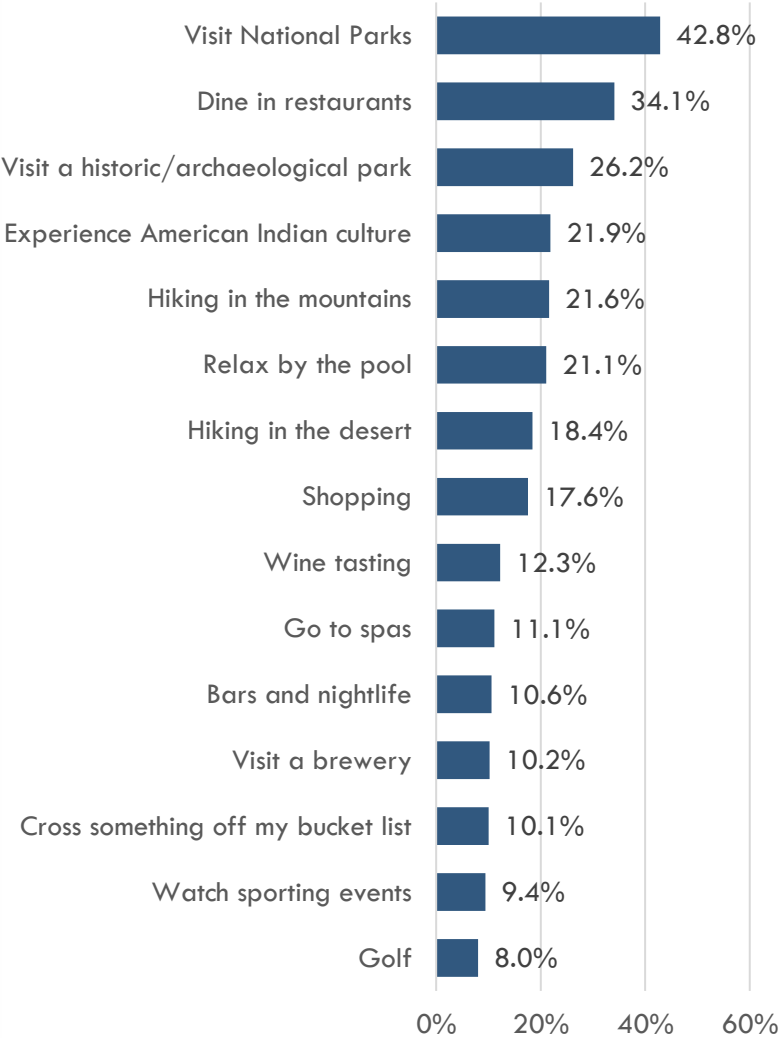
Average Daily Spending



\$502.58

Per Travel Party

Top Arizona Activities



MARKETING ARIZONA – FOODIES WITHOUT PRETENSE

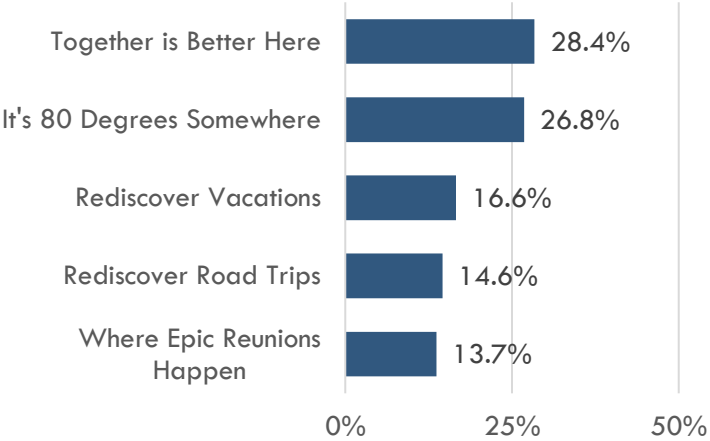
When asked what they know about Arizona's food culture, respondents mentioned being largely unfamiliar but assumed Mexican/Latin cuisine like tacos were prevalent. Fusion cuisine like TexMex was also mentioned. Since this audience seeks out variety in their travel food experiences, more needs to be done to educate this group about Arizona's other cuisines and food-related offerings.

Aside from food, Foodies Without Pretense would be most excited to explore Native American history and experience nature with activities like hiking if visiting Arizona. When asked what would convince them to visit Arizona, respondents mentioned advertising a variety of food types and outdoor activities with beautiful scenery.

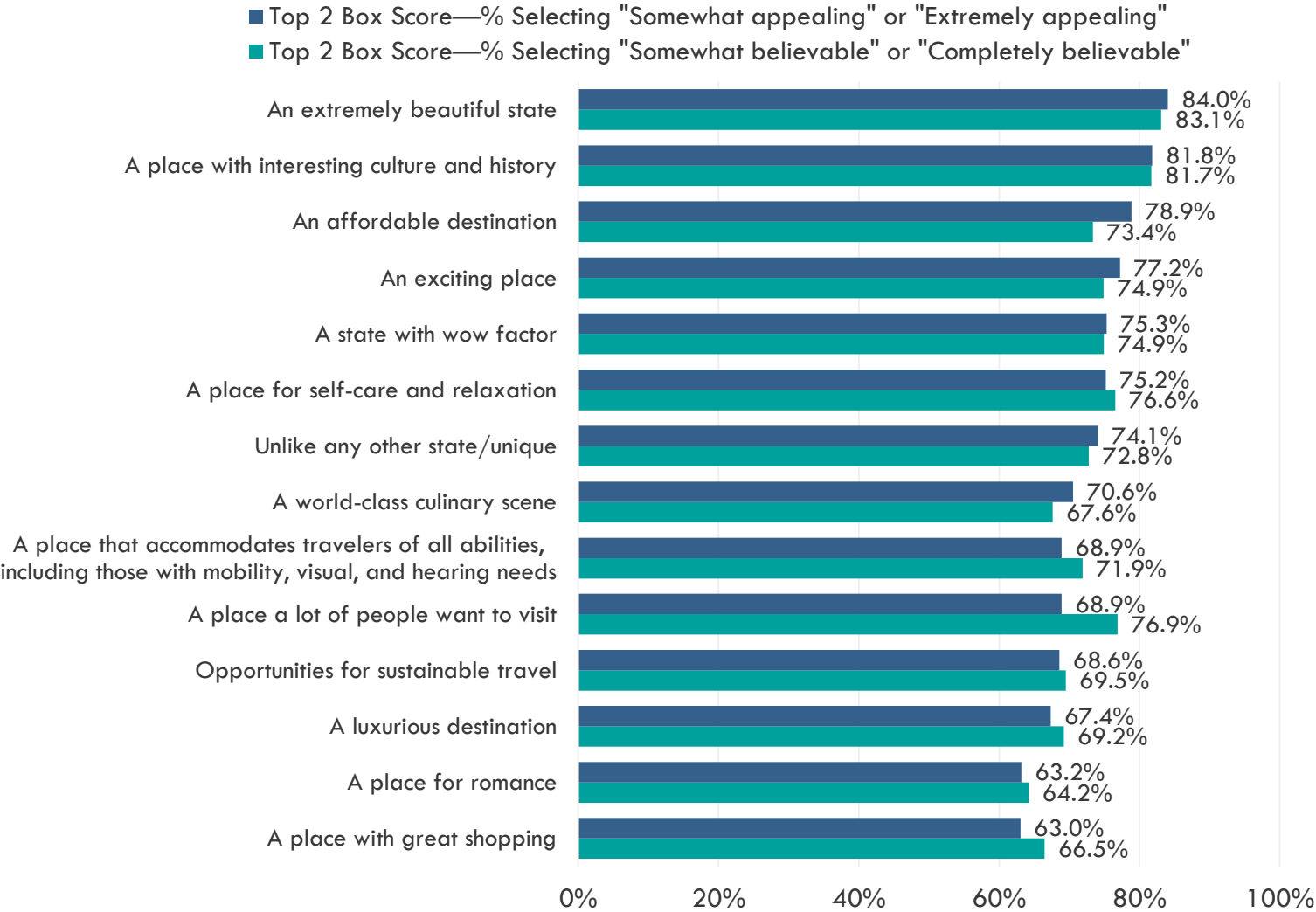
“I love Broad ranging ethnic cuisines, wide variety of food types. I love fine wines, but I don't think Arizona is known for having any wine.”

“The best travel experiences are experiences specific to the area that I can't get anywhere else.”

Most Appealing Arizona Positioning Statements



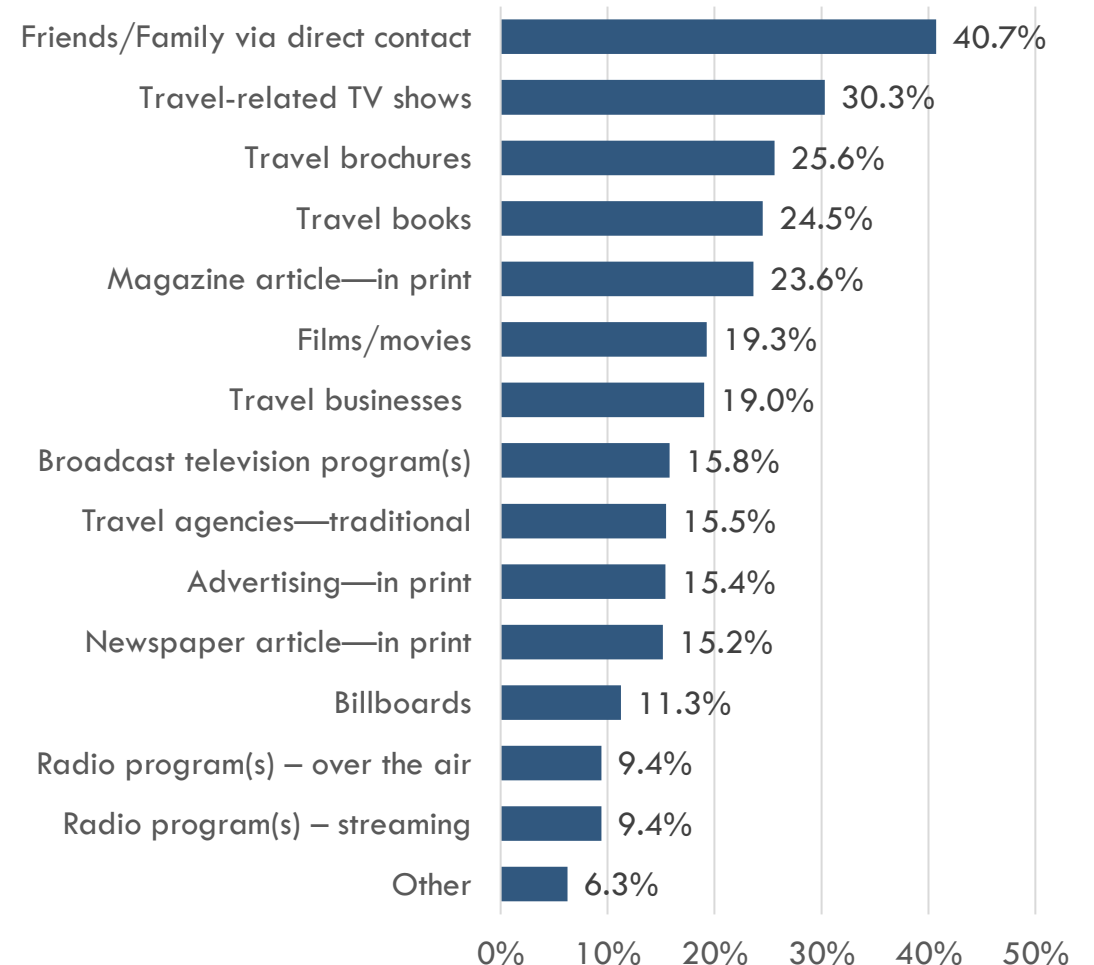
Most Appealing Arizona Statements vs. Most Believable Arizona Statements



Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration





***DETAILED DESTINATION PERCEPTION
SURVEY FINDINGS:***

**PERCEPTIONS OF THE
SOUTHWEST UNITED STATES**

MOST DESIRED DESTINATION IN THE SOUTHWEST

Top-of-mind, Leisure Travelers overwhelmingly think of Arizona as the Southwestern destination they would most like to visit. Further, of those destinations more specific than a state, Phoenix and the Grand Canyon (both also Arizona) almost top the list, exceeded only by Las Vegas. Each persona typically agrees, with several noting modest competitive pressure from Texas and New Mexico.



Question: Please think specifically about the Southwestern United States. Name one destination in this region that you most want to visit in the next two years?
Base: All persona respondents. 3,004 completed surveys.

Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Arizona	34.2%	29.3%	33.4%	34.8%	32.6%
Texas	12.8%	10.3%	14.2%	13.3%	12.0%
New Mexico	12.2%	13.6%	10.3%	9.3%	10.8%
Las Vegas, NV	8.4%	10.5%	10.1%	8.1%	8.5%
Grand Canyon, AZ	1.6%	1.3%	2.4%	3.9%	3.9%
Utah	5.1%	6.2%	4.3%	4.9%	4.5%
Phoenix, AZ	3.0%	4.6%	3.6%	3.5%	4.1%
Colorado	3.0%	2.8%	3.6%	3.4%	3.5%
Nevada	2.8%	1.8%	2.9%	2.7%	2.7%
Las Vegas, NV	1.7%	2.1%	2.0%	2.0%	2.3%
Austin, TX	1.4%	3.6%	1.7%	2.4%	1.4%
Sedona, AZ	0.6%	1.0%	0.8%	0.7%	1.1%
Santa Fe, NM	0.6%	0.3%	0.0%	0.5%	0.7%
Albuquerque, NM	0.3%	1.5%	0.5%	0.5%	0.8%
Tucson, AZ	0.2%	0.3%	0.1%	0.1%	0.5%
Base	632	389	945	817	1,748

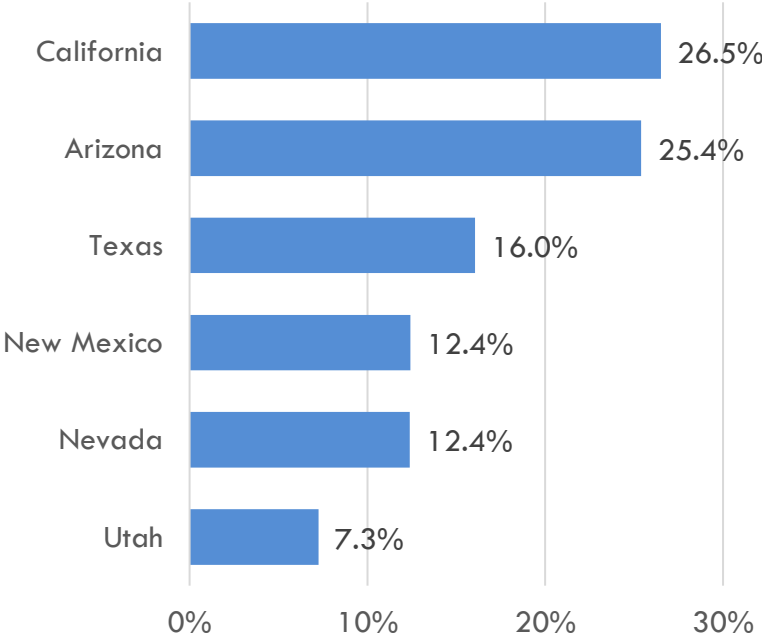
*“I want to take a road trip
to Arizona. Phoenix is
interesting. I love nature
and Native American
history.”*



MOST DESIRED DESTINATION IN SOUTHWEST

Of six listed Southwest destinations, travelers clearly prefer California (26.5%) and Arizona (25.4%) over other regional competitors. Although California leads among total travelers and every persona group, Arizona solidly owns the number two spot. The highest proportions of votes for Arizona come from Luxury (25.4%) and Foodie personas (25.2%).

Figure: Most Desired Destination in Southwest



Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
California	27.6%	28.3%	31.5%	31.8%	27.1%
Arizona	23.5%	25.4%	21.1%	22.9%	25.2%
Texas	16.7%	15.0%	19.8%	18.9%	16.3%
Nevada	10.4%	11.0%	11.3%	9.8%	12.1%
New Mexico	14.1%	13.1%	10.5%	9.8%	12.3%
Utah	7.7%	7.2%	5.6%	6.8%	7.2%
Base	912	566	1401	1219	2432

Question: Now think specifically about states in the Southwestern USA. Which of these would you most want to visit in the next two years? (Select one)
Base: All persona respondents. 3,004 completed surveys.

REASON FOR WANTING TO VISIT DESIRED SOUTHWEST DESTINATION

Overall, travelers mention **local nature and climate (10.7%)**, **scenic beauty (8.9%)**, and **new experiences (6.7%)** as top reasons to visit a Southwestern destination. Travelers in each persona typically choose the same leading features with a stronger voice for beauty coming from Natural History Lovers (7.4%, ranks third), Luxury Travelers (7.3%, ranks second), Self-Care Seekers (7.7%, ranks third), and Wild Bunch (7.3%, ranks fourth).



Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Local nature and climate	9.5%	6.6%	9.8%	11.6%	11.0%
Scenic beauty	7.9%	7.1%	8.9%	10.9%	9.0%
New experiences	5.5%	5.4%	6.2%	8.2%	6.4%
Loved ones in the area	3.6%	2.4%	3.5%	3.6%	5.2%
City life	3.5%	3.7%	4.7%	5.0%	4.8%
Variety of things to do	3.8%	3.4%	3.3%	3.1%	3.4%
Beauty	7.4%	7.3%	7.7%	7.3%	5.2%
Food and drink	3.6%	2.7%	3.3%	2.9%	3.2%
Beaches	1.6%	1.5%	2.9%	2.3%	2.6%
New Destination	4.1%	3.9%	2.9%	2.6%	3.2%
Las Vegas	4.1%	4.2%	3.8%	3.1%	3.2%
Culture	2.2%	2.0%	2.0%	1.5%	2.3%
Historic/cultural sites	3.0%	1.7%	1.9%	1.8%	1.7%
Personal history with the area	1.6%	1.0%	1.3%	1.3%	1.7%
Atmosphere	3.2%	3.4%	3.3%	2.6%	2.8%
Base	631	409	998	868	1,918

Question: Briefly describe why you most want to visit [most desired Southwest destination]
Base: All persona respondents. 2,406 completed surveys.

BENEFITS OF TRAVELING TO SOUTHWEST DESTINATIONS

“Destinations have a lot to offer in terms of natural beauty.”

“To see another part of the country, experience the culture and food. Each part has its own vibe.”

“[Arizona is] Less expensive than New York. In remote locations, your dollar goes further. You can experience the finer things in life without paying so much.”

The benefits of taking a leisure trip to Southwest U.S. destinations are the warm weather, outdoor recreation, natural beauty and the opportunity to relax. Regardless of the cities and states considered appealing places to visit, these were generally seen as advantages of taking a Southwest trip. For a few, food—particularly Southwest and Mexican cuisines—is also a key benefit.

For those who mentioned Arizona as an appealing destination, Grand Canyon National Park, the spectacular landscapes and deserts, and the opportunity to experience a different culture or way of life are also seen as benefits to visiting the state. Furthermore, it was noted that Arizona was more affordable and more relaxed compared to other areas of the U.S.



“Nature is really beautiful in that [Southwest] region. It’s much more relaxed. It’s not crowded like big cities. It’s a very different culture—still the U.S. but very different compared to the East Coast.”

A scenic landscape photograph of an Arizona desert. In the background, several prominent red rock formations rise against a clear, deep blue sky. The foreground is filled with a dense, lush green forest of trees, likely pines or oaks, which partially obscures the base of the rock formations. The lighting suggests a bright, sunny day, with the rocks appearing warm and the trees vibrant green.

PERCEPTIONS OF THE ARIZONA DESTINATION BRAND

TOP-OF-MIND ARIZONA ASSOCIATIONS

“I’m fascinated by the mountains. I was born and raised in Chicago where everything is flat. Arizona has beautiful scenery and mountains and deserts. It’s so beautiful there. The weather is great.”

“Perfect weather. Healthier lifestyle because of good weather. There are spas and retreats.”

The most common associations with Arizona are the warm weather, desert, the outdoors and hiking. In addition, Grand Canyon National Park, Phoenix and Scottsdale were specific destinations shared when travelers were asked what first comes to mind when they think of Arizona. Other top-of-mind associations with Arizona were:

- Native American culture
- Saguaro cactus
- Spas
- Healthy lifestyle

The above associations, especially warm weather, natural beauty and the outdoors, were also considered strengths of Arizona as a leisure travel destination.

REASON FOR WANTING TO VISIT ARIZONA

Local nature and climate draw travelers to Arizona (28.1%), aided by scenic beauty (8.7%), the Grand Canyon (7.2%), and the weather (5.7%). Every persona resoundingly agrees with the top choice and, although not always in the same exact order, they always place the other aforementioned reasons next.



Detail by Persona

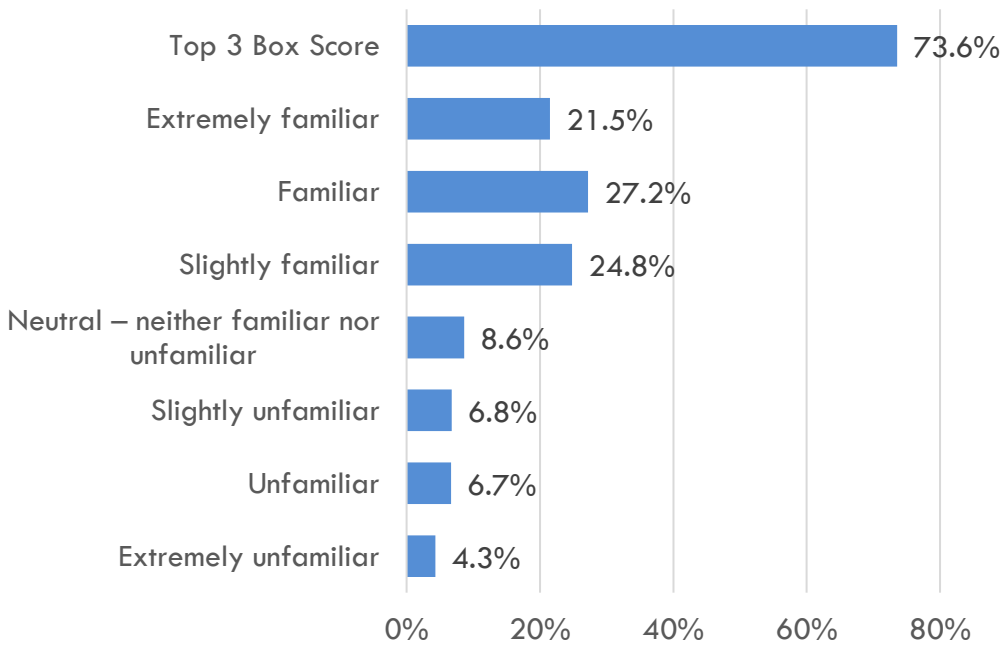
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Local nature and climate	21.6%	19.4%	25.8%	26.9%	29.2%
Scenic beauty	6.6%	8.2%	8.1%	10.4%	8.8%
Grand Canyon	8.9%	7.7%	5.5%	6.1%	6.6%
Weather	5.7%	6.9%	6.6%	5.2%	5.2%
Desert	4.2%	3.7%	3.6%	3.6%	3.8%
New experiences	2.3%	0.8%	2.6%	4.0%	2.9%
Landscape	2.4%	3.7%	2.8%	2.2%	2.6%
Nature	2.4%	2.9%	3.0%	4.2%	2.5%
Sightseeing	3.5%	2.4%	2.2%	3.0%	2.3%
Loved ones in the area	1.2%	0.8%	1.2%	2.0%	2.1%
Beauty	3.0%	3.2%	2.9%	3.0%	2.1%
Atmosphere	2.6%	1.1%	2.5%	2.8%	2.1%
Sedona	1.7%	4.5%	1.8%	0.8%	1.7%
Food and drink	2.4%	0.8%	2.0%	1.5%	1.8%
Sports	1.4%	3.2%	1.3%	0.8%	1.7%
Base	575	376	890	756	1,752

Question: Briefly describe what (if anything) about Arizona makes you want to visit there. Even if you are unfamiliar with Arizona, answer based on your current perceptions.
Base: All persona respondents. 2,202 completed surveys.

FAMILIARITY WITH ARIZONA AS A PLACE TO VISIT

Three-quarters of these travelers have some familiarity with Arizona as a place to visit (73.6%), including one-in-five who claims to be “extremely familiar” (21.5%). Each persona feels much more familiar with Arizona than Total Travelers. Except for Foodies who lag slightly (75.0%), at least four-in-five are familiar, led by Luxury Travelers (84.5%) and Natural History Lovers (84.1%). Further, over a third of these two personas (Luxury Travelers and Natural History Lovers) feel “extremely familiar” with Arizona.

Figure: Familiarity with Arizona as a Place to Visit



Question: How familiar are you with Arizona as a place to visit?
Base: All persona respondents. 3,004 completed surveys.

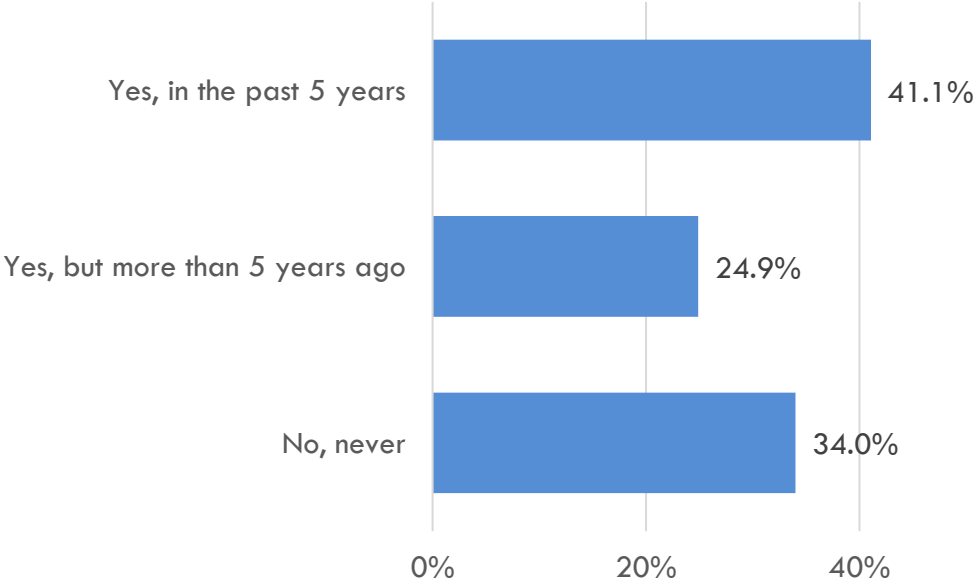
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Top 3 Box Score	84.1%	84.5%	82.1%	80.7%	75.0%
Extremely familiar	45.4%	37.1%	31.0%	31.5%	24.3%
Familiar	21.3%	29.0%	30.3%	29.2%	26.7%
Slightly familiar	17.4%	18.4%	20.8%	20.0%	24.0%
Neutral	5.0%	4.6%	6.3%	6.6%	7.9%
Slightly unfamiliar	3.5%	4.8%	5.0%	4.8%	6.4%
Unfamiliar	3.8%	3.5%	4.1%	4.8%	6.6%
Extremely unfamiliar	3.5%	2.7%	2.6%	3.1%	4.2%
Base	912	566	1,401	1,219	2,432

PAST VISITATION TO ARIZONA FOR LEISURE

Two-thirds of leisure travelers have visited Arizona in the past (66.0%); including two-in-five who have visited in the past five years (41.1%). Each persona notes a higher level of past visitation than that noted for Total Travelers. Luxury Travelers have the strongest history with Arizona (consistent with their strong familiarity with the state), with four-in-five having visited (80.2%), including more than half (57.4%) who have visited in the past five years. Natural History Lovers are very close behind (76.6% have visited; 57.5% in the past five years). Foodies lag the other personas (66.2% have visited; 43.3% in the past five years), very slightly exceeding Total Travelers.

Figure: Past Visitation to Arizona For Leisure



Question: Have you visited Arizona on a leisure trip before?
Base: All persona respondents. 3,004 completed surveys.

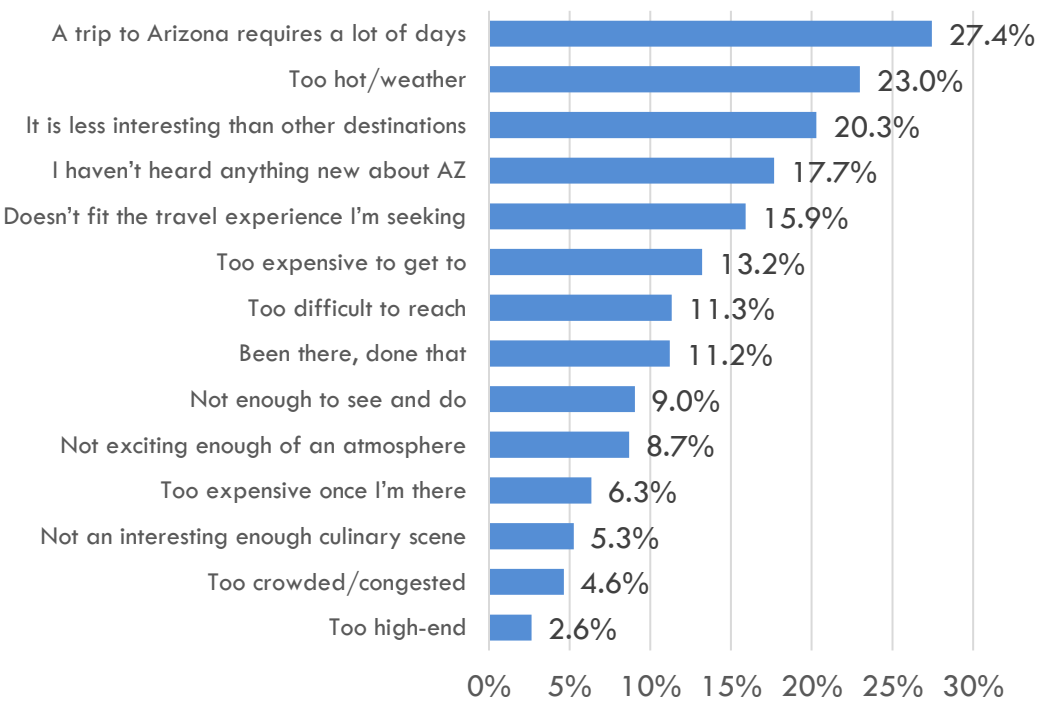
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Yes, in the past 5 years	57.5%	57.4%	54.6%	51.4%	43.3%
Yes, but more than 5 years ago	19.2%	22.8%	18.3%	18.5%	22.9%
No, never	23.4%	19.8%	27.1%	30.1%	33.8%
Base	912	576	1,401	1,219	2,432

TOP REASONS FOR NOT VISITING ARIZONA IN THE PAST 5 YEARS

Non-recent visitors most commonly say that time is the reason they haven't visited Arizona in the past five years (27.4% say a trip there requires a lot of days). Hot weather (23.0%) and less interesting than other places (20.3%) round out the top three deterrents. Although not necessarily in the same rank order, each persona generally agrees with these top three reasons. Exceptions occur with “haven't heard anything new about the destination” as one of the top three reasons for Natural History Lovers (17.3%), Self-Care Seekers (20.7%), and the Wild Bunch (17.1%) and “doesn't fit the type of travel experience I'm seeking” for Luxury Travelers (23.9%).

Figure: Top Reasons For Not Visiting Arizona in the Past 5 Years



Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
A trip to Arizona requires a lot of days	26.4%	18.5%	22.0%	31.9%	28.7%
Too hot/weather	25.9%	28.2%	19.7%	19.7%	23.8%
It is less interesting than other destinations	16.8%	25.6%	16.6%	16.0%	19.9%
I haven't heard anything new about the destination	17.3%	18.9%	20.7%	17.1%	18.0%
Doesn't fit the type of travel experience I'm seeking	14.9%	23.9%	13.4%	11.4%	15.5%
Too expensive to get to	11.2%	4.6%	9.6%	16.1%	12.6%
Too difficult to reach (not enough flights, too many layovers/flights involved)	12.3%	10.1%	12.4%	11.0%	11.8%
Been there, done that	12.3%	16.0%	9.2%	5.9%	10.4%
Not enough to see and do	9.9%	9.2%	10.5%	7.6%	8.7%
Not exciting enough of an atmosphere	8.5%	11.3%	9.7%	5.9%	8.9%
Too expensive once I'm there	8.0%	3.8%	6.2%	8.1%	6.0%
Not an interesting enough culinary scene	6.1%	5.0%	6.1%	4.8%	5.6%
Too crowded/congested	5.3%	5.0%	5.7%	4.4%	4.8%
Too high-end	3.5%	4.2%	4.9%	3.9%	2.9%
Base	375	238	628	589	1,361

Question: Which are reasons you have not visited Arizona in the past five years? (Select all that apply)
Base: Persona respondents who have not visited Arizona in the past five years. 1,749 completed surveys.

HOW ARIZONA IS SUPERIOR TO SOUTHWEST DESTINATION

Travelers cite local nature and climate (15.6%), scenic beauty (4.6%), atmosphere (3.9%), weather (3.8%), and the Grand Canyon (3.7%) as Arizona’s primary benefits over competitors, which aligns with their lead reasons for wanting to visit Arizona.



Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Local nature and climate	12.6%	9.0%	12.5%	13.4%	15.5%
Scenic beauty	4.7%	5.4%	4.4%	4.7%	4.2%
Atmosphere	3.1%	4.3%	4.3%	4.1%	4.0%
Weather	3.3%	4.3%	5.1%	3.6%	3.8%
Grand Canyon	3.7%	4.0%	2.0%	2.2%	3.5%
Landscape	2.2%	1.4%	1.6%	1.7%	2.0%
Affordable	0.8%	2.9%	1.5%	2.1%	1.7%
New experiences	1.4%	0.7%	1.5%	1.1%	1.9%
Variety of things to do	1.2%	0.4%	1.3%	1.3%	1.9%
Culture	1.8%	0.7%	1.5%	1.9%	1.8%
Nature	1.0%	1.1%	1.9%	2.5%	1.5%
Desert	1.6%	1.1%	1.7%	1.4%	1.7%
People	1.2%	0.7%	1.7%	1.3%	1.6%
Beauty	1.8%	1.8%	1.7%	1.4%	1.2%
City life	1.0%	0.7%	1.5%	1.9%	1.5%
Base	491	278	751	634	1,184

Question: How is Arizona superior to [most desired Southwest destination] as a place to visit?
Base: All persona respondents. 1,452 completed surveys.

HOW SOUTHWEST DESTINATION IS SUPERIOR TO ARIZONA

Local nature and climate, the same leading feature that draws visitors to Arizona, also draws visitors to other places (7.4%). Leisure travelers also note a variety of things to (7.1%) and casinos (7.1%) as strengths of competitors.



Detail by Persona

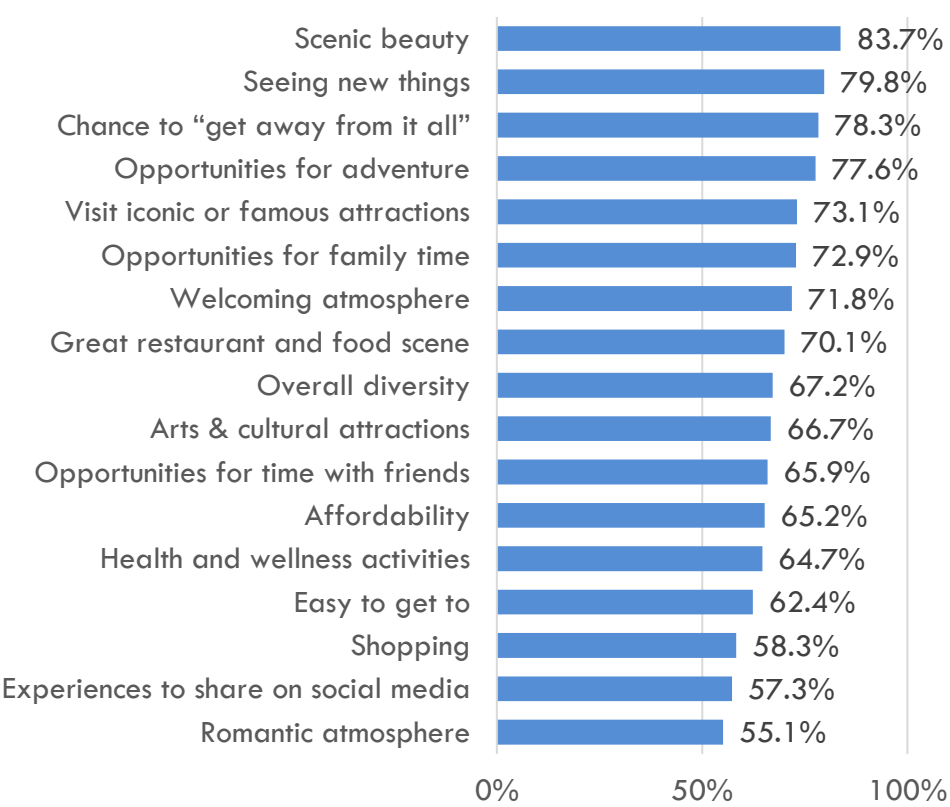
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Local nature and climate	7.9%	1.9%	7.9%	8.8%	8.2%
Variety of things to do	3.0%	5.3%	7.0%	6.8%	7.2%
Casinos	6.2%	8.2%	6.4%	5.6%	6.1%
Activities	4.9%	4.3%	7.4%	7.6%	5.7%
City life	3.3%	1.9%	4.1%	3.5%	4.8%
Atmosphere	3.6%	5.8%	3.7%	4.3%	3.1%
New Destination	4.9%	2.9%	3.3%	2.5%	3.0%
Weather	3.9%	3.8%	4.1%	3.0%	3.4%
Culture	3.9%	4.8%	2.9%	2.8%	3.5%
Sightseeing	2.3%	3.4%	3.5%	3.3%	3.3%
Beaches	2.0%	1.4%	2.5%	2.0%	2.7%
Family	3.0%	2.9%	2.3%	2.8%	2.3%
Scenic beauty	2.0%	2.4%	1.7%	1.3%	2.0%
Base	305	208	484	396	902

Question: How is [most desired Southwest destination] superior to Arizona as a place to visit?
Base: All persona respondents. 1,133 completed surveys.

RATING OF ARIZONA'S ATTRIBUTES

Arizona has successfully built a strong image for scenic beauty. Total Travelers (83.7%) and every persona put scenic beauty in top position as the state's highest rated destination attribute. In addition, more than half of leisure travelers associate Arizona with everything on the list, suggesting the state enjoys a strong overall reputation.

Figure: Rating of Arizona's Attributes (% Rating Good or Very Good)



Question: Please rate Arizona as a leisure destination for the following attributes using the scale below. Even if you are unfamiliar with Arizona please answer based on your current perceptions.
Base: All persona respondents. 3,004 completed surveys.

Detail by Persona

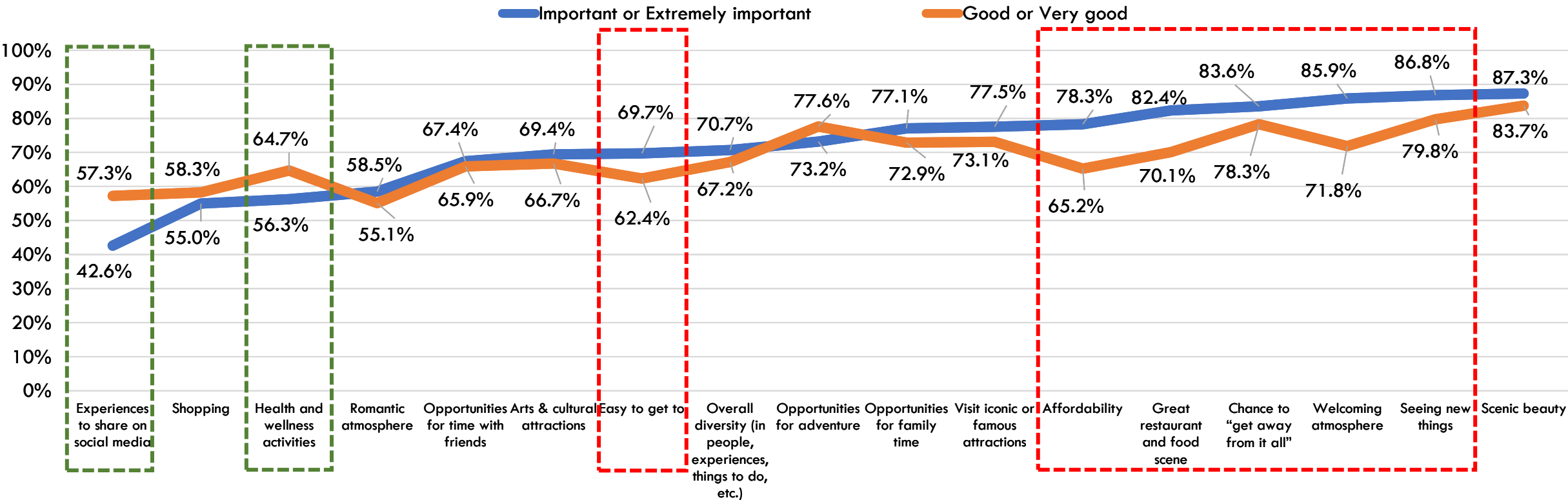
Top-Two Box Score (% Rating Each as Good or Very Good in AZ)	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Scenic beauty	86.6%	84.8%	85.2%	85.9%	84.7%
Seeing new things	83.8%	78.3%	84.9%	85.2%	81.3%
Chance to "get away from it all"	83.4%	78.3%	83.4%	83.7%	79.2%
Opportunities for adventure	83.9%	77.2%	82.8%	83.8%	78.6%
Visit iconic or famous attractions	82.1%	76.0%	80.4%	78.9%	74.4%
Opportunities for family time	80.3%	71.6%	82.2%	84.2%	73.7%
Welcoming atmosphere	79.5%	73.1%	81.7%	80.4%	73.3%
Great restaurant and food scene	78.2%	72.1%	80.2%	78.2%	71.8%
Overall diversity (in people, experiences, things to do, etc.)	77.1%	69.8%	78.1%	77.7%	68.7%
Arts & cultural attractions	79.1%	69.6%	77.6%	77.2%	68.5%
Opportunities for time with friends	74.8%	67.7%	77.9%	77.4%	67.1%
Affordability	74.8%	70.7%	78.0%	73.7%	67.5%
Health and wellness activities	74.1%	70.5%	78.7%	76.5%	66.3%
Easy to get to	74.2%	66.8%	74.9%	72.3%	64.1%
Shopping	70.9%	60.2%	74.7%	71.8%	60.8%
Experiences to share on social media	69.1%	54.8%	73.7%	73.9%	60.2%
Romantic atmosphere	70.8%	59.9%	71.0%	68.5%	57.6%

IMPORTANT ATTRIBUTES TO DESTINATION SELECTION VS. RATING OF ARIZONA'S ATTRIBUTES

Arizona underperforms on five of the top ten attributes these travelers consider most important to the destination selection process. Meanwhile, the state is on-par for most of the remaining attributes and above-par on health/wellness and experiences to share on social media. This chart ranks, from right to left, the percent of travelers who rated each attribute as “important”/”very important” for destinations they would like to visit (blue) against the percent of those who rated each of those attributes as “good”/”very good” for Arizona (orange). The red boxes highlight those most important attributes where Arizona performs below par. The green box highlights areas where Arizona’s ratings exceed importance. Messaging to Arizona’s core and target audiences that emphasizes these red-boxed important attributes could effectively attract more visitors to the state.

Important Attributes to Destination Selection vs Association of Attributes with Arizona

Top 2 Box Score—% Rating each as “Important” or “Extremely important” vs. % selecting “Good” or “Very good” with Arizona



ARIZONA TRAVEL EXPERIENCES

The travel experiences that Arizona is perceived to be great at offering align with the state's strengths as a destination. When asked what experiences Arizona is great at offering visitors, common responses included nature, outdoor activities such as hiking and horseback riding, dining and food, and art and museums, which were also later noted as Arizona's strong suits. Similar to appealing destinations in the Southwest and associations with Arizona, Grand Canyon National Park was mentioned as a key travel experience. High value travelers also brought up history, relaxation and spas as great experiences visitors can have in the state.

While the warm weather was a common association with Arizona, it was also seen as a downside to visiting the state. Despite the appeal of the weather for those who live in colder climates, people wouldn't want to go when it's "scorching hot," and thus Spring and Fall are good seasons to visit. It was also noted that, depending on where a traveler was flying in from, much of Arizona is not easily accessible because of the perception that Phoenix has the only big airport.

"It's a desert area but so beautiful. There are outdoor plants, trees and rocks that you don't see in other states. It has significant city experiences and amenities, as well as really remote hikes if you want it."

"If there's anything that's going to get me outside of my hotel room where I can be relaxed and become part of Arizona for that week, I'm going to be there."

IDEAL TRAVELERS FOR ARIZONA

Arizona is seen as a destination that is well-suited for outdoorsy and adventurous travelers. Similarly, people who are healthy and physically fit to go hiking and enjoy the state's outdoor recreational activities were seen as ideal types of travelers. From younger Millennial and Gen Z travelers, to Gen X, to Baby Boomer travelers, travelers of all generations are considered good fits, as the state has experiences for all ages, such as active as well as more relaxed offerings. Someone who chooses Arizona as a travel destination and visits the state communicates that they are adventurous and love nature. It was also noted that travelers who visit Arizona *"desire something different, not the mundane. Something unique."*

Those who love nightlife, those who love beaches and those who are not fans of hot weather are perceived to be poor fits for visiting Arizona. Those who prefer big, urban cities such as New York or San Francisco, those who are *"high maintenance"* and people who aren't into the outdoors are also less than ideal for Arizona.

"It [Arizona] has things for the college crowds, 25-35 year olds, things for married couples and senior crowds."

"The type of traveler who picks Arizona is looking for something different. They prefer to take the path less traveled. It's not a known holiday destination, so they're choosing it for a particular reason. They're more creative and adventurous."

"It's not for people who are very high maintenance, who couldn't handle the heat or who want to go out to a bar."

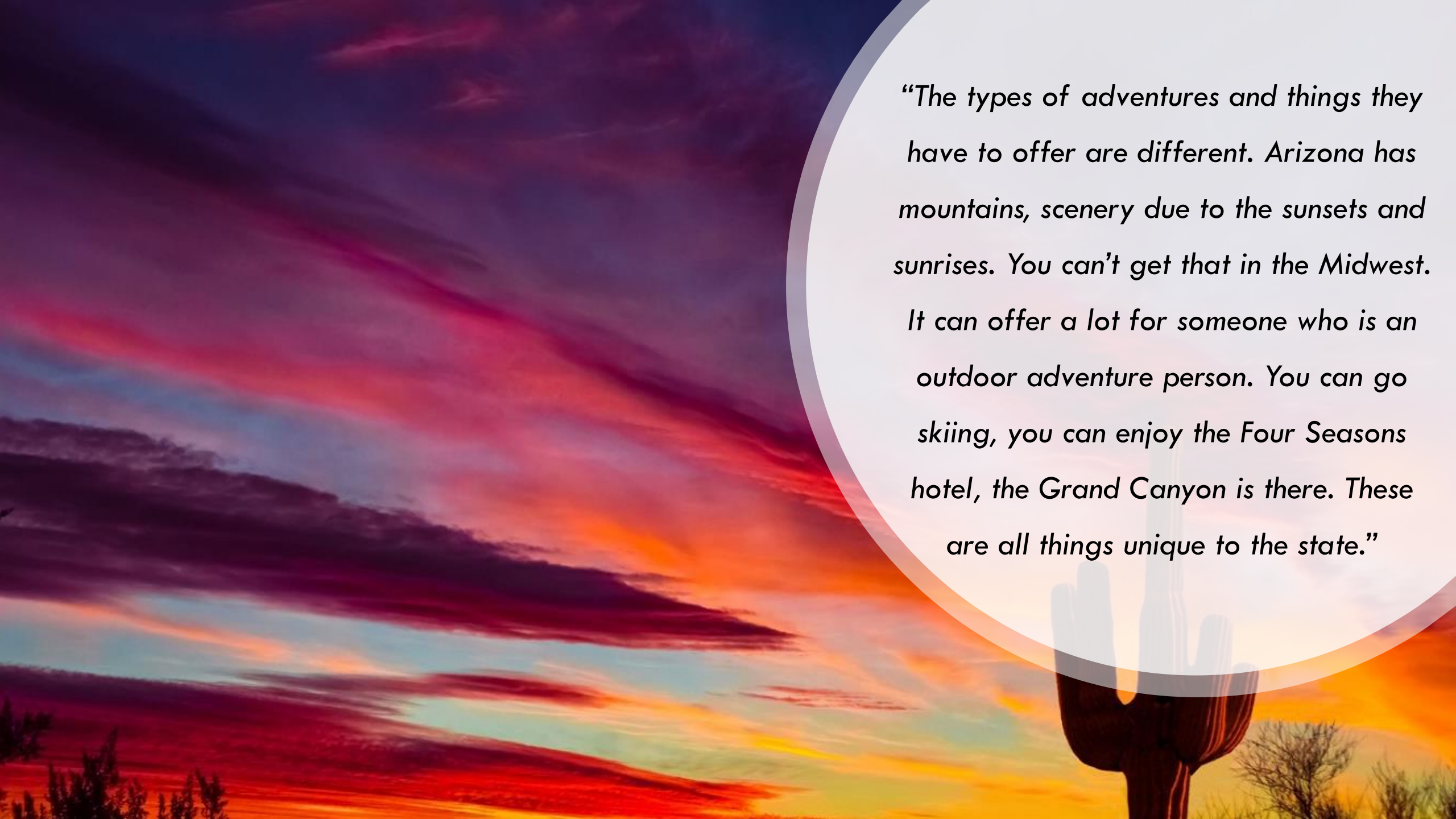
ARIZONA IN THE MEDIA

“Recent news doesn’t affect my interest. It doesn’t deter me either.”

“During the election I heard about Arizona as a swing state. There’s a less strict COVID safety policy and probably a higher number of cases.”

When probed about media coverage about Arizona, a few travelers brought up politics and elections. For the few who mentioned mid-term elections or politics, this didn’t appear to affect their interest in visiting the state. However, one participant who brought up that the state *“turned blue in the last election”* did share that this increases interest in visiting because she’s *“a progressive person.”*

Aside from politics, other mentions of Arizona in the news were related to Covid safety precautions and advertising, include University of Arizona and hiking trail ads. For the one mention of Covid, this traveler shared that it *“hasn’t affected my interest, it makes me more cautious, but I still want to go.”*

A vibrant sunset over a desert landscape. The sky is filled with streaks of orange, red, and purple, with some darker clouds. In the foreground, a saguaro cactus is visible on the right side. The overall scene is a beautiful representation of an Arizona sunset.

“The types of adventures and things they have to offer are different. Arizona has mountains, scenery due to the sunsets and sunrises. You can’t get that in the Midwest. It can offer a lot for someone who is an outdoor adventure person. You can go skiing, you can enjoy the Four Seasons hotel, the Grand Canyon is there. These are all things unique to the state.”

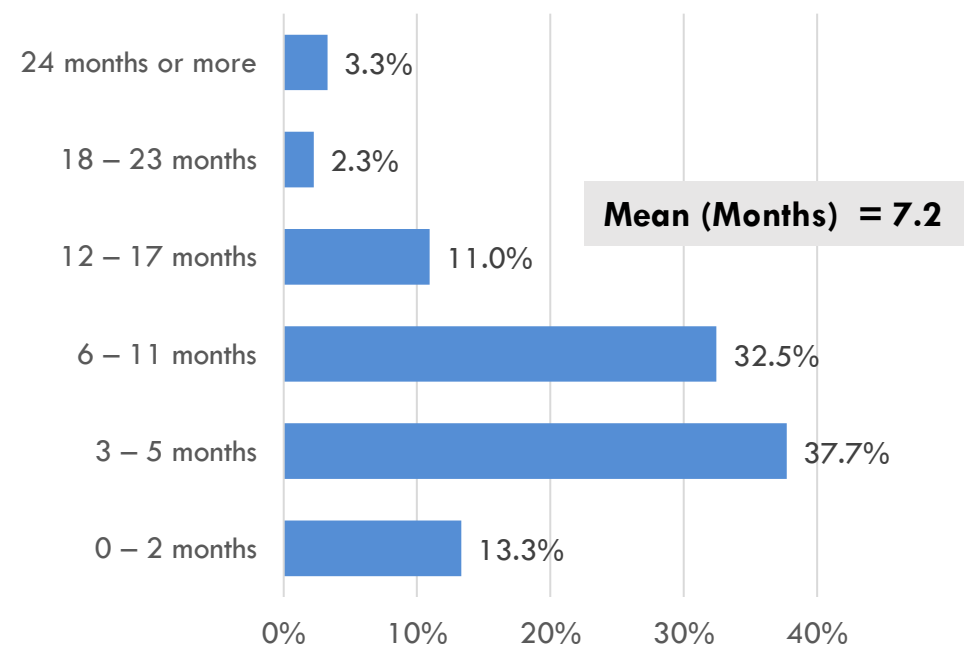
A desert landscape at sunset. The sky is a gradient of orange, yellow, and purple. The sun is a bright yellow orb on the horizon, partially obscured by the silhouettes of saguaro cacti. A large, full moon is visible in the upper left portion of the sky. The foreground is filled with the dark silhouettes of various cacti, including several tall saguaros and some smaller, spiky cacti. The overall mood is serene and iconic of the Arizona desert.

THE IDEAL ARIZONA TRIP

ADVANCE TRAVEL PLANNING

Travelers think that they would begin to plan a leisure trip to Arizona an average of seven months (7.2 months) before the trip; however, half would plan less than six months ahead (51.0%). Each persona expects to plan an average of roughly seven months before the trip.

Figure: Advance Travel Planning



Detail by Persona

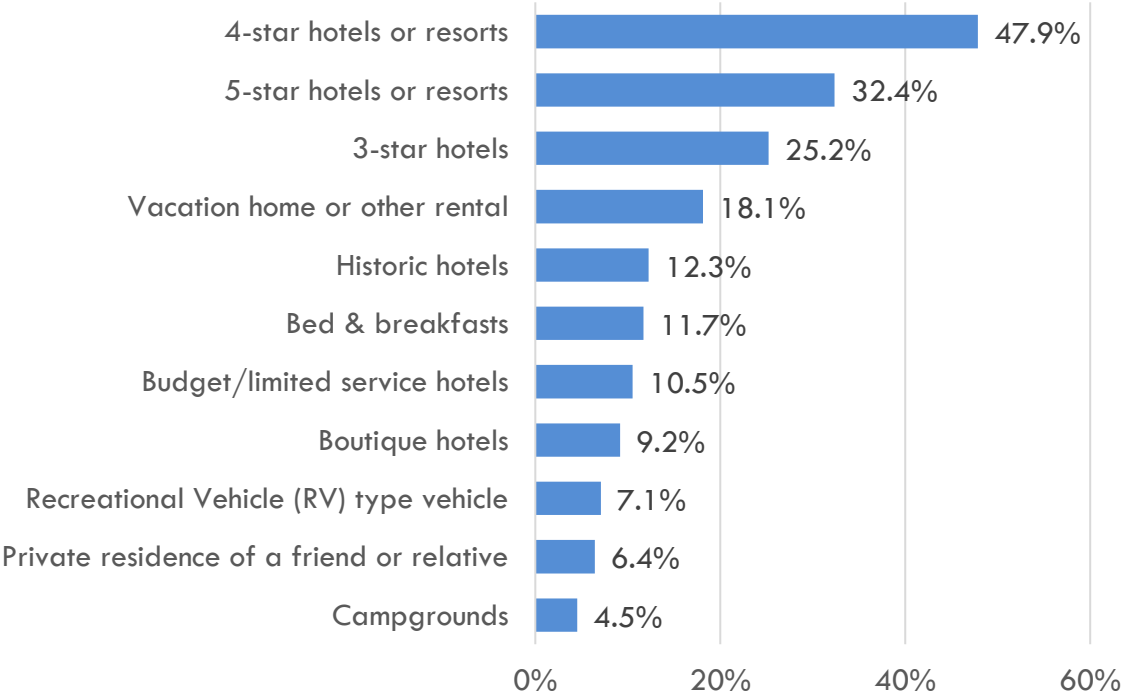
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
24 months or more	4.1%	4.1%	2.2%	3.4%	3.4%
18 – 23 months	2.1%	3.0%	1.9%	2.0%	2.2%
12 – 17 months	12.4%	12.0%	11.1%	12.6%	10.4%
6 – 11 months	30.3%	27.9%	32.5%	33.5%	32.7%
3 – 5 months	36.1%	37.5%	37.9%	34.9%	37.3%
0 – 2 months	15.1%	15.5%	14.3%	13.5%	13.9%
Mean	7.4	7.4	7.0	7.4	7.2
Base	912	566	1,401	1,219	2,432

Question: How far in advance would you begin planning for a leisure trip to Arizona?
Base: All persona respondents. 3,004 completed surveys.

PLACE OF STAY

These travelers most commonly would stay at 4-star hotels (47.9%), followed distantly by 5-star (32.4%) and 3-star hotels (25.2%). Three personas would agree, opting for 4-star hotels most often: Self-Care Seekers (47.9%), Wild Bunch (45.5%), and Foodies (48.3%). In contrast, the largest share of Natural History Lovers (43.5%) and Luxury Travelers (53.0%) expect to stay in 5-star accommodations.

Figure: Place of Stay



Question: Where would you most likely stay during this trip? (Select all that apply.)
Base: All persona respondents. 3,004 completed surveys.

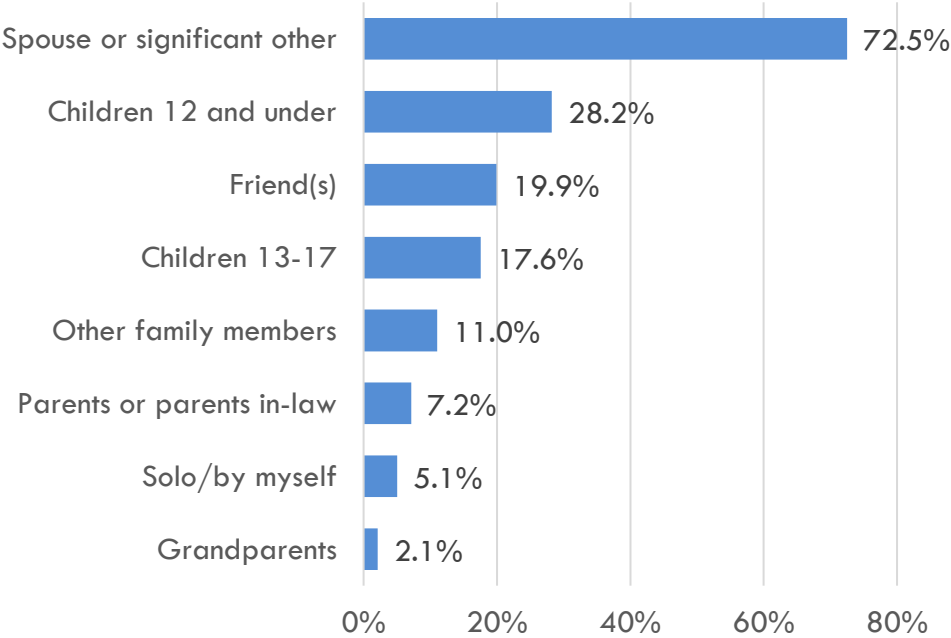
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
4-star hotels or resorts	42.8%	51.6%	47.9%	45.5%	48.3%
5-star hotels or resorts	43.5%	53.0%	43.9%	39.7%	34.4%
3-star hotels	23.9%	14.1%	21.4%	25.3%	26.0%
Vacation home or other rental	16.4%	10.6%	14.4%	17.4%	19.1%
Historic hotels	15.7%	11.8%	12.8%	13.2%	12.9%
Bed & breakfasts	13.9%	8.7%	11.4%	11.1%	12.3%
Budget/limited service hotels	11.9%	6.9%	10.6%	11.6%	9.9%
Boutique hotels	10.3%	12.5%	11.2%	9.6%	9.7%
RV type vehicle	8.0%	5.7%	7.5%	9.1%	7.2%
Private residence of a friend or relative	5.7%	5.5%	5.5%	5.7%	6.5%
Campgrounds	4.1%	1.6%	3.1%	4.7%	4.2%
Base	911	566	1,400	1,218	2,431

TRAVEL PARTY COMPOSITION

Three-quarters of these travelers expect to visit with their spouse/significant other (72.5%), by far the dominant travel companion. That pattern holds, to some degree, in every persona. The Wild Bunch is most likely to include children, either younger (54.7%, 12 and under) or older (31.7%, 13-17), but a spouse/significant other is still the primary companion (76.7%).

Figure: Travel Party Composition



Detail by Persona

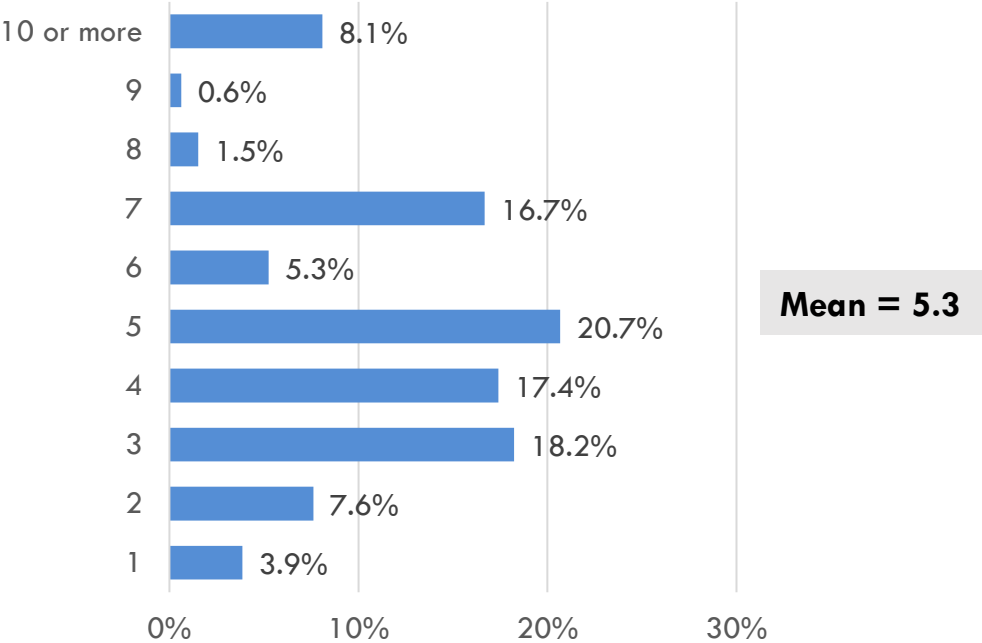
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Spouse or significant other	73.0%	79.0%	67.6%	76.7%	73.2%
Children 12 and under	32.6%	24.9%	37.8%	54.7%	28.7%
Friend(s)	18.8%	16.4%	23.9%	18.2%	20.4%
Children 13-17	19.5%	19.8%	21.3%	31.7%	17.4%
Other family members	8.2%	6.9%	9.1%	7.1%	10.8%
Parents or parents in-law	6.8%	5.3%	7.6%	7.3%	7.4%
Solo/by myself	5.8%	4.9%	5.6%	2.7%	4.9%
Grandparents	2.4%	2.7%	2.4%	2.2%	2.2%
Base	912	566	1,401	1,219	2,432

Question: Who would you travel with on this trip to Arizona? (Select all that apply)
Base: All persona respondents. 3,004 completed surveys.

LENGTH OF STAY - DAYS

Potential visitors expect to stay an average of almost a week on a trip to Arizona (5.3 days). The trip length would hover near that average for each persona, ranging from 5.1 days (Self-Care Seekers) to 5.5 days (Natural History Lovers). (Self-Care Seekers) to 5.5 days (Natural History Lovers).

Figure: Length of Stay



Detail by Persona

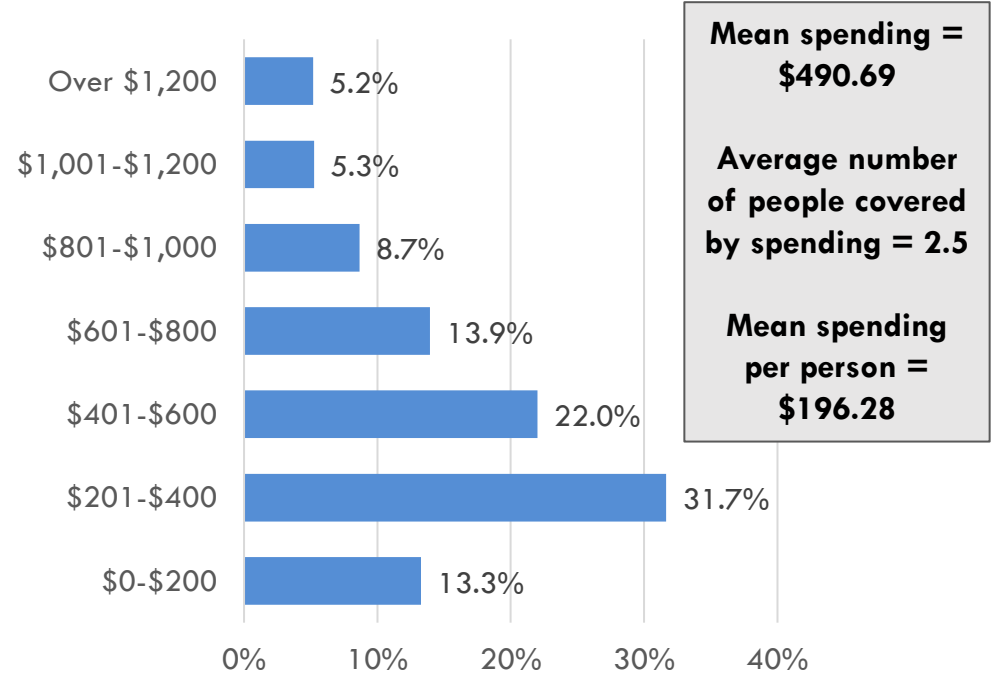
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
10 or more	10.4%	9.5%	8.1%	7.7%	8.4%
9	1.0%	0.4%	0.9%	1.1%	0.7%
8	1.8%	2.1%	1.6%	2.0%	1.5%
7	16.2%	16.4%	12.6%	14.4%	16.3%
6	4.8%	6.0%	5.1%	4.8%	5.5%
5	19.3%	20.1%	20.4%	21.1%	19.9%
4	14.7%	16.8%	17.1%	16.9%	17.5%
3	18.3%	17.0%	19.8%	18.9%	18.6%
2	8.7%	7.1%	9.4%	9.3%	7.6%
1	4.8%	4.6%	5.1%	3.9%	3.9%
Mean	5.5	5.4	5.1	5.2	5.3
Base	912	566	1,401	1,219	2,432

Question: How many days would you spend in Arizona? (Select one)
Base: All persona respondents. 3,004 completed surveys.

LIKELY SPENDING PER DAY

The average travel party expects to spend \$491 per day and \$196 per person on an Arizona trip. The persona groups range from \$503 (Foodies) to \$638 (Luxury Travelers) in total travel party spending and from \$185 per person (Wild Bunch) to \$266 per person (Luxury Travelers).

Figure: Likely Spending per Day



How much would you likely spend PER DAY for all your purchases (hotel, food, transportation, shopping, entertainment, etc.) while in Arizona?
Base: All persona respondents. 3,004 completed surveys.

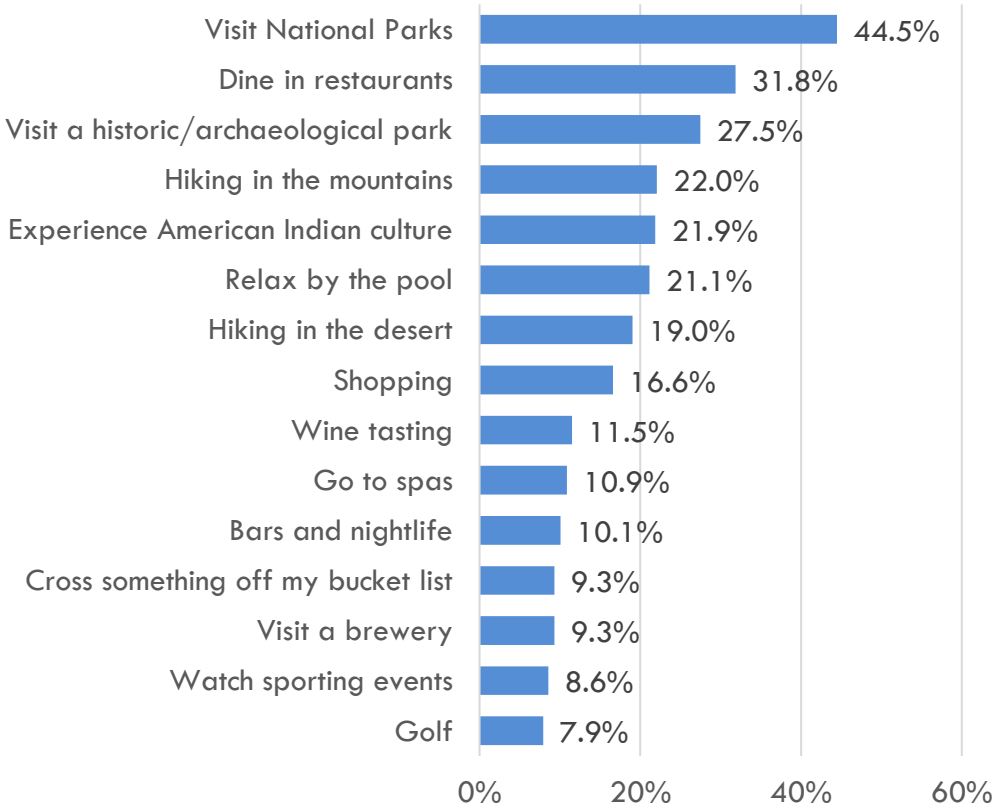
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Over \$1,200	9.0%	12.9%	5.9%	7.0%	5.8%
\$1,001 - \$1,200	9.0%	11.3%	8.4%	7.4%	5.6%
\$801 - \$1,000	12.7%	13.6%	12.8%	12.0%	9.2%
\$601 - \$800	13.7%	16.8%	18.7%	16.7%	14.4%
\$401 - \$600	18.9%	22.6%	22.1%	21.5%	21.4%
\$201 - \$400	23.8%	17.0%	23.6%	24.9%	31.4%
\$0 - \$200	12.9%	5.8%	8.5%	10.5%	12.3%
Mean spending	\$555.72	\$638.34	\$561.66	\$549.76	\$502.58
Average # of people covered by spending	2.5	2.4	2.6	3.0	2.5
Mean spending per person	\$219.88	\$265.66	\$218.95	\$185.49	\$201.70
Base	912	566	1,401	1,219	2,432

TOP ARIZONA ACTIVITIES

Visiting National Parks dominates other most desired trip activities (44.5%). Dining (31.8%) and historic/archaeological parks (27.5%) for a second-level tier. Nearly equal, next-in-line are mountain hiking (22.0%), American Indian culture (21.9%), and relaxing by the pool (21.1%). Although not to the same degree, every persona also places National Parks at the top. Notable differences include an emphasis on dining by Foodies (34.1%) and Luxury Travelers (36.7%); relaxing by the pool by Self-Care Seekers (24.6%); wine tasting by Self-Care Seekers (14.8%), the Wild Bunch (14.2%), and Luxury Travelers (14.0%); going to spas by Self-Care Seekers (17.5%) and Luxury Travelers (13.8%); and mountain hiking by the Wild Bunch (24.9%)

Figure: Top Arizona Activities



Detail by Persona

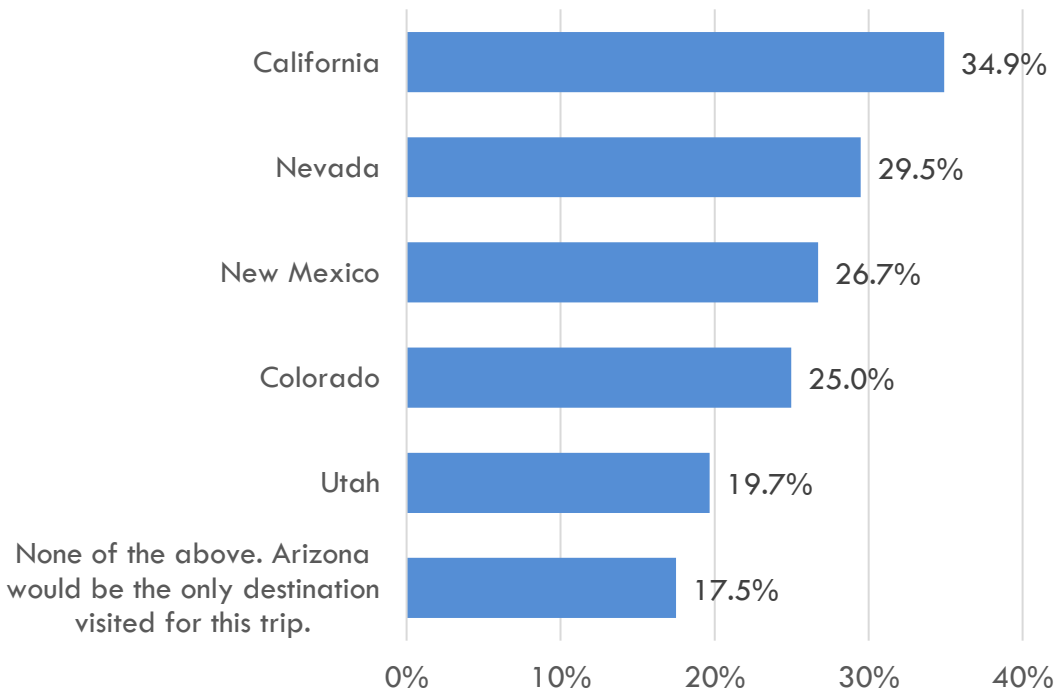
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Visit National Parks	43.3%	40.3%	34.5%	42.9%	42.8%
Dine in restaurants	24.9%	36.7%	28.8%	27.2%	34.1%
Visit a historic/archaeological park	28.6%	22.1%	21.1%	24.1%	26.2%
Hiking in the mountains	20.9%	17.1%	20.8%	24.9%	21.6%
Experience American Indian culture	24.0%	19.8%	17.1%	19.8%	21.9%
Relax by the pool	18.8%	21.6%	24.6%	22.5%	21.1%
Hiking in the desert	19.3%	17.7%	18.0%	20.8%	18.4%
Shopping	17.0%	16.6%	21.6%	19.2%	17.6%
Wine tasting	12.5%	14.0%	14.8%	14.2%	12.3%
Go to spas	12.5%	13.8%	17.5%	10.7%	11.1%
Bars and nightlife	11.3%	9.5%	13.3%	11.6%	10.6%
Cross something off my bucket list	9.6%	7.6%	9.9%	9.9%	10.1%
Visit a brewery	11.5%	8.7%	12.1%	10.8%	10.2%
Watch sporting events	10.5%	8.1%	10.8%	10.5%	9.4%
Golf	8.9%	12.2%	8.6%	8.0%	8.0%
Base	912	566	1,401	1,219	2,432

Question: If you visited Arizona, which would you most want to do? (Select at most 3)
Base: All persona respondents. 3,004 completed surveys.

DESTINATIONS OUTSIDE ARIZONA WOULD ALSO VISIT

Four-in-five leisure travelers would visit an additional Southwestern state on a trip to Arizona (82.5%), most commonly California (34.9%). Nevada (29.5%), New Mexico (26.7%), and Colorado (25.0%) compete for the second-place choice. Minor variations occur among the personas, with California always in the lead position.

Figure: Destinations Outside Arizona Would Also Visit



Question: Which of the following destinations outside Arizona would you also visit as a part of this trip? (Select all that apply)
Base: All persona respondents. 3,003 completed surveys.

Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
California	39.7%	34.1%	44.4%	43.4%	36.5%
Nevada	27.9%	26.3%	29.7%	28.9%	30.1%
New Mexico	32.2%	26.5%	26.1%	24.5%	27.6%
Colorado	26.8%	23.9%	24.0%	26.2%	26.1%
Utah	23.8%	20.8%	19.3%	19.5%	20.3%
AZ would be only destination	10.5%	20.1%	11.1%	12.8%	16.4%
Base	911	566	1,400	1,218	2,431



MARKETING ARIZONA TO LEISURE TRAVELERS

ONE WORD TO DESCRIBE THE PERFECT VACATION

Relaxation dominates what travelers most want from a vacation; in addition, a large share of them mention a beach. Other key concepts include fun and family.



Question: What is the one word you would use to describe the perfect vacation?
Base: All persona respondents. 2,666 completed surveys.

Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Relaxation	7.4%	9.1%	9.8%	10.4%	12.0%
Beach	6.4%	7.4%	7.4%	8.0%	8.2%
Relaxing	8.3%	10.7%	9.9%	8.8%	9.7%
Fun	3.6%	3.3%	3.3%	4.0%	4.0%
Family	2.4%	1.3%	2.2%	3.7%	2.4%
Adventure	3.2%	2.8%	2.2%	2.9%	2.9%
Cruise	1.1%	2.6%	0.8%	0.2%	1.3%
Peace	1.3%	0.7%	1.5%	1.3%	2.0%
Nature	2.4%	1.1%	1.7%	1.9%	1.5%
Good	3.2%	2.6%	3.0%	2.9%	1.7%
Luxurious	1.7%	3.7%	2.2%	1.5%	1.8%
Excitement	0.8%	0.9%	1.3%	1.1%	1.2%
Family Vacation	1.5%	1.5%	1.4%	2.0%	1.6%
Luxury	1.3%	1.5%	1.5%	1.1%	1.4%
Hawaii	1.3%	1.7%	1.0%	0.8%	0.9%
Base	755	460	1,209	1,040	2,146

FAVORITE THINGS TO DO ON VACATION

Overall, half of total travelers favor eating/dining out (50.1%) and just relaxing/chilling (42.9%) over other possible activities; being in nature ranks a distant third (31.6%). Those three activities top the list for Total Travelers and for most personas, but show varying degrees of fervor. Natural History Lovers, Luxury Travelers, Self-Care Seekers, and especially, Foodies agree with placing dining at the top. Being in nature captures the lead for Natural History Lovers (34.5%) and the Wild Bunch (40.9%) while Luxury Travelers add experiencing a new culture (30.7%) over being in nature.

Figure: Favorite Things To Do On Vacation



Question: What are your favorite things to do on vacation? (Select as many as three)
Base: All persona respondents. 3,004 completed surveys.

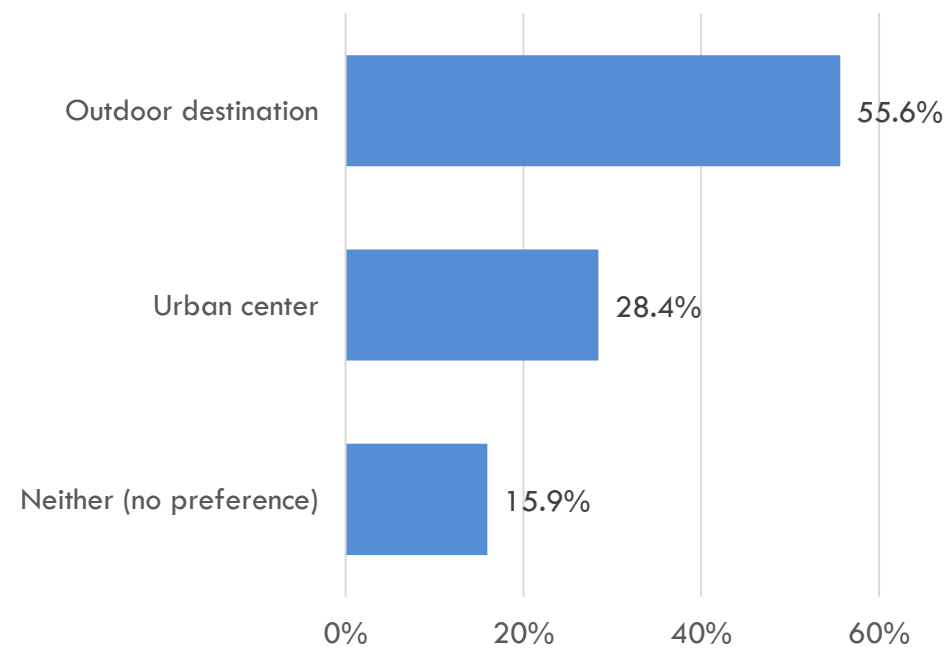
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Eat/dine out	38.9%	48.2%	40.9%	37.5%	52.4%
Relax/Chill	34.4%	41.2%	38.3%	40.0%	42.1%
Be in nature	34.5%	26.3%	31.3%	40.9%	30.8%
Experience a new culture	30.2%	30.7%	24.9%	23.1%	26.6%
Visit parks	22.4%	15.5%	20.7%	25.1%	20.4%
Go to museums	27.2%	19.3%	15.6%	15.4%	19.7%
Lay by the pool	15.6%	21.0%	18.9%	16.0%	19.5%
Go hiking	13.9%	11.1%	15.3%	18.9%	14.5%
Explore nightlife	14.6%	13.8%	16.1%	13.7%	13.0%
Meet new people	13.2%	13.8%	15.0%	11.6%	12.1%
Share photos of my trip on social media	12.7%	11.7%	15.0%	13.2%	11.7%
Buy souvenirs	11.4%	9.0%	11.3%	10.7%	10.0%
Adventure sports	9.6%	9.5%	10.6%	12.3%	7.9%
Base	912	566	1,401	1,219	2,432

WEEKEND GETAWAY DESTINATION PREFERENCE

Of those making a choice, travelers vote two-to-one in favor of outdoor destinations over urban centers (55.6% vs. 28.4%) for a weekend getaway. The Wild Bunch, in particular, choose the Outdoors over Urban centers (65.4% vs. 25.8%). At the other end of the spectrum, Luxury Travelers are the most likely to choose Urban centers (37.5%), but Outdoor destinations win even for that group (46.5%).

Figure: Weekend Getaway Destination Preference



Detail by Persona

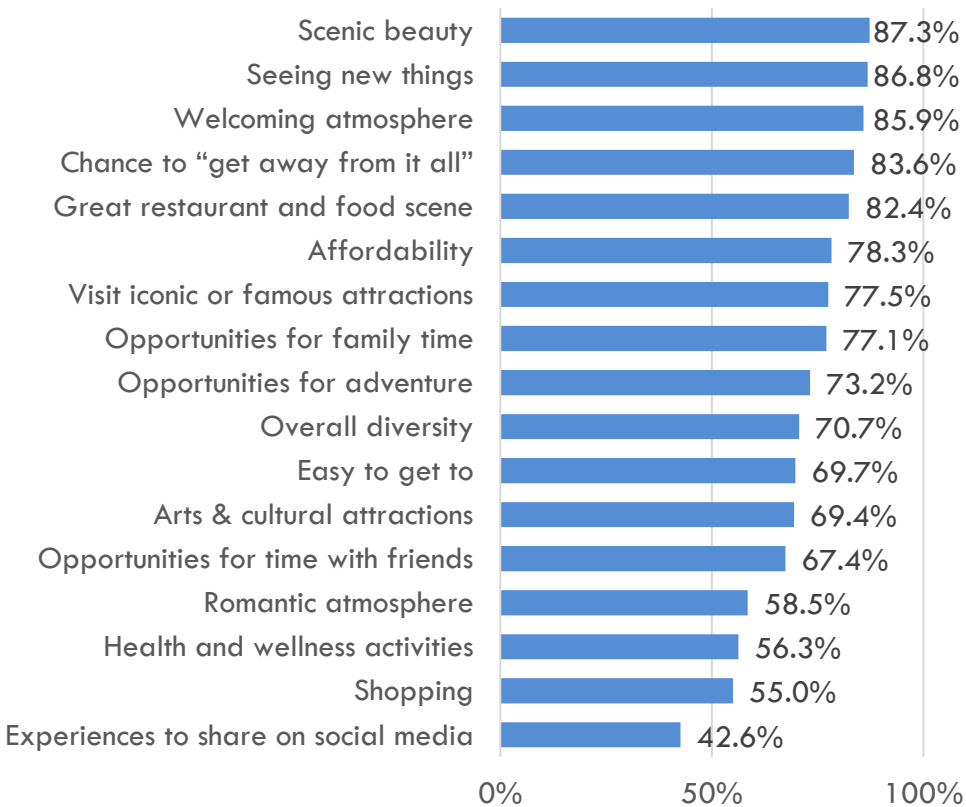
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Outdoor destination	58.7%	46.5%	55.5%	65.4%	55.6%
Urban center	28.8%	37.5%	34.3%	25.8%	28.5%
Neither (no preference)	12.5%	16.1%	10.1%	8.8%	15.9%
Base	912	566	1,401	1,219	2,432

Question: Would you generally rather take a weekend getaway to an outdoor destination or an urban center (big city)?
Base: All persona respondents. 3,004 completed surveys.

IMPORTANT ATTRIBUTES TO DESTINATION SELECTION

Scenic beauty, seeing new things, welcoming, being able to “get away from it all,” and the food scene top the list of important attributes, cited by more than four-in-five of these travelers. Affordability (78.3%), iconic/famous attractions (77.5%), and family time (77.1%) rank highly as well. By persona, almost every group considers every feature more important than average travelers, usually by a significant degree. The exception is Luxury Travelers who, as might be expected, are significantly less concerned about affordability and also downplay family time, easy to get to, adventure opportunities, and time with friends.

Figure: Important Attributes For Destination Selection
(Percent who rated “Important” or “Extremely important”)



Detail by Persona
(Percent who rated “Important” or “Extremely important”)

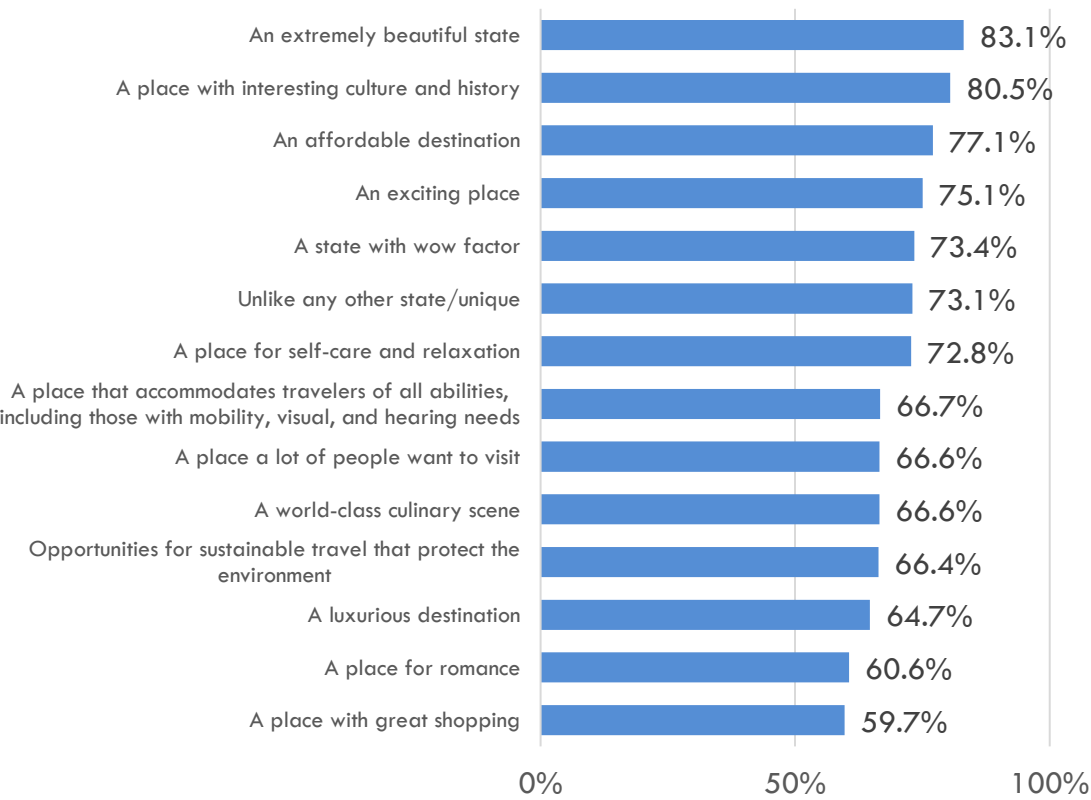
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Scenic beauty	91.7%	86.6%	88.2%	89.6%	87.9%
Seeing new things	91.3%	85.2%	87.1%	89.7%	87.7%
Welcoming atmosphere	88.3%	85.0%	86.3%	88.7%	86.8%
Chance to “get away from it all”	86.5%	81.3%	85.3%	87.3%	84.5%
Great restaurant and food scene	85.5%	82.3%	86.4%	83.8%	86.1%
Affordability	84.1%	63.6%	81.5%	86.2%	79.6%
Visit iconic or famous attractions	86.2%	79.7%	82.2%	80.8%	79.2%
Opportunities for family time	81.8%	70.1%	83.5%	91.7%	78.2%
Opportunities for adventure	83.6%	65.9%	82.7%	86.1%	75.0%
Overall diversity (in people, experiences, things to do, etc.)	82.8%	71.7%	81.6%	79.9%	72.9%
Easy to get to	77.6%	65.9%	78.7%	77.9%	71.4%
Arts & cultural attractions	84.4%	72.3%	78.9%	76.3%	71.4%
Opportunities for time with friends	76.0%	62.0%	79.1%	76.0%	68.5%
Romantic atmosphere	72.8%	63.3%	75.9%	70.4%	61.1%
Health and wellness activities	70.9%	57.8%	77.0%	72.6%	58.3%
Shopping	68.0%	58.0%	73.2%	67.8%	58.9%
Experiences to share on social media	60.4%	44.0%	65.9%	62.3%	45.8%

Question: How important would each generally be to how you would select the places you would visit? Please use the scale below.
Base: All persona respondents. 3,004 completed surveys.

APPEAL OF ARIZONA ATTRIBUTES

Consistent with scenic beauty being listed as the top attribute associated with Arizona (shown earlier), travelers note that Arizona’s primary appeal is for its beauty (83.1% say it is an extremely beautiful state). Culture/history (80.5%) and affordability (77.1%) round out the top three features. Every persona rates every feature above the level set by average travelers except Luxury Travelers, who emphasize only one: a luxurious destination (74.0%).

Figure: Appeal of Arizona Attributes
(Percent who rated “Somewhat appealing” or “Extremely appealing”)



Detail by Persona
(Percent who rated “Somewhat appealing” or “Extremely appealing”)

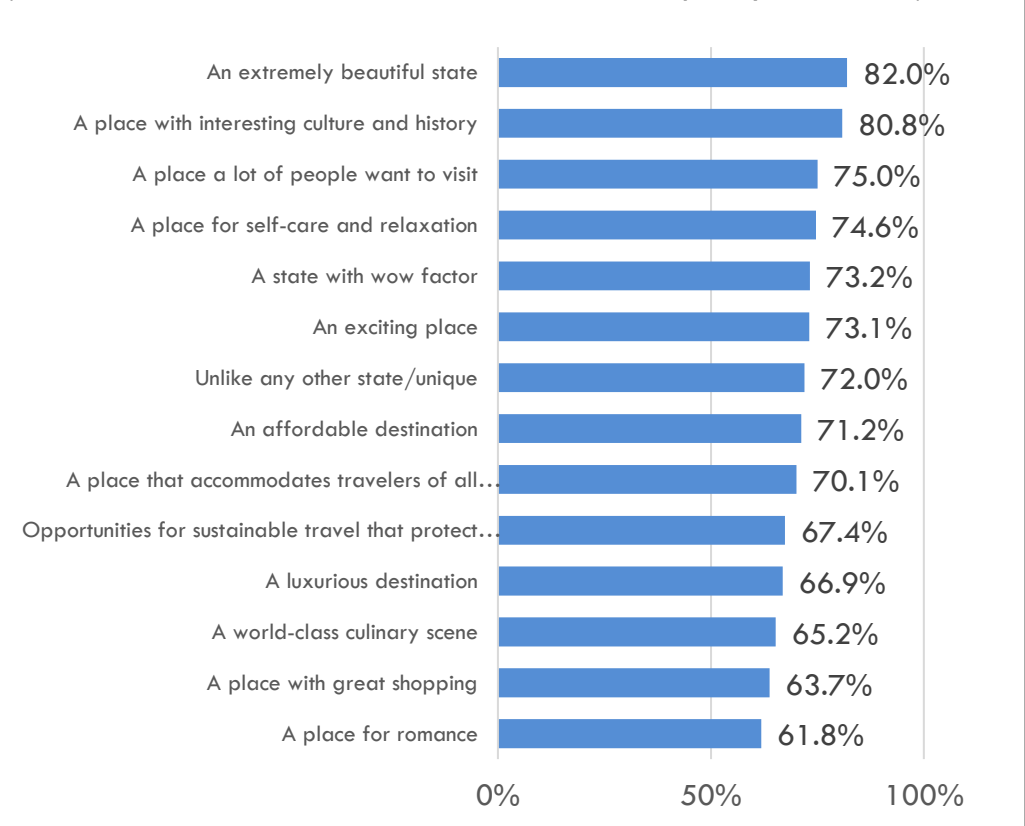
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
An extremely beautiful state	87.2%	82.0%	84.9%	87.9%	84.0%
A place with interesting culture and history	85.1%	80.4%	83.5%	85.1%	81.8%
An affordable destination	82.1%	75.4%	82.8%	83.4%	78.9%
An exciting place	81.3%	74.0%	82.5%	84.3%	77.2%
A state with wow factor	80.0%	74.4%	81.2%	82.2%	75.3%
Unlike any other state/unique	80.0%	74.2%	77.9%	79.2%	74.1%
A place for self-care and relaxation	77.4%	72.3%	83.5%	82.7%	75.2%
A place that accommodates travelers of all abilities, including those with mobility, visual, and hearing needs	77.3%	65.5%	80.4%	77.8%	68.9%
A place a lot of people want to visit	75.9%	68.2%	77.7%	77.6%	68.9%
A world-class culinary scene	75.8%	67.5%	78.9%	76.5%	70.6%
Opportunities for sustainable travel that protect the environment	78.2%	66.8%	78.3%	80.6%	68.6%
A luxurious destination	73.6%	74.0%	79.9%	76.7%	67.4%
A place for romance	72.9%	64.5%	76.5%	74.9%	63.2%
A place with great shopping	70.0%	59.9%	76.6%	73.6%	63.0%

Question: If Arizona were described as follows, how appealing would you find each statement?
Arizona is/has _____.
Base: All persona respondents. 3,004 completed surveys.

BELIEVABILITY OF ARIZONA OFFERINGS

Travelers believe this messaging as well as finding it appealing. Cited by four-in-five travelers, two statements, “extremely beautiful state” (82.0%) and “interesting culture and history” (80.8%), pull ahead of the others in appeal. Further, ALL of the messaging is voted “believable” by the majority (over 60%) of travelers. Most personas find every feature even more believable than average travelers; with the exception of luxury travelers who rate most attributes near the average.

Figure: Believability of Arizona Offerings
(Percent who rated “Somewhat believable” or “Completely believable”)



Question: If Arizona were described as follows, how believable would you find each statement?
Arizona is/has _____.
Base: All persona respondents. 3,004 completed surveys.

Detail by Persona
(Percent who rated “Somewhat believable” or “Completely believable”)

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
An extremely beautiful state	85.4%	82.3%	84.0%	86.1%	83.1%
A place with interesting culture and history	83.2%	78.6%	83.5%	85.2%	81.7%
A place a lot of people want to visit	83.7%	75.6%	82.2%	83.4%	76.9%
A place for self-care and relaxation	80.3%	76.9%	83.0%	82.8%	76.6%
A state with wow factor	81.7%	73.3%	81.7%	82.9%	74.9%
An exciting place	80.2%	73.3%	79.9%	81.9%	74.9%
Unlike any other state/unique	78.2%	69.1%	78.7%	79.7%	72.8%
An affordable destination	78.2%	76.3%	80.7%	79.4%	73.4%
A place that accommodates travelers of all abilities, including those with mobility, visual, and hearing needs	78.0%	71.2%	80.4%	78.9%	71.9%
Opportunities for sustainable travel that protect the environment	78.6%	67.1%	79.0%	80.2%	69.5%
A luxurious destination	77.4%	73.3%	81.6%	78.3%	69.2%
A world-class culinary scene	76.3%	69.1%	78.3%	77.1%	67.6%
A place with great shopping	74.1%	62.0%	76.5%	76.1%	66.5%
A place for romance	72.9%	64.0%	75.7%	73.7%	64.2%

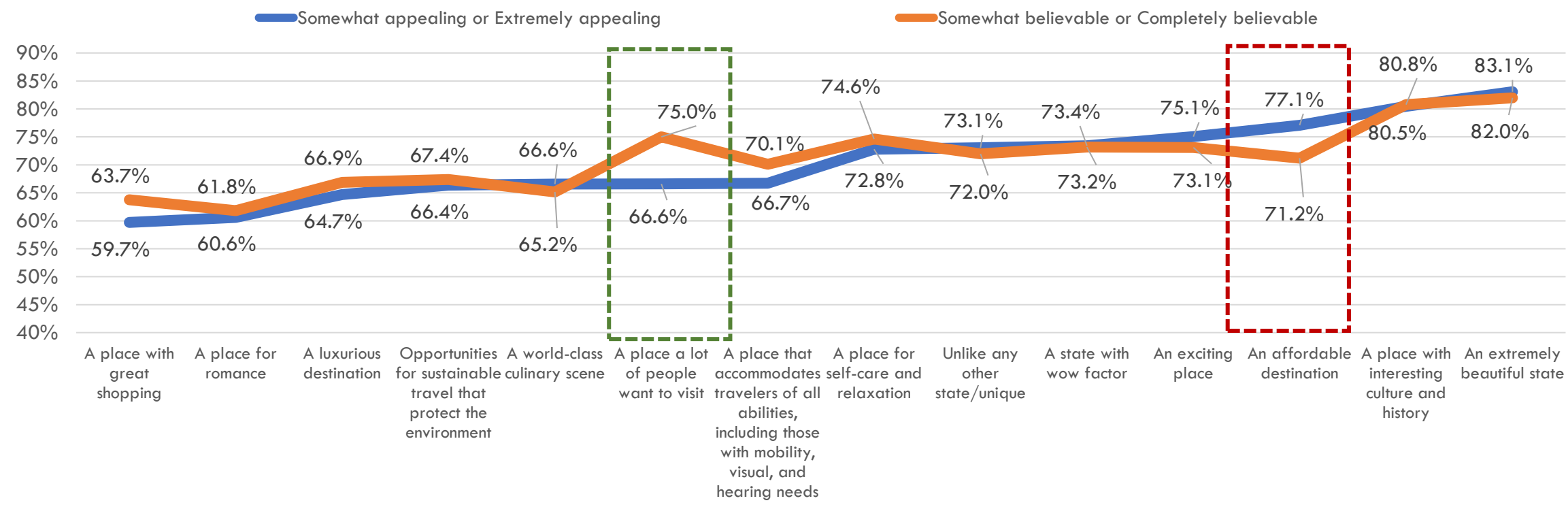
APPEALING ATTRIBUTES VS BELIEVABILITY OF ARIZONA OFFERINGS

Arizona performs very well on the believability of these appealing attributes, rating near or above par on all but one (affordability). The chart below maps the percent of leisure travelers who rated each statement as “somewhat appealing” or “extremely appealing” (blue line) against the percent who rated each statement as “somewhat believable” or “completely believable” (orange line) for Arizona.

The state performs very well as a place a lot of people want to visit (green box). Although a relatively large negative gap occurs for affordability (red box), the few remaining below-the-blue-line gaps are minor (two percentage points or less).

Appealing Attributes vs. Believability of Arizona Offerings

Top 2 Box Score—% Rating each as “Somewhat appealing” or “Extremely appealing” vs. % selecting “Somewhat” or “Completely believable” about Arizona

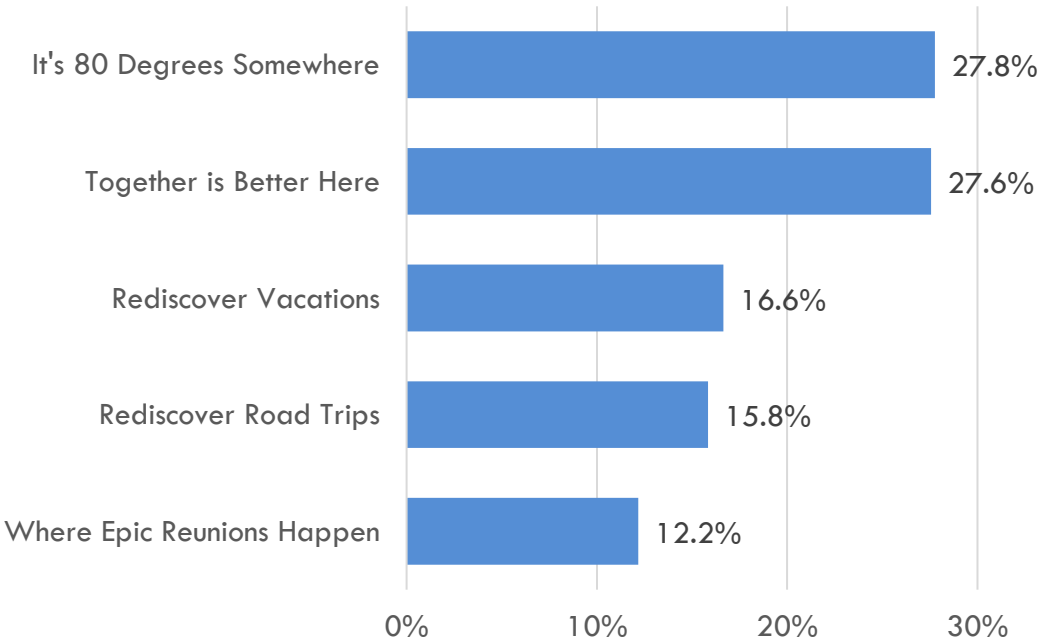


Question 1: If Arizona were described as follows, how appealing would you find each statement? Arizona is/has _____.
Question 2: If Arizona were described as follows, how believable would you find each statement? Arizona is/has _____.
Base: All persona respondents. 3,004 completed surveys.

MESSAGE TO INSPIRE VISITATION TO THE SOUTHWEST

Leisure travelers nearly equally choose “It’s 80 Degrees Somewhere” and “Together is Better Here” as the message that would most inspire them to visit (27.8%; 27.6%, respectively). However, EVERY persona chooses “Together is Better Here” as most inspiring (ranging from 28.3% for Natural History Lovers to 35.3% for Self-Care Seekers).

Figure: Message to Inspire Visitation to the Southwest



Detail by Persona

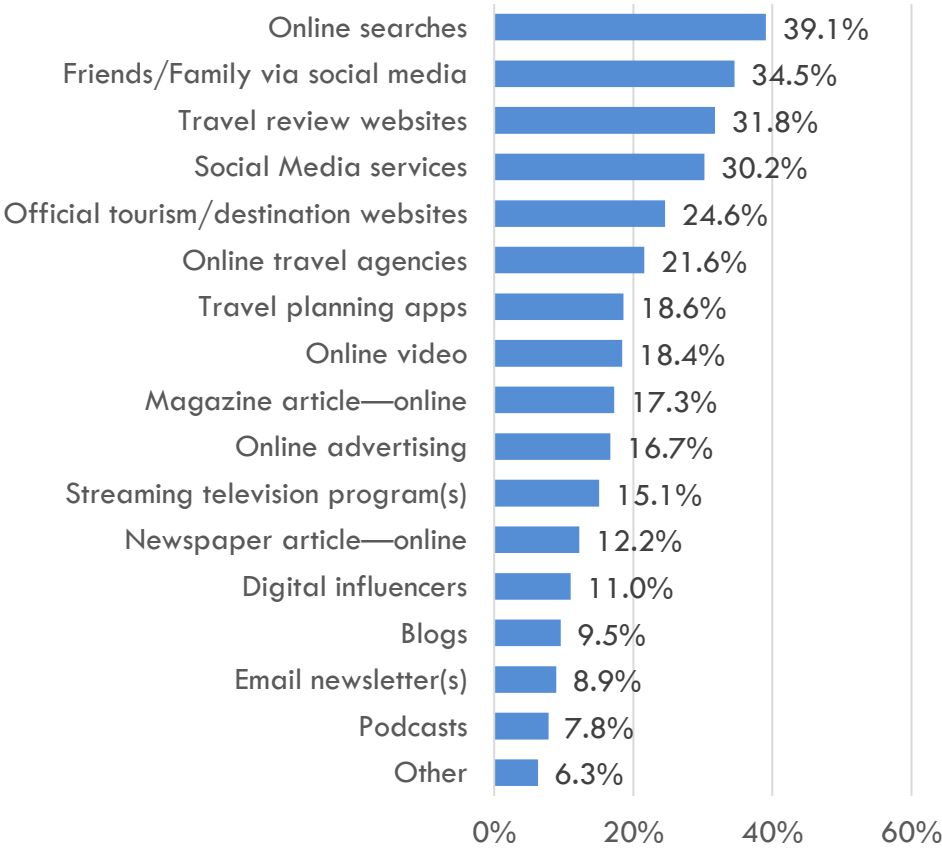
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
It's 80 Degrees Somewhere	21.2%	22.8%	22.8%	20.7%	26.8%
Together is Better Here	28.3%	29.3%	35.3%	33.3%	28.4%
Rediscover Vacations	13.5%	17.3%	14.1%	14.4%	16.6%
Rediscover Road Trips	12.3%	11.8%	8.4%	11.6%	14.6%
Where Epic Reunions Happen	24.8%	18.7%	19.4%	20.0%	13.7%
Base	912	566	1,401	1,219	2,432

Question: Imagine you are considering visiting the Southwestern USA. Please pick the ONE MESSAGE that makes you most want to spend time in Arizona?
Base: All persona respondents. 3,004 completed surveys.

DIGITAL RESOURCES USED FOR LEISURE TRAVEL INSPIRATION

Digitally, the average traveler most commonly relies on online searches (39.1%) and friends/family via social media (34.5%) for ideas and inspiration. The personas differ on resources used, exemplified by some personas using social media services (Self-Care Seekers, 36.8% and the Wild Bunch, 41.4%) even more than online searches.

Figure: Digital Resources Used for Leisure Travel Inspiration



Question: From which digital resources do you get ideas and inspiration for where to travel to for leisure? Base: All persona respondents. 2,997 completed surveys.

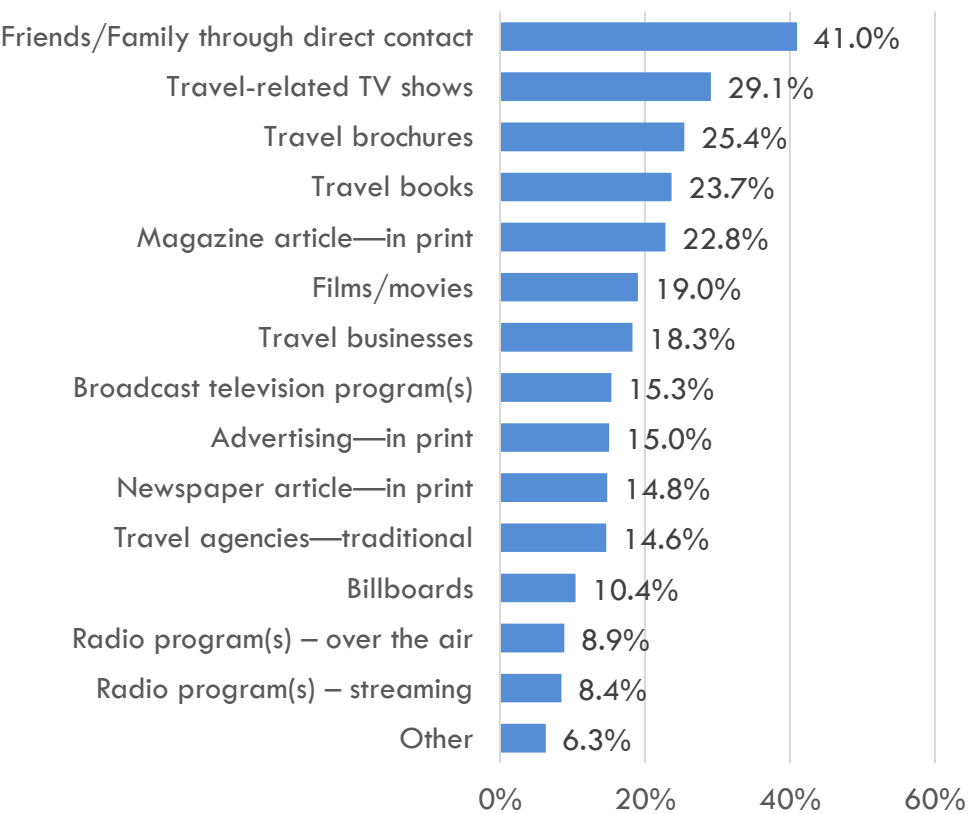
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Online searches	36.4%	40.4%	33.2%	36.0%	39.9%
Friends/Family via social media	31.4%	29.8%	34.5%	36.3%	34.7%
Travel review websites (TripAdvisor, etc.)	31.6%	36.2%	28.5%	27.5%	32.5%
Social Media services (Twitter, Facebook, Instagram, TikTok, Pinterest etc.)	33.4%	26.4%	36.8%	41.4%	32.5%
Official tourism/destination websites	26.7%	23.4%	20.6%	21.1%	24.7%
Online travel agencies (Expedia, Priceline, etc.)	24.5%	22.0%	24.4%	25.7%	22.9%
Travel planning apps	22.0%	19.5%	21.3%	20.6%	19.6%
Online video	23.1%	18.6%	22.9%	23.5%	19.6%
Magazine article—online	20.8%	21.3%	18.9%	16.4%	18.4%
Online advertising	19.9%	17.6%	19.9%	20.8%	17.8%
Streaming television program(s)	17.0%	13.8%	16.2%	17.2%	15.8%
Newspaper article—online	16.4%	18.1%	13.6%	12.8%	12.7%
Digital influencers (online personalities with large followings)	14.3%	10.8%	15.3%	15.2%	11.8%
Blogs	11.4%	9.9%	13.2%	12.5%	10.5%
Email newsletter(s)	13.0%	10.5%	11.7%	10.4%	9.3%
Podcasts	10.3%	5.9%	10.7%	10.2%	8.6%
Other	6.4%	6.2%	5.1%	4.5%	5.7%
Base	910	564	1,399	1,216	2,429

NON-DIGITAL RESOURCES USED FOR LEISURE TRAVEL INSPIRATION

Non-digitally, direct contact with friends/family dominates other non-digital resources for ideas and inspiration for the average traveler (41.0%). Cited by roughly one-in-four, a second tier is formed by travel-related TV shows (29.1%), travel brochures (25.4%), travel books (23.7%), and printed magazine articles (22.8%). Each persona generally agrees with the top mentions, although Self-Care Seekers would place travel businesses in their top five.

Figure: Non-Digital Resources Used for Leisure Travel Inspiration



Question: From which non-digital resources do you get ideas and inspiration for where to travel to for leisure? Base: All persona respondents. 2,974 completed surveys.

Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Friends/Family through direct contact	36.4%	37.5%	37.9%	40.4%	40.7%
Travel-related TV shows	32.0%	32.4%	29.4%	29.0%	30.3%
Travel brochures	30.7%	25.4%	23.1%	22.6%	25.6%
Travel books	28.8%	25.6%	21.8%	22.1%	24.5%
Magazine article—in print	28.3%	26.9%	23.6%	23.1%	23.6%
Films/movies	18.3%	15.1%	19.2%	20.9%	19.3%
Travel businesses (hotel, air, car, cruise line, tour operator, etc.)	23.2%	20.8%	23.4%	21.7%	19.0%
Broadcast television program(s)	18.9%	16.9%	16.4%	16.9%	15.8%
Advertising—in print	15.7%	16.9%	16.9%	16.7%	15.4%
Newspaper article—in print	19.3%	19.6%	15.6%	14.0%	15.2%
Travel agencies—traditional	19.6%	16.4%	19.2%	17.6%	15.5%
Billboards	14.0%	11.7%	14.6%	13.1%	11.3%
Radio program(s) – over the air	13.0%	8.5%	12.5%	12.6%	9.4%
Radio program(s) – streaming	11.1%	7.3%	12.9%	11.7%	9.4%
Other	5.7%	6.9%	5.2%	5.8%	6.3%
Base	907	562	1,388	1,210	2,406

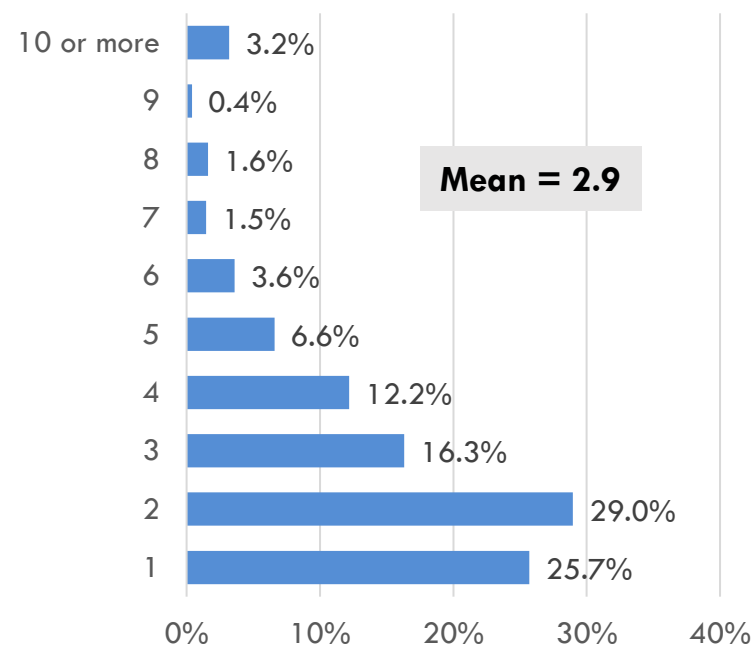
The background of the slide features a series of stylized, overlapping silhouettes of people's heads and shoulders in profile, facing right. The silhouettes are rendered in various shades of blue, teal, and red, creating a sense of depth and diversity. The central text 'RESPONDENT PROFILE' is overlaid on this graphic.

RESPONDENT PROFILE

LEISURE TRIPS TAKEN IN PAST 12 MONTHS

Overall, these travelers averaged about three trips in the past year (2.9 trips). Each persona group reports a similar level, although Luxury Travelers report more travel than others (3.6 trips).

Figure: Leisure Trips Taken in Past 12 Months



Detail by Persona

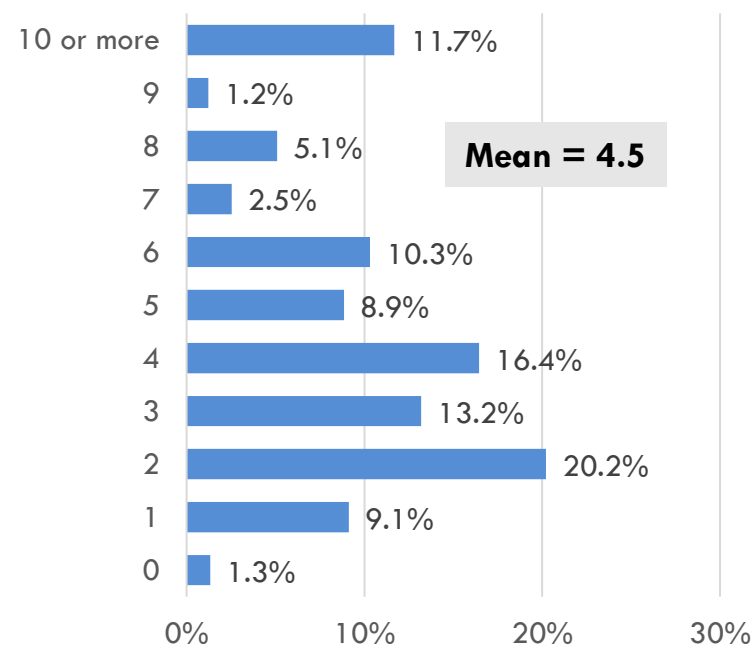
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
10 or more	3.9%	6.2%	3.1%	2.6%	3.5%
9	0.7%	0.4%	0.6%	0.6%	0.5%
8	2.5%	2.7%	1.6%	1.7%	1.7%
7	2.3%	2.1%	1.8%	1.6%	1.5%
6	3.5%	4.1%	3.6%	4.0%	3.7%
5	9.2%	10.4%	7.3%	6.6%	6.7%
4	10.4%	15.5%	12.1%	11.3%	12.7%
3	17.4%	17.8%	17.7%	16.5%	16.5%
2	27.3%	22.1%	29.6%	31.6%	29.7%
1	22.7%	18.7%	22.7%	23.4%	23.5%
Mean	3.2	3.6	3.0	3.0	3.0
Base	912	566	1,401	1,219	2,432

Question: In the PAST 12 MONTHS, how many leisure trips (of at least 100 miles round-trip from your home) have you made?
Base: All persona respondents. 3,004 completed surveys.

LEISURE TRIPS PLANNED IN NEXT 2 YEARS

Travelers plan to take an average of 4.5 trips in the next two years. Again, Luxury Travelers have more optimistic plans (5.4 trips) while the remaining personas place near the average level (4.2 to 4.6 trips).

Figure: Leisure Trips Planned in Next 2 Years



Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
10 or more	12.7%	19.1%	10.0%	9.3%	12.2%
9	1.5%	2.1%	1.6%	1.6%	1.4%
8	4.4%	6.7%	4.1%	4.8%	5.4%
7	3.0%	3.4%	3.6%	3.7%	2.5%
6	10.1%	11.7%	9.4%	8.1%	10.3%
5	9.9%	9.2%	8.6%	9.2%	9.2%
4	15.8%	17.0%	13.7%	14.8%	16.6%
3	13.3%	11.5%	15.3%	14.8%	13.3%
2	19.7%	14.5%	21.4%	21.6%	19.7%
1	8.2%	4.4%	10.8%	10.9%	8.3%
0	1.4%	0.5%	1.3%	1.2%	1.3%
Mean	4.6	5.4	4.3	4.2	4.6
Base	912	566	1,401	1,219	2,432

Question: In the NEXT TWO (2) YEARS, how many leisure trips (of at least 100 miles round-trip from your home) will you take?
Base: All persona respondents. 3,004 completed surveys.

MAXIMUM AMOUNT SPENT ON A HOTEL ROOM

The maximum spent for a hotel room averages \$459 for these travelers. However, each persona has spent more. Not surprisingly, Luxury Travelers (\$711) take the lead while Foodies report the lowest average maximum (\$471).

Figure: Maximum Amount Spent on a Hotel Room



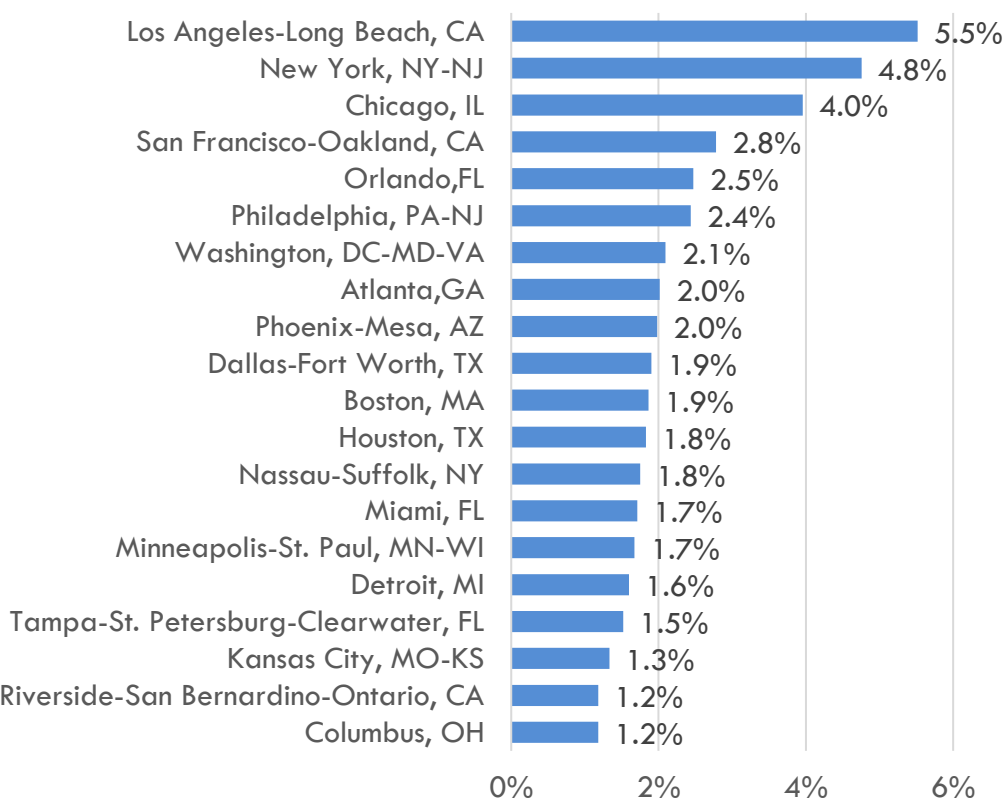
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Max amount spent on a hotel room	\$595.70	\$711.02	\$582.24	\$535.96	\$471.22
Base	787	497	1,196	1,045	2,172

Question: What is the maximum amount you've personally spent on a hotel room?
Base: All persona respondents. 2,679 completed surveys.

The surveyed travelers most commonly live in the Los Angeles/Long Beach area of California (5.5%), but are dispersed throughout several major cities.

Figure: MSA



Question: What is your zip code? .
Base: All persona respondents. 2,628 completed surveys.

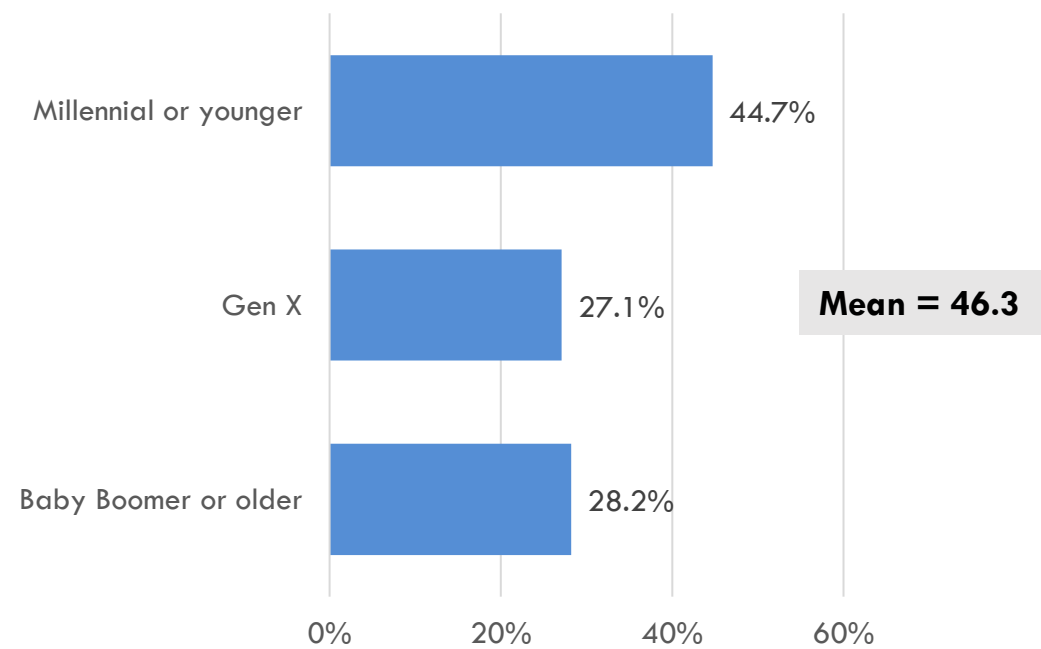
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Los Angeles-Long Beach, CA	7.2%	8.2%	6.9%	6.7%	5.7%
New York, NY-NJ	5.7%	4.8%	5.7%	5.6%	4.7%
Chicago, IL	3.5%	2.7%	3.7%	4.2%	3.9%
San Francisco-Oakland, CA	2.2%	5.4%	2.5%	2.7%	2.7%
Orlando, FL	3.6%	2.1%	3.9%	3.5%	2.7%
Philadelphia, PA-NJ	1.0%	2.7%	1.9%	2.5%	2.4%
Washington, DC-MD-VA	2.2%	2.7%	2.7%	2.1%	2.3%
Atlanta, GA	2.7%	2.9%	3.4%	2.4%	2.2%
Phoenix-Mesa, AZ	1.4%	3.6%	1.5%	1.1%	1.9%
Dallas-Fort Worth, TX	2.5%	2.7%	2.7%	2.9%	1.9%
Boston, MA	2.0%	2.1%	1.9%	1.5%	1.8%
Houston, TX	1.6%	2.3%	2.6%	2.7%	2.0%
Nassau-Suffolk, NY	1.2%	2.3%	1.8%	1.5%	1.6%
Miami, FL	2.3%	1.9%	1.7%	1.8%	1.9%
Minneapolis-St. Paul, MN-WI	2.1%	1.3%	1.2%	1.4%	1.4%

GENERATION

The typical traveler is 46.3 years old. Self-Care Seekers (40.2), and the Wild Bunch (39.0) are the youngest personas. Luxury Travelers are somewhat older (50.6) than other personas.

Figure: Generation



Detail by Persona

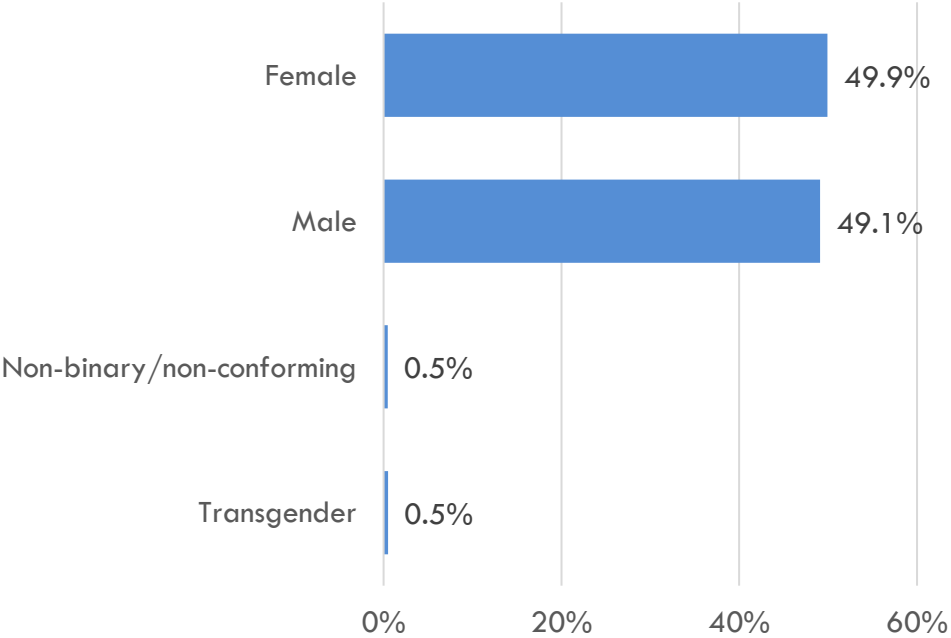
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Millennial or younger	49.0%	35.2%	60.0%	60.5%	47.0%
Gen X	28.2%	27.7%	27.6%	34.8%	26.9%
Baby Boomer or older	22.8%	37.1%	12.4%	4.7%	26.1%
Mean	44.8	50.6	40.2	39.0	45.5
Base	912	566	1,401	1,219	2,432

Question: In what year were you born?
Base: All persona respondents. 3,004 completed surveys.

GENDER

Gender splits nearly evenly overall. Except for Foodies, each persona skews, at least slightly, male.

Figure: Gender



Question: What is your gender?
Base: All persona respondents. 3,004 completed surveys.

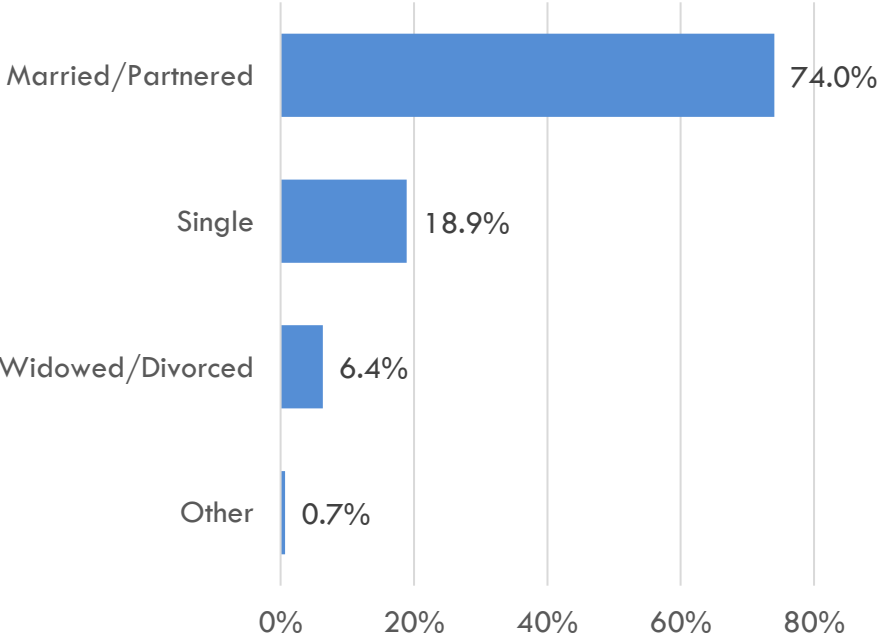
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Female	43.6%	39.8%	45.0%	47.1%	49.6%
Male	55.4%	59.9%	54.0%	52.0%	49.5%
Non-binary/non-conforming	0.4%	0.2%	0.4%	0.5%	0.4%
Transgender	0.5%	0.2%	0.6%	0.4%	0.5%
Base	912	566	1,401	1,219	2,432

MARITAL STATUS

Three-quarters of these travelers are married/partnered (74.0%). Luxury Travelers (84.5%) and the Wild Bunch (86.0%) are the most likely married/partnered personas.

Figure: Marital Status



Detail by Persona

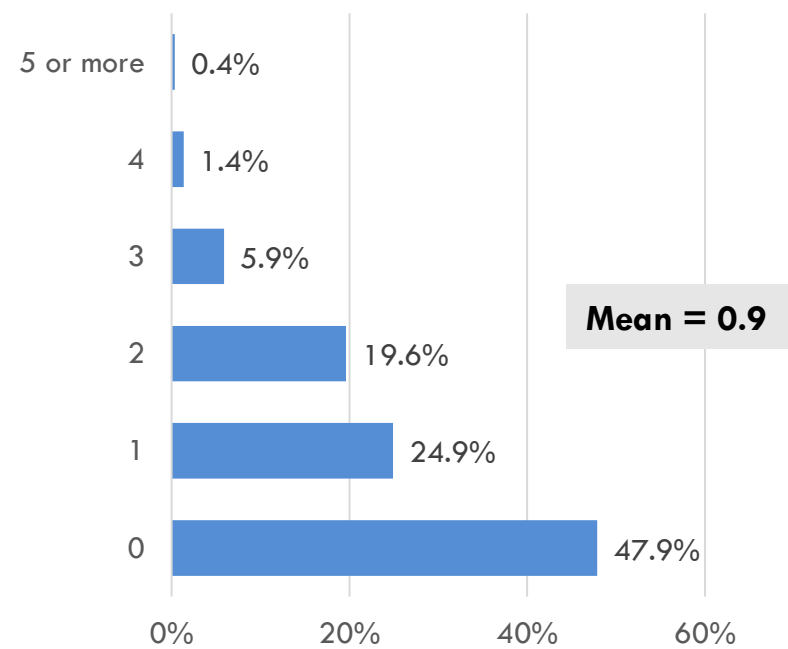
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Married/Partnered	77.6%	84.5%	73.2%	86.0%	73.9%
Single	16.8%	11.7%	21.6%	9.0%	19.7%
Widowed/Divorced	4.5%	3.7%	4.9%	4.6%	5.6%
Other	1.1%	0.2%	0.4%	0.4%	0.7%
Base	912	566	1,401	1,219	2,432

Question: Which best describes your marital status?
Base: All persona respondents. 3,004 completed surveys.

CHILDREN IN HOUSEHOLD

Just over half (52.1%) of these travelers live with children. Except for the older Luxury Travelers (51.4%) and Foodies (52.1%) who nearly match the average, significantly more of each persona lives with children, ranging from Natural History Lovers (59.8%) to the Wild Bunch (100%).

Figure: Children in Household



Detail by Persona

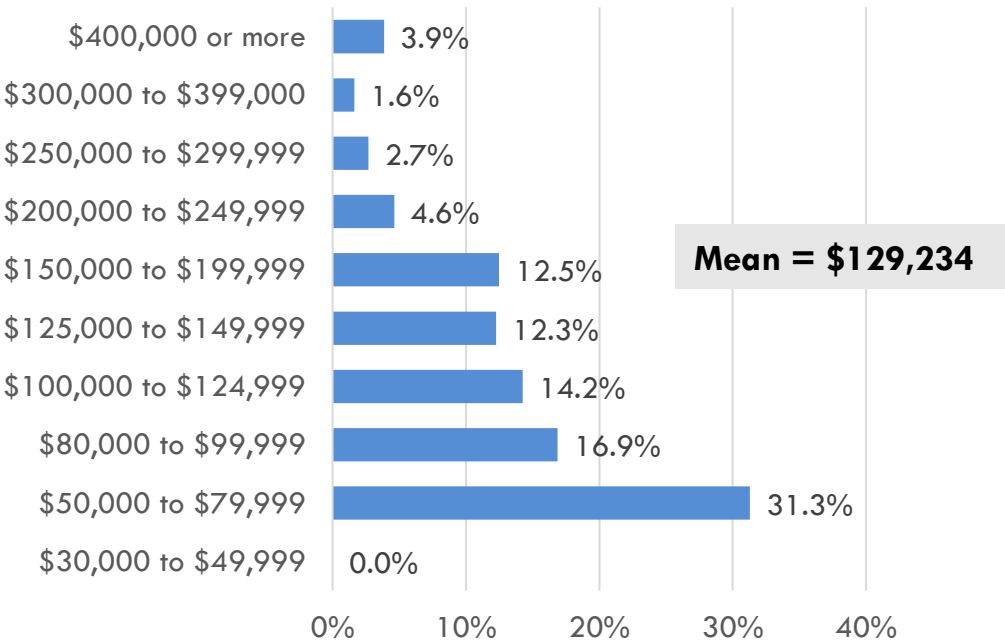
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
5 or more	0.3%	0.5%	0.5%	0.5%	0.3%
4	1.8%	0.5%	1.4%	2.5%	1.3%
3	6.4%	3.0%	7.1%	11.7%	5.9%
2	22.5%	19.6%	26.1%	39.4%	19.7%
1	28.8%	27.7%	31.6%	45.9%	24.9%
0	40.2%	48.6%	33.3%	0.0%	47.9%
Mean	1.0	0.8	1.1	1.7	0.9
Base	912	566	1,401	1,219	2,432

Question: How many children under age 18 live in your household?
Base: All persona respondents. 3,004 completed surveys.

COMBINED ANNUAL HOUSEHOLD INCOME

The average traveler in this study is quite affluent, averaging \$129,234. This level doubles the median U.S. household income (\$67,521 in 2020 from the U.S. Census Bureau) and also exceeds the average for travelers in Destination Analysts' national Coronavirus Travel Sentiment Index Study from September 20 – Oct 1, 2021 (\$81,058). As expected, Luxury Travelers report the highest incomes (\$237,649).

Figure: Combined Annual Household Income



Detail by Persona

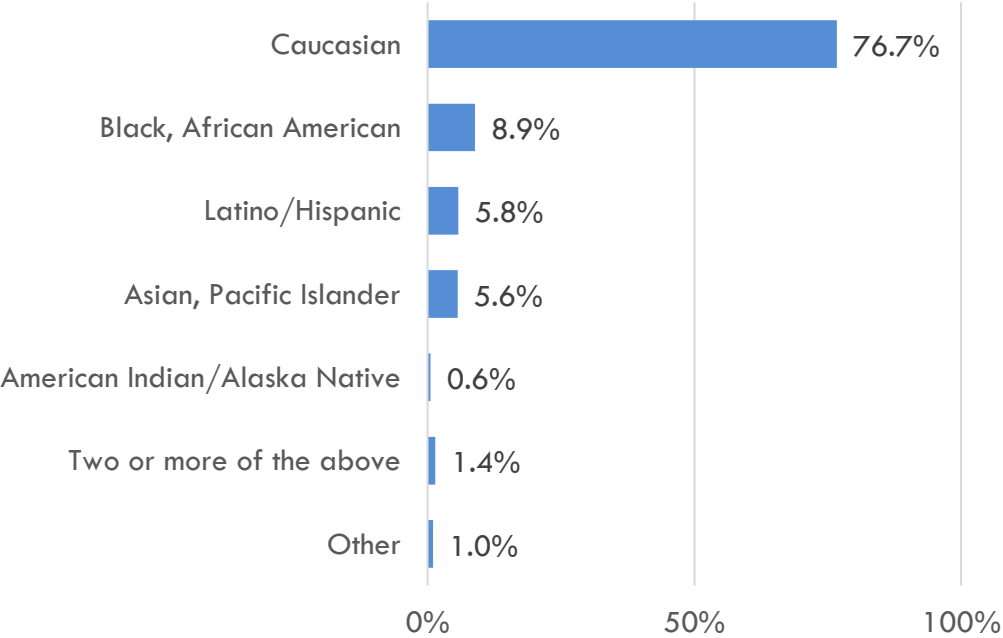
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
\$400,000 or more	6.3%	14.5%	2.6%	3.3%	4.4%
\$300,000 to \$399,000	1.9%	5.5%	1.4%	1.1%	1.8%
\$250,000 to \$299,999	2.5%	11.1%	2.9%	2.1%	2.5%
\$200,000 to \$249,999	4.6%	18.7%	4.5%	4.3%	4.1%
\$150,000 to \$199,999	12.9%	50.2%	11.5%	12.4%	11.3%
\$125,000 to \$149,999	16.7%	0.0%	15.8%	17.0%	12.7%
\$100,000 to \$124,999	12.9%	0.0%	16.0%	14.8%	14.2%
\$80,000 to \$99,999	15.4%	0.0%	15.8%	16.0%	17.5%
\$50,000 to \$79,999	26.9%	0.0%	29.3%	28.9%	31.6%
\$30,000 to \$49,999	0.0%	0.0%	0.1%	0.0%	0.0%
Mean	\$140,204	\$237,649	\$126,898	\$127,685	\$129,046
Base	912	566	1,401	1,219	24,32

Question: Which best describes the combined annual income of all members of your household?
Base: All persona respondents. 3,004 completed surveys.

ETHNICITY

Most of these leisure travelers identify as Caucasian (76.7%).

Figure: Ethnicity



Question: Which best describes your ethnicity?
Base: All persona respondents. 3,004 completed surveys.

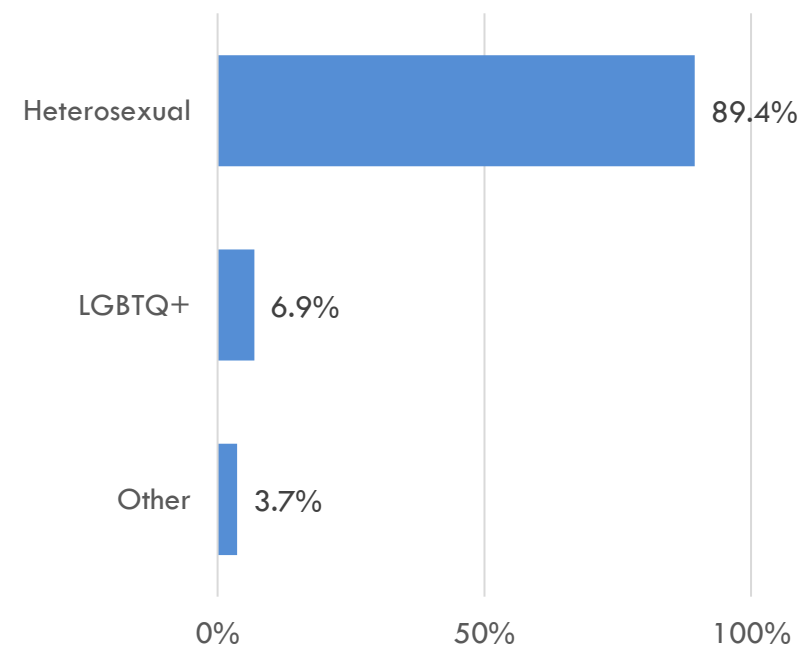
Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Caucasian	78.3%	77.0%	71.9%	77.7%	75.8%
Black, African American	10.2%	11.3%	10.6%	8.0%	9.6%
Latino/Hispanic	5.5%	3.7%	7.4%	7.1%	6.1%
Asian, Pacific Islander	3.9%	5.8%	6.7%	4.3%	5.6%
American Indian/Alaska Native	0.2%	0.0%	0.7%	0.2%	0.6%
Two or more of the above	0.9%	1.1%	1.6%	1.6%	1.4%
Other	1.0%	1.1%	1.1%	1.1%	0.9%
Base	912	566	1,401	1,219	2,432

ORIENTATION

Nine-in-ten (89.4%) are heterosexual.

Figure: Orientation



Detail by Persona

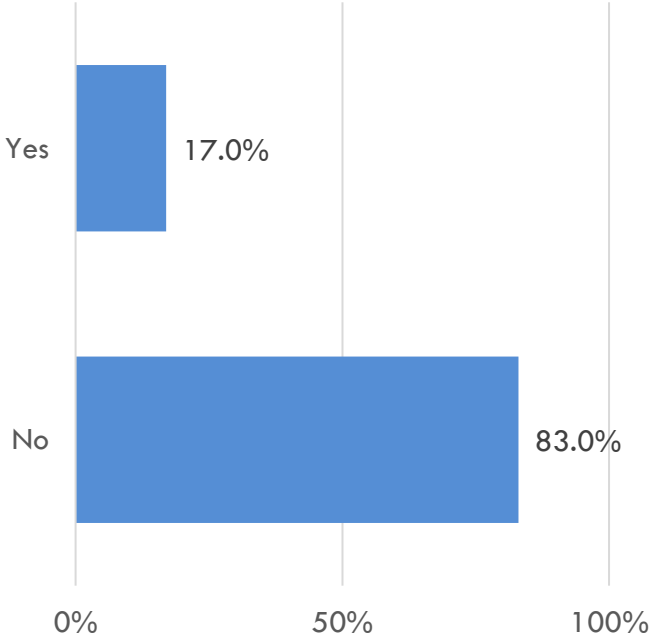
	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Heterosexual	89.3%	90.5%	87.8%	90.4%	89.5%
LGBTQ+	6.8%	6.5%	7.4%	5.3%	6.9%
Other	3.9%	3.0%	4.9%	4.3%	3.6%
Base	912	566	1,401	1,219	2,432

Question: Which best describes you?
Base: All persona respondents. 3,004 completed surveys.

DISABILITY

Most (83.0%) claim no disabilities.

Figure: Disability



Question: Do you face a physical, visual, auditory or cognitive disability?
Base: All persona respondents. 3,004 completed surveys.

Detail by Persona

	Natural History Lovers	Luxury Travelers	Self-Care Seekers	Wild Bunch	Foodies Without Pretense
Yes	23.5%	21.6%	19.2%	18.4%	17.4%
No	76.5%	78.4%	80.8%	81.6%	82.6%
Base	912	566	1,401	1,219	2,432



APPENDIX:

**PROFILE SUMMARY OF AMERICAN TRAVELERS
WHO DO NOT IDENTIFY AS ONE OF
ARIZONA'S HIGH VALUE PERSONAS**



NON-PERSONAS

1,184 COMPLETED SURVEYS.

The summary at right describes the key characteristics of all non-personas, defined as American leisure travelers who do not identify as one of Arizona's high value personas.

KEY CHARACTERISTICS

Characteristics (Non-Personas vs. Personas):

- With more than half of Non-Personas categorized as Baby Boomers, they are significantly older than average leisure (persona-identified) travelers (58.2 years), but still quite affluent (\$122,906). Most are married (73.3%), but comparatively few live with children (23.5%). Although they travel at a near-average- persona level (2.9 leisure trips in past year; 4.3 trips planned next two years), they are frugal, expecting to spend significantly less per day on a trip to Arizona (\$388) than average.

Messaging:

- Arizona appears on the non-persona “radar” much less than for persona travelers. Only half (52.7%) claim any familiarity with Arizona and only one-in-four (27.2%) has visited in the past five years. They complain about the travel time (26.6%), the hot weather (21.2%) and desired experiences (20.9%) as reasons to not visit Arizona. All that aside, Arizona still dominates the Southwest areas they would like to visit (Arizona at 33.5% has built far greater interest than runner-up California at 19.9%).
- They tend to make low-energy vacation choices – relaxing and dining lead their “favorites” list of vacation activities; further, the top high-energy activity (hiking) is cited by only one-in-eight (12.0%).
- Their frugality appears again when rating what is important to them in choosing a destination, with affordability at the top (74.6%). But like most travelers, welcoming destinations (74.3%) and scenic beauty (73.0%) are important features for them.
- The biggest disconnects between what they want and their perception of what Arizona delivers are affordability (a huge gap of 34%-points), welcoming (24%-points), and easy to get to (22%-points). They want to be in a comfortable environment and avoid the stress of complicated travel.
- Many would like to visit Arizona's national parks (51.5%) and historic/archaeological parks (32.9%), their top two activities for Arizona, both at levels similar to average travelers. Plus, they recognize Arizona as an extremely beautiful state (appealing at 68.4% and believable at 68.9%).
- They select “It's 80 Degrees Somewhere” (32.7%) as the best positioning statement.
- To reach them digitally, online searches top the list (36.9%), similar to average (persona) travelers.

NON-PERSONAS *Who they are*



Gender

Female: 53.5%
Male: 45.8%
Non-binary/Transgender: 0.6%



Marital Status

Married/partnered: 73.3%
Single: 12.0%
Children under 18: 23.5%



Average Age: 58.2

Millennial or younger: 18.2%
Gen X: 23.2%
Boomer or older: 58.6%



Ethnicity

Caucasian: 87.7%
Non-Caucasian: 12.3%



Household Income

\$122,906



Physical, Visual, Auditory or Cognitive Disability

Disability: 18.7%



Top MSAs

Honolulu, HI	6.4%	Chicago, IL	3.2%
New York, NY-NJ	3.6%	Minneapolis-St. Paul, MN-WI	2.9%
Philadelphia, PA-NJ	3.3%	San Francisco-Oakland, CA	2.7%

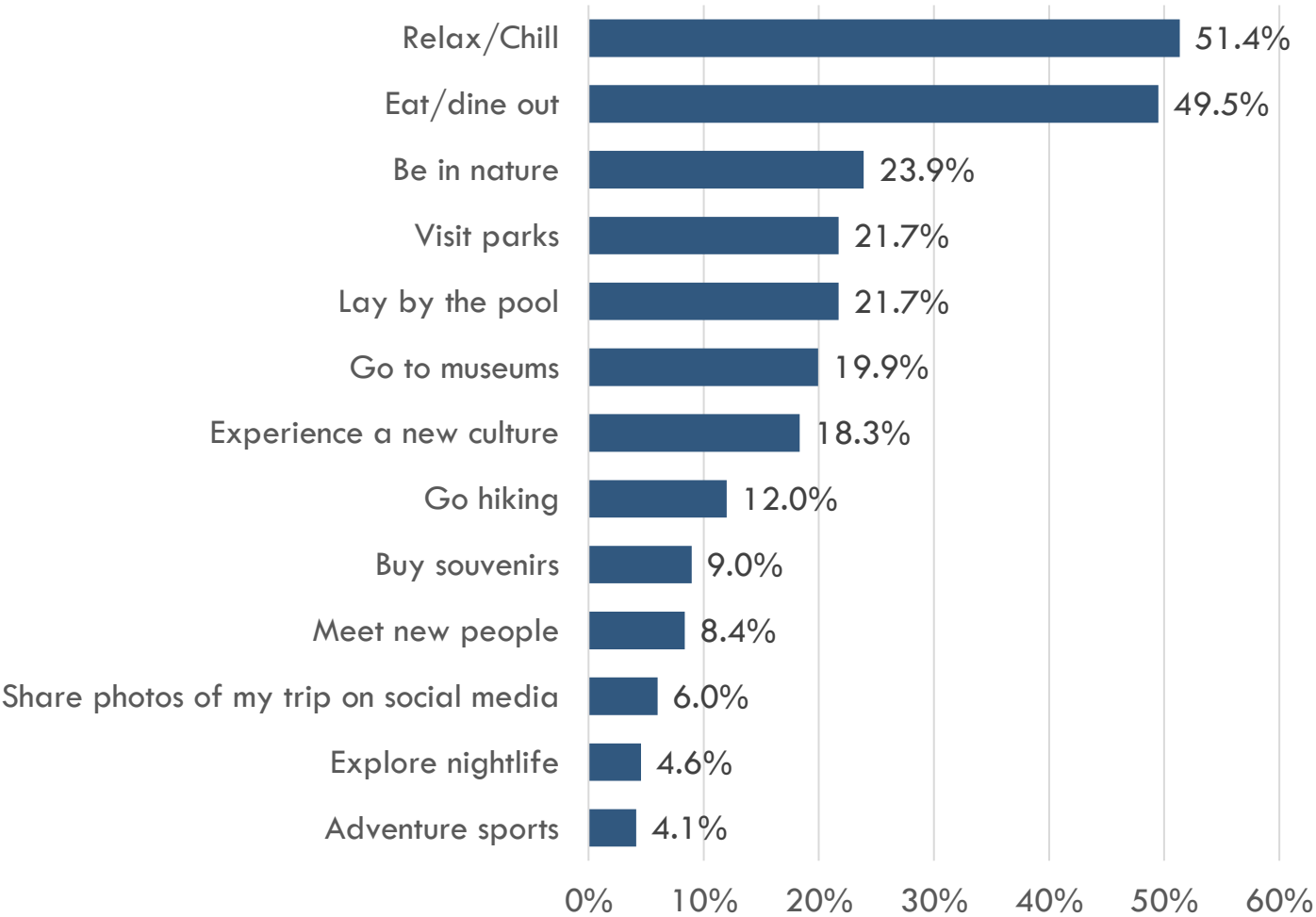


**Average number of
leisure trips in
the past twelve months**

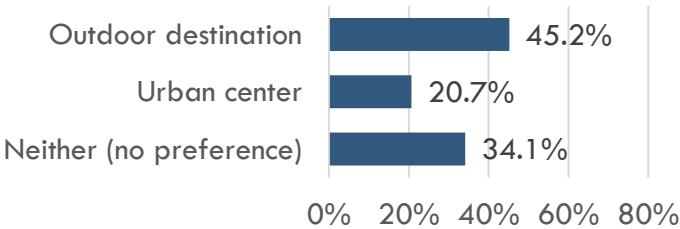


**Average number of
expected leisure trips
in the next two years**

Favorite Things to Do on Vacation



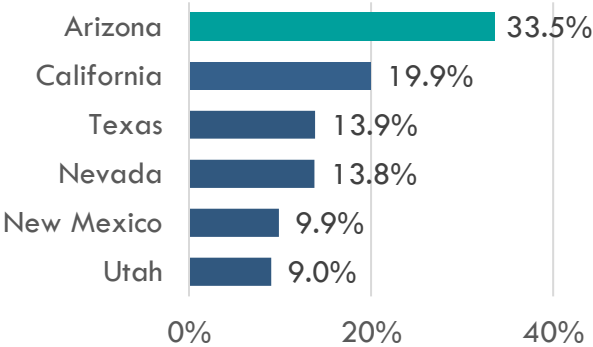
Preference for Outdoor Destination vs. Urban Center



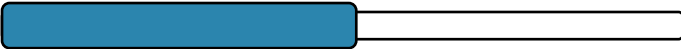
Average Maximum Spend on Hotel Room

\$266.77

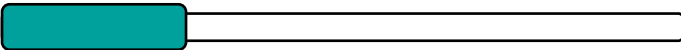
Desired Southwest Destinations to Visit



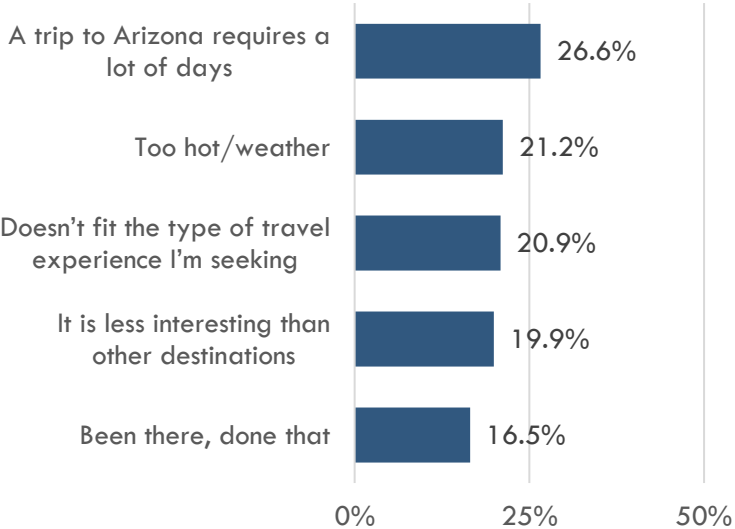
Familiarity with Arizona as a Place to Visit
(Top 3 Box Score—% selecting “slightly familiar,”
“familiar,” or “extremely familiar”) **52.7%**



Visited Arizona in the Past 5 Years **27.2%**



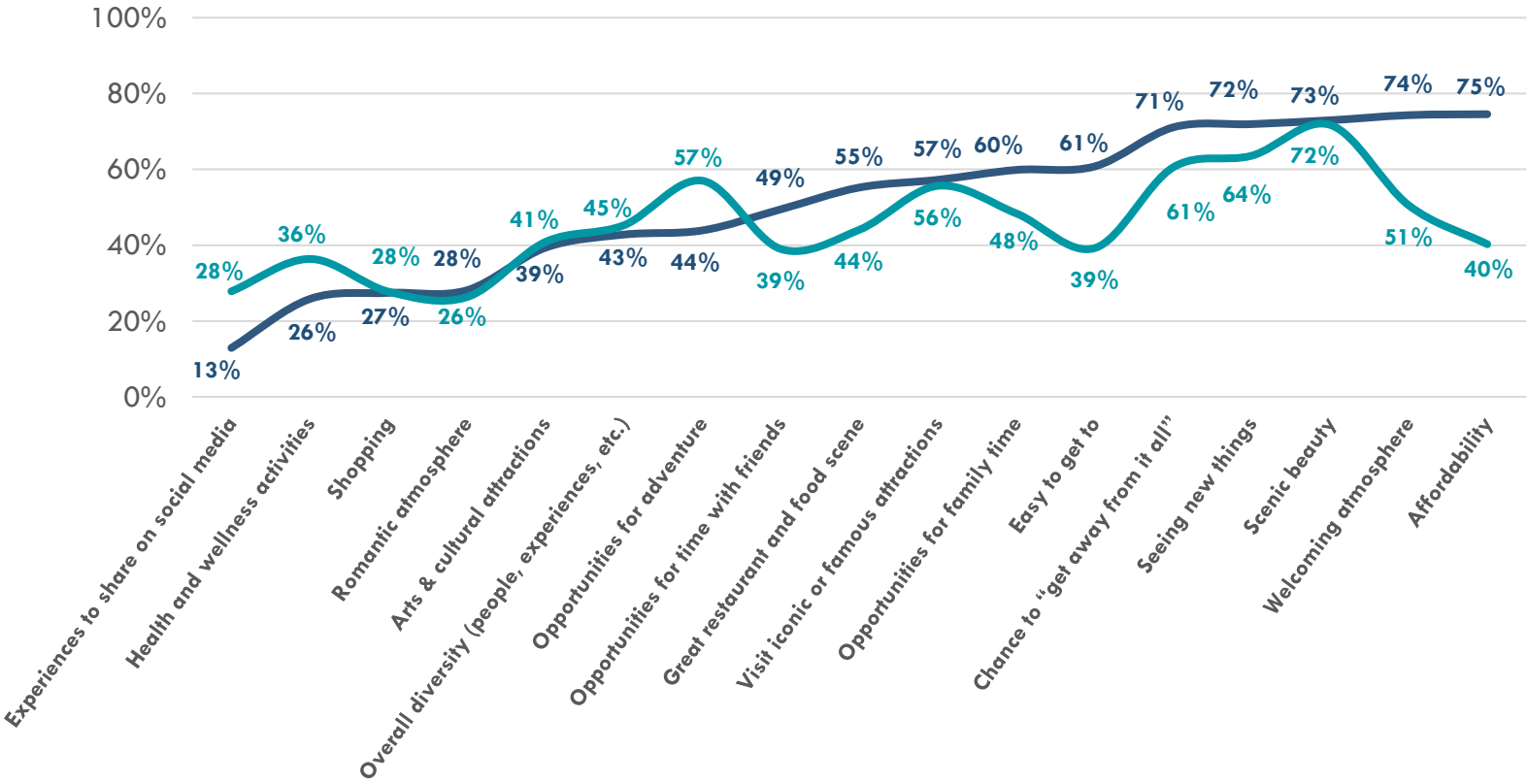
**Top Reasons for
Not Visiting Arizona in the Past 5 Years**
(% of non-recent visitors)



**Important Attributes for Destination Selection vs.
Rating of Arizona's Attributes**

(Top 2 Box Score of those who rated “Important” or “Extremely important” vs.
Top 2 Box Score of those who rated “Good” or “Very good” with Arizona)

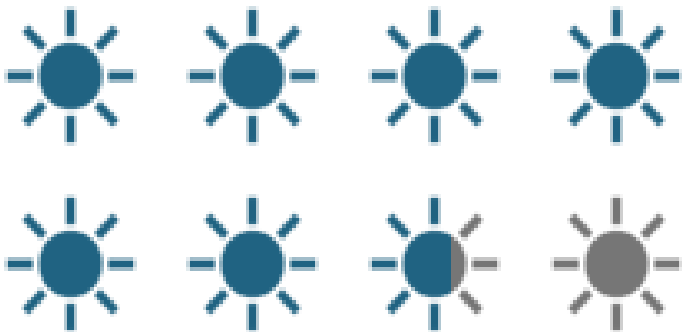
— "Important" or "Extremely important" to Destination Selection
— "Good" or "Very good" with Arizona



Place of Stay

4-star hotels or resorts	38.2%
3-star hotels	35.1%
Budget/limited service hotels	13.4%
Vacation home or other rental	13.0%
5-star hotels or resorts	10.6%

Length of Stay



6.7 Days on Average

Travel Party

Spouse or significant other	70.2%
Friend(s)	14.4%
Other family members	12.6%
Solo/by myself	12.3%
Children 12 and under	10.0%

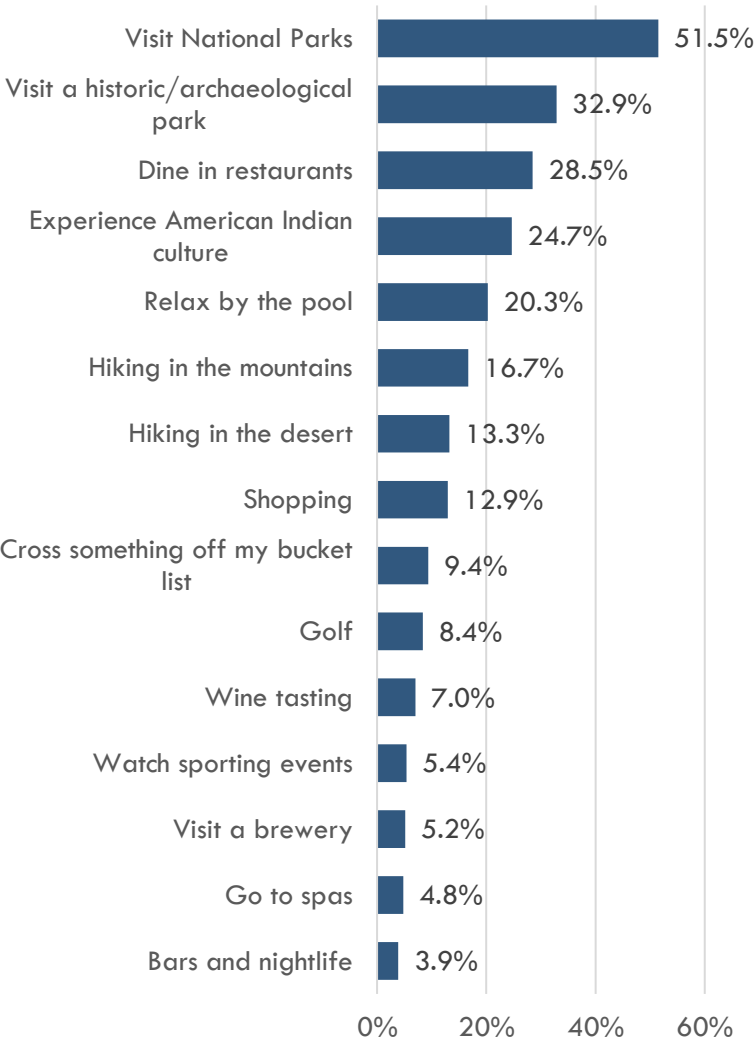
Average Daily Spending



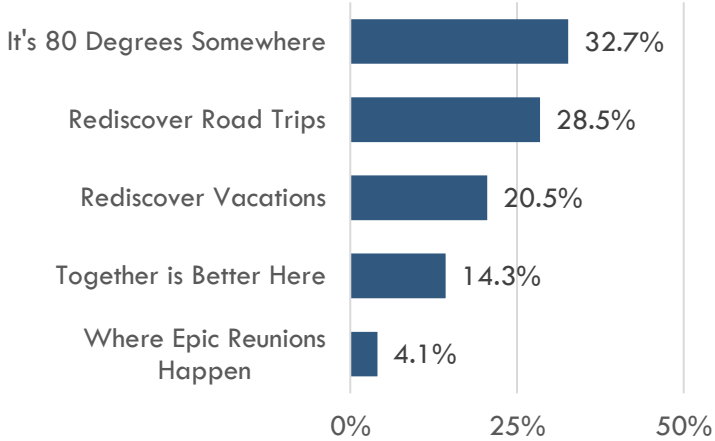
\$387.56

Per Travel Party

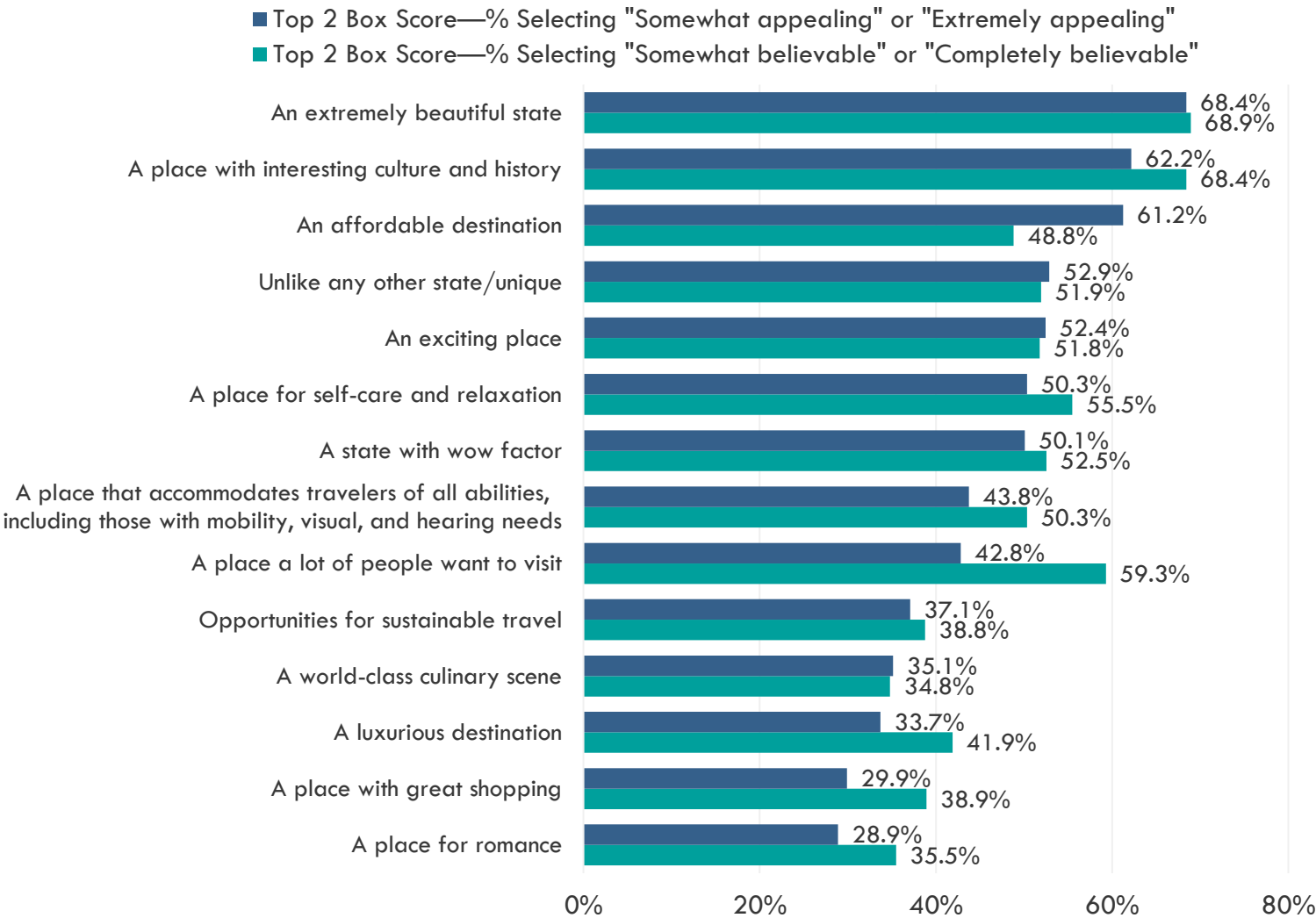
Top Arizona Activities



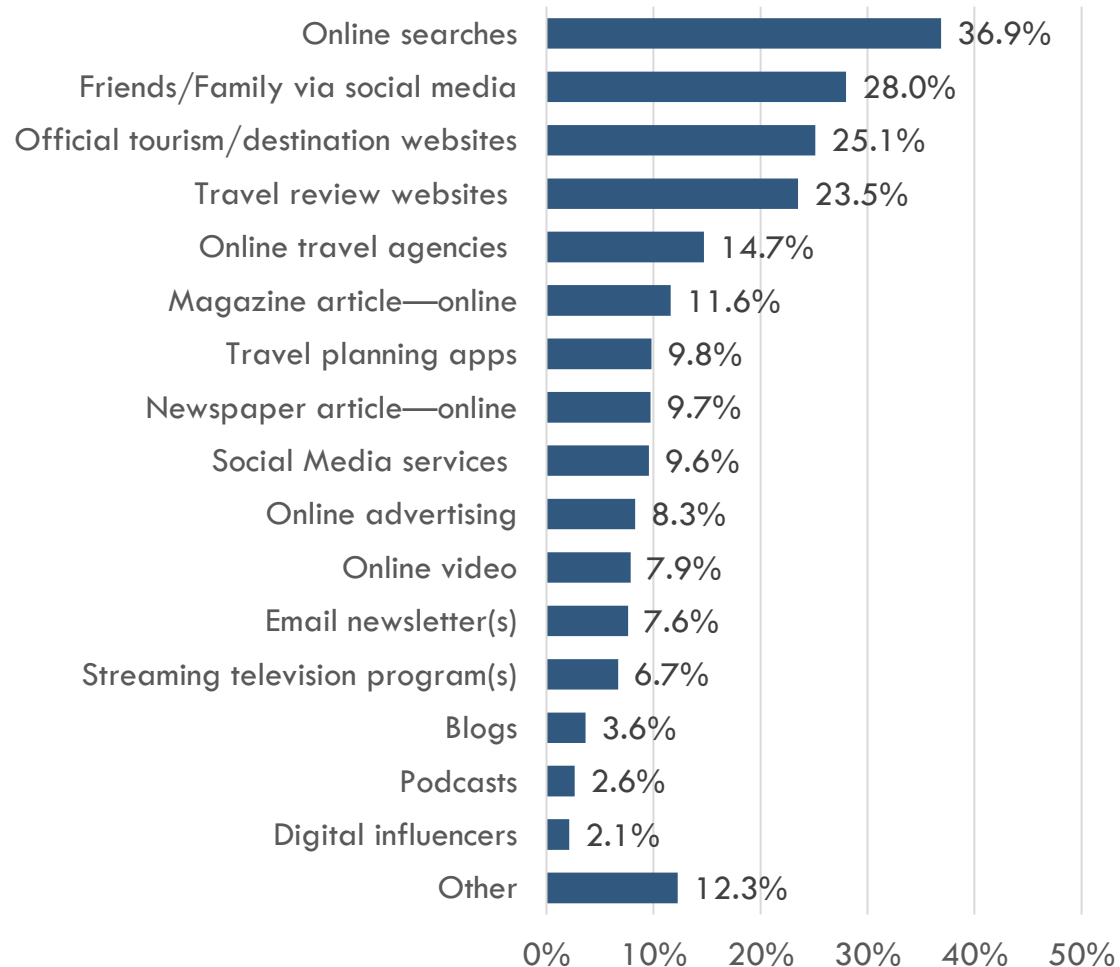
Most Appealing Arizona
Positioning Statements



Most Appealing Arizona Statements vs. Most Believable Arizona Statements



Digital Resources for Travel Ideas and Inspiration



Non-Digital Resources for Travel Ideas and Inspiration

