

Summer 2006 Hotel Visitors

Report on Survey Findings

October 2006

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BACKGROUND



- Between June 23 and September 16, 2006 visitors made 2,888 reservations on gophila.com, totaling 5,803 room nights. Hotel revenue came to \$781,965, at an average of \$134.75 per room night.
- During this time, 2,233 reservations for 4,701 room nights were made for the Summer Overnight package, accounting for 81% of total gophila.com sales. (A final count of total hotel packages sold for summer 2006 is forthcoming.)
- The average Philly Overnight package price (based on TravelHero data) was \$272.61, an increase of 7.4% from summer 2005. Hotel spending as self-reported by respondents is higher.
- The Andrew Wyeth, Philadelphia Freedom hotel packages and individual room nights were available during this time.

METHODOLOGY



- GPTMC emailed an invitation to take the survey to all hotel visitors who booked on Gophila.com between June 23 and September 16, 2006.
- A total of 2,292 invitations were sent out, with 582 completed surveys received, for a response rate of 25%.
- As incentive, respondents had a chance to win a \$300 American Express Gift Cheque.
- The error rate for survey findings is +/- 4.1% at 95% confidence. Percentages may total more or less than 100% due to rounding.
- Questions as they appeared in the survey are listed at the bottom of each slide. Respondents were asked to choose only one option unless otherwise noted.
- This is the 6th consumer hotel survey GPTMC has conducted. Reports on our summer '04, winter '05, summer '05, winter '06 and Dali hotel package surveys are available at gophila.com/research. This report compares findings from summer '05 to summer '06 unless labeled otherwise. Responses not available in 2005 are noted.

DEMOGRAPHICS



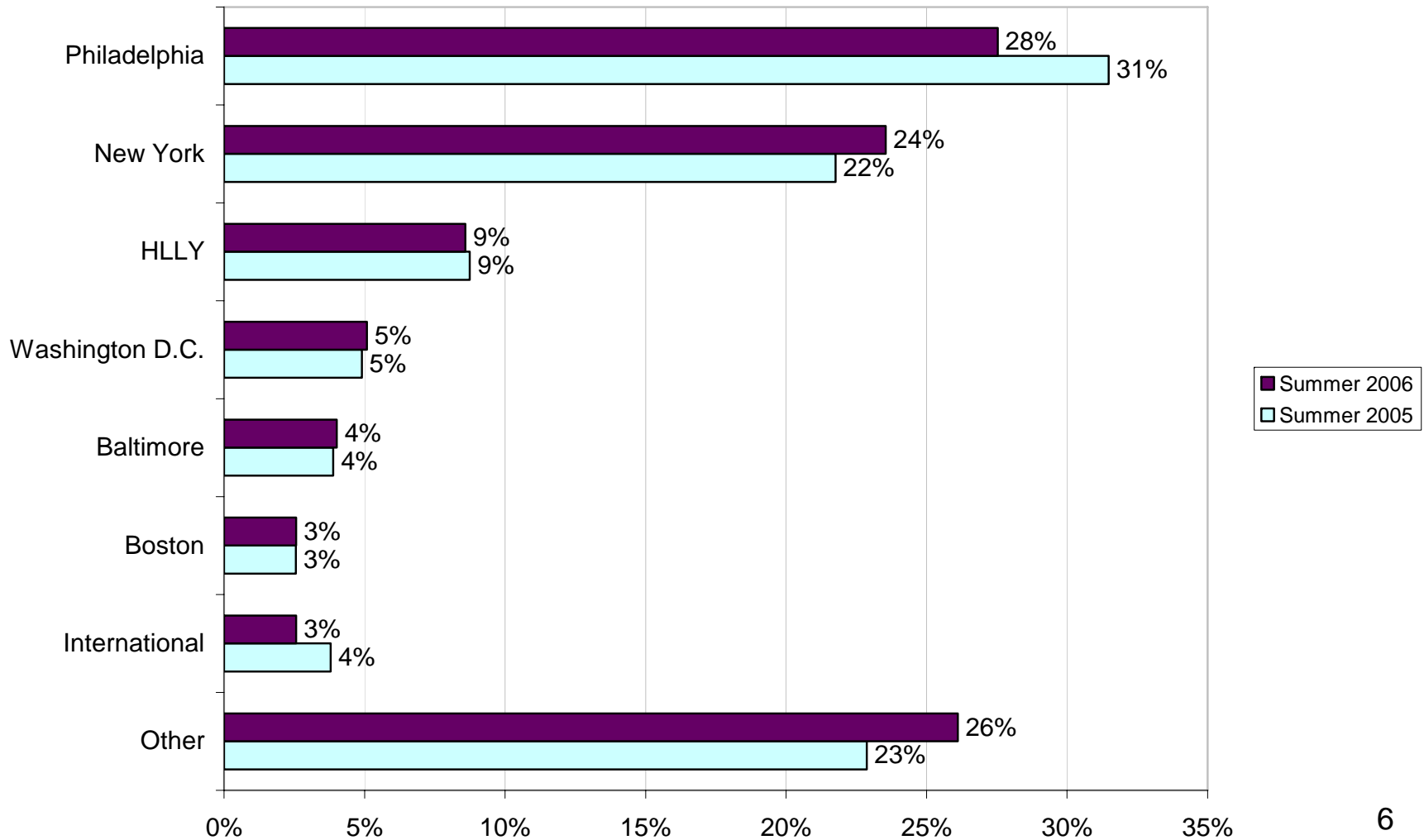
	Summer 2006	Summer 2005
Age	44.6 years old	42.7 years old
Marital Status	69.3 % married	64.6% married
Gender	60.6% female	
Household Income	\$102,625	\$94,493
Race/Ethnicity		
White/Caucasian	85%	80%
Black/African-American	8%	11%
Asian/Pacific Islander	3%	4%
Hispanic/Latino	2%	4%

HOTEL STAY

	Summer 2006	Summer 2005
Number of stays at a Philadelphia hotel in the past year	1.59	1.90
Number of stays booked on gophila.com in the past year	1.25	1.45
Location of hotel stay	90% downtown	95% downtown
Length of hotel stay	2.01 nights	1.82 nights
Number of rooms booked	1.08 rooms	1.09 rooms

GEOGRAPHY

Origin DMA for all Gophila.com Bookings

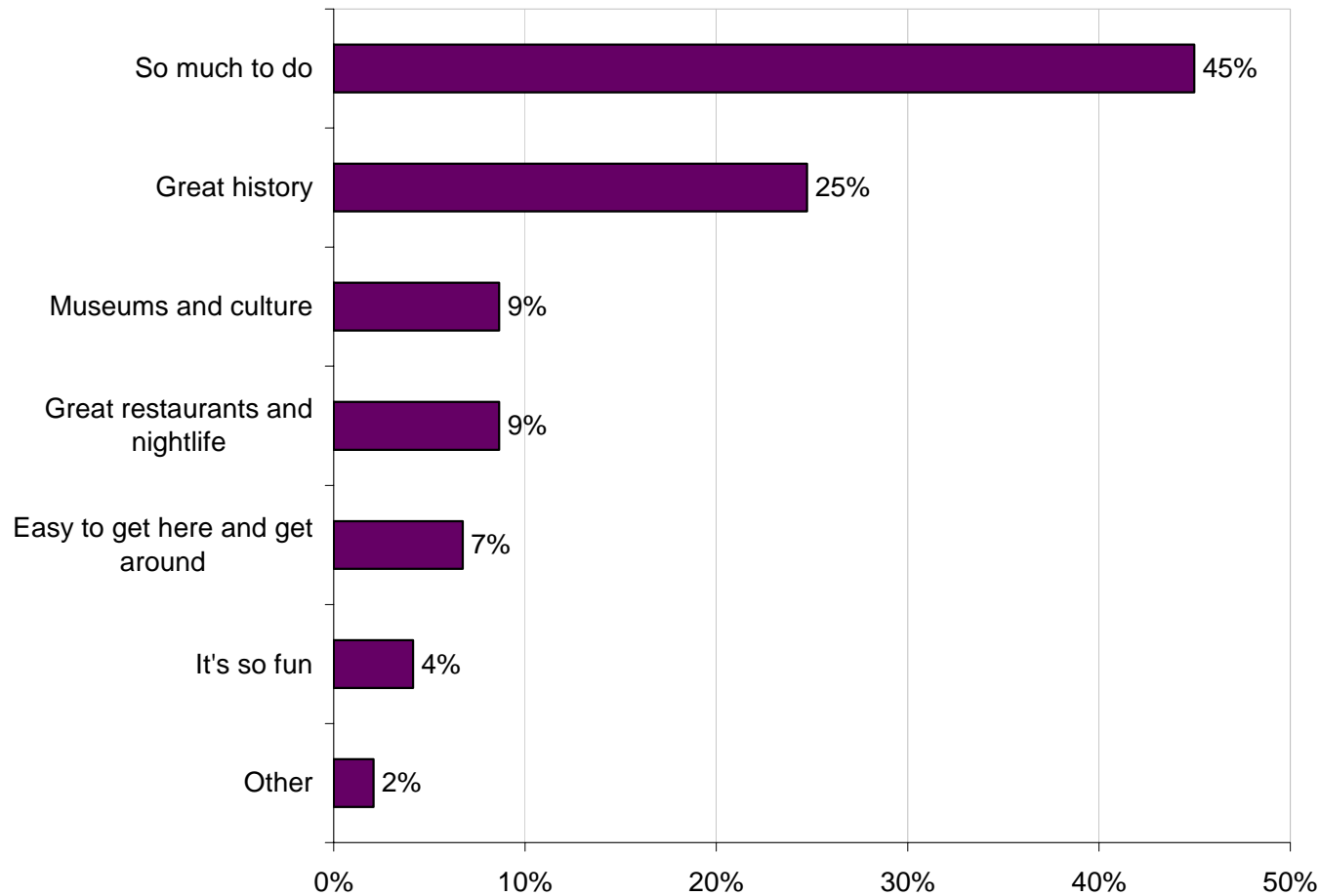


Section II: Coming to Philadelphia

“So much to do” was the top reason offered to visit Philadelphia, surpassing “great history” which was the top choice in winter 2005-06, the first time the questions was asked.



Reason to Visit

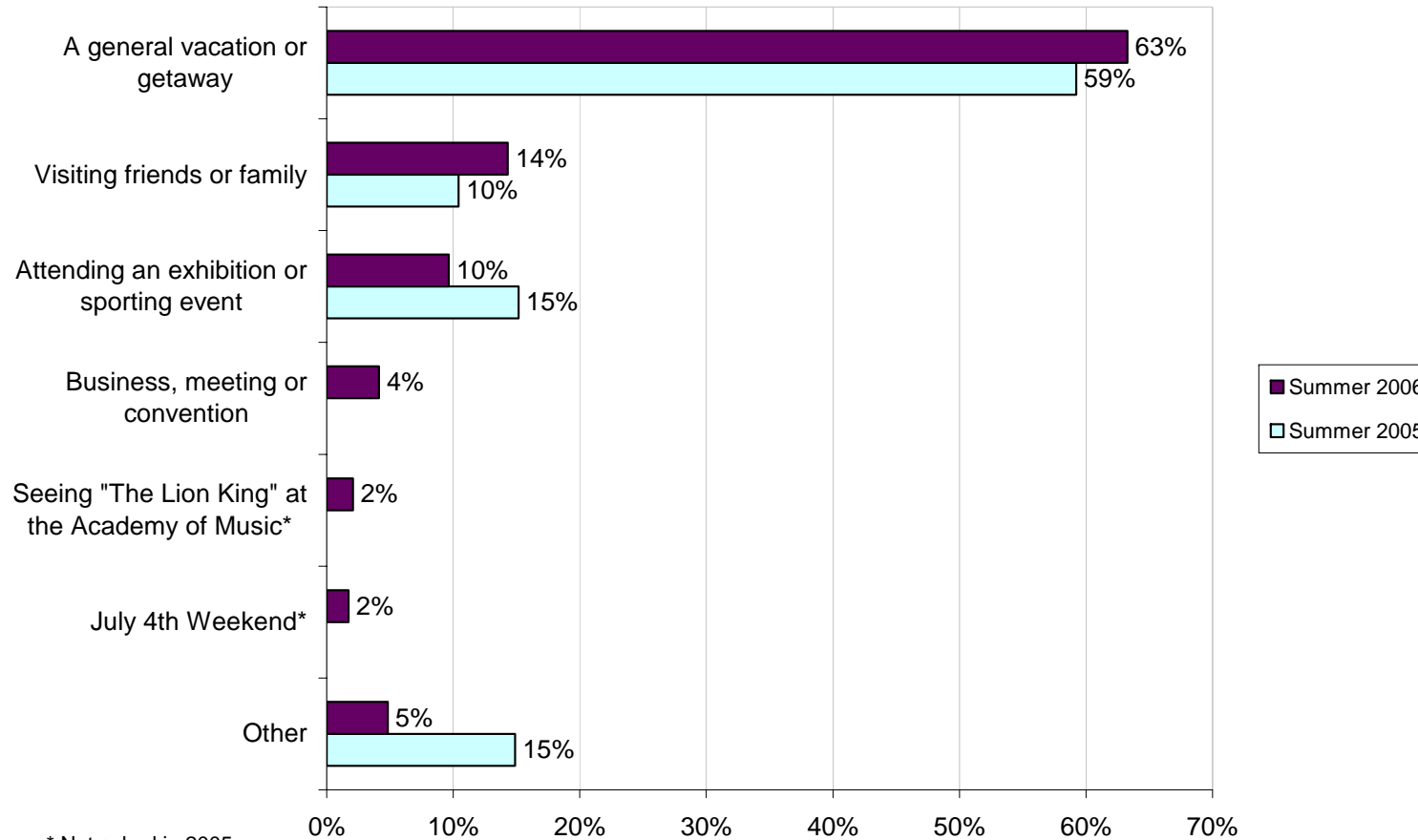


Q5. If you could offer people you meet one reason they should visit Philadelphia and the Countryside, what would that reason be?

General vacations/getaways remained easily the top reason to come to Philadelphia, with visiting friends/family and attending an exhibition or sporting event coming in a distant second and third.



Purpose of Stay

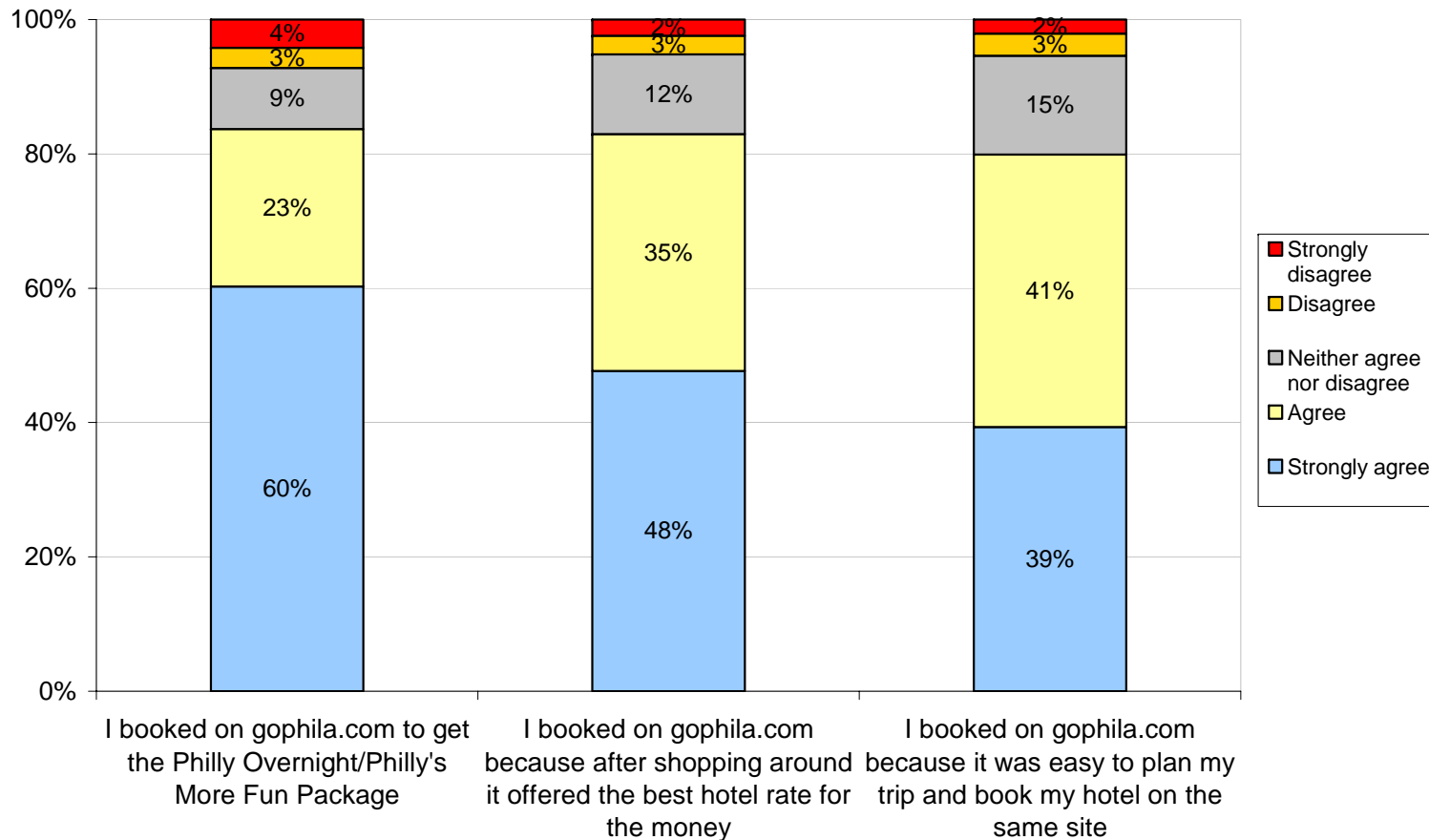


Q14. What was the primary purpose of your stay in Philadelphia?

The Philly Overnight package proved tremendously popular, with 60% strongly agreeing that they booked on gophila.com to get the package. The price and ease of gophila.com also scored well.



Reasons to Book on Gophila.com

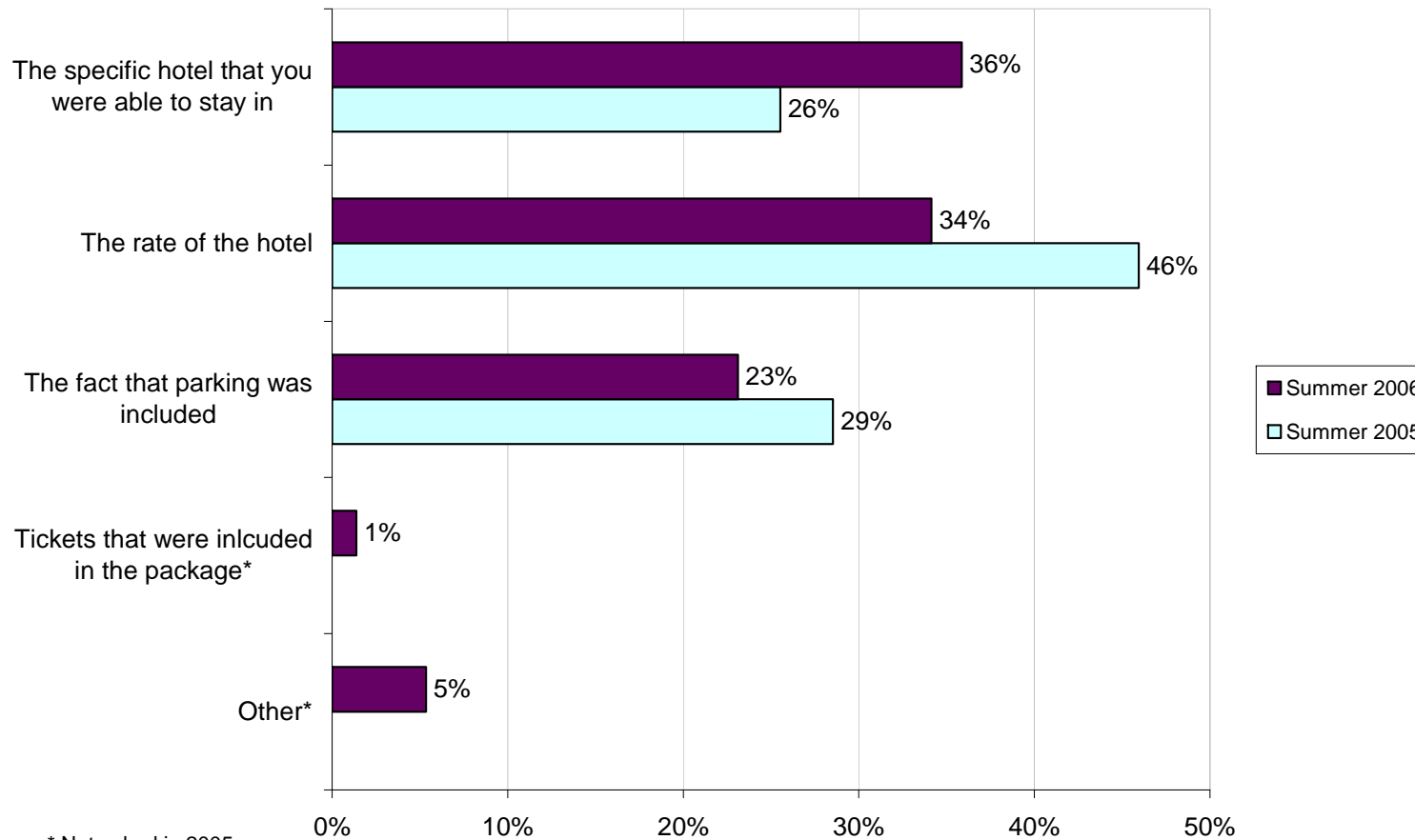


Q24. Using a scale of one to five where one is strongly disagree and five is agree:

Specific hotels surpassed hotel rate as the most attractive feature of hotel bookings on gophila.com, with many consumers citing location. Both factors, along with free parking, appear to work in concert to attract bookings.



Attractiveness of Hotel Offer

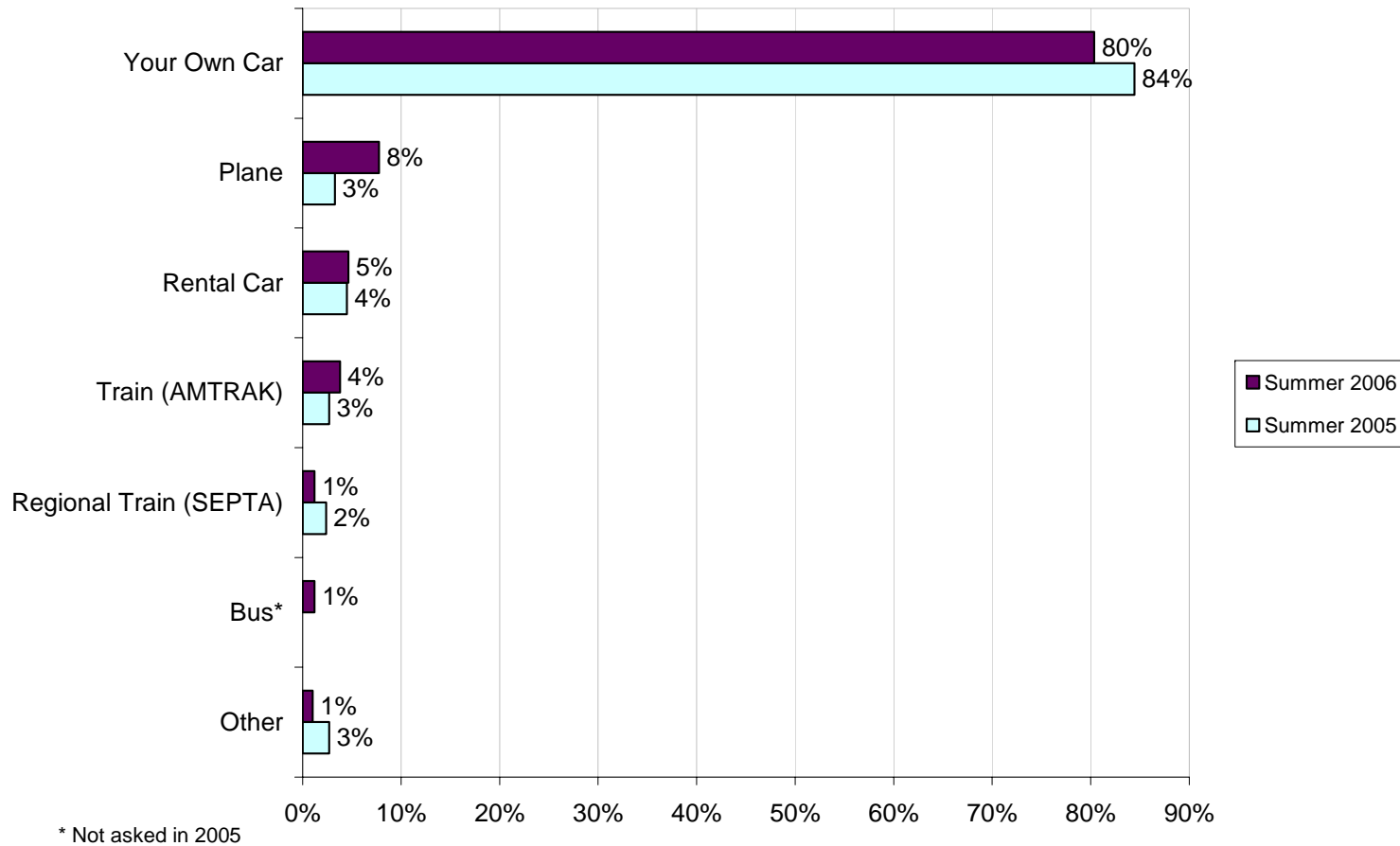


Q15. We'd like to learn what attracted you to the hotel offer you booked through gophila.com. Please choose the feature that was most attractive to you:

Travelers again overwhelmingly arrived by car in summer 2006. There was, however, a significant increase in arrivals by plane in 2006, up to 8% from 3% in summer 2005.



Travel to Philadelphia

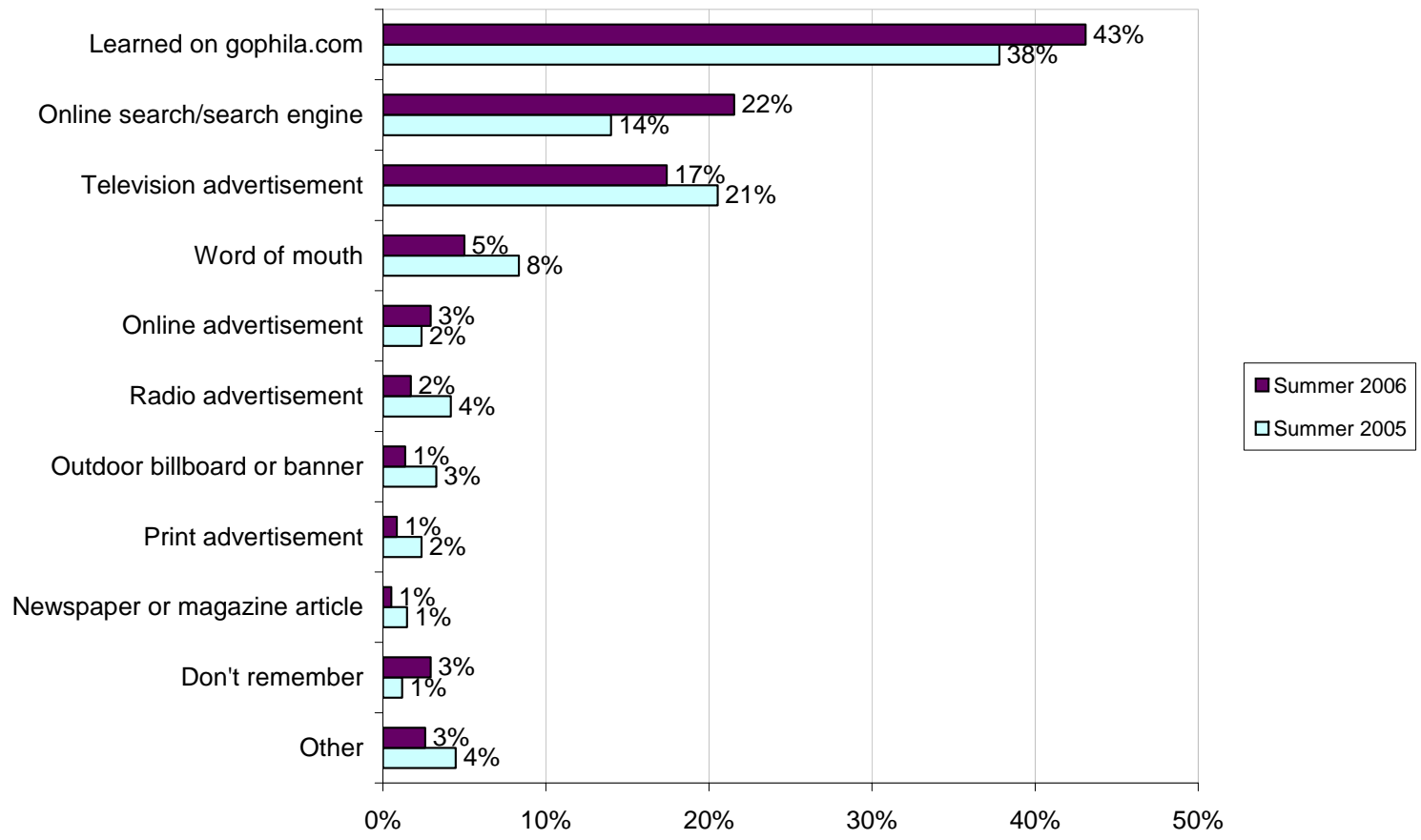


Q10. How did you travel to Philadelphia?

The Internet is the primary medium for learning about accommodations available on gophila.com, with 68% of visitors either learning from an online source.



Learning about Gophila.com Accomodations

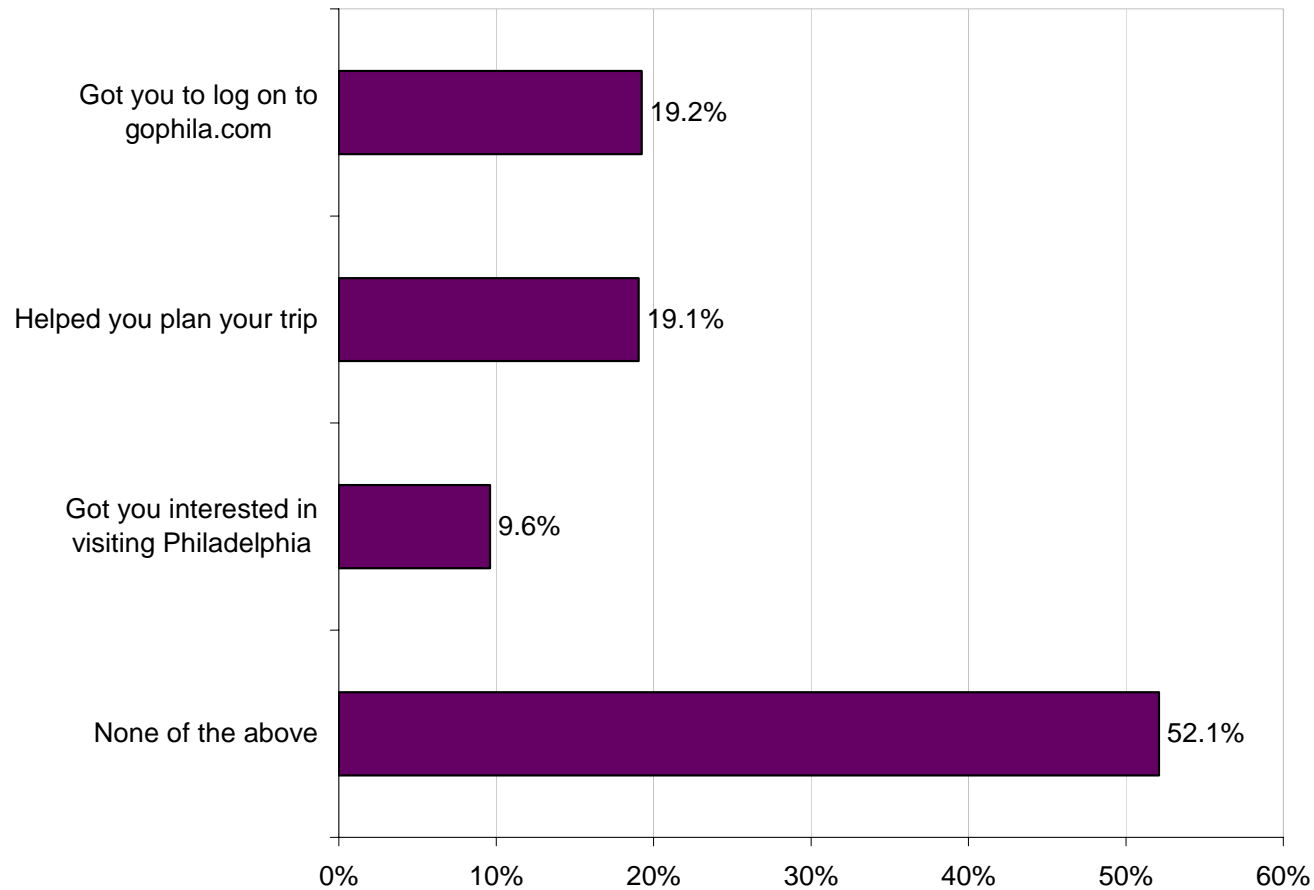


Q11. How did you learn about the hotel accomodations available on gophila.com?

Nearly half of visitors (48%) responded in some way to reading a magazine, newspaper or Internet article about Philadelphia. Articles served as both a trip planner and a trip motivator.



Reading an Article about Philadelphia...

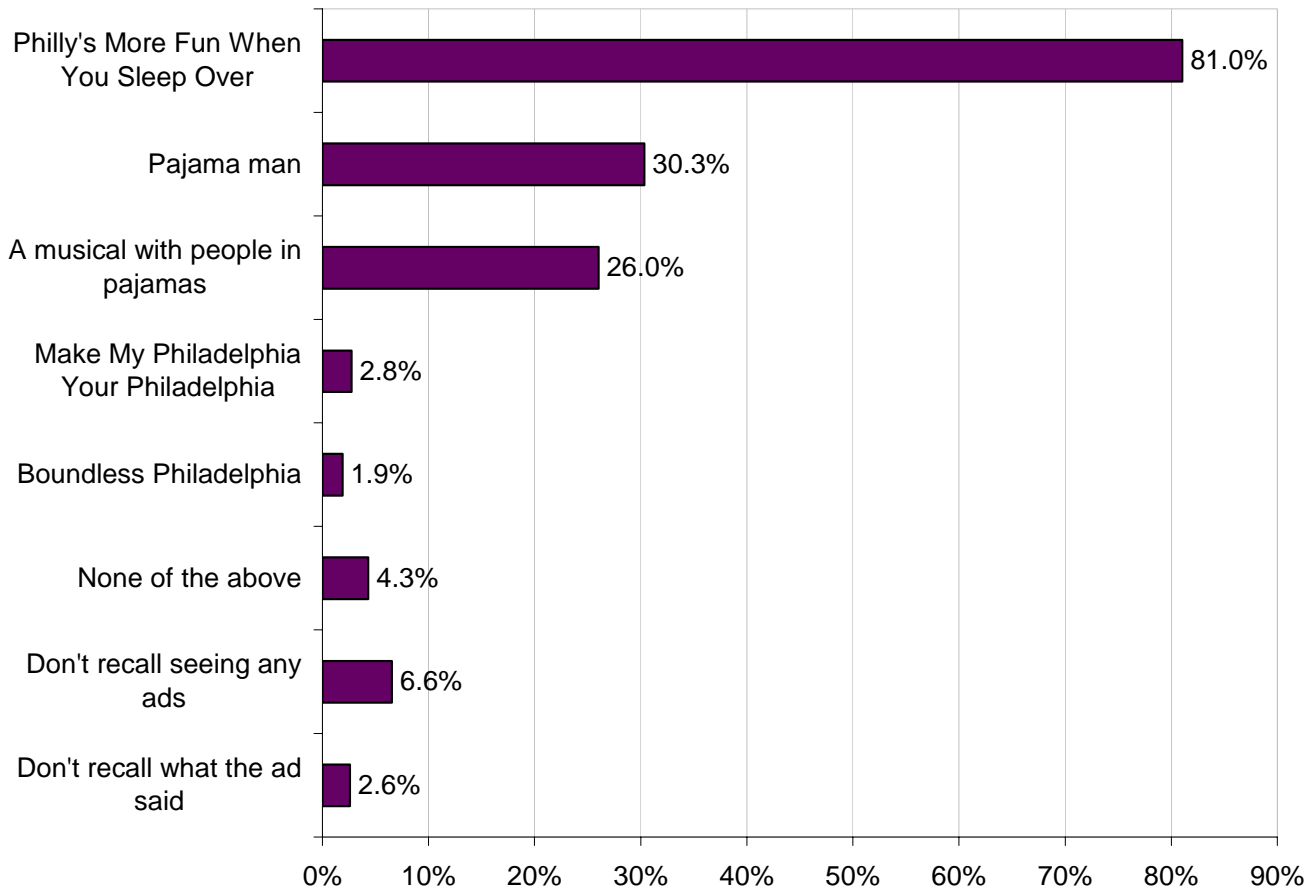


Q13. Reading a magazine, newspaper or internet article about Philadelphia...

GPTMC's "Philly's More Fun When You Sleep Over" slogan gained significant traction and was recognized by 81% of visitors. Pajama man and the musical commercial also fared well, and were recalled by over a quarter of visitors.



Advertising Recall



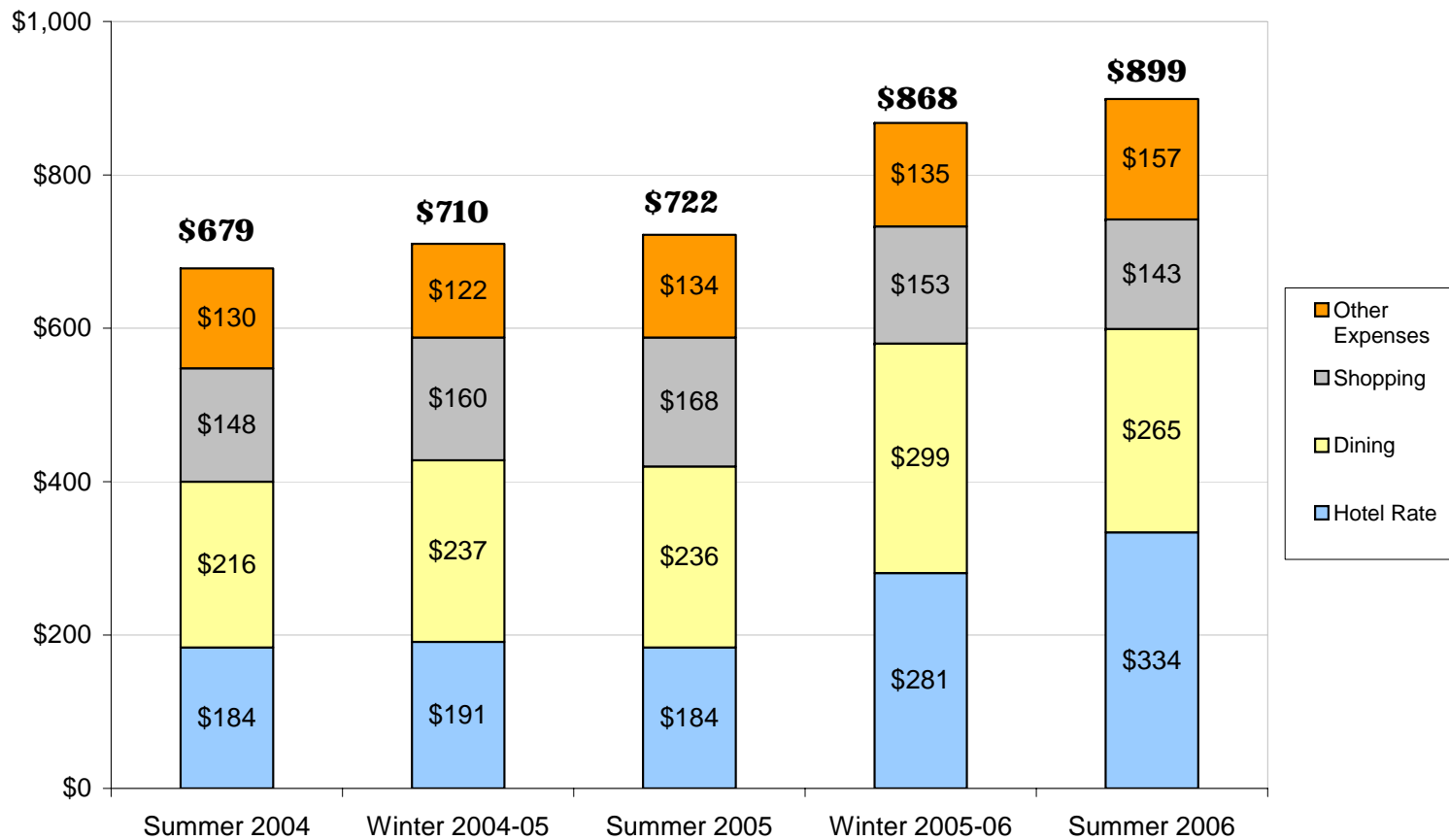
Q12. Do you recognize any of the following from advertising for hotel stays on gophila.com? (select all that apply)

Section III: So Much to Do

Visitor spending in Philadelphia continued to climb in summer 2006, with increasing hotel rates as the catalyst. Dining and other expenses showed increases over summer 2005, while shopping appears to have flattened over the last year.



Visitor Spending

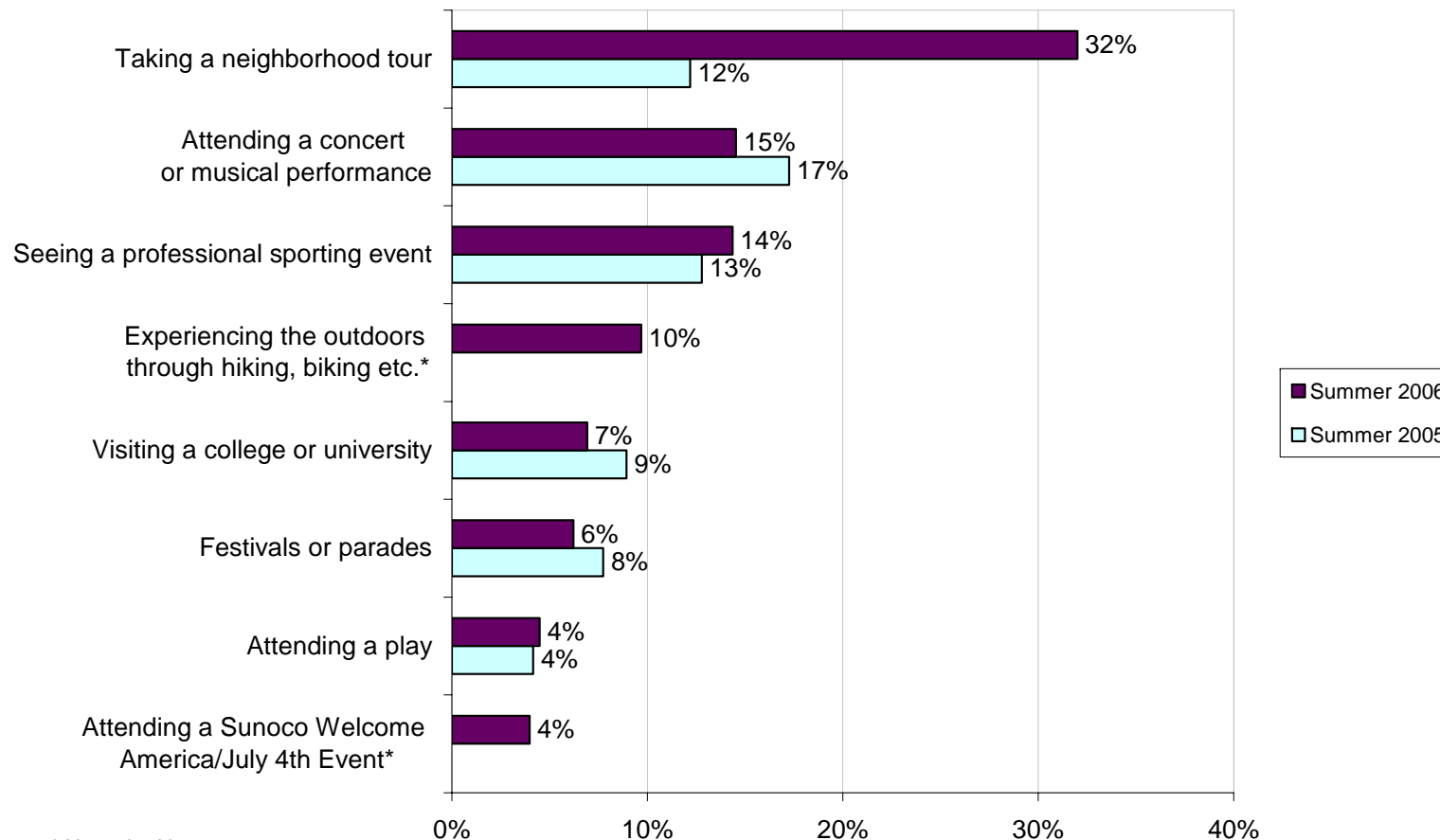


Please estimate for your travel party the total you spent on...

Neighborhood tours were the most popular activity in summer 2006, followed by attending a concert and a sporting event. Experiencing the outdoors also polled well in its first inclusion in the survey.



Activity Participation



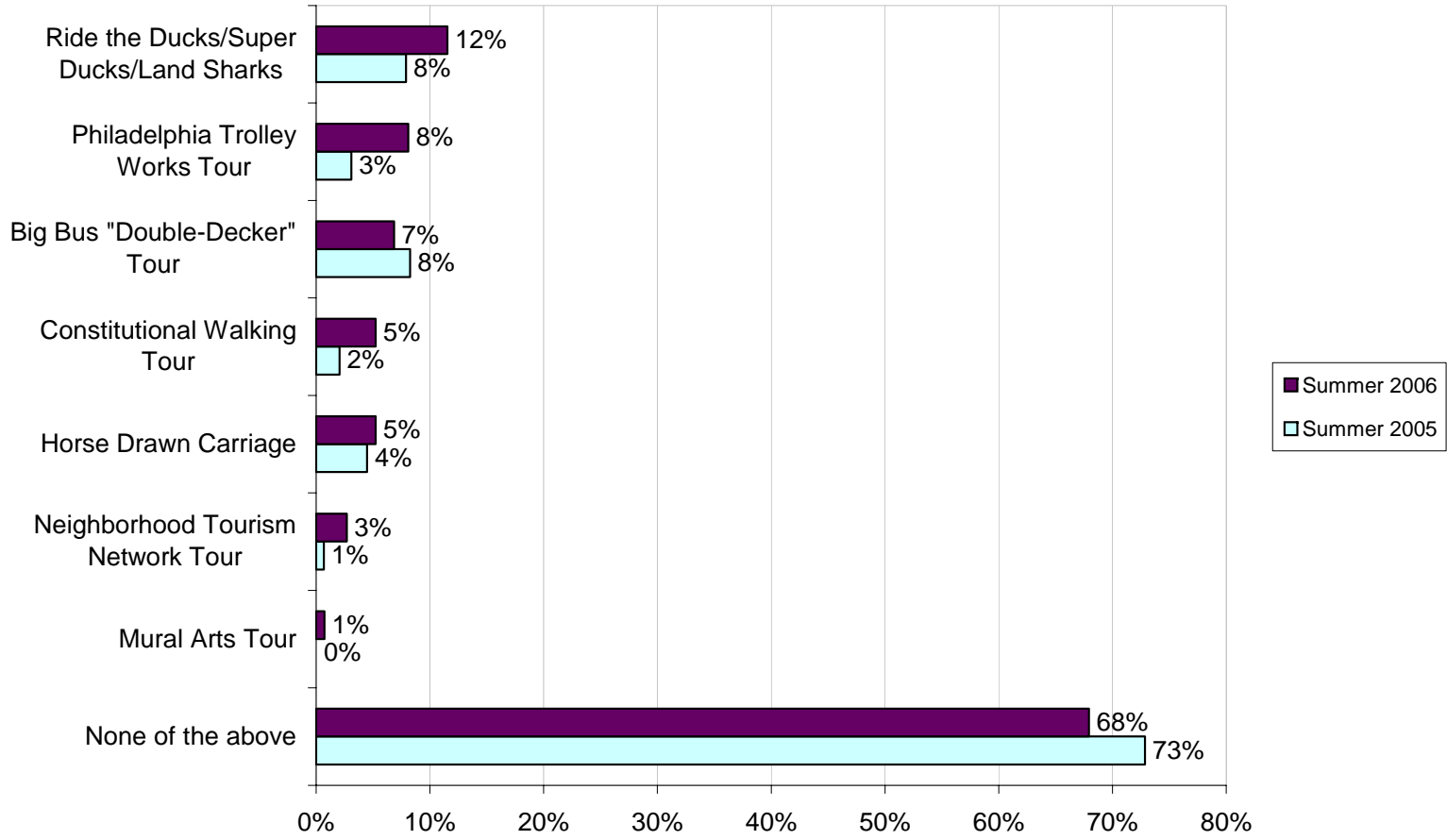
* Not asked in 2005

Q18. Did you participate in any of the following activities during your hotel stay? (select all that apply)

The amphibious tours were the most popular. Overall interest in tours increased from summer 2005, with nearly a third (32%) of visitors taking a guided tour of some kind in summer 2006.



Guided Tours

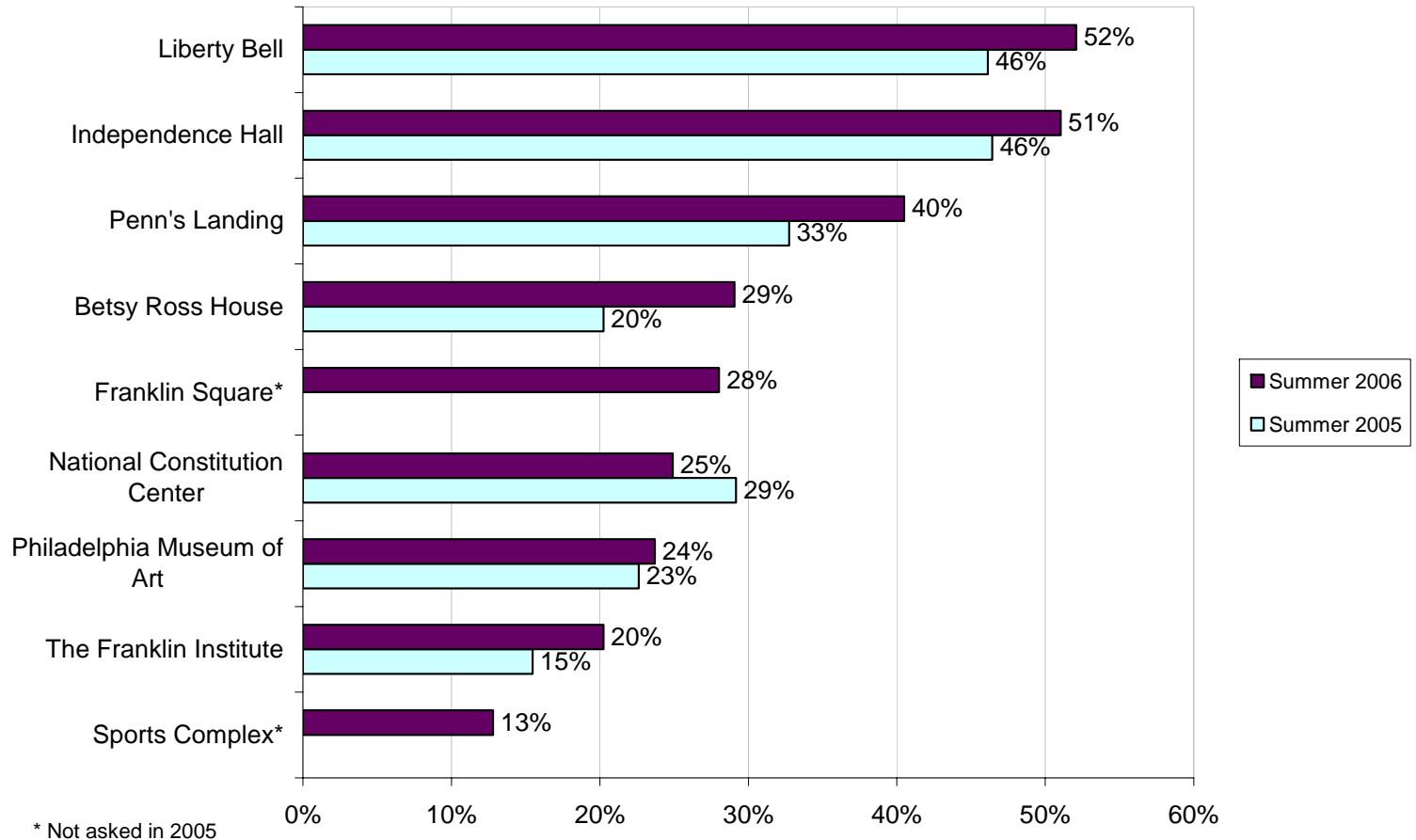


Q20. Did you participate in any of the following guided tours of Philadelphia during your stay? (select all that apply)

The Liberty Bell and Independence Hall again proved the top attractions for summer 2006, creeping over the 50% mark. Other historic district attractions also fared well, including the newly opened Franklin Square.



Attractions Visited

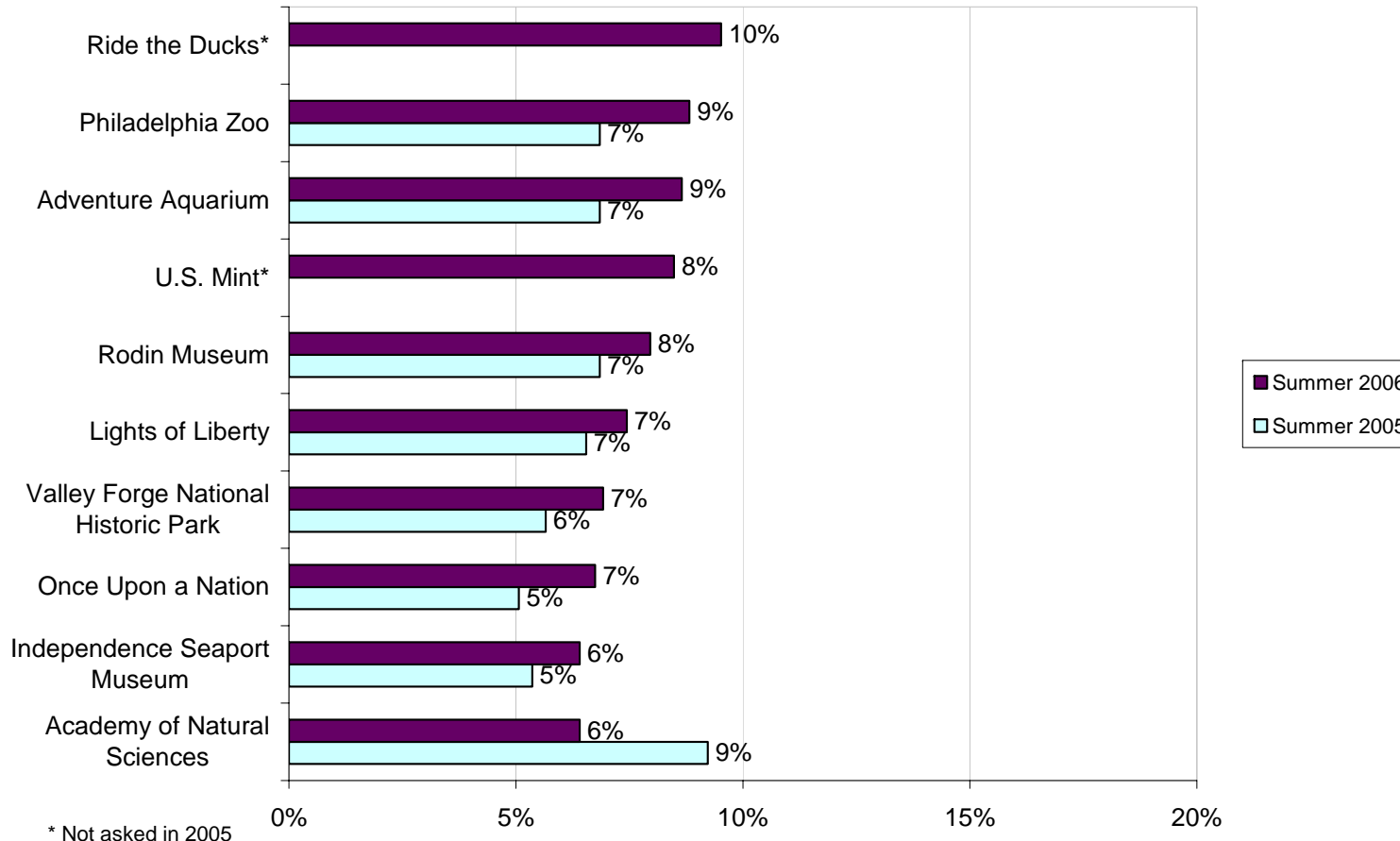


Q17. We'd like to know which attractions and museums you visited on this visit. (select all that apply)

Visitors report seeing museums and other attractions in greater numbers in summer 2006 than summer 2005.



Attractions Visited (II)

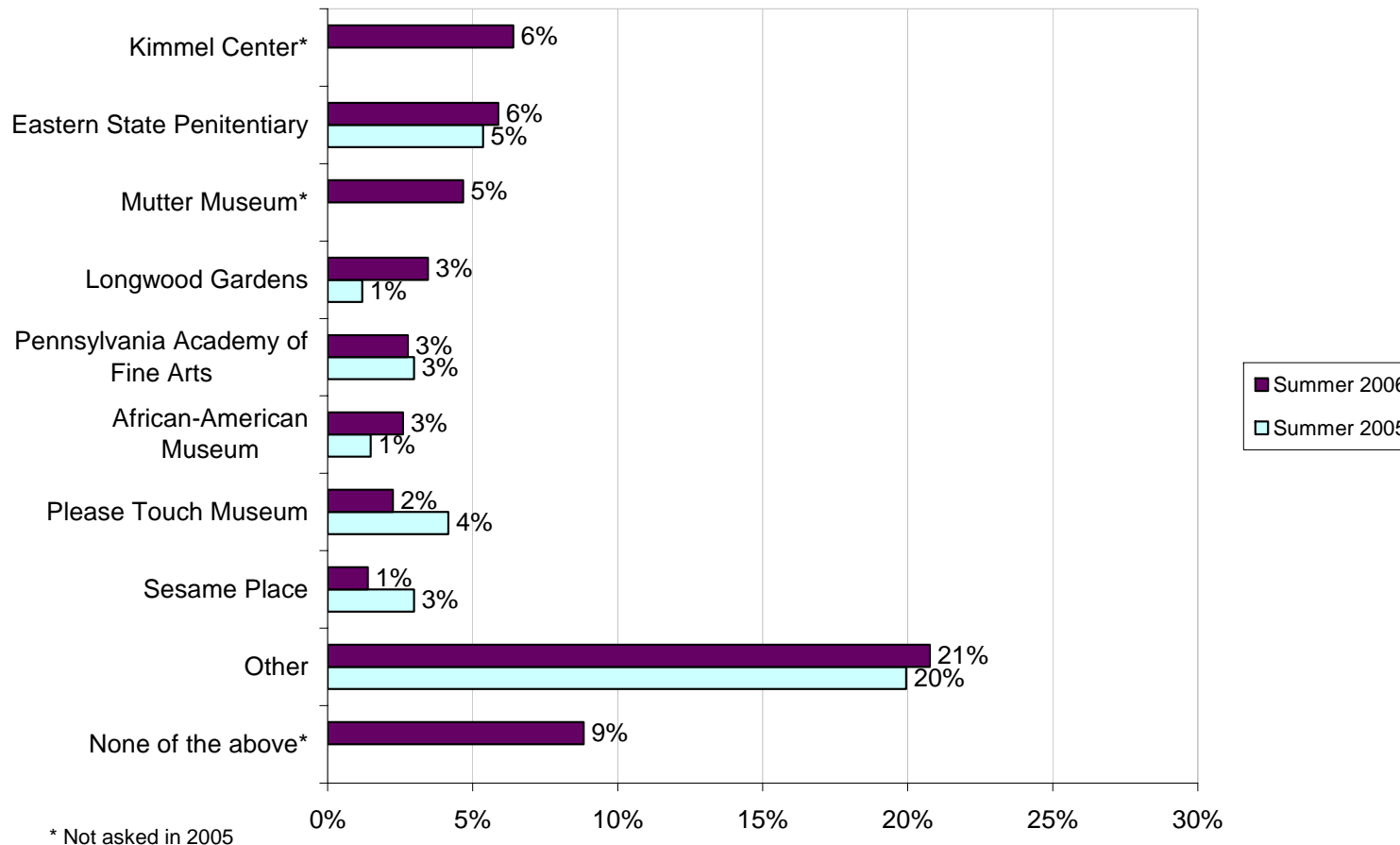


Q17. We'd like to know which attractions and museums you visited on this visit. (select all that apply)

An impressive 91% of visitors visited at least one attraction while in Philadelphia in summer 2006. Over a fifth (21%) visited somewhere beyond the 26 attractions listed, speaking to the diversity of options available.



Attractions Visited (III)

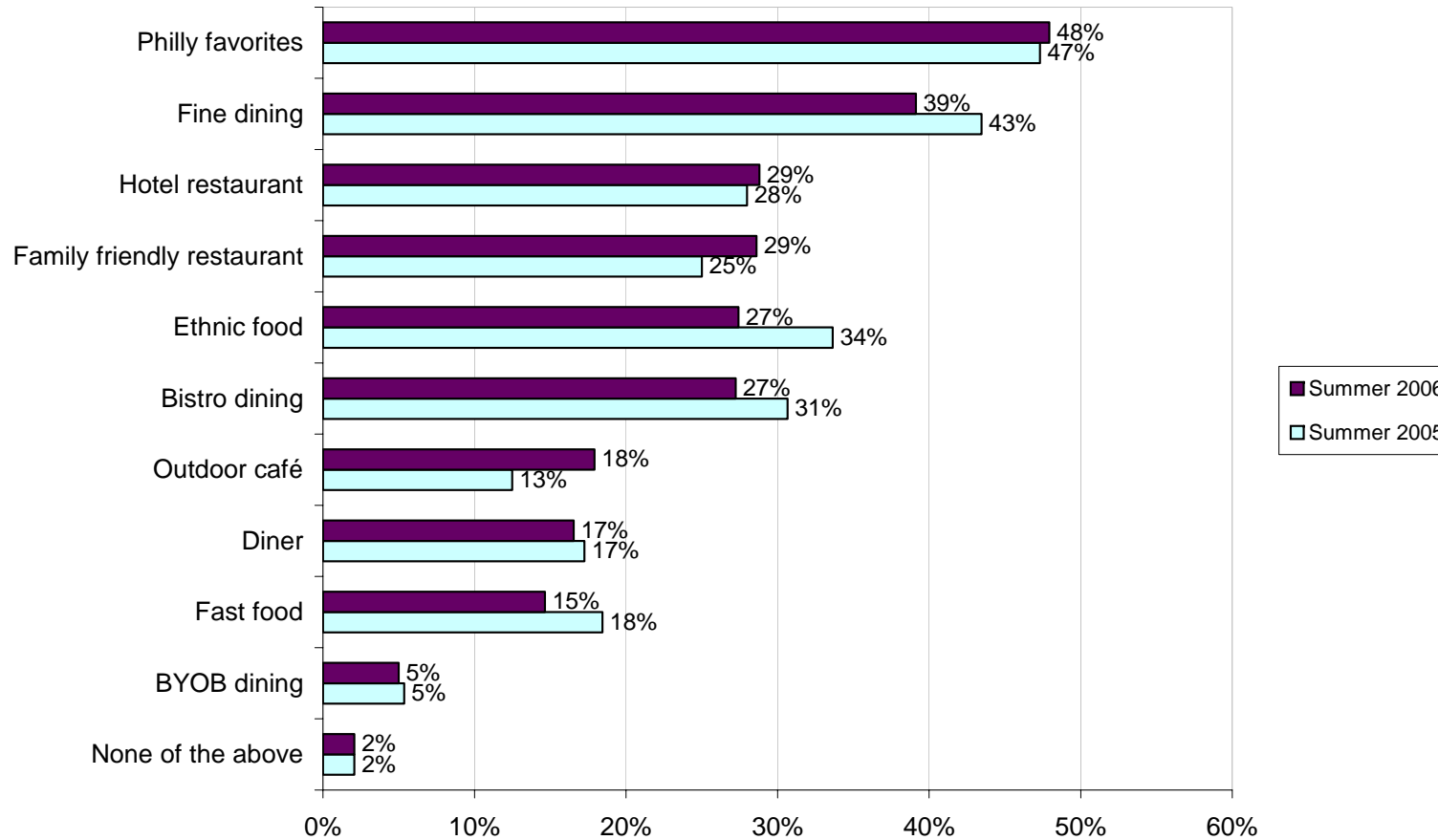


Q17. We'd like to know which attractions and museums you visited on this visit. (select all that apply)

Philly favorites continue to rate as the top dining choice in the summer, with fine dining a strong second. Outdoor cafes proved a popular choice in summer 2006, as the number of cafes open in Center City continues to grow.



Dining Choices

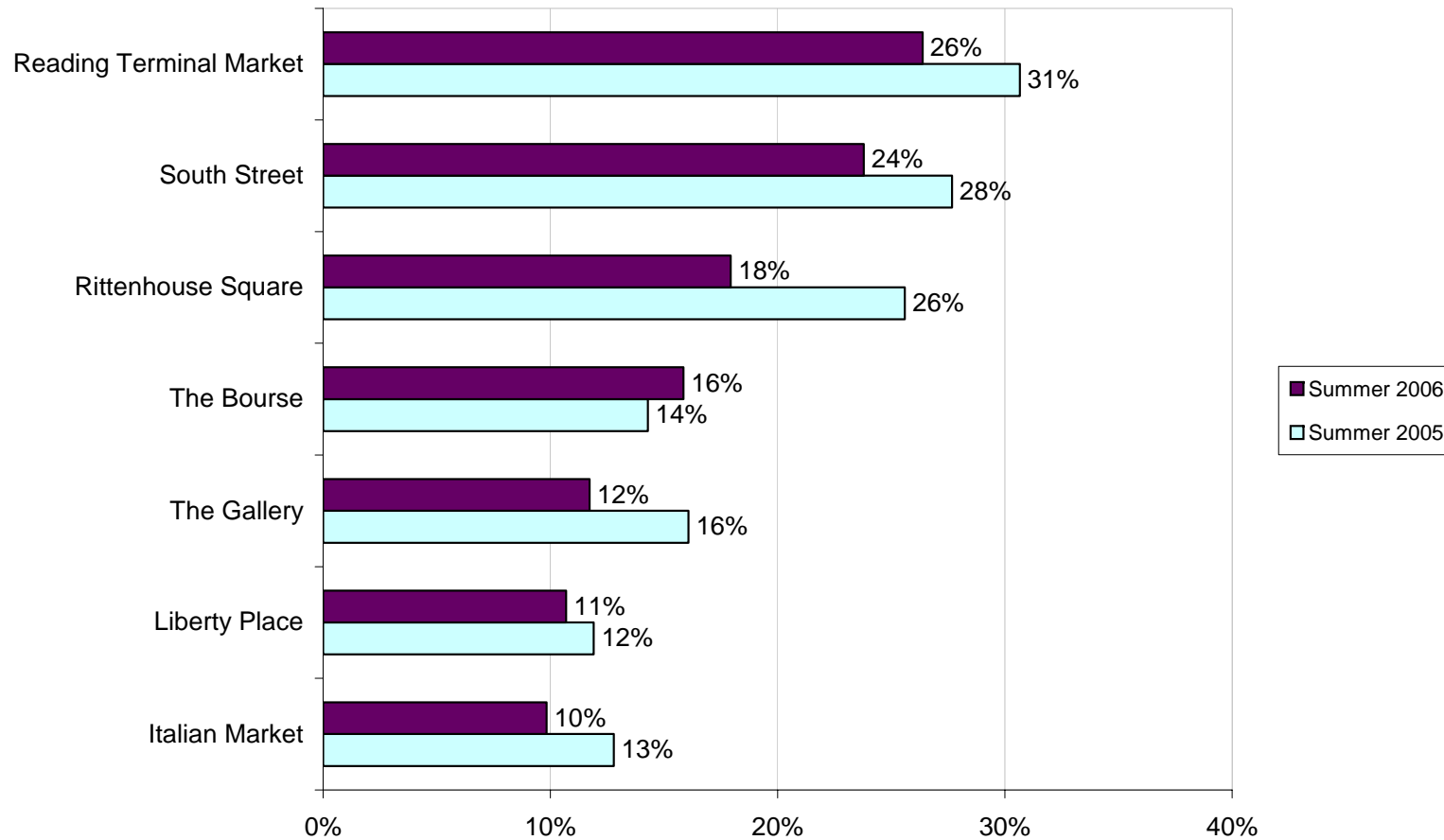


Q21. Which dining activities did you have during your hotel stay? (select all that apply)

Reading Terminal Market was the most popular shopping destination in summer 2006, followed by South Street and Rittenhouse Square. The percentage of shoppers at each of the most popular destinations was down slightly from summer 2005, as was the amount spent on shopping.



Shopping Areas

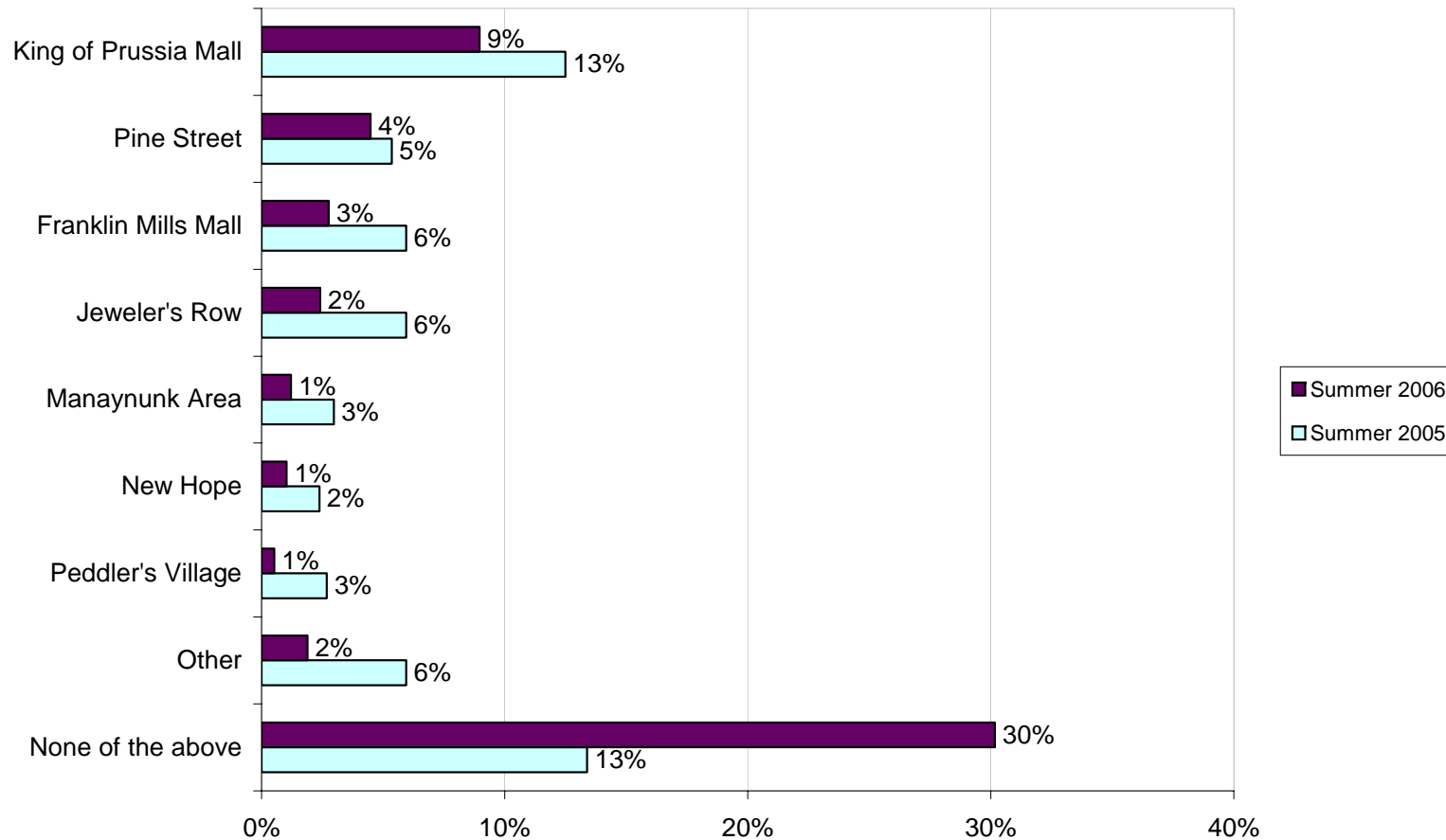


Q22. Please tell us if you did any shopping in any of the following areas during your hotel package stay: (select all that apply)

More visitors to Philadelphia chose to forgo shopping on their visit. In addition to the bigger venues, niche shopping areas such as Manayunk and Peddler's Village saw a decline from summer 2005.



Shopping Areas (II)

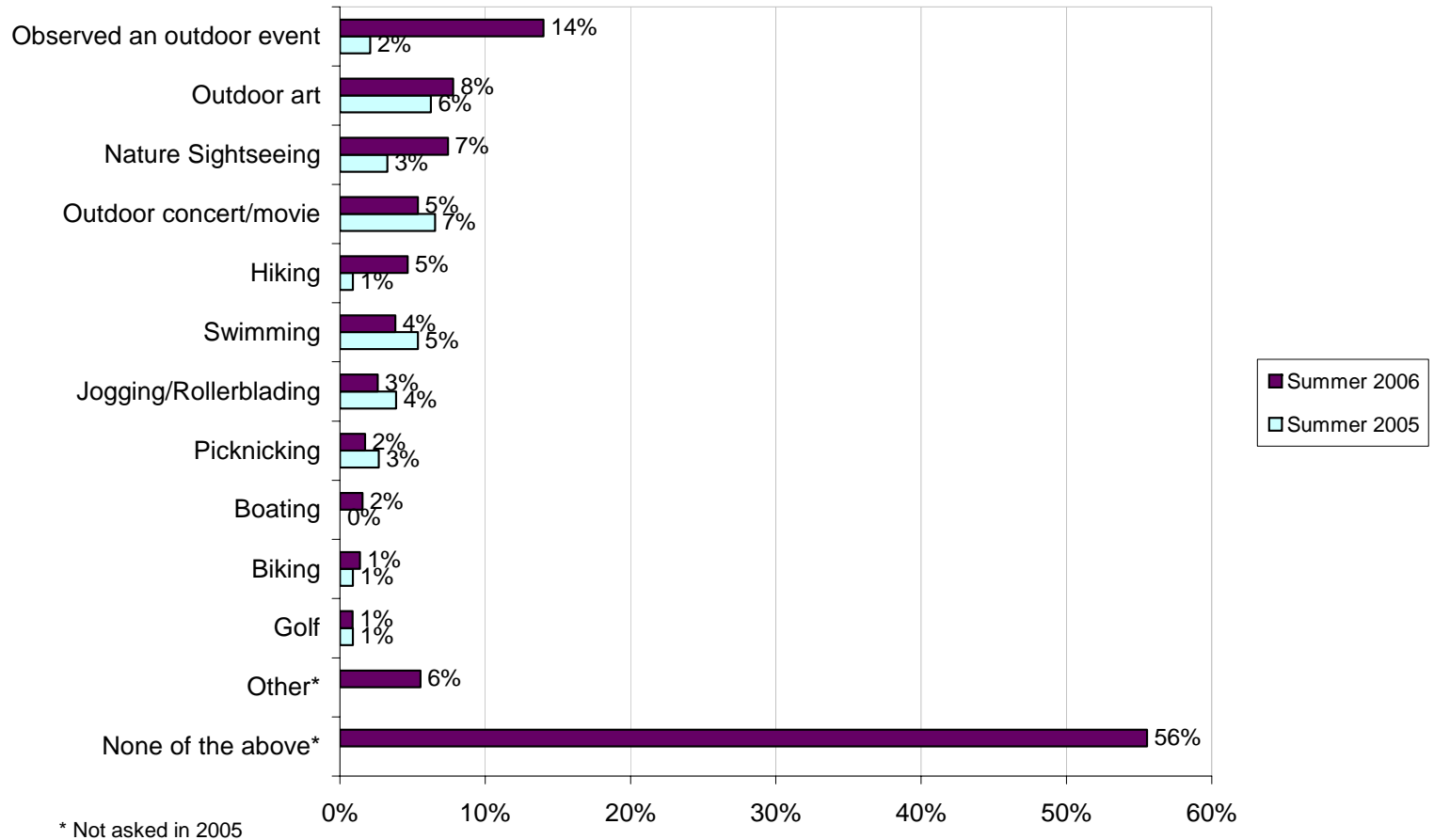


Q22. Please tell us if you did any shopping in any of the following areas during your hotel package stay: (select all that apply)

44% of visitors reported engaging in an outdoor activities in summer 2006. The most popular responses involved observing events in the outdoors rather than actively participating.



Outdoor Activities

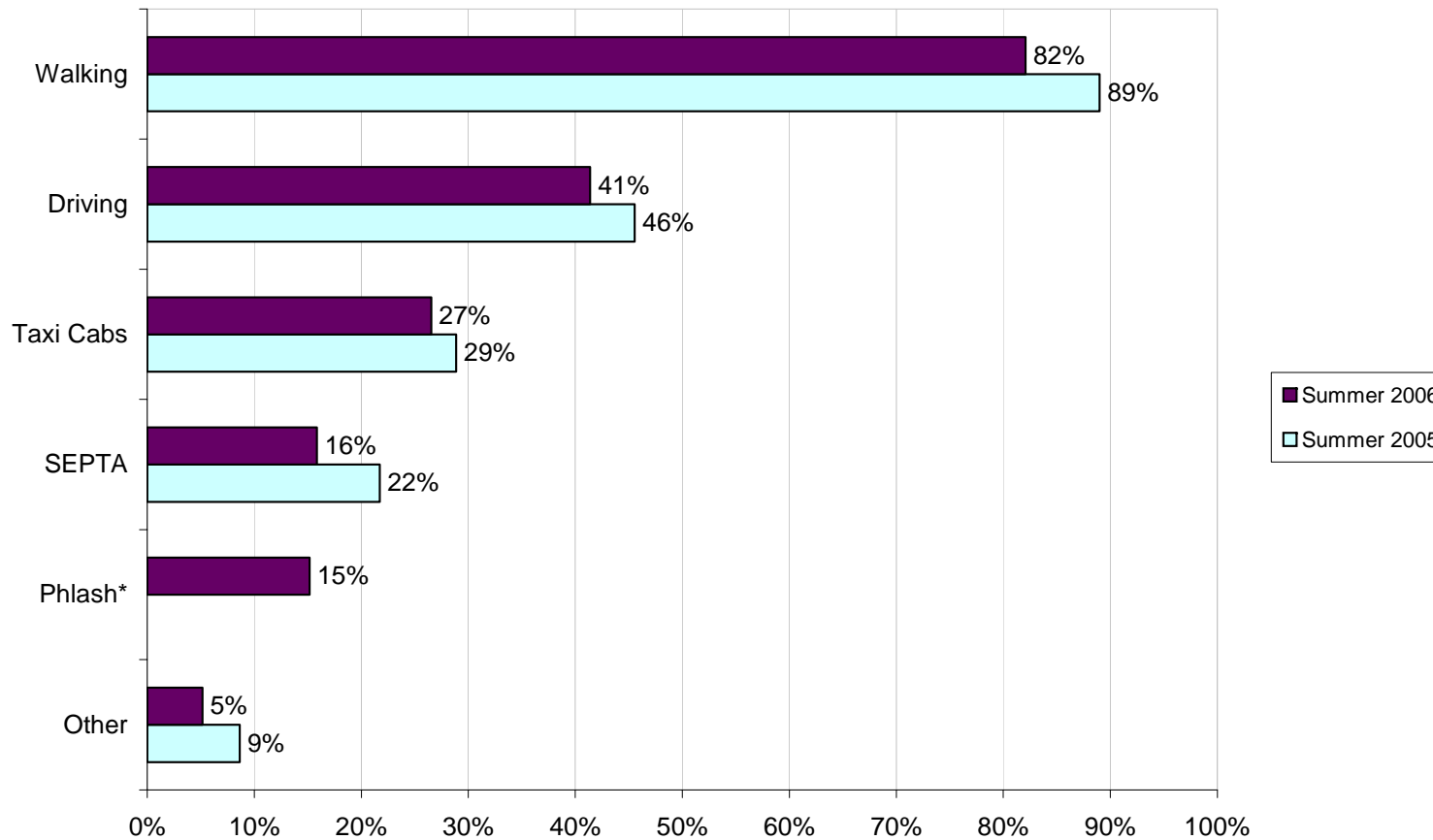


Q19. Did you participate in any of the following outdoor activities during your stay in Philadelphia? (select all that apply)

Philadelphia continues to be a walking city, with 82% of visitors walking around during their stay. The Phlash proved nearly as popular with visitors as SEPTA.



Getting Around Philadelphia



* Not asked in 2005

Q23. How did you get around while you were on this trip to Philadelphia? (select all that apply)

Section IV: One-Time and Multiple-trip Visitors

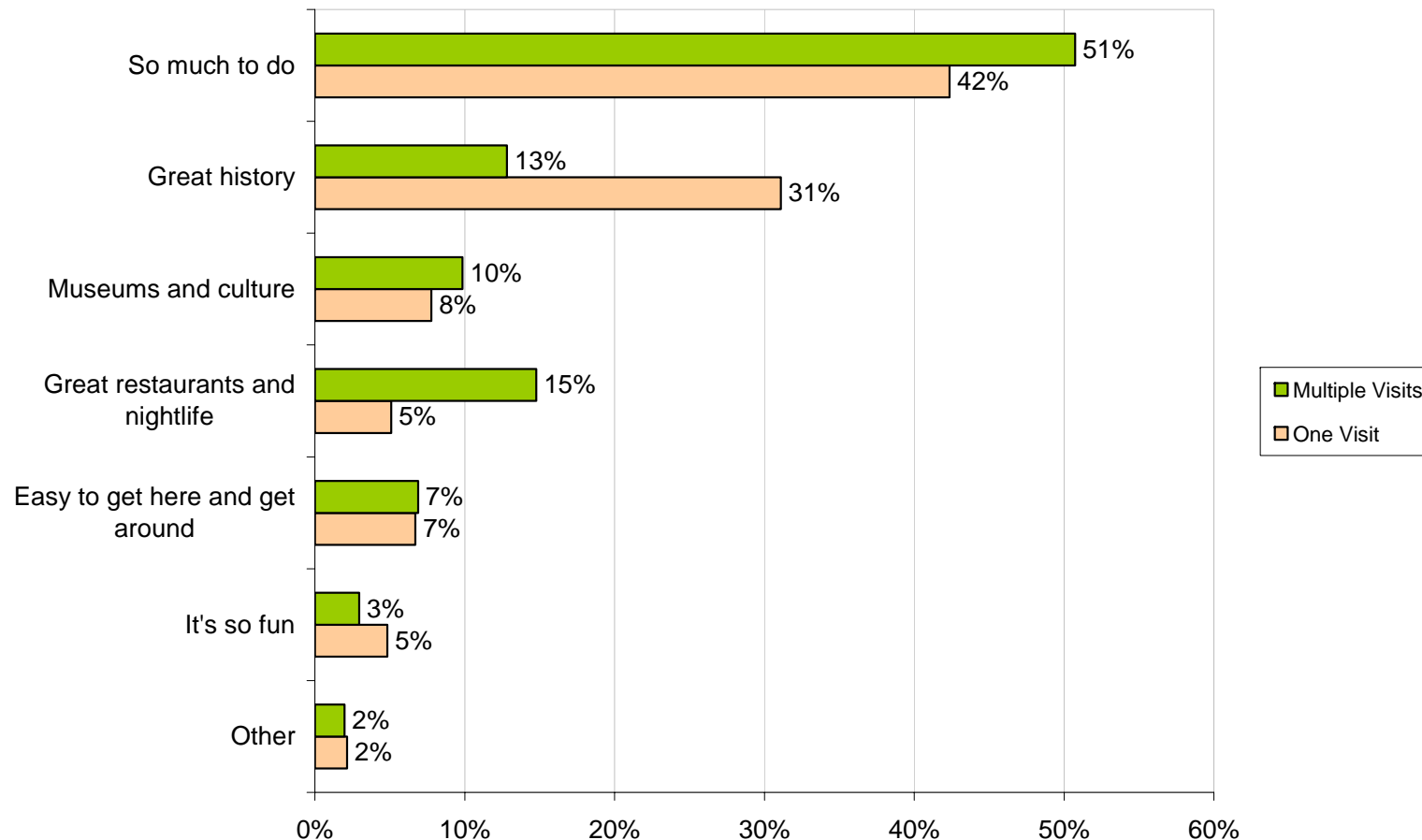
BACKGROUND

- The hotel package and gophila.com as a booking engine have generated a loyal following. We can now look at how visitors who have made only one trip in the past year differ from those who have made multiple trips.
 - **375** respondents made one visit in the past year
 - **204** respondents made multiple visits in the past year

Multiple-trip visitors overwhelmingly offer “so much to do” as the top reason to visit Philadelphia, with restaurants and culture coming in second. One-time visitors are far more interested in the history, with nearly a third identifying it as their main reason to visit.



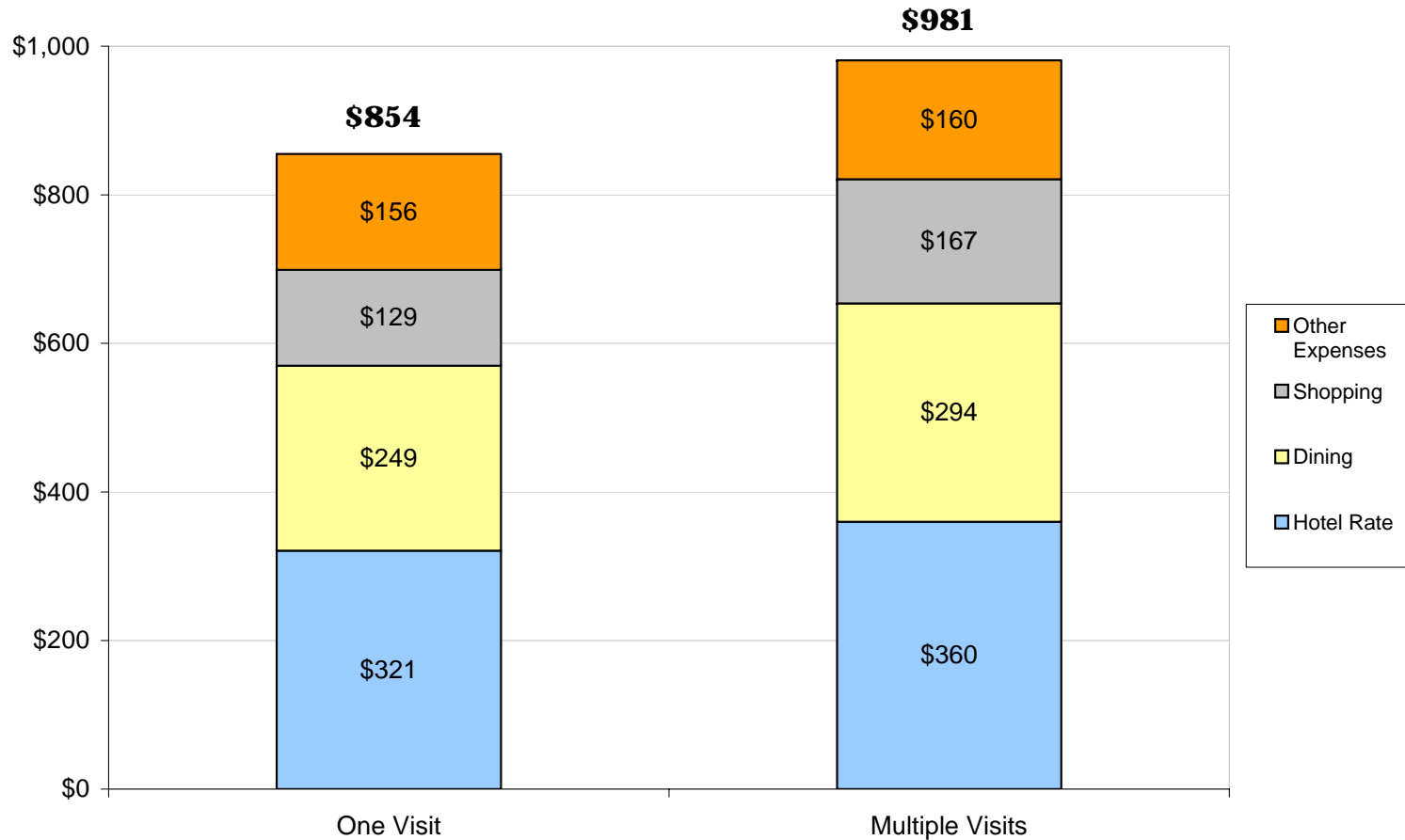
Reason to Visit



Q5. If you could offer people you meet one reason they should visit Philadelphia and the Countryside, what would that reason be?

Multiple-trip visitors spend more in every category, making “so much to do” a description of their visit, in addition to their reason to come.

Visitor Spending

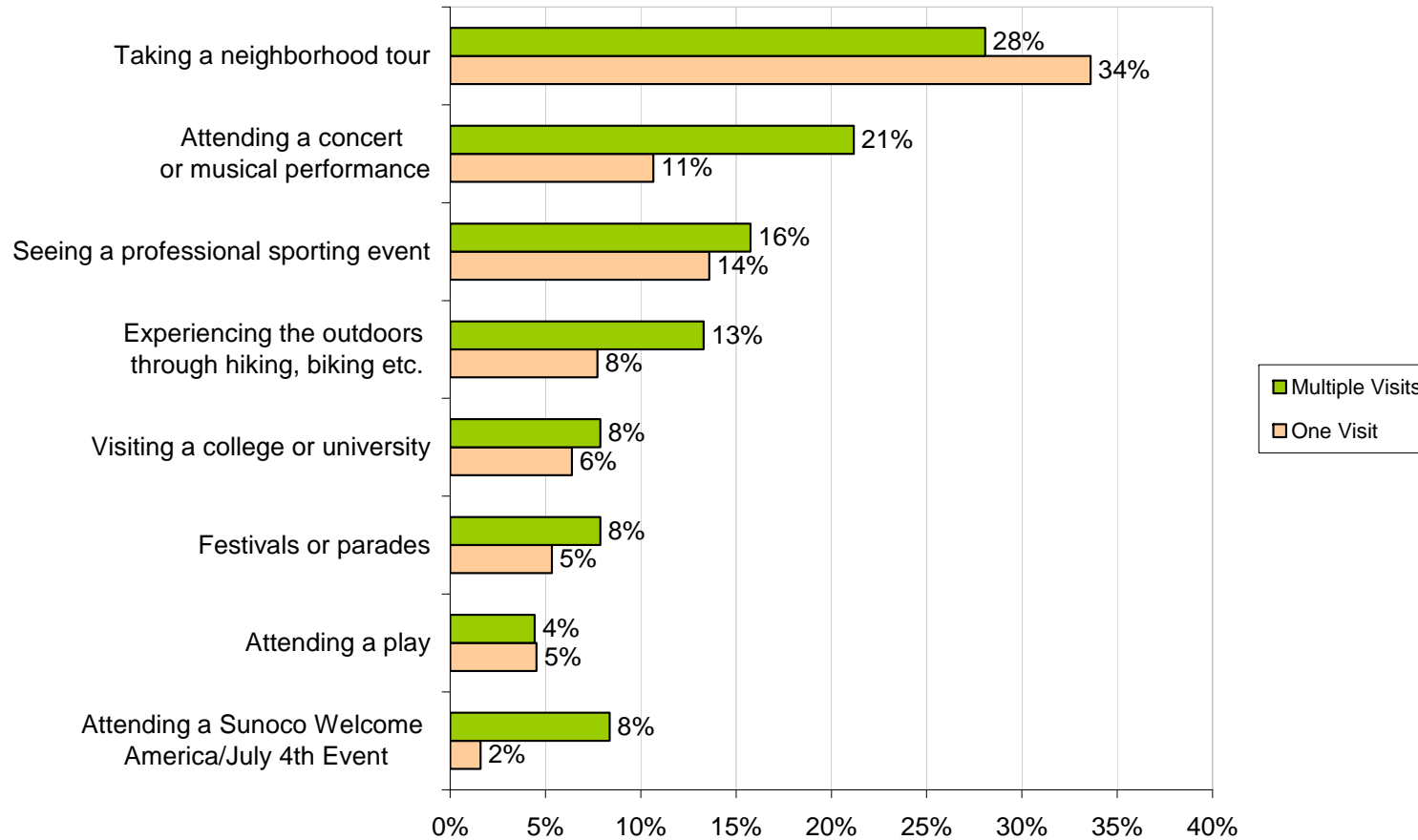


Please estimate for your travel party the total you spent on...

Multiple-trip visitors go to more concerts, sporting events and festivals, while one-time visitors concentrate on visiting the historic attractions.



Activity Participation

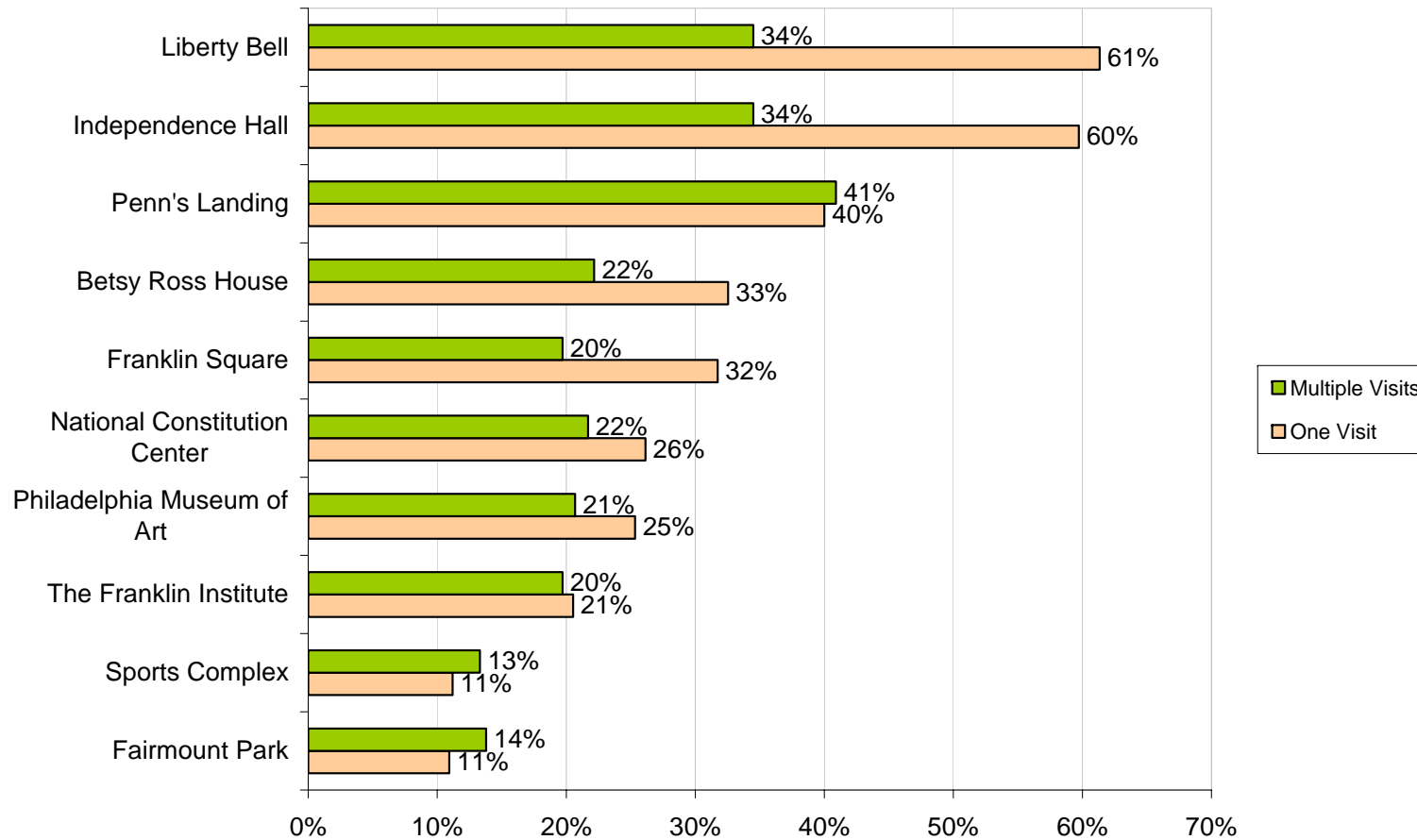


Q18. Did you participate in any of the following activities during your hotel stay? (select all that apply)

Of the designated list of 26 attractions, one-time visitors go to an average of four and multiple-trip visitors go to an average of three during their hotel stay.



Attractions Visited

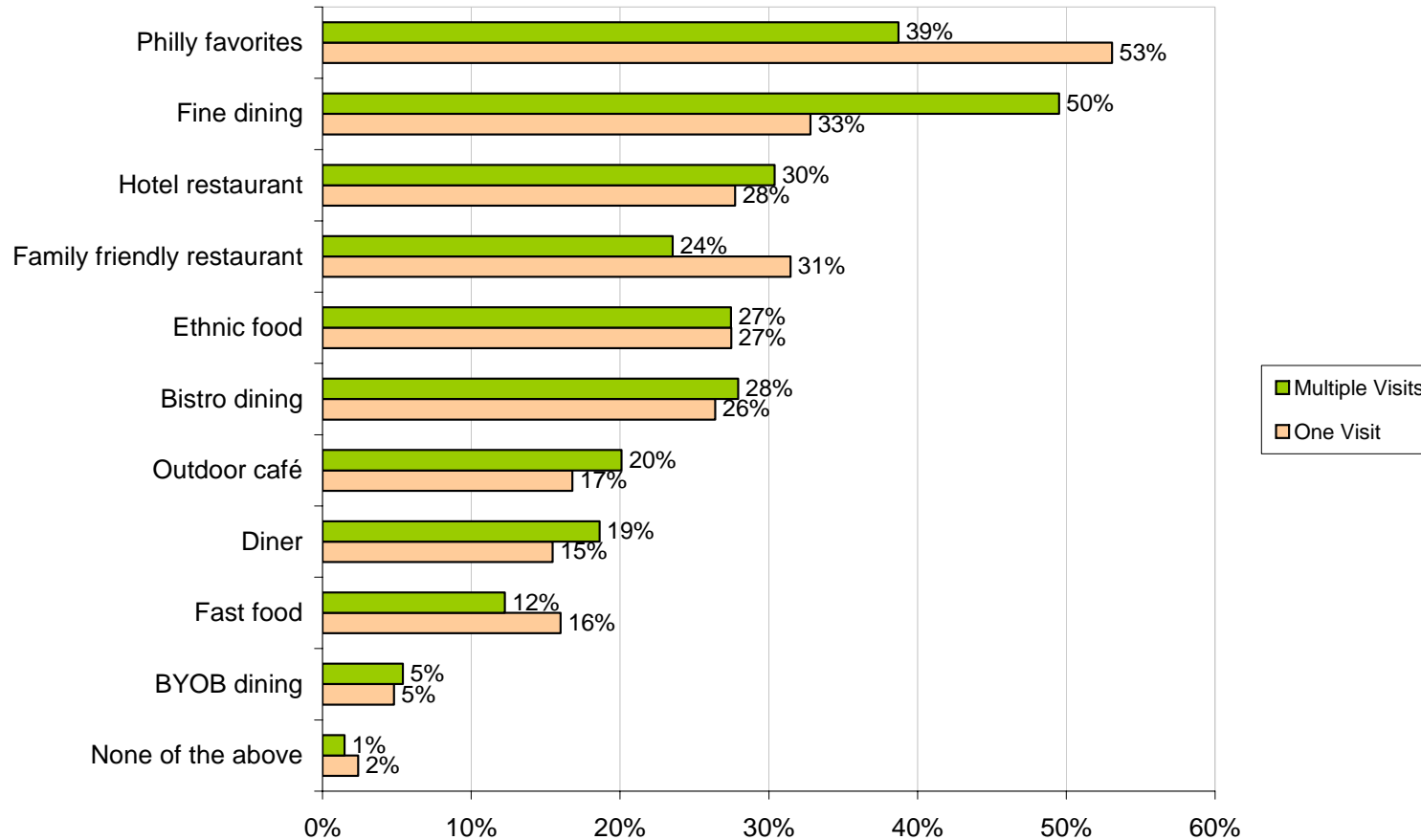


Q17. We'd like to know which attractions and museums you visited on this visit. (select all that apply)

While one-time visitors pegged Philly favorites as their top dining choice, multiple-trip visitors chose fine dining. This contributes to the higher rate of spending on dining (\$294) by multiple-trip visitors compared to one-time visitors (\$249).



Dining Choices



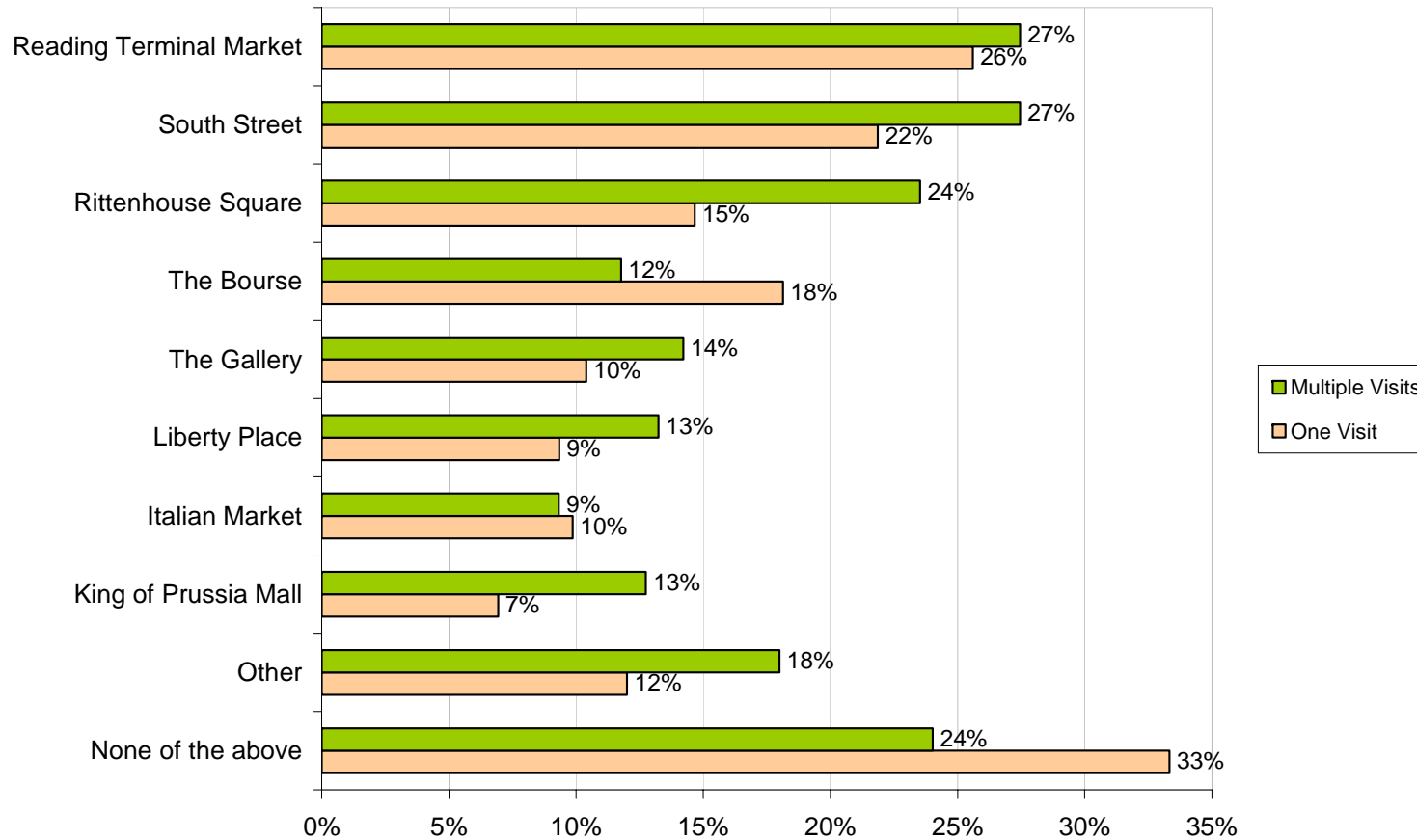
Q21. Which dining activities did you have during your hotel stay? (select all that apply)

Multiple-trip visitors do more shopping, reflected in the amount they spend, the number who say they shop and the variety of shopping destinations.



Shopping Spending: \$167 vs. \$129
Shoppers: 76% vs. 67%

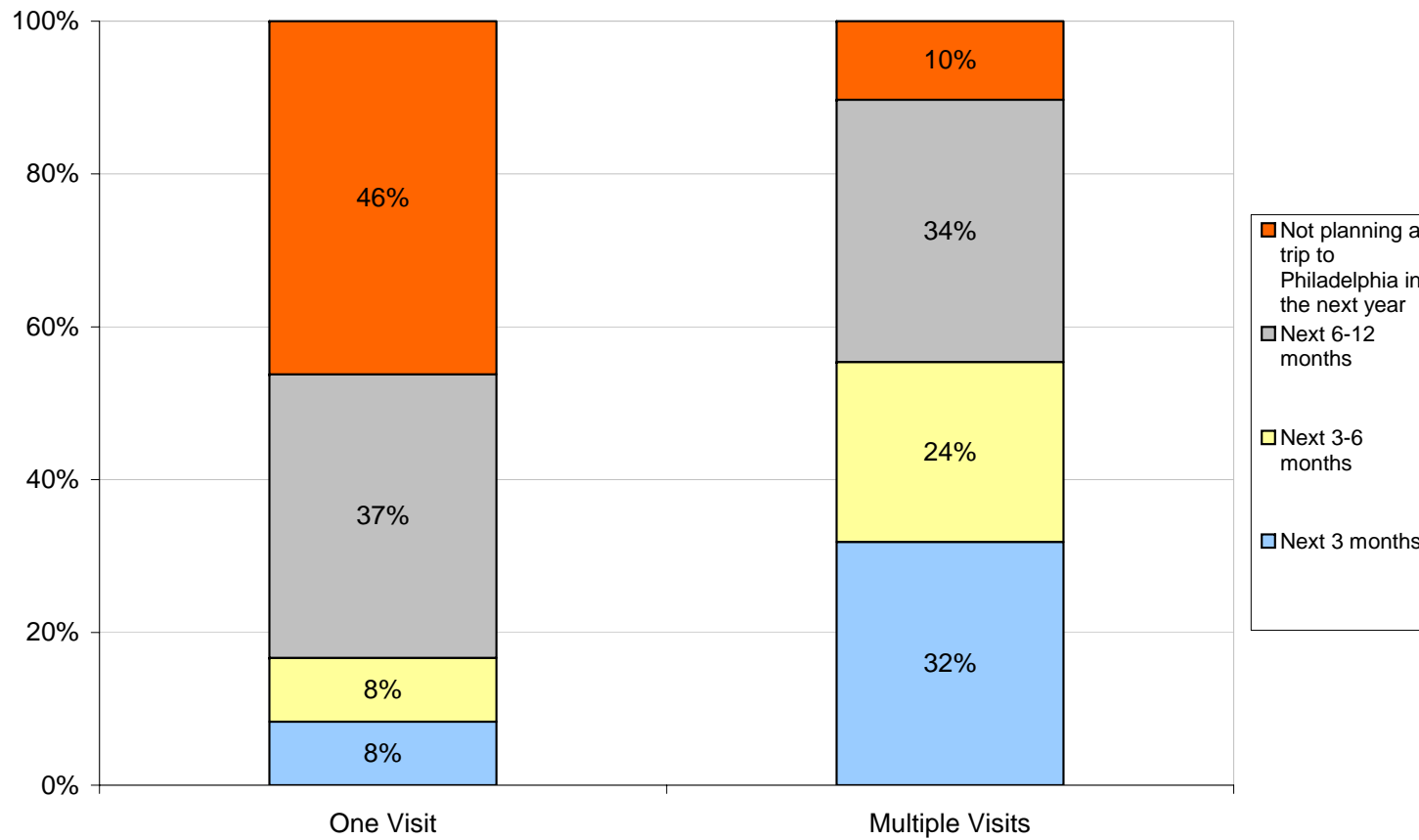
Shopping Areas



Q22. Please tell us if you did any shopping in any of the following areas during your hotel package stay: (select all that apply)

Intent to return within the next year was far higher among multiple-trip visitors, suggesting a committed group of travelers who sleep over and over again.

Return Visitation to Philadelphia



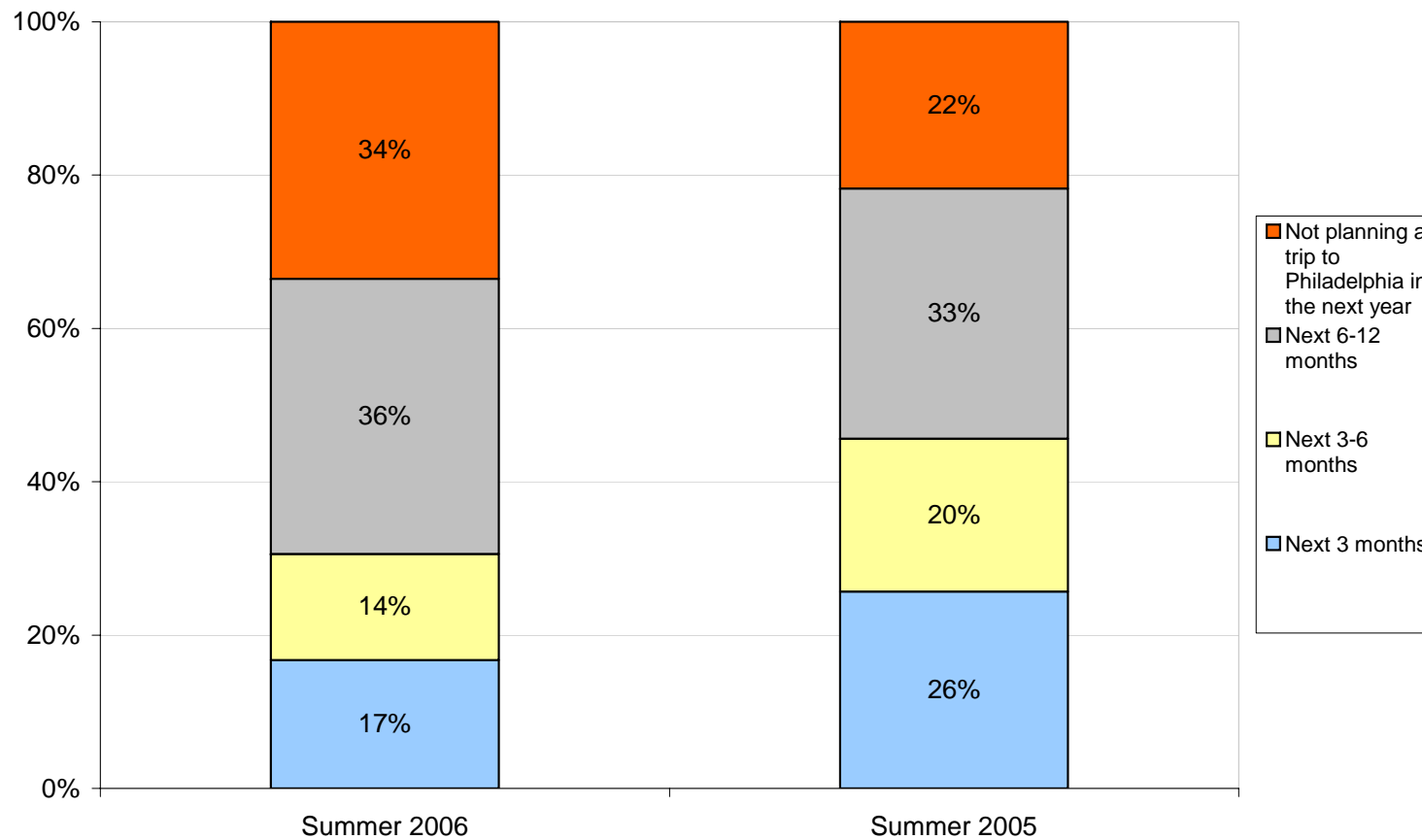
Q32. Are you planning a trip to Philadelphia in the coming year?

Section V: After the Trip

Intent to return declined somewhat in summer 2006 from the levels of summer 2005. This may be a reflection of the greater number of one-time visitors included in the survey, a group less inclined to return within a year.



Return Visitation to Philadelphia

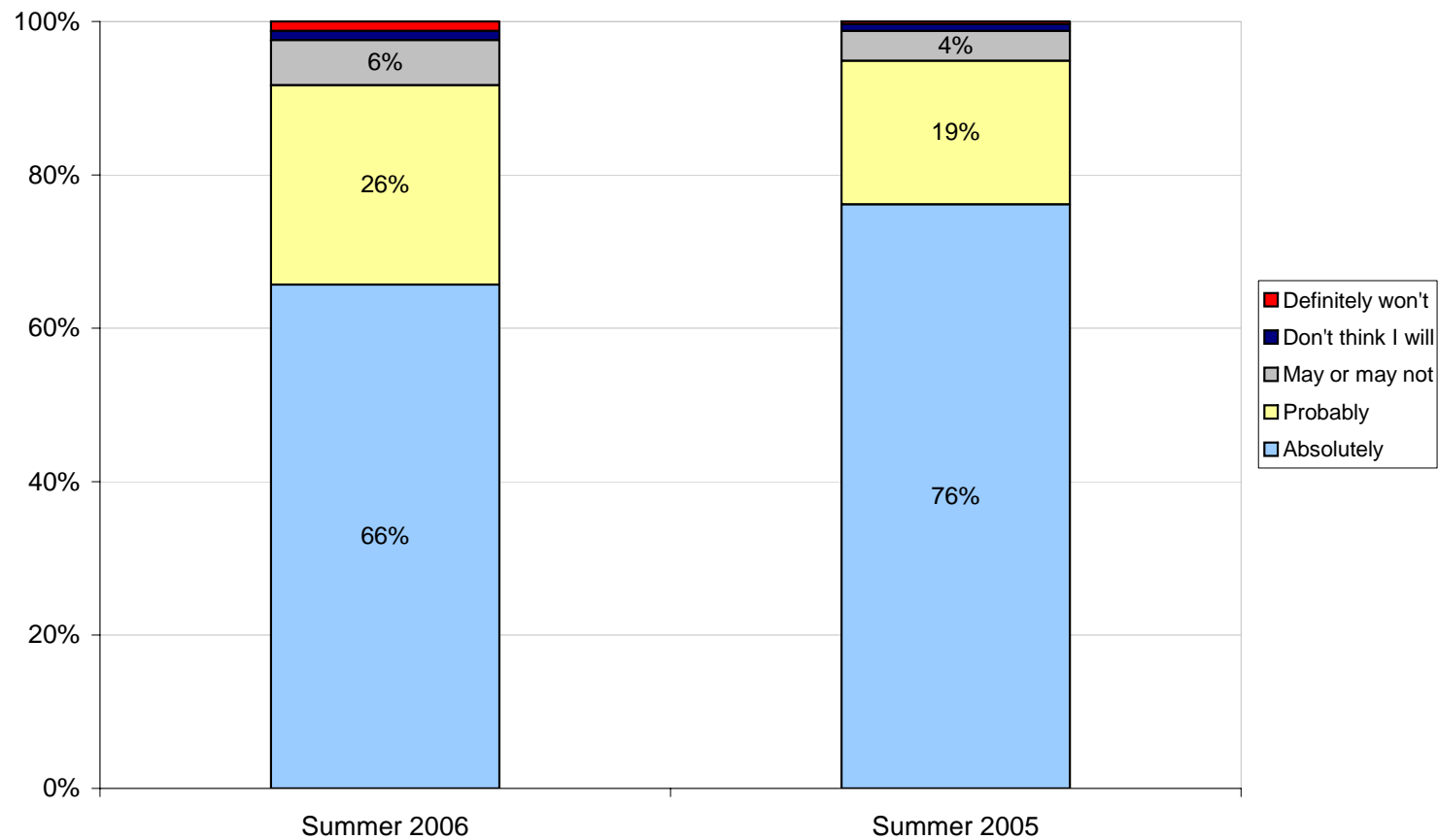


Q32. Are you planning a trip to Philadelphia in the coming year?

Satisfaction with gophila.com remains high, although the number of visitors who said they would “absolutely” return to gophila.com to book another hotel stay was down from summer 2005.



Returning to Gophila.com to Book another Hotel Stay

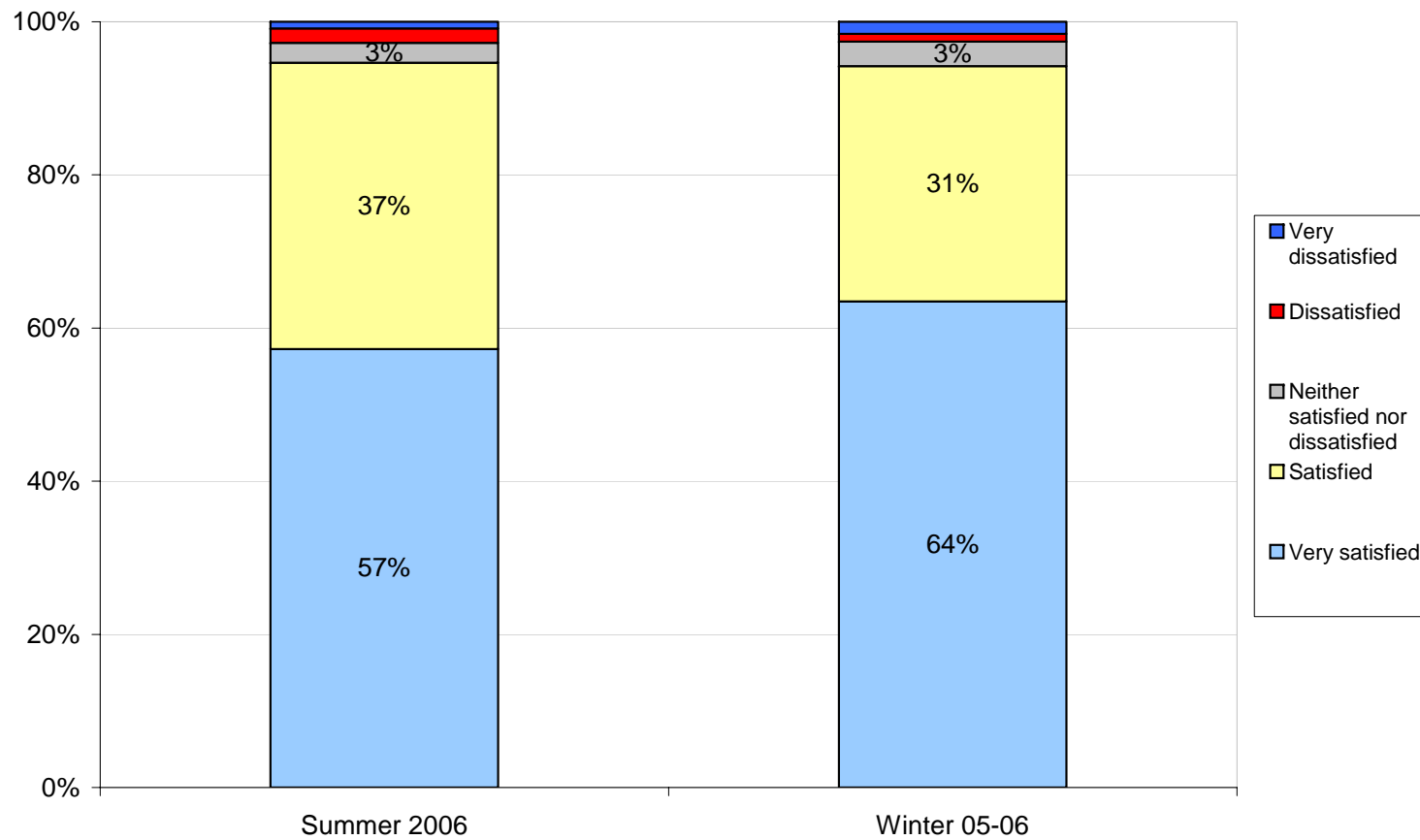


Q31. Would you return to gophila.com to book another hotel stay in the future?

Trip satisfaction remains strong, with 94% of visitors either “satisfied” or “very satisfied” with their visit to Philadelphia.



Trip Satisfaction

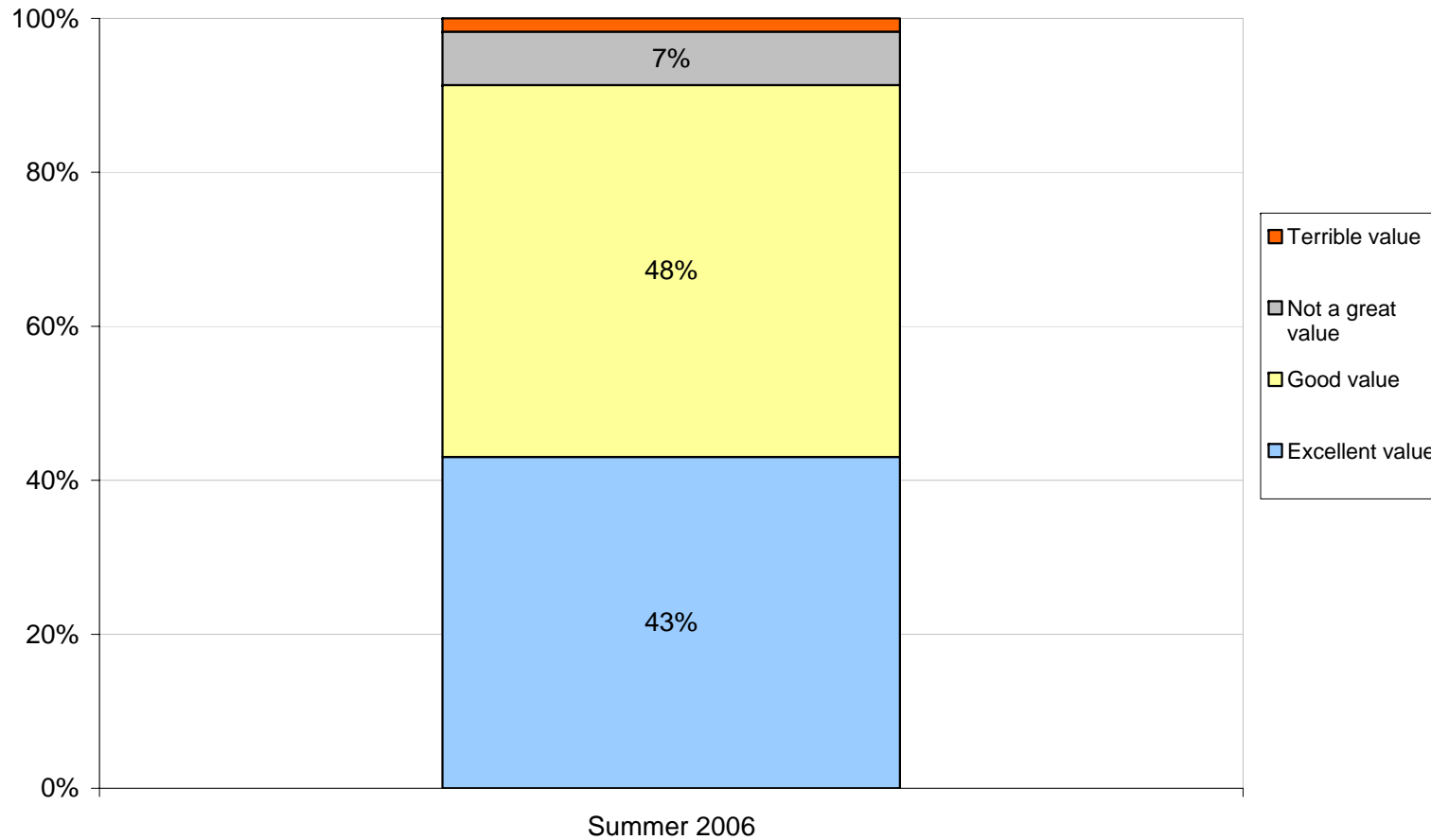


Q25. Overall, how satisfied were you with your trip to Philadelphia?

Gophila.com hotel offers appear to be very well regarded, with 91% of visitors assessing their stay as either an “excellent” or a “good” value.



Value of Hotel Stay



Q16. Overall, how would you assess the value of the hotel stay you booked through gophila.com?

Section VI: Conclusions

CONCLUSIONS



- Increased diversity in visitors' point of origin, but not in other demographic categories.
 - Implication: Internet helps for expanding geographic reach, but current messaging reaches white; well-to-do; average age 40+
- The “so much to do” message reflects why visitors like visiting and how they spend their time:
 - 45% mention “so much to do” as the main reason to come
 - An average of 3.7 attractions visited per 2 night trip (not including dining and shopping)
 - Implication: the messaging and the benefits of an urban destination vacation are both on-point for Philadelphia
- Integrated marketing reinforces a single brand message
 - 81% recognize (prompted) *Philly's More Fun When You Sleep Over*
 - 68% learn about booking hotel rooms on gophila.com from an on-line source (gophila.com; search engine; Internet ad)
 - 48% are led to check out Philadelphia after reading/hearing an article or news story

CONCLUSIONS (II)



- The hotel package is a valuable product
 - 60% *strongly agree* that they booked on gophila specifically for the package
 - Trip spending has increased each season, reaching \$899 this summer
 - The package is perceived to be a good value by 91% of visitors, even with hotel prices rising
 - Implication: the package should not go away and, in fact, could be offered more frequently
- Philadelphia is a different experience for those who come many times
 - For multiple-trip visitors, there's more shopping, more fine dining, more live performance, fewer historical (and other) attractions, and more money spent
 - Implication: multiple-trip visitors are more likely to have the “so much to do” experience and be the evangelists we want (93% do recommend)