

Summer 2009 Hotel Visitors

Report on Survey Findings

December 2009

BACKGROUND

- Survey covers hotel bookings on gophila.com from Memorial Day to Labor Day.
 - 2,081 hotel reservations made on gophila.com for 3,934 room nights and \$550,858 in hotel revenue
 - ADR on gophila.com was \$140 during this time period, the same as the ADR in Center City from June to August

- Hotel rooms sold on gophila.com represent about 2% of 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 e-mailed a survey invitation to all summer hotel visitors who booked their stay through gophila.com
- A total of 1,921 invitations were sent out, with **235 completed** surveys for a response rate of 11.7%.
- As an incentive, respondents were offered the chance to win a \$300 American Express Gift Cheque.
- Percentages in the report are rounded, which may lead to totals above/below 100%.
- This is the **11th consecutive season** that GPTMC has conducted a survey of hotel visitors, with a total historic sample of over 6,000. Each of the previous reports, along with other GPTMC research, is available for download at gophila.com/research. This report compares findings from summer 2008 with summer 2009 unless otherwise labeled.

Visitor Demographics

HOTEL VISITOR DEMOGRAPHICS

- Visitor demographics continue to show that our hotel visitors are middle-aged, but with 5% less annual household income compared to summer 2008.

		Summer 2009	Summer 2008
Average Age		46.9 years	46.3 years
Average Household Income		\$105,801	\$110,804
Gender		62% female	65% female
Race*			
	Caucasian	84%	88%
	African-American	6%	6%
	Asian-American	1%	3%
	Hispanic/Latino	3%	2%
	Other	1%	1%

* 6% in summer 2009 declined to respond

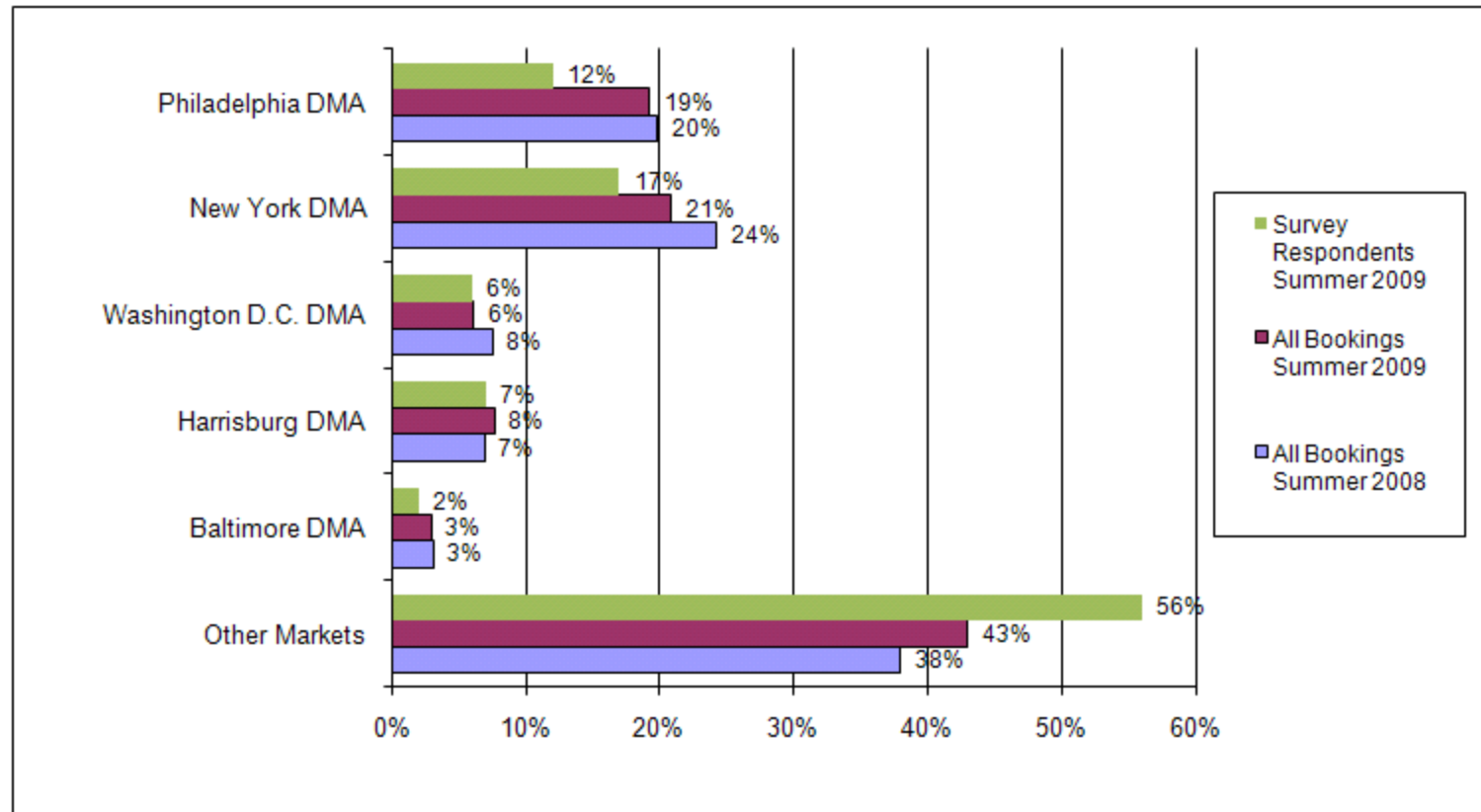
TRIP CHARACTERISTICS

- Summer visitors who book on gophila.com tend to stay two nights, in a travel party of 2.5 and choose to stay in Center City (98%).

		Summer 2009	Summer 2008
Party Size		2.51 people	2.50 people
Length of Stay		2.00 nights	1.94 nights
Repeat Visitors		51%	57%
Location of Hotel Stay		98% downtown	94% downtown
Mode of Arrival			
	Car	82%	82%
	Plane	8%	10%
	Train	9%	5%
	Other	1%	3%

GEOGRAPHY

- Summer 2009 saw more visitors from outside of our typical marketing areas (“other markets”), a reflection of the impact of GPTMC’s national reach: gophila.com, social media, media relations.

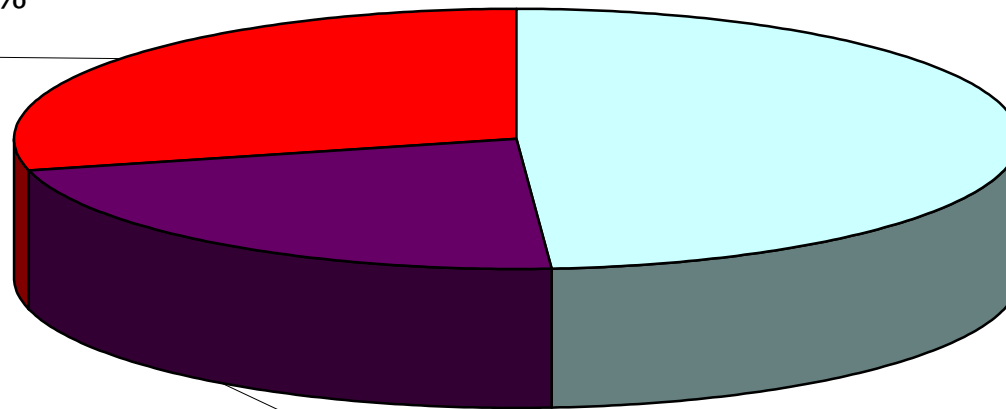


Q: Please tell us your home zip code:

REPEAT VISITORS

- Nearly half of respondents were taking their first trip to Philadelphia, while more than half were repeat visitors (29% many times; 22% one or two times).

No, I have been to Philadelphia many times, 29%



Yes, 49%

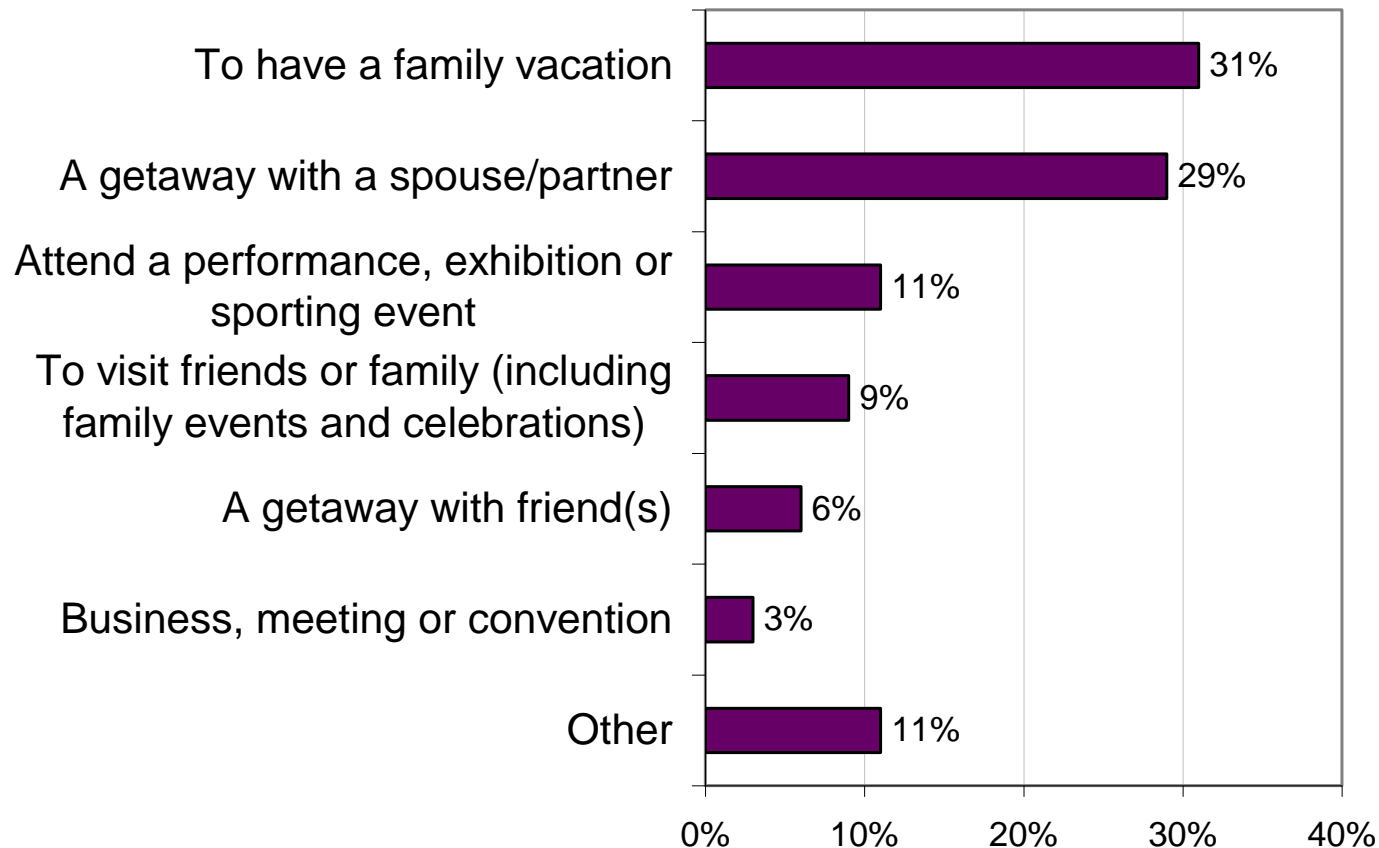
No, I have been to Philadelphia once or twice before, 22%

Q: Was this your first overnight leisure trip to Philadelphia?

Trip Experience

PURPOSE OF VISIT

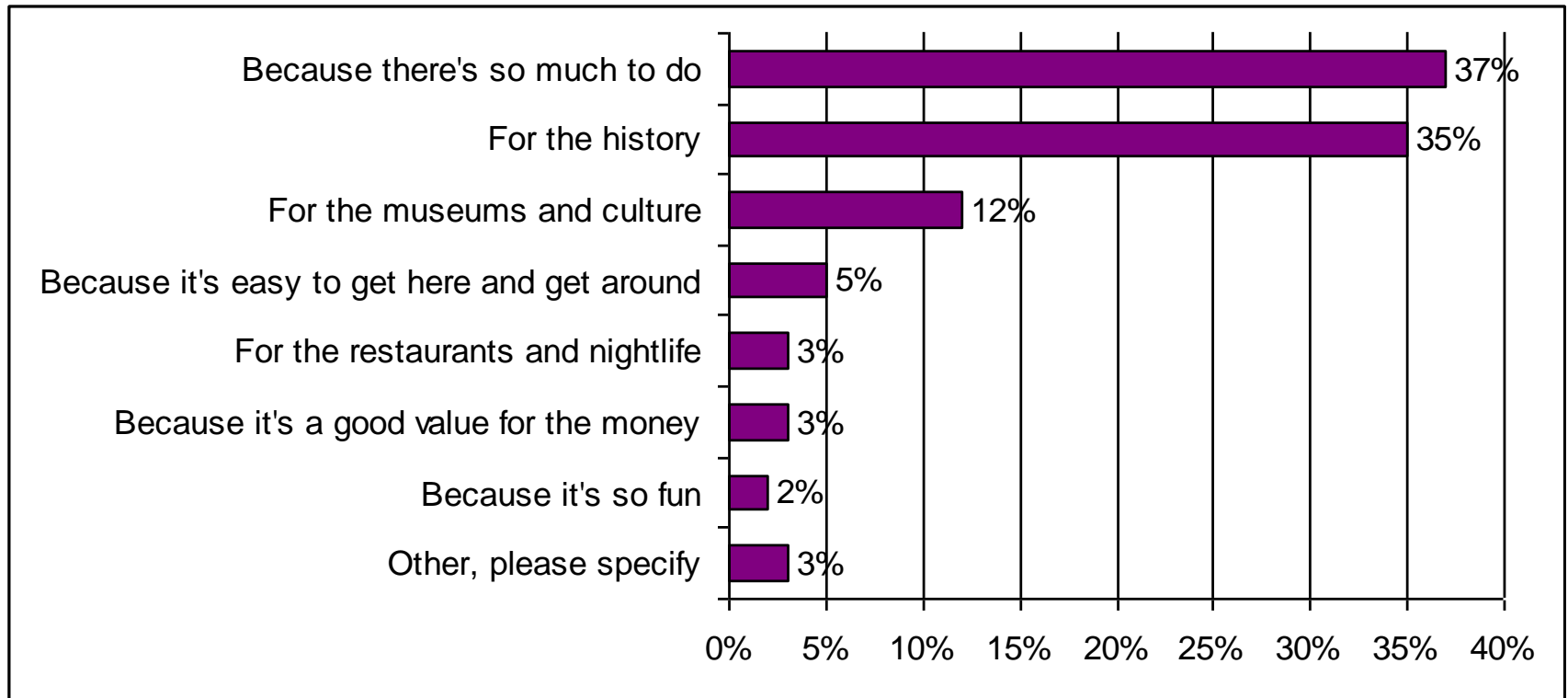
- A family vacation and a getaway with a spouse/partner are the leading reasons for booking a gophila.com hotel stay in Philadelphia.



Q: What was the primary purpose of your stay in Philadelphia?

REASON TO VISIT

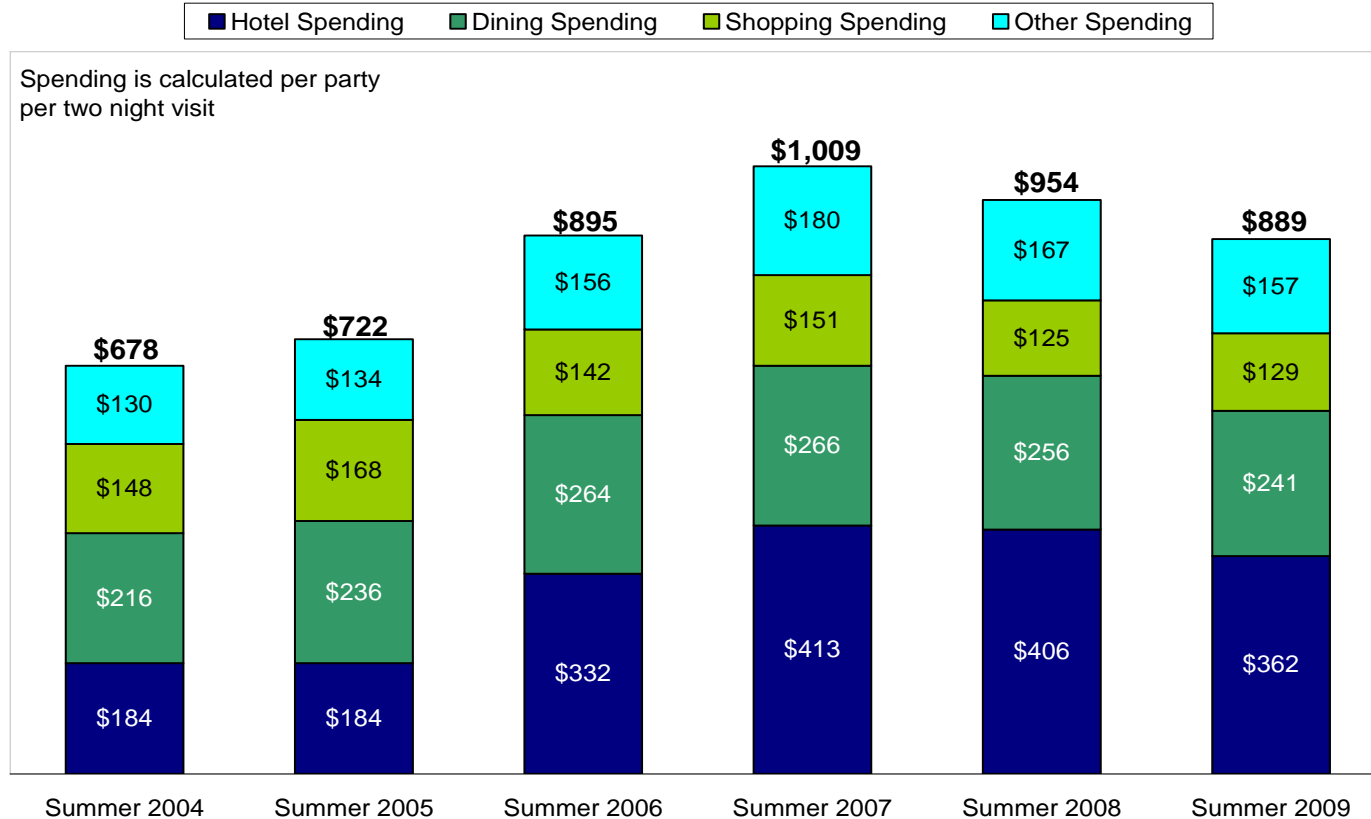
- “Because there’s so much to do” and “For the history” were the top reason respondents offered people for visiting Philadelphia.



VISITOR SPENDING

- Total spending in summer 2009 decreased 7% from summer 2008 and this represents the second summer in a row of spending declines, driven by less spending on accommodations. Hotels remain the largest expenditure for tourists during their stay.

Summer Hotel Visitor Spending 2004-2009

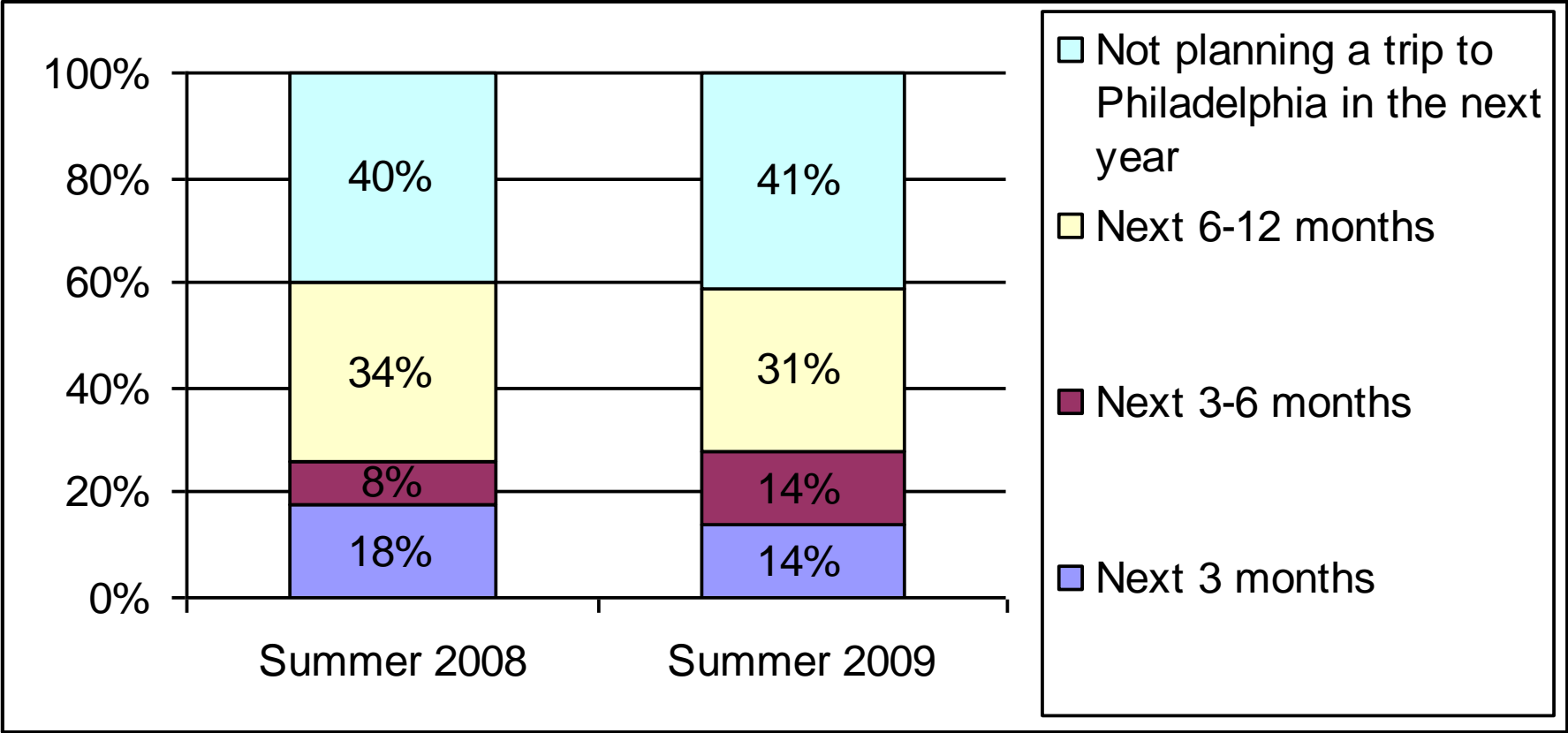


Q: Please estimate for your party the total you spent during this trip in Philadelphia on...

Visitor Satisfaction

INTENT TO RETURN

- 59% of respondents are planning a return trip within the next year, on par with last summer



SATISFACTION INDICATORS

- 90% have **recommended a visit** to Philadelphia to friends and family
- 54% said their trip **exceeded** their expectations while 43% said their trip met their expectations.
- 72% said they were **very satisfied** (72%) and another 26% satisfied with their visit to Philadelphia