

# Identifying Opportunities Among Customer Segments and Markets (Domestic Visitors Only)

Prepared by American Express Information Insights

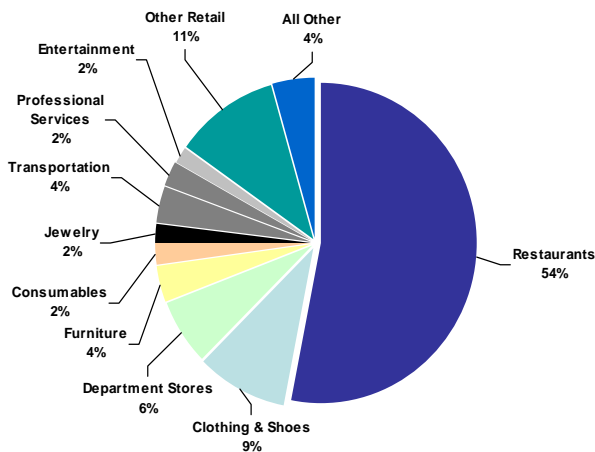
## Goals of the analysis

- Provide an overall picture of the inbound activity in San Francisco – including trends over time across different types of visitors (leisure / business)
- Identify population segments with the highest affinity for San Francisco and provide detailed characteristics – including demographics, lifestyles and media preferences
  - Determine key domestic feeder markets for San Francisco
  - Understand the spend and travel activity in and out of San Francisco for visitors
  - Find opportunities to further engage visitors and enhance the inbound activity in San Francisco

## What we found

- San Francisco inbound spend growth dropped by 58.1% from +14.4% to -43.8%. This is driven by declines in the number of visitors, number of transactions made by visitors as well as transaction sizes
- Young urban singles form the key population segment with a special affinity for San Francisco. Catering to the specific lifestyles of such people (fine dining, spa, luxury apparel, wine, health & fitness) could therefore significantly enhance the inbound activity in San Francisco
- Restaurants form the bulk of the inbound spend activity within San Francisco and their share is growing even in this economy. Hence special emphasis should be laid in further promoting this industry. Restaurants represent 54% of total spending vs. an average of 13% when these cardmembers visit other markets.
- There is an opportunity to gain more leisure visitors from large cities in the

**Visitor Spend in San Francisco**



**Visitor Distribution by Life Stage**

