



Greater Philadelphia
Tourism Marketing Corp

visitphilly.com

Visitphilly.com Hotel Visitor Surveys

Summer 2010

Background



- The survey covers visitphilly.com hotel bookings from Memorial Day to Labor Day
 - 1,588 hotel reservations made on visitphilly.com for 2,938 room nights and \$434,419.15 in hotel revenues
 - ADR on visitphilly.com was \$149 during the time period, which is slightly higher than Center City ADR which was reported as \$137 during this time period.
- In most instances comparisons are made to hotel surveys from previous years. Those labeled “summer” cover bookings between Memorial and Labor days. Those labeled “winter” cover bookings between November and March.
- Survey findings are specific to visitphilly.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 visitphilly.com at the close of the summer.
- A total of 1,496 invitations were sent out, with 314 completes for a response rate of 21%
- As an incentive, respondents were offered a two night stay at the Loews hotel which included \$300 in American Express Gift Cards for use during their stay.
- Percentages in the report are rounded, which may lead to totals above/below 100%
- This is the 12th consecutive season that GPTMC has conducted a survey of hotel visitors, with a total sample over 6,500.



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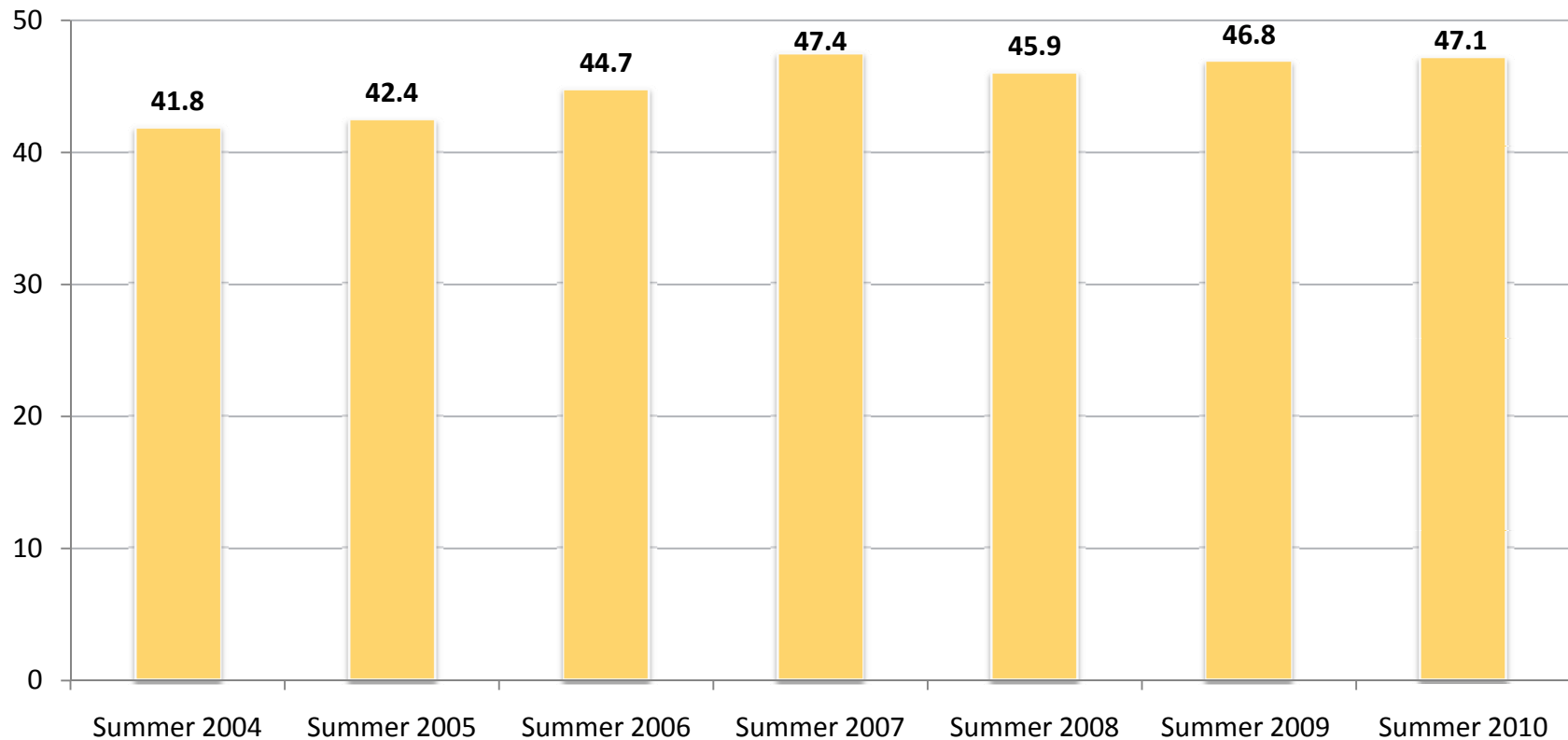
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Visitor Demographics

Average Age



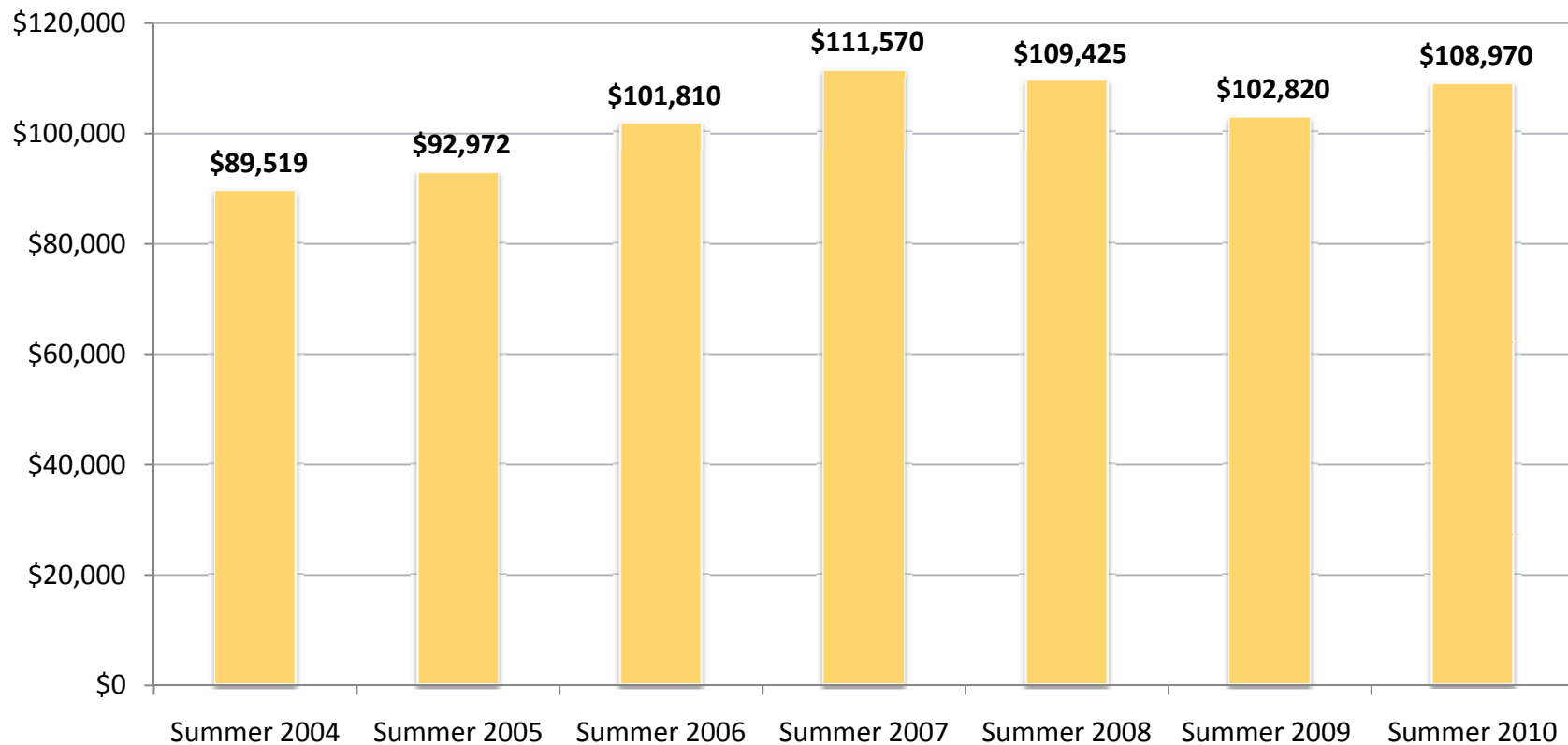
- Since the start of the GPTMC's Hotel Surveys in 2004, average age has increased by about 5 years.



Average Annual Household Income



- Household income rebounded close to 2008 levels, well above summers 2004-05, when Philly Overnight was a discount package.



Geography of Visitors



- Compared to last summer, there was a slight increase in the number of respondents visiting from Washington DC, and a decrease in those coming from Philadelphia.
- Visitation from “other markets” has been growing over time

DMA	Summer 2006	Summer 2007	Summer 2008	Summer 2009	Summer 2010
Philadelphia	27%	14%	20%	19%	15%
New York	24%	23%	24%	21%	22%
Harrisburg	8%	8%	7%	8%	6%
Washington D.C.	5%	16%	8%	6%	10%
Baltimore	4%	4%	3%	3%	3%
Boston	3%	2%	2%	2%	3%
Other Markets	29%	32%	36%	41%	42%



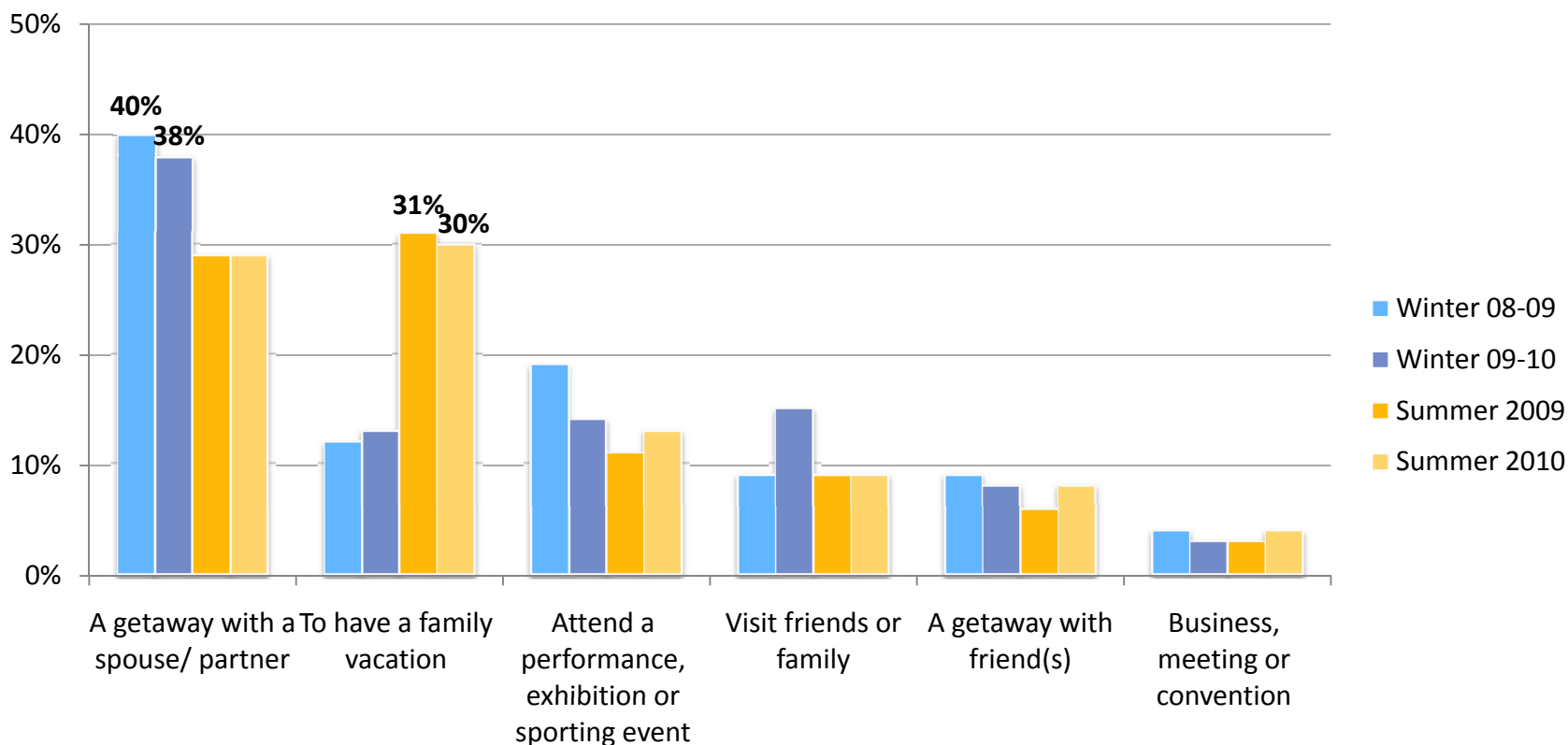
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Trip Experience

Reason For Visit

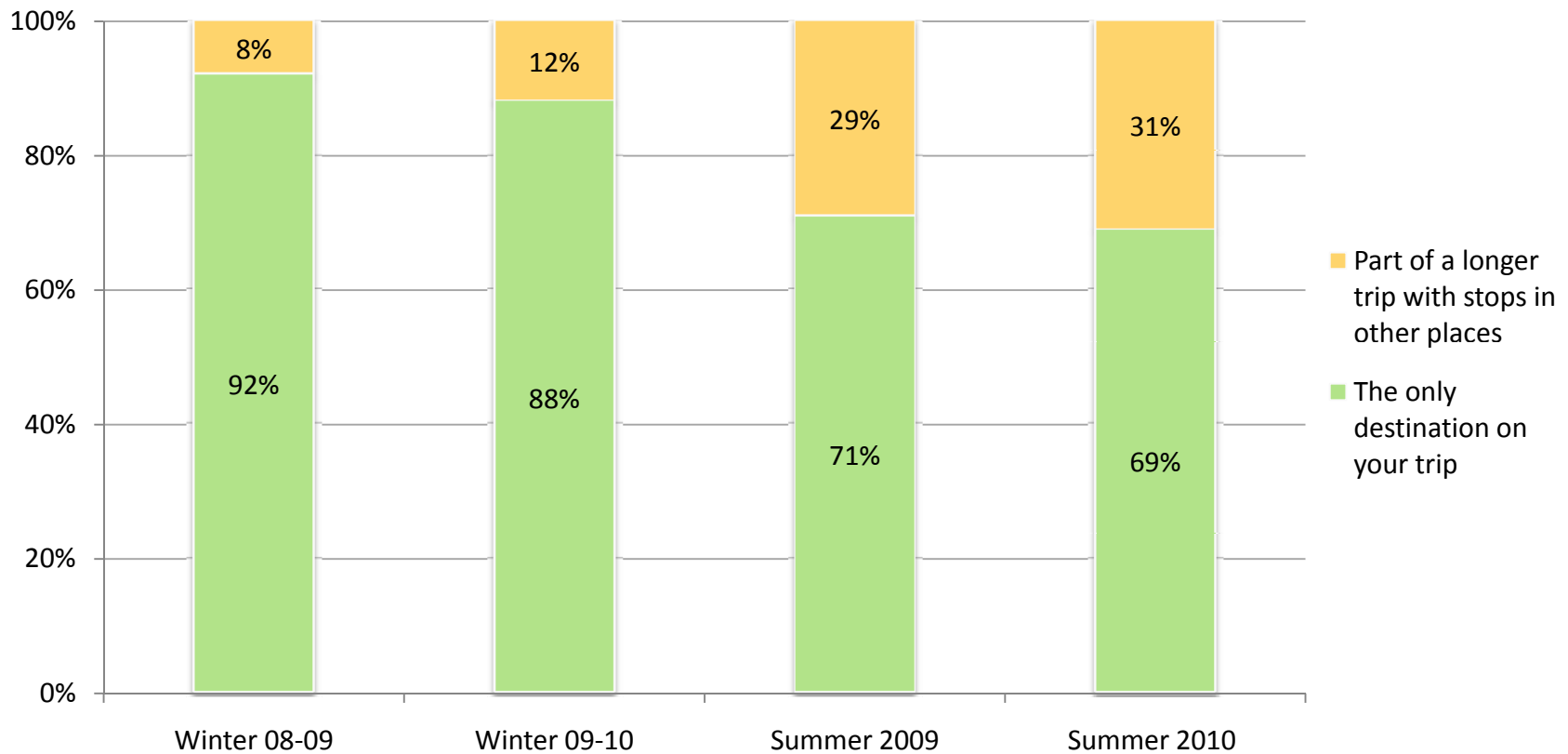
- Reason for visitation seems to vary based on season. Summer trips are typically to *have a family vacation*, where winter trips are more about *a getaway with a spouse or partner*.



Type of Visit to Philadelphia



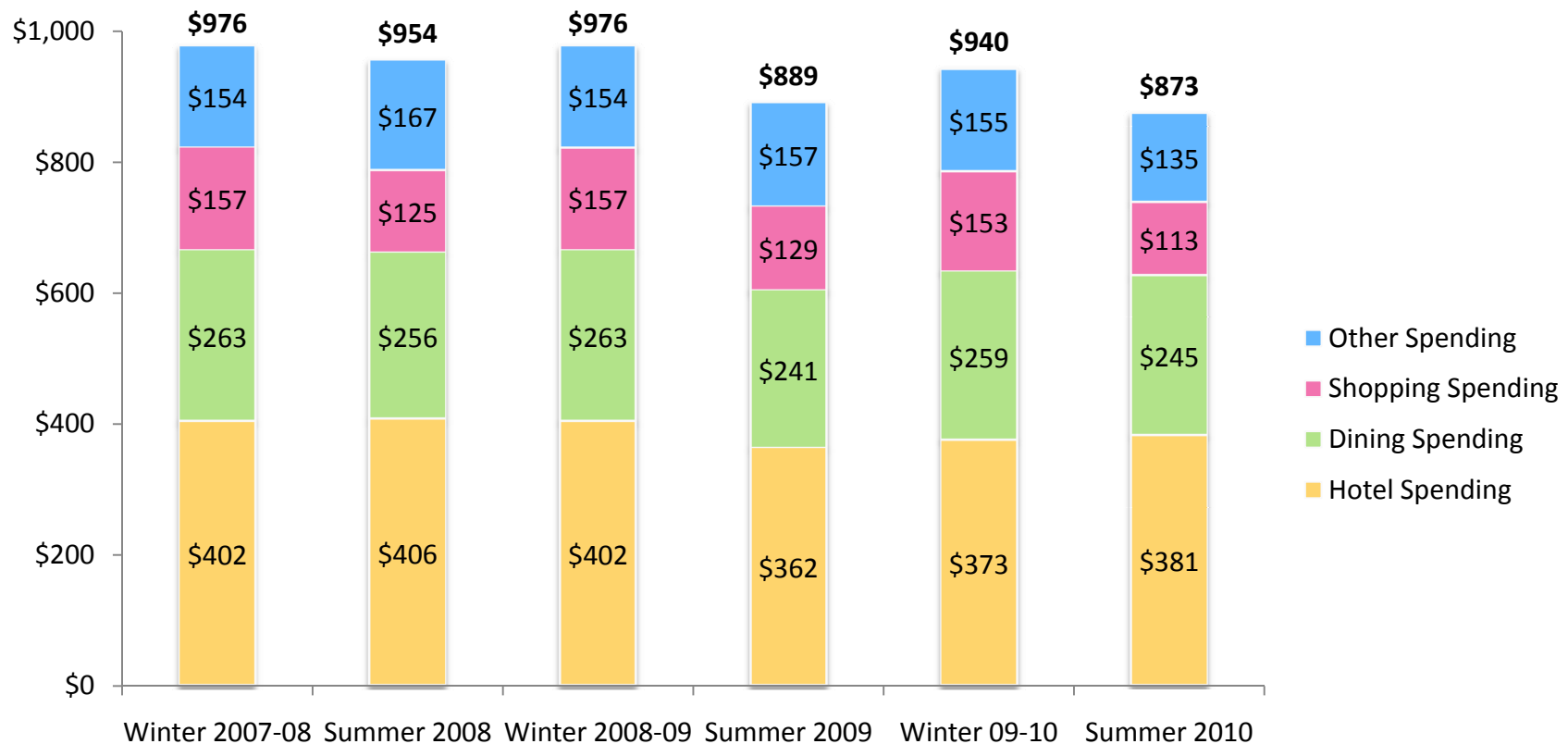
- Summer respondents are much more likely to visit Philadelphia on a longer trip that also includes stops in other places.



Hotel Visitor Spending



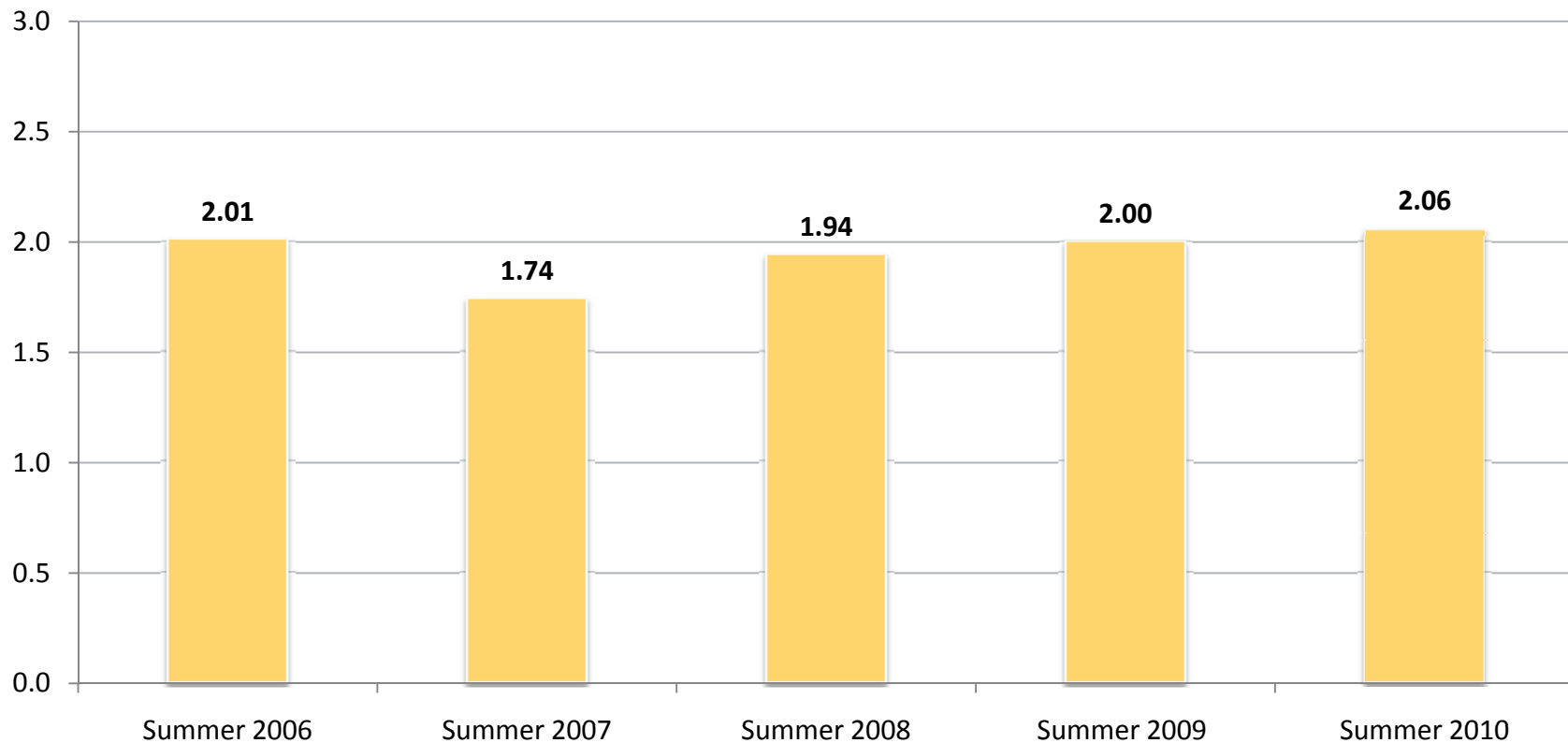
- Overall, spending this summer was similar to the summer of 2009, though hotel spending has increased slightly. Spending on discretionary items like shopping and entertainment has been in decline since 2008.



Average Nights Spent in Philadelphia



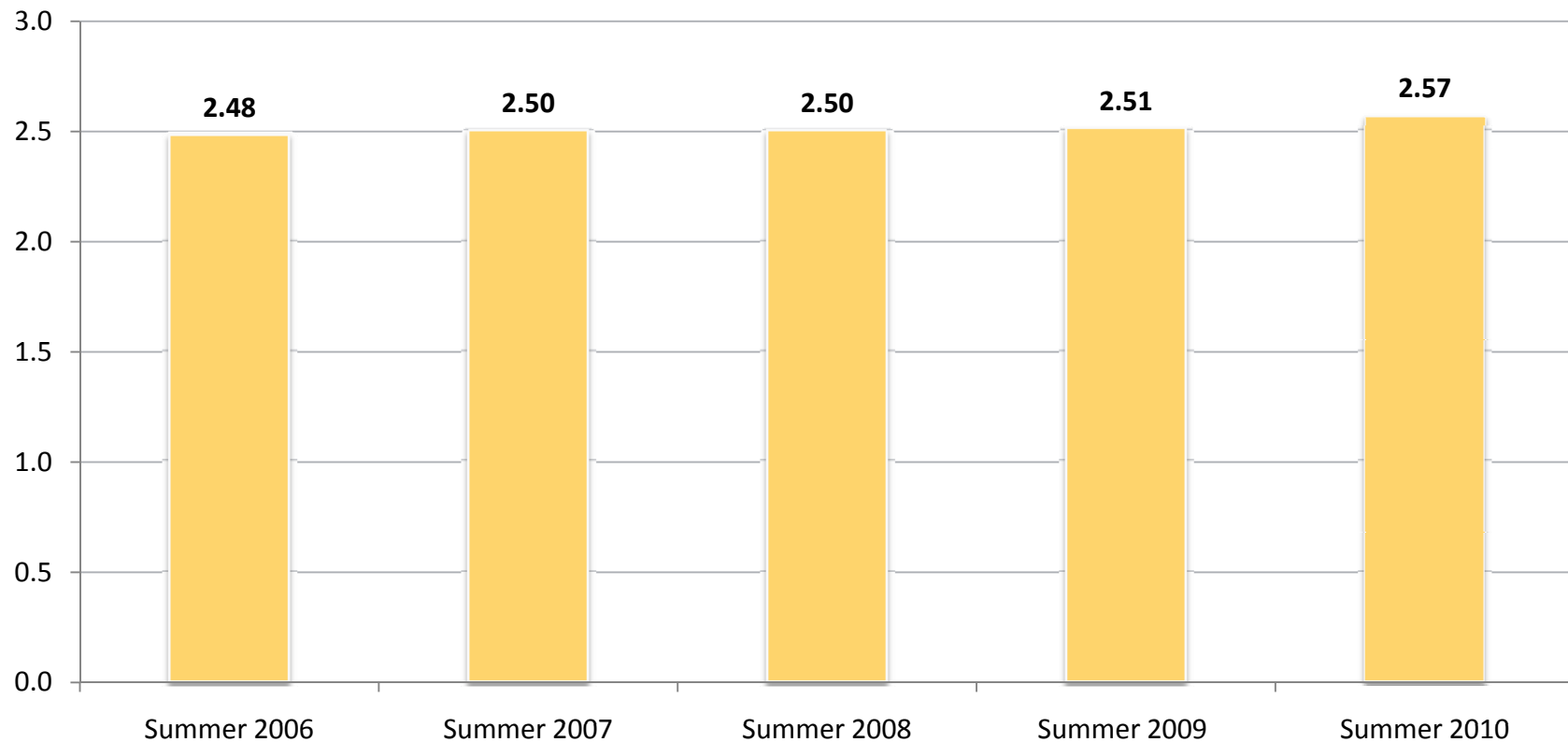
- Average nights in Philadelphia has increased steadily since the summer of 2007, reaching just over two nights this summer.



Average Party Size



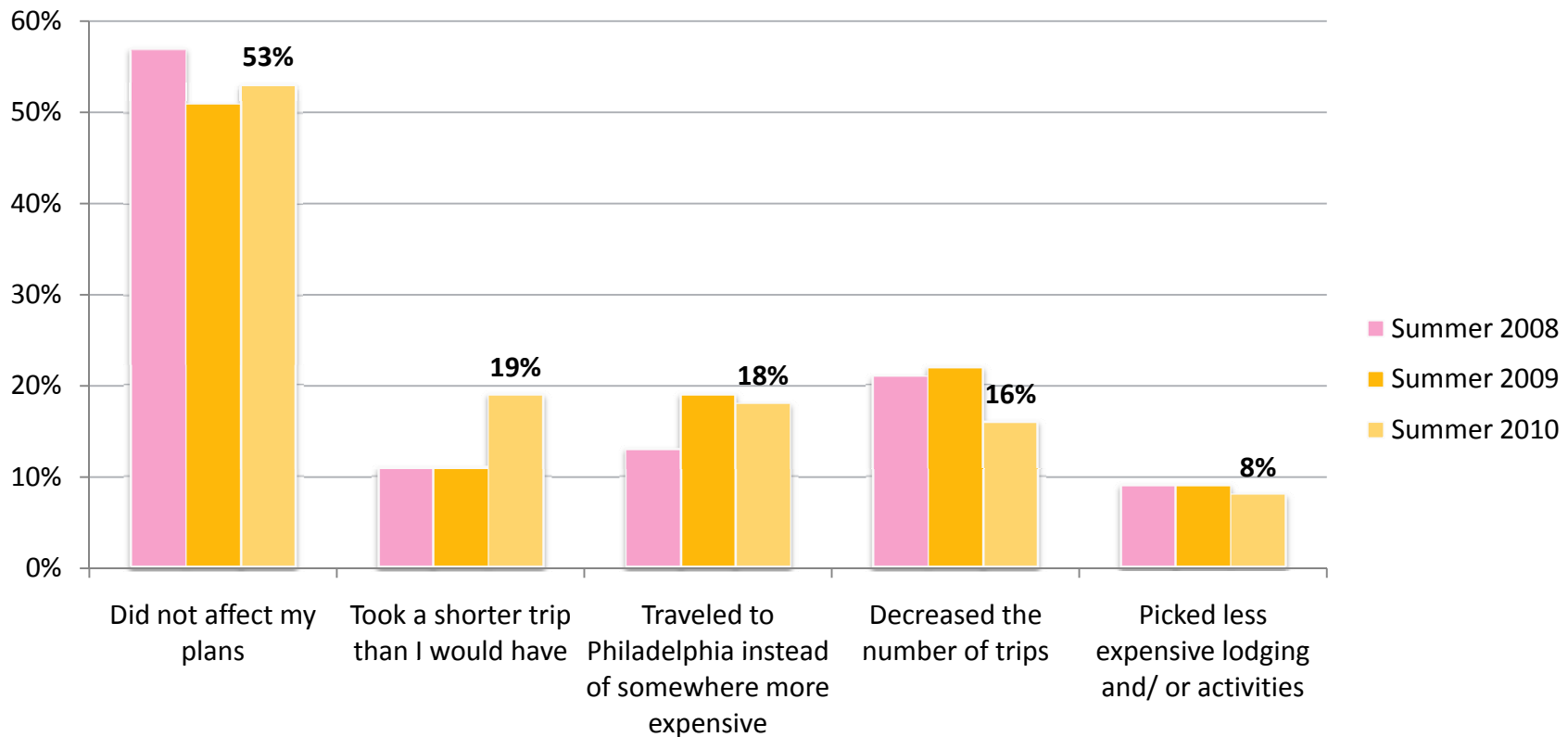
- Average party size has also increased slightly over the past five summers.



Impact of Economy on Summer Plans



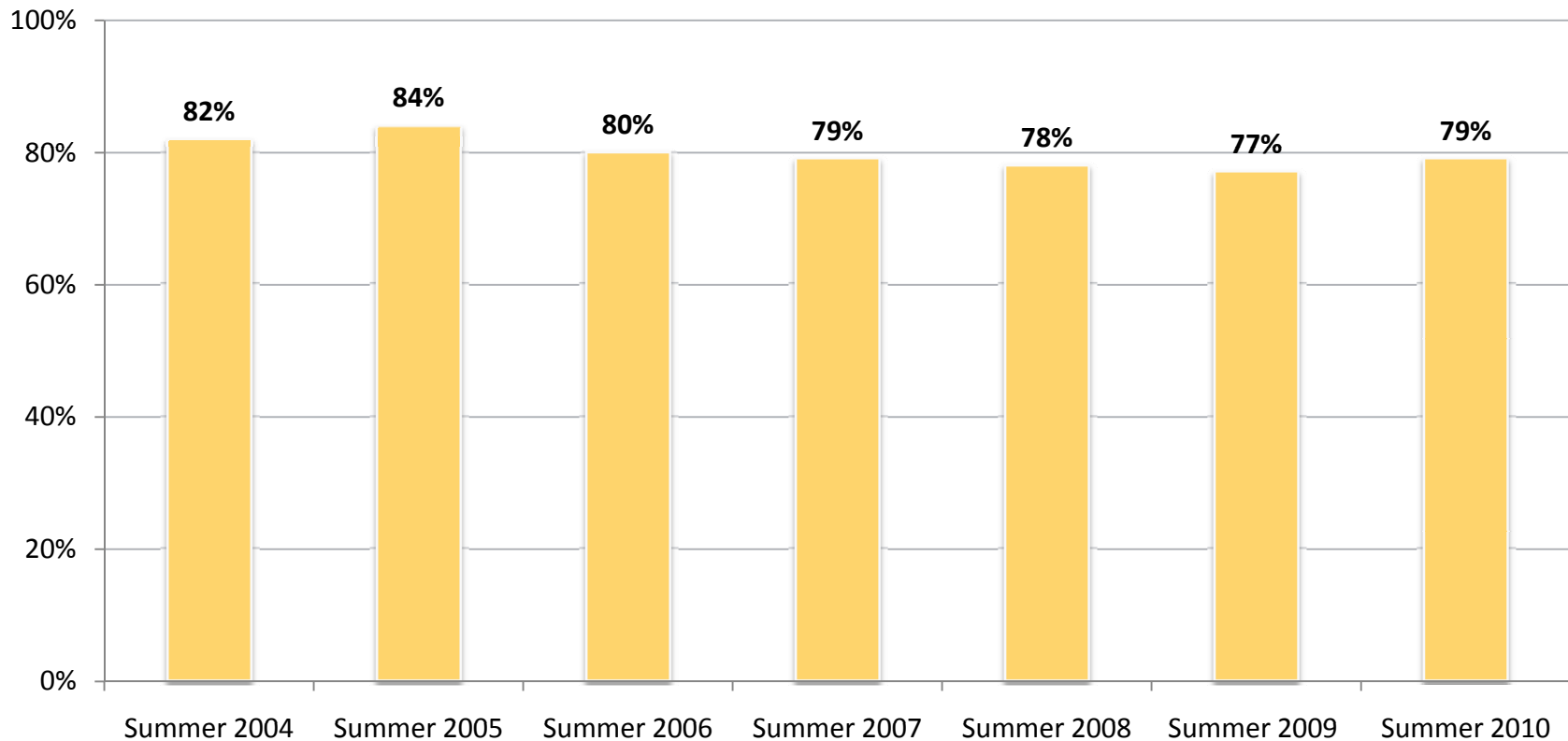
- Just over half of respondents said the economy did not affect their summer plans.
- Among those affected, there was an increase in those saying they took a shorter trip, but fewer people said they decreased their number of trips.



Traveled to Philadelphia by Personal Vehicle



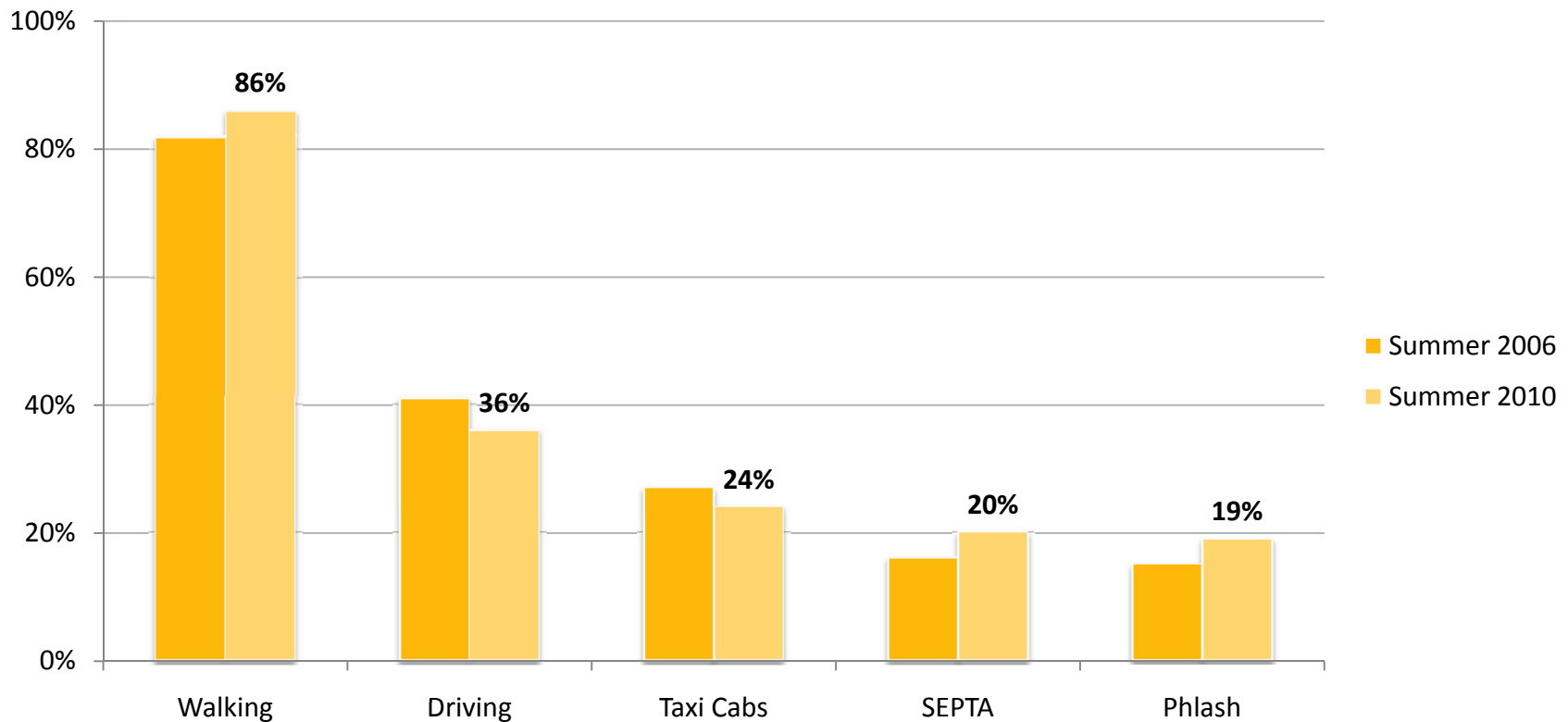
- Philadelphia is consistently a drive destination, with around 80% of visitors arriving with their personal vehicle each summer.



Ways Traveled Around Philadelphia



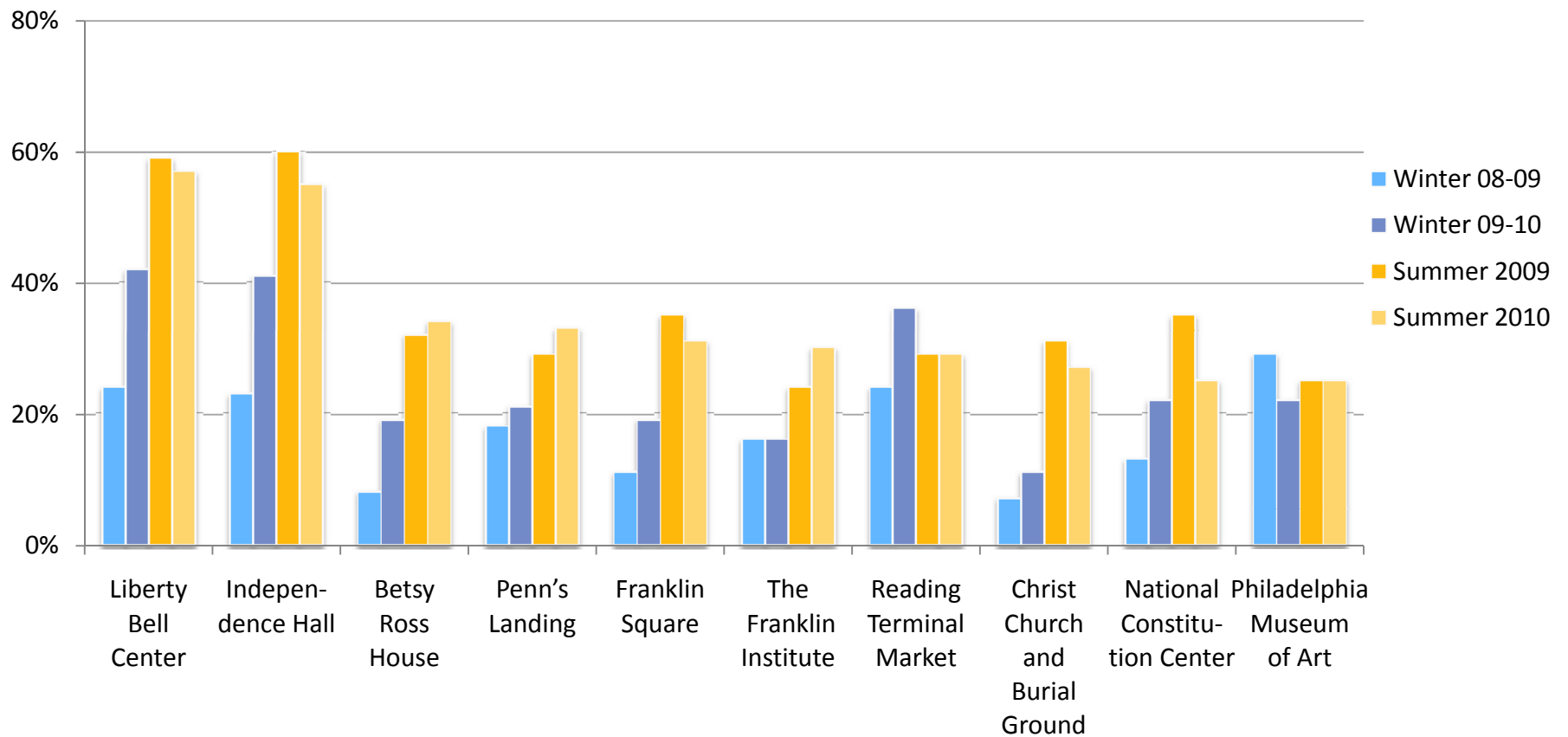
- Compared to 2006, more people report walking, using SEPTA, and taking the Phlash to navigate around Philadelphia during their trip.



Attractions Visited



- Visitation to attractions is typically higher in summer months, particularly those in the historic district.

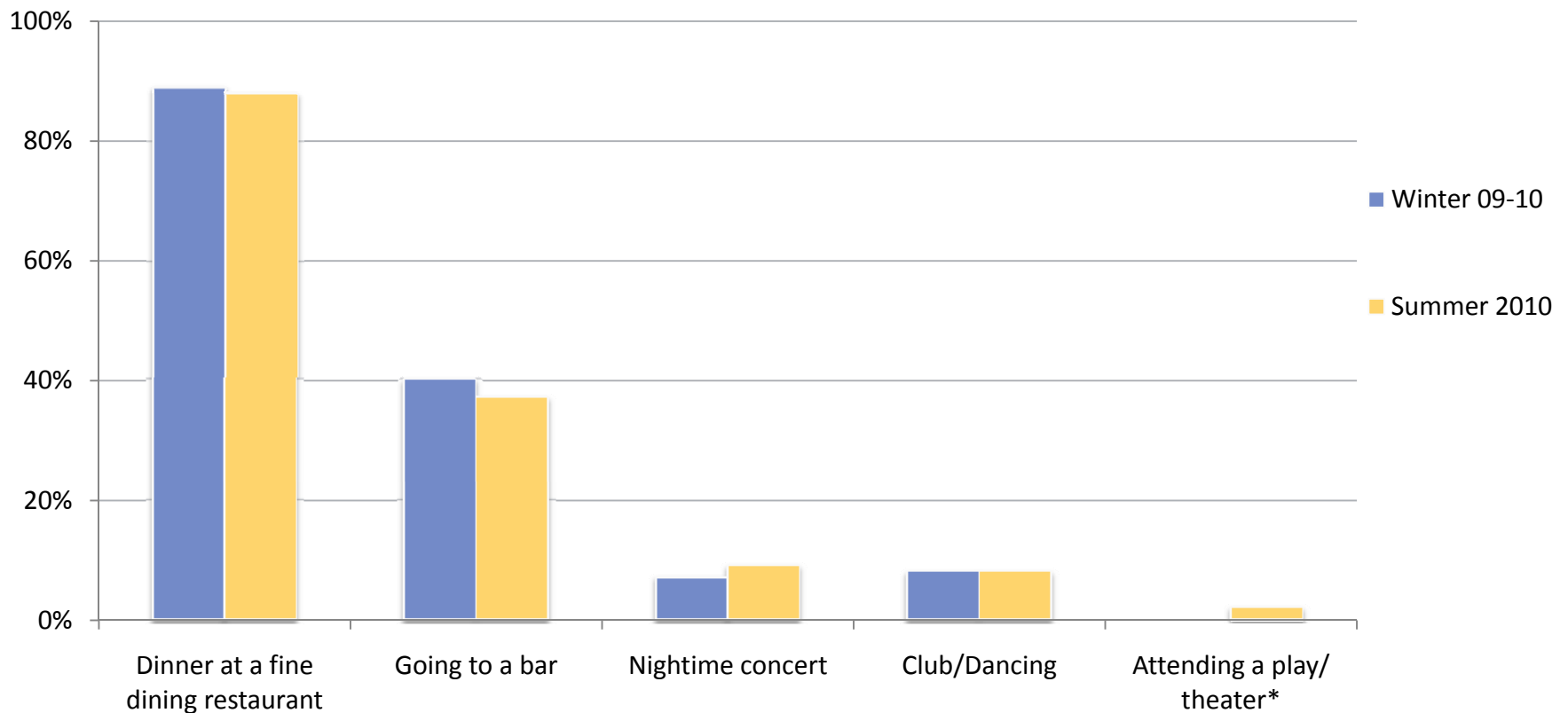


Source: visitphilly.com hotel visitor surveys

Nighttime Activities



- Fine dining and going to a bar are the most popular nighttime activities. Participation in nighttime activities varied only slightly among the winter and summer seasons.

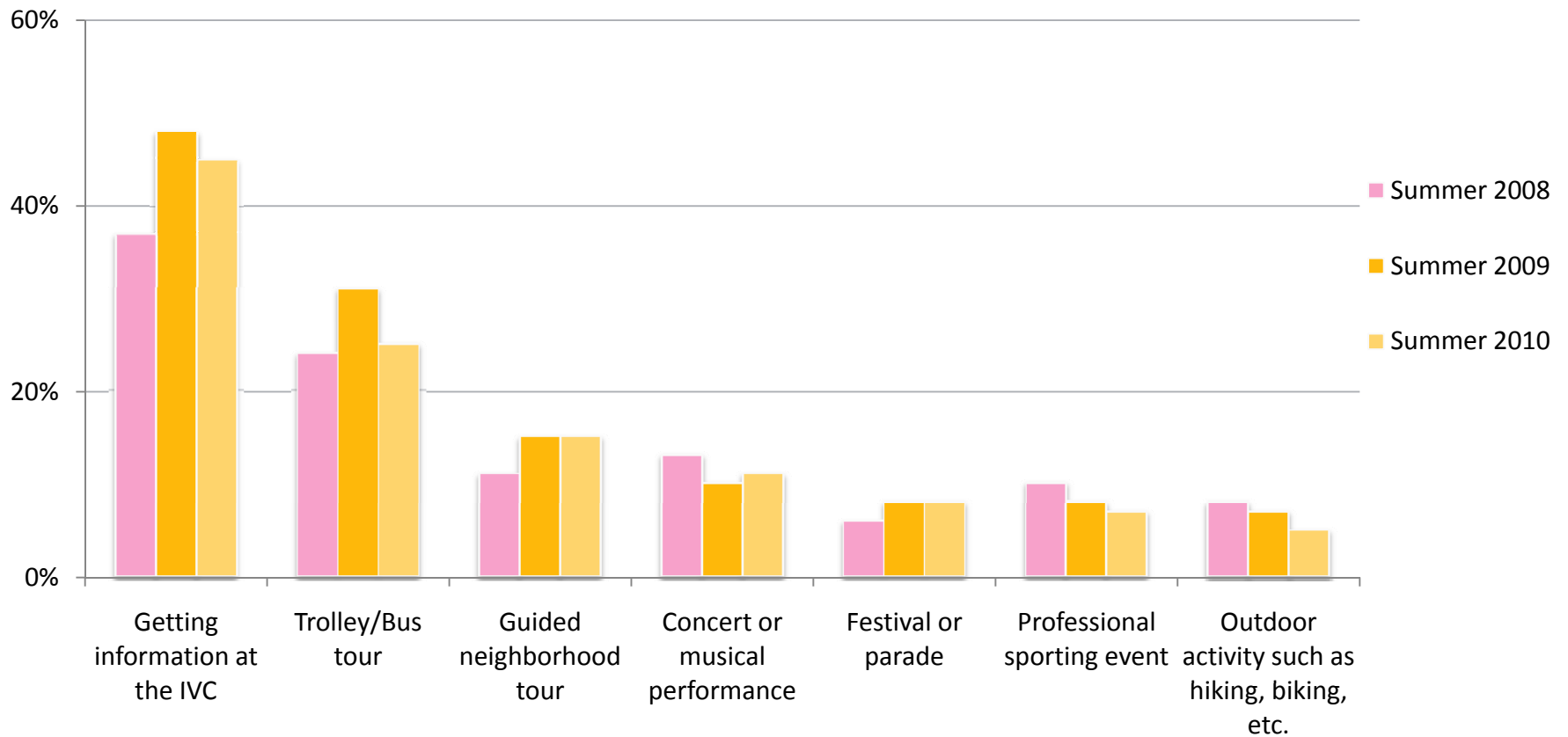


*Answer choice was not asked in Winter 09-10
Source: visitphilly.com hotel visitor surveys

Activities Participated In



- Nearly half, 45%, of visitors this past summer got information at the IVC.
- Bus and neighborhood tours are the most popular summer activities.

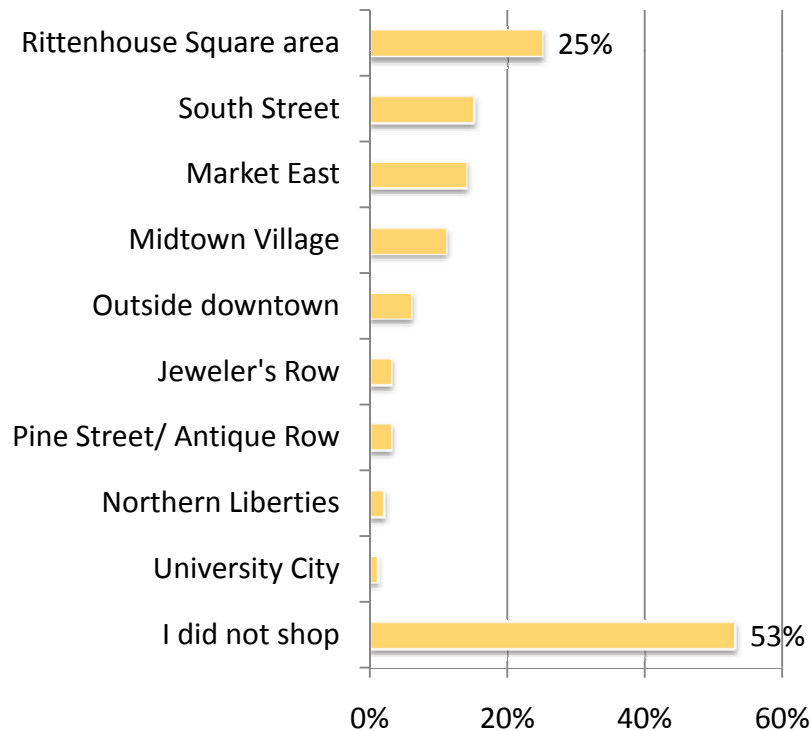


Summer 2010 Shopping Habits

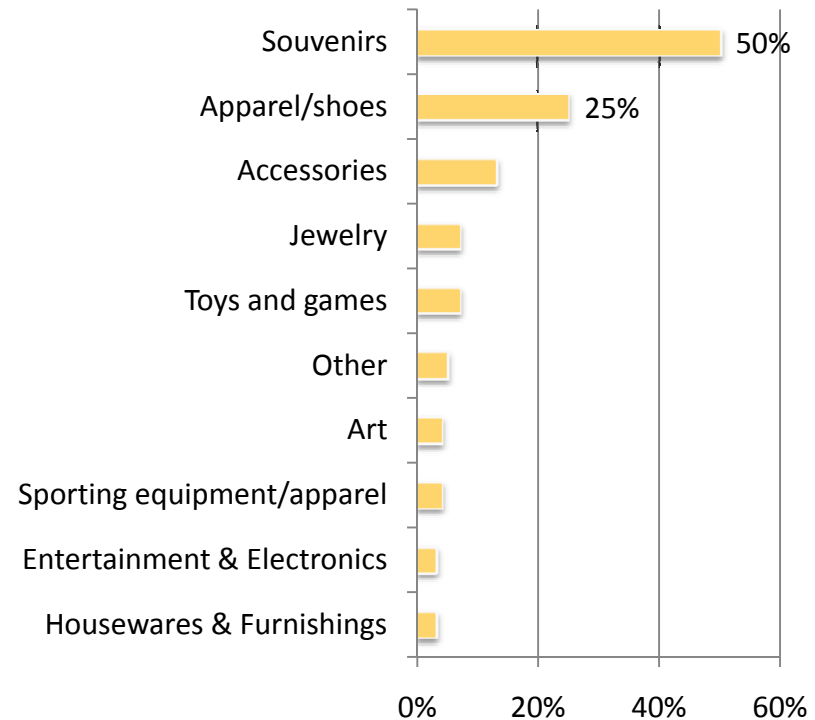


- The Rittenhouse Square area was the most popular location for shopping.
- Half of visitors purchased souvenirs, and apparel was the second most popular purchase type.

Places Shopped



Types of Purchases





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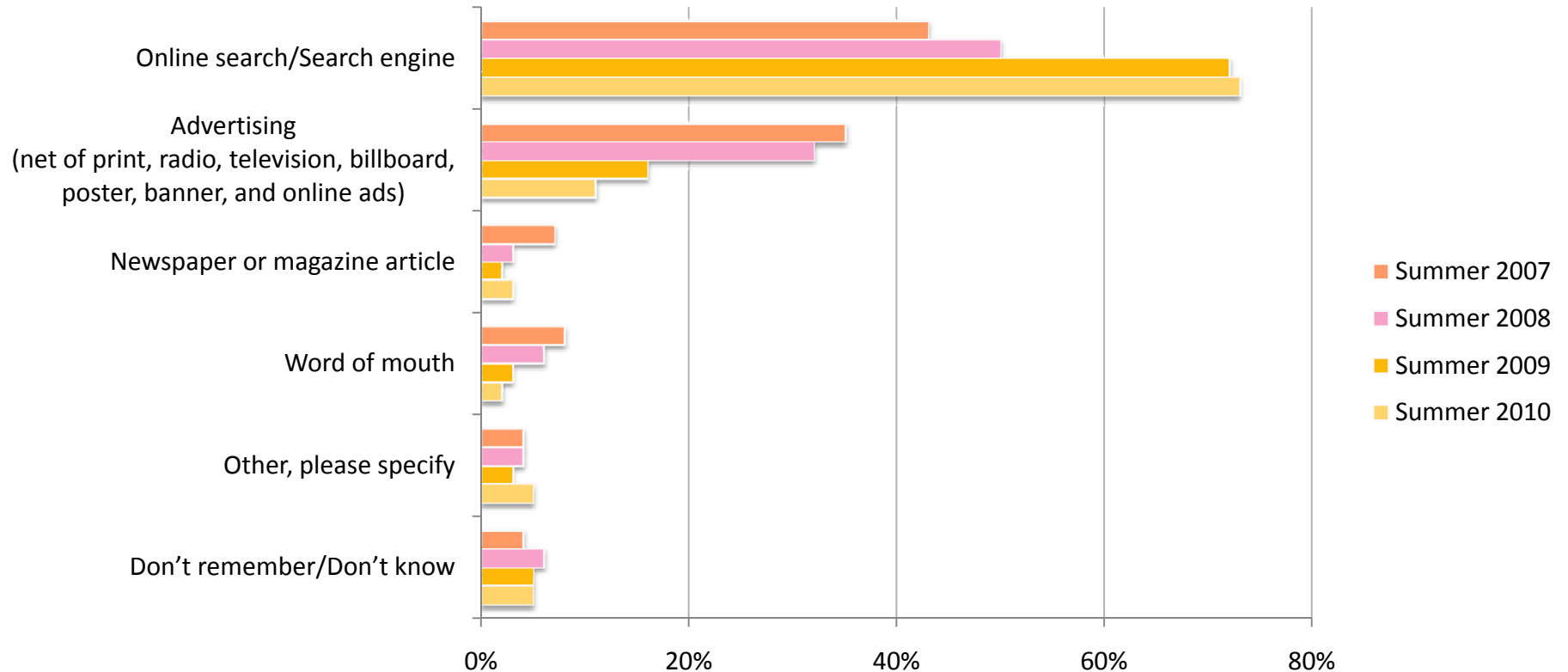
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Trip Planning

Learning About Website



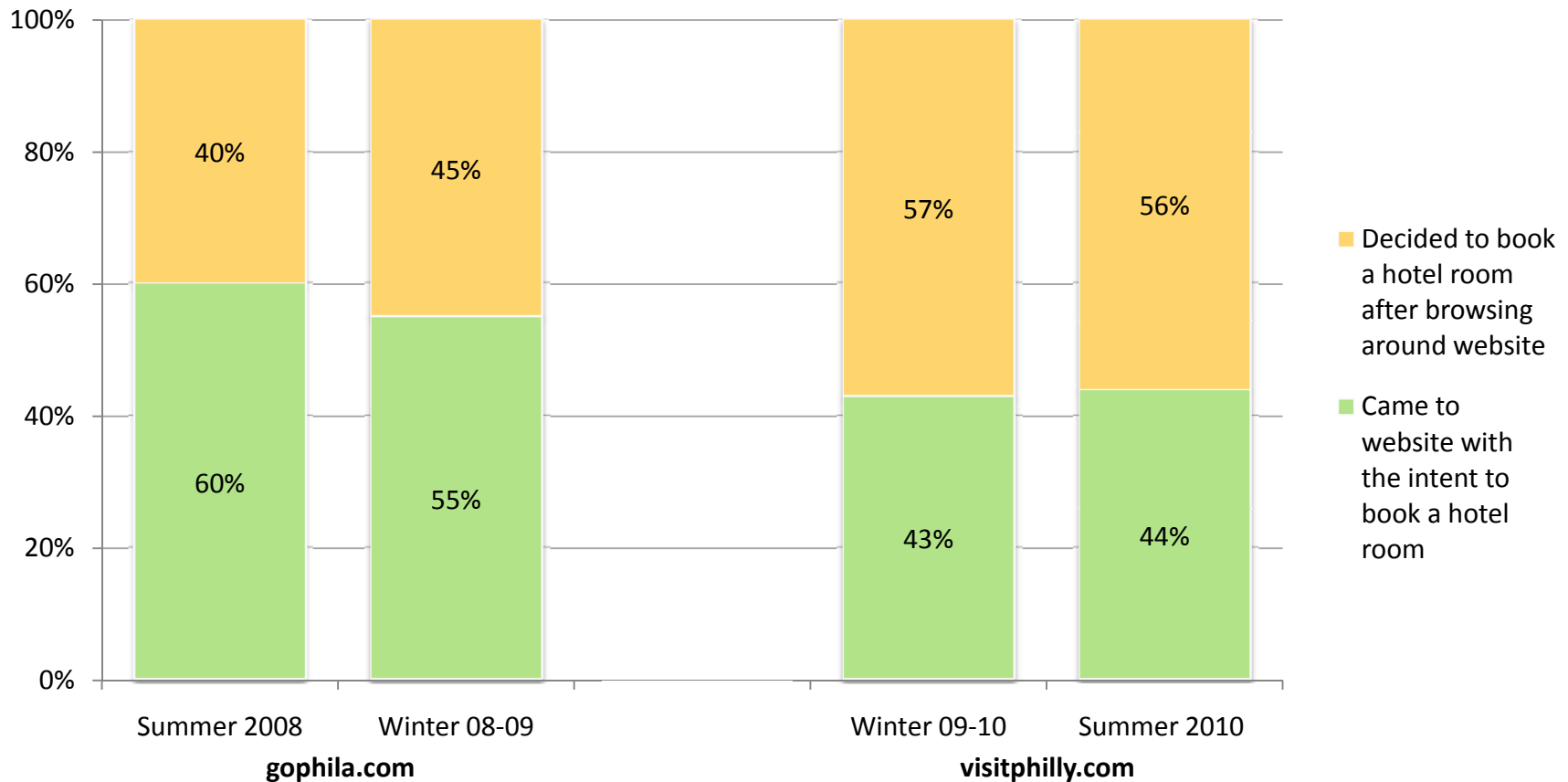
- Over the past two summers, online search has been the dominant way that visitors first learned about the website.
- This matches our web analytics, which show that about 70% of visitors arrive at the site from a search engine.



Booking Experience



- Between 55 and 60% of respondents who booked through gophila came to website with the intent to book a room. However, visitphilly bookers were more likely (56-57%) to decide to book a room after browsing around the website.

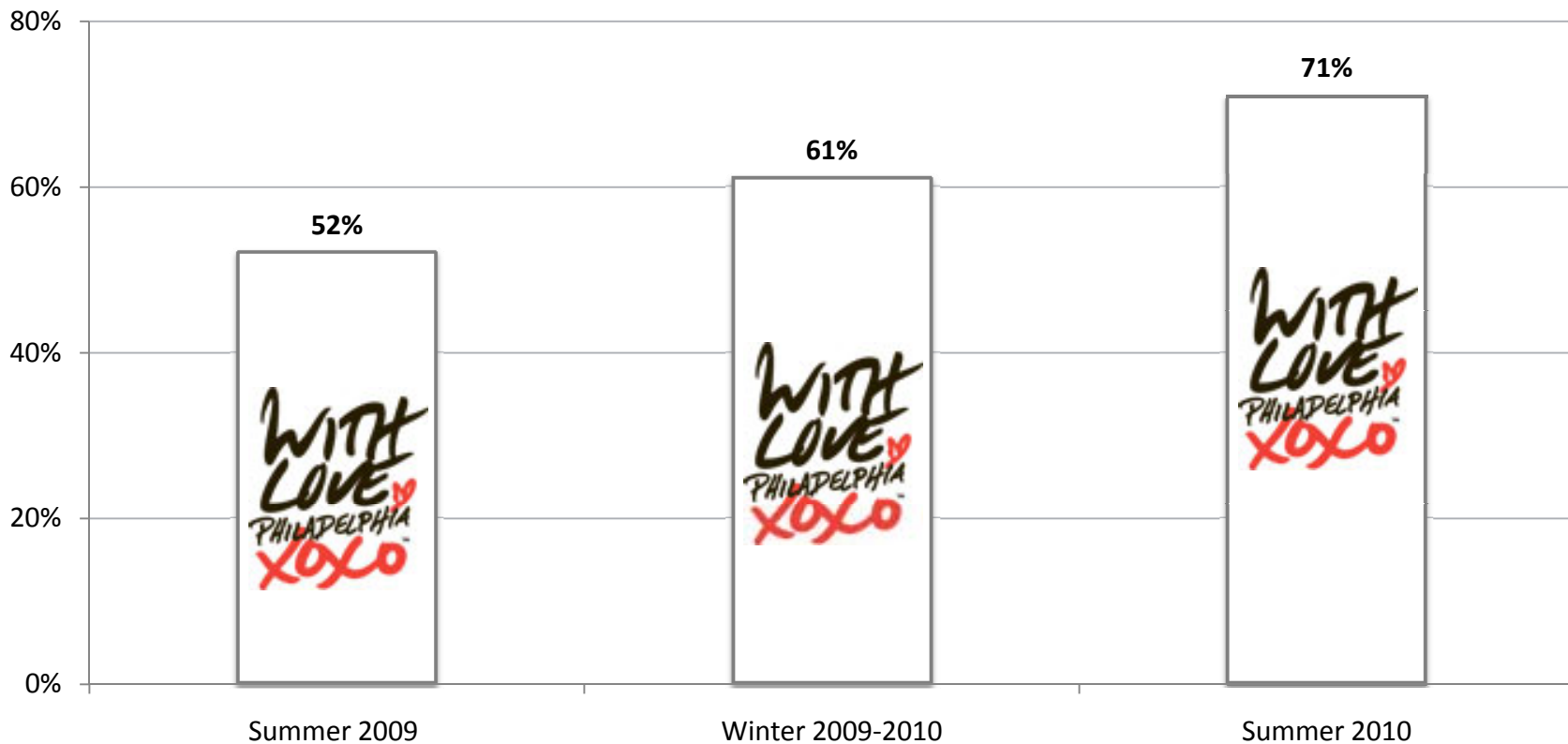


Source: visitphilly.com hotel visitor surveys

Awareness of With Love Logo



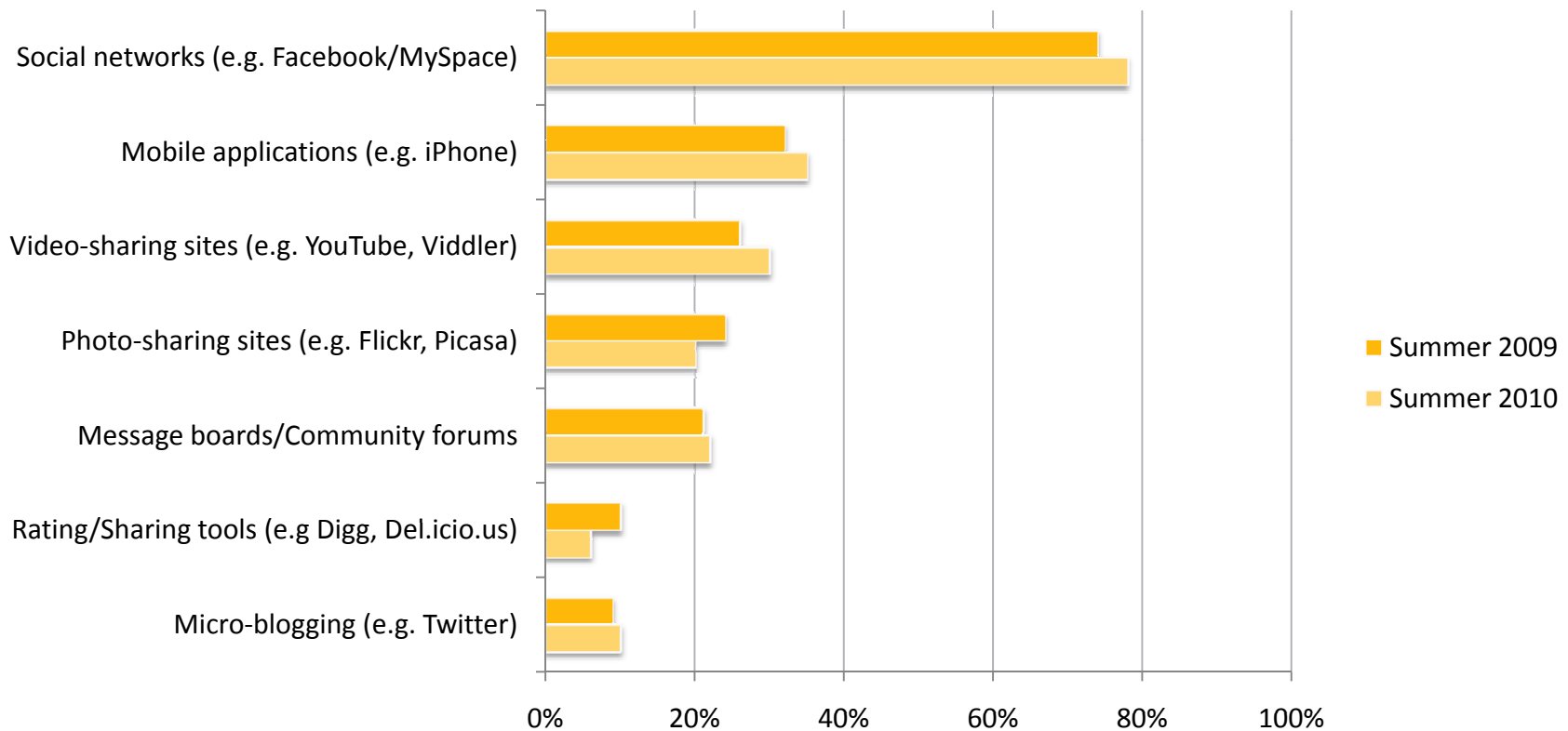
- Awareness of the With Love logo continues to grow as the brand builds.
- Since the introduction of the campaign last summer, familiarity with the logo grew from 52% to 71%.



Use of Tools/Applications



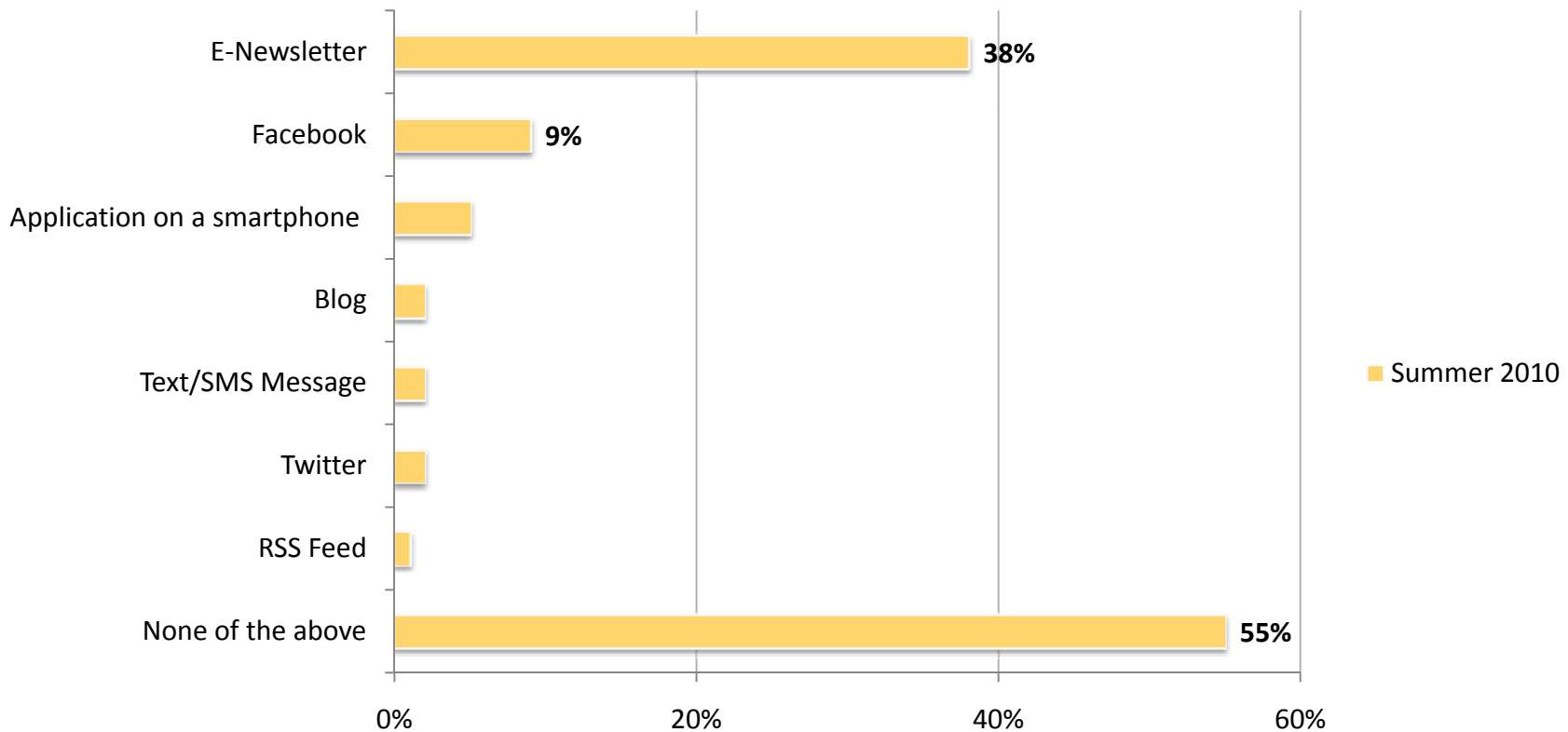
- Use of social tools and applications continues to grow, with the exception of photo sharing sites and rating tools.



Interest in Receiving Travel Information via New Media Channels



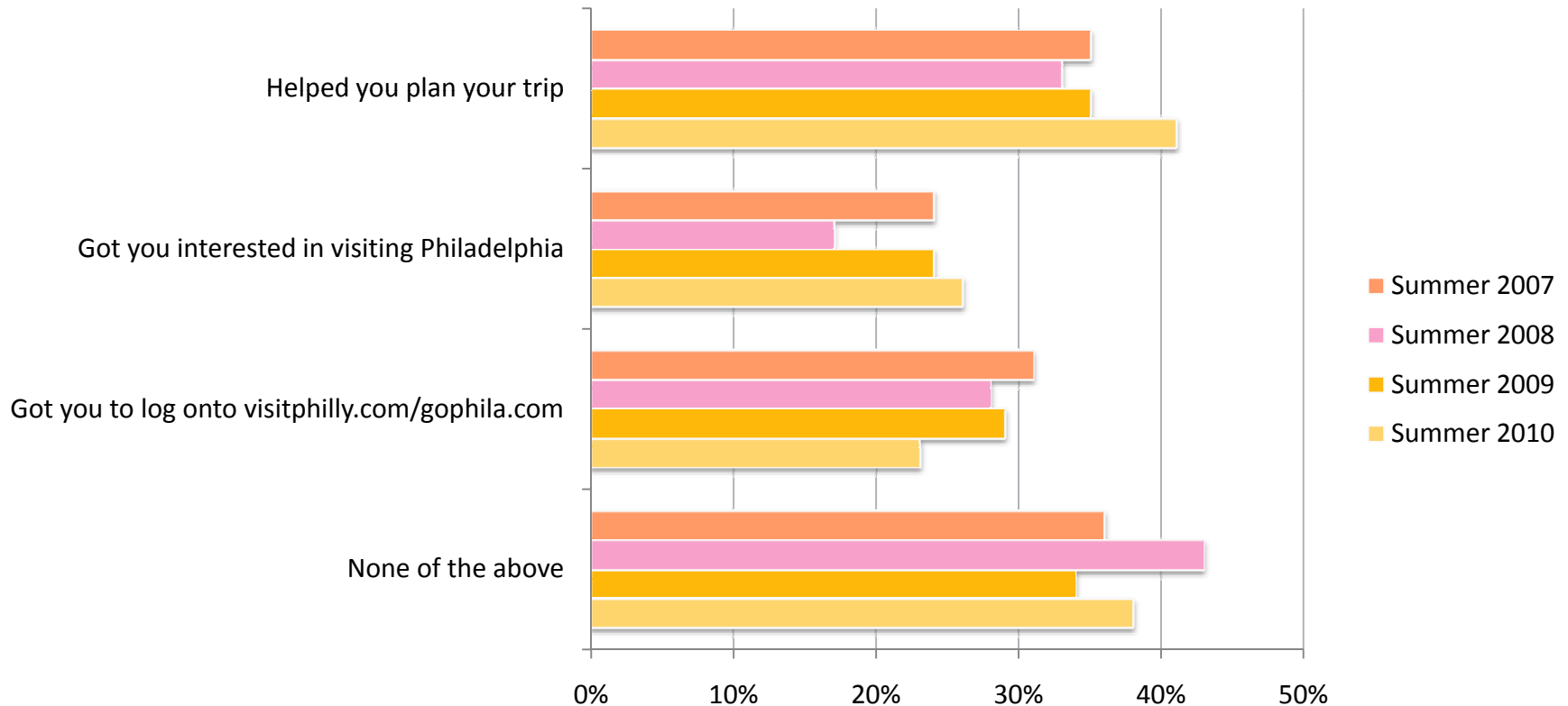
- Almost half of respondents were not interested in receiving travel information through any of the channels. Those who were most often would like to get travel information through an e-newsletter or Facebook.



Impact of Articles



- More than half of respondents said they were influenced by articles about Philadelphia each summer.
- Summer 2010 scored the highest on “helped you plan your trip”



Source: visitphilly.com hotel visitor surveys



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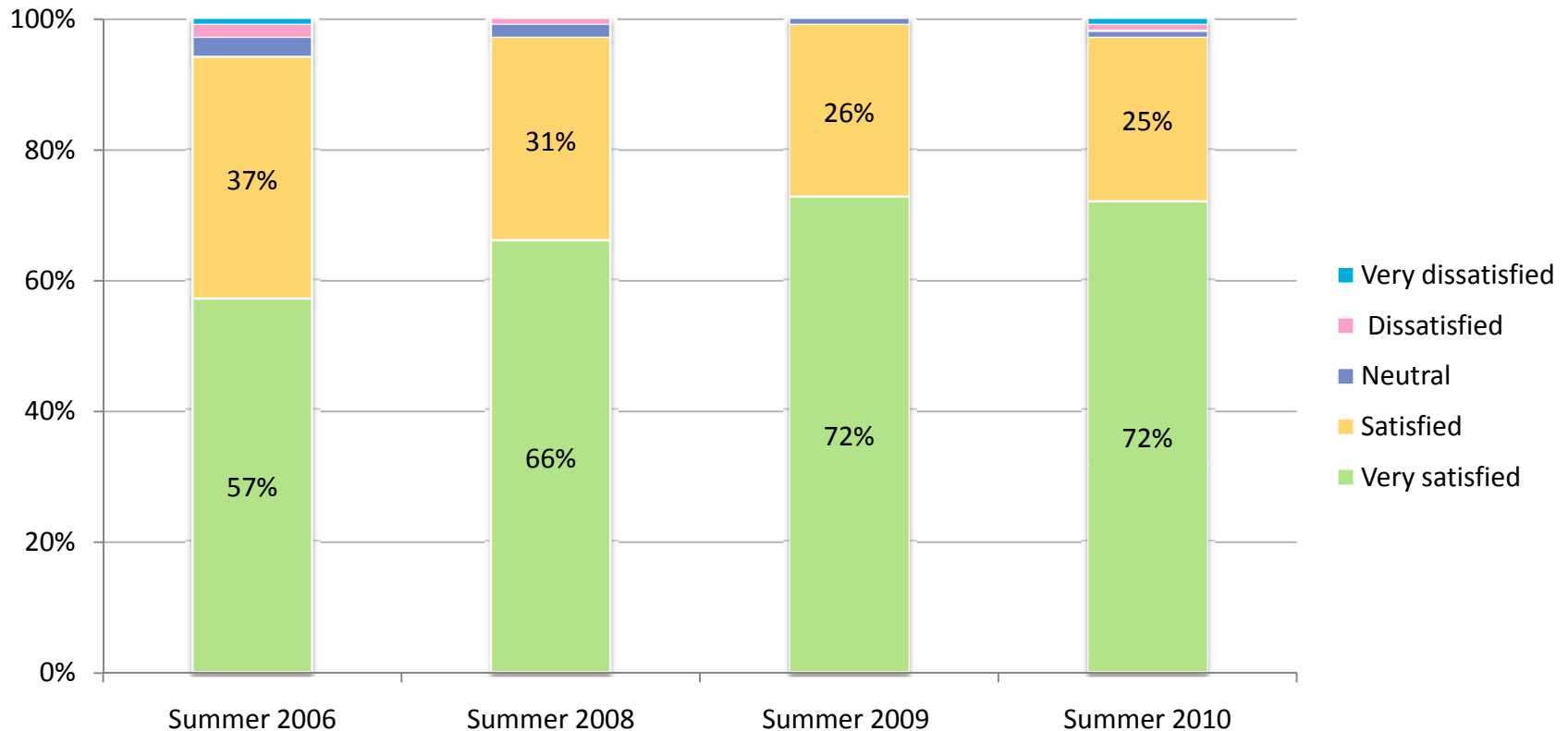
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Visitor Satisfaction

Satisfaction With Philadelphia Trip



- Nearly all respondents were satisfied with their trips to Philadelphia.
- In the past two summers, nearly 75% of visitors were very satisfied with their trips, compared to only about two-thirds in the summer of 2008 and even less in 2006.



Future Plans to Return to Philadelphia



- Over the past four summers, a majority of visitors have said they intend to return in the next year, consistently around 60%.

