

Memorandum



DATE January 17, 2014

TO Members of the Budget, Finance & Audit Committee: Jerry R. Allen (Chair),
Jennifer S. Gates (Vice Chair), Tennell Atkins, Sheffie Kadane, Philip T. Kingston

SUBJECT **Dallas Convention and Visitors Bureau Update**

On Tuesday, January 21, 2014 you will be briefed on the Dallas Convention and Visitors Bureau Update. The briefing materials are attached for your review.

Please contact me with any questions.



Forest E. Turner
Assistant City Manager

[Attachment]

c: Honorable Mayor and Members of the City Council
A.C. Gonzalez, Interim City Manager
Rosa A. Rios, City Secretary
Warren M.S. Ernst, City Attorney
Daniel F. Solis, Administrative Judge
Craig D. Kinton, City Auditor
Ryan S. Evans, Interim First Assistant City Manager

Jill A. Jordan, P.E., Assistant City Manager
Forest E. Turner, Assistant City Manager
Joey Zapata, Assistant City Manager
Charles M. Cato, Interim Assistant City Manager
Theresa O'Donnell, Interim Assistant City Manager
Frank Libro, Public Information Officer
Elsa Cantu, Assistant to the City Manager



Convention & Visitors Bureau

Budget, Finance & Audit Committee Briefing

January 21, 2014

B I G T H I N G S H A P P E N H E R E

PHILLIP J. JONES
President/CEO Dallas CVB

DAVE BROWN
American Airlines Center
Dallas CVB Chairman 2013-2014

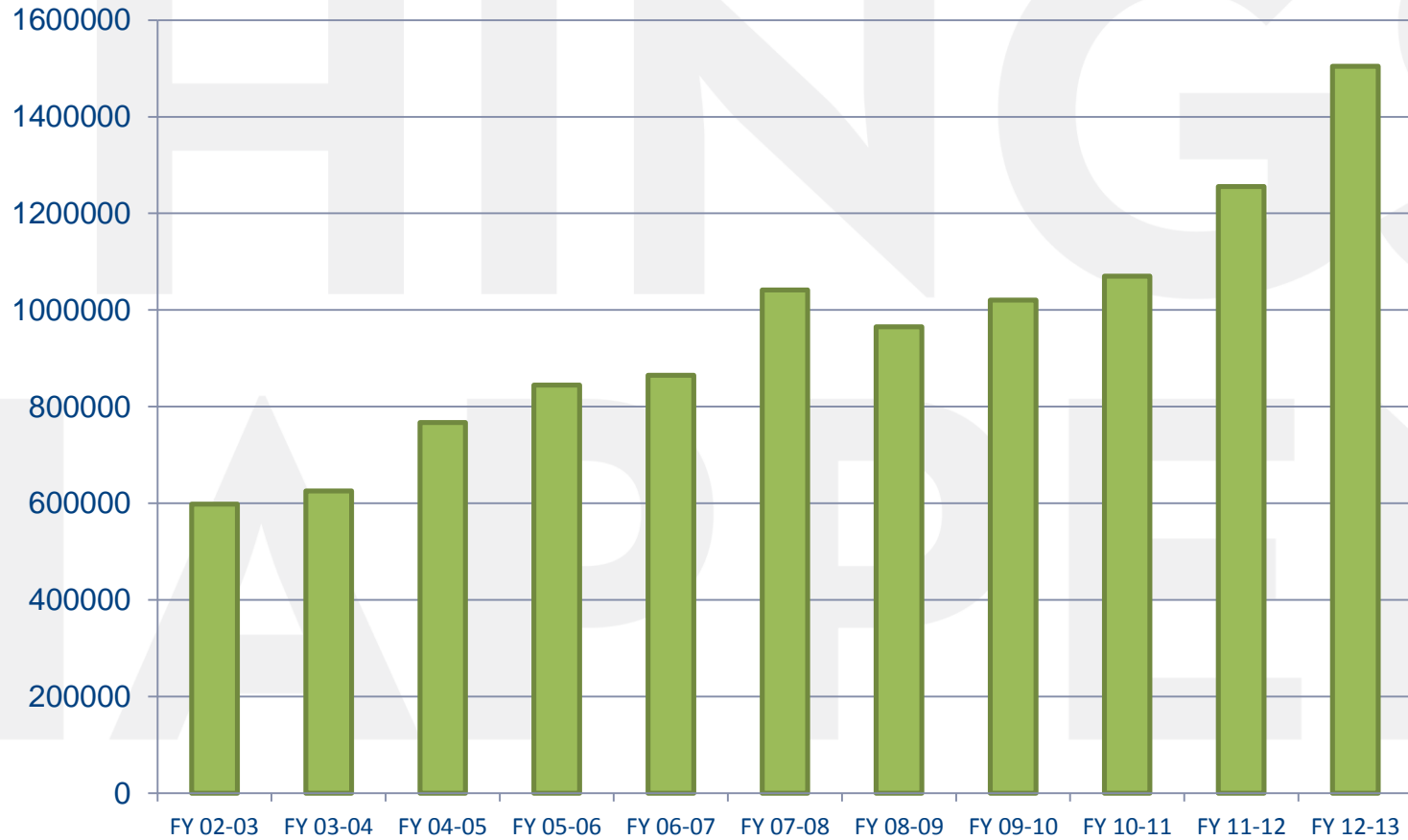


Year-in-Review



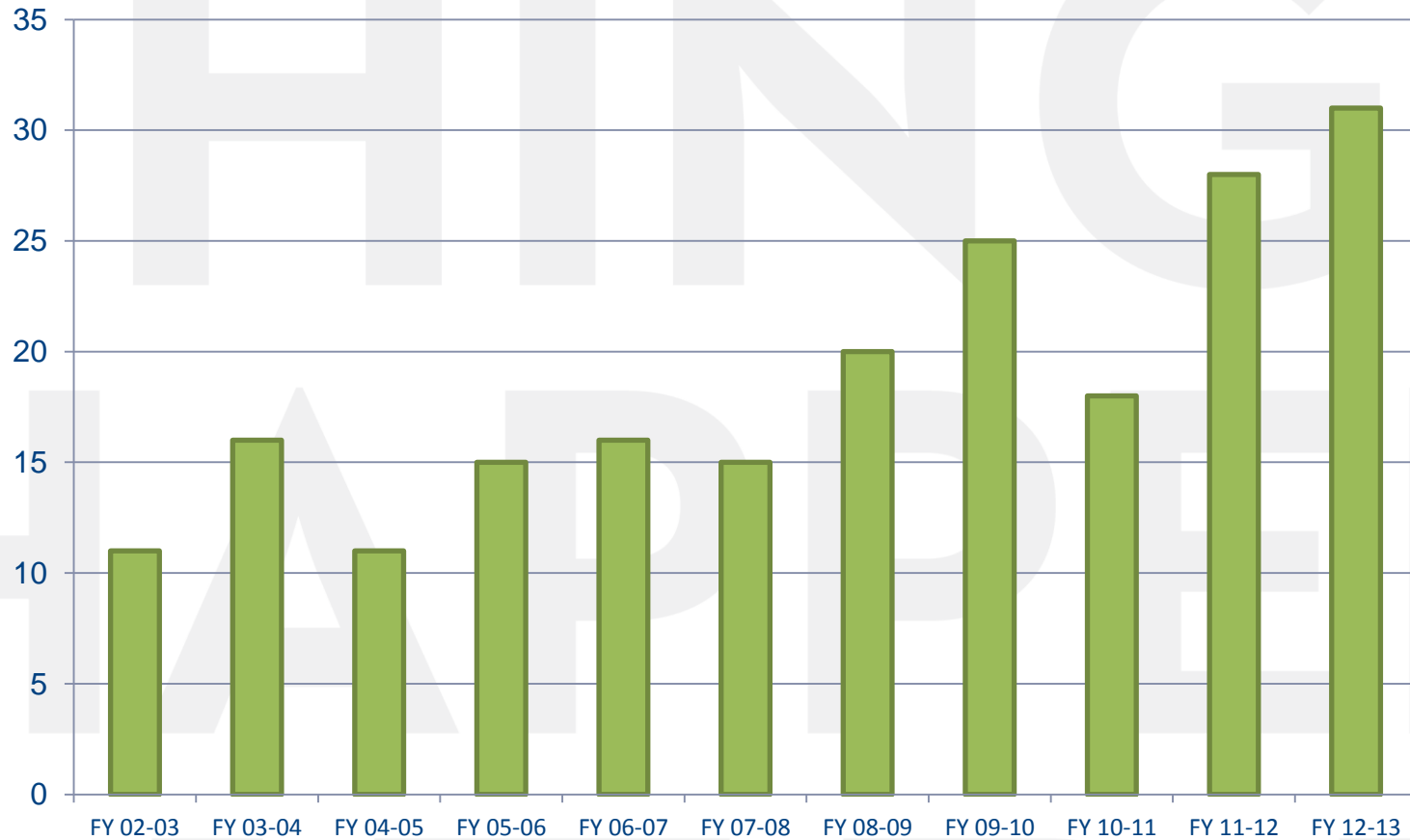
CVB ROOM NIGHTS BOOKED

COMPARATIVE 2003-2013



CVB CITYWIDE MEETINGS BOOKED

COMPARATIVE 2003-2013



PERFORMANCE COMPARISONS

(11-Month Hotel Performance

Change from Prior Year Sorted by Occupancy)

<u>City</u>	<u>Supply</u>	<u>Demand</u>	<u>Occ.</u>	<u>ADR</u>	<u>Revenue</u>
Dallas	0.6%	4.4%	3.8%	7.8%	12.5%
San Francisco	-0.5%	2.9%	3.5%	9.8%	13.0%
Los Angeles	-1.8%	1.1%	3.0%	4.9%	6.0%
Orlando	0.4%	2.5%	2.1%	2.1%	4.6%
DC	0.3%	2.2%	1.9%	2.5%	4.7%
Boston	1.3%	3.1%	1.7%	2.9%	6.1%
US	0.7%	2.1%	1.4%	3.8%	6.1%
Atlanta	0.4%	1.4%	1.0%	3.1%	4.6%
New York	2.4%	3.2%	0.8%	3.0%	6.3%
Chicago	1.9%	1.3%	-0.6%	2.0%	3.4%
New Orleans	0.5%	-0.3%	-0.8%	6.8%	6.5%

TOP 5 AGAIN

(Destination Rankings by Room Night Bookings)

1. Las Vegas
2. San Francisco
3. Orlando
4. Chicago
- 5. Dallas**
6. San Diego
7. Atlanta
8. Washington, DC
9. New Orleans
10. Anaheim
11. San Antonio
12. Indianapolis
13. Philadelphia
14. Denver
15. Houston

What visitors do in Dallas



MAJOR DALLAS ATTRACTIONS

SOME OF THE MOST VISITED LOCATIONS IN DALLAS

- AT&T Performing Arts Center
- American Airlines Center
- Dallas Arboretum and Botanical Gardens
- Dallas Museum of Art
- Dallas World Aquarium
- Dallas Zoo
- Fair Park
- Geo-Deck at Reunion Tower
- George W. Bush Presidential Center
- Klyde Warren Park
- Nasher Sculpture Center
- Perot Nature and Science Museum
- Sixth Floor Museum





THE GREAT PLEISTOCENE EXTINCTION

A Disappearing Act
Envision a world filled with huge saber-toothed cats, four-toe hooves, and mammoths the size of bears. These megafauna roamed North America until about 10,000 years ago. Then, they disappeared, leaving behind a continent of smaller mammals like us. No one knows for sure why so many megafauna went extinct, but scientists have a good idea.

What caused the great Pleistocene extinction?

Select your answer, then hit the key to see if you are correct.



Climate change



Hunting pressure



Disease





GEORGE W. BUSH PRESIDENTIAL LIBRARY AND MUSEUM







BIG

Things Happened

IN BIG D

FISCAL YEAR 2012-2013





1,504,229

TOTAL ROOM
NIGHTS BOOKED

31

CITYWIDE
MEETINGS
BOOKED

*[largest number
in our history]*



\$1.6 Billion

TOTAL ECONOMIC
IMPACT

63.2%

OVERALL
DALLAS
METRO
OCCUPANCY



REPRESENTS A 5% YEAR-OVER-YEAR INCREASE

61,367

Visitors assisted
in the Tourist
Information Center



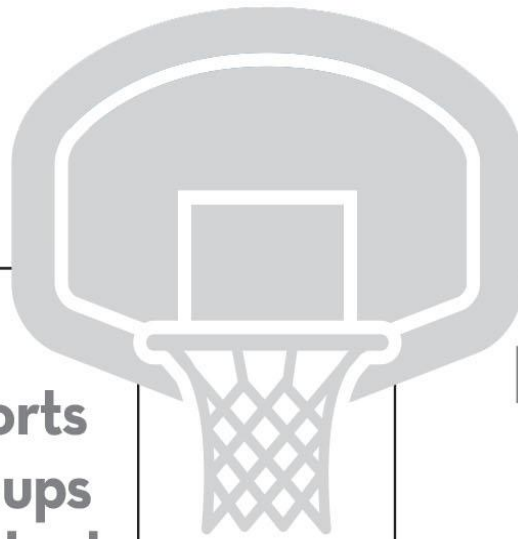
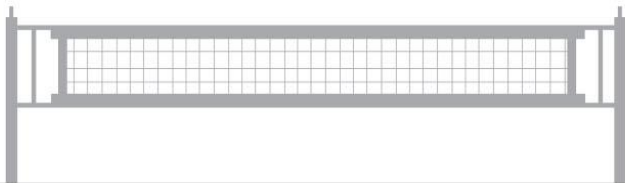
184 Groups
Served



55 Sports groups booked

USA Volleyball Girls' Jr. Nat. Championships

191,600
Record attendance over eight days



Big 12 Women's Basketball Championship

Dallas hosted the **second largest attendance in the history** of the Big 12 Women's Basketball Championships in the first year of being split from the Men's Championship in another city.

W E L C O M E



GENERATED
134,776
Leisure
room-nights

HOSTED
200
Regional and
international
**TRAVEL
TRADE
CLIENTS**



10%
INCREASE
In international
visitors

BIG THINGS HAPPEN HERE

\$4.3
MILLION
Brand campaign

132
MILLION

Media
Impressions
with .12% CTR



FANS GREW BY
54,349
UP 555%



FOLLOWERS
INCREASED BY
92%

VisitDallas.com

VISITS INCREASED

62%
(INCLUDES MOBILE)

WEBSITE HAD

1.8M
VISITORS



DALLAS CONVENTION & VISITORS BUREAU
1st Destination Management Organization in the Country
To create a Diversity and Inclusion Department



WOMEN'S INITIATIVE
High Tea with High Heels
300 attendees

NATIONAL GAY & LESBIAN
CHAMBER OF COMMERCE

Hosted 10th Annual Conference
600 attendees



Includes **87.4%** diverse participants

MegaFest

Largest
city event
hosted
to date

Record
attendance
75,329

DESTINATION FOR FAMILY TRAVEL = DALLAS

- 
Perot
Museum
of Nature
& Science
- 
Klyde
Warren
Park
- 
Bush
Presidential
Center
- 
Rory Meyers
Children's
Adventure
Garden



Exceeded **2M** visitors
to four major city attractions

In 2 decades
\$15B
New development



DALLAS

BIG THINGS HAPPEN HERE

VisitDallas.com/BIGyear

What that meant for the City of Dallas

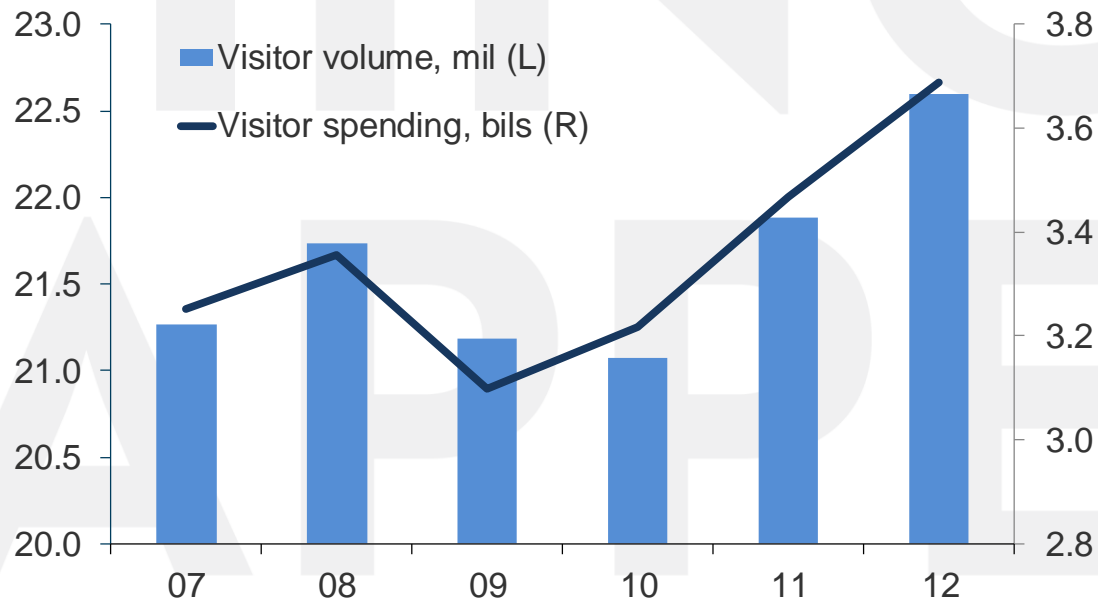


VISITOR IMPACT IN DALLAS

22.6 Million Visitors Spent \$3.7 Billion

Visitor Volume and Spending

City of Dallas



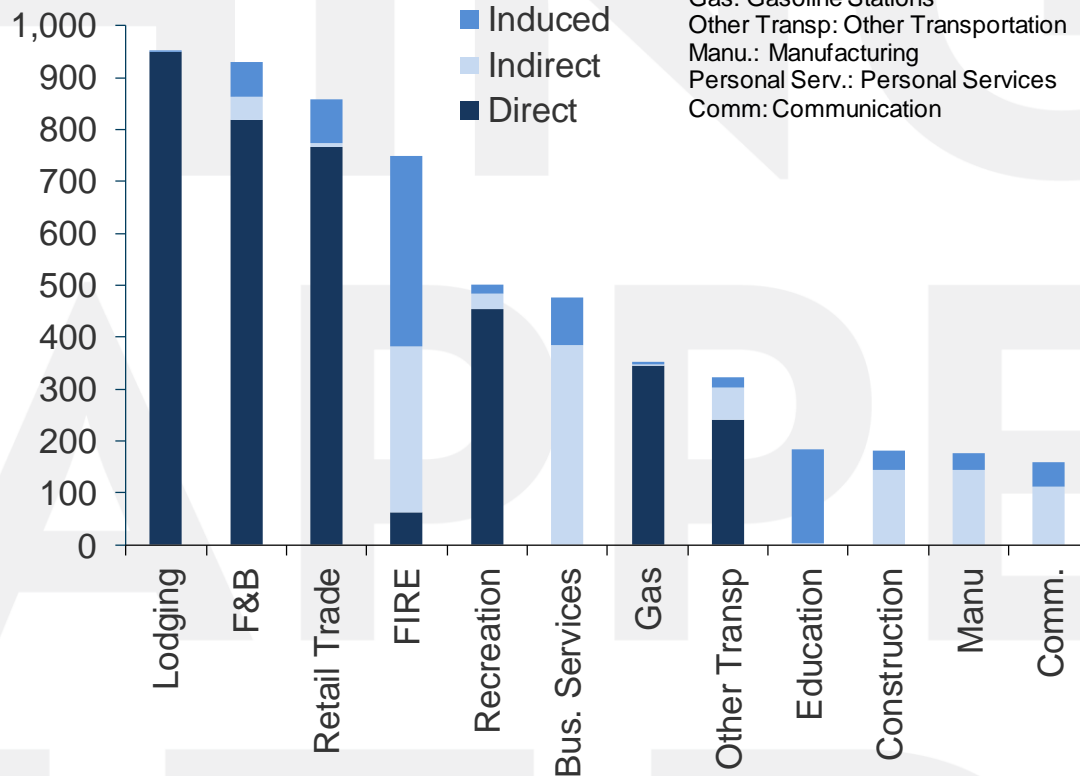
Sources: Longwoods International, STR, Tourism Economics

VISITOR IMPACT IN DALLAS

\$6.2 Billion in Total Sales Revenue

Tourism Sales by Industry

City of Dallas, \$ millions

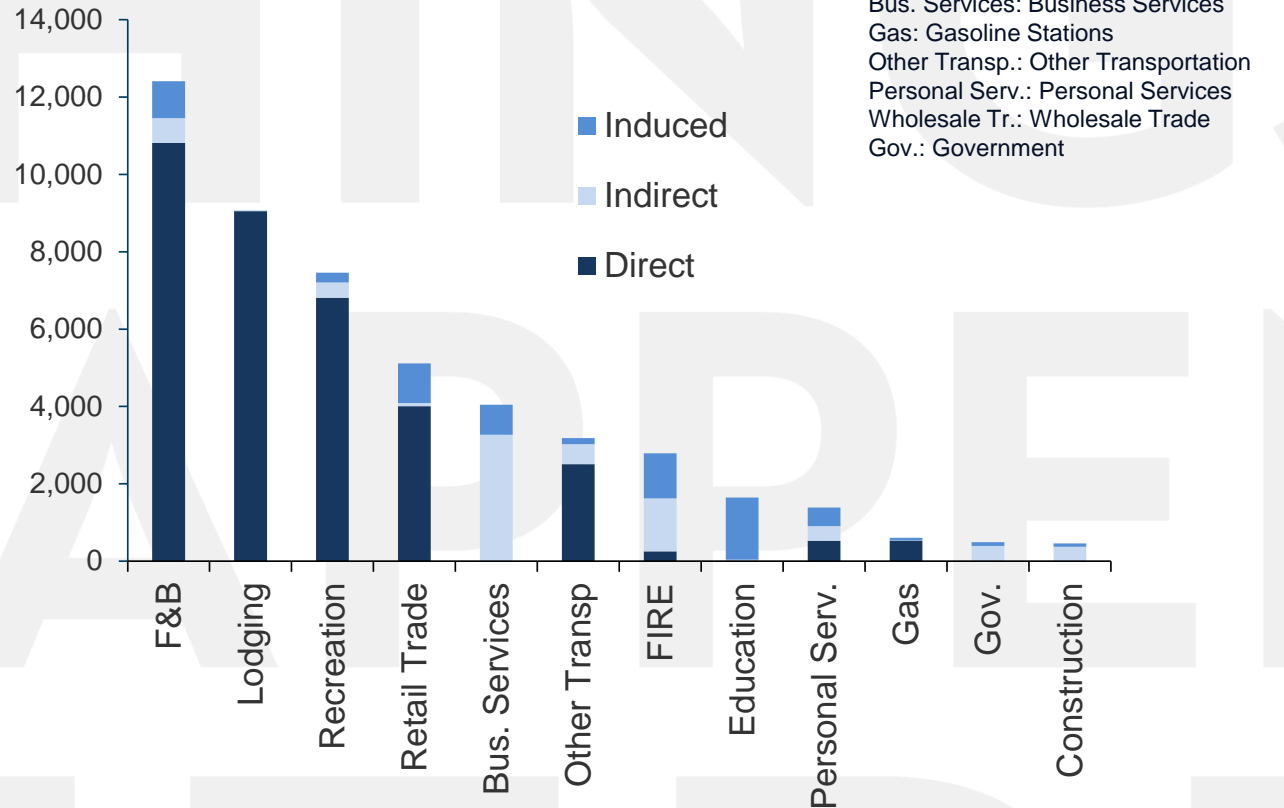


F&B: Food and Beverage
 FIRE: Finance, Insurance, Real Estate
 Bus. Services: Business Services
 Gas: Gasoline Stations
 Other Transp: Other Transportation
 Manu.: Manufacturing
 Personal Serv.: Personal Services
 Comm: Communication

VISITOR IMPACT IN DALLAS

50,000 Jobs Supported by Tourism

Tourism Employment by Industry



VISITOR IMPACT IN DALLAS

Tourism Generated \$724 Million in Taxes

Within the City, tourism-driven state and local tax proceeds of \$365 million helped offset the average household tax burden by \$805 per household.

Tourism Tax Generation (millions)					
Federal	\$359.3	State	\$177.0	Local	\$187.6
Personal Income	\$114.2	Corporate	\$0.2	Sales	\$23.3
Corporate	\$40.5	Sales	\$84.4	Lodging	\$66.5
Indirect Business	\$33.7	Lodging	\$57.0	Property	\$95.0
Social Security	\$170.9	Other Taxes and Fees	\$35.4	Other Taxes and Fees	\$2.9

Customer Perceptions



CUSTOMERS

Reputation of Dallas Meeting Facilities – Historic Trends

<u>Evaluation Characteristic</u>	<u>2007 Rank</u>	<u>2009 Rank</u>	<u>2011 Rank</u>	<u>2013 Rank</u>
Good for Large Trade Shows	8	6	8	10
Excellent Hotel Meeting Facilities	12	12	10	14
Good for International Conventions	16	15	15	14
New/Expanded Convention Center	10	18	14	26

CUSTOMERS

Ranked as Having Built or Expanded Their Convention Center

Las Vegas

New Orleans

Chicago

Nashville

Indianapolis

Denver

Los Angeles

Orlando

Phoenix

Anaheim

Atlanta

Austin

Philadelphia

San Diego

San Jose

Washington, DC

Charlotte

Boston

San Antonio

Vancouver

Competitive Standings



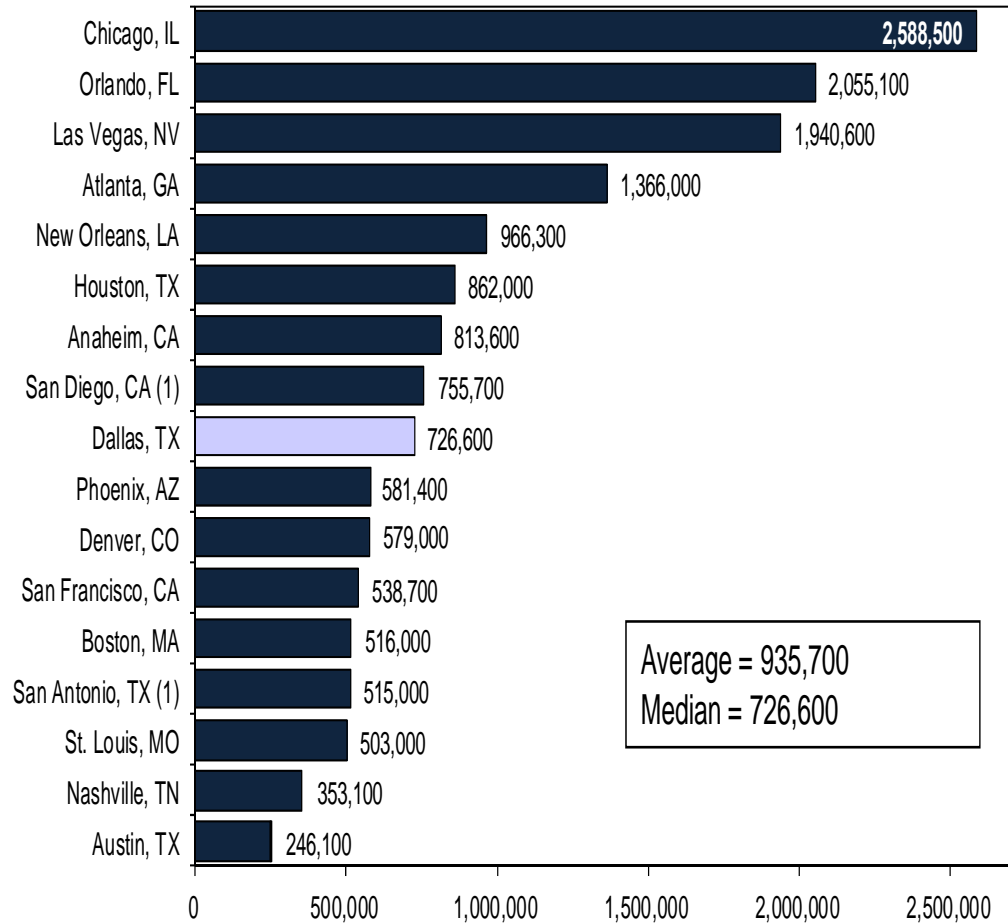
COMPETITION

Current and Recent Projects

- Austin, TX – two new 1,000 room hotels.
- Chicago, IL – new 1,661 hotel rooms.
- Houston, TX – new 1,000 room hotel.
- Indianapolis, IN – recent 1,005 room hotel.
- Los Angeles, CA – recent 1,001 hotel rooms.
- Nashville, TN – new 800 room hotel.
- Orlando, FL – recent 2,150 hotel rooms.
- San Diego, CA – recent 1,190 room hotel.
- Washington, DC – new 1,167 room hotel.

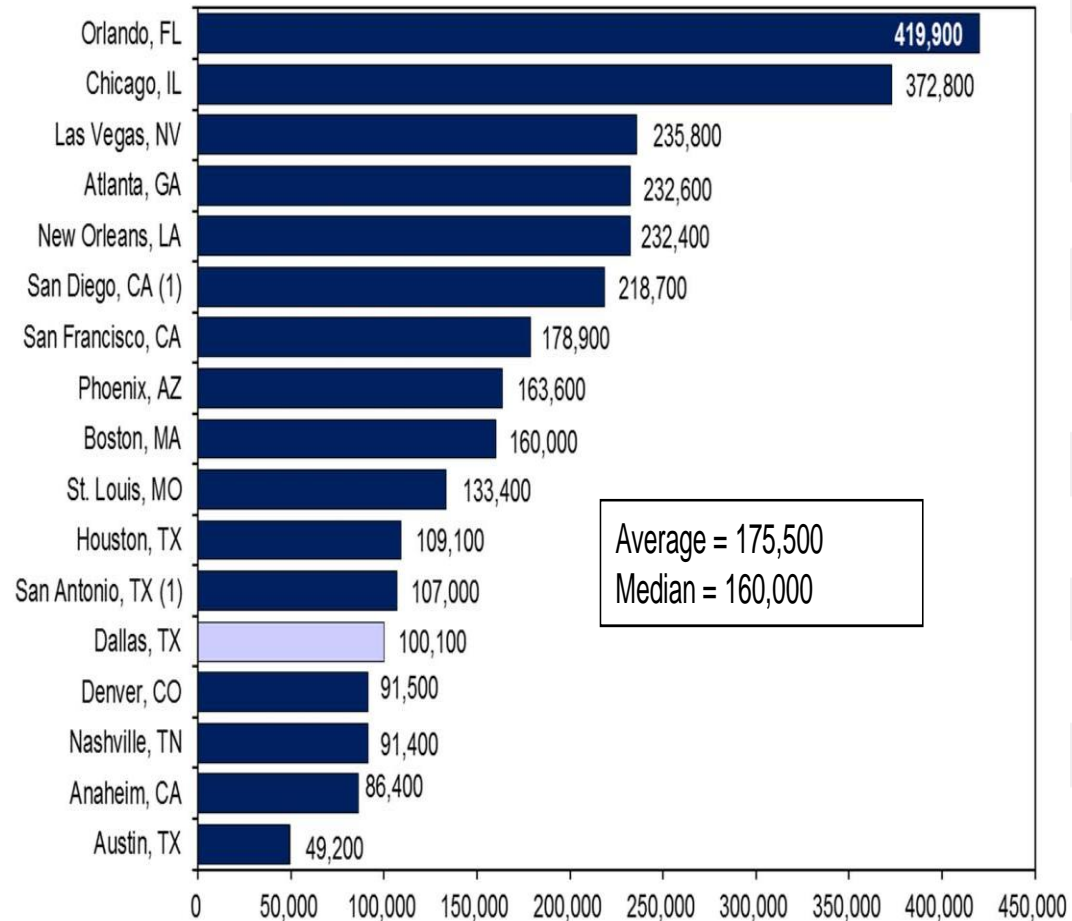
COMPETITION

Exhibit Space



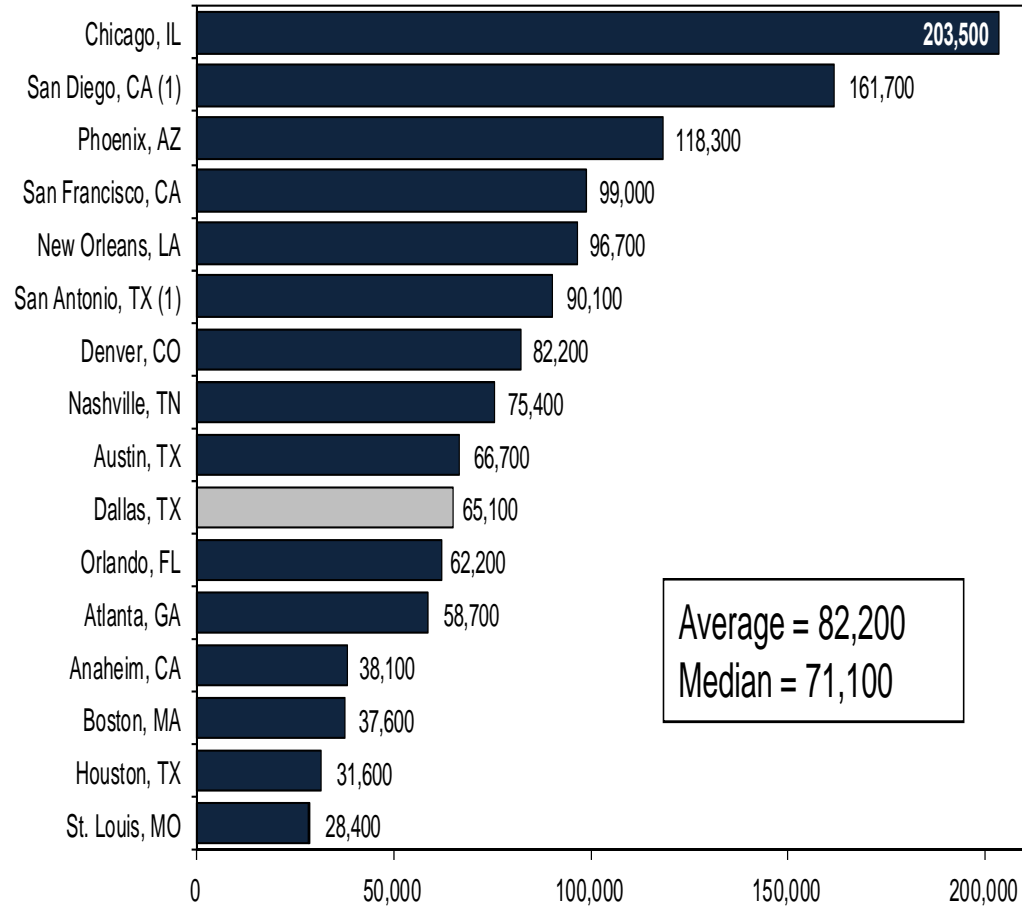
COMPETITION

Meeting Space



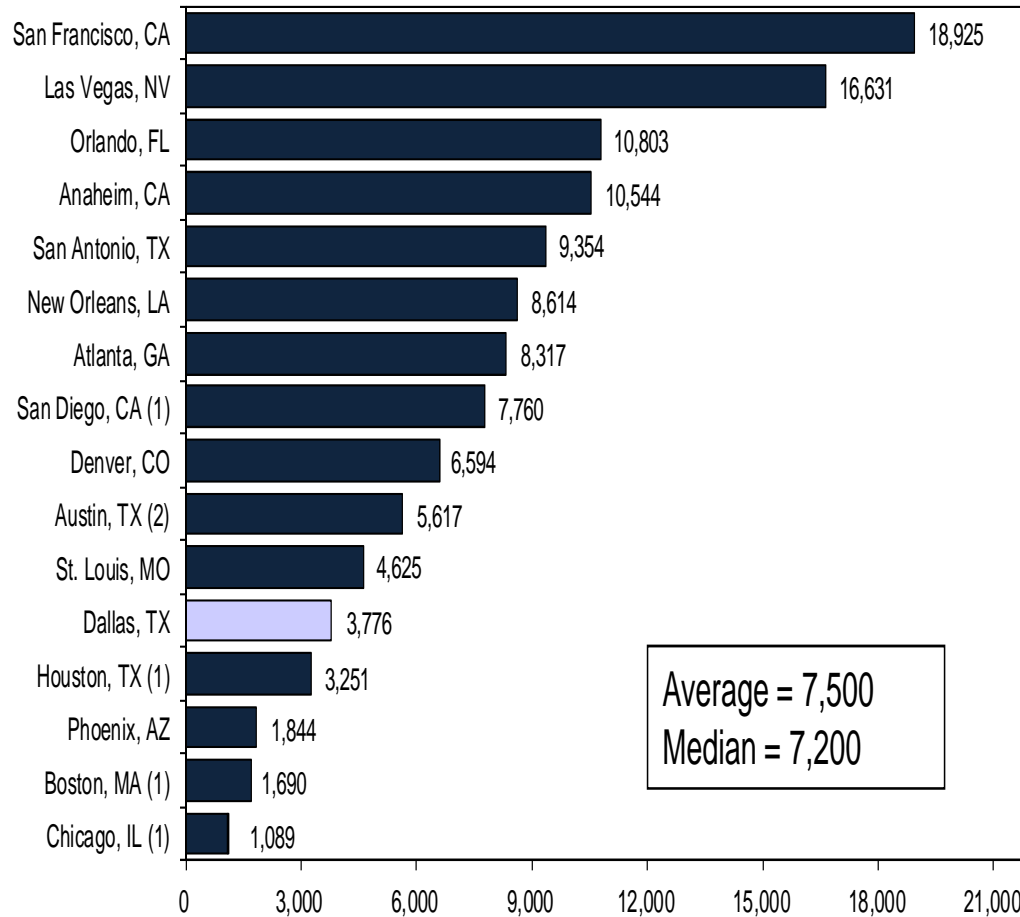
COMPETITION

Ballroom Space



COMPETITION

Hotel Rooms Within ½ Mile of Center



The logo features the word "DALLAS" in a bold, white, sans-serif font. The letter "D" is stylized with a white five-pointed star inside its upper curve. A small "TM" trademark symbol is positioned at the top right of the letter "S".

DALLASTM

Convention & Visitors Bureau

B I G T H I N G S H A P P E N H E R E



Stakeholders Help Drive Our Success



2013-2014 BOARD OF DIRECTORS

DAVE BROWN - CHAIRMAN

American Airlines Center

PEG HALL – CHAIR-ELECT/TREASURER

Dentons US LLP

Finance Committee Chair

MONICA R. ALONZO – VICE CHAIRMAN

Councilmember, City of Dallas

Diversity & Inclusion Committee Chair

BILL BOYD – IMMEDIATE PAST CHAIRMAN

AlliedPRA DFW

Nominating Committee Chair

MICHAEL BEKOLAY

Legends Hospitality Management

AMY W. COWAN

Cowan Roberts Community Relations

TAMMY DEMERY

First National Bank of Omaha

MARTIN BURRELL

The Burrell Group

LAL DASWANI

Dcustomtailors

DARLENE ELLISON

Veritex Community Bank

2013-2014 BOARD OF DIRECTORS

DEAN FEARING

Fearing's Restaurant

DR. ELBA GARCIA

Dallas County

SONNY GARCIA

E-Rewards, Inc.

JENNIFER STAUBACH GATES

Councilmember, City of Dallas

DEREK GEROW

Bain & Company

DARWIN GIBSON

Janssen Pharmaceuticals, Inc.

SAM GILLILAND

Sabre Holdings

TARA GREEN

Klyde Warren Park

NEVIN GRINNELL

Dallas Area Rapid Transit

BILLY D. HINES

NorthPark Management Company

AMY HOFLAND

Crow Collection of Asian Art

LINDA KAO

SMU Cox School of Business

RON KING

Convention & Event Services

City of Dallas

LAURA MacNEIL

Wells Fargo Bank

LARRY MAGOR

Omni Dallas Hotel

MICHAEL D. MCGILLIGAN

Hilton Dallas Lincoln Centre

PAULINE MEDRANO

Community Leader

2013-2014 BOARD OF DIRECTORS

DALE MORRIS

Freeman

MARIE PERRY

Brinker International

STEPHAN PYLES

Stephan Pyles

HAROLD RAPOZA

Hilton Anatole Dallas Hotel

EDDIE REEVES

Reeves Strategy Group

PETE SCHENKEL

Dean Foods

LAURIE SPROUSE

Ultimate Ventures

MITZI TALLY

Dallas Market Center

KERRY TASSOPOULOS

Mary Kay Inc.

KEN THORNTON

FFE Texas-Superior Expo Services

JERONIMO VALDEZ

Valdez/Washington LLP

TONY VEDDA

North Texas GLBT Chamber of
Commerce

ALAN WALNE

Herb's Paint and Body

DANA WILLIAMS

Southwest Airlines

MARK WOELFFER

Renaissance Dallas Hotel

JEFFREY YARBROUGH

bigInk