



2024 SCOTTSDALE FACILITY USAGE STUDY EXECUTIVE SUMMARY

Conducted by Clarity of Place, April 2024

In partnership with the City of Scottsdale and Experience Scottsdale

Background & Methodology

To further the five-year Scottsdale Tourism & Events Strategic Plan, the City of Scottsdale and Experience Scottsdale worked with Clarity of Place to assess visitor flows at city-owned venues and in Old Town Scottsdale. One of the goals of the plan is 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.”

For the study, Clarity of Place applied its proprietary diagnostic tool, PlaceBalance, to examine how locals (those living within a 50-mile radius) and visitors (those living beyond 51 miles) flowed to Old Town Scottsdale, WestWorld and TPC Scottsdale in 2023. For the two venues, Clarity of Place evaluated several events, some of which receive funding from visitor-paid bed-tax dollars as allocated by the Scottsdale Tourism Development Commission: Barrett-Jackson Collector Car Auction, American Quarter Horse Association’s Sun Circuit, Arizona Bike Week, and the WM Phoenix Open. The Maricopa County Home Show also was included to observe differences in events predominantly geared toward locals.

The 2024 Scottsdale Facility Usage Study analyzed the city and Experience Scottsdale’s available data from CoStar, Datafy and Placer.ai, as well as resident sentiment studies and historic population and visitor profile data.

Key Conclusions

- The city-owned venues and events analyzed are made possible because of visitors, as the city allocates visitor-paid bed-tax dollars to support, grow, upgrade and market the facilities and events. The study shows these same venues and events are enjoyed by locals at equal or greater levels than visitors. Visitors generally want to go where locals go.
 - On average, during the past 10 years, the city has invested nearly \$7.4 million in bed-tax revenue annually into tourism-related capital projects, and in 2023, \$4.1 million of visitor-paid bed-tax dollars funded more than 40 community and special events.
- Locals are repeatedly accessing Scottsdale’s venues and Old Town Scottsdale’s districts multiple times per month, thus outnumbering visitors throughout the year. Yet when looking at unique visits, visitors outnumber locals each month, excluding November and December.
 - Over four of the nine days of the Barrett-Jackson Collector Car Auction, visitors outnumber locals slightly.
 - Except for one day, the Sun Circuit attracts more visitors than locals.

- Arizona Bike Week has balanced attendance from locals and visitors, though Thursday and Friday of the event have a higher ratio of visitors.
- 85% of Maricopa County Home Show attendees are locals.
- During tournament play, there is a relative balance between locals and visitors to the WM Phoenix Open. A higher ratio of locals attends the practice rounds and Pro-Ams Monday through Wednesday.
- Visitors are spending their dollars at other hospitality businesses before and after events, generating revenue for area businesses and tax dollars for the community. Visitors frequent hotels, dining establishments, retail and other leisure activities in higher percentages than locals attending the same event.
 - Following the Barrett-Jackson Collector Car Auction, 41% of visitors traveled to dining establishments, hotels or other leisure activities, compared to 19% of locals.
 - For the WM Phoenix Open, 41% of visitors went to dining establishments, hotels or leisure activities after the event, compared to 14% of locals.
- Old Town Scottsdale is a draw for visitors observed at Scottsdale's hotels. Though locals outnumber visitors in Old Town Scottsdale daily, different districts see more visitors and locals.
 - Scottsdale Fashion Square and the Entertainment District see the largest number of daily locals, averaging nearly 16,000 and 5,200 locals, respectively.
 - Visitors are heading to Scottsdale Fashion Square, the Arts District, and the Fifth Avenue District, averaging over 4,250, 2,100 and 2,000 respective visitors daily.
 - Among Old Town's arts and cultural assets, Old Adobe Mission and Western Spirit: Scottsdale's Museum of the West had the most visitation by visitors when compared to visitation by locals.
 - Scottsdale Center for the Performing Arts, the Scottsdale Historical Society and the Scottsdale Museum of Contemporary Arts are bigger draws for locals.

Additional Study Details

- Market forces other than tourism may be impacting the community's perspectives of the impact of tourism and the balance among locals' and visitors' use of city venues.
- Maricopa County and the city of Scottsdale have witnessed tremendous population growth since 1990, and the areas surrounding the city-owned venues have seen moderate to dramatic population growth between 2010 and 2023. Read more about the city of Scottsdale's plans for future growth in the [General Plan 2035](#).
- In the study, Civic Center had the fewest number of visitors and the most fluctuation of locals, as much of Civic Center was closed due to construction for six months in 2023.

Contact

For additional information on the methodology and results of the study, please contact:

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