

# Philadelphia's Gay and Lesbian Visitors



FEBRUARY 2011



## INTRODUCTION

In November 2003, GPTMC launched the groundbreaking **Philadelphia – Get Your History Straight and Your Nightlife Gay®** campaign, inviting gay and lesbian travelers to visit the Philadelphia region. Philadelphia was one of the first major United States cities to actively invite gay and lesbian travelers to visit, and over the past seven years, the \$2 million campaign has won top awards from the U.S. Travel Association, the Association of National Advertisers, Hospitality Sales and Marketing Association International, the Public Relations Society of America and *PRWeek* for its approach and effectiveness.

Most importantly, the campaign has grown gay and lesbian visitation to Philadelphia. Prior to the campaign, Philadelphia ranked outside of the top 20 destinations for LGBT travelers in Community Marketing, Inc.'s annual *LGBT Tourism* study. In 2010, Philadelphia was tied for ninth for visitation and tied for second when respondents were asked which destination was doing the best job of promoting to LGBT travelers.

Throughout the past decade, GPTMC has worked with the nationally renowned LGBT research firm Community Marketing, Inc. to ensure that our investment into the market is well-targeted and effective. Each year, GPTMC utilizes Community Marketing, Inc.'s national *LGBT Tourism Study* to compare Philadelphia to competitive destinations and monitor trends in this travel segment. In addition, GPTMC has engaged Community Marketing, Inc. for three custom studies, each with a differing methodology based on the needs of the campaign:

- In 2003, prior to the launch of the campaign, baseline market research was conducted to identify the demographic profile and location of likely visitors, ascertain trip motivators and characteristics and set realistic goals for the campaign. That study was collected online, using Community Marketing, Inc.'s national panel of respondents, and in person at gay-friendly hotels. The total sample was 1,580, including 740 respondents who had visited Philadelphia in the previous year.
- In 2005, after the launch of the campaign, return-on-investment research was conducted to determine the dollar-for-dollar impact of the campaign. This study showed an impact of \$153 in visitor spending for every \$1 spent in the initial run of the **Philadelphia – Get Your History Straight and Your Nightlife Gay** campaign. Once again, the study used a combination of online and in-person intercepts, with a total sample of 2,626, including 533 respondents who had visited Philadelphia in the past year.
- In 2011, research is needed to evaluate the continued effectiveness of the campaign, and to explore differences between Philadelphia's and national gay and lesbian travelers to help inform marketing efforts. GPTMC and Community Marketing, Inc. crafted a custom survey that was sent to Community Marketing, Inc.'s 2009 and 2010 travel survey respondents who had indicated that they visited or intended to visit Greater Philadelphia. This methodology yielded a sample of 417, including 318 respondents who had visited Philadelphia in the previous two years. In addition, Community Marketing, Inc. provided survey results of the national travel survey, allowing GPTMC to compare Philadelphia's LGBT visitors to national LGBT travelers.

GPTMC's custom survey was developed in concert with Community Marketing, Inc., adhering to the guidelines developed through their more than 15 years of experience in the LGBT market. The 10-question survey determined awareness of GPTMC marketing efforts, past visits to Philadelphia and intent to visit in the future, trip spending, trip characteristics and accommodation preferences. The survey was sent to all respondents who indicated on Community Marketing, Inc.'s 2009 and 2010 annual tourism survey that they had visited or intended to visit Greater Philadelphia, and it yielded 417 responses. The survey is appended to the back of this report for reference.

This report is divided into three primary sections, each of which provides a different basis for comparison:

1. **Greater Philadelphia Hotel Visitors:** The first section compares Greater Philadelphia's gay and lesbian hotel visitors to Philadelphia's general market hotel visitors. Comparisons are made between custom survey respondents who stayed in a hotel on their visit to the region and Greater Philadelphia visitors in Longwoods International's national syndicated Travel USA™ survey, as well as GPTMC surveys of hotel visitors booking accommodations through GPTMC's website, visitphilly.com, where appropriate.
2. **Philadelphia – Get Your History Straight and Your Nightlife Gay®:** The second section compares Philadelphia's gay and lesbian visitors who were familiar with ads from GPTMC's **Philadelphia – Get Your History Straight and Your Nightlife Gay** campaign with those who were not familiar with GPTMC's gay-friendly advertisements. All responses come from the custom survey of past and intended visitors to the region.
3. **Philadelphia and National LGBT Travelers:** The final section compares Philadelphia's LGBT visitors to the national sample of LGBT visitors in Community Marketing, Inc.'s *LGBT Tourism Study*. All responses come from Community Marketing, Inc.'s national travel survey.

For a variety of reasons, this study does not attempt to define the size or overall economic impact of the LGBT travel market to Greater Philadelphia. 36 million travelers visit the Greater Philadelphia region annually, so even a conservative estimate of the percentage of overall visitors who identify as LGBT would yield hundreds of thousands or even millions of visitors. However, sexual orientation remains a challenging question to accurately research. For this reason, Community Marketing, Inc. does not attempt to define the total size of the LGBT travel market in their annual *LGBT Tourism Study*. Furthermore, they note that results of their study (and by extension, of this one) may not represent the entire LGBT population, in part because they rely on a sample of travelers who openly self-identify as LGBT. This practice is in keeping with GPTMC's approach to other travel markets. For example, GPTMC does not compute a precise figure on the number of African-American or Hispanic travelers to Greater Philadelphia, but does keep a close eye on trends, travel patterns and demographics within those markets.

## KEY FINDINGS

### LGBT Visitation to Greater Philadelphia Is on the Rise

- Philadelphia ranked in the top 10 among destinations visited by LGBT travelers for the first time in 2010. In 2003, when GPTMC first began advertising in this market, Philadelphia did not rank in the top 20. The momentum of the gay and lesbian travel segment is a contributor to overall growth in visitation to Greater Philadelphia.
- Philadelphia is also a top 10 leisure market for both gay and lesbian travelers age 18-35. The popularity of the destination with young travelers suggests a bright future for this travel segment.
- Gay and lesbian travel to Philadelphia did not slow down during the Great Recession. While national LGBT travelers reported a slight decrease in travel activity over the past year, LGBT visitors to Philadelphia reported a net increase in their overall travel, with 35% increasing their travel activity and just 23% decreasing.
- Gay and lesbian hotel visitors are spending more and staying longer than they did in 2005, when research was last conducted on Philadelphia's gay and lesbian market. Spending increased 21% per party, from \$726 in 2005 to \$878 in 2010, while length of stay increased 24%, from 2.5 nights in 2005 to 3.1 nights in 2010.

### Philadelphia – Get Your History Straight and Your Nightlife Gay® Is Delivering

- Awareness of the **Philadelphia – Get Your History Straight and Your Nightlife Gay®** creative and tagline are strong. 43% of respondents were familiar with at least one of the advertisements they were shown, with GPTMC's iconic Betsy Ross-inspired ad from 2003 still the most frequently recognized. 14% of respondents were able to correctly write the tagline of the campaign without any prompting.
- Those familiar with the campaign are spending more and staying longer in the Philadelphia region. Visitors familiar with the campaign spent an average of \$1,013 per party on their stay, 36% more than the \$743 spent by visitors unfamiliar with the campaign. "Aware" visitors stayed an average of 3.5 nights, compared to 3.0 for those unfamiliar. That figure climbs to 4.4 nights for visitors who could identify the campaign tagline.
- Visitors aware of the campaign were more likely to stay in a hotel on their visit (82% compared to 63% for unaware visitors). They were also more likely to choose luxury or boutique hotels (43% compared to 20% for unaware visitors).
- Visitors aware of the campaign were less motivated by free offerings when choosing a hotel stay (such as Internet access, breakfast and parking). Instead, they were more interested in factors like the brand reputation and outreach of a hotel and its proximity to gay bars and restaurants.

**The Entire Destination Benefits from Gay and Lesbian Travelers**

- Many gay and lesbian visitors show equal or greater interest in vacation activities that are not LGBT-specific. When asked their reason for visiting Philadelphia, top responses included “been there before and liked it,” “visit friends and family” and “see local historic sites.”
- More gay and lesbian visitors said that their reason for visiting was a non-gay event (29%) than said they came because of a LGBT event (24%).
- Philadelphia's gay and lesbian hotel visitors are extremely loyal, with 90% reporting they had visited before and 84% intending to return within the next year. 38% consider themselves to be frequent visitors. Due to their familiarity, these visitors are able to explore different aspects of the region each time they return.
- Gay and lesbian hotel visitors are spending 57% more per travel party than general market visitors—\$878 compared to \$559. Hotels are the primary beneficiary, with lodging spending up 75%, but gay and lesbian visitors also spend more than average in Philadelphia's restaurants (68% more on food and beverage) and stores (52% more on shopping).

## GREATER PHILADELPHIA HOTEL VISITORS

### Methodology

Data on gay and lesbian hotel visitors were drawn from a custom survey designed by GPTMC and Community Marketing, Inc. The online survey was sent to the 2009 and 2010 Community Marketing, Inc. national tourism survey respondents who indicated that they had visited or were interested in visiting Philadelphia. **This section of the report only includes respondents who have visited Philadelphia during the previous 24 months and stayed in a hotel on their visit.**

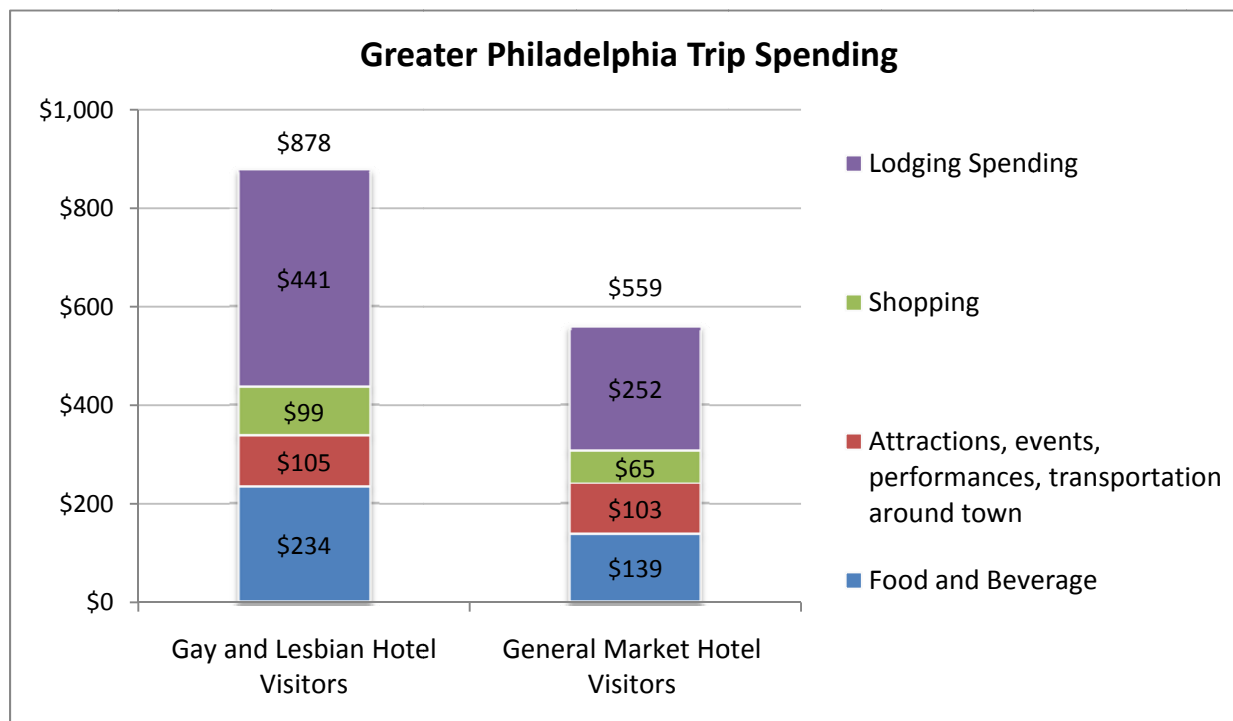
This section makes comparisons to two different groups of general market hotel visitors. The first is drawn from Longwoods International's nationally syndicated Travel USA™ survey, which provides data on spending and trip characteristics for general market hotel visitors. The second is GPTMC's surveys of hotel visitors booking reservations through GPTMC's website, visitphilly.com, which provides data on visitor loyalty and intent to return.

This section covers the trip spending, trip characteristics and travel motivators for gay and lesbian hotel visitors to Greater Philadelphia. Top findings include:

- Gay and lesbian hotel visitors are spending more and staying longer in the Philadelphia region than their counterparts in the general market.
- Gay and lesbian hotel visitors are spending more and staying longer in the Philadelphia region than they were in 2005, when research on this market was last conducted.
- Philadelphia's gay and lesbian hotel visitors are extremely loyal, returning year after year.
- While many are visiting for gay-specific nightlife or events, many are also visiting friends, seeing historic sites or simply returning because they have had positive experiences in the past. Greater Philadelphia's mainstream offerings clearly appeal to the gay and lesbian market as well.

## Trip Spending

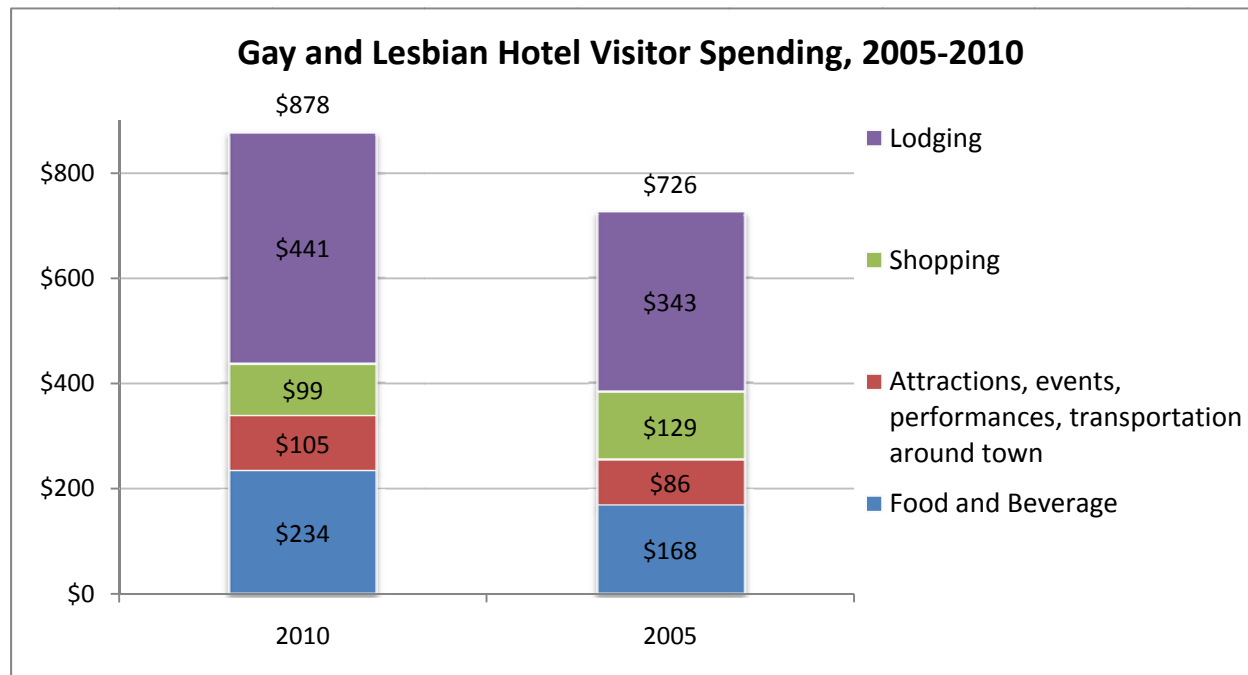
- Compared to general market visitors, gay and lesbian hotel visitors spent \$319 (or 57%) more during their visits, or \$43 more per day.<sup>1</sup>
  - Gay and lesbian travelers spent 75% more on their lodging than general market visitors (\$441 vs. \$252) and 68% more on food and beverage (\$234 vs. \$139).
  - There was little difference seen in the attractions, events, performances and transportation spending.



<sup>1</sup> Comparison made to Greater Philadelphia hotel visitors from Longwoods International, 2008 & 2009 Travel USA™ survey.

Note: Food and Beverage were asked separately for the gay and lesbian hotel visitors, but together for the general market visitors. Transportation around town and attractions, events and performances were asked as separate categories for the general market visitors, but together for LGBT visitors.

- Gay and lesbian hotel visitors reported 21% higher spending in 2010 than in 2005.<sup>2</sup>



## Trip Characteristics

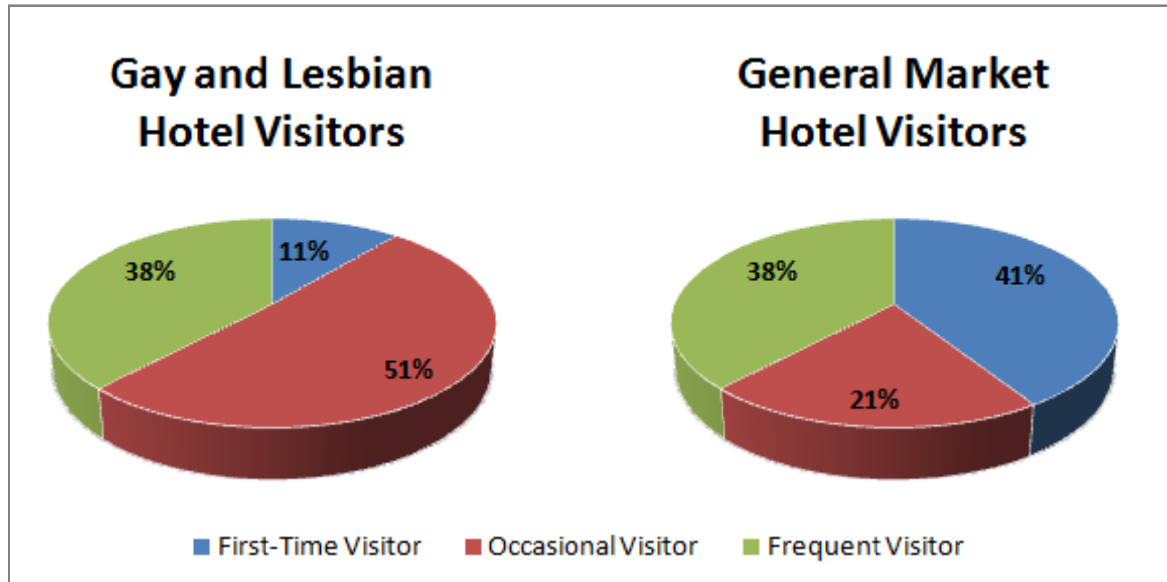
- Gay and lesbian hotel visitors stayed 63% longer in the Philadelphia region than general market hotel visitors.<sup>3</sup>
  - They are also spending more time than in previous years. On average, gay and lesbian visitors spent 3.1 nights, compared to only 2.5 in 2005—an increase of 24%.

<sup>2</sup> Comparison made to gay and lesbian visitors from Gay Tourism 2005, GPTMC and Community Marketing. Note: Food and Beverage were asked separately in 2010, but asked together in 2005.

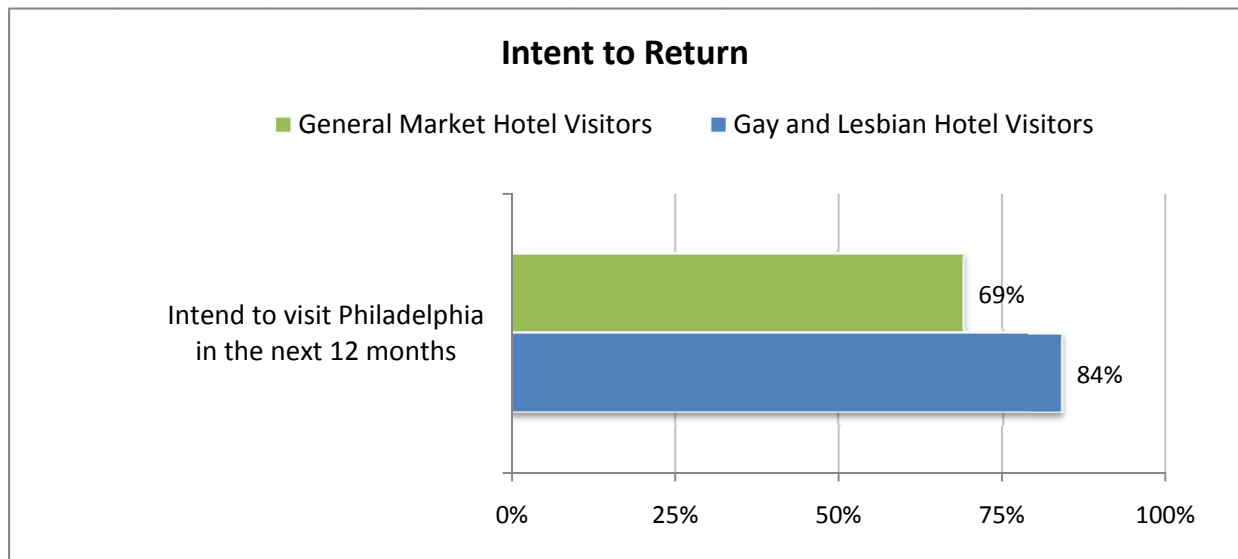
<sup>3</sup> Comparison made to visitphilly.com survey respondents from Winter 2008-09 to Summer 2010 surveys.



- Philadelphia gay and lesbian visitors loyally return to Philadelphia.
  - Nine out of 10 visitors had been here before; only one was visiting for the first time. Among general market visitors, only six out of 10 had been to Philadelphia before.<sup>4</sup>
  - 41% of gay and lesbian visitors considered themselves frequent visitors.



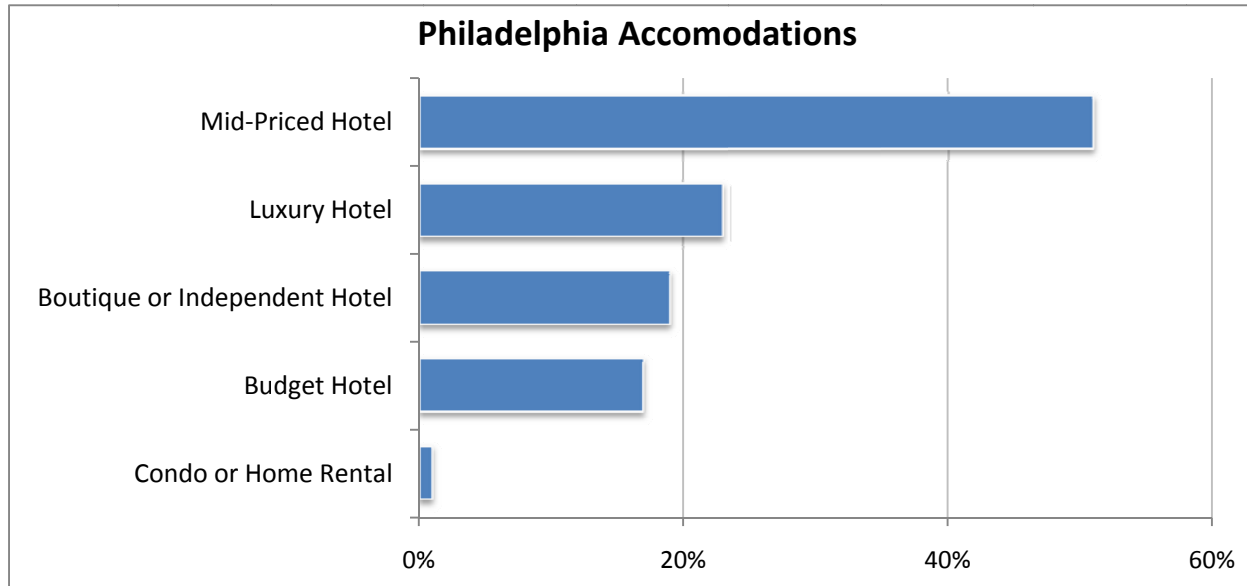
- 84% of gay and lesbian travelers intended to return to Philadelphia in the next year, compared with 69% of general market travelers.<sup>5</sup>



<sup>4</sup> Comparison made to visitphilly.com survey respondents from Winter 2008-09 to Summer 2010 surveys.

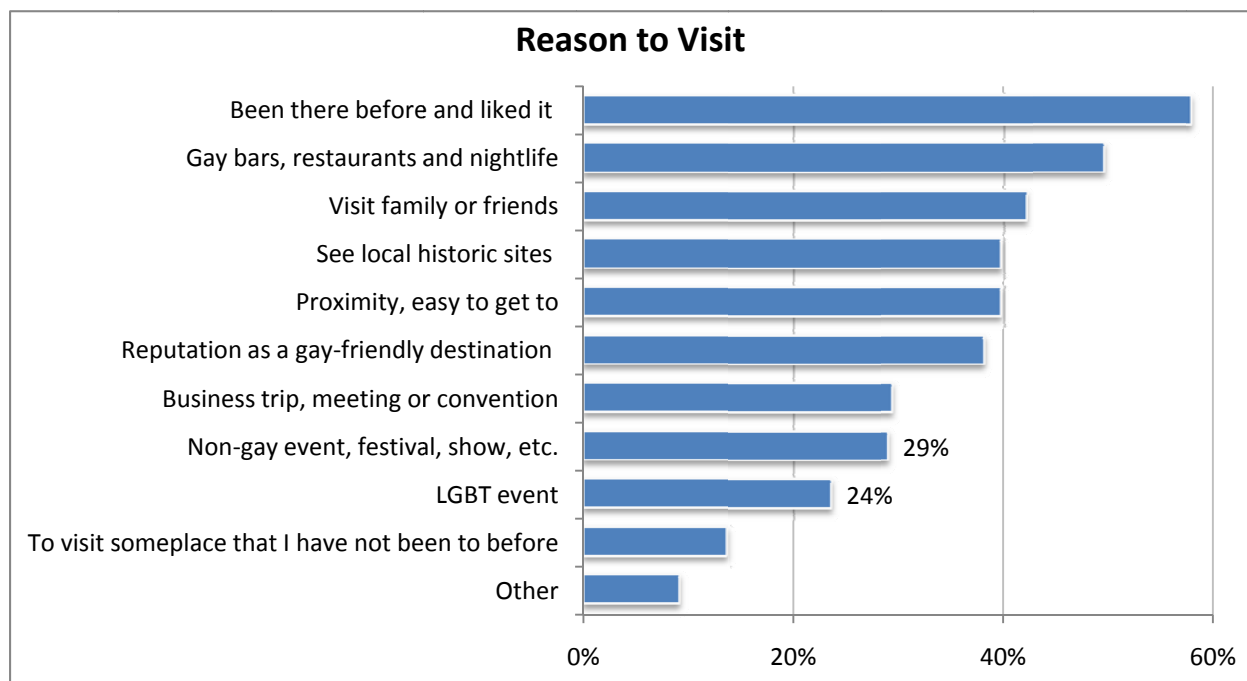
<sup>5</sup> Comparison made to visitphilly.com survey respondents from Winter 2008-09 to Summer 2010 surveys. This only included those who had visited, not those who intended to visit, from the CMI 2011 study.

- Visitors were most likely to stay in a mid-priced hotel (51%), a luxury hotel (23%) or a boutique hotel (19%).



## Travel Motivators

- *Been there before and liked it* and *gay bars, restaurants and nightlife* were the primary reasons for planning a trip to Philadelphia. (58 and 50%)
  - 24% of visitors came to attend a LGBT event, while 29% came to attend a non-gay event.
  - Many visitors came to Philadelphia to visit friends and family, both in the general market (52%) and among gay and lesbian visitors (49%).



## PHILADELPHIA – GET YOUR HISTORY STRAIGHT AND YOUR NIGHTLIFE GAY®

### Methodology

In November 2003, GPTMC launched the groundbreaking **Philadelphia – Get Your History Straight and Your Nightlife Gay®** campaign, inviting gay and lesbian travelers to visit the Philadelphia region. Over the past seven years, tactics and creative executions have changed, but the award-winning campaign has remained a recognized leader in the gay and lesbian travel market.

To date, GPTMC has spent more than \$2 million on the gay campaign. This spending is divided among several elements, including:

- Advertising
- Public relations
- Event-based marketing
- Partnerships
- Online

Not only has the campaign paid off in terms of increased visitation and spending from the gay and lesbian travel market, as documented throughout this report, but **Philadelphia – Get Your History Straight and Your Nightlife Gay®** has won several top awards for its approach and effectiveness, including honors from the U.S. Travel Association, the Association of National Advertisers, Hospitality Sales and Marketing Association International, the Public Relations Society of America and *PRWeek*.

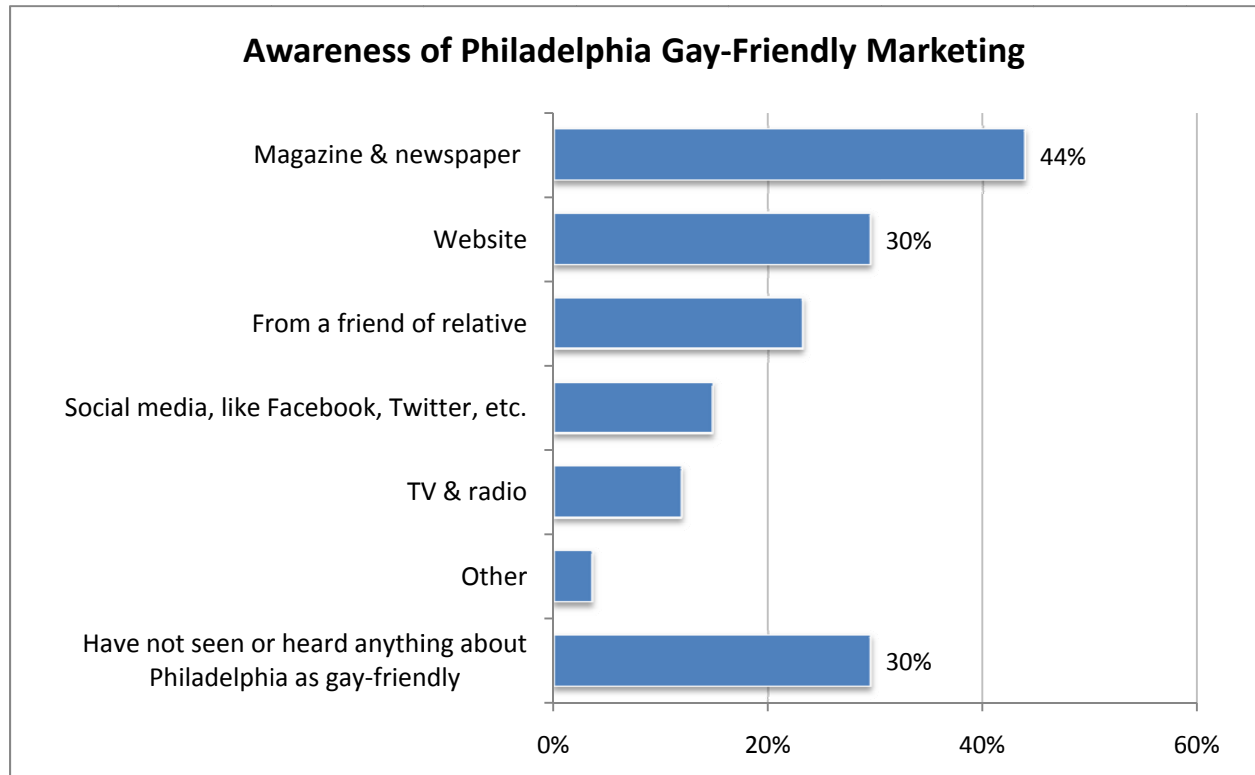
This section of the report relies on GPTMC's custom survey, which asked respondents their awareness of GPTMC's gay and lesbian marketing efforts in general, the tagline of the campaign and specific creative executions. The majority of this section compares those visitors who were familiar with GPTMC's gay and lesbian advertising campaign with those not familiar with the campaign. **This section of the report includes both respondents who have visited Philadelphia over the previous 24 months, and those who intend to visit over the next 12 months.** Among those who have visited Philadelphia, the majority—but not all—stayed in a hotel.

Top findings in this section include:

- Awareness of the **Philadelphia – Get Your History Straight and Your Nightlife Gay®** campaign and tagline are very strong among gay and lesbian travelers to Philadelphia.
- Visitors aware of the campaign are spending more and staying longer in the region, and they are more likely to return.
- Visitors aware of the campaign were less motivated by free offerings when selecting their hotel stay and more interested in the individual attributes of the hotel and its location.

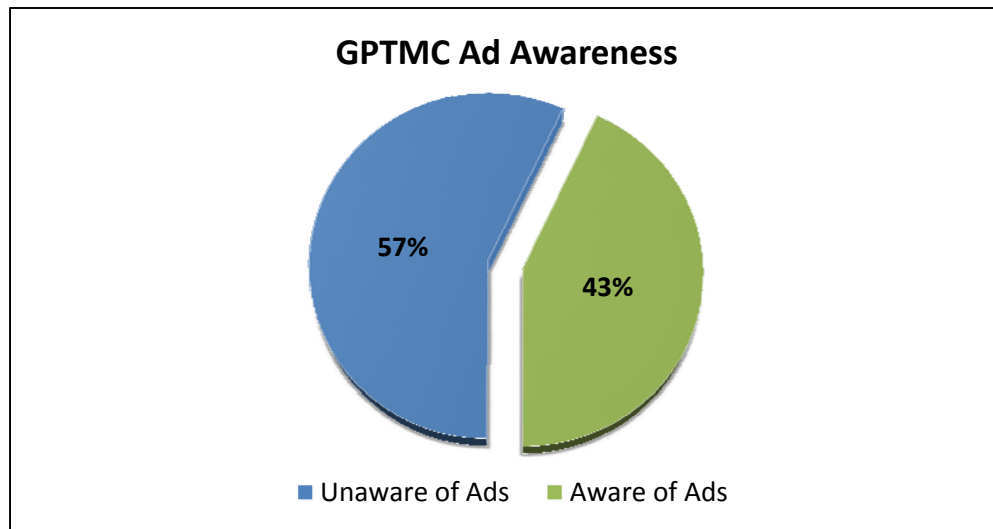
## Marketing Awareness

- Seven out of 10 respondents had seen or heard something portraying Philadelphia as gay-friendly in the past year. Those people most likely saw it in a magazine or newspaper (44%) or website (30%).



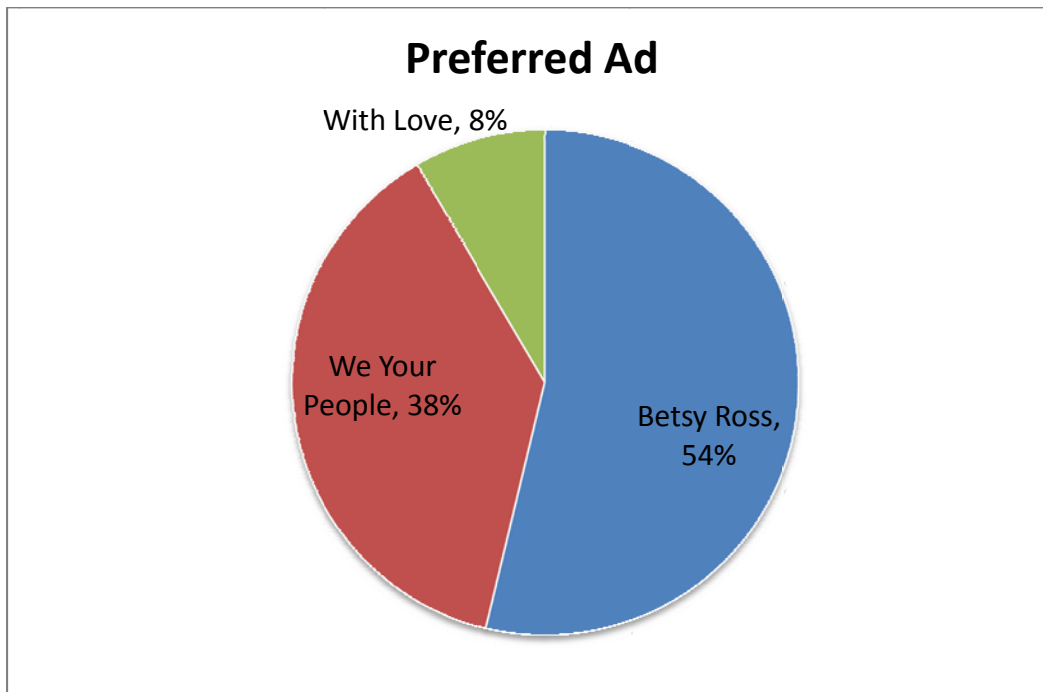
- Repeat visitors were very likely to have heard about Philadelphia as gay-friendly (73%). Less than half of first-time visitors had heard anything regarding Philadelphia as gay friendly (48%).
- 14% of respondents were able to correctly identify GPTMC's "Get Your History Straight and Your Nightlife Gay" tagline unprompted.
  - More than two-thirds of the 20% of visitors who thought they were familiar with the tagline were able to identify it correctly.

- When shown GPTMC's gay-friendly ads, 43% of Philadelphia gay and lesbian visitors had seen at least one of the three ads.



- The Betsy Ross-inspired ad was the most recognized, with 36% of respondents having seen it. Comparatively, only 16% had seen “We Your People,” and 12% had seen **With Love, Philadelphia XOXO®**.
  - Awareness seems to be increasing: In GPTMC’s 2005 survey, only 30% of visitors had seen the Betsy Ross ad (which has not run since 2005).

- The Betsy Ross ad was also the most preferred of the three:

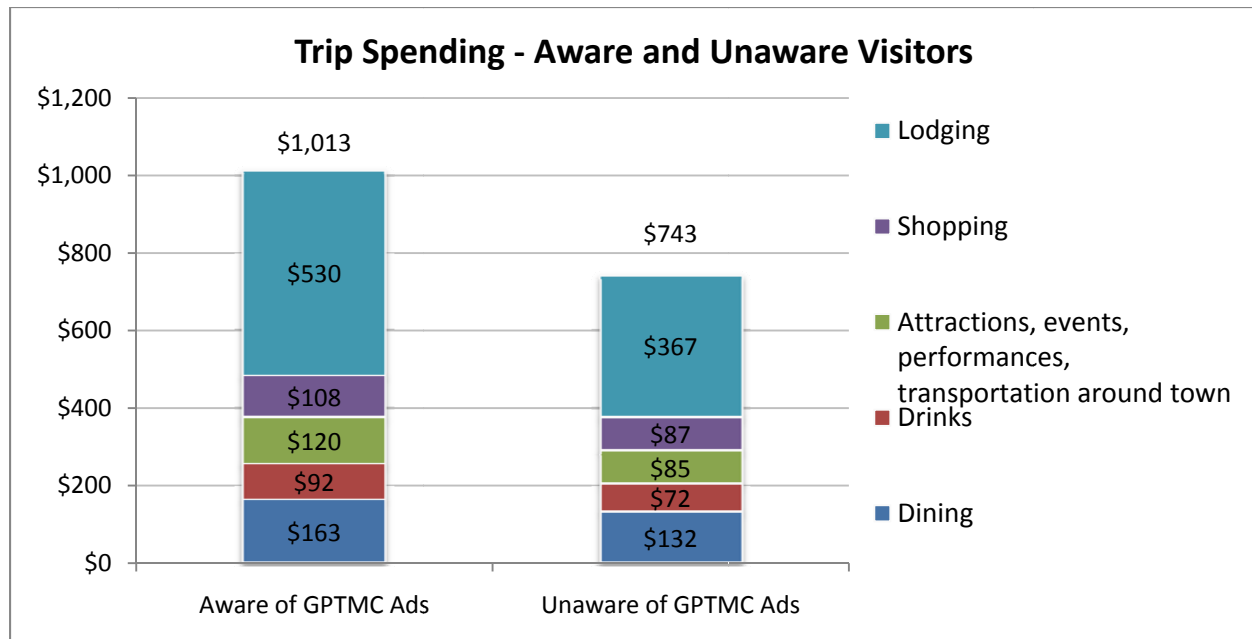


### Advertising-Aware Visitors

Visitors who were aware of the **Philadelphia – Get Your History Straight and Your Nightlife Gay®** creative had different experiences when they made the trip to Philadelphia. Advertising-aware visitors spent more, stayed longer and were more likely to return than those who were not familiar with the campaign.

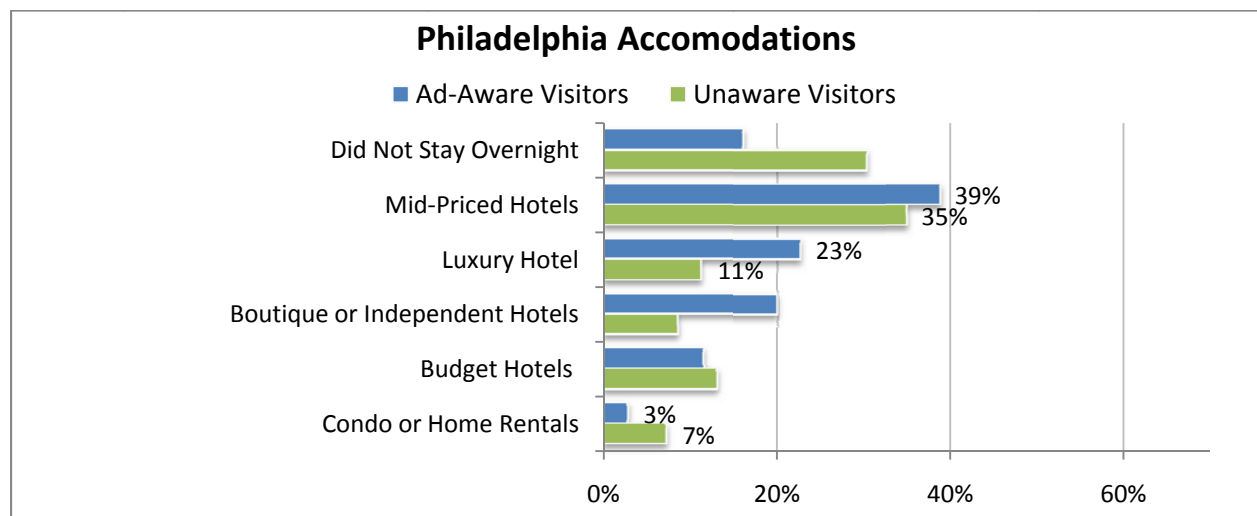
### Trip Spending

- On average, gay and lesbian visitors to Philadelphia spent \$270 (or 36% more) more during their visit if they had seen GPTMC gay-friendly advertising.
  - Those who had seen the **With Love** ads spent slightly more on their entire trip than those who had seen the Betsy Ross and “We Your People” ads.



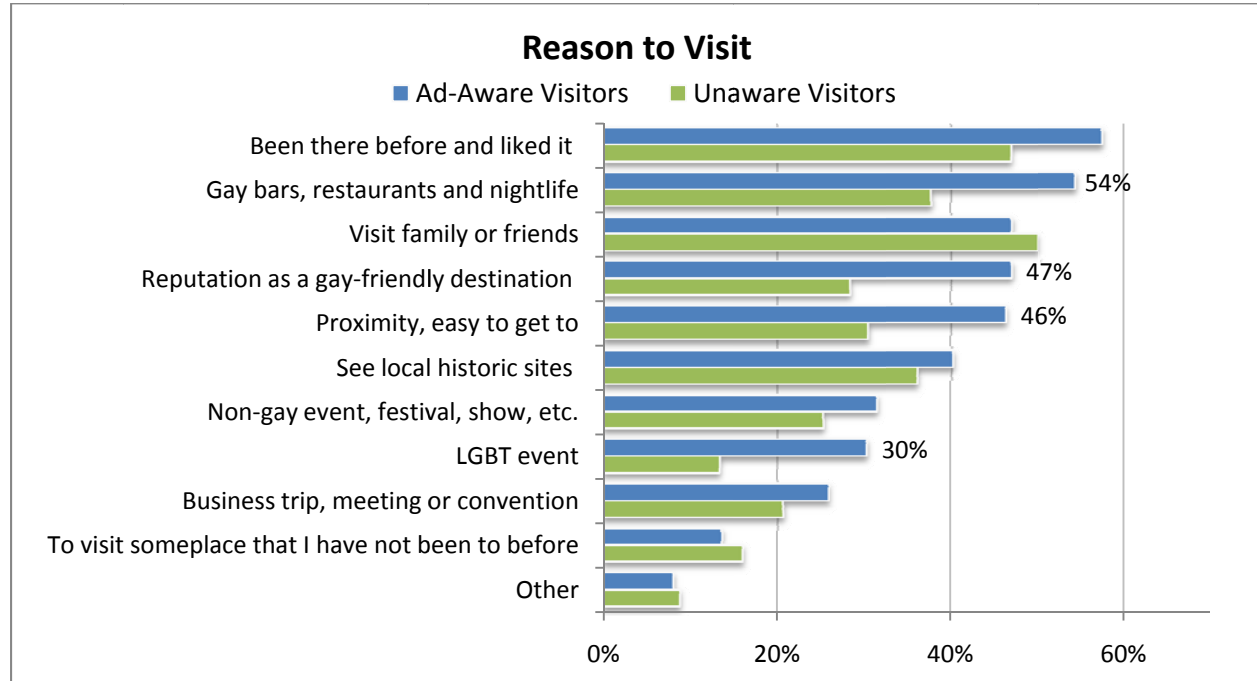
## Trip Characteristics

- On average, visitors who were aware of the ads stayed for 3.5 nights versus 3.0 for those unaware.
  - Those who recalled the tagline correctly stayed an average 4.4 nights.
- Intent to return was higher: 73% of those aware of the ads had visited in the past year and intended to return, compared with only 55% of unaware respondents.
- 82% of aware visitors stayed in a hotel, 3% stayed in a rental property and 16% didn't stay overnight. Among unaware visitors, only 63% stayed in a hotel, 7% stayed in a rental and 30% didn't stay overnight.
  - Aware visitors were more likely to stay at a luxury (23% vs. 11%) or a boutique hotel (20% vs. 9%) than unaware respondents.

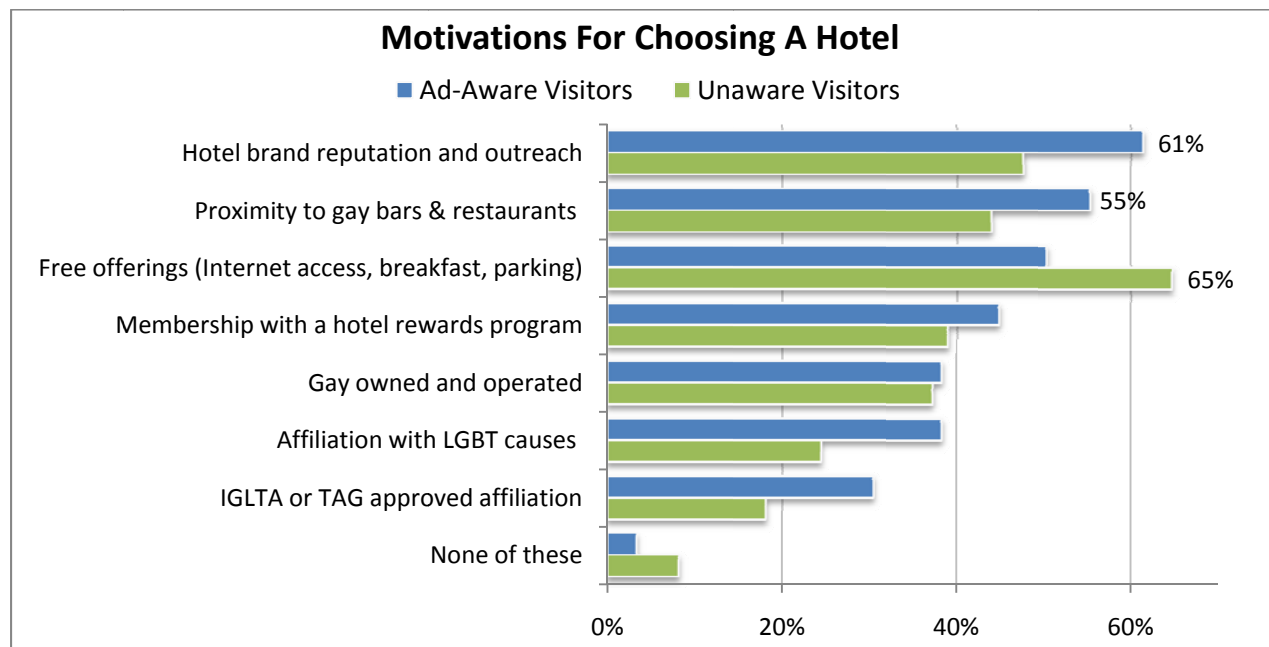


## Travel Motivators

- Compared to those who were unaware of the ads, those who were aware were significantly more likely to be planning to visit because of the *gay bars, restaurants and nightlife*; because of Philadelphia's *reputation as a gay-friendly destination*; its *proximity*; or for a *LGBT event*.



- Philadelphia travelers aware of the ads were more motivated by *hotel brand reputation and outreach* and *proximity to gay bars and restaurants* than they were by *free offerings*.
  - Free offerings* were the most influential factor in choosing a hotel for those who had never seen GPTMC gay-friendly advertising.





## PHILADELPHIA AND NATIONAL LGBT TRAVELERS

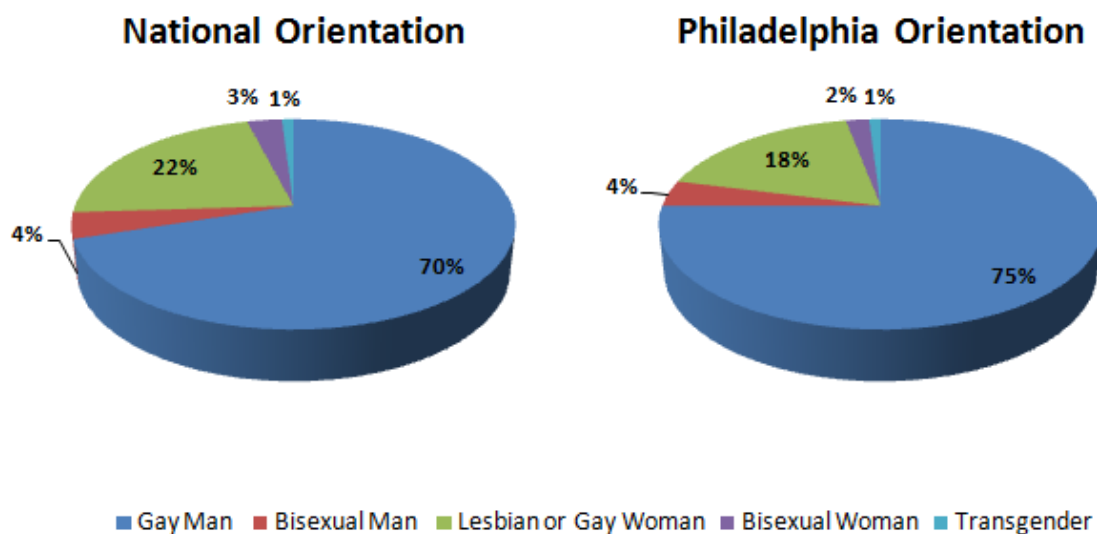
### Methodology

The final section of the report utilizes data from Community Marketing, Inc.'s annual *LGBT Tourism Study*. In November 2010, the company released the 15<sup>th</sup> edition of the report, using data collected in October 2010. Community Marketing, Inc. is among the foremost national experts on the LGBT travel market, and the annual travel survey serves as a benchmark for all destinations. The survey has a sample size of 6,884 drawn from across the nation.

**This section of the report includes both respondents who have visited Philadelphia over the previous 24 months and those who intend to visit over the next 12 months.** Community Marketing, Inc. provided GPTMC with the responses of these visitors and intenders, as well as the responses of the full sample. From that, GPTMC compared the answers of Philadelphia's LGBT visitors and national LGBT travelers to the same questions, administered with the same methodology. This process yielded valuable insights on some unique attributes of Greater Philadelphia's LGBT visitors. The section also contains destination rankings reprinted from the LGBT tourism study. These rankings help to place Philadelphia's growing LGBT visitation in a national context.

Top findings for this section include:

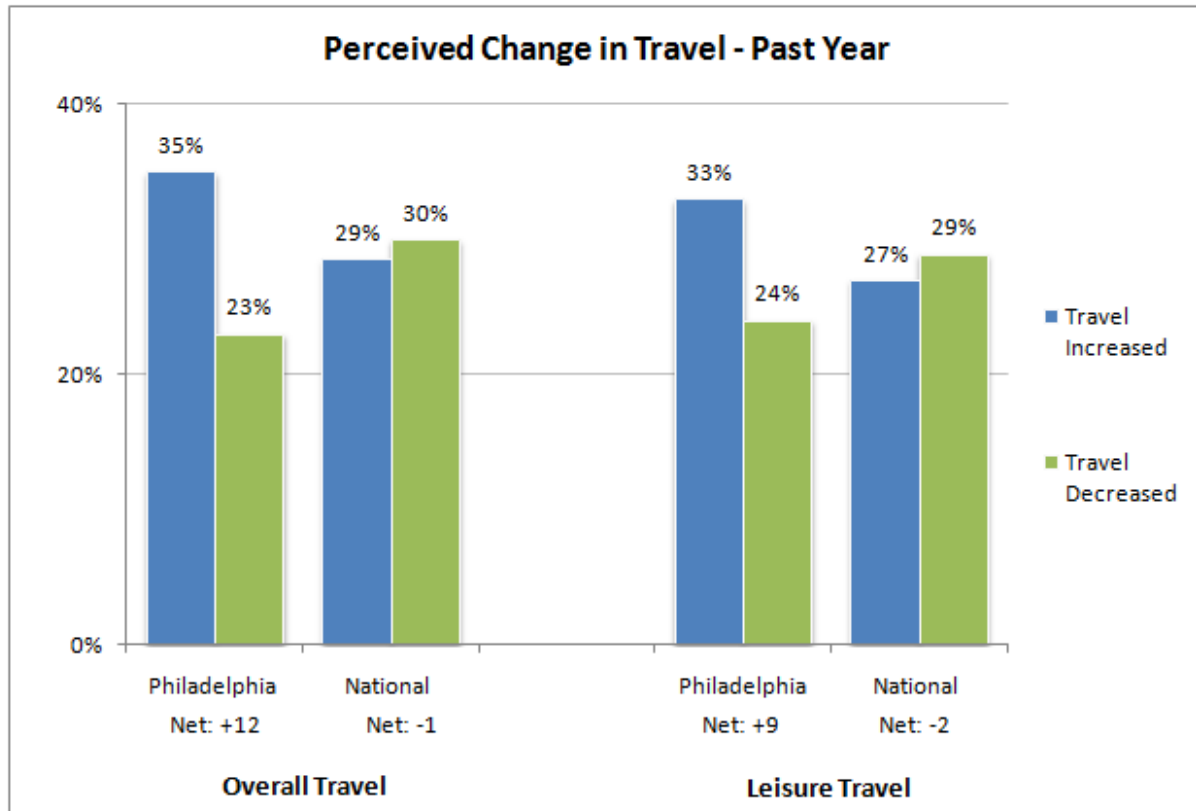
- Philadelphia's LGBT visitors have increased their travel over the past year, while LGBT visitors nationwide are traveling slightly less.
- Philadelphia's LGBT visitors were more likely to travel for *exploring new destinations, visiting family and friends* and *culture* than national LGBT travelers.
- Philadelphia now ranks among the top 10 most-visited destinations for LGBT travelers; it did not appear in the top 20 in 2003. In addition, Philadelphia tied for second place in the list of destinations most effective in promoting themselves to the LGBT community, according to respondents.



## Travel Characteristics

In attempting to gauge the economy's effect on travel, Community Marketing, Inc. asks LGBT travelers to report changes in their amount of travel.

- For both overall travel and leisure travel, Philadelphia visitors report significant increases in travel over the past year, while national visitors report a net decrease.

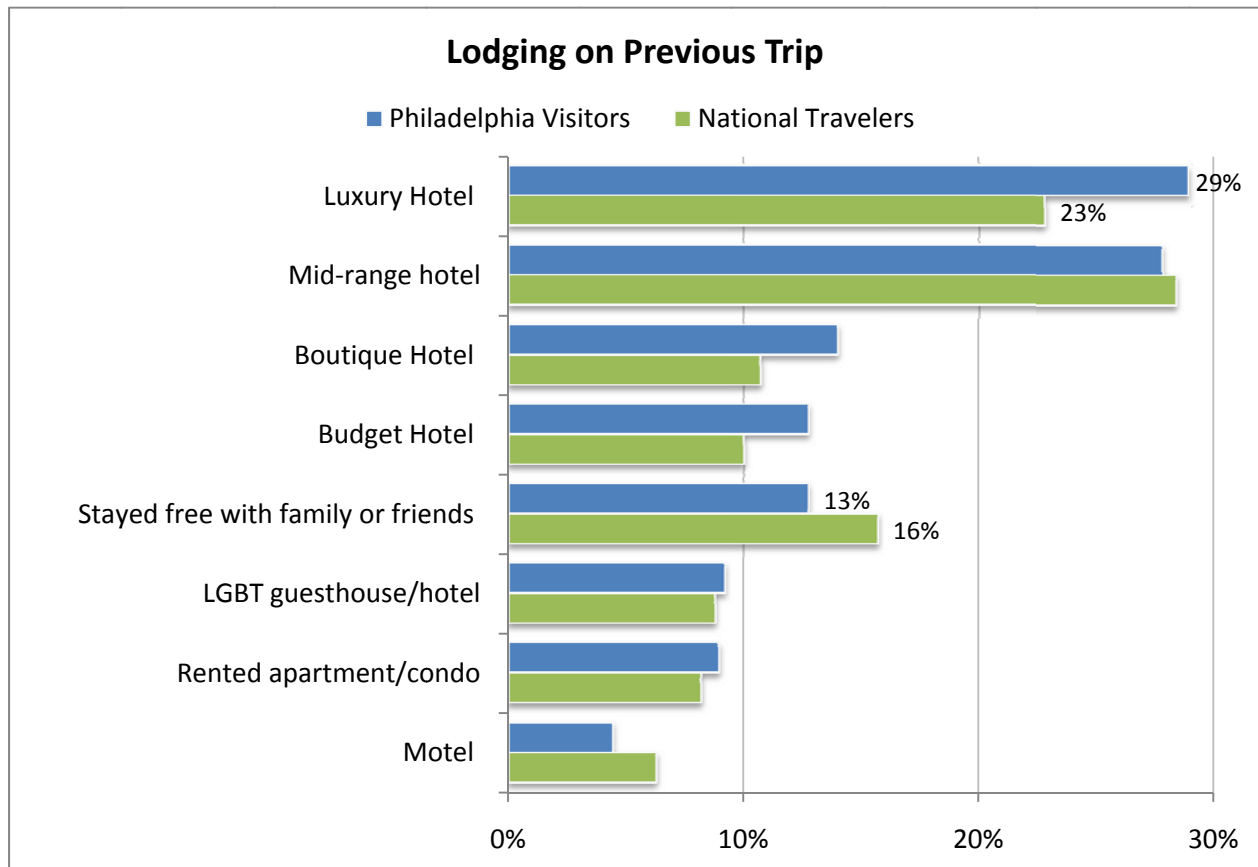


- Philadelphia LGBT visitors spent more time traveling in the past year than national LGBT travelers.

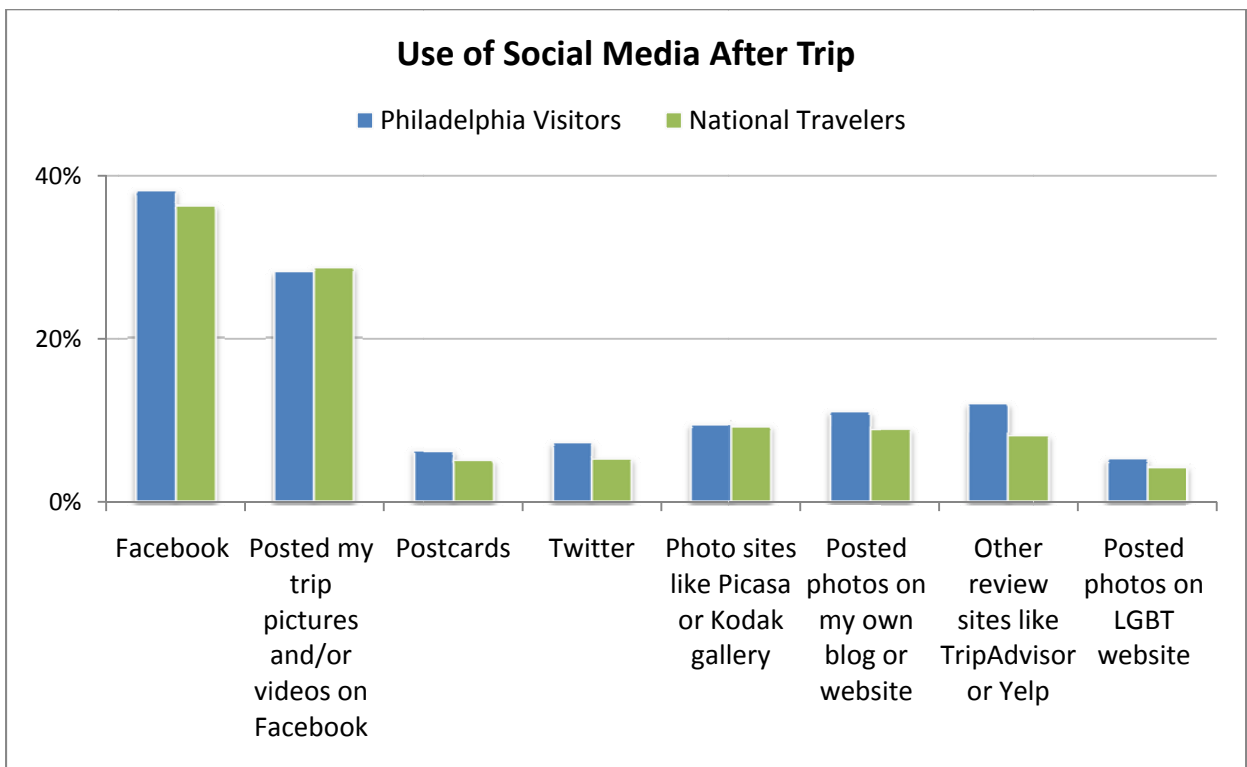
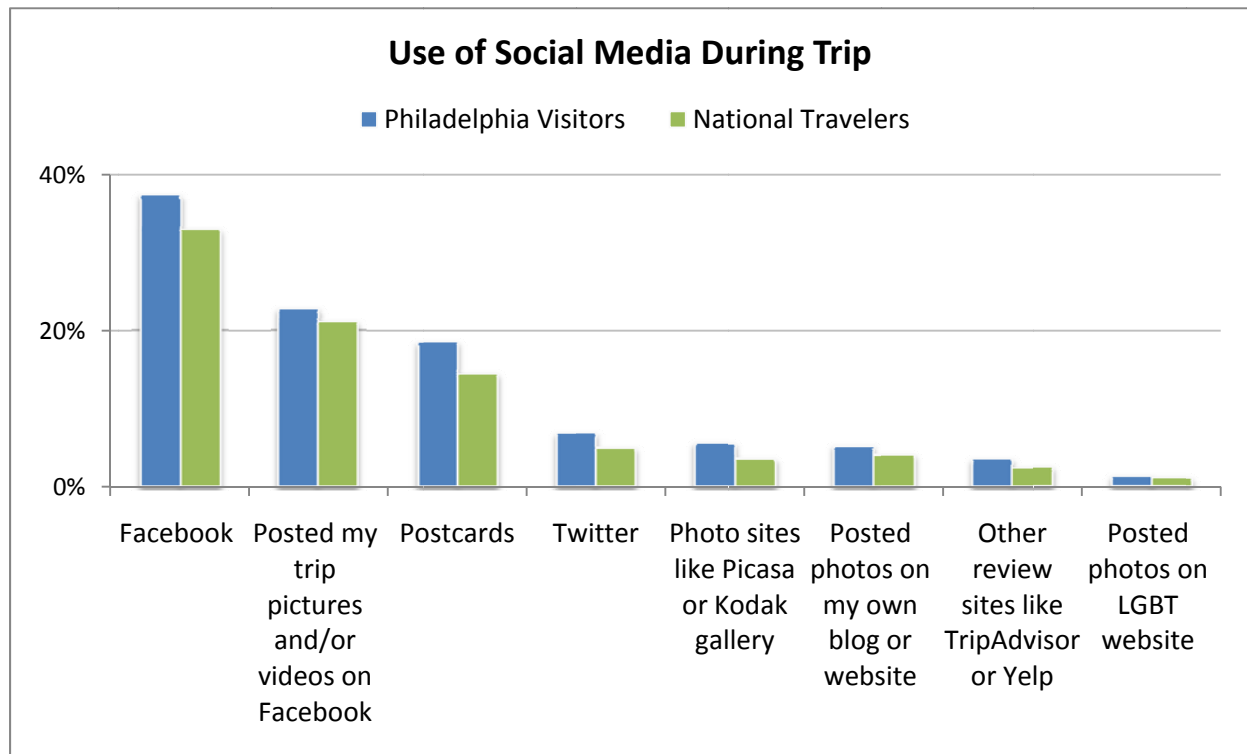
## Trip Frequency and Length

	Philadelphia Visitors	National Travelers	% Difference
Leisure Trip Length in Days (Avg)	4.5	3.6	25%
Business Trip Length in Days (Avg)	3.3	1.9	74%
Nights in a Hotel (while visiting another city for an event)	2.7	2.2	38%
Roundtrip Flights (per year)	4.8	3.2	50%
Nights in Paid Accommodations (per year)	14.4	10.7	35%

- Philadelphia visitors were more likely to have stayed in a hotel during their past vacation than national LGBT travelers and less likely to have stayed with friends and family.
  - Among hotels, Philadelphia visitors were more likely to have stayed in a luxury or boutique hotel.



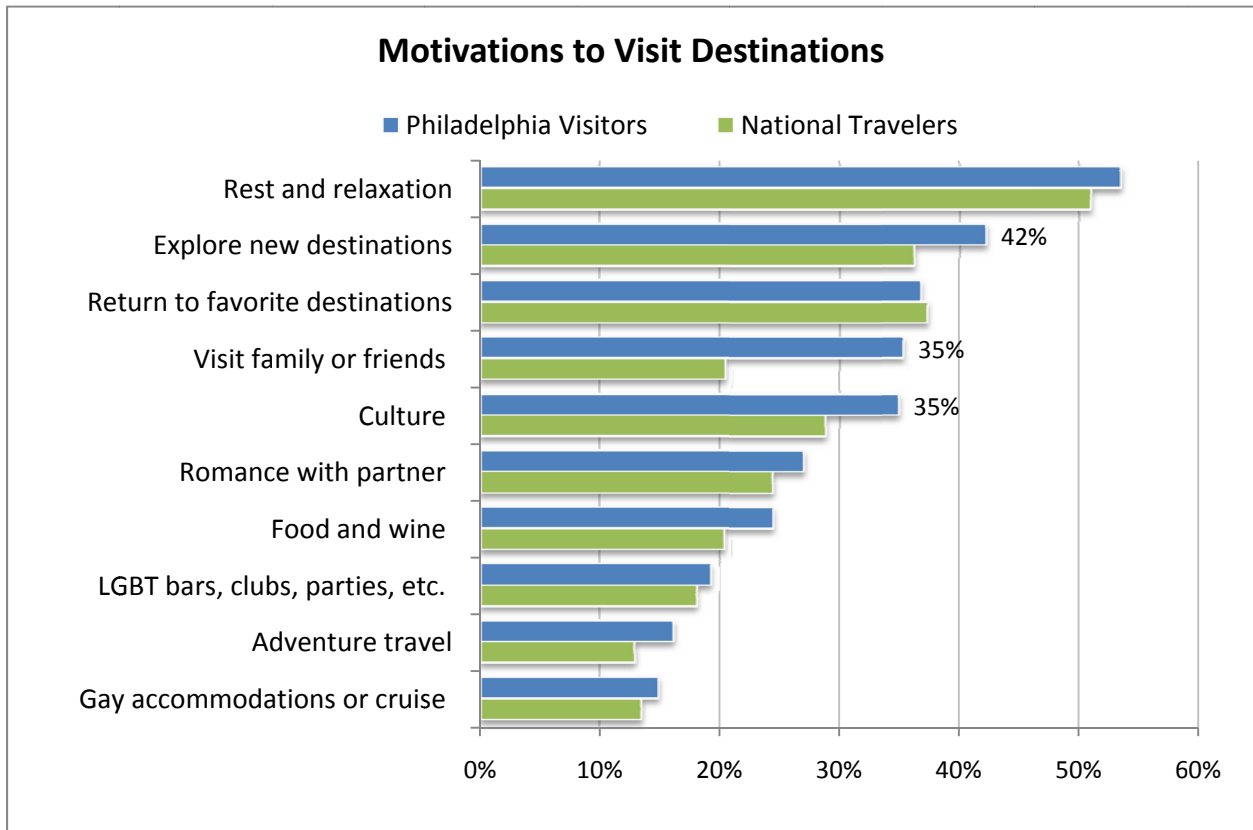
- Social media plays a more active role in travel among Philadelphia visitors, both during and after their trips



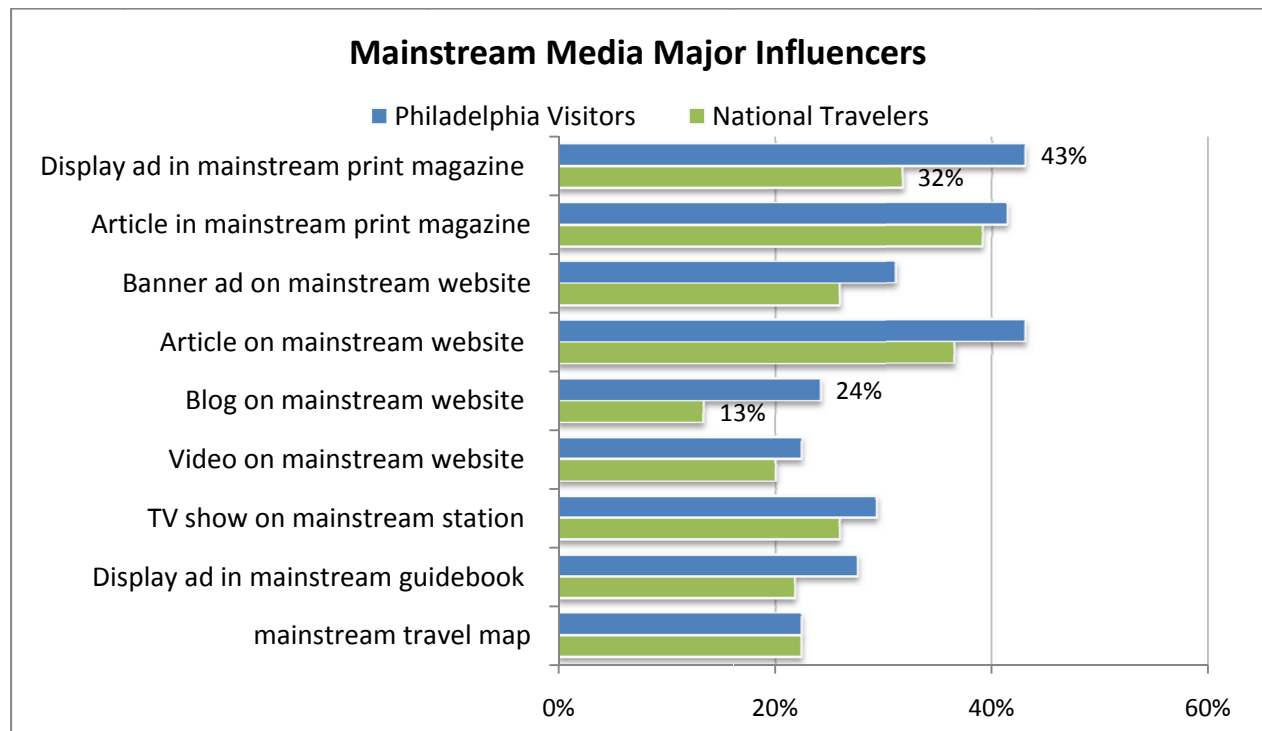
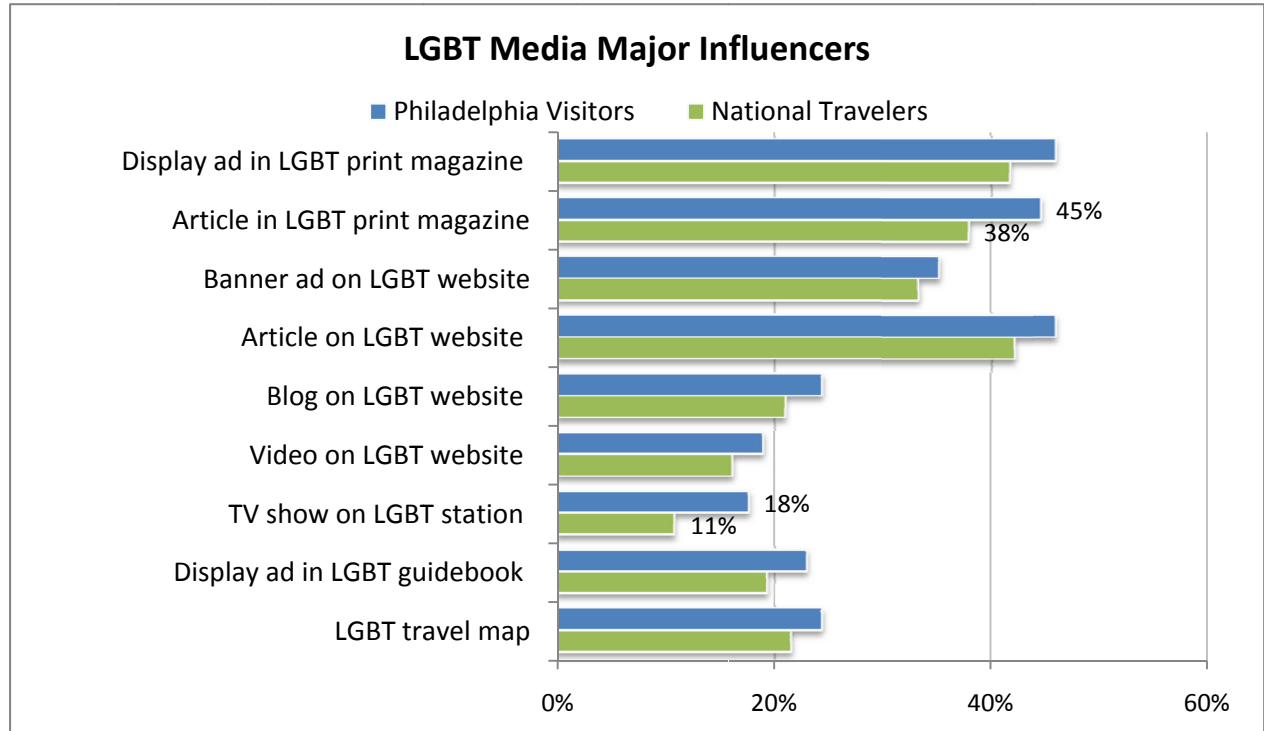
- Top activities for LGBT travelers, both to Philadelphia and nationally, include *neighborhood restaurants*, *LGBT neighborhood* and *visiting popular mainstream attractions*.

## Travel Motivators

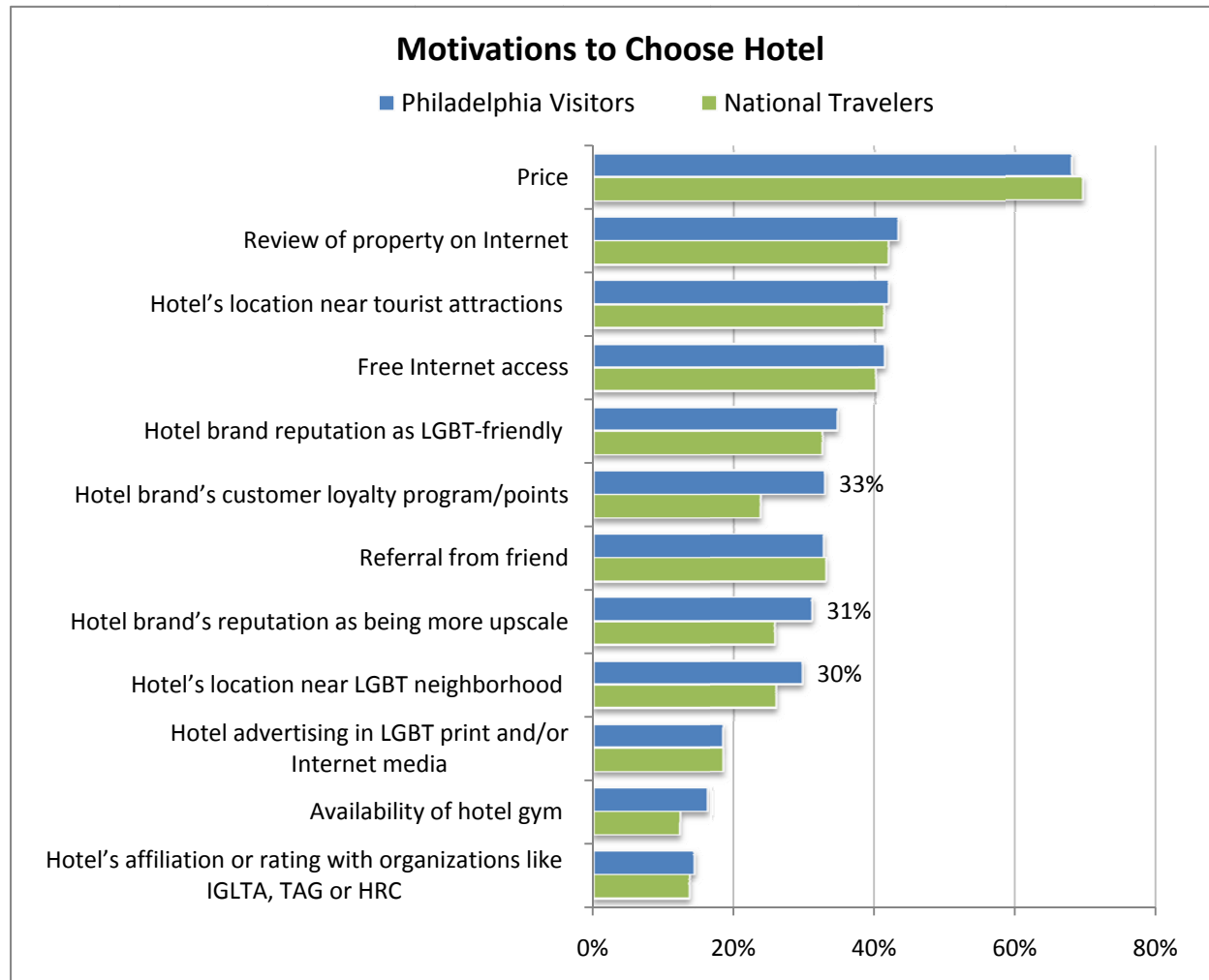
- *Exploring new destinations, visiting family and friends* and *culture* were more often major influencers for Philadelphia travelers than for other destinations.



- Among those influenced by mainstream media, Philadelphia visitors were more influenced by a *display ad in mainstream print magazine* or a *blog on mainstream website* than national travelers.



- *Price* was the most motivating factor for choosing a hotel, with 68% of Philadelphia visitors and 70% of national travelers choosing it as very motivating.
  - Philadelphia visitors were more motivated to choose one hotel over another because of its *customer loyalty program/points* than national travelers (33% vs. 24%)



## Travel Ranking

According to Community Marketing, Inc.'s 2010-11 15<sup>th</sup> annual *LGBT Tourism Study*:

- Philadelphia ranks as one of the top 10 most-visited destinations for LGBT visitors in 2010:

	<u>Total Leisure and Business</u>
1. New York City	27%
2. San Francisco	23%
3. Las Vegas	22%
3. Chicago	22%
3. Los Angeles	22%
6. Washington, DC	21%
7. Fort Lauderdale	14%
7. San Diego, CA	14%
9. Boston, MA	12%
9. Orlando, FL	12%
<b>9. Philadelphia</b>	<b>12%</b>
9. Seattle	12%
13. Miami	11%
13. New Orleans	11%
13. Palm Springs	11%
13. Atlanta	11%
17. Dallas	10%
17. Denver	10%
17. Phoenix	10%
20. Baltimore	8%
20. Napa County, CA	8%
20. Sonoma County, CA	8%
20. Portland	8%
20. Tampa	8%

- In addition to the overall list, Philadelphia ranks in the top 10 among:
  - Leisure trip, gay men 18-35 (tied for 10)
  - Leisure trip, gay men 36-54 (tied for 10)
  - Leisure trip, lesbians 18-35 (10)
  - Business trip, full sample (tied for 10)
- Philadelphia is identified as one of the destinations that has done the best job promoting themselves to the LGBT community:

Las Vegas:	11%
San Francisco:	7%
Palm Springs:	7%
<b>Philadelphia:</b>	<b>7%</b>
Provincetown:	5%



## APPENDIX – CUSTOM PHILADELPHIA SURVEY

*Note: Questions appear as they were seen by respondents. Not all questions were asked of all respondents, based on their answers to previous questions.*

Thank you for taking this brief survey on travel to Greater Philadelphia. We use terms in the survey that have very specific meanings:

(1) When we use the term “visit,” we mean you traveled to a destination and spent at least one paid night in a hotel/guesthouse/condo rental (i.e. you paid for your overnight accommodations—not stayed with friends).

(2) When we use the term “Philadelphia,” we are referring to the city of Philadelphia and its four surrounding counties: Bucks, Chester, Montgomery and Delaware. Some attractions included in this area are New Hope, King of Prussia, Valley Forge and Longwood Gardens.

1. Which of the following best describes your visits to Philadelphia over the past two years?
  - Visited Philadelphia in the past 24 months, and intend visit again in the next 12 months
  - Visited Philadelphia in the past 24 months, but do not intend to again in the next 12 months
  - Have not visited Philadelphia in the past 24 months, but plan to visit in the next 12 months
  - Have not visited Philadelphia in the past 24 months, and do not plan to visit in the next 12 months
2. Had you ever visited Philadelphia prior to your most recent trip?
  - No, this was my first visit
  - Yes, I have visited Philadelphia a couple/few times
  - Yes, I am a frequent visitor to Philadelphia
2. Why are you planning on visiting in the next 12 months? Please select all that apply.
  - See local historic sites, like the Liberty Bell, Independence Hall, etc.
  - LGBT event
  - Gay bars, restaurants and nightlife
  - Reputation as a gay-friendly destination
  - Non-gay event, festival, show, exhibition or cultural event
  - Business trip, meeting or convention
  - Visit family or friends
  - Been there before and liked it
  - Proximity, easy to get to
  - To visit someplace that I have not been to before
  - Other: \_\_\_\_\_

3. In the past year, have you seen or heard anything that portrays Philadelphia as a gay-friendly destination on any of the following? Select all that apply.
- Magazine & Newspaper
  - Website
  - Social Media, like Facebook, Twitter, etc.
  - TV & Radio
  - From a friend or relative
  - Other: \_\_\_\_\_
  - None of the above (I haven't seen or heard anything about Philadelphia as a gay-friendly destination.)
4. Do you know the message or "tagline" for Philadelphia's gay-friendly advertising campaign?
- Yes, I think I know the tagline
  - I saw advertising for Philadelphia, but do not recall the message
  - I did not see anything about Philadelphia
- 5a. What is the tagline for Philadelphia's gay-friendly ad campaign?
- \_\_\_\_\_
5. Have you ever seen the ad below or another similar ad from Philadelphia?

Ad 1: Betsy Ross



Ad 2: We Your People



Ad 3: With Love



- a. Betsy Ross ad
  - Yes
  - No
  - I'm not sure
- b. We Your People ad
  - Yes
  - No
  - I'm not sure
- c. With Love ad
  - Yes
  - No
  - I'm not sure

5d. Which of the ads below do you like the most? Please select one ad, and write a word or two below the ad that captures why you chose it over the others.

- Betsy Ross \_\_\_\_\_
- We Your People \_\_\_\_\_
- With Love \_\_\_\_\_

6. What type of hotel accommodations did you stay at during your most recent overnight visit to the Philadelphia region?

- Luxury Hotel
- Mid-priced Hotel
- Budget Hotel
- Boutique or Independent Hotel
- Condo or Home Rental
- Did not stay overnight

7. Taking hotel price out of the determining factors, which of the following factors would influence you to choose one hotel over another? Check all that apply.

- Free offerings (Internet access, breakfast, parking)
- Membership with a hotel rewards program
- IGLTA or TAG approved affiliation
- Proximity to gay bars & restaurants
- Gay owned and operated
- Hotel brand reputation and outreach (gay-friendly information on hotel website, advertising)
- Affiliation with LGBT causes
- None of these

8. How many nights did you spend in the Philadelphia area on your most recent overnight visit?

- 0 (day trip)
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8-14
- 15-21
- 22 or more

9. What was the average room rate (per night) at the paid accommodations at which you stayed on your most recent overnight visit to the Philadelphia region?

- Less than \$75 per night
- \$75 to \$99 per night
- \$100 to \$149 per night
- \$150 to \$249 per night
- \$250 to \$350 per night
- More than \$350 per night
- Did not stay in paid accommodations
- Don't know/refused

10. Please indicate how much you spent for dining, drinking, shopping and other expenses (cultural performances, attractions, transportation around town, etc.) during your most recent overnight visit to Philadelphia. This is the entire amount you spent for the duration of your time in Philadelphia, whether you were there for one night or spent a week.

	Amount Spent On:			
	<u>Dining</u>	<u>Drinking</u>	<u>Shopping</u>	<u>Other Expenses</u>
• Less than \$50	—	—	—	—
• \$50-99	—	—	—	—
• \$100-199	—	—	—	—
• \$200-299	—	—	—	—
• \$300 and over	—	—	—	—
• Don't know/refused	—	—	—	—

11. We would like to offer you one chance at receiving a \$250 payment by check from Community Marketing, Inc. as an incentive for having completed this survey. Alternatively, the winner of the drawing can choose a Southwest Airlines voucher good for travel to any of its domestic destinations (restrictions apply, of course).

If you would like to enter the random drawing, please provide your e-mail address below. Your e-mail address will not be shared with anyone, and you will not be added to any list.

12. And finally, please indicate your year of birth.



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