2008-2009 Greater Philadelphia Tourism Monitor

Philadelphia and The Countryside®

Greater Philadelphia Tourism Marketing Corporation
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FOREVER INDEPENDENT PHILADELPHIA AND THE COUNTRYSIDE

Greater Philadelphia Tourism Marketing Corp. GPTMC

SEAL OF THE CITY OF PHILADELPHIA

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EXECUTIVE SUMMARY

"I know half my advertising works. I just don't know which half."
– John Wanamaker, Philadelphia, PA

Fortunately, John Wanamaker didn't have the last word on marketing effectiveness. Research at GPTMC helps to ensure that all of our advertising and marketing works, including:

- Destination stories in magazines and newspapers
- Our virtual visitor center, **gophila.com**, and its companion insider's guide, **uwishunu.com**
- Promotions that garner media and consumer attention
- Partnerships with local media and national brands that extend the reach of what we can do on our own

Visitors develop an interest in a trip to Greater Philadelphia through word of mouth, from ads they see, travel stories they read and explorations on the Web. The research program at GPTMC monitors, tracks and measures all of these avenues to ensure that we are:

- Getting Philadelphia on the radar of those who are not aware of it as a vacation destination
- Offering those who are interested in Philadelphia great reasons to visit now and easy booking opportunities
- Staying in touch with loyal visitors and providing them with more reasons to visit and tantalizing deals and offers

This year's *Tourism Monitor* looks a little different than the reports we have produced annually since 2004. In our marketing campaigns, GPTMC tells people that Greater Philadelphia is fun, historic, accessible, authentic and discoverable. And now we are heeding our own message and making the *Tourism Monitor* easier to read and use.

The report is divided into seven sections. The entire report and each individual section are available for download at **gophila.com/research**, where you will also find individual studies GPTMC publishes on a variety of tourism-related topics. Here's a look at how each section breaks down:

1. **Key Visitor Statistics for Greater Philadelphia's Tourism Industry:** The key indicators of a tourism industry include overnight stays, jobs and economic impact. On these and many other measures presented in this section, tourism marketing is working to build the bottom line for Greater Philadelphia businesses, hotels, governments and residents.
2. **Leisure Tourism Facts and Figures:** Greater Philadelphia is now a popular overnight destination. Leisure tourism indicators are up dramatically from when GPTMC launched its first campaign in 1997. This shift from a half-day stop to an overnight destination impacts the economic vitality and quality of life in the region.

3. **Greater Philadelphia's Hotel Industry:** The story of tourism's impact is especially vivid and important for our hotel industry. In this section, we show the impact that tourism's growth has had on our hotels. For the past decade, GPTMC's marketing has helped to fill hotel rooms through hotel package offers and advertising, supporting the leisure segment that is a vital piece of a strong hotel market.
4. **Greater Philadelphia Visitor Profiles:** Crafting personalized marketing messages starts with developing a nuanced understanding of our visitors and their experience in Philadelphia. The visitor profiles in this section provide overviews on particular visitor segments, with demographic and trip-based information on Philadelphia's visitors in 15 categories.
5. **Greater Philadelphia Online: gophila.com and uwishunu.com:** No destination can be absent from the Internet, and GPTMC ensures that Greater Philadelphia is well represented when travelers are looking for a place to visit and planning their trip. In this section, we demonstrate how we measure, monitor and then manage Greater Philadelphia's online presence on **gophila.com**, the official tourism site for the region, and **uwishunu.com**, our insider's guide to the city.
6. **Making the Case for Tourism Marketing: It's an Investment, Not a Cost:** Tourism marketing has contributed to a four million-person increase in overnight leisure visitation over the past 10 years, bringing our total of overnight leisure visitors to 10.6 million in 2007. These visitors help to sustain our attractions and museums, hotels, restaurants and shops and yield returns for residents, businesses and city and state government. In this section, we focus on the Return on Investment (ROI) of tourism marketing. When a great destination is marketed effectively, it brings in more visitors, who in turn support even more restaurants, shops and attractions for locals and visitors alike to enjoy.
7. **Fast Facts about Tourism in Greater Philadelphia:** GPTMC's research program produces studies about our visitors and their impact on the region all year long. We use surveys, one-on-one interviews and focus groups to evaluate the effectiveness of our marketing. This chapter presents some top facts that have emerged from these research projects.

CHAPTER ONE
KEY VISITOR STATISTICS FOR GREATER PHILADELPHIA'S TOURISM INDUSTRY

Thirty million visitors to Greater Philadelphia

Visitation to Greater Philadelphia* is on the rise, increasing every year since 2001. In 2007, the total number of visitors to the region reached 30 million for the first time.

Greater Philadelphia Total Visitation, 2007: 30.11 million

- Domestic Visitors: 29.24 million
- International Visitors: 873,000

Domestic Visitors by Segment:

- Day Leisure: 12.77 million
- Overnight Leisure: 10.58 million
- Day Business: 3.93 million
- Overnight Business: 1.97 million

Visitation to Greater Philadelphia, 1997-2007

Year	Total Domestic Visitors	Overnight Leisure Visitors
1997	21.47 million	6.5 million
1998	21.87 million	7.4 million
1999	22.09 million	7.3 million
2000	22.85 million	7.3 million
2001	22.26 million	7.3 million
2002	23.74 million	8.4 million
2003	26.04 million	9.0 million
2004	27.42 million	10.0 million
2005	28.70 million	10.6 million
2006	28.80 million	10.4 million
2007	29.24 million	10.6 million
Increase, 1997-2007	**+ 7.8 million**	**+ 4.1 million**

Sources: Tourism Economics, Longwoods International

* Greater Philadelphia (also referred to as the Philadelphia region and Philadelphia and The Countryside®) consists of Bucks, Chester, Delaware, Montgomery and Philadelphia counties in Pennsylvania.

The Economic Impact of Tourism

- Visitors to Greater Philadelphia generated **$9.3 billion in economic impact** in 2007. That means more than $25 million circulates through our region each day because of the tourism industry.

  Source: Tourism Economics

- The region's tourism industry **employs 88,225 people,** representing 5% of regional jobs in 2007.

  Source: Tourism Economics

- The tourism industry generated **$1.3 billion in federal, state and local taxes** in the five-county region in 2007.

  Source: Tourism Economics

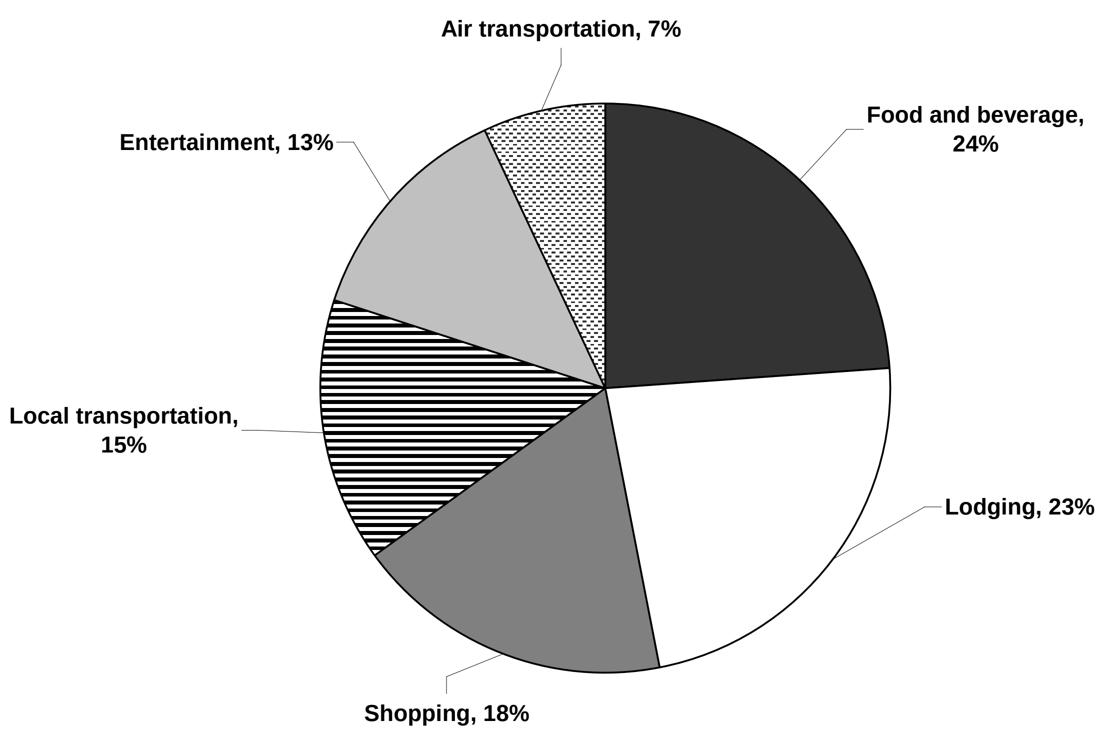
- Greater Philadelphia hotels sold more than **eight million room nights** in 2007, at a record **average daily rate of $129.**

  Source: Smith Travel Research

- Revenue for the Greater Philadelphia hotel industry **surpassed $1 billion** for the first time in 2007.

  Source: Smith Travel Research

Direct Visitor Spending by Sector, 2007
($5.8 billion)



Source: Tourism Economics

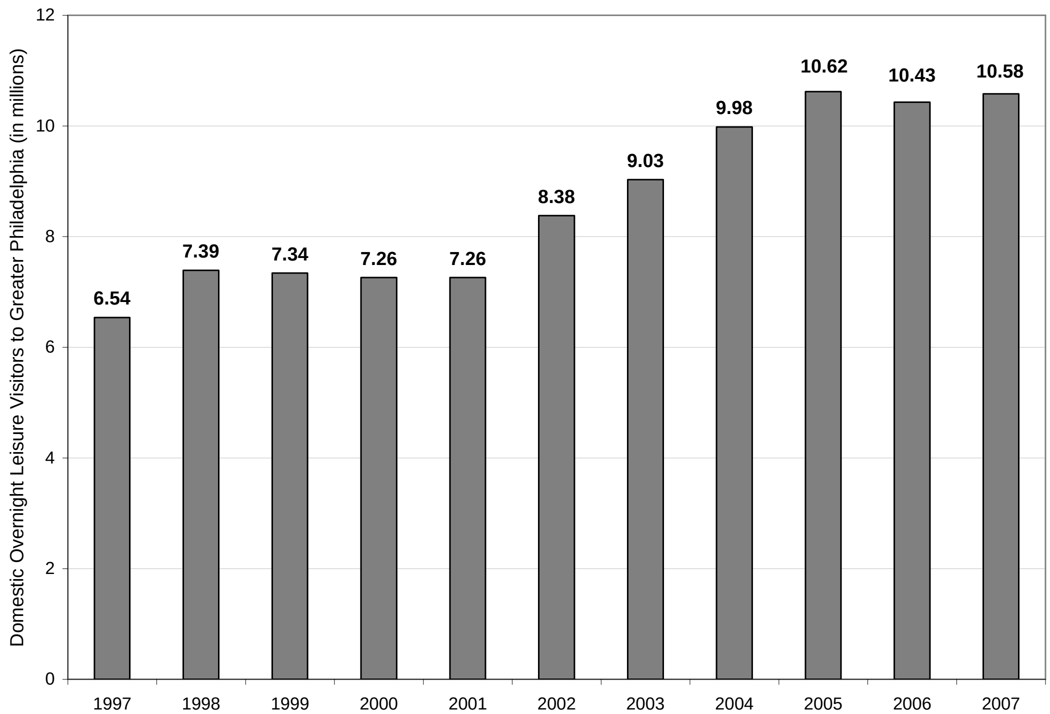
CHAPTER TWO

LEISURE TOURISM FACTS AND FIGURES

Four Million More Overnight Leisure Visitors in 10 Years

Four million more overnight leisure tourists visited Greater Philadelphia in 2007 than in 1997, when GPTMC began advertising. That represents **an increase of 63% in 10 years**, from 6.54 million to 10.58 million overnight leisure tourists.

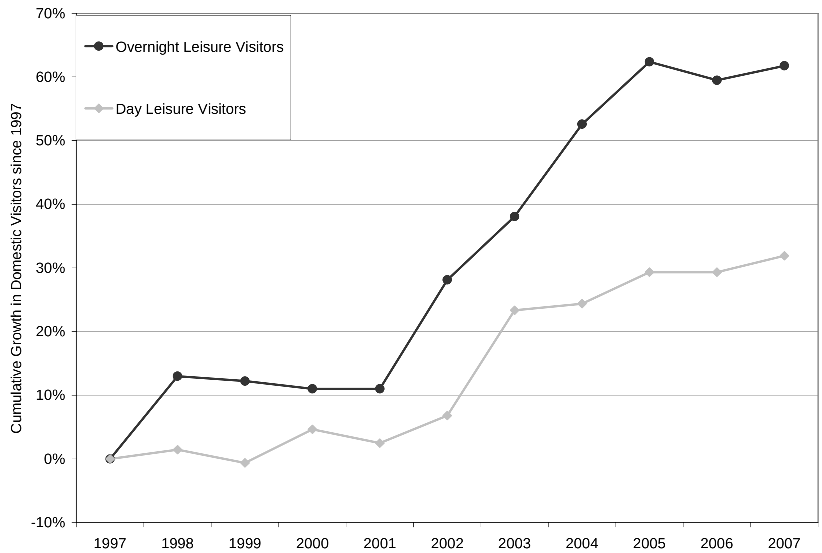
Domestic Overnight Leisure Visitors to Greater Philadelphia



Sources: Longwoods International, Tourism Economics

Over the past 10 years, overnight leisure trips to Greater Philadelphia have grown **twice as much as leisure day trips.** Day leisure trips have grown 32% and overnight leisure trips have grown 63%.

Increase in Day and Overnight Leisure Visitors

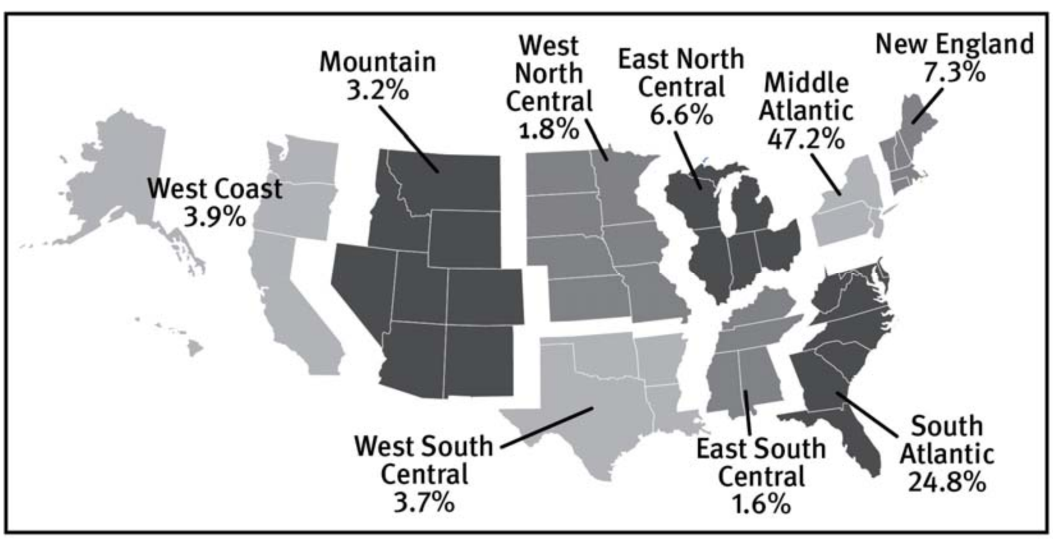


Sources: Tourism Economics, Longwoods International

Where Philadelphia's Visitors Come From

With one-quarter of the U.S. population within 350 miles of downtown Philadelphia, the majority of our visitors come from East Coast drive markets.

Overnight Visitors to Greater Philadelphia by Region, 2007



Sources: Longwoods International, Domestic Overnight Visitors, 2007

New York, Philadelphia and Washington, DC are the top markets of origin for visitors to Greater Philadelphia.

Overnight Leisure Visitors to Greater Philadelphia by DMA*, 2007

DMA	Rank	%
New York, NY	1	19.4%
Philadelphia, PA	2	15.1%
Washington, DC	3	6.6%
Wilkes Barre/Scranton, PA	4	5.0%
Boston, MA	5	4.9%
Harrisburg/Lncstr/Leb/York, PA	6	3.9%
Baltimore, MD	7	3.5%
Pittsburgh, PA	8	3.5%
Atlanta, GA	9	2.0%
Hartford & New Haven, CT	10	1.7%

Source: Longwoods International

Average Overnight Leisure Visitor Demographics, 2007

- Age: 42.6 years
- Annual Household Income: $77,946
- College Degree or Higher: 62%
- Length of Trip: 3.7 nights
- Length of Stay in Greater Philadelphia: 2.9 nights
- Travel Party Size: 2.5 people
- Traveling with Children: 27%

Source: Longwoods International

* A Designated Marketing Area (DMA) encompasses a city and all of the surrounding areas touched by that city's media markets. For example, the Philadelphia DMA extends beyond the five-county region to include parts of Central Pennsylvania, New Jersey and Delaware.

CHAPTER THREE

GREATER PHILADELPHIA'S HOTEL INDUSTRY

A Record-Breaking 2007

2007 was a record-breaking year for the Greater Philadelphia hotel industry, based on the convergence of individual leisure, group, business and convention travel. The well-marketed and well-attended King Tut exhibition at The Franklin Institute Science Museum (which welcomed more than 1.3 million visitors), a strong year for conventions and a steady stream of events and meetings made 2007 a stand-out year for hotels.

GPTMC supports regional hotels year-round through marketing that brings more tourists to the region. We also offer custom hotel packages available on **gophila.com** and through individual hotels.

- In 2007, revenue for the Greater Philadelphia hotel industry **surpassed $1 billion** for the first time.
- Greater Philadelphia hotels sold more than **eight million room nights** in 2007, at a record **average daily rate (ADR) of $129.**
- Hotel occupancy in **Center City Philadelphia was 74.1**% in 2007, the highest since 1949.

Sources: PKF Consulting, Smith Travel Research

Greater Philadelphia Hotel Industry Facts and Figures, 2007

	Regional	Center City
Daily Supply	31,662 rooms	10,194 rooms
Total Supply	11,481,624 rooms	3,613,762 rooms
Total Demand	8,018,585 rooms	2,678,603 rooms
Occupancy	69.8%	74.1%
ADR	$129.61	$167.56
Total Revenue	$1,039,296,946	$458,569,883

Sources: PKF Consulting, Smith Travel Research

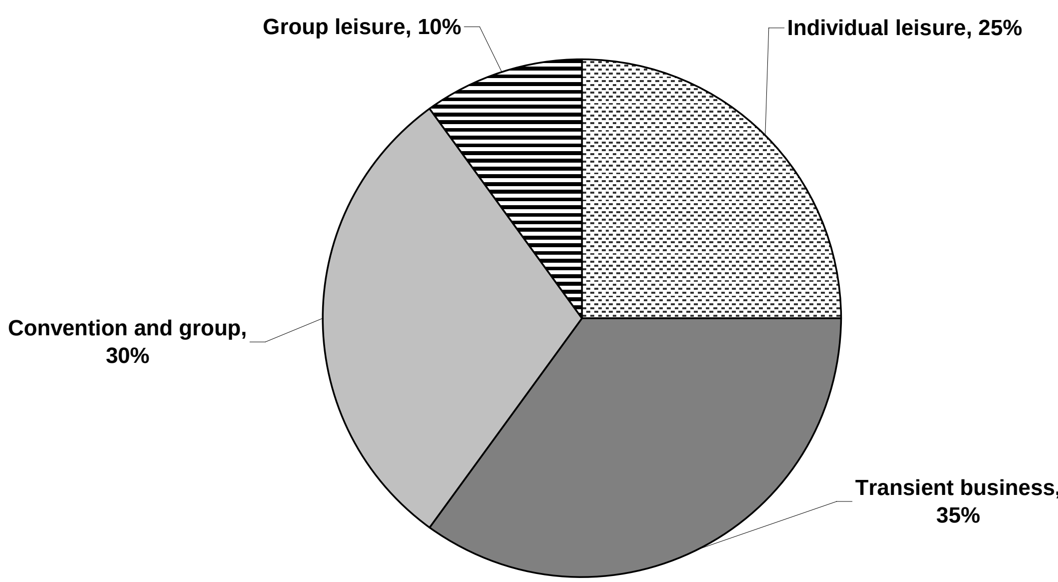
Market Mix

It takes all segments—business, leisure, conventions and groups—to keep Philadelphia's hotels filled night after night.

- Individual **leisure travelers are the second largest segment** for our Center City hotels after transient business travelers, accounting for 678,000 of the 2.69 million room nights sold in Center City in 2007, or 25%.
- Visitors staying in hotels for group leisure purposes (weddings, bar mitzvahs, family reunions, etc.) account for another 10% of Center City's occupied hotel rooms.
- **Saturday night,** the most popular night for leisure tourists**, has been the highest night** of the week for hotel occupancy in Center City for the past three years—at more than 80% each year.

Sources: PKF Consulting, Smith Travel Research

Center City Hotel Market Mix, 2007



Source: PKF Consulting

Growth for Center City Hotels

In recent years, Philadelphia hotels have enjoyed impressive hotel occupancy and rising ADRs unmatched in the previous two decades.

Center City Hotel Occupancy and ADR, 1990-2008

Year	Occupancy	ADR	Year	Occupancy	ADR
1990	64.0%	$92.00	2000	63.6%	$141.42
1991	59.0%	$90.00	2001	60.2%	$134.06
1992	64.0%	$90.00	2002	66.0%	$138.58
1993	65.0%	$91.00	2003	66.4%	$130.14
1994	67.1%	$96.00	2004	70.8%	$133.44
1995	68.5%	$104.00	2005	72.5%	$145.42
1996	73.0%	$117.00	2006	73.6%	$156.08
1997	73.4%	$123.96	2007	74.1%	$168.50
1998	71.5%	$134.85	2008*	73.0%	$173.73
1999	68.2%	$136.63			

Sources: PKF Consulting, Smith Travel Research

Since 2000, **the growth in hotel occupancy** in Center City Philadelphia far outpaces the national trend and our competitive East Coast destinations. Our **ADR has climbed an impressive 19.1% since 2000.**

Center City and Competitive Downtown Hotel Occupancy and ADR, 2000-2007

	National		Philadelphia		Boston		Washington, DC		Baltimore	
Year	**Occupancy**	**ADR**	**Occupancy**	**ADR**	**Occupancy**	**ADR**	**Occupancy**	**ADR**	**Occupancy**	**ADR**
2000	63.2%	$85.22	63.6%	$141.42	79.0%	$197.35	72.8%	$149.90	72.0%	$132.19
2001	60.9%	$83.99	60.2%	$134.06	69.5%	$176.59	66.4%	$152.12	65.8%	$131.76
2002	59.0%	$82.75	66.0%	$138.58	71.2%	$160.94	68.6%	$148.58	66.5%	$132.79
2003	59.2%	$82.86	66.4%	$130.14	70.9%	$149.45	68.9%	$147.42	65.9%	$130.01
2004	61.3%	$86.24	70.8%	$133.44	74.3%	$163.16	72.6%	$160.59	68.0%	$136.68
2005	63.1%	$90.90	72.5%	$145.42	74.7%	$170.44	74.5%	$179.62	70.4%	$144.26
2006	63.3%	$97.31	73.6%	$156.08	76.3%	$188.99	71.0%	$189.87	66.6%	$151.52
2007	62.9%	$103.63	74.1%	$168.50	76.2%	$204.77	73.6%	$203.83	65.5%	$159.97
% Change 2000-2007	**-0.5%**	**21.6%**	**16.5%**	**19.1%**	**-3.5%**	**3.8%**	**1.1%**	**36.0%**	**-9.0%**	**21.0%**

Sources: PKF Consulting, Smith Travel Research

* 2008 figures are year to date through November. Through November 2007, occupancy was 75.7% and ADR was $168.61.

CHAPTER FOUR

GREATER PHILADELPHIA VISITOR PROFILES

Crafting personalized marketing messages starts with developing a nuanced understanding of our visitors and their experience in Philadelphia. GPTMC seeks out as much information as possible from our visitors through focus groups, online surveys and interviews with visitors on the streets. In addition, we use Longwoods International's nationally syndicated 2007 TravelsUSA® survey to take a broader view of our visitors and find out where they come from, why they visit and what they do while they're here.

Statistics presented in this section are based on Longwoods International's 2007 TravelsUSA® survey:

- National sample: 143,751 overnight travelers
- Visitors to Philadelphia sample: 1,121 overnight visitors

We have categorized visitors by trip types, activities and points of origin. Visitor profiles for each segment feature:

- Demographics chart (age, income, point of origin, etc.)
- Additional profile information
- Visitor activities
- Further research
  - Other relevant GPTMC data/studies available at **gophila.com/research** or from GPTMC upon request
- Comparisons to the "average" visitor, which is defined throughout this section by the mathematical average of all overnight visitors to Greater Philadelphia

Profiles are developed for visitors to Philadelphia in each of the following segments:

Trip Types:	**Activity Profiles:**	**Traveler Profile:**
Visiting friends and relatives	Arts and culture	Urban markets
Discretionary leisure	Historic sites	Rural markets
Business	Brewery/Winery	Mid-Atlantic
Special event	Nightlife	Winter
	Outdoors	Spring
		Summer
		Fall

Trip Type: Visiting Friends and Relatives (VFR)

"Visiting friends and relatives," or VFRs, are travelers in town to see friends and family. These visitors may or may not stay in a hotel.

- Share of all 2007 overnight Philadelphia visitors: **51.3%**
- Share of all 2007 national travelers: **42.3%**

Overnight VFR Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**VFR**	**All Overnight**
Age (years)	42.9	43.1
Annual household income	$74,501	$80,659
Mid-Atlantic region	43.9%	47.2%
Length of stay (nights)	3.01	2.84
Staying in a hotel	34.5%	61.5%
Trip spending (per party)	$399	$515
Use of Internet (plan trip)	35.6%	50.1%
Use of Internet (book trip)	39.9%	45.6%
Sample size	562	1,121

Additional Profile Information

- Just 39% of VFR visitors to Philadelphia have children under 18 in their households.
- Spending is lower, primarily because of the lower amount spent on lodging ($91).
  - VFR visitors spend nearly as much as the average visitor on food/beverage ($125) and recreation ($40).
  - VFR visitors spend slightly more than the average visitor on retail ($109).

Visitor Activities

- VFR visitors are less active than the average visitor.
  - 31% choose "none of the above" for activities.
- VFR visitors are more likely than average to shop on their trip (38%).
- Top activities of VFR visitors include shopping (38%), fine dining (21%), bars/discos/nightclubs (11%), landmarks/historic sites (11%) and museums (8%).

Further Research

- GPTMC's seasonal hotel visitor surveys include a segment of downtown hotel visitors who are staying with friends and relatives. The survey gives us profile information, including spending, top attractions, activities and points of origin.

Trip Type: Discretionary Leisure

"Discretionary leisure" visitors (also called "marketable trips") are leisure visitors who are not visiting friends or relatives.

- Share of all 2007 overnight Philadelphia visitors: **26.7%**
- Share of all 2007 national travelers: **39.1%**

Overnight Discretionary Leisure Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Discretionary Leisure**	**All Overnight**
Age (years)	41.9	43.1
Annual household income	$84,387	$80,659
Mid-Atlantic region	60.3%	47.2%
Length of stay (nights)	2.73	2.84
Staying in a hotel	93.2%	61.5%
Trip spending (per party)	$646	$515
Use of Internet (plan trip)	65.9%	50.1%
Use of Internet (book trip)	59.8%	45.6%
Sample size	302	1,121

Additional Profile Information

- 81% of discretionary leisure travelers are white/Caucasian—well above average.
- The top DMAs for discretionary leisure travelers are New York (23%) and Philadelphia (20%)—above average for both.
- Spending is above average in nearly all categories, including lodging ($235), food/beverage ($170), retail ($109) and recreation ($88).

Visitor Activities

- Trips are filled with typical "tourist" activities, such as museums (37%), landmarks/historic sites (34%), art galleries (14%), shopping (40%) and fine dining (35%).
- Only 9% selected "none of the above" for activities.

Trip Type: Business

"Business travelers" are in the Philadelphia region for a convention or business meeting or other business-related activity.

- Share of all 2007 overnight Philadelphia visitors: **18.2%**
- Share of all 2007 national travelers: **14.4%**

Overnight Business Travelers

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Business**	**All Overnight**
Age (years)	45.2	43.1
Annual household income	$93,382	$80,659
Mid-Atlantic region	35.7%	47.2%
Length of stay (nights)	2.62	2.84
Staying in a hotel	90.1%	61.5%
Trip spending (per party)	$621	$515
Use of Internet (plan trip)	54.8%	50.1%
Use of Internet (book trip)	52.1%	45.6%
Sample size	220	1,121

Additional Profile Information

- Business travelers are better educated than the average visitor.
  - 72% have college degrees or higher (72%), and 36% have graduate degrees.
- This segment is mostly male: 62% in Philadelphia and 69% nationwide.
- Spending is high on lodging ($335, highest of any trip type) and food/beverage ($148).
  - Business travelers spend less than average on retail ($54) and recreation ($28).
- 91% of overnight business trips come from outside the Philadelphia DMA.

Visitor Activities

- Business travelers participate in far fewer tourist activities than any category of leisure visitors.
- Top activities of overnight business travelers include fine dining (23%), shopping (18%), landmarks/historic sites (10%), bars/discos/nightclubs (9%) and museums (9%).

Further Research

- GPTMC's 2007 in-hotel intercept surveys included business travelers and detailed their leisure activities in Philadelphia and their willingness to extend their stay.

Trip Type: Special Event

A "special event" includes a festival, parade, special exhibition or personal event.

- Share of all 2007 overnight Philadelphia visitors: **18.2%**
- Share of all 2007 national travelers: **14.4%**

Overnight Special Event Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Special Event**	**All Overnight**
Age (years)	47.3	43.1
Annual household income	$92,622	$80,659
Mid-Atlantic region	49.2%	47.2%
Length of stay (nights)	2.05	2.84
Staying in a hotel	87.8%	61.5%
Trip spending (per party)	$686	$515
Use of Internet (plan trip)	62.6%	50.1%
Use of Internet (book trip)	59.6%	45.6%
Sample size	100	1,121

Additional Profile Information

- Special event travelers are 84% white/Caucasian—well above average.
- The top DMAs for special event visitors are New York (23%) and Washington, DC (12%)—above average for both markets.
- Spending is well above average on food/beverage ($219) and recreation ($94).

Visitor Activities

- Special event visitors are likely to attend professional sporting events (19%), fairs/exhibitions/festivals (16%) and bars/discos/nightclubs (21%).
- Special event visitors are less likely than others to include shopping (22%) or fine dining (27%) in their trips.

Further Research

- GPTMC commissioned event impact reports on the King Tut, Salvador Dalí and Ben Franklin 300 exhibitions. The reports detail the economic impact of each event, including how many visits were generated to other regional attractions.

Activity Profile: Arts and Culture

"Arts and culture" visitors either visited an art gallery or museum or attended a theater, opera, dance or orchestra performance on their trip.

- Share of all 2007 overnight Philadelphia visitors: **25.0%**
- Share of all 2007 national travelers: **14.7%**

Overnight Arts and Culture Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Arts and Culture**	**All Overnight**
Age (years)	43.9	43.1
Annual household income	$81,882	$80,659
Mid-Atlantic region	50.9%	47.2%
Length of stay (nights)	3.52	2.84
Staying in a hotel	77.9%	61.5%
Trip spending (per party)	$641	$515
Use of Internet (plan trip)	55.7%	50.1%
Use of Internet (book trip)	50.5%	45.6%
Sample size	284	1,121

Additional Profile Information

- Arts and culture visitors are highly educated: 62% have a college degree or higher.
- Nearly half (48%) have children in their households (slightly above average).
- Spending is above average on lodging ($229), food/beverage ($156) and recreation ($96, includes tickets to arts/culture events).

Visitor Activities

- In addition to arts and culture events, these visitors are very active all around.
  - Their trips to Philadelphia also include shopping (52%), landmarks/historic sites (48%), fine dining (48%) and bars/discos/nightclubs (20%).

Further Research

- GPTMC's seasonal hotel visitor surveys report on what downtown hotel visitors do with their time. Visits often include an arts and culture component.

Activity Profile: Historic Sites

"Historic sites" travelers visited either an historic site/landmark or a state/national park on their trip.

- Share of all 2007 overnight Philadelphia visitors: **22.5%**
- Share of all 2007 national travelers: **18.6%**

Overnight Historic Site Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Historic Sites**	**All Overnight**
Age (years)	46.7	43.1
Annual household income	$82,424	$80,659
Mid-Atlantic region	40.3%	47.2%
Length of stay (nights)	3.74	2.84
Staying in a hotel	72.6%	61.5%
Trip spending (per party)	$634	$515
Use of Internet (plan trip)	61.7%	50.1%
Use of Internet (book trip)	55.5%	45.6%
Sample size	260	1,121

Additional Profile Information

- Historic sites visitors are highly educated: 63% have a college degree or higher.
- This group is more likely than average to have children in their household (48%).
- These travelers are more likely than average to be from "rural" markets (17%).
- 9% of Philadelphia historic site visitors are business travelers.
- Spending is higher than average ($634), primarily due to extended length of stay.
    - These visitors spend more than average on lodging ($247), food/beverage ($172) and recreation ($86).

Visitor Activities

- In addition to visiting historic sites, these visitors are likely than average to do other high-end activities, such as shopping (55%), fine dining (53%), museums (53%) and art galleries (19%).

Further Research

- GPTMC conducted comprehensive intercept surveys of visitors to Historic Philadelphia in summer 2007 and summer 2008, as well as an economic impact study of Historic Philadelphia tourism in 2007.

Activity Profile: Brewery/Winery

"Brewery/Winery" visitors visited either a brewery or winery on their trip.

- Share of all 2007 overnight Philadelphia visitors: **4.6%**
- Share of all 2007 national travelers: **4.6%**

Overnight Brewery/Winery Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Brewery / Winery**	**All Overnight**
Age (years)	43.6	43.1
Annual household income	$90,626	$80,659
Mid-Atlantic region	42.5%	47.2%
Length of stay (nights)	2.7	2.84
Staying in a hotel	100.0%	61.5%
Trip spending (per party)	$640	$515
Use of Internet (plan trip)	80.2%	50.1%
Use of Internet (book trip)	70.9%	45.6%
Sample size	51	1,121

Additional Profile Information

- Brewery/winery visitors are heavily male (71%).
- 52% have children in their households (above average).
- This group spends more than average ($640) in virtually all categories.
    - They spend more than average on lodging ($234), food/beverage ($172) and recreation ($89).

Visitor Activities

- Brewery/winery visitors are among the most active of any segment, with above average participation in shopping (67%), fine dining (44%), bars/discos/nightclubs (36%), landmarks/historic sites (31%), museums (23%), art galleries (20%) and cultural performances (14%).

Further Research

- In 2006, TIA released a report on "Wine and Culinary Travel," which sized the market at 17% of all leisure trips.

Activity Profile: Nightlife

"Nightlife" visitors went to a bar/disco/nightclub or a rock/pop concert on their trip.

- Share of all 2007 overnight Philadelphia visitors: **17.0%**
- Share of all 2007 national travelers: **13.8%**

Overnight Nightlife Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Nightlife**	**All Overnight**
Age (years)	36.9	43.1
Annual household income	$77,156	$80,659
Mid-Atlantic region	52.3%	47.2%
Length of stay (nights)	2.9	2.84
Staying in a hotel	66.2%	61.5%
Trip spending (per party)	$734	$515
Use of Internet (plan trip)	54.1%	50.1%
Use of Internet (book trip)	48.3%	45.6%
Sample size	186	1,121

Additional Profile Information

- Nightlife visitors are less likely than average to hold a college degree or higher (53%), likely due to their significantly lower average age.
- 21% of nightlife visitors are African-American.
- Nightlife visitors are likely to be leisure travelers (87%).
- This segment of visitors spent nearly twice the average on food/beverage ($219) and on shopping ($163).

Visitor Activities

- Nightlife visitors participate at above-average rates in many other activities, including fine dining (45%), shopping (41%), art galleries (11%), cultural performances (10%), fairs/exhibitions/festivals (7%) and breweries (7%).

Activity Profile: Outdoors

"Outdoors" visitors participated in one of the following activities on their trip: beach/waterfront, biking, boating/sailing, camping, fishing, golf, hiking/backpacking, hunting, mountain climbing, rafting, skiing/snowboarding, swimming or tennis.

- Share of all 2007 overnight Philadelphia visitors: **16.8%**
- Share of all 2007 national travelers: **33.2%**

Overnight Outdoors Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Outdoors**	**All Overnight**
Age (years)	38.9	43.1
Annual household income	$72,935	$80,659
Mid-Atlantic region	52.0%	47.2%
Length of stay (nights)	3.9	2.84
Staying in a hotel	67.1%	61.5%
Trip spending (per party)	$594	$515
Use of Internet (plan trip)	57.4%	50.1%
Use of Internet (book trip)	49.5%	45.6%
Sample size	171	1,121

Additional Profile Information

- Outdoor visitors are less likely than average to hold a college degree or higher (52%), likely due to their significantly lower average age.
- 57% of outdoor visitors have children in the household—well above average (45%).
- Many outdoor visitors (21%) come from within the Philadelphia DMA.

Visitor Activities

- Outdoor travelers are less likely than most segments to visit a fine dining restaurant on their trip to Philadelphia (33%).
  - They are more likely than average to participate in the following activities: shopping (51%), museums (38%), landmarks/historic sites (35%) and national/state parks (17%).

Further Research

- GPTMC conducted surveys of the outdoor activities of both out-of-town and local travelers in association with the **Boundless Philadelphia**® campaign to determine top outdoor activities and to gauge visitors' perception of Philadelphia as an outdoor vacation destination.

Traveler Profile: Urban Markets

"Urban" visitors come from areas classified by the U.S. Census Bureau as "highly urban" based on a population density of at least 1,000 people per square mile.

- Share of all 2007 overnight Philadelphia visitors: **59.9%**
- Share of all 2007 national travelers: **42.2%**

Overnight Urban Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Urban**	**All Overnight**
Age (years)	42.2	43.1
Annual household income	$87,686	$80,659
Mid-Atlantic region	48.4%	47.2%
Length of stay (nights)	2.92	2.84
Staying in a hotel	60.4%	61.5%
Trip spending (per party)	$500	$515
Use of Internet (plan trip)	49.8%	50.1%
Use of Internet (book trip)	47.7%	45.6%
Sample size	611	1,121

Additional Profile Information

- Urban visitors to Philadelphia are about one-third minority: 14% African-American, 9% Latino and 5% Asian-American.
- The New York DMA is the top origin market for urban visitors at 31%, while 21% come from within the Philadelphia DMA.
- Spending by urban visitors is about average, with the exception of below-average spending on food/beverage ($124).

Visitor Activities

- Top activities for urban visitors closely mirror those of the average visitor, including shopping (39%), fine dining (32%), museums (19%), landmarks/historic sites (18%) and bars/discos/nightclubs (15%).

Traveler Profile: Rural Markets

"Rural" visitors come from areas classified by the U.S. Census Bureau as "rural" based on a population density of less than 500 people per square mile.

- Share of all 2007 overnight Philadelphia visitors: **13.7%**
- Share of all 2007 national travelers: **28.0%**

Overnight Rural Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Rural**	**All Overnight**
Age (years)	45.7	43.1
Annual household income	$68,993	$80,659
Mid-Atlantic region	34.0%	47.2%
Length of stay (nights)	2.74	2.84
Staying in a hotel	69.2%	61.5%
Trip spending (per party)	$576	$515
Use of Internet (plan trip)	53.6%	50.1%
Use of Internet (book trip)	43.1%	45.6%
Sample size	155	1,121

Additional Profile Information

- A below-average 42% of rural visitors have children in their households.
- Rural visitors spend well above average on food/beverage ($195) and retail ($112).
- 55% of rural visitors are visiting friends and relatives.

Visitor Activities

- Rural visitors are more likely than the average visitor to tour historic/cultural sites: landmarks/historic sites (26%), museums (21%), national/state parks (12%), art galleries (10%) and cultural performances (10%).
- The top activity for rural visitors is shopping (44%).

Traveler Profile: Mid-Atlantic

"Mid-Atlantic" visitors come from the Middle Atlantic region as defined by the U.S. Census Bureau: Pennsylvania, New Jersey and New York.

- Share of all 2007 overnight Philadelphia visitors: **47.2%**
- Share of all 2007 national travelers: **13.8%**

Overnight Mid-Atlantic Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Mid-Atlantic**	**All Overnight**
Age (years)	41.0	43.1
Annual household income	$73,396	$80,659
Mid-Atlantic region	100.0%	47.2%
Length of stay (nights)	2.36	2.84
Staying in a hotel	60.2%	61.5%
Trip spending (per party)	$445	$515
Use of Internet (plan trip)	41.8%	50.1%
Use of Internet (book trip)	37.0%	45.6%
Sample size	547	1,121

Additional Profile Information

- The majority of Mid-Atlantic visitors come from the New York (37%) or Philadelphia (27%) DMAs.
- Many Mid-Atlantic visitors are here purely as tourists:
  - 34% are discretionary leisure travelers.
  - 48% are visiting friends and relatives.
  - 14% are business travelers.
- Mid-Atlantic visitors spend less than average in all categories except for recreation/sightseeing ($55).

Visitor Activities

- The top activities for Mid-Atlantic visitors mirror those of all visitors: shopping (34%), fine dining (28%), museums (21%), landmarks/historic sites (18%) and bars/nightclubs/discos (16%).

Traveler Profile: Winter

"Winter" visitors came to Philadelphia in the first quarter (January-March) of 2007.

- Share of all 2007 overnight Philadelphia visitors: **28.5%**
- Share of all 2007 national travelers: **26.0%**

Overnight Winter Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Winter**	**All Overnight**
Age (years)	42.7	43.1
Annual household income	$81,737	$80,659
Mid-Atlantic region	49.1%	47.2%
Length of stay (nights)	2.38	2.84
Staying in a hotel	59.6%	61.5%
Trip spending (per party)	$497	$515
Use of Internet (plan trip)	52.1%	50.1%
Use of Internet (book trip)	47.6%	45.6%
Sample size	310	1,121

Additional Profile Information

- Winter visitors are the most likely to come from a highly urban market (66%).
- Winter has the highest portion of business travelers (21%).
- The top market in the winter is the New York DMA (20%), followed by the Philadelphia DMA (15%).
    - Winter is the top season for the Washington, DC DMA (9%).

Visitor Activities

- Winter visitors are the least likely to eat in a fine dining restaurant (26%).
- Winter visitors are the most likely to go to a rock/pop concert (3%).
- Top activities include shopping (37%), landmarks/historic sites (18%) and museums (18%).

Further Research

- GPTMC has conducted surveys with visitors booking their winter hotel stay through **gophila.com** each winter since 2004-2005.

Traveler Profile: Spring

"Spring" visitors came to Philadelphia in the second quarter (April-June) of 2007.

- Share of all 2007 overnight Philadelphia visitors: **19.3%**
- Share of all 2007 national travelers: **20.9%**

Overnight Spring Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Spring**	**All Overnight**
Age (years)	43.2	43.1
Annual household income	$79,426	$80,659
Mid-Atlantic region	46.8%	47.2%
Length of stay (nights)	2.62	2.84
Staying in a hotel	66.5%	61.5%
Trip spending (per party)	$619	$515
Use of Internet (plan trip)	45.9%	50.1%
Use of Internet (book trip)	43.6%	45.6%
Sample size	239	1,121

Additional Profile Information

- Spring visitors spend the most on their trip across the board, with notably high spending on lodging ($219) and food/beverage ($185).
    - May be driven by the two-thirds of spring visitors staying in hotels, the highest of any season
- Spring is the top season for visitation from the New York DMA (21%).

Visitor Activities

- Spring visitors participate in the fewest activities, with 25% selecting "none of the above."
- Top activities for spring visitors include shopping (33%), fine dining (32%), landmarks/historic Sites (21%), museums (18%) and bars/discos/nightclubs (11%).

Traveler Profile: Summer

"Summer" visitors came to Philadelphia in the third quarter (July-September) of 2007.

- Share of all 2007 overnight Philadelphia visitors: **29.8%**
- Share of all 2007 national travelers: **31.4%**

Overnight Summer Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Summer**	**All Overnight**
Age (years)	45.4	43.1
Annual household income	$79,271	$80,659
Mid-Atlantic region	42.1%	47.2%
Length of stay (nights)	2.97	2.84
Staying in a hotel	62.0%	61.5%
Trip spending (per party)	$478	$515
Use of Internet (plan trip)	48.2%	50.1%
Use of Internet (book trip)	41.5%	45.6%
Sample size	353	1,121

Additional Profile Information

- Summer visitors are the least likely to come from a highly urban market (52%) and the most likely to come from a rural market (17%).
- Summer has the highest portion of discretionary leisure visitors (33%) who are traveling purely for a vacation.

Visitor Activities

- Summer visitors are the most likely to tour historic and cultural sites: landmarks/Historic sites (26%), museums (25%), national/state Parks (11%), art galleries (10%).
- Summer visitors are also most likely to attend professional sporting events (7%), fairs/exhibitions/festivals (7%) and cultural performances (6%).

Further Research

- GPTMC has conducted surveys with visitors booking their summer hotel stay through **gophila.com** each summer since 2004.

Traveler Profile: Fall

"Fall" visitors came to Philadelphia in fourth quarter (October-December) of 2007.

- Share of all 2007 overnight Philadelphia visitors: **22.4%**
- Share of all 2007 national travelers: **21.8%**

Overnight Fall Visitors

	Overnight Visitors to Greater Philadelphia, 2007	
Measure	**Fall**	**All Overnight**
Age (years)	40.4	43.1
Annual household income	$81,798	$80,659
Mid-Atlantic region	51.8%	47.2%
Length of stay (nights)	3.49	2.84
Staying in a hotel	59.4%	61.5%
Trip spending (per party)	$499	$515
Use of Internet (plan trip)	53.8%	50.1%
Use of Internet (book trip)	50.4%	45.6%
Sample size	219	1,121

Additional Profile Information

- Fall has the highest portion of travelers visiting friends and relatives (58%).
  - VFR represents more than 60% of visitors in the holiday months of November and December.
- The top markets for fall visitors are the New York (21%) and Philadelphia (16%) DMAs.
- Despite lower overall spending in fall, food/beverage spending is above average at $162.

Visitor Activities

- Top activities for fall visitors include shopping (41%), fine dining (33%), bars/discos/nightclubs (18%) and breweries (5%).

CHAPTER FIVE
GREATER PHILADELPHIA ONLINE: GOPHILA.COM AND UWISHUNU.COM

A destination's online presence has an enormous impact on its "real world" visitation. Travel planning and travel booking have migrated online, and destinations must be there when travelers come searching. In addition, travelers' impressions and expectations are increasingly shaped by their online encounters with cities and destinations, whether that's in the news, on destination Web sites, on online travel sites (such as TripAdvisor) or through viewing videos and pictures on sites like YouTube and Flickr.

GPTMC's online marketing program includes our virtual visitors' center, **gophila.com**, and our insider's guide, **uwishunu.com**. By observing visitor activity on these sites, we can be responsive to our visitors and give them more to look at, more things they like to do and more ways to plan their trip. And, by learning about how travelers nationwide use the Internet for their travel planning and booking, GPTMC can ensure that travelers are introduced to Philadelphia through **gophila.com** and **uwishunu.com** first.

How does this work?

- **We observe how our online visitors use gophila.com**, and this practice provides insight into what we should offer and highlight on the site. This section includes:
    - Site visitation statistics
    - **gophila.com** as a trip-planning tool
    - Visitor engagement with **gophila.com**
    - Landing pages on **gophila.com**
    - Homepage design
    - Hotel bookings on **gophila.com**

- **We also observe how travelers use the Internet** for their travel searches and planning. We track the language travelers use as they seek information to learn what they're interested in and what competitive travel sites they find. This section includes:
    - Competitive destination sites
    - **gophila.com** search rankings
    - Consumer-focused language
    - Consumer-generated media

Observed Behavior on gophila.com

Site Visitation

Visits to **gophila.com** have increased 107% since 2003, and page views have increased 216%, demonstrating both the migration of travel planning online and the ability of **gophila.com** to be responsive to visitors' interests.

gophila.com Visitation, 2003-2007

Year	Visits	Page Views
2003	2,786,549	9,590,291
2004	2,978,425	14,828,570
2005	3,606,045	17,532,050
2006	4,535,909	24,964,358
2007*	5,767,281	30,307,872
% Growth 2003-2007	**107%**	**216%**

Source: Web Trends, Google Analytics

gophila.com enjoys significant international visitation—around 6% annually—and a national reach well beyond the Philadelphia region.

gophila.com Domestic and International Visitation, 2008**

Domestic Traffic: 94%			International Traffic: 6%		
Rank	State	% of Domestic	Rank	Country	% of Intl
1	Pennsylvania	42%	1	Canada	20%
2	New Jersey	13%	2	United Kingdom	17%
3	New York	10%	3	Germany	5%
4	California	3%	4	Australia	3%
5	Maryland	3%	5	France	3%

Source: Google Analytics

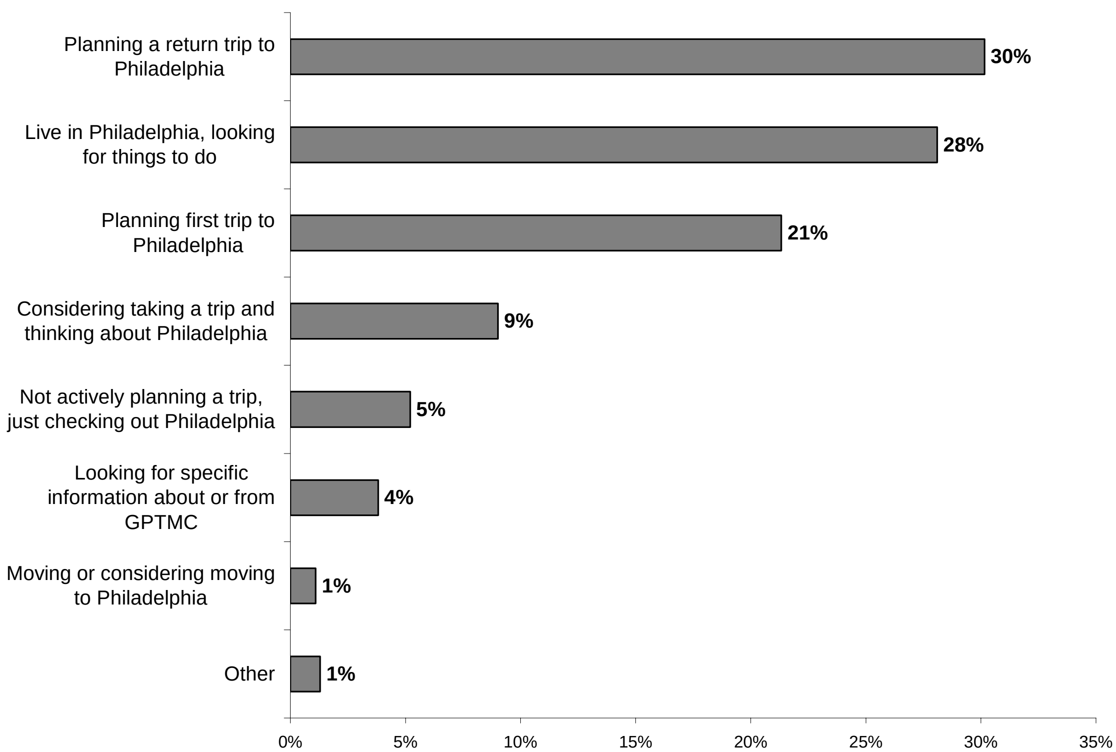
* 2007 figures include uwishunu.com.
** 2008 figures are year to date through October.

gophila.com as a Trip-Planning Tool

Most **gophila.com** visitors are on the site to plan their trip, but a considerable portion still need to be persuaded that Philadelphia is the place for them to visit.

The results from a survey conducted on **gophila.com** show that half of site visitors (51%) are actively planning a trip; 28% live in the area and are looking for activities (which they often share with visiting friends and relatives); and 9% are considering a trip and are using **gophila.com** to help them decide.

Why Visitors Visit gophila.com



Source: gophila.com onsite survey, October-November 2008

Visitor Engagement

Increasing engagement with our site is a key goal since we know that visitors who stay on **gophila.com** longer are also more likely to investigate booking a hotel room. Therefore, we keep track of what engages our visitors the most and how to increase their level of interaction with the site.

A presentation at the 2008 Travel and Tourism Research Association conference in Philadelphia emphasized that more time spent on a destination Web site translates into a greater likelihood to visit the destination and higher spending during the visit. Our **gophila.com** data support this assessment.

As the number of pages viewed on **gophila.com** rises, so does the use of our hotel booking widget—the mechanism visitors use to check out hotel rates and book their stay. (Many visitors ultimately book their trip outside of **gophila.com**—on another travel site or with the hotel directly.) The table below demonstrates that visitors who view more than five pages of **gophila.com** content are three times as likely to search for a hotel room on our site as those who do not.

gophila.com Increases Intent to Visit

Depth of Visit (Pages)	Portion of Total Visits	Using Booking Widget
1-4	68.5%	3.1%
5-9	16.3%	9.0%
10-19	9.7%	10.2%
20+	5.5%	10.6%

Source: Google Analytics: all gophila.com visits, January-October 2008

Landing Pages

Like our region, **gophila.com** has no single "front door." People can arrive at **gophila.com** through a search that leads them to a specific attraction or event listing, from an online advertisement that leads them to a specific hotel offer or by typing the URL into a browser. No matter how visitors arrive at **gophila.com**, we want to make sure they find something that is responsive, enticing and trip-worthy.

By designing landing pages for our top search terms, attractions and online advertising, we have improved site performance and visitors' experiences. In August 2008, **gophila.com** upgraded key landing pages by enhancing imagery and making interactive tools more accessible while deemphasizing copy. These changes led to an immediate improvement in the visitor experiences on these key pages, as demonstrated by a decreased bounce rate (visitors who leave after viewing just one page), longer visits to the site and more frequent use of both interactive mapping and the site's hotel booking widget.

gophila.com Upgraded Landing Pages, August 2008

Upgraded Landing Pages, August 2008	Bounce Rate		Time on Site		Interactive Map		Booking Widget	
	Pre	Post	Pre	Post	Pre	Post	Pre	Post
Liberty Bell	46.1%	33.2%	3:44	4:40	16.3%	30.3%	1.7%	2.3%
Comcast Center	55.5%	66.4%	1:28	1:56	4.4%	12.0%	0.6%	0.0%
First Friday	61.5%	40.0%	2:29	4:31	10.1%	29.8%	0.1%	0.6%
Summer Concert Series	42.0%	35.4%	2:47	3:35	2.7%	9.9%	1.2%	2.4%
Independence Hall	34.8%	24.3%	4:29	4:47	12.6%	23.1%	1.9%	1.6%
Average change	**-16.9%**		**30.3%**		**127.8%**		**24.1%**	

Source: Google Analytics

Homepage Design

Almost half of **gophila.com** visitors view the homepage at some point during their visit (no matter which front door they use to get into the site). Therefore, the look, feel and functionality of the homepage are crucial to the visitor experience. In June 2008, **gophila.com** debuted a new, widened homepage to take advantage of current computer monitor standards. The wider homepage allowed for a full-width rotating billboard, designed to immediately draw the eye of the viewer.

- In the first month, the average time spent on the homepage increased 11%.
- With the extra width, we were able to add a full-length banner for **uwishunu.com**, Philadelphia's insider blog, helping to make the most frequent "outbound" click from **gophila.com** in July and August of 2008.

Hotel Bookings on gophila.com

gophila.com books about 2% of the individual leisure hotel rooms occupied in Center City throughout the year (about 14,000 room nights annually). Travelers have many options for booking hotel rooms, and many leave **gophila.com** to book directly with the hotel of their choice (where they can often get reward points) or with another third-party travel site, such as Travelocity, Expedia or Orbitz.

While the number of hotel rooms booked on **gophila.com** represents only a small portion of leisure room nights booked in the city and region, hundreds of thousands of visitors check out dates and rates through our hotel booking widget and end up booking on another site or with the hotel directly. We can learn a lot by tracking those who check out room rates and availability on the site ("hotel referrals"). In 2007, there were more than 350,000 hotel referrals on **gophila.com.** These "referrers" help us learn how well the site "closes the sale," converting site visitors into Philadelphia visitors.

Since hotel booking capability was added in mid-2003, **gophila.com** has booked more than **$10 million in hotel revenue** for Greater Philadelphia hotels, with more than **10,000 reservations made on gophila.com annually**.[*]

Each season we survey the thousands of visitors who book on **gophila.com** and ask about their stay: what they did, why they visited, how much they spent and if they were satisfied and intend to return. Findings from our seasonal hotel visitor surveys can be found on **gophila.com/research.**

[*] GPTMC's popular **Philly Overnight® Hotel Package**, which offers two nights and free parking, will mark its 100,000th booking in early 2009. This package has been available since 2001 and is available both on **gophila.com** and through hotels directly.

gophila.com Hotel Reservations, 2004-2007

Measure	2004	2005	2006	2007
Reservations created	15,593	11,740	9,453	10,119
Hotel referrals	369,917	428,899	409,668	354,972
Look to book	4.2%	2.7%	2.3%	2.9%
Hotel room nights	23,968	15,906	13,923	14,313
Average Daily Rate (ADR)	$104	$133	$142	$185
Hotel revenue	$2,503,958	$2,108,651	$1,979,200	$2,653,987

Sources: gophila.com, World Choice Travel, TravelHero

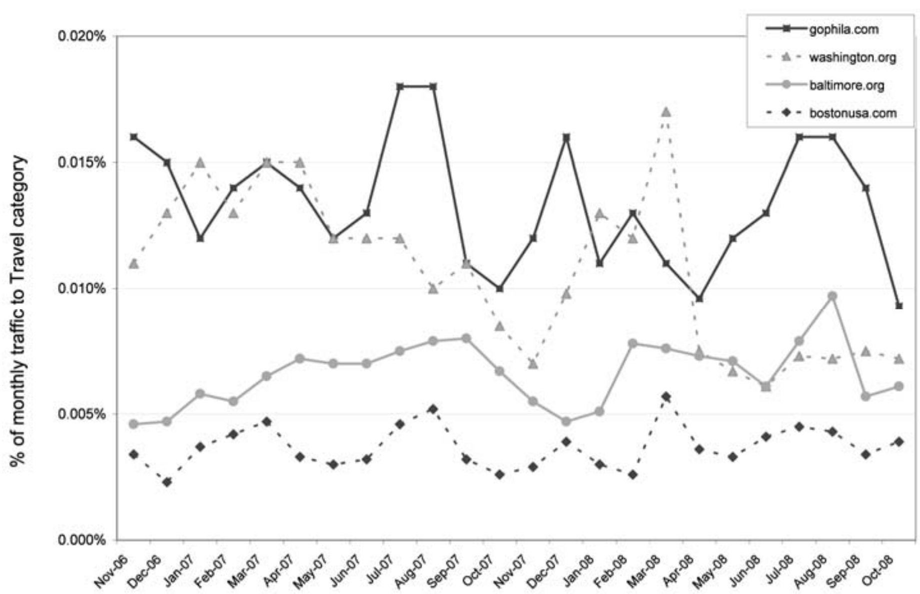
How Travelers Use the Internet

The online world provides GPTMC a window into what interests travelers about Philadelphia and how travelers search for and describe a vacation experience. GPTMC uses competitive Internet intelligence tracking from Hitwise, which monitors a panel of more than 10 million anonymous users as they move through the Internet. This program allows us to widen our view of the online travel world beyond **gophila.com**, to see where our site and our destination fit into the broader picture. Here’s a look at what we’ve learned:

Competitive Destination Sites

gophila.com traffic consistently rates ahead of traffic to competitive destination sites such as washington.org, baltimore.org and bostonusa.com:

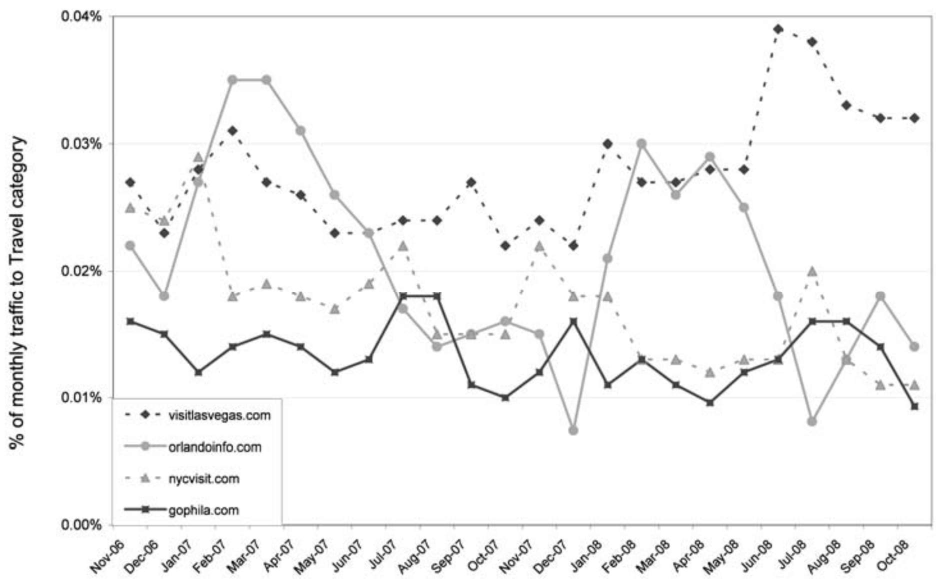
Monthly Traffic to gophila.com and Competitive Sites



Source: Hitwise

gophila.com traffic is typically lower than that of Web sites for the top travel destinations in the country, such as Las Vegas, Orlando and New York

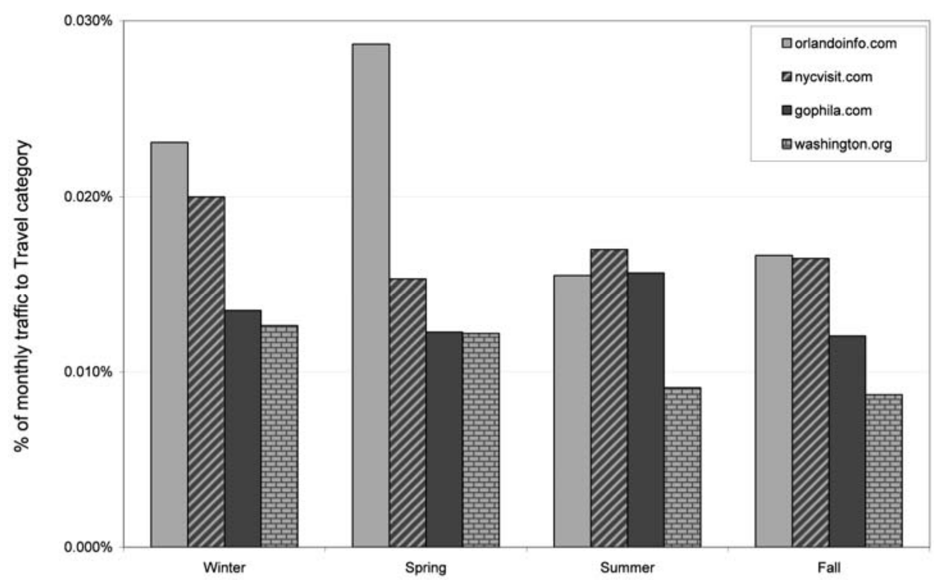
Monthly Traffic to gophila.com and Top Destination Sites



Source: Hitwise

Summer is the strongest time of the year for **gophila.com** traffic. In fact, over the past two summers, **gophila.com**'s market share has rivaled Orlando's and New York's, sites that have a much higher market share in the other seasons:

Seasonal Traffic to gophila.com and Competitive Sites



Source: Hitwise

Increasing Market Share for gophila.com

gophila.com presents Greater Philadelphia as a fun, accessible, authentic, historic place that's full of things to discover. When people are searching for Philadelphia information, we want them to find **gophila.com** first because we know the site will improve their image of the city and their likelihood to visit. Therefore, we try to maximize visitation to **gophila.com** among those searching for anything "Philadelphia." One way to maximize visitation is through paid and natural search optimization.

The goal is for **gophila.com** to be as high as possible in the rankings when Internet users employ search engines (such as Google or Yahoo). The higher **gophila.com** appears, the more likely searchers will click on our site. Effective search optimization ensures that **gophila.com** is high in search rankings, but in order to do this well, we need to know the answers to two questions:

1. What are travelers searching for when it comes to Philadelphia? What activities do they seek out, and what words do they use to describe them?
2. Does **gophila.com** appear on the first page for most frequent searches? For what terms do we need to move up in the ranks?

Hitwise competitive intelligence also allows us to see which other sites are gaining traffic from **gophila.com's** key search terms. This has helped us to refine our search strategy.

The table below shows that in the spring of 2008 when **gophila.com** relied almost exclusively on natural search, **gophila.com** was the top recipient of traffic from keywords in the Philadelphia Travel, Philadelphia (Generic) and Philadelphia Activities categories. Overall, the site received 12% of traffic from all of our key search terms. In the summer, using a combination of paid and natural search, **gophila.com** was able to increase its market share in all six groups, including attaining the #1 ranking for Philadelphia Hotels. During the summer, **gophila.com** received 20.8% of traffic from our key terms, an increase of 73% from the spring.

gophila.com Search Ranking, Spring and Summer 2008

Search Group	Spring Rank	Summer Rank	Spring %	Summer %
Philadelphia Travel	1	1	21.2%	44.0%
Philadelphia (Generic)	1	1	16.9%	24.3%
Philadelphia Activities	1	1	17.2%	17.1%
Philadelphia Restaurants	4	2	< 11.9%	15.8%
Philadelphia History	not ranked	4	-	8.9%
Philadelphia Hotels	7	1	< 6.5%	8.3%
Total (All Groups)	**1**	**1**	**12.0%**	**20.8%**

Search Groups: All search terms with enough volume to track relating to a particular topic.
Rank: Where **gophila.com** places among all sites receiving traffic from the group of search terms.
%: The portion of traffic from the group of search terms that is going to **gophila.com**.

Source: Hitwise

Consumer-focused Language

In the previous section, we described how observing and responding to visitor activity on **gophila.com** has allowed GPTMC to increase the impact of the site. Another more challenging way to respond to Internet users is to observe the language they use when they search for travel information online and adopt that language internally.

Adopting the language that Internet users themselves employ strengthens the impact of a Web site and also helps with natural search optimization. Once again, Hitwise competitive intelligence has allowed us to gain insight into the language travelers use.

In the table below, we compare sets of related keywords that visitors can use in a travel-related search. It is clear that some words are more user-friendly than others.

- Hitwise data indicated that the term "hotel" appeared in travel-related searches far more often than the term "accommodation," leading to a renaming of the accommodations category on **gophila.com** to "Places to Stay (Hotels in Philadelphia)." This switch has improved both search ranking and usability.
- The term "vacation" has nearly three times the search volume as the term "trip," with "getaway" even lower. **gophila.com** now uses "vacation" instead of "getaway" whenever possible to describe the Philadelphia destination experience.

Search Volume of Related Keywords

Keyword	Volume	Variations
Hotel	4.59%	1,724
Accommodation	0.02%	6
Vacation	0.77%	355
Trip	0.32%	45
Getaway	0.03%	19
Restaurant	0.04%	26
Food	0.02%	10
Dining	0.01%	6

Source: Hitwise: Top 10,000 searches in "Destinations & Accommodations" category, summer 2008

Consumer-generated Media

The Internet is increasingly interactive, with users becoming content providers as well as content consumers. News sites offer readers the chance to express their opinions online; travel sites (most notably TripAdvisor) allow readers to review and rate their experiences; and video sites (like YouTube) enable users to post their own videos.

GPTMC launched **uwishunu.com** (You Wish You Knew) in January 2007 to cater to tech-savvy visitors who wanted a more interactive experience with "virtual Philadelphia."

uwishunu.com is a site that features blogging, videos and content-sharing all focused on things to do in Philadelphia beyond the typical tourist experience. It relies on the credibility of its community of bloggers and commenters to bring exposure to the city's lesser-known gems. After nearly two years, **uwishunu.com** has built a stable audience, and GPTMC is now working to fully integrate the site's more personalized content and videos into **gophila.com**.

uwishunu.com features include:

- Eight categories: Video, Dining/Drinks, Nightlife, Weekend, Arts, Music, Shopping and Sports
- A "See What's Hot" section
- A uwishunu® Philly Itinerary
- "Top-Rated" and "Most Talked-About" posts of the week
- Five different downloadable background wallpapers

uwishunu.com visitation has grown steadily since its launch in January 2007:

- More than 700,000 total visits through summer 2008
- Visitors from all 50 states and more than 120 countries
- More than 2,000 posts yielding thousands of comments

Source: Google Analytics

Visitors surveyed on the site told us about **the impact of reading uwishunu.com**:

- 67% have recommended the site to friends or family
- 61% reported an increased interest in visiting Philadelphia
- 57% visited a featured place or business

Source: uwishunu.com onsite survey, fall 2007

Conclusion

The opportunity to present a virtual Philadelphia experience online through **gophila.com** and **uwishunu.com** enables GPTMC to enhance the image of Philadelphia and generate trips to the region as well. This online presentation of Philadelphia through our two sites is available 24/7 to respond to those interested in Philadelphia and can be improved constantly and immediately to be more responsive, relevant and effective.

In the coming months, **gophila.com** will be redesigned to become an even more effective marketing vehicle for Philadelphia, and **uwishunu.com** will be more fully integrated into the more heavily trafficked **gophila.com**. The new site design will be highly visual, emphasizing the diversity of vibrant, memorable experiences that are readily and abundantly available throughout the region. The site will use best practices in constructing a visual design and intuitive user-interfaces to ensure that potential visitors are compelled more powerfully than ever before. And of course, it will all be monitored and measured to help ensure its impact in improving perceptions of Greater Philadelphia and increasing visitation to our region.

CHAPTER SIX

MAKING THE CASE FOR TOURISM MARKETING: IT'S AN INVESTMENT, NOT A COST

Clearly tourism matters. It matters to the 88,000 people whose jobs depend on it in our region. It matters to the businesses that see $25 million per day flowing through our economy because of it. And it matters to the residents of our region who benefit from the $1.3 billion in taxes that are generated from it.

This kind of impact from tourism does not happen automatically. It depends on all aspects of our region working together to create a destination where visitors want to spend their days and nights. GPTMC contributes to the flow of tourists by spreading the word about Greater Philadelphia, closing the sale with visitors and making all of us who live here feel a little prouder about the region.

How do we know marketing works? Through research that studies the "before" and "after" effects of tourism marketing, GPTMC is able to improve on John Wanamaker's adage: "I know half of my advertising works. I just don't know which half." At GPTMC we do, in fact, know how well our advertising works.

In this section we outline the case for tourism marketing. Every city and region needs a cheerleader, an organization that highlights the region's assets, invites people to visit (and live and work) and tells the good stories when often it is too easy to focus on the challenges.

Here is why we do what we do every day at GPTMC:

1. Tourism marketing works.
2. If you don't invite them, they won't come.
3. Tourism is a replacement industry in Philadelphia.
4. Businesses that benefit from tourism are the backbone of the local economy.
5. Quality of life for residents has improved as tourism has grown.
6. Private investment in Philadelphia has increased as a result of the health of the tourism industry.
7. The tourism industry is made up of—and supports—other industries.
8. The Philadelphia renaissance is a national story.
9. Without tourism marketing, the negative threatens to outshine the positive.
10. Competition is growing among destinations.

1. Tourism marketing works.

GPTMC studies travelers before and after they have been exposed to our marketing. The result? Travelers have improved impressions of the destination, and they are more likely to visit and spend more money after they have been exposed to GPTMC's tourism marketing. **Before** being exposed to GPTMC's tourism marketing, travelers:

- Have **lower expectations** about what a Philadelphia experience will be like. From focus groups with those who haven't seen advertising, we hear:
    - "I just think of it as a place to go on a class trip."
    - "Nothing defines Philadelphia besides the Bell and the cheesesteaks, and that's not enough for a weekend."

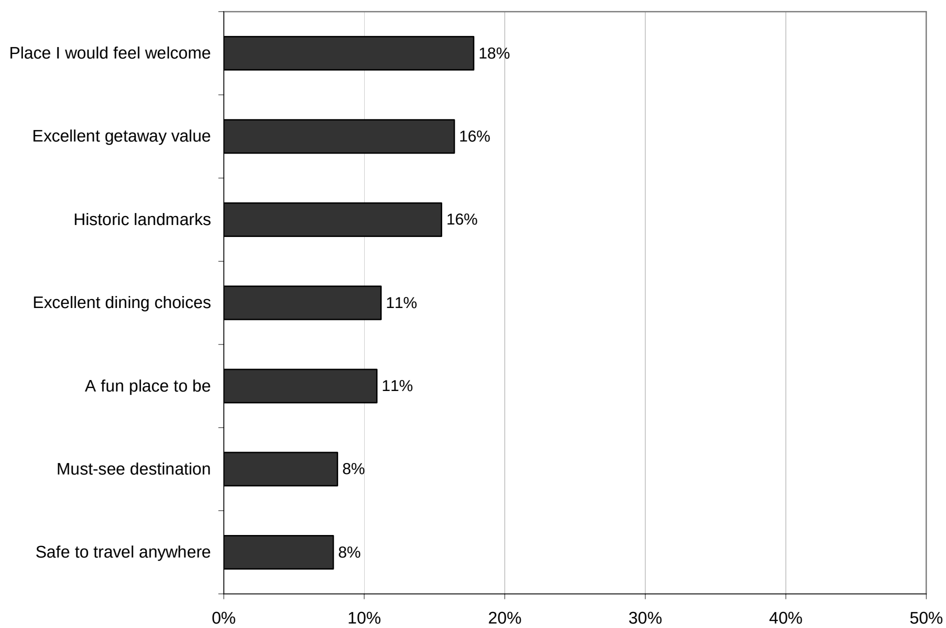
Source: GPTMC Focus Groups, fall 2008

- Associate Philadelphia with brands like Sears, Timex, Ford and Betty Crocker, calling the city "middle of the road" and "average."

Source: GPTMC Focus Groups, fall 2006

- Do not select Philadelphia as their "top pick" on a number of key trip dimensions. In a recent survey, when asked to select a preferred city among Philadelphia, Boston, Washington, DC and Baltimore on a variety of key attributes, **fewer than 20% of travelers** outside of the Philadelphia region selected Philadelphia in each of the key categories:

Philadelphia as a "Preferred City"



Source: TNS Travel and Transport Monthly survey for GPTMC, October 2007-September 2008

After being exposed to GPTMC's tourism marketing or a visit to Philadelphia, travelers:

- Are **satisfied, loyal and recommend a visit to Philadelphia:**
  - 90% have recommended a visit to Philadelphia to friends and family.
  - 99% said their trip to Philadelphia either met (55%) or exceeded (44%) their expectations.
  - 97% said they were either satisfied (31%) or very satisfied (66%) with their visit to Philadelphia.

  Source: GPTMC summer 2008 hotel visitor survey

- **Spend more** money:
  - Visitors who have been to Philadelphia more than once spent 12% more on their visit than first-time visitors, including 34% more on shopping and 17% more on dining.

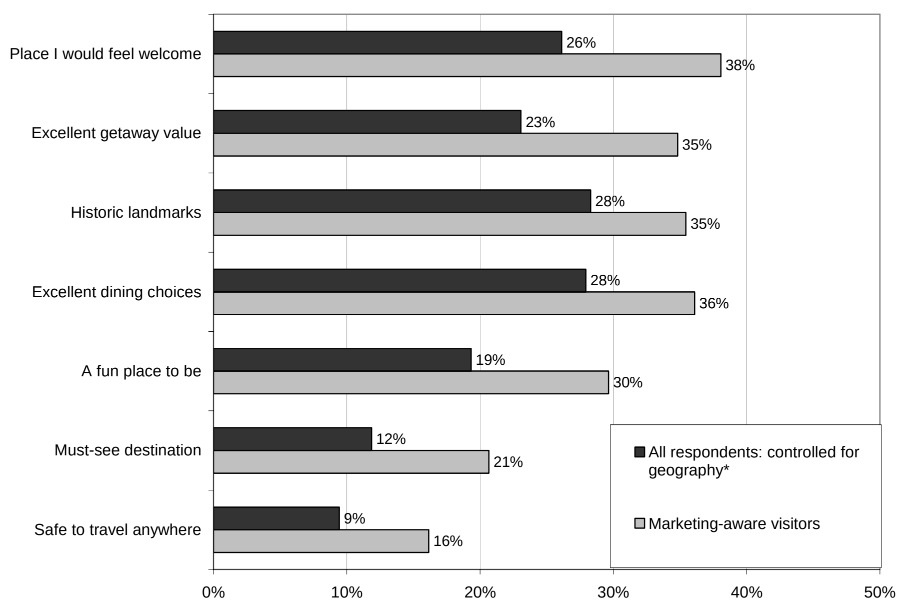
  Source: GPTMC seasonal hotel visitor surveys, 2006-2008

  - Visitors who have seen GPTMC's advertising, read an article placed by GPTMC or visited **gophila.com** spend, on average, 15% more than visitors who are not aware of Philadelphia marketing.

  Source: TNS Travel and Transport Monthly survey for GPTMC, October 2007-September 2008

- Have **improved perceptions** of Philadelphia as a place to visit. The percentage of respondents choosing Philadelphia as the preferred destination among Washington, DC, Boston and Baltimore rises dramatically among those who have been exposed to GPTMC's Web site, ads, press stories or the destination itself:

Marketing Improves Perceptions of Philadelphia



Source: TNS Travel and Transport Monthly survey for GPTMC, October 2007-September 2008

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* The "control group" of all respondents was matched geographically to the group of "marketing-aware" respondents to separate out the effects of marketing from those of geography.

2. **If you don't invite them, they won't come.**
   - Since GPTMC began advertising in 1997, there's been a **63% increase in overnight leisure tourism** to the region, from 6.5 million to 10.6 million visitors in 2007.

     Sources: Tourism Economics, Longwoods International
   - Hotel occupancy was up to **74.1% in 2007 in Philadelphia, the highest since 1949**. The average daily rate was up to $167.56 in 2007, a 37% increase since 1997, when GPTMC began advertising.
     - Nationally, occupancy was 62.9%, and the average daily rate was $103.63 in 2007.

     Source: Smith Travel Research
   - **Saturday is the busiest night of the week** for Center City hotels, with occupancy over 80% for the past three years, showing the strength of the tourist segment.

     Source: Smith Travel Research
   - **New visitor attractions,** such as the National Constitution Center, the Kimmel Center and the Perelman Building at the Philadelphia Museum of Art, are all possible because Philadelphia has a tourism base to sustain them.

3. **Tourism is a replacement industry in Philadelphia.**

Tourism employs our citizens, generates tax revenue and has the capacity for future growth:

   - **88,225 people were employed** in 2007 because of the tourism industry in our region.

     Source: Tourism Economics
   - The region realizes **$25.5 million per day** in economic impact from tourists, or $9.3 billion per year (2007).

     Source: Tourism Economics
   - New restaurants, attractions and visitor amenities are opening every day, providing people with **more reasons to come, residents with more things to enjoy and Philadelphians with more jobs.**

4. **Businesses that benefit from tourism are the backbone of the local economy.**
   - The economic impact of tourism in Philadelphia is so significant because **tourism dollars stay in the region**. Visitors are even more likely than residents to buy products and services from local stores and vendors, bypassing national chains that they can find at home.
   - GPTMC's marketing campaigns **promote neighborhood tourism** and have brought journalists, tourists and more locals to lesser-known neighborhoods such as Port Richmond, Fishtown, Kensington, North Philadelphia, West Philadelphia, South Philadelphia, Queen Village and Bella Vista.
   - GPTMC's **uwishunu**® (You Wish You Knew) campaign has partnered with and promoted local businesses **in all categories of the new Philadelphia creative class:** 10 new media firms, 20 art and design firms, 50 bands and musicians.

5. **Quality of life for residents has improved as tourism has grown.**
   - There is **no "visitors-only" sign** on a new restaurant, attraction or hotel that opens or thrives because of the tourism industry that helps to sustain business.
   - **Philadelphia is now home to blockbuster events** like the King Tut, Salvador Dalí, BodyWorlds and Cezanne exhibitions that have passed through town in recent years. These blockbusters are coming because they do well in a city that can deliver tourists and residents to the ticket booth.

6. **Private investment in Philadelphia has increased as a result of the health of the tourism industry.**
   - The **tourism boom has made Center City more attractive for residents** as well, contributing to the recent residential boom.
     - 10,138 new housing units have been added in Center City since 1997
     - 11,372 children were born to Center City parents between 2000 and 2005

     Source: Center City District
   - Investment in arts and culture—such as the new home for the Philadelphia Theatre Company, the new Perelman Building at the Philadelphia Museum of Art and the expansion of the National Museum of American Jewish History—is all possible because **the Philadelphia market sustains arts and culture through a combination of resident and tourist patronage.**
   - Tourists, in large part, fuel Philadelphia's current dining and bring-your-own-bottle (BYOB) restaurant renaissance. **Spending on dining by tourists represents 24% of all revenue in the food/beverage** category for regional businesses.

     Source: Tourism Economics

7. **The tourism industry is made up of—and supports—other industries.**
   - Hotels, restaurants and attractions are the first that come to mind, but **tourism supports advertising agencies, decorators, lawyers, accountants, computer programmers, farmers** and all whom they employ.
   - GPTMC's marketing campaigns have connected the dots for visitors, through the virtual visitor center of **gophila.com** and **uwishunu.com,** the insider's guide to Philadelphia.
   - GPTMC's **marketing has also supported hundreds of businesses** and tourist attractions throughout the city by:
     - Bringing tourists to those businesses and attractions
     - Providing $4.2 million in grants to many of them over the past few years
     - Publicizing businesses and attractions through visiting journalist programs, podcasts and sponsorships

8. The Philadelphia renaissance is a national story.

Here's a sampling of what is being said:

- "There are enough history excursions in the City of Brotherly Love to fill an entire summer. … But there's also plenty to do off the history track."
  – *The New York Times,* June 1, 2008
- "Spanning just more than 25 blocks from river to river, Philadelphia packs in fantastic dining and bars for every taste." – *Time Out Chicago*, September 11-17, 2008
- "These days, the City of Brotherly Love is a magnet for tourists who come from far and wide to see that history up close." – *NPR*, July 27, 2008

9. Without tourism marketing, the negative threatens to outshine the positive.

- **Negative Philadelphia stories appear frequently enough to** threaten tourism, residential and business development and the public's confidence in the city. Fortunately, those negative stories are not the only ones out there. Coverage of the city as a hot destination is also appearing all the time, **counteracting and counterbalancing the negative** words that people read.

10. Competition is growing among destinations.

Other destinations are advertising more, and visitors are shopping around more:

- **Other cities are increasing their funding** and eating into our market share:
  - NYC & Co is receiving an additional $15 million a year for marketing.
  - Las Vegas spends $85 million on a single seasonal campaign.
  - Orlando has instituted a new hotel tax to provide increased funding for marketing the destination.
- Travelers are spending more time and energy trying to find just the right deal, destination and diversion:
  - "Look-to-book" rates are declining across the Internet as savvy travelers check out all their options before completing a transaction.
  - 23% of travelers in GPTMC's key markets tell us they are hunting for travel bargains more than before due to the economy.

  Source: TNS Monthly Survey for GPTMC

CHAPTER SEVEN
FAST FACTS ABOUT TOURISM IN GREATER PHILADELPHIA

GPTMC's research program produces studies about our visitors and their impact on the region all year long. We use surveys, one-on-one interviews and focus groups to evaluate the effectiveness of our marketing. Here are some top facts that have emerged from these research projects.

Our Visitation

1. Four million more visitors have come to Greater Philadelphia for an overnight leisure trip since 1997, from 6.5 million visitors in '97 to 10.6 million in 2007.

   Sources: Longwoods International, Tourism Economics

2. Overnight leisure visitation has grown more than twice as fast as day leisure visitation to the Greater Philadelphia region from 1997-2007: 32% growth for day trips vs. 63% for overnight trips.

   Sources: Longwoods International, Tourism Economics

Our Marketing

3. Travelers exposed to GPTMC marketing* are 2.5 times more likely to say they intend to visit Philadelphia in the next year than those who haven't seen our marketing.

   Source: TNS Travel and Transport

4. Travelers exposed to GPTMC marketing* spend 15% more on their visit to Philadelphia than visitors who come to Philadelphia without having seen our marketing campaigns.

   Source: TNS Travel and Transport

5. There is a 70% increase in the perception of how safe Philadelphia is among travelers who have seen GPTMC marketing* versus those who have not.

   Source: TNS Travel and Transport

Our Web site, gophila.com

6. GPTMC increased time on **gophila.com** by 30% by redesigning five of our most popular landing pages. The same redesign effort increased use of **gophila.com's** interactive maps by 128% and use of the **gophila.com** hotel booking widget by 24%.

   Source: Google Analytics

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* Respondents were asked if they had seen GPTMC's **Philly's More Fun**® ad campaign, read articles about Philadelphia as a leisure destination or visited **gophila.com**.

7. GPTMC's search engine marketing campaign during the summer of 2008 resulted in 44% of all searches using "Philadelphia Travel" keywords going to **gophila.com**—up from 21% in the spring of 2008.

   Source: Hitwise

8. GPTMC was able to improve **gophila.com's** natural search ranking by using the words that travelers search for most often: "vacation" rather than "trip" or "getaway," "restaurant" and "food" rather than "dining," "hotel" rather than "accommodation."

   Source: Hitwise

Our Visitors

9. Philadelphia has twice the national average of African-American overnight visitors: 11% compared to 5% nationally in 2007.

   Source: Longwoods International

10. Repeat visitors to Philadelphia do less sightseeing but spend more. First-time visitors averaged four attractions per visit, compared to three attractions for repeat visitors. Repeat visitors spent 15% more on their visit than first-time visitors, including 30% more on shopping and 18% more on dining.

    Source: GPTMC Seasonal Hotel Surveys

11. In a recent survey, only 20% of travelers planned to decrease their number of trips this year. Others report cutting back by hunting for travel bargains (23%), taking shorter trips (19%) and vacationing in more economical destinations (17%).

    Source: TNS Monthly Survey for GPTMC

12. Winter attracts visitors from closer to Philadelphia, while summer attracts visitors from farther away. 85% of overnight visitors surveyed in Historic Philadelphia in summer 2008 came from outside the Mid-Atlantic region.

    Sources: GPTMC Historic Philadelphia Intercepts, Longwoods International 2007 Travel Year Survey

APPENDIX I

ONGOING GPTMC RESEARCH STUDIES

For full reports on past and current research studies, visit **gophila.com/research.** Here is a sampling of the studies we conduct and reports we publish:

- **Longwoods TravelsUSA® Survey:** GPTMC uses Longwoods International's syndicated national travel survey to determine visitation to Greater Philadelphia and to build a profile of our visitors.
- **Economic Impact Study:** This comprehensive study evaluates the impact of visitor spending on the Greater Philadelphia economy, including total spending impact, jobs created and taxes generated.
- **Ad Awareness Testing:** GPTMC conducts monthly surveys through an online panel in our key markets to tell us who is seeing our marketing efforts and what effect they are having.
- **Monthly Hospitality Snapshot:** GPTMC, the Greater Philadelphia Hotel Association and the Philadelphia Convention and Visitors Bureau jointly sponsor PKF Consulting's *Snapshot,* which summarizes hotel and attraction data for our region and for competitive destinations.
- **Seasonal Hotel Surveys:** Each season, GPTMC surveys a portion of the more than 10,000 visitors who book their hotel accommodations through **gophila.com** to find out what they did on their trip, how much they spent, whether they intend to return and why.
- **Focus Groups:** Regular meetings with groups of visitors help GPTMC stay in tune with what they love about the region and what enticed them to visit. We also meet with potential visitors in key markets to make sure our advertising is conveying a message that will bring them to the region.
- **Historic Philadelphia Visitor Intercepts:** In both 2007 and 2008, GPTMC interviewed 1,000 summer visitors to Historic Philadelphia to learn about the visitor experience and apply those insights to our ongoing promotion of these core visitor attractions.

APPENDIX II

ABOUT GPTMC

GPTMC is a private, non-profit organization founded and funded by the City of Philadelphia, the Commonwealth of Pennsylvania and The Pew Charitable Trusts. In 1997, GPTMC launched the first consumer campaign to promote to potential tourists the diverse historical, cultural and entertainment/leisure aspects of the five-county region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties).

Our Mission Statement:

The Greater Philadelphia Tourism Marketing Corporation makes Philadelphia and The Countryside® a premier destination through marketing and image building that increases business and promotes the region's vitality.

Our Primary Funders:

- Commonwealth of Pennsylvania
- Pennsylvania Department of Community and Economic Development
- City of Philadelphia tourism promotion tax

For special projects, GPTMC receives support from organizations such as:

- The Pew Charitable Trusts
- William Penn Foundation

Our Tourism Partners:

Marketing the Philadelphia region is a cooperative endeavor, and we couldn't do it without the following civic partnerships:

- African-American Chamber of Commerce
- Brandywine Conference and Visitors Bureau
- Bucks County Conference & Visitors Bureau
- Chester County Conference and Visitors Bureau
- City of Philadelphia
- Greater Philadelphia Cultural Alliance
- Greater Philadelphia Hispanic Chamber of Commerce
- Greater Philadelphia Hotel Association
- Independence Visitor Center Corporation
- National Association of Black Journalists
- National Association of Hispanic Journalists
- Pennsylvania Department of Community and Economic Development
- Pennsylvania Convention Center Authority
- Pennsylvania State Legislature
- Philadelphia Convention & Visitors Bureau
- Philadelphia Multicultural Affairs Congress
- Valley Forge Convention and Visitors Bureau
- And many more!

GPTMC Board of Directors

gophila.com/research

For more information contact, Ethan Conner-Ross, (215) 599-2297 or e-mail ethan@gptmc.com.

PROMOTING PHILADELPHIA AND THE COUNTRYSIDE®

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