



# Lower Manhattan Hotel Guest Study

*Final Report*



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July 2008

## Introduction

The Alliance for Downtown New York engaged Audience Research & Analysis (ARA) to conduct a survey of guests who stayed in Lower Manhattan hotels. The purpose of the benchmark survey was to:

- Develop a visitor profile (geographic and demographic)
- Measure party size
- Determine trip purpose and length of stay
- Assess spending for goods and services during their stay
- Identify activities participated in and destinations visited
- Find out how they learned about the hotel, and why it was chosen
- Describe awareness and interest in Lower Manhattan attractions and amenities
- Establish whether visit was first time in New York City and if not, whether it was first stay in a Lower Manhattan hotel

## Methodology

Front desk personnel at Lower Manhattan hotels handed out questionnaires and postage-paid envelopes to hotel guests as part of their check-in procedure, and asked them to complete the questionnaire at the end of their visit. As an alternative, ARA provided a link for a web-based version of the questionnaire for those who preferred an online platform. To encourage cooperation, each respondent was offered a \$5 Starbucks Gift Card as a “thank you” gift when they returned the completed questionnaire to the front desk of their hotel. In addition, everyone who completed the questionnaire were invited to participate in a drawing to win one of three \$100 American Express Gift Cards.

In the first wave, questionnaires were distributed on two days, Monday, October 22, 2007 and Friday, October 26 (Mondays and Fridays were deemed to generally be the busiest check-in days). To boost the number of responses, we distributed additional questionnaires on Friday, November 9. A total of 256 questionnaires were collected.

In the second wave the survey distribution was expanded to seven days, from May 5<sup>th</sup> to May 11<sup>th</sup>. To control the distribution, the \$5 Starbucks gift cards were awarded by mail rather than handed out. To augment the low response rate, ARA subsequently stationed staff at the Millennium Hilton, Embassy Suites, and Marriott Financial Center for one day each during the week of May 19 to intercept guests who were checking out and asked them to complete the questionnaire.

With all approaches, a total of 263 questionnaires were collected in the second wave, bringing the overall samples size for the study to 515. The table below shows the number of questionnaires collected from each hotel, as well as those received in the mail or completed online.

<b>Number of Respondents By Hotel Number</b>	<b>Wave Two</b>	<b>Wave One</b>	<b>Total</b>
Millennium Hilton	57	115	172
Embassy Suites	55	45	100
Marriott Financial Center	36	55	91
Holiday Inn/Gild Hall	25	13	38
Wall Street Inn	11	8	19
Ritz Carlton	15	9	24
The Exchange Hotel	-	11	11
Hampton Inn	-	3	3
Best Western Seaport Inn	-	3	3
Online	4	-	4
By mail (hotel unspecified)*	53	1	54
<b>Total</b>	<b>256</b>	<b>263</b>	<b>519</b>

\* Includes questionnaires handed out during the first wave at the Best Western Seaport, Hampton Inn, and Exchange Hotel, none of which were collected at the front desk but may have been among those received in the mail.

## Findings

### Visitor Geography

More than three-quarters of the respondents, overall, were visiting from the U.S. outside the New York metropolitan area and nearly one out of five was an international traveler. One out of six business travelers were from other countries compared with more than one out of five leisure visitors.

<b>Geography</b>	<b>Percent</b>	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
New York Metropolitan Area		4.7	3.5	6.1
Other U.S.		77.0	74.3	80.1
International		18.1	22.2	13.9

\*Included UK (23 mentions), Canada (20), Germany (10), France and Italy (4 each), The Netherlands and Trinidad (3 each), Australia, Belgium, China, Japan, Mexico, Norway, and Sweden (2 each), Bermuda, Brazil, Denmark, Finland, Kuwait, Mexico, Japan, Kuwait, New Zealand, Peru, and South Africa (one each)

First-time visitors to New York City were three times as likely to be from other countries compared with those who had been here previously.

<b>Geography</b>	<b>Percent</b>	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
		<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both</b>
New York Metropolitan Area		0.0	5.4	2.3	7.4	8.6
Other U.S.		57.6	79.7	81.3	70.0	82.9
International (see note)		42.4	14.9	16.4	22.6	8.6
	<b>Mean</b>	<b>2.0</b>	<b>1.7</b>	<b>1.4</b>	<b>2.3</b>	<b>1.8</b>
	<b>Median</b>	<b>2.0</b>	<b>1.0</b>	<b>1.0</b>	<b>2.0</b>	<b>2.0</b>

\*Small sample size, results are directional

Note: When international visitors are analyzed by first-time or trip purpose, the resulting samples are directional only

Among U.S. visitors from outside the New York Metropolitan Area, the distribution was: 12 percent from the mid-Atlantic region other than the NY metro area (other NY, southern NJ, PA, DE), 12 percent each from Southeast states (FL, GA, MS, AL, TN), and the East Central states (MD, DC, VA, WV, NC, SC), ten percent each from New England (ME, NH, VT, MA CT other than Fairfield county), and North Central states (IL, NB, KS, MO), nine percent from the West Coast and beyond (CA, WA, OR, AK, HI), five percent from Great Lakes and nearby states (OH, MI, IN, KY), and eight percent from the remaining Central (WI, MN, ND, MT, SD, IA), South Central (TX, OK, LA, AR) and Mountain states (ID, NV, UT, NM, AR, CO, WY).

### First-time Versus Prior Visit to New York City

The vast majority of visitors had been to New York City previously, especially those traveling on business. The results were consistent across the two waves. For more than one in five leisure travelers, this was their first visit to New York City.

First Visit to New York City Percent	Total	Wave Two	Wave One
Yes	13.4	14.4	12.1
No	86.6	85.6	87.9

First Visit to New York City Percent	Total	Business	Leisure	Both*
Yes	13.4	7.8	21.8	11.4
No	86.6	↑92.2	78.2	88.6

\*Small sample size, results are directional

### Frequency of Visits

Among those who have been to New York City before, 85 percent visited at least once in the past 12 months. One-third visited five or more times.

Frequency of Visits to New York City in Past 12 Months – Among Prior Visitors Percent	Total	Wave 2	Wave 1
None	15.5	17.9	14.2
Once	15.7	18.3	12.8
2 to 4 times	34.9	33.5	36.1
5 or more times	33.9	30.3	37.0

Overall, the average number of visits in the past 12 months was 3.6. Among business visitors, the average was 4.3 compared with 2.5 among leisure travelers. Forty-three percent had visited the City more than five times.

Frequency of Visits to New York City in Past 12 Months – Among Prior Visitors Percent	Total	Business	Leisure	Both*
None	15.5	9.1	24.7	24.1
Once	15.7	10.3	25.3	10.3
2 to 4 times	34.9	37.5	32.0	27.6
5 or more times	33.9	43.1	18.0	37.9
<i>Mean</i>	<b>3.6</b>	<b>4.3</b>	<b>2.5</b>	<b>3.6</b>

\*Small sample size, results are directional

## Lodging Location in the City

One-half of those who had been to New York City in the past 12 months stayed in Lower Manhattan on their last visit.

<b>Part of New York City Stayed In – Among Prior Visitors</b> Percent	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Lower Manhattan	50.5	46.6	53.6
Elsewhere in Manhattan	43.8	46.6	41.9
Elsewhere in NYC/Other NYC borough*	3.0	1.2	4.5
Outside NYC**	2.7	5.6	4.5

\*Included Brooklyn, Brooklyn Marriott

\*\* Included Chappaqua, Hilton Woodbridge, Jersey City, New Jersey, Newport, North Jersey

## Purpose of Visit

Overall, more than half were visiting the City on business. Among first-time visitors, however, the majority were here for leisure purposes.

<b>Primary Purpose of Trip</b> Percent	<b>Total</b>	<b>First Visit to NYC*</b>	
		<b>Yes</b>	<b>No</b>
<b>Total</b>			
Business	↑54.8	31.9	58.3
Leisure	38.4	↑62.3	34.7
Both**	6.8	5.8	7.0
<b>Second Wave</b>			
Business	47.1	34.2	49.3
Leisure	40.7	55.3	38.2
Both	12.2	10.5	12.4
<b>First Wave</b>			
Business	62.6	29.0	67.3
Leisure	36.2	71.0	31.4
Both	1.2	0.0	1.3

\* Small sample size, results are directional rather than statistically significant. This caveat applies to all breakdowns of first-time visitors by first or second wave.

\*\* Listed as an option on second wave questionnaire only. In the first wave, there were only three respondents who noted their visit as both business and leisure.

Among business travelers, over six out of ten said their company had an office in Lower Manhattan.

<b>Company Has Office in Lower Manhattan – Among Business Travelers</b> Percent	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Yes	63.3	56.7	68.5
No	36.7	43.3	31.5

## Length of Stay

Overall, visitors stayed an average of 2.4 days – 2.3 days during the first wave and 2.6 days in the second wave. With an average of 3.1 nights, first-time visitors had the longest stays.

Number of Nights in New York City	Percent	Total	Wave Two	Wave One
1		30.1	28.1	32.3
2		33.1	34.6	31.5
3		19.0	17.5	20.6
4		9.2	6.5	12.1
5 or more		8.6	13.3	3.5
	<i>Mean</i>	<i>2.4</i>	<i>2.6</i>	<i>2.3</i>
	<i>Median</i>	<i>2.0</i>	<i>2.0</i>	<i>2.0</i>

Number of Nights in New York City	Percent	Purpose of Visit			First Visit to NYC	
		Business	Leisure	Both	Yes	No
	<i>Mean</i>	2.4	2.4	3.1	<i>3.1</i>	<i>2.3</i>
	<i>Median</i>	2.0	2.0	2.0	<i>3.0</i>	<i>2.0</i>

While, overall, more than one-third of visitors included a Saturday night in their stay, it was primarily leisure visitors who spent the weekend in New York.

Hotel Stay Included Saturday Night	Percent	Total	Purpose of Visit			First Visit to NYC	
			Business	Leisure	Both	Yes	No
<b>Total</b>							
Yes		35.0	12.9	↑66.8	33.3	60.9	31.2
No		65.0	87.1	33.2	66.7	39.1	68.8
<b>Second Wave</b>							
Yes		37.6	16.7	63.8	30.0	65.7	33.2
No		62.4	83.3	36.2	70.0	34.3	66.8
<b>First Wave</b>							
Yes		33.2	10.4	71.1		55.2	30.0
No		66.8	89.6	28.9		44.8	70.0

## Day Checked in at Hotel

A question was added in the second wave about the day the visitors checked in at the hotel. For business travelers, *Monday* was the busiest day, but many also checked in on *Sunday*, *Tuesday* and *Wednesday*. One-half of leisure visitors arrived on *Friday*, and one-quarter came on *Thursday*.

Day Checked in	Percent	Total	Business	Leisure	Both
Sunday		11.6	15.5	4.9	18.8
Monday		17.1	↑31.9	2.9	9.4
Tuesday		8.8	15.5	1.9	6.3
Wednesday		11.2	16.4	5.8	9.4
Thursday		16.3	6.9	24.3	25.0
Friday		24.7	3.4	↑48.5	25.0
Saturday		10.4	15.5	4.9	18.8

## Party Composition

From a statistical point of view, the overall mean party size was 2.0 people including 1.8 adults and 0.2 children under 18 years. More practically speaking, 93 percent of parties were adult-only, while seven percent included an average of 2.3 children. Leisure parties were larger on average, being comprised of 2.3 adults and 0.4 children for a total party size of 2.7 people. The mean business party size was 1.4 people. First-time visitors, while predominantly leisure travelers, had a mean party size of only 2.0 people

### Adults

Number of Adults in Visiting Party	Percent	Total	Wave Two	Wave One
1		54.0	46.9	61.5
2		34.3	36.0	32.4
3 or more		11.7	17.1	6.1
	<i>Mean</i>	<i>1.8</i>	<i>1.9</i>	<i>1.5</i>
	<i>Median</i>	<i>1.0</i>	<i>2.0</i>	<i>1.0</i>

Number of Adults in Visiting Party	Percent	First Visit to NYC		Purpose of Visit		
		Yes	No	Business	Leisure	Both*
1		35.3	56.9	82.7	15.3	48.5
2		44.1	32.7	11.4	65.8	33.3
3 or more		20.6	10.4	5.9	18.9	18.2
	<i>Mean</i>	<i>2.0</i>	<i>1.7</i>	<i>1.4</i>	<i>2.3</i>	<i>1.8</i>
	<i>Median</i>	<i>2.0</i>	<i>1.0</i>	<i>1.0</i>	<i>2.0</i>	<i>2.0</i>

\*Small sample size, results are directional.

**Children**

The vast majority, especially those here on business, were visiting without children under 18 years.

<b>Number of Children Under 18 in Visiting Party</b> Percent	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
0	<b>93.3</b>	92.2	94.4
1	3.0	3.5	2.4
2 or more	3.7	4.3	3.2
<i>Mean</i>	<b>0.2</b>	<b>0.2</b>	<b>0.1</b>
<i>Median</i>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>

<b>Number of Children Under 18 in Visiting Party</b> Percent	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
	<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both</b>
0	82.4	95.0	↑98.9	85.1	93.8
1	8.8	2.1	0.4	6.2	6.3
2 or more	8.8	2.9	0.7	8.7	0.0
<i>Mean</i>	<b>0.3</b>	<b>0.1</b>	<b>0.0</b>	<b>0.4</b>	<b>0.1</b>
<i>Median</i>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>

## Sources of Information

Respondents were asked how they heard about the hotel they stayed in. *Prior stays at the same hotel* edged out being *a member of its rewards program* and *my company's travel department*. But among business travelers, the *company's travel department* moved ahead of *stayed here before*. Leisure travelers, including those visiting New York for the first time, cited *online travel websites* more than any other source.

Sources of Information	Percent	Total	Wave Two	Wave One
Stayed here before*		28.9	23.6	34.5
Member of its rewards program		26.8	22.1	31.7
My company's travel department		26.2	24.3	28.2
Online travel website		21.9	25.9	17.9
Personal recommendation		15.5	17.5	13.5
Travel agent		4.5	4.2	4.8
Guide book		1.6	1.1	2.0
Saw an ad in a publication		0.6	0.4	0.8
Other*		9.9	10.3	9.5

\* Other included conference, client chose it for me, bride's family booked it, brand loyalty, Hotel Forums, Learning Tree, hotwire, meeting planners, read about it, someone suggested, walked by it. A complete list of other reasons is in the Appendix.

Sources of Information	Percent	First Visit to NYC		Purpose of Visit		
		Yes	No	Business	Leisure	Both
Stayed here before*		4.3*	32.7	<b>37.0</b>	20.3	14.3
Member of its rewards program		15.9	28.5	31.0	22.8	17.1
My company's travel department		11.6	28.5	<b>42.7</b>	3.6	22.9
Online travel website		<b>34.8</b>	20.0	9.6	<b>38.6</b>	25.7
Personal recommendation		17.4	15.2	13.2	17.8	22.9
Travel agent		5.8	4.3	5.3	3.6	2.9
Guide book		5.8	0.9	0.7	3.0	0.0
Saw an ad in a publication		2.9	0.2	0.4	1.0	0.0
Other		10.1	9.9	10.7	8.6	11.4

\* We surmise that these respondents meant they stayed at another property of the same hotel brand name

## Reasons to Stay in Lower Manhattan

Being *close to business clients*, especially for business visitors, was the leading reason to stay in Lower Manhattan.

<b>Reasons to Stay in Lower Manhattan</b> Percent	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Close to business clients	49.7	47.9	51.6
Room rate	25.4	27.4	23.4
Room availability	18.1	16.3	19.8
Close to attractions wanted to see	16.5	19.0	13.9
Near friends or relatives	9.5	10.3	8.7
Other	13.6	12.9	14.3

\*Other included conference was here, chosen by company/client, close to office, comfort/quality, redeem credit card points, child friendly, suites and beautiful location, stayed in Midtown last time wanted to experience Downtown, stayed a few days at Marriot Marquis wanted to change, close to Newark Airport, harbor view, close to colleges visiting/exam site/cousin's wedding, hotel's accommodations and services. A complete list of other reasons is in the Appendix.

Among leisure travelers, overall, *room rate* was the most important factor. First-time visitors, in particular, cited being *close to the attractions they wanted to see*.

<b>Reasons to Stay in Lower Manhattan</b> Percent	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
	<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both</b>
Close to business clients	21.7	54.0	<b>79.7</b>	7.1	51.4
Room rate	34.8	24.0	16.4	<b>37.1</b>	28.6
Room availability	23.2	17.3	12.8	25.9	14.3
Close to attractions wanted to see	<b>37.7</b>	13.2	5.3	31.0	25.7
Near friends or relatives	7.2	9.9	1.1	22.8	2.9
Other	17.4	13.0	9.3	17.8	25.7

## Activities in Lower Manhattan

### Shopping

Overall, 58 percent shopped for at least one type of merchandise in Lower Manhattan, but the incidence was much higher among leisure (74 percent) and first-time visitors (84 percent) than business travelers (45 percent). More than one-half of leisure visitors shopped for *apparel/clothing*, while fewer than three out of ten bought *souvenirs*. Among first-time visitors, however, *apparel/clothing* and *souvenirs* were closer in appeal.

<b>Types of Merchandise Shopped for in Lower Manhattan</b> Percent	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Apparel, clothing	38.2	40.2	36.1
Souvenirs	17.3	18.4	16.1
Accessories	14.5	16.5	12.4
Shoes, footwear	13.7	13.8	13.7
Books & music	11.0	11.5	10.4
Bath, beauty & cosmetics	10.8	13.4	8.0
Electronics	8.0	6.1	10.0
Jewelry, watches	7.3	6.5	8.0
Children's clothing & toys	5.1	5.7	4.4
Other*	4.1	5.0	3.2
None of the above	42.2	38.3	46.2

\* Food (six mentions), gifts (2), groceries (2), snacks, luggage, housewares, NY wine, wine (3), and paper products

<b>Types of Merchandise Shopped for in Lower Manhattan</b> Percent	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
	<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both</b>
Apparel, clothing	<b>56.5</b>	35.4	25.2	<b>54.4</b>	48.6
Souvenirs	<b>42.0</b>	13.4	9.0	28.2	22.9
Accessories	17.4	14.1	7.9	22.6	22.9
Shoes, footwear	21.7	12.5	9.4	20.5	11.4
Books & music	14.5	10.4	8.6	13.3	17.1
Bath, beauty & cosmetics	14.5	10.2	7.2	15.4	11.4
Electronics	8.7	7.9	7.6	8.2	8.6
Jewelry, watches	11.6	6.6	3.2	12.8	8.6
Children's clothing & toys	7.2	4.8	2.2	9.2	5.7
Other	5.8	3.9	4.7	4.1	0.0
None of the above	15.9	46.3	55.4	26.2	28.6

### *Visiting Historic and Cultural Attractions*

*Ground Zero* topped the list of Lower Manhattan historic sites and cultural attractions across all visitor segments, being especially popular among first-time and leisure visitors. Overall, nearly 90 percent of first-timers, 79 percent of leisure visitors, and 46 percent of business travelers visited at least one Lower Manhattan attraction. Historic Battery Park welcomed relatively more visitors in the spring (wave two) than the fall.

<b>Historic Sites and Cultural Attractions Visited in Lower Manhattan</b> Percent	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
World Trade Center Site (Ground Zero)	44.9	49.6	40.0
Battery Park and Castle Clinton	19.8	27.0	12.4
Statue of Liberty/Ellis Island	18.2	18.0	18.4
World Financial Center/Winter Garden	17.8	19.5	16.0
New York Stock Exchange	15.6	19.5	11.6
South Street Seaport Marketplace	15.6	16.8	14.4
Staten Island Ferry	11.5	11.7	11.2
Trinity Church	11.3	15.6	6.8
St. Paul's Chapel	9.9	14.5	5.2
South Street Seaport Museum	2.8	2.3	3.2
Museum of the American Indian	2.6	3.9	1.2
African Burial Ground	2.2	2.3	2.0
Museum of Jewish Heritage	1.8	2.3	1.2
Vietnam War Veterans Memorial	1.6	2.3	0.8
Federal Hall National Memorial	1.4	2.0	.8
Fraunces Tavern Museum	1.2	1.2	1.2
Police Museum	1.2	1.2	1.2
Skyscraper Museum	0.6	0.0	1.2
Other*	4.7	6.3	3.2
Did not visit Lower Manhattan attractions	39.3	30.1	48.8

\*Other included Brooklyn Bridge (three mentions), Irish Hunger Memorial (two mentions), "Bodies...The Exhibition," Century 21, Federal Reserve, and FRB New York Coin Exhibit (one mention each)

The World Trade Center site and Statue of Liberty/Ellis Island had above average appeal to first-time visitors.

Historic Sites and Cultural Attractions Visited in Lower Manhattan Percent	First Visit to NYC		Purpose of Visit		
	Yes	No	Business	Leisure	Both
World Trade Center Site (Ground Zero)	↑75.0	40.2	30.4	↑64.2	51.4
Battery Park and Castle Clinton	39.7	16.7	12.0	28.5	34.3
Statue of Liberty/Ellis Island	↑41.2	14.6	7.6	32.6	22.9
World Financial Center/Winter Garden	32.4	15.5	13.8	22.8	20.0
New York Stock Exchange	35.3	12.6	12.7	17.6	28.6
South Street Seaport Marketplace	16.2	15.5	12.3	19.2	22.9
Staten Island Ferry	22.1	9.8	3.6	21.2	20.0
Trinity Church	14.7	10.7	4.7	16.1	37.1
St. Paul's Chapel	19.1	8.4	4.7	15.5	20.0
South Street Seaport Museum	7.4	2.1	1.4	4.1	5.7
Museum of the American Indian	11.8	1.1	1.1	4.1	5.7
African Burial Ground	2.9	2.1	1.4	2.1	8.6
Museum of Jewish Heritage	1.5	1.8	0.4	3.6	2.9
Vietnam War Veterans Memorial	4.4	1.1	0.0	2.6	8.6
Federal Hall National Memorial	2.9	1.1	1.1	1.0	5.7
Fraunces Tavern Museum	1.5	1.1	0.7	1.6	2.9
Police Museum	4.4	.7	0.7	2.1	0.0
Skyscraper Museum	4.4	0.0	0.4	1.0	0.0
Other	4.4	4.8	2.5	7.8	5.7
Did not visit Lower Manhattan attractions	10.3	43.8	54.0	21.2	22.9

### Other New York City Attraction or Activities

In addition to visiting historic sites and cultural attractions in Lower Manhattan, one-half of Downtown hotel guests, overall, participated in other activities in the City. Among the most popular were visiting *landmarks*, attending *live theatre*, and visiting a *museum or art gallery*.

Other New York City Attractions	Percent	Total	Wave Two	Wave One
Landmarks (e.g., Empire State, Rockefeller Center)		24.3	21.1	27.6
Live theatre		23.5	21.1	25.9
Museum or art gallery		20.0	18.6	21.3
Dance venue, lounge or cabaret		6.7	6.2	7.1
Guided tour or sightseeing bus		6.7	5.4	7.9
Performing arts		5.2	5.0	5.4
Live music concert		4.0	3.7	4.2
Did not visit any attractions		50.7	55.8	45.6

Among leisure visitors, overall, almost four out of ten visited a *museum or art gallery*, while almost six out of ten first-time visitors went to NYC *landmarks*. Three out of four business visitors did not visit any attractions.

Other New York City Attractions	Percent	First Visit to NYC		Purpose of Visit		
		Yes	No	Business	Leisure	Both*
Landmarks (e.g., Empire State, Rockefeller Center)		↑56.5	19.6	10.3	42.7	34.4
Live theatre		30.6	22.4	10.7	38.9	40.6
Museum or art gallery		37.1	17.4	7.6	↑37.8	18.8
Dance venue, lounge or cabaret		9.7	6.2	3.8	11.4	3.1
Guided tour or sightseeing bus		24.2	4.1	1.5	11.9	18.8
Performing arts		6.5	5.0	1.9	9.7	3.1
Live music concert		1.6	4.3	1.1	5.9	15.6
Did not visit any attractions		17.7	55.6	<b>75.2</b>	19.5	31.3

\*Small sample size, results are directional

## Dining Out

Downtown hotel guests dined out an average of 2.8 times in Lower Manhattan. Both business travelers and first-time visitors dined out more frequently in Lower Manhattan. On average, 89 percent dined out in Lower Manhattan.<sup>1</sup>

Frequency of Dining Out in Restaurants in Lower Manhattan	Percent	Total	Wave Two	Wave One
0		10.7	9.8	11.8
1		19.8	17.6	22.4
2		25.2	26.2	24.1
3		19.0	20.3	17.5
4		8.4	9.8	6.6
5 or more		16.9	16.4	17.6
	<i>Mean</i>	<b>2.8</b>	<b>2.9</b>	<b>2.7</b>
	<i>Median</i>	<b>2.0</b>	<b>2.0</b>	<b>2.0</b>

Frequency of Dining Out in Restaurants in Lower Manhattan	Percent	First Visit to NYC		Purpose of Visit		
		Yes	No	Business	Leisure	Both*
<i>Mean</i>		<b>↑3.2</b>	<b>2.8</b>	<b>↑3.0</b>	<b>2.4</b>	<b>3.6</b>
<i>Median</i>		<b>3.0</b>	<b>2.0</b>	<b>2.0</b>	<b>2.0</b>	<b>3.0</b>

\*Small sample size, results are directional

Overall, Downtown hotel guests dined out 1.9 times elsewhere in New York City. Leisure visitors had the highest incidence of dining out outside of Lower Manhattan. On average, 59 percent dined out elsewhere in New York City. Based on the incidence and frequency of dining out in Lower Manhattan and elsewhere in the City, 69 percent of total dining took place in Lower Manhattan.

Frequency of Dining Out in Restaurants Elsewhere in New York City	Percent	Total	Wave Two	Wave One
0		41.3	38.7	44.3
1		15.7	19.5	11.4
2		15.7	16.0	15.4
3		10.5	7.4	14.0
4		6.6	7.4	5.7
5		10.2	10.9	9.2
	<i>Mean</i>	<b>1.9</b>	<b>1.9</b>	<b>1.9</b>
	<i>Median</i>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>

Frequency of Dining Out in Restaurants Elsewhere in New York City	Percent	First Visit to NYC		Purpose of Visit		
		Yes	No	Business	Leisure	Both*
<i>Mean</i>		<b>2.5</b>	<b>1.8</b>	<b>1.4</b>	<b>2.4</b>	<b>3.3</b>
<i>Median</i>		<b>2.0</b>	<b>1.0</b>	<b>0.0</b>	<b>2.0</b>	<b>2.0</b>

\*Small sample size, results are directional

<sup>1</sup> Of the 11 percent who did not dine out in Lower Manhattan, 96 percent dined out elsewhere in New York City.

## Spending

Other than for their *hotel, restaurants* and *taxis* were the two categories where visitors were most likely to incur expenditures. Almost one-half spent money *shopping*, nearly 40 percent bought beverages at *bars or lounges*, and three out of ten purchased *tickets or admissions*.

Categories of Visitor Spending	Percent	Total	Wave Two	Wave One
Restaurant meals or snacks		87.8	94.3	81.0
Hotel		85.8	87.8	83.7
Taxi/Car service		78.3	82.1	74.2
Subway/city bus		50.3	54.8	45.6
Shopping (for yourself and gifts)		49.7	56.7	42.5
Bars or lounges		37.5	40.7	34.1
Tickets/admissions (museums, theatre, concerts)		29.1	35.0	23.0
Sightseeing (bus tours, attractions)		13.8	17.1	10.3
Personal services (beauty, spa)		5.2	4.9	5.6
Other		3.3	4.6	2.0

First-time and leisure visitors had the highest incidence of paying for the *subway or buses, shopping, admissions* and *sightseeing*. Business travelers had a higher relative incidence of using taxis.

Categories of Visitor Spending	Percent	First Visit to NYC		Purpose of Visit		
		Yes	No	Business	Leisure	Both*
Restaurant meals or snacks		85.5	88.1	86.1	88.8	97.1
Hotel		79.7	86.8	88.6	81.2	88.6
Taxi/Car service		75.4	78.7	<b>81.9</b>	73.1	80.0
Subway/city bus		<b>63.8</b>	48.2	38.4	<b>62.9</b>	71.4
Shopping (for yourself and gifts)		<b>65.2</b>	47.3	35.9	<b>66.0</b>	68.6
Bars or lounges		37.7	37.4	36.7	38.1	40.0
Tickets/admissions (museums, theatre, concerts)		<b>49.3</b>	26.0	12.1	<b>50.3</b>	45.7
Sightseeing (bus tours, attractions)		<b>33.3</b>	10.8	3.2	<b>25.9</b>	31.4
Personal services (beauty, spa)		5.8	5.2	3.6	6.6	8.6
Other		4.3	3.1	1.8	4.6	8.6

\*Small sample size, results are directional

## Amount Spent

Mean total spending amounted to \$2,674. This figure included spending for the entire travel party. The largest single category of expenditures was for the *hotel*, followed by *shopping*, and *restaurant meals and snacks*. Mean total spending of first-time visitors was highest at \$3,606, followed by leisure travelers, overall, at \$2,935. First-timers, many of whom were international visitors, stayed long and had higher hotel expenditures.

Average Amount Spent Dollars	Total	Wave Two	Wave One
Hotel	1,058	1,154	943
Shopping (for yourself and gifts)	389	329	475
Restaurant meals or snacks	340	375	293
Tickets/admission (museums, theatre, concerts)	190	197	178
Bars or lounges	160	145	179
Taxi/Car service	127	136	115
Sightseeing (bus tours, attractions)	108	120	89
Personal services (beauty, spa)	97	90	104
Subway/city bus	25	28	21
Other*	180	207	114
<b>Total Spending</b>	<b>\$2,674</b>	<b>\$2,781</b>	<b>\$2,511</b>

\* Other included parking/parking tip (seven mentions), Yankees game (three mentions), Rangers game (two mentions), special liquors (one mention)

Average Amount Spent Dollars	First Visit to NYC		Purpose of Visit		
	Yes	No	Business	Leisure	Both*
Hotel	1,402	1,008	1,069	1,011	1,233
Shopping (for yourself and gifts)	<b>460</b>	373	285	<b>466</b>	377
Restaurant meals or snacks	349	338	263	<b>409</b>	537
Tickets/admission (museums, theatre, concerts)	179	193	130	208	205
Bars or lounges	162	160	125	218	106
Taxi/Car service	224	112	119	141	123
Sightseeing (bus tours, attractions)	110	107	109	107	116
Personal services (beauty, spa)	89	99	48	115	200
Subway/city bus	31	24	17	32	27
Other	600	90	63	228	230
<b>Total Spending</b>	<b>\$3,606</b>	<b>\$2,504</b>	<b>\$2,228</b>	<b>\$2,935</b>	<b>\$3,154</b>

\*Small sample size, results are directional.

Leisure visitors, who were the most likely to dine out outside of Lower Manhattan, spent the most on *restaurant meals* on average. First-timers, as well as leisure visitors, also reported higher spending for *shopping*.

### Intent to Stay in Lower Manhattan During Next Visit to New York City

Overall, 56 percent said they were *very* likely to stay in Lower Manhattan the next time they visited New York City, while another 30 percent were *somewhat* likely. Business visitors were the most likely to stay in Lower Manhattan on their next visit.

Likelihood to Stay in Lower Manhattan Percent	Total	Wave Two	Wave One
Very likely	56.3	57.6	56.3
Somewhat likely	29.6	29.8	29.6
Somewhat unlikely	8.9	7.6	8.9
Very unlikely	5.3	5.0	5.3

Likelihood to Stay in Lower Manhattan Percent	First Visit to NYC		Purpose of Visit		
	Yes	No	Business	Leisure	Both*
Very likely	55.2	57.2	<b>65.5</b>	46.4	51.4
Somewhat likely	28.4	29.9	21.9	40.2	31.4
Somewhat unlikely	7.5	8.4	7.6	8.2	14.3
Very unlikely	9.0	4.5	5.0	5.2	2.9

\* Small sample size, results are directional

Respondents were encouraged to explain why they were “likely” or “unlikely” to stay in Lower Manhattan the next time they visited. Overall, the positives outweighed negatives. Among those likely to stay, many cited *business reasons* such as being near their New York office or clients, and *convenience of location*. Others *liked their hotel*, its service and location. Several mentioned *reasonable rates* while a few preferred to be *away from the hustle and bustle* of places like Times Square. There were also mentions of *friends/relatives live here*, and *easy access to subways*. Those not likely to return often complained about the *construction with its noise and street closings*, and being *too far from midtown attractions*. The full list of verbatim responses appears in the appendix to this report.

## Demographics

Including business travelers, 58 percent were male and 42 percent were female. Excluding them, however, reversed the gender distribution to 54 percent female and 46 percent male.

<b>Gender</b>	<b>Percent</b>	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Male		57.6	59.8	55.4
Female		42.4	40.2	44.6

<b>Gender</b>	<b>Percent</b>	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
		<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both*</b>
Male		48.5	59.0	<b>67.6</b>	43.6	60.0
Female		51.5	41.0	32.4	56.4	40.0

\*Small sample size, results are directional

Overall, 83 percent were college graduates, including 49 percent who had an advanced degree.

<b>Highest Level of Education</b>	<b>Percent</b>	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Some HS		1.0	1.2	0.8
HS graduate		3.0	3.6	2.4
Some college		13.1	10.4	15.8
College graduate		34.3	32.5	36.0
Graduate or professional degree		48.6	52.2	44.9

<b>Highest Level of Education</b>	<b>Percent</b>	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
		<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both*</b>
Some HS		1.5	0.9	0.4	2.1	0.0
HS graduate		7.6	2.3	1.5	4.7	5.7
Some college		19.7	12.1	12.7	14.1	11.4
College graduate		25.8	35.6	36.7	30.2	40.0
Graduate or professional degree		45.5	49.1	<b>48.7</b>	49.0	42.9

\*Small sample size, results are directional

The vast majority were currently married or partnered. The highest percentage of single (never married) visitors was among leisure visitors.

<b>Marital Status</b>	<b>Percent</b>	<b>Total</b>	<b>Wave 2</b>	<b>Wave 1</b>
Single (never married)		20.2	20.3	20.2
Married or partnered		71.9	69.3	74.5
Separated/divorced/widowed		7.7	10.0	5.3

<b>Marital Status</b>	<b>Percent</b>	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
		<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both*</b>
Single (never married)		20.6	20.2	19.4	23.2	11.8
Married or partnered		70.6	72.1	72.8	70.5	70.6
Separated/divorced/widowed		8.8	7.5	0.4	6.3	17.6

\*Small sample size, results are directional

Although mean age differed little among visitor segments, business visitors had the most compact age distribution with 96 percent between 25 and 64 years. First-time visitors had the greatest percentage – 31 percent – under 35 years of age, while leisure visitors had the largest proportion, 27 percent, who were 55 years or older.

<b>Age</b>	<b>Percent</b>	<b>Total</b>	<b>Wave Twp</b>	<b>Wave One</b>
Under 25		4.5	3.1	6.1
25 to 34		17.8	17.2	18.3
35 or 44		25.8	25.7	26.0
45 to 54		30.8	29.5	32.1
55 to 64		16.6	19.2	13.8
65 to 74		3.9	4.2	3.7
Over 74		0.6	1.1	0.0
<b>Mean Age</b>		<b>44.7</b>	<b>45.7</b>	<b>43.6</b>

<b>Age</b>	<b>Percent</b>	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>		
		<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both*</b>
Under 25		7.4	4.1	2.5	8.2	0.0
25 to 34		23.5	16.9	16.3	20.0	17.1
35 or 44		26.5	25.7	26.4	24.1	31.4
45 to 54		29.4	31.0	38.4	21.0	25.7
55 to 64		10.3	17.5	14.9	18.5	17.1
65 to 74		2.9	4.1	1.1	7.2	8.6
Over 74		0.0	0.4	0.4	1.0	0.0
<b>Mean Age</b>		<b>41.7</b>	<b>45.2</b>	<b>44.7</b>	<b>44.3</b>	<b>46.4</b>

\*Small sample size, results are directional

With mean income exceeding \$200,000, Lower Manhattan visitors were financially upscale. This included business visitors, whose mean income exceeded \$240,000. First-timers, who were generally younger, earned the least, \$140,000 on average.

<b>Annual Household Income</b>	<b>Percent</b>	<b>Total</b>	<b>Wave Two</b>	<b>Wave One</b>
Less than \$50,000		6.1	5.0	7.3
\$50,000 to \$74,999		7.8	9.5	5.9
\$75,000 to \$99,999		13.9	14.0	14.2
\$100,000 to \$149,999		20.9	19.8	22.4
\$150,000 to \$199,999		18.3	16.9	19.6
\$200,000 to \$249,999		12.0	13.6	10.0
\$250,000 to \$299,999		6.5	6.2	6.8
\$300,000 or more		14.4	14.9	13.7
	<b>Mean Income (\$)</b>	<b>211,903</b>	<b>215,237</b>	<b>208,219</b>

<b>Annual Household Income</b>	<b>First Visit to NYC</b>		<b>Purpose of Visit</b>			
	<b>Yes</b>	<b>No</b>	<b>Business</b>	<b>Leisure</b>	<b>Both*</b>	
Less than \$50,000	9.8	5.5	3.6	10.2	3.2	
\$50,000 to \$74,999	13.1	7.0	6.0	11.3	3.2	
\$75,000 to \$99,999	19.7	13.3	10.8	18.1	16.1	
\$100,000 to \$149,999	27.9	20.0	21.9	19.8	19.4	
\$150,000 to \$199,999	13.1	19.0	16.7	19.8	22.6	
\$200,000 to \$249,999	6.6	12.8	14.3	9.0	9.7	
\$250,000 to \$299,999	6.6	6.5	8.0	4.5	6.5	
\$300,000 or more	3.3	16.0	18.7	7.3	19.4	
	<b>Mean Income (\$)</b>	<b>140,163</b>	<b>222,843</b>	<b>242,380</b>	<b>164,689</b>	<b>241,532</b>

\*Small sample size, results are directional



## Lower Manhattan Hotel Guest Study - 1st & 2nd Wave Summary

Visitor Geography	
NY Metropolitan area	4.7%
Other US - total	77.0%
International	18.0%

First Time v. Repeat Visitors	
First Time	13.4%
Visited Previously	86.6%

Primary Purpose of Visit	
Business	54.8%
Leisure	38.4%
Both	6.8%

Among previous visitors, frequency of visits in the past 12 months:	
None	15.5%
Once	15.7%
2 to 4 times	34.9%
5 or more times	33.9%

Lodging locations of those who visited New York in the past 12 months	
Lower Manhattan	50.5%
Elsewhere in Manhattan	43.8%
Elsewhere in NYC	3.0%

Party Information		
	Business travelers	Leisure travelers
Average length of stay in New York City (days)	2.6	2.4
Average number of adults in visiting party	1.4	2.3
Average number of children under 18 in party	0	0.4

Demographics		
	Business travelers	Leisure travelers
Male/female split	68% / 32%	44% / 56%

Educational attainment		
Graduate or professional degree	48.7%	49.0%
College graduate	36.7%	30.2%

Age	Average	45	44
Under 25	2.5%	8.2%	
25 to 34	16.3%	20.0%	
35 to 44	26.4%	24.1%	
45 to 54	38.4%	21.0%	
55 to 64	14.9%	18.5%	
65 to 74	1.1%	7.2%	
Average Hhld Income	\$242,380	\$164,689	

Guests' top reasons for staying in Lower Manhattan		
	Business travelers	Leisure travelers
Close to business clients	79.7%	7.1%
Room rate	16.4%	37.1%
Room availability	12.8%	25.9%
Close to attractions	5.3%	31.0%
Near friends or relatives	1.1%	22.8%

Top Lower Manhattan Historic and Cultural Attractions Visited		
	Business travelers	Leisure travelers
World Trade Center Site (Ground Zero)	30.4%	64.2%
Statue of Liberty/Ellis Island	7.6%	32.6%
World Financial Center/ Winter	13.8%	22.8%
South Street Seaport Marketplace	12.3%	19.2%
Battery Park and Castle Clinton	12.0%	28.5%

Frequency of Dining out			
	Travelers	travelers	Total
Average times dining out in Lower	1.4	2.4	89.3%
Average times dining out elsewhere in NYC	3	2.4	58.7%

Visitor Spending				
	Business travelers		Leisure travelers	
	Percent	Dollars	Percent	Dollars
Hotel	88.6%	\$1,069	81.20%	\$1,011
Restaurant Meals/Snacks	86.1%	\$263	88.8%	\$409
Taxi/Car Service	81.9%	\$119	73.1%	\$141
Subway/City Bus	38.4%	\$17	62.9%	\$32
Shopping	35.9%	\$285	66.0%	\$466
Bars or Lounges	36.7%	\$125	38.1%	\$218
Tickets/Admission	12.1%	\$130	50.3%	\$208
Sightseeing	3.2%	\$109	25.9%	\$107
Personal Services	3.6%	\$48	6.6%	\$115
Other	1.8%	\$63	4.6%	\$228
<b>TOTAL SPENDING</b>		<b>\$2,228</b>		<b>\$2,935</b>

The Alliance for Downtown New York commissioned a study of Lower Manhattan hotel guests in order to establish a profile of guests' activities, expenditures, and demographics. Audience Research and Analysis designed the survey and analyzed the results. The data for this study were gathered from guests at eight Lower Manhattan hotels during November 2007 and May 2008.