

DESTINATION: FORT WORTH
A MASTER PLAN

the Next Chapter

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VISIT
FORT
WORTH



DESTINATION MASTER PLAN

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Visitors come to Fort Worth for more reasons than ever before – for conventions and meetings, sports, music, events, family fun, amazing art, filmmaking and our unique brand of western heritage.

In 2017 tourism surpassed 9 million for the first time, delivering a \$2.4 billion economic impact and supporting more than 23,000 jobs.

Fort Worth is in the tourism business.
And there is more work to be done.

“For being such a large city,
Fort Worth is so community driven.
It’s safe, it’s fun, it’s wholesome, and the
history is incredible. I learn something
new about the city all the time.”

– Master Plan Survey Response

VISIT FORT WORTH

DESTINATION MASTER PLAN

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More from the report at FortWorth.com/Masterplan

INTRODUCTION

Fort Worth has an exciting opportunity to build its tourism industry and stimulate economic development.

IMPACT OF TOURISM 2017



9.1 M
visitors



\$2.4B
economic
impact



23,000+
jobs



\$598
tax offset for average
homeowner

Fort Worth has outpaced many other destinations' visitor growth rate over the past five years. The city's evolving reputation as a sophisticated international destination that embraces its western roots has created awareness and visitation from leisure and business travelers alike.

Despite this robust growth, Fort Worth has been challenged to attract higher-spending markets. The city lacks key amenities, infrastructure and a cohesive community-wide response to its tourism opportunities.

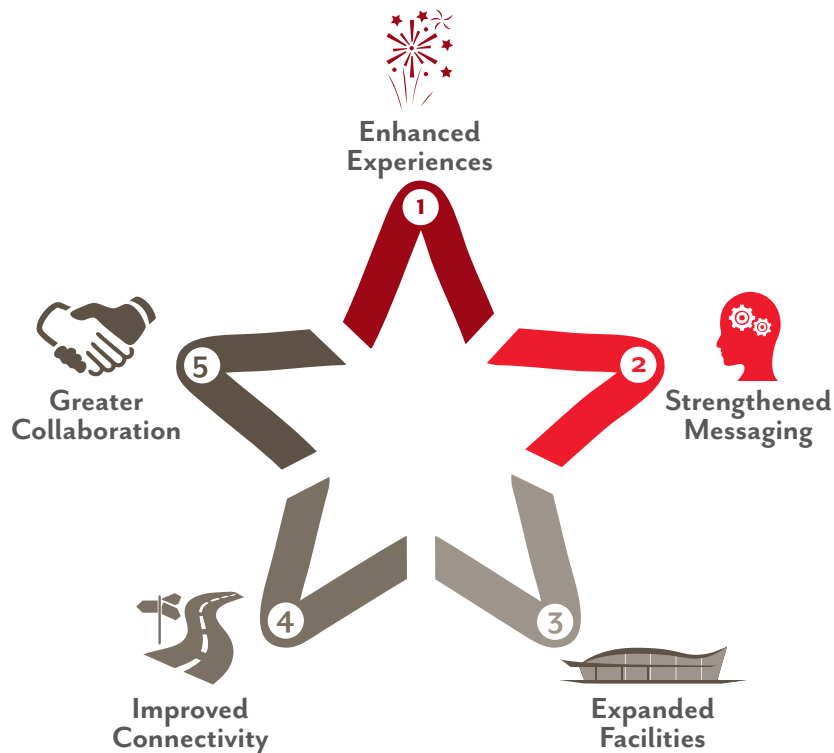
This Destination Master Plan identifies key opportunities and priorities to build Fort Worth's tourism industry and attract more visitors.

V I S I O N

MAKE FORT WORTH A MUST-VISIT DESTINATION

The destination vision must embody what the city wants to become and be known for by its citizens and visitors alike. Fort Worth's success will come through a compelling offering of experiences and places that generate demand while ensuring support from the community.

STRATEGIC GOALS



ENHANCED EXPERIENCES

Create and enhance experiences for visitors, helping people connect with things to do around the city. Packaged experiences such as food tours, passes that combine multiple organizations such as the Fort Worth Ale Trail are popular with today's travelers and help extend their stay and spending.

STRENGTHENED MESSAGING

Strengthen the message and awareness about Fort Worth. This begins by listening to customers and understanding their needs. Fort Worth has a lot to offer but is not one size fits all. Visit Fort Worth must work with its partners in economic development to ensure we are managing these messages in a coordinated fashion.

EXPANDED FACILITIES

Work together on visitor facility needs, especially convention center and headquarters hotel, which are vital welcome mats for business. Competitors are already updating and expanding facilities. Fort Worth is losing out on larger and prestigious conferences that complement the city's economic development goals.

IMPROVED CONNECTIVITY

The community is engaged in a vigorous discussion about connectivity and transportation. Fort Worth will soon complete development of commuter rail from DFW Airport to downtown, and now must rally support for the transportation master plan.

GREATER COLLABORATION

Visit Fort Worth must work more closely with its partners at the City and Chambers of Commerce on economic development strategy and enhancements to the destination.





ENHANCED EXPERIENCES

Significant capital investment has gone into developing innovative, demand-generating attractions to appeal to an ever-discerning market. Fort Worth is in a solid position to offer experiences that will attract visitors from afar, and to increase their stay in the city.

While Fort Worth has some exceptional assets, growing competition from other destinations necessitates that the city enhance support for existing experiences and expand its offerings.

- Create and promote more city-wide experiences that showcase heritage, landmarks, dining, art, architecture
- Enhance the Fort Worth Herd experience to increase visitor engagement, education, social media
- Work with Fort Worth Zoo Association leadership to explore possibility of a new iconic aquarium attraction operated by the Association.
- Promote exciting new experiences in development at Fort Worth Museum of Science and History and National Cowgirl Museum
- Create a new winter holiday experience to add to the growing list of reasons to visit Fort Worth in November-December and encourage overnight stays
- Create a Cultural District-wide event to promote art and architecture
- Advocate for development of Botanic Garden as a visitor attraction
- Develop a strategy to promote the growing culinary scene
- Create programming for Water Gardens so that more visitors experience its beauty



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STRENGTHENED
MESSAGING



STRENGTHENED MESSAGING

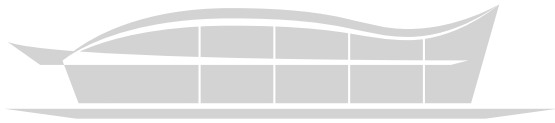
A positive and recognizable brand is crucial for destinations to successfully compete in the highly competitive sphere of attracting visitors and events. Destination marketing that authentically reflects the true nature of Fort Worth will help the city stand out from competitors. But there is no one-size-fits-all, and our communications must be tailored to our customers.

Fort Worth is not well known by those who have not been to the city, which will require a concerted effort to amend.

As with any compelling destination, Fort Worth's tourism industry recognizes it will need to collaborate with other stakeholder groups to be successful.

- Ensure collaboration of stakeholders to coordinate messaging strategies
- Encourage development of gateways to city and key visitor districts, from roadside monuments to lighting and programming Pioneer Tower at Will Rogers
- Continue enhancing thematic signage and wayfinding to promote and amplify the city and its unique districts
- Create training and increase capacity of hospitality industry to better serve visitors especially convention/group business and international guests
- Advocate for a dramatic public art installation that engages the public and promotes Fort Worth as a cultural center
- Partner with Fort Worth consumer brands to increase visibility of city
- Increase advertising of Fort Worth as a destination of choice
- Increase visibility of creative arts such as film and music to position the city as an attractive destination





EXPANDED FACILITIES

A review of infrastructure of competing destinations revealed significant shortfalls that must be addressed to realize the opportunities in the ever-changing tourism industry.

Other destinations have invested heavily in recent years and are ahead of Fort Worth in terms of convention center, headquarters hotel capacity and overall metro hotel capacity. Meeting facilities need to be expanded and modernized.

- Accelerate renovation and expansion of the Fort Worth Convention Center as quickly as financially possible
- Aggressively promote development of new headquarters hotel capacity
- Support development of full-service hotels downtown and market-supported hotel product in the Cultural District, Near Southside, Stockyards and other key visitor districts.
- Promote unique off-site venue for meetings and conventions
- Continue working with and supporting Dickies Arena in pursuit of major sports and entertainment events
- Promote development of multi-use youth and amateur sports facilities
- Encourage development of water sports and other attractions, from Gateway Park to Panther Island
- Ensure integration of visitor services and facilities into long-term Panther Island/Trinity River development





IMPROVED CONNECTIVITY

An effective visitor transportation and transit network is a key enabler for destinations. Being able to get individuals and groups easily to a city and connect them with the core elements of the place are essential ingredients to success.

Fort Worth has a strong competitive advantage over many other cities with its proximity to DFW Airport.

The new TEXRail service was viewed by many as a welcomed service for the visitor market.

Stakeholders commented that they would like to see greater options for visitors. Suggested solutions include a transit system that provides better access to points of interest, a reliable and expanded circulator system and greater use of ride-sharing and autonomous vehicles.

- Support and promote circulators as an integrated transport system and consider future opportunities for visitors and hospitality workers
- Promote exploration of emerging transportation technologies
- Promote TEXRail and Trinity Railway Express services
- Improve Wi-Fi access in key districts
- Encourage support for app-based connectivity such as Uber & Lyft





GREATER COLLABORATION

Destinations that operate with close synergy between the tourism industry, government and other sectors of the economy can achieve significantly more. Clients such as meeting planners, tour operators and visitors, are best served by destinations that pull together to provide enhanced services and experiences.

Fort Worth is blessed with smart and talented companies, agencies and organizations that directly and indirectly touch tourism and business events. Universities, strategic sectors, developers, industry operators, marketing and management agencies, all have a role to play in ensuring that Fort Worth realizes its potential through collaborative effort.

It is clear that the community is experienced at working together, and is poised to collaborate even more in the implementation of this Destination Master Plan.

- Create a workgroup with the City and Chambers of Commerce to coordinate city-wide economic development strategies
- Recruit and secure conventions and meetings that align with City, Chamber economic development goals
- Partner with universities, industry and developers to attract more conventions and events
- Pursue opportunities with Arlington to access spectator sports market (e.g. AT&T Stadium, Global Life Field/Park)
- Further integrate Alliance corridor attractions (e.g. Texas Motor Speedway, Bureau of Engraving & Printing, Tanger Outlets) with the visitor experience
- Integrate and promote unique venues for meetings, conventions
- Advocate for creation of a sports authority to promote events
- Evaluate means to integrate a broad network of organizations involved in destination marketing and management through strategic alignment of plans, resources and structure

“Fort Worth has its own personality. It feels more ‘Texas’ than just about any town in the state.”

– Master Plan Survey Response

WHY A DESTINATION MASTER PLAN?

Tourism, conventions and events can be a **powerful force in helping shape communities** into diverse, vibrant and thriving places. Yet for destinations to succeed, they must be carefully planned for the benefit of residents, businesses and visitors alike.

This requires the **strategic alignment** and ongoing engagement among industry, community and marketplace stakeholders for the destination brand and experience to flourish.

This Destination Master Plan is a **10-year roadmap** for Fort Worth to articulate the experiences it wants to develop and enhance for visitors and influencers, including meetings, events and other groups.

Recognizing that the community has other planning initiatives underway, the Fort Worth Destination Master Plan is designed to complement and not duplicate these efforts. Essentially this plan is meant to provide **a tourism lens to how Fort Worth evolves** as a city and community.

Through extensive consultations with stakeholders and customers, the plan has come together in a way to provide a broad and varied perspective while zeroing in on those actions that will most benefit Fort Worth as a place to visit and hold events.

KEY OBSERVATIONS

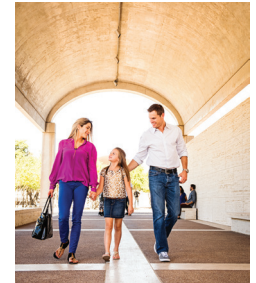


Fort Worth is starting with a strong base of assets.

Destination assets such as the Stockyards National Historic District, Sundance Square, the Cultural District and Texas Motor Speedway can help catapult Fort Worth to the next level of recognition and visitation.

Fort Worth's urban and cultural sophistication is gaining international prominence.

Growth of international visitation will help drive higher rates of spending and longer stays and help to overcome outdated perceptions.

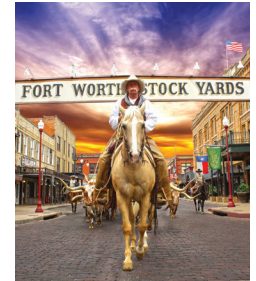


Major developments are transforming the city.

Developments such as Panther Island will significantly reshape Fort Worth through the densification of residential living, business and services such as hotels.

Fort Worth's uniqueness emanates from its Western roots.

Fort Worth should build on the foundation of its Western values but update its meaning to reflect evolving community and marketplace values.



Fort Worth needs to strengthen awareness.

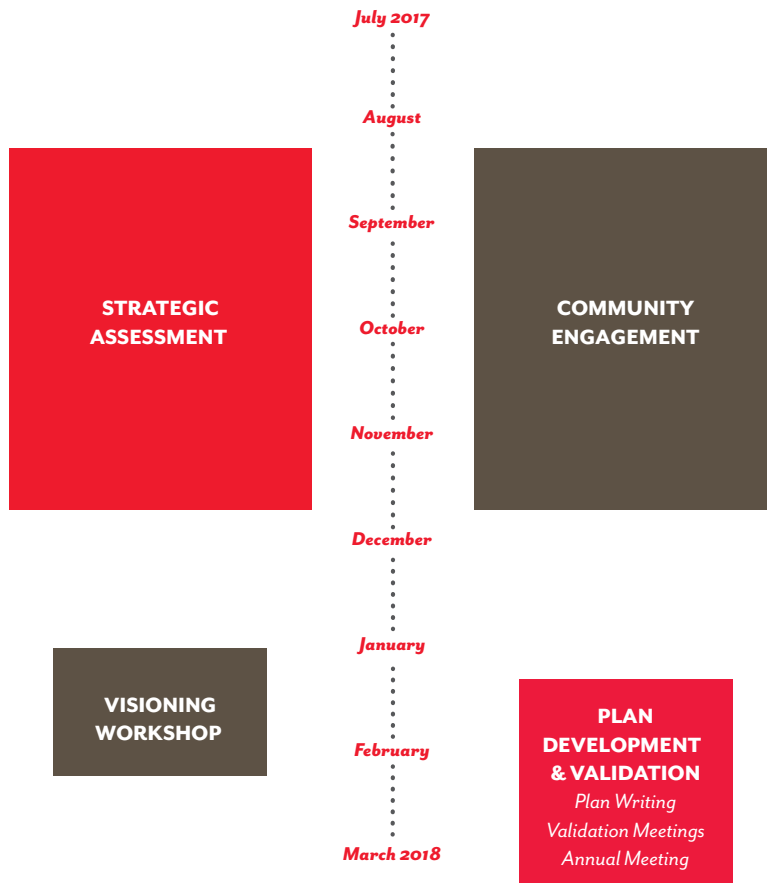
Despite unique attributes, Fort Worth lacks awareness. Addressing this issue will require a cohesive effort of positioning the city as a place to be for living, investing, working and visiting.

Convention center modernization and hotel expansion are drastically needed.

Expansion of the Fort Worth Convention Center and addition of a 1,000+ room headquarters hotel is vital to just keep pace with the competition.



FORT WORTH DESTINATION MASTER PLAN TIMELINE



COMMUNITY ENGAGEMENT

Fort Worth's Destination Master Plan is a 10-year roadmap that includes a vision, goals and strategic initiatives. It is an ongoing engagement platform that will be used by the tourism industry to come together and fulfill their vision for Fort Worth.

This plan has been developed based on extensive analysis and community engagement, including:

STRATEGIC ASSESSMENT



Reviewed 1,000+ Pages of Documents and Data Summaries



DestinationNEXT Online Diagnostic Review



National & International Trend Analysis



Consumer Research

COMMUNITY ENGAGEMENT



11 Focus Groups



30+ One-on-One Interviews



Leisure and Meeting Advisory Board Discussions



40+ Meeting Planners Surveyed



2,000+ Public Sentiment Survey Responses

VISITOR PROFILE

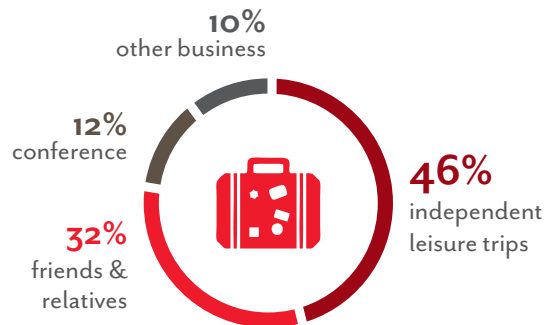
In 2017 Fort Worth welcomed a total of 9.1 million visitors, evenly split between overnight and day visitors hosted by the city last year. This total annual visitation level in 2017 set another record for Fort Worth, representing a 3.6% increase over 2016 levels. Fort Worth continues to **significantly outpace the U.S. average for growth in overnight visitation**, experiencing a 4.93% compound average growth rate over the last 5 years in comparison to 1.63% growth rates nationally.



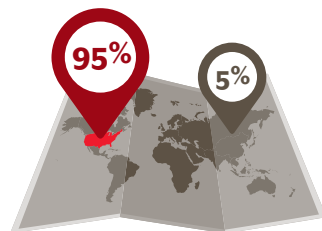
49.9%
day visitors



50.1%
overnight visitors



About 95% of visitors to Fort Worth are domestic travelers, with the remaining 5% originating from overseas markets such as Canada, Australia, the UK and Germany. International visitors account for about 15% of all tourism spending in Fort Worth. Of domestic markets, Texans make up the largest share of Fort Worth's visitors (42%), with notable visitation also from the Southeast, Plains and Northeast regions of the U.S. (15%, 9% and 9% respectively).



Fort Worth's overnight visitors stay approximately 2.9 nights on average in the city, below the current average of 3.7 nights spent by overnight visitors in U.S. destinations generally. **Daily visitor spending also falls below national averages**, with Fort Worth visitors averaging \$216 per person per day in the City, versus the U.S. destination average of \$249 per person per day.

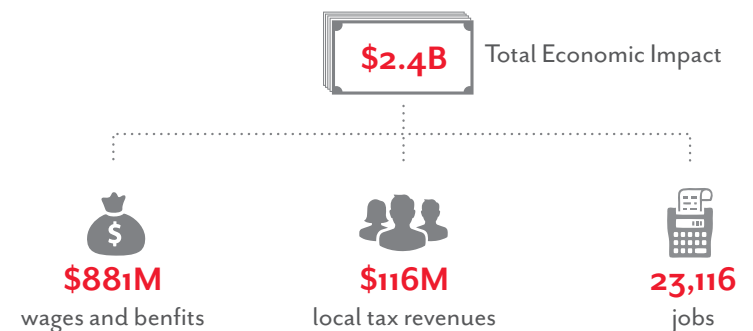


2.9 nights
for overnight visitors



\$216
daily visitor spend

Total direct visitor spending in Fort Worth amounted to \$2 billion in 2017, a 4.1% growth over the \$1.9 billion visitor spend figure in 2016. This spending level generated \$2.4 billion in total economic impact for Fort Worth in 2017, including indirect impacts. Tourism in Fort Worth produced \$431 million in tax revenues, including \$216 million in state and local tax revenues. Additionally, **23,000+ jobs were sustained by visitors** to Fort Worth in 2017, representing more than 5% of all jobs in Fort Worth, and accounting for more than \$881 million in staff salaries and benefits.



PROJECT TEAM

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“This unique mix along with the friendly people draw people back as they most often find the real Fort Worth exceeds their expectations.”

– Master Plan Survey Response



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