Economic and Fiscal Benefits of the Dallas Zoo

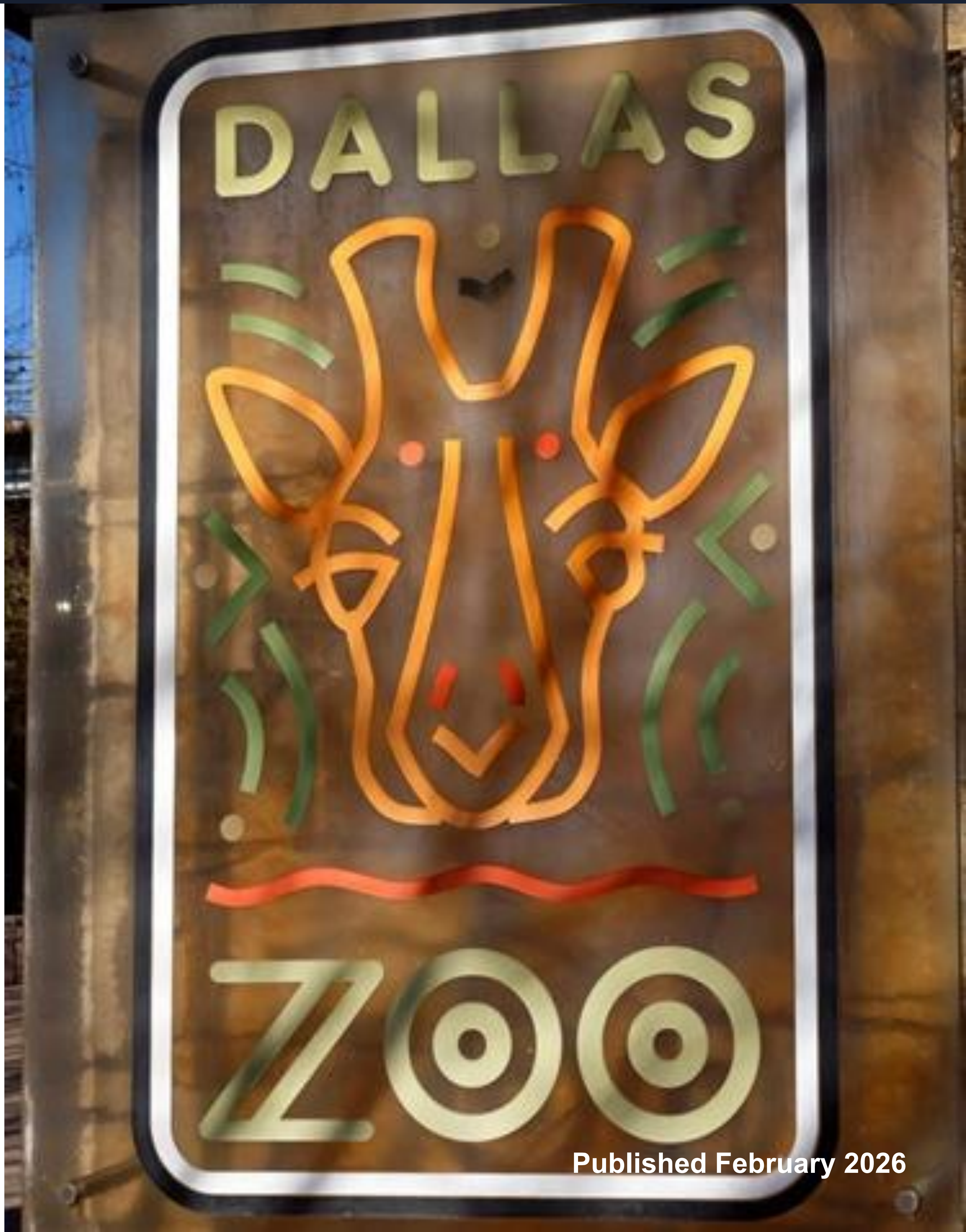
Prepared by:

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

canopy
STRATEGIC PARTNERS

Prepared for:

DALLAS ZOO



Published February 2026

CONTENTS

canopy STRATEGIC PARTNERS

TOURISM ECONOMICS

Introduction

The Dallas Zoo ('Zoo') was established in 1888 and is the oldest and largest zoological park in Texas with more than 2,000 animals representing 406 species. The Zoo is 106 acres and is located three miles south of downtown Dallas, Texas.

The Zoo attracts patrons from around the region and country, which drives significant economic activity that supports businesses, households, and government finances in the City of Dallas.

Tourism Economics and Canopy Strategic Partners prepared a comprehensive model using multiple primary and secondary data sources to quantify the impact of the Dallas Zoo.

Impact modeling was based on an IMPLAN Input-Output (I-O) model for the local economy of Dallas. The results of the study show the scope of the Dallas Zoo in terms of direct patron spending and operations, as well as total economic impacts, including employment, household income, and fiscal (tax) impacts.

KEY FINDINGS

Direct Impacts – FY25 to FY36

Summary Direct Spending (FY25 to FY36)

The Dallas Zoo generates economic impacts as the Zoo and other stakeholders spend money to sustain operations of the Zoo, including spending on payroll, advertising, animal nutrition, outside services, membership, and insurance, among others.

In addition to spending money during their visit to the Zoo, patrons spend money at businesses and establishments in the local economy during their stay in Dallas, including at local restaurants, retailers, hotels, and recreation/entertainment venues.

Between FY25 and FY36, the Zoo will generate nearly $1.7 billion in direct spending in Dallas, or an average of $139.5 million per year over the 12-year period.

$1,077.1M Off-Site Patron Spending **+** **$596.3M** Operational Spending **=** **$1,673.4M** Direct Spending Impact

Note: totals by not sum due to rounding.

Total Economic Impact (FY25 to FY36)

The Dallas Zoo's direct spending impact of $1.7 billion from FY25 to FY36 will generate a total economic impact of $3.2 billion in the local economy (or an average of $268.7 million over the 12-year period), which will support an average of 1,800 total jobs each year and $149.9 million in state and local tax revenues.

$3.2 BILLION
Total Economic Impact of the Dallas Zoo (FY25 to FY36)

Summary Economic Impacts of the Dallas Zoo (FY25 to FY36)

$268.7M	$3.2B	1,800	$149.9M
Average Annual Total Economic Impact	Total Economic Impact	Total Annualized Jobs Supported	Total State & Local Taxes

ECONOMIC IMPACTS (FY25 to FY36)

Direct Impacts – FY25 to FY36

The Dallas Zoo will generate $1.7 billion in direct spending in the local economy.

The following pages outline the Dallas Zoo's historical direct impacts, which ultimately serve as inputs for the economic impact model. The direct impacts are separated into two spending categories:

- $596.3 million in operational spending by the Dallas Zoo
- $1,077.1 million in off-site spending by Zoo patrons at businesses and establishments in the local economy

Operational Spending (FY25 to FY36)

The Dallas Zoo will spend $596.3 million between FY25 and FY36 to sustain operations of the Zoo, including spending on payroll, advertising, animal nutrition, outside services, membership, and insurance, among others.

Over the twelve-year period between FY25 and FY36, the Dallas Zoo will spend an average of $49.7 million per year on operations.

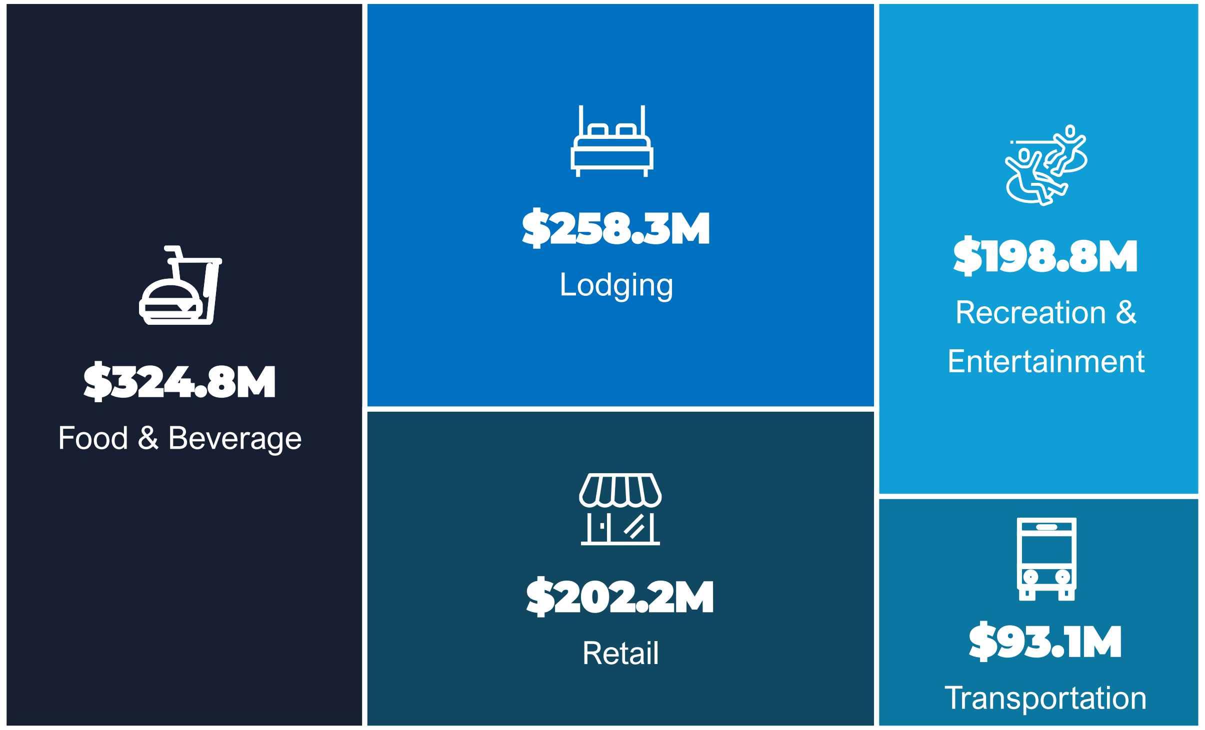
Visitor Spending (FY25 to FY36)

The Dallas Zoo will attract 14.5 million patrons between FY25 and FY36, or an average of 1.2 million patrons per year.

Approximately 77% of all patrons originated from outside the City of Dallas, which includes 51% that visited for the day and 25% that spent the night in Dallas.

The non-local Zoo patrons will spend $1,077.1 million between FY25 and FY36 at local businesses and establishments, including $324.8 million in food and beverage expenditures, $258.3 million in lodging expenditures, $202.2 million in retail spending, $198.8 million in entertainment/recreation purchases, and $93.1 million in local transportation (including gasoline purchases).

Over the twelve-year period from FY25 to FY36, the Zoo patrons will spend an average of $89.8 million per year at local businesses and establishments.



The Dallas Zoo will generate **$1.7 billion** in direct spending in the local economy between FY25 to FY36.

Direct Spending – Total (FY25 to FY36)

In total, when operational spending and off-site patron spending is considered, the direct spending associated with the Dallas Zoo will amount to $1.7 billion between FY25 and FY36.

Dallas Zoo Direct Spending
($ millions, FY25 to FY36)

	FY25 to FY36 (Total)	FY25 to FY36 (Average)
Total Direct Spending	**$1,673.4**	**$139.5**
Operational Spending	$596.3	$49.7
Off-Site Patron Spending	$1,077.1	$89.8

Source: Canopy Strategic Partners, Tourism Economics

Note: totals by not sum due to rounding.

Summary Direct Impacts (FY25 to FY36)

The total direct impact attributable to the Dallas Zoo will amount to $1.7 billion between FY25 and FY36, including $596.3 million in operational spending and $1.1 billion in off-site patron spending.

$596.3M Operational Spending + **$1,077.1M** Off-Site Patron Spending = **$1,673.4M** Direct Spending Impact

Economic Impacts

Tourism Economics estimated the economic impacts of the Dallas Zoo's direct spending using regional Input-Output (I-O) model based on a customized IMPLAN (www.implan.com) model for the local economy. IMPLAN is recognized as an industry standard in local-level I-O models. IMPLAN is recognized as an industry standard in local-level I-O models.

An I-O model represents a profile of an economy by measuring the relationships among industries and consumers to track the flow of industry revenue to wages, profits, capital, taxes and suppliers. The supply chain is traced as dollars flow through the economy, representing indirect impacts. The model also calculates the induced impacts of spending. Induced impacts represent benefits to the economy as incomes earned as a result of direct spending are spent in the local economy, generating additional sales, jobs, taxes, and income.

The modeling process begins with aligning the direct expenditure measurements with the related sectors in the model (e.g. hotels, restaurants, retail, and recreation). The model is then run to trace the flow of these expenditures through the economy. In this process, the inter-relationships between consumers and industries generate each level of impact.

IMPLAN is particularly effective because it calculates these three levels of impact – direct, indirect, and induced – for a broad set of indicators. These include the following:

- Business sales (also called gross output)
- Household income (including wages and benefits)
- Employment
- Federal taxes
- State and local taxes

Economic Impact Framework

DIRECT

Dallas Zoo contribution measured by operational spending and patron spending on retail, lodging, transportation, dining, recreation and entertainment etc.

INDIRECT

Dallas Zoo-related businesses purchase goods and services from other providers creating supply chain effects and engaging B2B goods and services

INDUCED

Employees of Zoo-related businesses spend wages throughout the wider economy, generating GDP, jobs and tax revenue

TOTAL IMPACT

SALES

JOBS

TAXES

INCOME

Direct, indirect and induced impacts combine to equal the total economic impact

Dallas Zoo Summary Impacts (FY25 to FY36)

The Dallas Zoo will generate an economic impact of $3.2 billion in the local economy between FY25 to FY36.

Between FY25 and FY36, the Dallas Zoo will generate a total economic impact of $3.2 billion in the local economy, which will support more than 1,800 annualized part-time and full-time jobs and will generate $149.9 million in state and local tax revenues.

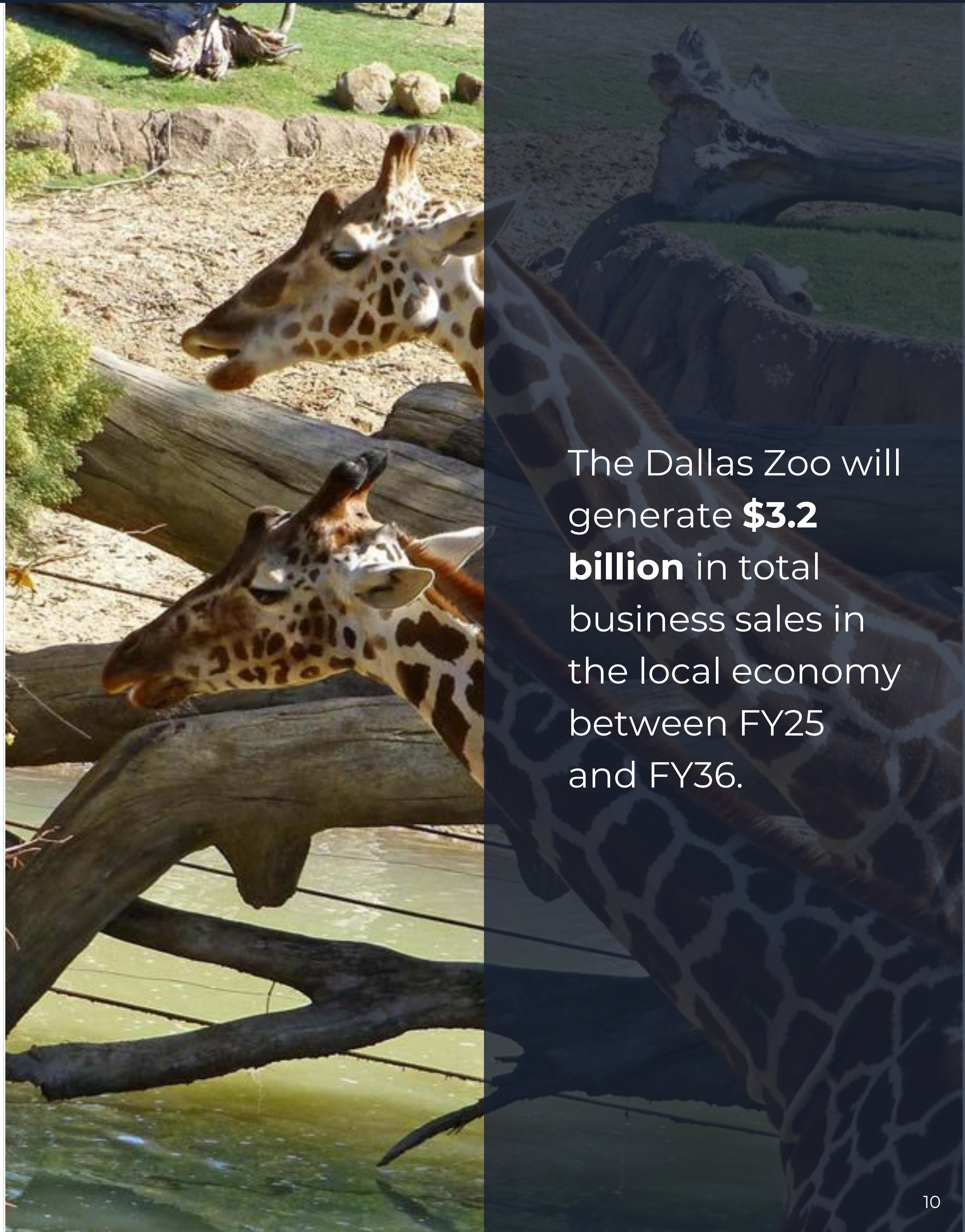
Dallas Zoo Summary Economic Impacts
($ millions and number of annualized jobs, FY25 to FY36)

Description	Impact
Total economic impact ($ millions)	**$3,224.6**
Direct spending by non-local patrons	$1,673.4
Indirect & induced impacts	$1,551.2
Total labor income ($ millions)	**$1,016.7**
Direct labor income	$571.6
Indirect & induced labor income	$445.1
Total employment impact (annualized jobs)	**1,842**
Direct jobs	1,205
Indirect & induced jobs	637
Total taxes ($ millions)	**$369.6**
Total federal taxes	$219.7
Total state & local taxes	$149.9

Source: Tourism Economics

Note: totals by not sum due to rounding.

Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the eleven-year period between FY25 and FY36.



Economic Impacts – Business Sales (FY25 to FY36)

Operational spending and spending by non-local zoo patrons will generate a total economic impact of $3.2 billion between FY25 and FY36.

The $1.7 billion in operational spending and spending by non-local zoo patrons will generate $770.4 million in indirect business sales and $780.8 million in induced business sales, resulting in a total economic impact of $3.2 billion between FY25 and FY36.

Summary Economic Impacts (FY25 to FY36)

$1,673.4M + **$770.4M** + **$780.8M** = **$3,224.6M**

Operational Spending & Off-Site Spending by Non-Local Patrons	Indirect Business Sales	Induced Business Sales	Total Business Sales
$1,673.4M	$770.4M	$780.8M	$3,224.6M

Economic Impacts (FY25 to FY36) Business Sales by Industry ($ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$1,673.4**	**$770.4**	**$780.8**	**$3,224.6**
By industry				
Recreation and Entertainment	$735.0	$24.7	$10.0	$769.7
Finance, Insurance and Real Estate	$14.9	$259.2	$239.1	$513.2
Food & Beverage	$324.8	$19.1	$59.1	$403.1
Business Services	$47.0	$208.8	$81.2	$337.0
Retail Trade	$202.2	$8.0	$66.6	$276.8
Lodging	$258.3	$0.2	$1.1	$259.6
Education and Health Care	$0.0	$5.3	$96.2	$101.5
Communications	$0.0	$52.3	$46.8	$99.0
Other Transport	$23.0	$42.8	$23.0	$88.7
Wholesale Trade	$0.0	$34.3	$47.3	$81.6
Construction and Utilities	$9.4	$42.6	$21.0	$72.9
Gasoline Stations	$58.9	$0.5	$4.9	$64.3
Manufacturing	$0.0	$34.9	$28.0	$62.9
Personal Services	$0.0	$17.0	$34.5	$51.4
Government	$0.0	$13.6	$11.8	$25.4
Air Transport	$0.0	$3.3	$5.9	$9.2
Agriculture, Fishing, Mining	$0.0	$3.8	$4.3	$8.1

Source: Tourism Economics

Note: totals may not sum due to rounding.

Economic Impacts – Employment (FY25 to FY36)

Operational spending and spending by non-local zoo patrons will generate a total employment impact of 1,800 annualized jobs throughout the local economy

The total economic impact attributable to operational spending by non-local zoo patrons will support 1,842 part-time and full-time jobs on an annual basis throughout the local economy, including approximately 1,200 direct jobs (including jobs on-site at the Zoo), 306 indirect jobs, and 331 induced jobs.

The recreation and entertainment industry will be the most impacted industry, with more than 660 total jobs. The food and beverage industry will follow with approximately 325 total jobs.

Annual Economic Impacts (FY25 to FY36)
Employment Impacts by Industry (annualized jobs)

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total Jobs, All Industries	**1,205**	**306**	**331**	**1,842**
By industry				
Recreation and Entertainment	627	25	10	662
Food & Beverage	256	18	51	325
Lodging	204	0	1	206
Business Services	31	97	38	166
Finance, Insurance and Real Estate	5	78	50	132
Retail Trade	51	5	42	98
Other Transport	25	35	16	75
Education and Health Care	0	4	63	67
Personal Services	0	12	30	42
Wholesale Trade	0	7	9	16
Manufacturing	0	9	4	13
Communications	0	6	6	12
Construction and Utilities	3	5	3	11
Government	0	5	3	8
Gasoline Stations	3	0	2	5
Agriculture, Fishing, Mining	0	1	1	2
Air Transport	0	1	1	2

Source: Tourism Economics

Note: totals may not sum due to rounding.

Economic Impacts – Labor Income (FY25 to FY36)

Operational spending and spending by non-local zoo patrons will generate a total labor income impact of $1.0 billion throughout local economy between FY25 and FY36

The total economic impact attributable to operational spending by non-local zoo patrons will support $571.6 million in direct labor income, $220.9 million in indirect labor income, and $224.2 million in induced labor income, resulting in $1.0 billion in total labor income throughout the local economy between FY25 and FY36.

The recreation and entertainment industry will be the most impacted industry, with $357.3 million in total labor income.

Annual Economic Impacts (FY25 to FY36)
Labor Income Impacts by Industry ($ millions)

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total Labor Income, All Industries	$571.6	$220.9	$224.2	$1,016.7
By industry				
Recreation and Entertainment	$345.0	$8.7	$3.7	$357.3
Business Services	$18.2	$92.5	$36.3	$147.0
Food & Beverage	$89.1	$6.8	$18.4	$114.3
Finance, Insurance and Real Estate	$2.6	$46.2	$38.0	$86.8
Lodging	$84.9	$0.1	$0.6	$85.6
Education and Health Care	$0.0	$2.5	$50.3	$52.8
Retail Trade	$20.8	$2.3	$19.3	$42.4
Other Transport	$7.8	$17.2	$7.7	$32.7
Personal Services	$0.0	$7.0	$14.8	$21.7
Wholesale Trade	$0.0	$9.2	$12.1	$21.3
Communications	$0.0	$8.4	$9.7	$18.1
Manufacturing	$0.0	$7.1	$3.8	$10.9
Construction and Utilities	$1.8	$5.4	$2.9	$10.2
Government	$0.0	$6.4	$3.6	$10.0
Air Transport	$0.0	$1.0	$1.7	$2.7
Gasoline Stations	$1.4	$0.1	$1.0	$2.5
Agriculture, Fishing, Mining	$0.0	$0.2	$0.2	$0.4

Source: Tourism Economics

Note: totals may not sum due to rounding.

Fiscal (Tax) Impacts (FY25 to FY36)

The total economic impact of $3.2 billion attributable to operational spending and spending by non-local patrons will generate $369.6 million in total tax revenues between FY25 and FY36, including $149.9 million in state and local taxes.

Operational spending and spending non-local Zoo patrons will generate a total fiscal (tax) impact of $369.6 million between FY25 and FY36.

Total federal taxes will amount to $219.7 million, including $107.3 million in personal income taxes, $20.4 million in corporate taxes, $4.3 million in indirect business taxes, and $87.7 million in social insurance taxes.

Total state and local taxes will amount to $149.9 million, including $87.7 million in sales taxes, $14.2 million in excise taxes and fees, and $47.3 million in property taxes between FY25 and FY36.

Fiscal (Tax) Impacts (FY25 to FY36) Total Tax Revenues ($ millions)

	Direct	Indirect & Induced	Total
Total Taxes	**$194.6**	**$234.7**	**$369.6**
Federal	**$104.5**	**$175.0**	**$219.7**
Personal income	$59.3	$47.9	$107.3
Corporate	$7.2	$13.2	$20.4
Indirect business	$2.2	$2.1	$4.3
Social insurance	$35.8	$51.9	$87.7
State and Local	**$90.1**	**$59.8**	**$149.9**
Sales	$58.9	$28.8	$87.7
Excise and fees	$7.2	$7.0	$14.2
Property	$23.7	$23.5	$47.3

Source: Tourism Economics

Note: Totals may not sum due to rounding.

APPENDIX

Economic Impacts: Annual Impacts by Type

Annual economic impacts attributable to the Dallas Zoo

($ millions and number of annualized jobs)

	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33	FY34	FY35	FY36	Total, FY25-FY36
Total attendance	951,563	1,052,999	1,053,023	1,121,975	1,225,539	1,310,319	1,312,974	1,310,686	1,295,984	1,293,986	1,296,133	1,294,504	14,519,685

Business Sales Impacts

	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33	FY34	FY35	FY36	Total, FY25-FY36
Visitor spending	$61.9	$70.5	$72.0	$77.8	$87.0	$95.2	$97.5	$99.5	$100.6	$102.6	$105.1	$107.3	$1,077.1
Operational spending	$37.7	$41.2	$42.8	$45.2	$47.3	$49.0	$50.8	$52.7	$54.5	$56.3	$58.4	$60.3	$596.3
Direct business sales	**$99.7**	**$111.7**	**$114.8**	**$123.1**	**$134.4**	**$144.2**	**$148.3**	**$152.2**	**$155.0**	**$159.0**	**$163.5**	**$167.6**	**$1,673.4**
Indirect & induced impacts	$94.5	$105.0	$106.8	$111.2	$124.1	$133.2	$138.0	$139.5	$145.5	$146.9	$151.3	$155.1	$1,551.2
Total business sales	**$194.2**	**$216.7**	**$221.6**	**$234.3**	**$258.5**	**$277.3**	**$286.4**	**$291.8**	**$300.6**	**$305.9**	**$314.8**	**$322.7**	**$3,224.6**

Other Economic Impacts

	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33	FY34	FY35	FY36	Total, FY25-FY36
Labor income	$61.2	$68.3	$69.9	$73.9	$81.5	$87.4	$90.3	$92.0	$94.8	$96.4	$99.2	$101.7	**$1,016.7**
Employment (annualized)	1,331	1,485	1,519	1,606	1,771	1,901	1,963	2,000	2,060	2,097	2,157	2,211	**1,842**
Taxes	$22.3	$24.8	$25.4	$26.9	$29.6	$31.8	$32.8	$33.4	$34.4	$35.1	$36.1	$37.0	**$369.6**
State & local taxes	$9.0	$10.1	$10.3	$10.9	$12.0	$12.9	$13.3	$13.6	$14.0	$14.2	$14.6	$15.0	**$149.9**
Federal taxes	$13.2	$14.8	$15.1	$16.0	$17.6	$18.9	$19.5	$19.9	$20.5	$20.8	$21.4	$22.0	**$219.7**

About the Research Team

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

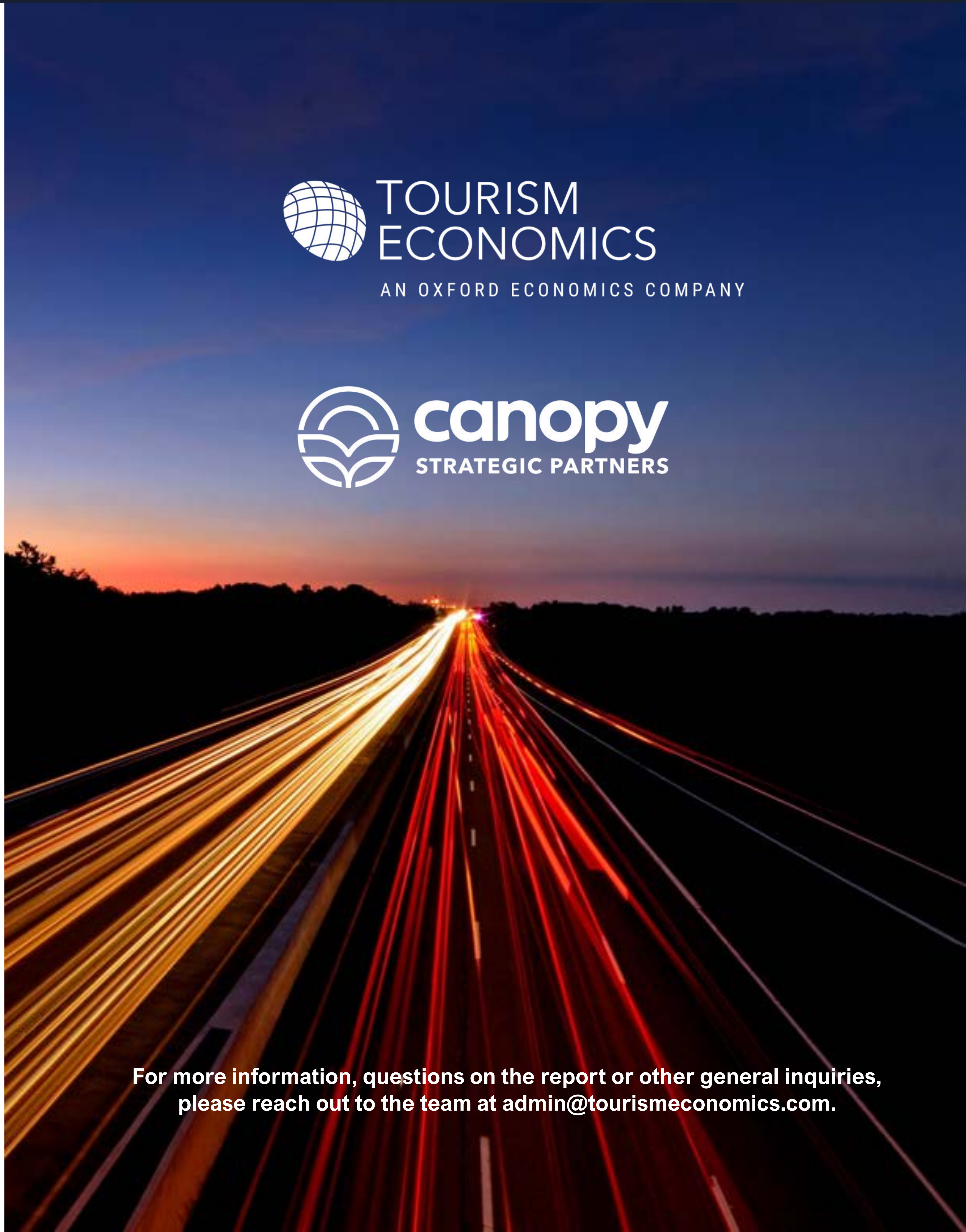
This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 600 full-time staff, including 300 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, , San Francisco, and Washington DC.

Canopy Strategic Partners is a full-service planning and consulting firm dedicated to helping mission-driven organizations create a better future for the planet. We are champions of leaders, community builders, and collaborative experts.

Our team of distinguished but down-to-earth experts has extensive experience collaborating with mission-based organizations of all sizes, in all types of communities, all across the globe. We have completed over 200 consulting projects in the last decade, including strategic, master, and business plans; feasibility studies; pricing research; and economic impact studies.

At Canopy, we strive to balance your mission with the need for continued growth and long-term financial sustainability. We are proven thought leaders with the experience and the expertise to help you and your organization succeed on both fronts.



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY