Visitphilly.com
Hotel Visitor Surveys

Winter 2010-2011

Background

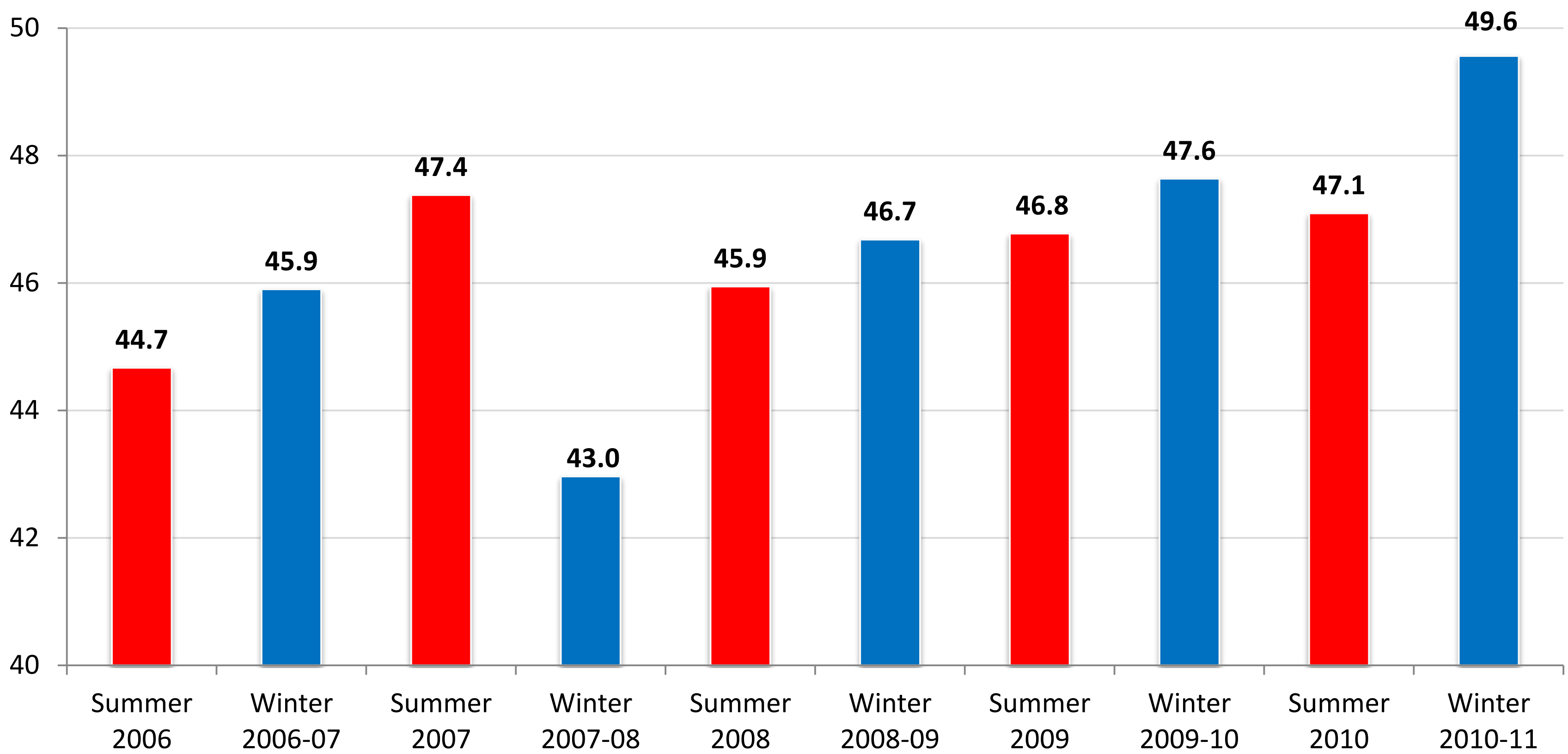
- The survey covers visitphilly.com hotel bookings from October 2010 to April 2011
  - 1,741 hotel reservations made on visitphilly.com for 3,008 room nights and $482,484 in hotel revenues
  - ADR on visitphilly.com was $160 during the time period, slightly higher than the $151 ADR for Center City overall reported by Smith Travel Research for the same months
- In most instances comparisons are made to hotel surveys from previous years
  - Those labeled "winter" cover bookings between October and April Those labeled "summer" cover bookings between Memorial Day and Labor Day
- 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 winter hotel visitors who booked their stay through visitphilly.com at the close of the season
- A total of 1,521 invitations were sent out, with 287 completes for a response rate of 19%
- As an incentive, respondents were offered a two-night stay at the Omni Hotel at Independence Park 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 13th consecutive season that GPTMC has conducted a survey of hotel visitors, with a total sample over 6,700

Average Age

- The group surveyed this season was the oldest in the history of the visitphilly.com hotel visitor surveys



Source: visitphilly.com hotel visitor surveys

Geography of Visitors

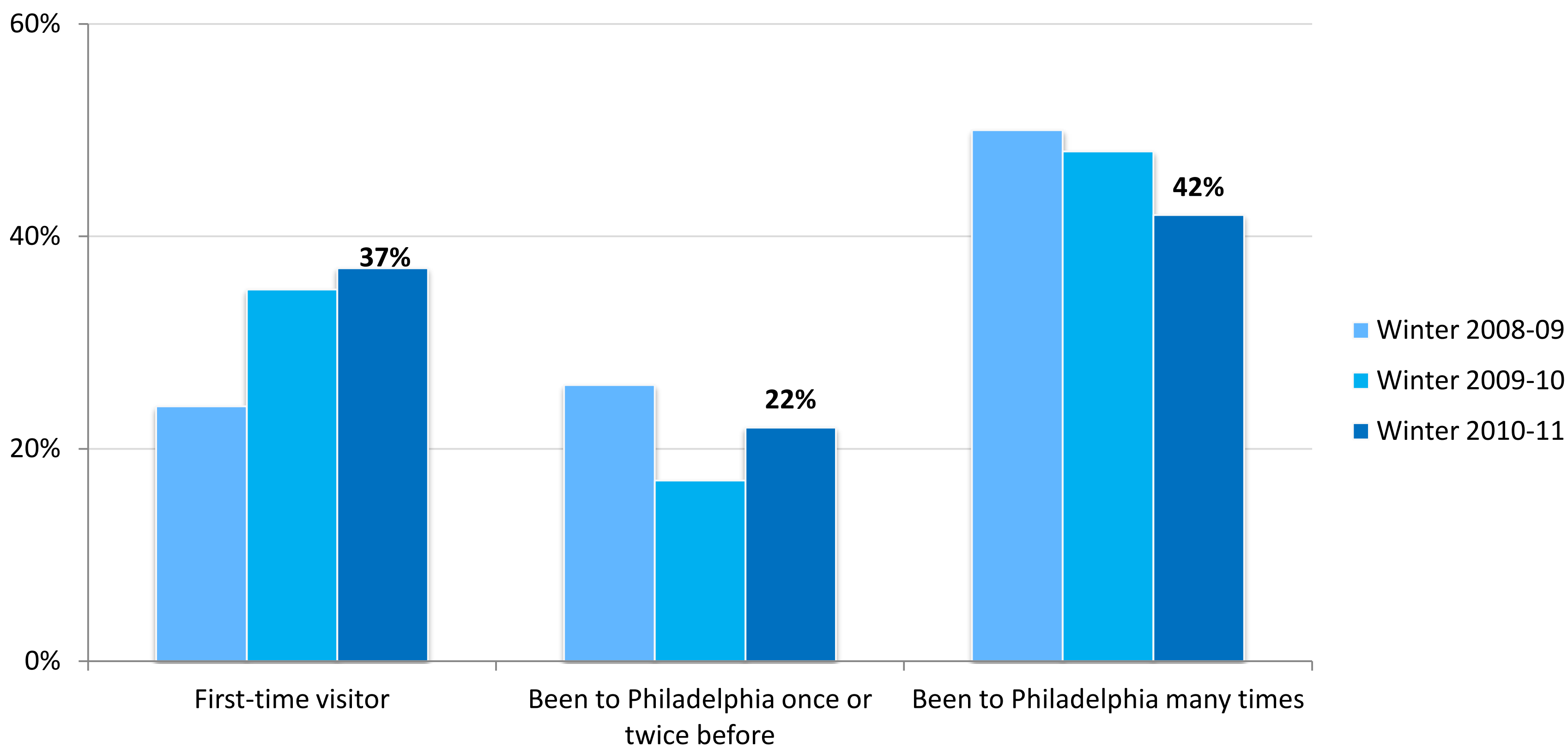
- Geography was similar to previous winters, with more visitors coming from close in than in the summer months
  - In Summer 2010, 42% of the bookings were from “other markets.”

DMA	Winter 2006	Winter 2007	Winter 2008	Winter 2009	Winter 2010	Winter 2011
Philadelphia	36%	28%	26%	30%	28%	27%
New York	22%	24%	24%	24%	24%	24%
Washington D.C.	6%	11%	8%	7%	7%	8%
Harrisburg	10%	10%	7%	7%	9%	7%
Baltimore	3%	4%	4%	3%	3%	4%
Boston	2%	2%	3%	3%	1%	3%
Other Markets	21%	22%	30%	25%	28%	26%

Source: World Choice Travel, Jan-Mar

Visitor Type

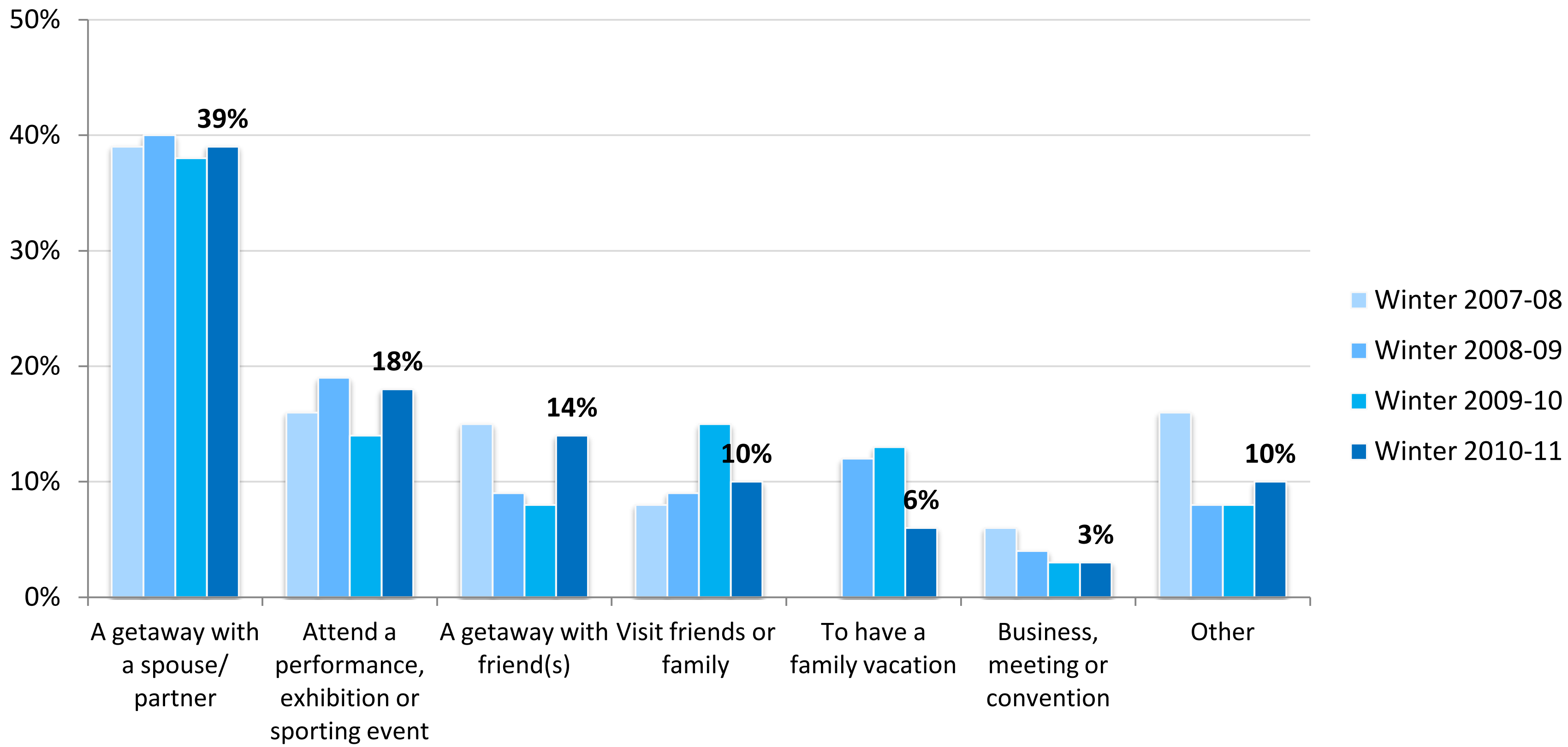
- There has been an increase in first-time visitors each of the past two winters



Source: visitphilly.com hotel visitor surveys

Reason For Visit

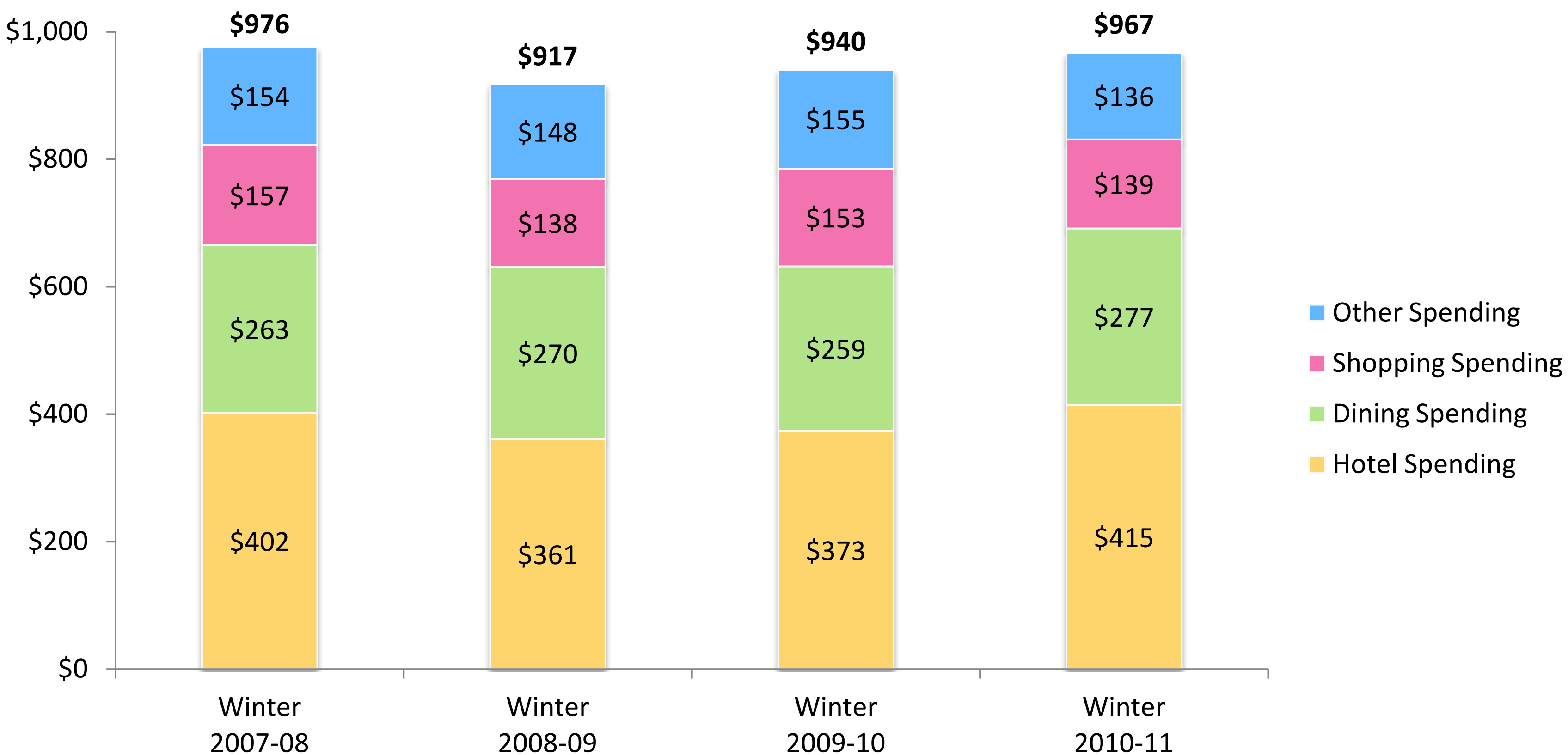
- *Getaways with friends* increased this winter to pre-recession levels.
- Family vacations are low in winter months. During the summer season around 30% of visits are made of family vacations.



Source: visitphilly.com hotel visitor surveys

Hotel Visitor Spending

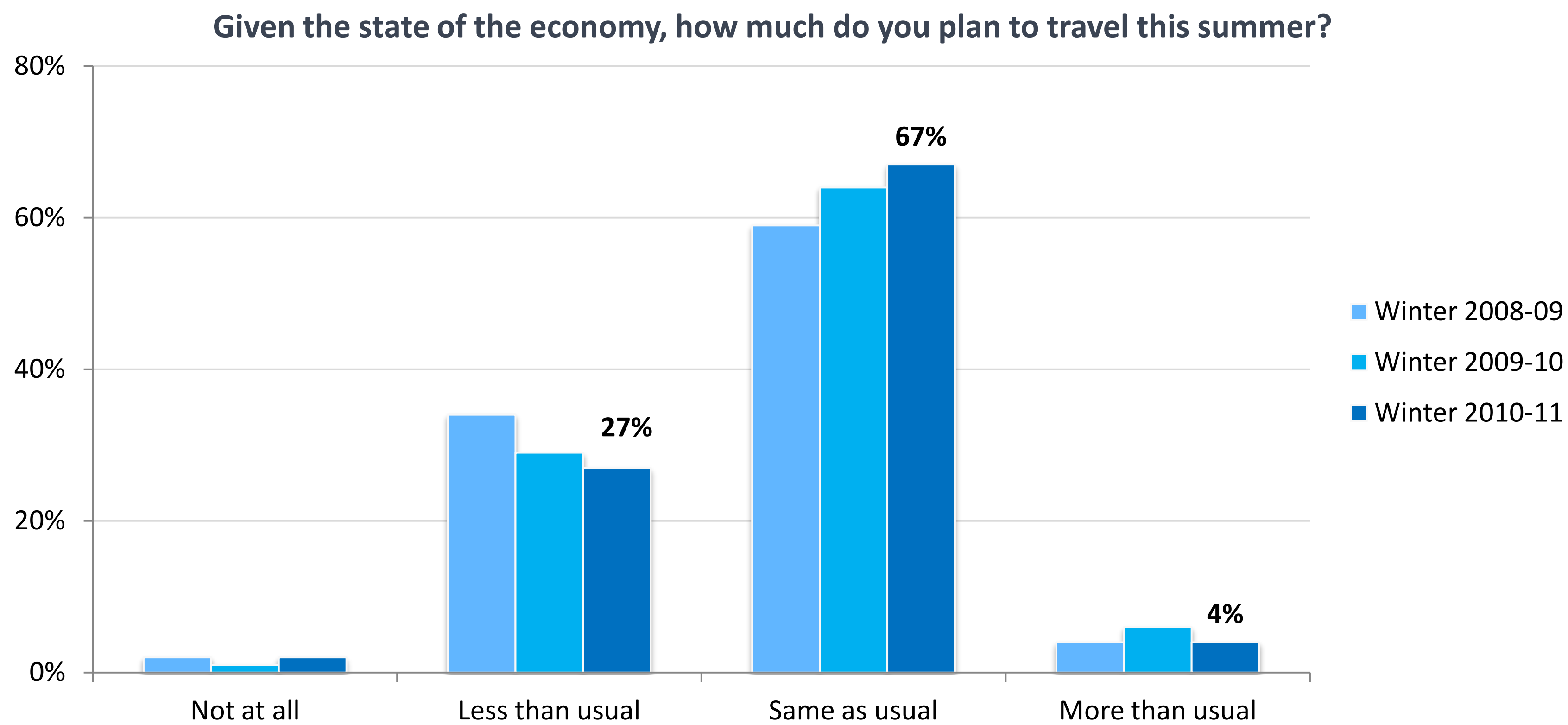
- Hotel and dining spending increased this winter, bringing total spending near pre-recession levels
  - Spending on discretionary items like shopping and entertainment remained low



Source: visitphilly.com hotel visitor surveys
Spending is calculated per travel party per two night stay

Impact of Economy on Summer Plans

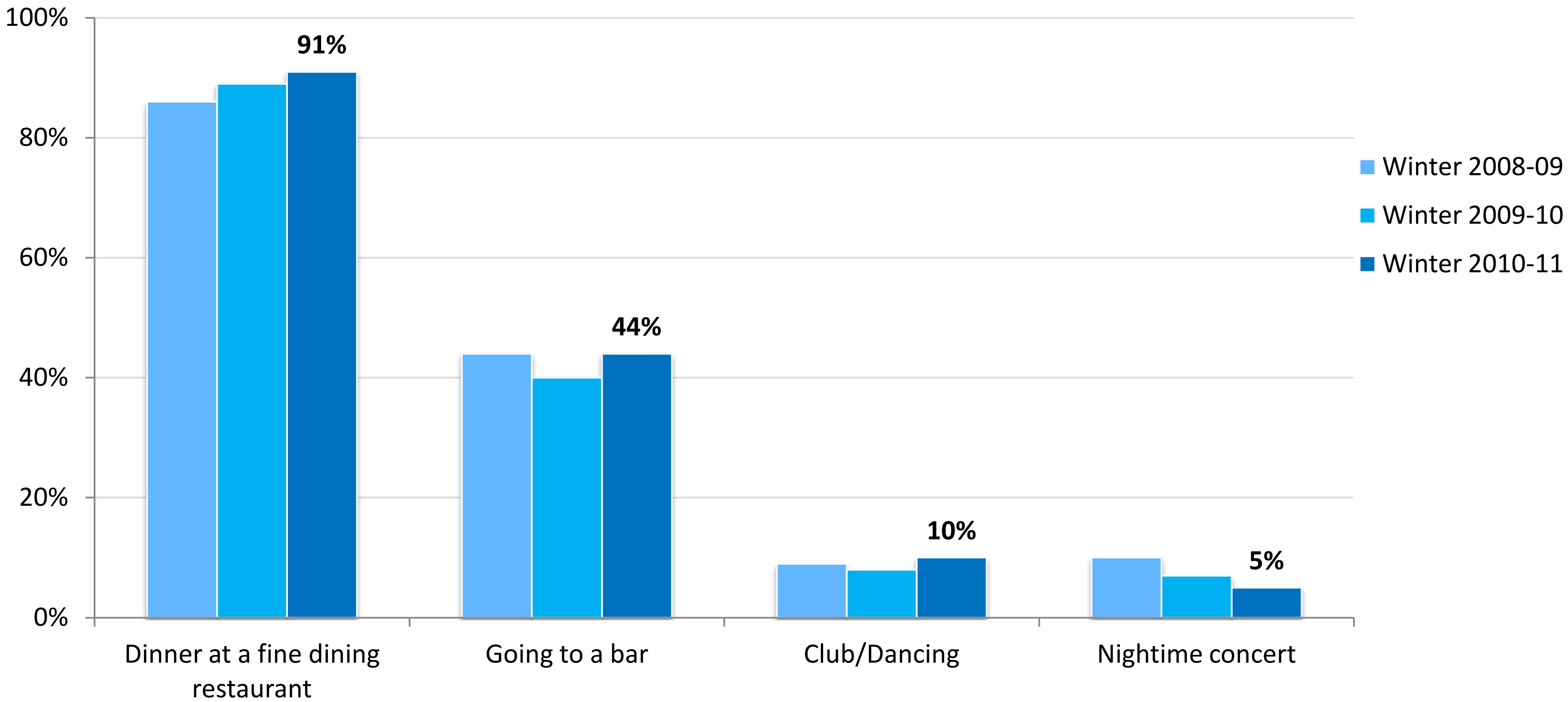
- Over the past two winters, respondents have indicated that the economy has been affecting summer vacation plans less and less



Q: Given the state of the economy, how much do you plan to travel this summer?
Source: visitphilly.com hotel visitor surveys

Nighttime Activities

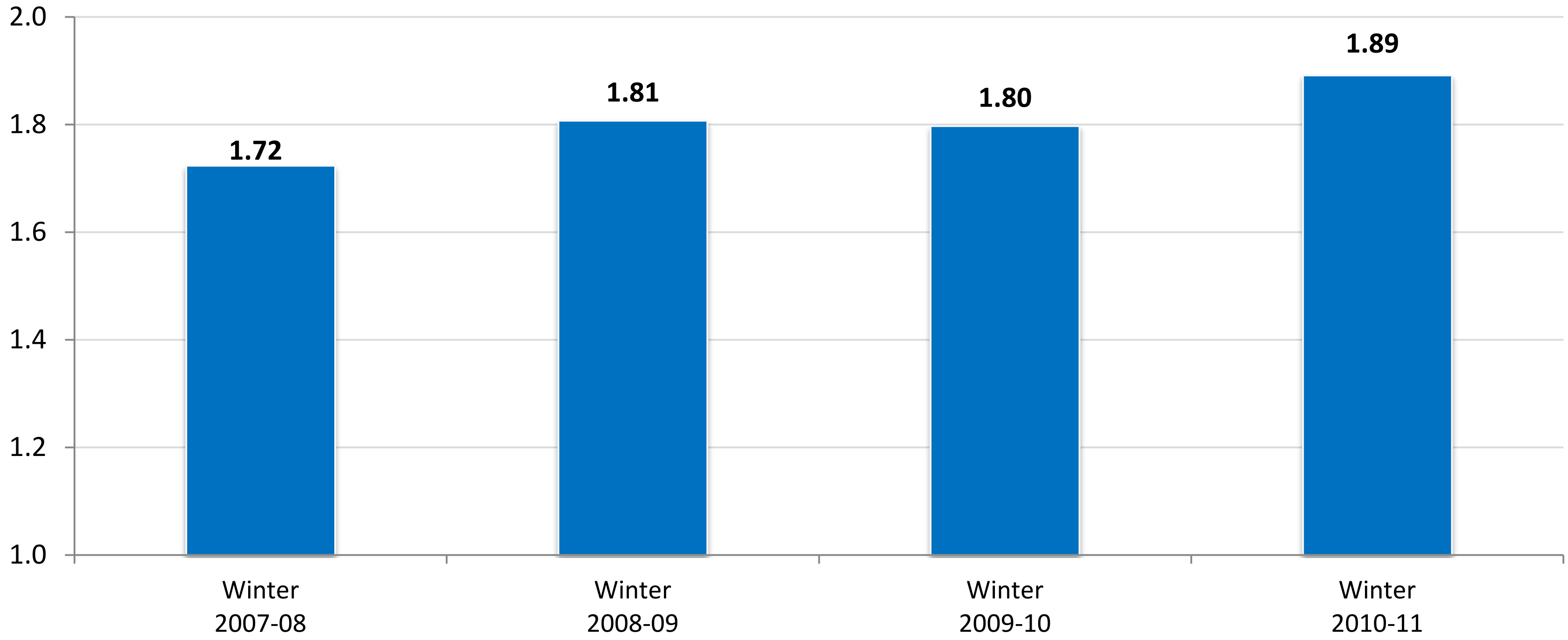
- *Dinner at a fine dining restaurant* has become increasingly popular among winter hotel visitors



Source: visitphilly.com hotel visitor surveys

Length of Trip (nights)

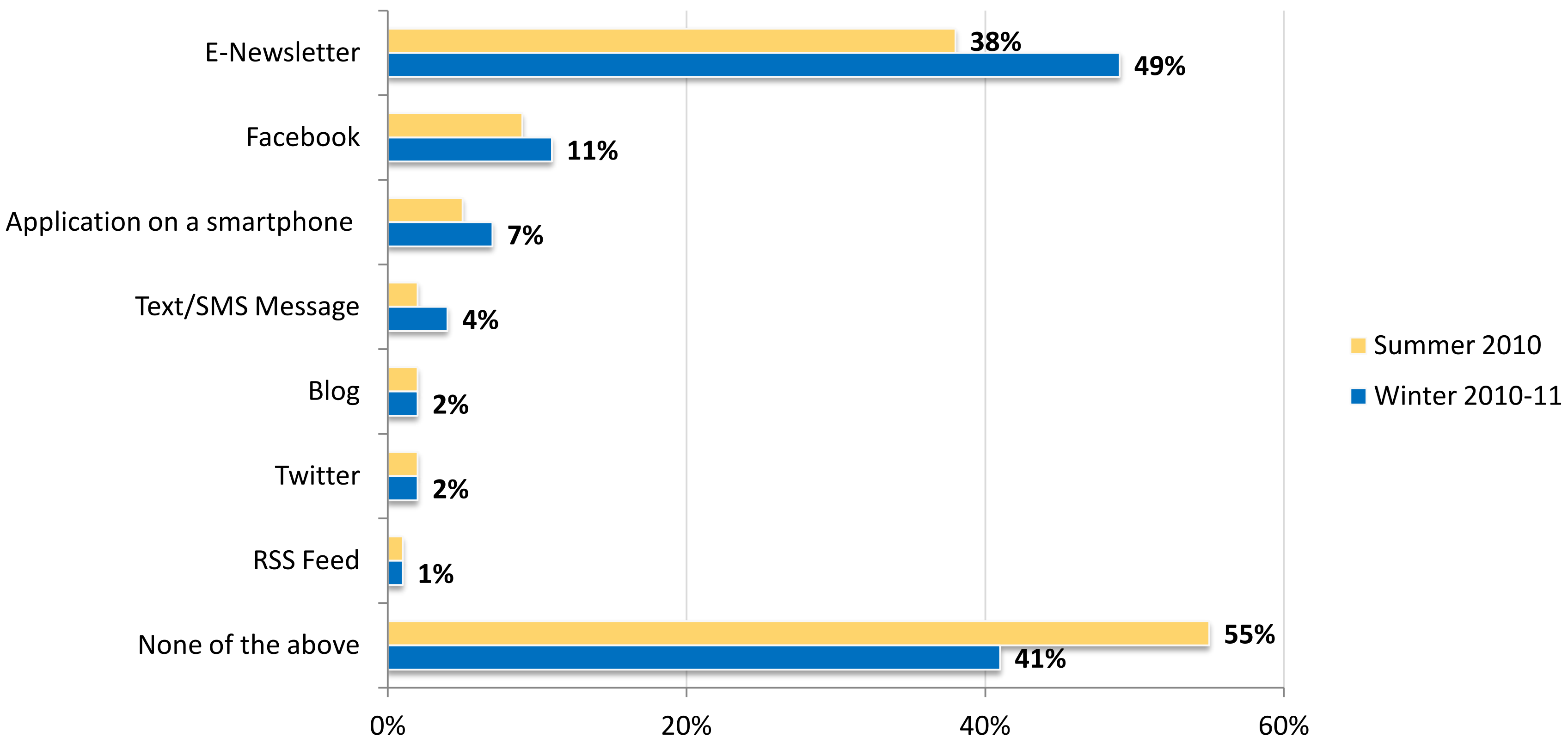
- Length of stay among winter visitors to Philadelphia has been increasing
- Over the past 6 years, summer visits tend to be longer than winter trips
  - Average trip length: summer: 1.94 nights, winter: 1.82 nights



Source: visitphilly.com hotel visitor surveys

Interest in Receiving Travel Information via New Media Channels

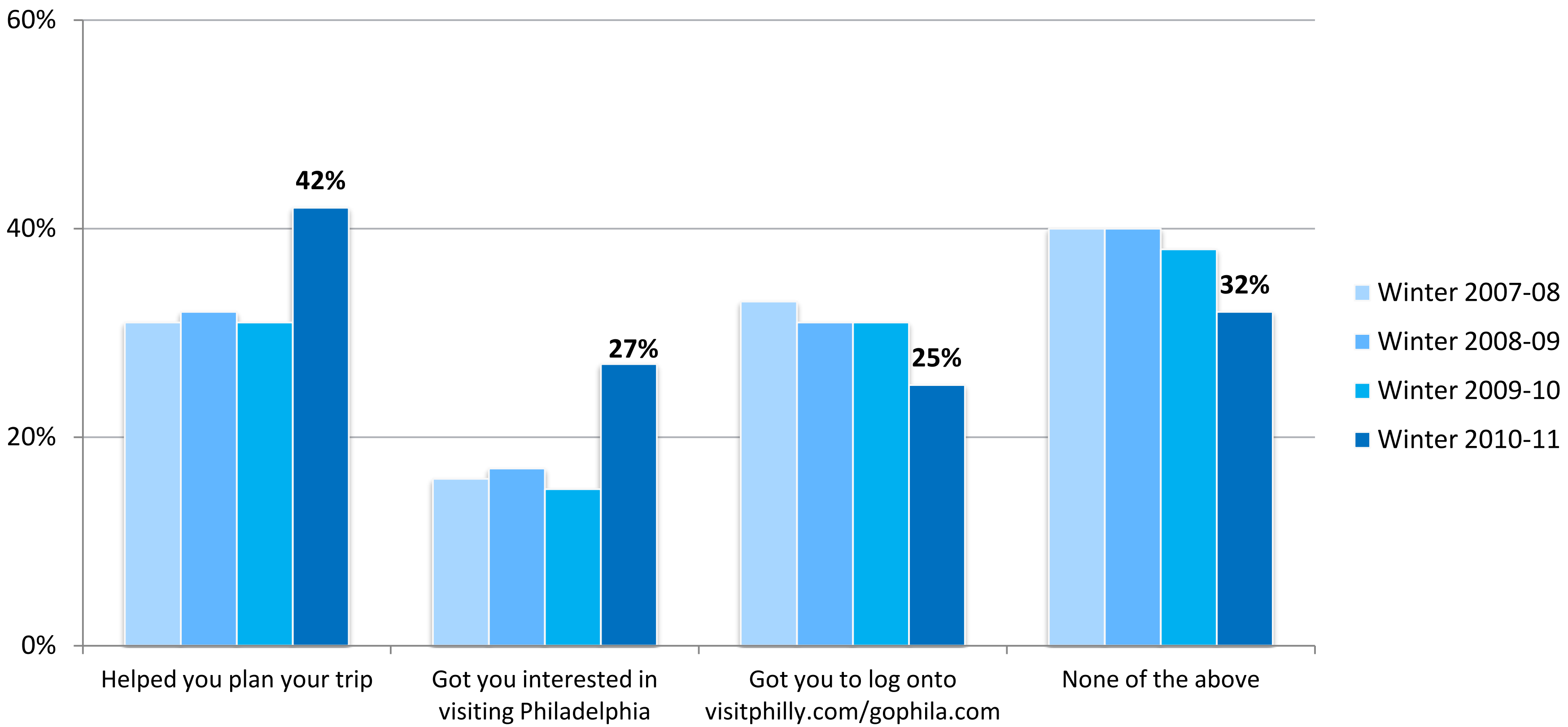
- Respondents this winter were more receptive to receiving travel info
  - Mobile device receptivity grew, as seen through apps and text messages



Q: Would you be interested in receiving travel information from visitphilly.com in any of the following formats? Select all that apply.
Source: visitphilly.com hotel visitor surveys

Impact of Articles

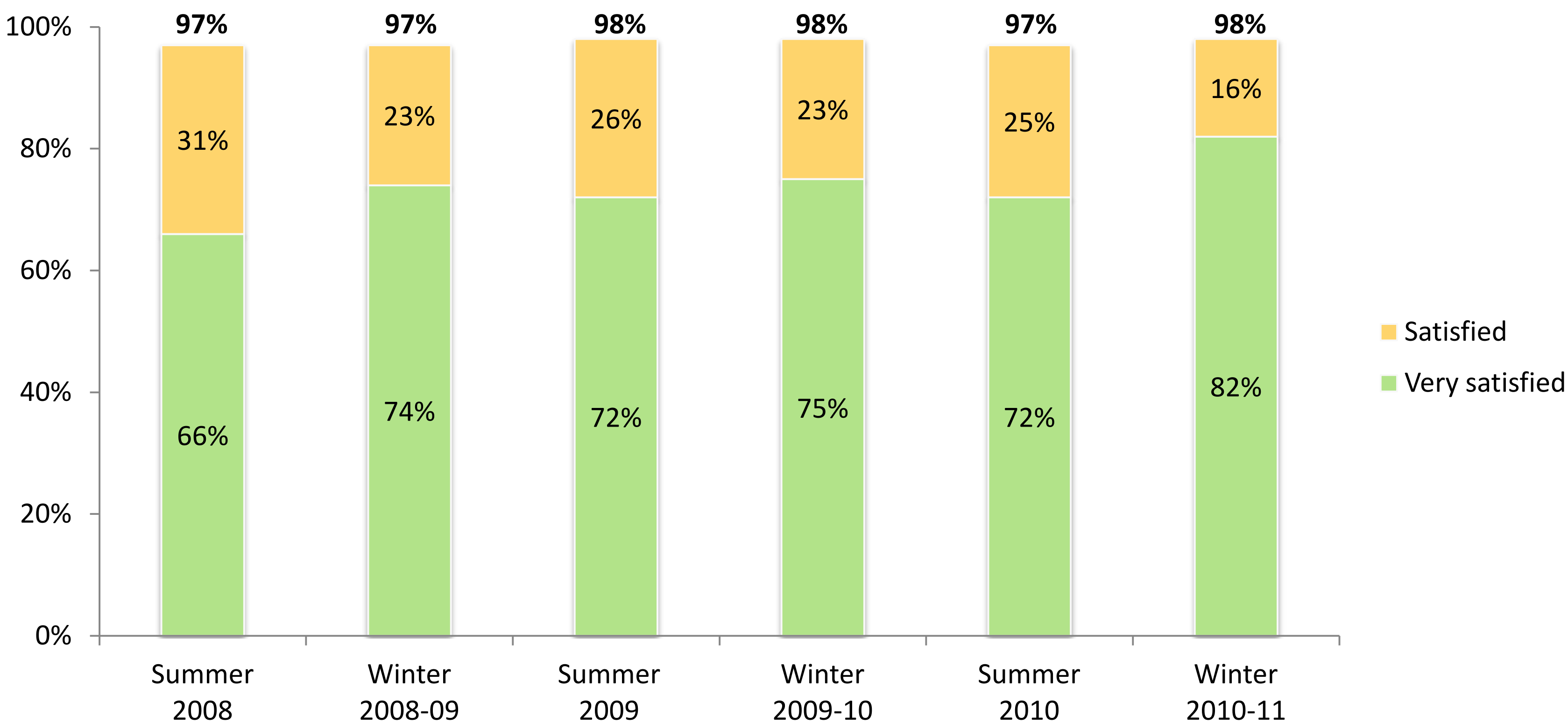
- More than ever before, articles were credited this past winter with helping respondents become interested in visiting, and in planning their trips



Source: visitphilly.com hotel visitor surveys

Satisfaction With Philadelphia Trip

- Across all seasons, nearly all respondents were satisfied with their trips
- Winter 2011 showed the highest group of “very satisfied” visitors



Source: visitphilly.com hotel visitor surveys

Key Takeaways

- Small but positive signs on the impact of the economy
  - Increased visitor spending, increased length of stay, increased intent to travel this summer
- Key differences remain between summer and winter visitors
  - Geography, purpose of visit, length of stay
- Variety of sources for information
  - Greater impact from articles, more interest in staying in touch (e-newsletter, Facebook, mobile)
- Baby boomer market may be increasing in importance
  - Average age of visitors this winter was 49.6