



Destination Update

Stephanie Pressler

Director of Community & Government Affairs

Experience Scottsdale

Kate Yordi

Director, Marketing

Visit Mesa

Eric Kerr

Vice President, Insights & Development

Visit Phoenix



EXPERIENCE SCOTTSDALE



TOURISM BY THE NUMBERS

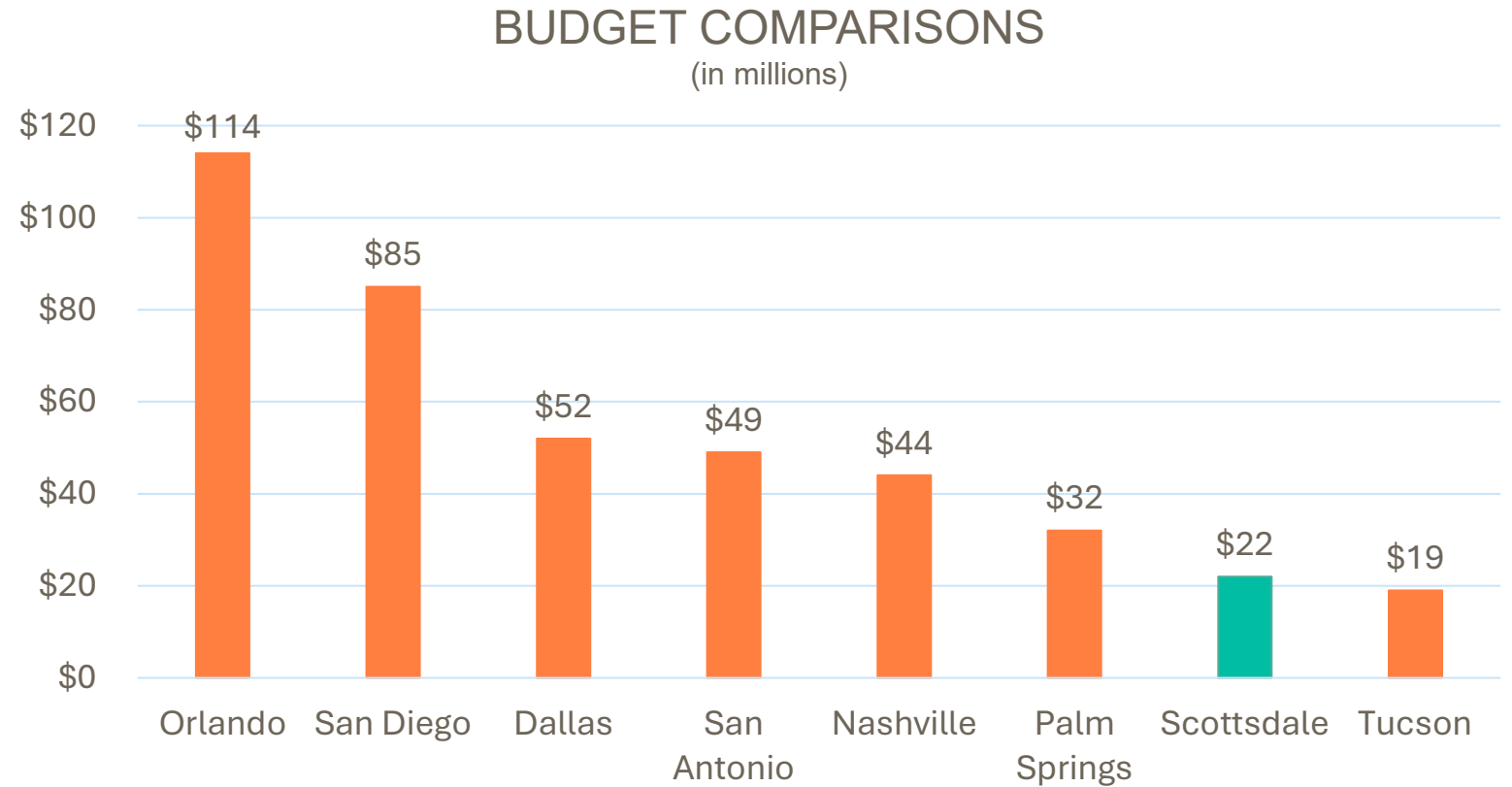
- **11.7 million** visitors to Scottsdale
- **\$3.7 billion** economic impact
- **\$2.4 billion** in visitor-related spending
- **\$75.8 million** in tax collections
- **28,500+** jobs directly attributable to tourism

Source: Longwoods International and Applied Economics; based on 2024 visitation.



STAYING RELEVANT & COMPETITIVE

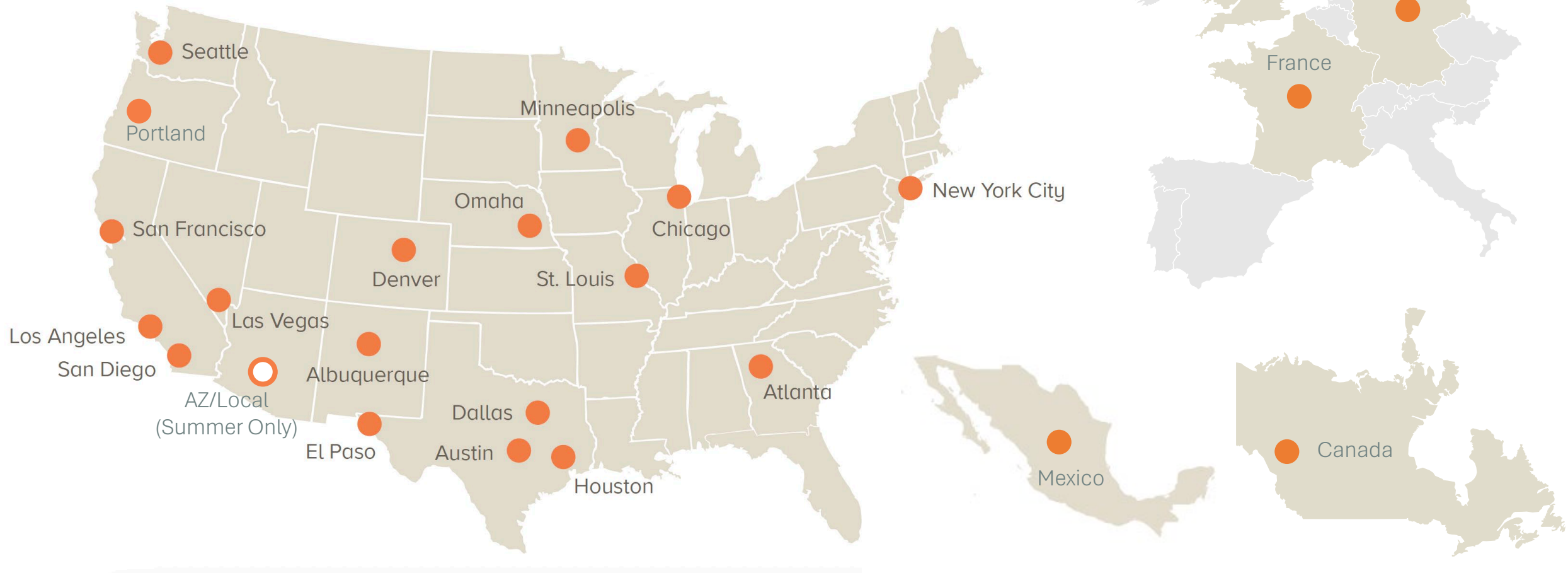
- Geolocation data
- Brand research
- Hotel metrics
- Golf course metrics
- Airport passenger counts
- Meetings research
- Customer advisory board
- Meetings focus groups
- International spending data
- Industry trends



Source: Civitas Pro, based on 2022, 2023 budgets.



TARGET LEISURE MARKETS



TARGET AUDIENCES

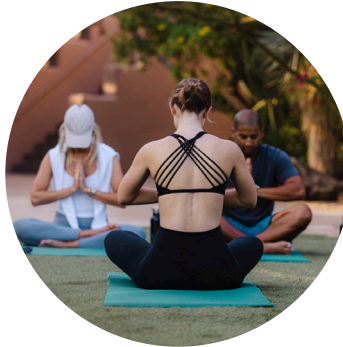


The Sports Goer

These die-hards only care about the four seasons – baseball, football, basketball and hockey. Well, let's not forget about golf too.

Foodies

Hungry for a robust life, great food, good drinks, and all the sweet (re)treats Scottsdale has to offer.



The Wellness Warrior

Total alignment of mind, body and soul is all that matters to these zenned-out explorers.

The Family Unit

These tight-knit travelers don't know the meaning of going it alone. The easier it is to access an array of amenities, the better.



Indulgent Individual

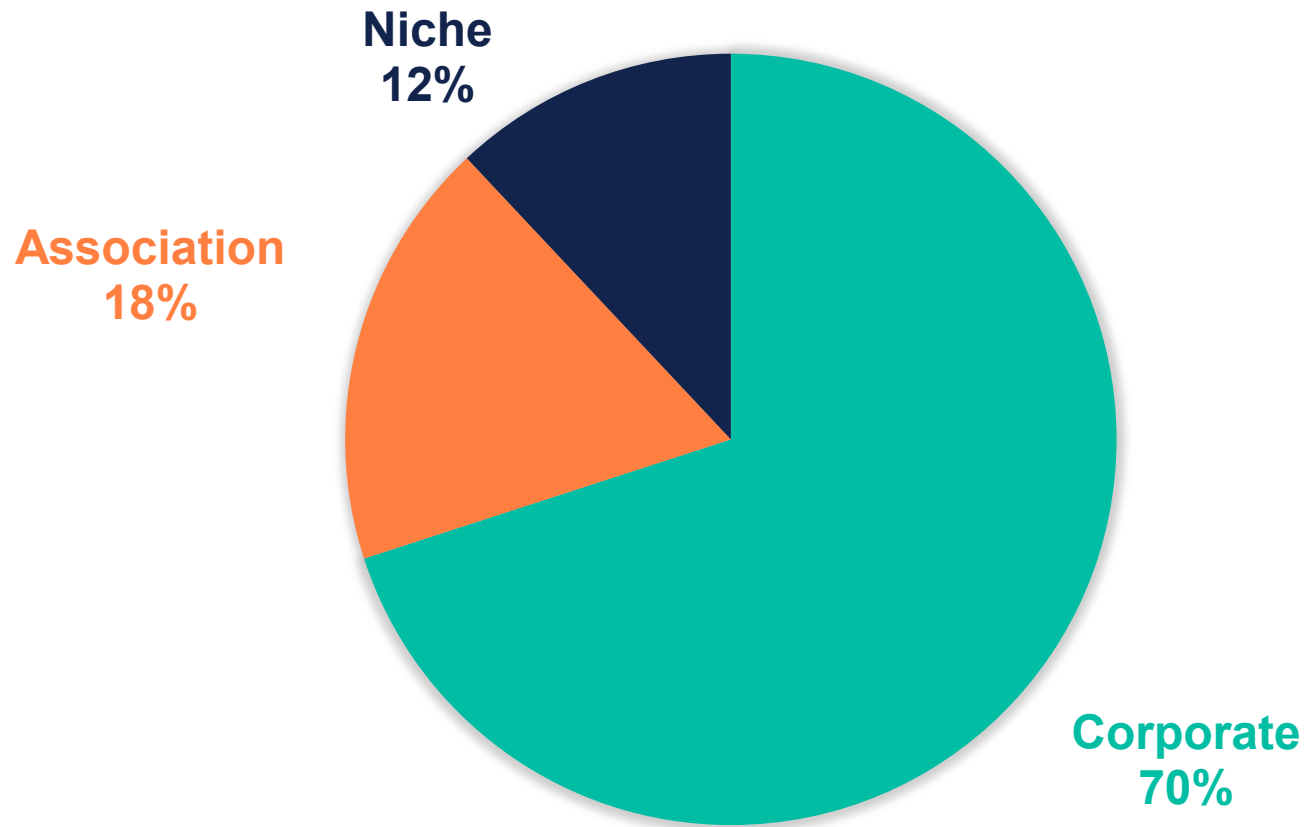
They work hard and play even harder. This traveler wants to reward themselves in every sense of the word; from relaxation to recreation.

Luxury Traveler

Only the best will do for this indulgent traveler. They expect every detail to be attended to and thrive off relaxation and rejuvenation.



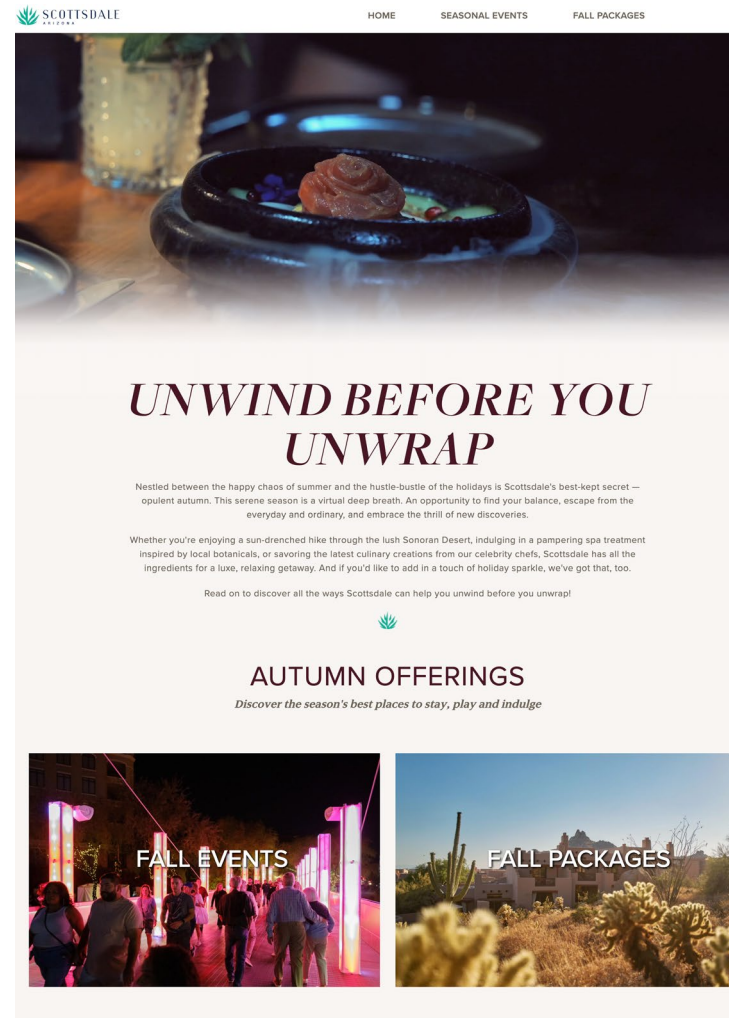
TARGET MEETINGS MARKETS



Corporate	Market %
Communications	0.5%
Financial	12.3%
Healthcare	8.6%
High Tech	5.9%
Insurance	5.0%
Legal	1.2%
Manufacturing	6.4%
Miscellaneous	19.0%
Pharmaceutical	7.2%
Retail	3.4%



MARKETING CAMPAIGNS



HIGH-IMPACT ACTIVATIONS



HIGH-IMPACT SPONSORSHIPS



INTERNATIONAL PROMOTIONS



SCOTTSDALE
ARIZONA

VisitTheUSA.mx

Descubre Scottsdale, Arizona

Hasta
18%
de descuento
en hoteles.

Sujeto a disponibilidad y a cambios.



Le Point
Stories

Politique International Débats Économie Culture Style Services Événements

1. Une ville d'art à ciel ouvert

Le Désert de Sonora est depuis longtemps une source d'inspiration artistique avec son ciel dégagé, ses montagnes escarpées et ses paysages spectaculaires ; en fait, Scottsdale est l'une des villes les plus artistiques des États-Unis. Avec plus de 125 galeries et une scène culturelle florissante, elle rivalise avec Santa Fe ou encore Los Angeles. Le *Scottsdale ArtWalk*, qui a lieu chaque jeudi soir, est une institution : les galeries ouvrent leurs portes en nocturne, offrant aux visiteurs une immersion dans l'art local et international.

Mais l'art ne se limite pas aux galeries. La ville elle-même est un musée à ciel ouvert. En vous baladant dans le quartier historique de Old Town, vous croirez des sculptures monumentales, des fresques murales colorées et des installations interactives. Ne manquez pas le **Scottsdale Museum of Contemporary Art (SMoCA)**, qui présente des expositions audacieuses et innovantes. Les amateurs d'architecture seront également comblés avec **Taliesin West**, l'ancien refuge hivernal de Frank Lloyd Wright, classé au patrimoine mondial de l'UNESCO, ainsi que le **Cosanti** et le **Soleri Bridge & Plaza** de l'architecte d'origine italienne Paolo Soleri.



© Analisa Shah Experience Scottsdale



HOTEL & RESORT PIPELINE

Newly Opened

The Remi Scottsdale, Autograph Collection

Coming Soon

AC Hotel Scottsdale Old Town

Under Construction

Scottsdale Golf Retreat at Troon North

Ritz-Carlton Paradise Valley, The Palmeraie

Rebranding

Kimpton Miralina Resort & Villas

Hotel Solaya, a JdV by Hyatt brand

Proposed & Planning

Axon Hotel Scottsdale

Element Scottsdale North

Tapestry Collection by Hilton

Noble House Hotels & Resorts Paradise Valley

Reverb by Hard Rock

SLS Scottsdale

SmokeTree Resort

The Parque

The Scottsdale EDITION

Tribute Portfolio Hotel Phoenix Scottsdale

Source: CoStar



UPCOMING EVENTS

- Vrbo Fiesta Bowl – Jan. 8
- Arizona Concours D'Elegance – Jan. 18
- Rock 'n' Roll Marathon – Jan. 17-18
- Barrett-Jackson Scottsdale Auction – Jan. 17-25
- Celebration of Fine Art – Jan. 17 – March 29
- Scottsdale Western Week – Jan. 24 – Feb. 1
- Parada del Sol Parade – Jan. 31
- Arizona Indian Festival – Jan. 31 – Feb. 1
- WM Phoenix Open – Feb. 2-8
- Scottsdale Arabian Horse Show – Feb. 12-22
- Cactus League Spring Training – Feb. 20 – March 24
- Scottsdale Ferrari Art Week – March 19-22
- NCAA Women's Final Four – April 2-5

Visit ExperienceScottsdale.com/Events for more.





THANK YOU!

Stephanie Pressler

Director of Community & Government Affairs

spressler@experiencescottsdale.com



SCOTTSDALE
ARIZONA



VISIT  MESA
CITY LIMITLESS®

VISIT MESA UPDATE

Mesa's Visitors Snapshot (2024)

4.4M

Total Visitors

Annual visitation in 2024

1.1M

Overnight Guests

24% of all Mesa trips

82%

Repeat Travelers

Strong visitor loyalty

\$1.2B

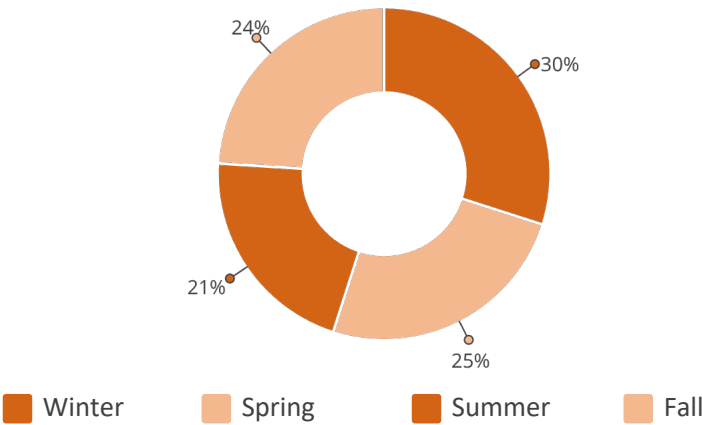
Economic Impact

Generated by visitors to Mesa

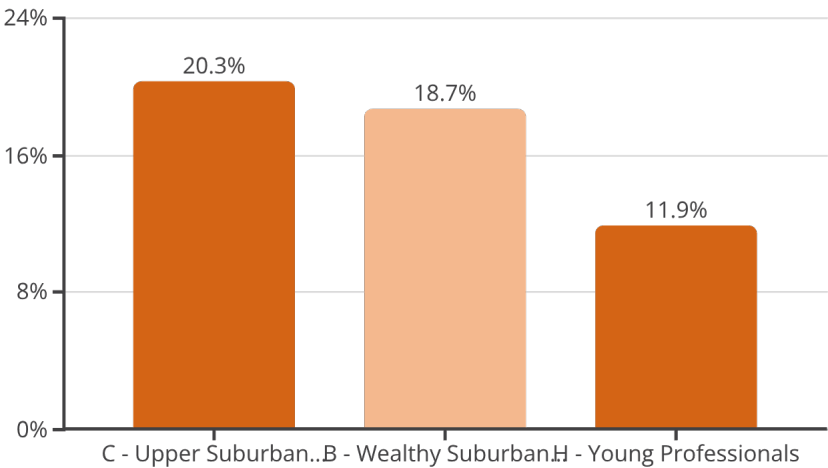
Top Feeder States

- 1 Arizona
- 2 California
- 3 Colorado
- 4 Illinois
- 5 Minnesota

Seasonality



Traveler Personas



What do visitors do in Mesa?

Entertainment: 70%

Shopping, live music venues, dining experiences, and performances drive the highest participation



Outdoor: 57%

Hiking, golf, cycling, and desert exploration attract active travelers year-round with 300+ days of sunshine



Cultural: 37%

Museums, historical sites, arts districts, and cultural attractions provide enriching experiences



Sporting: 27%

Spring Training baseball games and facilities like Arizona Athletic Grounds hosts youth and amateur tournaments.



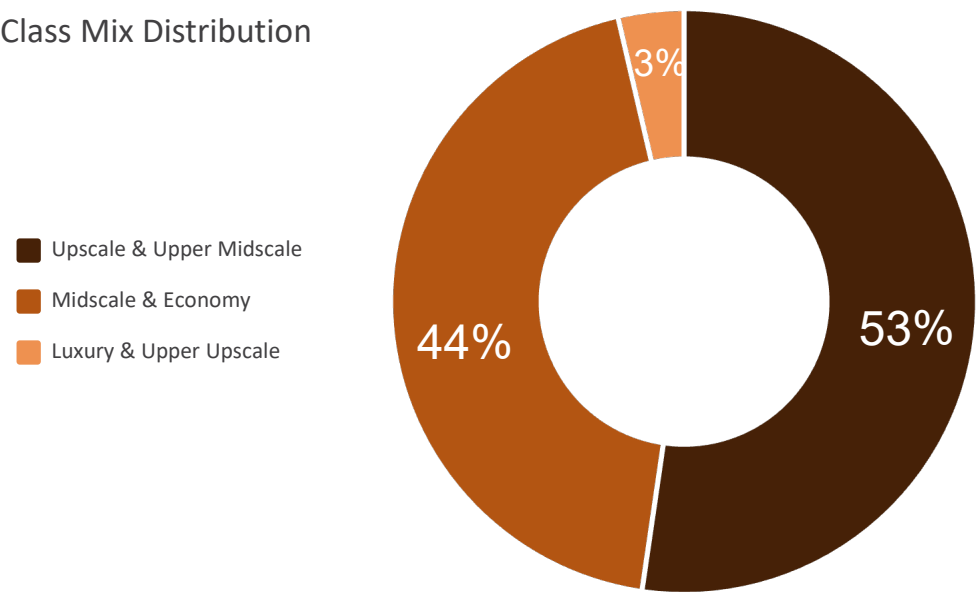
Mesa's Hotel Landscape

Current Inventory

64 5,434 \$120

Total Hotels Total Rooms Average Daily Rate

Class Mix Distribution



In Development

232 Rooms Delivered

2 new properties opened in the past 12 months, expanding Mesa's meeting and group capacity

570 Rooms Under Construction

Representing 10.4% of current inventory, this active construction demonstrates developer confidence in Mesa's growth

6 Projects in Development

Brands including StudioRes, Cambria, Tempo by Hilton, My Place, Homewood Suites, and Glo. These additions will help diversify Mesa's hotel mix

Major District Development Projects

Beyond individual hotels, Mesa is transforming entire districts with mixed-use projects that will reshape the visitor experience.

Medina Station



Southern Ave. & Signal Butte Rd.

Legacy Park



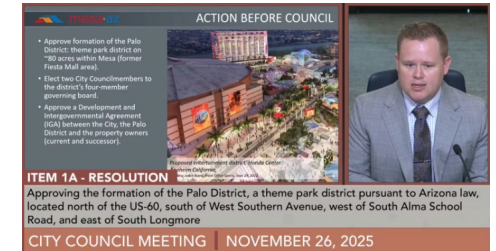
Ellsworth Rd. & Williams Field Rd.

Cannon Beach



Power Rd. & Warner Rd.

Palo District

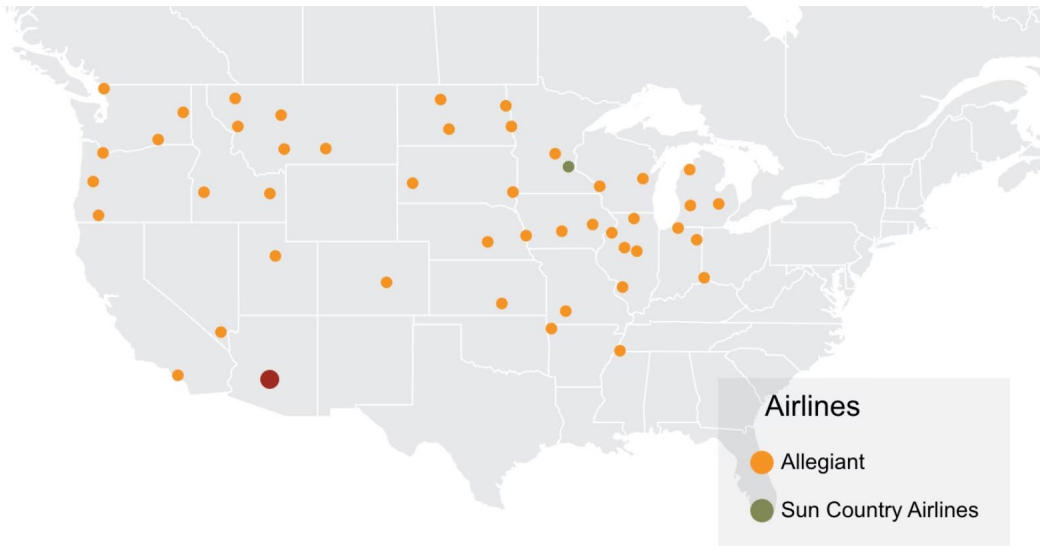


Fmr. Fiesta Mall (Southern Ave. & Alma School Rd.)

Mesa Gateway Airport (AZA)

- Flight activity up 36 percent, with **8 of the last 10 months** setting new year-over-year records

45 nonstop destinations, including recent additions: Portland, OR, Colorado Springs, CO, La Crosse, WI, Santa Ana, CA, Bloomington, IL



- Virgin Galactic's Delta-class spaceship manufacturing facility under construction
- Ongoing airfield and terminal modernizations improving capacity, efficiency and traveler experience



25/26 Marketing

2025 Recognition

Best Destination Social Media

Phoenix Magazine Travel Awards

Best Marketing Campaign

Banana Week

AZ Office of Tourism

Best Partnership

TEAM Arizona collaboration

AZ Office of Tourism



25/26 Marketing

2026 Focus Areas

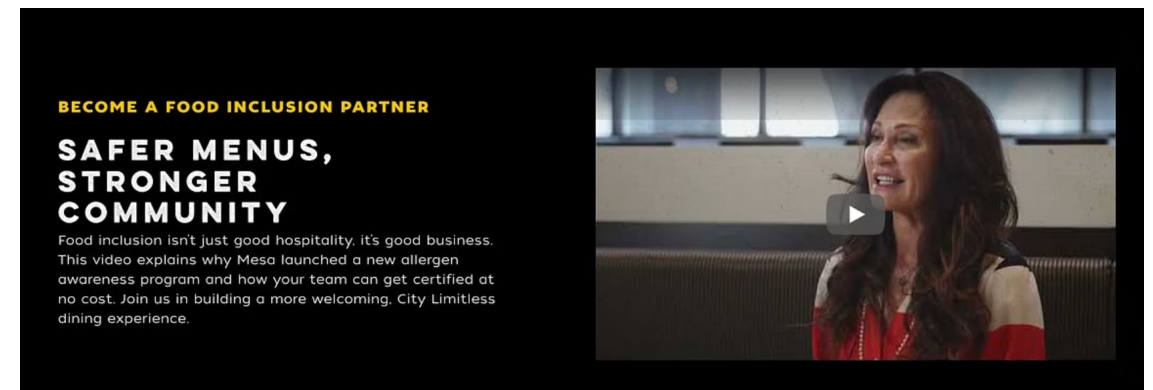
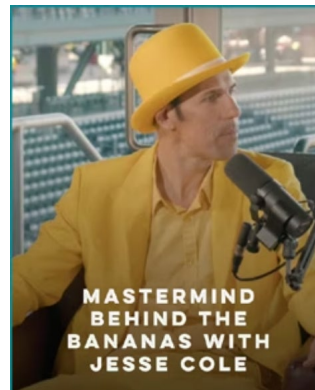
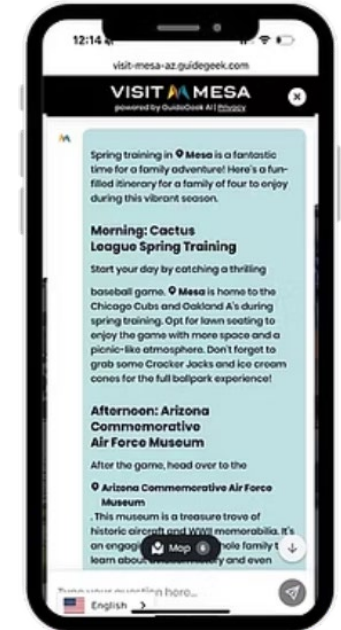
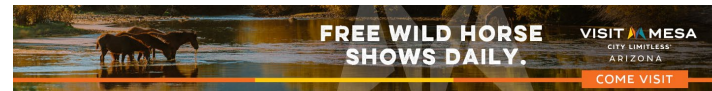
Local and event-driven marketing that boosts regional visitation

Allegiant route campaigns that grow awareness in new and emerging markets

AI and SEO modernization improving discoverability and conversion for all audiences

Expanding accessibility programs with an emphasis on food inclusion

Expand on City Limitless Podcast to extend reach and storytelling



25/26 Marketing

Allegiant Partnership

Posts	Engagements	Reach	EMV
54	17.7K	423.9K	\$465K



Ciera Hudson

33	15.4K	5.17%	297.4K	\$352.1K
Posts	Eng.	% Eng. Rate	Reach	EMV



Val Pope

12	989	1.3%	76.9K	\$45.6K
Posts	Eng.	% Eng. Rate	Reach	EMV



Jade Sharrer

9	1.3K	2.66%	50.7K	\$68.4K
Posts	Eng.	% Eng. Rate	Reach	EMV



Quick flight, big adventure! ✈️ We hopped from Provo to Mesa with @allegiant and had the b...

[Watch](#)



108 6 2



298 57 17.6K

Thank you!

Kate Yordi

Director, Marketing

Kate@visitmesa.com

@visitmesa



Visit Phoenix Update December 2025

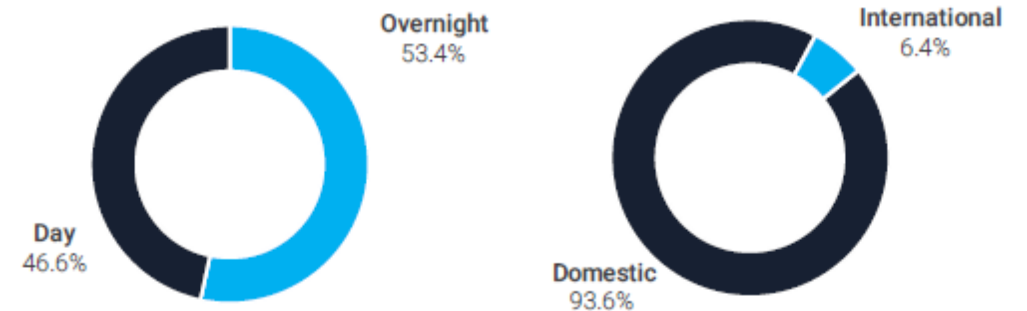
Eric Kerr
Vice President, Insights & Development



2024 City of Phoenix Visitation

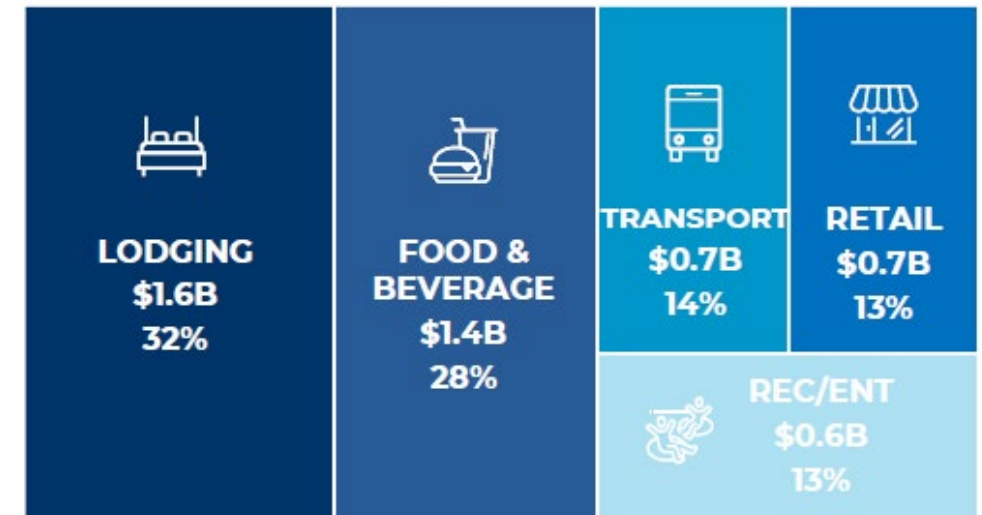
Visitation

- Record 20.8 million visitors
 - Increased 2.2% from 2023.
 - 19.5 million domestic visitors
 - 1.3 million international visitors
 - Int. visitation increased 11% from 2023



Spending

- Record \$5 billion direct spending
 - \$13.7 million spent per day by visitors
 - Total Spending increased 3.6% from 2023
- International visitors spent \$843.4 million
 - 16.8% of total visitor spending



Source: Tourism Economics

2024 City of Phoenix Visitation Economic Impacts

- 35,800 direct jobs and more than 56,600 total jobs supported
- Nearly \$3 billion in total wages supported
- \$703 million in total state & local taxes generated
 - Each household in Phoenix would need to be taxed an additional \$1,169 to replace the visitor-generated taxes received by state and local governments in 2024.

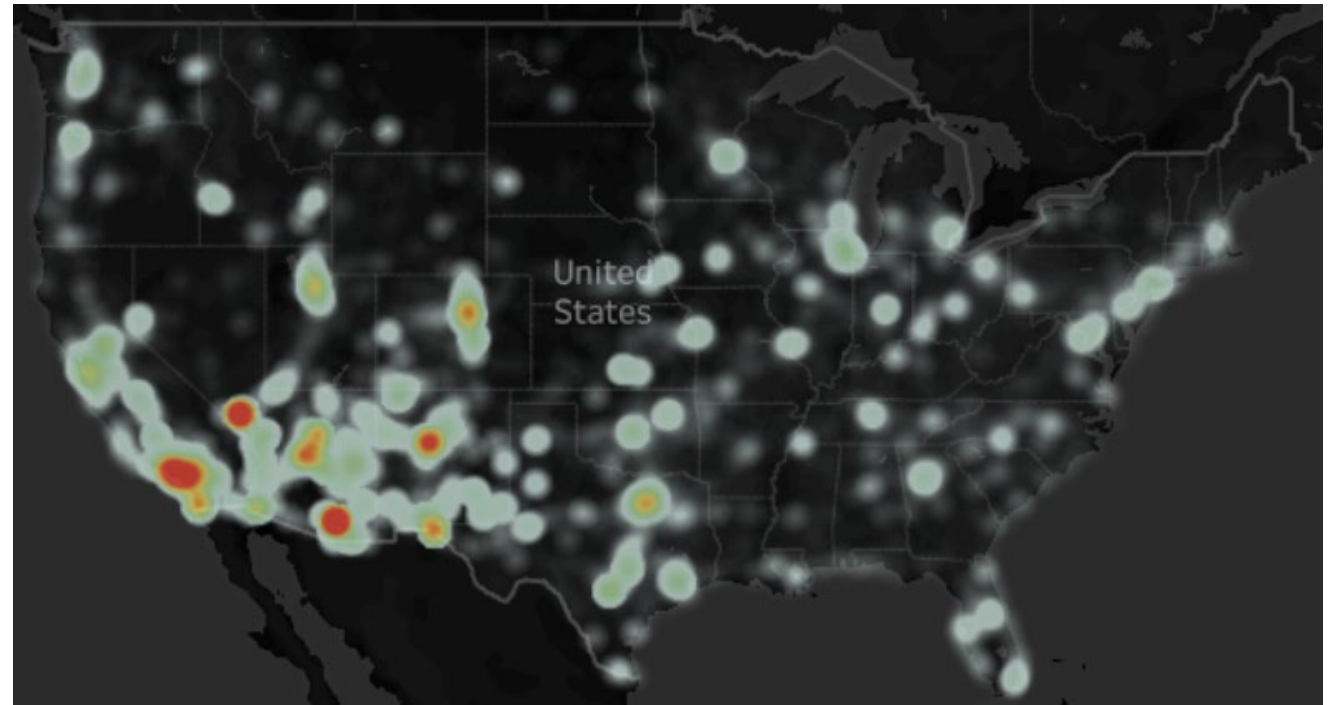
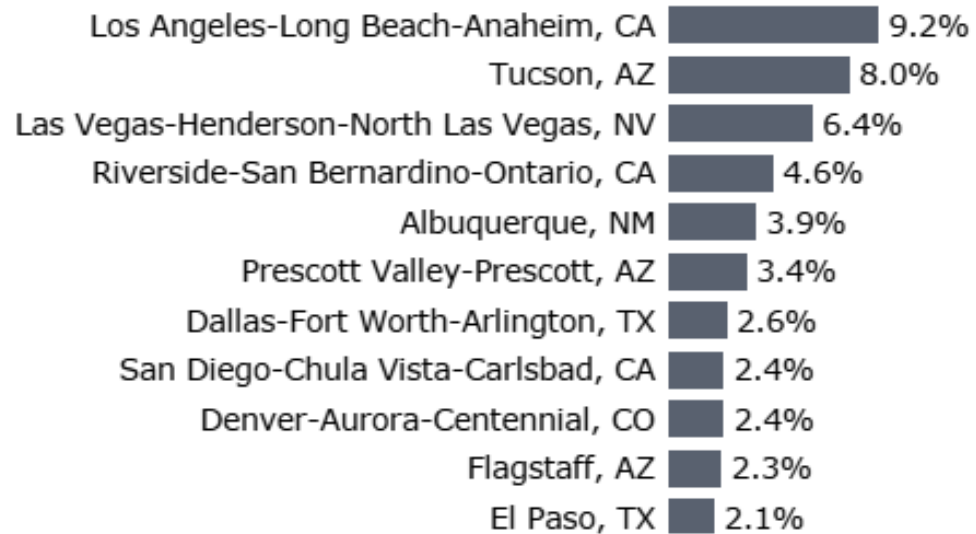


Domestic Overnight Visitors

Top 10 Origin Markets: Nov. '24 – Oct '25

Top Visitor Origin MSAs

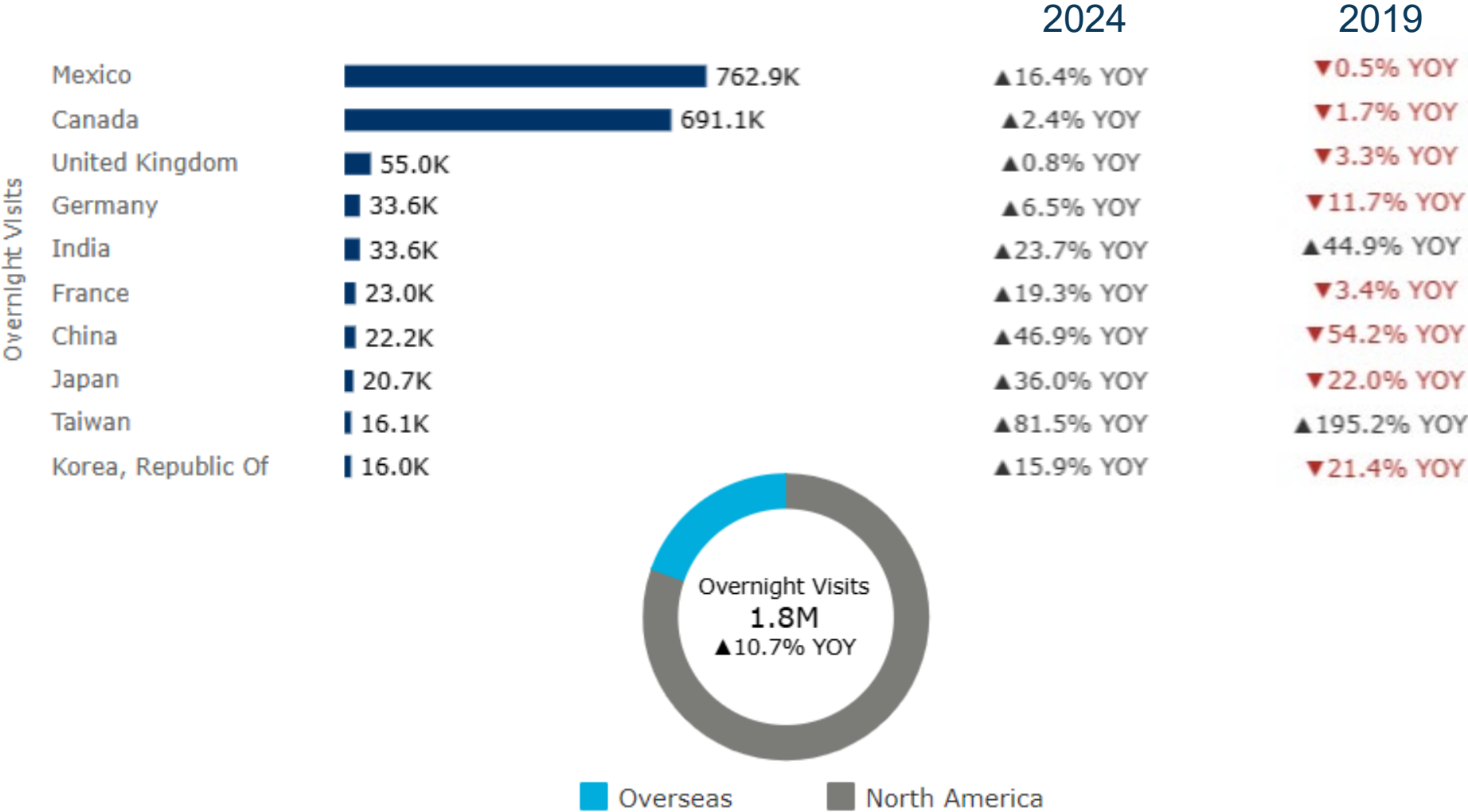
% share of total



Source: Azira geolocation data, Oct. 2025

2024 Top 10 International Markets for Phoenix

Year-over-year & 2019 Comparison

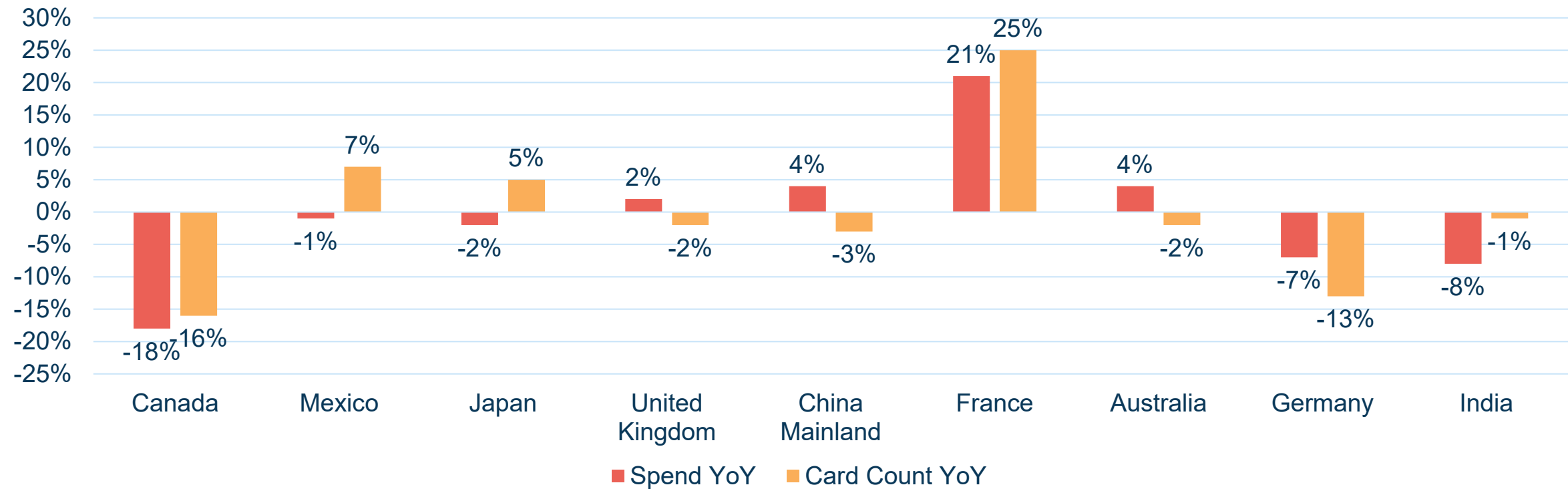


Visa Destination Insights

International Visa Credit Card Transactions in Phoenix-Metro

January – October 2025

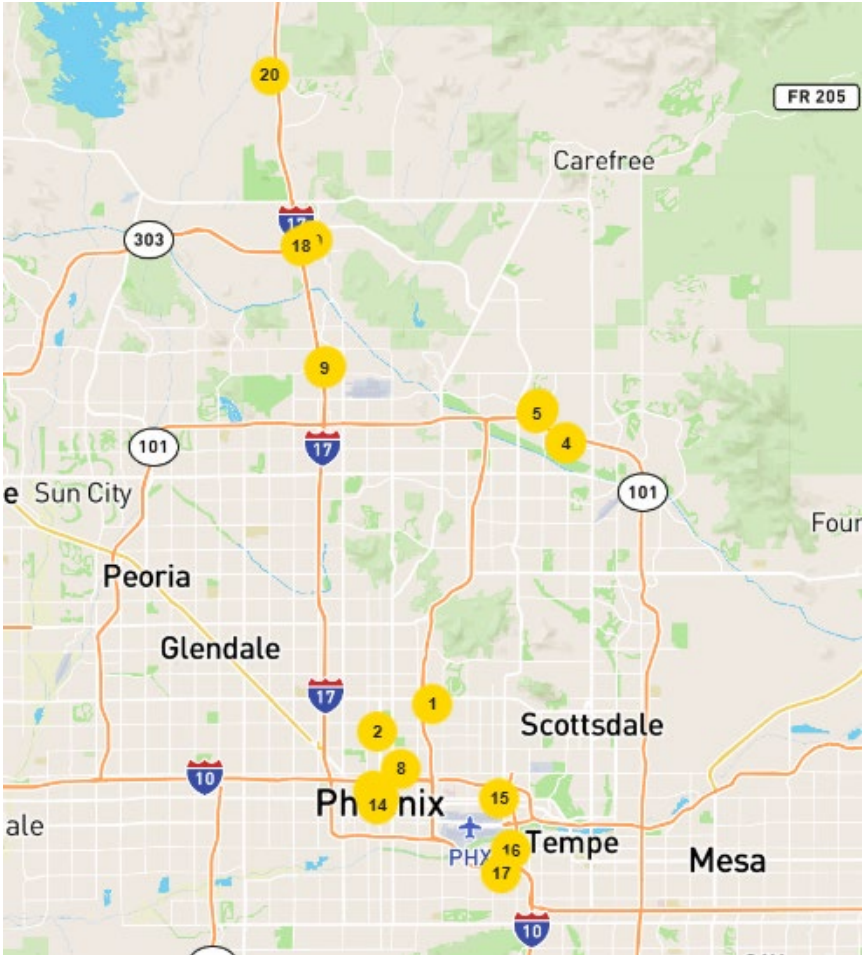
International Visa Credit Card Transactions: Phoenix-Metro
Year-to-date, Year-over-year percent change shown



Source: Visa Destination Insights, December 2025

City of Phoenix Hotel Pipeline

as of 12/9/2025



Status	Properties	Rooms
In Construction	5	685
Final Planning	9	1,272
Planning	6	2,417
Grand Total	20	4,374

Hotel Name	Opening	Rooms
Denū Hotel & Spa	Late 2026	236
Residence Inn by Marriott Phoenix SE	Late 2026	121
AC Hotel Phoenix Desert Ridge	Q1 2027	140
element Phoenix Desert Ridge	Q1 2027	100
Legacy Hotel and Ascend Hotel Collection	2035	88

Sky Harbor Updates

Sky Harbor Passenger Count

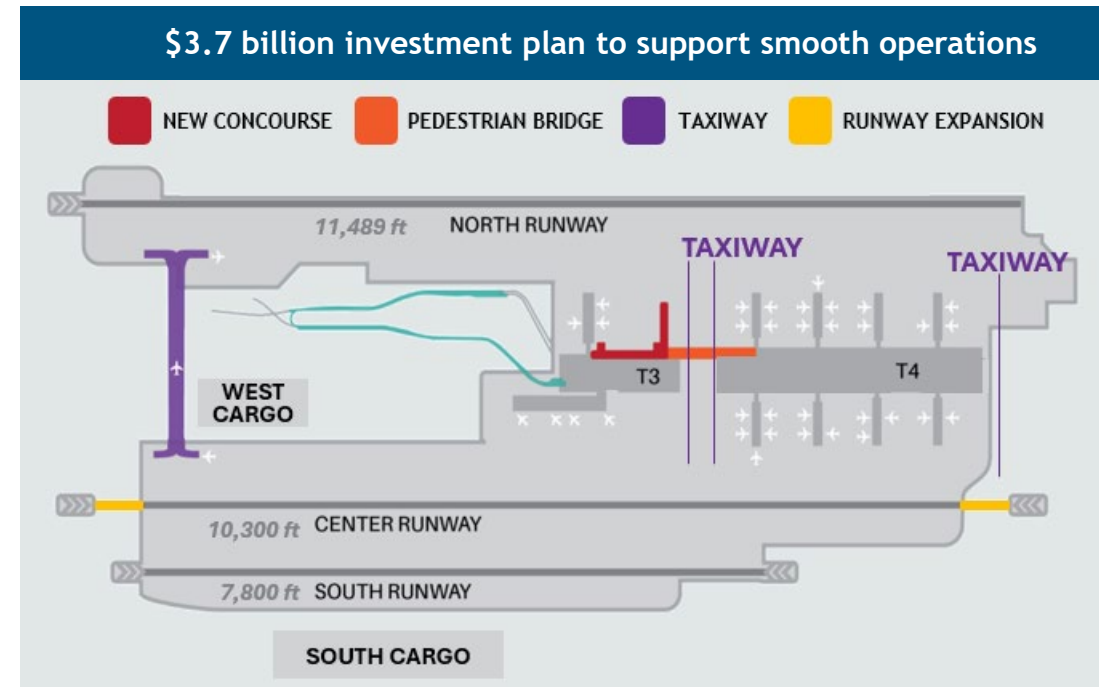
- Oct. 2025 YTD: 42.6M
 - Total passengers down -1.4%
 - Intl. passengers down -3.5%

Expanded Airlift

- **Aeromexico**, to Mexico City, daily service began March 2025
- **Air France** increased service May 2025
- **China Airlines & Starlux** service to **Taipei, Taiwan**
 - Service begins Dec. 2025 and Jan. 2026
- **Porter Airlines** (Canada)
 - Vancouver and Ottawa in 2026
- **Domestic growth**: Little Rock, Detroit, Baltimore, Atlanta, Orlando, Austin, Seattle, Pittsburgh, San Diego, Anchorage

Airport Improvements

- Terminal 3 N2 Concourse
 - Six gate concourse with connectors to T3 & T4
- West Taxiway U & Central Runway extension
- West Terminal
 - Pre-design phase



Source: Sky Harbor, Phoenix Business Journal, OAG

Major Hotel Developments

- **Vai Resort (late 2026)**
 - opening in two phases at the end of 2026 (estimate)
 - 1,100 rooms across multiple towers; 11 restaurants
 - 11,000-seat amphitheater; 2,000-capacity theater (new)
 - 150,000 sq ft of meeting space
- **Denū Hotel & Spa(Q3 2026)**
 - First luxury hotel in downtown Phoenix
 - First spa in downtown Phoenix
- **Hilton Tapestry Collection & Homewood Suites by Hilton, Mayo Clinic (Q2 2028)**
 - Dual-brand hotel
 - 254 total rooms
- **Astra Phoenix (Q4 2028)**
 - Mixed-use tower will be the tallest building in Arizona when completed.
 - Hotel portion includes 250 rooms



Major Attraction Developments

- Mattel Adventure Park – delayed to Vai opening
- Dark Sky Discovery Center – mid-2026
- Cosm Dorrance DOME – now open
 - Arizona Science Center
- Alden, Phoenix Art Museum new restaurant
 - opened Oct. 2025
- ASU Health's downtown HQ – 2028
 - John Shufeldt School of Medicine and Medical Engineering
- Orpheum Theatre renovation



Cosm at Arizona Science Center



Dark Sky Discovery Center

Major Event Announcements

- **NASCAR 2025 National Championship**
 - Championship moves to Miami in 2026
 - Phoenix raceway will host playoff race Oct. 2026
- **Rate Bowl**
 - December 26, 2025, 2:30 PM MST
 - Minnesota Golden Gophers vs. the New Mexico Lobos
- **Vrbo Fiesta Bowl**
 - 2025 CFP Semifinal
 - January 8, 2026
- **2026 NCAA Women's Final Four**
 - April 3-5, 2026
- **Xfinity U.S. Gymnastics Championships**
 - August 6-9, 2026
- **2027 NBA All-Star Game**
 - February 19-21, 2027



Major Conventions

- **Semicon West**
 - October: 2025 – Record attendance
 - Returning: 2027, 2029
- **Intervarsity Christian Fellowship**
 - Dec. 28, 2025 – Jan. 1, 2026, est. 7,500 attendees
- **American Assoc. for the Advancement of Science**
 - Feb. 13-14, 2026, est. 10,000+ attendees
- **USA Volleyball**
 - July 4-11, 2026, est. 14,000 attendees
- **Mary Kay, Inc.**
 - Jan 18-21, 2027, est. 9,500 attendees
- **National Speech & Debate Association**
 - June 12-18, 2027, Est. 11,000 attendees
- **Episcopal Church**
 - June 29 – July 9, 2027, est. 8,000 attendees





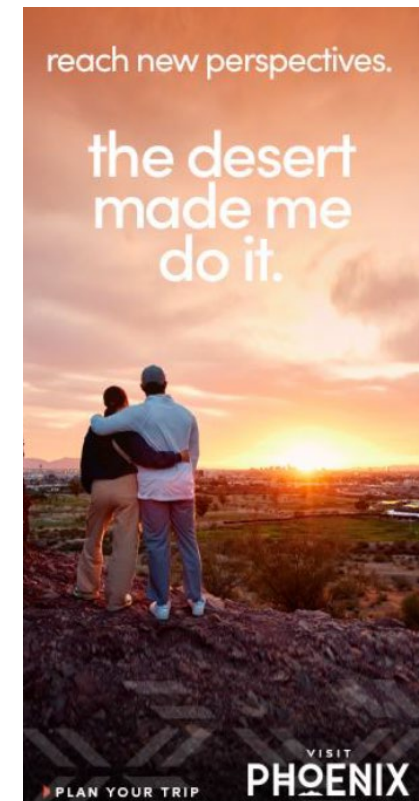
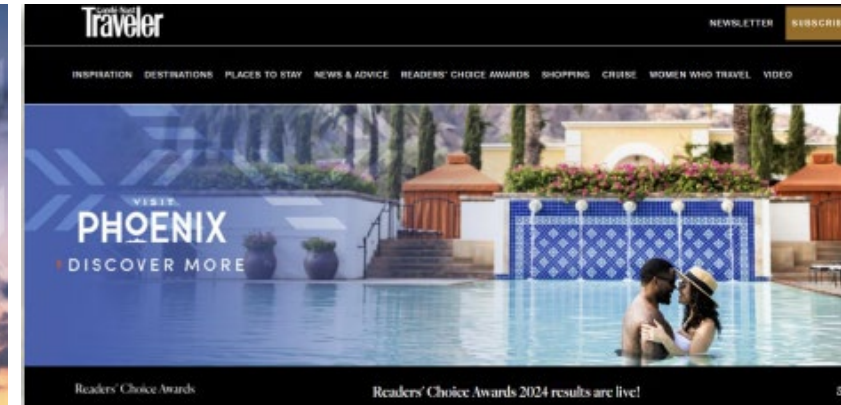
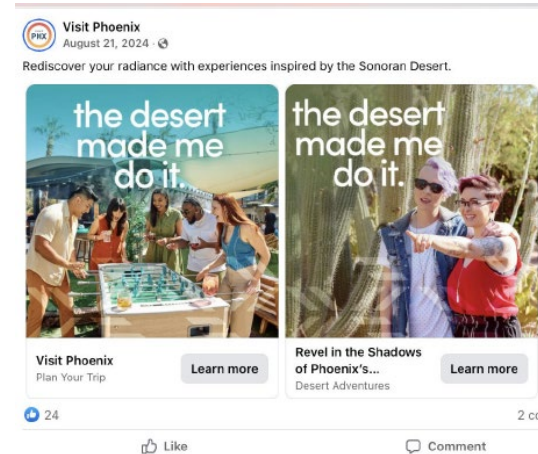
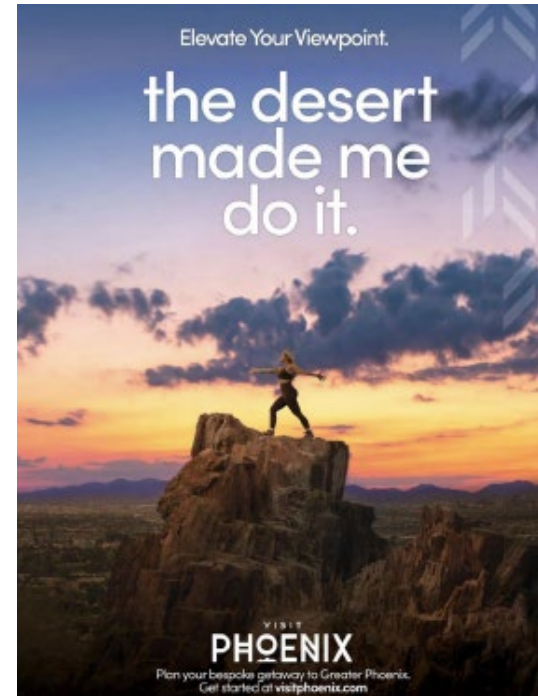
- Approved by Phoenix City Council June 2024
- Functions as department within Visit Phoenix
- Established advisory committee with local representation from arts, sports, events and entertainment sectors.
- **Received 60+ leads to-date representing:**
 - 171,000 hotel room nights
 - 172,000 event attendees
 - \$253 million est. direct spending
- Collegiate Boxing, World Baseball/Softball Confederation, USA Judo, Volleyball Associations, USA BMX, Powerlifting, Savannah Bananas, USA Track & Field and more.



FY 25 Marketing

- 139M total leisure impressions
 - 51.8M measurable impressions
 - 1.1 million observed visits
 - 77 days – average exposure to visit
- Travel Trade: Agent Targeted Ads
 - 20,000 + bookings in market
 - 65,000+ rooms nights generated
 - \$18.4 million revenue generated.

Campaign Examples



FY 26 Leisure Marketing

Two new agencies for FY25/26

- Giant Noise
 - New leisure creative agency
- Digital Edge
 - New M+C strategic agency

FY25/26 Plan

- Large focus on culinary
- Expanded partnerships with community organizations including GPEC, Chamber, etc.
- Expanding international marketing
 - Focus on airlift markets.

Primary Geos	Secondary Geos	Summer Support
Chicago	Boston	Arizona (omit Phoenix)
Dallas	Portland	Southern CA
Denver	Minneapolis	San Francisco
Los Angeles	Salt Lake City	Colorado
Southern California	Washington DC	Nevada
Arizona (omit PHX)	San Francisco	New Mexico
Seattle		Texas
Albuquerque		
NYC		
Las Vegas		

Canada	Mexico	UK/EU	Asia
Calgary	Guadalajara	le-de-France	Taiwan
Ontario (Toronto focus)	Mexico City	London	
Vancouver	Monterey		



Phoenix-Metro Visitor Performance

October 2025 YTD



Room Nights Sold

Hotels/Resorts: -1.7%
Vacation Rentals: -1.9%



Visitor Credit Card

Spending:

(Sept. YTD)
Domestic: +3.0%
International: -9%



Sky Harbor:

Total Passengers: -1.4%
International: -3.5%



International Visa Arrivals

(Sky Harbor)

-0.3%
Mexico Air: +1.9%



Canadian Visitation

(Visa Credit Cards)

Card Counts: -16%
Spending: -18%



Questions?

Eric Kerr:

ekerr@visitphoenix.com

602-452-6238

VISIT
PHOENIX

