

# 2007

## Greater Philadelphia Tourism Monitor: *What's in a Place?*

*Featuring: Understanding the Visitor • Economic Impact • Hotels and the Leisure Traveler  
Marketing that Conveys a Sense of Place • Neighborhoods, Towns and City • Attractions, Exhibitions and Sights*



**Greater Philadelphia Tourism Marketing Corporation**

**BUCKS • CHESTER • DELAWARE • MONTGOMERY • PHILADELPHIA COUNTIES**

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# 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.

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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).

# 2007 GREATER PHILADELPHIA TOURISM MONITOR: WHAT'S IN A PLACE?

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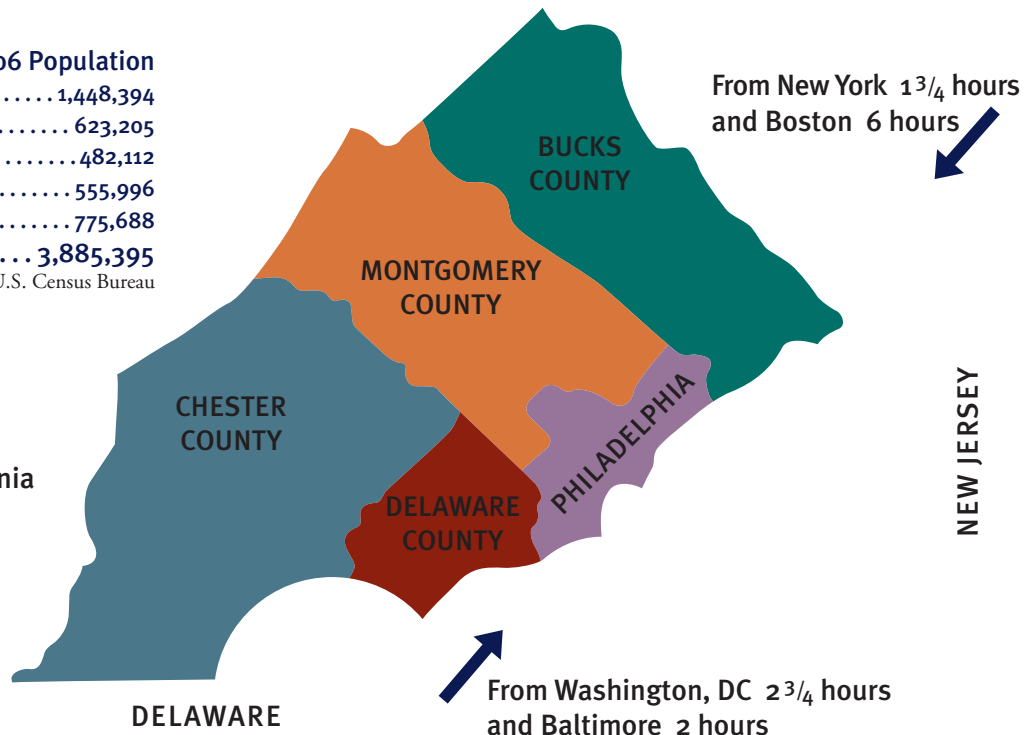
## Greater Philadelphia

### Bucks • Chester • Delaware • Montgomery • Philadelphia Counties

#### Regional Population

County	2006 Population
Philadelphia County.....	1,448,394
Bucks County.....	623,205
Chester County.....	482,112
Delaware County.....	555,996
Montgomery County.....	775,688
<b>Total Five-county Region.....</b>	<b>3,885,395</b>

Source: U.S. Census Bureau



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## 2007 GREATER PHILADELPHIA TOURISM MONITOR: WHAT'S IN A PLACE? EXECUTIVE SUMMARY

### Introduction

What's in a place? What makes a place one that visitors connect to, are motivated to visit and return to again and again? When we market Greater Philadelphia (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) to tourists, should we concentrate on our many attractions, the beauty and warmth of our regional towns, our downtown's ambiance and walkability, the authenticity of our history and neighborhoods or the friendliness of our people?

Of course, our question—What's in a place?—mimics Juliet's famous question "What's in a name?" In Juliet's (and Shakespeare's) case, the context was romantic—she was in love with her Romeo; his name meant only trouble for her.

In the case of Greater Philadelphia, we are fortunate to have a place that inspires love and pride. Our place is special not simply because of its historical significance or its current amenities, but because of the diverse and energetic citizens who have spurred Greater Philadelphia's transformation from a declining industrial city to a thriving modern region. Visitors from outside of our region have taken notice:

- **Domestic overnight leisure tourism increased for the sixth consecutive year in 2006 to 9.3 million visitors.**

Since establishing a research department in 2003, GPTMC has surveyed nearly 10,000 visitors and potential visitors to understand them better. Research is integrated into every marketing program GPTMC develops: We determine the right strategy, messages and audience, and once the program is executed, we measure its effectiveness and make adjustments.

The *Tourism Monitor* demonstrates how research is integrated into GPTMC's marketing efforts by:

- Describing what research was conducted over the past year
- Demonstrating how our key research findings impact our marketing decisions and directions

GPTMC's research also demonstrates the critical role the tourism and hospitality industry plays in promoting the overall vitality of our diverse regional economy.

### How Research Impacts GPTMC's Marketing Efforts

In tourism circles, the question "What's in a place?" is often the starting point for trip conversion. Conversion means turning people into visitors by creating just the right buzz, telling them about just the right activity or attraction or providing them with just the right booking opportunity.

Here are some examples of research insights that have helped us strengthen our trip conversion initiatives:

**1. Research Insight:** Individual leisure hotel travelers are booking rooms all week long and all year round.

- Individual leisure travel accounts for 31% of regional hotel rooms and 25% of Center City hotel rooms (with more than 20% of Center City rooms filled by individual leisure travelers every month of the year).
- 25% of hotel rooms sold on **gophila.com** were booked by visitors who arrived on a weeknight (Monday through Thursday), up from just 12% in 2004.

**Marketing Outcome:** GPTMC's **Philly Overnight® Hotel Package** is now available year round, and travelers are encouraged to make their weekend when they want it.

**2. Research Insight:** **gophila.com** is converting trips to Greater Philadelphia.

- 71% of site users from outside the region report an increased interest in visiting Philadelphia after spending time on the site.

**Marketing Outcome:** GPTMC has increased the focus on **gophila.com** as a marketing vehicle, and the site has seen its highest levels of traffic ever in the summer of 2007 (more than 500,000 visitors a month).

**3. Research Insight:** Feedback in focus groups revealed that GPTMC's general advertising campaign needed to focus more on the destination itself, using engaging images and emphasizing non-stop action rather than sleeping over.

- Visitors to the region cited "so much to do" as the top reason they would give others to come to Philadelphia in both summer 2006 and winter 2007.

**Marketing Outcome:** GPTMC's new **Philly's More** campaign debuted in summer 2007, showing potential visitors the variety of ways that Philly is more fun.<sup>1</sup>

**4. Research Insight:** A number of markets are underexposed to the **Philly's More** message, given their propensity to travel and their fit with our offerings.

**Marketing Outcome:** GPTMC introduced Washington, DC as a media market for the winter 2006-2007 campaign and added Hartford/New Haven for summer 2007.

## Section by Section

The report is organized into six sections, each allowing us to investigate and report on a significant aspect of the place we call home and the place so many millions call a great destination.

**I. Understanding the Visitor:** Our focus group research has demonstrated that people are looking for "a place to fall in love with." Falling in love with a place is like falling in love with a person: You want to feel as if you have discovered something, you want to feel comfortable and at home ("loved back") and you want your heart to beat a little faster while you are there. What we learn about our visitors through focus groups and surveys helps us guide visitors to and through a destination they can fall in love with.

- **Focus Groups:** GPTMC conducted 13 focus groups in five urban markets<sup>2</sup> in the fall of 2006. These groups (described in detail in the Understanding the Visitor section of this report) allowed us to probe visitors on why they travel and what they think about our destination. The insight we gained helps us craft the messages we use to entice visitors to the region. In addition, we continue to conduct focus groups with visitors to the region each season to hear about why they came and how their visits went.
- **Surveys:** GPTMC is constantly checking in with our visitors to learn what they enjoy about their visits to the region and what could be done to bring more people here. Over the past year, we have surveyed hotel visitors, visitors to **gophila.com**, visitors to **Historic Philadelphia** and many others, with an eye toward gaining specific insights that will help us craft our newest marketing efforts.

**II. Economic Impact:** Tourism is an economic engine that has made Greater Philadelphia a better place to visit and to live. Tourists are here every day of the week and go to our restaurants, shop in our stores and take in our sights. They keep our downtown open later, fill our museums during the week when many of us are at work and invigorate our hotel and restaurant industry all year long. The result has been an economic sea-change for Greater Philadelphia that translates into both a quality-of-life change for residents and an improved visitor experience.

- In 2006, travelers to our region generated **\$10.44 billion** in spending impact. That means **\$28.5 million per day** circulated throughout our region because of tourism.

<sup>1</sup> To see the **Philly's More** TV commercial, visit [gophila.com/phillysmore](http://gophila.com/phillysmore).

<sup>2</sup> New York, NY; Bethesda, MD; Boston, MA; Chicago, IL; Atlanta, GA.



- The tourism industry supported **128,524 jobs** in the five-county region in 2006.
- Tourists and locals benefit from one another: Restaurants and attractions that are local favorites have grown to meet tourist demand. And tourists benefit from the energy and enthusiasm that residents imbue in the region.

**III. Hotels and the Leisure Traveler:** Because of the centrality of the hotel industry in serving tourists and in generating economic returns, GPTMC devotes a significant portion of its research program to understanding and tracking the hotel industry in the region.

- In late 2004, GPTMC, the Philadelphia Convention and Visitors Bureau (PCVB) and the Greater Philadelphia Hotel Association (GPHA) got together to jointly sponsor a monthly *Philadelphia-area Hospitality Industry Snapshot*, produced by PKF Consulting. This partnership among different segments of the hospitality industry enables PKF to draw on and analyze robust data to produce a monthly hospitality barometer that goes well beyond what is available for many other metropolitan regions.
- Over the past several years, GPTMC has surveyed thousands of hotel visitors. Since 2004, more than 3,800 visitors who have booked a hotel room on **gophila.com** have been surveyed, and each new group gives us a fuller picture of what visitors love, how their trips differ depending on the time of year and their familiarity with the city and how we are reaching them with our marketing efforts. In addition, thanks to the generosity of our hotel partners, GPTMC was able for the first time to interview visitors directly in the lobby of hotels in the summer of 2007. This research provides a valuable window on the activities and perceptions of both leisure and business travelers in Philadelphia.

Greater Philadelphia hotels are investing \$220 million in hotel upgrades this coming year, according to a survey conducted by GPHA. This increased investment is fueled by strong occupancy, rising hotel rates and a healthy market mix of travelers in the region:

**Key Hospitality Measures, 2006**

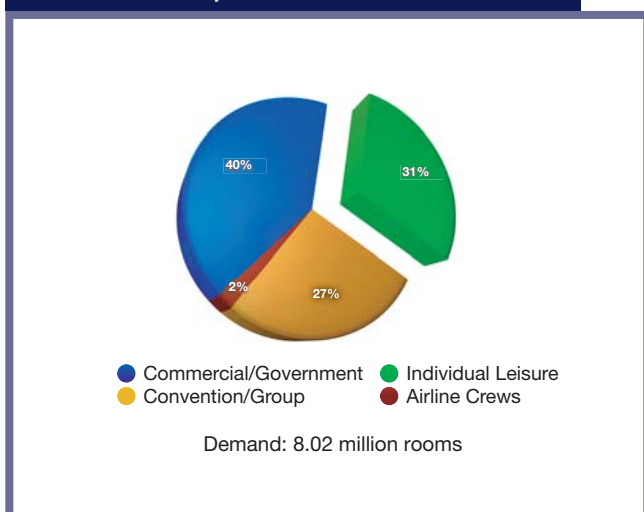
	Greater Philadelphia	Philadelphia County	Center City
Hotel Occupancy	70.5%	73.5%	73.6%
Average Daily Rate	\$121.05	\$143.68	\$156.34
Hotel Demand	8,024,398	3,798,412	2,715,329

Source: Smith Travel Research

This healthy hotel environment is being sustained, in large part, by leisure travelers to the region:

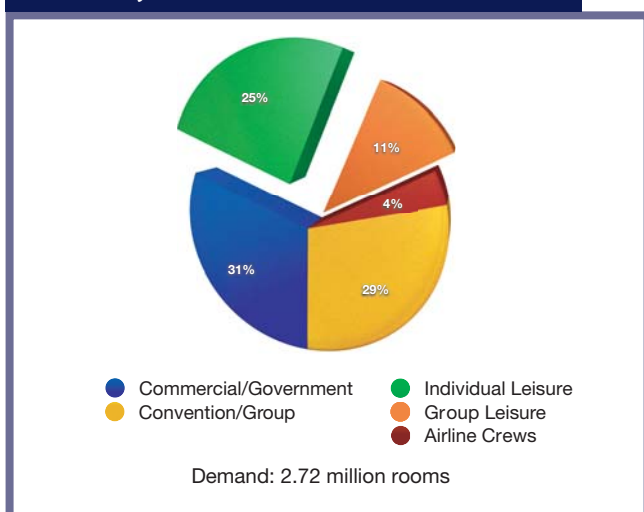
- Individual leisure travelers fill 31% of regional hotel rooms. (Source: PKF Consulting)
- Individual leisure travelers occupy 25% of Center City hotel rooms. (Source: PKF Consulting)
- Group travelers here for a leisure purpose, such as a wedding or family reunion, occupy an additional 11% of Center City rooms. Together, these two leisure segments make up 36% of all Center City room nights. (Source: PKF Consulting)
- Rates on the weekends—when most leisure travelers visit—have gone up substantially more than weekday rates. (Source: Smith Travel Research)
- Leisure visitors are now a critical part of seven-days-a-week, 365-days-a-year occupancy.

#### Greater Philadelphia Hotel Market Mix, 2006



Source: PKF Consulting

#### Center City Hotel Market Mix, 2006



Source: PKF Consulting

#### IV. Marketing that Conveys a Sense of Place:

GPTMC’s marketing aims to convey an experience of place that motivates travelers to visit. Research conducted over the past year helps us to connect the dots between the destination’s assets, its image and our visitors. The result is a finer understanding of how to use the marketing tools we have to engage visitors, motivate them to visit and provide them with the resources they need to plan and book their trip. In this section, we report on how research has been used to refine the objectives and increase the impact of each of these marketing tools.

#### V. Neighborhoods, Towns and City: Greater Philadelphia is not just one place, it is many places.

A trip to our region can focus on a single neighborhood, a number of neighborhoods or even the theme of “neighborhoods.” Our regional towns, ranging from quaint and historic New Hope in Bucks County to revitalized and artsy Media in Delaware County, have distinctive Main Streets and beautiful landscapes. The city and many of the towns that surround it can be centers of culture, history, shopping, or wandering and exploration.

Linking the experiences of our regional place is all the more important because GPTMC surveys on **gophila.com** have shown that half of our visitors plan to incorporate both city and suburban experiences into their trip plans.

GPTMC has developed three new campaigns that create a sense of place by linking neighborhood experiences:

- **uwishunu™ (You Wish You Knew):** An insider approach to the city
- **Historic Philadelphia:** Connecting the dots of our most historic neighborhoods and sights to create a total experience for visitors
- **Boundless Philadelphia™:** Promoting the region’s outdoor assets and experiences to position Greater Philadelphia as a place to enjoy the outdoors

**VI. Attractions, Exhibitions and Sights:** Exhibitions and attractions define a place for many tourists who wouldn’t come here otherwise.

- In a recent GPTMC survey, 60% of people who bought a **King Tut Hotel Package** on **gophila.com** reported that they would not have visited Philadelphia if it were not for the special exhibition.
- Visitors who come to Greater Philadelphia only once in a year are twice as likely to go to the Liberty Bell Center as those who visit more frequently.



- Each year millions of people visit our premier cultural attractions such as the Philadelphia Museum of Art, The Franklin Institute and the Philadelphia Zoo.

While major attractions bring visitors in, it is our place that keeps them coming back. During the Philadelphia Museum of Art's blockbuster *Salvador Dali* exhibition, visitors who came just for the show also made 52,000 visits to other cultural and historic attractions. They discovered Greater Philadelphia as a place because they were here for an exhibition.

For the *Tutankhamun and the Golden Age of the Pharaohs* exhibition on view at The Franklin Institute through most of 2007, GPTMC developed the "Go Golden" program in order to extend visitors' experiences to the entire region. The results will be forthcoming in a report issued by The Franklin Institute and GPTMC in late 2007.

## Strategic Plan

2006 marked GPTMC's 10<sup>th</sup> anniversary and the end date of our last five-year strategic plan. Over the past year, we worked on a new strategic plan to bring us into our second decade. The plan reviews how GPTMC works to meet its goals and envisions a future for marketing Greater Philadelphia that builds on our recent landmarks:

- A 63% increase in overnight leisure tourism from 1997 to 2006
- Growing buzz about Greater Philadelphia as a destination
- Expanded tourist attractions and amenities available throughout the Philadelphia region

The strategic plan includes four primary elements, each with implications for research:

1. The plan **reaffirms our mission**: GPTMC makes the Philadelphia region a premier destination through marketing and image building that increases business and promotes the region's vitality.
2. The plan **articulates GPTMC's organizational values**, our "way of doing business": GPTMC is an entrepreneurial, professional, collaborative and customer-focused organization with a can-do attitude.
3. The plan **identifies the components of the Philadelphia brand**:
  - Accessibility
  - Authenticity
  - Discovery
  - Fun
  - History
4. The plan **identifies the top 10 strategic issues** that GPTMC should address in the coming years and divides those issues into three categories:
  - Marketing new attractions and the new Philadelphia as it grows
  - Staying ahead of the curve in using technology and communication vehicles to reach consumers effectively
  - Sustaining investment in marketing Philadelphia and The Countryside® in order to continue to generate strong economic returns from tourism

In addition, the plan sets forth an overarching commitment to identify the Philadelphia brand with the concept of independence. This vision applies both to tourism, where we offer visitors an authentic and compelling experience, and within the region, where it reflects both our dynamic and entrepreneurial business community and the authentic style and attitude of our residents. This focus on independence is further cemented by GPTMC's status as a founding partner of **Forever Independent**, a common mark now used by 16 tourism, hospitality, business and cultural organizations to represent the region and serve as a unifying theme for communications.



## So, What's in our Place?

The question “What’s in a place?” is a natural one to follow our previous *Tourism Monitors*:

- 2004: *Making the Case for Investing in Tourism Marketing*
- 2005: *The Changing Landscape of Tourism Marketing*
- 2006: *Branding Builds Business*

All of these issues continue to shape our marketing approach, and all three reports are available at [gophila.com/research](http://gophila.com/research).

The current report covers the research from the past year through a new lens:

*What is it about our place—Greater Philadelphia—that drives a visit? What do people know, expect and want when they make their choice to come, and—the marketer’s question—how can we get more of them to make the trip, stay longer and come back?*

Greater Philadelphia’s identity as a place is dynamic, not static, and the past decade has seen a redefinition of how regional residents and visitors alike see our region. Our *Tourism Timeline*, found at [gophila.com/research](http://gophila.com/research), outlines the growth of Greater Philadelphia as a destination and the revitalization of the region generally.

Philadelphia has undergone what Basil J. Whiting, author of *Philadelphia 2007: Prospects and Challenges*,<sup>3</sup> sponsored by The Pew Charitable Trusts, identifies as a “transformation of the civic leadership climate” in the past decade. The hospitality industry is at the forefront of this transition, which has put an end to Philadelphia’s “post-industrial” decline and transformed it into a modern, diverse and exciting region.

However, much work is still to be done. When GPTMC traveled to Chicago and Atlanta in the fall of 2006 and talked to visitors outside the reach of our advertising, we found that Philadelphia’s industrial image, an identity informed by the *Rocky* film franchise, our justifiably famous cheesesteaks and our passionate sports fans still prevails for many potential visitors. Continuing to tell the story of the new Philadelphia through all of GPTMC’s marketing vehicles is an essential part of building upon the success of the tourism industry, reaffirming the importance of continued investment in tourism marketing because of its effectiveness in increasing the quality of life in Greater Philadelphia.

<sup>3</sup>*Philadelphia 2007: Prospects and Challenges*. Basil J. Whiting with Tony Proscio. The Pew Charitable Trusts, 2007.

## I. UNDERSTANDING THE VISITOR

“Every city has history, but I think Philly has much more.”  
- GPTMC focus group participant

Place is not taken for granted at GPTMC. Actually, we spend most of our time thinking about it: how best to represent it; how to make it enticing; what to tell our visitors so they will have a successful experience in it.

We start with consumer insight, which helps us make the connection between visitor and place. GPTMC conducts surveys, focus groups and one-on-one interviews all year long to learn more about our visitors, potential visitors and even those who have chosen to go somewhere else (to see what we can do to induce a visit next time).

We begin with the basics—how many people visit and where they come from—and then drill down to analyze specific visitor segments. Once we have established our baseline facts, we explore more about our visitors to determine the best way to engage them and what to tell them about Greater Philadelphia.

- **Visitor Segments:** First, we take a look at what our universe of travelers is: how many there are; the purpose of their visit (business, leisure, day-trip, overnight stay, combined business-leisure trip, etc.); and where they are coming from.
- **Grounds for Engagement:** GPTMC engages visitors to learn about their trip experiences and find out what makes them fall in love with a place. This year, our grounds for engagement include findings from 13 focus groups that GPTMC conducted in five cities in the fall of 2006.

We take these insights, put them together with our best and most creative tools for representing a sense of place (see Marketing that Conveys a Sense of Place on page 24) and then track their impact on how many people visit.



For a summary of Greater Philadelphia’s top tourism facts, download volume IV of *Facts at Your Fingertips* at [gophila.com/research](http://gophila.com/research).

## Visitor Segments

Greater Philadelphia is fortunate to attract large numbers of business and leisure travelers, day-trippers and overnight visitors:

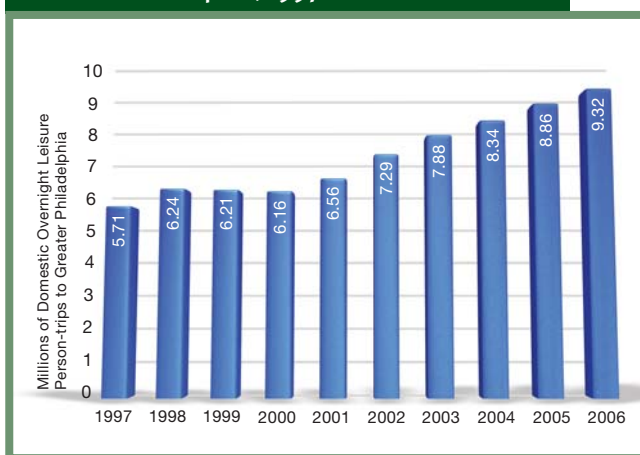
- In 2006 there were 26.39 million domestic visitors to the Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties). Total visitation to the region decreased 3.3% from 2005 to 2006, due primarily to decreases in leisure day-trippers (down 8.2%) and overnight business trips (down 7.8%). (Source: DKS&A)
- Domestic overnight leisure visitation increased 5.2% between 2005 and 2006 to 9.32 million, and now comprises 35% of all trips to Greater Philadelphia, up from 30% in 2000. This increase marks the sixth consecutive year that overnight leisure tourism has grown. (Source: DKS&A)

**Domestic Visitor Volume to Greater Philadelphia by Market Share, 2000-2006**



Source: DKS&A

**Domestic Overnight Leisure Visitation to Greater Philadelphia, 1997-2006**



Source: DKS&A

## A Note on Methodology

In order to measure visitor segments, GPTMC contracts with D.K. Shifflet & Associates, Ltd. (DKS&A), a national tourism research firm. Over the years, DKS&A has surveyed a national database of travelers, and using its proprietary model, extrapolates from that sample to determine how many visits to our region are made each year and what the purpose (business or leisure) of visitors' trips are. Prior to the release of the 2006 estimates, DKS&A used a consistent methodology to generate the visitor volume estimates.

In 2006, DKS&A announced a shift in its methodology, introducing a number of new elements into its model. This methodological shift occurred late in 2006 and did not allow sufficient time for destinations, including Philadelphia, to vet the new model. As a result, the data we present here for the number of trips taken to Greater Philadelphia are based on the same methodology we and DKS&A have used since 1997.

All visitor volume numbers are estimates based on survey data of a sample of travelers, and consistency in methodology is key in ensuring that visitor volume estimates are comparable from year to year. DKS&A has created a review panel consisting of tourism researchers and statisticians to examine its existing and new models. When there is industry-wide consensus that a shift in methodology for estimating visitor volume for destinations is warranted, Philadelphia and other destinations will adopt that methodology.

## Where Are Our Visitors From?

Greater Philadelphia is within a five-hour drive of about one-quarter of the U.S. population. Most of our overnight leisure visitors (about 80%) drive to our region. Philadelphia's proximity to other major East Coast metropolitan areas and our drive-market visitorship helps us to shape our "choicest" advertising markets.

The table below presents three different sources of data on our top visitor markets:

- The first column—from DKS&A—shows the top 10 points of origin (by designated marketing areas or DMAs) of our **overnight leisure hotel visitors** based on a randomly selected national sample of respondents. The major urban centers of the East Coast clearly constitute our top markets.
- The second column shows how these top markets rank in terms of **visitation to gophila.com**. (Since Web visits are broken out by city, rather than by DMA, the rank listed is for the largest city within the DMA.)
- The third column shows the portion of 2006 **hotel bookings on gophila.com** from each of these DMAs. Together, our top 10 points of origin make up 79% of total hotel bookings on **gophila.com**.
  - 7,255 reservations were booked on **gophila.com** in 2006, accounting for only a small fraction of the eight million-plus total room nights in the region. As a result, **gophila.com** ZIP code data is the only indicator and is not necessarily representative of all visitors to the region.

Top Markets for Visitors to Greater Philadelphia

Designated Marketing Area (DMA)	Paid Overnight Visitor Rank	Visits to gophila.com Rank	% of gophila.com Hotel Bookings
	2003-2005	2006	2006
New York, NY	1	2	23%
Philadelphia, PA	2	1	31%
Washington, DC	3	4	6%
Hartford/New Haven, CT	4	105	1%
Wilkes-Barre/Scranton, PA	5	104	1%
Boston, MA	6	10	2%
Rochester, NY	7	63	1%
Harrisburg region, PA	8	49	9%
Pittsburgh, PA	9	28	1%
Baltimore, MD	10	9	4%
Source:	DKS&A	gophila.com	gophila.com

## Grounds for Engagement

In order to engage audiences, we must learn who they are, why they travel and what they love (or would love) about the Philadelphia region. This past year, that meant going on the road.

In the fall of 2006, GPTMC's research staff traveled to five cities around the country and conducted 13 focus groups to learn what people thought of the Philadelphia region, what might entice them to visit and how we need to shape our messaging to pique their interest.

But why focus groups and why now? GPTMC has been keeping its finger on the pulse of visitors for years through surveys and local focus groups. Each season, we conduct hundreds of surveys with visitors who stay in our hotels and conduct focus groups with visitors who booked their hotel stay through **gophila.com**. These visitors have taught us a lot about what messages were effective in motivating them to visit, what intrigued them about Philadelphia and what they enjoyed most about visiting the region.

What we could not learn from these visitors, however, is why someone might have passed up a visit to Greater Philadelphia. For those we had not yet reached, what were we (or they) missing? How could we refine the messages we convey about the Philadelphia region through advertising, public relations and on our Web site?

Focus groups took place in New York, New York; Bethesda, Maryland; Boston, Massachusetts; Atlanta, Georgia; and Chicago, Illinois. A total of 130 individuals took part in the groups, and we used a screening questionnaire to make sure that group participants were:

- **Diverse:** We questioned men and women, younger and older travelers, a variety of ethnicities and races and city and suburban residents.
- **Not too familiar with Philadelphia:** Participants could not have grown up in or around Philadelphia and could not have visited the Philadelphia region in the past five years.
- **Not averse to visiting Philadelphia:** To get the most constructive feedback, we chose participants who had not visited recently or even necessarily considered it, but did not automatically reject the Philadelphia region as a place they might choose for a getaway or vacation.

Focus group participants did not know that GPTMC sponsored the groups, and we learned a great deal about their general travel interests, their views on urban vacations in general and their impressions of various urban destinations (including Philadelphia) before we asked our destination-specific questions.

The key insights from the groups became integrated into all facets of our marketing, from the pictures we use to represent our place to the way we talk about the region on the Web and in advertising. Here is a sample of our key learnings from the focus groups:

- **Greater Philadelphia has now “made it” as a destination:** Participants are ready to believe that Philadelphia offers an exciting visitor experience, and we need to claim that in our advertising. **Our advertising messages should therefore be more “aspirational”** than we had been making them—they need to show the total trip experience the region can offer rather than focusing on converting existing visitors into hotel guests.
- **“Sleeping Over” is no longer the hook:** The “sleep over” message does not work as well nationally as it does in our local markets (“Of course I’d sleep over, I’m flying in from Boston,” said a Boston focus group participant). In addition, for the participants, metropolitan getaways are all about non-stop activity; **sleep is a secondary concern.**
- **Our place needs to be front and center in our advertising:** Visitors are interested in the entire experience a place has to offer, not simply a single event or attraction, and **the advertising needs to convey this sense of place through images.** We learned what images were most engaging to visitors—nightlife and spectacular restaurant settings, landmark buildings, historical sights and distinctive architecture, beautiful suburban settings and alluring towns.
- **History should be a featured element of Greater Philadelphia’s unique sell:** Participants were disappointed when they did not see historical icons in advertising for the Philadelphia region because—to the extent they are aware of the region as a place for tourists—**it is those historical attractions that they knew about.** However, history needs to be balanced by other activities in order to create the sense of an exciting mainstream vacation destination. In other words, history is a distinctive supporting point to a bigger emotional positioning.
- **Raising awareness and interest in Greater Philadelphia requires advertising:** Markets where GPTMC has been advertising for years show distinctly **more awareness of the transformation** the region has experienced and more interest in seeing it for themselves. New Yorkers and those from the Washington, DC area had heard more about the new Philadelphia and were ready to believe that it was worth the trip. Those in Atlanta and Chicago, on the other hand, did not really have the Philadelphia region on their radar screen as a place to visit and had only a vague awareness of what it has to offer.



## II. ECONOMIC IMPACT: A \$10 BILLION INDUSTRY

“When you have organizations like GPTMC that are out there every day talking about the wonders of visiting here and the many attractions, it makes us look more appealing and that pays off for our residents.”

- Mark Schweiker, president, Greater Philadelphia Chamber of Commerce

### Economic Impact for the Region

The economic impact of tourism on the regional economy comes not only from spending by visitors, but also from area businesses that reinvest tourist dollars by buying goods and services locally and employing regional residents. Total spending impact, which combines what visitors spend in Greater Philadelphia with how many of their dollars are reinvested in our regional economy, is a more complete representation of tourism’s contribution to the region’s citizens, businesses and government institutions than visitor spending alone.

Data collected on behalf of GPTMC by Global Insight demonstrate how powerful the tourism business is for the Philadelphia region:

- **The total spending impact of visitors to the Philadelphia region for 2006 was \$10.44 billion.** Direct sales were \$6 billion, and those sales generated an additional \$4.44 billion in indirect and induced spending to reach the \$10.44 billion figure.
- **Visitors directly spent \$6 billion in the Philadelphia region in 2006,** primarily on accommodations, food, entertainment, shopping and transportation (within the region only—transportation costs incurred to and from the region are excluded).
- Tourism spending also supports regional jobs. In 2006, **128,524 jobs were attributable to the industry,** resulting in \$3.97 billion in total wages.
- Federal, state and local agencies combined to collect **\$1.49 billion in taxes** from visitor spending in Philadelphia.
- Without the taxes generated by tourism to our region, **every household would have to pay an additional \$410 in state and local taxes** in order to maintain the current level of tax receipts.

Greater Philadelphia Tourism Economic Impact  
(\$ in billions, jobs in units)

Category	2006	2005	2004
<b>Spending Impact</b>	<b>\$10.44</b>	<b>\$10.08</b>	<b>\$9.66</b>
Direct Visitor Spending	\$6.00	\$5.79	\$5.58
Indirect Spending	\$1.97	\$1.91	\$1.81
Induced Spending	\$2.47	\$2.38	\$2.28
Jobs Supported	128,524	126,986	123,742
Wages Generated	\$3.97	\$3.82	\$3.65
Taxes Generated*	\$1.49	\$1.47	\$1.44

\*Federal, State and Local

Source: Global Insight

Leisure tourism accounts for **60% of all tourism spending impact**, up 4% from 2003. That translates into:

- **\$6.26 billion** in direct, indirect and induced spending
- **77,114 jobs** accounting for \$2.29 billion in wages
- **\$894 million** in federal, state and local taxes

**Greater Philadelphia Leisure Tourism Economic Impact (\$ in billions, jobs in units)**

Category	2006	2005	2004
Spending Impact	\$6.26	\$6.05	\$5.70
Jobs Supported	77,114	76,192	73,008
Wages Generated	\$2.38	\$2.29	\$2.15
Taxes Generated*	\$0.89	\$0.88	\$0.85

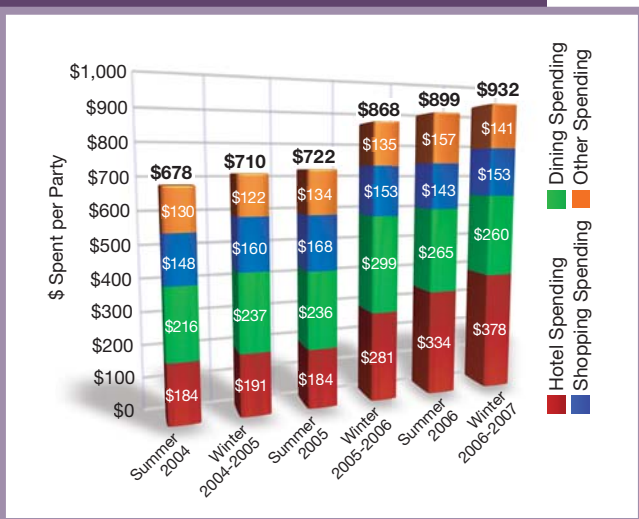
\*Federal, State and Local

Source: Global Insight

**Hotel Visitor Spending**

In addition to measuring economic impact for the entire region, GPTMC uses seasonal hotel surveys to get a picture of how much hotel visitors to our region are spending on their trips. Over the past three years, we have seen hotel visitor spending consistently rise, fueled primarily by increased spending on hotel rooms. Spending on dining has also increased to \$260 per trip for an average party of two people staying an average of two nights in the region.

**Hotel Visitors Spend More Each Season**



Source: GPTMC seasonal hotel surveys, 2004-2007

**Distinct Markets**

GPTMC tracks visitor spending patterns to identify and cultivate groups that spend more per trip than average and, as a result, have a greater impact on the regional economy. Three such groups are repeat visitors, high-income visitors and gay, lesbian, bisexual and transgender (GLBT) travelers.

**1. Repeat Visitors**

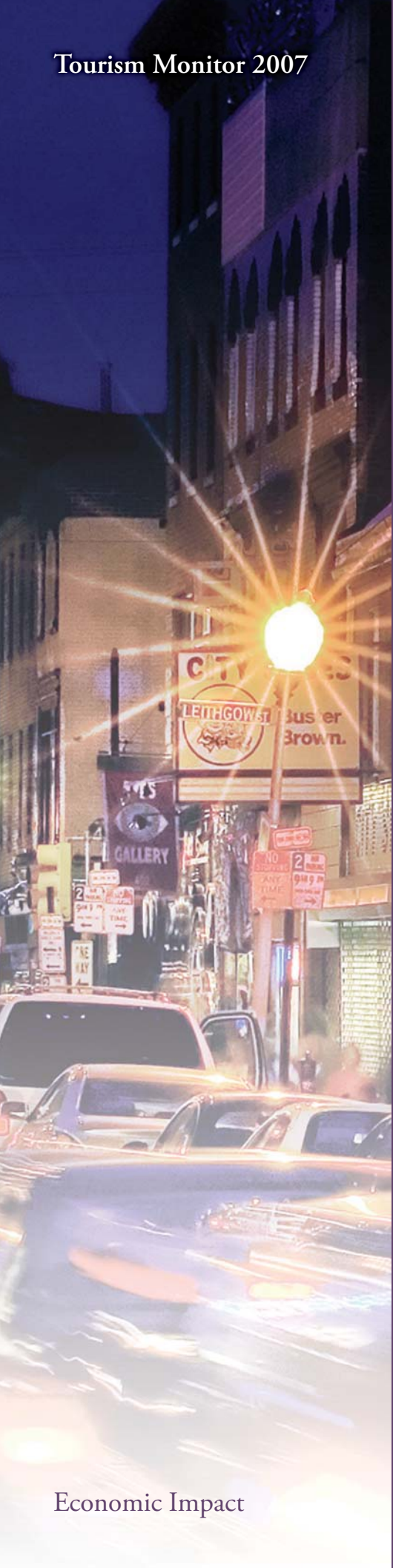
Repeat visitors are loyal and spend more with each visit. Regional hotel visitors who report taking four or more trips to Greater Philadelphia in a year spend 20% more than those who visit only once. Repeat visitors have moved beyond Greater Philadelphia's historic attractions and discovered our shopping and dining scene, spending significantly more in each of those categories.

**Repeat Visitors Spend More**



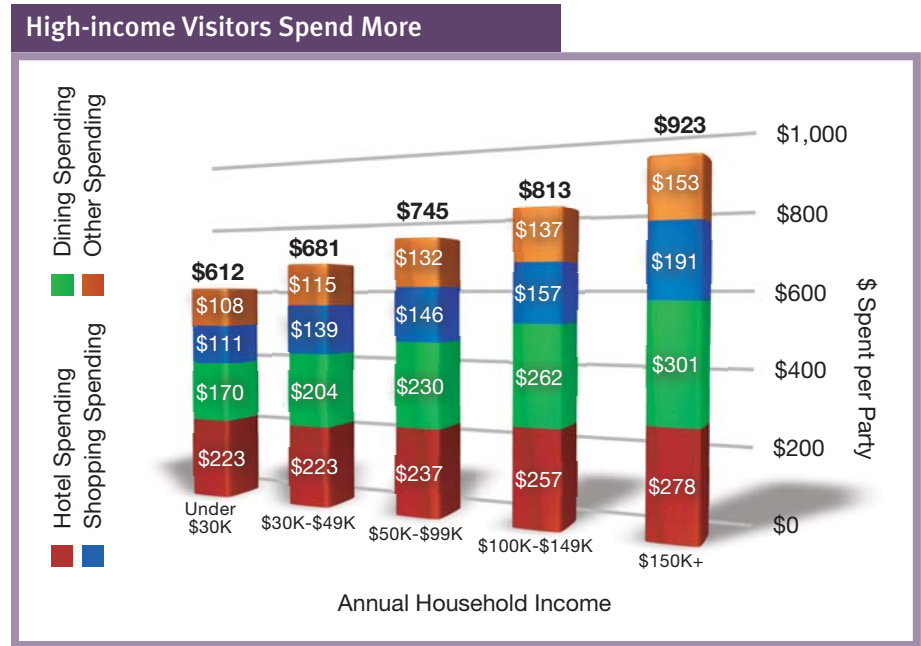
Source: GPTMC seasonal hotel surveys, 2004-2007

Higher shopping expenditures are fueled by discovery of the wide range of shopping options in the region. For instance, 13% of those who have visited multiple times in the previous year reported going to the King of Prussia Mall during their visit, compared to only 7% of one-time visitors (the majority of those surveyed stayed in Center City hotels).



## 2. High-Income Visitors

It comes as no surprise that higher-income visitors spend more per trip. Tourists who are “big spenders” are important to track because they support other dimensions of the hospitality industry, such as our high-end restaurants, boutique shops and live performance venues. As the following graph shows, wealthier visitors are especially likely to spend on shopping and dining in the region.



Source: GPTMC seasonal hotel surveys, 2004-2007

## 3. GLBT Travelers

GLBT travelers are known to have high disposable incomes and a willingness to spend on travel. A study conducted by the Travel Industry Association of America (TIA) and Harris Interactive in the winter of 2007 demonstrates that while the GLBT population remains small in numbers, GLBT buying power is extremely strong.

TIA and Harris also looked at average spending per trip and found that GLBT travelers spend substantially more on their trips. Gay men traveling alone spend 48% more per trip on average than heterosexuals traveling alone, with lesbians and bisexuals also spending more than heterosexuals on average.

GPTMC has been extending the invitation to gay travelers for the past three years, building a campaign based around our renowned **Philadelphia – Get Your History Straight and Your Nightlife Gay®** tagline.

The Philadelphia region is well positioned to invite gay and lesbian travelers to engage in the same activities that all of our visitors love. 71% of GLBT respondents said they would visit Philadelphia to see its historical and cultural sights, by far the top reason cited.

## Quality-of-Life Indicators

Metropolitan destinations that are good to visit are also good to live in. When a metropolitan destination is attracting lots of tourists, it means:

- Its streets are clean and safe.
- It has good shopping and dining (two of travelers' favorite things to do).
- Residents and visitors are energized by each other, with residents benefiting from improved amenities and attractions in the hospitality sector and visitors feeding off of the authenticity and passion of locals they encounter.

In Philadelphia's case, the relationship between a good tourism environment and a high quality of life for most of our residents is extremely strong. When we look at some key indicators for Greater Philadelphia, it is evident that our status as a premier tourism destination is consistent with our growth as a great place to live and work.

### A Great Place to Live

- Philadelphia has the third-largest downtown residential population and the most downtown households in the United States. (Source: Center City District [CCD])
- Our regional population continues to grow despite a slight decline within the city limits. Bucks, Chester, Delaware and Montgomery counties all gained residents between 2000 and 2006, adding nearly 5% in population among them. Greater Philadelphia's total population is estimated at 3.89 million for 2006. (Source: U.S. Census Bureau)
- Building permits (per unit) were up 275% between 2002 and 2004 in Philadelphia, from 800 to 3,000. (Source: Metropolitan Philadelphia Indicators Project [MPIP])
- Shopping and dining are thriving in our downtown.
  - Shopping districts in Center City (such as The Shops at Liberty Place and stores on Walnut Street in the Rittenhouse Square area) have extended their hours to accommodate residents and tourists alike.
  - There are now 216 fine dining restaurants in Center City, a 4% increase from 2005 to 2006 and a 232% increase from 1992 when there were just 65 fine dining establishments. (Source: CCD)

### A Great Place to Work

- Regional employment has grown by 12.3% in the last decade. (Source: CCD)
- 32% of the regional workforce is in the "creative economy" sector: advertising, architecture, art, design, fashion, film, music/performing arts, publishing, research and development, software, TV and radio, video games. (Source: MPIP)
- Philadelphia is growing jobs—a turnaround from decades of job loss—at a rate of about a quarter percent in 2006. (Source: Bureau of Labor Statistics)
- Perceptions of the business environment are vastly improved:
  - "The city has a long way to go, but it's back in the game, where it wasn't even on the sidelines a few years ago." – Mark Zandi, chief economist and co-founder, Moody's Economy.com, Inc.
- The "Cure Corridor" of pharmaceutical industries extending down from New Jersey across Greater Philadelphia is the worldwide center of pharmaceutical research and development. (Source: Global Insight)
- Office industries employ 144,100 people (up 26% since 1990), and the health care and education industries employ 190,200 people (up 32% since 1990) in Center City alone. (Source: CCD)



### III. HOTELS AND THE LEISURE TRAVELER

“GPTMC’s campaigns have really created a broad-based, seven-days-a-week business. Saturdays used to be a weak time in the city, and now it is our highest occupancy night.”  
 – John Kroll, president, Greater Philadelphia Hotel Association

Greater Philadelphia’s character has changed dramatically as leisure visitation has grown. Our downtown is filled with people with maps in hand, and as we demonstrated in the previous section, Economic Impact, the businesses and residents of our region have felt the difference that tourists make. Hotels, probably more than any other business segment, feel the impact of the success of tourism in Greater Philadelphia.

Because of the centrality of the hotel industry in serving tourists and in generating returns based on tourism, **GPTMC devotes a significant portion of its research program to understanding and tracking the hotel industry in the region.**

Three major research initiatives conducted over the past few years are the pillars of our hotel research program:

- The monthly *Philadelphia-area Hospitality Industry Snapshot*
- GPTMC hotel visitor surveys
- Trend spotting for the regional hotel industry

#### Philadelphia-area Hospitality Industry Snapshot

In partnership with the Philadelphia Convention and Visitors Bureau (PCVB) and the Greater Philadelphia Hotel Association (GPHA), GPTMC commissions the monthly *Snapshot* provided by PKF Consulting. The report provides overall hotel statistics for the Philadelphia region and for Center City.

- Occupancy and average daily rates are strong in Greater Philadelphia, Philadelphia County and Center City (our central business district).

2006 Greater Philadelphia Hospitality Industry Overview

	Greater Philadelphia	Philadelphia County	Center City	National
Hotel Supply	11,380,591	5,167,539	3,689,654	4.5 billion
Hotel Demand	8,024,398	3,798,412	2,715,329	2.9 billion
Hotel Occupancy	70.5%	73.5%	73.6%	63.4%
Average Daily Rate	\$121.05	\$143.68	\$156.34	\$97.31
Revenue per Available Room	\$85.35	\$105.61	\$115.05	\$61.69

Source: Smith Travel Research

Market Mix

The cooperation of the three sponsoring organizations—GPTMC, PCVB, GPHA—means that we have excellent measures for market segmentation in our hotels, something that is notoriously difficult to track. The market mix for the five-county region is not available prior to 2004, as it has not been calculated reliably until the advent of the *Snapshot* in the past two years.

- In 2005 and 2006, individual leisure travelers occupied 32% and 31%, respectively, of all regional hotel rooms.
- In Center City, the individual leisure travel segment has grown from a low of 14% in 1997, the year GPTMC began advertising, to 25% of downtown hotel occupancy in the past few years.

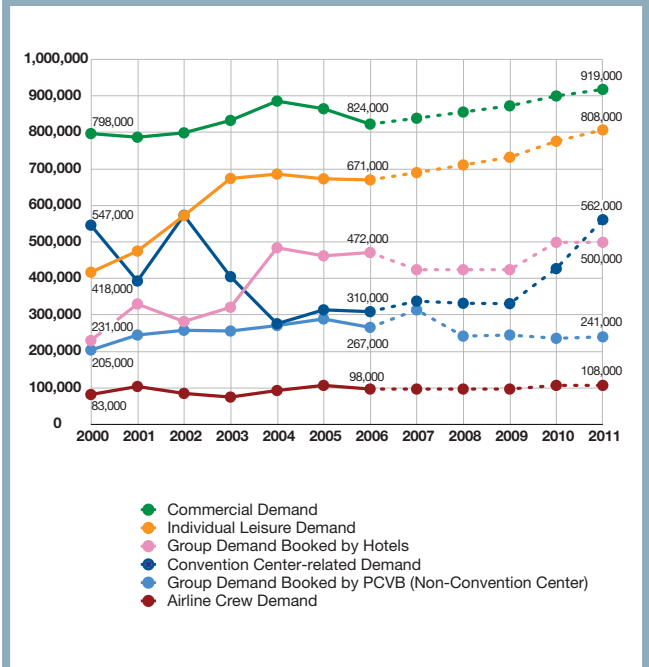
Center City Hotel Market Mix, 1997-2006

Year	Commercial/ Government	Convention and Group	Individual Leisure	Airline Crews
1997	37%	43%	14%	6%
1998	37%	41%	17%	5%
1999	36%	40%	20%	4%
2000	35%	43%	18%	4%
2001	34%	41%	21%	4%
2002	31%	43%	22%	4%
2003	33%	38%	26%	3%
2004	33%	38%	25%	4%
2005	32%	39%	25%	4%
2006	31%	40%	25%	4%

Source: PKF Consulting

**When the convention and group segment is disaggregated, individual leisure hotel demand is the second-largest segment (after transient business) in Center City.** Leisure has grown dramatically since GPTMC began marketing and is expected to continue to grow for the next few years. The graph to the right shows hotel demand in Center City broken into six segments: commercial demand; individual leisure demand; group demand booked by hotels; Pennsylvania Convention Center-related demand; non-Pennsylvania Convention Center demand booked by the PCVB; and airline crew demand.

Center City Hotel Demand and Projections, 2000-2011



Source: PKF Consulting, April 2007

GPTMC Hotel Visitor Surveys

The *Snapshot* tells the story of the hospitality industry from a broad, regional perspective. GPTMC’s seasonal hotel visitor surveys tell the story from the perspective of those staying primarily in our downtown hotels.

Every season, GPTMC e-mails a survey invitation to each of the thousands of visitors who booked their hotel stay on **gophila.com**. Since the summer of 2004, we have gathered 3,892 surveys from visitors.<sup>4</sup> During the summer of 2007, we supplemented our online survey of hotel visitors with in-person interviews of 300 downtown hotel guests. Key findings from the research include:

- “Because there’s so much to do” is the top reason respondents offer for visiting Philadelphia, followed by history and museums and culture. When asked about specific activities they enjoy, the top mentions are neighborhood tours, musical performances and sporting events.
- Nearly half (46%) of the visitors interviewed in downtown hotels during the summer of 2007 were in town for a leisure trip. Sightseeing (48%) was the top reason to visit offered by leisure travelers, followed by a general getaway (35%) and visiting friends and relatives (15%).

<sup>4</sup> Full reports on each seasonal hotel survey are available at [gophila.com/research](http://gophila.com/research).



- Among the business travelers we surveyed (54%), most included a leisure element in their trip:
  - 69% visited tourist attractions.
  - 63% did some shopping.
  - 31% lengthened their stay to include more than just business.
  - 5% extended their visit to stay overnight in the region even though they did not have to.

### Trend Spotting

The *Snapshot*, GPTMC surveys and data from Smith Travel Research provide valuable information about the hotel industry in our region. Putting this information together often yields insights into hotel trends that help us shape our marketing approach and help us fill hotel rooms more nights of the week, more weeks of the year.

#### All Year Round, All Week Long

The increase in overnight leisure visitation to the region has had an impact on hotels all year round and all week long. Key indicators demonstrate how strong the leisure segment is on both weekdays and weekends and in all four seasons:

- Hotel compression on Saturday nights, when many hotels are filled, and GPTMC’s recent “weekend when you want it” messaging has encouraged many visitors to arrive on weekdays rather than weekends.
  - In 2004, 12% of those booking hotel rooms on **gophila.com** arrived at their hotel on a weekday (Monday-Thursday). By 2006, the portion of weekday arrivals had more than doubled to 25%.
- Hotel rates on weekends have grown faster than weekday rates, driving the increased overall average daily rates (ADR) for the Philadelphia region:

Greater Philadelphia Hotel ADR, January-December 2006

	January 2006	December 2006	% Change
Weekend (Friday-Sunday)	\$101.77	\$115.24	13.2%
Weekday (Monday-Thursday)	\$115.53	\$120.28	4.1%

Source: Smith Travel Research

- Leisure travel is at its peak in seasons when convention and business travel is slower. The most popular seasons for leisure travelers are winter and summer. Weekday hotel bookings on **gophila.com** (virtually all of whom are leisure travelers) rise during the summer seasons when hotels in our region tend to be less busy during the week.
  - In 2006-2007, 18% of winter travelers (December-February) who booked a hotel room on **gophila.com** arrived on a weekday, compared to 31% of summer travelers (June-August 2007). (Source: **gophila.com**)

## Marketing Impacts Hotel Travel Patterns

Leisure tourists can be motivated through marketing to act now. They take their trips because they want to, not because they have to, and GPTMC uses engaging tools to increase interest in and visitation to Philadelphia:

- **gophila.com**, the official tourism Web site for Greater Philadelphia, received 4.5 million visits in 2006 and is almost always the top search result for the term “Philadelphia” on Google. As the call to action for all of GPTMC’s marketing, **gophila.com** markets the destination and also “closes the deal” with visitors by allowing them to book their hotel stay on the site and by providing information and links to hotels for those who want to book directly with the hotel.
- Brand building for the destination through advertising and public relations yields consistent, positive coverage of Philadelphia in news outlets like *The New York Times*, *The Washington Post* and *USA Today*. Here are a couple of examples of the media coverage hotels received this year:
  - “Today’s Philadelphia is as hip as it is historic. And nowhere is the view better, the service more impeccable or the desire to linger longer than in the city’s top hotel suites.” – *Elite Traveler*, January-February 2007
  - “The Park Hyatt Philadelphia and the Bellevue are smack in the middle of everything, including some excellent restaurants, one of which is XIX, right in the hotel, and easily one of the top restaurants in the city, with panoramic views that sing of Brotherly Love.” – *Entree*, March 2007
- These news stories extend the buzz about Greater Philadelphia by appearing in newspapers that serve markets our advertising does not reach. In addition, newspaper stories covering a destination and its hotel offerings provide more detailed information than can ever be contained in an advertisement and have the value of being a third-party endorsement that readers can rely on.
- Our relationship with AAA expanded in 2006 and provided more ways to reach this audience of highly qualified travelers. In partnership with American Tours International (ATI), AAA Mid-Atlantic and the PCVB, we created six new Philadelphia packages: Shop Philadelphia, Philadelphia Heritage and Art: *Tutankhamun and the Golden Age of the Pharaohs*, Philadelphia’s Great American Getaway, *Renoir Landscapes* and two Gourmet Philadelphia packages. In addition, our AAA representative visited all 53 AAA Mid-Atlantic branch offices representing more than 500 AAA travel and retail agents.
- Partnerships with local attractions ensure that visits to local sights are converted into overnight stays. For instance, GPTMC’s partnership with The Franklin Institute during the *Tutankhamun and the Golden Age of the Pharaohs* exhibition included a \$1.3 million marketing campaign (with \$1 million provided by a grant from the Commonwealth of Pennsylvania and an additional \$300,000 provided by GPTMC). The campaign focused on out-of-market advertising with a call to action to book the **King Tut Hotel Package**. The results of the campaign have been compelling:<sup>5</sup>
  - Philadelphia sold its one millionth exhibition ticket faster than any other host destination, including Los Angeles, Chicago and Fort Lauderdale.
  - 21,254 **King Tut Hotel Packages** were sold through September 2007 to fill 28,264 room nights and generate \$6.5 million in estimated hotel revenue. (A final count of hotel room nights generated by the King Tut exhibition will be available by December 2007.)

<sup>5</sup> Final results from the marketing effort will be available in late 2007 and will be posted on [gophila.com/research](http://gophila.com/research).



### Hotel Packaging Sells More Than Hotel Packages

Following the events of September 11, Mayor Street convened GPTMC and the hotel community to address the event's impact on regional hotels. With an investment from the city, GPTMC developed the **Philly's More Fun When You Sleep Over**<sup>®</sup> campaign, and the result was the fastest recovery of any major city after 9/11.<sup>6</sup>

In 2002, when many tourist destinations were suffering, Philadelphia experienced:

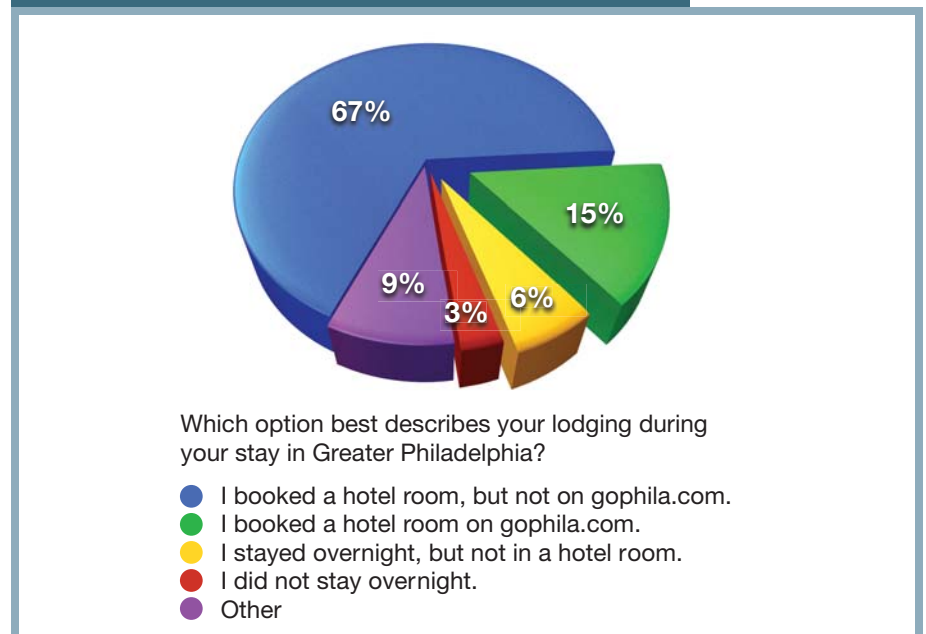
- An 11% rise in overnight leisure travel to the Philadelphia region
- A 20% rise in leisure hotel rooms occupied in Center City
- A 10% rise in overall hotel demand in Center City

**Philly's More Fun When You Sleep Over**<sup>®</sup> generated \$185 in direct, indirect and induced visitor spending in the region for every dollar spent on the campaign.

Hotel packages are a service for both hotels and visitors that not only generates sales on **gophila.com**, but also achieves the primary goal of selling the destination to leisure travelers. Intrigued by hotel package offers, visitors often call hotels directly or go to travel Web sites like Expedia or Orbitz. They may ultimately book a different offer that suits them better, but the package offer was the initial "hook" that led them to explore the idea of visiting the Philadelphia region.

For instance, visits to **gophila.com** generate more bookings off the site than on our site. 67% of **gophila.com** users from outside the region who visited Greater Philadelphia reported booking their hotel stay on a site other than **gophila.com**. Therefore, **gophila.com** hotel offers are effectively accomplishing GPTMC's ultimate goal: bringing more leisure travelers to the Philadelphia region.

**gophila.com Leads to More Bookings Off-site**



Source: GPTMC survey of "My Trip" custom itinerary users who visited Greater Philadelphia

<sup>6</sup> According to Smith Travel Research and reported in *The Philadelphia Inquirer*, December 19, 2001, and *Hotel Business*, January 21, 2002.

## Philly Overnight Year-Round

GPTMC's seasonal **Philly Overnight® Hotel Package** has been consistently popular over the past few years, even with price increases as the package evolved from its original two-nights-for-the-price-of-one offer. In the past, the package had been offered seasonally, as part of our annual winter and summer advertising campaigns. In 2007, with the shift to a more image-based advertising campaign, we took a fresh look at this strategy.

In tracking **gophila.com's** look-to-book ratio (the percentage of site users checking hotel availability who

went on to book a room in that session), we noticed that people had an increased likelihood to book on **gophila.com** when the package was available. This pattern suggested that demand for hotel rooms still existed in the off months of spring and fall, but in the absence of a special offer they were less likely to book a room.

As a result, GPTMC decided to make the **Philly Overnight® Hotel Package** permanently available after the winter 2006-2007 season. The result has been an extended period (stretching across both the spring and summer seasons) in which the look-to-book ratio has remained at the elevated levels of previous peak months.

## Hotels Offer a Sense of Place Too

When visitors have expectations of a place, they seek hotels that reflect that sense of place as well. Hotel room upgrades and new hotels (2,000 new hotel rooms are in the pipeline to be developed over the next five years, according to PKF Consulting) are necessary for the healthy growth of leisure tourism. With Saturday night hotel occupancy approaching 100% many weeks of the year, we have seen some leisure visitors start their visits on weekdays instead. And, with more coverage of Philadelphia as a design-friendly, creative place, the character of our hotel rooms needs to reflect these attributes as well.

Greater Philadelphia hotels are investing \$220 million in hotel upgrades this coming year, according to a survey conducted by the GPHA. GPTMC's new marketing program, **uwishunu™**, engaged 20 local designers to make over room 414 at The Westin Philadelphia. The result (as seen below) was spectacular, from the wall-length mural to the locally crafted bathroom amenities.

Room 414 at The Westin Philadelphia





## IV. MARKETING THAT CONVEYS A SENSE OF PLACE

“We take delight in physically distinctive, recognizable locales and attach our feelings and meanings to them. Place character is often recalled with affection; its lack is a frequent subject of popular complaint. People are pleased to ‘know’ a great city, or to understand its history.”

– Yan Xu, *Sense of Place and Identity*

Representing place is not an easy thing to do, especially in a 30-second television commercial, a billboard by the side of the road or even a Web site that has three to five seconds to make an impact on visitors before they click off.

How can we capture an entire sense of place and engage people through the marketing tools at our disposal?

This question drives GPTMC’s marketing, and we approach it by carefully crafting our brand message. In this section, we focus on three marketing tools we use to tell our story and motivate visitors to come to the Philadelphia region:

- Advertising
- Public Relations
- [gophila.com](http://gophila.com)

Working together, these three GPTMC marketing components create a “surround sound” of influence on potential visitors. Continuing that metaphor, research helps determine what songs to play and what frequencies to use and tells us how loud our visitors are turning up the volume.

### Advertising

Advertising is GPTMC’s opportunity to engage an audience that is not focused on our destination and show them a Philadelphia they did not expect. Our advertising has two important goals, and research plays a central role in each:

- **Building the image of the Philadelphia brand**
  - Strategic research, such as focus groups, helps us determine what advertising messages can enhance the perception of the Philadelphia region.
- **Inducing visits to the Philadelphia region**
  - Tracking research through surveys and Web site measures allows us to monitor how well advertising translates visitor interest into visitor action.
  - Careful selection of our media markets and vehicles allows us to reach the most receptive audience for our message.

## Philly's More Fun™ Campaign

In 2004, GPTMC's advertising shifted from a "retail" message featuring discounted hotel packages to a so-much-to-do message that focused on our "place." This shift was undertaken because:

- Hotel rates and occupancy were rising throughout the region.
- There was tremendous national attention on Greater Philadelphia as a destination.
- The regional tourism infrastructure and product had grown significantly.

The way we position the Philadelphia region in our advertising has evolved as we learn more about our visitors and see advertising techniques change:

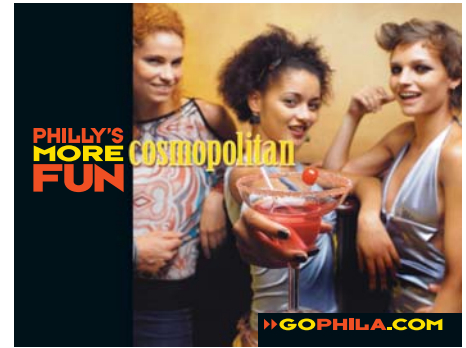
- Travelers need a "hook" that serves as a reason to visit a destination, but even the best hook will not work unless it is reinforced by a **perception that the entire place is worth the trip**. A blockbuster event, iconic historical sights, a family-friendly theme park, a great hotel package or a visit to friends and family is the "excuse" or impetus for a trip. But visitors also need to feel that the place they are coming to will provide entertainment and diversion options to supplement the initial reason for their visit.
- Advertising's goal has turned away from "interrupting" visitors with startling messages that get their attention. Instead, we seek to **engage visitors in a conversation**, beginning with what is relevant to them and inviting them to tell us more.

These two insights into visitors' motivations and advertising's best practices led GPTMC to update our successful **Philly's More Fun When You Sleep Over**® campaign for summer 2007. The focus group research described in the first section of this report, Understanding the Visitor, helped us shape the new campaign. Four key insights from the focus groups came into play:

1. Our advertising needs to convey the **dynamic energy** of the "new Philadelphia" region and truly establish our claim as a premier destination.
  - Many potential visitors still associated Philadelphia with its industrial past, but they had heard pieces of the new Philadelphia story and were ready to embrace it when shown current images of the region.
2. Visitors need to be given a glimpse of **all there is to see and do** in the Philadelphia region, rather than emphasizing the opportunity to sleep over here.
  - The focus of the campaign had shifted from a retail message encouraging day-trippers to spend the night to inducing new visits to the region by enhancing awareness and perception of the Philadelphia brand.
3. The images we use in our advertising need to **convey the excitement and individuality** that the Philadelphia region has to offer.
  - Images of nightlife and distinctive settings can convey that Philadelphia is both exciting and unique.
4. Greater Philadelphia's **historic icons need to be featured** in our advertising—but only as a piece of the emotional positioning of the campaign.
  - Potential visitors were uncomfortable with advertising for Philadelphia that did not show icons they expected to see, but still wanted the advertising to focus on other activities that would be included in their visit.



The updated **Philly's More** campaign, created in conjunction with Philadelphia-based advertising firm LevLane, is more emotional, aspirational and place-focused:<sup>7</sup>



<sup>7</sup> To see the new **Philly's More** TV commercial, visit [gophila.com/phillysmore](http://gophila.com/phillysmore).

**Media Placement**

Just as research played a part in shaping the renewed campaign, research also helped determine the media vehicles chosen. Three primary shifts took place for summer 2007:

**1. GPTMC entered a new market** and invested more heavily in others:

- Research indicated that Hartford/New Haven, Connecticut, was a strong market for overnight getaways to Philadelphia. Buying media in this secondary market was an attractive option.
  - This decision has yielded immediate results on **gophila.com**, with visits to the site from within Hartford city limits alone more than doubling from about 500 a month in summer 2006 to more than 1,000 a month in summer 2007 (with a corresponding increase in hotel reservations on the site).
- GPTMC added a special concentration of advertising in the suburban communities of our traditional feeder cities.
  - In the focus groups, we noticed a trend in some of our key feeder markets: Philadelphia was a getaway destination for suburbanites who live outside of big cities, such as New York and Washington, DC.
  - When we looked at ZIP code data from **gophila.com** hotel bookings, 80% of visits booked on **gophila.com** from our key feeder markets were booked by suburban residents, while just 20% were from the cities themselves.
  - Summer 2007 advertising concentrated on adding “two-sheets” (train posters) and “30-sheets” (non-highway billboards) in the suburbs of Hartford, Washington, DC and New York City.

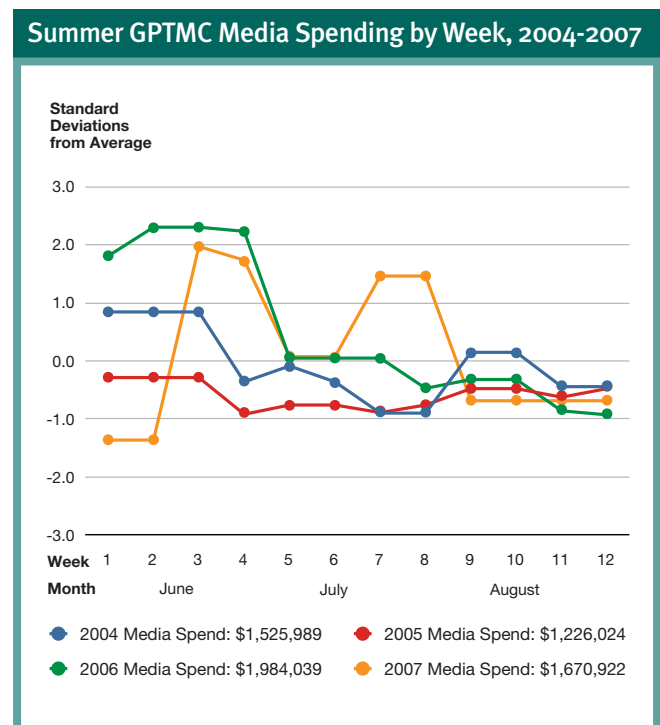
**2. GPTMC increased online advertising**—both the amount and the sophistication:

- Despite a reduced overall campaign budget from the previous summer, GPTMC increased the summer 2007 budget by 6% for an online advertising program that included a combination of search engine marketing (on both Google and Yahoo), geo-targeted advertising and online display (both static banners and active-rich media).

- With the shift to more online advertising, GPTMC gained the opportunity to track advertising success in real time. As a result, we were able to shift our buy based on on-site indicators and maximize our investment in keywords and Web site placements that produce engaged visitors who stay longer and do more on **gophila.com**.

**3. GPTMC adjusted the timing** of this summer’s campaign to include multiple peaks throughout the summer:

- The graph below shows GPTMC’s weekly media spending for the past four summers.<sup>8</sup> In 2007 (represented by the orange line), spending peaks at the beginning of the summer, in late June, and then again in the middle of the summer, in late July. This pattern differs from previous summers, when the major media purchase took place in June with a more limited presence throughout the rest of the summer.



Source: GPTMC

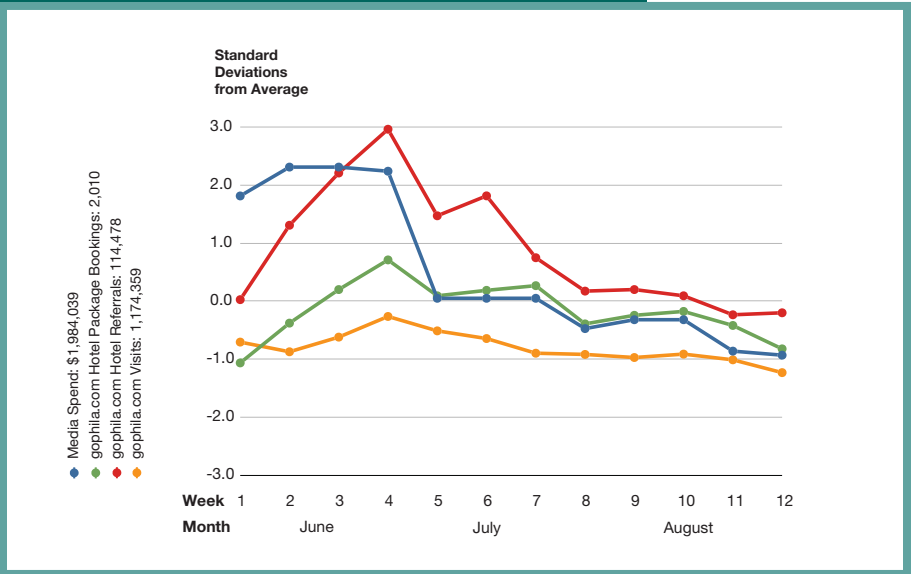
- In tracking conversion measures on **gophila.com** from previous summers, we saw early peaks in hotel bookings and visits to the site. This pattern corresponded with the timing of our media spend, and, like the media spending, bookings and visits declined as the summer wore on.

<sup>8</sup> Tracking graphs in this section of the report show standard deviations from the weekly average over the past four summer campaigns to resolve issues of scale and volatility in different measures.



- The graph below shows our **gophila.com** conversion indicators from summer 2006. Site visits, bookings and “referrals” (site visitors who use our hotel booking engine but may or may not book a stay) all increased in conjunction with advertising spending early in the summer. However, as the advertising presence diminished throughout the summer, so did our conversion indicators:

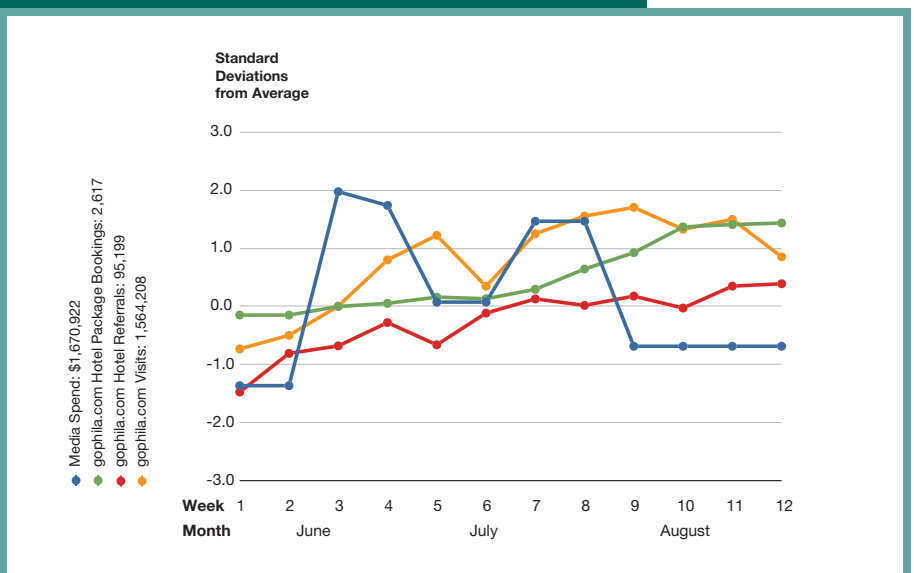
**gophila.com Weekly Indicators, Summer 2006**



Source: GPTMC

- Re-allocating the summer media buy in 2007 had an impact on hotel bookings and visits to **gophila.com** throughout the summer. Our staggered media buy, which featured a heavy period in late July in addition to our traditional push in June, produced increases rather than the declines of previous summers in Web site visits, hotel bookings and hotel referrals over the course of the summer:

**gophila.com Weekly Indicators, Summer 2007**



Source: GPTMC

## Public Relations

How is sense of place fostered by news stories about our destination?

As the word implies, news *stories* present more than “just the facts;” they weave a tale and show pictures of what it is like to be somewhere, how it feels, what you can do and what the memories might be like. These stories are often told by journalists from other cities, and they are disseminated nationally and internationally, where our advertising cannot reach.

By sharing our story with journalists and directly with the public through our new media outlets, public relations presents an opportunity to elevate the perception of Greater Philadelphia as a place to visit. These stories are told through words, pictures, videos and podcasts.

**From January 2006 to June 2007, GPTMC placed 5,223 stories with a combined circulation of 606,392,717.** The most popular stories built a connection between a particular Philadelphia experience—such as the King Tut exhibition, which made its last U.S. stop in Philadelphia, or Fourth of July celebrations—and the other activities and amenities of the entire destination.

What do these top stories convey to travelers about Greater Philadelphia as a place? Each story angle focuses on a different aspect of the Philadelphia experience, but they all have something in common: From Rocky to BYOB restaurants, **uwishunu**™ to the President’s House excavation site, Philadelphia’s brand of independence is reinforced in all of our stories. These topics captured the public’s attention most in 2006-2007:

- The *Rocky Balboa* story and image is a part of Philadelphia. It is the story of the underdog, of the grit and authenticity of the city, of a city with heart. The crowds at the *Rocky* statue at the foot of the Philadelphia Museum of Art attest to the power and popularity of this story.
- BYOB restaurants capture the independent spirit of our restaurant scene, where chef-run spots focus on food and the neighborhood experience. A large percentage of these BYOBs have outdoor seating, and on warmer nights, the entire city feels alive with people dining alfresco, sharing tips between tables and generating a mini-community for the length of time it takes to eat dinner.

- **uwishunu**™ stories capture the flavor of this new campaign, which highlights the best of non-traditional dining, shopping, nightlife, the arts and more in the voice of the people who live and work here. The blog gives visitors the chance to get the inside scoop on authentic Philadelphia. The large pick-up of the **uwishunu**™ Hotel Room Makeover story (see page 23), from **uwishunu.com** to other blogs and traditional Web sites, indicates the city, the region and the country are watching and reading.
- Nothing stands for independence like the icons at Independence National Historical Park and Valley Forge National Historical Park. The completion of Independence Mall with the excavation of the the former President’s House is the best example of the power of place. It is a place where freedom and slavery lived side by side and a place where people who were invisible became visible. Whether it was the Founding Fathers fighting for independence from Britain, enslaved Africans seeking their freedom or the Quakers and Jews of Colonial Philadelphia building their houses of worship without fear, **Historic Philadelphia** encompasses all of their stories and many contemporary ones as well.

We keep track of our visitors’ awareness of articles we’ve placed with our seasonal hotel visitor surveys. More than half of the visitors who book hotel rooms on **gophila.com** report that they either got to **gophila.com** because of a news story, used a story to plan their trip or read a story that got them interested in visiting Philadelphia in the first place.

### Public Relations Impact

Reading a Magazine, Newspaper or Internet Article about Philadelphia...	Total
Got You to Log onto gophila.com	21%
Helped You Plan Your Trip	18%
Got You Interested in Visiting Philadelphia	13%
None of the Above	48%

Sources: GPTMC seasonal hotel visitor surveys, 2005-2007



In addition to the influence these articles have on leading people to explore a trip to Philadelphia, the stories they tell elevate the brand image of Philadelphia. Destination marketing organizations like GPTMC market a product (an entire region) they do not control. Many aspects of regional life get coverage, from stories about industry and sports to crime and education. These stories contribute to the public's overall understanding of what kind of place Philadelphia is. Some of them are positive, and some are negative.

Destination stories generated by GPTMC help balance other coverage of our region. By working with the influencers—journalists who write the stories and produce the broadcasts—GPTMC inspires positive awareness of Philadelphia. Press releases were matched by press events in seven North American cities in 2006-2007 and hundreds of press releases, videos and photographs were distributed to news outlets in the United States and Canada.

## Social Media

As print and broadcast news media reached new levels of saturation with 24-hour news programming, expanding channel line-ups, increasing industry competition and the widespread availability of broadband and computer technology access in households, social media sprung to life. A new and still evolving discipline for marketers, social media is a term that encompasses the new buzz words and platforms we hear in our conversations today, such as avatars, blogs, podcasts, microblogging, social networks, virtual reality, vlogs and more. Social media provides a new way for marketers to directly connect with people and communities on an ongoing basis.

GPTMC utilizes a number of social media tools to reach today's connected visitor and share many different stories about both the new Philadelphia and the historic, iconic Philadelphia. Each connection reinforces our brand character of independence and authenticity. Here are some of the new ways we connected with visitors and residents via social media:

- *BlogPhiladelphia*, our inaugural social media “unconference,” hosted more than 250 attendees from 10 states. The event generated more than 100 blog, podcast and vlog posts, and participants uploaded more than 1,500 related photos to two *BlogPhiladelphia* Flickr groups. *BlogPhiladelphia* leveraged the microblogging tool Twitter to instantaneously send short updates to nearly 400 *BlogPhiladelphia* Twitter subscribers, and the “unconference” was featured on the landing page of twitter.com as one of its 10 featured Twitterers for two weeks.
- GPTMC expanded our reach for the **uwishunu™** campaign and blog by creating a **uwishunu™** page on MySpace. On this page, we connect with more than 400 friends and partners who reside in the MySpace community, and we exchange information about upcoming **uwishunu™** and Philly-centric events, news and more. See [myspace.com/uwishunu](http://myspace.com/uwishunu).
- If a photo lives up to that thousand-word cliché, then GPTMC has quite a novel on our hands in the open-share photo community, Flickr. Within Flickr, we upload, tag, store and link to our ever-expanding cache of images capturing Philadelphia events, people, places and things. See [flickr.com/photos/uwishunu](http://flickr.com/photos/uwishunu).

## gophila.com

**gophila.com** immerses people in the experience of being in **Philadelphia and The Countryside®**. The site is a virtual representation of place. **gophila.com** is the call to action for all of our advertising, public relations and collateral. In addition, it is typically the number one result on Google when people search the term “Philadelphia,” giving it a national and international reach well beyond the markets we advertise in.

Through pictures, maps, podcasts, videos and vivid written descriptions, **gophila.com** brings Philadelphia to people’s homes.

How many people experience the “virtual Philadelphia” on the Web?

- There were more than **4.5 million visits to gophila.com in 2006**, and the popularity of the site has consistently grown since it was created.
  - In addition to the growing number of visits, visitor engagement with the site has increased, with the number of page views rising 42.4% between 2005 and 2006.

Visitation to gophila.com is Climbing				
	2006	2005	2004	% Change
Visits	4.54 million	3.61 million	2.98 million	52.3%
Page Views	24.96 million	17.53 million	14.83 million	68.4%

Source: gophila.com

### gophila.com: A Virtual Place for Tourists

**gophila.com** has three primary goals, so we concentrate our research in three primary areas:

- **Image Building:** How does the site act as an experience of place? Are visitors engaged by the site, spending a lot of time on it, getting to know the region and developing a positive impression of Greater Philadelphia?
- **Trip Conversion:** How does the site act as a motivator for visits? What are the features of the site that are most likely to convert virtual visits to actual visits?
- **Trip Experience:** What can the site do to provide and enhance the best possible experiences in Greater Philadelphia?

### Image Building

Interactive activities like our customizable maps and personal itinerary builder, along with engaging images and presentation, make visitors feel that they are getting a “virtual” tour of our entire region.

One way to measure how engaged visitors are on the Web is to measure how long they stay on a particular page. Pages with a long average page view are said to be “sticky” because they have captured visitors’ interest and engaged them in the site and, by extension, the region. We measure and seek to maximize the “stickiest” pages on **gophila.com**, which currently include:

- Interactive BYOB map
- Events calendar
- Travel tools (maps, vacation guides, etc.)

Sticky pages make for an engaging site that transforms the perception of the region. Of the visitors from outside the region who were surveyed on the site in summer 2007:

- 71% said their interest in visiting the Philadelphia region had either “increased a lot” or “increased a little” (while 28% said it had remained the same) as a result of their time on **gophila.com**.
- 51% said their “impression of Philadelphia had improved after visiting **gophila.com**,” while 48% said it had remained the same.

### Trip Conversion

Our research tells us that **gophila.com** influences and converts far more trips booked off of our site than on it:

- We know, for example, that 67% of site visitors from outside our region who visit the Philadelphia region book a hotel room with another service other than **gophila.com**, while only 15% book on our site (the other 18% do not stay in a hotel during their visit). Booking a stay in Greater Philadelphia is our goal, and booking on **gophila.com** is a service we provide to help meet that goal. When we see so many of our **gophila.com** visitors motivated to book a hotel room—be it on our site or elsewhere—we know we have been successful.



We can also link visitors' activities on **gophila.com**—including how they arrived, the path they took through the site and how long they stayed—with their likelihood to search for and book hotel offers on our site. We know that Web site visitors who take the active step of “interacting” with our site are more likely to visit the Philadelphia region. Here are some activities that describe our site “interactors:”

- 101,000 visitors have subscribed to our general **gophila.com** e-newsletter.
- 1.05 million maps and brochures were downloaded in 2006.
- 1,700 users saved and registered their My Trip custom itinerary in the first year it was available.

### Trip Experience

Whether or not visitors plan an actual trip on **gophila.com**, we learn a great deal about what intrigues them about our place from what they look at on the site. **Watching activity on the Web site is like conducting one-on-one interviews with people as they travel throughout the Philadelphia region.** We can see what they spend their time doing and looking at, what regional activities and sights are most interesting to them, even what surprises them. This information helps us make **gophila.com** more engaging and gives us a window into what we need to showcase about Greater Philadelphia with our other marketing tools, such as advertising and public relations.

- When visitors enter the site after searching for something specific, we learn what the “hook” is to visit our region.
  - In addition to “Philadelphia” (which is by far the top keyword searched to get to **gophila.com**), other prominent phrases include “King Tut Exhibit,” “Philadelphia Restaurants” and “First Friday Philadelphia.”<sup>9</sup>
- Visitors who arrive to the site from a specific search or from an online advertisement and have an engaging online experience tell us a great deal about what types of advertising messages are effective in prompting travel to Greater Philadelphia.
  - GPTMC runs a number of online advertisements, and we track (in real time) which versions yield the most “high-quality” visits to **gophila.com**. Some ads lead to more exploration, longer visits and more conversion activities such as downloads, itinerary building and hotel bookings. We maximize our weekly investment in these advertisements in order to maximize trip conversion.
- The top pages and applications on the site are also a window into the desired experience of visitors.
  - The region is still best known for its history, and the historic content on the site is heavily visited. The Liberty Bell Center and Independence Hall are by far the top units added to users' custom My Trip itineraries.
  - The Dining and Nightlife section of the site was the third most popular in the summer of 2007, behind only the King Tut exhibition and the Events Calendar.
    - Philadelphia's famous cheesesteak rivals, Geno's and Pat's King of Steaks, appear as the #9 and #10 units selected for My Trip, in between historic icons like Valley Forge National Historical Park (#8) and the Betsy Ross House (#11).

<sup>9</sup> *First Friday* is a monthly event during which the businesses of Old City stay open late, and crowds roam the neighborhood to enjoy the galleries, boutiques, restaurants and nightlife.

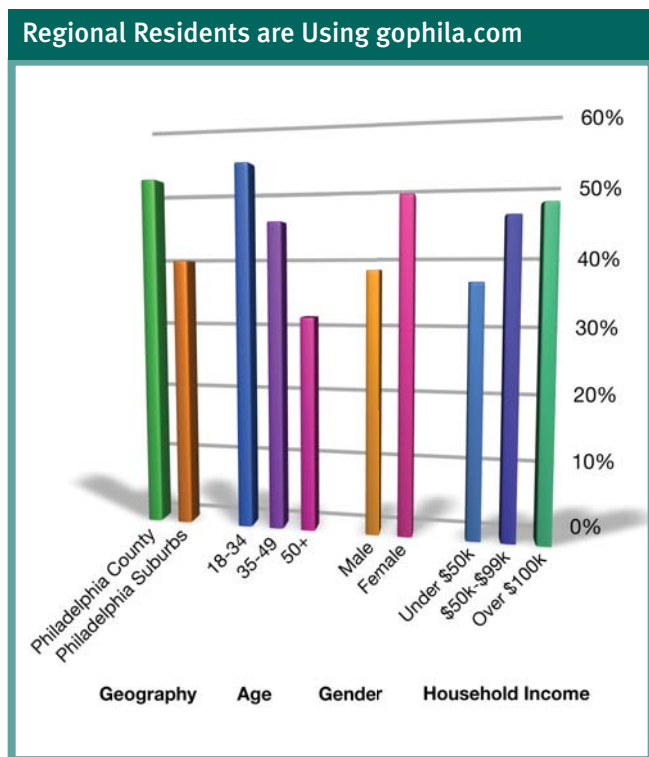
**gophila.com: For Locals Who Want to Be Tourists in Their Own Town**

Although **gophila.com** is the official visitor site for Greater Philadelphia, many regional residents use it as well. Locals know our region as a place to live and work, but **gophila.com** helps them get oriented to Greater Philadelphia as a place to play. Regional residents use the site to plan trips for visiting family and friends and also to plan their own excursions when they act like tourists in their own town.

- Philadelphia is the top ranked point-of-origin for visits to **gophila.com**, with about 20% of total site traffic coming from within the city limits.
- A random sample of regional residents reported that 43.3% have used **gophila.com**. Several demographic groups were more likely than the regional average to have used the site:
  - Philadelphia city residents
  - Younger residents
  - Women
  - Upper-income residents

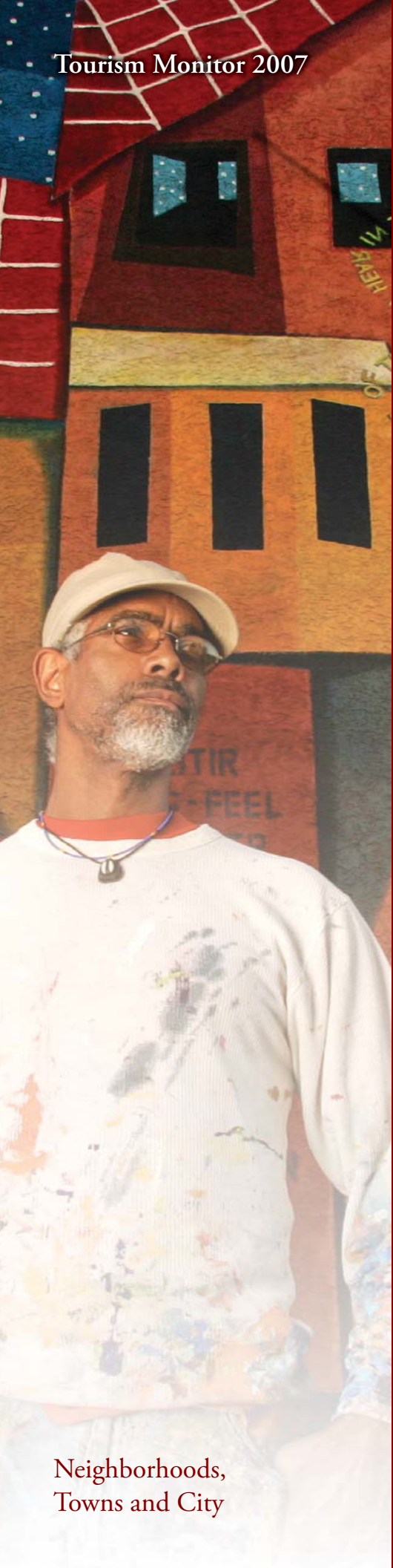
**gophila.com** is a tool that helps locals learn about the region as a tourist would and, for many, that is a whole new way to experience the place they call home. In a recent GPTMC survey of regional visitors who had utilized the My Trip custom itinerary function:

- 77% reported that the My Trip function got them to explore things in Philadelphia that they otherwise would not have.
- 21% were using the tool to plan a trip for visiting friends and relatives, while the rest were planning for their own excursions.



Source: TNS Survey of Regional Residents





## V. NEIGHBORHOODS, TOWNS AND CITY

“The city is so unique...there is a ‘neighborhood’ feel unlike any other. With all the great restaurants, events and historical landmarks, how could you not want to spend time in Philly?” – A Philadelphia visitor and survey respondent

**Philadelphia was always built on neighborhoods, but the depth of offerings in our neighborhoods has grown, and the neighborhoods’ popularity and identities have grown with them.** From the city to the suburbs, our neighborhoods and towns are distinctive places worth visiting. In this section, we review three GPTMC campaigns that create a sense of place by linking neighborhood experiences. The initiatives are:

- **uwishunu™**: An insider look at the city
- **Historic Philadelphia**: Connecting the dots of our most historic neighborhoods and sights to create a total experience for visitors
- **Boundless Philadelphia™**: Promoting the region’s outdoor assets and experiences to position Greater Philadelphia as a great place to enjoy the outdoors

**Each of these campaigns makes accessible what used to be difficult for visitors—and often locals—to access.** The tools we use include advertising, public relations, hotel offers and Web sites ([uwishunu.com](http://uwishunu.com), [gophila.com/historicphiladelphia](http://gophila.com/historicphiladelphia), [boundlessphiladelphia.com](http://boundlessphiladelphia.com)), providing what visitors require to research, book and enjoy their trips.

### Logos Representing GPTMC’s Campaigns



## uwishunu™

**uwishunu™** was funded by the City of Philadelphia in the fall of 2006 after Mayor Street convened a two-part Hospitality Summit with hospitality, business and cultural leaders to identify key opportunities in the travel industry.

The new audience we seek to reach is characterized by a desire to “stay like a local” within a unique hospitality experience. This audience is composed of those who use Internet technology and emerging social media tools to research, purchase and plan their travel.

The Mayor’s Hospitality Summit codified the notion that **the new Philadelphia story has the power to attract a completely new type of visitor to the region**, while also recognizing that this person lives, buys, socializes and researches travel online only. To win over these potential visitors, Philadelphia had to develop a new kind of marketing using the tools these consumers know and love, and we had to move quickly to capitalize on the “perfect storm” of influential publicity the city has been enjoying. We worked with Philadelphia-based agency Red Tettemer to develop the campaign’s creative.

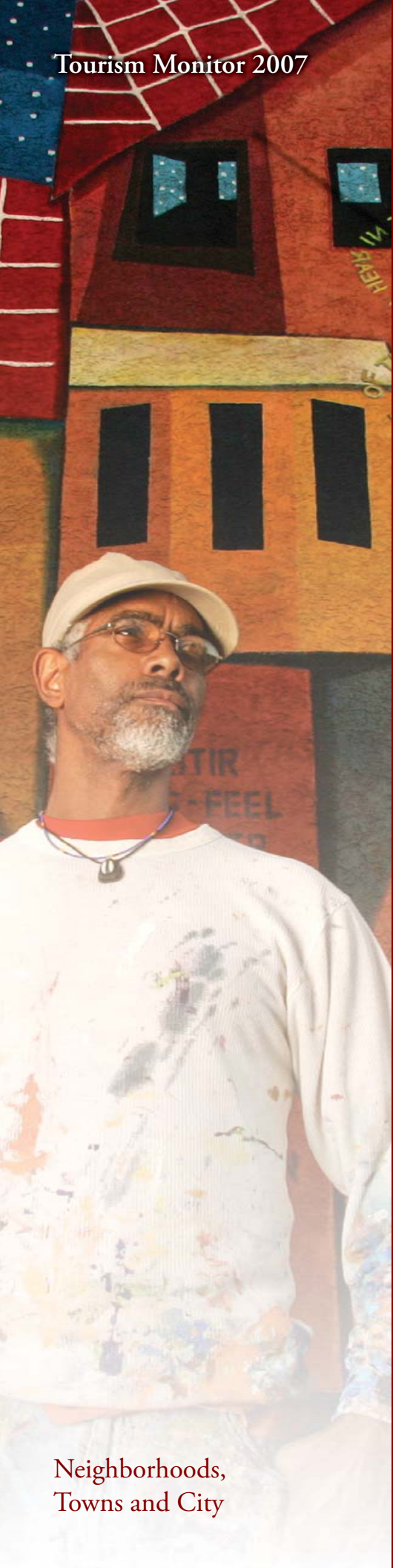
### Goals for uwishunu™

- To **build Philadelphia’s image** as a hip urban destination in order to shift opinion and spark conversation about the city among this target demographic, luring new visitors as a result of the new story
- To use blogs, citizen journalism, partner microsites, Internet advertising and marketing, social media, unusual outdoor creative and one-on-one marketing to **speak directly to this target consumer** in the particular patois that is the Internet-savvy urban explorer’s native language
- To encourage and facilitate **an ongoing conversation at uwishunu.com**, where insider Philadelphians are inviting visitors into the city by revealing the best of our unconventional assets and attractions
- To **generate revenue and economic impact** via **uwishunu™** travel products (hotel packages; Hip Hotel Room Makeover; partnerships with Live Nation, *Black Lily Film & Music Festival*, World Café Live, *POPPED! Philly Festival*, etc.)

### uwishunu™ Campaign Elements

- **A blog (uwishunu.com)** that tells the insider story and invites others to post their own stories
- **A domestic and international marketing campaign**—executed in partnership with the PCVB—that focuses on the people and experiences that define a **uwishunu™** kind of place
- **A Web-based television series, *Illadates***, that follows a real Philadelphia couple—Mark and Audrey—on their exploratory dates in the city’s “insiderest” neighborhoods
- **A Hip Hotel Room Makeover**—room 414 at The Westin Philadelphia—where local designers created everything from the mural behind the bed to the soap holders in the bathroom
- **Strategic partnerships** with festivals and events like *South by Southwest*, *Philadelphia Live Arts Festival & Philly Fringe*, *First Person Festival of Memoir and Documentary Art* and others





**uwishunu™ Outcomes**

First, there is the publicity. The primary goal of **uwishunu™** is to build the image of Philadelphia as a place of, for and by hipsters, and judging by the press, it is working.

- “Now that Williamsburg, Brooklyn’s oft-hated haven of hip, is home to glass-front condos and investment bankers, what to do, young T-shirt designer, what to do? Maybe you should move to Philly....So many people from New York and beyond are showing up to see what all the fuss is about.” – *NYLON*, November 2006
- “In this city, the art world doesn’t dance to the beat of a hyped-up market. Unlike New York and Los Angeles, where there are waiting lists for paintings with six-figure price tags and dealers pick and choose whom they’ll deign to sell to, the art scene is more accessible, and certainly more fun.” – *The New York Times*, November 19, 2006
- “Philadelphia is a city of neighborhoods, and neighborhood bars. With a condo boom and a growing hipster population, Center City and many adjacent areas have been transformed by trendy tapas joints, indie music hangouts, gastropubs and martini bars.” – *The Washington Post*, December 20, 2006

Image building is not just for image building’s sake, however. Getting people to sleep over or move to Greater Philadelphia is an explicit goal of the campaign.

- A **uwishunu™**-inspired hotel package was developed to appeal to tech-savvy, creative travelers, more than 2,000 of whom were surveyed by GPTMC in order to tailor the package to their interests. Since the package’s debut in March 2007, about 100 room nights per month have been sold at an extremely high average daily rate of \$373.
- A survey on **uwishunu.com** invites readers of the blog to tell us what impact the insider perspective on the Philadelphia region has had on them. 83% of those who live outside of the region reported that they were more interested in visiting, going to school in or moving to Philadelphia after visiting **uwishunu.com**.

**uwishunu.com Raising Interest in Philadelphia**

After visiting uwishunu.com, are you more interested in checking out Philly?

Yes, as a place to visit	57%
Yes, as a place to live	23%
Yes, as a place to go to school	3%
No, but the site is cool	10%
No, I’m not interested in Philly right now	7%

Source: Smith Travel Research

## Historic Philadelphia

Research conducted during the summer of 2006 revealed that visitors to “America’s most historic square mile” did not realize the modern vibrancy of the district they were in. Visitors from outside the region rated the area as only “fair” in the categories of dining and shopping when, in fact, it has some of the best dining and coolest shopping in the city.

The research shined a spotlight on what many individual sights and attractions in the area had been feeling: **Tourists did not view this area as a distinct district or place.** Instead, they saw it as a collection of historic sights and had difficulty making a total tourist experience out of it all. This finding gave us the perfect opportunity to use marketing and partnerships to generate a sense of place around an area that had **all the right ingredients, but none of the right connectors.**

GPTMC sought and received a grant from the Commonwealth of Pennsylvania’s Department of Community and Economic Development to create a plan to help visitors access and experience more of the city’s historic area. Working with a steering committee of sights in the historic area and a larger partnership of neighborhood stakeholders, we conducted research, engaged in a design process and developed an identity, a logo and marketing tactics for the area.

Through partner brainstorming and working with the advertising and design firm of Caspari McCormick, we identified the name **Historic Philadelphia** and the accompanying creative treatment for that name:

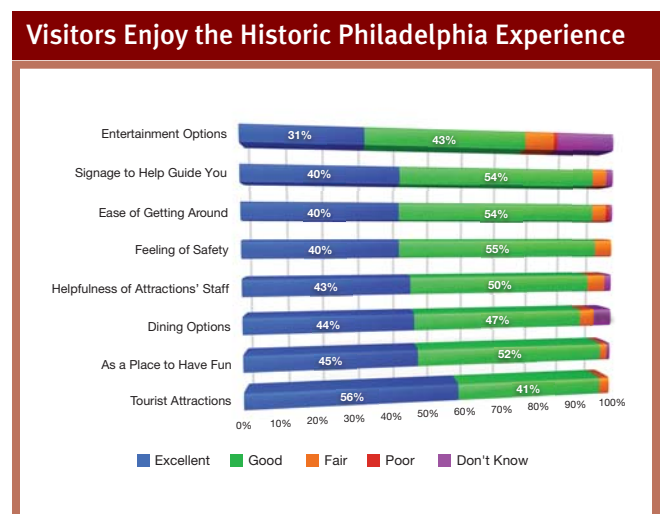


By using the **Historic Philadelphia** name and logo, museums, historical sights, restaurants, shops, pocket museums and whole neighborhoods can market themselves individually while aligning themselves with a larger tourist district. In this way, individual sights and attractions will be transformed from “one-off” places for tourists to visit into part of a larger tourist district. The name **Historic Philadelphia** is used to signal to visitors that the neighborhood that they are in is part of a larger area that provides a full tourist experience.

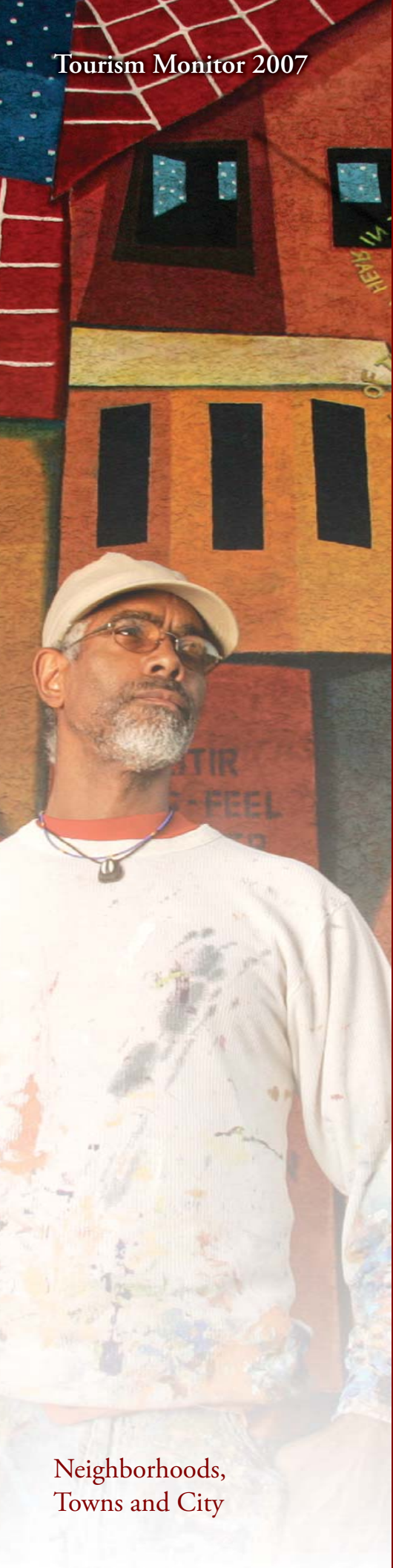
Based on the planning for **Historic Philadelphia**, GPTMC received a grant from Governor Rendell for summer 2007 to put into action a number of marketing tactics:

- **Improving circulation of visitors** from the iconic historic sights to the smaller sights and streets of **Historic Philadelphia** through a trolley loop
- **Educating visitors about all there is to see and do in Historic Philadelphia** through a video that highlights the various neighborhoods of the area and what they offer. The video is shown on the Historic Philadelphia Trolley Loop and on the Philadelphia Visitor’s Channel in downtown hotels.
- **Raising visitors’ expectations about the range of activities** (and the amount of time and money they might want to spend) in **Historic Philadelphia** through **gophila.com** by using the logo to indicate restaurants, boutiques, pocket museums, parks and historic sights in the area
- **Motivating regional residents to spend more time exploring Historic Philadelphia** through 850,000 inserts of the *Historic Philadelphia Gazette* into 30 Greater Philadelphia newspapers
- **Encouraging news and magazine coverage** of the area to emphasize the complete picture of the experience visitors can expect, through a press kit that was distributed to more than 2,000 writers

GPTMC has been tracking these tactics all summer by surveying more than 1,000 visitors to **Historic Philadelphia**. We have seen that people are already beginning to seek out a complete trip experience within the area, which now rates highly among visitors in attributes like dining, touring and overall fun:



Source: GPTMC survey of Historic Philadelphia visitors, 2007



Visitors to **Historic Philadelphia** report that more than half of their spending takes place in the area:

#### Visitor Spending in Historic Philadelphia

Category	Average Trip Spending	Spending within Historic Philadelphia	% within Historic Philadelphia
<b>Total</b>	<b>\$707</b>	<b>\$392</b>	<b>54%</b>
Hotels*	\$151	\$58	38%
Dining	\$223	\$141	63%
Shopping	\$169	\$105	62%
Other Expenses	\$163	\$89	54%

\* Hotel spending is averaged for all visitors, both those who stayed in a hotel (49%) and those who did not (51%).

Source: GPTMC survey of Historic Philadelphia visitors, 2007

Our findings also indicate that visitors are ready to embrace the name **Historic Philadelphia**:

#### Visitors are Embracing “Historic Philadelphia”

	Familiar with Name	Think it is the Best Name for the Area
Historic Philadelphia	88%	56%
Independence Mall	74%	19%
Old City	61%	19%
Society Hill	57%	3%
Other	3%	1%

Source: GPTMC survey of Historic Philadelphia visitors, 2007

#### Historic Philadelphia Trolley Loop

- The Historic Philadelphia Trolley Loop transported more than 10,000 riders in its first season of operation.
- 29% of visitors intercepted in **Historic Philadelphia** reported that they had used or intended to use the trolley, and 78% were aware of its existence.

## Boundless Philadelphia™

With the support of the William Penn Foundation and the Commonwealth of Pennsylvania, GPTMC debuted the **Boundless Philadelphia™** campaign in the summer of 2006. The campaign is designed to show off Greater Philadelphia's outdoor assets and targets both visitors and residents of the Philadelphia region. The campaign makes a direct sell to outdoor enthusiasts through ad placements in sporting magazines, but it is also charged with increasing the visibility of Greater Philadelphia's outdoor offerings to mainstream travelers and regional residents.

The campaign's Web presence is split in order to appeal to both the outdoor enthusiast and a general audience:

- **boundlessphiladelphia.com** provides events, features and video content designed specifically for the outdoor enthusiast who plans travel around outdoor events. There were more than 30,000 visits from 48 countries in the summer of 2007.
- The outdoor section of **gophila.com** (**gophila.com/outdoor**) presents outdoor experiences for a general audience, focusing on permanent regional outdoor sights and attractions. More than 300,000 users have visited the outdoor section of **gophila.com** since it was launched in May 2006.

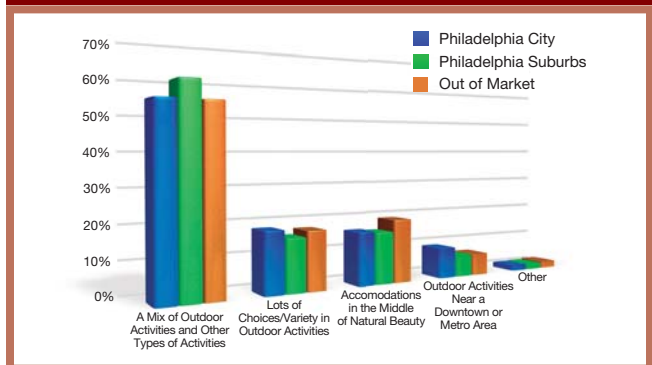
In addition, the campaign has a media presence, including:

- A branded **Boundless Philadelphia™** microsite created by Rodale Inc., a leading media outlet for outdoor enthusiasts
- Campaign includes **Boundless Philadelphia™** ad units rotated throughout runnersworld.com, bicycling.com and backpacker.com featuring information about biking, running, hiking and kayaking in **Philadelphia and The Countryside®**
- Promotional partnerships and a presence at outdoor events, such as the *Philadelphia Distance Run*, the *Philadelphia Marathon* and the *Commerce Bank Triple Crown of Cycling*

In preparation for the **Boundless Philadelphia™** campaign in the spring of 2006, GPTMC conducted an extensive audit of more than 300 outdoor sights to identify the region's outdoor assets in order to create resources for the visitor. In addition, GPTMC commissioned TNS Travel & Transport to conduct a survey in Mid-Atlantic travel markets to gauge the perception of Philadelphia as an outdoor destination. For 2007, GPTMC asked TNS to repeat the study using a sample of residents from the Philadelphia region, which was the focus of the campaign in summer 2006.

When asked what features of an outdoor vacation were most important to them, regional and out-of-market respondents alike overwhelmingly chose "a mix of outdoor activities and other types of activities."

### Visitors Want a Mix of Activities

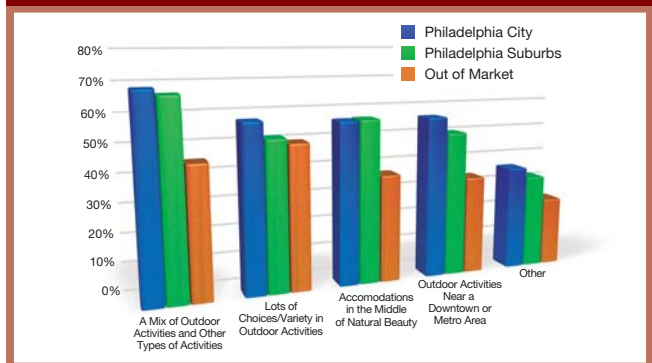


Source: TNS Greater Philadelphia Outdoor Perception Surveys, 2006-2007

**Travelers' desire for a mixed experience** on their outdoor vacation dovetails with the way **Boundless Philadelphia™** has positioned the Philadelphia region. The sell to outdoor travelers is not simply the many parks and sights available to them, but **the opportunity to switch back and forth between urban and countryside destinations**, creating an experience that links the built environment with nature.

When respondents were asked to evaluate the outdoor offerings of the Philadelphia region, a clear difference emerged between out-of-market respondents, who judged the region on the basis of reputation, and regional residents more familiar with the area.

### Perceptions of Greater Philadelphia as an Outdoor Destination



Source: TNS Greater Philadelphia Outdoor Perception Surveys, 2006-2007

This gap in perception between regional and out-of-market residents (our potential tourists) underscores why it is important for GPTMC to spread the Boundless message. The interconnectedness of urban and outdoor experiences in the Philadelphia region is a potentially powerful message to expand the appeal of the region.

## VI. ATTRACTIONS, EXHIBITIONS AND SIGHTS

“...wherever we find a city district with an exuberant variety and plenty in its commerce, we are apt to find that it contains a good many other kinds of diversity also, including variety of cultural opportunities, variety of scenes, and a great variety in its population and other users.”

– Jane Jacobs, *The Death and Life of Great American Cities*

Our conversations with travelers have taught us that visitors choose a destination not only for its specific attractions, but also because of the reputation of the place generally. Visitors need a hook to come to Greater Philadelphia, which can range from a historic re-enactment in Valley Forge to a Phillies game at Citizens Bank Park to the blockbuster exhibition *Tutankhamun and the Golden Age of the Pharaohs* at The Franklin Institute. That hook will not be enough, however, unless they feel that the city and region in which these attractions live—the place—is attractive and compelling to them.

**Visits to attractions, exhibitions and sights are transformed into an experience of place as people’s familiarity with the region develops.** Visitors experience their trips differently depending on whether they are coming to the Philadelphia region for the first time or on a subsequent visit. Our hotel visitor surveys have shown us, for instance, that visitors who come four or more times in the same year spend more time (and money) shopping and dining and less time seeing the sights. They become insiders, and their experience of the Philadelphia region is an experience of the complete place, not individual sights.

Many of our visitors, however, are first-timers, and their trips are often shaped by our regional attractions, exhibitions and sights. These key tourism assets are the focus of this section. Visitors with different backgrounds, expectations and familiarity with the region choose to do different activities, and this reality helps to define their conception of what kind of place our region is.

Keeping track of how our attractions are doing and which types of travelers are enjoying which types of activities is also important information for marketing:

- Paying attention to who is going where and enjoying what helps GPTMC to produce specific, personalized invitations to key visitor segments, positioning the region in relevant ways for specific audiences.
- The hospitality industry is many industries rolled into one. In order to understand the industry, we need data on our hotels, attractions, restaurants, museums, entertainment venues and even our city sidewalks and region’s main streets. Data on attractions, exhibitions and sights give us a fuller picture of how our industry is doing.
- Blockbuster exhibitions, beginning with *Cézanne* in 1996 and continuing through *Titanic*, *Body Worlds*, *Dalí* and most recently *Tut*, have produced significant economic impact for the region. Their successes have made Greater Philadelphia home to the blockbuster exhibition, raising the region’s image, visitation numbers and economic well-being.

## The Big Numbers

Greater Philadelphia's historic attractions remained our top draw in 2006. Together, Independence National Historical Park and Valley Forge National Historical Park welcomed more than 14.6 million visitors. The Philadelphia Zoo, the National Constitution Center and The Franklin Institute all benefited from strong programs in 2006 to top the 1,000,000 visitor mark as well.

Top Greater Philadelphia Tourist Attractions, 2006

	Attraction	2006 Attendance
1	Independence National Historical Park	7,990,019
2	Valley Forge National Historical Park	6,616,424
3	Peddler's Village	3,000,000
4	Philadelphia Zoo	1,200,000
5	National Constitution Center	1,100,000
6	Adventure Aquarium	1,000,000
7	Penn's Landing	1,000,000
8	The Franklin Institute	1,000,000
9	Longwood Gardens	817,198
10	Philadelphia Museum of Art	776,023

Source: Philadelphia Business Journal

The Liberty Bell Center is the top attraction at Independence National Historical Park, and attendance at the Bell was very strong in the summer of 2007, up 19.3% from the summer of 2006.

Liberty Bell Center Attendance, Summer 2006-2007

Month	2007	2006	% Change
June	230,668	200,454	15.1%
July	296,673	245,822	20.7%
August	269,989	222,008	21.6%
<b>Total</b>	<b>797,330</b>	<b>668,284</b>	<b>19.3%</b>

Source: National Park Service

Valley Forge National Historical Park also saw a 22% increase in visitation for summer 2007 over summer 2006.

## Repeat Visitors Have Made Greater Philadelphia Their Place

Repeat visitors have emerged as a distinct visitor segment in the hotel visitor surveys that GPTMC has conducted over the past four years. Travelers who come to the region multiple times in the same year behave more like locals than tourists:<sup>10</sup>

- Repeat visitors are less likely to visit our iconic historic attractions such as the Liberty Bell Center and Independence Hall (because they have already seen them). While many still frequent museums, they are less museum-focused on their visits than first-time visitors.
  - These frequent visitors are much more likely to attend concerts, professional sporting events and plays during their stays.
- Repeat visitors are a loyal and stable segment. In focus groups, these visitors describe using Philadelphia as a kind of "home away from home" where they rejuvenate and have a chance to explore art, culture and dining that they might not have at home. Most visitors (65%) who come to Greater Philadelphia for a getaway four or more times a year are coming back again in the next three months.

Greater Philadelphia's Loyal Visitors Keep Coming Back

Intent to Return to Philadelphia	Overnight Stays in the Past Year				
	Total	1	2	3	4+
In the Next 3 Months	23%	11%	19%	43%	65%
In the Next 3-6 Months	19%	13%	26%	33%	21%
In the Next 6-12 Months	35%	39%	44%	20%	11%
Not Planning Trip Within a Year	23%	37%	11%	4%	3%

Source: GPTMC seasonal hotel surveys, 2004-2007

<sup>10</sup> For a full report on the repeat visitor, see our Summer 2006 Hotel Survey Findings on [gophila.com/research](http://gophila.com/research).



## Key Diversity Markets

Travel involves the unfamiliar: leaving the daily routine behind and entering a place that is either brand new or less familiar than home. When people travel, they look for signs that—as strangers in a new place—they will be welcomed and feel comfortable. For this reason, engaging travelers by connecting to both individual travel interests and group identities can be important.

GPTMC creates specific invitations to our destination for African-American and Latino travelers. These invitations are based on research regarding what Latino and African-American visitors do while they are in Greater Philadelphia and what they say about their travel experiences when we talk to them in focus groups.

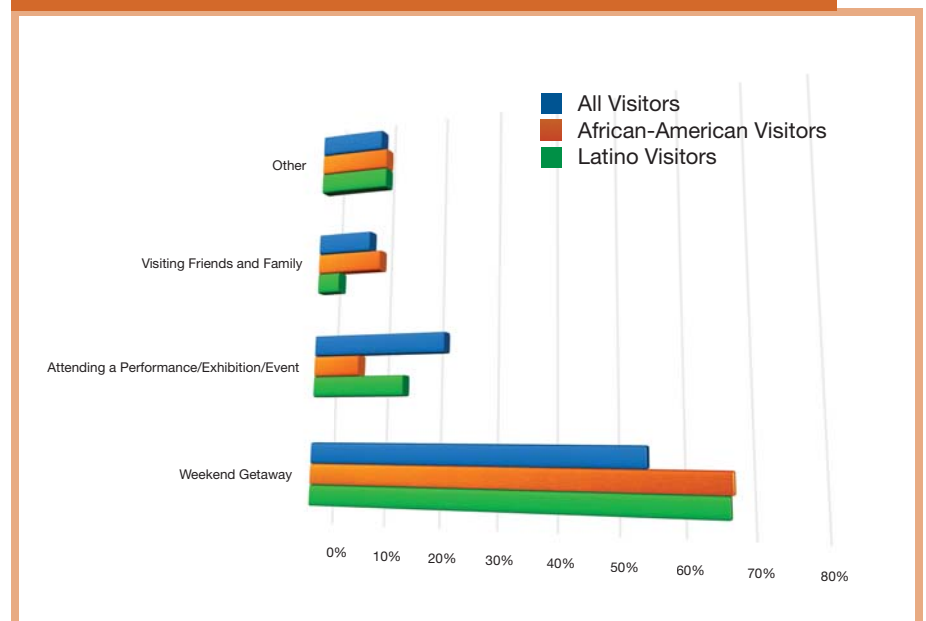
### African-American Visitors

African-American visitors who book a hotel stay on **gophila.com** are more likely to be local, regular visitors for whom a Philadelphia hotel stay is an opportunity for a general getaway or a visit with friends and relatives. Their visits tend to focus on activities like shopping rather than on sightseeing. Younger than our average visitors, African-Americans who book through **gophila.com** seek out the insider experience of Greater Philadelphia rather than the staple tourist attractions.

### Latino Visitors

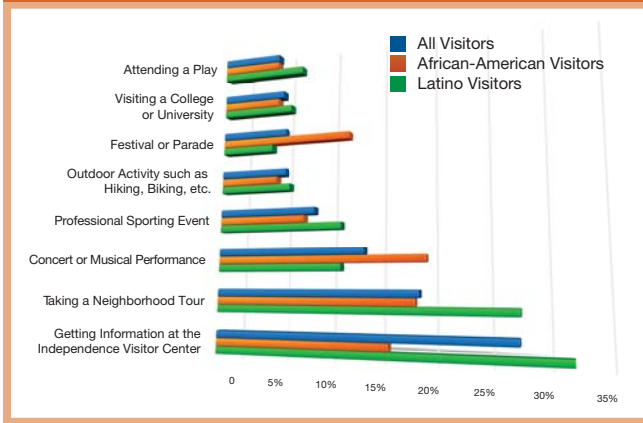
Latino visitors who book a hotel stay on **gophila.com** have action-packed trips to Greater Philadelphia, visiting more attractions and participating in more activities than any other visitor segment. They typically come for a getaway and seek out the classic tourist experience, including the Liberty Bell Center and Independence Hall. There is still significant room for growth in this market, as Latinos represent just 2.5% of our visitors booking on **gophila.com** over the past three years.

Hotel Visitors' Purpose of Stay



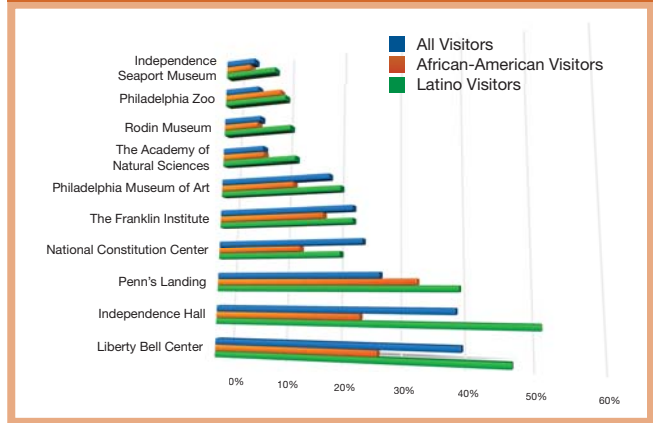
Source: GPTMC seasonal hotel surveys, 2004-2007

### Hotel Visitors' Activities



Source: GPTMC seasonal hotel surveys, 2004-2007

### Hotel Visitors' Top Attractions



Source: GPTMC seasonal hotel surveys, 2004-2007

## King Tut, the Blockbuster Exhibition

Over the past few years, Philadelphia has played host to major art, history and science exhibitions, including retrospectives on Cézanne and Dalí at the Philadelphia Museum of Art, an exhibition celebrating Ben Franklin's 300<sup>th</sup> birthday at the National Constitution Center and Gunther Van Hagens' world-renowned Body Worlds show at The Franklin Institute.

In 2007, Philadelphia welcomed the biggest blockbuster yet: *Tutankhamun and the Golden Age of the Pharaohs* at The Franklin Institute (the last stop on Tut's four-city American tour). GPTMC built on this opportunity through our typical "surround-sound" approach involving advertising, hotel offers, partnerships, public relations and [gophila.com](http://gophila.com). GPTMC partnered with The Franklin Institute on a \$1.3 million advertising push throughout the Northeast, featuring:

- Posters on Amtrak trains and in stations
- Radio spots
- Cinema advertising
- Out-of-home advertising (billboards, posters)

In partnership with The Franklin Institute and GPTMC, 15 area hotels offered a **King Tut Hotel Package**, which included an untimed VIP ticket to the exhibition. The package sold more room nights than any other exhibition-linked offer in GPTMC history.

Through September 2007:

- 21,524 Tut packages have been sold.
- 28,264 room nights have been filled.
- An estimated \$6.5 million in hotel revenue was earned.

In partnership with the PCVB and American Tours International, GPTMC created a Philadelphia Heritage and Art tour for AAA and CAA (Canadian Automobile Association) consumers highlighting the King Tut exhibition. AAA sold 1,045 packages, bringing more than 2,500 individuals to the show.

GPTMC also used public relations and partnerships to brighten and extend the spotlight created by the exhibition and keep it shining on the whole region:

- An "Egypt-a-delphia" sand sculpture was erected in Franklin Square.
- A "geocaching" treasure hunt incorporating Global Positioning System (GPS) technology led people around the city in a Tut-themed adventure that exposed them to Philadelphia beyond the walls of the exhibition.
- The "Go Golden" program linked restaurants, shops and attractions throughout the region to the exhibition. The program provided signage, a Web presence on [gophila.com](http://gophila.com) and a brochure that told visitors where they could receive discounts throughout the region by showing their exhibition ticket stub.

Through this multi-pronged approach, GPTMC was able to connect different industries and different parts of the city back to the King Tut exhibition and allow the entire region to bask in the spotlight created by the blockbuster event. GPTMC is working with The Franklin Institute, Temple University School of Tourism and Hospitality Management and Urban Partners to produce a comprehensive report on the economic impact of the exhibition.

## CONCLUSION: MORE MARKETING MEANS MORE IMPACT

Tourism's effectiveness in the region adds to everyone's bottom line: from the taxes generated for our federal, state and local economies (\$1.49 billion in 2006) to the tickets our venues sell to out-of-towners (72% of ticket buyers for the King Tut exhibition were from outside the region).

As a thriving tourist destination, Greater Philadelphia generates more than tax revenues, hotel room nights and ticket sales. All of the features that characterize a rich tourism environment benefit other sectors of our region as well.

- **Colleges and universities have an easier time attracting students** when the amenities of the region include great hotels, wonderful entertainment venues and fantastic restaurants.
- The City of Philadelphia, our surrounding counties, area businesses and economic development organizations have an easier time **attracting new businesses and workers** when all the amenities available here are described to prospects.
- **Our residents benefit most of all**, with more to do, enjoy and value in their hometown. Civic pride, quality of life and resident satisfaction all increase when Greater Philadelphia appears on top 10 lists of places to visit and when new retail establishments and attractions are added to the region's offerings.

Successful tourism marketing, along with the additions of attractions, restaurants and shops, has raised the number of tourists visiting and the amount they spend in the region. This, in turn, has attracted more venues, exhibitions, retail establishments and hotels to set up shop or expand. GPTMC now has more to market than ever and more opportunity to build on tourism's impact so far.

In the coming year, GPTMC will continue to use our tracking mechanisms and our strategic insights to guide our marketing to yield the best outcomes. By tracking our tourism marketing programs closely, we maximize the tourism marketing investment our funders and partners make in the region.

## APPENDIX

## Research Studies Conducted in 2006-2007

## Studies Conducted by GPTMC

- *BlogPhiladelphia* Survey
- *Facts at Your Fingertips*
- “Go Golden” Participants Survey
- **gophila.com** Analytics Data
- **gophila.com** Evergreen Survey
- **Historic Philadelphia** Intercept Interviews
- In-Hotel Visitor Surveys
- My Trip Custom Itinerary Survey
- Summer Hotel Visitor Survey
- **uwishunu™** New Ways to Stay Survey
- **uwishunu.com** Site Survey
- Winter Hotel Visitor Survey

## Studies Commissioned by GPTMC

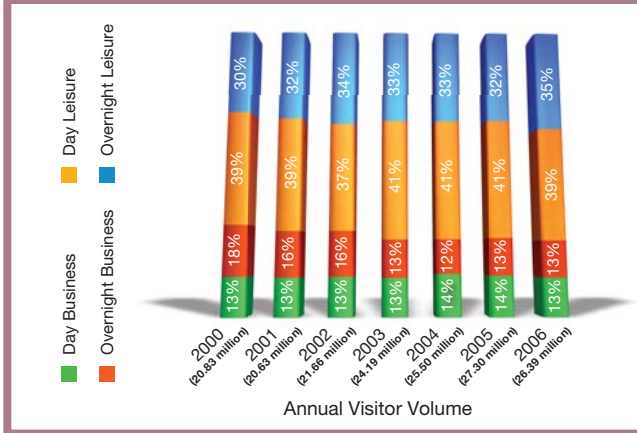
- Advertising Evaluation Focus Group (The Melior Group)
- Economic Impact of Tourism in Greater Philadelphia (Global Insight)
- Gay and Lesbian Leisure Travelers in America (TIA/Harris Interactive)
- GPTMC Strategic Plan (Consumer Insights and Brand Strategy)
- Greater Philadelphia as an Outdoor Destination: Survey of Regional Residents (TNS Travel & Transport)
- **Historic Philadelphia** Consumer Research (The Melior Group)
- **Historic Philadelphia** Marketing Audit (Eight Marketing)
- Hotel Data for Greater Philadelphia (Smith Travel Research)
- Monthly Philadelphia-area Hospitality Industry Snapshots (PKF Consulting)
- Out-of-Market Focus Groups (The Wright Group)
- Visitor Volume and Visitor Profiles for Greater Philadelphia (DKS&A)

## Research Consultants

- Maureen Craig, Consumer Insights and Brand Strategy
- D.K. Shifflet & Associates Ltd.
- Eight Marketing
- Global Insight
- Harris Interactive
- MayoSeitz Media
- The Melior Group
- Peter R. Tyson, PKF Consulting
- Scarborough Research
- Smith Travel Research
- The Star Group
- Taurus Market Research
- TNS Travel & Transport
- Judith Wright, The Wright Group

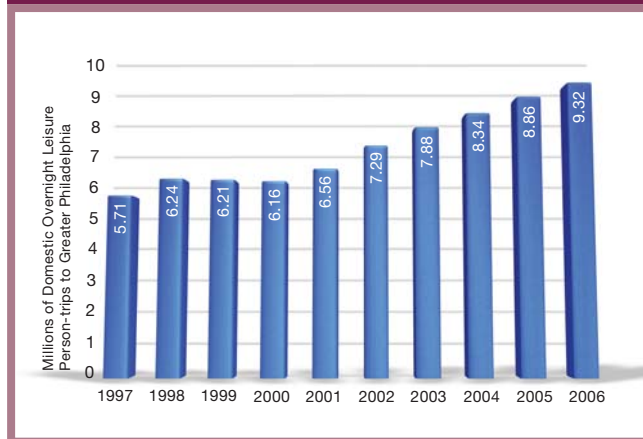
# FAST FACTS

Domestic Visitor Volume to Greater Philadelphia by Market Share, 2000-2006



Source: DKS&A

Domestic Overnight Leisure Visitation to Greater Philadelphia, 1997-2006



Source: DKS&A

What does it take to create a place like Philadelphia? Hundreds of years of hard work, innovation, originality, persistence and so much more. Our *Tourism Timeline* tracks some of the region's biggest tourism milestones over the last 20-plus years.

Visit [gophila.com/research](http://gophila.com/research) to see for yourself how the region has developed over the years.

**Greater Philadelphia Tourism Economic Impact**  
(\$ in billions, jobs in units)

Category	2006	2005	2004
<b>Spending Impact</b>	<b>\$10.44</b>	<b>\$10.08</b>	<b>\$9.66</b>
Direct Visitor Spending	\$6.00	\$5.79	\$5.58
Indirect Spending	\$1.97	\$1.91	\$1.81
Induced Spending	\$2.47	\$2.38	\$2.28
Jobs Supported	128,524	126,986	123,742
Wages Generated	\$3.97	\$3.82	\$3.65
Taxes Generated*	\$1.49	\$1.47	\$1.44

\*Federal, State and Local

Source: Global Insight

**Greater Philadelphia Leisure Tourism Economic Impact**

Category	2006	2005	2004
Spending Impact	\$6.26	\$6.05	\$5.70
Jobs Supported	77,114	76,192	73,008
Wages Generated	\$2.38	\$2.29	\$2.15
Taxes Generated*	\$0.89	\$0.88	\$0.85

\*Federal, State and Local

Source: Global Insight

**Regional Hotel Industry Facts and Figures 2006**

Hotel Supply:* 11,380,591 rooms
Hotel Demand (occupied rooms): 8,024,398 rooms
Hotel Occupancy: 70.5%
Average Daily Rate (ADR): \$121.05
Revenue per Available Room (RevPAR): \$85.35
Number of Hotel Rooms in the Region: 31,180

\*Every room occupied every night

Source: Smith Travel Research

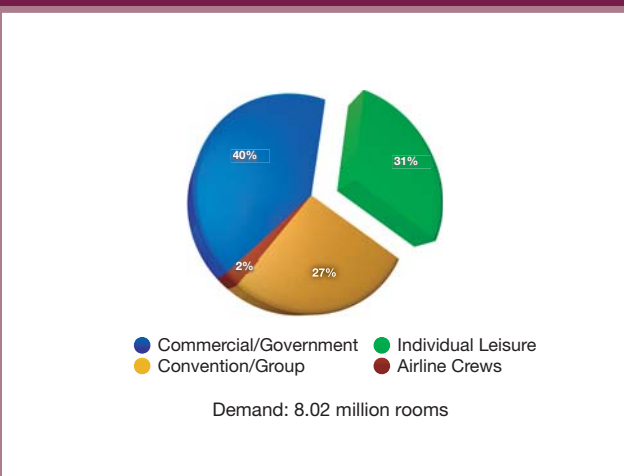
**Center City Hotel Industry Facts and Figures**

Hotel Supply:* 3,689,654 rooms
Hotel Demand (occupied rooms): 2,715,329 rooms
Hotel Occupancy: 73.6%
Average Daily Rate (ADR): \$156.34
Revenue per Available Room (RevPAR): \$115.05
Number of Hotel Rooms in Center City: 10,108

\*Every room occupied every night

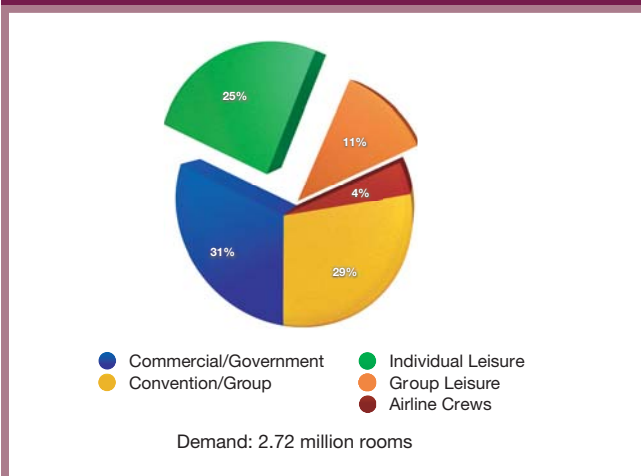
Source: Smith Travel Research

**Greater Philadelphia Hotel Market Mix, 2006**



Source: PKF Consulting

**Center City Hotel Market Mix, 2006**



Source: PKF Consulting

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