Houston

2013 Travel/Houston Visitor Profile
2014 Ad Effectiveness

TNS: 212 237479

Contents

1
Executive Summary

Growth summary

Your business issues

- Tourism supported 121,000 jobs in Houston in 2012 and generated $15.5 billion for the local economy (up 9% from 2011)*.
- With increasing attention as a travel destination, US News and World Report named it the 7th-best shopping city in the world and Forbes recently predicted that, within a decade, it would be the nation's "next great global city." In addition, arts events regularly earn national attention.
- The GHCVB (Greater Houston Convention and Visitors Bureau) wants to continue to grow its tourism sector and, in addition to a well-received series of "My Houston" television commercials, has added Houston "inspired vacations" ads that promotes its zoo adventures, tasty cuisine, Jurassic dinosaurs, and romantic retreats. Specific goals include:
- Boosting Houston's position among key competitors
- Encouraging more people to visit Houston
- Building larger revenue streams from current travelers by:
  - Advocating longer trips
  - Motivating travelers to add more visits throughout the year and to take advantage of the large variety of activities/attractions available in Houston.

*http://deanrunyan.com/

Growth summary

Growth insights

- GHCVB advertising can concentrate on Texas since the state represents the most critical market for Houston – **61%** of its visitors live in **Texas** (TNS' TravelsAmerica). Louisiana contributes only **9%**.
- Houston has a lot on which to build interest and promotions, with two-thirds of travelers believing that **Houston's *Arts/Culture* and *Leisure/ Entertainment*** excels over other cities; however, it lags on ***Transportation*** and ***Safety***.
- The addition of new print and online ads (and one new television ad) contribute to **continuously improving ad awareness** and, together with **a longer ad schedule**, build positive interest in the city.
- **All GHCVB ads strongly appeal (likeability) to potential visitors and can entice new visitors.**
- The core visitor (female 35-55) praises Houston and has media habits that make them easy to reach; they watch TV comedies and dramas, use the Internet, and half use social media daily.
- However regional leisure travelers are hard, and getting harder, to reach via print, especially newspapers.

Precise plans for growth

- Maintain focus on large Texas markets within driving distance and **add medium-sized Texas markets** (such as Waco) and cities in bordering states, such as Baton Rouge and New Orleans, when budgets allow.
- Consider ways to address *transportation* and *safety* issues that detract from Houston, recognizing that may involve city infrastructure changes beyond the scope of advertising.
- Continue the *arts/cultural* and *entertainment* focus which appeals to potential visitors.
- Keep and perhaps enhance current commercials and online ads which are strong enough to influence people. While not unimportant, print ads play a smaller role.
- Seek new ways to get **Houstonians to act as advocates** – such as testimonials, blogs, or Facebook incentives.
- Maintain attention to the already outstanding website.

Ads work: "I didn't know that there was so much to do in Houston"

Brief abstract

Positive Trends and Results

- **Competitively,** Houston **residents** remain strong advocates of their city, with more of them commending its virtues (particularly *dining, cultural diversity, cultural entertainment, variety, shopping, nightlife*) compared to **residents** of other cities – plus, the proportion is growing
- **Visitors** increasingly praise Houston for*: its experiences, a place to revisit, a place they would recommend*, and *for its value*
- **Travelers describe** it as strong and generally improving on *diversity, culture, success, creativity, fun, progress, and connectedness*
- Further, Houston shines over "other US cities" on *arts/culture, leisure/entertainment,* and *employment opportunities*
- Houston satisfies visitors, especially past year visitors
- Spending continues to hover near $500
- Overall awareness of the ad campaign continues to climb (42% from 40% in 2013 and 36%, 29%, and 23% in each preceding year)
- Although not many (4%) recall the new print "Inspired Vacations" ads, they get high marks for likeability and believability
- Similarly, very few dislike the new online banner ads
- The Target group of Houston visitors (35-55 females) consistently assign equal-to-stronger ratings to features of the ads than non-target visitors.

"Great city"

Opportunities

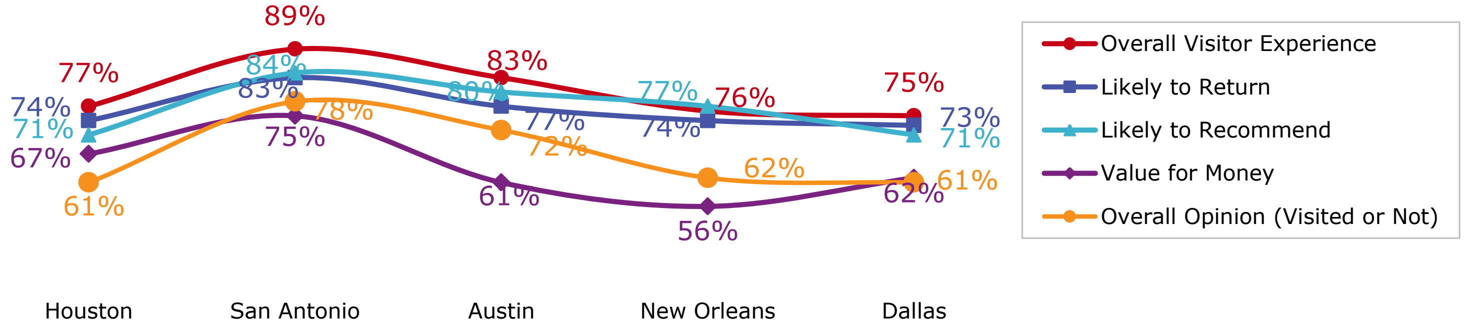
- Continue to nurture Texans as potential visitors – Houston tourism depends on them with nearly two-thirds (61%) of Houston visitors living in Texas (from TravelsAmerica). Louisiana ranks as a very distant second, with 9% of visitors from there; California is third (4%).
- Houston compares favorably with other Texas areas, still, most Texas visitors still go somewhere else on their vacations (17% visited Houston; 19% Dallas, 13% San Antonio, and 11% Austin)
- With San Antonio and Austin taking the lead on "everything you want in a leisure destination," Houston should continue to punctuate advertising messaging with the strengths of the city – which it does – in order to broaden interest.

"I moved here for safety, outdoor activities, friendly people, and generally healthier, happier lifestyle."

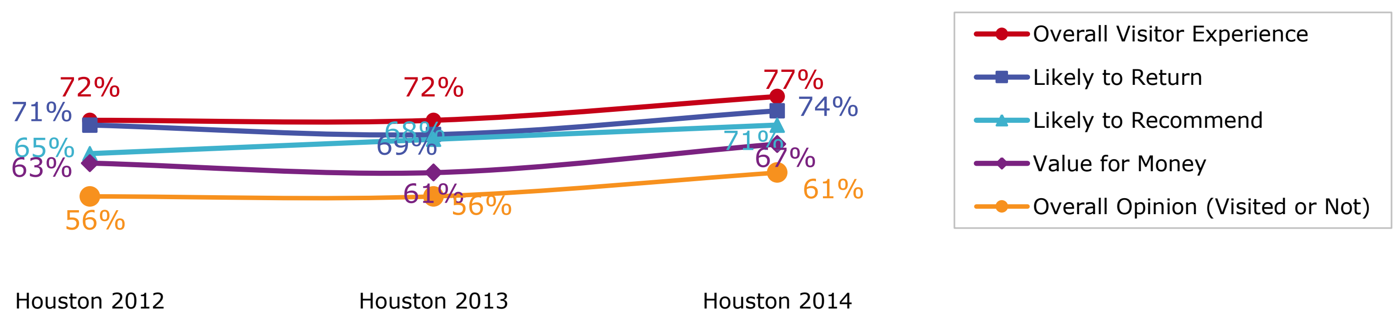
Key points

Moderate Competitive Standing

- **While San Antonio sets the standard in image, followed by Austin; Houston competes with Dallas and New Orleans:**



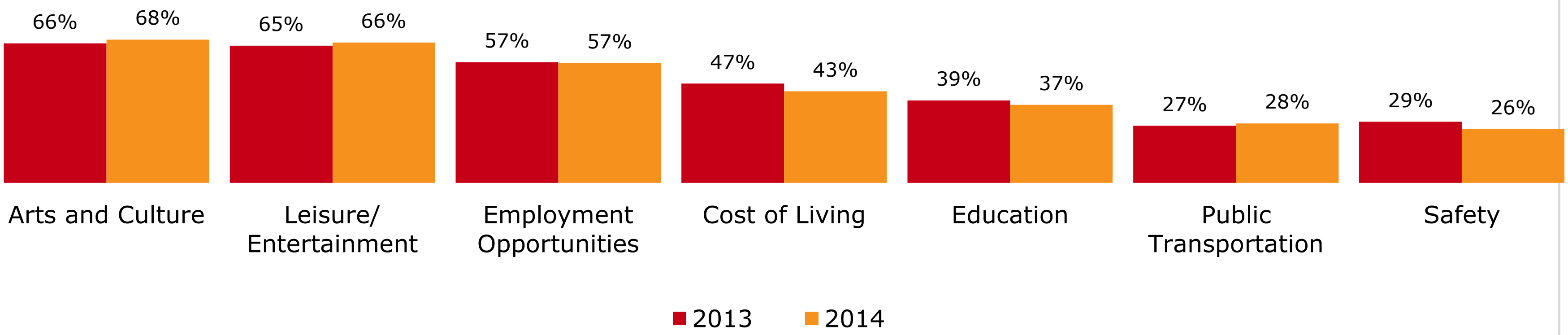
- **Plus, Houston's efforts pay off with improving scores in 2014:**



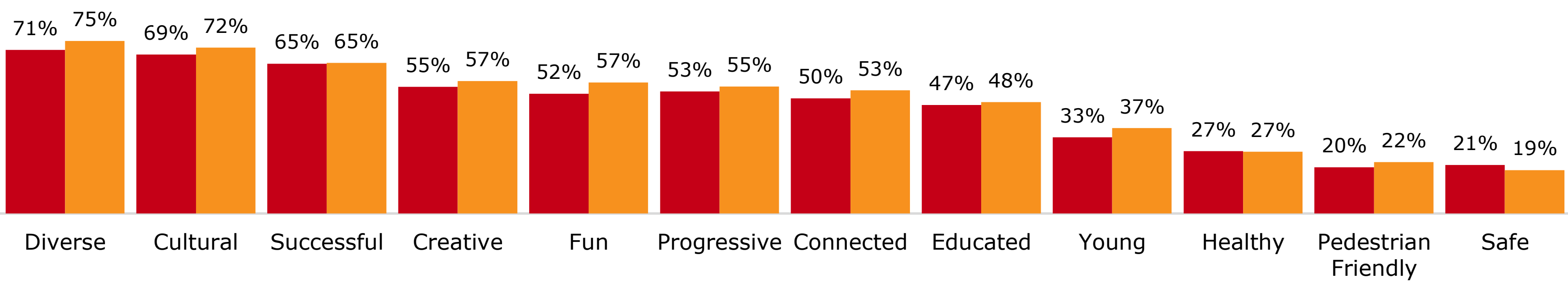
Key points *continued*

Has Many Strengths

- **Compared to others cities, Houston excels in urban activities. Houston is better (much/somewhat) than other cities:**



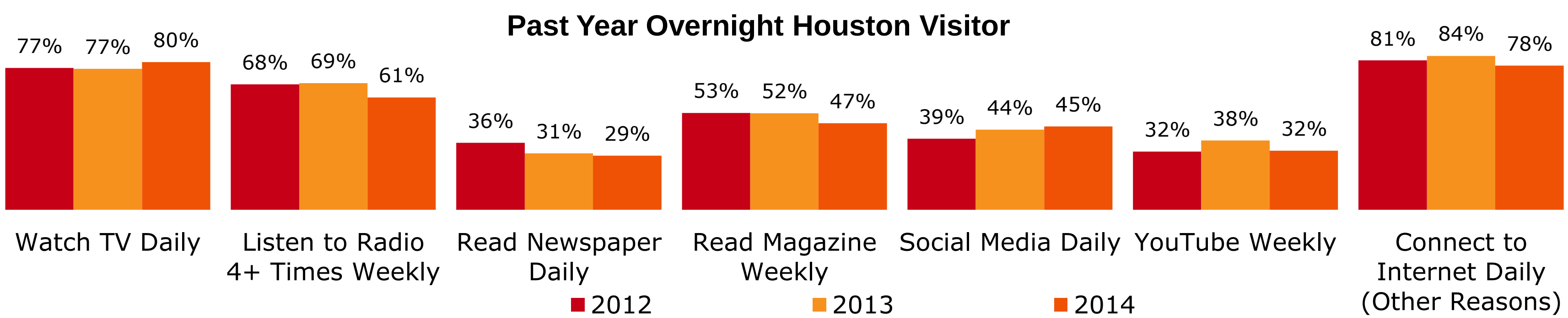
- **And, except for safety, its imagery trends upwards or stays in place:**



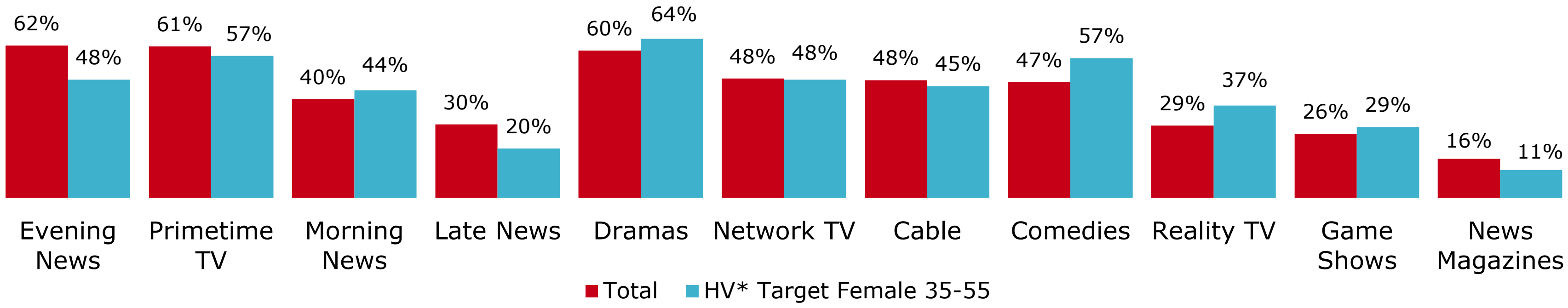
Key points *continued*

Where to Advertise

- **Advertising awareness is maximized with television and the internet:**



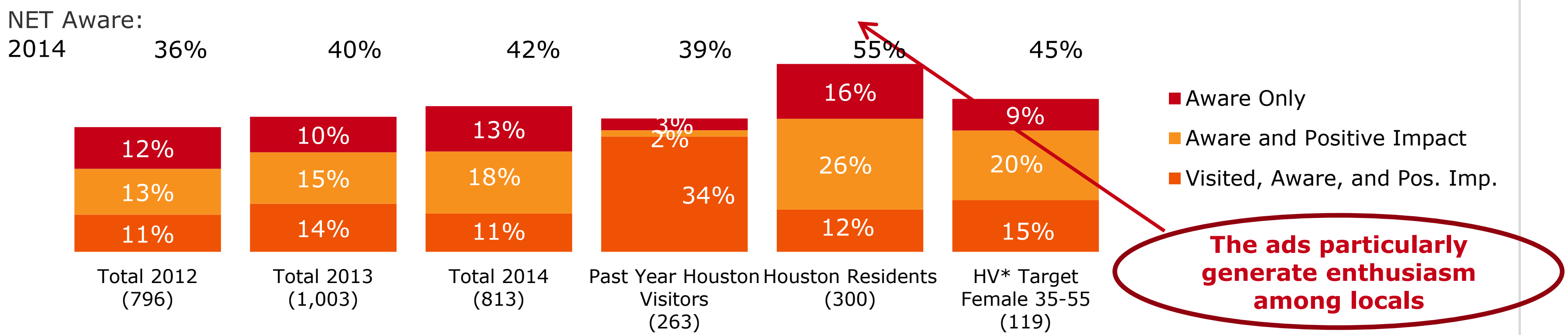
- **In looking at ad placement, the core Target Market, defined as Female Houston Visitors 35-55, prefer comedies and dramas; fewer of them watch news in the evening or late night:**



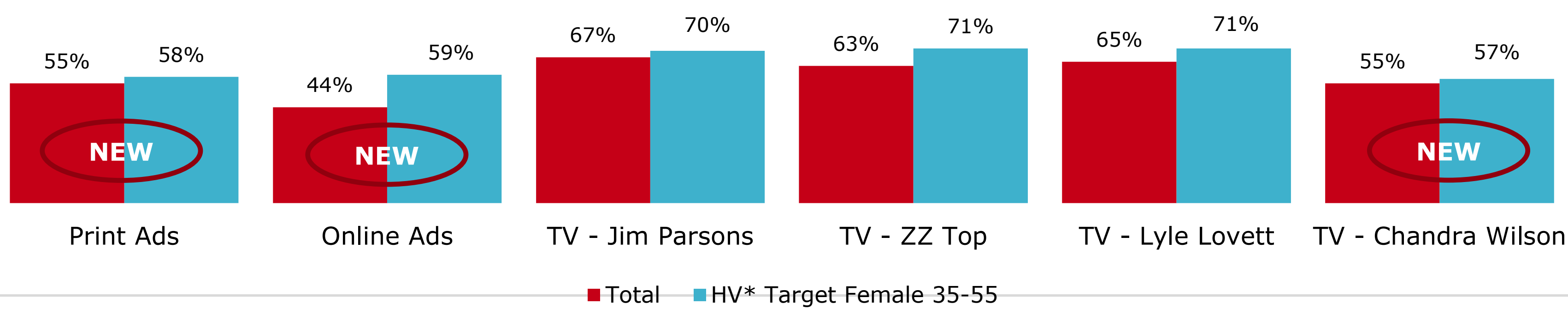
Key points *continued*

Excellent Ad Quality

- **The new ad creative (print and online) launched during this study. Therefore they did not have enough time to build a measurable awareness level. Despite this, ad recognition did appear in the results. Plus, visitor potential is there, as many note the ads positively impacted them.**



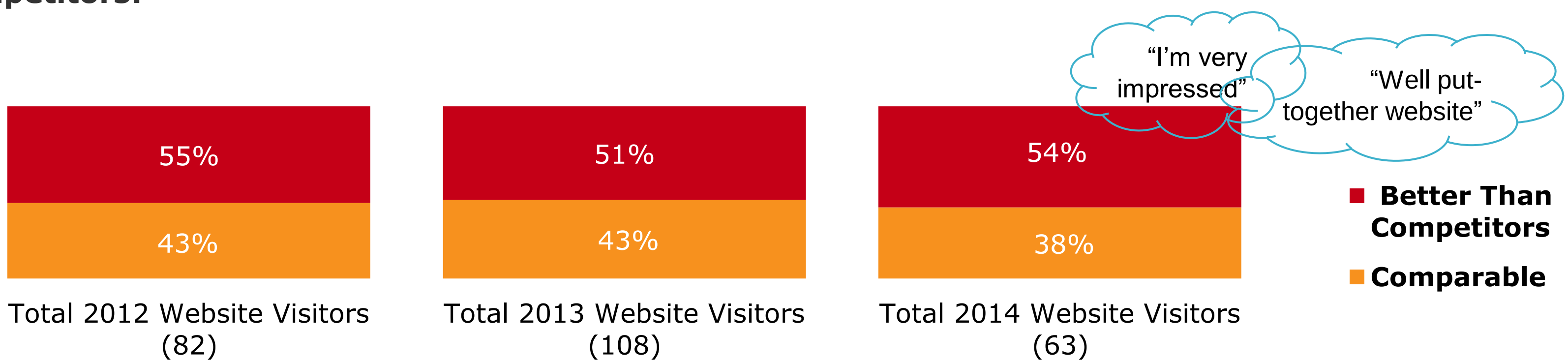
- **All ads generate high likeability and they especially please the core market:**



Key points *continued*

The Website Helps Promote Houston

- **Users of the Greater Houston CVB Website consider it superb. A majority thinks it is better than competitors:**



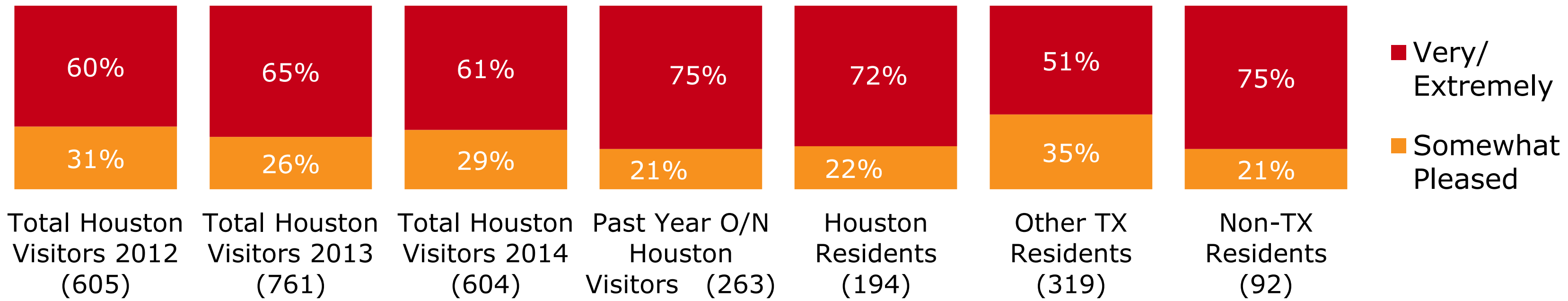
- **The website delivers, with three-quarters or more saying they agree with … :**

Good Impression of Houston	Effectively Describes Attractions, etc.	Well Organized	Good Balance Video/ Text	Good Contact Info	Helps Choose Attractions, Events, etc.	Communi-cates Houston's Qualities	Easy to Use	Useful Maps	Helpful Suggestions & Tips
83%	79%	79%	79%	78%	76%	76%	75%	75%	75%

Key points *continued*

Satisfaction with Overnight Leisure Trip to Houston

- **Houston generally satisfies its visitors, which helps build a strong "word-of-mouth," whether literally, online (blogs, recommendations), or via social media. Texans outside of Houston have historically been more critical, perhaps viewing their own Texas city as superior.**



Comments regarding Houston

- Travelers often commend Houston as a travel destination, but avidly complain about the ***weather, traffic,*** and ***safety***. Supportive comments center around its ***diversity, attractions*** (museums, zoo, pro sports, shopping, entertainment, etc.), and ***food***.

Comments regarding Houston: 2014

Negative	Positive
"A lot of traffic and crazy drivers"	"I didn't know that there was so much to do in Houston"
"Driving in Houston sucks"	"You will never have the excuse that there is nothing to do or eat!"
"Anyone forced to visit Houston must pray it does not include Interstate/Highway driving except 1 – 5 AM"	"A good place to visit in Fall, Winter, Spring; never in Summer"
"Cultural yes; affordable no"	"BEATS THE HELL OUT OF DALLAS"
"Dangerous"	"Fishing, country BBQ, outdoor festival in summertime"
"Far too many people; no interest to EVER visit Houston; horrible climate too"	"The food –WOW – food BBQ, seafood, gourmet, and more"
"Hot, dirty, a traffic mess, and dangerous"	"Great city"
"City full of death and danger, ugly, overcrowded, smells of oil refineries, a disgusting place"	"Great for music"
"Full of rude drives, poor downtown parking, disregard for all traffic laws; place to go by necessity, never by choice"	"Great sights, great arts, diverse culture"
"Is as expensive as New York and LA"	"Something for every age, diverse food, many museums, interesting city"
"Full of rude, incompetent people/drivers can't read or obey traffic signs"	"Beautiful large city with lots of surrounding areas to visit – a dog track, Galveston beaches, restaurants; a lovely area"
"I lived there for five years – it's dirty with a lot of crime and drugs"	"Fast-paced, energetic place"
"I would enjoy it more if it weren't such an ugly city and even more humid than Austin or Dallas"	"Better-than-average travel destination; museums are great, music scene is alive; hotels and restaurants are good-to-excellent"
"The highway system is horrible"	"Enjoy the comedy clubs, sporting events and parks"
"Lousy weather; too humid and hot!"	"Zoo, museums, parks – the zoo is above average and the Museum of Natural History is almost un-rivaled"
"Polluted, congested, not enough "nature" things to do"	"I LIKE THE FOOD"
"Stay away from Houston unless you want to get shot or car hit by uninsured"	"I often have visitors; my saving grace is the Space Center – it's so unique"
"While I love those people in the commercials, Houston's traffic sucks, crime sucks, smog sucks, and drivers are horrible"	"I moved to Texas for its safety, outdoor activities, friendly people, and generally healthier, happier lifestyle"
"Worst town in Texas to visit"	"Like the Jim Parsons ad best for the emphasis on the museum district"

Q32. Please share below any additional comments you may have regarding Houston, TX as a travel destination?

2
Detailed Findings

3
The Landscape

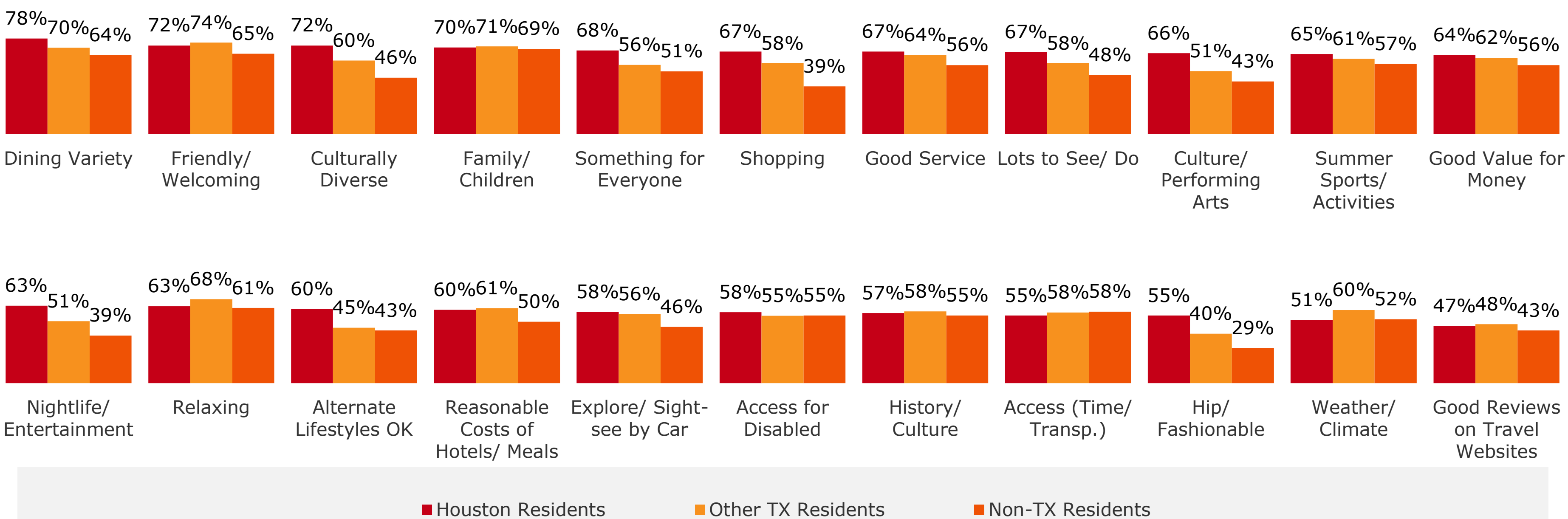
Topics:
How Houston compares to other cities
View of Houston: Residents vs. others
Progress over time

Cities "good to visit" for non-resident visitors

A destination's own residents can be its best ambassadors.

Houston's populace often views Houston as above average, compared to other cities by their residents. They see Houston as an ***active urban playground***, well-above average for ***dining, cultural diversity, something for everyone, shopping, lots to see/do, culture/performing arts, nightlife/entertainment, alternative lifestyles***, and ***hip/fashionable.***

Attribute Description of City by Residents (% Top 2 Box)
Ranked by Houston Residents

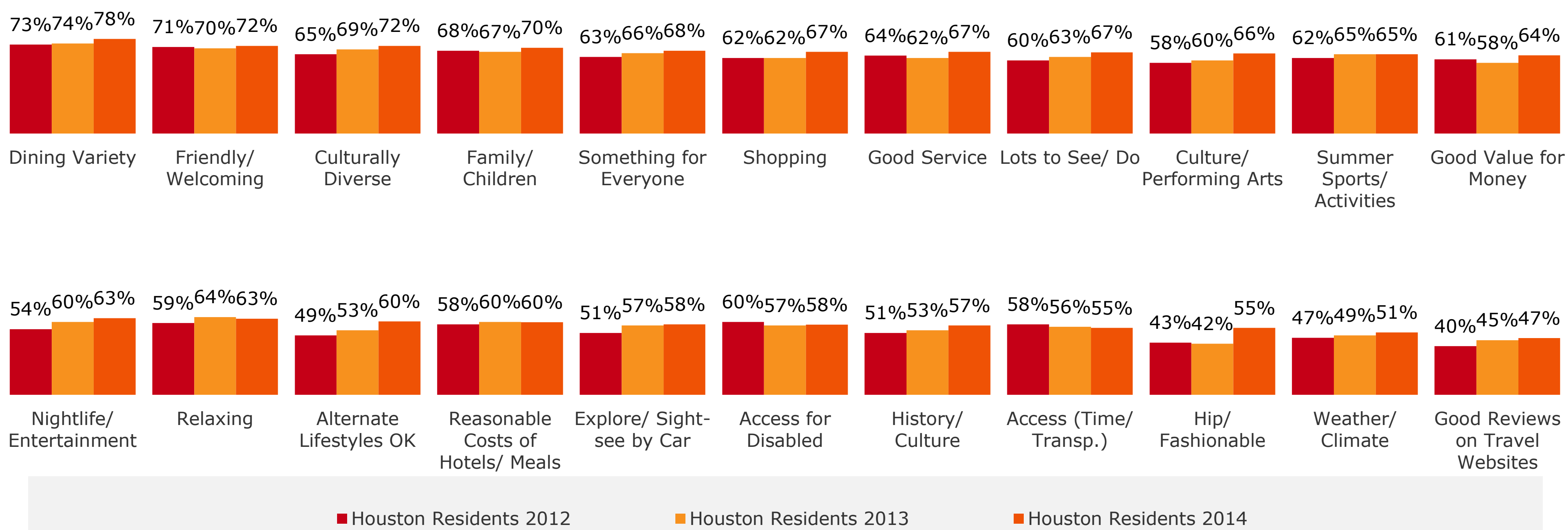


Q3. Thinking about the city where you live, how well does each statement describes your city as a leisure destination for those who do not live there (5 point scale).

Houston “good to visit” trends

Over time, Houston residents see their city as increasingly entertaining ***(lots to see/do, culture/performing arts, nightlife/entertainment)*** and tolerant ***(alternate lifestyles, culturally diverse)***.

Attribute Description of Houston (% Top 2 Box)
Ranked by Houston Residents

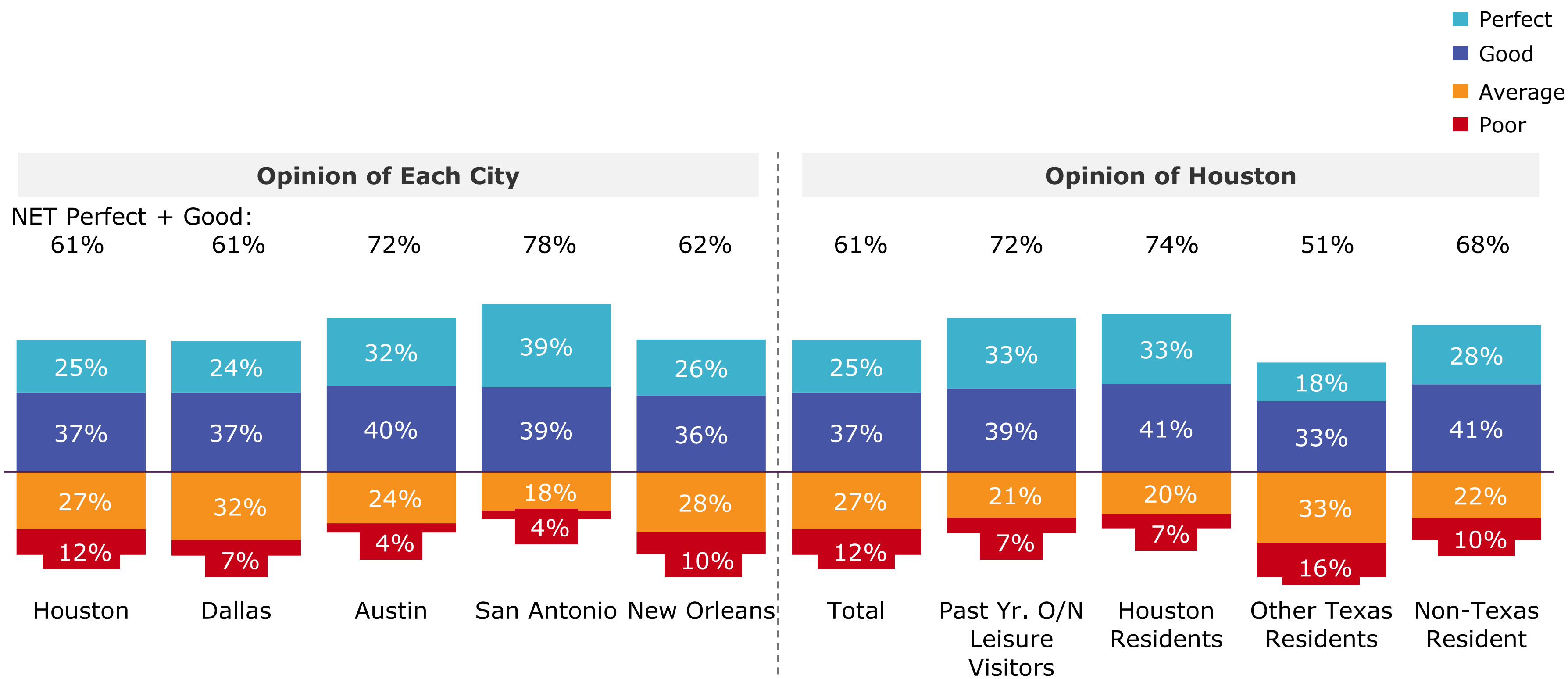


Q3. Thinking about the city where you live, how well does each statement describes your city as a leisure destination for those who do not live there (5 point scale).

Quality of cities as destinations

San Antonio continues to set the standard for "everything you look for in a leisure destination." Meanwhile:

- Houston, Dallas, and New Orleans vie for third place after Austin
- Non-Houston Texas residents view Houston most critically.

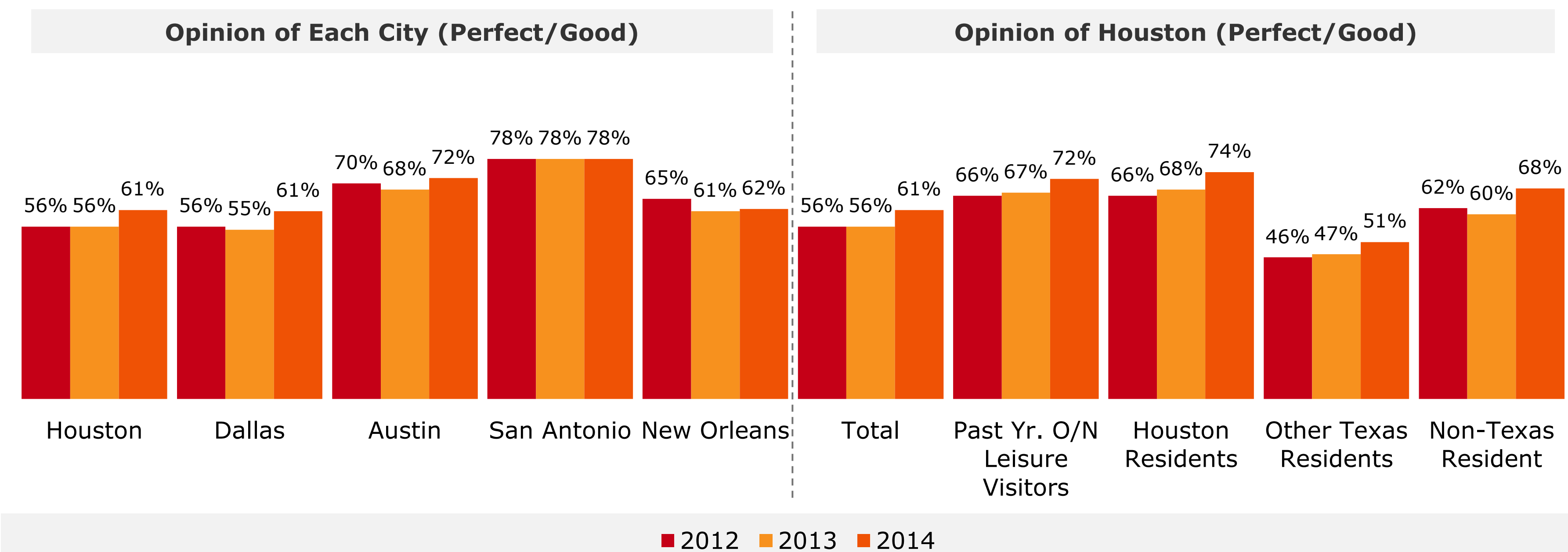


Q4. Now, please rate each city, whether or not you live there or have visited it, taking into account everything you look for in a leisure destination (10-point scale).

Quality of cities as destinations - trends

When thinking of “everything you want in a leisure destination,” travelers:

- View San Antonio as static, albeit at a high level
- **Grant higher marks to both Houston and Dallas,** making them competitive with **New Orleans**
- **The opinion of Houston improves across-the-board, even among non-Houston Texas residents.**

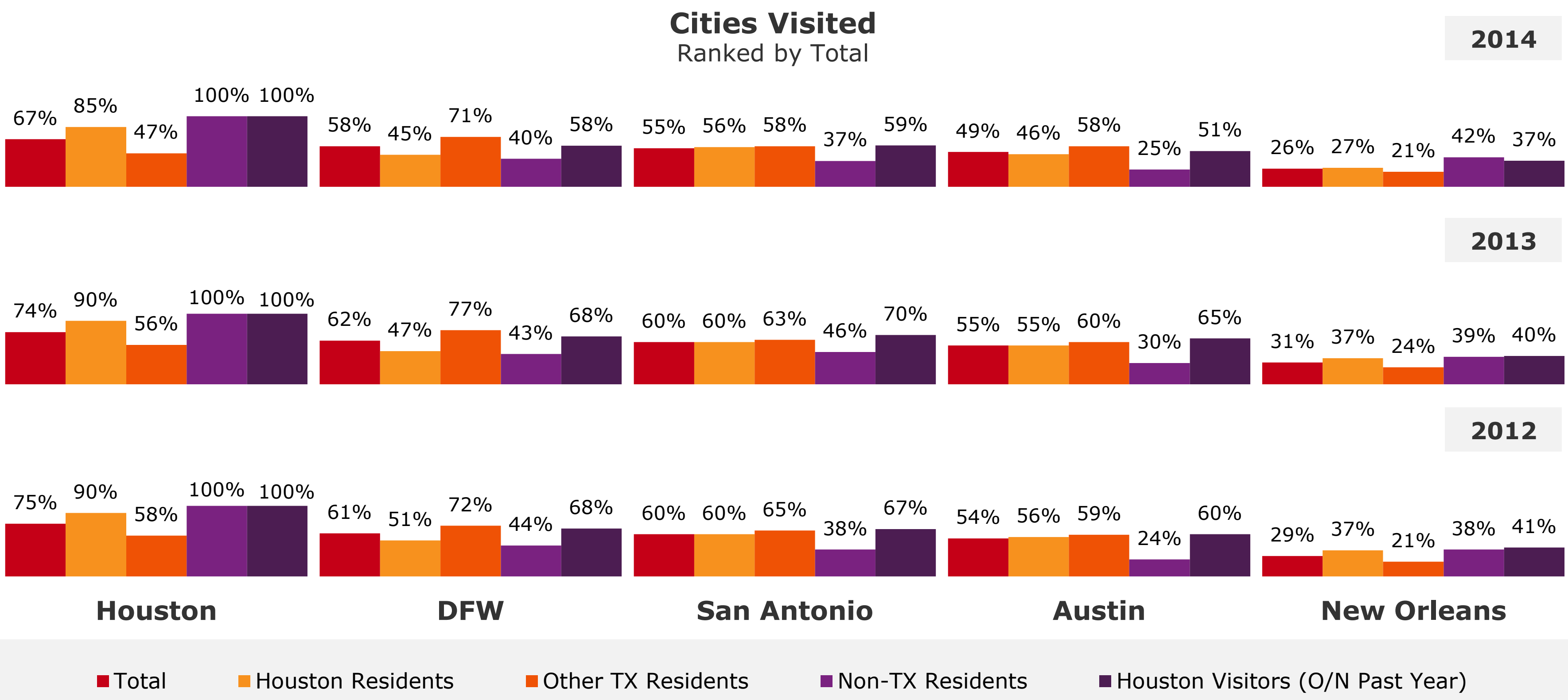


Q4. Now, please rate each city, whether or not you live there or have visited it, taking into account everything you look for in a leisure destination (10-point scale).

Competitive cities visited

In a pattern similar to last year:

- Houston residents have greater interest in San Antonio than other shown destinations
- Past year (overnight) Houston visitors have nearly equal interest in Dallas and San Antonio
- New Orleans is more popular among Non-Texas residents.

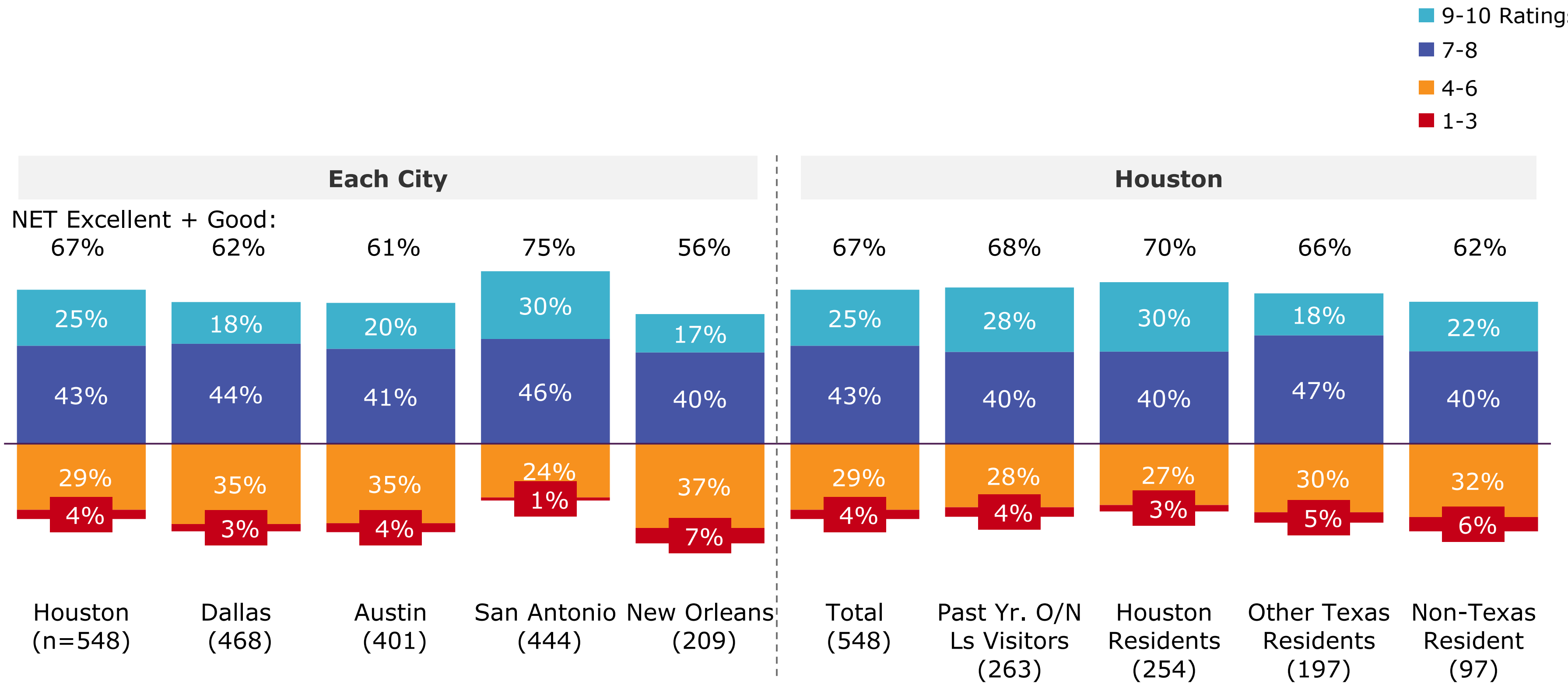


Q5. Which of the following cities have you visited in the past 5 years?

Value for the money - cities as destinations

Overall, visitors view Texas cities as destinations with *good value for the money*:

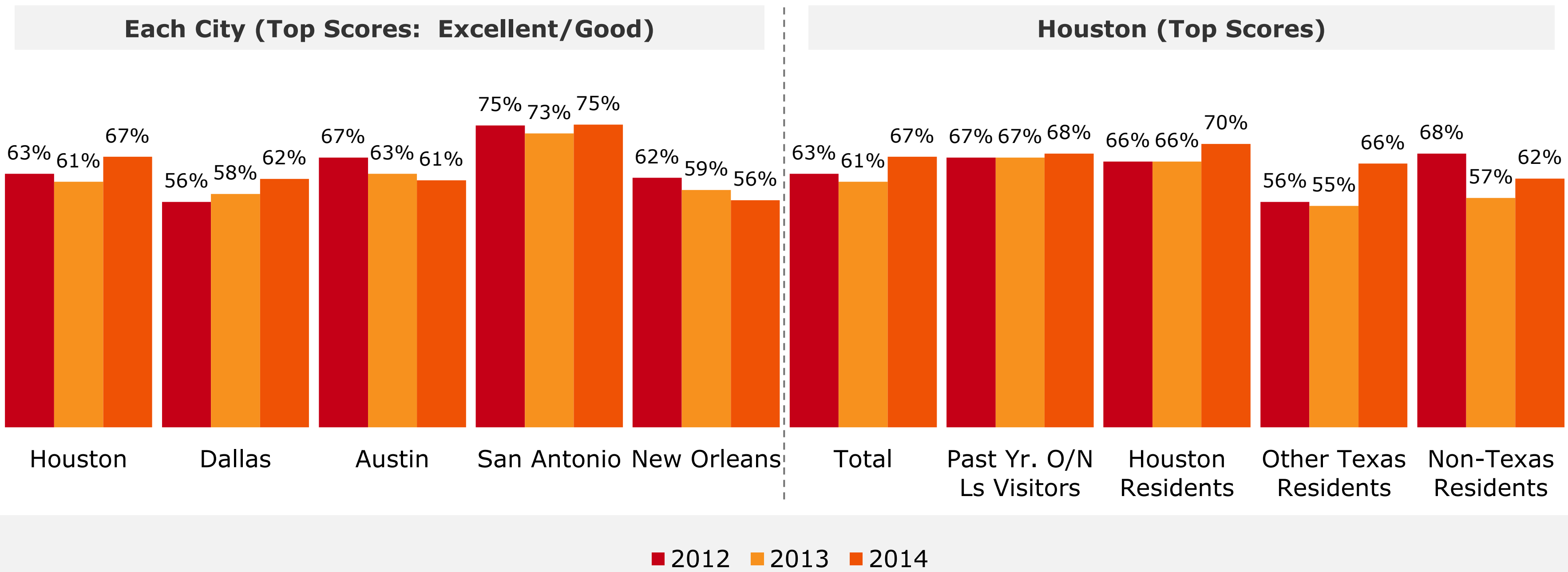
- San Antonio takes the lead, **Houston ranks second**, and New Orleans trails
- Relatively little differentiation appears by residence.



Q6. How would you rate the value for the money of each city (10-point scale)?

Value for the money - cities as destinations

- Compared to last year, **Houston's** and **Dallas'** image on ***value for the money* improves** while Austin's and New Orleans' image declines.

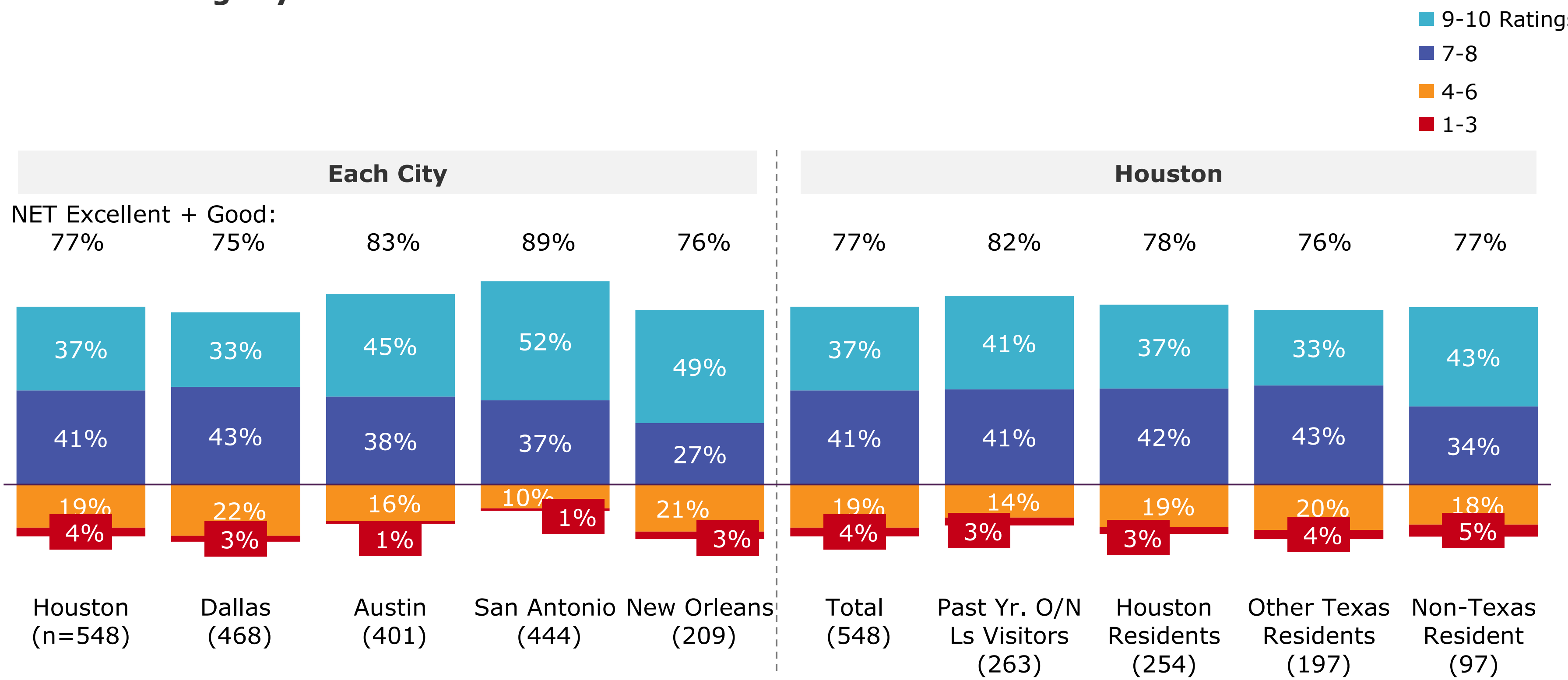


Q6. How would you rate the value for the money of each city (10-point scale)?

Experience in each destination city

San Antonio claims the lead as the city with the best *overall experience* for visitors while:

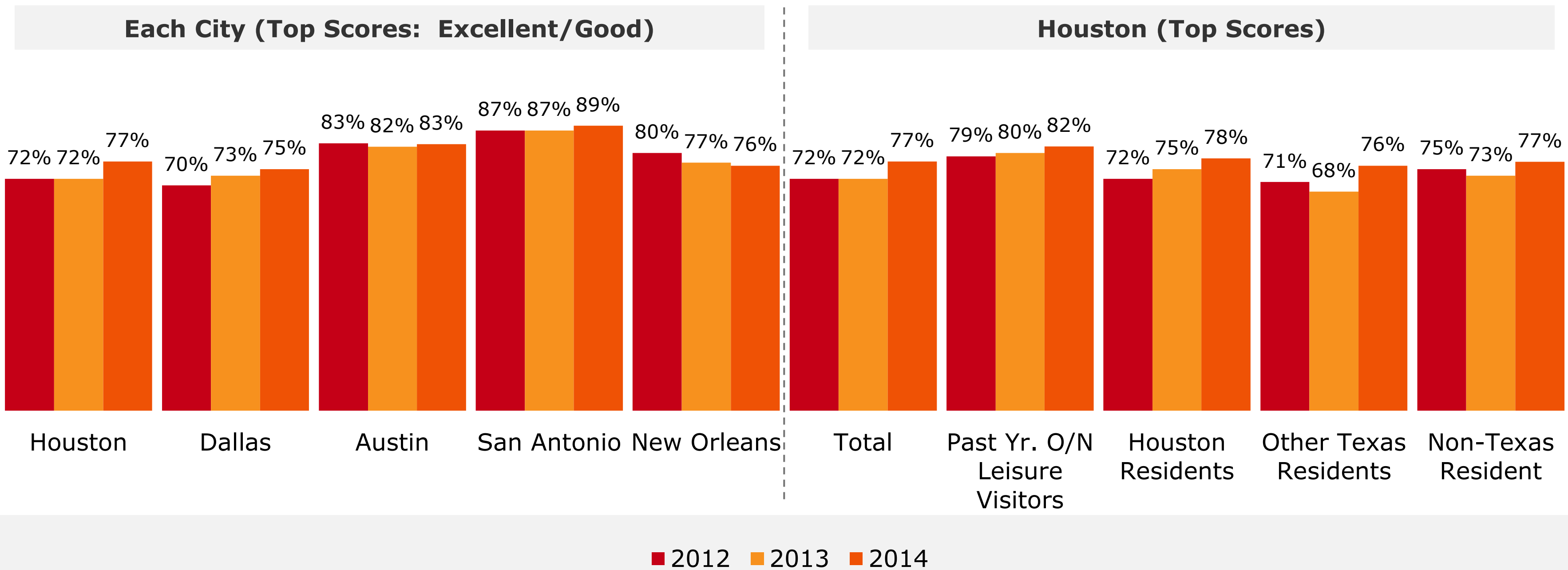
- For getting more of the highest (9-10 ratings), New Orleans nudges into second place
- **Houston slightly exceeds Dallas.**



Q7. Overall, how would you rate the experience you had in each city (10-point scale)?

Experience in each destination city

The *overall experience c*limbs by a wider margin in Houston (every category) than any other city.

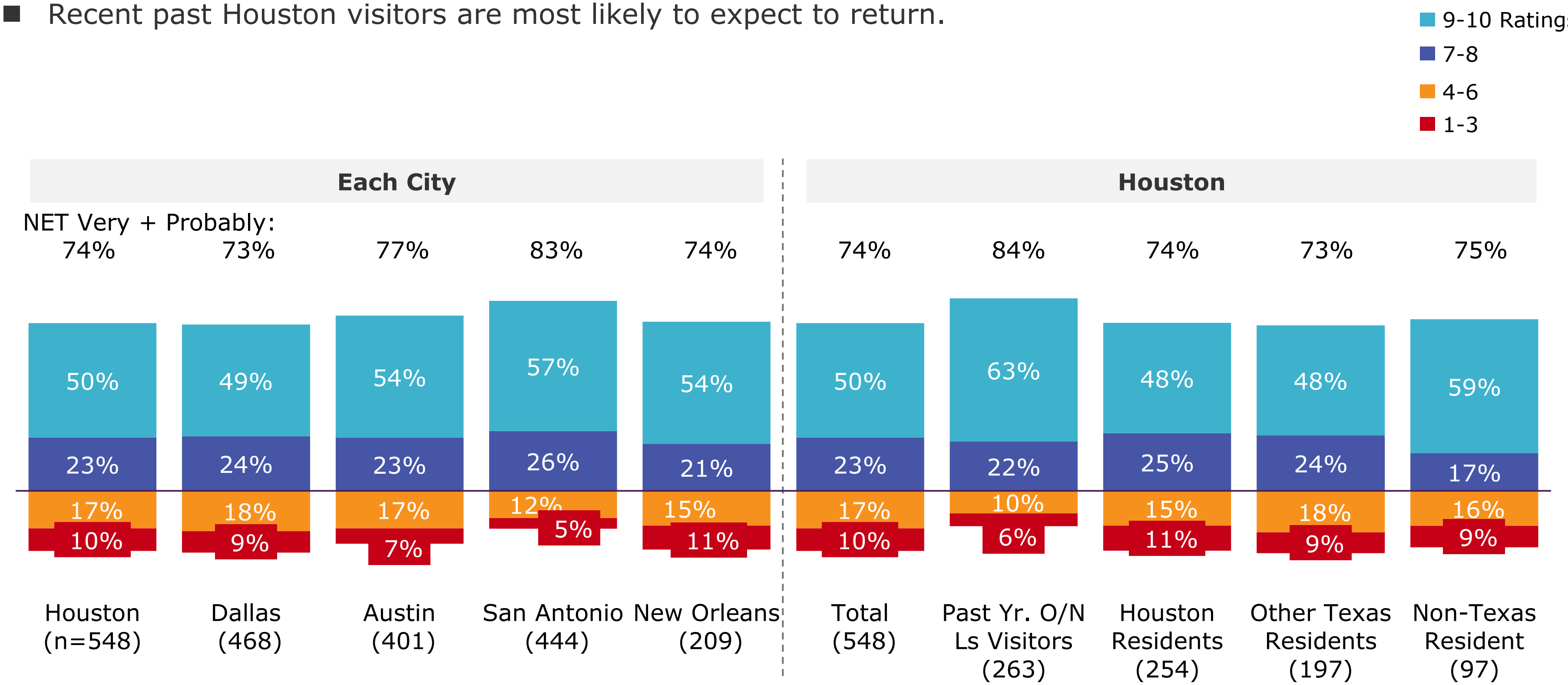


Q7. Overall, how would you rate the experience you had in each city (10-point scale)?

Likely to return to destination city

Visitors' *expected repeat visitation* varies somewhat by city:

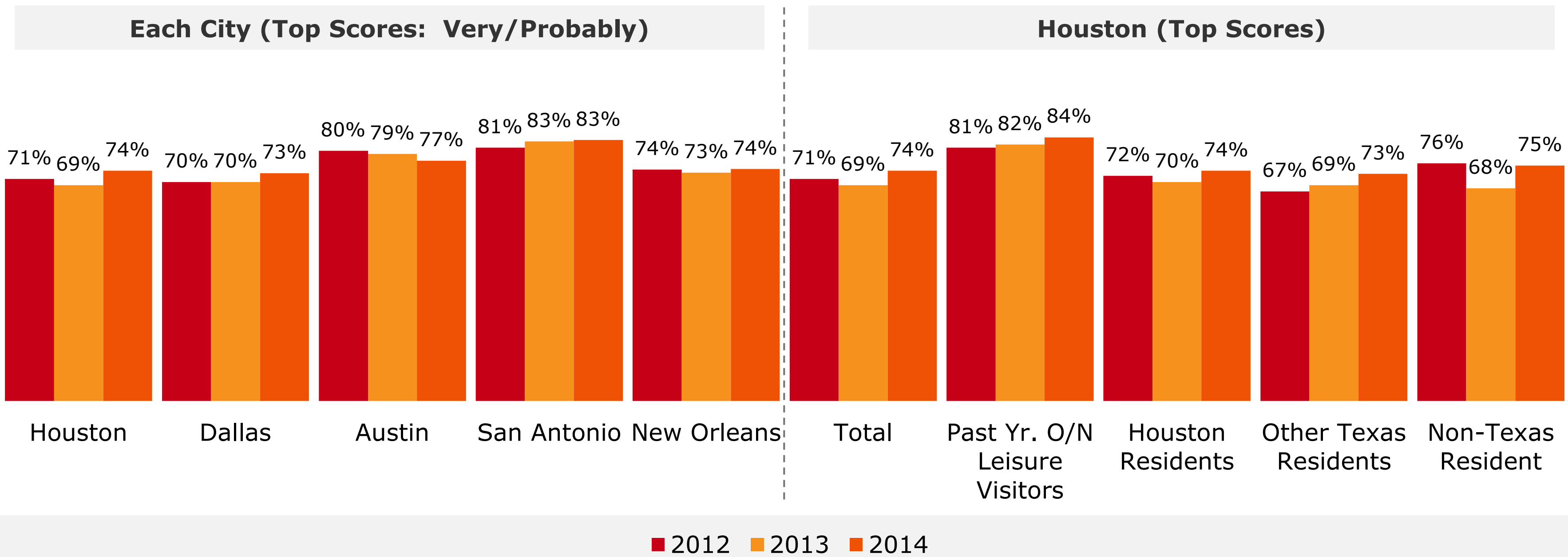
- San Antonio and Austin visitors have the highest expectations to return
- **Houston closely competes with Dallas and New Orleans**
- Recent past Houston visitors are most likely to expect to return.



Q8. How likely are you to return to each city for an overnight, leisure trip, if visited (10-point scale)?

Likely to return to destination city

Compared to last year, most cities lure about the same level of expected repeaters, with **Houston posting a 5% gain, lager than any other city.**

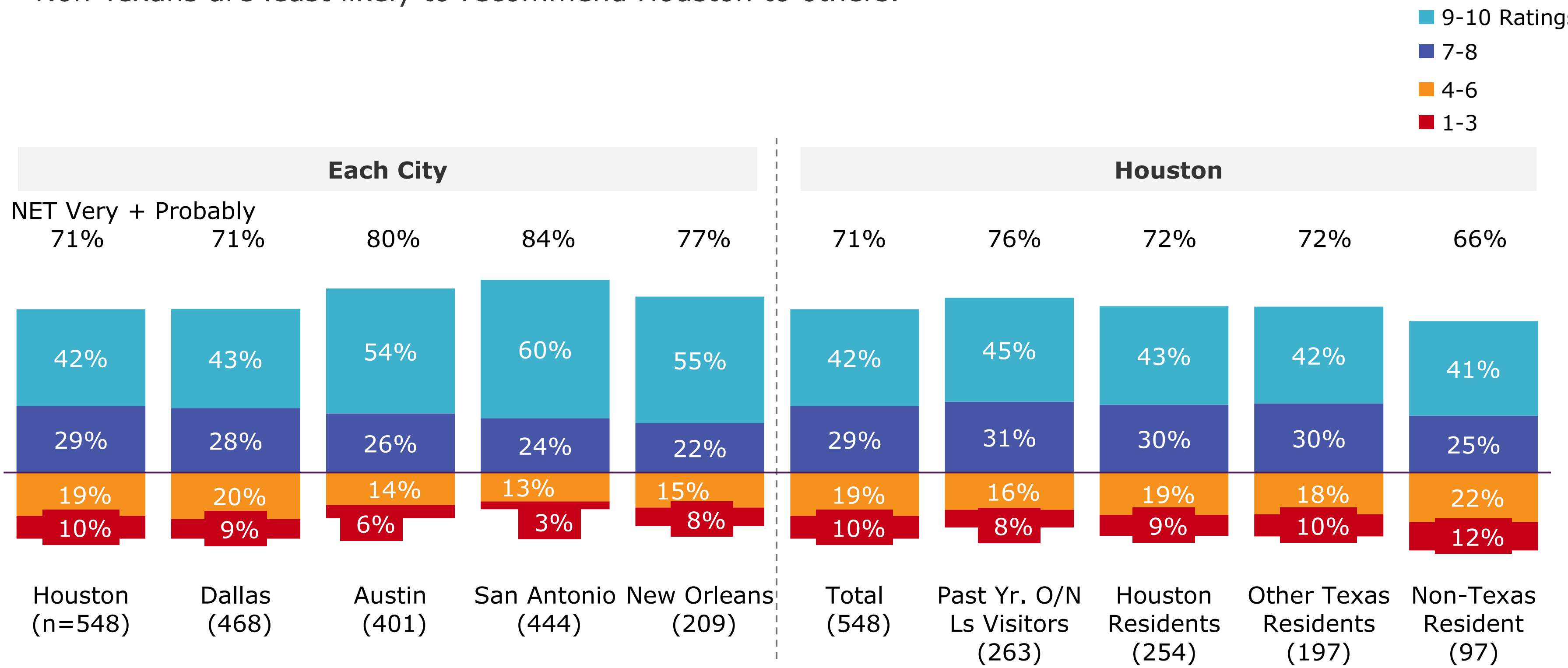


Q8. How likely are you to return to each city for an overnight, leisure trip, if visited (10-point scale)?

Likely to recommend city as destination

By city:

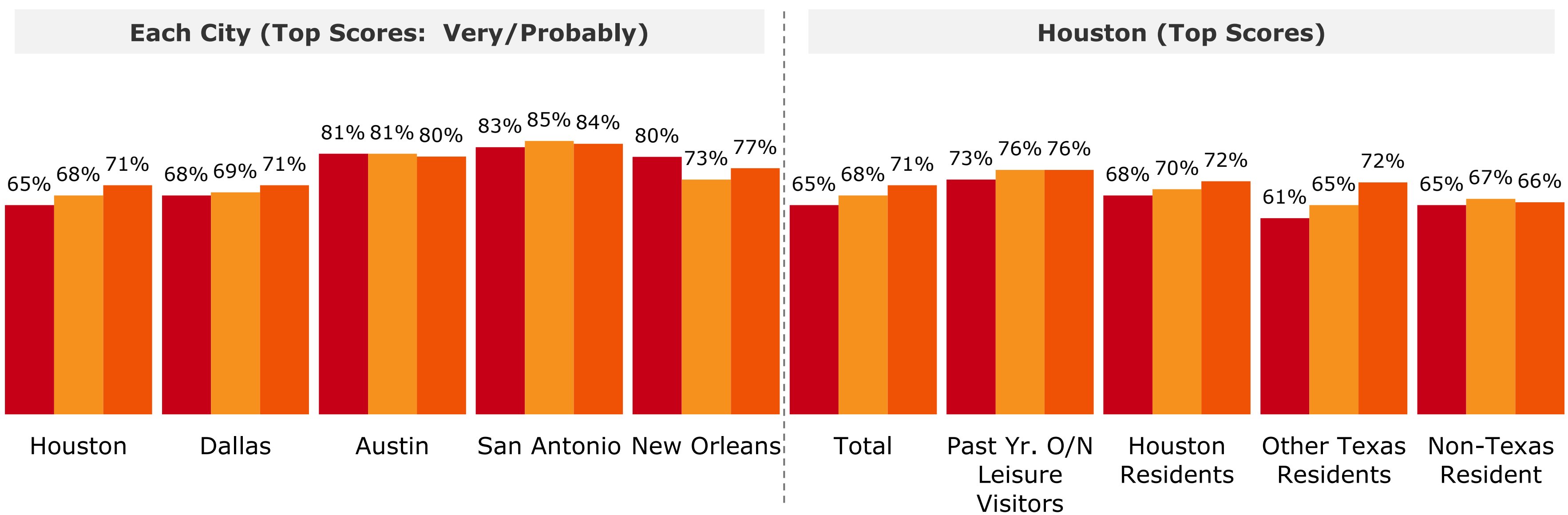
- San Antonio and Austin visitors would most likely recommend the city to friends/family
- **Houston ties Dallas**
- Non-Texans are least likely to recommend Houston to others.



Q9. How likely are you to recommend traveling to each city to friends/family (10-point scale)?

Likely to recommend city as destination

Recommendations hover near prior year levels, with **steady improvement for Houston** (particularly among non-Houston Texans) and Dallas.



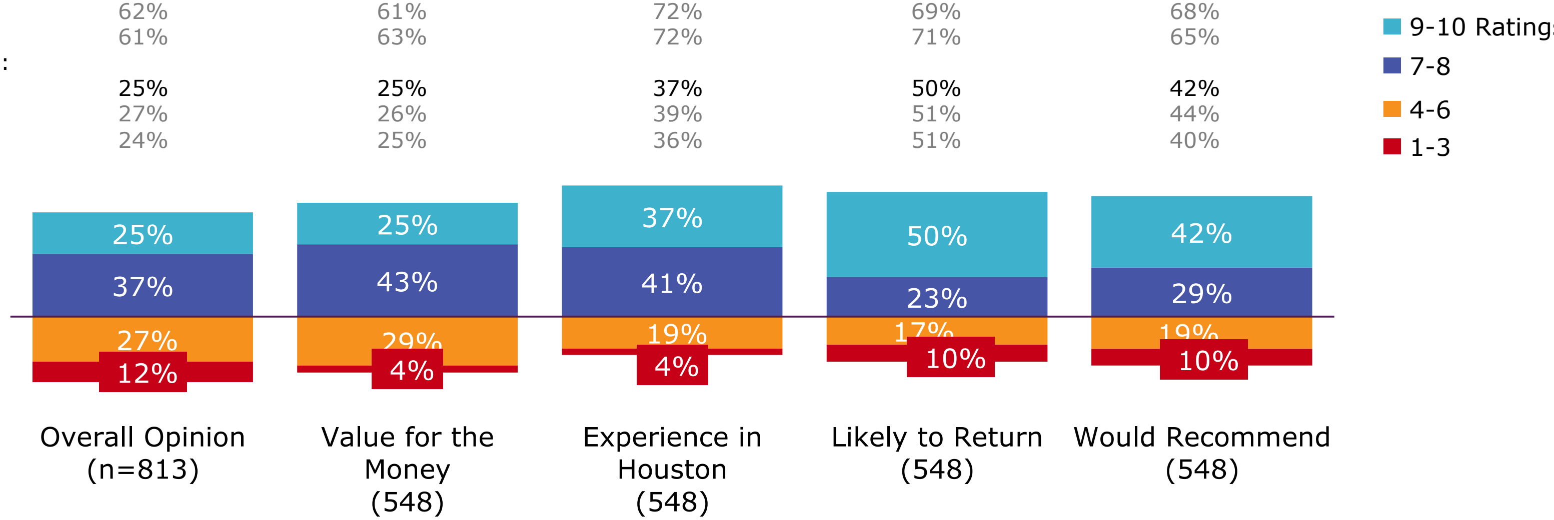
Q9. How likely are you to recommend traveling to each city to friends/family (10-point scale)?

Summary of opinions/ratings about Houston

Generally improving, the majority of Houston visitors praise the city, especially for providing a ***positive experience*** **(77% - up 5 percent from 2013).**

Houston (Visited in Past 5 Years)

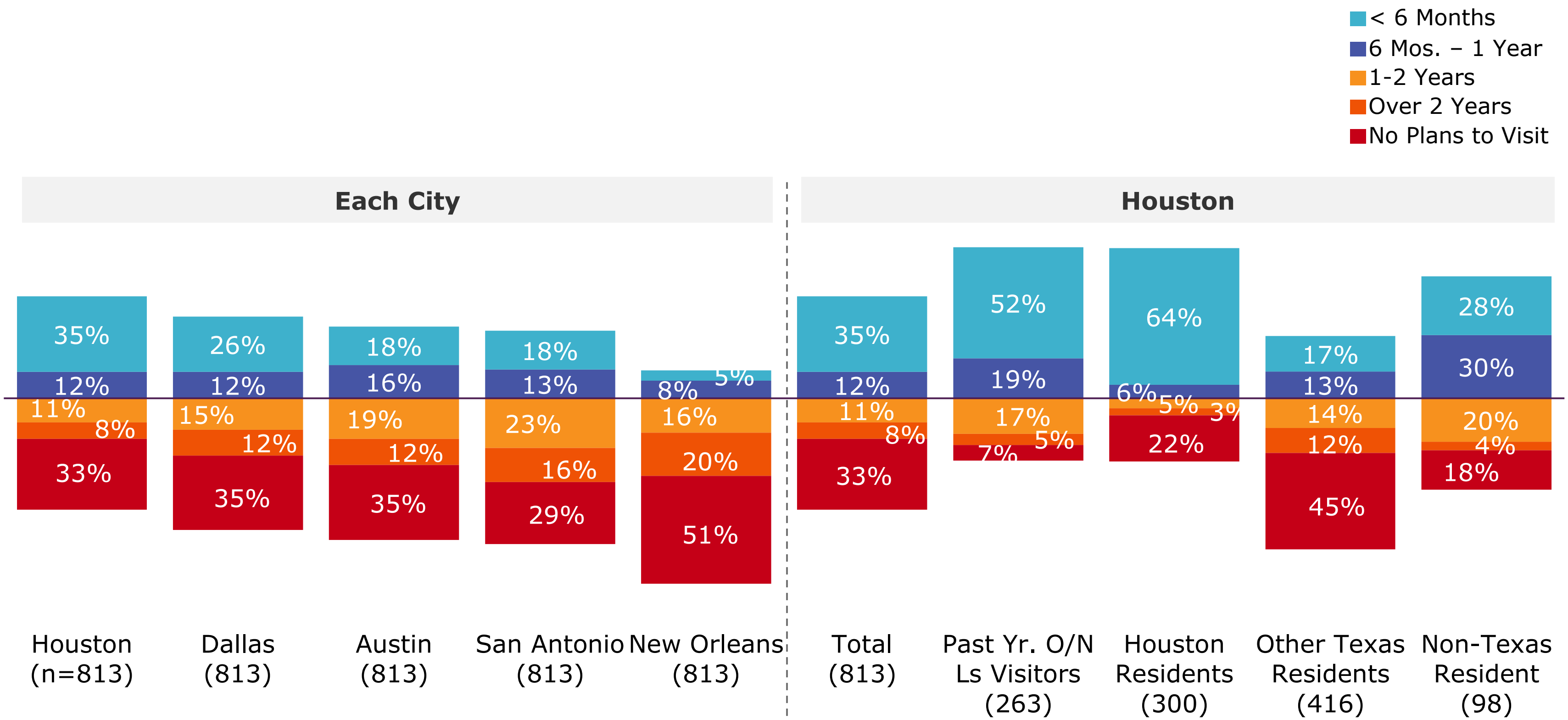
	Overall Opinion	Value for the Money	Experience in Houston	Likely to Return	Would Recommend
NET Top Four Ratings:					
2014	61%	67%	77%	74%	71%
2013	62%	61%	72%	69%	68%
2012	61%	63%	72%	71%	65%
NET Top Two Ratings:					
2014	25%	25%	37%	50%	42%
2013	27%	26%	39%	51%	44%
2012	24%	25%	36%	51%	40%



Q4. Now, please rate each city, whether or not you live there or have visited it, taking into account everything you look for in a leisure destination (10-point scale).
Q6. How would you rate the value for the money of each city (10-point scale)?
Q7. Overall, how would you rate the experience you had in each city (10-point scale)??
Q8. How likely are you to return to each city for an overnight, leisure trip, if visited (10-point scale)?
Q9. How likely are you to recommend traveling to each city to friends/family (10-point scale)?

Next future visit to city

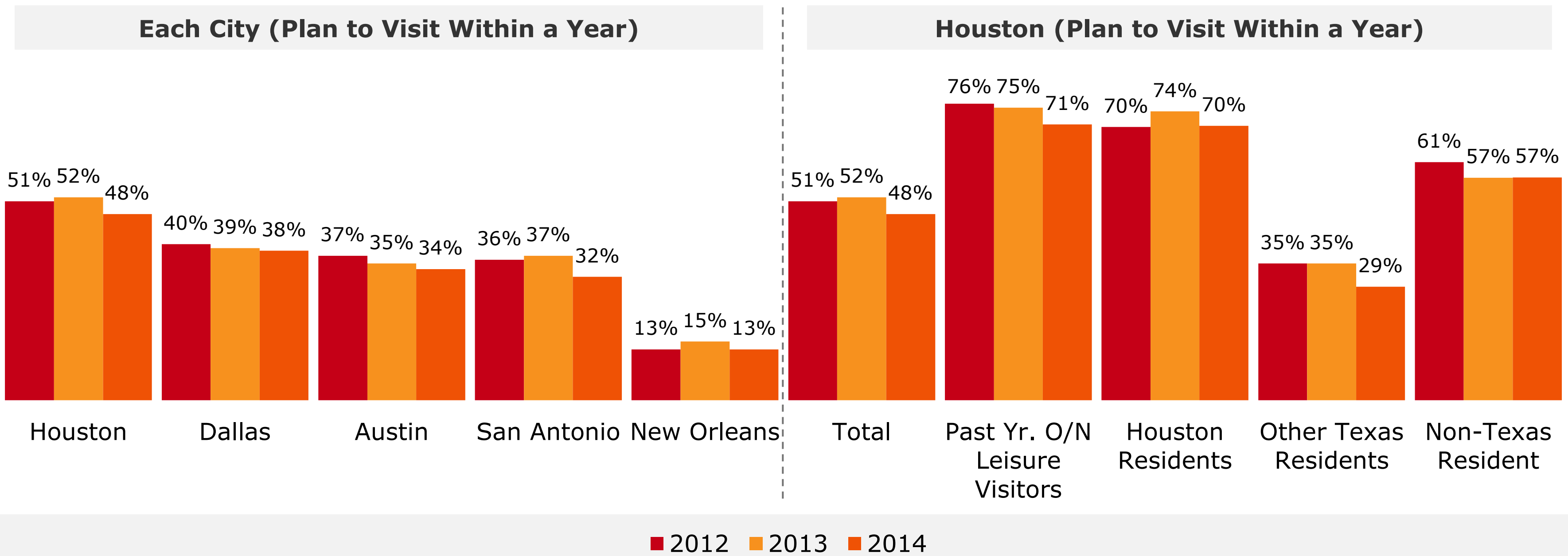
Houston maintains its lead over other cities as a place to **visit within the next year**, with ***past visitors*** and ***residents*** showing the greatest interest.



Q10. Please indicate the next time you plan to visit each of the following cities (10-point scale)?

Next future visit to city

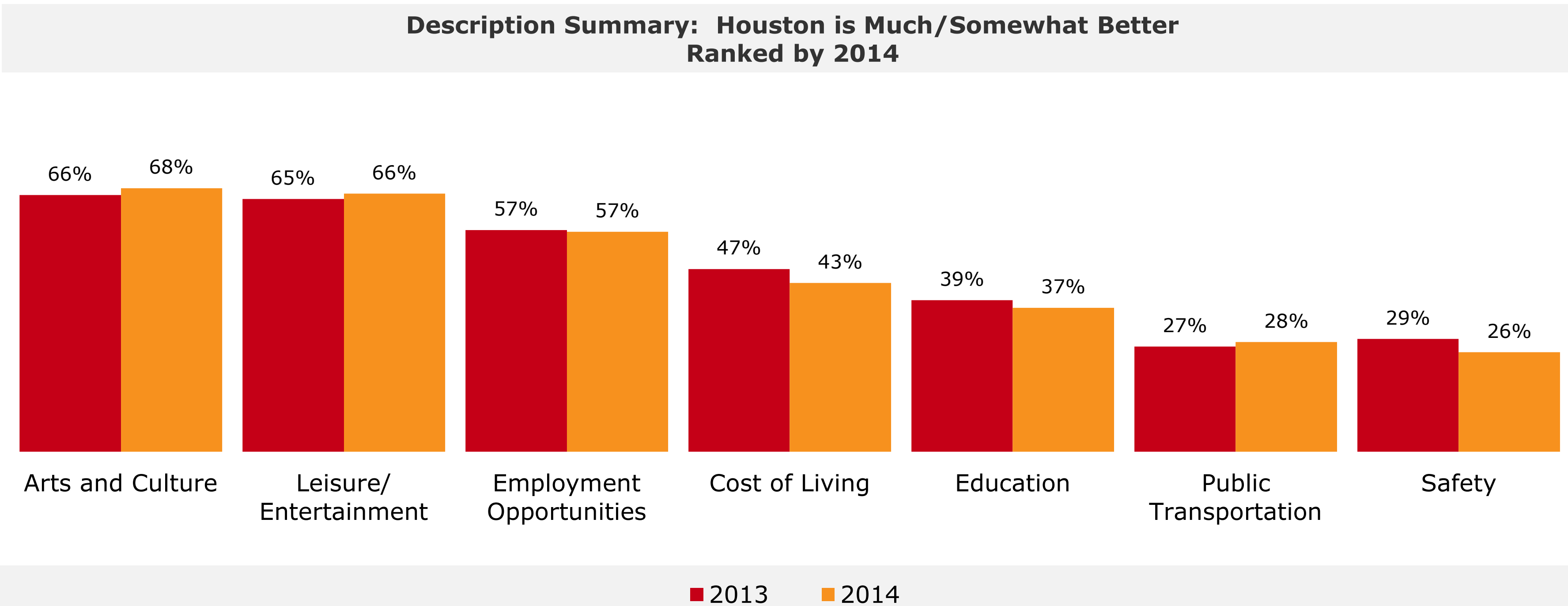
Every city slips a bit from last year.



Q10. Please indicate the next time you plan to visit each of the following cities (10-point scale)?

Houston vs. other cities: Summary Table

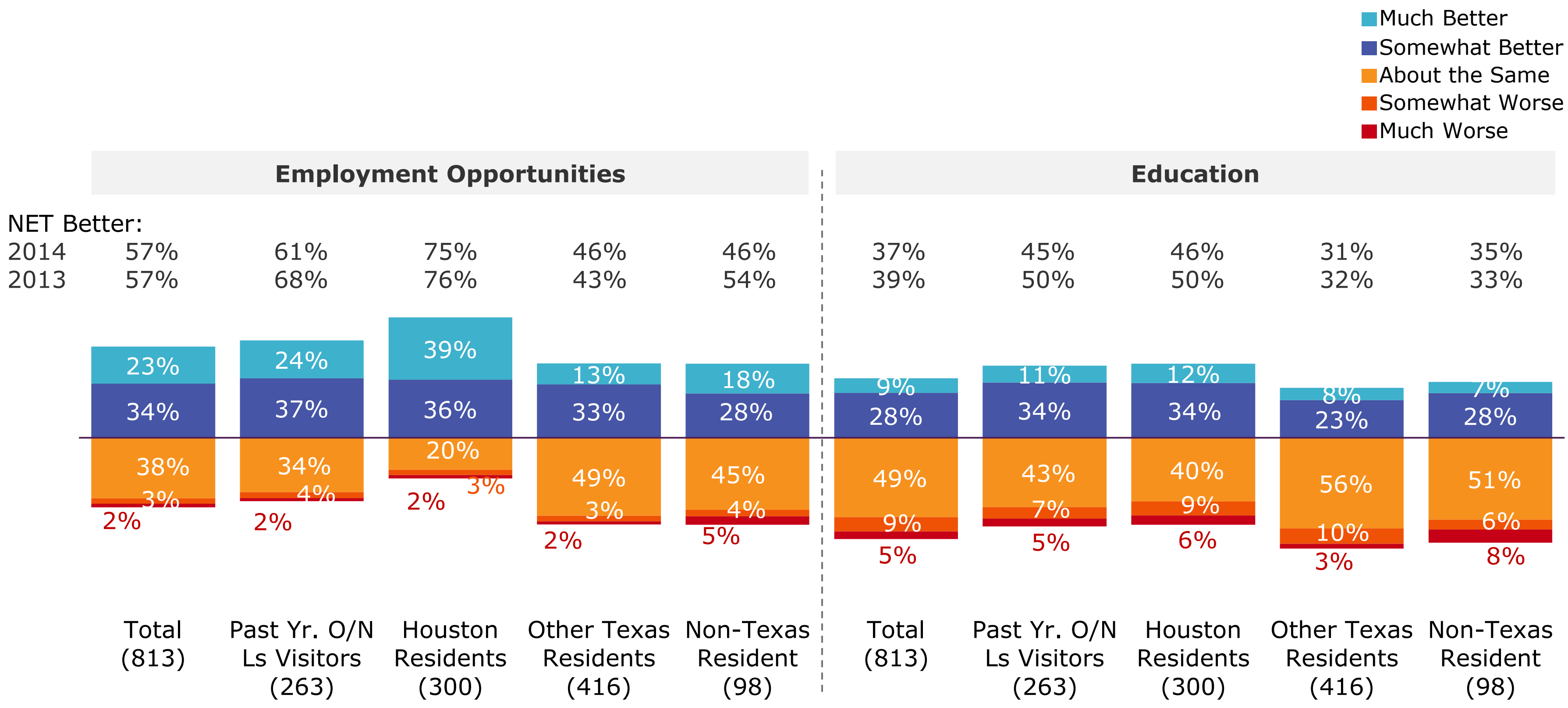
Houston receives its highest praise, compared to other cities, for ***Arts/Culture, Leisure/ Entertainment,*** and ***Employment Opportunities***.



Q41. How well does Houston compare to other cities in the US on the following characteristics (5-point scale)?

Houston vs. other cities

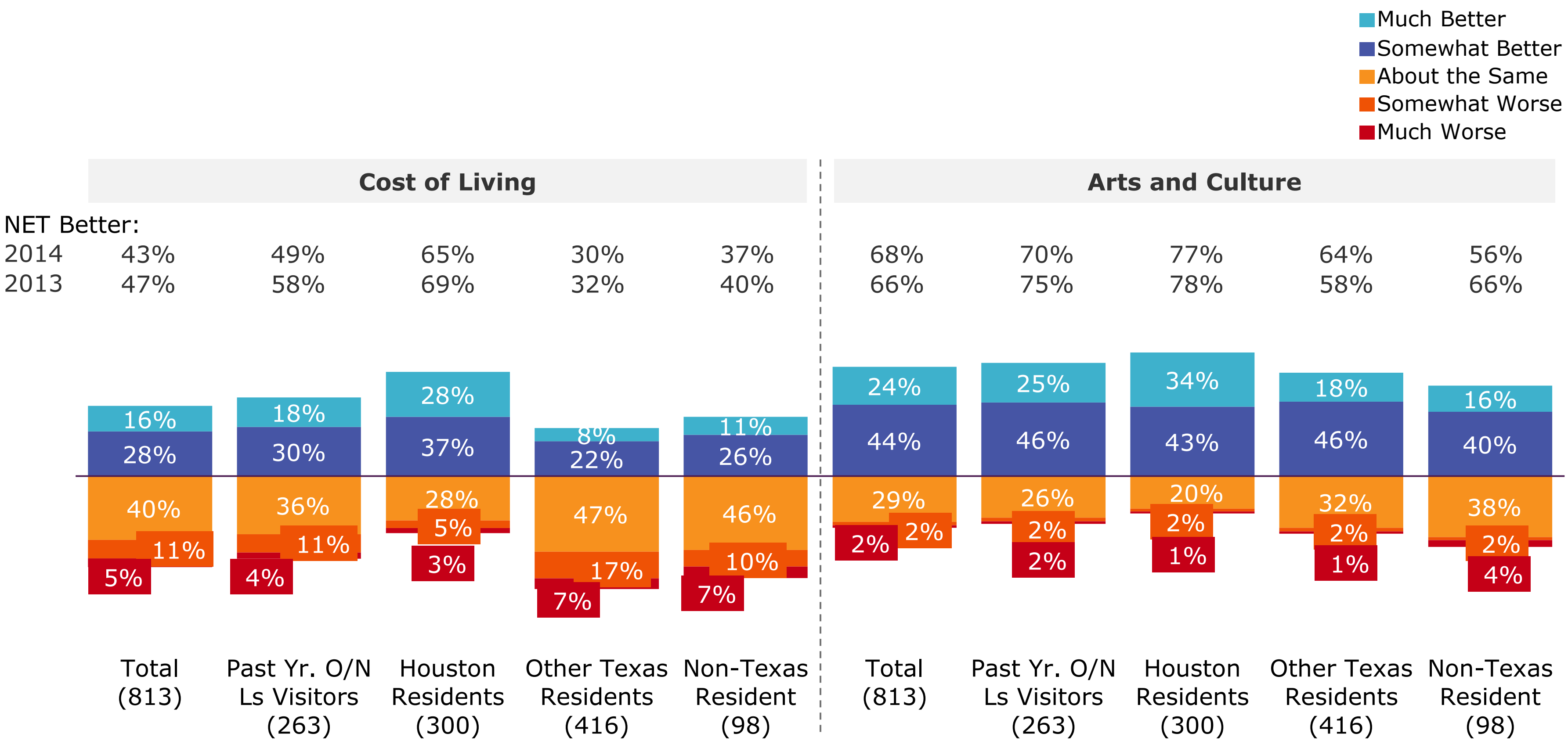
Far more Houston residents view Houston as a place with better ***employment opportunities***, but the gap narrows for ***education***.



Q41. How well does Houston compare to other cities in the US on the following characteristics (5-point scale)?

Houston vs. other cities

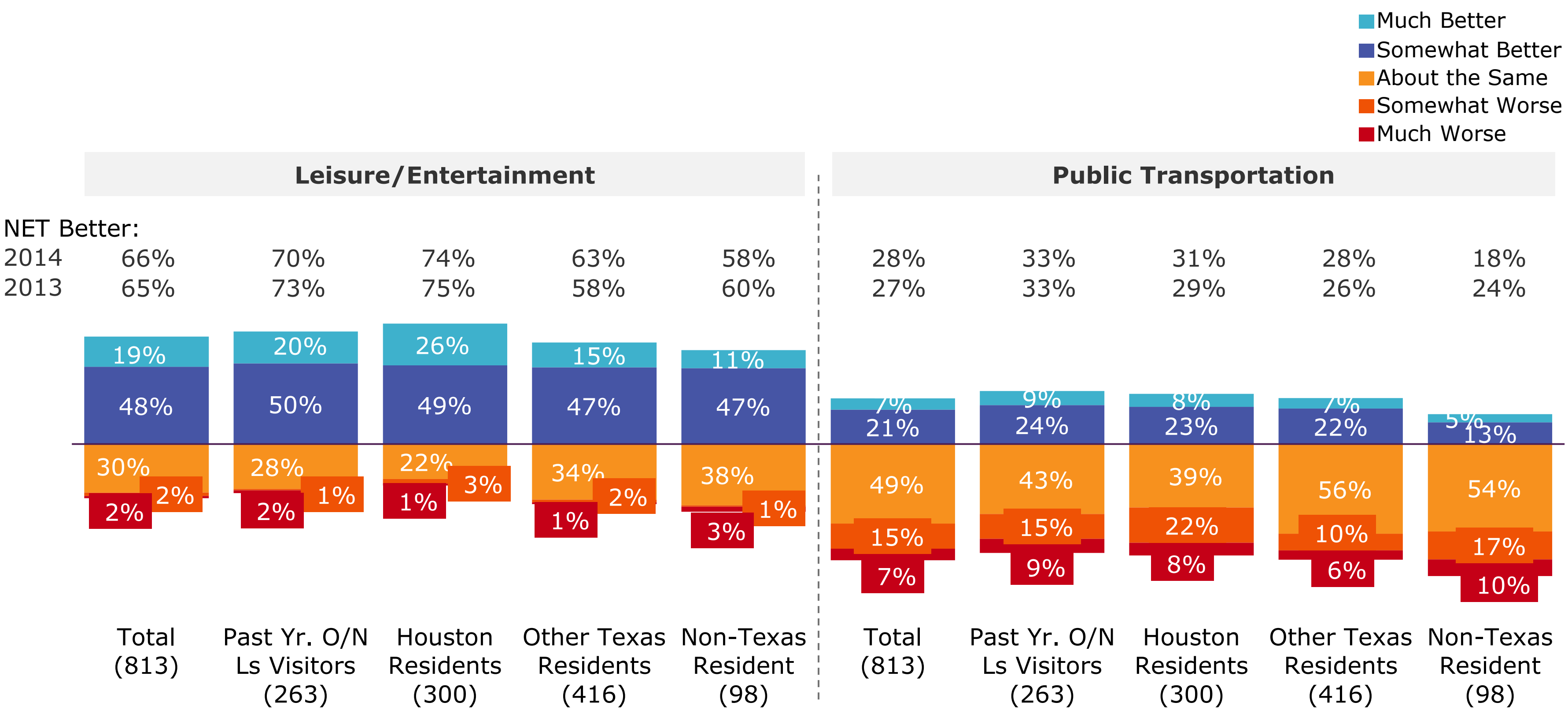
Houston receives very high marks for ***arts and culture*** while perceptions of its ***cost of living*** varies greatly (much higher among those with greater familiarity).



Q41. How well does Houston compare to other cities in the US on the following characteristics (5-point scale)?

Houston vs. other cities

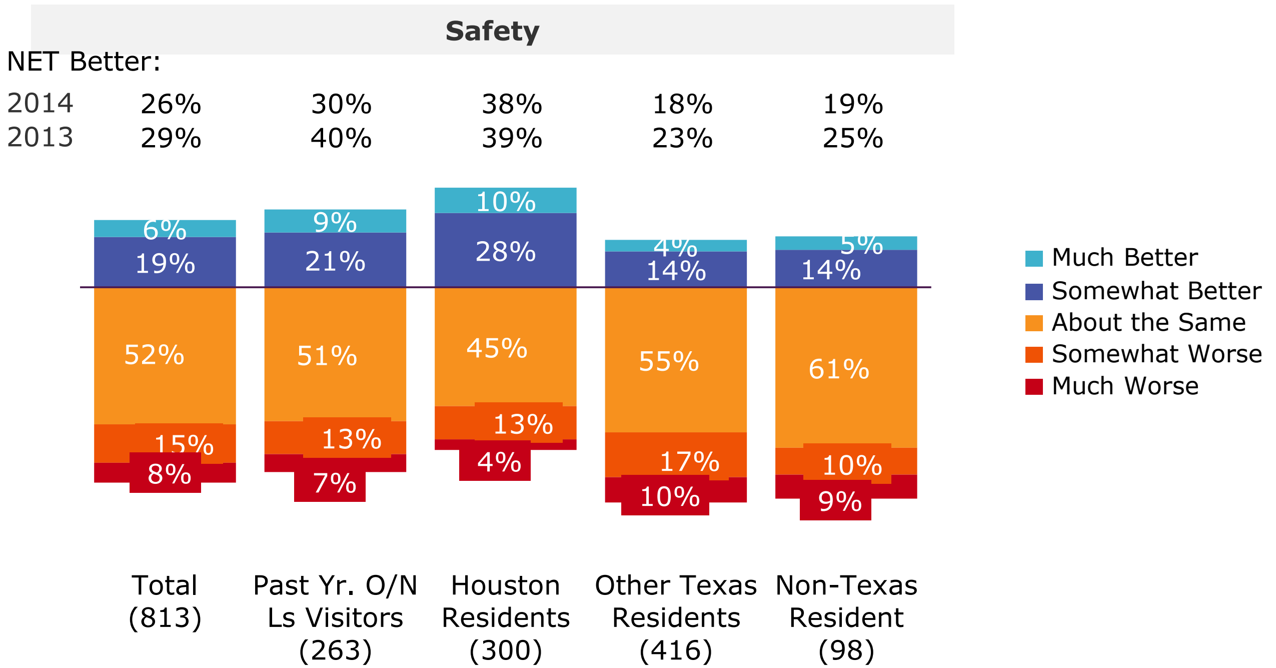
Similar to arts and culture, Houston receives high praise for ***leisure and entertainment;*** but most view its ***public transportation*** as less competitive.



Q41. How well does Houston compare to other cities in the US on the following characteristics (5-point scale)?

Houston vs. other cities

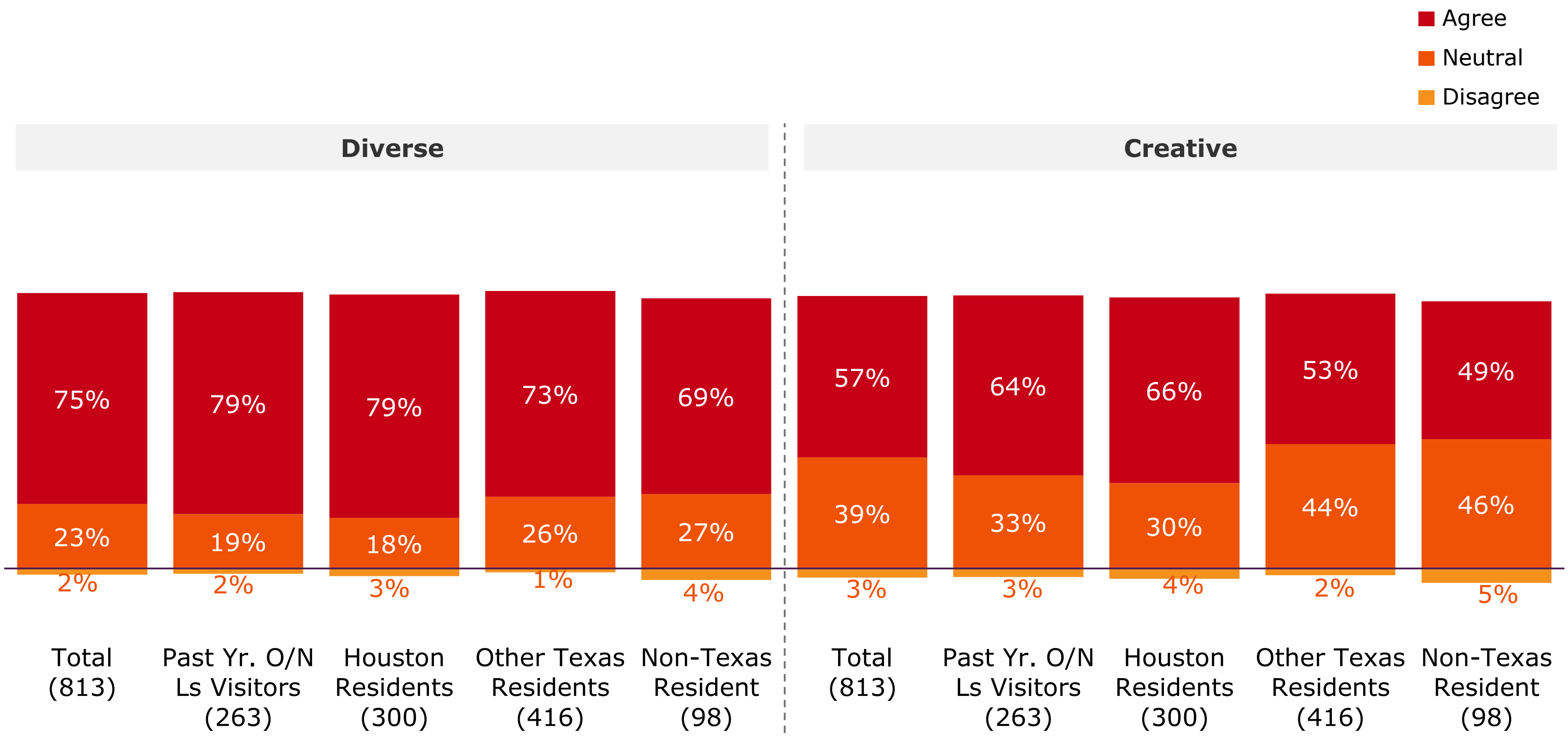
Safety places below other characteristics.



Q41. How well does Houston compare to other cities in the US on the following characteristics (5-point scale)?

Houston descriptions

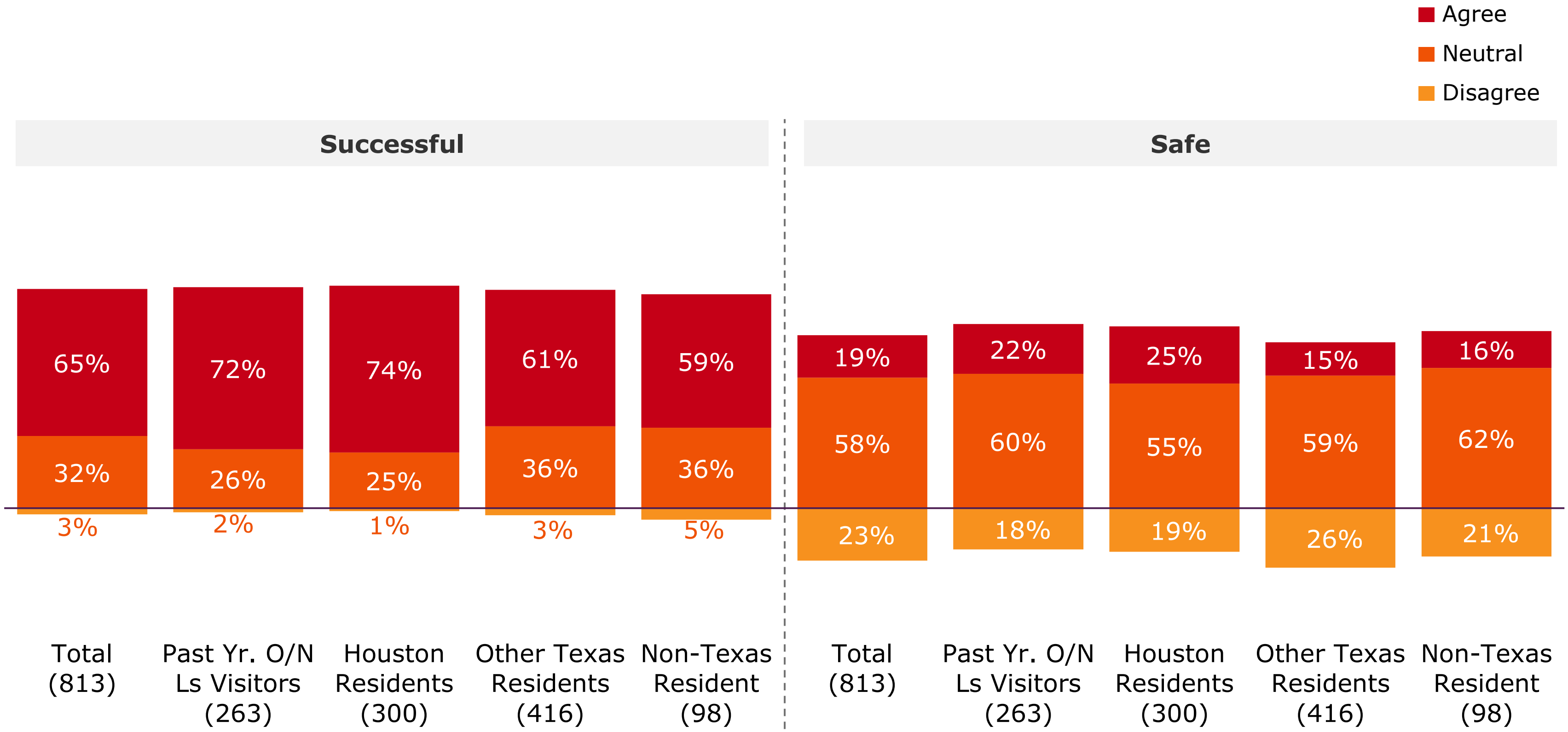
The majority agree that Houston is ***diverse*** and ***creative***.



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions

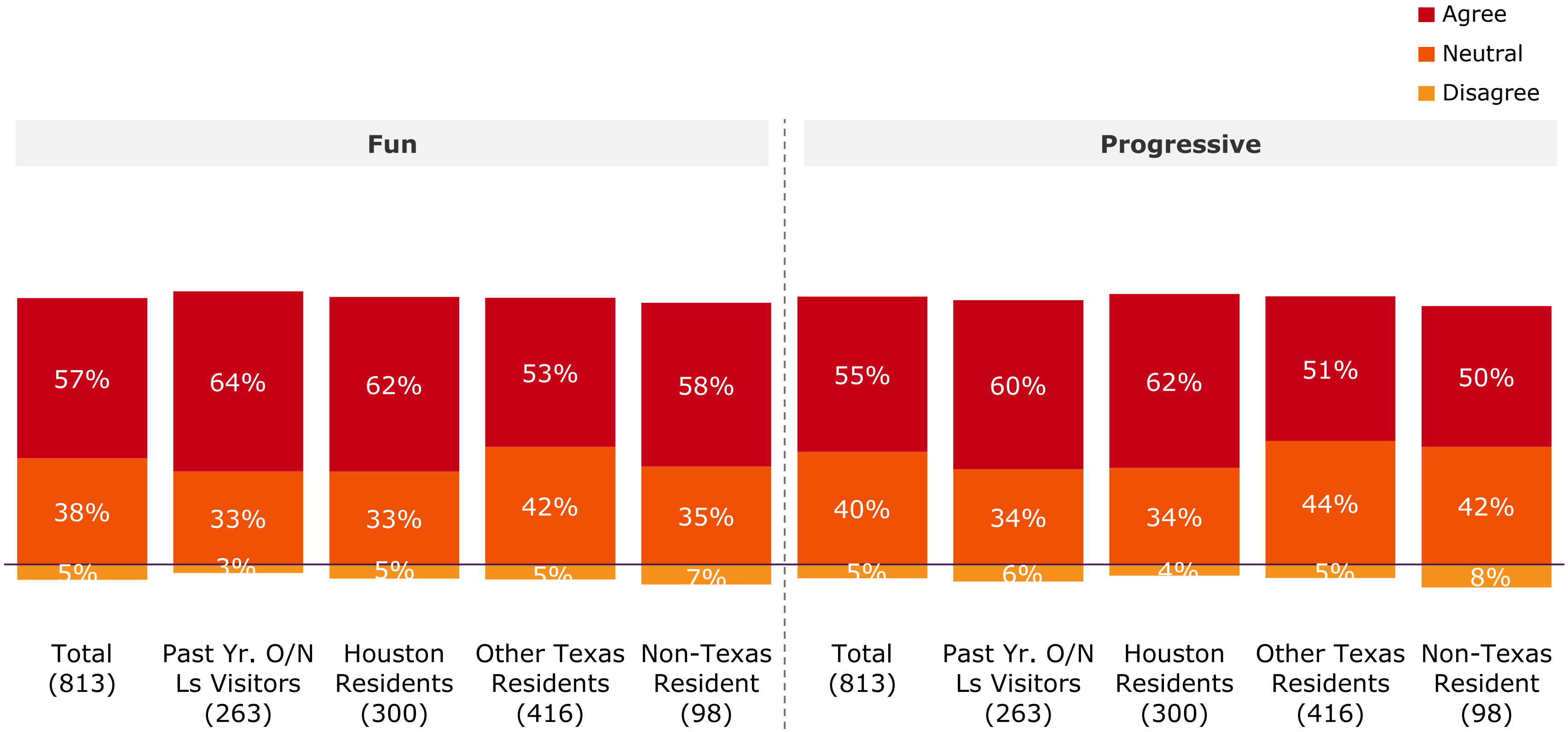
Most also view Houston as ***successful,*** but ***safety*** lags most other measures.



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions

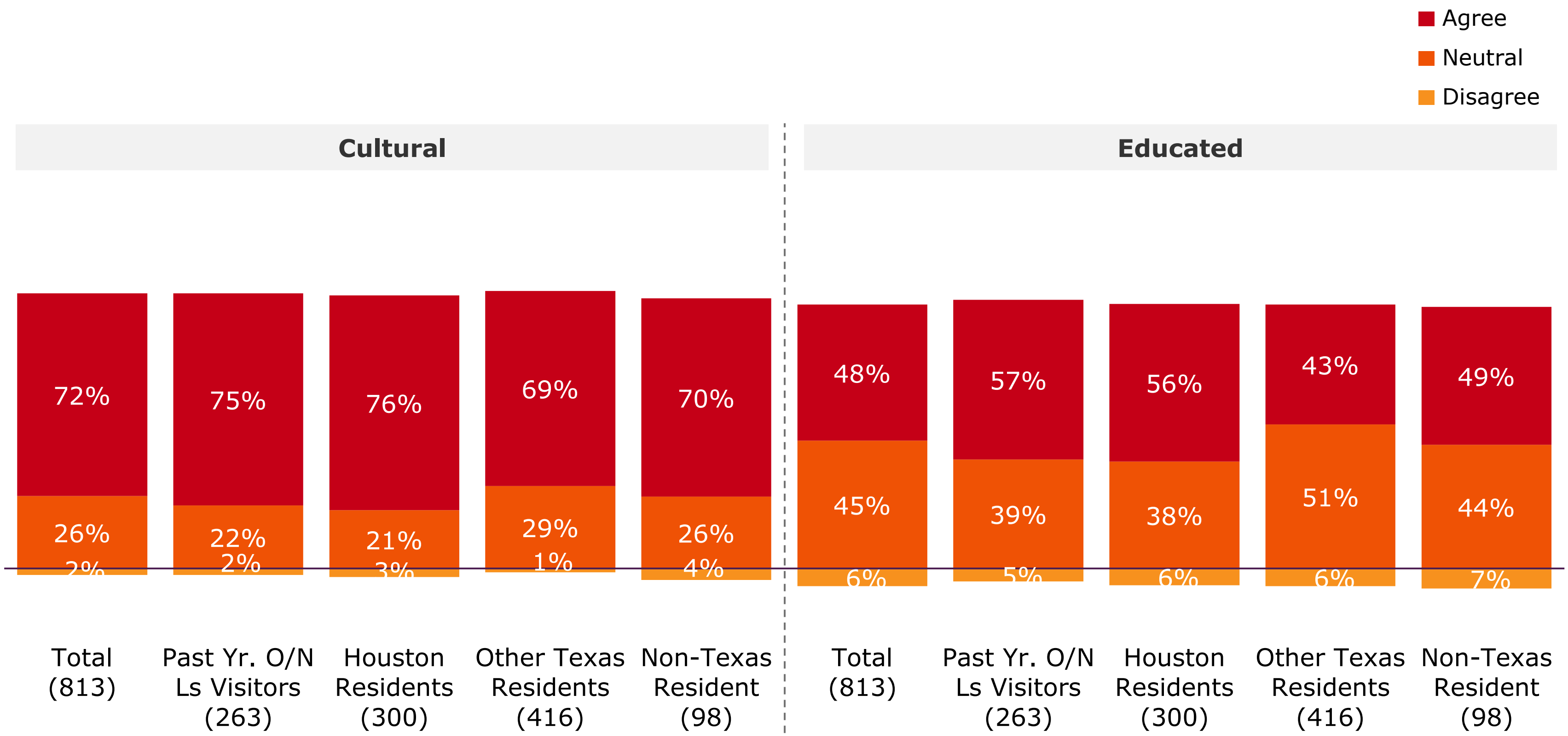
Travelers generally deem Houston as ***fun*** and ***progressive***.



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions

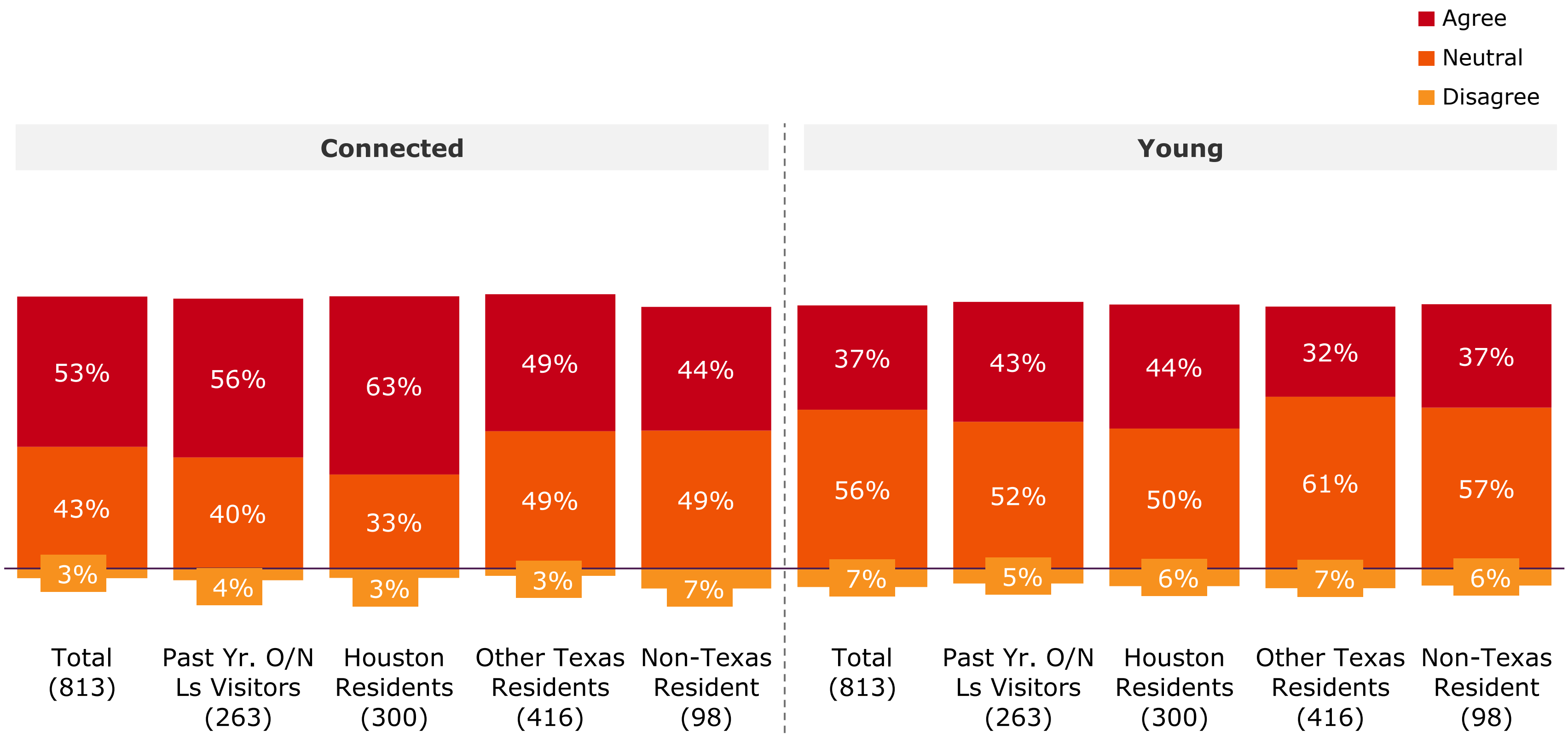
Particularly strong as a ***cultural*** center, most think of it as ***educated*** as well.



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions

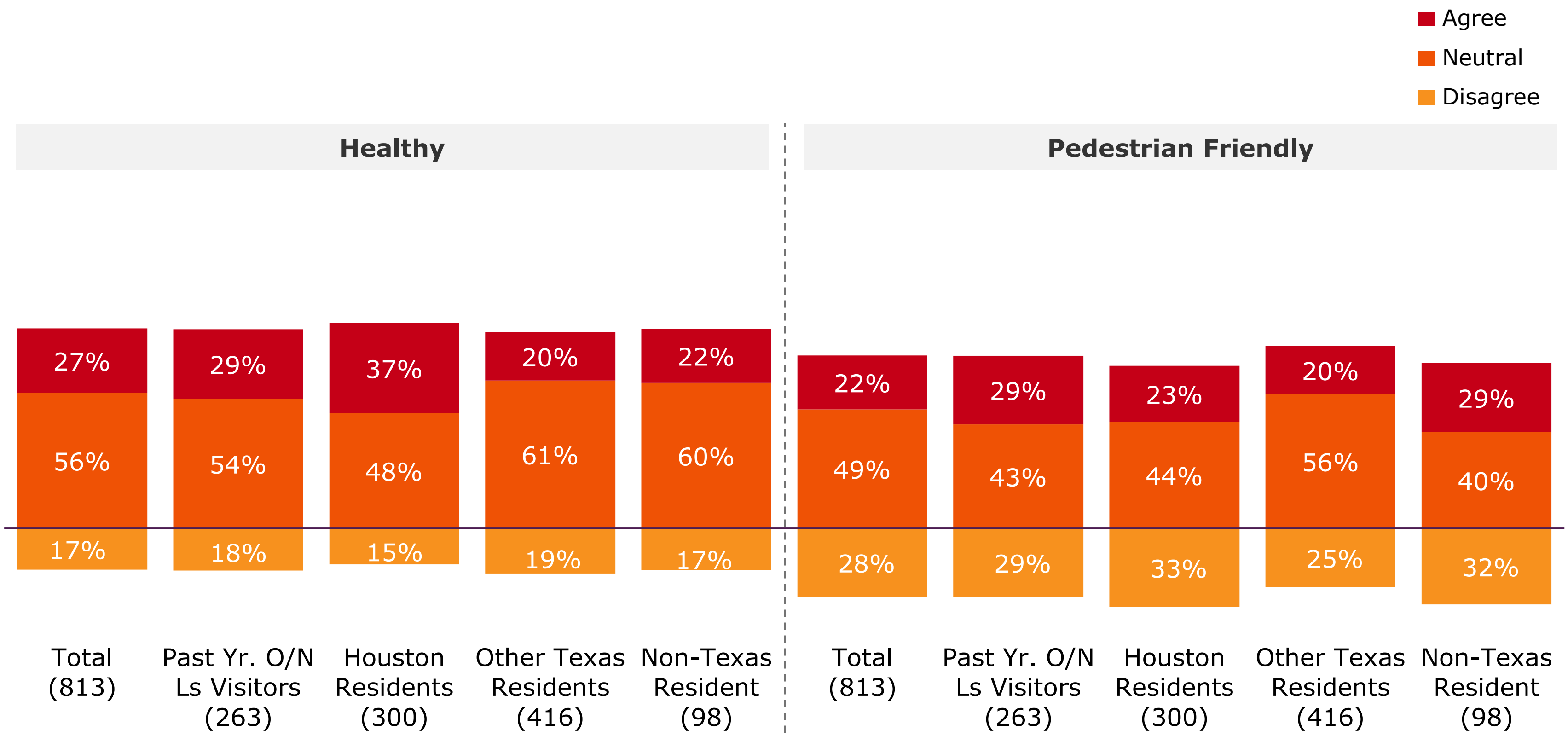
Half of those contacted perceive Houston as ***connected,*** but fewer consider it ***young***.



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions

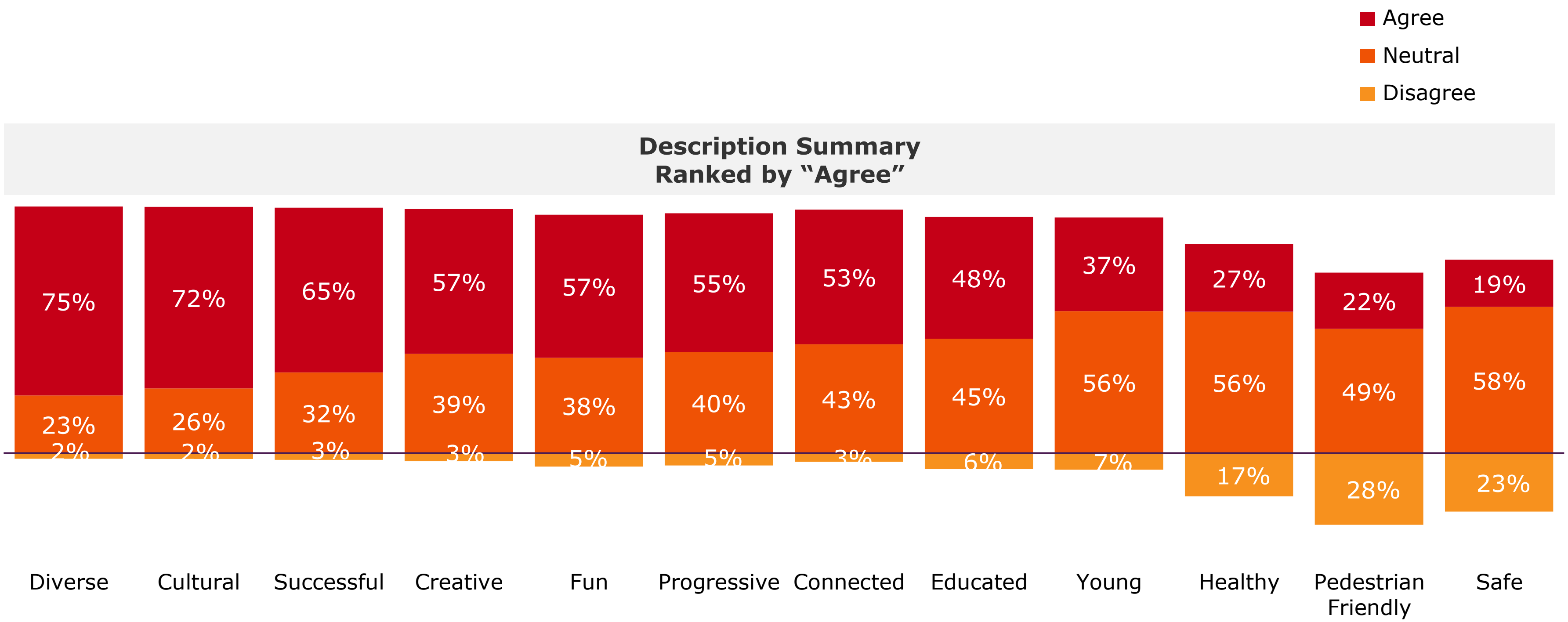
Viewed as about average for ***health***, Houston lags other attributes as a ***pedestrian-friendly***.



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions: Summary

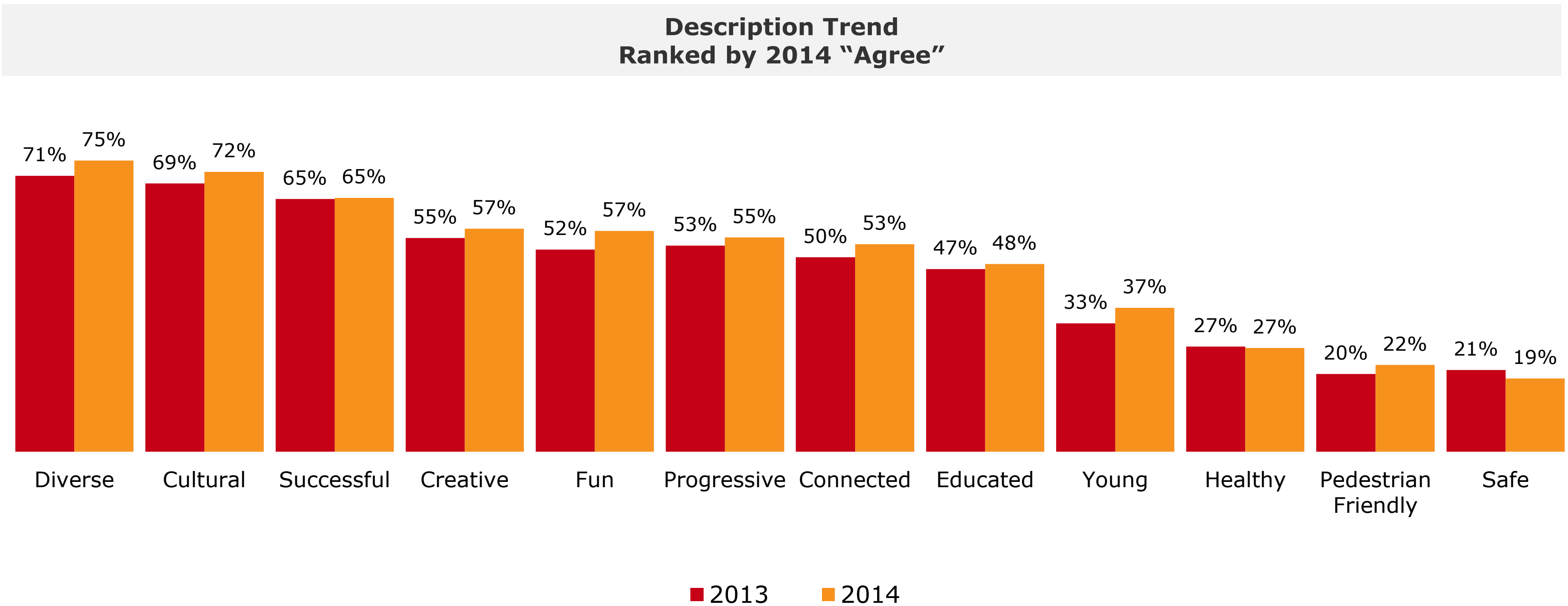
Houston gets rave reviews for ***diversity, culture***, and ***success*** and criticism for ***safety*** and ***"walk-ability."***



Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

Houston descriptions: Summary trend

Travelers generally see Houston improving from 2013.



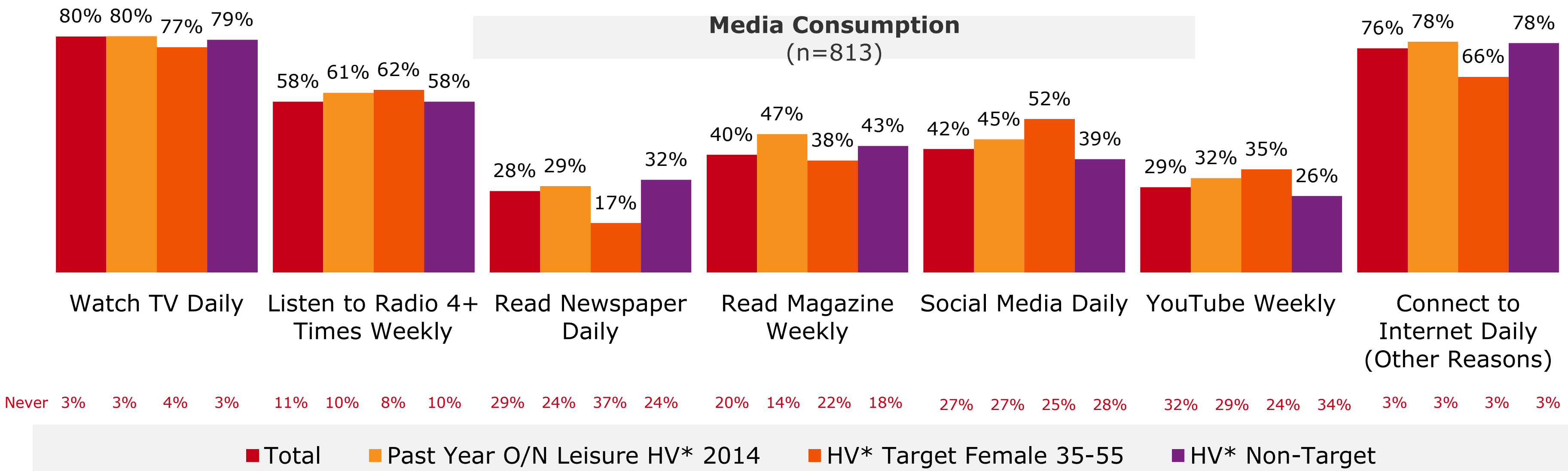
Q42. Please specify whether you disagree, are neutral, or agree with the following words as descriptors for the city of Houston.

4

Media Choices

Media used: Choosing the right media affects the success of any ad campaign:

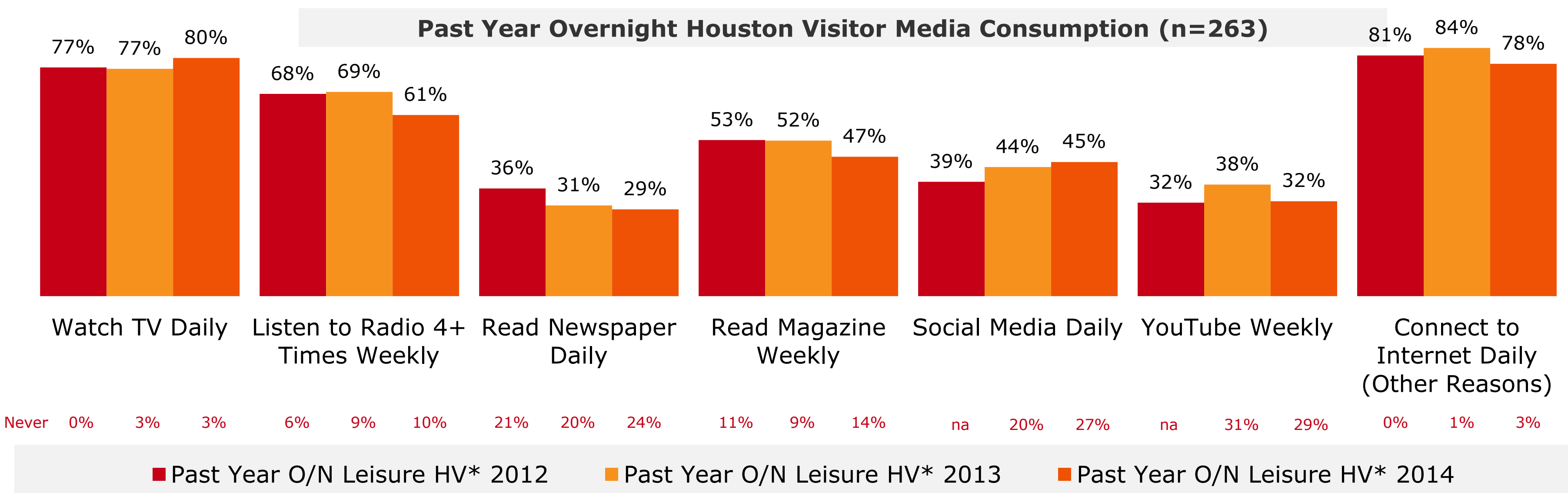
- **TV/Internet**: Almost everyone watches **television (97%)** and connects to the **Internet (97%),** most daily
- **Radio:** Over half **(58%)** listen to the **radio** at least <u>4 times per week</u>, likely many listen while driving
- **Newspapers:** Few leisure travelers **(28%)** read a daily newspaper; even fewer among the target (17%) group
- **Magazines:** Not designed for daily use, fewer than half read magazines weekly, but the proportion rises among past year overnight Houston leisure visitors (47%)
- **Social Media:** **Two in five** use social media, more among those in the Target group **(52%)**
- **YouTube:** Few watch it daily (8%, not shown), but most watch it occasionally (68%; 76% Target).



HV* = Houston Visitor
Q38. How often would you say you do each of these activities?

Media used: Trends by past year overnight leisure Houston visitors:

- **TV/Internet:** Television viewing and Internet connectivity remain nearly a daily function for most
- **Radio:** Radio listeners decline from prior years
- **Print:** Both newspapers and magazines slip from a couple of years ago
- **Social Media:** Remains similar to last year, but climbs above two years ago
- **YouTube:** Weekly viewership fluctuates a bit, but most (71%) watch at least occasionally, similar to last year.



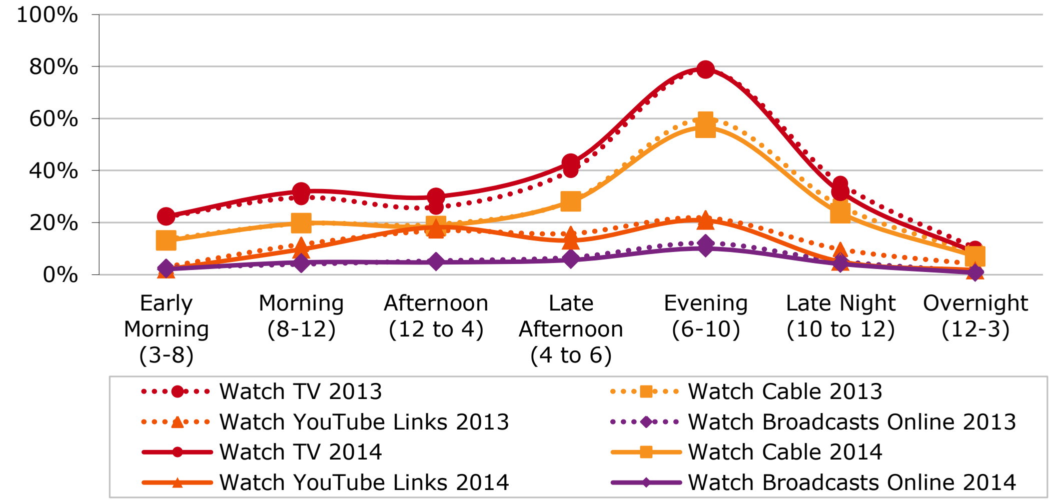
HV* = Houston Visitor
Q38. How often would you say you do each of these activities?

Timing for watching media

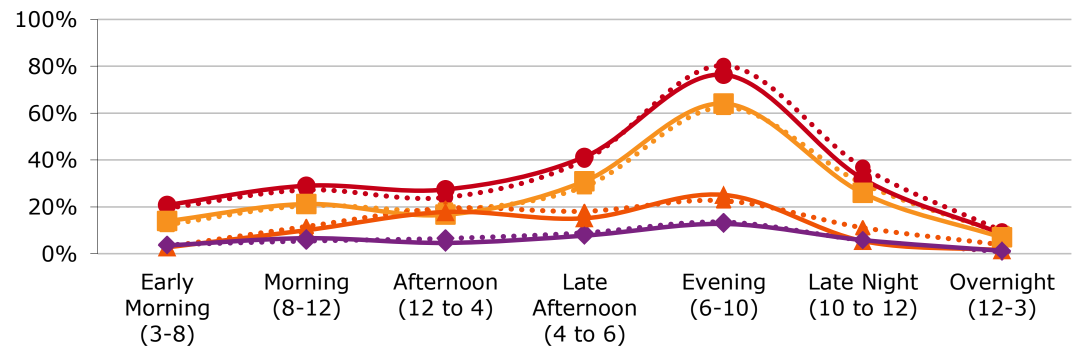
Viewing Habits:

- People more likely watch TV in the evening (from 6 – 10 pm)
- Television (and Cable) accounts for most viewing choices
- One in four to five (21% total; 25% past year Houston overnight leisure visitor) watches YouTube in the evening
- Watching Broadcasts online lags other choices.

Total



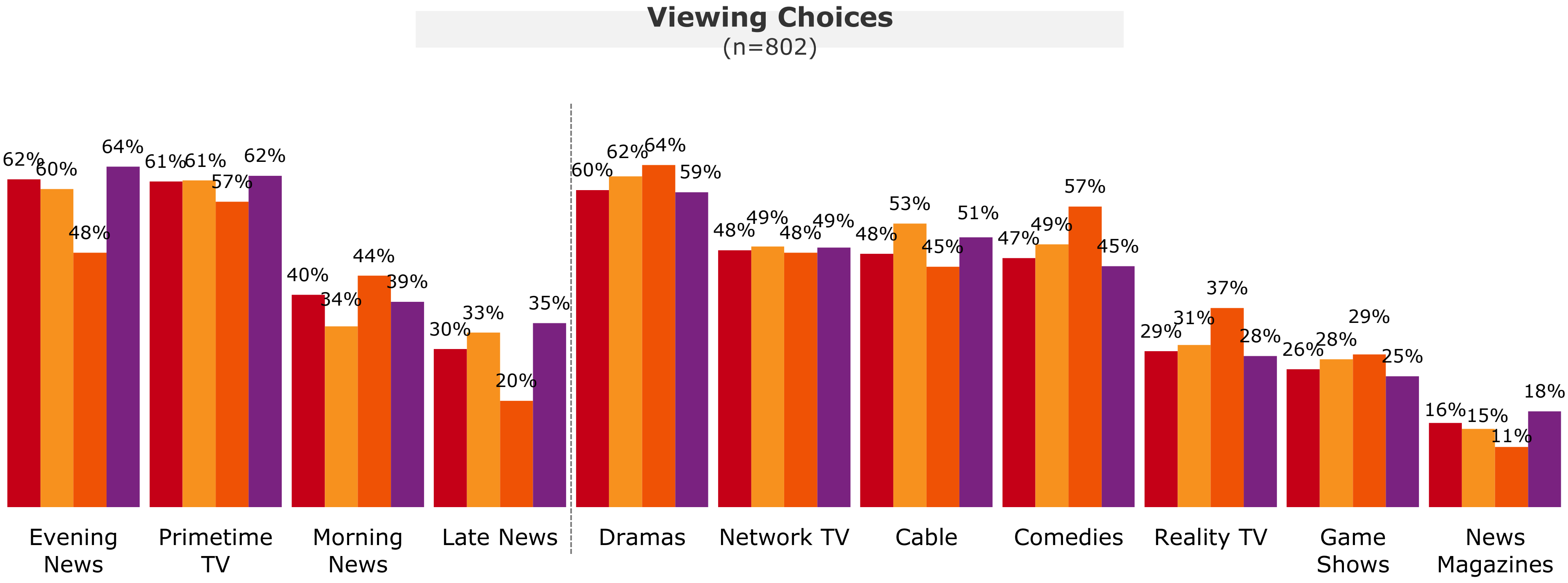
Past Year Houston Overnight Leisure Visitor



Q39. When do you watch TV or Online Broadcasts?

Viewing choices

Various types of shows have similar appeal across groups, except that more Target visitors prefer dramas, comedies, and reality TV than other groups; fewer of them prefer news programs than non-target visitors except for morning news shows.

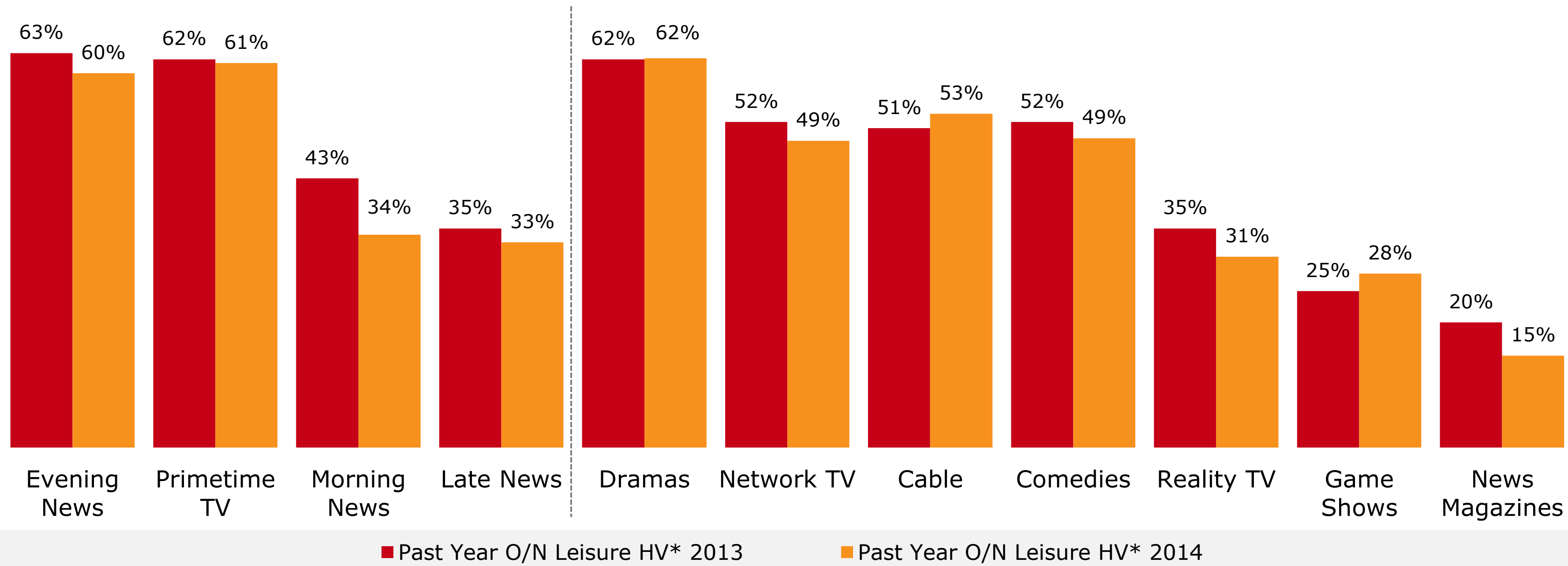


HV* = Houston Visitor
Q40. What do you watch?

Viewing choices: Trend

Except for morning news shows, viewing choices remain very similar to the past for Houston overnight leisure visitors.

Past Year Overnight Leisure Houston Visitors: Viewing Choices
(2014 n=259)



HV* = Houston Visitor
Q40. What do you watch?

5

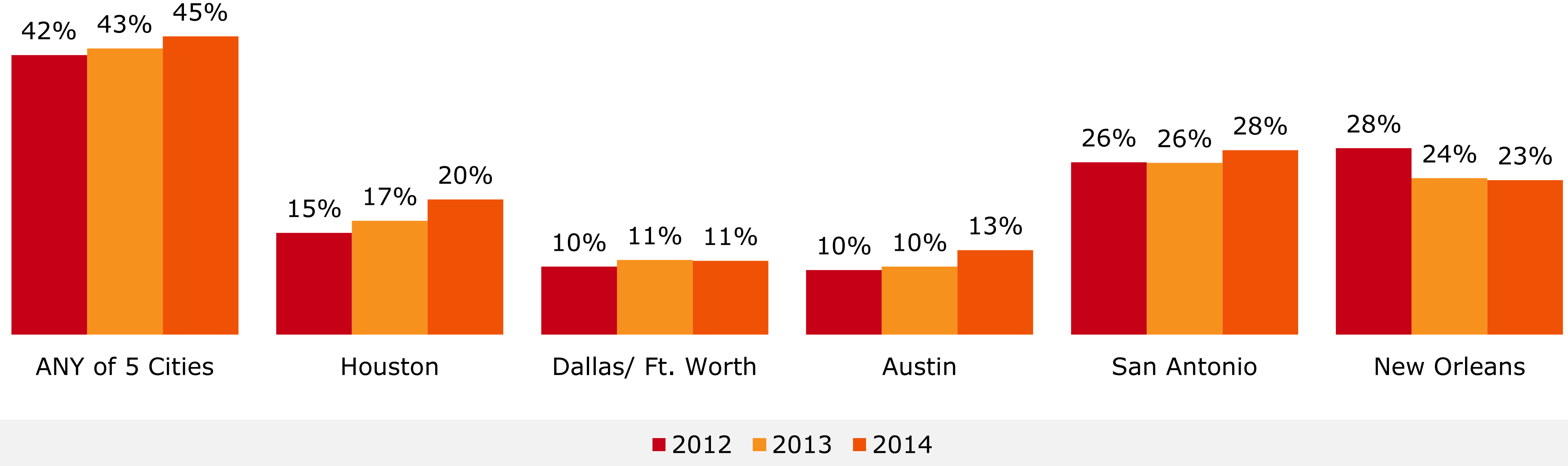
General Advertising Awareness

City advertising awareness (unaided)

Destinations use advertising to build interest:

- Not quite half (43%) of these travelers recall advertising for at least one featured city (Houston, Dallas/Ft. Worth, Austin, San Antonio, or New Orleans), with San Antonio (28%) remaining in the lead
- Houston continues to rank third (20%), but ***narrows the gap*** with second-place New Orleans.

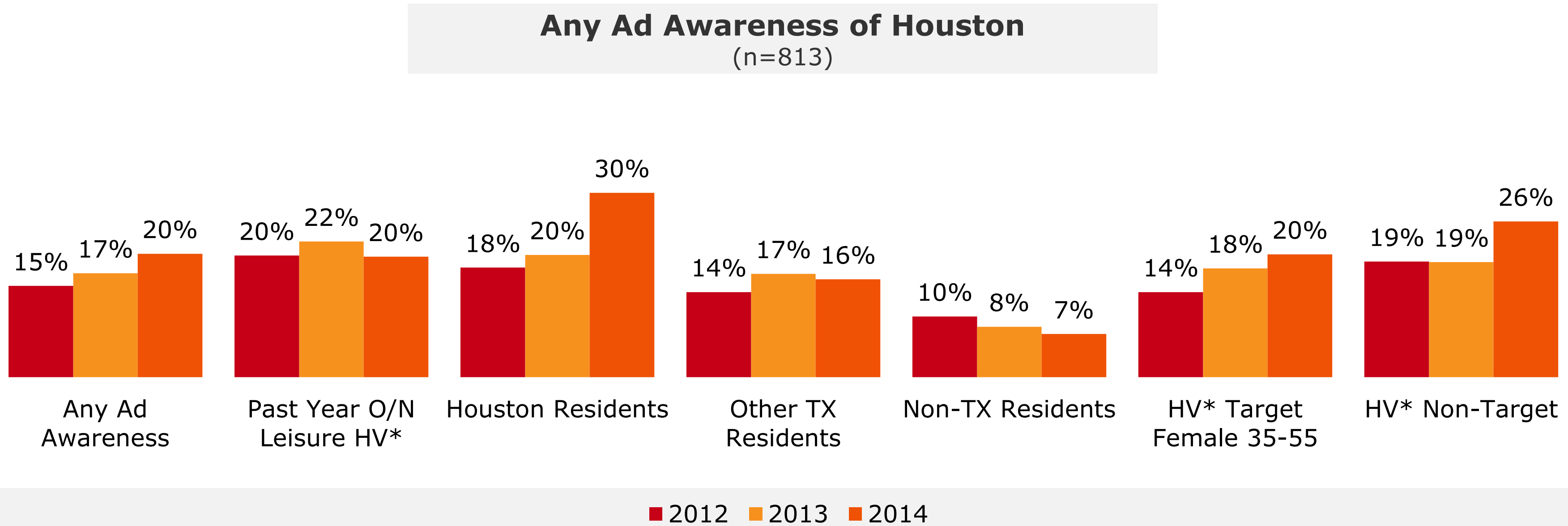
Any Ad Awareness
(n=813)



Q11. In the past 3 months, for which of the following cities have you seen advertising?

Houston advertising awareness (unaided)

Awareness of **Houston advertising increases by an average of 3%** with awareness seeing a **10% spike among its own residents.**

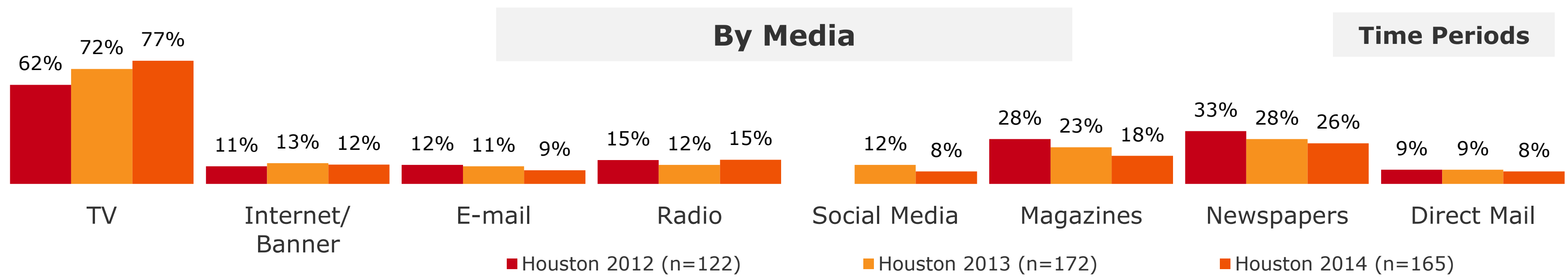


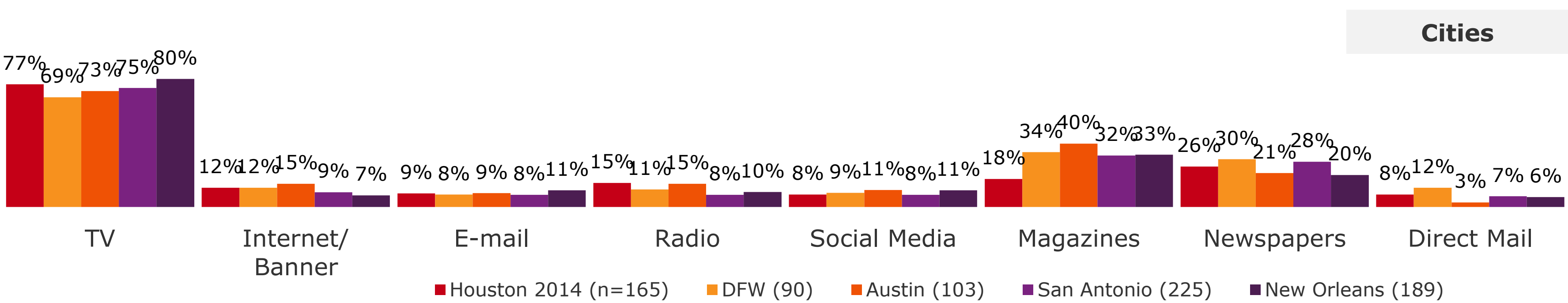
HV* = Houston Visitor
Q11. In the past 3 months, for which of the following cities have you seen advertising?

City advertising awareness by media - unaided

Advertising recall varies by medium:

- **Television leads as a source of ad awareness, especially for New Orleans**
- ***Houston steadily gains in TV awareness*** (which this most popular medium used, page 46) while print declines (magazines and newspapers)
- Dallas/Ft. Worth builds more awareness from newspapers and Austin from magazines than other cities.



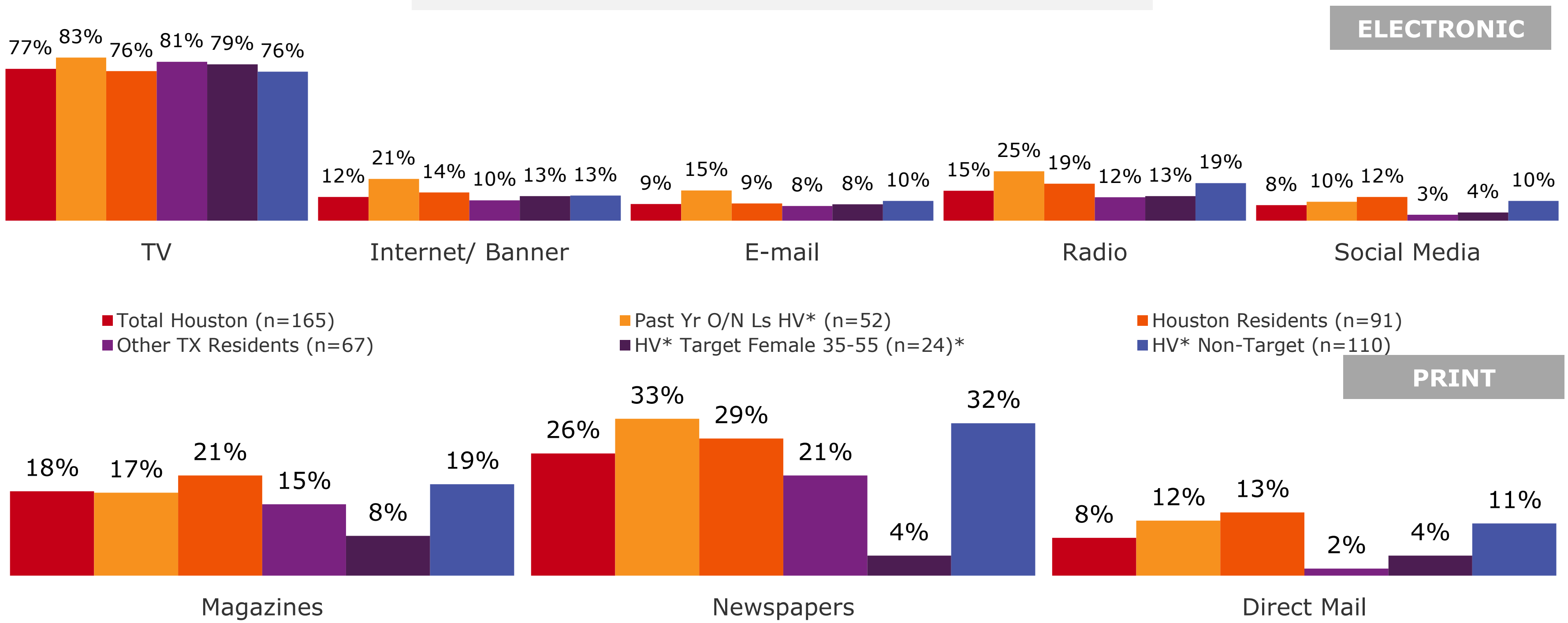


Q12. Abridged: For each city, please indicate what type of media you recall seeing/hearing advertising.

Houston advertising awareness by media (unaided)

Advertising recall among groups stays fairly consistent, except print (magazines/newspapers/direct mail).

Houston



HV* = Houston Visitor

Q12. Abridged: For each city, please indicate what type of media you recall seeing/hearing advertising. * Very small sample; treat as qualitative only

Perceived impact of (unaided) advertising – each city

As noted in past years, all competitive cities build similar levels of interest via advertising, with Austin in the lead, slightly ahead of New Orleans. Houston mirrors its two-year-ago level.

Each City
(2014 unless labeled otherwise)

Compared to 2013 : (YOY)

Houston -- flat
Dallas 4% down
Austin 7% down
San Antonio -- 7% down
New Orleans -- flat

Compared to 2013 : (YOY)

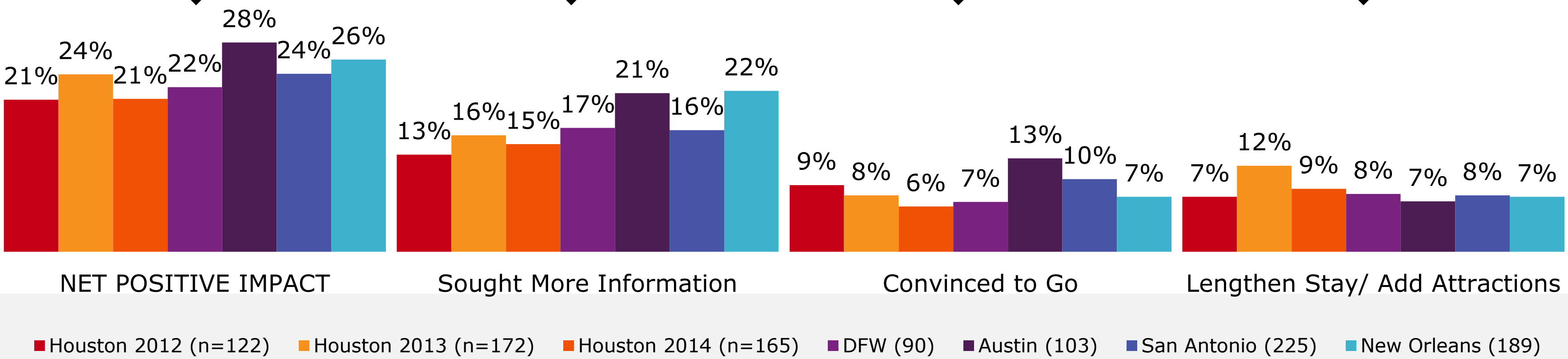
Houston -- flat
Dallas – flat
Austin – flat
San Antonio 6% down
New Orleans 5% increase

Compared to 2013 : (YOY)

Houston --- flat
Dallas -- flat
Austin 5% increase
San Antonio - flat
New Orleans 4% increase

Compared to 2013 : (YOY)

Houston -- flat
Dallas 4% down
Austin 7% down
San Antonio 4% down
New Orleans --- flat

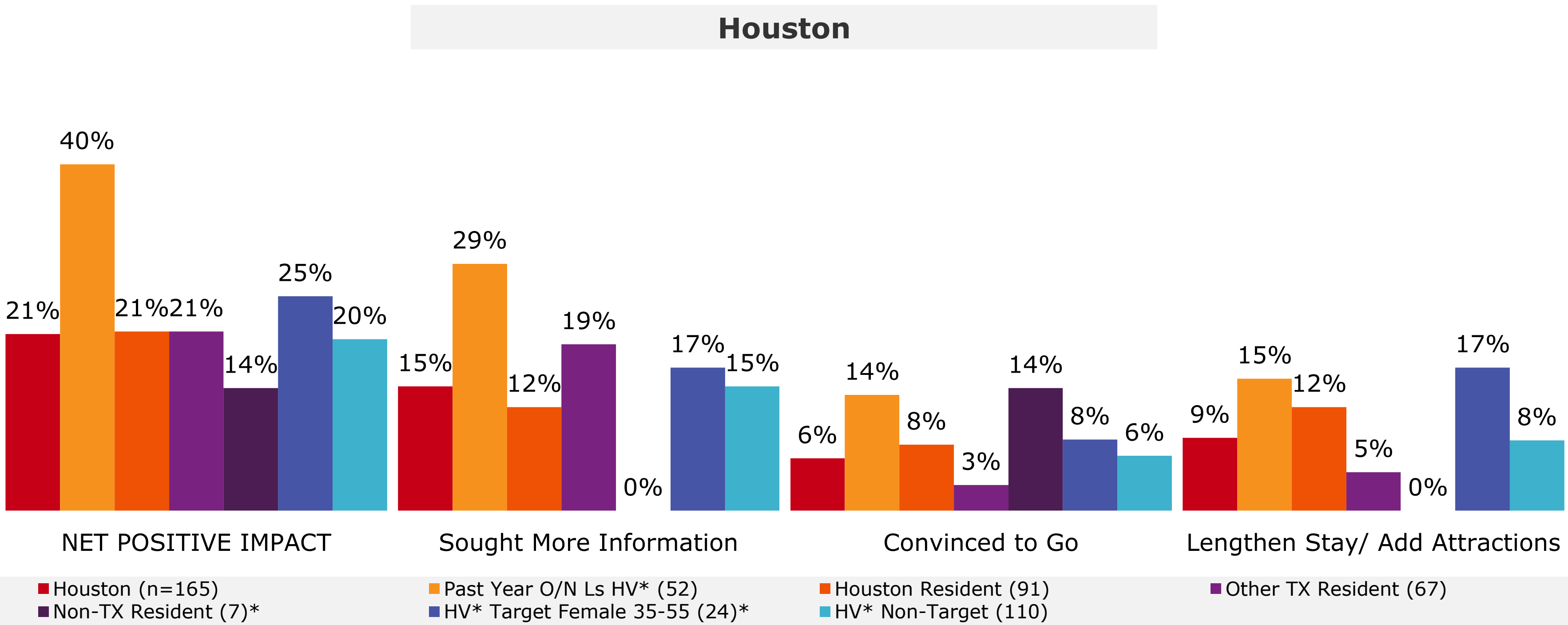


Q13. How has the advertising you've seen affected your leisure travel plans?

Perceived impact of (unaided) Houston advertising

Houston reaps the largest benefits from advertising among **past year overnight leisure visitors (37%**) and the **target group (35%).**

(Note: too few to cite non-Texas residents)



HV* = Houston Visitor
Q13. How has the advertising you've seen affected your leisure travel plans?* Very small sample; treat as qualitative only

6

Specific GHCVB Ad Awareness

Houston "inspired vacations" print ads

#1

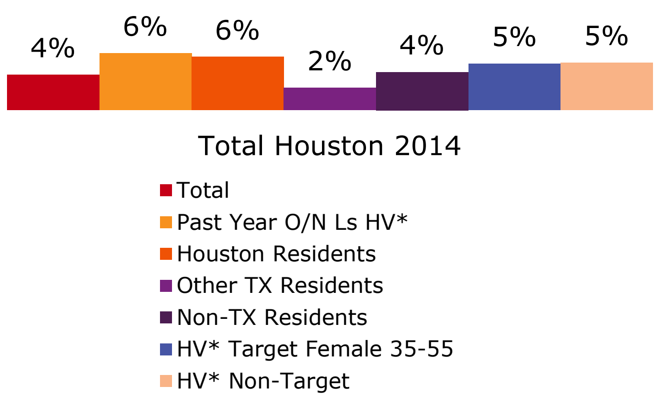
#2

Houston print advertising: “Inspired Vacations” ads

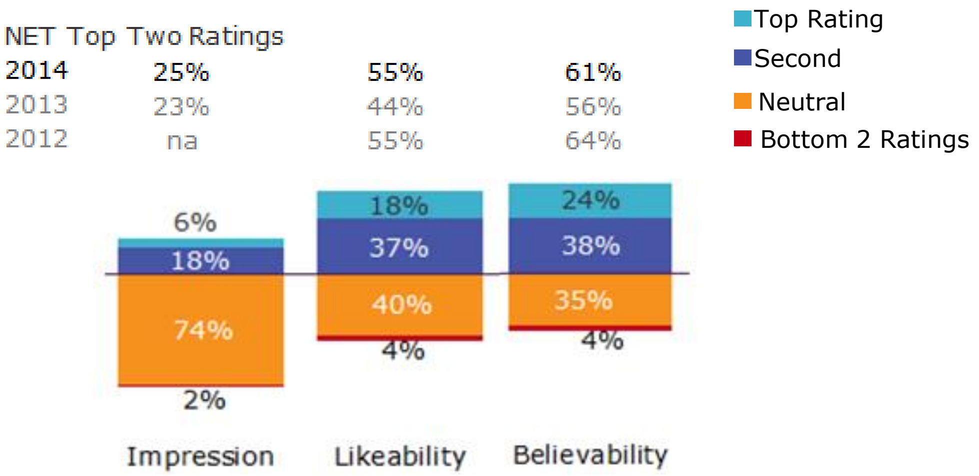
Since the new ads launched during the timing of this study, there is little time for market penetration however, travelers boast strong rankings for ***likeability*** and ***believability***.

“Inspired Vacations” Print Ads (2014 unless labeled otherwise)

Awareness



Opinion Summary



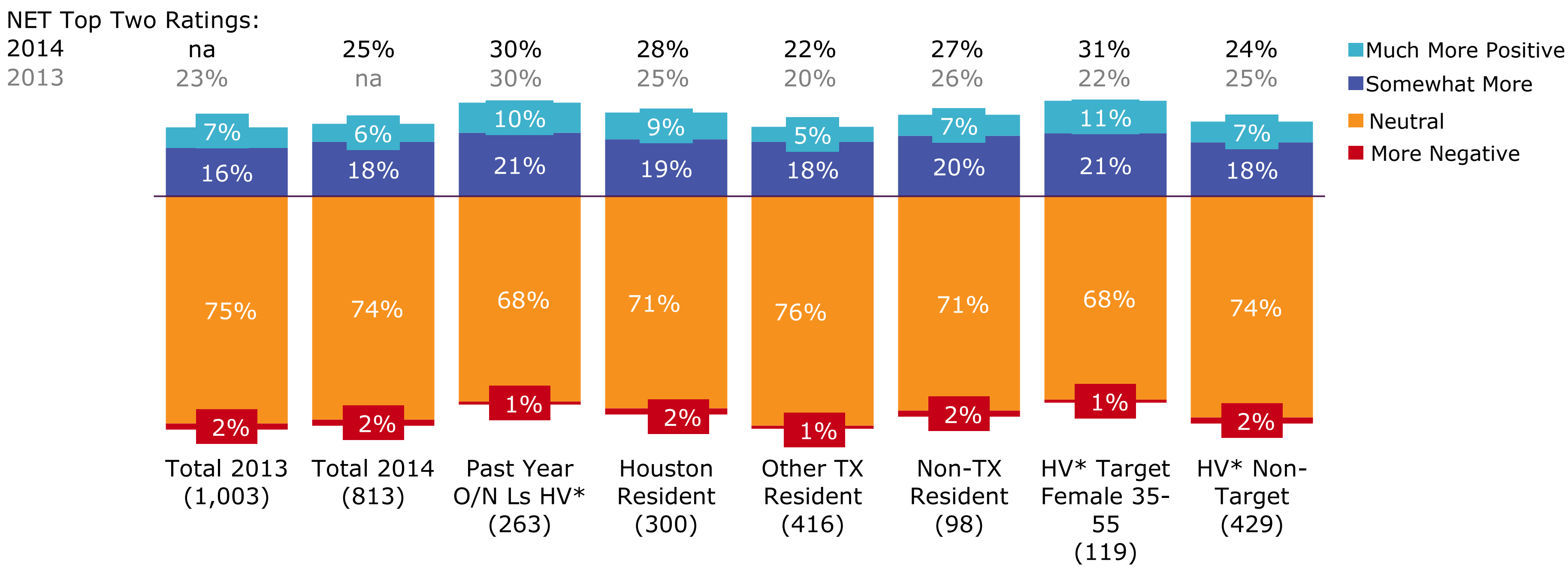
Campaigns:
2014: Inspired vacations
2013: Houston is
2012: My Houston

Q27a/b. Please indicate if you have seen (one of these) ads before.
Q28a/j. Based on this print ad, how has your impression of Houston changed (5-point scale)?
Q28h/d. How believable do you find this print ad (5-point scale)?
Q28b/e. Overall, how much do you like this ad (5-point scale)?
Q28c/g. Based on this print ad, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

Impression of “Inspired Vacations” print ads

The campaign most **positively influences *past visitors*** and ***the target group***; but most have a neutral opinion, even among those groups.

Reaction to “Inspired Vacations” Print Ads - Impression



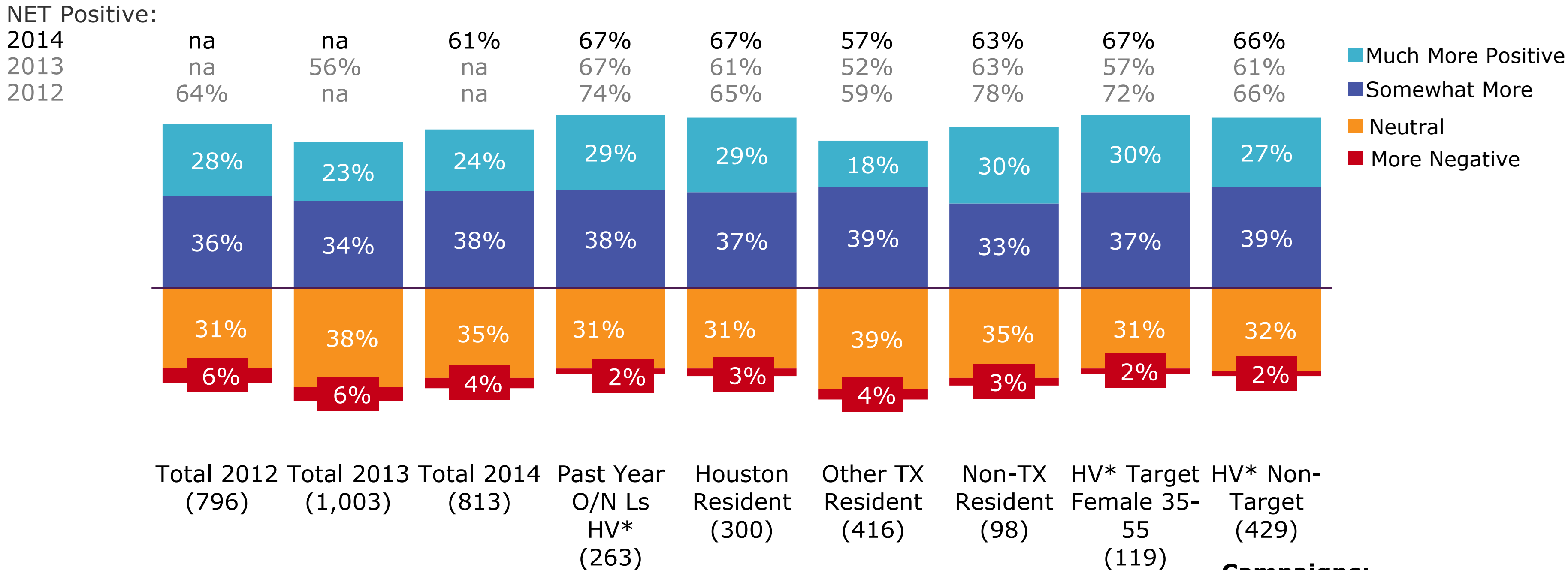
HV* = Houston Visitor
Q28a/j. Based on this print campaign, how has your impression of Houston changed (5-point scale)?

Campaigns:
2014: Inspired vacations
2013: Houston is

Believability of "Inspired Vacations" print ads

When compared to the "Houston is" print ads tested in 2013, the new 2014 ***"Houston Inspired Vacations"*** achieved increased in net positive impact ***(Houstonians, 6%, Other TX residents 5%, Non-target 5%,*** *and* ***10% among the target traveler audience)*** **note ads are running regionally therefore non-Texas residents would not be exposed to this creative.*

Reaction to "Inspired Vacations" Print Ads - Believability

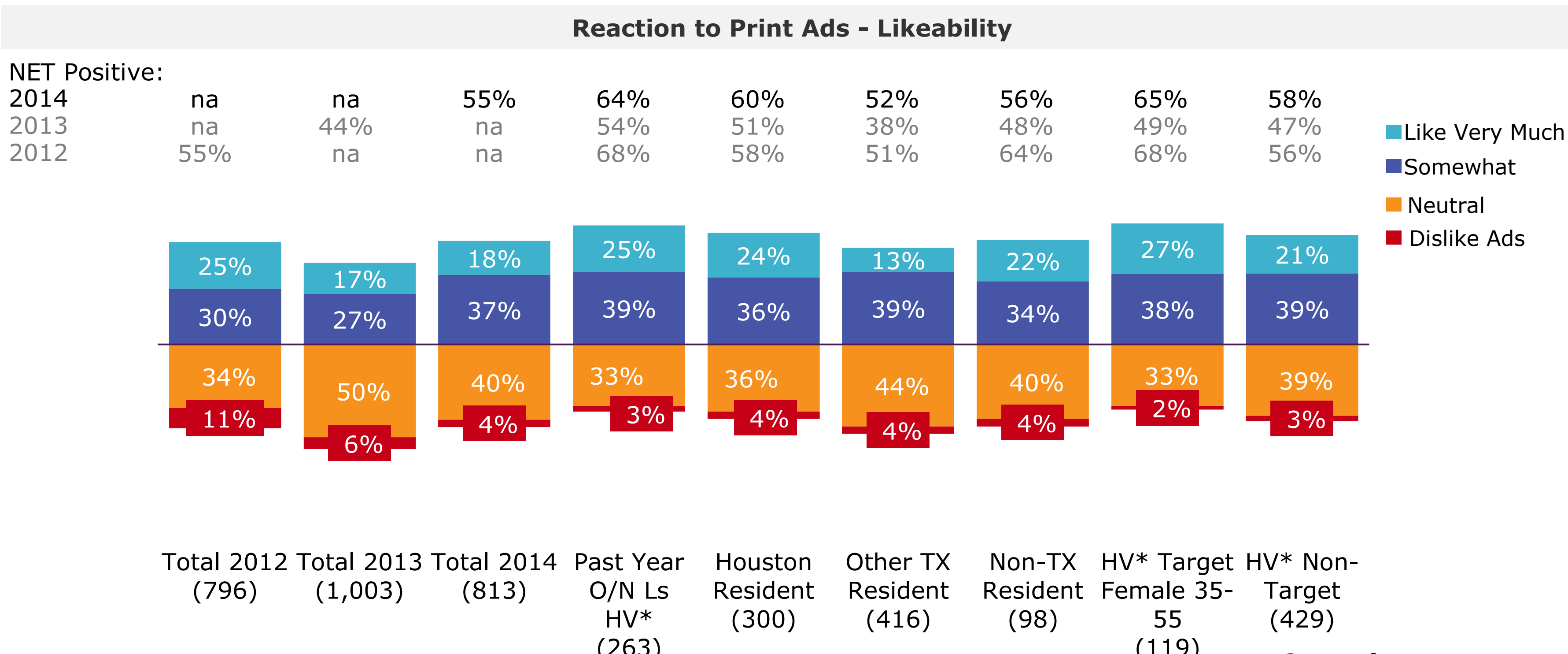


Campaigns:
2014: Inspired vacations
2013: Houston is
2012: My Houston

HV* = Houston Visitor
Q28h/d. Based on this print campaign, how believable do you find this campaign (5-point scale)?

Likeability of “Inspired Vacations” print ads

The new 2014 ***“Houston Inspired Vacations”*** achieved an ***11% overall increase*** in likeability over 2013 and a ***16% increase*** among Houston’s target traveler.



Campaigns:
2014: Inspired vacations
2013: Houston is
2012: My Houston

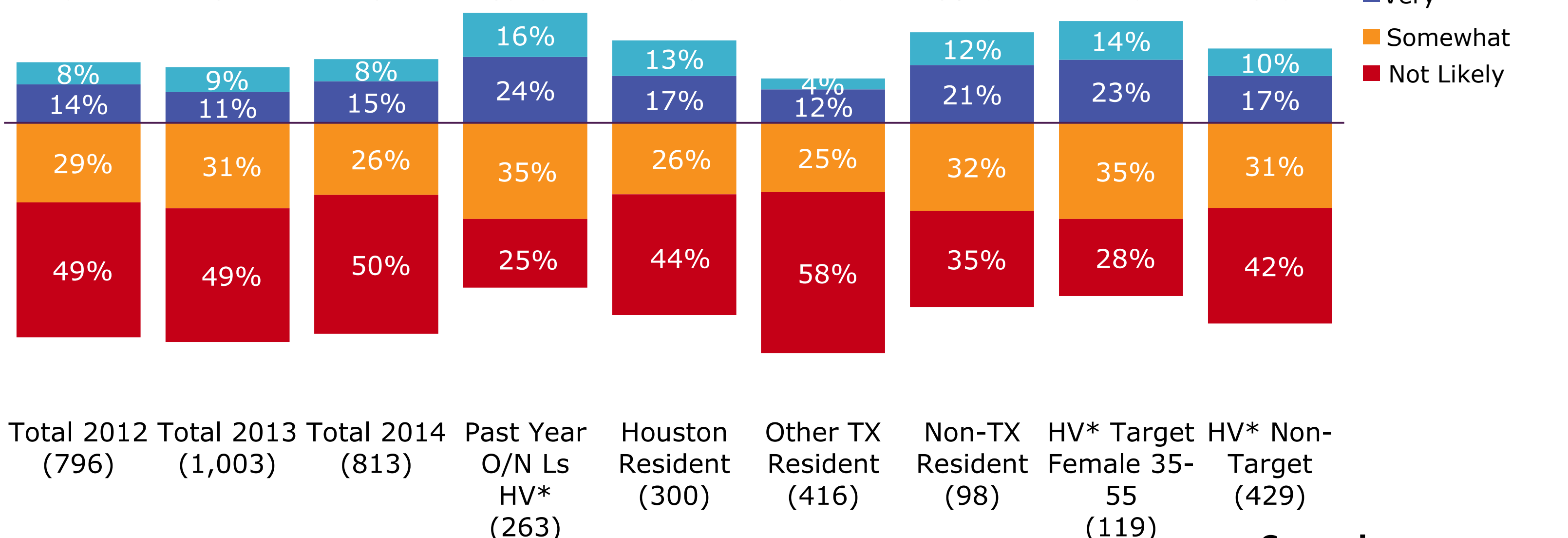
HV* = Houston Visitor
Q28b/e. Overall, how much do you like this campaign (5-point scale)?

"Inspired Vacations" impact on vacations to Houston

"Houston Inspired Vacations" achieved a **10% increase** over 2013 with the **Houston visitor target female**.

Reaction to "Inspired Vacations" Print Ads – Influence on Future Vacation

NET Positive:	Total 2012	Total 2013	Total 2014	Past Year O/N Ls HV*	Houston Resident	Other TX Resident	Non-TX Resident	HV* Target Female 35-55	HV* Non-Target
2014	na	na	23%	40%	30%	16%	33%	37%	27%
2013	na	20%	na	36%	25%	16%	25%	27%	25%
2012	22%	na	na	39%	24%	17%	38%	27%	26%



HV* = Houston Visitor

Q28c/g. Based on this print campaign, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

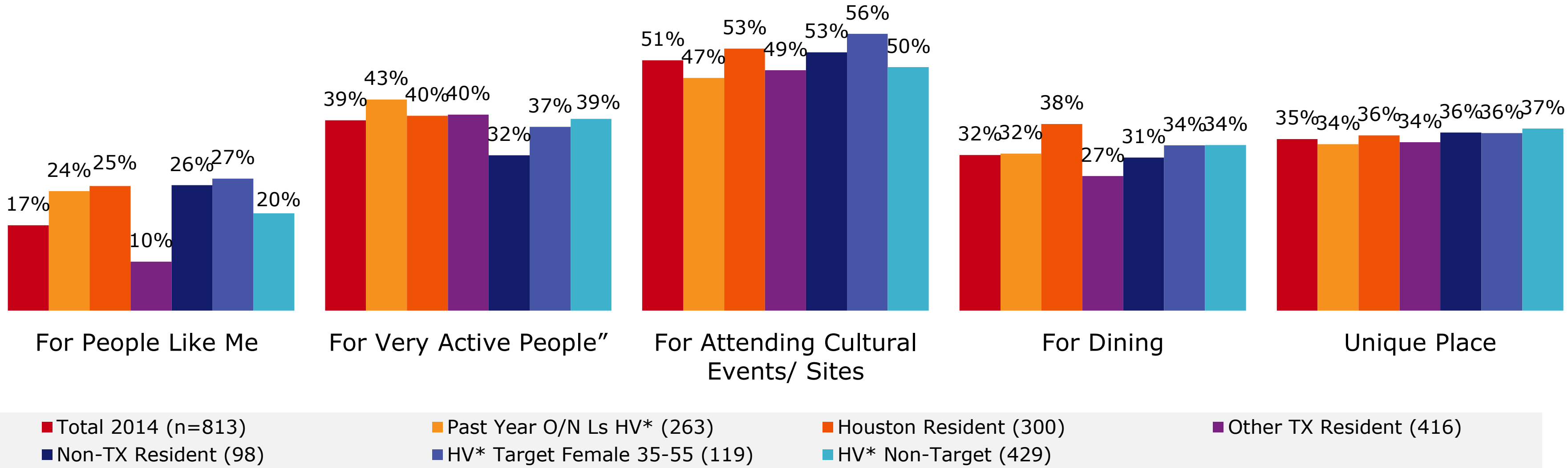
Campaigns:
2014: Inspired vacations
2013: Houston is
2012: My Houston

Associations made with “Inspired Vacations” print ads

Like ads in the past, the ***“Houston Inspired Vacations”*** *creative* does a better job of conveying ***lots to do*** (for very active people).

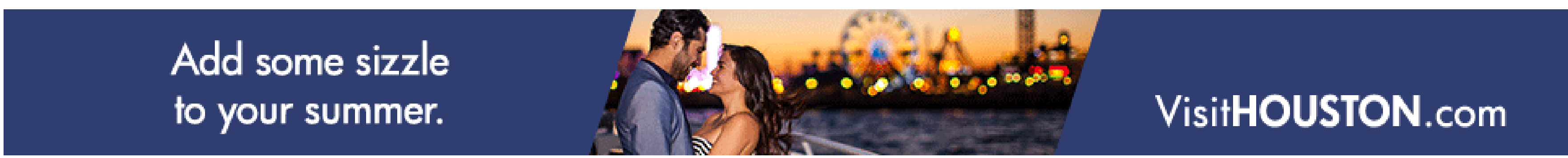
Associations Made With “Inspired Vacations” Print Ads

2014	17%	39%	51%	32%	35%
2013	18%	30%	61%	48%	37%



HV* = Houston Visitor
Q28i/f. What associations do you make with this campaign?

Houston online banner ads

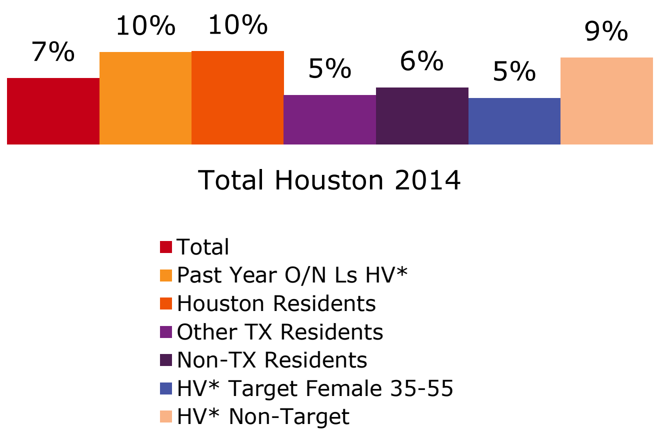


Houston online banner advertising

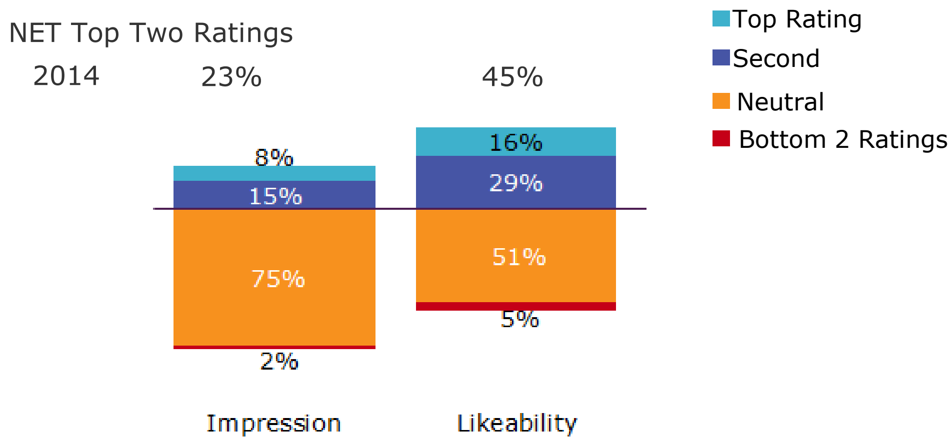
Similar to the print ads, the new banner ads get high marks for ***likeability.***

Online Banner Ads

Awareness



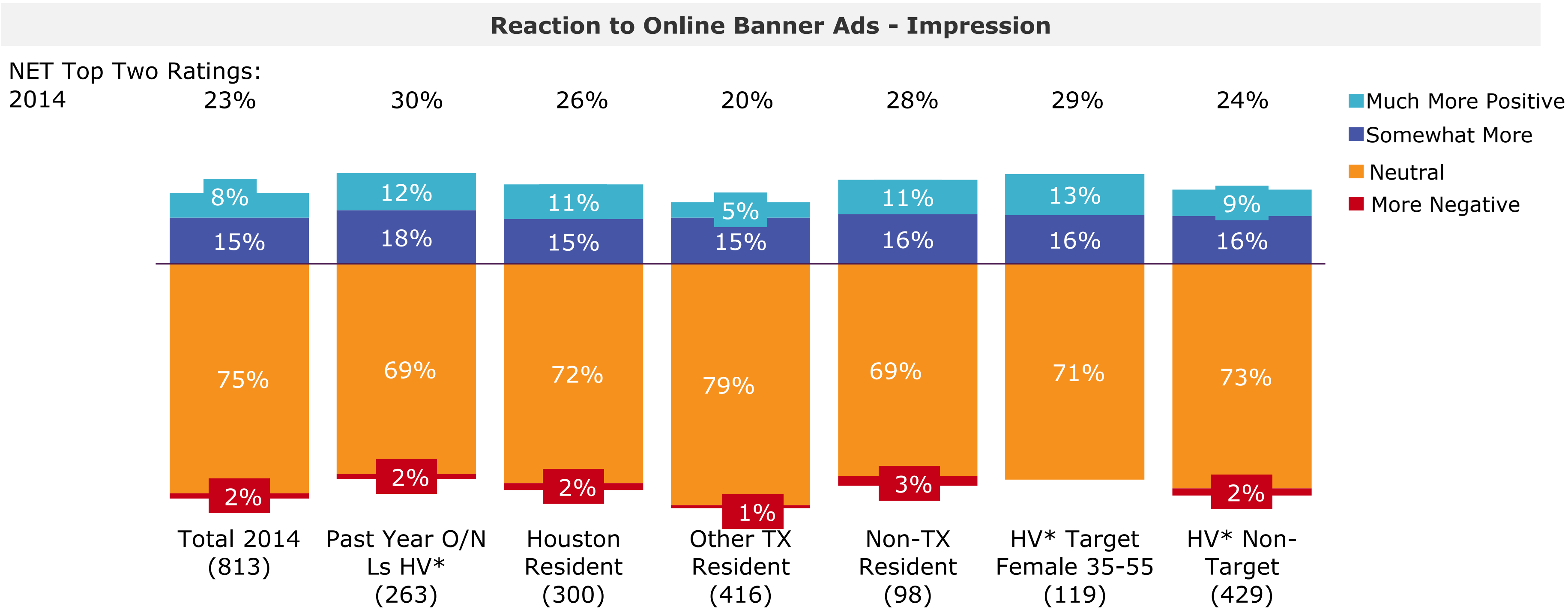
Opinion Summary



Q33. Abridged: Have you seen any of these four banner ads before.
Q34a. Based on these online banner ads, how has your impression of Houston changed (5-point scale)?
Q34b. Overall, how much did you like these ads (5-point scale)?
Q34c. Based on these banner ads, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

Impression of online banner ads

The campaign most positively influences ***past visitors*** including the ***targeted females***.

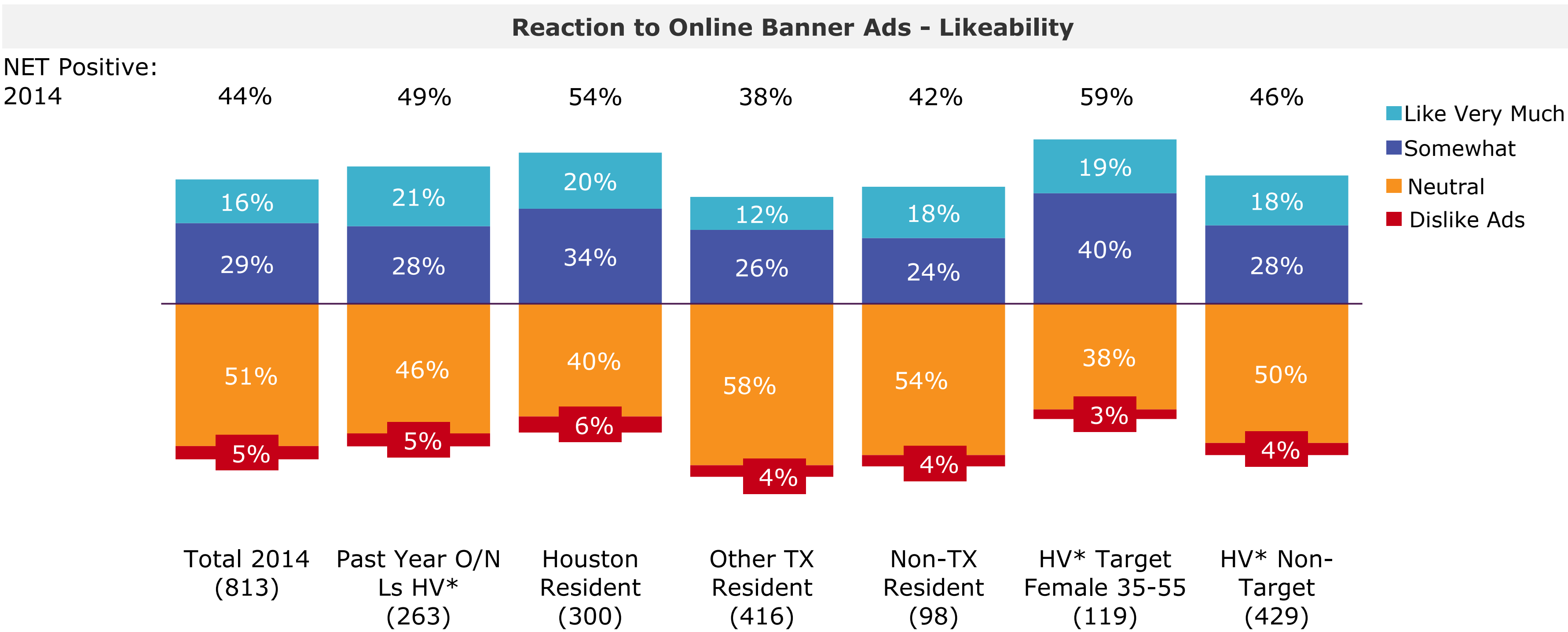


HV* = Houston Visitor

Q34a. Based on these online banner ads, how has your impression of Houston changed (5-point scale)?

Likeability of online banner ads

Many viewers claim to like the banner ads, especially ***Houston residents*** and the ***target group***.



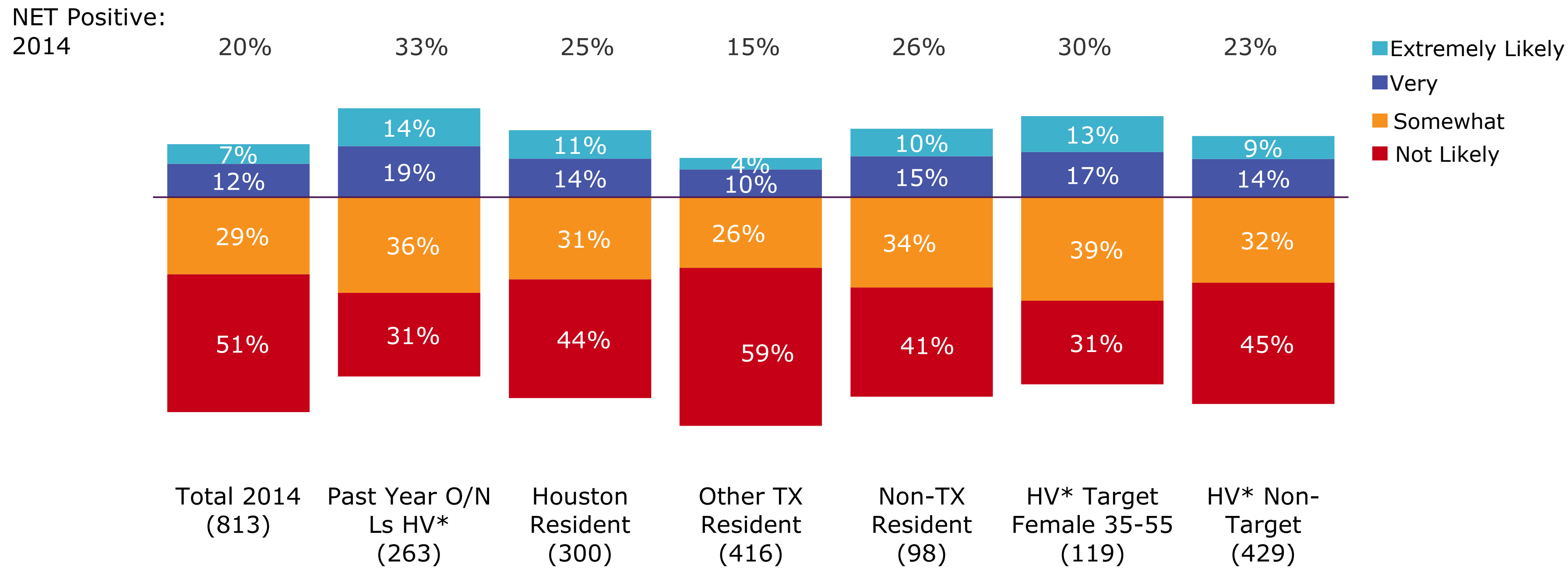
HV* = Houston Visitor

Q34b. Overall, how much do you like these ads (5-point scale)?

Online banner ads' impact on vacations to Houston

While it is difficult to influence potential travelers to visit, these online ads build some interest – ***influencing one in five (20%) overall*** and even more of ***past year overnight visitors (33%)*** and the ***target group (30%)***.

Reaction to Online Banner Ads – Influence on Future Vacation



HV* = Houston Visitor

Q34c. Based on these online banner ads, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

Houston television commercials


Jim Parsons

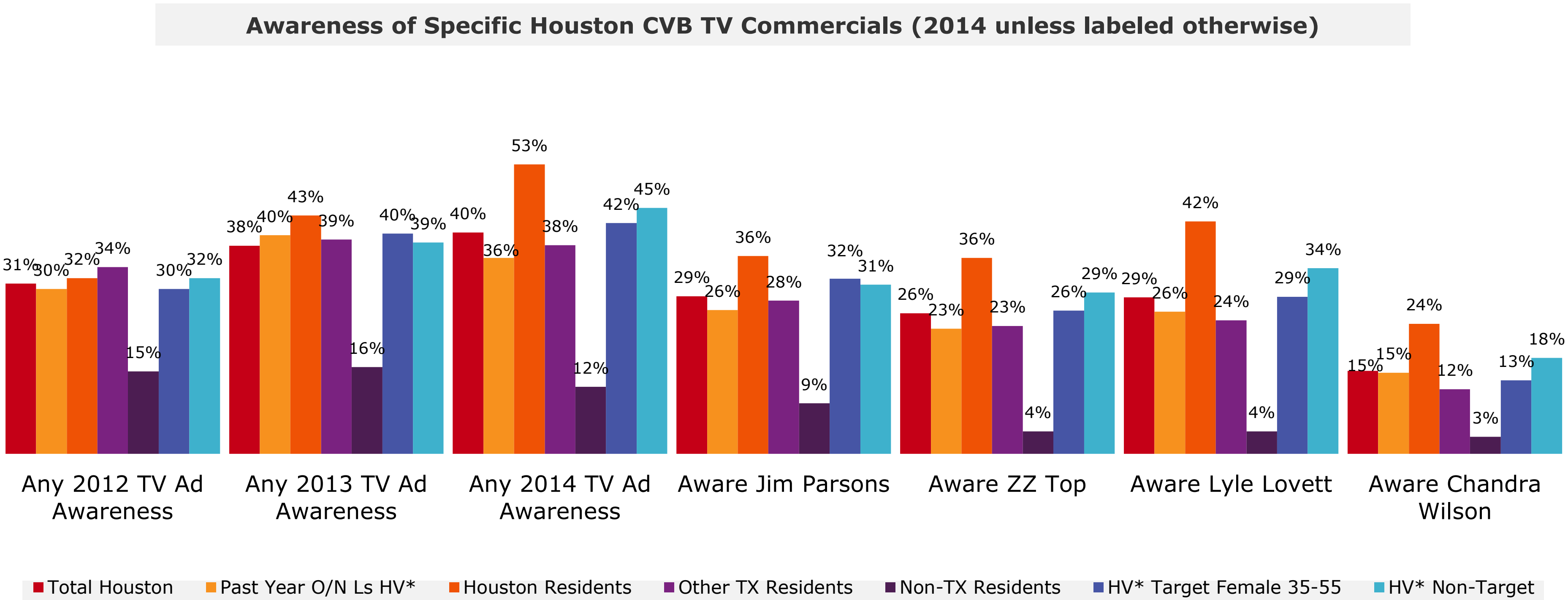
ZZ TOP

Lyle Lovett

Chandra Wilson

Houston TV commercial awareness

In 2014, two in five (40%) now recognize the commercials



HV* = Houston Visitor
Q30j/30z/30l/Q30c. Have you seen this commercial before on TV?

Opinions/reaction to Houston CVB TV commercials

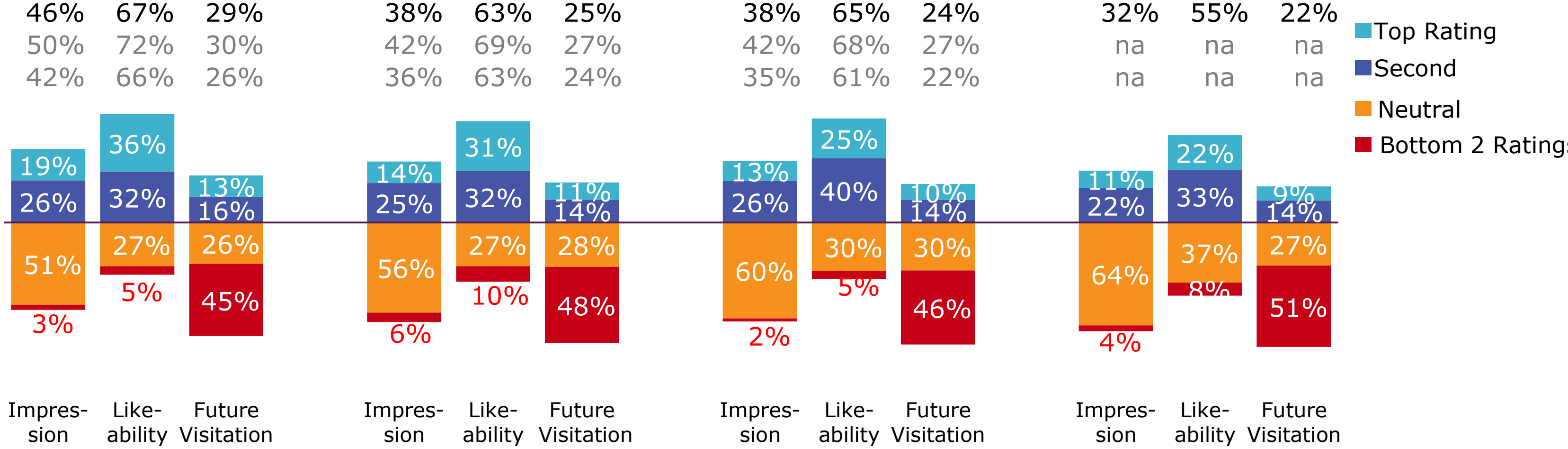
Overall opinions of the TV commercials soften slightly while the new ad (Chandra Wilson) adds to the lineup:

- **Houston's TV ads improve perceptions, especially Jim Parsons (46%)**
- **Most travelers like the ads (55% to 67%)**
- **About a quarter of travelers believe the ads cause them to be more likely to visit Houston.**

Summary of Opinion/Reaction to Houston CVB TV Commercials
(Base: 813)

NET Top Two Ratings:

	Jim Parsons			ZZ Top			Lyle Lovett			Chandra Wilson		
	Impression	Likeability	Future Visitation	Impression	Likeability	Future Visitation	Impression	Likeability	Future Visitation	Impression	Likeability	Future Visitation
2014	46%	67%	29%	38%	63%	25%	38%	65%	24%	32%	55%	22%
2013	50%	72%	30%	42%	69%	27%	42%	68%	27%	na	na	na
2012	42%	66%	26%	36%	63%	24%	35%	61%	22%	na	na	na



Q31aj/az/al/ac. Based on this commercial, how has your impression of Houston changed (5-point scale)?
Q31bj/bz/bl/bc. Overall, how much did you like this commercial (5-point scale)?
Q31cj/cz/cl/cc. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

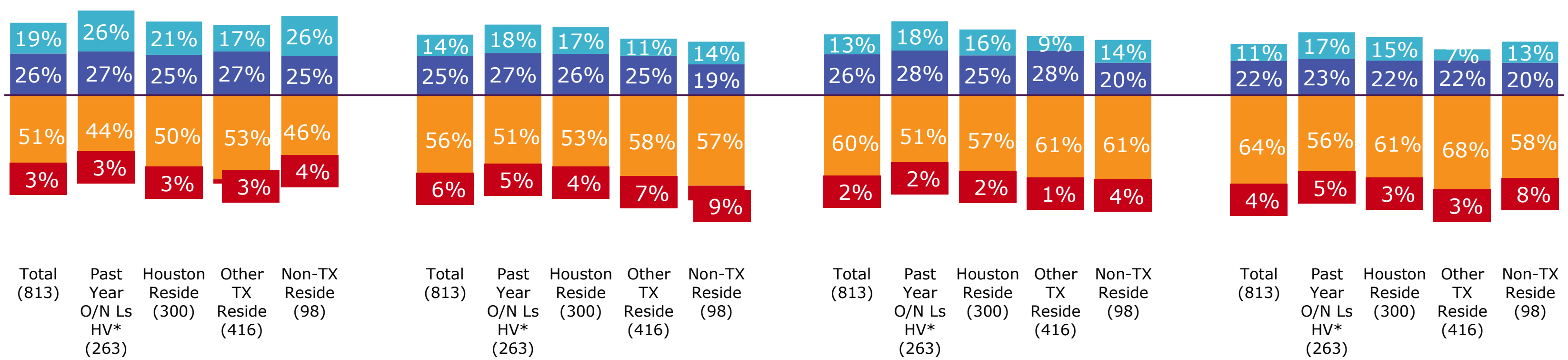
Impression of Houston based on TV commercial

Ads still get the highest praise from past year overnight Houston visitors.

Much More Positive
Somewhat More
Neutral
More Negative

Reaction to Houston CVB TV Commercial - Impression

NET Positive:	Jim Parsons					ZZ Top					Lyle Lovett					Chandra Wilson				
2014	46%	53%	46%	44%	50%	38%	45%	43%	36%	34%	38%	46%	41%	37%	35%	32%	40%	37%	29%	34%
2013	50%	57%	53%	47%	51%	42%	48%	45%	40%	38%	42%	53%	47%	38%	43%	na	na	na	na	na
2012	42%	50%	40%	40%	50%	36%	47%	38%	34%	33%	35%	43%	36%	34%	31%	na	na	na	na	na



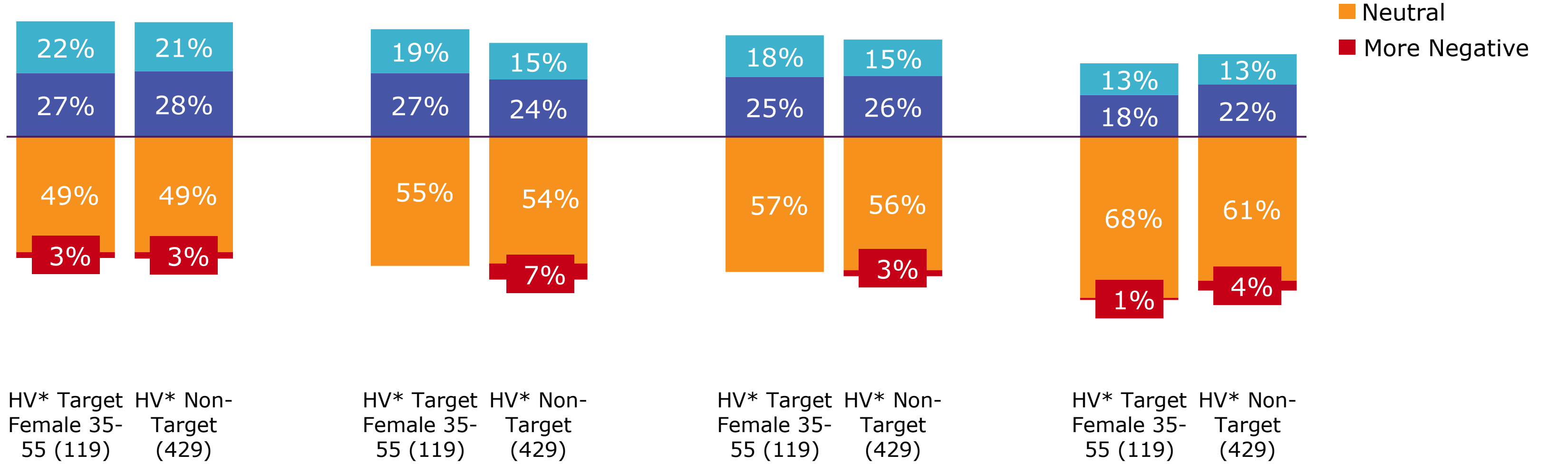
HV* = Houston Visitor
Q31aj/az/al/ac. Based on this commercial, how has your impression of Houston changed (5-point scale)?

Impression of Houston based on TV commercial

The ads work as well for the ***non-Target group*** as the ***Target group***, almost always with a neutral-to-positive impact.

Summary of Opinion/Reaction to Houston CVB TV Commercials

NET Positive:	Jim Parsons HV* Target Female 35-55 (119)	Jim Parsons HV* Non-Target (429)	ZZ Top HV* Target Female 35-55 (119)	ZZ Top HV* Non-Target (429)	Lyle Lovett HV* Target Female 35-55 (119)	Lyle Lovett HV* Non-Target (429)	Chandra Wilson HV* Target Female 35-55 (119)	Chandra Wilson HV* Non-Target (429)
2014	49%	49%	45%	40%	43%	41%	31%	35%
2013	47%	55%	39%	45%	39%	46%	na	na
2012	48%	43%	50%	35%	43%	35%	na	na



Q31aj/az/al/ac. Based on this commercial, how has your impression of Houston changed (5-point scale)?

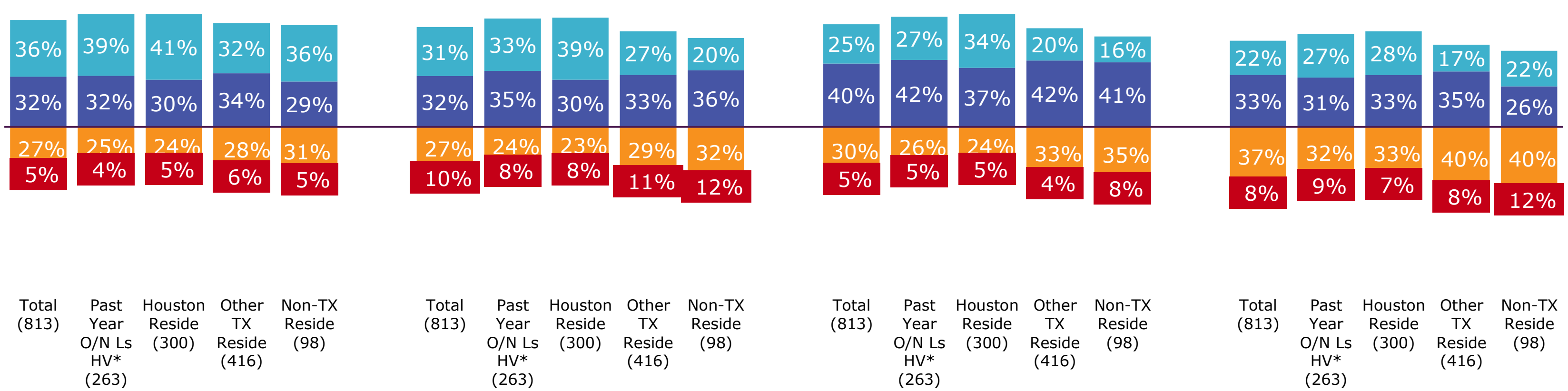
Likeability of Houston CVB TV commercial

Past year overnight Houston visitors and ***Houston residents*** react most favorably.

Like Very Much
Somewhat
Neutral
Dislike Ads

Reaction to Houston CVB TV Commercial – Likeability

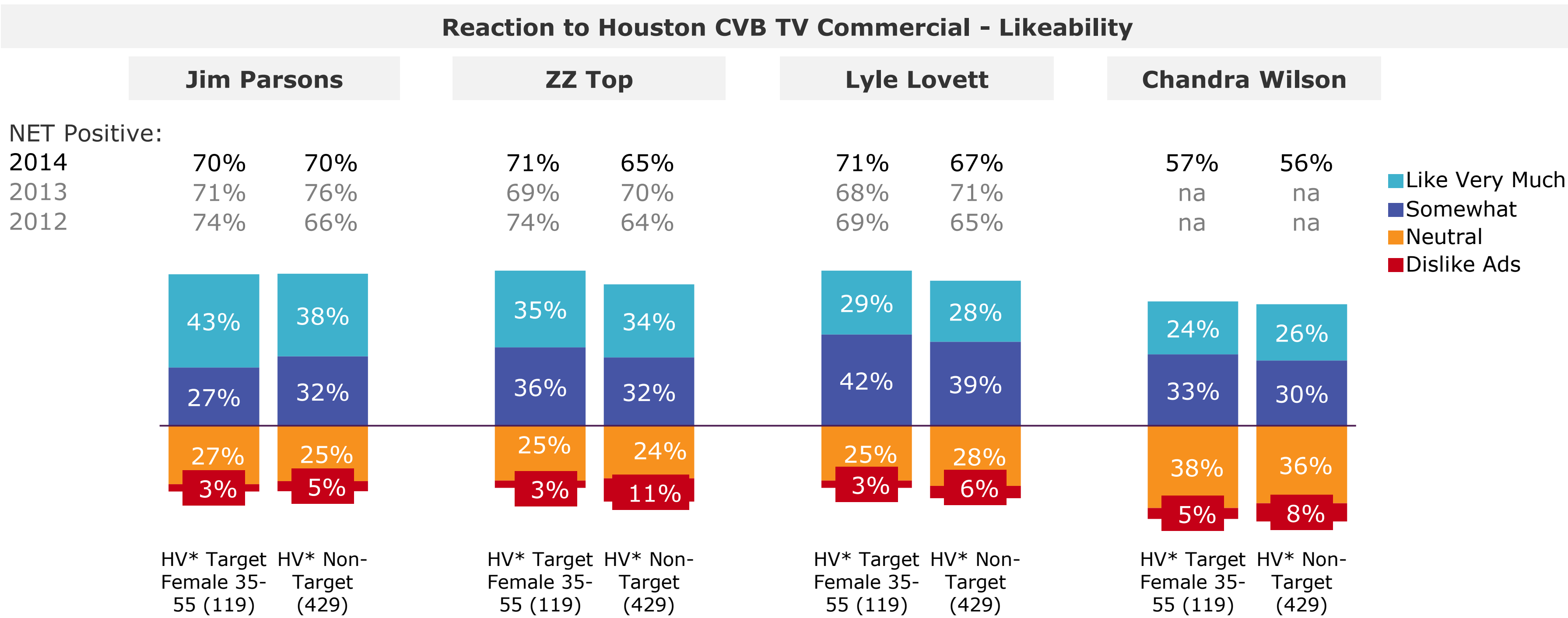
NET Positive:	Jim Parsons					ZZ Top					Lyle Lovett					Chandra Wilson				
2014	67%	71%	71%	66%	64%	63%	68%	69%	60%	56%	65%	70%	71%	62%	57%	55%	59%	60%	52%	48%
2013	72%	78%	77%	69%	71%	69%	73%	72%	69%	59%	68%	74%	75%	64%	64%	na	na	na	na	na
2012	66%	72%	67%	64%	70%	63%	69%	68%	60%	57%	61%	68%	66%	58%	59%	na	na	na	na	na



HV* = Houston Visitor
Q31bj/bz/bl/bc. Overall, how much did you like this commercial (5-point scale)?

Likeability of Houston CVB TV commercial

The four ads appeal to the ***Target** and **non-Target groups*** similarly, except ZZ Top and Lyle Lovett do slightly better among the Target group.



HV* = Houston Visitor
Q31bj/bz/bl/bc. Overall, how much did you like this commercial (5-point scale)?

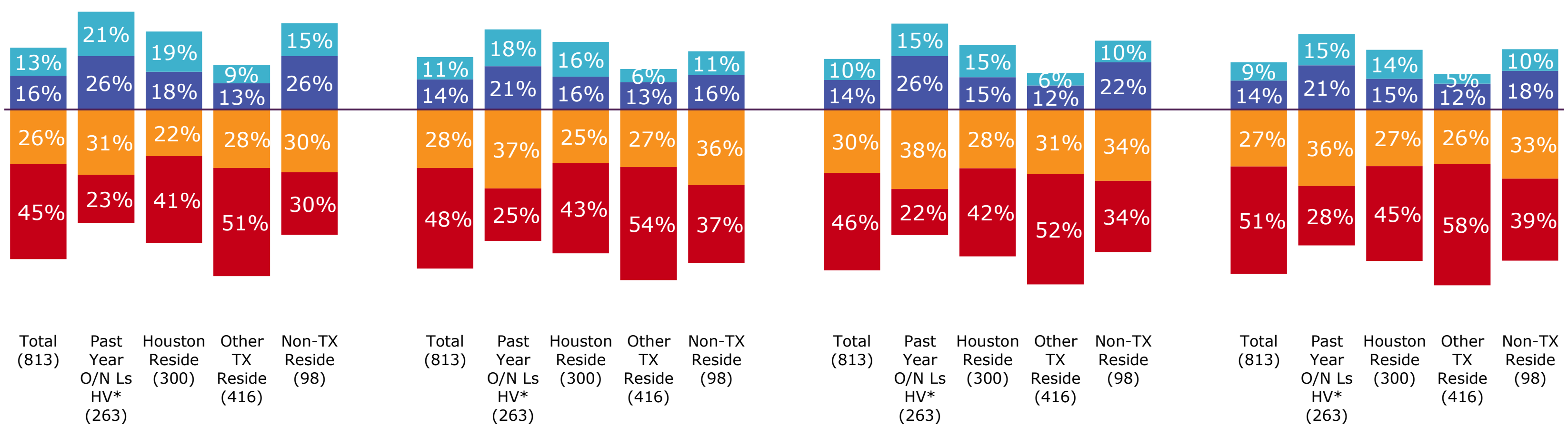
TV commercial impact of taking vacation to Houston

Very similar to last year, about a ***quarter expects to visit Houston based on each commercial***, with past year visitors leading other groups.

Extremely Likely
Very
Not Likely
Somewhat

Reaction to Houston CVB TV Commercial – Influence on Future Vacation

NET Positive:	Jim Parsons					ZZ Top					Lyle Lovett					Chandra Wilson				
2014	29%	46%	37%	21%	41%	25%	38%	32%	19%	28%	24%	41%	31%	17%	33%	22%	36%	28%	17%	29%
2013	30%	48%	37%	24%	33%	27%	43%	33%	23%	28%	27%	44%	35%	21%	28%	na	na	na	na	na
2012	26%	41%	28%	21%	41%	24%	37%	27%	20%	26%	22%	37%	24%	19%	33%	na	na	na	na	na



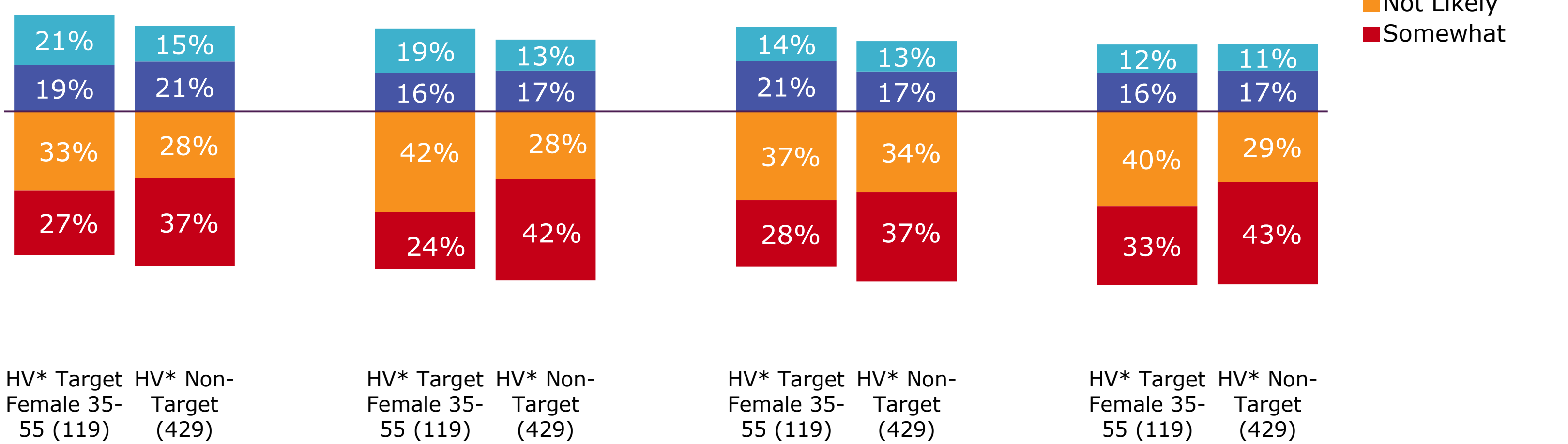
HV* = Houston Visitor
Q31cj/cz/cl/cc. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

TV commercial impact of taking vacation to Houston

The ads build somewhat stronger ***intent to visit*** among the ***Target group***.

Reaction to Houston CVB TV Commercial – Influence on Future Vacation

NET Positive:	Jim Parsons		ZZ Top		Lyle Lovett		Chandra Wilson	
2014	40%	36%	35%	30%	35%	29%	28%	28%
2013	39%	35%	31%	32%	33%	33%	na	na
2012	35%	28%	38%	23%	27%	25%	na	na



HV* = Houston Visitor
Q31cj/cz/cl. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

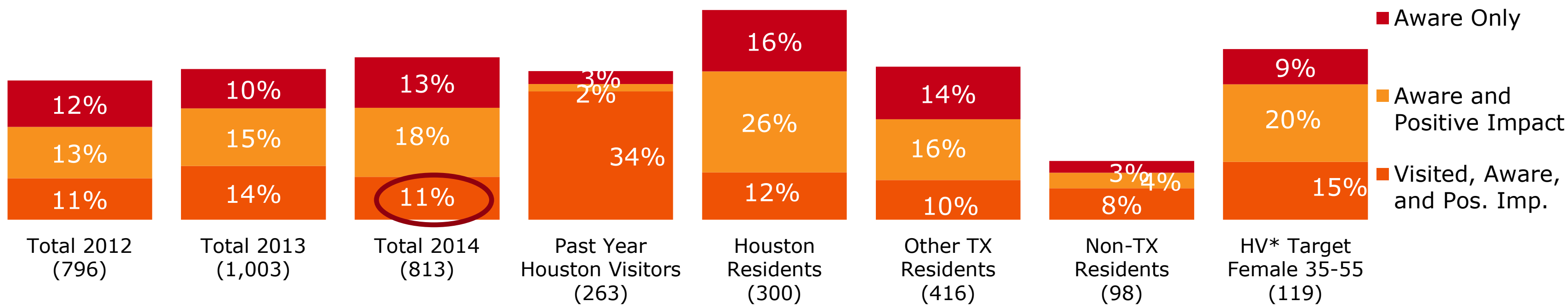
Total advertising impact on Houston visitation

Success of advertising depends upon conversion of viewers to visitors as well as awareness:

- Advertising remains effective – encouraging roughly 1 in 9 (11%) to visit
- Although the new ads have not yet generated as many visits, the potential is there as viewers note a strong positive impact
- Houston advertising awareness meets or exceeds the prior year among all groups except non-Texans
- Three caveats:
  - 1. This measure combines features of current advertising with past travel – so it really measures Houston's ongoing awareness and effectiveness, rather than these specific ads
  - 2. The print and online banner ads are new and have not had much time to build awareness
  - 3. Two measures, by definition, includes Houston visitors, so the effectiveness may look stronger than might be expected (Past Year Houston Visitors and Non-Texas Residents).

NET Aware:

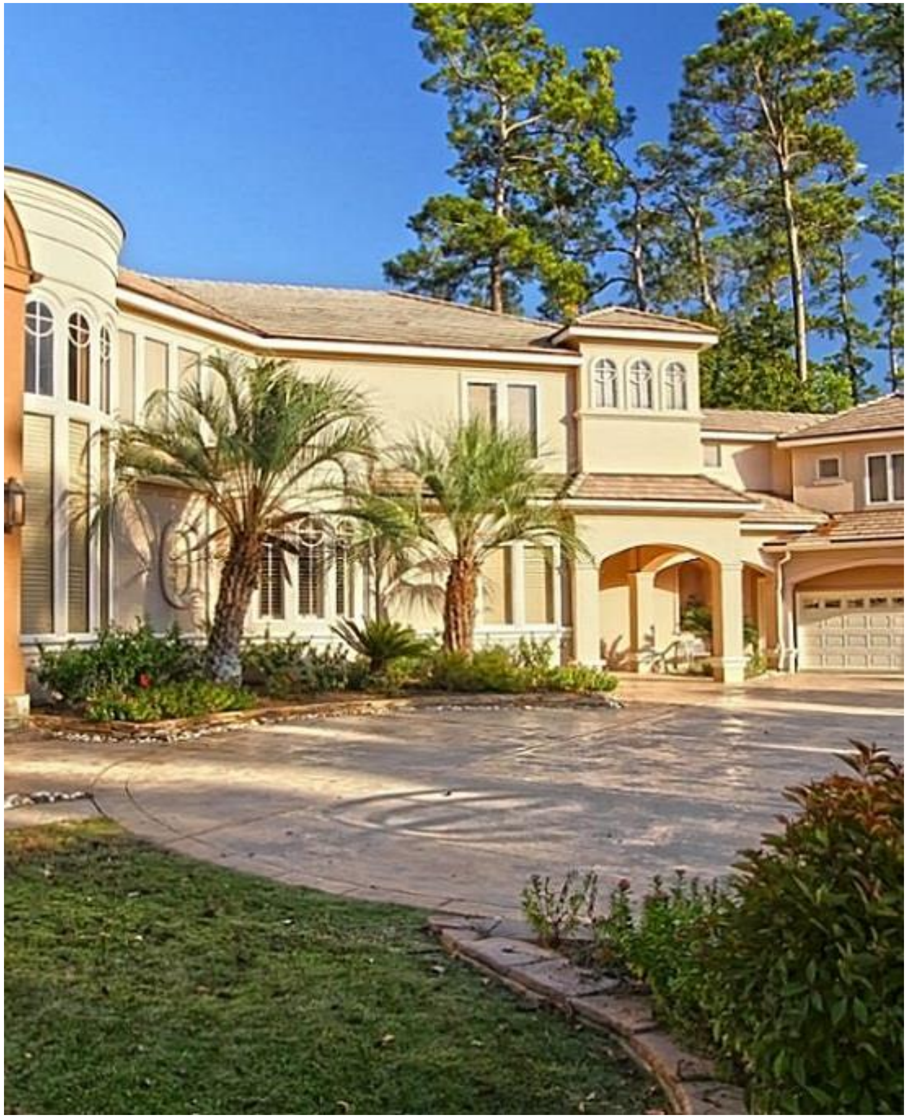
	Total 2012	Total 2013	Total 2014	Past Year Houston Visitors	Houston Residents	Other TX Residents	Non-TX Residents	HV* Target Female 35-55
2014	na	na	42%	39%	55%	40%	15%	45%
2013	na	40%	na	44%	46%	40%	20%	42%
2012	36%	na	na	37%	40%	37%	23%	37%



HV* = Houston Visitor
Q14. Please indicate the total number of overnight leisure trips you have made to the Houston area in the past 12 months.
Q27a/b. Please indicate if you have seen these print ads before.
Q30j/Q30z/Q30l/Q30c. Have you seen this commercial before on TV (Jim Parsons/ZZ Top/Lyle Lovett/Chandra Wilson)?
Q33. Have you seen any of these four online banner ads before?
Q28cg/Q31cj/Q31cz/Q31cl/Q31cc/Q34c. Based on these ads, how likely are you to take an overnight vacation or pleasure trip to Houston in the future?

7

Website Usage

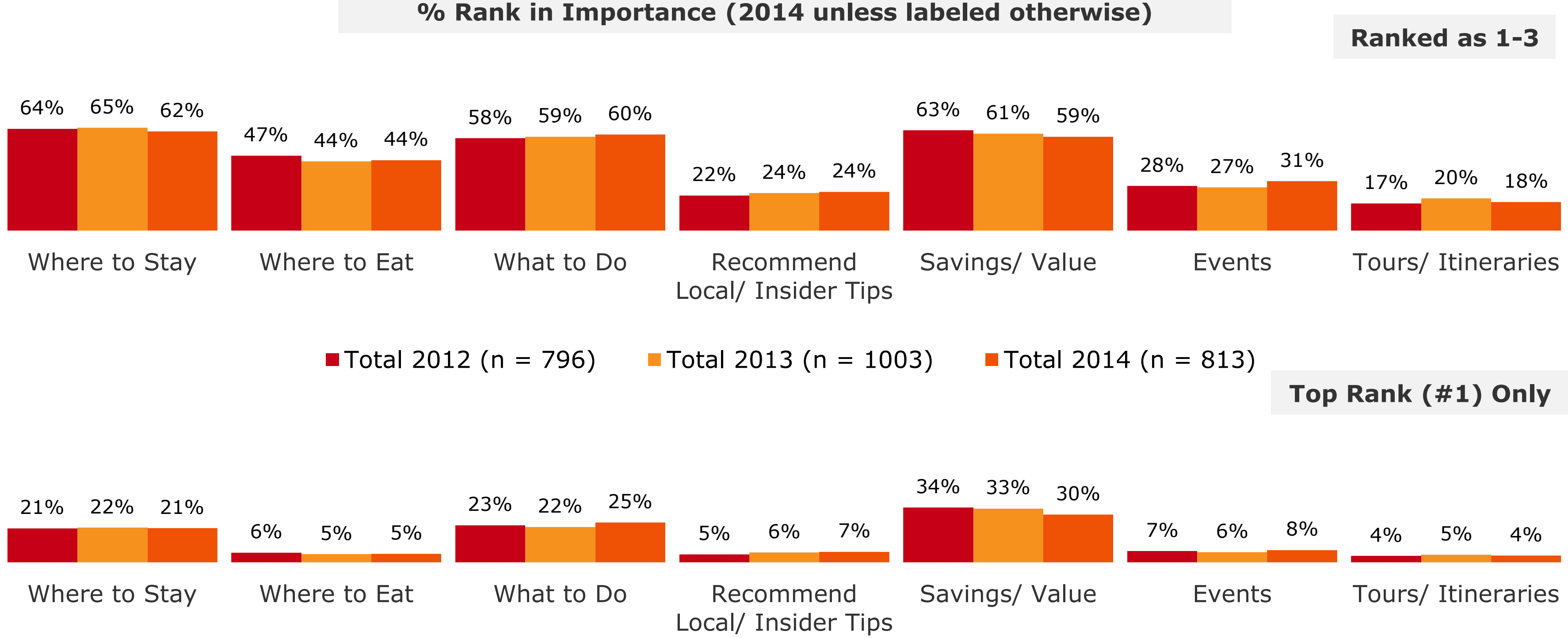


Most important features on website

The primary topics travelers consider important to research vary little over time:

- **Ranked as 1-3:** Travelers consistently rank *where to stay*, *what to do*, and *savings/value* as the most important destination website features
- **Top Rank Only:** The top ranking mimics the importance of features ranked 1-3 with *saving/value* leading other reasons, as travelers search for the best values.

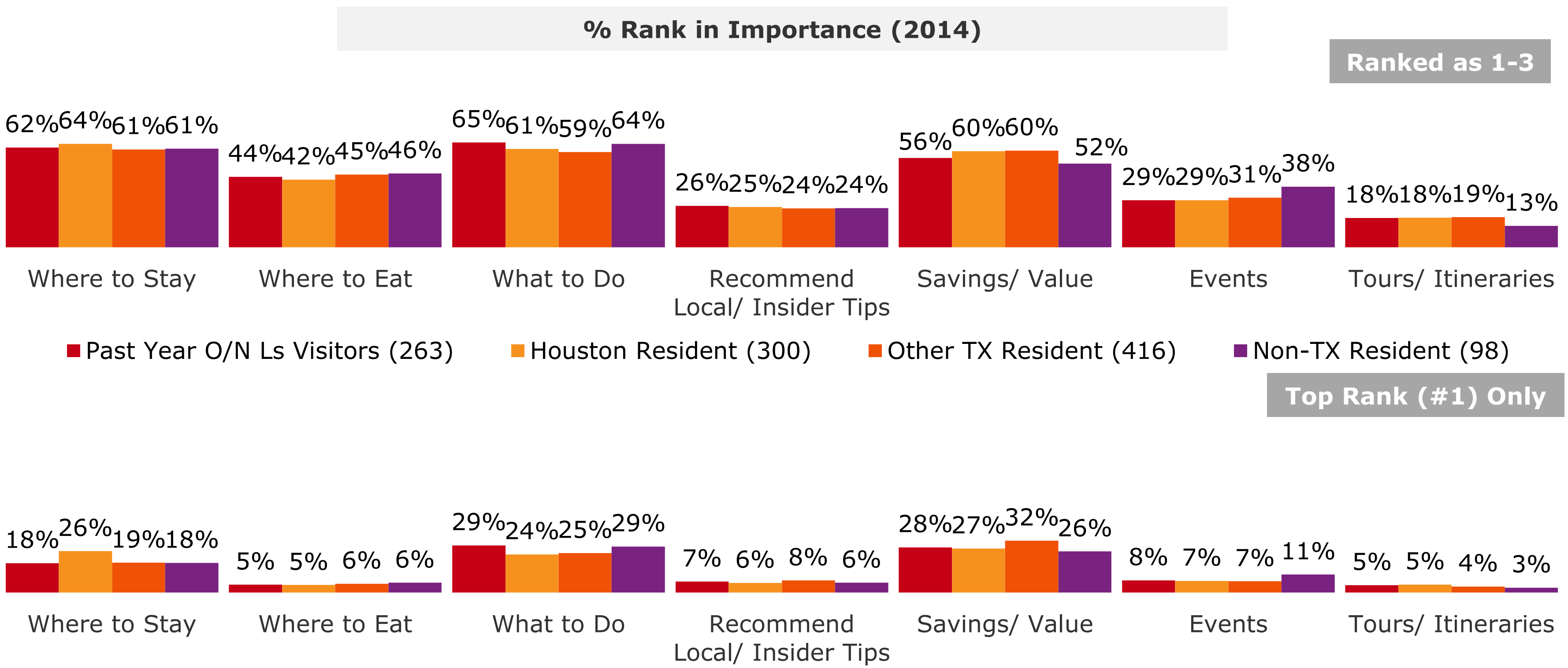
% Rank in Importance (2014 unless labeled otherwise)



Q13a. Abridged: Now, we would like you to consider travel destination websites. Please rank the 7 most important features on a travel destination website in order of importance (1=most important; 7 least important)?

Most important features on website

General Website: Regardless of group, the same items place at the top *(where to stay, what to do, savings/value).*



Q13a. Abridged: Now, we would like you to consider travel destination websites. Please choose the 7 most important features on a travel destination website and rank them in order of importance (1=most important; 7 least important)?

Other important features on Websites

General Website Features

- Only a few travelers mention website features to add to those already listed. These vary widely, but often include a desire for specific information on things to do:

Other Features Cited as Important: 2012

- Things to see/do (6):
  - Outdoor adventures
  - Theatre/concerts
  - History
  - Region wide attractions
  - Local cultural information and helpful hints
  - Nightlife
- Best way to get there; maps/directions; interactive map with roads and satellite options; traffic (5)
- Weather (4)
- Prices; total costs; coupons (4)
- Local transportation/options (3)
- Food; restaurant reviews (2)
- Guest reviews; reviews in general (2)
- User friendliness; navigation/coherence (2)
- Safety
- Place to relax
- Handicap accessibility
- Where the Gay bars are and their accessibility

Number of mentions = 1 unless in parens (#)

Other Features Cited as Important: 2013

- Things to see/do (6):
  - Good nightlife
  - Shopping
  - Things, place, points of interest
  - History – love history when travelling
  - Pool/beach availability
  - Everyone can have fun and no one needs to be excluded
- Travel related: distance from home, mode of transportation, transportation alternatives, traffic (5)
- Maps (2)
- Weather/climate (2)
- Family friendly/family discounts (2)
- Reviews: unbiased reviews/ratings/comments from those who have been there (2)
- Ability to walk to many venues
- Cleanliness
- Comments from people who have been there
- Costs
- Easy to use
- Hotel Info (extras, parking, location, services)
- Orbitz

Number of mentions = 1 unless in parens (#)

Other Features Cited as Important: 2014

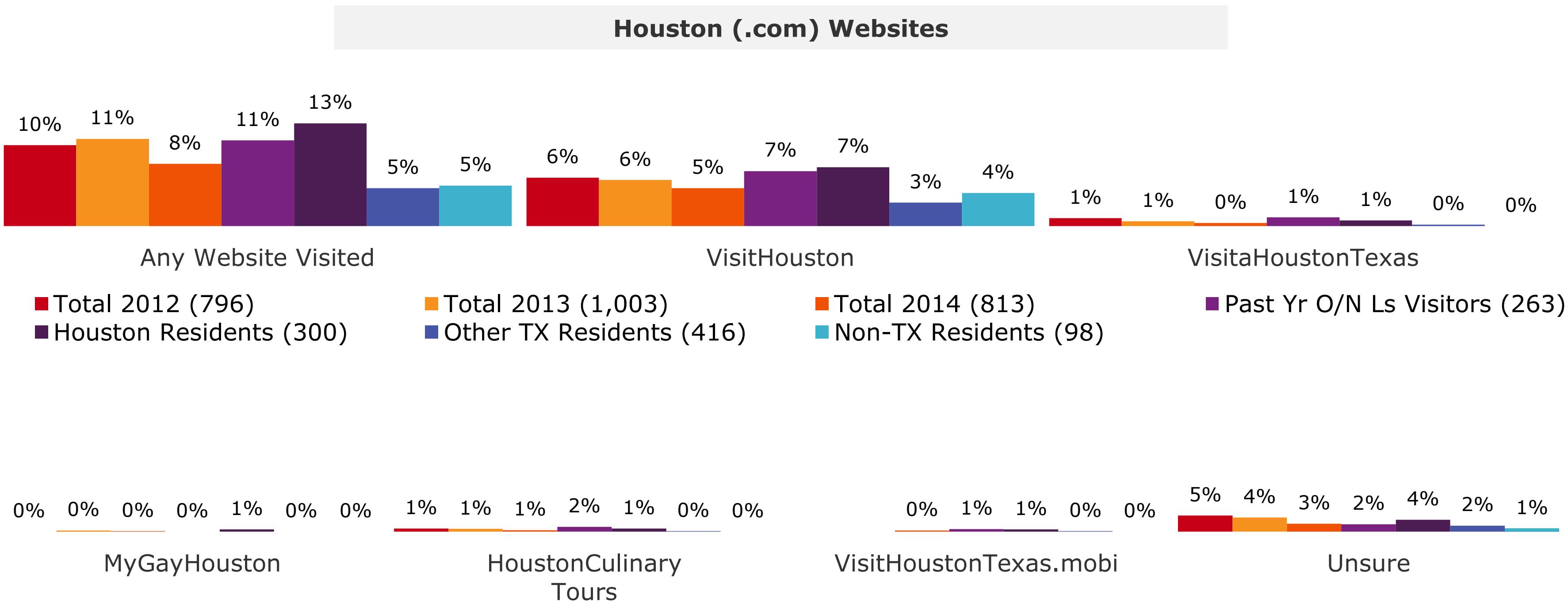
- Things to see/do (7):
  - Historic places/sites/explanations (2)
  - Broad view of current events
  - Gaming/casinos
  - Accessible areas outside of town
  - Fun things to do
  - Hunting and fishing
- Cost/value/prices (2)
- Weather/weather to know what to pack (2)
- Maps and points of interest
- Reviews: independent, unsponsored, honest reviews
- Cost of everything
- Safety
- Relaxation
- Handicap accessibility
- Pet friendliness

Number of mentions = 1 unless in parens (#)

Q13b. What other feature is important on travel destination websites?

Houston websites visited

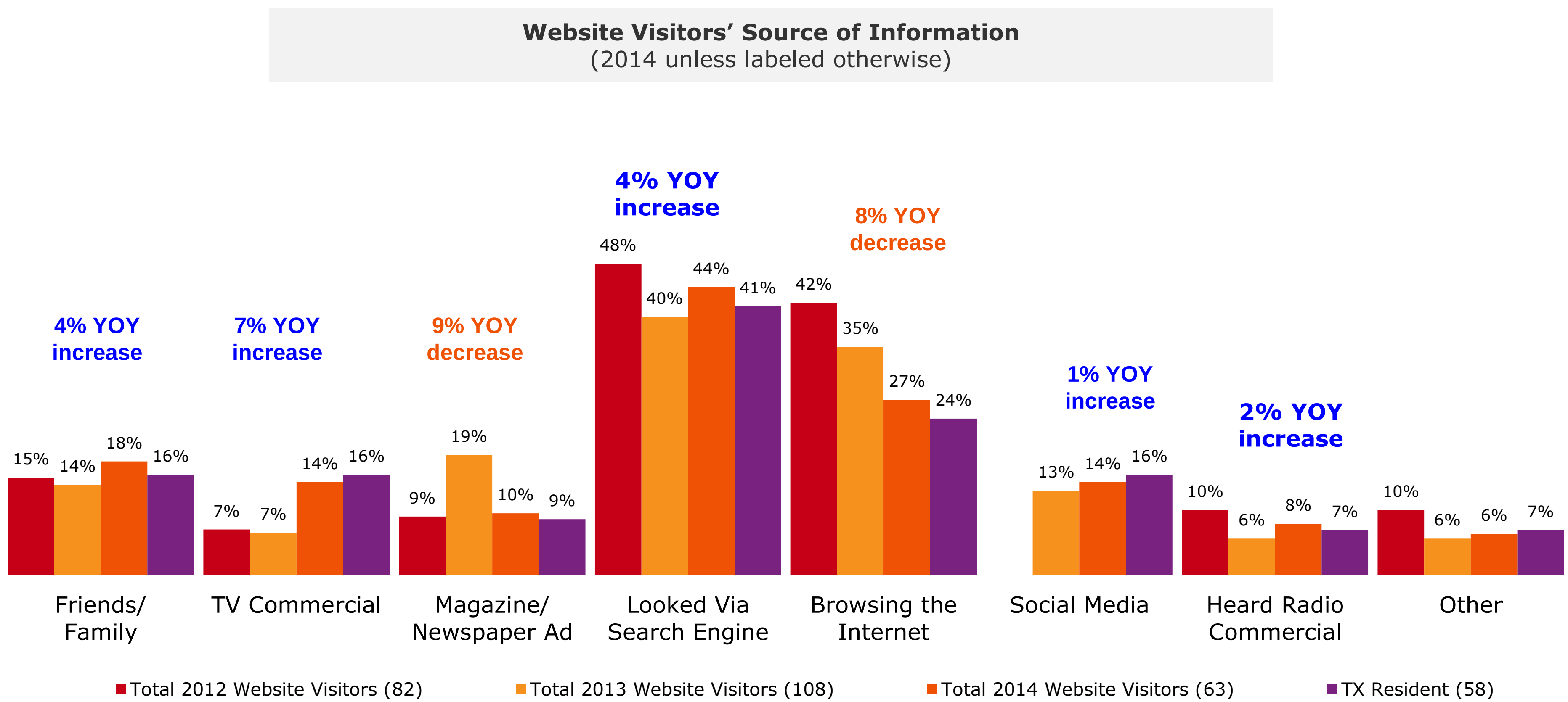
Somewhat fewer recall visiting a Houston website (8%) than in recent years, but that **level almost doubles among Houston residents.**



Q19. Which of the following websites for the Greater Houston Convention and Visitors Bureau, if any, have you visited in the past 12 months?

Houston website discovery

Most travelers find the Greater Houston CVB website ***via an Internet search***, but level of ***social media impact*** steadily climbs achieving the same raking as ***Friends and Family***.

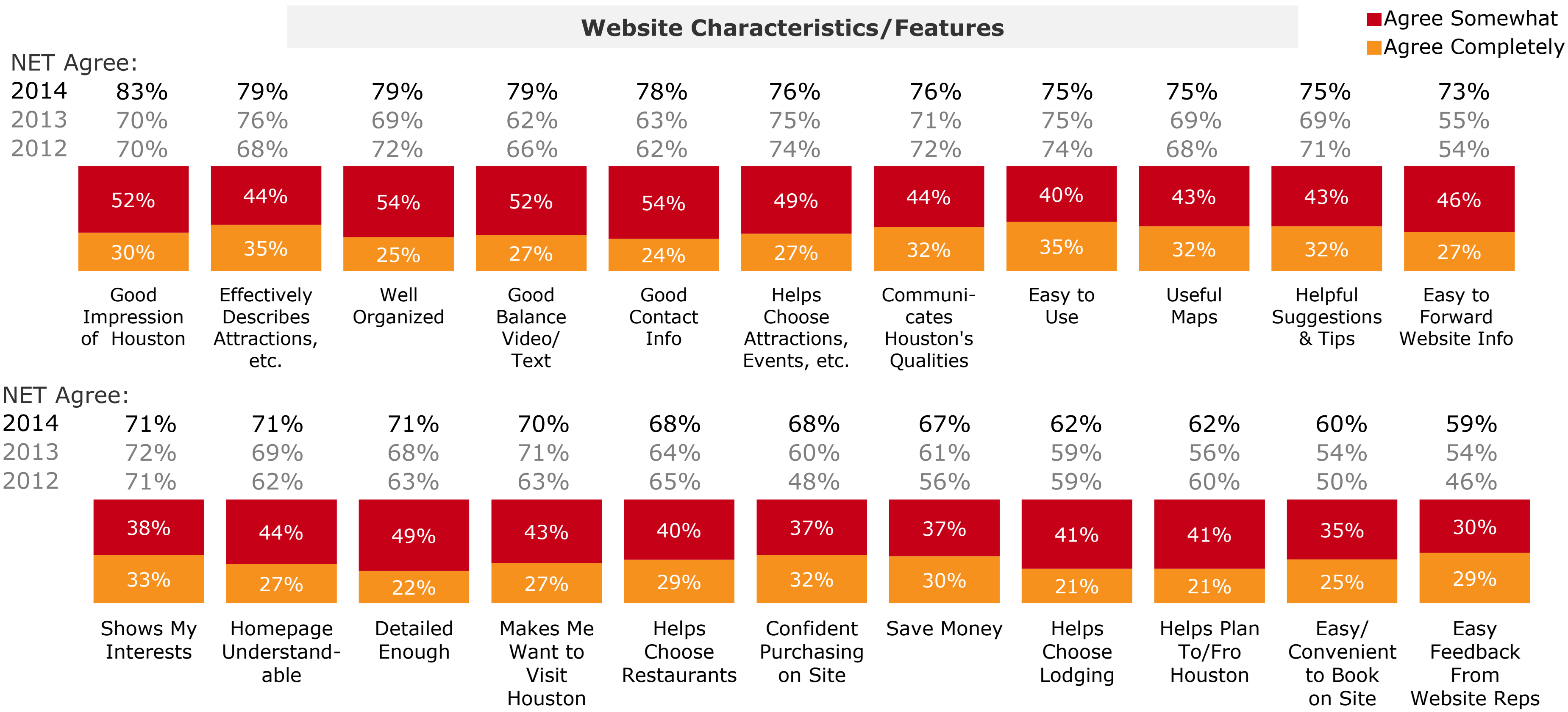


* Non-Texas residents not shown due to very small sample

Q20. Please indicate how you found out about the Houston websites?

Characteristics/features of Houston’s website

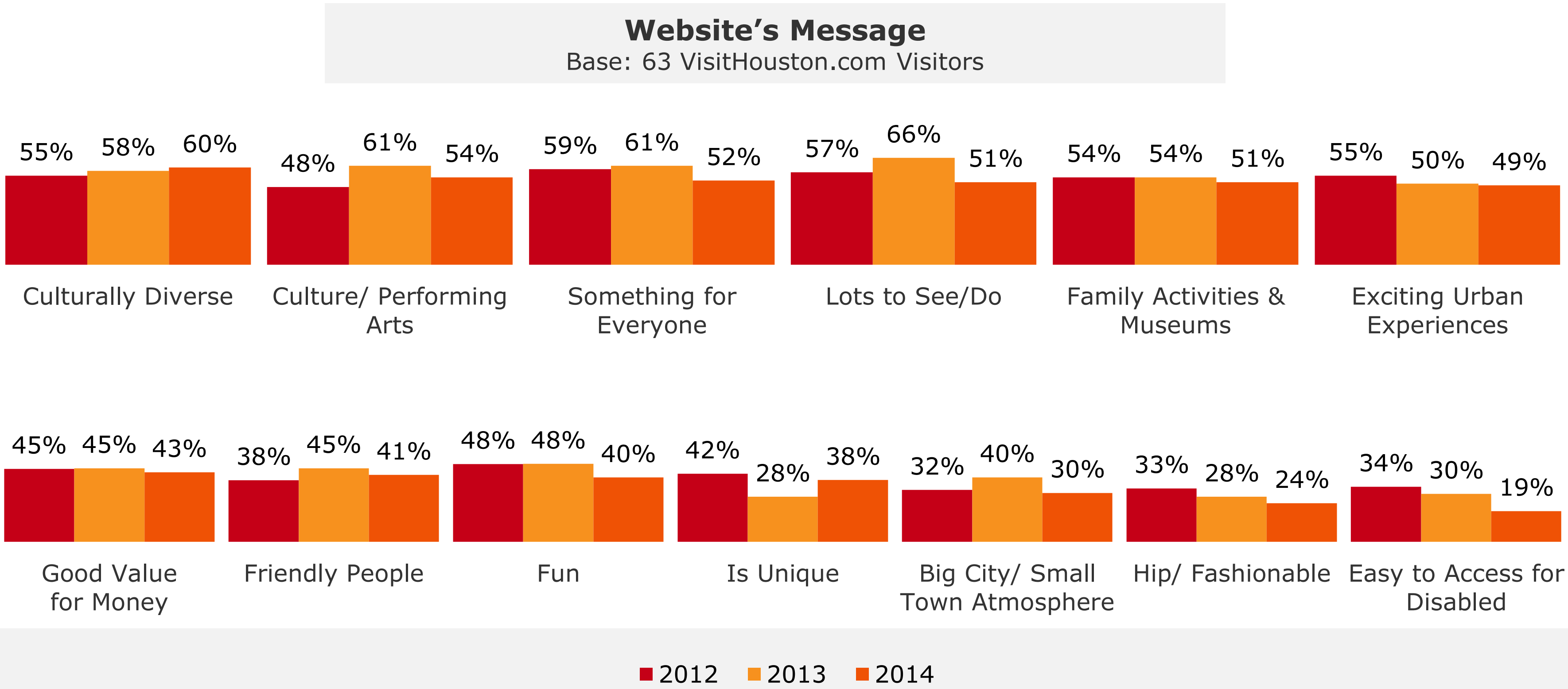
Website users agree with most statements about GHCVB’s websites, particularly ***presenting a good impression of Houston***, ***promoting local attractions***, ***well-organized and balanced***, with ***good contact information***.



Q21. How much do you agree or disagree with the following statements regarding the VisitHouston.com characteristics or features?

What the website says about Houston

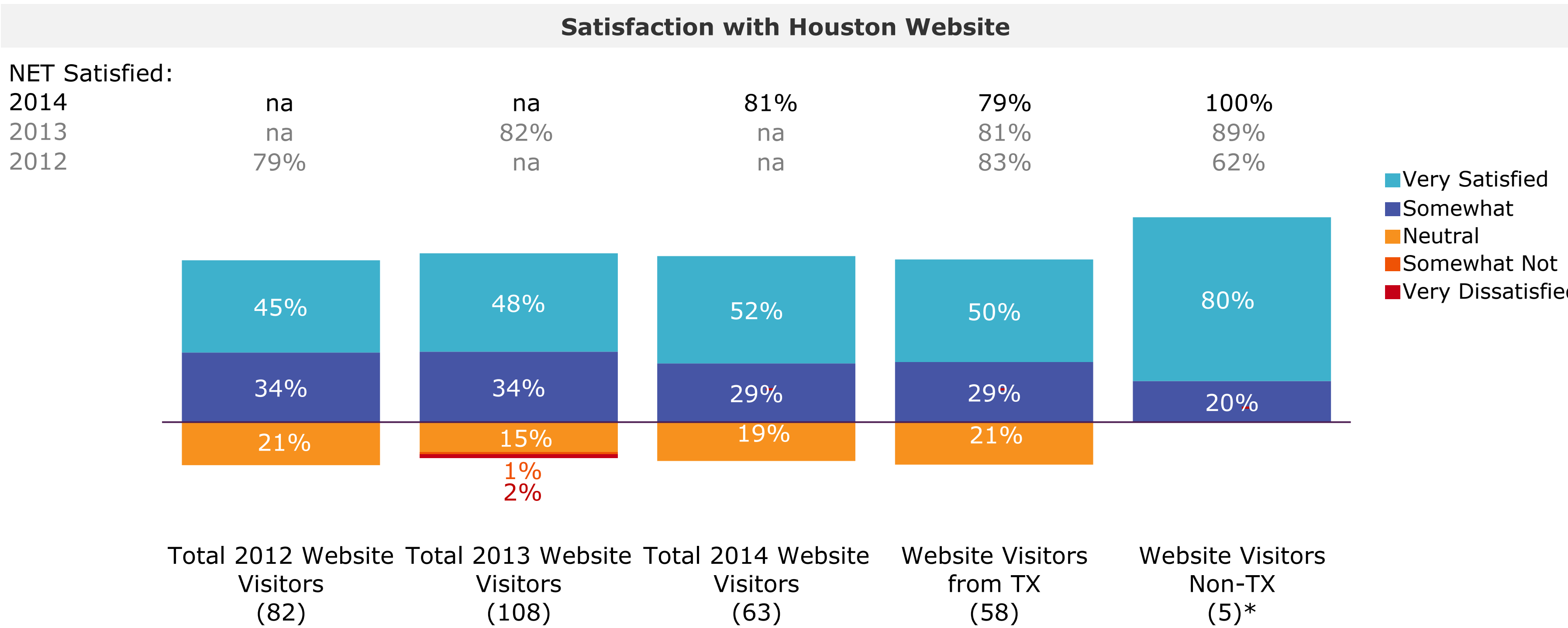
From the website, most users "take away" the ***culture*** and ***variety of activities*** available in Houston.



Q22. What does VisitHouston.com tell you about Houston?

Satisfaction with Houston website

Satisfaction with the website remains very high.



* Very small sample; treat as qualitative only

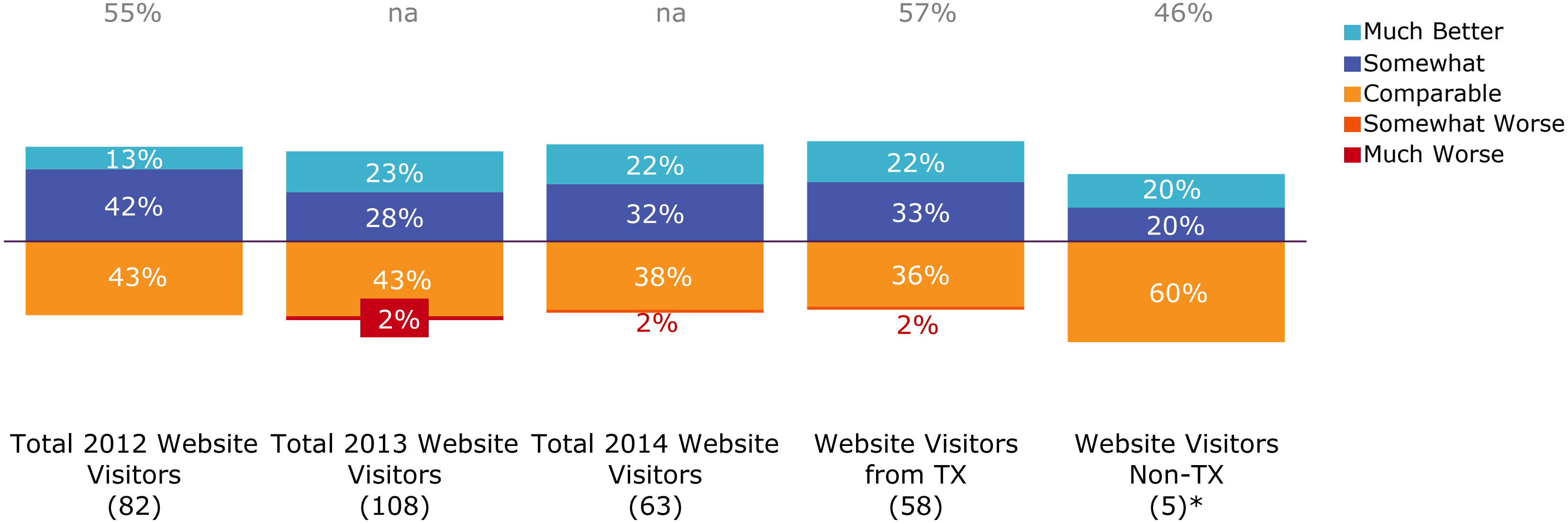
Q23. What is your overall satisfaction with the Greater Houston CVB website?

Houston's website competitive comparison

Similar to last year, slightly more than half **(54%)** of Houston's website visitors deem it ***as much or somewhat better*** than similar websites for city destinations.

Houston Website's Competition

NET Better:					
2014	na	na	54%	55%	40%
2013	na	51%	na	52%	44%
2012	55%	na	na	57%	46%



* Very small sample; treat as qualitative only

Q24. How well does the Greater Houston CVB's website compare to similar websites for city destinations?

Website features to improve

In general, most website users express satisfaction with the site, even when reflecting on possible improvements. Several suggestions include *discounts/savings* and *city information*.

Website Features to Improve: 2012

- None/nothing to improve, OK as it is, everything is fine, no complaints, can't think of anything to improve (26)
- Several mention information that they would like to see: (12)
  - Info on food, ethnic food, small, out-of-the-way specialty restaurants where locals eat (3)
  - Better maps
  - Distances to attractions
  - Expand surrounding areas of Houston
  - Be able to filter specific interests, such as free fairs
  - More info on historical places
  - More cultural information
  - Local, small business venues
  - Locate stations - best gasoline prices
  - Where is emergency medical attention
  - Show specials
  - More content in general
- Some encountered problems: (4)
  - Broken and circular links on site
  - Some info outdated
  - Seems to load somewhat slowly
  - Some links I clicked did not work
- We are Texans; where are the dancehalls?

Number of mentions = 1 unless in parens (#)

Website Features to Improve: 2013

- None/nothing to improve, easy to navigate/ very comprehensive/impressive/good site/great as is/found what I needed (36)
- Several mention information to add/improve:
  - Extra savings/more, better coupons/ discount section/bargain ads/travel deals/restaurant coupons (7)
  - Info on city: neighborhoods/people's lives/sports/improve info on city (3)
  - Maps/mapping feature/directions (3)
  - Restaurants/restaurant reviews (2)
  - More photos/visuals (2)
  - Cost/price/value of places to stay (2)
  - Current events/activities/updates (2)
  - More attractions/"out-of-the-box" things to do (2)
  - Ability to book for large families
  - Handicapped/disability section
  - Have a huge section of all the absolutely free things to do in Houston
  - Kid-friendly suggestions/activities
  - Include features of stadium, rail system,, and medical center on home page
- One website complaint:
  - Date ranges include repetitive events and small theater events don't show

Number of mentions = 1 unless in parens (#)

Website Features to Improve: 2014

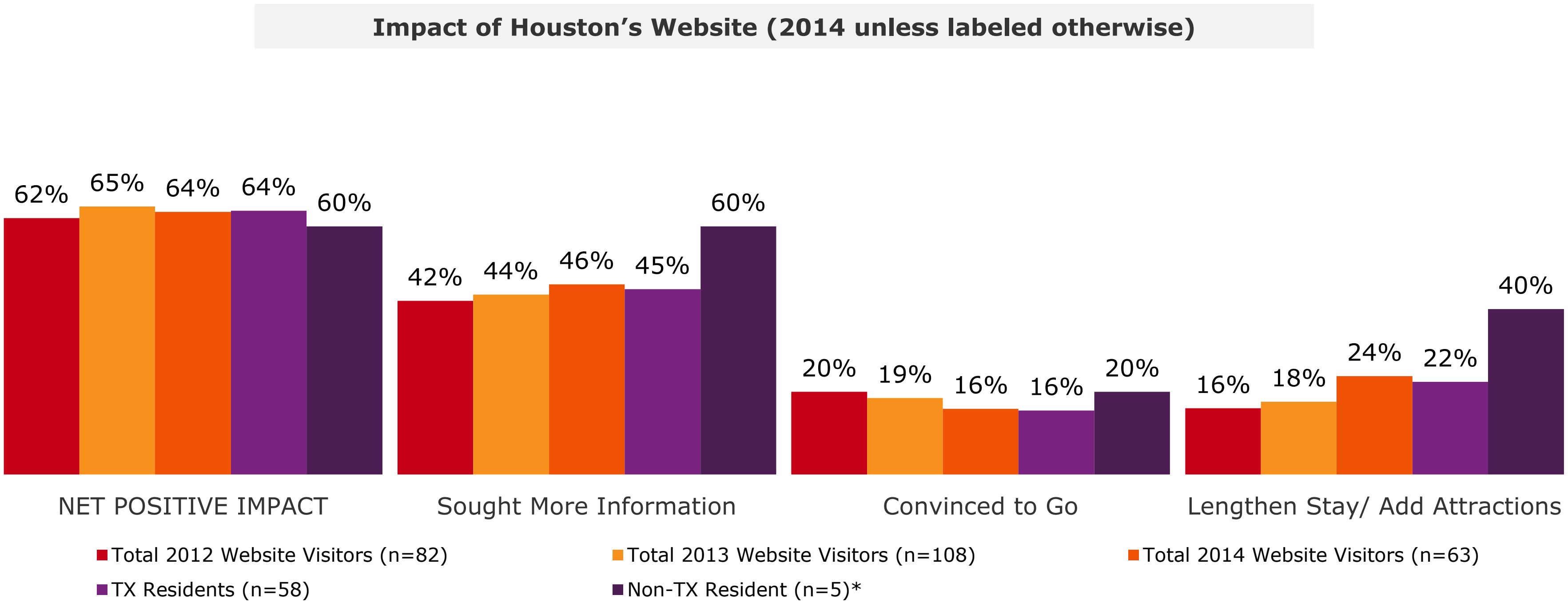
- None/nothing to improve/no need to improve/ /has everything needed/impressed by the website/very well put together website (36)
- Several mention information to add/improve:
  - Coupons or percentage off deals/ discounts per attraction because can't visit everything on city pass/ amusements with available discounts for families traveling on a budget (3)
  - Info on city: lively city/insider tips on getting around the city/pictures and maps of the city/places to visit (4)
  - Mention shipping channel and ocean nearby
  - Show the nightlife, restaurants, zoo, rockets, soccer team
  - Current attractions or events
  - Off-the-beaten-path of things to see/do
  - Tips on getting in/out of Houston's confusing airport
  - Prices of things
  - Do regular reviews and updates as changes occur
- Website complaints:
  - Needs to be faster
  - Larger fonts and less clutter
  - Search feature did not give results I expected

Number of mentions = 1 unless in parens (#)

Q25. What features or sections should the website improve?

Perceived impact of Houston's website

Two-thirds of website users positively react to Houston's website, primarily causing users to seek more information.



* Very small sample; treat as qualitative only
Q26. How did your visit to VisitHouston.com affect your leisure plans?

8

Appendix

Topics:
Satisfaction
Profiles
Trip choices and characteristics (including demos)
Purposes and Research Methods

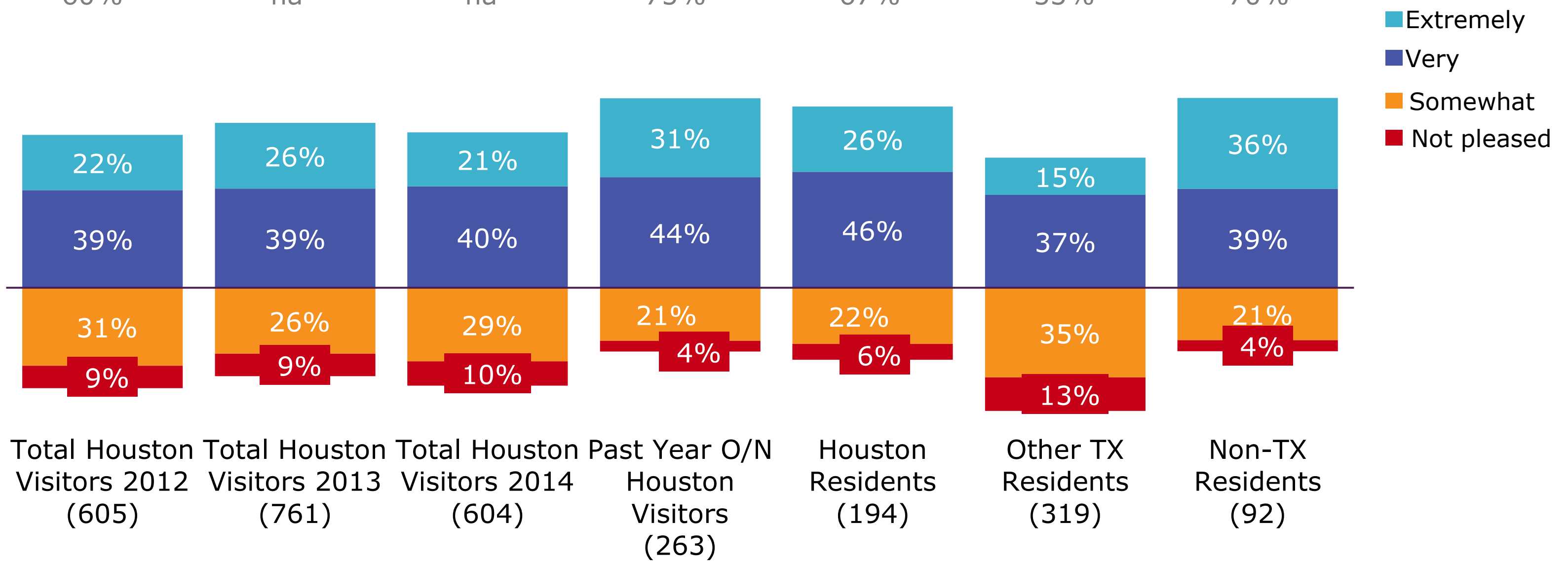
Satisfaction with Houston visit

Houston satisfies most overnight leisure visitors, especially past year overnight leisure visitors and non-Texans.

Houston

NET Top Two Box (Extremely/Very Pleased):

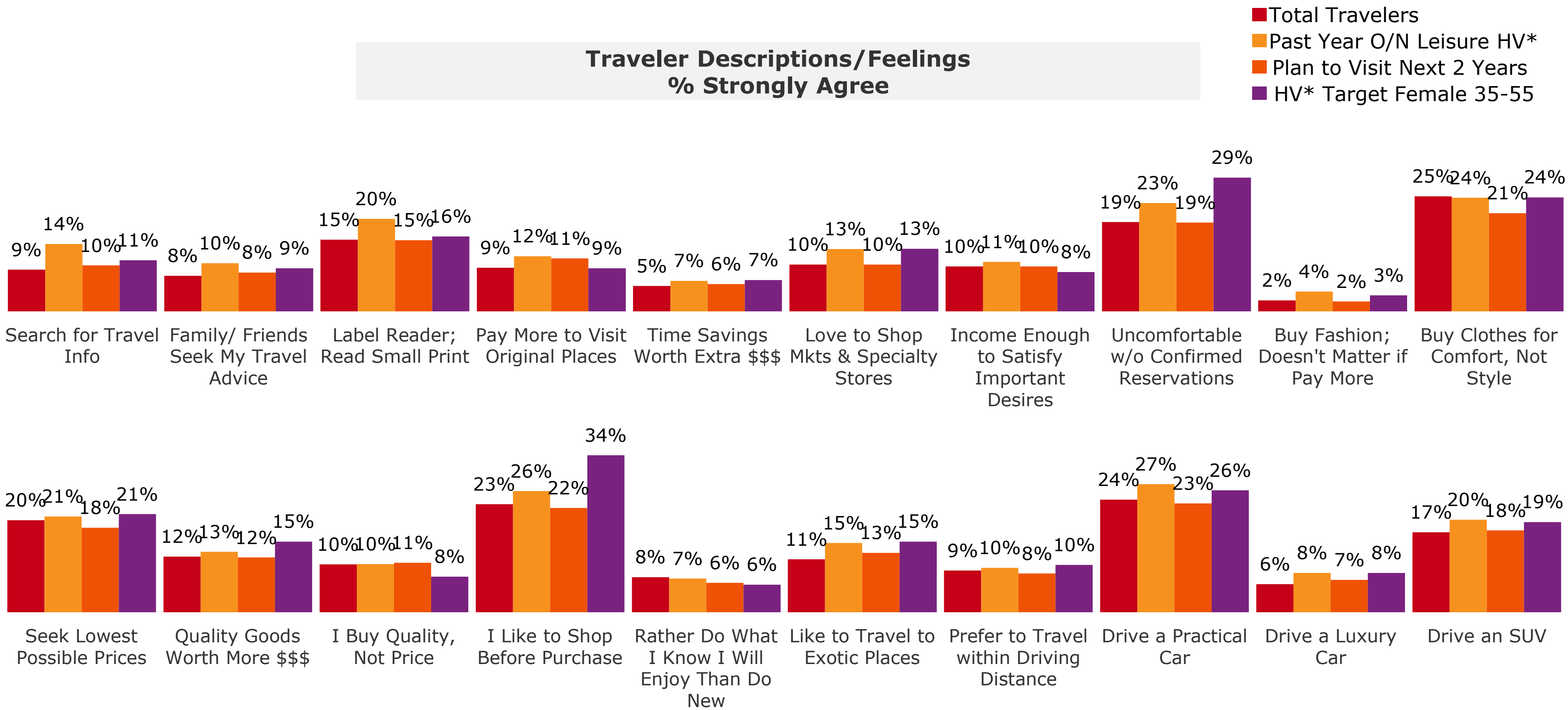
2014	na	na	61%	75%	72%	51%	75%
2013	na	65%	na	79%	76%	56%	72%
2012	60%	na	na	75%	67%	53%	70%



Q18. Overall, how pleased were you with your last overnight leisure trip to the Houston area?

General description/feelings of traveler

Although often sharing similar attitudes, visitor groups vary somewhat ***(next slide)***.



HV* = Houston Visitor

Q37. For each statement below, can you please tell me how much you agree or disagree that the statement describes you or your feelings.

General description/feelings of traveler

Houston Visitor groups vary from other travelers in these ways:

Characteristics of Target (Female Houston Visitors 35-55)

- Like to shop around before making a purchase
- Uncomfortable starting a trip without confirmed reservations for all nights
- It's worth it to pay more for quality goods
- Love to shop in markets and small, specialty stores
- Like to travel to exotic places
- Average income
- Younger

Characteristics of Travelers More Likely to Visit Houston in Next 2 Years

- Prepared to pay more to visit places that offer something really original
- Unlikely to buy clothes for comfort (rather than style)
- Buy based on quality, not price
- Do not seek lowest possible prices
- Somewhat higher incomes
- Average age

Characteristics of Recent Houston Overnight Leisure Visitors

- Drive a practical car and/or SUV
- Like to shop around before making a purchase
- Uncomfortable starting a trip without confirmed reservations for all nights
- Label reader; won't buy anything without reading the small print
- Search for information on travel destinations
- Prepared to pay more to visit places that offer something really original
- Love shopping in markets and small, specialty stores
- Like to travel to exotic places
- Somewhat higher incomes
- Average age

Q37. For each statement below, can you please tell me how much you agree or disagree that the statement describes you or your feelings.

Trips to Houston

Logical Patterns Occur for Types of Trips to Houston:

- Houston residents, living within close proximity to city events and attractions, take far more day trips than residents outside of Houston
- Visitation remains rather stable – both day (36%) and overnight trips (32%)
- While most do not spend the night, they usually (57%) opt for a hotel if they do. Those outside Texas stay longer per trip.

	Total 2012 (n=796)	Total 2013 (n=1,003)	Total 2014 (n=813)	Past Yr. O/N Leisure Visitors (n=263)	Houston Residents (n=300)	Other Texas Residents (n=416)	Non-Texas Residents (n=98)
Day Trips							
NET Any	36%	40%	36%	55%	59%	21%	28%
Mean (Inc. 0)	2.5	2.8	2.0	3.0	4.5	0.4	1.6
Mean (Excl. 0)	6.8	7.0	5.7	5.6	7.6	1.8	2.0
Overnight Trips							
NET Any	34%	37%	32%	100%	25%	27%	76%
Mean (Inc. 0)	1.4	2.0	1.2	3.8	1.7	0.6	2.4
Mean (Excl. 0)	4.2	5.3	3.8	3.8	6.9	2.0	3.2
Hotel Nights in Houston							
% With a Hotel Stay in Houston	19%	22%	18%	57%	13%	17%	42%
% of Houston O/Ns w/ Hotel Stay	57%	59%	57%	57%	51%	61%	55%
Average Total Hotel Nights (if any)	4.6	4.1	2.9	2.9	2.3	2.6	3.9
Average Hotel Nights/Trip (if any)	3.0	3.3	2.4	2.4	2.0	2.1	3.2

Q14. Please indicate the total number of leisure trips you have made to the Houston area in the past 12 months.
Q14a. Of all your overnight trips to Houston in the past 12 months, how many total nights did you stay in a hotel?
Q14b. On your last overnight trip to Houston, how many total nights did you stay in a hotel?

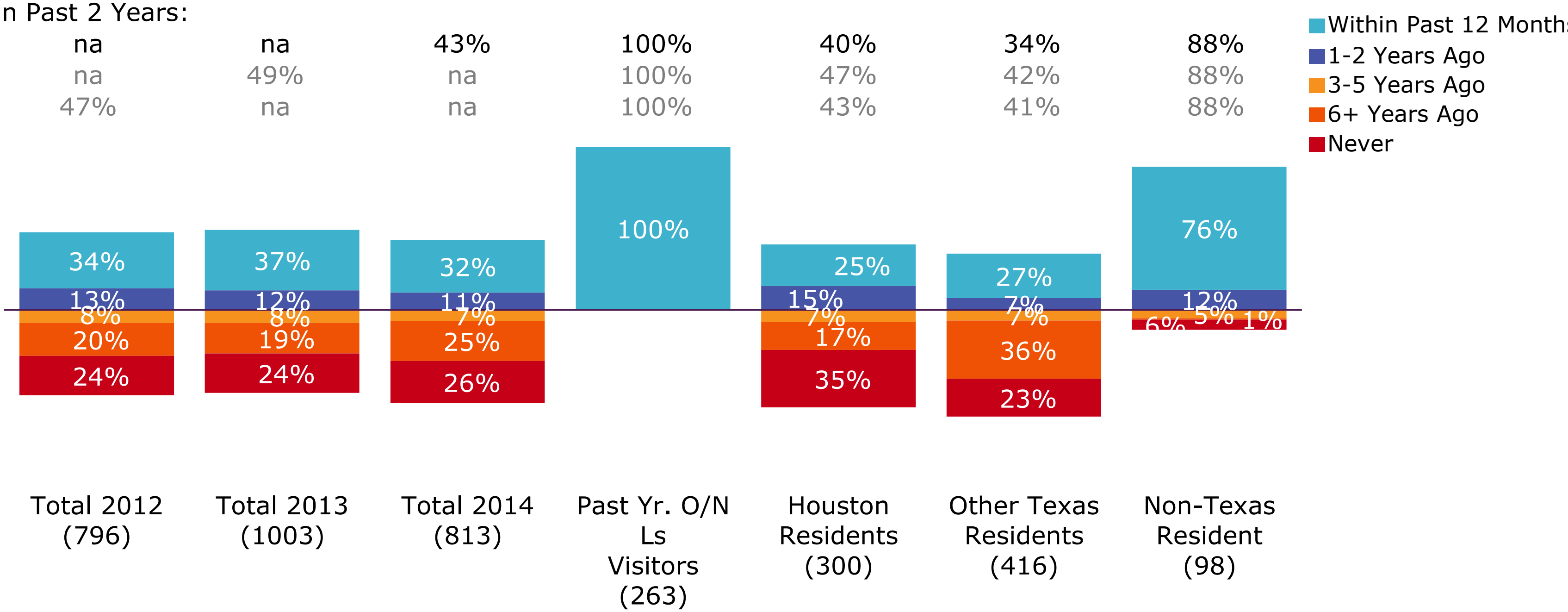
Recency of last overnight leisure trip to Houston

Slipping a bit from prior waves, somewhat fewer than half have visited Houston in the past 2 years.

Elapsed Time Since Last Houston Overnight Visit (2014 unless labeled otherwise)

NET Within Past 2 Years:

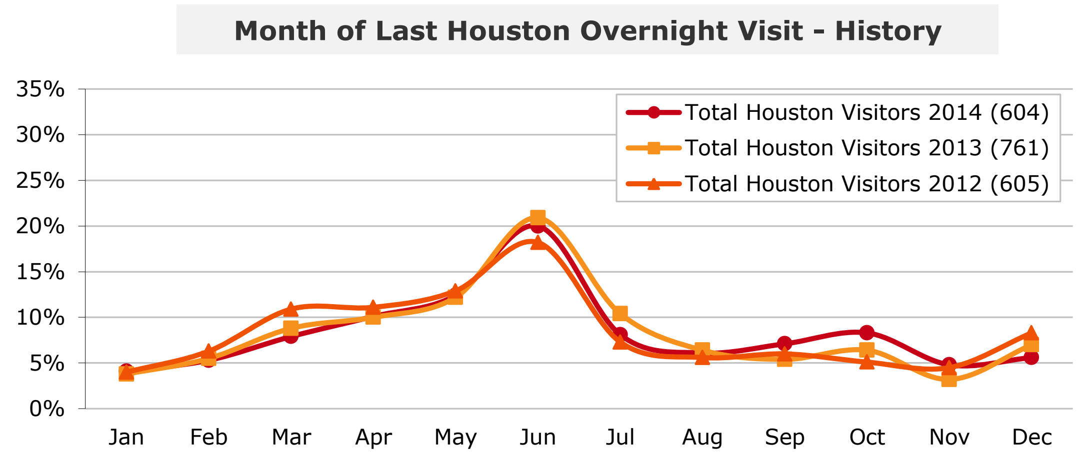
	Total 2012	Total 2013	Total 2014	Past Yr. O/N Ls Visitors	Houston Residents	Other Texas Residents	Non-Texas Resident
2014	na	na	43%	100%	40%	34%	88%
2013	na	49%	na	100%	47%	42%	88%
2012	47%	na	na	100%	43%	41%	88%

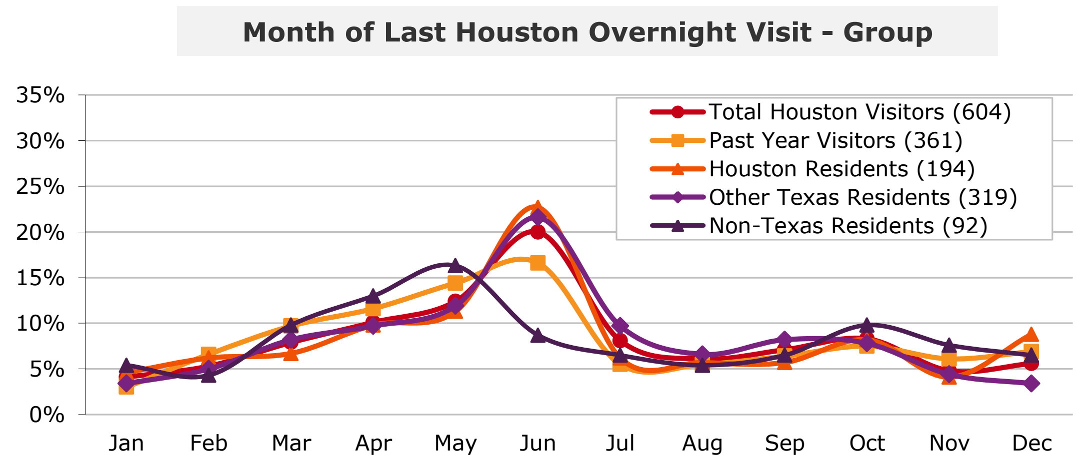


By definition: Must have visited Houston in past 5 years, business or leisure, overnight not required
Q15. When was your last overnight leisure trip to the Houston area?

Timing of last visit to Houston

- Historically, a gradual increase in Houston visitation occurs throughout the spring and peaks in the summer months (notably June), followed by a sharp drop.





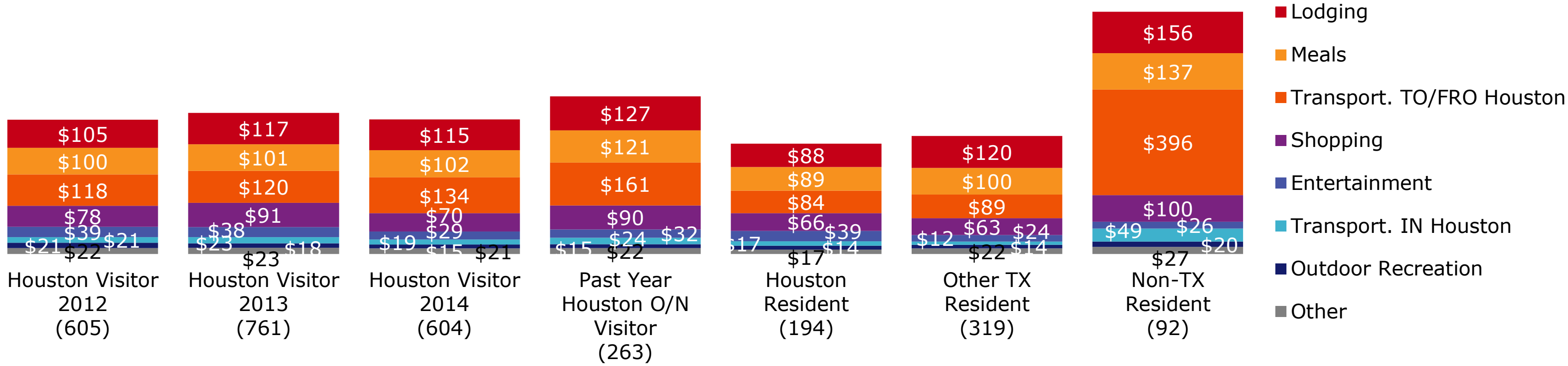
Q16. What was the month of your last overnight leisure trip to the Houston area?

Overnight spending amounts to visit Houston

Important points by overnight spending categories:

- Non-Texan visitors spend double the amount of their Texan counterparts and remains much higher even excluding transportation
- Overnight Non-Houston Texans spend a bit more than Houston residents
- Total spending hovers near the level of the past two years ($505).

Total Travel Party Overnight Spending on Last Trip to Houston
(Column Height Impacted by Expenditure)



	Houston Visitor 2012	Houston Visitor 2013	Houston Visitor 2014	Past Year Houston O/N Visitor	Houston Resident	Other TX Resident	Non-TX Resident	
2014	**na**	**na**	**$505**	**$592**	**$414**	**$443**	**$910**	**Average Total Spending**
	na	**na**	**$371**	**$430**	**$330**	**$354**	**$514**	**Average exc. Travel To/Fro Houston**
2013	na	$530	na	$621	$426	$471	$952	**Average Total Spending**
	na	$410	na	$485	$377	$374	$600	**Average exc. Travel To/Fro Houston**
2012	$503	na	na	$606	$430	$451	$823	**Average Total Spending**
	$385	na	na	$461	$364	$358	$520	**Average exc. Travel To/Fro Houston**

Q17. Please estimate the dollars your travel party spent for each of the categories below on your last overnight leisure trip to Houston?

The typical Houston visitor

Plan to Visit Houston (Next 2 Years)	Prime (Lucrative) Houston Visitors (Past Year O/N Visitors)	Target/Core Visitors (Females 35-55)	Typical US Traveler
■ Age 57 ■ Higher Income ($77,300) ■ Married (68%) ■ College Grad (52%) ■ Caucasian (83%) ■ Will pay more to visit original places ■ Buy on quality, not on price	■ Age 56 ■ Higher Income ($77,100) ■ Married (69%) ■ College Grad (53%) ■ Caucasian (81%) ■ Drive a practical car and/or SUV ■ Like to shop before making a purchase ■ Uncomfortable starting a trip without confirmed reservations for all nights ■ Label reader; read the fine print ■ Search for travel information ■ Pay more to visit places that offer something original ■ Love to shop markets/ specialty stores ■ Like to travel to exotic places	■ Age 47 ■ Average Income ($71,700) ■ Married (71%) ■ College Grad (44%) ■ Caucasian (76%) ■ Like to shop before making a purchase ■ Uncomfortable starting a trip without confirmed reservations for all nights ■ Worth it to pay more for quality goods ■ Love to shop markets/specialty stores ■ Like to travel to exotic places ■ More likely to access social media daily ■ Least likely to read print, especially newspapers	■ Age 48 ■ Average Income ($75,000) ■ Married (57%) ■ College Grad (49%) ■ Caucasian (86%)

Demographics

Characteristics vary slightly by residence:

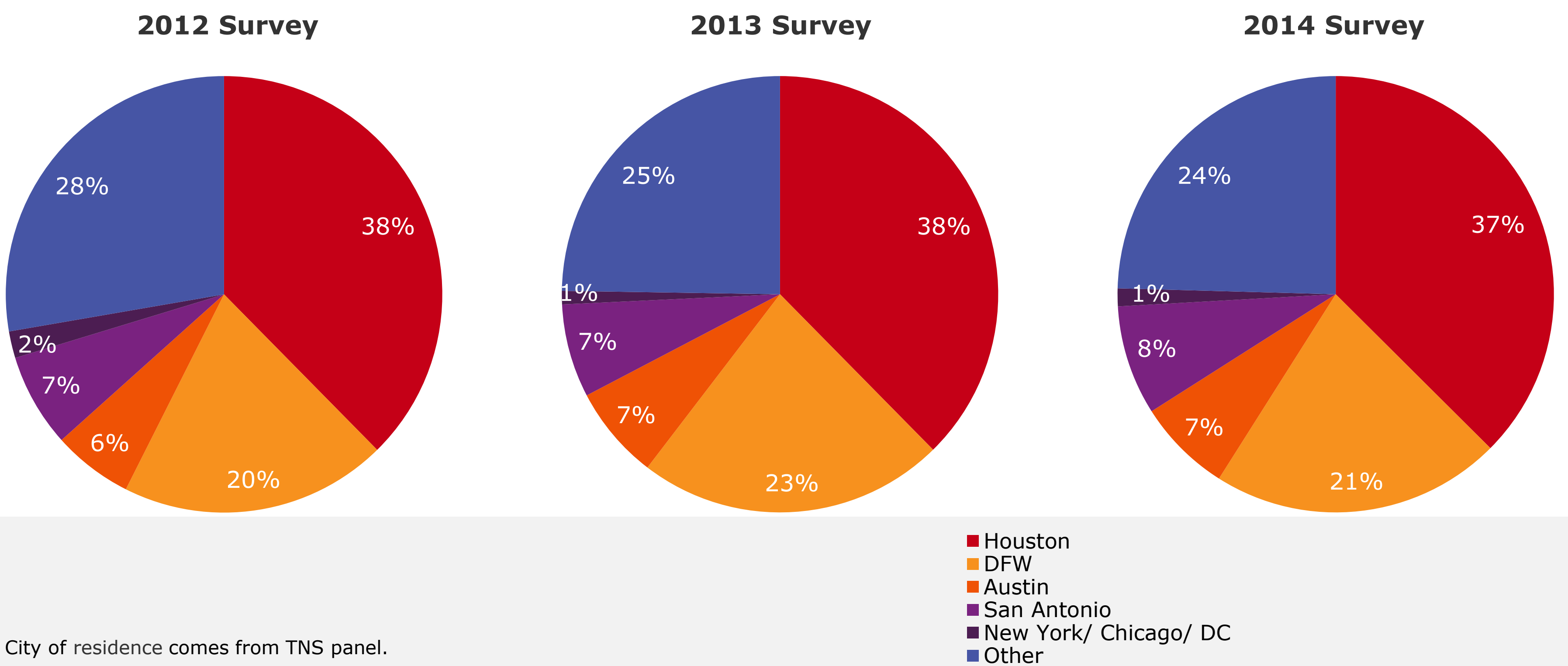
- Non-Texas residents continue to report higher income and education levels than Texas residents
- Houston shows more ethnic diversity than other Texas areas.

2014 Survey Demographics	All Travelers	Past Yr. O/N Leisure Visitors	Houston Residents	Other Texas Residents	Non-Texas Residents	Website Visitor
Average Age	58	56	57	59	56	54
Average Hhld Income	$72,157	$77,090	$74,155	$69,940	$75,579	$76,190
% Male	33%	32%	28%	37%	27%	32%
% Married	64	69	66	63	64	65
% College Grads+ (Males)	47	53	43	49	55	57
Ethnicity						
% Caucasian	85%	81%	82%	88%	83%	62%
% Spanish Origin	5	6	4	7	-	8
% African-American	7	10	11	5	10	19
2013 Survey						
Average Age	55	54	55	54	58	53
Average Hhld Income	$73,023	$78,147	$73,150	$71,056	$80,854	$77,106
% Male	30%	29%	30%	29%	33%	30%
% Married	65	66	65	65	67	73
% College Grads+ (Males)	45	53	46	42	53	49
Ethnicity						
% Caucasian	82%	76%	79%	84%	86%	67%
% Spanish Origin	7	7	6	9	2	10
% African-American	9	12	10	7	9	16
2012 Survey						
Average Age	55	54	55	55	54	52
Average Hhld Income	$72,258	$77,111	$73,077	$68,910	$83,100	$69,238
% Male	34%	38%	34%	33%	36%	37%
% Married	64	66	61	65	69	56
% College Grads+ (Males)	35	45	32	34	51	33
Ethnicity						
% Caucasian	87%	84%	85%	89%	83%	77%
% Spanish Origin	5	6	6	6	1	10
% African-American	7	9	7	6	11	13

QA. What is your age? // QB. Are you . . . (male/female) // Panel: Income, Education, Marital Status, Ethnicity.

Residence

Mirroring the past, three quarters (75%) of those in key markets live in one of the major Texas DMAs; more than a third live in Houston (37%).



City of residence comes from TNS panel.

Purposes of research

TNS is pleased to present the sixth follow-up survey of Houston visitors measures the "whys behind visitation," advertising effectiveness/ROI, and web usability:

- Travel planning
- Perceptions, motivators, and interest in Houston vs. competitors
- Media usage
- Awareness, recall, and influence of ads: print, banner, and television
- Impact of website on brand, affinity, and purchase intent.

In addition, results from TNS' nationwide TravelsAmerica syndication, conducted continuously throughout the year, enables the Greater Houston CVB to assess visitor volumes and build a profile of leisure visitors to the area, specifically:

- Volume and source of visitors
- Basic demographics: age, number of people in household, average household income
- Trip characteristics: day vs. overnight, business travel, travel expenditures, length of stay, activities selected
- Mode of transportation: air, own auto/truck, and other choices
- Visitor residence by state and selected DMAs.

Research methods – follow-up survey

For the follow up survey, three groups who had completed the TravelsAmerica study in 2008-2013 were re-contacted to participate in the follow-up study. Those groups include:

- Texas residents
- Houston residents
- Houston overnight leisure visitors

The field period ran June 16 – June 23, 2014, similar to prior years (June 27-July 9, 2013, June 28-July 5, 2012, and May 16-26, 2011).

# of Respondents 2011	# of Respondents 2012	# of Respondents 2013	# of Respondents 2014	Sample Group
404	270	372	263	Past Year Overnight Leisure Visitors (subset of total)
296	299	378	300	Houston Residents
829	397	505	416	Texas Residents Outside Of Houston
109	100	120	98	Non-Texas Residents Who Have Visited Houston
1,234	796	1,003	813	Total

9

Appendix II

Topics: Results from CY 2013 TravelsAmerica for Houston Visitors

Volume of visitors (person-trips)

Compared to 2012, 2013 visitor volume climbs in the US. Texas posts a smaller gain and Houston nearly stays in place. Quarterly volume continues to be quite volatile.

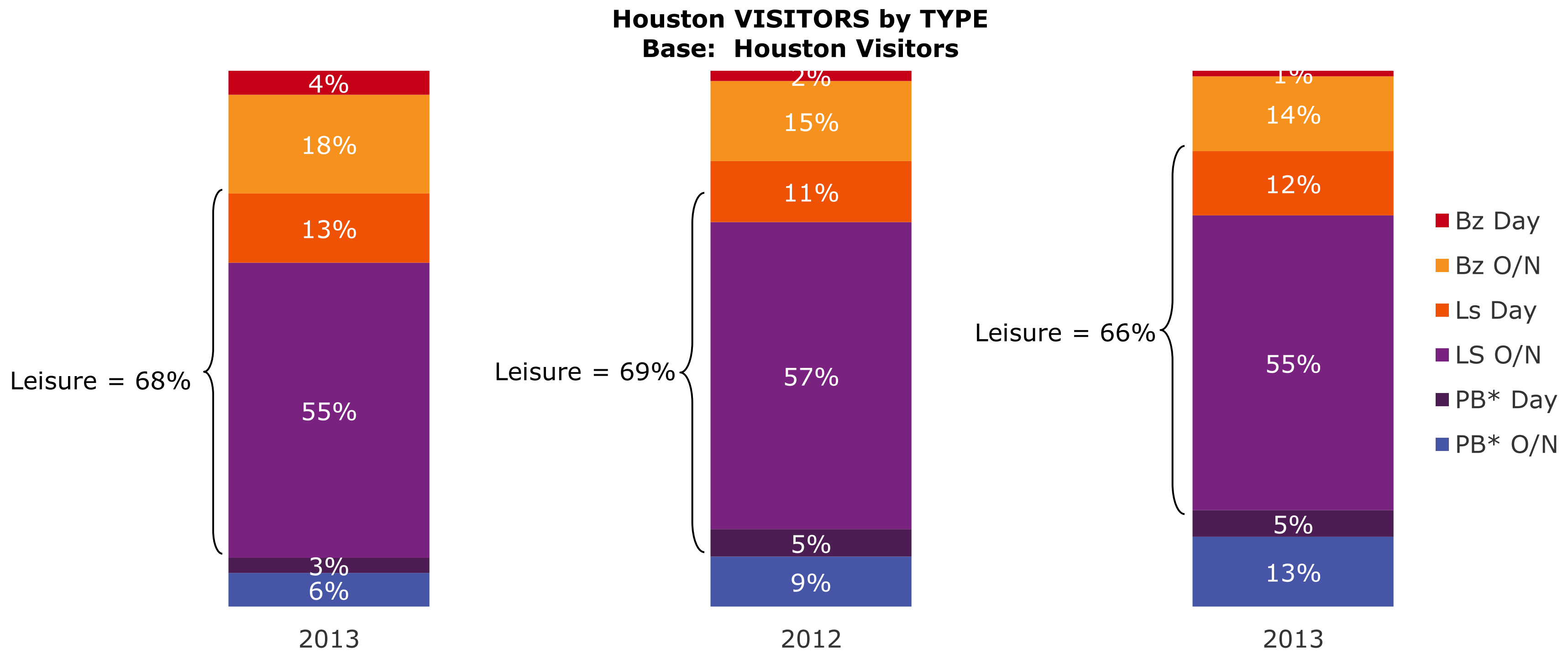
Type of Person Trips (Visitors)	CY 2013	CY 2012	CY 2011	CY 2010	CY 2009	2013 - 2012 % Change
Total US	1,185,241,000	1,107,720,000	1,143,376,000	1,085,333,000	1,062,373,000	7%
Total Texas	83,961,000	80,843,000	84,102,000	83,751,000	80,494,000	4%
Total Houston	13,359,000	13,484,000	14,742,000	12,851,000	13,297,000	-1%
Q1	3,111,000	4,057,000	3,061,000	2,881,000	2,870,000	-23%
Q2	3,371,000	2,718,000	4,103,000	2,655,000	3,421,000	24%
Q3	3,039,000	3,810,000	4,166,000	3,482,000	2,544,000	-20%
Q4	3,837,000	2,899,000	3,412,000	3,833,000	4,462,000	32%

***note 2011 Final Four**

Q4a. Please indicate the US state(s) visited (Person Trips - proj.) (day or overnight trip)
Q4d. Please indicate the US cities(s) visited (Person Trips - proj.) (day or overnight trip)

Visitor types

Leisure remains the primary purpose for travel to Houston – at least two-thirds of visitors. More shift to personal business visits than seen in past years. The majority of trips (82%) continue to include at least one overnight stay.



PB*: Personal Business/Other
Total: Day 32%; Overnight 68%
Leisure: Day 21%; Overnight 80%

Q1b. Please select the primary purpose for trips . . . (demo wtd; trip level)

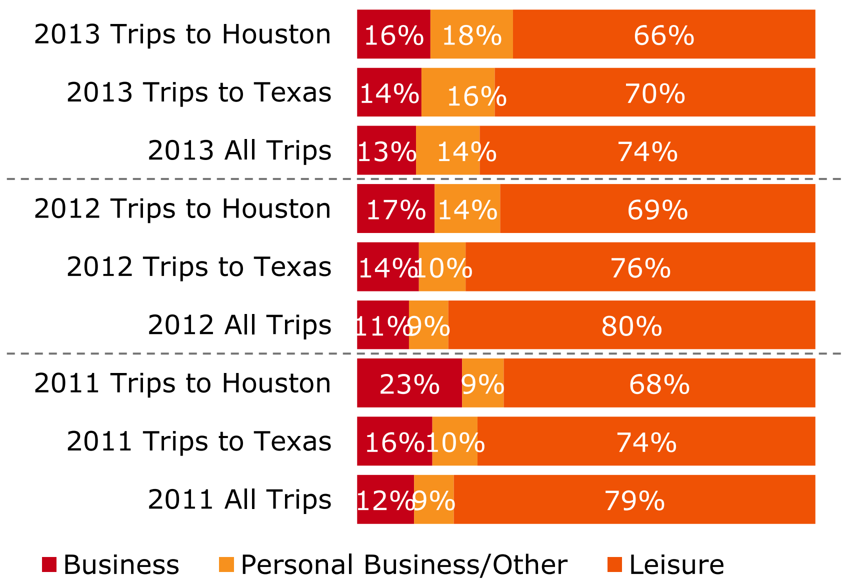
Trip purpose/visitor source

Overall:

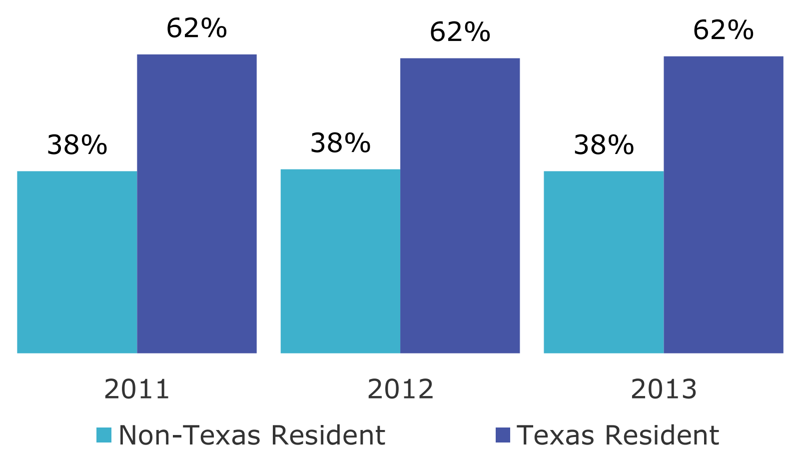
- Two-thirds (66%) of Houston visitors primarily visit for leisure, but Houston hosts a larger share of business travelers than average Texas or US cities
- Mirroring the past, more than half (62%) of Houston visitors live in Texas.

Trip/Visitor Characteristics
% of Visitors to State

TYPE OF TRIP
Base: Visitors to Houston; Texas; US



LOCATION OF RESIDENCE
Base: Visitors to Houston

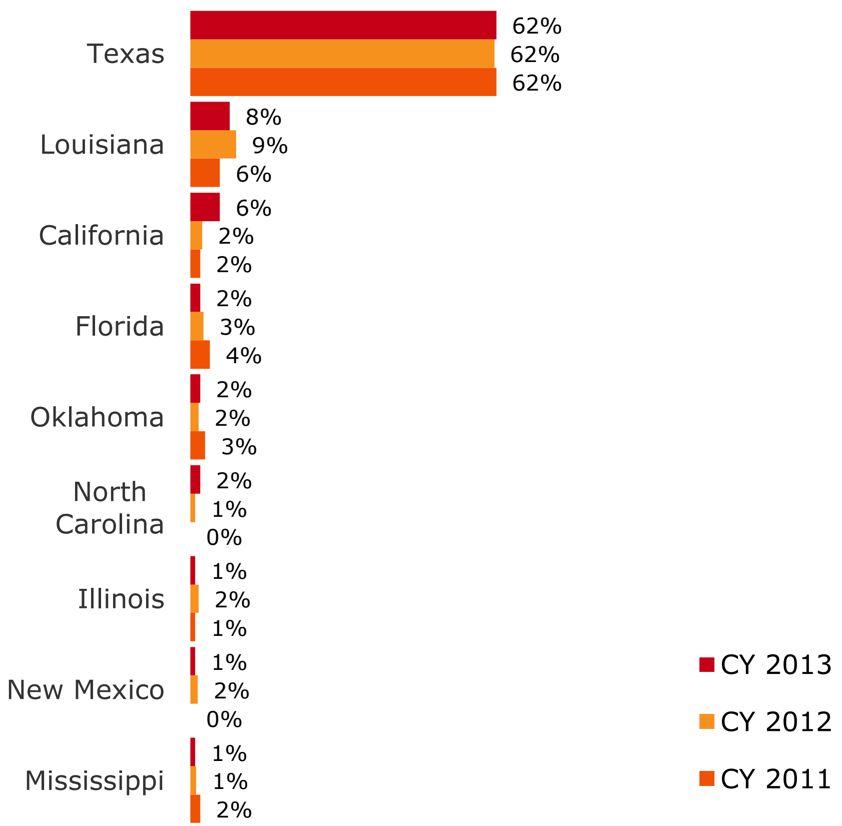


Q1b. Which of the following was the PRIMARY purpose of trip to . . . (Household Trip Level – demo wtd, not adjusted for travel party size)
Panel: Residence of visitors (Household Level)

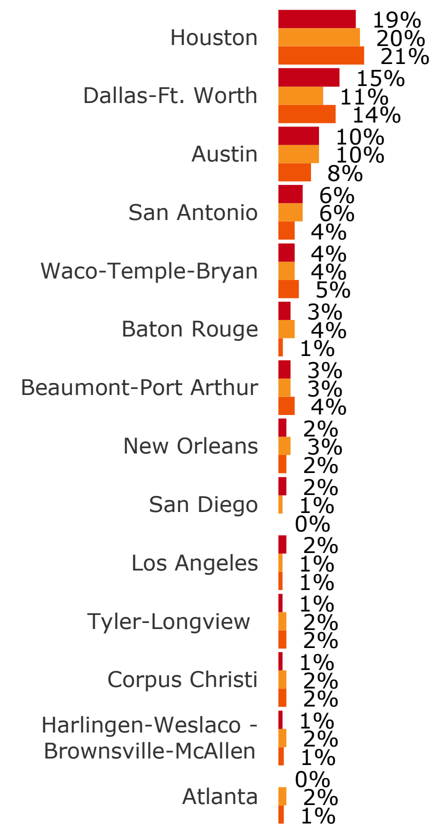
Visitor source by state/DMA

Proximity Counts: As with previous years most visitors (62%) live in Texas. California residents account for the largest increase in out-of-state visitation.

Source of Visitors: Top States (2%+)
Base: Visited Houston
% of Visitors Residing in . . .



Source of Visitors: Top DMAs (2%+)
Base: Visited Houston
% of Visitors Residing in . . .

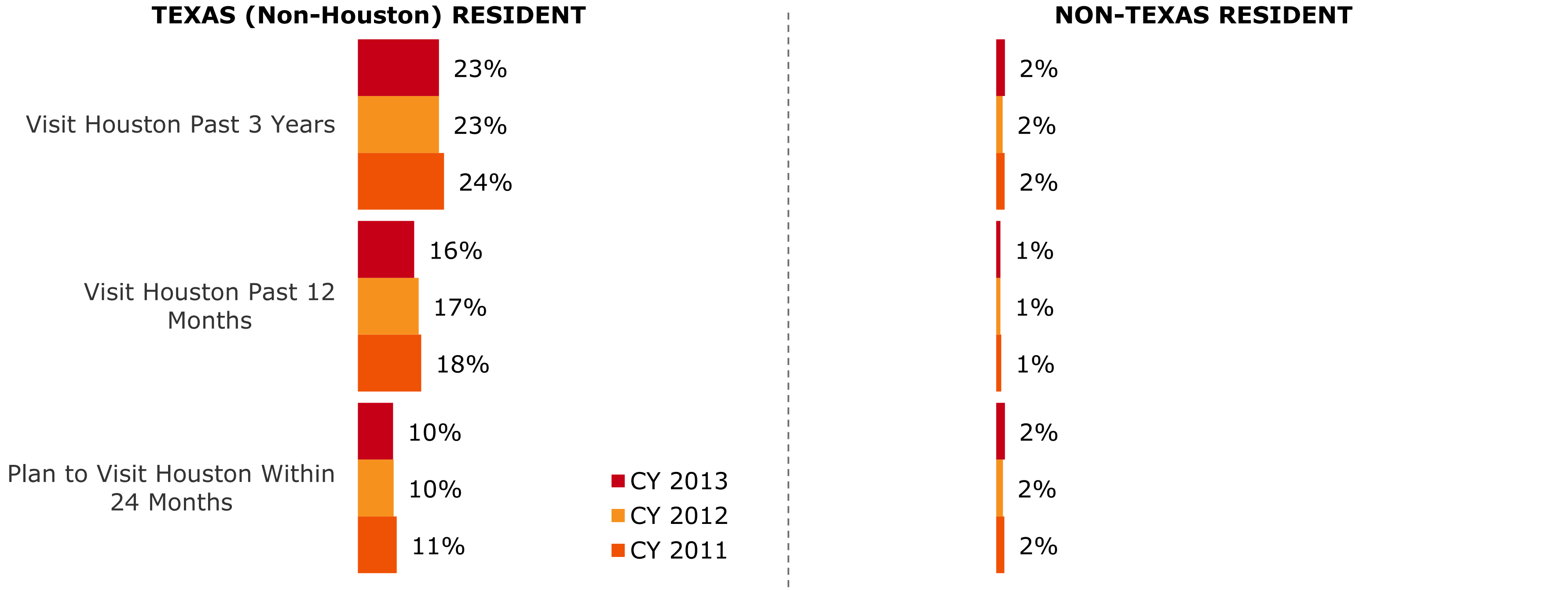


Panel: State/DMA residence of those who visited Houston (Household Level)

Destinations: Houston visitation

Many Texans have and/or plan to visit Houston (nearly a quarter in the past three years), but only a few Non-Texans (2%) have traveled there in the past three years.

Visitation Patterns for Houston – Household Level, All Travelers



Q8a: Please indicate US cities visited for leisure in past three years.
Q8b. Please indicate cities visited within the past 12 months.
Q8c: Which US cities plan to visit within the next two years for leisure? (Household Level)

Visitor demographics

Houston Visitors Resemble Visitors Average US Travelers, With a Few Variations:

- Houston visitors report slightly higher incomes than US travelers overall, lifted by those from Dallas Fort Worth, Austin, San Antonio and those out-of-state.
- Visitors living in Houston note lower income and larger families, indicating that budget-conscious family travelers choose to take advantage of local attractions without the drain of significant transportation expenses.
- Houston claims an above average share of Spanish Origin and African-American visitors.

CY 2013 Demographics	All Travelers	Texas Visitors	Houston Visitors	Houston Visitor & Houston Resident	Houston Visitor & DFW/Austin/San Antonio Resident	Houston Visitor & NY/Chicago/DC Resident*
Average Age	49	47	46	44	45	56
Average Hhld Income	$69,200	$72,600	$73,700	$58,100	$87,600	$115,900
% Male	28%	28%	27%	21%	27%	22%
% Married	55%	60%	58%	43%	66%	55%
Household Composition						
% One Person	25%	21%	18%	19%	19%	0%
% Two People	35	37	42	34	41	74
% Three or More	40	42	40	47	40	26
Ethnicity						
% Caucasian	85%	85%	79%	81%	75%	88%
% Spanish Origin	5	10	9	5	9	0
% African-American	6	6	9	13	8	6

*Very small sample (10); treat as qualitative only

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Visitor demographics

Prior year (2012) data provided for ease of comparison

CY 2012 Demographics	All Travelers	Texas Visitors	Houston Visitors	Houston Visitor & Houston Resident	Houston Visitor & DFW/Austin/San Antonio Resident	Houston Visitor & NY/Chicago/DC Resident*
Average Age	48	47	45	43	44	47
Average Hhld Income	$69,000	$70,400	$79,400	$75,900	$82,800	$122,700
% Male	38%	37%	39%	39%	39%	58%
% Married	55%	56%	53%	40%	70%	61%
Household Composition						
% One Person	25%	22%	20%	27%	16%	23%
% Two People	35	35	33	24	38	22
% Three or More	40	43	47	50	46	55
Ethnicity						
% Caucasian	86%	84%	79%	81%	79%	80%
% Spanish Origin	4	9	10	3	11	7
% African-American	6	7	10	6	10	15

*Very small sample (20); treat as qualitative only
Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Visitor demographics

2011 data provided for ease of comparison

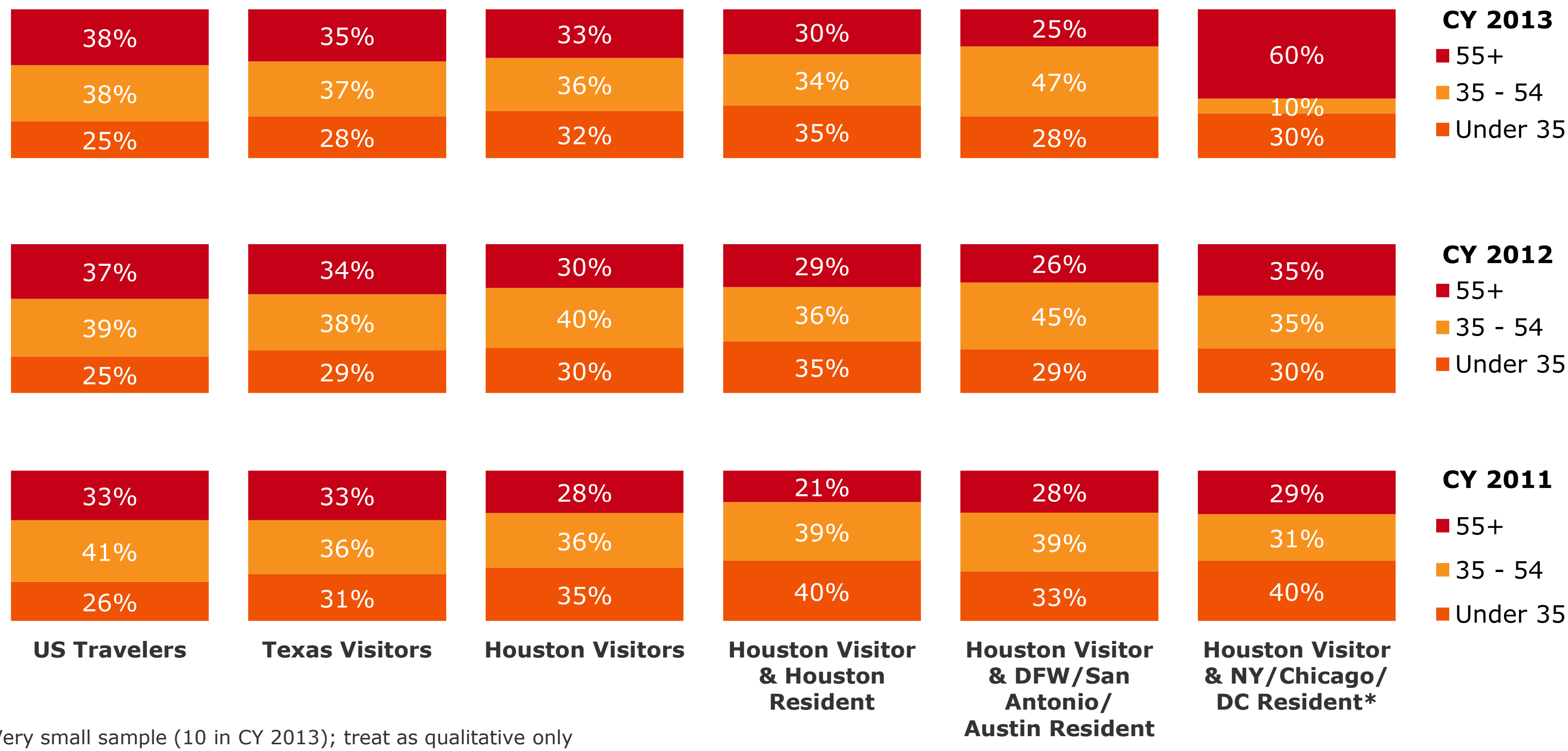
CY 2011 Demographics	All Travelers	Texas Visitors	Houston Visitors	Houston Visitor & Houston Resident	Houston Visitor & DFW/Austin/San Antonio Resident	Houston Visitor & NY/Chicago/DC Resident*
Average Age	47	46	44	41	44	45
Average Hhld Income	$71,700	$70,700	$73,400	$74,600	$74,300	$105,800
% Male	36%	37%	36%	41%	30%	39%
% Married	60%	61%	63%	57%	64%	50%
Household Composition						
% One Person	22%	20%	19%	24%	19%	28%
% Two People	35	37	36	24	32	37
% Three or More	44	43	45	52	49	34
Ethnicity						
% Caucasian	85%	84%	76%	81%	73%	71%
% Spanish Origin	5	10	11	11	15	-
% African-American	7	7	10	8	10	22

*Very small sample (12); treat as qualitative only
Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Visitor age distribution

Houston consistently draws slightly fewer older visitors than other destinations.

Age of Visitor



*Very small sample (10 in CY 2013); treat as qualitative only
QD. How old are you . . . (Respondent Level, demo weighted)

Trip planning: timing

Lodging decisions and work schedules probably contribute to overnight leisure travelers requiring the longest period of time for trip planning and booking. Nearly half (43%) consider a trip to Houston more than three months in advance.

CY 2013 Trip Planning (Time Before Visit)	All US Travelers	Houston Visitors Total	Houston Visitors Leisure Overnight	Houston Visitors Leisure Day Trip	Houston Visitors Business Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
Considered								
Within Two Weeks	33%	28%	18%	69%	23%	49%	24%	38%
2 – 4 Weeks	15	18	17	11	25	15	22	11
1 – 3 Months	18	19	22	7	18	10	24	13
3+ Months	33	35	43	13	36	26	30	38
Decided								
Within Two Weeks	41%	33%	24%	72%	24%	54%	31%	38%
2 – 4 Weeks	16	22	22	12	33	16	25	28
1 – 3 Months	18	20	23	7	19	12	21	15
3+ Months	25	25	31	10	23	17	24	19

*Very small sample; treat as qualitative only
Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

Trip planning: timing

Prior year (2012) data provided for ease of comparison

CY 2012 Trip Planning (Time Before Visit)	All US Travelers	Houston Visitors Total	Houston Visitors Leisure Overnight	Houston Visitors Leisure Day Trip	Houston Visitors Business Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
Considered								
Within Two Weeks	31%	35%	26%	53%	32%	51%	33%	25%
2 – 4 Weeks	15	21	21	17	34	14	31	21
1 – 3 Months	19	17	19	15	17	12	15	11
3+ Months	35	28	34	16	17	24	22	42
Decided								
Within Two Weeks	39%	43%	35%	58%	40%	54%	45%	31%
2 – 4 Weeks	16	22	25	14	33	14	29	22
1 – 3 Months	19	15	16	12	14	12	13	14
3+ Months	26	20	23	16	14	20	14	32

*Very small sample; treat as qualitative only
Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

Trip planning: timing

2011 data provided for ease of comparison

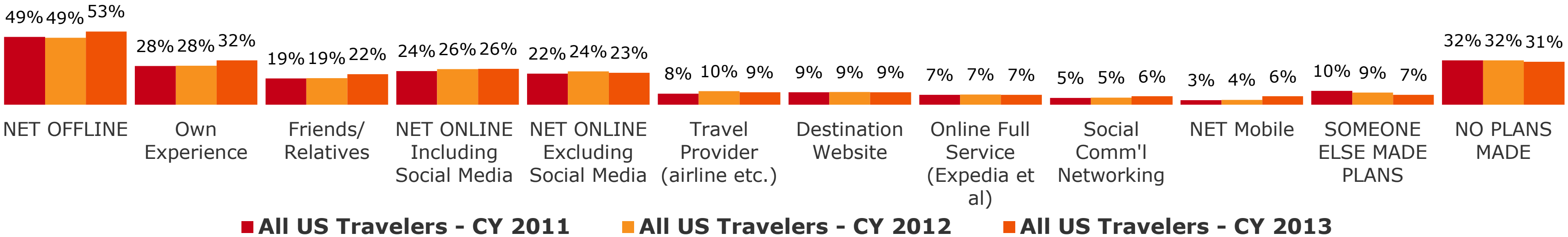
CY 2011 Trip Planning (Time Before Visit)	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago DC Resident*
Considered								
Within Two Weeks	33%	33%	24%	52%	30%	58%	23%	- -
2 – 4 Weeks	14	18	21	10	21	15	28	7
1 – 3 Months	20	19	18	18	29	11	26	20
3+ Months	34	30	38	20	20	16	22	73
Decided								
Within Two Weeks	41%	43%	37%	63%	34%	69%	36%	- -
2 – 4 Weeks	16	17	18	10	20	14	26	10
1 – 3 Months	19	20	20	16	31	6	23	34
3+ Months	25	20	25	11	16	11	16	57

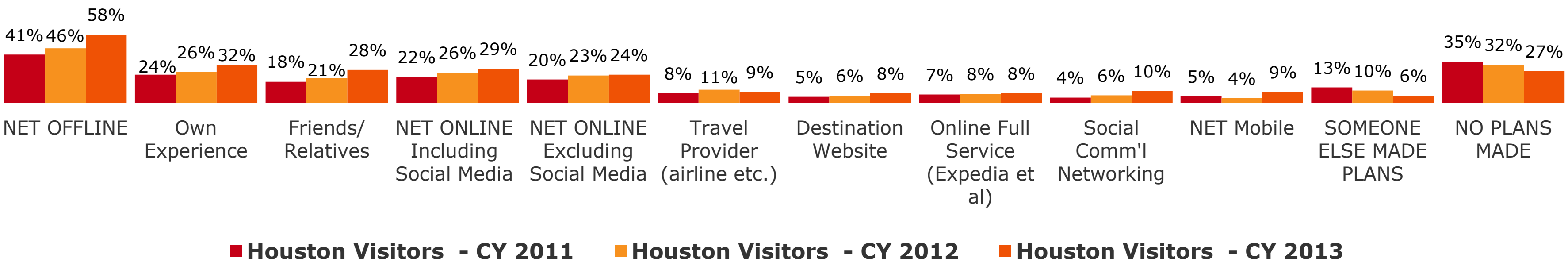
*Very small sample; treat as qualitative only
Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

Trip planning: sources of information

Breaking from previous years and national trends, ***Houston travelers are using social networking more than any other online method*** of information gathering for trip planning.

Information Sources to Plan a Trip
Ranked by All Sources (6%+)



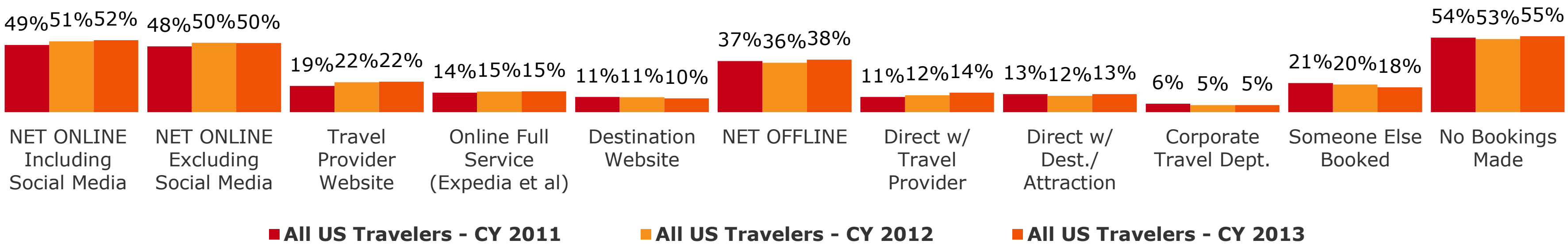


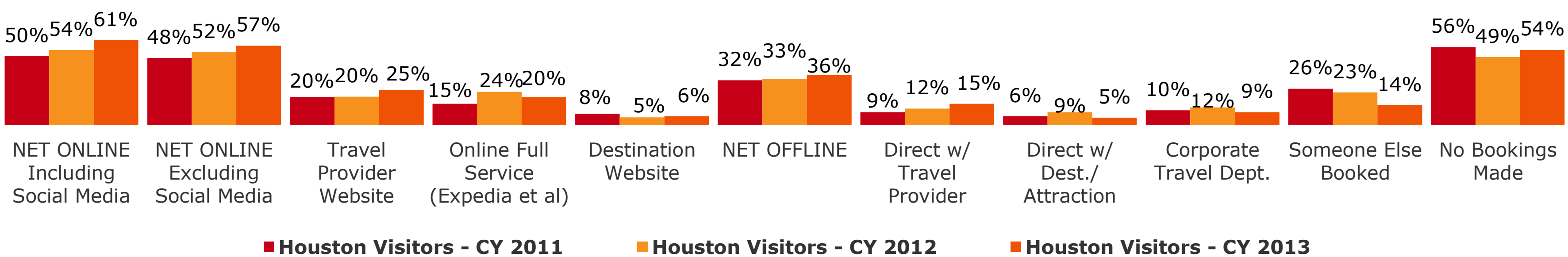
Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

Trip booking

The majority of ***Houston travelers (61%) take advantage of the ease and convenience of online travel booking*** compared to half (52%) of US travelers in general.

Method Used to Book Trip Components
Ranked by All Sources (5%+)





Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

Trip characteristics: purpose & transportation

Although most visitors come to ***Houston to play***, Houston attracts 6% fewer leisure visitors than national average (and more business visitors) than average (66% vs. 74% all US travelers), similar to last year.

CY 2013	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
PRIMARY TRIP PURPOSE								
NET Leisure/Personal	74%	66%	100%	100%	-	68%	71%	58%
Visit Friends/Relatives	40	47	75	51	-	37	56	41
Entertainment/ Sightsee	11	7	10	13	-	11	8	6
Outdoor Recreation	6	3	4	8	-	6	-	-
NET Business	13	16	-	-	100	10	13	39
Personal Bs/Other	14	18	-	-	-	23	16	3
PRIMARY MODE								
% Own Auto/Truck	75%	73%	73%	91%	45%	88%	93%	18%
% Air Travel	14	19	20	-	43	4	2	65
% Rental Car	4	4	5	1	7	-	4	11
% Other	3	1	0	5	1	1	1	3

*Very small sample; treat as qualitative only
Q1b: Which was the primary purpose of trip?
Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)

Trip characteristics: purpose & transportation

Prior year (2012) data provided for ease of comparison

CY 2012	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
PRIMARY TRIP PURPOSE								
NET Leisure/Personal	80%	69%	100%	100%	-	71%	68%	52%
Visit Friends/Relatives	42	47	74	40	-	35	52	46
Entertainment/ Sightsee	13	7	10	16	-	11	5	3
Outdoor Recreation	7	4	5	12	-	7	3	-
NET Business	11	17	-	-	100	2	23	43
Personal Bs/Other	9	14	-	-	-	27	9	5
PRIMARY MODE								
% Own Auto/Truck	73%	66%	68%	92%	38%	80%	78%	11%
% Air Travel	16	21	20	0	46	1	8	76
% Rental Car	4	6	6	2	12	2	10	7
% Other	3	2	1	1	2	5	1	-

*Very small sample; treat as qualitative only

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)

Trip characteristics: purpose & transportation

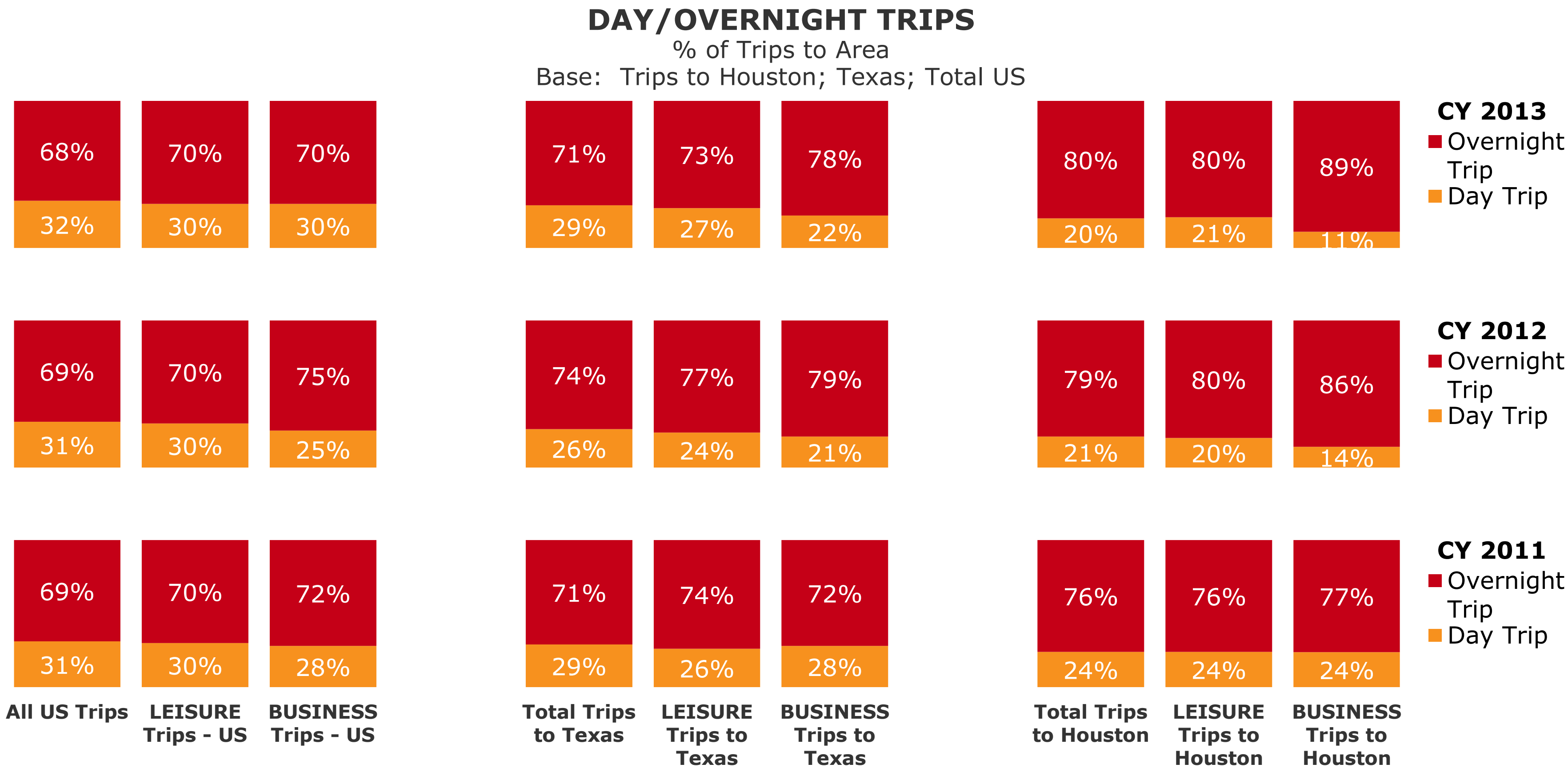
2011 data provided for ease of comparison

CY 2011	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
PRIMARY TRIP PURPOSE								
NET Leisure/Personal	79%	68%	100%	100%	- -	70%	75%	47%
Visit Friends/Relatives	42	49	76	58	- -	49	58	31
Entertainment/ Sightsee	13	8	10	14	- -	5	6	15
Outdoor Recreation	7	2	3	6	- -	4	4	- -
NET Business	12	23	- -	- -	100	19	20	37
Personal Bs/Other	9	9	- -	- -	- -	12	5	16
PRIMARY MODE								
% Own Auto/Truck	74%	71%	75%	92%	41%	92%	83%	17%
% Air Travel	15	18	15	1	43	3	5	72
% Rental Car	4	4	4	3	7	0	6	8
% Other	3	3	1	2	8	2	5	-

*Very small sample; treat as qualitative only
Q1b: Which was the primary purpose of trip?
Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)

Trip characteristics: day/overnight

While the proportion of overnight trips to Texas saw a slight dip in 2013, th***e proportion of overnight trips to Houston stays consistently higher and well above the national average***.



Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)

Trip characteristics: lodging and length of stay

Houston visitors average more nights in Houston than last year (4.2 vs. 3.5) with the largest increase coming from nights stayed in a private home.

Houston visitors also average almost a full night longer in Houston than the overall national overnight trip average (4.2 vs. 3.4).

LODGING	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
CY 2013								
AVG # NIGHTS (if any)	3.4	4.2	4.2	--	3.7	4	2.6	4.1
Private Home	1.7	2.5	3	--	.8	2.5	1.6	2.1
Hotel/Motel	1.2	1.4	.9	--	2.4	.9	.9	2
All Other	.3	.2	.2	--	0.0	.4	.1	-
CY 2012								
AVG # NIGHTS (if any)	3.4	3.5	3.5	--	2.9	3.4	2.7	3.8
Private Home	1.5	1.9	2.3	--	0.8	2.3	1.6	1.8
Hotel/Motel	1.3	1.2	0.9	--	1.9	0.3	0.9	2.1
All Other	0.6	0.4	0.3	--	0.2	0.8	0.2	0.0
CY 2011								
AVG # NIGHTS (if any)	3.3	3.8	3.5	--	4.0	2.7	2.6	4.1
Private Home	1.5	2.0	2.4	--	0.6	2.0	1.7	1.8
Hotel/Motel	1.2	1.3	0.8	--	2.9	0.6	0.7	1.4
All Other	0.6	0.5	0.3	--	0.5	0.1	0.2	0.9

* Very small sample; treat as qualitative only

Q4f: Please specify the number of nights stayed at each listed accommodation. (State Level – demo wtd)

Trip characteristics: travel party

Leisure day trippers more likely travel in pairs (57%).

Meanwhile, leisure overnight visitors more likely travel with children (30%) than comparison groups.

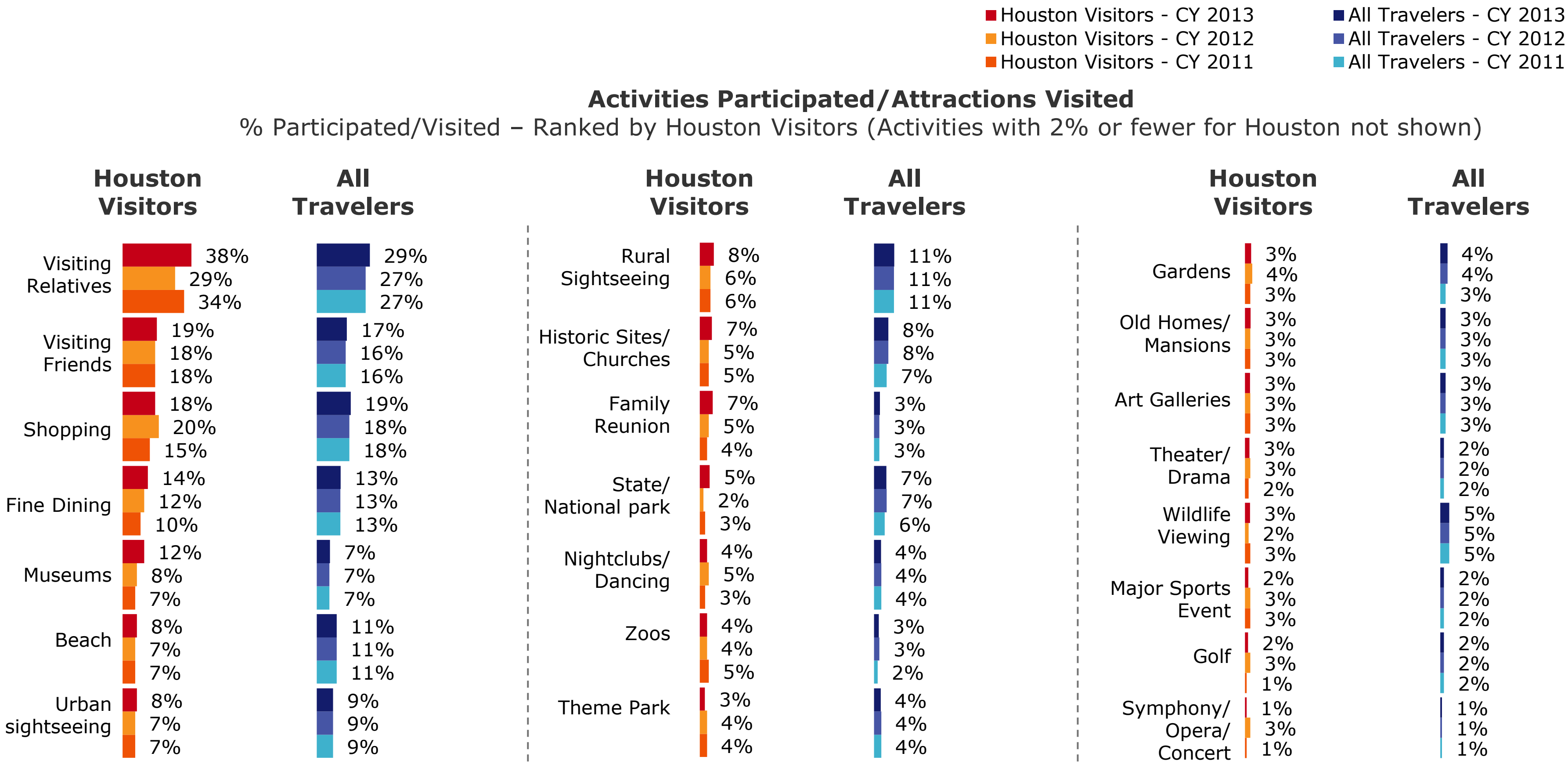
Trip Characteristics (Trip Level)	All US Travelers	Houston Visitors Total	Houston Ls Visitors	Houston Ls Visitors – Overnight	Houston Ls Visitors – Day Trip	Houston Bz Visitors – Total
CY 2013						
AVERAGE # IN TRAVEL PARTY (Q3a)	2.7	2.2	2.3	2.3	2.2	1.7
% Travel in Pairs	39%	38%	43%	40%	57%	14%
% Traveling with Children	24	23	28	30	17	5
Avg. # of Children on Trip (if any)	2.0	1.6	1.7	1.7	1.5	1.5
Average # in Travel Party in Household	1.9	1.9	2.0	2.0	1.9	1.4
CY 2012						
AVERAGE # IN TRAVEL PARTY (Q3a)	2.6	2.2	2.5	2.4	3.0	1.4
% Travel in Pairs	40%	38%	40%	38%	48%	22%
% Traveling with Children	23%	23%	31%	30%	37%	3%
Avg. # of Children on Trip (if any)	2.0	1.7	1.7	1.8	1.4	1.7
Average # in Travel Party in Household	2.0	2.0	2.2	2.2	2.4	1.3
CY 2011						
AVERAGE # IN TRAVEL PARTY (Q3a)	2.7	2.5	2.7	2.6	2.9	2.3
% Travel in Pairs	39%	36%	40%	40%	38%	21%
% Traveling with Children	26	25	33	33	36	3
Avg. # of Children on Trip (if any)	2.1	2.0	1.9	1.9	1.9	4.2
Average # in Travel Party in Household	2.0	2.0	2.2	2.2	2.3	1.2

Q3a/b: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)

Trip characteristics: vacation activities/attractions

Over half ***(57%) of Houston visitors are in town to see relatives or friends***, over ten percent higher than the national average (46%).

Urban activities (shopping, fine dining, and museums) complete the top five Houston attractions.



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Trip characteristics: vacation activities/attractions

Visitors From:

- Dallas: most likely to be on a social visit
- San Antonio/Austin: visiting family
- Other Texans: come to the city for shopping and dining
- Non-Texans: more interested in rural and urban sightseeing than in-state visitors

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Houston Visitors (Activities with 4%+ shown)

Green = above average / Orange = below average

Houston Visitors CY 2013	All Houston Visitors	Visitors From DFW	Visitors From Houston	Visitors From San Antonio/Austin	Visitors From Other Texas	Visitors from Outside Texas
Base:	756	99	155	118	98	286
Visiting relatives	38%	43%	32%	47%	32%	39%
Visiting friends	19	25	18	12	17	22
Shopping	18	22	17	4	22	22
Fine dining	14	24	5	6	19	18
Museums	12	16	5	11	12	14
Beach	8	7	10	2	8	10
Rural sightseeing	8	5	7	5	6	11
Urban sightseeing	8	5	4	2	9	13
Family reunion	7	12	10	3	3	7
Historic Sites/ Churches	7	5	4	5	10	8
State/ National Park	5	2	6	6	2	7
Nightclubs/ Dancing	4	6	4	2	3	4
Zoos	4	3	6	2	5	4

Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

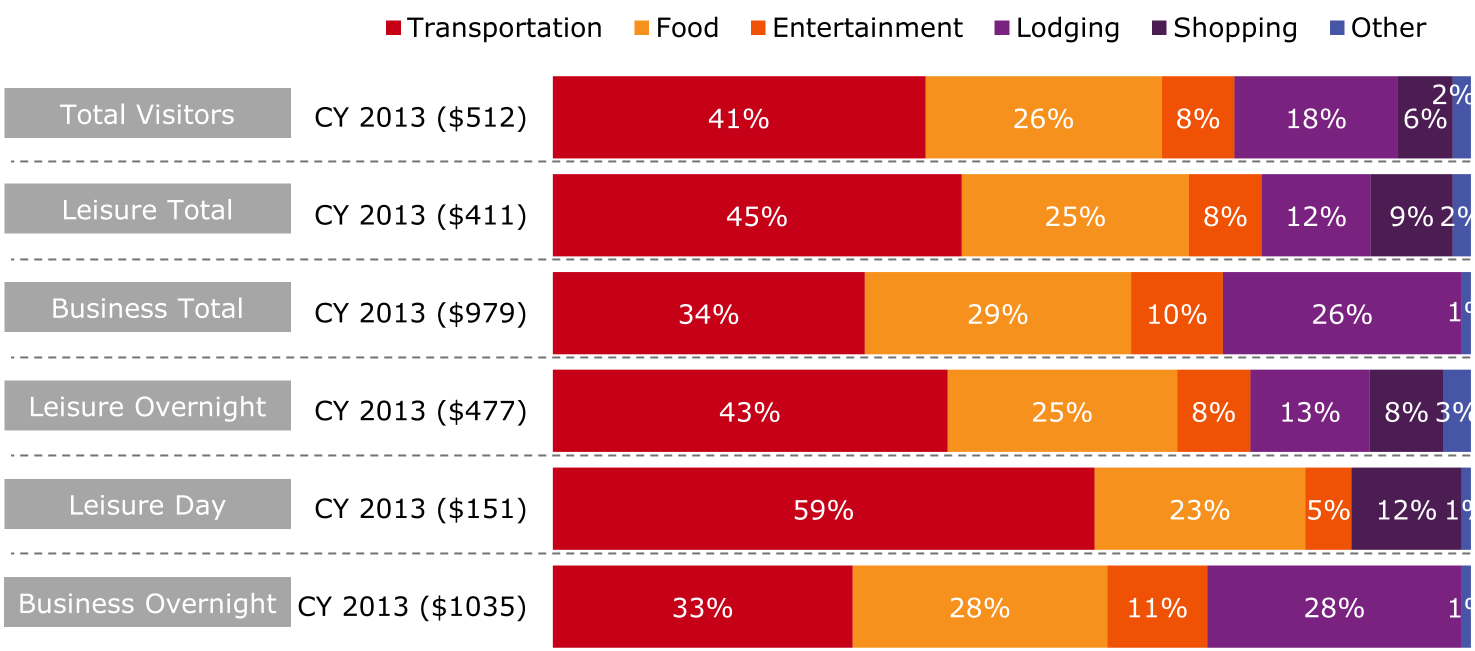
Trip characteristics: expenditures by type of travel

Value of Visitors by Type of Trip:

- No change occurs in overall spending from last year ($512 vs. $514); Significant gains in Business ($979 vs. $644) offset slight declines in Leisure spend ($411 vs. $445)
- With larger than average lodging budgets and most nights spent in hotels, overnight Business travelers continue to have the highest travel party spend of all segments.

Average Spending in Houston by Trip Type

Total Spending by Travel Party (Total Spending, including 0)



Spending	
CY 2011	CY 2012
$498	$514
$428	$445
$756	$644
$498	$517
$205	$152
$933	$740

Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Entertainment includes gaming. Other includes amenities/other.
Q4g. Please indicate the total dollar amount spent by your travel party (all) in Texas (Houston) for . . . (State Level-demo wtd)

Destinations: competitive states

Houston visitors who live in Texas usually choose to go South or West for additional vacation travel; conversely, Houston visitors from NY/Chicago/DC tend to travel South or East. Both groups select California and Florida as top choices.

Other States Visited/Planned by Houston Visitors (Key Competitors)
% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years

Top States: DFW/Austin/San Antonio Residents
Base: Visited Houston

Top States: NY/Chicago/DC Residents*
Base: Visited Houston

*Caution: Very small base

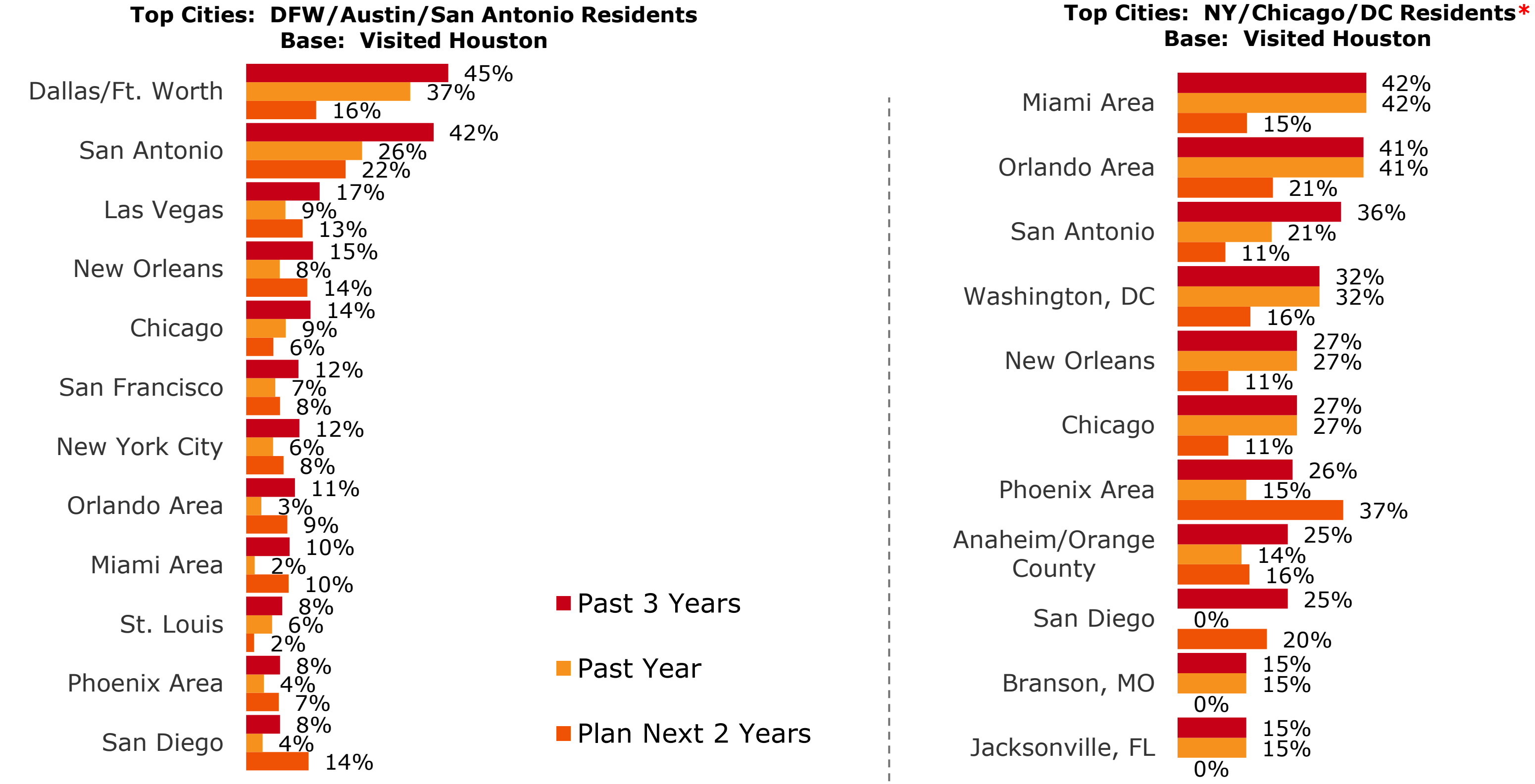
Q7a: Please indicate US states visited for leisure in past three years. ;Q7b. Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure?   (Household Level)

Destinations: competitive cities

Houston visitors from within Texas often visit other Texas destinations (San Antonio and Dallas/Ft. Worth) while visitors from the larger non-Texas cities travel southward (Miami and Orlando).

Other Areas Visited/Planned by Houston Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years



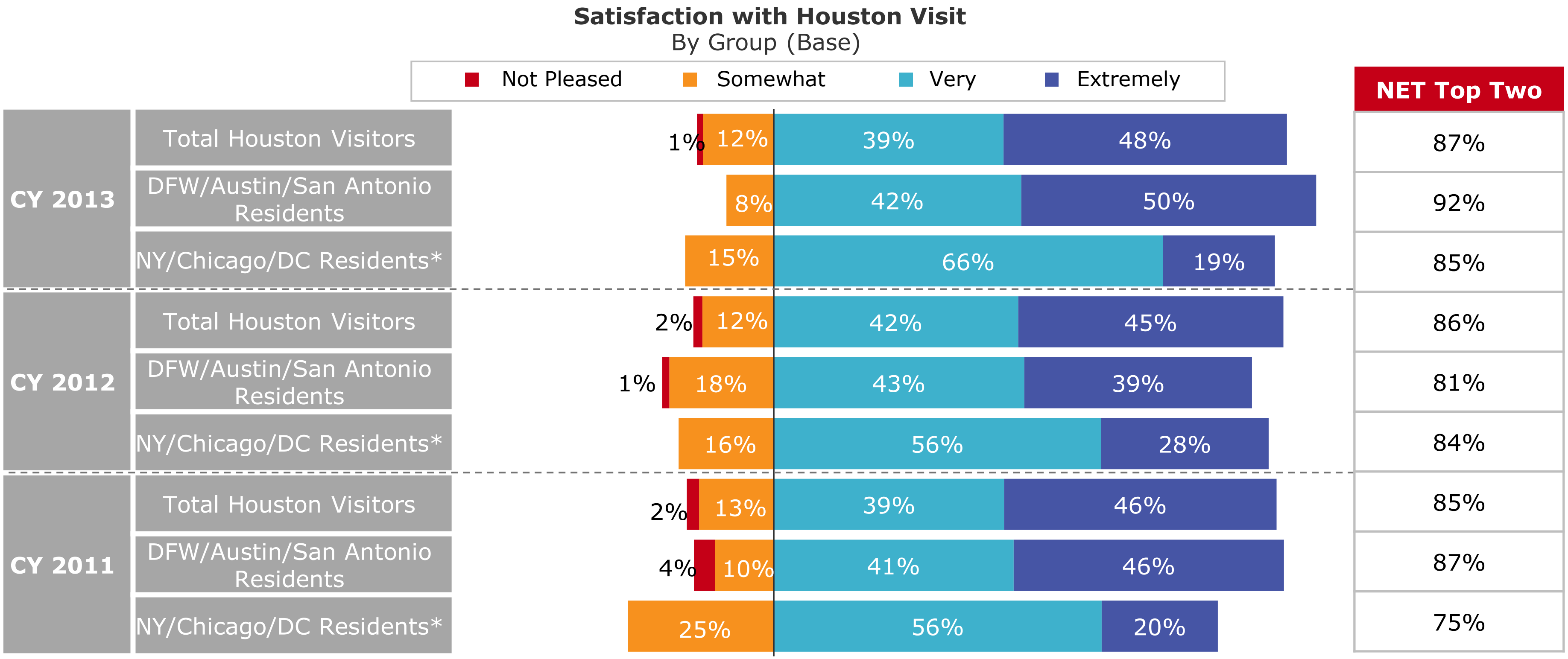
*Caution: Very small base

Q8a: Please indicate US cities visited for leisure in past three years. ;Q8b. Please indicate cities visited within the past 12 months (too few to show on NY/Chicago/DC chart); Q8c: Which US cities plan to visit within the next two years for leisure? (Household Level)

Satisfaction: Houston by residence

Houston continues to consistently satisfy more than four out of five visitors year after year.

DFW/Austin/San Antonio residents are the most satisfied and also have the greatest gains in satisfaction when compared to the previous year. Very few visitors (1%) express displeasure with Houston.



Very small sample; treat as qualitative only; Note: Not pleased includes Not At All and Not Very Pleased
Q4l: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Houston. (State Level-demo wtd.)

Research methods - TravelsAmerica

The syndicated TravelsAmerica study collects data via a web based methodology. Sample is selected from the TNS USA Panel with e-mail invitations sent monthly to representative households. TNS targets a response rate of 45%. The field period runs for two weeks each month, usually starting in the middle of the first week.

To enhance relevance, the data are weighted two ways:

- **Demographic weights** adjust respondents by demographic factors such as region, age, income, household size, and marital status to closely represent the characteristics of US households
- **Trip and state projection calculations** collects detailed information for up to three trips in the past month to project the actual number of trips taken. In the case of city level calculations, each trip taken to that city counts. A few tables represent person-trips – these take into account the immediate travel party size for each trip as well. For projections, the counts are weighted to reflect the actual number of US households and total trips.

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for Greater Houston. For the calendar years 2011 through 2013, respondents (does not include others in travel party) for Houston and total are shown below.

CY 2013 #of Travelers (Unweighted)	CY 2013 # of Travelers (Weighted)	CY 2012 #of Travelers (Unweighted)	CY 2012 # of Travelers (Weighted)	CY 2011 #of Travelers (Unweighted)	CY 2011 # of Travelers (Weighted)	Region
626	743	682	796	654	822	Houston Visitors
67,212	68,026	72,693	70,811	64,155	75,168	Total for Travels America

Glossary

Term	Definition
DMA	**Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)**
Calendar Year (CY)	**January 1 through December 31**
In-State	**Texas**
Person-Trip	**Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)**
Respondent/Household Level	**Respondent information – one count per respondent**
Source of Visitors	**Residence of visitors**
State/Region Level	**Information about all trips taken to a particular state/region (each trip to an area counts)**
State Volume	**All trips taken to/within the state**
Travel Party	**Traveler plus all companions, including children**
Trip	**Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator).** This eliminates some leisure day trips, such as some visitors from Galveston**, since the distance is about 50 miles**
Trip Level	**Information about all trips – each trip counts**
Trip Volume	**All trips summed together**
Visitor	**Person who has visited Houston in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer).**

Thank you