



## HOSPITALITY AND TOURISM 2023

### TOTAL ECONOMIC IMPACT

**\$21.5B\***

- 11% YOY increase
- 71% growth over 10 years

### TOTAL TAX REVENUE

**\$280M\***

- 11% YOY increase
- 19.5% growth over 10 years

### TOTAL HOSPITALITY JOBS

**147K\***

- 5% YOY increase
- 19.7% growth over 10 years

\*Source: Bureau Labor of Statistics, & Economic Impact Study was prepared by Richard V. Butler, Ph.D., and Mary E. Stefl, Ph.D., Trinity University.

\*Preliminary figures

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**\$858M**

#### Generated By:

- Strategic Sales, Marketing, PR-Communications

 **21:1**  
ROI

**Return of Investment**  
Based on FY23 Budget

**\$530M\***

#### Total Event Bookings Economic Impact

- 654 total events booked
- 647K room nights booked
- 648K total attendees

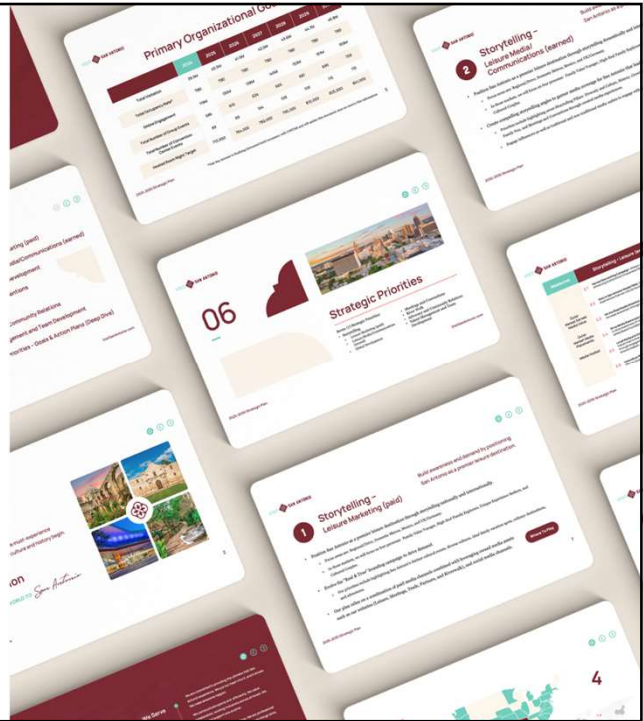
**\$328M**

#### Marketing & PR Economic Impact

- 987,100 trips resulting from trackable digital ads
- Additional trips generated from TV, Print Billboards, Radio and others are not trackable
- \$25.5M Earned Media Value

# FY25 – FY30 STRATEGIC PLAN

FY25 Strategic Plan & Budget





## Primary Organizational Goals

	2024	2025	2026	2027	2028	2029	2030
Total Visitation	39.5M	40.5M	41.5M	42.5M	43.6M	44.7M	45.8M
Online Engagement	119M	130M	138M	145M	153M	161M	169M
Total Number of Group Events	586	610	634	665	681	695	709
Total Number of Convention Center Events	89	99	104	109	109	115	115
Hosted Room Night Target	710,000	764,000	780,000	795,000	810,000	825,000	841,000

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## SAN ANTONIO 2030: *Journey to Excellence*

### Objective

By 2030, we aim to establish San Antonio as a premier global destination for tourism and conventions, showcasing the "Real + True" American experiences.

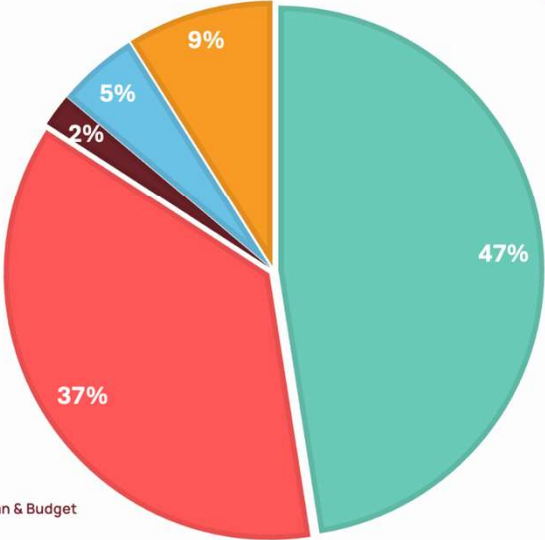
- 1 Protect the drive market
- 2 Expand our reach across the United States
- 3 Bolster our influence in key and emerging global markets
- 4 Secure more meetings and conventions for the Henry B. Gonzalez Convention Center and stakeholders throughout all 10 Districts

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## Use of Funds



Category	Percentage
Storytelling - Marketing, Communications, Tourism	47%
Destination Sales & Experience	37%
Partner & Community Relations	2%
River Walk	5%
Administration	9%

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**SAN ANTONIO 2030: *Strategic Priorities***

- Storytelling
  - Leisure Marketing (paid)
  - Leisure Media/Communications (earned)
  - Global Development
- Meetings and Conventions
- River Walk
- Advocacy and Community Relations
- Talent Management and Team Development

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## Storytelling – Leisure Marketing (paid)

Build awareness and demand by positioning San Antonio as a premier leisure destination.

- Position San Antonio as a premier leisure destination through storytelling nationally and internationally.
  - Focus areas are: Regional/Drive, Domestic Metros, Mexico, and UK/Germany.
  - In those markets, we will focus on four personas: Family Value Voyager, High-End Family Explorers, Unique Experience Seekers, and Cultured Couples.
- Evolve the "Real & True" branding campaign to drive demand.
  - Our priorities include highlighting San Antonio's distinct cultural events, diverse cultures, ideal family vacation spots, culinary destinations, and adventures.
- Our plan relies on a combination of paid media channels combined with leveraging owned media assets such as our websites (Leisure, Meetings, Trade, Partners, and Riverwalk), and social media channels.

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## Storytelling Leisure Marketing (paid) Goals FY25-FY30

	2024	2025	2026	2027	2028	2029	2030
OLE (Online Engagement)	119M	130M	138M	145M	153M	161M	169M
Awareness (Domestic)*	6%	6.3%	6.7%	7.1%	7.6%	8.2%	8.7%
Awareness (Mexico)	11%	12.1%	12.5%	13%	13.5%	14%	14.5%
Awareness (Europe Markets)	1.7%	2.5%	2.8%	3.1%	3.5%	3.8%	4.1%
ROI (Domestic)	96:1	105:1	115:1	126:1	138:1	151:1	166:1

Measures	Storytelling – Leisure (paid) Initiatives FY25-FY30	
<div> <div>Total Visitation</div> <div>Online Engagement</div> <div>Marketing ROI</div> <div>Increased Awareness</div> <div>Incremental Trips</div> </div>	1.1	"Many/Real & True" Branding Campaign: Increase awareness amongst focused markets through paid and organic media channels by consistent yearlong messaging.
	1.2	"Many/Real & True" Persona Focus: The many Real & True campaign will focus on key personas.
	1.3	Global Campaign Support: Through paid and organic media channels, drive visitation through each global focus market with a specific plan per market.
	1.4	Co-Op Partner Development: Through paid media channels, increase partner visibility, generating visitation and positive ROI.
	1.5	Curate Monthly Experiences: Drive short term leisure bookings through special promotions during events/festivals.
	1.6	Innovative Marketing Platforms: (Visit San Antonio.com, 210 Plaza.com): Drive demand and find new audiences by executing and evaluating website content, navigation, exploring new forms of SEO, leverage new AI applications, and improving user experience.

## 2 Storytelling – Leisure Media/ Communications (earned)

Build awareness and demand by positioning San Antonio as a premier leisure destination.

- Position San Antonio as a premier leisure destination through storytelling domestically and internationally.
  - Focus areas are: Regional/Drive, Domestic Metros, Mexico, and UK/Germany.
  - In those markets, we will focus on four personas: Family Value Voyager, High-End Family Explorers, Unique Experience Seekers, and Cultured Couples.
- Create compelling storytelling angles to garner media coverage for San Antonio that leads to travel inspiration.
  - Priorities include highlighting seven Storytelling Pillars: Diversity and Culture, History, Growth and Evolution, San Antonio Icons, Culinary, Family Fun, and Meetings and Conventions through curated media experiences.
  - Engage influencers as well as traditional and non-traditional media outlets to engage with new audiences.



## Storytelling – Leisure Media/Communications (earned) Goals FY25-FY30

	2024	2025	2026	2027	2028	2029	2030
Earned Media Value	\$28M	\$29.5M	\$31M	\$32.5M	\$34.1M	\$35.8M	\$37.6M
Media Placements	1,090	1,145	1,200	1,260	1,325	1,390	1,450
Media Hosted	150	158	166	175	185	195	205

Measures	Storytelling – Leisure (earned) Initiatives FY25-FY30
Outer Market Earned Media Value  Outer Market Media Placements  Media Hosted	<b>2.1</b> Earned Storytelling Campaign: Always-on, constant message pitching to traditional and social media, enhancing Authenticity/Uniqueness/Variety of differentiators to grow awareness.
	<b>2.2</b> Only in San Antonio Media FAMS: Engage journalists and influencers with authentic media experiences that can only be found in San Antonio.
	<b>2.3</b> On the Road Media Missions: Produce engaging media missions in priority media hub cities that will increase awareness through our seven Storytelling Pillars.
	<b>2.4</b> Drive Media Awareness through Consumer Engagement Events: Host consumer and media events to drive awareness of new and exciting happenings in San Antonio to benefit partner businesses (i.e., James Beard Foundation Platform events, London Influencer Breakfast, etc.).
	<b>2.5</b> Local Media and Community Awareness: Secure local media coverage of positive industry news and trends that further establishes the importance of tourism and hospitality in San Antonio.
	<b>2.6</b> Innovative PR: Drive media attention and awareness to find new audiences through innovative PR events (Guerilla Marketing/Stunts - example: RW Inner Tube (Floaties) Activation).

## 3

## Storytelling – Global Development

Focus on targeted domestic and global markets to attract and encourage higher-spending, weekday, and longer-stay leisure travelers.

- Expand our global development strategy by focusing on three primary international markets (Mexico, UK, and Germany) and three emerging international markets (Canada, China, and Australia).
  - Promote our unique selling assets to include UNESCO World Heritage designations, aiming to increase awareness and visitation.
- In addition, global development also works to attract more domestic and global non-stop air service.
  - Focus on the expected ROI for stakeholders from IPW23.

## Storytelling – Global Development Goals FY25-FY30

	2024	2025	2026	2027	2028	2029	2030
Overall International Visitation	2.5M	2.8M	2.9M	3.0M	3.09M	3.18M	3.27M
Mexico	2.28M	2.6M	2.78M	2.8M	2.86M	2.88M	2.9M
United Kingdom	18,700	21,400	22,400	23,200	23,600	24,200	24,600
Germany	9,900	11,600	12,300	12,900	13,100	13,300	13,600
IPW 2023 Return on Investment		TBD	TBD	\$614M*			

Measures	Storytelling – Global Development Initiatives FY25-FY30	
Generate International Visitation  Increase Non-Stop Air Service  IPW23 ROI	3.1	Tour Operator Promotion: Increase brand visibility by working with domestic and global tour operators and partners through participation at various trade shows, training travel buyers/wholesalers.
	3.2	Tourism Marketing Through Supply Channels: Implement short-term market strategies to generate demand and ROI.
	3.3	Key and Emerging Market Opportunities: Develop curated stakeholder experiences to promote through targeted campaigns and strategic partnerships.
	3.4	Air Service Development: Continue to work with the San Antonio International Airport and greater:SATX to secure airline recruitment, retention, and increase seat capacity through targeted funding for both domestic and international markets.
	3.5	IPW23 ROI: Work with Rockport Analytics on a three-year ROI Analysis on IPW23.

**condor** 

American Airlines 

**viva**  
 aerobus

  
**DELTA**

## 4 Meetings and Conventions

Build San Antonio into a premier destination for meetings and conventions.

- Execute a sales and marketing strategy aimed at driving citywide conventions and in-house meetings.
  - Focus on four revenue segments: Associations, Trade Show, Sporting, and Corporate Events.
  - Focus on the following geographic markets: Texas, Mid-Atlantic, Midwest, Southeast, West Coast, and Northeast.
- To support this strategy, we will concentrate on vertical markets in the following areas: Technology and Communications, Health and Medical, Scientific and Engineering, Athletics and Sports, and SMERF (Social, Military, Educational, Religious, and Fraternal).
- Capitalize on the many group-focused strategic partnerships (i.e., PCMA, ASAE, Maritz, etc.) Visit San Antonio has developed over the past 36 months to drive demand in all four revenue segments.



## Meetings and Conventions Goals FY25-FY30

	2024	2025	2026	2027	2028	2029	2030
Hosted Events	586	610	634	665	681	695	709
Hosted Room Night Target	710,000	764,000	780,000	795,000	810,000	825,000	841,000
Hosted Convention Center Events	89	99	104	109	109	115	115
Hosted Total Citywide Events	43	52	55	58	60	62	64
Hosted Corporate Citywide Events	7	9	9	10	11	12	13

Measures	Meetings and Conventions Initiatives FY25-FY30
Generate Leads / Total Group Events  Total Citywide Events  Total Group Room Nights	<b>4.1 Geographic Market Segment Performance:</b> Update geographic market plans to drive demand for citywide convention and in-house meetings.
	<b>4.2 Meeting Professional Outreach:</b> Build customer relationships through prospecting calls, face-to-face appointments, industry events, tradeshows, and strategic partnerships to drive new leads and book future events.
	<b>4.3 Enhance Group Marketing to Drive Awareness:</b> Develop a new group marketing campaign to express the uniqueness and capabilities of the destination.
	<b>4.4 Increase Large Association Conventions to HBGCC:</b> Capitalize on the many group focused strategic partnerships (i.e.PCMA, ASAE, Maritz, etc.) Visit San Antonio has developed over the past 36 months.
	<b>4.5 Texas Associations:</b> Execute engagement strategy ensuring San Antonio remains the destination of choice while increasing market share of Texas' Legacy Associations.
	<b>4.6 Grow Corporate citywide Conventions:</b> Utilize local corporate infrastructure and greater SATX to increase corporate citywide conventions (Port SA, Cybersecurity, Automotive, etc.).
	<b>4.7 Build San Antonio into a Premier Sporting Events Destination:</b> Work with San Antonio Sports (SAS) to capture larger domestic and international sporting events.
	<b>4.8 Strengthen Destination Experiences:</b> To enhance and streamline the planning process for our meeting planners and partners, while ensuring ease of conducting business and curating an authentic San Antonio experiences.



## 5 River Walk

Elevate curated experiences to attract residents and travelers to assist River Walk businesses to thrive.

- Create and promote world-class events and programming to attract both residents and travelers to the River Walk (RW) while supporting the success of RW businesses.
  - Promote the unique offerings of the River Walk.
  - Activate key venues and channels of the waterway to increase visitation.
- Ensure fiscal responsibility of all activations and events.
  - Generate new opportunities to drive demand for local River Walk operators and businesses.

## River Walk Goal FY25-FY30

	2024	2025	2026	2027	2028	2029	2030
Revenue Goals	\$1.46M	\$1.67M	\$1.75M	\$1.8M	\$1.85M	\$1.9M	\$1.95M

Measures	River Walk Initiatives FY25-FY30	
<div>RW Events</div> <div>RW Partnerships/ Memberships</div> <div>RW Sponsorships</div>	5.1	<b>RW Events and Programming:</b> Create excellent events that help the River Walk area thrive while amplifying local arts/artists, our history, culture, diversity and culinary offerings and drive attendance to all sections of the River Walk.
	5.2	<b>RW Sponsorships and Revenue Sources:</b> Identify new sponsorship opportunities and revenue sources for RW events to ensure success and viability.
	5.3	<b>RW Parade Barge Management:</b> Manage, maintain, and upgrade parade barge assets and supporting equipment to ensure successful execution of events.
	5.4	<b>River Walk Marketing Paid Activations:</b> Drive local and traveler awareness by promoting all River Walk events managed by Visit San Antonio (including River Walk LIVE, Holiday Parade, Day of the Dead parades, etc.).
	5.5	<b>River Walk Media Earned Activations:</b> Promote all RW events to local and global journalists and influencers expressing the authenticity and uniqueness of San Antonio.

## 6 Advocacy and Community Relations

Engage with key stakeholders to create and protect a thriving San Antonio tourism industry.

- Support initiatives that help San Antonio create and protect a thriving tourism industry.
  - Engage with local, state, and federal industry on legislative issues affecting the sector.
- Work with our board and committee structure to focus on strategic issues, drive engagement, and enhance governance.
- Communicate the power of tourism as an economic driver and job producer to protect our budget and YoY increases.
- Collaborate with City leadership to enhance a greater downtown while creating signature events that will serve all of San Antonio.
- Give back to our community through fundraising and event activations.
- Ensure DE&I is a focus across the organization.

Measures	Advocacy and Community Relations Initiatives FY25-FY30	
Legislative Agenda Progress	6.1	<b>Local, State and Federal Governments Advocacy:</b> Build relationships with elected officials and help inform/advise them on tourism industry issues and economic impact.
	6.2	<b>Board Governance and Committee Engagement:</b> Evolve the role of the Visit San Antonio Board of Directors and committee structure to advise and engage with the staff on strategic issues.
	6.3	<b>Citywide Stakeholder Management / Messaging:</b> Align and engage citywide stakeholders with Visit San Antonio's purpose and hospitality industry's value and economic impact.
Board/ Committee Engagement	6.4	<b>Partner/Membership Platform (Hotels, Restaurants, Venues, Attractions, Service Providers):</b> Continue to build membership program by adding new members each year and retaining existing members. Continue to engage members.
Economic Impact & Successes	6.5	<b>Contracts and Budget Streams:</b> Consistently communicate to a broad group of stakeholders the performance and progress of Visit San Antonio's initiatives to secure renewals of critical contracts and income streams.
Contracts & Budget Streams	6.6	<b>Strategic Framework Plan/Urban Planning:</b> Work with the City and urban development consulting firm HR&A to develop a new strategic framework plan for downtown and help promote San Antonio's center to visitors.
DE&I Scorecard	6.7	<b>Legacy Partnership Events with COSA and Centro:</b> Execute excellent events such as Holidays on Houston Street, July 4th Celebration, Day of the Dead, Wine + Food Festival to drive residents and domestic visitors to downtown.
	6.8	<b>San Antonio Hospitality Foundation (501c3):</b> Develop a schedule of fundraising activities and further develop the Visit San Antonio scholarship program for local hospitality/tourism students.
	6.9	<b>DE&amp;I:</b> Ensure DE&I is incorporated into the foundation of every initiative and department of the organization.



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## San Antonio Hospitality Foundation Endowed Scholarships



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# THANK YOU