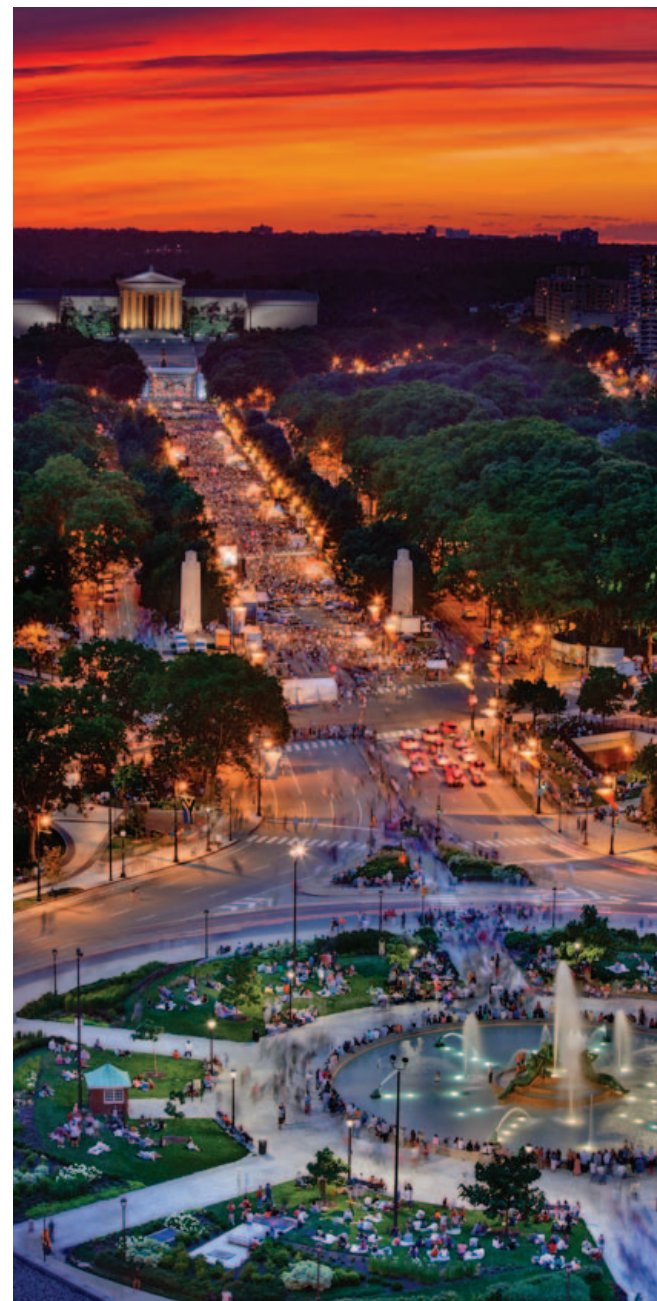


Tourism 2010: Report to the Region

WORTH THE TRIP

*Greater Philadelphia Tourism Marketing Corporation (GPTMC)
makes Philadelphia and The Countryside® a premier destination through marketing
and image building that increases business and promotes the region's vitality.*



30 S. 17th Street, Suite 1710, Philadelphia, PA, (215) 599-0776, visitphilly.com
Bucks • Chester • Delaware • Montgomery • Philadelphia Counties



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Board of Directors
 From top to bottom: Agnes Ogletree, Nicholas DeBenedictis, Melanie Johnson, James Kenney; group photo from top left: David Benton, Robert Asher, Marsha Perelman, John Estey, Jonathan Newman, Nelson Diaz; from bottom left: Julie Coker, Rhonda Cohen, Meryl Levitz, Manuel Stamatakis, Robert Bogle (not pictured: Mayor Michael Nutter, Governor Edward Rendell and Fred Shabel)

Cover photos: Philadelphia skyline; Benjamin Franklin Parkway and Philadelphia Museum of Art on July 4, 2009; and Longwood Gardens

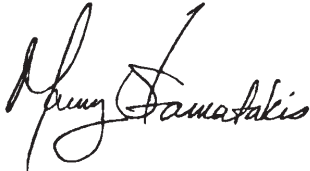
Photos by M. Edlow, J. Holder, M. Kennedy, R. Kennedy, B. Krist and G. Widman for GPTMC; also courtesy of J. McWilliams for PCVB, Andy Shenk for the Philadelphia Phillies and E.A. Kennedy, III.

Executive Message

Henry Ford once said, “A man who stops advertising to save money is like a man who stops the clock to save time.” We couldn’t agree more. In fact, we at GPTMC believe that to pull back on any of our major marketing communications programs in these challenging economic times would be a big mistake. That’s why we’re committed not just to advertising, but to an aggressive public relations push, a strong Web presence and an ahead-of-the curve social media outreach in all of the campaigns we do.

And while everything we do here is thoughtful and strategic, we strive to ensure that each of our campaigns is focused on people—not only on a market, not only on a demographic, not only on a segment. The fact is tourism and hospitality is a people business, and we know that people always want to be somewhere else. That’s the lure of travel. It’s our job to make sure they know they’re always welcome in **Philadelphia and The Countryside**® and the many, many reasons it’s worth the trip.

Sincerely,



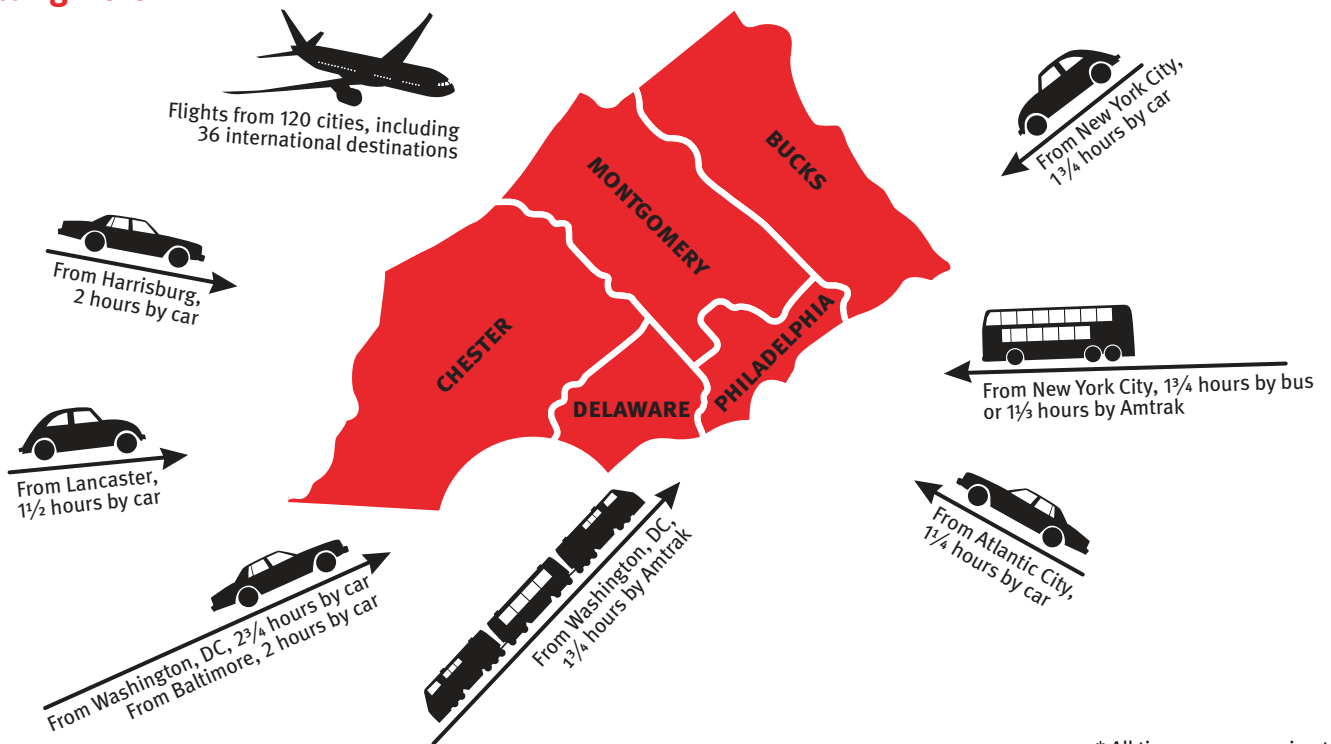
Manny Stamatakis
Chairman
GPTMC Board of Directors



Meryl Levitz
President and CEO
GPTMC



Getting Here*



* All times are approximate.

A Word About Our Sponsors

Thanks to KYW Newsradio, PNC Bank and *Where*® Philadelphia for helping to make our annual report and our annual Hospitality Leaders Luncheon possible.



A Letter From Our Governor

Tourism is Pennsylvania's second-largest industry, with Greater Philadelphia accounting for nearly one-third of the total economic impact. Ensuring the city is able to compete aggressively for visitors is especially important, and that's where GPTMC's efforts have proven invaluable.

Greater Philadelphia now welcomes 36 million visitors a year, up from 27 million in 1997 when the group first began its advertising efforts. These visitors are pumping \$8.2 billion annually into the region—a point that underscores just how important GPTMC's work is to maintaining a vibrant economy.

Sincerely,



Edward G. Rendell
Governor
Commonwealth of Pennsylvania



A Letter From Our Deputy Secretary for Tourism

The Pennsylvania Tourism Office is fortunate to have a creative and enterprising partner in GPTMC as we work to make sure that **Philadelphia and The Countryside®** is on everyone's must-do list. They've exceeded all expectations by sharing with the world a million reasons to love and visit the Philadelphia region.

Sincerely,



J. Mickey Rowley
Deputy Secretary for Tourism
Pennsylvania Department of
Community and
Economic Development



With our annual report, we're proud to debut our new corporate logo—a modern, stand-out mark that conveys GPTMC's collaborative, can-do spirit. The open circle that encloses the "gp" (Greater Philadelphia) symbolizes both the region we promote and the open way we work with our many partners. Look for this vibrant new symbol on all kinds of marketing materials as we continue to make our mark on the region.

DEAR PHILLY FAN,

AS YOU KNOW, I'VE BEEN WRITING LOVE LETTERS TO ALL MY FRIENDS AND SOON-TO-BE-FRIENDS FOR A WHILE NOW. MY PALS FROM HOME FEEL THE LOVE AND HAVE WRITTEN BACK TO ME. CHECK OUT LETTERS FROM SOME OF THE REGION'S NEWEST AND COOLEST TOURISM AND HOSPITALITY LEADERS THROUGHOUT THE REPORT.



A Letter From Our Mayor

As Philadelphia's chief cheerleader, GPTMC has rallied hard to enhance people's perceptions of the city, and it's working. Even though consumers are cutting back, their desire to travel remains strong, and they are increasingly discovering that Philadelphia is worth the trip—not once, but again and again and again.

Sincerely,



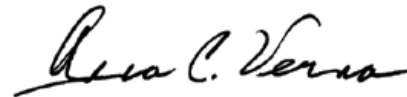
Michael A. Nutter
Mayor
City of Philadelphia



A Letter From Our City Council President

People come to Philadelphia for many reasons: rich cultural opportunities, exhilarating sporting events and inspiring historical experiences. If you're a fan of Philadelphia like I am, keep spreading the love and invite your friends and family to visit our wonderful city soon.

Sincerely,



Anna C. Verna
City Council President
City of Philadelphia



Philadelphia City Council

From left to right: Frank Rizzo, Bill Green, William K. Greenlee, Maria D. Quiñones-Sánchez, Joan L. Krajewski, Donna Reed Miller, Brian J. O'Neill, Anna C. Verna (council president), Darrell Clarke, Marian B. Tasco, Jannie L. Blackwell, Blondell Reynolds Brown, Frank DiCicco, W. Wilson Goode, Jr. and Curtis Jones, Jr. (not pictured: Jack Kelly and James Kenney)

Dear Philadelphia,
What I love most about you is how I can really be myself around you. I can go from being a Girl Scout by day, hiking deep into Fairmount Park, to being a diva at night in my new gown for a concert and ball on the Avenue of the Arts.

With Love,

Jeri Lynne Johnson, founder and music director, Black Pearl Chamber Orchestra

XOXO



GPTMC's Guiding Principles

"Of course, there will be winners and losers. Those destinations favored by close proximity to major population centers, adept at understanding the consumer and having the wherewithal to market and promote effectively could well outperform the overall market." – Dr. Suzanne Cook, senior vice president, research, U.S. Travel Association

Most people think that GPTMC stands for Greater Philadelphia Tourism Marketing Corporation, and it does. But those letters also stand for Growth, Partnerships, Trends, Marketing and Customers—words that guide our work and keep us focused on fulfilling our mission.

G { **Growth:** This past year was a difficult one in terms of the economy, but there are so many reasons to be optimistic about tourism in Philadelphia—and how much it has grown over the years. Since 1997 when GPTMC began advertising, leisure room nights in Center City have increased 189%. And over the past two decades, both room supply and room demand in Center City have increased **twice as fast as the national average**. That's momentum we can believe in! (See pages 14-15 for more.)

P { **Partnerships:** Now more than ever, we rely on our stakeholders to help us extend our message to audiences we wouldn't be able to reach on our own. Not only do we collaborate with our dedicated partners in the tourism and hospitality industry—hotels, transportation providers, restaurants, attractions, shops and others—but we also work closely with those in the business world—banks, media outlets, advertising agencies and research companies. Together, we build community, boost tourism and benefit the economy. (See page 22-23 for more.)

T { **Trends:** Doing our job well means staying at the forefront of tourism, media and marketing trends. When social media began its rise, we jumped in the mix with our **uwishunu.com** blog. Today, we have a powerhouse of social media properties, and our industry peers view us as leaders in the field. We've also been quick to adapt to changes in the rapidly evolving media world, focusing our media buy on less expensive, more targeted online ads and conducting more intimate, single-topic press events for journalists with little time to spare. And despite the difficulty the travel industry has faced recently, we know that certain groups are still willing to vacation, which is why we're focusing our marketing efforts largely on these people. (See pages 12-13 for more.)

M { **Marketing:** Marketing is what we do, and we've always taken an integrated approach to selling our great region to potential visitors. While advertising is a great vehicle for us, it's even better when combined with public relations, a strong Web presence and social media. That's why *all* of our departments work on *all* of our campaigns to ensure that our message is heard loudly and repeatedly in *all* of the places our consumers may be listening. (See pages 16-19 for more.)

C { **Customers:** Since GPTMC started doing business, we've always put our customers first. We do everything we can to make planning a trip to the region easy. In fact, our beloved **visitphilly.com** is a one-stop site for all Philly trip-planning needs—money-saving hotel packages, car rentals, airline reservations, attraction tickets and more. Of course, we also work with all of our tourism stakeholders to ensure that visitors have a positive Philadelphia experience once they actually make the trip.

GPTMC: The Basics

What We Mean by Philadelphia

We mean Greater Philadelphia, including Bucks, Chester, Delaware, Montgomery and Philadelphia counties.

What We Do and How We Do It

GPTMC makes **Philadelphia and The Countryside**® a premier destination through marketing and image building that increases business and promotes the region's vitality. Our advertising, communications, Web, cultural tourism, special projects and research departments work together to ensure that Philadelphia is top-of-mind for those planning a leisure vacation, a weekend or a getaway. Once a visitor decides to make the trip, we do our best to make sure that the planning process is easy and that our destination delivers.

Here's a look at what tourism marketing means to us:

- Advertising in print, television, radio, outdoor and online
- Brand development
- Consumer collateral materials
- Consumer and media relations
- Cooperative advertising
- Cultural tourism marketing
- Event-based marketing
- visitphilly.com, visitphilly.com/pressroom and uwishunu.com
- Hotel packaging
- Image building
- Partnerships, promotions and marketing alliances
- Social media relations
- Stakeholder relations
- Tourism development
- Visitor and marketing research

Five Philly Page-Turners

Every day, GPTMC plays the role of exuberant cheerleader for **Philadelphia and The Countryside**®. In addition to all of our advertising, communications, online assets, social media and other efforts, GPTMC produced five major publications over the past year to spread our story in fun and engaging ways. The best part: They're all available for free on visitphilly.com.

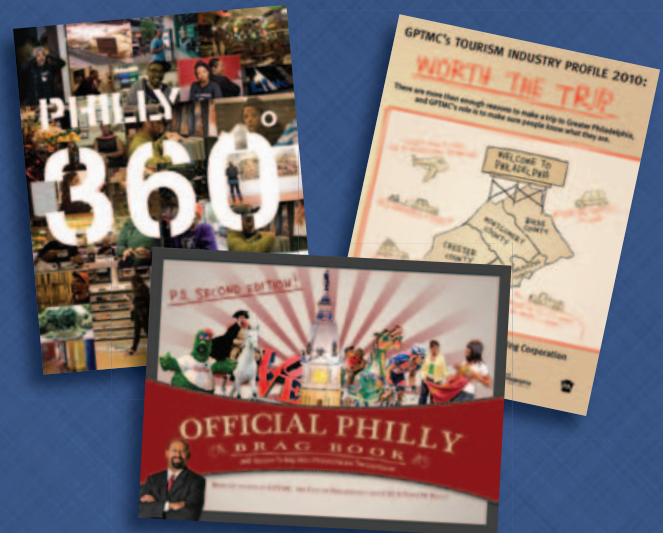
1. Philly 360®, **The Book**: Philly's most prominent trendsetters, the **Philly 360**® Creative Ambassadors, dish on their Philly faves. visitphilly.com/philly360

2. Official Philly Brag Book: With the City of Philadelphia and CBS 3, GPTMC created the second edition of the *Brag Book*, which lists 200 facts that make Philadelphians so proud. visitphilly.com/bragbook

3. GPTMC's Tourism Industry Profile 2010: Worth the Trip: There are hundreds of reasons people keep coming to Greater Philadelphia. It's worth the trip—even in a tough economy. visitphilly.com/research

4. Tourism Timeline: Readers take a trip down memory lane—and get a glimpse of Philly's future growth—when they skim Greater Philadelphia's major tourism milestones since 1985. visitphilly.com/research

5. Tourism 2010: Report to the Region: You're reading it! Keep going to discover more about the region's leisure tourism industry and GPTMC's work. visitphilly.com/research



Our Brand Promise

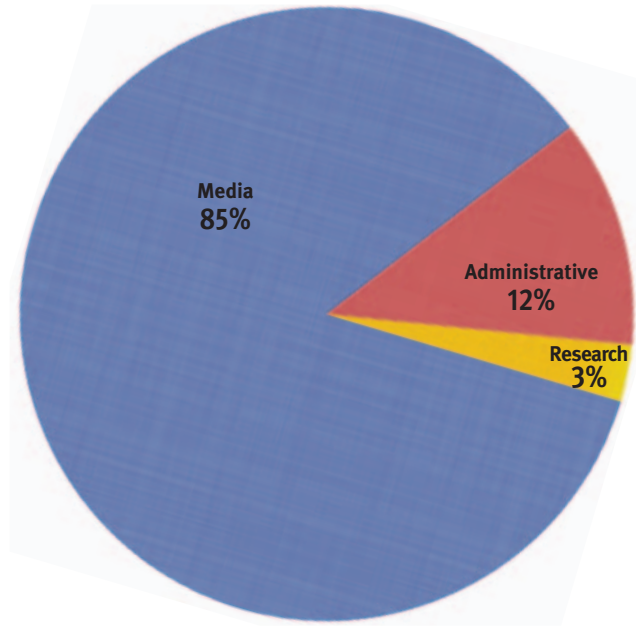
As Philadelphia's brand ambassadors, GPTMC aims to make the region's image so strong, so positive and so motivating that people just can't stay away. When marketing Greater Philadelphia to potential visitors, we sell "Philadelphia" and "Independence"—a promise that is derived from these five brand components:

- **Authenticity:** In Philadelphia, everything is real, from the Liberty Bell and Independence Hall to our locally owned boutiques, BYOBs and galleries.
- **History:** We embrace the meaning of Philadelphia's history—liberty, democracy and independence—when we invite visitors to see our historical icons.
- **Accessibility:** With so much to do, a wide range of price points and a central location, accessibility is a real competitive strength for Greater Philadelphia.
- **Fun:** Philly satisfies consumers' perennial desire for fun, and here it comes in the way of music, food, sports, museums, shops, gardens, galleries and more.
- **Discovery:** So much of what Philadelphia offers are the unexpected moments and the little gems uncovered while exploring the city's neighborhoods and the countryside's towns.

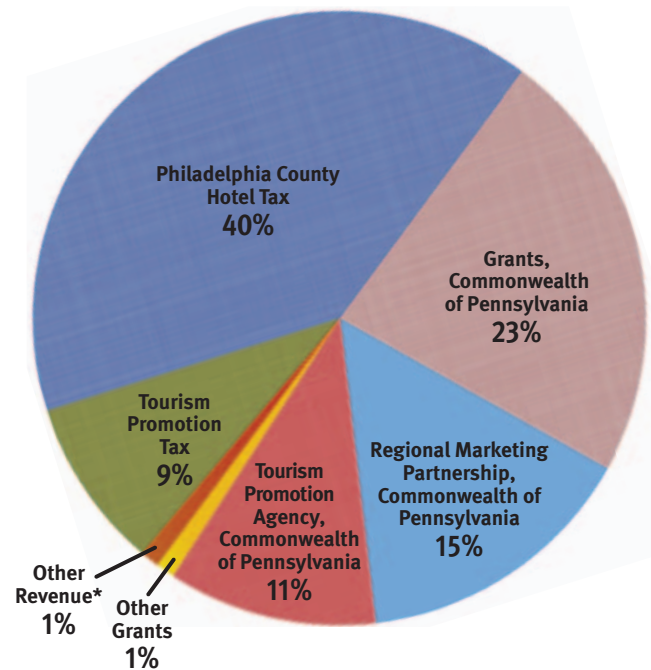
Our Funding Sources

- Philadelphia County Hotel Tax
- Tourism Promotion Tax
- Commonwealth of Pennsylvania
- Delaware River Port Authority
- William Penn Foundation
- Delaware Valley Regional Planning Commission

Fiscal Year 2009 Expenditure Allocations



Fiscal Year 2009 Funding Sources



* "Other Revenue" consists of a cooperative advertising initiative, commissions and corporate sponsorships. GPTMC has identified programmatic needs and has taken a strategic approach toward the development of these additional funding sources in order to enhance and grow marketing programs in quality and effectiveness.



Dear Philadelphia,
 What I love most about you is how you are everything that is this great nation.
 With Love,
David R. Brigham, president and CEO, Pennsylvania Academy of the Fine Arts
XOXO

What We Want You to Know About Tourism

1. The Philadelphia region welcomed **36 million** domestic visitors in 2009, totalling **417 million** since 1997, when GPTMC placed its first ad. (Tourism Economics, Longwoods International)
2. Philadelphia tourism has momentum. The strong growth of visitation was slowed temporarily only by the 9/11 terrorist attacks and the current economic recession. Visitation to Greater Philadelphia has been on the rise since 1997, increasing by **9.4 million** day and overnight visitors. (Tourism Economics, Longwoods International)
3. Most visitors to Greater Philadelphia are here to have fun— more than **80%** of domestic day and overnight visitors in 2009 came for a leisure purpose. More than **11 million** leisure visitors stayed overnight in 2009; since 1997, **129 million** have slept over. (Tourism Economics, Longwoods International)
4. Leisure travelers filled **735,000** hotel rooms in downtown Philadelphia in 2009, up **189%** from 254,000 in 1997. (PKF Consulting)
5. For the sixth straight year, Saturday night was the busiest night of the week in Center City, with hotel occupancy at **81%** (higher than Boston, Washington, DC and Baltimore). This represents a shift in people's image of the city: It's not just for a business trip or a pilgrimage to the Liberty Bell; it's a vacation. (Smith Travel Research)
6. GPTMC works every day to tell the Philadelphia story. In 2009, we generated **501 million** advertising impressions and **4,100** destination stories with national and international reach in print, on radio, on television and online. Visitors went to our Web sites **visitphilly.com** and **uwishunu.com** more than **4 million** times, spending the equivalent of **11,000** days browsing content, photos and videos of Greater Philadelphia. (Mayo-Seitz Media, Cision, Google Analytics)
7. Tourism is big business. Visitor spending in Greater Philadelphia generates **\$22 million** a day in economic impact for the region—**\$8.2 billion** for the year in 2009. (Tourism Economics)
8. Tourism is an important job generator for Greater Philadelphia. Visitor spending sustained **83,664** full-time jobs in 2009; that's **5%** of all jobs in the region. (Tourism Economics)
9. Tourism marketing is a net revenue generator, not a cost to taxpayers. It doesn't compete with priority programs—it helps pay for them. In 2009, visitor spending in Greater Philadelphia generated **\$1.2 billion** in federal, state and local taxes—money that supports schools, libraries and more. (Tourism Economics)
10. Every media dollar that GPTMC spends marketing the region generates **\$185** in economic impact for the region, making the return on investment from tourism marketing immediate, continuous, significant and measurable. (Econsult)



Cira Centre

Dear Philadelphia,
What I love most about you is that you're big enough to have everything and small enough to walk everywhere.
With Love,
Tom Corcoran, president, Delaware River Waterfront Corporation
XOXO



Tourism Situation Analysis

Strengths and Opportunities

In a period that continues to be “business as unusual,” Greater Philadelphia remains a premier destination—but one that requires continued, inventive, game-changing marketing by GPTMC and its partners in order to keep the momentum going. Although 2009 was a challenging year for hotels nationwide, millions of new and returning visitors came to experience Greater Philadelphia. Here’s a look at what keeps us strong in 2010 and beyond:

- 1. Newly Named, Newly Redesigned Web Site:** Our beloved gophila.com took on a new name and a new look in 2010. Now known as **visitphilly.com**—a name that conveys exactly what we want people to do—the dramatically enhanced Web site strengthens our ability to market the region as a top visitor destination to an ever-growing online audience. The new URL and site design also complement our growing, award-winning social media properties.
- 2. A Whole Lot of Love:** Our game-changing **With Love, Philadelphia XOXO™** campaign appealed to the masses with its charm, humor and Philly attitude. Not only did locals—who play a big role in our success as a tourism destination by inviting friends and family to visit—embrace the campaign, but so did the people in our high-yield markets.
- 3. A Whole Lot to Do:** With so much to do—iconic tourist attractions, buzzed-about restaurants, not-to-be-missed museums, indie boutiques, performing arts aplenty and gardens galore—Greater Philadelphia has shed its do-it-in-a-few-hours reputation and has become a place where people want to stay over multiple nights multiple times a year.
- 4. And More on the Way:** Philadelphia continues to reinvigorate its classic attractions and build new and only-in-Philadelphia sites. Coming soon: PPL Park, President’s House Commemorative Site, Lights of Liberty, National Museum of American Jewish History, SugarHouse Casino and more.
- 5. The Cool Factor:** In recent years, Philadelphia has emerged as a gathering place for young, creative people. The artists, entrepreneurs and cultural thought leaders involved in our **Philly 360®** campaign have helped define the city in a new way for a new generation. What’s more, Philadelphia is all over pop culture: on big and small screens, in print and online.
- 6. Easy to Get Here, Easy to Get Around, Easy on the Wallet:** Within a five-hour drive of a quarter of the U.S. population, the Philadelphia region is accessible in terms of getting here and getting around, and it boasts price points that appeal to every wallet. Low-cost options like Southwest Airlines, Amtrak, BoltBus and Megabus make it easy for people all over the country to visit.
- 7. Tourism Marketing Matters:** Over the past 14 years, GPTMC has built equity for Greater Philadelphia as a premier destination and raised awareness of the region and its tourist attractions with consistently running, constantly evolving marketing messages.
- 8. Organizational Credibility:** “In a time of change for many major Philadelphia institutions, GPTMC is seen as a steady force with a long-term vision for the region,” said Suzanne Cook, U.S. Travel Association. “Their strong brand makes them a trusted partner and an important convener across all the fields that impact the tourism industry, and they’ve also established themselves as a trusted source for research among stakeholders, legislators and partners.”
- 9. Partnerships Pay:** Collaboration is key to everything we do here at GPTMC, and it’s a great way to stretch our marketing dollars. In 2010, we embarked on major partnerships with the Independence Visitor Center Corporation (unified visitor marketing), the Delaware Valley Regional Planning Commission (local food campaign) and the Kimmel Center (*Philadelphia International Festival of the Arts* promotion). Plus, we do all sorts of creative collaborations with our five convention and visitors bureaus, area media outlets, transportation providers and other hospitality industry stakeholders. (Read more about our many impactful partnerships on pages 22-23.)



Challenges and Cautions

While Philadelphia's tourism industry is better positioned than some due to our accessible location and diversity of experiences and price points, we are still operating within the most challenging climate the industry has experienced in years. The recession is forcing travelers to rethink their vacation plans. Many are trading down from expensive destinations or shortening their trips in an effort to cut back. Here's a look at the challenges we've faced over the past year and will continue to cope with moving forward:

1. Decreased Funding, Lower Hotel Room Rates and Fewer Conventions:

Decreased financial support from government sources has a significant impact on the extent to which GPTMC can market the city and region. Funding from the hotel occupancy tax, while dedicated, is also at lower-than-anticipated levels due to fewer conventions (for the time being), a drop in business travel and lower hotel room rates—a practice that has depressed hotel revenues as well.

2. Last-Minute Plans: An abundance of travel-planning tools and the proliferation of discounted rates mean travelers are waiting longer to book travel and finalizing their plans at the last minute. Our marketing tactics and materials must respond to consumer needs in real time to meet the challenges of this environment.

3. Declining Value in Airline Travel: The airline industry has undergone significant cutbacks in total flights, as carriers attempt to bring capacity in line with declining consumer demand for air travel. While Greater Philadelphia is primarily a drive destination, the struggles of the airline industry threaten our ability to reach the 20% of domestic overnight visitors who arrive here by plane each year. And with airlines frequently introducing higher rates and new fees (for checked bags and the like), consumers are more reluctant to book flights, opting for alternate modes of transportation such as train and bus travel.

4. Friendly Competition: Competition among destinations abounds because of significant travel deals, freebies and giveaways being offered. In addition, some other destinations are working with greater budgets and investments in tourism marketing.

5. Expect the Unexpected: When something unpredictable happens—crippling snow storms wallop the region several times in one winter—GPTMC is expected to react quickly and nimbly. Evolution and flexibility are key when creating marketing campaigns that must succeed when certain circumstances are beyond control.



Independence Hall

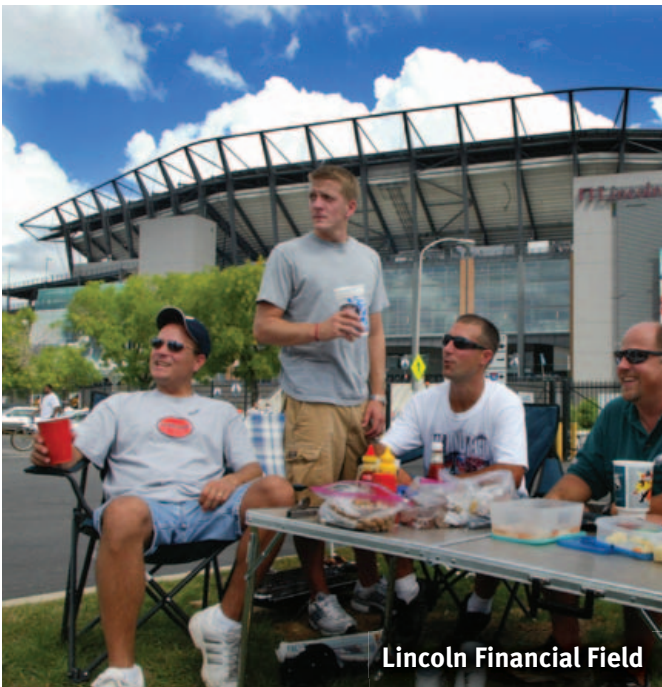
Dear Philadelphia,
What I love most about you are your extraordinary institutions of arts and culture.
With Love,
Michael Rosenzweig, president and CEO, National Museum of American Jewish History
XOXO



Travel Trends

GPTMC knows that staying on top of the latest trends affecting travel and destination marketing is essential to our business. Innovation in promoting the Philadelphia experience entails knowing what travelers want and how they get their information. Here are trends informing GPTMC's integrated marketing techniques and keeping our tactics ahead of the competition:

- 1. To Spend or Save, That Is the Question:** After years of borrowing and spending, American consumers are adjusting by increasing their savings, with extra income no longer considered "discretionary." While they still intend to travel, they will increasingly seek to stretch reduced funds dedicated to leisure.
- 2. Job Market Key to Leisure Travel:** With the unemployment rate hovering at a level not seen in 25 years, the pool of potential leisure travelers has greatly decreased—by eight million people since the recession began, in fact. New hotels and resorts opening in 2010 were conceived before the recession, leading to more players competing for shares of a smaller pie.
- 3. Government Sees the Good in Travel:** In March 2010, President Obama signed into law the Travel Promotion Act and established the Corporation for Travel Promotion, charged with reversing the decline in international visitation to the U.S. State and local governments are increasingly searching for alternative sources of funding to maintain vital tourism marketing programs at a time when budgets are stretched thin.
- 4. Tech-Savvy Travelers Speak Up and Demand More:** Modes of travel planning have shifted, as technologically savvy consumers use new platforms and demand good values. Even as the economic outlook improves, more travelers will continue to plan and book their own trips and expect a deal while doing so. Consumers also have a louder voice online, relying more on the advice of their peers and their social media networks, which allow them to "talk back" to destinations about their experiences.



Dear Philadelphia,
What I love most about you are all the fun things you offer for families to do together, like Please Touch Museum® at Memorial Hall, Fairmount Park.

With Love,
Laura H. Foster, president and CEO, Please Touch Museum®
XOXO

5. **Buses Are Back in a Big Way:** Bus service between major East Coast destinations has undergone a renaissance. Frugal meets hip aboard the BoltBus, Greyhound and Megabus lines that have endeared themselves to young travelers. Centrally located stops, clean cabins and wireless Internet capability equal convenience for short-haul travel from New York, Boston, Washington, DC and beyond.
6. **Branding Builds Business:** Since hotel room rates in top U.S. destinations will remain low in 2010, brand building will play an increasingly important role in the destination choices consumers make. As travelers are swarmed with deals and promotions, it will be the destinations with the strongest brands—not just good deals—that succeed.
7. **The News Media Shuffle:** With newspapers, network newscasts and online news sources changing rapidly, the media is forced to navigate a constantly evolving industry. Newspapers relying on subscription services have adapted by sharing content and making staff reductions, while destinations are clamoring for the attention of fewer travel writers, making successful media relationship building a necessity.
8. **It's Personal:** Travelers are looking for invitations that speak to them—their likes, their interests, their indulgences—and in today's world, there are more ways than ever to get messages to them. The days of one-size-fits-all marketing campaigns are behind us, as consumers demand to be spoken to as individuals.



Schuylkill River Trail

Top 10 Accolades

All year long, Philadelphia—along with its attractions, events, restaurants and hotels—lands on the “best” lists of national magazines, newspapers and Web sites. Here are 10 best of the best lists from 2009-2010.

1. *Real Simple* ranked Philadelphia on its list of “21 Top Time-Saving Cities” in the country.
2. *Prevention* magazine says Philly is one of the country’s “Top 10 Walking Cities.”
3. Bing.com’s “Top Destinations for 2010” featured Philadelphia among 10 U.S. and international spots.
4. Forbes.com named Philadelphia in its top 10 list of “America’s Most Entertaining Cities.”
5. *Men’s Journal* ranked the city on its list of “The Top Five Beer Towns in the U.S.”
6. Philadelphia made cnnmoney.com’s list of the “25 Best Places to Retire.”
7. According to *Travel + Leisure*, the city has some of the “Best July 4th Fireworks” around.
8. For three years running, People for the Ethical Treatment of Animals (PETA) ranked Citizens Bank Park number one on its “Top 10 Vegetarian-Friendly Ballparks.”
9. *Fast Company* included Philadelphia in its list entitled “Fast Cities 2009: The 13 Most Creative Cities in the World.”
10. The city took spot 16 on the *New York Post*’s “100 Summer Destinations.”

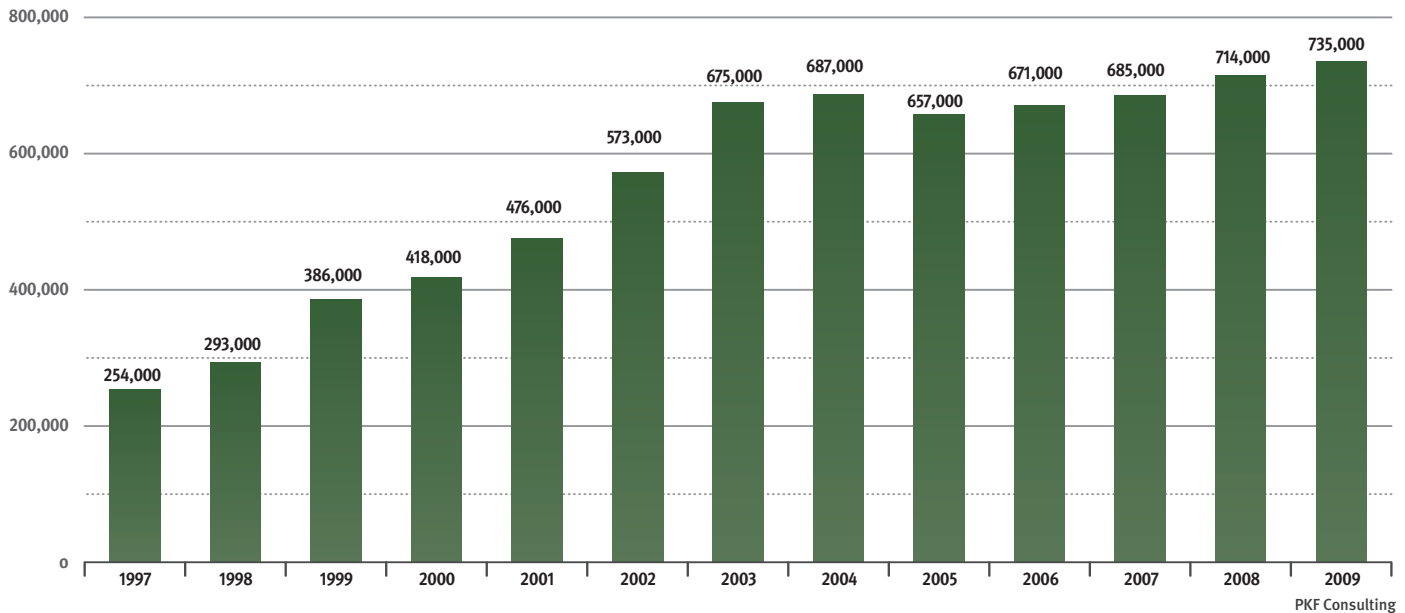
Dear Philadelphia,
 What I love most about you is your place in history and in the future.
 With Love,
Autumn J. Adkins, president, Girard College
 XOXO



Our Big Stories: Leisure Prevails

Over the past 13 years, leisure hotel room nights in Center City have increased 189%, from 254,000 in 1997 when GPTMC began advertising to 735,000 in 2009.

Individual Leisure Hotel Room Nights in Center City, 1997-2009



There are many factors contributing to the continued growth of the leisure segment in Center City:

- 1. There's more to do in Philadelphia than ever before.** New and exciting attractions, restaurants and shops are opening up each year. A decade ago, visitors felt they could do Philadelphia in a few hours; now even a whole weekend isn't enough time.
- 2. Philadelphia has what visitors are looking for—especially in difficult times.** Through both the terrorism crisis of 2001-2002 and the economic crisis of 2008-2010, leisure room nights in Philadelphia have continued to grow. The region is authentic, historic, accessible, fun and discoverable—attributes that will always be appealing to visitors.
- 3. New technology has made it easier for savvy consumers to find low rates.** Third-party and opaque booking engines (sites that require users to pay for their room before revealing the property) give hotels more outlets to sell rooms, and both new and returning guests are using all the tools at their disposal to find the best deal—even if that means booking at the last minute.
- 4. With GPTMC, Philadelphia has an organization dedicated to getting the word out about all the great reasons to visit 365 days a year.** Our major brand-building campaigns like **With Love, Philadelphia XO XO™** give visitors and residents alike reasons to feel good about Philadelphia and put it at the top of their travel lists. Plus, we continue to embrace new and effective ways to tell and sell the Philadelphia story, with a new Web site, numerous social media properties and a communications team that embraces Philadelphia's presence in pop culture.
- 5. Our partners are now more adaptable than ever before.** Hotels are selling rooms differently, attractions are working together to package their offerings and many stakeholders are adapting our popular and effective **With Love** campaign for their own marketing purposes. In these not-so-rosy times, Philadelphia's tourism industry is working together to make sure the region's appeal as a vacation destination continues to grow.

Our Big Stories: Saturday Night Success

For the sixth straight year, Saturday night was the busiest night of the week for Center City hotels, with occupancy at 81%. In each of those six years, Saturday night occupancy in downtown Philadelphia outpaced downtown Boston, Washington, DC and Baltimore.

Downtown Saturday Night Hotel Occupancy, 2004-2009

Year	Philadelphia	Boston	Washington, DC	Baltimore
2004	81%	80%	71%	75%
2005	81%	79%	71%	79%
2006	81%	80%	67%	73%
2007	81%	79%	71%	74%
2008	79%	77%	71%	67%
2009	81%	77%	71%	68%
Average	81%	79%	70%	72%

Smith Travel Research

While special events and meetings help Saturday night occupancy at our Center City hotels, it takes more to keep them filled every weekend. It takes consistent visitation from leisure tourists who come to enjoy everything in the destination, week after week and year after year.

On some Saturday nights, hotels fill up so fast that there aren't even enough rooms for all the leisure tourists who want to stay in Center City. Nearly half of the Saturday nights in 2009 (25 of 52) had an occupancy over 90%, meaning many hotels were sold out.



Top 10 Reasons Visitors Choose to Make the Trip

1. Culture, Anyone?: Visitors get their culture fill everywhere, from concerts at classic and new music venues all over town to *Art After 5* at the Philadelphia Museum of Art and everywhere in between.

2. Wine and Dine: More than 200 outdoor cafes line the city's sidewalks, helping to make Philadelphia the thriving "foodopolis" it is today.

3. Only in Philadelphia: People love events and festivals unique to the region, such as *Wawa Welcome America!* and Kennett Square's *Mushroom Festival*.

4. Style Central: With *Philagrafika*, *DesignPhiladelphia*, *Philadelphia Fashion Week* and indie boutiques galore, Philly's creative side is booming.

5. 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 cheesesteak debate.

6. Phanatical Philly: Philly keeps us cheering with eight professional sports teams, iconic venues and longstanding traditions like the *Army-Navy Game*.

7. The Great Outdoors: William Penn's "greene countrie towne" is thriving. Hikers, bikers and boaters find so much to love about Philadelphia's parks and trails.

8. Get a Room: Visitors can choose from AAA Five Diamond Award® winners, elegant retreats, B&Bs, boutique hotels, family-friendly lodgings and LEED-certified hotels.

9. Keep on Moving: Tour-goers get around town on Segway scooters, purple trolleys, double-decker buses, amphibious vehicles—or on foot.

10. The Real Deal: While wandering our neighborhoods and main streets, visitors get the sense that Philadelphia is really a collection of small towns in a big city.

Our Big Stories: Marketing Campaigns

With Love, Philadelphia XOXO™

“When it comes to GPTMC, love is in the air, or at least on the airways. And to quote the Beatles, ‘with a love like that, you know it can’t be bad.’ That’s how I feel about the current With Love, Philadelphia XOXO campaign — it can’t be bad — particularly the advertisements that are being aired in this region. ... GPTMC knows the power in having local people who are willing to sing the region’s praises.” – Philadelphia Business Journal editorial (circulation: 12,203), August 7-13, 2009

In response to the great recession, GPTMC quickly developed a recessionary marketing plan focused on the game-changing **With Love, Philadelphia XOXO™** campaign, conceived by Red Tettemer and launched in May 2009. What a game changer it continues to be! The 150 love letters, written by Philadelphia itself in a funny and inviting tone, demonstrate a little bit of our Philly attitude as they invite all sorts of travelers to visit—families, singles, African-Americans, couples, gays and lesbians, New Jersey and New York residents, history buffs, foodies, “room service junkies” and dozens of others. This versatility also gave us a great opportunity to reach more people in more places with the help of 130-plus partners throughout the region who adopted and adapted the campaign for their own marketing purposes.

Not only was **With Love** a hit among residents of the Philadelphia area, where much of the early advertising ran, it also resonated with folks in our critical markets. Best of all, the campaign delivered for us in a big way. In summer 2009, leisure was up 10,000 room nights over summer 2008, exceeding all projections. For the year, leisure travelers filled 735,000 room nights in Center City Philadelphia, up 3% from 2008—a win of 5%, since leisure was forecasted to be down 2%. In fact, leisure was the only segment to show growth in 2009.



Billboard, transit and online ads



With Love Banner, Avenue of the Arts

Con Cariño, Philadelphia XOXO

In 2009, GPTMC’s communications team continued its outreach to the growing Hispanic market by embarking on a partnership with television station WWSI Telemundo to promote the **With Love** campaign—or **Con Cariño, Philadelphia XOXO**—in the Philadelphia, Washington, DC and New England markets. What’s more, an aggressive media relations push yielded national stories in Hispanic and mainstream media about the destination. One very notable result: *USA Today* recognized Philadelphia in its list of “10 great places for Latino flavor, flair” in 2009.

GPTMC continues to build a strong presence in the online media world with an active social media program—including Latino Philadelphia-focused Twitter account @PhillyTeAma—that reaches out to young adults and families. We’ve also populated our pressroom (visitphilly.com/pressroom) with more releases in Spanish and more photos featuring local Hispanic models.

Phillie Phanatic Phever

Baseball is big business *and* big fun in Philly, and a huge part of the sell is the beloved Phillie Phanatic. That’s why we teamed up with the Philadelphia Phillies to launch the “Phanatic Around Town” public art project, a tourism and fan initiative placing 20 hand-painted Phanatics—one of which is adorned **With Love**-style—at popular spots throughout the city all summer long. Not only is the project a hit among residents and visitors determined to get their photos taken with all 20 versions of the mascot—and tour the city in the process—it’s also a homerun for media outlets that have covered the story extensively.



Dear Philadelphia,
 What I love most about you is how much you love the arts. They are an important part of this city’s past and central to its future.
 With Love,
Timothy Rub, The George D. Widener Director and CEO, Philadelphia Museum of Art
XOXO



Philly 360®

“Wanted: Well-traveled, technologically savvy, energetic African Americans to sample the City of Brotherly Love’s nightlife, culture, and rich history. To get those travelers here, the Greater Philadelphia Tourism Marketing Corp. is launching an aggressive campaign today called Philly 360. While the tourism group has marketed to African Americans since 1997, this is the first time it is targeting the emerging and coveted group of urban African Americans under 40 who travel.” – The Philadelphia Inquirer (circulation: 288,298), September 25, 2009

GPTMC’s newest African-American marketing initiative, **Philly 360®** spotlights trendsetters—musicians, visual artists, dancers, poets, designers and producers—who are in touch with what’s cool, hip and hot in the city and the region. These Creative Ambassadors, led in 2009 by Grammy®-winning hip-hop group The Roots and in 2010 by singer/songwriter Marsha Ambrosius, use their social networks to build buzz about Philly as a travel hotspot and encourage a younger, affluent, tech-savvy crowd to visit.

The program, which officially launched in June 2009, has been effective in reaching new potential visitors through a nontraditional, social media-focused campaign that spotlights Philly’s music scene, boutiques, restaurants, bars and clubs, cultural events and more. GPTMC developed a Web site, video series, limited-edition book, radio partnerships, e-newsletters and social media assets to get our message out. And we’ve successfully fostered collaboration between the African-American creative community and the tourism, arts and culture, government and business communities.

In May, we launched the newest component of **Philly 360®**. Visitors to the newly redesigned visitphilly.com/philly360 can delve even deeper into the creative arts scene through videos and photos; prominent **Philly 360®** social media tools; insider fashion, music, travel and arts news and tips; upcoming events like concerts, special DJ nights and exhibitions; and our Creative Ambassadors’ profiles and Philly favorites. The site sports a sophisticated yet fun design, and the easy-to-use back-end functions allow us to keep the site updated with the latest news—so people can check back every day for their **Philly 360®** scoop.



Our Big Stories: Online Growth

visitphilly.com and uwishunu.com

New name, new look and a record number of visits—it has been a big year for Greater Philadelphia’s official tourism Web site, now known as **visitphilly.com**. In January 2010, the new, renamed tourism Web site replaced the popular gophila.com—a site that received 40 million visits throughout its existence and ranked #1 on Google for the search term “Philadelphia.” The dramatically enhanced Web site strengthens GPTMC’s ability to market **Philadelphia and The Countryside®** as a premier visitor destination to an ever-growing online audience.

New Name: The most apparent upgrades to **visitphilly.com** are the bold new look and name, a name that improves the marketability of the site by telling users exactly what we want them to do—visit Philly. In addition, as consumer behavior leans more toward search engine use, the name **visitphilly.com** improves the Web site’s searchability. People type “visit,” “Philly” and “Philadelphia” when looking for travel information, which helps the new site rank higher on more searches.

New Design: Once visitors are on **visitphilly.com**, the sleek design and vibrant photography keep them on the site longer, and GPTMC research proves that the longer people stay on the site, the more likely they are to book a trip. Users also see more prominent social media tools, allowing them to find, follow and friend Greater Philadelphia on Facebook, Twitter, Flickr or YouTube.

Better Integration: The award-winning **uwishunu.com** continues to be integrated into **visitphilly.com**, with greater presence and related posts throughout the site. Launched in 2006, the insider blog has grown from a forum for lesser-known Philly secrets to the important “what’s happening” arm of **visitphilly.com**.



Social Media

These days, everyone has an audience, whether on a blog, Twitter, Facebook or other social media platform, and Philadelphia is no exception. We at GPTMC meet our friends, fans and followers on the platform of their choice to connect them with the region, and we've been doing it since 2006 when we adopted social media programs such as **SoundAboutPhilly**® podcast tours; the **uwishunu.com** tourism blog; and BlogPhiladelphia, the city's first social media "unconference."

In 2009, we ramped up our efforts:

- We now have four Twitter accounts that speak to audiences interested in different aspects of Philadelphia: general interest, insider, African-American and Hispanic. In 2009, our total number of Twitter followers grew from 1,000 to 8,000, a 700% increase.
- In the first nine months since its June 2009 launch, the **facebook.com/visitphilly** fan page grew to more than 7,500 fans. We then added two more fan pages to court gay and lesbian and African-American travelers.
- The more than 50 videos on our YouTube channel get thousands of auxiliary views from the site, one of the largest search engines on the Internet.
- Since we established a Flickr account in 2008, our **Philadelphia and The Countryside**® images have wowed viewers more than 150,000 times.

So, what *do* we do with all these fans and followers? We publicize events, monitor and respond to what people say about our region, highlight new additions to **visitphilly.com** and **uwishunu.com**, share brag-worthy facts, distribute images and messages relevant to our campaigns, answer travelers who need advice, broadcast giveaways and promotions, disseminate hotel and restaurant deals and support our partners. Most importantly, our social media marketing efforts go hand-in-hand with our traditional marketing to attract potential visitors to the Philadelphia region.



Philadelphia International Flower Show

10 Reasons to Visit uwishunu.com Every Day
uwishunu.com features information from in-the-know Philadelphians about subjects that both residents and visitors find compelling. And since GPTMC posts an average of eight new articles every day, people can check back every week, every day or multiple times a day to plan their trips or their weekend.

Here are just 10 things you can find on **uwishunu.com**:

1. Hotel news, including special rates, hotel restaurant information and eco-friendly features
2. Restaurant openings, deals and new menus
3. Ongoing coverage of popular events and festivals, such as *Philly Beer Week* and *Wawa Welcome America!*
4. New store previews
5. Theater, music and exhibition reviews
6. Attraction profiles
7. Sports promotions and happenings
8. Special series, including the "With Love Letter" interviews with famous Philadelphians
9. Weekend roundups of the best things to do
10. Exclusive contests and giveaways

Dear Philadelphia,
What I love most about you is your diversity of people, cultures and neighborhoods!
With Love,
Sulaiman Rahman, chairman, African-American Chamber of Commerce
XOXO



Our Big Stories: Collaboration Is Key

To spread the **Philadelphia and The Countryside**® message to larger audiences while leveraging our limited funds, GPTMC partners with media outlets, hotels, attractions, restaurants, retail shops and so many others. These collaborations extend the Philadelphia brand locally, regionally and nationally to audiences we wouldn't otherwise reach. Here's a look at the types of partnerships GPTMC forged over the past year:

Media Outlets: In 2009, GPTMC partnered with every local Philadelphia television station, as well as radio and print outlets. When we engage this Philadelphia DMA (designated marketing area), we share our message with approximately 40% of Pennsylvania's population, along with 78% of Delaware's population and 25% of New Jersey's population. Through these mutually beneficial relationships, GPTMC reaches residents—whom we rely on to bring friends and family to the region—through promotions, on-air segments and expanded Web coverage.

Hotels: GPTMC convenes the Hotel Initiative Committee bi-monthly to discuss how we're getting heads in beds. The advisory group provides us with valuable information about their customers, seasonal demand periods and booking trends so that we can better shape our campaigns that invite them to stay over—and over and over. The hotels help us spread our **With Love, Philadelphia XOXO™** campaign by displaying love letter banners and other love-inspired messages throughout their properties and by using the creative to communicate with their customer e-mail lists. GPTMC also leverages our media partnerships to highlight hotels through giveaways and contests.

Attractions, Restaurants and Shops: In this time when every dollar is critical, we strive to coordinate better with our attraction and retail partners. Hotel guests received our *With Love, Philadelphia XOXO™ Dining Guide*, a pass to exclusive prix-fixe menus at 26 eateries around the city, along with our *Philadelphia Privileges* coupon book, featuring attraction, tour, restaurant and store discounts. Local shops invited tourists to browse their goods by sticking our **With Love** decals on their windows.

Online: The new **visitphilly.com** maintains strong relationships with its partners. Google provides dynamic mapping features; Travelocity's booking widget makes **visitphilly.com** the one-stop site for reserving accommodations, rental cars, flights and attraction tickets; the **phillyfunguide.com** events calendar keeps users updated on what's going on; and the City of Philadelphia's **phila.gov**, the Philadelphia International Airport's **phl.org** and the U.S. Travel Association's **discoveramerica.com**—all heavily trafficked sites—have prominent links to **visitphilly.com** on their homepages for those looking to plan a visit.



Convention and Visitors Bureau Leaders

From top left: Paul Decker, Valley Forge Convention and Visitors Bureau; Blair Mahoney, Chester County Convention and Visitors Bureau; Tore Fiore, Delaware County's Brandywine Conference and Visitors Bureau; from bottom left: Jerry Lepping, Bucks County Conference & Visitors Bureau; Tom Muldoon, Philadelphia Convention & Visitors Bureau



Dear Philadelphia,
What I love most about you is your great chefs and restaurateurs—Stephen Starr, Marc Vetri, Jose Garces, Georges Perrier, Masaharu Morimoto and the rest of Philadelphia's finest.
With Love,
Evan Evans, hotel manager, Le Méridien Philadelphia
XOXO

GPTMC and the IVCC: A Match Made in Tourism Heaven

To connect with people even more both in and outside of the Philadelphia region, GPTMC and the Independence Visitor Center Corporation (IVCC) embarked on a new partnership in early 2010. The IVCC's direct experience with visitors and GPTMC's marketing know-how make a perfect tourism match. The IVCC Web site now links directly to visitphilly.com for tourist information, giving travelers consistent and up-to-date information from one site. GPTMC incorporates the IVCC into its marketing, directing tourists to the Independence Visitor Center for concierge services, brochures and more. And while they're there, those visitors see our **With Love** banners and messages throughout the building.

Listen Up: HearPhilly's a Hit

Now in its third year, online radio station HearPhilly—a first-of-its-kind endeavor produced in partnership with CBS Radio station KYW News—continues to resonate with listeners, who logged onto the program more than 300,000 times in 2009. HearPhilly is now available on the BlackBerry and iPhone, and the hour-long, streaming content is updated regularly with trip-planning tips and the inside scoop on hotels, restaurants and Philadelphia happenings from KYW Newsradio reporters.

Parking Made Easier

In 2009, GPTMC responded to a media challenge: *Parking Wars*. The A&E show gives the perception that parking in Philadelphia is too difficult, too expensive and too much of a hassle. Since the city is conveniently located within a five-hour drive of a quarter of the U.S. population, GPTMC responded immediately by teaming up with the Philadelphia Parking Authority (PPA). We produced three educational and entertaining videos and created a dedicated page on our Web site to help visitors navigate parking in Philly. visitphilly.com/parking guides users through the dos and don'ts of city parking, highlights some great parking deals that the PPA offers and links to hotel packages that include free parking. Also on the site: the three 90-second, love letter-themed parking videos that explain SmartCards, parking kiosks and parking signs.

It's an A+ for AAA

Through our longstanding partnership with the American and Canadian Automobile Associations (AAA and CAA), GPTMC connects **Philadelphia and The Countryside®** to 2.3 million AAA members in the Mid-Atlantic region alone. GPTMC's face-to-face relationships with travel agents in the Mid-Atlantic, New York, Southern New England, Ohio and Canada offices yield big results: Loyal AAA members book 42% of the hotel stays in the Philadelphia region each year. GPTMC supplements the work of the travel agents with vibrant **With Love** ads in *AAA World* magazine and the *AAA New Jersey & Pennsylvania TourBook*. These strategic placements drive people to visitphilly.com/aaa, where they find exclusive hotel packages, including exhibition tickets, dining experiences and more.

Thanks, We Couldn't Do It Without You

It takes a village to make Greater Philadelphia a premier tourism destination. Our local, regional and national partners help us get the job done and get it done well. Thanks to all of you who help make Philly the fun and thriving place visitors love to experience over and over again.

- Governor Edward G. Rendell
- Mayor Michael A. Nutter
- Pennsylvania Department of Community and Economic Development
- Pennsylvania State Legislature
- Philadelphia City Council
- Bucks County Conference & Visitors Bureau
- Center City District
- Chester County Conference and Visitors Bureau
- City of Philadelphia and phila.gov
- Delaware County's Brandywine Conference and Visitors Bureau
- Economy League of Greater Philadelphia
- Greater Philadelphia Chamber of Commerce
- Greater Philadelphia Cultural Alliance & phillyfunguide.com
- Greater Philadelphia Hotel Association
- Independence National Historical Park
- Independence Visitor Center Corporation
- Pennsylvania Association of Convention and Visitors Bureaus
- Pennsylvania Convention Center Authority
- Philadelphia Convention & Visitors Bureau
- Select Greater Philadelphia
- Valley Forge Convention and Visitors Bureau

For the full list of our partners, go to visitphilly.com/partners.

Dear Philadelphia,
What I love most about you is you truly are the "City of Brotherly Love," and it is proven through the strong partnerships among organizations throughout the region.
With Love,
James J. Cuorato, president and CEO, Independence Visitor Center
XOXO



Who Visits?

Thirty-six million domestic travelers visit Greater Philadelphia each year, and more than 80% of them are leisure travelers—people who choose to come here for fun. Of our leisure travelers, 11.35 million chose to spend the night in the region in 2009, a 55% increase from 7.3 million in 1997 when GPTMC first began promoting the region as a leisure destination.

Total domestic visitation to Greater Philadelphia fell about 2% in 2009. Nationwide, domestic trips dropped 3% because of the state of the economy.

Domestic Visitation to Greater Philadelphia, 2008-2009 (in millions)

Segment	2009	2008	% Change
Total Domestic Visitation	36.01	36.72	-1.9%
Overnight Leisure	11.35	11.56	-1.8%
Day Leisure	20.50	20.83	-1.6%
Overnight Business	1.80	1.89	-5.0%
Day Business	2.36	2.44	-3.2%

Longwoods International, Tourism Economics

Note: Visitor volume estimates have changed as a result of a new methodology employed by Longwoods International, which more accurately captures visitors to Greater Philadelphia. Estimates for prior years have been adjusted to reflect this change and maintain consistent growth rates year over year.

Greater Philadelphia Visitor Demographics, 2009

Category	Overnight Visitors	Day Visitors
Age	44.4	44.8
Household Income \$75K+	52%	48%
College Degree or Higher	71%	62%
Length of Trip (nights)	3.3	N/A
Length of Stay in Greater Philadelphia (nights)	2.5	N/A
Travel Party Size	2.5	2.6
Traveling with Children Under 18	20%	27%

Longwoods International, Tourism Economics



It's All About Who You Know

Actually, it's all about who you market to, especially in recessionary times. GPTMC identified the Philadelphia region's eight most loyal types of visitors—those who will travel in a tough economy—and we're focusing our marketing efforts on these groups.

1. Returning Visitors: 60% of overnight visitors tell us they've been here before, and these people plan different trips than first-timers. (GPTMC surveys)

2. Families Educating Children: In January 2010, 80% of households with children reported traveling in the previous year. (TNS Travel & Transport)

3. Visiting Friends and Relatives (VFR): Nearly one-third of overnight VFR visitors stay in a hotel. (Longwoods International)

4. Affluent Travelers: For Americans who want upscale vacations, Philadelphia's premier arts, dining and cultural scenes make it a perfect alternative to a costly European trip.

5. GLBT Travelers: Philadelphia now ranks as the #11 destination for GLBT travel, after not appearing on the top 20 list a decade ago. (Community Marketing, Inc.)

6. Festival- and Event-Goers: Festivals and special events—*Mummers Parade*, *Philadelphia International Flower Show*, *Philly Beer Week*, *Wawa Welcome America!* and *West Oak Lane Jazz and Arts Festival*, to name some of the favorites—keep people traveling for the things they love to do.

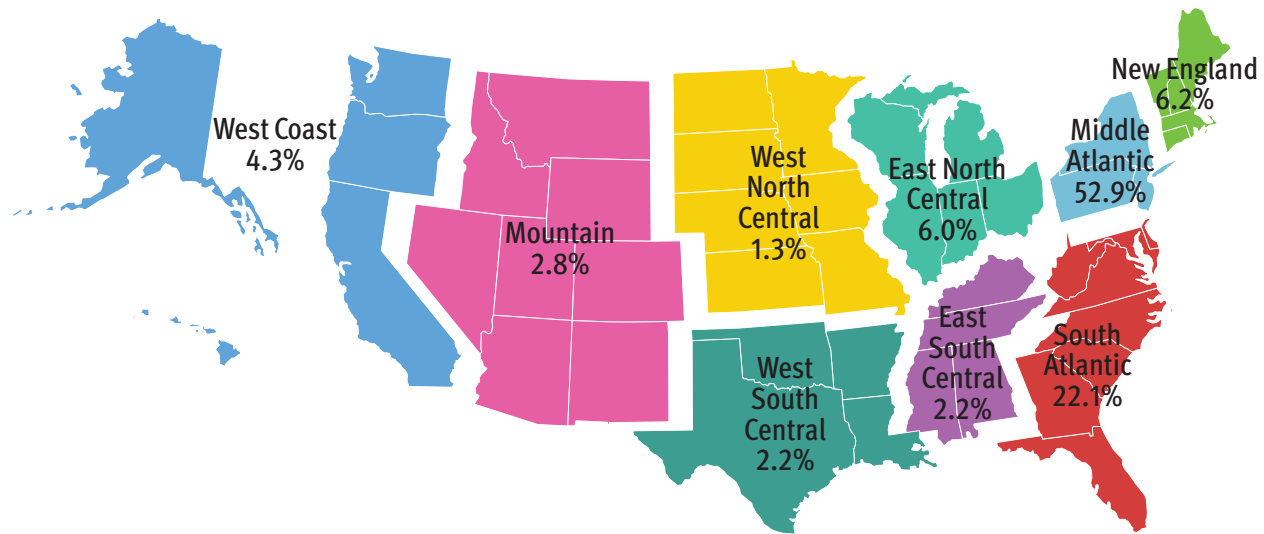
7. Those Planning Weekend Getaways: With shorter trips and more weekend "staycations" the norm, Saturday was the busiest hotel night of the week in 2009 for the sixth straight year. (Smith Travel Research)

8. Younger, Tech-Savvy African-American Travelers: GPTMC's new **Philly 360**® campaign builds on our years of successful African-American marketing efforts.

Where Do They Come From?

Greater Philadelphia's location within a driving distance of several major population centers is a big advantage at a time when travelers are looking for value.

Domestic Overnight Visitors to Greater Philadelphia by Region, 2009



Longwoods International

Looking Ahead

Nationally, domestic travel fell in 2009 for the second consecutive year, according to the U.S. Travel Association.

- Leisure trips fell 2% to 1.47 billion.
- Business trips fell 6.2% to 433 million.

For 2010, the U.S. Travel Association projects growth in both the business and leisure segments. This growth is expected to continue through 2013, with each segment increasing 1% to 4% each year.

- Leisure trips are expected to return to the peak levels of 2007 by 2011, spurring further growth.
- Business trips are expected to remain below 2006 levels even after several years of growth.

Domestic Travel Forecast

	Leisure		Business	
	Total	% Change	Total	% Change
2006	1.49 billion	0.6%	509 million	-0.2%
2007	1.51 billion	1.2%	494 million	-2.8%
2008	1.50 billion	-0.4%	461 million	-6.7%
2009	1.47 billion	-2.0%	433 million	-6.2%
2010*	1.50 billion	1.9%	444 million	2.5%
2011*	1.54 billion	2.7%	460 million	3.7%
2012*	1.58 billion	2.4%	467 million	1.6%
2013*	1.60 billion	1.5%	473 million	1.3%

U.S. Travel Association, Tourism Economics
*Projected

Research Counts

Check out GPTMC's research reports, hotel stats and visitor surveys— all downloadable for free— at visitphilly.com/research. Here's a look at what you'll find:

- **Monthly Hospitality Snapshot:** GPTMC, the Greater Philadelphia Hotel Association and the Philadelphia Convention & Visitors Bureau jointly sponsor PKF Consulting's *Snapshot*, which summarizes hotel and attraction data for our region and for competitive destinations.
- **Seasonal Hotel Surveys:** For more than five years, GPTMC has surveyed visitors who make their hotel reservations on visitphilly.com to find out what they did on their trip, how much they spent and whether they intend to return to Philadelphia again and why.
- **Visitor Demographics:** GPTMC uses the syndicated Travel USA® survey from Longwoods International to determine who is visiting the Philadelphia region.

Where Do Visitors Stay?

Each year, more and more people choose to make Philadelphia the destination for their vacation, getaway weekend or special event. While planning their trips, they have many top-quality accommodations from which to choose—marquee hotels, boutique properties, pocketbook-friendly chains, eco-friendly options or bed and breakfasts—in order to make their stays in Philadelphia comfortable and enjoyable. Visitors also have hundreds of special packages to consider—many of which GPTMC has developed in partnership with the regional hotel community and popular attractions, seasonal events and blockbuster exhibitions.

2009 Hotel Overview

2009 was a difficult year for the hospitality industry, with challenging economic conditions contributing to declining occupancy and falling hotel rates.

- Occupancy in Philadelphia held up better than the national average, falling 5% regionally and 3% in Center City compared to 9% nationwide.
- Rates in Philadelphia dropped a bit more than the national average, falling 12% regionally and 11% in Center City compared to 9% nationwide. Rates in Greater Philadelphia remain well above the national average.

Philadelphia and National Hotel Performance, 2008-2009

	Occupancy			Average Daily Rate (ADR)			Revenue Per Available Room (RevPAR)		
	2009	2008	% Change	2009	2008	% Change	2009	2008	% Change
National	55%	60%	-9%	\$98	\$107	-9%	\$54	\$64	-17%
Five-County Region	63%	66%	-5%	\$119	\$134	-11%	\$74	\$88	-15%
Center City	68%	71%	-3%	\$152	\$174	-13%	\$104	\$123	-15%

Smith Travel Research, PKF Consulting (Center City)



Greater Philadelphia Hotel Association Representatives

From left to right: Ed Grose, executive director; Rick Staub, second vice president; Allan Darnel, treasurer; Julie Coker, first vice president; A.J. Williams, secretary; Jim Gratton, president



Dear Philadelphia,
 What I love most about you is how you've taken care of our men and women in uniform. From the *Army-Navy Game* to the discounts at hotels and restaurants for our brave soldiers, you have provided smiles and fond memories to many.

With Love,

Joe Brooks, president and COO, USO of Pennsylvania and Southern New Jersey

XOXO

Hotel Market Mix

While the total number of occupied rooms fell 1.5% in Center City in 2009, the leisure segment continued to grow. Individual and group leisure travelers combined to fill more than one million hotel rooms in 2009, accounting for 40% of total demand. In 2009:

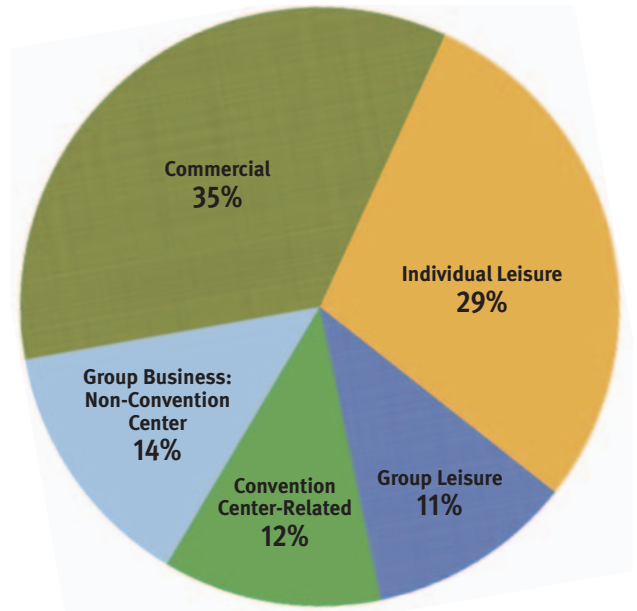
- Individual leisure travelers filled 735,000 room nights, an increase of 3% from 2008.
- Group leisure, including social events like weddings, family reunions and graduation parties, held steady, filling 284,000 room nights.

Center City Philadelphia Hotel Market Mix, 2008-2009

Segment	2009	2008	% Change
Commercial	887,000	883,000	0.5%
Individual Leisure	735,000	714,000	2.9%
Group Leisure	284,000	283,000	0.4%
Convention Center-Related	303,000	316,000	-4.1%
Group Business: Non-Convention Center	348,000	400,000	-13.0%
Total Demand	2,557,000	2,595,000	-1.5%

PKF Consulting

Center City Hotel Market Mix, 2009



Source: PKF Consulting

Long-Term Growth

Despite a difficult year in 2009, the Center City hotel market has shown above-average growth over the past two decades.

- Room supply and room demand have grown nearly **twice as fast as the national average**.
- Rates have gone up nearly 3% a year—in line with the national average.

20-Year Average Annual Hotel Growth, National and Center City Philadelphia

	Supply	Demand	Occupancy	ADR	RevPAR
National	2.0%	1.4%	-0.7%	2.8%	2.1%
Center City	3.6%	3.5%	-0.1%	2.7%	2.6%

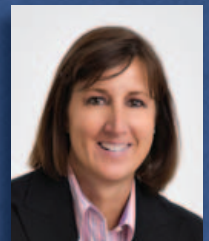
Smith Travel Research, PKF Consulting (Center City)

Dear Philadelphia,
 What I love most about you is that you have something for everyone in the family—great shopping (tax free!), sports, excellent food, museums and history. And the best part: We can do it all without getting in a car.

With Love,

Peggy Trott, general manager, Hotel Palomar Philadelphia

XOXO



What's the Impact?

The tourists who fill our attractions, restaurants, shops and streets are an essential part of the Philadelphia region's economy. Each day, visitor spending generates \$22 million in economic impact for the region, supporting local businesses, creating jobs and generating tax revenue.

Visitor spending in Greater Philadelphia fell 13% in 2009; nationwide, it dropped 9%. This decline was the result of a combination of factors, including the reduced number of travelers, lower prices throughout the industry and more frugal spending habits of travelers.

In 2009, the Greater Philadelphia tourism industry generated:

- \$8.2 billion in economic impact
- \$1.2 billion in federal, state and local taxes
- 83,664 jobs (5% of all jobs in region)
- \$2.6 billion in wages

Tourism Economics

Tourism Economic Impact by County, 2009

Category	Bucks	Chester	Delaware	Montgomery	Philadelphia	Total
Economic Impact	\$763 million	\$797 million	\$674 million	\$1.32 billion	\$4.61 billion	\$8.16 billion
Taxes Generated	\$109 million	\$112 million	\$93 million	\$185 million	\$715 million	\$1.21 billion
Jobs Supported	11,443	9,038	9,142	17,443	36,598	83,664
Wages Generated	\$249 million	\$250 million	\$227 million	\$453 million	\$1.43 billion	\$2.61 billion

Tourism Economics

Tourism Benefits Regional Residents

Every day, visitor spending in Greater Philadelphia's restaurants, shops and hotels generates \$22 million. But the impact of tourism on our regional economy does not end there. When tourists spend here, the money stays here: Area businesses purchase more goods, provide more services and, most importantly, hire more employees. More than 83,000 Greater Philadelphia jobs were supported by tourist spending in 2009, ranging from frontline staff to executive positions. Tourist spending sustains jobs in expected sectors, like lodging and transportation, and makes its way to unexpected ones, like finance, real estate and business services.



Morris Arboretum

In addition, the restaurants, stores and attractions supported by visitor dollars are the same places residents love to eat, shop and play. No building in Greater Philadelphia has a "Visitors Only" sign on it—all of the arts, culture and dining that make Philadelphia a vibrant tourist destination make it a great place to live as well. Philadelphia residents have been at the center of Philadelphia's rise as a tourism destination over the past decade. When locals invite their friends and family to join in the fun, everybody wins!



Dear Philadelphia,
 What I love most about you is your spirit of can-do and collaboration—from the Founding Fathers to the Phillies to the fine arts, you're a city that has always made an impact. Although you're known around the world for a spirit of independence, your secret strength is in the power of partnerships.
 With Love,
Gail Harry, president and COO, Philadelphia Museum of Art
XOXO

According to the Press

The New York Times

“Philadelphia’s evolution from day trip to destination city is such that you can spend a long weekend there without visiting any 18th-century sites, and not even miss them.”

– *The New York Times* (circulation: 1,000,665), May 10, 2009

The Washington Post

“With its abundance of BYOB restaurants, trailblazing chefs and thrilling interiors ... Philadelphia rivals Washington when it comes to matters of taste.” – *The Washington Post* (circulation: 665,383), May 24, 2009



“South Philly, long a mostly Italian neighborhood, now boasts an impressive array of small Asian restaurants, taquerias and gastropubs in the Italian Market neighborhood along Ninth Street near Washington Avenue. You can easily have a hoagie for lunch, sample some imported cheese in the afternoon, grab some pad Thai for dinner and tres leches cake for dessert -- and not spend more than \$20.” – *USA Today* from Associated Press (circulation: 1,900,116), February 10, 2009

AP Associated Press

“Visitors to Philadelphia need not limit their interests to Ben Franklin and the Liberty Bell. There are a host of outdoor adventures as well, from kayaking and biking in the city to a zipline tree canopy tour nearby.” – Associated Press, August 3, 2009



“By trip’s end, two things are certain: you won’t leave Philly hungry, and you’ll have a whole new appreciation for the Cradle of Liberty!” – *Bust* (circulation: 93,500), April/May 2010

The Philadelphia Inquirer



– *The Philadelphia Inquirer* (circulation: 333,086), October 24, 2009

Richmond Times-Dispatch

“The tranquil natural beauty of the Valley Forge area and Montgomery County make them a prime site for all types of recreational activities, everything from biking and horseback riding to fishing and golfing.” – *Richmond Times-Dispatch* (circulation: 178,823), March 7, 2010



“Find local life and the pursuit of happiness in the indie-loving Northern Liberties neighborhood. Northern Liberties, a Philadelphia neighborhood north of Center City along the Delaware River, has been touted as ‘emerging’ for more than a decade, but it finally seems to have arrived.”

– *National Geographic Traveler* (circulation: 727,551), September 2009

The Record

“Philadelphia is another of my favorite art towns. You’ve got the institutions along the Benjamin Franklin Parkway, including the Philadelphia Museum of Art ... And for contemporary art, just drive down any street and lay your eyes on the various expanses of building walls: Philly has one of the biggest collections of urban murals in the country.” – *New Jersey’s The Record* (circulation: 364,827), February 7, 2010

The New York Times

“There is a particularly Philadelphian brand of hardy, low-budget, do-it-yourself, do-it-for-love creativeness evident in art and art spaces across the city. It is a climate that, as new as it sometimes feels, has been embodied and nurtured for decades ...”

– *The New York Times* (circulation: 927,851), August 28, 2009

Men’s Journal

“The City of Brotherly Love boasts a huge crop of emerging microbreweries, an upsurge in beer-focused events, and a strong brewing tradition dating to before founding beer godfather Ben Franklin and the Revolutionary War. But what earns Philly its status as one of the country’s best beer cities is its abundance of truly world-class micro-pilsners.”

– *Men’s Journal* (circulation: 1,866,231), October 2009

New York Daily News

“Little wonder so many New Yorkers regard Philadelphia as a home away from home. The lively streets, leafy public squares, gourmet restaurants and lively arts scene make it (almost) as cool and exciting as our own fair city. Factor in its history as the nation’s first capital and Philly makes the perfect ultra-accessible getaway.”

– *New York Daily News* (circulation: 644,766), June 14, 2009

THE GLOBE AND MAIL

“Philly is a city with history to burn, where it is possible to eat just as well as in New York for a fraction of the price; where museums overflow with fascinating (and relatively un-crowded) exhibits; with many of the same shops that crowd the streets of Chelsea and SoHo; and where getting around, by foot or by cab, is a cinch.”

– Toronto’s *The Globe & Mail* (circulation: 143,372), April 25, 2009

New York Newsday

“From hipster havens packed with trendy galleries and downtown shopping to distinctive communities that retain the city’s classic traditions (Mummers, anyone?), Philadelphia has a neighborhood for every taste.”

– *New York Newsday* (circulation: 1,703,421), November 12, 2009

bon appétit

“Summer vacation with the kids just got a lot more delicious: The City of Brotherly Love has become an urban culinary mecca, with good eating as much of a draw as the Liberty Bell, the Rocky Balboa statue, and the diverse culture. Yes, there are the classic cheesesteaks and soft pretzels, but Philadelphia also boasts standout craft beers and a spate of gastropubs and restaurants.”

Parents.

“Your kids learn about our nation’s past in school, but they’ll be more impressed after visiting Independence Hall, birthplace of both the Constitution and Declaration of Independence. This historic city helps bring the American Revolution to life (gophila.com).”

– *Parents* (circulation: 2,208,135), September 2009

StarTribune

“Every city has its lesser-known treasures like the Mutter, and as I found in Philadelphia, it pays to seek them out. You’ll not only discover unique sights, but you’ll gain insight into the local culture, and maybe even meet some of the area’s more colorful figures.”

– Minneapolis-St. Paul’s *Star Tribune* (circulation: 570,443), June 14, 2009

Woman’s World

“In every season, Philadelphia will stir your patriotic soul as you follow in the footsteps of our founding fathers... But don’t be fooled by the stopped-in-time look: Philadelphia buzzes with 21st-century energy.”

– *Woman’s World* (circulation: 1,387,414), April 13, 2009

Forbes

“Philadelphia was born to be a walking city. Four centuries of architecture spread themselves out in a wide swath of blocks between two rivers, and because original city planners such as William Penn set out to build a ‘green country town,’ five of the major squares are city parks.”

– forbestraveler.com (unique visitors per month: 395,092) October 5, 2009

The Philadelphia Inquirer

“Over the last five years, and despite the current economic depression, Philadelphia has managed to cultivate its very own fashion community, rich in both retail and design.”

– *The Philadelphia Inquirer*

(circulation: 361,480), January 20, 2010

VIBE

“Still in its infancy, the 2nd Annual Roots Picnic solidified itself as a contender for Best Summer Music festival with a lineup that was so jam-packed, organizers may want to consider spreading out next year’s event over two days instead of one.”

– *vibe.com* (unique visitors per month: 320,261), June 8, 2009

Shape

“We love a city that makes it easy to get outside and exercise.

In addition to the 300 miles of bike paths in and around Philadelphia, you’ll also find running trails, water sports, athletic groups, and a hot restaurant scene (so you can fuel up before and after).” – *Shape* (circulation: 1,703,421), June 2009

HOME Miami

“Philadelphia’s proud design history goes back to when the city’s artisans turned out the finest silver and formal furniture in the colonies, plus its subsequent century as a textile powerhouse. Things have not let up.” – *HOME Miami* (circulation: 110,000), October/November 2009



“Philadelphia is a national treasure for the entire family.”

– Mark Orwoll from *Travel + Leisure on CNN Saturday Morning*

(Nielsen Net Rating: 611,227), August 29, 2009

RESIDENT

“A weekend of discovery is only two hours away. Families will find a lot to do in Philadelphia. In addition to its great parks and zoo, the nation’s first, Philadelphia is full of museums.”

– *New York Resident* (circulation: 250,000), May 1, 2009

GLAMOUR

“Instead of flying to Las Vegas, hop in the car and explore a nearby city. Try Savannah; Portland, Oregon; or, for East Coasters, we love Philadelphia!” – *Glamour* (circulation: 2,290,452), July 2009



“Philadelphia is a powerhouse destination in its own right, buoyed by new hotel and restaurant openings and a hot gallery scene.”

– *bing.com/travel* (unique visitors per month: 49.3 million), December 30, 2009

New Haven Register

“Plus there’s the Philadelphia Art Museum, the Philadelphia Zoo, the oldest in the country, and — oh my, I’ve got to get back to Philadelphia soon.” – *New Haven Register*

(circulation: 83,064), June 28, 2009



“Philadelphia has always been a hotspot for the creative, a place where artists, innovators and creative types are born and bloom.”

– *Philadelphia Weekly* (circulation: 100,326), February 17-23, 2010

Baltimore

“Though barely a stone’s throw from the metropolitan hub of Philadelphia and not far from Baltimore, the Brandywine River Valley, which stretches from Chester County, PA, south to Wilmington, DE, is a cornucopia of museums and lush gardens.” – *Baltimore* (circulation: 53,151), March 2010



“On every kid’s to-do list: a visit to the city zoo to meet the baby orangutan, riding the carousel and spending hours at the city’s new Please Touch Museum, and a round of Philly-themed mini-golf at renovated Franklin Square.” – *US Airways Magazine* (circulation: 340,894), January 1, 2010

KYW supports GPTMC in its efforts to creatively market Greater Philadelphia as not only a vibrant tourist destination, but a special place that warmly welcomes you back when you've been away.



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