



WESTWORLD OF SCOTTSDALE 2026 STRATEGIC PLAN 2031



WESTWORLD
OF SCOTTSDALE



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SECTION 1
Introduction



SECTION 1. Introduction

The City of Scottsdale engaged Keen Independent Research LLC to guide a strategic planning process for its multipurpose event venue, WestWorld of Scottsdale (WestWorld).

Approach and Outcome

WestWorld worked with Keen Independent between January 2025 and March 2026 to develop WestWorld’s strategic plan. City leadership reviewed and provided input on initial findings and draft deliverables. WestWorld staff and longstanding event producers participated in a full-day visioning session to workshop concepts for a revised mission, as well as a new vision and to define values and strategic priorities. In a subsequent action planning workshop, staff continued an iterative revision process to WestWorld’s mission, vision and values and began developing strategic priorities and objectives.

The resulting strategic plan establishes an exciting new vision and mission; sets strategic priorities; defines measurable goals and tactics; and presents an implementation plan that will guide the work of the venue from 2026 to 2031.

Dear WestWorld Stakeholders,

On behalf of the WestWorld of Scottsdale team, I am pleased to present the WestWorld of Scottsdale Strategic Plan. This plan represents an important milestone for our organization and provides a clear, forward-looking framework to guide WestWorld’s continued evolution as one of the City of Scottsdale’s premier “windows to the world.”

WestWorld of Scottsdale is a nearly 400-acre, city-owned event campus that hosts approximately 80 equestrian and non-equestrian events each year. From globally recognized signature events such as the Barrett-Jackson Auto Auction, the Scottsdale Arabian Horse Show, and the Arizona Sun Circuit, to a wide range of community and specialty events,

WestWorld plays a vital role in advancing Scottsdale’s reputation, economic vitality, and quality of life.

The purpose of this Strategic Plan is to define WestWorld’s long-term vision, establish clear and measurable goals, and create a practical roadmap with actionable steps to achieve them. The plan is designed to ensure that resources are aligned, efforts are focused, risks are identified and mitigated, and progress can be evaluated over time. Most importantly, it connects WestWorld’s mission and vision to daily operations, enabling sustained success while positioning the facility to adapt to changing market conditions and community needs.

This effort would not have been possible without the generous support of the City of Scottsdale’s Tourism Development Commission, whose funding made this strategic planning initiative possible. We are also grateful to the Mayor and City Council for their continued leadership and support of WestWorld and its role within the broader tourism and economic development ecosystem of Scottsdale.

I would also like to extend my sincere appreciation to the WestWorld staff, event partners, community stakeholders, and city departments who contributed their time, insight, and expertise throughout this process. Their thoughtful input and collaboration were instrumental in shaping a plan that is both aspirational and grounded in operational reality.

As we move forward, this Strategic Plan will serve as a guiding document to help ensure WestWorld remains a premier event destination, a strong community asset, and a driver of economic impact for the City of Scottsdale for years to come.

*Respectfully,
Will Lofdahl
General Manager, WestWorld of Scottsdale*

SECTION 1. Introduction

Methodology

Keen Independent used the following methods in the planning process.

Community engagement. Keen Independent conducted extensive virtual and in-person stakeholder engagement. Over 600 external stakeholders, including Scottsdale residents and WestWorld event attendees, shared their perspectives as part of this process through the following channels:

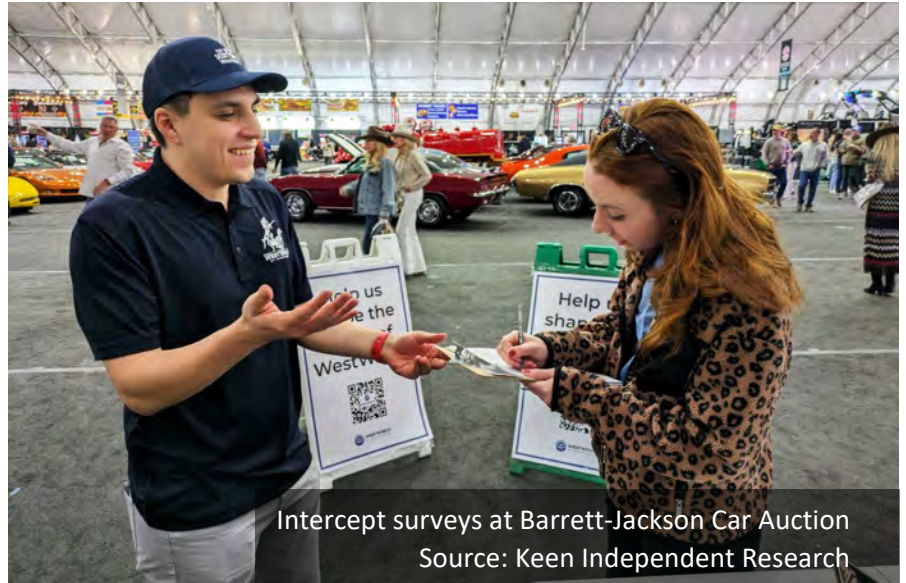
- Community input survey, including intercept surveys at WestWorld events; and
- Study hotline and email feedback.

Internal stakeholder engagement. Keen Independent gathered input from WestWorld staff, City leaders, event producers and vendors through the following methods:

- In-depth interviews and focus groups;
- Virtual input questionnaire for City staff;
- In-person full-day visioning session with WestWorld staff and event producers;
- In-person full-day action planning workshop with WestWorld staff; and
- Draft plan presentation to City Council in a work session.

Additional research. Keen Independent also:

- Analyzed WestWorld budgets, attendance and other data;
- Conducted market research including demographic analysis and population growth forecasting; and
- Benchmarked similar venues in the region and nationally.



SECTION 1. Introduction

Message from the Study Team

The strategic plan for WestWorld was made possible by City leadership and staff as well as WestWorld’s stakeholders and community members, including the diverse residents of Scottsdale and attendees of WestWorld events.

City leadership. We recognize and thank City leadership for providing support and oversight for this planning process.

Scottsdale City Council

- Lisa Borowsky, Mayor;
- Adam Kwasman, Vice Mayor;
- Barry Graham, Councilmember;
- Jan Dubauskas, Councilmember;
- Kathy Littlefield, Councilmember;
- Maryann McAllen, Councilmember; and
- Solange Whitehead, Councilmember.

Scottsdale City Leadership

- Greg Caton, City Manager; and
- Judy Doyle, Deputy City Manager.

WestWorld Leadership

- Will Lofdahl, WestWorld General Manager

WestWorld staff. WestWorld staff participated in multiple working sessions, including full-day strategic planning workshops, and helped shape this document.

Event producers. WestWorld event producers provided input through in-depth interviews and participation in a visioning session, which helped shape this document.

Community members and stakeholders. This project would not have been possible without the active participation of Scottsdale’s community members and stakeholders who took time to lend their voices and ideas in interviews, focus groups and surveys.

Study team. Keen Independent Research, www.keenindependent.com, conducted the study. Team members included:

- Alex Keen, Managing Principal; and
- Jennifer Tuchband, General Manager and Senior Consultant.



SECTION 2

Executive Summary



OUR VISION

In support of the City of
Scottsdale's vision,
WestWorld will:

Bring the modern
West to Scottsdale
as its premier
event-driven
economic engine



OUR MISSION

In support of the City of
Scottsdale's mission,
WestWorld will:

**Deliver success
to Scottsdale
with our diverse,
high-impact
equestrian and
special event
programming**





OUR VALUES

At WestWorld, we hold our staff, contractors and volunteers to a high standard. We are:

ACCOUNTABLE

Exhibit ownership, understanding, honesty and follow-through.

FLEXIBLE

Highlight adaptability in a rapidly changing event world.

COLLABORATIVE

Ensure a producer friendly environment with strong internal and external partnerships.

SERVICE ORIENTED

Demonstrate respect and thoughtfulness in all interactions with a strong commitment to success.

STEWARDS

Manage all forms of risk to guests, clients and City assets.



OUR STRATEGIC PRIORITIES 2026–2031

As we work toward our vision and fulfill our mission and values, our strategic priorities will be:

- **Compete for the best**
- **Strengthen and unify our organization**
- **Engage City and region**
- **Plan for the future**



OUR PLAN

The following pages summarize the key objectives related to each strategic priority that we will tackle over the next five years. Our implementation plan will guide us through this work. It details corresponding tactics for each objective, assigns responsibility, sets timelines and defines metrics and other indicators that will help us know if we have been successful.

Strategic Priority 1: Compete for the best

OBJECTIVES:

- Establish event profile criteria.
- Identify and pursue the best type of programming for WestWorld.
- Enhance the producer experience.
- Use facilities more efficiently and strategically.
- Address immediate maintenance and equipment upgrade needs.

Strategic Priority 2: Strengthen and unify our organization

OBJECTIVES:

- Improve consistency across all business processes.
- Improve communication throughout the customer journey.
- Build a consistent, effective training experience for all staff.
- Strengthen staff cohesion.
- Instill venue management culture.
- Evaluate and optimize staffing.
- Strengthen internal partnerships within the City.

Strategic Priority 3: Engage the City and region

OBJECTIVES:

- Tell the story of WestWorld.
- Be neighborly.
- Improve visibility and wayfinding.
- Engage internally with City stakeholders.

Strategic Priority 4: Plan for the future

OBJECTIVES:

- Strengthen long-term asset and capital planning
- Strengthen long-term business planning
- Strengthen risk management and emergency preparedness



SECTION 3
Key Issues Summary



SECTION 3. Key Issues Summary — Introduction

To identify key issues for WestWorld’s strategic planning process, the planning team analyzed:

- Market conditions, including population demographics and forecasts, geographic reach and potential competitors and collaborators (see Appendix A);
- Organizational background information, including key performance indicators (see Appendix B);
- Relevant Scottsdale City plans with potential overlap with this strategic plan (see Appendix C);
- Community feedback and perspectives gathered through a community survey, intercept surveys and online reviews (see Appendix D);
- Stakeholder perspectives gathered through interviews, group discussions and a City-wide survey (see Appendix E); and
- Benchmark case studies (see Appendix F).

Drawing on the project components above, the planning team created a working summary of strengths, weaknesses, opportunities and threats (SWOT analysis) and updated it as new findings emerged. Throughout the planning process, the SWOT analysis served as a summary of key issues to guide identification of priorities.

The table summarizing primary aspects of the SWOT analysis is provided on the next page, followed by a synthesis and description of pertinent information about each key issue.



3. Key Issues Summary — SWOT Analysis

3-1. WestWorld SWOT analysis summary

STRENGTHS

- Strong economic driver for Scottsdale and region
- Flexible facilities and amenities
- Diverse event offerings
- Ample parking
- Dedicated staff
- Cleanliness and grounds upkeep

WEAKNESSES

- Deferred maintenance and upgrades
- Unclear identity and branding
- Limited marketing visibility
- Internal and external communication gaps
- Parking operations and wayfinding
- Food and beverage restrictions
- Inconsistencies in contracts and standard operating procedures

OPPORTUNITIES

- Maximizing major multi-day events that contribute to economic impact
- Telling the story of WestWorld and build visibility
- Improving guest experience
- Strengthening organizational knowledge and capacity
- Building collaboration and trust
- Planning and risk management

THREATS

- Staff turnover and potential loss of institutional knowledge
- Restrictions around bidding, contracting, marketing and other items hindering venue processes
- Neighborhood complaints
- Inadequate future planning
- Safety, security and evolving risk for large events

Source: Keen Independent Research.

3. Key Issues Summary — Internal conditions

Internal conditions at WestWorld include staffing, events, services and physical assets. Often, internal conditions are factors that a venue has substantial control. This section describes the internal conditions that the research and planning process identified as WestWorld’s primary strengths.

STRENGTHS

- Strong economic driver for Scottsdale and region
- Flexible facilities and amenities
- Diverse event offerings
- Ample parking
- Dedicated staff
- Cleanliness and grounds upkeep

Strengths

Strong economic driver for Scottsdale and region. Community and stakeholder input consistently emphasized WestWorld’s role as a meaningful contributor to Scottsdale’s visitor economy and broader City prosperity. Participants pointed to the venue’s ability to attract destination events that generate hotel stays, visitor spending and regional visibility, while also supporting local businesses and tax revenues. A 2024 study showed that WestWorld generated approximately \$164 million in economic impact for the region that year. This economic value reinforces the importance of maintaining WestWorld’s operational readiness and reliability as a host for high-impact events and clearly communicating how major events translate into benefits for the City and region.

Flexible facilities and amenities. WestWorld’s flexible mix of indoor and outdoor spaces, equestrian-specific assets and large-format event capacity represents a core competitive advantage that supports a wide range of event types and operating models. Community members and stakeholders consistently pointed to WestWorld’s uniqueness in the region, including its ability to host large signature events as well as smaller, specialized programs, creating opportunities to optimize the campus for both economic-impact events and community-facing programming as priorities and market needs evolve.

Diverse event offerings. Community and stakeholder feedback highlighted the value of WestWorld’s balanced mix of equestrian and special events, noting that this range helps serve multiple audiences. Stakeholders emphasized that diverse programming supports resilience against market shifts and creates opportunities to refine the event mix over time, strengthening alignment with City priorities, economic impact goals and community benefits while maintaining appeal to both regional visitors and local residents.

3. Key Issues Summary — Internal conditions

Ample parking. WestWorld’s parking supply is a significant operational asset, enabling large-attendance events and supporting flexible site use during peak periods. At the same time, feedback indicates that parking is not only a capacity issue but also an experience issue, making this strength most valuable when paired with clear wayfinding, traffic flow planning, staffing and communications that help guests arrive and depart smoothly.

Dedicated staff. Stakeholders and partners frequently described WestWorld staff as committed, responsive and invested in event success, which supports long-standing client relationships and repeat business. This service-oriented culture is a key strength to build on through training, clearer processes and internal coordination so that these efforts are reinforced by consistent standards and tools rather than relying solely on individual knowledge or workarounds.

Cleanliness and grounds maintenance. Community and stakeholder feedback consistently cited cleanliness and well-maintained grounds as important contributors to positive first impressions and overall event-day experiences at WestWorld. Participants noted that visible upkeep signals professionalism, care for City assets and respect for guests and producers. Maintaining this standard is important to protecting and enhancing WestWorld’s reputation.



3. Key Issues Summary — Internal conditions

Next, we describe internal conditions that the planning process identified as weaknesses.

WEAKNESSES

- Deferred maintenance and upgrades
- Unclear identity and branding
- Limited marketing visibility
- Internal and external communication gaps
- Parking operations and wayfinding
- Food and beverage restrictions
- Inconsistencies in contracts and standard operating procedures

Weaknesses

Deferred maintenance and upgrades. Deferred maintenance and limited investment in upgrades can reduce efficiency, increase event-day friction and weaken WestWorld’s competitiveness over time. Stakeholders described needs tied to functionality and experience (e.g., footing, technology, dust control, drainage, ADA access and other infrastructure), suggesting that near-term prioritization of “high-impact fixes” alongside a longer-term capital plan will be important for protecting existing signature events and attracting new opportunities.

Unclear identity and branding. WestWorld’s identity and year-round value are not always well understood across audiences, which can dilute its market position and community connection. Community and stakeholder input suggests that many people primarily associate WestWorld with a small number of major events (e.g., Barrett-Jackson and Arabian Horse Show) and may be unaware of the breadth and quality of programming hosted throughout the year. A clearer, more consistent identity paired with messaging that highlights the full calendar, the variety of events and the venue’s role for both visitors and residents could help build stronger awareness and understanding among community members and stakeholders.

Limited marketing visibility. Stakeholders noted that marketing is especially important for improving regional participation beyond signature events, strengthening the venue’s brand presence year-round and helping residents understand what is happening on site, when it is happening and why it matters to the City.

3. Key Issues Summary — Internal conditions

Internal and external communication gaps. Communication challenges can create avoidable inefficiencies and inconsistent experiences. Stakeholders pointed to issues such as handoffs, timelines, clarity of responsibilities and event-day coordination. Addressing these gaps through standardized processes, shared tools and clear points of contact could improve producer confidence, staff effectiveness and overall reliability.

Parking operations and wayfinding. Even with ample parking, operational and wayfinding challenges can negatively shape first impressions and guest satisfaction, especially at large events. Community and stakeholder feedback indicates that signage, traffic flow, entry and exit management and on-site navigation can be improved. Implementing consistent wayfinding strategies and scalable parking operations plans could support accessibility and help deliver a more predictable experience across event types.

Food and beverage restrictions. Constraints related to food and beverage offerings can limit flexibility for event producers and affect guest satisfaction. Stakeholders also noted a structural challenge in which the contracted food and beverage vendor may have difficulty generating sufficient revenue at smaller events but remain obligated to provide service, which creates tension among service expectations, financial feasibility and event needs. Clarifying policies and exploring adaptable approaches (e.g., scaled service models, pre-set minimums or alternative options for small events where allowable) could enhance the overall event experience while supporting sustainable operations for both WestWorld and its food and beverage vendor.

Inconsistencies in contracts and standard operating procedures. Inconsistent contracts and standard operating procedures can increase uncertainty for producers, slow internal workflows and make outcomes dependent on individual staff knowledge. Stakeholders described needs for streamlined and transparent processes that reduce avoidable steps and clarify requirements. Strengthening standard operating procedures and contract consistency could support operational efficiency and improve risk management.



3. Key Issues Summary — Strategic implications

Strategic implications translate what we learned from internal and external conditions into what WestWorld should do next. This section highlights the most consequential takeaways, including where WestWorld has clear leverage to improve performance or expand impact, where risks require mitigation and where choices or tradeoffs will matter most. Rather than restating findings, these implications frame opportunities for actionable direction for priorities, objectives and decisions.

OPPORTUNITIES

- Maximizing major multi-day events that contribute to economic impact
- Telling the story of WestWorld and build visibility
- Improving guest experience
- Strengthening organizational knowledge and capacity
- Building collaboration and trust
- Planning and risk management

Opportunities

Maximizing major multi-day events that contribute to economic impact. WestWorld has an opportunity to strengthen its role as an event-driven economic engine by intentionally prioritizing best-fit, multi-day events that align with City goals and the venue’s operational capacity. Clarifying event profile criteria, such as anticipated hotel nights, visitor spending, seasonal fit, campus footprint, community compatibility and operational complexity, can help focus sales efforts on the highest-value opportunities and set clear expectations for producers.

Pairing these priorities with efficient booking and delivery processes is critical. Clear pricing and fee structures, standardized contracts, predictable planning timelines and consistent service levels can improve producer confidence. Aligning near-term facility improvements and operational readiness with the needs of high-impact events will help protect existing signature events while strengthening the pipeline for future, best-fit bookings.

Telling the story of WestWorld and build visibility. Community and stakeholder feedback suggests that WestWorld’s role, value and range of offerings are not always well understood, particularly outside major events like Barret-Jackson and the Arabian Horse Show. Clarifying and consistently communicating WestWorld’s identity as both an economic driver and a community asset can strengthen market positioning and align expectations among residents, partners and producers.

Improved visibility through coordinated branding, promotion and public-facing communications can expand regional awareness, improve attendance for smaller events and reinforce WestWorld’s contribution to City objectives. Over time, a clearer narrative can also reduce confusion that contributes to neighborhood concerns and build broader support for WestWorld’s programming and investments.

3. Key Issues Summary — Strategic implications

Improving guest experience. Targeted improvements to the guest experience offer a practical opportunity to increase satisfaction and enhance overall event success. Feedback consistently points to first- and last-touch moments (e.g. arrival, parking, wayfinding, accessibility and comfort) as areas where changes can have a significant impact across event types.

This opportunity includes strengthening traffic and parking operations, improving wayfinding and signage, ensuring consistent event-day communications and addressing high-impact facility needs such as technology readiness and basic infrastructure. A more predictable and welcoming guest experience also supports producer outcomes and helps differentiate WestWorld in a competitive regional venue market, reinforcing its reputation as a reliable host for high-impact events.

Strengthening organizational knowledge and capacity. WestWorld can reduce vulnerability to turnover and improve consistency by investing in standardized training, documentation and clear operating procedures that support a shared venue management culture. This opportunity is closely tied to producer-friendliness. Clear internal handoffs between sales and operations, defined roles and responsibilities and standard planning tools can improve efficiency and create a more reliable experience for both staff and producers, which can contribute to building long-term trust.

Building collaboration and trust. WestWorld's success depends on effective collaboration with many City entities, operating partners and community stakeholders. Stronger internal alignment across City partners can improve coordination around staffing, safety and capital planning.

Externally, proactive and consistent engagement with producers and neighbors can build trust, reduce conflict and support more predictable event planning. Collaboration also creates opportunities to align programming with City priorities related to economic impact, community benefit and quality of life.

Planning and risk management. Integrating business planning, asset and capital planning and risk management provides an opportunity to support safe, predictable and cost-effective event delivery. As expectations for safety, security and emergency readiness continue to rise, scalable standards and clear protocols become increasingly important to maintain trust among producers, guests, residents and the City.

This opportunity includes clarifying roles and responsibilities, standardizing planning requirements based on event size and complexity, strengthening coordination with public safety partners and improving documentation and training. Proactive risk management can reduce last-minute costs and uncertainty, protect people and City assets and enable WestWorld to continue to confidently host high-profile and complex events.

3. Key Issues Summary — External conditions

External conditions describe the forces and trends that shape WestWorld’s operating environment but are largely outside its direct control. These include market demand, competition, demographic and tourism dynamics, regulatory and policy context, regional development patterns and broader economic conditions. While WestWorld cannot “manage” these factors in the same way it manages internal operations, understanding them is essential for anticipating change, identifying constraints and calibrating where to lean in or adjust strategy.

The planning team describes factors that the planning process identified as key threats.

THREATS

- Staff turnover and potential loss of institutional knowledge
- Government restrictions around the contract process, marketing and other items hindering venue processes
- Resident complaints
- Inadequate planning
- Safety, security and evolving risk for large events

Threats

Staff turnover and potential loss of institutional knowledge.

Turnover can disrupt continuity and weaken operational consistency, particularly in specialized venue functions. Without strong documentation and cross-training, institutional knowledge may be difficult to retain or replace.

In addition, WestWorld is currently experiencing a relatively high turnover rate among operations staff, which has immediate implications for event delivery, training demands and workload distribution. A clear driver described in staff feedback is misalignment between role expectations and the reality of the job. This mismatch can contribute to early departures and recurring vacancy cycles. Frequent onboarding of new staff can strain supervisors and reduce consistency in event execution, particularly during peak event periods. Clarifying and modernizing job descriptions and titles and providing realistic job previews during hiring and onboarding are practical steps to better align expectations and improve retention.

Government restrictions around the contract process, marketing and other items hindering venue processes. Stakeholders described several ways that City and regulatory requirements can constrain WestWorld’s flexibility and competitiveness relative to other competing venues. These constraints are primarily related to ordinances, land-use rules and administrative requirements that shape what is feasible, how quickly decisions can be made and how easily producers can plan, price and promote events.

Specific constraints raised through stakeholder input include signage ordinance limitations that affect on-site and off-site wayfinding and visibility, restrictions on collecting sponsorships associated with facilities located on federal land and restrictions on providing incentives to attract large, high-impact events.

3. Key Issues Summary — External conditions

Resident complaints. Although WestWorld predates much of the nearby residential development, stakeholders reported recurring complaints about noise, lights and the venue’s aesthetic. Stakeholders expressed concern that continued community growth could increase scrutiny and make future development or operational changes more challenging. Proactive neighbor engagement, clear communications and practical mitigation measures will be important to maintain community support and minimize potential constraints on programming.

Inadequate planning. If planning and prioritization are not sufficiently aligned to venue needs, WestWorld could face a heightened risk of reactive decision-making that increases costs and slows progress over time. Stakeholders noted that planning processes can become barriers when key stakeholders are not consistently engaged, when the most critical upgrades are not clearly prioritized or when timelines extend long enough that priorities shift with changes in City leadership. Over time, these dynamics could delay necessary improvements, reduce producer confidence and weaken long-term competitiveness.

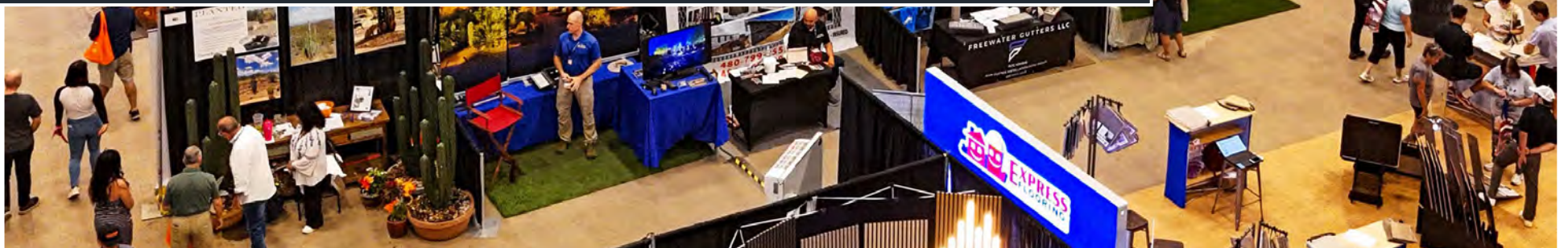
Safety, security and evolving risk for large events. Expectations for safety and security continue to rise, with reputational and operational implications. Failure to proactively anticipate and manage these risks can undermine trust among producers, guests and the City.

Community and stakeholder feedback suggests that risk is not limited to rare incidents. It also includes day-to-day readiness for large crowds, traffic and parking management, heat and weather exposure, emergency access and clear coordination among venue staff, contractors and public safety partners. Strengthening scalable safety and security planning can reduce uncertainty, control costs and reinforce confidence among guests, residents and event producers.





SECTION 4 Implementation Plan



SECTION 4. Implementation Plan

The implementation plan matrices in this section offer a roadmap for action on strategic priorities, including assigned leadership, timelines and potential metrics or other indicators of success.

Oversight, Monitoring and Evaluation

Implementation of the WestWorld strategic plan will not happen overnight. As reflected in the following matrices, work has already begun on some priorities and tactics, but progress toward strategic priorities will require consistent focus over time. These efforts will benefit from systematic approaches that operationalize the venue's action plan as a part of its regular activities such as standing meeting agendas, performance management and communication updates.

Maintaining the implementation plan over time.

The implementation plan reflects the best forecasts of WestWorld staff based on information available at the time of this report in early 2026. In any such multi-year plan, changes arising from new information and evolving circumstances should be expected. To keep the plan relevant, WestWorld should:

- Treat the plan as a living, working document, adapting it to new information or circumstances when needed;
- Use the implementation tools as described in Appendix G regularly to note progress, status and comments;
- When timelines, assigned leads, priority levels, metrics or other details require substantial alterations, edit the team's working version of the plan accordingly; and
- Monitor timelines closely and expect some to shift as conditions evolve.

Assign responsibility for each tactic outlined in the strategic plan to an identified champion.

- Outline the expectations for each champion to “take point” on monitoring and reporting progress; convening and organizing actions; and identifying and resolving or elevating roadblocks.
- Embed strategic plan progress reviews and reporting into regular meeting agendas, including leadership, all-staff and one-on-one check-ins with staff.
- Integrate strategic plan implementation efforts into internal and external communications to sustain interest and momentum by sharing stories about “quick wins” and progress towards longer-term aspirations.
- Use and refine measurable goals for key indicators tied to strategic priorities and share these internally and externally in a digestible format (see the sample dashboard in Appendix G).
- The implementation matrices in this section suggest preliminary metrics and indicators for each tactic. Once data collection and reporting on measurable indicators are in place, consider distinguishing between baseline goals and aspirational targets or “stretch goals.”
- Establish and implement a regular cadence of comprehensive strategic plan progress reports for internal and external stakeholders.
- Conduct a mid-point review to update objectives, tactics and timelines as necessary.
- Begin strategic planning for 2031–2035 by December 2029.

SECTION 4. Implementation Plan — Priority 1. Compete for the best

| PRIORITY ONE (1 of 2) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|--|-----------------|--|---------------|-------------|--|
| 1. Compete for the best | | | | | |
| 1-1. Establish event profile criteria | | | | | |
| a. Define clear, measurable criteria for evaluating and prioritizing events based on the City's priorities | General Manager | City Council, City Manager, Deputy City Manager, Sales | Mar-26 | Oct-26 | A City leadership-approved priority list for all events booked at WestWorld (e.g., Priority 1: Economic impact, Priority 2: Potential for cost recovery, Priority 3: Community Enrichment.) |
| b. Develop a tiered booking schedule with priority windows that reflect the agreed-upon event profile | General Manager | Sales | Oct-26 | Mar-27 | Compare new events booked to criteria outlined in 1-1a |
| c. Review all existing events to assess alignment with the new criteria and identify potential adjustments* | General Manager | Sales, City Manager's Office, Deputy City Manager | Mar-27 | Jun-27 | All events on schedule reviewed and categorized by priority level. Recommended adjustments for future bookings documented. |
| 1-2. Identify and pursue the best type of programming for WestWorld | | | | | |
| a. Target client acquisition based on WestWorld's strengths and assets* | Sales | Tourism Development Commission, M Culinary | Jul-27 | Jun-28 | List of prospective priority producers/clients created, 10 outreach efforts to prospective priority producers per year, with the objective of securing 2 new events per year. Given the finite amount of availability, we will prioritize events with the highest value utilizing the new objectives. Lower tiered priority events will be moved to less desirable dates and less utilized rental space or will not be renewed for the following year. Each year, the bottom 10% of events based on booking priority will be replace within 24 months assuming that more attractive events can be secured. |
| b. Assess and reorganize the event calendar as needed to free up dates, improve sequencing and accommodate high-priority new events* | Sales | WestWorld Leadership, Senior Director | Jul-27 | Jun-28 | Adherence to the modified booking priorities outlined in 1-1a will be the metric used to access success of this deliverable |
| c. Establish a vetting process to evaluate prospective producers based on experience, quality, financial stability and alignment with WestWorld's priorities | Sales | WestWorld Leadership | Jul-27 | Jun-28 | Vetting checklist created and applied to 100% of new producer inquiries |

Note: Implementation plan details, including start by and end by dates, are subject to change.

*Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 1. Compete for the best

| PRIORITY ONE (2 of 2) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|--|---------------------------|---|---------------|-------------|--|
| 1-3. Enhance the producer experience | | | | | |
| a. Streamline event contracts to improve clarity, efficiency and turnaround time | Contract Coordinator | Administration, Legal, Purchasing | Jul-26 | Jun-27 | Updated contract templates launched. Average contract delivery in a reasonable amount of time, within five days of receiving all pertinent information |
| b. Strengthen client relations through consistent communication and responsive support | Director | Westworld Leadership, Facility Managers | Mar-26 | Mar-27 | All client satisfaction ratings at a 4 or higher on a 5-point scale |
| c. Reevaluate the food and beverage commission model to ensure it supports caterer viability and provides fair, high-quality options for producers | Assistant General Manager | WestWorld Leadership, M Culinary | Mar-26 | Mar-27 | All satisfaction ratings regarding F&B cost and quality at a 4 or higher on a 5-point scale |
| 1-4. Use facilities more efficiently and strategically | | | | | |
| a. Cluster similar events to improve changeover efficiency | Sales | Facilities Managers | Mar-28 | Jun-31 | Reduce overtime during changeovers by 5% |
| 1-5. Address immediate maintenance and equipment upgrade needs | | | | | |
| a. Complete priority maintenance and implement necessary upgrades* | Facilities Manager | Maintenance Workers | Jan-29 | Dec-29 | The length of time that it takes to complete each project is within estimates determined during the planning process |
| b. Upgrade the PA system to improve sound quality and reliability for events* | Facilities Manager | Maintenance Workers | Dec-25 | Feb-26 | PA system installed by target date |

Note: Implementation plan details, including start by and end by dates, are subject to change.
 *Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 2. Strengthen and unify our organization

| PRIORITY TWO (1 of 3) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators | |
|---|--|---------------------|--|-------------|-------------------------------------|--|
| 2. Strengthen and unify our organization | | | | | | |
| 2-1. Improve consistency and standardization across all business processes | | | | | | |
| a. | Standardize policies and operational procedures to ensure consistent practices across the organization | General Manager | WestWorld Leadership | Jul-26 | Jun-28 | Policy and operational policy needs inventoried and prioritized. Then 100% of policy and operational procedure priorities completed and adopted |
| b. | Provide training and communication to ensure all staff follow unified processes and expectations | General Manager | WestWorld Leadership | Jul-27 | Jun-29 | 100% of staff trained on unified processes. All staff compliant with processes |
| c. | Improve the RV reservation system to enhance usability and client experience* | RV Office Lead | Facility Mangers, IT Staff | Apr-26 | Apr-26 | Track the number of instances in which RV staff were needed to step in and provide customer assistance when the system was not successful at competing the reservation process |
| 2-2. Improve communication throughout the customer journey, from sales to service delivery and follow up | | | | | | |
| a. | Strengthen communication workflows to ensure timely, accurate information sharing among staff and with clients | Director | Facilities Manager, Sales, Event Staff | Mar-26 | Jun-27 | Communication protocol adopted |
| b. | Hold regular production meetings to align teams and address operational needs in advance | Director | Facilities Managers | Mar-26 | Jun-31 | Develop a system to determine which events will require pre-event production meetings and in-turn ensure that the meetings take place |
| 2-3. Build a consistent, effective training experience for all staff | | | | | | |
| a. | Create a structured onboarding and training program for all operational staff | Facilities Managers | WestWorld Leadership | Mar-26 | Sep-26 | Training program is established and documented. All new hires complete this training program within 60 days of start date |
| b. | Provide ongoing role-specific training to maintain consistency and build expertise | General Manager | WestWorld Leadership | Jul-26 | Jun-31 | Identify recommended monthly/hourly training hours per employee by role or type of position. All staff complete required training |

Note: Implementation plan details, including start by and end by dates, are subject to change.
 *Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 2. Strengthen and unify our organization

| PRIORITY TWO (2 of 3) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|---|-------------------|---|---------------|-------------|---|
| 2-4. Strengthen staff cohesion | | | | | |
| a. Increase employee engagement to build a more connected and collaborative team | General Manager | WestWorld Leadership | Jul-27 | Jun-31 | 100% of employees participating in engagement activities. Each employee to participate in three activities each year |
| b. Leverage staff from other departments during surge periods to support operations | Facility Managers | WestWorld Leadership and Other City Departments | Mar-26 | Mar-27 | 10% reduction in overtime over base year |
| c. Enhance internal customer service to improve collaboration and mutual support across teams | General Manager | WestWorld Leadership | Mar-26 | Jul-27 | Average employee satisfaction rating of 4 or higher (on a 5 point scale) |
| 2-5. Instill venue management culture | | | | | |
| a. Expand professional development opportunities to build staff expertise in venue management* | General Manager | Deputy City Manager | Mar-26 | Jun-31 | At least one employee attains venue management credentials. All staff attend at least one professional development opportunity annually, when budget and time allow |
| b. Clarify and update job titles to align with industry standards and responsibilities | General Manager | Human Resources | Mar-26 | Jun-27 | Updated titles approved and in line with venue industry standards |
| c. Encourage staff participation in regional and national venue industry networks* | General Manager | Deputy City Manager and HR Department | Mar-26 | Jun-29 | At least one employee attains venue management credentials. All staff attend at least one professional development opportunity annually, when budget and time allow |
| d. Ensure staff understand how their roles contribute to WestWorld's overall mission and operations | General Manager | Department Heads | Mar-26 | Sep-26 | Onboarding and training includes how positions fit within the bigger picture (see objective 2-3 above) |

Note: Implementation plan details, including start by and end by dates, are subject to change.

*Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 2. Strengthen and unify our organization

| PRIORITY TWO (3 of 3) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|--|--|------------------------------------|---------------|-------------|---|
| 2-6. Evaluate and optimize staffing | | | | | |
| a. Assess current staffing levels and roles to identify gaps, redundancies and future needs | General Manager, Assistant General Manager | Deputy City Manager, HR Department | Jul-27 | Jun-28 | Professional staffing consultant assessment completed and implemented |
| 2-7. Strengthen internal partnerships within the City | | | | | |
| a. Improve coordination with City departments to clarify service requirements in advance of each event | Director | Facilities Manager | Mar-26 | Jun-31 | Ensure all events have pre-event coordination communications or meeting with all relevant departments |

Note: Implementation plan details, including start by and end by dates, are subject to change.
 *Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 3. Engage the City and region

| PRIORITY THREE (1 of 2) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|--|---------------------------|------------------------------|---------------|-------------|---|
| 3. Engage the City and region | | | | | |
| 3-1. Tell the story of WestWorld | | | | | |
| a. Provide quarterly updates to City Council to share accomplishments and upcoming priorities | General Manager | Management Analyst, Sales | Mar-26 | Jul-31 | Quarterly updates presented at City Council meetings |
| b. Develop and maintain coordinated public communications, including newsletters, email blasts and event calendars | Sale Team | Management Team | Jul-26 | Jun-31 | Monthly newsletter and email blasts sent and open/rates documented. Event calendar is updated as events are added to or dropped off the calendar |
| c. Improve on-site signage to enhance wayfinding and increase visibility of current and upcoming events* | Assistant General Manager | Director, Facilities Manager | Jan-28 | Dec-29 | Digital signage installed throughout WestWorld |
| d. Strengthen cross-promotion with City departments and regional partners to broaden event exposure | Sales | City Communications | Mar-26 | Jun-31 | Increased number of cross promotions completed with a goal of two per year |
| e. Develop a marketing plan | Sales | WestWorld Leadership | Mar-26 | Mar-27 | A marketing plan that outlines market research, target audience, marketing strategies and performance metrics completed |
| 3-2. Be neighborly | | | | | |
| a. Notify nearby neighborhoods about events that may cause inconveniences such as noise or traffic | Assistant General Manager | Sales | Mar-26 | Jun-31 | Establish regular communications cadence to improve neighbor relations (at least once per quarter) and an ad hoc notification process for higher impact events to reduce complaints |

Note: Implementation plan details, including start by and end by dates, are subject to change.

*Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 3. Engage the City and region

| PRIORITY THREE (2 of 2) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|--|---------------------------|------------------------------|---------------|-------------|--|
| 3-3. Improve visibility and wayfinding | | | | | |
| a. Evaluate key entry points, pathways and road-facing areas to identify wayfinding needs and opportunities to increase drive-by visibility* | Assistant General Manager | Director | Jul-26 | Jul-27 | Evaluation of wayfinding needs and opportunities documented |
| b. Add clear, consistent signage to enhance visibility and help visitors navigate to the property* | Assistant General Manager | Director, Facility Manager | Jul-27 | Dec-29 | Signage improvements recommended in Tactic 3-3-a are implemented |
| 3-4. Engage internally with City stakeholders | | | | | |
| a. Leverage Scottsdale Insider and other City channels to share WestWorld updates and opportunities | Sales | Tourism, City Communications | Jul-26 | Jun-27 | WestWorld updates and opportunities shared with all City staff monthly |
| b. Develop a staff shadowing program for WestWorld staff to build understanding of WestWorld operations | Assistant General Manager | Director, Facilities Manager | Jul-27 | Jun-31 | 10 shadowing experiences to take place annually |
| c. Offer WestWorld facilities as meeting space for City departments when available | Sales | WestWorld Leadership | Jul-27 | Jun-31 | Allow City meetings to be hosted with the goal of 5 per year |

Note: Implementation plan details, including start by and end by dates, are subject to change.

*Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 4. Plan for the future

| PRIORITY FOUR (1 of 2) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|--|----------------------------|--|---------------|-------------|---|
| 4. Plan for the future | | | | | |
| 4-1. Strengthen long-term asset and capital planning | | | | | |
| a. Complete an infrastructure master plan* | General Manager | All Departments, Producers | Dec-26 | Dec-27 | Master plan completed and formally adopted |
| b. Complete a capital improvement plan* | Assistant General Manager | WestWorld Leadership, Administration | Jul-26 | Jun-29 | Capital improvement plan completed. Priority projects identified and preliminary estimated budget for priority projects identified |
| c. Complete an asset management plan* | Assistant General Manager | WestWorld Leadership, Administration | Jul-26 | Jun-27 | Asset management plan complete with asset inventory and lifecycle data. Plan is formally adopted |
| d. Explore other uses and opportunities for WestWorld infrastructure | General Manager | WestWorld Leadership, Administration | Jul-26 | Jun-29 | Additional infrastructure investments such as conference center, hotel, etc. are explored with City Leadership and incorporated into the infrastructure master plan and capital improvement plans |
| 4-2. Strengthen long-term business planning | | | | | |
| a. Complete a business continuity plan | General Manager | Director, Contracts Coordinator | Feb-26 | Dec-26 | Business continuity plan completed and updated annually |
| a. Complete a staffing and succession plan | General Manager | WestWorld Leadership | Jul-26 | Jun-27 | Staffing and succession plan completed |
| b. Evaluate rates and fees structure | Work with Keen Independent | WestWorld Leadership | Jul-25 | Apr-26 | Rates review completed and proposed adjusted rates and approved by City leadership |
| c. Refresh the strategic plan* | General Manager | Senior Management team, Contract Coordinator | Jul-30 | Jun-31 | Strategic plan refresh completed and formally adopted |

Note: Implementation plan details, including start by and end by dates, are subject to change.
 *Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Priority 4. Plan for the future

| PRIORITY FOUR (2 of 2) | Lead role | Key collaborators | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators |
|---|---------------------------|--|---------------|-------------|--|
| 4-3. Strengthen risk management and emergency preparedness | | | | | |
| a. Conduct a comprehensive risk assessment* | General Manager | Risk, WestWorld Leadership | Jul-26 | Jul-27 | Risk assessment completed. Mitigation actions prioritized |
| b. Enhance emergency procedures plan | Assistant General Manager | City Police and Fire, Managers, Director | Jul-30 | Jun-31 | Updated emergency procedures documented and revisited annually |
| c. Provide regular safety and security training for staff | Assistant General Manager | Risk, WestWorld Leadership | Jul-26 | Jun-27 | All staff complete annual training |

Note: Implementation plan details, including start by and end by dates, are subject to change.
 *Dependent on a new resource (e.g. budget, technology, etc.)

SECTION 4. Implementation Plan — Rollout

Resource Dependences and Opportunities

WestWorld identified many tactics within its strategic plan that are dependent on additional resources, such as budget. The implementation matrices for each tactic list resource dependencies. Addressing these dependencies is crucial to ensuring WestWorld can make progress toward its priorities. As WestWorld staff activate the strategic plan, they may wish to consider the following steps:

- **Evaluate resource reallocation.** Start by inventorying existing staff time, contracted services and operating dollars currently supporting WestWorld’s highest-volume activities (event delivery, maintenance/grounds, sales/booking support, communications). Identify tasks that:
 - Are mission-critical and time-sensitive;
 - Can be paused or scaled; and
 - Could be shifted to reduce reliance on outside contractors or duplicative City processes.

Then reallocate capacity toward near-term “quick wins” that improve client experience and competitiveness while protecting the operational basics that make events successful.

- **Analyze resource gaps.** To address gaps between what WestWorld aspires to do and what its current resources allow, WestWorld will need to clearly define what is required (e.g. additional staff, budget, technology, etc.). Other resource gaps may need to be assessed in tandem with or after consideration of broader resource allocation decisions.



Equestrian events at WestWorld
Source: WestWorld of Scottsdale

SECTION 4. Implementation Plan — Rollout

- Examine value of events to bottom line and local economy.** As an economic driver, it is crucial that WestWorld maximize its resource utilization to enhance impact. WestWorld leadership should consider implementing policies related to event economic impact and applying booking advantages to events that generate the greatest level of new outside spending for Scottsdale and the region.
- Pursue opportunities to increase funding from sources outside the City.** Frame external funding not as a request for discretionary support, but as a justified investment that reflects WestWorld’s demonstrated economic, tourism and fiscal contributions at the local, regional and state levels. Emphasize WestWorld’s role in generating visitor spending, tax revenues and statewide visibility and position County and State participation as ways to sustain and amplify these benefits. Advocacy efforts should clearly articulate the return on investment and align WestWorld priorities with broader County and State goals related to tourism promotion, economic development and major-event attraction.
- Plan for upcoming replacement costs.** As a large, heavily used public assembly venue, WestWorld faces predictable lifecycle replacement needs for infrastructure, building systems, event-related equipment and technology. When these costs are not anticipated and planned for, replacements are more likely to be deferred, funded reactively or compete with other City priorities. Proactive planning for replacements can reduce operational disruptions, smooth budget impacts over time and provide clearer justification for shared investment and funding advocacy.

4-1. Ratios of the number of economic impact dollars per dollar subsidized at other public assembly venues compared to WestWorld of Scottsdale

| | | Study year | Estimated subsidy or contributions (in millions) | Estimated economic impact (in millions) | Ratio |
|---|-----------------------|-------------|--|---|-------------|
| Events DC | Washington DC | 2024 | \$ 121.0 | \$ 11,400 | \$ 94.2 |
| Orange County Convention Center | Orlando, FL | 2024 | 62.8 | 3,900 | 62.1 |
| Central States Fairgrounds | Rapid City, SD | 2022 | 1.3 | 69 | 53.4 |
| McCormick Place Convention Center | Chicago, IL | 2024 | 53.5 * | 2,240 | 41.9 |
| Georgia World Congress Center Authority | Atlanta, GA | 2025 | 48.9 | 1,940 | 39.6 |
| WestWorld of Scottsdale | Scottsdale, AZ | 2024 | 4.2 | 163 | 38.8 |
| Will Rogers Memorial Center | Fort Worth, TX | 2024 | 6.0 * | 217 | 36.2 |
| Massachusetts Convention Center Authority | Boston, MA | 2022 | 44.9 | 870 | 19.4 |
| Phoenix Convention Center | Phoenix, AZ | 2024 | 48.0 | 840 | 17.5 |
| Credit Union of Texas Event Center | Allen, TX | 2024 | 2.0 | 11 | 5.5 |

Note: *Debt service not explicitly included. Unclear whether loss includes debt service. Impact data are pulled from a variety of sources, including published impact studies and statements made by the venue’s governing body. Keen Independent cannot guarantee the accuracy of impact estimates beyond publicly presented data. Subsidy and contributions are determined by net income (loss), which include operating and non-operating expenses, as indicated on publicly available financial documents. Accounting practices can vary by venue, which can affect the ratio illustrated in this table.

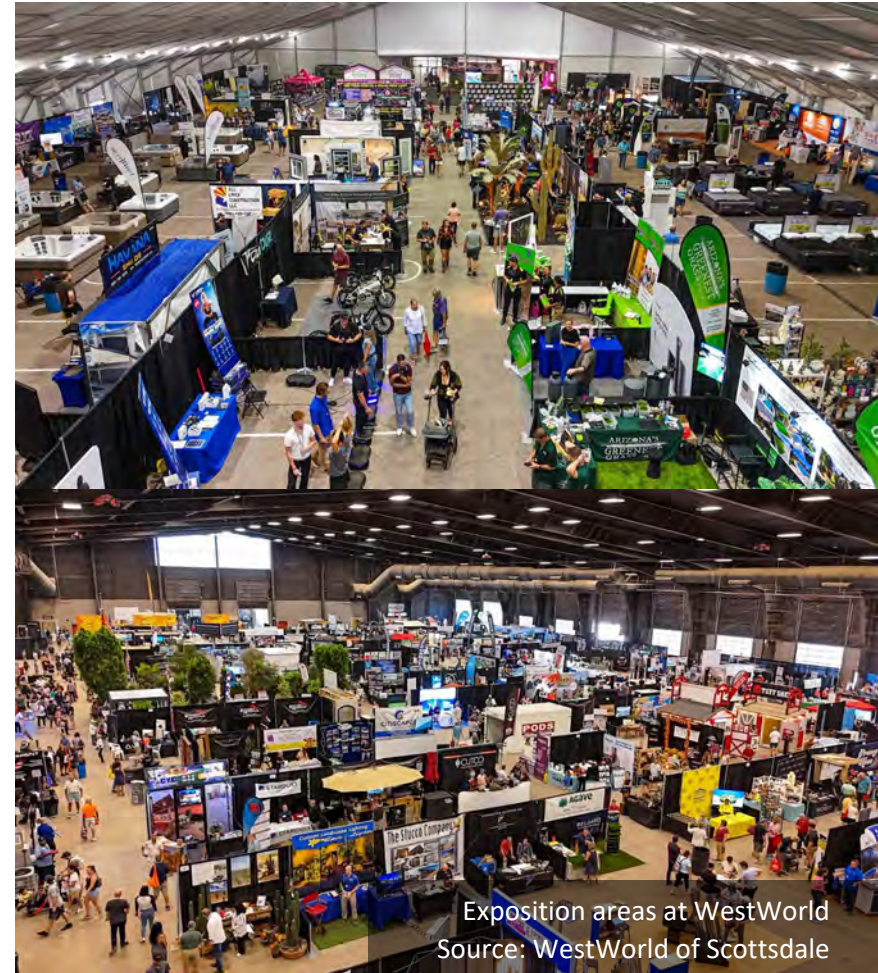
Source: Keen Independent Research.

SECTION 4. Implementation Plan — Rollout

- **Explore alternative governance models.** City of Scottsdale staff who work at WestWorld struggle with the reality that if a client disagrees with an operational decision, the client can bypass staff and appeal directly to City elected officials and leadership to apply pressure. This challenge is not unique to WestWorld and is seen across the country in municipally owned and operated venues. It can be challenging for all involved if it is unclear who ultimately makes decisions for the success of the venue. Stakeholders emphasized the need for a more consistent, knowledgeable City decision-making structure that preserves institutional understanding of the venue. An updated structure could provide a clear and informed point of accountability for operational, strategic and community concerns, while maintaining appropriate public oversight and transparency.

Some Cities have chosen to appoint boards or commissions to oversee venue operations. These boards can include representation from a variety of sources, including individuals with expertise in venue operations and economic development. The City of Scottsdale could consider this option for WestWorld to ensure accountability and to reduce City leadership intervention in day-to-day operations.

- **Adjust tactics timeline if resource dependences are unresolved.** If key resource needs are not resolved on the expected schedule, update “start by/end by” dates accordingly, clarify interim milestones so momentum continues and communicate changes transparently in regular progress reporting so stakeholders understand what is moving forward now versus later.





SECTION 5
Appendices

SECTION 5. Appendices

The following supporting appendices document the research and analyses that inform and support WestWorld’s strategic plan.

Market Analysis

Appendix A includes an assessment of WestWorld’s market position within the broader special events and equestrian landscape. It lays out the market areas used for analysis, reviews population and demand indicators, inventories comparable venues and benchmarks rental rates to understand WestWorld’s competitive positioning.

Key Performance Indicators (KPIs)

Appendix B compiles baseline KPIs and supporting data for tracking WestWorld performance over time. It summarizes multi-year operating results and explains key economic impact metrics drawn from a 2024 economic impact study.

Relevant Plans

Appendix C summarizes City of Scottsdale plans and documents that include or affect initiatives related to WestWorld and events hosted there. The intent is to show how WestWorld’s future direction can align with the broader City vision and community priorities reflected in adopted plans (e.g., General Plan, Tourism & Events Strategic Plan and the City’s Organization Strategic Plan).

Community Feedback

Appendix D provides the quantitative and qualitative findings from community outreach, including survey promotion and distribution, participation levels, key themes and supporting visuals. It includes demographic and interest profiles to contextualize results, helping the project team understand whose voices are represented and where perceptions are strongest.

User and Key Stakeholder Feedback

Appendix E captures targeted feedback from WestWorld users and key stakeholders (including City staff, renters, vendors and City leaders) via interviews and group discussions. The appendix organizes perspectives across strengths and weaknesses, opportunities for success, barriers to success and priorities.

Benchmark Research

Appendix F summarizes benchmarking of selected national peer venues (including Will Rogers Memorial Center, National Western Center/Complex and OC Fair & Event Center). It documents key takeaways on operating practices such as event management software usage, rate structures for space/labor/equipment and common reliance on subsidies (via major events or government funding mechanisms).

Implementation Tracking Tool Guide

Appendix G is a practical “how-to” guide for using the implementation tracking tool. This appendix explains how to update actions, owners, timelines, status, dependencies and performance measures so City leadership and WestWorld staff can track progress, flag issues and report on implementation status over time.

APPENDIX A. Market Analysis

Keen Independent presents a market analysis examining the special events landscape in Scottsdale, Arizona.

Market areas. For this market analysis, Keen Independent gathered demographic, spending and market potential information about the population of the following market areas we defined:

Introduction

This appendix includes an analysis of the following elements to help illustrate WestWorld’s position among the greater special events and equestrian marketplace.

- Primary market (within 15 minutes of drive time);
- Secondary market (within 30 minutes of drive time); and
- Tertiary market (within 60 minutes of drive time).

These market areas are illustrated in Figure A-1.

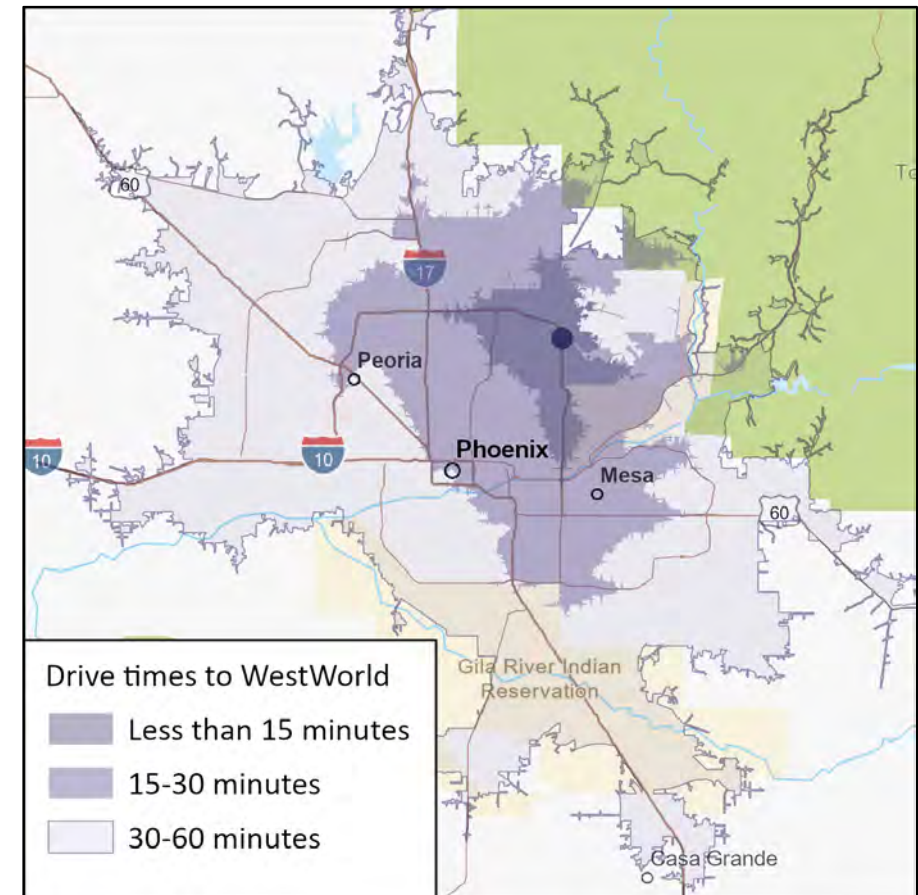
Population projections. We developed and analyzed population projections for the City of Scottsdale based on data provided by the Arizona Office of Economic Opportunity and the U.S. Census Bureau.

Venue inventory. We inventoried relevant high-capacity special event and performance venues as well as equestrian centers and RV campgrounds. We then mapped their locations to illustrate how they relate geographically to WestWorld.

Rental rates. Keen Independent collected rental rates at comparable venues to compare WestWorld’s pricing with that of other venues in the marketplace.

Tourism. Finally, the study team examined tourism data provided by the City to gain insight into how visitors interact with the arts.

A-1. Map of WestWorld market areas



Source: Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, ArcGIS, Keen Independent Research.

A. Market Analysis — Demographics

Keen Independent analyzed the population within WestWorld’s market areas and compared them to national averages.

Age, Race and Ethnicity

Figure A-2 displays population, median age and race/ethnicity for market area populations compared to the national average. The primary market area has an older population with a median age of more than five years older than the other market areas and national average.

A-2. Age, race and ethnicity for WestWorld market area population, 2024

| | Primary market | Secondary market | Tertiary market | United States |
|--------------------------------|----------------|------------------|------------------|--------------------|
| Total population | 345,792 | 2,341,828 | 4,868,702 | 338,056,045 |
| Median Age | 44.7 | 38.2 | 37.9 | 39.3 |
| Race | | | | |
| African American | 2.2 % | 5.6 % | 6.1 % | 12.5 % |
| Asian American | 7.2 | 5.7 | 4.8 | 6.4 |
| Native American | 1.1 | 2.7 | 2.5 | 1.2 |
| Pacific Islander | 0.1 | 0.3 | 0.3 | 0.2 |
| Other race | 4.7 | 11.4 | 13.9 | 8.8 |
| Two or more races | 9.5 | 12.8 | 14.1 | 10.7 |
| White | 75.1 | 61.6 | 58.3 | 60.3 |
| Total | 100.0 % | 100.0 % | 100.0 % | 100.0 % |
| Ethnicity (of any race) | | | | |
| Hispanic American | 13.0 % | 26.2 % | 31.4 % | 19.6 % |
| Non-Hispanic | 87.1 | 73.8 | 68.6 | 80.4 |
| Total | 100.0 % | 100.0 % | 100.0 % | 100.0 % |

Source: U.S. Census Bureau American Community Survey via Esri.

Household Income and Educational Attainment

Figure A-3 provides an overview of income and educational attainment for market area populations compared to the national average. The primary market area is notably wealthier than the other market areas and the national average. All market areas have a higher median household income than the national average. The primary market area population also has the highest portion of individuals age 25+ with Bachelor’s and Graduate degrees.

A-3. Household income and educational attainment for WestWorld market area population, 2024

| | Primary market | Secondary market | Tertiary market | United States |
|---------------------------------------|-------------------|------------------|------------------|--------------------|
| Total households | 154,137 | 963,976 | 1,825,505 | 130,537,241 |
| Household income | | | | |
| \$24,999 or less | 7.7 % | 11.8 % | 10.7 % | 14.9 % |
| \$25,000 to \$49,999 | 11.4 | 15.5 | 14.7 | 16.8 |
| \$50,000 to \$74,999 | 13.1 | 16.1 | 16.3 | 15.7 |
| \$75,000 to \$99,999 | 12.9 | 13.9 | 14.3 | 12.8 |
| \$100,000 to \$199,999 | 32.6 | 29.2 | 31.1 | 27.2 |
| \$200,000 or more | 22.3 | 13.6 | 13.0 | 12.6 |
| Total | 100.0 % | 100.0 % | 100.0 % | 100.0 % |
| Median household income | \$ 108,818 | \$ 85,203 | \$ 87,849 | \$ 79,043 |
| Education (population age 25+) | | | | |
| Less than high school | 3.8 % | 7.9 % | 9.2 % | 9.4 % |
| High school | 14.4 | 20.5 | 23.5 | 26.8 |
| Some college | 24.6 | 29.0 | 30.2 | 27.1 |
| Bachelor's degree | 35.0 | 26.8 | 23.8 | 22.5 |
| Graduate degree | 22.4 | 15.8 | 13.3 | 14.3 |
| Total | 100.0 % | 100.0 % | 100.0 % | 100.0 % |

Source: U.S. Census Bureau American Community Survey via Esri.

A. Market Analysis — Spending and behavior

Keen Independent analyzed the spending and market potential behaviors of the population within WestWorld’s market areas and compared them to national averages.

Entertainment Spending Potential

Figure A-4 displays selected spending potential indices (SPI) for WestWorld market area population for categories such as entertainment/recreation and sports events.

Spending potential indices (SPI) compare the average amount spent locally for a product to the average amount spent nationally. An index of 100 reflects the U.S. average. All SPIs measure a 12-month period unless otherwise stated in the chart.

Spending potential is notably higher among the primary market area population than other market areas. However, nearly all market areas exceed the national average in spending potential. This is consistent with the market area’s higher annual household income levels.

A-4. Spending potential indices for WestWorld market area population, 2024

| | Primary market | Secondary market | Tertiary market | United States |
|---|----------------|------------------|-----------------|---------------|
| Entertainment/recreation | | | | |
| <i>Index</i> | 137 | 105 | 105 | 100 |
| Average | \$ 5,614 | \$ 4,312 | \$ 4,311 | \$ 4,104 |
| Entertainment/recreation fees/admissions | | | | |
| <i>Index</i> | 145 | 106 | 106 | 100 |
| Average | \$ 1,194 | \$ 877 | \$ 873 | \$ 820 |
| Tickets to theater/operas/concerts | | | | |
| <i>Index</i> | 149 | 109 | 106 | 100 |
| Average | \$ 113 | \$ 83 | \$ 81 | \$ 76 |
| Tickets to parks or museums | | | | |
| <i>Index</i> | 139 | 109 | 110 | 100 |
| Average | \$ 52 | \$ 41 | \$ 41 | \$ 37 |
| Tickets to movies | | | | |
| <i>Index</i> | 143 | 117 | 116 | 100 |
| Average | \$ 35 | \$ 29 | \$ 29 | \$ 24 |
| Live entertainment-catered affairs | | | | |
| <i>Index</i> | 136 | 105 | 99 | 100 |
| Average | \$ 27 | \$ 21 | \$ 20 | \$ 20 |
| Sports events admission | | | | |
| <i>Index</i> | 138 | 103 | 100 | 100 |
| Average | \$ 109 | \$ 81 | \$ 79 | \$ 79 |

Source: Esri spending potential database based on U.S. Bureau of Labor Statistics Consumer Expenditure Survey (2024).

A. Market Analysis — Spending and behavior

Entertainment Market Potential

Figures A-5 and A-6 display selected market potential indices (MPI) of the WestWorld market areas. Market potential indices (MPI) measure the relative likelihood of local consumers in the specified areas to engage in selected activities or demonstrate potentially relevant behaviors or purchasing patterns. An MPI of 100 represents the national average. This measure indicates the percentage of residents who have engaged in an activity or behavior at least once in 12 months.

A-5. Market potential indices for WestWorld market area population, 2024

| | Primary Market | Secondary Market | Tertiary Market | United States |
|--|----------------|------------------|-----------------|---------------|
| High school super sports fan <i>Index</i> | 2 % 81 | 2 % 84 | 2 % 91 | 2 % 100 |
| Ordered sports event tickets online (last 6 months) <i>Index</i> | 6 % 109 | 6 % 107 | 5 % 100 | 5 % 100 |
| Attended a... | | | | |
| High school sports event <i>Index</i> | 4 % 103 | 3 % 96 | 4 % 100 | 4 % 100 |
| Sports event <i>Index</i> | 17 % 109 | 16 % 102 | 16 % 100 | 16 % 100 |
| Horse races <i>Index</i> | 2 % 92 | 2 % 97 | 2 % 100 | 2 % 100 |
| Auto show <i>Index</i> | 6 % 104 | 5 % 100 | 5 % 100 | 5 % 100 |
| State or county fair <i>Index</i> | 9 % 87 | 10 % 97 | 11 % 100 | 11 % 100 |

Source: Esri market potential database based on MRI Simmons Survey (2024).

A-6. Market potential indices for WestWorld market area population, 2024

| | Primary Market | Secondary Market | Tertiary Market | United States |
|---|----------------|------------------|-----------------|---------------|
| Went to a museum <i>Index</i> | 16 % 122 | 15 % 110 | 14 % 104 | 13 % 100 |
| Went to an art gallery <i>Index</i> | 12 % 125 | 10 % 112 | 10 % 104 | 9 % 100 |
| Went to a live theater <i>Index</i> | 11 % 123 | 9 % 108 | 9 % 103 | 9 % 100 |
| Danced or went dancing <i>Index</i> | 6 % 94 | 7 % 109 | 7 % 110 | 7 % 100 |
| Attended a... | | | | |
| Classical/opera performance <i>Index</i> | 4 % 129 | 4 % 112 | 3 % 102 | 3 % 100 |
| Country music performance <i>Index</i> | 5 % 100 | 5 % 102 | 5 % 107 | 5 % 100 |
| Dance performance <i>Index</i> | 3 % 105 | 3 % 104 | 3 % 101 | 3 % 100 |
| Movie (last 6 months) <i>Index</i> | 45 % 103 | 45 % 103 | 45 % 103 | 44 % 100 |
| Rock music performance <i>Index</i> | 10 % 118 | 9 % 109 | 9 % 105 | 8 % 100 |

Source: Esri market potential database based on MRI Simmons Survey (2024).

A. Market Analysis — Population forecasts

Population projections can inform potential future demand for various types of events that may take place at WestWorld. Figure A-7 depicts the population projections for the City of Scottsdale based on data from the Arizona Office of Economic Opportunity and U.S. Census Bureau. In 2022, the City population was just under 250,000 and it is projected to increase to about 350,000 people by year 2050.

Population by Age in 2022

Figure A-8 on the following page illustrates the age distribution of the Scottsdale population. The graphs show the population group according to widely recognized generations beginning with the Silent Generation (born between 1926 and 1945) to Gen Z (born between 1996 and 2010) and the Alpha Generation (born in 2011 and later years).

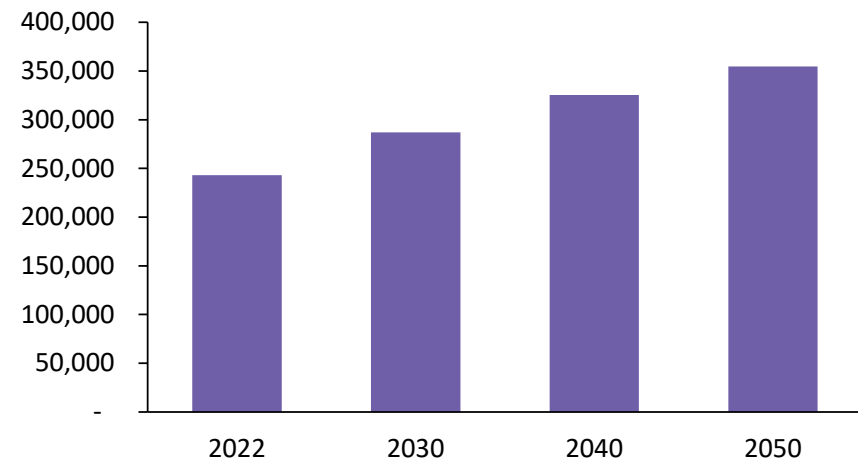
In 2022, Baby Boomers (ages 55 to 74) were by far the largest generation totaling nearly 68,000. Gen X (ages 40 to 54) and Millennials (ages 25 to 39) made up roughly equal shares of the population at 45,000 and 47,000, respectively. The Silent Generation (ages 75 and older) and Gen Z (ages 10 to 24) made up roughly equal shares of the population at 32,000 and 35,000, respectively, and Alpha Gen (ages 0 to 9) comprised about 16,000 of Scottsdale’s residents.

Population by Age in 2050

Figure A-8 also presents the projected age distribution for the Scottsdale population. In 2050, the Scottsdale population will have significantly aged. Millennials and Gen X are projected to each have populations of over 70,000.

The proportion of residents under 40 remains relatively consistent between 2022 and 2050, which is reflective of recent trends of Gen X, Millennials and Gen Z having fewer children.

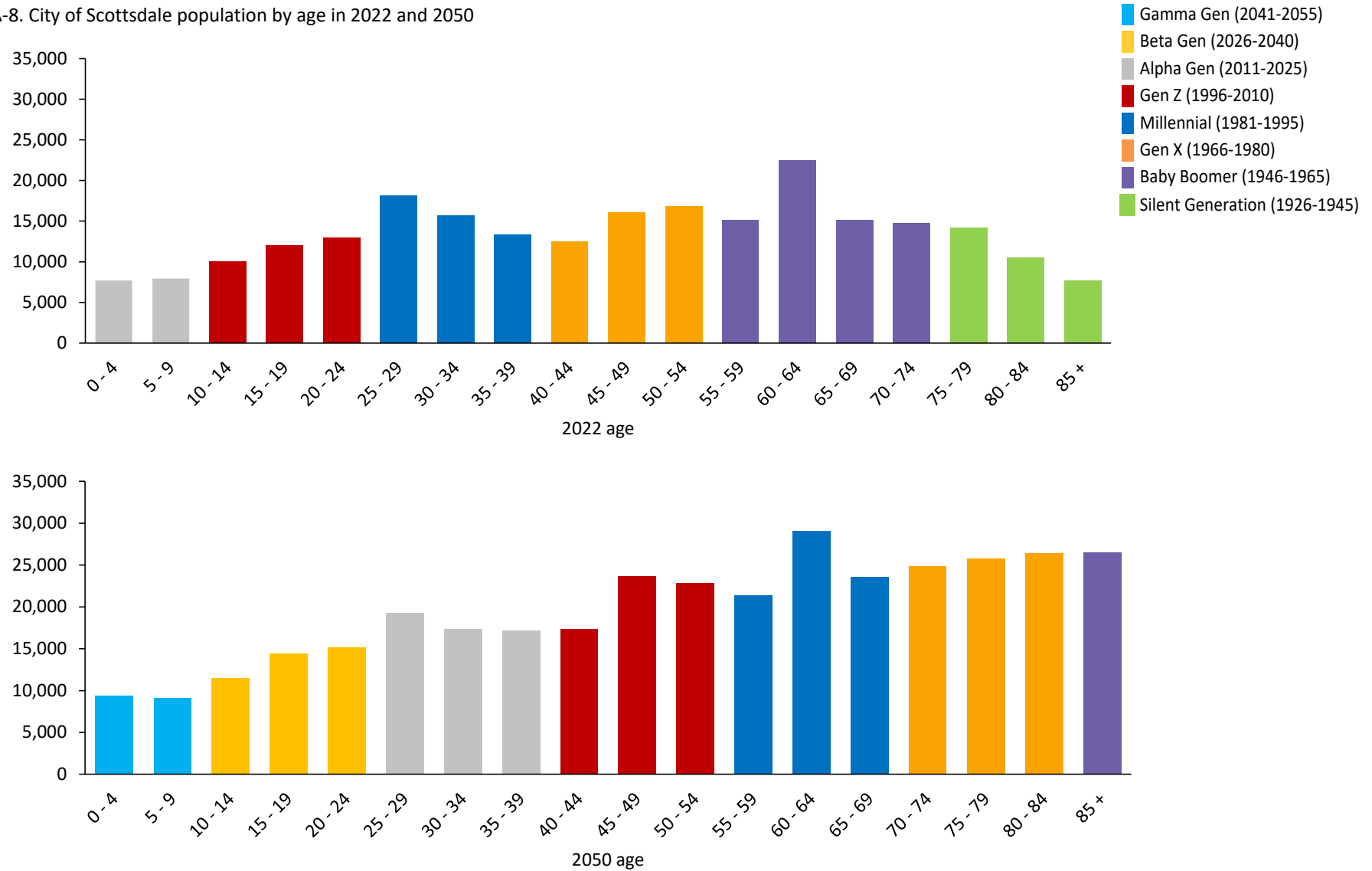
A-7. Projected population change for City of Scottsdale, 2022–2050



Source: Arizona Office of Economic Opportunity, U.S. Census Bureau and Keen Independent Research.

A. Market Analysis — Population forecasts

A-8. City of Scottsdale population by age in 2022 and 2050



Source: Arizona Office of Economic Opportunity, Keen Independent Research.

A. Market Analysis — Venue inventory

To identify potential gaps in the market for various types of venues, Keen Independent compiled an inventory of high-capacity event venues, high-capacity performance venues, equestrian arenas, RV campgrounds and convention/conference/expo centers in the metro Phoenix area.

Figures A-9 through A-12 display the names, locations and capacities of the venues we inventoried. Following the inventory tables, we include maps showing the locations of all venues in relation to WestWorld’s market areas (Figures A-14 to A-17).

High-Capacity Event Venues

Figure A-9 provides a list of event spaces with capacities of 700 or more. The metro Phoenix area has a high concentration of event venues, creating strong competition for WestWorld in attracting events to Monterra. Because many of these venues host upscale, luxury-level events, WestWorld may need to emphasize what distinguishes Monterra from nearby competitors to attract certain events.

Figure A-15 later in this appendix illustrates the close proximity of about nine event venues within a three-mile radius of WestWorld, with two of those venues being able to accommodate at least 1,000 individuals.

A-9. Event spaces in the metro Phoenix area with a 700+ capacity

| Event spaces (700+ capacity) | City | Capacity |
|---|------------|----------|
| WestWorld (Monterra) | Scottsdale | 800 |
| American Royal Palace | Phoenix | 1,200 |
| Arizona Grand Resort & Spa | Phoenix | |
| Canyon Ballroom | | 2,200 |
| Arizona Grand Ballroom | | 2,200 |
| Sonoran Sky Ballroom | | 1,540 |
| South Mountain Ballroom | | 880 |
| Oasis Patio | | 700 |
| The Barn at Desert Foothills | Scottsdale | 1,500 |
| Caesars Republic Scottsdale (Romulus Ballroom) | Scottsdale | 900 |
| Clayton House - Great Room | Scottsdale | 800 |
| Delta Hotels Phoenix Mesa | Mesa | |
| Arizona Ballroom | | 1,000 |
| Main Hall | | 1,815 |
| DoubleTree Resort by Hilton Hotel Paradise Valley - Scottsdale | Scottsdale | |
| The Forum | | 1,500 |
| Paradise Park | | 1,400 |
| North Forum | | 750 |
| South Forum | | 750 |
| DoubleTree by Hilton Hotel Phoenix - Gilbert (Grand Ballroom) | Gilbert | 800 |
| Eduardo's Reception Hall | Mesa | 800 |
| El Gran Salon & El Gran Palacio Reception Hall | Phoenix | 900 |

Source: Keen Independent Research.

A. Market Analysis — Venue inventory

A-9. Event spaces in the metro Phoenix area with a 700+ capacity (continued)

| Event spaces (700+ capacity) | City | Capacity |
|---|------------|----------|
| Embassy Suites by Hilton Phoenix Scottsdale (Ballroom) | Phoenix | 700 |
| Fairmont Scottsdale Princess | Scottsdale | |
| Palomino Ballroom | | 2,990 |
| Princess Ballroom | | 2,990 |
| East Foyer | | 860 |
| Gila River Resorts & Casinos - Wild Horse Pass | Chandler | |
| Palo Verde Ballroom | | 1,245 |
| The Showroom | | 1,400 |
| Grand Hyatt Scottsdale Resort | Scottsdale | |
| Vaquero Ballroom | | 1,030 |
| Arizona Ballroom | | 1,400 |
| Lawn Court | | 800 |
| Hilton Phoenix Resort at the Peak | Phoenix | |
| Anasazi Ballroom | | 1,020 |
| Hohokam Ballroom | | 900 |
| Hilton Scottsdale Resort & Villas | Scottsdale | |
| Grand Ballroom | | 900 |
| Pavillion | | 756 |
| Hyatt Regency | Phoenix | |
| Regency Ballroom | | 1,100 |
| Atrium | | 700 |

Source: Keen Independent Research.

A-9. Event spaces in the metro Phoenix area with a 700+ capacity (continued)

| Event spaces (700+ capacity) | City | Capacity |
|---|------------|----------|
| JW Marriott Phoenix Desert Ridge Resort & Spa | Phoenix | |
| The Grand Canyon Ballroom | | 4,000 |
| The Grand Sonoran Ballroom | | 2,900 |
| Grand Saguaro Ballroom | | 2,750 |
| Ballroom Lawn | | 1,800 |
| Tierra Madre | | 2,150 |
| Desert Kivas | | 900 |
| Sunset Lawn | | 1,000 |
| JW Marriott Scottsdale Camelback Inn Resort & Spa | Scottsdale | |
| Arizona Ballroom | | 2,100 |
| Paradise Ballroom | | 1,570 |
| Sonoran Terrace | | 800 |
| Mummy Mountain 1 | | 700 |
| Marriott Phoenix Resort Tempe at The Buttes (Kachina Ballroom) | Tempe | 900 |
| Omni Scottsdale Montelucia (Alhambra Ballroom) | Scottsdale | 1,000 |
| Omni Tempe Hotel | Tempe | 1,350 |
| The Phoenician | Scottsdale | |
| Phoenician Grand Ballroom | | 2,500 |
| Ballroom South Foyer | | 1,332 |
| Estrella Theater | | 872 |
| Ballroom East Foyer | | 1,046 |
| The Camelback Ballroom | | 1,500 |
| Phoenix Shrine Auditorium and Event Center (Auditorium) | Phoenix | 1,500 |

Source: Keen Independent Research.

A. Market Analysis — Venue inventory

A-9. Event spaces in the metro Phoenix area with a 700+ capacity (continued)

| Event spaces (700+ capacity) | City | Capacity |
|--|------------|----------|
| Rawhide | Chandler | |
| Rodeo Arena | | 6,500 |
| Rawhide Event Center | | 6,000 |
| Maricopa Wells | | 1,500 |
| Renaissance Phoenix Downtown Hotel | Phoenix | |
| Grand Ballroom | | 950 |
| Pueblo | | 850 |
| Renaissance Phoenix Glendale Hotel & Spa | Glendale | |
| Solana Ballroom | | 3,200 |
| Cira Ballroom | | 750 |
| Media Center | | 3,400 |
| Scottsdale Private Event Venues | Scottsdale | |
| The Aviator Hangar | | 2,000 |
| Hangar 7 Scottsdale | | 800 |
| Deadhead Event Hangar | | 1,500 |
| Legacy 600 Event Hangar | | 1,000 |
| Lux Air Hangar Goodyear | | 1,500 |
| Scottsdale Hangar | | 1,500 |
| Scottsdale Corporate Event Venues | | 1,000 |
| The Scottsdale Resort and Spa, Curio Collection by Hilton | Scottsdale | |
| Grand Coronado | | 1,000 |
| McCormick Pool | | 700 |

Source: Keen Independent Research.

A-9. Event spaces in the metro Phoenix area with a 700+ capacity (continued)

| Event spaces (700+ capacity) | City | Capacity |
|---|-----------------|----------|
| Sheraton Grand at Wild Horse Pass | Chandler | |
| Akimel Ballroom | | 1,900 |
| Kave Ballroom | | 700 |
| Komatke Ballroom | | 1,500 |
| Hemapik Lawn | | 1,000 |
| Sheraton Mesa Hotel at Wrigleyville West (Canyon Ballroom) | Mesa | 1,250 |
| Talking Stick Resort (Salt River Grand Ballroom) | Scottsdale | 2,900 |
| Venue at Volanti (Hangars) | Scottsdale | 5,000 |
| W Scottsdale (WET Deck) | Scottsdale | 1,000 |
| We-Ko-Pa Casino Resort | Fort McDowell | |
| Wassaja Ballroom | | 1,000 |
| Cholla Golf Course | | 500 |
| Resort Courtyard | | 300 |
| La Puesta Del Sol | | 500 |
| Rosa's Ranch | | 300 |
| The Westin Kierland Resort & Spa | Scottsdale | |
| Herberger Ballroom | | 2,005 |
| Kierland Grand Ballroom | | 3,601 |
| Trailblazer Ballroom | | 1,216 |
| Wigwam Arizona (Ballroom) | Litchfield Park | 1,200 |

Source: Keen Independent Research.

A. Market Analysis — Venue inventory

High-Capacity Performance Venues

Although WestWorld does not have a dedicated performance venue, it has hosted concerts on its grounds with a temporary stage build. Figures A-10 provides an inventory of high-capacity performance venues in the metro Phoenix area. The metro area includes many high-capacity performance venues, most of which are located further south and west of WestWorld. About four venues on this list are amphitheaters/outdoor performance venues.

A-10. Performance venues in the metro Phoenix area with a 1,000+ capacity

| Performance venues | City | Capacity |
|--|---------------|----------|
| E. Lowell Rogers Amphitheatre | Glendale | 1,000 |
| Faith Arena | Surprise | 1,000 |
| Nile Theater | Mesa | 1,000 |
| Glendale Civic Center | Glendale | 1,100 |
| Sundial Auditorium | Sun City | 1,158 |
| Higley Center for the Performing Arts | Gilbert | 1,235 |
| The Vista Center for the Arts | Surprise | 1,286 |
| The Showroom at Wild Horse Pass | Chandler | 1,400 |
| Orpheum Theatre | Phoenix | 1,410 |
| Marquee Theatre Tempe | Tempe | 1,500 |
| Phoenix Shrine Auditorium | Phoenix | 1,500 |
| Chandler Center for the Arts - Mainstage Theatre | Chandler | 1,508 |
| Mesa Arts Center - Tom and Janet Ikeda Theater | Mesa | 1,600 |
| Scottsdale Civic Center Amphitheater | Scottsdale | 1,800 |
| The Van Buren | Phoenix | 1,800 |
| We-Ko-Pa Conference Center | Fort McDowell | 2,000 |

Source: Keen Independent Research.

A-10. Performance venues in the metro Phoenix area with a 1,000+ capacity (continued)

| Performance venues | City | Capacity |
|---|----------|----------|
| Phoenix Symphony Hall | Phoenix | 2,312 |
| Celebrity Theatre | Phoenix | 2,650 |
| ASU Gammage | Tempe | 3,000 |
| Walter Where?House | Phoenix | 3,000 |
| Arizona State Fair Grandstand Arena | Phoenix | 4,000 |
| Mesa Amphitheatre | Mesa | 4,950 |
| Arizona Financial Theatre | Phoenix | 5,000 |
| Mullett Arena | Tempe | 5,000 |
| Rawhide Event Center | Chandler | 6,000 |
| Grand Canyon University - Global Credit Union Arena | Phoenix | 7,000 |
| Sun Bowl Amphitheater | Sun City | 7,000 |
| Arizona Veterans Memorial Coliseum | Phoenix | 14,870 |
| Footprint Center | Phoenix | 18,422 |
| Desert Diamond Arena | Glendale | 19,000 |
| Talking Stick Resort Amphitheatre | Phoenix | 20,106 |
| Chase Field | Phoenix | 48,633 |
| State Farm Stadium | Glendale | 63,400 |

Source: Keen Independent Research.

A. Market Analysis — Venue inventory

Equestrian Arenas

Figure A-11 is a list of equestrian arenas in the metro Phoenix area. While there are a notable number of equestrian arenas in the area, they cannot accommodate events at the same scale or capacity as WestWorld. These other venues may be suitable for smaller equestrian events during times when WestWorld's unavailable to host them.

A-11. Equestrian arenas in the metro Phoenix area

| Name | City |
|------------------------------------|-----------------|
| 4D Arena | Wittmann |
| Apache Junction Rodeo Grounds | Apache Junction |
| Arizona Horse Lovers Park | Phoenix |
| Buckeye Arena | Buckeye |
| Casa Grande Rodeo Grounds | Casa Grande |
| Cave Creek Memorial Arena | Cave Creek |
| Desert Palms Equestrian Center | Phoenix |
| Dillons Western Trails Ranch | Morristown |
| Downtown Roping Arena | Wickenburg |
| Dunn's Arena | Litchfield |
| Dynamite Arena | Cave Creek |
| Everett Bowman Rodeo Arena | Wickenburg |
| Horseshoe Park & Equestrian Centre | Queen Creek |
| KOLI Equestrian Center | Chandler |
| P&M Arena | Mesa |
| Ponderosa Rebel Arena | Phoenix |
| Rancho Ochoa | Phoenix |
| Rancho Rio Arena | Wickenburg |
| Rawhide | Chandler |
| Stonegate Equestrian Park | Scottsdale |

Source: Keen Independent Research.

A. Market Analysis — Venue inventory

RV Campgrounds

Figure A-12 provides a list of RV campgrounds in the metro Phoenix area. Outside of dates when large events are held at WestWorld, there is notable competition from other campsites in the area. Other campsites offer more natural, scenic settings or more affordable options in central locations. Figure A-16 later in this appendix illustrates the location of other RV campgrounds in relation to WestWorld.

Convention/Conference/Expo Centers

Figure A-13 provides a list of convention/conference/expo centers in the Phoenix area along with their available square footage for meetings and expos. Convention, conference and expo centers typically attract events and attendees at a wider, more regional scale. With such high capacities and square footage, it is reasonable to see fewer venues of this type within a market.

AZ Exposition & State Fairgrounds has similar square footage to WestWorld. While WestWorld may compete with all these venues for regional high-impact events, it is most comparable to the AZ Exposition & State Fairgrounds.

A-12. RV campgrounds in the metro Phoenix area

| Name | City |
|-----------------------------------|------------|
| Cave Creek Regional Park | Cave Creek |
| Clay Target Center | Phoenix |
| Covered Wagon RV Park | Phoenix |
| Desert Sands RV Park | Phoenix |
| Desert Shadows RV Resort | Phoenix |
| Encore Paradise (age 55 plus) | Sun City |
| Estrella Mountain Park | Goodyear |
| Lake Pleasant Regional Park | Morristown |
| McDowell Mountain Park | Scottsdale |
| Phoenix Metro RV Park | Phoenix |
| Pioneer RV Resort (age 55 plus) | Phoenix |
| Plaza Verde RV & Mobile Home Park | Phoenix |
| Pleasant Harbor RV Resort | Peoria |
| Usery Mountain Regional Park | Mesa |
| White Tank Mountain Regional Park | Waddell |

Source: Keen Independent Research.

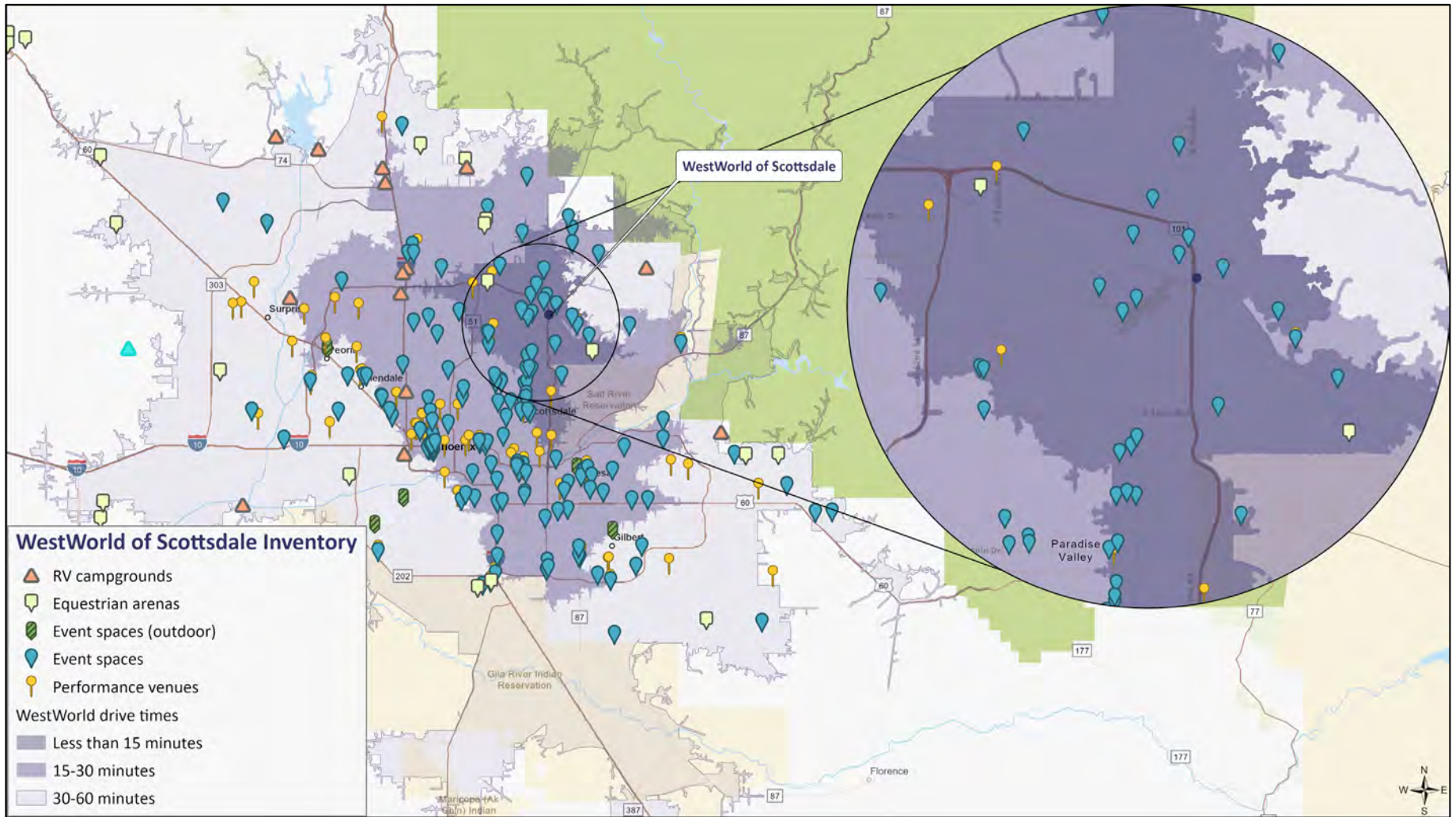
A-13. Convention/conference/expo centers in the metro Phoenix area

| Name | City | Total meeting/expo space square footage |
|-----------------------------------|-------------------|---|
| We-Ko-Pa Conference Center | FortMcDowell | 25,000 |
| Mesa Convention Center | Mesa | 40,000 |
| AZ Exposition & State Fairgrounds | Phoenix | 283,906 |
| WestWorld | Scottsdale | 300,000 + |
| Phoenix Convention Center | Phoenix | 1,000,000 |

Source: Keen Independent Research.

A. Market Analysis — Venue inventory

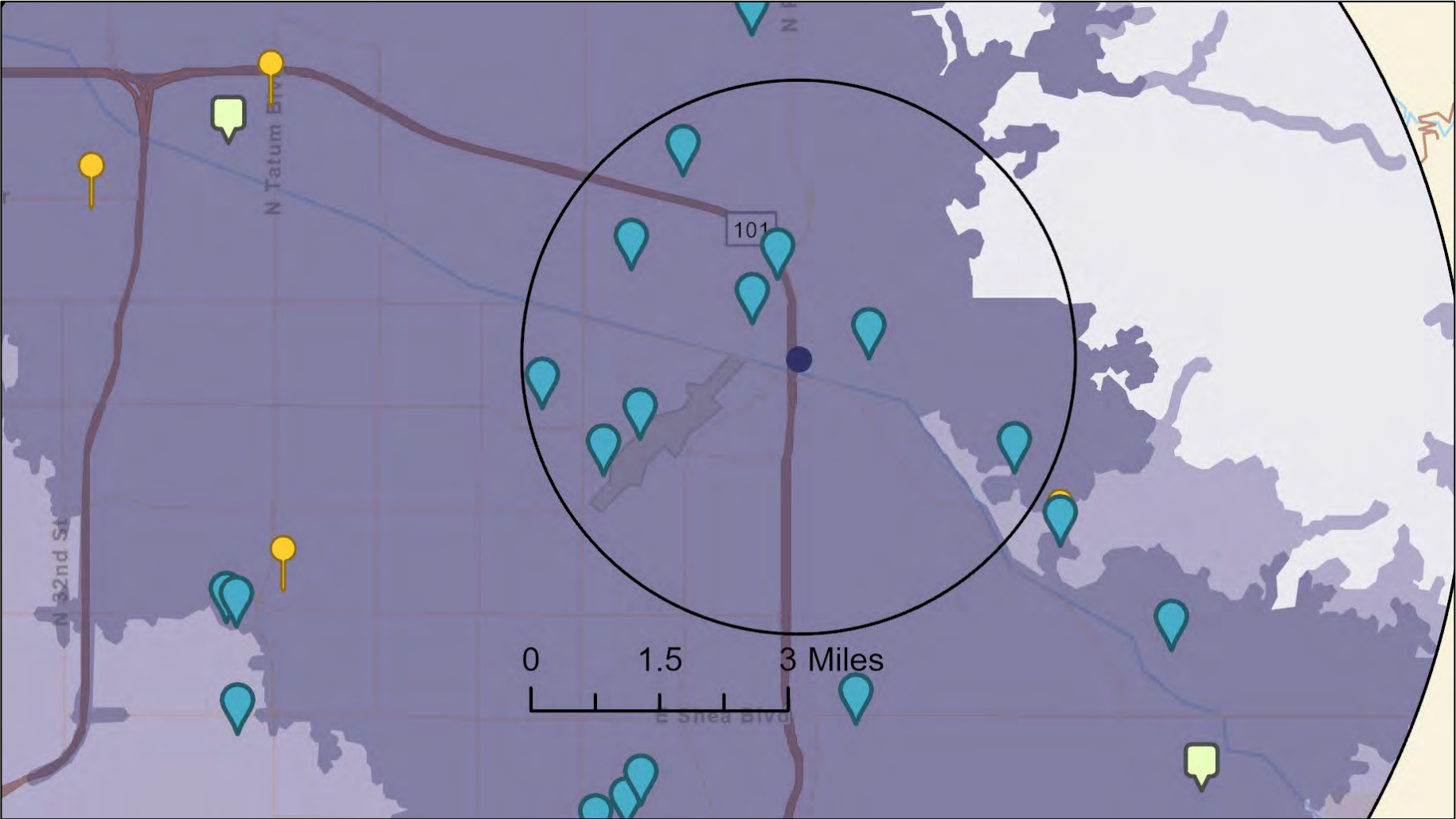
A-14. Map of event venues, performance venues, equestrian arenas and RV campgrounds in the metro Phoenix area



Source: Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, ArcGIS, Keen Independent Research.

A. Market Analysis — Venue inventory

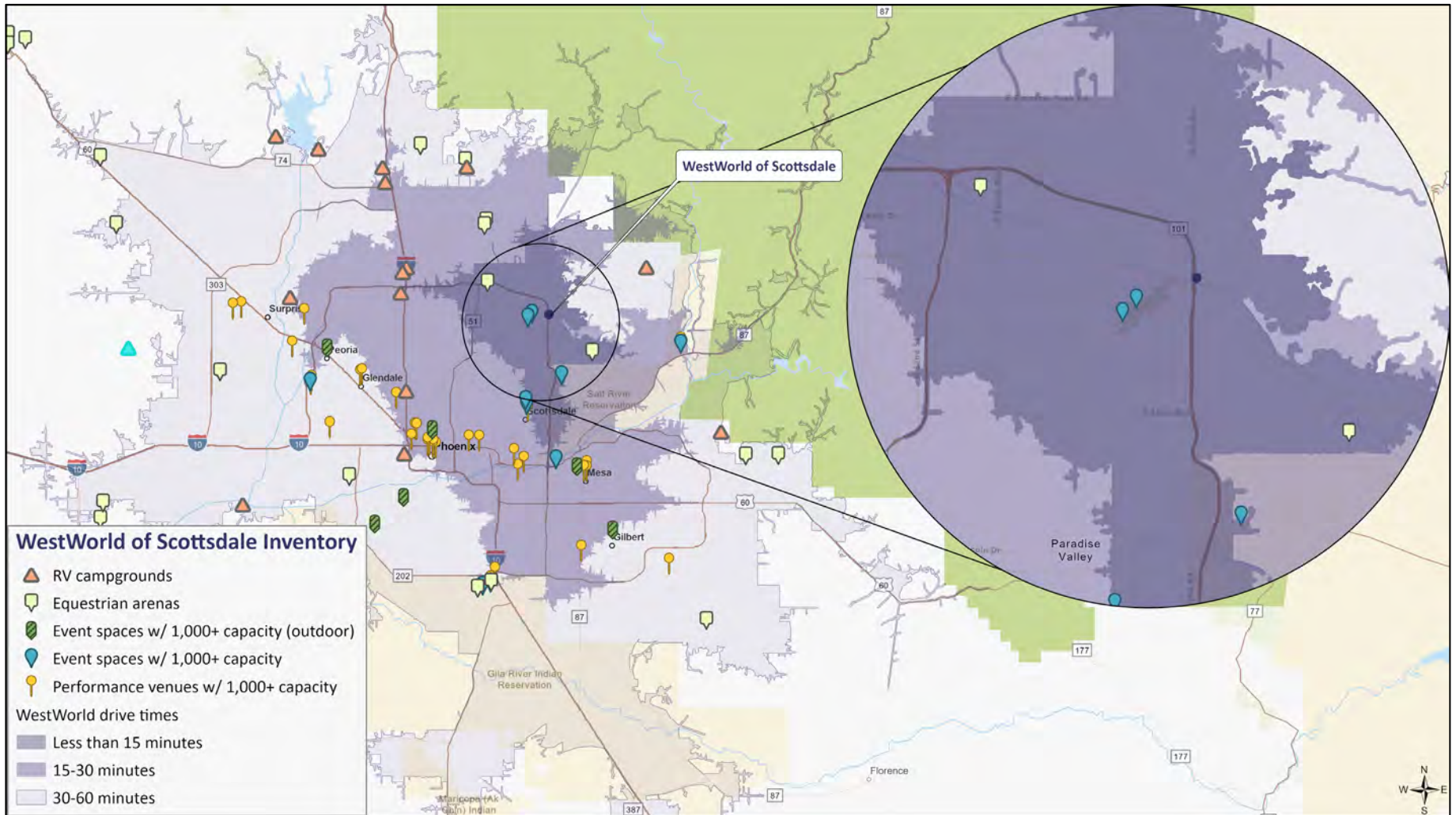
A-15. Location of event venues within about three miles of WestWorld



Source: Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, ArcGIS, Keen Independent Research.

A. Market Analysis — Venue inventory

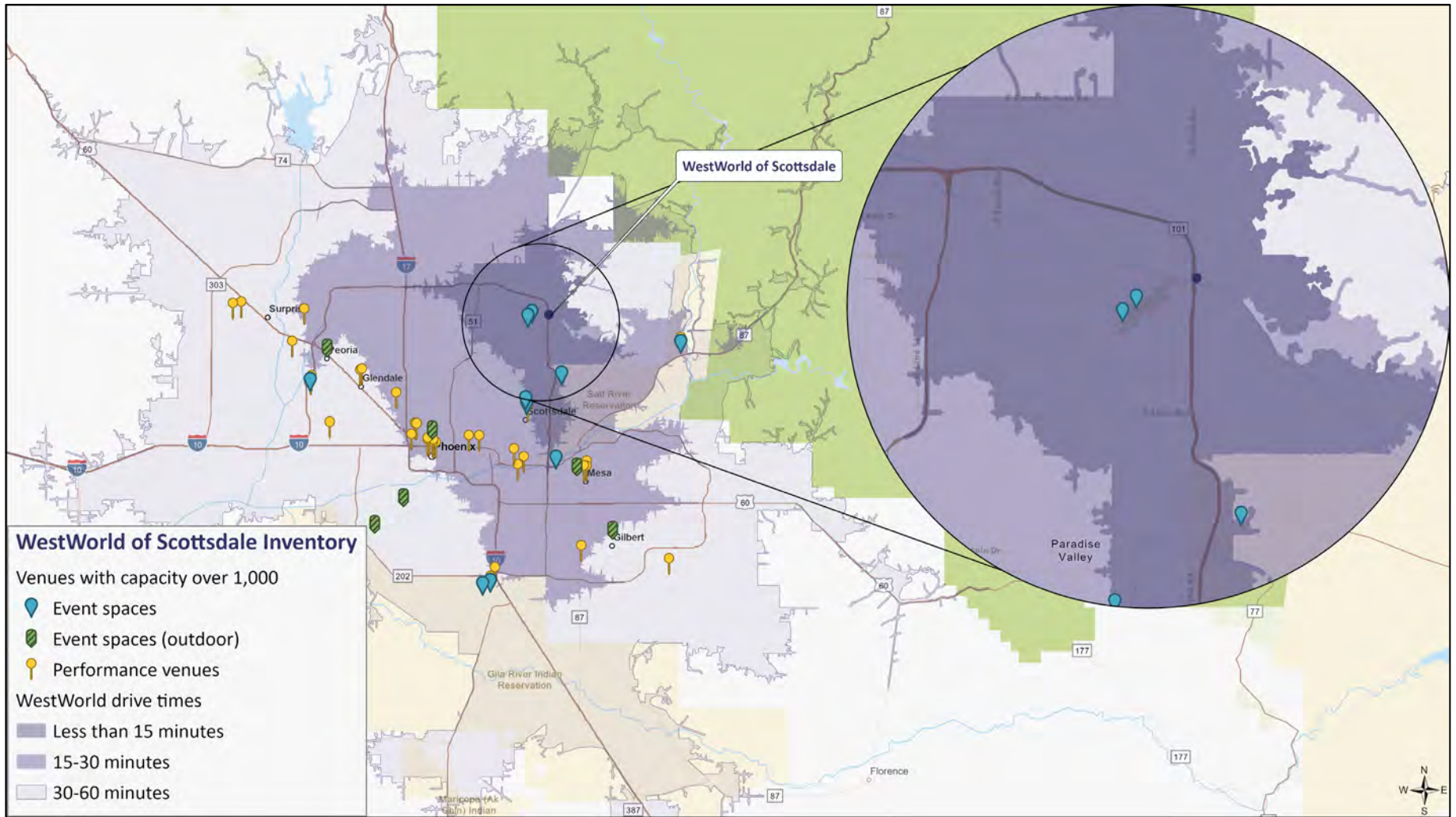
A-16. Map of event venues and performance venues with 1,000+ capacity as well as equestrian arenas and RV campgrounds in the metro Phoenix area



Source: Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, ArcGIS, Keen Independent Research.

A. Market Analysis — Venue inventory

A-17. Map of event venues and performance venues with 1,000+ capacity



Source: Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, ArcGIS, Keen Independent Research.

A. Market Analysis — Rental rates

Keen Independent researched the space rental rates for nearby convention and expo centers as well as other similar venues nationally and compared these rates to WestWorld space rental rates. For more information on benchmark venues, see Appendix F.

Note that space rental rates do not include an analysis of equipment or labor charges. All venues studied have additional charges related to labor and equipment and sometimes require working with third-party companies (e.g. working with an AV company for audio/visual needs).

Arenas and Amphitheaters

We compared rental rates for amphitheaters and arenas with rental rates at WestWorld in Figure A-18. To enable a more direct comparison of venues with varying capacities, we calculated the price per seat. In this figure, spaces are organized by their price per seat available in the venue from highest to lowest.

The Equidome daily rate and price per seat is at the lower end of benchmarks studied, with pricing falling below the median and average of compared rates. Venues with higher rental rates, such as Symphony Hall, Orpheum Theater and SYEC Auditorium, are indoor theaters that have updated sound and lighting systems.

A-18. Rental rate comparison between arenas, amphitheaters and theaters at local and national benchmark venues

| Venue | Space | Capacity | Daily rate | Price per seat |
|-----------------------------|-------------------------------|--------------|--------------|----------------|
| National Western Center | SYEC Auditorium | 630 | \$ 7,500 | \$ 11.90 |
| National Western Center | LVC Arena | 3,000 | 15,000 | 5.00 |
| Phoenix Convention Center | Symphony Hall | 2,312 | 4,000 | 1.73 |
| Phoenix Convention Center | Orpheum Theater | 1,364 | 2,300 | 1.69 |
| Will Rogers Memorial Center | James L. West Sale Arena | 640 | 1,000 | 1.56 |
| Will Rogers Memorial Center | John Justin Arena | 1,934 | 2,500 | 1.29 |
| Will Rogers Memorial Center | Will Rogers Auditorium | 2,856 | 3,500 | 1.23 |
| OC Fair and Event Center | Pacific Amphitheatre | 8,000 | 9,425 | 1.18 |
| Will Rogers Memorial Center | Historic Will Rogers Coliseum | 5,652 | 4,250 | 0.75 |
| WestWorld | Equidome | 3,400 | 2,500 | 0.74 |
| OC Fair and Event Center | Action Sports Arena | 7,000 | 3,125 | 0.45 |
| National Western Center | Amphitheater | N/A | 5,000 | |
| WestWorld | Wendell Arena | N/A | 800 | |
| | <i>Median</i> | 2,856 | \$ 3,500 | \$ 1.29 |
| | <i>Average</i> | 3,344 | 4,685 | 2.50 |

Source: Keen Independent Research.

A. Market Analysis — Rental rates

Outdoor Event Space

Figure A-19 provides a comparison of the rental rates for outdoor event spaces at local and national benchmark venues. To provide a more side-by-side comparison of venues with varying capacities, we calculated the price of each space per square foot. WestWorld’s fee for renting its field is lower than the median and average of both the daily rate and price per square foot of comparable venues. Outdoor spaces at higher rates at the National Western Center include power and water access throughout the event space.

Indoor Event Space

Figure A-20 compares space rental rates for indoor event spaces at local and national benchmark venues. Rental fees for WestWorld indoor event spaces are consistently below both the median and average price per square foot at other similar venues. Venues with higher rental rates have updated sound and lighting systems.

A-19. Rental rate comparison between outdoor event spaces at local and national benchmark venues

| Venue | Space | Square feet | Daily rate | Price per square foot |
|-------------------------|-----------------------------|------------------|--------------|-----------------------|
| National Western Center | LVC Plaza | 43,560 * | \$ 5,000 | \$ 0.11 |
| National Western Center | SYEC West Plaza | 60,000 | 5,000 | 0.08 |
| National Western Center | SYEC North Plaza | 70,000 | 5,000 | 0.07 |
| National Western Center | Riverfront Park | 261,360 * | 15,000 | 0.06 |
| National Western Center | SYEC The Yards | 566,280 * | 25,000 | 0.04 |
| Mesa Convention Center | Grand Plaza | 39,150 | 1,000 | 0.03 |
| WestWorld | Field West and Lot D | 871,200 * | 4,750 | 0.01 |
| OC Fair & Event Center | Festival Fields (asphalt) | N/A | 3,750 | |
| OC Fair & Event Center | Festival Fields (grass) | N/A | 2,650 | |
| | <i>Median</i> | 70,000 | \$ 5,000 | \$ 0.06 |
| | <i>Average</i> | 273,079 | 7,461 | 0.06 |

Note: *Square footage estimated based on number of acres available.

Source: Keen Independent Research.

A-20. Rental rate comparison between indoor event space at local and national benchmark venues

| Venue | Space | Square feet | Daily rate | Price per square foot |
|-----------------------------|---------------------------|----------------|---------------|-----------------------|
| National Western Center | LVC Flex | 10,000 | \$ 7,500 | \$ 0.75 |
| National Western Center | LVC 360 | 3,000 | 2,000 | 0.67 |
| National Western Center | SYEC Expo Hall | 18,000 | 10,000 | 0.56 |
| Phoenix Convention Center | Multipurpose Rooms | N/A | N/A | 0.39 |
| Phoenix Convention Center | North Ballroom | 45,600 | N/A | 0.39 |
| Phoenix Convention Center | Exhibit Halls | 403,500 | N/A | 0.33 |
| National Western Center | LVC Expo North | 40,000 | 12,000 | 0.30 |
| Mesa Convention Center | Building B | 8,686 | 2,250 | 0.26 |
| Mesa Convention Center | Building A | 7,620 | 1,750 | 0.23 |
| OC Fair & Event Center | Anaheim Building | 12,636 | 2,725 | 0.22 |
| OC Fair & Event Center | Los Alamitos Building | 16,640 | 3,425 | 0.21 |
| OC Fair & Event Center | Huntington Beach Building | 19,572 | 3,825 | 0.20 |
| OC Fair & Event Center | The Hangar | 22,245 | 4,025 | 0.18 |
| Mesa Convention Center | Building C | 19,671 | 3,000 | 0.15 |
| OC Fair & Event Center | OC Promenade | 18,025 | 2,725 | 0.15 |
| OC Fair & Event Center | Santa Ana Pavilion | 16,325 | 2,425 | 0.15 |
| National Western Center | LVC Expo South | 120,000 | 17,500 | 0.15 |
| OC Fair & Event Center | Costa Mesa Building | 34,025 | 4,825 | 0.14 |
| Will Rogers Memorial Center | Round Up Inn | 18,000 | 2,500 | 0.14 |
| Will Rogers Memorial Center | Texas Room | 94,460 | 8,500 | 0.09 |
| WestWorld | South Hall | 37,000 | 3,000 | 0.08 |
| WestWorld | Multi-use Tent | 120,000 | 8,400 | 0.07 |
| WestWorld | North Hall | 117,000 | 7,000 | 0.06 |
| WestWorld | TNEC | 300,000 | 11,000 | 0.04 |
| | <i>Median</i> | 19,671 | \$ 3,825 | \$ 0.19 |
| | <i>Average</i> | 65,305 | 5,732 | 0.25 |

Source: Keen Independent Research.

A. Market Analysis — Tourism data

Keen Independent reviewed tourism data provided by the City of Scottsdale. Longwoods International compiled this data on visits for 2022 and 2023.

Overall Trends

In 2023, visitors took 4.8 million overnight trips to Scottsdale, an increase of just over 1 percent from 2022. Spending on overnight trips totaled more than \$1.56 billion, a 5 percent increase from 2022. Visitors spent about 10 percent of 2023 total spending on recreation and entertainment, which equates to about \$160 million. Trips were fairly evenly distributed throughout the year, with slightly more from January through March and slightly fewer from July through September.

Visitor Profiles

Visitors from Arizona and California made up over 40 percent of overnight visitors to Scottsdale in 2023. Figure B-20 displays additional characteristics, including income, age and race/ethnicity of overnight visitors to Scottsdale in 2022 and 2023. In 2023, the average overnight traveler had a higher median income and was slightly older than the average overnight traveler in 2022.

Activities During Visit

Of all the 2023 overnight visitors to Scottsdale, about 65 percent indicated that they attended entertainment events and about 43 percent reported attending cultural activities. About 10 percent in 2023 said the purpose of their visit was to attend a special event (on par with 2022, which was 9 percent).

A-21. Scottsdale overnight visitor demographics, 2022 and 2023

| | 2022 | 2023 |
|--------------------------------|------------------|------------------|
| Household income | | |
| \$49,999 or less | 31 % | 27 % |
| \$50,000 to \$74,999 | 23 | 19 |
| \$75,000 to \$99,999 | 17 | 16 |
| \$100,000 to \$149,999 | 18 | 22 |
| \$150,000 or more | 11 | 15 |
| Total | 100 % | 100 % |
| Median household income | \$ 74,400 | \$ 95,100 |
| Age | | |
| 18 to 24 | 12 % | 9 % |
| 25 to 34 | 22 | 21 |
| 35 to 44 | 20 | 22 |
| 45 to 54 | 18 | 13 |
| 55 to 64 | 14 | 18 |
| 65+ | 15 | 18 |
| Total | 100 % | 100 % |
| Median age | 44.7 | 46.5 |
| Race/ethnicity | | |
| African American | 10 % | 10 % |
| Hispanic American | 17 | 17 |
| White | 81 | 80 |
| Other race | 11 | 14 |

Note: Median income from 2022 is based on average income of visitors to the Phoenix and Scottsdale areas (reported in an Arizona state tourism document) because 2022 median income was not available in the Scottsdale tourism report. Participants could select more than one race/ethnicity so numbers do not add up to 100.

Source: Longwoods International, City of Scottsdale, Keen Independent Research, 2024.

APPENDIX B. Summary of Key Performance Indicators — Introduction

In this appendix, we analyze initial performance indicators for WestWorld operations to establish a baseline understanding of facility operations. This will inform future data collection that may be needed to measure key performance indicators requested by City leadership.

The performance indicators analyzed in this appendix include:

- **Utilization.** This includes the number of events held at WestWorld and number of use days;
- **Attendance.** We examine overall annual attendance, as well as average attendance per event to account for annual variation in the number of events;
- **Financials.** This includes revenues, expenses, net operating income (or loss) and debt service; and
- **Estimated economic impact.** This includes total estimated economic impact and estimated transaction privilege tax revenue.

B-1. Inside the tent at the Barrett-Jackson Car Auction



Source: Keen Independent Research.

B. Summary of Key Performance Indicators — Utilization

Keen Independent analyzed the total number of events and use days at WestWorld from fiscal year 2016 through fiscal year 2024.

Total events. Figure B-2 shows annual number of distinct events at WestWorld by event type (equestrian or special event) and by fiscal year. Distinct events include single-day equestrian shows as well as multi-day signature events that span multiple weeks.

WestWorld typically hosts nearly 100 distinct events each year, with a peak of about 120 distinct events in fiscal year 2017 and a low of about 70 distinct events in fiscal year 2020. The decline in the number of distinct events in fiscal year 2020 was likely due to cancellations related to the COVID-19 pandemic.

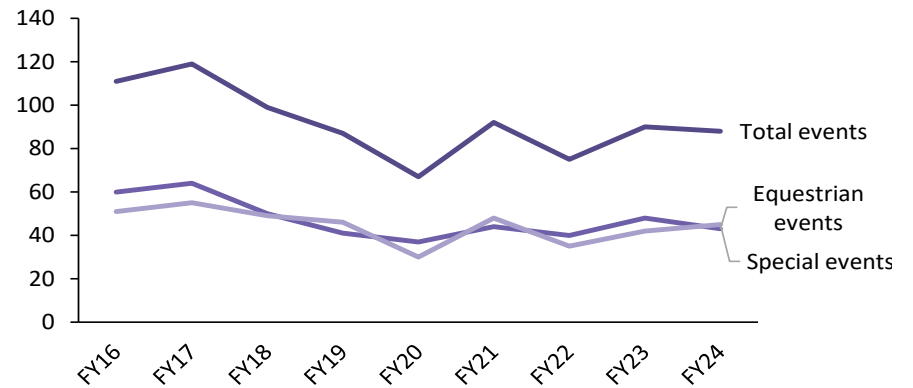
Over the last eight years, the number of equestrian events has been similar to the number of special events that take place at WestWorld.

Use days. Event use days include the total number of days an event utilizes space at WestWorld, including days used for event set up and take down. Use days for events can overlap when more than one event is taking place at WestWorld, therefore, it is not unusual to see total use days exceeding 365 annually. WestWorld typically has between 140 and 190 days annually with more than one event occurring at the same time. Each of these days include more than one “use day.”

Note that the spike in use days in fiscal year 2021 are due to WestWorld accommodating events from other venues that had closed and hosting a number of alternative events like a vaccination drive-thru clinic.

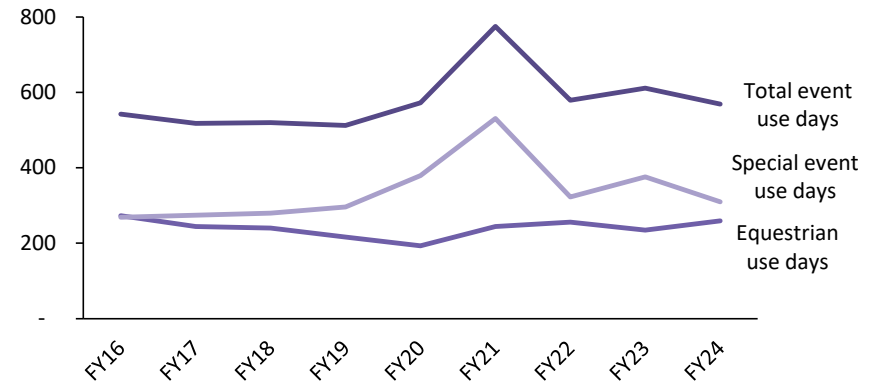
Figure B-3 illustrates the number of use days at WestWorld by event type. Special events consistently account for more use days than equestrian events, despite a similar number of each event type per year. This indicates that special events tend to utilize WestWorld for a greater number of days for each event.

B-2. Total events at WestWorld by event type and fiscal year, FY16–FY24



Source: WestWorld of Scottsdale.

B-3. Total number of use days at WestWorld by event type and fiscal year, FY16–FY24



Source: WestWorld of Scottsdale.

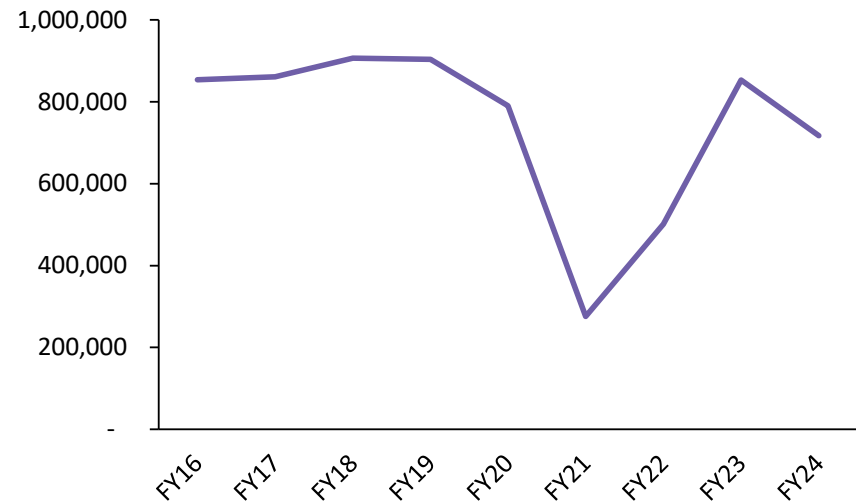
B. Summary of Key Performance Indicators — Attendance

Figure B-4 illustrates annual attendance at WestWorld events by fiscal year. With the exception of a decline in attendance in fiscal year 2021 (due to the effects of the COVID-19 pandemic), attendance at WestWorld typically ranges between 700,000 and 900,000.

Average attendance per event. Figure B-5 illustrates average attendance per event at WestWorld by fiscal year. Observing average attendance allows us to compare the quality of events from year to year as it relates to attendance. Even though the total number of events at WestWorld annually decreased from fiscal year 2017 to fiscal year 2020, the events that did occur had higher attendance numbers on average.

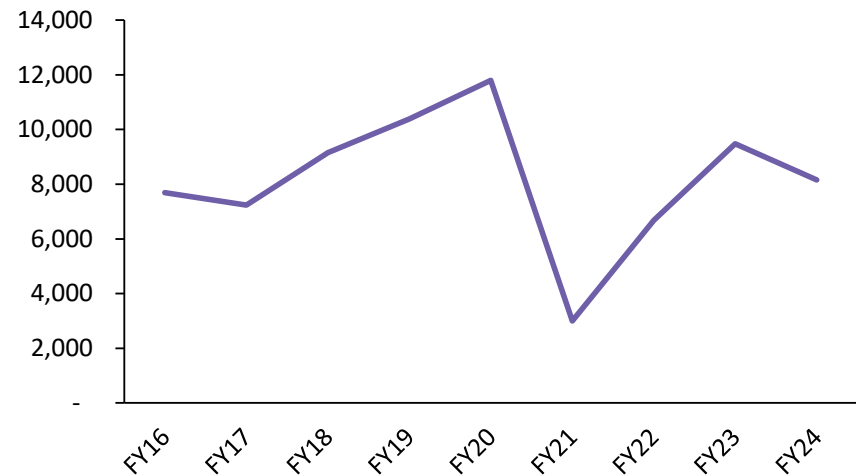
Note that Barrett-Jackson Car Auction and Arabian Horse Show are each considered one event in this calculation and attract 250,000 to 350,000 attendees at each event. Events with more event days have a higher likelihood of greater attendance numbers. To further analyze event attendance and provide a more precise assessment of attendance at each event, we recommend tracking the number of event days to calculate average attendance per event day.

B-4. WestWorld annual attendance by fiscal year, FY16–FY24



Source: WestWorld of Scottsdale.

B-5. Average attendance per event at WestWorld by fiscal year, FY16–FY24



Source: WestWorld of Scottsdale.

B. Summary of Key Performance Indicators — Financials

Keen Independent studied operational expenses for WestWorld from fiscal year 19/20 through fiscal year 23/24. Figure B-6 provides a summary of WestWorld’s operational expenses over the five-year period.

Personnel expenses. Personnel expenses include wages, salaries, benefits and overtime. This does not include expenses for services that have been contracted out to a third party. Personnel expenses have gradually increased as the cost of labor has increased. Although personnel expenses have increased, WestWorld has reduced the number of full-time equivalent (FTE) staff from 33 in fiscal years 19/20 through 22/23 to 31 in fiscal year 23/24.

Net operating income. Net operating income has ranged from a \$1.6 million loss to \$360,000 profit (before debt service expenses) over the five fiscal years studied. Note that the years that show positive net operating income were the fiscal years that were most affected by the COVID-19 pandemic.

City operational subsidy. The net operating income loss and debt service are paid for by the City and therefore considered a subsidy to the operations of WestWorld. The debt service includes debt from past capital expenditures related to the facilities. Part of this debt service (\$1.2 million) is funded by Bed Tax contributions.

B-7. Summary of WestWorld statement of operations, FY19/20–FY23/24

| | FY 19/20 | FY 20/21 | FY 21/22 | FY 22/23 | FY 23/24 |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Facility rental | \$ 2,261,538 | \$ 3,601,497 | \$ 3,675,360 | \$ 3,781,955 | \$ 3,834,129 |
| Other revenue | 2,338,241 | 2,660,848 | 3,760,271 | 3,957,510 | 4,281,724 |
| Total revenue | \$ 4,599,779 | \$ 6,262,345 | \$ 7,435,631 | \$ 7,739,465 | \$ 8,115,853 |
| Personnel services | \$ 2,076,128 | \$ 1,947,387 | \$ 2,318,441 | \$ 2,419,431 | \$ 2,745,065 |
| Contractual services | 2,958,872 | 2,668,119 | 3,267,559 | 3,989,653 | 3,758,989 |
| Other expenses | 1,155,497 | 1,355,728 | 1,488,955 | 1,712,546 | 1,913,302 |
| Total expenses | \$ 6,190,497 | \$ 5,971,234 | \$ 7,074,955 | \$ 8,121,630 | \$ 8,417,356 |
| Net income | \$ (1,590,718) | \$ 291,111 | \$ 360,676 | \$ (382,165) | \$ (301,503) |
| Debt service | \$ 4,363,373 | \$ 3,494,782 | \$ 4,570,462 | \$ 3,591,426 | \$ 3,590,111 |
| One-time repairs | - | - | - | 623,230 | 309,787 |
| Income after debt service and one-time repairs | \$ (5,954,091) | \$ (3,203,671) | \$ (4,209,786) | \$ (4,596,821) | \$ (4,201,401) |

Source: WestWorld of Scottsdale.

B. Summary of Key Performance Indicators — Estimated economic impact

In 2024, the Arizona State University Seidman Research Institute conducted an economic impact study for WestWorld. This study included over 2,000 surveys collected from attendees at 22 equestrian and non-equestrian events held at WestWorld during fiscal year 2024.

Total economic impact. Arizona State University estimated that WestWorld events generated approximately \$163 million in economic impact for the City of Scottsdale in fiscal year 2024. Figure B-8 illustrates the sources of this economic activity.

Transaction privilege tax (TPT) revenue generated. Arizona State University also estimated TPT revenue generated as a result of events taking place at Westworld. Figure B-9 shows that an estimate of about \$4.8 million in TPT revenue was generated by WestWorld events, with about \$4 million specifically being from non-equestrian events, like the Barrett-Jackson Car Auction.

This TPT revenue exceeded the City’s debt service payments for WestWorld in the same year, which totaled about \$3.5 million.

Return on investment. With an operational subsidy of about \$300,000 from the City of Scottsdale in fiscal year 23/24, for every dollar that was subsidized by the City, WestWorld events generated about \$540 dollars.

If the City’s debt service contribution for WestWorld in fiscal year 23/24 is included, then WestWorld generated about \$39 dollars for every dollar subsidized by the City.

B-8. Estimated economic impact of WestWorld on the City of Scottsdale, 2024

| TOTAL IMPACT SOURCE | STATE GDP (Millions \$) ⁵ | EMPLOYMENT (Job Years) ⁶ | LABOR INCOME (Millions \$) ⁷ |
|------------------------------------|---|--|--|
| Participant & Visitor Expenditures | \$116.1 | 1,350 | \$58.5 |
| Event Organizer Expenditures | \$23.7 | 292 | \$16.5 |
| WestWorld Employment & Operations | \$23.8 | 171 | \$10.6 |
| Total Economic Impact | \$163.6 | 1,813 | \$85.6 |

Source: Arizona State University Seidman Research Institute (2024), *The Annual Economic Impact of WestWorld for the City of Scottsdale*.

B-9. Estimated direct TPT revenue impact of WestWorld’s annual events for the City of Scottsdale, 2024

| | Direct Tax Collections (Millions \$) |
|--|---|
| Equestrian Events (including Arabian Horse Show) | \$0.7 |
| Non-Equestrian Events (including Barrett Jackson) | \$4.0 |
| Scottsdale’s State-Shared Allocation of TPT Revenues | \$0.1 |
| Total Direct TPT Revenues | \$4.8 |

Source: Arizona State University Seidman Research Institute (2024), *The Annual Economic Impact of WestWorld for the City of Scottsdale*.

APPENDIX C. Summary of Relevant Plans — Introduction

This appendix provides a summary of plans and ordinances for the City of Scottsdale that include or impact initiatives related to WestWorld and events held at the venue. Information for each document is presented as it was written at the time it was adopted.

Introduction

Keen Independent reviewed the following City plans and documents in the development of the WestWorld Strategic Plan, presented in chronological order:

- City of Scottsdale General Plan 2035 (ratified by voters in 2021);¹
- Scottsdale Tourism & Events Strategic Plan (2023);² and
- City of Scottsdale Organization Strategic Plan (2024).³

These documents collectively provide a foundation for strategic direction, operational values and community aspirations that can inform the vision and strategic direction of WestWorld.

C-1. Horse sculpture at WestWorld



Source: Keen Independent Research.

¹ City of Scottsdale General Plan 2035 (2021), Retrieved July 18, 2025 from https://www.scottsdaleaz.gov/docs/default-source/scottsdaleaz/general-plan/scottsdale-general-plan-2035---executive-summary.pdf?sfvrsn=d7021b0d_1

² Scottsdale Tourism & Events Strategic Plan (2023), Retrieved July 18, 2025 from https://www.scottsdaleaz.gov/docs/default-source/scottsdaleaz/tourism/tourism-strategic-plan-2023.pdf?sfvrsn=f6d5424c_1

³ 2024 Organization Strategic Plan, Retrieved July 18, 2025 from https://www.scottsdaleaz.gov/docs/default-source/scottsdaleaz/mayor-and-council/organization-strategic-plan.pdf?sfvrsn=6daf39a6_7

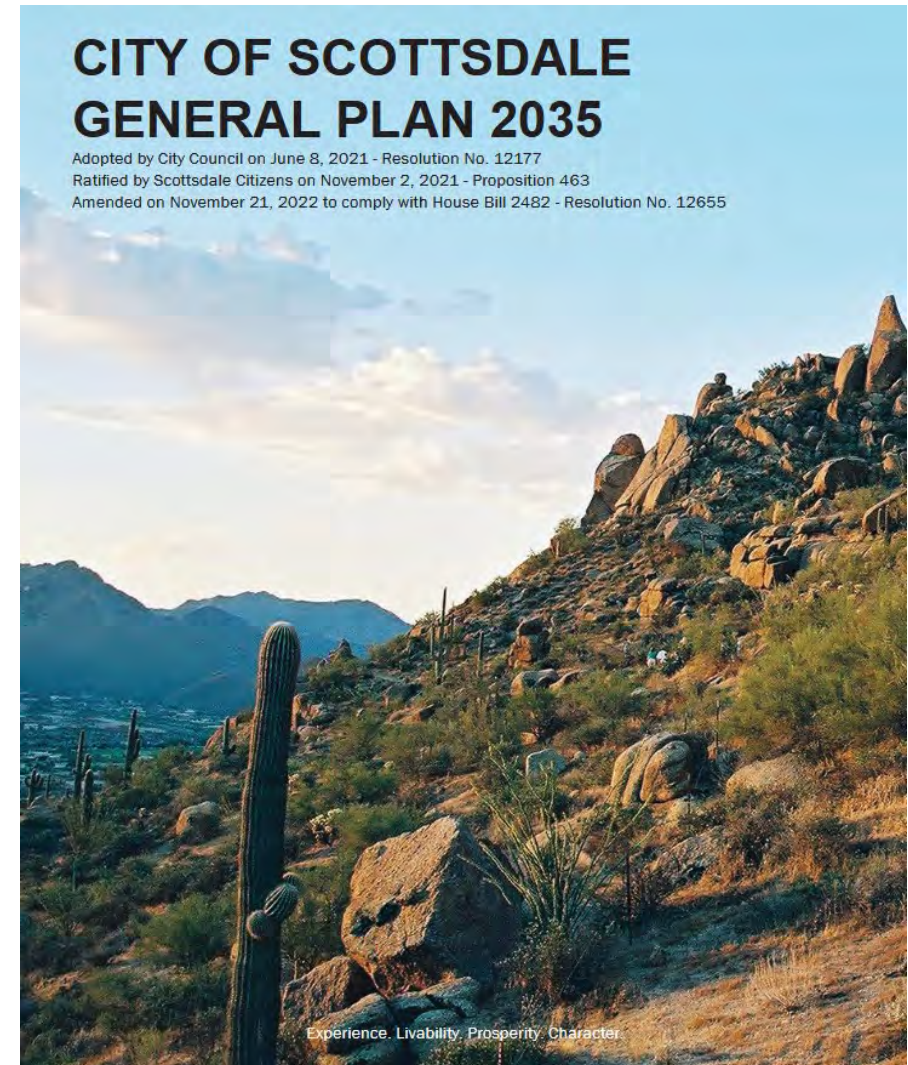
C. Summary of Relevant Plans — City of Scottsdale General Plan 2035

The General Plan 2035 is Scottsdale’s principal long-range planning document, establishing the City’s vision and guiding policy and decision-making through 2035 regarding community character and design, land use, open space and the natural environment, business and economic development, community services, neighborhood vitality, transportation and growth. Shaped by extensive community input and ratified by voters, the plan is organized around core aspirations such as experience, livability, prosperity and character, and outlines goals and policies that provide a framework for development, revitalization and resource stewardship.

The following elements of the General Plan 2035 could be applied to strategic decision making at WestWorld:

- **General Plan vision regarding distinctive character.** The vision statement states that Scottsdale will respect and be sensitive to its history and equestrian legacy. With WestWorld serving as a premier equestrian facility, it continues to serve as a resource for Scottsdale’s equestrian community.
- **Goal CD 7. Honor Scottsdale’s western and equestrian lifestyle.** Although elements of this goal specifically point to development, land use and the Historic Old Town District, WestWorld also contributes to this goal through its support of equestrian events.
- **Goal ACC 2. Build on Scottsdale’s reputation as the regional leader and widely-recognized destination in arts, culture and creativity.** This goal includes an objective to develop partnerships to build regional, national and international tourism and cultural exchange programs. WestWorld’s size, visibility and flexibility can enhance Scottsdale’s role as a regional leader in arts, culture and creativity through these partnerships.

C-2. Cover page of the City of Scottsdale General Plan 2035



Source: City of Scottsdale.

C. Summary of Relevant Plans — City of Scottsdale General Plan 2035

- **Goal T 1. Strengthen Scottsdale’s position as a premier regional, national and international tourism and resort destination.** WestWorld strengthens Scottsdale’s position as a premier tourism and resort destination by serving as a high-impact venue that draws regional, national and international visitors through signature events. Its flexible infrastructure, proximity to luxury resorts and ability to support year-round programming position it as an ideal partner in attracting diverse tourist segments. By expanding its event portfolio to include more signature events and enhancing premium visitor experiences, WestWorld can amplify Scottsdale’s brand, support resort industry partnerships and contribute to the city’s tourism economy and international appeal.

- **Goal T 2. Enhance visitor and resident mobility, accessibility and wayfinding.** Community feedback about WestWorld identified wayfinding and parking as areas of improvement. Directly addressing this community feedback would also be addressing this goal from the General Plan.

- **Goal T 3. Support and expand special events, spaces and venues.** This goal may be able to provide some guidance when making decisions on which events to book when there are conflicting date requests. This goal includes objectives that involve:
 - Building and retaining sporting, western and equestrian events;
 - Maximizing the potential of art and cultural events for generating economic activity, including new, high-quality signature festival events; and
 - Programming to attract residents and visitors.

C-3. Line of cars at Barrett-Jackson Car Auction



Source: Keen Independent Research.

C. Summary of Relevant Plans — Scottsdale Tourism & Events Strategic Plan

Commissioned by the City of Scottsdale in partnership with Experience Scottsdale, the 2023 Tourism & Events Strategic Plan outlines a five-year roadmap to advance Scottsdale’s position as a premier travel and events destination. It incorporates insights from resident and visitor surveys, stakeholder interviews, market analyses and benchmarking against peer destinations. The plan emphasizes sustainable tourism, community well-being, destination branding, event development and infrastructure investment.

The following elements of the Tourism & Events Strategic Plan could be applied to strategic decisions for WestWorld:

- **Strategy FE.2. Improve and diversify WestWorld’s hosting capacities.** This strategy indicates that performance metrics for WestWorld should be more in line with performance metrics of other convention and event facilities throughout the nation, with a focus on hosting larger events that attract attendees from a wider area and generate more room nights in Scottsdale.
- **Strategy FE.1. Increase the positive impact of existing events and attract new year-round events.** This strategy encourages the addition of a world-renowned indoor signature event as well as focusing on events that increase hotel stays, particularly during the summer. WestWorld is well positioned to support this goal with its indoor event spaces.
- **Strategy PE.4. Position and market Scottsdale as a premier luxury destination.** This Plan emphasizes the importance of aligning both the product and marketing with changing consumer behaviors to anchor Scottsdale as a premier luxury destination. This can be used to guide event booking decisions at WestWorld when there are conflicting date requests.

C-4. Cover page of Scottsdale Tourism & Events Strategic Plan



Source: City of Scottsdale.

C. Summary of Relevant Plans — Scottsdale Tourism & Events Strategic Plan

- **Strategy CW.2. Focus on community quality of life.** The Plan states that monitoring resident perceptions and priorities about tourism and its impact on quality of life is critical to informing how Scottsdale is managed as a destination. WestWorld can contribute to this monitoring when evaluating programming and visitor experience, while also being mindful of any comments from residents in the surrounding area.
- **Target audiences.** The Plan identified four key target audiences that have the greatest future market potential for Scottsdale:
 - **Active adventurers.** Individuals with an interest in outdoor sports, nature, health and fitness activities fall within this category.
 - **All-in enthusiasts.** This includes visitors who are interested in a wide variety of activities as they have many different motivations for their travel and vacations. Shopping, nightlife and attending events are most preferred by All-in Enthusiasts compared to other types of travelers.
 - **Bleisure travel.** Bleisure, or “business and leisure travel,” refers to travelers that extend work trips (i.e., conferences, meetings and staff retreats) to include leisure time before or after the event.
 - **Conferences and meetings.** This includes individuals visiting Scottsdale for professional-related events, such as conferences and meetings.

When booking events with a focus on maximizing tourism, WestWorld could consider these target audiences as potential event attendees.

C-5. Temporary stage set up for Arizona Bike Week



Source: Keen Independent Research.

C. Summary of Relevant Plans — City of Scottsdale Organization Strategic Plan

The City of Scottsdale’s Organization Strategic Plan provides a tactical roadmap for implementing the broader General Plan goals. Developed by City leadership, this plan articulates the City’s near-term priorities by outlining detailed action items, responsible departments and timelines. The plan is structured around key strategic goals, such as environmental conservation, economic vitality, community engagement and cultural preservation. Each section includes measurable outcomes and assigns accountability to specific City divisions.

The goals from this plan that could be relevant to WestWorld operations include:

- **F. Revitalize responsibly.** Goals include managing noise and neighborhood impacts, which are issues that intersect with WestWorld’s operations in terms of event impact on surrounding areas.
- **G. Advance innovation and prosperity.** Goal G2 calls to "comprehensively market city-owned tourism and event facilities," including WestWorld. Recommended actions include enhancing the venue’s digital presence, improving brand awareness and strengthening venue visibility.

C-6. Lounge at the Arabian Horse Show



Source: Keen Independent Research.

Appendix D. Community Feedback – Introduction and methodology

Keen Independent administered a survey for Scottsdale and Phoenix-metro area community members, as well as WestWorld patrons, to gather input for the WestWorld’s Strategic Plan.

Distribution

The survey was promoted on WestWorld’s social media, including Instagram and Facebook. The study team also conducted direct outreach to community groups, such as car enthusiasts, equestrian enthusiasts and Scottsdale homeowner associations. The survey was open from January 25 to May 31, 2025.

The study team also developed an abbreviated version of the survey to collect intercept responses from attendees to the Barrett-Jackson Car Auction and Arabian Horse Show at WestWorld. A QR code linking to the survey was displayed on A-frame signs at these WestWorld events. Respondents were given a matchbox car as a thank you for their participation.

Additionally, Keen Independent gathered feedback from WestWorld facility staff and City of Scottsdale employees about their experiences at the facility. Their feedback to questions that aligned with the community and patron-focused survey is also included in this appendix.

Participation

In total, this survey collected 599 responses. The survey for facility staff members and City of Scottsdale employees collected 31 total responses. All questions asked in these surveys were optional. Both completed and partial surveys are included in the analysis, as many partial responses contained substantive feedback.

Quotes from Participants

Selected quotes are included in this appendix to illustrate themes the study team found during analysis of survey participant input. Participants were informed that their responses would be analyzed in aggregate and that no individually identifying information would be reported. Quotes are attributed in a non-individually identifying manner, such as “Scottsdale resident” or “Out-of-town visitor.”

Topics

The survey analysis in this appendix reflects the perspectives of approximately 600 respondents and is organized by the following topics:

- Introduction and methodology;
- Demographics;
- Affiliations and residencies;
- Reasons for not visiting;
- Recent attendee experiences;
- Facility feedback;
- Opportunities for success; and
- Preferences and priorities.

Online Reviews

Keen Independent also analyzed Google reviews posted between April 15, 2024 to April 15, 2025 to gather additional insights into visitor experiences and perceptions of WestWorld.

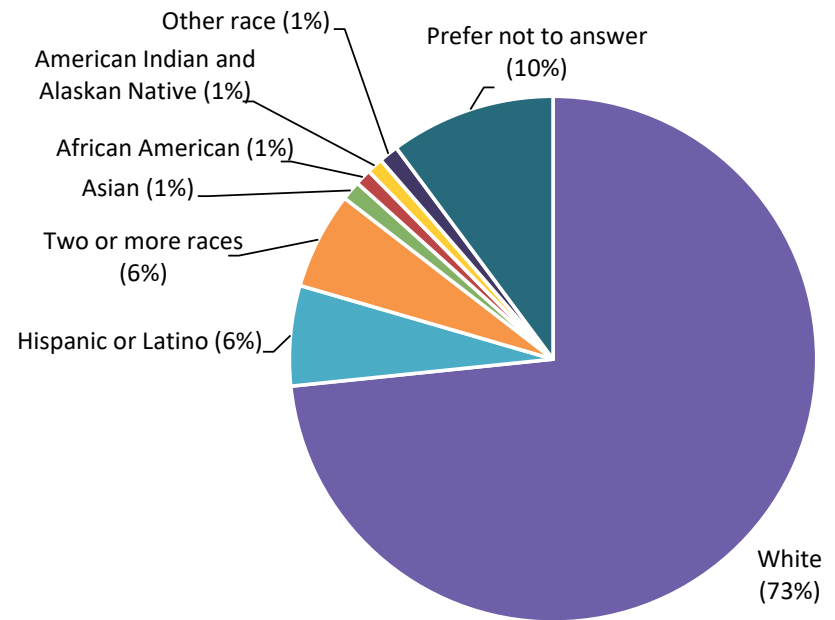
D. Community Feedback – Demographics

Keen Independent examined the survey participants' demographic information, including race, ethnicity, gender, age, residency and affiliation with WestWorld.

Race and Ethnicity

Figure D-1 shows the race and ethnicity of survey participants. Of the survey participants who responded about their race and ethnicity, 73 percent identified as white, 6 percent identified as Hispanic or Latino and 6 percent identified as two or more races.

D-1. Race and ethnicity of survey participants



Note: N=503. Participants could also select Native Hawaiian/Pacific Islander as a response.

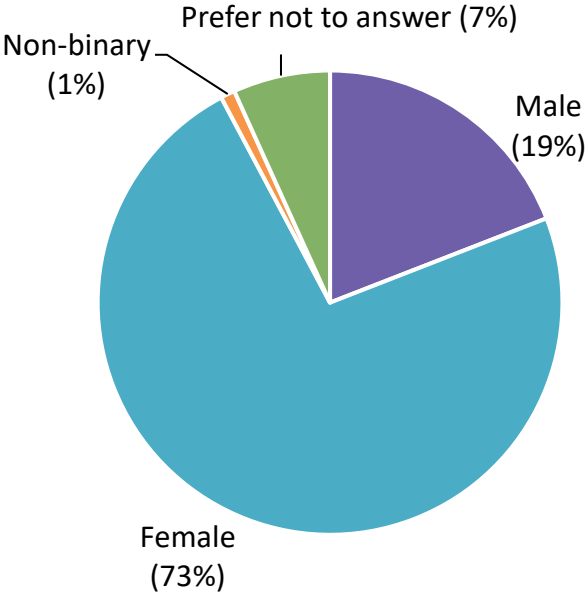
Source: Keen Independent Research.

D. Community Feedback – Demographics

Gender

Figure D-2 shows that nearly three-quarters of participants identified as female (73%) and almost one-fifth identified as male (19%). The remaining participants either preferred not to answer (7%) or chose non-binary (1%).

D-2. Gender of survey participants



Note: N=503.
Source: Keen Independent Research.

D. Community Feedback – Demographics

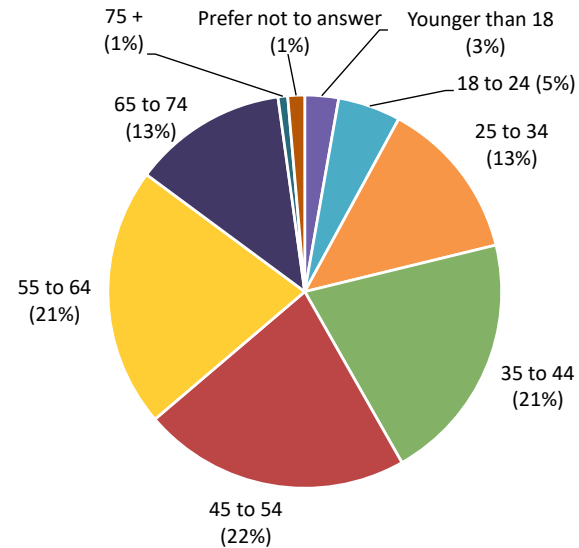
Age

Figure D-3 depicts the ages of individuals who completed the survey. Survey participants represented a broad age range. Just over 60 percent were between the ages of 35 and 64, with the largest group (22%) in the 45 to 54 age bracket. An additional 13 percent were ages 25 to 34, and 14 percent were 65 or older.

Household Ages

Respondents reported a range of household age groups (Figure D-4). Twenty-five percent indicated that their household includes a person 12 or younger, and the same percentage reported a household member age 45 to 54. Just under 25 percent reported having someone 35 to 44 or 55 to 64 in their household. Nine percent indicated that they were the sole member of their household.

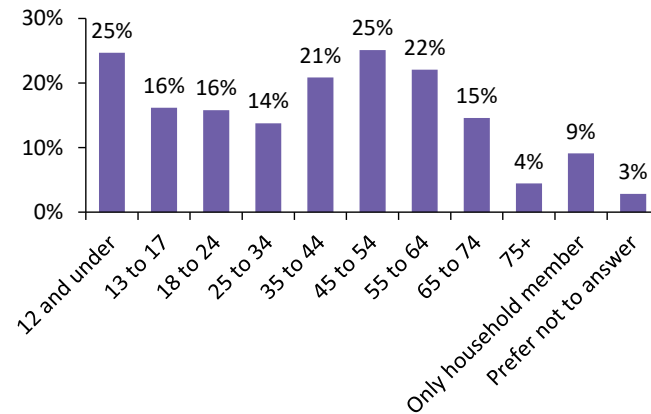
D-3. Age of survey participants



Note: N=505.

Source: Keen Independent Research.

D-4. Reported ages of other members of survey participants' household



Note: N=494. Participants could select more than one answer.

Source: Keen Independent Research.

D. Community Feedback – Demographics

Other Demographic Identifiers

Keen Independent invited survey participants to share any additional demographic identifiers that could help the study team better understand their experiences or those of other members of their household. A total of 121 participants provided additional identifiers, including disability status, veteran/military status, LGBTQ+ identity, bilingual/multilingual ability or other categories. Respondents could select multiple options. Figure D-5 shows the demographic self-identification of respondents.

D-5. Demographic self-identification of survey participants or their household members

| Other demographic identifiers | Number of responses | Percent |
|-------------------------------|---------------------|---------|
| Veteran/military | 57 | 28 % |
| Disability status | 28 | 11 |
| Bilingual/multilingual | 20 | 8 |
| LGBTQ+ | 19 | 8 |
| Other | 5 | 2 |

Note: N=253. Prefer not to answer is excluded. Participants could select more than one answer.

Source: Keen Independent Research.

D. Community Feedback –Affiliations and residencies

Survey participants were asked to share information about their interests, residency and affiliation with WestWorld.

Residency and Interests

Survey participants shared information about their WestWorld-related interests and residencies (Figure D-6). For interests, most survey participants identified as equestrian enthusiasts, while a quarter of respondents identified as outdoor or rodeo enthusiasts. Just under 100 participants identified as athletes or car enthusiasts.

About half of participants identified as Phoenix metro area residents and about one-quarter of identified as City of Scottsdale residents. Four respondents identified as both Scottsdale residents and Phoenix metro area residents. Seventy respondents identified as out-of-town visitors, with 34 residing elsewhere in Arizona and 34 visiting from out of state.

These data indicate that most perspectives in this appendix come from Phoenix and Scottsdale residents (73%), and from individuals with interests in equestrian and/or rodeo disciplines (92%).

D-6. Participant residency and relevant interests

| I am a/an... | Number of responses | Percent |
|-----------------------------|---------------------|---------|
| Equestrian enthusiast | 405 | 68 % |
| Phoenix metro area resident | 279 | 47 |
| Outdoor enthusiast | 157 | 26 |
| City of Scottsdale resident | 154 | 26 |
| Rodeo enthusiast | 143 | 24 |
| Business owner | 107 | 18 |
| Athlete | 99 | 17 |
| Car enthusiast | 84 | 14 |
| Out-of-town visitor | 70 | 12 |
| Artist or creative | 38 | 6 |
| None of the above | 5 | 1 |

Note: N=595. Participants could select more than one answer.

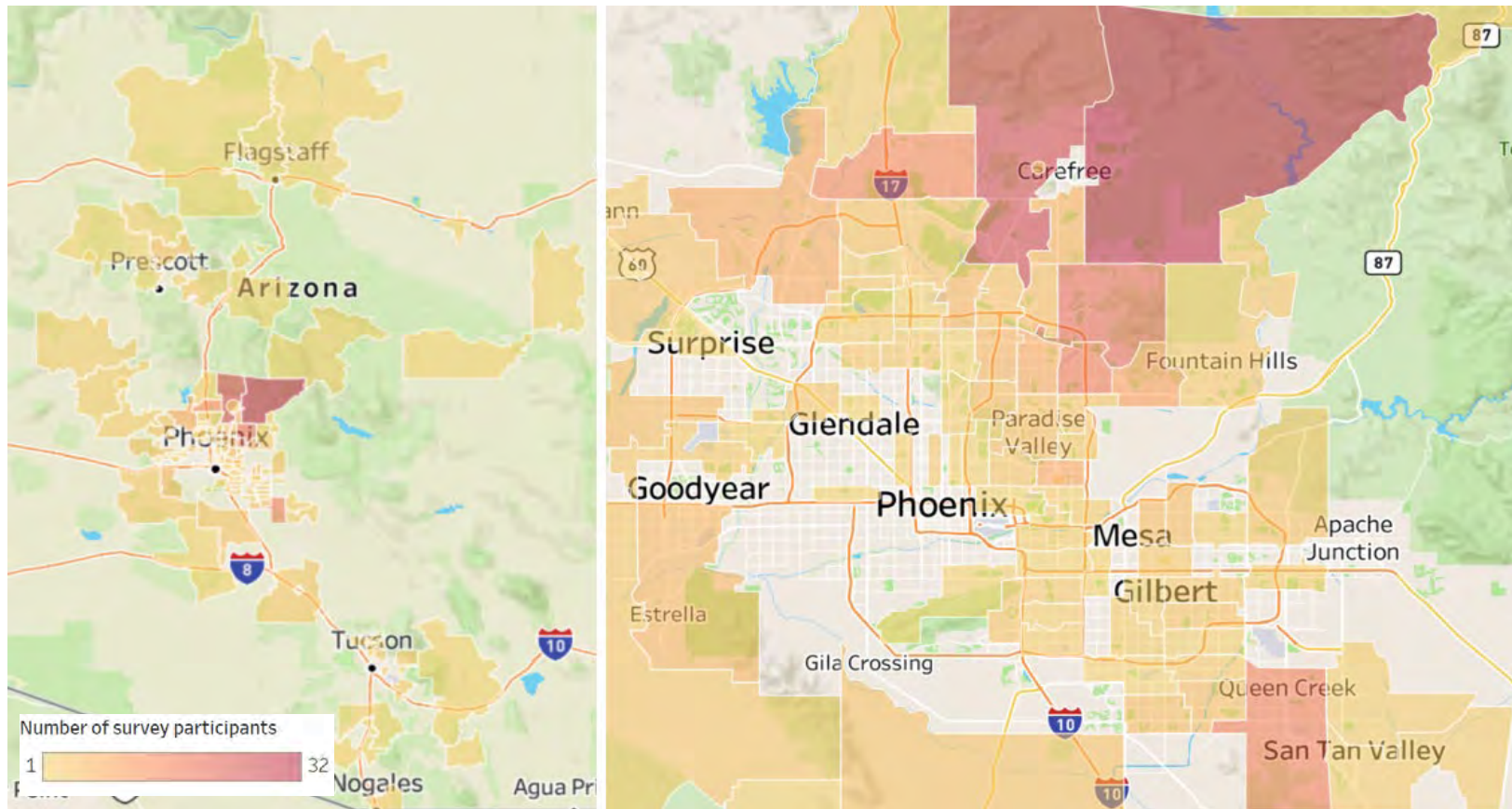
Source: Keen Independent Research.

D. Community Feedback –Affiliations and residencies

ZIP Code Mapping

ZIP Code data was used to develop a heat map of respondent locations. Figure D-7 depicts participants who live in Arizona, as well as those concentrated in the Phoenix metro area. This map shows that WestWorld attracts participants from across Arizona, but most respondents live in or near Scottsdale.

D-7. Reported location of survey participants



Note: N=586.

Source: Tableau, Keen Independent Research.

D. Community Feedback –Affiliations and residencies

Affiliation with WestWorld

Figure D-8 depicts survey participants’ affiliations with WestWorld. Three-quarters reported attending events at the venue and about half were exhibitors or performers at WestWorld. Ten percent of respondents said that they had no affiliation with WestWorld.

D-8. Survey participants reported affiliations with WestWorld

| Affiliation with WestWorld | Number of responses | Percent |
|--|---------------------|---------|
| WestWorld event attendee | 400 | 77 % |
| WestWorld event exhibitor or performer | 256 | 47 |
| WestWorld contractor or vendor | 21 | 4 |
| City of Scottsdale employee (not at WestWorld) | 5 | 1 |
| Other | 13 | 5 |
| No affiliation to WestWorld | 51 | 10 |

Note: N=517. Participants could select more than one answer.

Source: Keen Independent Research.

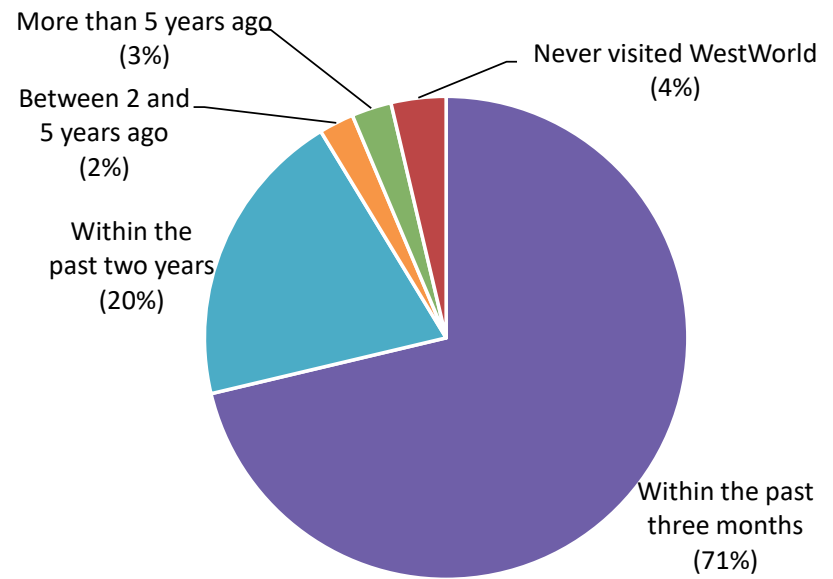
D. Community Feedback – Affiliations and residencies

Most Recent Attendance to WestWorld

Nearly three-quarters of survey respondents had visited WestWorld within the past three months, while 20 percent had visited within the last two years. Figure D-9 shows all attendance shared by survey participants.

With more than 90 percent of survey respondents having visited WestWorld within the last two years, most of the feedback shared in this appendix reflects recent experiences at the venue. It is also possible that individuals with more recent visits were more likely to complete the survey.

D-9. Participants most recent attendance to WestWorld



Note: N=599.

Source: Keen Independent Research.

D. Community Feedback – Reasons for not visiting

Survey respondents who had not visited WestWorld within the past two years were asked why they had not visited recently and what might encourage them to visit in the future.

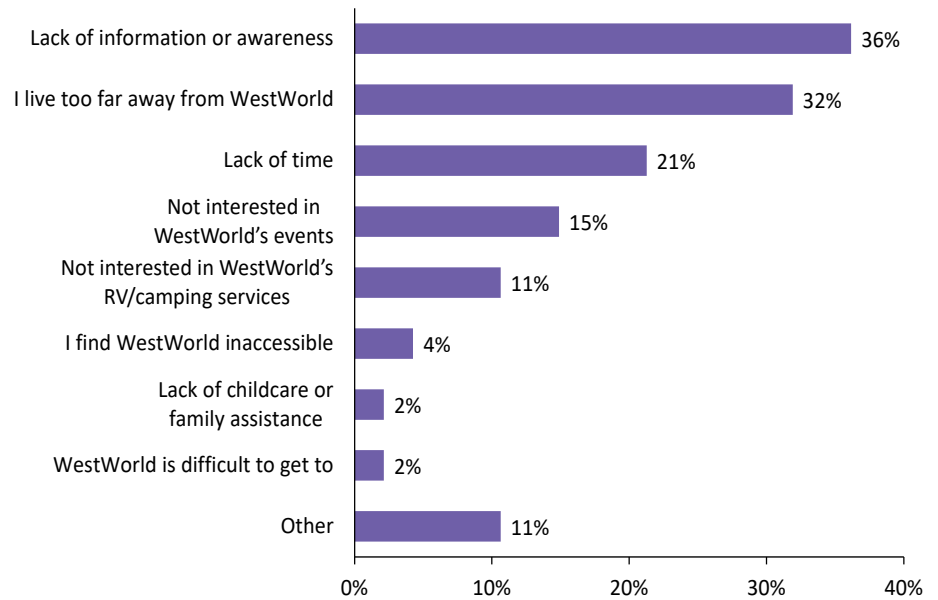
Reasons For Not Visiting WestWorld

As depicted in Figure D-10, among respondents who had not visited WestWorld within the last two years, the most commonly reported reasons were lack of information or awareness (36%) and distance from the venue (32%). Other common barriers to visitation included lack of time (21%) and disinterest in WestWorld’s events (15%) or camping services (11%).

Encouraging Future Visitation

When asked what might encourage future visits to WestWorld, most of the thirty-two respondents elaborated on the events that they would like to attend. Many participants called for additional equestrian events, while others also suggested expanding to include more car shows, dog events, markets, festivals or concerts. Six respondents indicated that WestWorld could be doing better advertising, and four respondents said that WestWorld should be more affordable.

D-10. Reasons for not visiting WestWorld



Note: N=47. Participants could select more than one answer.

Source: Keen Independent Research.

Host more of the smaller shows and horse events.

Out-of-town visitor

Hold dog events the way they used to.

Phoenix metro-area resident

More information/advertising.

Phoenix metro-area resident

Be open and financially accessible.

Out-of-town visitor

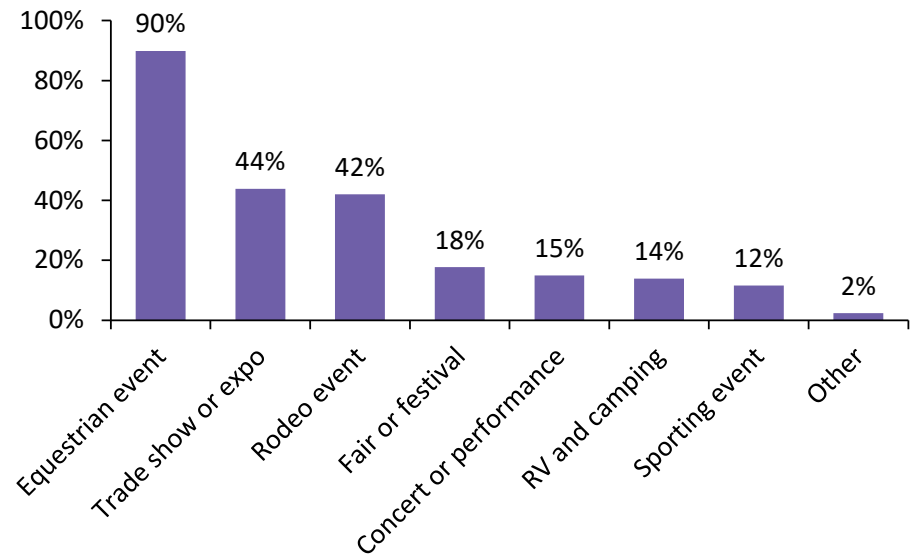
D. Community Feedback – Recent attendee experiences

Survey participants who reported visiting WestWorld within the last two years were asked a series of questions about their experiences recently attending events at WestWorld.

Recently Attended Events

When asked what events participants had recently attended, the majority of respondents (90%) reported that they had attended an equestrian event. Just under half of respondents reported having attended a trade show or expo or a rodeo event. Figure D-11 shows the full range of events that recent participants reported that they attended at WestWorld.

D-11. Recently attended events at WestWorld



Note: N=474. Participants could select more than one answer.

Source: Keen Independent Research.

D. Community Feedback – Recent attendee experiences

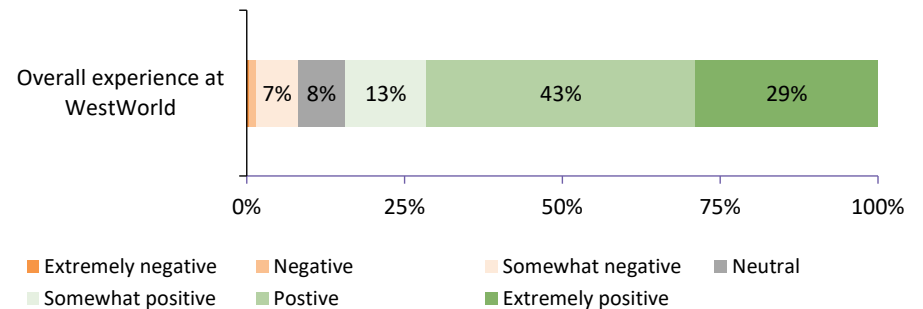
Overall Experience

Figure D-12 shows that over three-quarters of recent attendees reported a somewhat positive to extremely positive experience at WestWorld.

Net rating. Using a modified Net Promoter Score framework, responses were condensed by excluding the neutral option and categorizing the remaining responses into positive or negative sentiments. The net rating is calculated by subtracting the percentage of negative sentiments from positive sentiments. This scoring method provides a clear measure of overall agreement or disagreement to a statement. In the accompanying graphs, a positive net rating indicates a higher proportion of positive responses, while a negative net rating indicates greater levels of disagreement. Figure D-13 shows the net score for overall experience at WestWorld is 76.

While a net score of 76 is strong, WestWorld could consider tracking this rating as a key performance indicator to monitor future changes in this score.

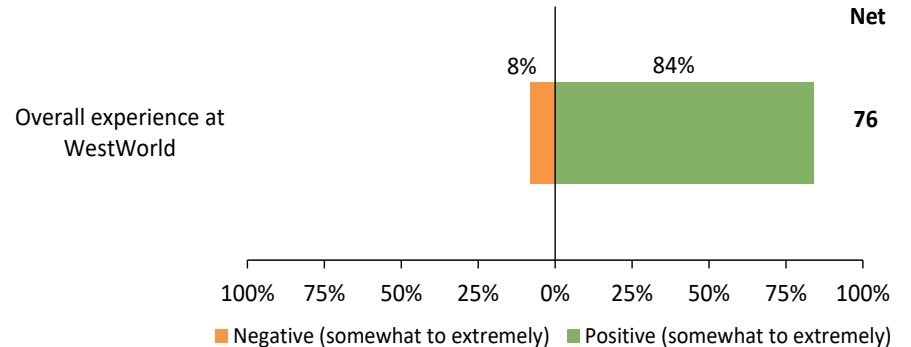
D-12. Survey participant overall experience ratings



Note: N=506. Percentages are rounded to the nearest whole number and therefore may not sum to 100. Includes responses from facility staff and City employees.

Source: Keen Independent Research.

D-13. Survey participant overall experience rating net score



Note: N=506. Includes responses from facility staff and City employees.

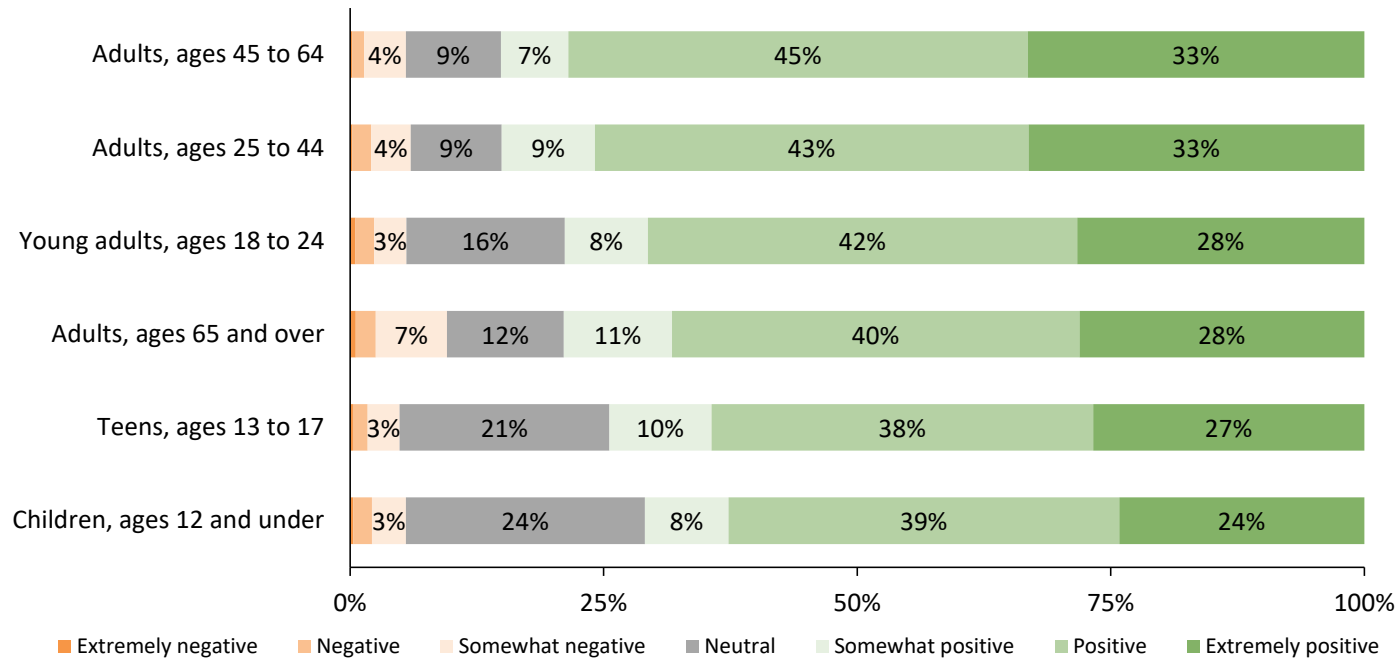
Source: Keen Independent Research.

D. Community Feedback – Recent attendee experiences

Age-specific Experience

Survey participants were asked to rate the overall experience of events for specific age groups. Figure D-14 shows all responses along a seven-point scale ranging from “extremely negative” to “extremely positive.” Participants reported events being most positive for adults ages 45 to 64 and ages 25 to 44, with over 80 percent of responses being “extremely positive,” “positive” or “somewhat positive.” All age groups received at least 70 percent of positive-leaning responses.

D-14. Age-specific experiences



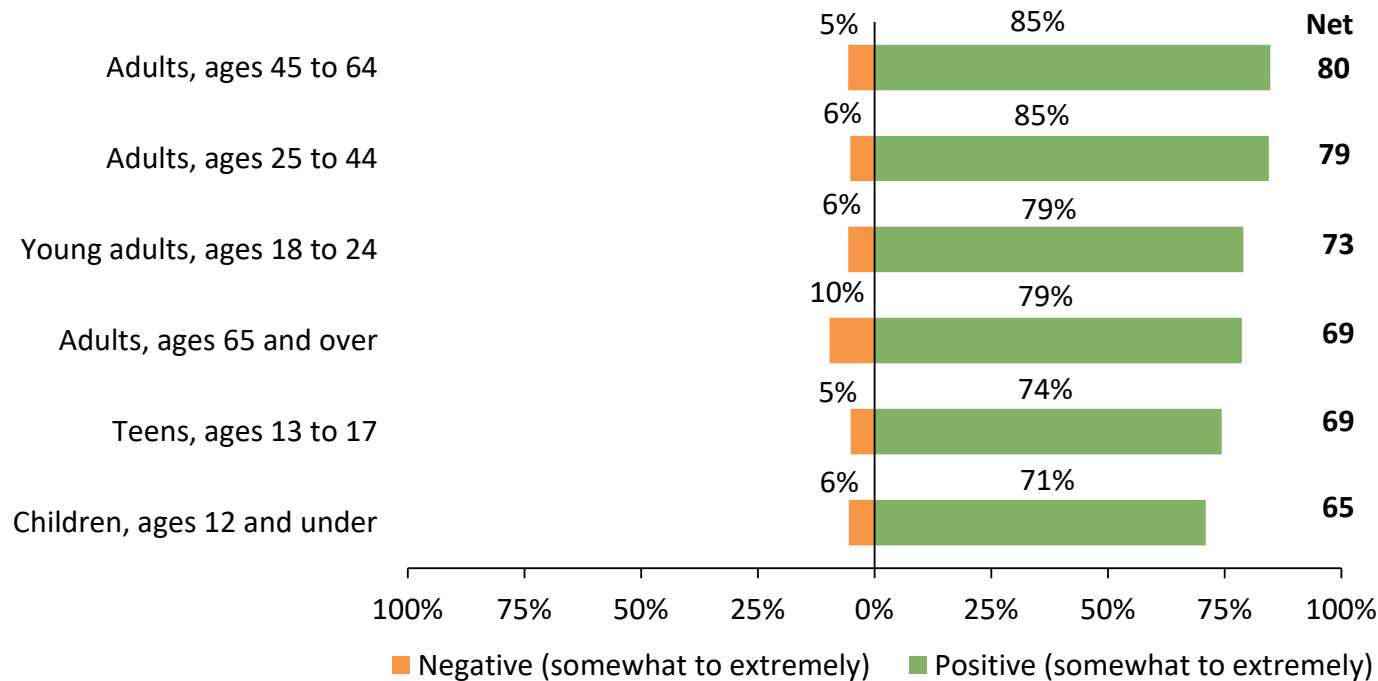
Note: N=327-437. NA or I Don't Know responses are excluded. Percentages are rounded to the nearest whole number and therefore may not sum to 100. Includes responses from facility staff and City employees.

Source: Keen Independent Research.

D. Community Feedback – Recent attendee experiences

Net rating. Figure D-15 highlights the net rating for the same age-specific experience questions as Figure D-14. The overall experience net rating was highest for adults ages 45 to 64 and 25 to 44, with ratings of 80 and 79 respectively. The overall experience rating was lowest for children ages 12 and under, with a rating of 65.

D-15. Age-specific experience net ratings



Note: N=327-437. NA or I Don't Know responses are excluded. The net rating is calculated by subtracting the sum of the "strongly negative," "negative," and "somewhat negative" responses from the sum of the participants who said "extremely positive," "positive," and "somewhat positive." Includes responses from facility staff and City employees.

Source: Keen Independent Research

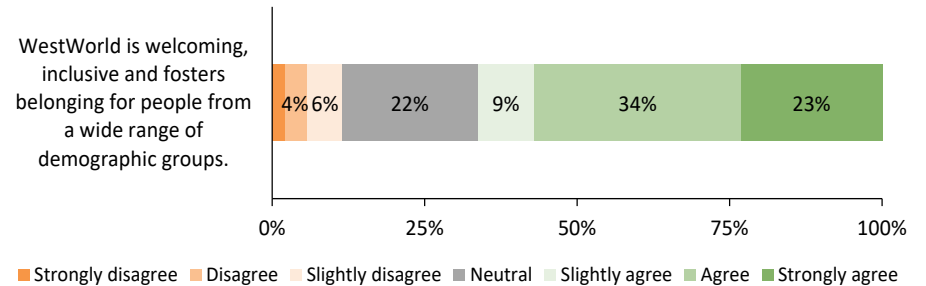
D. Community Feedback – Recent attendee experiences

Inclusivity

Recent WestWorld attendees were asked about their level of agreement with the statement, “As a venue, WestWorld is inclusive and fosters belonging for people from a wide range of demographic groups.” WestWorld staff and City of Scottsdale employees were asked to respond to the statement, “As a venue, WestWorld is welcoming for people from a wide range of demographic groups.” Figure D-16 shows that over half of respondents (66%) slightly to strongly agreed that WestWorld is inclusive and fosters belonging. About one quarter of respondents were neutral on this topic.

Net rating. Figure D-17 shows that WestWorld has an inclusivity net rating of 55. Respondents’ reasons for viewing WestWorld as inclusive or not inclusive are detailed on the following page.

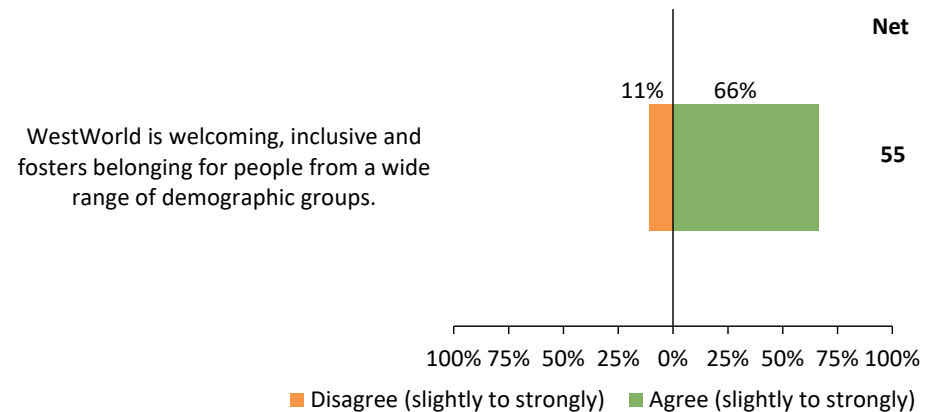
D-16. Survey participant inclusivity agreement



Note: N=463. NA or I Don’t Know responses are excluded. Percentages are rounded to the nearest whole number and therefore may not sum to 100. Includes responses from facility staff and City employees.

Source: Keen Independent Research.

D-17. Survey participant inclusivity agreement net score



Note: N=463. NA or I Don’t Know responses are excluded. The net rating is calculated by subtracting the sum of the “strongly disagree,” “disagree,” and “slightly disagree” responses from the sum of the participants who “strongly agree,” “agree,” and “slightly agree.” Includes responses from facility staff and City employees.

Source: Keen Independent Research.

D. Community Feedback – Recent attendee experiences

How WestWorld is inclusive. Respondents who shared reasons as to why WestWorld is inclusive defined inclusivity in various ways. Many indicated that they thought of WestWorld as welcoming to a range of ages and backgrounds, as well as aficionados of different event activities. They also talked about the diversity of events that WestWorld offers and how that attracts people from different walks of life.

Several respondents shared that WestWorld is ADA accessible and easy to get around. Other respondents described inclusivity in terms of WestWorld being a public place that anyone is welcome to attend if they so desire.

How WestWorld is exclusive. Respondents who viewed WestWorld as not inclusive reported economically inaccessibility for exhibitors, performers and spectators. Some respondents said WestWorld prioritizes larger, high-revenue events like Barrett-Jackson over smaller groups, especially smaller equestrian organizations.

Respondents also stated that the price to attend an event is expensive, particularly the parking and concessions. Some equestrian enthusiasts indicated that WestWorld is not meant to be inclusive, as it should be prioritizing the equestrian events that the facility was designed to showcase. Several respondents reported that WestWorld events cater to a white and wealthy crowd.

A few noted that WestWorld could be more physically accessible to people with disabilities and older audiences, such as adding seating and shade, as well as limiting distance walking.

All the events I've attended at WestWorld have been inclusive regardless of age, race, gender or disability.

Out-of-town visitor

At the horse shows, there are people from many different cultural and economic backgrounds.

Out-of-town visitor

ADA accommodations seem to be very present from parking to inside the Equidome.

Phoenix metro-area resident

[The] public is welcome. [The] public is diverse.

Scottsdale resident

WestWorld has become punitive in its policies towards equine events. It's clear that only big dollar events are welcome.

Phoenix metro-area resident

I don't view WestWorld as meant to be inclusive of all, but rather built to accommodate and host equine events at its core.

Equestrian enthusiast

The biggest events have a conservative / white majority vibe (i.e. Barret- Jackson, Arabian Show, RV & Boat & Home shows).

Phoenix metro-area resident

Seating could be improved to accommodate those with disabilities.

Scottsdale resident

D. Community Feedback – WestWorld strengths and areas for improvement

Survey participants offered positive and constructive feedback about the WestWorld facility and programming.

Strengths

Survey participants were asked to share their thoughts on WestWorld’s greatest strengths.

Facilities and their amenities. Many survey respondents stated that WestWorld’s facilities and associated amenities were their greatest strength. Most echoed that the facilities are excellent for equestrian purposes, including the stables, barns and covered arenas. Participants indicated that they appreciated that there were both indoor and outdoor facilities and that the indoor area is climate controlled. Respondents also reported that the facilities are flexible for many different kinds of events.

Venue size. Many survey respondents remarked on the large size of the WestWorld venue. They stated that the venue’s expansive space allows for big events, and it can accommodate multiple types of events concurrently. Respondents noted that the venue does not feel too crowded because of its size. Although it is a large venue, some respondents added that WestWorld is walkable and easy to navigate.

Venue location. Survey respondents indicated that WestWorld’s location is one of its greatest strengths. Participants described the facility’s location as convenient, with easy highway access and its proximity to metropolitan areas.

The facilities for equestrian events are world class.

Phoenix metro-area resident

Very good stabling; Covered arenas permit shows to go on in the rain; Air-conditioning in the indoor spaces permit shows to be held even in summer.

Equestrian enthusiast

[There is] infrastructure with [the] ability to host lots of people and horses. [They have] convertible buildings that can host different events.

Scottsdale resident

[WestWorld is] a well laid-out facility with plenty of room for parking, exhibitors and spectators.

Phoenix metro-area resident

[WestWorld has] the room to attract and host all kinds of equestrian events and big equestrian names worldwide (if it so desired!).

Scottsdale resident

The facility/grounds itself are not hard to manage or walk around.

Scottsdale resident

The location is fantastic for all types of events and for visitors to enjoy our local shopping and dining.

Phoenix metro-area resident

Its incredible location with the McDowell Mountains as a backdrop. It is easy to find [and] close to major roadways.

Phoenix metro-area resident

D. Community Feedback – WestWorld strengths and areas for improvement

Event offerings. Survey participants indicated that they appreciated WestWorld’s events. Some said that the facility offers a diverse range of programming, while others specifically discussed WestWorld’s horse-related programming, including equestrian and rodeo shows.

Cleanliness and grounds maintenance. Survey respondents remarked that the WestWorld facility is clean and overall well-maintained. Some respondents specifically noted clean restrooms.

Parking. Some respondents indicated that they appreciated not having to worry about parking when attending WestWorld events. They said that parking at WestWorld is expansive and having onsite RV hook-ups is especially useful for horse shows.

[WestWorld] has a wide range of activities for all.

Phoenix metro-area resident

The horse shows have great competition and are some of the best in the state.

Out-of-town visitor

[WestWorld has] large, clean facilities and well-kept arenas.

Equestrian enthusiast

[WestWorld has] gorgeous arenas [and] prompt and excellent groundskeeping for horse shows.

Phoenix metro-area resident

Beautiful grounds.

Out-of-town visitor

RV parking for horse shows.

Phoenix metro-area resident

Easy parking.

Scottsdale resident

D. Community Feedback – WestWorld strengths and areas for improvement

Community. Some respondents talked about community being a strength of WestWorld. Participants indicated that they liked that WestWorld is a local gathering place that hosts unique events. Some described the venue as welcoming, friendly and family-oriented. Other respondents said that WestWorld is supportive of the equestrian community, culture and history. A few respondents reported that WestWorld supports the economic well-being of the surrounding community.

Staff and venue management. Some survey respondents said that WestWorld’s staff and management are a great strength. These individuals described events being well-organized and responsive to exhibitors. They also noted that the maintenance team does a great job.

[WestWorld’s] ability to bring together the community and host many events.

Phoenix metro-area resident

Westworld has always provided an opportunity for people to gather and experience events they may not normally attend.

Phoenix metro-area resident

[WestWorld’s] ability to hold any equestrian event and bring people from around the world to our state just through horses.

Phoenix metro-area resident

Events seem to be well-planned out and ran efficiently.

Phoenix metro-area resident

People within [WestWorld are] really nice and helpful.

Phoenix metro-area resident

Feels well-managed.

Scottsdale resident

D. Community Feedback – WestWorld strengths and areas for improvement

Areas for Improvement

Survey participants were asked to share their thoughts on WestWorld’s greatest areas for improvement.

Commitment to the equestrian community. When asked about areas for improvement, some respondents called for a stronger commitment to horse-related programming, including equestrian and rodeo events. As a facility specifically designed to host these types of events, participants stated that WestWorld has over time made it harder for smaller equestrian events to book at the venue due to cost and date availability. Respondents also expressed interest in more variety in equestrian events, such as more dressage and hunter/jumper events. Some respondents indicated that equestrian programming should be the venue’s highest priority.

Improved footing. Equestrian enthusiasts discussed issues with arena footing. Some respondents reported that the footing is too slick and too hard for many equestrian disciplines to compete. Respondents reiterated that this is dangerous for the horses and riders and suggested that inadequate footing keeps the venue from hosting large-scale hunter/jumper or rodeo events. Some participants reported that out-of-state competitors are no longer attending events due to this issue.

Affordability. Survey participants stated that overall affordability should be an area for improvement for WestWorld. Some respondents suggested lowering ticket and concession prices. Others reported that they wanted more affordable options for exhibitors to hold or take part in events, and they suggested different tiers of pricing for local or smaller organizations hoping to use WestWorld. Some participants reported that they were against the requirement for equestrian exhibitors to buy shavings from the venue. Several participants described a perception that WestWorld prioritizes large, revenue-generating events over smaller organizations.

Encourage and support the horse community to make these events the priority, since this is what Westworld was created for.

Phoenix metro-area resident

Working with smaller equestrian associations to keep pricing and availability affordable.

Equestrian enthusiast

Provide more opportunities for hunter jumper events so folks can show locally and not have to travel to CA.

Phoenix metro-area resident

The footing for horses is often dangerously slick.

Out-of-town visitor

For hunter/jumper horses, the footing in the rings is too hard [and] requires too much water to be safe and comfortable for horses.

Scottsdale resident

To attract high-end equine events that are just not western-focused, people will only bring their expensive horses if the footing will not create injuries for [their] very expensive horses.

Scottsdale resident

[WestWorld] needs to lower the cost to put on and attend events.

Phoenix metro-area resident

Having food and alcohol catered through Westworld, and at a hefty price tag at that, has limited clubs' ability to have fun community events. The costs of hosting have also continued to go up

Scottsdale resident

D. Community Feedback – WestWorld strengths and areas for improvement

Parking and wayfinding. Survey participants stated that they recommend upgrades to parking, traffic flow and wayfinding. Some reported that they want the parking lot to be paved so that it is easier for driving and walking. They noted that paving would also create less dust and improve the cleanliness of the venue. There were a few suggestions for taxi or transportation services within the parking lot to improve accessibility. Others indicated that they want WestWorld to provide better wayfinding, including support for traffic flow at big events and more signage for walking around the venue. Improved signage and traffic support may be especially useful when multiple events occur simultaneously.

Landscaping and shade. Participants suggested more landscaping to improve the venue’s appearance and provide additional shade for attendees, which is particularly important in the summer heat. Some participants said that the WestWorld facility looks desolate compared to other equestrian areas they have visited.

Food and beverage. Participants said that WestWorld could improve their food and beverage quality. Respondents requested more food vendor options, including healthier and locally sourced choices. Some respondents also suggested that the expense of food and beverage options is prohibitive to small groups holding events at the venue.

Trailer parking lot is full of huge pot holes and difficult to maneuver.

Out-of-town visitor

Too many rocks and [unsteady] ground for [the] disabled, elderly or young [to walk].

Scottsdale resident

Finding one’s way around the property and knowing where things are happening is sometimes confusing.

Scottsdale resident

The [WestWorld] spaces are functional, but visually appealing shades and gates would provide more "photo-ready" opportunities.

Equestrian enthusiast

The facility, as a whole, has the look of an abandoned car lot. Vast, empty and ugly.

Equestrian enthusiast

It [was] still quite hot out [and] the arena didn't offer any seating or shade and we had young children and elderly in attendance.

Equestrian enthusiast

[Better] food vendors (variety, price, and quality).

Phoenix metro-area resident

Stop holding people hostage to buy your lousy food and overpriced drinks.

Scottsdale resident

D. Community Feedback – WestWorld strengths and areas for improvement

Variety of events. Some participants provided feedback on events held at WestWorld. Respondents indicated that they wanted more community-focused events, such as events that highlight local groups or child-friendly events. Respondents indicated interest in more animal-focused events, such as equestrian and canine competitions. Some respondents suggested that WestWorld do more arts and culture events, while other respondents stated that WestWorld should host more events in general.

Additional facility upgrades. Participants suggested several other types of facility upgrades and modernizations that would be helpful to have at the venue. Some respondents talked about adding permanent barns and stalls. They also stated that more of the equestrian spaces should be climate controlled, and a few indicated that there should be better drainage around the stables and arenas. Other respondents suggested upgrades that would create a better spectator experience, such as more comfortable seating, restrooms (including family-friendly ones) and RV hook-ups. Respondents said that accessibility could be improved through ADA design considerations. They stated that greater safety could be improved with additional security and lighting around the venue.

Advertising. Some survey participants stated that WestWorld could do a better job publicizing their events. Some participants found the website to be confusing to understand, and others said that WestWorld could have a stronger social media presence on sites such as Instagram and TikTok. Other participants added that event signage, such as street signs or billboards, in the local community could also bring attention to venue events.

Get more family-friendly events and rodeos.

Phoenix metro-area resident

More equestrian events and canine competitions.

Scottsdale resident

*More barns so horses are not stalled on tar in temporary stabling.
Better drainage in the arenas.*

Out-of-town visitor

Need more comfortable seats in arenas.

Scottsdale resident

ADA port-a-pots and raised platform so wheelchair users can see.

Athlete

More security for parked vehicles. I had a purse stolen while I was showing my horse in 2023.

Scottsdale resident

More local advertising of events.

Phoenix metro-area resident

I think Westworld could have a much better website that is more helpful to show the schedule of events and details of those events. I also think that social media should be updated as each event is there and link to the individual website.

Scottsdale resident

D. Community Feedback – Opportunities for success

Survey participants shared some visions for what future success might look like for WestWorld.

Perceptions of Success for WestWorld

When asked how to describe future success for WestWorld, survey participants shared the following ideas.

Equestrian-centric venue. Over half of participants echoed that the future of WestWorld prioritizes horses. Participants indicated that they hoped to see more equestrian and rodeo events that align with WestWorld’s original purpose and capitalize on its horse-focused facilities. Participants also indicated that facility upgrades, such as improved footing, could make WestWorld a premier equine venue. Participants indicated hope that WestWorld expands its equine offerings to include more dressage and hunter/jumper events. They also indicated that they desire for WestWorld to collaborate more closely with the equine community to become more welcoming and affordable for smaller equestrian groups to host events at the venue.

Event variety with a community focus. Participants stated that they have a desire for WestWorld to continue hosting a multitude and variety of events and activities at their facility. In addition to horse-related events, they expressed interest in events that showcase cars, dogs, outdoor activities, expos, festivals and RV shows. Participants said events should be fun, entertaining, engaging, community-oriented and family-friendly so that there is something for everyone to enjoy at WestWorld. Some participants said that WestWorld’s future should be creating value for local citizens.

Westworld has evolved over the decades to meet the needs of the greater equestrian community and Arizona. Continue to host notable equestrian events, and recruit new events. That is the legacy of Westworld and should be its future.

Equestrian enthusiast

Horse enthusiasts have very few options for exhibiting in this region. Please consider providing budget-friendly facilities available for smaller equestrian events as they are the tributaries to the larger, more financially lucrative, equestrian spectacles.

Rodeo enthusiast

WestWorld should have the ability to attract people the way big horse shows and large events do in other states.

Scottsdale resident

WestWorld should continue to host the many wonderful equestrian events along with shows like Barrett-Jackson, Junk in the Trunk, Home Shows and other events along this line. When these events are well done, it makes me check my calendar regularly to see "What's happening at WestWorld" this week.

Phoenix metro-area enthusiast

Future success at WestWorld looks like family, Arizona residents, and out-of-state visitors coming together, to enjoy together.

Scottsdale resident

Unique venue that embraces and showcases Arizona's diverse culture with distinct activities, such as equestrian events and activities, agricultural events, car shows, athletic events, musical events and other community events as desired by Arizonans.

Phoenix metro-area resident

D. Community Feedback – Opportunities for success

Financially accessible. Survey participants indicated that they have hope that WestWorld will become more financially accessible for exhibitors, especially smaller equestrian organizations. They also expressed that greater financial accessibility for spectators attending events at WestWorld could be achieved by lowering ticket and concession prices.

Economically impactful. Survey participants expressed that they have a desire for WestWorld to continue to be a revenue-generating venue that attracts tourists from across the country. They noted that tourism supports events and benefits local business. A few participants suggested renting meeting spaces in the venue when they are not being used for events to generate additional revenue.

Safe and accessible. Survey participants indicated that WestWorld should prioritize safety and accessibility in the future. They specified wanting greater venue access and event visibility for people with disabilities, as well as making the venue more user friendly and safe.

Provide an equestrian facility that is financially attractive to all groups and clubs, particularly those located in Arizona.

Phoenix metro-area resident

Affordable entrance fees allowing more people to attend. Reduce or eliminate paid parking to alleviate the overall attendee cost.

Scottsdale resident

Events that have a positive economic impact on the local economy.

Scottsdale resident

Highlights the city and brings in revenue and fun!

Scottsdale resident

Arizona has an opportunity to compete with the California equestrian circuit and bring in bright competitors and big tourism.

Out-of-town visitor

Allow more [ADA] areas, access and visibility.

Scottsdale resident

Clean & safe premises.

Equestrian enthusiast

D. Community Feedback – Opportunities for success

Favorable parking. Survey participants stated that WestWorld should have free and accessible parking options, as well as improved traffic flow. Suggestions included implementing a shuttle service, upgrading roads and offering parking passes.

Landscaping and shade. Participants expressed a desire for WestWorld to improve the beautification of the venue by adding additional landscaping and greenery around the venue. Additional trees and shaded areas were cited as key to improving the spectator experience throughout the year, particularly in warmer months.

Quality vendors. Survey participants recommended expanding and improving WestWorld’s food and beverage offerings at the venue. They indicated that WestWorld could consider a greater variety of vendors that would provide tasty, healthy and novel food options. Other participants suggested allowing people to bring in their own food, especially if they were hosting an event.

Well-advertised. Survey participants said that future success depends on stronger advertising and communication about upcoming events. Participants stated that the website could have current events and a calendar view, and that WestWorld should have a greater social media presence and more signage in the community about upcoming events. Suggestions included seeking corporate sponsors, partnering with school districts to reach families and promoting events through equine association email lists.

You shouldn't charge for parking. It's an unnecessary barrier to participation and limits the impact of the events you hold. It may also prevent some events from happening.

Scottsdale resident

Improved traffic flow and parking for large events.

Scottsdale resident

I think improved landscape ... would be positive.

Scottsdale resident

Outdoor garden and seating areas to enhance the entrance and surrounding areas. Trees with pathways , murals, and community engagement spaces.

Scottsdale resident

Allow other food vendors to come in. Allow people to hold barn parties with food and alcohol.

Scottsdale resident

The selection of food and drink is overpriced and of subpar quality.

Phoenix metro-area resident

Better event advertising. I never go because I don't know what's happening there.

Scottsdale resident

[Advertising] family events through the school district would be one great way to reach local families.

Scottsdale resident

D. Community Feedback – Preferences and priorities

Survey participants provided their perceptions of how WestWorld should prioritize sources of support.

Residents’ Perceptions of the Funding Priorities

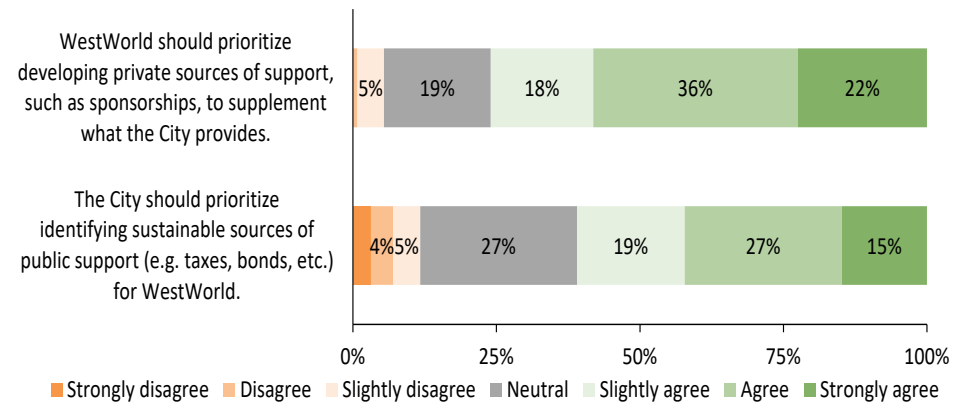
Figure D-18 presents Scottsdale residents’ responses to statements about how WestWorld should be supported financially using a seven-point agreement scale ranging from “strongly disagree” to “strongly agree.”

Three-quarters of Scottsdale residents slightly to strongly agreed that WestWorld should prioritize developing private sources of support to supplement City support.

Just over half of Scottsdale residents supported the City identifying sustainable sources of public funding for WestWorld. Almost 30 percent of residents were neutral about this statement.

Net rating. Figure D-19 shows the net rating for the funding statements described in Figure D-18. A net rating of 71 indicates that most respondents agreed with WestWorld developing private sources of support, such as sponsorships. With a net rating of 49, respondents were not as positive toward the City prioritizing sustainable sources of public support for WestWorld, such as taxes and bonds.

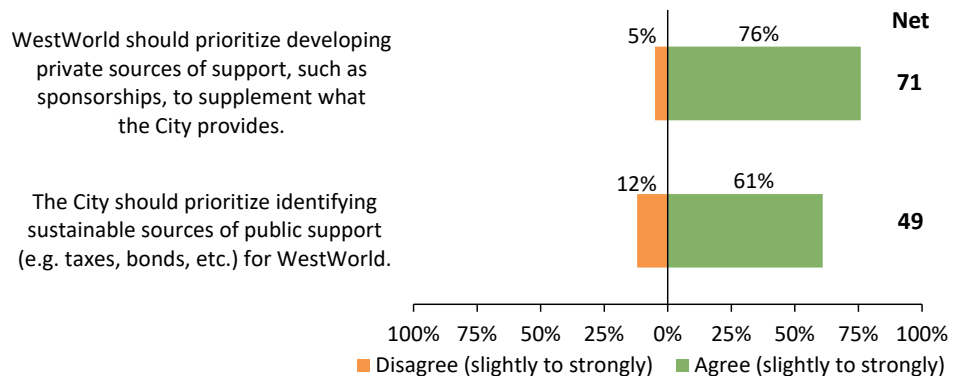
D-18. Perceptions of WestWorld’s funding priorities



Note: N=128-129. Non-residents of Scottsdale were excluded from analysis. Percentages are rounded to the nearest whole number and therefore may not sum to 100.

Source: Keen Independent Research.

D-19. Net ratings for perceptions of WestWorld’s funding priorities



Note: N=128-129. Non-residents of Scottsdale were excluded from analysis. The net rating is calculated by subtracting the sum of the “strongly disagree,” “disagree,” and “slightly disagree” responses from the sum of the participants who “strongly agree,” “agree,” and “slightly agree.”

Source: Keen Independent Research.

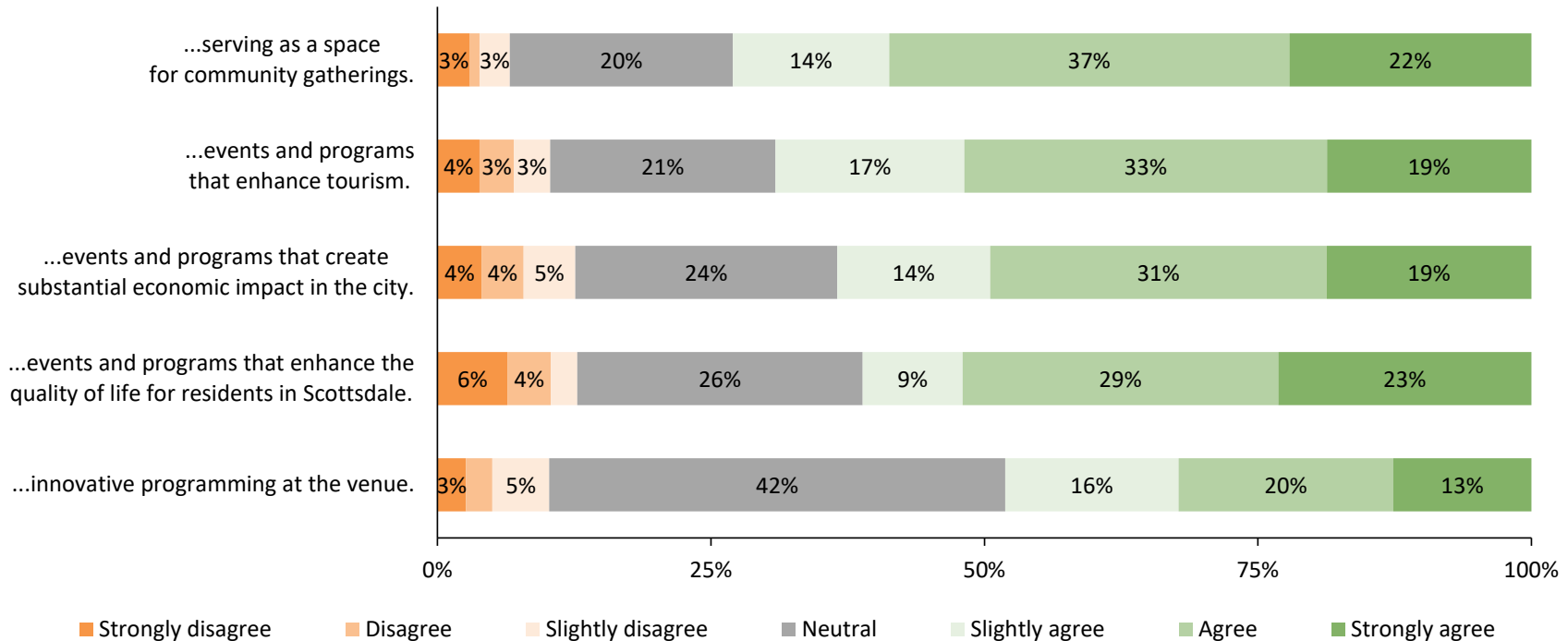
D. Community Feedback – Preferences and priorities

Participant Event Priorities

Survey participants provided their views on what types of events and programs WestWorld should prioritize. Figure D-20 shows all responses along a seven-point agreement scale ranging from “strongly disagree” to “strongly agree.” Nearly three quarters (73%) of respondents said that WestWorld should prioritize serving as a community gathering space. About 70 percent of respondents said that WestWorld should prioritize events and programs that enhance tourism. About 70 percent of respondents said that WestWorld should prioritize events and programs that enhance the quality of life for residents in Scottsdale.

Only 48 percent of respondents slightly to strongly agreed that WestWorld should prioritize innovative programming. Just under half of respondents were neutral about whether innovative programming should be a priority.

D-20. Responses to the statement, WestWorld should prioritize...



Note: N=499-579. Percentages are rounded to the nearest whole number and therefore may not sum to 100. Includes responses from facility staff and City employees.

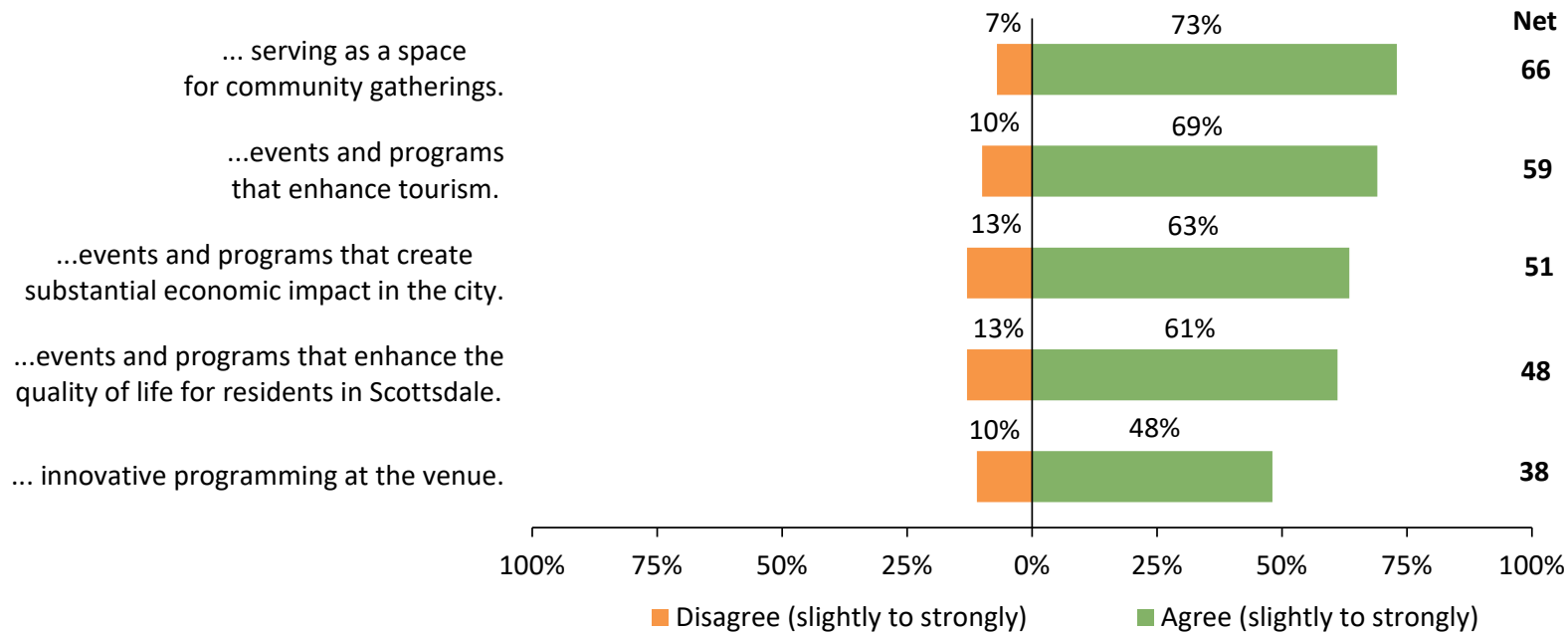
Source: Keen Independent Research.

D. Community Feedback – Preferences and priorities

Participant Event Priorities

Figure D-21 highlights the net rating for statements discussed in Figure D-20. WestWorld “serving as a space for community gatherings” and “events and programs that enhance tourism” received the highest net ratings of 66 and 59 respectively. Respondents to a lesser degree said that WestWorld should prioritize innovative programming at the venue, with a net rating of 38. These results align with respondent views that WestWorld should prioritize events that are well-suited for their facility and can attract attendees from other regions.

D-21. Responses to the statement, WestWorld should prioritize...



Note: N=499-579. The net rating is calculated by subtracting the sum of the “strongly disagree,” “disagree,” and “slightly disagree” responses from the sum of the participants who “strongly agree,” “agree,” and “slightly agree.” Includes responses from facility staff and City employees.

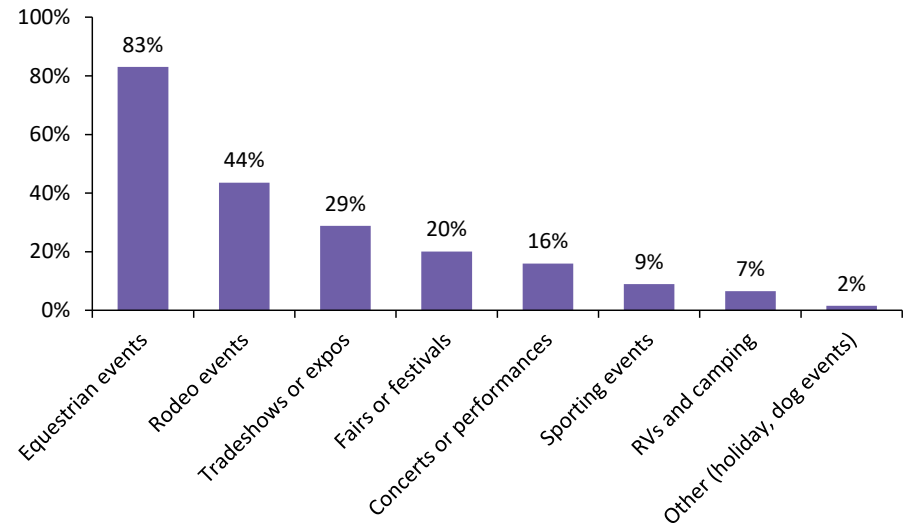
Source: Keen Independent Research.

D. Community Feedback – Preferences and priorities

Future Event Interests

When asked about which events they are most interested in attending at WestWorld, 83 percent of respondents indicated interest in equestrian events (Figure D-22). Just under half of participants shared interest in rodeo events. Some participants expressed interest in tradeshow, expos, fairs and festivals. Sporting events and RVs/camping-related events received the least number of responses.

D-22. Future event interests



Note: N=583. Participants could select up to three responses. Includes responses from facility staff and City employees.

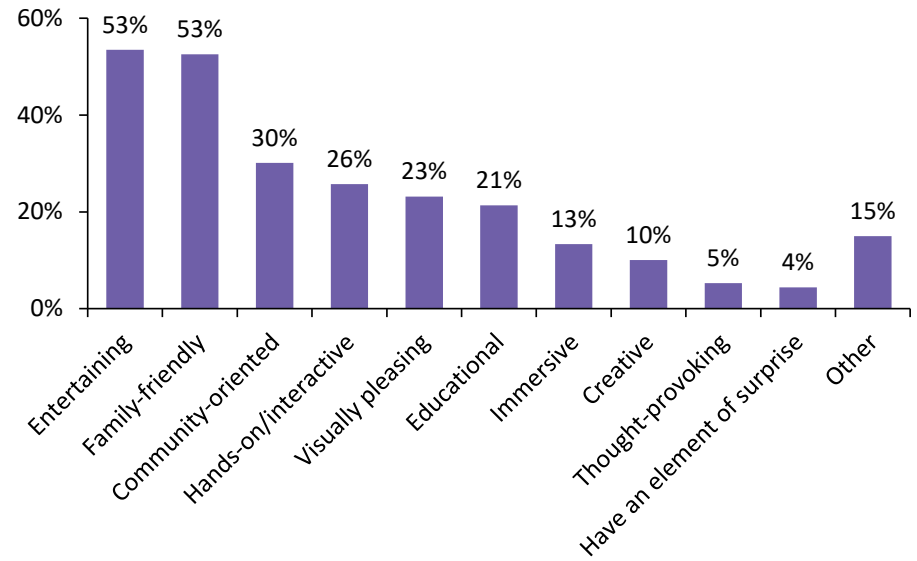
Source: Keen Independent Research.

D. Community Feedback – Preferences and priorities

Event Experience Interests

When asked about event experiences of greatest interest, just over half of respondents indicated that they wanted events that were entertaining or family friendly. Around thirty percent of respondents indicated that they are interested in community-oriented events or hands-on/interactive events. Figure D-23 showcases the range of experiences that survey respondents are interested in at WestWorld.

D-23. Event experience interests



Note: N=548. Participants could select up to three responses.

Source: Keen Independent Research.

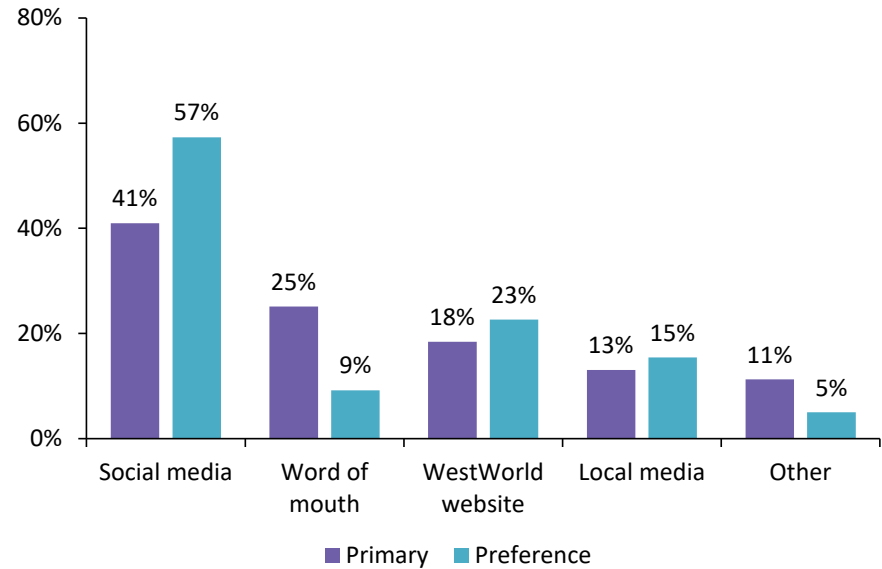
D. Community Feedback – Preferences and priorities

Communication Preferences

Survey participants were asked about how they learn about WestWorld events currently and what their preferences are for future communication (Figure D-24). Survey participants reported that they learn about WestWorld events through a range of communication modes, including social media (41%), word of mouth (25%), the WestWorld website (18%) and local media (13%).

Participants shared that they have a preference for learning about future events through social media (57%) and the WestWorld website (23%).

D-24. Survey participants' communication preferences



Note: N=599-505. Some participants selected more than one response.

Source: Keen Independent Research.

D. Community Feedback – Online reviews

Overall, WestWorld has a rating of 4.6 out of 5 stars on Google based on nearly 5,000 reviews. Between April 15, 2024 to April 15, 2025, WestWorld received more than 500 reviews. During the time period analyzed, reviews mentioned a variety of events and customer experiences at WestWorld.

Venue quality. On Google reviews, guests praised aspects of the venue such as its spacious layout, easy access and great air conditioning for indoor events. Some individuals also commented on the beautiful desert mountain views from the venue.

Great event experiences. Many reviewers noted that WestWorld has great events and experiences for kids, horse and dog lovers, car enthusiasts and craft lovers. They mentioned the specific events they attended such as Barrett-Jackson and Arizona Bike Week.

Parking and traffic flow. Some complaints about visitors' experience at WestWorld included the fact that some parking lots were dusty, unpaved or far from the entrances. Other reviewers noted a lack of clear signage, which made it difficult for first-time visitors to navigate the area. Some attendees indicated that traffic flow and exits could be more efficient.

Pricing. Some commenters reported WestWorld as overpriced, citing parking fees (\$10 to \$25), price for RV camping and food and beverage (\$12 for hamburger and \$6 for water) as examples.

Great place to go and enjoy all the activities

WestWorld Google review

The venue itself is indoors and I felt the air conditioning which was amazing, so important during the summer here in Phoenix.

WestWorld Google review

Great venue with lots of beautiful horses and over a dozen different arenas with various different shows to choose from.

WestWorld Google review

Decent venue for car shows, horse shows and bikes.

WestWorld Google review

This is a great place to hold expos; it's an open and spacious warehouse that leaves room for hundreds to navigate the room. The only thing I have to say that is negative is the price of food is rather high

WestWorld Google review

Parking was chaotic, no signs, not well organized.

WestWorld Google review

Parking for Barrett-Jackson was so-so. The parking lot was not paved and, of course, was dirty, dusty, and poorly marked

WestWorld Google review

The costs are ridiculous. You pay for parking, \$6 for water and forget food. Carnival food for 5 times its value.

WestWorld Google review

Appendix E. User and Key Stakeholder Feedback – Introduction and methodology

Keen Independent conducted interviews and administered a survey with WestWorld users, such as event producers, and key stakeholders to provide input on future planning for WestWorld’s Strategic Plan.

Survey of City Staff

The virtual survey was distributed to City of Scottsdale staff. This survey collected information about the facility’s public experience as well as future goals, values and priorities. The virtual survey was open from April 1 through May 30, 2025. In total, this survey collected 31 responses. All questions were optional. Both completed and partial surveys are included in the analysis, as many partial responses contained substantial data.

Group Discussions and In-depth Interviews

The study team facilitated group discussions and in-depth interviews with WestWorld staff, renters and exhibitors, vendors and Scottsdale City leaders. Keen Independent used a semi-structured interview format, guided by a standard question set that allowed interviewers to ask follow-up questions and probe when necessary to deepen understanding or clarify comments. Keen Independent spoke with approximately 60 stakeholders through discussions and in-depth interviews for this study.

Interview questions explored the following topics:

- Strengths and weaknesses;
- Opportunities and perceptions of success;
- Threats and barriers to success;
- Future priorities; and
- Key performance indicators.

Quotes from Participants

Selected quotes are included in this appendix to illustrate themes the study team found during analysis of survey participant input. Participants were informed their responses would be analyzed in aggregate and that the study team would not report individually identifying information. Quotes from survey participants include non-individually identifying attribution such as, “community event organizer,” “event support staff,” “City staff” or “City leader.”

Topics

The analysis in this appendix reflects the perspectives of approximately 90 respondents. Analysis is organized by the following topics:

- Introduction and methodology;
- Facility feedback;
- Opportunities for success;
- Barriers to success;
- Preferences and priorities; and
- Survey demographics.

E. User and Key Stakeholder Feedback – Strengths

Interviewees and discussion participants were asked to share their thoughts on WestWorld’s greatest strengths.

Facility

Stakeholders identified strengths of the physical infrastructure of WestWorld as well as its location.

Unique property. Many stakeholders remarked on how “unique” WestWorld is from other properties around the country that host similar events. They described the facility as “one-of-a-kind,” highlighting its size, location, variety of buildings and arenas, history and character.

Location and access. Many stakeholders indicated that WestWorld’s location is one of its greatest strengths. They detailed that the facility’s location is convenient to access, as well as close to the highway and metropolitan areas with hotels, restaurants and retail.

Venue size and capabilities. Many stakeholders stated that WestWorld’s size and associated facilities are a great strength. They indicated appreciation for both indoor and outdoor facilities and that the indoor area is climate controlled. Respondents also reported that the property’s size and variety of facilities make the venue flexible for different kinds of events.

Pavement and traffic flow. A couple of stakeholders indicated that WestWorld’s expansive pavement is a strength for hosting different types of events at WestWorld. They indicated that asphalt allows the venue to be a multi-purpose space and is particularly useful for accessible parking. A couple of stakeholders added that it is easy to enter and exit the venue.

Operations and Programming

Stakeholders identified a number of positive aspects of WestWorld operations and programming.

Economic driver. Some stakeholders commented on the economic impact that WestWorld has on the Scottsdale community. They noted that WestWorld events attract both residents and tourists, adding that the venue’s proximity to Scottsdale makes it an asset for supporting nearby hotels and local businesses. Stakeholders indicated that WestWorld has a good reputation locally and nationally.

Major regional and national events. Some stakeholders indicated that WestWorld’s diversity of events, as well as its signature events, such as the Barrett-Jackson Car Auction and the Scottsdale Arabian Horse Show, are part of its strengths. Stakeholders commented that these events are prestigious and revenue-generating for WestWorld.

Hard-working staff. Stakeholders indicated that the front-line staff work hard to ensure events run well. A few stakeholders indicated that some staff have been at WestWorld for many years, which can be a strength as they have ample institutional knowledge. Some indicated excitement about the new General Manager.

Cleanliness and grounds maintenance. A couple of stakeholders remarked that the WestWorld facility appears to be well-maintained.

E. User and Key Stakeholder Feedback – Weaknesses

Interviewee and discussion group participants were asked to share their thoughts on WestWorld’s greatest weaknesses.

Facility

Some stakeholders identified certain structural aspects of the venue as weaknesses.

Deferred maintenance and upgrades. Many stakeholders identified facility upgrades as a key weakness at WestWorld. They cited the need for improved electrical infrastructure, especially in areas lacking existing power, along with upgrades to the facility-wide audio system to better support wireless capabilities and perform reliably in dusty conditions. Other suggested improvements included enhanced wayfinding for event patrons, improved drainage to address flooding concerns, and more weather-resistant spaces and hard-scape surfaces.

Lack of refinement. Some stakeholders described WestWorld as lacking refinement. They characterized the venue as “raw and uninviting,” making it less appealing for organizations hosting indoor events, such as galas. The prevalence of dust was noted as difficult to control, contributing to the perception that spaces feel unclean. Several stakeholders also remarked that WestWorld lacks a grand entrance, which could help establish a stronger sense of arrival and destination.

External Communications

Stakeholders identified weaknesses in communication both within the City and externally with the greater public and potential renters.

City interdepartmental interactions. Staff from multiple City departments pointed to miscommunication and misunderstanding between WestWorld staff, other City staff (such as Police and Fire) and City leadership as a significant weakness.

Some WestWorld staff members reported feeling pressured to operate the venue without sufficient staffing or resources. Stakeholders also indicated a lack of clarity and coordination across City departments regarding resourcing for safety and security. Several noted that City staff often do not fully understand the role of WestWorld staff in supporting the venue and event planning, which can hinder their effectiveness. WestWorld staff also noted that departments sometimes provide conflicting information.

Identity and branding. Many stakeholders reported that WestWorld lacks a clear programming identity or vision expected from a premier venue. They noted the absence of a strategic framework for prioritizing events or necessary facility improvements. Stakeholders also commented that WestWorld has not clearly defined its values or goals, which could help guide planning and decision-making.

Promotion. A few stakeholders identified marketing as a weakness of WestWorld. They stated that the venue is not doing enough to promote upcoming events and suggested that nearby community members may not attend simply because they are unaware of what is happening at WestWorld.

E. User and Key Stakeholder Feedback – Weaknesses

Staff and Management

Stakeholders identified elements of WestWorld’s staffing and management as a primary area of weakness.

Communication with clients. Several stakeholders who hold events at WestWorld or support event coordination reported poor communication during the planning process. They also noted that some staff are not as knowledgeable as they could be about the venue.

Internal cohesion. Some stakeholders remarked that WestWorld staff are missing a sense of urgency that is critical to successful event execution and can appear resistant to change. Some stakeholders reported a staff culture that lacks accountability and pride in the facility, which they said is not in the best interest of hosting successful events or facility upkeep.

Turnover. Some stakeholders cited continued management turnover as a contributor to inconsistent leadership, negatively affecting event planning and facility upkeep.

Other Weaknesses

Key stakeholders identified additional concerns related to operating procedures, the contract process, facility utilization, food and beverage restrictions, and outsourced services as weaknesses.

Standard operating procedures. A few stakeholders noted that WestWorld lacks adequate standard operating procedures. They stated that event organizers do not have clear standard operating procedures to consult and that contracts do not clearly outline roles and responsibilities of the venue or event organizer.

Contract process. Some stakeholders stated that contracts are too long and not well-written. Others described the rental agreements and fee structure as burdensome, with additional costs that seem to “nickel and dime” event organizers, making it hard to determine the true overall rental cost.

Some stakeholders noted inconsistencies with invoice timing and the date reservation process. For example, one stakeholder questioned why some organizers can book multiple dates at once, while others are limited to reserving one date at a time.

A few stakeholders stated that WestWorld has not consistently reviewed long-term contracts that may no longer serve the venue. These contracts may occupy highly desirable dates while generating limited revenue.

E. User and Key Stakeholder Feedback – Weaknesses

Lack of full facility utilization. Several stakeholders indicated that WestWorld facilities are overall underutilized. They explained that, due to its large size, most events only use a fraction of the venue while the remaining infrastructure sits empty. Alternatively, some stakeholders discussed that when multiple events are held on the property simultaneously, there have been challenges with loading, unloading, staff support and navigation.

Food and beverage restrictions. Several stakeholders reported that the food and beverage options at WestWorld are a weakness. They noted a lack of flexibility to bring in outside vendors and said current offerings do not align with their event audiences. They also remarked that the current vendor is too expensive.

Revenue opportunity loss from outsourcing. A few stakeholders remarked that WestWorld loses revenue by outsourcing amenities and services that could be managed in-house, such as food and beverage, parking, equipment rentals, sales and marketing. A few stakeholders also reported that the priorities of a third-party vendor may clash with the priorities of WestWorld as a city-run facility.



E. User and Key Stakeholder Feedback – Opportunities for success

Interviewee and discussion group participants shared their visions of what future success might look like for WestWorld, along with opportunities to achieve that success.

Driving Economic Impact

Driving economic impact was a common theme among interviewees as a key opportunity for WestWorld to continue to lean into.

Contributing to more “heads in beds.” Most stakeholders indicated that success for WestWorld means serving as a strong economic driver for the City, its vendors and the Scottsdale community. Some described success in terms of “heads in beds,” with WestWorld attracting tourists who stay overnight in Scottsdale hotels or other accommodations.

Stakeholders indicated that opportunities for achieving success include developing a strategic plan focused on economic development and building a sales team dedicated to booking events aligned with the plan and strategic objectives.

Maximizing major multi-day events. Most stakeholders described success in terms of event types held at WestWorld. Stakeholders expressed hope that the venue would remain open to new potential event types, such as music festivals or other multi-day events. Stakeholders indicated hope that WestWorld would program highly desirable and impactful events that could lead to economic growth.

Some stakeholders remarked that WestWorld needs a signature event or series, likely equestrian-related, that could be recognized and marketed nationally. Stakeholders also noted that programming should reach beyond a local audience and align with the venue’s priorities and goals (once those are defined).

I want the facility to be busy and fully optimized. I want to... generate revenue and economic impact wherever possible.

City staff

It's about being an economic driver for the City with great events and branding.

City leader

Your economic impact comes from people that come in from out of town ... It's not just what they pay Westworld. It's what the city brings in.

Community event organizer

We have a bed tax in the City of Scottsdale where that funding goes into a tourism development fund... And I would love to see those dollars stretched even more.

Community event organizer

WestWorld has the ability to attract major events. They could do a huge music festival on the polo field... They already have a lot of the things that go with the Music Festival concept.

Community event organizer

[WestWorld] needs more events that are recognized and well-known, like signature events or something like that.

City staff

Why hasn't this community and the WestWorld team developed something like a rodeo series?

Community event organizer

E. User and Key Stakeholder Feedback – Opportunities for success

Marketing/Communications

Stakeholders identified several areas of opportunity for improving marketing and communications related to WestWorld.

Increased identity and brand recognition. Many stakeholders indicated that success for WestWorld means developing a clear identity and brand for the venue. With a clear direction in place, the venue can better make decisions that serve the event organizers, community, event attendees and the City. Some stakeholders suggested that WestWorld’s identity should be rooted in western culture as a nod to Scottsdale’s history and heritage. Some stakeholders added that equestrian activities should remain part of its identity. Other stakeholders specified that WestWorld’s brand should appeal to a luxury traveler. Stakeholders indicated that a clear brand gives WestWorld an opportunity to build name recognition.

Program optimization. Some stakeholders indicated that success for WestWorld means optimizing its event calendar to activate as much of the venue as possible throughout the year.

Some stakeholders indicated that calendar optimization likely means reviewing long-term contracts with event organizers to ensure date availability and event type are still in the best interest of WestWorld’s programming strategy. Some stakeholders added that WestWorld should look for event synergies, where an audience for one event could carry over into a different event happening at the same time.

A couple of stakeholders added that staff across City-run venues should improve communication with one another so that events that are not a fit for WestWorld could potentially be placed at an alternative City-operated venue.

Our destination marketing organization really promotes to the luxury traveler... WestWorld is a way to enhance that experience for [travelers], so [we should be] creating events there that do just that.

City staff

I think really capitalizing on Scottsdale's brand and the Western culture.

City staff

Is it part of the park system? Should it be treated like a convention center? ... Everybody's got a different opinion And there's not really a cohesive plan as to how you build it out and how you maintain it.

Community event organizer

I would love to see more collaboration with other events that are going on within the valley... How do we make people from spring training come out to WestWorld to see the events?

Community event organizer

There's not a lot more time and space at the facility. If there's going to be a pivot to another direction, then it's going to come at the expense of events that don't carry the same value as other events.

City staff

E. User and Key Stakeholder Feedback – Opportunities for success

Promotional strategies that reach more metro Phoenix residents.

Some stakeholders indicated that success for WestWorld means having a marketing strategy that better communicates events to the community and beyond. Stakeholders provided suggestions for achieving this strategy, including increased event signage such as an electric billboard on the highway, developing marketing lists and utilizing WestWorld’s website and social media channels. Some stakeholders said that marketing should further promote the value that equestrian programming brings to WestWorld and the community.

Clear and desirable contracts. Some stakeholders described success in terms of contract updates and restructured pricing models. Some suggestions included offering a blended rate that does not itemize individual fees, different peak and off-peak pricing, providing financial incentives for new bookers and developing turnkey packages that make booking simpler. One stakeholder commented that producers could use a step-by-step guide for navigating the contracting and funding process with WestWorld and the City of Scottsdale.

I think one of the opportunities for WestWorld is marketing. Once they find out who they are, [it's] getting that out there.

Community event organizer

Success would be that ... you talk to someone on the East Coast [and] they've heard of WestWorld.

City staff

[If] we want to attract people here in the off-season... finding ways to be easier to do business with during that period would be a really good opportunity for them.

Community event organizer

There's potential from a prospective producers perspective that they're being nickel and dimed [as] opposed to making sure you capture all your fees and this is what the fee is.

City staff

The state of Texas helps fund incentives that are gifted to producers of very large, very profitable shows. Having a fresh approach from the City would help and then couple that with turnkey packages for that Memorial Day to Labor Day window.

Event support staff

E. User and Key Stakeholder Feedback – Opportunities for success

Management and Staffing

Improving various aspects of management and staffing was another area of opportunity identified by stakeholders.

Instilling venue management culture. Some stakeholders indicated that success for WestWorld entails having staff who are knowledgeable about venue operations and can support event organizers to optimize venue use. Stakeholders indicated that WestWorld staff should be professional, accountable and able to provide high-quality customer service.

Increased professional development opportunities. A couple of stakeholders stated that opportunities to management and staffing include fostering a culture of learning, providing professional development opportunities and developing a succession plan.

Development of standard operating procedures. Several stakeholders discussed success in terms of streamlined operations. They discussed that opportunities to support this effort could include creating standard operating procedures and rules for all event organizers to follow, as well as having clear roles and responsibilities outlined during the contracting process.

These events are turning over [and] you've only got a very limited amount of time to get in and get out and you need to be working well together.

City staff

That [WestWorld staff] know what's needed [for safety] ahead of time and [then they] can pass that information along to producers and to renters.

Event support staff

Strong understanding and strong support from the top is going to be really valuable for WestWorld. I sense that [what] staff [are] really looking for is direction so they know which direction to go in.

City staff

These are the rules for our venue across the board. If you want to play here, then these are the rules that you have to play by.

City staff

They need to... bring on risk management [and] legal to help establish more consistent rules to maximize [venue operations] and efficiency.

City staff

E. User and Key Stakeholder Feedback – Opportunities for success

Other Opportunities

Stakeholders mentioned other opportunities such as building collaboration and trust, bringing services in house and ensuring that facilities are well maintained and up-to-date.

Building collaboration and trust. A few stakeholders discussed success in terms of how well all key stakeholders are listening to one another, including WestWorld staff, City leadership, event organizers, event support staff and community residents. Some stakeholders said that building trust between these groups is important for developing a unified direction for WestWorld and for making decisions about the venue that support successful events for everyone.

Bringing services in house. A few stakeholders indicated that WestWorld could be more successful if they managed more of their amenities and services in-house, which they said would maximize WestWorld’s profit and contribute to a better experience. For example, stakeholders indicated that by managing parking, food and beverage, equipment rentals (i.e. barricades, temporary fencing, ramps) and sales/marketing in-house, WestWorld could make more money from those services and each event would not need to rent separately from a third-party vendor.

Ensuring facilities are well maintained and up-to-date. Many stakeholders specified that success for WestWorld means addressing priority facility upgrades, including venue safety, that contribute to providing a high-quality event experience. Stakeholders specified that upgrades should align with priorities of events being held at WestWorld, which includes better drainage, parking, paving and shelter. A couple of stakeholders added staff offices needed updating to better fit their operational needs and boost morale.

The highest priority in my mind [is] that the community and the elected officials and the management of WestWorld need to come together and decide on the direction of WestWorld.

City staff

I think internally getting that team all working together well would be a priority for me because I think it makes it easier to take WestWorld to the next level.

City staff

If WestWorld invested in equipment, they would certainly make revenue off it. They would be able to offer those elements, that all the events need, to producers at a better price than we could get on the regular market. They would keep more profit in-house and they could also reduce costs to producers.

Community event organizer

Right now [WestWorld] outsources their sales and marketing. There's been some conversations about maybe internalizing that and cutting out those shared fees.

City staff

[If] we want to compete with these world-class facilities, we have to put a significant amount of money into upgrading the facility.

City staff

Being able to use the site consistently in all weather... we've got to deal better with [how the] water flows.

City staff

E. User and Key Stakeholder Feedback – Barriers to success

Interviewee and discussion group participants described potential threats or barriers to achieving success at WestWorld. When asked to describe potential threats or barriers to success at WestWorld, respondents shared the following concerns.

Government Restrictions

Government restrictions around the contract process, marketing and other bureaucracy were identified as potential barriers to success.

Contract process. Some stakeholders indicated that the current contracting process is a barrier to WestWorld’s growth as a venue. Some stakeholders said that existing long-term contracts prevent WestWorld from booking new events that better utilize the facility or potentially draw a better audience. Additionally, stakeholders said that WestWorld’s current pricing and fee structure makes booking events challenging to navigate.

Bureaucracy. Some stakeholders indicated that government bureaucracy is a barrier to success. Some stakeholders commented that City leadership often does not have a strong understanding of WestWorld as a venue, which leads to disagreements about its identity, management model and adequate staffing levels. Stakeholders said that these disagreements slow down funding for facility upgrades. Some stakeholders remarked that the City of Scottsdale has more safety restrictions than other cities, which adds to the expense of producing events at WestWorld.

Marketing restrictions. A few stakeholders indicated concern over restrictions from the City on marketing events and providing event incentives to organizers. Stakeholders said that these parameters around sponsorship, funding and incentives can make event promotion harder and less appealing to potential event organizers.

[There are] grandfathered-in clients with huge blocks of time and long-term contracts.

WestWorld staff

I believe any deviation from [a] standard contract requires City Council involvement ... [a] corporate planner from Lexus is not going to stand before City Council when they could just go to Dallas and make [their event] happen.

Community event organizer

The staff [at WestWorld] will say that even though they're part of the City, sometimes they feel that the City doesn't really understand what WestWorld is or what it does.

Community event organizer

[For] police and fire, [The City has] standards that are way above other municipalities when it comes to the number of people they think you need.

Event support staff

If the City sees the opportunity as WestWorld being a revenue generating facility, then we have to make it easier for clients to access [City] funds to make us competitive.

Community event organizer

Scottsdale can't pay to get these shows. [It's] difficult to work with because of the gift clause.

WestWorld staff

E. User and Key Stakeholder Feedback – Barriers to success

Vision/Focus

Some stakeholders identified concerns with the focus of the strategic plan being too broad, with others indicating concerns of the plan being too narrow.

Narrow vision. Some stakeholders indicated that having too narrow of a vision for WestWorld could be a barrier to the venue fully realizing its potential. They remarked that being narrowly focused on the programming that WestWorld has historically produced may not use the facility to its greatest ability. Stakeholders added that the venue should be getting creative and taking risks.

Broad vision. A few stakeholders indicated that if WestWorld focuses too much on being a multipurpose facility, they run the chance of being too broad. Some stakeholders indicated that if WestWorld tries to create a venue that works for everyone, they may end up with a venue that works for no one. One stakeholder explained that there are inefficiencies when changing over some spaces for different types of back-to-back events. They noted that some infrastructure can be easily transformed for different events, while other infrastructure is best utilized for a specific focus. A few stakeholders indicated that the City should be selective of events at WestWorld to preserve its reputation.

I think we're also limited by the vision of the people that are operating [WestWorld] today. I think they're hesitant to go down a road where they're doing multiple things at multiple times.

Event support staff

If [there's] a really good opportunity or a really good event that they want to go after, taking a risk might make sense. I think the weaknesses is the fear of prioritizing that.

Community event organizer

I think what could stand in the way [of success is] if we try to be everything for everybody.

City staff

Are there some areas that maybe shouldn't have as much radical type [of] flexibility, but keep [those] certain areas where it makes more sense? Then you know [the] flexibilities you have.

City staff

If we aren't careful about what types of events that we're bringing in. I think we can run the risk of ruining the reputation of WestWorld.

City staff

E. User and Key Stakeholder Feedback – Barriers to success

Other Barriers

Other potential barriers to success identified by stakeholders included themes around lacking standard operating procedures, resident complaints and potential issues surrounding the master plan.

Lack of standard operating procedures. Some stakeholders indicated that having no standard operating procedures documented for event organizers to follow is a barrier for WestWorld to operate as a premier event space. One stakeholder referred to producing events at WestWorld as “clumsy” and “unsophisticated” due to the lack of protocol.

Resident complaints. Some stakeholders indicated that residents who live near WestWorld could be a barrier to its success. Although the venue was here before most of the residential areas were developed, stakeholders said that there are often complaints about noise, lights and the venue’s aesthetic. Stakeholders indicated worry that as the surrounding community grows, WestWorld’s development could continue to be a challenge.

Inadequate master plan. Some stakeholders shared concerns over the WestWorld master plan, which focuses on prioritizing updates to physical infrastructure.¹ Some indicated that the plan is a barrier to progress because the City is not collaborating with key stakeholders and the plan is seemingly not prioritizing the most critical upgrades. Some remarked that the plan is taking too long to create, making it more susceptible to modifications when City leadership changes.

¹ The WestWorld strategic plan is separate from the master plan, as it is focused on strategy and operations.

[To] allow [producers] to just use the property as they wish, I think is actually a threat because it turns into a jigsaw puzzle of trying to put together safety plans and implement safety measures to meet each individual producer's idea.

City staff

The area has built up around WestWorld. It used to be very remote. The residents move in and then they don't like the fact that they moved next to a noisy special event venue.

Community event organizer

We had issues when the tent had the flag on it. The folks up north didn't like to see the flag so we changed out that tent and now we have just a plain beige skin.

City staff

[The new master plan] doesn't work for the equestrian community. It doesn't work for the special event community ... [What's] frustrating is sometimes the City [will] involve events ... sometimes they don't.

Community event organizer

E. User and Key Stakeholder Feedback – Preferences and priorities

Stakeholders reflected on their preferences and priorities for the future of WestWorld.

Supporting Scottsdale Residents

Some interviewed stakeholders talked about the ways that WestWorld could better support Scottsdale residents. They indicated that WestWorld could bring residents more into the event planning process and that WestWorld could better advertise their events to the community as a potential audience. Some stakeholders talked about finding a balance between programming for the community and for tourists. A couple of stakeholders suggested that off-peak months at WestWorld could have more community-focused programming like summer camps, cultural events or free horseback riding lessons, especially if they could be held indoors with air conditioning.

Some stakeholders did not share additional ideas to engage the community, indicating that WestWorld is already serving their community and that WestWorld's primary focus should be hosting impactful events.

Supporting Local Businesses

Some interviewed stakeholders discussed ways that WestWorld could better support local businesses. Some stakeholders indicated that WestWorld could allow sponsorships that promote local businesses, and others suggested that local businesses could be food vendors at the venue. Some stakeholders added that WestWorld should focus on hosting multi-day events because it supports local hotels, restaurants and retail when venue patrons stay in town. Some stakeholders indicated that WestWorld events are already serving local businesses.

Once WestWorld decides what it wants to be... you can then figure out what the residents of Scottsdale are interested in.... What would give the community pride about this event?

City staff

Programming from a citizen perspective ... like free or reduced rate horse riding lessons that [WestWorld] could partner on ... Some sort of offering during their downtime that's minimal impact on the expenses of WestWorld.

City staff

I think WestWorld serves the residents of Scottsdale pretty well... They've got it booked constantly ... They're bringing tax dollars to town. They're bringing people to town that want to experience Scottsdale. I don't know how they can do that part a whole lot better.

Community event organizer

We try to get the local restaurants to come and be a part of the event, which we do with a bunch of those [restaurants].

Community event organizer

[Are] there sponsorships that that year-round they could do to help promote and offer local businesses during these major events?

City staff

[If] it's a larger event, where people are coming for multiple days, you're going to benefit the local businesses. They're going to stay here and [go to] restaurants and that's what our community thrives on.

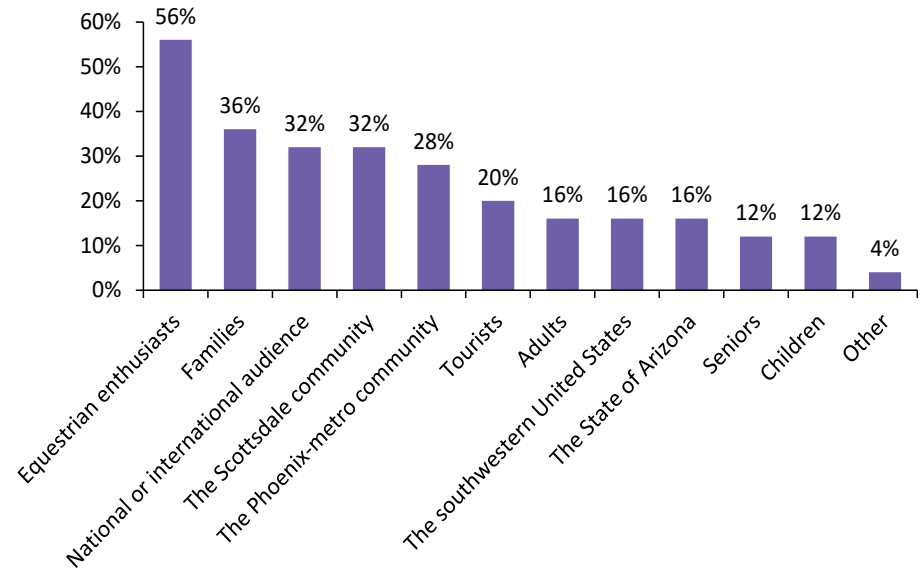
City staff

E. User and Key Stakeholder Feedback – Preferences and priorities (survey responses)

Priorities Identified by City Staff

In the survey of City staff, when asked what audiences WestWorld should focus on serving in the future, just over half of survey respondents (56%) indicated that WestWorld should focus on equestrian enthusiasts. Respondents also indicated that WestWorld should focus on families (36%), national or international audiences (32%) and the Scottsdale community (32%). Figure E-1 shows the range of audiences selected by survey respondents.

E-1. Survey respondent audience priorities



Note: N=25. Participants could select up to three responses.

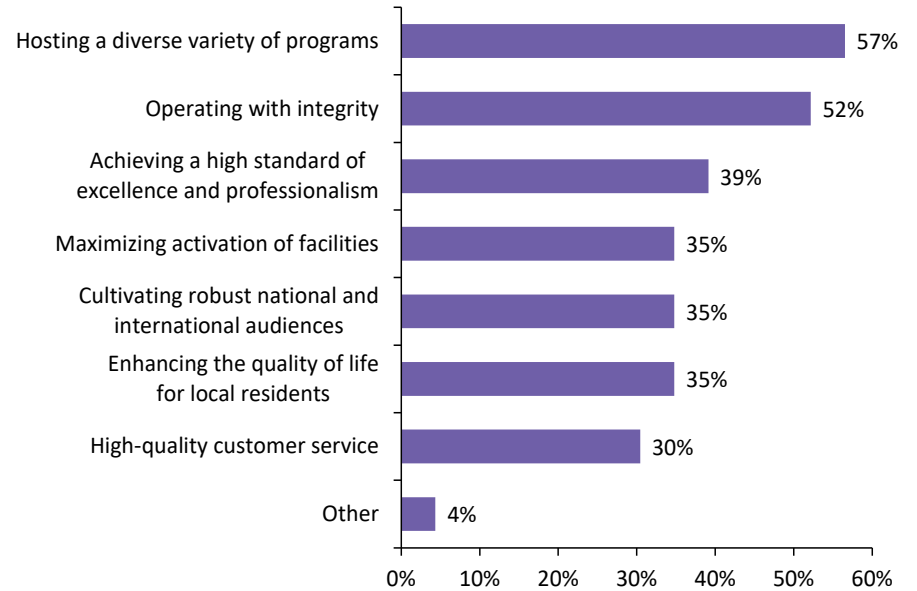
Source: Keen Independent Research.

E. User and Key Stakeholder Feedback – Preferences and priorities (survey responses)

Values for the Future

When asked what values WestWorld should prioritize to guide its future work, just over half of survey respondents (57%) indicated that WestWorld should host a variety of programs and operate with integrity (52%). Almost forty percent (39%) of respondents said that WestWorld should focus on achieving a high standard of excellence and professionalism. Figure E-2 shows the range of values selected by survey respondents.

E-2. Survey respondent future values



Note: N=23. Participants could select up to three responses.

Source: Keen Independent Research.

E. User and Key Stakeholder Feedback – Preferences and priorities (survey responses)

Goals for the Future

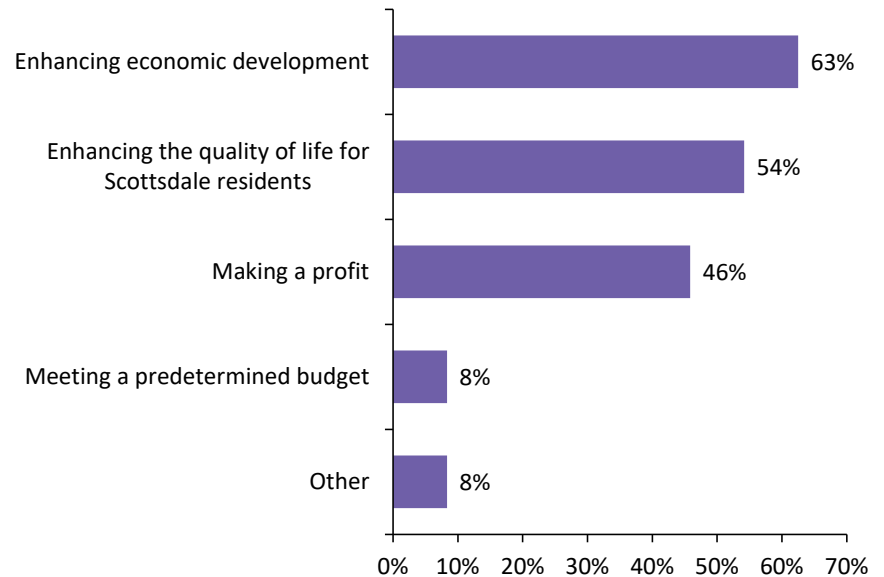
When asked what goals WestWorld should prioritize, almost two-thirds of survey respondents (63%) indicated that WestWorld should prioritize enhancing economic development. Over half of respondents (54%) also indicated that WestWorld should prioritize enhancing the quality of life for Scottsdale residents. Just under half of respondents (46%) indicated that WestWorld should prioritize making a profit. Figure E-3 shows all responses that respondents believe WestWorld should prioritize.

Key Performance Indicators

Interview and discussion participants were asked about key performance indicators for WestWorld. They indicated an interest in tracking the following measures annually:

- Revenue generated;
- Net profit per event;
- Percent of facility utilization throughout the year;
- Total days programmed;
- Total new events booked;
- Total repeat bookings;
- Total first-time attendees;
- Total events spanning longer than three days;
- Total hotel rooms booked; and
- Length of visitor stay.

E-3. Survey respondent goals to prioritize



Note: N=24. Participants could select up to two responses.

Source: Keen Independent Research.

E. User and Key Stakeholder Feedback – Survey demographics

Keen Independent examined the demographics of survey participants, including their race and ethnicity, gender, age, affiliations with WestWorld and other demographic identifiers.

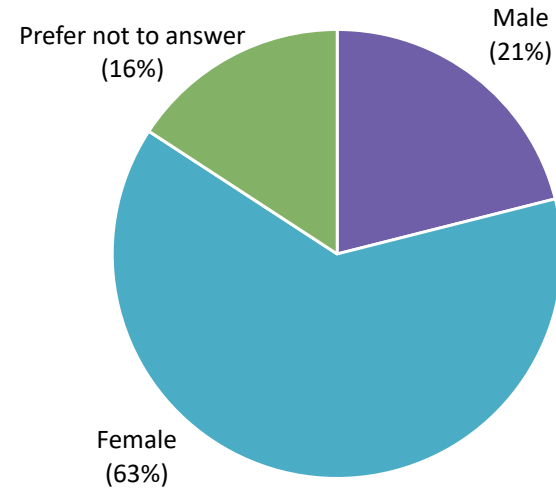
Gender

Figure E-4 shows that nearly two-thirds of survey respondents identified as female (63%) and one-fifth identified as male (21%) The remaining respondents preferred not to answer (16%).

Race and Ethnicity

Figure E-5 shows the race and ethnicity of survey respondents. Among those who reported their race and ethnicity, 14 identified as white and four identified as Hispanic.

E-4. Gender of survey respondents



Note: N=19. No respondents identified as non-binary.

Source: Keen Independent Research.

E-5. Race and ethnicity of survey participants

| Race and ethnicity | Response |
|---|----------|
| White | 14 |
| Hispanic or Latino | 4 |
| Black or African American | 1 |
| Other | 1 |
| Asian | 0 |
| American Indian and/or Alaskan Native | 0 |
| Native Hawaiian and/or Pacific Islander | 0 |
| Prefer not to answer | 3 |

Note: N=19. Participants could select more than one answer.

Source: Keen Independent Research.

E. User and Key Stakeholder Feedback – Survey demographics

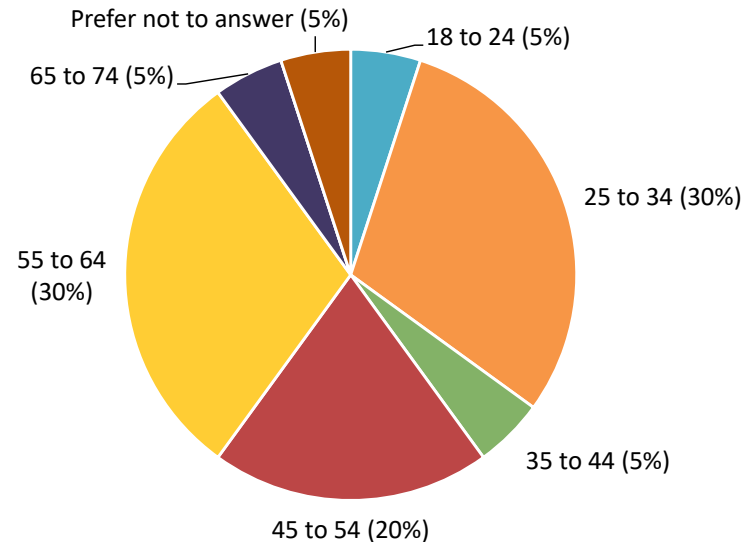
Age

Figure E-6 depicts the ages of individuals who completed the survey. The survey captured a wide range of ages. Thirty percent of respondents were either ages 25 to 34 or 55 to 64 and twenty percent were ages 45 to 54.

Other Demographic Identifiers

Keen Independent invited survey respondents to share additional demographic identifiers that may help the study team understand their experiences or the experiences of other members of their household. There were five respondents who shared additional identifiers and 11 respondents selected “no additional identifiers to share.” Figure E-7 shows the demographic self-identification of respondents.

E-6. Age of survey respondents



Note: N=19. No respondents identified as under 18.

Source: Keen Independent Research.

E-7. Demographic self-identification of survey participants and/or their household members

| Other demographic identifiers | Number of responses |
|------------------------------------|---------------------|
| No additional identifiers to share | 11 |
| Veteran/military | 2 |
| Disability status | 2 |
| Bilingual/multilingual | 2 |
| LGBTQ+ | 2 |
| Other | 0 |

Note: N=19. Participants could select more than one answer.

Source: Keen Independent Research.

E. User and Key Stakeholder Feedback – Survey demographics

Affiliation with WestWorld

Figure E-8 depicts survey respondents' affiliations with WestWorld. Most respondents, a total of 25, were City of Scottsdale employees who do not work at WestWorld. Five participants were WestWorld employees and one participant identified as an exhibitor or performer at a WestWorld event.

E-8. Survey participants reported affiliations with WestWorld

| Affiliation with WestWorld | Number of responses |
|--|---------------------|
| City of Scottsdale employee (not at WestWorld) | 25 |
| WestWorld employee | 5 |
| WestWorld event exhibitor or performer | 1 |
| WestWorld contractor or vendor | 0 |
| Other | 1 |
| No affiliation to WestWorld | 1 |

Note: N=31. Participants could select more than one answer.

Source: Keen Independent Research.

APPENDIX F. Benchmark Research — Introduction

Keen Independent conducted background research on three benchmark venues to inform the strategic planning and goal setting process for WestWorld.

Methodology

The study team worked with WestWorld staff to select benchmark venues using criteria such as:

- Location within a major metro area market;
- Mix and size of equestrian arenas, expo halls and other multi-purpose event spaces;
- Availability of horse boarding and RV camping; and
- Presence of major signature annual event(s).

Venue Selections

The study team selected the following venues as national benchmarks for WestWorld:

- Will Rogers Memorial Center (Fort Worth, TX);
- National Western Center/National Western Complex (Denver, CO); and
- OC Fair and Event Center (Costa Mesa, CA).

Keen Independent interviewed venue representatives and conducted additional background research to develop the venue profiles on the following pages.

Key Takeaways

The following are key takeaways from this benchmark research:

- All benchmarked venues utilize some form of event management software;
- Rental rates for event space, labor and equipment are itemized at all benchmarked venues; and
- Annual operations at benchmarked venues are subsidized either by a major high-impact event or by government funding, with one venue’s operational deficit being primarily covered by a Hotel Occupancy Tax.

F-1. Availability of horse boarding and RV camping at benchmarked venues

| Name | Location | Horse boarding | RV camping |
|---------------------------------|----------------|----------------|------------|
| OC Fair and Events Center | Costa Mesa, CA | Yes | Yes |
| Will Rogers Memorial Center | Fort Worth, TX | Yes | Yes |
| National Western Center/Complex | Denver, CO | Yes | No |

Source: Keen Independent Research.

F. Benchmark Research — Will Rogers Memorial Center

Will Rogers Memorial Center (WRMC) is a 120-acre multi-purpose facility in Fort Worth, Texas that hosts a variety of equestrian, agricultural, entertainment, corporate, educational, social and sporting events, including many international and high-impact shows.

Ownership and management structure. The City of Fort Worth owns and operates the Will Rogers Memorial Center.

Venues. The Will Rogers Memorial Center includes:

- Historic Will Rogers Coliseum (5,652 seats);
- Will Rogers Auditorium (2,856 seats);
- Amon G. Garter, Jr Exhibits Hall (94,000 square feet); and
- Additional equestrian and livestock facilities with an underground tunnel system.

Annual attendance. The venue hosts more than two million attendees per year.¹

Annual budget. According to WRMC fiscal year 2024 financials, the facility has about \$16 million in annual expenses and about \$10 million in annual revenue. The deficit is primarily subsidized by Hotel Occupancy Taxes (HOT).

Event load. WRMC holds about 200 events per year, with most of these events being with repeat clients.

F-2. Will Rogers Memorial Center



Source: City of Fort Worth.

F-3. Aerial view of Will Rogers Memorial Center



Source: City of Fort Worth.

¹ <https://www.fortworth.com/will-rogers-memorial-center/>

F. Benchmark Research — Will Rogers Memorial Center

Event management and booking system. According to a WRMC venue representative interviewed by Keen Independent, the venue utilizes Momentus for event booking and management.

Number of staff. The Culture and Tourism Fund, which includes operations for WRMC and the Fort Worth Convention Center has 158 positions equating to about 147.60 full-time equivalent staff.

Strategic focus. As part of the City’s Public Events Department, WRMC aligns with the department’s overall strategic direction. Department strategic goals include:

- Achieve an average Customer Experience Satisfaction score of 75 percent or better for the Public Events Department;
- Increase Social Media presence across all platforms by 10 percent;
- Keep the percentage of reliance on HOT for Public Events Department operations under 30 percent;
- Revise/Review/Improve at least four business processes per fiscal year, per division WRMC, FWCC, ADMIN; and
- 100 percent of team members engaged in professional development activity per fiscal year.

Rate structure. The space, equipment and labor rate structure for WRMC is itemized and subject to City Council approval. The rate structure is uniform and applies to all events except the Fort Worth Stock Show and Rodeo, which is the venue’s oldest client and in a public-private partnership with the City.

Incentives. According to the venue representative interviewed by Keen Independent, WRMC does not offer incentives to bring high-value events to the venue. However, its nonprofit partner, Visit Fort Worth, could help with funding incentives to bring high-value events.

F-4. Equestrian facility at Will Rogers Memorial Center



Source: Visit Fort Worth.

F-5. Historic Will Rogers Coliseum



Source: Visit Fort Worth.

F. Benchmark Research — National Western Center/National Western Complex

National Western Center is a 250-acre campus in Denver, Colorado that is being constructed in partnership with the City and County of Denver, the National Western Stock Show, CSU Spur, History Colorado and Denver Museum of Nature and Science.

Ownership and management structure. The National Western Center is owned by the City and County of Denver and operated by the National Western Center Authority, a 501c6 nonprofit. The National Western Center campus is adjacent to the National Western Complex, which is owned and operated by the National Western Stock Show.

With the National Western Complex facilities aging and becoming too small for the National Western Stock Show, the National Western Stock Show provided funding for the National Western Complex. While still in the planning stages, there is conversation around eventually replacing the old National Western Complex facilities and being completely converted into the National Western Center.

Venues. National Western Center currently includes the Stockyards Event Center which comprises:

- Wagner Equipment Co. Auction Arena (630 seats);
- Stow L. Witwer Memorial Show Arena (17,500 square feet);
- Cille and Ron Williams Yards (14-acre flexible hardscaped space); and
- Two outdoor plazas (one acre each).

Note that additional facilities at National Western Center are being planned and under construction.

F-6. National Western Center campus map



Source: National Western Center.

F. Benchmark Research — National Western Center/National Western Complex

Annual budget. With the National Western Center Authority and National Western Stock Show being two separate entities, a concise operating budget for the venue is not available. However, according to a representative of the National Western Complex who was interviewed by Keen Independent, the National Western Stock Show generates significantly more revenue than the other events that take place there.

Event management and booking system. According to a National Western Center venue representative, the venue utilizes Tripleseat for event booking and management.

Strategic focus. The mission of the National Western Center Authority is to “convene the world at the National Western Center to lead, inspire, create, educate and entertain in pursuit of global food solutions.”

Rate structure. The space, equipment and labor rate structure for National Western Center is itemized. The Authority offers discounts to community and nonprofit organizations. This rate structure is uniform for all events except the National Western Stock Show, which is a key partner and funder for the National Western Center.

Incentives. According to the venue representative interviewed by Keen Independent, National Western Center does not offer incentives to bring high-value events to the venue.

F-7. Stockyards Event Center at National Western Center



Source: National Western Center rental brochure.

F. Benchmark Research — OC Fair and Event Center

Positioned across 130 acres, OC Fair and Event Center is located in Costa Mesa, California and home to the OC fair, which attracts more than one million attendees annually.

Ownership and management structure. The OC Fair and Event Center is owned and operated by the 32nd District Agricultural Association, an institution of the state of California.

Venues. OC Fair and Event Center venues include:

- Action Sports Arena (about 7,000 seats);
- Pacific Amphitheater (about 8,500 seats); and
- Seven exhibit halls and other additional meeting and multipurpose areas (about 157,000 square feet).

Annual budget. The annual budget for the OC Fair and Event Center separates financials for the State Fair from the rest of the venue’s annual operating expenses. When including the State Fair, the fiscal year 2025 budget illustrated annual expenses of about \$59 million and \$5 million in net revenue. Excluding the State Fair, annual operating expenses were approximately \$30 million with a deficit of about \$17 million.

Event management and booking system. According to an OC Fair and Event Center representative contacted by Keen Independent, the venue utilizes Momentus for event booking and management and for generating contracts.

Strategic focus. The mission of the OC Fair and Event Center is to “enhance equitable community access to agriculture, entertainment, cultural and educational experiences.”

Rate structure. The space, equipment and labor rate structure for OC Fair and Event Center is itemized.

F-8. OC Fair and Event Center facilities



Source: OC Fair and Event Center.

APPENDIX G. Implementation Tracking

Keen Independent has provided WestWorld staff with a multifaceted, flexible tool for visualizing, coordinating, tracking and reporting implementation of the strategic plan. Appendix G describes and illustrates uses of the tool for tracking and reporting progress.

Figure G-1 depicts a sample dashboard view. Columns on the right allow tracking and reporting on progress to date by stage and status, actual metrics achieved and notes.

Provided drop-down options include:

- NA/Not yet expected;
- Not started;
- Initiated;
- In progress; and
- Completed.

Provided drop-down menu options for status include:

- NA/Not yet expected;
- Progressing;
- Delayed;
- Stuck/blocked; and
- Completed.

In Figure G-1, tracking fields are populated with mock-up data for illustration purposes only.

APPENDIX G. Implementation Tracking

G-1. Sample dashboard view

| PRIORITY TWO | Lead role | Start by M-Yr | Due by M-Yr | Example metrics/ success indicators | Progress to date Stage | Status | Actual metrics/ progress to date | Notes | |
|---|--|-----------------|-------------|-------------------------------------|--|-------------|----------------------------------|---|--|
| 2. Strengthen and unify our organization | | | | | | | | | |
| 2-1. Improve consistency and standardization across all business processes | | | | | | | | | |
| a. | Standardize policies and operational procedures to ensure consistent practices across the organization | General Manager | Jul-26 | Jun-28 | Policy and operational policy needs inventoried and prioritized. Then 100% of policy and operational procedure priorities completed and adopted. | Completed | Completed | SOPs completed and adopted | |
| b. | Provide training and communication to ensure all staff follow unified processes and expectations | General Manager | Jul-27 | Jun-29 | 100% of staff trained on unified processes. All staff compliant with processes | Initiated | Progressing | | Training processes under development |
| c. | Improve the RV reservation system to enhance usability and client experience* | RV Office lead | Apr-26 | Apr-27 | Track the number of instances in which RV staff were needed to step in and provide customer assistance when the system was not successful at competing the reservation process | Completed | Completed | Customer issued reduced by 10% in 2027 | Annual tracking in progress |
| 2-2. Improve communication throughout the customer journey, from sales to service delivery and follow up | | | | | | | | | |
| a. | Strengthen communication workflows to ensure timely, accurate information sharing among staff and with clients | Director | Mar-26 | Jun-27 | Communication protocol adopted | Initiated | Progressing | Event communications worksheets developed | Regular touch bases with Police and Fire at least two weeks before event load in |
| b. | Hold regular production meetings to align teams and address operational needs in advance | Director | Mar-26 | Jun-31 | Develop a system to determine which events will require pre-event production meetings and in-turn ensure that the meetings take place | In progress | Progressing | Production meetings taking place before all Priority One events | |