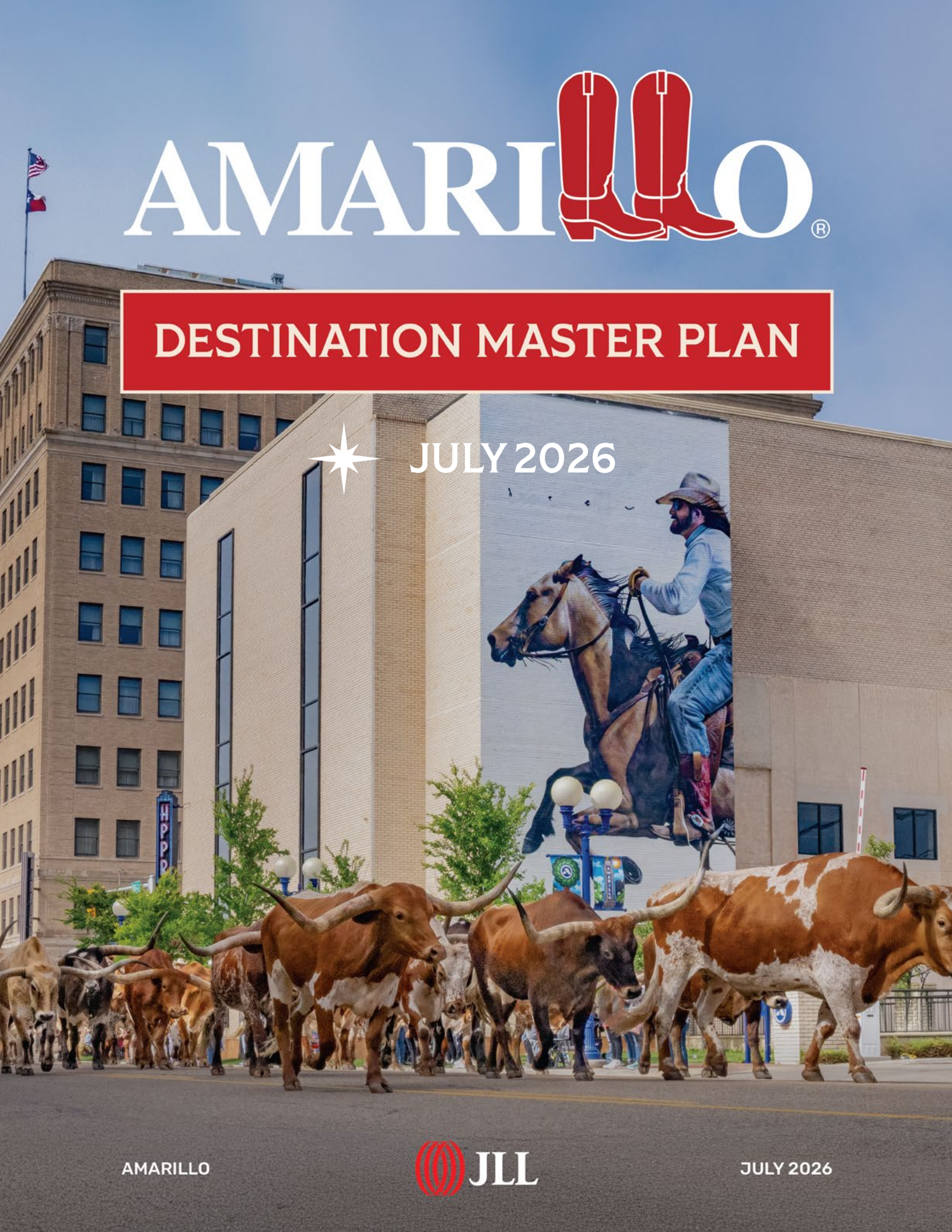


The background of the entire page is a photograph of a city street scene. In the foreground, a herd of longhorn cattle is walking across the street. In the background, there are several multi-story brick buildings. One building has a large mural of a cowboy on a horse. A red banner is overlaid on the image.

AMARILLO®

DESTINATION MASTER PLAN



JULY 2026



CONTENT

This 10-year forward looking plan provides a narrative roadmap to guide resource allocation, policy decisions, and partnerships related to Amarillo’s visitor economy. It is not a marketing plan, nor a single-project justification. Instead, it establishes a shared long-term direction that aligns community priorities with realistic market opportunities.

INTRODUCTION	6
WHY A STRATEGIC PLAN	8
EXECUTIVE SUMMARY	10
RECOMMENDATIONS	12
IMPLEMENTATION	20
APPENDIX	26



HELLO ✨

Community Leaders, Partners, Residents, and Stakeholders,

On behalf of Visit Amarillo, I am pleased to present the Amarillo Destination Master Plan—a shared vision for the future of our community and a roadmap for how tourism can continue to strengthen Amarillo over the next decade.

This plan represents far more than a tourism strategy. It is a long-term framework for economic development, quality of place, destination stewardship, and community prosperity. Developed through extensive stakeholder engagement, market analysis, industry research, and community input, the plan reflects the aspirations of those who live, work, invest, and visit Amarillo.

Amarillo occupies a unique position in the American landscape. As the economic and cultural hub of the Texas Panhandle, our city is distinguished by its entrepreneurial spirit, western heritage, outdoor assets, arts and culture, and unmatched sense of authenticity. From our historic Route 66 legacy and vibrant downtown to emerging recreation, sports, and entertainment opportunities, Amarillo has the foundation to become one of the most compelling destination experiences in the Southwest.

The recommendations contained within this plan are designed to build upon these strengths while preparing our community for future opportunities. They provide a clear path toward enhancing visitor experiences, supporting local businesses, attracting investment, growing year-round visitation, strengthening our workforce, and improving the amenities and quality of life enjoyed by residents. Importantly, this plan recognizes that successful destinations are first and foremost great places to live. The initiatives outlined herein are intended to create benefits that are shared by residents and visitors alike.

The development of this Master Plan was guided by a commitment to collaboration. We extend our sincere appreciation to the many stakeholders, community leaders, elected officials, business owners, tourism partners, and residents who contributed their perspectives throughout this process. Your insights helped shape a plan that is both ambitious and grounded in the realities and opportunities facing Amarillo today.

Implementation will be the true measure of success. While this document establishes a ten-year vision, it also identifies actionable priorities, measurable outcomes, and strategic investments that can begin immediately. As our community continues to evolve, this plan will serve as a living guide—one that helps align public and private sector efforts around a common vision for Amarillo's future.

The opportunities before us are significant. By working together, we can continue to elevate Amarillo's profile as a destination, strengthen our economy, celebrate our unique identity, and create lasting benefits for generations to come.

Thank you for your partnership, leadership, and commitment to the future of Amarillo.

Sincerely,

Kashion Smith
President & CEO
Visit Amarillo



WHY A DESTINATION MASTER PLAN FOR AMARILLO?



A Destination Master Plan provides the vision, framework, and implementation strategy needed to guide Amarillo’s tourism and destination development efforts over the next decade. As the city continues to grow and evolve, it is increasingly important to align tourism, economic development, quality-of-place investments, and community priorities around a shared vision that strengthens Amarillo’s competitiveness while enhancing the experience for residents and visitors alike. This plan creates a data-driven roadmap to identify opportunities, prioritize investments, and maximize the long-term economic and community benefits generated by the visitor economy.

More than a planning document, the Destination Master Plan serves as a practical management tool that connects strategy with action. It establishes clear priorities,

measurable outcomes, and coordinated initiatives across public, private, and community stakeholders. The plan evaluates opportunities to strengthen Amarillo’s destination assets, support district development, expand visitor experiences, enhance tourism infrastructure, and position the city to attract new investment, events, and visitors.

By taking a proactive approach to destination development, Amarillo can capitalize on emerging opportunities while preserving the authentic character and cultural assets that make the community unique. The Destination Master Plan provides the foundation for sustainable growth, ensuring that tourism continues to serve as a catalyst for economic vitality, community pride, and long-term prosperity for Amarillo and the Texas Panhandle region.



THE LONG TRAIL:

AMARILLO'S
10-YEAR PLAN
FOR THE VISITOR
ECONOMY

EXECUTIVE SUMMARY



Over the next decade, Amarillo has a defining opportunity to bolster itself within the Texas and national visitor economy. Long known as a pass-through stop along major highway corridors, the community possesses the raw materials to evolve into a multi-day destination rooted in authentic Western culture, large-scale events, and outdoor experiences. Achieving this shift will require alignment across the community, disciplined investment in infrastructure, and a clear focus on experiences that generate overnight visitation.

This Destination Master Plan establishes a long-term framework for that evolution. It is grounded in the substantive work of the staff at Visit Amarillo, the dedicated steering committee, and numerous local stakeholders and engaged community members. The plan is organized around three mutually reinforcing priorities: community alignment, an expanded event and experience ecosystem, and addressing the future development of the Amarillo Civic Center as a catalytic anchor.

First, the plan recognizes that sustainable destination growth must be community-led, and community supported. Amarillo's independent and pragmatic culture demands transparency, education, and local ownership of tourism outcomes. A focused outreach and engagement program is therefore foundational to the plan, ensuring residents understand how tourism supports jobs, small businesses, and public amenities while preserving the city's heritage.

Second, the plan positions events as the primary near- and mid-term driver of overnight visitation. Amarillo's Western identity, ranching heritage, industry innovation, and growing cultural momentum provide a strong platform for rodeo, livestock, cultural festivals, concerts, and large community gatherings. By organizing events (using the event matrix) into a clear hierarchy—from signature anchor events to community-scale programming—the destination can grow demand strategically while maximizing return on investment.

Third, the plan identifies the Civic Center as the single most important long-term tourism-related asset around which further planning and alignment must happen. In its current condition, the facility limits Amarillo's ability to attract major concerts, conventions, and multi-day events. Reimagined and updated as part of a broader Civic Center District, the facility can serve as the backbone of an integrated entertainment and event campus that connects downtown, the Fairgrounds, and Route 66. From 2026–2036, this plan envisions Amarillo emerging as a nationally recognized destination. One that is rooted in authentic Western experiences, energized by signature events, and anchored by a revitalized civic core, leveraging the strength of the I-40 corridor to elevate economic vitality and community quality of life for generations. Success will be measured not only in visitor numbers and impact, but in community confidence, economic resilience, and pride of place.



RECOMMENDATIONS

The Amarillo Destination Master Plan represents far more than a roadmap for tourism growth; it is a shared vision for the future of the city and the broader Texas Panhandle region. Grounded in data, informed by community perspectives, and shaped through collaboration, the plan establishes a clear path forward for leveraging Amarillo's unique assets to enhance economic vitality, strengthen quality of life, and elevate the city's position as a leading destination in the American West. By aligning destination development with community priorities, Amarillo is poised to create experiences and places that benefit both residents and visitors for generations to come.

As Amarillo continues to evolve, this plan provides a strategic framework to guide investments, development decisions, destination management, and partnership opportunities. It identifies priorities that can strengthen the city's tourism economy while advancing broader goals related to downtown revitalization, placemaking, cultural development, outdoor recreation, events, and quality-of-place enhancements.

Through clear recommendations, implementation strategies, and measurable outcomes, the Destination Master Plan creates a foundation for coordinated action across public agencies, private-sector partners, community organizations, and residents.

Successful implementation will require sustained leadership, collaboration, and accountability. Visit Amarillo, the City of Amarillo, civic and business leaders, and community stakeholders will play a critical role in advancing the plan's vision, monitoring progress, and adapting to changing market conditions and community needs. Equally important will be continued engagement with residents, whose perspectives help ensure that destination development strengthens community pride, preserves Amarillo's authentic character, and delivers meaningful local benefits.

By embracing this vision, Amarillo is investing not only in tourism, but in its future as a vibrant, connected, and prosperous community. Through strategic investment, thoughtful destination stewardship, and a commitment to creating exceptional experiences, Amarillo can capitalize on its rich western heritage, iconic Route 66 identity, cultural attractions, outdoor assets, and entrepreneurial spirit to become a destination of choice for visitors while remaining a place that residents are proud to call home. The opportunities ahead are significant, and through collective action and shared commitment, Amarillo can establish a model for destination development that drives lasting economic and community impact over the next decade and beyond.



COMMUNITY ALIGNMENT AS THE FOUNDATION



The future of Amarillo’s visitor economy depends on public understanding and trust. While tourism delivers measurable economic benefits, local skepticism around visitor taxes and major investments has historically constrained momentum. This plan directly addresses that challenge by placing community outreach at the core of implementation.

A structured tourism education initiative that will provide residents, civic leaders, and stakeholders with clear, accessible information about how the visitor economy functions, how hotel tax revenues are used, and how events and facilities translate into local jobs and business activity. Annual briefings, transparent reporting, and consistent messaging will replace abstract economic claims with tangible, local examples.

Equally important is storytelling that centers residents rather than visitors. By elevating ranchers, artists, event organizers, restaurateurs, and hospitality workers, tourism becomes a mechanism for preserving Amarillo’s identity rather than changing it. This narrative approach reinforces pride while reducing the perception that tourism development is imposed rather than earned.

Storytelling can be achieved through many avenues, one of which is Amarillo’s growing film industry. Film is a known driver of tourism, with major productions contributing to travel increases of up to 30% in communities. As Amarillo grows its leisure markets, showcasing the city’s western heritage, landscapes, and authentic Texas story on screen can complement and accelerate that growth. Beyond visitor impact, film production supports local jobs, engages area businesses, and creates long-term visibility that extends far beyond a single event or campaign. By aligning film attraction and support efforts with the community-centered approach outlined in this plan, Amarillo can ensure that on-screen storytelling reflects local identity while generating measurable economic return.

To institutionalize engagement, the plan recommends formation of a standing Tourism and Events Advisory Council. This body would provide ongoing input on event priorities, resource prioritization, and community concerns, ensuring that decision-making reflects a broad cross-section of Amarillo’s interests.



BUILDING A DESTINATION THROUGH EVENTS AND EXPERIENCES



Events represent the most immediate and controllable opportunity to grow overnight visitation. Amarillo already possesses strong demand drivers in rodeo, ranching, and Western culture, alongside emerging momentum in arts, dining, and outdoor recreation. The strategic challenge is not whether to pursue events, but how to organize them into a cohesive system that delivers measurable results.

The plan establishes a tiered event framework. At the top are signature anchor events—multi-day, high-impact experiences capable of defining Amarillo’s brand and filling hotels at scale. These include expanded rodeo and livestock events, a flagship Western heritage or ranch rodeo festival, and touring concerts enabled by improved facilities.

Supporting these anchors are growth events that can scale over time. Cultural festivals, agritourism experiences, youth and amateur sports tournaments, and regional competitions can be strategically scheduled to strengthen shoulder seasons and broaden Amarillo’s appeal. The Amarillo International

Film Festival represents this type of growth opportunity. As a developing, multi-day cultural event rooted in Western storytelling and independent film, it has the capacity to expand programming, attract regional and national audiences, and build repeat visitation over time. Positioned strategically within the calendar, film-centered events can strengthen shoulder seasons while reinforcing Amarillo’s brand and diversifying the overall event portfolio without straying from the city’s core identity.

Finally, community and niche events play an essential supporting role. While smaller in scale, they reinforce local pride, activate districts such as Route 66, and contribute to a year-round rhythm of activity.

Event funding and support should be tied to clear performance criteria, including room nights generated, seasonal impact, and alignment with Amarillo’s Western brand. Over time, and engaging with the Event matrix tool, this disciplined approach will shift the event portfolio toward experiences that consistently extend the length of stay and create the maximum ROI from the event strategy.



CIVIC CENTER—LED DESTINATION DEVELOPMENT



The Amarillo Civic Center is the linchpin of the city's long-term competitiveness. While historically significant, the facility no longer meets the expectations of modern event promoters, touring acts, or meeting planners. Its limitations constrain Amarillo's ability to host large-scale events and weaken the city's position relative to peer markets that have reinvested in their civic infrastructure.

This plan does not prescribe a single solution, but it establishes a clear strategic direction. The Civic Center must be evaluated not as a standalone building, but as the anchor of a broader Central or Events District. This district-based approach recognizes that successful venues are supported by surrounding dining, nightlife, hotels, and public spaces that extend visitor spending beyond the event itself.

Phased feasibility and market analysis should examine renovation, expansion, and replacement scenarios, aligning scope and cost with realistic demand. The objective is not to compete with major metropolitan convention centers, but to right-size the facility for Amarillo's market. This will ensure

it remains the home of signature events like WRCA's World Championship Ranch Rodeo and Farm & Ranch Show, while restoring its competitiveness for concerts, local social and business gatherings, and regional events. Developing a five-year optimization strategy that creates a road map for the more desired mix of business will be an important next step.

Equally important is physical and experiential connectivity. Improved pedestrian links, lighting, streetscape enhancements, and safety interventions should connect the Civic Center to downtown, the Fairgrounds, and Route 66. Over time, these investments can transform fragmented assets into a cohesive event campus capable of hosting simultaneous events and festival-scale programming.

The Civic Center's evolution will also serve as a signal to private investors. A clear public commitment to modernization creates the conditions for hotel development, entertainment venues, and complementary uses that further strengthen the district. Public-private partnerships will be critical in translating civic investment into broader economic impact.



PHASING AND IMPLEMENTATION



Implementation of this plan is intentionally phased to align ambition with fiscal, political, and operational realities.

In the near term (Years 1–3), the focus is on community alignment, tourism education, establishment of KPI tracking, and completion of Civic Center feasibility and district visioning. Implementation of the event matrix, in conjunction with the city events leadership, as a tool for future decision making, will establish an engagement strategy that will ensure compliance with statutory requirements and maximize room-night generation.

In the mid-term (Years 4–7), Civic Center improvements or redevelopment should move into execution, supported by expanded signature events and measurable growth in overnight visitation. Route 66 and Fairgrounds enhancements should advance in parallel to reinforce the district concept.

In the long term (Years 8–10), Amarillo should operate as a fully realized event-driven destination, with a modernized Civic Center District, a mature year-round event calendar, and consistent performance across core KPIs.



CONCLUSION

Amarillo’s competitive advantage lies in its authenticity. This Strategic Plan charts a path that does not attempt to imitate larger markets, but instead builds on the city’s Western identity, industry dominance, community character, and emerging cultural momentum. By aligning residents, elevating events, and reinvesting in the Civic Center as a catalytic anchor, Amarillo can secure a resilient visitor economy that strengthens both economic vitality and quality of life over the next decade.



PERFORMANCE MEASUREMENT AND ACCOUNTABILITY

To ensure transparency and alignment with public funding requirements, implementation of this Strategic Plan will be guided by a concise set of high-level Key Performance Indicators (KPIs). These measures are intentionally aligned with hotel occupancy tax (HOT) for statutory purposes, emphasizing promotion, tourism-related facilities, and overnight visitation.

CORE KPIS (TRACKED ANNUALLY)

Visitation & Demand

- Total overnight visitation
- Average length of stay
- Hotel occupancy rate and average daily rate (ADR)
- Room night impact of supported events

Economic Impact

- Hotel occupancy tax collections and year-over-year growth
- Estimated visitor spending
- Direct and indirect tourism-supported employment

Event Performance

- Number of multi-day events hosted
- Share of events meeting defined room-night thresholds
- Seasonal distribution of events (shoulder and off-peak growth)
- New annual leisure events

Community & Perception

- Resident sentiment toward tourism investment (survey-based)
- Industry partner satisfaction
- Repeat visitation indicators



KPIs will be reported annually to the Visit Amarillo Board and the City of Amarillo, with a clear distinction between outcomes driven by marketing, events, and facility investment.

ALIGNMENT WITH HOTEL OCCUPANCY TAX STATUTORY PURPOSE

This Destination Master Plan is expressly aligned with the allowable uses of hotel occupancy tax revenues under Texas statute. Recommended initiatives focus on:

- Advertising and promotion designed to attract overnight visitors to Amarillo
- Support of tourism-related events that generate hotel demand
- Development and improvement of tourism-related facilities, including the Civic Center, that are directly tied to visitor activity
- Visitor information and services that enhance the overall destination experience

Image source: <https://www.thebarfield.com/>

Community outreach and education initiatives included in this plan are structured to support these statutory purposes by improving effectiveness, accountability, and public understanding of HOT-funded activities. No strategies rely on uses outside the scope of allowable expenditures.



APPENDIX

MARKET STUDY 30

TOURISM READINESS INDEX 32

EVENT MATRIX.47

DEMAND DRIVER SCORECARD 56

SWOT ANALYSIS.. . . . 63

COMMUNITY ENGAGEMENT73

STRATEGIC PROCESS. 80



MARKET STUDY

JLL's Destination Assessment for Amarillo represents a comprehensive, data-driven evaluation designed to establish the foundation for the city's 10-Year Destination Master Plan. The purpose of this phase was to develop a deep understanding of Amarillo's visitor economy, destination assets, competitive positioning, and long-term development opportunities. Through a combination of market analysis, stakeholder engagement, benchmarking, and proprietary analytical tools, the study was designed to identify the investments, experiences, and strategic priorities that can strengthen Amarillo's position as the gateway to the Texas Panhandle and one of the premier destinations in the American West.

The process began with extensive stakeholder engagement and a holistic review of Amarillo's tourism ecosystem, including visitation trends, lodging performance, event activity,

tourism infrastructure, destination amenities, and traveler behaviors. This assessment examined the city's existing strengths—including its Route 66 heritage, western culture, arts and entertainment offerings, outdoor recreation assets, and proximity to Palo Duro Canyon—while also identifying opportunities to enhance destination connectivity, visitor experiences, placemaking, and year-round demand generation. Particular attention was given to understanding how tourism can support broader economic development goals, downtown revitalization efforts, quality-of-place investments, and community aspirations.

A central component of the assessment was JLL's Tourism Readiness Index (TRI), which evaluated Amarillo's competitive position relative to peer destinations and identified opportunities to strengthen its readiness for future growth. The TRI provided insight



into destination maturity, market appeal, visitor infrastructure, and investment priorities, helping establish a framework for sustainable and strategic destination development. Complementing this analysis, JLL applied its Demand Driver Scorecard and Event Matrix, proprietary tools that evaluate the destination's ability to attract and retain visitors through factors such as attractions, events, cultural assets, public spaces, mobility, hospitality infrastructure, and experiential offerings. Together, these tools provided a clear understanding of Amarillo's strengths, development gaps, and competitive advantages, creating the analytical foundation for a Destination Master

Plan that aligns future investments with economic impact, community benefit, and long-term destination success.

The findings from this assessment serve as the basis for identifying transformational opportunities that can elevate Amarillo's visitor experience, strengthen its tourism economy, and enhance its reputation as a vibrant destination for residents and visitors alike. By combining data, stakeholder perspectives, and industry best practices, the Destination Master Plan establishes a roadmap for coordinated action, strategic investment, and sustainable growth over the next decade.

TOURISM READINESS INDEX

FRAMEWORK FOR DISCUSSION



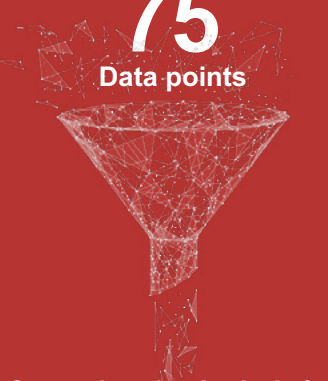
Quantitative Analysis

Covers a broad scope of factors that impact the tourism ecosystem

Quantitative analysis is complete

Starting Point for Discussion – not conclusions
Qualitative layer to add on top based on stakeholder input

Quantitative + Qualitative inputs to be paired for strategic recommendations as the process evolves



75
Data points

Comprehensive Analysis for Destination Positioning

Globally recognized tool validated by over 100 domestic and international destinations + World Travel & Tourism Council

Tourism Readiness Index Pillars	
Scale	Concentration
Leisure	Business
Environmental readiness	Urban readiness
Safety and security	Policy prioritization



DAWNING DEVELOPER



(Scored 29% out of 100%)

Amarillo is identified as a “Dawning Developer” within the Tourism Readiness Index. This classification reflects a destination with limited tourism infrastructure and gradual tourism growth. The market is at an early stage of its tourism development lifecycle and is beginning to build momentum. While current infrastructure and scale are smaller relative to more established markets, Amarillo shows clear opportunities ahead if strategic planning and targeted investment are pursued.

What This Means

As a Dawning Developer, Amarillo can:

- Capitalize on gradual tourism growth with thoughtful, proactive planning.
- Leverage opportunities for strategic development before infrastructure pressures become significant.
- Shape its tourism ecosystem to manage future capacity and preserve community character.
- Prioritize sustainable and inclusive growth to ensure long-term competitiveness.



QUANTITATIVE HIGHLIGHTS

- **Total Overnight Hotel Stays – 1,824,370:** Moderate overnight volume shows Amarillo is still growing as a destination.
- **Tourism % of GDP – 0.048%:** Tourism’s economic share is small, revealing room for expansion.
- **Airline Seat Capacity – 1,293,050:** Limited air capacity points to restricted visitor access.
- **Nonstop Destinations by Airport – 7:** Few direct flights highlight early-stage connectivity.
- **Hotel Room Inventory – 7,745:** Small hotel supply reflects a developing tourism sector.
- **Shared Home Rental Listings – 750:**Home rental options are emerging but not yet widespread.
- **Number of Visitor Attractions – 207:**Attraction count is growing, supporting future visitor interest.
- **Largest Event Venue Space – 140,000 sq ft:** Large venue capacity signals potential for bigger events.
- **Annual Mega Events – 9:** Few annual events indicate untapped potential in leisure tourism.
- **Hotel Occupancy (Annual) – 59.5%:** Occupancy rates are healthy but have room to climb.
- **Retail Goods Index – 80:** Retail spending is above average, indicating local market growth opportunity.
- **Home Rental Occupancy – 52%:** Home rentals see moderate use, hinting at a diverse lodging mix.
- **Walk Score – 40:** Walkable areas are present, but mobility could improve.
- **Number of Businesses – 8,146:** Business diversity is reasonable, supporting future tourism services.



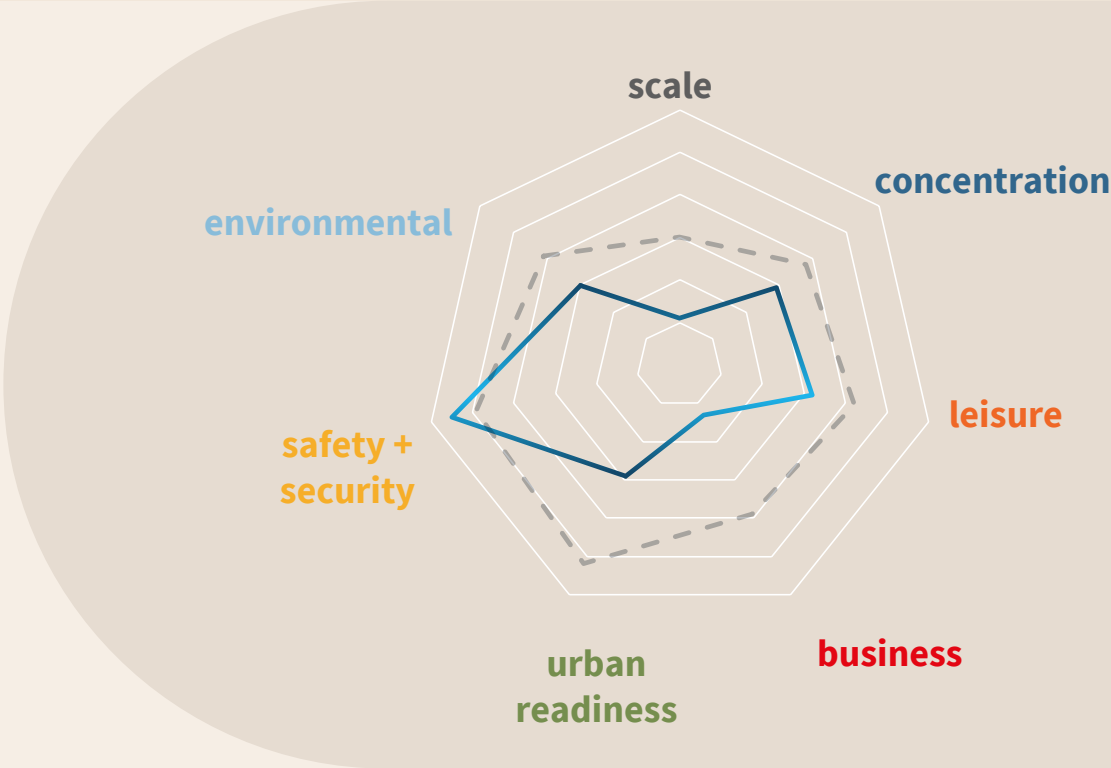
Competitive Set

County	State
Amarillo	TX
El Paso	TX
Fort Worth	TX
Lubbock	TX
San Antonio	TX
Albuquerque	NM
Oklahoma City	OK
Tulsa	OK
Cody	WY



Amarillo's competitive set includes 8 destinations.
Overall, Amarillo performs below the peer group average on most pillars.

Amarillo stands out from its competitive set average with strengths in Safety & Security.



— Amarillo — Total Comp Set Average

Scale

Compared to the comp set, Amarillo's overall tourism scale is in the lower half.

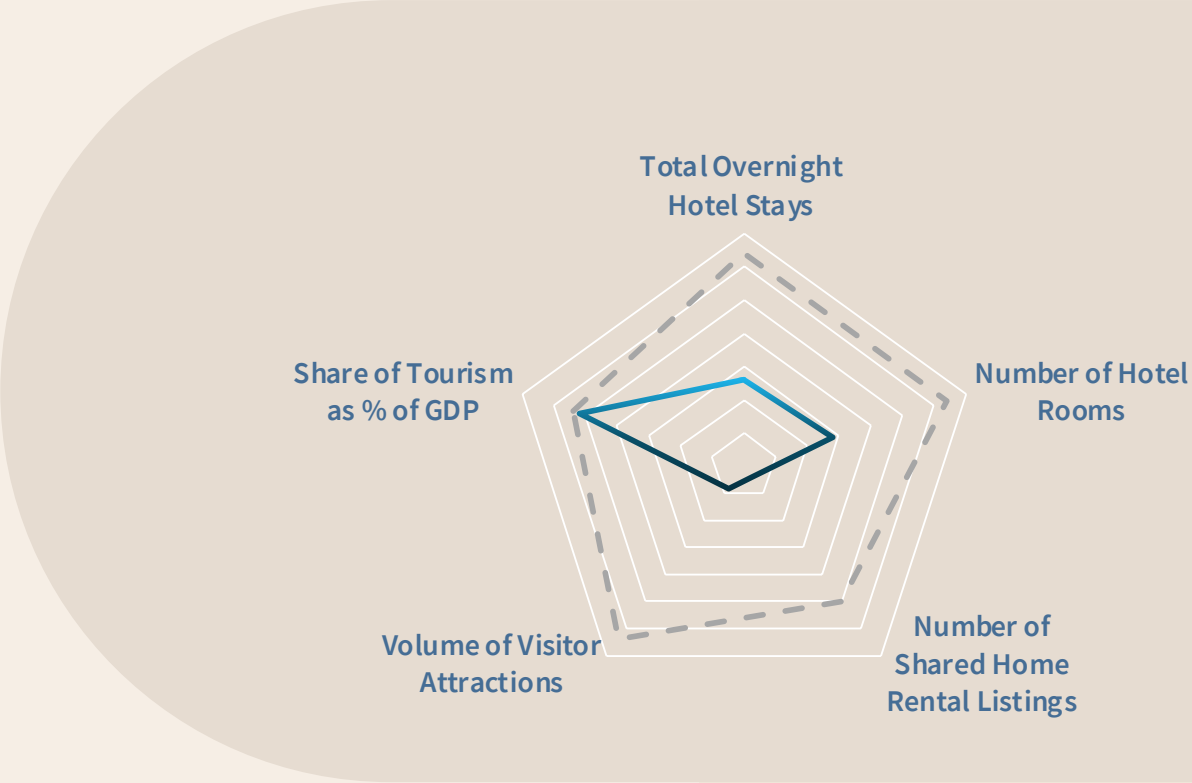
Total Overnight Stays: 1.83+ million (below the average of 3.87+ million)

Hotel Rooms: 7,745 (below the average of 15,260, with San Antonio, Fort Worth, Oklahoma City, and Tulsa ranking much higher than the rest of the comp set)

Shared Home Rental Listings: 715 (below the average of 2,865, with San Antonio and Fort Worth ranking much higher than the rest of the comp set)

Volume of Visitor Attractions: 207 (below than the average of 564)

Share of Tourism as % of GDP: 5% (same as comp set average)





Concentration

Compared to the comp set, Amarillo's concentration rate is in the upper half.

Home Rental Listing as % of Hotel Rooms: 9% (below the average of 18%)

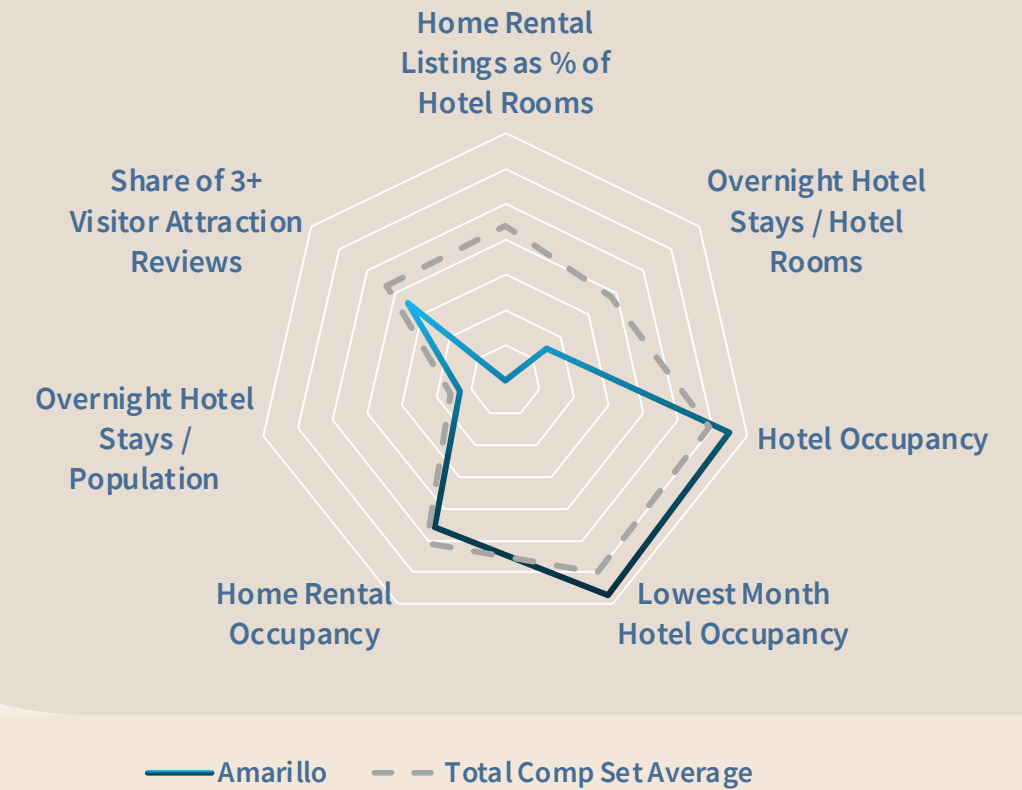
Overnight Hotel Stays per Hotel Room: 236 (below the average of 249)

Hotel Occupancy: 60% (above the average of 59%)

Lowest Month Hotel Occupancy: 61% (above than the average of 60%)

Home Rental Occupancy: 52% (below the average of 53%)

Overnight Hotel Stays / Population: 8.99 (below the average of 10.20)



Leisure

Compared the comp set, Amarillo's overall tourism scale is in the lower half.

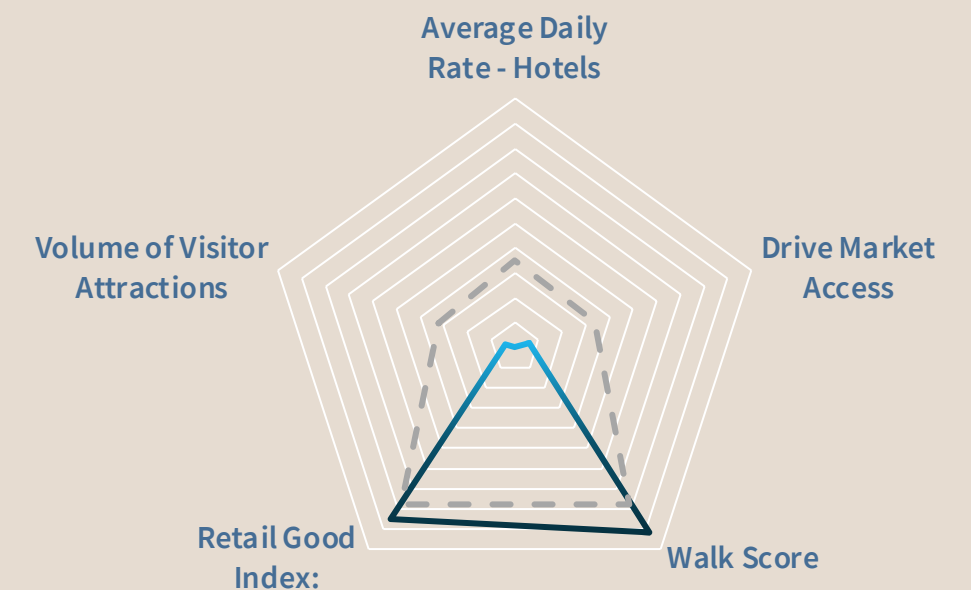
Average Daily Rate (ADR) - Hotels: \$94.11 (below the average of \$115.15)

Drive Market Access: 1.21 million people (below the average of 5.3 million, with San Antonio, Fort Worth, Oklahoma City, and Tulsa ranking much higher than the rest of the comp set)

Retail Goods Index: 80 (higher than average of 73.78)

Volume of Visitor Attractions: 207 (below the average of 564)

Walk Score: 40 (higher than the average of 34)



Business

Compared the comp set, Amarillo's overall tourism scale is in the lower half.

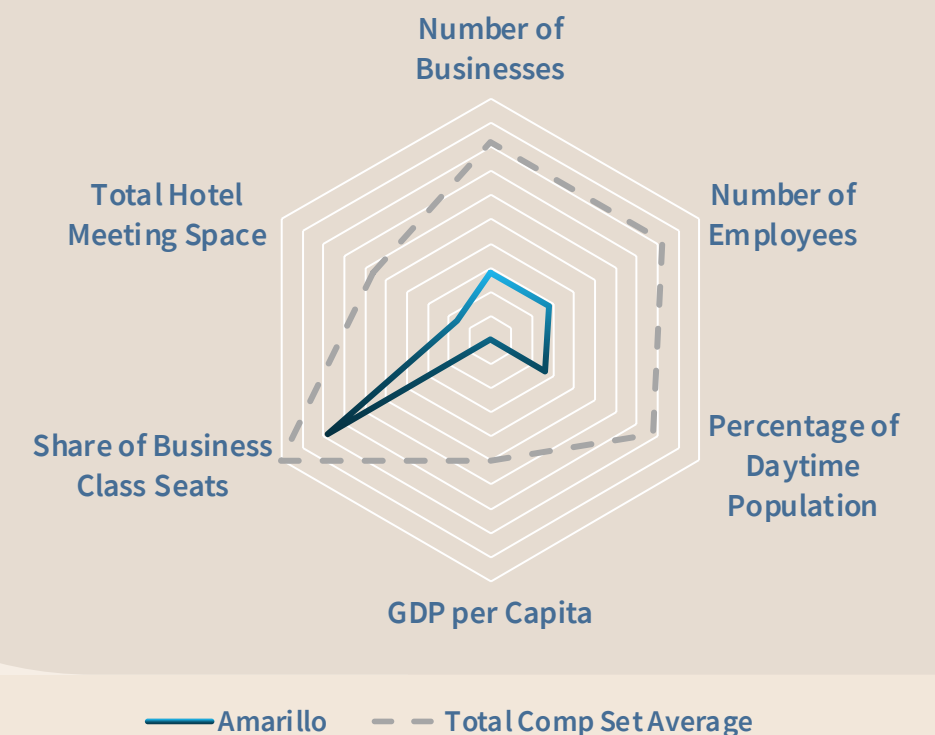
Share of Business Class Seats: 4% (below the average of 5%)

GDP per Capita: 54.87 (below the average of 130.24 with Fort Worth, Tulsa, and Cody being well above average)

Number of Employees: 105,350 (below the average of 289,074 with San Antonio, Fort Worth, and Oklahoma City being well above average)

Number of Businesses: 8,146 (below the average of 22,226 with El Paso, San Antonio, Fort Worth, Oklahoma City, and Tulsa well above average)

Employee/Residential Population Ratio: 102% (below the average of 109)



Urban Readiness

Compared the comp set, Amarillo's overall tourism scale is in the lower half.

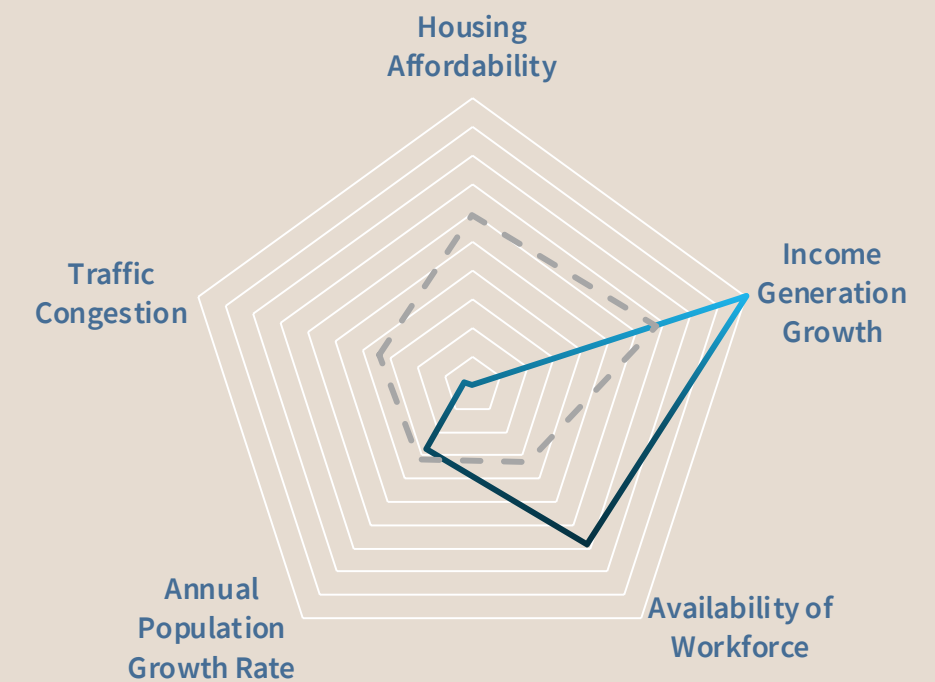
Housing Affordability: below average to the competitive set.

Income Generation Growth: 13% (above the average of 11%)

Availability of Workforce: 9.98 (above the average of 9.96)

Annual Population Growth Rate: .51% (below the average of .58%)

Traffic Congestion: 6 (below avg of 16.71)



Safety + Security

Compared the comp set, Amarillo's overall tourism scale is in the upper half.

Violent Crime: 584 (below the average of 605)

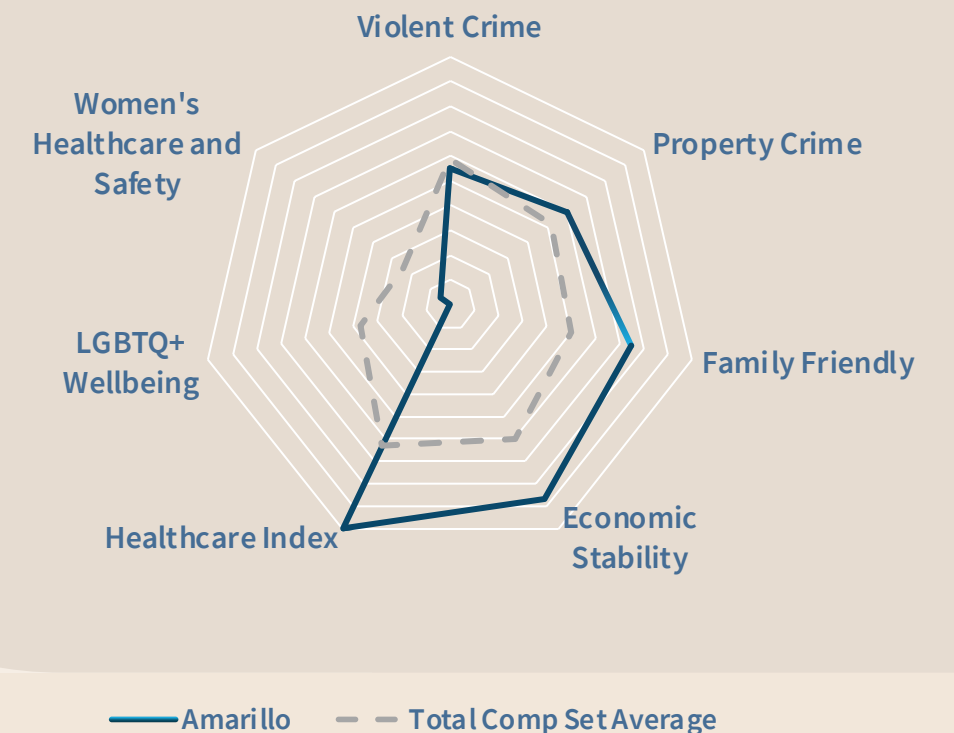
Property Crime: 742 (above the average of 711)

Family Friendly: 52 (above the average of 50)

Economic Stability: 104,740 (below the average of 338,205)

LGBTQ+ Wellness: 17 (below the average of 29 with Albuquerque well above the average at 49)

Healthcare Index: 83 (above the average of 78)



Environmental

Compared the comp set, Amarillo's overall tourism scale is in the lower half.

Risk Level of a Natural Disaster: 107 (below the average of 114)

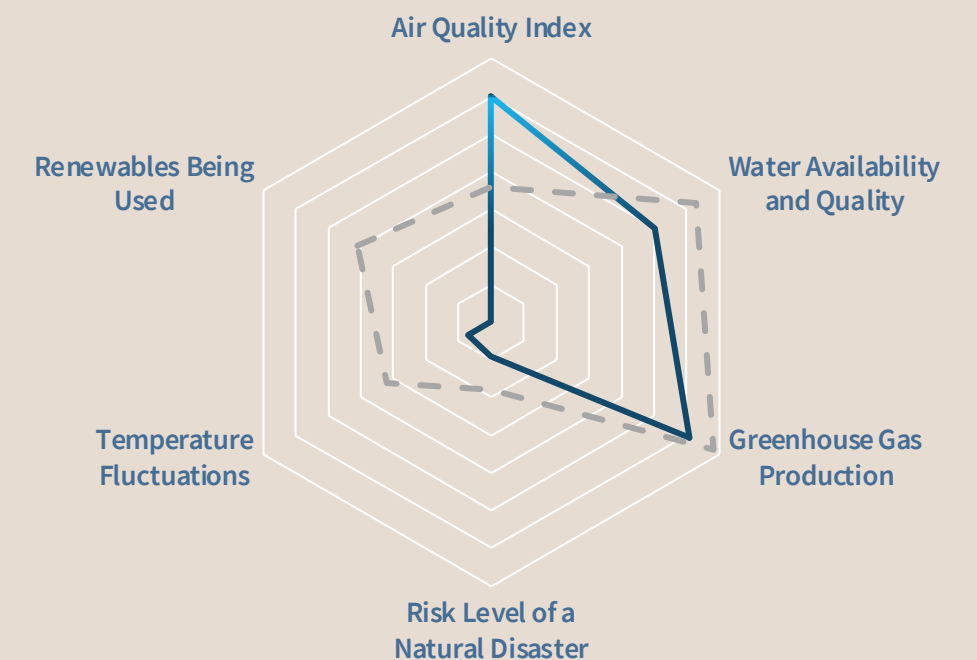
Temperature Fluctuation: 55 (below the average of 58)

Water Availability & Quality: 64 (below the average of 67)

Greenhouse Gas Production: 15.61 (below the average of 16.28)

Renewables Being Used: 11 (below average of 20 with Lubbock, El Paso, San Antonio, and Fort Worth also scoring at 11)

Air Quality Index: 13.90 (above average of 12.83)





EVENT MATRIX



UNLOCKING THE POTENTIAL OF EVENTS

Leisure events play a vital role in driving overnight visitors and attracting investment to destinations. JLL’s innovative Event matrix product is designed to empower event planners, civic leaders, and local and regional stakeholders with the insights needed to make proactive strategic decisions to invest and capitalize on leisure events.

By creating a uniform objective approach to evaluating current leisure events, this product enables the creation of a focused event strategy that yields measurable results and drives greater overnight visitation to the destination.

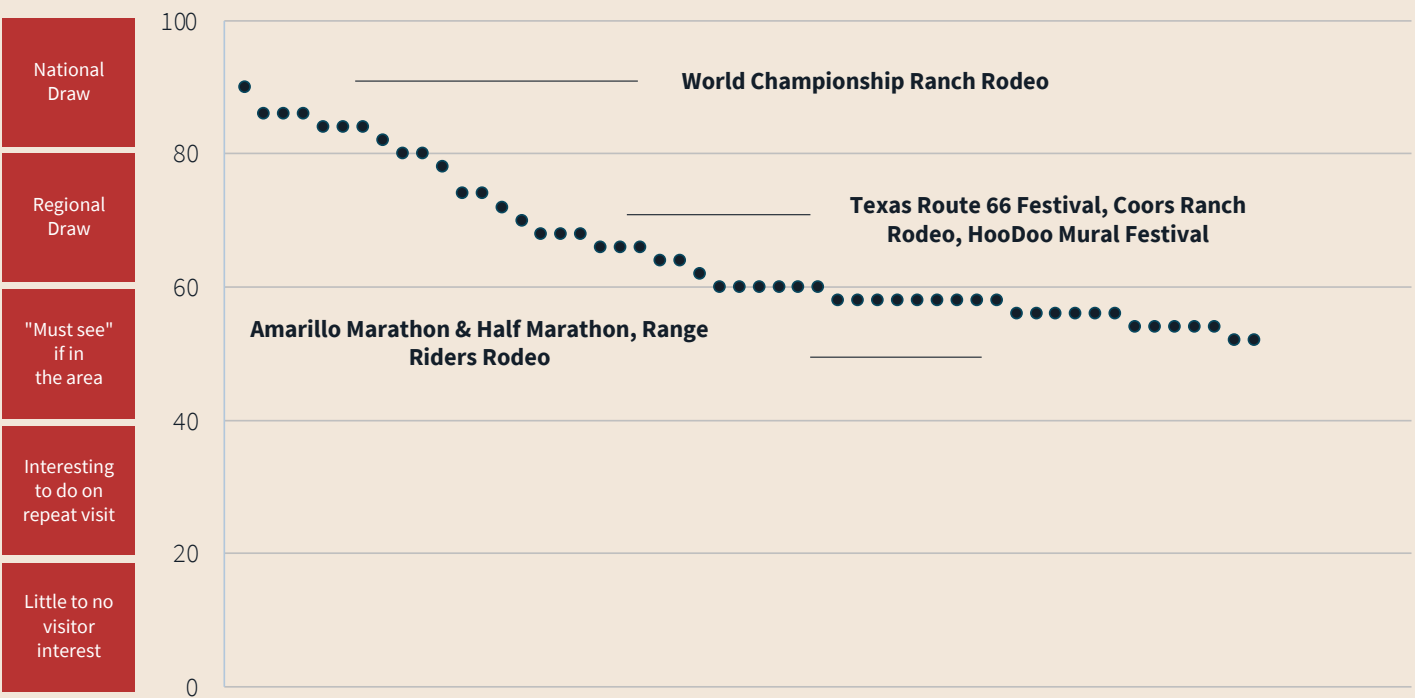
- Conduct inventory of all leisure events
- Conduct individual event analysis based on standard criteria
- Chart outcomes to determine current positioning
- Determine gaps and growth opportunities for the destination
- Utilize outcomes to drive strategy for the next 3-5 years



EVENT SCORING CRITERIA

JLL Event Matrix	Example		
	Weight	Weight	Example
PROGRAM COMPONENTS			MAX PTS
1. Tourism Promotion - Destination Impact	10%	10	5
2. Benefit to the Destination Brand	6%	6	5
3. Innovation - uniqueness	2%	2	5
4. Evidence of Partnerships	4%	4	5
5. Organizational Structure & Management Capability	4%	4	5
6. Economic Impact (Direct Spending)	8%	8	5
7. Suitable Target Market (s)	4%	4	5
8. Comprehensive Marketing Plan/Approach	8%	8	5
9. Overnight Stays (Room nights)	10%	10	5
10. Scale of Project - future potential	4%	4	5
Bonus. Time of Year - Need Periods	10%	10	5

19% of events scored are rated as “National Draws”



52
Events
evaluated
and scored

10
Events rated as
“National Draws”
(19% events)

20
Events rated as “Regional
Draws” and ““Must see” if in
the area”

EVENT SCORING CRITERIA

ITEM	DEFINITION
Tourism promotion – destination impact	Will the event impact the destination's overall attractiveness?
Benefit to the destination brand	Alignment of the event with the overall branding strategy for the destination
Innovation - uniqueness	Has this event been repeated in many destinations, or does it have a unique feature/experience that drives a larger audience?
Evidence of partnerships	Who are the partners that are involved in this event?
Organizational structure & Management capability	Internal structure of the event management team and their related experience
Economic impact (direct spending)	Direct spending, driving revenue to local businesses, broader impact on the local community
Suitable target market (s)	Research and data gathering process for specific target audiences
Comprehensive marketing plan/approach	Target audiences, tactics to reach the targets, resources to create awareness
Overnight stays (room nights)	Is overnight visitation impacted by this event?
Scale of project – future potential	Is the event scalable with potential to grow?
Time of year – need periods	Is the event planned in a period that traditionally has lower demand and therefore would benefit from a new “demand generator”?
Total	

EVENT LEVEL	LARGELY LOCAL EVENT	FAIRLY CONNECTED EVENT
Visitor Level of Interest	Little to no interest	Interesting to do on repeat visit
Rating	0-19	20-39

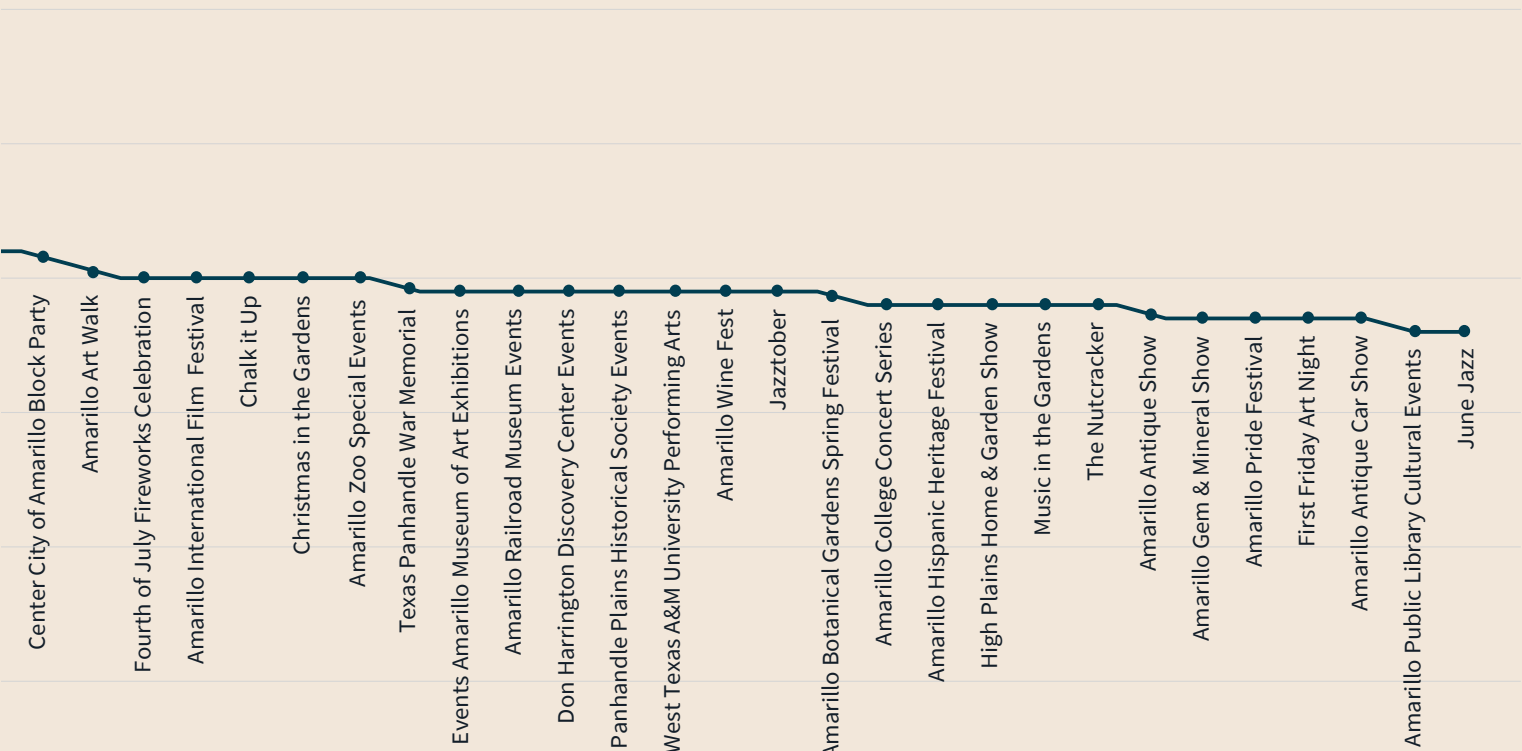
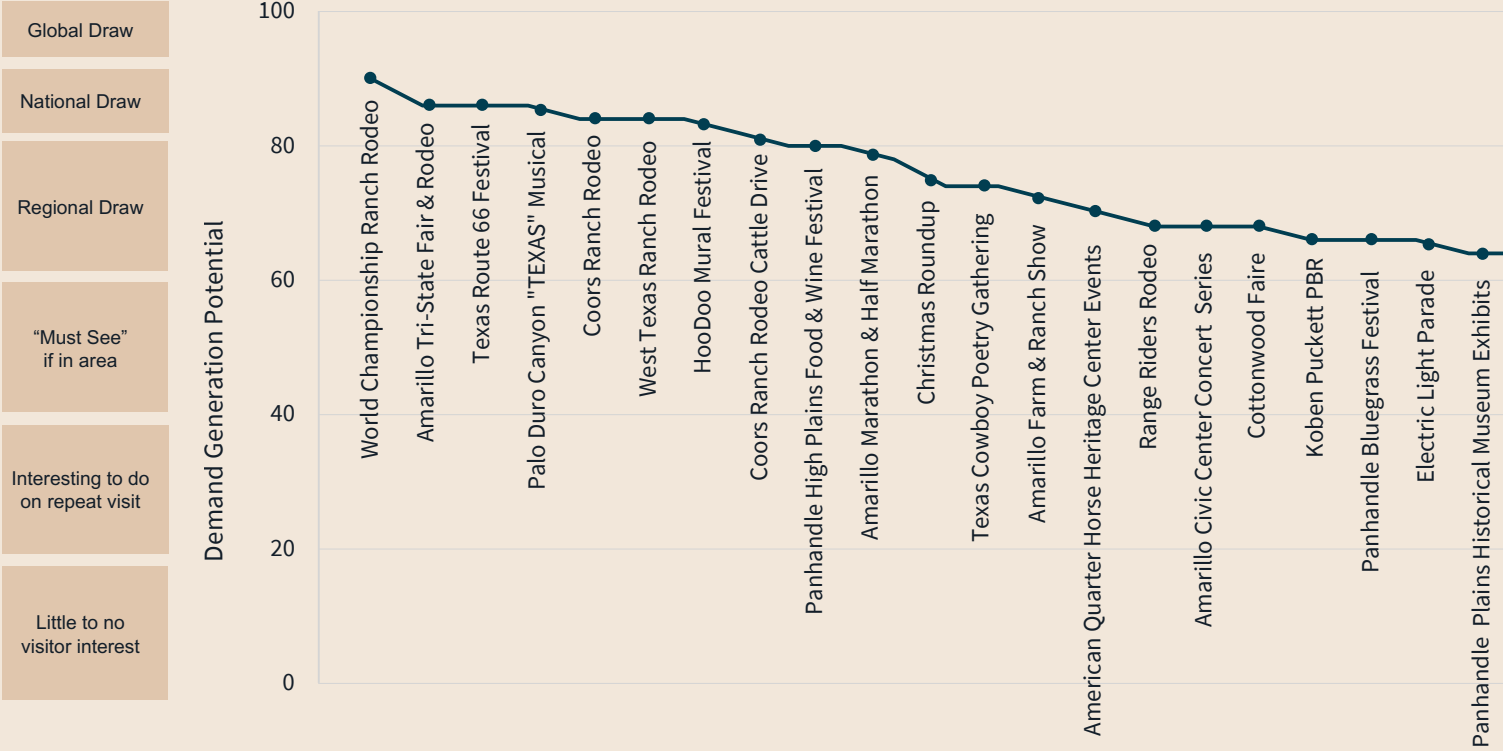
MAX SCORE	WORLD CHAMPIONSHIP RANCH RODEO	TEXAS ROUTE 66 FESTIVAL	AMARILLO MARATHON & HALF MARATHON
5	5	4	3
5	5	5	3
5	5	4	2
5	4	4	4
5	4	3	4
5	4	4	3
5	4	5	4
5	4	3	4
5	4	4	3
5	4	4	3
5	2	3	4
50 (100%)	90%	86%	74%

MOST CONNECTED EVENT	LARGELY LOCAL EVENT	FAIRLY CONNECTED EVENT	MOST COMPELLING DEMAND GENERATOR
“Must see” if in the area	Targeted regional draw	National draw	Worldwide draw
			
40-59	60-79	80-95	95-100

EVENT MATRIX

Individual events are inventoried based on the feedback from the engagement process, event organizers, and desktop research.

The outcome below indicates that critical mass of events exists in destination, ranging from national to regional assets.

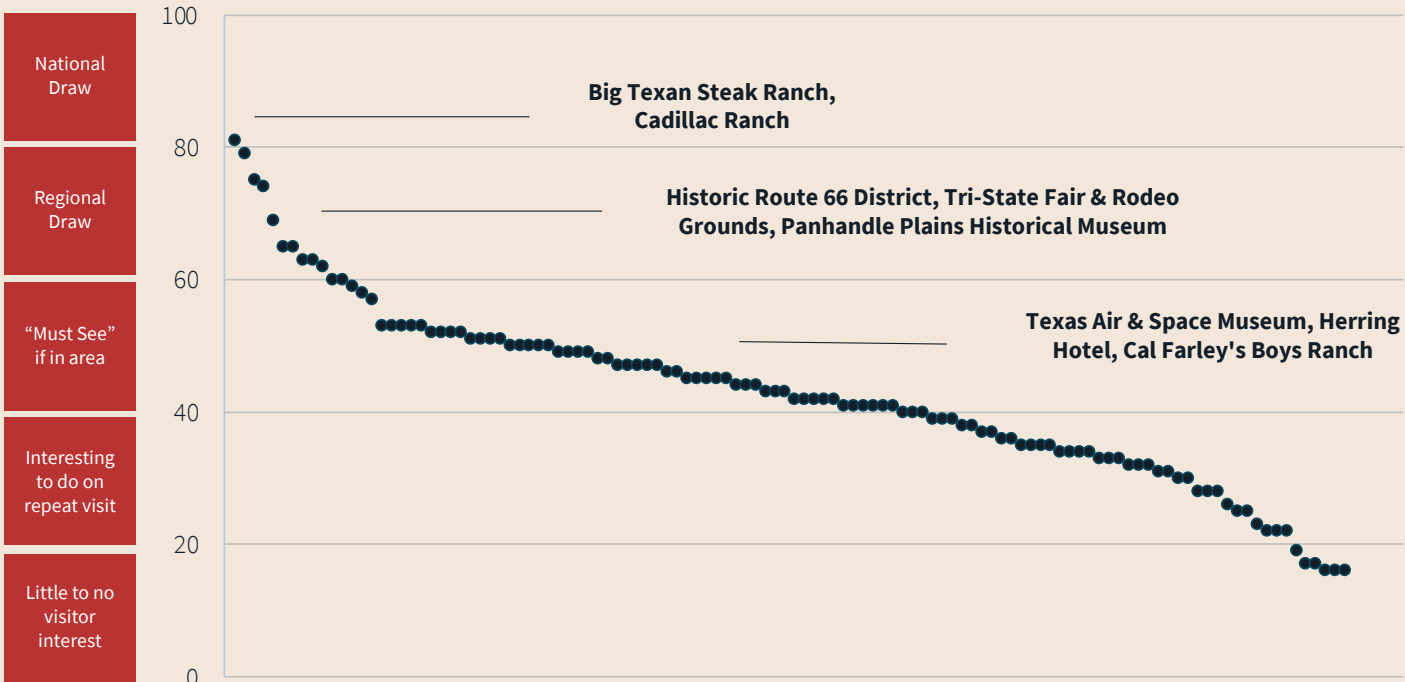


*Historical Data Included

DEMAND DRIVER SCORECARD

Outcome Summary

10% of assets scored (12) are generating regional or national demand



113

Attractions evaluated and scored

12

Attractions rated as regional or national demand drivers (10% assets)

59

Attractions and experiences rated as "Must See" if in the area

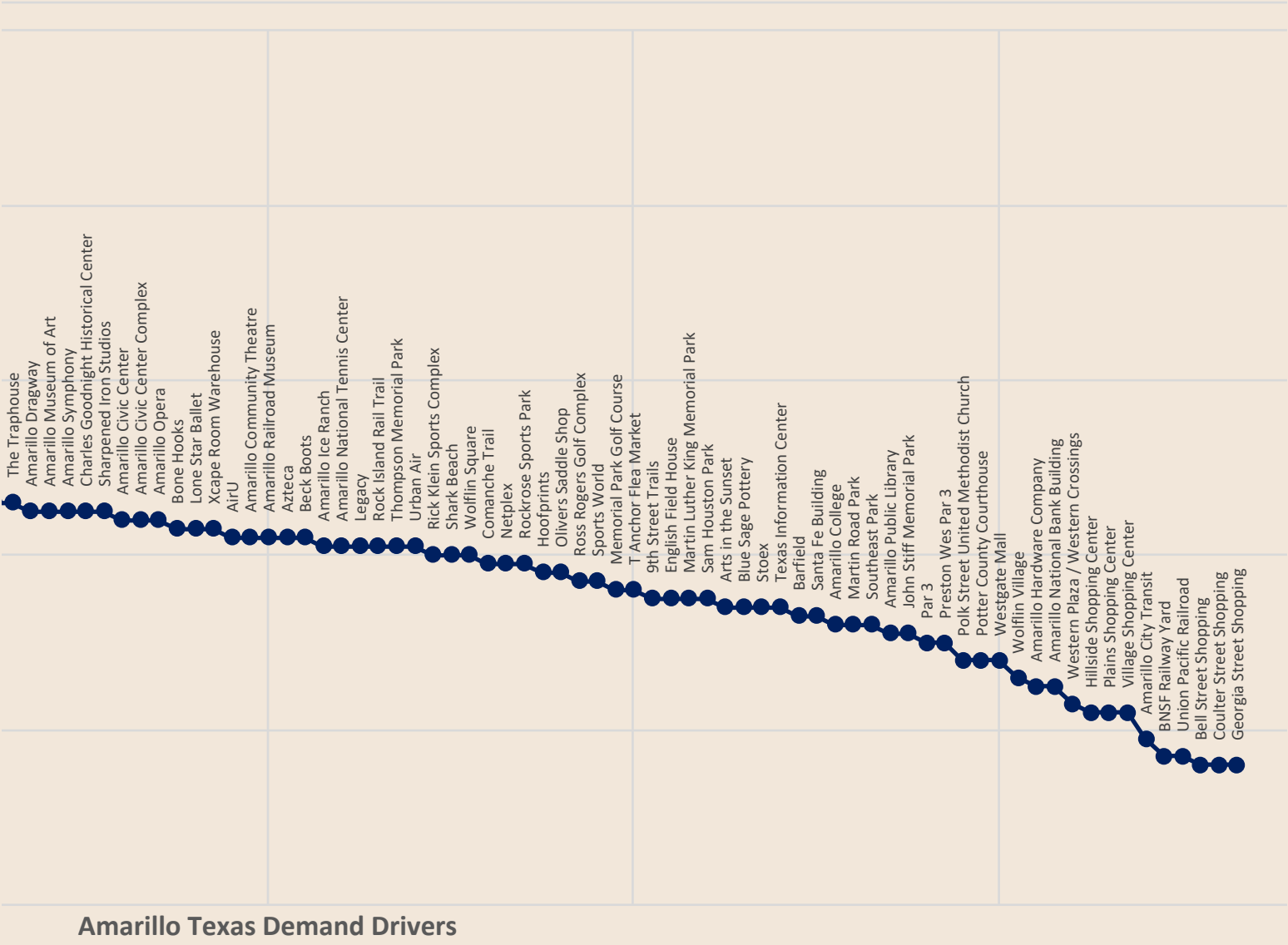
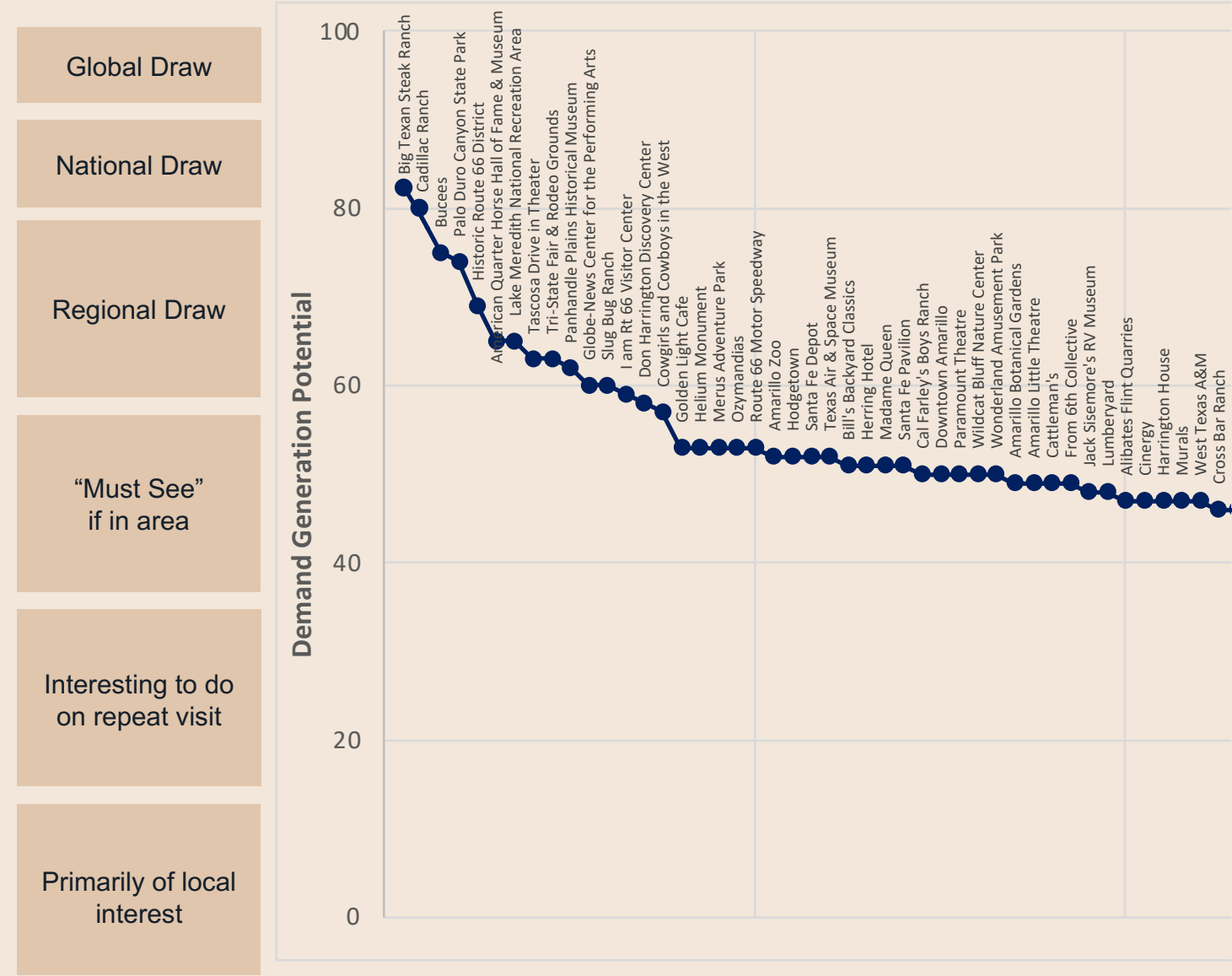
Demand Driver Scorecard Criteria

ITEM	DEFINITION	MAX VALUE
One of a Kind	Captivating content or collection that drive interest and appeal (Proximity of alternative similar offerings can be a favor in overall uniqueness)	25
Iconic Scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy - trying to capture a moment)	20
Engaging Visitor Experience	Interaction between the guest and the attraction	15
Current Visitor Demand	Current Level of visitor traffic, reviews, etc.	15
Event Opportunities (for an asset like Golden Gate Bridge we are including the surrounding parkland)	Programming temporal, catalytic events	10
Venue Capabilities	Easy transformation and adaptation to host various functions	5
Identified Target Audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future Unique Development (extremely significant, very significant, neutral, not significant, completely insignificant)	Upcoming additions or plans that elevate potential	5

DEMAND DRIVER SCORECARD

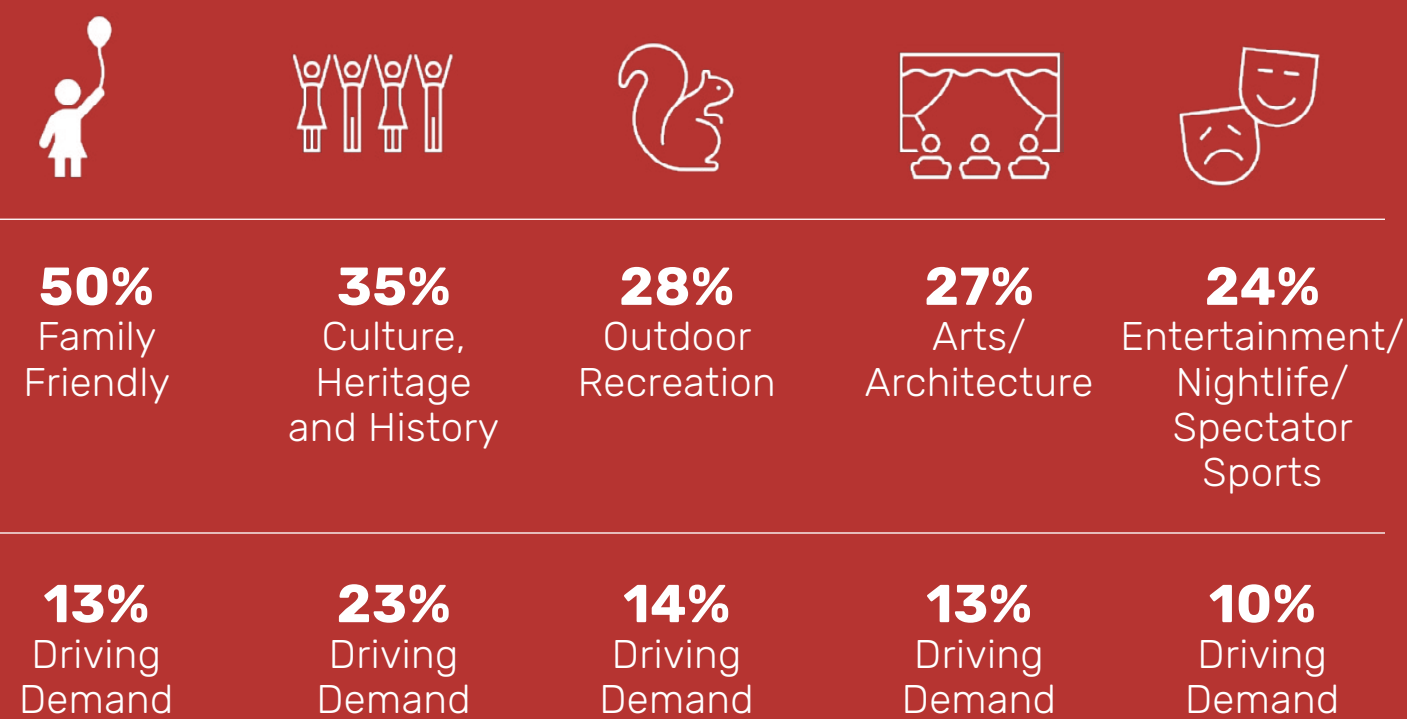
113 assets and experiences were studied based on the feedback from the engagement process, as well as desktop research and social listening platforms such as TripAdvisor.

10% of assets studied (12/113) are driving national and regional demand to Amarillo TX



SCORE CARD SUMMARY

From our analysis, we identified the categories with the greatest number of attractions positioned to generate demand:



Example asset

- Big Texan Steak Ranch, Cadillac Ranch, Palo Duro Canyon State Park
- Historic Route 66 District, American Quarter Horse Hall of Fame & Museum,
- Palo Duro Canyon State Park, Merus Adventure Park, Wildcat Bluff Nature Center
- Globe-News Center for the Performing Arts, Murals
- Tascosa Drive in Theater, Route 66 Motor Speedway





SWOT ANALYSIS



STRENGTHS ✨

AUTHENTIC WESTERN IDENTITY

- Widely perceived as “**The Real Texas**” with deep cowboy, ranching, and agricultural heritage.
- Strong rodeo culture (WRCA, Tri-State Fair & Rodeo) with opportunity to be the **Ranch Rodeo Capital of Texas**.
- Unique cultural traits: resilience, grit, friendliness, wide-open landscapes.

OUTDOOR & NATURAL ASSETS

- **Palo Duro Canyon**, one of America’s most dramatic canyon environments, is a significant—yet underleveraged—tourism anchor.
- Expanding outdoor recreation (Cross Bar Ranch, trail development, potential public lands access).

GEOGRAPHIC ADVANTAGE

- Sits on major national travel corridors (**I-40, US-287, US-27**), capturing large volumes of road-trip travelers.
- Strong awareness among domestic pass-through travelers and international Route 66 visitors.

CULTURAL AND ARTISTIC MOMENTUM

- Emerging arts & culture scene (HooDoo Mural Festival, Arts in the Sunset).
- Local dining scene is strong post-COVID; hospitality reputation is consistently positive.

GROWING REGIONAL VISIBILITY

- Increased national attention; Visit Amarillo is proactive and a bright spot in marketing and community engagement.
- Strong local pride in sports (especially football) and western lifestyle traditions.



WEAKNESSES ✨

PERCEPTION AS A “PASS-THROUGH CITY”

- Many travelers view Amarillo as a **one-night stop**, not a destination.
- Limited multi-day experiences or clear “hooks” to extend stay.

AGING TOURISM INFRASTRUCTURE

- **Civic Center** widely seen as outdated, undersized, and no longer competitive for meetings, concerts, or major events.
- Limited luxury or higher-end lodging options.
- Corridor conditions (Route 66/San Jacinto) are viewed as **unsafe or unattractive** by both locals and visitors.

FRAGMENTED VISITOR EXPERIENCE

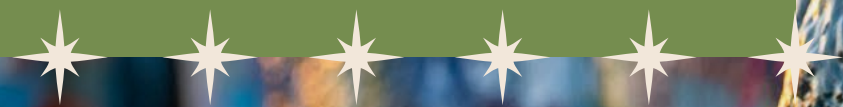
- Lack of a **unified entertainment district** or dense cluster of attractions.
- Fairgrounds, downtown, I-40 corridor and Route 66 operate independently rather than as a cohesive visitor zone.

COMMUNITY PERCEPTION CHALLENGES

- Significant local skepticism around tourism investment and use of visitor taxes.
- Residents often do not understand the **economic benefits** of tourism.
- Conservative, independent ethos can hinder collaborative planning.

WORKFORCE LIMITATIONS

- Hospitality workforce shortages and limited training pipelines.
- Challenges recruiting/retaining service workers.





OPPORTUNITIES ✨

EVENT & FESTIVAL GROWTH

- Strong demand for expanded rodeo, livestock, equestrian, and ranching events.
- Concerts, cultural festivals, and large community events represent major untapped potential.
- Potential to elevate signature events and create a **multi-day annual anchor festival**.

DISTRICT-LEVEL REDEVELOPMENT

- Reimagining the **Civic Center District** into an entertainment zone (similar to Waco Silos, Bricktown OKC).
- Upgrading the **Fairgrounds** as a modern event campus.
- Revitalizing **Route 66** as a safe, vibrant heritage corridor with curated experiences.

EXPANSION OF OUTDOOR & AGRITOURISM

- Leverage Palo Duro Canyon, emerging trail systems, ranchland experiences.
- Develop **agri-tourism**, farm-to-table, ranch visits, heritage education, and nature-based experiences.

STRENGTHENING THE WESTERN BRAND

- Opportunity to position Amarillo as the **national epicenter of authentic cowboy culture**.
- Continued integration of storytelling, ranching heritage, cowboy lifestyle, and cultural stewardship.

IMPROVING RESIDENT ENGAGEMENT AND UNDERSTANDING

- “Amarillo 101” tourism education, community dialogue, and pride-building.
- More aligned messaging around economic benefits and quality of life.

LEVERAGING GROWING MEDIA ATTENTION

- Large-scale content collaboration opportunities (film, documentaries, influencer travel, Route 66 revival).

THREATS ✨

CONTINUED INFRASTRUCTURE DECLINE

- Failure to modernize the Civic Center or key visitor corridors risks long-term competitiveness.
- Other Texas markets (Lubbock, Abilene, Waco, Fort Worth, Oklahoma City) continue to upgrade facilities.

ECONOMIC AND POLITICAL RESISTANCE

- Local resistance to tourism-related tax increases complicates major investments.
- Political division may slow decision-making or stall large-scale projects.

ENVIRONMENTAL & CLIMATE FACTORS

- Dust, drought, and weather extremes could negatively affect visitor perception and outdoor experiences.
- Palo Duro Canyon and regional landscapes face long-term environmental pressures.

COMPETITIVE REGIONAL DESTINATIONS

- Neighboring cities developing stronger event venues, universities, and entertainment anchors.
- Larger markets have more established branding and investment momentum.

LABOR MARKET LIMITATIONS

- Limited workforce pipeline and high competition for service workers challenge service quality and business growth.

ROUTE 66 DECLINE

- Blight, crime, and underinvestment threaten one of Amarillo's strongest international demand generators.

SUMMARY ✨ STATEMENT

Amarillo has a rare opportunity to elevate its visitor economy by leaning into its authentic Western identity, expanding outdoor and agritourism, building a stronger events ecosystem, and strategically reinvesting in its key cultural districts. With infrastructure upgrades, brand alignment, and stronger community engagement, Amarillo can evolve from a pass-through stop into a **multi-day Western cultural destination** with statewide and national visibility.



COMMUNITY ENGAGEMENT

1

ROLE OF ORGANIZATIONS/ INDUSTRIES IN SHAPING THE FUTURE OF TOURISM IN AMARILLO

ECONOMIC DEVELOPMENT & BUSINESS/ INDUSTRY ROLE

- Many stakeholders see themselves as **economic development partners**, with tourism positioned as a major economic driver and representation of Amarillo's ethos.
- Several believe the **private sector should take the lead**, with the city playing a facilitator role (e.g., Nebraska City model).
- AEDC, Chamber, and Visit Amarillo roles seen as crucial in **business attraction, messaging, and community engagement**.
- Strong sense that **hospitality, agriculture, ranching, and rodeo industries** anchor Amarillo's identity and should shape the tourism narrative.



EVENT, FAIRGROUNDS & RODEO LEADERSHIP

- Tri-State Fair & Rodeo leadership sees themselves as a **primary tourism driver** and community hub (85+ annual event, 104-acre complex).
- Industry sees huge opportunity to **grow rodeo and equestrian event presence**, positioning Amarillo as the "**Ranch Rodeo Capital**."
- Fairgrounds stakeholders feel they are **more relevant than the Civic Center** and should be further developed.

CITY GOVERNMENT & PUBLIC AGENCIES

- City sees its role in **infrastructure**, safety, streetscape improvements, and supporting redevelopment (PIDs, grants, land incentives).
- Emergency management leaders see their role as ensuring **residents and visitors' safety**, protecting the "sunny side" of the city.

EDUCATION AND WORKFORCE

- Educational institutions and civic sectors see huge opportunity in **hospitality workforce development**, expanding hospitality training, and teaching locals about tourism's value ("Amarillo 101").

CIVIC CENTER & VENUE OPERATORS

- Stakeholders believe the Civic Center should play a central role but is **currently constrained by outdated facilities and past failed bond votes**.
- Many emphasize need for **vision, modernization, and clarity of purpose** (event center vs. convention center).

2

CURRENT STATE OF TOURISM IN AMARILLO: WHAT'S GOING WELL & WHERE ARE THE OPPORTUNITIES?

WHAT'S GOING WELL

- **Visit Amarillo leadership (especially Kashion Smith)** repeatedly cited as a bright spot: proactive, strategic, positive messaging, increasing awareness.
- Amarillo is **more recognized** nationally; people “see Amarillo more on the map.”
- Restaurants thriving post-COVID; strong **local dining culture**.
- Strong **sports (football)** and **rodeo culture**.
- **Hospitality and friendliness** consistently highlighted.
- International tourism driven heavily by **Route 66**, which represents ~28% of business.
- New projects: AI center, Cross Bar Ranch outdoor rec development, mural initiatives.



CHALLENGES & CONSTRAINTS

- Amarillo is still seen by many as a **pass-through community** (“bathroom break between ABQ & OKC”).
- Local resistance to tourism development (fear of taxation, civic skepticism).
- **Civic Center viewed as outdated and inadequate** for major conventions or concerts.
- **Route 66 corridor condition:** crime, blight, underinvestment in San Jacinto neighborhoods.
- Workforce shortage in hospitality and service industries.
- Limited higher-end or **luxury tourism offerings**.
- Perception gap: locals often **do not understand tourism’s financial impact**.

MAJOR OPPORTUNITIES

- **Events & Festivals:** huge potential to grow rodeo circuits, concerts, seasonal festivals, heritage events.
- **Reimagining the Convention Center District** into an entertainment zone (Waco Silos, Bricktown OKC models).
- **Fairgrounds redevelopment**, including added arenas, meeting rooms, improved entryways.
- **Authentic Western/Cowboy brand amplification**—leaning into real Texas heritage.
- **Outdoor recreation** expansion: Palo Duro Canyon, ranchlands, trail systems.
- **Agri-tourism** as a major untapped niche.
- **Improved collaboration and communication** across organizations and with residents.
- **Centralized events calendar** to unify programming.



3

AMARILLO'S IDENTITY: CORE THEMES & VISITOR EXPERIENCES

WESTERN HERITAGE & COWBOY CULTURE

- Overwhelming agreement: Amarillo is **"the real Texas."**
- Themes: cowboy grit, ranching, cattle culture, loyalty, resilience, big skies, wind, dust, boots.
- Rodeos are the clearest reflection of Amarillo's identity (WRCA, Working Ranch Rodeo).
- The cowboy way of life—connection to land, family, and community—is seen as Amarillo's strongest brand.

AGRICULTURE & LAND

- Cattle, feedlots, farming, and wide-open spaces form an authentic story visitors seek.
- Palo Duro Canyon seen as the **true natural identity anchor.**
- Agri-tourism considered a huge opportunity to interpret land, ranching, food heritage.



ROUTE 66 IDENTITY

- Mixed feelings:
- **Locals** view it as irrelevant or overplayed.
- **Visitors** see it as iconic and authentic.
- Potential exists to elevate Route 66 beyond Cadillac Ranch and turn it into a hub of western/cultural storytelling.

ART, CULTURE & CREATIVITY

- Emerging mural scene (HooDoo Festival), Arts in the Sunset, community arts organizations.
- Opportunity to connect cowboy culture with modern creativity (e.g., using Cadillac Ranch as a cultural icon, not just a roadside stop).

SMALL-TOWN CHARM & HOSPITALITY

- Strong sense of friendliness, respect, neighborliness—"small town in a big land."
- Visitors value the authenticity and simplicity of the local culture.

AMARILLO AS A HUB

- A natural geographic hub for the Texas Panhandle—crossroads culture (I-40, Route 27).
- Known as a reliable rest stop—but goal is to evolve into more than a two-night stay destination.

STRATEGIC PROCESS AMARILLO

JLL is proud to partner with Visit Amarillo, the Civic Leaders, and a broad coalition of public, private, and community stakeholders in developing a Destination Master Plan that reflects the aspirations of the community while positioning Amarillo for long-term success. Together, our objective is to create a planning process that extends beyond traditional tourism strategy—one that is visionary, actionable, data-driven, and grounded in the unique character, assets, and opportunities of Amarillo and the Texas Panhandle. This approach ensures that the

final plan not only addresses current priorities but also establishes a clear roadmap for future destination development, investment, and stewardship.

Our collaborative methodology combines the global expertise of JLL's Global Tourism & Destination Advisory team with the local knowledge and leadership of Visit Amarillo, civic partners, business leaders, and residents. Through extensive stakeholder engagement, market analysis, destination benchmarking, and strategic visioning, we

seek to build consensus around a shared vision for Amarillo's future. This inclusive process enables us to align tourism development, quality-of-place investments, economic growth initiatives, and community priorities into a cohesive framework that benefits both visitors and residents.

The resulting Destination Master Plan will serve as a catalyst for transformational growth, identifying opportunities to strengthen Amarillo's visitor economy, enhance destination infrastructure, elevate

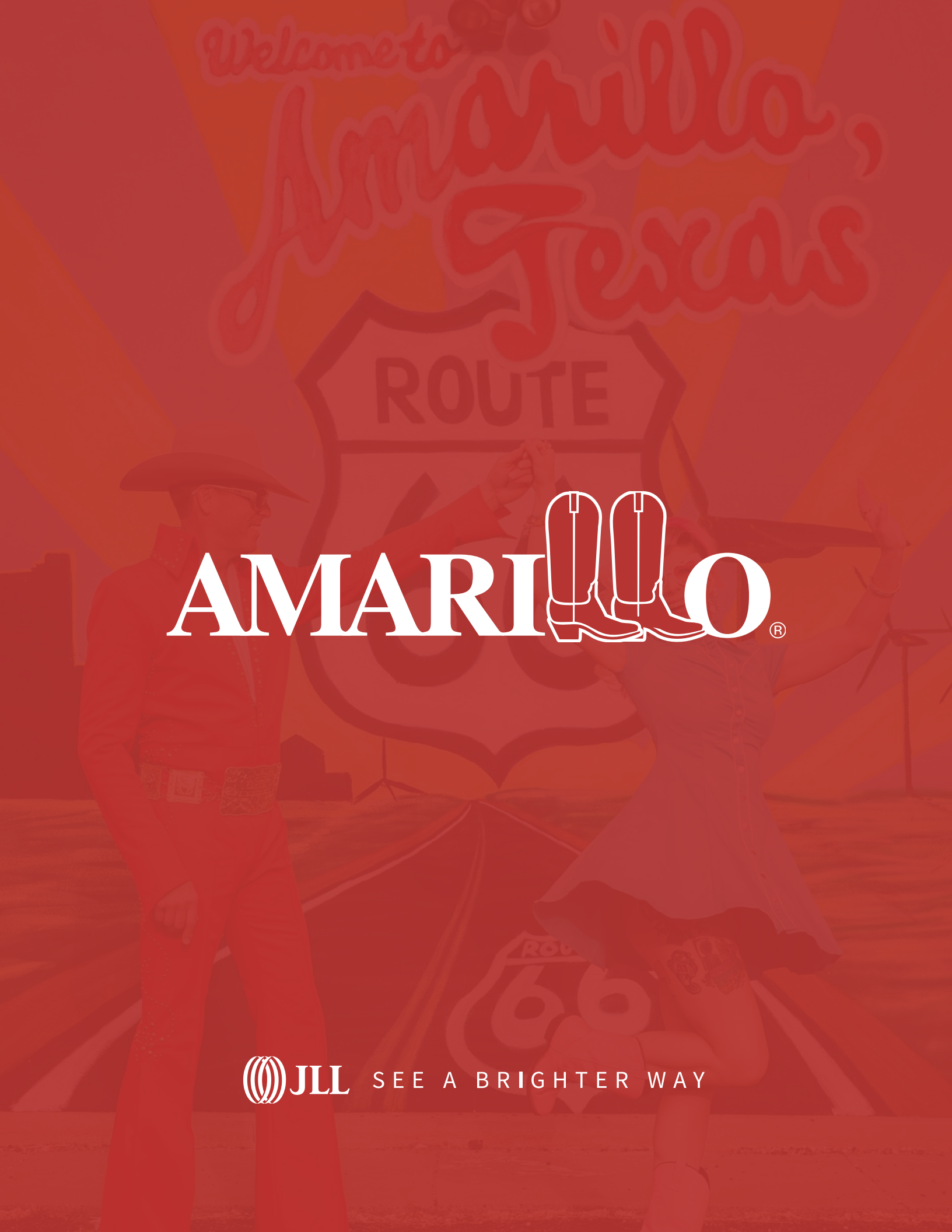
the downtown and cultural experience, expand outdoor recreation and event offerings, and leverage signature assets such as Route 66, Palo Duro Canyon, the city's western heritage, and emerging entertainment districts. Ultimately, our goal is to establish a bold and implementable vision that advances economic vitality, strengthens community pride, and positions Amarillo as one of the premier destination experiences in the American West for generations to come.



VISION STATEMENT

By 2036, Amarillo will be nationally recognized as the epicenter of authentic Western culture and industry innovation – anchored by a revitalized Civic Center District, a robust year-round event calendar, and a community that understands and supports destination tourism as a driver of economic vitality and quality of life.





AMARILLO®

 **JLL** SEE A BRIGHTER WAY