



WINTER HOTEL VISITORS

Report on Survey Findings

June 2006

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BACKGROUND

- Visitors made 3,935 reservations on gophila.com between November 1, 2005 and April 30, 2006, totaling 6,420 room nights. Hotel revenue came to \$932,456.23, at an average of \$145.24 per room night.
- Four packages were offered in Winter 2006: Ben's Birthday, Philly Overnight, Body Worlds and Philly Freedom. 2,157 packages were sold for a total revenue of \$551,945. This represents a drop of 71% from Winter 2005 hotel revenues.
- The average package price was \$235.42, an increase of 9.5% from Winter 2005. The average package covered 1.84 nights.

METHODOLOGY

- GPTMC emailed an invitation to take a survey to all winter hotel visitors who booked on Gophila.com.
- A total of 3,465 invitations were sent out, with 627 completed surveys received, for a response rate of 18%.
- As incentive, respondents were had a chance to win a \$300 American Express Gift Cheque.
- The error rate for survey findings is +/- 3.9% at 95% confidence. Percentages may total more or less than 100% due to rounding.
- This is the 5th consumer hotel survey GPTMC has conducted. Reports on our Summer '04, Winter '05, Summer '05 and Dali hotel package surveys are available at gophila.com/research. This report compares findings from Winter '05 to Winter '06. Questions not asked in 2005 are noted.

WINTER 2006 HOTEL VISITOR PROFILE

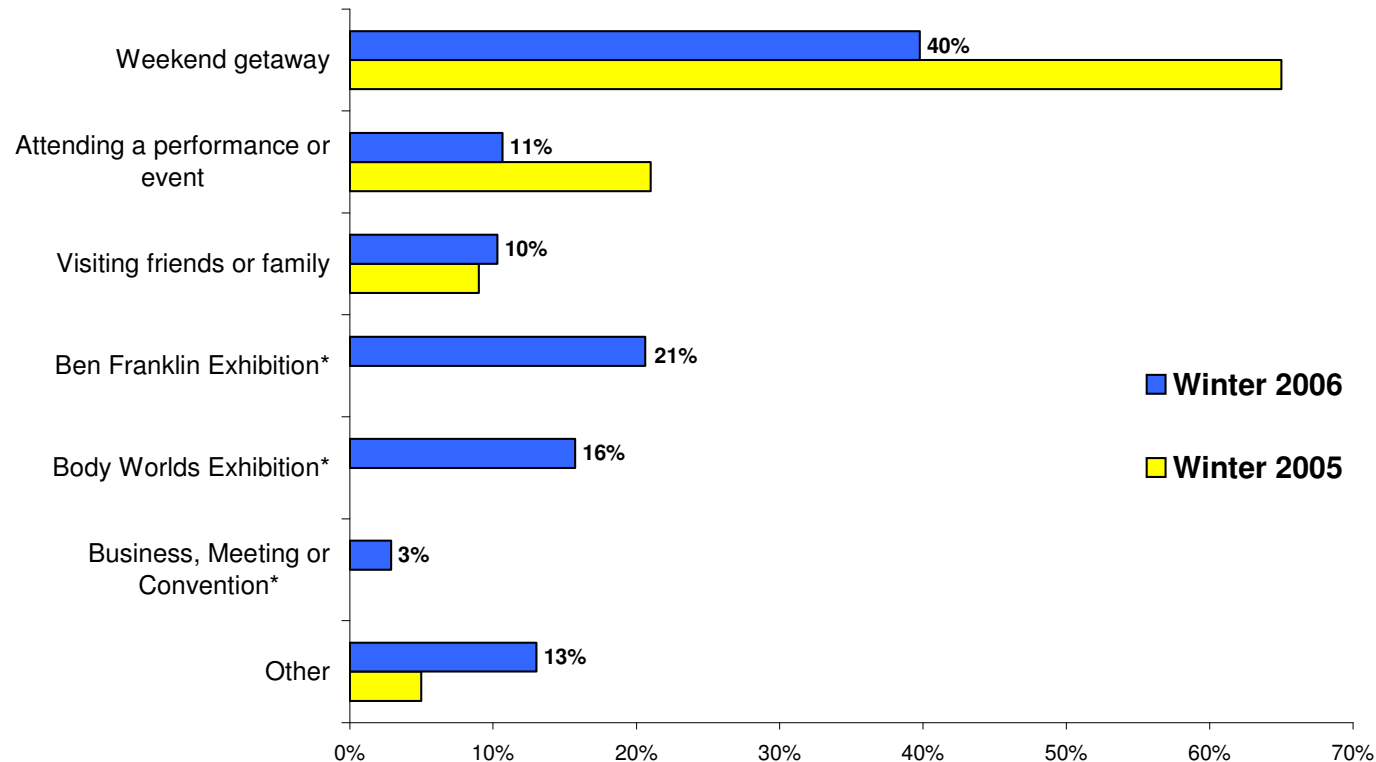
November – April

SURVEY RESPONDENT DEMOGRAPHICS

- 627 Total Respondents
- Average Age: 46 years old
- Average Household Income: \$107,175
- 62% Female, 38% Male
- 88% Caucasian, 6% African-American, 2% Asian-American, 2% Latino, 2% Other
- 95% stayed in a Downtown hotel
- Average party size of 2.38 people

The Ben Franklin and Body Worlds exhibitions drew a significant number of visitors to the area in Winter 2006. However, weekend getaways remain the primary reason to visit.

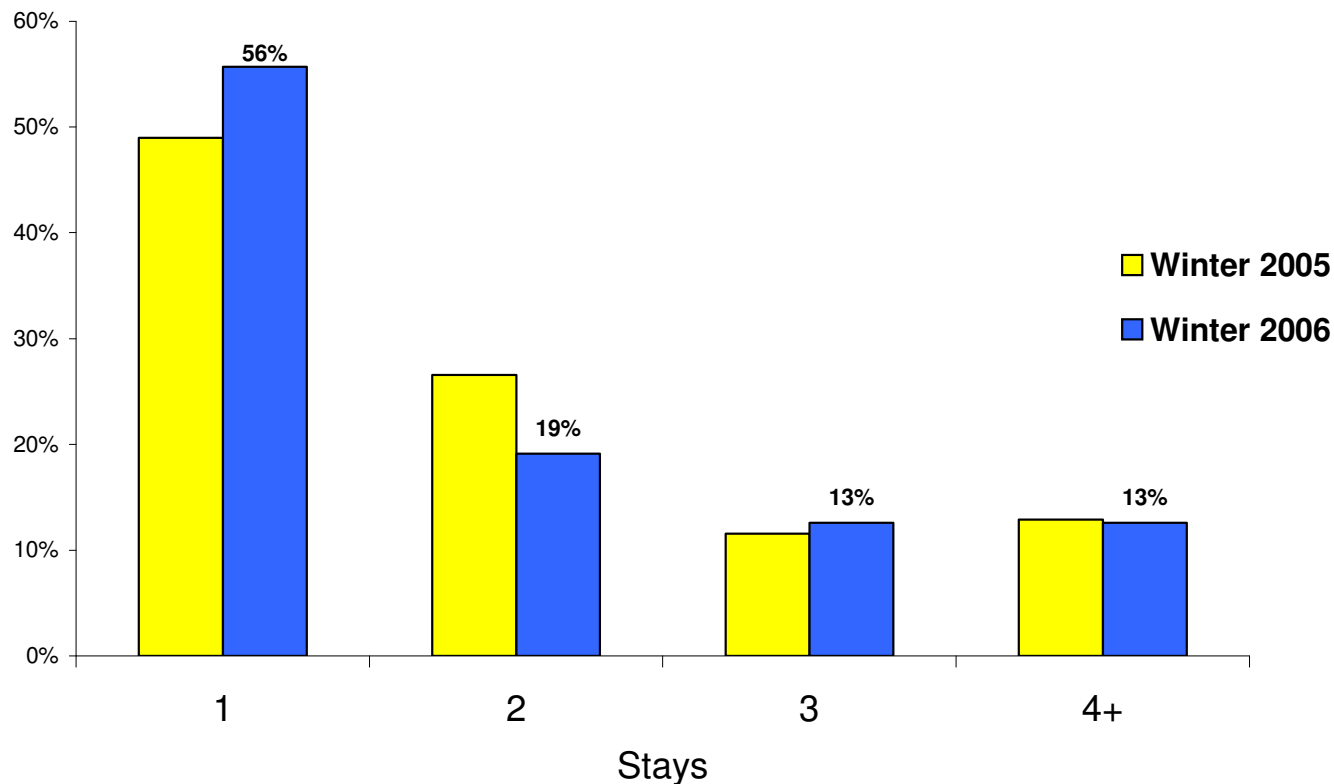
PURPOSE OF VISIT



*Not Asked in 2005

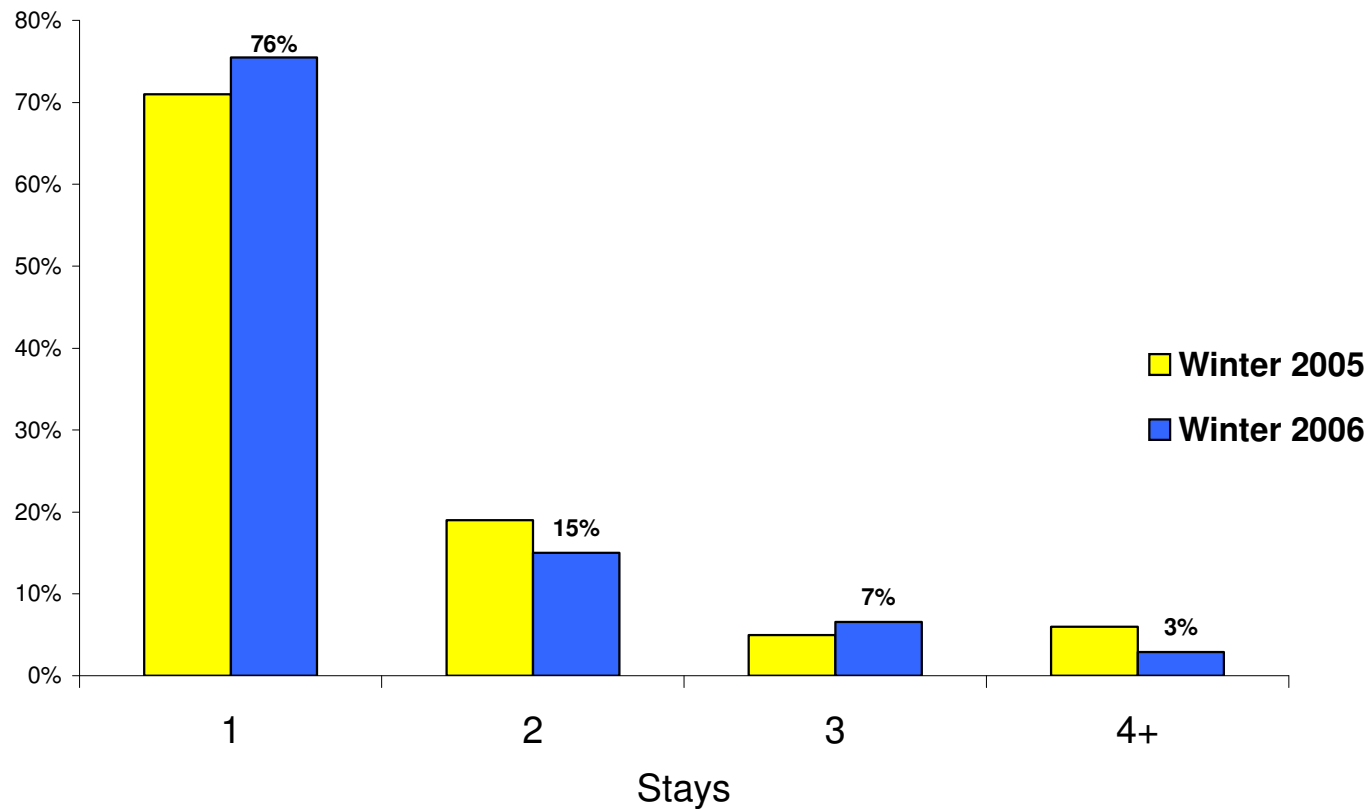
More than half (56%) of overnight visitors in Winter 2006 were making their first visit to Philadelphia in a year, while 26% had stayed three or more times.

OVERNIGHT PHILADELPHIA HOTEL STAYS DURING PREVIOUS YEAR



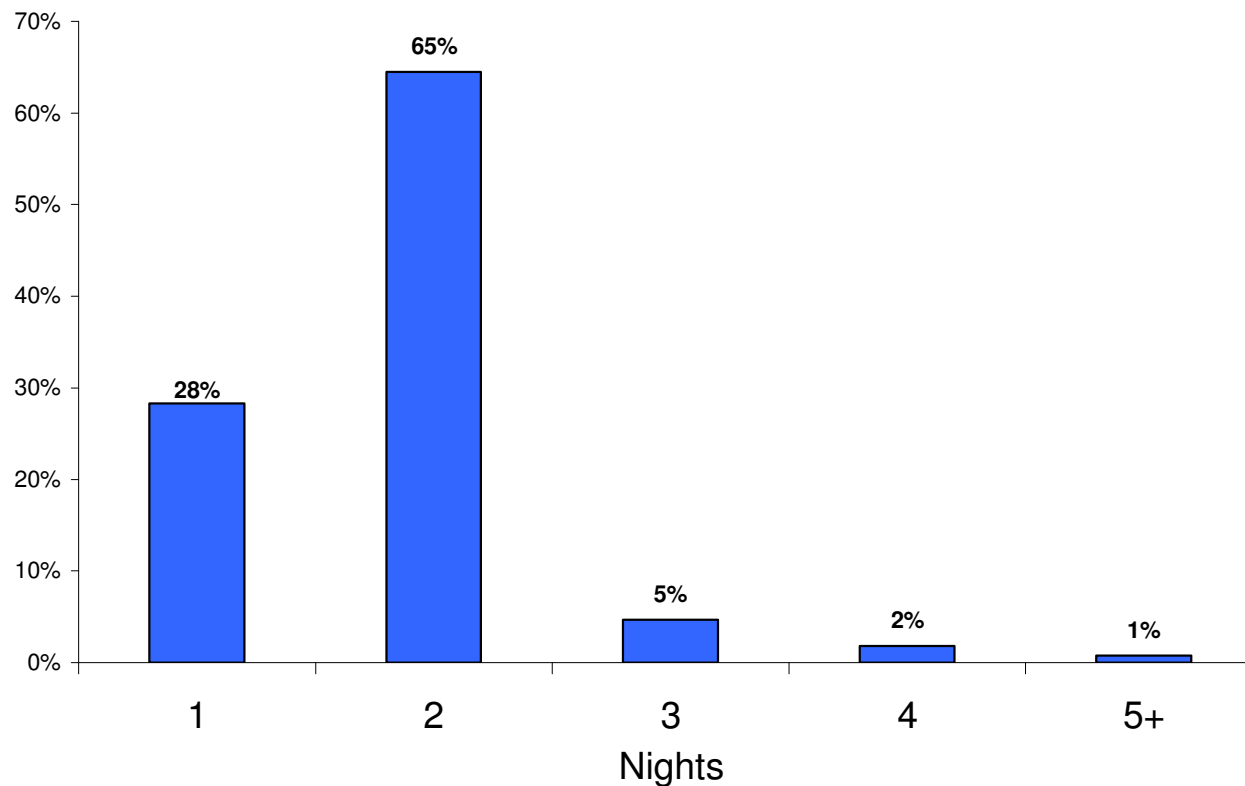
Most visitors (76%) booked only one stay on gophila.com during the previous year. The average visitor booked 1.37 stays.

OVERNIGHT PHILADELPHIA HOTEL STAYS DURING PREVIOUS YEAR USING GOPHILA.COM



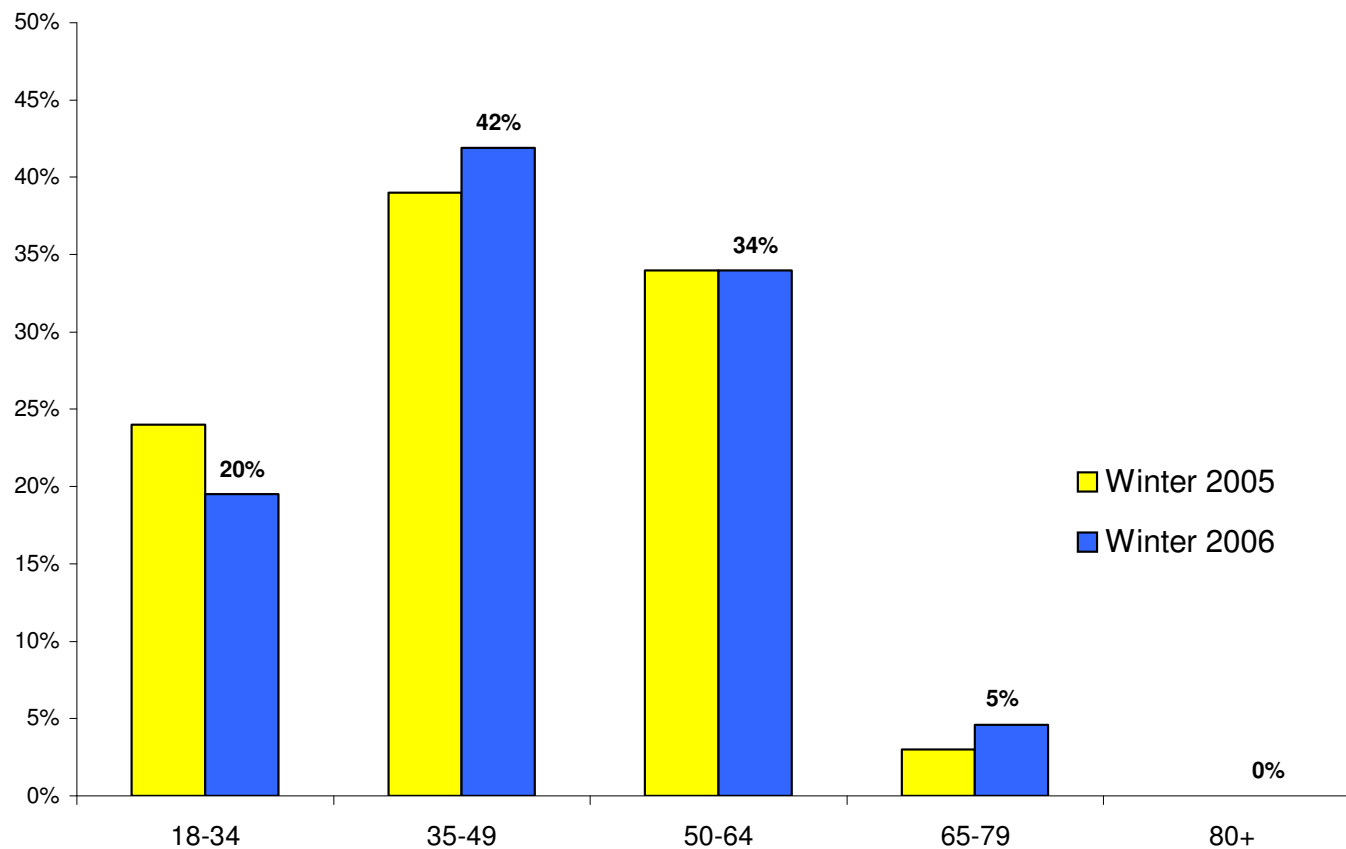
The majority of visitors stayed for 2 nights in Winter 2006, with an average stay of 1.84 nights at a self-reported average daily rate of \$152.78. This compares favorably with the overall 2005 Center City ADR of \$142.90.

LENGTH OF STAY



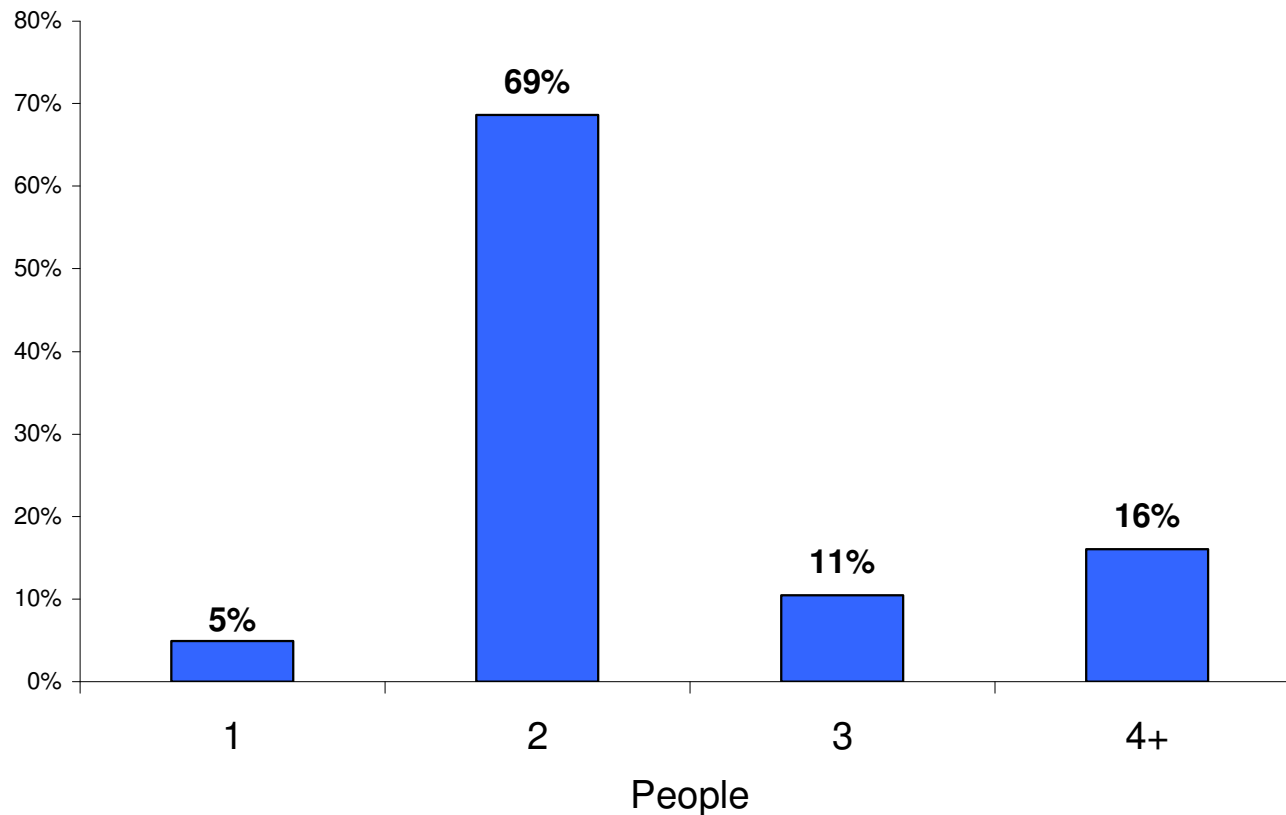
The average age of visitors increased slightly in Winter 2006 to 45.77, up from 44.54 in Winter 2005. This change is attributable to Ben’s Birthday Package consumers, who averaged 47.99 years in age.

VISITOR AGE DISTRIBUTION



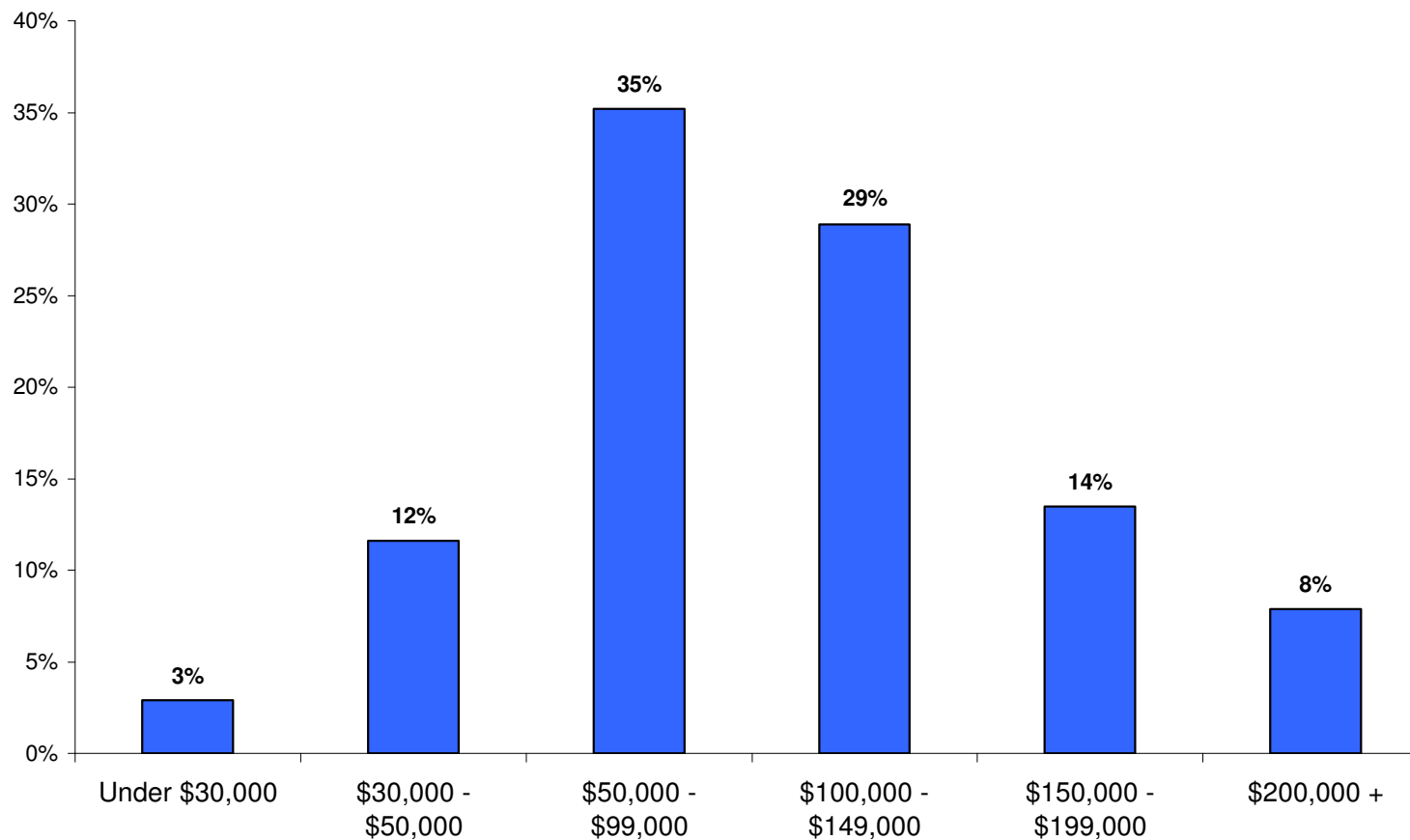
The majority of visitors arrived in parties of two, with an average party size of 2.38.

TRAVEL PARTY SIZE



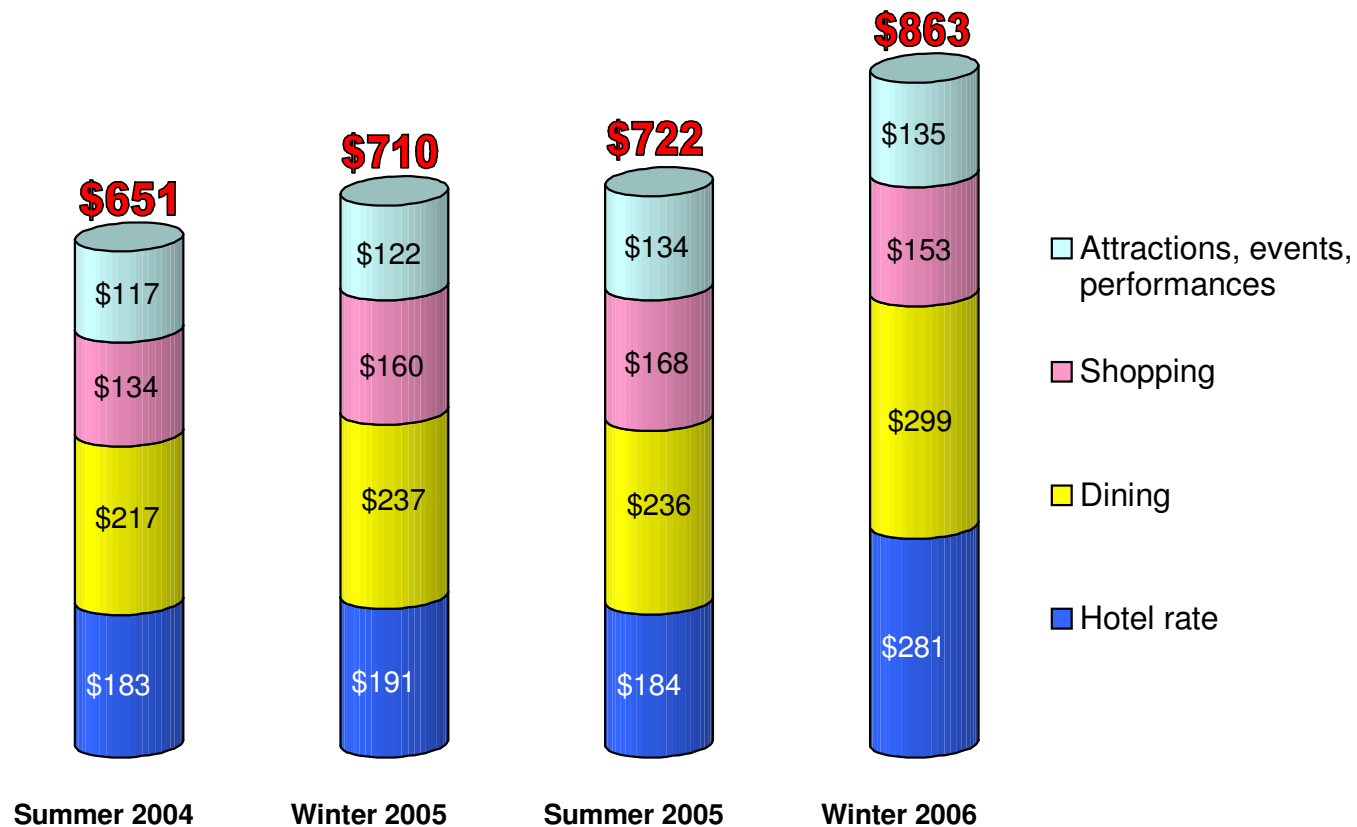
The average household income for visitors was \$107,175, a 13.6% increase from Winter 2005, with just over 50% of households earning \$100,000 or more.

2005 HOUSEHOLD INCOME



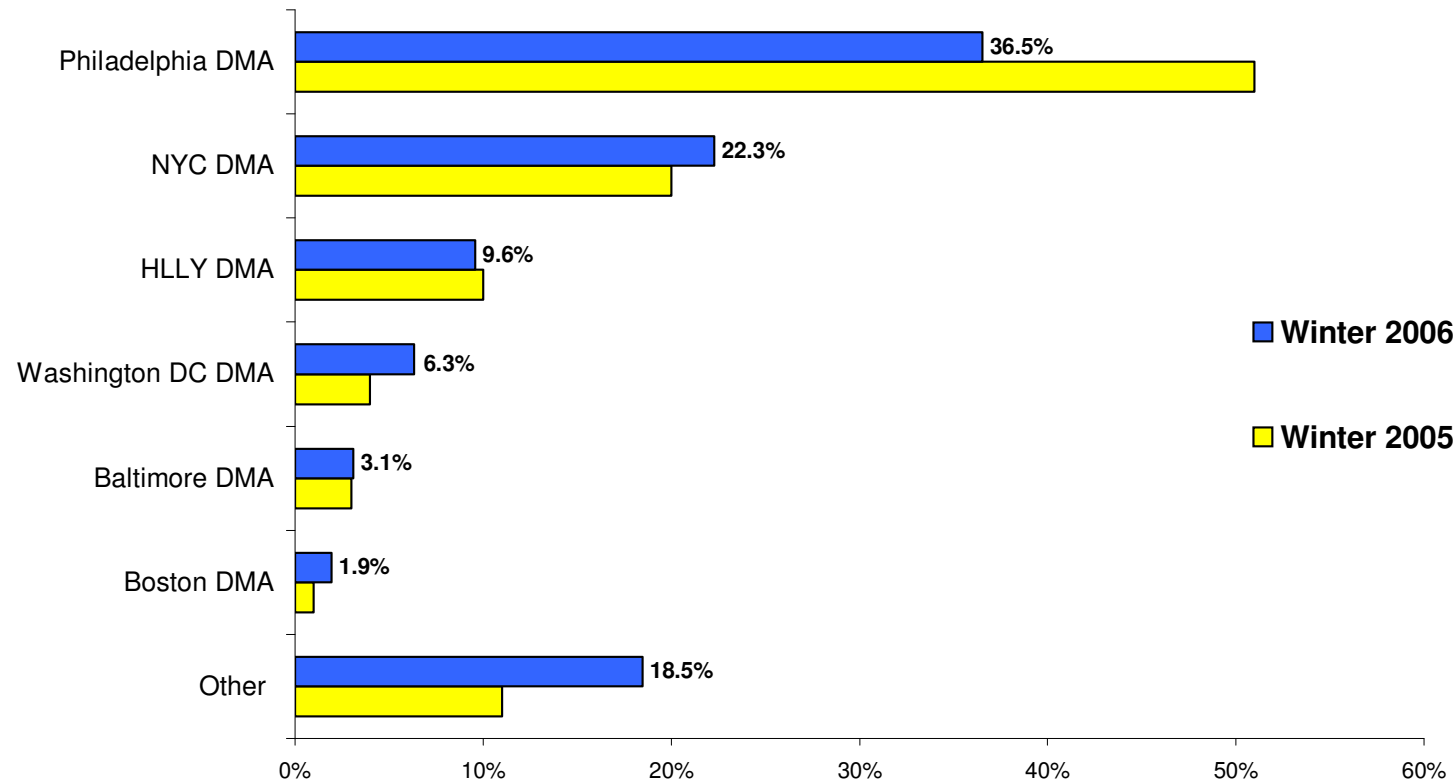
Consumer trip spending continued its upward trend, increasing 22% from Winter 2005 to \$863 due to a significant increase in established levels of dining and hotel spending.

AVERAGE VISITOR SPENDING



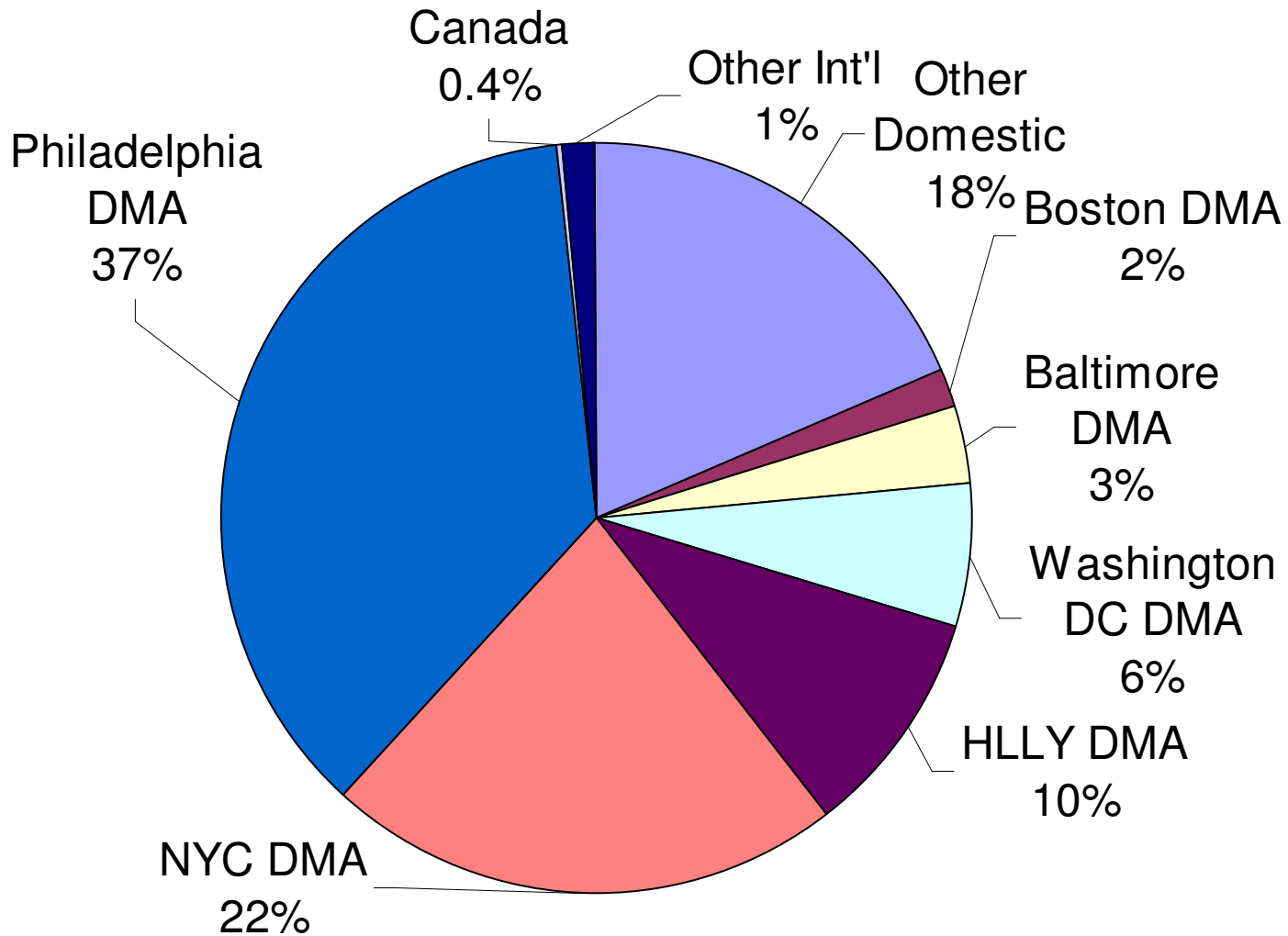
A majority (63%) of visitors came from outside the Philadelphia area in Winter 2006, with gains in the New York, Washington D.C. and Boston DMAs over Winter 2005.

ONLINE HOTEL CONSUMERS* BY DMA



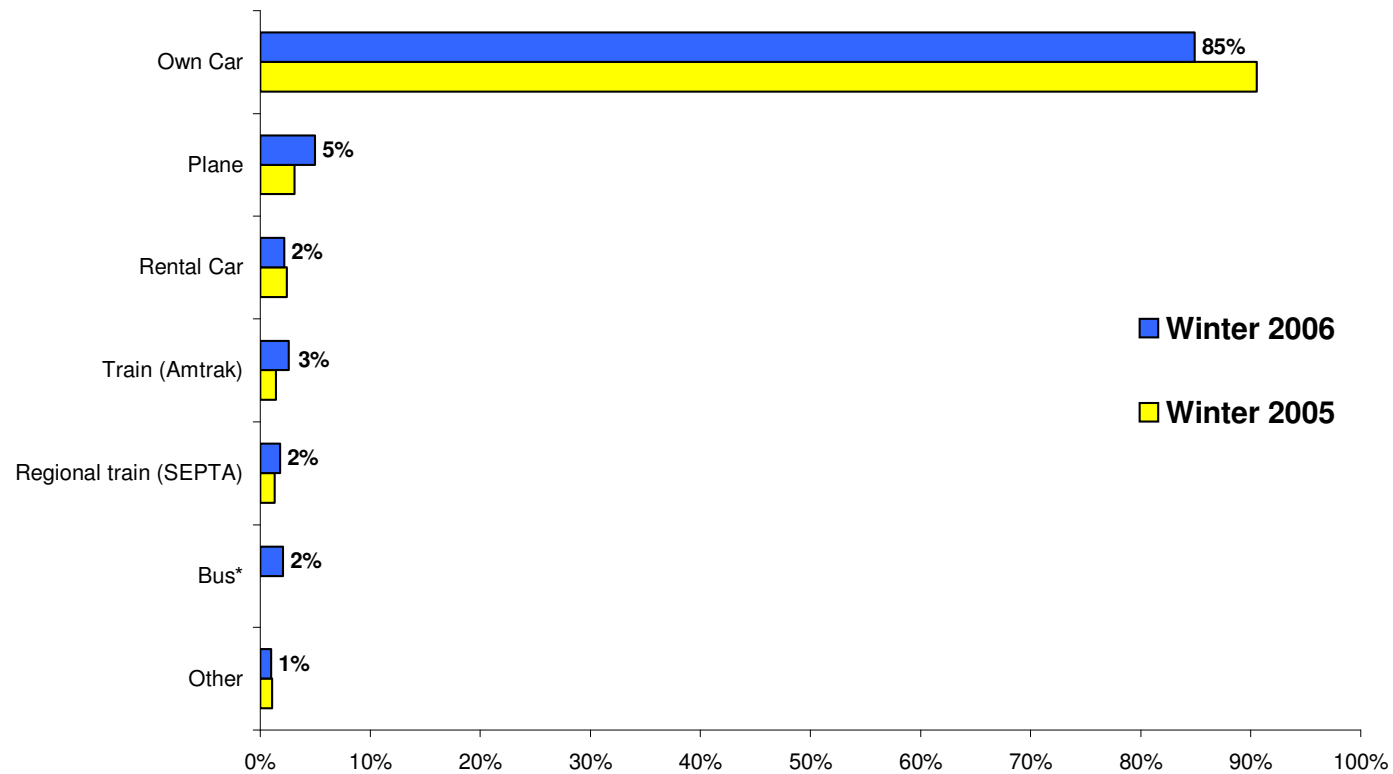
* All Geographic data includes every room and package booked online

ONLINE HOTEL CONSUMERS BY DMA



Philadelphia remains overwhelmingly a drive destination, with 86% of visitors arriving via their own car in Winter 2006. Plane and train arrivals did increase moderately from Winter 2005.

MODE OF ARRIVAL

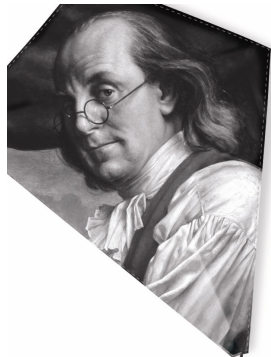


*Not Asked in 2005

PHILLY'S MORE
FUN WHEN YOU
**SLEEP
OVER**[®]
gophila.com



HOTEL PACKAGES



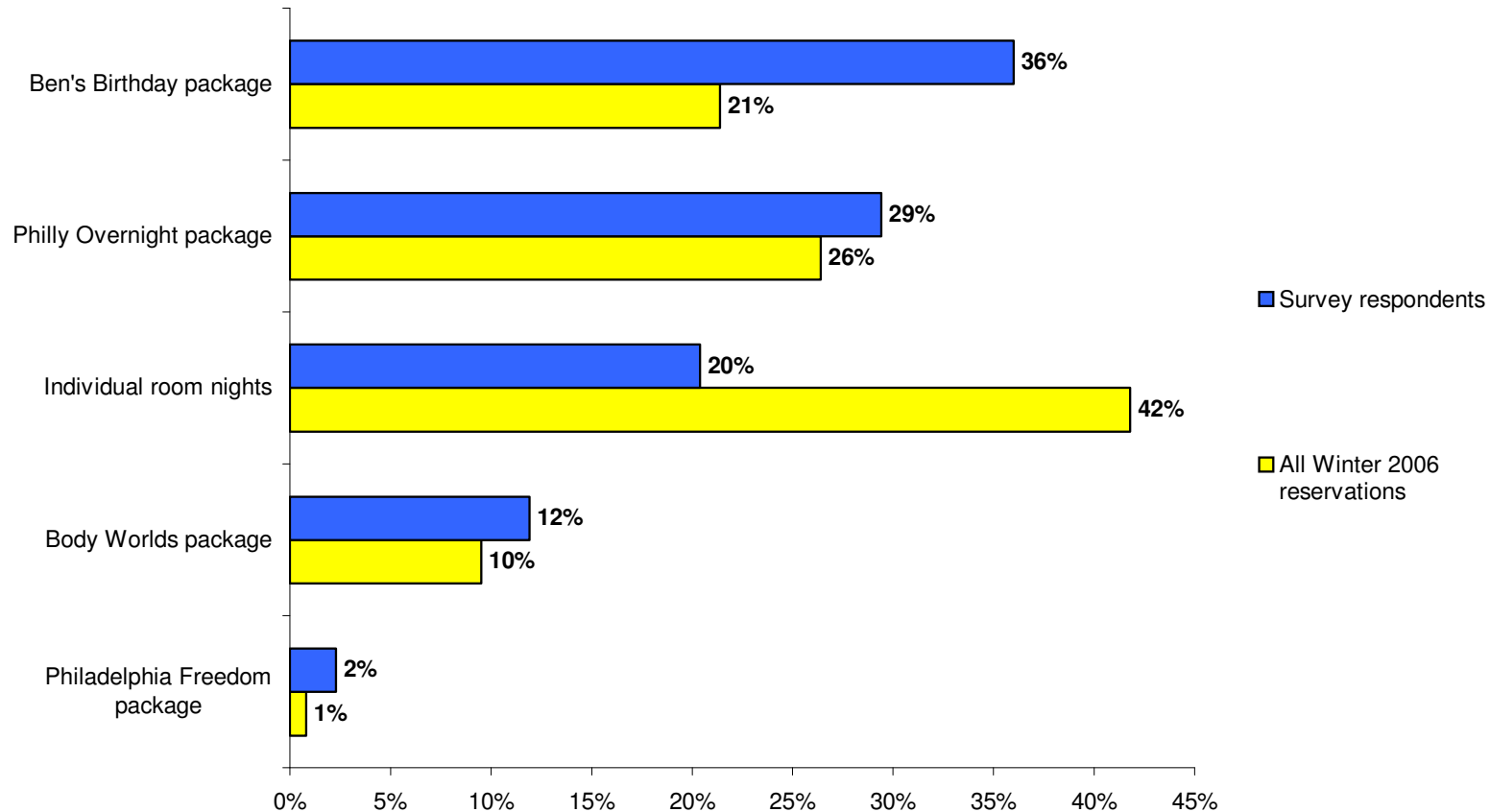
Gunther von Hagens'

BODY WORLDS

The Anatomical Exhibition of Real Human Bodies

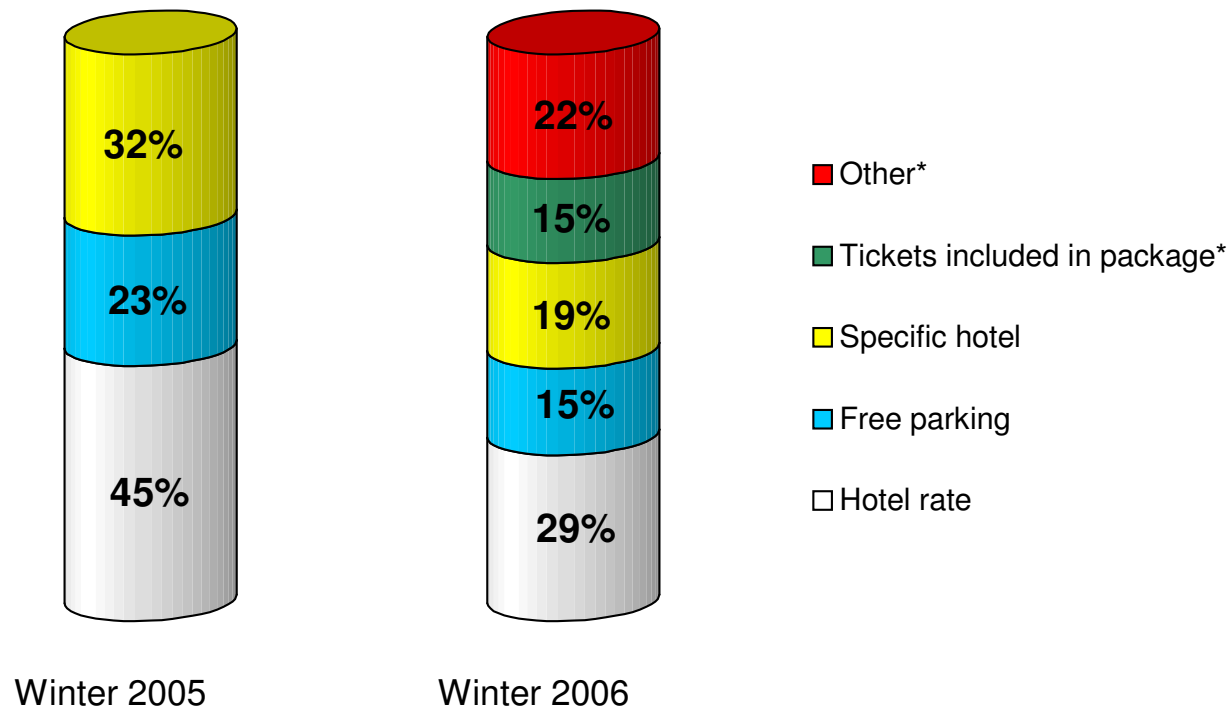
Survey respondents were most likely to have purchased the Ben's Birthday package, which was supported by advertising and was available from mid-December through April. However, individual room nights made up the largest segment of gophila.com reservations.

TYPE OF PACKAGE



Online consumers cited a variety of features as “most attractive” in the package, with hotel rate continuing to lead the way at 29%. The breadth of responses suggests that the variety offered by the package is a major selling point.

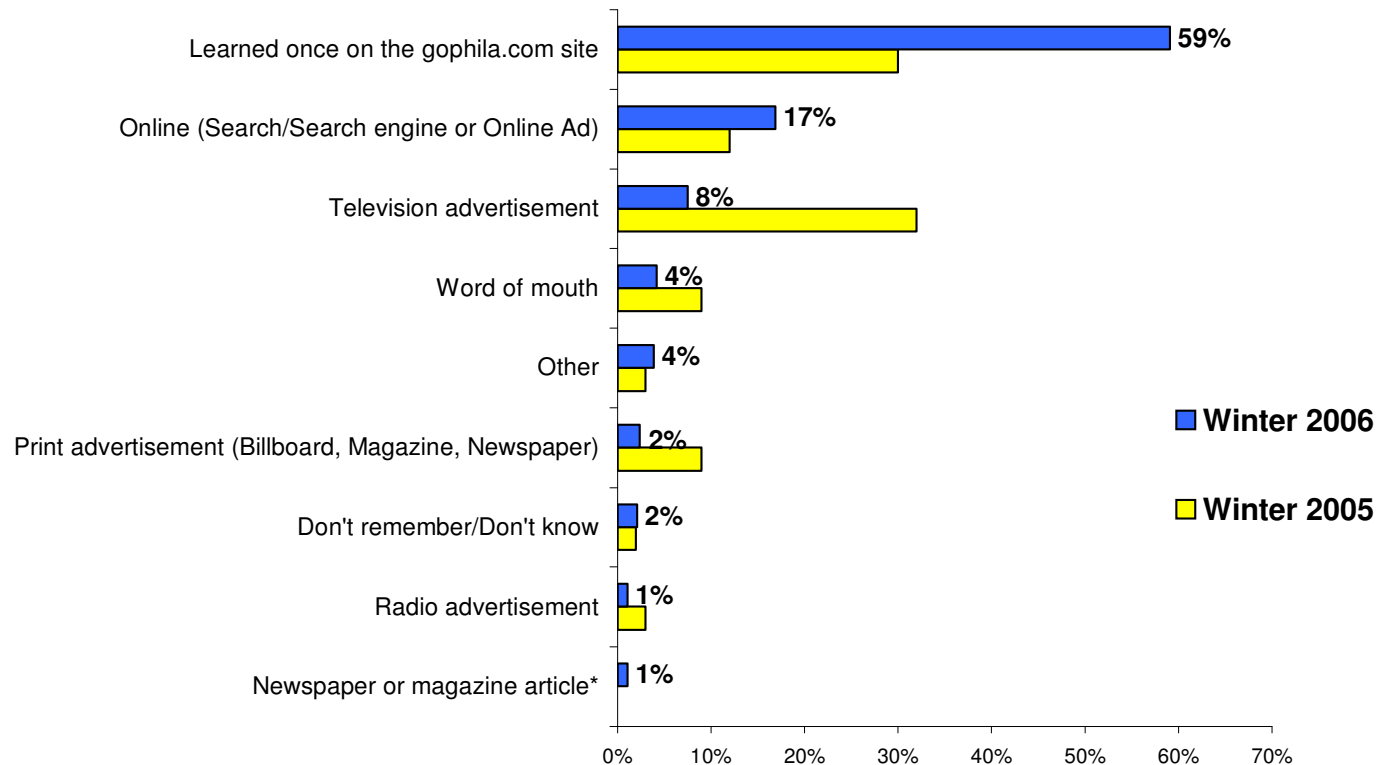
MOST ATTRACTIVE PACKAGE FEATURE



*Not Asked in 2005

Gophila.com became the predominant source through which online consumers learned about hotel packages in Winter 2006. Just 8% learned through a television advertisement, reflecting GPTMC's shift away from television advertising for Winter 2006.

LEARNED ABOUT THE PACKAGE



*Not Asked in 2005

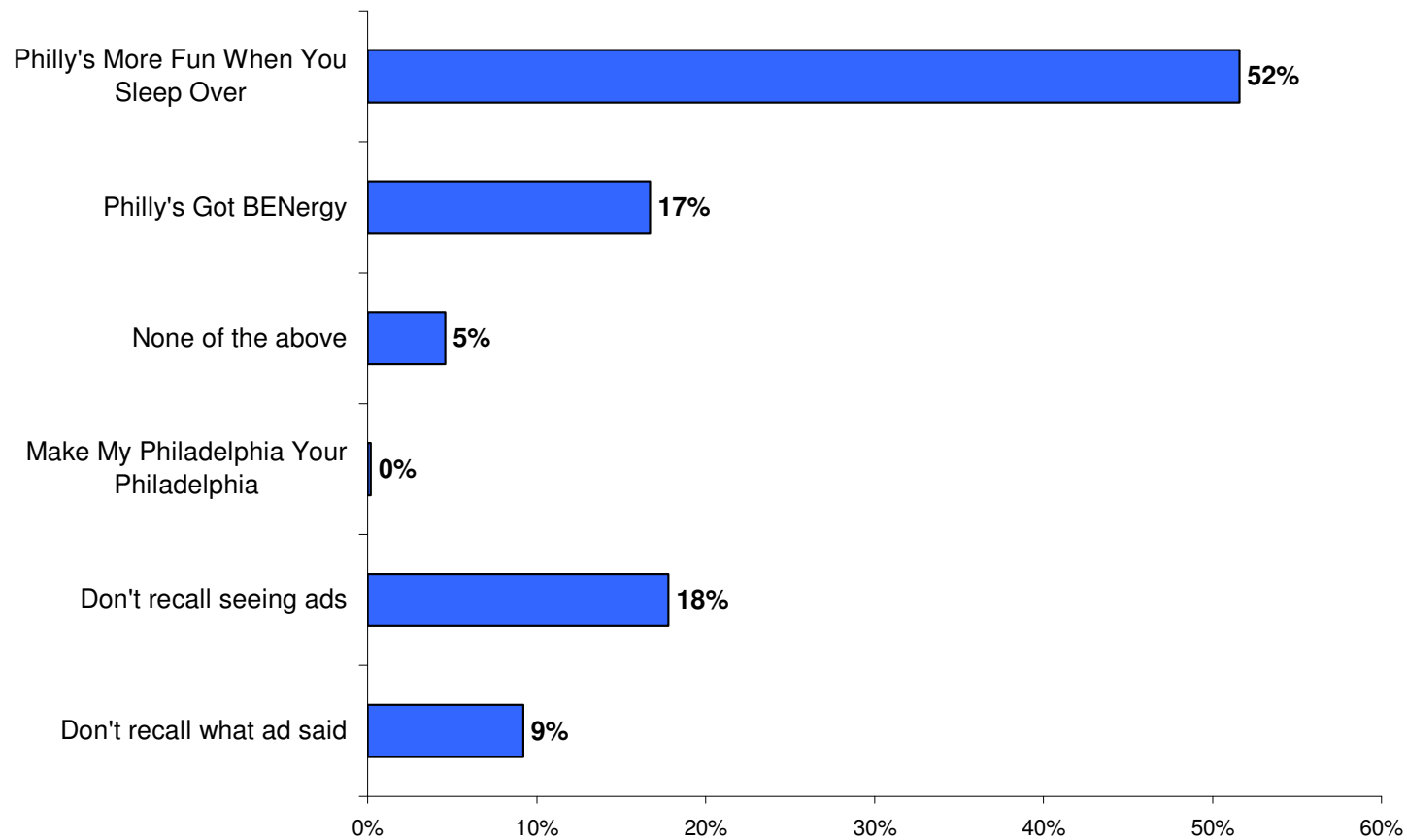


DECIDING TO VISIT



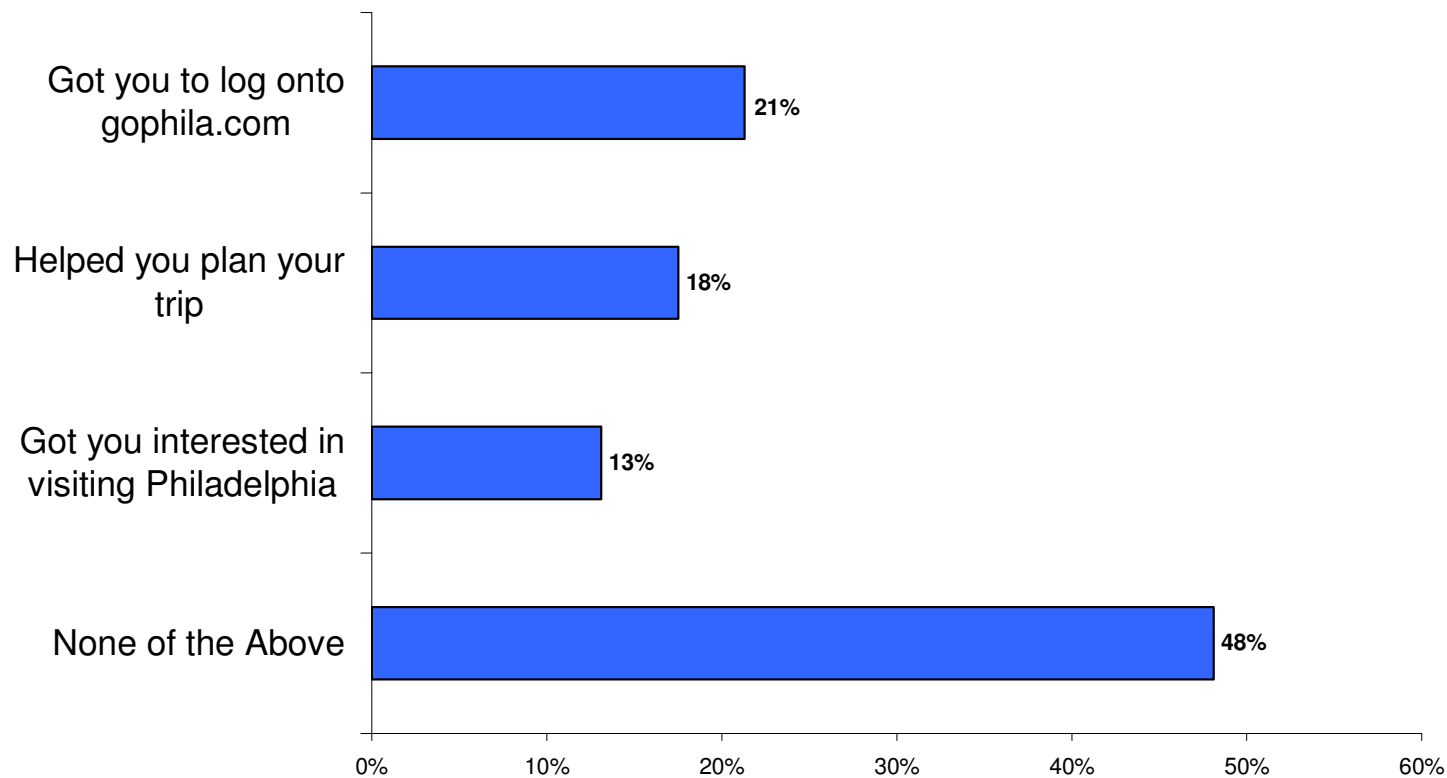
“Philly’s More Fun” was the dominant message in Winter 2006, recognized by 52% of online consumers. 73% of consumers could identify an advertising message.

ADVERTISING MESSAGE RECOGNITION



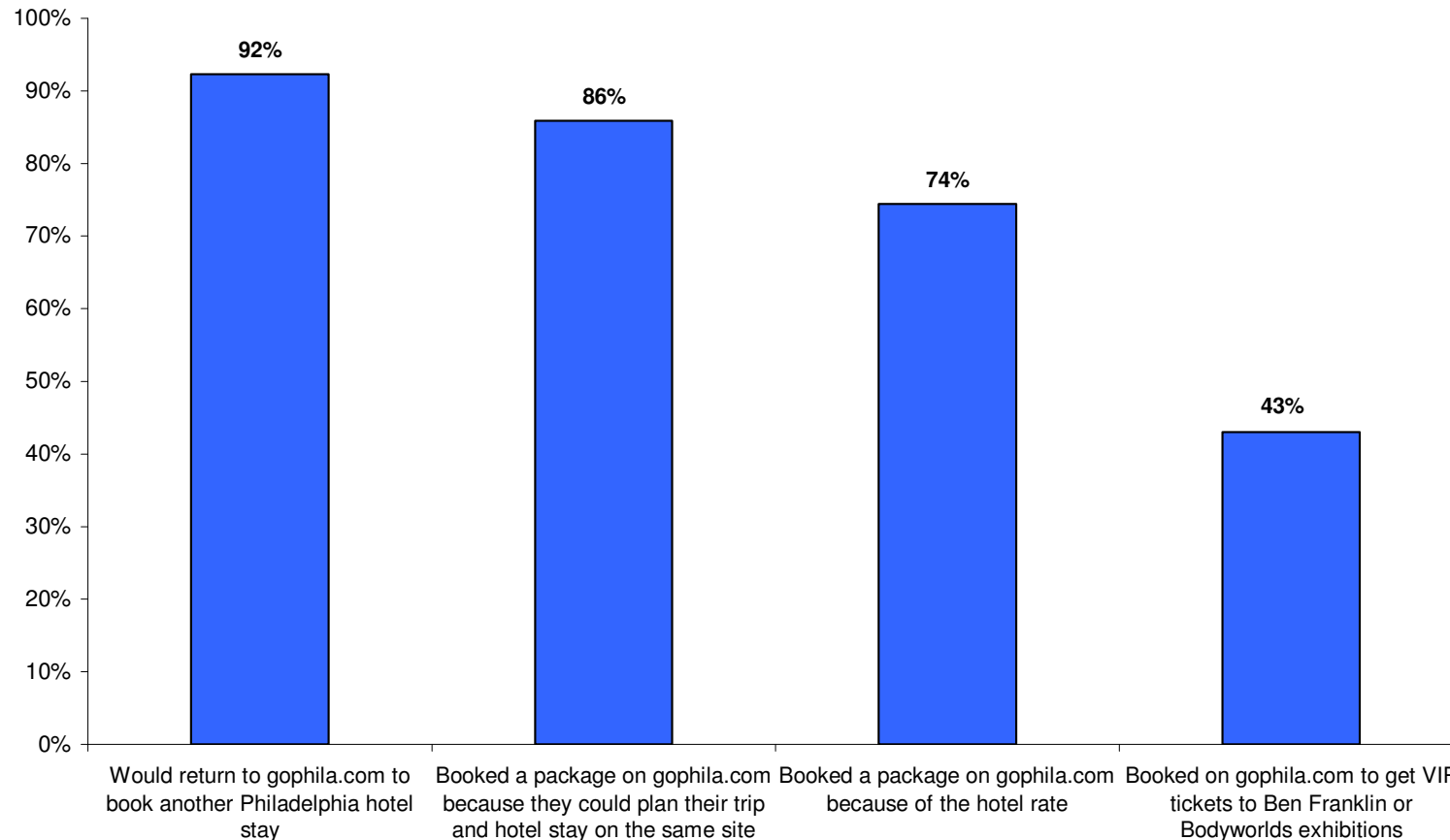
Over half (52%) of online consumers said that reading about Philadelphia influenced their trip, with 21% using a magazine, newspaper or internet article as impetus to log onto gophila.com. Respondents could only choose one option.

READING A MAGAZINE, NEWSPAPER OR INTERNET ARTICLE ABOUT PHILADELPHIA . . .



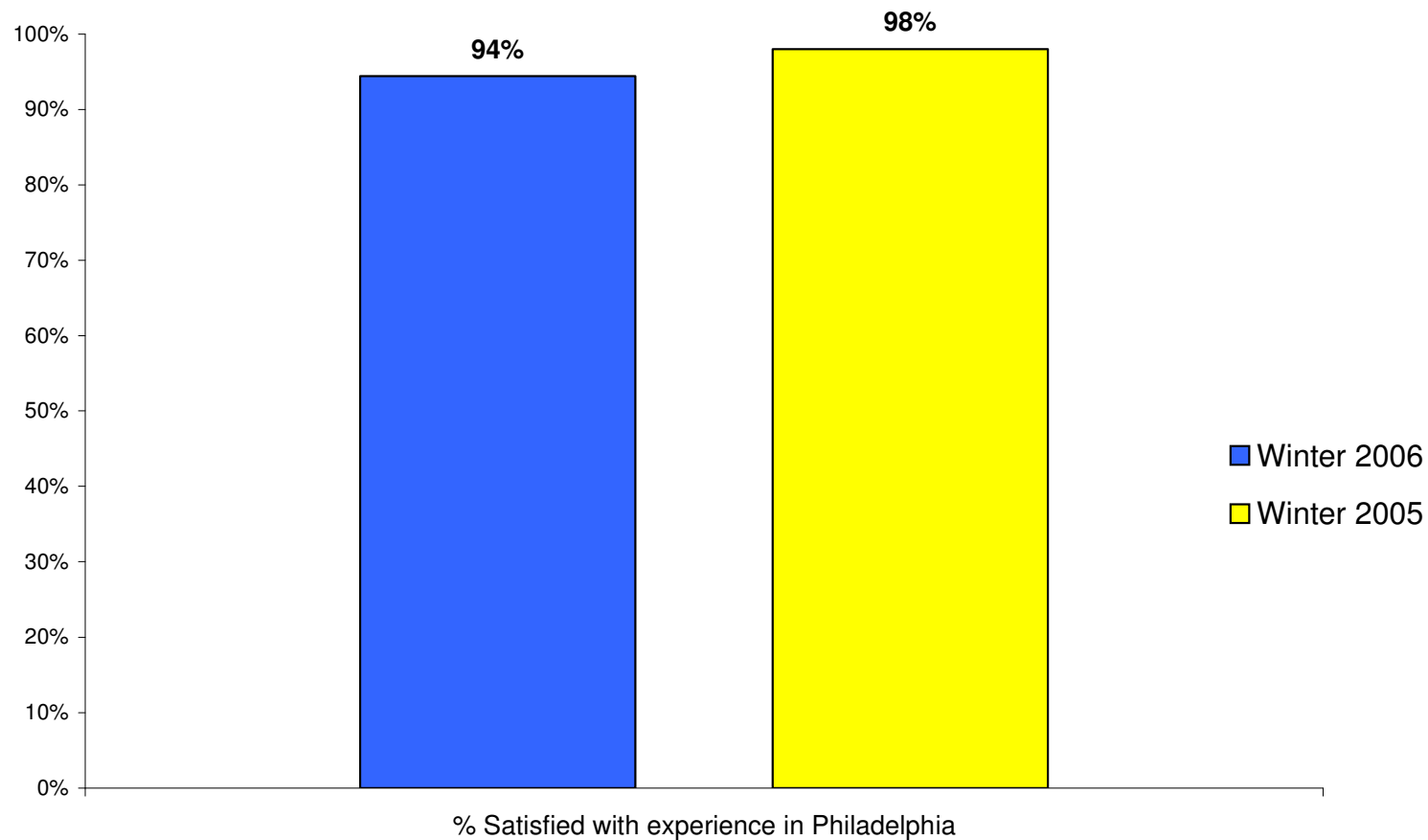
Gophila.com scored very highly with Winter 2006 consumers, who especially liked gophila's rates and the ability to book a hotel package and plan a trip on the same site. An overwhelming 92% of online consumers said they would book again on gophila.com.

% WHO AGREE THAT THEY . . .



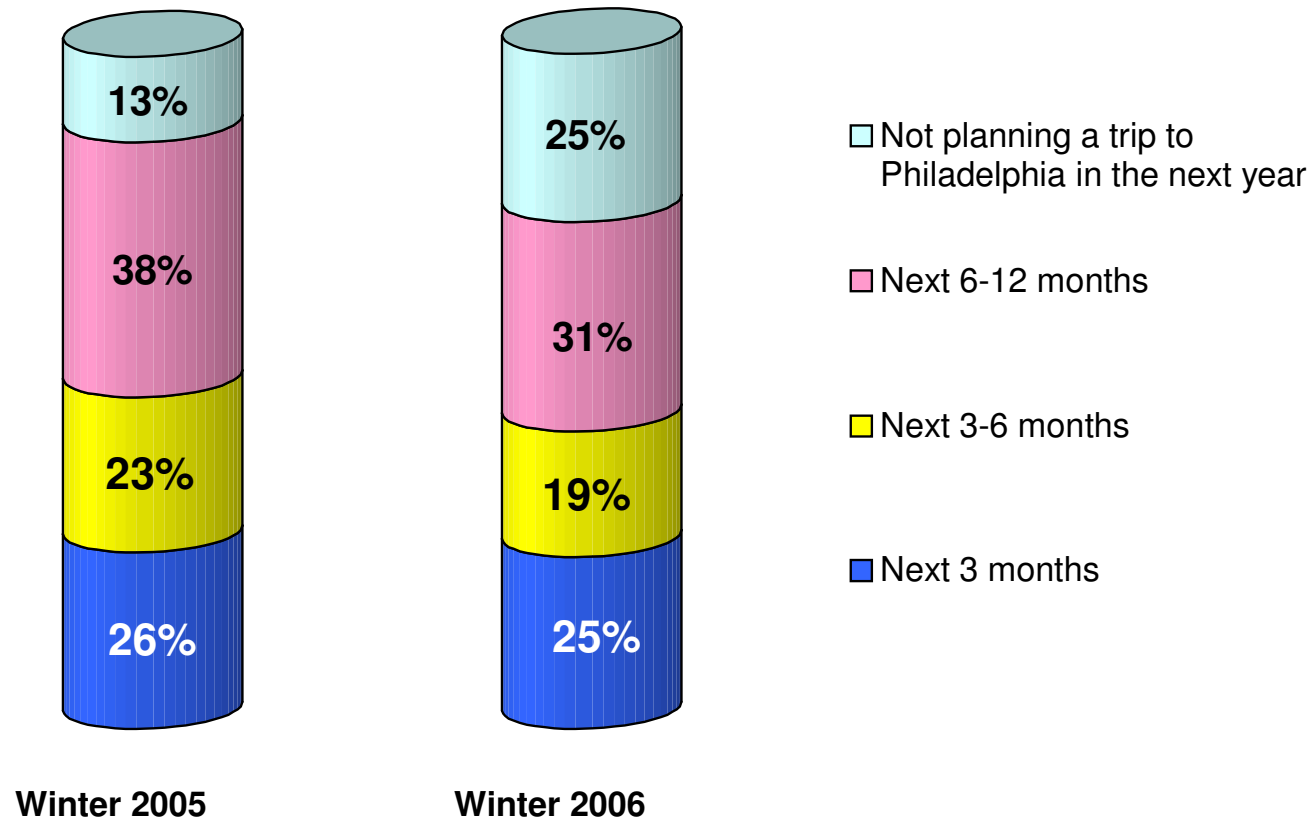
Visitor satisfaction remained extremely high for Winter 2006, with 94% of visitors reporting that they were either “very satisfied” or “somewhat satisfied” with their experience in Philadelphia.

OVERALL SATISFACTION



75% of visitors reported that they plan to return to Philadelphia within a year. The decrease from Winter 2005 was largely attributable to Ben's Birthday Package consumers, 35% of whom did not plan to return within a year.

RETURN VISIT PLANS



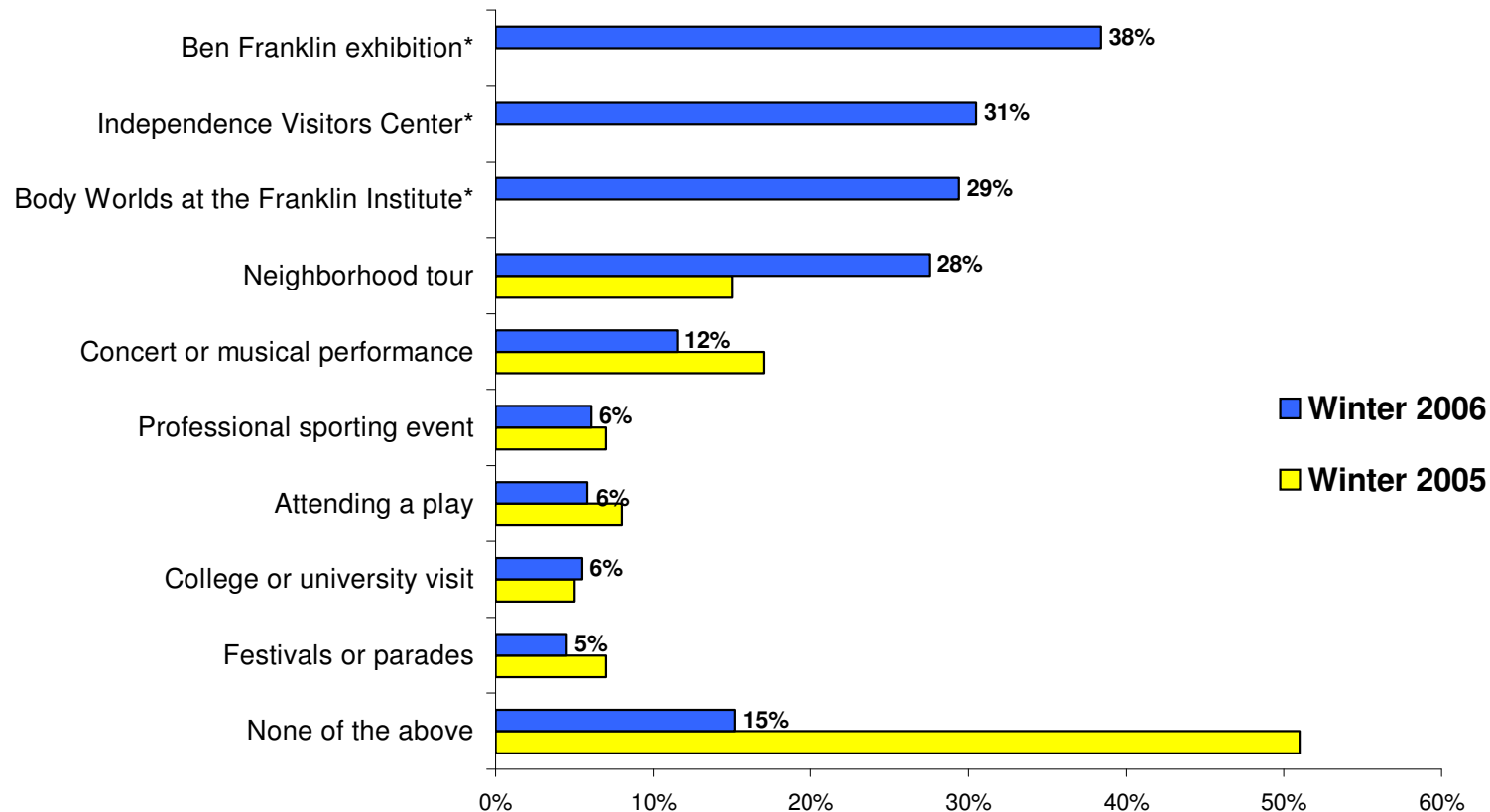


ACTIVITIES AND ATTRACTIONS



Winter 2006 visitors were far more active than Winter 2005, with visitors flocking to the Ben Franklin exhibition, the Body Worlds exhibition and the neighborhood tours.

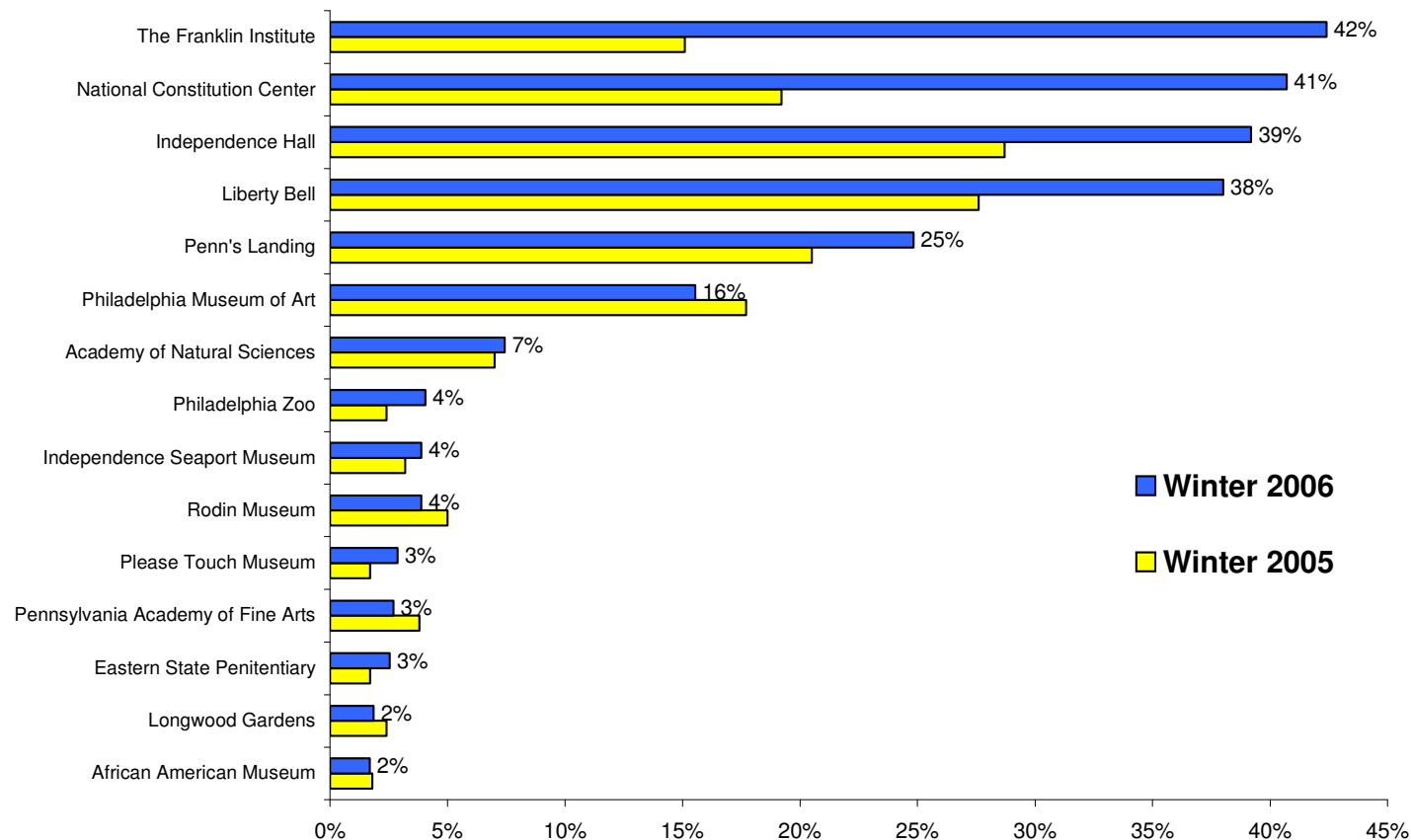
ACTIVITY PARTICIPATION



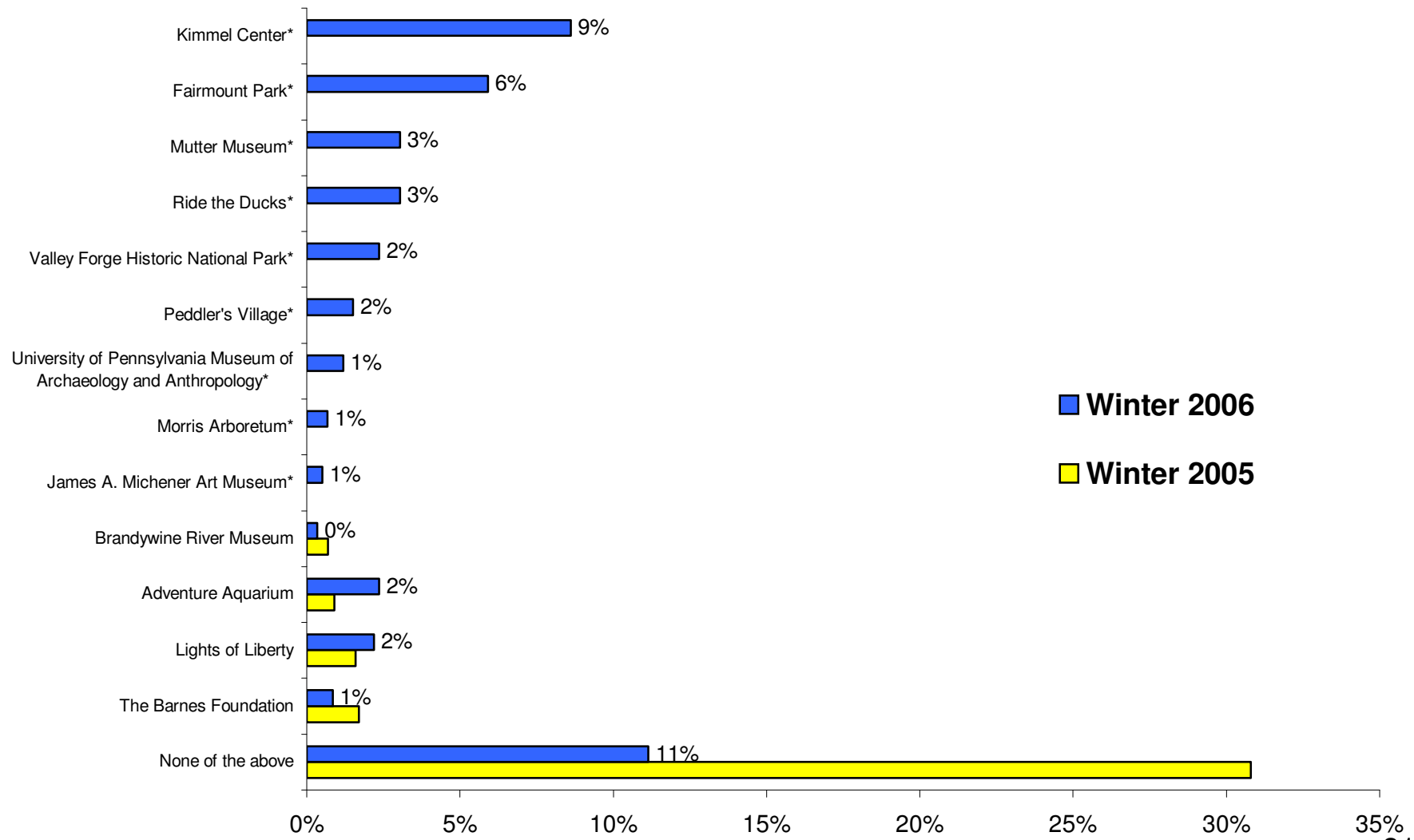
*Not Asked in 2005

The Body Worlds and Ben Franklin exhibitions led to a significant increase in visitation at the Franklin Institute and historic attractions from Winter 2005. The percentage of visitors who saw at least one attraction increased substantially to 89%.

ATTRACTIONS VISITED



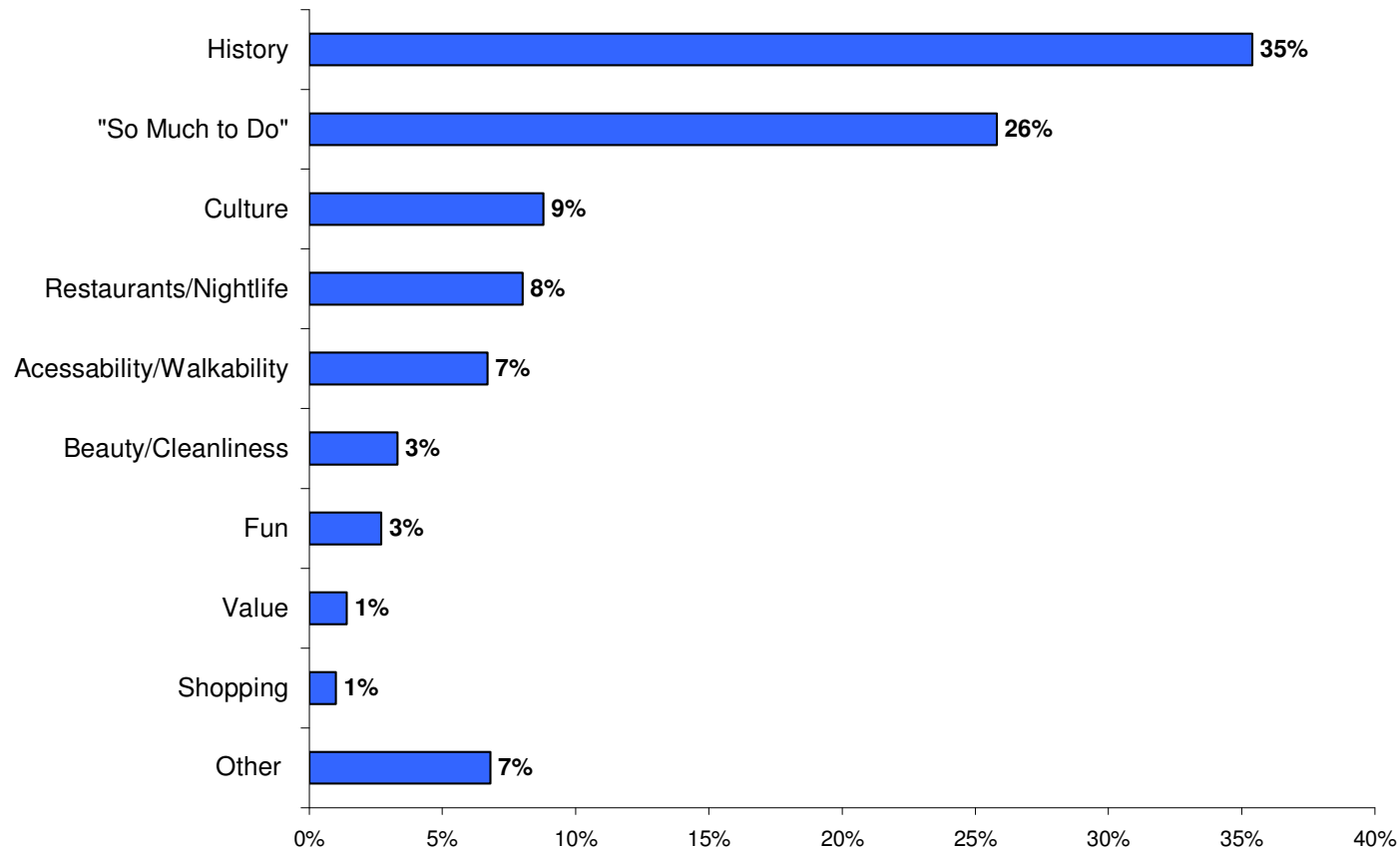
ATTRACTIONS VISITED (II)



*Not Asked in 2005

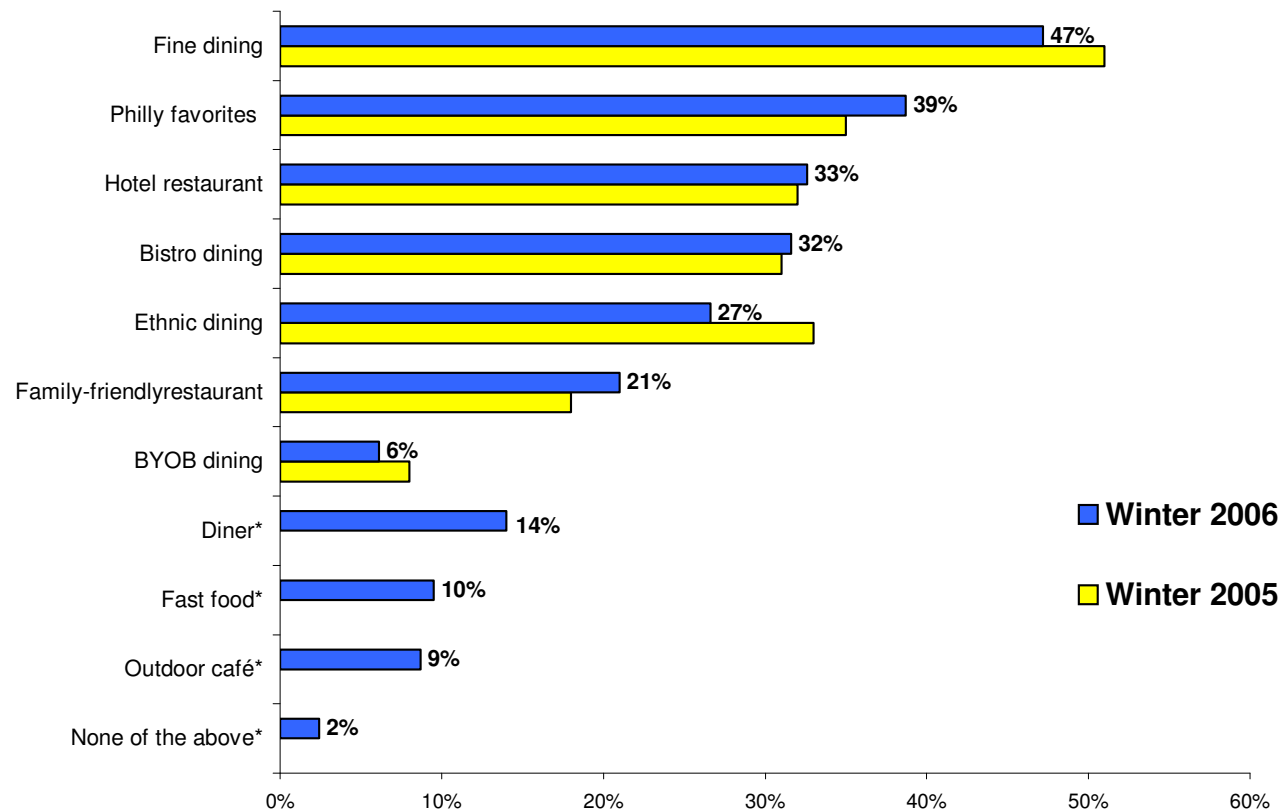
Historical attractions and Philadelphia’s message of “so much to do” top the reasons to visit Philadelphia offered by our visitors. Among visitors who did not purchase a Ben’s birthday package, more (27%) cited “so much to do” than history (26%).

IF YOU COULD OFFER PEOPLE ONE REASON TO VISIT PHILADELPHIA AND THE COUNTRYSIDE™, WHAT WOULD IT BE?



Fine dining and Philly favorites continued to stand out in a strong dining market among visitors, as overall dining expenses increased 26% to \$299 per travel party from Winter 2005.

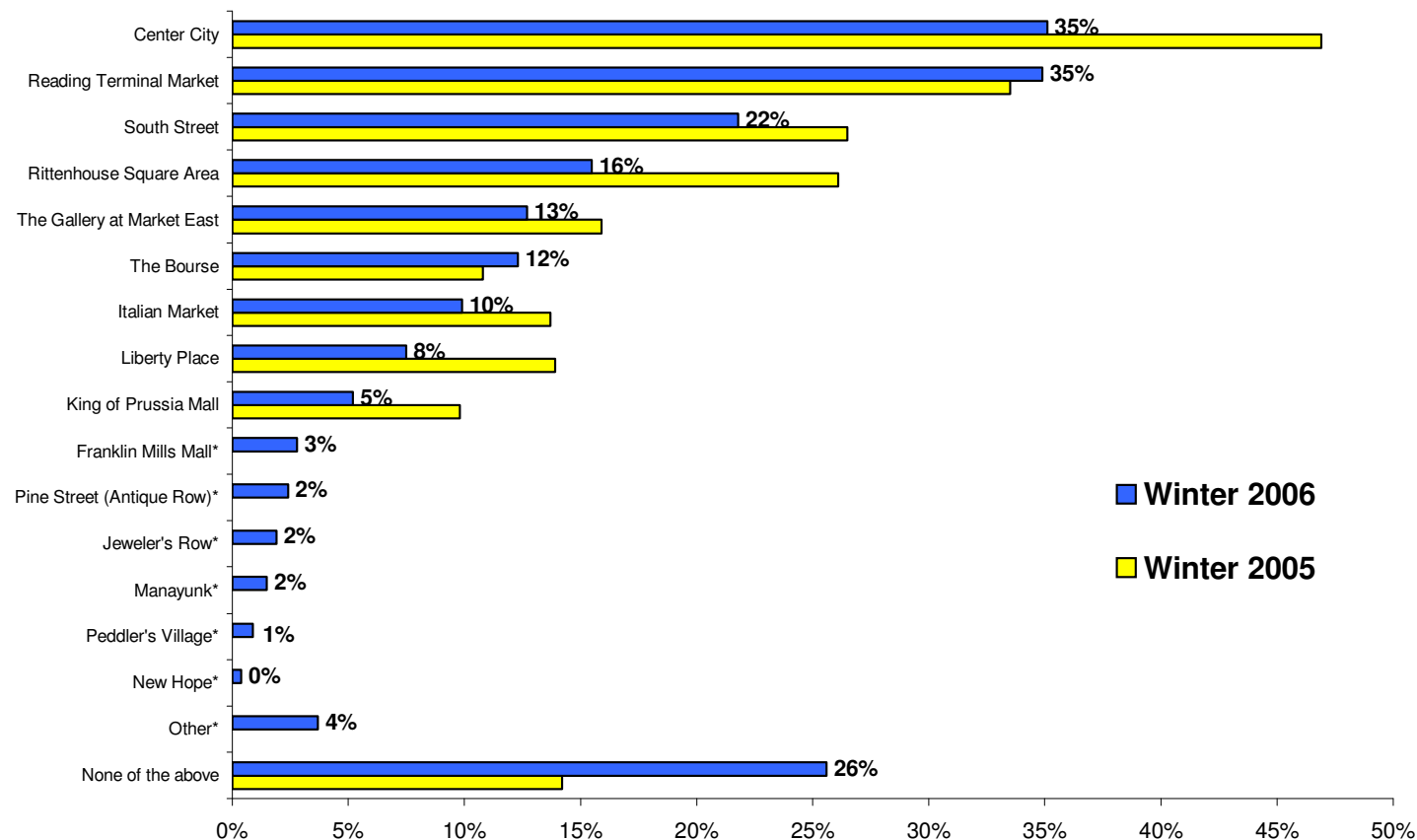
DINING EXPERIENCES



*Not Asked in 2005

Center City and the Reading Terminal Market continued to be the favorite locations for shoppers in Winter 2006, with overall shopping declining 4% to \$153 as significantly more consumers visited attractions.

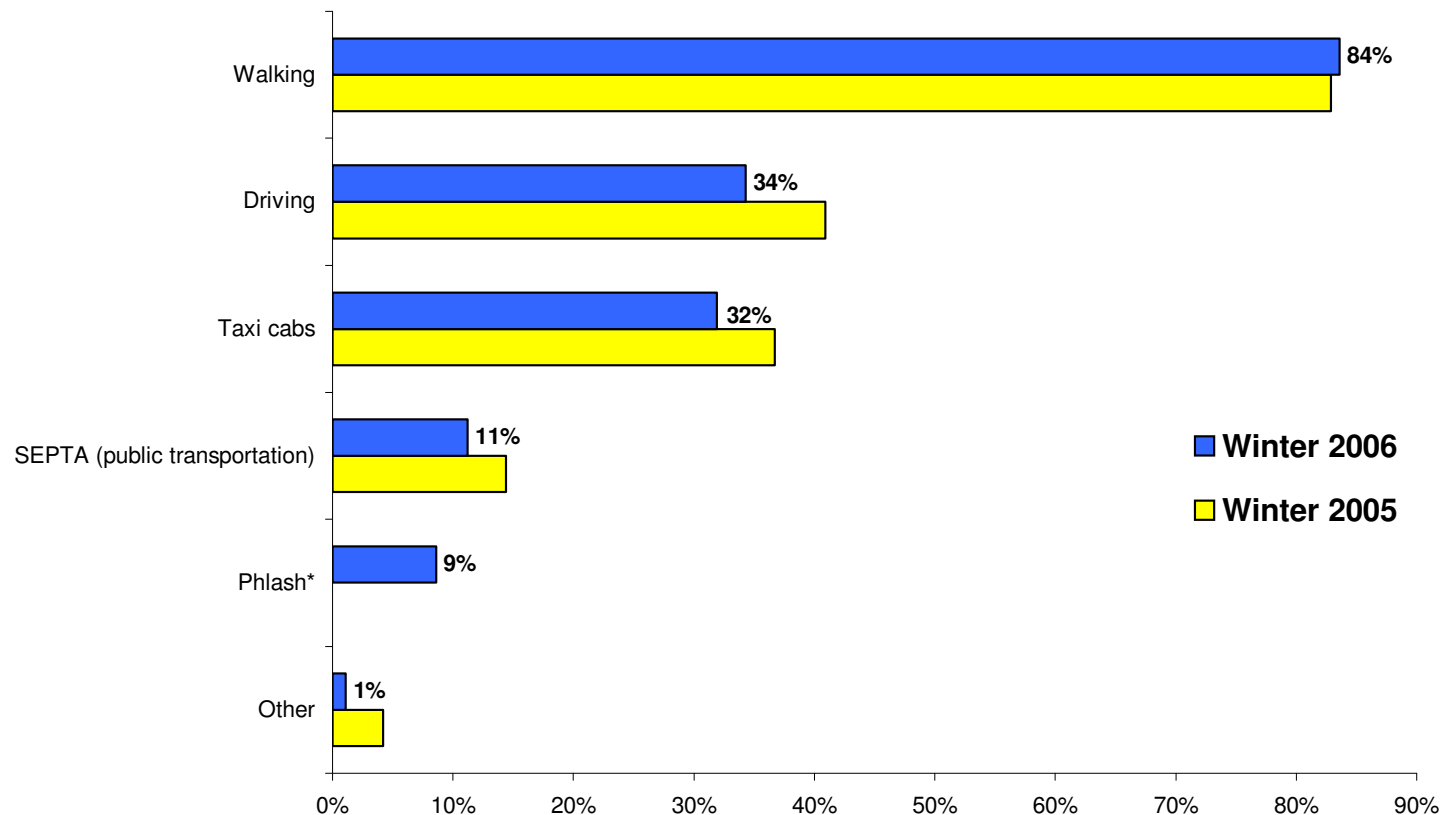
SHOPPING AREAS VISITED



*Not Asked in 2005

Visitors continued to view Philadelphia as a walking city in overwhelming numbers in Winter 2006. The Phlash also returned and served nearly as many visitors as SEPTA.

GETTING AROUND WHILE HERE



*Not Asked in 2005