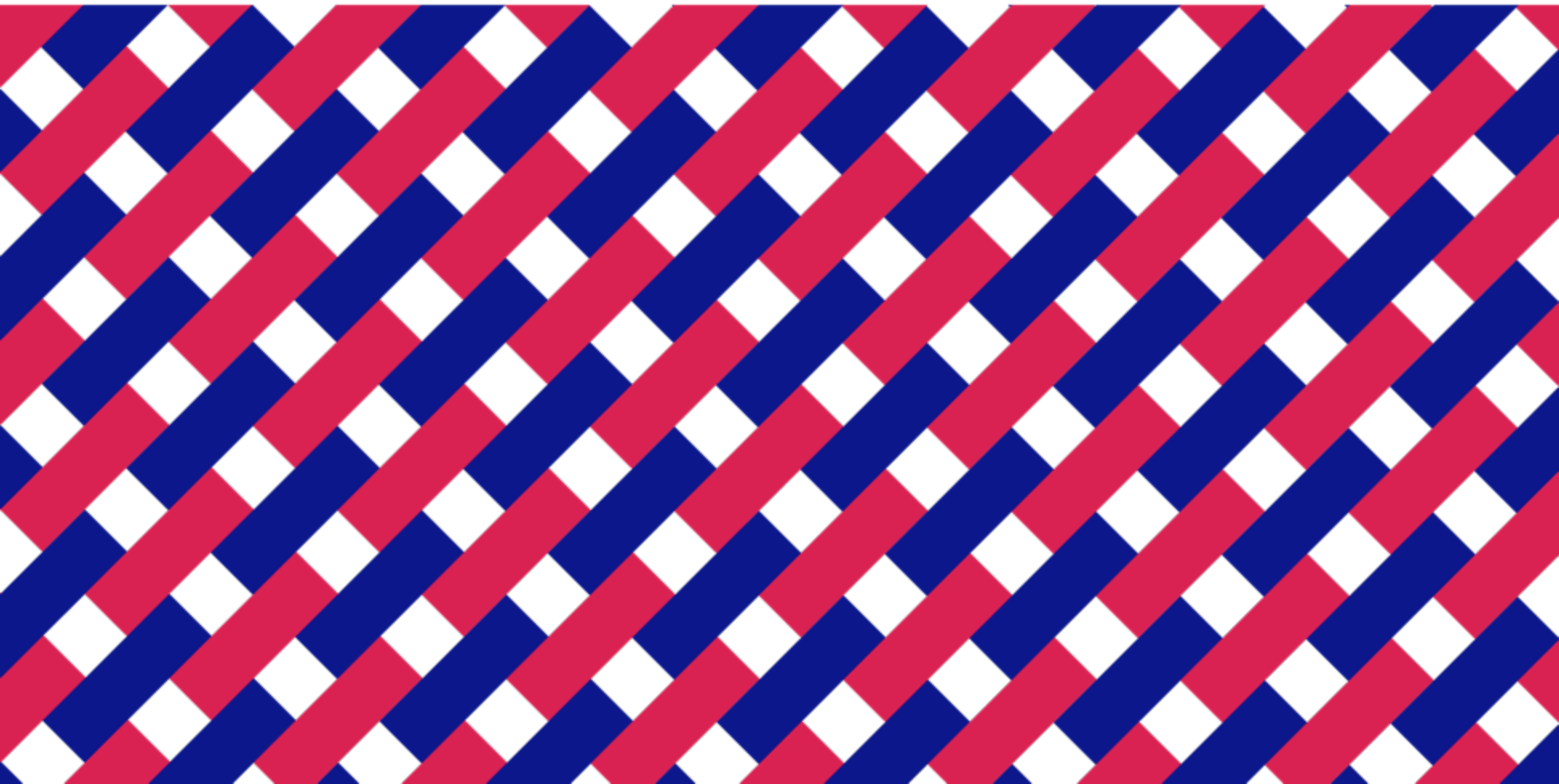


September 2015

# Destination Event Market Analysis + Fundraising Feasibility Study: Market Analysis

City of Scottsdale



# Webb Management Services

- \* Webb Management Services, Inc. is North America's leading provider of arts and cultural project planning services
- \* We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, strategic planning, and cultural planning
- \* Our practice was founded in 1997, and we just started our 348<sup>th</sup> assignment
- \* Previous work in the region includes projects in Chandler and Mesa, as well as a Cultural Facilities Master Plan for the Scottsdale Cultural Council



## Additional team members

### Elizabeth Healy, Healy Entertainment

Elizabeth recently re-launched Healy Entertainment, a development and production company. One of her first clients is The Recording Academy (GRAMMY Awards Organization), which follows on the heels of her eight-year term as senior executive director of The Recording Academy New York Chapter. Her work there included developing and producing over 400 special programs and events for the company. Elizabeth's past experience also includes working at significant performing arts organizations such as Lincoln Center for the Performing Arts, New York City Ballet, Saratoga Performing Arts Center, and Finger Lakes Performing Arts Center, in addition to several major record companies, and with world renowned artists.

### Christine Ewing, Ewing Consulting

Christine has a proven track record of more than 25 years producing successful financial development programs for a broad range of vital nonprofit institutions. As the founder of Ewing Consulting, now in its 10<sup>th</sup> year, she routinely produces outstanding results in all areas of capital and endowment development.



## Study brief + background

- \* Webb Management Services has been hired to conduct a market analysis and fundraising feasibility study for a destination event in downtown Scottsdale
- \* The goal is to identify an event that will:
  - \* Activate downtown Scottsdale with increased foot traffic and activities;
  - \* Raise Scottsdale's international profile and reputation as a destination;
  - \* Expand tourism into the shoulder season; and
  - \* Reinvigorate the City's positioning within the overall tourism industry
- \* The impetus for this study comes from the Scottsdale Hospitality + Tourism Five Year Strategic Plan completed in 2012



## Approach and methodology

- \* To complete this brief, our research assesses the following:
  - \* The local and regional market
  - \* The local and regional supply of festivals, events + facilities
  - \* Potential community and national partners
  - \* Community impacts and benefits
- \* Additionally, we interviewed key internal and external constituents; toured the City and various facilities; collected data from the City, Tourism Advisory Task Force, and the community; and looked for models and precedents elsewhere



## Study informants

- \* Aaron Studebaker, Salt River Pima-Maricopa Indian Community/Talking Stick Cultural + Entertainment Destination Area
- \* Amy Corben, EMP Management
- \* Amy Ettinger, Scottsdale Film Festival
- \* Audrey Thacker, Artisan Markets
- \* Ben Moriarity, City of Scottsdale
- \* Beth Lauterbach, Scottsdale Fine Art
- \* Bob Pejman, Pejman Gallery
- \* Carolyn Stoeckel, Scottsdale Convention + Visitors Bureau
- \* Cheryl Sumners, City of Scottsdale
- \* Cindy Ornstein, Mesa Arts Center
- \* Cory Baker, Scottsdale Cultural Council
- \* Danielle Casey, City of Scottsdale
- \* David Alford, Parada del Sol
- \* Dr. David Peterson, Scottsdale Unified School District
- \* David Scholefield, Fairmont Scottsdale Princess
- \* Diana Smith, Scottsdale Cultural Council
- \* David Tyda, Affordable Food Festivals
- \* Doug Huls, Sun Circuit + Arizona Fall Championship Show
- \* Ellen Andres-Schneider, Exposures to Excellence
- \* Erin Perreault, City of Scottsdale
- \* Fred Unger, Spring Creek Development
- \* French Thompson, French Designer Jewelry
- \* Fritz Behring, City of Scottsdale
- \* Guy Phillips, City of Scottsdale



# Study informants

- \* James Moser, Scottsdale Culinary Fest
- \* Dr. Jan Gehler, Scottsdale Community College
- \* Jane Phillips, Scottsdale Fine Art
- \* Janice McCrea Wight
- \* Jason Rose, Rose Law
- \* Jim Lane, City of Scottsdale
- \* Jinger Richardson, Scottsdale Gallery Association
- \* Joan Griffith, Trails Head Galleries
- \* Joe Iturri, W Hotels
- \* John Holdsworth, TLX Inc.
- \* Joseph Pittel, May Gallery
- \* Judi Combs, Waterfront Fine Art + Wine Festival
- \* Karen Churchard, Arizona Office of Tourism
- \* Karen Farugia, Musical Instrument Museum
- \* Kathleen Wade, City of Scottsdale
- \* Kelly Corsette, City of Scottsdale
- \* Kelly Triplett, Scottsdale Convention + Visitors Bureau
- \* Ken Goldfine, Zenith Management Company
- \* Ken Koziol, Entertainment Solutions, Inc.
- \* Kira Peters, City of Scottsdale
- \* Kroy Ekblaw, City of Scottsdale
- \* Larry Edmonds, Scottsdale Center for Performing Arts
- \* Linda Milhaven, City of Scottsdale
- \* Margaret Leichtfuss, Scottsdale Leadership
- \* Mark Pabst, The Signature Gallery
- \* Mark Reynolds, Hashknife Pony Express
- \* Megan Doyle, Scottsdale Convention + Visitors Bureau



## Study informants

- \* Michael Fox, Museum of the West
- \* Mike Phillips, City of Scottsdale
- \* Mike Surguine, Sanctuary on Camelback Mountain Resort
- \* Peter Arceo, Casino Arizona + Talking Stick Resort
- \* Phillip Sacks, DeRubeis Fine Art of Metal Scottsdale LLC
- \* Rachel Pearson, Scottsdale Convention + Visitors Bureau
- \* Rachel Sacco, Scottsdale Convention + Visitors Bureau
- \* Robb McCreary, Talking Stick Resort
- \* Robert Booker, Arizona Commission on the Arts
- \* Ron Baily, May Gallery
- \* Sherry Henry, Arizona Department of Tourism
- \* Steve LeVine, Steve LeVine Entertainment
- \* Tom Giller, Alamos Management Resources
- \* Trey Brennen, T.H. Brennen Fine Art
- \* Virginia Korte, City of Scottsdale
- \* Walter Morlock, R Entertainment
- \* Wayne Ecton, City of Scottsdale





# Forces + Trends



## Forces + trends in festivals/events

- \* Fans expect more choices and personalized experiences, resulting in increased exclusive and unique VIP opportunities (seats in private lounge areas, access to viewing platforms, time backstage, etc.) at higher price points
- \* Hybrid festivals (festivals that include elements of art, music, food, fashion, and so on) attract bigger audiences and bring in more revenue
- \* Millennials are looking for event experiences and the “feeling of community and oneness that large gatherings can generate”
- \* Metrics gathered from online ticket sales are helping event planners make decisions about when to staff up, informing expectations on attendance flow, and helping avoid planning and logistic shortfalls
- \* Mobile technology is dramatically improving the overall attendance experience, allowing for faster lines, eliminating fraudulent behavior, and keeping real-time data entry records
- \* Wearable technology (things like smart cards and wristbands with Radio Frequency Identification) is trending, creating opportunities for ticketless entrée and cashless in-festival purchases
- \* The cash value of social media is increasing—in 2013, Twitter drove nearly 28 event page views (almost two times the number of views as Facebook) and generated \$2.18 per tweeted share

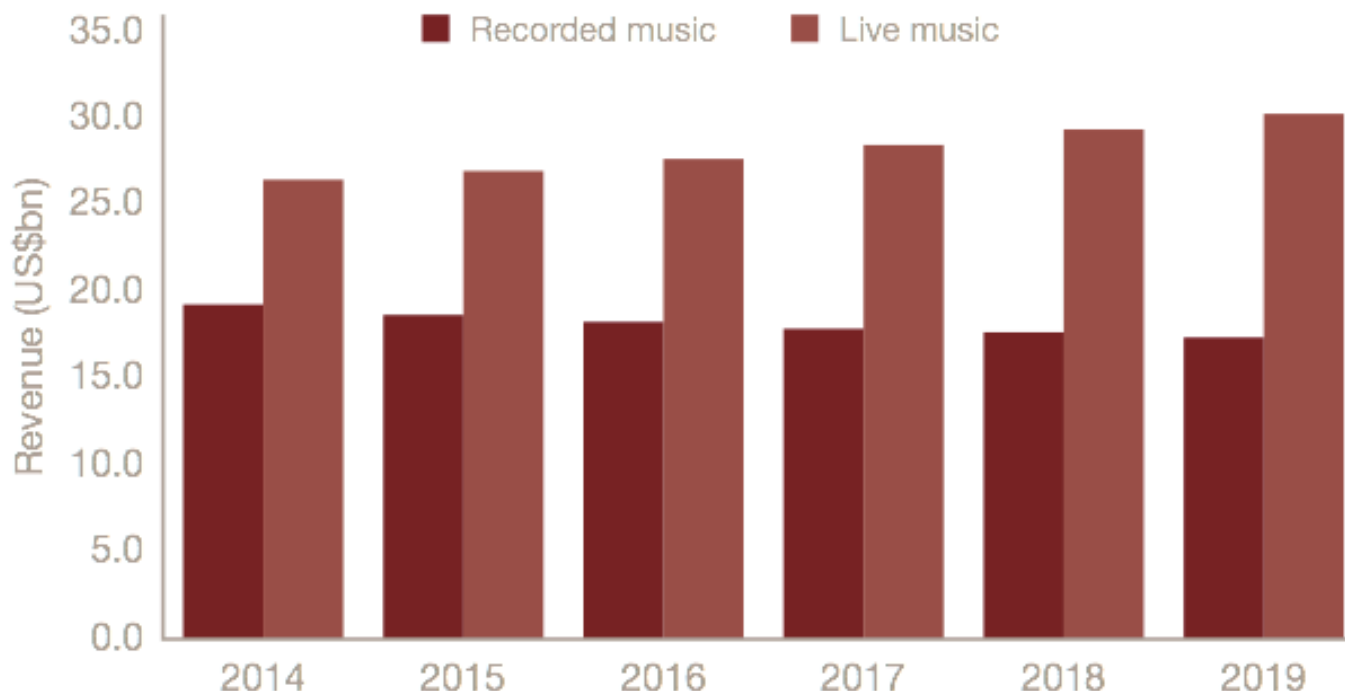
Sources: *Eventbrite: 6 New Trends Impacting Festivals + Consumer Events (2013)*; *Univision Communications Trend Lab, “International Transcendence of Music Festivals” (2014)*



# Forces + trends in festivals/events

**Fig. 1: Annual growth in global live music revenue will contrast with declines in recorded music**

Global live and recorded music revenue (US\$bn), 2014–2019



Source: Global entertainment and media outlook 2015–2019, PwC, Ovum

## Forces + trends in festivals/events

Consumers value – and are willing to pay a premium for – real-life physical entertainment experiences.



Live music dominates

70%

of total music sales

Live music dominates, accounting for 70% of total music revenue in 2019 and growing by 4.1% CAGR



Source: *PwC Global entertainment and media outlook: 2015-2019*. This image is captured from a larger infographic, titled “The Future of the Music Industry”, that projects changes in the music industry through 2019. Live music revenue in this context refers specifically to ticket sales.



## Forces + trends in festivals/events: conclusions

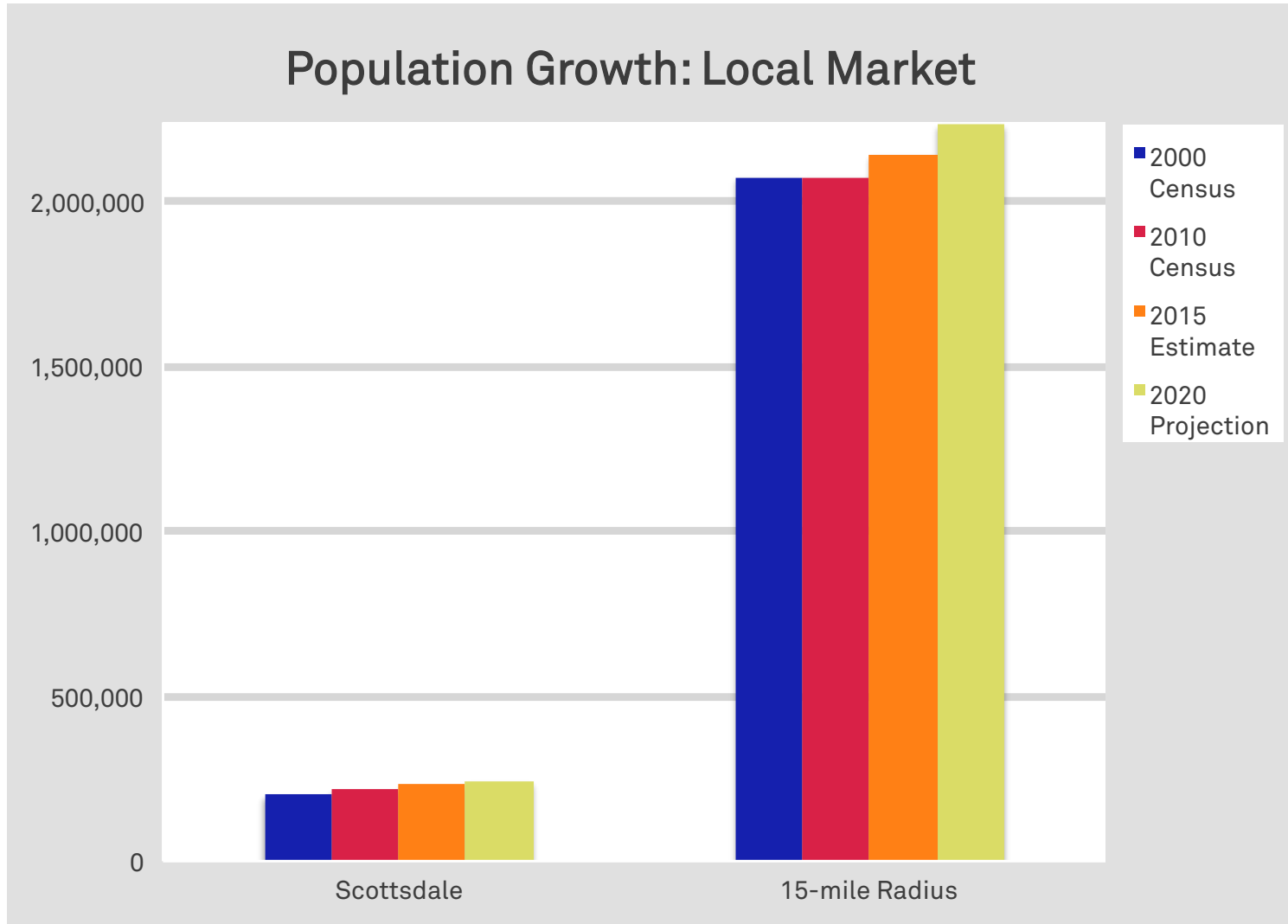
- \* A destination event in Scottsdale will need to include multiple VIP opportunities, particularly those that allow attendees to feel like the experience was created specifically for them
- \* Diversity is key to attracting a large and diverse audience—the event needs to have a hook and then needs to build off of that hook to create a little bit of something for everybody
- \* There is value in technology; a destination event in Scottsdale will need be at the cutting edge of trends in wearable and mobile tech, as well as ticketing
- \* Consumers attend festivals and events because they are looking for an experience; that experience needs to begin the minute the attendee steps out of the airport, their hotel, or their apartment



# Market Characteristics



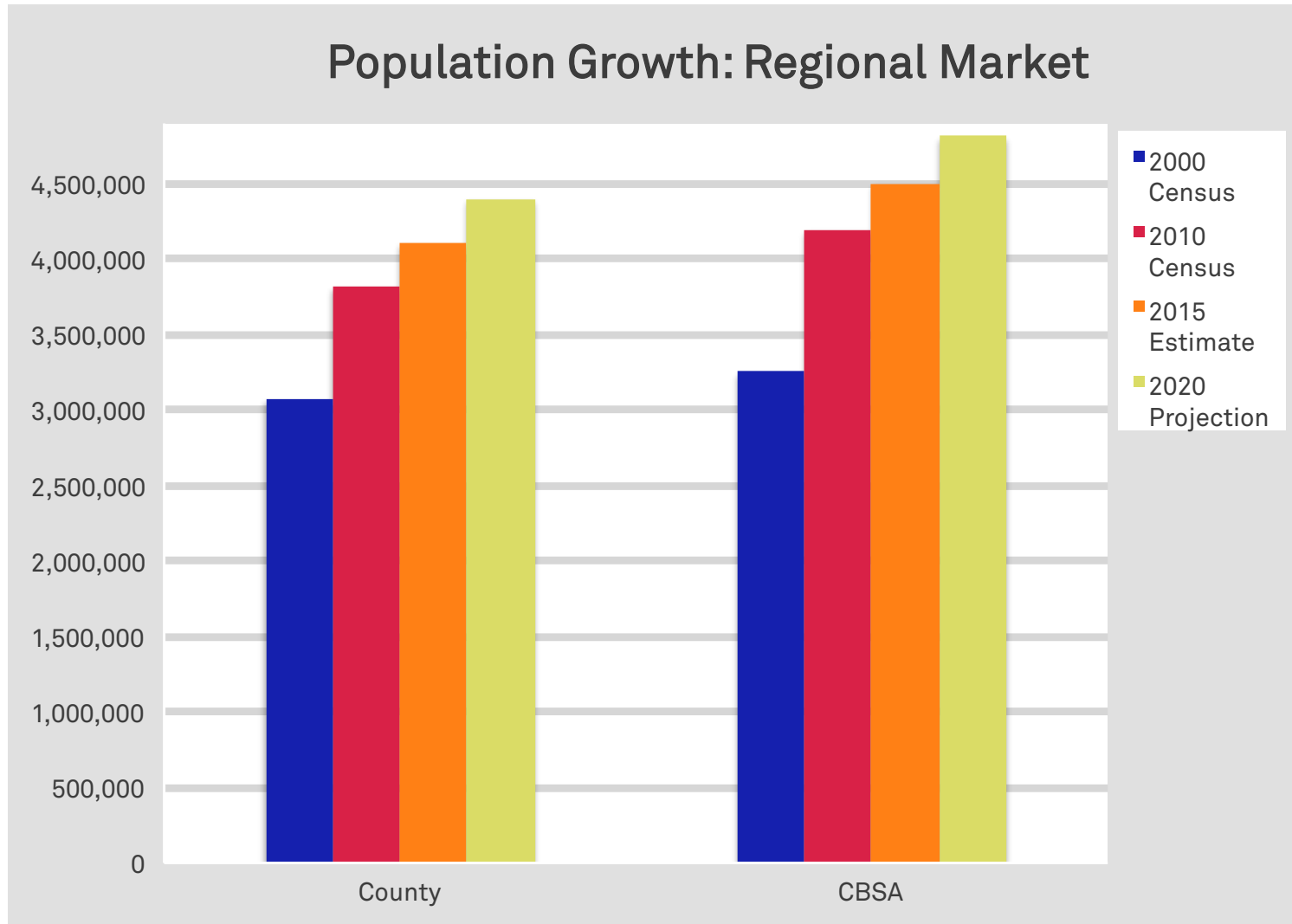
# Market characteristics\*



\*A full market analysis can be found in the appendix.

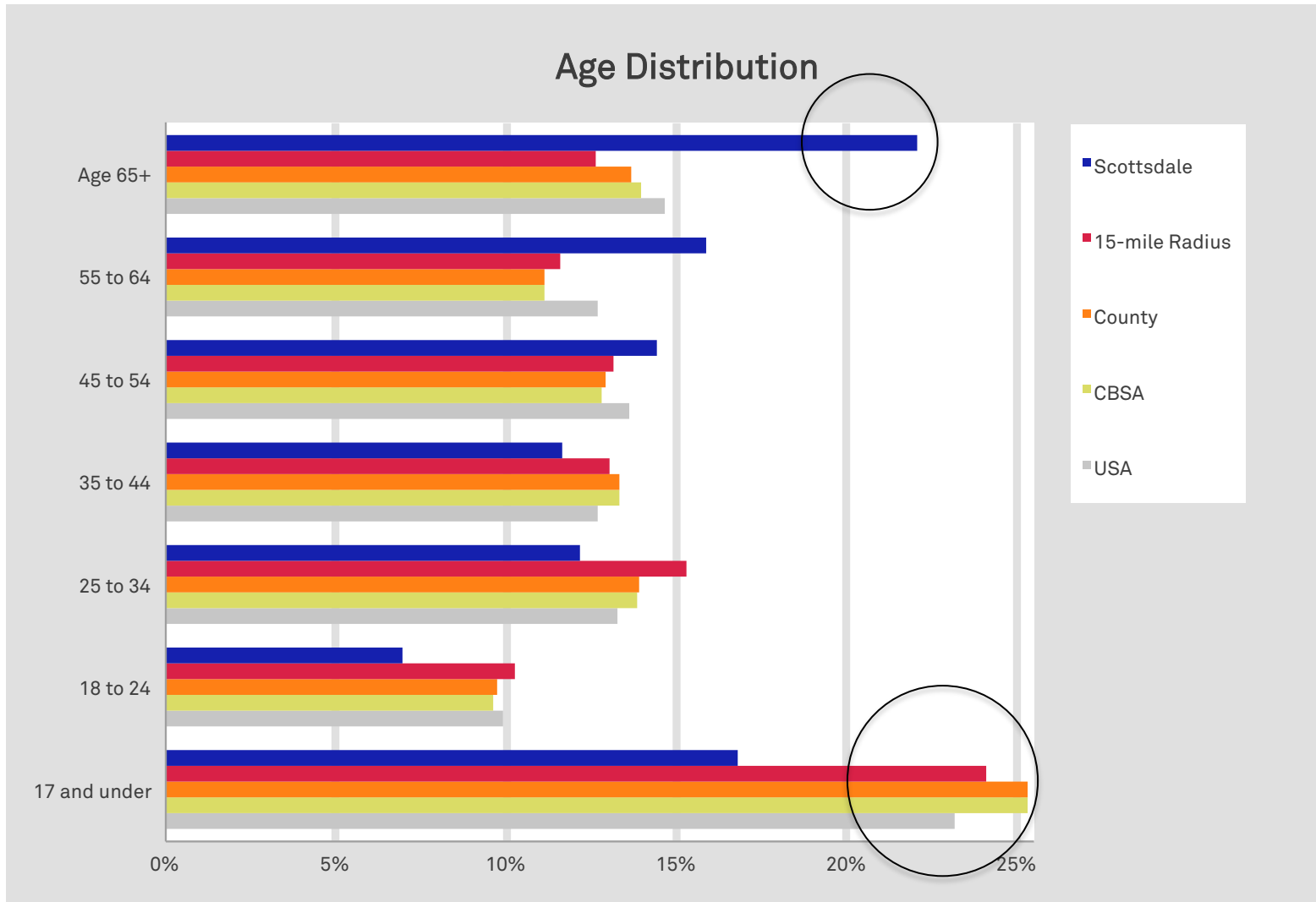


# Market characteristics

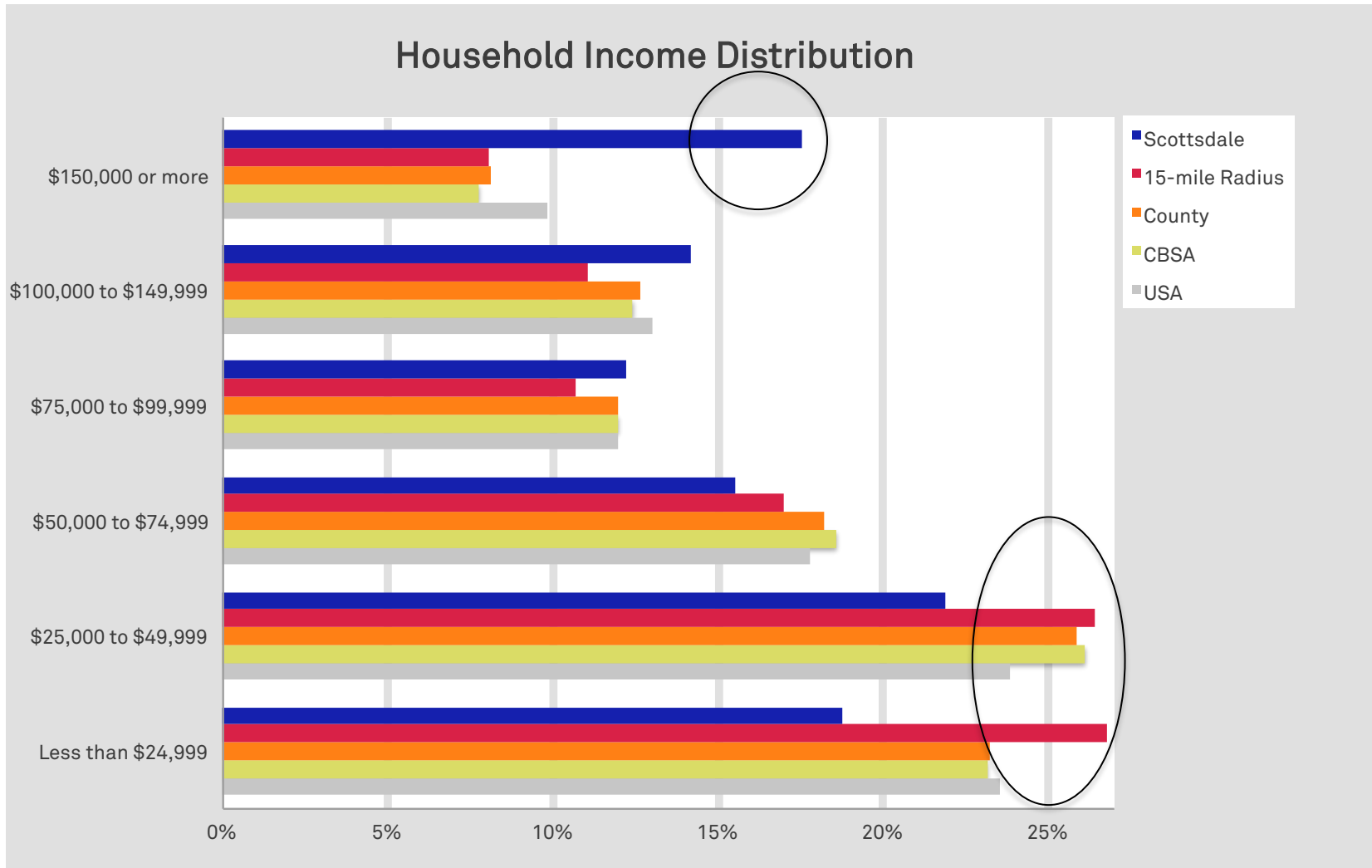




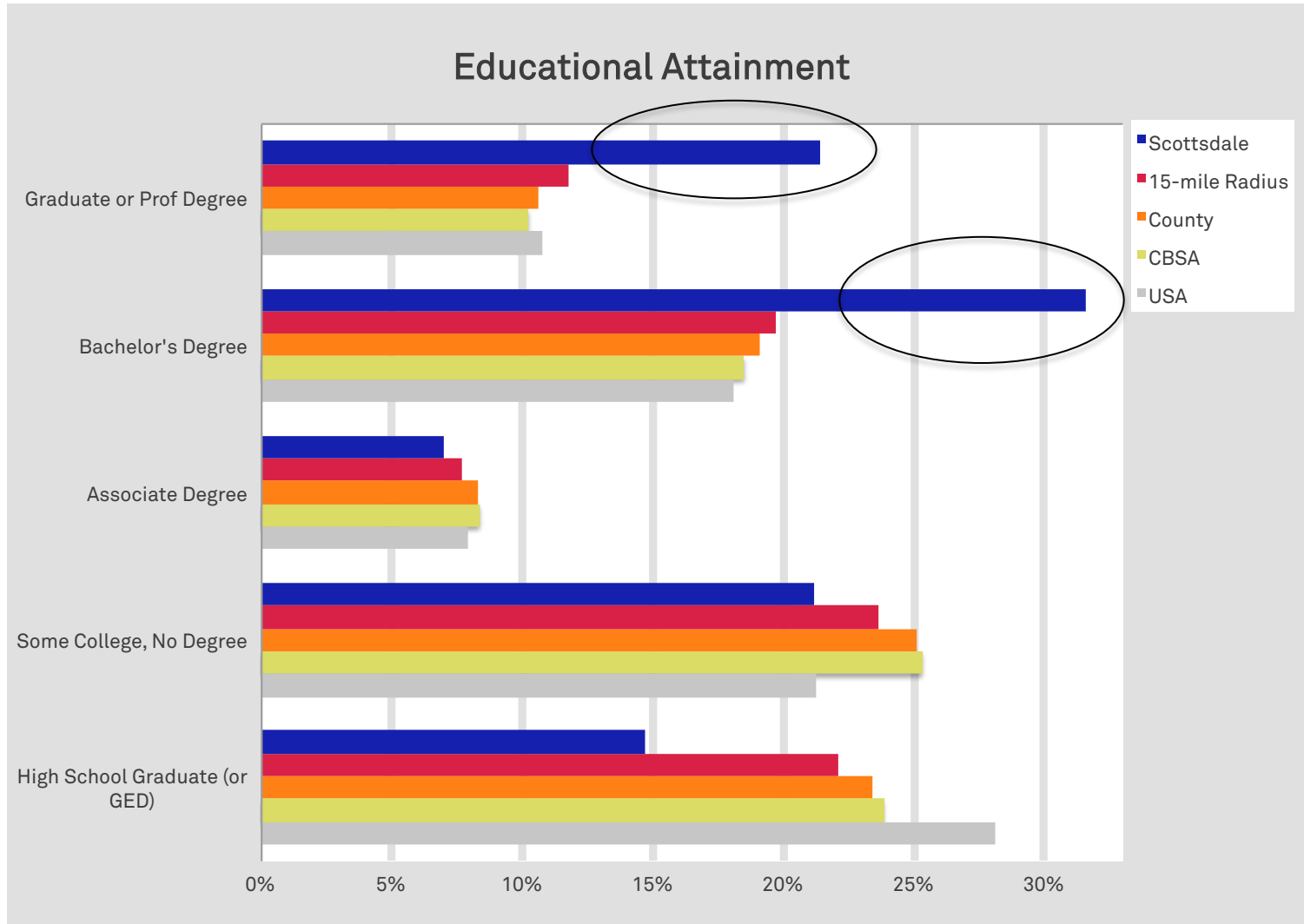
# Market characteristics



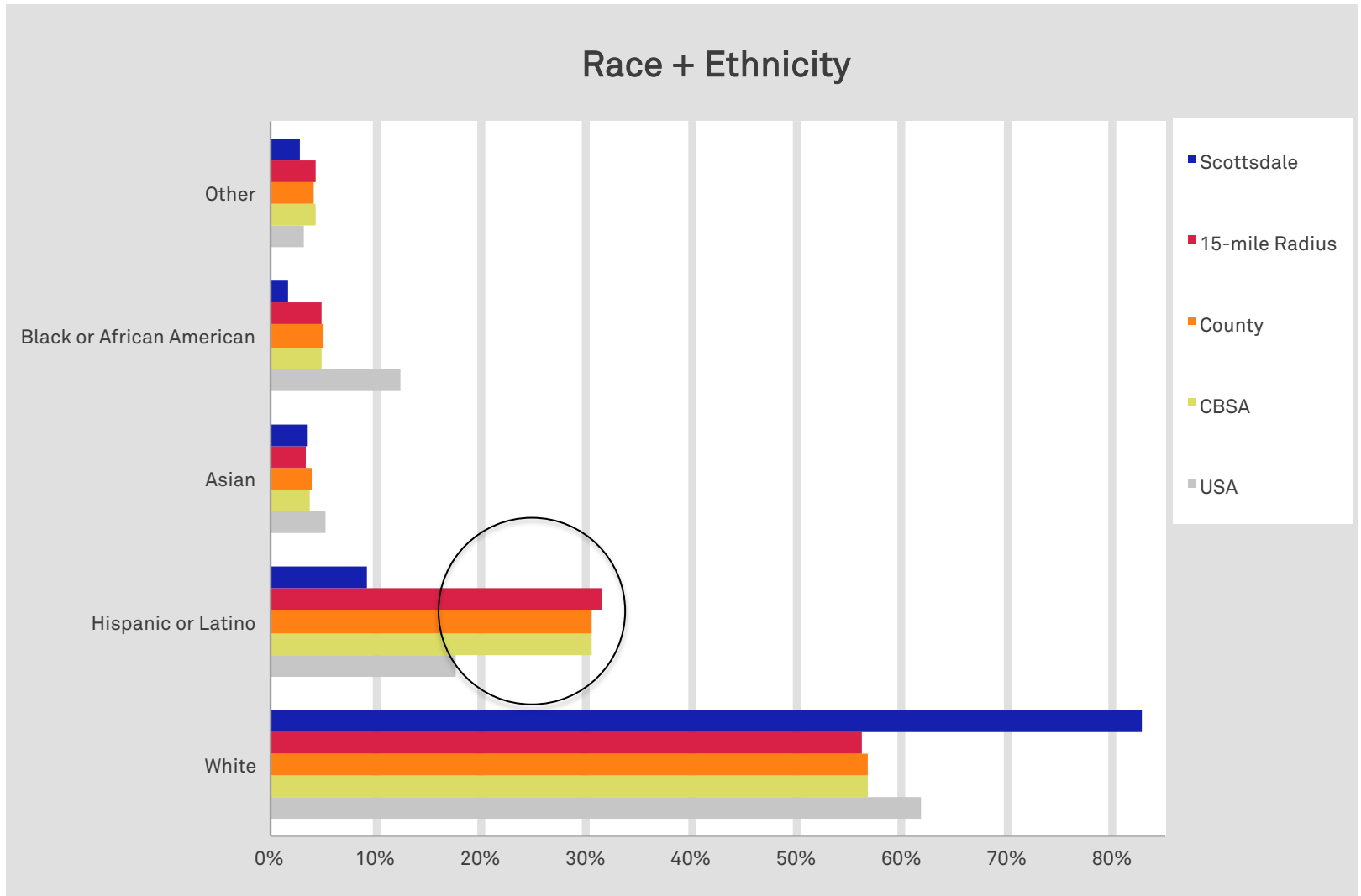
# Market characteristics



# Market characteristics



# Market characteristics



# Seasonal market

- \* Visit from October/November through April/May
- \* Canadians make up a large segment of the “snowbird” population
- \* Tend to be older, retired empty-nesters
- \* In Scottsdale, 9.9% of housing units have seasonal/recreational/occasional use:

## Housing Occupancy Source: U.S. Census Bureau, 2010 Census

**Total Housing Units - 124,001**

**Occupied Housing Units - 101,273 (81.7%)**

**Vacant Units - 22,728 (18.3%)**



Owner Occupied - 68,967 (55.6%)

Renter Occupied  
32,306 (26.1%)

Seasonal/  
Recreational/  
Occasional Use  
12,299 (9.9%)

Other  
10,429 (8.4%)

**Homeowner vacancy rate 4.4%**

**Rental vacancy rate 11.4%**



# Non-resident market

- \* From Longwoods International's *Scottsdale 2014 Visitor Report* (June 2015 Draft):
  - \* Found that:
    - \* In 2014, 8.3 person-trips were made to Scottsdale: 52% overnight, 48% day
    - \* Of overnight person-trips, 82% were for leisure, 13% for business, and 5% for business-leisure
    - \* 92% of day person-trips are for leisure
  - \* Day trip visitor details:
    - \* Spend an average of \$10 per person on 'Recreation/Sightseeing/Entertainment'
    - \* 41% are 'Visiting friends/relatives' and 16% are 'Touring'
    - \* 68% are traveling from Arizona, notably Phoenix (51%)
    - \* Travel year round, but largely from January through March (31%)
    - \* Average travel party includes 2.1 adults and .5 children
    - \* 6% travel for a 'Fair/exhibition/festival'
    - \* Activities of special interest include 'Historic places' (26%), 'Exceptional culinary experiences' (21%), and 'Cultural activities/attractions' (19%)



# Non-resident market

## \* Overnight trip visitor details:

- \* Spend an average \$24 on 'Recreation/Sightseeing/Entertainment'
- \* 47% are 'Visiting friends/relatives'; 9% are attending a 'Special event' or 'Touring'
- \* The majority of visitors are from California (25%) or Arizona (18%)
- \* 29% of visitors travel from January through March, 26% from April through June, 26% from October through December, and 19% from July through September
- \* The average length of an overnight trip is 5.3 nights, with 3.9 nights spent in Scottsdale
- \* The average party is 2.1 adults and .5 children
- \* Visitors get to Scottsdale by flying (49%) or driving (47% 'Own car/truck'; 36% 'Rental car')
- \* 34% of visitors stay at a 'Resort hotel'; 24% at 'Friends'/relatives' dwelling'; and 22% in a 'Hotel'
- \* Only 9% of overnight visitors reported attending a 'Fair/Exhibition/Festival', although 30% indicated 'Cultural activities/attractions' as activities of special interest



# Non-resident market

## \* Demographic profile

- \* 56% of overnight visitors and 49% of day visitors are male; 44% of overnight visitors and 51% of day visitors are female
- \* The average visitor is in his/her late 40s and comes from a 2-member household
- \* Income levels vary, although most fall into the 'Under \$49.9K', '\$50K-&74.9K', and '\$100-\$149K' income brackets
- \* The majority of visitors (65%) are 'Married/With partner' and most have 'No Children Under 18' (60%)
- \* Visitors are well educated and are almost equally divided between 'Full-time/Self-employed' and 'Not employed/Retired/Other'
- \* Visitors are predominately White and of non-Hispanic background





## Market conclusions

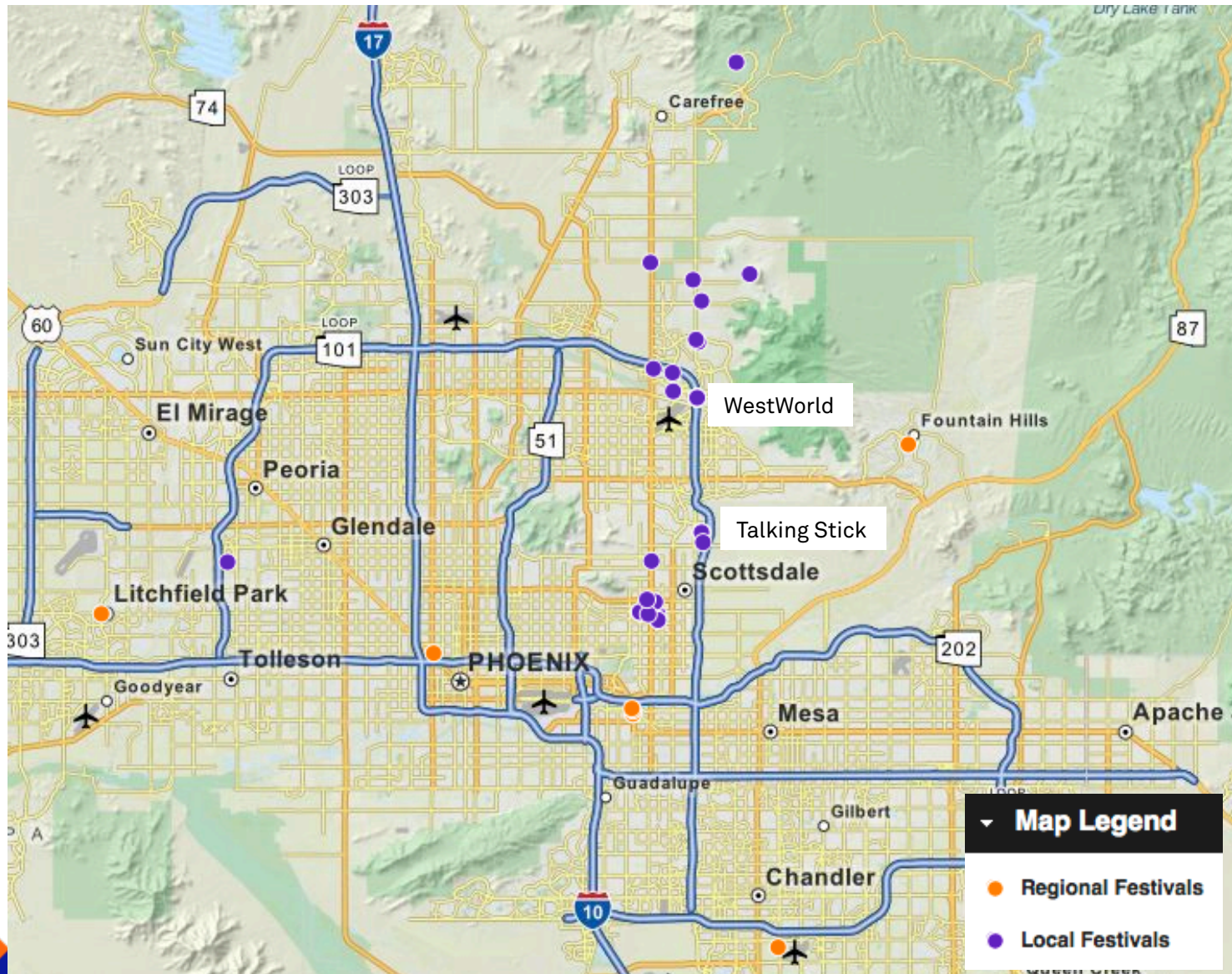
- \* Scottsdale and the region have growing populations
- \* In Scottsdale, the market can be characterized as aging, well-educated, and wealthy
- \* Regionally, the population skews younger, indicating a large number of families; this population has lower levels of income and educational attainment
- \* The regional population is more diverse than the Scottsdale population and has a particularly large Hispanic or Latino population
- \* There is a significantly sized seasonal population in both Scottsdale and the region
- \* Tourism plays a major role in the local economy, accounting for \$1.1 billion in overnight spending and \$256 million in day trip spending
- \* All of this indicates that, within the parameters of a larger festival or event, there are opportunities for diverse programs that appeal to multiple tastes and interests, including affordable, Spanish-language, and family oriented events and programs
- \* Key existing, local market segments:
  - \* Tourists
  - \* Aging adults
  - \* Young families
  - \* Hispanic or Latino population



# Festivals + Events



# Festivals + events



## Festivals + events: background

- \* Festivals and events play a large part in the local and regional economy
- \* Already, there are a handful of well-attended annual festivals and events that attract national and international visitors:
  - \* Spring Training
    - \* Scottsdale attendance (*Team: Giants*): 168,924
    - \* Salt River attendance (*Teams: Rockies + Diamondbacks*): 352,603
    - \* Total attendance (*Regional*): 1.89M
  - \* Waste Management Open (avg. attendance: 564,000)
  - \* Scottsdale Arabian Horse Show (avg. attendance: 350,000)
  - \* Barrett-Jackson Car Auction (avg. attendance: 300,000)
- \* In 2015, for Super Bowl XLIX, ESPN made Scottsdale's Fashion Square it's broadcast base
  - \* Included Fan Fest, a week-long series of events and celebrations that lead up to the game
  - \* Fan Fest had approximately 100,000 visitors and, in conjunction with other events, resulted in a 28% increase in January dining and entertainment spending in Scottsdale over the previous year; hotel/motel spending increased by 51%



## Festivals + events: tourism advisory task force

- \* Following the 2012 Strategic Plan, Tourism + Events formed a Tourism Advisory Task Force, which has been charged with implementing the Strategic Plan
- \* The Task Force has been conducting research into potential events
  - \* Interest in arts, Arizona cultures, and science and technology as themes
  - \* Suggested 10-21 day event period in October/November



# Festivals + events: tourism advisory task force case studies

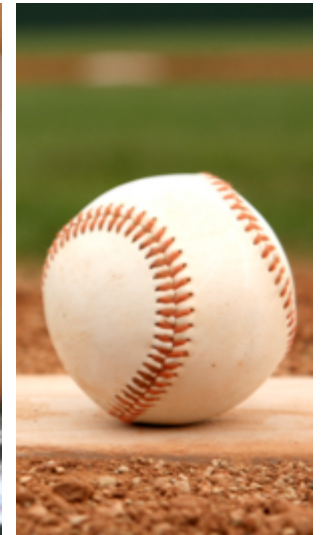


## Festivals + events: challenges

- \* City's dense downtown lacks large spaces for gathering
- \* Millennial vs. Baby Boomer interests and modes of participation
- \* Small corporate base + seasonal population make fundraising a challenge
- \* Segments of Scottsdale's locally-owned, downtown businesses feel they are negatively impacted by Scottsdale's current events and are reluctant to support a new one
- \* Poor connectivity between downtown and North Scottsdale
- \* Increasing competition for events nationally
- \* Destination events require initiative and significant resources, including staff and time
- \* Creating something that is both new and innovative yet authentic to Scottsdale



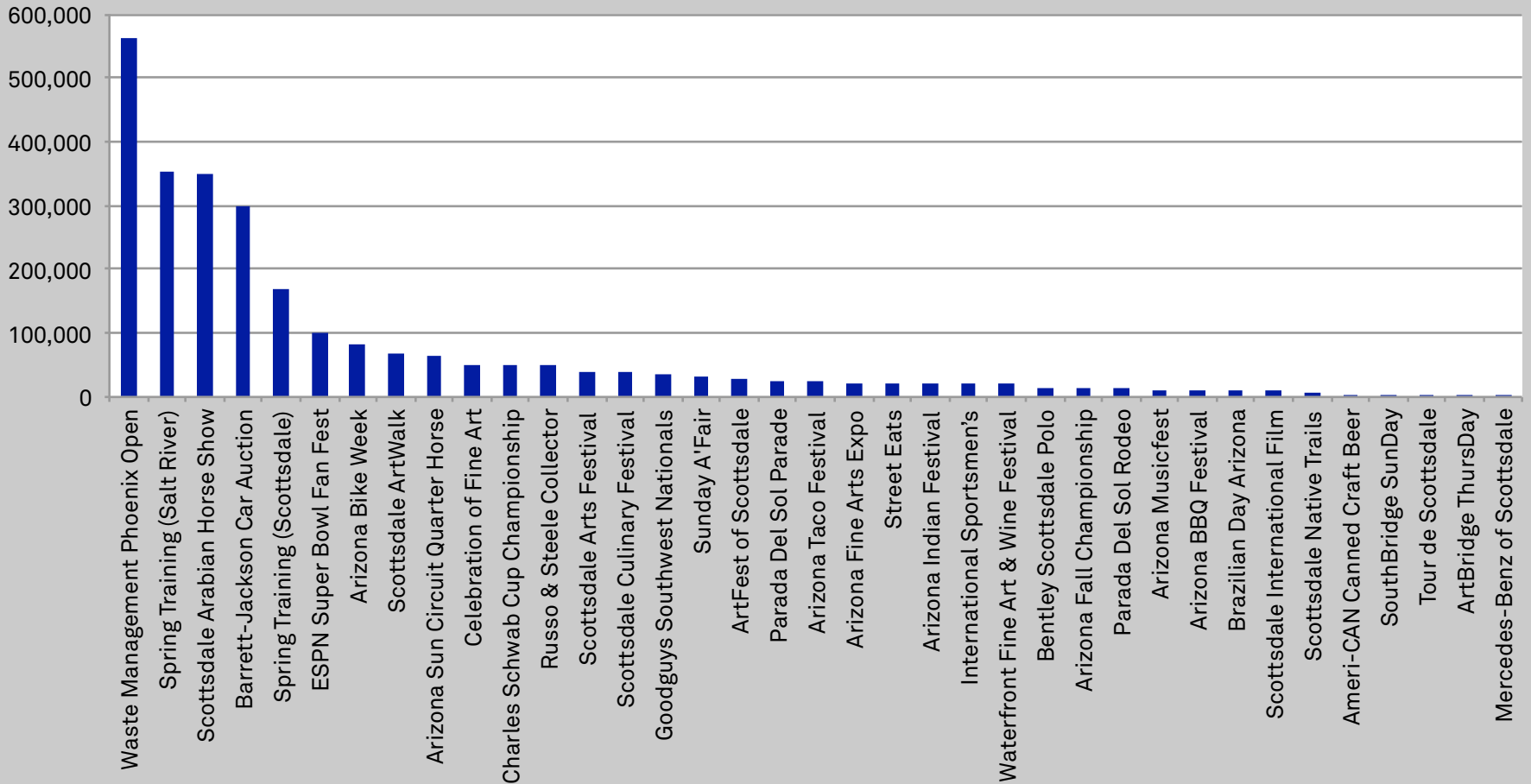
# Festivals + events: common themes in current inventory





# Festivals + events: attendance

## Scottsdale Festivals by Attendance

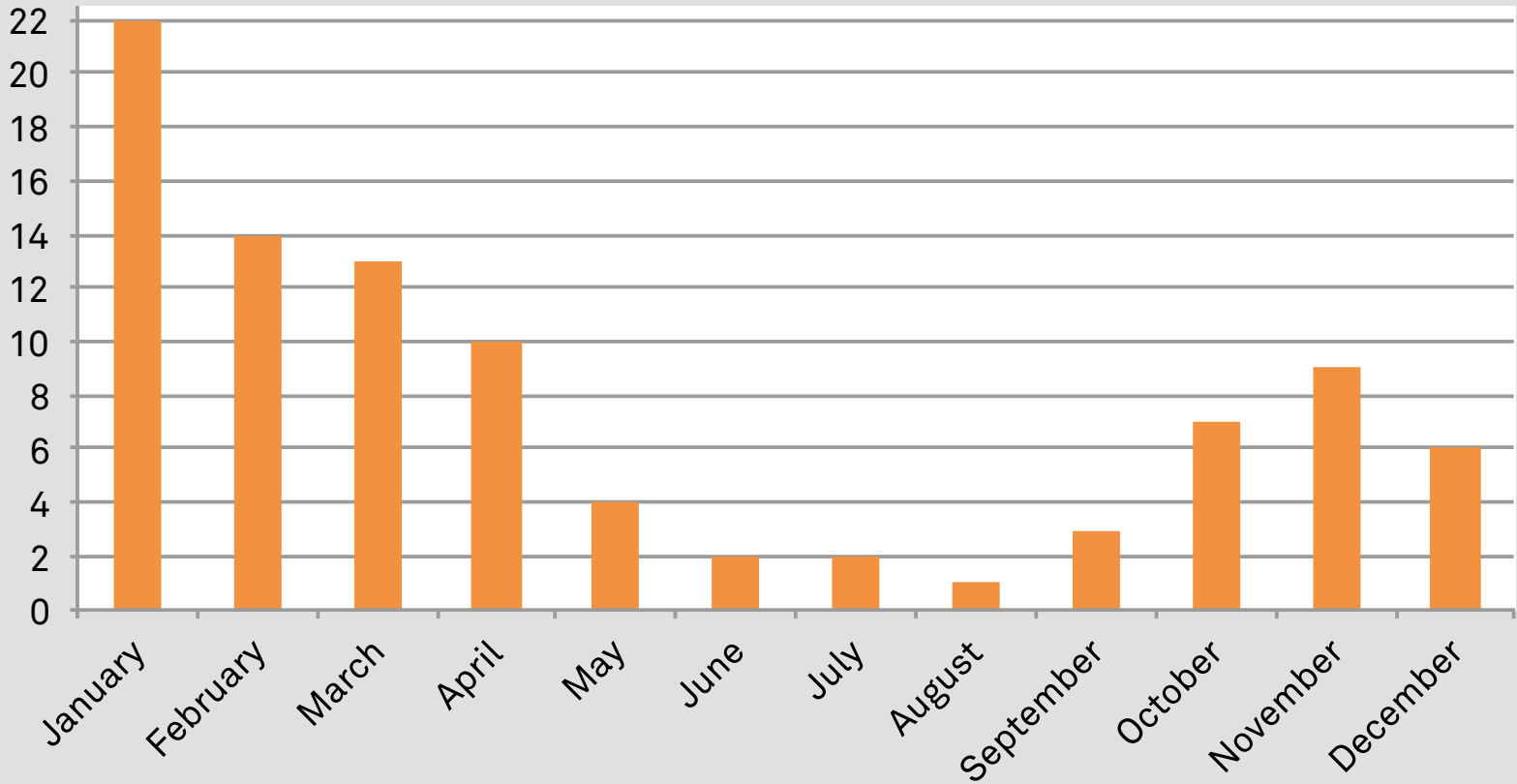


\*Attendance ranges from 2,000 to 564,000 attendees. Chart does not include total regional attendance for Spring Training, which was 1.89M in 2015.



# Festivals + events: calendar

## Scottsdale Events per Month



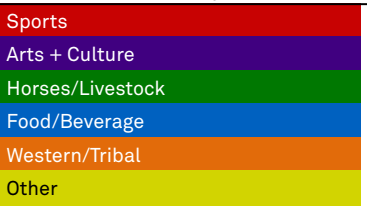
# Festivals + events: time of year + duration

		January				February				March				April				May				June				July				August				September				October				November				December				
		Attendance																																																
Large	Spring Training (Regional)	1,894,010																																																
	Waste Management Phoenix Open	564,000																																																
	ESPN Super Bowl Fan Fest	500,000																																																
	Spring Training (Salt River)	352,603																																																
	Scottsdale Arabian Horse Show	350,000																																																
	Barrett-Jackson Car Auction	300,000																																																
	Spring Training (Scottsdale)	168,924																																																
	Tostitos Fiesta Bowl	118,456																																																
Medium	Arizona Bike Week	82,801																																																
	Scottsdale ArtWalk	69,800																																																
	Arizona Sun Circuit Quarter Horse Show	65,000																																																
	Charles Schwab Cup Championship	50,000																																																
	Russo + Steele Collector Automobile Auction	48,300																																																
	Scottsdale Arts Festival	40,000																																																
	Scottsdale Culinary Festival	40,000																																																
	Goodguys Southwest Nationals	35,000																																																
	Sunday A'Fair	33,000																																																
	Canal Convergence	30,000																																																
	ArtFest of Scottsdale	30,000																																																
	Arizona Taco Festival	25,000																																																
	Celebration of Fine Art	51,000																																																
	Parada Del Sol Parade	25,000																																																
	Arizona Fine Art Expo	22,000																																																
	Street Eats	20,000																																																
	Arizona Indian Festival	20,000																																																
	Waterfront Fine Art & Wine Festival	20,000																																																
	International Sportsmen's Exposition and Arizona Boat Show	20,000																																																
	Bentley Scottsdale Polo Championships: Horses and Horsepower	15,000																																																
Arizona Fall Championship	14,000																																																	
Parada Del Sol Rodeo	13,504																																																	
Small	Arizona Musicfest*	11,000																																																
	Arizona BBQ Festival	10,000																																																
	Brazilian Day Arizona	10,000																																																
	Scottsdale International Film Festival	9,000																																																
	Arizona National Horse Show	5,000																																																
	Scottsdale Native Trails	5,000																																																
	Ameri-CAN Canned Craft Beer Festival	3,500																																																
	SouthBridge SunDay	3,000																																																
	ArtBridge ThursDay	2,000																																																
	Mercedes-Benz of Scottsdale Rugby Bowl: Beauty and the Beast	2,000																																																
	Tour de Scottsdale	2,000 (riders)																																																
	Hashknife Pony Express	1,000																																																
Attendance Unknown	5th Ave Art Festival																																																	
	Arabian National Breeder Finals																																																	
	Arizona Indian Festival (Super Bowl)																																																	
	Brewer's Bowl																																																	
	Collector's ArtWalk																																																	
	Cowboy Christmas																																																	
	Gooding & Company Scottsdale Auction																																																	
	Scottsdale Beer + Music Festival																																																	
	Scottsdale Beer Palooza																																																	
	Scottsdale Rockin' West Fest																																																	
	Talking Stick Festival																																																	
	Taste Tequila																																																	
The Original Taste																																																		



# Festivals + events: time of year + duration of local + regional large-scale events

		January				February				March				April				May				June				July				August				September				October				November				December			
Attendance		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Local	Spring Training (Regional)	1,894,010																																															
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Tostitos Fiesta Bowl	118,456																																																
Regional	Arizona State Fair	1,147,000																																															
	Tempe Festival of the Arts	250,000																																															
	Fountain Hills Festival of Arts + Crafts	200,000																																															
	Tempe Oktoberfest	150,000																																															
	Chandler Ostrich Festival	100,000																																															
	Fiesta Bowl Block Party	100,000																																															



## Potential local partners

- \* Task Force research identified the following partners:
  - \* Downtown merchants + retailers
  - \* Gallery owners
  - \* Restaurants + bars
  - \* Hotels
  - \* Cultural organizations
  - \* Venue owners
- \* Other potential partners might include:
  - \* Arizona State University
  - \* GoDaddy
  - \* Live Nation
  - \* Talking Stick
  - \* Yelp
- \* Anecdotal research indicates that Scottsdale cultural organizations and hotels are eager to partner for an event, but that gallery owners and downtown retailers might take more convincing given their current frustration with events in North Scottsdale and downtown
- \* Generally, however, a successful destination event will require strong media, brand, and/or celebrity partners



## Current festivals + events: conclusion

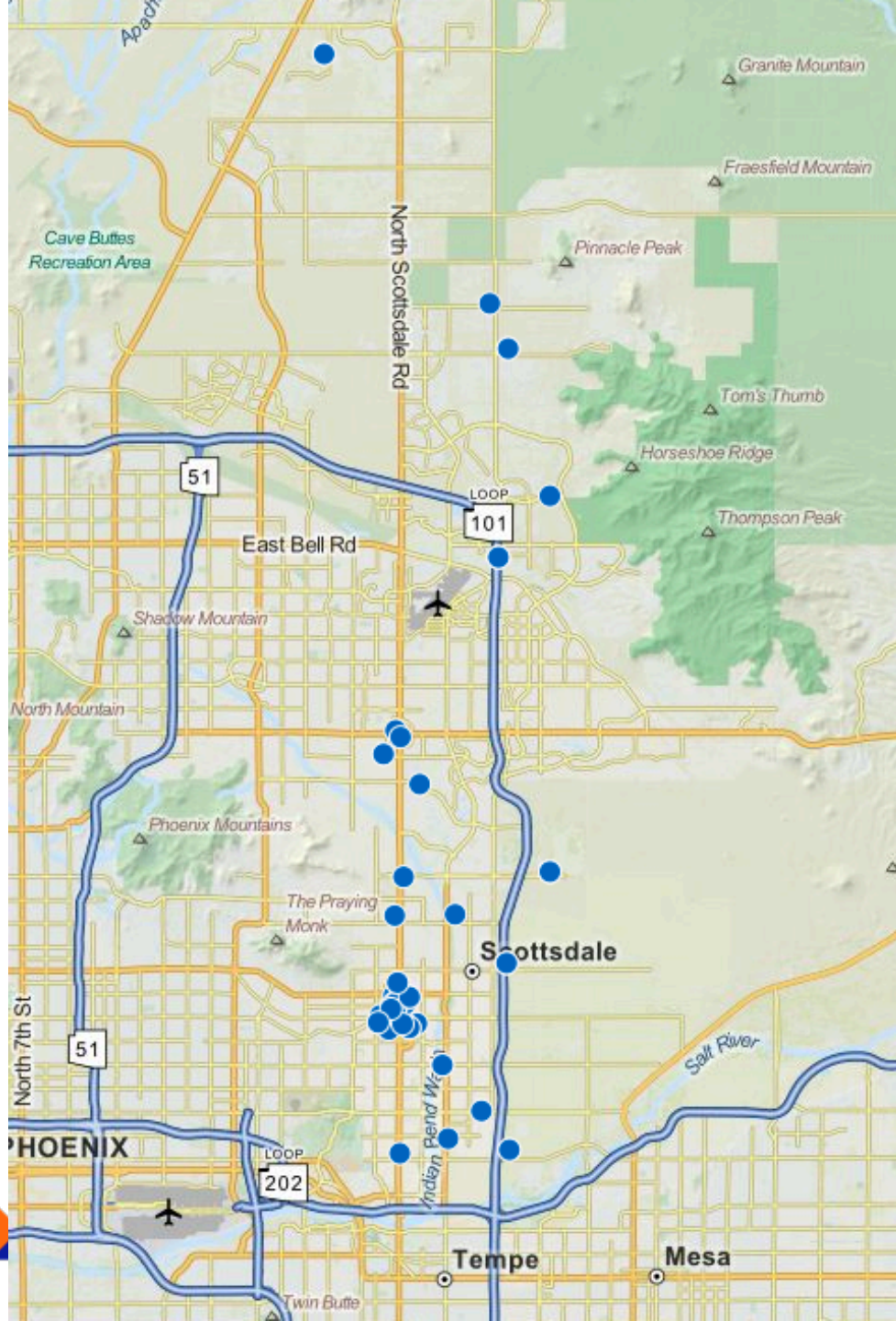
- \* The local and regional market is festival/event heavy
- \* Events vary in size, duration, and theme, but most are one day and have an attendance of 20,000 or less
- \* Common festival themes include fine art, food, horses and livestock, cars, sports, Western/Tribal culture
- \* January is the busiest month for festivals/events in Scottsdale, followed by February and March
- \* Summer months have the fewest events
- \* The Scottsdale/Phoenix event market is somewhat fluid—some events are split between venues in both locations, some move location from one city to the next from year to year, and so on
- \* Strong partnerships will be imperative to the success of the event; these will need to include media/brand/celebrity partnerships
- \* Overall, there is duplication in event themes and types; however, when looking specifically at large-scale events in Scottsdale, there is a gap for a fall event with an arts/entertainment, food, and/or Western/Tribal theme
- \* Regionally, large-scale events tend to happen in the fall; they are, however, shorter in duration, lasting only one to three days



# Facilities



# Existing Scottsdale facilities: indoor





# Existing Scottsdale facilities: indoor facility inventory excerpt\*

## Facility Inventory: Scottsdale, AZ

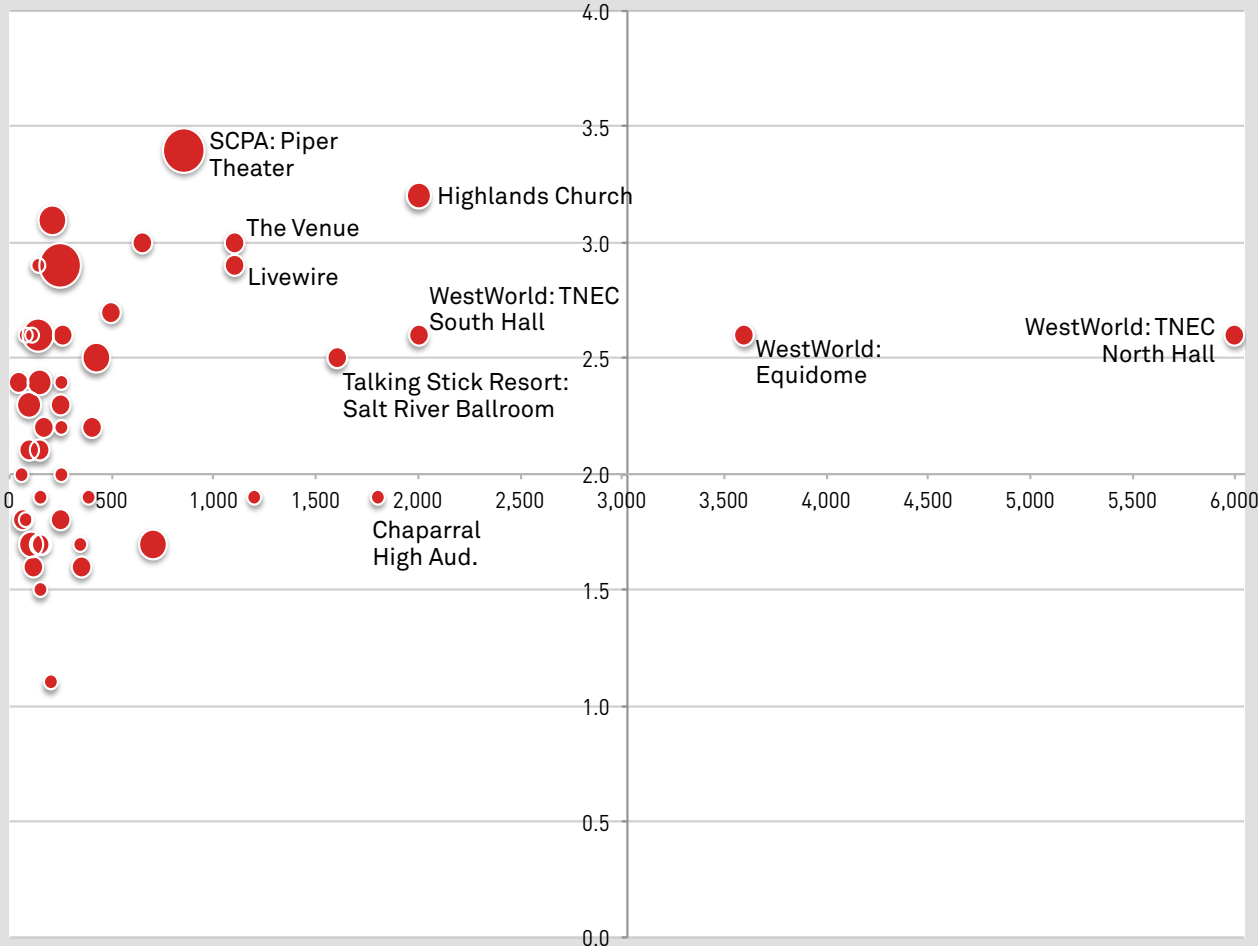
Local Facilities	Type	Facility	Cap.	Event Types Supported	Facility Rating							Presenting Activity														Producing Activity				Rental Activity						
					Facility Condition	Staff and Support	Theatrical Functionality	Acoustics	Customer Amenities	User Amenities	Atmosphere/Character	Suitability for Users	Rating	Broadway	Off-Broadway	Dance	Music	Theatre	Film	Headliner/Popular Music	Opera	Family	Comedy	Spoken Word	Lectures	Puppetry	Cultural	Performing Arts	Academic/Educational	Festivals	Cultural	Cultural Organizations	Touring Broadway	School/College	Private Events	Promoter
					4	3	2	1	3	2	2	2.6																								
Other	WestWorld: TNEC North Hall	6,000	2	4	3	2	1	3	2	2	2	2.6																								
Other	WestWorld: Equidome	3,600	2	4	3	2	1	3	2	2	2	2.6																								
Other	WestWorld: TNEC South Hall	2,000	2	4	3	2	1	3	2	2	2	2.6																								
Church	Highlands Church	2,000	3	4	3	3	3	3	3	3	3	3.2																								
Performa	Sonoran Desert Center for the Arts*	2,000	0	4	3	4	3	4	3	4	3	3.5																								
School/U	Chaparral High School: Auditorium*	1,800	1	3	1	2	2	1	2	2	2	1.9																								
Other	Talking Stick Resort: Salt River Ballroom	1,600	2	3	3	1	2	4	2	2	2	2.5																								
School/U	Saguaro High School*	1,200	1	3	1	2	2	1	2	2	2	1.9																								
Other	The Venue Scottsdale	1,100	2	4	3	2	2	4	3	3	2	3.0																								
Music	Livewire	1,100	2	4	2	3	2	2	2	4	4	2.9																								
Performa	SCPA: Virginia G. Piper Theater	853	9	4	4	3	3	3	3	3	3	3.4																								
Church	Pinnacle Presbyterian Church	700	4	3	1	1	2	1	1	2	2	1.7																								
Music	Talking Stick Resort:The Showroom	650	2	3	3	3	3	4	3	2	3	3.0																								
Other	Wasted Grain: Main Room	500	2	4	2	2	2	3	2	3	3	2.7																								

\*A full facility inventory can be found in the appendix.



# Existing Scottsdale facilities—indoor: capacity + quality

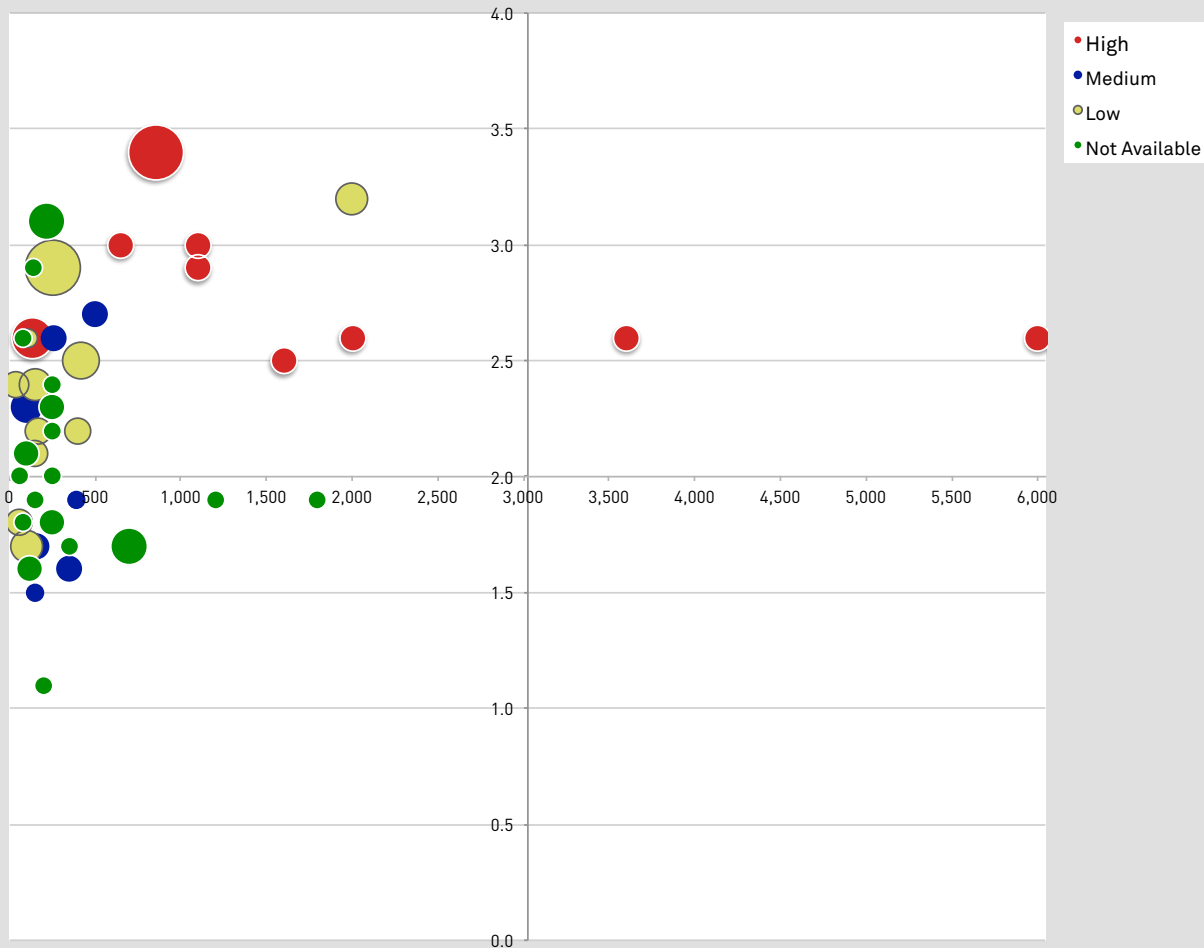
**Facility Rating vs. Capacity  
(Scottsdale)**



WestWorld: TNEC North Hall	6,000
WestWorld: Equidome	3,600
WestWorld: TNEC South Hall	2,000
Highlands Church	2,000
Sonoran Desert Center for the Arts <sup>o</sup>	2,000
Chaparral High School: Auditorium*	1,800
Talking Stick Resort: Salt River Ballroom	1,600
Saguaro High School*	1,200
The Venue Scottsdale	1,100
Livewire	1,100
SCPA: Virginia G. Piper Theater	853
Pinnacle Presbyterian Church	700
Talking Stick Resort: The Showroom	650
Wasted Grain: Main Room	500
Cactus Shadows Fine Arts Center: Mainstage	420
Culinary Dropout	400
The Casablanca Lounge	390
Pub Rock	350
Pranksters Too*	350
Dierks Bentley's Whiskey Row	255
Arizona State University: Kerr Cultural Center	250
Casino Arizona: The Showroom	250
Casino Arizona: Arizona Room	250
Arizona Music + Entertainment Hall of Fame*	250
SCC PAC	250
The Homestead Playhouse	250
Stagebrush Theatre	211
Rogue Bar	200
Stand Up Scottsdale	170
Rock Bar	152
Cactus Shadows Fine Arts Center: Black Box	150
Chaparral High School: Black Box*	150
Kazimierz World Wine Bar	150
El Dorado Bar + Grill*	150
Handlebar J Restaurant + Saloon	150
SCPA: Stage 2	137
Desert Stages Theatre	136
Dirty Dogg Saloon*	120
Hi-Fi Kitchen + Cocktails	105
Comedy Spot	100
Sonoran Desert Center for the Arts: Studio <sup>o</sup>	100
SCC PAC: Black Box*	99
Theatre Artists Studio: Mainstage	96
Rusty Spur*	75
Hyatt Regency: Center Stage Bar*	75
Desert Stages Theatre: Actor's Café	60
5th + Wine	60
Hotel Valley Ho: ZuZu Lounge	40

# Existing Scottsdale facilities—indoor: availability

**Facility Rating vs. Capacity**  
Availability  
(Scottsdale)



WestWorld: TNEC North Hall	6,000
WestWorld: Equidome	3,600
WestWorld: TNEC South Hall	2,000
Highlands Church	2,000
Sonoran Desert Center for the Arts <sup>o</sup>	2,000
Chaparral High School: Auditorium*	1,800
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Desert Stages Theatre: Actor's Café	60
5th + Wine	60
Hotel Valley Ho: ZuZu Lounge	40

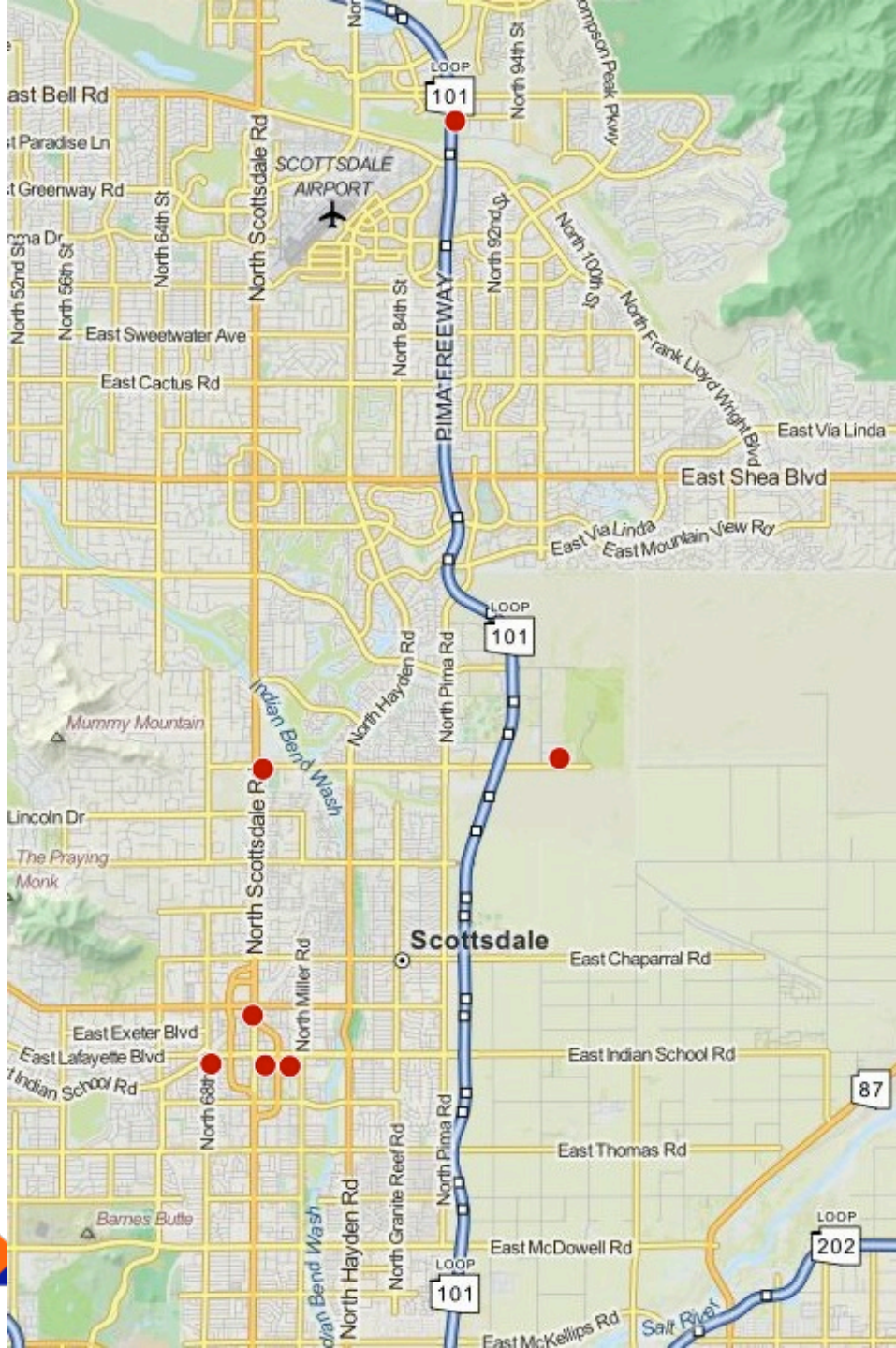
# Existing Scottsdale facilities—indoor: venue type

**Facility Rating vs. Capacity**  
*Type*  
*(Scottsdale)*



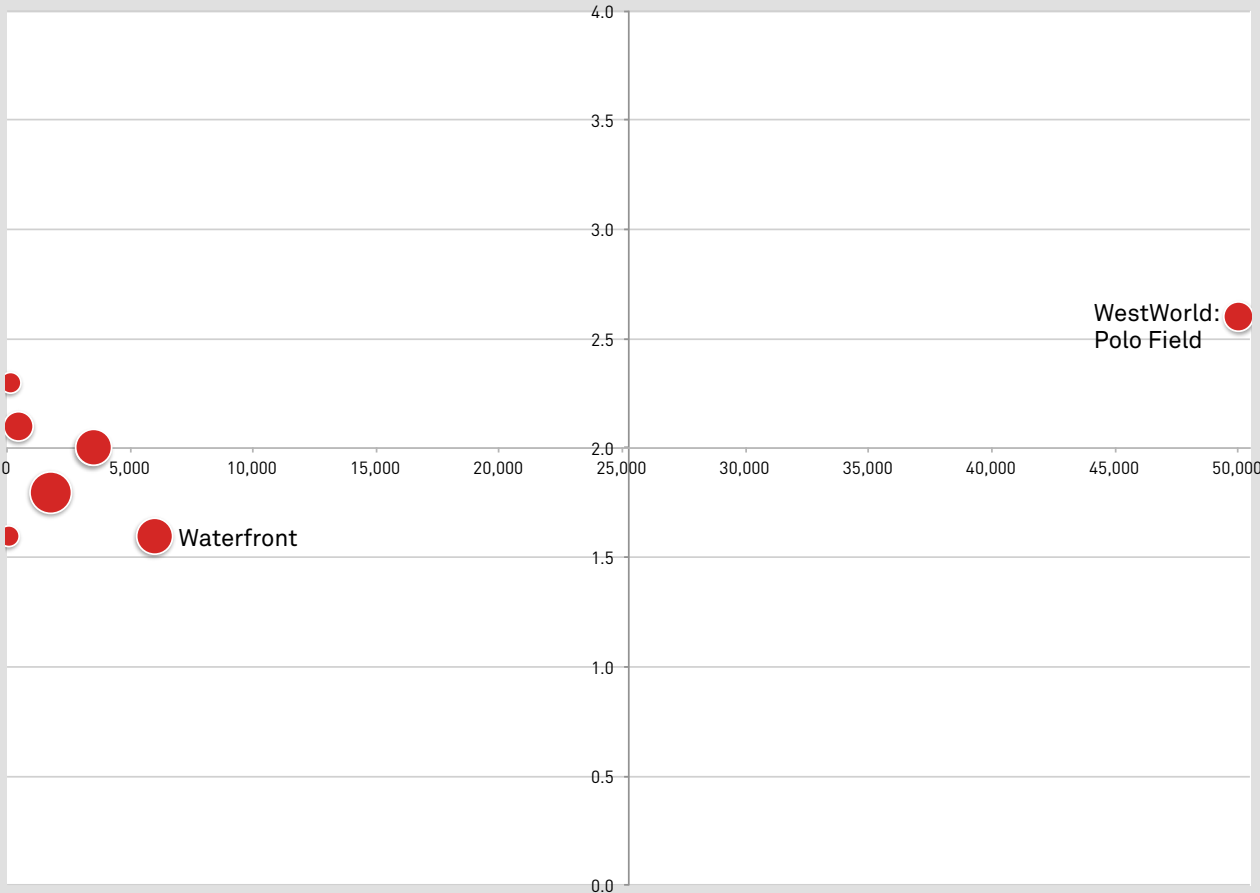
WestWorld: TNEC North Hall	6,000
WestWorld: Equidome	3,600
WestWorld: TNEC South Hall	2,000
Highlands Church	2,000
Sonoran Desert Center for the Arts <sup>o</sup>	2,000
Chaparral High School: Auditorium*	1,800
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Hyatt Regency: Center Stage Bar*	75
Desert Stages Theatre: Actor's Café	60
5th + Wine	60
Hotel Valley Ho: ZuZu Lounge	40

# Existing Scottsdale facilities: outdoor



# Existing Scottsdale facilities—outdoor: capacity + quality

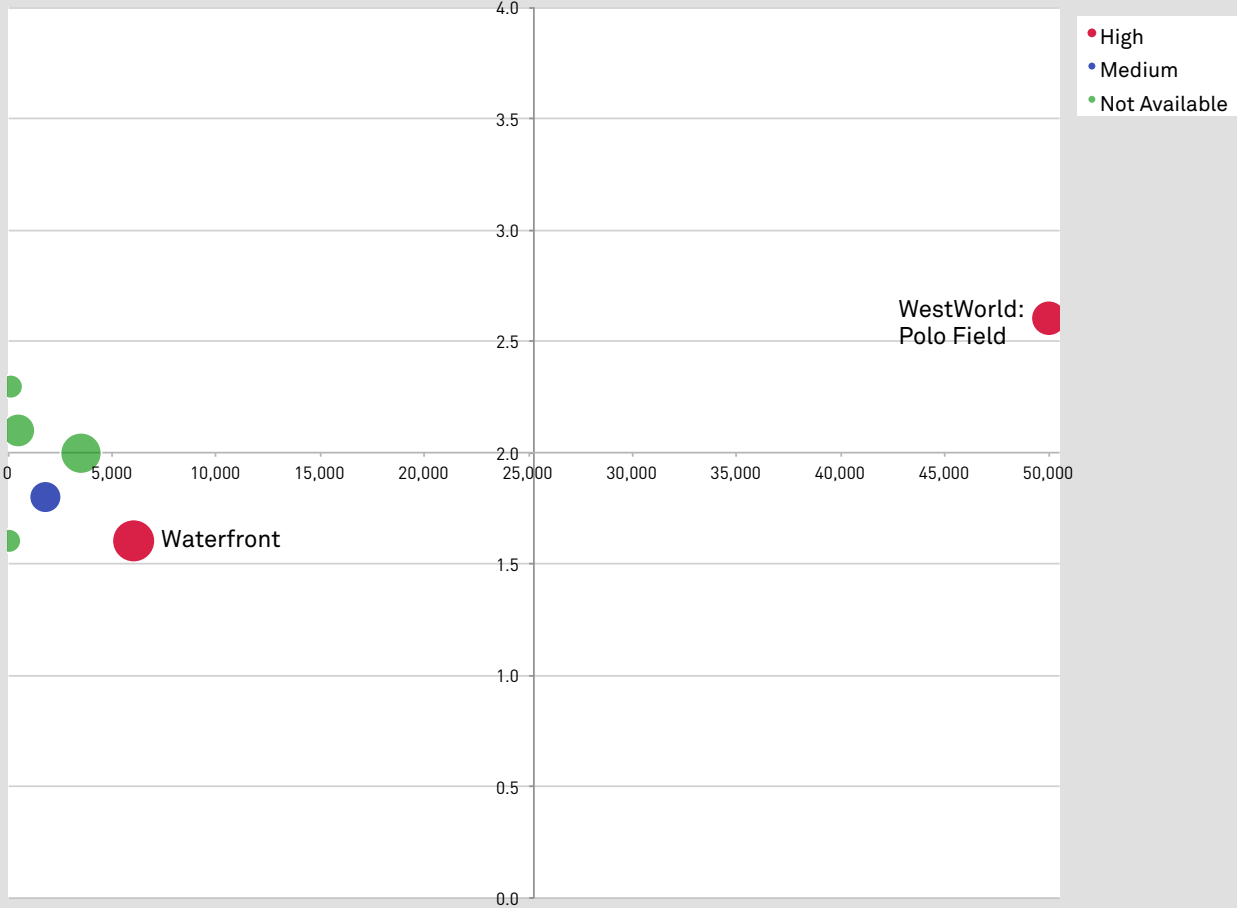
**Facility Rating vs. Capacity  
Outdoor Facilities  
(Scottsdale)**



WestWorld: Polo Field	50,000
Waterfront	6,000
McCormick-Stillman Railroad Park	3,500
SCPA: Amphitheater	1,800
Talking Stick Resort: The Pool*	500
Hotel Vally Ho: OH Pool Bar + Cabanas*	150
Old Town Tavern: Outdoor Stage*	75

# Existing Scottsdale facilities—outdoor: availability\*

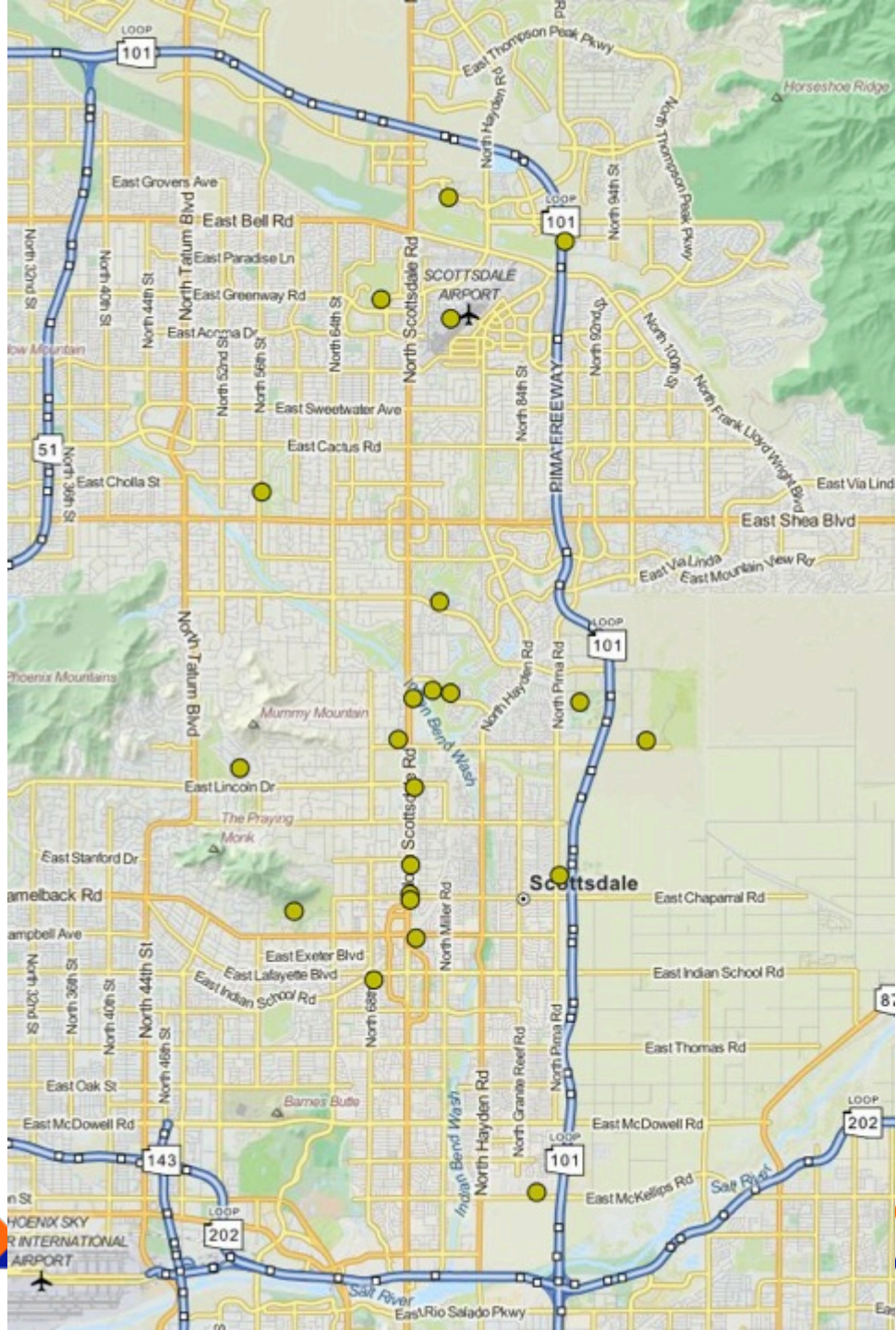
**Facility Rating vs. Capacity**  
**Outdoor Facilities**  
*Availability (Scottsdale)*



WestWorld: Polo Field	50,000
Waterfront	6,000
McCormick-Stillman Railroad Park	3,500
SCPA: Amphitheater	1,800
Talking Stick Resort: The Pool*	500
Hotel Vally Ho: OH Pool Bar + Cabanas*	150
Old Town Tavern: Outdoor Stage*	75

*\*Availability considers whether a space has no, low, medium, or high availability on prime dates (Thursdays through Sundays, September through May)*

# Existing Scottsdale facilities: meetings + events





# Existing Scottsdale facilities: meetings + events

## Scottsdale Facility Inventory: Meeting + Event Facilities

Facilities w/ 300+ capacity event spaces

Facilities	Meeting Room 1	Meeting Room 2	Meeting Room 3	Meeting Room 4	Meeting Room 5	Additional Meeting Rooms	Partitions/Divisible Spaces	Sound/AV Services	Equipment for Rent	Free Wireless/Internet	Business Center	On-site Catering/Kitchen	Restaurant/Café/Bar	Outdoor Space
The Westin Kerland Resort + Spa	3,601	2,005	1,545	1,380	1,216									
Talking Stick Resort	2,666	2,000	2,000	1,333	1,277									
The Phoenician	2,500	1,394	600	80	60									
Fairmont Scottsdale Princess	2,486	2,500	860	623	200									
JW Marriott Scottsdale Camelback Inn Resort + Spa	2,100	1,200	1,050	400	380									
DoubleTree Resort by Hilton Hotel Paradise Valley-Scottsdale	1,800	1,000	330	200	105									
We-Ko-Pa Resort + Conference Center	1,800	280	280	120	56									
Hyatt Regency Scottsdale Resort + Spa at Gainey Ranch	1,500	1,100	600	260	200									
Chaparral Suites Scottsdale	1,400	462	336	332	160									
Hilton Scottsdale Resort + Villas	1,240	980	572	420	190									
The Scottsdale Plaza Resort	1,200	350	300	200	175									
Scottsdale Hangar Events*	1,000	800	800											
The Scottsdale Resort at McCormick Ranch	1,000	605	365	334	294									
Firesky Resort + Spa	720	480	250	210	75									
Hotel Valley Ho	500	256	250	128	60									
Four Seasons Resort Scottsdale at Troon North	470	450	200	50	40									
Monterra at Westworld	430	240	190	75										
McCormick Ranch Golf Club	400													
Orange Tree Golf Resort	350	270	128	56	20									
Salt River Fields	350	200												
W Scottsdale	340	140	140	80	70									
The McCormick Scottsdale	300	210	100	40	30									
Courtyard by Marriott Scottsdale Salt River	300	140	140	65	65									

83% 87% 83% 57% 61% 78% 96% 91% 100%

\*Assessment based on some estimations.



# Existing Scottsdale facilities: conclusions

## \* Indoor facilities

- \* Other than WestWorld, there are few venues capable of accommodating destination event-sized crowds, particularly in downtown Scottsdale
- \* Facilities with capacities of 1,000 or more include Highlands Church, Chapparral High School's Auditorium, Talking Stick Resort's Salt River Ballroom, Saguaro High School's Auditorium, The Venue Scottsdale, and Livewire
- \* Presenting activity is dominated by music, although there are very few large capacity, high quality, music venues
- \* Facilities are well-equipped with lighting, sound, and film/projection equipment
- \* 50% of facilities have flexible seating; this is largely due to the fact that many of the inventoried facilities are bars or music venues
- \* Facilities have limited availability for outside uses and users

## \* Outdoor facilities

- \* Outdoor facilities vary in quality and capacity; but, once again, the largest is WestWorld's Polo Field
- \* Downtown, the largest outdoor area is the Waterfront
- \* Most performance areas are grassy spaces with temporary, moveable stages (Tempe Beach and Osuna Parks, for example)
- \* Outdoor spaces are used throughout the year, although most avoid programming in summer months
- \* Spaces are largely used for outdoor music, festivals, and events



## Existing Scottsdale facilities: conclusions

### \* Meeting + event facilities

- \* Scottsdale's inventory of large meeting and event facilities is predominately comprised of hotel and resort spaces
  - \* A good number are located in close proximity to Old Town
  - \* All facilities have outdoor spaces that can be used for breakout events, happy hours, or other happenings
  - \* Technical capabilities tend to be rather advanced, with some facilities giving event producers/coordinators the option to rent additional equipment
- \* Scottsdale facilities that could potentially be used to host festival/event activities include:
- \* The Waterfront
  - \* The Scottsdale Center for the Performing Arts Piper Theater + Amphitheatre
  - \* The Venue Scottsdale
  - \* The Phoenician
  - \* DoubleTree Resort by Hilton Hotel
  - \* Chaparral Suites
  - \* Firesky Resort + Spa
  - \* Hotel Valley Ho



# Destination Events: Benefits + Impacts



# Destination events: benefits + impacts

## Scottsdale Hospitality + Tourism: A Five Year Strategic Plan for Scottsdale (2012)

- \* Found that tourism in Scottsdale is highly seasonal and dependent on the resort market
- \* Recommended that Scottsdale:
  - \* Create a lively and prosperous downtown
  - \* Create an AZ Central facility, positioning itself as the tourism hub of Arizona
  - \* Create an “animated” experience with small events, rituals, and festivals that would make the downtown attractive to locals and visitors
  - \* Create a funding and management structure to keep such experiences going
  - \* Reposition the City’s tourism strategy so that it is less resort-centric and more destination-centric
- \* In regards to developing tourism-related events, the Strategic Plan suggested the following:
  - \* Develop an understanding that building events is a full-time endeavor
  - \* Build leisure demand and, in the shoulder and off-season, develop an event that runs over a period of weeks
  - \* Develop a second event of similar magnitude but different content in another down period
  - \* Consider relying on one producer to produce both events



# Destination events: benefits + impacts

## Scottsdale General Plan 2035 *(under review)*

### \* Vision Statement:

\* “Scottsdale will be an exceptional Sonoran Desert experience and the premier southwestern tourist destination. Our diverse neighborhoods will foster outstanding livability through connected, healthy and sustainable communities. Scottsdale will thrive by attracting and retaining business centers of excellence that encourage innovation and prosperity.”

### \* The first chapter of the Plan outlines five goals for arts, culture, and creativity:

1. Build on Scottsdale’s reputation as the regional leader and widely-recognized destination in arts, culture, and creativity
2. Continue to support, plan for, and manage Scottsdale’s arts and culture programs and facilities
3. Encourage creative placemaking to revitalize neighborhoods, enhance sense of place, celebrate cultural heritage, and strengthen community character
4. Identify and protect Scottsdale’s historic, archaeological, and cultural resources, to promote awareness and sustain community character
5. Promote a creative community through education and exposure to the creative process



# Destination events: benefits + impacts

- \* The seventh chapter outlines goals for economic vitality, including:
  - \* Strengthen Scottsdale's position as a premier regional, national, and international tourism and resort destination
  - \* Policies for achieving this goal include:
    1. Support the development and revitalization of hotels and resorts
    2. Accommodate diverse, high-quality lodging and tourism market segments
    3. Preserve Scottsdale's natural, social, and cultural environments
    4. Enhance tourism support services
    5. Provide destination attractions and events that celebrate Scottsdale's heritage; including, the key theme areas of the arts, southwestern culture, Native American culture, cowboy/western lore, and the Sonoran Desert
    6. Build on ability to attract sporting events/entertainment opportunities, and signature special events
    7. Provide multimodal transportation choices and regional links
    8. Provide scenic, outdoor, educational, and regional facilities for visitors
    9. Preserve historical and archeological tourist destination attractions
    10. Encourage and maintain high-quality retail, event experiences, and entertainment activities
    11. Continue to support a concentration of visitor services and experiences in the downtown area
    12. Advocate the development of new retail opportunities



## Destination events: benefits + impacts

- \* A new event in Scottsdale has the potential to help the City meet many of the goals outlined prior, particularly in regard to reputation building, placemaking, creative community support, and retail attraction
- \* Additionally, it could help the Tourism and Events Department reach the goals outlined at the beginning of this presentation:
  - \* Activate downtown Scottsdale with increased foot traffic and activities;
  - \* Increase Scottsdale's international profile and reputation as a destination;
  - \* Expand tourism into the shoulder season; and
  - \* Reinvigorate the City's positioning within the overall tourism industry





## Destination events: benefits + impacts

- \* Additional benefits and impacts include:
  - \* ***Sense of Place + Quality of Life:*** Events that engage the public have potential to contribute to the character and identity of a community. These types of events provide opportunities for socialization, enhance the sense of community, and provide hands-on experiences attractive to regional residents—all contributing to the community's quality of life.
  - \* ***Quality of Workforce + Corporate Recruitment:*** Studies suggest that strong arts and cultural communities rank among the top factors for decision makers when considering relocation for employment opportunities. The development and positioning of unique and diverse cultural opportunities is proof of a public commitment to maintain, and even improve, the quality of its workforce.



## Destination events—benefits + impacts: conclusions

There is a case to develop a destination event or festival based on:

- \* ***The market:*** Scottsdale is already established as a tourism destination and is currently home to a number of festivals/events. In addition to its resident population—which is well-educated and affluent—the region is attractive to snowbirds and retirees. Regionally, the population is younger and more diverse. This indicates a need for an event that appeals to multiple interests and tastes.
- \* ***Existing festivals:*** There are a number of festivals/events in Scottsdale already, including a handful of large-scale, well-attended happenings. While there is some duplication and saturation in the overall festival/event inventory, there are gaps within the major events that take place, particularly in art, food, and culture.
- \* ***Existing facilities:*** Scottsdale and the surrounding area have a multitude of small venues. Downtown Scottsdale, in particular, has a very limited number indoor or outdoor facilities capable of accommodating a large-scale event. There are, however, nearby hotels and resorts with large-capacity ballrooms and event spaces. Therefore, a destination event in Scottsdale will most likely either need to take place across multiple, well-connected venues or will need to expand into existing parks, fields, or facilities in other cities in the region.
- \* ***Community benefits + impacts:*** Scottsdale is recognized as a leader in the tourism industry. A new event/festival could help the City maintain this positioning while defining its role in the market in the future. Additionally, a destination event/festival could help the City to achieve many of the goals outlined in the Scottsdale General Plan 2035.



# Recommendations



## approaches

Based on the research we've conducted on the origins of other international and national destination events, we believe there are five basic approaches to developing a destination event in Scottsdale:

1. Create an event that encompasses a large, new element but that also embraces local, pre-existing themes, happenings, etc.
2. Relocate, or create a satellite location, for an already branded event
3. Package a set of Scottsdale's pre-existing festivals and events into a larger, long-term festival
4. Select an existing Scottsdale event that can be grown and developed to the level of a destination event
5. Create a brand new event

\*Note that the answer might be a combination of these approaches



## Relocated or satellite event

- \* **What:** Transfer an event that already has a national and/or international reputation to Scottsdale, making the city the event's new, permanent home or a satellite location that allows it to explore a specific theme.
- \* **Why:** A festival like South by Southwest, Spoleto, or the Edinburgh International Festival has an international audience that is already familiar with the event's brand and programming.



## Festival of the Two Worlds/ Spoleto Festival

- \* The Festival dei due Mondi (Festival of the Two Worlds) is an annual summer festival that features concerts, opera, dance, drama, visual arts, and roundtable discussions on science
- \* Was founded by composer Gian Carlo Menotti in 1958
- \* Is now orchestrated by the Italian Ministry of Cultural Affairs
- \* In 1977, Menotti and others wanted to create an American counterpart to the festival and selected Charleston, SC as it has Spoleto's charm
- \* Roughly 72,000 people attend the festival in Charleston
- \* Attendees are mostly from South Carolina; are age 54+, highly educated, and married; and have household incomes of \$130,000+



## TomorrowLand

- \* TomorrowLand is the largest annual electronic music festival in the world
- \* Takes place in Belgium and is produced by ID&T
- \* Recently expanded to Itu, Brazil and Atlanta, GA (TomorrowWorld)
- \* This 3 day festival began in 2005 and is a music festival with a futuristic and whimsical setting
- \* Provides camping/lodging accommodations by the festival site called Dreamville
- \* Have travel packages via train and airplane called Global Journey to make traveling for international visitors easier
- \* Over 400,000 people attend TomorrowLand from 70 different countries
- \* Attendees are mostly Millennials



## Package pre-existing events into a larger festival

- \* **What:** Building off of Scottsdale's current inventory of festivals and events, package a number of happenings together, creating one to two months of non-stop activity.
- \* **Why:** An active calendar that is full of well-regarded festivals/events creates an impression that something is always happening in Scottsdale. This sort of scheduling allows visitors to plan a weekend trip on a whim and trust that they will be able to attend a concert, auction, sports event, etc.





## New Orleans Jazz & Heritage Festival | New Orleans, LA

- \* A 10-day festival that showcases musicians of all genres, cooks, and artisans from around the region and world
- \* Before Jazz Fest, New Orleans had “New Orleans Jazz Festivals,” that were produced by different organizations in the 1960s; they came together to produce the first Jazz Fest in 1970
- \* Jazz Fest is owned by the nonprofit New Orleans Jazz & Heritage Foundation, which contracts with Quint Davis’ Festival Productions, Inc. and AEG Live to produce it
- \* Roughly 650,000 people attend
- \* Attendees range from children to adults



## Memphis in May | Memphis, TN

- \* A month-long festival that is split into four main events: The Beale Street Music Festival, International Week, The World Championship Barbecue Cooking Contest, and the Sunset Symphony
- \* Began in 1977 and was produced by the Memphis Area Chamber of Commerce as a promotional umbrella for other events
- \* In 1976, the Memphis in May International Festival was born and now produces the festival every year
- \* Over 200,000 people attend, contributing roughly \$70 million in economic impact
- \* All of the four events attract diverse audiences



## Grow or develop an event into a destination event

- \* **What:** Through an RFP process, identify one or two events or festivals that can be cultivated into international destination events.
- \* **Why:** Research indicates that travelers are on the hunt for “authentic” experiences. In addition to having an established local following, a homegrown event like the Parada del Sol or Arizona Taco Festival would have “only in Scottsdale” appeal.



## Austin City Limits | Austin, TX

- \* Held on two consecutive three-day weekends
- \* Inspired by the PBS concert series of the same name
- \* Produced by Austin-based company C3 Presents, which also produces Lollapalooza in Chicago
- \* Established in 2003, the festival began as a one-weekend event; in 2013 the Austin City Council voted unanimously to allow ACL to expand to two consecutive weekends
- \* ACL focuses on all genres of music and has an art market on the festival grounds
- \* Creates awareness on certain charities and environmental issues
- \* Festival is family-friendly and offers activities for children



## WaterFire | Providence, RI

- \* WaterFire is a series of nearly 100 bonfires above the surface of the three rivers that pass through downtown Providence
- \* Fires illuminate nearly two-thirds of a mile of urban public spaces and parks
- \* In the 1990s, the City of Providence began holding annual First Night celebrations to draw families to its newly redeveloped waterfront
- \* After low attendance rates, the City expanded its purview to include music and performance; commissioned artist Barnaby Evans to create the series of bonfires—hence the beginning of WaterFire
- \* Festival happens throughout May to November
- \* Average attendance is around 40,000 ranging from children to adults



## Bumbershoot | Seattle, WA

- \* One of North America's largest international music and arts festival
- \* Originally known as the Mayor's Arts Festival or Festival '71, the festival rebranded itself as Bumbershoot in 1973
- \* The festival is now co-produced by One Reel and AEG Live
- \* Spanning over 3 days, Bumbershoot has a myriad of programs like live music, comedy, theatre, film, visual arts, and dance
- \* Festival has an environmental focus, offering several activities and seminars, recycling, compost, and renewable energy stations throughout the site
- \* Daytime event attendees are largely families, while nighttime event attendees tend to be Millennials and young professionals



## Create a brand new event

- \* **What:** Based on gaps in Scottsdale's festival/event inventory, create a brand new, high-profile event for the City of Scottsdale.
- \* **Why:** A new event will give the City an opportunity to redefine itself within the tourism industry and set a tone for the City's future.



## Dogwood Arts Festival | Knoxville, TN

- \* A month-long celebration in April
- \* Comprised of art exhibitions, Rhythm N' Blooms music festival, Chalk Walk, and the Market Square Arts Festival
- \* Started after author John Gunther described Knoxville as "America's ugliest city," in 1947
- \* City began a beautification campaign, planting dogwood trees around the city
- \* The first festival happened in 1961
- \* Dogwood Arts, a nonprofit organization, sponsors the annual festival
- \* The festival brings in roughly 100,000 attendees and has an economic impact of \$6.2 million





## Wondercool Festival | Copenhagen, Denmark

- \* A series of five festivals that take place in Copenhagen during the entire month of February
- \* Celebrates food, fashion, music, design, and theater
- \* Began in 2011
- \* Collaborates with Copenhagen Cooking, The Copenhagen Jazz Festival, the Danish Design Centre, Danish Architecture Centre, the Copenhagen Fashion Festival, music festival FROST, Designmuseum Denmark, and art museum Arken
- \* Wondercool Festival began after Wonderful Copenhagen, a nonprofit tourism organization, noticed the lack of events in Northern Europe in February
- \* Even though it is a relatively new festival, it has an attendance of 100,000 people
- \* They are mostly young professionals and older adults



# Designing a destination-level event

- \* Start with an idea/hook/theme and then build a series of lifestyle elements around it
  - \* For example, SxSW began as a music festival that aimed to connect Austin's musicians—who were isolated from the industry—with the rest of the world; as the event grew, it diversified to include film and technology, industries that were growing in Austin



## What criteria are important to what we recommend?

- \* We're looking for an event that might be developed using one or more of our development approaches
- \* We're looking for an event that makes sense in and for Scottsdale in terms of its heritage, climate, and demography
- \* We're looking for an off-season event that will help bring Millennials to the community
- \* We're looking for an event that might have an exclusive VIP component that will take advantage of Scottsdale's current attractiveness to VIP's



# Example #1: Country Music, Food + Drink Festival\*

- \* A festival focused on the multi-genre nature of country music and musicians
- \* Would include multiple VIP opportunities for visitors to meet artists
- \* Is good for Scottsdale because it includes components of the City's Western identity and lifestyle, but is still attractive to country's broad, contemporary fan base
- \* Programming might include artists like Miranda Lambert, Blake Shelton, Jason Aldean, Eric Church, Carrie Underwood, Hunter Hayes, Luke Bryan, Tim McGraw, and Faith Hill performing a big concert one night but hosting a tasting of Arizona wines in a gallery the next
- \* Key partners are in the entertainment and food/beverage industries
- \* Facilities would include one or two large concert venues and multiple smaller venues



\*Could focus on any genre of music.



## Example #2: The YouTube Festival\*

- \* The starting point is the idea that there could be a festival based on YouTube, or some similar modern media phenomenon, that explores the intersections of culture and technology
- \* There are big events like an Awards ceremony and a conference that looks at the emergence of the form and where it's going next, both including participation from major stars of the medium
- \* There are also components teaching the YouTube way and exhibitions of related technologies
- \* The event attracts Millennials and has potential for a large VIP component
- \* Would need a series of indoor conference, exhibit, meeting, and event facilities
- \* Makes sense in Scottsdale because of its proximity to Los Angeles and its VIP amenities
- \* Key partners are in the entertainment industry

\*Rather than YouTube, it could be iTunes, Google, iHeartRadio, Warner Music, CMA, or any other commercial music or media platform.



## Example #3: The Cool World Conference

- \* The starting point is an idea-driven conference about how to deal with climate change
- \* A high profile week of speakers, panels, and sessions with strong media participation (it is less about ringing the global warming alarm and more about funding solutions to climate change and water scarcity)
- \* Then there are other components such as trade fairs and gatherings on agriculture, recreation, and technologies helping to address challenges
- \* Could also include a music festival with big-name performers raising money for global causes
- \* There is a strong Millennial component
- \* Makes sense given climate and water issues in the Valley
- \* Key partners are likely ASU, government, agri-business, and other corporate interests
- \* Requires indoor and outdoor facilities for exhibits, speakers, conferences, trade shows, and performances



## Example #4: The Festival of the Bicycle

- \* Starts with an expanded version of the Tour de Scottsdale, with the goal of making it a pre-eminent bike race in the country
- \* Includes components about bicycles themselves (a trade fair and a parade), bike-friendly cities (a conference on legislative issues), and bike travel (another trade show)
- \* Makes sense in Scottsdale because of its natural beauty and hospitable fall weather
- \* Attracts bike enthusiasts from all over the world
- \* Key partners are relevant corporations
- \* Facility requirements include the race course and indoor/outdoor facilities for trade shows, conferences, exhibits, and entertainment



## Example #5: Outside Bounds

- \* A concept developed by the task force
- \* “Multi-disciplinary destination festival that encompasses all of downtown Scottsdale with performances, installations and innovative creations inspired by the desert landscape and [...] unique Scottsdale lifestyle.”
- \* Would use multiple venues, outdoor sites, and non-traditional spaces
- \* Plays on City’s existing reputation as an arts town
- \* Opportunity to tie into pre-existing rituals, happenings, and animations
- \* Key partners are in the international arts community





# Fundability



# Fundability

- \* Ewing Consulting, based on 30+ years of experience in the area of financial development, has preliminarily reviewed the opportunities and challenges of fundraising for each event example. The events were then ranked according to three essential elements of successful fundraising:
  1. **Appeal:** Will the reasons to support the event be viewed as compelling?
  2. **Fundraising Leadership:** Will individuals of influence and affluence agree to spearhead the fundraising initiative?
  3. **Cultivated Pool of Potential Donors:** Will high capacity individual, foundation, and corporate donors be likely to support the creation of the event by making gifts of significance?



## Fundability: country music, food + drink festival

### \* Opportunities

- \* If live music includes new *and* old country western entertainers, donors of means will take greater interest
- \* While festival could center around any music genre, focusing on country distinguishes Scottsdale as a hub of country western music
- \* Variety of events will be of interest to broad range of potential donors
- \* Will bring out Millennials en masse

### \* Challenges

- \* High capacity donors may view festival as being too similar to Celebrity Fight Night
- \* May have to include an elite country star of great fame who attracts people 58 and older



# Fundability: The YouTube festival

## \* Opportunities

- \* If sneak peek into where modern media phenomenon is headed is the focus, older donors will take an interest
- \* VIP events that allow donors to feel as though they are getting an inside look at the future will be appealing
- \* Older donors will be attracted to educational components
- \* Millennials will love it

## \* Challenges

- \* Will need to be avant-garde to interest high capacity donors
- \* Must be unique enough to capture the attention of people of means



# Fundability: the cool world conference

## \* Opportunities

- \* Presents Scottsdale as a forward-thinking City that engages in global issues
- \* Compelling case for support
- \* Represents a topic of great interest/debate among young and old
- \* Possible fundraising concert with celebrities will capture media attention and prompt support
- \* Many prospective partners will attract others

## \* Challenges

- \* Controversial subject
- \* May give rise to public disagreement if not presented from multiple perspectives



# Fundability: the festival of the bicycle

## \* Opportunities

- \* Distinguishes Scottsdale as a community where good health and fitness are priorities
- \* Pre-eminent bike race provides VIP opportunities for potential donors and select high-capacity cyclists
- \* Brings all of Scottsdale together, creating a greater sense of community
- \* Showcases all of the many desirable aspects of Scottsdale from Old Town to North Scottsdale

## \* Challenges

- \* May limit donor pool
- \* May only appeal to specific audience and donor if not inclusive of other recreational/natural opportunities



# Fundability: outside bounds

## \* Opportunities

- \* Focus on all that downtown Scottsdale has to offer (e.g. art, culture, music, food, desert landscape, etc.) will appeal
- \* Will create a greater sense of community that may be of importance to some donors
- \* Will promote existing events, rituals, and happenings, representing Scottsdale as bustling hub of community activity

## \* Challenges

- \* May not extend beyond local appeal
- \* May not have enough substance to constitute destination event
- \* Lacks a unique central focus, art may not be a big enough draw



## Fundability: preliminary ranking

- \* For discussion purposes, Ewing Consulting has rated the sample events with respect to the three essential requirements for successful fundraising.\*

Event	Appeal	Fundraising Leadership	Donor Pool
Country Music, Food + Drink Festival	High	Medium	High
The YouTube Festival	High	Medium	High
The Cool World Conference	Medium	Medium	Medium
The Festival of the Bicycle	Medium	Low	Medium
Outside Bounds	Medium	Low	Low

\*Note: Evaluations are based on the assumption that fundraising leaders and donors may extend beyond the boundaries of the City of Scottsdale. Many variables may influence these estimations.





# Evaluation Matrix



# Evaluation matrix

	Country Music, Food + Drink*	YouTube Festival*	Cool World Conference	Festival of the Bicycle	Outside Bounds
<b>Unique</b>	Mixed programming/VIP opportunities	A stand alone festival as opposed to a single program or event	Solution/problem solving driven	Uses conferences, trade shows, exhibits, etc. to connect Tempe's Tour de Fat to the Tour de Scottsdale	Location + programming
<b>Sites</b>	Use of existing venues, but lack of a large, downtown venue	Lots of entertainment + hotel event spaces	Lots of entertainment + hotel event spaces	Could largely take place outdoors	Lots of arts/entertainment spaces, both in and outdoors
<b>Ability to Fundraise</b>	Medium-High	Medium-High	Medium	Low-Medium	Low-Medium
<b>Partners</b>	Corporate, media + entertainment	Corporate, media + entertainment	Corporate, media + celebrity activists	Tour de Fat, Tour de Scottsdale, media + corporate	Corporate, media + entertainment
<b>Impact on downtown</b>	Opportunity to pull visitors into galleries + small businesses with intimate, VIP + performance events	Opportunity to pull visitors into galleries + small businesses with intimate programs + events	Opportunity to pull visitors into galleries + small businesses with intimate programs + events	Opportunity to pull visitors into galleries + small businesses with intimate programs + events	Opportunity to pull visitors into galleries + small businesses with more intimate, VIP + performance events
<b>Cost to Develop + Produce</b>	High	High	Medium-High	Low-Medium	High
<b>Cost to Sustain</b>	High	Medium-High	Medium	Low-Medium	High
<b>Scalable</b>	Yes	Yes	Yes	Yes	Yes

\*Could focus on any genre of music.

\* Could focus on any commercial music or media platform.



## Discussion

### Questions

- \* Have we fairly described the situation and opportunities for the development of destination event/festival?
- \* What additional input and information is needed?
- \* Are our recommendations in line with your sense of needs?

### Evaluating Opportunities

- \* They are not mutually exclusive.
- \* Which are most closely aligned with your mission?
- \* Which would attract financial support to the project?
- \* Which would you like to explore further within the context of our work?

