

# **Understanding the Emerging Market Visitor Perceptions and Needs**

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# International Marketing

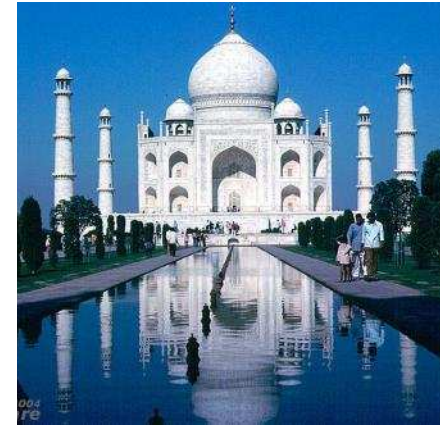
- **We need to understand needs and behaviors to effectively create demand**
- **Significant new international research and analysis has been done to clearly define:**
  - Who is our customer
  - How do they feel about San Francisco
  - What drives their decision to visit
  - What do they do while they are here
- **Information is from Destination Analysts:**
  - International Visitor Study 2014
    - 3Qs of data; still directional
  - State of the International Traveler 2014
- **With this understanding we can more clearly define a high ROI approach to these markets**

# San Francisco Emerging Markets

Our Focus



# Traveler Demographics



- Emerging market travelers tend to be slightly younger than the average international visitor
- Brazil and India are more likely to be here on business
- As a result, Brazil and India have higher mix of Male visitors than the average

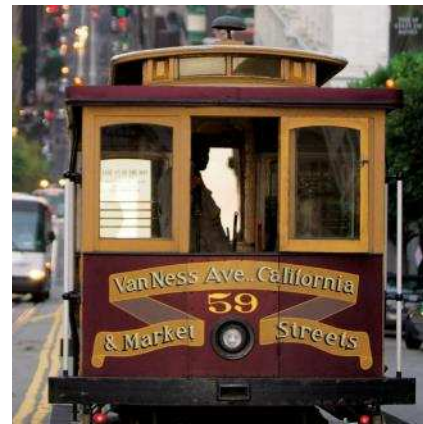
# International Traveler Demos

	Intl	Brazil	China	India
Male	55%	<b>60%</b>	57%	<b>80%</b>
Age	39	<b>37</b>	<b>35</b>	<b>38</b>
Marital Status:				
Married/Dom Partner	59%	58%	50%	68%
Single	34%	34%	42%	25%
Kids, 18	18%	19%	21%	19%
People in Hotel/Rental	2.2	2.2	2.1	1.8
Reasons:				
Vacation	65%	62%	55%	42%
Convention/Group	10%	<b>21%</b>	5%	<b>11%</b>
Business	13%	<b>11%</b>	13%	<b>34%</b>

# Overall Appeal of San Francisco

	Appealing	Very Appealing	Top 3 Boxes
New York	28%	36%	81%
Hawaii	30%	36%	80%
<b>San Francisco</b>	<b>34%</b>	<b>28%</b>	<b>80%</b>
Los Angeles	32%	28%	79%
Washington DC	29%	23%	72%

High Levels of Appeal as a Destination



China 87%  
Brazil 84%  
India 84%

# Likelihood To Visit

	Likelihood to Visit - 5 Yrs		Likelihood to Visit - 5 Yrs
New York	56%	China	<b>57%</b>
Los Angeles	47%	India	<b>55%</b>
San Francisco	<b>42%</b>	Brazil	<b>47%</b>
Hawaii	38%		
Washington DC	38%		
Miami	34%		

High Appeal Leads to High Likelihood to Visit



Emerging Markets Are Especially High

## Destination Choice Drivers

	Intl	Brazil	China	India
<b>Ambiance and atmosphere</b>	55%	46%	43%	53%
<b>Scenic Beauty</b>	47%	37%	43%	47%
<b>Attractions (incl Beyond)</b>	35%	31%	26%	29%
<b>Weather</b>	25%	14%	<b>47%</b>	<b>43%</b>
Restaurants and cuisine	25%	14%	37%	35%
Lifelong desire to visit SF	24%	20%	9%	10%
Shopping	23%	17%	28%	28%
Family in the area	20%	14%	29%	30%
Special Events	13%	28%	7%	16%
Museums/theatre/arts	12%	15%	22%	15%
Social diversity	8%	11%	9%	8%



# International Activities

		Intl	Brazil	China	India
	Golden Gate Bridge	63%	68%	48%	78%
	Pier 39	55%	67%	28%	58%
	Golden Gate Park	41%	60%	27%	43%
	Lombard Street	30%	36%	10%	24%
	Alcatraz	26%	34%	10%	28%
	Sausalito	22%	34%	6%	18%
	Ghirdelli Square	22%	33%	7%	31%
	Ferry Building	19%	21%	6%	17%
	Yosemite	16%	8%	10%	13%
	City Hall	15%	25%	19%	19%
	Napa/Sonoma	12%	17%	7%	15%
	Presidio	12%	22%	4%	6%
	Carmel/Monterey/Big Sur	10%	18%	4%	6%
	California Academy of Sciences	9%	31%	4%	7%

**Brazilian's Over-Index on Visiting All Top Sites**

**Chinese Tend to Visit Only the Major Sites**

**Indians More Like Brazilians**

## Neighborhoods Visited

		Intl	Brazil	China	India
	Fisherman's Wharf	54%	61%	40%	47%
	Union Square	53%	74%	32%	45%
	Chinatown	43%	57%	30%	34%
	Embarcadero	32%	43%	11%	30%
	Civic Center	20%	32%	13%	16%
	North Beach	18%	26%	8%	13%
	Marina/Presidio	18%	31%	4%	11%
	Mission	17%	23%	9%	14%
	Bayview	16%	25%	19%	28%
	Haight Ashbury	15%	21%	5%	3%
	Castro	14%	14%	7%	10%
	SOMA/ Yerba Buena/ Moscone	14%	26%	6%	19%
	Japantown	12%	17%	12%	6%
	Fillmore Street	11%	9%	8%	11%

Brazilians Tend to Visit Many Neighborhoods

Chinese Tend to Visit Only a Few Neighborhoods

Indians In The Middle

# Trip Planning Resources

	Intl	Brazil	China	India
Online Travel Agencies	34%	40%	25%	33%
Opinions of Friends/Relatives	20%	26%	19%	25%
User-Generated/Trip Advisor	18%	25%	10%	17%
Traditional Travel Agency	16%	21%	11%	13%
Commercial Guide Books	13%	13%	7%	1%
Info Gathered on Cell	10%	12%	8%	11%
Free Travel Guide Books	8%	12%	7%	6%
SF Travel Website	6%	8%	3%	5%
Facebook	4%	5%	5%	2%
YouTube	3%	4%	3%	0%
SF Travel Publications	3%	3%	3%	4%

**Digital Channels Increasingly Important in Trip Planning**

**Importance of Friends/Relative is also key**

**Brazil is Especially Tech Focused**

## Strategy for International Marketing

International web sites to improve awareness

PR and Social media to connect and engage

Promotions with key trade partners to drive conversion

- **Prioritize top growth countries for investment**
- **Create revenue streams to fund investments**
  - Websites advertising and booking.com revenue
  - New Strategic Alliance partners with common goals
- **Clearly define consumer targets and needs within each country**
- **Work with key partners to build and support marketing programs**
  - Brand USA and Visit California
  - Trade, Airlines, Strategic Alliances