

GPTMC's TOURISM INDUSTRY PROFILE 2010:

WORTH THE TRIP

There are more than enough reasons to make a trip to Greater Philadelphia, and GPTMC's role is to make sure people know what they are.



Greater Philadelphia Tourism Marketing Corporation



DEAR PHILLY FAN,

THANKS FOR YOUR HELP IN GETTING 30 MILLION VISITORS TO COME SEE ME IN 2008! I'M FLATTERED.

BACK IN THE DAY, PEOPLE THOUGHT THEY COULD GET THEIR PHILLY FILL IN A COUPLE OF HOURS. THEN THEY LEARNED TO MAKE IT A NIGHT, AND NOW THEY REALIZE THAT EVEN A WHOLE WEEKEND WON'T DO. THERE'S THAT MUCH GOING ON! AT FIRST, THEY COME FOR MY CLASSIC ATTRACTIONS (LIBERTY BELL, ROCKY STEPS, PAT'S/GENO'S, YOU KNOW THE DRILL), BUT THEY RETURN AGAIN AND AGAIN TO DO THE THINGS THAT LOCALS LOVE — EAT AT A BYOB, WATCH THE PHILS SLUG IT OUT AT CITIZENS BANK PARK AND OGLE MY THOUSANDS OF LARGER-THAN-LIFE MURALS. EVEN IN THESE NOT-SO-ROSY ECONOMIC TIMES, THINGS HERE ARE MOVING FORWARD. I HAVE NEW HOTELS OPENING, NEW ATTRACTIONS ON THE WAY AND MORE VISITORS WANTING TO KNOW WHAT ALL THE BUZZ IS ABOUT. 30 MILLION PEOPLE CAN'T BE WRONG:
I'M WORTH THE TRIP.

P.S. HEY TRIP PLANNERS: YOU HAVE YOUR TICKETS, YOUR CAMERA AND YOUR PJs. WHAT ELSE DO YOU NEED TO PACK? READ ON...



Who We Are

The Greater Philadelphia Tourism Marketing Corporation (GPTMC) boosts the region's economy by encouraging people to visit and sleep over in Greater Philadelphia. We are the official tourism marketing organization for Bucks, Chester, Delaware, Montgomery and Philadelphia counties. Since 1997, we have reached millions of travelers with consistent, positive messages about all the reasons to visit the Philadelphia region.





TOP 10 Reasons Visitors Choose To Make The TRIP





Top 10 Reasons Visitors Choose To Make The Trip



Why do visitors fall in love with Philly?

Is it the city's style, cultural happenings or restaurants, or is it Philadelphia's sheer authenticity? Survey says: It's everything. It's that feeling of so much to do. Visitors choose to sleep over to experience it all.



Culture, Anyone?

Whether you're into Paul Cézanne at the Philadelphia Museum of Art or up-and-coming bands at Johnny Brenda's, Philadelphia has more culture brewing than ever before. Center City alone boasts 355 arts and culture organizations (up 43% since 1996*), and visitors get their art fix everywhere, from the Kimmel Center to Old City's *First Friday* gallery crawl—and about 350 places in between.



Wine and Dine

Philadelphia is a food lover's kind of town. More than 200 outdoor cafes line the city's sidewalks (up 212% from 2001*), and iron chefs and top chefs alike have made Philadelphia the thriving *foodopolis* it is today. From haute cuisine to street food, there's a meal for every palate and wallet. And with *Philly Beer Week*, regional winery trails and a happening bar scene, visitors have discovered that Philadelphia is best enjoyed with a fork and a corkscrew.



Only in Philadelphia

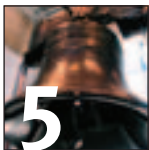
Events and festivals are a big reason people choose to travel. They come for the *Mummers Parade*, *Philadelphia Fashion Week*, the *West Oak Lane Jazz and Arts Festival*, the always fun(gus) *Mushroom Festival* or for one of the many other experiences that only Philadelphia offers—like celebrating America's birthday in America's birthplace.



Style Central

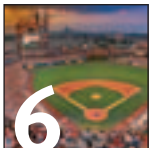
How in vogue is Philadelphia? Très. Thanks to independent boutiques and the larger-than-life King of Prussia Mall, our region's stylish side has never looked better. But it's not only fashion. Philadelphia is emerging as a destination for all things design. With the annual *DesignPhiladelphia*, 2010's *Philagrafika* and numerous artists' studios at The Piazza at Schmidts, Philly's creative side is booming—and that suits us just fine.

*Source: Center City District



The Tried and True

People will always want to stand where our nation was founded, run up the Art Museum steps and engage in the Pat’s vs. Geno’s debate. These experiences will never go out of style for visitors—or for residents. But even though these celebrated spots have been wowing crowds for years, it doesn’t mean they’re not modernizing their visitor experiences. In recent years, the Liberty Bell Center and Please Touch Museum® moved to beautiful new buildings in order to do just that.



Phanatical Philly

Known for our passionate fans and a particularly *phantastic* giant green mascot, Philadelphia is one of the country’s most vibrant sports towns. How does Philly keep us cheering? It’s a winning formula of eight professional sports teams, new and iconic arenas (Spectrum, we’ll miss you!) and longstanding traditions like the *Army-Navy Game* and *The Penn Relays*.



The Great Outdoors

William Penn’s “greene countrie towne” is thriving. Fairmount Park, the country’s largest urban park (yes, bigger than Central Park), creates a network of green retreats across the city. The 23-mile Schuylkill River Trail connects Center City to Valley Forge and gives visitors and residents a chance to enjoy life along the water. Hikers, bikers and boaters find even more to love in Philadelphia’s scenic countryside.



Get a Room

Mini-shampoo collectors, you’re gonna like it here! **Philly’s More Fun When You Sleep Over®** (pajama man, pink slippers, free hotel parking) was the most successful post-9/11 recovery campaign in the country, so we’ve been through tough times before. Today, our AAA Five Diamond Award® winners, big crowd-pleasers, elegant retreats, bed & breakfasts, small boutique hotels, family-friendly lodgings and LEED-certified hotels fluff pillows for all the heads in our beds.



Keep on Moving

It’s true what they say: Philadelphia is a city of neighborhoods, and a highly walkable one at that. But the on-wheels types can get around town even more quickly on Segway scooters, purple trolleys, double-decker buses or even aquatic automobiles. (Don’t worry, we have plenty of interactive walking tours too!) And Philadelphia is accessible by air, train, bus and—since we are within a five-hour drive of a quarter of the country’s population—the good ol’ automobile.



The Real Deal

Experiencing Philly like a local comes pretty naturally. Why? Well, Philadelphia just oozes authenticity. It’s the parks, the trees, the small streets, the owner-operated boutiques, the window boxes, the bike racks, the walkability, the friendliness and even the “atty-tood.” While wandering its neighborhoods and main streets, visitors get the sense that **Philadelphia is really a collection of small towns in a big city—it’s what makes Philly Philly.**

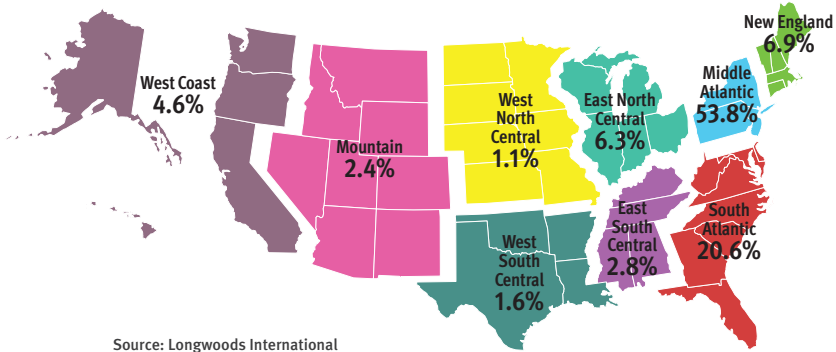


Who Makes The Trip?



30 million total visitors came to Greater Philadelphia in 2008. **29 million** were domestic travelers, up from 21.5 million in 1997 when GPTMC began advertising. They came from all 50 states, and **72%** of them drove here. Vroom vroom.

Domestic Overnight Visitors to Greater Philadelphia by Region, 2008



Source: Longwoods International

Why are these people coming to our region?

80% of them came for fun, fun, fun. Oh, and did we mention the fun?

Back in the old days—1997, that is—only 6.54 million people chose to spend the night. Last year, **10.37 million** people slept over. That's 4 million more people.

Can you say overnight sensation?

Visitation to Greater Philadelphia, 2008

Total Visitation	30.32 million
Domestic Visitation	29.04 million
Overnight leisure	10.37 million
Day leisure	12.97 million
Overnight business	1.85 million
Day business	3.85 million
International Visitation	1.28 million
Overseas	710,000
Canada and Mexico	573,000

Sources: Tourism Economics, Office of Travel and Tourism Industries

WHAT TO PACK: APPETITE

MY RESTAURANTS MAKE THE GRADE. FINE DINING, BRUNCH, GASTROPUB, BYOB AND PIZZA SPOTS TOP TONS OF BEST LISTS. AND EVERYONE'S FAVORITE MEAT-AND-CHEESE COMBO, THE FAMOUS PHILLY CHEESESTEAK, MADE THE FORBESTRAVELER.COM AMERICA'S BEST STREET FOOD RECOMMENDATIONS.

A+!



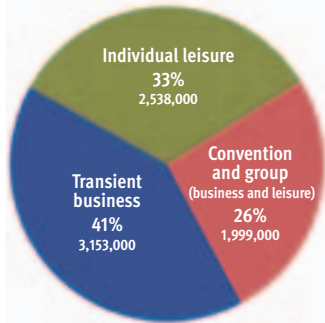
Where Do They Sleep?



Whether they're in town for business, for a convention or simply for fun, not everyone wants to stay on a pull-out couch.

Greater Philadelphia Hotel Market Mix, 2008

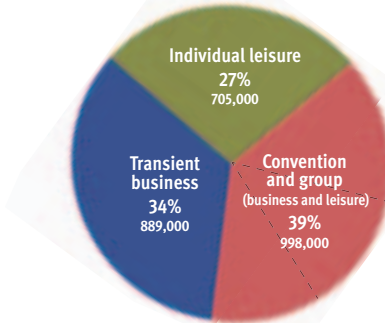
Total Occupied Rooms: 7.69 million



Source: PKF Consulting

Center City Hotel Market Mix, 2008

Total Occupied Rooms: 2.59 million



Source: PKF Consulting

Convention and Group Breakdown

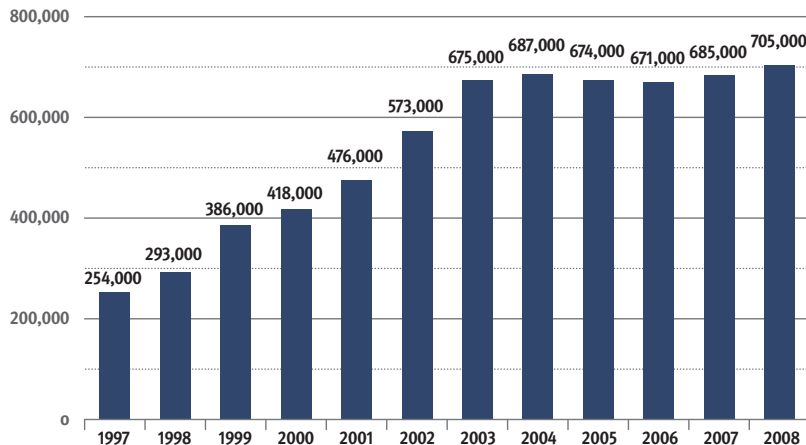
Group business: Non-Convention Center	15%	400,000
Convention Center-related	12%	313,000
Group leisure	11%	285,000

Each year, more and more people choose to make Philadelphia the destination for their vacations, their getaways or their special events. To fully *carpe noctem* (or even a week of *noctems*), visitors are increasingly choosing to stay at one of our region's hotels.

For five years running, Saturday night has been the busiest night of the week

for Center City hotels. An average of **80%** of Center City's hotel rooms are occupied because Saturday night is the perfect time to grab a bite, see a concert or go to a game. Since 1997, the number of individual leisure room nights has nearly tripled—from 254,000 to **705,000**.

Individual Leisure Hotel Room Nights in Center City, 1997-2008



Source: PKF Consulting

Philly's always been home to great visitor attractions.

The Liberty Bell, Independence Hall, Valley Forge National Historical Park, Longwood Gardens, the Philadelphia Zoo, The Franklin Institute and the Philadelphia Museum of Art are all heavy-hitters in the tourism world. But as the region's arts and entertainment scene has expanded over the years, we at GPTMC have worked hard to change people's perception of the city from a **do-it-in-a-few-hours** destination to a **can't-do-it-in-a-weekend** kind of town. And it's working! In 2008, with a dozen years of marketing might behind us, we welcomed 30 million visitors to our great region.

How do you get them to make the trip? People say, if you build it, they will come. In reality, you don't just have to build it. You have to **tell them** about it and **sell them** on it and then, and only then, will **they come**. GPTMC and our marketing partners work together to build the region's brand, image and customer loyalty and make it easy for visitors to plan and book their trips. It's that winning combination of new attractions, new energy and the good work of many organizations telling new stories that has brought us so far.

The game board graphic inside illustrates the road the region has traveled to reach this tourism milestone. And remember, in the game of tourism, it's not about who finishes first. It's about building momentum—steadily and surely.

To see the full Tourism Timeline, visit gophila.com/research.

The Road to 30 Million



on Visitors...



Comcast Center

Please Touch Museum® moves to new location in Fairmount Park.

30 million visitors in 2008—and growing!

2009

The African American Museum in Philadelphia unveils *Audacious Freedom*.

McNeil Avian Center at the Philadelphia Zoo



The Piazza at Schmidts

With Love, Philadelphia, XOXO™ debuts.

Everybody wins! And the Philadelphia region continues to grow...

Visitors know there's too much to do in Greater Philadelphia, so they stay longer and come more often.

and Beyond!

2004



Schuykill River Park Trail connects Center City and Valley Forge.




Liberty Bell Center



Lincoln Financial Field




National Constitution Center




Ride The Ducks and Big Bus Tours

2003




New international terminal at Philadelphia International Airport

2000



National Liberty Museum

2001



Republican National Convention

More beds for more heads! 4,000 more hotel rooms in Center City



Independence Visitor Center




Kimmel Center for the Performing Arts

2002

Philly Overnight® Hotel Package helps the region's tourism industry after 9/11.

Cruises begin to set sail.



You pronounce "Schuylkill" correctly. Get ready for the regatta!

Successfully Whiz your peak!

While we're thrilled to have welcomed 30 million visitors in 2008, our work is far from finished.

Now's the time to keep the momentum going by encouraging more and more visitors to come over and over again. Here are some of the reasons they'll be making return trips in 2010 and beyond:

- *Cleopatra: The Search for the Last Queen of Egypt*, The Franklin Institute (2010)
- *Picasso and the Avant-Garde in Paris*, Philadelphia Museum of Art (2010)
- Chester Stadium (2010)
- *Philagrafika 2010: The Graphic Unconscious* (2010)
- *Ancient Rome & America*, National Constitution Center (2010)
- *Late Renoir*, Philadelphia Museum of Art (2010)
- President's House Commemorative Site (2010)
- Revamped Lights of Liberty Show (2010)
- Renovated Atwater Kent Museum of Philadelphia History (2010)
- New home for National Museum of American Jewish History (2010)
- Le Méridien Philadelphia (2010)
- *Creatures of Habitat*, Philadelphia Zoo (2010)
- *Making Scents: The Art and Passion of Fragrance*, Longwood Gardens (2010)
- SugarHouse Casino (interim casino, 2010; permanent building, 2013)
- Expanded Pennsylvania Convention Center (2011)
- *Philadelphia International Festival of the Arts* (2011)
- Renovated and expanded Mercer Museum (2011)
- New home for The Barnes Foundation (2012)
- Renovated Franklin Court Museum (2012)
- The Museum of the American Revolution (TBD)



How Do We Get Them Here?



It Takes a Village

The 30 million people who experienced Greater Philadelphia last year came for fun, but they also came for business and conventions. GPTMC works daily with hospitality partners in Bucks, Chester, Delaware, Montgomery and Philadelphia counties, as well as the Independence Visitor Center, the City of Philadelphia and the Commonwealth of Pennsylvania, to make the region the place 30 million people just had to be in 2008. **Philadelphia and The Countryside®** is a better place to live, work and visit because of all of them.



Visit gophila.com/partners for a list of all our friends in the biz and beyond.

There are more than enough reasons to make a trip to Greater Philadelphia, and GPTMC's role is to make sure people know what they are.

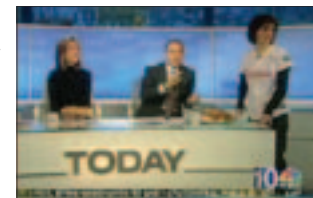
Tourism marketing is not just the ad you see on TV. It's the oh-so-beautiful shot of the skyline you see during an Eagles game, it's the hotel room giveaway contest that has everyone tweeting about Philly and, believe it or not, it's this very report. Read on to see how we use pop culture, advertising, communications, the Web and social media tools to reach visitors and sell them on the Greater Philadelphia experience.

The Power of Pop Culture

People's opinions of a place don't just come from what they read in the travel section of a newspaper or watch on the evening news. People see the many sides of Philly while they're jamming with The Roots on *Late Night with Jimmy Fallon*, watching Matt Lauer eat a Tony Luke's cheesesteak on the *Today* show and cheering on the Fightin' Phils during the World Series. Philadelphia stays top of mind through the television hit *It's Always Sunny in Philadelphia*, movies filmed in our region and friends' comments about the region on Facebook.

For tourism destinations, it's important to be popular.

Philly's been ready for its close-up for some time now. GPTMC takes advantage of Philadelphia being in the national spotlight by working with professional sports leagues, major network and cable TV shows such as *The Colbert Report* and the Greater Philadelphia Film Office to keep Philadelphia out there and looking good.



Today



The Roots



Stephen Colbert

Advertising

Boy, have our marketing efforts grown! In the beginning, our TV commercials ran only in the summer, with the likes of Oprah Winfrey, Bill Cosby and Ken Burns giving consumers the scoop on their Greater Philadelphia faves. Then, a grown man in pajamas told people **Philly's More Fun When You Sleep Over**®. Over the years, we've turned **The Place That Loves You Back**® into the place that invites you with letters signed **With Love, Philadelphia XOXO**™. While the campaigns have changed, the heart of the message remains the same: There's so much to do here, you have to sleep over, tell your friends and come back again!

In 2008, people viewed our advertising **383 million** times (that's a lot!). Each ad—online, on air, on major interstate billboards or in magazines at the doctor's office—gives travelers reasons to visit and sleep over in the region.

Communications

PR. These two little letters have a big impact on our region. In 2008, **5,000** print, TV and online stories showing off our best sides were a result of GPTMC's communications efforts.

How do we do it? For starters, we spend countless hours pitching stories to journalists, both near and far; we write and distribute hundreds of press releases; and we conduct media events in other cities and attend conferences like the Society of American Travel Writers. But the best way to get a good Philly story out there is by giving journalists a firsthand look at our region. And that's exactly what we do week after week so they can experience Philly for themselves.

We also shoot thousands of pretty pictures and hours of high-def b-roll of the region that are featured in Associated Press articles and on national TV, giving us a pretty mighty communications toolbox. And all of our assets are available 24/7 on gophila.com/pressroom.



WHAT TO PACK: PICNIC BASKET

YOU'LL SEE WHY WHEN YOU VISIT MY BREATHTAKING COUNTRYSIDE. BALTIMORE MAGAZINE DECLARED THE BRANDYWINE VALLEY THE **BEST DAY TRIP**, AND NEW HOPE MADE THE FORBESTRAVELER.COM **AMERICA'S PRETTIEST TOWNS** LIST. I'M BLUSHING.



How Do We Get Them Here?



Get Ready to visitphilly.com

In January 2010, **gophila.com** will unveil a new design and a new name: **visitphilly.com**. The redesigned site will market the region with engaging photography and built-in interactive slideshow and video players. The site will be easier to get around and incorporate social media tools to help visitors access the information they want as they plan their trips. The new design is sleek and fun, and it shows off the region like never before.

With the new design comes a new name: **visitphilly.com**. Fear not, loyal friends—**gophila.com**, the Web address that has served us well for 10+ years, will still take you to the new site. But the new **visitphilly.com** address will greatly improve GPTMC's online marketing, delivering a simple, easy-to-remember message that will better position the site when people search for Philadelphia travel information. Simply stated, the new name tells visitors exactly what we want them to do: **Visit Philly!**

Online

So they've seen an ad on TV or read a magazine article about Philadelphia. Now what? The next stops are **gophila.com** and **uwishunu.com**, two sites that enable visitors to imagine, create and book their trips. Want to find out what's happening this weekend? Check. Need an itinerary for an upcoming vacation? Check. Like suggestions for breakfast, lunch and dinner? Check, check and check, please.

gophila.com provides visitors with all the tools (maps, photos, itineraries, videos, descriptions, booking capabilities and more) to plan and book their trips. Visits to the site approached **6 million** in 2008, and when people search for Philadelphia on Google, guess what comes up first?

Traffic to **uwishunu.com** has more than **tripled** over the past year because visitors and residents see it as a great source for fresh and compelling ideas about where to eat, drink and be merry. New and different attractions and deals are always popping up, providing visitors with more reasons to return to the site. **uwishunu?** nowudo!

Social Media

Here's the deal: Social media helps potential visitors click, text, tweet and, most importantly, connect to Greater Philadelphia through the platform of their choosing. It allows them to hear our stories and share theirs. They can read about a store opening on our blog, learn about hotel and restaurant deals from our tweets and reminisce about a recent festival on Facebook.

Back in 2006, blogging was a relatively new sport. These days, it's common to have a blog, along with a Twitter account and a Facebook page. GPTMC adopted and embraced the social media world early on with **uwishunu.com**, and our social media properties have grown with the technology. Recently, Development Counsellors International named us one of the **Tweet Elite**, the top six destinations in the U.S. using Twitter.

Follow visitphilly on:



With Love, Philadelphia XOXO™

How do I love thee? Let me count the ways. With **85 (and counting)** love letters in circulation, the **With Love, Philadelphia XOXO™** campaign has been wooing travelers since May 2009. The series of letters, penned by the city itself, uses a little Philly “atty-tood” to invite visitors to sleep over and have fun while doing it.

The campaign has proven to be a *smasheroo* with visitors and residents alike. When we convened focus groups to get some feedback, participants told us:

- Philadelphia’s personality as portrayed in the ad campaign is highly positive and described as **funny, confident, warm, inviting and friendly**.
- The campaign goes over well with all races and ages thanks to a sense of humor that is accessible to all. Consumers value that the humor is not mean or poking fun at anything but the city itself.
- The television commercial was memorable and effective. Participants focused on the key message that Philadelphia has so much to do that it’s worth staying over, and they were able to recall several of the places and activities highlighted in the spot.

Philly 360™

Philly 360™ tells new stories to a new generation of African-American travelers, with a focus on the people who love Philadelphia and make it special. GPTMC has enlisted musicians, producers, visual artists and designers as creative ambassadors who promote new Philadelphia stories to new audiences in new ways.

The campaign shines a spotlight on major, *unofficial* cultural happenings, including exhibitions, concerts and fashion and design events throughout the year. On gophila.com/philly360, a series of personalized videos from our creative ambassadors showcases their favorite places to eat, shop and hang.



King Britt, Creative Ambassador

WHAT TO PACK: POWDERED WIG

THE HISTORY BUFFS OVER AT TRIPADVISOR® CALLED MY INDEPENDENCE NATIONAL HISTORICAL PARK ONE OF THE COUNTY'S **TOP 10 PATRIOTIC ATTRACTIONS**. I UNDERSTAND — THE BELL BRINGS A TEAR TO MY EYE TOO.



What's It All Worth?

Investing in tourism marketing delivers. The return on investment from tourism marketing is immediate, continuous, significant and measurable for our region.

For every media dollar GPTMC spends marketing the region:

- **\$185** is generated in economic impact (direct, indirect and induced spending).
- **\$13** is generated in local, state and federal taxes.

Source: Econsult

Tourism marketing makes money by bringing in more in taxes than was spent to fund it. So it's not a cost to taxpayers, and it doesn't compete with priority programs like schools and libraries—it helps pay for them.

Economic Impact

Tourism is a vital part of the economy of Greater Philadelphia. Visitors bring new money into the region, money that supports local businesses and enables them to spend more and hire more. Each day, visitor spending generates more than **\$25 million** in economic impact for the region.

In 2008, the Greater Philadelphia tourism industry generated:

- **\$9.3 billion** in economic impact
- **87,384** jobs (5% of all jobs in the region)
- **\$1.35 billion** in federal, state and local taxes

Source: Tourism Economics

WHAT TO PACK: PARTY HAT

PEOPLE COME BACK EVERY YEAR FOR MY BIG EVENTS LIKE BEER WEEK, WELCOME AMERICA! AND THE MUMMERS PARADE. CHECK OUT WHAT MY FANS THINK: MEN'S HEALTH CALLED ME A **TOP FIVE BEER TOWN**; TRAVEL + LEISURE SAID I HAVE SOME OF THE **BEST JULY 4TH FIREWORKS**; AND AUSTRALIA'S THE SYDNEY MORNING HERALD TOLD READERS I'M ONE OF THE **WORLD'S TOP 10 PLACES FOR NEW YEAR'S**.

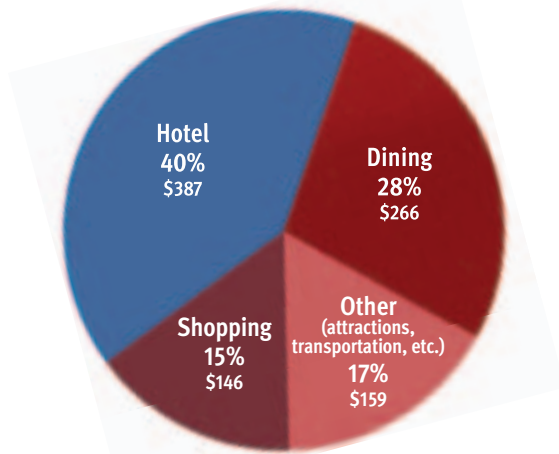


What's It Worth To Residents?

Where do visitors spend money? Everywhere.

The impact of visitor spending extends far beyond the region's hotels. Downtown hotel visitors actually spend more money *outside* of the hotel than they do in it—at restaurants, at shops and even on those little Liberty Bell snow globes. The money visitors spend here stays here, and locals reap the benefits.

Trip Spending for Center City Hotel Visitors
Average Total Spending: \$958



Source: GPTMC surveys of gophila.com hotel bookers, 2006-2009
Sample size = 2,849
Visitor spending is calculated per party per two-night visit.

Benefits for Locals

Nothing in Greater Philadelphia has a “Visitors Only” sign on it. The things that make our region a great travel destination are the same things that make it a great place to live, work and play. It seems visitors and residents aren’t so different after all. Remember those “Top 10 Reasons Visitors Choose To Make The Trip” on pages 4-5? They’re the same reasons people love living in our region. And tourism dollars support it all. The money that visitors spend supports the restaurants where residents love to eat, the stores where they love to shop, the museums they love to frequent and the events and performances they love to attend.

Photos by J. Holder, M. Kennedy, R. Kennedy, D. King, K. Rankin, M. Roldan, D. Savini, J. Smith and G. Widman for GPTMC; also courtesy of Citizens Bank Park, The Franklin Institute, Hyatt Regency Philadelphia at Penn’s Landing, NBC News, Pizzeria Stella and Sesame Place; Canopic Coffinette of Tutankhamun

WHAT TO PACK: SNEAKERS

NO GPS NEEDED. I'M A TOP 10 WALKING CITY, ACCORDING TO PREVENTION MAGAZINE. MY CENTER CITY GRID LAYOUT IS SUPER EASY TO NAVIGATE, AND CABS, SUBWAYS AND TRAINS TAKE PEOPLE TO MY NEIGHBORHOODS AND NEARBY SUBURBS.

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GPTMC



“GPTMC’s innovative campaigns have helped put Philadelphia on the map, positioning it as a fun, hip, urban destination that happens to have a lot of history.”

Mayor Michael A. Nutter

“It is crucial to our economic health that we invite tourists to enjoy the Philadelphia region, and GPTMC does just that.”

Governor Edward G. Rendell

Greater Philadelphia Tourism Marketing Corporation

30 S. 17th Street, Suite 1710
Philadelphia, PA 19103 • (215) 599-0776