



VISIT  
MESA

CITY LIMITLESS®



# Sports Tourism as an Economic Driver for NE Mesa

- **Our Vision: Multi-Field Sports Complex**
  - NE Mesa, 18-24 fields all lighted on one campus (estimated 70-100 acres)
  - Field dimension (225'x360' each). Each field is roughly 2 acres
  - Mix of Sand-based, natural turf and artificial turf
  - Tournament/Event rental only facility (Not open to local clubs for training except on artificial fields)
  - Re-seeded annually (Tiffway 419 Hybrid Bermuda)
  - locker/dressing rooms area
  - 4-6 artificial turf fields recommended



# “BUILD IT AND THEY WILL COME.” REALLY? HOW DO WE KNOW?

- No longer is soccer the sport of the future...
- Soccer's fans are young and growing. The two demographic groups most passionate about soccer are young adults -- those ages 18 to 29 -- and Hispanics. Demographers expect the Hispanic population to triple by 2050 making up roughly one-third of the population
- In 1974, the U.S. Youth Soccer Association registered only about 100,000 players. Today that number is over 3 million (Does not include AYSO which boasts over 50K teams and over 630K participants, YMCA and other organizations offering organized play).
- A recent ESPN sports poll found that 30 percent of American households have at least one member who plays soccer. As parents contemplate the risk of traumatic head injuries from football, soccer may continue to become an attractive alternative.



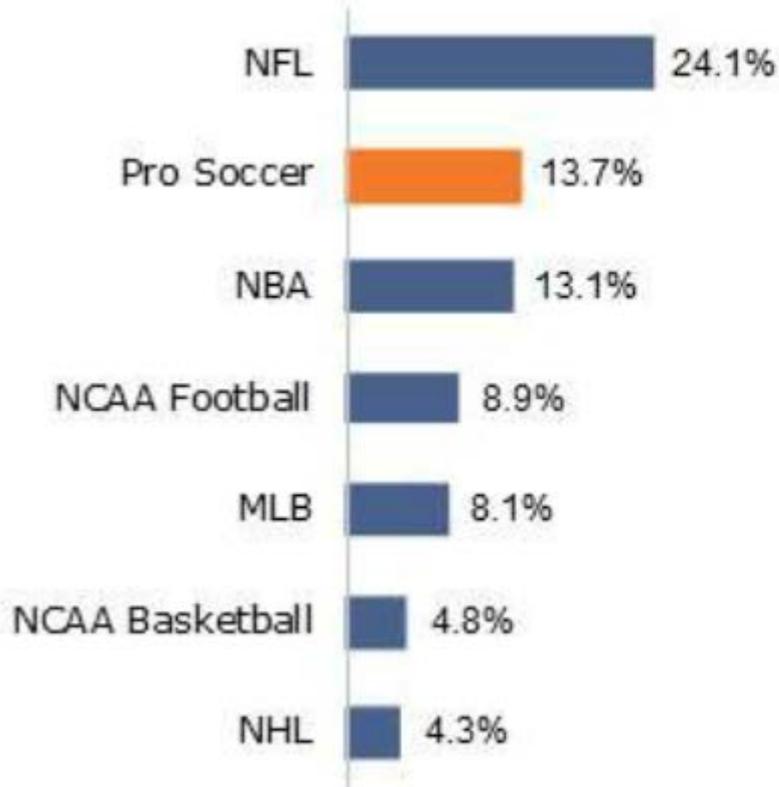
## “BUILD IT AND THEY WILL COME.” REALLY? HOW DO WE KNOW?

- As soccer's popularity continues to grow stateside, MLS has added nine new clubs since 2007 (two of which, the most recent additions, will begin play in 2015). MLS started in 1996. By 2019, there will be 24 teams.
- The 19 MLS teams are averaging 18,716 fans per game in 2014-- over 1,000 higher than the average attendance at NHL and NBA games last season. New York City FC and Orlando City FC are slated to begin play in 2015, the first year of an eight-year broadcast deal with ESPN, Fox and Univision reportedly worth \$720 million. Atlanta
- The ESPN Sports Poll Annual Report, which is managed by Luker on Trends, interviews 1,500 Americans per month and tracks interest in 31 different sports. In 2012, the poll determined soccer was America's second-most popular sport for those aged 12-24, ahead of NBA, MLB and college football. Respondents are asked to rank their affinity for sports (how avid a fan they are), athletes, sponsorships and other trends.
- "While there are questions about which direction MLB will go in for 12- to 17-year-olds, we have no reason to believe the trend for MLS will be anything but up."



# “BUILD IT AND THEY WILL COME.” REALLY? HOW DO WE KNOW?

## ▼ Age 12-24: Favorite sport



## ▼ Hispanics: Favorite sport

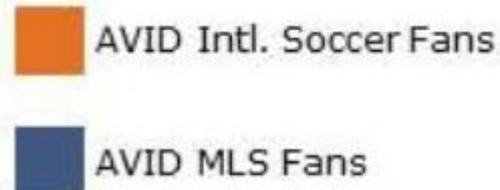
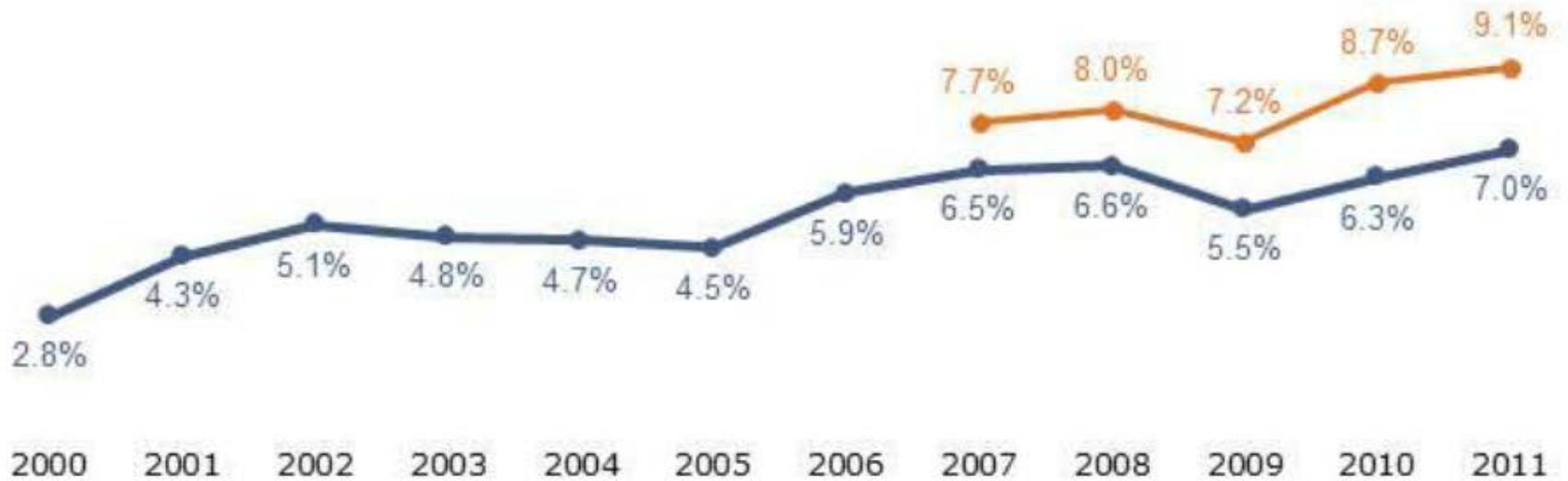


\*Pro soccer includes both international soccer & MLS



# “BUILD IT AND THEY WILL COME.” REALLY? HOW DO WE KNOW?

▼ % of USA 12+ who are AVID Soccer fans





## OK BUT WHAT ABOUT THIS PROPOSED FACILITY...WHY WOULD IT WORK HERE?

- Organizers of elite-level tournaments seek elite-level facilities on which their elite-level travel teams can play.
- Elite-level teams are the ones which travel extensively and because they travel often, the teams select only the best tournaments at the best locations.
- Split campus operations are no longer acceptable. Too many other options in other cities and too expensive
- No saturation. Arizona lacks quality facilities.
- Current facilities have significant limitations (Ex: Reach 11, SSC w/Phoenix Open)
- East Valley clubs no longer hold their top tournaments in the East Valley (Reach 11 and SSC).
- Putting it in the Falcon Field Region makes sense to Visit Mesa...helps us ensure most of the hotel rooms are consumed in Mesa
- Benedictine University Mesa building a sports program and will need facilities



## Visit Mesa - Sports

- July 2012-Present VM Sales Production:
  - 50,668 booked room nights
  - Over \$40M estimated visitor spending from youth/amateur sports (source: DMAI EIC calculation)
  - Year round dollars and efforts are spent to attract events with out of state attendees to come to Mesa, as well as assist and strengthen locally created events
  - Visit Mesa already has a cooperative effort with key local partners like City of Mesa PRCF, MPS, MCC, MAC, hotels, etc.



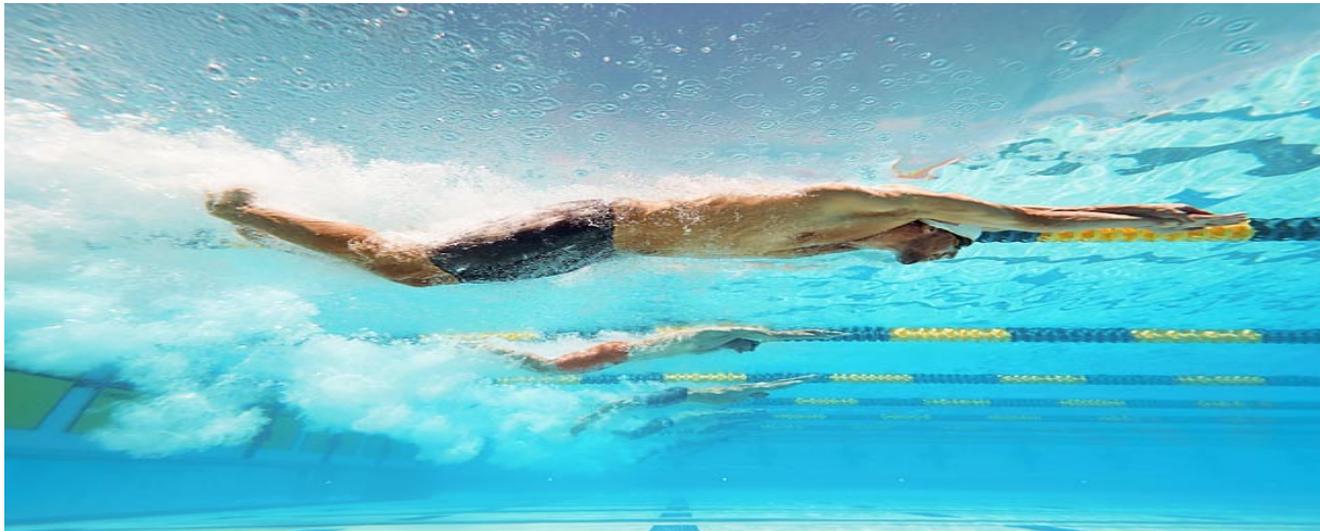
## Visit Mesa – Sports Cont'd

- **2013/14 Major Mesa Events**
  - USA Swimming Grand Prix:
    - 700+ attendees, 1000+ room nights, EDVS: \$600,000
  - NJCAA National Track & Field Championships
    - 800+ attendees, 1500+ room nights, EDVS: \$750,000
  - WAC Baseball Tournament
    - 350+ attendees, 800+ room nights, EDVS: \$512,000
  - Triple Crown Spring Nationals (Baseball)
  - Under Armour Baseball Factory (Baseball)
  - Prospectwire West Coast Finals (Baseball)
  - NJCAA Golf Nationals, Longbow
  - Notre Dame Clover Cup, Longbow
  - Phoenix Invitational Track Meet
  - Citrus Classic Winter Training (Swim/Dive)
  - Phoenix Marathon



## Visit Mesa - Sports

- Sports events help advance our Mesa City Limitless brand nationally
  - i.e. Glendale, Louisville, Indy, etc. (press/television)
  - Mesa Grand Prix (Michael Phelps)
- Sports events reach more people organically
  - Recession Proof Market





# NATIONAL SPORTS TOURISM INDUSTRY AT A GLANCE

- 2011
  - Visitor Spending = \$7.68 billion (6.5% increase over 2010)
  - Growth in events hosted = +10.5%
  - Sports Visitors hosted = 23.9 million
- 2012
  - Visitor Spending = \$8.3 billion (9% increase over 2011)
  - Growth in events hosted = +10.36%
  - Sports Visitors hosted = 27.5 million
- 2013
  - Visitor Spending = \$8.7 billion (5% increase over 2012)
  - Growth in events hosted = +3.7%
  - Sports Visitors hosted = 28.5 million

\*Source: National Association of Sports Commissions (NASC) 2012-2014 Annual State of the Industry Reports



# DIRECT VISITOR EXPENDITURES FY COMPARISON

- FY 2013-14 = \$43,749,679\*
- FY 2012-13 = \$16,139,423\*  
\$27.6M Increase Y/Y
- City of Mesa's investment in Visit Mesa in FY 2013-14 = \$1,953,069.24
- For every \$1 invested in Visit Mesa by the City of Mesa there is a return of \$22.40 in estimated future direct expenditures

\*Source: DMAI Impact Calculator



## FYTD Booked Room Nights

Fiscal Year	# of Booked Rooms Nights
2006	11,381
2007	12,801
2008	25,035
2009	21,362
2010	17,385
2011	19,561
2012	11,244
	Visit Mesa
2013	38,612
2014	49,788



# JAN - JUN 2014 HOTEL PERFORMANCE

## January vs 2013

Occupancy: +10%  
Average Daily Rate: -0.6%  
Revenue Per Available Room: 9.3%

## February vs. 2013

Occ: +8.8%  
ADR: +2.7%  
RevPar: +11.7%

## March vs. 2013

Occ: +7.1%  
ADR: +4.8%  
RevPar: +12.3%

## April vs. 2013

Occ: +9.8%  
ADR: +4.0%  
RevPar: +14.2%

## May vs. 2013

\*Occ: +17.7%  
ADR: +2.2%  
\*RevPar: +20.2%

## June vs. 2013

Occ: +5.5%  
ADR: +1.6%  
RevPar: +7.1%

## 2014 YTD

**Occ: +7.9%**  
**ADR: +2.1%**  
**RevPAR: +10.2%**

\*Led all Valley cities in  
y/y growth by a  
significant margin

Source: Smith Travel Research (STR)



# Sports Mega Complexes

## A Few National Examples...



# National Sports Center: Blaine, MN



- 650 acres
- Largest amateur sporting complex in the world
- 60+ soccer fields, premiere ice rinks, 9000 seat stadium
- Annual visitors: 4 million (2013)
- Annual hosted events: 100+
- Estimated Annual Economic Impact: \$38million, \$2.3million state tax revenue, \$800K city/local tax revenue



# Reach 11 Sports Complex: Phoenix



- 17 lighted full size grass soccer fields, 1 artificial turf
- Limited by Federal BOR regulations (charging gate or parking prohibited)
- Closed June, July, and August
- Voted Top 5 Soccer Complex in USA by Collinson Media & ConnectSPORTS, a publication for National Governing Bodies and Sports Events Rights Holders
- Annual visitors: 4 million
- Annual hosted events: 55 (2013/14)
- Estimated EDVS: N/A



# Overland Park Soccer Complex: Kansas



- 96 acres
- 12 lighted synthetic turf fields
- Voted 'top soccer complex' in USA
- Annual visitors: 800,000 (2013)
- Annual hosted events: 23 (2013)
- Estimated Economic Impact: \$6-\$8million; 27,000 associated soccer room nights generated (2013)
- Quote from Mike LaPlante, GM in year end report: "Moving forward, the Soccer Complex continues to be recognized as one of the premier facilities in the country. However, new complexes continue to popup that will significantly threaten our ability to host future large, national events. While staff is monitoring the development of these facilities, we strongly feel that in order to remain relevant in the marketplace, serious consideration needs to be given to future expansion, i.e. more fields, in order to remain competitive."



# Grand Park: Westfield, IN



- 26 baseball fields, 31 soccer/multipurpose fields, \$20million indoor facility being constructed (335K sq. ft.)
- 450 acres
- 30 minutes north of Indy, Hamilton County
- Opened in March 2014
- Annual visitors: 1.5 million (expected, 400K to date)
- Annual hosted events: 18 (June-Dec 2014)
- Estimated Economic Impact: \$1.04 billion 5 year total, \$30million expected in 2014



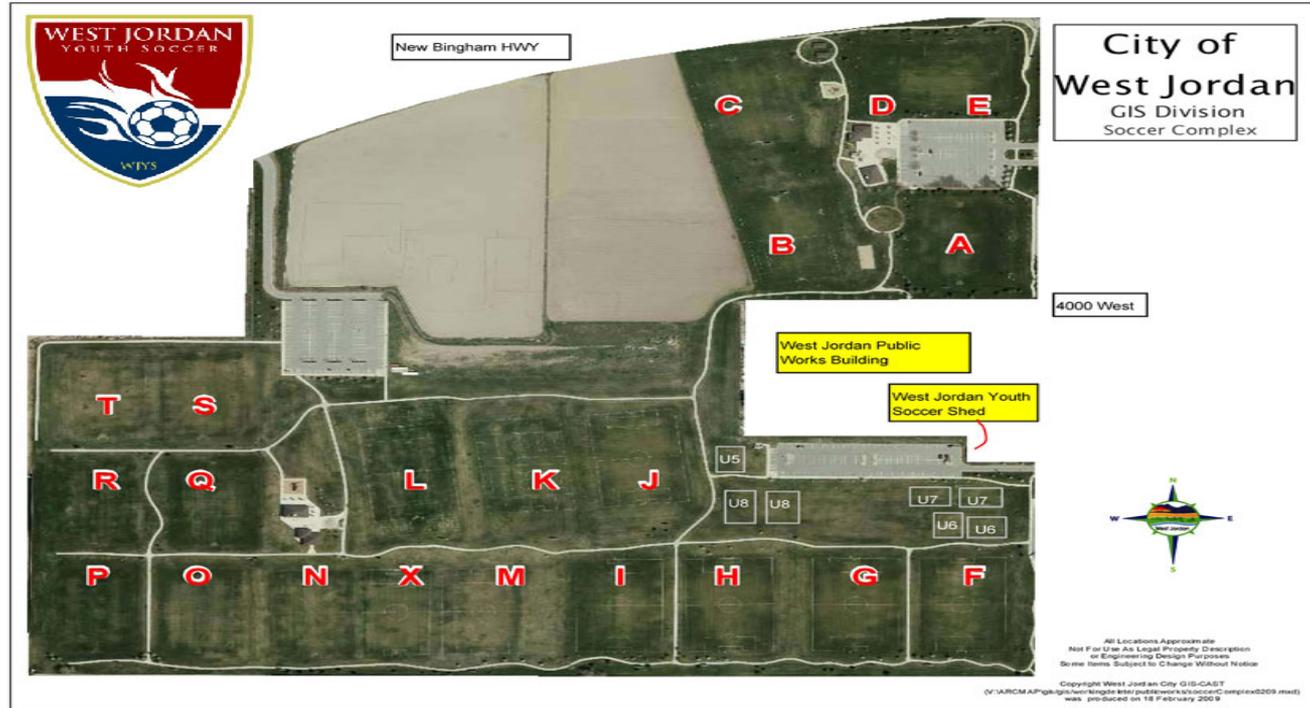
## San Bernardino Soccer Complex: California



- 17 premium turf fields
- 50 acres, 1600 parking spots
- Annual visitors: 350,000 (2013)
- Annual hosted events: 16+ (2013)
- Estimated Annual Economic Impact: \$4-5million



# Utah Youth Soccer Complex: West Jordan/Sandy



- 120 acres
- 20 soccer fields
- Annual visitors: 350,000 (2013)
- Annual hosted events: N/A
- Estimated Economic Impact: N/A



# Toyota Soccer Center: Frisco, Texas



- 145 acres
- 17 soccer fields plus stadium for FC Dallas
- Annual visitors: 1million+ (2013)
- Annual hosted events: 100+ (concerts, pro games incl.)
- Estimated Economic Impact: N/A
- Public/Private partnership: City of Frisco, school district, Collin County, Hunt Sports Group
- \*City of Plano, TX also has a 21 field soccer/cricket complex nearby called Russell Creek Park...not afraid of competing against each other for events!





## State Farm Soccer Complex: Santa Ana Pueblo, NM (Albuquerque)



- 161 acres
- 22 soccer fields
- Annual visitors: 120,000 (2010)
- Annual hosted events: 20+
- Estimated Economic Impact: \$20million (2010)



TIMELESS  
BOUNDLESS  
LIMITLESS

