Houston Visitor Profile
Calendar Year 2012

August 2013

TNS 212 233205

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Your business issues

Tourism supported 117,000 jobs in Houston in 2011 and generated $15.5 billion for the local economy (up 11% from 2010)*.

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 television commercials, has embarked on a "Houston is" ad campaign that promotes the city as a culinary and cultural capital.

Gaining increasing attention as a travel destination, US News and World Report named it the 7th-best shopping city in the world and the NY Times listed it among the 46 places to visit in 2013. In addition, arts events regularly earn national attention. Specific goals include:

- Encouraging more people to 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://blog.chron.com/29-95/2013/05/arts-tourism-generating-big-bucks-for-houston-economy/

Growth summary

Growth insights

- Metro areas in Texas represent critical markets for Houston, with 62% of its visitors living in Texas (TNS' TravelsAmerica) – including above-average shares of African-Americans and Spanish origins.
- Over time, the GHCVB ads increasingly appeal (likeability) to potential visitors –– and are strong enough make people consider Houston: "I love the commercials; Houston will be on my list of upcoming travels."
- Two-thirds of travelers recognize Houston's *Arts/ Culture* and *Leisure/Entertainment* over other cities, aided by the "Houston is" print campaign and by artists and other supportive groups who adopt campaign imagery for Facebook, Twitter, Google+, Instagram, and Pinterest accounts.
- 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.
- Travelers both research and purchase travel digitally, more than any other type of purchase (clothing, cars, cosmetics, etc.), so using the Internet to provide travel information meshes well current preferred behaviors.

Precise plans for growth

- Maintain focus on all ethnicities in 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.
- Continue to use the current commercials, which are strong enough to influence people, and continue to incorporate social media to build synergy within a campaign.
- Consider some family-oriented advertising (outstanding zoo and the space center), in addition to the *arts/cultural* and *dining* focus which currently most strongly appeals to adults
- Look for new ways to get Houston lovers to act as advocates – such as testimonials, blogs, or Facebook incentives.
- Keep the website up-to-date and continue to build social media ties with the community to mesh with the Digital preferences of Houston visitors.

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The Houston Visitor and Brief Abstract

TNS

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	Age 54	Age 47	Age 48
High Income ($77,900)	High Income ($78,100)	High Income ($75,400)	Average Income for travelers ($69,000)
Married (67%)	Married (66%)	Married (69%)	Married (55%)
College Grad (49%)	College Grad (53%)	College Grad (43%)	College Grad (45%)
Caucasian (78%)	Caucasian (76%)	Caucasian (73%)	Caucasian (82%)
Will pay more to visit original places	Love to shop markets/ specialty stores	Like to shop before purchasing	Choose sightseeing more often than Houston visitors, especially rural sightseeing
Buy on quality, not on price	Will pay more to visit original places	Worth it to pay more for quality goods	More likely to go to the beach than Houston visitors
	Quality worth extra $$$; buy for quality, not price	Label reader; read the small print	Travel with children at about the same rate as Houston visitors (23%)
	Like to travel to exotic places	Uncomfortable without confirmed reservations	
	Shoppers, but not bargain hunters	Frequently search for information on travel destinations	
	Family/friends ask for travel advice	Unlikely to buy clothes for comfort rather than style	
	More likely to drive an SUV than average	More likely drive an SUV than average	
	Slightly more likely to read (newspapers/ magazines)	Watch TV comedies/dramas	
	Above-average use of social media (44% daily)	Half use social media daily	

Brief abstract

Positive Trends and Results

- Houston's visitation in 2012 dips below 2011, but remains 5% above 2010, a better performance than either Texas or the US
- Four out of five (81%) leisure visitors spend the night, similar to last year – the group that advertising can most encourage to stay longer and visit more attractions (and spend more $$$)
- The proportion of lucrative business trips slips from last year, but remains near 2010 (17%) and above the US average
- Spending continues to climb despite slightly fewer nights stayed
- Satisfaction of Houston visitors slightly, but steadily, improves
- Houston outscores its competitors (Austin, San Antonio, DFW, and New Orleans) on two popular urban activities (*dining* and *cultural/ performing arts*) and also leads on *handicap access*
- Further, Houston shines over "other US cities" on *arts/culture, leisure/entertainment,* and *employment opportunities*
- Houston continues to receive high scores on all five key leisure destination measures, and maintains last year's notable gain on "overall opinion" of the city
- Overall awareness of the ad campaign continues to climb (40% from 36% in 2012, 29% in 2011, and 23% in 2010)
- Although not many (5%) recall the new print "Houston is" campaign, it gets high marks for likeability and believability
- The Target group of visitors (35-55 females) consistently assign equal-to-stronger ratings to features of the ads

"I love the diversity of Houston"

Opportunities

- Continue to nurture Texans as potential visitors – Houston tourism depends on them with nearly two-thirds (62%) of Houston visitors living in Texas
- Nearly matching the last two years, most Texas travelers still go somewhere else on their vacations (23% visited Houston)
- With far more visitors preferring Houston because of '"family/roots there" than any of its competitors (Austin, San Antonio, DFW, and New Orleans), Houston should continue to punctuate advertising messaging with the strengths of the city – which it does – in order to broaden interest.

"I recall these commercials and love them. Houston will be on my list of upcoming travelers."

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Executive Summary/Implications

Executive summary/implications

Importance of Tourism to Houston

- **Volume of Visitors**: Although Houston's visitation in 2012 slips below 2011, it remains 5% higher than in 2010, a stronger growth rate than either Texas or the US overall.
- **Travel Spending in Houston**. Visitors spend substantial amounts in Houston, averaging $514 per travel party (up from $498 last year):
  - Business travelers ($644) spend more than leisure travelers ($445)
  - Overnight leisure visitor spending ($517) more than triples that of leisure day-trippers ($152)
  - With longer stays (lodging) and higher transportation costs, overnight non-Texas residents' spending ($952) far exceeds Houston residents ($426) and non-Houston Texas residents ($471).
- **Source of Visitors**. Texas supplies the majority (62%) of Houston visitors; Louisiana follows distantly (9%).
- **Trip Purpose**. Most visitors to Houston are tourists (not business travelers); however, Houston attracts more of the lucrative (more hotels/motels) business travel than the national average (17% vs. 11%).
- **Leisure Overnighters**. Leisure travelers make up over two-thirds of all Houston travel (69%), most of whom spend the night (83%) and represents the group that advertising can most encourage to stay longer and visit more attractions (and spend more $$$).
- **Timing**. The heaviest travel to Houston peaks in June – similar to prior years.

Executive summary/implications

Profile: Trip and Travel Characteristics

- **Demographics**: Houston visitors resemble visitors elsewhere, with some variations:
  - Visitors from New York City/Chicago/Washington DC ($122,700) report higher earnings than others ($79,400 total Houston visitors), a gap a bit wider than last year
  - Ethnic comparisons with total US travelers show a larger proportion of African American visitors (10% vs. 6%) and Spanish origin (10% vs. 4%).
- **Typical Travel Planning Horizons**. Similar to overall US travelers, many (43%) Houston visitors decide to take the trip within two weeks of departure. As expected, leisure overnighters (35%) less frequently plan to visit on short notice (within two weeks) than leisure day-trippers (58%) or than Houston residents (54%).
- **Travelers Primarily Rely on "Offline" Information Sources**. Houston visitors rely primarily on their own experience (26%) and friends/relatives (16%) to gather travel information, similar to other travelers.
- **Houston Visitors Most Often Book "Online."** Mirroring their US counterparts, about half of Houston visitors book at least some component of their trip online (54%).
- **Most Visitors Drive**. While most drive (66%), a slightly higher-than-average share (21%) fly to Houston – aided by a somewhat larger share of business travelers.
- **Overnighters Spend More than Day-trippers**. Because of extra time to see/do more things and because they incur lodging expenses, leisure overnight visitors spend more than triple the amount of day-trippers ($517 vs. $152). Business overnighters spend the most ($740), but don't stay quite as long as leisure overnighters (2.9 vs. 3.5 nights). Overall, Houston visitors spend more money despite a slightly shorter stay in the past year.

Executive summary/implications

Profile: Popular Activities/Attractions by Residence

Ranked by Houston Visitors (Activities with 3%+ shown): Green = above average / Orange = below average

- **Visitors, depending on where they live, come to Houston for different reasons; those from competitive Texas cities downplay Houston's strengths:**

Houston Visitors CY 2012: ACTIVITIES	All Houston Visitors	Visitors From DFW	Visitors From San Antonio/Austin	Visitors From Other Texas	Visitors from Outside Texas
Base:	682	75	108	106	257
Visiting Relatives	29%	27%	34%	31%	34%
Shopping	20	13	10	25	23
Visiting Friends	18	17	15	21	20
Fine Dining	12	3	15	6	16
Museums	8	10	5	14	10
Beach	7	7	0	5	10
Urban Sightseeing	7	8	1	9	9
Rural Sightseeing	6	3	0	11	7
Family Reunion	5	6	2	7	7
Historic Sites/ Churches	5	3	1	1	9
Nightclubs/ Dancing	5	4	0	9	6
Theme Park	4	1	3	6	6
Art Galleries	3	2	0	12	3
Old Homes/Mansions	3	0	0	11	3
Golf	3	0	4	3	5
Major Sports Event	3	0	4	6	2

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Executive summary/implications

Competitive Standing

- **Houston Relies on Texas Tourism**. Since most Houston visitors live in Texas, proximity is critical for Houston tourism. Nine of the top 12 city sources of visitors are in Texas (led by Houston, Dallas-Ft. Worth, and Austin).
- **Geography influences competitive market set**. Dallas-Ft. Worth, Austin, and San Antonio residents prefer southern or western states for additional vacation travel while New York, Chicago, and Washington DC residents seek destinations clustered in the South and Northeast. Despite this polarization, both groups select Florida and California as places they have visited and/or want to visit in the future.
- **San Antonio Generally Leads Competitors in Image and Attribute Rankings**
  - **Preference for Houston depends on visitation**. Past year overnight leisure Houston visitors and Houston residents prefer Houston on most destination attributes. However, travelers as a whole more often choose San Antonio when comparing Texas metropolitan areas. San Antonio excels (over Houston and other competitors) on attributes ranked as most important in a travel destination including *good value* and *reasonable costs, friendly/welcoming, explore/sightsee, good service*, and *lots to see/do*. Travelers view Houston as stronger competitor for urban activities, notably *variety of dining options* and *cultural/ performing arts*. Houston also gets high marks for *handicap accessibility* and many *have family/roots there*.
  - **Opinion ratings of Houston remain positive, but trail other Texas cities**. The majority of visitors perceive Houston positively in most ratings, with consistently equal-to-higher ratings than last year: *overall opinion* (56% from 56%), *value for the money* (61%; 63%), *experience in Houston* (72%; 72%), *likely to return* (69%; 71%), and a *place to recommend* (68%; 65%). However, San Antonio and Austin lead on all of these measures.

Executive summary/implications

Advertising Awareness

- **Advertising awareness directly relates to distance from Houston and past visitation:**
  - **In Texas, Houston's unaided ad awareness trails San Antonio**. San Antonio leads in overall unaided ad awareness (26%), above all other Texas cities in the study (Houston 17%, DFW at 11%, and Austin 10%). Past year visitors (22%) and Houston residents (20%) most often remember a Houston ad.
  - **Among the GHCVB ads, overall awareness increases from last year**. Building on similar campaigns from prior years, ad recognition climbs from last year with TV gaining substantially (38% from 31%). Although the new print campaign generates only minimal recognition (5%), combined awareness continues to grow with 40% remembering at least one ad (from 36% in 2012 and 29%, 23%, and 19% in preceding years).
  - **Print ads ratings climb**. While strong, the new "Houston is" campaign has not yet reached the levels of the prior "My Houston" campaign. *Likeability* and *believability* garner the highest ratings.
  - **"Houston is" builds interest**. Members of all groups associate the ad with *cultural events and sites* (about 60%) and *dining* (about half).
  - **The three TV commercials generate very positive reactions**. Although the Jim Parsons commercial leads the other two ads, the differences are small and the perceptions are strong, especially for *likeability* of the ads – which supports the steady increase in awareness noted above.
  - **Advertising effectiveness for Houston**. Advertising draws about one visitor out seven (14%, up from 11% last year) to Houston – not counting the effect from any online advertising.

Executive summary/implications

Target Market (Core Visitor: Females 35-55)

- **GHCVB's attention to the core visitor succeeds**:
  - **The core visitor/target market reacts to the ads**. Their recognition of the ads (42%) is just slightly above that of all Houston visitors (40%), but they are more likely to visit because of the positive impact of the ads (21% vs. 14%).
  - **They consistently view GHCVB ads quite positively**. Generally similar to non-core travelers in rating the ads on *impression, likeability, future visitation*, and *believability*, they are more likely to associate the ads with being for *people like me, cultural events/sites, dining*, and *uniqueness*.
  - **Further, the impact of the ads on them, regarding Houston, improves more than others**. Positive reactions to the ads (seeking more information, deciding to visit, lengthening stay/adding attractions) jumps by 50% between the core visitor and non-core visitor (35% positive reaction vs. 23%).
  - **TV builds the strongest effect**. The core visitor's awareness of GHCVB's print and TV ads roughly mirror the non-core visitor, but with much higher impact from TV than print.
  - **Almost everyone (core and non-core visitor) watches TV and goes online daily**. The key differences are that more non-core visitors read (newspapers) while more core visitors connect to social media. Everyone connects to the Internet – now even more than television.
  - **Comedies and dramas top the list among core visitors**. Core visitors tend to watch comedies and dramas (roughly 60%) while non-core visitors more often watch evening or prime time news (over 60%), but they, too, watch dramas (59%).

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Executive summary/implications

The Website, Media Choices, and Satisfaction

- **Greater Houston CVB Website – Value Still Key**
  - **Destination website users look for deals**. Travelers choose *savings/value* as the top desired feature in a travel destination website while "save money" ranks 16th out of 22 evaluations about the GHCVB website by users. Although it moves up a couple of notches (from 18th last year and 20th before that), Houston still has an opportunity to improve already high satisfaction by making *savings/value* a stronger element.
- **Online connections compete with TV**. Slightly more people now connect to the Internet daily (80%) as watch TV (77%), underscoring a shift toward continuous connectivity; radio ranks third (64%). Daily contact via social media (41%) now almost matches weekly magazine readership, led (51%) by the target market/core group (female visitors 35-55).
- **Media: When**. "Prime time" is still prime time –viewing peaks, by a wide margin, between 6 and 10 pm – whether broadcast or cable TV, and although not nearly as ubiquitous, YouTube and Internet broadcasts.
- **Media: What**. News and dramas lead other viewing choices – except for the core market, which prefers comedies to the evening news. Comedies rank much lower (ties for fifth) among the non-core market.
- **Houston Generates Good and Improving Levels of Satisfaction**
  - **Partially recovering from last year's dip, 60% (overall) claim satisfaction with their Houston visit**. By group, Houston residents' satisfaction rebounds from last year (76% from 67%), and increases its margin over other Texans (56%), which posts a more modest gain. Satisfied visitors help build strong word-of-mouth "advertising" that every destination needs to supplement their advertising campaigns.

Executive summary/implications

Assessment

- **Houston Draws The Business Traveler**. But, it draws fewer than last year. As companies continue to find alternatives to face-to-face meetings, company travel budgets will continue to decrease. Houston can counter this trend by remaining attractive to business travelers, but also by spurring greater interest as a leisure destination. Key images to underscore in promoting Houston include its *value* (a key concern among travelers) and *urban appeal*. As noted by comments from respondents – the ads make some of them want to give Houston a try.
- **Houston Leisure Travel Potentially More Lucrative**. With more than half (59%) of Houston overnighters currently opting to stay in a hotel, Houston already succeeds in encouraging guests to use paid accommodations. However, finding ways to encourage these travelers to stay more days in the city could add to tourism spending – especially if hotels can capture more of those visiting friends and family.
- **Tough Economy Impacts Tourism**. Houston posts a more robust recovery over the past two years than either the US or the state of Texas. Emphasis on Houston as a *culturally diverse, family-friendly, cosmopolitan city near the gulf* can attract more overnight leisure visitors and Houston's strong, continuously improving advertising helps the city become more competitive.
- **Messaging**. Promoting hotels' *affordability, relaxation value, avoidance of being an intrusive houseguest*, and easy access to Houston's *cosmopolitan dining/entertainment* and *arts/cultural events and sites* could entice travelers to choose paid accommodations.
- **Media**. Most people view television (77%) and Internet sites (80%) daily, with vast messaging potential. Both of these can target the core market (females 35-55); plus, the core market also has an affinity for social media that will likely continue to expand.

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Appendix I. Profile From TravelsAmerica Syndicated Survey

Volume of visitors (person-trips)

2012 visitor volume slips slightly in the US, Texas, and somewhat more in Houston from last year, but both the US and Houston outperform two years ago.

Type of Person Trips (Visitors)	CY 2010	CY 2011	CY 2012	2012 - 2011 % Change	2012 - 2010 % Change
Total US	1,085,333,000	1,143,376,000	1,107,702,000	-3%	+2%
Total Texas	83,751,000	84,102,000	80,843,000	-4%	-3%
Total Houston	12,852,0000	14,742,000	13,484,000	-9%	+5%
Q1	2,881,000	3,061,000	4,057,000	+33%	+41%
Q2	2,655,000	4,103,000	2,718,000	-34%	+2%
Q3	3,482,000	4,166,000	3,810,000	-9%	+9%
Q4	3,833,000	3,412,000	2,899,000	-15%	-24%

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)

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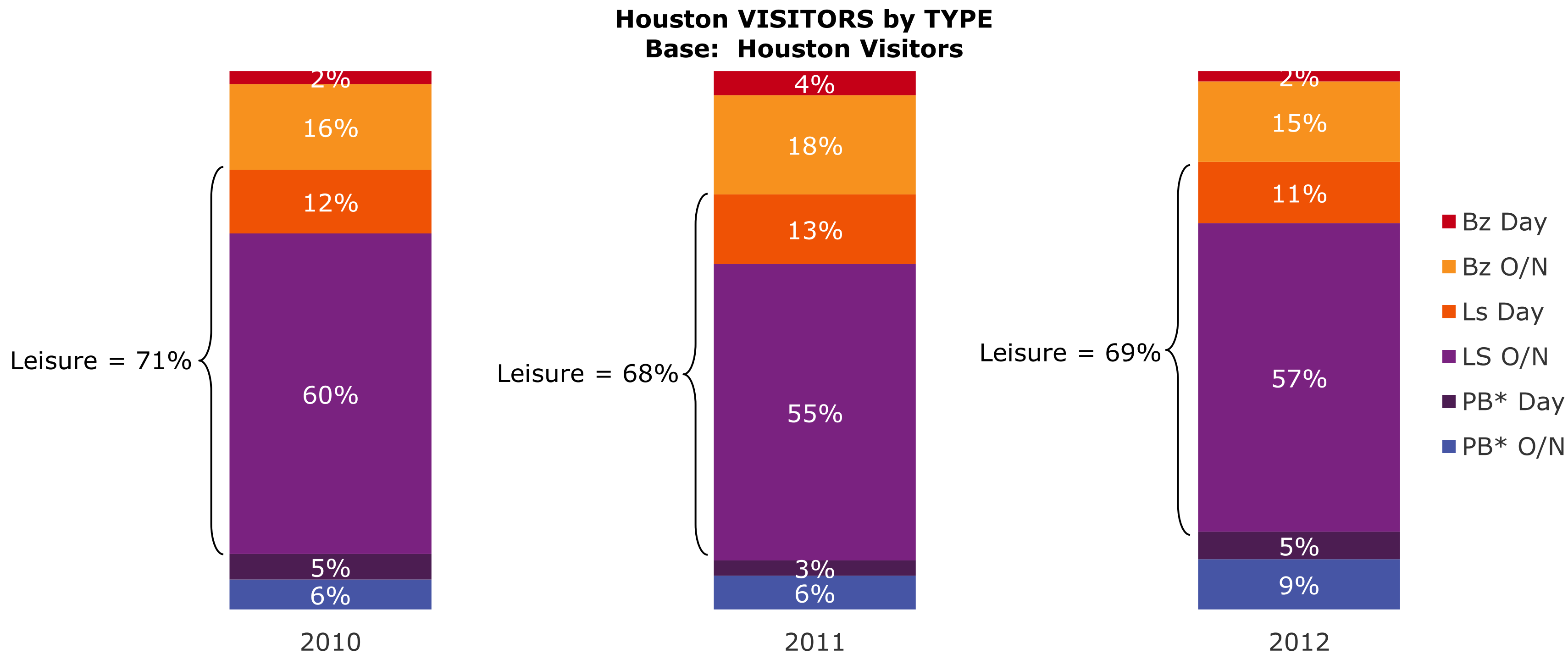
Visitor types

Trips of 50+ miles typically include an overnight stay, whether for business or leisure.



PB*: Personal Business/Other
Total: Day 31%; Overnight 69%
Leisure: Day 21%; Overnight 79%

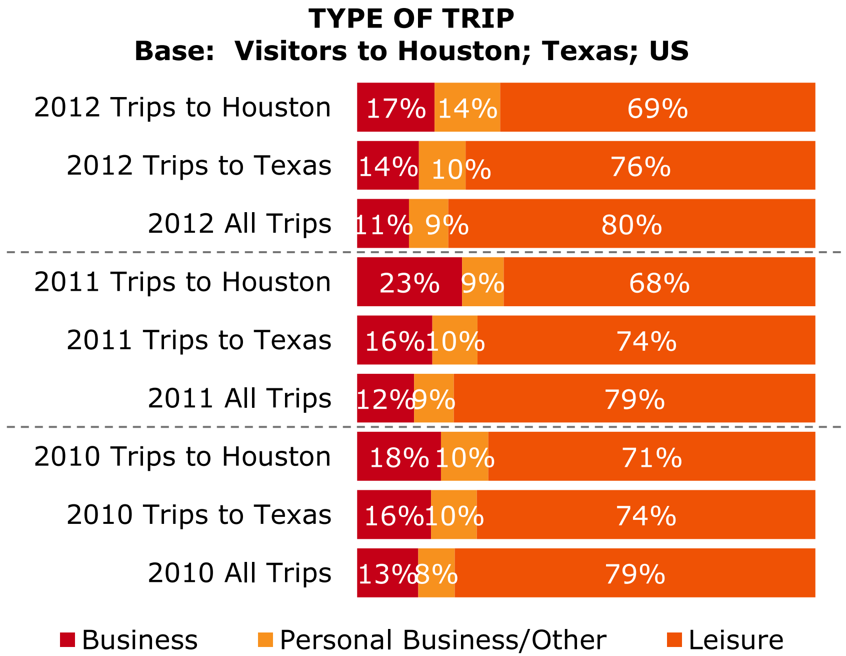
Q1b. Please select the primary purpose for trips . . . (demo wtd; trip level)

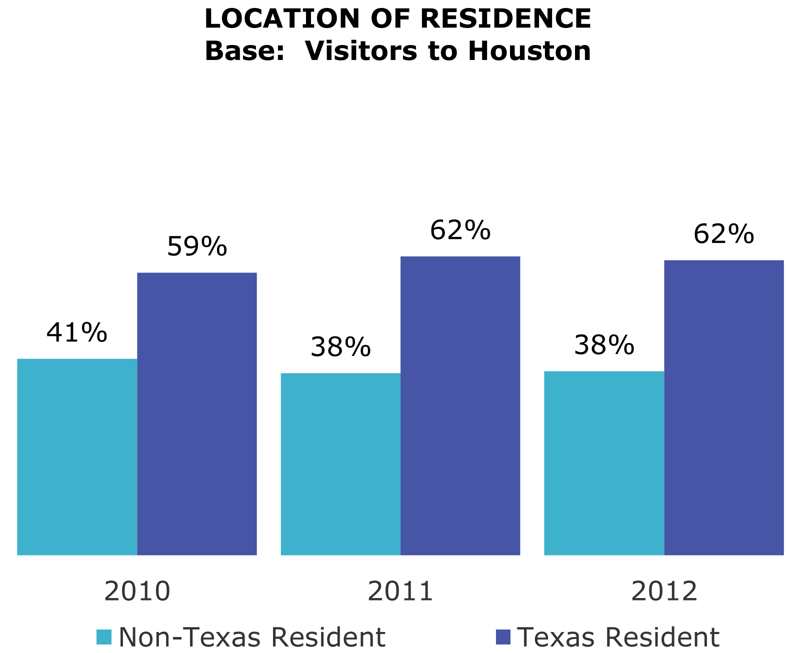
Trip purpose/visitor source

Overall:

- Two-thirds (69%) of Houston visitors primarily go there 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



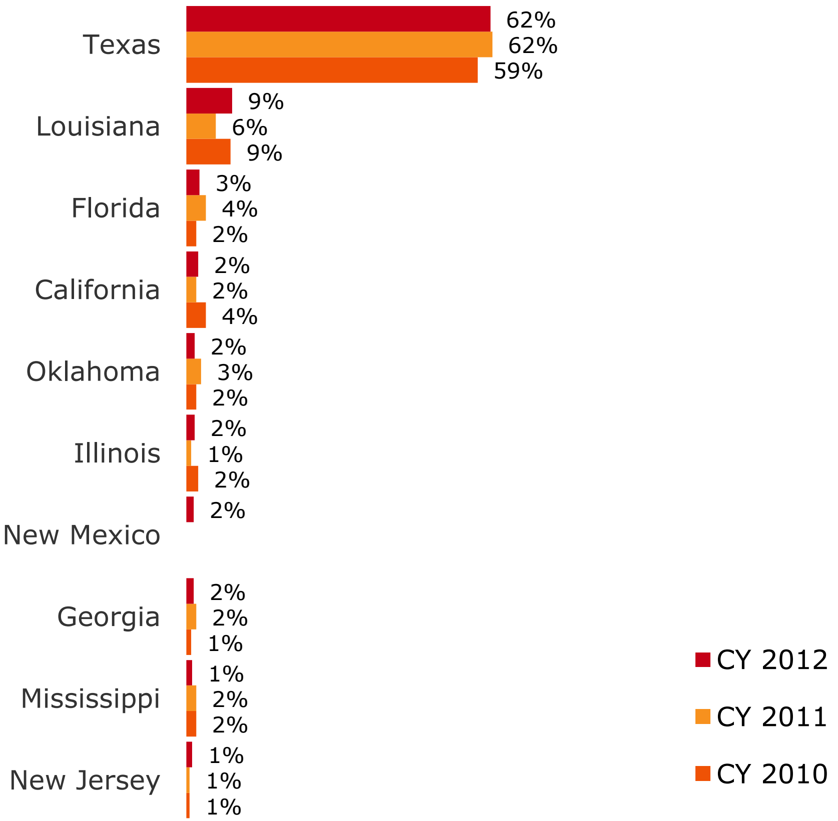


Q1b. Which of the following was the PRIMARY purpose of trip to . . . (Household Trip Level – demo wtd, not adjusted for travel party size)
Panel: Residence of visitors (Household Level)

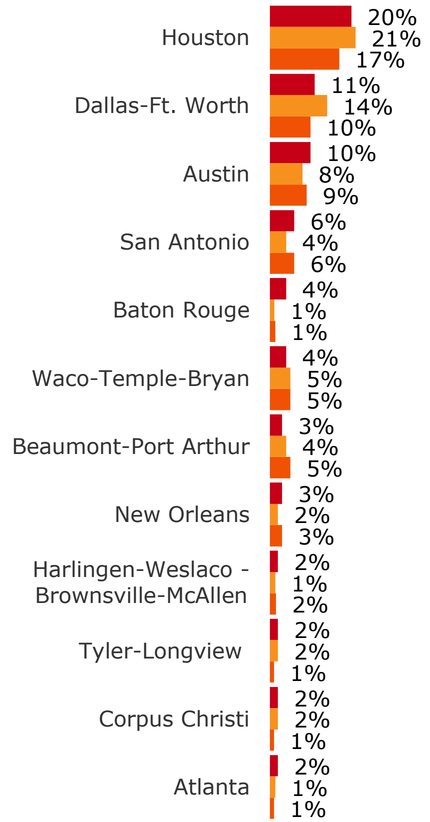
Visitor source by state/DMA

Proximity Counts: Most visitors (62%) live in Texas or in nearby states.

Source of Visitors: Top States (1%+)
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)

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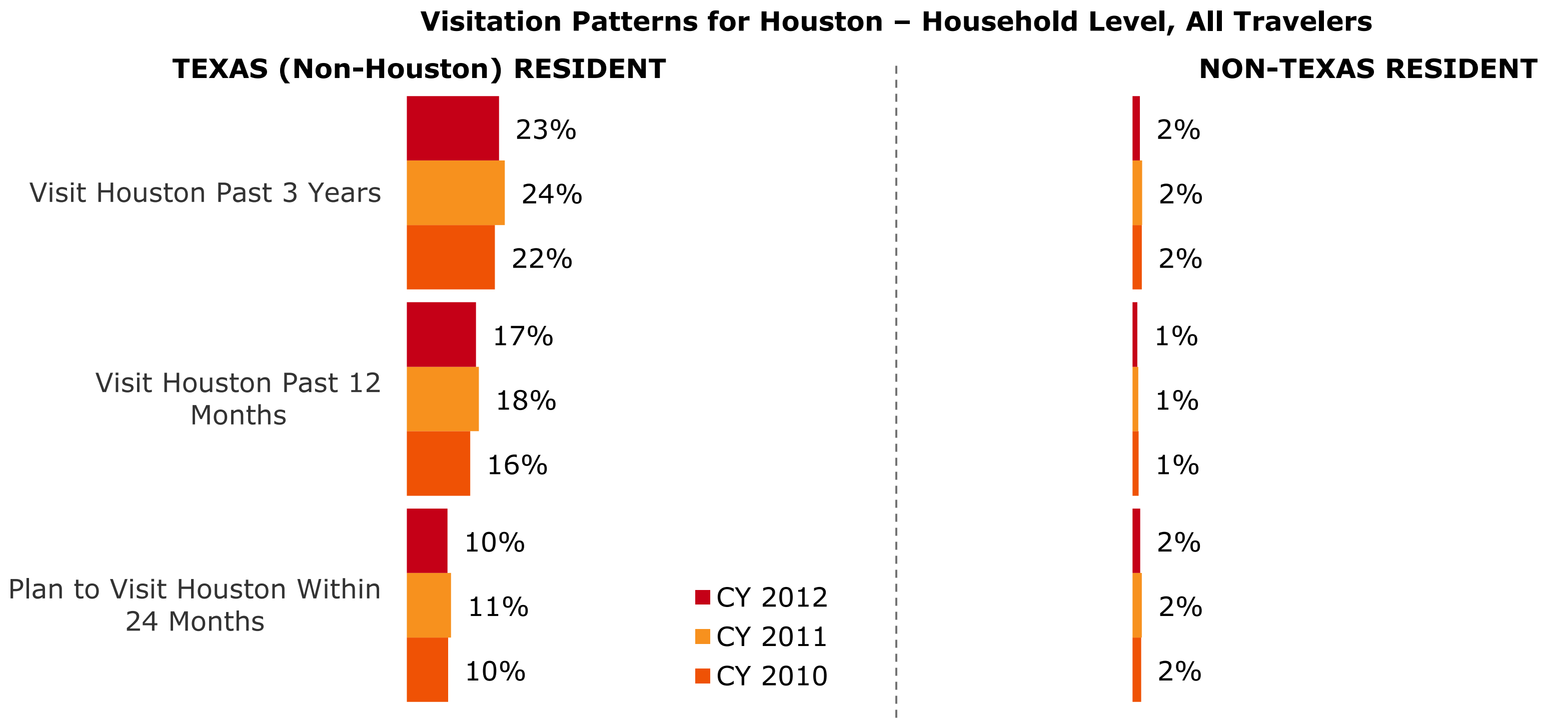
Destinations: Houston visitation

Typical of most destinations, Houston draws over half of its visitors from within the state (62%, shown earlier). Living farther away and having many destinations from which to choose, only a few Non-Texans (2%) visited Houston in the past three years.



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 incomes somewhat above overall US and Texas travelers, aided by the high incomes of New York, Chicago, and Washington, DC visitors
- Almost half (47%) of Houston visitors have 3+ people per household, underscoring the importance of the family market for Houston
- Houston claims an above average share of Spanish Origin and African-American visitors.

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

Prior year (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 demographics

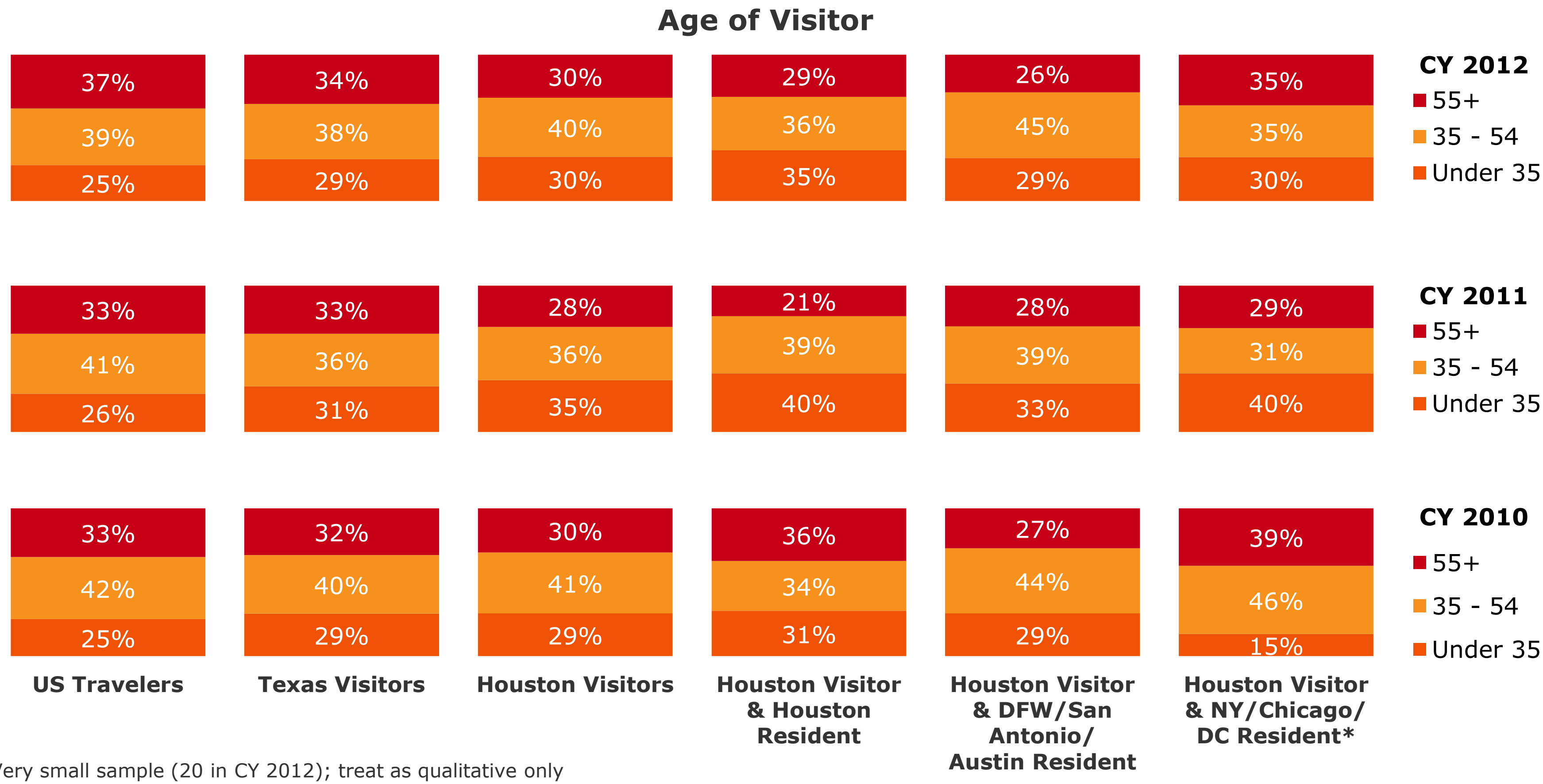
2010 data provided for ease of comparison

CY 2010 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	45	45	44	50
Average Hhld Income	$70,800	$70,600	$72,800	$69,100	$73,600	$113,700
% Male	38%	40%	36%	36%	39%	70%
% Married	58%	61%	60%	56%	60%	85%
Household Composition						
% One Person	22%	21%	23%	19%	26%	7%
% Two People	35	34	33	37	29	59
% Three or More	43	45	44	44	45	34
Ethnicity						
% Caucasian	86%	85%	81%	85%	76%	87%
% Spanish Origin	4	8	9	8	12	-
% African-American	7	7	10	8	12	7

*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.



*Very small sample (20 in CY 2012); treat as qualitative only
QD. How old are you . . . (Respondent Level, demo weighted)

Trip planning: timing

With fewer travel considerations (such as lodging or number of meals), day-trip visitors to Houston as well as Houston residents have the freedom to be much more spontaneous than others – with more than half considering and deciding within two weeks of the trip.

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

Prior year (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: timing

2010 data provided for ease of comparison

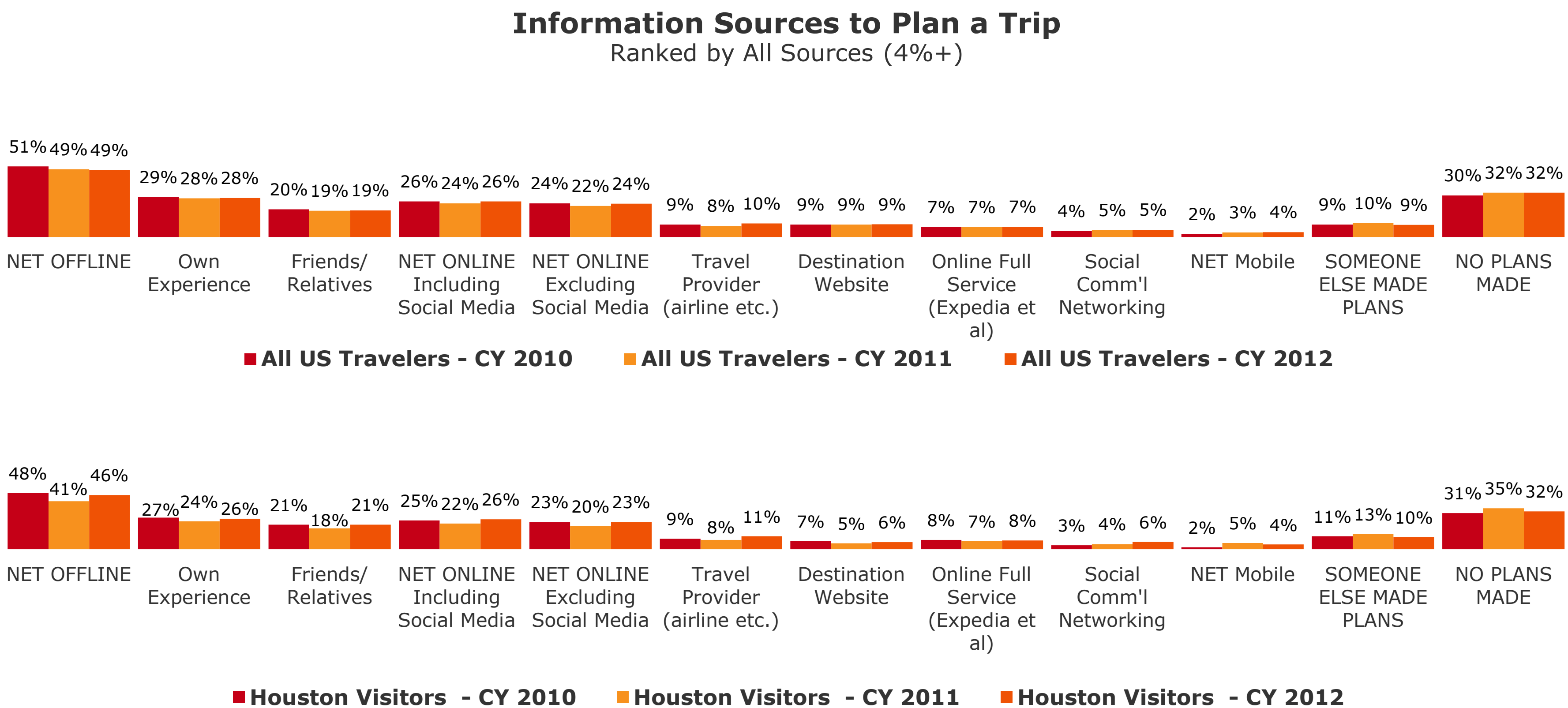
CY 2010 Trip Planning (Time Before Visit)	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
Considered								
Within Two Weeks	32%	34%	23%	55%	38%	60%	30%	9%
2 – 4 Weeks	14	13	15	5	14	6	16	22
1 – 3 Months	20	22	24	19	25	15	26	15
3+ Months	34	31	39	22	23	20	28	55
Decided								
Within Two Weeks	40%	43%	34%	63%	42%	67%	40%	9%
2 – 4 Weeks	15	16	18	11	15	14	17	22
1 – 3 Months	20	18	20	14	25	3	24	31
3+ Months	26	23	29	13	18	15	19	39

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

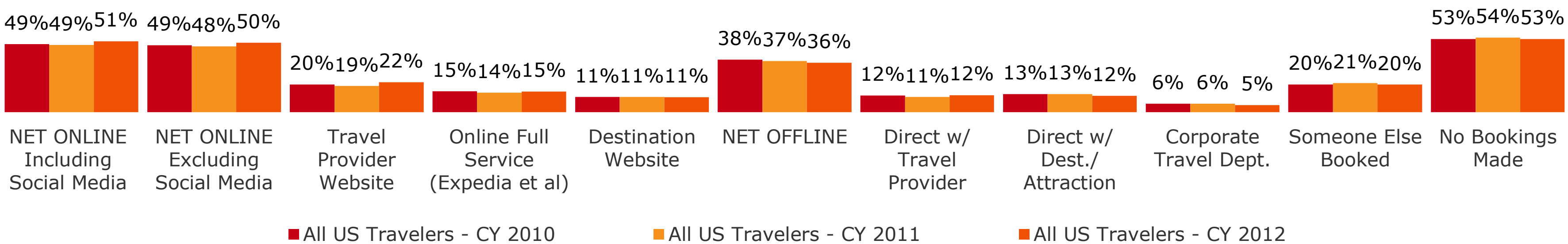
Only minor changes occur over time among trip planning information sources among Houston visitors and closely parallel US travelers overall.

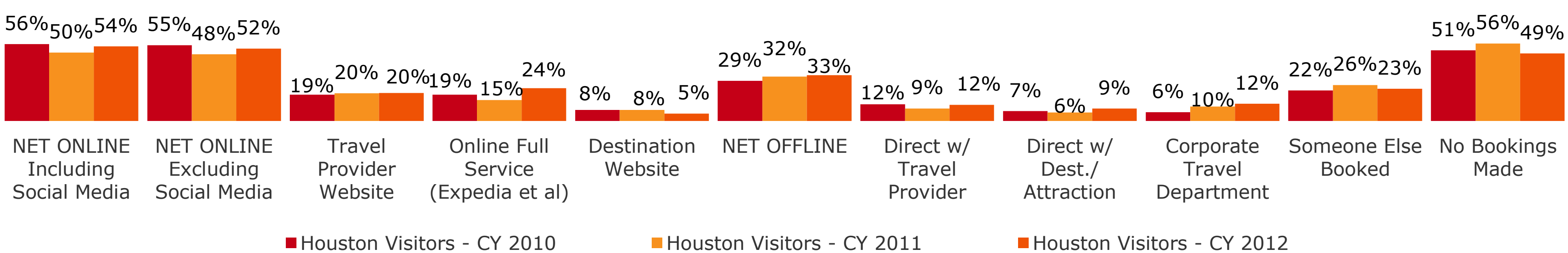


Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

Trip booking

Travelers, including Houston visitors, place greater emphasis on online than offline channels, especially travel provider websites and online travel agencies.





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 fewer leisure visitors (and more business visitors) than average (69% vs. 80% all US travelers), similar to last year.

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

Prior year (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: purpose & transportation

2010 data provided for ease of comparison

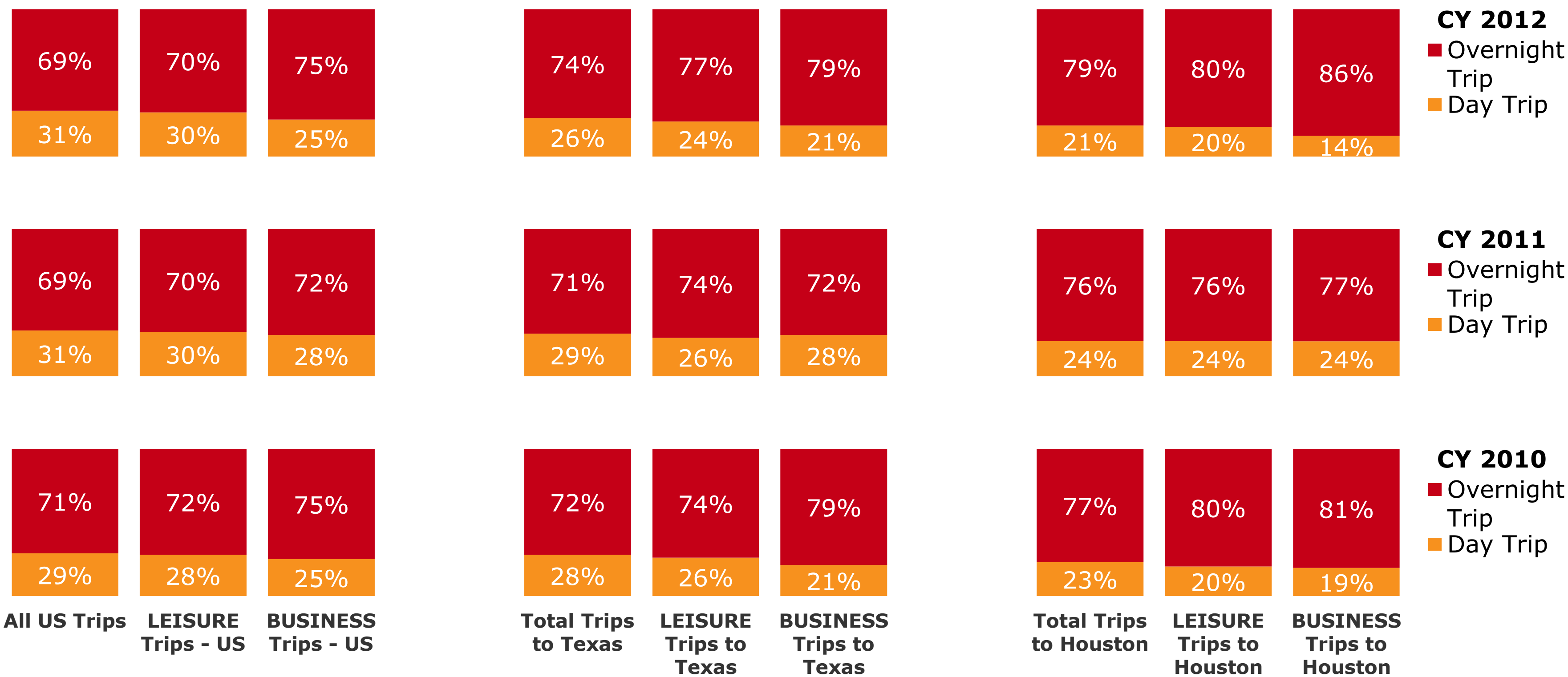
CY 2010	All US Travelers	Houston Visitors Total	Houston Visitors Ls Overnight	Houston Visitors Ls Day Trip	Houston Visitors Bz Overnight	Houston Visitors & Houston Residents	Houston Visitor & DFW/Austin/ San Antonio Resident	Houston Visitor & NY/Chicago/ DC Resident*
PRIMARY TRIP PURPOSE								
NET Leisure/Personal	79%	71%	100%	100%	--	75%	73%	52%
Visit Friends/Relatives	41	52	77	51	--	44	56	41
Entertainment/ Sightsee	13	7	9	17	--	13	4	12
Outdoor Recreation	7	2	2	5	--	5	2	--
NET Business	13	18	--	--	100	9	19	41
Personal Bs/Other	6	8	--	--	--	14	5	--
PRIMARY MODE								
% Own Auto/Truck	72%	67%	72%	89%	28%	89%	86%	15%
% Air Travel	17	23	20	3	57	4	4	80
% Rental Car	4	5	5	1	8	3	7	--
% Other	3	3	1	7	3	2	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: day/overnight

Most Trips Include an Overnight Stay and Houston continues to draw a larger share overnight visitors than other US or Texas visitors.

DAY/OVERNIGHT TRIPS
% of Trips to Area
Base: Trips to Houston; Texas; Total US



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

Trip characteristics: lodging and length of stay

Overnight visitors average 3 to 4 nights in Houston, with business travelers much more likely (66% vs. 26%) to stay in a hotel.

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 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
CY 2010								
AVG # NIGHTS (if any)	3.4	3.4	3.3	--	3.4	2.2	2.7	5.1
Private Home	1.5	1.7	2.0	--	0.4	0.9	1.5	2.2
Hotel/Motel	1.2	1.3	0.9	--	2.8	1.1	1.0	2.9
All Other	0.7	0.4	0.4	--	0.2	0.2	0.2	0.0

* 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 travelers commonly arrive in pairs (40%) and many (a third of them) bring their children.

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 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
CY 2010						
AVERAGE # IN TRAVEL PARTY (Q3a)	2.7	2.6	2.6	2.5	2.8	3.1
% Travel in Pairs	38%	34%	37%	37%	38%	14%
% Traveling with Children	26	24	30	29	37	8
Avg. # of Children on Trip (if any)	2.1	2.1	2.0	2.0	2.0	2.7
Average # in Travel Party in Household	2.0	2.0	2.1	2.1	2.4	1.3

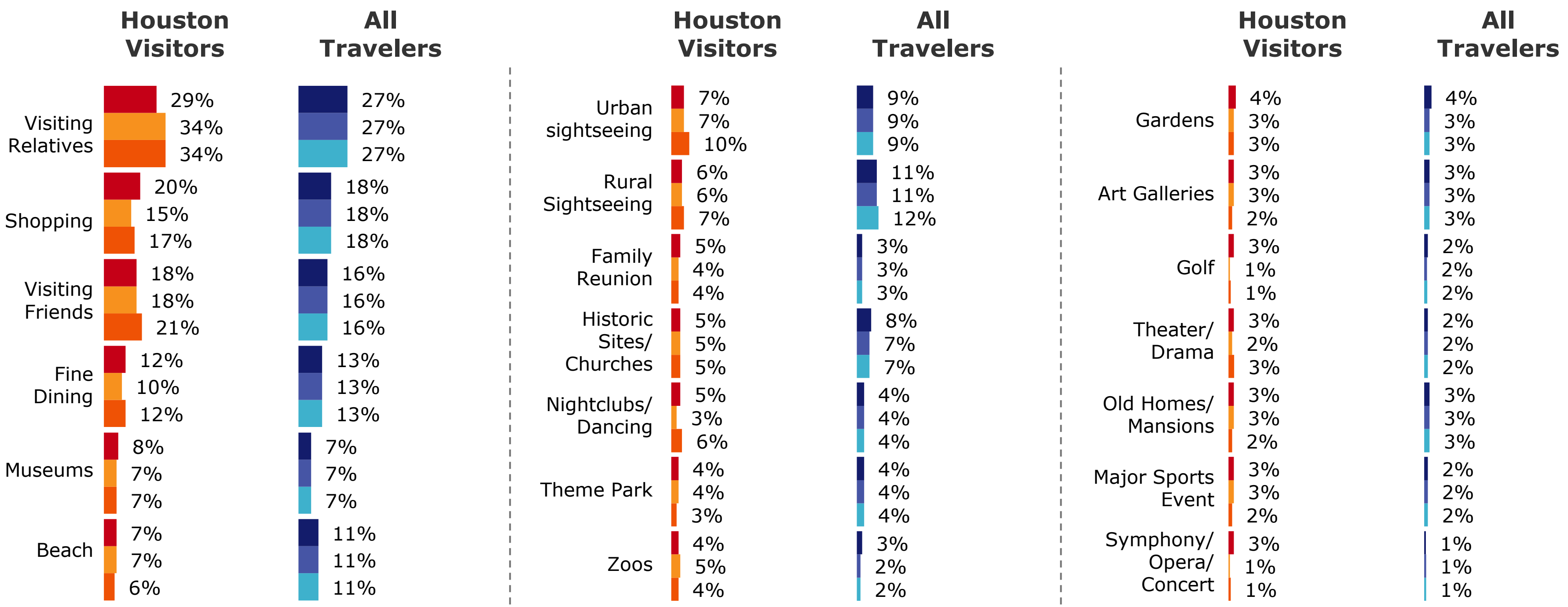
Q3a/b: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)

Trip characteristics: vacation activities/attractions

Compared to total US travelers, Houston visitors more often visit for social engagements -- *visiting relatives* and *friends* capture two of the top three spots. Urban highlights such as *shopping, fine dining*, and *urban sightseeing* are about as popular for Houston visitors as elsewhere while more outdoorsy options (*beaches* and *rural sightseeing*) lag the national average.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Houston Visitors (Activities with 2% or fewer for Houston not shown)



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

- Houston Visitors - CY 2012
- Houston Visitors - CY 2011
- Houston Visitors - CY 2010
- All Travelers - CY 2012
- All Travelers - CY 2011
- All Travelers - CY 2010

Trip characteristics: vacation activities/attractions

Visitors From:

- Dallas: Note few specific reasons for visiting (half fail to cite a reason)
- San Antonio/Austin: come to see family and enjoy the cuisine
- Elsewhere: find many things appealing – shopping, visiting, culture
- Locals: Shop.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Houston Visitors (Activities with 3%+ shown)

Green = above average / Orange = below average

Houston Visitors CY 2012	All Houston Visitors	Visitors From DFW	Visitors From Houston	Visitors From San Antonio/Austin	Visitors From Other Texas	Visitors from Outside Texas
Base:	682	75	136	108	106	257
Visiting Relatives	29%	27%	17	34%	31%	34%
Shopping	20	13	24	10	25	23
Visiting Friends	18	17	13	15	21	20
Fine Dining	12	3	13	15	6	16
Museums	8	10	3	5	14	10
Beach	7	7	8	0	5	10
Urban Sightseeing	7	8	4	1	9	9
Rural Sightseeing	6	3	7	0	11	7
Family Reunion	5	6	0	2	7	7
Historic Sites/ Churches	5	3	5	1	1	9
Nightclubs/ Dancing	5	4	4	0	9	6
Theme Park	4	1	3	3	6	6
Zoos	4	3	4	5	3	5
Gardens	4	3	1	2	6	5
Art Galleries	3	2	0	0	12	3
Old Homes/Mansions	3	0	0	0	11	3
Golf	3	0	1	4	3	5
Major Sports Event	3	0	2	4	6	2

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

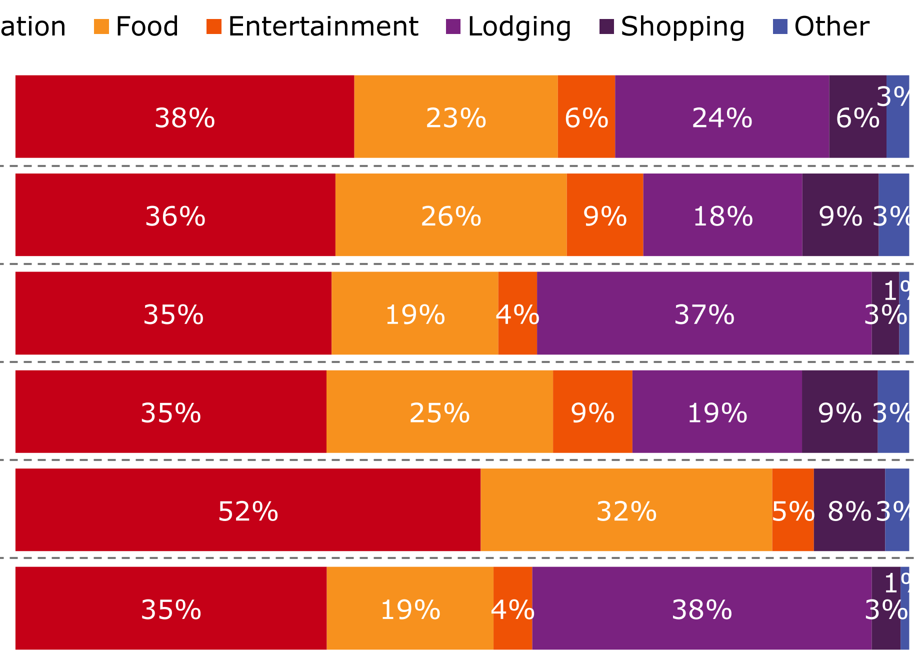
Trip characteristics: expenditures by type of travel

Value of Visitors by Type of Trip:

- Overnight LEISURE visitors spend over 3 times as much as day-trip visitors ($517 vs. $152)
- Usually staying in hotels, business travelers spend more than leisure visitors ($644 vs. $445)
- Houston's leisure visitors spend more than last year, business travelers spend less.

Average Spending in Houston by Trip Type

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



		Spending	
		CY 2010	CY 2011
Total Visitors	CY 2012 ($514)	$432	$498
Leisure Total	CY 2012 ($445)	$368	$428
Business Total	CY 2012 ($644)	$713	$756
Leisure Overnight	CY 2012 ($517)	$435	$498
Leisure Day	CY 2012 ($152)	$110	$205
Business Overnight	CY 2012 ($740)	$843	$933

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

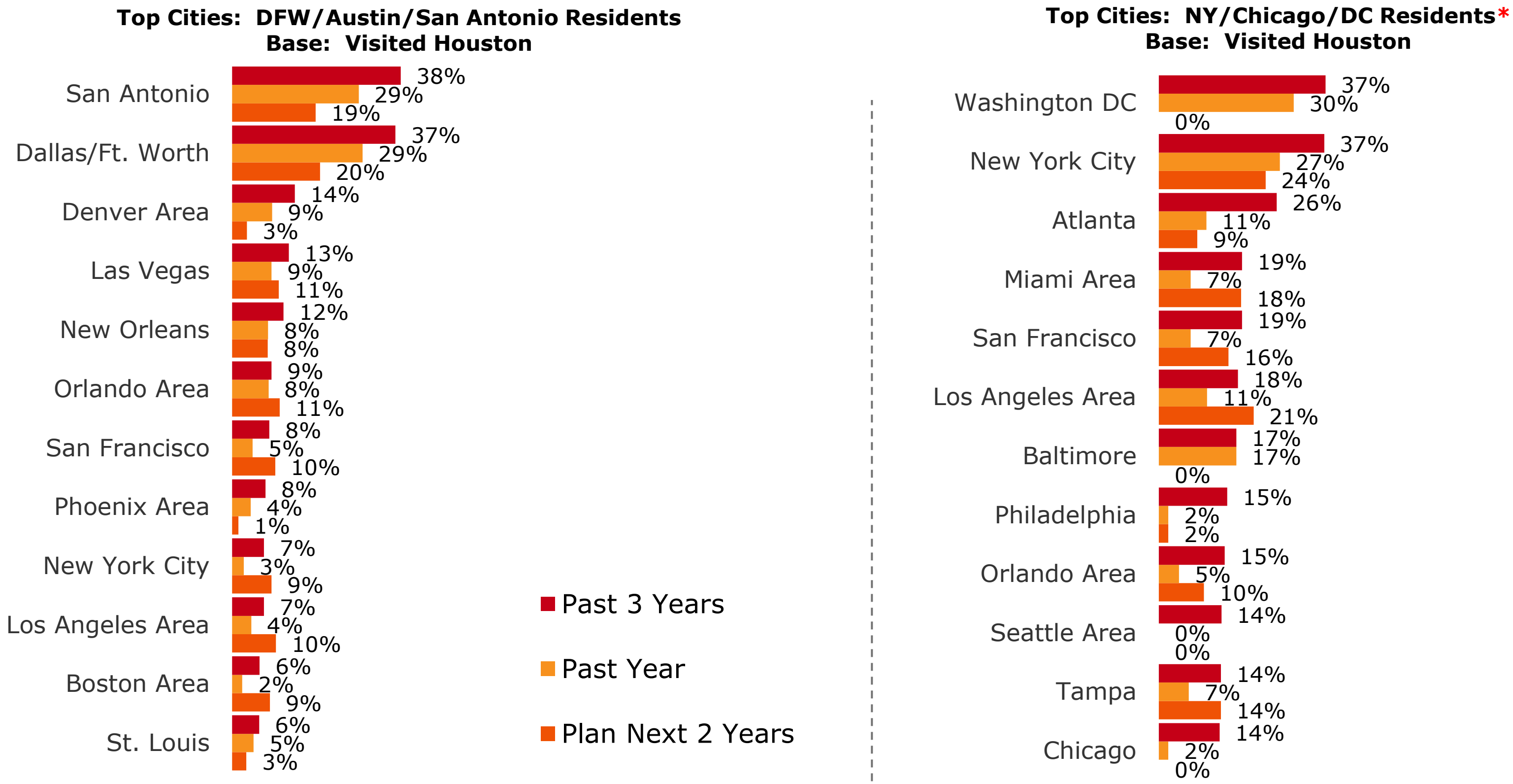
Top States: NY/Chicago/DC Residents*
Base: Visited Houston

*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 within Texas often visit other Texas destinations (San Antonio and Dallas/Ft. Worth; visitors from the larger cities tend to visit DC and NYC.

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

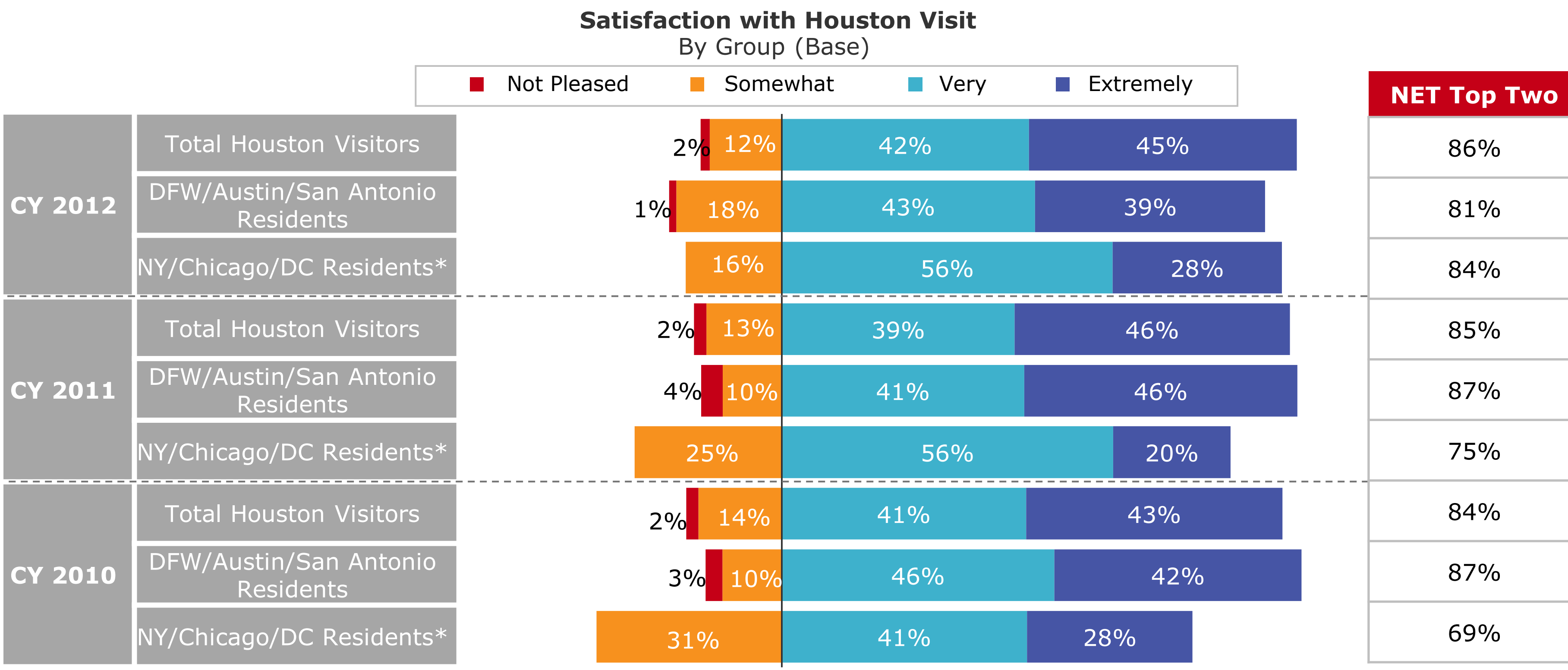


*Caution: Very small base

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

Overall, Houston satisfies more than four out of five (86%) visitors, similar-to-slightly better than the prior two years, with larger gains noted by NY/Chicago/DC residents. Few visitors (2% - 4%) 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.)

TNS

4
Appendix IIa. Opinions About Houston and Competitors from Follow-up Survey

Demographics

Characteristics vary slightly by residence:

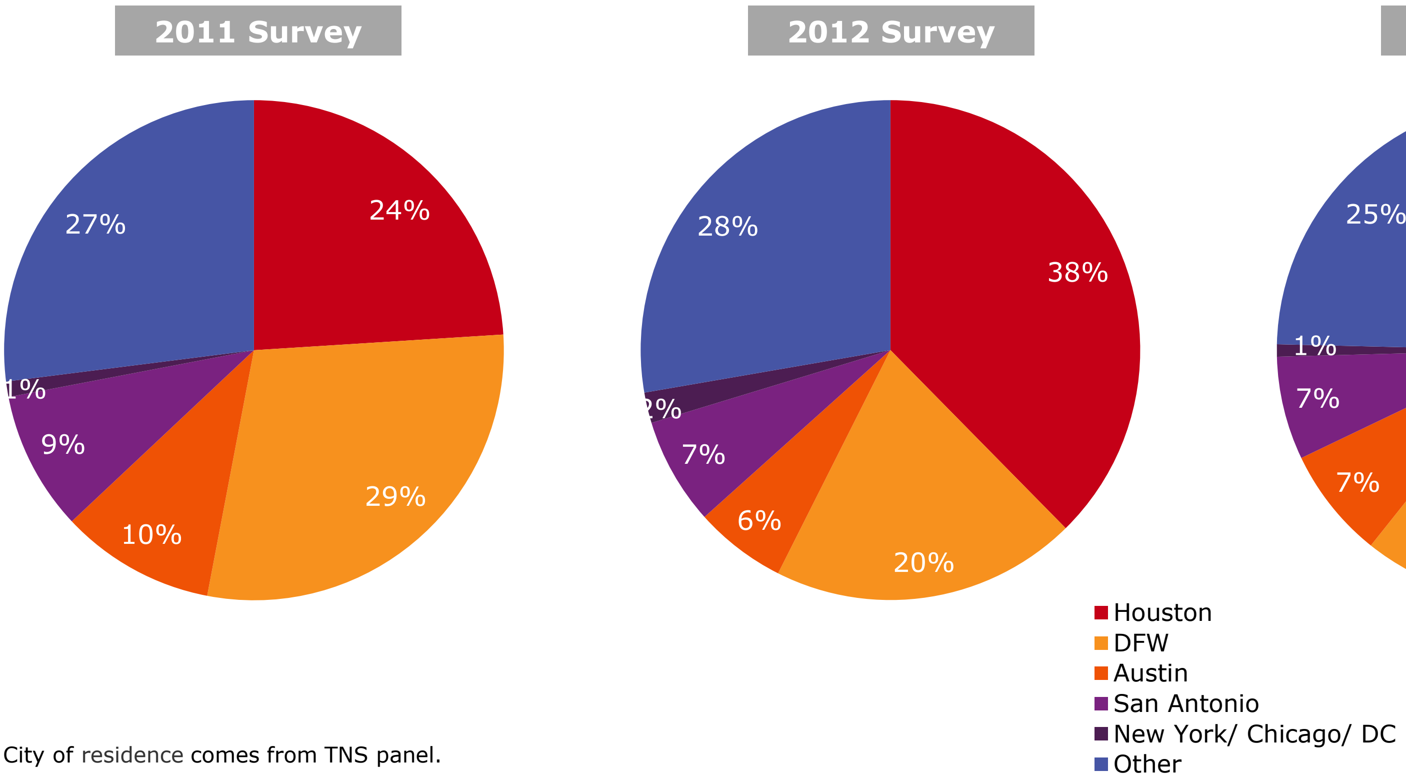
- Non-Texas residents continue to report higher income and education levels than Texas residents
- Slightly more non-Houston Texans claim Spanish heritage.

2013 Survey Demographics	All Travelers	Past Yr. O/N Leisure Visitors	Houston Residents	Other Texas Residents	Non-Texas Residents	Website Visitor
Average Age	55	54	55	54	58	53
Average Hhld Income	$73,023	$78,147	$73,150	$71,056	$80,854	$7,7106
% 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
2011 Survey						
Average Age	53	52	53	53	51	52
Average Hhld Income	$67,800	$71,200	$72,800	$64,900	$77,000	$66,800
% Male	34%	34%	32%	34%	35%	34%
% Married	65	65	66	65	64	65
% College Grads+ (Males)	32	37	33	31	41	35
Ethnicity						
% Caucasian	86%	81%	82%	87%	84%	74%
% Spanish Origin	6	5	6	7	5	4
% African-American	8	11	11	6	9	17

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

Residence

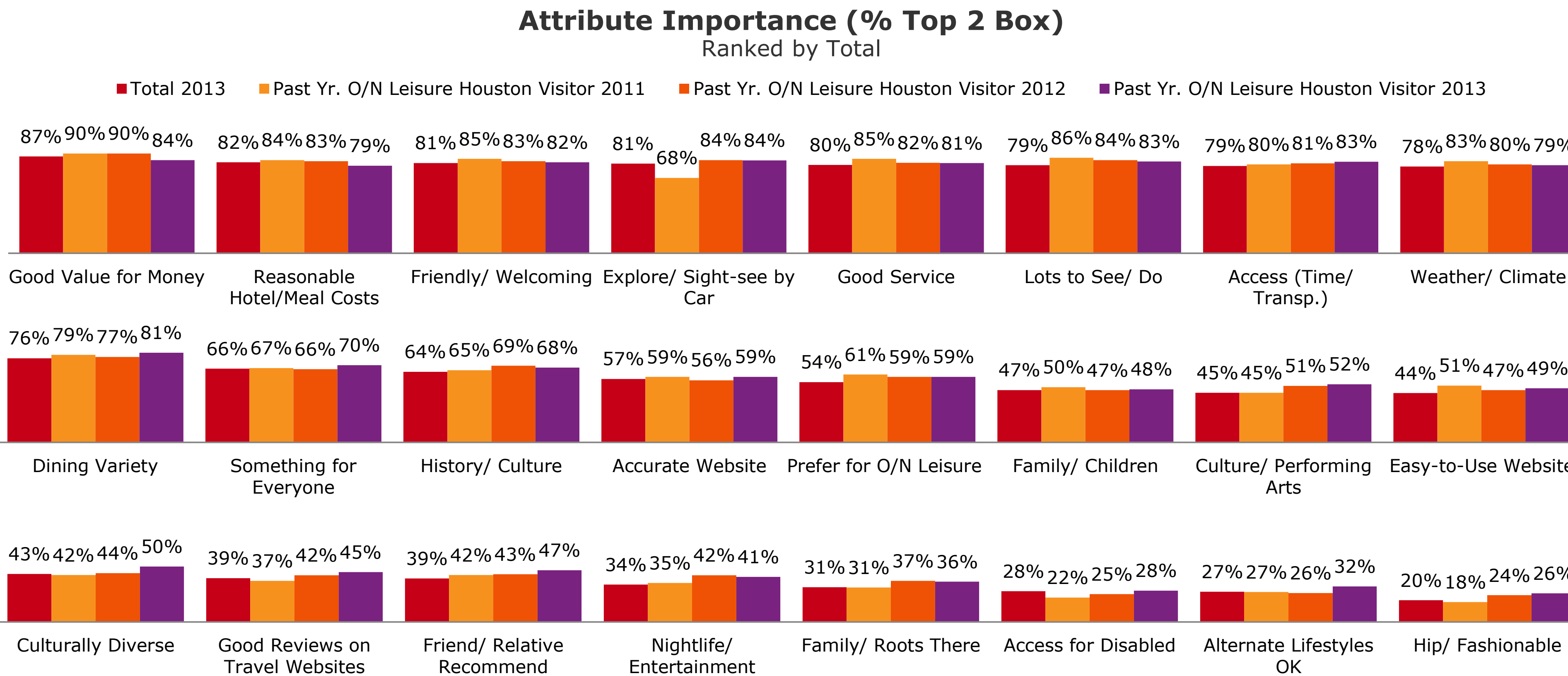
Three quarters of respondents (74%) live in one of the major Texas DMAs, similar to last year; more than a third live in Houston (38%).



City of residence comes from TNS panel.

Attribute importance

Houston overnight leisure visitors give an edge to *culture/performing arts, diversity, good reviews* (either websites or friends/relatives), and *nightlife/entertainment*.



*PY O/N Leisure HV = Past Year Overnight Leisure Houston Visitor

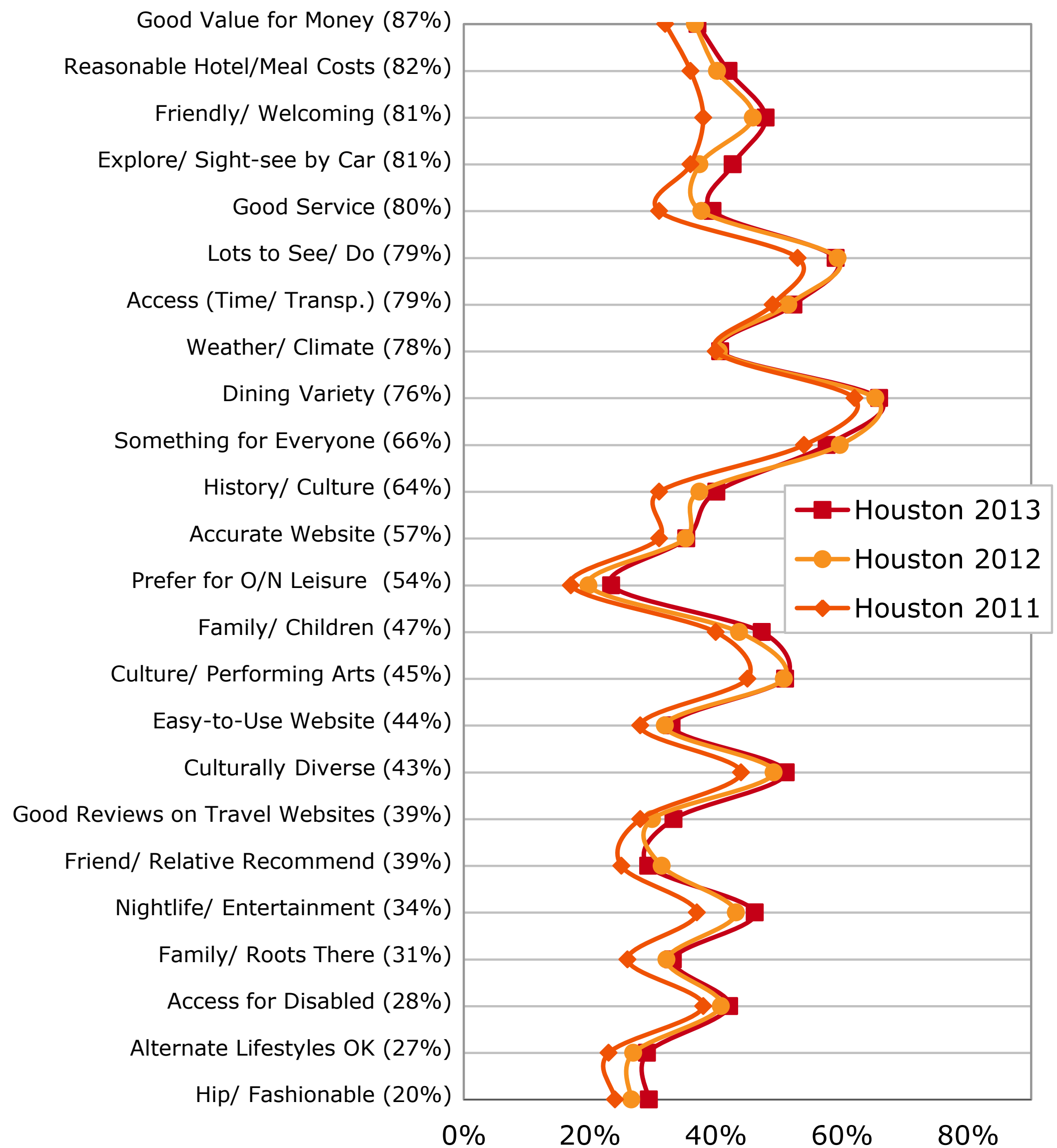
Q1a/b. Abridged: Using a scale of 1 (not at all important) to 5 (extremely important) please rate the importance of each of the following attributes when selecting a destination.

Preference for Houston

Ranked by Total Importance (top 2 box)

Houston tends to place equal to or slightly above the prior two years:

- Houston receives the highest marks (50%+) on *variety of dining options, lots to see/do, easy accessibility, something for everyone, rich in culture/performing arts*, and *culturally diverse*
- The weakest scores occur for: the *preferred place for overnight leisure vacations, friendliness to alternative lifestyles, heard about it from friends/relatives*, and *hip/ fashionable.*



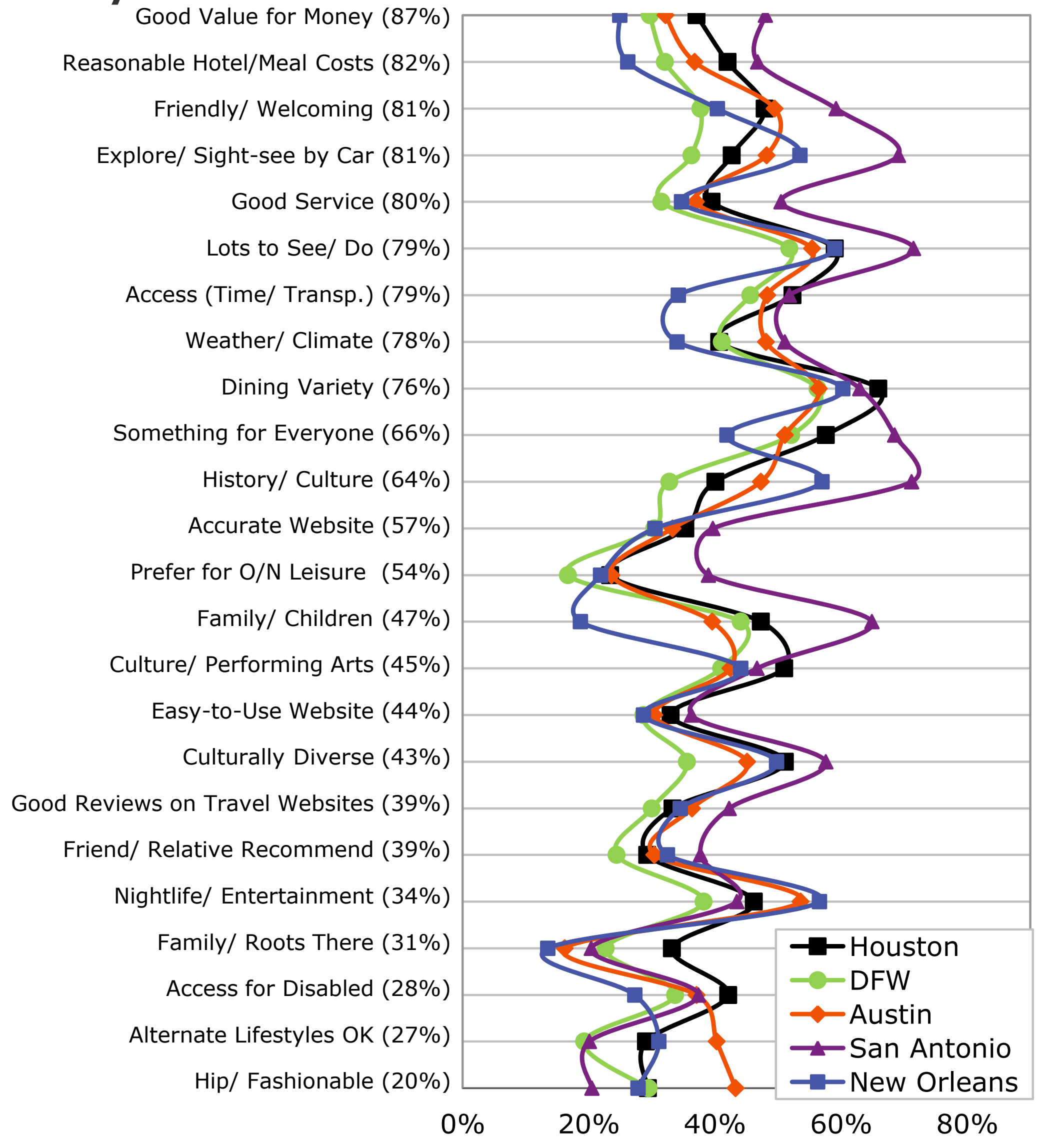
Q2a/b. For each of the attributes mentioned below, please select the destinations you prefer . . . % selecting each city.

Preference for each Texas city

Ranked by Total Importance (top 2 box)

Mirroring last year, San Antonio excels on most attributes, including the most important ones, while travelers view Houston as comparable, often better, than other major Texas cities:

- Travelers rate Houston as the leader among these five cities on *variety of dining options, cultural/performing arts, family/roots there*, and *access for the disabled*, and ties San Antonio for *general accessibility*
- Houston ranks second on the two most important items (*value* and *costs*), plus several others: *good service, lots to see/do, something for everyone, accurate and easy to use website, family/children, culturally diverse*, and *hip/fashionable*
- Houston never ranks last.



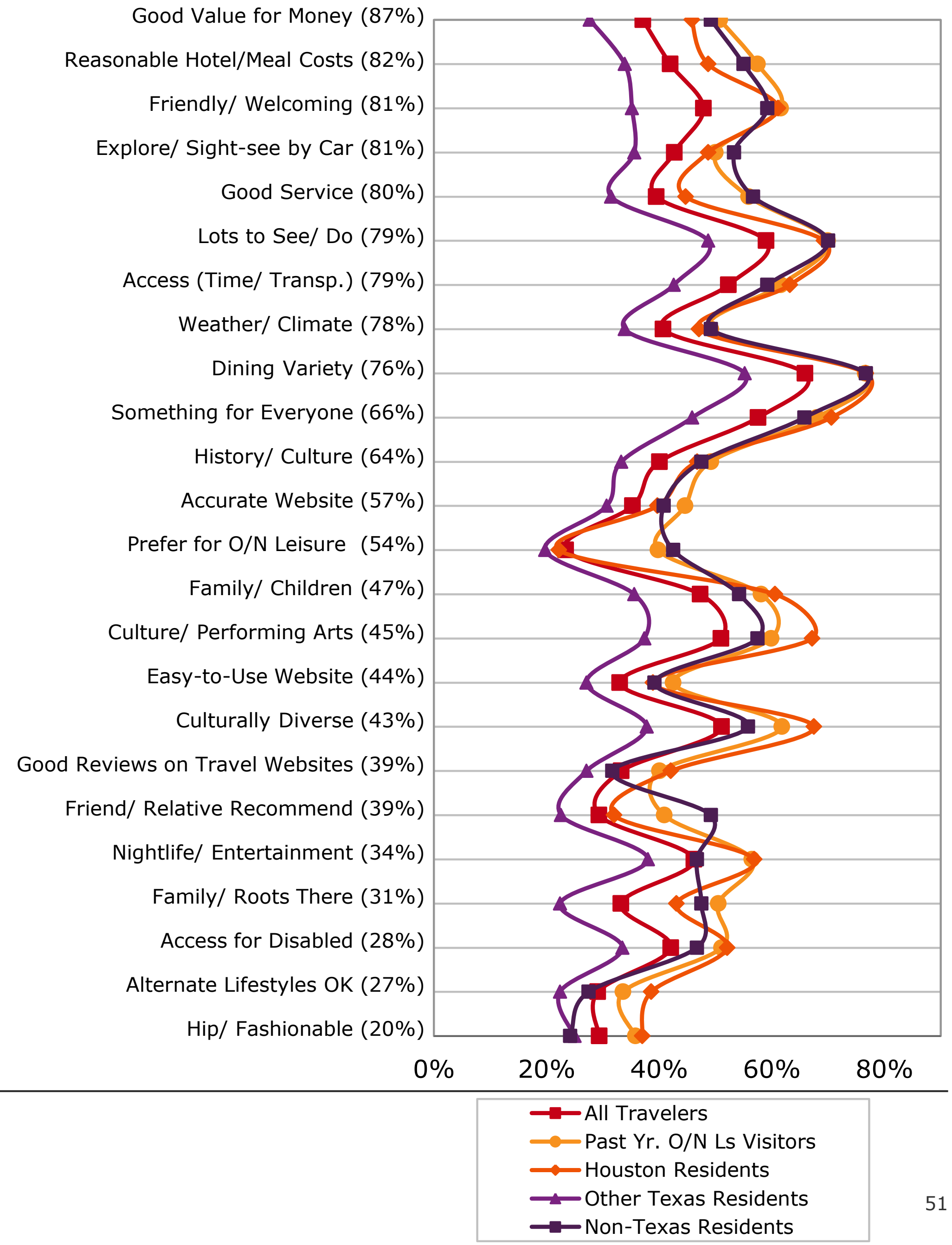
Q2a/b. For each of the attributes mentioned below, please select the destinations you prefer . . . % selecting each city.

Preference for Houston

Ranked by Total Importance (top 2 box)

As expected, since a visit indicates strong interest almost by definition, those who visited Houston overnight for leisure in the past year tend to rank Houston very high on most attributes; Houston residents usually join them in the accolades:

- In contrast, and consistent with results from last year, Non-Houston Texas residents tend to rank Houston lower than other groups
- Houston residents make good advocates – consistently preferring Houston, especially for (60%+): *dining, accessibility, a place with something for everyone, lots to see/do, friendly/ welcoming, culture and performing arts, cultural diversity*, and as *a place good for family/children*.



Q2a/b. For each of the attributes mentioned below, please select the destinations you prefer . . . % selecting each city.

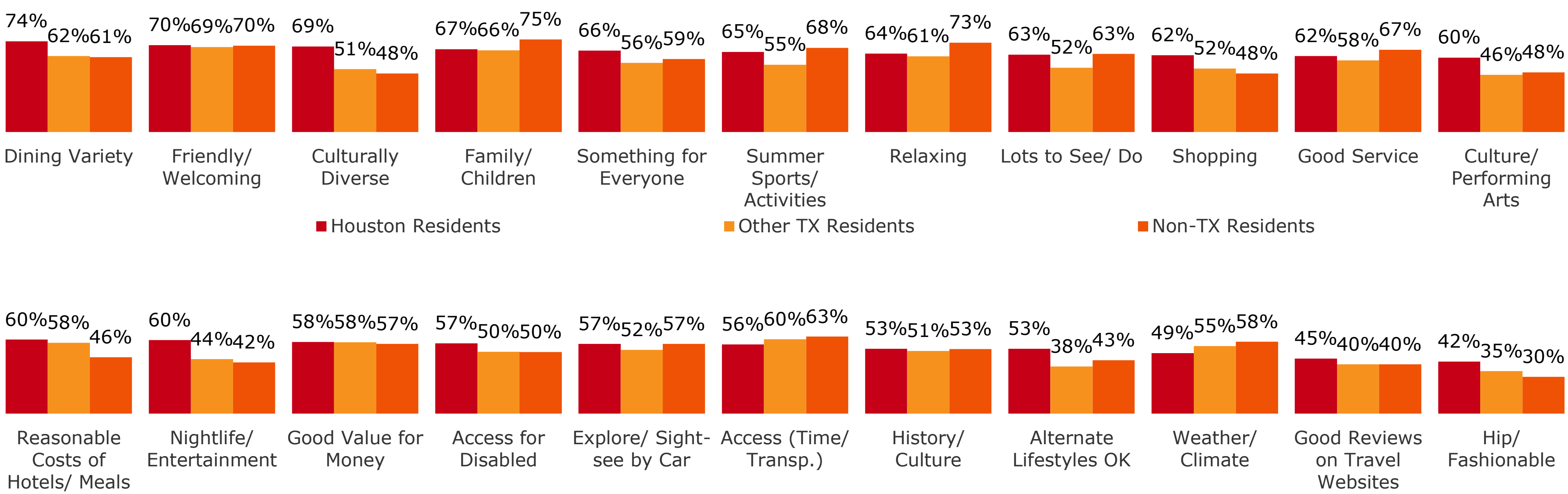
Cities "good to visit" for non-resident visitors

A destination's own residents can be its best ambassadors. Houston's populace knows the city best, often scoring Houston above the average of other cities by their residents:

- Houston residents see their city as an active urban playground with well-above average scores for *dining, cultural diversity, shopping, culture/performing arts, nightlife/entertainment, alternative lifestyles*, and *hip/fashionable*.
- In contrast, Houston residents would not be as quick to recommend the city for its *weather/climate*.

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

Ranked by Houston Residents



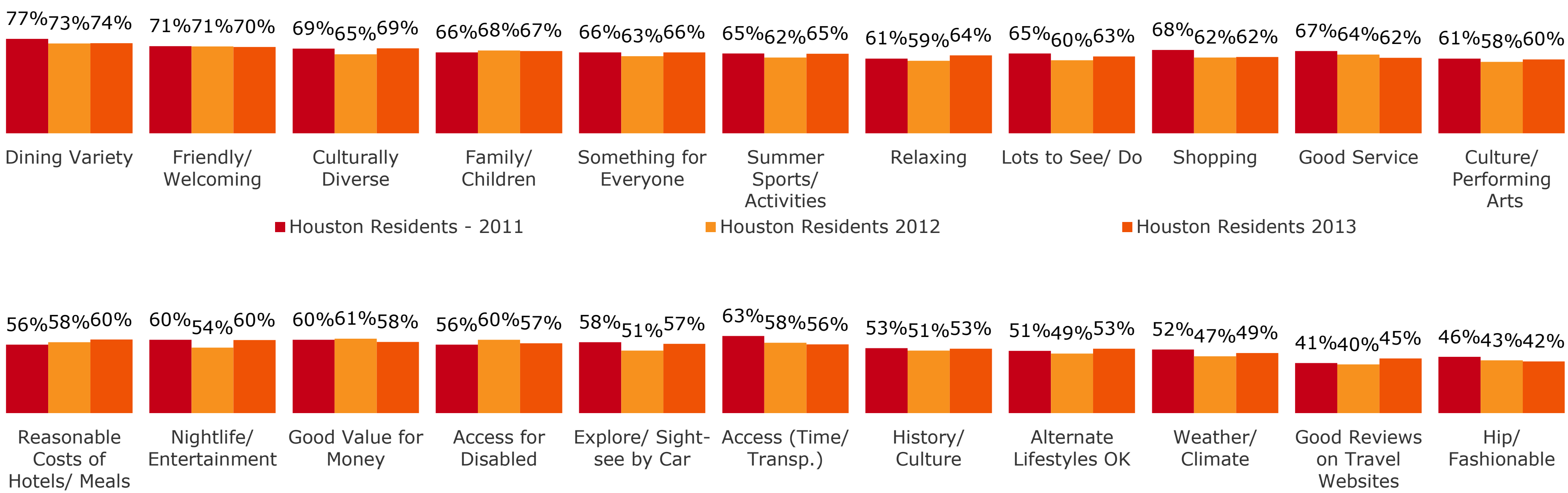
Q3. Abridged: Please rate the city where you live on how well each statement describes your city as a leisure destination for those who do not live there.

TNS

Houston "good to visit" trends

Compared to prior years, Houston residents see their city as increasingly economical (*reasonable costs*), but steadily slips on *good service, accessibility*, and *hip/fashionable*.

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

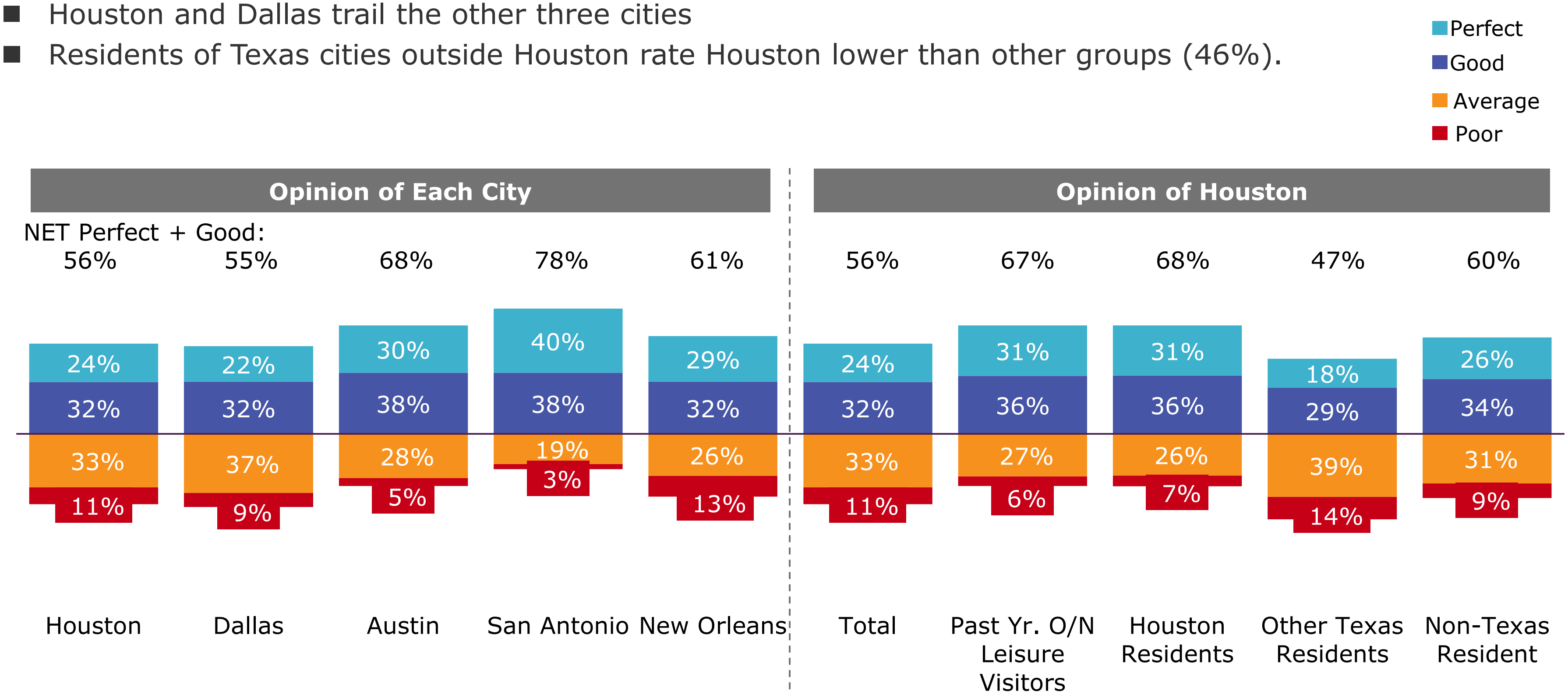


Q3. Abridged: Please rate the city where you live on how well each statement describes your city as a leisure destination for those who do not live there.

Quality of cities as destinations

Travelers continue to rate San Antonio higher than other cities when thinking of "everything you look for in a leisure destination" while:

- Houston and Dallas trail the other three cities
- Residents of Texas cities outside Houston rate Houston lower than other groups (46%).

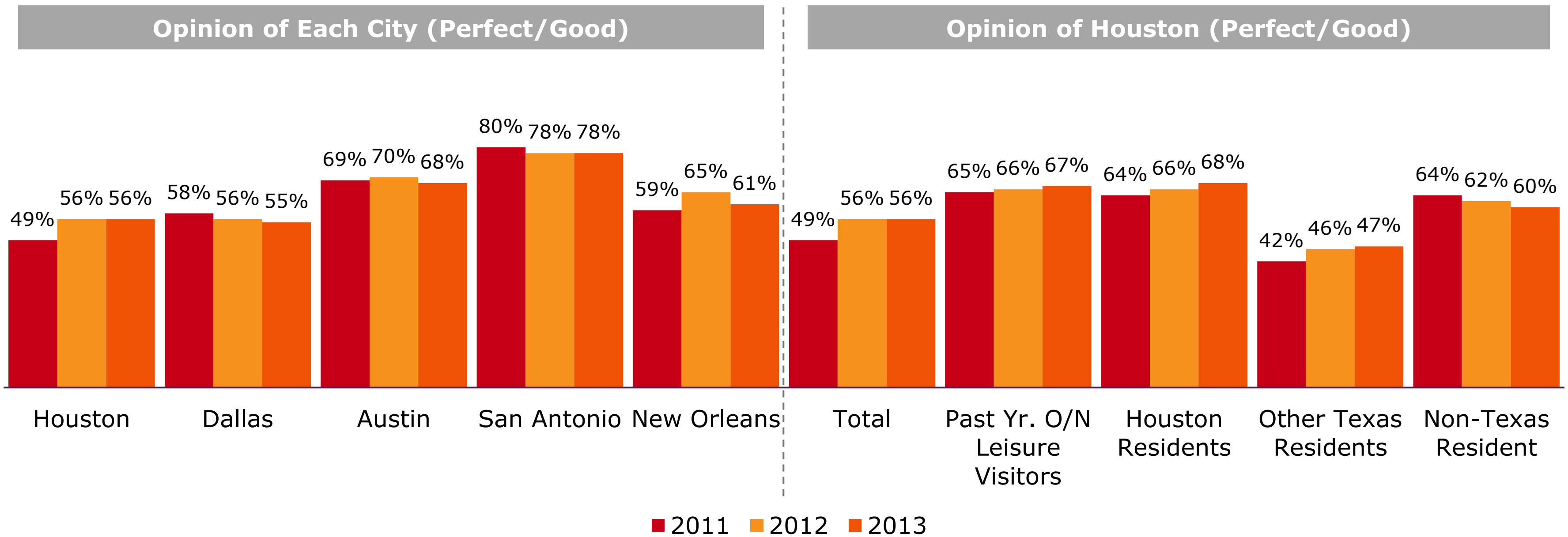


Q4. Now, we would like you to rate each of the listed cities, whether or not you live there or have visited them, on a 10-point scale (10=perfect; 1=terrible). Taking into account everything you look for in a leisure destination, how would you rate each city?

Quality of cities as destinations - trends

When thinking of "everything that is wanted in a leisure destination," travelers:

- Continue to praise San Antonio above other cities
- Rate Houston the same as last year and it now ever-so-slightly overtakes Dallas
- As in the past, Texans outside of Houston find the greatest fault with Houston (only 47% perfect/good).

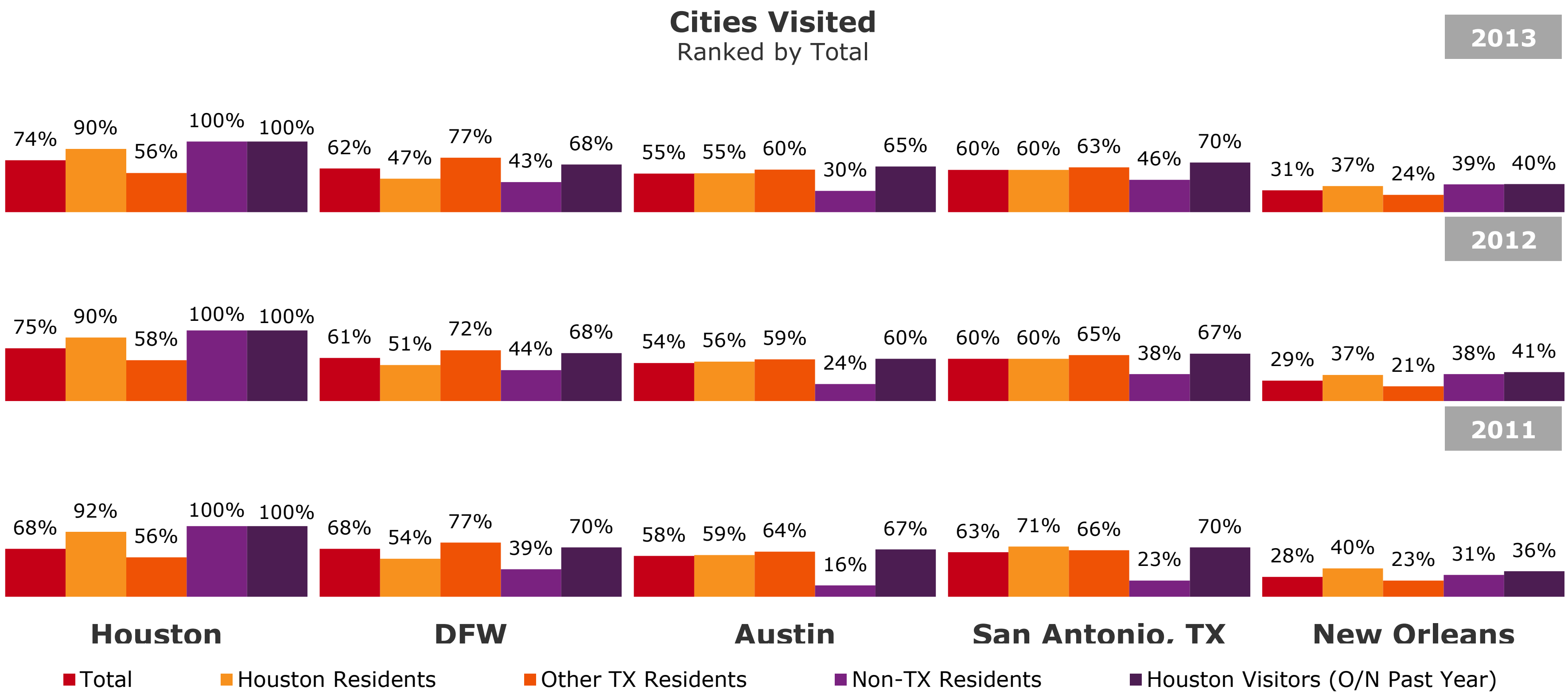


Q4. Now, we would like you to rate each of the listed cities, whether or not you live there or have visited them, on a 10-point scale (10=perfect; 1=terrible). Taking into account everything you look for in a leisure destination, how would you rate each city?

Competitive cities visited

In a pattern similar to last year, Houston visitors show interest in these other cities:

- San Antonio attracts many, reigning as the most popular destination (after Houston) among Houston residents and non-Texans who visit other Texas cities besides Houston
- Dallas-Fort Worth claims the lead for non-Houston Texas residents.

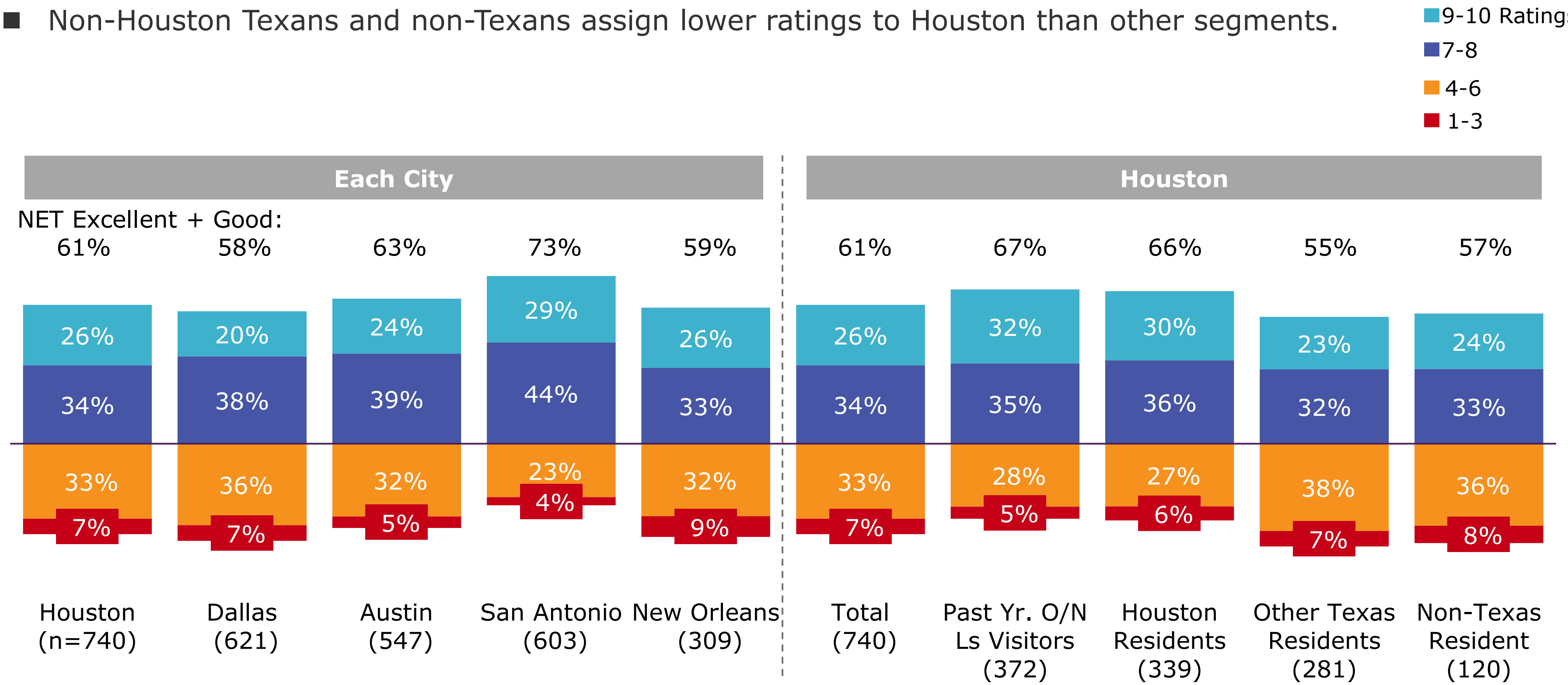


Q5. Which of the following cities have you visited in the past 5 years?

Value for the money - cities as destinations

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

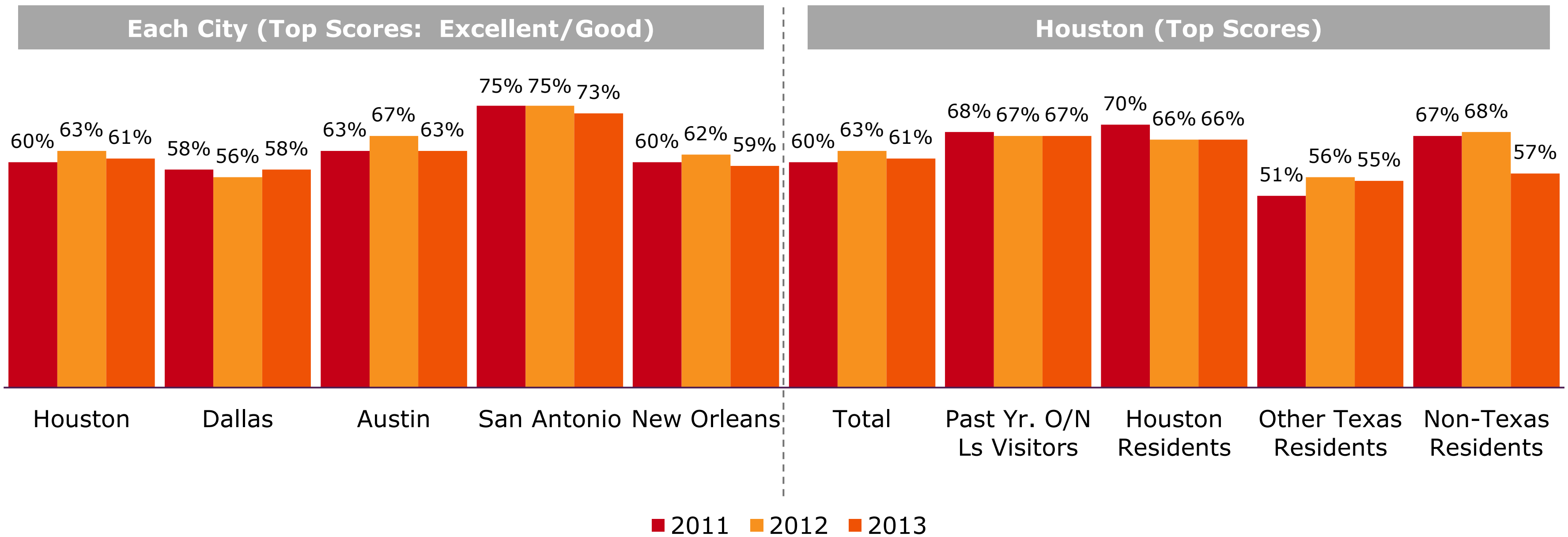
- San Antonio takes the lead in the value for the money image
- Houston, Dallas, Austin, and New Orleans all vie for second, but Dallas trails in share of very high (9/10) ratings
- Non-Houston Texans and non-Texans assign lower ratings to Houston than other segments.



Q6. Abridged: On a 10-point scale (10=excellent value; 1=terrible value) overall, how would you rate the value for the money of each city?

Value for the money - cities as destinations

Compared to last year, cities' *value for the money* image remains fairly stable, although Houston slips among non-Texans.

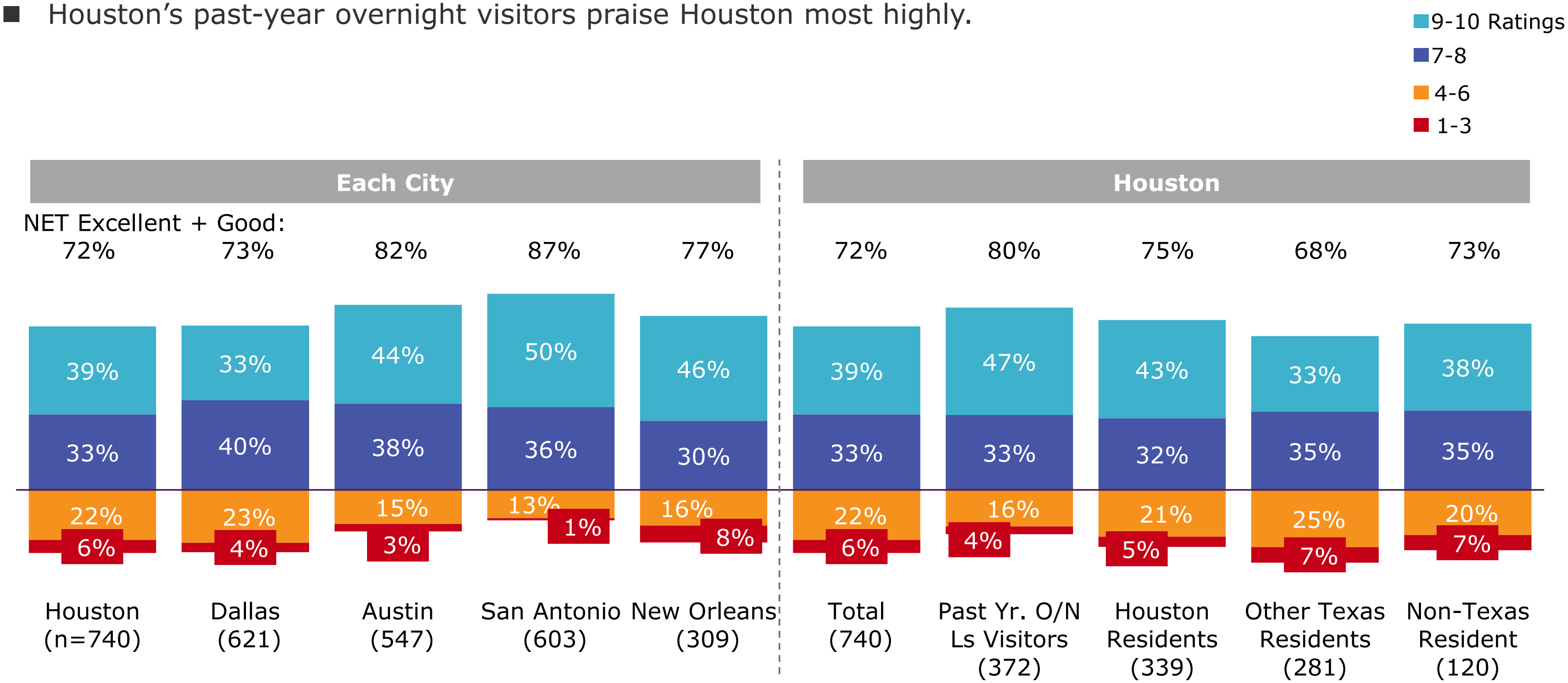


Q6. Abridged: On a 10-point scale (10=excellent value; 1=terrible value) overall, how would you rate the value for the money of each city?

Experience in each destination city

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

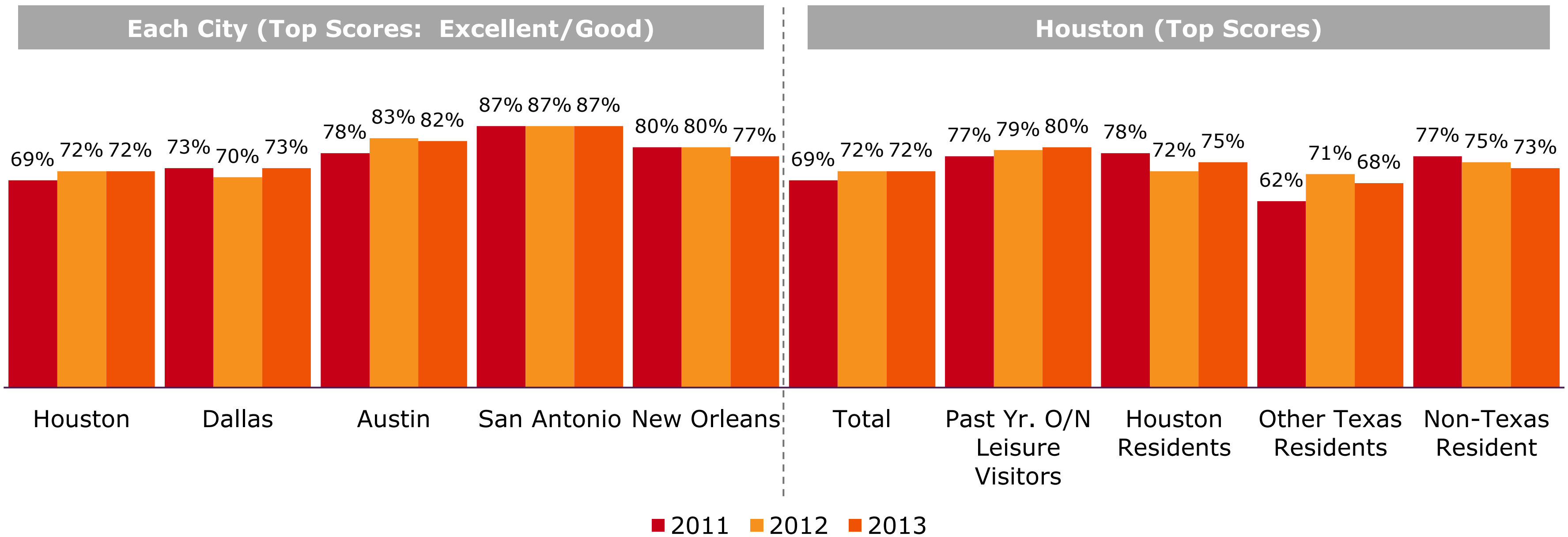
- Houston and Dallas trail other cities, but Houston gets more of the highest (9-10) ratings
- Houston's past-year overnight visitors praise Houston most highly.



Q7. Abridged: On a 10-point scale (10=excellent value; 1=terrible value) overall, how would you rate the experience you had in each city?

Experience in each destination city

The *overall experience* in Houston steadily climbs among past year overnight Houston visitors and slips among non-Texans.

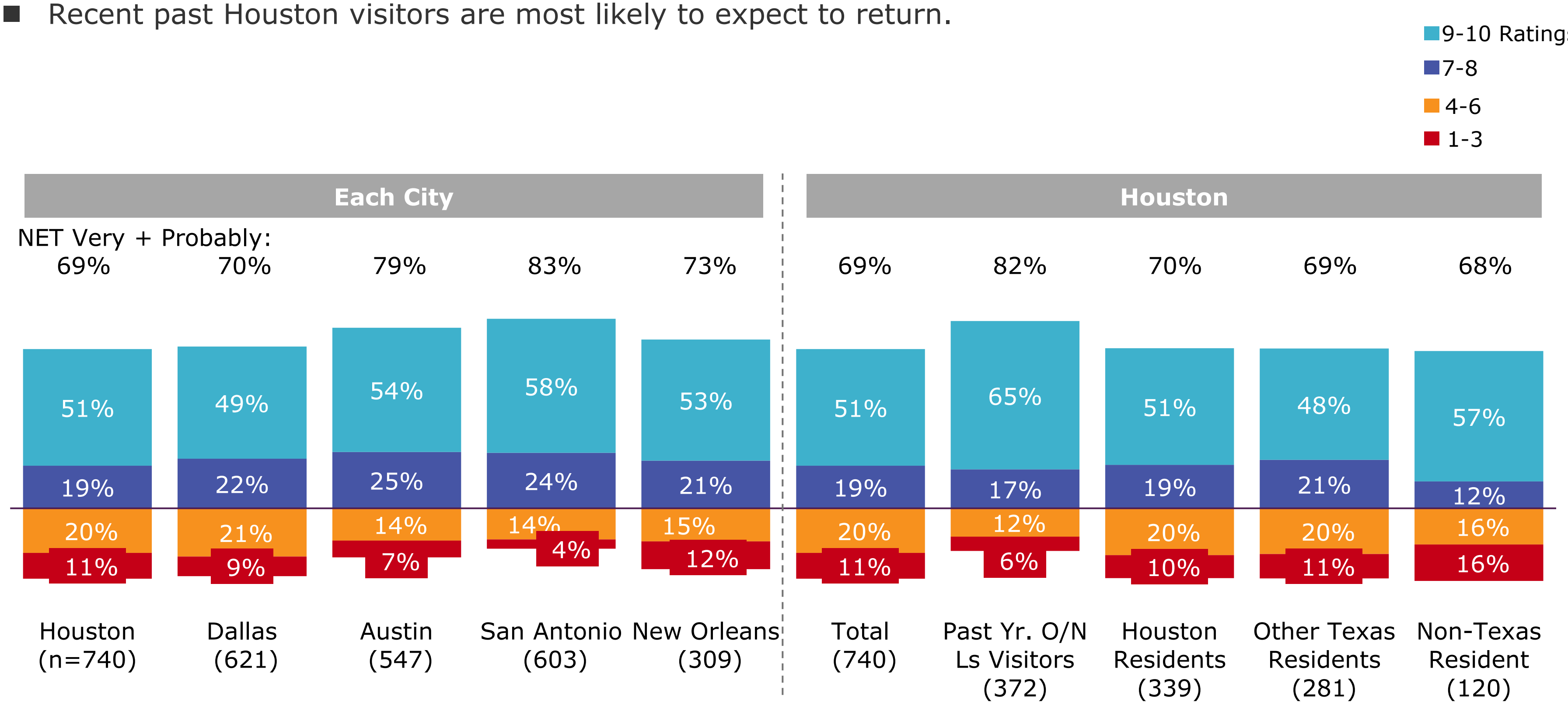


Q7. Abridged: On a 10-point scale (10=excellent value; 1=terrible value) overall, how would you rate the experience you had in each city?

Likely to return to destination city

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

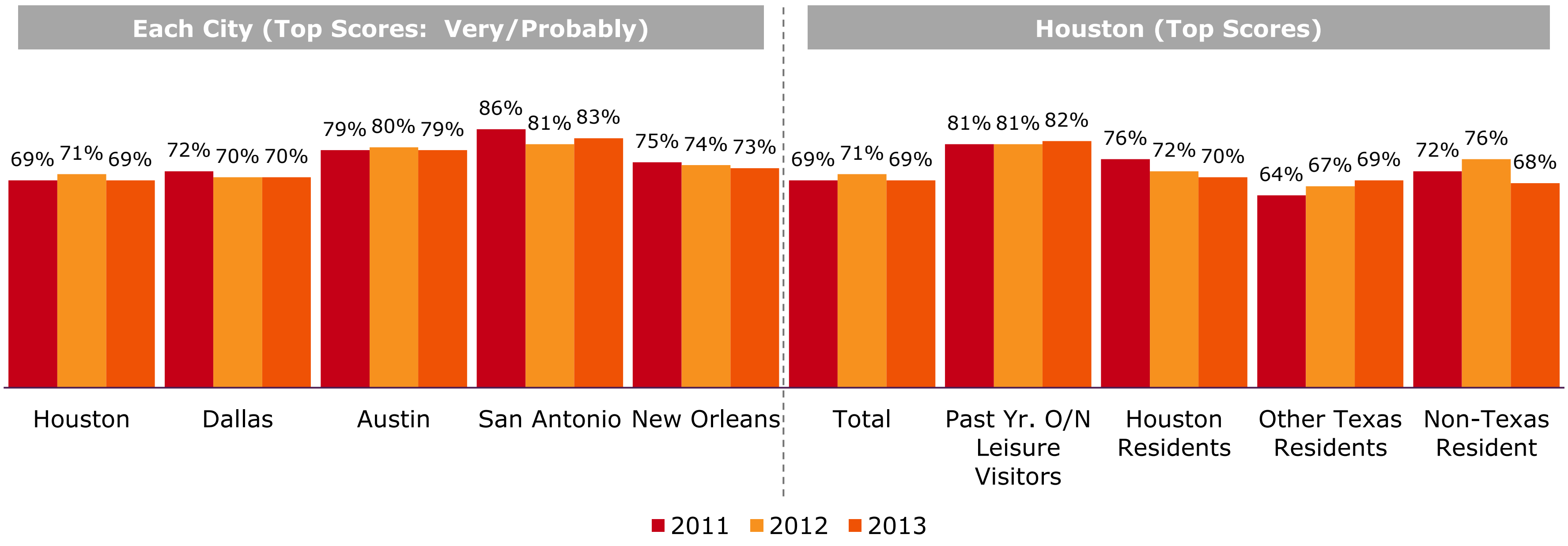
- San Antonio and Austin visitors have the highest expectations to return
- Houston closely competes with Dallas and New Orleans
- Recent past Houston visitors are most likely to expect to return.



Q8. Abridged: On a 10-point scale (10=very likely; 1=not at all likely), please indicate how likely you are to return to each city for an overnight, leisure trip?

Likely to return to destination city

Compared to last year, most cities lure about the same level of expected repeaters, although Houston residents post a steady decline in intent to visit Houston while other Texans' expectations rise.

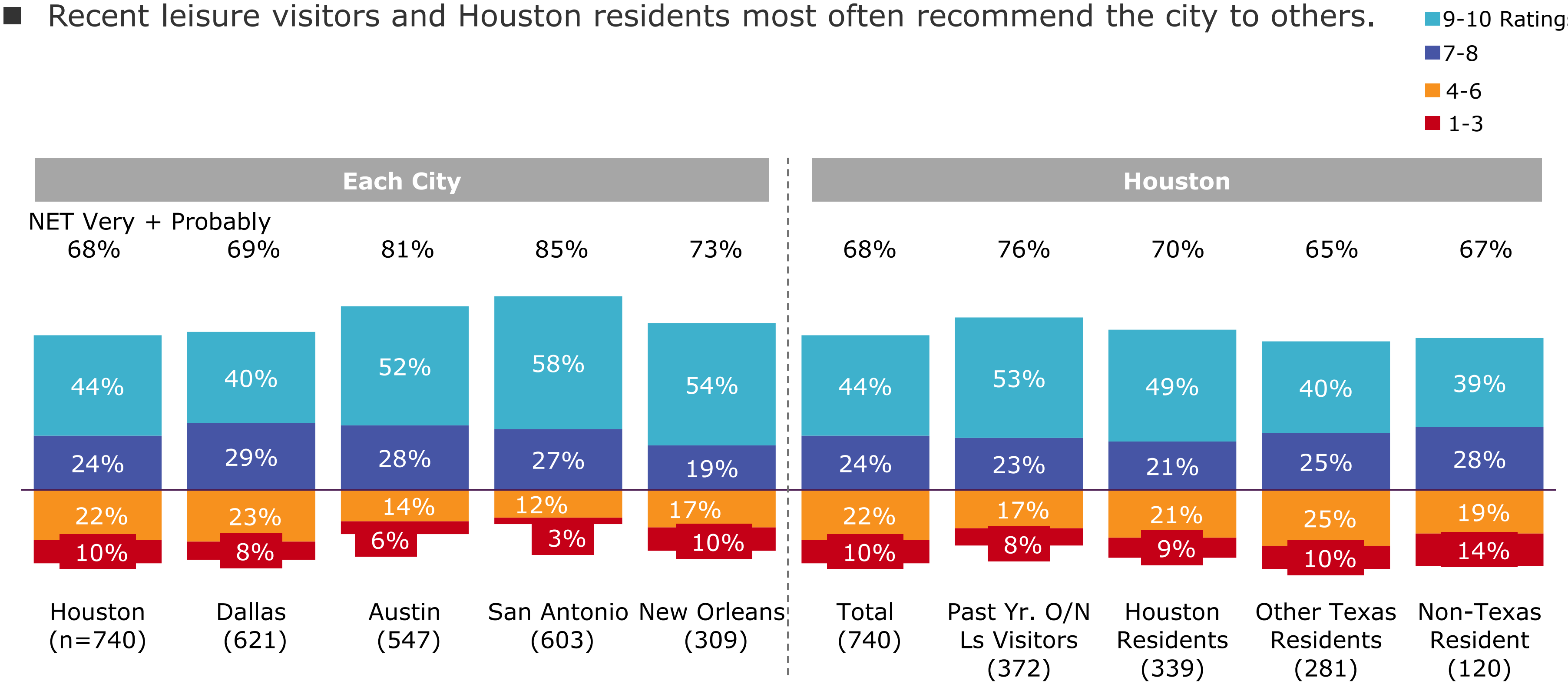


Q8. Abridged: On a 10-point scale (10=very likely; 1=not at all likely), please indicate how likely you are to return to each city for an overnight, leisure trip?

Likely to recommend city as destination

By city:

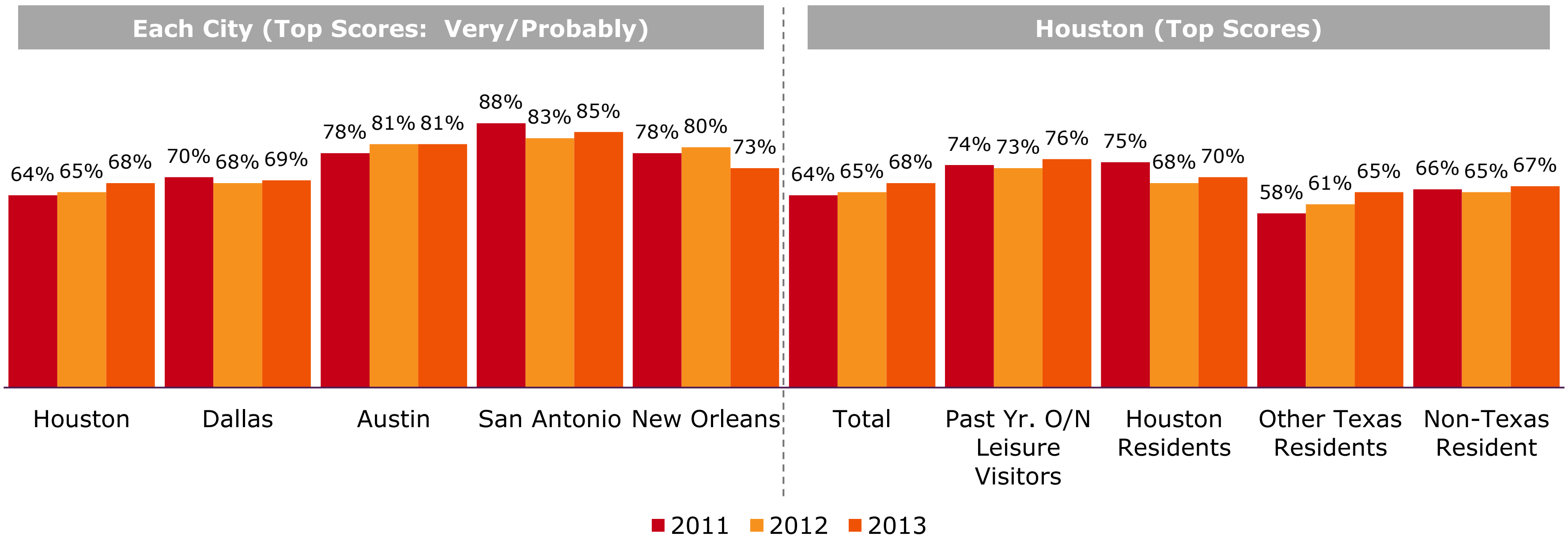
- Visitors to San Antonio and Austin would be most likely to recommend the city to friends/family
- Houston ranks behind all competitors, but almost ties Dallas
- Recent leisure visitors and Houston residents most often recommend the city to others.



Q9. Abridged: On a 10-point scale (10=very likely; 1=not at all likely), please indicate how likely you are to recommend traveling to each city to friends/family.

Likely to recommend city as destination

Recommendations hover near prior year levels, with a small, but steady improvement for Houston; non-Houston Texas residents note steady gains.



Q9. Abridged: On a 10-point scale (10=very likely; 1=not at all likely), please indicate how likely you are to recommend traveling to each city to friends/family.

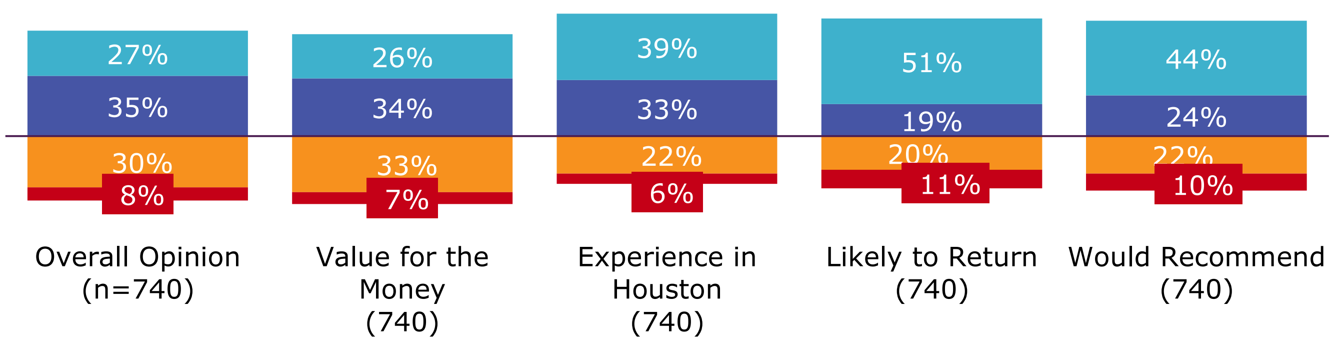
Summary of opinions/ratings about Houston

Over half (61%- 72%) of Houston visitors assign high ratings on each measure:

- Houston consistently exceeds last year with the same measure, *positive experience* in Houston (72%), leading all others
- Houston maintains the improvement in *overall opinion* noted last year.

Houston (Visited in Past 5 Years)

NET Top Four Ratings:					
2013	62%	61%	72%	69%	68%
2012	61%	63%	72%	71%	65%
2011	49%	60%	69%	69%	64%
NET Top Two Ratings:					
2013	27%	26%	39%	51%	44%
2012	24%	25%	36%	51%	40%
2011	17%	22%	35%	47%	40%

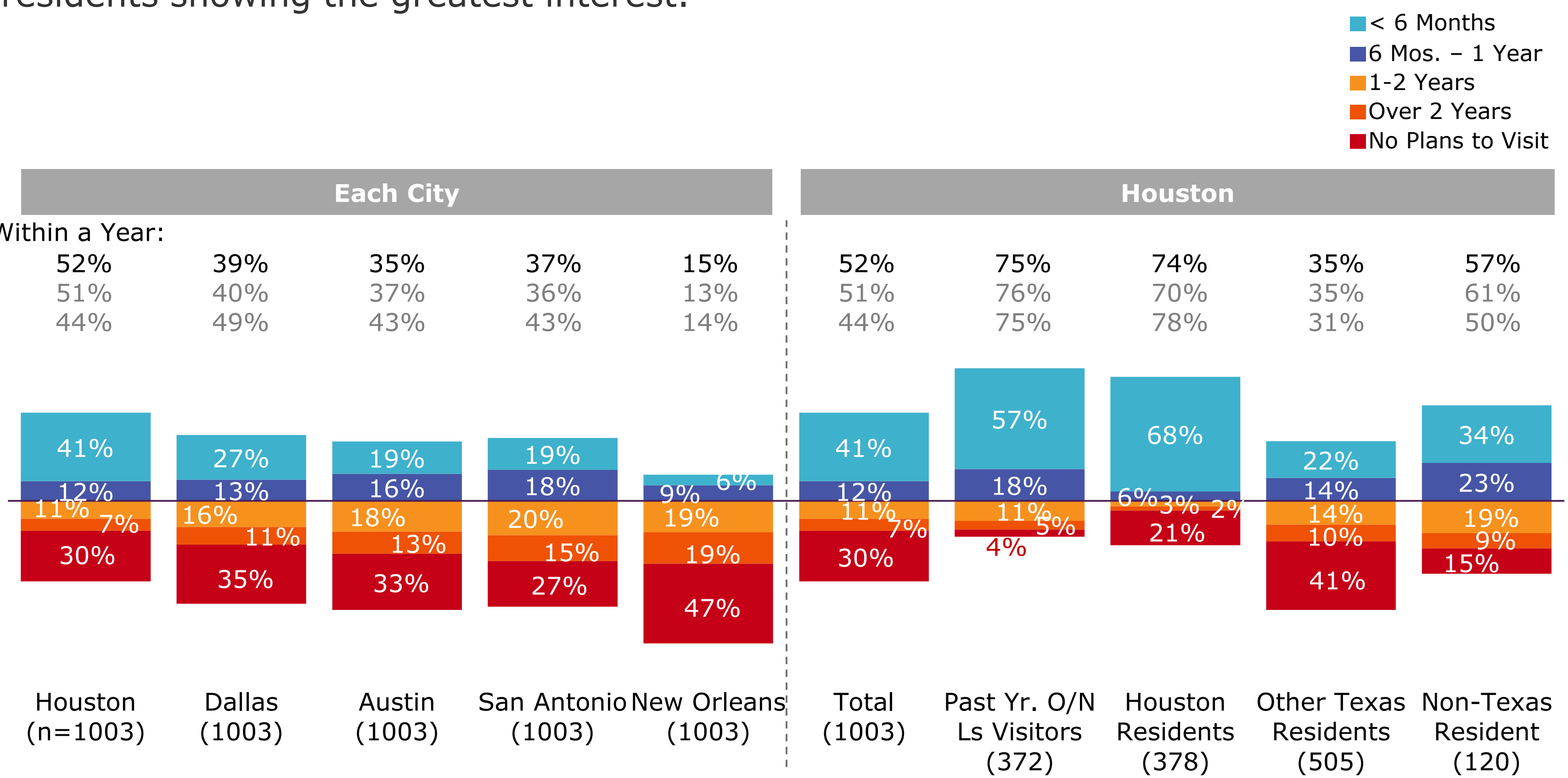


Q4. Now, we would like you to rate each of the listed cities, whether or not you live there or have visited them, on a 10-point scale (10=perfect; 1=terrible). Taking into account everything you look for in a leisure destination, how would you rate each city?
Q6. Abridged: On a 10-point scale (10=excellent; 1=terrible) overall, how would you rate the value for the money of each city?
Q7. Abridged: On a 10-point scale (10=excellent; 1=terrible) overall, how would you rate the experience you had in each city?
Q8. Abridged: On a 10-point scale (10=very; 1=not at all), how likely you are to return to each city for an overnight, leisure trip?
Q9. Abridged: On a 10-point scale (10=very; 1=not at all), how likely you are to recommend traveling to each city to friends/family.

Next future visit to city

Houston maintains its lead over Dallas as a city to visit within the next year, with past visitors and residents showing the greatest interest.

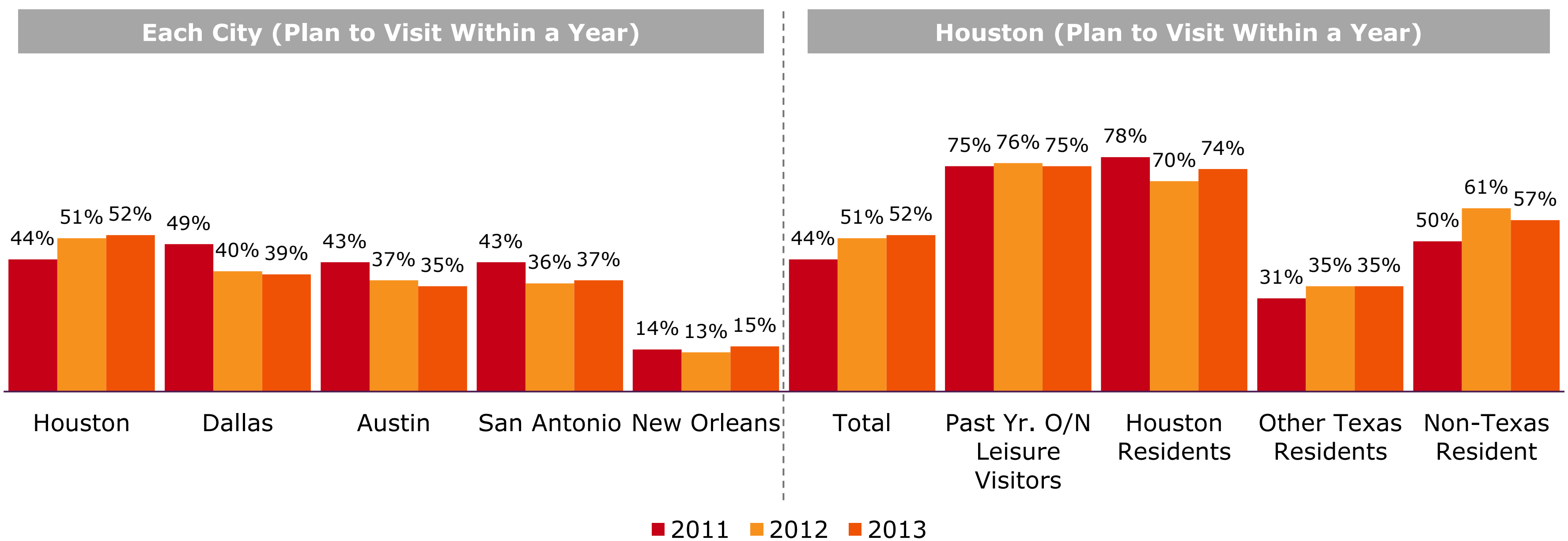
NET Within a Year:	Each City					Houston				
	Houston	Dallas	Austin	San Antonio	New Orleans	Total	Past Yr. O/N Ls Visitors	Houston Residents	Other Texas Residents	Non-Texas Resident
2013	52%	39%	35%	37%	15%	52%	75%	74%	35%	57%
2012	51%	40%	37%	36%	13%	51%	76%	70%	35%	61%
2011	44%	49%	43%	43%	14%	44%	75%	78%	31%	50%



Q10. Please indicate the next time you plan to visit each of the following cities?

Next future visit to city

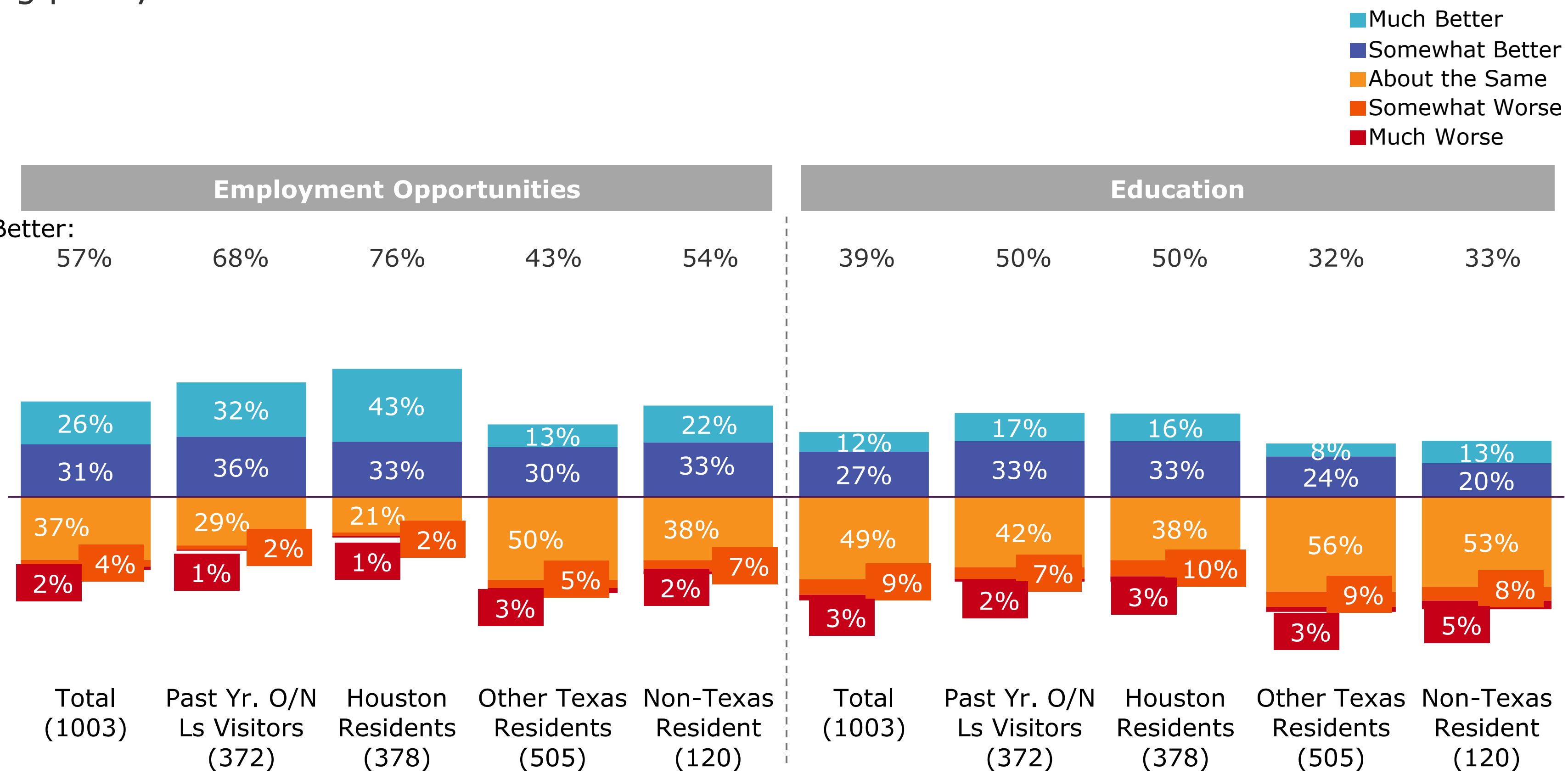
Over the past three waves of the study, only Houston posts a continuous gain in intent to visit within a year.



Q10. Please indicate the next time you plan to visit each of the following cities?

Houston vs. other cities

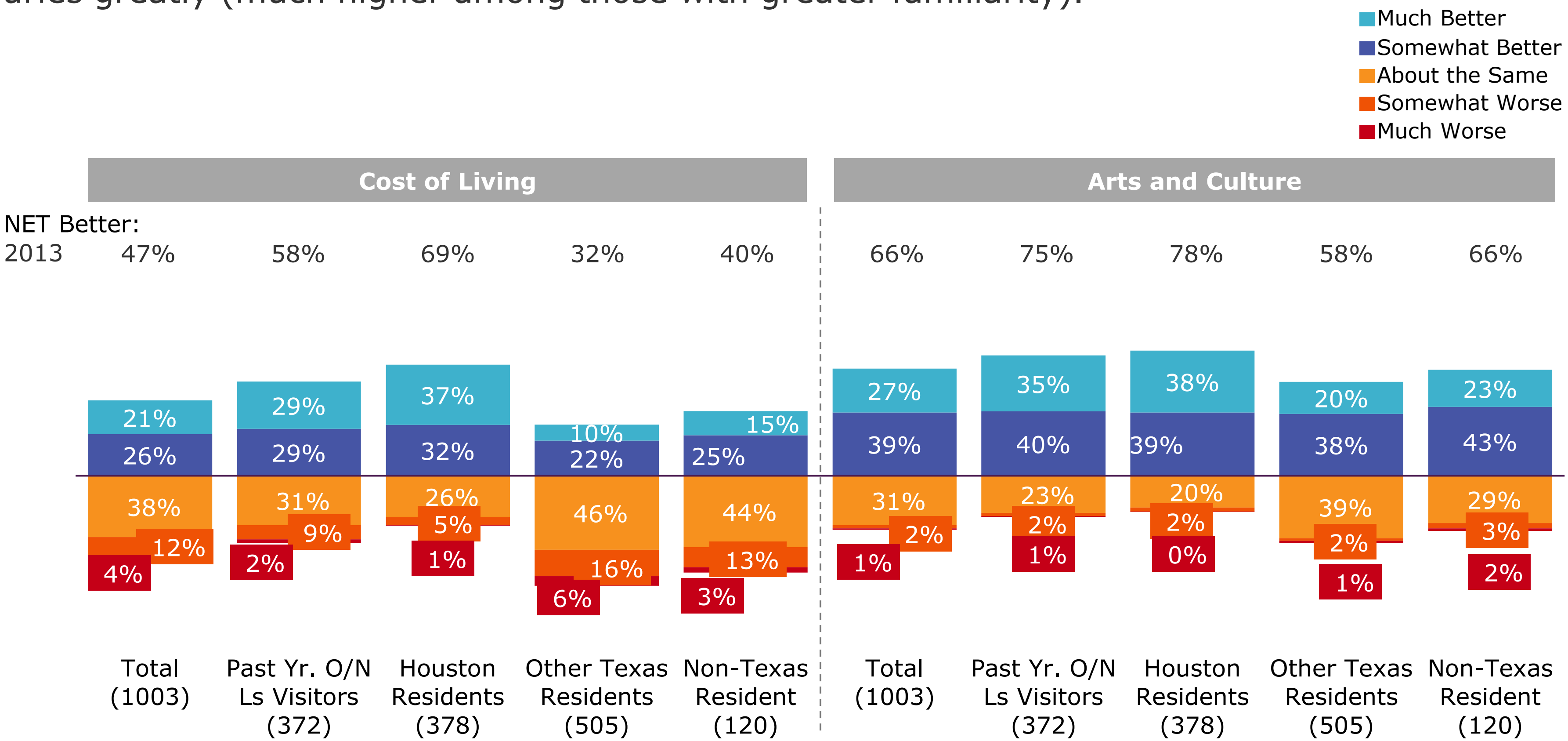
Except for non-Houston Texas residents, more than half view Houston as a place with better *employment opportunities*. However, *education* places nearer to average, with higher ratings among past year visitors and Houston residents.



Q41. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

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).

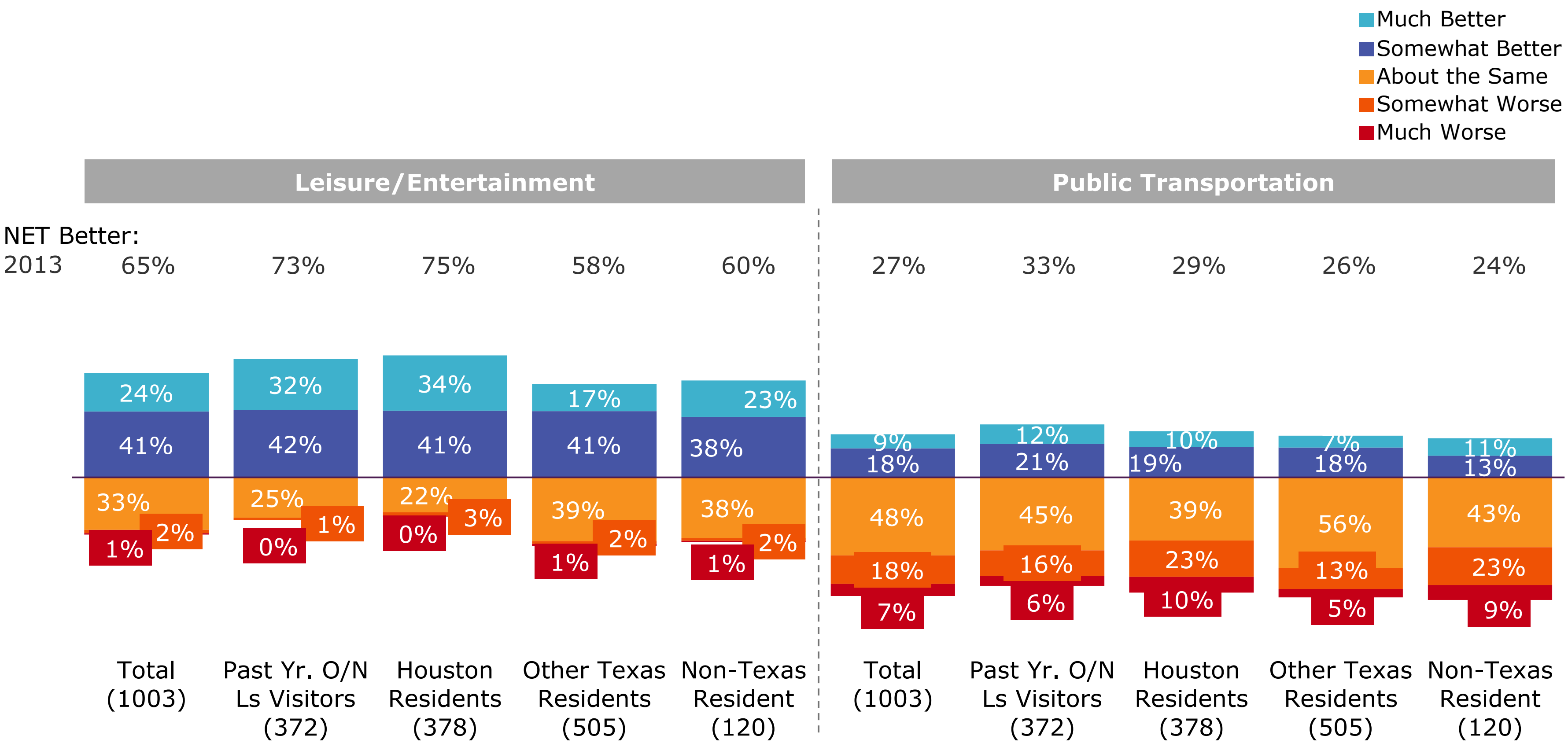


Q41. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

TNS

Houston vs. other cities

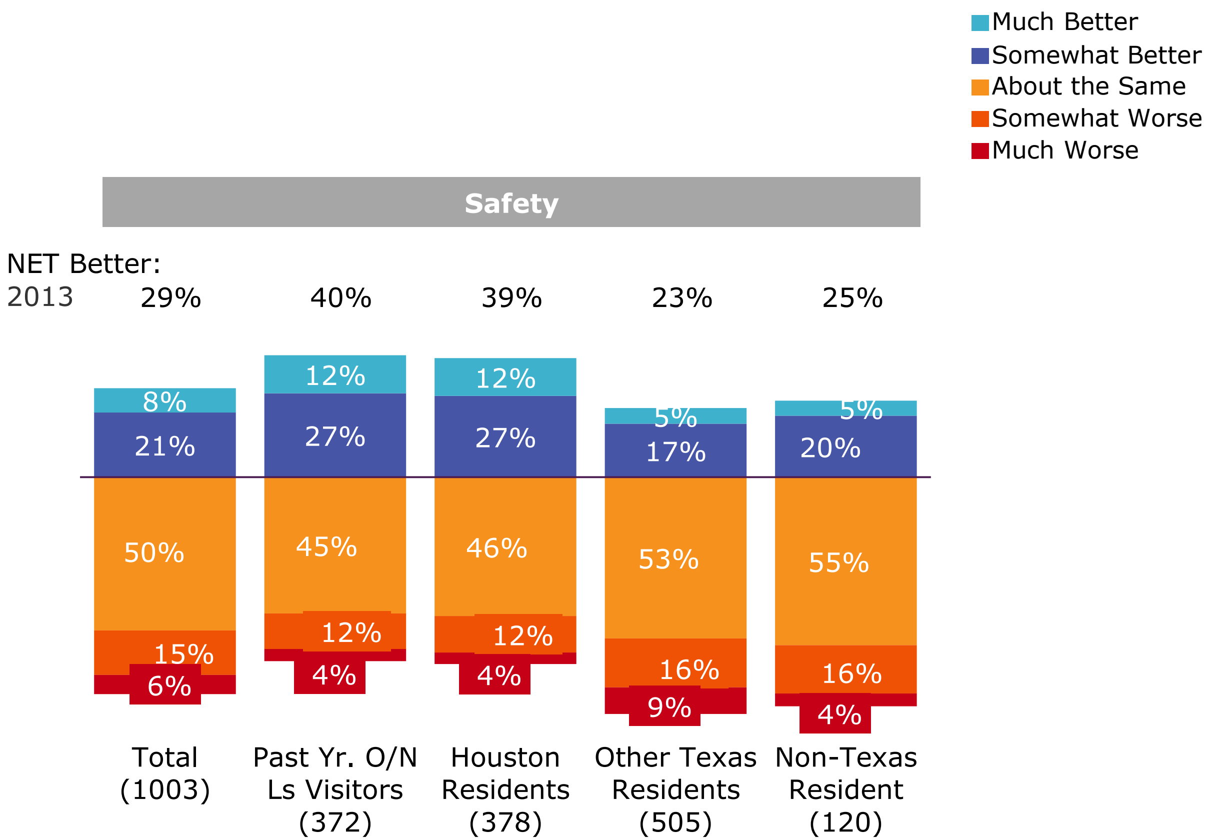
Similar to arts and culture, Houston receives very high marks for *leisure and entertainment;* but most travelers view its *public transportation* as not competitive to other cities.



Q41. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

Houston vs. other cities

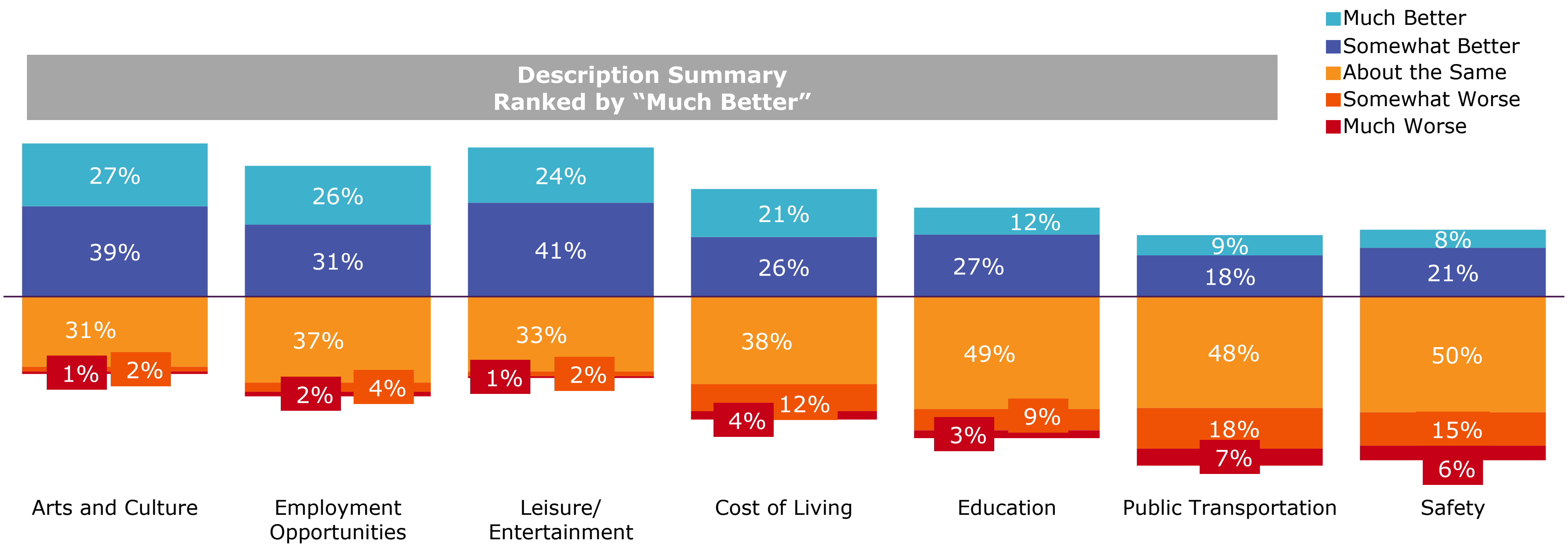
Safety places near average.



Q41. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

Houston vs. other cities: Summary Table

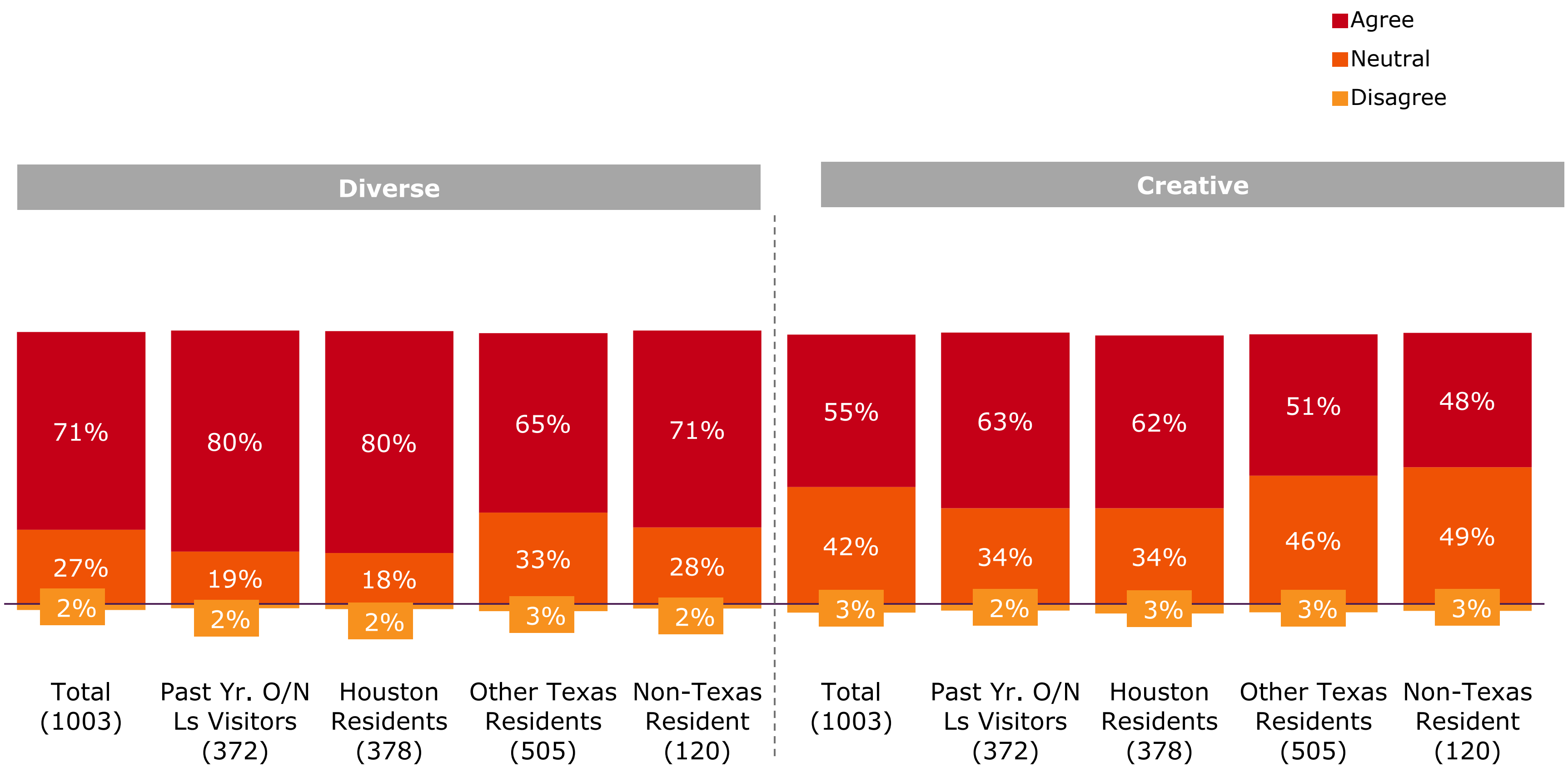
Houston receives its highest praise, compared to other cities, for *Arts/Culture, Leisure/ Entertainment,* and *Employment Opportunities*.



Q41. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

Houston descriptions

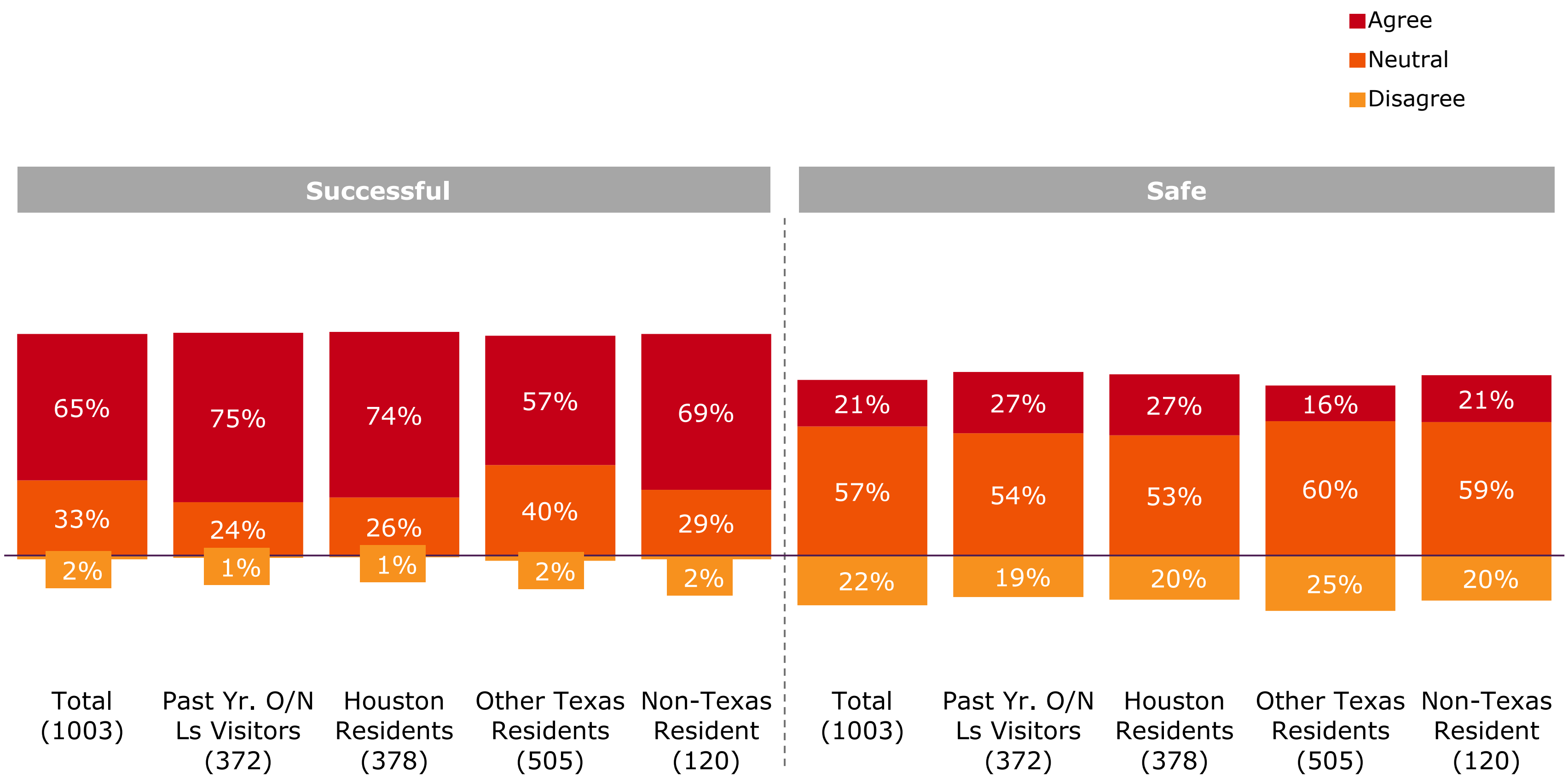
The majority agree that Houston is *diverse* and *creative*; few disagree.



Q42. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

Houston descriptions

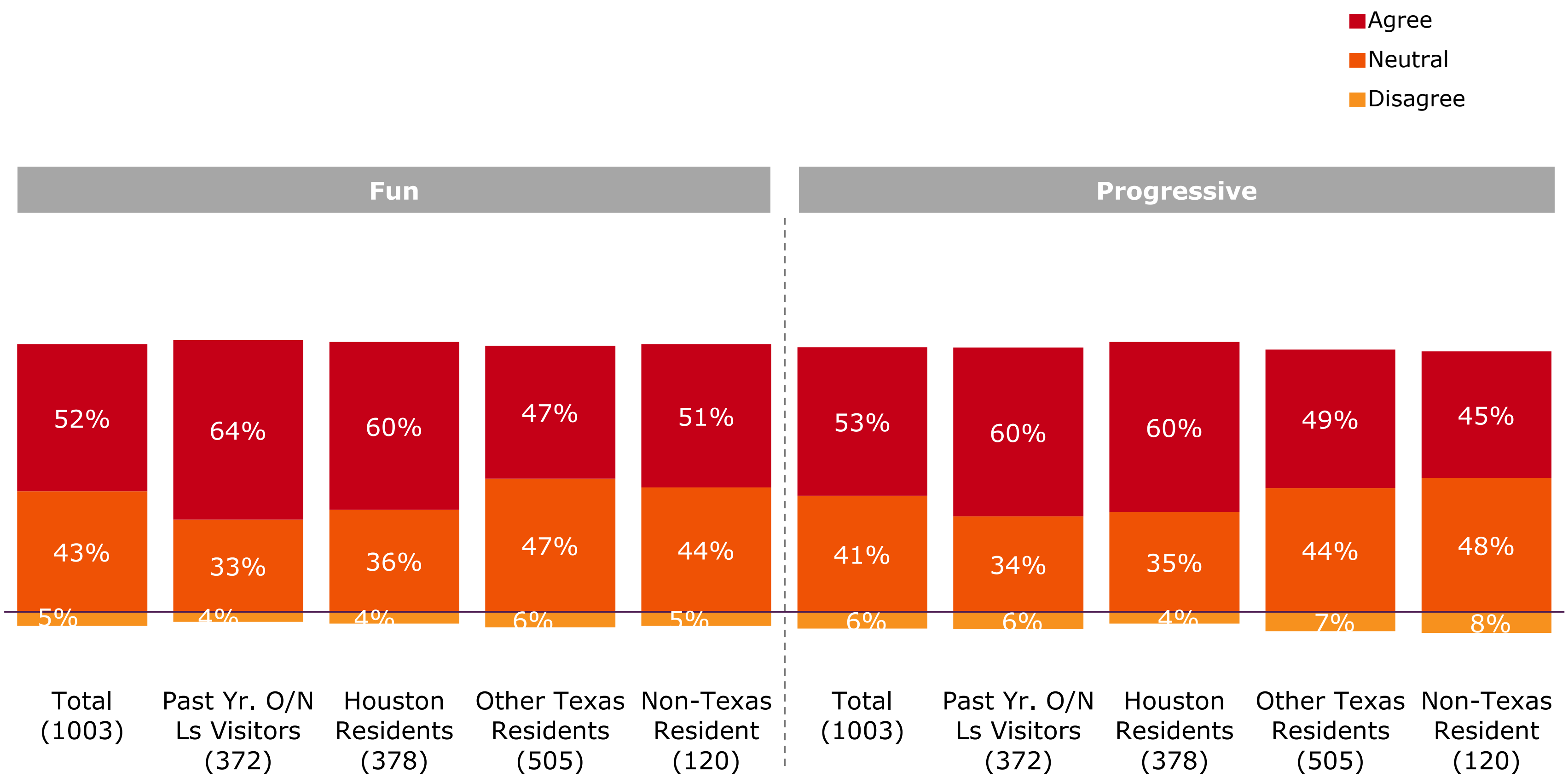
Most also view Houston as *successful,* but *safety* lags most other measures.



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

Houston descriptions

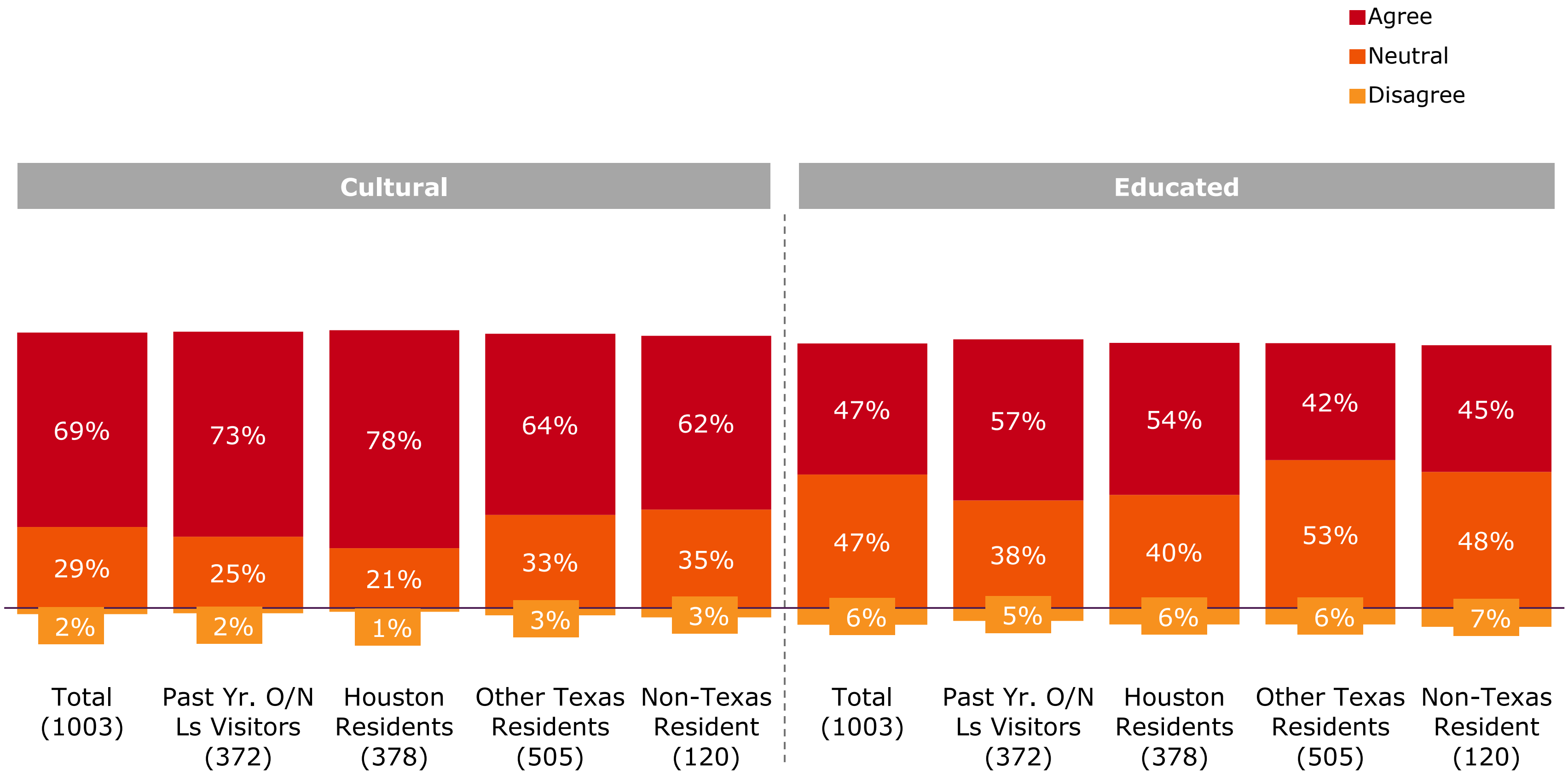
Travelers generally deem Houston as *fun* and *progressive*.



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

Houston descriptions

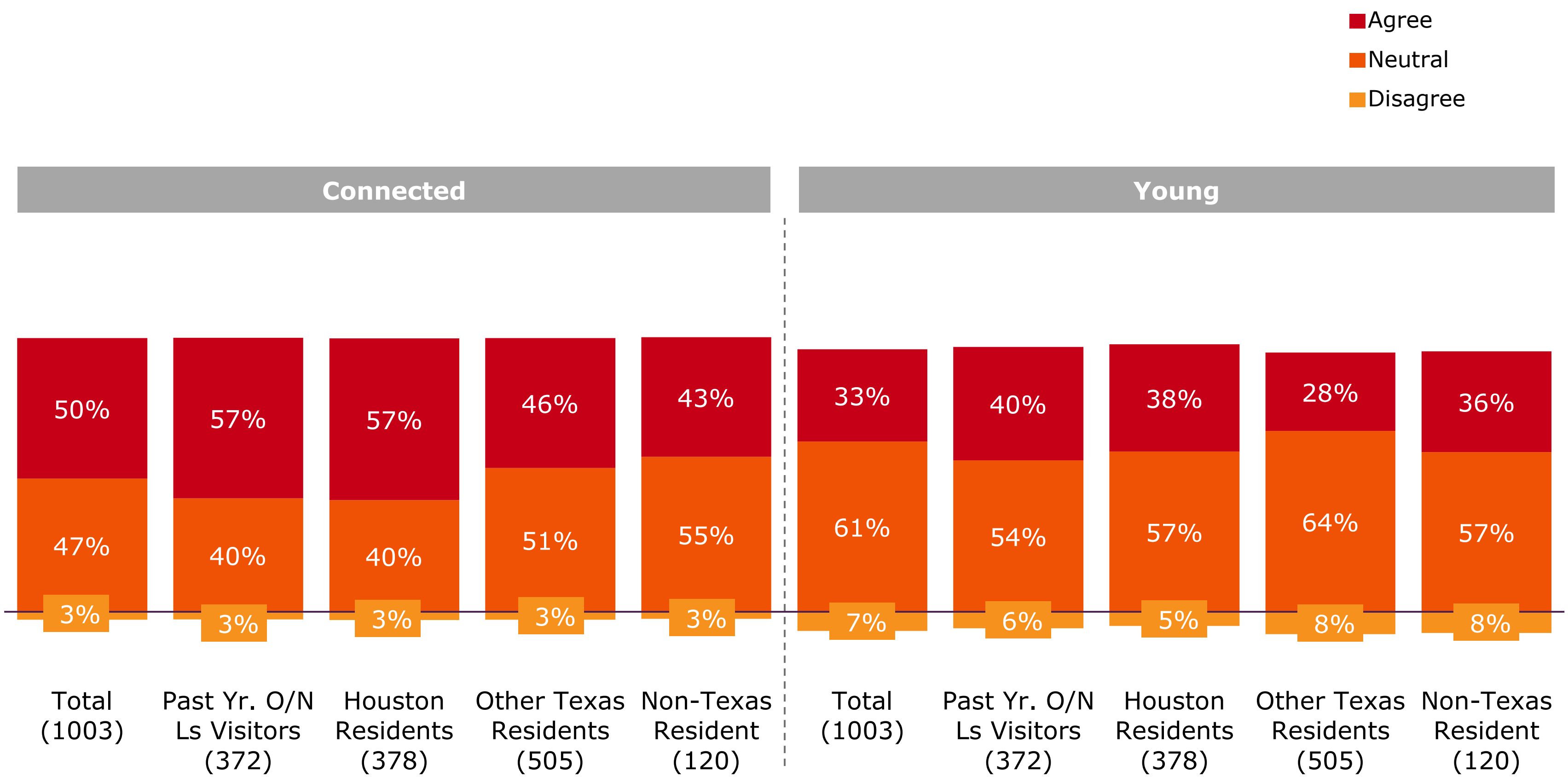
Particularly strong as a *cultural* center, most think of it as *educated* as well.



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

Houston descriptions

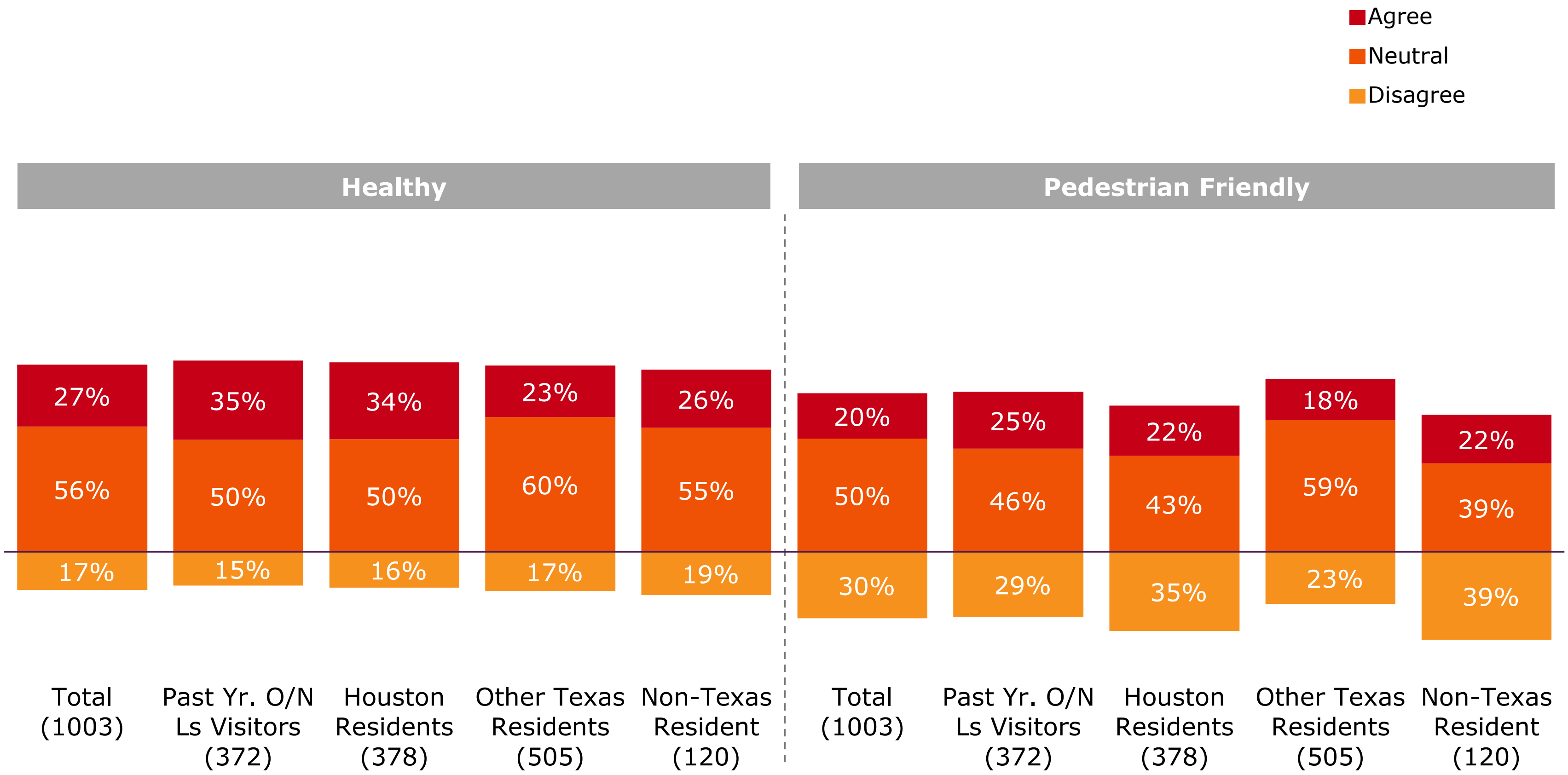
Half of those contacted perceive Houston as *connected,* but somewhat fewer consider it *young*.



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

Houston descriptions

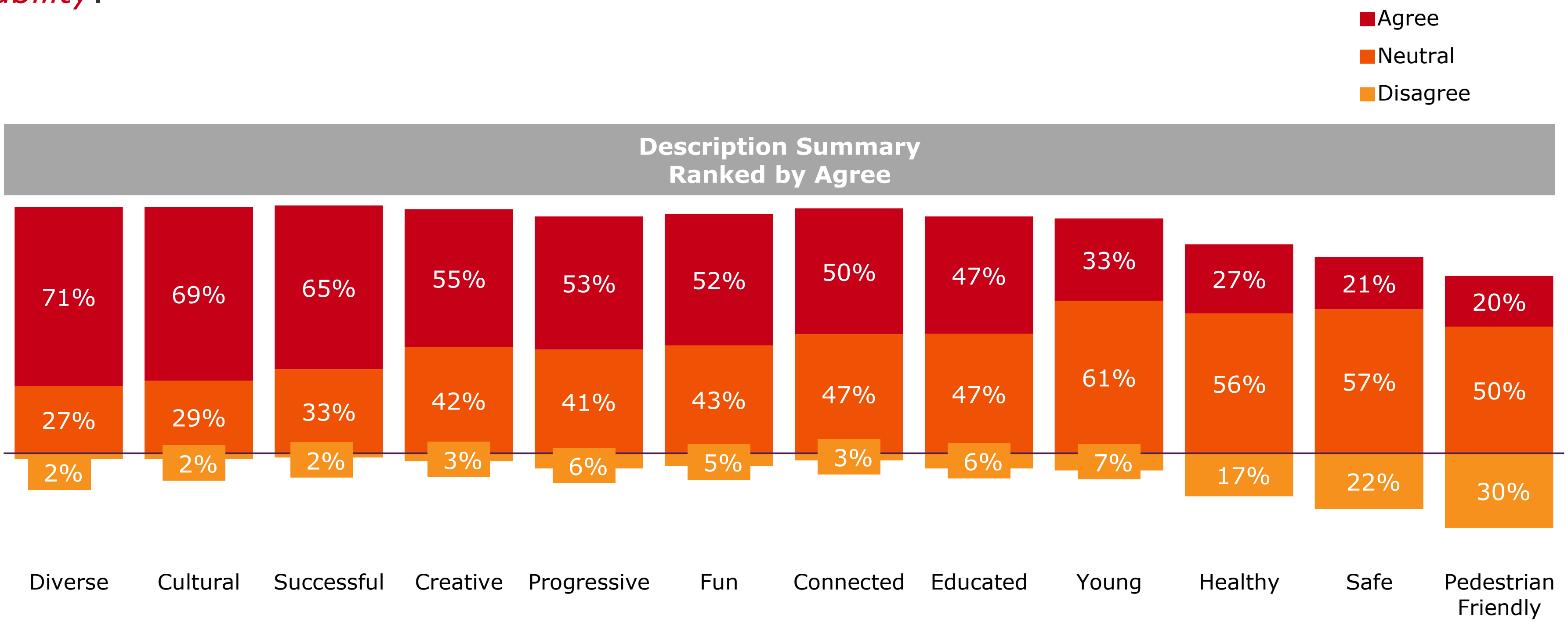
Viewed as about average for *health*, Houston lags other attributes as a *pedestrian-friendly* place.



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. Abridged: Please rate how Houston compares to other cities in the US on the following characteristics.

5

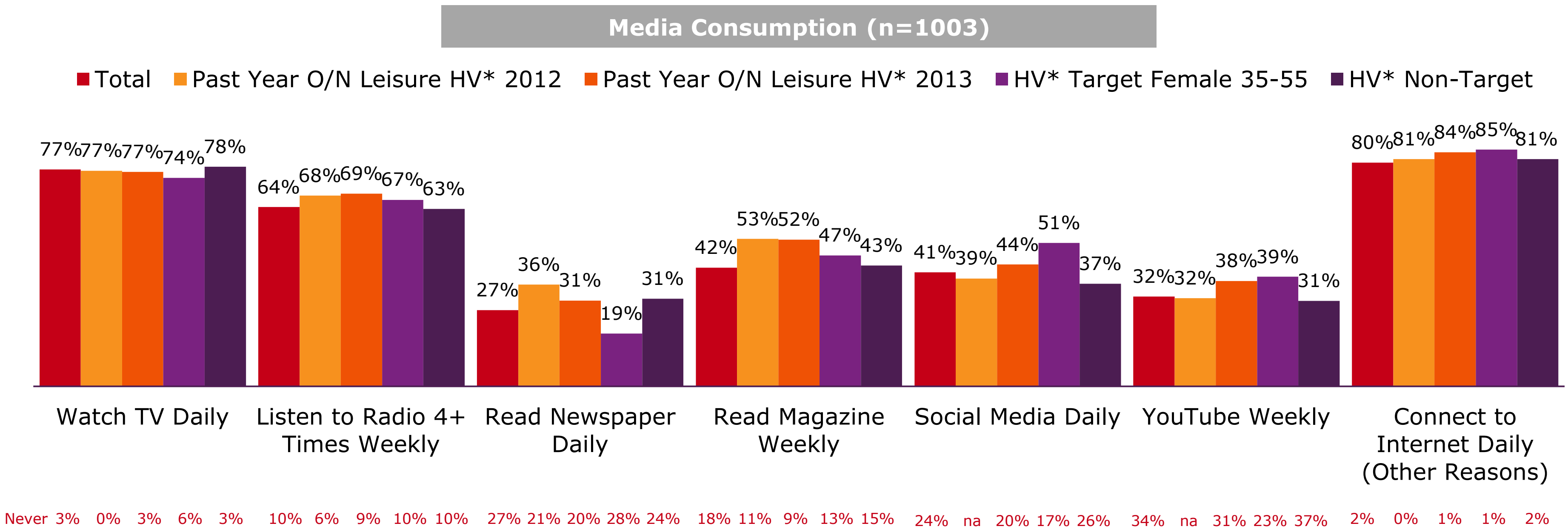
Appendix IIb. Media Choices From Follow-up Survey

TNS

Media used

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

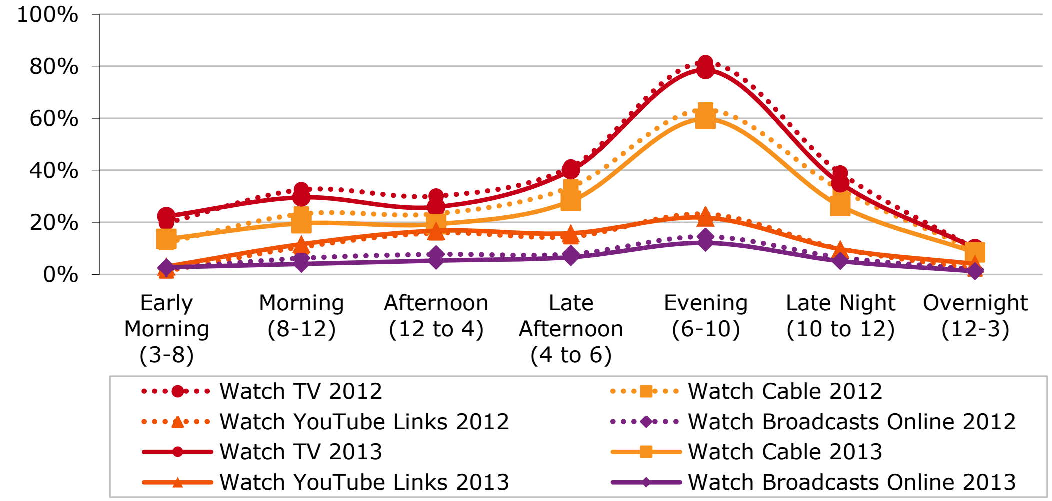
- TV/Internet: Almost everyone watches television (97%) and connects to the Internet (98%), most daily
- Radio: Two-thirds (64%) listen to the radio at least 4 times per week, likely many listen while driving
- Newspapers: Few (27%) read a daily newspaper; even fewer among the target (19%) group
- Magazines: Not designed for daily use, fewer than half read magazines weekly, but the proportion rises among past year overnight Houston leisure visitors (52%)
- Social Media: Two in five use social media, more among those in the Target group (51%)
- YouTube: Few watch it daily (8%, not shown), but most watch it occasionally (66%; 77% Target).



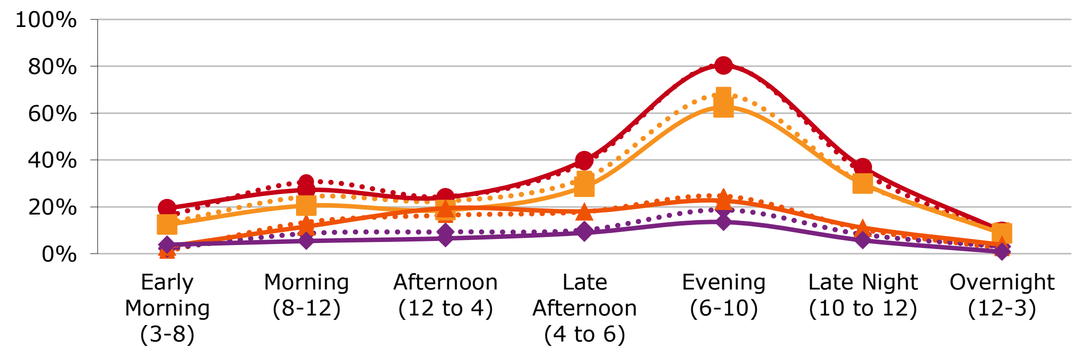
HV* = Houston Visitor
Q38. How often would you say you do each of these activities?

Timing for watching media

Total



Past Year Houston Overnight Leisure Visitor



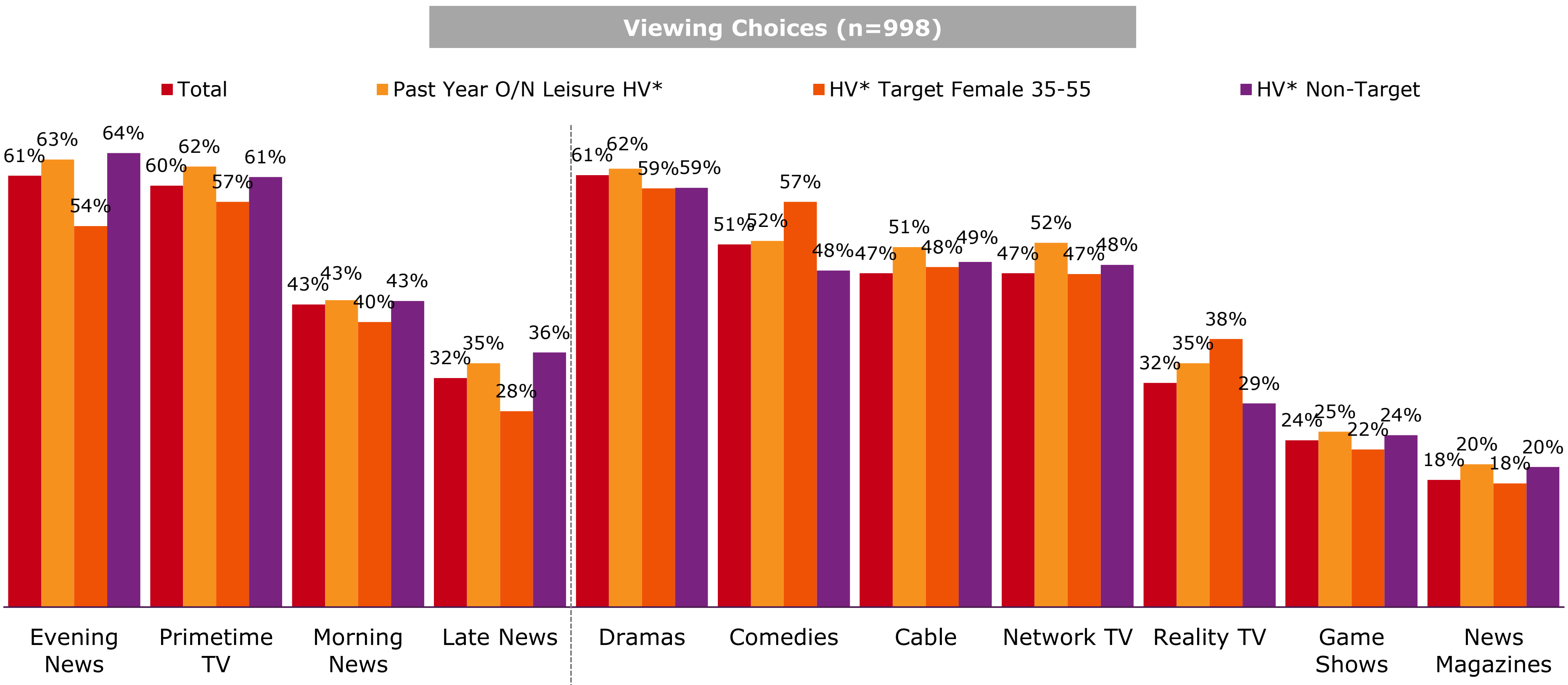
Viewing Habits

- People more likely watch TV and online media in the evening (from 6 – 10 pm)
- Television (and Cable) accounts for most viewing choices
- About one in four (22% total; 23% past year Houston overnight leisure visitor) watches YouTube in the evening
- Watching Broadcasts online lags other choices.

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 comedies and reality TV than other groups; fewer of them prefer news programs than non-target visitors.



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

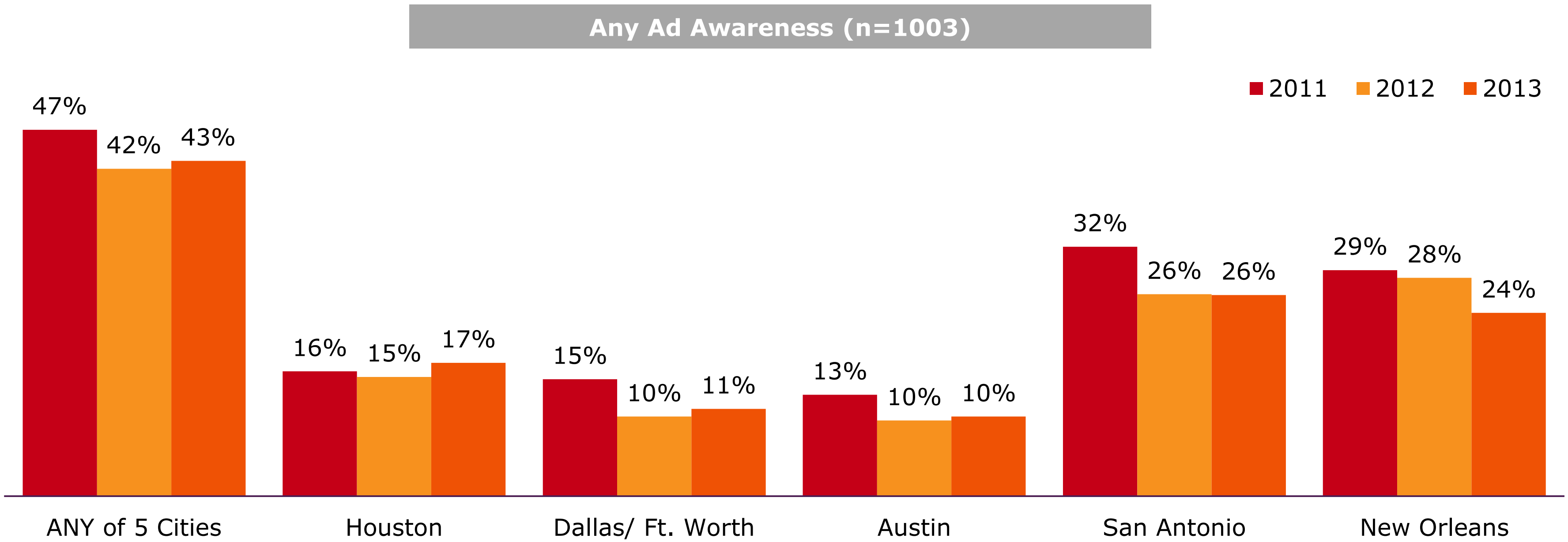
6

Appendix IIc. General Advertising Awareness From Follow-up Survey

City advertising awareness (unaided)

Advertising plays an important role in building interest in destination selection

- **All travelers:** Not quite half (43%) of all travelers recall advertising for at least one of the featured cities (Houston, Dallas/Ft. Worth, Austin, San Antonio, or New Orleans), with San Antonio (26%) and New Orleans (24%) generating, by far, the greatest recall
- Houston continues to rank third (17%).

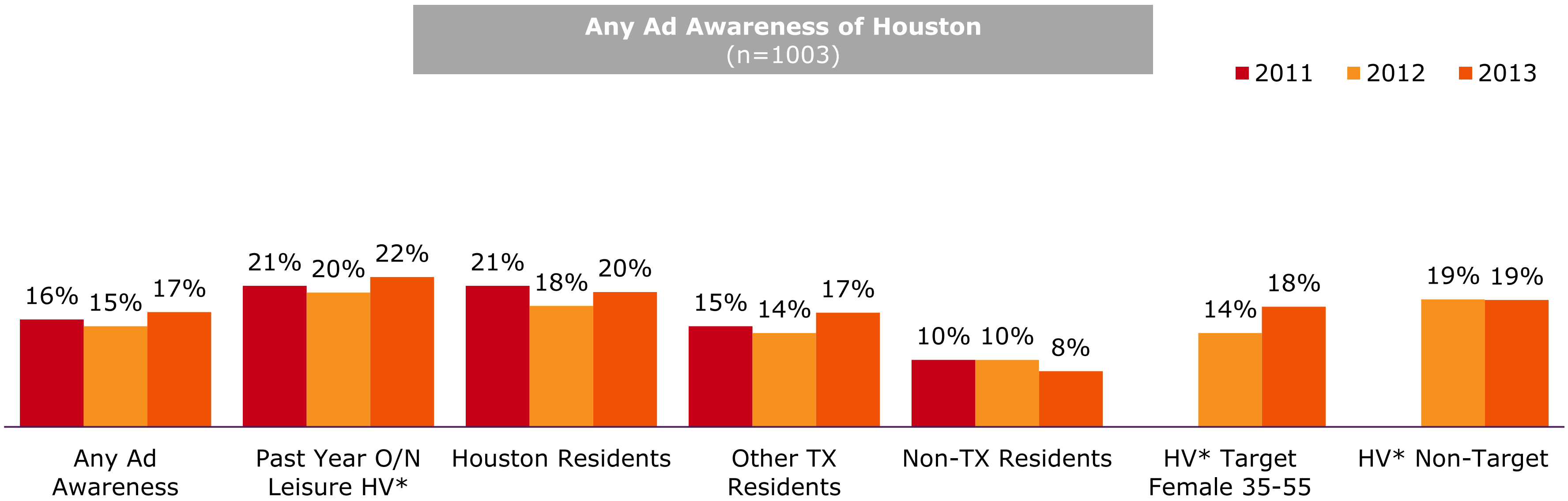


Note: in 2009 and 2010, Atlanta and Denver were included, so seven cities could have been noticed rather than just these five
Q11. In the past 3 months, for which of the following cities have you seen advertising?

Houston advertising awareness (unaided)

Advertising can directly influence who visits a destination and when:

- Past year overnight leisure visitors to Houston are more likely to recall advertising for Houston, demonstrating a relationship between advertising exposure and visitation
- The closer a traveler lives to Houston the more likely they are to be aware of advertising – Houston residents recall advertising more than twice as often as non-Texans
- More aware than last year, the Target group now notices advertising for Houston at about the same rate as the non-Target group.



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

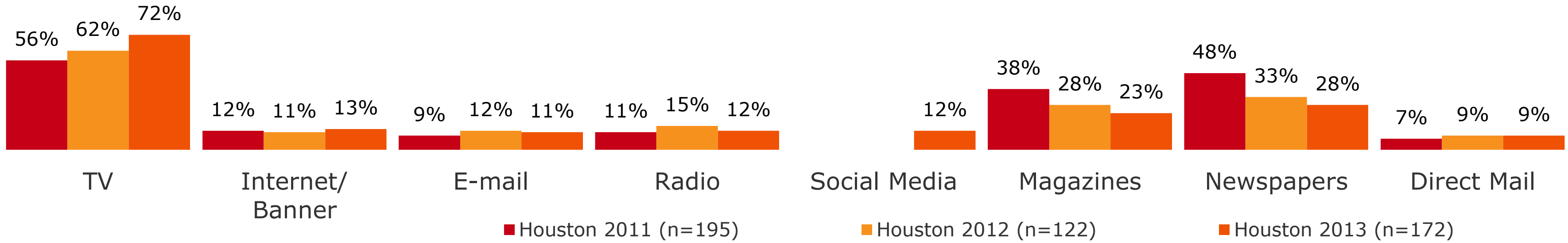
City advertising awareness by media - unaided

Advertising recall varies by medium:

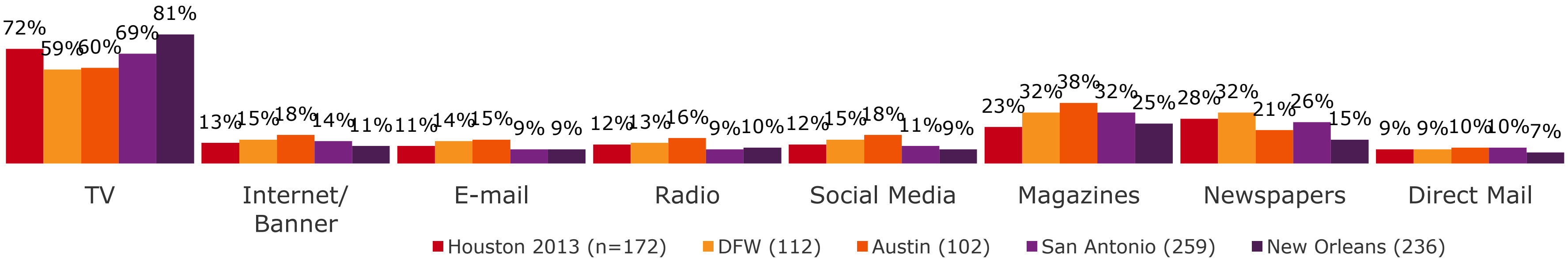
- Television leads as a source of ad awareness, especially for New Orleans
- Houston steadily gains in TV awareness while print declines (magazines and newspapers)
- Dallas/Ft. Worth gains more awareness from newspapers and Austin from magazines than other cities.

By Media

Time Periods



Cities

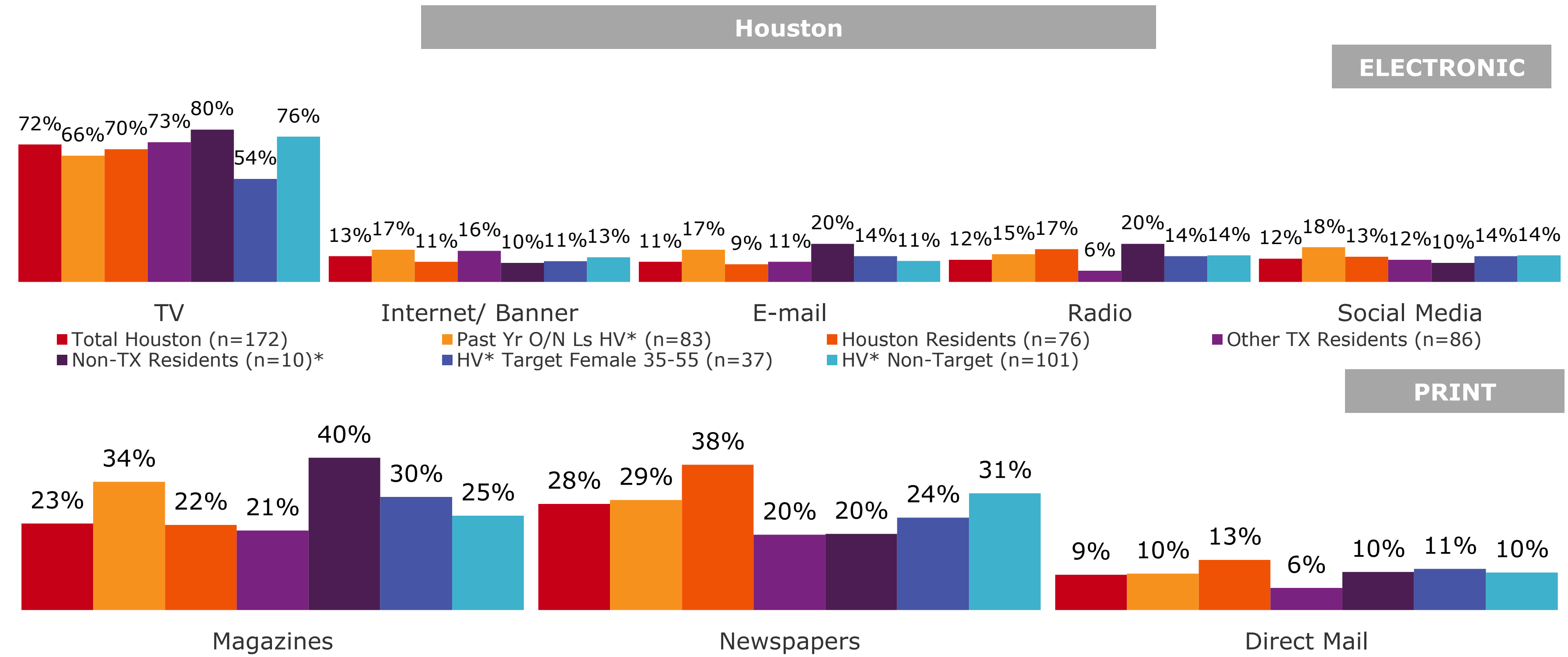


Q12. Abridged: For each of the cities, please indicate what type of media you recall seeing/hearing advertising.

Houston advertising awareness by media (unaided)

Advertising recall within groups stays fairly consistent with a few exceptions:

- **Electronic Media**: TV advertising generates high recall, although less among the Target group
- **Print Media**: Those most likely to recall Magazine ads include past visitors and non-Texas residents; newspapers (as expected) works best among Houston residents.



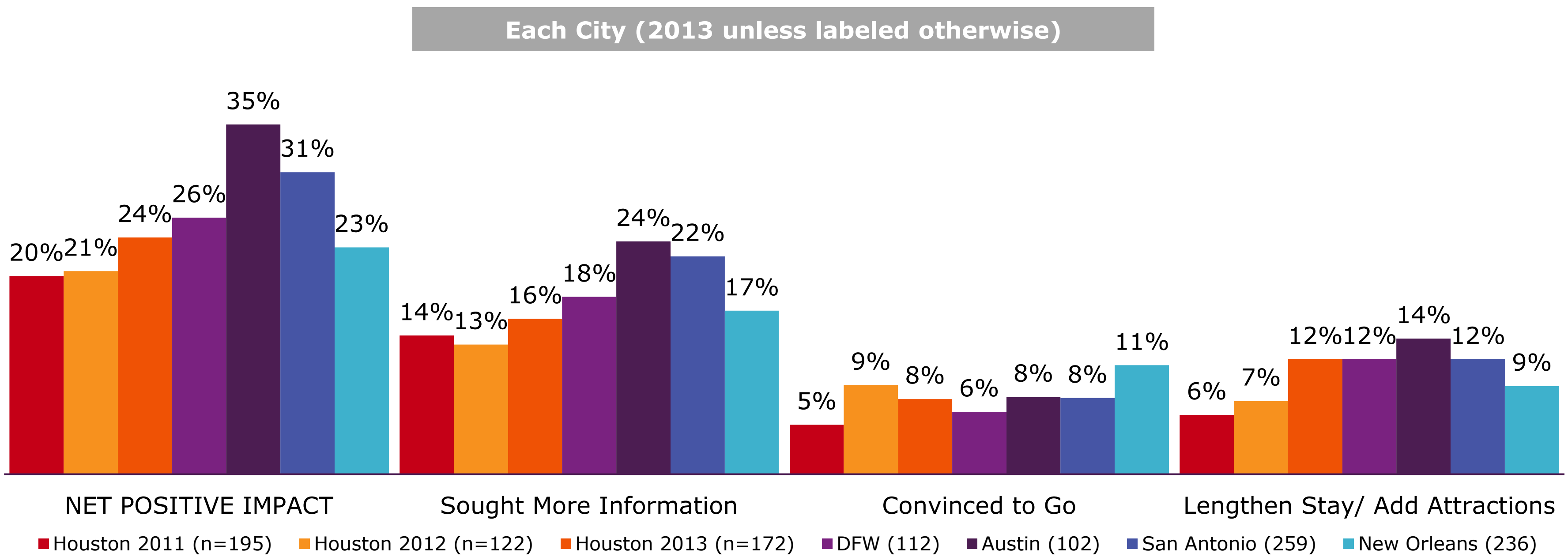
HV* = Houston Visitor

Q12. Abridged: For each of the cities, 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

Travelers may positively react to destination advertising in one of three listed ways: seek more information, book a trip, or stay longer/visit additional attractions:

- In overall positive impact, Austin (35%) leads while Houston, DFW, and New Orleans trail
- Houston steadily gains in building interest in longer stays and more attractions
- Ads do not affect everyone positively; potential visitors may decide not to visit (2% for Houston, not shown) or simply believe that ads do not influence them at all (74%, similar to other TNS studies).

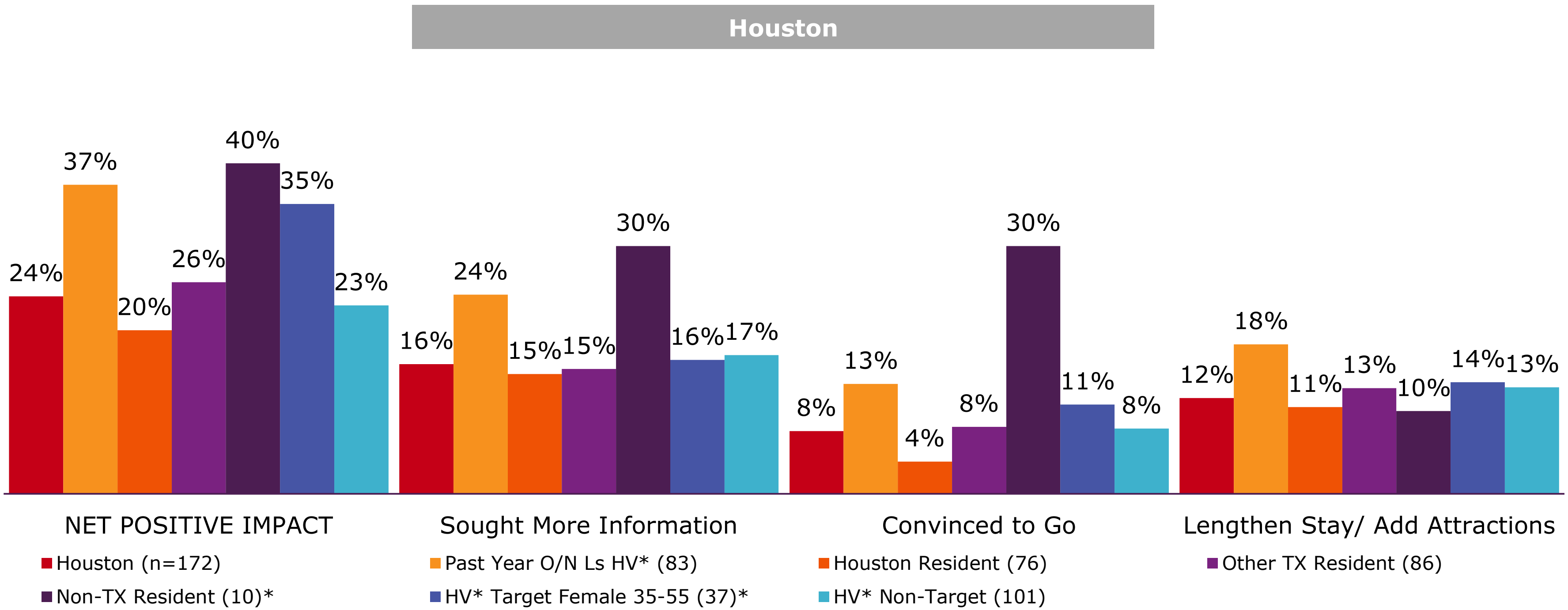


Q13. Abridged: How has the advertising you have seen affected your leisure travel plans?

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)



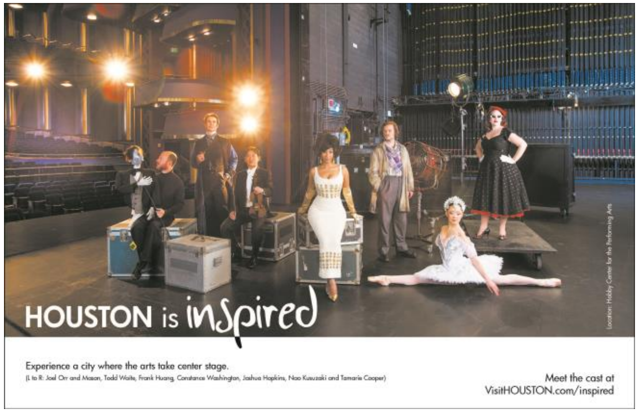
HV* = Houston Visitor
Q13. Abridged: How has the advertising you have seen affected your leisure travel plans?* Very small sample; treat as qualitative only

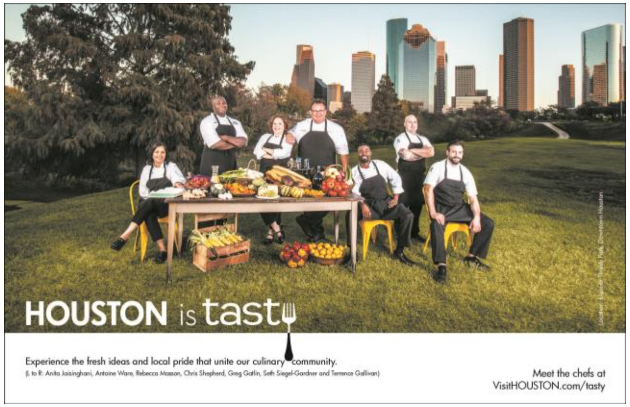
TNS

7

Appendix IId. Specific GHCVB Ad Awareness From Follow-up Survey

“Houston is” print ads



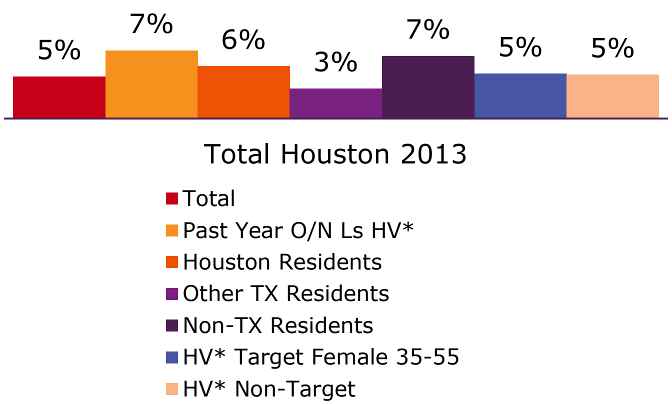


Houston print advertising: "Houston is" campaign

Fewer travelers recall and praise the "Houston is" print campaign than last year ("My Houston"), with about one in twenty remembering it.

"Houston is" Print Campaign (2013 unless labeled otherwise)

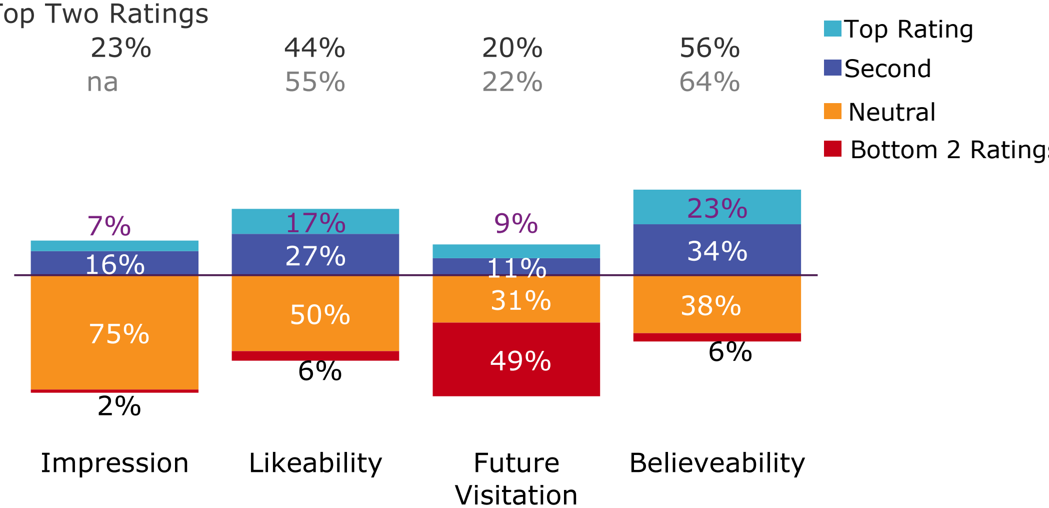
Awareness



Opinion Summary

NET Top Two Ratings

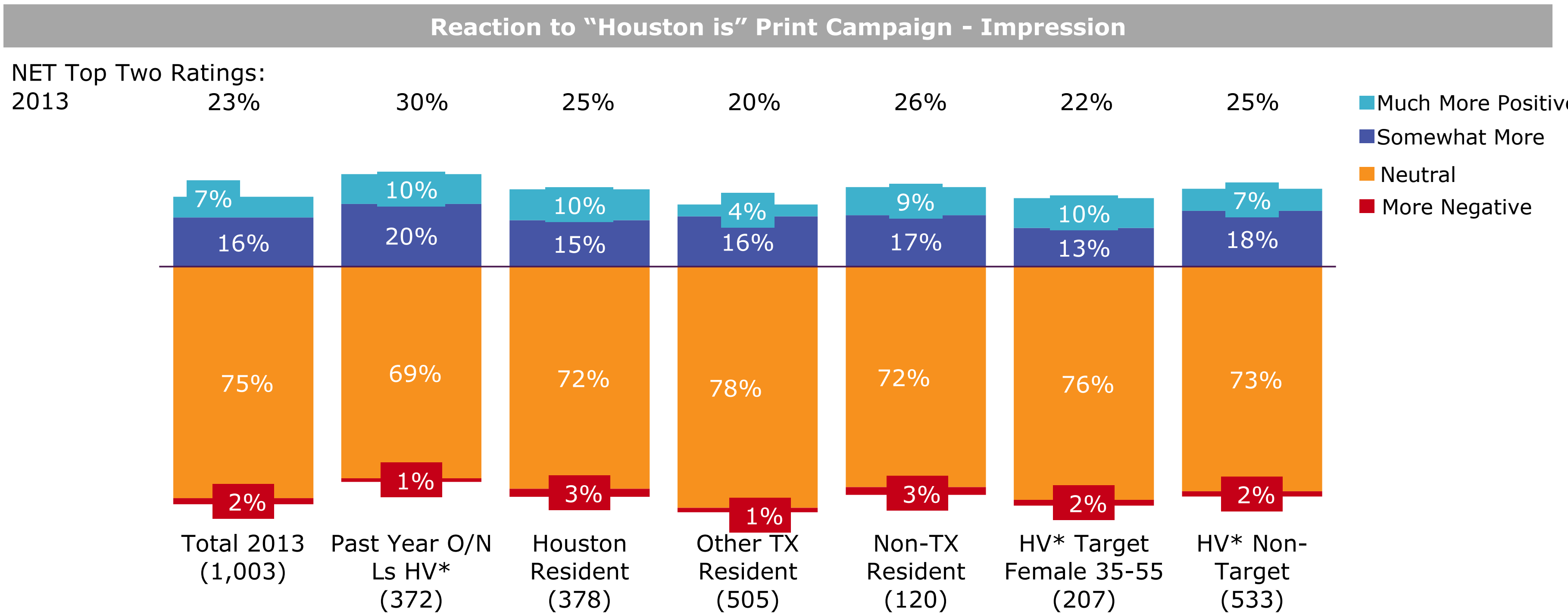
2013	23%	44%	20%	56%
2012	na	55%	22%	64%



Q27. Please indicate if you have seen this ad campaign before.
Q28a. Based on this print campaign, how has your impression of Houston changed? Much more positive (5) to much more negative (1)
Q28b. Overall, how much do you like this campaign? Like very much (5) to dislike very much (1)
Q28c. Based on this print campaign, how likely are you to take an overnight vacation or pleasure trip to Houston in the future? (Extremely (5) to not at all likely (1).; Q28d. How believable do you find this campaign? Extremely (5) to not at all (1).

Impression of “Houston is” print campaign

The campaign most positively influences past visitors; but most have a neutral opinion.

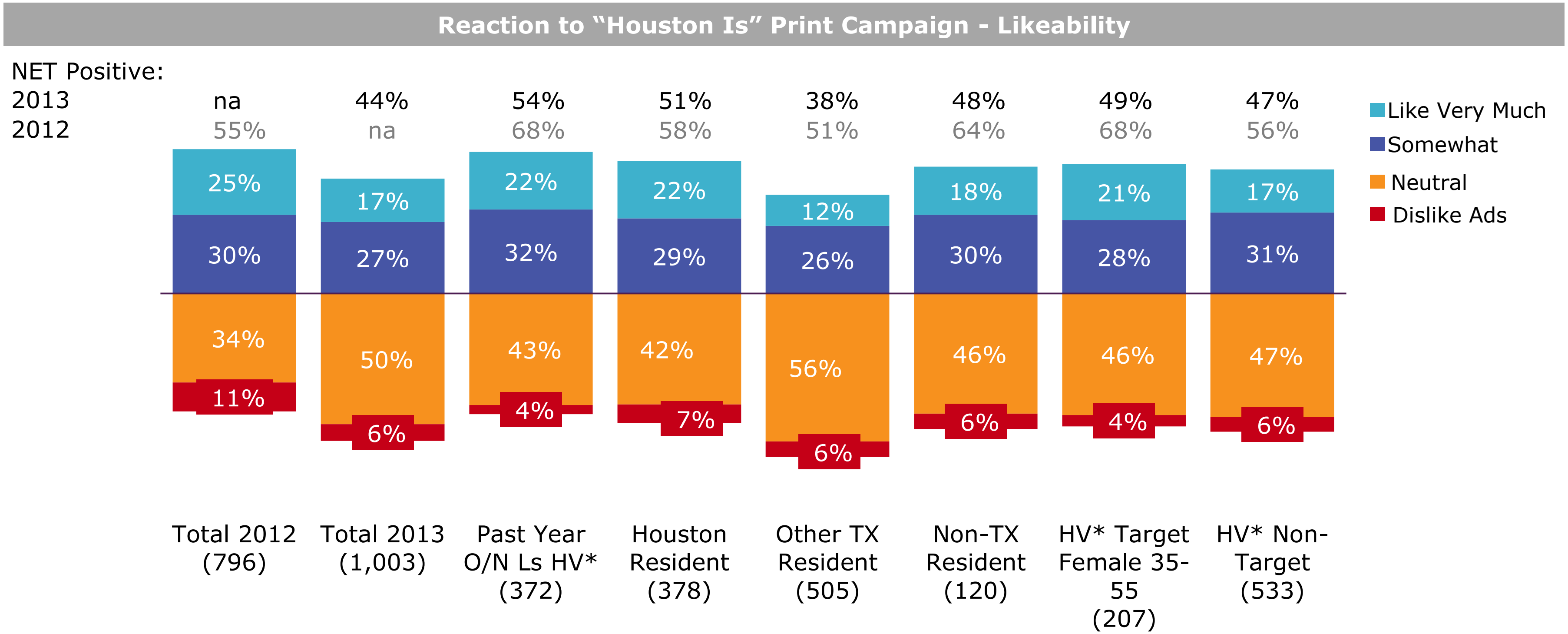


HV* = Houston Visitor

Q28a. Based on this print campaign, how has your impression of Houston changed? Much more positive (5) to much more negative (1).

Likeability of "Houston is" print campaign

Although the campaign receives lower scores than a year ago, it still outperforms the 2012 "My Houston" print campaign (41% positive). Familiarity continues to boost perceptions (past year visitors and residents).

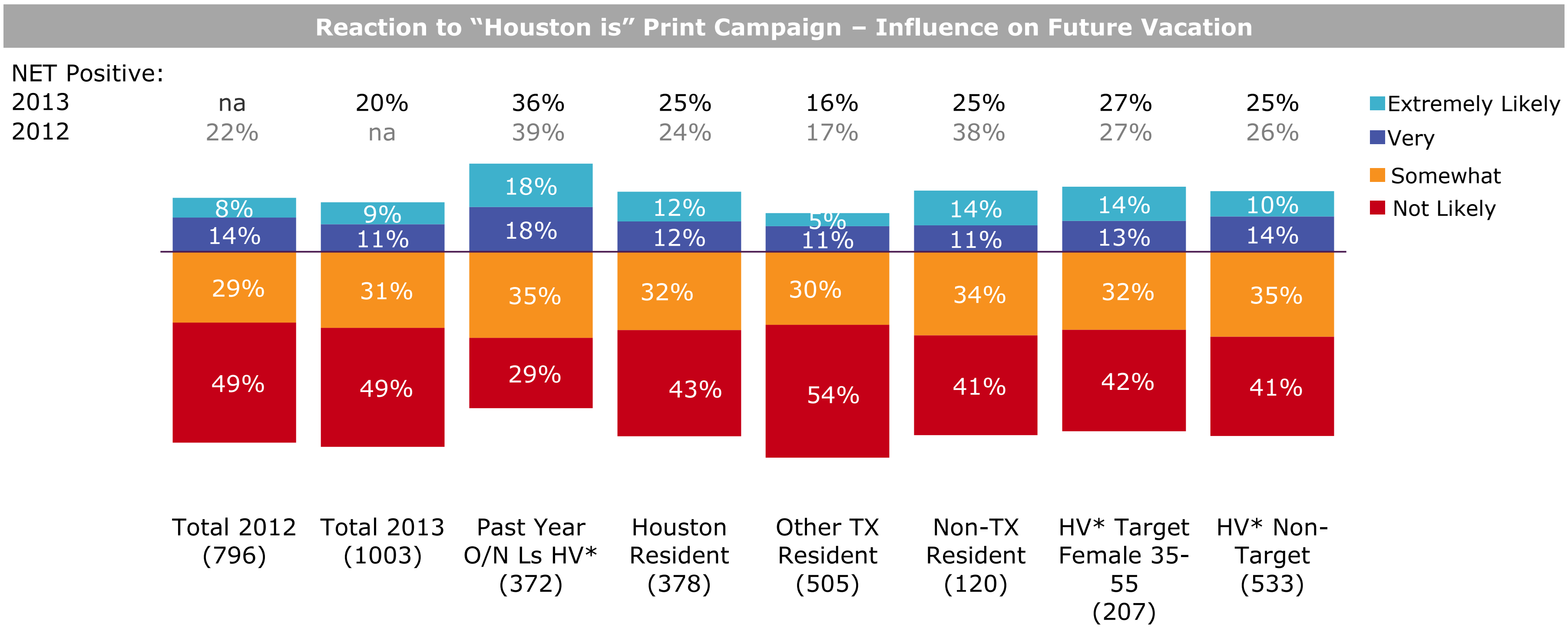


HV* = Houston Visitor

Q28b. Overall, how much do you like this campaign? Like very much (5) to dislike very much (1).

“Houston is” impact of taking vacations to Houston

While “Houston is” nearly matches last year for influencing visitation intent, it continues to do a better job than “My Houston” (15% in 2012, not shown).

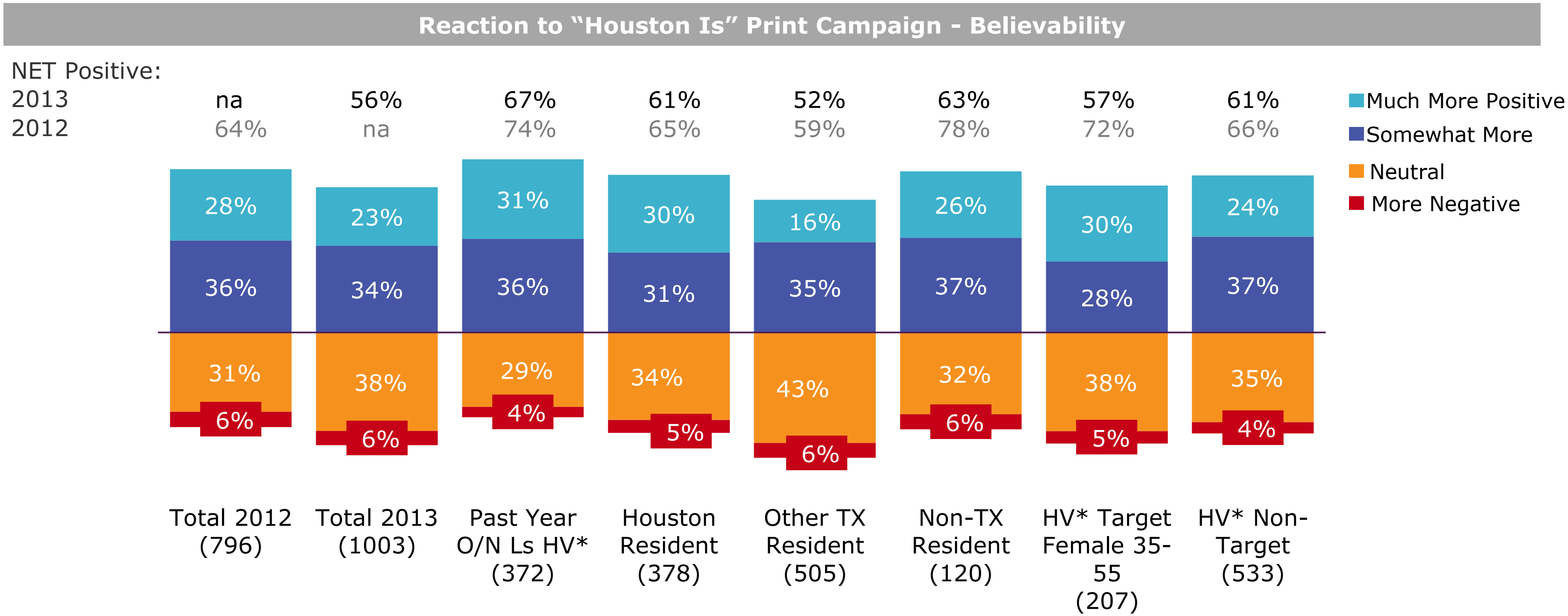


HV* = Houston Visitor

Q28c. Based on this print campaign, how likely are you to take an overnight vacation or pleasure trip to Houston in the future? (Extremely (5) to not at all likely (1).

Believability of "Houston is" print campaign

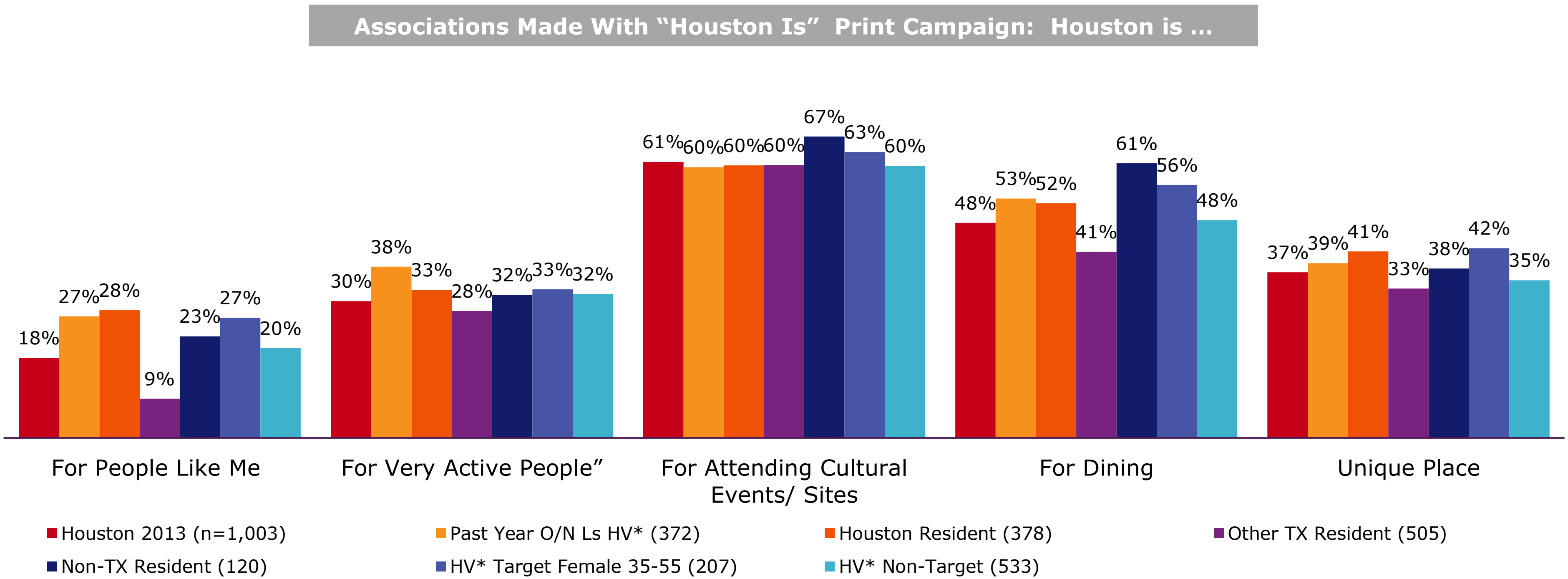
Consistent with other perceptions, believability also trails last year. Again, past year visitors have the most positive viewpoint.



HV* = Houston Visitor
Q28d. Based on this print campaign, how believable do you find this campaign? Extremely believable (5) to not at all (1).

Associations made with "Houston is" print campaign

The print ads builds very favorable associations with *cultural events/sites* and, secondarily, for *dining*.

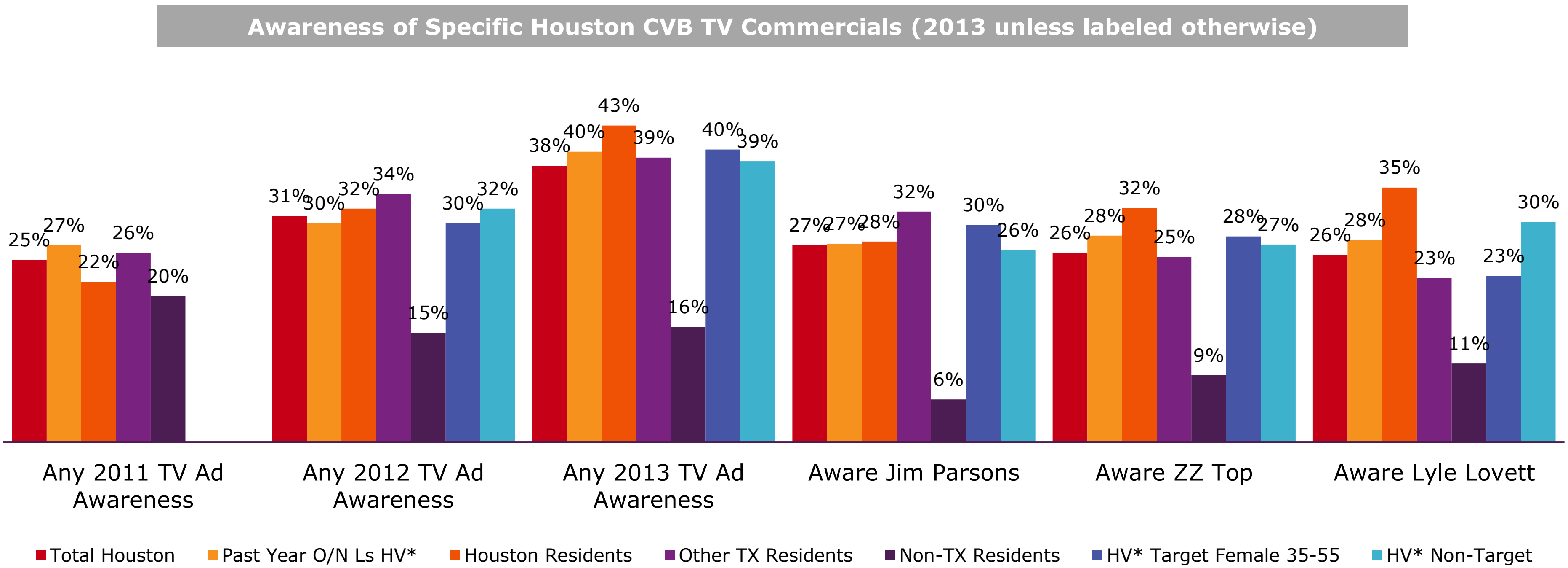


HV* = Houston Visitor
Q28f. What associations do you make with this campaign?

Houston TV commercial awareness

Continuing to climb from prior years:

- In 2013, over a third now recognize the commercials
- The commercials build greater recognition every year: 38% in 2013, from 31% in 2012, from 25% from 13% from 5%).



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

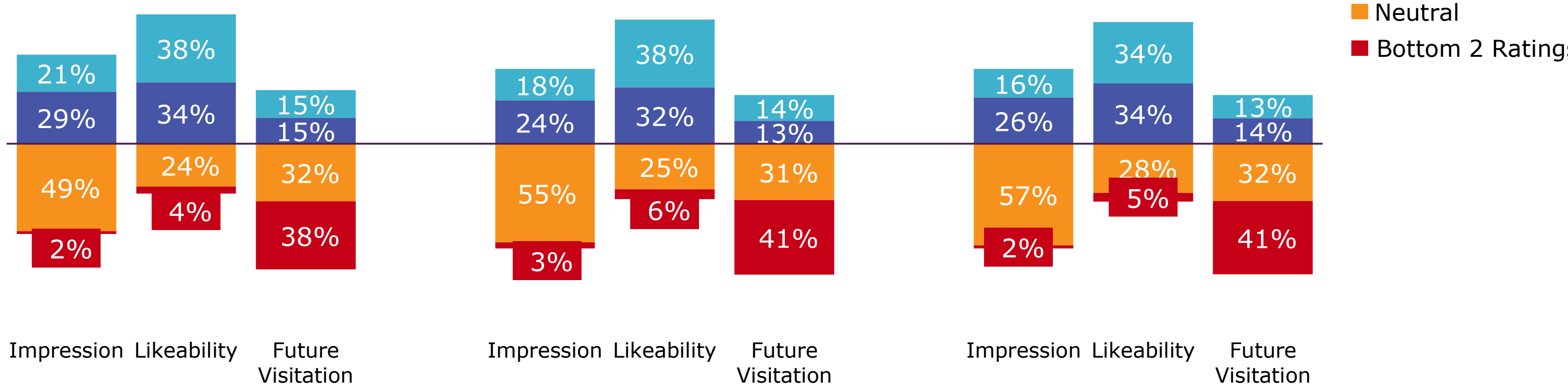
Opinions/reaction to Houston CVB TV commercials

Overall opinions of the TV commercials continue to strengthen over time:

- Houston’s TV ads improve perceptions, especially Jim Parsons (50%)
- Most travelers like the ads (68% to 72%)
- Over 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: 789 for Lyle Lovett; 792 for ZZ Top

NET Top Two Ratings:	Jim Parsons Impression	Jim Parsons Likeability	Jim Parsons Future Visitation	ZZ Top Impression	ZZ Top Likeability	ZZ Top Future Visitation	Lyle Lovett Impression	Lyle Lovett Likeability	Lyle Lovett Future Visitation
2013	50%	72%	30%	42%	69%	27%	42%	68%	27%
2012	42%	66%	26%	36%	63%	24%	35%	61%	22%
2011	43%	65%	25%	36%	64%	24%	31%	56%	20%

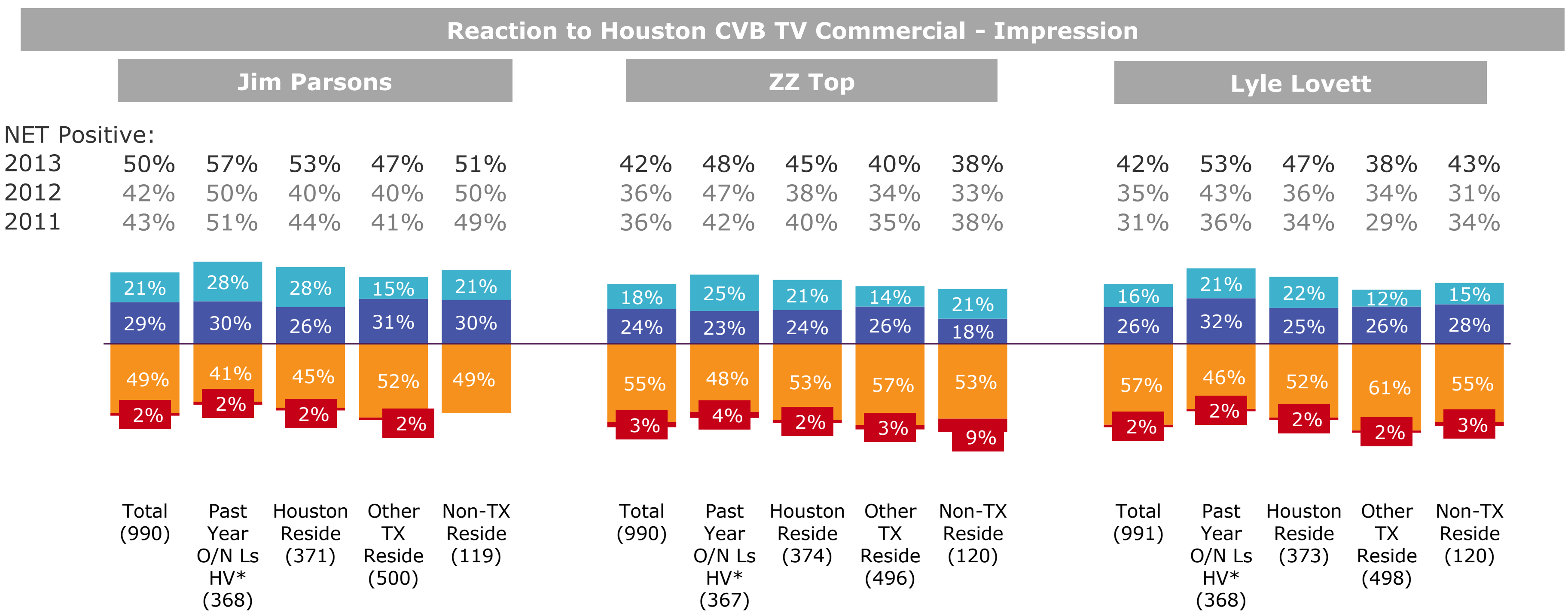


Q31aj/az/al. Based on this commercial, how has your impression of Houston changed? Much more positive (5) to much more negative (1)
Q31bj/bz/bl. Overall, how much did you like this commercial? Like very much (5) to dislike very much (1)
Q31cj/cz/cl. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future? (Extremely (5) to not at all likely (1).

Impression of Houston based on TV commercial

The commercials' impact on impressions of Houston increases from last year and still gets the highest praise from past year overnight Houston visitors.

Much More Positive
Somewhat More
Neutral
More Negative

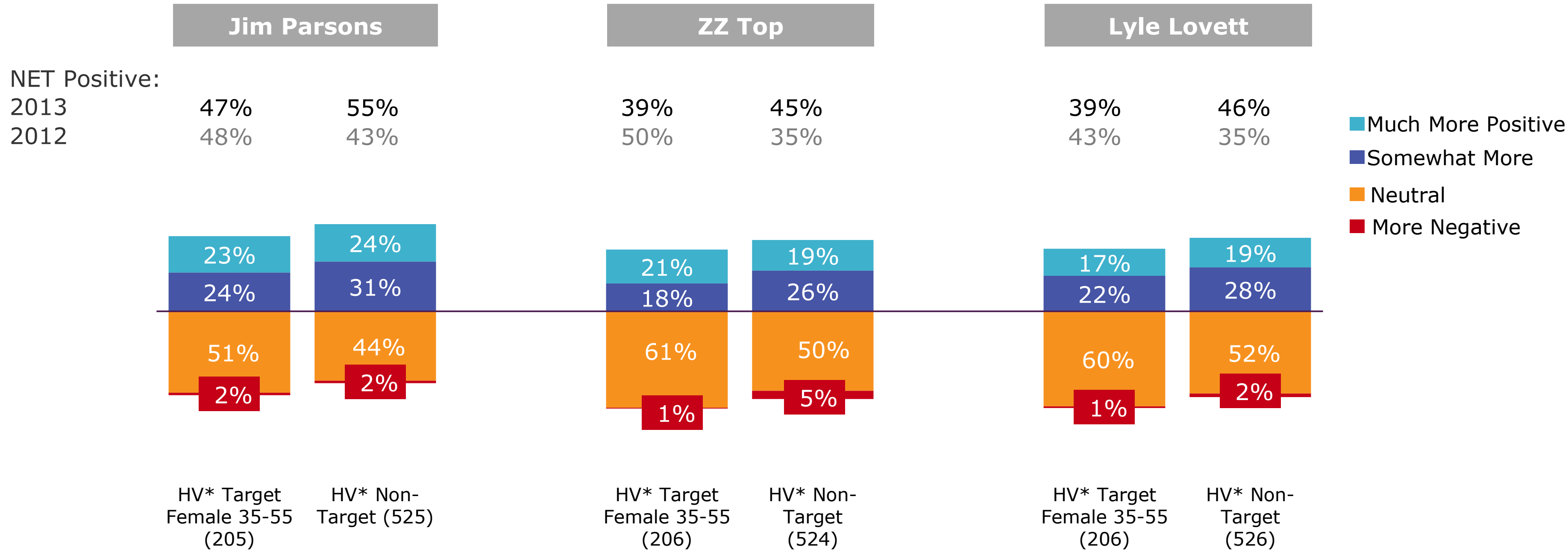


HV* = Houston Visitor
Q31aj/az/al. Based on this commercial, how has your impression of Houston changed? Much more positive (5) to much more negative (1).

Impression of Houston based on TV commercial

The ads work somewhat better for the non-Target group than the Target group, nearly always with a neutral-to-positive impact.

Summary of Opinion/Reaction to Houston CVB TV Commercials Base: 789 for Lyle Lovett; 792 for ZZ Top



Q31aj/az/al. Based on this commercial, how has your impression of Houston changed? Much more positive (5) to much more negative (1).

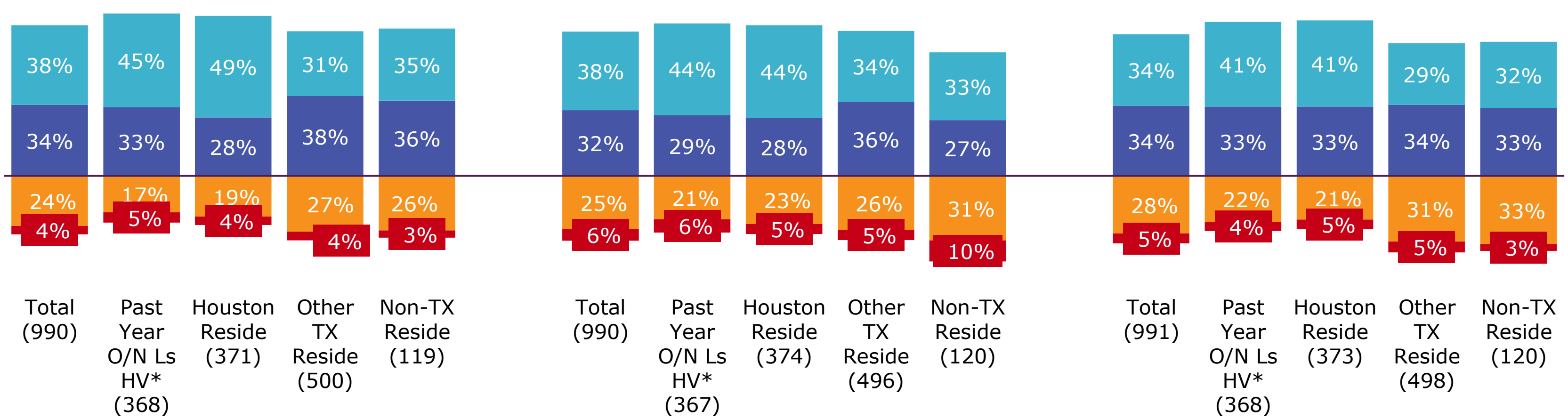
Likeability of Houston CVB TV commercial

Improving from last year's already strong position, more than two-thirds "like" the ads, with past year overnight Houston visitors and Houston residents reacting most favorably.

Like Very Much
Somewhat
Neutral
Dislike Ads

Reaction to Houston CVB TV Commercial - Likeability

NET Positive:	Jim Parsons					ZZ Top					Lyle Lovett				
2013	72%	78%	77%	69%	71%	69%	73%	72%	69%	59%	68%	74%	75%	64%	64%
2012	66%	72%	67%	64%	70%	63%	69%	68%	60%	57%	61%	68%	66%	58%	59%
2011	65%	72%	73%	61%	68%	64%	71%	70%	63%	59%	56%	64%	63%	54%	56%

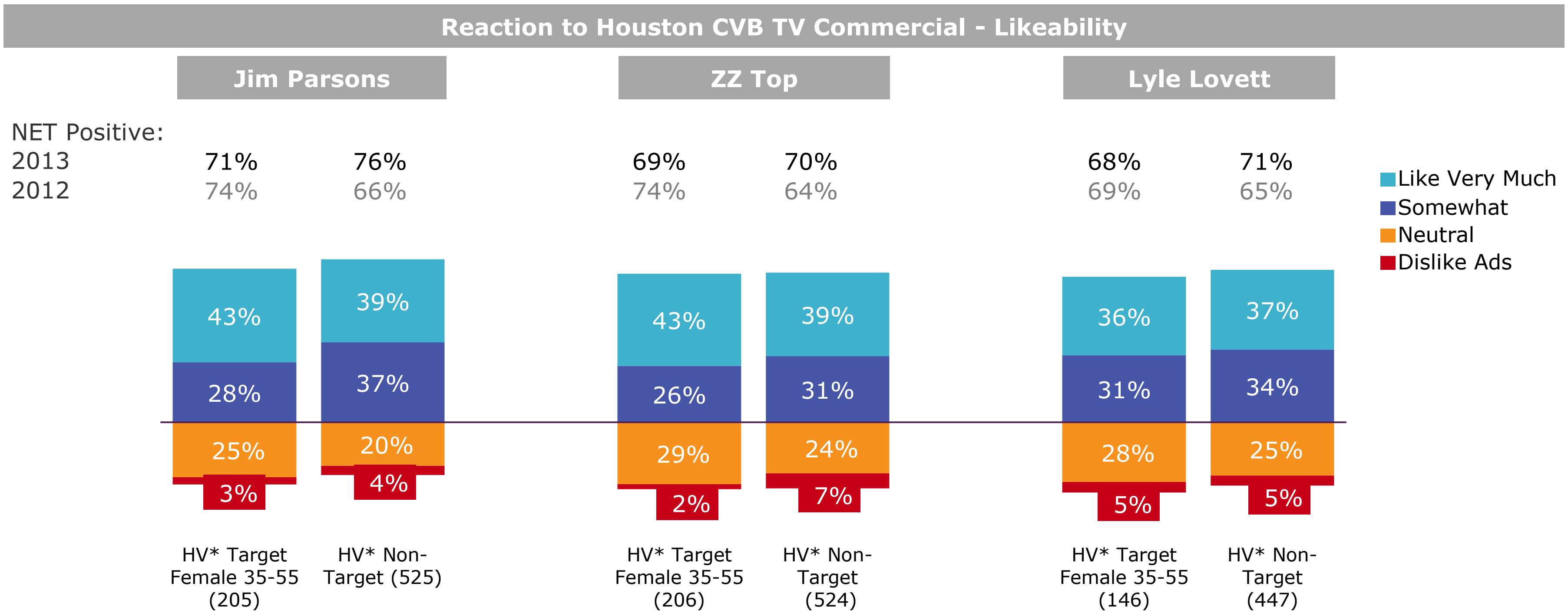


HV* = Houston Visitor
Q31bj/bz/bl. Overall, how much did you like this commercial? Like very much (5) to dislike very much (1).

TNS

Likeability of Houston CVB TV commercial

The three ads appeal to the Target and non-Target groups similarly, except Jim Parsons does slightly better among the Non-Target group.



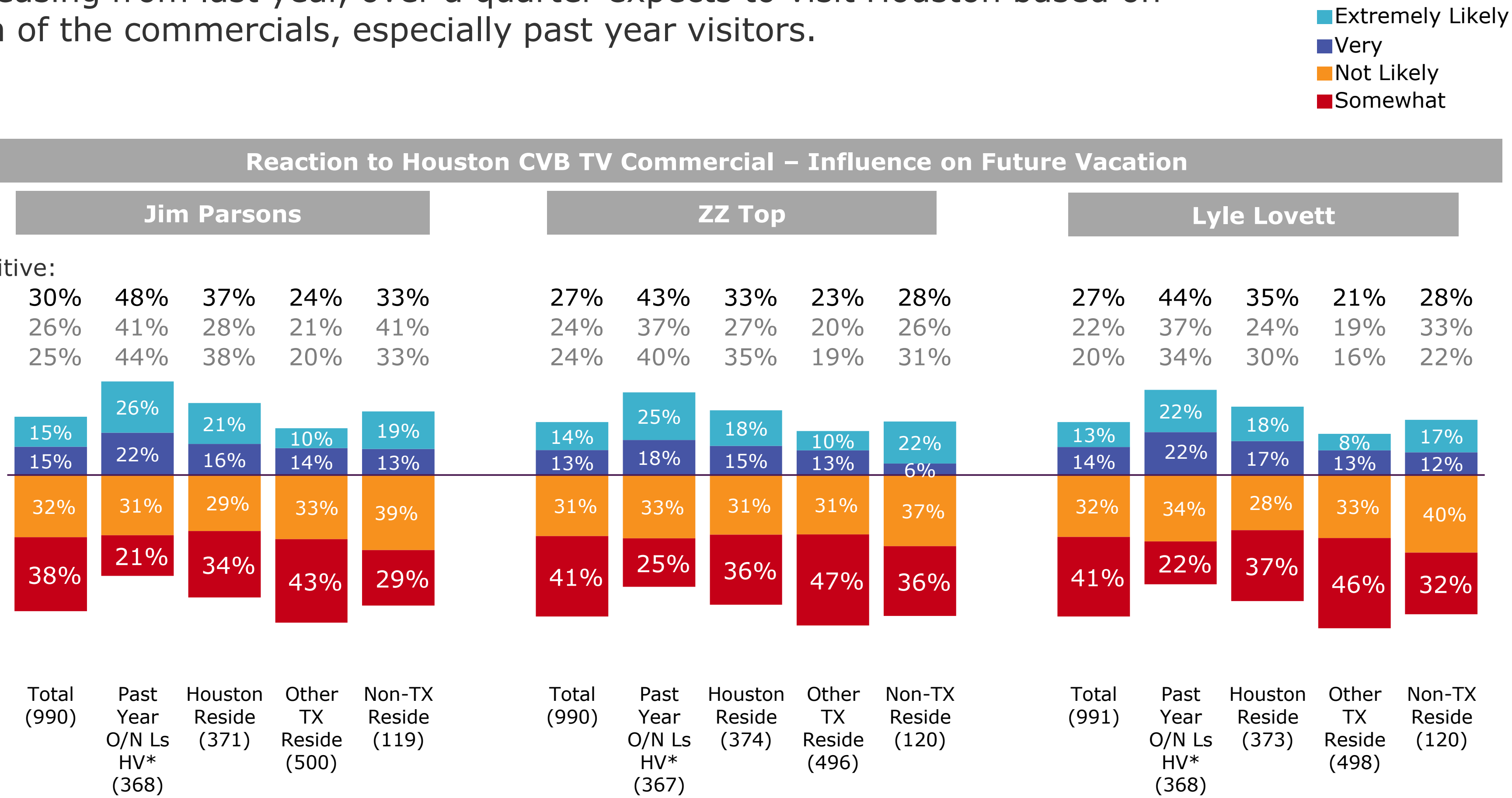
HV* = Houston Visitor
Q31bj/bz/bl. Overall, how much did you like this commercial? Like very much (5) to dislike very much (1).

TV commercial impact of taking vacation to Houston

Increasing from last year, over a quarter expects to visit Houston based on each of the commercials, especially past year visitors.

Reaction to Houston CVB TV Commercial – Influence on Future Vacation

NET Positive:	Jim Parsons					ZZ Top					Lyle Lovett				
	Total (990)	Past Year O/N Ls HV* (368)	Houston Reside (371)	Other TX Reside (500)	Non-TX Reside (119)	Total (990)	Past Year O/N Ls HV* (367)	Houston Reside (374)	Other TX Reside (496)	Non-TX Reside (120)	Total (991)	Past Year O/N Ls HV* (368)	Houston Reside (373)	Other TX Reside (498)	Non-TX Reside (120)
2013	30%	48%	37%	24%	33%	27%	43%	33%	23%	28%	27%	44%	35%	21%	28%
2012	26%	41%	28%	21%	41%	24%	37%	27%	20%	26%	22%	37%	24%	19%	33%
2011	25%	44%	38%	20%	33%	24%	40%	35%	19%	31%	20%	34%	30%	16%	22%

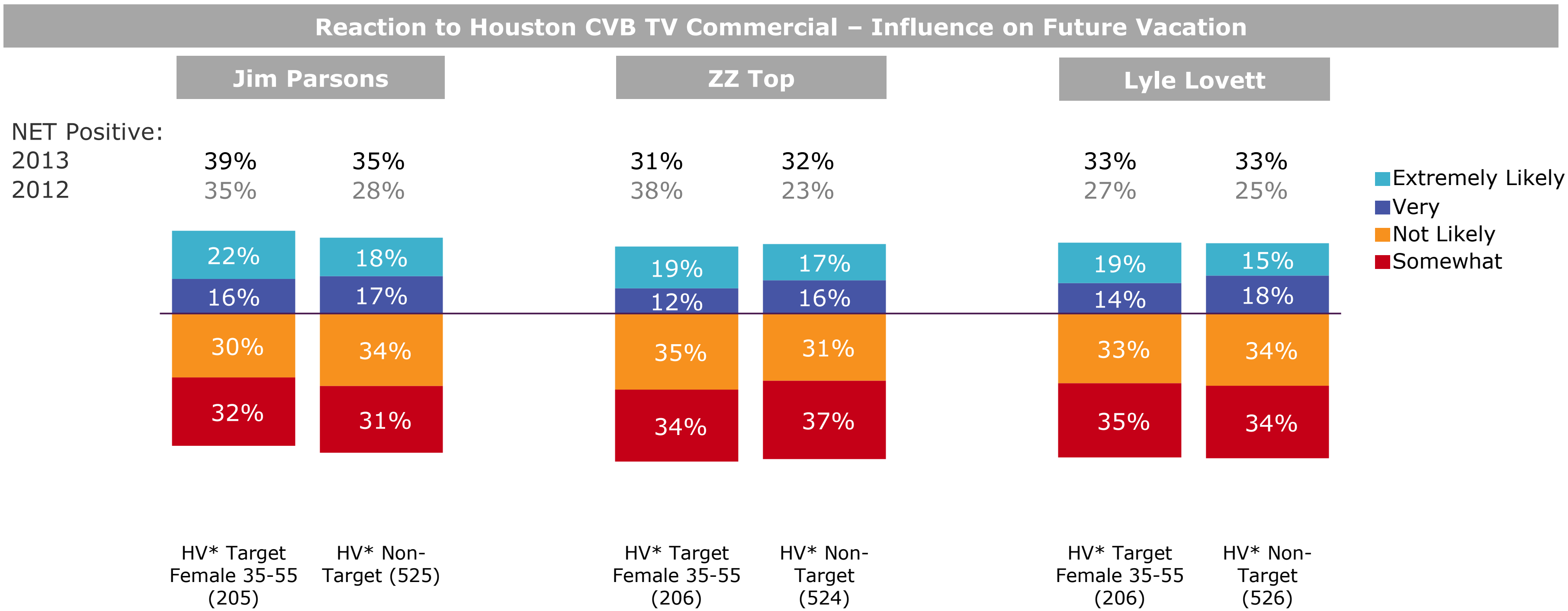


HV* = Houston Visitor
Q31cj/cz/cl. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future?

TNS

TV commercial impact of taking vacation to Houston

The ads build similar intent to visit among the Target group and Non-Target groups.



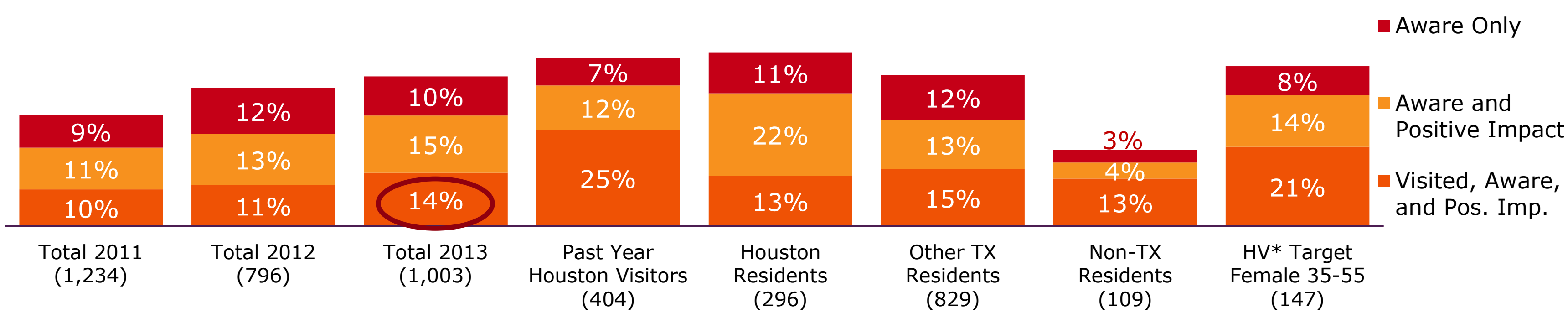
HV* = Houston Visitor
Q31cj/cz/cl. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future?

Total advertising impact on Houston visitation

Success of advertising needs to look at conversion of viewers to visitors as well as awareness:

- Advertising appears very effective – encouraging roughly 1 in 7 (14%) to visit – and is growing each year
- Houston advertising awareness rises each year among all groups except non-Texans
- Two caveats – this measure combines the features of current advertising with past travel – so it really measures Houston's ongoing awareness and effectiveness, rather than these specific ads; also, two of the measures, by definition, includes Houston visitors, so the effectiveness looks much stronger than would be expected (Past Year Houston Visitors and Non-Texas Residents).

NET Aware:								
2013	na	na	40%	44%	46%	40%	20%	42%
2012	na	36%	na	37%	40%	37%	23%	37%
2011	29%	na	na	34%	28%	30%	25%	na



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.
Q27. Pease indicate if you have seen this ad campaign (My Houston) before.
Q30j/Q30z/Q30l. Have you seen this commercial before on TV (Jim Parsons/ZZ Top/Lyle Lovett)?
Q28c/Q31cj/Q31cz/Q31cl. Based on these ads, how likely are you to take an overnight vacation or pleasure trip to Houston in the future?

TNS

8

Appendix IIe. Website Usage from Follow-up Survey

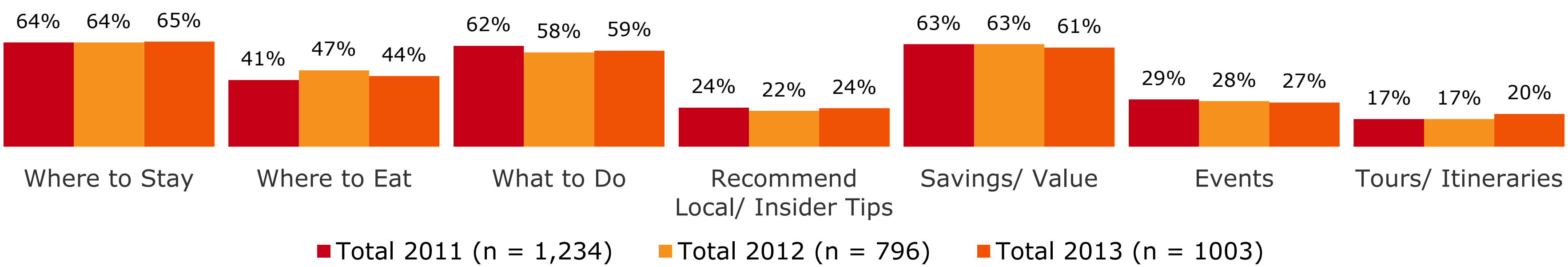
Most important features on website

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

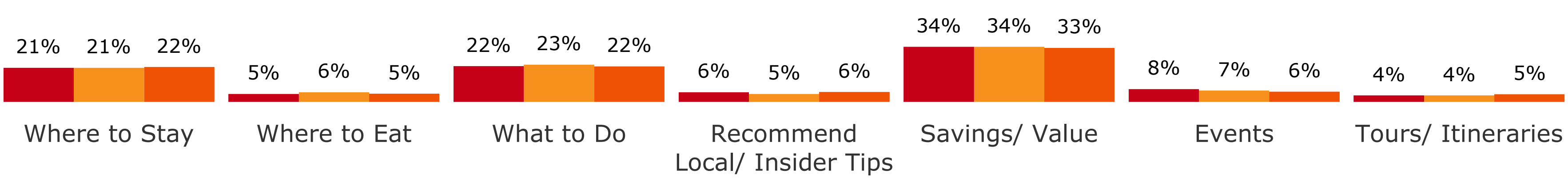
- **Ranked as 1-3:** Travelers consistently rank *where to stay, what to do*, and *savings/value* as the most important destination website features
- **Top Rank Only:** The top ranking mimics the importance of features ranked 1-3 with *saving/value* clearly leading other reasons, as travelers search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

% Rank in Importance (2013 unless labeled otherwise)

Ranked as 1-3



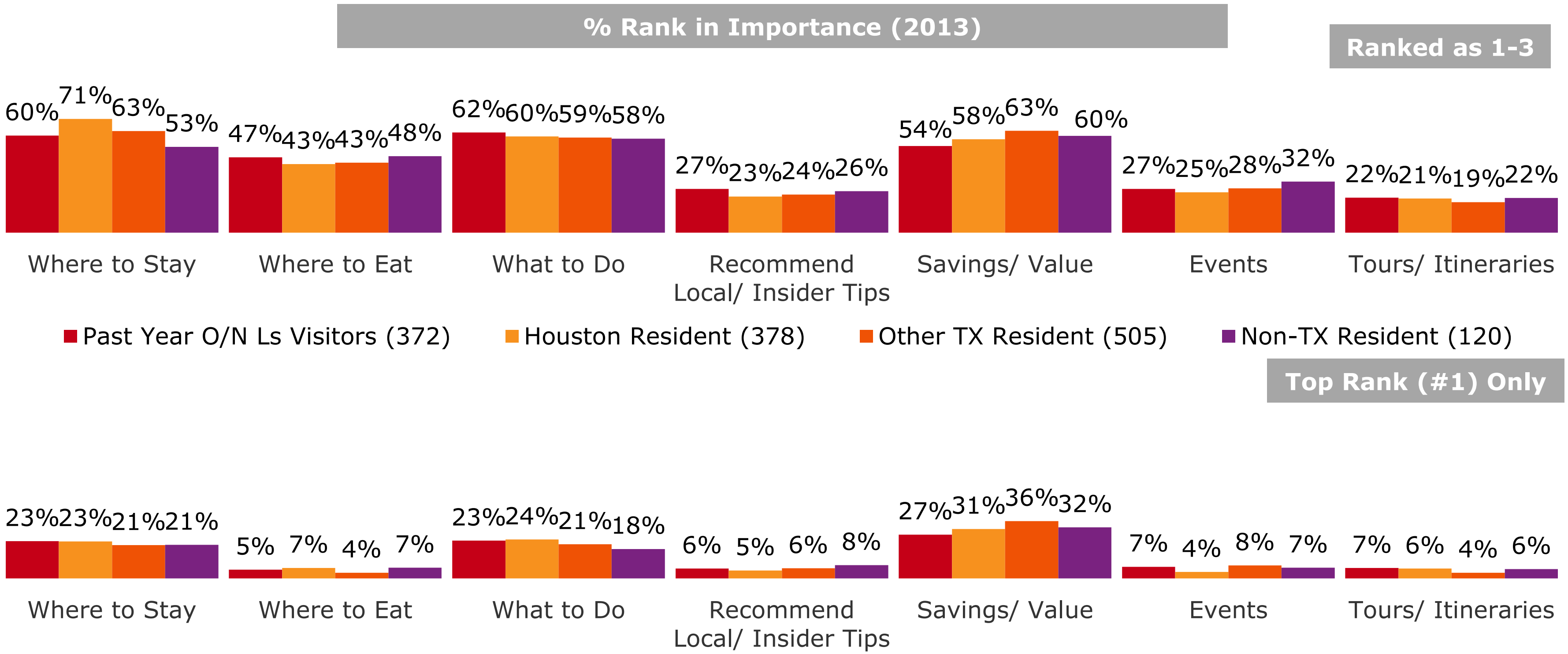
Top Rank (#1) Only



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 or on transportation in 2013:

Other Features Cited as Important: 2011

- Pricing/costs/correct pricing/packages/ discounts/coupons/free "stuff" (9)
- Transportation - air/ground/parking (5)
- Weather during year – when pleasant (4)
- Hotels – selection/prices/bedbugs/book on web (4)
- Sightseeing/sights/fun event schedule (4)
- Maps/directions/distance to attractions (4)
- Historical sites/gardens (4)
- Shopping (3)
- Safety (2)
- User/visitor reviews (2)
- Pictures/scenic descriptions (2)
- Nightlife (2)
- Entertainment
- RCI/II Timeshare location
- Birding info
- Fitness/Health options
- Where the locals go
- Good restaurants
- Fishing
- Believability
- Most popular destinations
- Access for physically disabilities
- Pet friendliness

Number of mentions = 1 unless in parens (#)

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; transportation options (3)
- Food; restaurant reviews (2)
- Guest reviews; reviews in general (2)
- User friendliness; navigation and 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: 2012

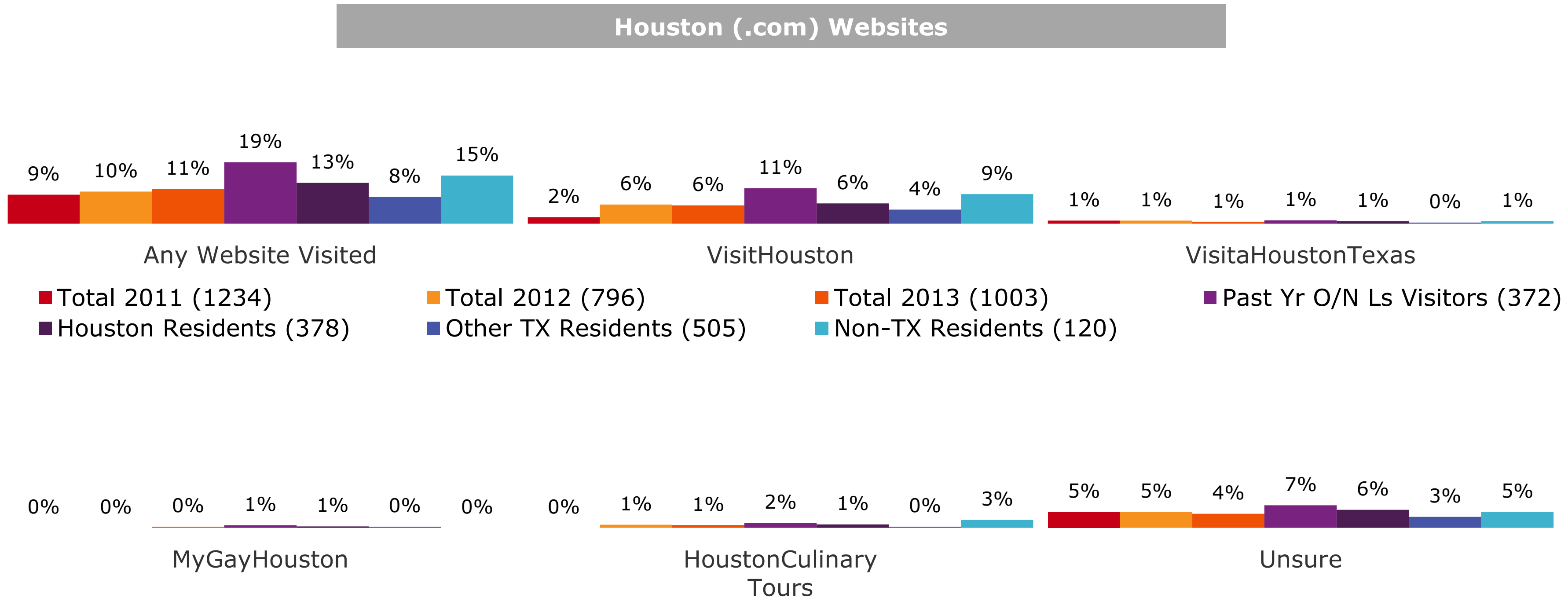
- Things to see/do (6):
  - Good nightlife
  - Shopping
  - Things, place, points of interest
  - History – love history when travelling
  - Pool/beach availability
  - Everyone can have fun and no one needs to be excluded
- Travel related: distance from home, mode of transportation, transportation alternatives, 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 (#)

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

Houston websites visited

One in 9 (11%) has visited a Houston website, but that level almost doubles among past year overnight Houston visitors.

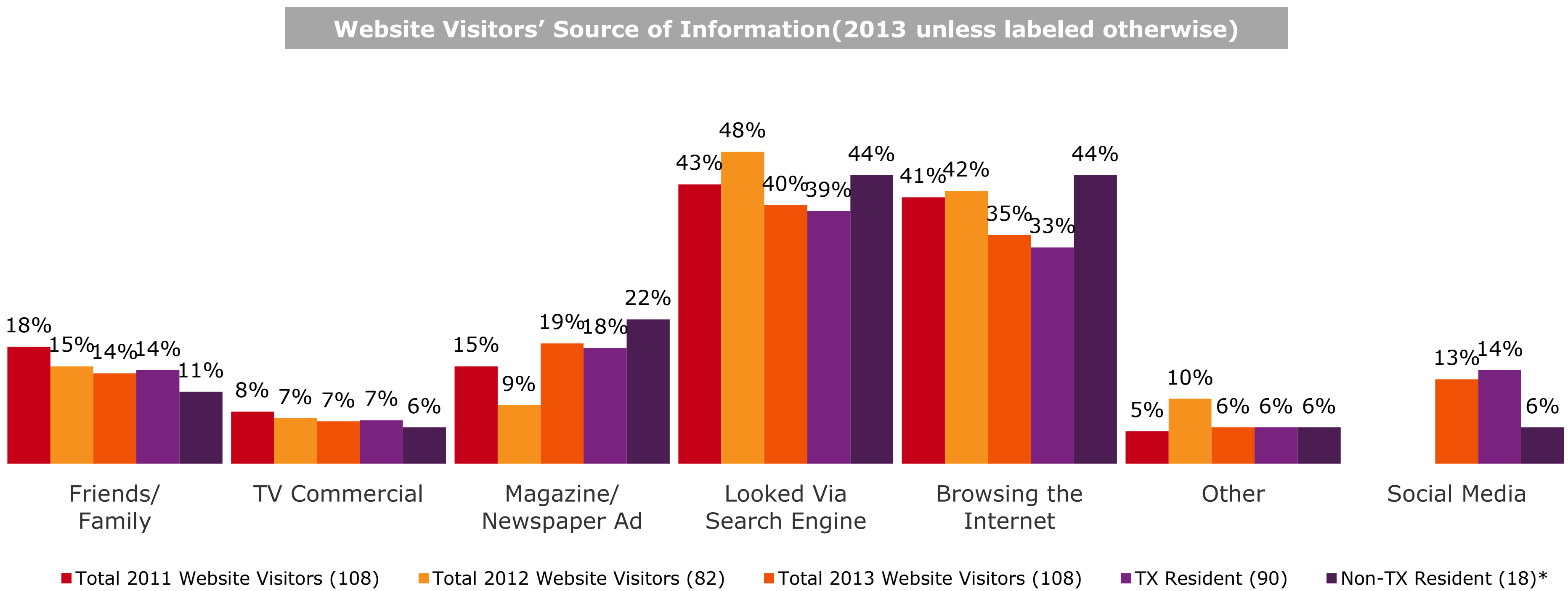


Q19. Which of the following websites for the Greater Houston Convention and Visitors Bureau, if any, have you visited in the past 12 months?

TNS

Houston website discovery

Most travelers find the Greater Houston CVB website via an Internet search.

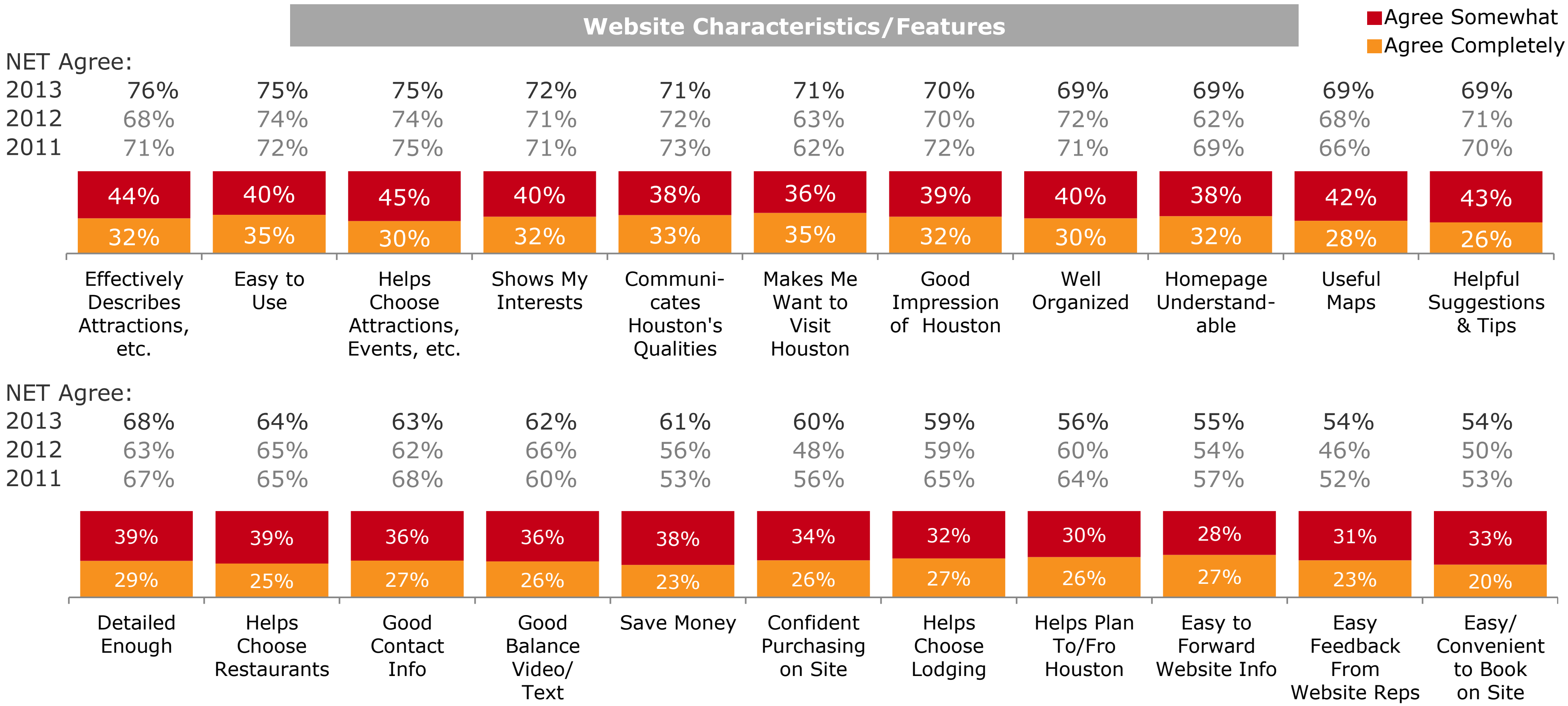


* Very small sample; treat as qualitative only

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 *promoting local attractions, ease of use, communicating Houston’s qualities*, and *engaging interest*.

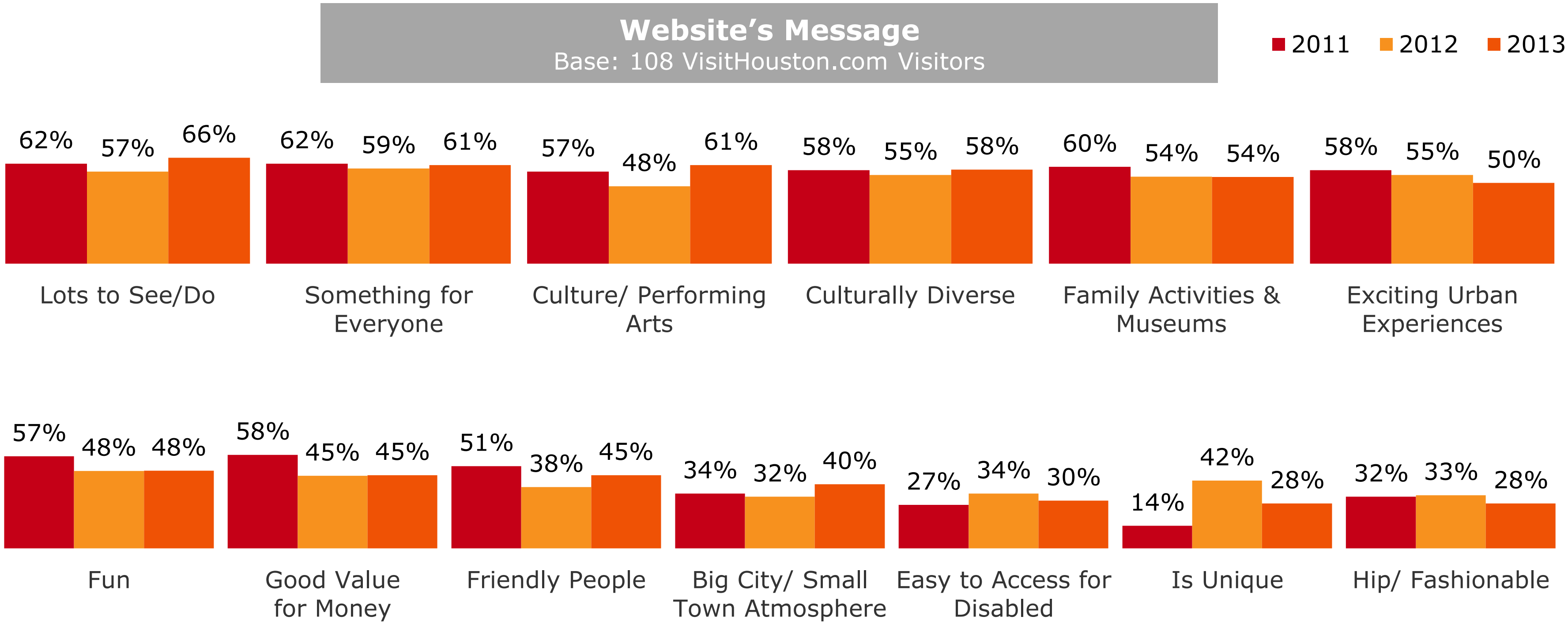


Q21. How much do you agree or disagree with the following statements regarding the VisitHouston.com characteristics or features?

TNS

What the website says about Houston

From the website, most users "take away" the variety of activities available in Houston: *lots to see/do, something for everyone*, and *culture/performing arts* lead website messages.



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

Satisfaction with Houston website

Satisfaction with the website remains very high and rebounds from a slight dip last year.

* Very small sample; treat as qualitative only

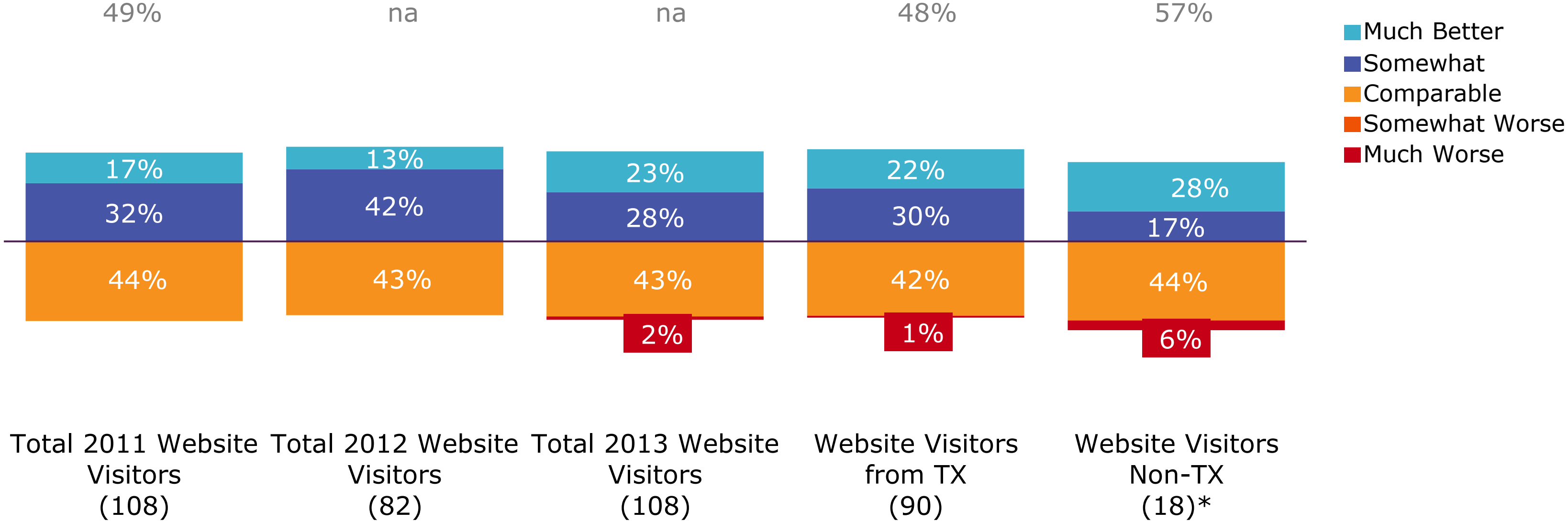
Q23. What is your overall satisfaction with the Greater Houston CVB website?

Houston's website competitive comparison

Similar to last year, half (51%) of Houston's website visitors deem it as much better or somewhat better than similar websites for city destinations; only two consider it worse than other sites.

Houston Website's Competition

NET Better:	Total 2011 Website Visitors (108)	Total 2012 Website Visitors (82)	Total 2013 Website Visitors (108)	Website Visitors from TX (90)	Website Visitors Non-TX (18)*
2013	na	na	51%	52%	44%
2012	na	55%	na	57%	46%
2011	49%	na	na	48%	57%



* 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 overall satisfaction with the site, even when reflecting on possible improvements. While suggestions vary, *discounts/savings, city information*, and *maps* receive more mentions.

Website Features to Improve: 2011

- Great/comprehensive/complete/good as is (11)
- Easier/more user friendly/navigation/hyperlinks (hard to return to home page)/chat support/Twitter link (8)
- Current/up-to-date/Seasonal activities/events/things to do/graphics showing activities (7)
- Coupons/discounts/more savings/discounts (4)
- Cost-related: Cost estimates/hotel prices/admission prices/affordable suggestions for family (4)
- Transportation: options, ease of getting around without car/pictures of freeways (3)
- Night activities/nightlife (3)
- Museums, landmarks, and history (2)
- Maps: show what else is in area/downloadable maps (2)
- Sightseeing/things to do (2)
- Make family entertainment places easy to find
- Pictures
- More info on restaurants and shopping
- More realism – such as the heavy smog
- Fewer graphics
- Clubs
- Options for disabled people

Number of mentions = 1 unless in parens (#)

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 (#)

Q25. What features or sections should the website improve?

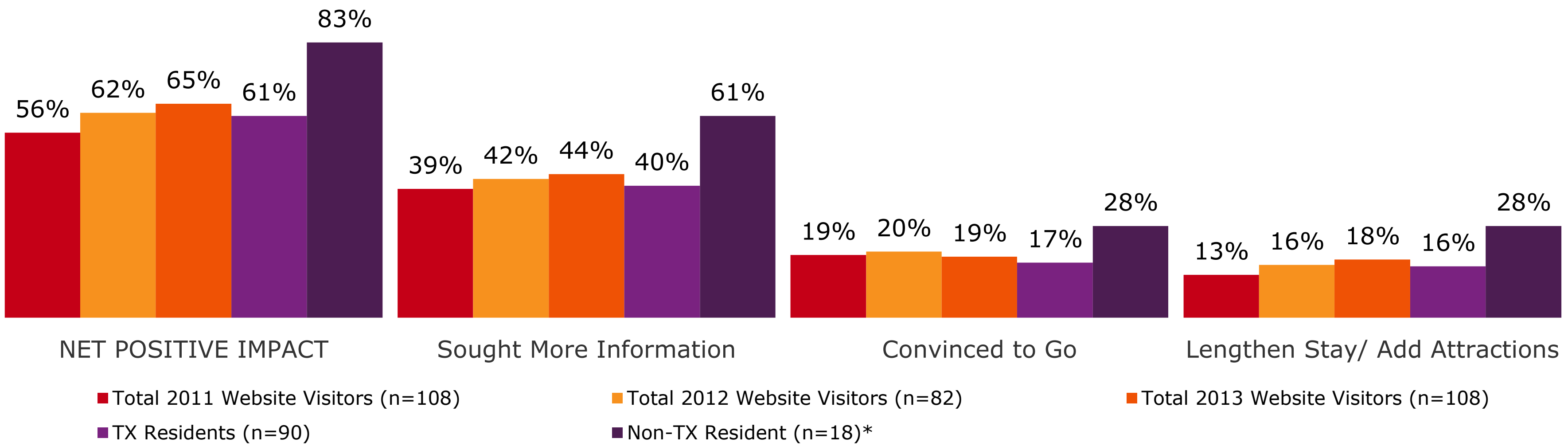
TNS

Perceived impact of Houston's website

Two-thirds of website users positively react to Houston's website in one of three listed ways: they seek more information, book a trip, or stay longer/visit additional attractions:

- The website primarily causes users to seek more information
- The website does not affect everyone positively; potential visitors may decide not to visit (2% for total website visitors, not shown) or simply believe that the website did not influence them at all (33%).

Impact of Houston's Website (2013 unless labeled otherwise)



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

9

Appendix IIf: Houston Visitors Choices and Characteristics from Follow-up Survey

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 continues to climb from prior years – both day (40%) and overnight trips (37%)
- While most Texans do not spend the night, they usually (59%) opt for a hotel if they do
- Those outside Texas stay longer per trip.

	Total 2011 (n=1,234)	Total 2012 (n=796)	Total 2013 (n=1,003)	Past Yr. O/N Leisure Visitors (n=372)	Houston Residents (n=378)	Other Texas Residents (n=505)	Non-Texas Residents (n=120)
Day Trips							
NET Any	34%	36%	40%	59%	62%	28%	24%
Mean (Inc. 0)	1.9	2.5	2.8	4.9	6.0	0.8	0.9
Mean (Excl. 0)	5.5	6.8	7.0	8.2	9.8	3.0	2.5
Overnight Trips							
NET Any	33%	34%	37%	100%	30%	34%	73%
Mean (Inc. 0)	1.3	1.4	2.0	5.3	3.2	1.1	2.0
Mean (Excl. 0)	3.9	4.2	5.3	5.3	10.8	3.1	2.7
Hotel Nights in Houston							
% With a Hotel Stay in Houston	21%	19%	22%	58%	18%	20%	40%
% of Houston O/Ns w/ Hotel Stay	63%	57%	59%	59%	62%	59%	55%
Average Total Hotel Nights (if any)	3.6	4.6	4.1	4.1	3.6	3.5	6.1
Average Hotel Nights/Trip (if any)	2.2	3.0	3.3	3.3	3.0	2.7	5.3

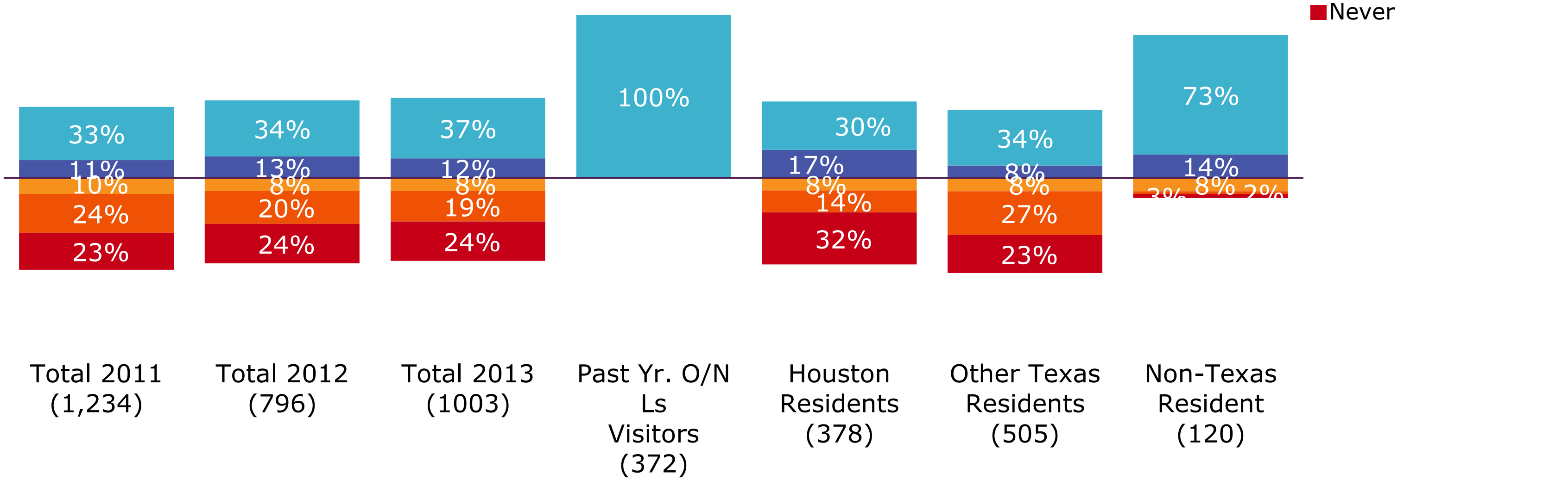
Q14. Please indicate the total number of leisure trips you have made to the Houston area in the past 12 months.
Q14a. Of all your overnight trips to Houston in the past 12 months, how many total nights did you stay in a hotel?
Q14b. On your last overnight trip to Houston, how many total nights did you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

Recency of last overnight leisure trip to Houston

About half have visited Houston in the past 2 years, similar to prior waves.

Elapsed Time Since Last Houston Overnight Visit (2013 unless labeled otherwise)

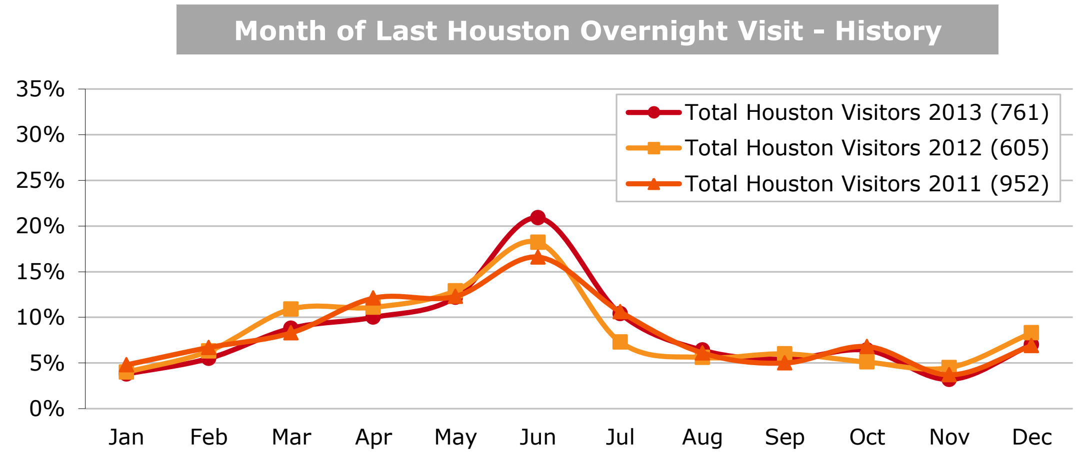
NET Within Past 2 Years:	Total 2011 (1,234)	Total 2012 (796)	Total 2013 (1003)	Past Yr. O/N Ls Visitors (372)	Houston Residents (378)	Other Texas Residents (505)	Non-Texas Resident (120)
2013	na	na	49%	100%	47%	42%	88%
2012	na	47%	na	100%	43%	41%	88%
2011	44%	na	na	100%	53%	37%	66%

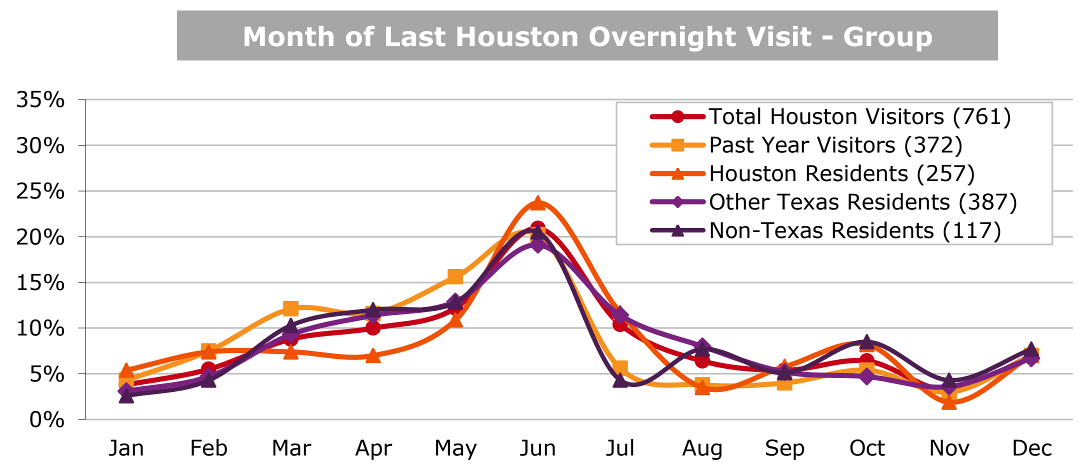


By definition: Must have visited Houston in past 5 years, business or leisure, overnight not required
Q15. When was your last overnight leisure trip to the Houston area?

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.





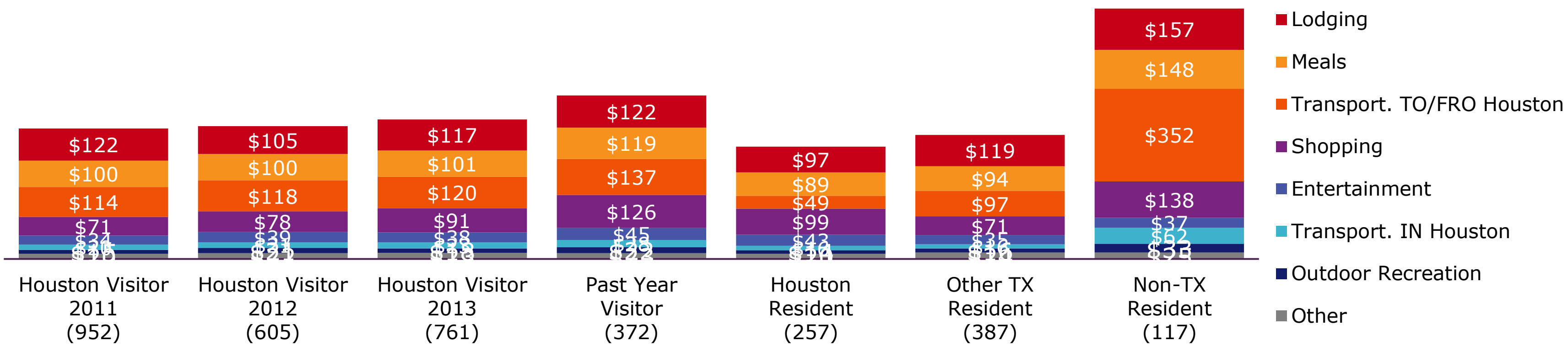
Q16. What was the month of your last overnight leisure trip to the Houston area?

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 Texans spend about the same, whether they live in Houston or not
- Total spending exceeds the level noted in the past two waves ($530 from $503 in 2012).

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



NET Within Past 2 Years:

	Houston Visitor 2011	Houston Visitor 2012	Houston Visitor 2013	Past Year Visitor	Houston Resident	Other TX Resident	Non-TX Resident	
2013	**na**	**na**	**$530**	**$621**	**$426**	**$471**	**$952**	**Average Total Spending**
	na	**na**	**$410**	**$485**	**$377**	**$374**	**$600**	**Average exc. Travel To/Fro Houston**
2012	na	$503	na	$606	$430	$451	$823	**Average Total Spending**
	na	$385	na	$461	$364	$358	$520	**Average exc. Travel To/Fro Houston**
2011	$485	na	na	$515	$476	$421	$936	**Average Total Spending**
	$371	na	na	$401	$392	$329	$608	**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?

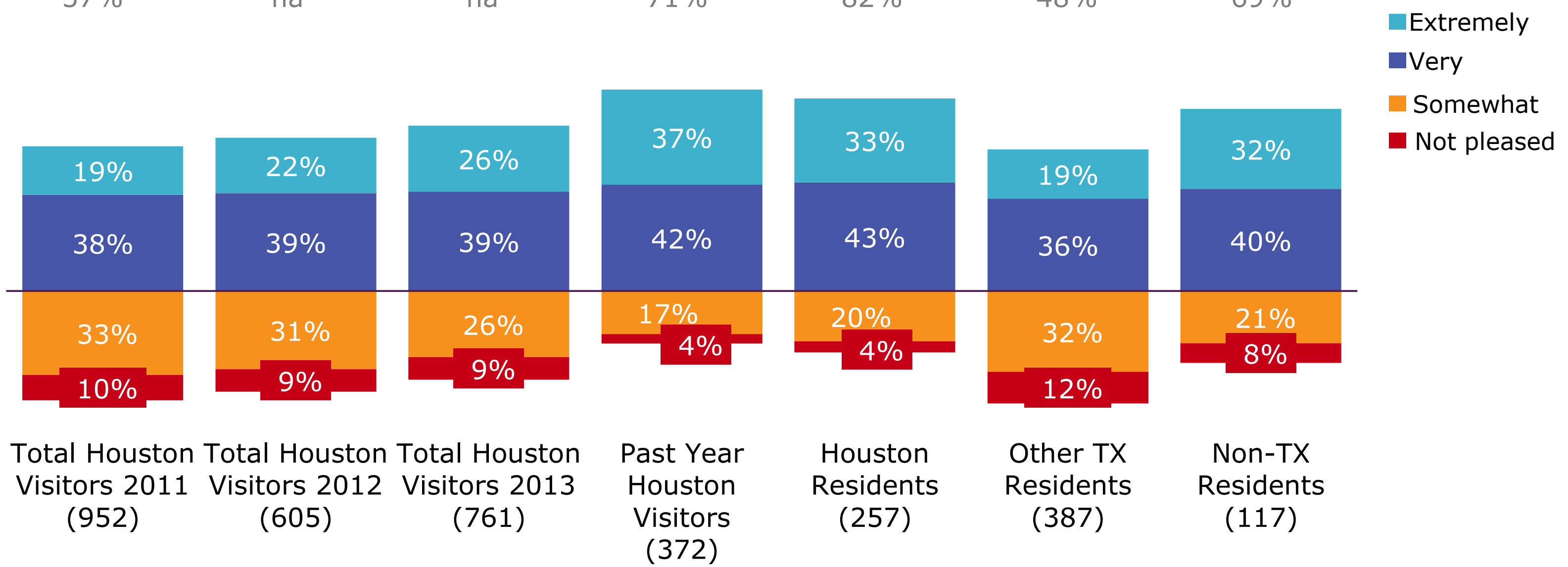
TNS

Satisfaction with Houston visit

Houston satisfies an increasing majority of its overnight leisure visitors, especially past year leisure visitors.

Houston

NET Top Two Box (Extremely/Very Pleased):							
2013	na	na	65%	79%	76%	56%	72%
2012	na	60%	na	75%	67%	53%	70%
2011	57%	na	na	71%	82%	48%	69%



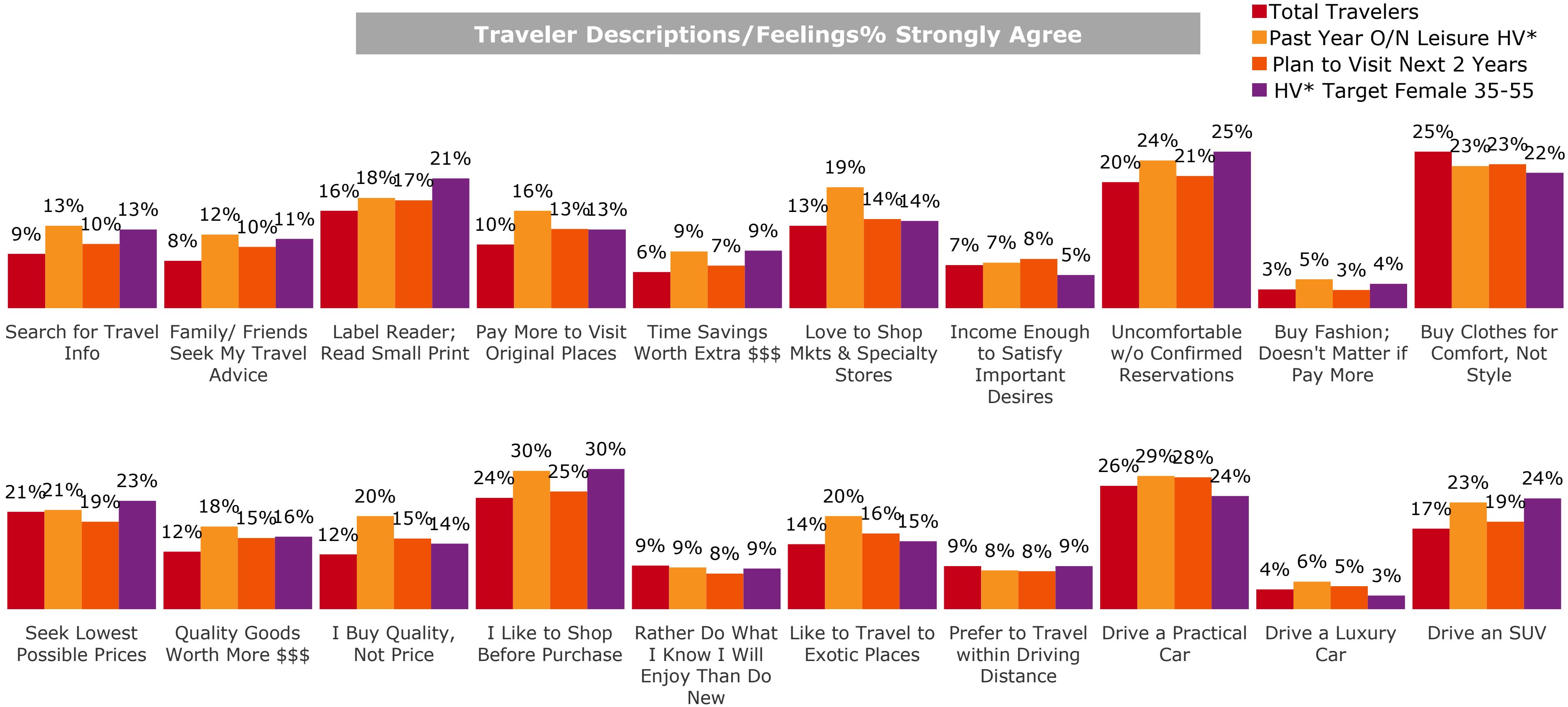
Q18. Overall, how pleased were you with your last overnight leisure trip to the Houston area?

10

Appendix IIg: Attitudes and Behaviors from Follow-up Survey

General description/feelings of traveler

Often sharing similar attitudes, Houston visitors sometimes differ from other travelers (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.

TNS

General description/feelings of traveler

Houston Visitor groups vary from other travelers in these ways:

Characteristics of Target (Female Houston Visitors 35-55)

- Drive an SUV
- Like to shop around before making a purchase
- It's worth it to pay more for quality goods
- Label reader; won't buy anything without reading the small print
- Uncomfortable starting a trip without confirmed reservations for all nights
- Frequently search for information on travel destinations
- Unlikely to buy clothes for comfort rather than style
- 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
- Worth it to pay more for quality goods
- Buy based on quality, not price
- Somewhat higher incomes

Characteristics of Recent Houston Leisure Visitors

- Prepared to pay more to visit places that offer something really original
- Love shopping in markets and small, specialty stores
- Worth it to pay more for quality goods
- Buy based on quality, not price
- Like to shop around before making a purchase
- Like to travel to exotic places
- Drive an SUV
- Somewhat higher incomes

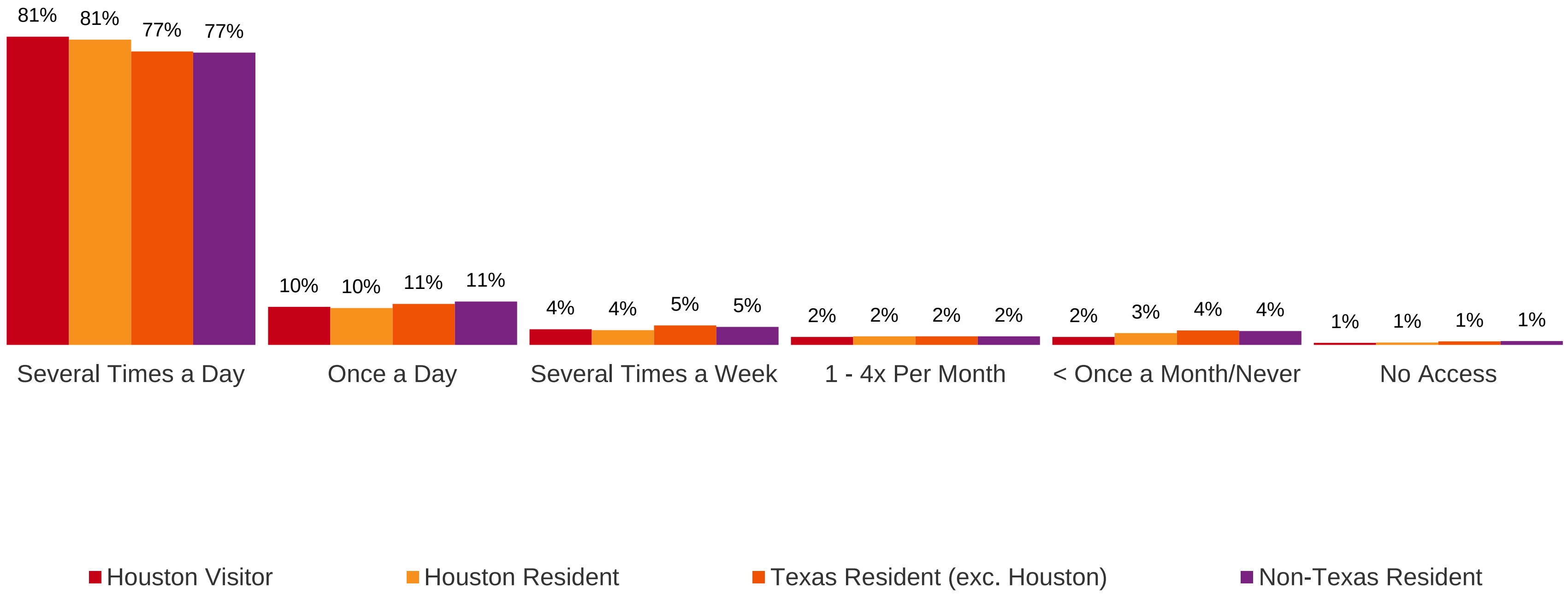
Q37. For each statement below, can you please tell me how much you agree or disagree that the statement describes you or your feelings.

11

Digital Behavior

Frequency of Internet Access

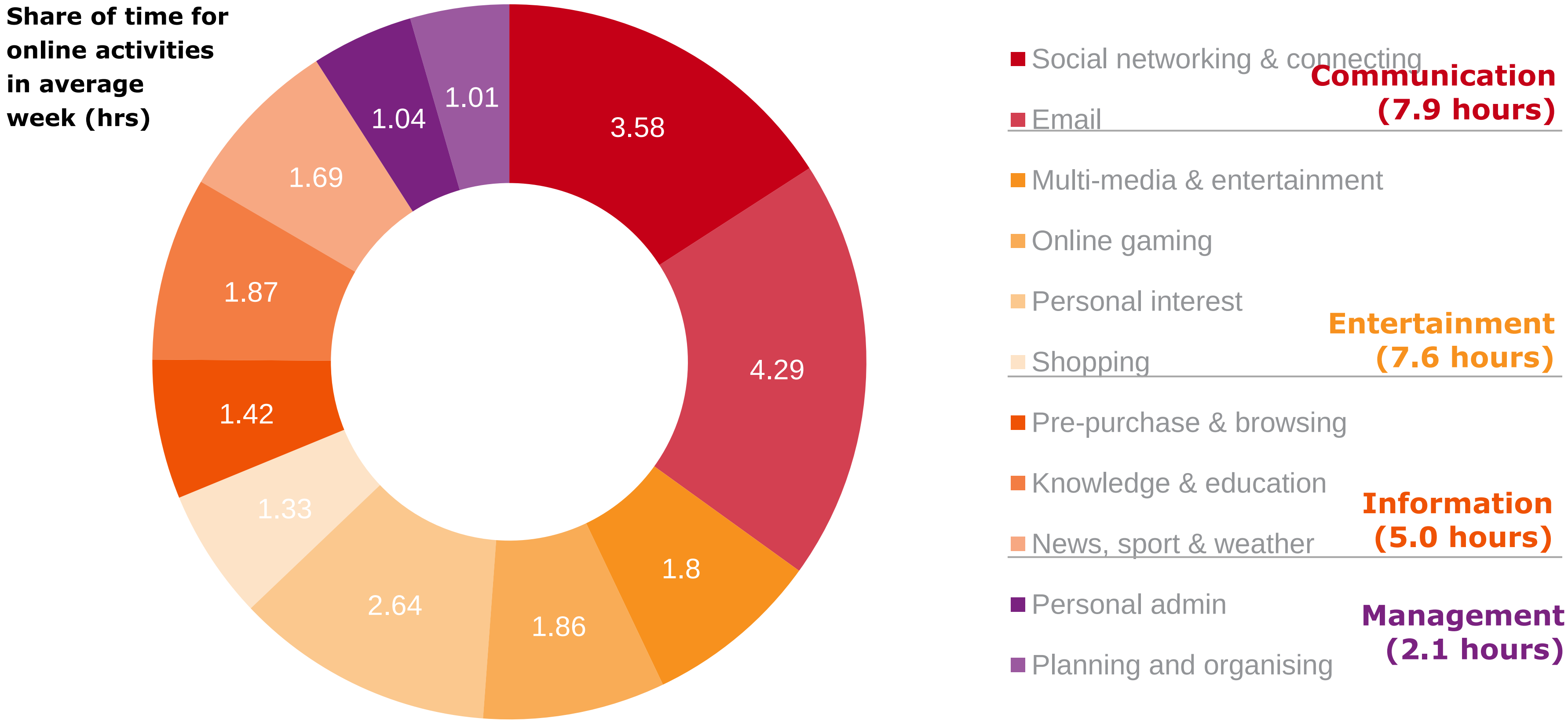
Most travelers access the internet several times a day, and roughly nine out of 10 access it daily.



DL3. In general, how often do you personally access the internet for any purpose from any location (including via a mobile device)?

Time Spent on Activity per Week

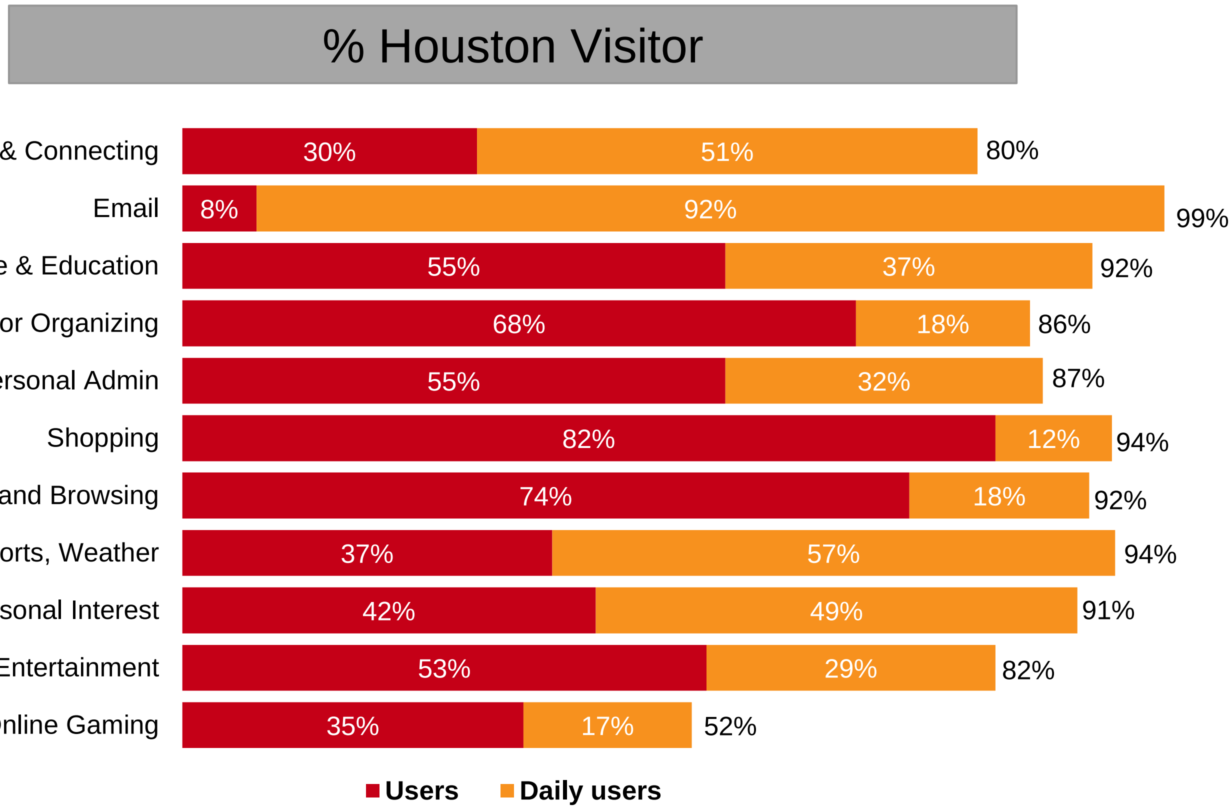
Communication has the highest weekly online consumption (6 hours), followed by entertainment (~5 hours) and information (~4 hours).



Source: US Digital Life General Report (2011). Means include zero.

Digital Activity Usage – Total Leisure Travelers

People use the internet for a variety of things, but only email gets used daily by nearly everyone. News/sports/weather ranks second for daily usage. Almost all shop online, but few do it daily.



DL4. FOR LEISURE PURPOSES: How frequently do you typically engage in each of these internet activities via a PC, laptop, or notebook (this could be at home, school, library, or an internet café) or via a mobile device (Smart phone, etc.)?

The Digital Lifestyles

In

INFLUENCERS

The Internet is an integral part of my life. I'm young and a big mobile Internet user and generally access everywhere, all of the time. I'm a blogger, and a passionate social networker. I'm also a big online shopper, even via my mobile. I want to make sure as many people as possible hear my online voice.

Co

COMMUNICATORS

I just love talking and expressing myself, whether that's face to face, on a fixed line, mobile or on social networking sites, instant messaging or just emailing people. I really want to express myself in the online world in the way that I can't in the offline one. I tend to be a smart phone user and I'm connecting online from my mobile, at home, at work or at college.

Kn

KNOWLEDGE-SEEKERS

I use the Internet to gain knowledge, information and to educate myself about the world. I'm not a big user of social networks but I do want to hear from like-minded people especially to help me make purchase decisions. I'm very interested in the latest thing.

Ne

NETWORKERS

The Internet is important for me to establish and maintain relationships. I have a busy life whether it's my profession or managing the home. I use things like social networking to keep in touch with people I wouldn't have time to otherwise. I'm a big home Internet home user and I'm very open to talking to brands and looking for promotions. That said I'm not really the kind of person to voice my opinions online.

As

ASPIRERS

I'm looking to create a personal space online. I'm very new to the Internet and I'm accessing via mobile and Internet cafes but mostly from home. I'm not doing a great deal at the moment online but I'm desperate to do more of everything, especially from a mobile device.

Fu

FUNCTIONALS

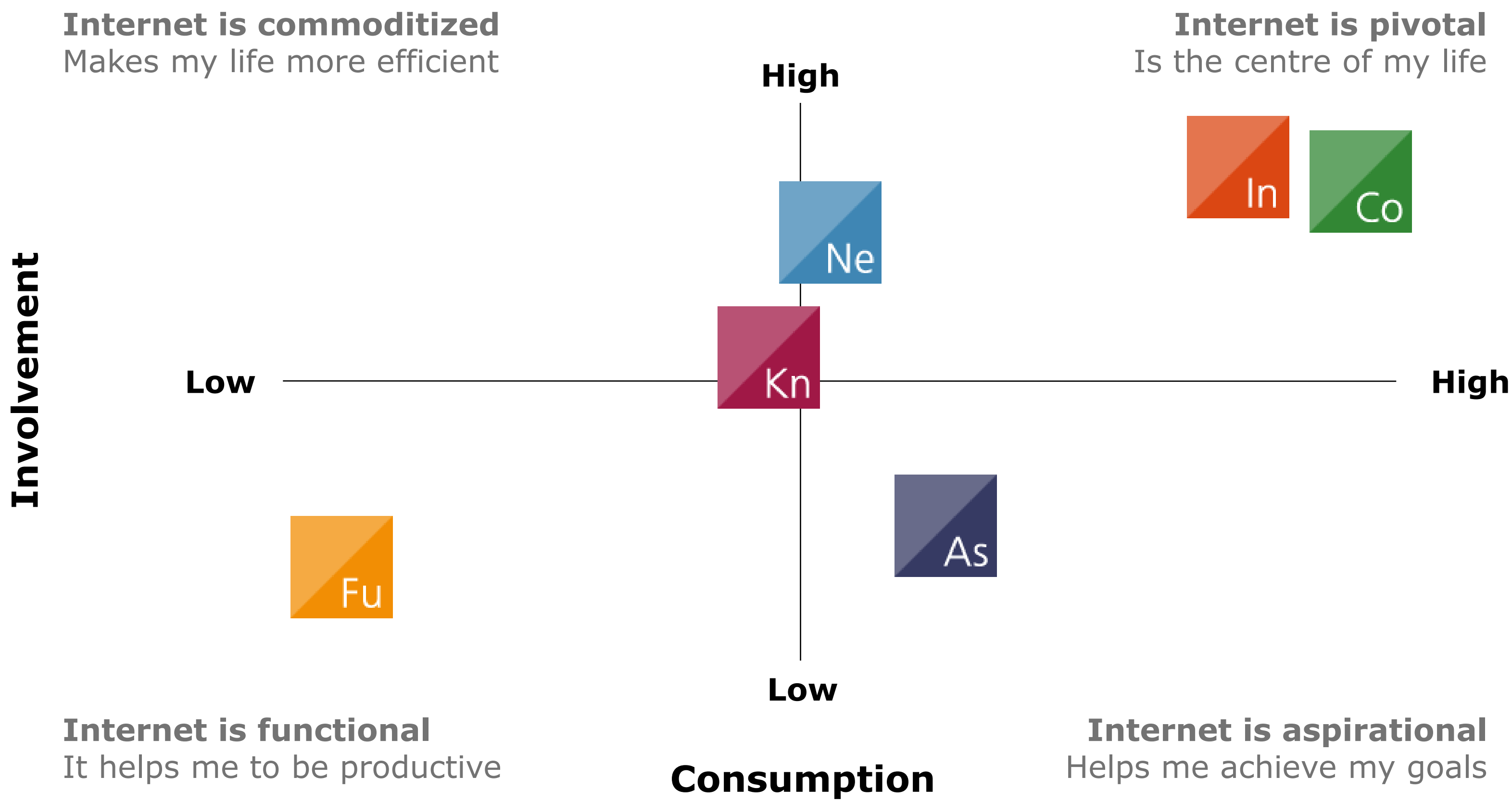
The Internet is a functional tool, I don't want to express myself online. I like emailing, checking the news, sport & weather but also online shopping. I'm really not interested in running my social life online and I am worried about data privacy and security. I am older and have been using the Internet for a long time.

Source: US Digital Life General Report

TNS

Digital usage by lifestyle

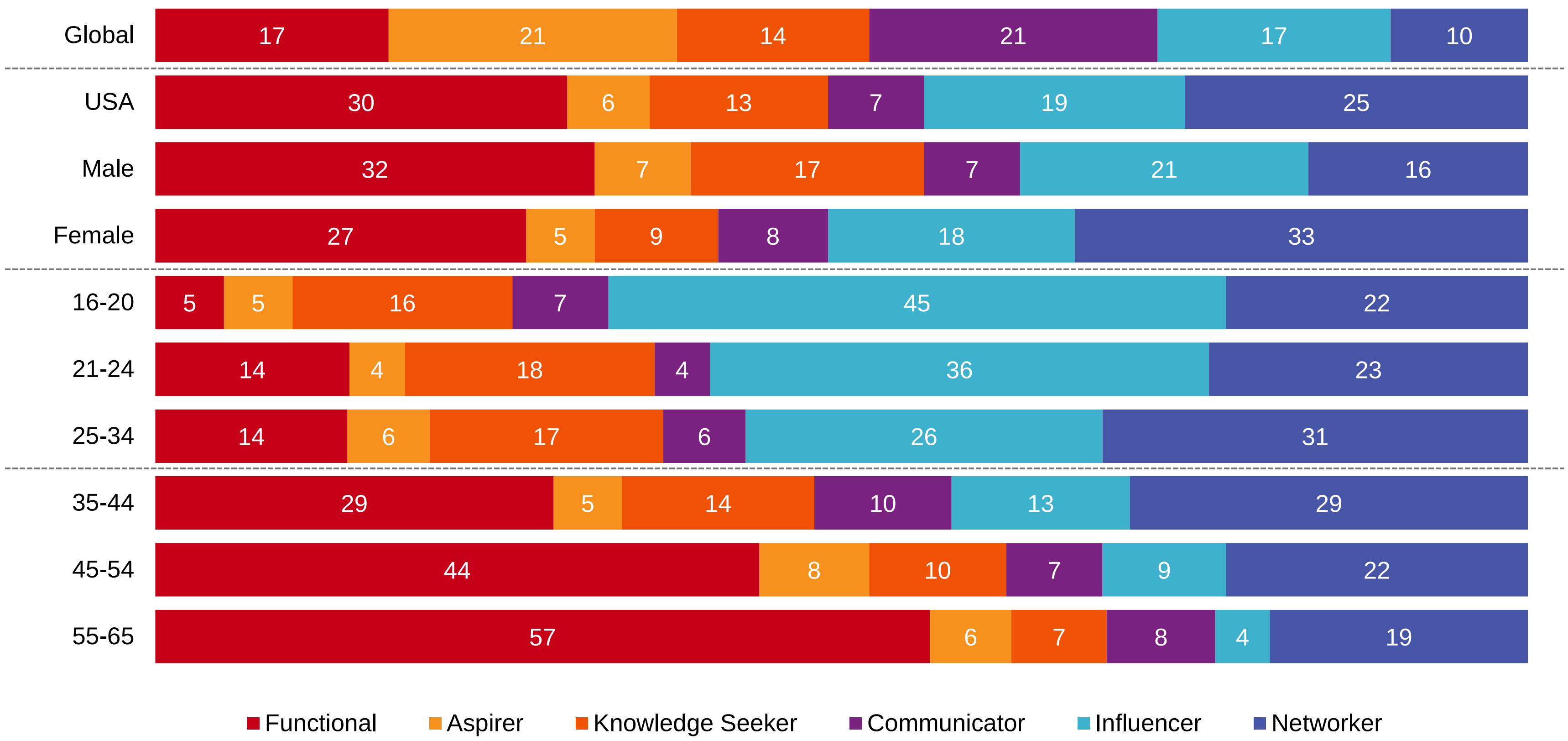
Digital media plays a vital role in the lifestyle of Influencers and Communicators; it makes a good platform from which to disseminate their views.



Source: US Digital Life General Report

Digital lifestyle by age

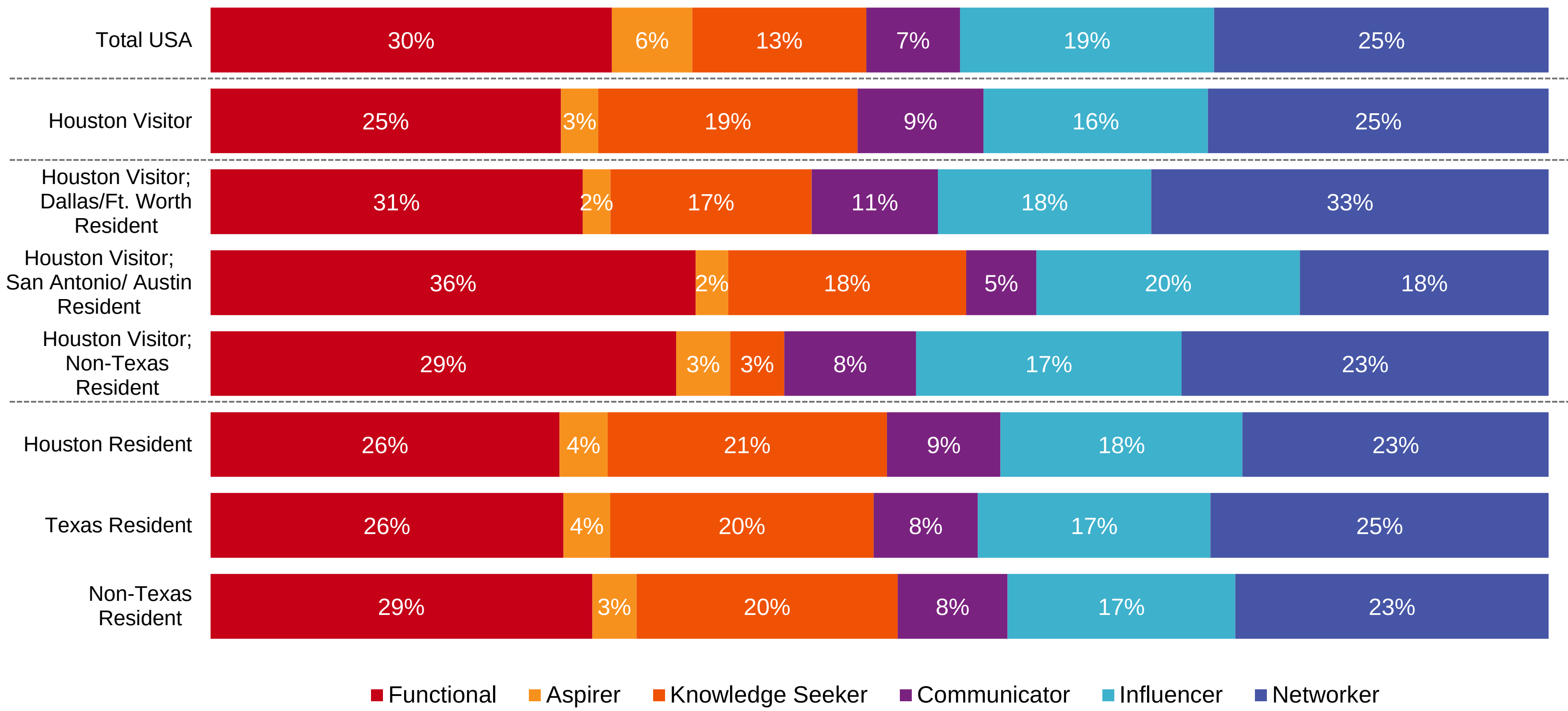
Functional use dominates after age 40. Compared to the rest of the world, the US has a large base of Functionals, especially in the mature market; the youth has a larger share of Influencers.



Source: US Digital Life General Report

Digital lifestyle by Houston groups

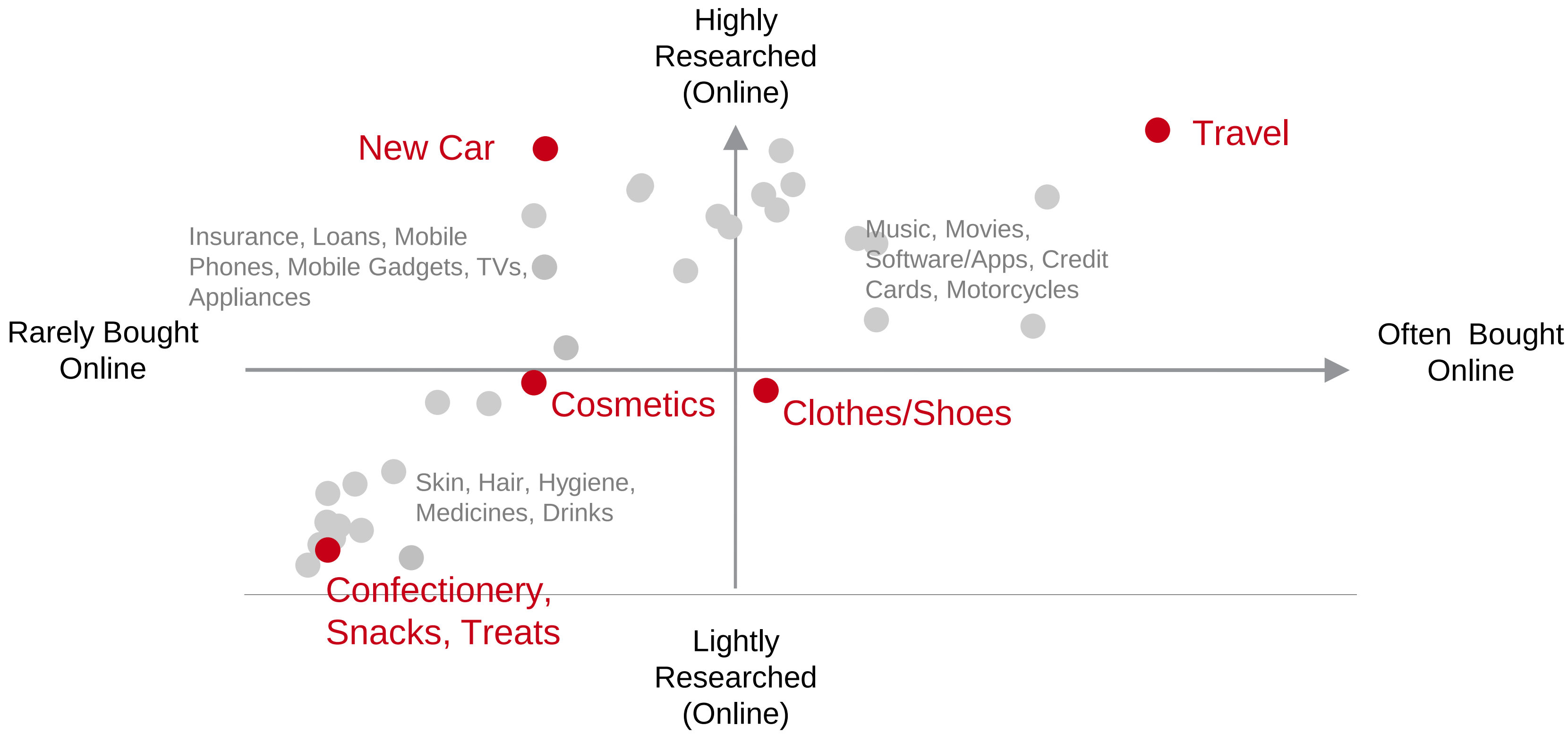
Houston visitors split evenly between Functionals and Networkers and also appeals to Knowledge Seekers.



Source: US Digital Life General Report and Palm Beach Digital Life Segmentation

Online relevance for purchases

Travel decisions and purchases both heavily depend upon online resources.



Source: US Digital Life General Report

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Appendix IIh: Final Comments

Comments regarding Houston

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

Common comments regarding Houston: 2013

Negative	Positive
"Confusing, terrible traffic/road construction/poor signage"	"Whole other world in the heart of Texas, absolutely worth the trip"
"Horrible, horrifying traffic and drivers (maniacs); confusing interstates"	"If you can't find something to do in Houston, then you don't want to!"
"Dirty, NOT and MUGGY (and I live in Florida)"	"Under-rated as a great destination – tunnels, restaurants, parks, train to museum district are great; need to play up the bayou more"
"Hot, muggy, smells from the oil"	"Good culturally, fine zoo, museums; great museums; my favorite zoo"
"Easy Pass personnel suck"	"The food –WOW – food BBQ, seafood, gourmet, and more"
"HOT! Avoid it in the summer"	"Love Houston … Dome, football, baseball, basketball, soccer, ballet, theater, opera, great restaurants, nice hotels, shopping, musicals, concerts, museums, children's museum, nightlife, comedy, NASA, Galveston, Hill Country"
"Too hot or rainy; humid/awful humidity; hot, humid hell on earth"	"Great Arts!"
"Mini-Mexico – dangerous; unfriendly/dangerous"	"Should emphasize outdoor activities – kayaking, hiking, golf, tennis, etc."
"Like any other big city – heavy traffic, noisy, polluted; prefer countryside"	"Big city, much to do, helpful people – I'm disabled, they're very thoughtful"
"Full of rude, incompetent people/drivers can't read or obey traffic signs"	"Love the commercials (my favorite bands) –just wonderful and really express Houston's diversity"
"Huge city – overwhelming to figure out what to do"	"I love the commercials; Houston will be on my list of upcoming travels"
"Like going to Grandma's house (have family in Houston), except while Grandma sleeps, Houston rocks!!"	"No shortage of amazing places to eat, unique places to shop, soak in art and culture. Relaxing, educational, fun place – like LA and NY"
"Too spread out for walking tours/not pedestrian-friendly"	"Warm, friendly place – for families, couples, friends, safe to go alone"
"Needs mass transit/public transportation; especially IAH to downtown"	"Beautiful city"
"I feel for homeless, but being accosted at every light=less likely to return"	"Great music scene"
"Strange ad tagline – 100 ways to save Houston – save from what … sounds like it's dying; what about 'savor' rather than save?"	"Has a lot to offer for good prices"
	"Houston doesn't get recognition it deserves for arts/culinary/fashion fun."
	"If you stay off the main highways, many neighborhoods are so interesting"

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

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Appendix IIi: Research Purposes and Methods

Introduction and purposes of research

TNS is pleased to present the fifth TravelsAmerica report for the Greater Houston Convention & Visitors Bureau (CVB). Conducted continuously throughout the year as a nationwide syndication by TNS, this online (data collection) project 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.

In addition, a separate follow-up survey of Houston visitors measures the "whys behind visitation," advertising effectiveness/ROI, and web usability such as:

- Important aspects of choosing a destination and travel planning and booking
- Perceptions, motivators, and interest in Houston vs. competitors
- Media usage
- Awareness, recall, and influence of ads
- Impact of website on brand, affinity, and purchase intent.

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).**

Research methods

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 2009 through 2012, respondents (does not include others in travel party) for Houston and total are shown below.

CY 2009 #of Travelers (Unweighted)	CY 2009 # of Travelers (Weighted)	CY 2010 #of Travelers (Unweighted)	CY 2010 # of Travelers (Weighted)	CY 2011 #of Travelers (Unweighted)	CY 2011 # of Travelers (Weighted)	CY 2012 #of Travelers (Unweighted)	CY 2012 # of Travelers (Weighted)	Region
760	784	666	721	654	822	682	796	Houston Visitors
74,203	73,910	74,413	75,741	64,155	75,168	72,693	70,811	Total for Travels America

Research methods continued

For the follow up survey, three groups who had completed the TravelsAmerica study in 2008-2012 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 27-July 9, 2013, similar to prior years (June 28-July 5, 2012, May 16-26, 2011, and June 16-28 in 2010).

# of Respondents 2010	# of Respondents 2011	# of Respondents 2012	# of Respondents 2013	Sample Group
471	404	270	372	Past Year Overnight Leisure Visitors (subset of total)
373	296	299	378	Houston Residents
664	829	397	505	Texas Residents Outside Of Houston
143	109	100	120	Non-Texas Residents Who Have Visited Houston
1,180	1,234	796	1,003	Total

TNS

Thank you