VISIT FORT WORTH

ANNUAL REPORT
FISCAL YEAR 2020

MARKETING | SPORTS COMMISSION | THE HERD | MEETING SALES & SERVICES | FILM COMMISSION

TOURISM RECOVERY OVERVIEW

Overall, hotel occupancy (and tourism) were at their lowest points mid-March-May before beginning a slow recovery in June that continues to today. Occupancy bottomed out in the low 20% range and is now averaging in the mid 40% range. In 2019, Fort Worth hotel occoupancy typically averaged 69% with frequent peaks in the high 70% range with sports, festivals and meetings.

Without any measurable business travel, the recovery is built on weekend leisure travel with spikes from sports events. This began in June as our attractions re-opened and with the Charles Schwab Challenge, and peaked with National Finals Rodeo in December. There are significant sports events throughout the spring.

During the recovery, June-December, transient hotel bookings (mostly for leisure and sports) was down only 16% for the year, with a big boost from National Finals Rodeo in December. Group travel, however, usually reflecting meetings and conventions, was down 70% for the year. Group business travel would have been down much lower without a strong start to the year before COVID-19.

THE WAY FORWARD

Visit Fort Worth is committed to rebuilding our hospitality industry, devastated by COVID-19, in ways that benefit the community more than ever before.

Our immediate response to the crisis last year comprised three parts:

- **Communicate with customers and community partners.**
- **Provide and support public health messaging.**
- **Promote travel and book sports events when circumstances allowed.**

Tourism's recovery is essential to our local economy because the industry supports jobs and small business, and offsets City property tax dependence through hotel and sales tax revenue.

Tourism has started to recover on the strength of weekend leisure visitors and a strong schedule of sports events.

Weekenders are drawn by the renovated Stockyards, museums, Botanic Garden and our No. 1-rated Fort Worth Zoo. In Sports, we booked major events this winter and spring in gymnastics, basketball, fencing, the landmark Bassmaster fishing event and the NASCAR All-Star Race.

Visit Fort Worth is also focused on the long-term way forward. Our Destination Master Plan calls for investment and focus on areas that enhance our appeal in a post-COVID world: places to convene, people who create and powerful moments where memories are made.

I am proud to lead a dedicated team that is engaging the community and working hard to rebuild our visitor economy.

You are invited to contact me anytime with your questions and suggestions.

Sincerely,

Bob

BOB JAMESON
President & CEO
AskBob@FortWorth.com

KEEP OUR MOMENTUM

We have also brought more attention to the creative community so that artists, musicians and filmmakers know we value their work. The Fort Worth Film Commission and Hear Fort Worth music association are providing much-needed support in these areas.

During my 10 years as your mayor, I have been privileged to represent Fort Worth around the country and the world. Visit Fort Worth has been a great partner along the way, increasing tourism from near and far over the past decade.

Our hard work at home to make Fort Worth a better place to live has increased our appeal as a place to visit.

This includes a litany of visionary investments, some of them through public-private partnerships in recent years: Dickies Arena, Sundance Square Plaza, TEXRail connecting downtown with DFW Airport, renovation of the Stockyards and Mule Alley, enhanced exhibits at the Fort Worth Zoo, Botanic Garden merger with BRIT, improvements at Will Rogers Memorial Center, expansion of cultural attractions, most notably the Kimbell Art Museum.

Visit Fort Worth has supported these efforts by promoting them to visitors. And the new Fort Worth Sports Commission is helping to bring incredible tournaments and events to our state-of-the-art facilities.

Let's keep our momentum going. When you have a great city like ours, you want to invite the world to experience it. That's what visitors are all about.

Thank you for always caring to make our city better than ever. After all, it is your Fort Worth.

BETSY PRICE
Mayor, City of Fort Worth

THE WAY FORWARD

RECOMMENDATIONS FOR FUTURE GROWTH

Tourism is a pillar of our economy. **Visitor spending creates jobs and supports local business. And visitors share our story around the world.**

While COVID-19 paused our progress, we will find the way forward, together and safely.

Hotels, restaurants and cultural attractions are the backbone of the hospitality industry. The following are also essential not only to restoring the visitor economy but also to advancing our city.

Promote Fort Worth through Meetings

When business travel resumes, Fort Worth must double down on convening people on important topics related to our top industries. Let's make our city a destination of choice for business in mobility, logistics and medicine. Plans for innovation districts, Texas A&M School of Law downtown campus and the Fort Worth Convention Center point the way.

Invest in Youth Sports

Fort Worth needs a youth sports facility to provide access to exercise and team activities for our children. It's worth millions of dollars a year in economic impact and priceless investment in the well-being of our kids. Youth who have access to sports are more likely to have higher self-esteem, academic performance and personal success. Fort Worth families export tens of millions of dollars each year when our residents travel to other cities to play. Plans call for a 97-acre facility but we need community commitment to secure funding. Read more in Fort Worth Sports.

Support Music Resilience

People who create are among the most vulnerable during COVID-19, threatening our progress as a music-friendly city. Visit Fort Worth and Hear Fort Worth are releasing a new study by London-based Sound Diplomacy that provides the first comprehensive snapshot of the local music industry, including jobs and economic impact. Recommendations growth the industry range from simple policy enhancements to funding an exciting new public venue. Read more in the executive summary here.

Collaborate for Business

Visit Fort Worth and the Fort Worth Chamber of Commerce have signed a historic Memorandum of Understanding that commits to double down on their collaboration during the economic recovery and beyond: Sharing marketing and research resources, building support for sports tourism and elevating priority industries by attracting future meetings and conventions.

Celebrate the Heart of the City

The year-long pause in business travel and conventions has set back our beloved Downtown. When it is safe to travel again, we must fully support the rejuvenation of downtown and celebration of Sundance Square.

Expand Community-based Tourism

Hospitality means all are welcome in Fort Worth, and tourism draws strength from working with the entire community. In 2020 we launched Discover Diverse Fort Worth and other marketing initiatives with the Fort Worth Metropolitan Black Chamber of Commerce and the Fort Worth Hispanic Chamber of Commerce. Going forward, we will do even more to engage locals in sharing the Fort Worth story.

Invest in Spaces to Create

The Near Southside is a hub for creativity in Fort Worth. This newly established cultural district's concept for a Creative Incubator would include artist residences and studio spaces that would be a major boon for the entire community. The project is evaluating three locations for the concept with assistance from ArtSpace. Nearby, Fire Station Park master plan fundraising has reached two-thirds of its $1.5 million goal for a central green and outdoor stage that would provide a much-needed public performance venue.

MARKETING

PUBLIC RELATIONS

503 stories placed,

delivering 623,254,007 media impressions

CULINARY PR HIGHLIGHTS

- Derrick Walker of Smoke-a-Holics BBQ Feature Stories: Garden & Gun's October/November issue, The Manual, Matador Network and more.
- Reata in The Wall Street Journal
- Female Chef Spotlights: James Beard Award-nominated Bria Downey on Unearth Women and Ellerbe Fine Foods' Molly McCook on ZAGAT
- Whiskey Ranch's Hand Sanitizer: Robb Report, Fodor's and Parade.
- Chef Lanny Lancarte – Travel & Leisure, Food & Wine

DESTINATION PR HIGHLIGHTS

- Hotel Dryce – Black Enterprise, Connect Meetings, Luxury Travel Magazine, Forbes, Black Chronicle
- McFly's Pub – Food & Wine, Travel + Leisure
- Ms. Opal Lee / Juneteenth – ET Online, Deadline
- Circle L 5 Riding Club – ABC, Yahoo, MSN, Black Enterprise
- Rahr & Sons – Porchdrinking.com
- Hotel Drover – Forbes, Luxury Travel Magazine, Business Insider, Connect Meetings, BizBash, Smart Meetings
- National Cowgirl Museum - Forbes
- Billy Bob's Texas – Travel Pulse
- Charles Schwab Challenge – Forbes
- Whiskey Ranch – Robb Report, Town & Country, Martha Stewart, Yahoo
- Best Maid Pickles – Southern Living
- Chef Marcus Paslay – Forbes
- Chef Molly McCook – Zagat
- Kimbell Art Museum– Smithsonian, The Washington Post, CBS News
- Texas Motor Speedway Gift of Lights – Fodor's

LANDED FORT WORTH IN 16 DREAM PUBLICATIONS, INCLUDING:

The New York Times

THE WALL STREET JOURNAL

BLACK ENTERPRISE

FOOD & WINE

Southern Living

ADVERTISING

VISIT FORT WORTH CAMPAIGNS DURING 2020:

Y'all Stay Home
Y'all Wear a Mask
Y'all Get Ready
Virtual Experiences
Now Open
Modern West

The Modern West ad campaign attracted visitors during the summer recovery.

$60,000: Online campaign flight June-Sept

$1,700,000: Total spending by visitors who saw the campaign

$28:$1: Return on advertising investment

Y'ALL WEAR A MASK.
IT'S REQUIRED

Visit Fort Worth created the campaign **Y'all Wear a Mask**, which many local businesses posted to promote mask-wearing.

SOCIAL MEDIA HIGHLIGHTS

MODERN WEST SUMMER ROAD TRIPS CAMPAIGN

- 65,574 link clicks – #1 social campaign
- 2.4 million Impressions
- Top Markets: Waco, Tyler, DFW region, Oklahoma City, Odessa

MODERN WEST NOW OPEN CAMPAIGN

- 47,295 link clicks
- 56,133 total engagements
- Top Markets: DFW, Houston, Austin, San Antonio

FORTWORTH.COM

Restaurant listings on FortWorth.com helped drive business to local restaurants offering take-out and delivery.

- **Total unique web visitors: 1,631,333**
- **Restaurant Web Hits: 42,979**
- **Total restaurant listings: 343**
- **Black-owned business listings: 81**
- **Coronavirus information pages: 129,872 Users (8.36% of overall web traffic)**
- **Unique blog readers: 247,832 (15.95% of overall web traffic)**

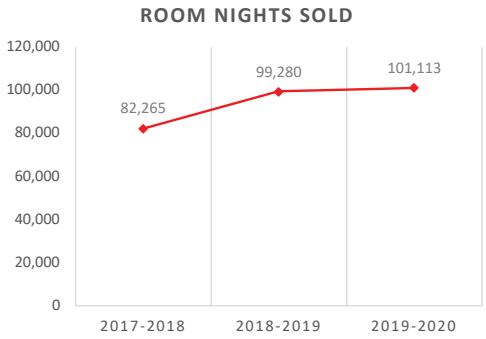
SPORTS COMMISSION

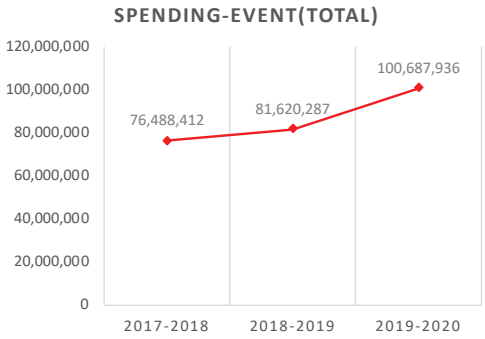
Booking Record Business

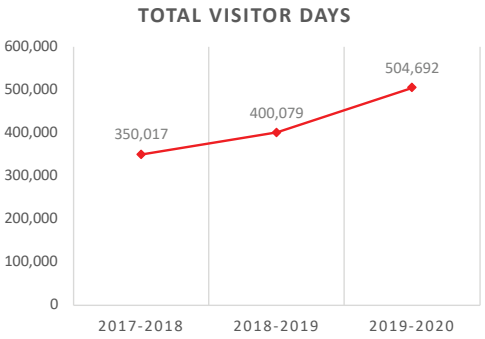
The Fort Worth Sports team set records for events booked during FY 2020 for current and future years. Anticipated room nights surpassed 100,000, economic impact exceeded $100,000,000 and the number of total visitor days topped the 500,000 mark. The increased business reflects:

- Return On Investment: $1:$235. For every dollar Visit Fort Worth invested in sports, the City realized $235 in Estimated Economic Impact.
- National Exposure: Sports brings national and international exposure to Fort Worth with events televised on ESPN, NBC, ABC, FOX and CBS and other media.
- Recession- and Pandemic-Resistant. Fort Worth playing a leading role in bringing back competition and tournaments.

YEAR OVER YEAR GROWTH







Big-Impact Events

Events booked for current and future years demonstrate Fort Worth's ability to capture a wide variety of youth and amateur sports:

Impact of recent and upcoming events booked for FY21

Estimated Hotel Room Nights: 97,266

Estimated Economic Impact: $80,729,145

Visitor Days in Market: 602,218

National Finals Rodeo

UIL High School Spirit Championships

American Cheerleader Association

Metroplex Challenge Gymnastics

AAC Men's and Women's Basketball Championships

USA Fencing North American Cup

NCAA Women's Gymnastics Championships

USA Gymnastics U.S. Championships

Bassmaster Classic

YOUTH SPORTS COMPLEX

Now is the time to prioritize a youth sports complex with immediate impact on our economy and the health and wellness of our children.

A Fort Worth Sports study says that without such a facility the community loses millions of dollars each year to other surrounding cities.

Fort Worth kids lag behind their neighbors in Frisco, which has a robust youth soccer complex. In Frisco, 15% of the 49,000 children ages 5-18 play soccer compared to just 5% of Fort Worth children in the same age group.

Youth soccer complex benefits:

- $161 million in new direct spending over 10 years
- 650,000 annual visits
- 37,465+ annual hotel room nights
- 122,000 visitor days in market

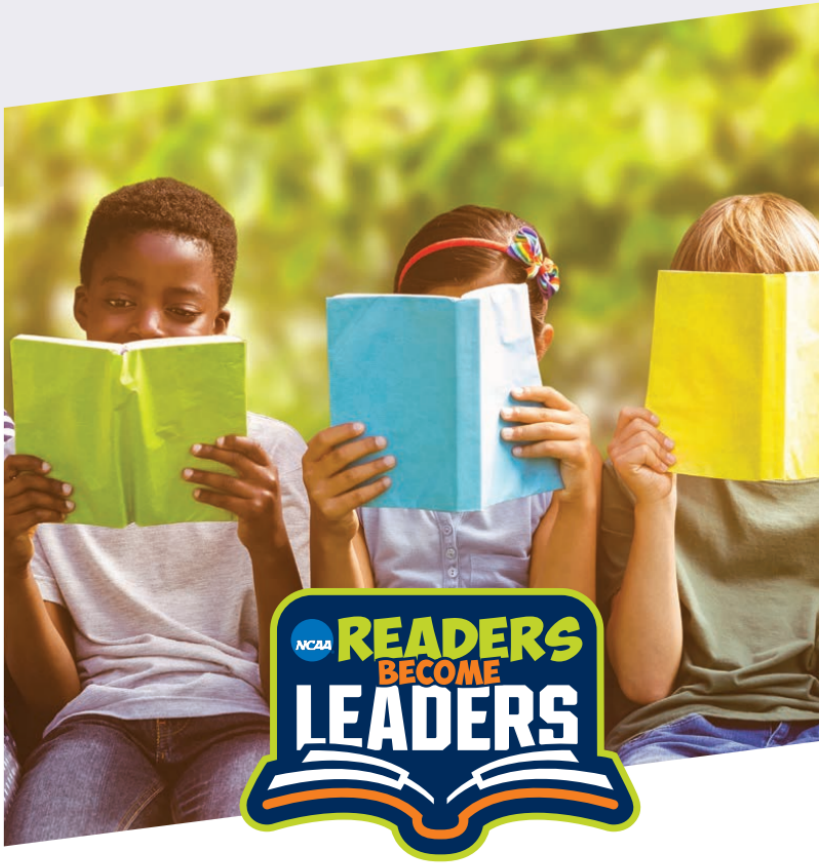
Benefits for kids participating in sports:

- 40% higher test scores
- 15% more likely to go to college
- 10% less likely to be obese

The proposed 100-acre development would immediately return on the $50,000,000 investment by reversing the trend where Fort Worth families drive to other cities for youth sports events.

FIFA World Cup is coming in 2026 and we need to embrace it with a robust soccer community and a strong pipeline of involved kids.

- 7% higher annual earnings
- Lower health care costs as adults
- Twice as likely to pass healthy habits to their children



Community Impact

The Fort Worth Sports Commission is dedicated to leveraging events and relationships for positive, long-lasting impact for our community.

The No. 1 example: The Readers Become Leaders program implemented at Fort Worth ISD elementary schools in partnership with the NCAA alongside the NCAA Women's Gymnastics Championship hosted each year in Fort Worth.

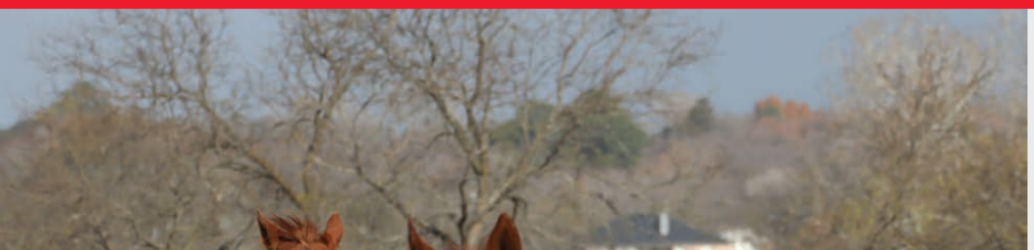
In 2019, more than 17,000 FWISD kids read 6.7 million minutes – making this the single biggest community outreach program in NCAA history. **In 2020, the program expanded to more than 24,000 FWISD students reading more than 7.1 million minutes** before the pandemic hit and schools went virtual.

The Fort Worth Sports Commission developed another partnership with the FWISD and APEC Training to give middle school athletes access to the APEC high- performance training platform, the same workouts that professional athletes from the NFL, MLB, MLS and more receive from APEC's team of trainers.

These virtual workouts are available online so students can access them and participate from home as well as at school with the support of coaches and athletic directors who have adopted the program.

Students have lifted more than 32,000 pounds, ran more than 143 miles and burned more than 121,000 calories, according to the program's tracking.

THE HERD

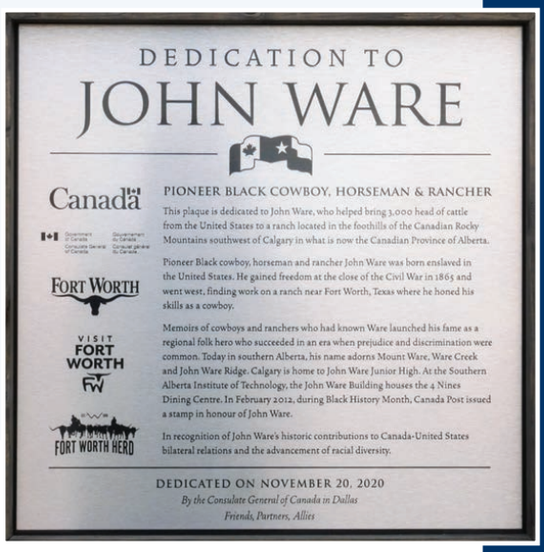


Enrichment Rotation Program

For the first few months of COVID-19, the Fort Worth Herd suspended its twice-daily cattle drives for the first time in its history. This gave the organization the opportunity to rotate its longhorns and horses to pastures for time in the fields. The Herd is working with nine ranches in the region. Three times as many ranchers offered their property, showing tremendous support. Although the cattle drive has resumed in the Stockyards, the program continues the rotation and enrichment program.

NEW HERD EXPERIENCE

Before resuming the traditional twice-daily cattle drive, the Fort Worth Herd created the Herd Experience to provide an education program with social distancing. During the timed program, drovers demonstrate roping, branding and working with longhorns. The program, which takes place at the Observation Deck near the Cowtown Cattlepen Maze, is offered now Fridays through Sunday.



Canada Honors a Cowboy

The Consulate General of Canada in Texas and the Fort Worth Herd partnered to honor the life and legacy of famed Canadian cowboy John Ware with a plaque in the Stockyards. **Pioneer Black cowboy, horseman and rancher John Ware helped bring 3,000 head of cattle from the United States to a ranch located in the foothills of the Canadian Rocky Mountains southwest of Calgary.** Memoirs of cowboys and ranchers who had known Ware launched his fame as a regional folk hero who succeeded in an era when prejudice and discrimination were common. The commemoration was championed by Dr. Rachel McCormick, Consul General of Canada, in partnership with the Fort Worth Herd.

MEETING SALES & SERVICES

RESCHEDULING CONVENTION BUSINESS

In response to the coronavirus crisis, **the Meeting Sales and Services team rebooked 59 conventions worth 33,220 contracted hotel room nights that had to move dates in light of COVID-19.** Keeping this business for Fort Worth has required working closely with customers. Available dates for events in future years has become competitive. COVID-19 froze business travel across the United States and the world. Nationally, spending on business travel sank 70% in 2020 over 2019 while leisure travel was down 27%, according to the U.S. Travel Association.

	City-Wide >1,100 Peak		Conventions >1,100 Peak		Totals	
Calendar Year	Definite	Pending	Definite	Pending	Definite	Pending
2019	9		51		60	
2020	4		15		19	
2021	7	1	15	1	22	1
2022	10	1	31	10	41	11
2023	4	1	14	11	15	12
2024	6	1	10	15	16	16

New Strategies for Business Meetings

Here are some of the strategies Visit Fort Worth has embraced to sell conventions and other business meetings for future years:

- Shift towards smaller meetings
- Focus on events in single hotels
- Virtual visits by meeting planners shopping for locations
- Virtual events for meeting planners to engage them in Fort Worth, such as the webinar Women Worth Meeting produced for the Professional Convention Management Association
- Source meetings with local connections, such as Fort Worth executives who serve on association boards
- Target more conventions in specialized markets such as faith-based meetings and industries with strong local connections
- Hone sales efforts for conventions with a Hispanic or African-American focus

EVENT FACILITIES OBTAIN GBAC CERTIFICATION

The Fort Worth Convention Center and the Will Rogers Memorial Center received the "STAR" Facility accreditation status from the global Biorisk Advisory Council® (GBAC),

the cleaning industry's only outbreak prevention, response and recovery accreditation for facilities.

GBAC accreditation means that a facility has:

- Established and maintained a cleaning, disinfection, and infectious disease prevention program to minimize risks associated with infectious agents like the novel coronavirus.
- The proper cleaning protocols, disinfection techniques, and work practices in place to combat biohazards and infectious disease.
- Highly informed cleaning professionals who are trained for outbreak and infectious disease preparation and response.

As part of the requirement for accreditation, 18 Public Events Department employees also received a GBAC Trained-Technician certification. Individuals earning the certification are trained in planning, knowledge and processes needed to respond to a biohazard crisis in the workplace. They also mastered preventive, response and contamination control measures for infectious disease outbreak situations such as COVID-19.

FILM COMMISSION

FEATURE PROJECT HIGHLIGHTS

The Fort Worth Film Commission assisted 81 projects in FY 2020, including:

- **Musician Orville Peck's "Queen of the Rodeo"**
- ***12 Mighty Orphans* directed by Ty Roberts**
- ***The Green Knight* directed by David Lowery**
- **Paramount's *Yellowstone***

Miss Juneteenth

Writer and Director Channing Godfrey People's *Miss Juneteenth* released June 19, 2020 and **has been nominated for more than a dozen awards including Sundance Film Festival Grand Jury Prize,** Gotham Independent Film Awards and many more. *Miss Juneteenth* received four Independent Spirit Award Nominations and Peoples was awarded Best Directorial Debut by the National Board of Review.

12 Mighty Orphans

The feature film *12 Mighty Orphans* about a Fort Worth 1930s underdog football team wrapped production here in November 2020. In January, Sony Pictures Classics picked up the film for international distribution. The film **employed hundreds of locals, used local hotels and businesses** and filmed throughout the greater Fort Worth area.

Lone Star Film Festival

The Fort Worth Film Commission took a larger role in supporting the Lone Star Film Festival when the pandemic cancelled the in-person event. The Commission took on marketing, public relations and virtual panel discussions. Content included a new co-branded logo, eight produced panels, custom animations, advertising and placement of stories in several local and regional publications highlighting the festival. The Fort Worth Film Commission will continue to support the festival with marketing and public relations efforts year-round.