Welcome!

April 19, 2023
Word of The Year

2020

Unprecedented!

2021

2022

Complicated

2023

Growth
Traveler Sentiment

• Nearly 85% of American travelers have trips planned.

• The typical American traveler says they expect to take 3.5 leisure trips in the next 12-months

• Trip-takers spent an average of 2.5 hours planning or researching their trip AFTER they arrived in their destination

• Pet Peeves: Flight delays (#1), price gouging (#2), dirty hotel rooms (#4), road construction

Source: Destination Analyst
Impact On Travel Plans

Travelers with Travel Plans in the Next Six Months Comparison

Source: Longwoods International
## Impact On Travel Plans

<table>
<thead>
<tr>
<th>Impact</th>
<th>3/29</th>
<th>3/1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coronavirus</td>
<td>12%</td>
<td>-1%</td>
</tr>
<tr>
<td>Financial Situation</td>
<td>24%</td>
<td>-1%</td>
</tr>
<tr>
<td>Transportation Cost</td>
<td>18%</td>
<td>-9%</td>
</tr>
<tr>
<td>Gas Prices</td>
<td>21%</td>
<td>-3%</td>
</tr>
<tr>
<td>Inflation</td>
<td>26%</td>
<td>-6%</td>
</tr>
<tr>
<td>Airfare</td>
<td>25%</td>
<td>-5%</td>
</tr>
</tbody>
</table>

Source: Longwoods International
Domestic Business Travel

- Business travel continuing to recover
- The return to the office, coupled with easing restrictions
- Pent up demand for more face-to-face professional interactions
- The resumption of large conferences and conventions
- Slowing economy and an expected decline in corporate profits and stalled business investments
- Workforce shortage will likely remain a key challenge

* Source: USTA
U.S. Travel 2023 Forecast

- **Continued resilience of domestic leisure travel**, which has surpassed pre-pandemic levels

- **Continued improvement in domestic business travel**, with a slight slowdown in 2023 as the economy enters a mild recession. A full recovery in terms of volume is still forecast for 2024, but inflation-adjusted spending recovery remains beyond the range of the forecast

- **Sluggish recovery for international inbound travel** as it continues to face headwinds, with a full recovery not expected prior to 2025

Source: U.S. Travel Association Semi-Annual Forecast, Fall 2022
Downtown Issues

PROBLEM SOLVERS

Safety concerns raised for convention center visitors

by: Vivente Arenas
Posted: Jan 13, 2023 / 06:41 PM MST
Updated: Jan 15, 2023 / 06:41 PM MST
Safety Plan

- October 2022 - Mayor, in collaboration with local, state, and federal agencies launched an enhanced Public Safety Action Plan

- November 2022 - DDP launched “Together We Will,” announcing an infusion of resources to address public health and public safety challenges in Downtown
  - Mobilizing the Downtown Action Team
  - Implementing public realm improvements including enhanced lighting, wayfinding and music
  - Significantly growing response teams across the cross departmental teams
VISIT DENVER Initiative

- Sponsored shared Radio program for 21 hotels located in convention corridor
- Two Additional DDP ambassadors
- Off duty police during conventions
DEN Continues As The Bright Spot

3rd Busiest in the World
4th Best recovery of Major Airports

<table>
<thead>
<tr>
<th>Rank</th>
<th>Airport</th>
<th>YTD Jan. 2023 Total Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Atlanta (ATL)</td>
<td>7,445,041</td>
</tr>
<tr>
<td>2</td>
<td>Dubai (DXB)</td>
<td>7,171,695</td>
</tr>
<tr>
<td>3</td>
<td>Delhi (DEL)</td>
<td>5,846,189</td>
</tr>
<tr>
<td>4</td>
<td>Dallas-Ft. Worth (DFW)</td>
<td>5,727,290</td>
</tr>
<tr>
<td>5</td>
<td>Istanbul (IST)</td>
<td>5,637,182</td>
</tr>
<tr>
<td>6</td>
<td>DENVER (DEN)</td>
<td>5,504,365</td>
</tr>
<tr>
<td>7</td>
<td>London/Heathrow (LHR)</td>
<td>5,488,545</td>
</tr>
<tr>
<td>8</td>
<td>Los Angeles (LAX)</td>
<td>5,455,113</td>
</tr>
<tr>
<td>9</td>
<td>Tokyo/Haneda (HND)</td>
<td>5,285,977</td>
</tr>
<tr>
<td>10</td>
<td>Paris/De Gaulle (CDG)</td>
<td>4,717,623</td>
</tr>
</tbody>
</table>

Source: ACI; Note: Totals are preliminary and subject to change
Opportunities

• Increased small to mid size meeting demand

• Great Summer demand drivers (sports, concerts, festivals, etc.)

• Excitement about center expansion

• NWC starting next phase

• Continued Business Investments in Denver

• Energy after the election
Jason Lusk
Associate Vice President, Convention Sales
Convetion Updates

- Record setting lead volume in 2023
  - Mostly small and midsize groups
  - Citywide leads rebounding

- Site visits back to near 2019 levels

- Citywides are recovering attendance

- Short-term citywide opportunities due to Dallas relocations

- Downtown environment – improving

- *New*
  - Light adventure incentive
  - MPI survey
  - Destination Analysts survey
  - Next steps
2019 vs 2023 # of Groups

Source: VISIT DENVER
2019 vs 2023 Attendance & Total Rooms

Source: VISIT DENVER
Site Visits On The Rise

Site Tours
Sales & Destination Services Q1 and Q2 Comparison

Source: VISIT DENVER
Back On Target For Conventions

Convention Booking Pace

Source: VISIT DENVER
## Group Occupancy: Q1 2019/2022/2023 Q1

<table>
<thead>
<tr>
<th>Location</th>
<th>2019 Q1 Avg</th>
<th>2022 Q1 Avg</th>
<th>2023 Q1 Avg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downtown Denver</td>
<td>22.0%</td>
<td>9.5%</td>
<td>17.0%</td>
</tr>
<tr>
<td>Denver Metro</td>
<td>17.9%</td>
<td>9.7%</td>
<td>13.3%</td>
</tr>
</tbody>
</table>

Source: VISIT DENVER CoStar, STR Data
2023 May – July CCC

- **Envestnet**  
  April 25-28; 2,000 attendees

- **City Summit of the Americas**  
  April 26-28; 3,000 attendees

- **Assn for Unmanned Vehicle Systems Intl**  
  May 8-11; 8,000 attendees

- **American Alliance of Museums**  
  May 19-22; 5,000 attendees

- **Assn for Behavior Analysis Intl**  
  May 25-29; 5,000 attendees

- **American College of Sports Medicine**  
  May 30 – June 2; 4,500 attendees

- **American Assn of Airport Executive**  
  June 3-5; 1,200 attendees

- **(e)Revolution & The Big Gear Show**  
  June 7-11; 3,000 attendees

- **American Assn of Petroleum Geologists**  
  June 13-15; 3,000 attendees

- **UnboundEd**  
  June 12-16; 2,100 attendees

- **Multidisciplinary Assn for Psychedelic Studies (MAPS)**  
  June 20-25; 7,000 attendees

- **Family, Career & Community Leaders of America**  
  July 2-6; 8,500 attendees

- **Fan Expo**  
  June 30 – July 2; 60,000 attendees  
  (regional and local)

- **School Nutrition Assn**  
  July 9-11; 6,500 attendees

- **American Veterinary Medical Assn**  
  July 14-18; 9,000 attendees

- **Cetera Financial Group**  
  July 24-27; 1,600 attendees

Nearly 80,000 attendees!
HelmsBriscoe 2023

- Hosting Annual Business Conference (ABC) for 1st time
- 500 - 550 associates
- All associates handle multiple accounts
- Large lead generator
- Denver remains in their top 20 destinations
- Opportunity to showcase CCC expansion and city
- Great opportunity for hotels to attend in your backyard!
• Reviving from successful pre-COVID program
• September 20-22, 2023
• Targeting 60-75 planners
• All in-house meeting business
• Typically short-term opportunities
• Opportunities for hotels to participate
Colorado Convention Center Expansion

Overview

- 80,000 square foot ballroom
- 35,000 square foot pre-function space
- 20,000 square foot terrace
- Completed end of 2023
Colorado Convention Center Expansion

- Remains on track
- New brochure
- New walk-through video
- Client hard hat tours increasing
- Expansion marketing campaign underway
Sports

• Solicit and attract high-profile events
• Continued consideration for future CONCACAF international soccer matches
  o May 2023 bid deadline for 2024 Copa America tournament
• NCAA announced upcoming bid cycle for host cities:
  o July 2023: Bid Portal Opens
  o Feb 2024: Bids Due from cities
  o Oct 2024: Host/sites announced
• NFL Draft
  o Invited to this year’s Draft in KC as part of “Future Cities Program”
  o Denver focused on bidding on 2026
  o Process starts fall 2023
• USA Volleyball has signed for December 2023 and May 2025
  o More coming for 2024-2026
Flavia Light
Vice President, Tourism
• Visit Denver was awarded a CTO Grant for 2023 and 2024
• Direct representation with Agencies in Canada, Mexico, UK, Germany and France
• Expand PR and Travel Trade efforts

Visits from Total international to Denver

Source: Tourism Economics
2023 Tradeshows

- Go West Summit in Anchorage, Alaska – Feb/Mar
- Mountain Travel Symposium (MTS) in Banff & Lake Louise Canada - Mar
- RMI Roundup in Boise, ID – Apr
- IPW in San Antonio, TX – May
- Brand USA Travel Week in London, UK - Oct
Tourism Update

• Neighborhood Guide Update
  o Reviewing and updating Content

• Go The Extra Mile
  o Moving to an online program by Q3

• Geofencing Marketing Test
  o Targeting convention and leisure visitors in Denver
Q1-Q2 2023 Campaigns

**Winter Basecamp**
- Play in the mountains
- Stay in the city

**OTA Co-op**
- Various hotel options with price comparisons

**Regional Events**
- Winter Basecamp
- Regional Events

**Business as Unusual**
- In Denver It’s Business as Unusual

**Denver Restaurant Week**
- Denver Restaurant Week

**Colorado Convention Center Expansion**
- Denver Convention Center Expansion
Key Results Through March

**Winter Basecamp**
- 25 million impressions
- 164k conversions to website
- 56k room nights
- $10 million in sales

**OTA Co-op**
- 1.7 million impressions
- 14k room nights
- $2.9 million in sales

**Regional Events**
- 26 million impressions
- 150k conversions to website
- 32k room nights
- $5.2 million in sales
Summer Campaign Update

Adults

• Largest campaign of the year by far – launched on Monday!

• Runs mid-April to mid-August

• Family & Adult Targets

• LGBTQ+ and Hispanic Efforts

• Maintained three largest market: New York City, Los Angeles and Chicago

• New test markets this year: Houston, Dallas, Atlanta, Seattle, Minneapolis and Austin

• Co-op opportunities are available for partners

Families
NEW! Hispanic Campaign

• Targeting the affluent Hispanic traveler

• Girls Getaway and Family Travel segments

• Working with national Hispanic market consultant

• Market shifts: more California, new markets in Florida
  • first-ever ads in this state!

• New tactics: podcast host reads

• Adjusting All Ways Welcome to be more relevant to these travelers

• Partner workshop at 9am on May 11 at Raices Brewery (replaces May 4 MAC meeting)
NEW! Hispanic Campaign

Memories are the magic of nuestra historia.

¿Listos? Let's Go!

Celebrating juntos. Living our wildest dreams together.

WISH WE WERE HERE
NEW! Diverse Content Initiative

• Key aspect of on-going efforts to promote Denver’s diversity

• Updating website content for several key groups

• Interviewing 40+ stakeholders across these segments

• Working with writers from each segment for insight and authenticity
Tiffany Eck
Associate Director, Destination Services
EIC Sustainable Event Standards

• Event Organiser Standard
• All Supplier Standards (Combined)
• Accommodation Standard
• Audio Visual and Production Standard
• Destination Standard
• Exhibition Services Standard
• Food & Beverage Standard
• Integrated Property Standard
• Venue Standard

2023 GOAL:

https://insights.eventscouncil.org/Sustainability/Sustainability-Events-Standards
VISIT DENVER Sustainability Efforts

- Denver Sustainability
- Voluntourism
- Green Vendor Directory
- Center Sustainability
- Green Denver International Airport
- Hotel Sustainability
- Event & Travel Carbon Calculator
- Get Around Without A Car
- Resources
Green Vendor Directory

Amenities
- ASTM/APEX Certified (1)
- B Corp (3)
- Certifiably Green Denver Business (24)
- Certified Organic (2)
- Colorado Environmental Leadership Program (18)
- Energy Star Rated (25)
- Green Key Certified (4)
- Green Seal Certified (15)
- Healthy Venue (5)
- ISO 14001 Certified (5)
- ISO 20121 Certified (1)
- LEED Certified (26)
- Park Smart (3)
- Trip Advisor Green Leaders (3)

Account Details

Update Amenities

Sections:
- Account Information
- Phone Information
- Address Information
- Image Gallery
- Invoices
- Social Media
- General

Related Details:
- Manage Amenities
- Manage Meeting Space
## Hotel Sustainability - Updated 2022

### COMMUNICATIONS

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Signed Environmental Policy</th>
<th>Green Team</th>
<th>Tracks Energy Consumption, Water Consumption, &amp; Waste Generation Metrics</th>
<th>Tracks Local &amp; Sustainable Food Purchases by Cost</th>
<th>Hotel Offers a Corporate Greening Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC Hotel Denver Downtown</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>hotelsDowntown</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Courtyard Denver Downtown</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Ellison Denver Downtown</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Embassy Suites Denver Downtown</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Hotel Colorado Denver</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hampton Inn &amp; Suites Denver Downtown</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hilton Denver City Center</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hilton Garden Inn Denver Downtown</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Homewood Suites Denver</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hyatt Regency Denver</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hyatt Place Denver</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hyatt Regency Hotel Denver</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hyatt House Denver</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Hyatt Place</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>K105 Hotel</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>The Larimer</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Loews Denver</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>SpringHill Suites Denver Downtown</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>The Westin Denver Downtown</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

- Communications
- 3rd Party Certifications
- Transportation
- Waste Management / Diversion
- Water Quality & Conservation
Meetings: New in 2023

• Venue Sustainability Survey
  o Capacity > 500
• Updates to Resource Page
  o CHLA
  o CRA
  o RTD
  o State Initiatives
  o Signature Airline Initiatives
Leisure: New in 2023

- Dedicated leisure page(s) for sustainability
  - Blog posts (e.g. for specific examples)
  - Articles (e.g. evergreen topics like A Line and Mall Shuttle)

- Got a good story to tell?
  press@visitdenver.com
Allison Kohn
Director, Government & Community Affairs
City Update

- Denver elections
  - Run off on June 6th – Kelly Brough and Mike Johnston, Districts 7, 8, 9, 10
  - Newly elected council

- Study underway to look at converting office buildings to housing

- Proposal to bring public transit to Red Rocks

- Waste No More update

- Downtown Denver Action Partners
State Legislative Update

• Adjourns May 6
• More than 630 bills introduced this session
• Big issues: housing/affordability, gun safety, crime
• $38.5 billion state budget
  o $18.5 million for CTO
• 2-cent-per-gallon gas fee started April 1, increasing to 3 cents in July
MC Genova
Director, Partnership and
VISIT DENVER Foundation
2023 Partnership Update

• Get Involved! Attend monthly partner networking events and workshops

• Review and Update Your Partner Listings
  o Upload Deals & Discounts
  o Update Venue Information
  o Utilize Threshold 360 (360-degree capture for hotels and venues)
  o Add public events to the Denver365 Events Calendar
  o Submit a hotel deal
  o Minority-owned & Woman-owned (through Extranet amenities tab)

• Advertise on VISIT DENVER platforms
VISIT DENVER Foundation

• Awards scholarships to college students in Colorado who are pursuing a degree in Tourism & Hospitality

• In 2023, awarded $120,000 scholarships to 38 students

• University Hospitality Programs
  o Colorado Mesa University
  o Colorado Mountain College – New this year!
  o Colorado State University
  o Metropolitan State University of Denver
  o University of Denver
  o University of Northern Colorado

• Awarded more than $1.5M to 525 students since 2000

• Thank you for your support of the Tourism Hall of Fame Dinner on March 8 at the Mission Ballroom
36th Annual VISIT DENVER Foundation Cup & Partnership Open

• A benefit for the VISIT DENVER Foundation

• Tuesday, June 6, 2023 at City Park Golf Course

• Participation Fees:
  o Foursome: $1,600
  o Individual Golfer: $450
  o Tee Box Sponsorship: $500

• Door Prizes Needed. Donate today!
Blair Neelands
Sustainability Manager
Denver Zoo
Thank You to Our Host:
Denver Zoo