

Keynote Speaker



Ron Price
President & CEO
Visit Phoenix

#EDS25



Visit Phoenix & Visitor Industry Update

WESTMARC
May 2025

Ron Price,
President & CEO



Agenda

1. Who Is Visit Phoenix
2. Tourism Impacts
3. Attracting visitors
4. How are we promoting our destination?
5. Visitor profile
6. Power of Sports



What We Do

- We promote the Greater Phoenix community to a global audience of travelers.
- We book and assist conventions at the Phoenix Convention Center and area hotels and resorts.
- We cultivate and maintain relationships with convention and meeting planners, journalists and influencers, travel agents, and tour operators.
- We produce marketing and brand campaigns promoting leisure travel and meetings, and maintain the official tourism website for Greater Phoenix, [VisitPhoenix.com](https://www.VisitPhoenix.com).
- Economic Development – help attract industry related businesses to the valley as well as partner with greater Eco Dev community in promoting quality of life in the Valley.

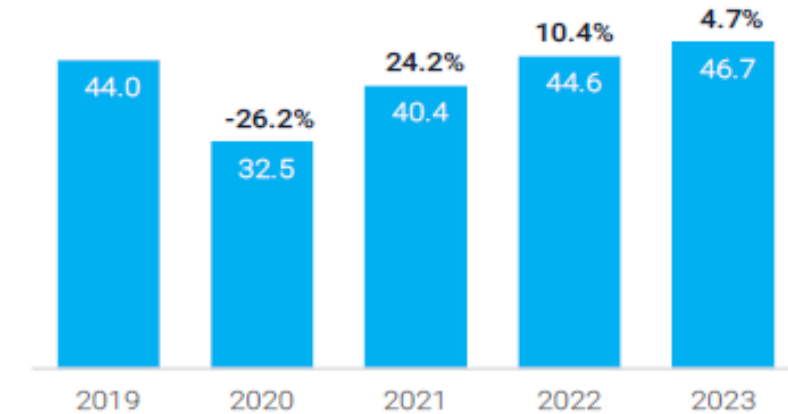


2023 Phoenix-Metro Visitation

- Record **46.7 million visitors**
 - 4.7% growth over 2022
 - 6.1% growth over 2019
- International visitors: **1.6M**
 - Approx. 200,000 less than 2019
- Record **\$12.9 billion direct visitor spending.**
 - 7.6% growth over 2022
 - 27.1% growth over 2019

Phoenix MSA visitor volume

Amounts in millions of visitors



2023 Economic Impacts



\$22.8B

Total
Economic
Impact



141,004

Total
Jobs
Generated



\$1.6B

State & Local
Taxes
Generated

Sky Harbor Performance

- 2024 record **52.3 million passengers**
 - +7.5% vs. 2023; +12.9% vs. 2019
 - International passengers +15%
- March 2025 YTD
 - Total passengers **-0.7%**
 - International passengers: +2%

Expanded Airlift

- New airlines added in 2024 (**Air France & Porter**)
- **Aeromexico**, Phoenix to Mexico City
 - Daily service began March 30, 2025
- **Air France** increasing service May 2025
 - From 3 to 5 days per week
 - Increasing size of aircraft from 279 to 328 seats
- **Domestic growth:** Little Rock, Detroit, Baltimore, Atlanta, Orlando, Austin, Seattle, Pittsburgh, San Diego



2023 Visitor Impacts – Jobs Supported

- Nearly 90,000 direct jobs supported
- More than 141,000 total jobs supported when including induced and indirect impacts.
 - Business Services: 10,700
 - Finance/Insurance/Real Estate: 9,190
 - Education & Healthcare: 6,100
 - Personal Services: 3,900
- Travel impacts all industries.

Employment impacts by industry (2023)

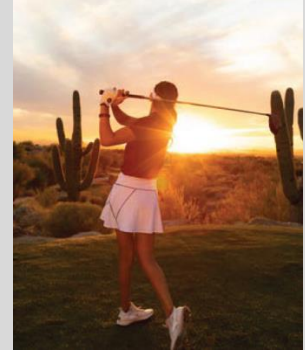
Amounts in number of jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	89,923	22,680	28,401	141,004
Food & Beverage	25,875	2,568	4,336	32,779
Lodging	30,506	6	87	30,599
Recreation and Entertainment	16,199	1,934	752	18,885
Other Transport	8,084	2,506	1,434	12,025
Business Services		7,283	3,483	10,766
Retail Trade	6,048	480	3,494	10,023
Finance, Insurance and Real Estate	1,301	4,240	3,649	9,190
Education and Health Care		138	6,003	6,141
Personal Services		1,137	2,783	3,920
Air Transport	1,319	38	153	1,510
Wholesale Trade		550	712	1,262
Communications		533	493	1,026
Government		495	316	811
Gasoline Stations	590	24	158	771
Construction and Utilities		417	266	684
Manufacturing		271	207	477
Agriculture, Fishing, Mining		60	77	137

Driving Visitor Demand & Interest

Key travel segments:

- Leisure Travel
 - Family vacations
 - Luxury Travel
 - Weekend escapes
 - Staycations
 - Outdoor recreation
- Group Tours & Travel Agents
- Meetings & Conventions
- Business Travel
- Sports & Events



Economic Impacts U.S. Sports Tourism in 2023



\$52.2B

Direct
Spending
Impact



\$128.0B

Total
Economic
Impact



757,600

Total
Jobs
Generated



\$20.1B

Total
Tax
Revenues



\$52.2 BILLION

Sports-related traveler spending
in 2023



\$13.5B TRANSPORTATION

Airfare, rental cars, taxis, buses,
parking, public transportation,
ride share



\$10.9B LODGING

Hotels, motels, private home
rentals, RVs



\$9.7B FOOD & BEVERAGE

Full-service restaurants, fast food,
convenience stores, alcohol



\$6.9B RECREATION

Amusements, theaters,
entertainment, and other recreation



\$6.5B RETAIL

Souvenirs, general merchandise,
malls, local retailers

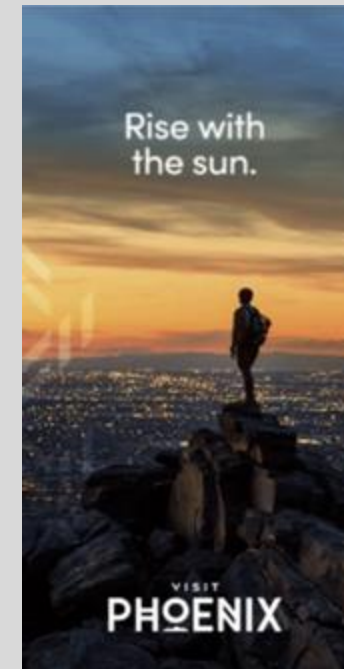
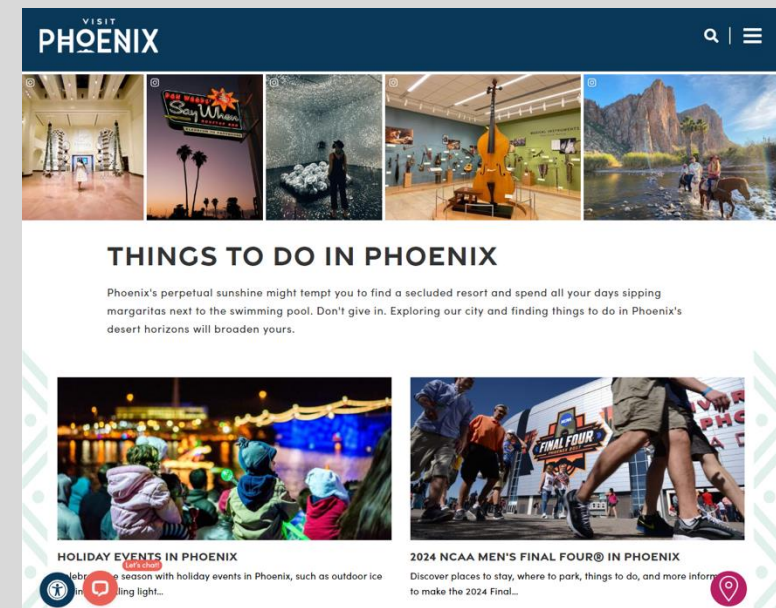


\$4.7B TOURNAMENT OPERATIONS

Event organizer and venue spending

Marketing Leisure & Meetings

- VisitPhoenix.com
 - 5.2 million visits in FY24
- Paid advertising
 - Leisure: 117M impression
 - Traditional & digital placements targeting key feeder markets.
 - Programmatic display, search, and CTV
 - Meetings, Conventions: 8.5M Impressions
 - Trade publications, newsletters
- International Marketing
 - Mexico, Canada, Europe...
- Social Media platforms
- Guides & Collateral
- Video & Photo production



Convention Sales & Services

- Booking
 - Phoenix Convention Center
 - #8 Convention Center in U.S, WSJ
 - Hotels & Resorts
- Sales Efforts
 - Industry Tradeshows
 - Sales Missions
 - Familiarization Trips
 - 3rd Party Partnerships
- Convention Services
 - Assist meeting planners after booking destination with transportation, catering, A/V, off-site venues and more
 - Pre-planning site visits.
 - 300 leads and more than 7,600 referrals sent to area businesses FY24.

FY24 Sales Production



\$605.8 MILLION

estimated direct spend generated this fiscal
(booked in FY 23/24)

482,269

total
delegates
booked

721,330

total room nights booked
by Visit Phoenix sales
department FY 23/24

4,311

total leads received
(those leads account
for total room nights)

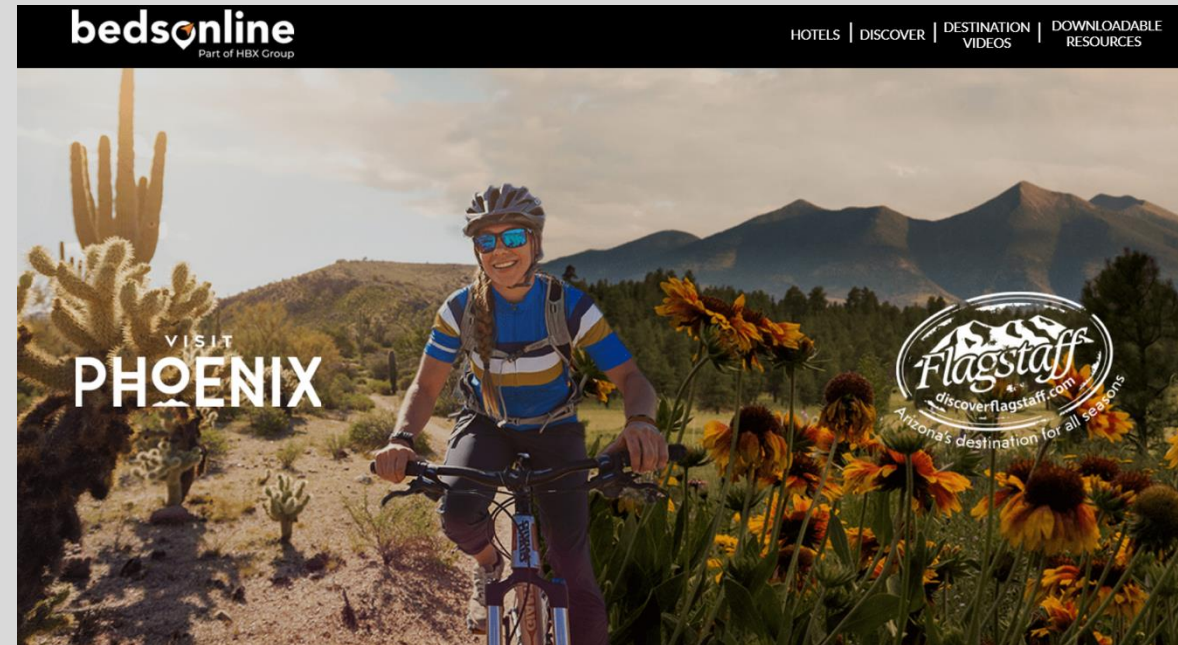
588

total meetings booked
into PCC and hotels and
resorts during FY 23/24



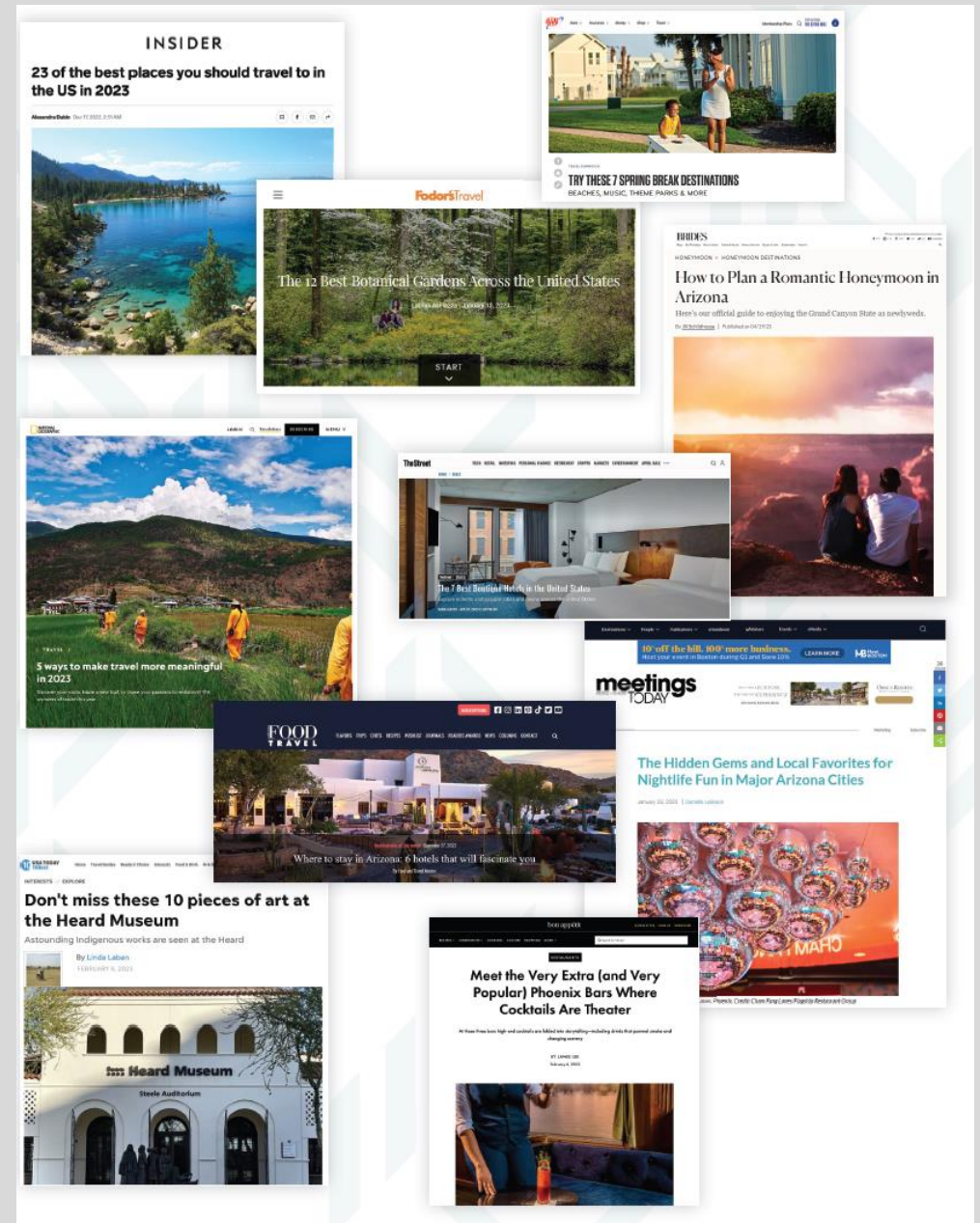
Travel Industry Sales

- Facilitating travel and tourism-related services with travel agencies, tour operators, airlines, hotels, and other businesses that cater to travelers.
- Sample clients: AAA, Bonotel, ALG Vacations, Virtuoso, Costco Travel.
- Sales & Marketing Efforts
 - Sales Missions
 - Tradeshows
 - Agency Trainings
 - Familiarization Trips
 - Site Visits
 - Airlines
- Key for international promotions



Media Relations

- Oversees local, regional, national, and international media relations and communications efforts.
- Position Phoenix as a leading destination for leisure travel and business events.
- Stakeholders, include journalists, editors, travel writers, content creators.
- 108 Top-Tier and Trade articles generated in FY 24.



Domestic Visitor Profile

- Main purpose of Trip
 - 50% Visiting Friends & Relatives
 - 13% for business and conventions
 - 36% for marketable trips
 - City, outdoor, events, golf, tours
- 37% arrival by plane
 - higher than the national average.
- Nearly 75% stayed in paid accommodations.
- Avg. party size 2.7
 - 39% travel parties have children
- Spend an avg. of 3 nights in destination
- Top activities
 - Shopping, dining, sightseeing, outdoor recreation, historic sites, museums

Outdoor Activities

**50%**

U.S. Norm: 47%

Entertainment Activities

**57%**

U.S. Norm: 54%

Cultural Activities

**34%**

U.S. Norm: 28%

Sporting Activities

**31%**

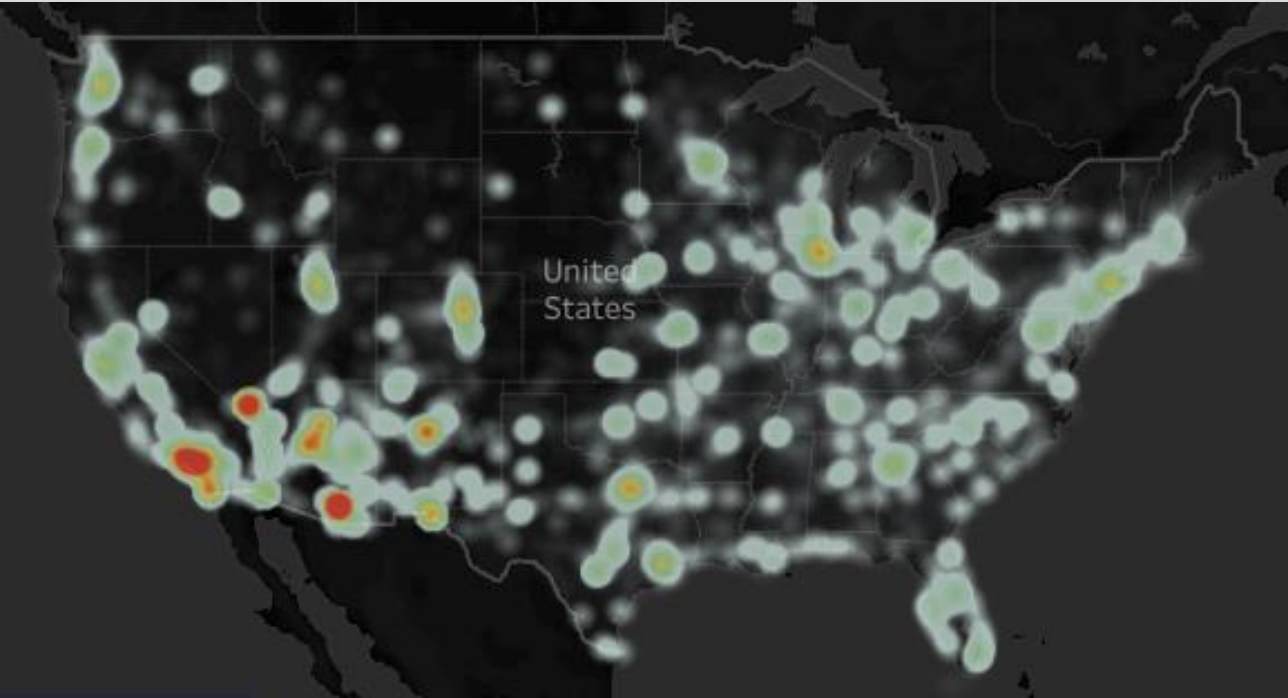
U.S. Norm: 20%

Business Activities

**19%**

U.S. Norm: 15%

Domestic Overnight Visitor Origin Markets, January – December 2024



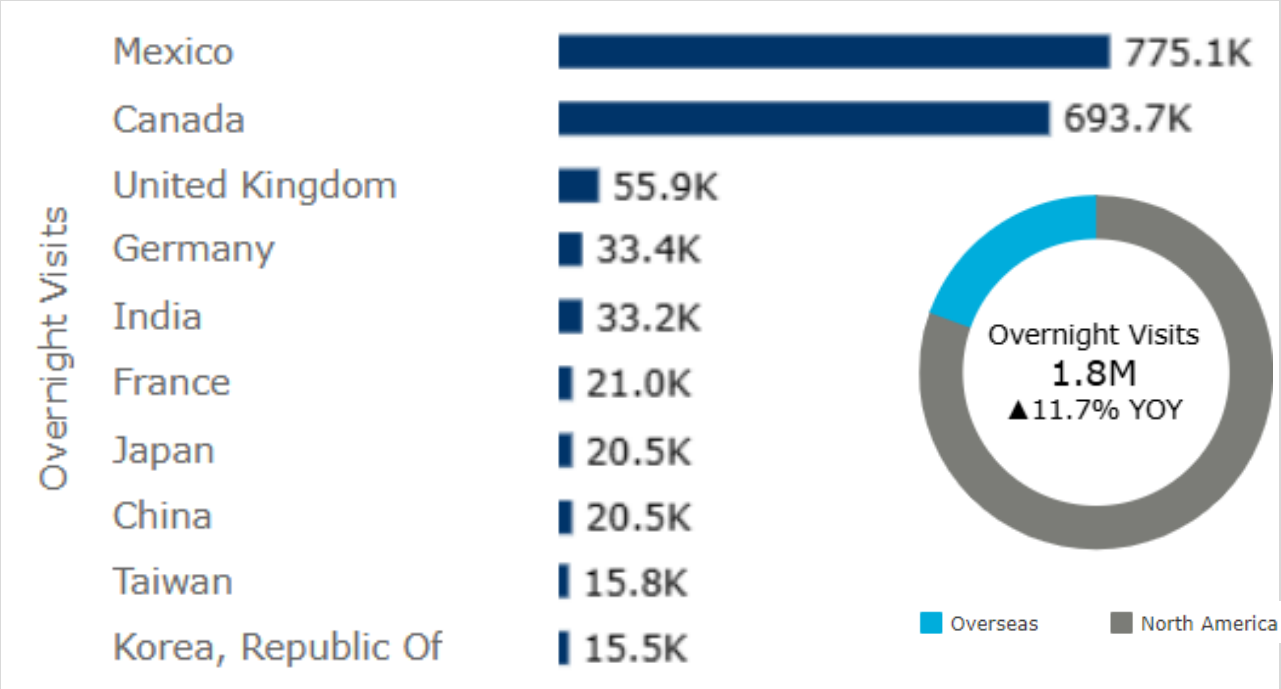
Top Visitor Origin MSAs

% share of total

Los Angeles-Long Beach-Anaheim, CA	6.9%
Tucson, AZ	6.4%
Las Vegas-Henderson-North Las Vegas, NV	4.3%
Riverside-San Bernardino-Ontario, CA	3.6%
Prescott Valley-Prescott, AZ	2.7%
Chicago-Naperville-Elgin, IL-IN	2.5%
San Diego-Chula Vista-Carlsbad, CA	2.2%
Dallas-Fort Worth-Arlington, TX	2.2%
Albuquerque, NM	2.1%
Flagstaff, AZ	1.8%
New York-Newark-Jersey City, NY-NJ	1.8%
Seattle-Tacoma-Bellevue, WA	1.7%
Denver-Aurora-Centennial, CO	1.6%
Houston-Pasadena-The Woodlands, TX	1.4%
El Paso, TX	1.4%

2024 Top 10 International Visitor Markets Phoenix-Metro by Overnight Visits*

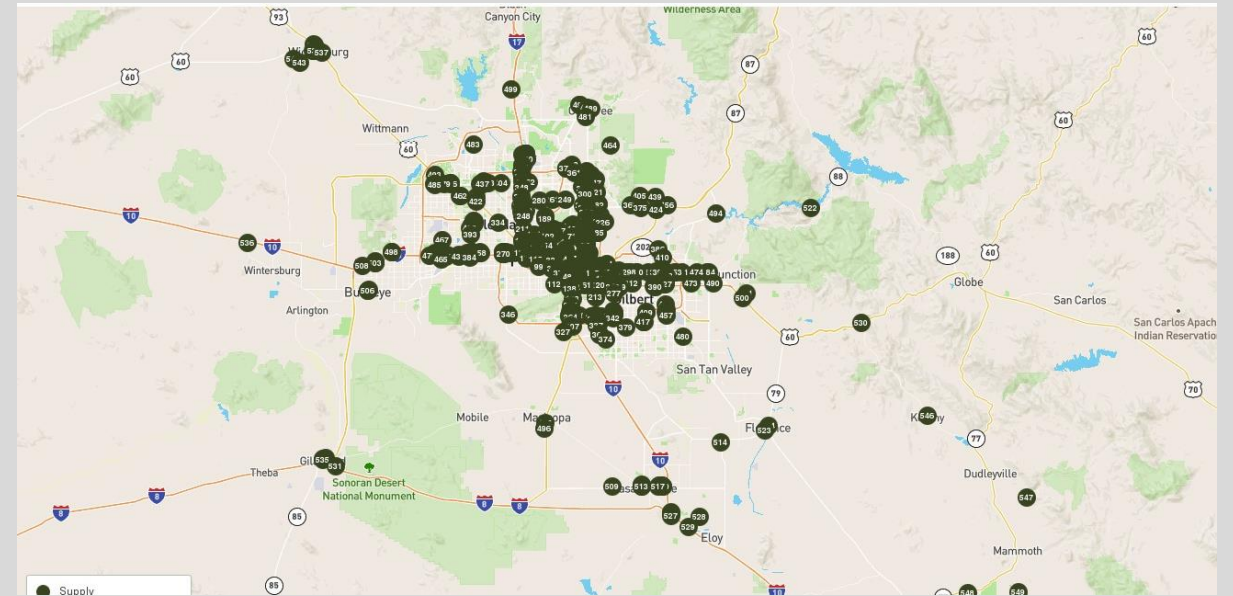
- International visitors represent 5% of visitation.
- Mexico & Canada account for 80%
- Still below pre-covid peaks
 - Mexico, India and Taiwan only markets to surpass 2019 levels.
- International visitors spent \$1.4 billion in 2024



Accommodations Overview

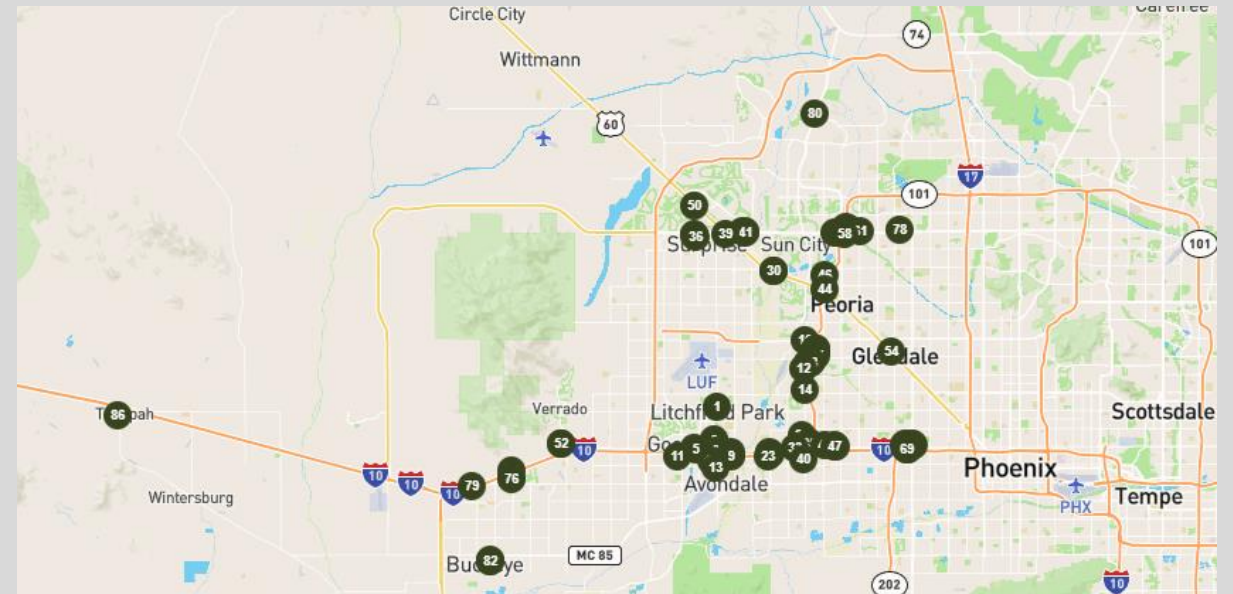
- **Phoenix Metro**

- 558 properties; 71,850 hotel rooms
- Vacation rentals: 22,500
- 2024 Room Demand Growth: 1%
 - Hotels: 0.5%
 - Vacation Rental: 2.9%
- 10th largest U.S. hotel markets by rooms.



- **Phoenix-West Submarket**

- 37 Properties; 4,589 hotel rooms
- Vacation Rentals: 3,796
- 2024 Room Demand Growth
 - Hotels/Resort: +4.8%
 - Highest demand growth out of 8 submarkets
 - Vacation Rentals: -4.8%



Accommodations Performance

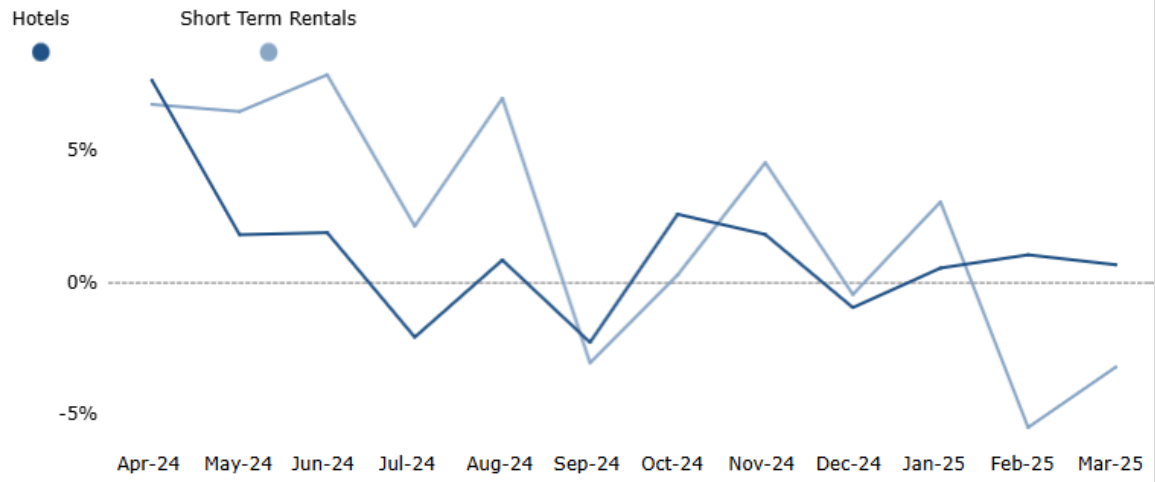
March 2025 YTD

Phoenix-Metro

Percent change from 2024

	Demand	Supply
Hotels	+0.7%	+2.0%
Vacations Rentals	-2.3%	-2.4%

Demand vs. Previous Year

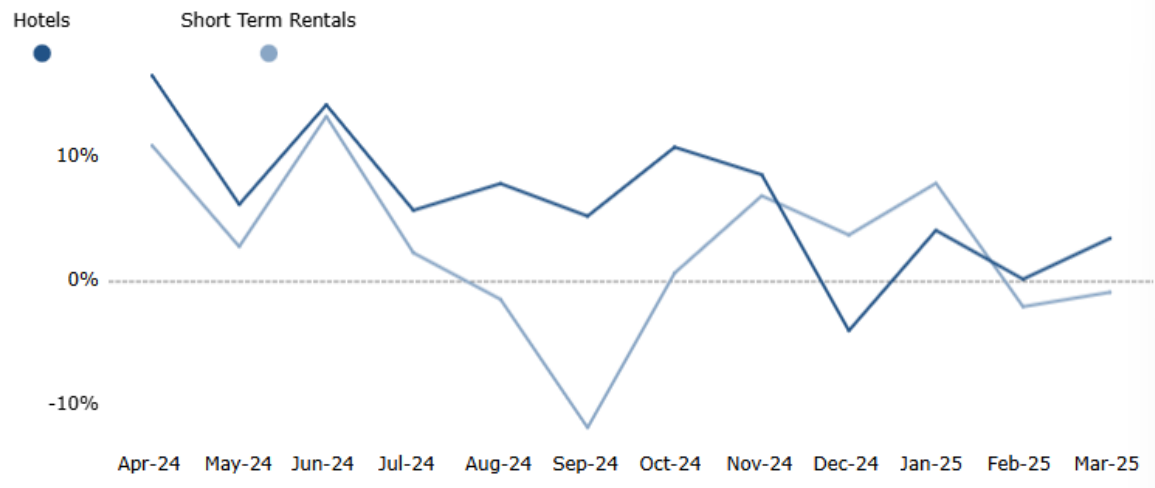


Phoenix-West

Percent change from 2024

	Demand	Supply
Hotels	+1.3%	+3.6%
Vacations Rentals	+0.7%	+1.3%

Demand vs. Previous Year



Phoenix-Metro & Phoenix-West Hotel Pipeline

as of April 2025

Phoenix-Metro

Status	Properties	Rooms
In Construction	31	4,650
Final Planning	51	6,820
Planning	44	6,223
Grand Total	126	17,693

Largest Hotel Pipeline in the U.S*.

- 1. Dallas, TX
- 2. Atlanta, GA
- 3. Nashville, TN
- 4. Phoenix, AZ
- 5. Austin, TX

Phoenix-West

Status	Properties	Rooms
In Construction	12	2,242
Final Planning	14	2,215
Planning	8	731
Grand Total	34	5,188

- Largest hotel pipeline of the metro area's 8 submarkets.
- Hotel supply would more than double if all properties open.
- Openings would be distributed over many years.
- Mostly limited service and extended stay properties with 50-+150 rooms

Major Hotel Developments

Remi Scottsdale Autograph Collection



- Opening June 2025
- Boutique style hotel
- 161 rooms
- 3 restaurants
- Meeting space & fitness center
- Rooftop pool & bar
- In Entertainment District

Scottsdale, Scottsdale Rd & Camelback

Ritz-Carlton Paradise Valley



- Est. open Q2 - 2026
- 225 rooms, Luxury property
- 122 acres
- 20,000 sq. ft. meeting space
- The Palmeraie
 - Luxury retail, dining, residences.

Scottsdale, Scottsdale Rd. & Lincoln Dr.

VAI Resort



- Est. open late 2025
- \$1 billion development
- 1,100 rooms, 4 towers
- Five-acre swimming oasis, two-story nightclub, party island, premium dining experiences.
- Spa and fitness center
- 8,000 seat amphitheater

Glendale, 95th Ave. and Cardinals Way

Reverb by Hard Rock



- Est. open Q3 2028
- First Hard Rock in Arizona
- Designed for music fans
- 195 rooms
- Rooftop bar
- The Sydney mixed-use development

Salt River Pima-Maricopa Indian Community, 90th St & Loop 101.

Information subject to change

Attraction Developments

Revel Surf at Cannon Beach



Mesa, Warner Rd. & Power Rd.

- Est. open late 2024
- 37-acre mixed use development
- 700,000 sq. ft. indoor space
- First surf park dev. in the world to feature large traveling wave AND stationary rapid surf wave in one park
- Plans include space for 150 room hotel

International Dark Sky Center



Fountain Hills, La Montana & Ave of Fountains.

- Est. opening late Fall 2025
- \$25 million project, 23,000 sq. ft. facility
- One of only two International Dark Sky Communities near a major metro area
- Plans for planetarium & theater/auditorium

Mattel Adventure Park



Glendale, 95th Ave. and Cardinals Way

- Opening late 2025
- World's first Mattel Theme Park
- 161,000 square feet of "highly-themed" air conditioned space.
- Barbie Dream House, mini golf, go-karts, Hot Wheels roller coaster and Thomas & Friends electric train, Masters of the Universe laser tag

Pure Pickleball & Padel



Scottsdale, Loop 101 & Via de Ventura

- Plans to open in 2026
- 48+ courts indoor & outdoor
- 1,200-Seat Pro Arena
- Plans for member clubhouse with restaurant & bar, rooftop courts, lockers and member amenities
- USA Pickleball to relocate HQ when facility opens

Information subject to change



Arlington, TX Entertainment District

\$4 Billion development

- Entertainment District – Texas Live
- 1,200 Lowe's hotel rooms
- Convention Center
- Medal of Honor Museum
- Residential
- 365 day activation

"Not rocket science - political will, great partners, and a city that says 'we can, we do!' with a focus on ringing the cash register."





VISIT PHOENIX



City of Avondale



Cheryl Covert
Economic Development Assistant Director

Jenn Stein
Economic Development Director

AVONDALE ASSETS



327,748
Tri City Population
(Avondale, Goodyear,
Buckeye)



124,305
2029 Population
within 3 miles



40%
Metro's population
growth that will occur
in the West Valley by
2030



235,099
Daily Traffic Count
in the heart of Avondale
along Interstate-10



32
Median Age



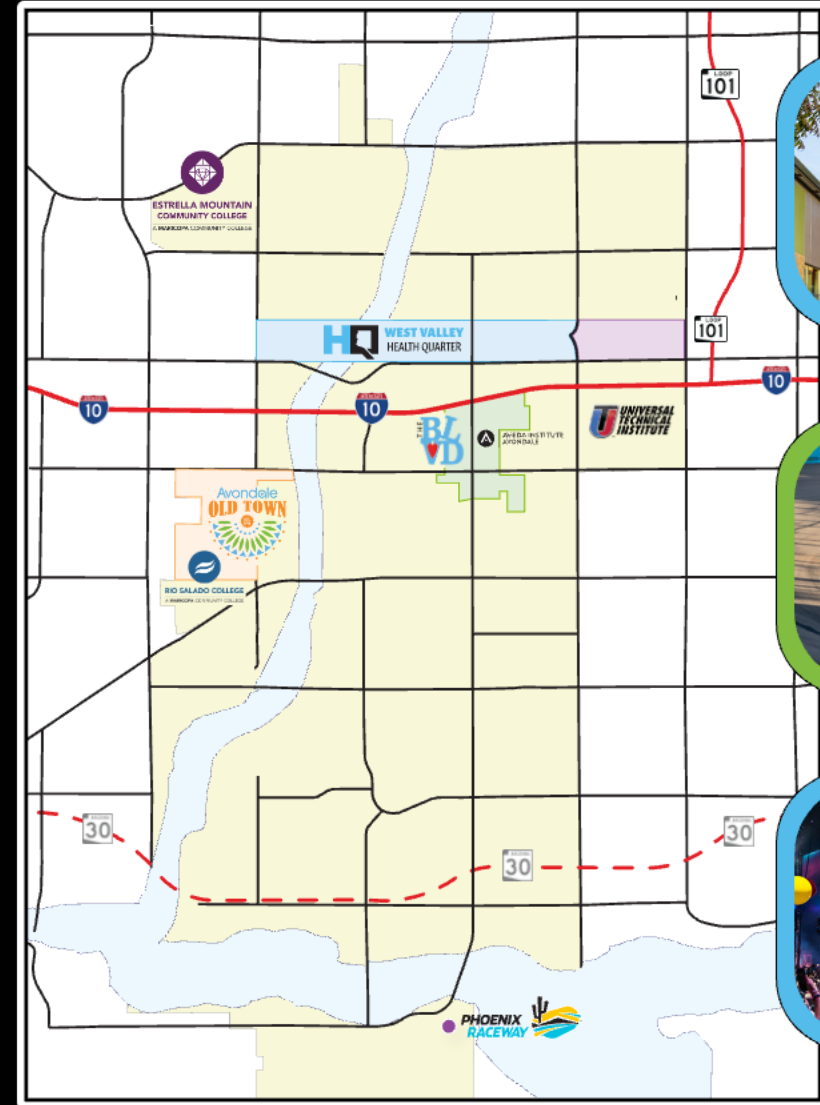
1.8M
Visitors Per Year



77%
Households that are
Families

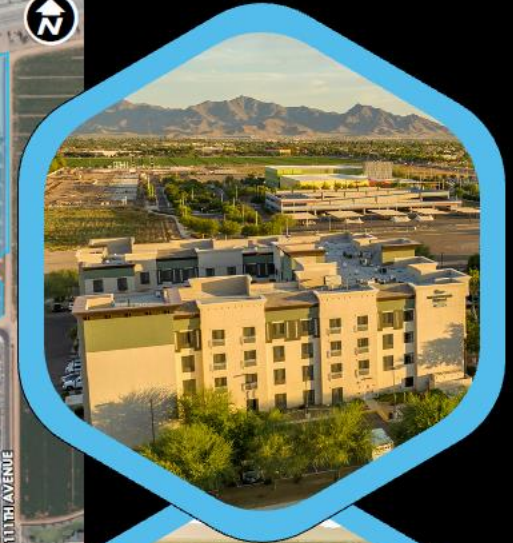
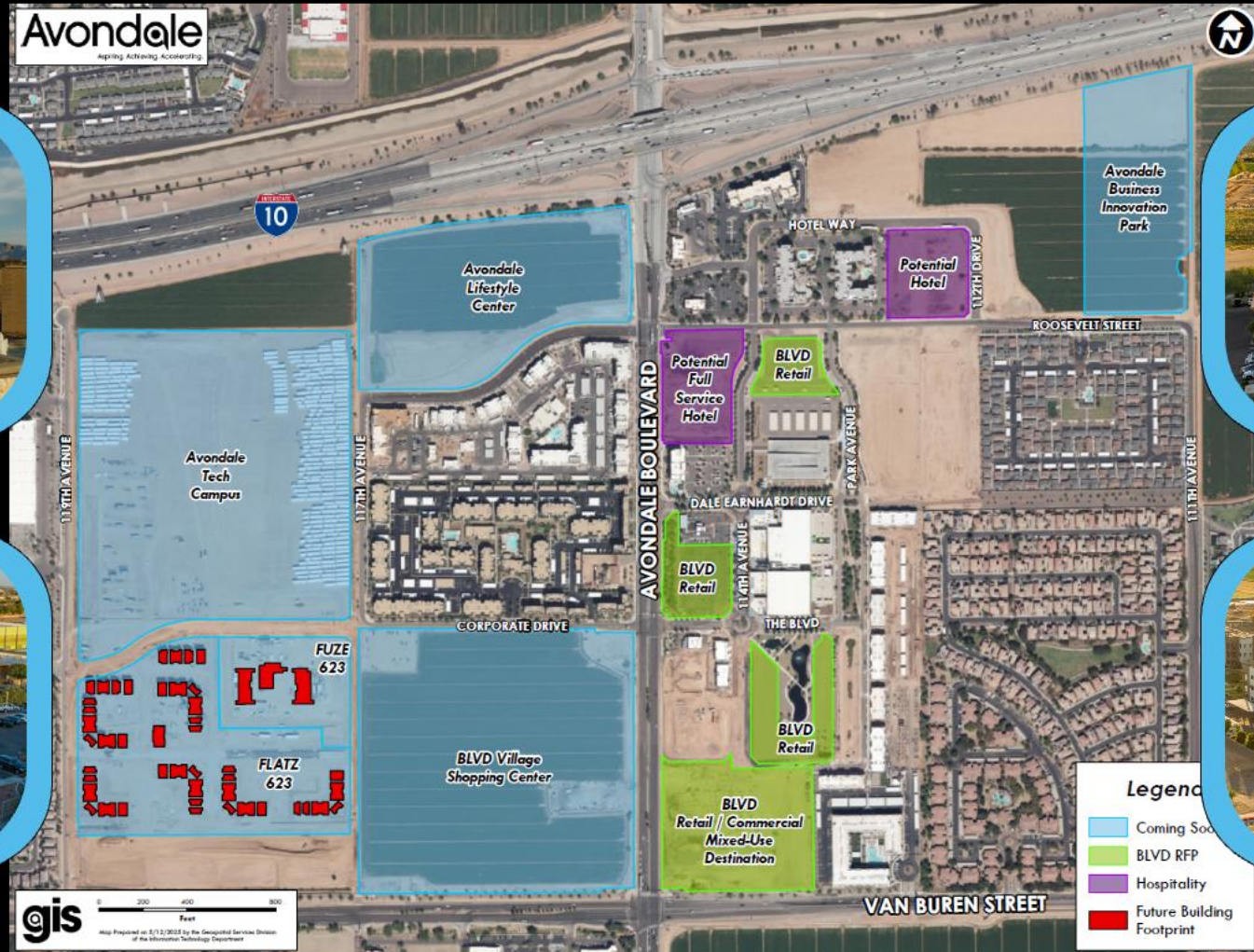


\$117,686
Average Household
Income within 5-mile
radius of I-10



Avondale
Economic Development

AVONDALE OPPORTUNITIES



City of Buckeye



Suzie Boyles
Economic Development Director

CITY OF BUCKEYE: TOURISM



Buckeye Air Fair

- Buckeye Municipal Airport
- 3rd Largest Air Show in U.S.
- 36,000 Visitors / 3 days
- 623 Fly-in air operators
- 2,000 Field trip attendees
- 8 Airshow acts
- 76 AOPA Exhibitors

Additionally:

- Skydive Arizona



Skyline Regional Park

- 8,600 Acre regional park
- 100,000+ Visitors annually
- 22.5 Miles of hiking trails
- Overnight camping
- White tanks mountain range
- Features accessible trail for ADA & strollers
- Stargazing without city lights
- Hiking Yoga and more...



Buckeye Race to the Runway

- Boston Marathon Qualifier
- 11th Year
- Buckeye Municipal Airport
 - 1,635 participants
 - U.S. (38 states) – 1,611
 - Canada – 23
 - Brazil - 1
- Marathon, Half Marathon, 10K, 5K, 1 mile

GROWING BUCKEYE



Location: I-10 & Verrado Way

Size: 2,100 acres = 3.4 sq. miles

The Landing in Buckeye is envisioned to be West Valley's premier destination for all things recreation, entertainment, working, shopping and living. This plan will create a unique district that attracts residents and visitors from great distance and allow businesses to thrive.



Location: MC85 / Monroe Ave & 4th Street

Size: 1.4 miles

Downtown Buckeye is thriving as revitalization efforts bring fresh energy and growth. New businesses, local eateries, and unique shops are creating a vibrant hub of activity. With strong community support and ongoing investment, it's quickly becoming a lively and charming destination.

Experience Glendale



Lori German
Deputy Director - Economic Development,
Tourism, Communications

#EDS25



Highlights:



- Visit Glendale Rebrand
- Visits to S & E



- 1,700 rooms



- Entertainment
 - Andretti
 - Dick's House of Sport



- Tanger
- Arrowhead
- Cardinals Way

ARIZONA'S *destination for*
SPORTS & ENTERTAINMENT



Recent Investments & Opportunities



Investments

- Renaissance
- Tanger
- Desert Diamond



Sports & Entertainment

- 200+ Acres
- 91st Ave/Glendale
- 93rd Ave/Glendale



Downtown Glendale

- DCRP
- Hilton
- Retail

ARIZONA'S *destination for*
SPORTS & ENTERTAINMENT

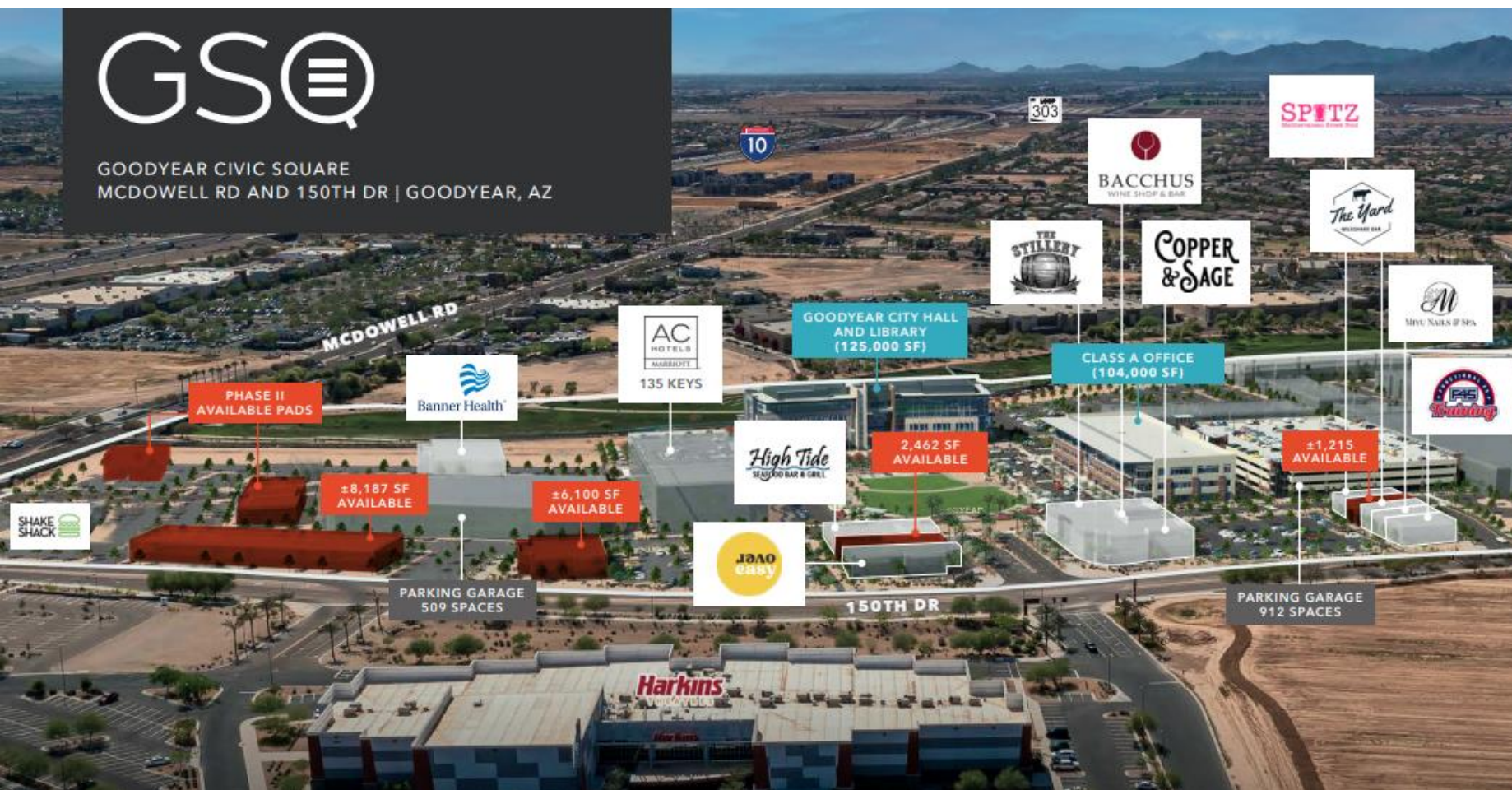
City of Goodyear



Joe Stewart
Senior Business Development Manager

GSQ: Goodyear's First Downtown

You're in
Good
company.



Goodyear Ballpark Village RFP

You're in
Good
company.

- Summer 2025 RFP for visionary development partners
- 58 city-owned acres primed for growth
- Flexible mixed-use zoning
- Surging rooftops and new residential nearby
- Surrounded by major employment clusters



City of Litchfield Park



Randy Proch
City Planner

CHARMING BY CHOICE



\$125K

MEDIAN INCOME

46%

BACHELORS

7,016

POPULATION

165,585

WITHIN 5 MILES

A+

LESD

20 MIN

TO DOWNTOWN

WHAT THE VALLEY IS MISSING

An aerial rendering of a proposed urban development project. The site is a 26-acre mixed-use area. It features three large, rectangular green fields arranged in a row. To the left of the fields is a curved road with a dedicated bike lane. In the center, there is a paved plaza with a grid of palm trees and a small, modern white building. To the right of the plaza is a large parking lot. The entire development is bordered by existing city streets and parking areas. The background shows a typical suburban neighborhood with houses and trees.

26 ACRE

LITCHFIELD SQUARE

300K

MIXED-USE

LESS

PARKING REQ.

NO QSR

CURATED CULINARY

FASTEST

PROJECT REVIEW TIMES

City of Peoria



Brian Carpenter
Economic Development Deputy Director

DOWNTOWN PEORIA

04.30.25

HIGHLIGHTS:

W/IN 30 MINS OF DOWNTOWN PEORIA

864K

EMPLOYEES

2.4

MILLION PEOPLE

36.6

MEDIAN AGE

\$64K

MEDIAN DISPOSABLE INCOME

41%

W/ ASSOCIATES DEGREES OR
HIGHER

ESRI



DOWNTOWN DEVELOPMENT FOCUS



MARLOWE PEORIA PLACE



CALIBER BY GREYSTAR



CALDWELL COUNTY BBQ GROUND BREAKING



CALDWELL COUNTY BBQ RENDERING



JEFFERSON HOUSE RENDERING

ACQUIRE



ATTRACT



ACTIVATE



ACCENTUATE



TOURISM & ENTERTAINMENT

QUICK FACTS:

208k

2025 POPULATION

5%

GROWTH RATE

290k

EST. 2040 POPULATION

\$93.4k

MEDIAN HOUSEHOLD INCOME

\$584.7k

AVERAGE HOME VALUE

41

AVERAGE AGE

CENSUS.GOV



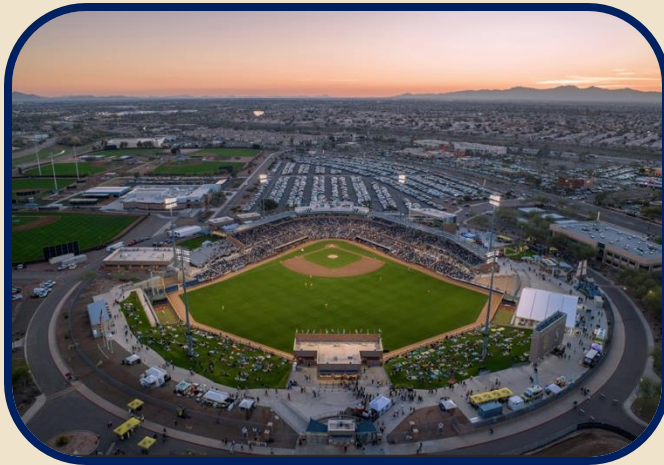
LAKE PLEASANT



QUINTERO GOLF CLUB



HOME2 SUITES RENDERING



PEORIA SPORTS COMPLEX



PARK AT P83



STADIUM POINT RENDERING



PEORIA IS THE PLACE

SCAN TO CONNECT W/ US



City of Phoenix



City of Phoenix

Karla Scott

Economic Development Program Manager



West Phoenix: An Entertainment Pioneer

- 169 Sq mi
- Talking Stick Resort Amphitheatre
- American Family Fields of Phoenix
- Parks and Preserves
 - South Mountain
 - Deem Hills
 - Adobe Dam Recreation Area
 - Tres Rios Riparian Preserve
- Collegiate Sports and Entertainment



Phoenix is

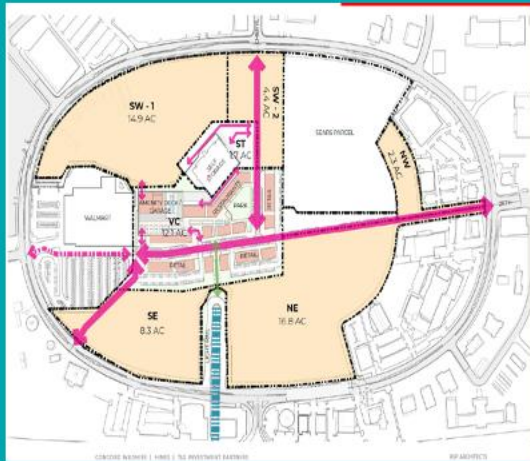


Halo Vista

- 2,500 Acres mixed-use development
- 500K SF Retail/Entertainment/Hospitality/Automall



The Metropolitan



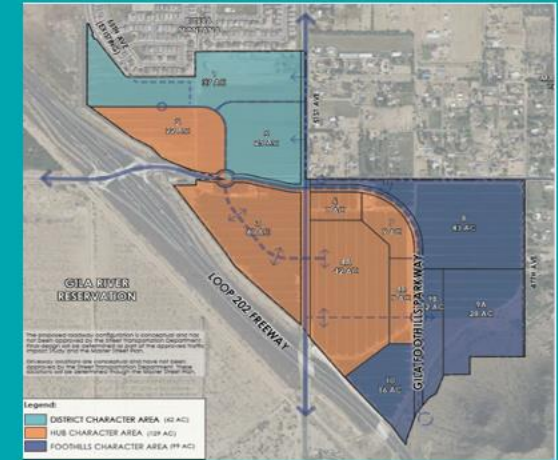
Sheely Commerce Center



Laveen Towne Center



Gila Foothills



City of Surprise



Mike Hoover
Economic Development Assistant Director

The Adventure Starts Here!

Highlights:

- Surprise Recreation Campus
- Outdoors - White Tanks, Golf
- Indoor Fun: Axescape, FatCats, Player 1 Arcade, AMC Theatres, Uptown Alley
- Art: Public Arts, Venues
- Shopping - Surprise Marketplace, Village at Prasada, Loop 303 Retail Corridor
- 10 Hotels - 3 Currently Under Construction
- Campus Life at City Center - OUAZ



Surprise Tourism of Tomorrow:

The Elm Street Downtown Experience



Both in-person &
in the metaverse!

Major Healthcare Development



A vision for
Medical Tourism

On the Map: Spark Surprise



A hub for
entrepreneurs everywhere

Town of Wickenburg



Town of Wickenburg

Tim Suan
Deputy Town Manager

Wickenburg – *Rooted in the Real West*

- **Historic Downtown Charm**
- **Gold Rush Days and Wickenburg WestFest**
- **Guest Ranch Experiences**
- **Rodeo Action and Western Traditions**
- **“Rodeo Roping Capital of the World”**



Discover Historical **WICKENBURG** FOUNDED 1863

- **Desert Caballeros Western Museum**
- **Del E. Webb Center for the Performing Arts**
- **Vulture Mountain Recreation Area**
- **Vibrant Shows, Festivals, and Events**
- **Authentic Arizona**

