





Significantly increase the funding available to market and provide incentives to enhance Dallas' performance as a convention and tourism destination.



DPTID's IMPACT

+58.3%

DIRECT VISITOR SPENDING

+19.2%

TOURISM JOBS

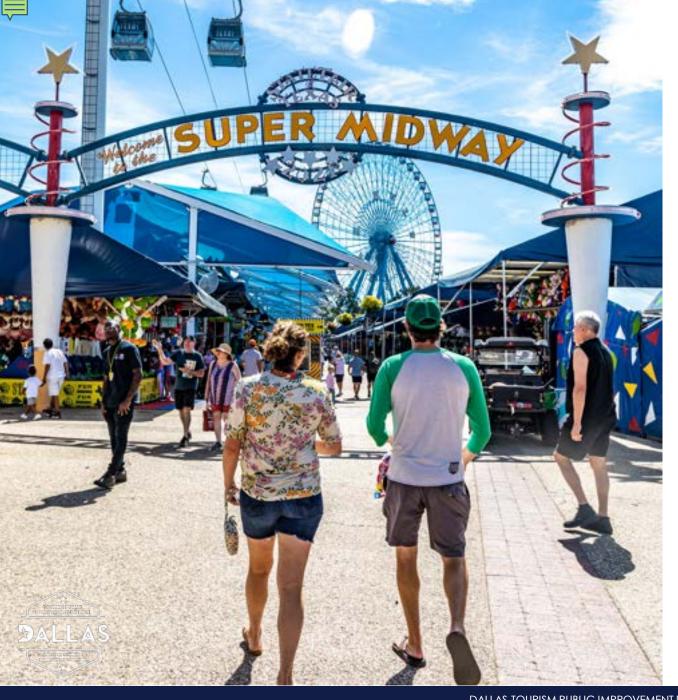
+70.3%

ANNUAL HOTEL REVENUES

+22.6%

VISITOR GROWTH





AGENDA

- 1. Background
- 2. Incentives & Sales Efforts
- 3. Sites & FAMS
- 4. Marketing
- 5. Arts & Event Incentives
- 6. Operations, Administration, Research
- 7. Questions



Created // 2012

Texas' first tourism public improvement district

Renewed // 2016

Based upon the success of the TPID stakeholders renewed for 13-year term

Expanded // 2020

Added twelve properties

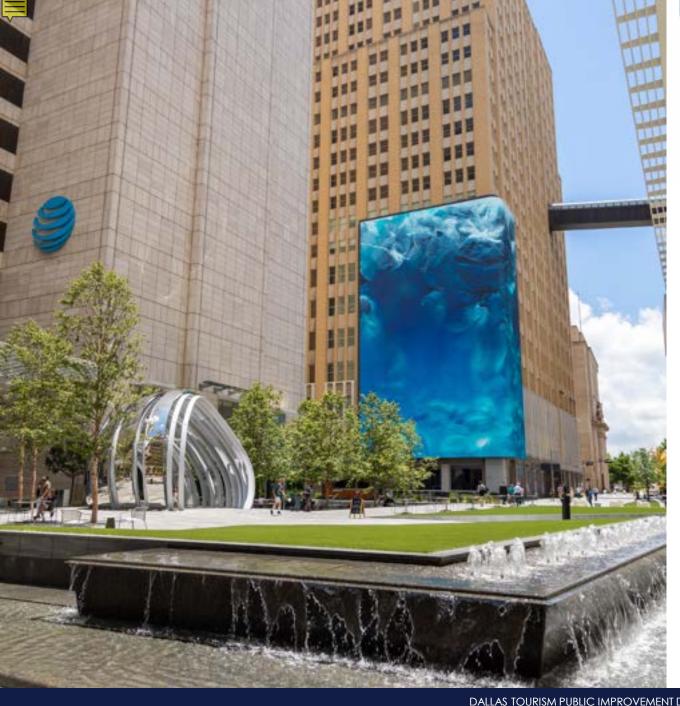
Expanded // 2022

Added six properties

Term Ends // 2029

May be renewed before the end of the term with approval by 60% of the stakeholders





DISTRICT

- Hotels with 100+ rooms
- 137 properties currently in the District
- 80% of room supply and demand in Dallas
- 90% of room revenue in Dallas





Courtesy: Wade Griffith

FY23 EXPANSION



Courtesy: JW Marriott Dallas Arts District





OVERSIGHT

- Dallas Tourism Public Improvement District Corporation - 501 (c) (6)
- Board of Directors
- City of Dallas, Office of Economic Development
- Visit Dallas









BOARD OF DIRECTORS OFFICERS

2022-2024



Greg White Chair of the Board The Westin Galleria Dallas 301-999 rooms



Mark Woelffer Vice-Chair/Treasurer Sheraton Dallas Hotel 1,000+ rooms



Sean Kennerty Secretary Woodbine Development Corporation 100 - 300 rooms



2022-2024

BOARD OF DIRECTORS



Michael Koffler
Hyatt Regency Dallas
1,000+ rooms



Bruce Roy Hilton Anatole 1,000+ rooms



Chris A. Pilavakis Sheraton Dallas Hotel 301 – 999 rooms



Brett Krafft, CMP
Hilton Dallas Lincoln Center
301 - 999 rooms



Robbie TawilDallas Marriott Uptown
100 – 300 rooms



Noeha Coutry
HN Capital Partners
100-300 rooms



Mayur 'Mike' Patel, CHO
Prosper Hospitality
100 – 300 rooms





EX OFFICIO



Craig Davis, CDME President and CEO Visit Dallas



Traci Mayer
Executive Director
Hotel Association
of North Texas



Rosa Fleming
Director, Tourism,
Conventions and
Events
City of Dallas



Jiroko Rosales Assistant Director, Economic Development City of Dallas

















SERVICE PLAN

- Incentives & Sales Efforts
- Marketing & Promotions
- Sites & FAMS
- Event Incentive Fund
- Operations,Research &Administration

10-to-1 ROI





INCENTIVES & SALES EFFORTS

42.5% Service Plan Allocation

Large group incentives Individual hotel incentives Sales efforts



Sales Trends



DPTID's IMPACT

Percentage of Opportunities Won vs Total opportunities

15%

FY04 through FY11 Pre-DTPID

40% FY12 through FY22

For every \$1 the DTPID expended in sales incentives, it has produced

\$14 in hotel room night activity for Dallas.

DTPID

New Incentives Committed mini-wide and citywide events

FY22

Major leads with incentives:

122

Potential hotel room nights:

1.8 million

Incentives approved:

\$39.7 million

Potential contract room revenue:

\$445.7 million

Potential lodging revenue:

\$579.5 million

Potential economic impact:

\$2.4 billion



Booked with Incentives mini-wide and citywide events	FY22
Major events booked with incentives:	41
Estimated hotel room nights:	482,111
Incentives committed:	\$9.3 million
Estimated contract room revenue:	\$111.7 million
Estimated lodging revenue:	\$148.7 million
Estimated economic impact:	\$733.9 million



FY22

Group Production Final

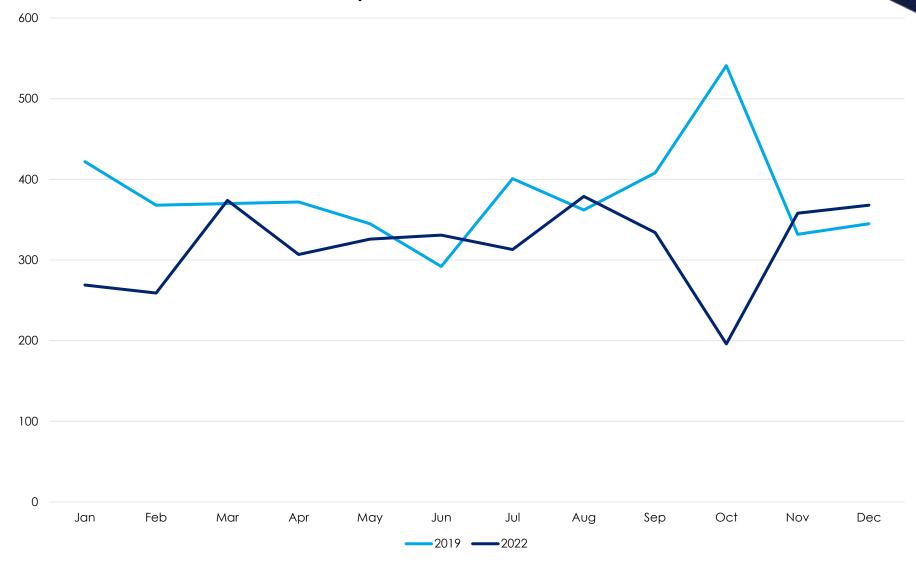
Group Room Night Production	Goal	Actual	% of Goal YTD	Variance
Convention Sales	360,000	395,123	110 %	35,123
Hotel Sales	250,000	385,674	154 %	135,674
Sports	340,000	398,229	117 %	58,229
Total	950,000	1,179,026	124 %	229,026



Lead Comparison

FY22 vs. FY19

Group Lead Volume: 2022 v 2019



Average KBHCCD Size Conversion Rate Growth from 2019

KBHCCD Lead Volume Comparison post-2/9/22 Announcement				
	2/8/2019 - 12/31/2019	2/8/2022 - 12/31/2022	% Change	
Leads Generated	278	199	(28.4%)	
Avg Rooms/Lead	9,200	10,500	14.1%	
Rooms Booked	153,634	250,941	63.3%	
Conversion Rate	23.0%	37.4%	62.6%	



By The Numbers for 2030 & Beyond

Kay Bailey Hutchison Convention Center Dallas

Definite Business

24 Groups 444,250 Room Nights \$627,760,000 Total Spend

New to Dallas:

American Society of Cataract & Refractive Surgery

North American Spine Society

Tentative Business

40 Groups 863,000 Room Nights

*Does not include 2030 NCAA Men's Final Four and the 2031 NCAA Women's Final Four which have been announced.

Prospective Business

24 Groups 479,000 Room Nights





Sales Efforts















Upcoming Conferences	FY23
NYSAE Meet NY 2023	February
Association Forum Healthcare Collaborative	February
SITE Global Conference	February
SISO CEO Summit	March
SITE Tech Summit	May
ECEF Forum	May
PCMA Educon	June
ACCESSE23	July
SISO Summer Conference	August
CEIR Predict	August
ConferenceDirect CDX - Nashville, TN	September
Maritz Elevate Customer Conference	September
MPI Thought Leaders Summit	September
ASAE CEO Summit	September



September

TSAE 2023 New Ideas Conference 2023

Upcoming Tradeshows FY23

MIC Tradeshow March

Informa Pharma Forum

March

ConferenceDirect APM 2023 March

Connect Spring 2023 Las Vegas April

HelmsBriscoe Annual Business Conference 2023 May

Cvent Connect 2023

ASAE Annual Meeting & Exposition 2023 August

Connect Marketplace 2023 Minneapolis August

Maritz Activate Supplier Conference August

SITE Texas Roadshow September



¹Sales calls are funded by Visit Dallas through hotel occupancy tax.

Upcoming Events

FY23

NYC PCMA Chapter Event

February

IAEE Women's Leadership Forum 2023

March

PCMA Visionary Awards

April

Minn./St. Paul Destination Event & Sales Calls

May

Ohio Destination Celebration Event

June

Mid-Atlantic CEO InMarket Event

September

West Coast CEO Event

September

Indy Destination Celebration Event Sales Calls

September





Creating New Relationships



SITES & FAMS

10% Service Plan Allocation







53 DallasSportsCommission

34 ClientServices













Upcoming Sales FAMS

FY23

MidAtlantic-Springsteen

February

Mays vs Warrior - West Coast

March

HelmsBriscoe Luke Combs - Judi McLaughlin's Team

March

Lippman Connects Large Show Round Table

April

Ed Shearon

May

Midwest

May

ConferenceDirect - Doug Baarman Team Meeting

June

Riverfront Jazz Festival

September

Madonna Citywide Client

September





Tourism // Client and Media 24 FAMS

USA Mexico Colombia **Netherlands** Belgium **Latin America** Germany Spain **United Kingdom** India









Upcoming Tourism FAMS	FY23
Viajes El Corte Inglés, Mexico	February
House of Travel, New Zealand	February
Texas Reverse Mission FAM Mexico	March
Canusa, Germany	May
AA MICE France	May
Pre IPW international	May
Post IPW International	May
Volaris Media FAM	Spring
Aeromexico Vacations Groups accounts	Spring
TUI United Kingdom	Summer



Fall

Helloworld Australia





Hotel Incentive Fund







Applications: 479

Hotels Participating: 35

Approved Funds: \$3.3 million

Applications Funded: 248

Funded: \$1.2 million

Room Nights: 76,347



lifetime

Applications: 2096

Hotels Participating: 62

Approved Funds: \$14.1 million

Applications Funded: 927

Funded: \$4.2 million

Room Nights: 1 million





HOTEL INCENTIVE FUND

- Available to all District hotel properties per the PID assessment roll
- Groups must contract ten or more rooms on peak
- \$150,000 from Oct. 1, 2022
 September 30, 2023





Hotel Incentive Fund Overview

\$ 2,780

Est. total contract rooms

Multiplied by average room rate

Total room revenue

Divide by 10

Available DTPID incentive









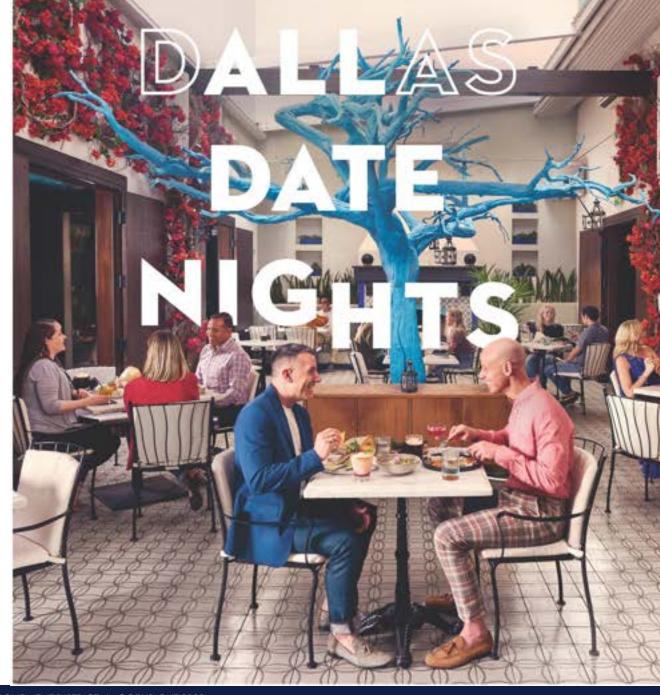




MARKETING

35% Service Plan Allocation

Marketing
Advertising campaigns
Leisure & Trade





FY2022 PAID MEDIA RECAP





Campaign Parameters

Objectives

- Drive awareness and consideration of Dallas
- Drive website visitation and actions/engagement

Leisure Audience

 A 25-54, with and without children - three primary segments

Trade Audience

Meeting and event planners

THE FAMILY-FUNNERS

- 35-44
- Married
- HHI \$150K+
- Kids 3-9 in HH
- Life stage: Young Family



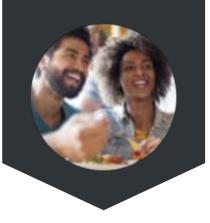
THE GETAWAYERS

- 45-54
- Married
- HHI \$75K-\$150K
- Kids 12-17 in HH, adult children, or no children



THE NIGHT-LIFERS

- 25-34
- HHI \$50K+
- Leisure/hobbies: Go to bars, see live music, visit nightclubs.

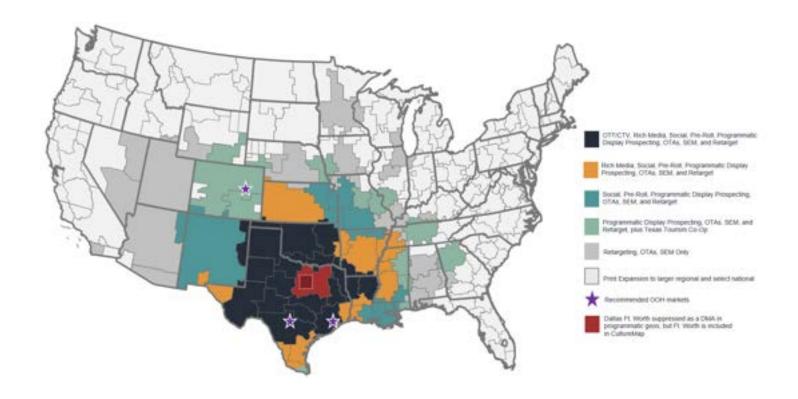






Geography

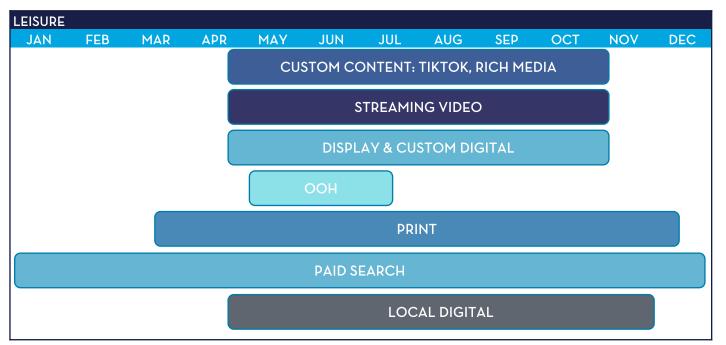
While still being highly selective, we expanded our geographic footprint for FY22 to include select fly markets, along with testing a meaningful presence in Denver







\$2.6M





Budget and Timing

Focus on Spring and Summer Seasonality with upper funnel or high impact channels

Hard-working paid search & social running on an evergreen basis

Print issues align with relevant editorial





New and Noteworthy

APRIL / MAY









APRIL
Added Nightlifer
Segment

APRIL
LGBTQ+ organically
integrated into
campaign in terms of
creative and
placement

MAY

Pilot Fly Market Test: Denver launches After much anticipation, the development of Dallee' expanded convention center is a go. This is exciting news for our city and meeting planners who are looking for a garnechanger experience in the future.

JUNE
Incremental \$120K
Convention Center Trade campaign launches

conventioncenter.vis/tdallas.com

ANNOUNCING

DALLAS CONVENTION CENTER EXPANSION COMING 2029 JUNE / JULY







AUGUST

Matador launches TikTok videos of unique Dallas neighborhoods





RESULTS



FY22 Campaign Results

(vs FY21)



We optimize our media to post-click action, or "lead"

-72%

COST PER WEBSITE

ACTION +

CONVERSION

\$40 vs \$147



Post click action defined as clicks from Homepage to Things to Do, Events, Blog, Meeting Planner Pages, event or venue websites, or Trade RFP/Service Requests.



Advertising Effectiveness: Insights

- As of September, Visit Dallas' 2022 campaign already reached more traveling households than any of its prior campaigns: 5.3 million households, up from 3.2 million in 2021.
- At just \$0.31 per aware household, **Visit Dallas' 2022 campaign is significantly more efficient than the benchmark (\$0.50).**
- This level of efficiency is an indicator that higher spending and wider geography are working well. However, SMARInsights is seeing a much more competitive travel landscape as destination marketing has returned full force. Visit Dallas' strategy of cultivating new markets is prescient.
- The challenge for Visit Dallas in newer markets will be to continue to focus messaging there long enough for the ad investment to pay off.
- The 2022 campaign positively impacts familiarity with Dallas as a leisure destination.
- The campaign also positively impacts likelihood to visit Dallas in the coming year, pointing to an overall positive result in the ROI wave of research.

Source: SMARI 2022 Advertising Effectiveness Study





Campaign Performance: City of Dallas Room Nights

- 2021 paid marketing generated 125,052 Dallas visits.
- Of these, **nearly 8 in 10 were overnight stays**. And of those almost 100,000 overnight Dallas trips, two-thirds used paid lodging in the city.
- With an average stay of just over two nights, and 1.3 rooms on average per travel party, the 2021 campaign generated more than 193,000 room nights in city lodging.
- This represents 4% of total room demand from May-December 2021.

2021 City of Dallas		
НН	7,710,600	
Awareness	41%	
Aware HH	3,194,732	
Travel increment	4%	
Incremental trips	125,052	
% Overnight	79%	
Overnight trips	99,238	
% in paid lodging	66%	
Paid lodging trips	65,990	
# rooms	1.3	
# nights	2.1	
Room nights	193,020	

Source: SMARI 2021 Advertising Effectiveness Study

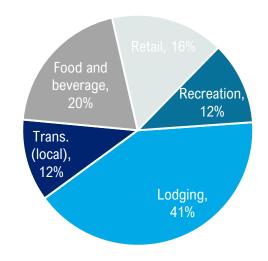


Campaign Performance: Trip Spending

- The net of spending across all city overnight visits influenced by the 2021 campaign is nearly \$79 million, which equates to \$150 spent per visitor per day.
- Lodging is the largest share of spending at 41%, up from just a third (34%) of 2020 trip spending, and higher than 2019's 38%.
- The \$122M economic impact represents a 59% increase over 2020.
- Viewed in light of Visit Dallas' investment of just over \$1 million, the return is \$120 for every dollar spent on advertising.

Incremental spending	2021
Lodging	\$32.2M
Transportation, local	\$9.1M
Food and beverage	\$15.7M
Retail	\$12.5M
Recreation	\$9.1M
Total	\$78.7M

Shares of visitor spending



Economic Impacts (in \$millions) Total \$122.3



Source: SMARI 2021 Advertising Effectiveness Study



FY2023 PAID MEDIA: PRELIMINARY RECOMMENDATIONS





2023 Media Plan Highlights

\$3,725,188 Total Budget (35% increase vs. FY22 \$2,760,128)

- **185** MM impressions (63% increase vs. FY22 117 MM planned impressions)
 - 81 print pages
 - 37 annual partners
 - 20 custom native assets
 - 4 custom partnerships
 - 2 Fly Market multimedia campaigns





Media Objectives & Strategies

Objective:

Drive website traffic and awareness of Dallas as a premier leisure and trade travel destination.

Approach:

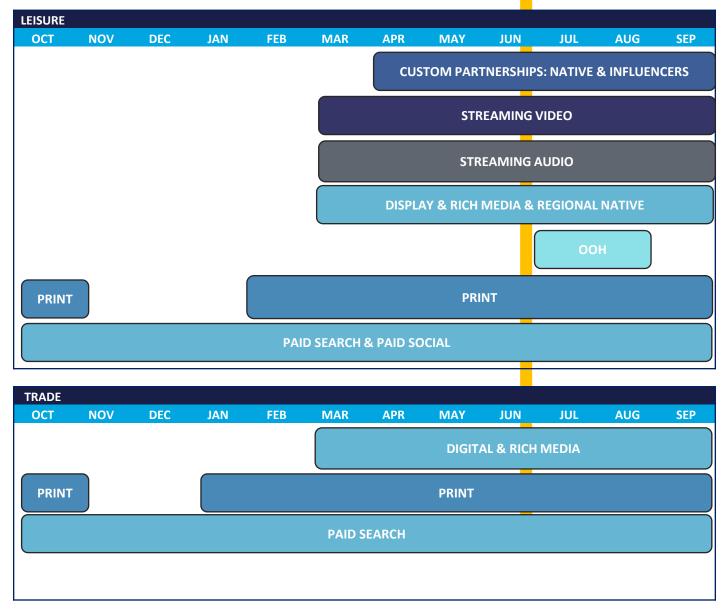
- Create a fiscal year plan that cohesively builds up the Find Your All campaign and upcoming new Unified Brand launch
- Curate custom partnerships that amplify stories about Dallas travel through print, online, social, video and the Visit Dallas blog
- Renew strong performers and test new partners to drive success





Campaign: Find Your All

Campaign: Unified Brand



In-Market Timing

Ramp up beginning in the Spring

Build momentum towards the new campaign launch mid-late Summer

Unified Brand campaign launch

- July to September
- Influencer partnership
- New native articles
- Print upgrades to 2 Page Spreads
- New messaging rotates into digital





New & Noteworthy - Leisure



Travel Influencer video experience + advertorial on Dallas

match

Sponsor dates at Dallas locations and then showcase footage via programmatic and social

Tripadvisor

Curated branded 'Explore Dallas' channel + publisher articles on Dallas

PASSPORT TRAVEL - CULTURE - STYLE - ADVENTURE - ROMANCE

Travel influencers experience Dallas tourists' attractions / LGBQT+ venues

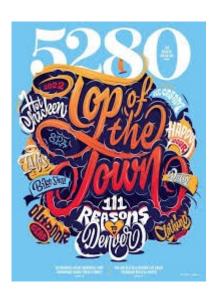


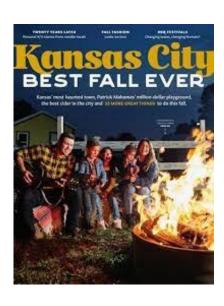


New & Noteworthy -Fly market Leisure plans Denver & Kansas City

- Multimedia plans to drive awareness and traffic
- High impact OOH takeovers for Unified launch
- Selected top publication in each city

Local Print





OOH - Denver - Train Wrap



OOH – Kansas City - Digital







New & Noteworthy - Trade Creative examples only

Premium Print – PCMA Destination Profile







New & Noteworthy – Trade

High Impact Rich Media: Interactive Ad Units allow users to explore different areas of Dallas relative to the Convention Center

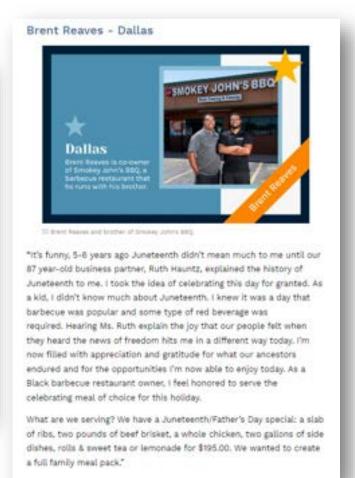
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	the total Annual Control
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Sparkfole Studie Linear (mark production or support or	
Optionsed to every device	





Public Relations // Media 16 FAMS

beckystravellist · Following Eduardo Lubgyiños + Lose Control (Future House Remix) Giant Eveball beckystravellist. Three free, unique things to see in Dallas! Save for locations Traveling Man: There's 3 located in the Deep Ellum Neighborhood: Awakening, Waiting on a Train, & Walking Tall. Start on 2605 Elm St. to 2606 Swiss Ave & Ti Circular drain waterfall located in Connor Park \$4301 St. Johns Drive If Giant Eyeball ₹1601 Main St + Add these unique things to your ○ Liked by visit dallas and 1,929 others (u) Add a comment...



FY22





Brand Identity



Next Steps

- Agency of Record RFP; Campaign Development & Launch
- Coordinated Brand Rollout Plan
- Future Committee Participation
- Brand Launch Event (Target July/August 2023)







EVENT MARKETING INCENTIVE FUND

7.5% Service Plan Allocation





- \$25,000 maximum per organization, per fiscal year
- Events must benefit DTPID participant hotels
- Events must generate a **minimum of 30 hotel rooms nights**
- Events must be open to the public
- Applicant must demonstrate marketing and promotions
 to communities outside of the 50-mile radius of Dallas
 with the intent to increase the visibility of Dallas as an
 overnight destination
- Events cannot be primarily a fundraiser or gala;
 a fundraising component is permissible
- Non-profit entities eligible for up to 50% of approved funding upfront
- Events receiving other DTPID funds are ineligible
- Expos and Conventions are not eligible for the event incentive fund
- Alterations to forms may result in rejection of the application



Event Marketing Incentive Fund

Approved Applications: 8

Final Funded Events': 72

Hotel Room Nights Generated: 424,497

Approved Funds: \$1,717,527

Unconditional Pre-Payments²: \$ 616,632

Final Funded: \$1,485,652

¹DTPID pre-approved 9 events for fiscal year 2022 that due to COVID-related difficulties were either canceled or rescheduled for FY2023.

²Qualified non-profit groups may receive a portion of the approved funding in advance for marketing purposes. The funding may be received in the previous fiscal year.





Event Marketing Incentive Fund

Pre-Approved Applications:

72

Includes events rescheduled from FY22

61 Cultural Events 11 Sports Events

Pre-Approved Funds:

\$1,477,752

YTD¹ Final Funded Events:

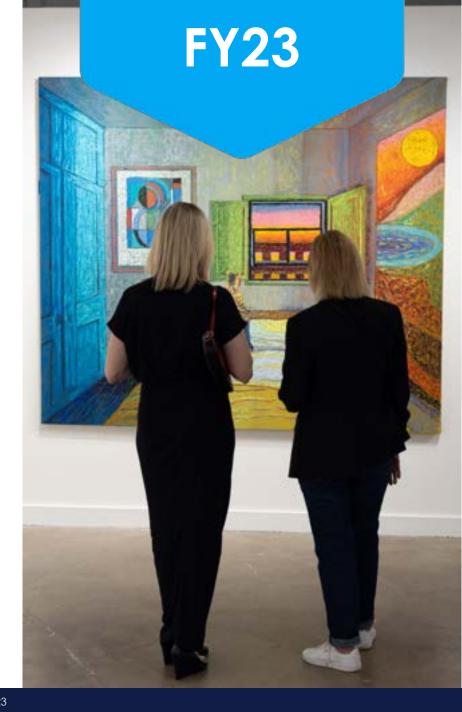
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YTD¹ Estimated Room Nights:

6,348

YTD¹ Total Funded:

\$463,370²



¹DTPID funded year to date (YTD)as of February 2023. ²Includes \$394,221 in Unconditional Pre-Payment to Non-Profit Applicants



Event Marketing Incentive Fund

lifetime



+\$1 MILLION ANNUAL ALLOCATION



+\$10.2 MILLION FUNDED



+223 ORGANIZATIONS



+\$13.2 MILLION APPROVED



+677 EVENTS



+1.6 MILLION ESTIMATED ROOM NIGHTS





ADMINISTRATION OPERATIONS RESEARCH

5% Service Plan Allocation

Research Recordkeeping Risk management Accounting Audit and tax Consulting Administration





FY22 Financial Summary

REVENUE

Assessment revenue	\$ 17,386,756
Interest income	78,721
Total revenue	17,465,477

EXPENSES

Incentives and sales efforts	5,734,592
Marketing	5,241,769
Sites and FAMS	1,015,388
Event funding applications	1,319,953
Operations	670,701
Total expenses	13,982,403

3,483,074



FY23 - FY27

Five-Year Service Plan Budget

Incentives & sales efforts
Marketing
Site visits & familiarization tours
Event funding applications
Operations/Research/Administration

	FY23	FY24	FY25	FY26	FY27
42.5%	\$ 8,451,975	\$ 9,273,925	\$ 9,975,175	\$ 10,568,900	\$ 11,097,175
35.0%	6,960,450	7,637,350	8,214,850	8,703,800	9,138,850
10.0%	1,988,700	2,182,100	2,347,100	2,486,800	2,611,100
7.5%	1,491,525	1,636,575	1,760,325	1,865,100	1,958,325
5.0%	994,350	1,091,050	1,173,550	1,243,400	1,305,550
100.0%	\$ 19,887,000	\$ 21,821,000	\$ 23,471,000	\$ 24,868,000	\$ 26,111,000

Expenditures are limited to actual collections not to exceed the 2% fee on each occupied room as defined in the petition.

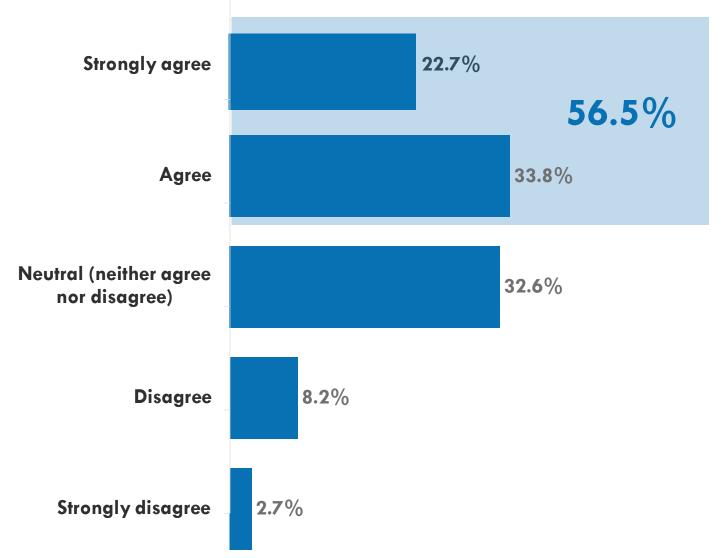
Dallas TPID fiscal year is October 1 - September 30.



State of the American Traveler – Expectation of Recession

Question:

I expect the United
States will enter an
economic recession
sometime in the NEXT
SIX (6) MONTHS.

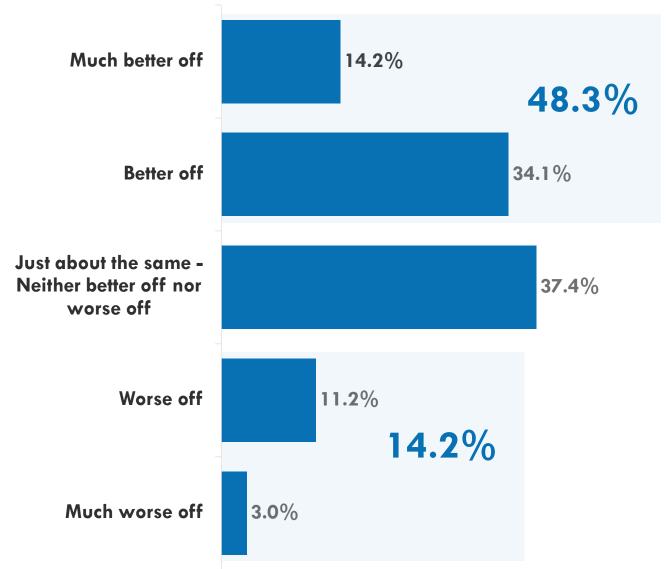


Source: Destination Analysts

State of the American Traveler – Expectation of Recession

Question:

LOOKING FORWARD Do you feel that a year
from now, you (and
your household) will be
better off financially, or
worse off, or just about
the same as now?

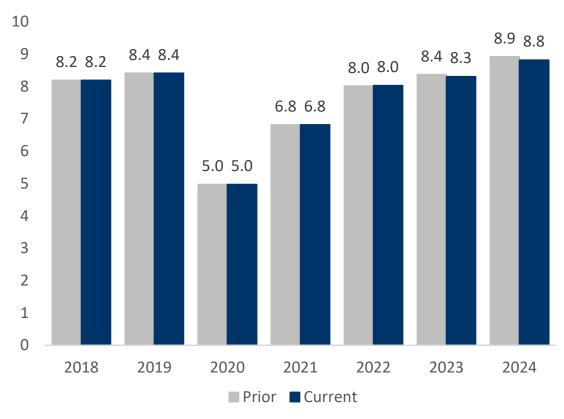


Source: Destination Analysts

Tourism Economics Forecast Update

Forecast comparison: Demand

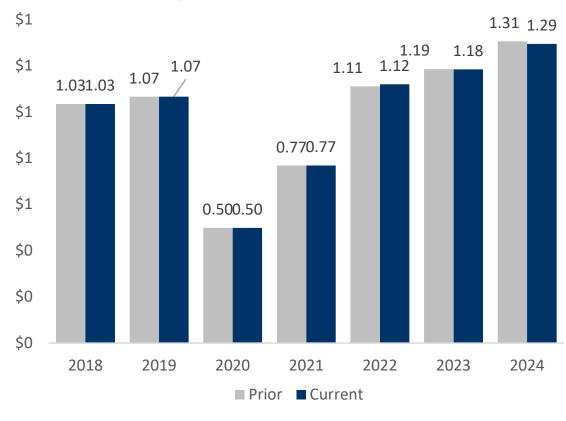
Annual room nights, in millions



Source: STR; Tourism Economics

Forecast comparison: Room revenue (STR)

Annual room revenue, in billions



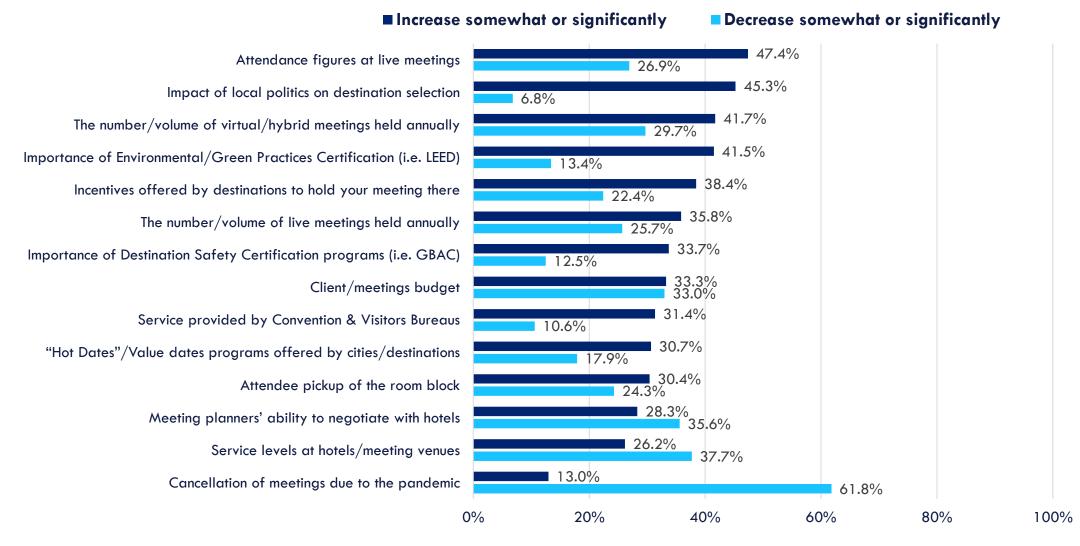
Source: STR; Tourism Economics





THE CVB & THE FUTURE OF THE MEETINGS INDUSTRY

Executive Summary



Source: Destination Analysts

Question: Thinking about the future of the meetings industry, in the next 3 years, how do you expect the following factors related to the meetings industry to change (if at all)?

THE CVB & THE FUTURE OF THE MEETINGS INDUSTRY

Executive Summary

Relative to 2022, planners are anticipating the volume of live meetings to increase in 2023 but they also anticipate the continuance of hybrid meetings as well.

Booking windows continue to be shortened relative to pre-pandemic times with nearly half (48.1%) of planners booking events 6-12 months in advance and over one-infive (22.4%) booking live event venues less than 6 months out. Unfortunately, compression caused by postponed meetings and high leisure demand are making it more difficult to source.

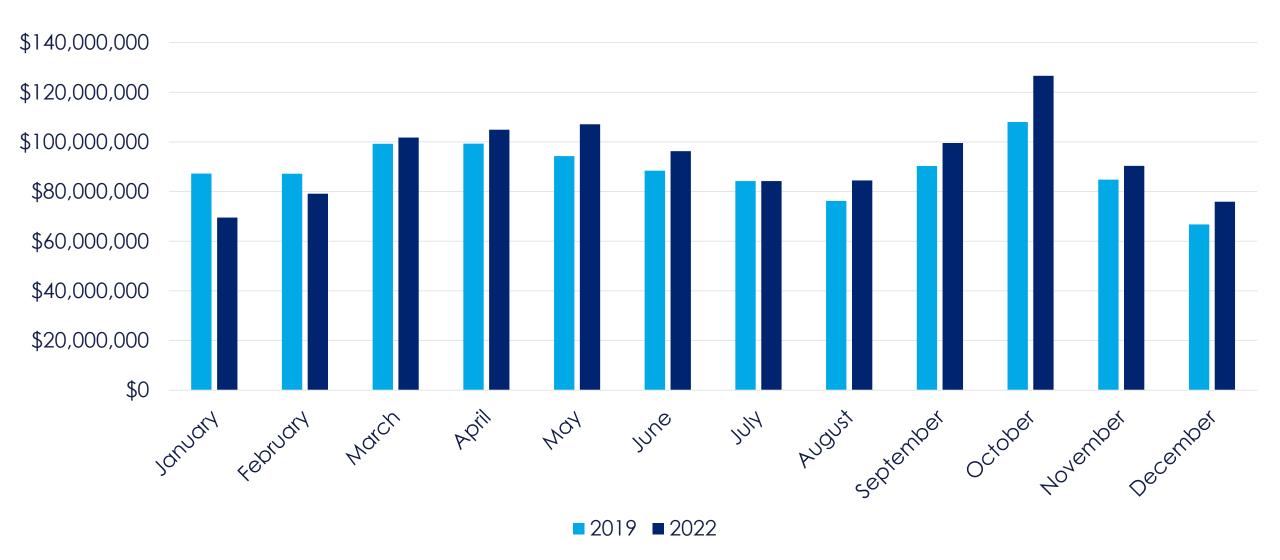
Anticipated Meeting Volume By Type For 2023 vs. 2022 & 2021



Questions: 1. In 2021, how many live, virtual and hybrid meetings have you been involved in the planning of? 2. In 2022, how many live, virtual and hybrid meetings have you been involved in the planning of? 3. Looking ahead, how many live, virtual and hybrid meetings do you anticipate planning for all of 2023?

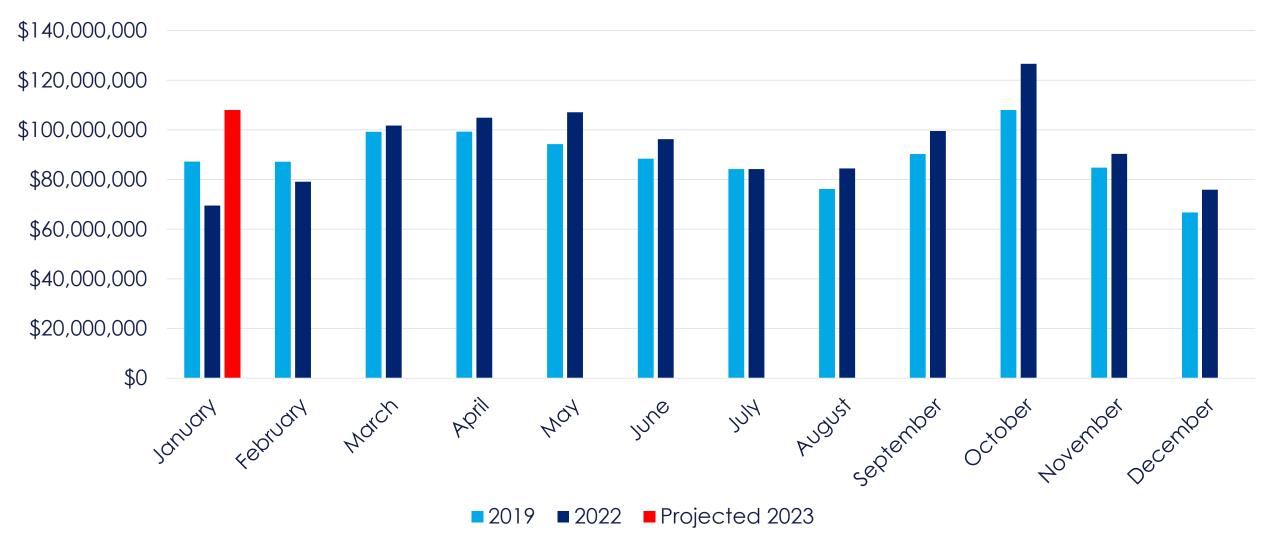
Source: Destination Analysts

Dallas Hotel Revenue Performance



Source: STR

January Dallas Hotel Revenue Soars



Source: STR





Excitement Ahead

NCAA Women's Final Four

Division I, II and III

March 31 – April 2, 2023



LOOKING FORWARD

Excitement Ahead

FIFA World Cup 2026TM



LOOKING FORWARD

Excitement Ahead

Convention Center & Fair Park 2028





DALLAS CONVENTION CENTER TIMELINE









NEW CONVENTION CENTER CONSTRUCTION BEGINS

NEW CONVENTION CENTER OPENS!



2024

2025

2026

2028

AVAILABLE SPACE -

724,526 SF BALLROOM: 65.339 SF MEETING: 99,736 SF

- · Site work begins on new convention center
- · Halls A. B. C. D. E. F available
- · Vertiport and Hall F loading dock demolished
- · Freight access to Hall F through Hall E
- · Arena interior renovations begin

AVAILABLE SPACE -EXISTING KBHCCD

417, 488 SF BALLROOM: 65,339 SF MEETING: 99,736 SF

- · Halls E and F demolished
- · Halls A. B. C. D available

AVAILABLE SPACE -EXISTING KBHCCD

304,250 SF BALLROOM: 46,199 SF MEETING: 60,564 SF

- · Hall D demolished
- · Halls A, B, C available
- · Access between Hall C and Omni Hotel via temporary sky bridge
- · Arena interior renovation complete

AVAILABLE SPACE -**NEW CONVENTION CENTER**

800,000 SF EXHIBIT: BALLROOM: 170,000 SF 260,000 SF LOADING DOCKS: 65+ PARKING: 2.000+

- · New planned high-rise hotel opens adjacent to new convention center
- Remaining KBHCCD demolition and Convention Center District development begins
- · Development of deck park connecting Downtown to Cedars District continues
- · Arena exterior refurbishment begins







