



**July 4th Tourism:
Report on the Holiday Weekend**

Results of Intercept Interviews

Final Report

Prepared for Greater Philadelphia Tourism Marketing Corporation

July, 2006



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BACKGROUND

Greater Philadelphia Tourism Marketing Corporation (GPTMC) was interested in getting a “*snapshot*” picture of tourism in Philadelphia over the 2006 July 4th Holiday weekend, which extended from Friday, June 30 to Tuesday, July 4th. The Melior Group was engaged to conduct an intercept survey with visitors to downtown Philadelphia, with questions focusing on the following:

- Profile of visitors: Who was here? Who were they sightseeing/attending events with? Where were they coming from? Did they stay in hotels?
- Reasons for coming to Philadelphia: What were visitors to downtown Philadelphia doing this weekend? Were people here for the special events, to be in the place where the US was born, to visit friends/family, etc? Where else had people considered going for the holiday? What is the single best thing about being in Philadelphia over July 4th?

A total of 1,025 intercept interviews were conducted over the holiday weekend, each lasting approximately 2 minutes. All kinds of adults were approached, regardless of age, race, size of party they were with, etc. Respondents were provided with a small souvenir to thank them for their participation.

Interviews were conducted at the following locations (times of day varied depending on when events were going on):

- Art Museum
- 3rd and Market
- Penn’s Landing
- 6th and Market
- Ben Franklin Parkway
- 12th and Market
- 26th and Parkway

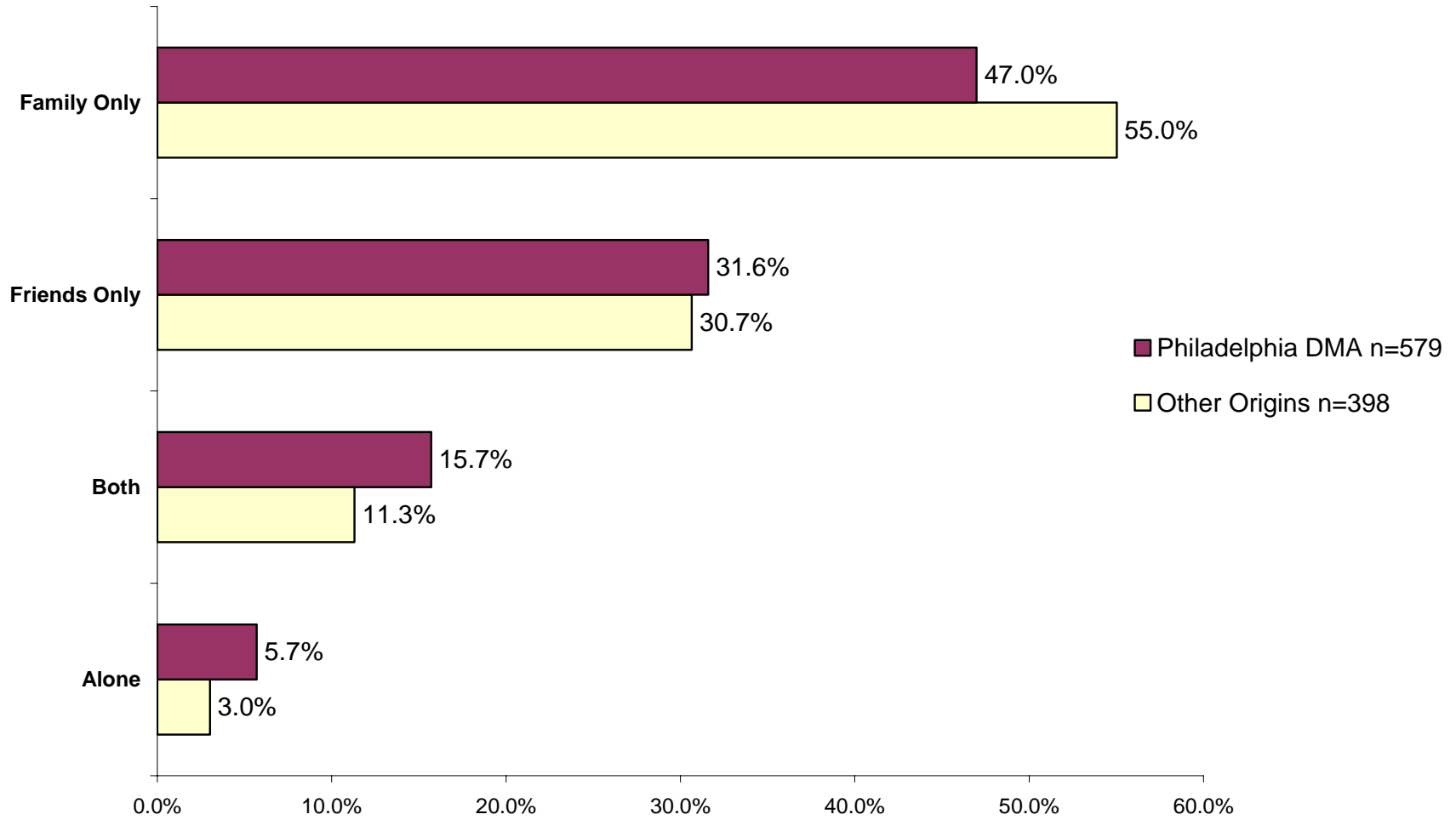
Reported here are the findings from the research, along with implications that can be used in planning future holiday events. Where helpful, results have been segmented by key groups.

Key Findings

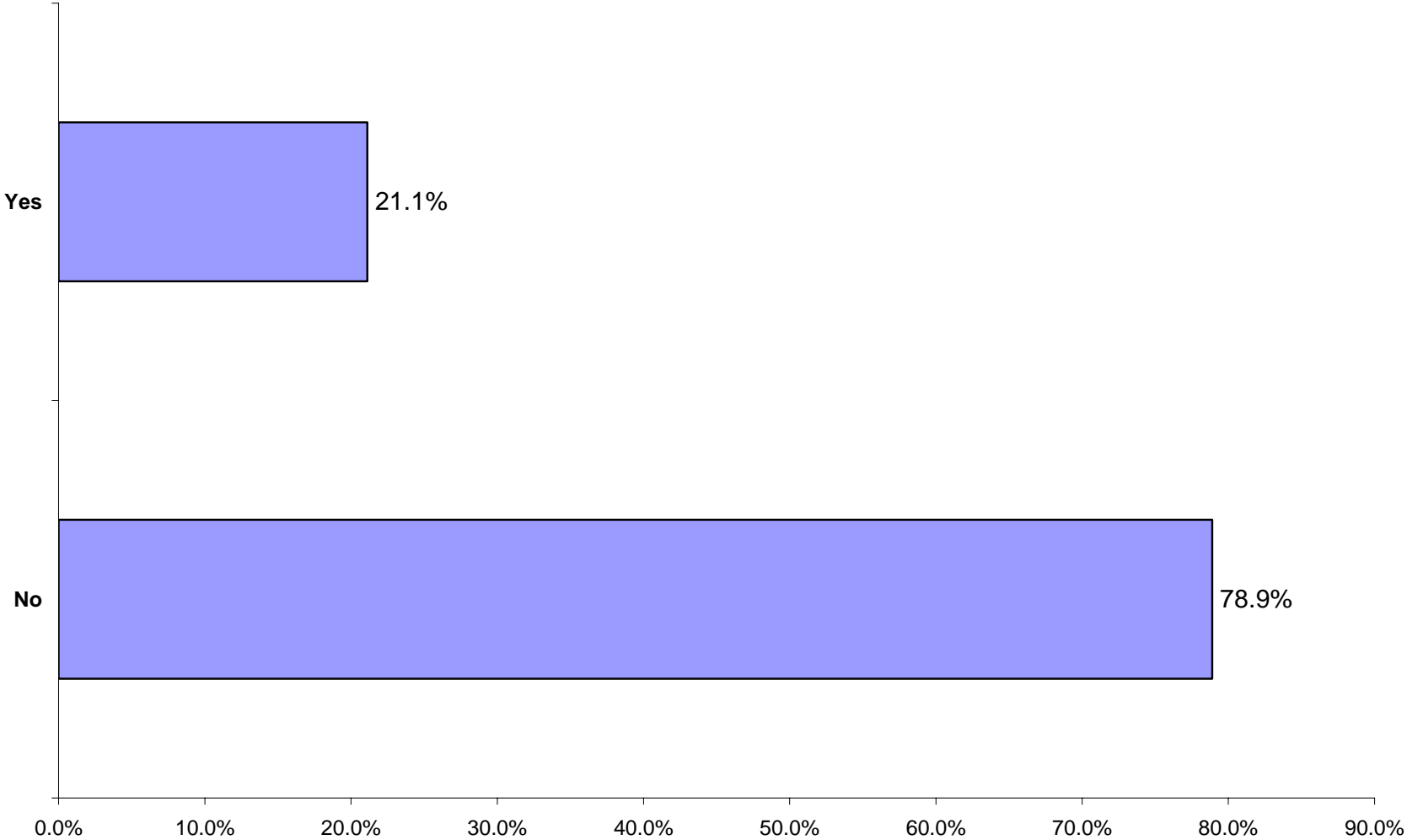
Center City was populated by a mix of locals and out of town visitors on July 4th weekend. Forty percent of visitors surveyed came from outside the Philadelphia DMA, and another 11% were from outside the Five County region, while the remaining 49% were residents of the five counties. While present in nearly equal proportions, locals and out-of-towners experienced the July 4th weekend in markedly different ways.

- When asked what activities they planned to participate in over July 4th weekend, “*Visit the historic district*” was the most frequent answer for out-of-towners at 65.4%, ahead of “*Attend a 4th of July Festivity*” and “*Go to a Museum.*” Locals overwhelmingly planned to attend a July 4th festivity (83.5%), while 36.4% planned to visit the historic district.
- When asked to name the “*Best thing about being in Philadelphia over July 4th weekend,*” out-of-towners overwhelmingly chose “*All the historical attractions and events,*” while locals narrowly preferred “*Fireworks*” with “*Everything is Free*” a close second.
- When asked what other city they considered going to on July 4th weekend, both groups chose New York as the top answer. However, for out-of-towners, Washington D.C. ranked a close second at 24.6%, while locals ranked cities in New Jersey second at a combined 26.5% and showed little interest in traveling to Washington (5.1%).
- Hotel statistics from Smith Travel Research show that hotel occupancy on July 3rd (Monday) and July 4th (Tuesday) were both up relative to 2005 (55% vs. 47.6% on Monday and 51.7% vs. 43.7% on Tuesday). Hotel occupancy on the weekend preceding July 4th was, however, slightly lower in 2006 than in 2005.

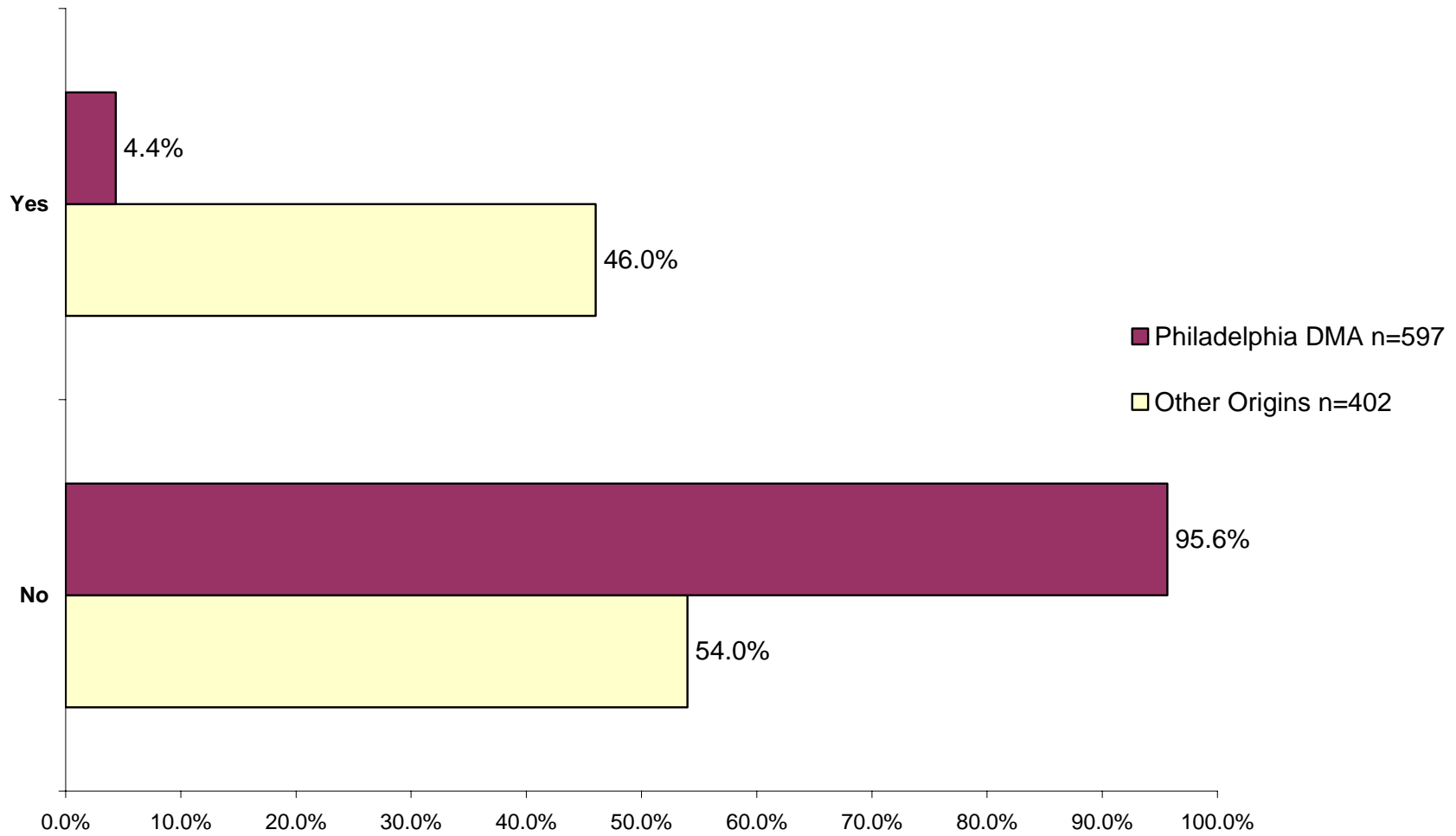
Are you here with...



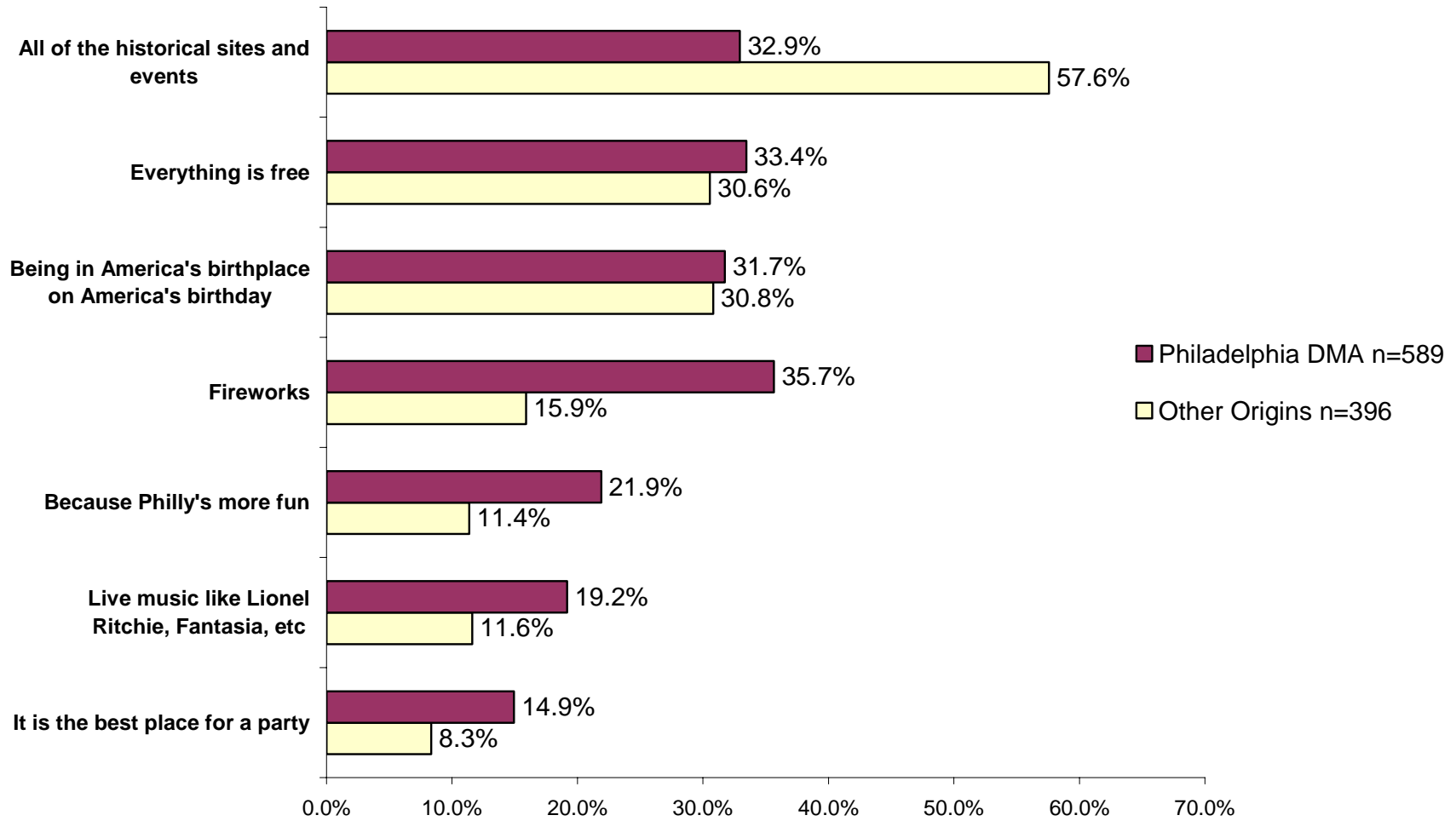
Staying in a hotel?



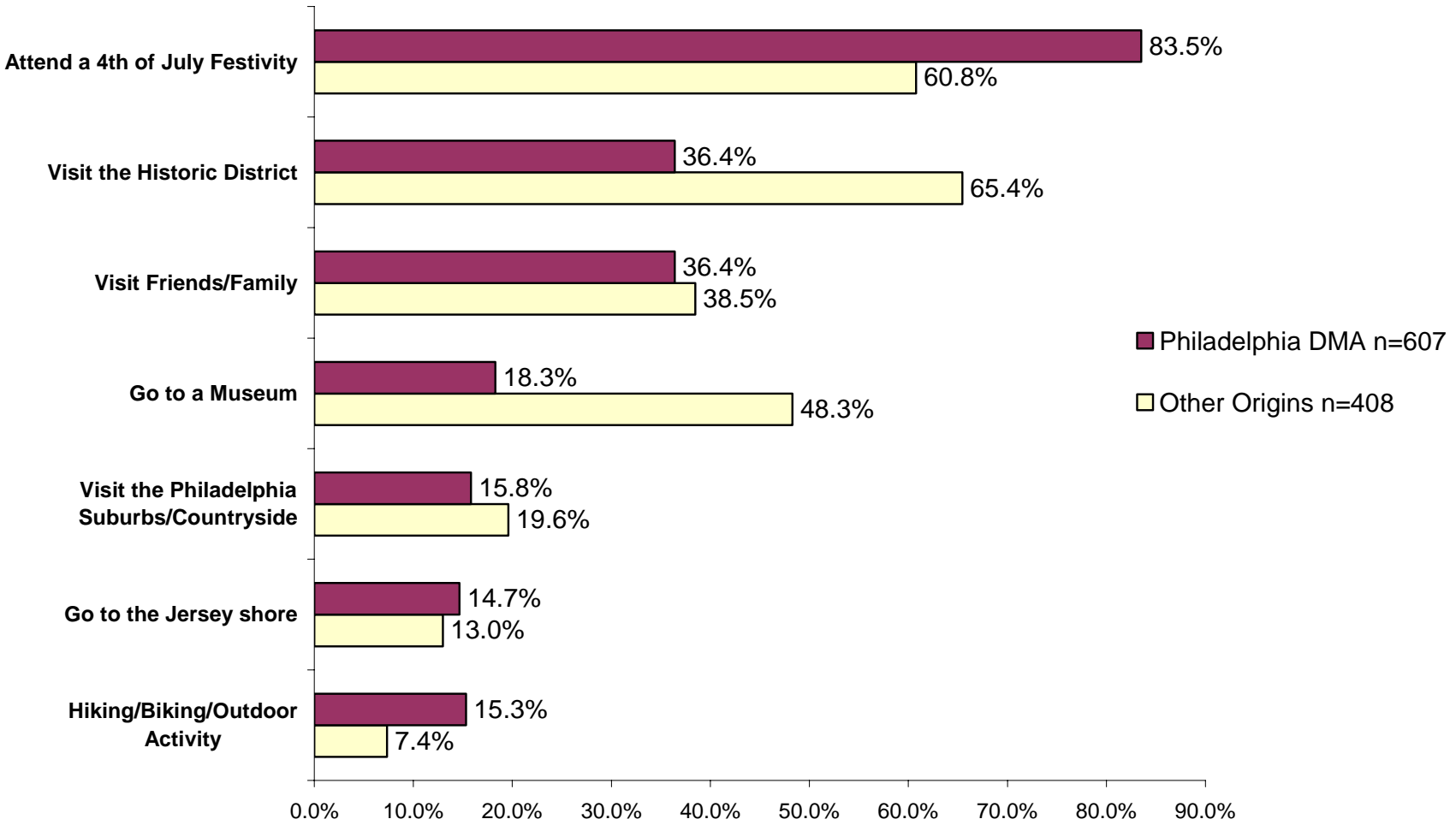
Staying in a hotel?



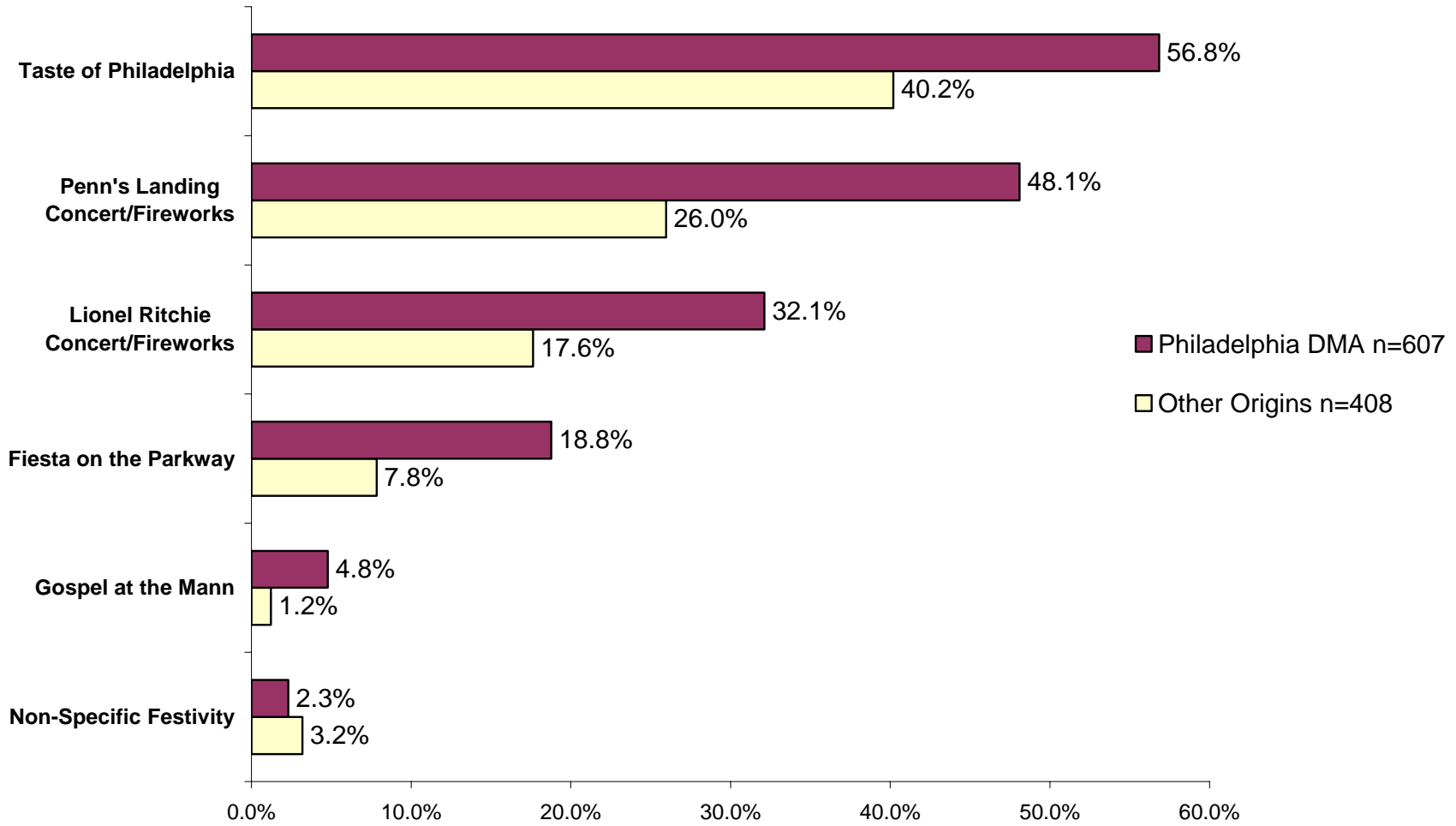
Best Thing about Being in Philadelphia on July 4th



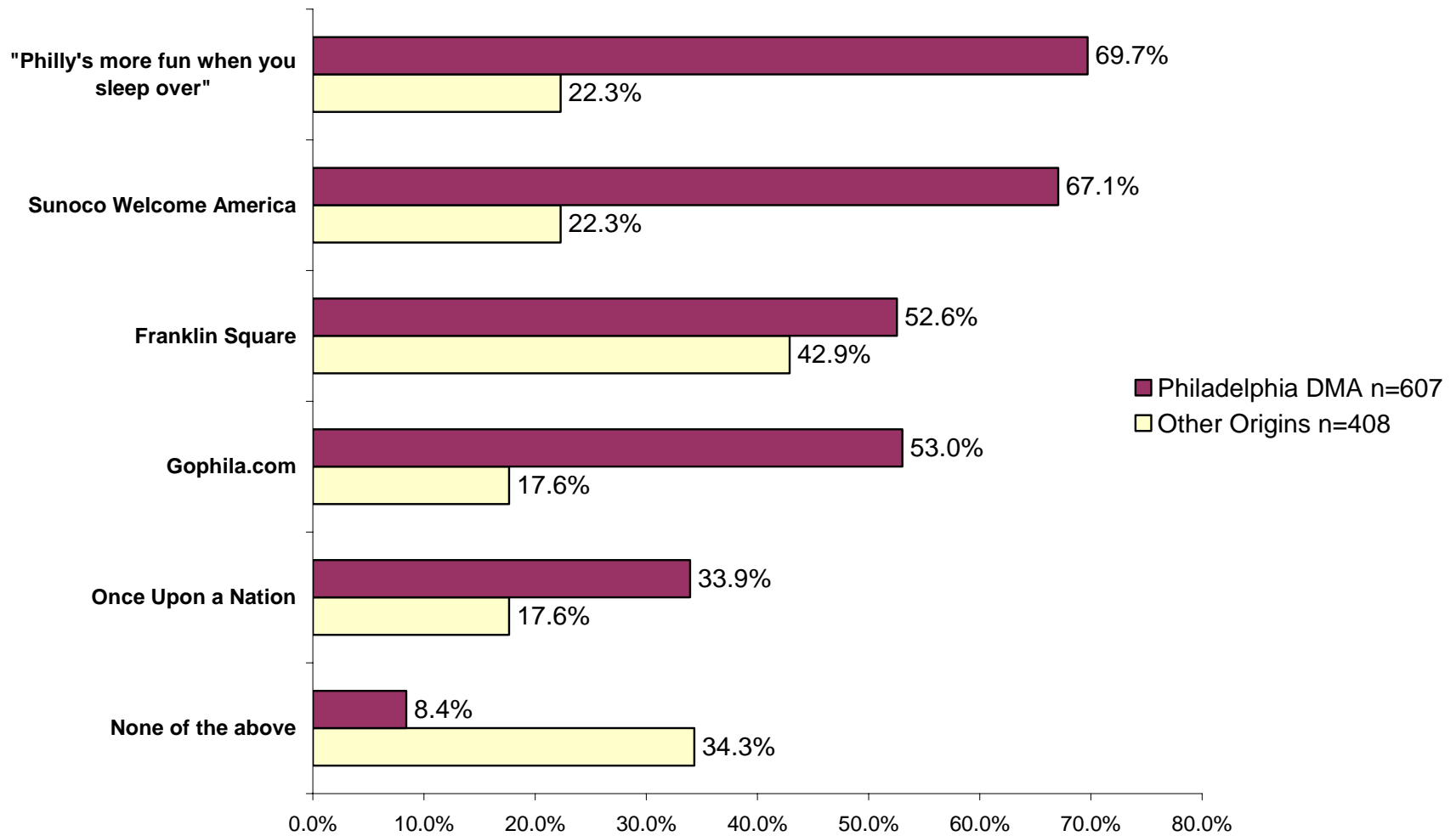
July 4th Weekend Activities



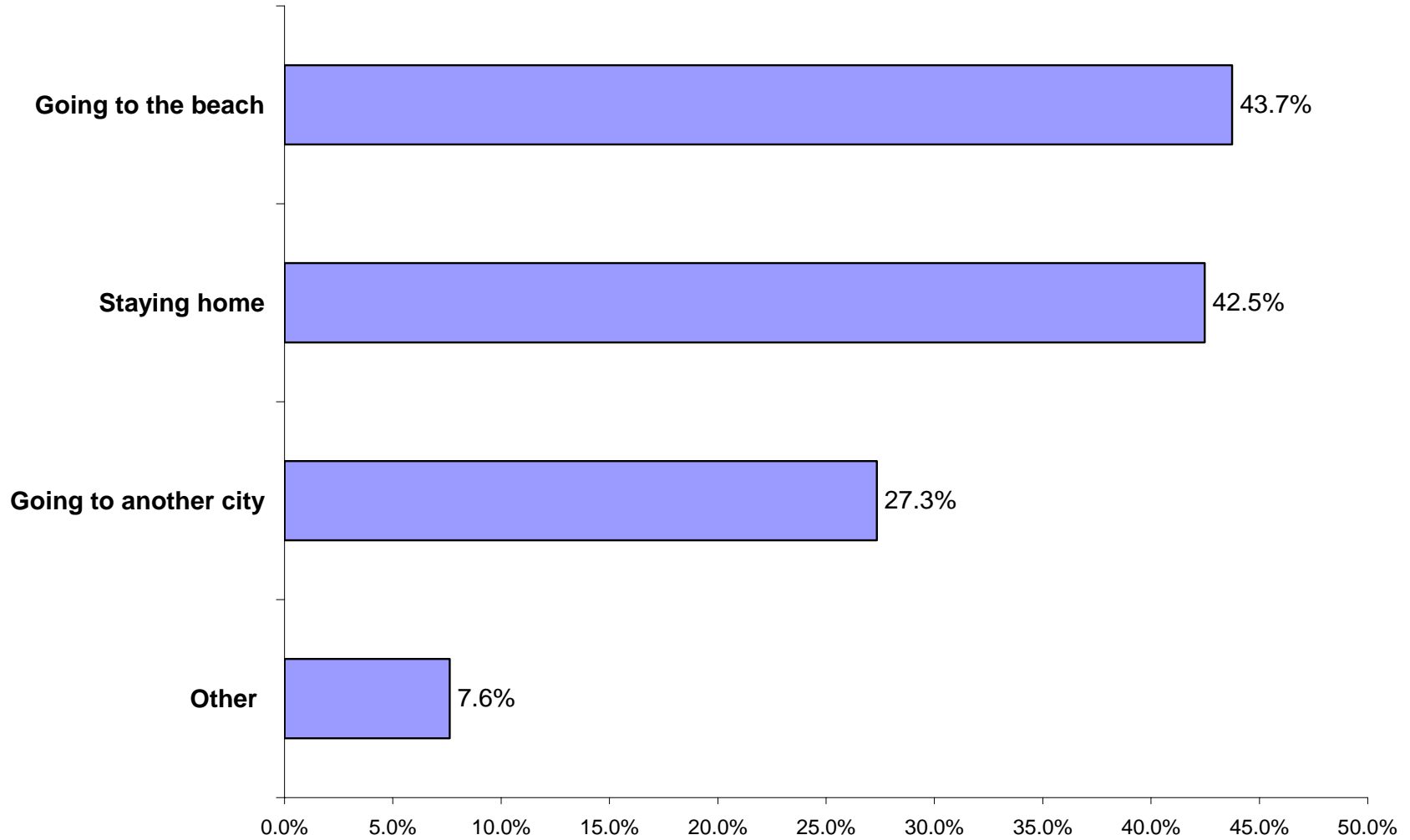
July 4th Festivity Participation



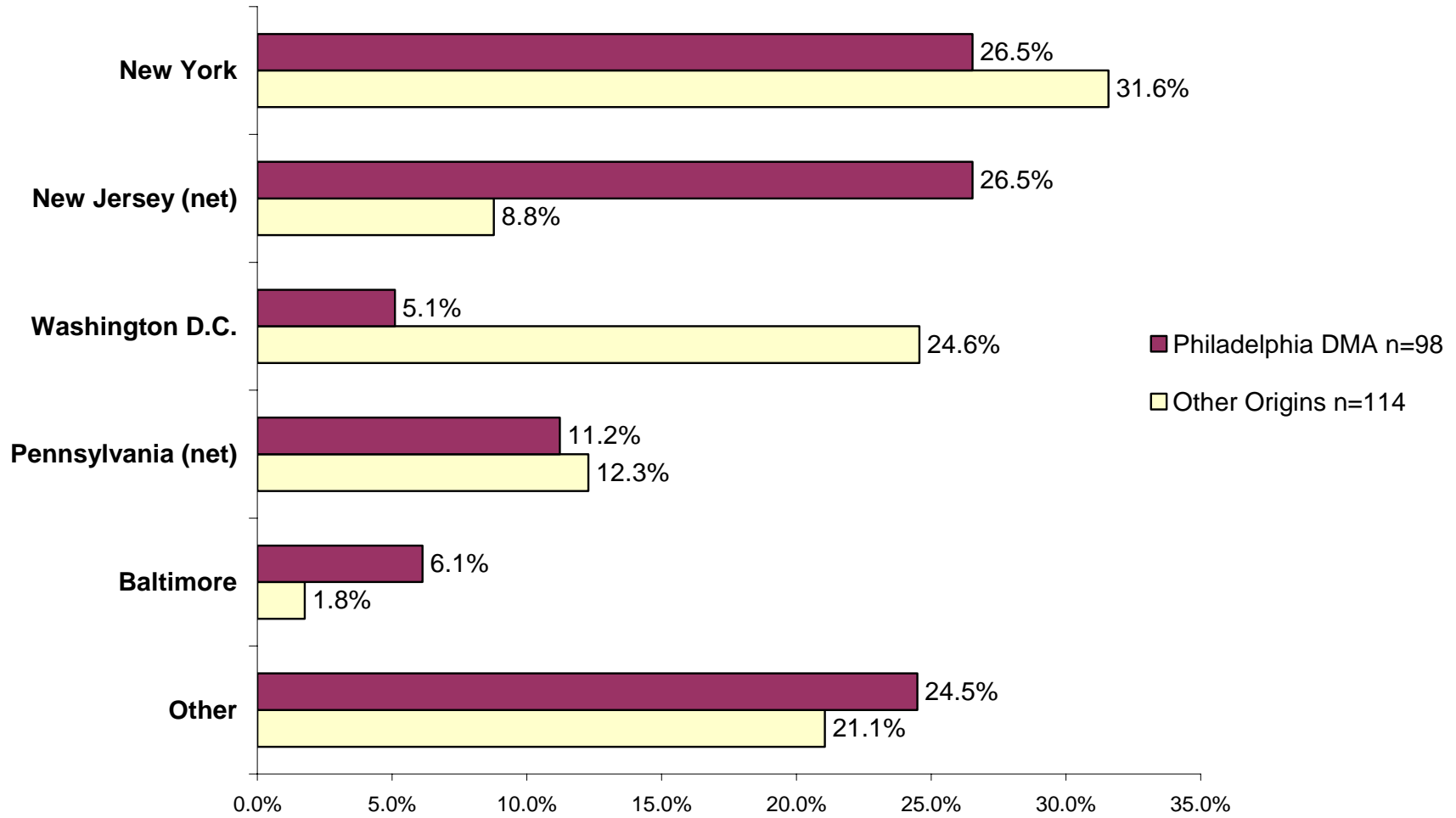
Have you heard of...



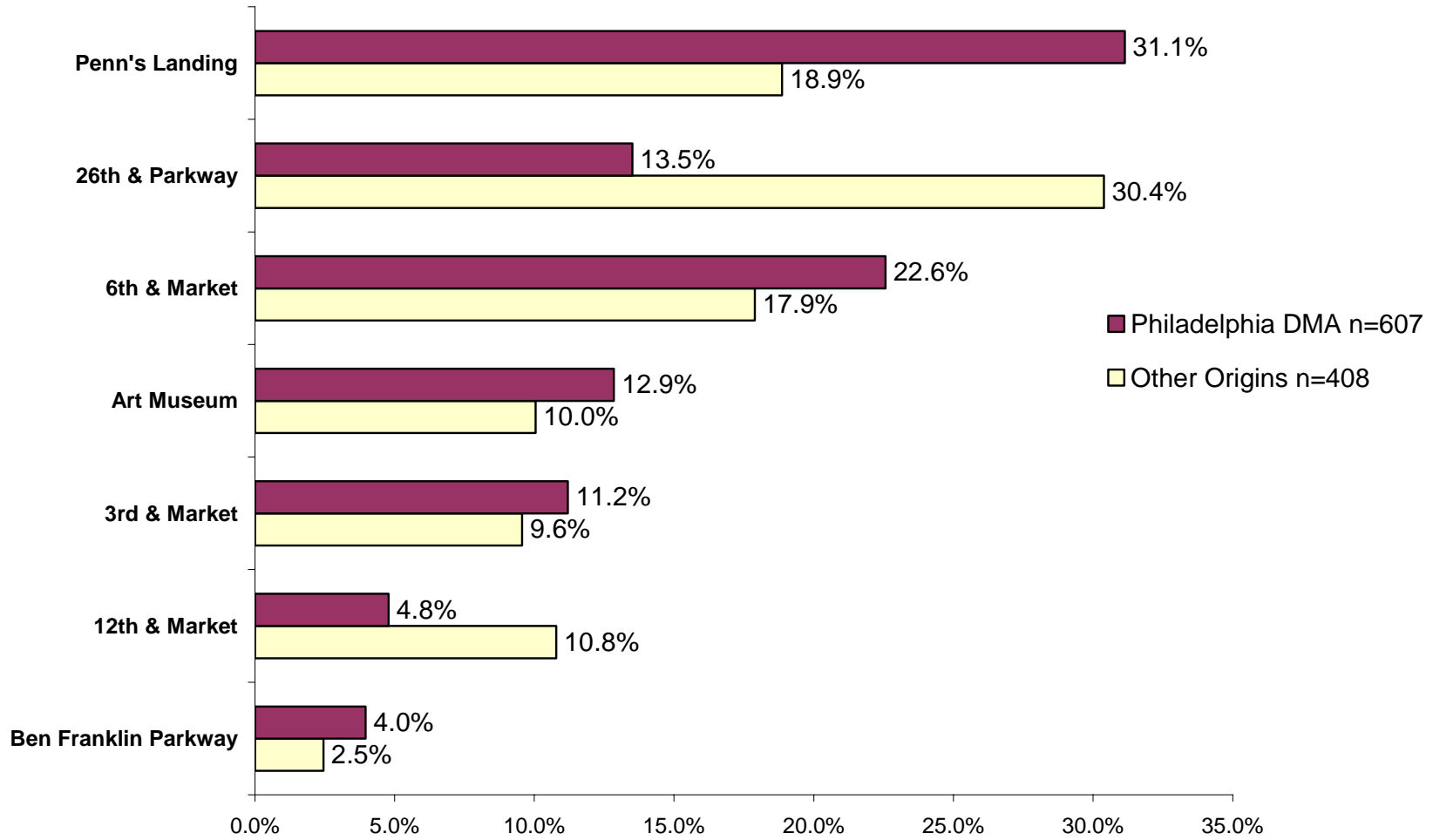
Other Activities Considered for July 4th Weekend



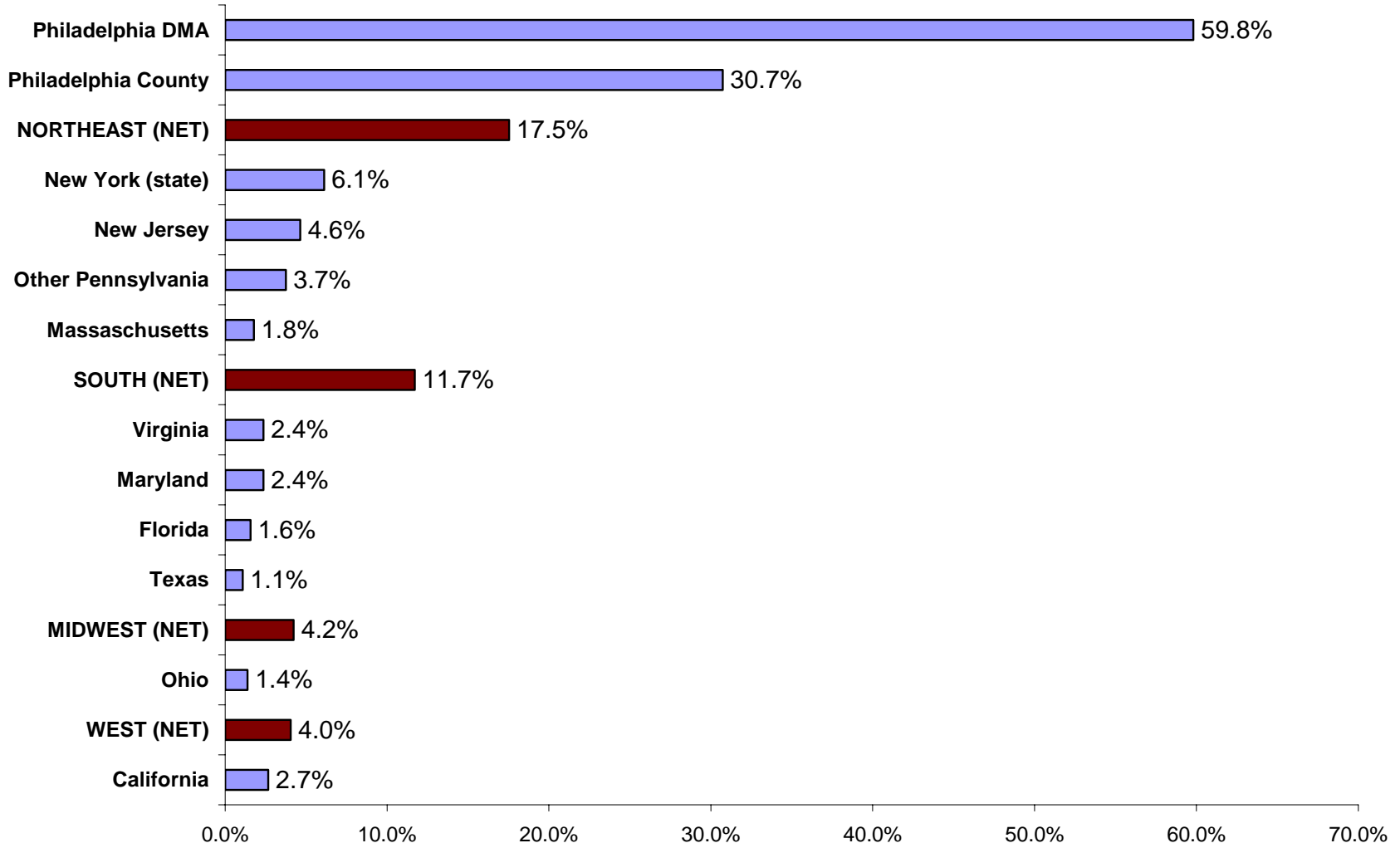
Other Destinations Considered



Intercept Location



Home Zip Code



DETAILED FINDINGS

A. Visitor Characteristics

- **Home zip code/state:** The July 4th holiday weekend brings a mix of local residents, regional residents, and out-of-towners to the events and destinations:

▪ Philadelphia DMA:	60%
○ 5 County Subset	49%
• <i>Philadelphia County</i>	31%
• <i>Surrounding Counties</i>	18%
○ Other Philadelphia DMA	11%
▪ Outside of Philadelphia DMA	40%
○ Northeast	17%
• <i>NY</i>	6%
• <i>NJ</i>	5%
• <i>Other PA</i>	4%
• <i>MA</i>	2%
• <i>All Other</i>	<1%
○ South	12%
• <i>MD</i>	2%
• <i>VA</i>	2%
• <i>FL</i>	2%
• <i>All other</i>	6%
○ Midwest	4%
○ West	4%
• <i>CA</i>	3%
• <i>All other</i>	1%

- **Hotels:** Approximately 1 in 5 visitors surveyed stayed at least one night in a hotel, with an average length of stay at just over two nights.
 - Nearly half of all visitors from outside the DMA (46%) reported that they were staying in a hotel for at least part of the weekend. By contrast, very few (4%) local resident stayed in a hotel.

Overnight Hotel Stays (%)

	Total	Reside in 5-County Region			Reside in Philadelphia DMA	
		5-County Total	Phila. County	Others	Yes	No
n=	(1025)	(497)	(312)	(185)	(607)	(408)
Staying in Hotel	21	5	4	5	4	46
1 night	7	<1	<1	1	<1	17
2 nights	5	3	2	3	2	8
3 nights	4	<1	<1	--	<1	9
4+ nights	4	<1	<1	<1	<1	9
Unspecified nights	<1	<1	<1	<1	<1	3
Mean nights (not including 0 nights)	2.3	2.2	2.4	2.0	2.2	2.3
Not staying in hotel	79	95	96	95	96	54

- **Other Activities Considered for Holiday Weekend:** To gain a sense of what – and where – Philadelphia is “competing with” in regard to July 4th tourism, participants were asked what other plans they had considered for the Holiday weekend. First, it is important to note that the majority of participants – regardless of where they are coming from – considered other options for the weekend. This suggests that despite Philadelphia’s status as the birthplace of our nation, tourism in Philadelphia over July 4th is not a “given” and that the city must continue to lure at least a segment of visitors here with the promise of great events, activities, etc.

Among Philadelphia area residents, the primary alternatives to going downtown included *going to the beach* (50%), and/or *staying home* (43%). Among participants residing outside of the Philadelphia DMA, the primary alternative was staying home, followed by *going to another city* (37%) and *going to the beach* (34%). New York and Washington, DC were the top choices among other cities (10% and 8% of mentions, respectively).

Other Holiday Choices (%)

	Total	Reside in 5-County Region			Reside in Philadelphia DMA	
		5-County Total	Phila. County	Others	Yes	No
n=	(1025)	(497)	(312)	(185)	(607)	(408)
Go to the Beach	44	49	51	46	50	34
Stay Home	43	43	36	54	43	42
Go to another City¹	27	21	23	19	21	37
New York	7	5	5	4	5	10
Washington, DC	4	1	1	1	1	8
Boston	3	2	2	2	2	3
Atlantic City	1	2	3	2	2	1
Jersey Shore	1	2	3	1	2	1
Other mentions² (including visit friends, work, have picnic, sleep, shop, etc.)	8	9	9	9	9	6
Did not consider other options	14	14	17	9	13	17

¹ Mentioned by at least 1% of respondents

² None mentioned by more than 1% of participants

- **Make-up of Touring Party (at time of interview):** Clearly, the July 4th Holiday Weekend is a time for celebrating with lots of people – regardless of whether visitors are local or not. As part of the interview, participants were asked who they had with them at that particular moment in time. Half of all respondents (50%) were here with family; the percentage is slightly higher (55%) among people who do not live in the Philadelphia DMA. A third of all participants (31%) were celebrating with friends, and 14% of respondents were downtown with both friends and family.
- In keeping with the social nature of the holiday, people came downtown in large groups; nearly half of all participants (47%) reported that they were with at least 3 companions.
 - Visitors from outside of the Philadelphia DMA were even more likely to be downtown in large groups; 55% (versus 42% of locals) said they had at least 3 additional people with them.

Size and Make-up of Touring Party (%)

	Total	Reside in 5-County Region			Reside in Philadelphia DMA	
		5-County Total	Phila. County	Others	Yes	No
n=	(1025)	(497)	(312)	(185)	(607)	(408)
Alone	5	7	8	3	6	3
With Family	50	43	43	43	47	55
With Friends	31	35	35	35	32	31
With Both Friends and Family	14	16	14	18	16	11
Total Companions (not including respondent)						
1	26	31	30	34	30	21
2	21	21	23	19	22	21
3 – 4	26	22	22	21	22	32
5+	21	19	17	23	20	23

B. Weekend Plans

- **Activities:** First, participants were asked to report the events and destinations they had already attended, or planned to attend sometime over the course of the weekend. Clearly, the special Sunoco Welcome America 4th of July Festivities were a big draw; over three-quarters of all participants (77%) said that they planned to attend at least one event. *Taste of Philadelphia* was the most popular special event, drawing over half (52%) of all participants; the *Penn's Landing Concert* on July 1 was also a hit, with 41% of visitors saying they had already or planned to go.

Visitation to the historic district was also popular, with 50% of participants saying they planned to go. Visits with friends/family, and museums, follow with 39% and 32% of mentions, respectively.

Interestingly, most of these downtown visitors did not plan to leave the City; only 18% said they were going to the suburbs and only 15% to the Jersey Shore.

- There are some notable trends with regard to the choice of weekend activities among different segments of respondents:
 - The special 4th of July Festivities – across the board – seemed to have greater appeal to residents of the Philadelphia DMA; for example, 50% of Philadelphia DMA residents went to/planned on going to the Penn's Landing concert, versus only 27% of participants residing outside of the Philadelphia DMA. Conversely, hotel visitors were less likely to attend the special events.
 - Out-of-town visitors were far more likely than locals to visit Philadelphia's permanent attractions such as the historic district (68% versus 38%) and museums (50% of out-of-towners visited, vs. 19% of locals).
 - The 4th of July Festivities were more popular with smaller groups; for example, respondents touring with fewer than 4 companions were more likely to go to *Taste of Philadelphia* (57% vs. 41% of larger groups) and *Lionel Richie/Fireworks* (31% vs. 7%).

Activities/Destinations During Holiday Weekend (%)

	Total	Reside in 5-County Region			Reside in Philadelphia DMA		Staying in Hotel	
		5-County Total	Phila. County	Others	Yes	No	Yes	No
n=	(1025)	(497)	(312)	(185)	(607)	(408)	(213)	(796)
4th of July Festivities	77	89	91	85	87	63	70	79
Taste of Phila	52	61	63	58	59	42	43	54
Penn's Landing concert	41	53	58	45	50	27	36	43
Lionel Ritchie/Fireworks	28	36	37	33	34	18	23	29
Fiesta on Parkway	15	20	23	16	20	8	10	16
Gospel at Mann	3	5	7	3	5	1	2	4
Visit Historic District	50	37	35	40	38	68	67	46
Visit loved ones	39	40	44	33	38	40	30	41
Visit Museum	32	19	21	17	19	50	53	26
Visit suburbs/countryside	18	19	10	33	17	20	14	19
Go to Jersey Shore	15	12	14	10	15	13	11	15
Hiking/Biking/outdoor activities	13	17	21	11	16	8	9	14

Activities/Destinations During Holiday Weekend (%) – Cont.

	n=	Currently Touring with...			Size of Group	
		Family (497)	Friends (307)	Both (136)	0 – 3 (656)	4+ (330)
4th of July Festivities		74	79	82	81	70
Taste of Phila		48	56	56	57	41
Penn’s Landing concert		38	39	49	41	39
Lionel Ritchie/Fireworks		25	30	27	31	21
Fiesta on Parkway		11	17	18	19	7
Gospel at Mann		2	6	1	4	2
Visit Historic District		55	47	43	50	52
Visit loved ones		36	40	50	34	49
Visit Museum		33	31	28	31	35
Visit suburbs/countryside		18	17	26	17	22
Go to Jersey Shore		15	14	15	14	16
Hiking/Biking/outdoor activities		10	15	21	12	14

- **Best Thing about Being in Philadelphia over July 4th**: To gain a sense of what are the top draws for tourists in the area over the Holiday, participants were asked to note the single “best thing” about being Philadelphia over the July 4th weekend. First it is important to note that approximately 40% of respondents could not select a single thing, and instead selected multiple options. When the data are analyzed separately (respondents who selected one “best reason,” and respondents who selected multiple “best reasons”), the relative position of each choice is consistent across both groups, suggesting that “*all of the historical sites and events*” really are the primary draw, and “*it’s the best place for a party*” is not the major factor for most respondents.
- Among Philadelphia County residents, the Fireworks are the biggest draw (39%), as well as the fact that *everything is free (35%)*. The further away participants live from downtown Philadelphia, however, the greater the draw of *all the historical sites and events* – in other words, the things that are here year round. Outside of the Philadelphia DMA, 58% of all respondents and 46% of respondents choosing only one answer cite historical sites and events as the reason to be here; other reasons are clearly secondary.

Best Thing about Being in Philadelphia over July 4th Weekend (%)

All participants, including those providing **multiple responses**

	Total	Reside in 5-County Region			Reside in Philadelphia DMA	
		5-County Total	Phila. County	Others	Yes	No
n=	(1025)	(497)	(312)	(185)	(607)	(408)
All of the historical sites and events	43	32	26	43	33	58
Everything is free	32	35	35	34	33	31
Being in America’s birthplace on America’s birthday	31	32	31	32	32	31
Fireworks	28	37	39	33	36	16
Because Philly is more Fun	18	21	21	23	22	11
Live Music (Lionel Ritchie, Fantasia, Philly Pops, etc.)	16	21	23	20	19	12
It’s the best place for a party	12	16	15	18	15	8

Best Thing about Being in Philadelphia over July 4th Weekend (%)

Participants who selected **only one option**

	Total	Reside in 5-County Region			Reside in Philadelphia DMA	
		5-County Total	Phila. County	Others	Yes	No
n=	(602)	(284)	(181)	(103)	(352)	(244)
All of the historical sites and events	31	18	13	27	20	46
Everything is free	20	21	22	19	21	18
Being in America's birthplace on America's birthday	18	17	18	17	18	19
Fireworks	13	18	20	13	17	6
Because Philly is more Fun	10	13	12	14	13	6
Live Music (Lionel Ritchie, Fantasia, Philly Pops, etc.)	5	7	8	4	6	3
It's the best place for a party	4	6	6	7	5	3

C. Awareness of Communications, Destinations and Events

- **Familiarity:** Participants were read a number of phrases and asked to report which they had heard of. (They were not asked any follow-up questions.) Among Philadelphia area residents, “*Philly’s more fun when you sleep over,*” and Sunoco Welcome America are familiar to roughly 7 in 10 participants (70% and 67% of DMA residents, respectively). Franklin Square and GoPhila.com are known to about half of local participants (53% in DMA each), and Once Upon a Nation is familiar to approximately one-third (34% in DMA).

Outside of the DMA, Franklin Square is the best known... with 43% of respondents saying they had heard of it. The remaining items are familiar to approximately 1 in 5 out-of-towners.

Awareness of Communications, Destinations and Events (%)

	Total	Reside in 5-County Region			Reside in Philadelphia DMA	
		5-County Total	Phila. County	Others	Yes	No
n=	(1025)	(497)	(312)	(185)	(607)	(408)
<i>“Philly’s more fun when you sleep over”</i>	51	70	68	73	70	22
Sunoco Welcome America	49	69	69	70	67	22
Franklin Square	49	52	53	50	53	43
GoPhila.com	39	54	51	58	53	18
Once Upon a Nation	27	35	35	36	34	18