

HOUSTON FIRST OVERVIEW AND TOURISM STUDY FINDINGS



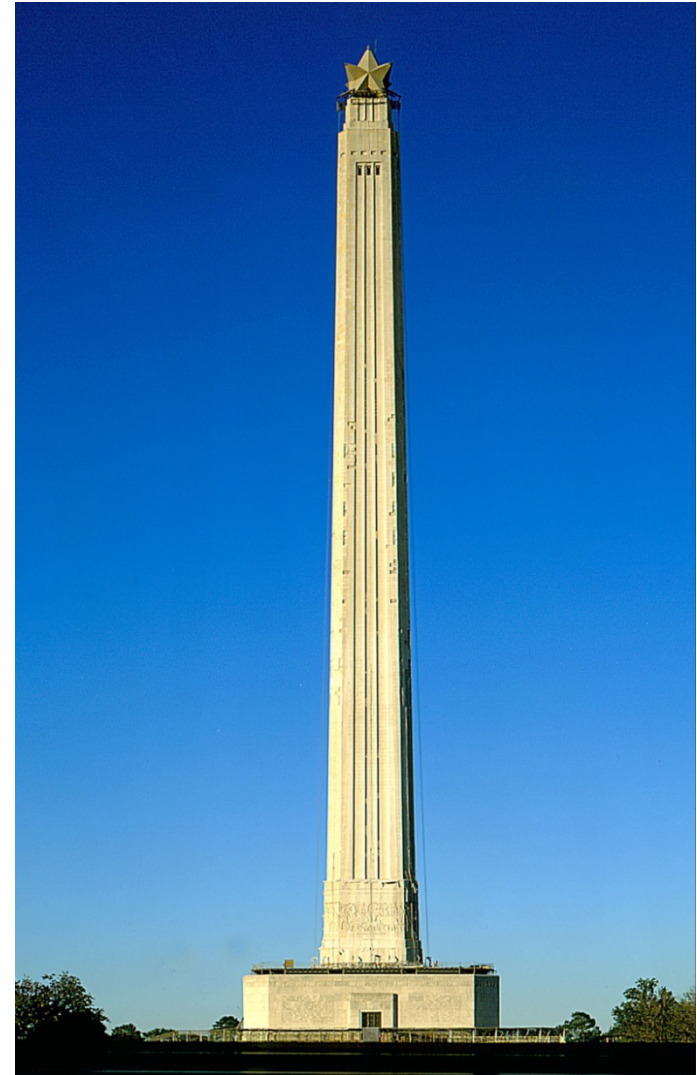
JORGE FRANZ

Senior Vice President of Tourism
Houston First Corporation
Greater Houston CVB

HOUSTON
VisitHouston.com

BACKGROUND

- We retained Parter International to Conduct Tourism Study
 - Stakeholder Input
 - Toured Attractions
 - Used Infrastructure
 - Joint Tourism Committee
 - Study Comparables
 - ✓ San Antonio
 - ✓ New Orleans
 - ✓ Los Angeles
 - ✓ Chicago
 - ✓ Atlanta
 - ✓ Philadelphia
- Econsult Solutions Prepares Tourism Economic Impact Study



HOUSTON

CONCLUSIONS – POSITIVE FINDINGS

Strong Base to Build Upon Time is Right for Increased Commitment

- Significant Number, Variety, and Quality Attractions
- Abundant Shopping/Dining
- Strong Airport Service
- Expanding Cruise Market
- Growth in Overseas Visitors
- Visitor Spending is High
- Enhanced Quality of Life Improvements (i.e. – Buffalo Bayou, Discovery Green, etc.)



HOUSTON

CONCLUSIONS – ROOM FOR IMPROVEMENT



- Total Number of Visitors is Low
- Transportation & Signage are Issues
- Partnerships are Rare
- Hospitality Industry Not Fully Engaged in Leisure Promotion
- Limited Regional Cooperation
- Need “Visitor Domains”
- Lacks Iconic & Compelling Attraction
- Better Located Visitors’ Center
- Attractions Focused on Local Promotion
- Small Staff for Tourism Promotion

WHERE ARE WE TODAY?

- Total Number of Visitors to Houston Metropolitan Statistical Area (MSA) is 14.8 Million
- Total Economic Impact is \$16 Billion
- Tourism Employs 129,000 People in Houston MSA
- Tourism Generates \$1.1 Billion in Local & State Tax Revenue
- Tourism Ranks 10th in Industry Contribution to Houston's GDP
- In 2014, Houston had the Highest Growth of International Travel to the United States out of the top 10 cities in the USA
- Mexico is our Largest International Market, with China Growing Quickly
- Most Leisure Visitors Come from Within Texas
- Favorite Activities are:
 - Visiting Friends and Family
 - Dining
 - Shopping
 - Visiting Cultural Attractions

HOUSTON

PERSPECTIVE

- New York Attracts 54 Million Visitors a Year; Chicago 42 Million; and San Antonio attracts 31 million!
- With its Increase in Leisure Tourism, Philadelphia's Hotels have a Higher Occupancy Rates on Weekends Than During the Week
- Our Visitors are Mostly from Greater Houston Area
- Tourism Promotion is on the Increase Everywhere



HOUSTON

SO MUCH TO DO

Family

- **The Kemah Boardwalk-** More than 3 Million Visitors
- **Space Center Houston** 850,000 Visitors. New Exhibit to Open this Summer.
- **Downtown Aquarium-** More than 1 Million Visitors
- **Houston Zoo – Winner** - 2014 Traveler's Choice Award for Attractions on Tripadvisor.com

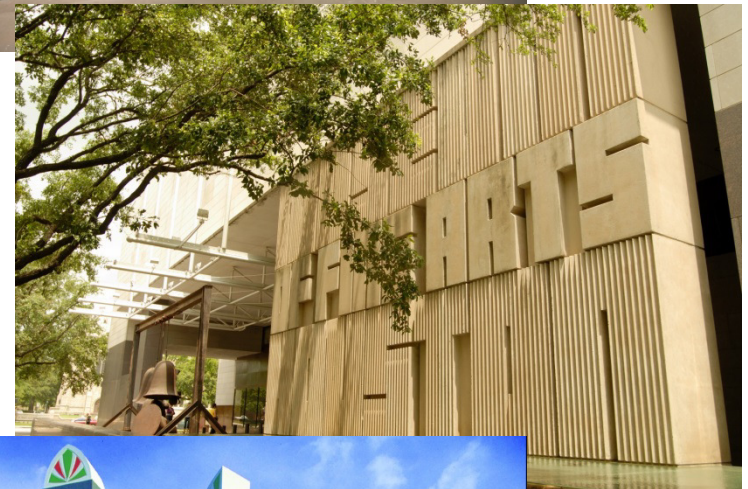


HOUSTON

SO MUCH TO DO

Museums

- **Museum of Natural Science**- #1 Most Popular Activity in Houston on Tripadvisor.com
- **Children's Museum of Houston** - Rated #1 Children's Museum in America by Parents Magazine
- **Museum of Fine Arts Houston** - Largest and Most Diverse Art Collection in the Southwestern US
- **Menil Collection** - World Renowned Collection
- **Funeral History Museum**
- **Buffalo Soldiers National Museum**



HOUSTON

SO MUCH TO DO

Events

- **Houston Livestock Show & Rodeo –**
Attracted 2.5 million
- **Art Car Parade**
- **Houston Marathon**
- **WorldFest Film Festival**
- **Renaissance Festival**
- **Mardi Gras**

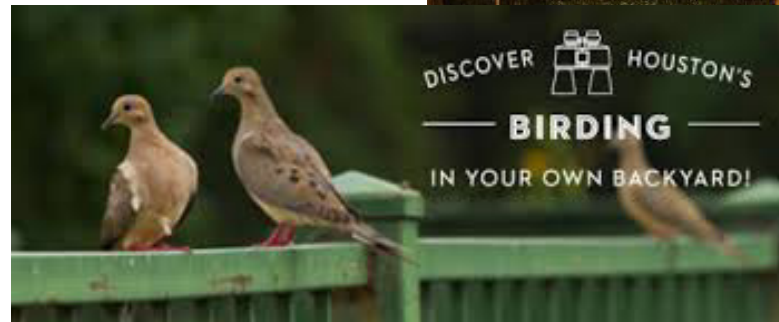


HOUSTON

SO MUCH TO DO

Regional

- **George Ranch**
- **Beach**
- **Birding**
- **Wineries**
- **Historical Sites**



HOUSTON

AND SO MUCH MORE

- **Theater**
- **Symphony/Ballet/Opera**
- **Shopping** -The Galleria Drew 30 Million Customers Last Year of Which 25% Were Tourists
- **Sports**
- **Night Life**
- **Buffalo Bayou Park**
- **Religious Sites**
- **Medical Tourism**
- **Educational Institutions**



HOUSTON

OUR GOALS:

Increase the Number of Visitors to Houston from 14.8 Million in 2014 to 20 Million by 2018

- Increase Local and State Tax Revenue from Tourism by 25%
- Increase the Number of Hospitality Sector Jobs by 15%
- Enhance the Quality of Life for Houston's Residents
- Improve Houston's Image
- Bolster Civic Pride in Houston
- Attract More Talent to Houston

HOUSTON

THE TIME IS NOW TO:

- Recognize and Expand Tourism's Role in the Economy
- Increase Our Investment in Tourism
- Take Advantage of Recent HFC/CVB Alignment
- Educate and Excite Our Residents About Tourism
- Use the Tourism Study as a Blueprint – We Create the Plan
- Increase Promotion of the Region as a Tourism Destination

OUR PLAN IS IN PLACE AND WE HAVE BEGUN TO:

1. Inform and Educate Key Stakeholders About Renewed Tourism Effort - National Tourism Week
2. Plan and Implement Tourism Summit Scheduled for September 10, 2015
3. Develop Initial Matching Grants Program to Leverage Marketing Resources and Create Partnerships
4. Work with Existing Events to Promote Leisure Visitors
5. Increase Marketing Spending to Attract More Visitors
6. Work with Online Travel Agencies, Wholesalers and Other 3rd Party Companies to Increase Leisure Visitors
7. Launch a Regional Campaign
8. Launch Houston's First Advertising Campaign in the Mexico Market
9. Create a Prototype Satellite Visitors' Center
10. Begin the Work of Attracting a Major Attraction to Houston

HOUSTON

WHAT WE ALL NEED TO DO:

Be an Active Tourism Booster

- Participate in the Tourism Summit on September 10th
- Visit a New Attraction
- Visit www.VisitHouston.com and all of our websites
- Discuss Tourism Value to the Region's Economy

Increase Word-of-Mouth Tourism Promotion

- Talk Enthusiastically About the Region's Tourism Attractions (Spread the Word)
- Encourage Friends and Family to Visit
- Include Tourism Assets as an Integral Part of the Region's Civic Pride

HOUSTON

Like most passionate nations, Texas has its own private history based on, but not limited by, facts.
– John Steinbeck

GLEASON'S PICTORIAL DRAWING-ROOM COMPANION.



HOUSTON

THANK YOU!!

HOUSTON