Welcome

- Exclusive Consumer Insights
- Essential Marketing Implications
- Next Steps with VISIT PHILADELPHIA
RECOVERY MESSAGING STRATEGY

CRISIS
- STAY AT HOME
  - Mar-Apr

SUMMER
- WE’RE OPEN CLEAN & SAFE
  - May-Jul
- GIVE THE GIFT OF PHILLY
  - Aug-Sep
- SHOP BLACK & BROWN BUSINESS
- SHOP LOCAL

FALL
- VALENTINE’S WEEKENDS FUTURE TRIPS
  - Nov-Feb
- PHILLY OVERNIGHT PACKAGE
- GENERAL HOTEL STAYS

WINTER ’21
- GENERAL HOTEL STAYS
  - Mar-May

SPRING
- SUMMER MARKETING CAMPAIGN
  - May-Aug

SUMMER
- RECOVERY CAMPAIGN
  - Sep

FALL
- RECOVERY CAMPAIGN
VISIT PHILADELPHIA KEY INDICATORS

% RECOVERED SINCE 3/22  %YoY
- Outbound Clicks  +348%  -27%
- VisitPhilly Traffic  +137%  -51%
- Hotel Referrals  +1786%  -54%
- Google Searches  +221%  -66%
- Booking Widget Clicks  +799%  -65%

Source: Google Analytics; JackRabbit
STRATEGIC OPPORTUNITIES AHEAD

- Leisure travelers drive recovery: 2021-2022
- “Need periods” every season, every weekend & every day
- Grow the leisure market for the region
- Focus on the traveler’s needs not our industry “wants”
- Defining Success
  - Visitation and ‘heads in beds’
  - Investment in media buy & core customer return
  - New creative & messaging to ‘stand out’
  - Image and retail marketing strategy
  - Stakeholder support and collaboration
STRATEGIC OPPORTUNITIES AHEAD

• An estimated **60 million cancelled international trips** by U.S. residents in 2021 resulting in potentially **120 million new domestic trips**.

• **10% of these trips, 12 million**, are from residents from drive markets in the northeast.
COMPETITIVE DESTINATIONS

Q1 2021 Market Competitive Advertising Spend
### LEISURE TOURISM ADVERTISING SPEND
#### REGIONAL PA/NJ MARKET

#### TOURISM (DMOs)

<table>
<thead>
<tr>
<th>RANK</th>
<th>ADVERTISER</th>
<th>REPORTED SPEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DELAWARE STATE OF TOURISM</td>
<td>$315,323</td>
</tr>
<tr>
<td>2</td>
<td>POCONO MOUNTAINS AREA OF TOURISM</td>
<td>$244,784</td>
</tr>
<tr>
<td>3</td>
<td>FLORIDA KEYS ISLANDS OF TOURISM</td>
<td>$91,548</td>
</tr>
<tr>
<td>4</td>
<td>SOUTH CAROLINA STATE OF TOURISM</td>
<td>$35,635</td>
</tr>
<tr>
<td>5</td>
<td>ISLAMORADA CITY OF TOURISM</td>
<td>$22,944</td>
</tr>
<tr>
<td>6</td>
<td>COROLLA VILLAGE OF TOURISM</td>
<td>$17,452</td>
</tr>
<tr>
<td>7</td>
<td>PHILADELPHIA CITY OF TOURISM</td>
<td>$6,544</td>
</tr>
<tr>
<td>8</td>
<td>CURACAO ISLAND OF TOURISM</td>
<td>$5,315</td>
</tr>
<tr>
<td>9</td>
<td>KEY WEST CITY OF TOURISM</td>
<td>$4,626</td>
</tr>
<tr>
<td>10</td>
<td>MYRTLE BEACH CITY OF TOURISM</td>
<td>$3,166</td>
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#### HOTELS/ RESORTS/ CASINOS/ CRUISES

<table>
<thead>
<tr>
<th>RANK</th>
<th>ADVERTISER</th>
<th>REPORTED SPEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HARD ROCK HOTEL</td>
<td>$145,582</td>
</tr>
<tr>
<td>2</td>
<td>PARX CASINO SPORTSBOOK</td>
<td>$107,706</td>
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<tr>
<td>3</td>
<td>SANDALS RESORT</td>
<td>$97,023</td>
</tr>
<tr>
<td>4</td>
<td>NORWEGIAN CRUISE LINES</td>
<td>$64,977</td>
</tr>
<tr>
<td>5</td>
<td>PARX CASINO</td>
<td>$54,255</td>
</tr>
<tr>
<td>6</td>
<td>SONESTA HOTELS</td>
<td>$24,270</td>
</tr>
<tr>
<td>7</td>
<td>HILTON HOTELS</td>
<td>$22,329</td>
</tr>
<tr>
<td>8</td>
<td>VRBO</td>
<td>$19,680</td>
</tr>
<tr>
<td>9</td>
<td>OCEAN RESORT CASINO</td>
<td>$6,372</td>
</tr>
<tr>
<td>10</td>
<td>NEMACOLIN WOODLANDS RESORT</td>
<td>$5,639</td>
</tr>
</tbody>
</table>

Q1 2021 January – Market Competitive Advertising Spend
Markets include: Philadelphia, Wilkes Barre-Scranton, Harrisburg-Lancaster-Lebanon-York (DMAs)
*does not include paid social media which can represent a significant variance in reporting
## LEISURE TOURISM ADVERTISING SPEND
### EAST COAST DRIVE MARKETS

<table>
<thead>
<tr>
<th>RANK</th>
<th>MARKET (DMA)</th>
<th>REPORTED SPEND</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>NEW YORK</td>
<td>$10MM</td>
</tr>
<tr>
<td>2</td>
<td>PHILADELPHIA</td>
<td>$2MM</td>
</tr>
<tr>
<td>3</td>
<td>WASHINGTON D.C.</td>
<td>$1MM</td>
</tr>
<tr>
<td>4</td>
<td>BOSTON</td>
<td>$470K</td>
</tr>
<tr>
<td>5</td>
<td>BALTIMORE</td>
<td>$217K</td>
</tr>
<tr>
<td>6</td>
<td>HARRISBURG-LANCASTER-LEBANON-YORK</td>
<td>$181K</td>
</tr>
<tr>
<td>7</td>
<td>WILKES-BARRE-SCRANTON</td>
<td>$92K</td>
</tr>
</tbody>
</table>

Q1 2021 January – Market Competitive Advertising Spend
*does not include paid social media which can represent a significant variance in reporting*
NEW YORK CITY

Forbes

7 NYC Valentine’s Day Hotel Offers That Promise Romance And Respite

TRAVEL+ LEISURE

New York to Bring Back Live Theater Through a Series of 300 Pop-up Shows With Hugh Jackman, Billy Porter, Sarah Jessica Parker, and More
Glowing Bridges Will Light up the Emerald Necklace This Winter in Boston

It’s all part of a new program to help Boston residents enjoy the parks despite the cold.
WASHINGTON, D.C.

The Capital of Free Things to Do

Save on your next vacation by visiting a capital city featuring monumental free attractions. Visit DC.

Discover what’s in store for your trip to the nation’s capital

As you plan to safely visit DC with mask and hand sanitizer in tow, read up on the latest coronavirus-related updates on attractions, museums, venues and events across the city.

The Washington Post

D.C. restaurants are hoping for a ‘Biden bump’ after the president’s Georgetown deli visit
Baltimore will know by year's end whether it will host a 2026 World Cup match.
**You're cordially invited to**

**FROM THE BAHAMAS**

**WITH LOVE**

Virtual Romance Expo

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**Last chance**

**10% OFF** + **ALL SAILINGS**

**UP TO $400 ONBOARD CREDIT AND AN EXTRA $100 ON A PRE-PURCHASED BAR TAB**

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**We're giving away 1,000 voyages in the name of love**

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**FALL IN LOVE WITH TRAVEL AGAIN**

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**If the past year has taught us anything, it's how grateful we are for the loved ones in our lives. So this Valentine's Day, we're taking the opportunity to celebrate the people who keep the love alive — essential workers, delivery people, grocery store...**

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**Semi-Annual Sale**

**Up to 45% off rates**

---

**Delano Las Vegas**
PHILADELPHIA’S MEDIA ACCOLADES

Condé Nast Traveler
Fodor’s
TRAVEL + LEISURE
Frommer’s®
Esquire
BEST TRIPS 2020
FOOD & WINE
Welcome

Exclusive Consumer Insights

Essential Marketing Implications

Next Steps with VISIT PHILADELPHIA
EXCLUSIVE CONSUMER INSIGHTS

1. Who’s traveling now?

2. What will they be doing?

3. When will people take their next trip?

4. How are they planning for travel? What’s motivating them?

5. Will they choose Greater Philadelphia, and why?
Travelers in our region are more likely to "stay with friends and family" right now, compared to national travelers (40% vs 25%).

DATA-DRIVEN INSIGHTS

45 Data Inputs

17 Dashboards

Market Performance

Market Forecast

Engagement

Awareness

Intent to Travel
DATA SOURCES & METHODOLOGY

**PROPRIETARY - REGIONAL**

**VISIT PHILADELPHIA®**
Email survey fielded 1/4-1/30, N = 4,058

**Russell RESEARCH**
Omnibus study fielded 1/8-1/15 in PHL, NYC and DC DMAs, N = 779

**Longwoods INTERNATIONAL**
Travel USA survey fielded 2019, N = 1,003

**PUBLIC - NATIONAL**

**Destination Analysts**
U.S. consumer sentiment study fielded 2/19-2/21, N = 1,200+

**Skift RESEARCH**
Travel tracking survey fielded 2/1-2/7, N = 1,000
KEY TAKEAWAYS

1. Optimism around travel and the future of COVID-19 is improving.
2. Many travelers are already in the trip planning process.
3. They want the planning process to be easy.
4. Booking windows have shortened to a week or less.
5. Over half of the travelers in our key drive markets would likely visit Philadelphia in the next year.
7. For the first time, we’re not seeing major differences in diverse markets.
WHAT'S CHANGED?

**FALL 2020**
- Pessimism towards coronavirus outlook
- Beaches #1, small towns growing in popularity
- 50%+ not planning leisure trips until May 2021 or later

**NOW**
- Vaccine developments = Shift towards optimism
- Private residences dropping, hotels rising
- 50%+ planning leisure trip in next 3 months
WHO’S TRAVELING NOW?
As Americans’ optimism about the pandemic improves, so does their readiness to travel.

RECORDS SET THIS WEEK:

• 2021 travel excitement (6.2/10)
• Travel readiness (60%)
• Planning for leisure trip in next three months (53%)
• Optimism about COVID (44%)

Source: Destination Analysts, 2/21
41% of Visit Philly subscribers traveled overnight between October and December.

WHAT WOULD MAKE TRAVELERS MORE COMFORTABLE?

1. Vaccine availability
2. Decreased cases in destination
3. Eased travel restrictions

Base: All respondents
Q: Have you traveled overnight somewhere in the last three months?
The recent leisure traveler looks different from the pre-COVID Greater Philadelphia visitor profile.

**PRE-COVID¹**
- Average age: 48
  *Over a third are 55+
- Average HHI: $75K
- Planning/booking 1-2 months in advance

**DURING COVID²,³**
- 25-54 y/os traveling more frequently
  *And planning next trip sooner
- Even higher HHI ($125k+)
- Booking 1 week or less in advance

¹ Longwoods Overnight Profile 2019
² 2. VP Email Survey
³ Jan 2021
4. JackRabbit
TARGET AUDIENCE

RECENT LEISURE TRAVELERS (RLT)
Taken an overnight trip in the past 3 months
WHAT WILL THEY BE DOING?
Visit Philly subscribers are missing dining out and visiting friends and family most.

While they long for indoor experiences more than outdoor, recent travelers are looking forward to outdoor experiences more than those who haven’t.

Base: All respondents
Q: Using the following activities below to fill in the blank, please describe your level of agreement with the statement: “I am looking forward to __________ once I start traveling again.”
Visit Philly subscribers are open to a variety of destinations. They see themselves traveling to beaches most, but cities and small towns are close behind.

Nationally, cities and small towns have been increasing in interest.

**DEMOGRAPHIC DIFFERENCES:**

- Younger consumers (18-34) prefer small towns over cities
- Cities are #1 for 55+ consumers
- Low HHI (<$50k) least likely to choose cities
- No major differences across ethnicities
Two-thirds of Visit Philly subscribers would stay in paid accommodations if visiting the region.

Philadelphia DMA travelers are more likely to take a day trip, but still, over half would stay overnight in paid accommodations.

**DEMOGRAPHIC DIFFERENCES:**

- Younger travelers more likely to stay in Airbnb
- Travelers 35+ show higher preference for traditional hotels

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*Base: All respondents
Q: When you think about traveling to Greater Philadelphia in the next 6 months, what does that trip look like to you?
WHEN WILL THEY TAKE THEIR NEXT TRIP?
Nationally, future travel intentions are impacted by vaccine expectations.

The majority of Americans continue to believe they will be vaccinated from COVID-19 by this summer.

This is reflected in the timing of their trip plans, including a notable spike in July and consistency in the months following.
Visit Philly subscribers plan on traveling even sooner—over half expect to take their next trip before June.

Recent travel increases eagerness to travel again. At the time of surveying, over a third of those who traveled recently saw themselves taking another trip within two months, compared to only 18% of those who hadn’t.

![Chart showing travel plans by month]

*Base: All respondents
Q: Even if you only have tentative plans, in what month could you see yourself taking your next leisure trip?*
HOW ARE THEY PLANNING FOR FUTURE TRAVEL?
Regardless of when they’ll go, a quarter of Visit Philly subscribers are planning now.

Similarly, recent travelers are more likely to be planning their next trip sooner.

Those that have not traveled recently are pushing their planning to 3+ months.
This eagerness towards future travel is also taking place nationally.

American travelers remain highly open to travel inspiration and the potential influence of travel advertising.

Half of those who will travel in the next 3 months say their trip isn’t well developed yet, signifying an opportunity to be swayed on their decision.
Visit Philly subscribers are turning to destination sites, family and friend recommendations, and online review sites to inspire travel.

DEMOGRAPHIC DIFFERENCES:

- Younger travelers (18-34) more likely to use word of mouth and social media
- Travelers 55+ and higher HHI (>$100k) more likely to use travel magazines
Travelers are looking for a variety of information when deciding where to travel.

Things that make travel planning easy during COVID hold higher weight than usual website content.

Base: All respondents
Q: Please rate how important the following things are in helping decide where to travel
WILL THEY CHOOSE GREATER PHILADELPHIA & WHY?
Over half of the travelers in our key drive markets would likely visit Philadelphia in the next year.

People continue to feel most comfortable taking trips close to home.

CONSIDERATIONS:

- American travelers planning an average of 2.7 trips in 2021
- All DMAs showed double-digit increases in likelihood to visit Philadelphia since September

Base: All respondents
Q: How likely are you to visit the following destinations for a leisure trip in the next 12 months?
Of those likely to visit, historic sites attract them here most.

Our **fun food and drink scene and museums** also top the list, especially among the Philadelphia DMA.

Both the Philadelphia and DC DMAs are also attracted to our **authentic food experiences**.
Our dining options are perceived best by Visit Philly subscribers, but other strengths differ between Center City and the rest of the region.

**CENTER CITY**
1. Dining
2. Indoor attractions
3. Indoor events

**BUCKS, CHESTER, DELAWARE + MONTGOMERY COUNTIES**
1. Dining
2. Parks/hiking trails
3. Shopping
National preferences are in line with their relative strengths in the region.

For city-goers, the variety of experiences and energy is part of the draw, while travelers that prefer small towns enjoy peace and quiet, scenic beauty, escape from crowds and a relaxing atmosphere.

### CITY PREFERENCES

<table>
<thead>
<tr>
<th>Preference</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food experiences</td>
<td>49.0%</td>
</tr>
<tr>
<td>Shopping opportunities</td>
<td>40.0%</td>
</tr>
<tr>
<td>Energy and excitement</td>
<td>39.0%</td>
</tr>
<tr>
<td>Cultural offerings</td>
<td>35.2%</td>
</tr>
<tr>
<td>Specific attraction(s)</td>
<td>30.7%</td>
</tr>
</tbody>
</table>

### SMALL TOWN/RURAL PREFERENCES

<table>
<thead>
<tr>
<th>Preference</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peace and quiet</td>
<td>60.2%</td>
</tr>
<tr>
<td>Scenic beauty</td>
<td>59.6%</td>
</tr>
<tr>
<td>Escape from crowds</td>
<td>59.1%</td>
</tr>
<tr>
<td>Relaxing atmosphere</td>
<td>57.7%</td>
</tr>
<tr>
<td>Charm and ambiance</td>
<td>41.8%</td>
</tr>
<tr>
<td>Proximity to nature</td>
<td>41.4%</td>
</tr>
</tbody>
</table>

Source: Destination Analysts, 1/24
The biggest unknown is still the traveler. Sometimes sentiment differs from actual behavior.

According to Skift’s Travel Tracker, **cities and small town destinations** have outpaced beaches since October. Small town stays are connected to visits to friends or family, which both dropped after the holiday season.
Things are looking up. Travel plans continue to grow.

Travelers want the process to be easy – transparent, upfront travel expectations are most helpful.

There are subtle but important differences between markets:
- Local markets
- Repeat visitors
- Young and wealthy travelers
- People with friends and family in Philadelphia

People are looking for a variety of options – food experiences, historic attractions, and outdoor activities rank highest in Greater Philadelphia.

**SUMMARY**
Welcome

Exclusive Consumer Insights

Essential Marketing Implications

Next Steps with VISIT PHILADELPHIA
ESSENTIAL MARKETING IMPLICATIONS

1. The Time is Coming to Act, Not Pull Back.

2. Keep It Simple, Make It Easy. Across Every Touchpoint.

3. Tailor Messaging to the Audience.

4. Create Celebration Occasions that Give People Permission to Reconnect With Each Other.

5. Stay Nimble & Keep Listening.
Welcome

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Essential Marketing Implications

Next Steps with VISIT PHILADELPHIA
NEXT STEPS WITH VISIT PHILADELPHIA

Data sharing and insights
Survey collaboration
Joint Marketing Program

For latest research and insights:
visitphilly.com/research
For questions, contact:

Mackenzie Radice
Research & Analytics Manager
mackenzie@visitphilly.com