



# Baseline Survey Executive Summary

October 8, 2010

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# Methodology

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- Conducted by GPTMC and Branch Associates
  - Respondent panel from E-Rewards
  - Deployed August-September 2010
- Sample: 901 online surveys completed
  - Sample was weighted by gender to compensate for a higher response rate among women
- Survey will be repeated in the future with the same methodology and questions to help gauge the success of the campaign
- Goals
  - Establish perceptions of Philadelphia
  - Compare Philadelphia to other top destinations
  - Explore the Philly 360 brand and website

# Respondents

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- Respondents were screened to make sure they fit the target demographic for the campaign:
  - African/American and biracial/mixed background, age 25-44
  - Overnight leisure trip with paid accommodations in the past two years
  - Expressed interest in: music/arts/culture, local restaurants, bars/clubs, boutique shopping, online travel planning
- Four target markets (MSAs):
  - New York (250 responses), Washington DC (236 responses), Philadelphia (203 responses), Southern (212 responses)
    - Southern Markets: Raleigh/Durham & Charlotte, NC - Richmond & Newport News, VA
- Average respondent demographics were as follows:
  - Annual Household Income: \$81,314
  - Number of People in Household: 2.6
  - Children in household: 44%
  - Married: 38%

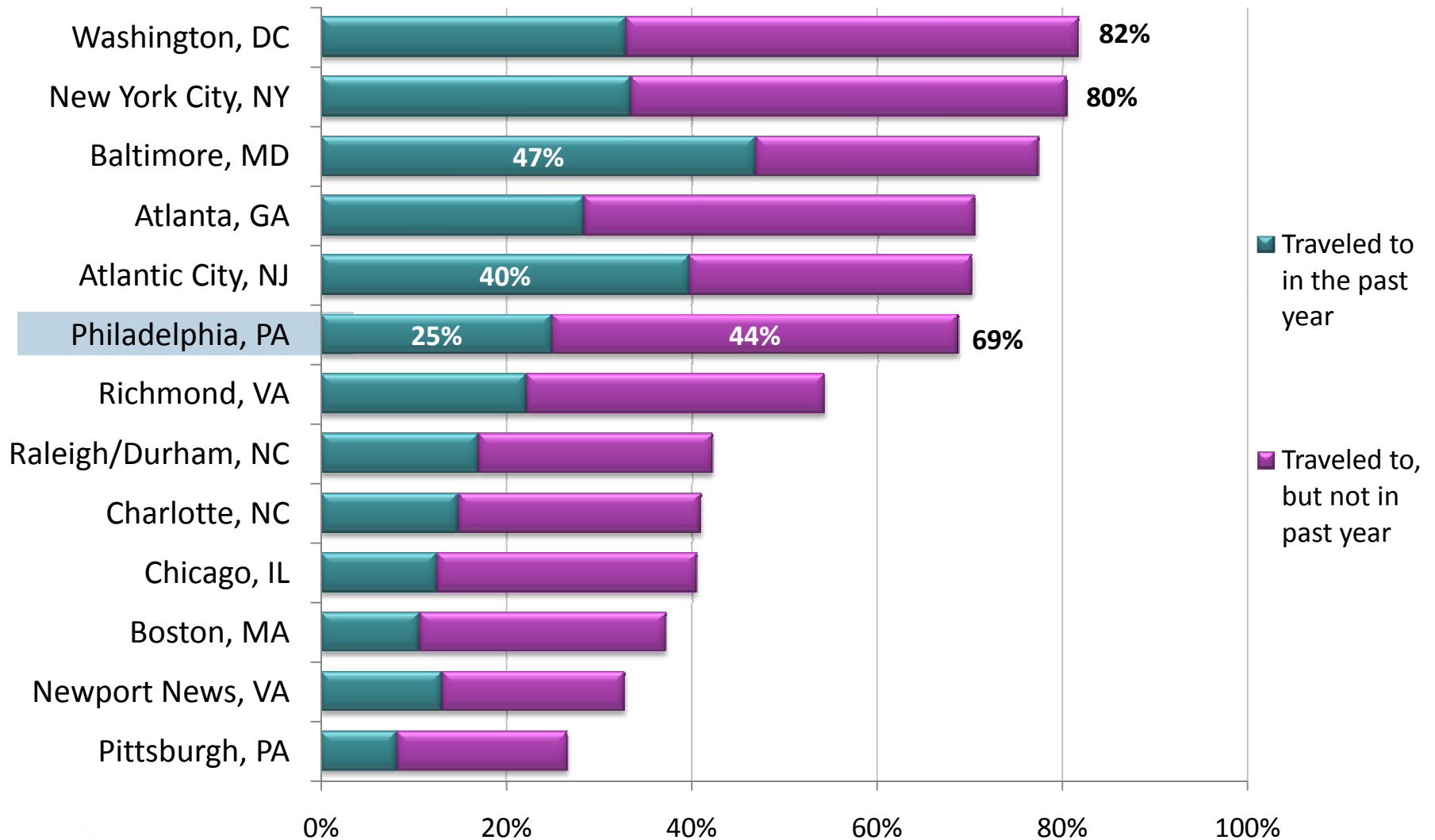
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# Travel Characteristics



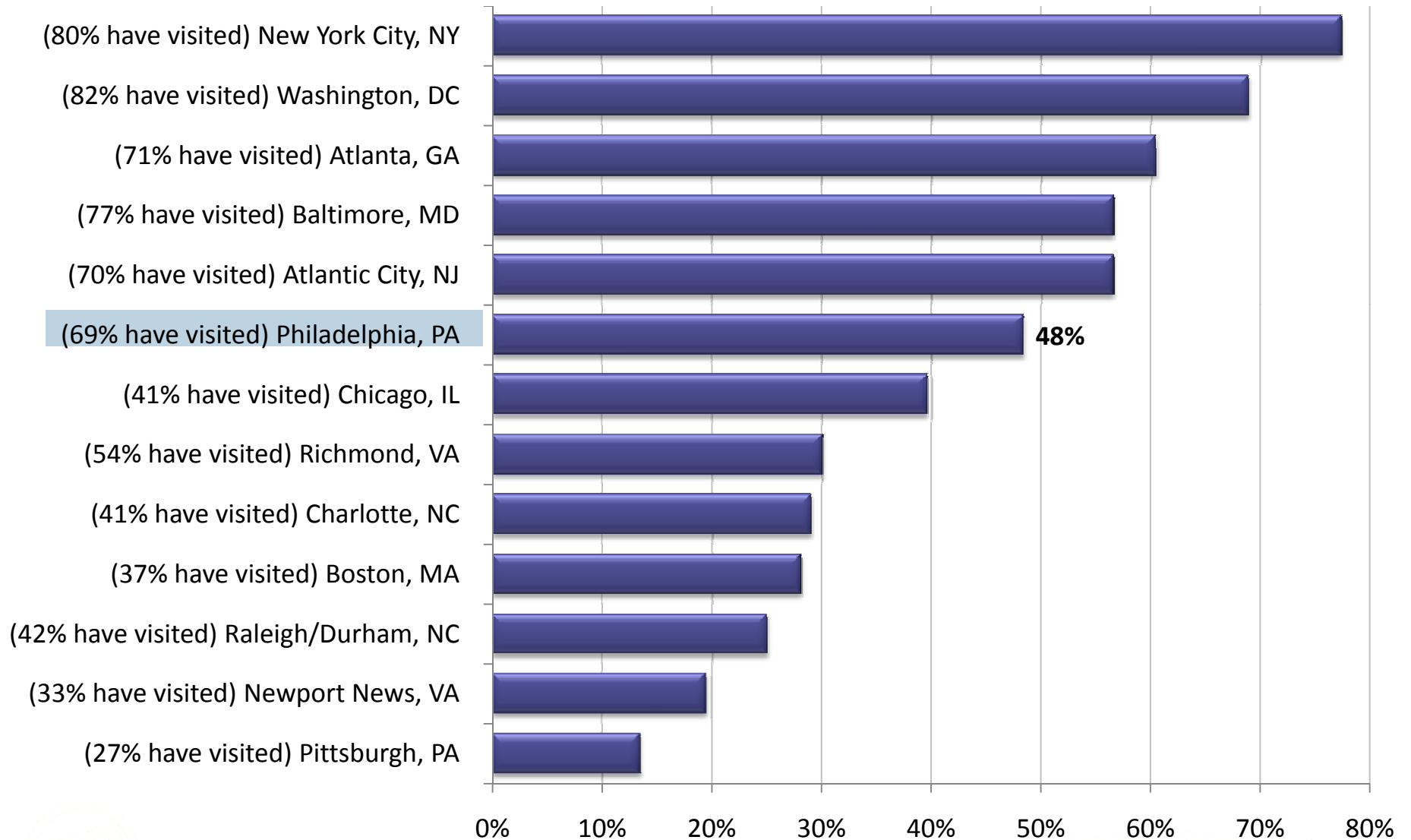
# Travel History by City



Q1: Which, if any, of the following cities have you ever traveled to?

Q2: Which, if any, of the following cities have you traveled to in the past year?

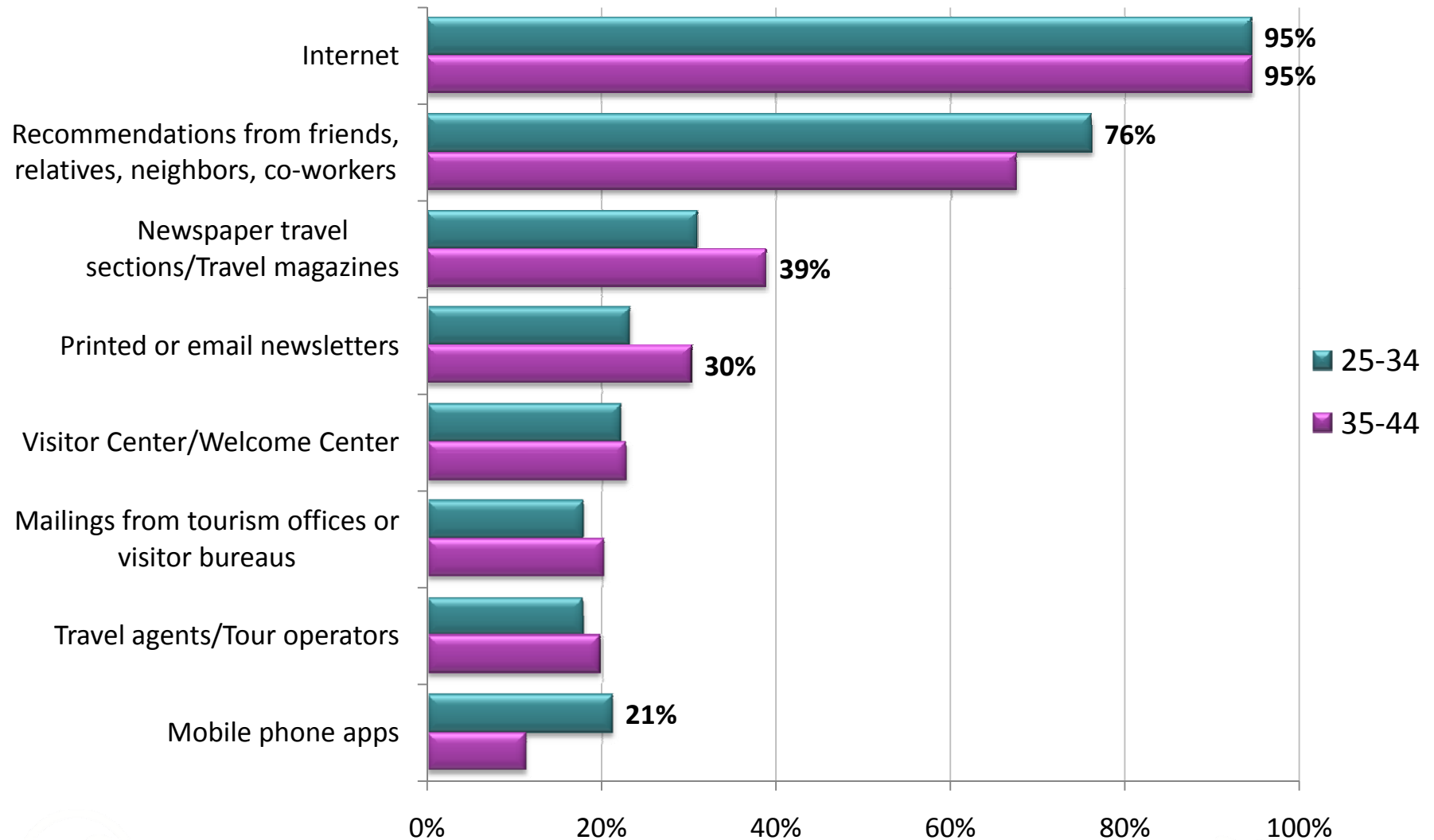
# Intended City Trips (Next Two Years)



Q1: Which, if any, of the following cities have you ever traveled to?

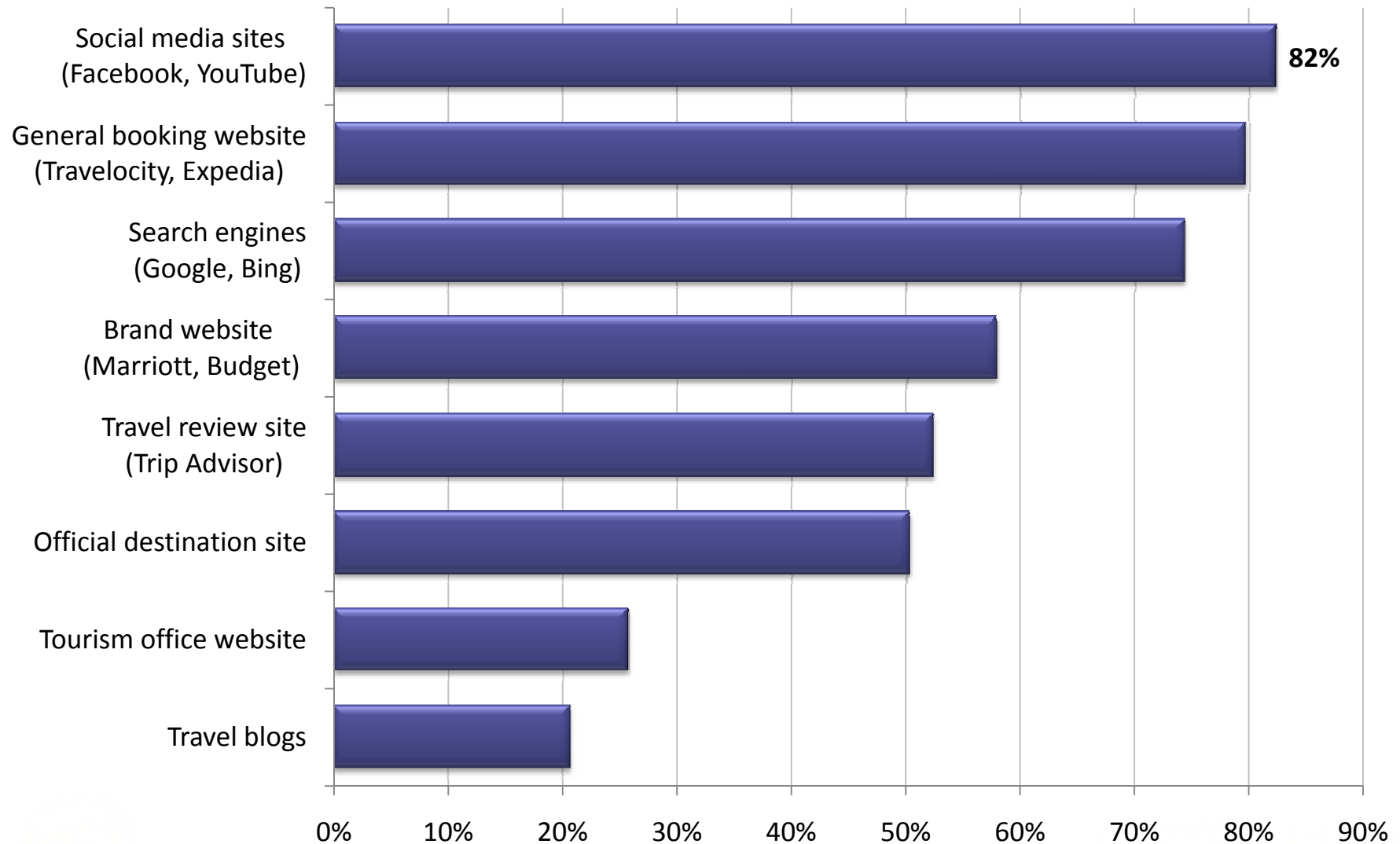
Q3: Which, if any, of the following cities are you likely to travel to in the next 2 years?

# Travel Information Sources



Q6: Which of the following do you use when trying to obtain information on travel?

# Internet Sources Used for Travel Information



Q7: You mentioned that you use the internet for travel information. Please select, from the list below, the types of websites you use for travel information.

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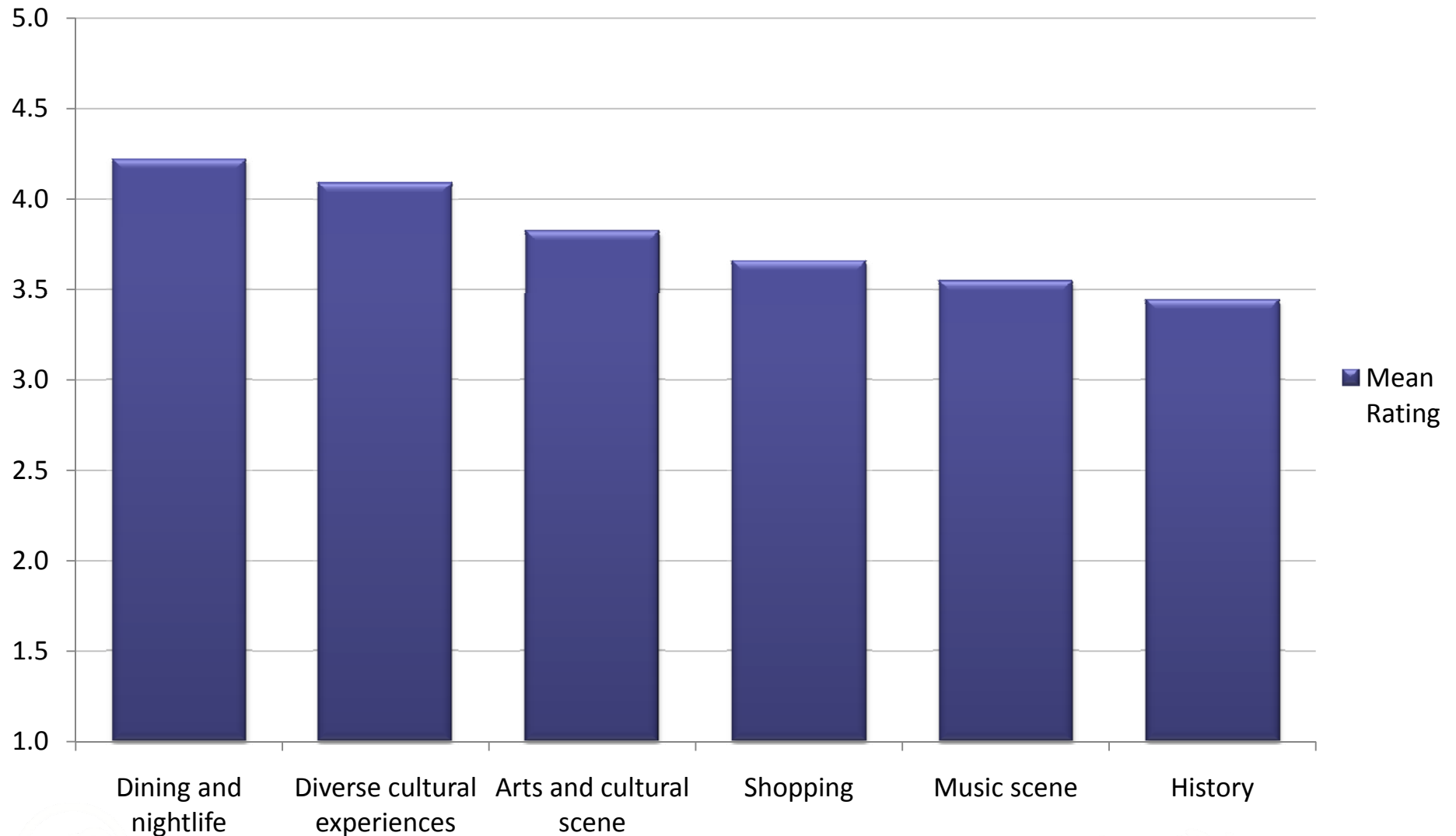
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# City Ratings

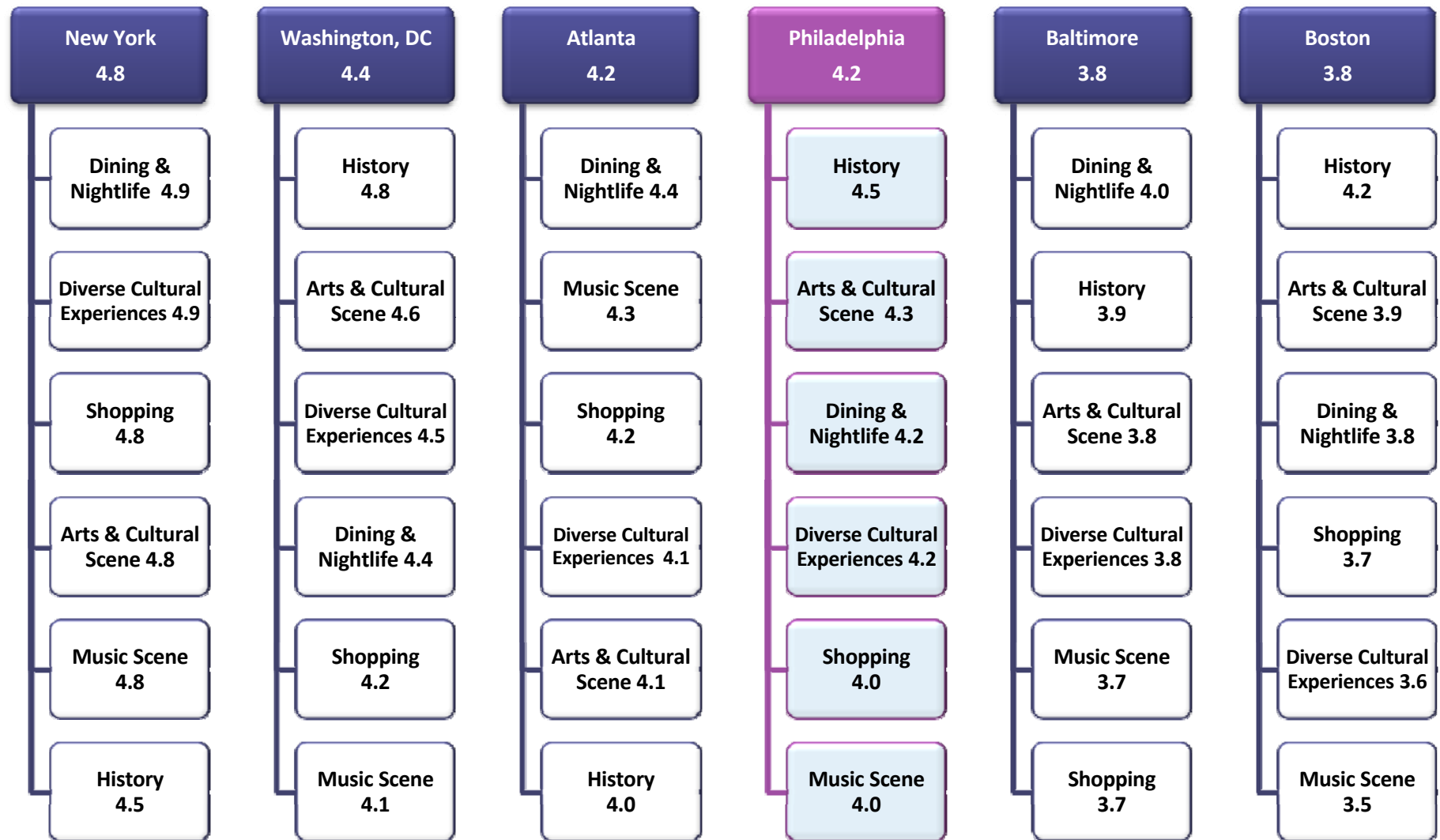


# Factors Important to City Travel



\*A rating of 5 means the factor is “extremely important”, and a rating of 1 means the factor is “not at all important”.  
Q8: When choosing a city to travel to for leisure, how important is each of the following factors to you?

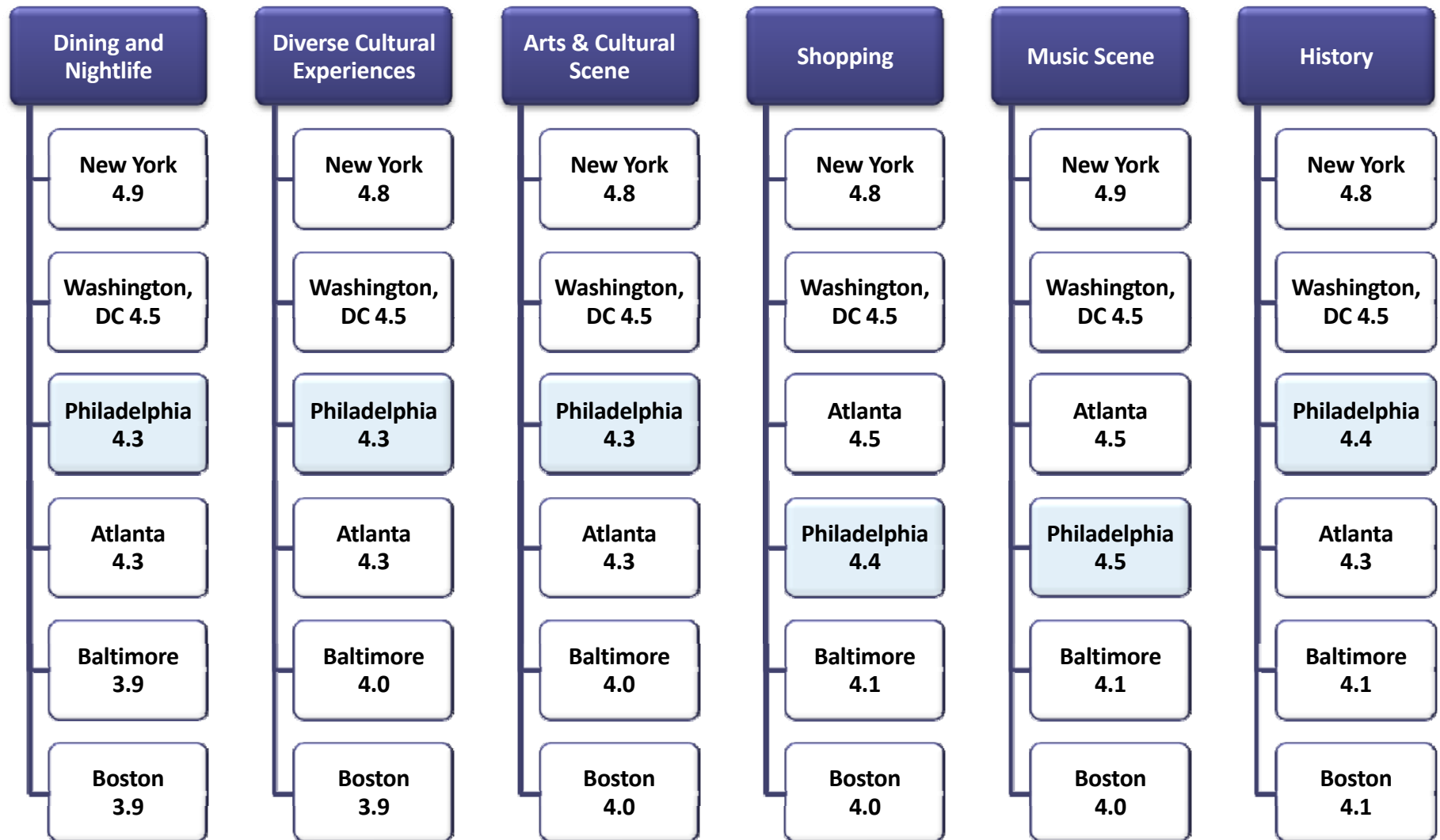
# Ratings by City



\*A rating of 5 means “excellent”, and a rating of 1 means “terrible”.

Q9-14: Please rate [city] on how well it offers each of the following activities/ experiences for you as a traveler, to the best of your knowledge even if you have not visited the city.

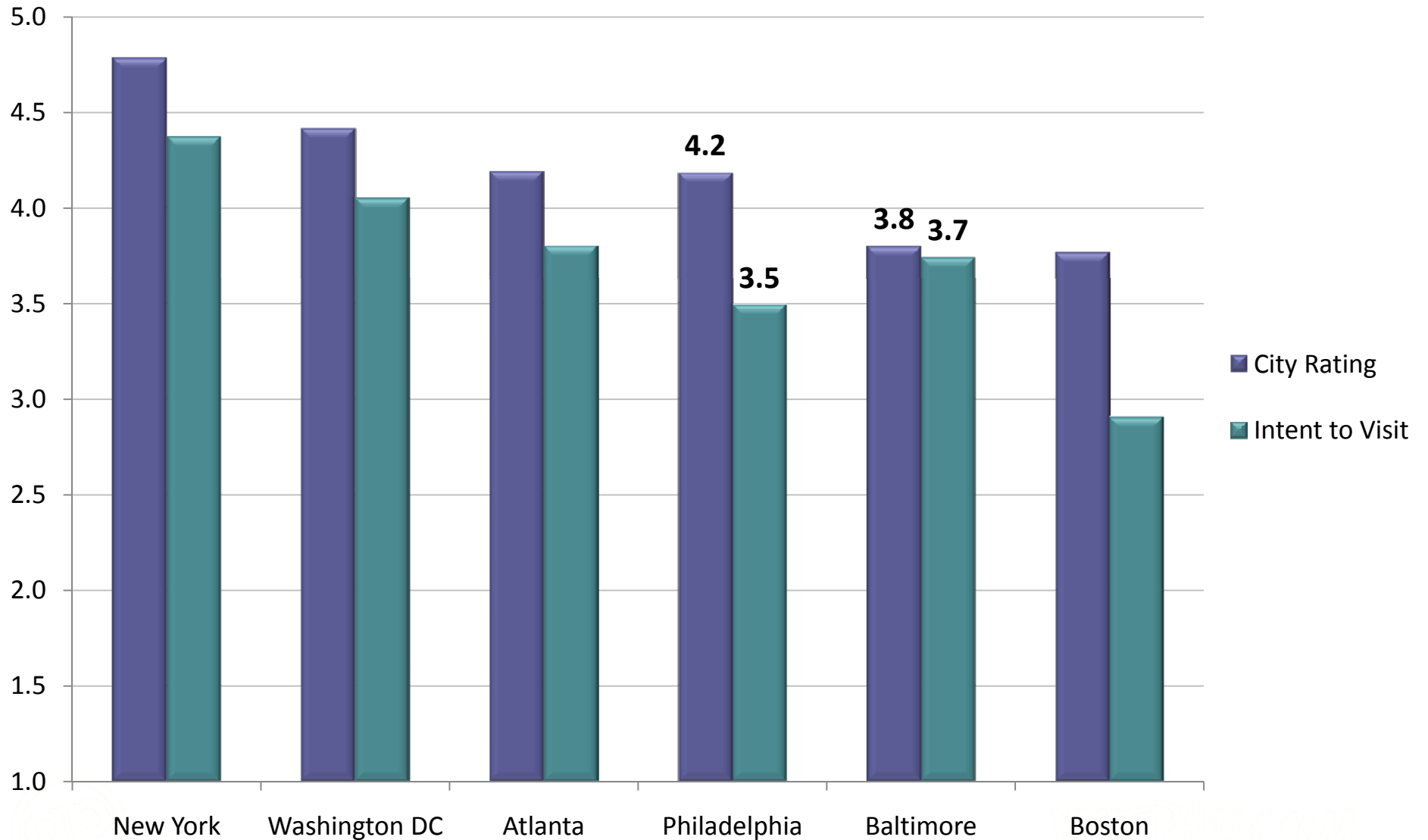
# City Rankings - Among those who Consider Factors “Extremely Important”



\*A rating of 5 means “excellent”, and a rating of 1 means “terrible”.

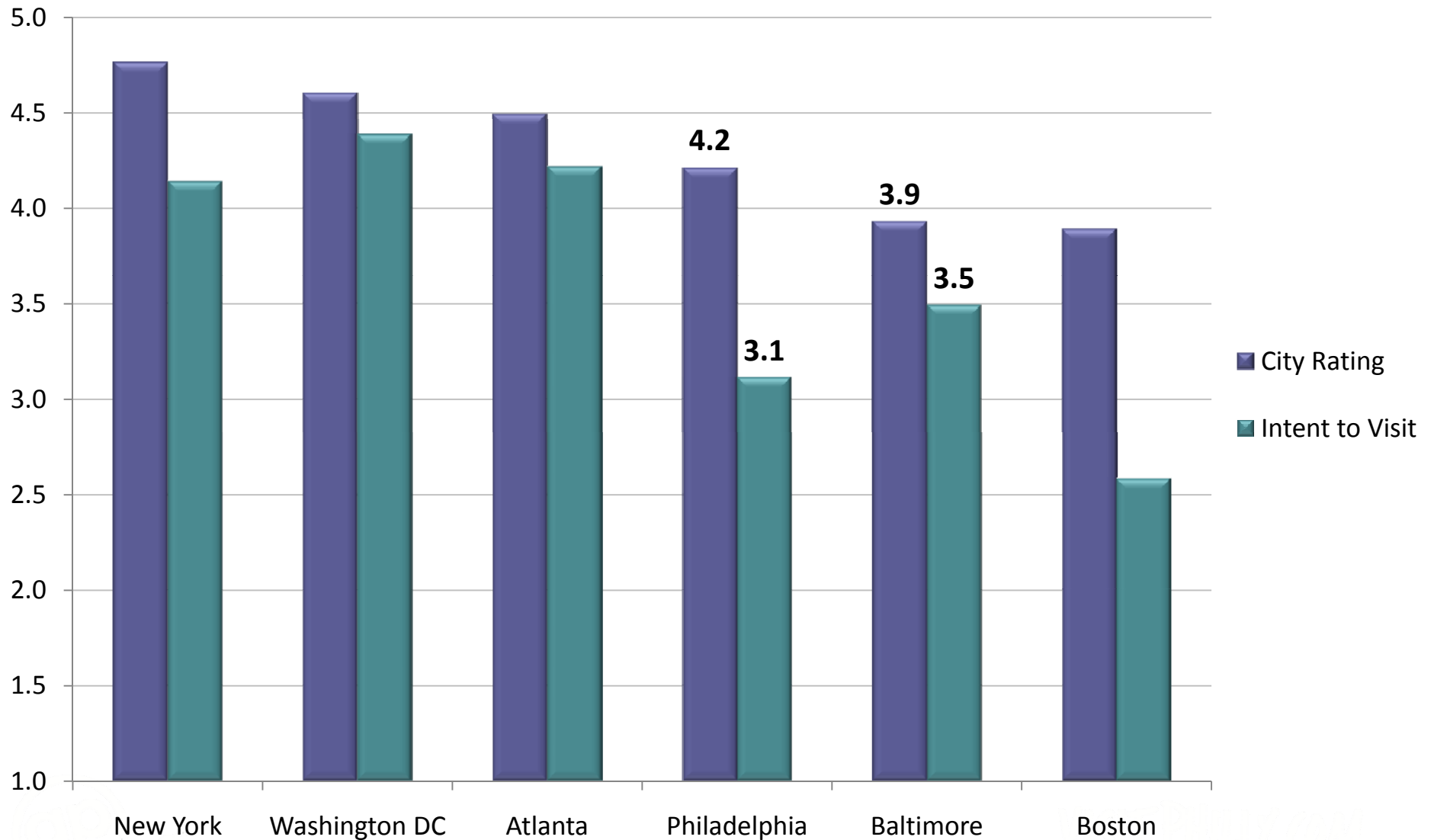
Q9-14: Please rate [city] on how well it offers each of the following activities/ experiences for you as a traveler, to the best of your knowledge even if you have not visited the city.

# City Rating and Intent to Visit



\*A rating of 5 means "excellent", and a rating of 1 means "terrible".

# City Rating and Intent to Visit – Southern Respondents



\*A rating of 5 means “excellent”, and a rating of 1 means “terrible”.

# Characteristics of Philadelphia

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1. History (375)
2. Food/restaurant scene (201)
3. Diverse cultural activities (189)
4. Diverse, multi-cultural, cosmopolitan (141)
5. Fun, exciting (98)
6. Plenty to offer/something for everyone (92)
7. Friendly, welcoming, inviting (87)
8. Entertainment options (84)
9. Eclectic, unique, hip and trendy (63)
10. Urban, fast paced, modern (58)

Q16: What characteristics would you use to describe the City of Philadelphia and its offerings?

# Philadelphia Personified

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*will.smith*

*patti.labelle* *bill.cosby* *jill.scott*

*benjamin.franklin*

*rocky*

*allen.iverson* *eagles*  
*donovan.mcnaab*

1. Benjamin Franklin (230)
2. Rocky (Sylvester Stallone) (107)
3. Will Smith (104)
4. Bill Cosby (45)
5. Allen Iverson (43)
6. Jill Scott (35)
7. Donovan McNabb (30)
8. Eagles (27)
9. Patti LaBelle (26)
10. Other Entertainers (Eve, The Roots, Tom Hanks, Musiq Soulchild, Boyz II Men)

Q17: Who is the first person that comes to mind when you think of the City of Philadelphia?

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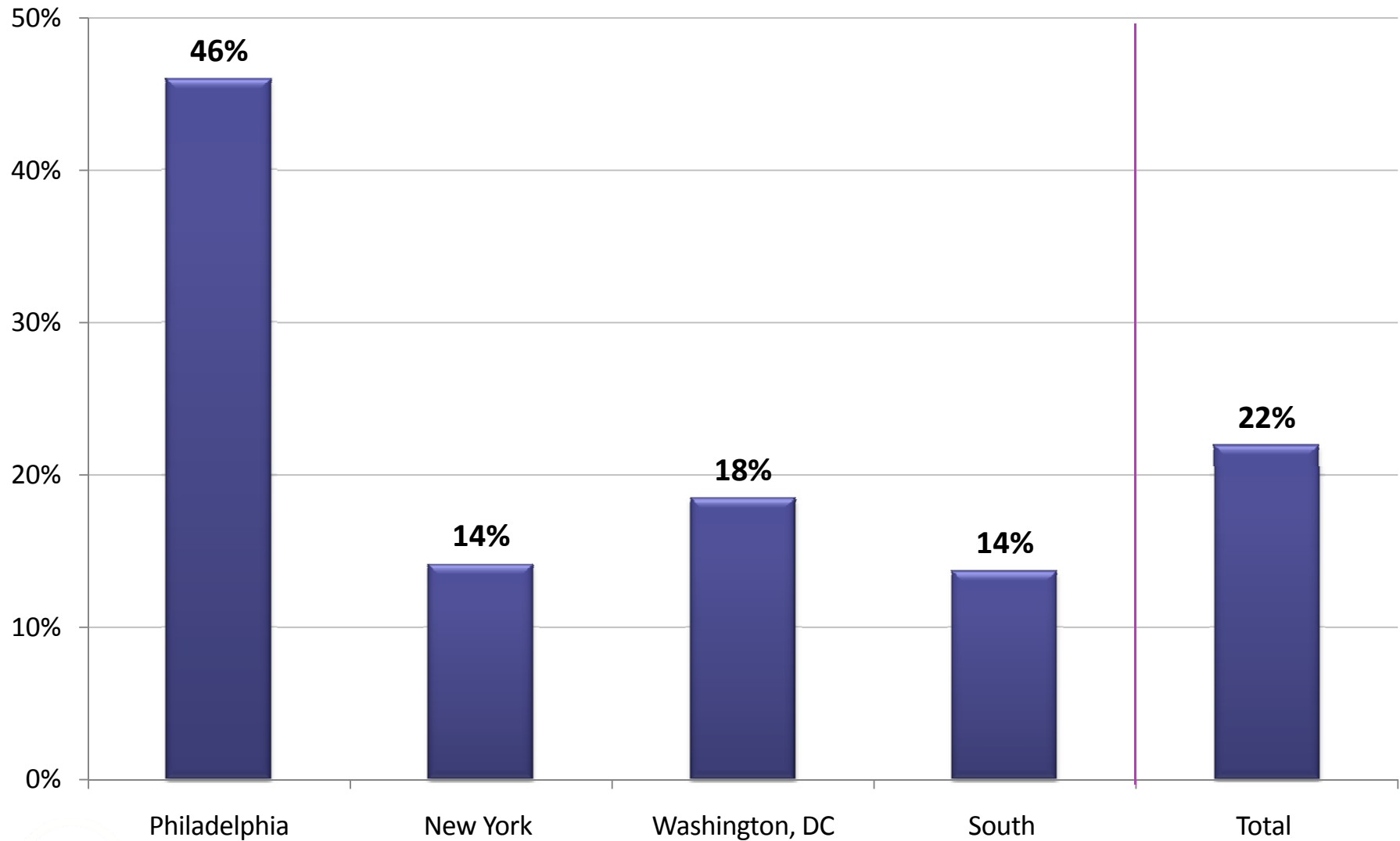
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# Philly 360<sup>°</sup> Campaign Evaluation



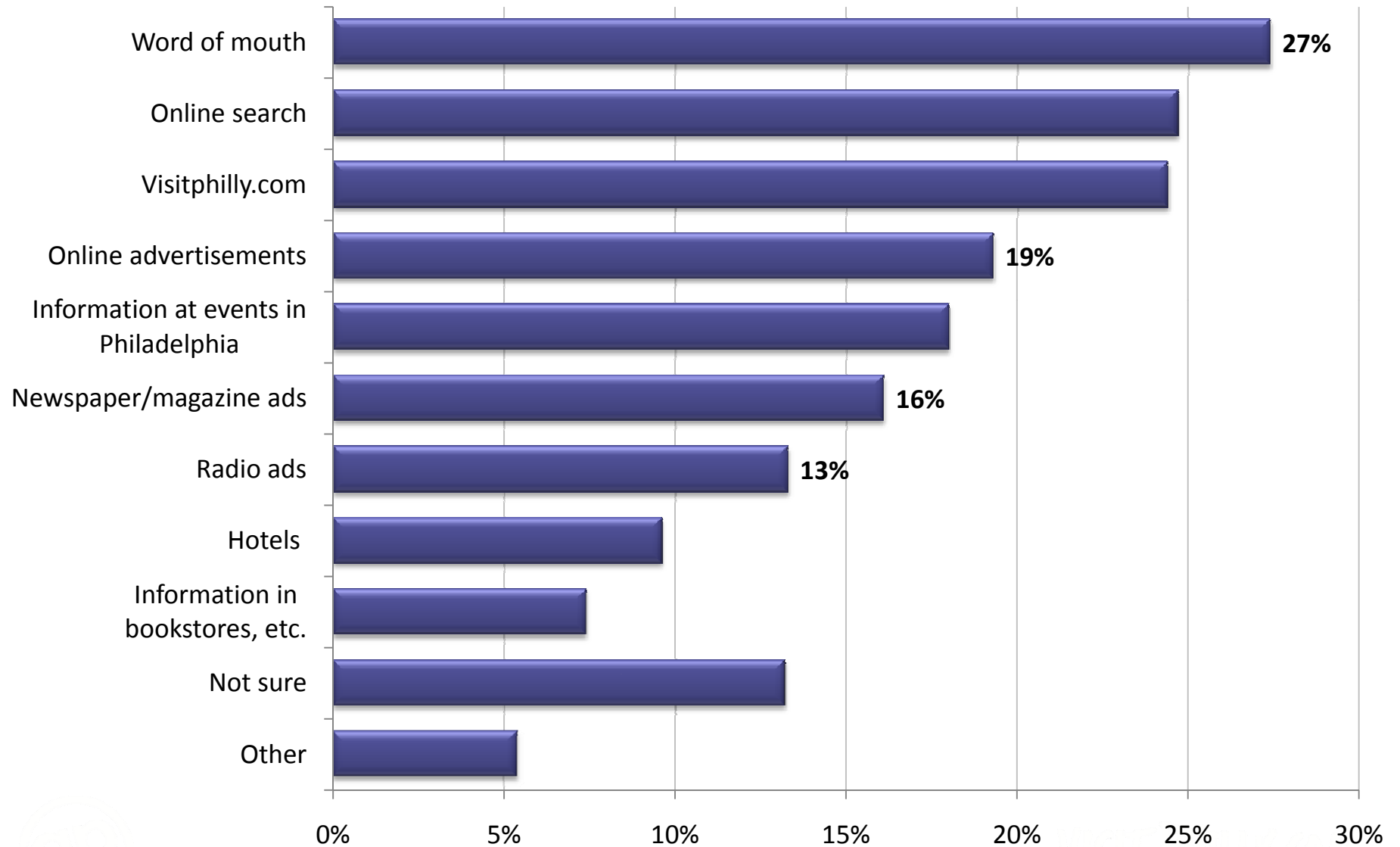
**Philly360<sup>°</sup>**

# Awareness of Philly 360<sup>°</sup>®



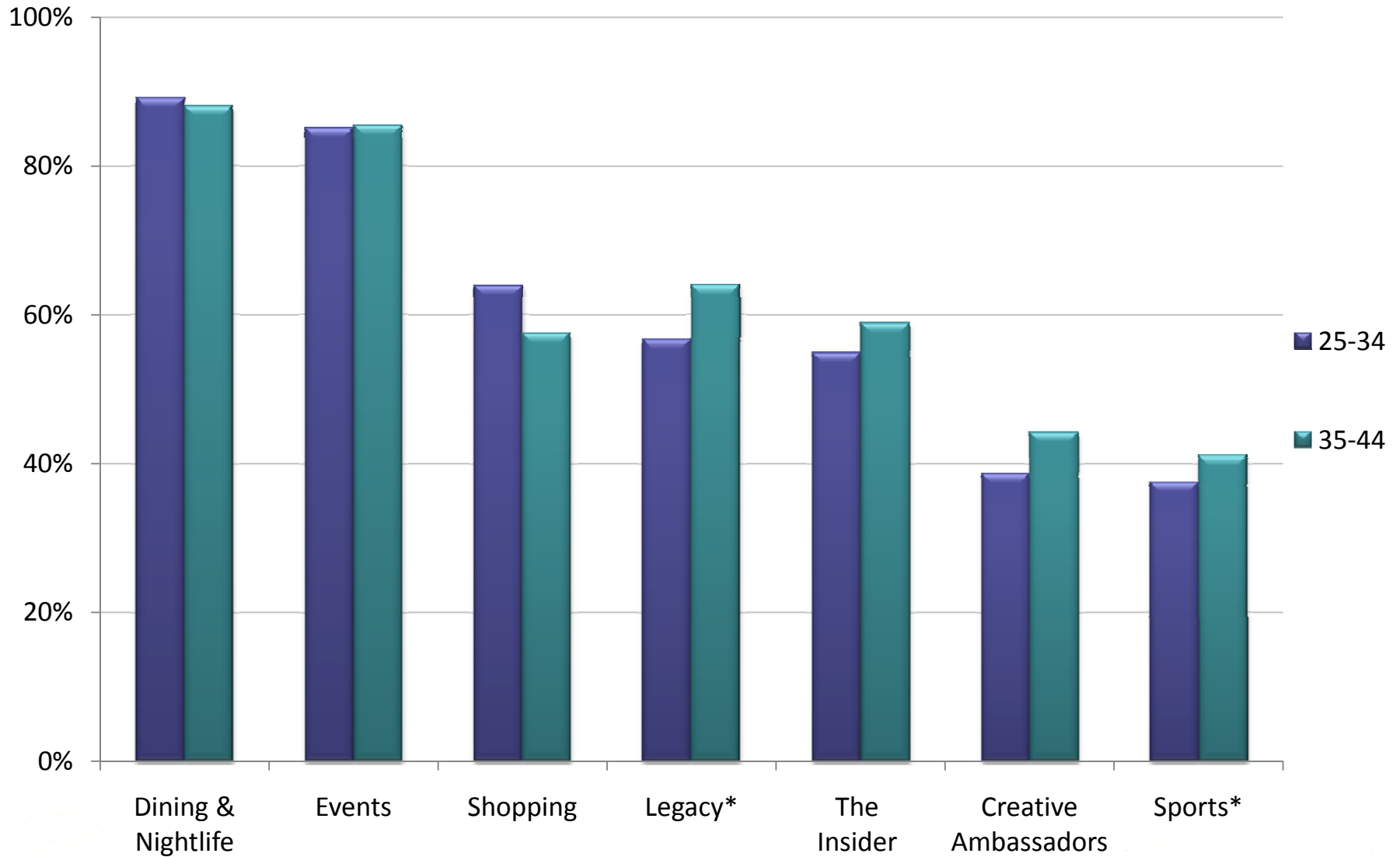
Q18: Have you ever heard of Philly 360<sup>°</sup>?

# How Learned About Philly 360<sup>°</sup>®



Q19: How did you become aware of Philly 360<sup>°</sup>?

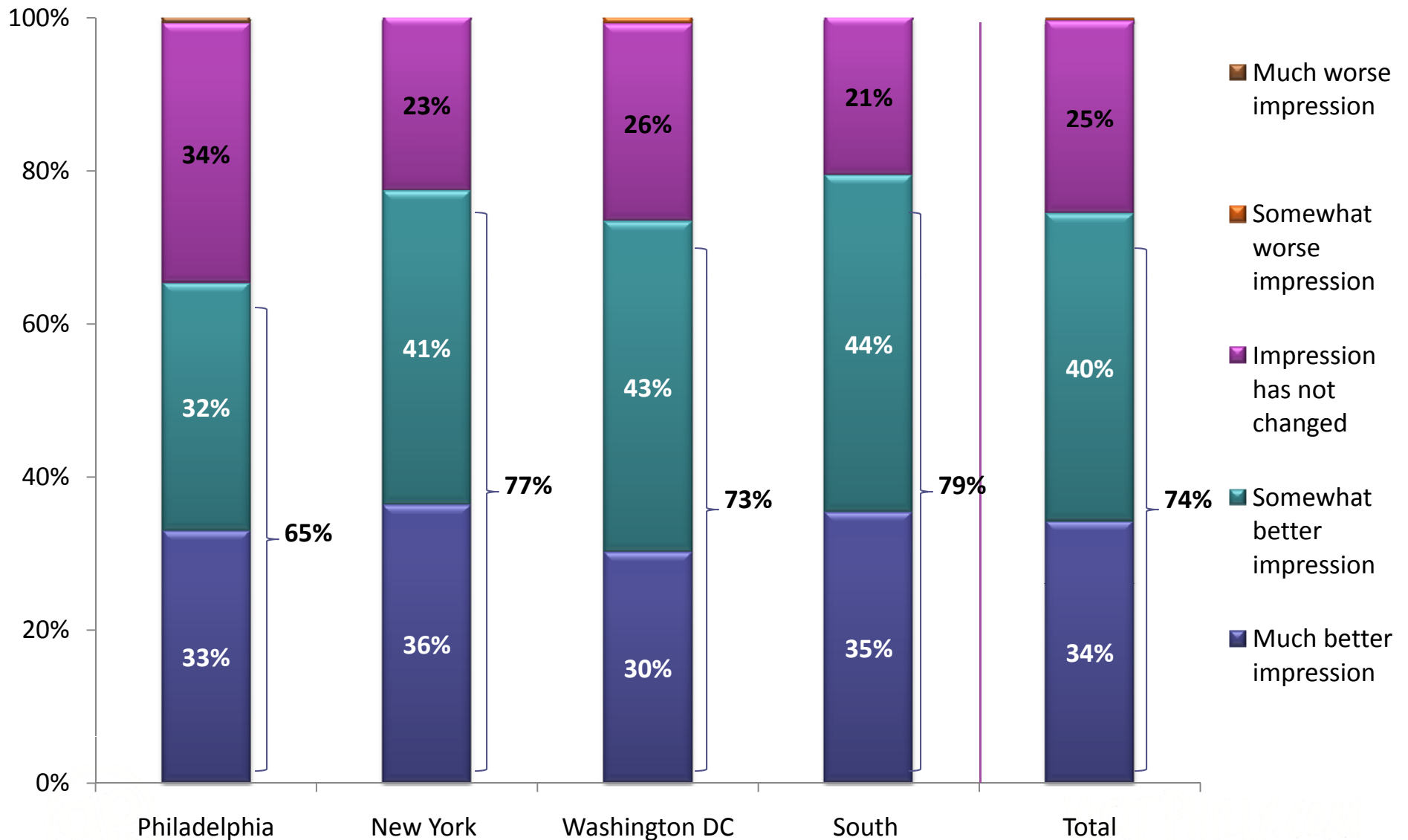
# Philly360.com Sections of Interest



\* Potential new tabs – do not currently exist

Q26: Which of the following topics/tabs would be of interest to you? Please select all that apply.

# Change in Impression Caused by Philly 360<sup>°</sup>

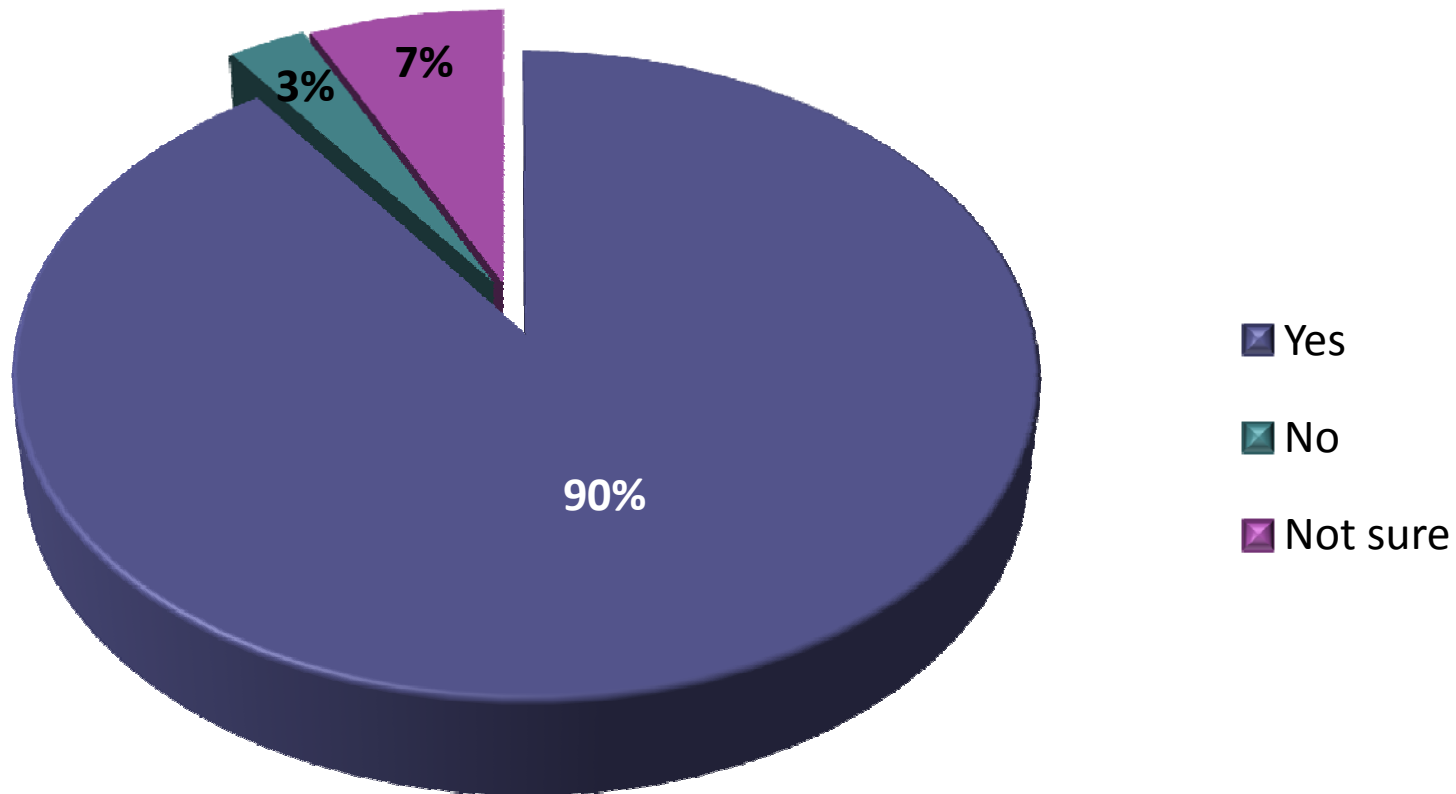


Q27: How, if at all, has your impression of Philadelphia changed as a result of what you have learned about the Philly 360<sup>°</sup> campaign?

# Future Usage of Philly360.com

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- The overwhelming majority of respondents would use Philly 360° to plan a trip to Philadelphia.



Q28: Would you return to this website (philly360.com) to search for information if you were planning a trip to Philadelphia?

# Key Findings

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- Philadelphia's image among the target demographic is strong
  - Among the competitive set, Philadelphia is about even with Atlanta, behind New York and Washington DC and ahead of Baltimore and Boston
  - Despite the strong image, visitation and intent to visit still lags
- The Philly 360 campaign has already established a foothold of awareness in key geographies
  - Awareness of the campaign is particularly high within the Philadelphia market
- The campaign and website are well-received
  - Descriptions and examples of the campaign improve impressions of Philadelphia
  - Respondents are interested in utilizing philly360.com to plan a trip
- History remains the primary association with Philadelphia
  - It is also the highest rated leisure attribute of the city