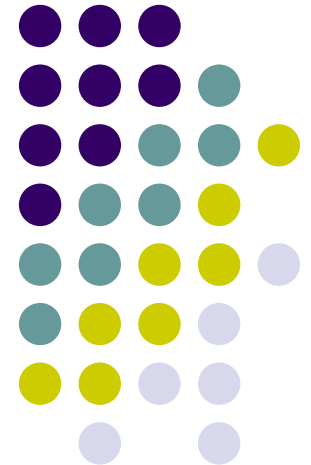


Summer 2007 Gophila.com Hotel Visitor Survey

November 2007





Contents

- ❑ Background and Methodology
- ❑ Hotel Visitor Experience
- ❑ Geographic Breakdown
- ❑ Gophila.com Hotel Offers

Background



- The Summer 2007 hotel survey report covers the period from June 15, 2007 to September 15, 2007, which is referred to as the Summer 2007 hotel season. During that time, 2,972 reservations booked on gophila.com were consumed.
- The following hotel offers were available on gophila.com during this time:

	Total	Respondents
Individual Room Night(s)	1,083	121
King Tut Hotel Package	1,349	253
Philly Overnight Hotel Package	519	137
Philly Like a Local Package	21	4
Boundless Philadelphia Hotel Package	13	3

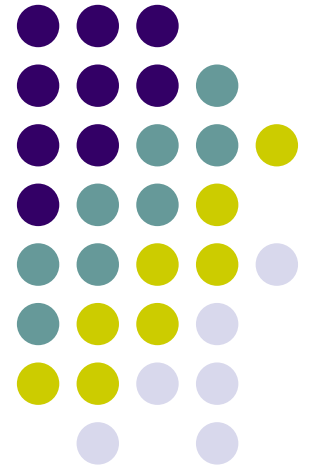
- Hotel rooms sold on gophila.com represent about 1% of 700,000 annual leisure hotel rooms sold in Center City. Survey findings are specific to gophila.com hotel visitors, and cannot be assumed to represent all leisure hotel visitors to Greater Philadelphia.

Methodology



- ❑ GPTMC mailed a survey invitation to all summer hotel visitors who booked through gophila.com.
- ❑ A total of 2,842 invitations were sent out, with 518 completed surveys for a response rate of 18.2%.
- ❑ As an incentive, respondents were offered the chance to win \$300 in American Express Gift Cheques.
- ❑ The error rate for survey findings is +/- 4.4% at 95% confidence.
- ❑ Percentages are rounded and, therefore, some graphs do not total precisely 100%.
- ❑ Questions as they appeared in the survey are listed on the bottom of each page.
- ❑ This is the 7th consecutive season that GPTMC has conducted a survey of hotel visitors. Each of the previous reports, along with other GPTMC research, is available for download at gophila.com/research. This report compares findings from summer 2007 to summer 2006 unless otherwise labeled.

Hotel Visitor Experience



□ Average age and income increased from summer 2006, while new visitors increased and length of stay declined due to the availability of the King Tut package



Respondent Demographics

		Summer 2007	Summer 2006
Average Age		47.5 years	44.6 years
Average Household Income		\$112,848	\$102,626
Race	Caucasian	89%	86%
	African-American	6%	8%
	Asian-American	2%	2%
	Hispanic/Latino	2%	2%
	Other	1%	2%

Trip Characteristics

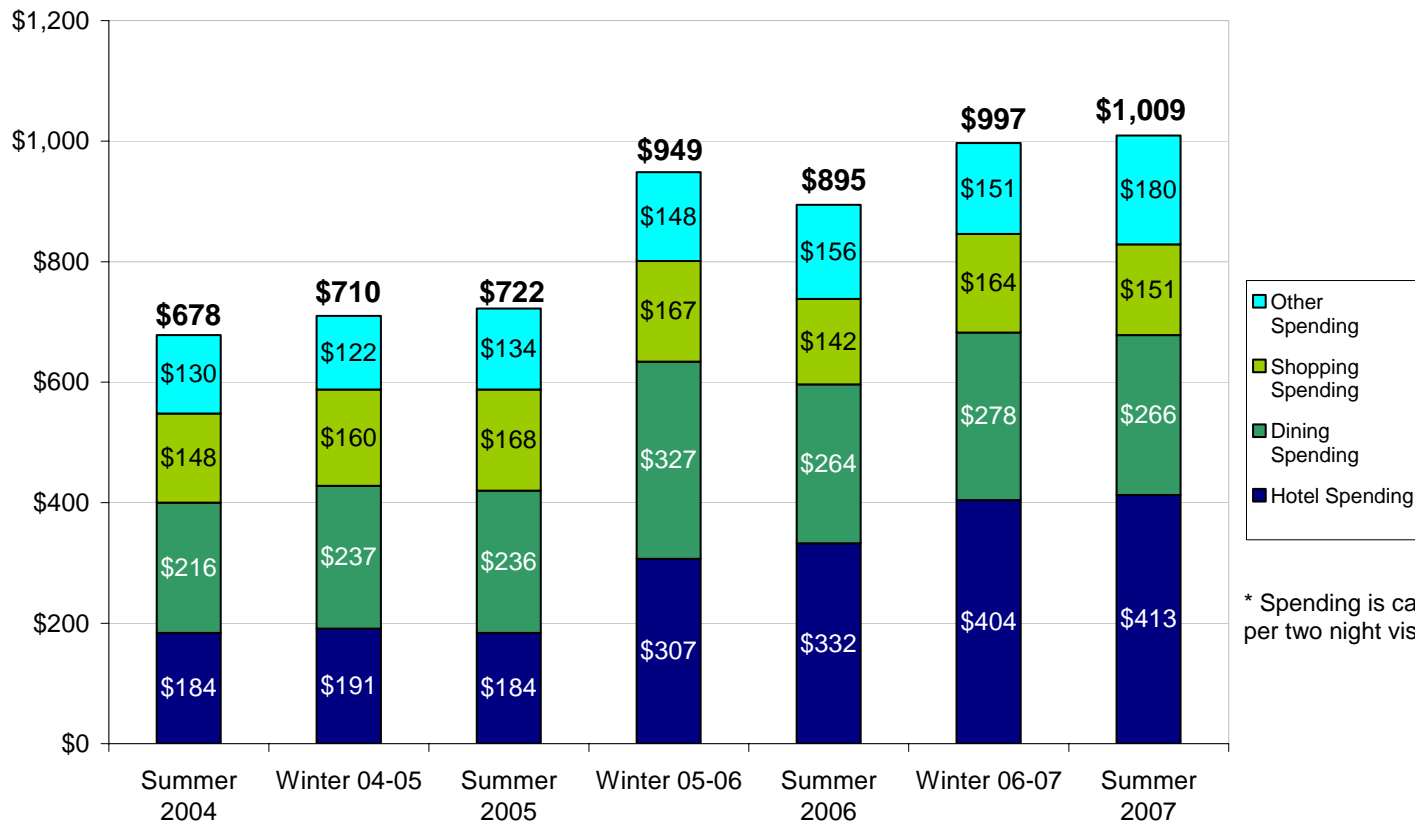
	Summer 2007	Summer 2006
Party Size	2.50 people	2.48 people
Length of Stay	1.74 nights	2.01 nights
One-Time Visitors (past year)	77%	65%
Method of Arrival	82% by car	85% by car
Location of Stay	94% downtown	91% downtown
Only Destination on Trip*	82%	n/a

* Not asked in Summer 2006

□ Average party spending over a two-night stay topped \$1,000 for the first time in summer 2007, with hotel spending continuing to rise



Visitor Spending*

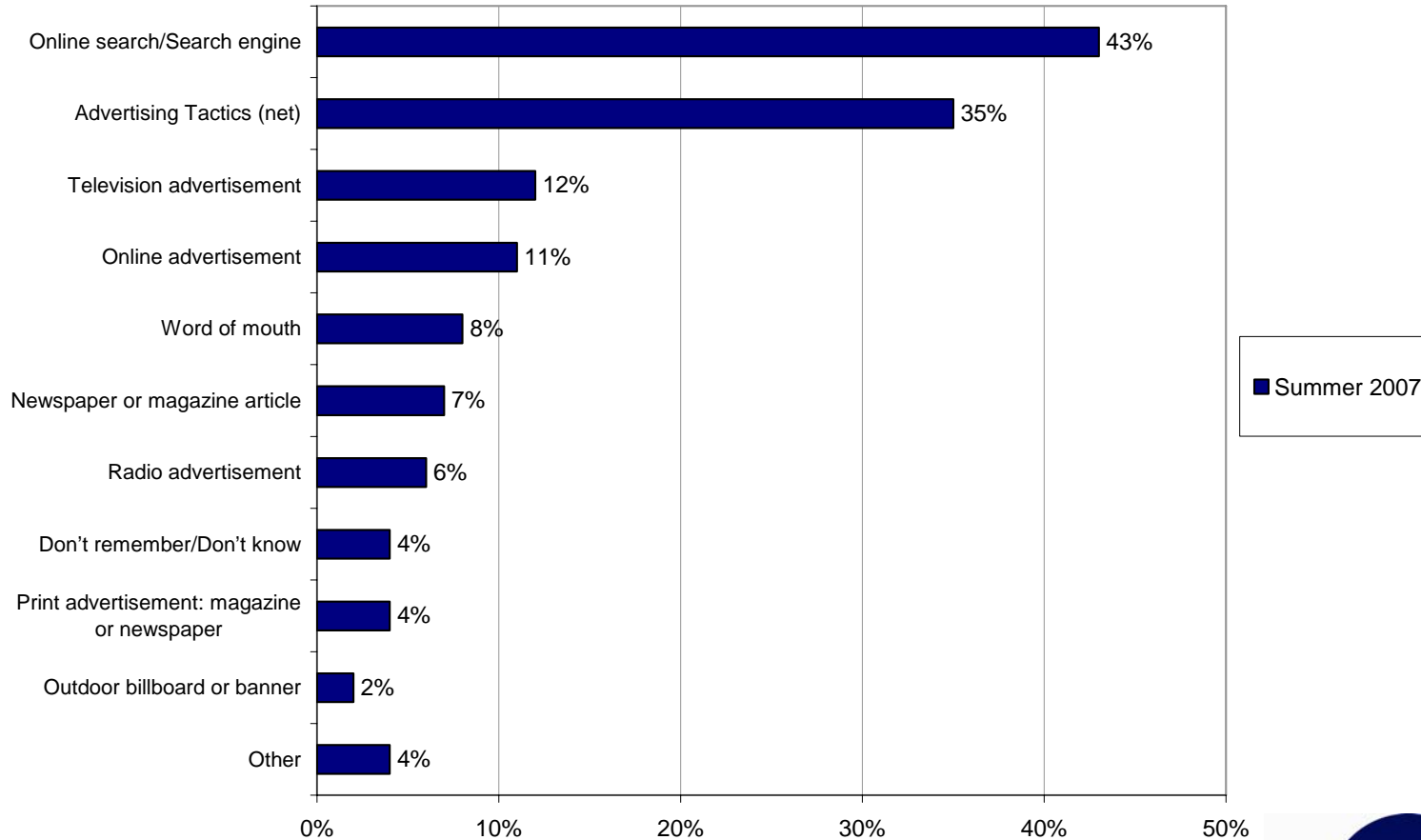


* Spending is calculated per party per two night visit

❑ Search engines and a variety of advertising tactics are the leading methods driving readers to gophila.com



Learning about gophila.com

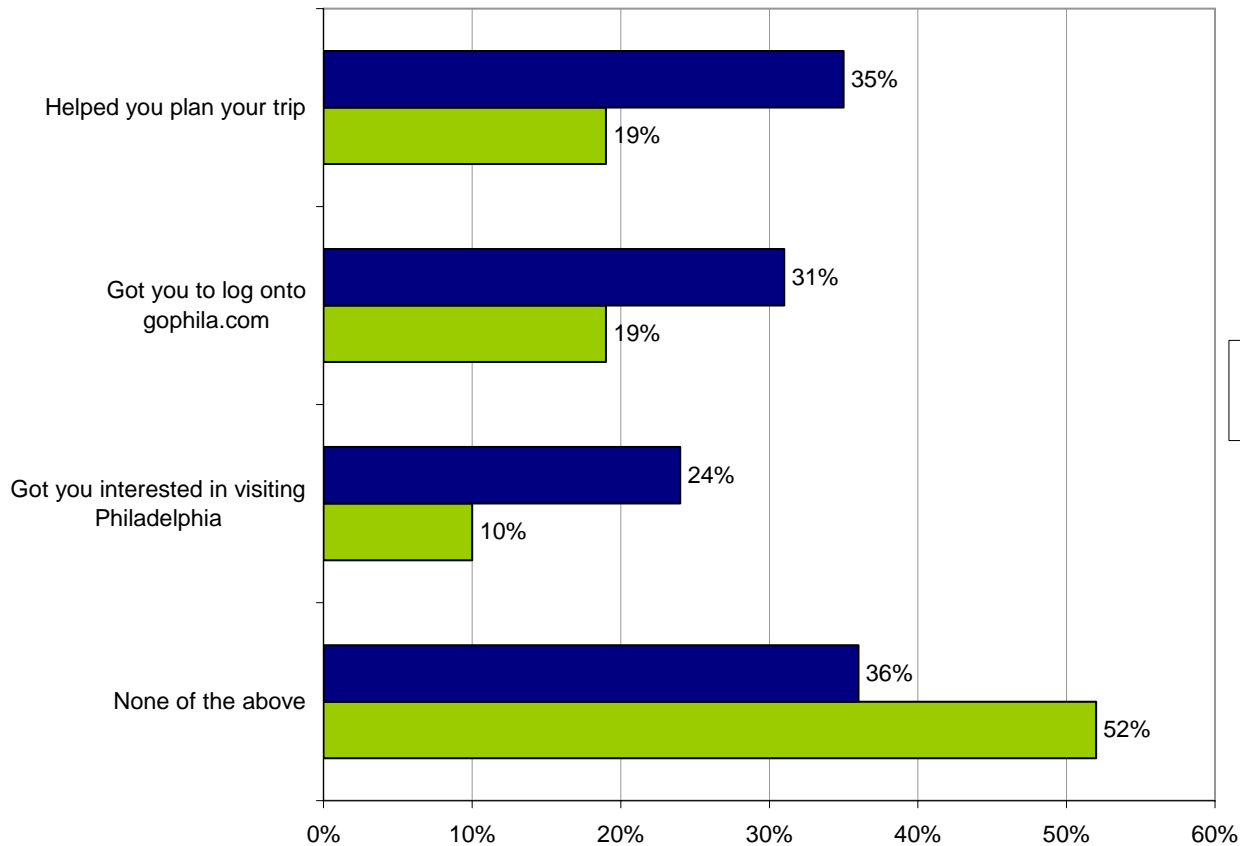


How did you first learn about gophila.com?

❑ An impressive 64% of summer 2007 visitors were inspired by an article to seek more information about visiting Philadelphia



Public Relations Impact*



■ Summer 2007
■ Summer 2006

* In Summer 2006, respondents were asked to choose only one option. Responses in 2007 total more than 100% because multiple answers were accepted.

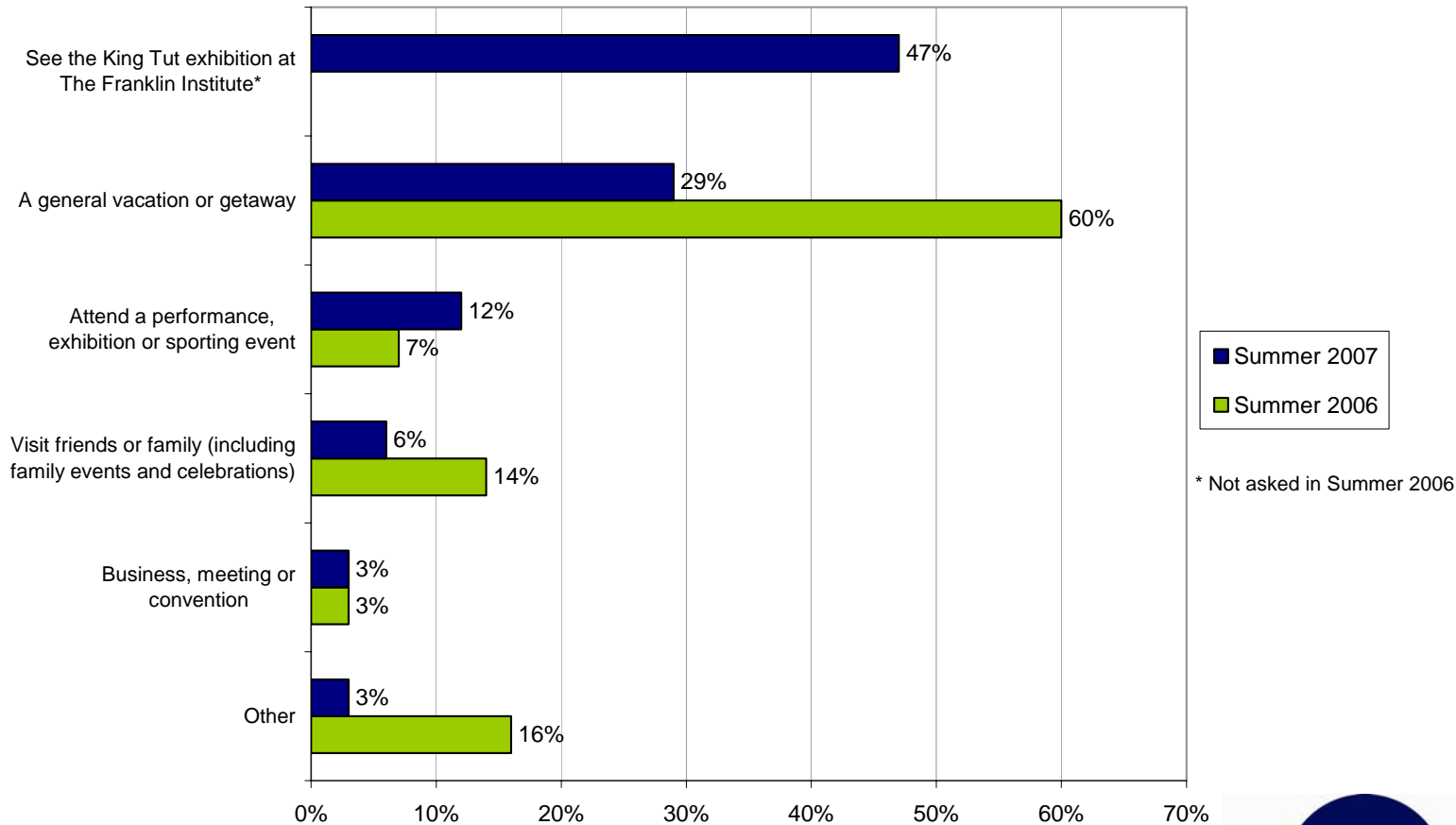
Reading a magazine, newspaper or internet article about Philadelphia ... (Please select all that apply)



❑ The King Tut exhibition was the primary purpose of visit for summer 2007, ahead of the typical leader, general getaways



Purpose of Stay

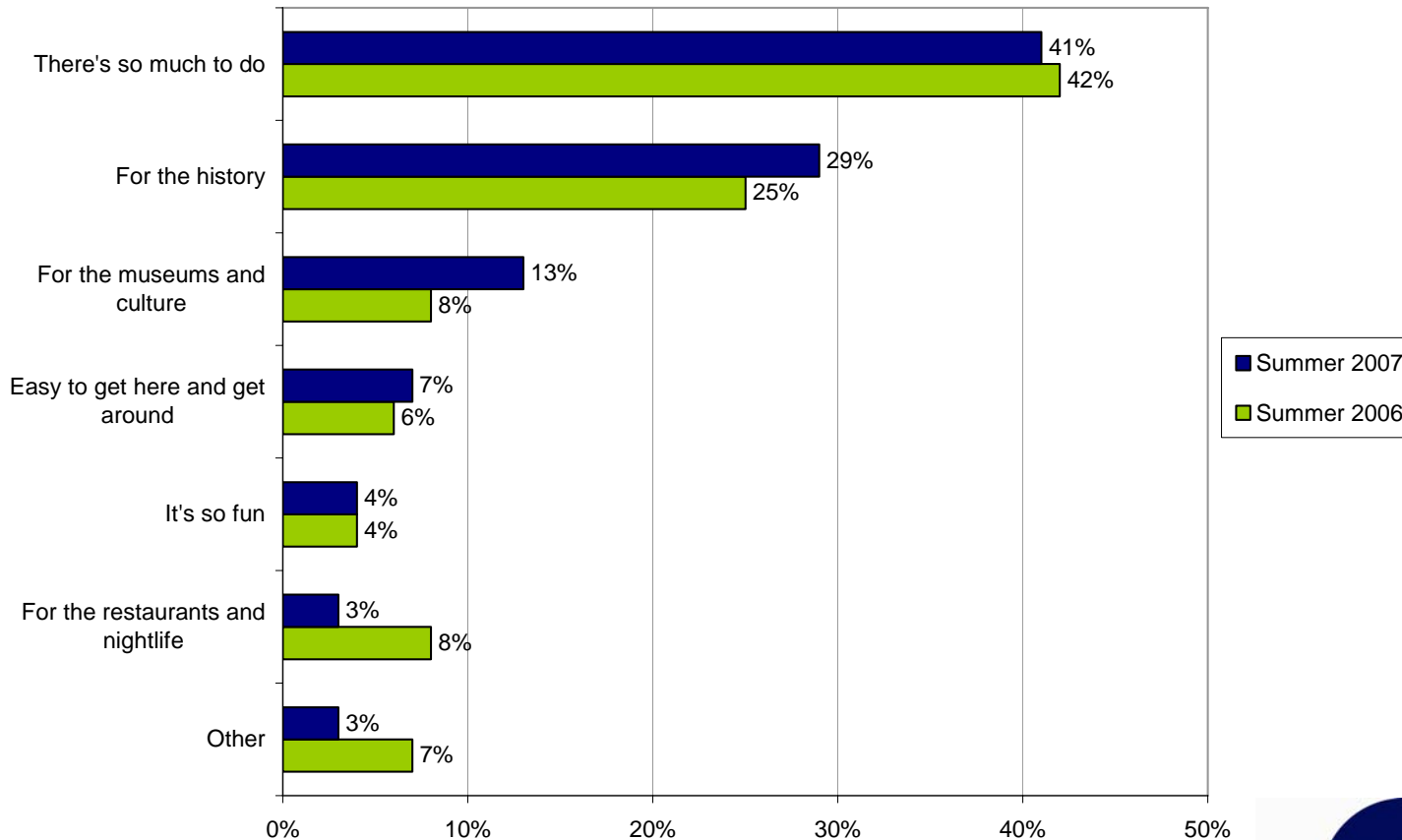


What was the primary purpose of your stay in Philadelphia?

☐ “So much to do” remains the top reason to come to Philadelphia according to our visitors, with history and museums/culture strong choices as well



Reason to Visit

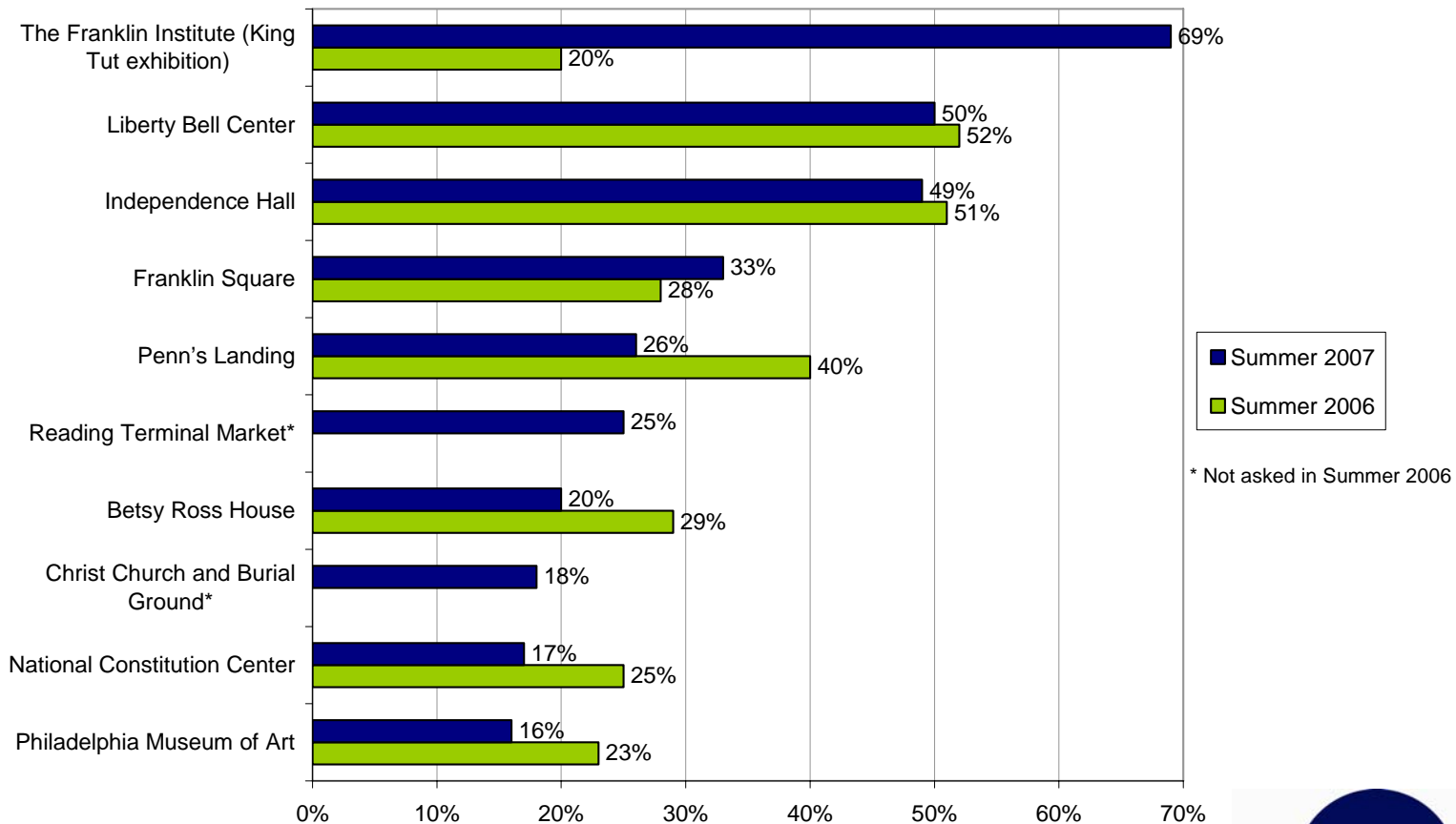


If you could offer people you meet one reason they should visit Philadelphia, what would that reason be?

□ The Franklin Institute was the most visited attraction due to the King Tut exhibit, while the Liberty Bell and Independence Hall continue to be a destination for about half of our summer hotel visitors



Attractions and Museums Visited

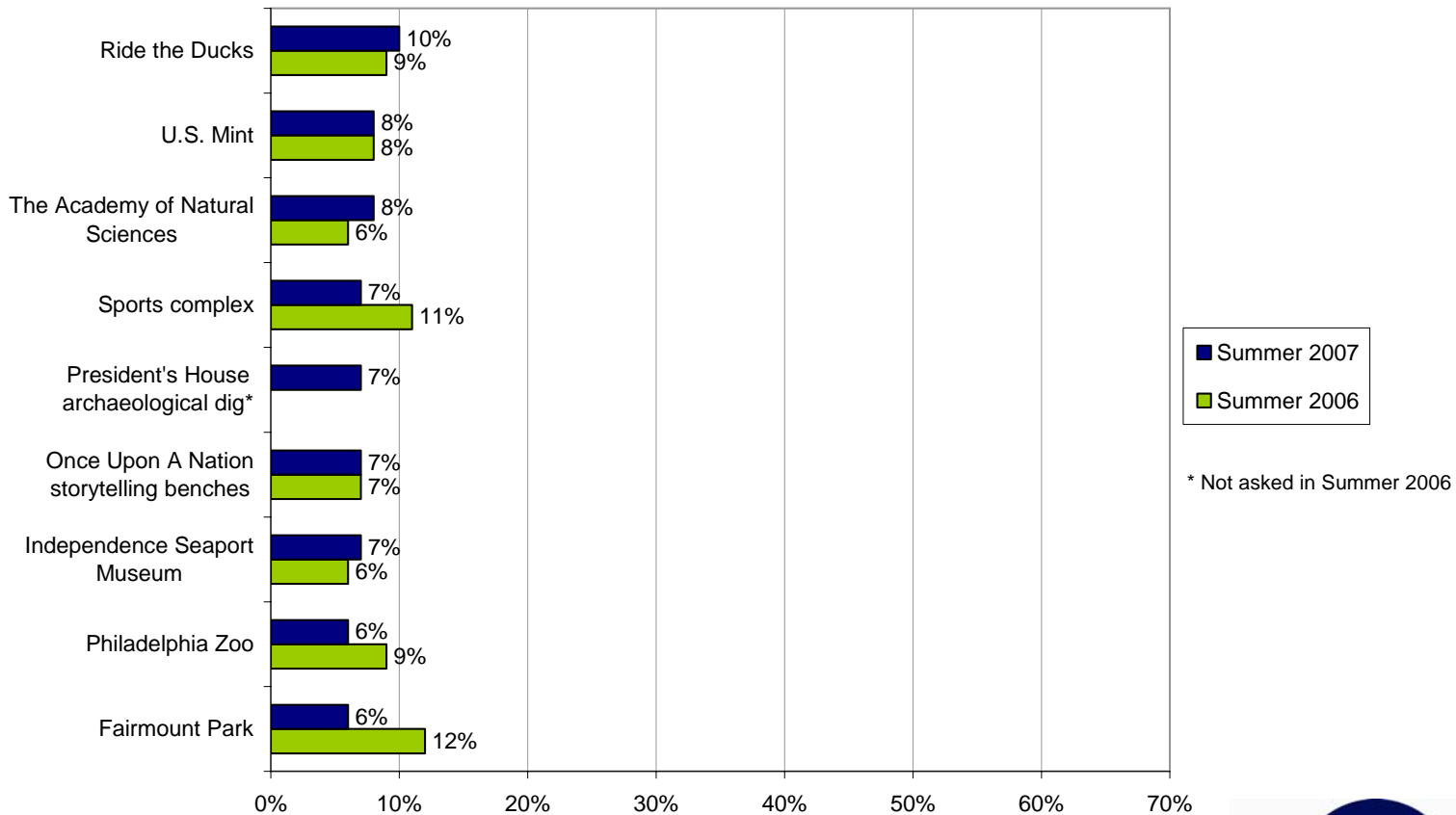


On your most recent trip to Philadelphia, which attractions and museums did you visit?

☐ Philadelphia's historic attractions and tours continue to attract a significant portion of our hotel visitors in the summer



Attractions and Museums Visited (II)

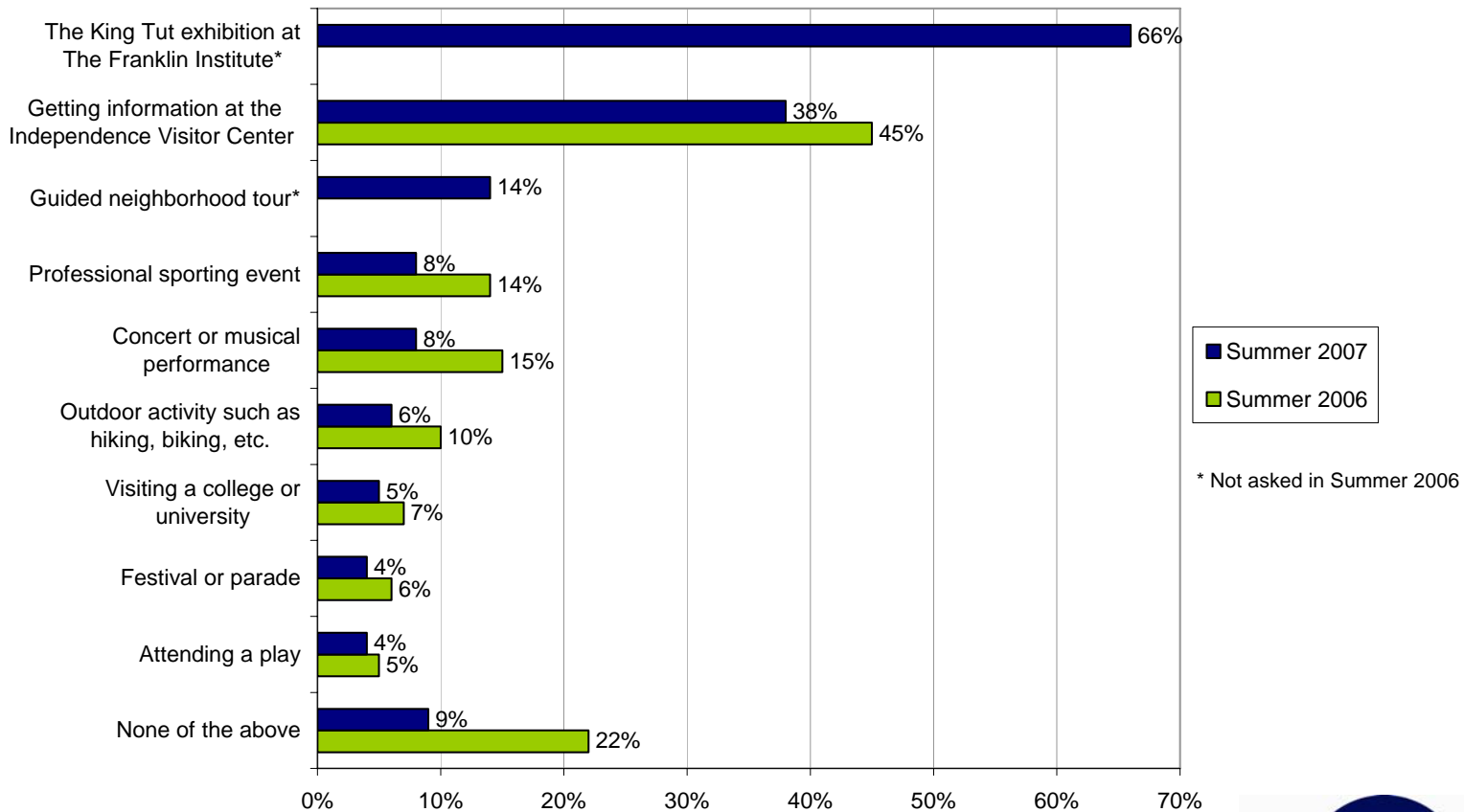


On your most recent trip to Philadelphia, which attractions and museums did you visit?

❑ The overwhelming popularity of the King Tut exhibit diverted some visitors away from “evergreen” activities such as attending sporting events or musical performances



Activities During Stay



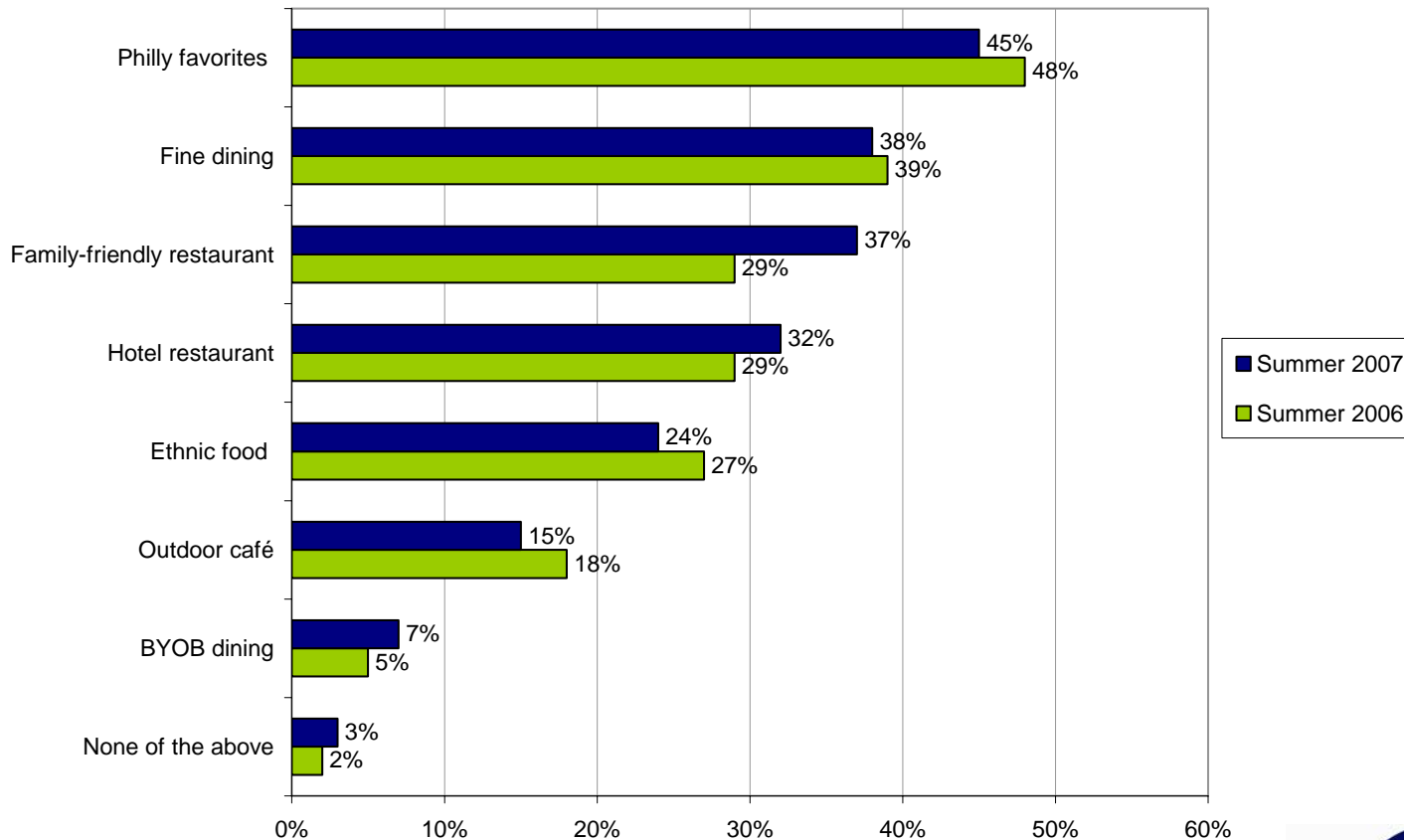
Did you participate in any of the following activities during your hotel stay?



☐ “Philly favorites” and fine dining remained the top summer dining choices, with family-friendly restaurants showing growth from summer 2006



Dining Experiences

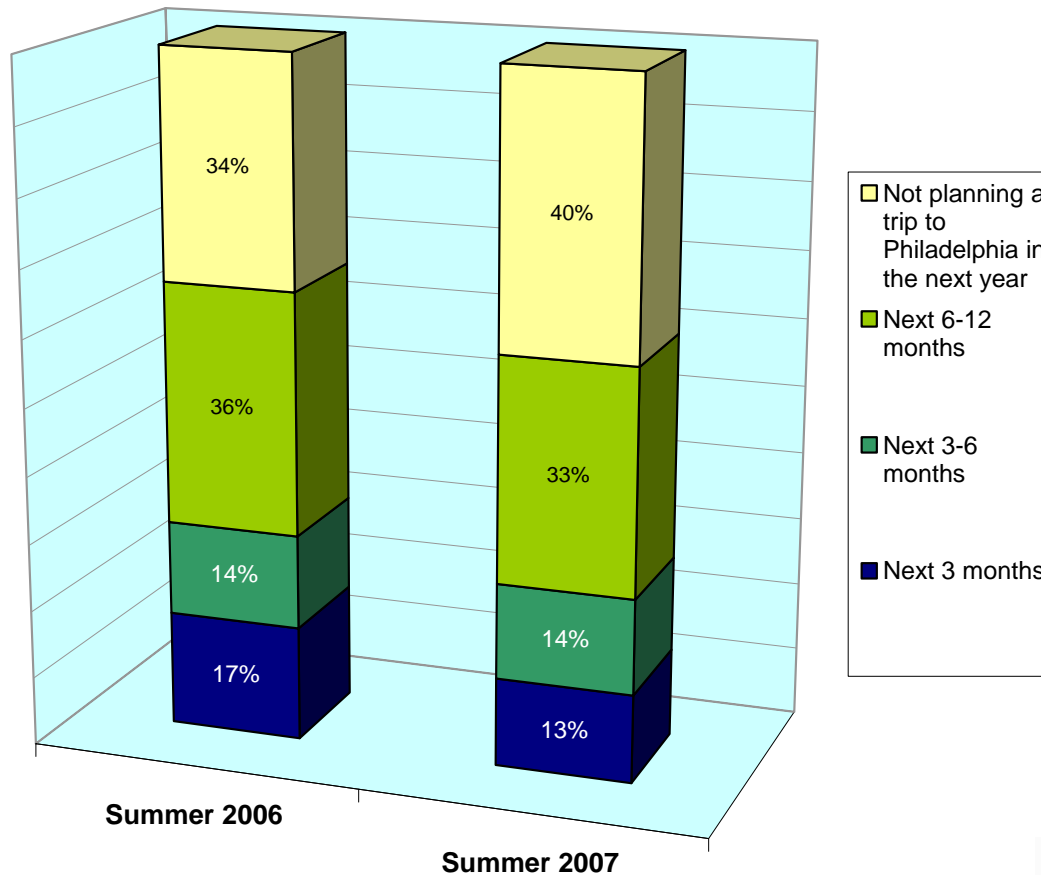


Which dining experiences did you have during your hotel stay?

□ 60% of visitors intend to return to Philadelphia within the next 12 months

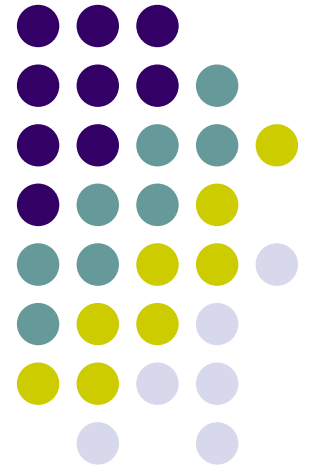


Intent to Return



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

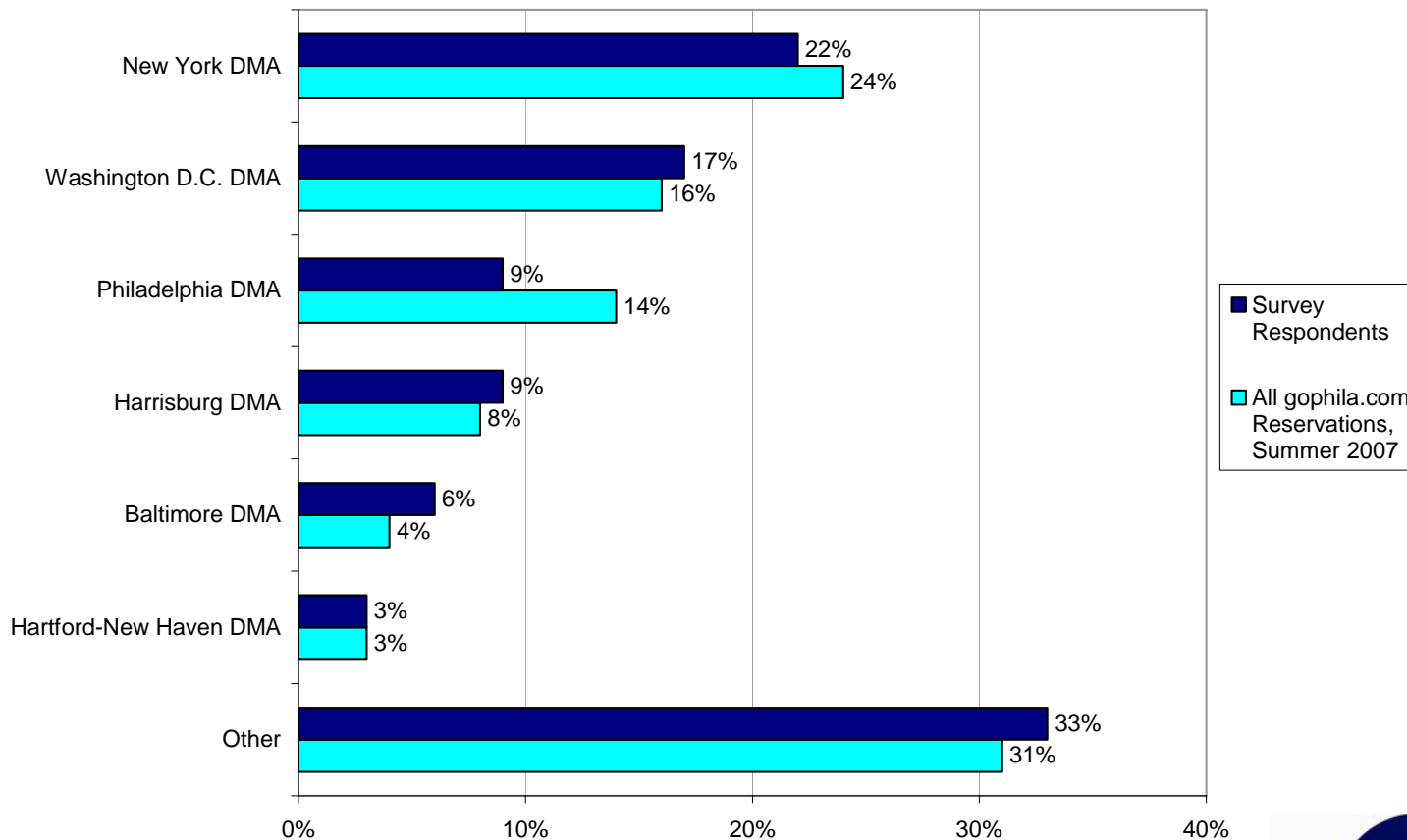
Geographic Breakdown



Zip codes provided by survey respondents matched very closely with zip codes from all reservations made on gophila.com during the Summer 2007 season



Point of Origin



What is your home zip code?

❑ Visitors from outside of the Northeast stayed the longest in Philadelphia, while visitors from Washington, D.C were the wealthiest and the most likely to book the Tut package

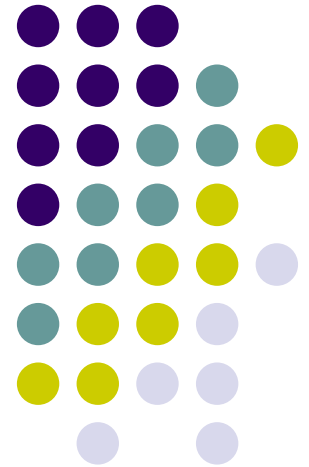


Respondent Demographics and Trip Characteristics by DMA

	Philadelphia DMA	New York DMA	Washington D.C. DMA	Secondary Ad Markets*	Other DMAs
Average Age	45.2 years	47.8 years	46.5 years	47.5 years	48.1 years
Average Household Income	\$101,756	\$112,333	\$134,899	\$105,888	\$108,240
Party Size	2.46 people	2.54 people	2.51 people	2.59 people	2.43 people
Length of Stay	1.54 nights	1.58 nights	1.64 nights	1.56 nights	2.02 nights
% Booking King Tut Package	41%	44%	75%	51%	40%
One Time Visitors (past year)	63%	75%	90%	73%	76%
Method of Arrival	89% by car	85% by car	85% by car	91% by car	72% by car
Location of Stay	100% downtown	95% downtown	94% downtown	95% downtown	93% downtown
Only Destination on Trip	96%	94%	87%	83%	66%

* Baltimore, Harrisburg & Hartford

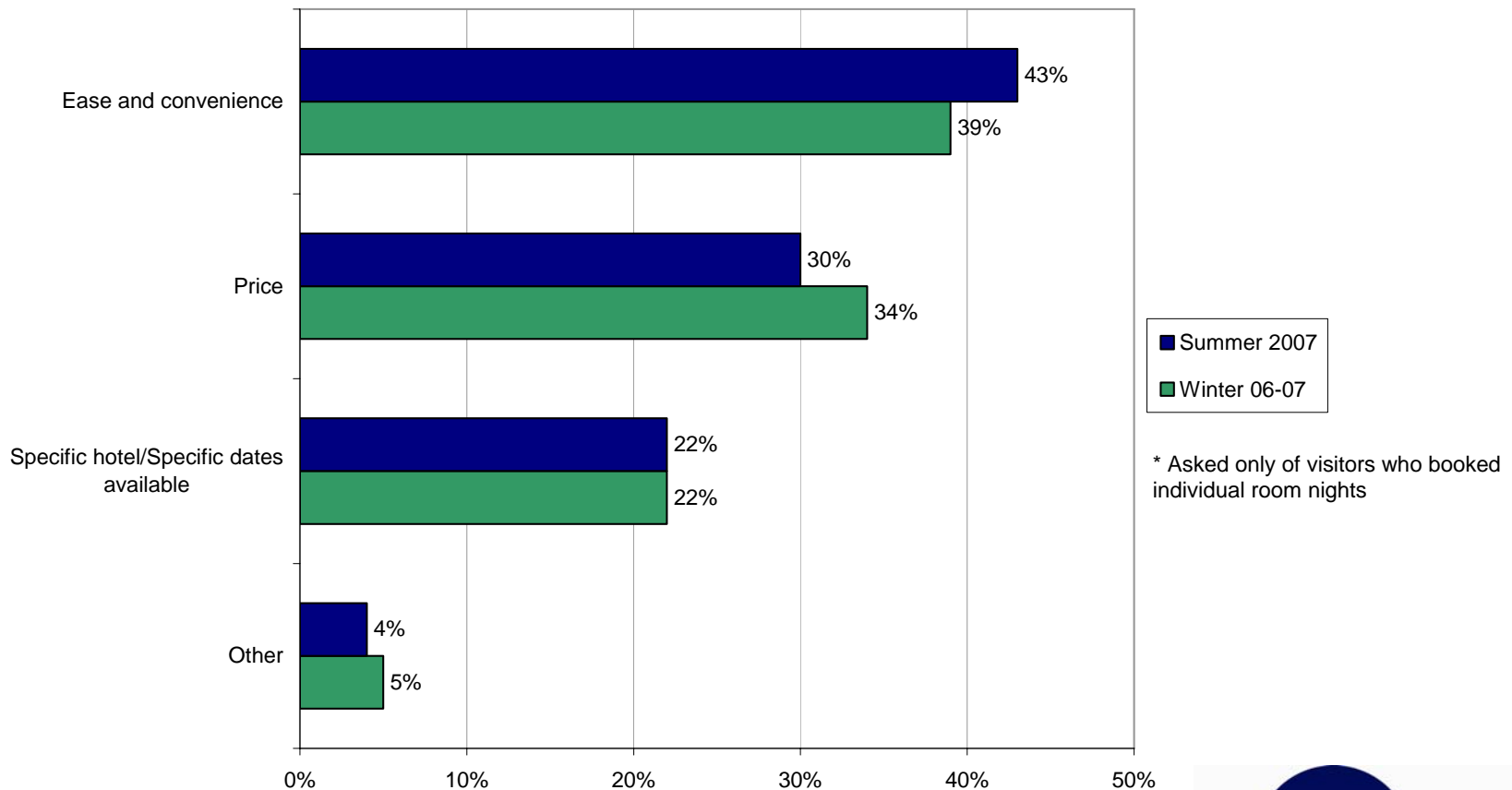
Gophila.com Hotel Offers



❑ Two-thirds of visitors who booked individual room nights told us they comparison shopped before buying. They ultimately chose gophila.com for both convenience and price



Reason to Book on Gophila.com*

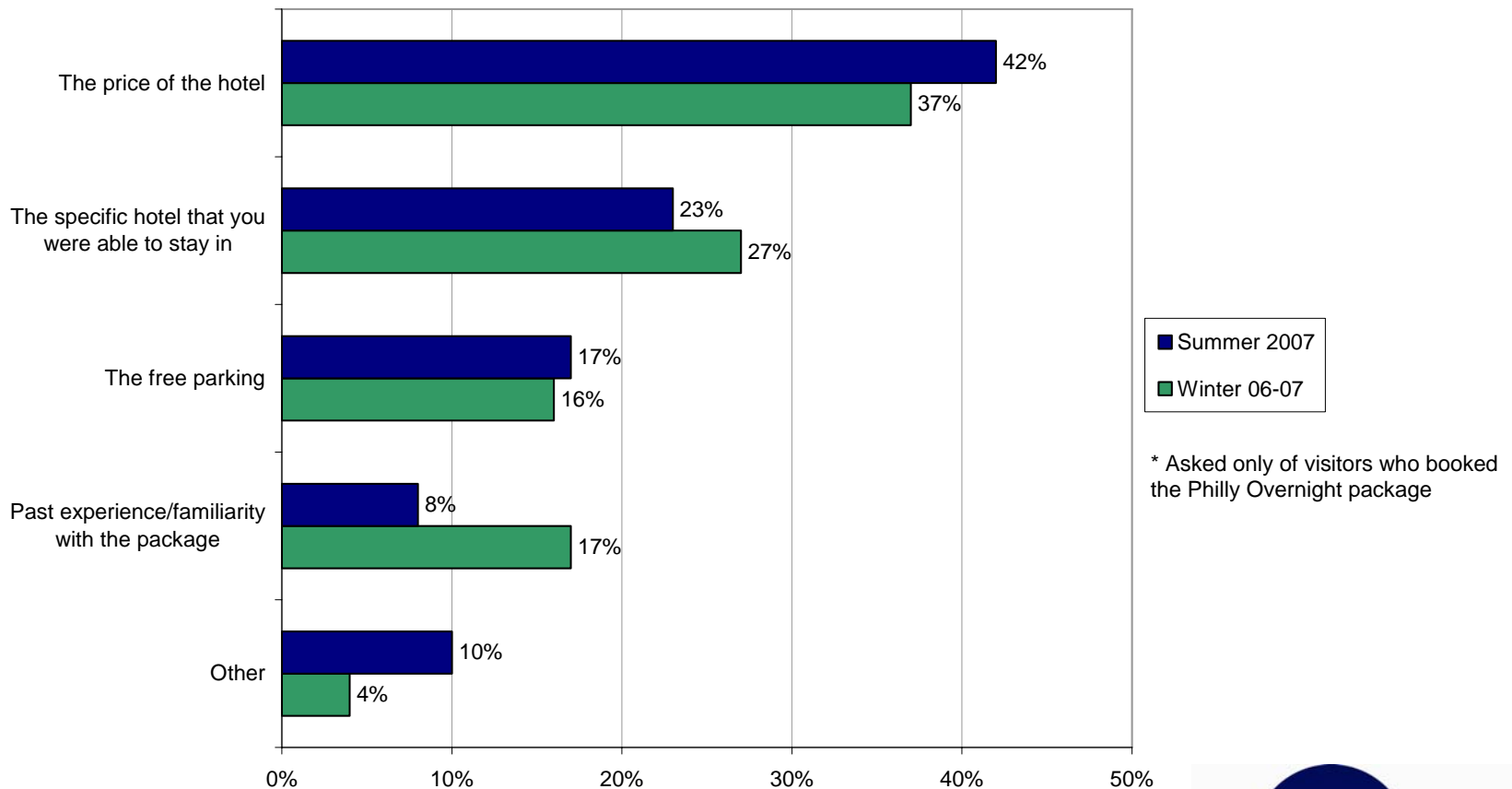


Why did you choose to book on gophila.com?



❑ Among visitors who booked the Philly Overnight Package, price was reported as the primary motivation

Philly Overnight Features*



Please choose the feature of the Philly Overnight Hotel Package that was most attractive to you

□ Visitors booking the King Tut Package, who split evenly between one and two night stays, were older, wealthier and more likely to be one-time visitors to Philadelphia than those who booked another type of stay



Respondent Demographics and Trip Characteristics King Tut Package Visitors

	King Tut Package	Non-Tut Reservations
Average Age	48.7 years	46.2 years
Average Household Income	\$120,719	\$105,623
Party Size	2.41 people	2.59 people
Length of Stay	1.50 nights	1.97 nights
One Time Visitors (past year)	83%	70%
Method of Arrival	86% by car	78% by car
Location of Stay	100% downtown	89% downtown
Only Destination on Trip	85%	78%