

Winter 2007-08 Hotel Visitors

Report on Survey Findings

May 2008

CONTENTS

- Background & Methodology
- Demographics & Trip Characteristics
- Marketing Impact
- Visitor Experience
- Gophila.com Hotel Offers
- Key Insights

BACKGROUND

- The winter 2007-08 hotel survey report covers the period from November 15, 2007 to March 30, 2008, which is referred to as the winter 2007-08 hotel season. During that time, 2,760 hotel reservations made on gophila.com were consumed, totaling 4,438 room nights and \$721,148 in revenue, for an ADR of \$162.49
 - ADR for Center City hotels, which comprise 95% of gophila.com reservations, was \$159 during this time period

- The following hotel offers were available during this time:
 - Individual room nights
 - Philly Overnight Package
 - Holidays Hotel promotion (available Nov 21-Jan 9)
 - Frida Kahlo Hotel Package (*dates MS*)
 - Renoir Hotel Package (*dates MS*)
 - Philly Like a Local Hotel Package
 - Philadelphia Freedom Hotel Package

- 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

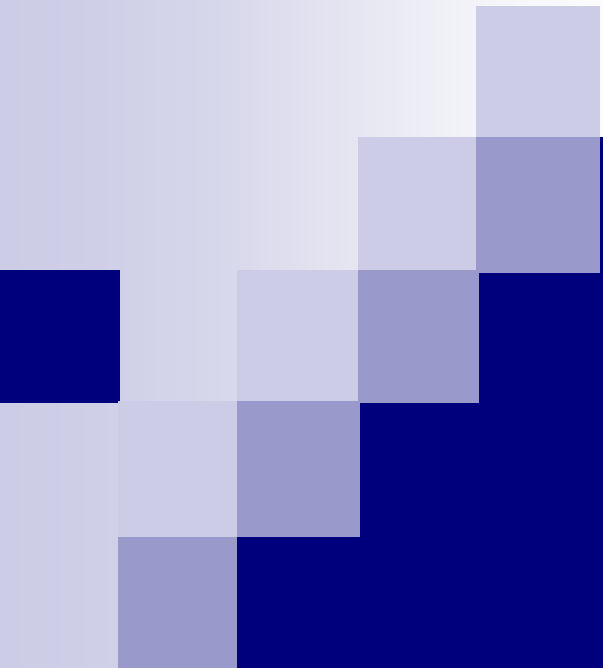
- GPTMC mailed a survey invitation to all winter hotel visitors who booked their stay through gophila.com.
- A total of 2,668 invitations were sent out, with 622 completed surveys for a response rate of 23.3%.
- As an incentive, respondents were offered the chance to win a \$300 American Express Gift Cheque.
- The error rate for survey findings is +/- 3.9% at 95% confidence.
- Percentages appearing on bars are rounded, which may lead to bars of different length with the same label and graphs in which labels do not total 100%.
- Questions as they appeared in the survey are listed below each graph.
- This is the 8th 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 and winter 06-07 unless otherwise labeled.



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Demographics and Trip Characteristics

HOTEL VISITOR DEMOGRAPHICS

- Visitors to Greater Philadelphia in winter 2007-08 were slightly younger than in winter 2006-07, while maintaining an average annual household income of over \$110,000.

		Winter 2007-08	Winter 2006-07
Average Age		43.3 years	45.7 years
Average Household Income		\$110,798	\$110,495
Gender		60% female	56% female
Race			
	Caucasian	88%	87%
	African-American	6%	6%
	Asian-American	3%	3%
	Hispanic/Latino	2%	1%
	Other	1%	3%

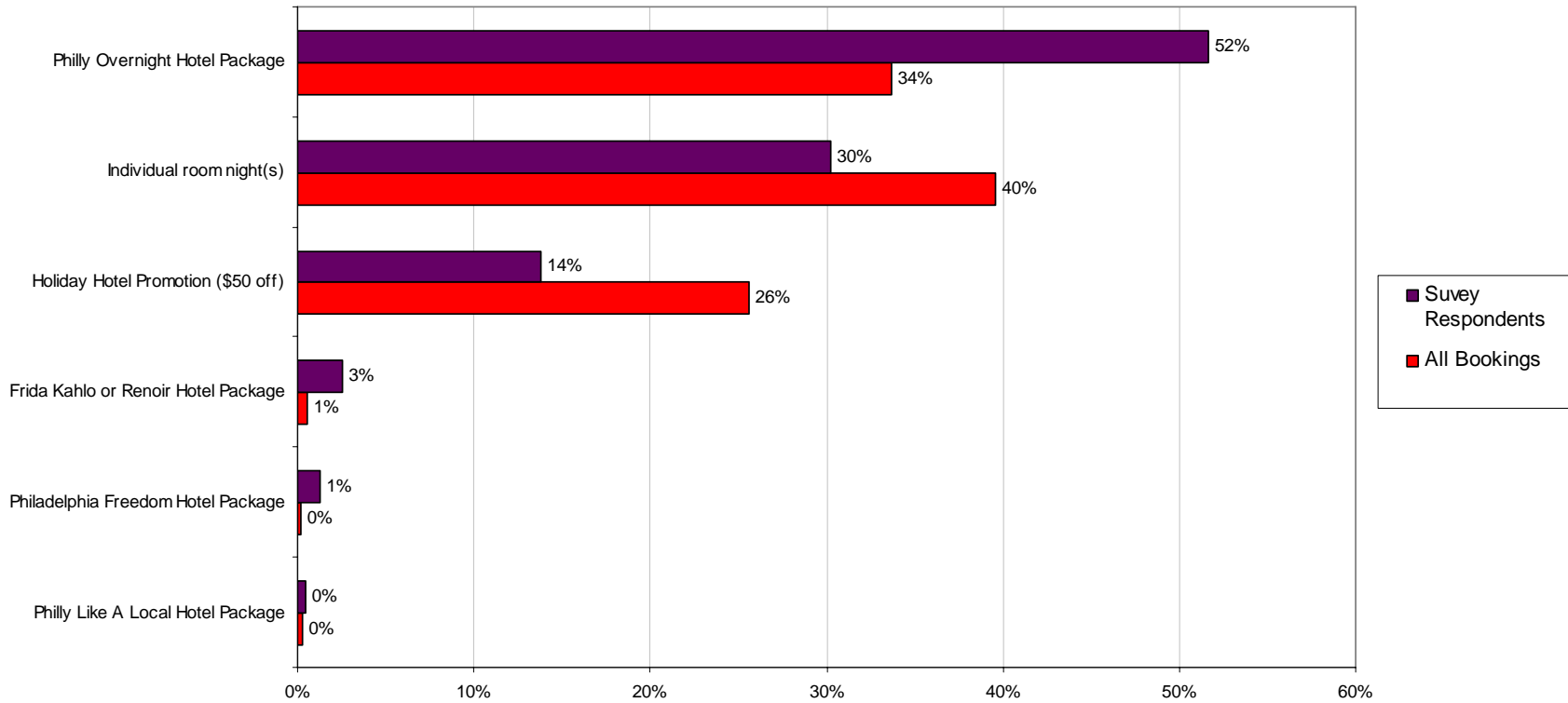
TRIP CHARACTERISTICS

- Party size increased in winter 07-08 from the previous winter, while length of stay decline slightly. 61% of winter 2007-08 visitors reported having previously visited Greater Philadelphia for an overnight stay in the past three years.

		Winter 2007-08	Winter 2006-07
Party Size		2.57 people	2.35 people
Length of Stay		1.72 nights	1.87 nights
Repeat Visitors (past 3 years)		61%	n/a
Location of Hotel Stay		95% downtown	96% downtown
Mode of Arrival			
	Car	87%	90%
	Train	5%	6%
	Plane	5%	3%
	Other	3%	1%

HOTEL STAY

- Just over half of survey (52%) of survey respondents booked the Philly Overnight Package, while individual room nights were actually the most popular offer booked on gophila.com during the winter 2007-08 season.



DEMOGRAPHICS BY BOOKING TYPE

- Visitor demographics varied significantly by package booked. For example, the holidays promotional offer on average drew younger visitors with a high intent to return for shorter trips.

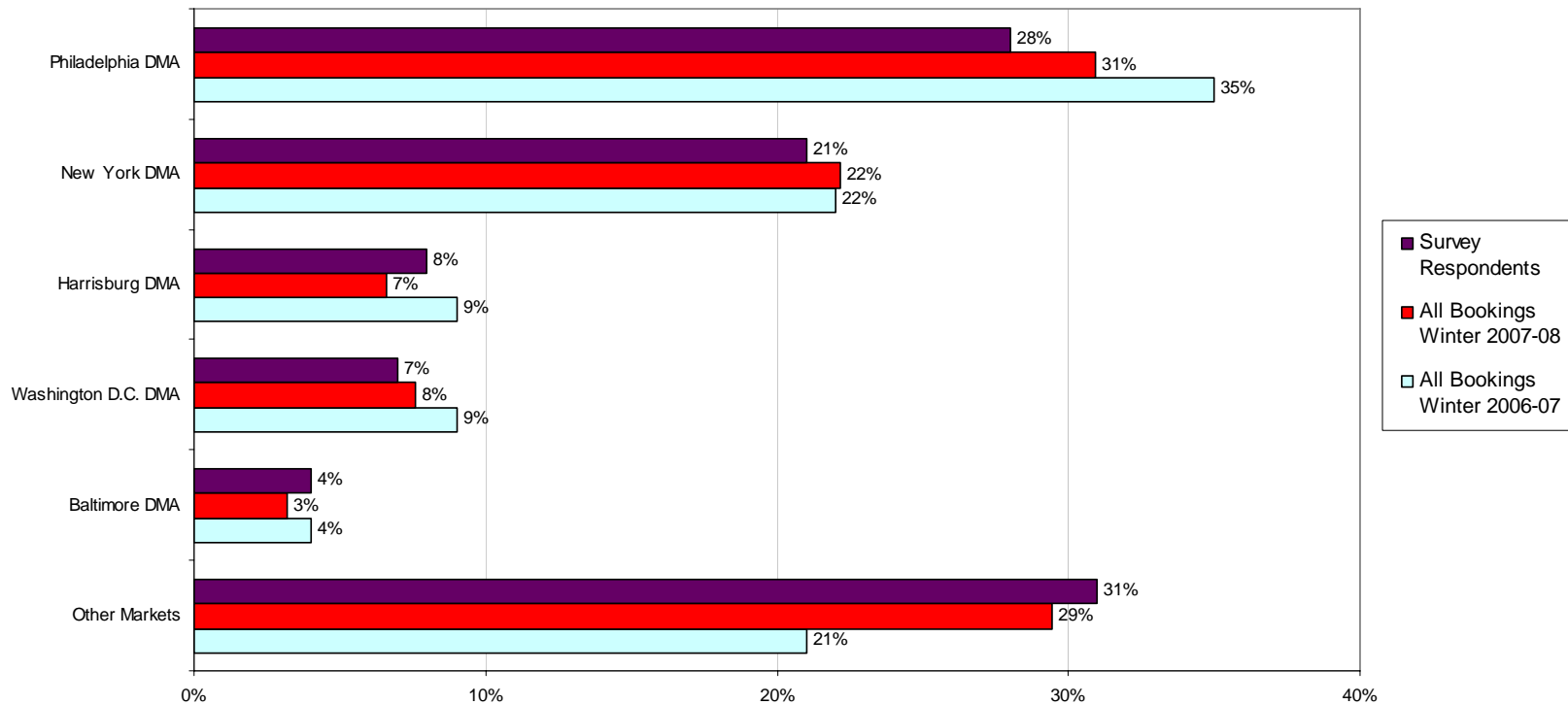
Visitor Demographics by Gophila.com Hotel Offer

Demographic	Philly Overnight Package	Holidays Promotion	Individual Room Nights	
Sample	321	86	188	
Age	44.3 years	38.5 years	43.1 years	
Annual Household Income	\$114,215	\$105,357	\$105,767	
Repeat Visitors (past 3 years)	65%	64%	55%	
Intent to Return (next year)	75%	87%	74%	
Length of Stay	1.9 nights	1.5 nights	1.6 nights	
Party Size	2.5 people	2.2 people	2.5 people	
Total Trip Spending	\$869	\$788	\$788	
Hotel Spend (per night)	\$190	\$226*	\$205	
DMA				
	Philadelphia	28%	33%	29%
	New York	22%	20%	20%
	Washington	6%	8%	8%
	Harrisburg	9%	5%	9%
	Baltimore	6%	0%	3%
	Other	29%	34%	31%

* \$50 promotion cost was added on to spending to estimate the rate the hotel received

GEOGRAPHY

- Visitors from “other markets” outside of GPTMC’s traditional targets comprised nearly 30% off all bookings in winter 07-08, up from just 21% in winter 06-07. Survey respondents matched very closely geographically with all bookers on gophila.com during the winter season.





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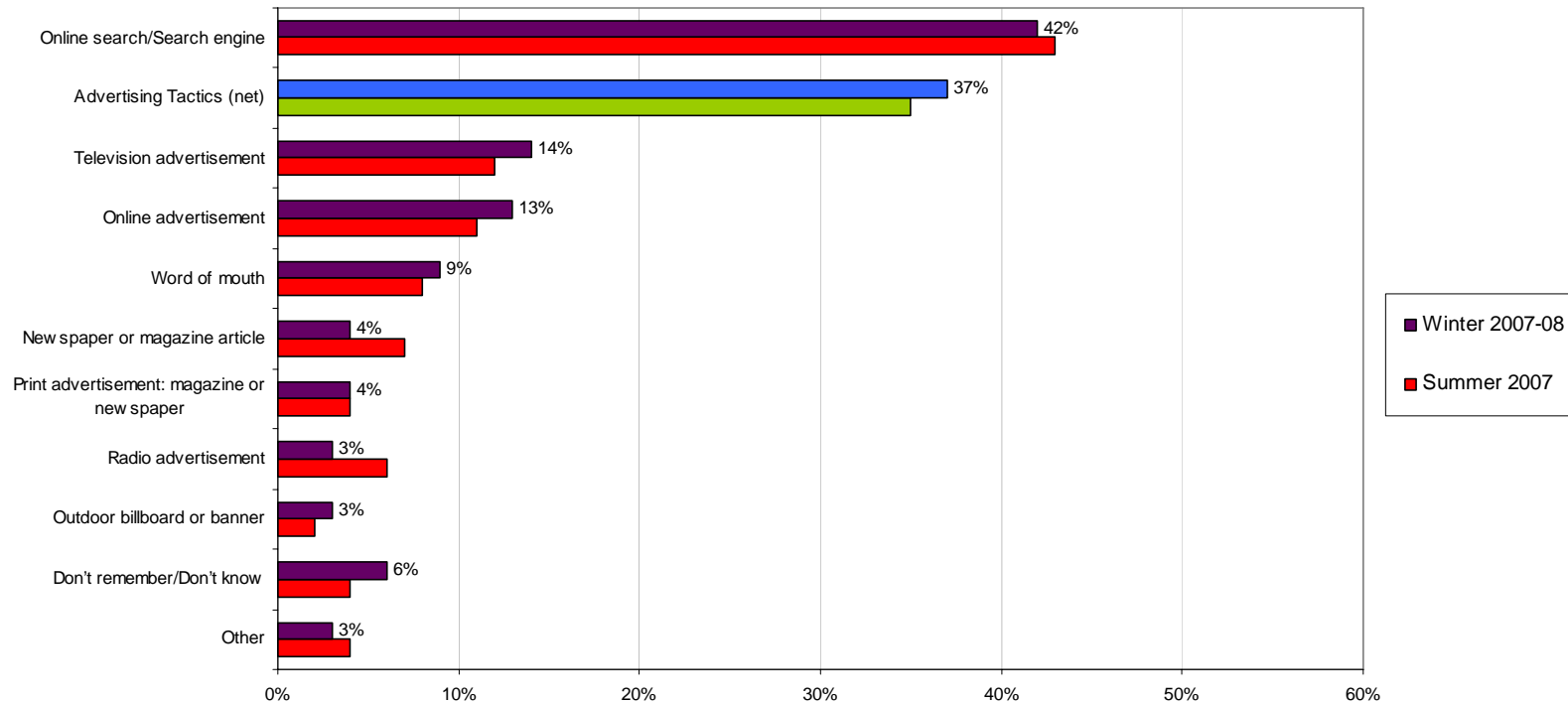
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Marketing Impact

LEARNING ABOUT GOPHILA.COM

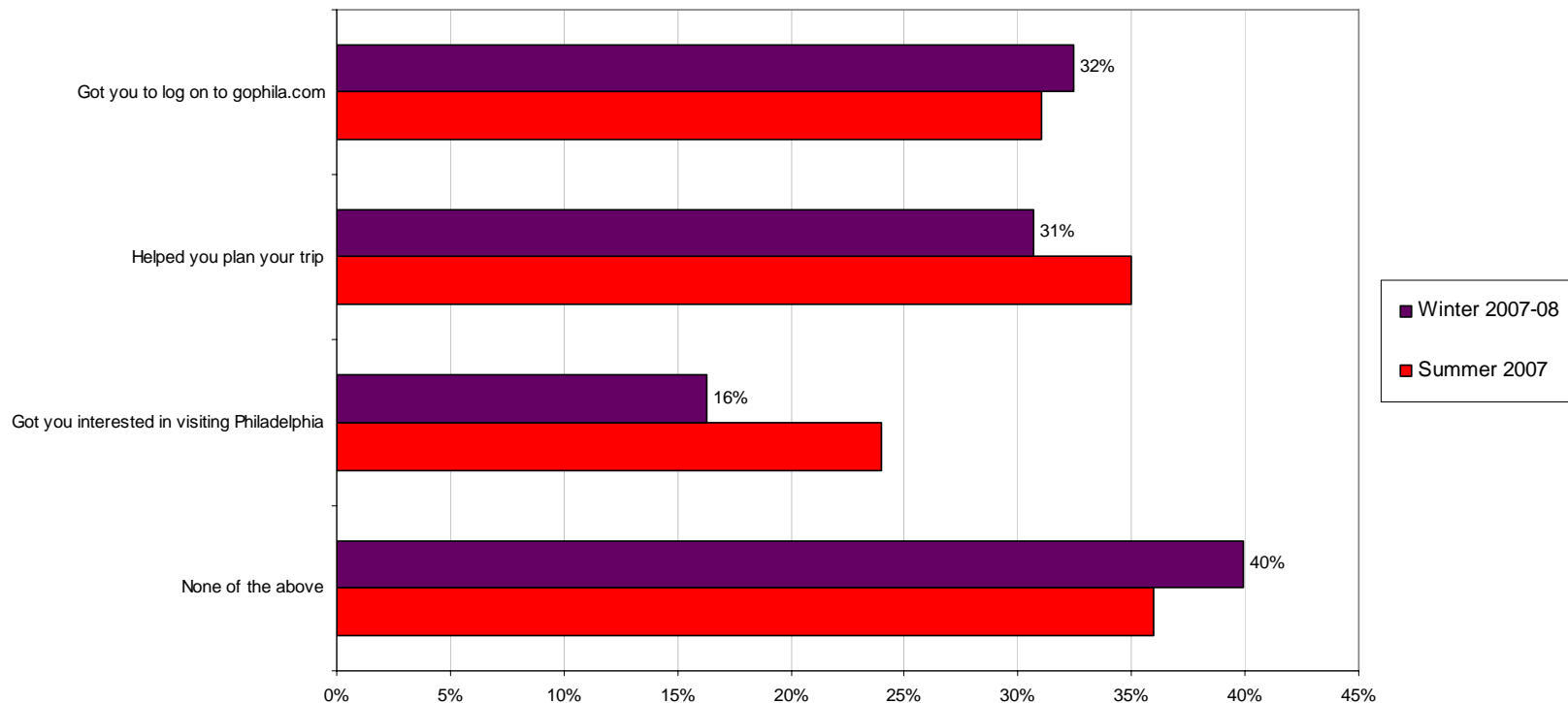
- When visitors were asked how they first learned about gophila.com, search engines were once again the top source (42%). Many visitors (37%) also learned through a variety of advertising tactics (TV, Online, Print, Radio and Outdoor billboards/banners).



Q: How did you learn first learn about gophila.com?

PUBLIC RELATIONS IMPACT

- 60% of visitors said that reading an article about Philadelphia caused them to seek more information about visiting. Articles were slightly less effective in creating interest in visiting than they had been in the summer.



Q: Reading a magazine, newspaper or internet article about Philadelphia...



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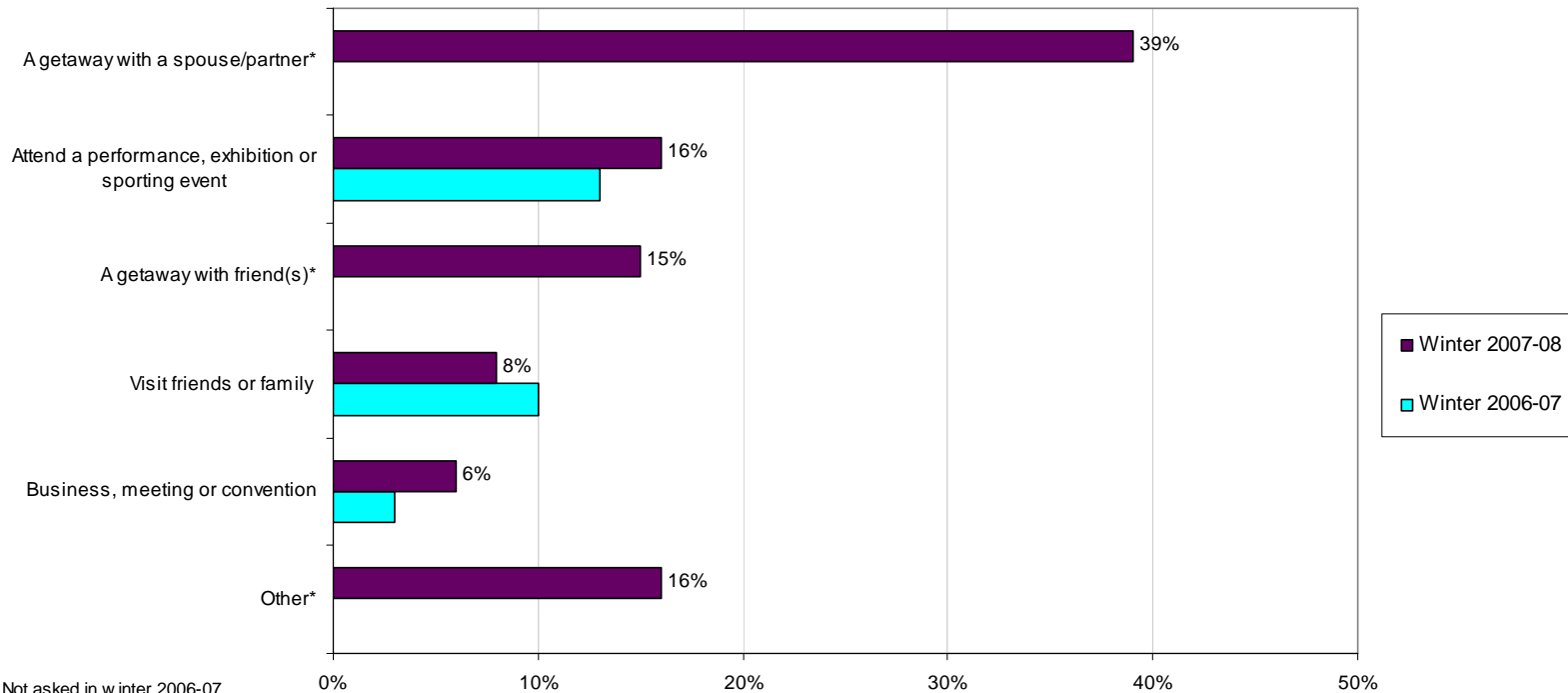
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Visitor Experience

PURPOSE OF VISIT

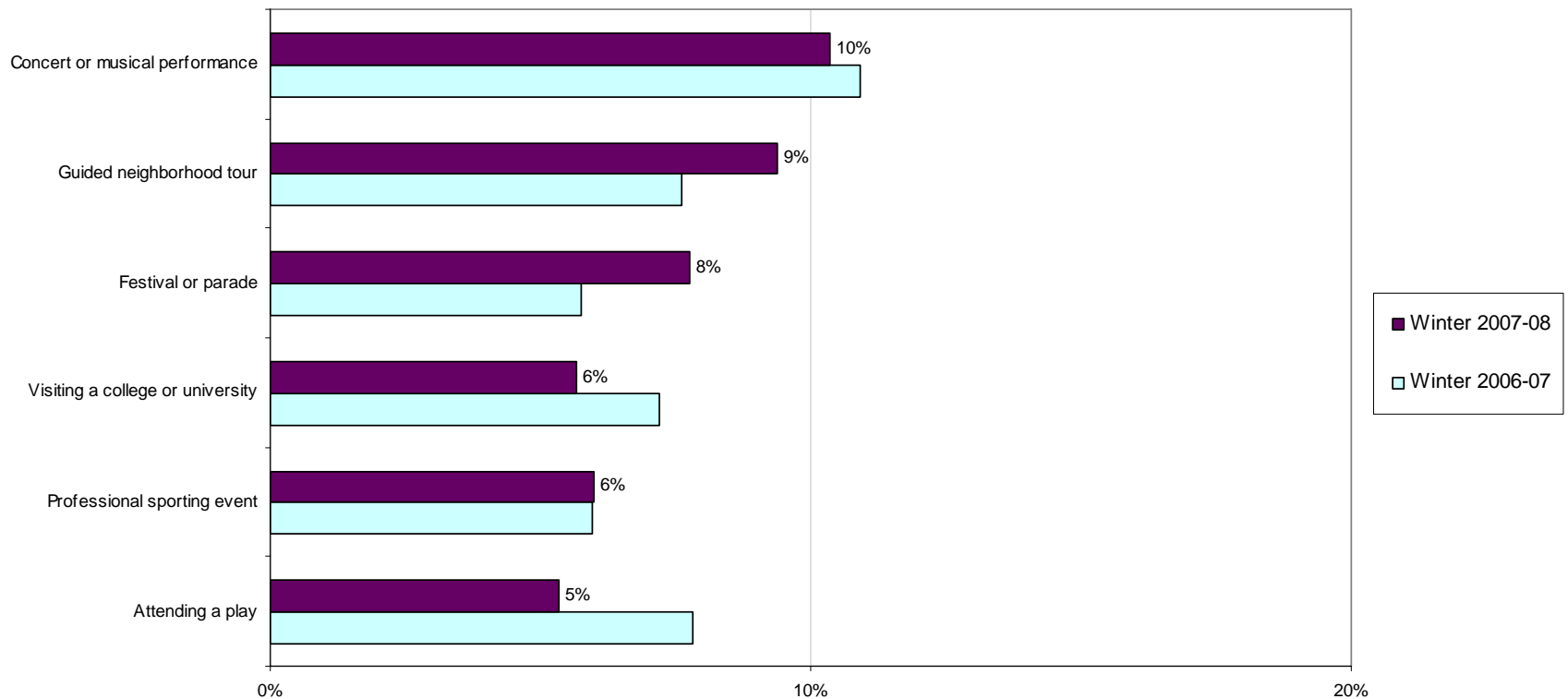
- A getaway with a spouse/partner was the top purpose of stay for visitors (39%), ahead of attending an event and a getaway with friends. Purpose of visit was asked slightly differently in previous years, with “general getaway” as the overwhelming top response.



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

ACTIVITY PARTICIPATION

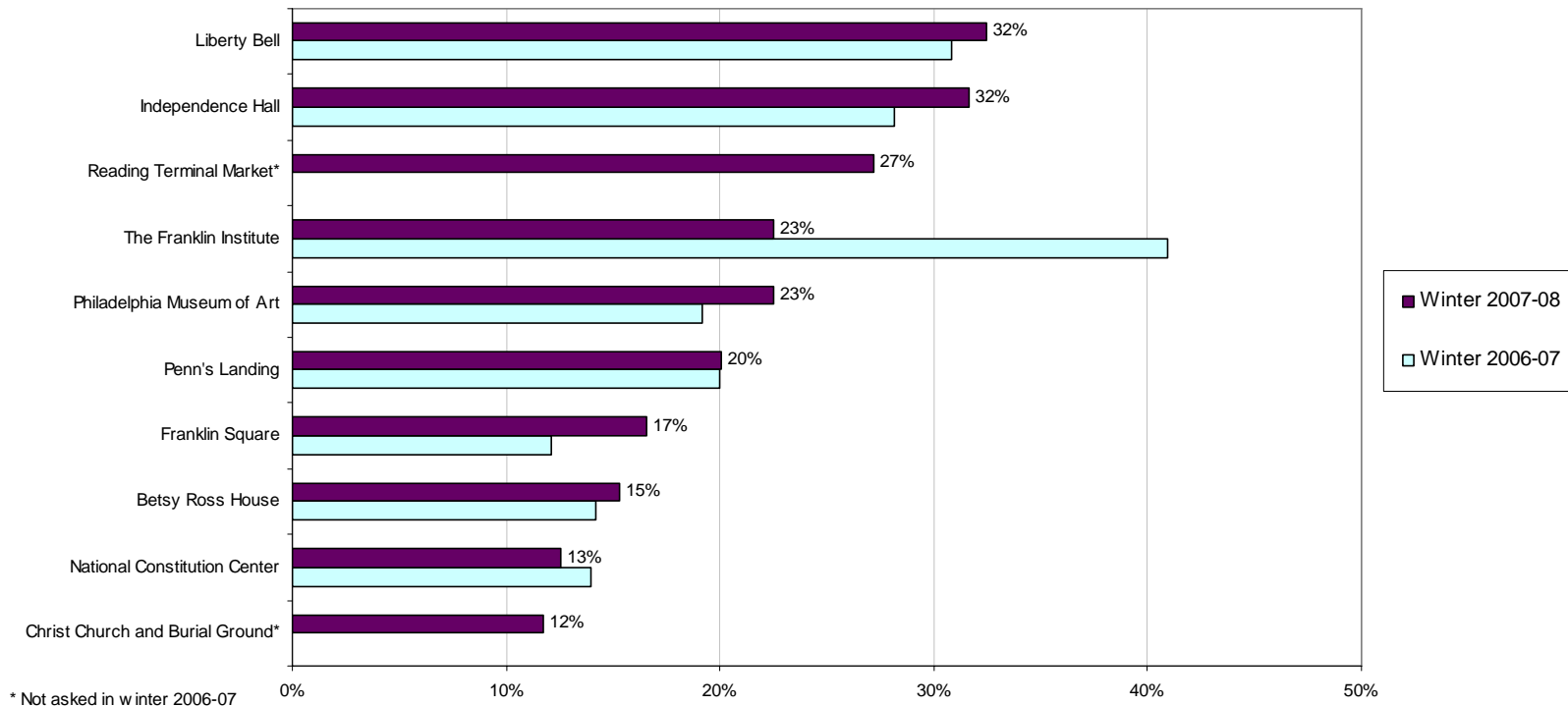
- Visitors were split relatively evenly between the most popular activities, such as concerts, guided neighborhood tours, and festivals/parades.



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

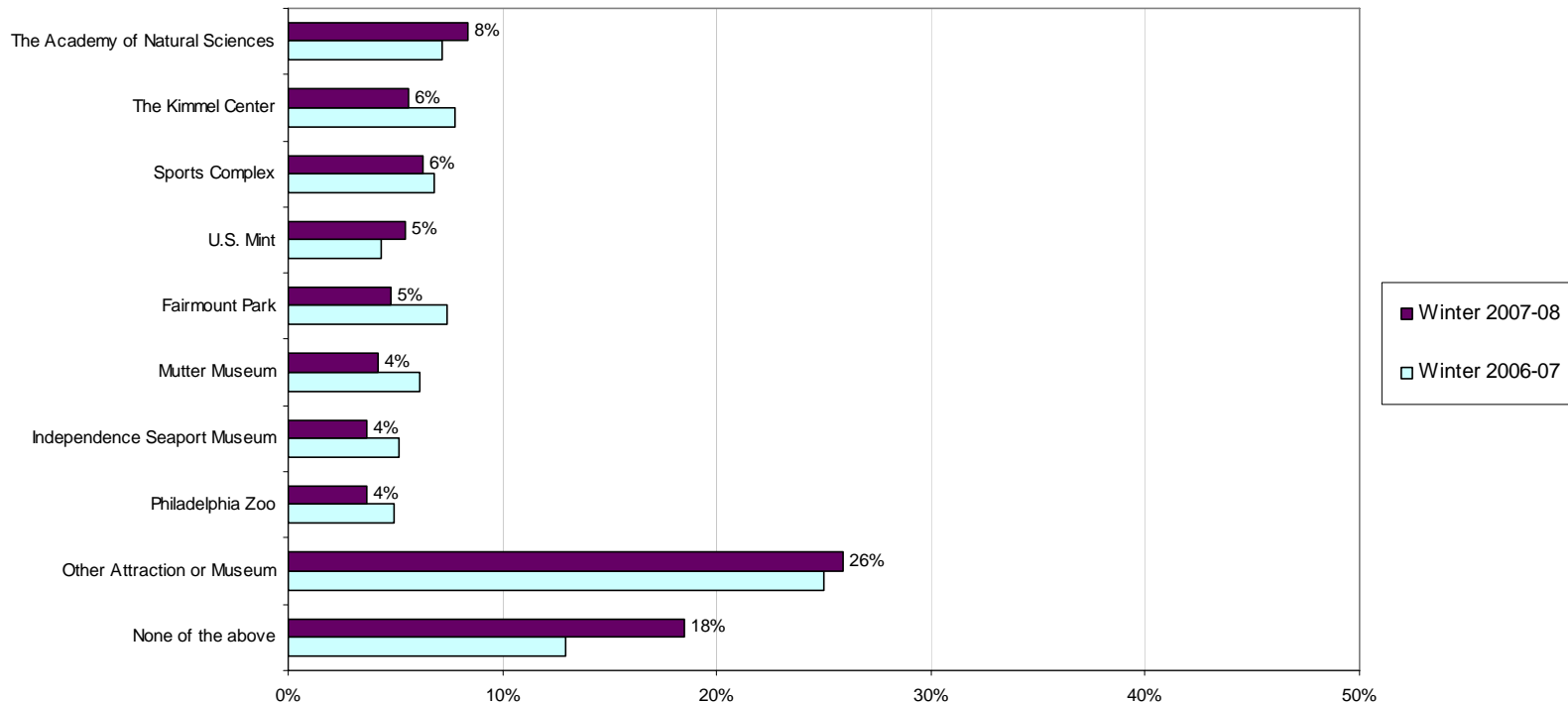
ATTRACTIONS VISITED

- The Liberty Bell and Independence Hall resumed their traditional place as the most popular attractions among hotel visitors. The Franklin Institute was most popular in winter 06-07 due to the blockbuster *King Tut* exhibition.



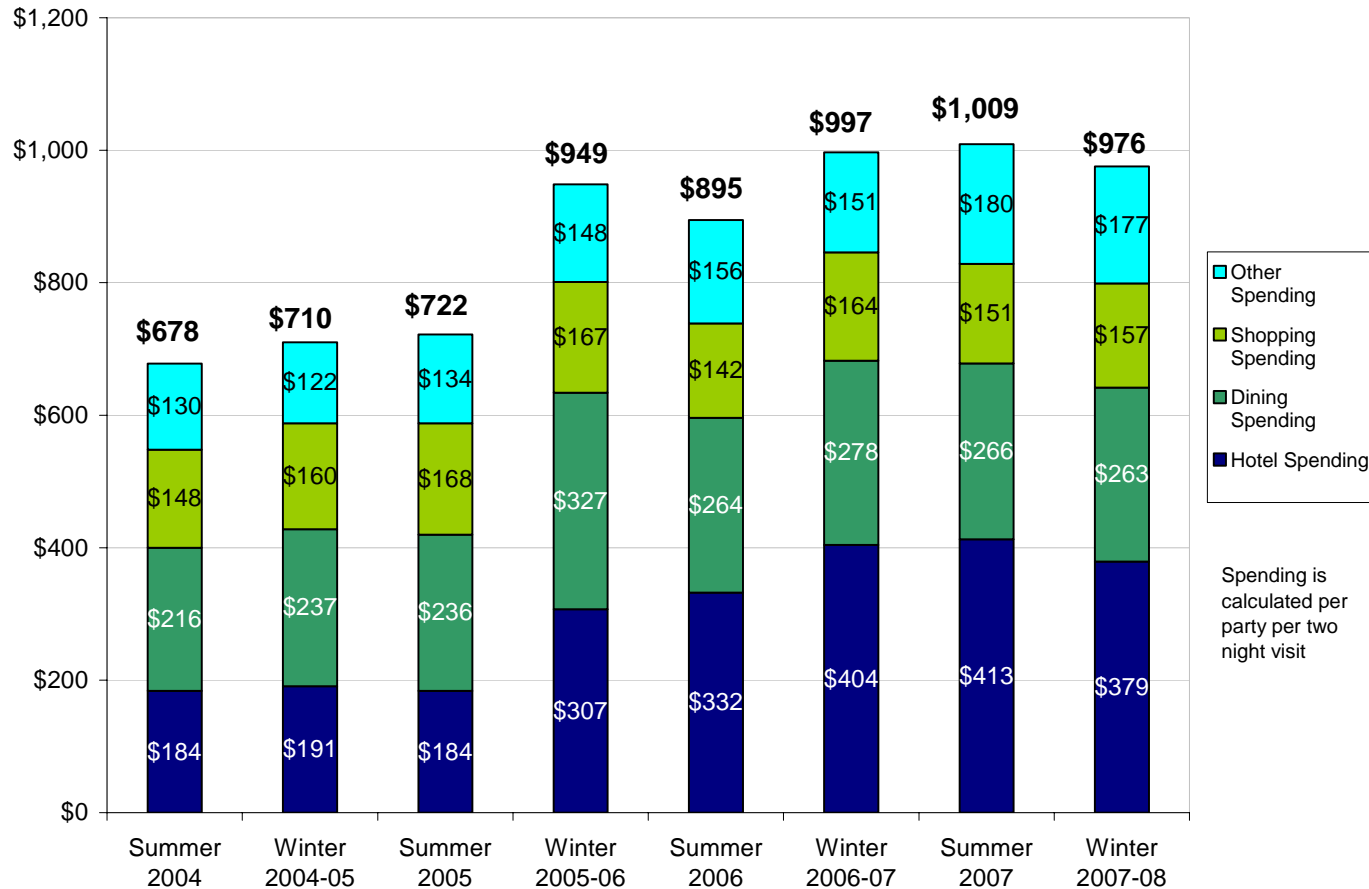
ATTRACTIONS VISITED (Con't)

- Over one quarter (26%) of respondents visited an attraction or museum not listed, while 18% reported visiting no attraction at all, up slightly from winter 06-07.



VISITOR SPENDING

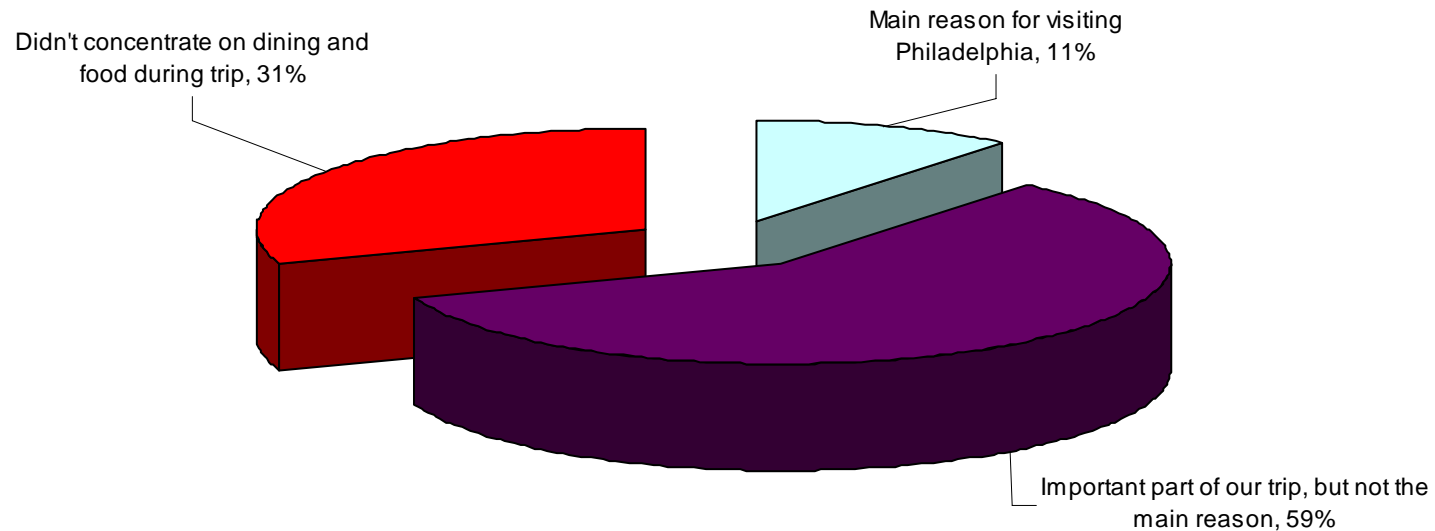
- Visitor spending declined slightly in Winter 2007-08 to \$976 per party travel per 2 nights. This decline was due primarily to a decrease in hotel rate since the past two surveys, which included many bookers of the more expensive King Tut VIP package.



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

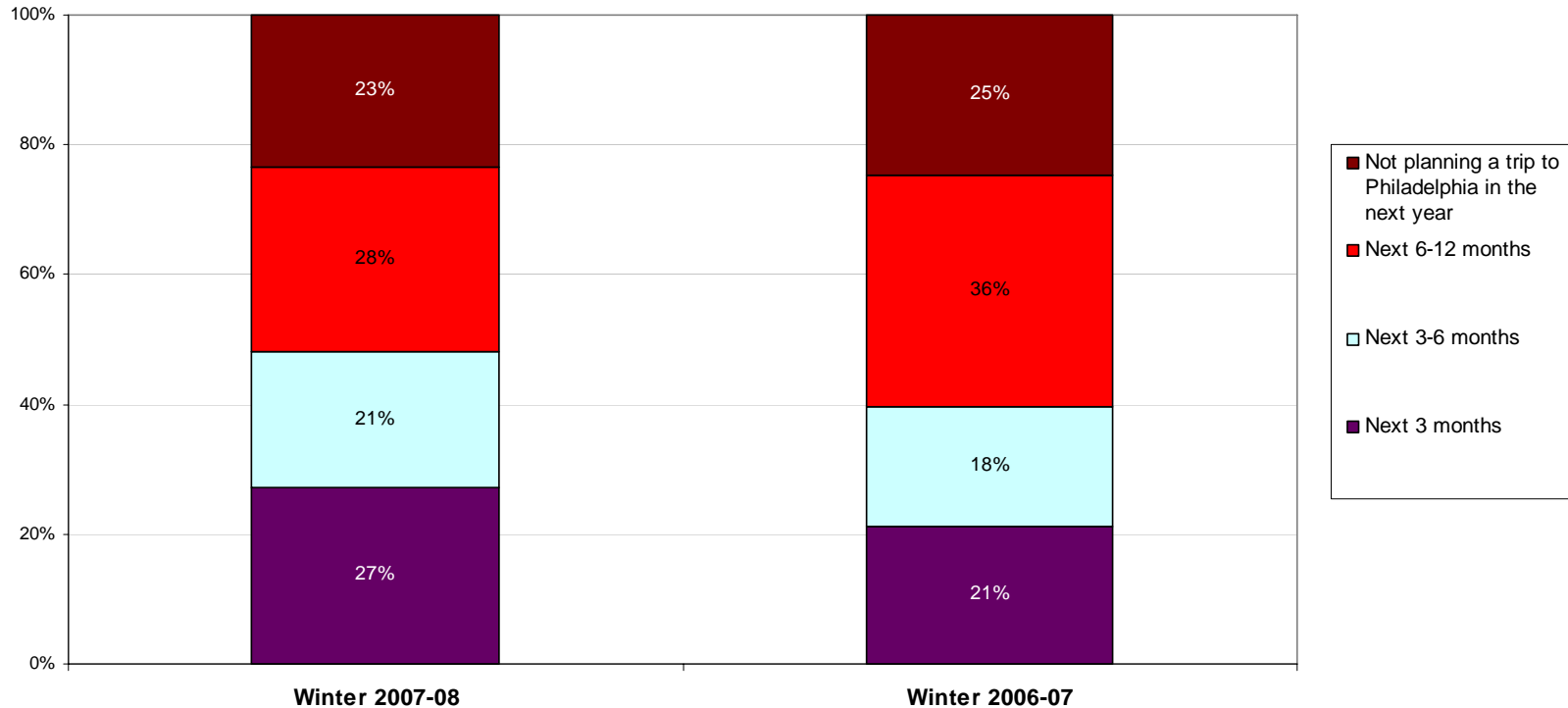
DINING EXPERIENCE

- The majority of visitors (59%) reported that dining experiences were an important part of their trip, but just 11% cited them as their main reason for visiting Philadelphia.



INTENT TO RETURN

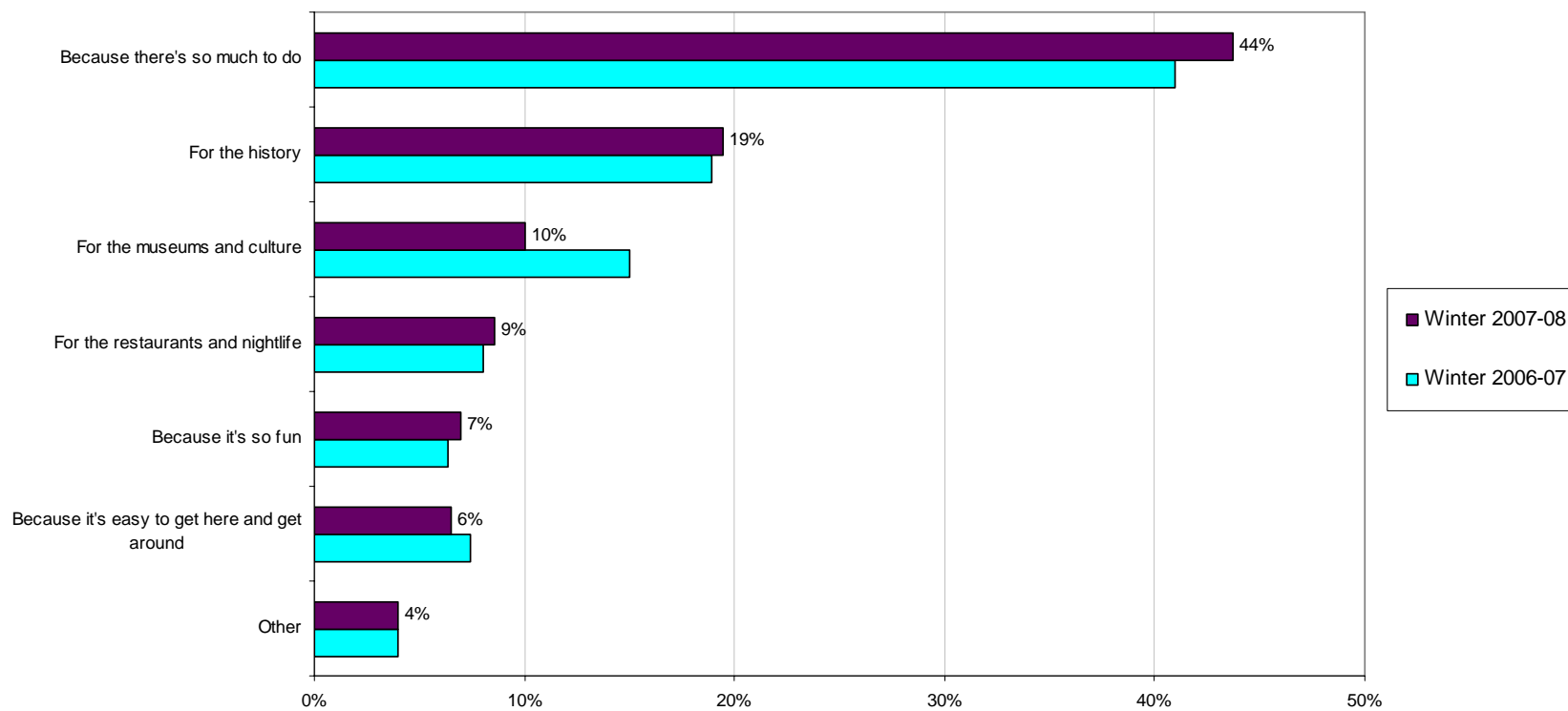
- Intent to return to Philadelphia within the next year is up slightly from winter 06-07, with 77% of visitors planning another trip within the next year, and 27% within the next three months.



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

REASON TO VISIT

- When asked what reason they would give others to visit Greater Philadelphia, visitors continue to overwhelmingly choose “so much to do” (44%) over specific attributes like history, museums or restaurants.



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



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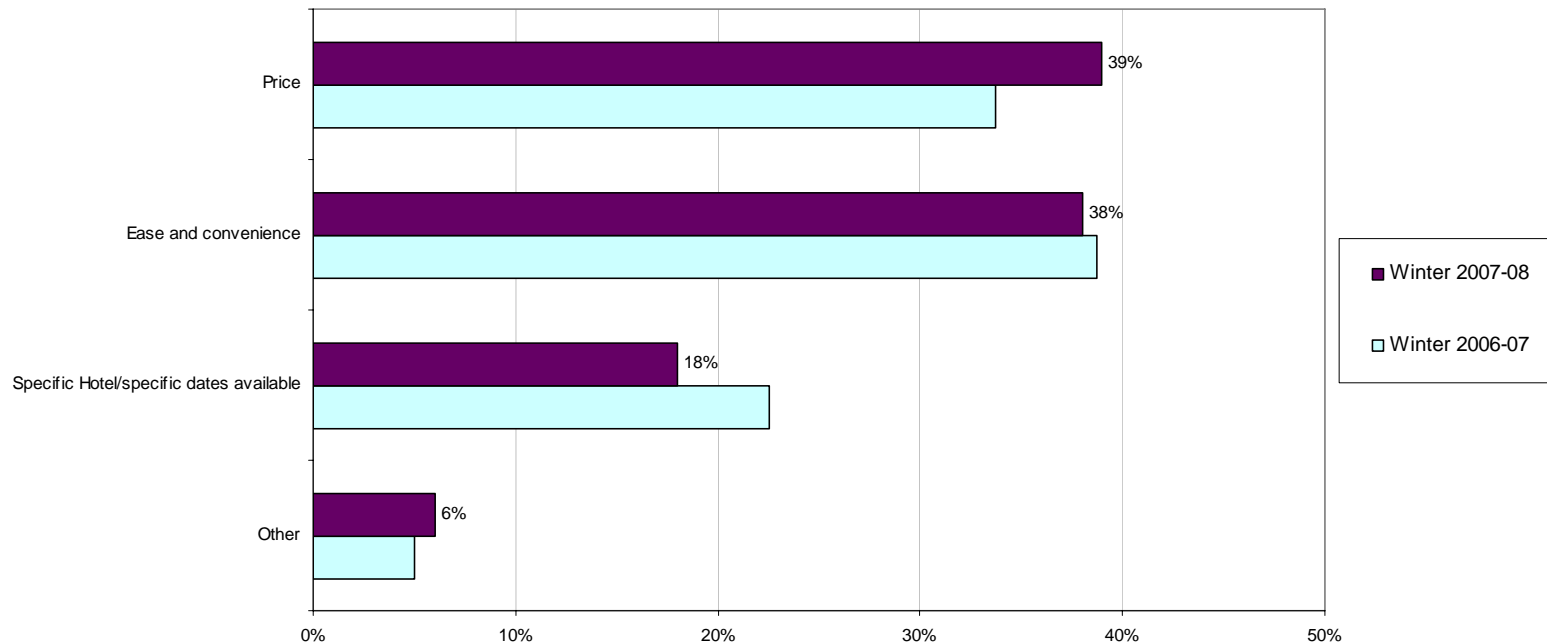
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BOOKING ROOMS ON GOPHILA.COM

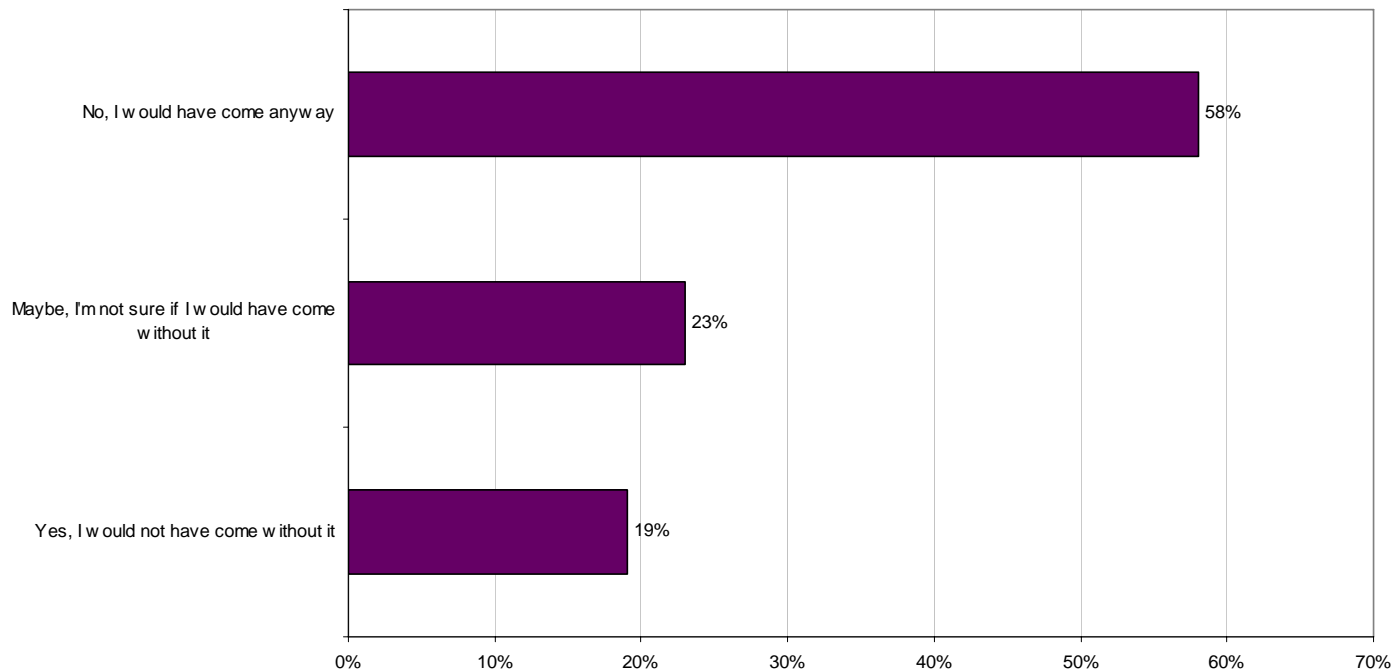
- Among visitors booking individual room nights on gophila.com, price was the reason most frequently cited (39%), just ahead of ease and convenience (38%), which was the top choice in winter 06-07.



Q: Why did you choose to book on gophila.com?

HOLIDAYS HOTEL PROMOTION

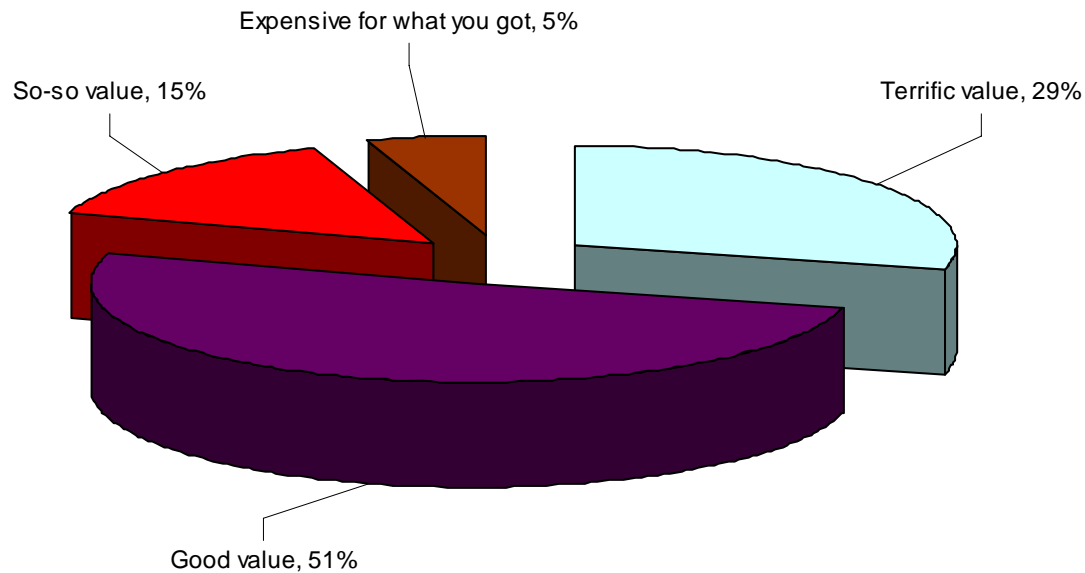
- The majority (58%) of visitors who booked the Holidays promotional offer said they would have come to Philadelphia even without the discount- just 19% said they definitely would not have come without it.



Q: Was the Holiday Promotion with the \$50 gift your main reason for coming to Philadelphia?

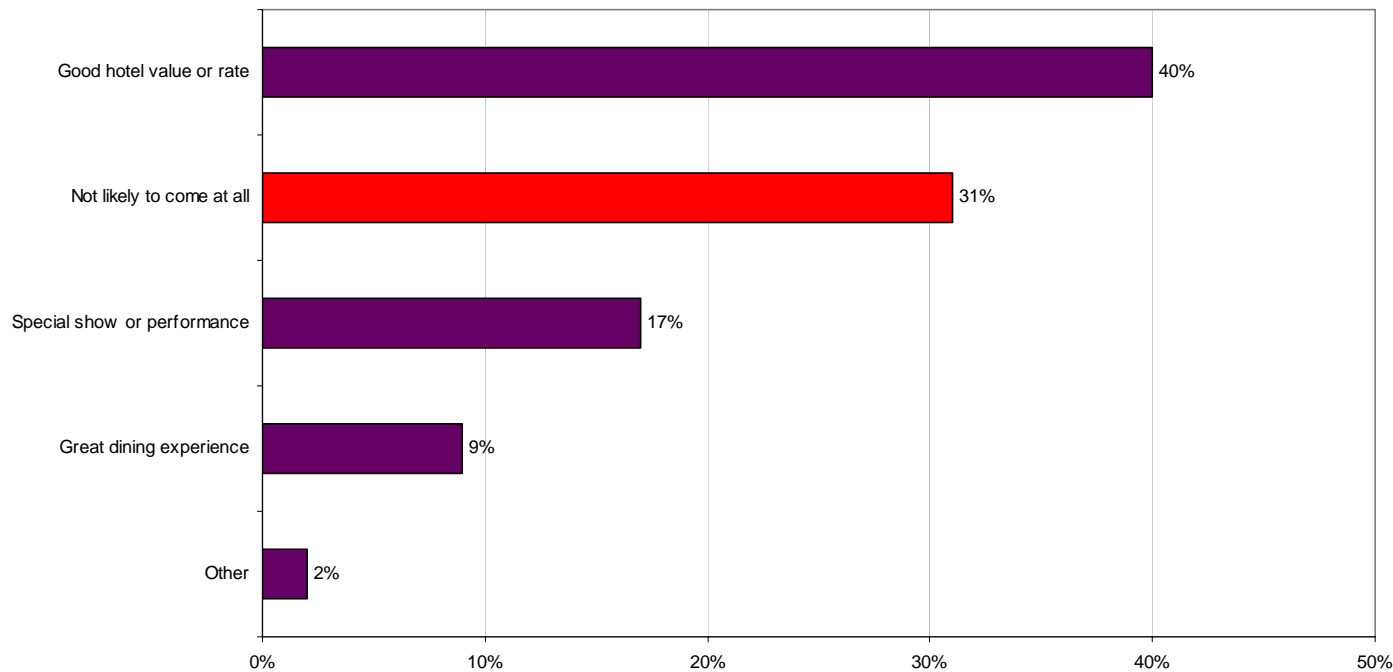
PHILLY OVERNIGHT PACKAGE VALUE

- The Philly Overnight package was rated as a “terrific” or “good” value by 80% of visitors who booked it, with just 5% calling it “expensive.”



MID WEEK STAY

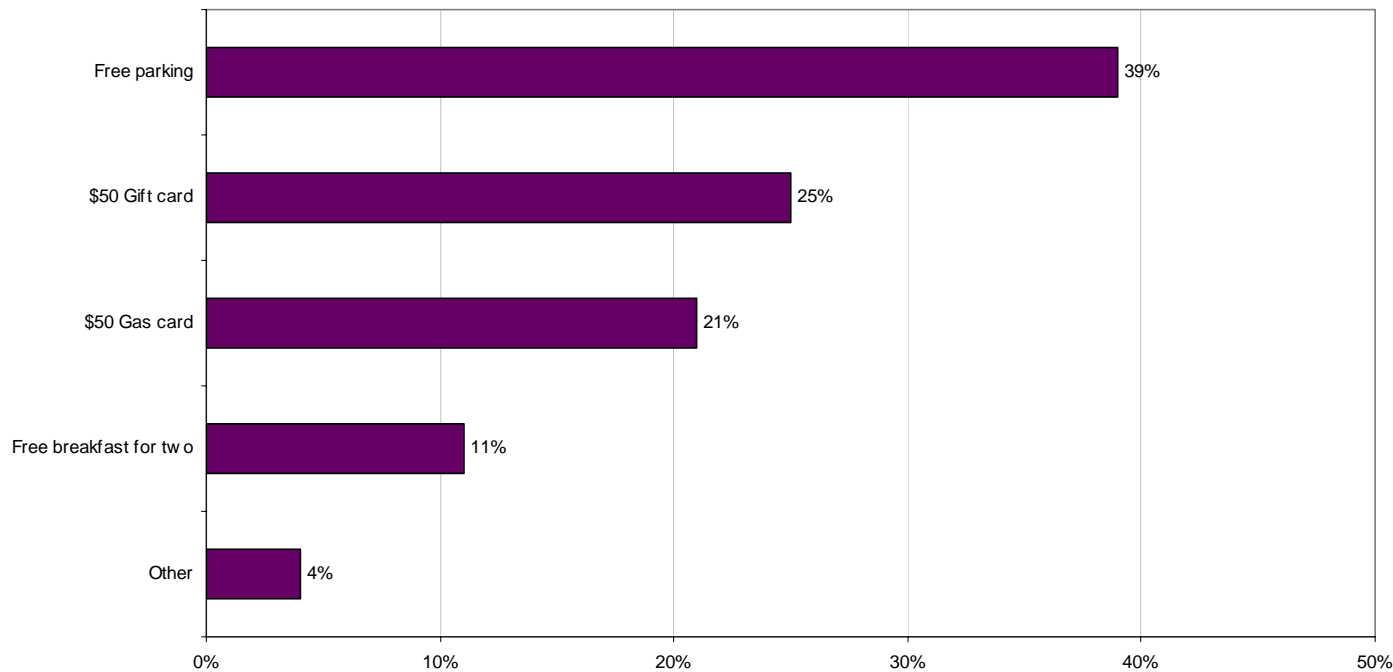
- When asked what kind of offer would inspire a mid-week hotel visit, respondents most frequently chose a good value or rate (40%). 31% of respondents said they were not likely to come mid-week at all.



Q: Which of the following offers would lead you to book a mid-week hotel stay?

HOTEL PACKAGE AMENITIES

- When asked about potential hotel package offers, respondents chose free parking as the top added value item (39%), ahead of a gift card and a gas card.



Q: Which of the following would you prefer?

KEY INSIGHTS

- More visitors are coming to Philadelphia from outside of our traditional drive markets
 - 29% in Winter 2007-08, 21% in Winter 2006-07
- Hotel visitors came for a general getaway this winter rather than for a specific event
 - 39% for getaway with spouse/partner, 15% for getaway with friends
 - 55% chose “none of the above” for activities
- Value added packaging is important for selling rooms, but the destination is as important as the discount
 - Free parking is preferred over \$50 gift card or gas card
 - 58% of Holidays promotion bookers “would have come anyway” without the discounted offer