



Mesa Travel USA 2025 Research Executive Summary

Travel USA®

Who We Are

About Longwoods International



Established in 1978 as
a market research
consultancy

Headquartered in
Columbus, OH, and
Toronto, ON

Working with over 150
destinations and
brands

Specializing in tourism
market research since
1985

Travel USA® Overview

Methodology

Longwoods International began tracking domestic American travelers in 1985 and has conducted large-scale syndicated visitor research quarterly since 1990.

It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.

Each quarter, Longwoods International invites a random, projectable sample of adult members (age 18+) from a major U.S. consumer panel to participate in the Travel USA® survey. Respondents are selected to ensure representativeness of the U.S. adult population.

For analysis, data were weighted on key demographic variables to adjust for any differences between the sample and U.S. population targets derived from the 2020 Census.

Mesa's base size for 2025 overnight & 2024/2025 day trips:

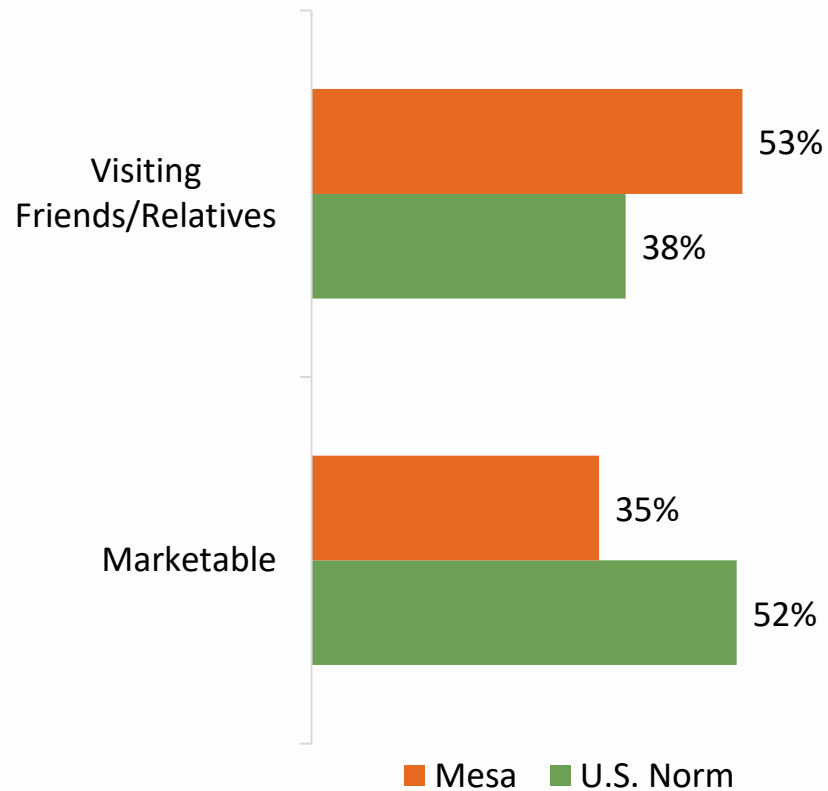
2025 Overnight: 375 2024/2025 Day: 278

This study yields a margin of error of $\pm 3\%$ at a 95% confidence level. Year-over-year (YOY) and U.S. Norm comparisons are considered statistically significant only when results meet or exceed this threshold.

Trip Segmentation

Overnight VFR & Marketable Trips

2025 Overnight Trip Segmentation



Travelers visiting friends and relatives (VFR) represent 53% of overnight trips to Mesa in 2025 (up 2 points year-over-year), while marketable trips account for 35% of overnight trips; broadly flat over recent years for Mesa, but with **higher VFR and lower marketable trip segment rates than the U.S. Norm.**

Length of Stay

Overnight Trips

	2024	2025
1 Night	24%	19%
2 Nights	23%	25%
3-4 Nights	24%	31%
5-6 Nights	13%	11%
7+ Nights	17%	15%

Average Number of Nights in Mesa

2024

4.3 Nights

2025

4.0 Nights

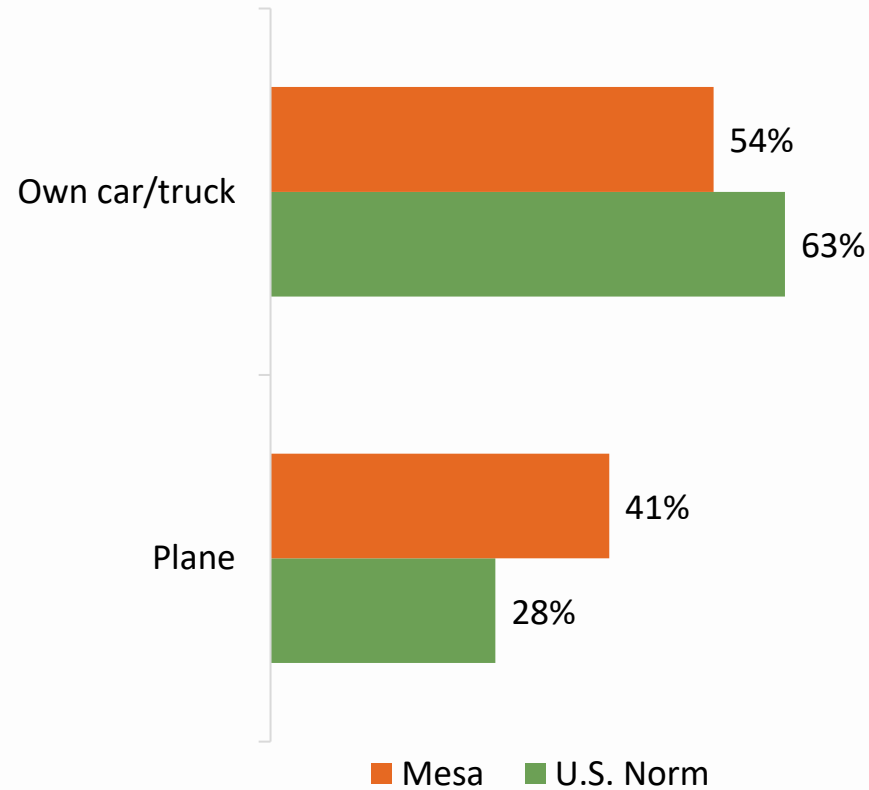
Average overnight length of stay is 4.0 nights in 2025, down from 4.3 in 2024 and driven by a 7-point gain in 3-to-4-night stays (24% to 31%) and a 2-point decline in 7+ night stays (17% to 15%).

However, 1-night stays are at a record low in the 2017–2025 trending data, indicating that even as longer (7+ night) trips soften, **visitors are increasingly extending their Mesa stay beyond a single night.**

Transportation

Overnight Trips

2025 Overnight Transportation to Destination

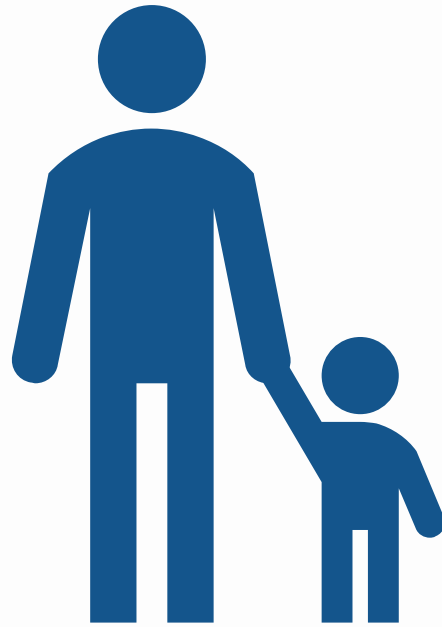


When compared to the U.S. Norm, travelers used their own car/truck to get to Mesa 9 pts less than the U.S. Norm but used a plane 13 pts more than the U.S. Norm, suggesting that **Mesa's traveler base lives further from the area than the average destination.**

Travel Party Composition

Overnight Trips

In 2025, Mesa travelers tended to be older, higher-income, and family-heavy travel parties



Children are present in 36% of overnight travel parties, up 6 points vs. 2024 and surpassing the previous 2017-2025 record high of 34% in 2021, **supporting Mesa's positioning as a growing family-friendly destination.**

Meanwhile, 46% of overnight travel parties had adults aged 55+, and the average household income is \$84k yielding a somewhat **older and more affluent profile** than the U.S. traveler norm while still including a strong family segment.

Travel-Limiting Disabilities

Overnight & Day Trips

Mobility-Limiting Disabilities

Base: Travel Parties with Travel-Limiting Disabilities



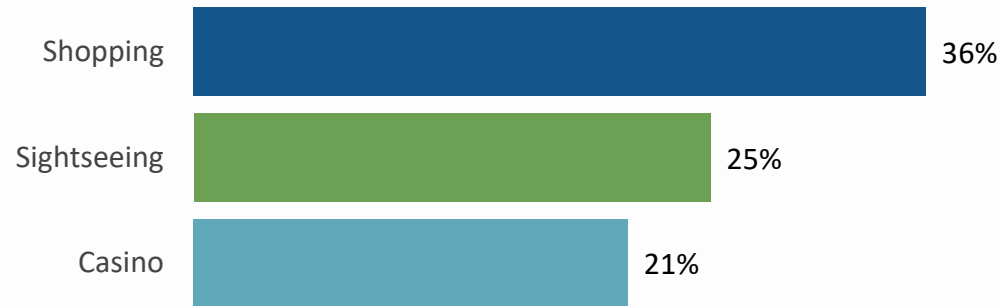
In line with the U.S. Norm, about 16% of overnight and day travel parties report a travel-limiting disability.

In Mesa, approximately 8 in 10 of these are mobility-related, which exceeds the U.S. norm rate of 6 in 10, **underscoring a significant base of travelers with mobility assistance needs.**

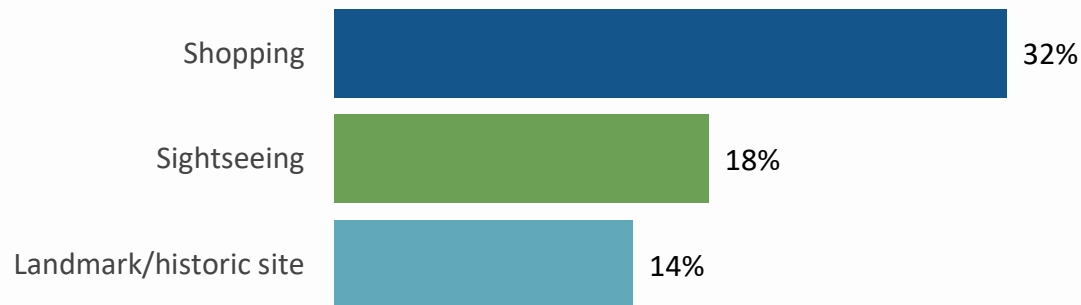
Core Activity Pillars

Overnight & Day Trips

Top 3 Overnight 2025 Activities



Top 3 Day 2024/2025 Activities

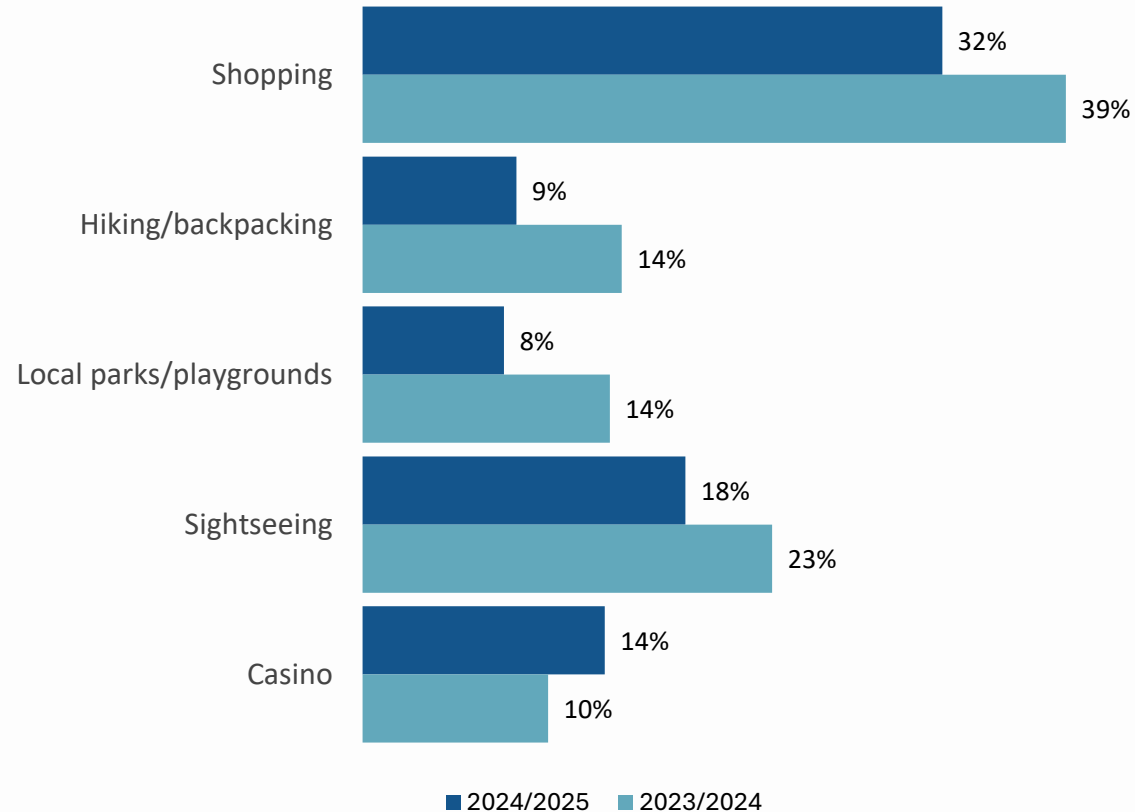


Mesa's leading overnight activities in 2025 are shopping, sightseeing, and casino visits, while day-trip visitors in 2024/2025 most often engage in shopping, sightseeing, and visiting landmarks/historic sites, with casino ranking a close fourth. **Together, these patterns indicate that entertainment-oriented activities are central to travelers' experience in Mesa.**

Shifts in Activities

Day Trips

Top Shifts in Day Trip Activities 2024/2025 vs 2023/2024

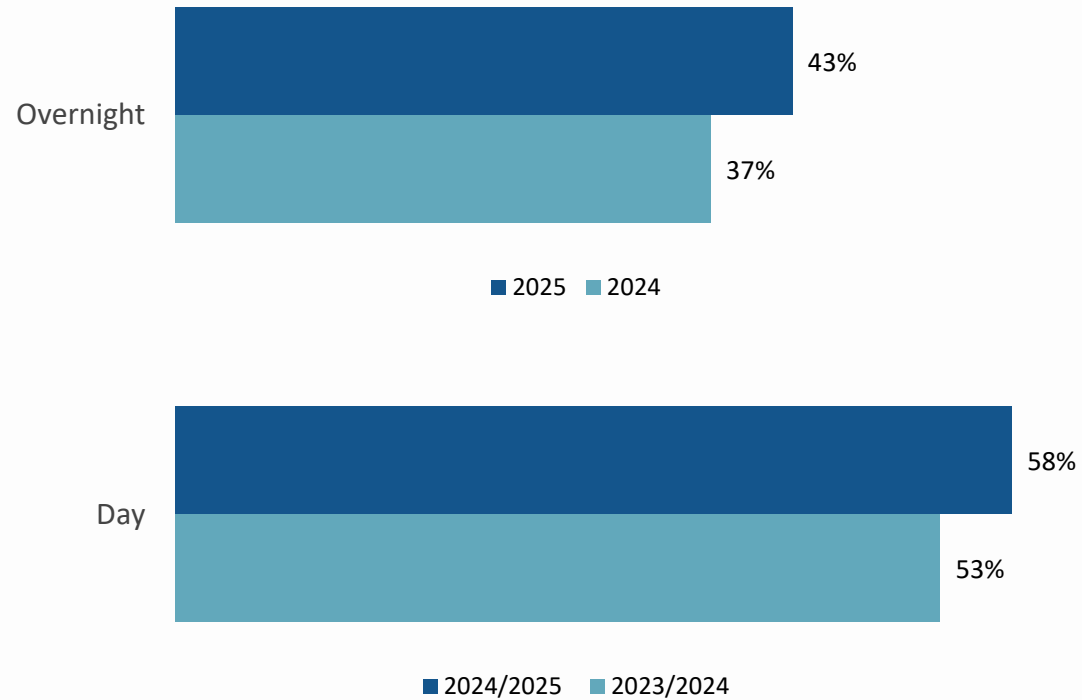


Despite having similar top activities to overnight trips, **day-trip behavior shifted noticeably in 2024/2025 versus 2023/2024**. Shopping participation declined 7 points (from 39% to 32%), hiking/backpacking and visits to local parks/playgrounds each dropped 6 points (from 14% to 9% and from 14% to 8%, respectively), and sightseeing decreased 5 points (from 23% to 18%), while the only marked increase was in casino visits, which rose 3 points (from 10% to 14%).

Shifts in Dining

Overnight & Day Trips

Travelers Who Visited Unique/Local Food Spots in Mesa

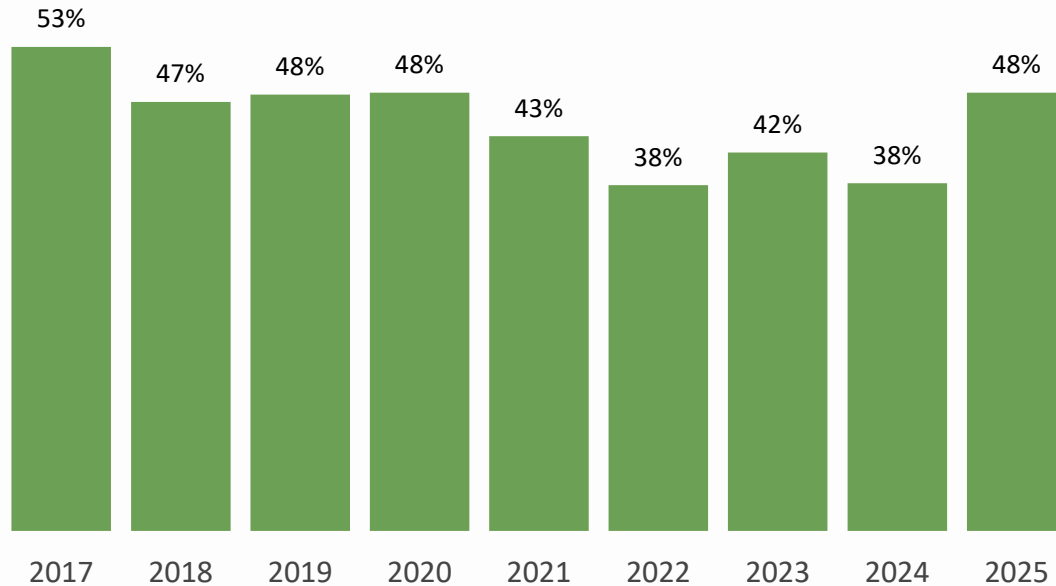


Unique/local food experienced noticeable shifts for both overnight and day (6 point and 5 point increases respectively) and far exceeds the U.S. norm for both trip types, **highlighting local culinary experiences as a key differentiator for Mesa.**

Mesa's Competitive Advantages

Overnight & Day Trip Satisfaction

Travelers Very Satisfied with Value for Money
Overnight Trips to Mesa



"N/A" added as answer option for satisfaction variables in 2020

67% of overnight visitors and 81% of day visitors are very satisfied with their trip, with overall experience, accommodation, food, and sightseeing/attractions for overnight trips all at an average satisfaction rating of 4.5 out of 5.

Value for money averages 4.2 out of 5, with the share of "very satisfied" rising 10 points year-over-year (from 38% to 48%) boosting the average rating back to pre-pandemic levels.

Priority Watchpoints

Mesa Travelers & Budget Friendly Trends



1. The decline in average length of stay from 4.3 to 4.0 nights and the softening of longer (7+ night) trips **may pressure per-trip economic impact** even as satisfaction holds high.
2. Falling participation in day activities such as shopping (-7 points) and sightseeing (-5 points) **suggests that some discretionary, higher-spend activities are being traded down or concentrated in fewer experiences.**
3. VFR accounts for 53% of overnight trips, and 31% of overnight visitors and 38% of day visitors identify as “budget-friendly travelers.” This suggests that Mesa visitors may be particularly cost-conscious, **making the market more vulnerable if prices rise faster than perceived value.**

Strategic Recommendations

Based on Behavioral Insights from Mesa Travelers



1. Despite high shares of budget-friendly travelers, a significant portion of travelers pursue unique/local food, casino experiences, and outdoor recreation, **indicating room to grow higher-yield experiences that travelers still feel are value-aligned.**
2. With 36% of overnight parties including children and 16% reporting a travel-limiting disability, of which more than 4 in 5 are mobility-related, Mesa serves a sizable base of family and mobility-assisted travelers, **making safety, cleanliness, clear wayfinding, and accessible accommodations critical to sustaining satisfaction and repeat visitation.**
3. The move from broad shopping/sightseeing toward more focused experiences (e.g., casinos, local food, select cultural and entertainment offerings) **suggests an opportunity to package and promote short, themed day itineraries that concentrate spend and reinforce Mesa's distinctive assets.**

