

Winter 08-09 Hotel Visitors

Report on Survey Findings

May 2009

CONTENTS

- Background and Methodology
- Visitor Demographics
- Trip Planning
- Economic Impact
- Visitor Satisfaction
- Key Insights

Background and Methodology

BACKGROUND

- Survey covers hotel bookings on gophila.com from 11.1.08 - 3.31.09
 - 2,229 hotel reservations made on gophila.com for 3,800 room nights
 - \$566,139 in revenue, with an average daily rate (ADR) of \$148.98
 - ADR for all Center City hotels was \$158.24 during this time period (Source: STR)

- Hotel rooms sold on gophila.com represent about 2% of 700,000 annual leisure hotel rooms sold in Center City. Survey findings are specific to gophila.com hotel visitors, and cannot be assumed to represent all leisure hotel visitors to Greater Philadelphia.

METHODOLOGY

- GPTMC e- mailed a survey invitation to all summer hotel visitors who booked their stay through gophila.com
- A total of **2,015 invitations** were sent out, with **223 completed** surveys for a response rate of 11.1%.
- As an incentive, respondents were offered the chance to win a \$300 American Express Gift Cheque.
- Percentages in the report are rounded, which may lead to totals above/below 100%.
- This is the 10th **consecutive season** that GPTMC has conducted a survey of hotel visitors. Each of the previous reports, along with other GPTMC research, is available for download at gophila.com/research. This report compares findings from winter 07-08 with winter 08-09 unless otherwise labeled.

Visitor Demographics

HOTEL VISITOR DEMOGRAPHICS



- Visitor demographics continue to show that our hotel visitors are upper income and middle-aged.

	Winter 2008-09	Winter 2007-08
Average Age	46.7 years	43.3 years
Average Household Income	\$109,754	\$110,798
Gender	52% female	60% female
Race		
Caucasian	87%	88%
African-American	4%	6%
Asian-American	2%	3%
Hispanic/Latino	2%	2%
Other/Choose not to report	5%	1%

TRIP CHARACTERISTICS

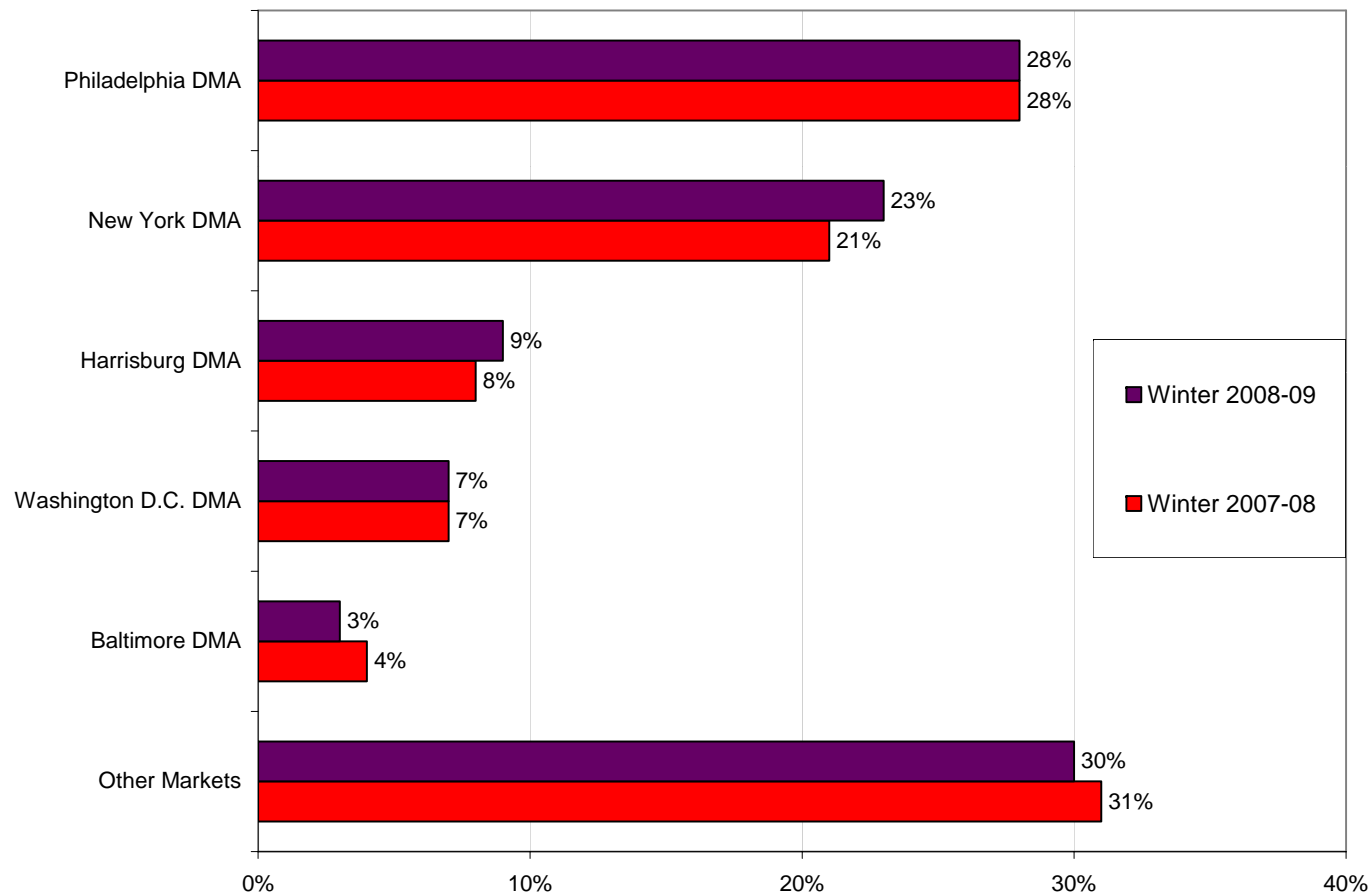


- Winter visitors who book on gophila.com average a stay of a little less than two nights and almost always stay in Center City (97%).

	Winter 2008-2009	Winter 2007-08
Party Size	2.38 people	2.57 people
Length of Stay	1.81 nights	1.72 nights
Location of Hotel Stay	97% downtown	95% downtown
Mode of Arrival		
Car	85%	87%
Train	6%	5%
Plane	3%	5%
Other	5%	3%

GEOGRAPHY

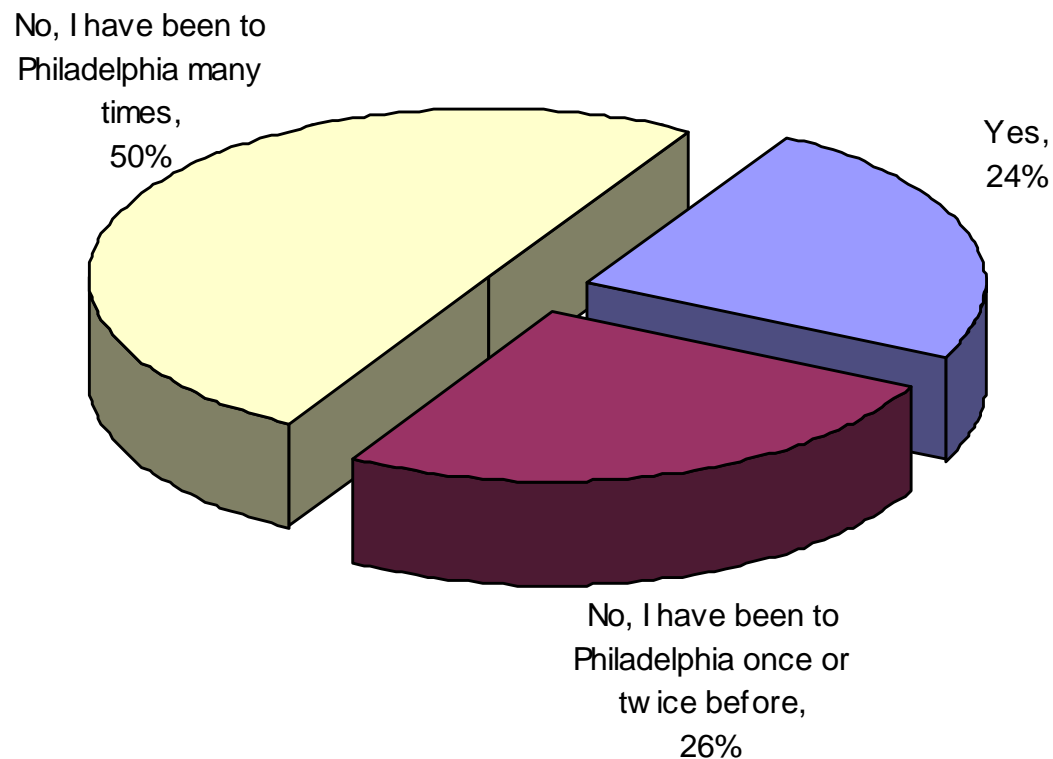
- More than half of winter visitors originated from the Philadelphia or New York DMAs, in line with our usual top markets.



Q: Please tell us your home zip code:

REPEAT VISITORS

- Half of respondents had been to Philadelphia many times before, while about one quarter of respondents called this their first trip.



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

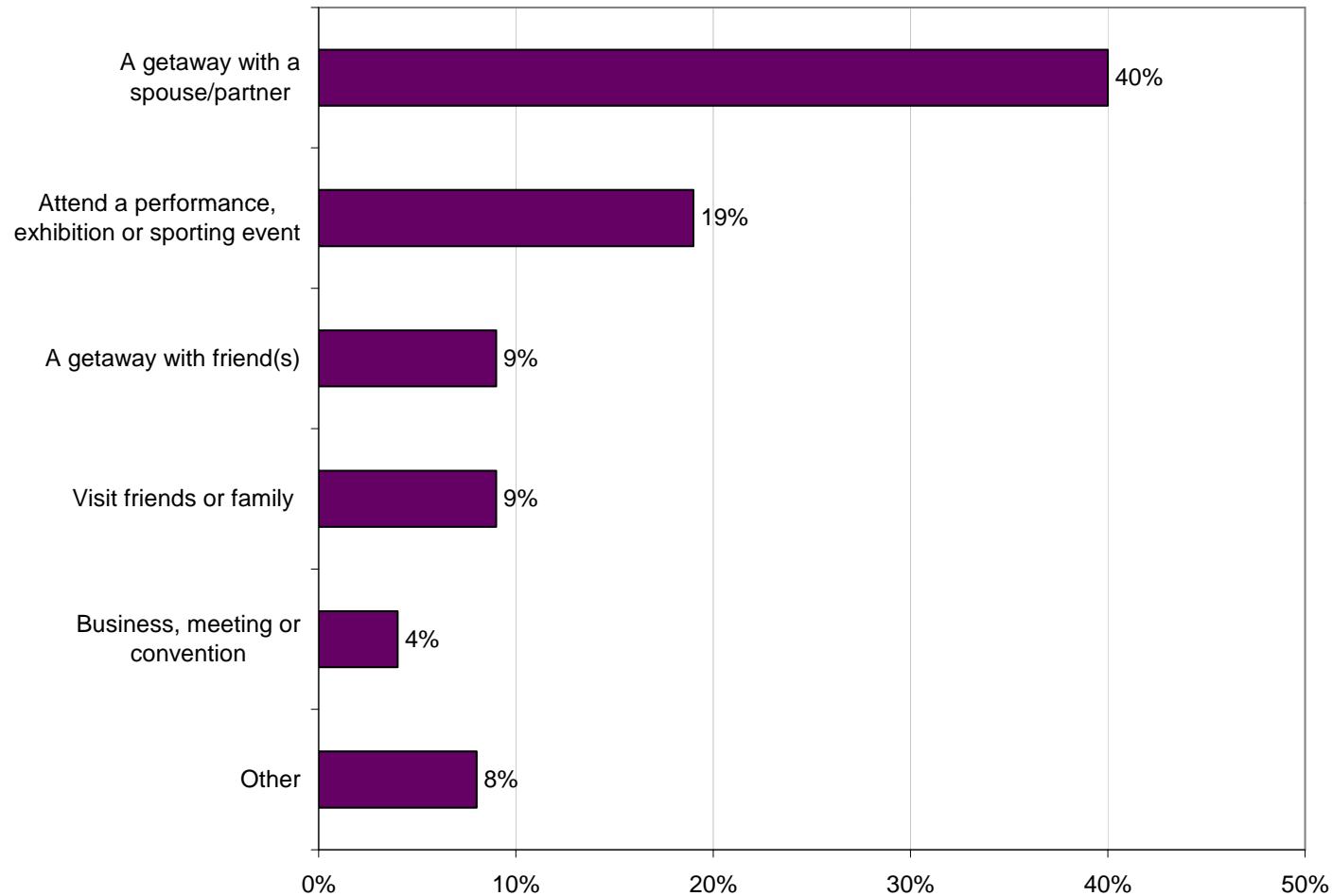


GPTMC

Trip Planning

PURPOSE OF VISIT

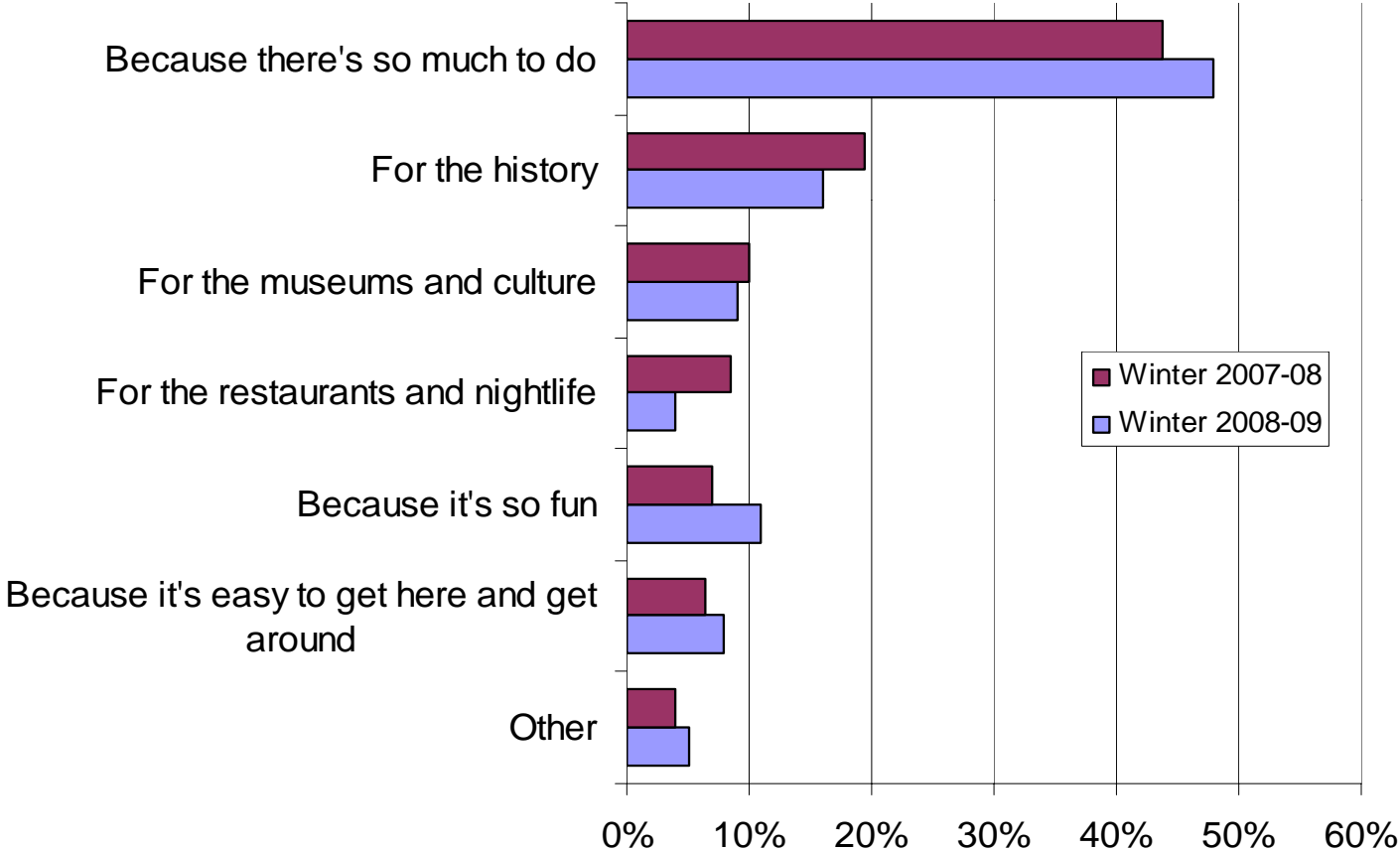
- A getaway with a spouse or partner is the leading reason for booking a gophila.com hotel stay in Philadelphia.



Q: What was the main reason for your visit to Philadelphia this winter?

REASON TO VISIT

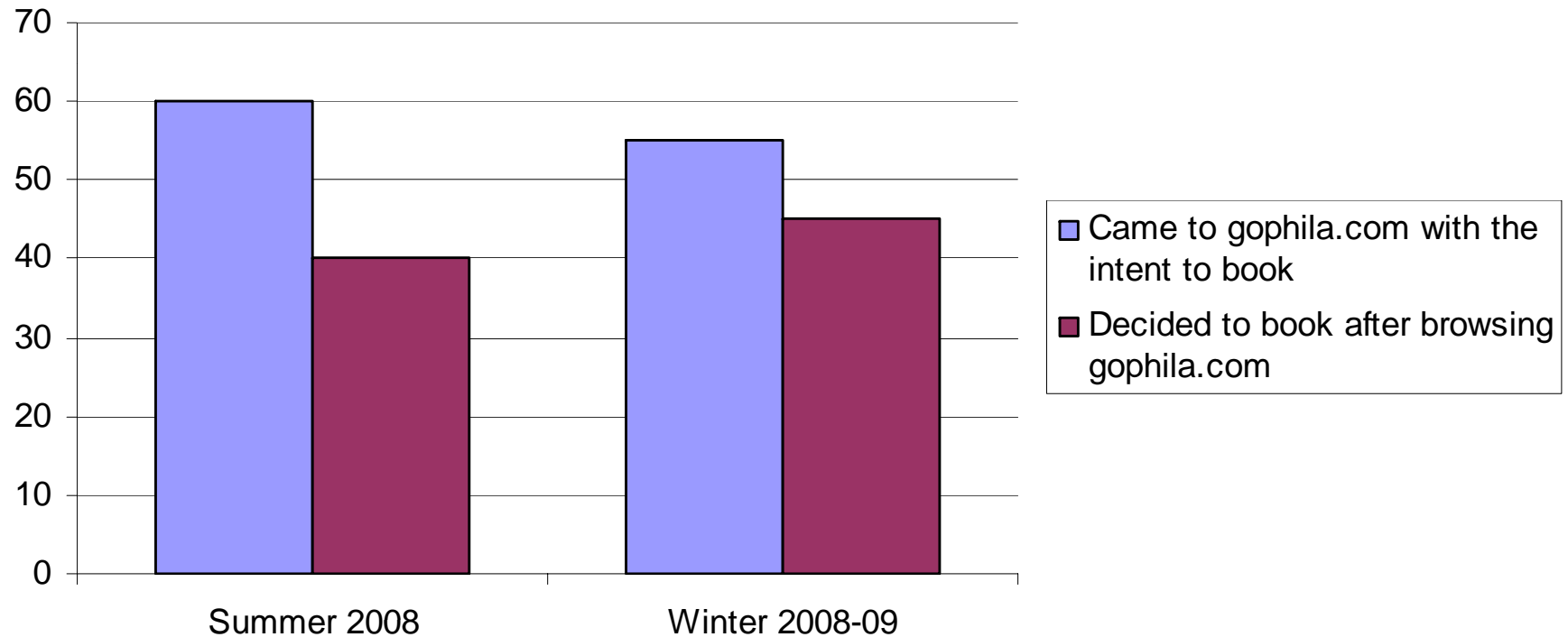
- “So much to do” is still the leading reason people offer for visiting Philadelphia.



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

GOPHILA.COM BOOKING EXPERIENCE

- Among those who booked hotel rooms on gophila.com in winter 2008-09, the percentage of people who visited gophila.com with the intent to book decreased by 5% from summer 08.



Q: Which of the following best describes what you did on gophila.com?

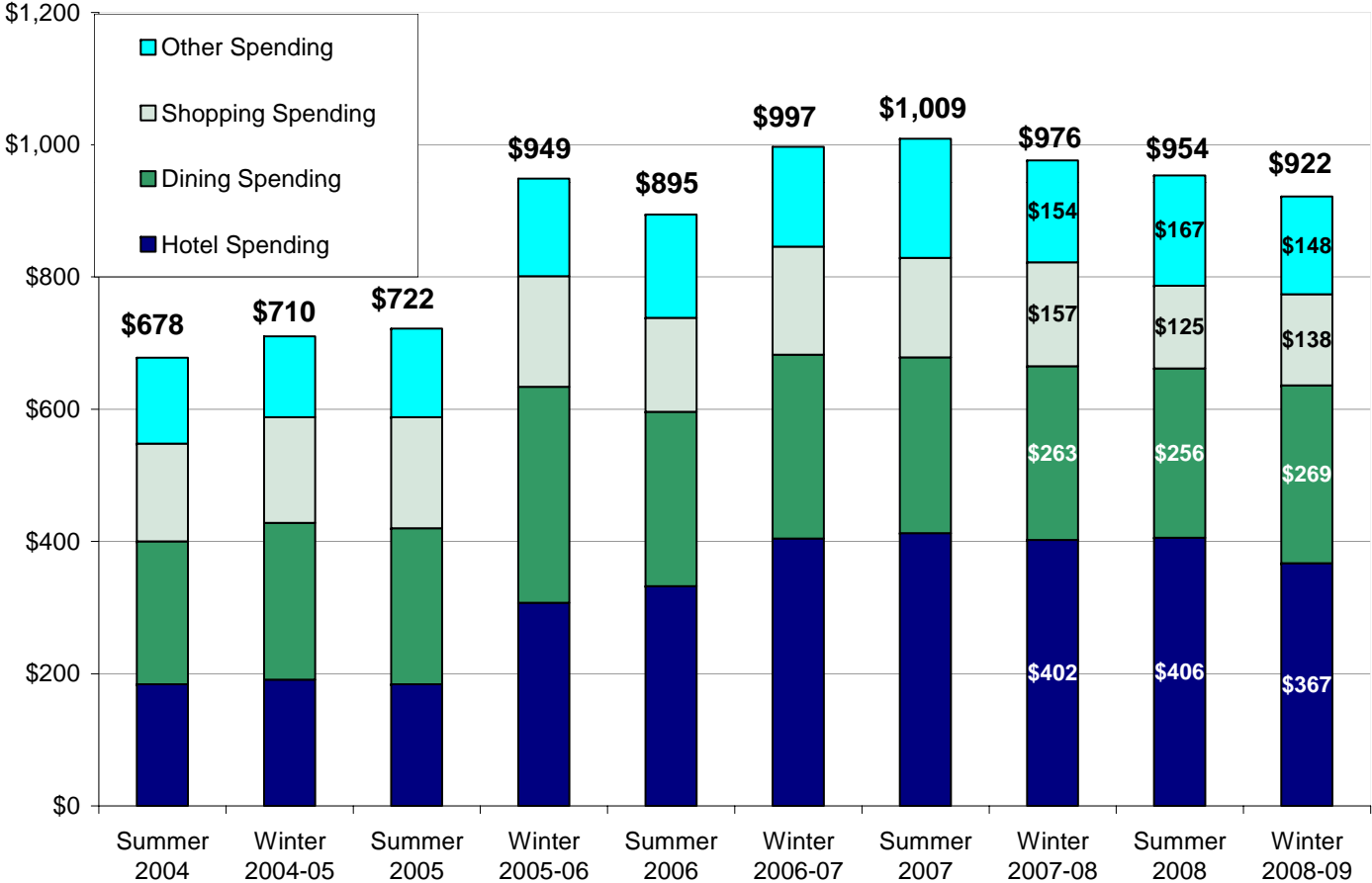


GPTMC

Economic Impact

VISITOR SPENDING

- Total spending in Winter 2008-09 decreased 6% from Winter 2007-08 driven by less hotel and shopping spending. Hotels remain the largest expenditure for tourists during their stay.

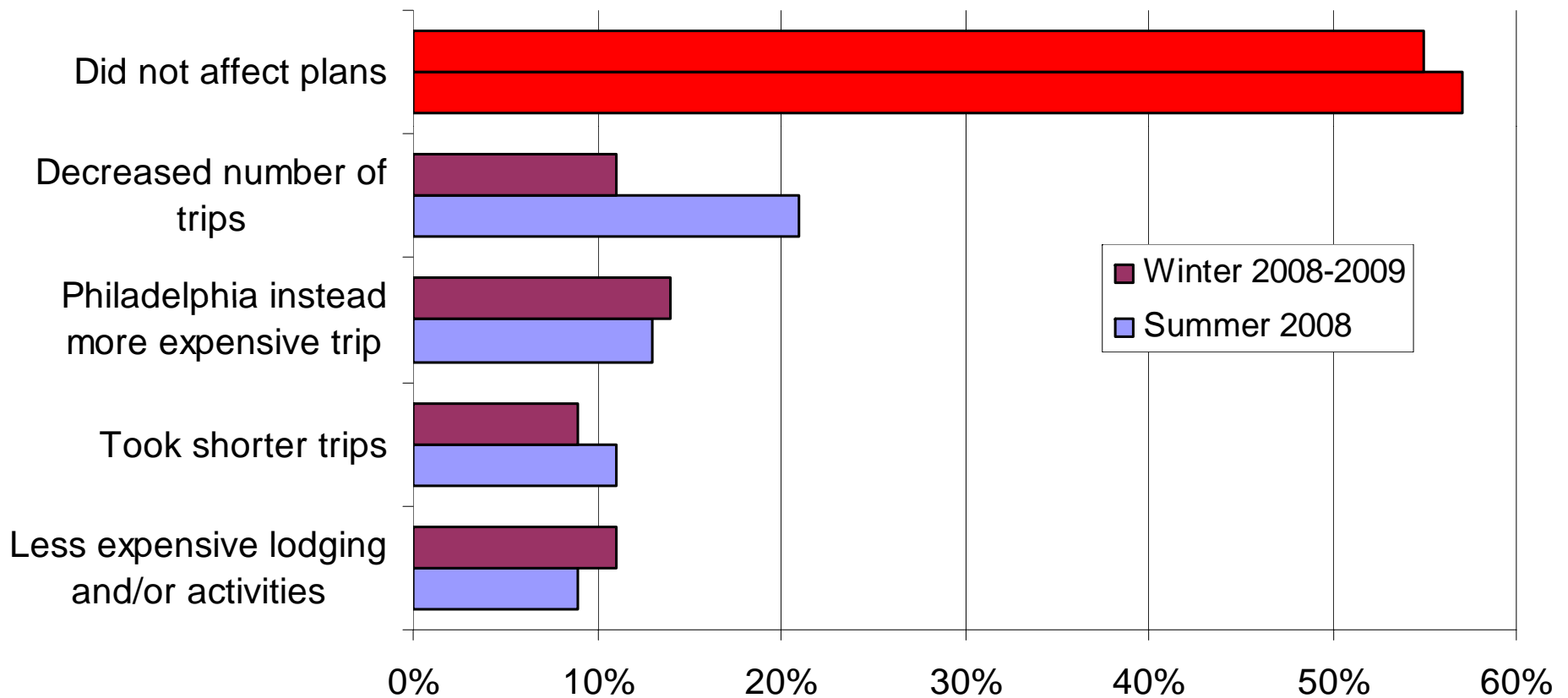


Spending is calculated per party per two night visit

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

IMPACT OF ECONOMY ON PAST TRAVEL

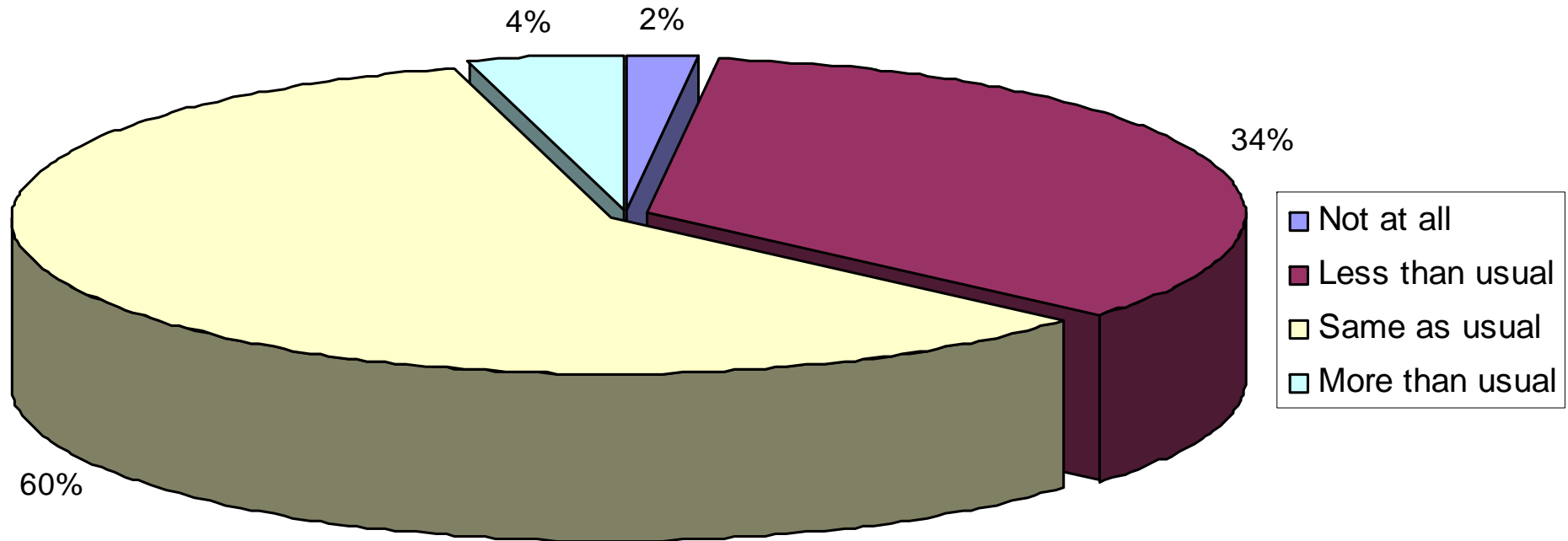
- The percentage of respondents decreasing the number of trips they are taking due to economic concerns dropped from summer 08.



Q: How did economic conditions affect your travel plans this season?

IMPACT OF ECONOMY ON FUTURE TRAVEL

- While one in three people plan to travel less than usual this summer due to the economy, close to two in three say they plan to travel the same as usual or more than usual.



Q: Given the state of the economy, how much do you plan to travel this summer?

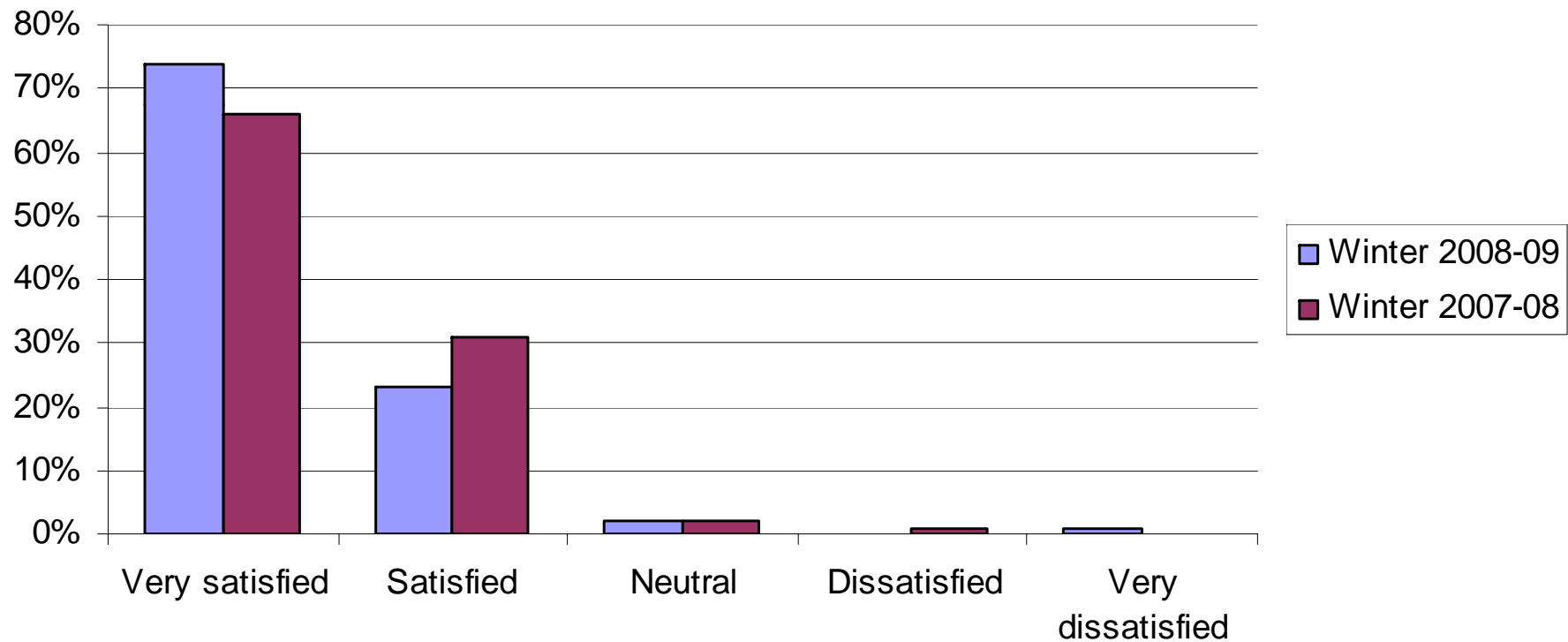


GPTMC

Visitor Satisfaction

TRIP SATISFACTION

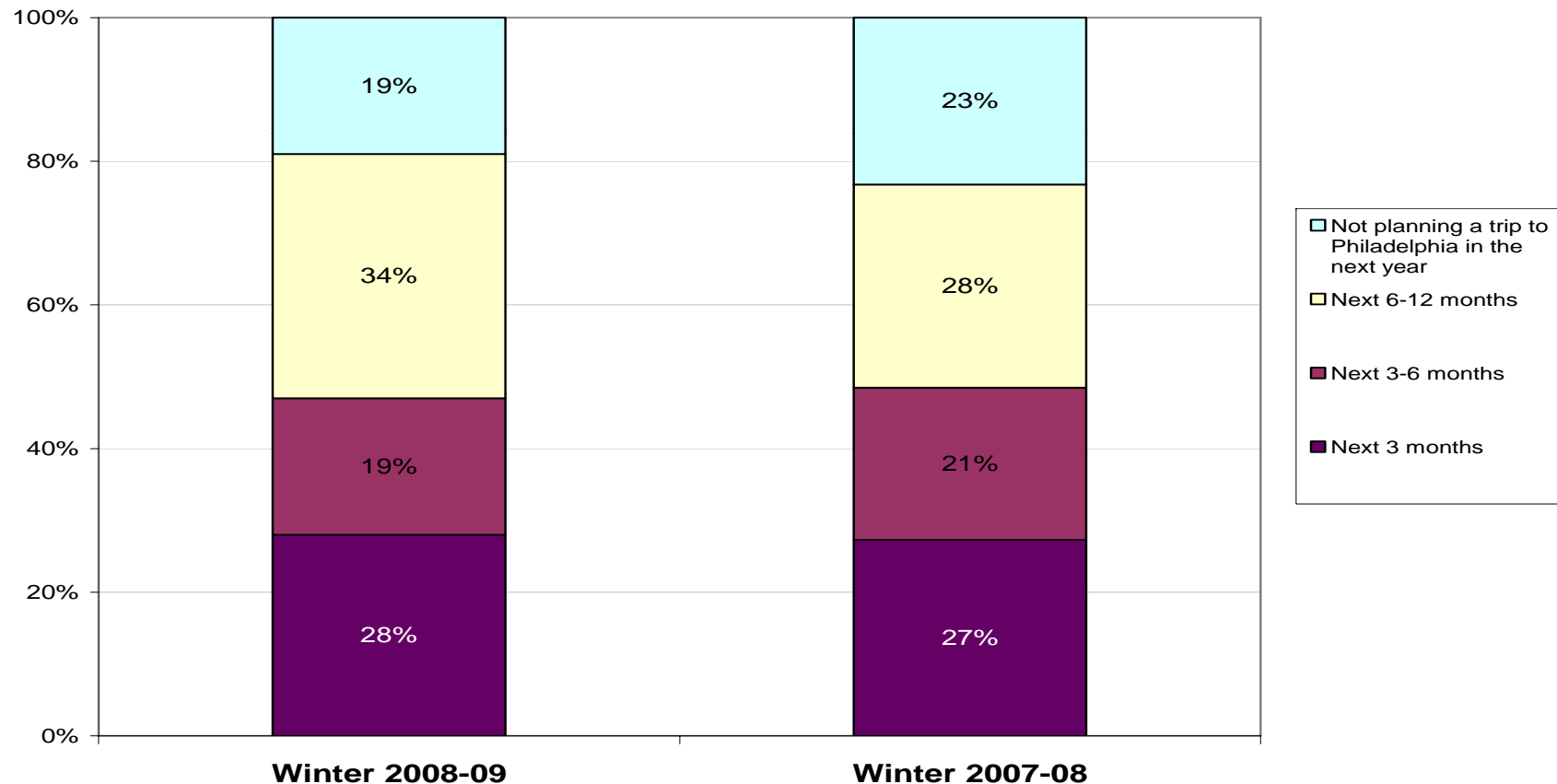
- Winter 2008-09 witnessed an increased percentage of visitors experiencing high levels of satisfaction than the prior year.



Q: Overall, how satisfied were you with your trip to Philadelphia?

INTENT TO RETURN

- The percentage of respondents planning a return trip to Philadelphia in the next twelve months increased 5% from the winter 2007-08 survey.



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

Executive Summary

- Survey results continued to show that visitors who booked on gophila.com were...
 - *Upper income*
 - *Middle-aged*
 - *Likely to stay in Center City.*
- Half of visitors have been to Philadelphia many times before, and slightly more than half originated from the Philadelphia or New York DMAs.
- 40% of visitors were taking a getaway with their spouse or partner.
- “Because there’s so much to do” and “ Because it’s so fun” increased as reasons visitors would offer their friends for coming here.
- Overall trip spending dipped 6%
 - Visitors spent 30% of their total budget on dining.
- More than one third anticipated scaling back their travel plans summer 09.
- Despite this, more than four in five anticipated taking a return trip to Philadelphia in the next twelve months.