

SUMMER 2005: VISITOR SURVEY REPORT



METHODOLOGY

- GPTMC's summer 2005 hotel package was available from June 16, 2005 to Sept. 19, 2005. GPTMC emailed the survey to all summer hotel package consumers who booked their hotel package on gophila.com.
- A total of 1,238 invitations to take the survey were sent out, with 335 completed surveys received, for a response rate of 27%.
- Respondents were offered an incentive of a chance to win one of three \$100 American Express Gift Cheques.
- The error rate for survey findings is +/-5.5% at 95% confidence. Percentages may total more or less than 100% due to rounding. Answers with multiple responses are noted.
- This is the fourth consumer hotel survey GPTMC has conducted. Reports on our Summer '04, Winter '04-05, and Dali hotel package surveys are available at gophila.com/research. This report compares findings from summer '04 to summer '05.

BACKGROUND SUMMER HOTEL DATA

While overall hotel occupancy remained constant in the five-county region this summer (June, July & August), RevPAR (revenue per available room) increased 7.1% in the five-county region and almost 15% in Delaware County due to rises in hotel rates.

The five-county region ADR (average daily rate) rose from \$104 in the summer of 2004 to \$111 this summer.

	Summer 2005 Occupancy (%)	Summer 2004 Occupancy (%)	% Change	Summer 2005 RevPAR (\$)	Summer 2004 RevPAR (\$)	% Change
Philadelphia County	76.96	77.90	-1.2	99.33	93.15	6.6
Bucks County	78.16	76.69	1.9	72.94	67.30	8.4
Chester County	75.28	75.27	0.0	73.95	69.53	6.4
Delaware County	79.56	75.28	5.7	65.87	57.30	14.9
Montgomery County	72.53	72.45	0.1	73.50	68.04	8.0
Five-County Region	76.17	76.11	0.1	84.76	79.18	7.1

PACKAGE CONSUMERS

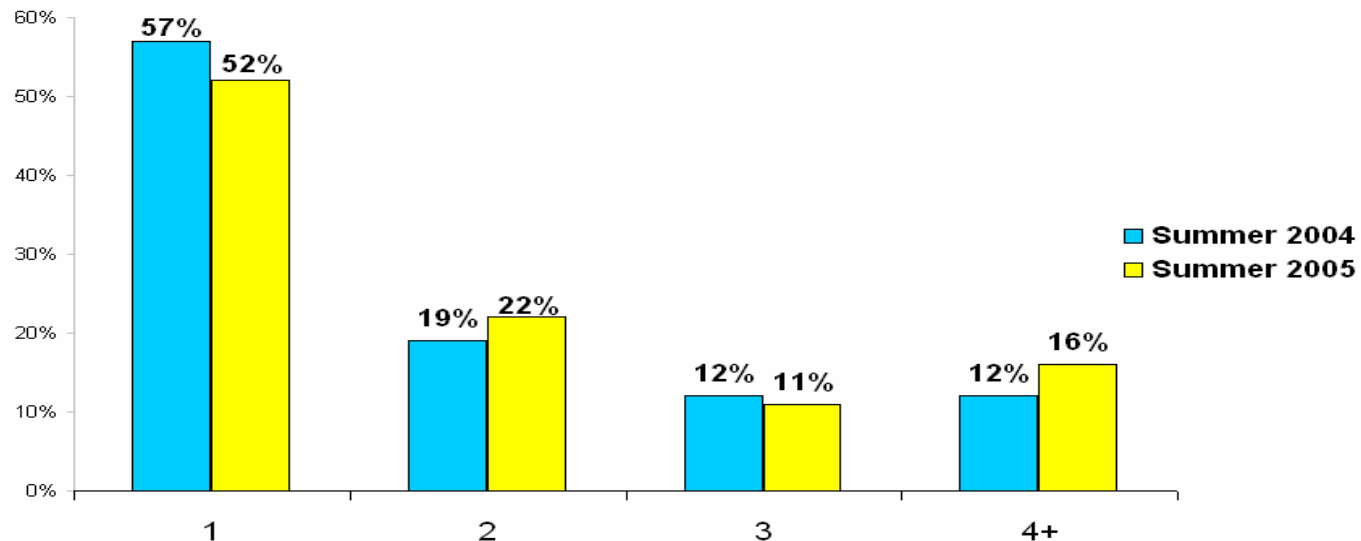
SURVEY RESPONDENTS

- Average Age: 42 years old
- Average 2004 household income: \$94,493
- 65% Married, 25% Single, 10% Living with partner
- 80% Caucasian, 11% African-American, 4 Hispanic, 3% Asian American
- The vast majority of respondents reported staying in a Philadelphia hotel this summer (95%) and 10% reported a stay in Montgomery County hotel. Multiple hotel package stays were possible.
- The average party size for respondents was 2.52 people. Sixty-one percent (61%) of respondents came with only one other person.

PREVIOUS VISITS

Nearly half of respondents (49%) have stayed overnight at a hotel in the Philadelphia region more than one time in the past year.

OVERNIGHT PHILADELPHIA HOTEL STAYS DURING PREVIOUS YEAR

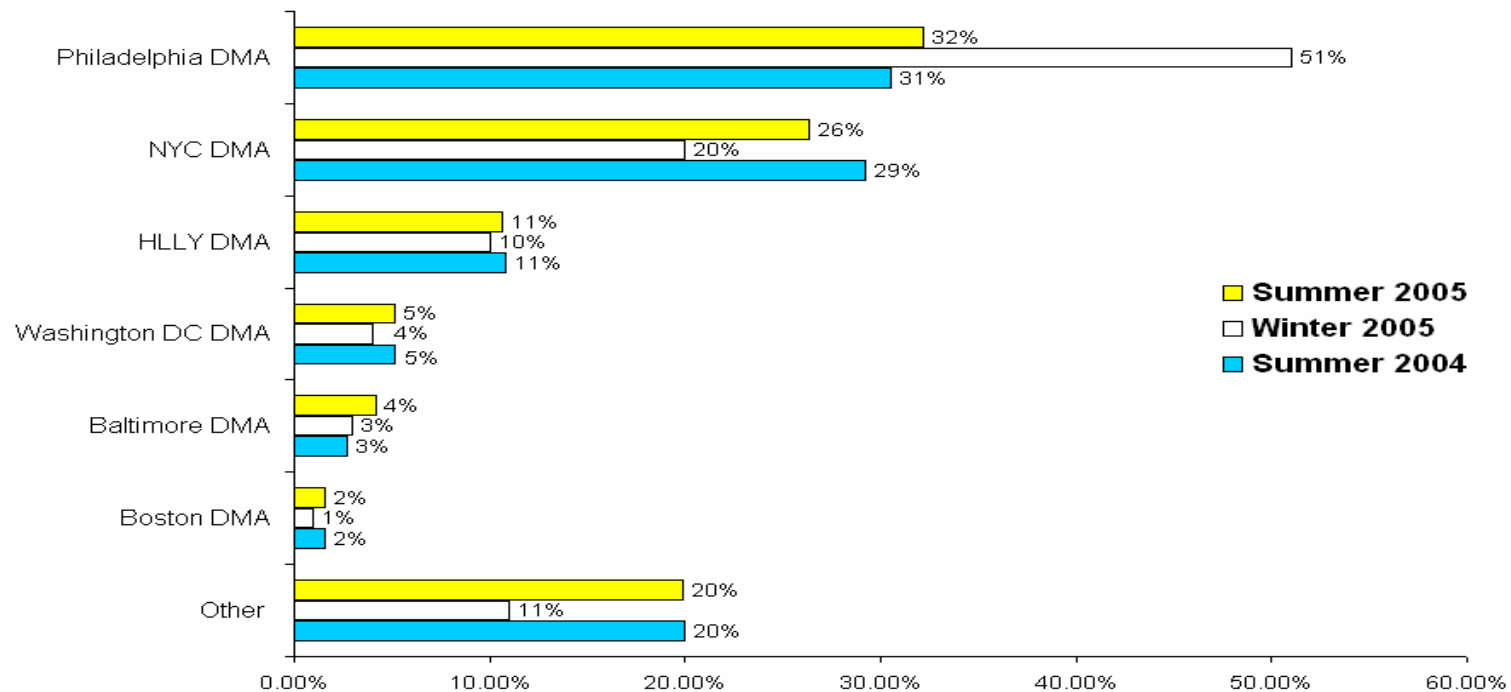


GEOGRAPHIC BREAKOUT

The majority of hotel package consumers came from either the Philadelphia or New York City designated marketing areas (DMA). Moreover, the geographic breakout of consumers in our main markets did not change greatly from last summer.

- During the winter season, the hotel package appears to be much more of a “local product” with half of consumers coming from our local market in the winter (as compared to less than a third in the summer).

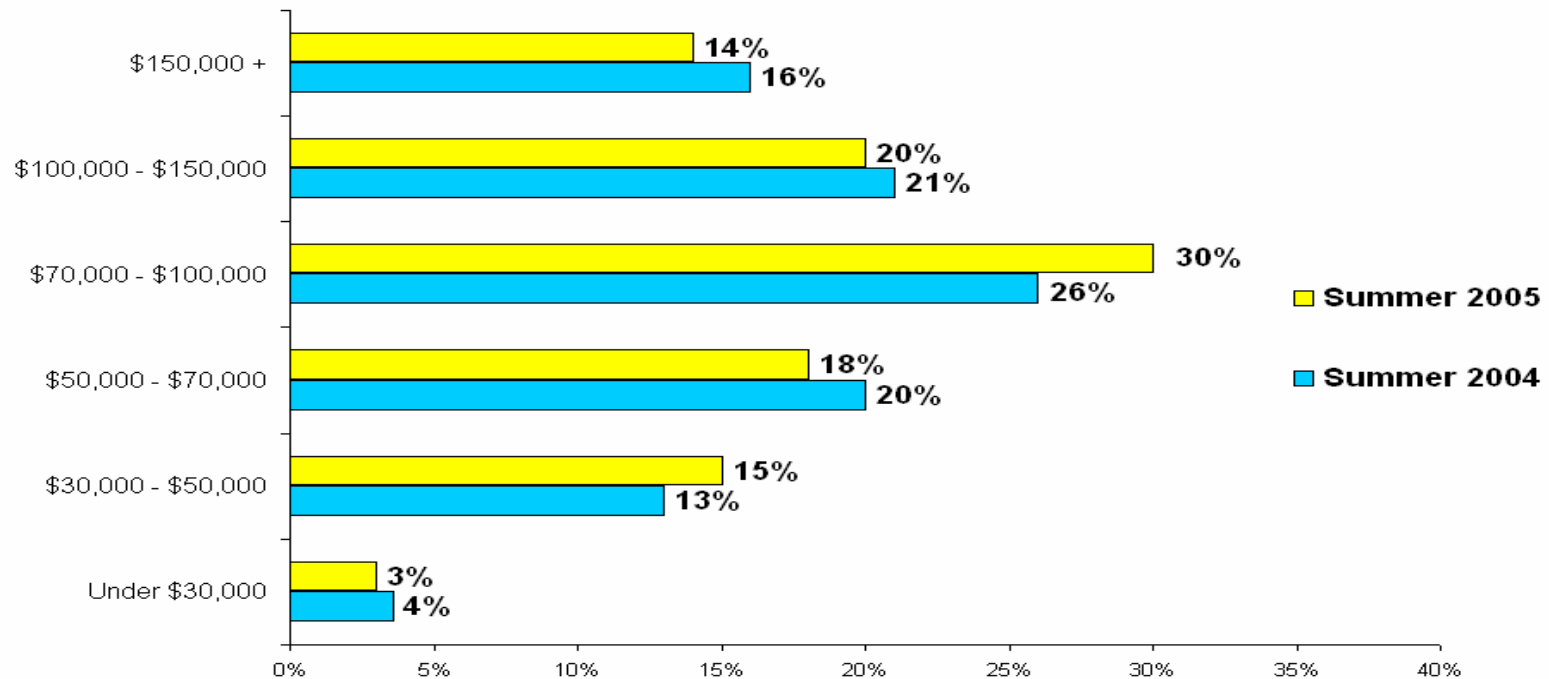
ONLINE PACKAGE CONSUMERS BY DMA



HOUSEHOLD INCOME

Average 2004 household income for summer hotel package visitors was \$94K, slightly higher than the average household income from last summer's visitors (\$90K).

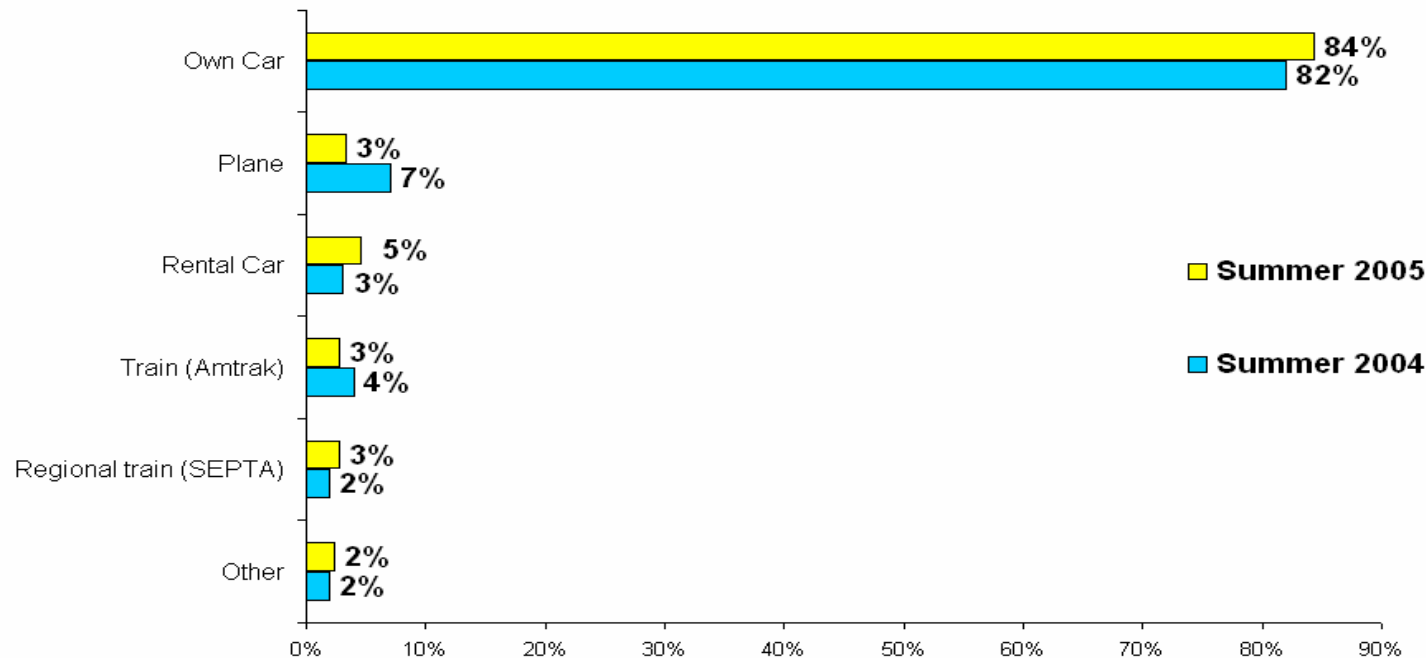
2004 HOUSEHOLD INCOME



MODE OF ARRIVAL

The overwhelming majority of visitors arrived via their own car (84%), confirming the fact that Philadelphia is a drive destination.

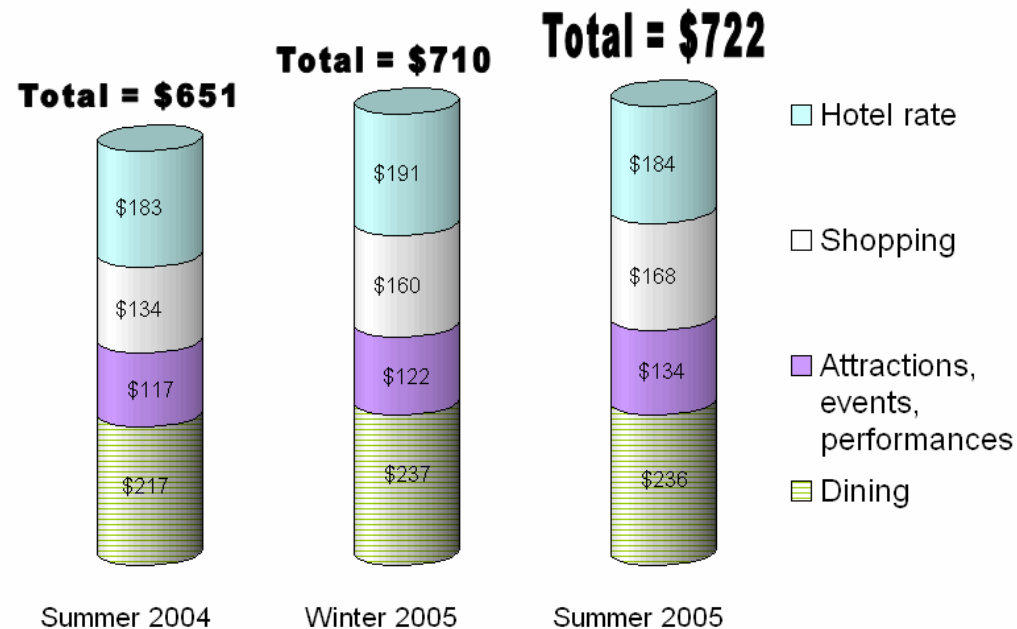
MODE OF ARRIVAL



PACKAGE SPENDING

Average package spending increased 11% from \$641 per package in the summer of 2004 to \$722 this summer. Major spending increases came from shopping (\$134 to \$168) and dining (\$217 to \$236).

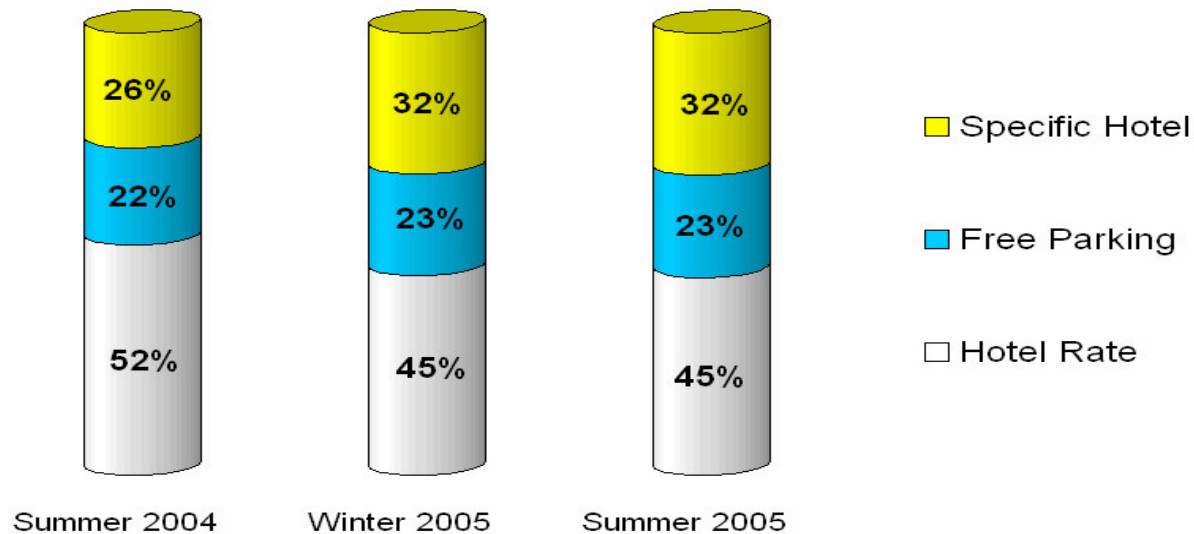
AVERAGE PACKAGE SPENDING



PACKAGE FEATURES

Hotel package consumers consistently find the greatest package asset to be the special hotel rate. However, as the package rate rose from last summer to winter 2005 and summer 2005, slightly fewer consumers identify the rate as the most attractive package feature.

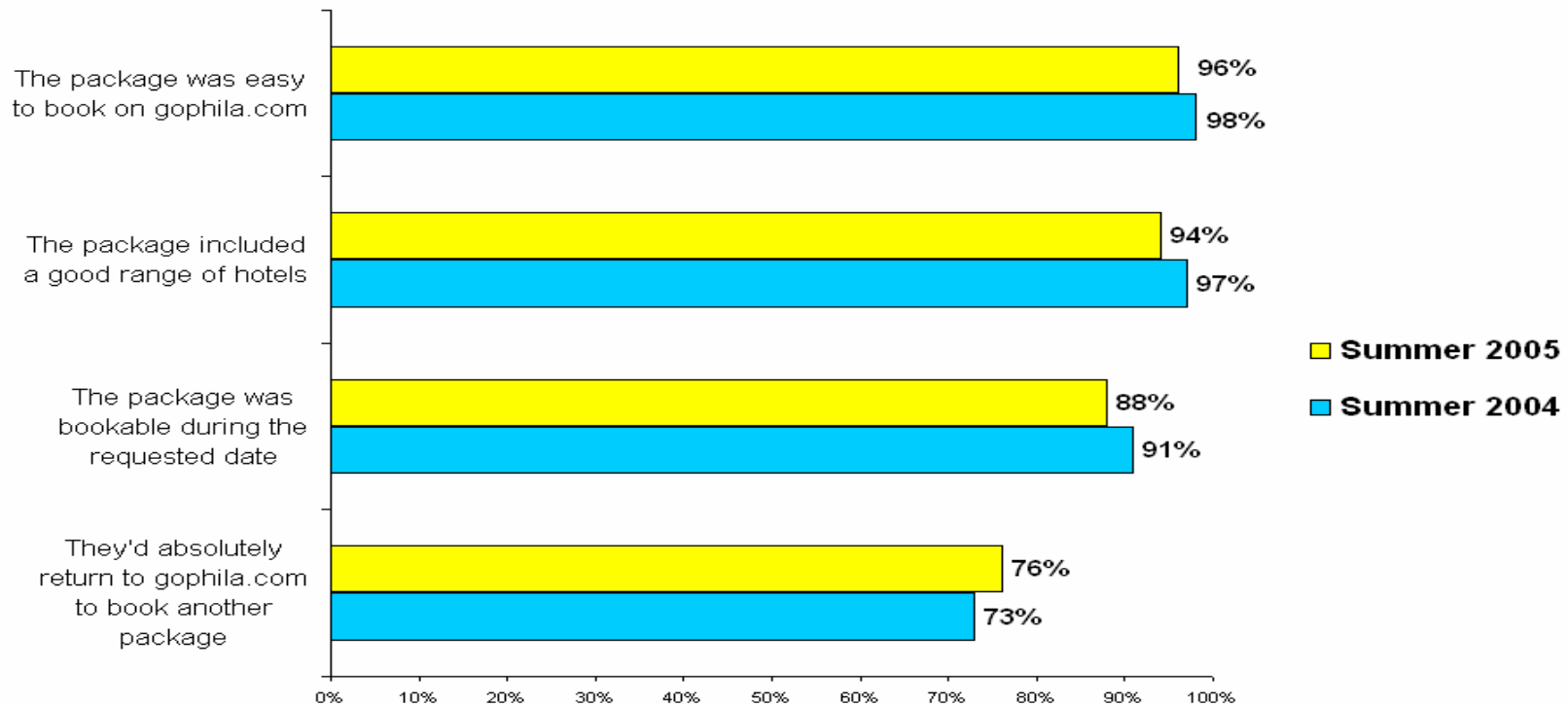
MOST ATTRACTIVE PACKAGE FEATURE



PACKAGE FEEDBACK

Satisfaction with gophila.com as a booking site continues to be extremely high.

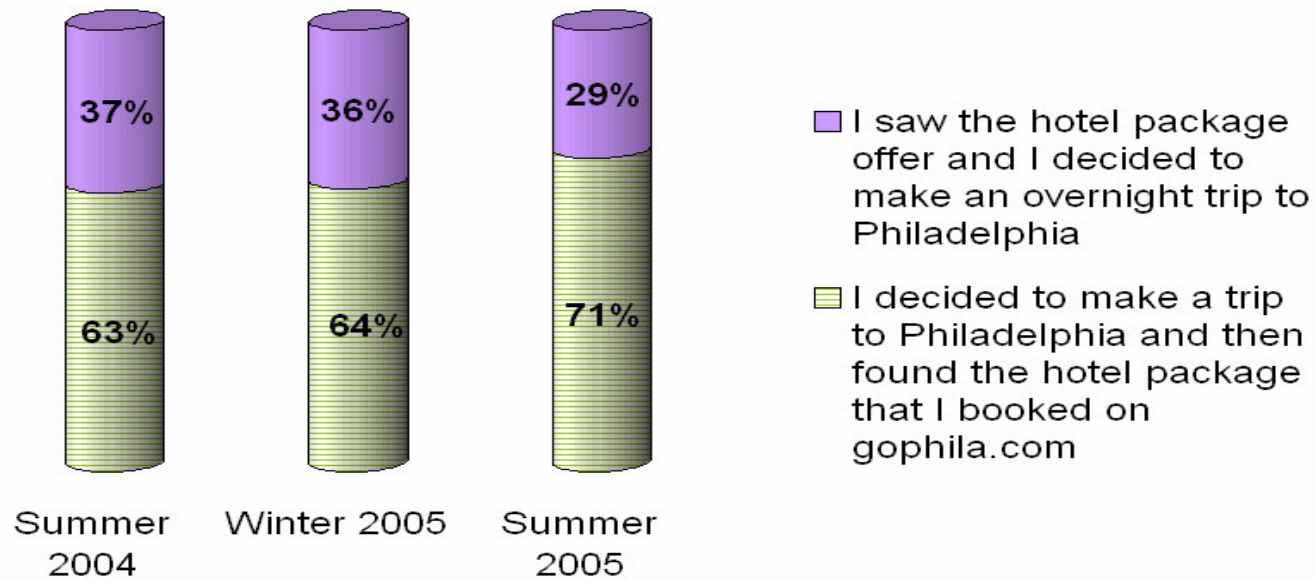
% WHO AGREE THAT . . .



DECISION MAKING

GPTMC's summer '04 advertising began to emphasize the destination, not the hotel package. A year later, we see visitors are increasingly choosing the destination as the reason to visit, as opposed to the package itself.

DECISION MAKING

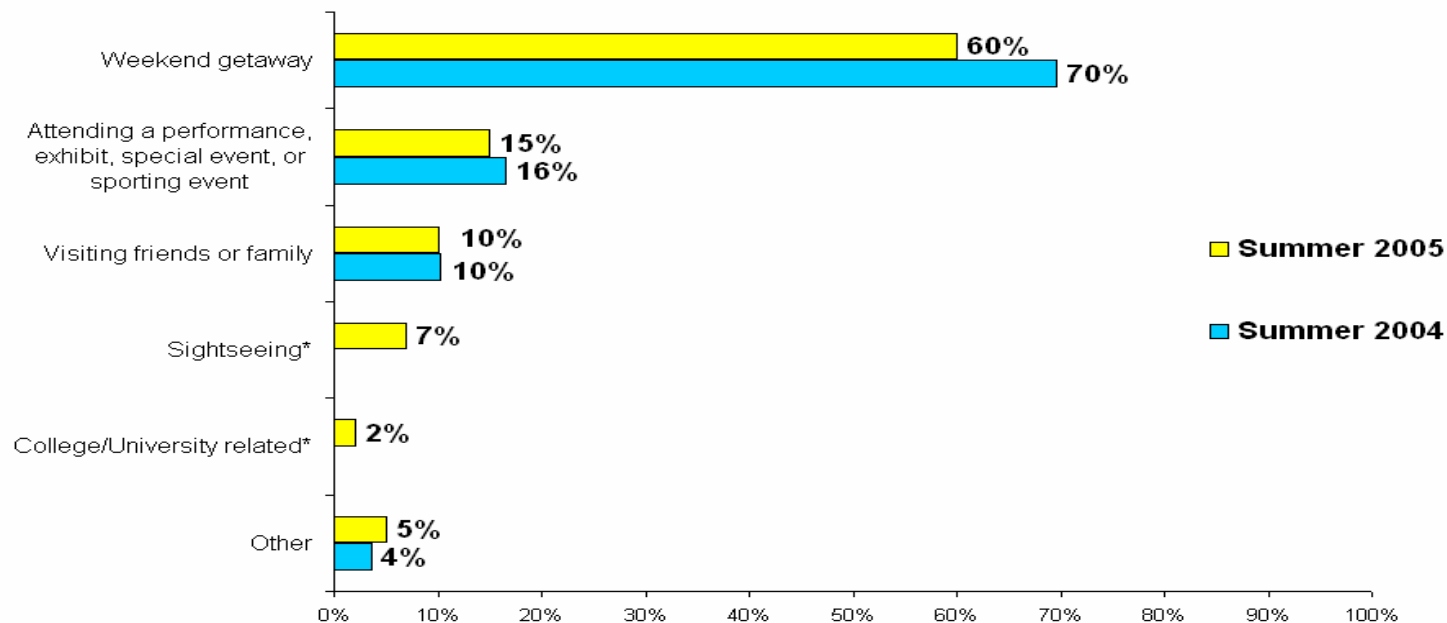


FINDING INFORMATION AND DECIDING TO VISIT

WHY THEY VISIT?

The majority of package visitors came to Philadelphia for a weekend getaway (60%) and 15% came to see a special event. Ten percent (10%) of hotel package visitors came primarily to visit friends and/or family.

PRIMARY PURPOSE OF VISIT



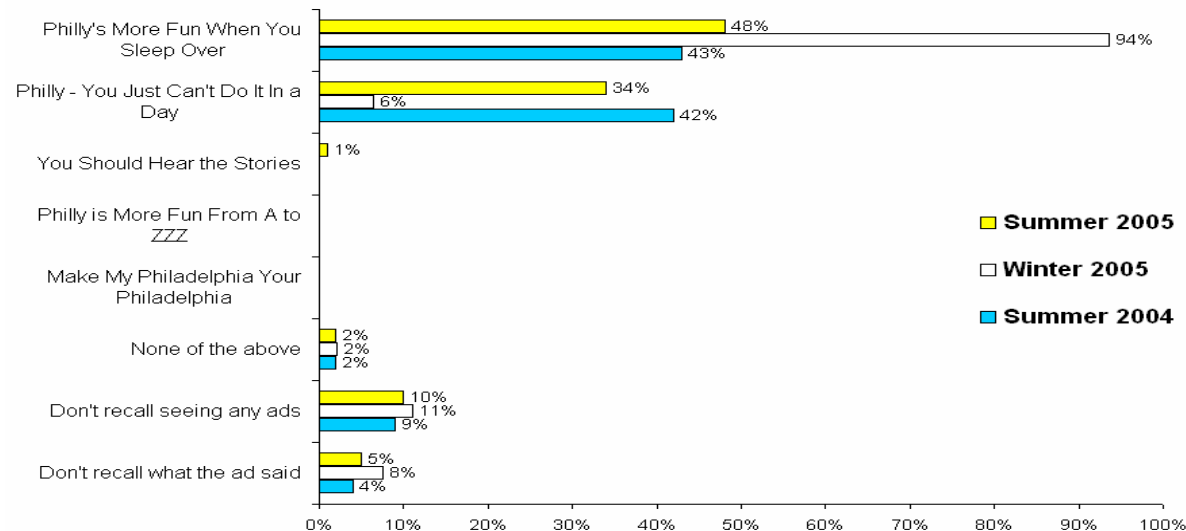
*Not asked in 2004

MESSAGE RECOGNITION

Nearly half (48%) of respondents recognized the *Philly's More Fun When You Sleep Over®* advertising message.

- Thirty-four percent (34%) of respondents still recognized the *Philly – You Just Can't Do It In a Day®* message which was not used at all in this summer's advertising (but was used last summer).

ADVERTISING MESSAGE RECOGNITION



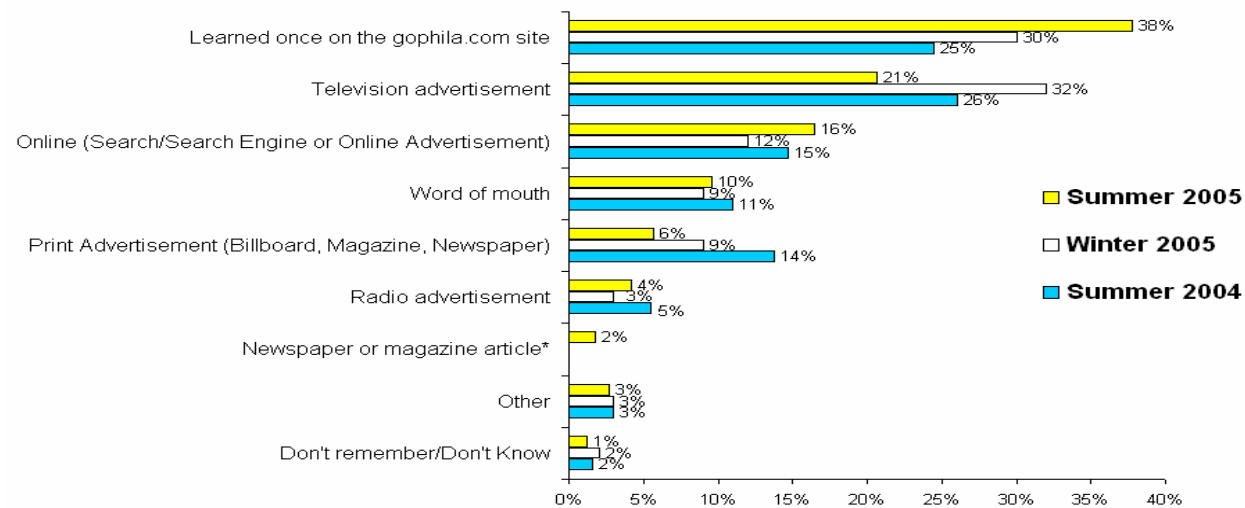
*Multiple answers accepted

HOW DID YOU FIND OUT?

This summer more visitors report learning about the package on gophila.com than by any other means. More than half (54%) report learning about the package online in some way.

- Forty-five percent (45%) of respondents have gophila.com bookmarked in their web browser.

LEARNING ABOUT THE PACKAGE



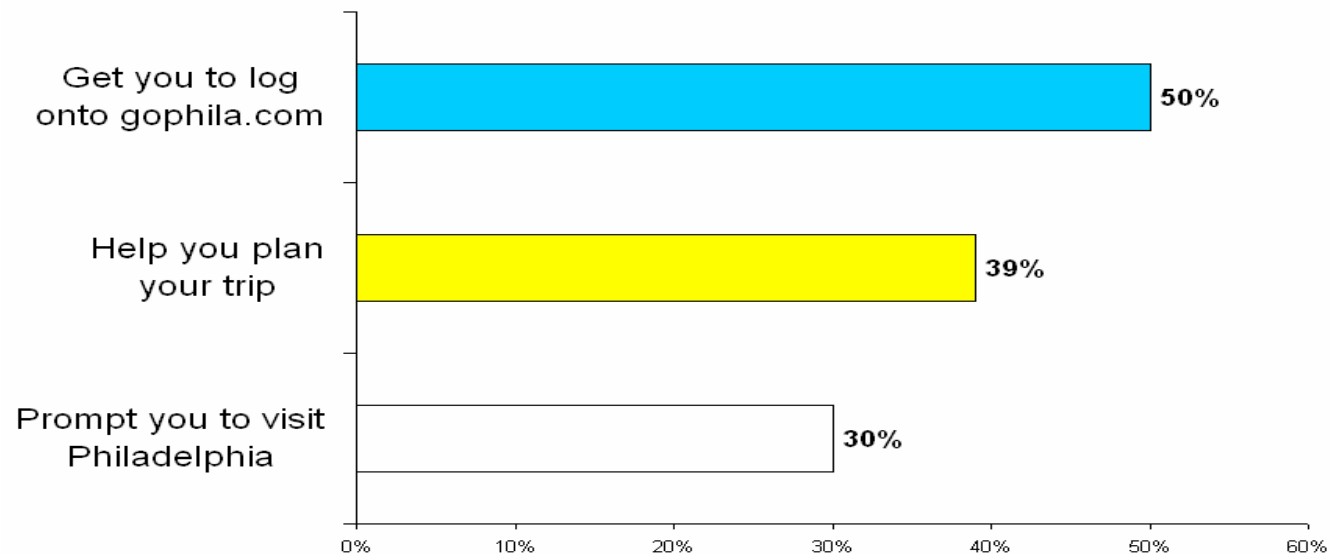
*Not asked in 2004

PRESS ARTICLES

Fifty-percent (50%) of respondents report visiting gophila.com after reading a newspaper or magazine article about Philadelphia.

- AAA publications, *Philly Magazine* and the *Philadelphia Inquirer* were the most cited publications by respondents.

DID A MAGAZINE OR NEWSPAPER ARTICLE ABOUT PHILADELPHIA . . .

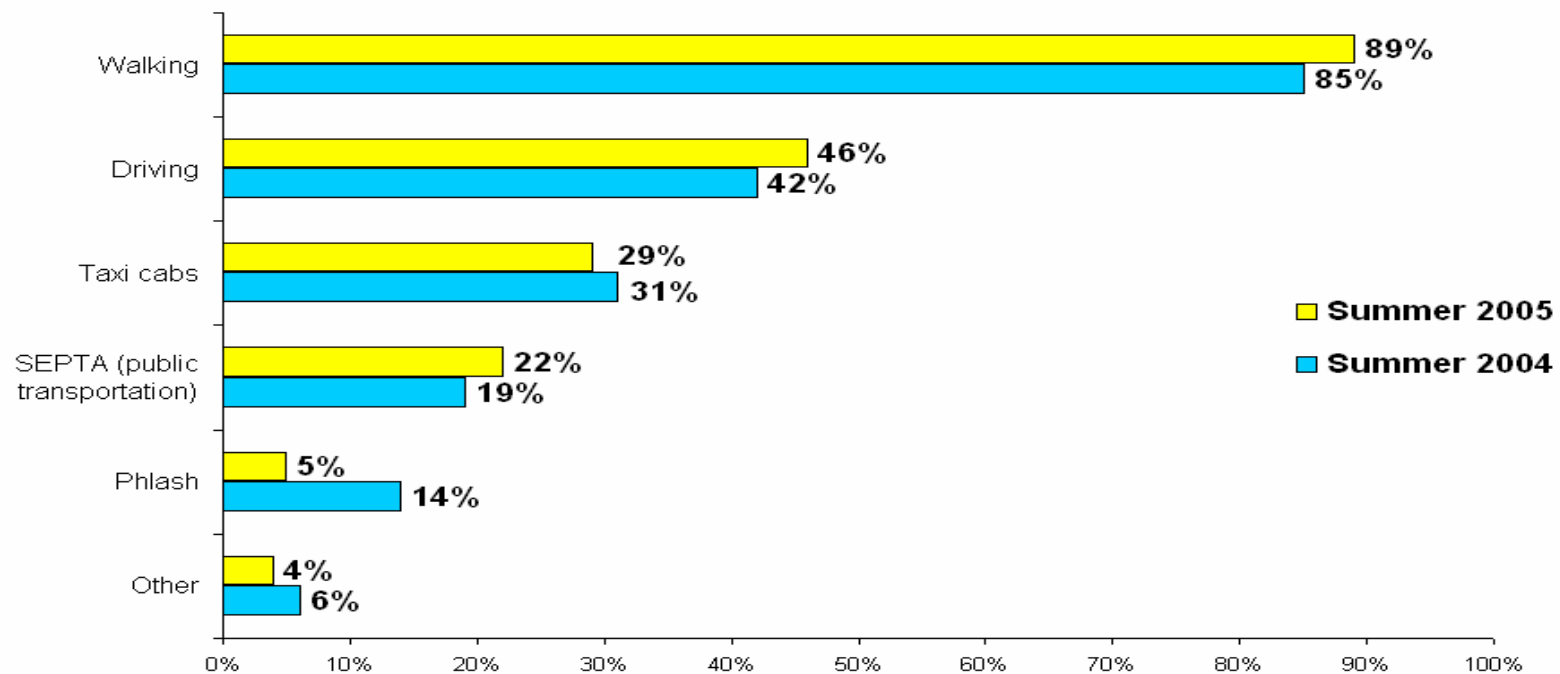


WHAT DID THEY DO?

WALKABLE DESTINATION

The vast majority (89%) of respondents report walking to get around the city, 46% drove, 29% took a taxi, 22% used SEPTA and 5% rode Phlash.

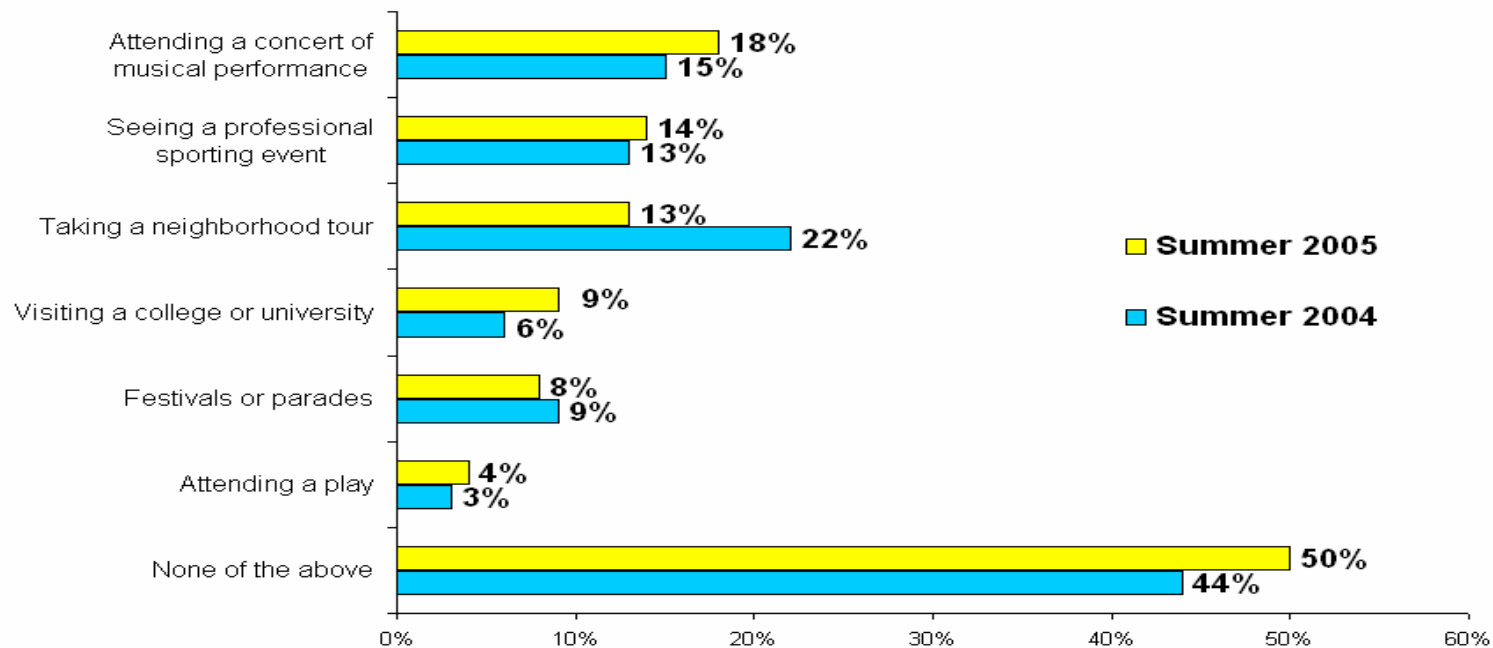
GETTING AROUND WHILE HERE



ACTIVITY PARTICIPATION

The percentage of respondents who attended a concert or musical performance increased slightly from 15% to 18% this summer. Visits to area colleges and universities also increased from 6% to 9% this summer.

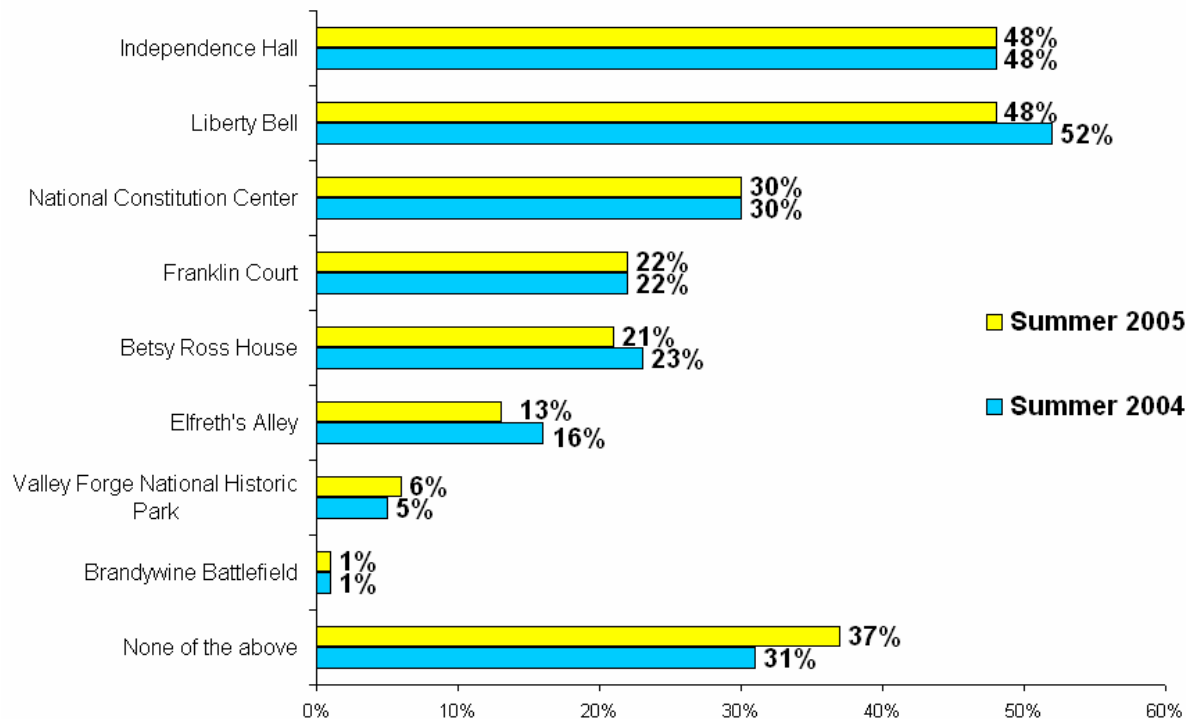
ACTIVITY PARTICIPATION



HISTORICAL SITES

Visitation to historic sites in and around Independence National Historic Park remained consistent from last summer and remained a top attraction for hotel package consumers.

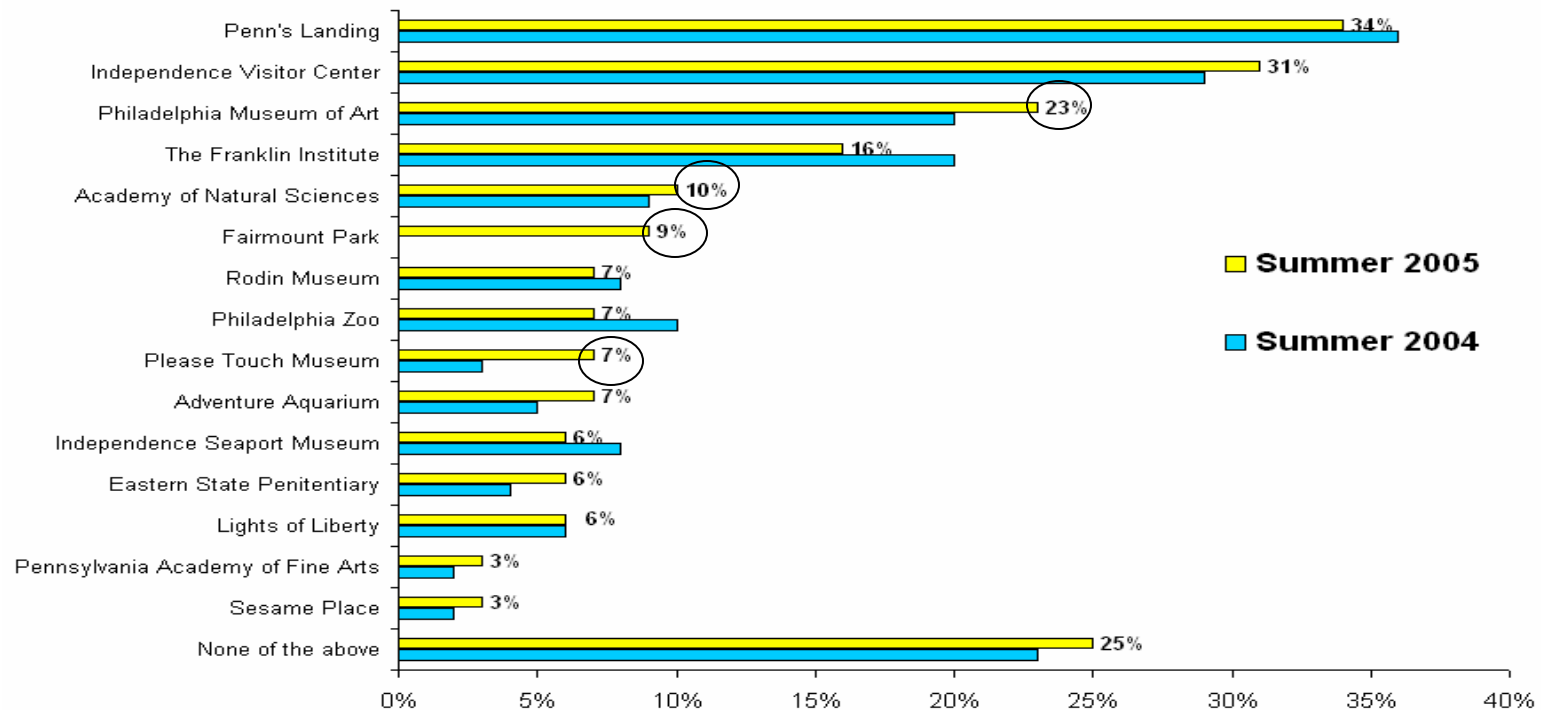
HISTORICAL SITES VISITED



ATTRACTIONS

Attractions around the Benjamin Franklin Parkway saw increases in visitation this summer from package consumers. Penn's Landing and the Independence Visitor Center remained top spots to visit this summer.

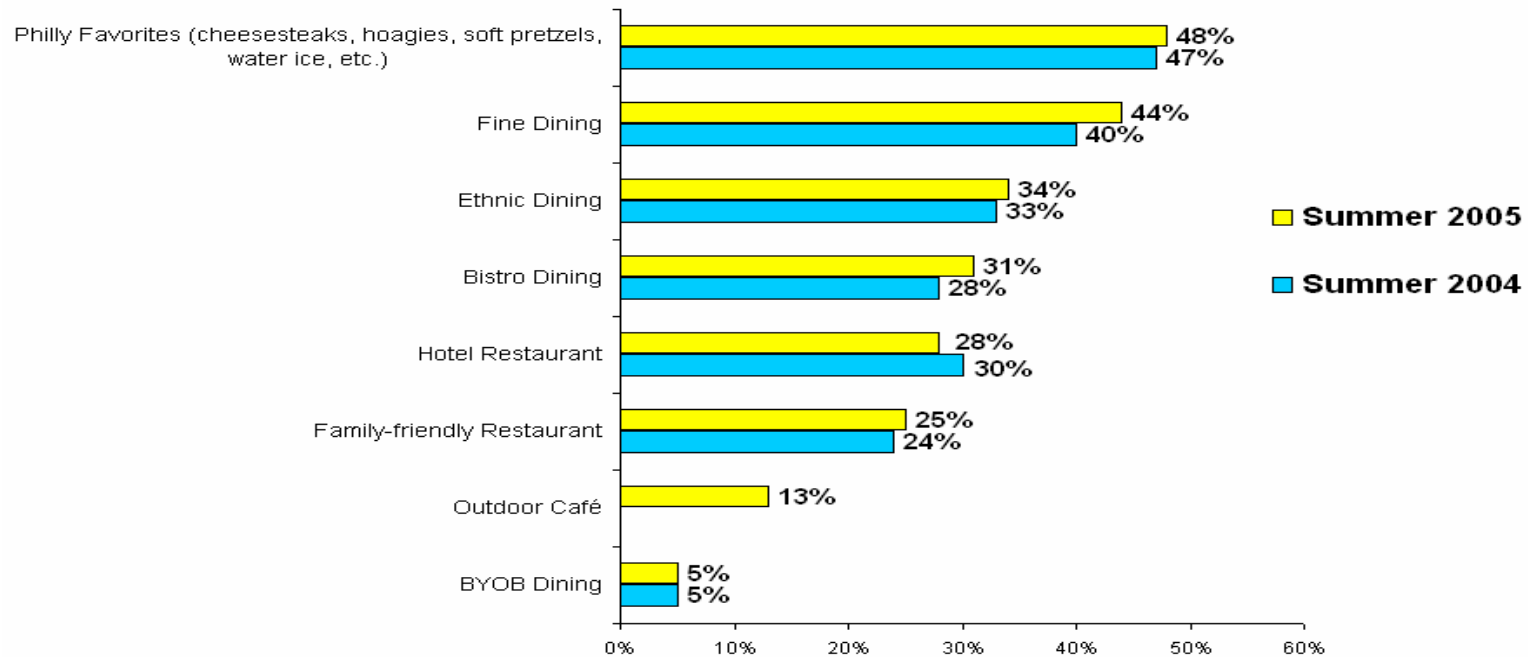
ATTRACTIONS VISITED



FOOD FOR THOUGHT

While visitors continue to enjoy some of the older Philadelphia favorites (cheesesteaks, hoagies, etc.) they are increasingly savoring our fine dining establishments.

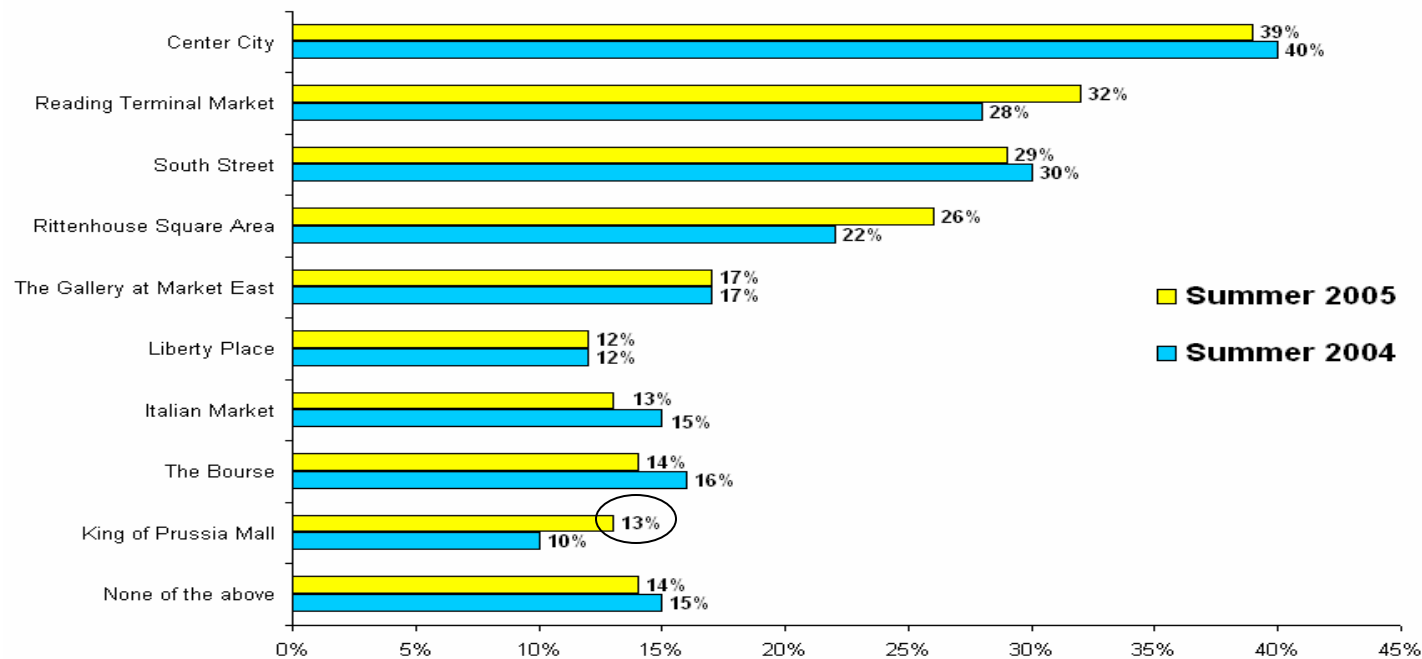
DINING EXPERIENCES



SHOP, DON'T STOP

More consumers reported visiting the Reading Terminal Market and shopping in the Rittenhouse Square area this summer. Visitation to the King of Prussia Mall by visitors also increased this summer to 13%.

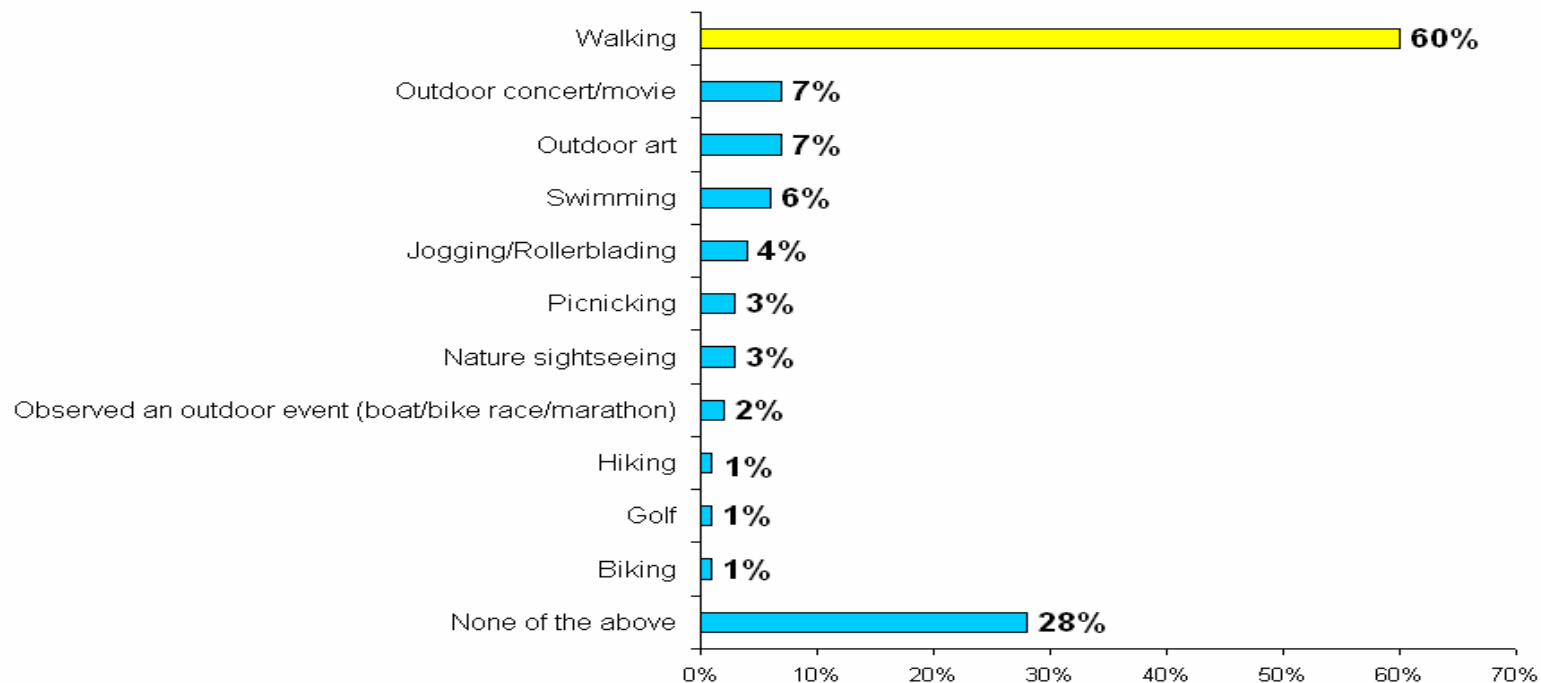
SHOPPING AREAS VISITED



OUTDOOR ACTIVITIES

For the first time, GPTMC asked visitors about their outdoor activities
Walking is by far the most popular activity. (from a closed list)

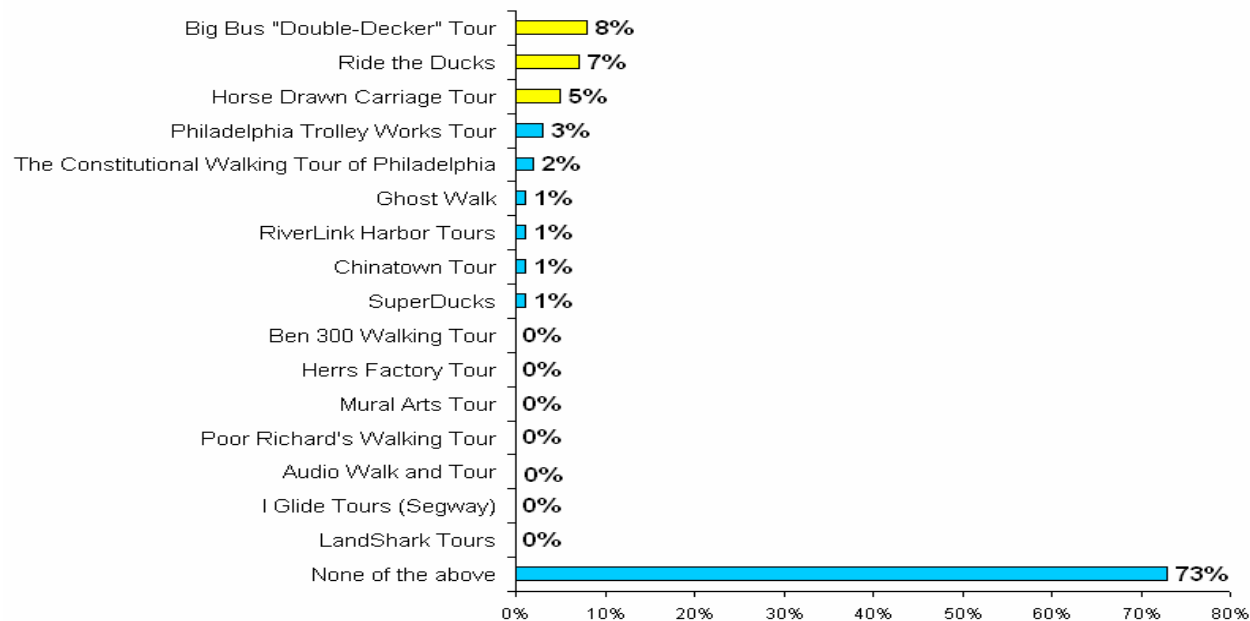
OUTDOOR ACTIVITIES



GUIDED TOURS

The majority of respondents did not participate in a guided tour of Philadelphia. This supports findings from GPTMC's summer focus group where visitors described wandering on their own. Among the tours most cited were The Big Bus, Ride the Ducks, and Horse Drawn Carriage Tour.

GUIDED TOURS

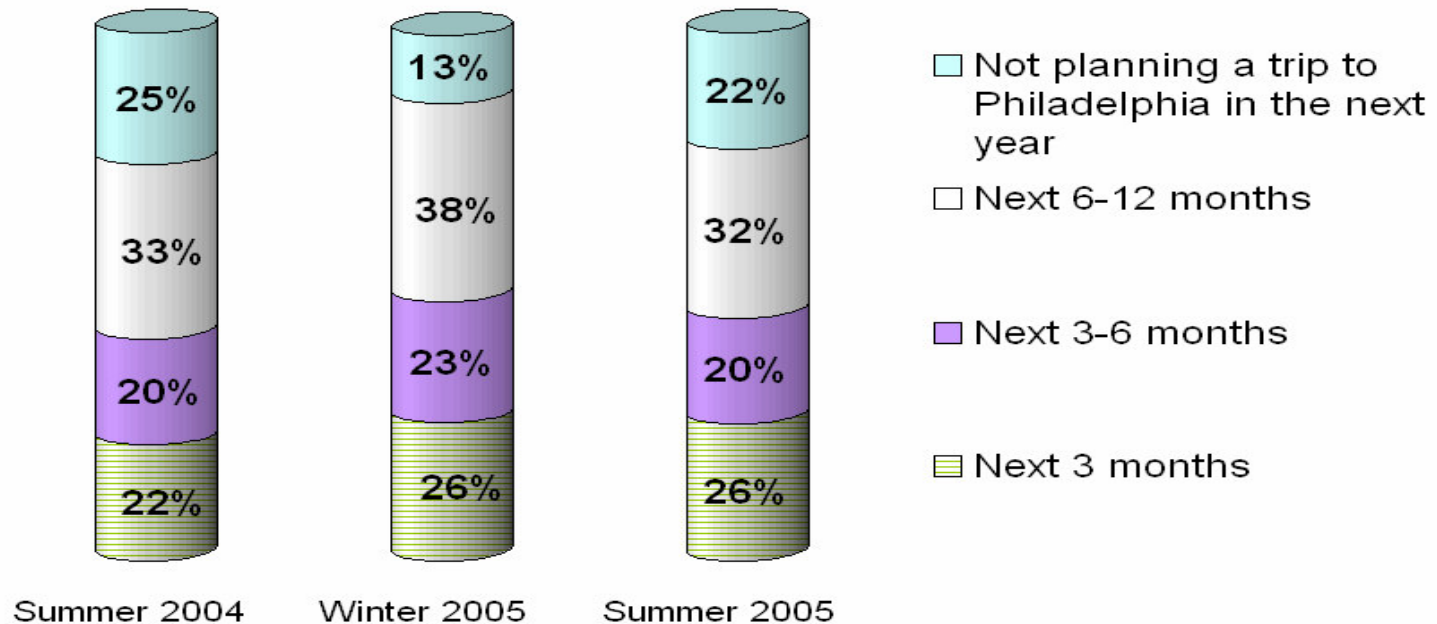


NEXT VISIT

WHEN WILL I SEE YOU AGAIN?

Overall, 78% of respondents plan on returning to Philadelphia within the next year, with more than a quarter (26%) planning to return in the next three months.

RETURN VISITATION PLANNING



NEXT VISIT PREFERENCE

More than three quarters (77%) of consumers would prefer staying on a two-night package with parking during their next visit. Respondents from this summer were more inclined than respondents from the winter to prefer a one-night package with parking (14% to 10%), just in time for the Ben package.

OVERNIGHT STAY PREFERENCE FOR NEXT VISIT

