Scottsdale Facility Usage Study

Understanding Resident and Visitor Use

Prepared for

CITY OF SCOTTSDALE

May 2024 (rev)

PLACE|BALANCE

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1. Project Objective

The City of Scottsdale engaged Clarity of Place to apply PlaceBalance, a proprietary diagnostic tool for destination management to assess visitor flows at two venues in the city and in Old Town.

One of the actions recommended in the recently adopted Tourism and Events Strategic Plan is for the city to look at ways "to balance visitor and resident access to city-owned facilities and public spaces for events, and align festivals and events with resident and visitor aspirations."

This assessment provides context for the city in identifying tactics to implement the recommendation, as well as to inform the implementation of other strategies of the Tourism and Events Strategic Plan.

Key Project Tasks

- Organize visitor data and show visitor flows at the three points of interest (POI) throughout the year

- Identify times or places where resident use of the POI is limited or negatively impacted by visitor use

- Demonstrate the differences in travel behavior of visitors and residents based on data sets available to the City of Scottsdale and Experience Scottsdale.

- Provide proof points or messaging to validate the Tourism and Events Department's and Experience Scottsdale's current efforts to leverage events to generate visitor activity in the city

- Provide trend data to illustrate market forces that are adding to or exacerbating resident concerns with tourism and event activity in the city

Methodology

1. Develop three case studies to demonstrate the impact of tourism and events in Scottsdale

2. Provide a high-level market context for the area surrounding the studied venues

3. Analyze CoStar, Datafy, and Placer.ai data and map visitor and resident use of the three points of interest

4. Compare visitor flow and times/areas of congestion with community sentiment provided during the Strategic Plan building process

5. Draw insights from the visitor travel patterns before and after studied events to inform the City of Scottsdale's implementation of the Tourism & Events Strategic Plan

Assumptions and Definitions

- Resident or "local": Visitors as tracked in Datafy and Placer.ai within a 50 mile radius of the point of interest

- Non-local visitor: Visitors as tracked in Datafy and Placer.ai beyond 51 miles of the point of interest

- Event visitation is tracked for 2023 event dates

- Resident sentiment is based on the community survey fielded during the planning process

Experience Principles

The Tourism and Events Strategic Plan offers eight key "experience principles" to guide and inform the planning, management, and marketing of Scottsdale as a destination.

The assessment of venue usage was undertaken to inform the **Community Well-Being** principle specifically; however, understanding the visitor flows through the case studies adds more context to the **Festivals & Events** and **Placemaking & Entertainment** principles.

Scottsdale
Tourism & Events
Strategic Plan

1 Community Well-Being

Scottsdale is a place where people live well, get well, and where well-being is defined by not only our own personal physical, spiritual and mental health, but also the health and well-being of the environment and our community.

2 Culture & Creativity

Scottsdale isn't just a place where arts and culture are consumed but created, celebrated, and developed as one of the West's most vibrant arts and culinary scenes.

3 Festivals & Events

Already home to world-class outdoor events, Scottsdale develops and offers indoor facilities to host and welcome the world throughout the year.

4 Meetings & Events

With more than 25% of professionals working remotely in the future, Scottsdale is the destination of choice in the West where companies bring employees and clients together for corporate gatherings, meetings, and events.

5 Outdoor Pursuits

Our natural environment is our most valuable resource. Scottsdale enhances and improves access to these natural assets while reducing the environmental footprint of the tourism industry to protect our natural resources for generations to come.

6 Placemaking & Entertainment

Old Town is the beating heart of the Scottsdale experience – a center for shopping, dining, culture, nightlife, and community gatherings. Old Town and other community centers welcome celebrations throughout the year.

7 Sports Tourism

Scottsdale is a place where people love to play – from amateur sports to collegiate and professional sports, as well as competitions year-round.

8 Travel & Hospitality

As much as Scottsdale cares for its residents and visitors, we care for the people that invest and work in our industry too.

The growing consumer demand for travel also brings added challenges locally increasing pressure on communities and the environment.

—Scottsdale Tourism & Events Strategic Plan

2. Community Context

To understand the context in which local and non-local visitors are accessing Scottsdale's event venues, Clarity of Place reviewed:

- Historic population and visitor profile data;

- Overall visitor volume and non-local visitor patterns in 2023; and

- Resident perspectives of tourism.

This holistic view of the community provides a backdrop of Scottsdale's visitor economy and suggests that market forces other than tourism may be coloring the community's perspectives of the impact of tourism and the balance among local and non-local visitors' use of city venues.

The data also illustrates visits to Scottsdale's defined Points of Interest by local visitors.
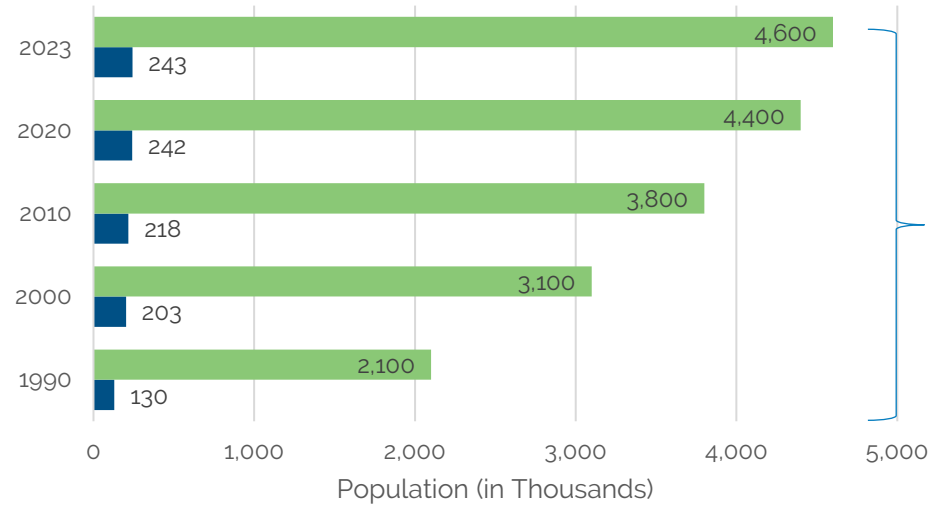
Population Growth

Maricopa County and the City of Scottsdale witnessed tremendous population growth since 1990, growing roughly 28% and 23%, respectively over each decade. In comparison, the US population averaged 10% growth over each decade.

Since 2020, the county's population has increased more than 1.5 million; Scottsdale's population increased by approximately 40,600 over the same period.
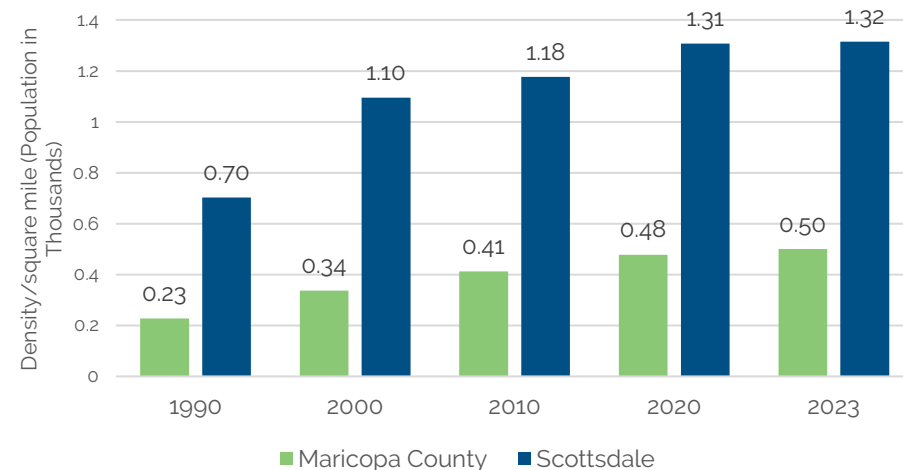
Concurrent with the population growth in the county and city, population density in each jurisdiction has risen. Since 2020, the population density in Maricopa County has risen from 340 people/square mile to 480 people/square mile (an increase of nearly 42%); in Scottsdale, population density rose from 1,100 people/square mile to 1,310 people/square mile (an increase of 19%).

Population Growth

Year	Maricopa County	Scottsdale
2023	4,600	243
2020	4,400	242
2010	3,800	218
2000	3,100	203
1990	2,100	130

Population (in Thousands)

- Scottsdale's compound decennial growth rate was 23% from 1990-2020
- Maricopa County's compound decennial growth rate was 28% from 1990-2020
- The US National Average
- compound decennial growth rate was 10% from 1990-2020

Population Density

Year	Maricopa County	Scottsdale
1990	0.23	0.70
2000	0.34	1.10
2010	0.41	1.18
2020	0.48	1.31
2023	0.50	1.32

Density/square mile (Population in Thousands)

■ Maricopa County ■ Scottsdale

Source: World Population Review

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Visitor Profile

Longwoods International's nationally syndicated Travel USA® research provides a profile of visitors to Scottsdale and indicates overnight and day visitor behavior before and during the trip.* Travel USA® Visitor Profiles are based on a nationally syndicated survey of more than 250,000 trips annually.
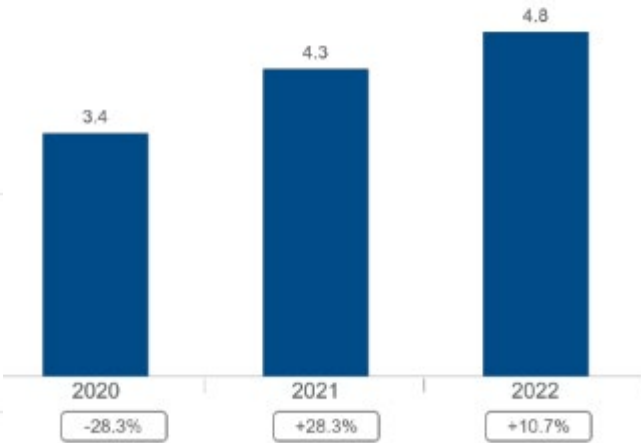
The Scottsdale Visitor Profile in 2022 indicates that more than 1/3 of visitors travel to Scottsdale to visit friends or relatives; 9% travel to attend a special event, and that there were 4.8 million overnight trips to the city in 2022.

Other highlights included in the report, are that 76% of overnight travelers are return visitors and that 53% of overnight travelers had visited Scottsdale within the past 12 months.

Main Purpose of Trip

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

Overnight Trips to Scottsdale

2020	2021	2022
3.4	4.3	4.8
-28.3%	+28.3%	+10.7%

*An overnight visitor is defined as one who took a journey for business or pleasure, outside their community and not part of their normal routine, where they spent one or more nights away from home.

A day visitor is defined as one who took any journey for business or pleasure, outside their community and not part of their normal routine, that did not include an overnight stay and included traveling more than 50 miles from home.
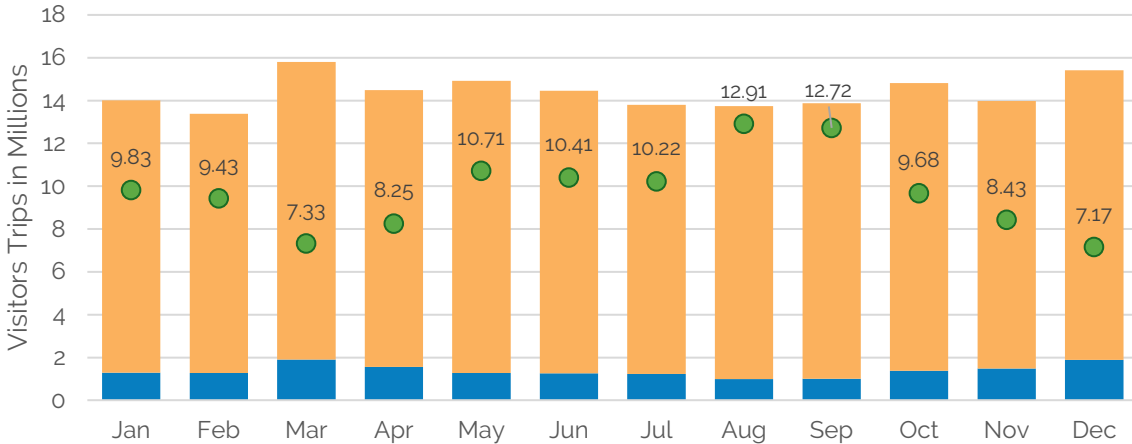
Source: Longwoods 2022 Travel USA

Visitor Volume

To document the balance between local and non-local use of Scottsdale's points of interest (POIs)—including event facilities, Old Town, and other visitor-facing assets)— Clarity of Place organized visitor data from Datafy to understand visitor flows in 2023.
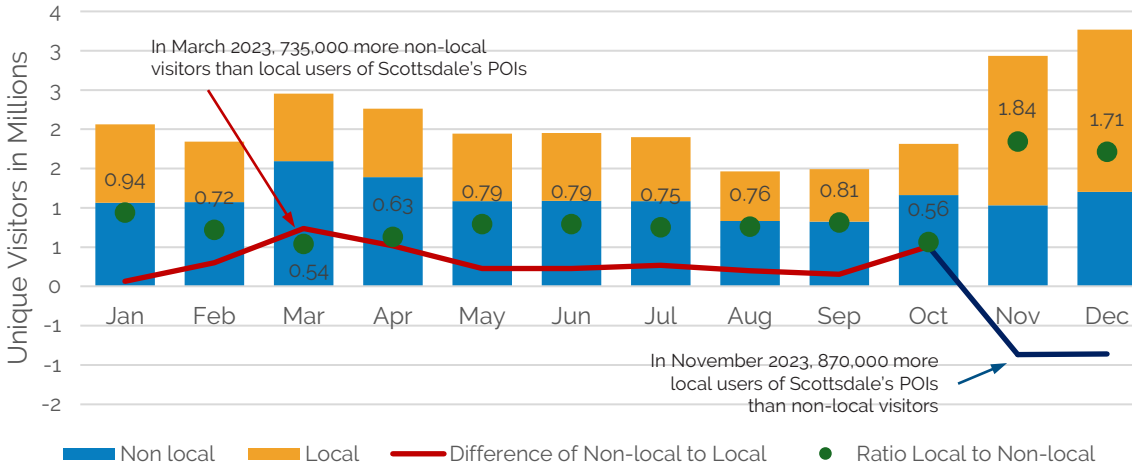
As measured by **Visitor Trips**, trips to Scottsdale points of interest by local visitors outnumbered trips by non-local visitors from more than 7 to 1 in March to nearly 13 to 1 in August. This data point makes sense in that local visitors are most likely to visit Scottsdale's points of interest several times throughout the year.

When tracking use of Scottsdale's points of interest by **Unique Visitors**, non-local visitors outnumbered local visitors on average throughout the year. Non-local visitors outnumbered local visitors most in March, April and October.
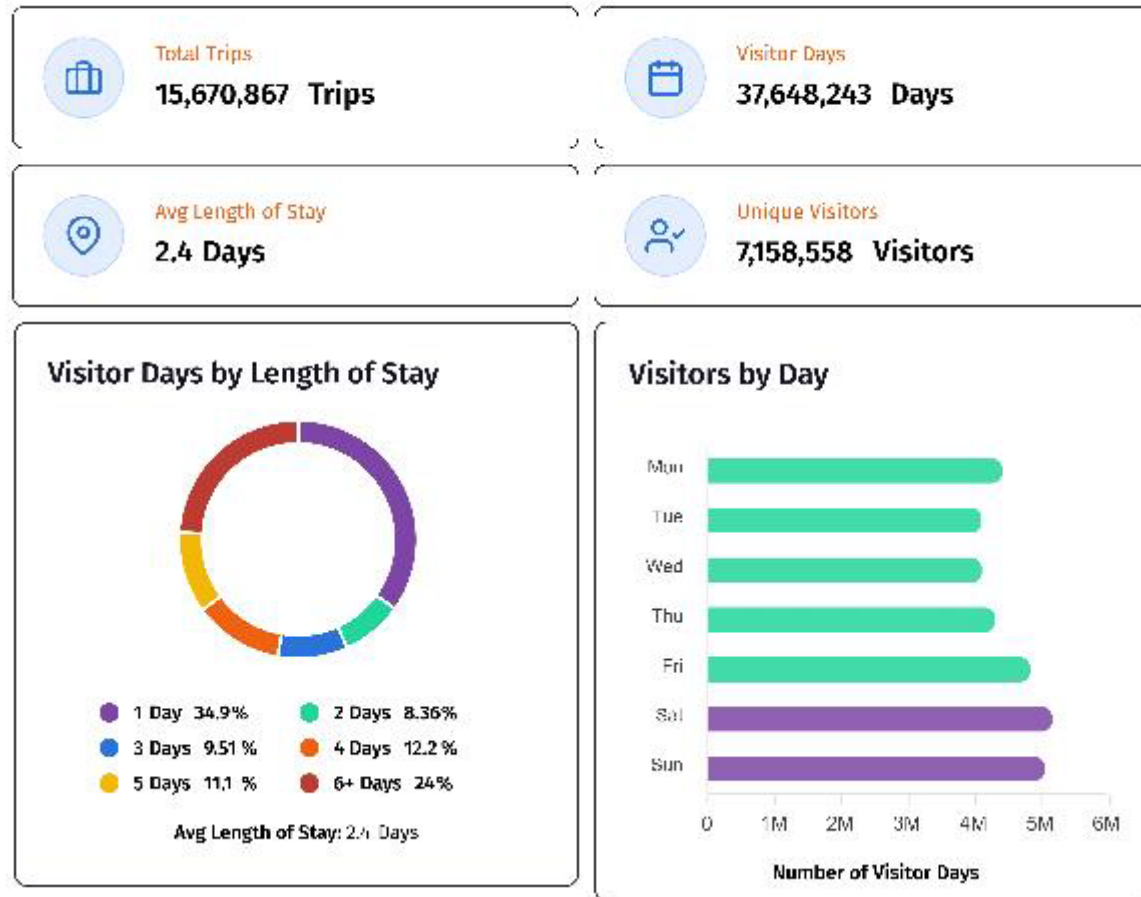
Visitor Trips

Visitors Trips in Millions

9.83, 9.43, 7.33, 8.25, 10.71, 10.41, 10.22, 12.91, 12.72, 9.68, 8.43, 7.17

Unique Visitors

Unique Visitors in Millions

In March 2023, 735,000 more non-local visitors than local users of Scottsdale's POIs

0.94, 0.72, 0.54, 0.63, 0.79, 0.79, 0.75, 0.76, 0.81, 0.56, 1.84, 1.71

In November 2023, 870,000 more local users of Scottsdale's POIs than non-local visitors

Non local   Local   Difference of Non-local to Local   ● Ratio Local to Non-local

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Source: Datafy, for all Superclusters, January 1-December 31, 2023

Non-Local Visitor Patterns

In 2023, Scottsdale welcomed nearly 7.2 million visitors whose home address was more than 51 miles from the city ("non-local" visitors).

Non-local visitors stayed in the city for an average of 2.4 days. Weekend days (Friday – Sunday) saw the heaviest traffic.
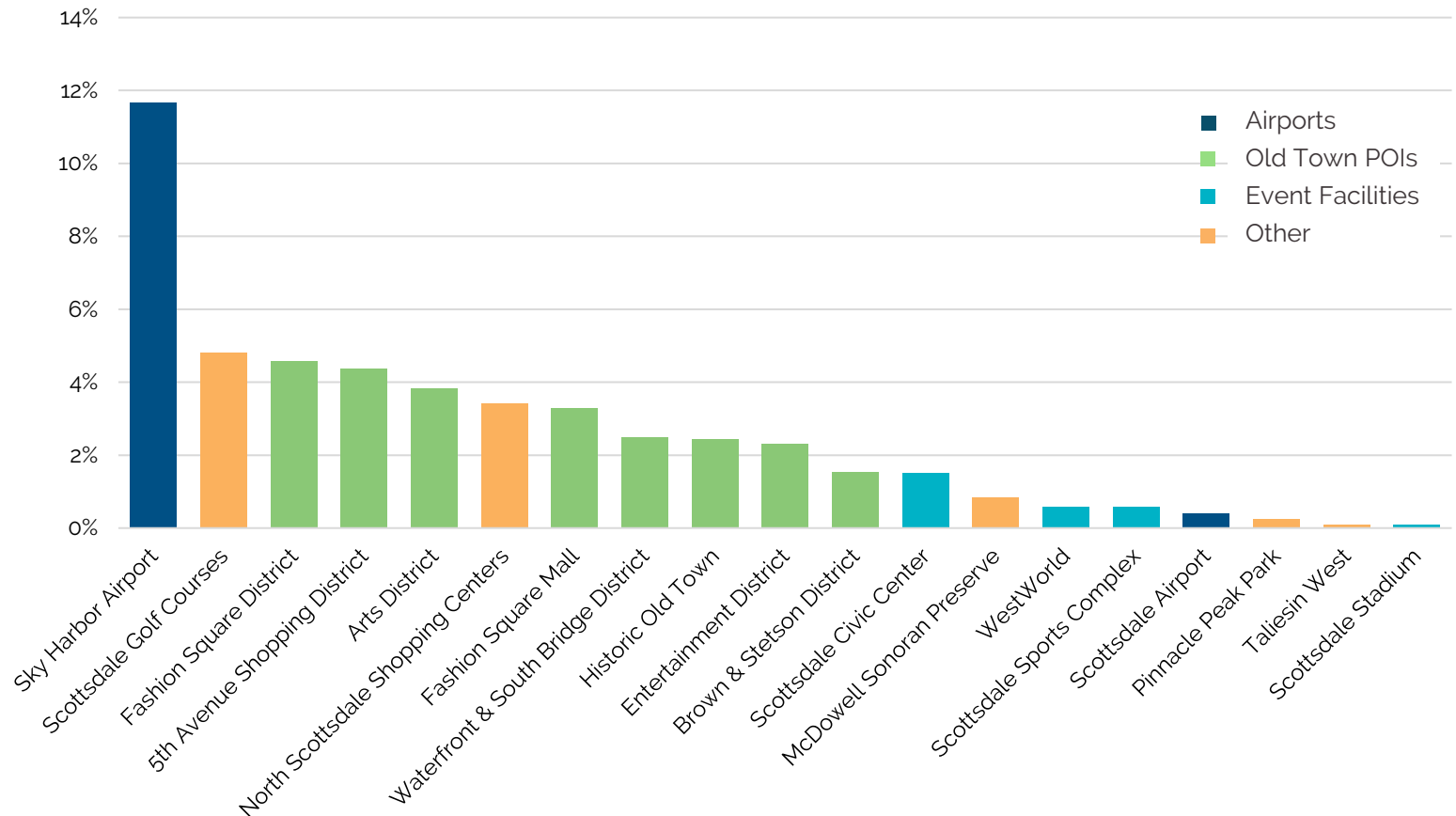
Total Trips
15,670,867 Trips

Visitor Days
37,648,243 Days

Avg Length of Stay
2.4 Days

Unique Visitors
7,158,558 Visitors

Visitor Days by Length of Stay

1 Day 34.9%
2 Days 8.36%
3 Days 9.51 %
4 Days 12.2 %
5 Days 11.1 %
6+ Days 24%

Avg Length of Stay: 2.4 Days

Visitors by Day

Mon
Tue
Wed
Thu
Fri
Sat
Sun

0 1M 2M 3M 4M 5M 6M

Number of Visitor Days

Source: Datafy, visitors with home addresses 51+ miles from Scottsdale, Jan 1 – Dec 31, 2023

Non-Local Visitor Patterns

Datafy's POI Correlation tool is able to track the points of interest where non-local visitors to the City of Scottsdale were observed during their visit.

After Sky Harbor International Airport, Scottsdale Golf Courses and POIs in Old Town garnered the largest percentage of visits from non-local visitors.

Average Correlation

Legend:
- Airports
- Old Town POIs
- Event Facilities
- Other

Categories (left to right): Sky Harbor Airport, Scottsdale Golf Courses, Fashion Square District, 5th Avenue Shopping District, Arts District, North Scottsdale Shopping Centers, Fashion Square Mall, Waterfront & South Bridge District, Historic Old Town, Entertainment District, Brown & Stetson District, Scottsdale Civic Center, McDowell Sonoran Preserve, WestWorld, Scottsdale Sports Complex, Scottsdale Airport, Pinnacle Peak Park, Taliesin West, Scottsdale Stadium
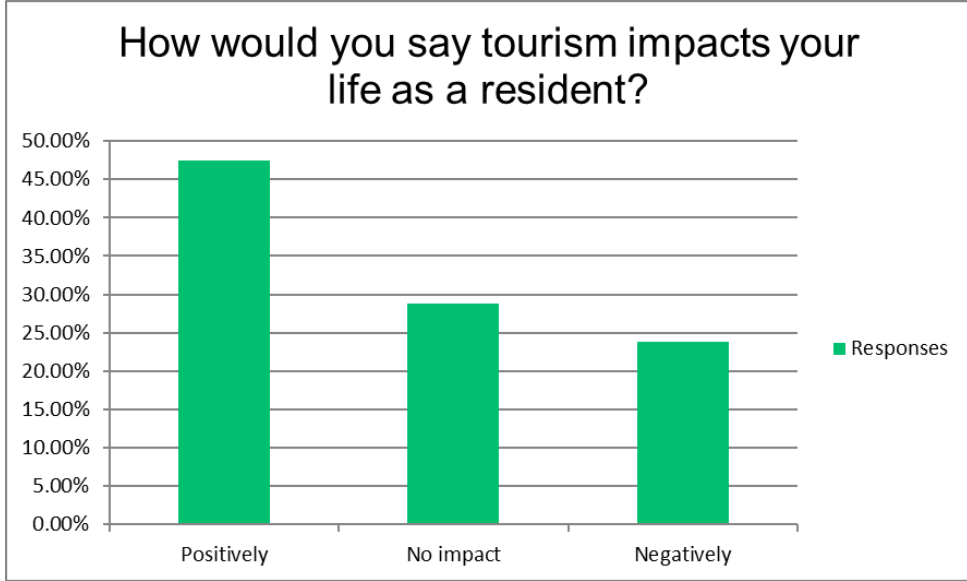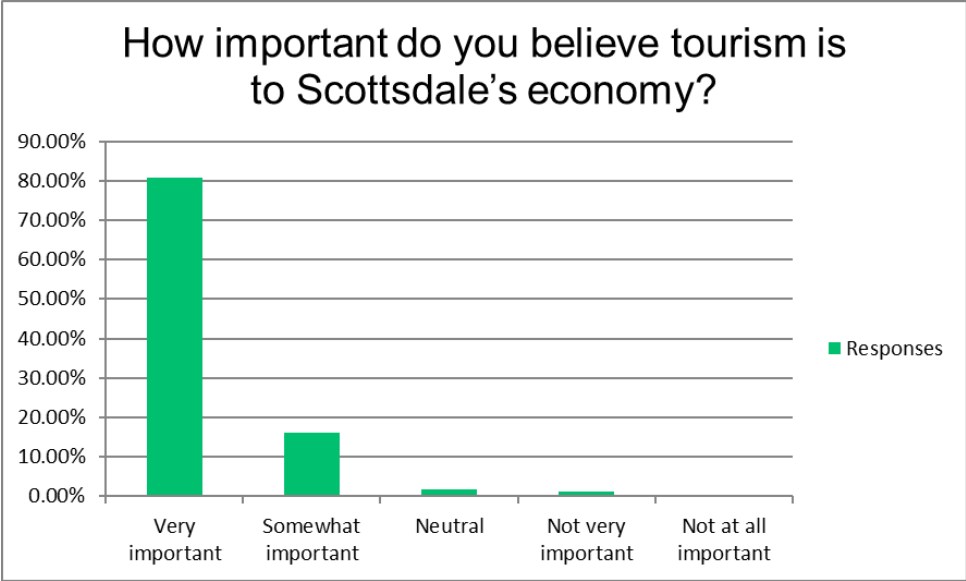
Source: Datafy, POI Correlation tool, January 1-December 31, 2023. Scottsdale *Hotels and POIs outside of the city limits were excluded from the correlation.*

Community Sentiment

As part of the research for the Tourism and Events Strategic Plan, Resonance fielded a "Community Survey" that netted more than 2,000 responses.

A large majority of respondents (96.7%) recognize that tourism is a "somewhat important" or "very important" part of the city's

economy. Less than half of the respondents (47.4%) believe that tourism positively impacts them. The percentage of respondents who feel tourism does not impact them is higher than those who believe that tourism has a negative impact on residents (28.8% and 23.4%, respectively).

How important do you believe tourism is to Scottsdale's economy?

How would you say tourism impacts your life as a resident?
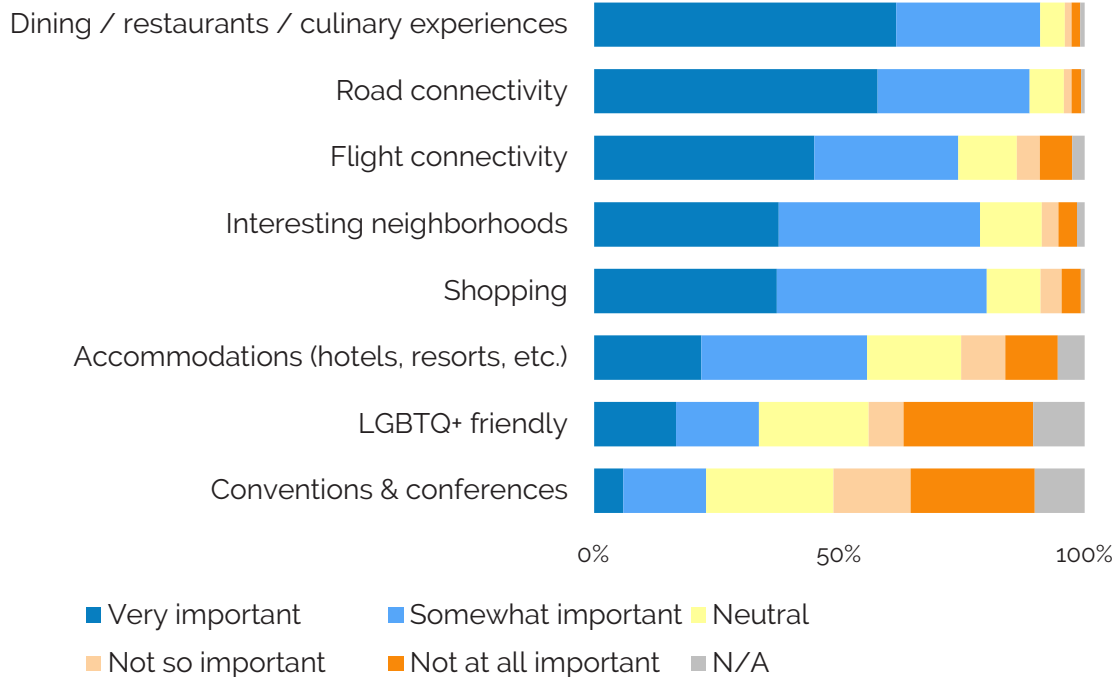
Important Quality of Place

The "Community Survey" asked respondents to indicate which aspects of Scottsdale were important in their decision to live/work in the city.

The two aspects that received the most "agree" and "strongly agree" scores were culinary experience and road connectivity (transportation networks). The aspect receiving the lowest number of "agree" and "strongly agree" scores is "Convention & conferences."

The majority of respondents to the survey are annual residents of the city (92%), with nearly half (45%) of those having lived in Scottsdale for more than 20 years.

The three aspects receiving the most "very important" and "somewhat important" scores are shared by the visitor economy.

Which following aspects were (are) important to you in deciding to live / work / study in Scottsdale? (rate each aspect)

Chart categories (top to bottom):
- Dining / restaurants / culinary experiences
- Road connectivity
- Flight connectivity
- Interesting neighborhoods
- Shopping
- Accommodations (hotels, resorts, etc.)
- LGBTQ+ friendly
- Conventions & conferences

Legend:
- Very important
- Somewhat important
- Neutral
- Not so important
- Not at all important
- N/A

Quality of Life v. Tourism

The "Community Survey" asked respondents **"What do you think would most improve the quality of life in Scottsdale?"** A sampling of responses that directly reference tourism include:

Things really change in our peak season - more traffic, snow birds, overall business. Sometimes it gets hard. But tourism brings so many great events and activities that as residents we get to enjoy year round, it's worth it. More focus on infrastructure to support the high volume is needed.

Tourism is a blessing and a curse. The traffic is worse and it is difficult to find a Tee time! We need tourists however.

A very hard to achieve balance between visitors and people who live in Scottsdale. Scottsdale can't survive without tourism... but its the tourism that makes locals not want to spend time in Scottsdale...

The city should focus on making itself into a 365-day city to (be) less reliant on tourism dollars... Scottsdale should seek to create a more diversified economy that (enhances) the experience for the locals.

3. Case Studies

Clarity of Place chose three venues/points of interest in the city to test the use of the venue by local and non-local visitors during a variety of events.

Events were chosen given their size, their typical audience type, and (with the exception of the Maricopa Home Show) because they receive Tourism Development Commission funding.

WestWorld

Focus: Visitor patterns during major events hosted at the city-owned venue

TPC Scottsdale

Focus: Impact/use of other destination amenities in the city during a major, multi-day event that receives Tourism Development Commission funding

Old Town

Focus: Comparing resident and visitor use of districts within Old Town

WestWorld

WestWorld

Venue Use

WestWorld is a special events facility and equestrian center with 300,000 square feet of climate-controlled space in central Scottsdale along the 101 loop.

Assessed Events

- Barrett-Jackson Scottsdale Auction – Jan 21-29, 2023 | 250,300 attendees*

- Arizona Sun Circuit – Mar 4 – 12, 2023 | 25,300 participants

- Arizona Bike Week – Mar 29 - Apr 2, 2023 | 61,000 participants

- Maricopa County Home Show – Oct 13-15, 2023 | 27,400 attendees

*Event attendance estimates from the City of Scottsdale
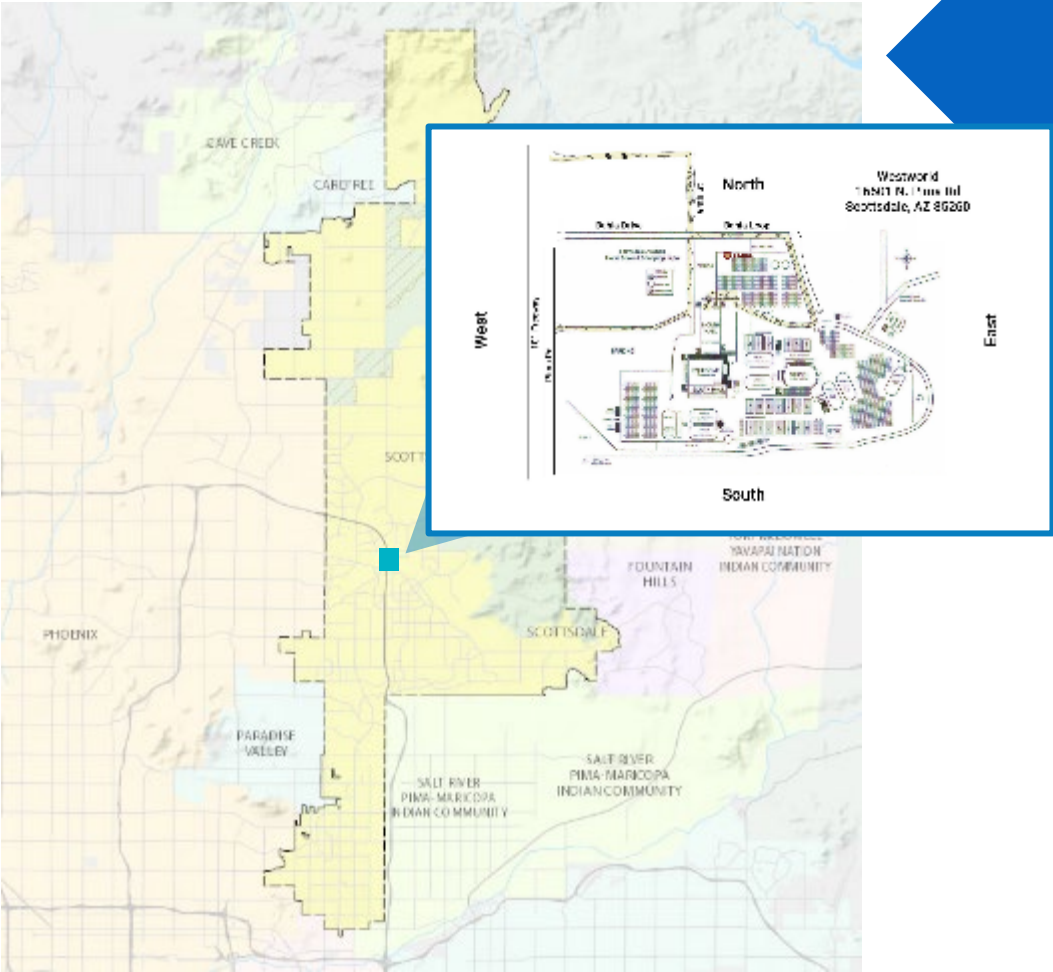
Market Data

Population Growth

The area surrounding WestWorld saw moderate population growth between 2010 and 2023, increasing 14 percent. The surrounding area's growth was lower than the 18.4 percent average growth rate for the same period in Maricopa County.

Traffic Counts

Average daily volume (for the entire calendar year) at intersections surrounding WestWorld range from 14,000 – 15,000
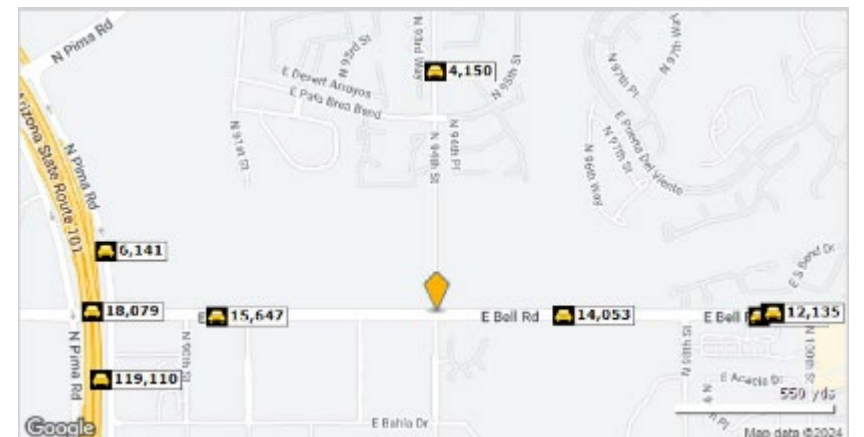
Radius	1 Mile	3 Mile	5 Mile
Population			
2028 Projection	5,909	54,086	128,143
2023 Estimate	5,826	53,330	127,113
2010 Census	5,109	46,787	116,198
Growth 2023 - 2028	1.42%	1.42%	0.81%
Growth 2010 - 2023	14.03%	13.98%	9.39%

Source: CoStar Demographic Report

Traffic Counts
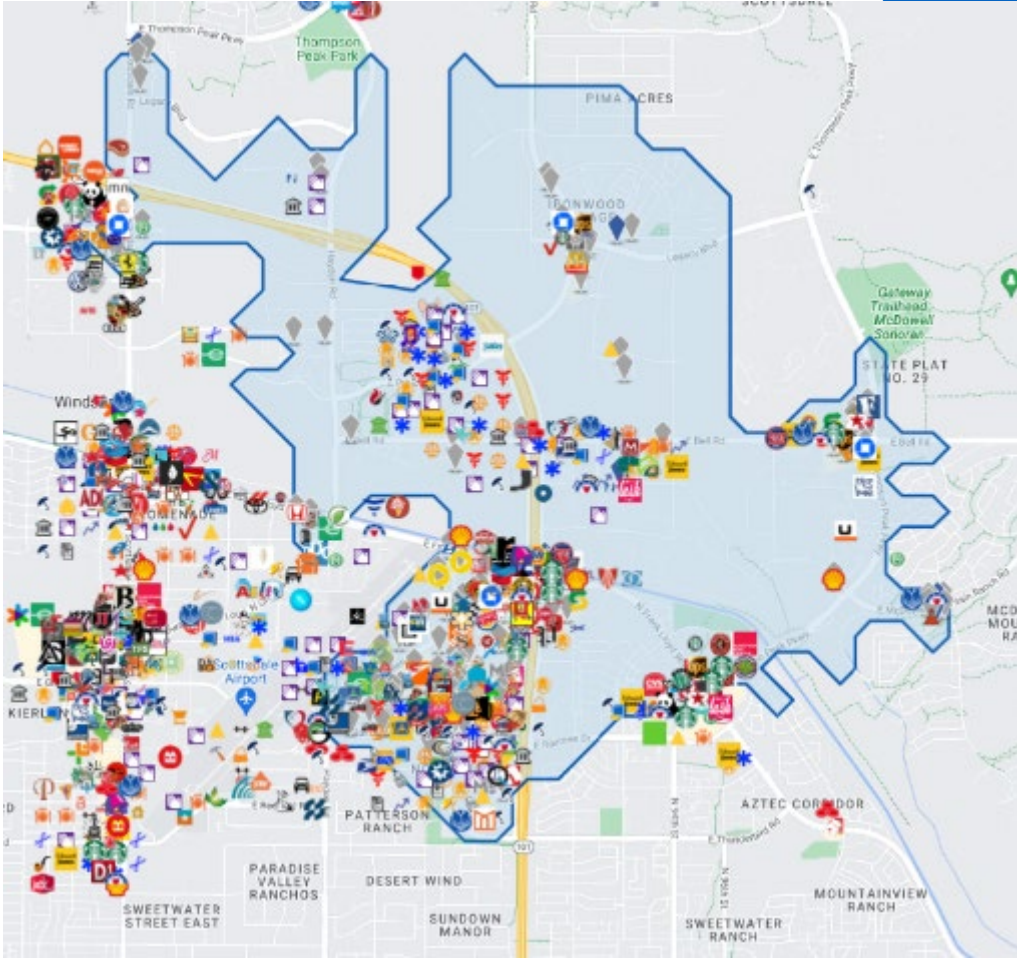
Average Daily Volume

Source: CoStar

Neighboring Amenities

Within a 1-mile radius, of WestWorld, there are roughly 1,030 businesses, Of those businesses, 167 are visitor-facing (i.e., would draw non-residents).

|	
Retail	93
Hospitality & Dining	43
Arts, Entertainment, Recreation	31

Source: CoStar; blue outline = 10-minute drive radius

Visitor Volume

WestWorld hosted an average of nearly 2,000 local visitors daily throughout 2023, with a total of nearly 725,900 local visitors throughout the year.

WestWorld hosted more than 305,000 non-local visitors in 2023, with the majority of those visitors accessing the venue in the January – April timeframe.

For the most of the year, local visitors outnumber non-local visitors to WestWorld.

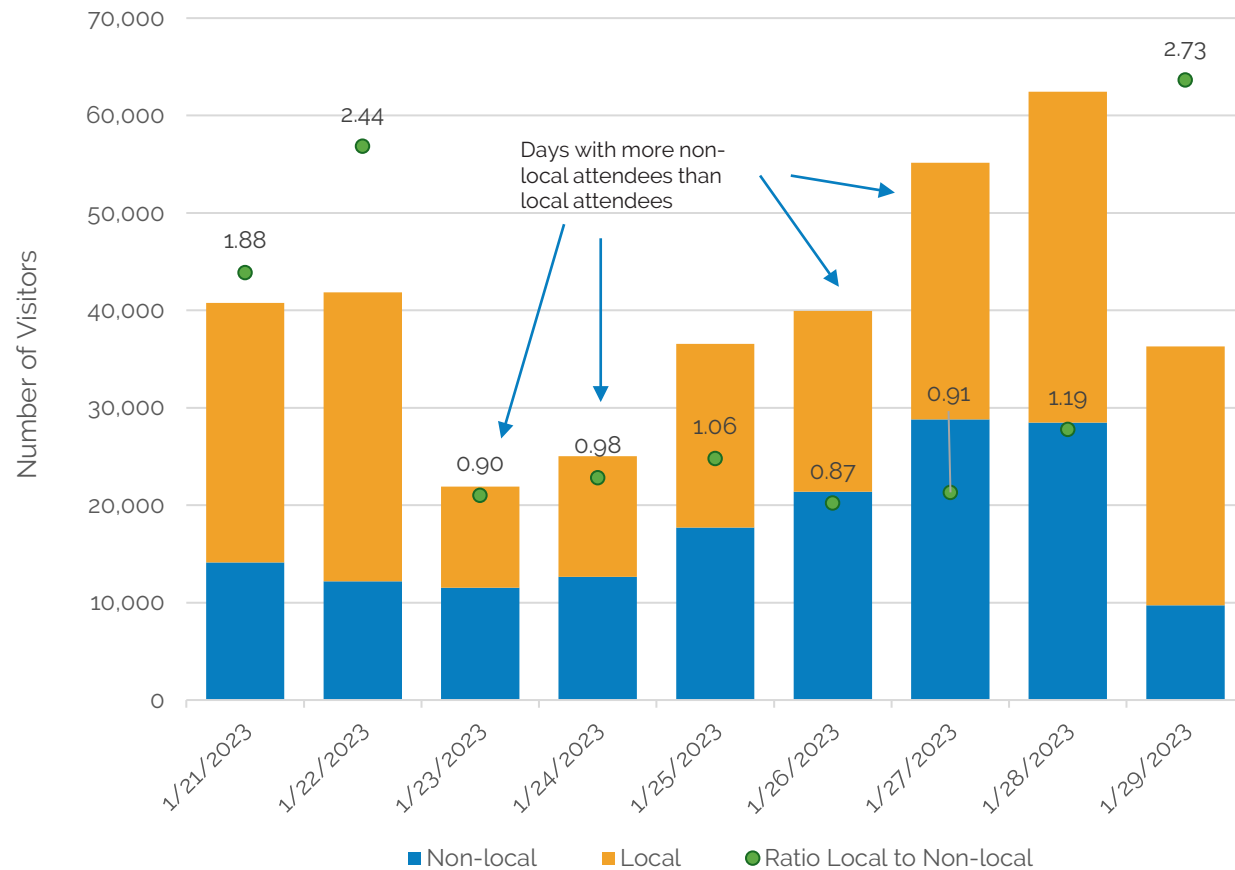Unique Visitors

Ratio of Non-local to Local
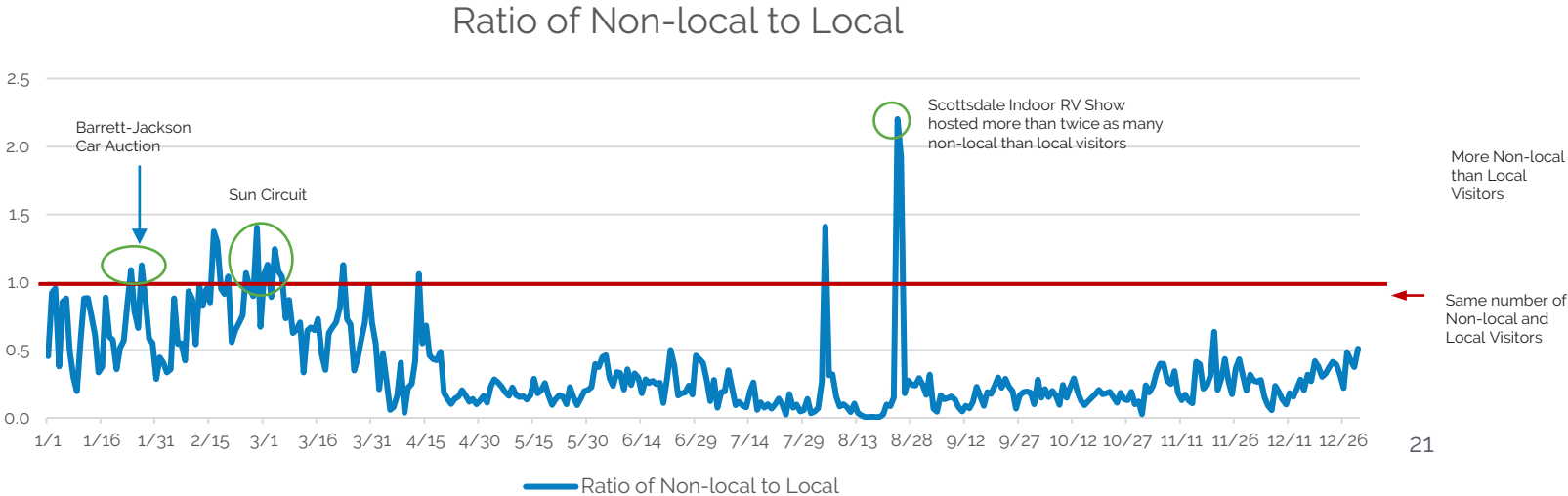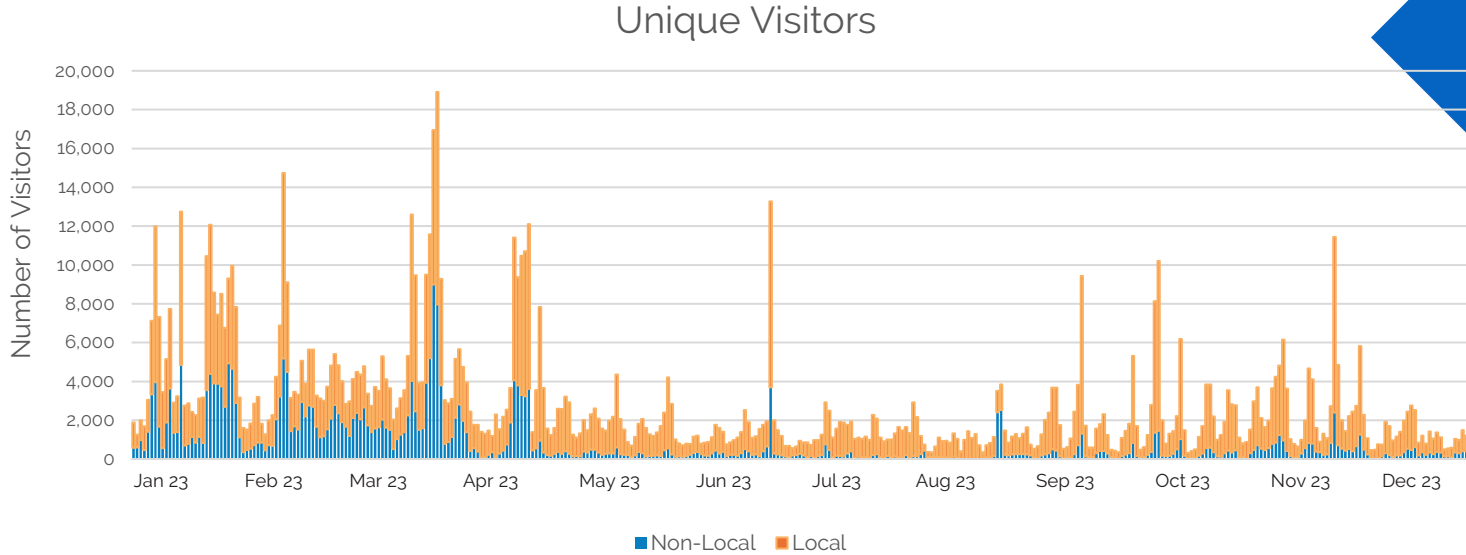
Event Attendance: Barrett-Jackson Auction

The Barrett-Jackson Scottsdale Car Auction is held twice a year, in January and in the Fall. Previous auctions contain a mix of automotive classic and rare cars, celebrity-owned vehicles, and vehicles used in films.

An estimated 250,300 people attended events related to the auction during the opening weekend (e.g., QT Family Day, Lucid Motors and Safe Haven Defense, and the Boy Scouts Pinewood Derby).

Data from Placer.ai indicates that on four days of the nine-day event, non-local visitors outnumbered local visitors slightly.
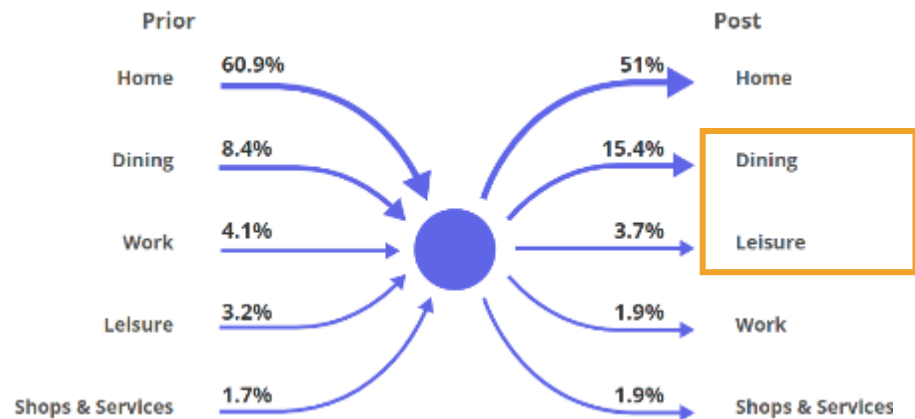
Barrett-Jackson Car Auction

Number of Visitors

Data points (Ratio Local to Non-local):
- 1/21/2023: 1.88
- 1/22/2023: 2.44
- 1/23/2023: 0.90
- 1/24/2023: 0.98
- 1/25/2023: 1.06
- 1/26/2023: 0.87
- 1/27/2023: 0.91
- 1/28/2023: 1.19
- 1/29/2023: 2.73

Days with more non-local attendees than local attendees

Legend: ■ Non-local ■ Local ● Ratio Local to Non-local

Source: Placer.ai, activity for visitors Jan 21-29, 2023.

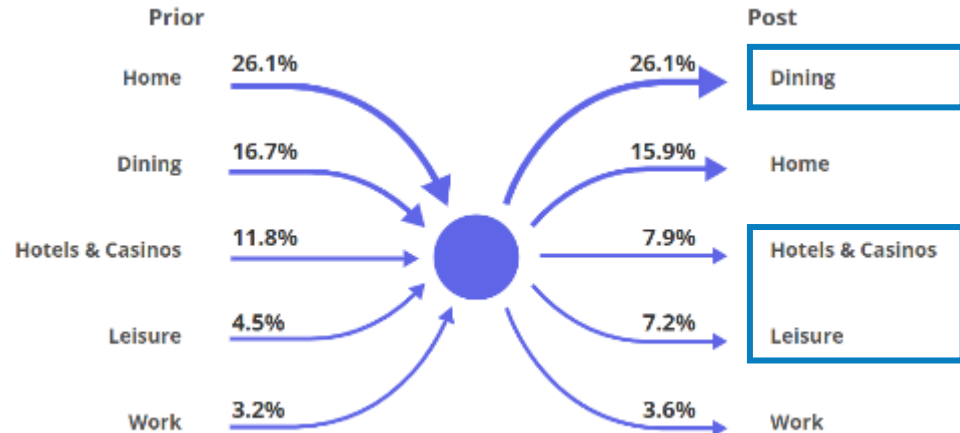22

"Visitor Journey": Barrett Jackson

Visitor travel patterns observed by Placer.ai suggest that non-local visitors to the Barrett-Jackson Car Auction in January 2023 traveled to dining, hotels, and leisure activities after leaving WestWorld more than local visitors. Of the observed non-local visitors to the auction, 41% visited dining establishments and hotels or enjoyed other leisure activities after attending the event. Local visitors appear more likely to return to home or work (52.9%) rather than dine or enjoy other leisure activities (19.1%). Non-local visitors were also observed to attend the auction having visited dining establishments and hotels, or having enjoyed other leisure activities in higher percentages than local attendees.
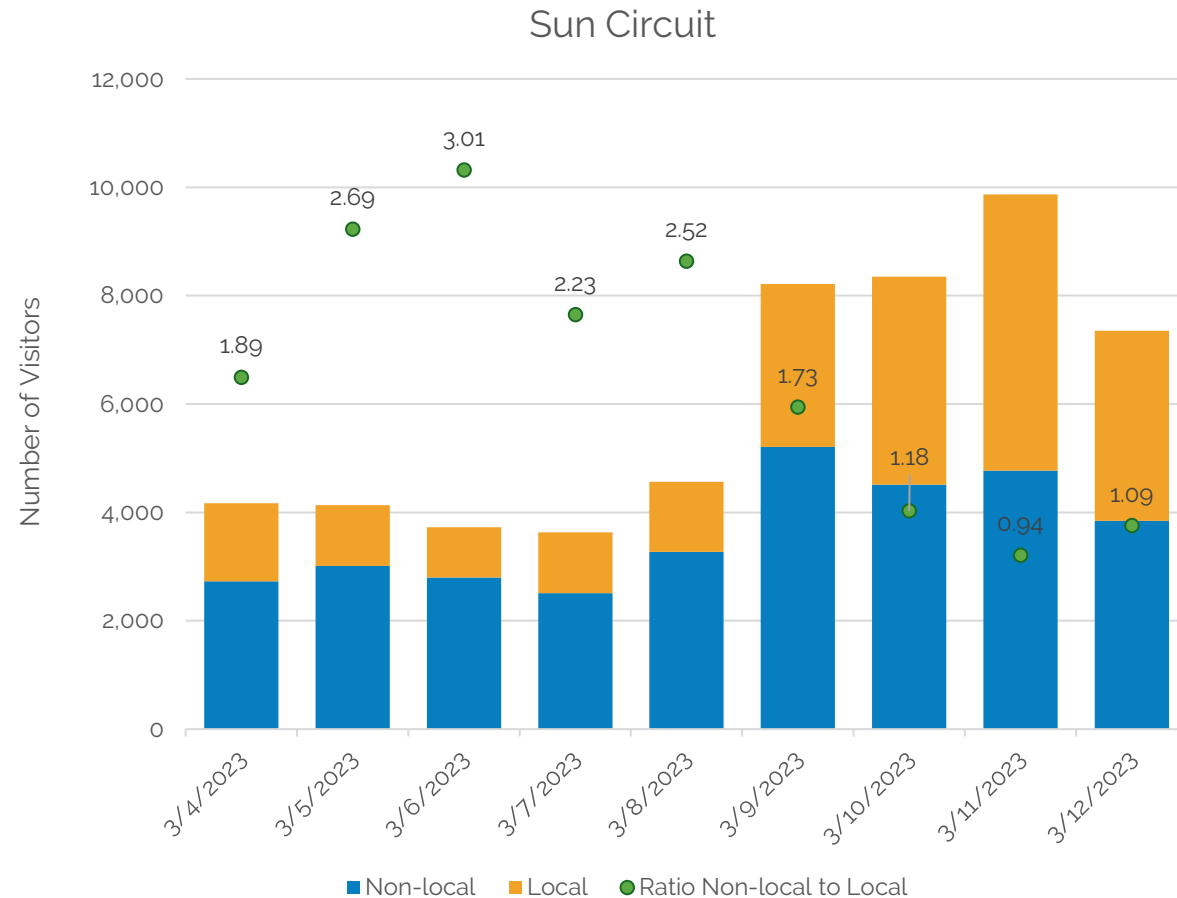
Home address less than 50 miles

Prior			Post
Home	60.9%	51%	Home
Dining	8.4%	15.4%	Dining
Work	4.1%	3.7%	Leisure
Leisure	3.2%	1.9%	Work
Shops & Services	1.7%	1.9%	Shops & Services

Home address more than 50 miles

Prior			Post
Home	26.1%	26.1%	Dining
Dining	16.7%	15.9%	Home
Hotels & Casinos	11.8%	7.9%	Hotels & Casinos
Leisure	4.5%	7.2%	Leisure
Work	3.2%	3.6%	Work

Event Attendance: Sun Circuit

Sun Circuit is the largest American Quarter Horse circuit in the world. 2023 was the event's 50th anniversary.

Data from Placer.ai indicates that with the exception of one day, the event attracted more non-local visitors than local attendees.
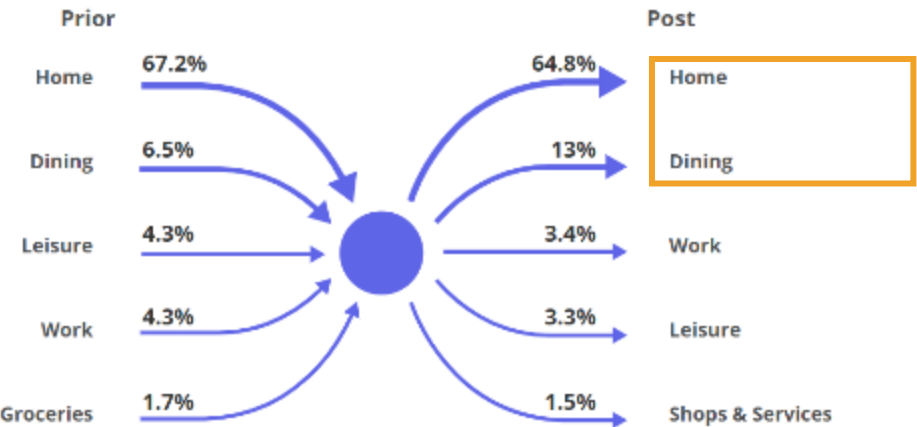

Sun Circuit

Legend: ■ Non-local ■ Local ● Ratio Non-local to Local

Source: Placer.ai, activity for visitors March 4-12, 2023.
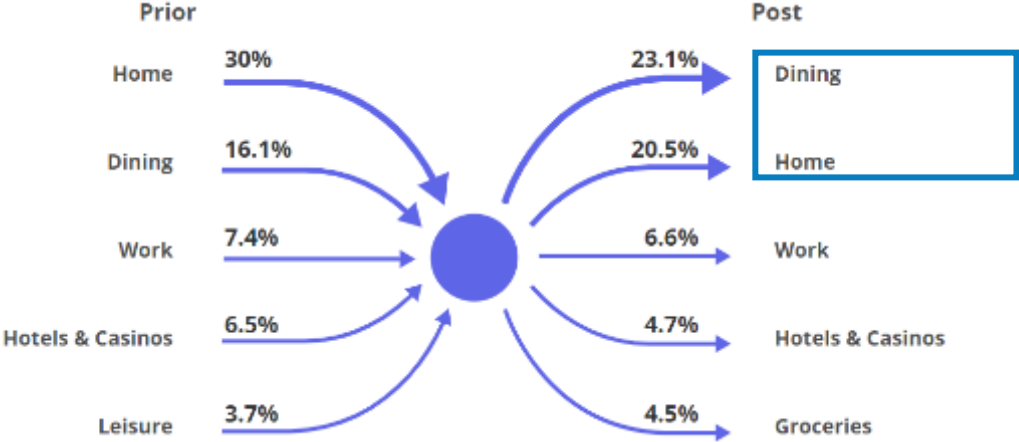
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Visitor Journey: Sun Circuit

Sun Circuit has a higher ratio of non-local visitors. Visitor travel patterns observed by Placer.ai suggest that prior to the event, 26% of non-local participants visited a dining establishment, hotel, or other leisure activity. After the event, 20% returned home after the event, while 23% visited dining establishments.

By comparison, nearly 11% of local participants visited a dining or other leisure activity prior to the event. After the event nearly 65% of local participants returned home, with only 13% visiting dining establishments.

Home address less than 50 miles

Prior		Post
Home	67.2%	64.8% Home
Dining	6.5%	13% Dining
Leisure	4.3%	3.4% Work
Work	4.3%	3.3% Leisure
Groceries	1.7%	1.5% Shops & Services

Home address more than 50 miles

| Prior		Post
Home	30%	23.1% Dining
Dining	16.1%	20.5% Home
Work	7.4%	6.6% Work
Hotels & Casinos	6.5%	4.7% Hotels & Casinos
Leisure	3.7%	4.5% Groceries

Source: Placer.ai, activity for visitors March 4-12, 2023.

Event Attendance: Arizona Bike Week

Arizona Bike Week is a five-day motorcycle and music event with an exhibit hall, as well as live entertainment and bike shows.

Data from Placer.ai indicates that the event has relatively balanced attendance from local and non-local visitors, with Thursday and Friday of the event having a higher ratio of non-local visitors.

Arizona Bike Week

Source: Placer.ai, activity for visitors for March 29 – April 2, 2023.
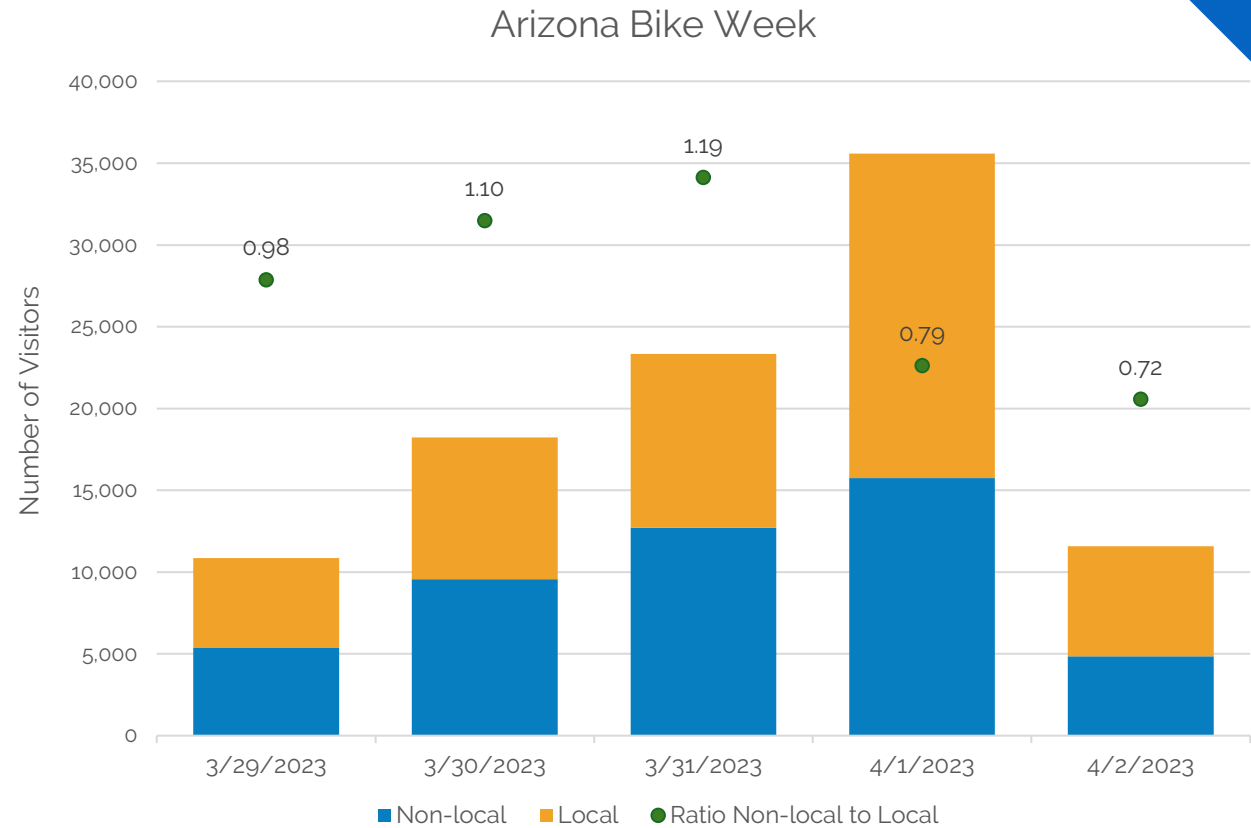
Visitor Journey: Arizona Bike Week

Visitor travel patterns observed by Placer.ai suggest that non-local visitors to Arizona Bike Week traveled to dining, retail and leisure activities before and after participating in the event. Local visitors also traveled to dining, leisure, and retail activities before and after

participating in the event, but in lower percentages than non-local attendees. Nearly half of local participants traveled from their home to the event, and nearly 57% traveled directly home after the event.

Home address less than 50 miles

Home address more than 50 miles
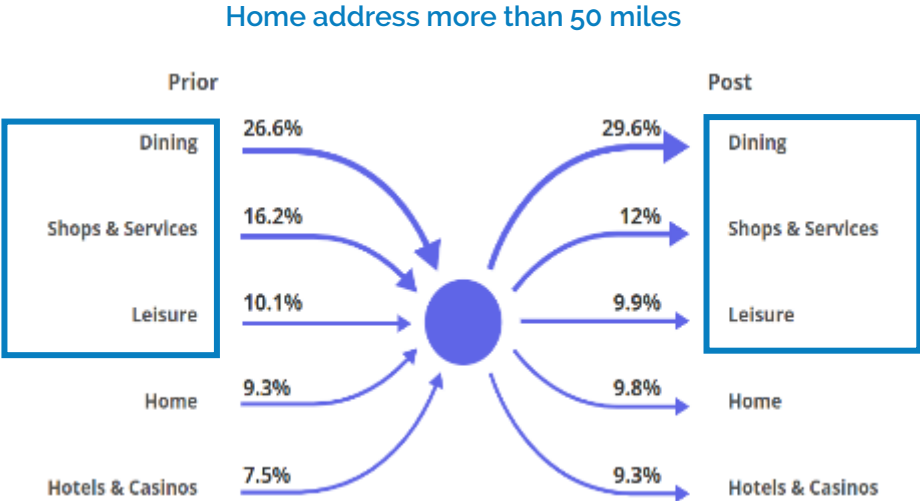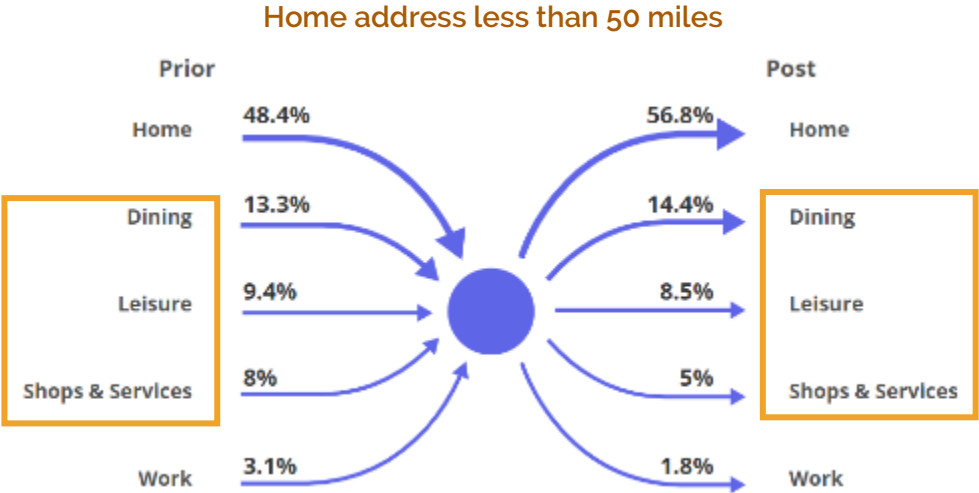
Source: Placer.ai, activity for visitors March 29 – April 2, 2023.

Event Attendance: Maricopa Home Show

The Maricopa Home Show is Arizona's largest home show event, with a more than 30-year history. The fall show is held at WestWorld; the winter/spring show is held at the Arizona State Fairgrounds.

The show does not receive funding from the Tourism Development Commission. It was chosen as a case study to observe differences between events that draw local and non-local visitors and an event that is predominantly for local visitors.

Data from Placer.ai indicates that an average of 85% of attendees are local visitors.
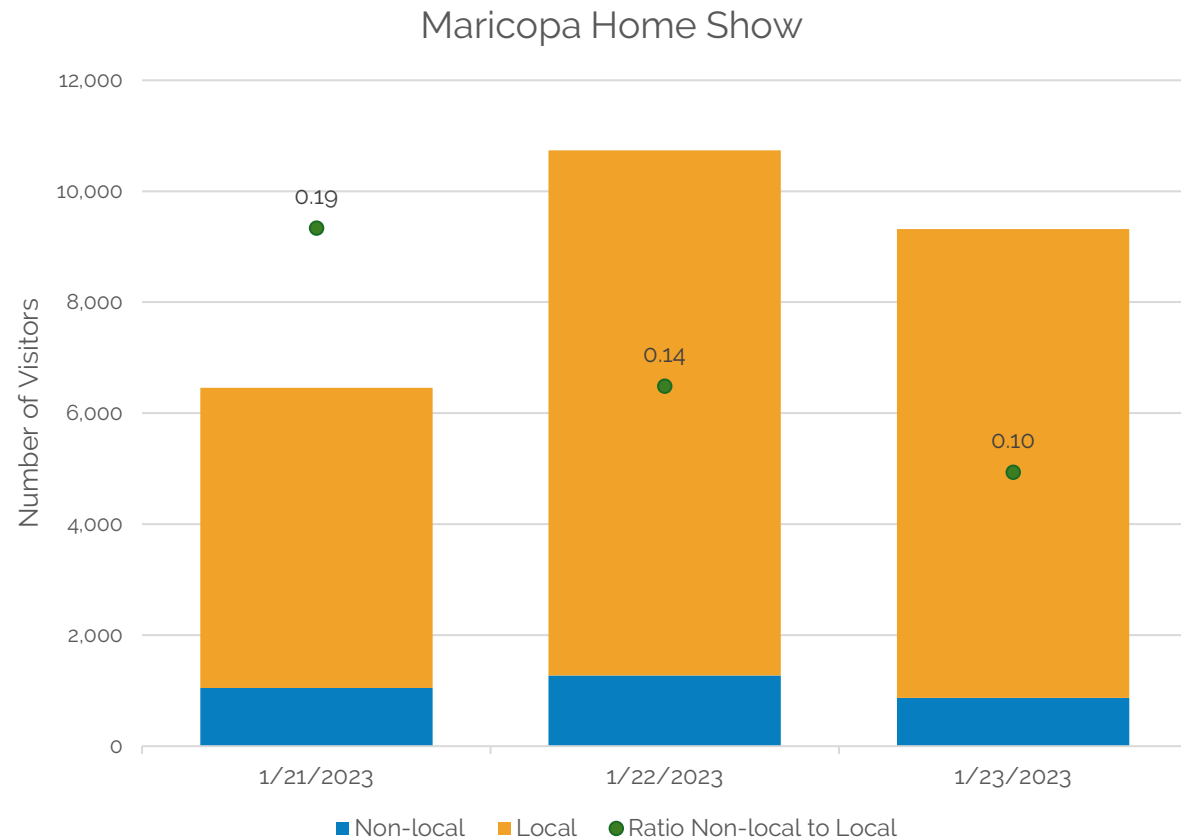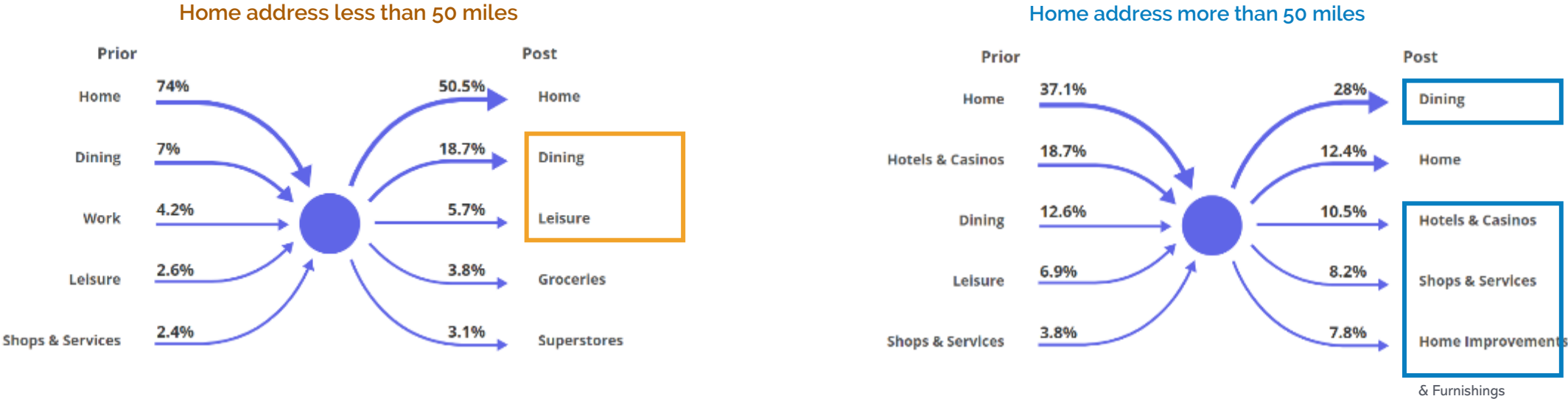
Maricopa Home Show

Source: Placer.ai, activity for visitors Oct 13-15, 2023.

Visitor Journey: Maricopa Home Show

The Maricopa Home Show attracts local attendees. As noted in the data on the previous slide, the ratio of local to non-local guests was roughly .15 to 1,

Visitor travel patterns observed by Placer.ai suggest that non-local attendees travel to dining, hotels, general retail and home furnishing stores after leaving the show. Slightly more than half of local attendees returned home after the show; 24% visited dining establishments or enjoyed other leisure activities after attending the event.

Home address less than 50 miles

Prior		Post
Home	74%	50.5% Home
Dining	7%	18.7% Dining
Work	4.2%	5.7% Leisure
Leisure	2.6%	3.8% Groceries
Shops & Services	2.4%	3.1% Superstores

Home address more than 50 miles

Prior		Post
Home	37.1%	28% Dining
Hotels & Casinos	18.7%	12.4% Home
Dining	12.6%	10.5% Hotels & Casinos
Leisure	6.9%	8.2% Shops & Services
Shops & Services	3.8%	7.8% Home Improvements & Furnishings

TPC

Market Data

Dramatic Population Growth

The area surrounding TPC saw dramatic population growth between 2010 and 2023. There are more residents in the neighborhoods adjacent to the course and within a 3-mile radius.

Venue

Tournament Players Club of Scottsdale. (TPC Scottsdale) was built through the cooperation of the Bureau of Reclamation, the City of Scottsdale, and the Phoenix Thunderbirds. The course is part of the TPC Network's set of 30 courses that have been designed to host or have hosted PGA TOUR-sponsored golf tournaments.

In addition to hosting the WM Phoenix Open, the course is open to pass holders.

Population Growth

Radius	1 Mile	3 Mile	5 Mile
Population			
2028 Projection	3,007	69,699	161,691
2023 Estimate	2,815	67,691	159,259
2010 Census	1,653	55,615	144,780
Growth 2023 - 2028	6.82%	2.97%	1.53%
Growth 2010 - 2023	70.30%	21.71%	10.00%

Source: CoStar Demographic Report

Traffic Counts

Average Daily Volume (for the entire calendar year)
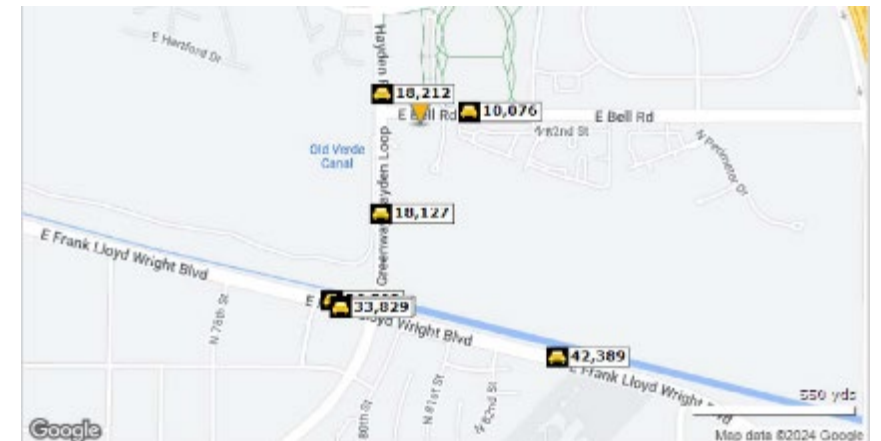
Source: CoStar Traffic vendor (update);

Event Attendance: WM Phoenix Open

The 2023 WM Phoenix Open was held Feb 6-12, 2023. Organizers stopped posting attendance numbers in 2018; however the event reportedly hosts more than 600,000 spectators annually.

The chart to the right depicts the number of visitors observed by Placer.ai. During the days of tournament play – Feb 9-11, there was a relative balance between local visitors and non-local ones. During the other days of the tournament, there were more local attendees than non-local attendees.
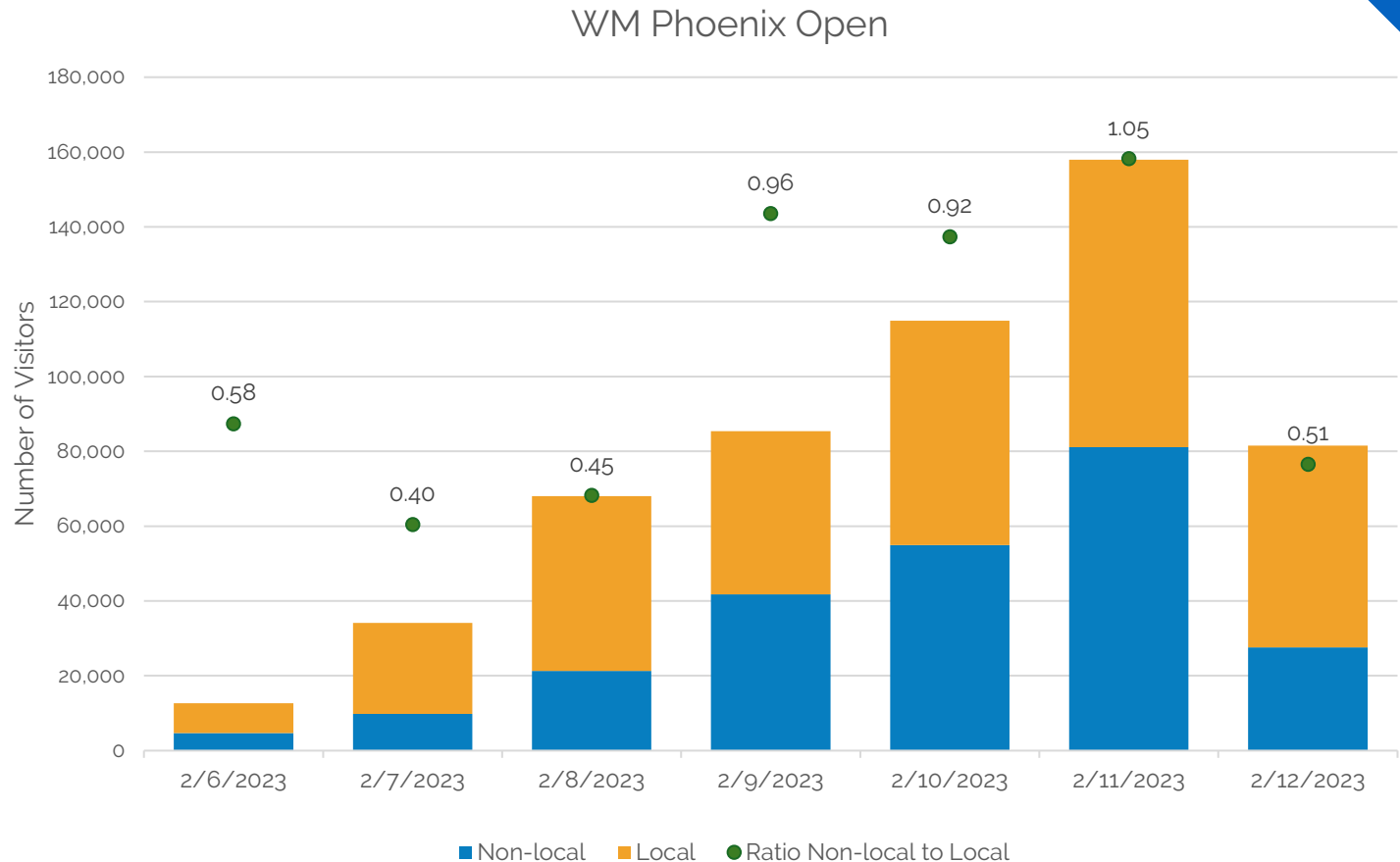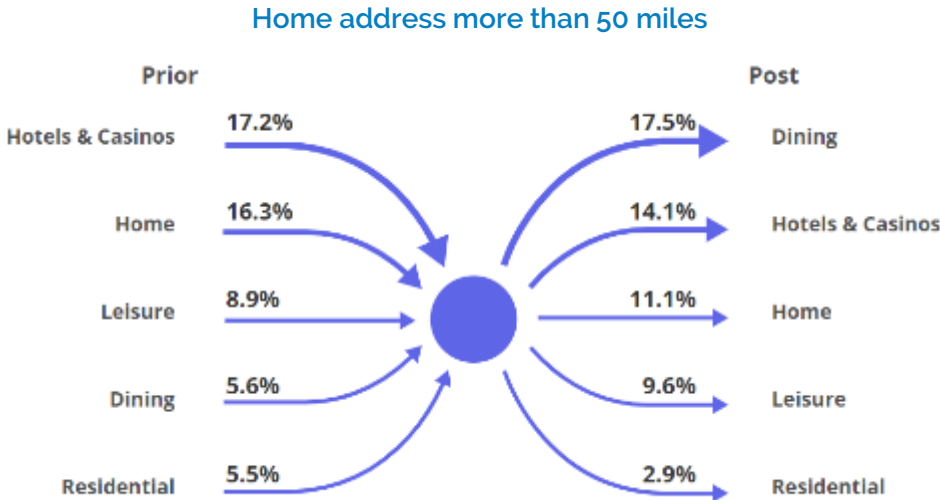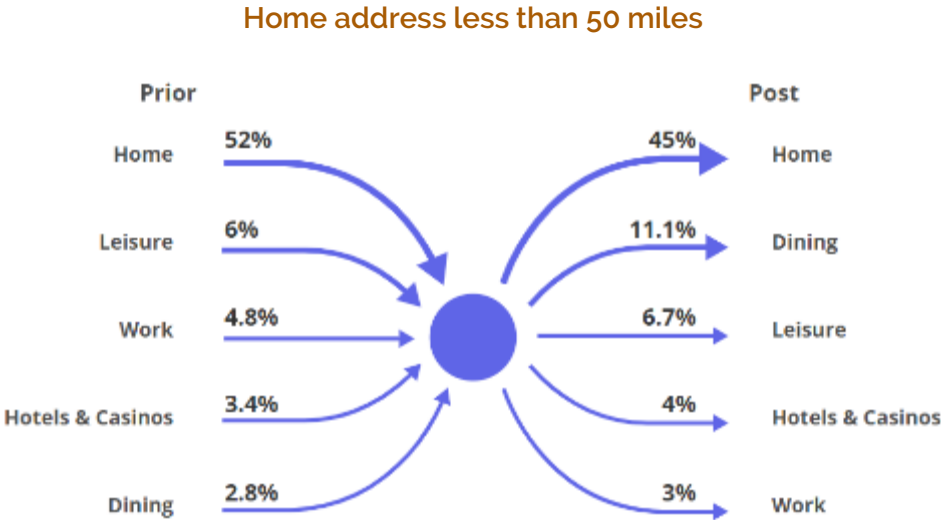

WM Phoenix Open

Source: Placer.ai, activity for visitors Feb 6-12, 2023.

Visitor Journey: WM Phoenix Open

The WM Phoenix Open historically has attracted travelers from beyond the Greater Phoenix area. As noted in the data on the previous slide, the ratio of local to non-local guests was roughly equal during tournament play days, with attendance skewed towards local spectators during the beginning and last days.

Visitor travel patterns observed by Placer.ai suggest that non-local visitors to the Phoenix Open travel to dining, hotels, and leisure activities after leaving TPC more than local visitors. Of the observed non-local visitors to the Open, 41% visited dining establishments, hotels, or enjoyed other leisure activities after attending the event. Local visitors appear more likely to return to home or work (48%) rather than dine or enjoy other leisure activities (14.1%).

Home address less than 50 miles

Prior		Post	
Home	52%	45%	Home
Leisure	6%	11.1%	Dining
Work	4.8%	6.7%	Leisure
Hotels & Casinos	3.4%	4%	Hotels & Casinos
Dining	2.8%	3%	Work

Home address more than 50 miles

Prior		Post	
Hotels & Casinos	17.2%	17.5%	Dining
Home	16.3%	14.1%	Hotels & Casinos
Leisure	8.9%	11.1%	Home
Dining	5.6%	9.6%	Leisure
Residential	5.5%	2.9%	Residential

Source: Placer.ai, activity for visitors Feb 6-12, 2023.
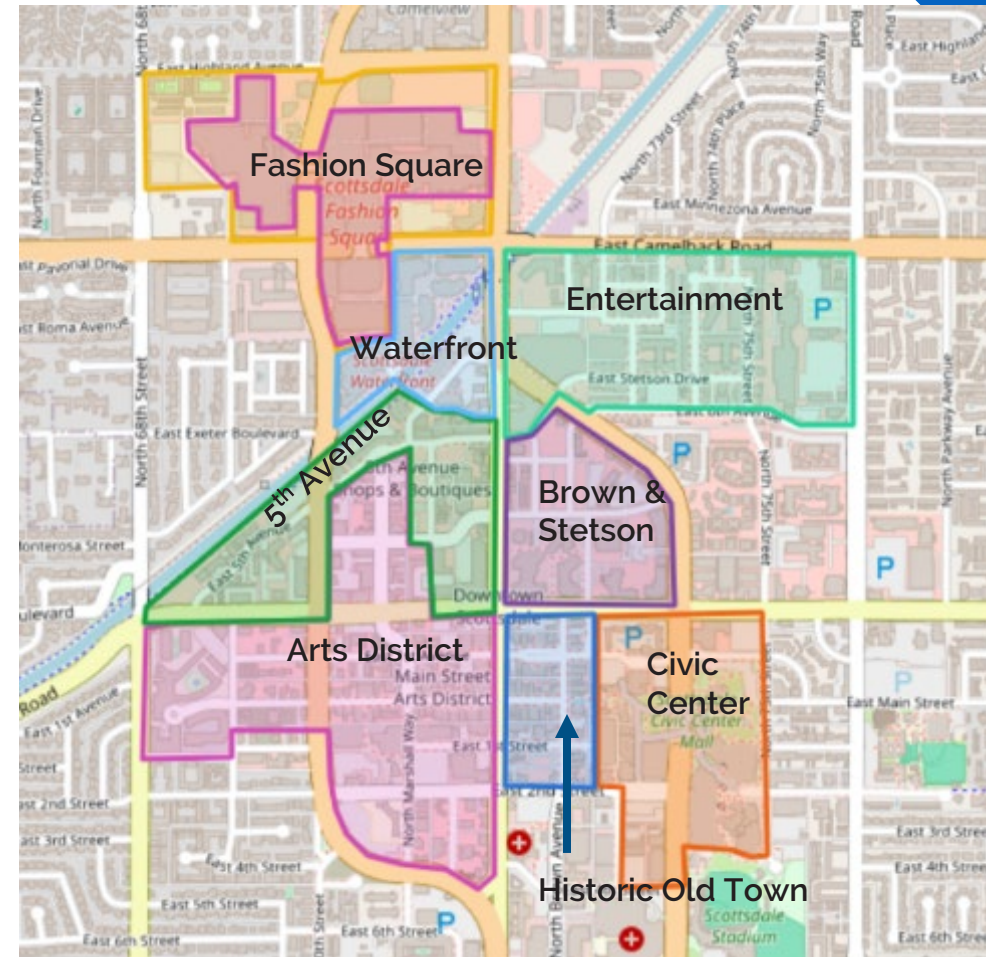
Old Town

Old Town

Venue Use

Old Town serves as Scottsdale's downtown and is the venue for several events and festivals. The Scottsdale Civic Center and Scottsdale Performing Arts Center are located in Old Town.

Districts

The Scottsdale Old Town area is divided into eight specific districts each defined as a Point of Interest in Datafy:

- Arts District
- Brown and Stetson District
- Entertainment District
- Historic Old Town District
- Civic Center District
- Fashion Square District
- Waterfront District
- 5th Avenue Shopping District

Source: Old Town Districts (Clusters) defined in Datdfy.

Market Data

Dramatic Population Growth

The area surrounding Old Town saw substantial population growth between 2010 and 2023. There are more residents in the neighborhoods adjacent to the Old Town Districts.

Traffic Counts

Average daily traffic counts around the Points of Interest are relatively equal (for the entire calendar year).

Population Growth

Radius	1 Mile	3 Mile	5 Mile
Population			
2028 Projection	24,843	102,217	212,515
2023 Estimate	23,820	100,991	209,397
2010 Census	16,747	89,841	182,617
Growth 2023 - 2028	4.29%	1.21%	1.49%
Growth 2010 - 2023	42.23%	12.41%	14.66%

Source: CoStar Demographic Report

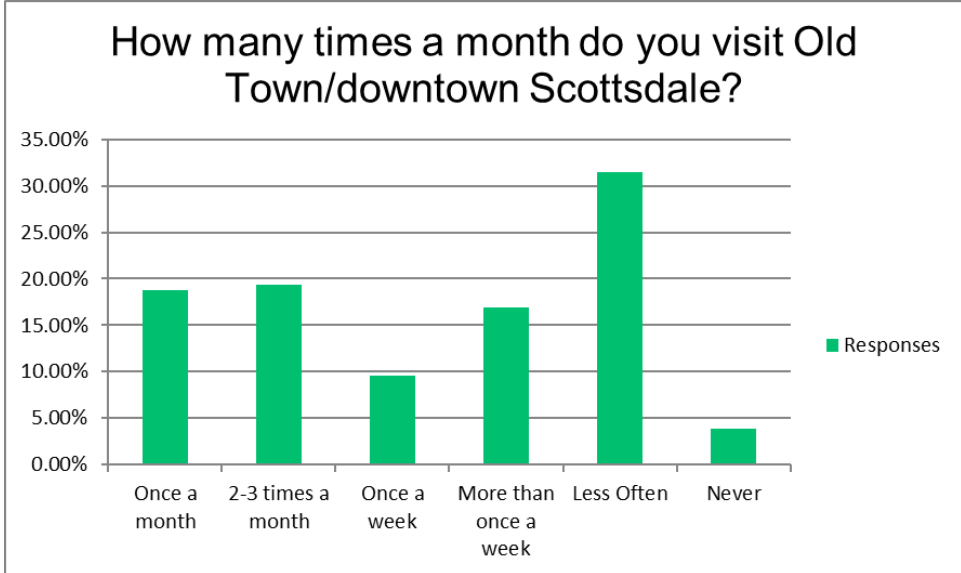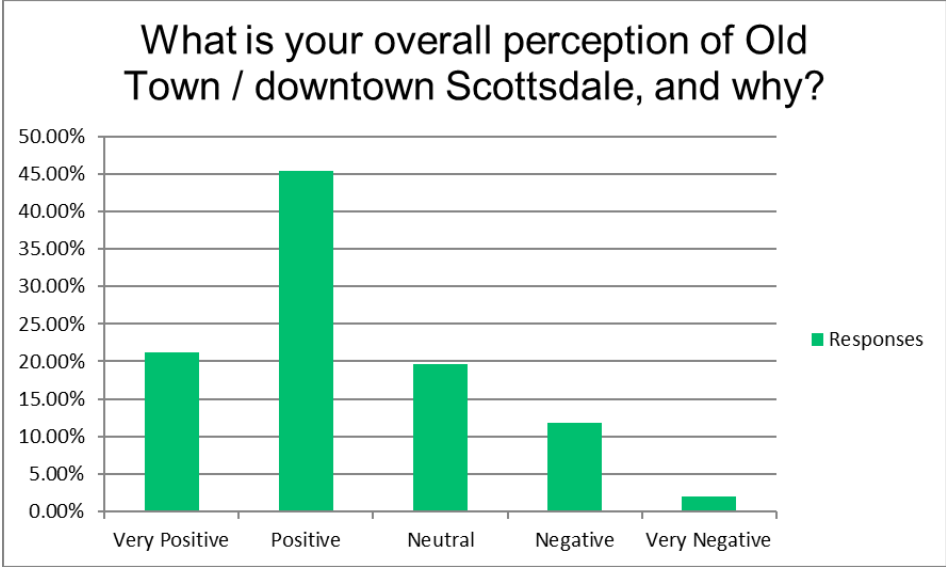## Traffic Counts

Average Daily Volume

Source: CoStar

Resident Views on Old Town

The "Community Survey" asked respondents about their perception of Old Town and the frequency with which they visit.

Two-thirds of respondents (66.6%) have a "positive" or "very positive" perception of Old Town. Slightly less than two-thirds of respondents

(64.7%) report that they visit Old Town at least once a month. More than one-quarter of respondents (26.5%) visit Old Town at least once a week.

What is your overall perception of Old Town / downtown Scottsdale, and why?

How many times a month do you visit Old Town/downtown Scottsdale?

Visitors to Old Town

Old Town hosted an average of 30,500 local visitors daily throughout 2023. Old Town hosted nearly 3.4 million non-local visitors in 2023. March was the busiest month for non-local visitors to Old Town.
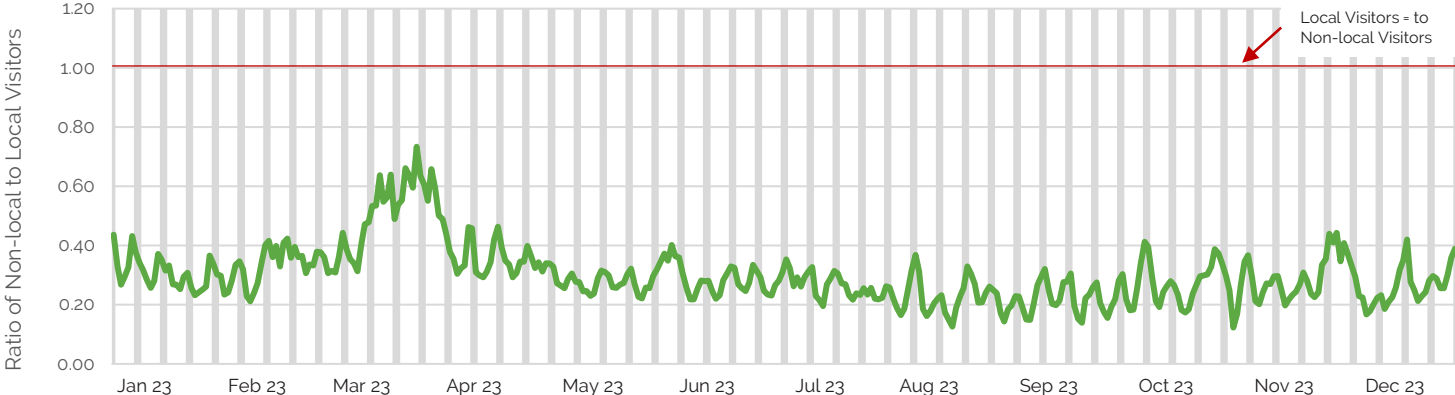
On a daily basis, local visitors were observed to outnumber non-local visitors.

Higher volumes of visitors (both local and non-local) occurred mostly on weekends (Friday – Sunday)

Unique Visitors

Legend: ■ Non-Local ■ Local
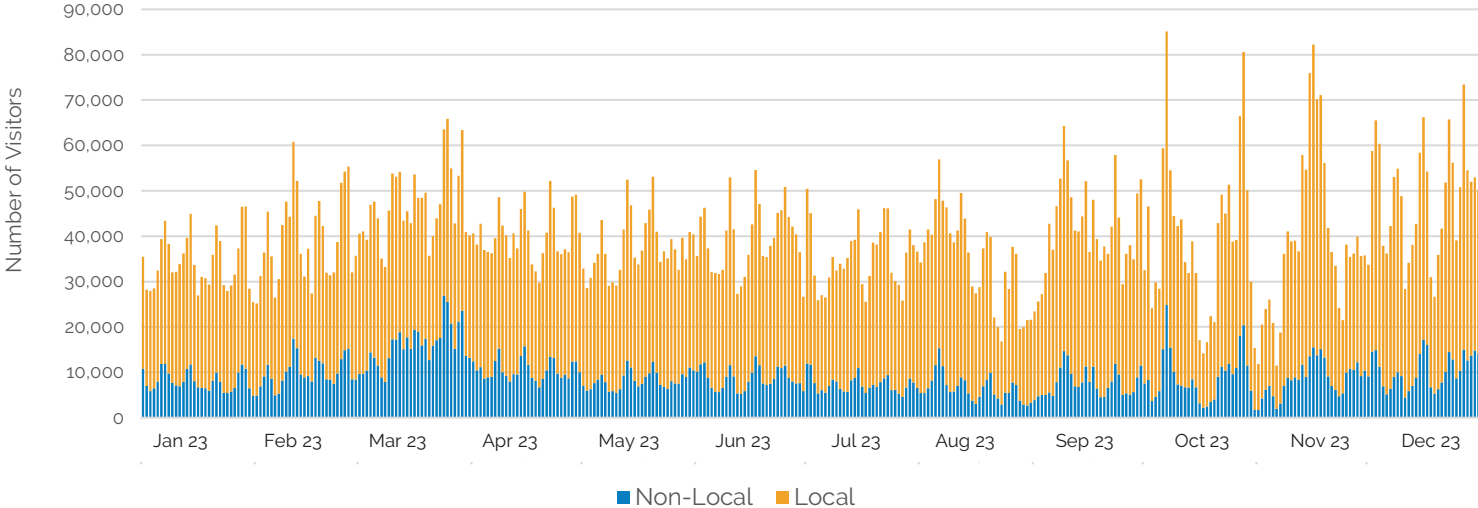
Ratio of Non-local to Local Visitors

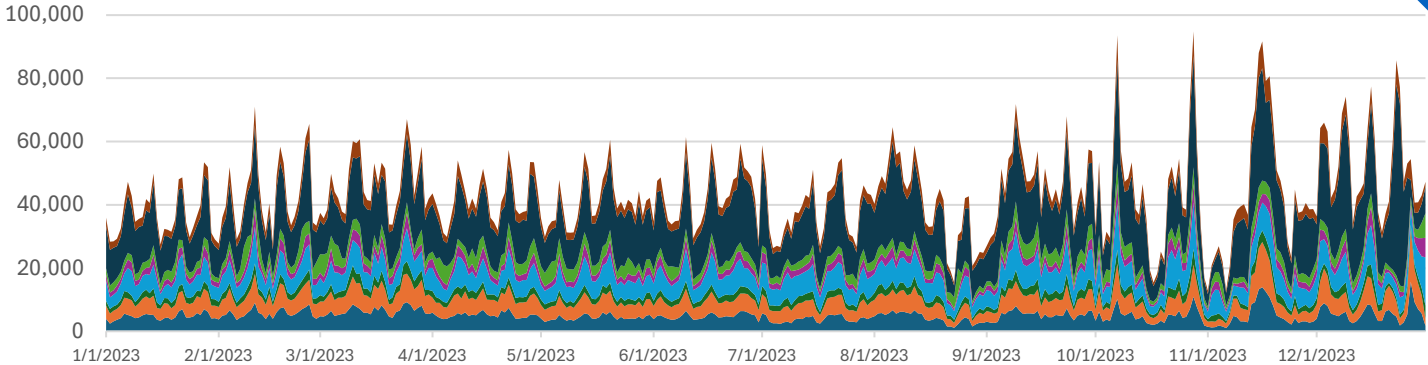Local Visitors = to Non-local Visitors
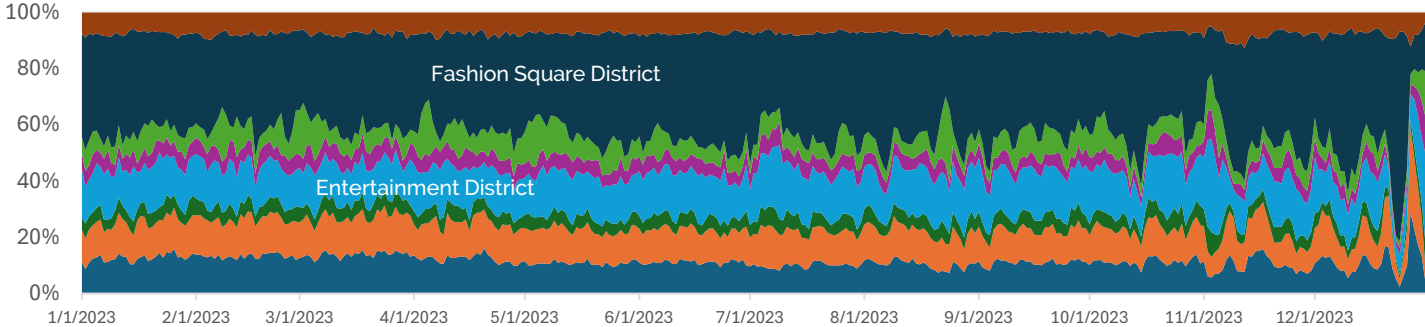
Local Visitors by District

The Fashion Square District had the most local visitors in Old Town in 2023, averaging nearly 16,000 visitors daily. The Entertainment district saw the second largest local visitation, averaging more than 5.200 visitors daily.

Visits to the Civic Center District had the most fluctuations of the districts. The Brown & Stetson District had the fewest numbers of local visitors.

Local Visitors

Percent breakdown of Local Visitors

Fashion Square District

Entertainment District

■ 5th Avenue ■ Arts District ■ Brown & Stetson ■ Entertainment District ■ Historic Old Town ■ Civic Center ■ Fashion Square ■ Waterfront
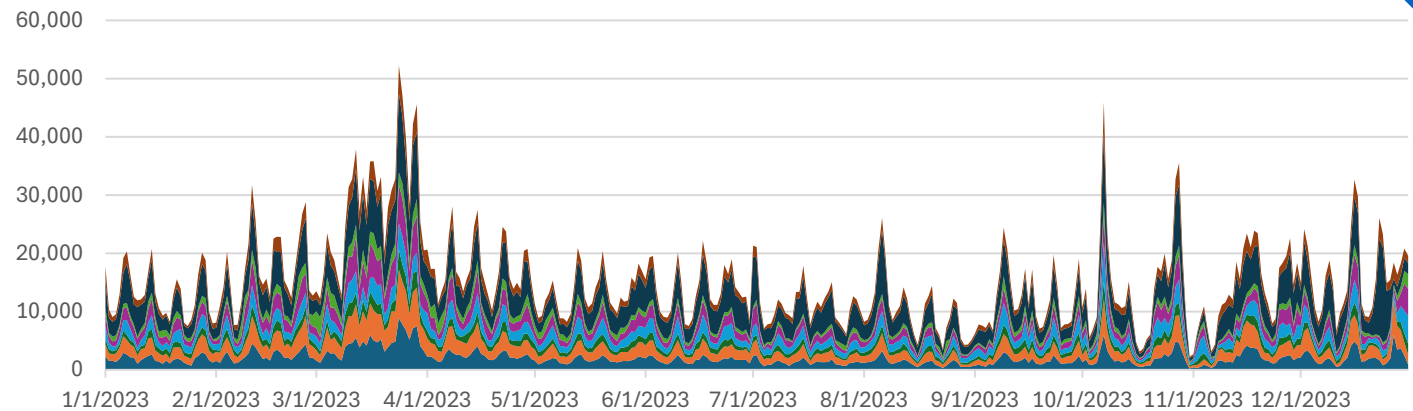
Non-Local Visitors by District

The Fashion Square District had the most non-local visitors in Old Town in 2023, averaging more than 4,250 non-local visitors daily. The Arts District saw the second largest non-local visitation, averaging 2,100 non-local visitors daily, followed closely by the 5th Avenue District with slightly over 2,000 non-local visitors on average a day.
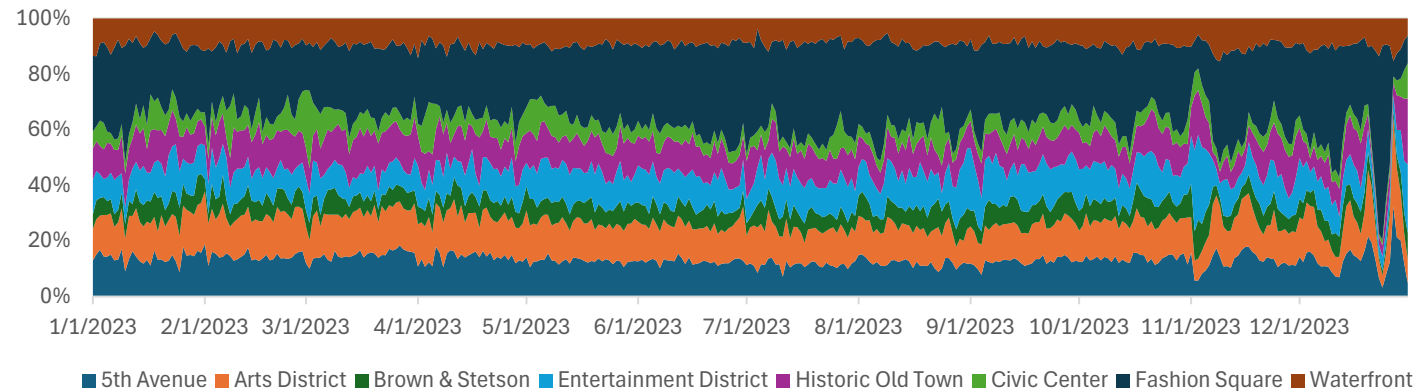
The Civic Center and Brown & Stetson Districts had the fewest numbers of non-local visitors.

Non-local visitor volume to Old Town was highest in late March through early April.


Non-local Visitors

Percent Breakdown of Non-local Visitors

5th Avenue ■ Arts District ■ Brown & Stetson ■ Entertainment District ■ Historic Old Town ■ Civic Center ■ Fashion Square ■ Waterfront

Arts & Culture Points of Interest

Among Old Town's Arts & Culture museums (assets), the Old Adobe Mission and Museum of the West had the most visitation by non-locals when compared to visitation by locals.

The high ratio of local to non-local visitors by the Scottsdale Center for the Performing Arts, the Scottsdale Historical Society, and the Scottsdale Museum of Contemporary Art indicates that these POIs attract mostly local guests.

Visitor Trips in 2023

Number of Trips (in Thousands)

4.66 — 4.66

3.62 — More Local Visitors than Non-local Visitors

More "balanced visitation by Local Visitors and Non-local Visitors

1.40   1.50

Scottsdale Center for the Performing Arts | Scottsdale Historical Society | SMOCA | Old Adobe Mission | Museum of the West

■ Non local   ■ Local   ● Ratio Local to Non-local
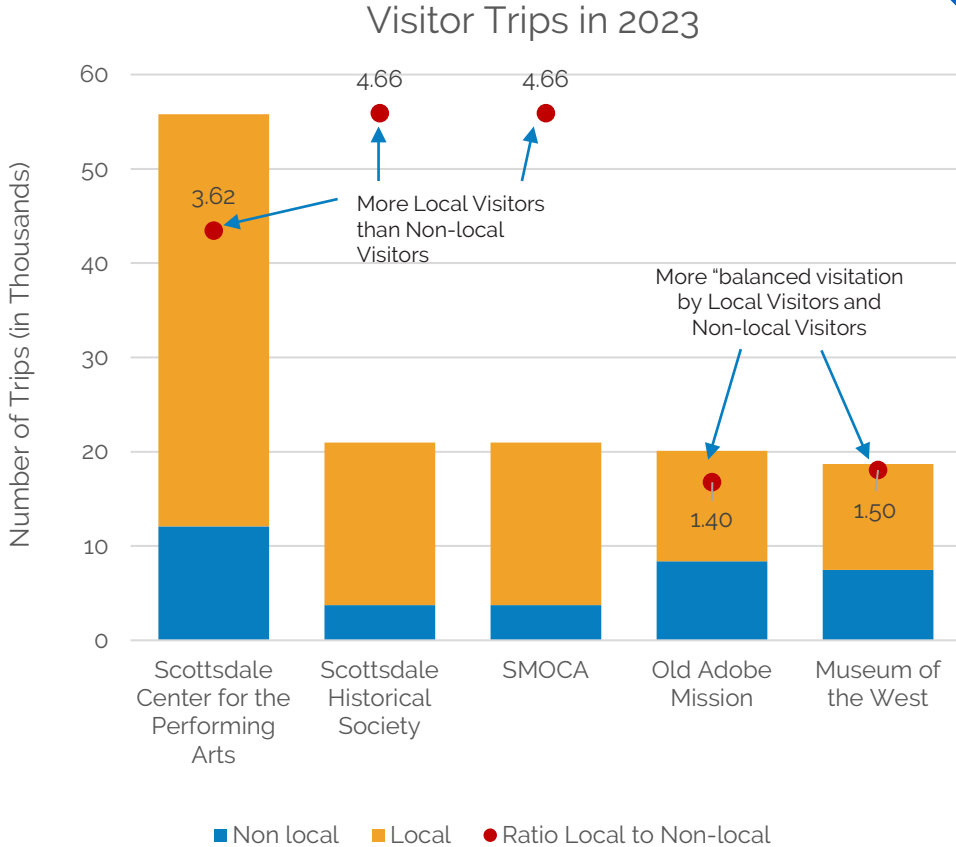
Visitor Journey: Feb & Mar

To begin to understand the impact of events in Old Town, visitor patterns through Placer.ai's "Visitor Journey" filter were compared in February and March of 2023 (since these two months were the busiest in terms of visitor trips in Old Town). The Visitor Journey was filtered by "category" instead of "category group" to allow for more insights into the type of property visited.

Observed travel patterns suggest that non-local visitors to Old Town more frequently visit hotels, restaurants, and attractions before and after visiting Old Town. A number of non-local visitors appear to visit Old Town after leaving sports facilities. Local visitors appear more likely to return to home after visiting Old Town and visit a range of dining options.

Home address less than 50 miles
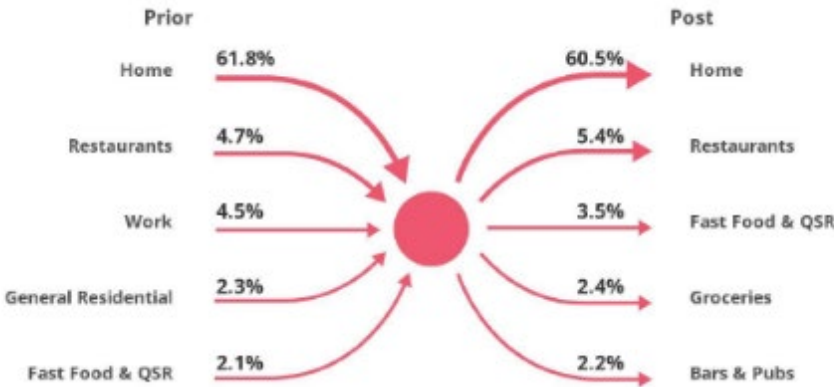
Home address more than 50 miles
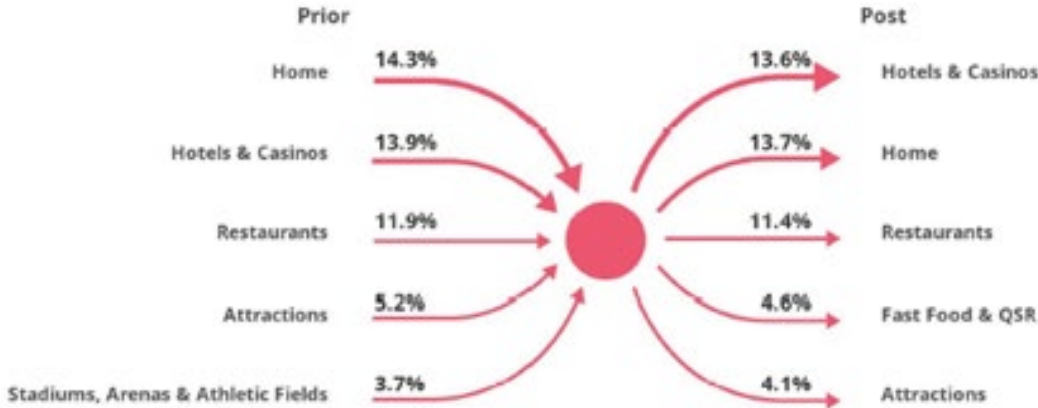
Source: Placer.ai, activity for visitors February 1-March 31, 2023.

4. Key Findings

Insights

- If measured by Visitor Trips, local visitors appear to outnumber non-local visitors throughout the year. However, if measured by Unique Visitors, non-local visitors outnumber local visitors each month of the year, with the exception of November and December. This suggests that local visitors access the city's Points of Interest (POIs), multiple times during a given month.

- At WestWorld, the number of local visitors was mostly higher than non-local visitors in 2023. There were several days in late January through March, and then again in July and August when non-local visitors outnumbered local visitors. These were tied to events at the venue.

- Placer.ai's "Visitor Journey" data suggests that non-local visitors (i.e., visitors whose home address is more than 51 miles from the POI) tend to travel to dining, retail, and other leisure activities after leaving an event more than local visitors (i.e., visitors whose home address is less than 50 miles from the POI). Local visitors also travel to dining, retail, and other leisure activities after leaving an event, but in lower percentages.

- The areas surrounding WestWorld and TPC appear to be increasingly "busy" thanks to population growth in the surrounding area and the concentration of visitor-facing (non-daily need) businesses. The area surrounding Old Town has experienced tremendous population growth.

- Old Town is a well-used POI by residents. Slightly less than two-thirds of respondents to the community survey report that they visit Old Town at least once a month; 26.5% of respondents visit Old Town at least once a week.

- The Scottsdale Fashion Square and Entertainment Districts are the most visited of the POIs in Old Town. The Civic Center, Arts, and Entertainment Districts appear to have spikes in visitation throughout the year (presumably due to events).

- Population growth in the county and city (and concurrent increases in population density) has added to the increased activity at the venues during the events and throughout the year; some community survey respondents recognize that; others do not.

- The aspects of Scottsdale that community members feel are very important or somewhat important to drawing them/keeping them in the city are shared by the visitor economy. This may impact perceptions of "over-crowding" or a lack of balance between resident and visitor use of facilities.

Potential Actions to Demonstrate Current "Balance"

- Using the data available from Datafy and Placer.ai, share the breakdown of local and non-local visitors for events that draw comments of over-crowding or negative impact.

- Add a narrative of the city and county's tremendous population growth to descriptions of the positive impact of the visitor economy.

- Replicate the methodology used in the case studies and observations of need periods (especially in Old Town) to provide a rationale for city support of certain events to non-local visitors.
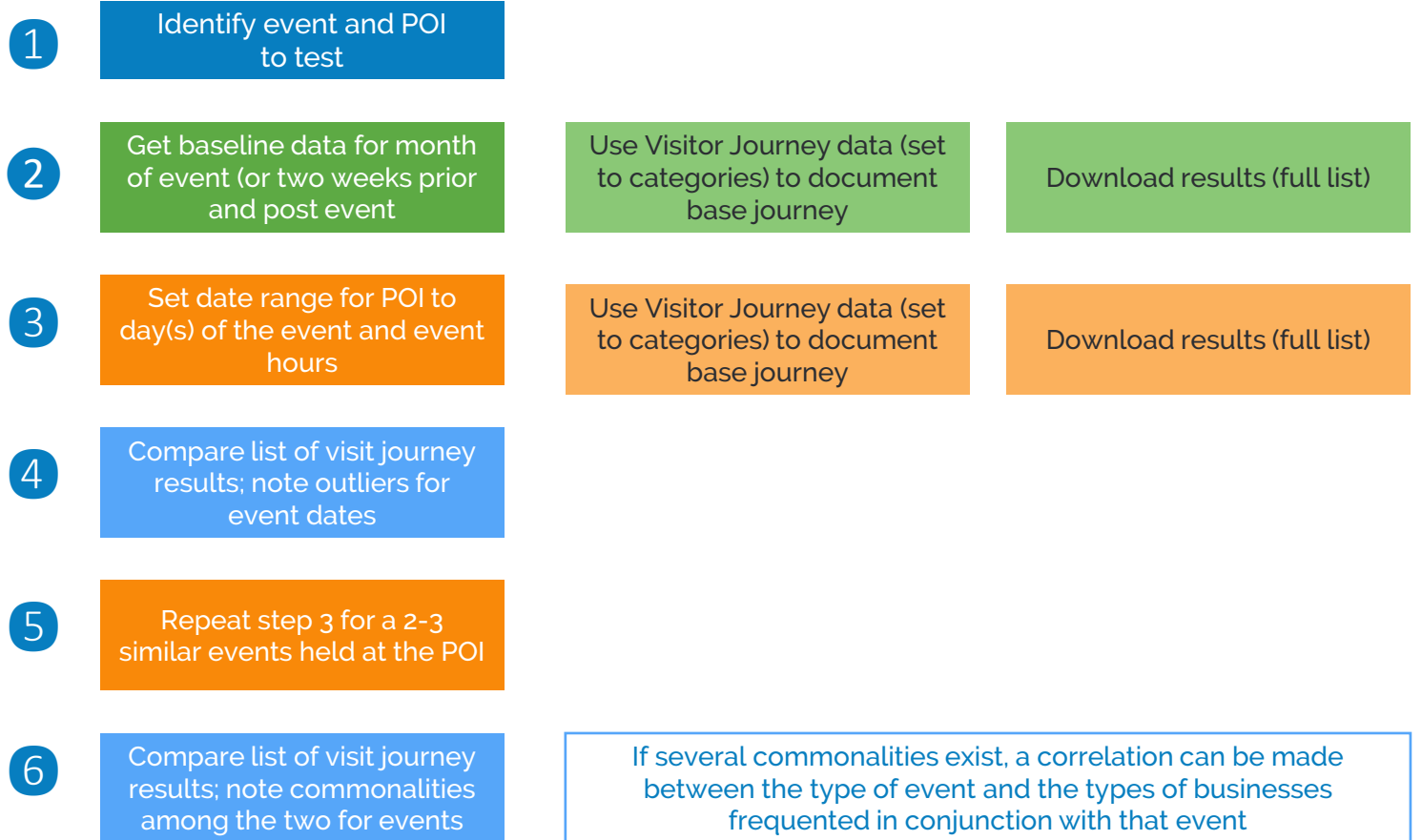
Appendix

Impact of Events on businesses

Impact of Events on Businesses

As part of the assignment to assess the city venues and facilities, Clarity of Place attempted to use data available to Scottsdale and Experience Scottsdale to understand the impact of various events on businesses in Old Town.

Clarity assumes that different types of events draw different audiences and hoped to use geolocation data to observe the extent to which guests (either local or non-local) to specific events in Old Town remain in the area and spend at certain business types.

The process to the right could be used to query the City of Scottsdale's Placer.ai data to test the above assumption.

1 Identify event and POI to test

2 Get baseline data for month of event (or two weeks prior and post event | Use Visitor Journey data (set to categories) to document base journey | Download results (full list)

3 Set date range for POI to day(s) of the event and event hours | Use Visitor Journey data (set to categories) to document base journey | Download results (full list)

4 Compare list of visit journey results; note outliers for event dates

5 Repeat step 3 for a 2-3 similar events held at the POI

6 Compare list of visit journey results; note commonalities among the two for events | If several commonalities exist, a correlation can be made between the type of event and the types of businesses frequented in conjunction with that event

Event Attendee Behavior Example

To drill down slightly further in understanding event participant behavior and to provide an example of the application of the process to understand the impact of various events on businesses in Old Town., visitor patterns for attendees (local and non-local) of the Parada del Sol Parade on February 3, 2024, were observed.

These patterns were compared to the patterns of visitors to Scottsdale for the two weeks prior to the parade and two weeks after. The comparison suggests that parade attendees were more likely to visit restaurants before or after the parade than visitors to Old Town during non-parade days. Parade attendees were also more likely to visit galleries in Old Town before or after the parade than visitors to Old Town during non-parade days.

Parade Day

- Specialty Retail 8%
- Apparel & Jewelry 1%
- Shopping Centers 25%
- Dining 49%
- Leisure/Entertainment 1%
- Gallery 16%

Non-Parade Weeks

- Specialty Retail 13%
- Apparel & Jewelry 13%
- Shopping Centers 20%
- Dining 43%
- Leisure/Entertainment 4%
- Gallery 7%

Source: Placer.ai, activity for visitors February 3, 2024, and January 22-February 2 and February 5-7, 2024.

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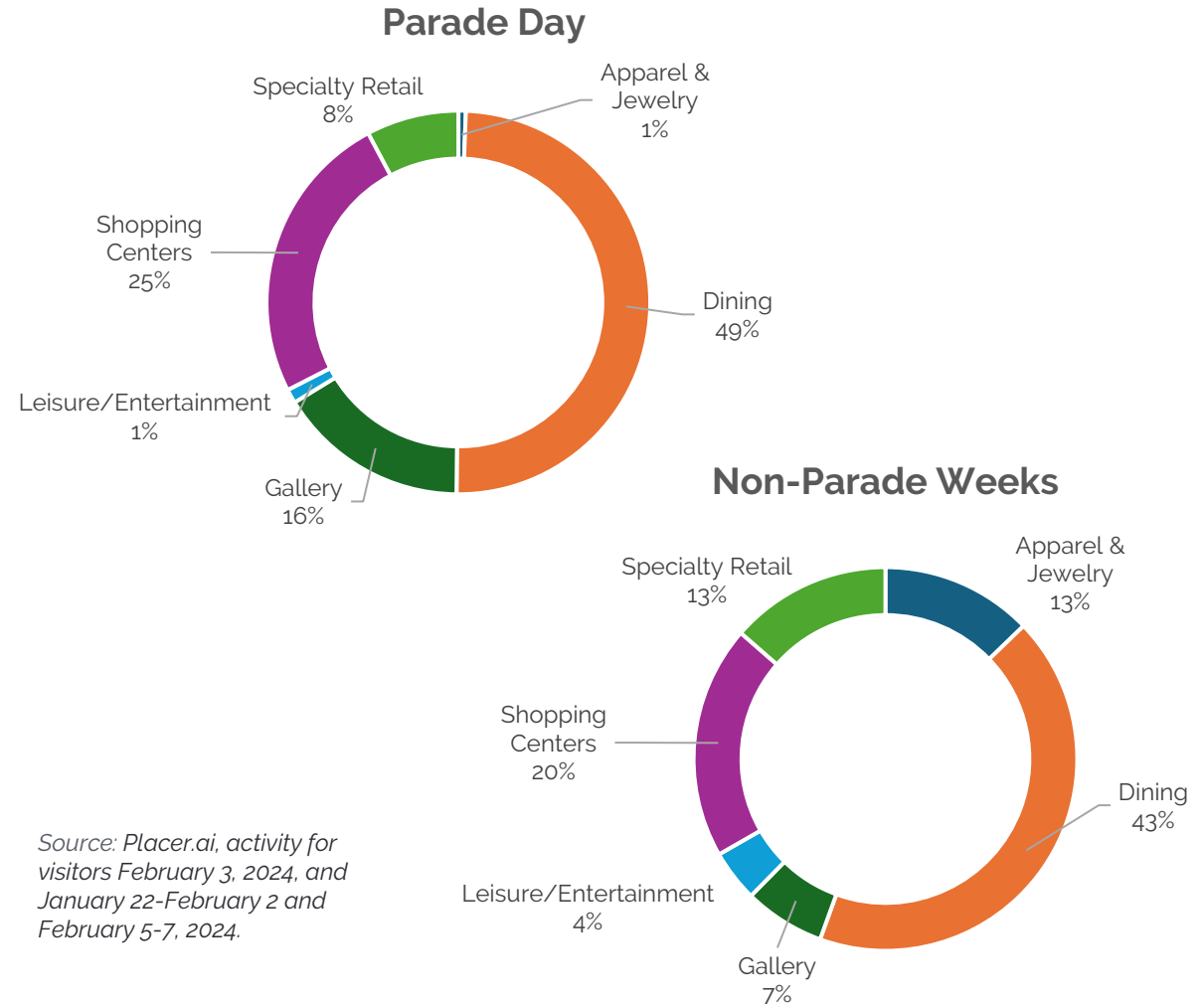
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Assessments conducted by

n

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