



# Philadelphia & The Countryside 2017 Visitor Research



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# Introduction

- ✓ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ✓ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ✓ It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ✓ This report provides an overview for Philadelphia & The Countryside's **domestic** tourism business in 2017.

# Research Objectives

- ✓ The visitor research program is designed to provide:
  - ✓ Estimates of domestic overnight and day visitor volumes to Philadelphia & The Countryside.
  - ✓ A profile of Philadelphia & The Countryside's performance within its overnight travel market.
  - ✓ Domestic visitor expenditures in Philadelphia & The Countryside.
  - ✓ Profiles of Philadelphia & The Countryside's day travel market.
  - ✓ Relevant trends in each of these areas.

# Methodology

- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel **USA**® survey:
  - Selected to be representative of the U.S. adult population
- For the 2017 travel year, this yielded :
  - 329,470 trips for analysis nationally:
    - 232,317 overnight trips
    - 97,153 day trips
- For Philadelphia & The Countryside, the following sample was achieved in 2017:
  - 2,751 trips:
    - 1,841 overnight trips, of which 1,522 were *leisure trips*
    - 910 day trips, of which 824 were *leisure trips*
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



## Key Findings



# Key Findings

- In 2017, Philadelphia & The Countryside had 44.1 million person trips, increasing 2.2% from 2016. 37% were overnight trips and 63% were day trips.
- The overnight trips generated \$3.1 billion in spending, increasing 2.6% from 2016.
- “Visiting friends and relatives” (at 52%) was the most frequent purpose for an overnight trip to Philadelphia & The Countryside. Marketable trips (those influenced by marketing efforts) were 28% of total overnight trips, with the most prevalent trip type being attending a special event.
- The top states of origin for overnight leisure trips to Philadelphia & The Countryside visitors were Pennsylvania, New York, and New Jersey. The top DMAs of origin were New York City, Philadelphia, and Washington DC.

# Key Findings (Cont'd)

- Almost 3 of every 4 (73%) overnight leisure visitors to Philadelphia & The Countryside were very satisfied with their overall trip experience. The next highest-ranking categories for satisfaction were quality of food (67%) and quality of accommodations (62%).
- Among those on overnight leisure trips to Philadelphia & The Countryside, 85% have visited at least once before and 63% have visited in the past year.
- Leisure trips to Philadelphia have a shorter planning horizon than the national norm, with 59% being planned 2 months or less before the trip vs 50% nationally. Similar to the national average, 15% of trips were taken with no advance planning.
- Online travel agencies, advice from relatives or friends, and hotel or resort were the most common planning sources for a Philadelphia & The Countryside overnight leisure trip. Hotel or resort was the most common booking source.



# Key Findings (Cont'd)

- The average number of nights spent in Philadelphia & The Countryside for an overnight leisure trip was 2.7 nights, the same as in 2016. The average travel party size was 2.7 persons.
- Over seventy-percent (72%) of overnight Philadelphia & The Countryside travelers arrived by personal car or truck.
- The top five activities and experiences during an overnight leisure trip to Philadelphia & The Countryside were shopping, fine dining, landmark/historical site visits, museum visits and going to a bar or nightclub.

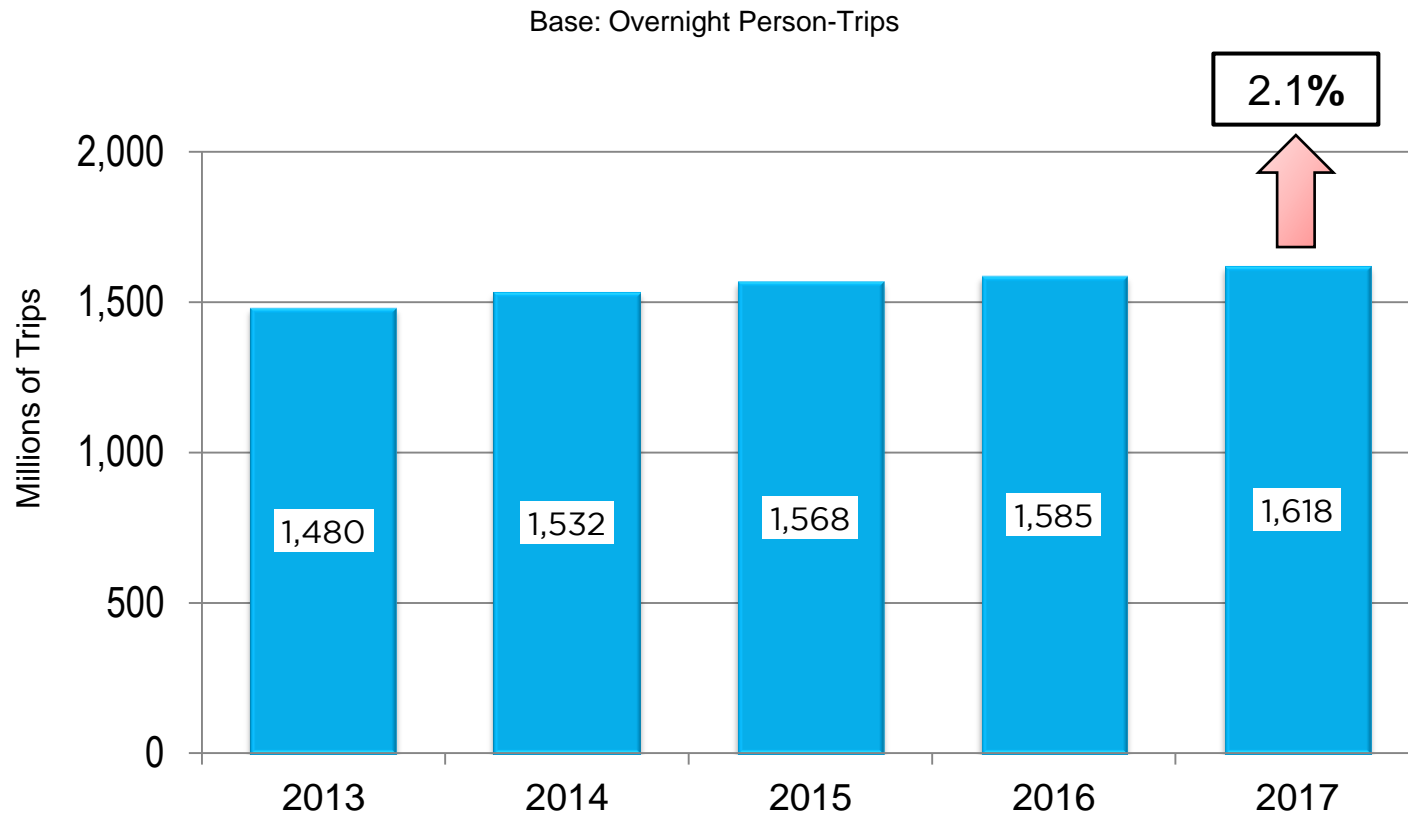


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40 YEARS TOGETHER

## Size & Structure of the U.S. Travel Market

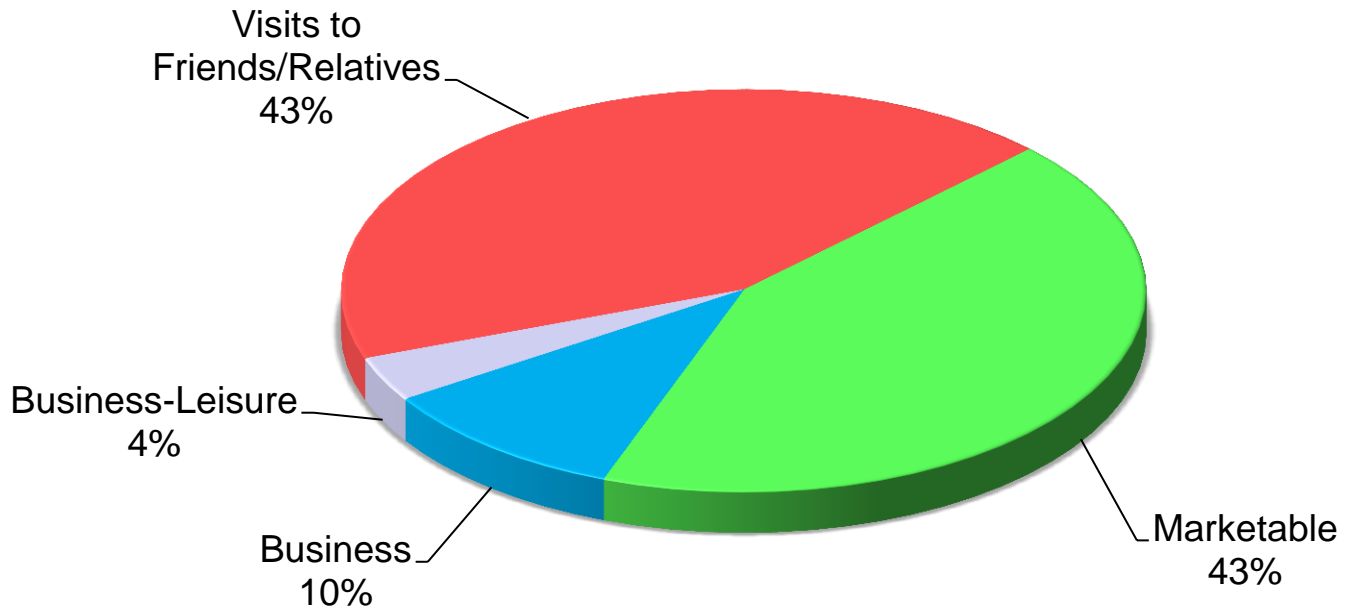


# Total Size of the U.S. Travel Market — 2013-2017



# Structure of the U.S. Travel Market — 2017 Overnight Trips

Base: Overnight Person-Trips



# U.S. Market Trends for Overnight Trips — 2017 vs. 2016





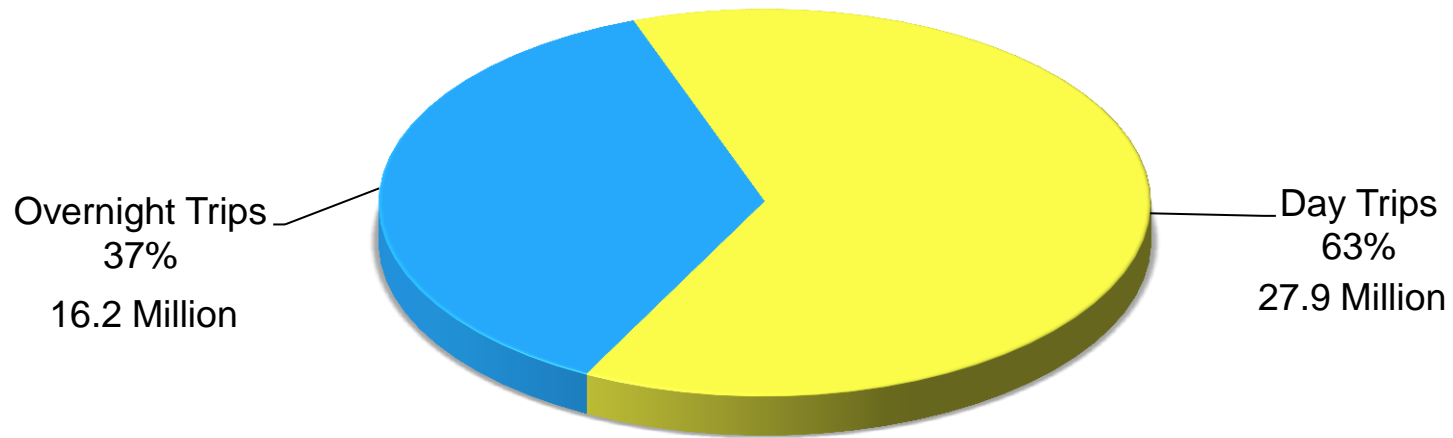
## Size & Structure of Philadelphia & The Countryside Domestic Travel Market



# Total Size of Philadelphia & The Countryside 2017 Domestic Travel Market

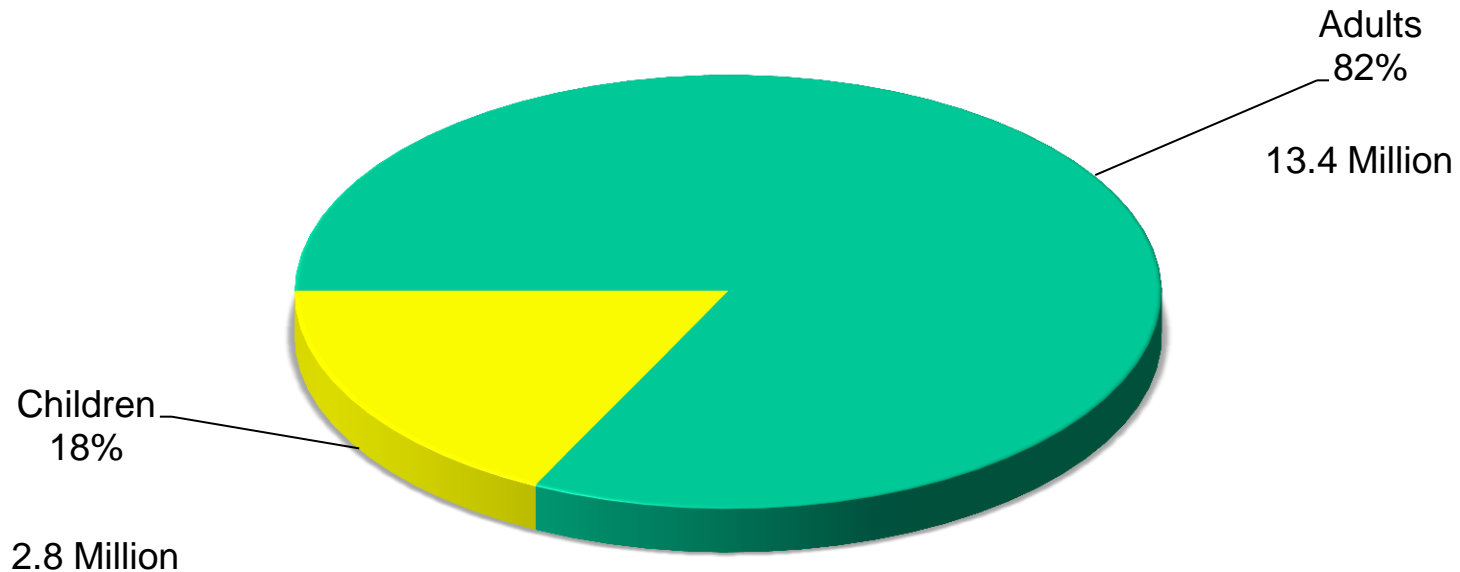
Total Person-Trips = 44.1 Million

+2.2% vs. 2016



# Size of Philadelphia & The Countryside Overnight Travel Market — Adults vs. Children

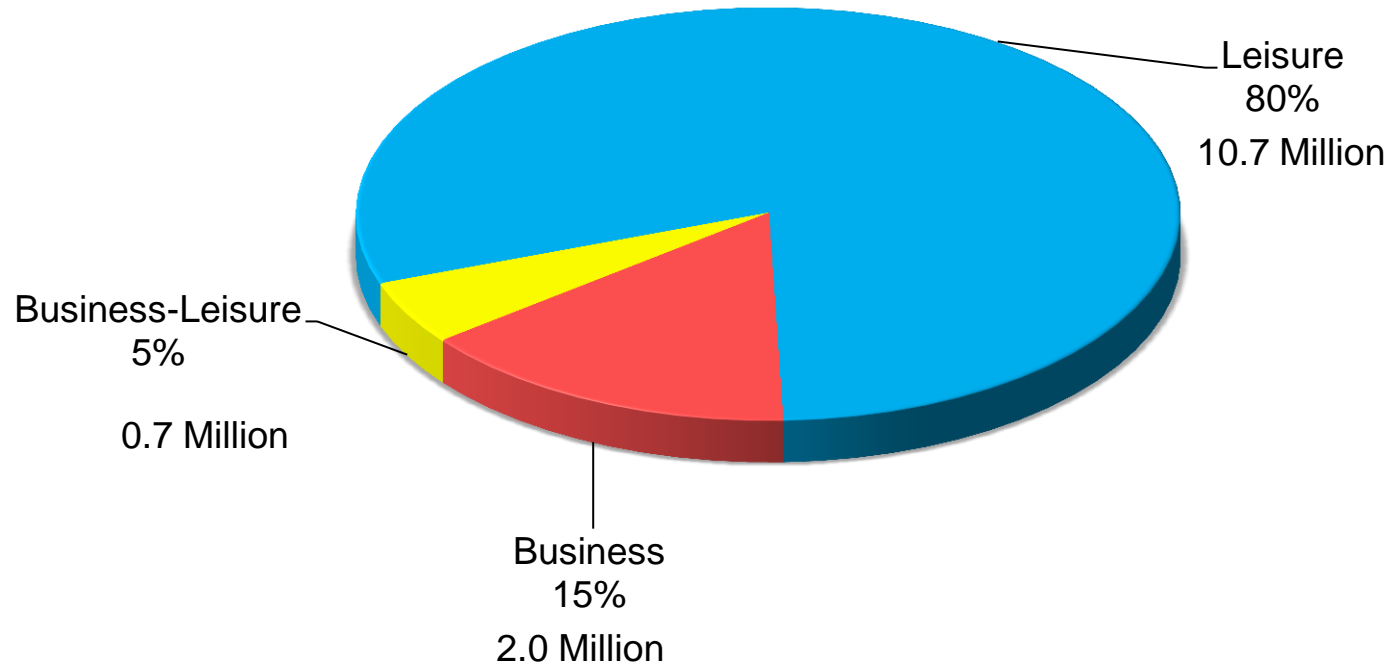
Total Overnight Person-Trips = 16.2 Million





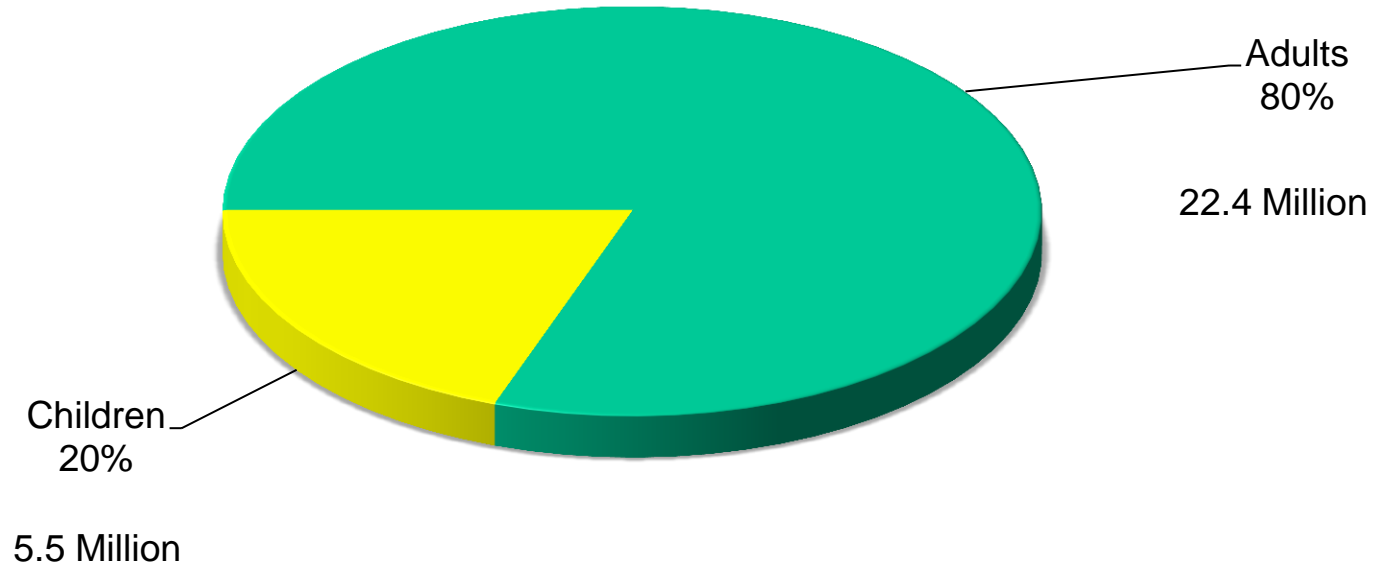
# Philadelphia & The Countryside Overnight Travel Market — by Main Trip Purpose

Adult Overnight Person-Trips = 13.4 Million



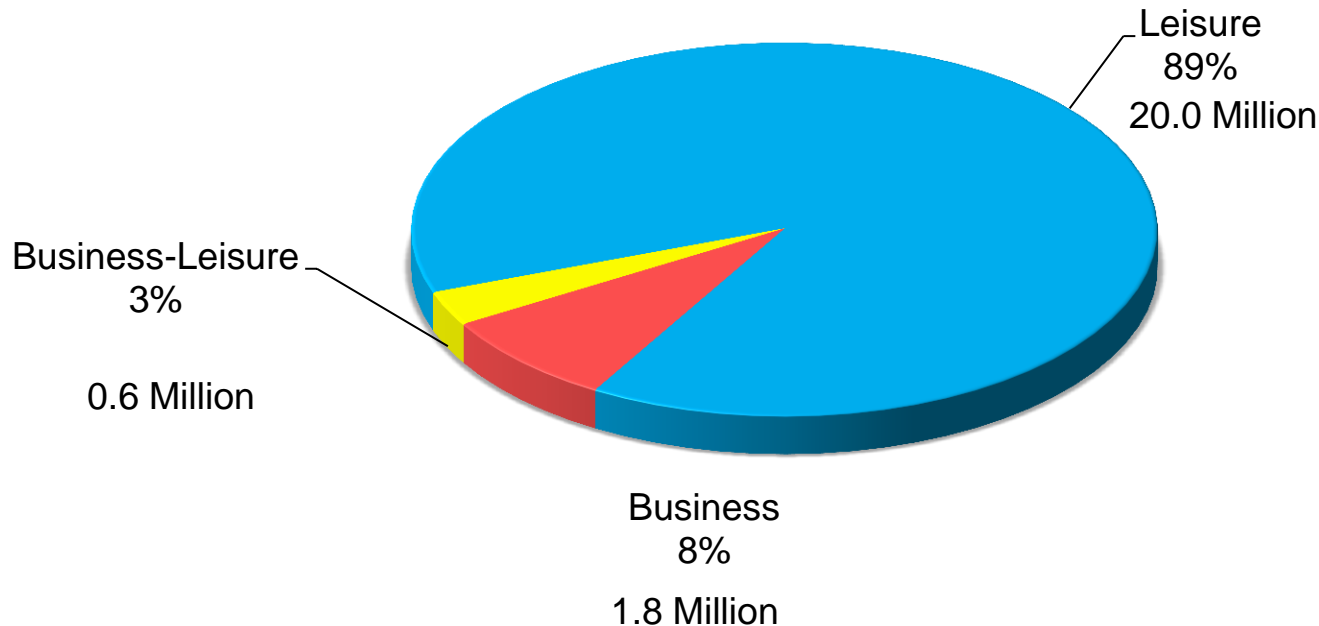
# Size of Philadelphia & The Countryside Day Travel Market — Adults vs. Children

Total Day Person-Trips = 27.9 Million



# Philadelphia & The Countryside Day Travel Market — by Trip Purpose

Adult Day Person-Trips = 22.4 Million





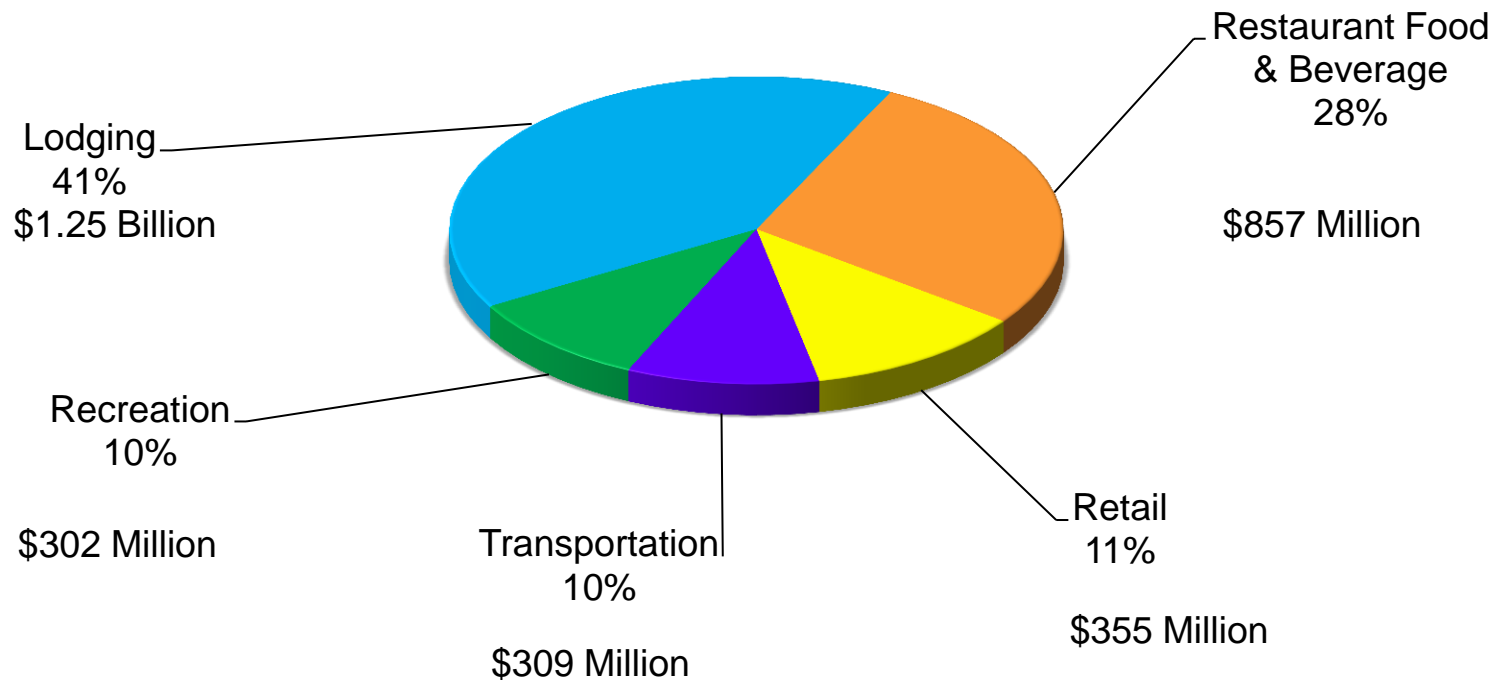
# Overnight Trip Expenditures



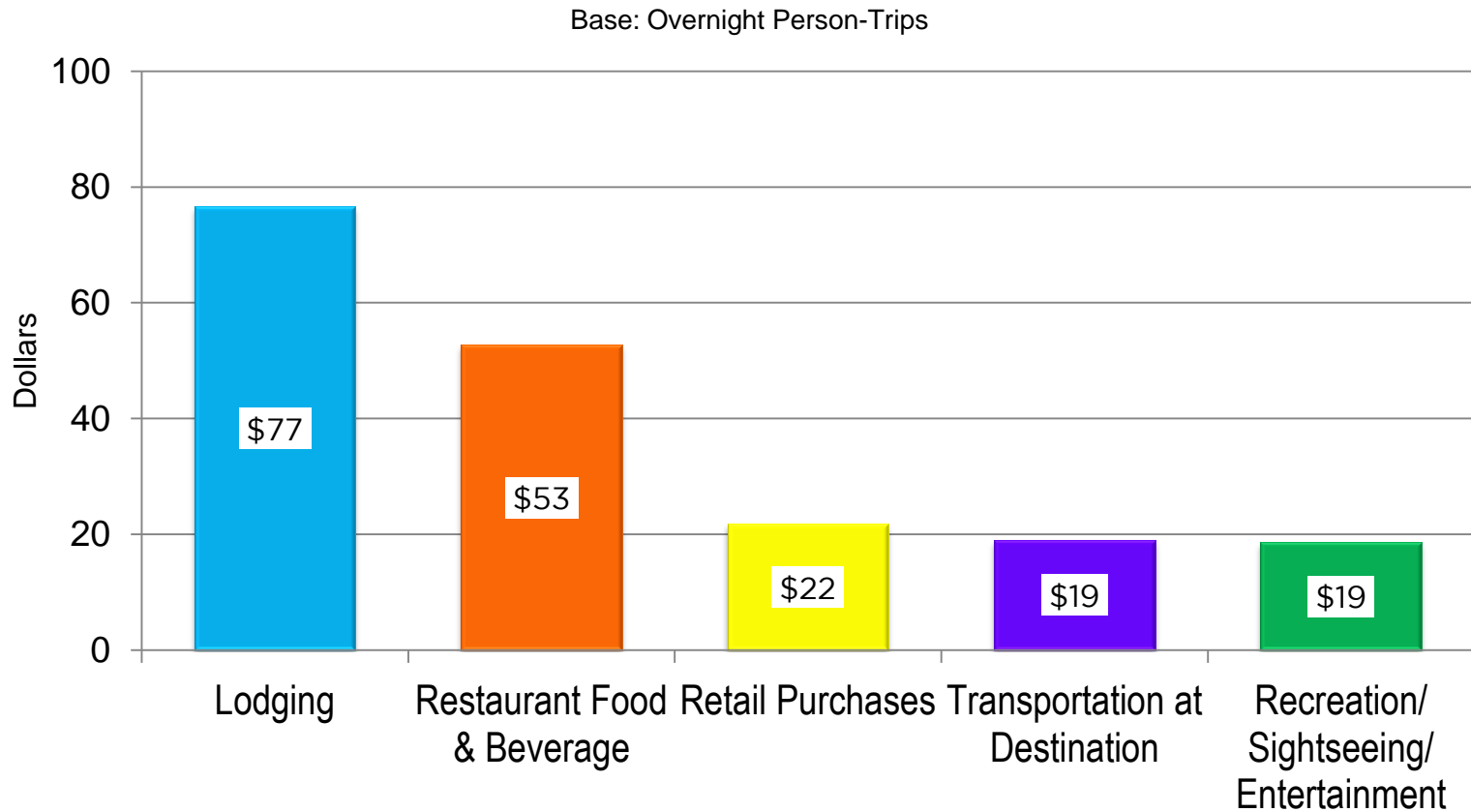
# Domestic Overnight Expenditures — by Sector

Total Spending = \$3.1 Billion

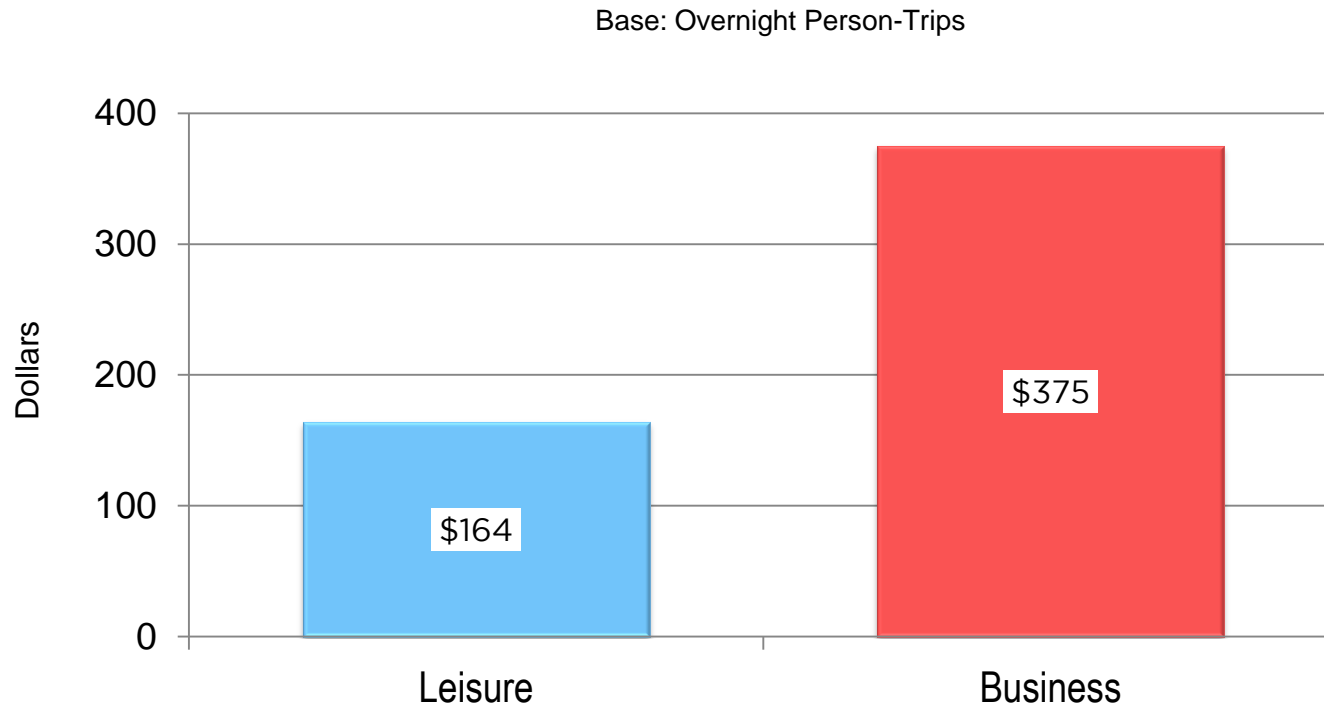
+2.6% vs. 2016



# Average Per Person Expenditures on Domestic Overnight Trips — By Sector



# Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose





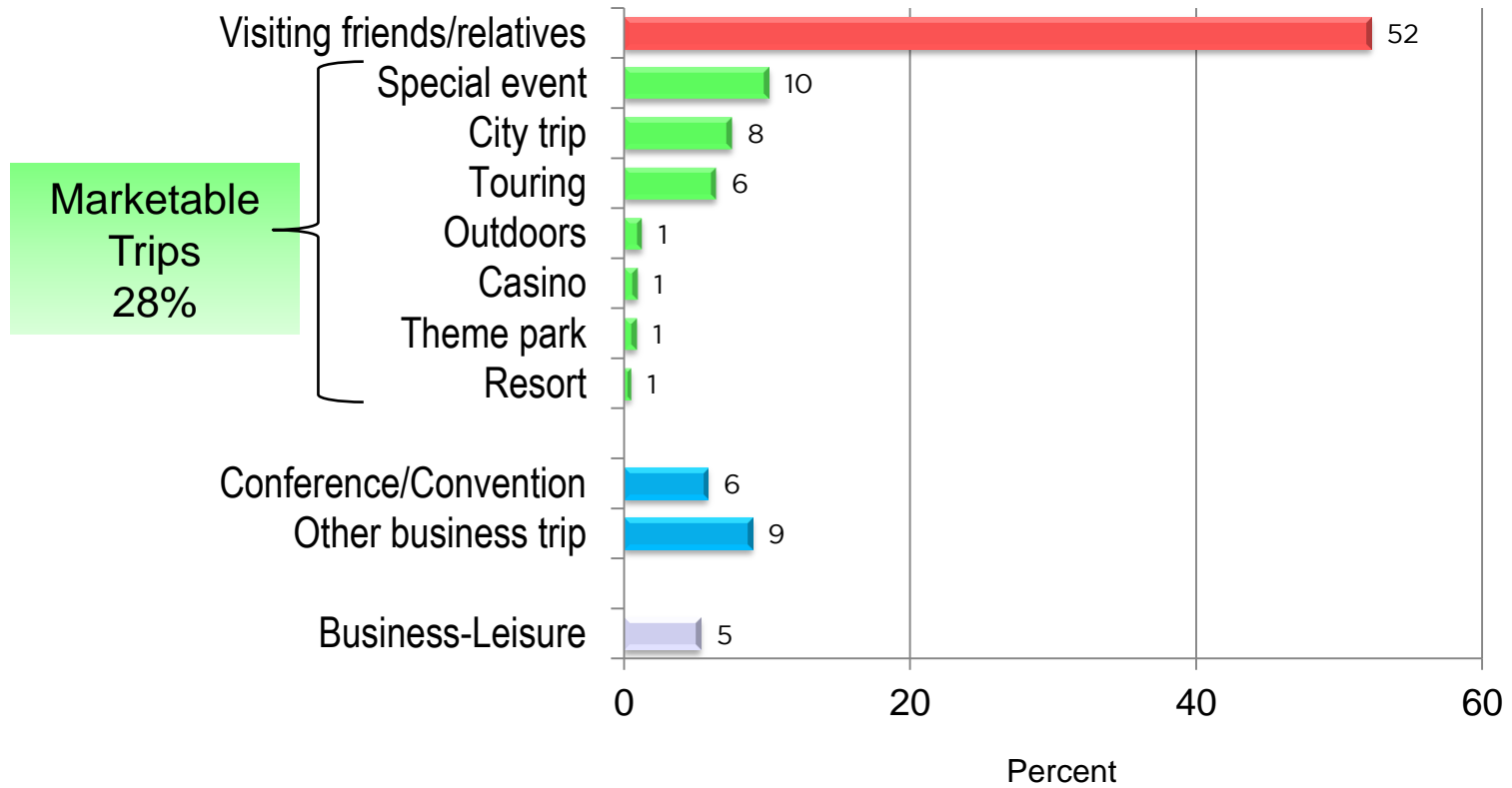
## Overnight Trip Characteristics



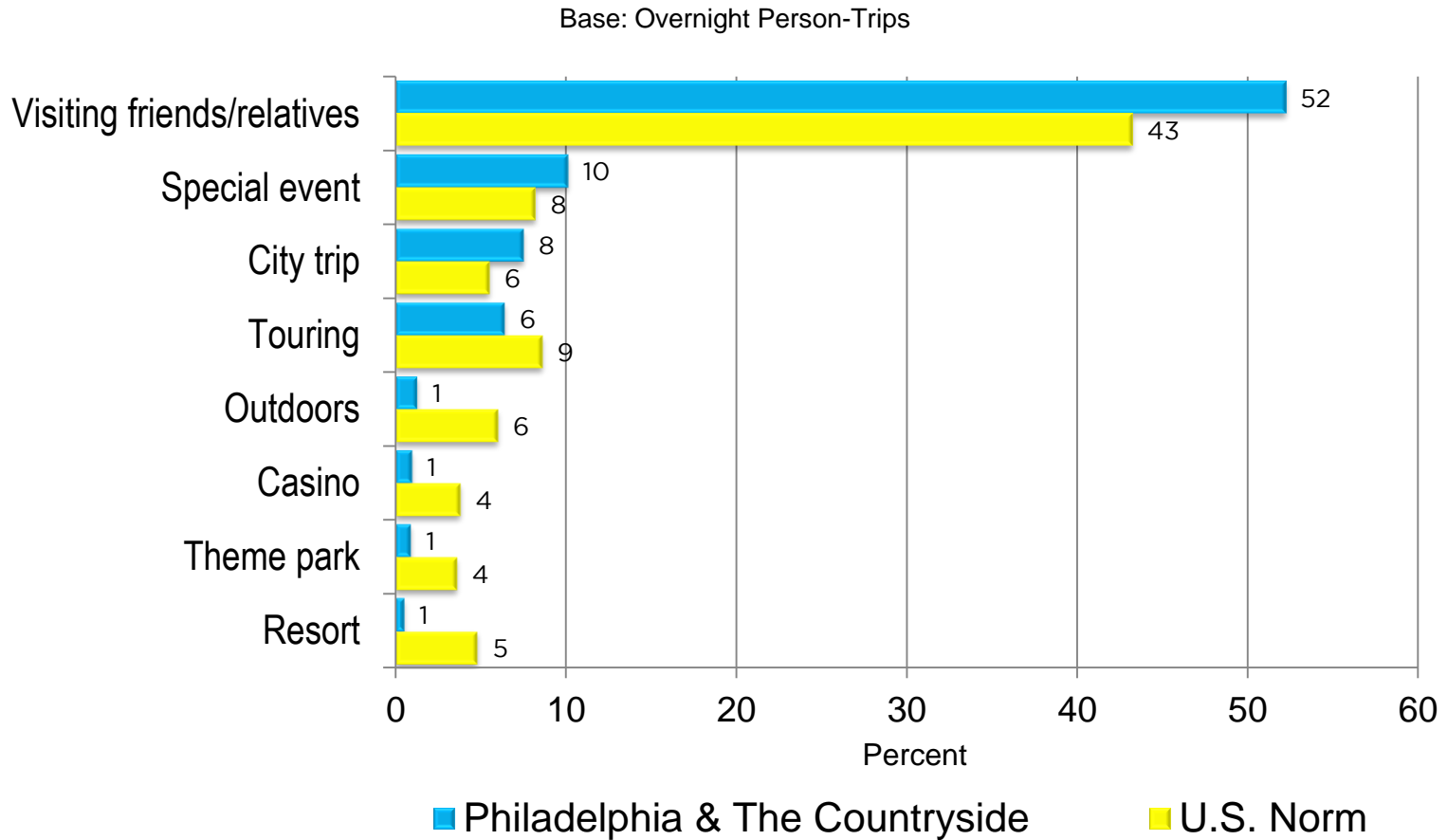


# Main Purpose of Trip

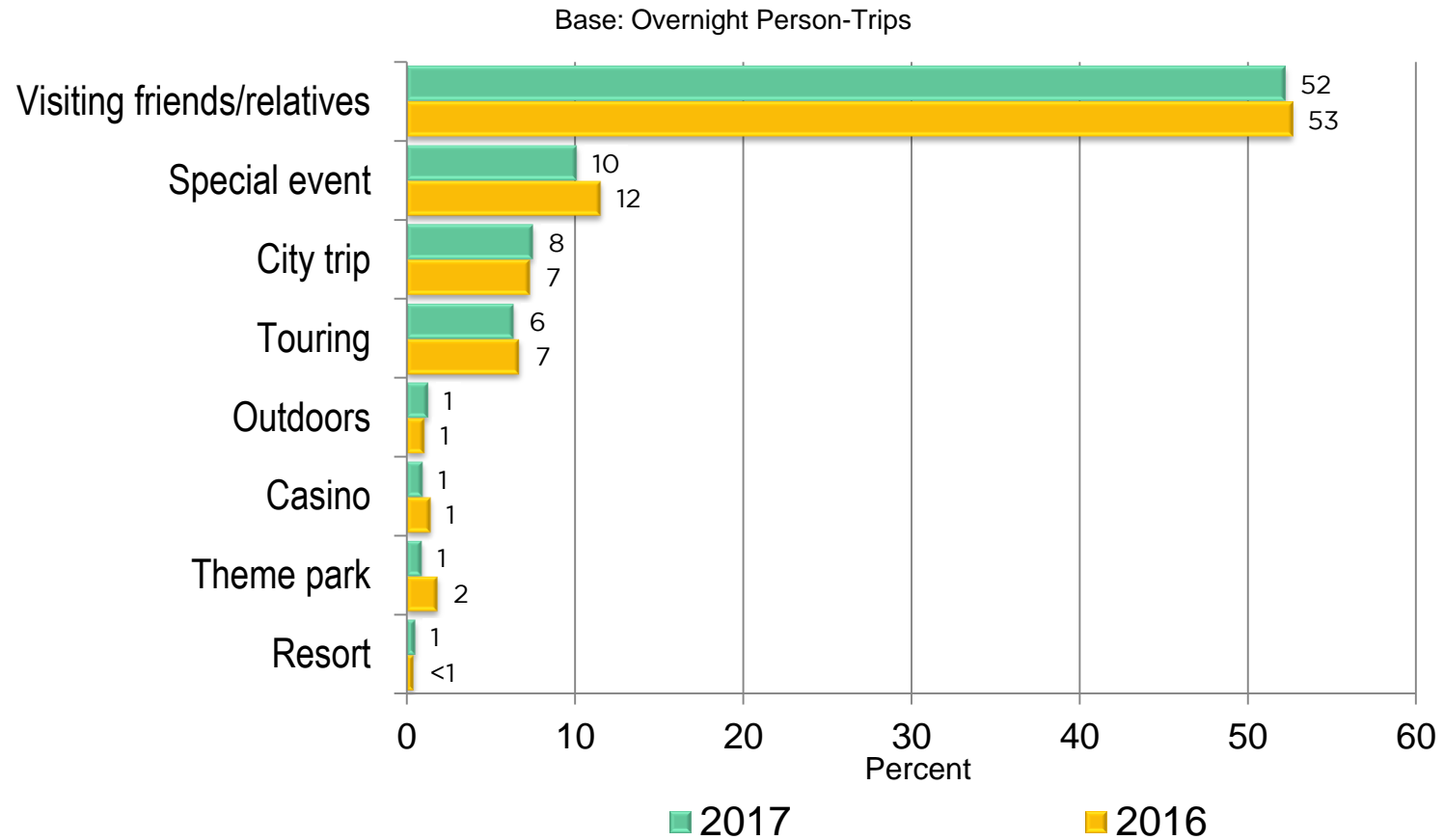
Base: Overnight Person-Trips



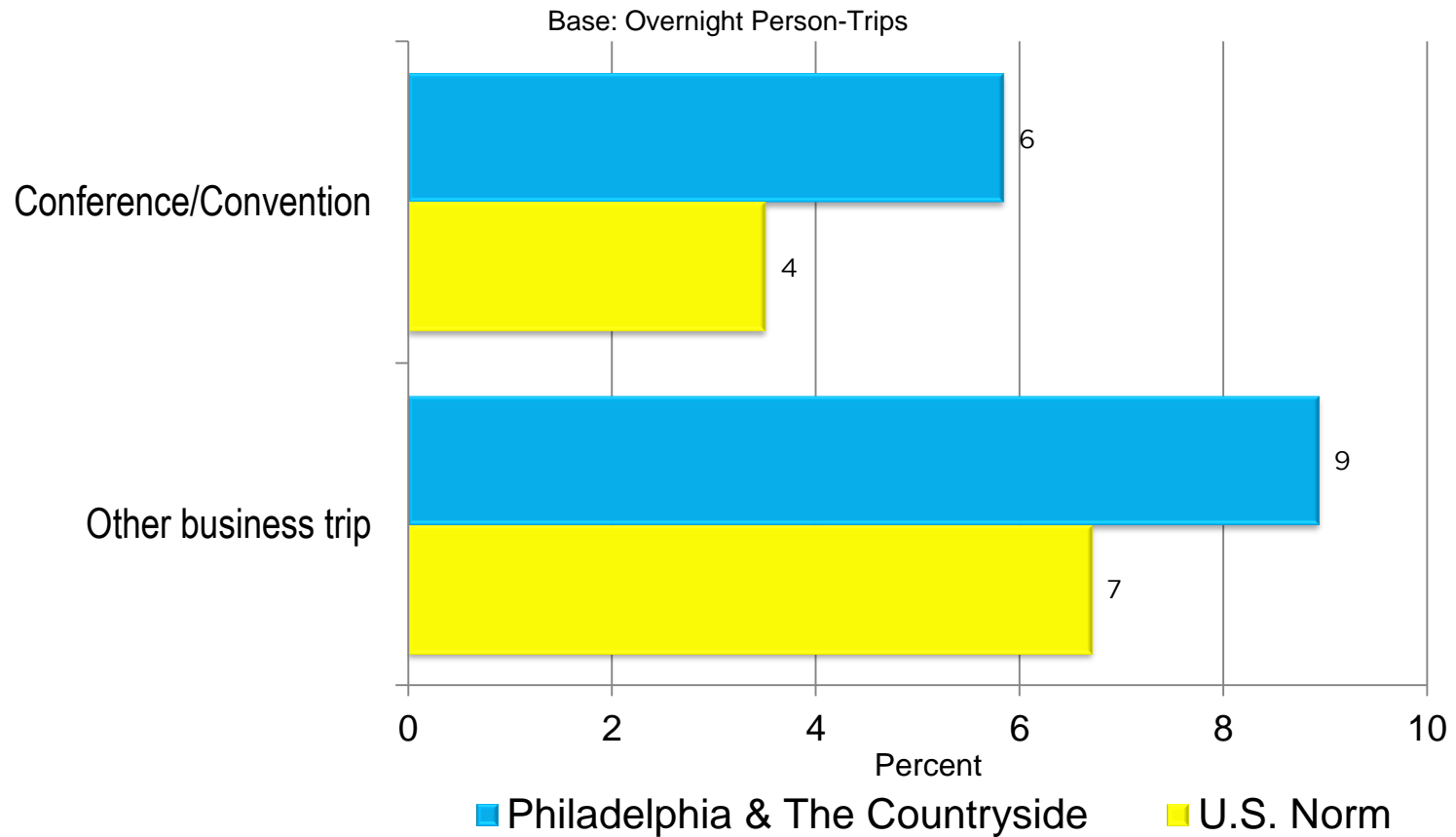
# Main Purpose of Leisure Trip



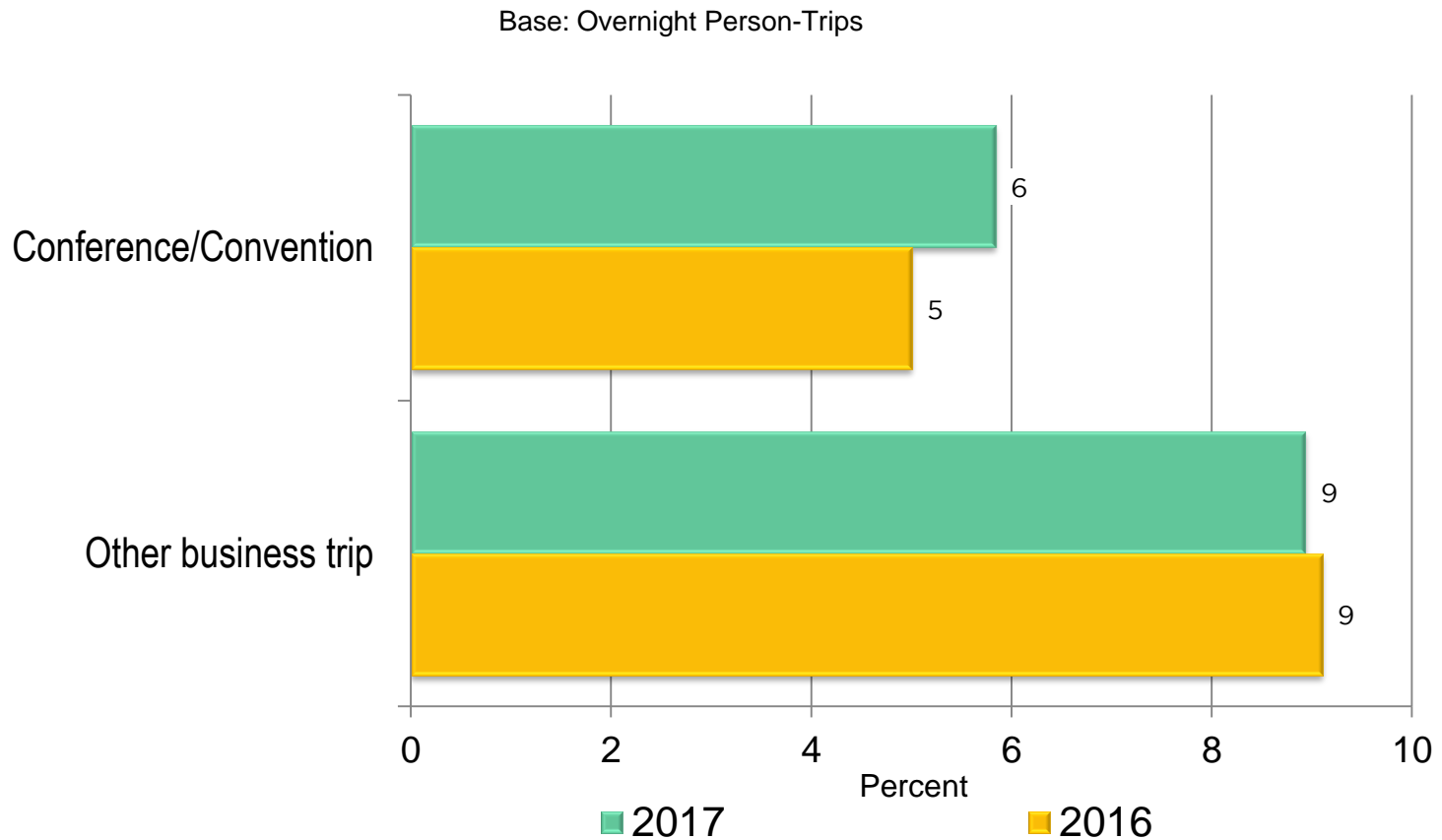
# Main Purpose of Overnight Leisure Trip — 2017 vs. 2016



# Main Purpose of Business Trip

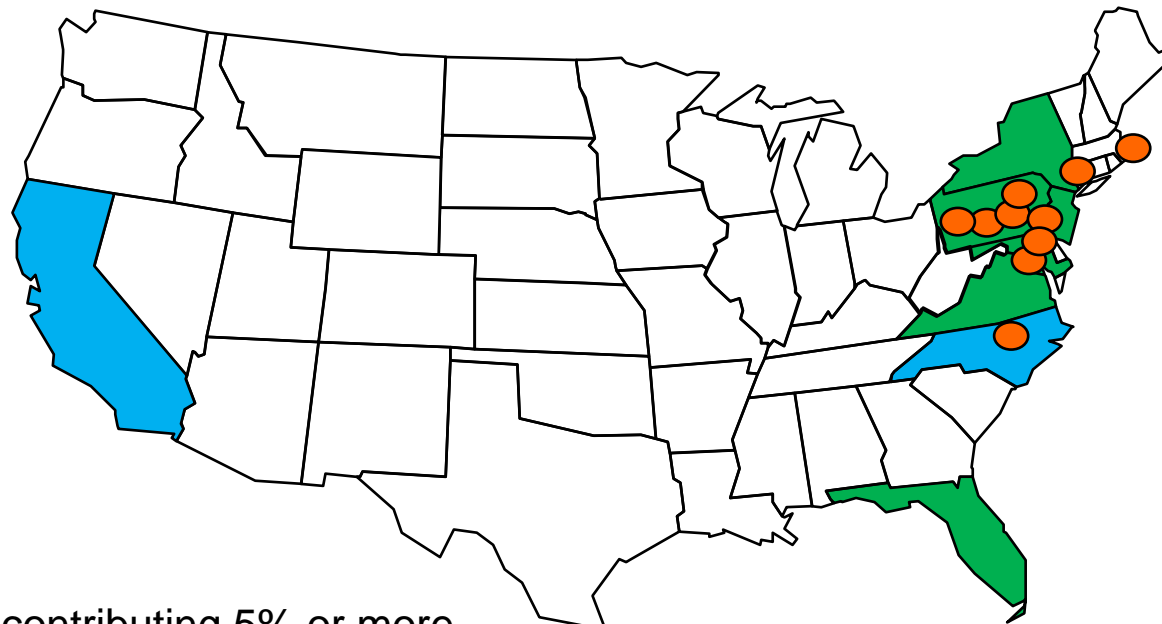


# Main Purpose of Overnight Business Trip — 2017 vs. 2016



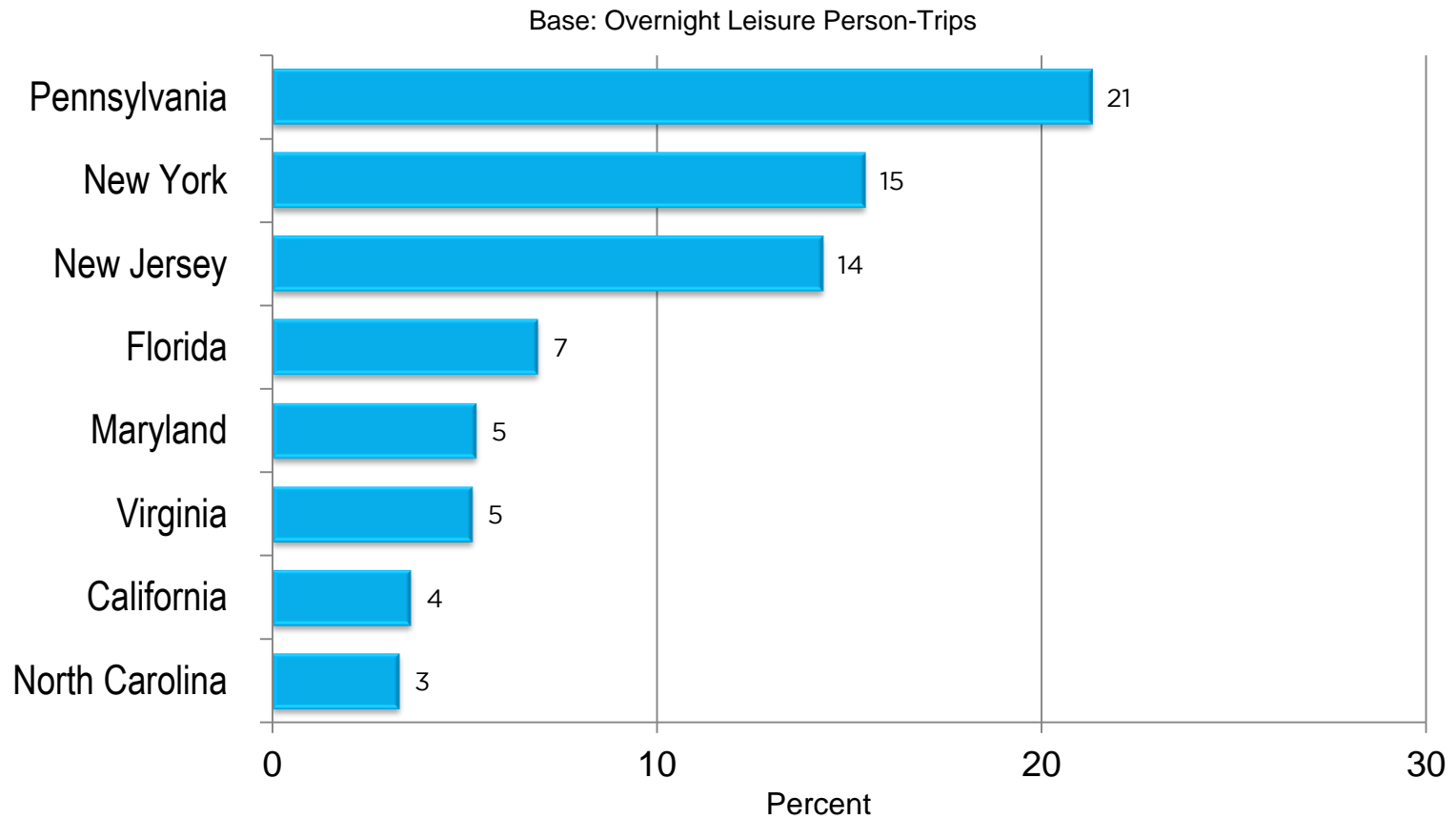
# Sources of Business

Base: Overnight Leisure Person-Trips



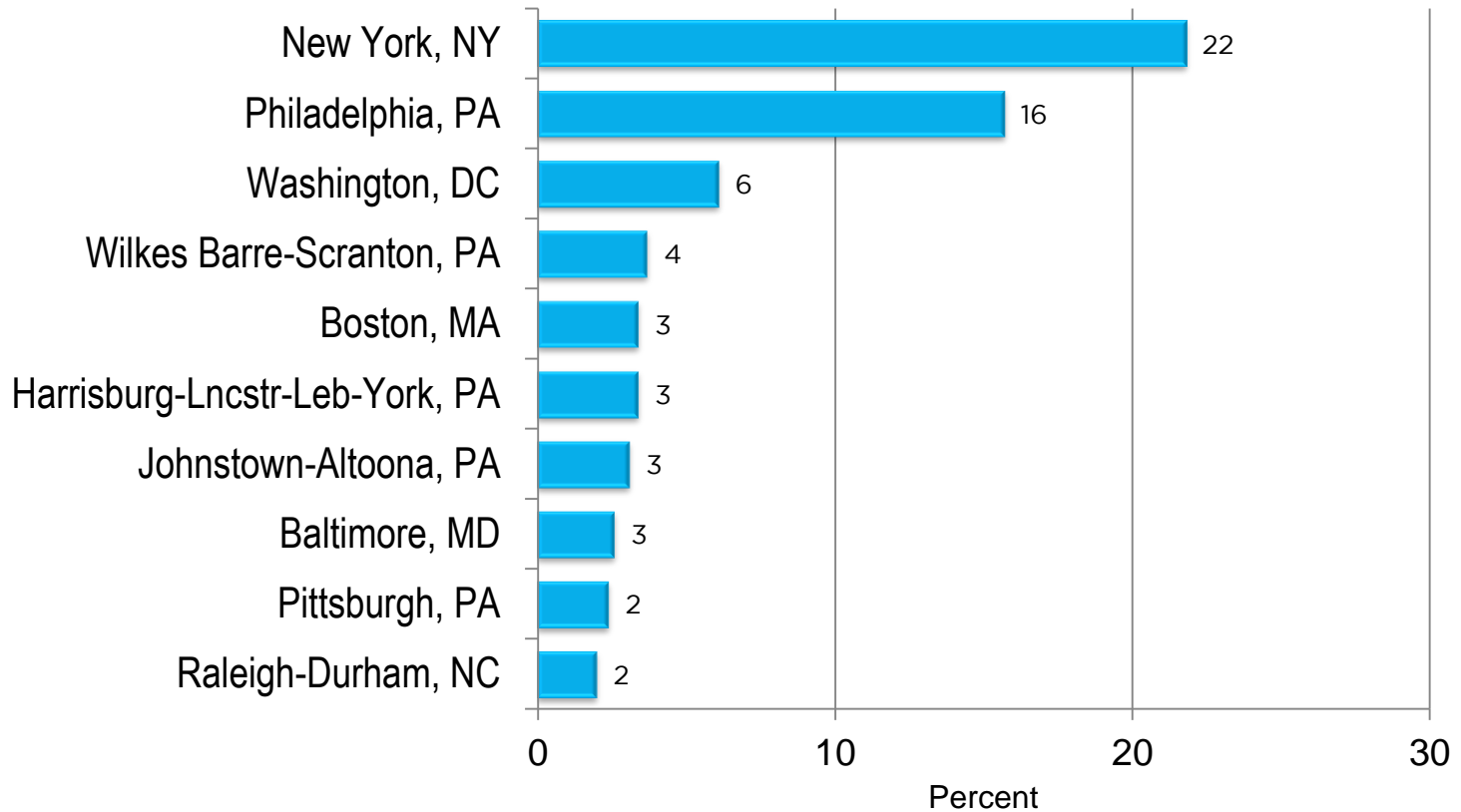
- States contributing 5% or more
- States contributing 3% - 5%
- DMA's contributing more than 2%

# State Origin Of Trip



# DMA Origin Of Trip

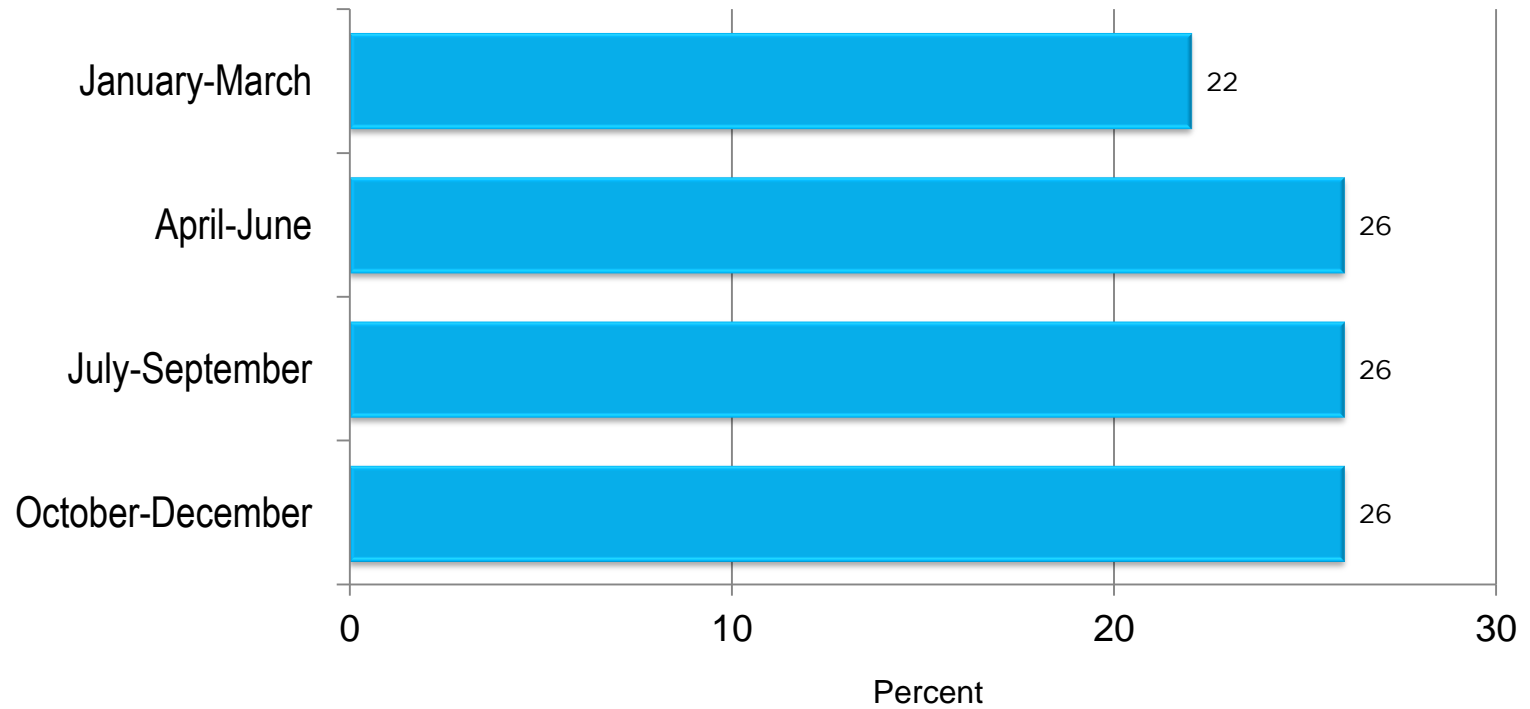
Base: Overnight Leisure Person-Trips



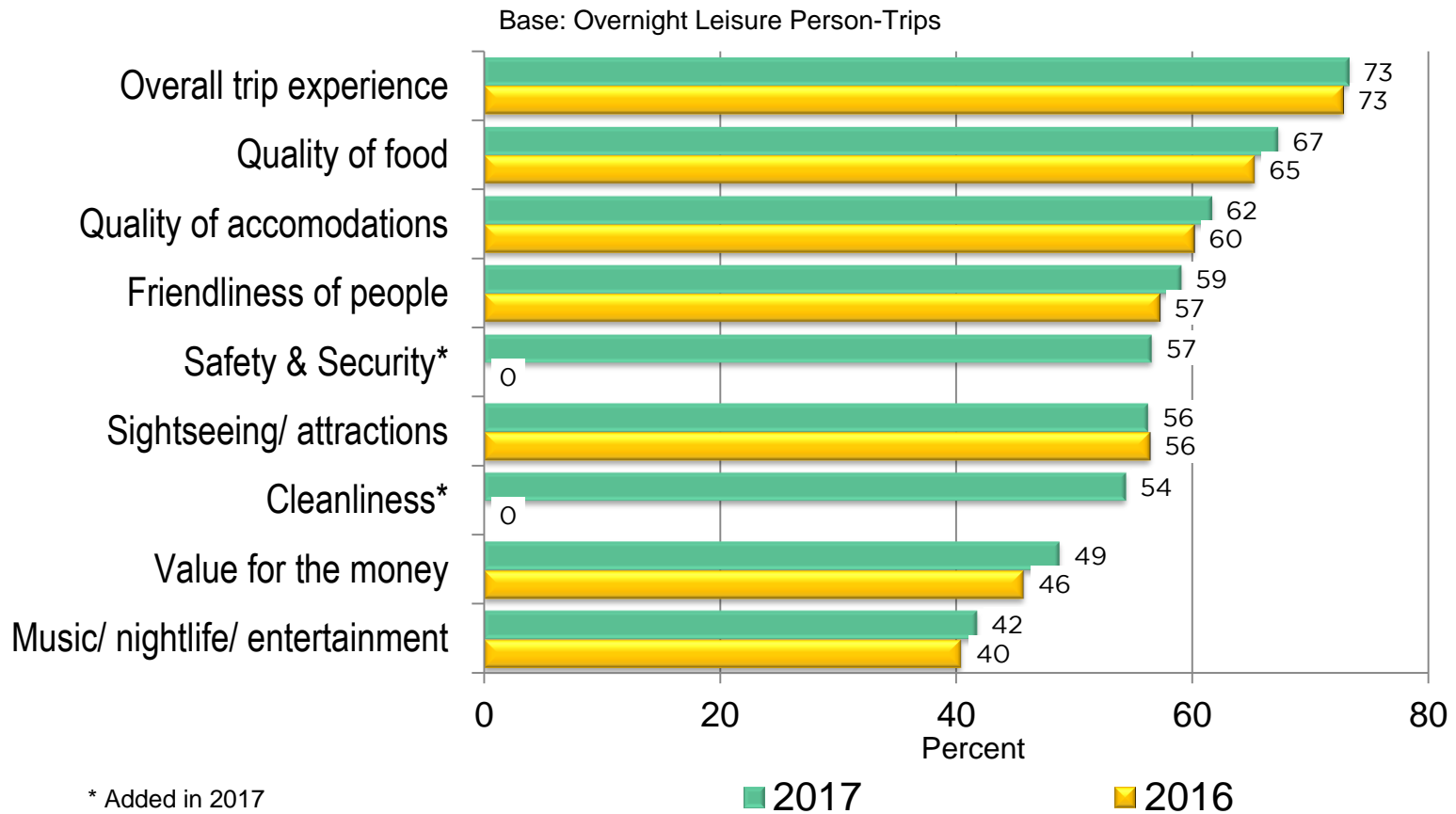


# Season of Trip

Base: Overnight Person-Trips

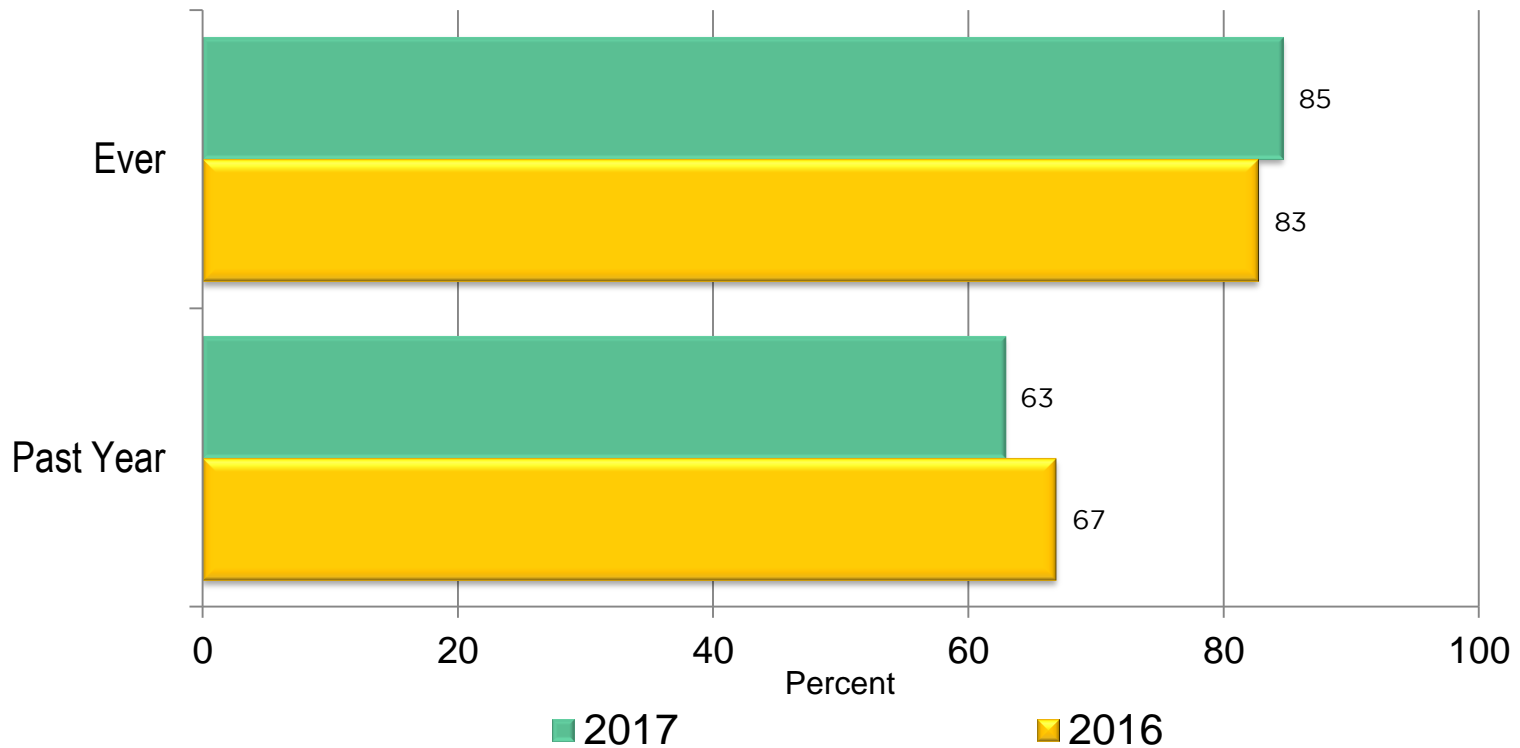


# % Very Satisfied with Trip



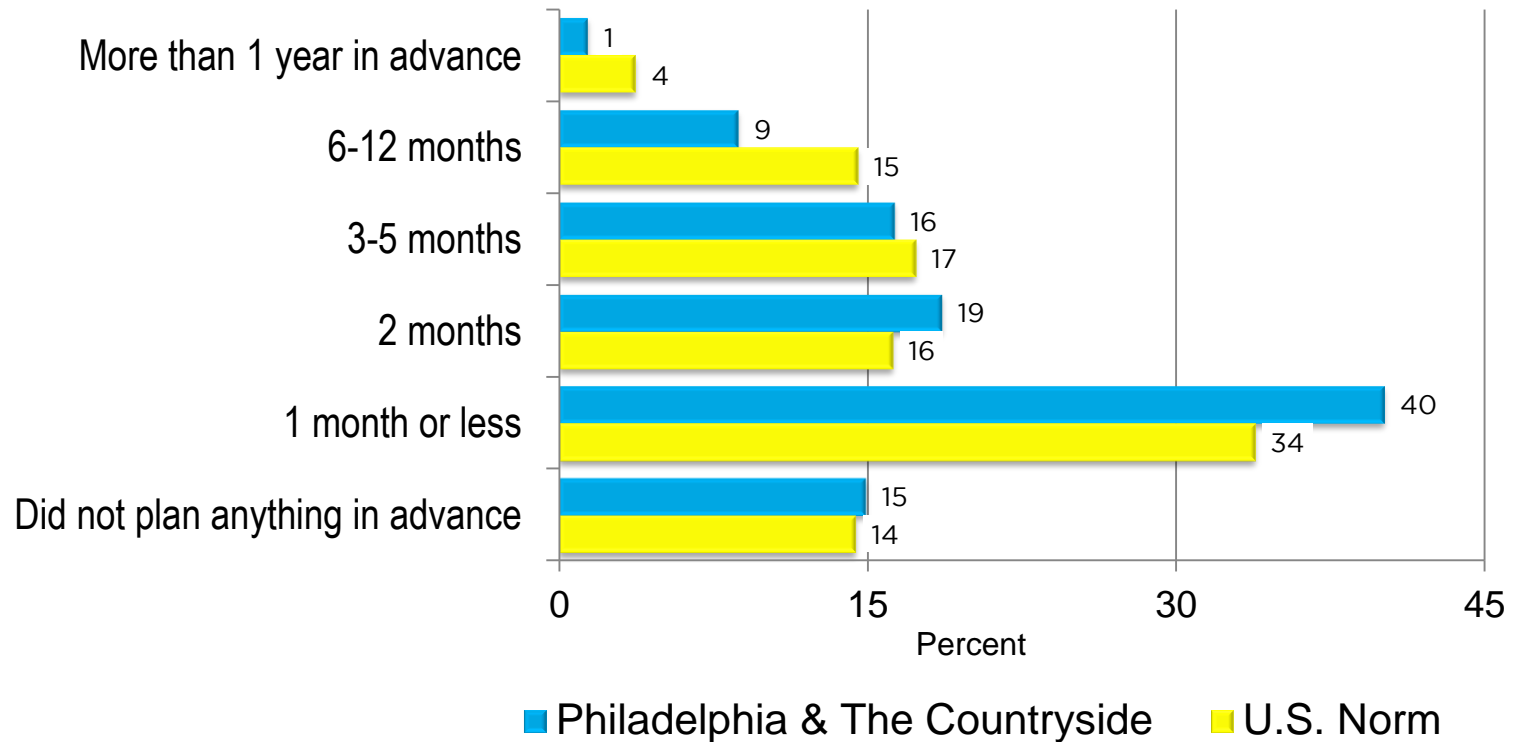
# Past Visitation to Philadelphia & The Countryside

Base: Overnight Leisure Person-Trips



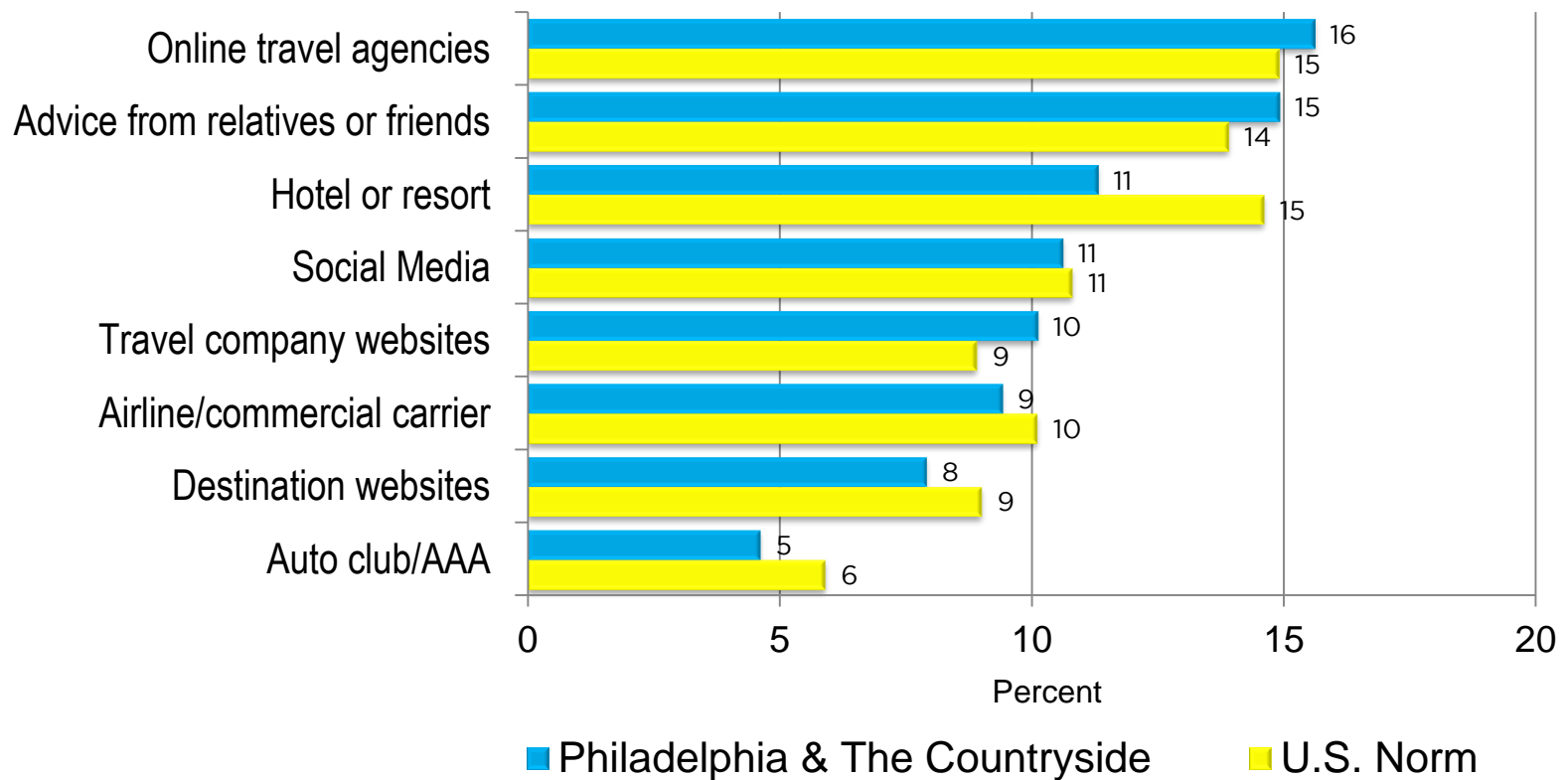
# Length of Trip Planning

Base: Overnight Leisure Person-Trips



# Trip Planning Information Sources

Base: Overnight Leisure Person-Trips

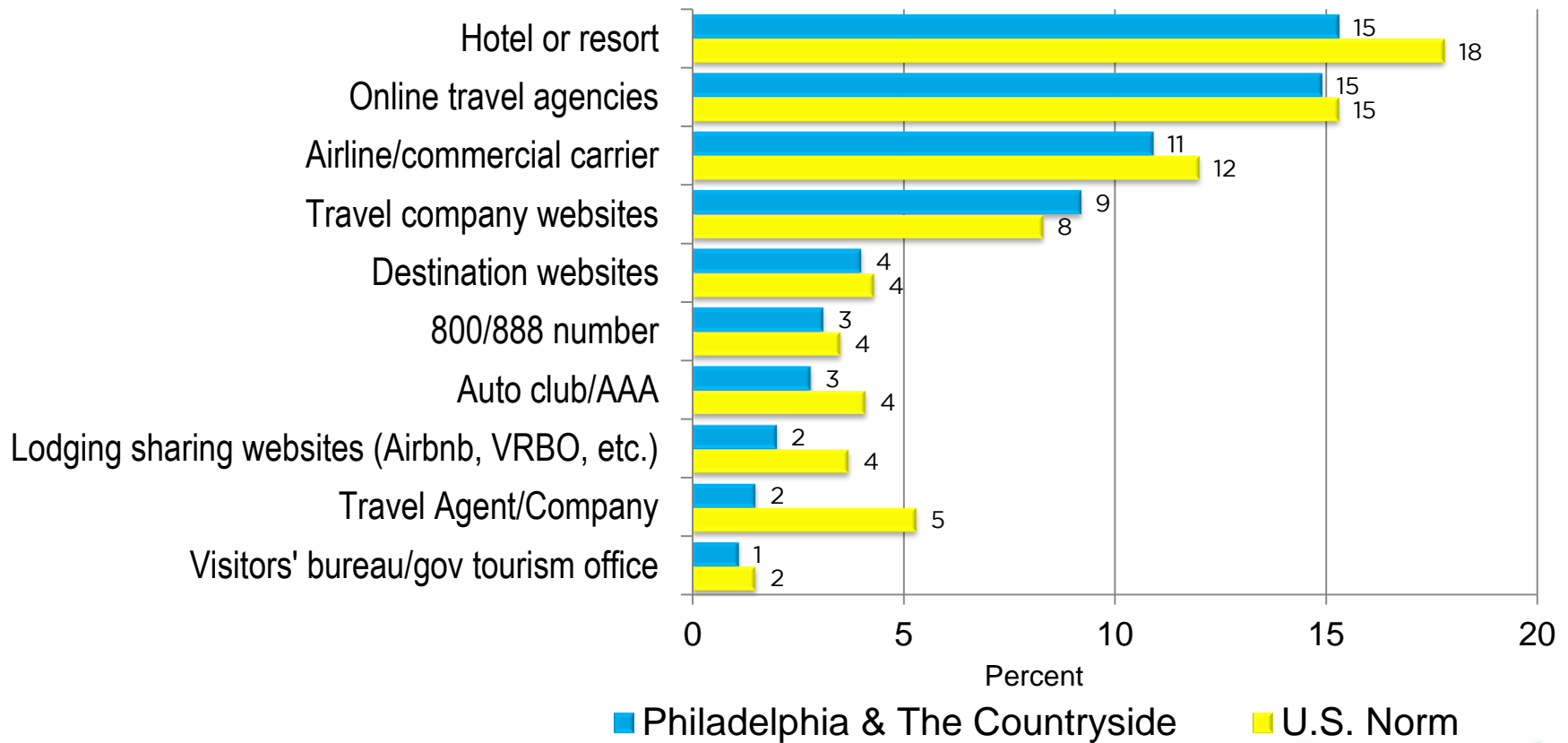


# Trip Planning Information Sources (Cont'd)

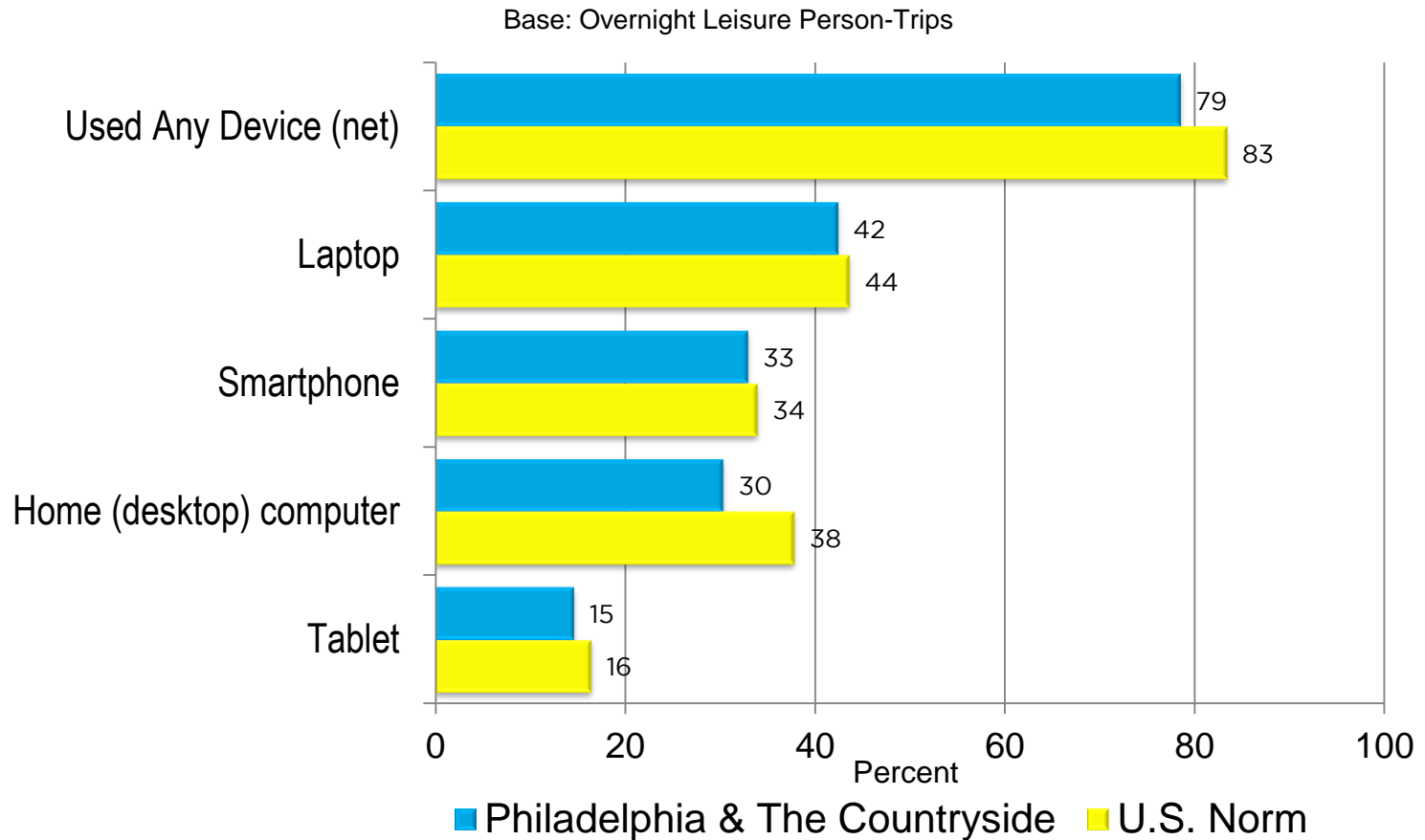


# Method of Booking

Base: Overnight Leisure Person-Trips

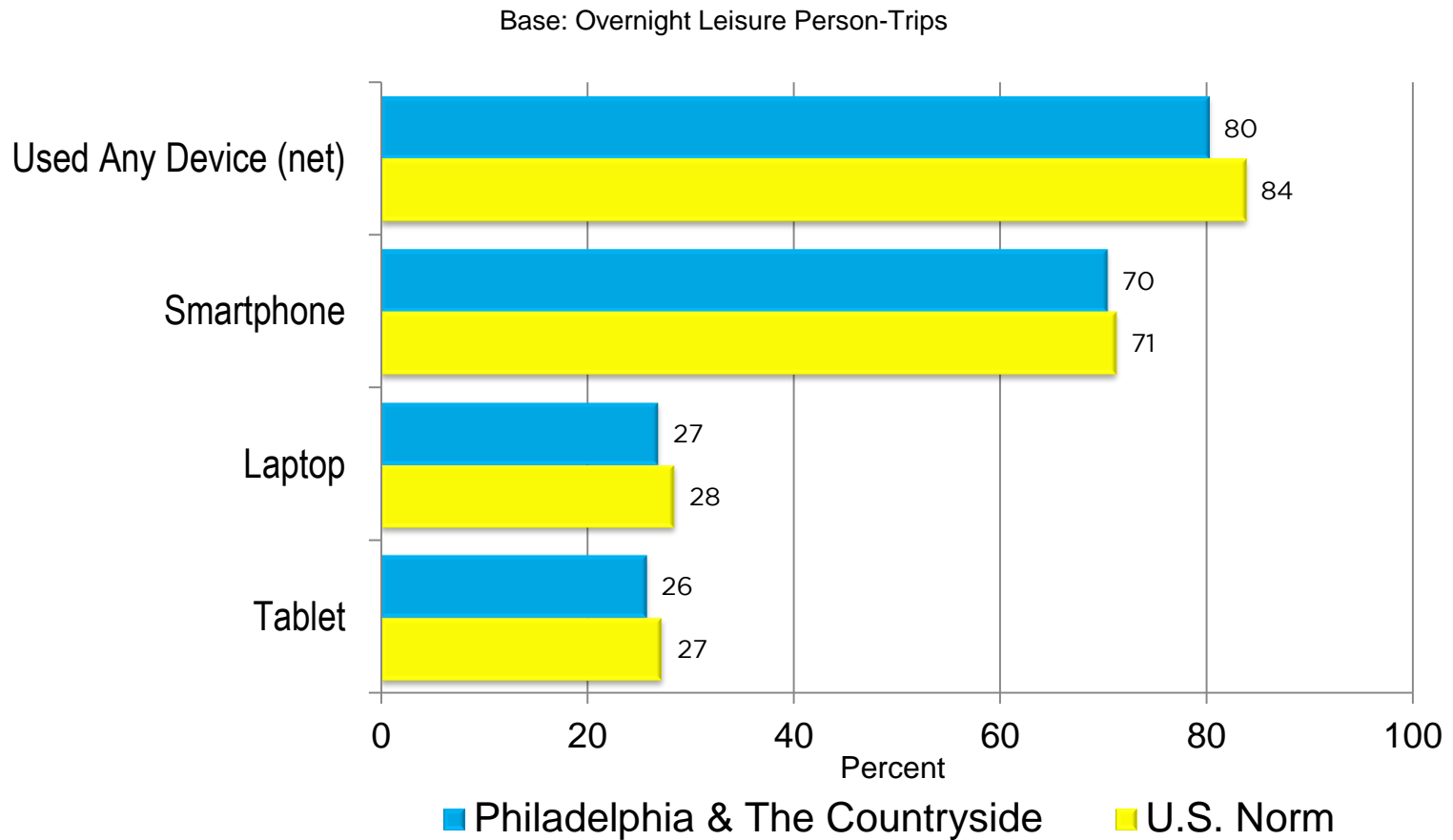


# Devices Used for Trip Planning



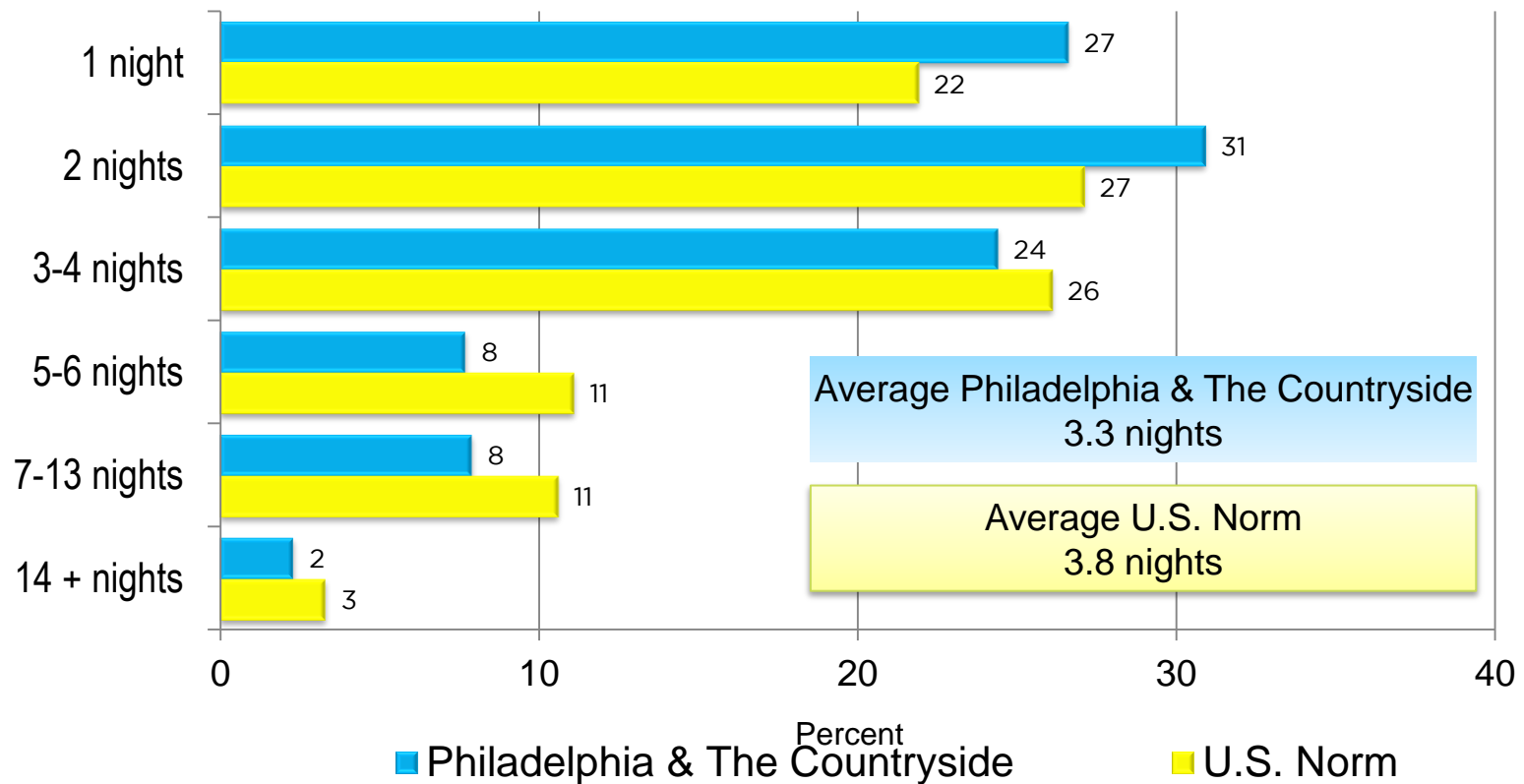


# Devices Used During Trip



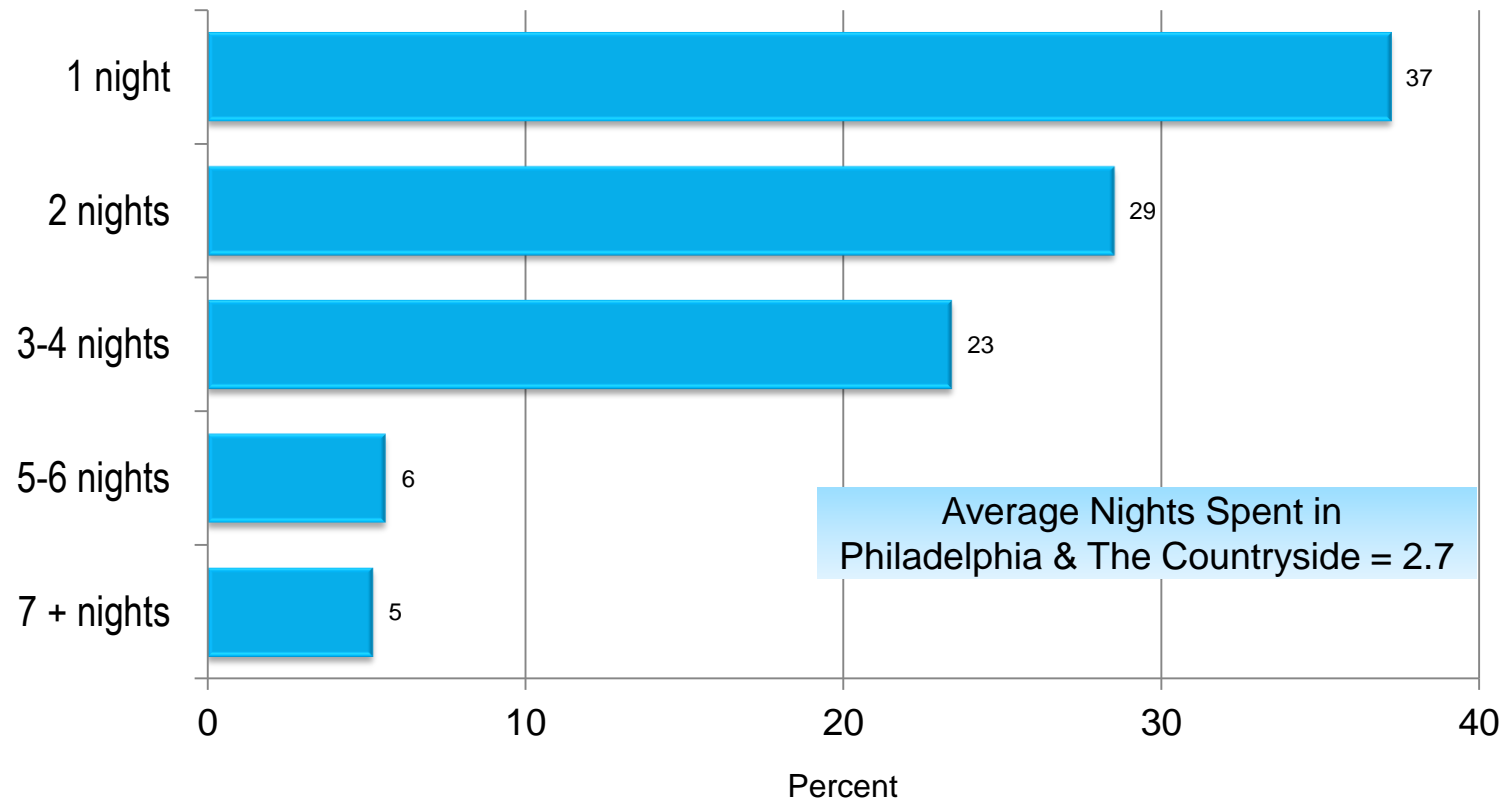
# Total Nights Away on Trip

Base: Overnight Leisure Person-Trips



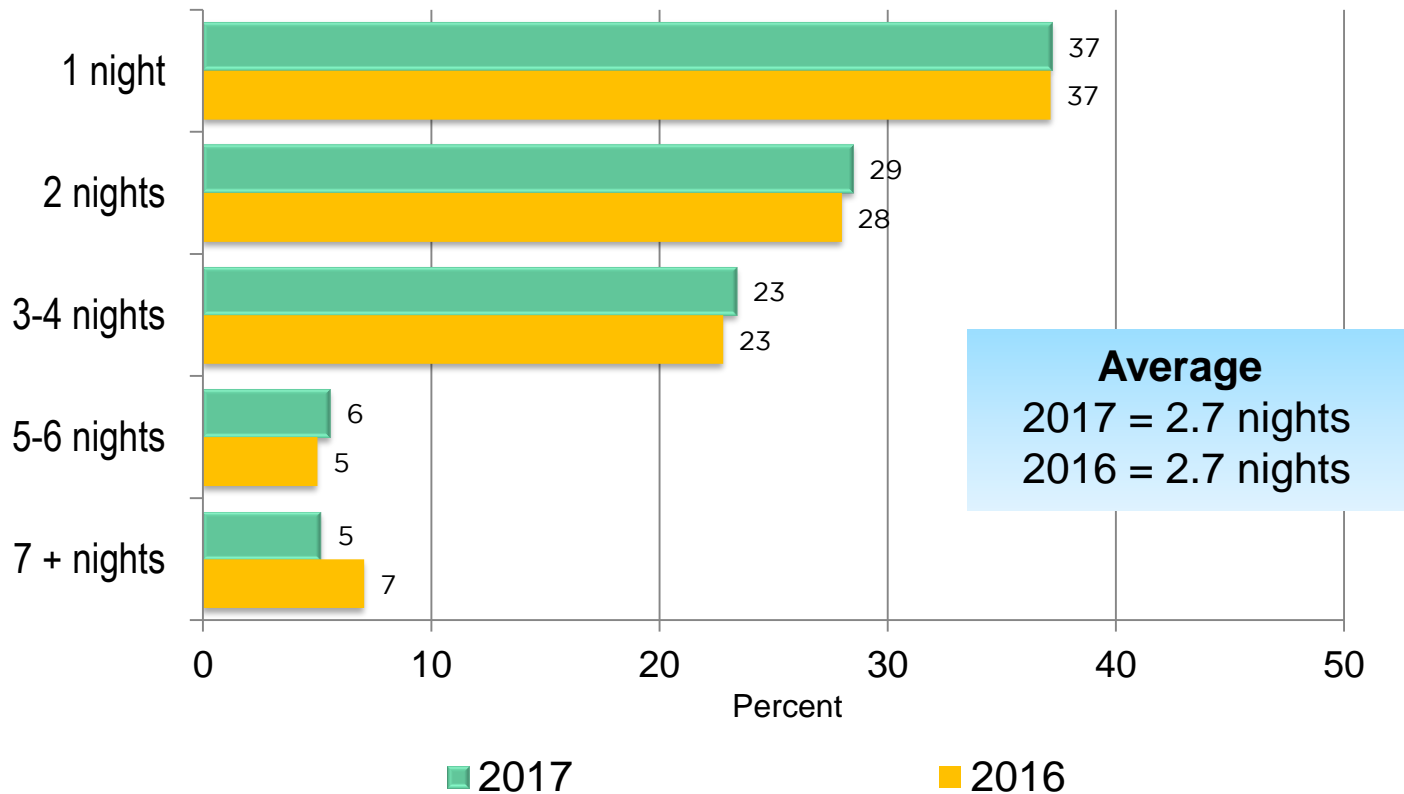
# Number of Nights Spent in Philadelphia & The Countryside

Base: Overnight Leisure Person-Trips with 1+ Nights Spent In Philadelphia & The Countryside

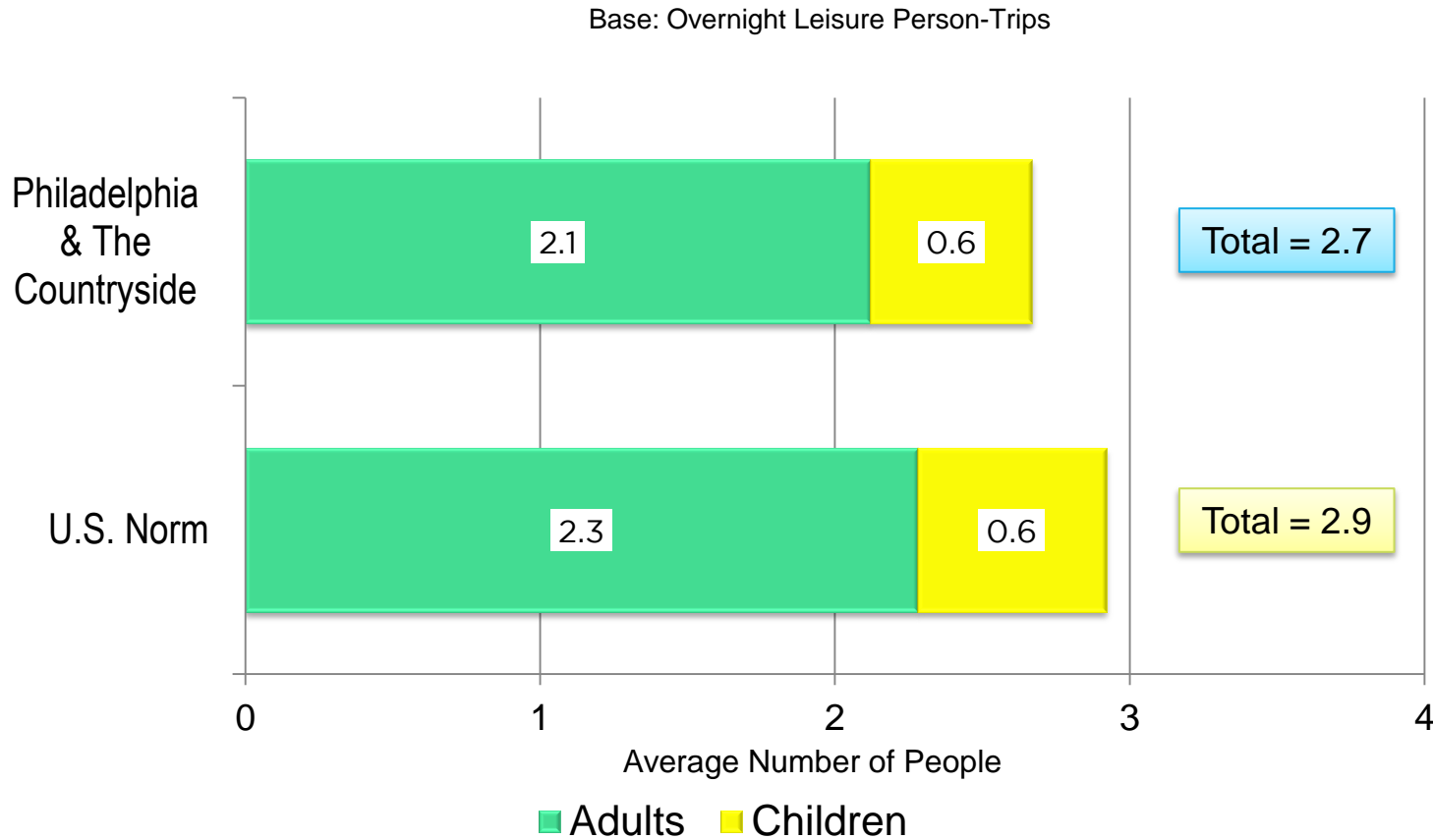


# Number of Nights Spent in Philadelphia & The Countryside - 2017 vs. 2016

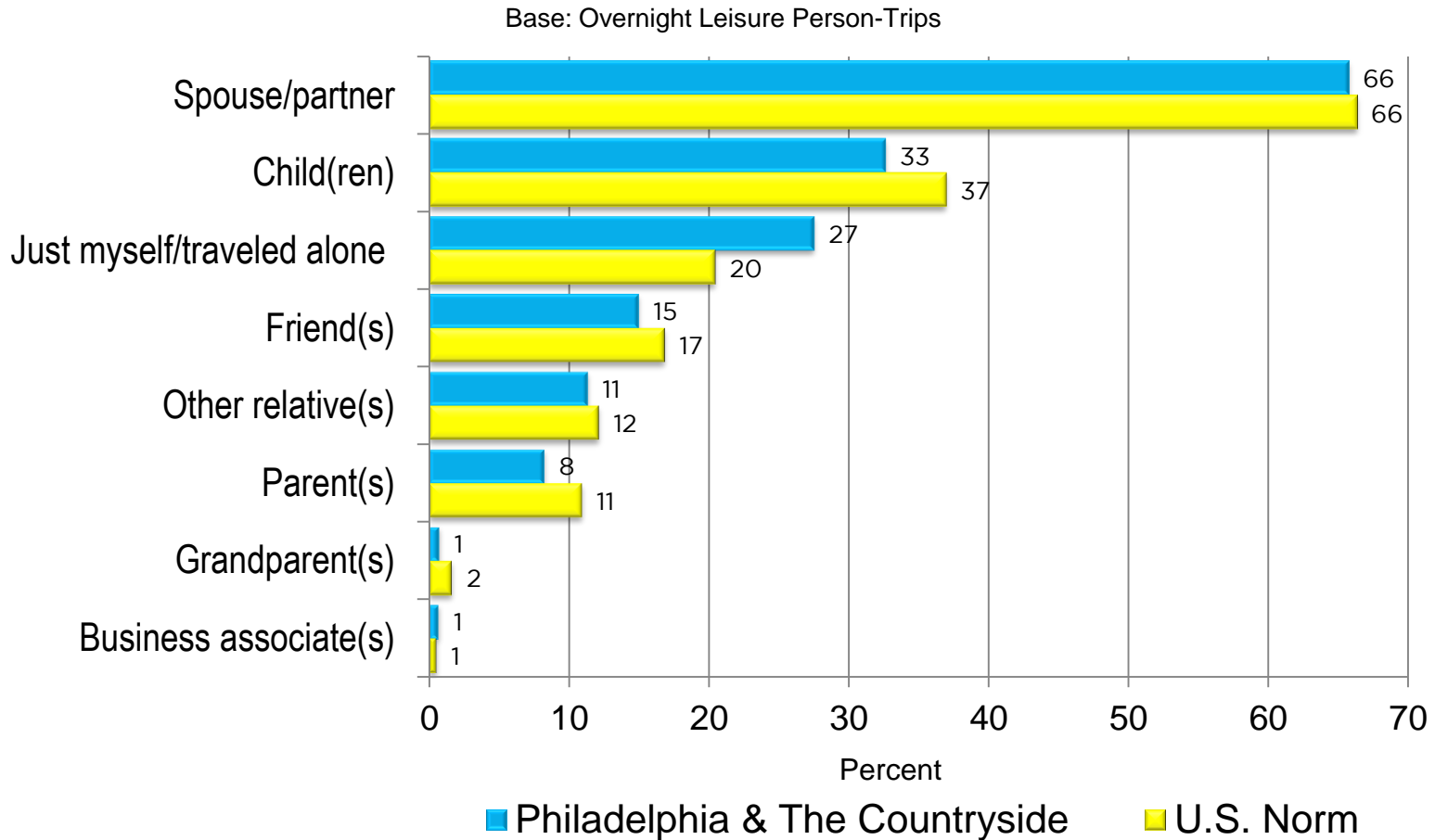
Base: Overnight Leisure Person-Trips with 1+ Nights Spent In Philadelphia & The Countryside



# Size of Travel Party

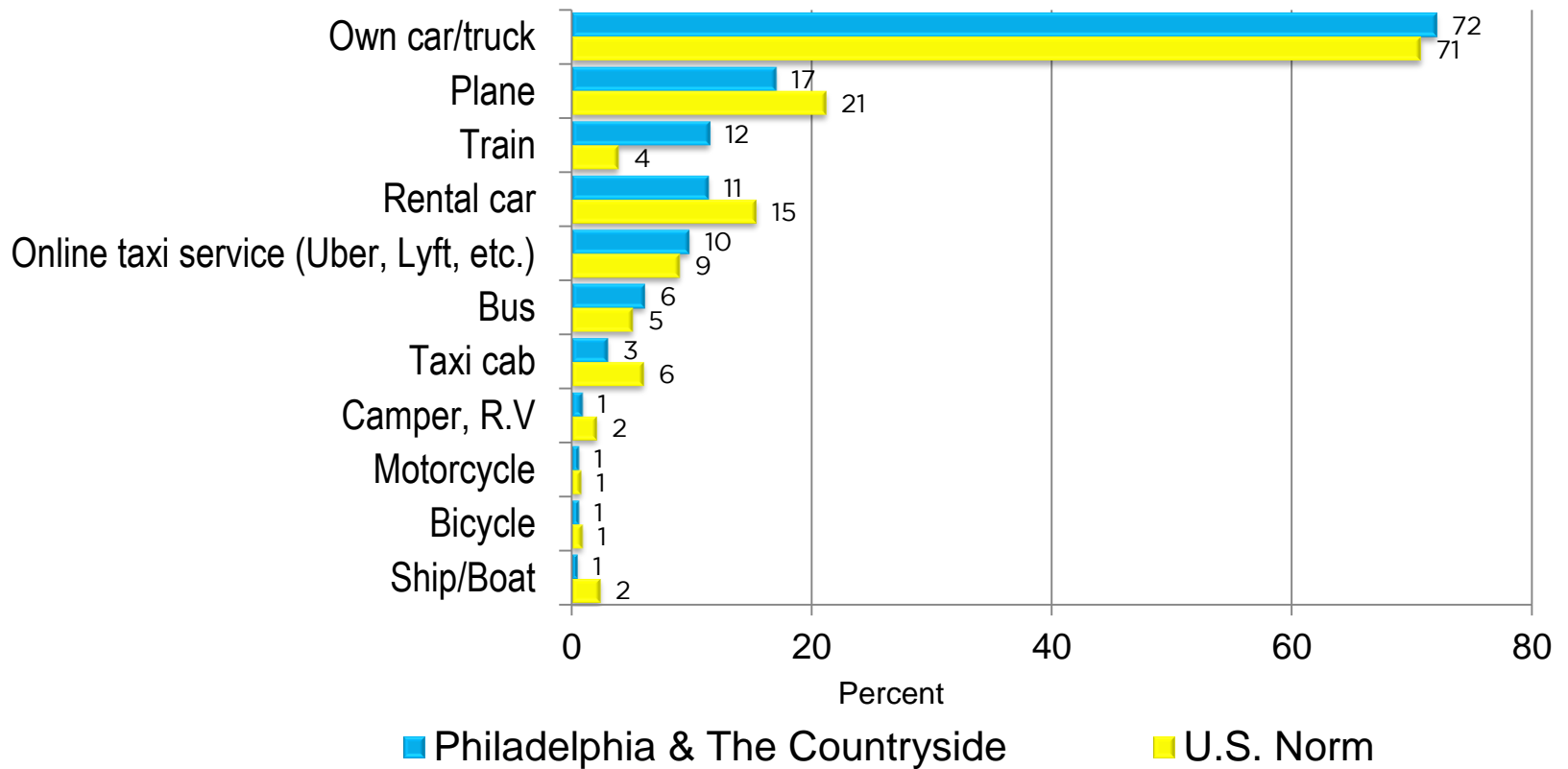


# Composition of Immediate Travel Party



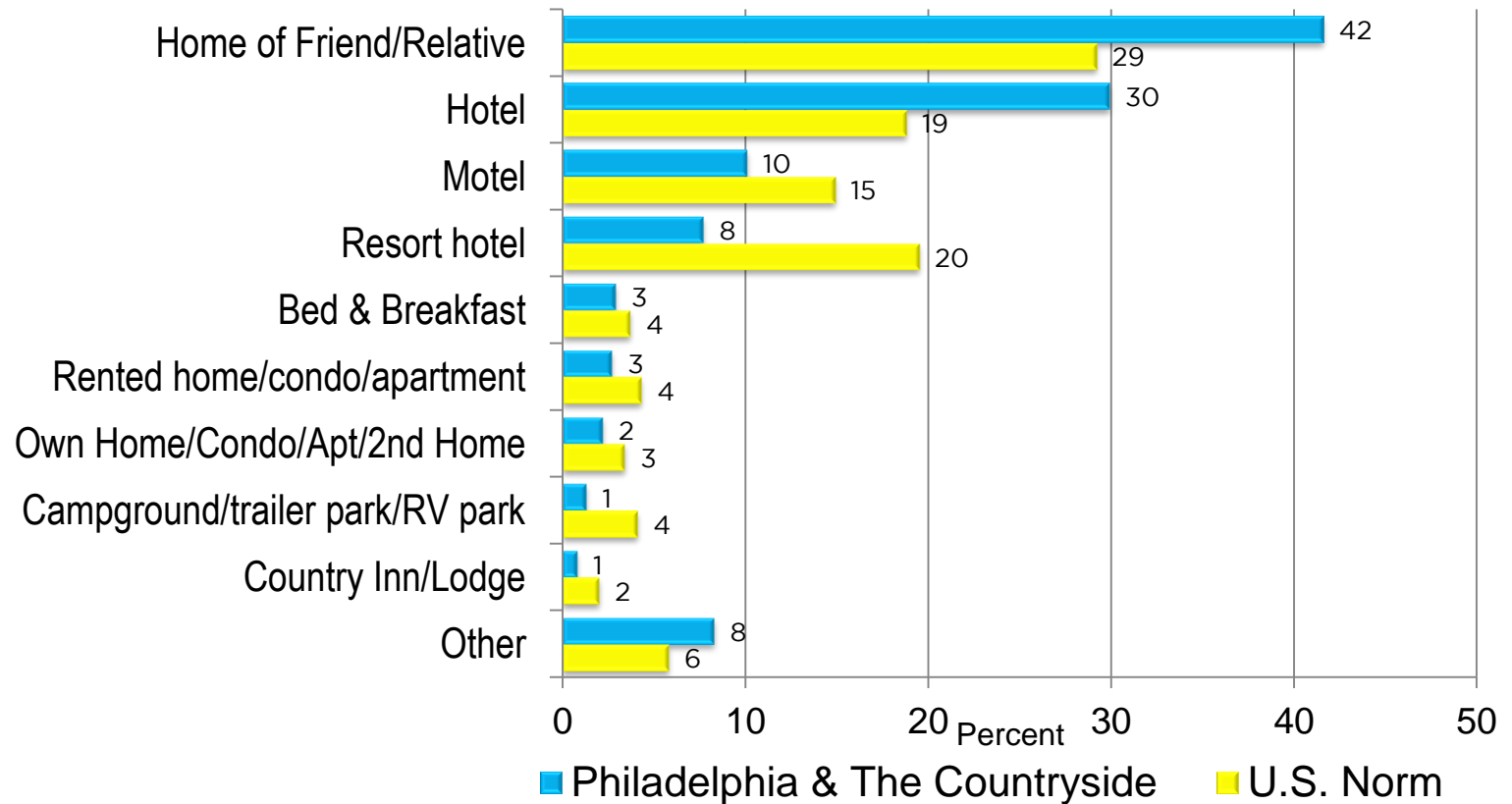
# Transportation

Base: Overnight Leisure Person-Trips



# Accommodations

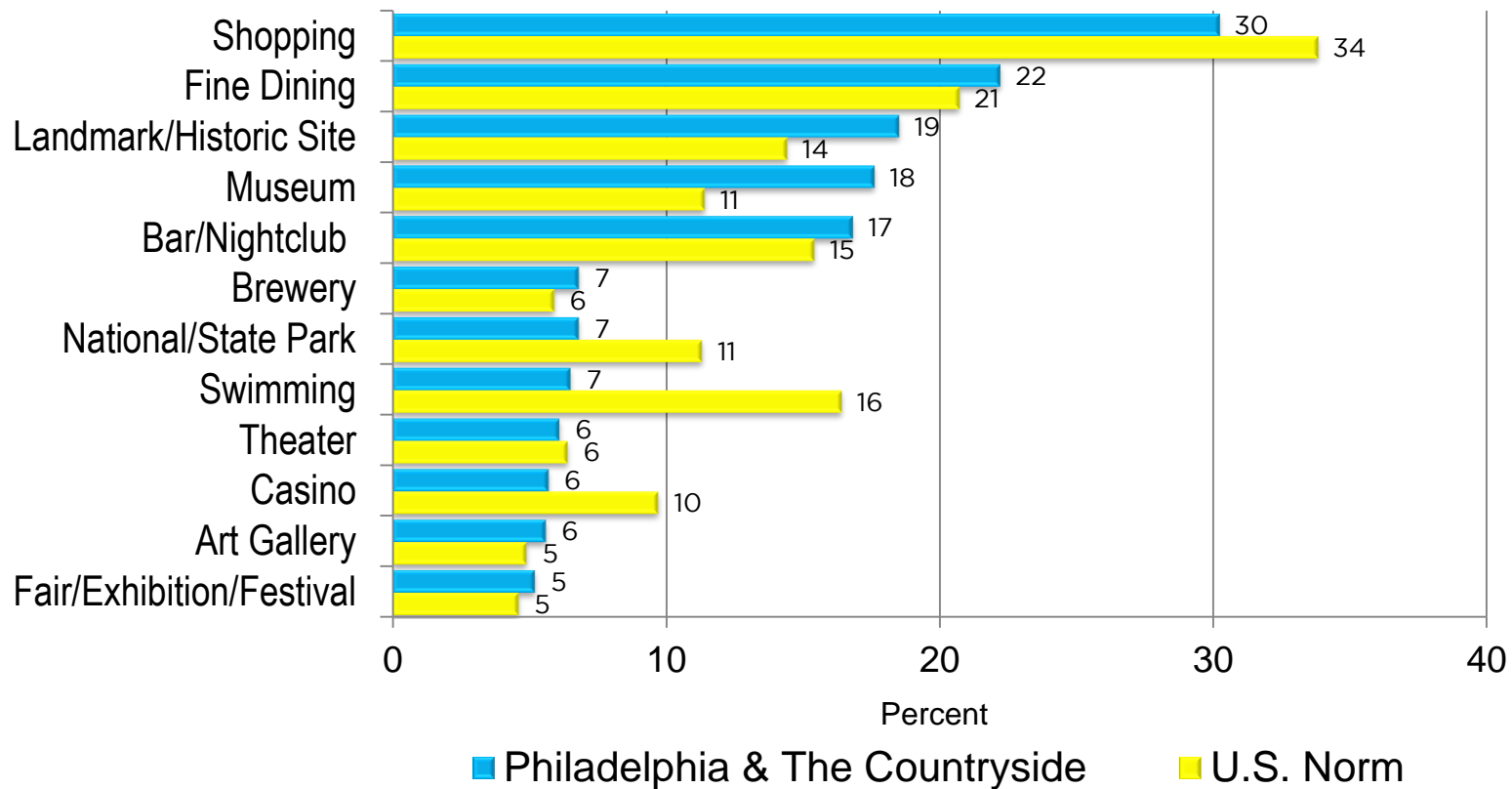
Base: Overnight Leisure Person-Trips





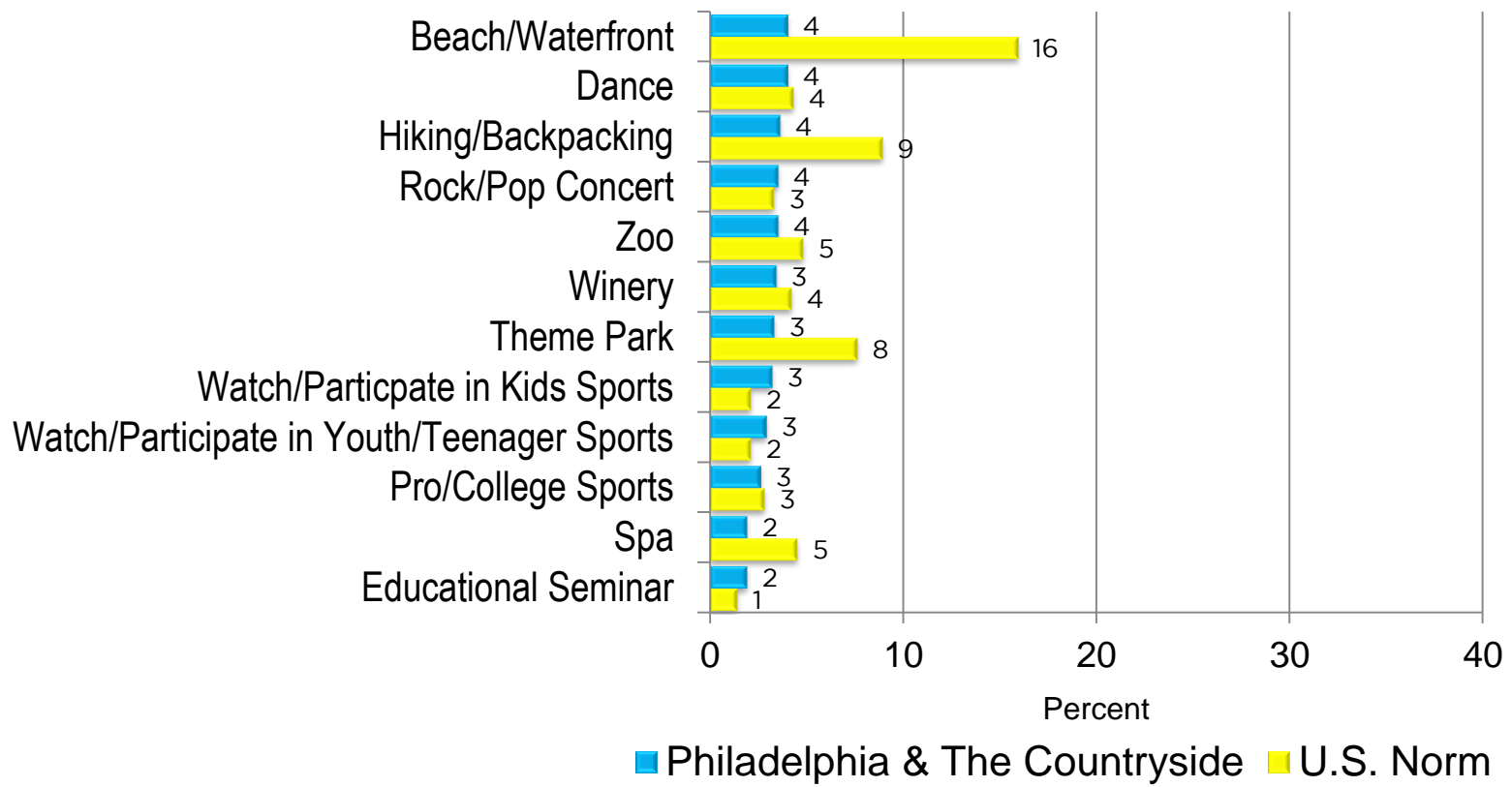
# Activities and Experiences

Base: Overnight Leisure Person-Trips



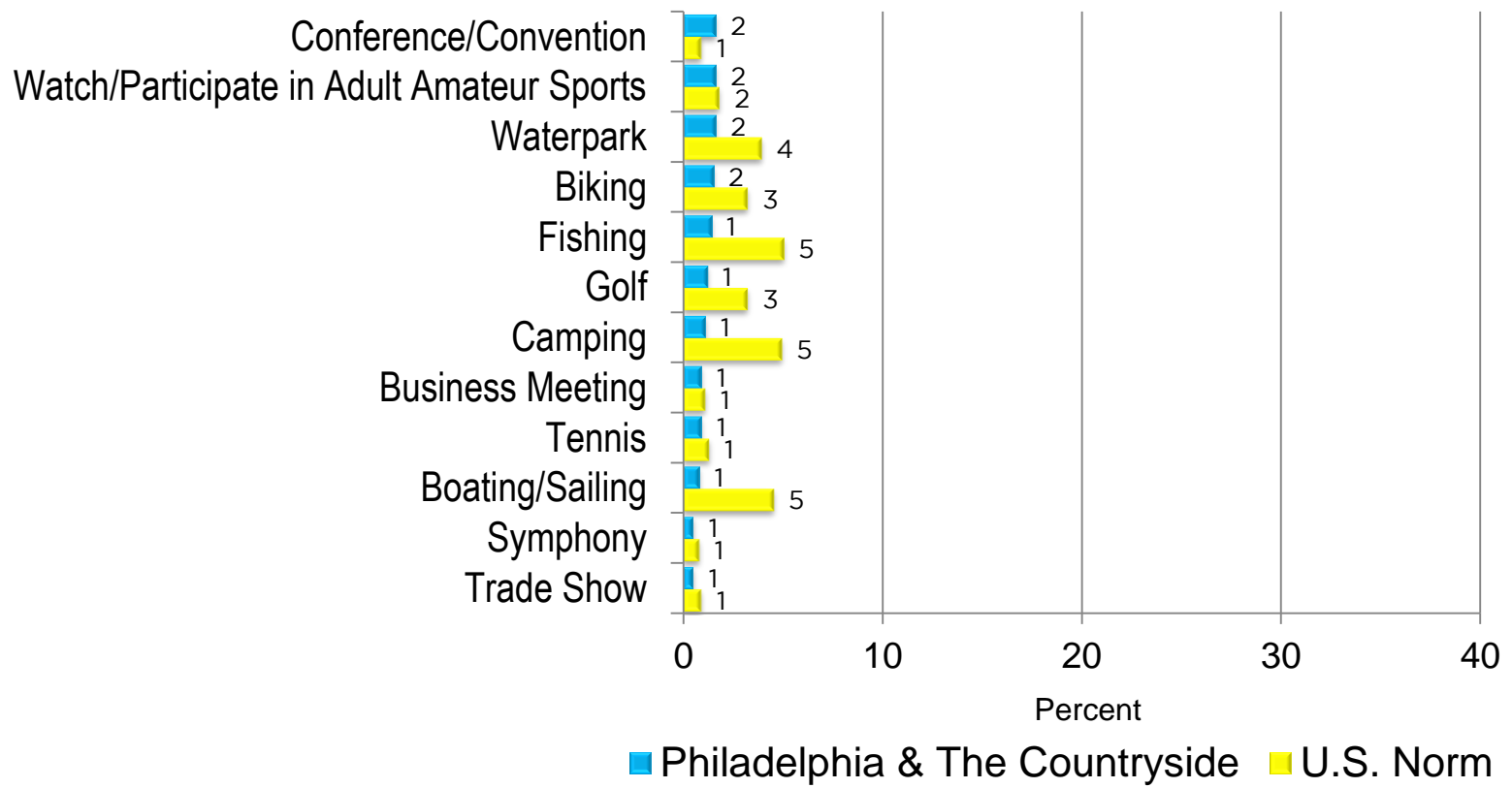
# Activities and Experiences (Cont'd)

Base: Overnight Leisure Person-Trips



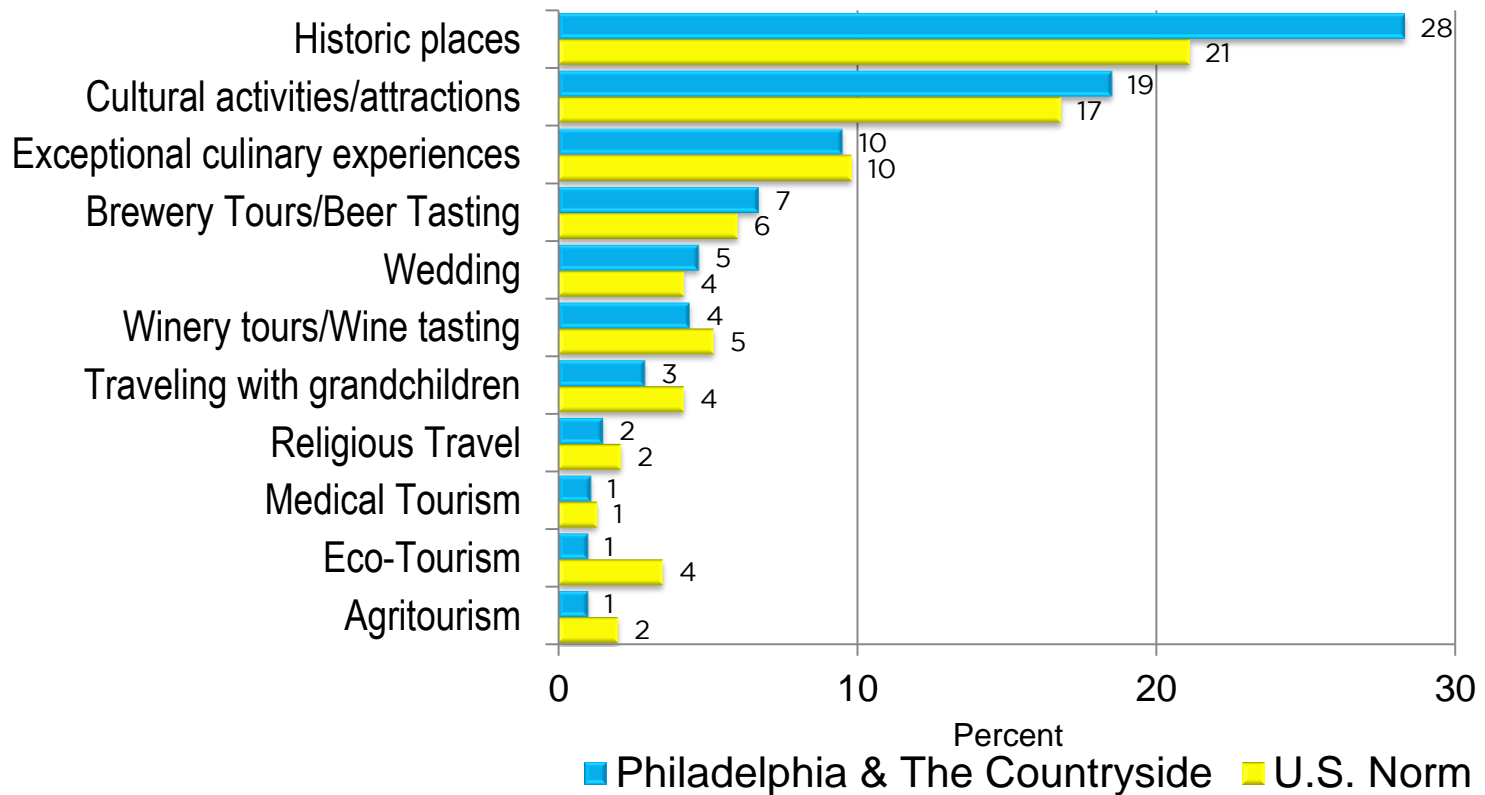
# Activities and Experiences (Cont'd)

Base: Overnight Leisure Person-Trips



# Activities of Special Interest

Base: Overnight Leisure Person-Trips



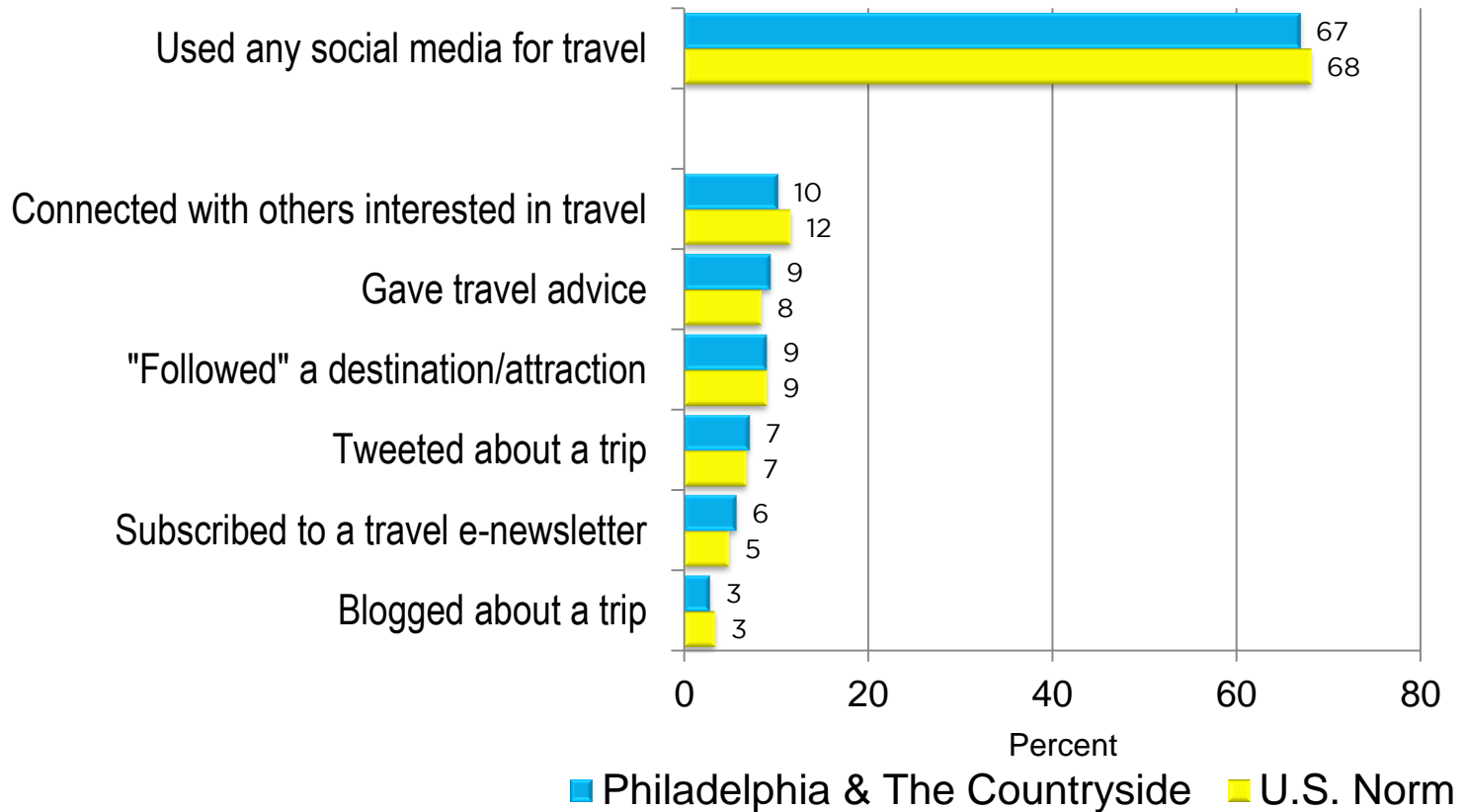
# Online Social Media Use by Travelers

Base: Overnight Leisure Person-Trips



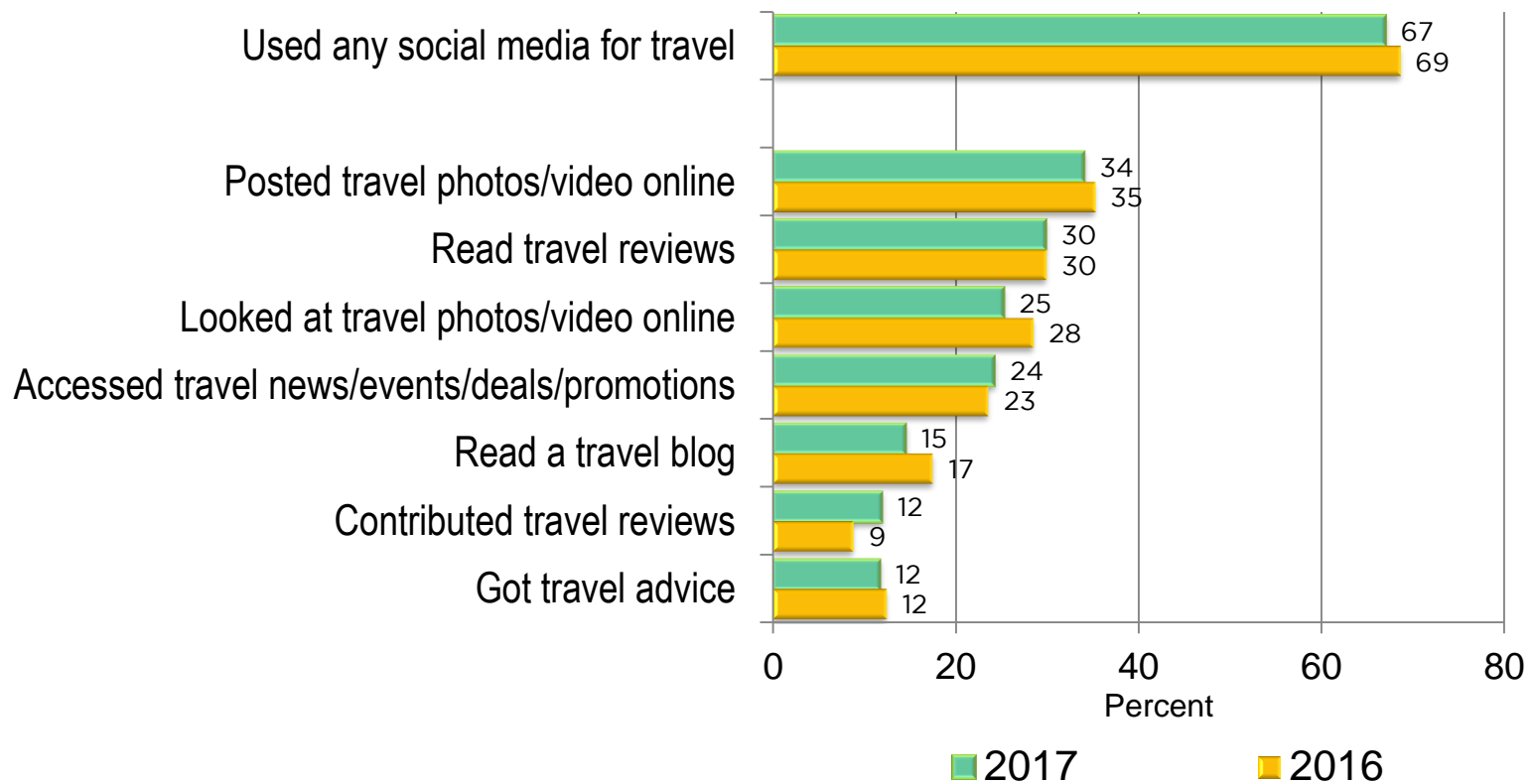
# Online Social Media Use by Travelers (Cont'd)

Base: Overnight Leisure Person-Trips



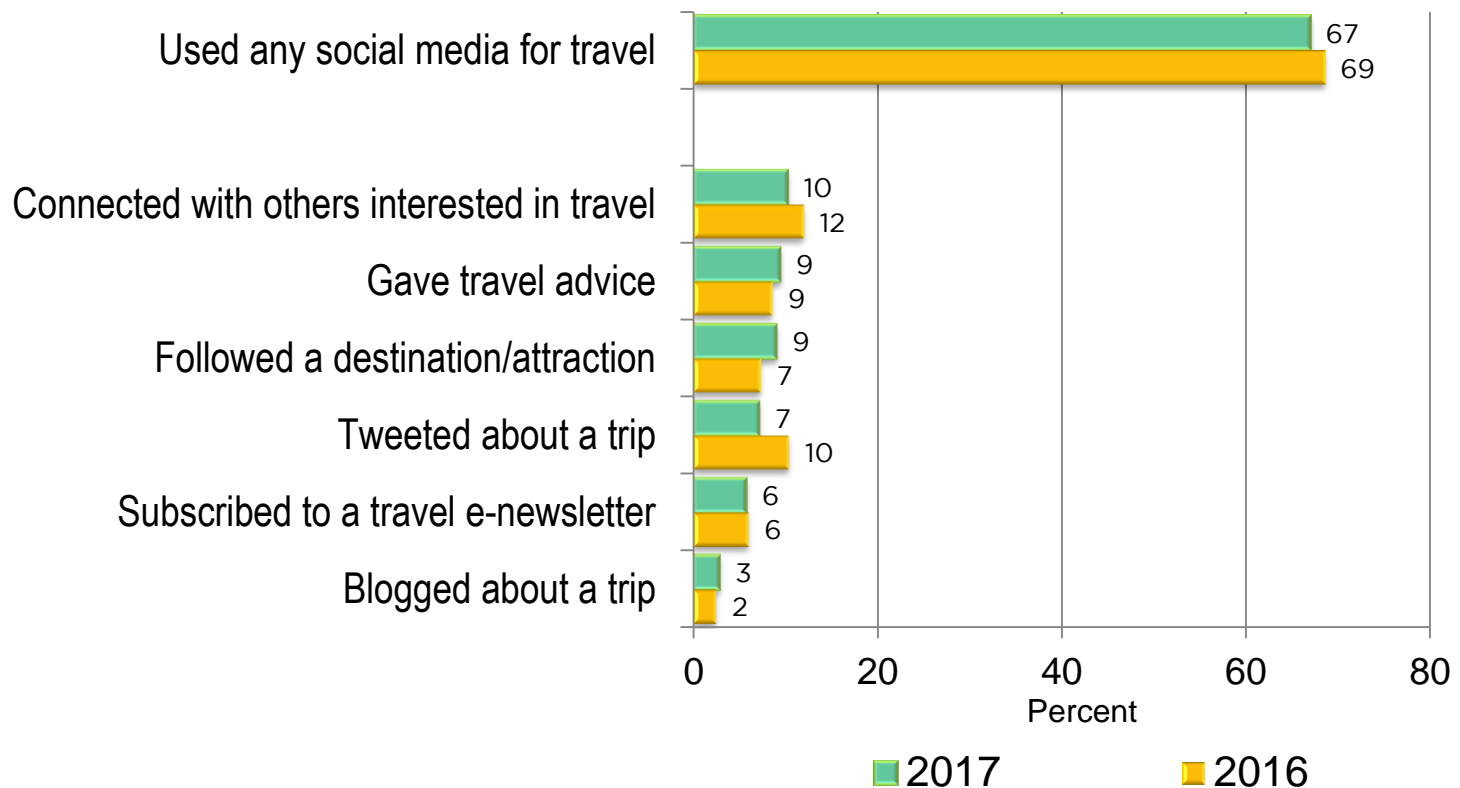
# Online Social Media Use by Travelers – 2017 vs. 2016

Base: Overnight Leisure Person-Trips



# Online Social Media Use by Travelers – 2017 vs. 2016 (Cont'd)

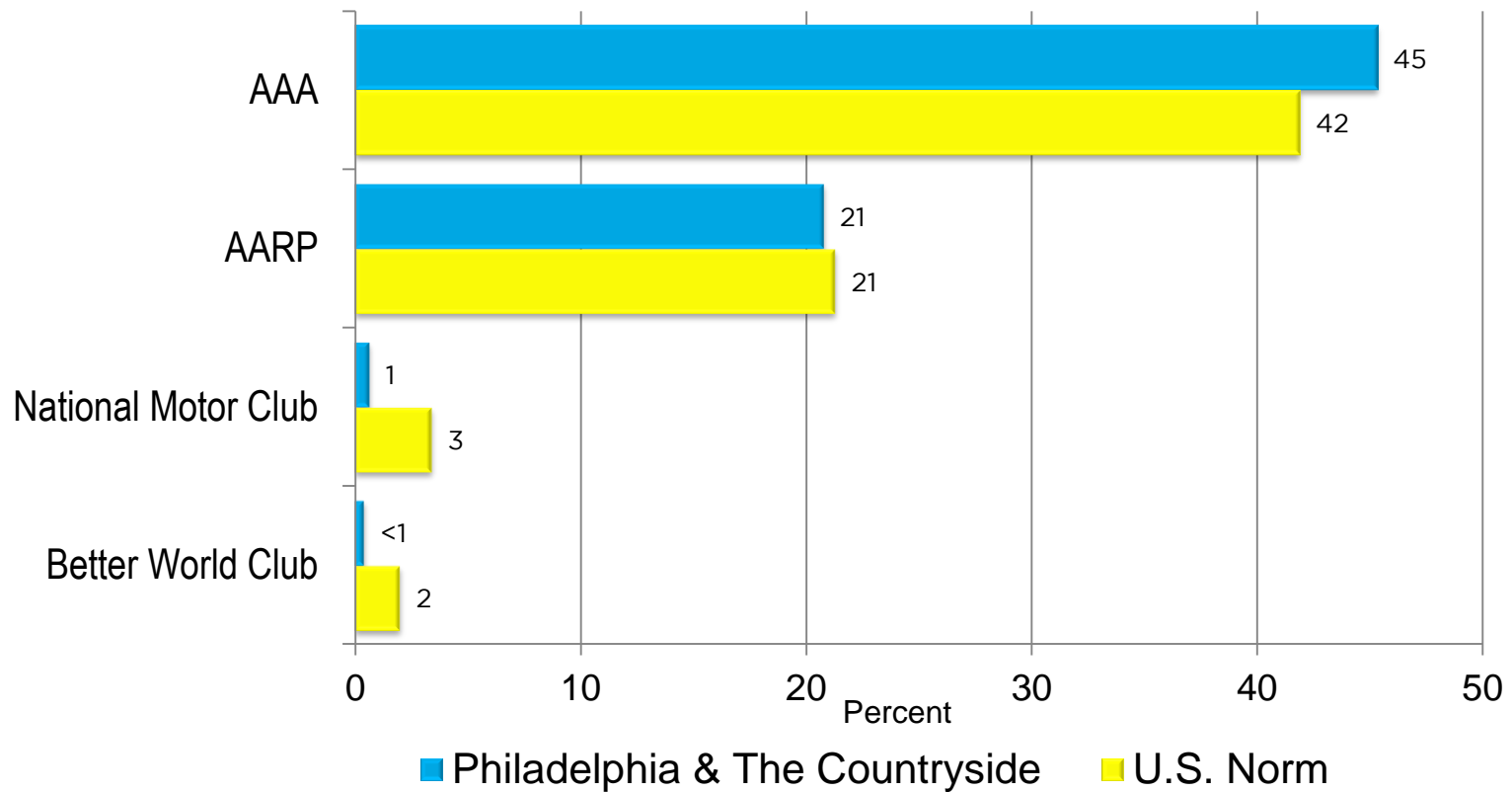
Base: Overnight Leisure Person-Trips





# Organization Membership

Base: Overnight Leisure Person-Trips

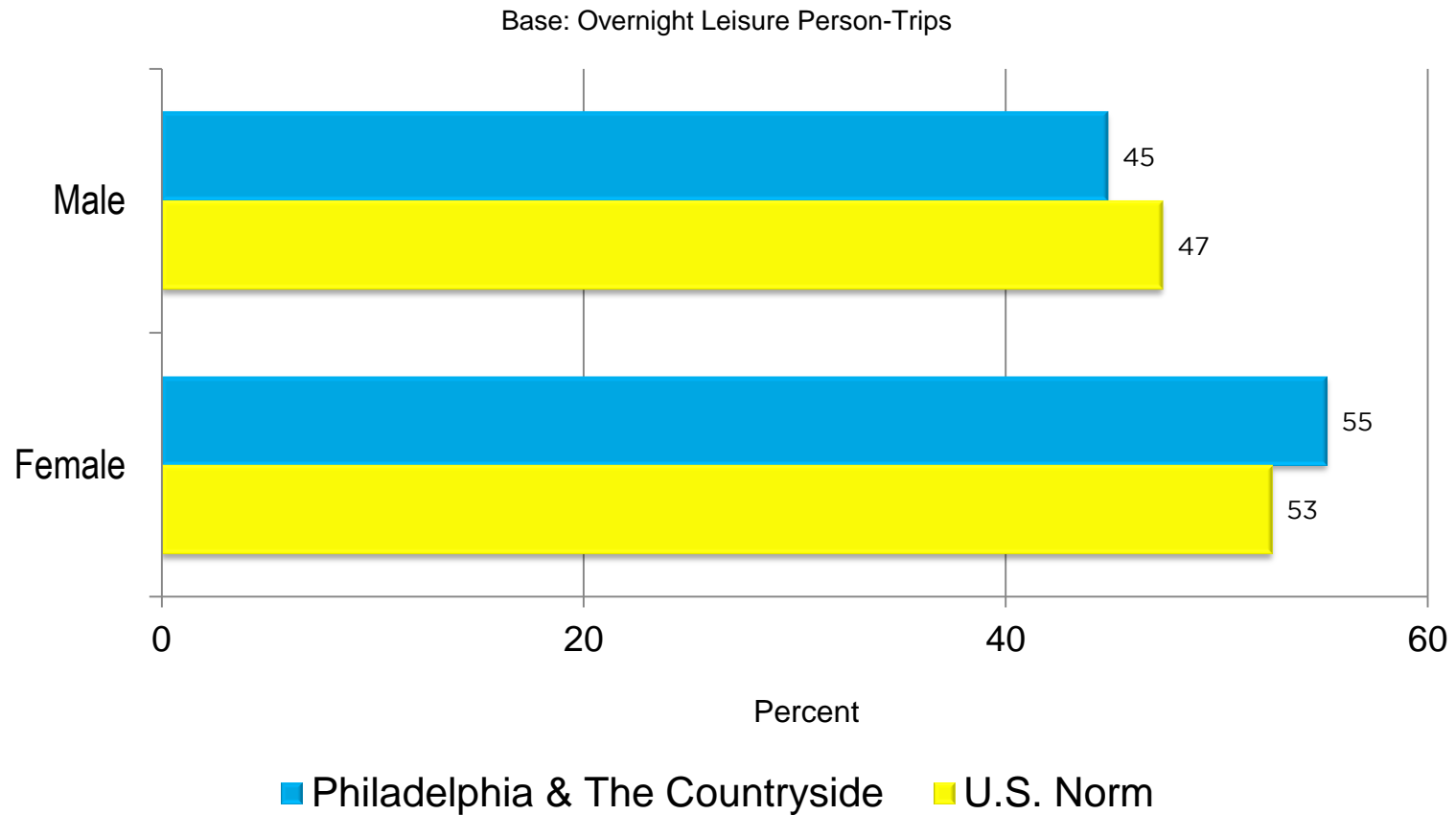




## Demographic Profile of Overnight Visitors

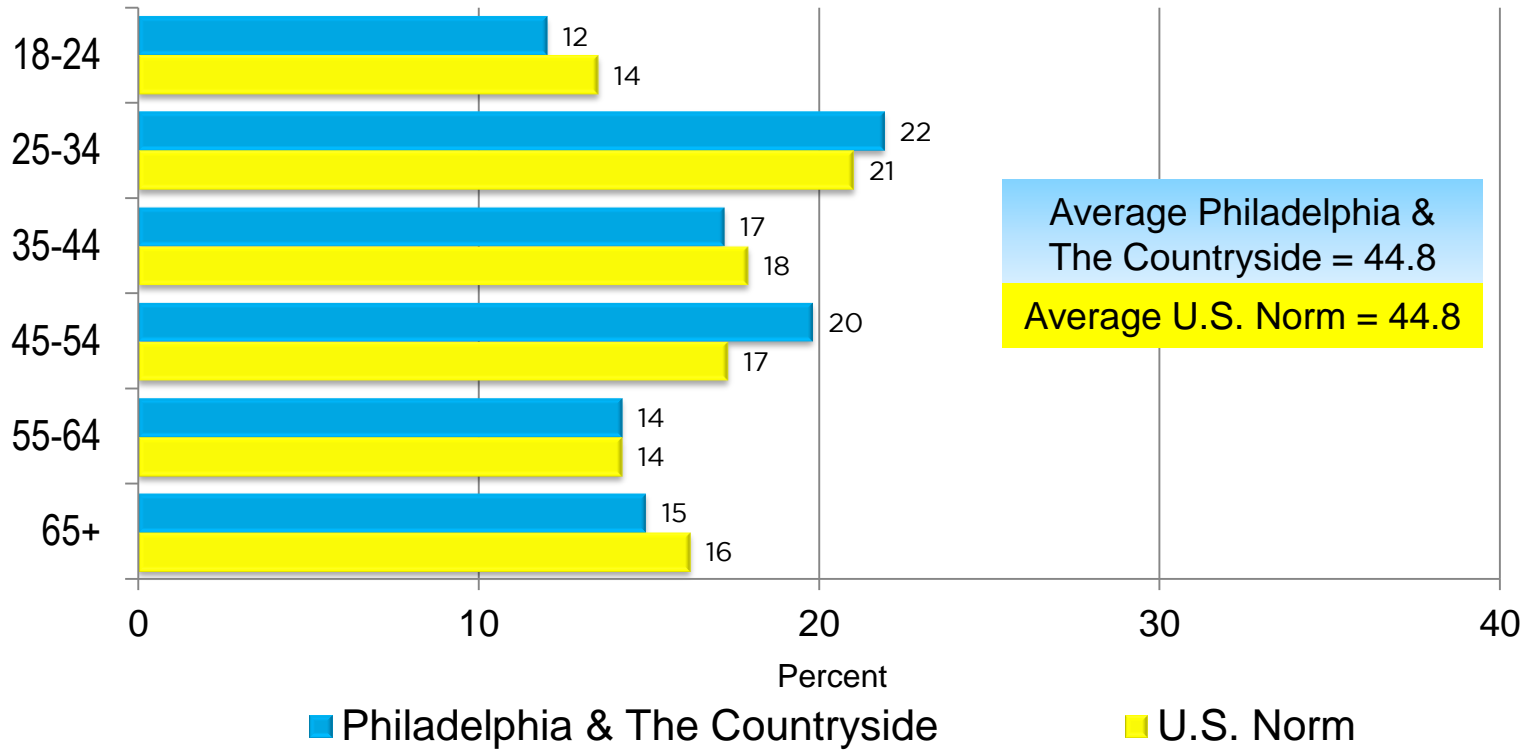


# Gender

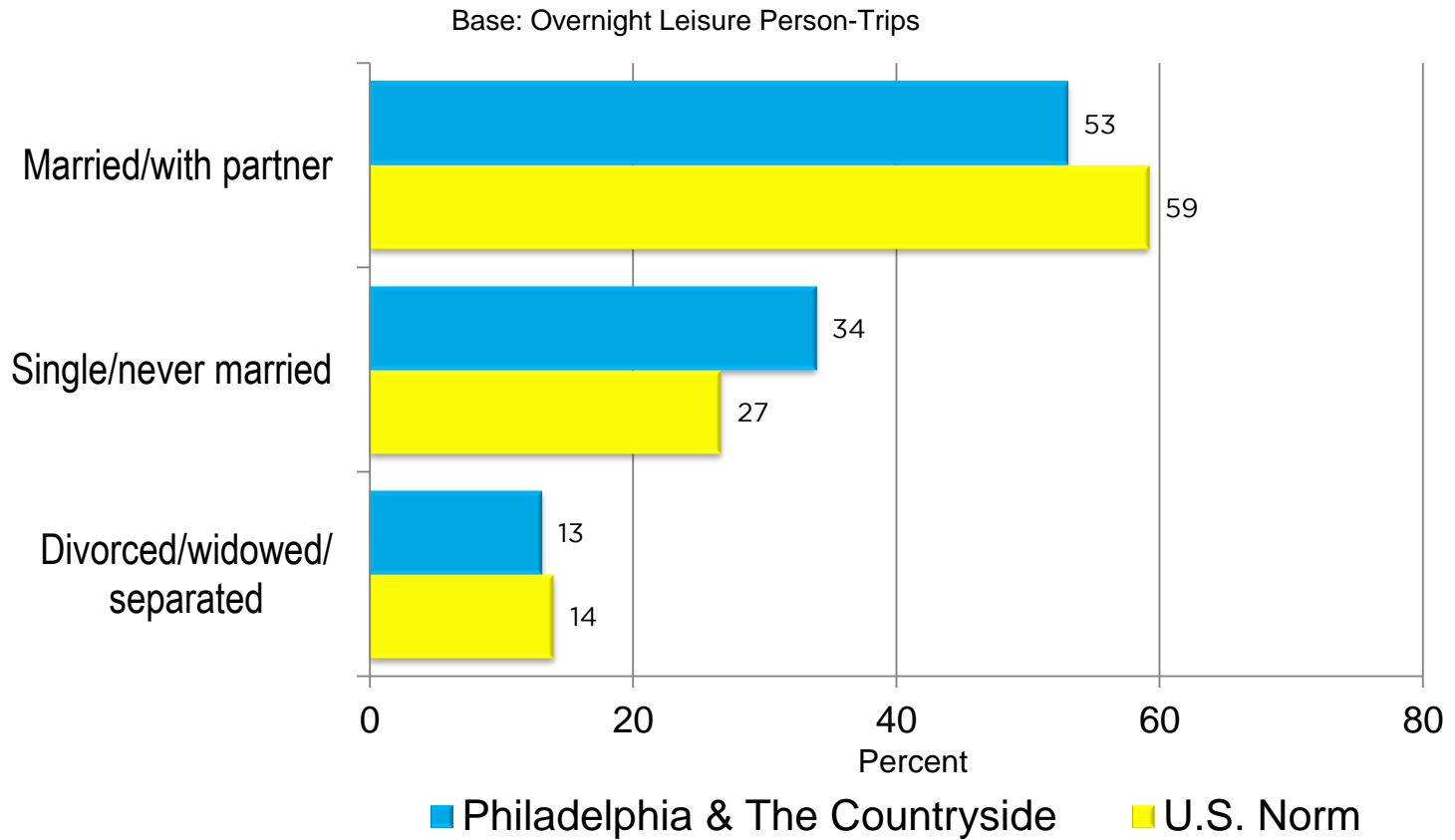


# Age

Base: Overnight Leisure Person-Trips

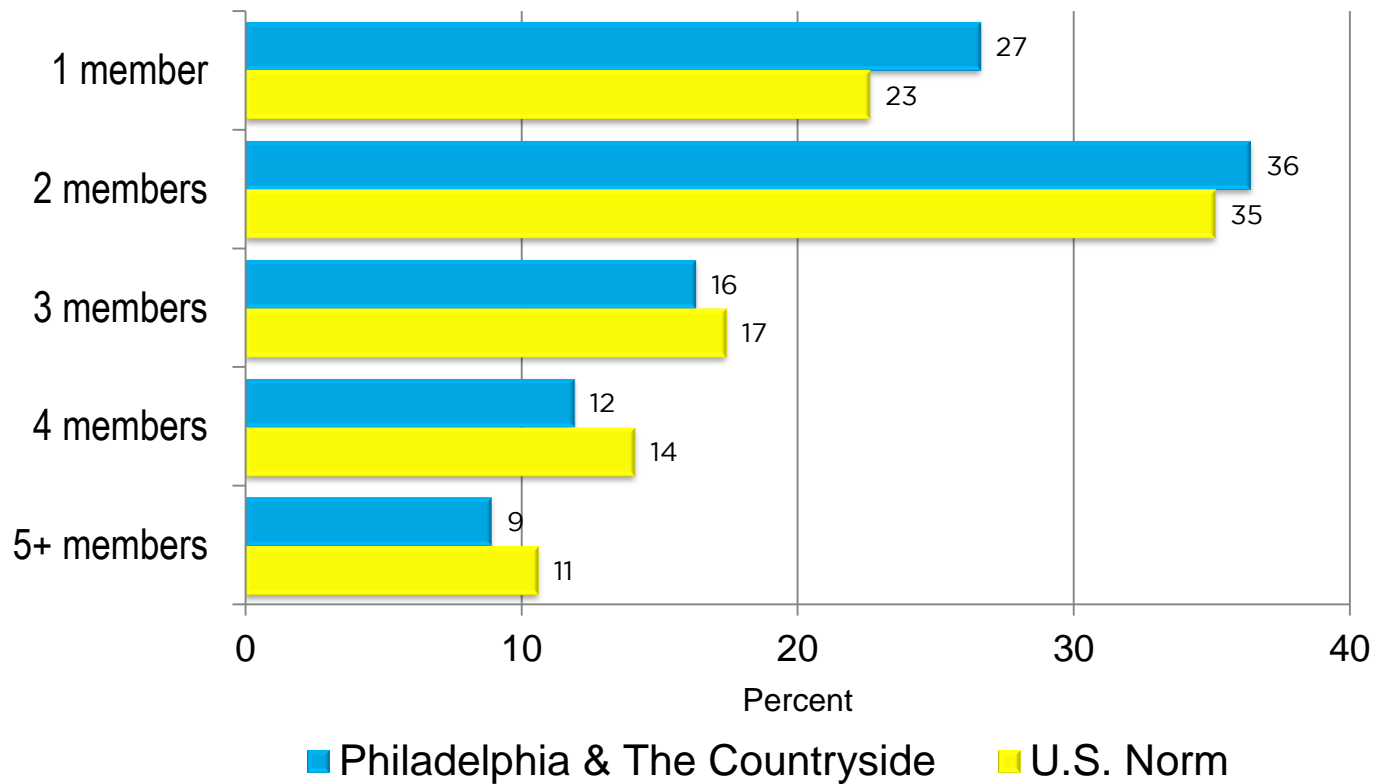


# Marital Status



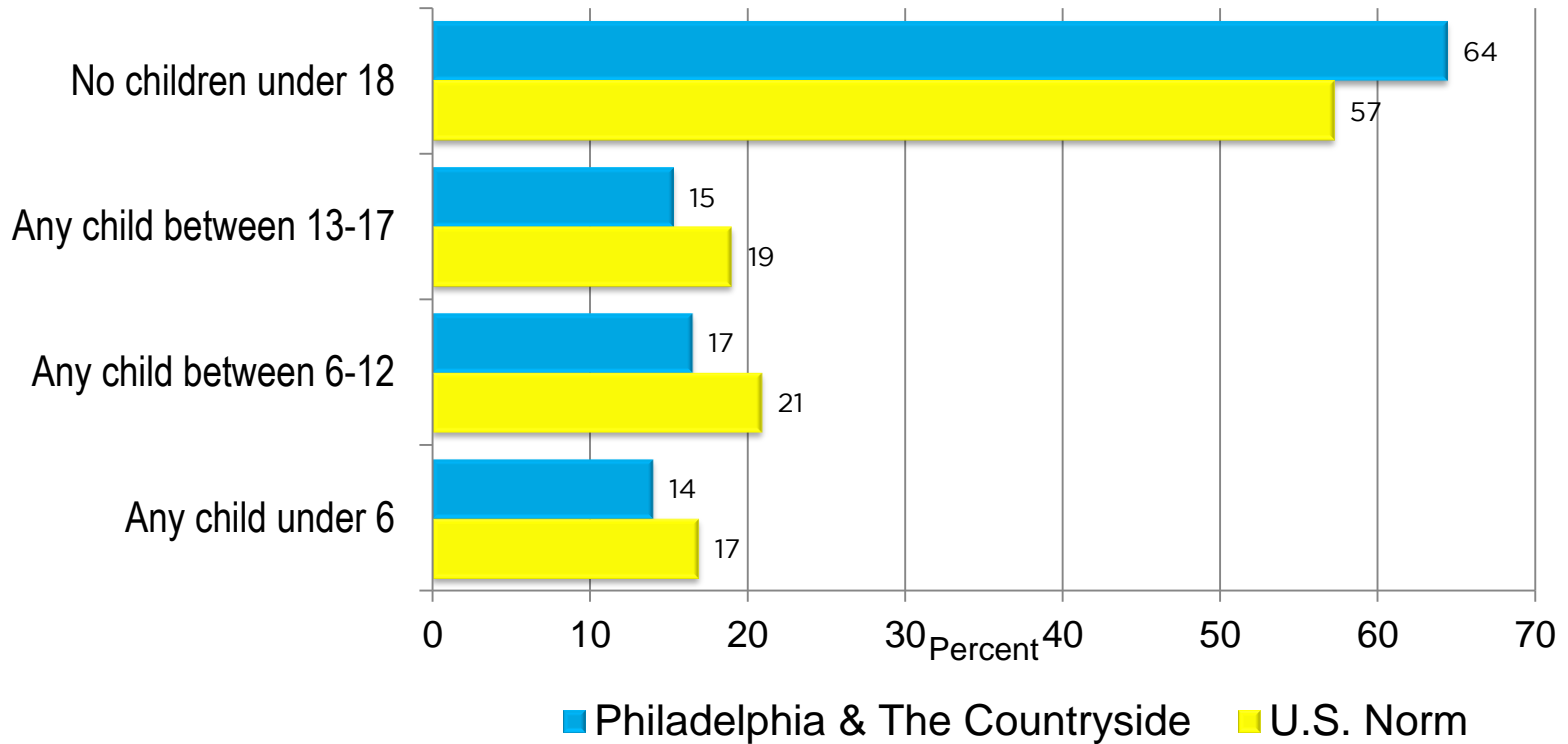
# Household Size

Base: Overnight Leisure Person-Trips



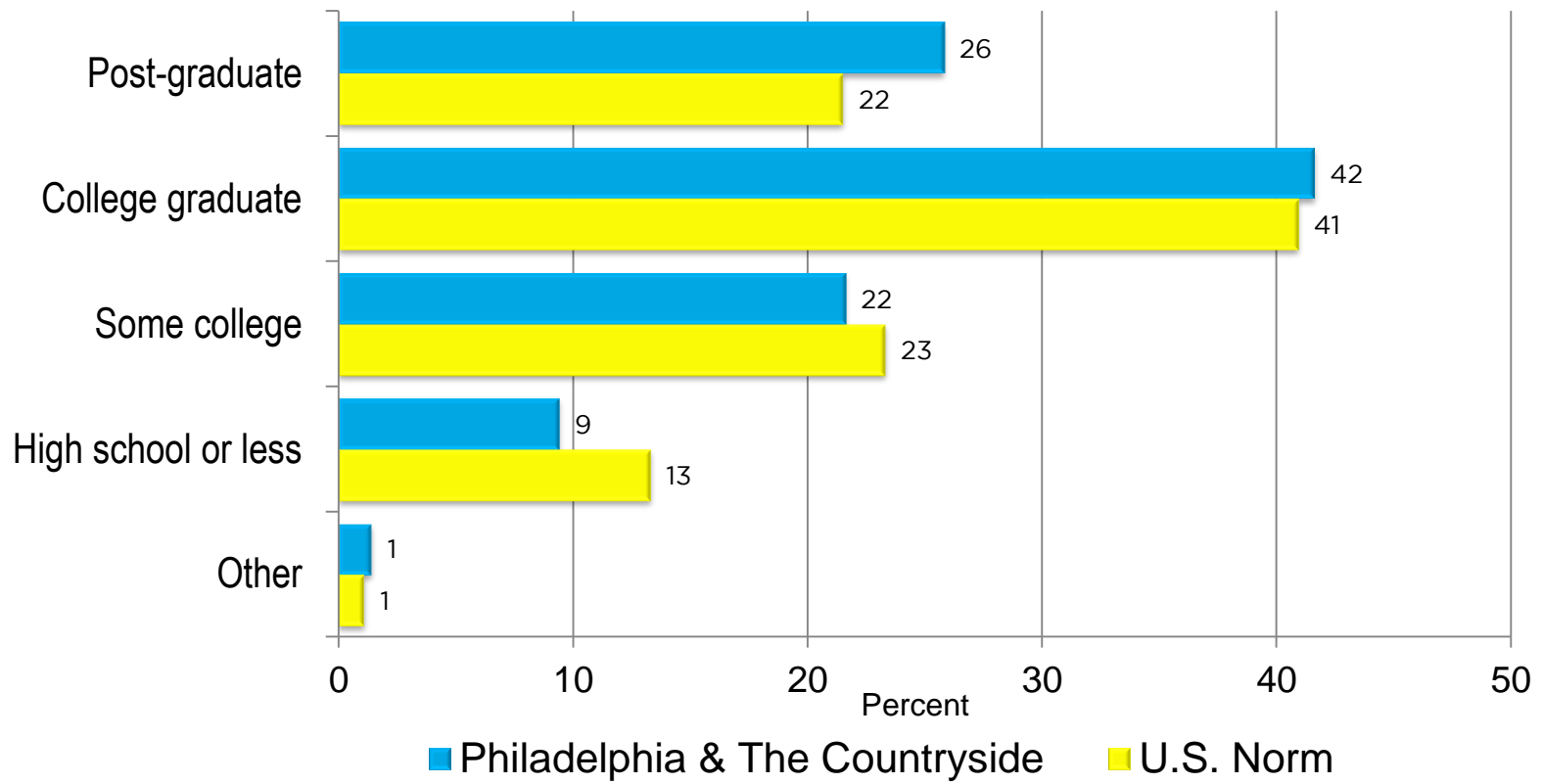
# Children in Household

Base: Overnight Leisure Person-Trips



# Education

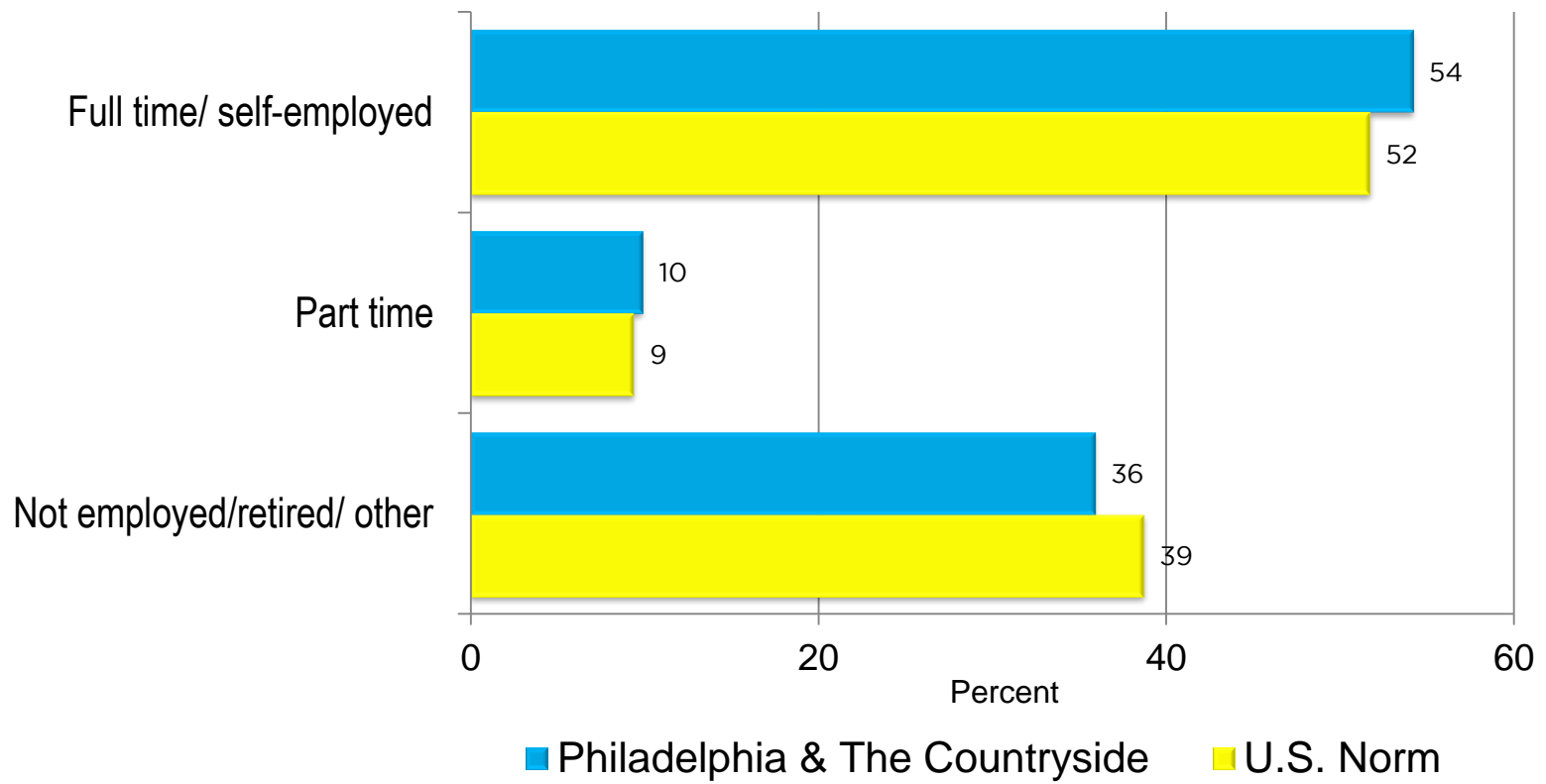
Base: Overnight Leisure Person-Trips





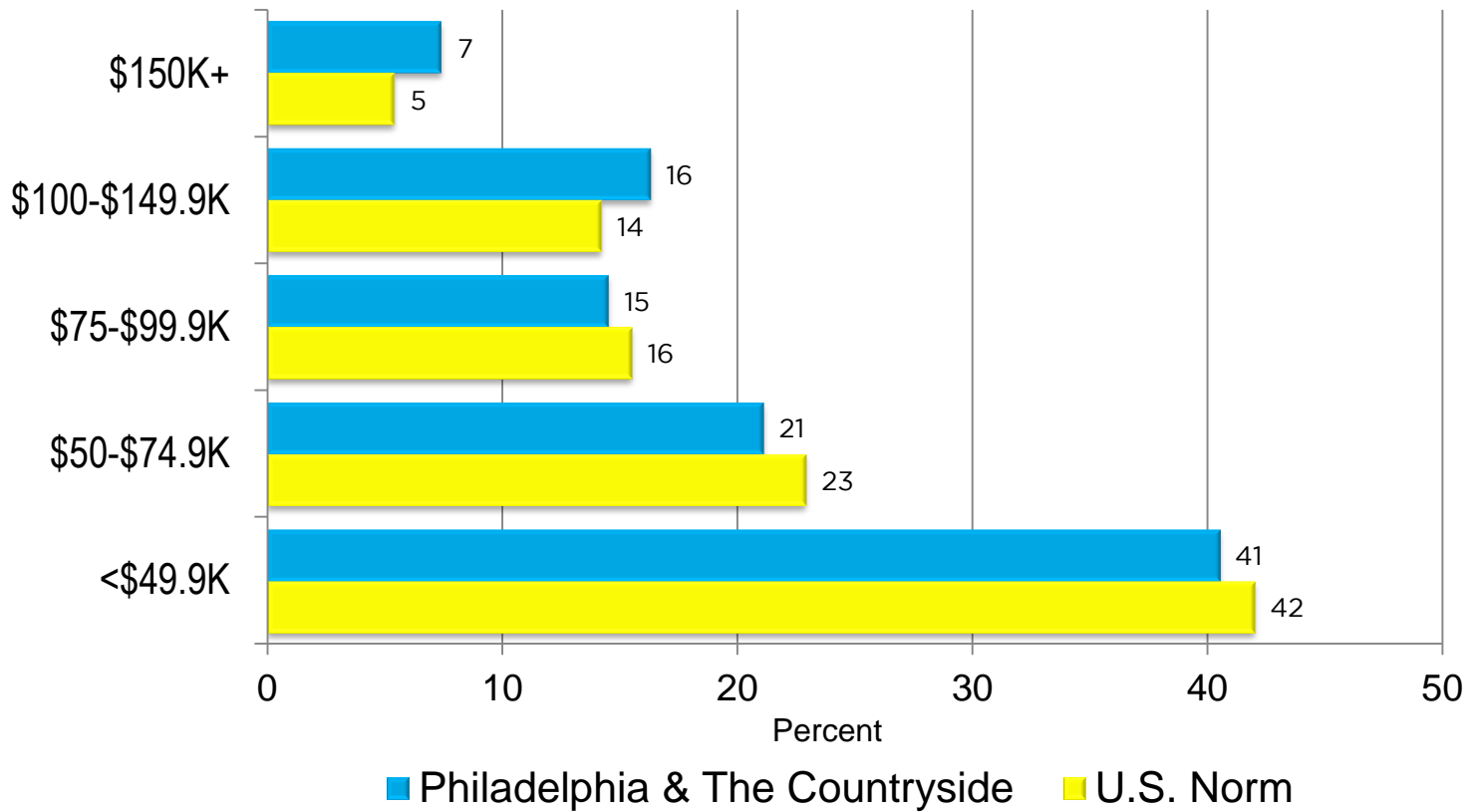
# Employment

Base: Overnight Leisure Person-Trips



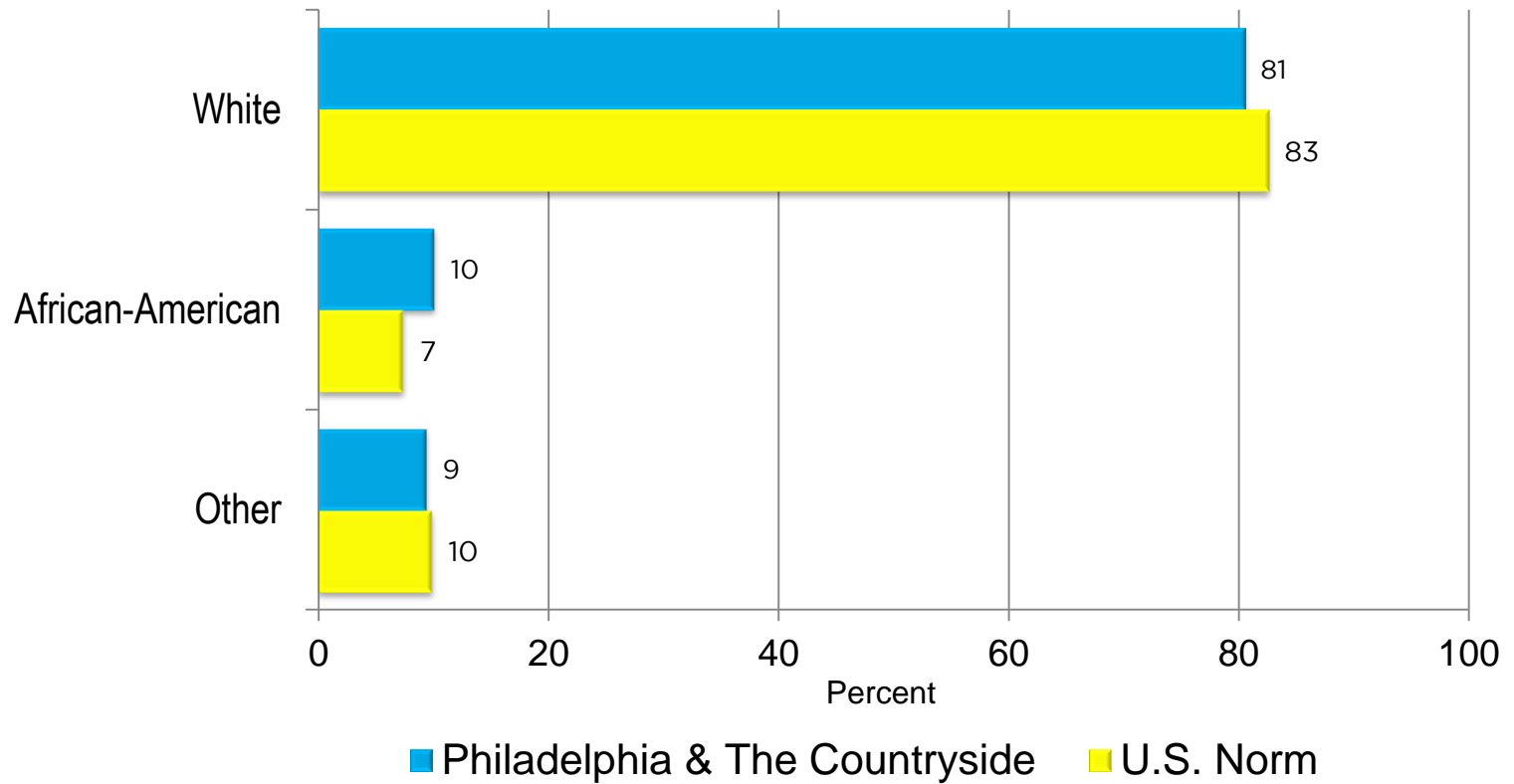
# Household Income

Base: Overnight Leisure Person-Trips

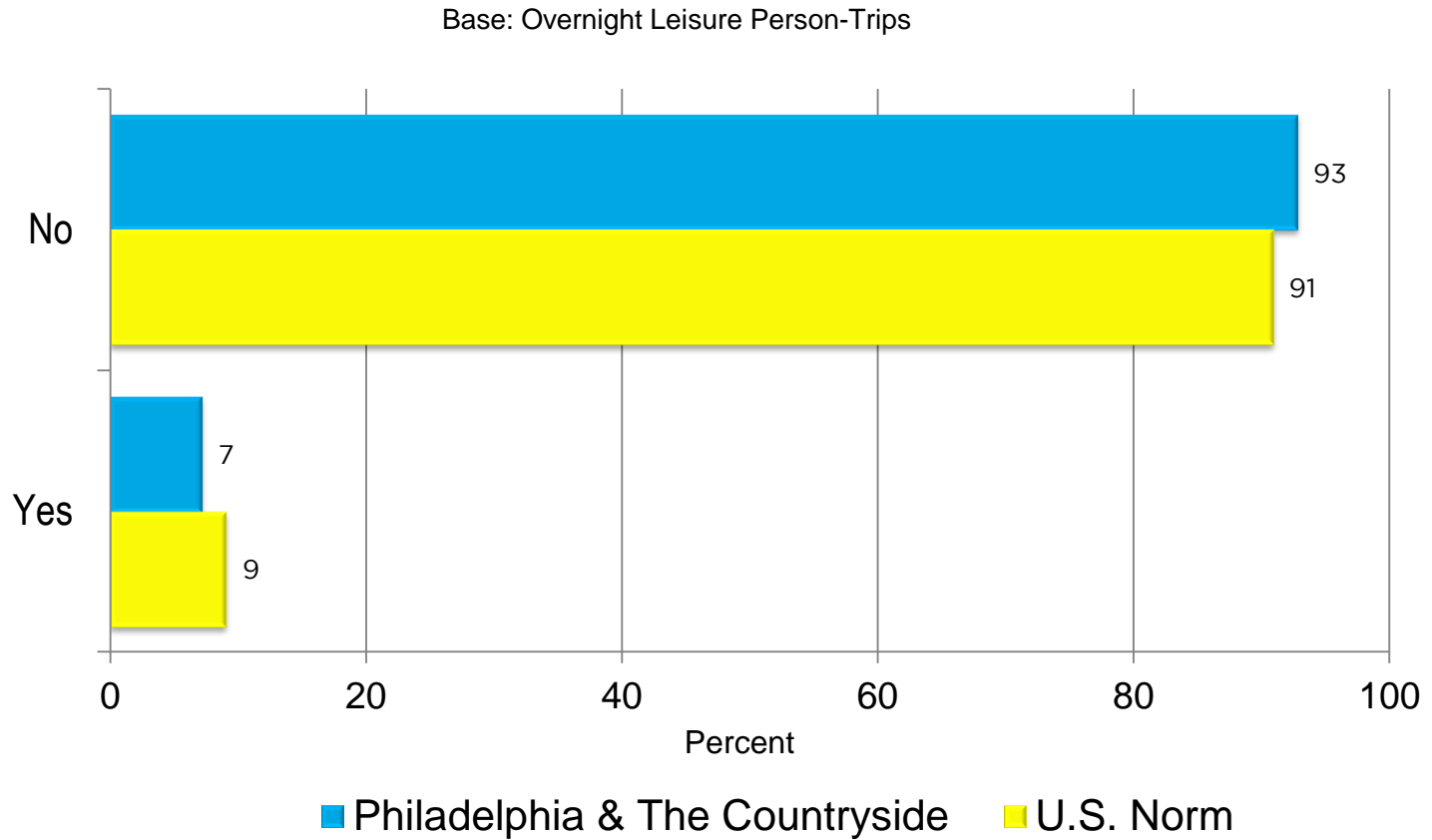


# Race

Base: Overnight Leisure Person-Trips



# Hispanic Background



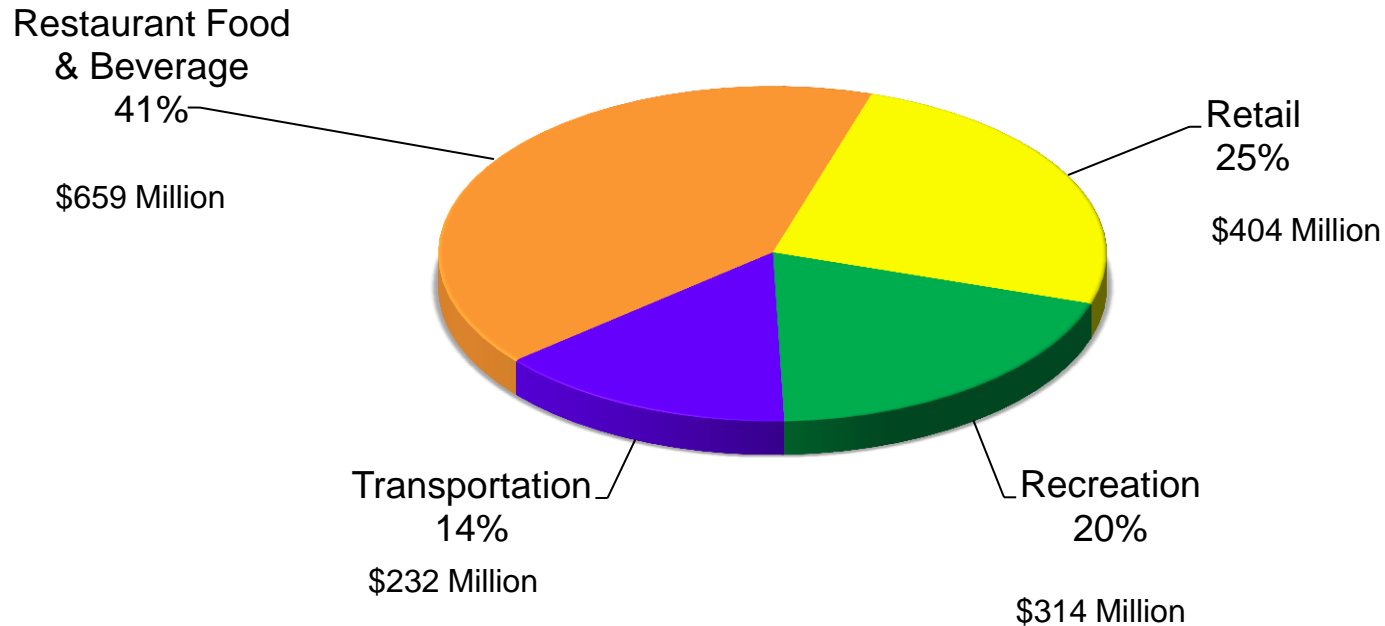
# Day Trip Expenditures



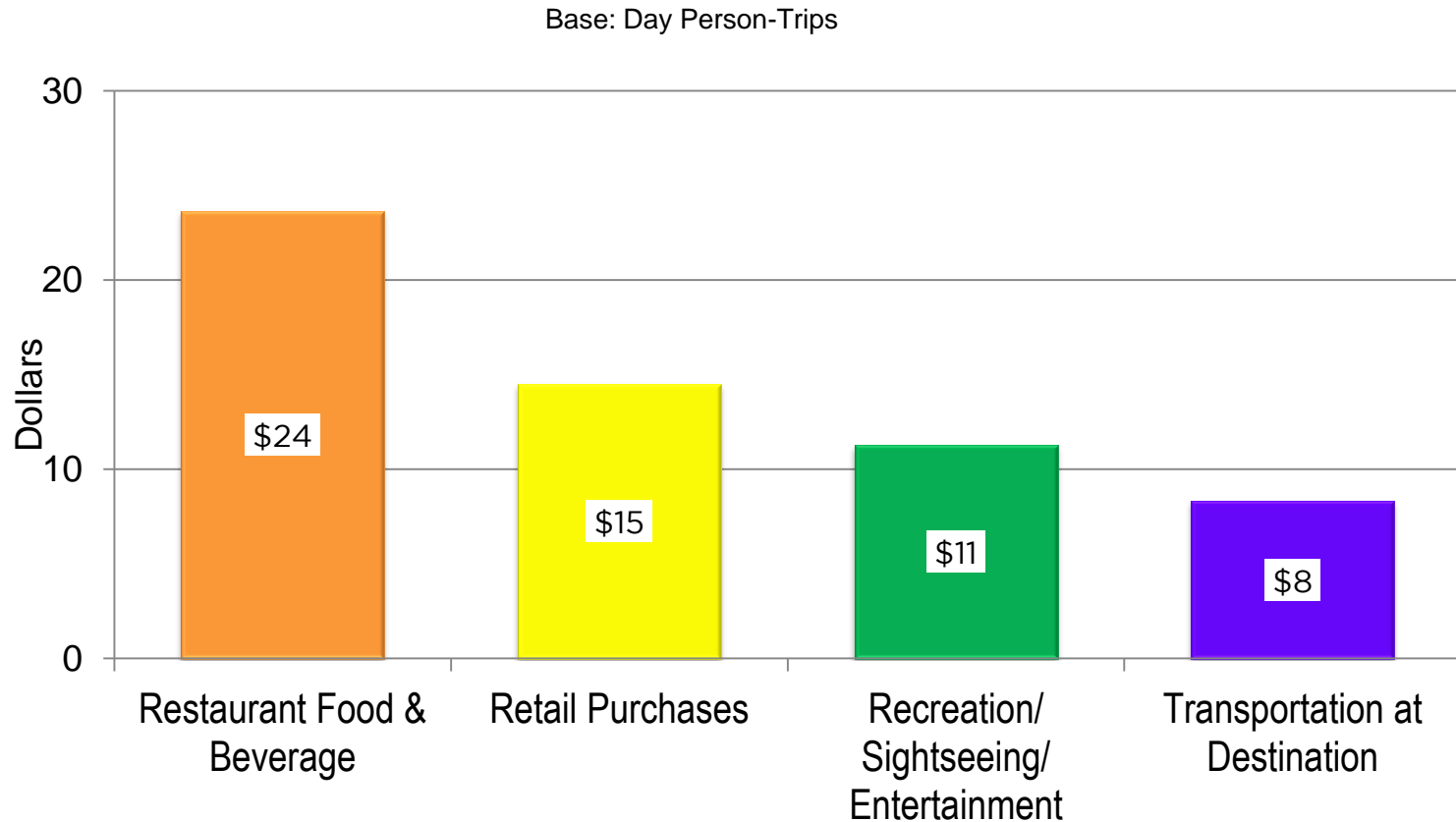
# Total Philadelphia & The Countryside Domestic Day Trip Spending — by Sector

Total Spending = \$1.6 Billion

+2.7% vs. 2016



# Average Per Person Expenditures on Day Trips — By Sector





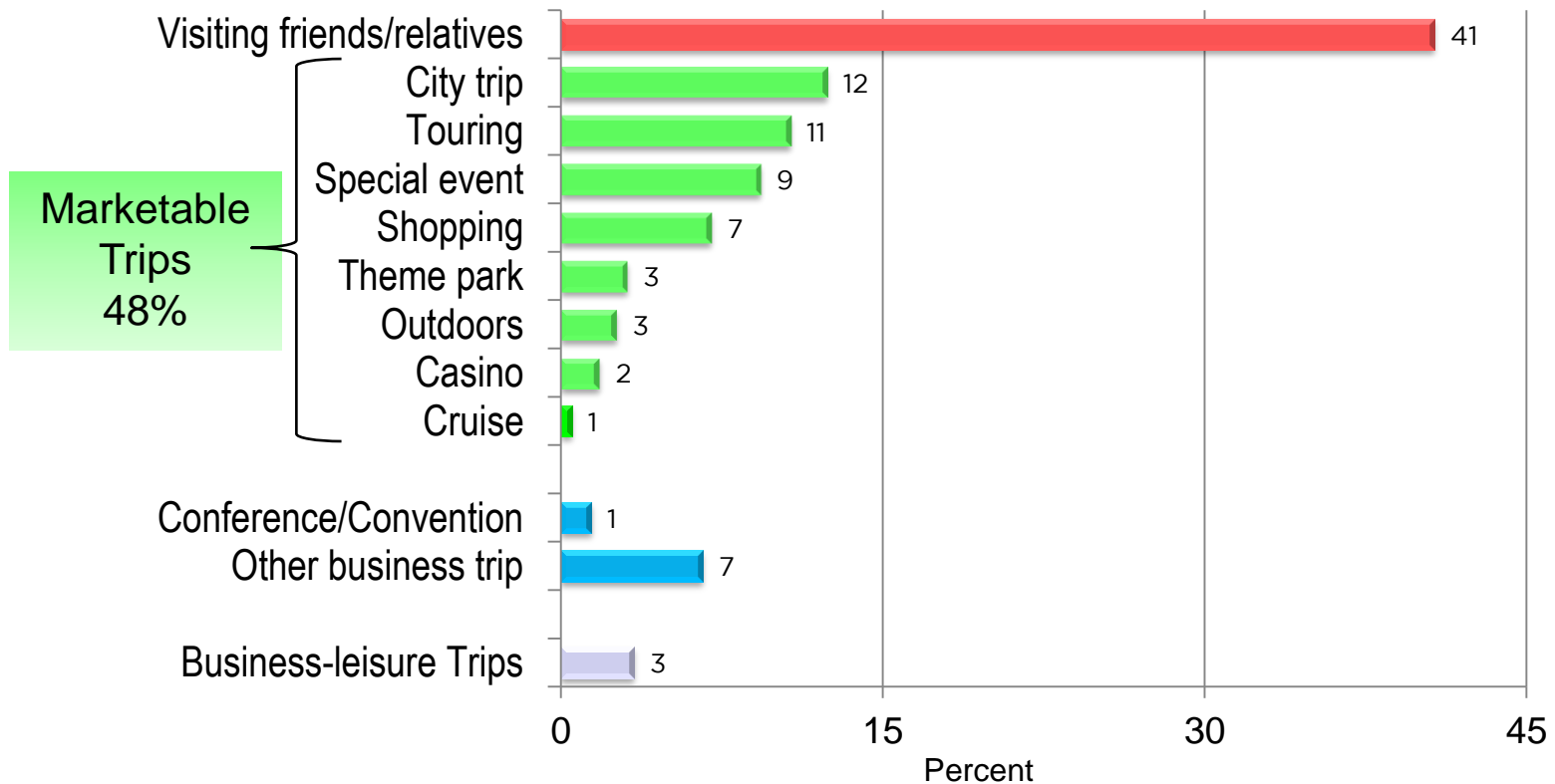
## Day Trip Characteristics



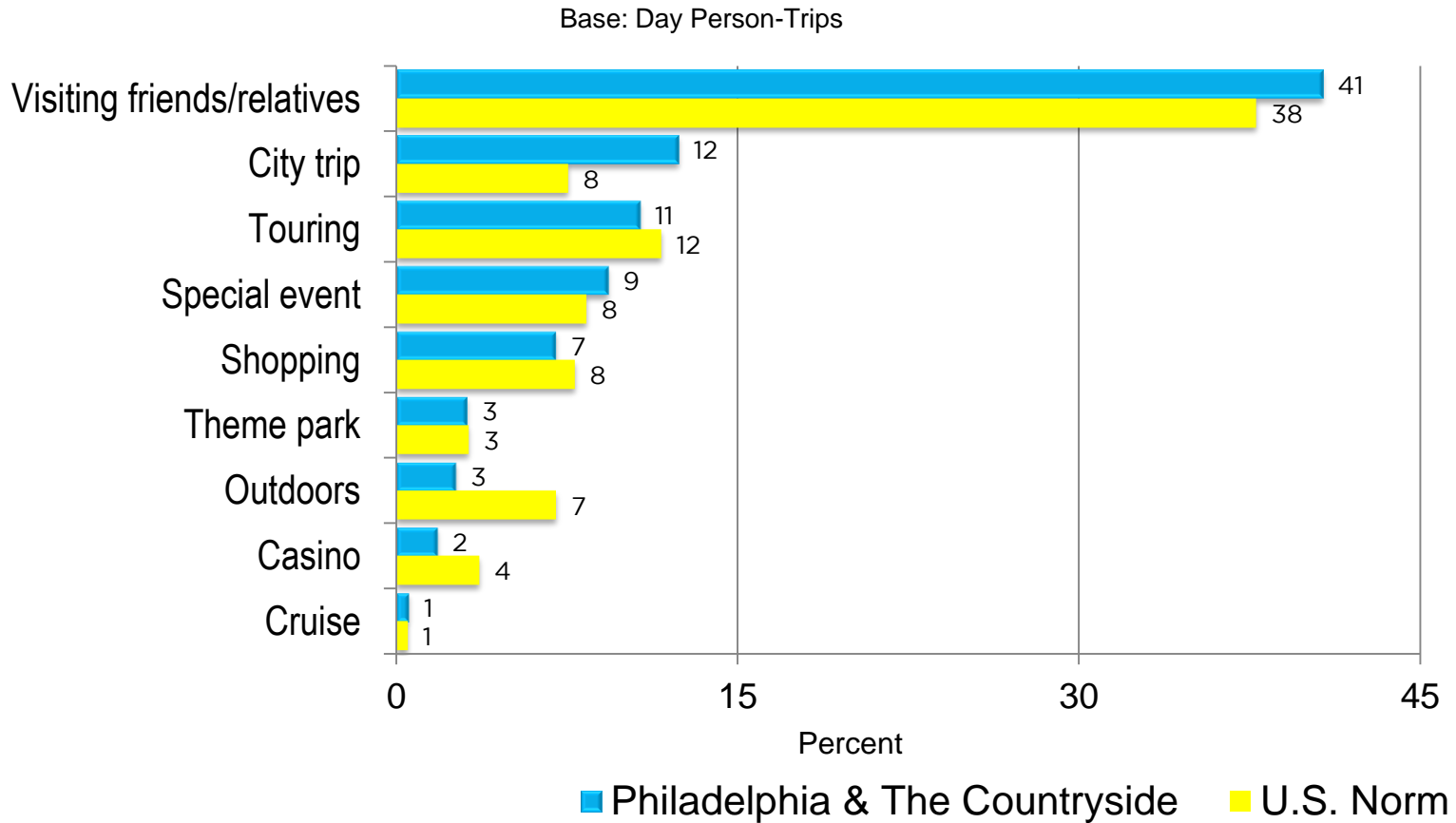


# Main Purpose of Trip

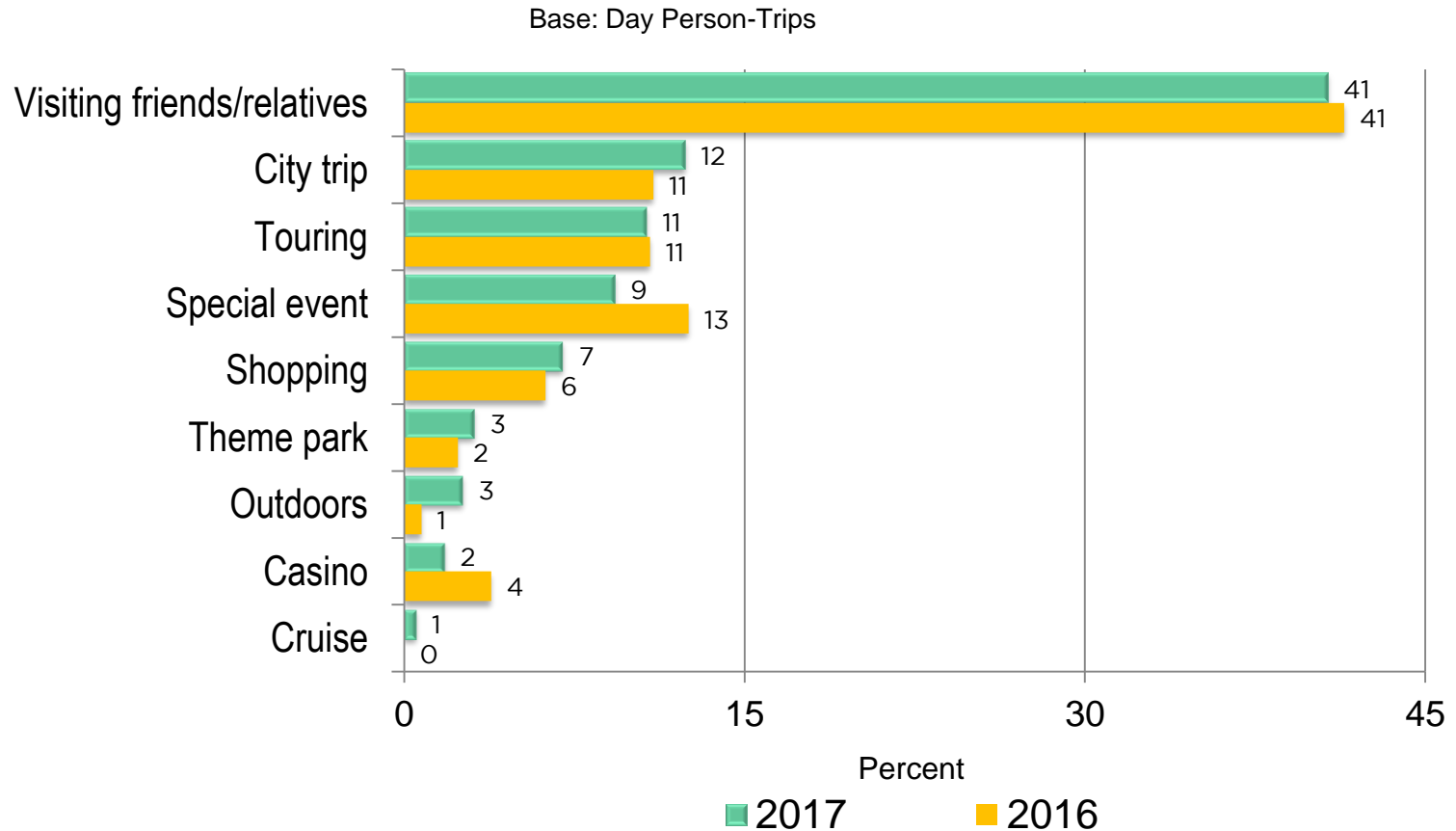
Base: Day Person-Trips



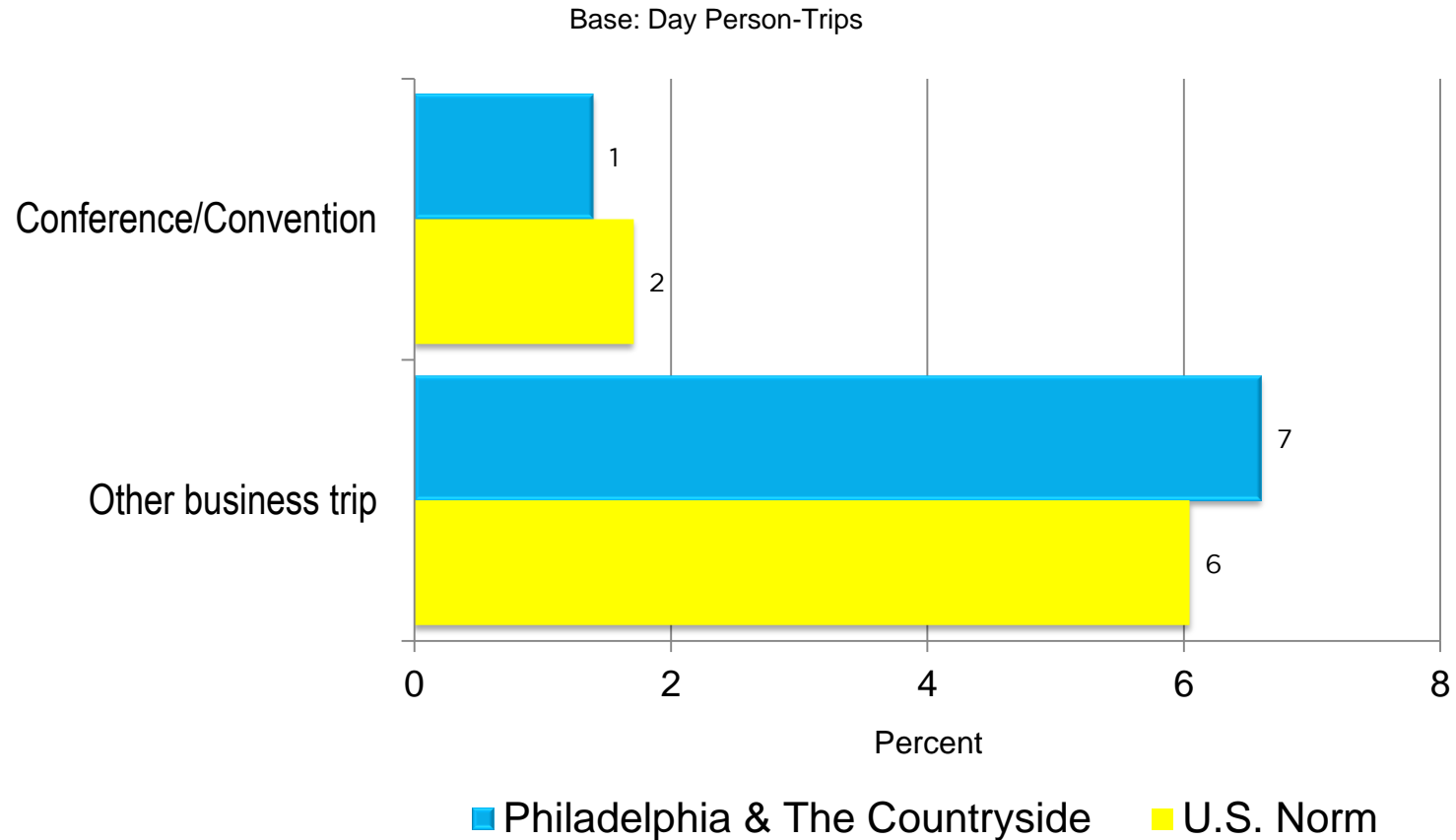
# Main Purpose of Leisure Trip



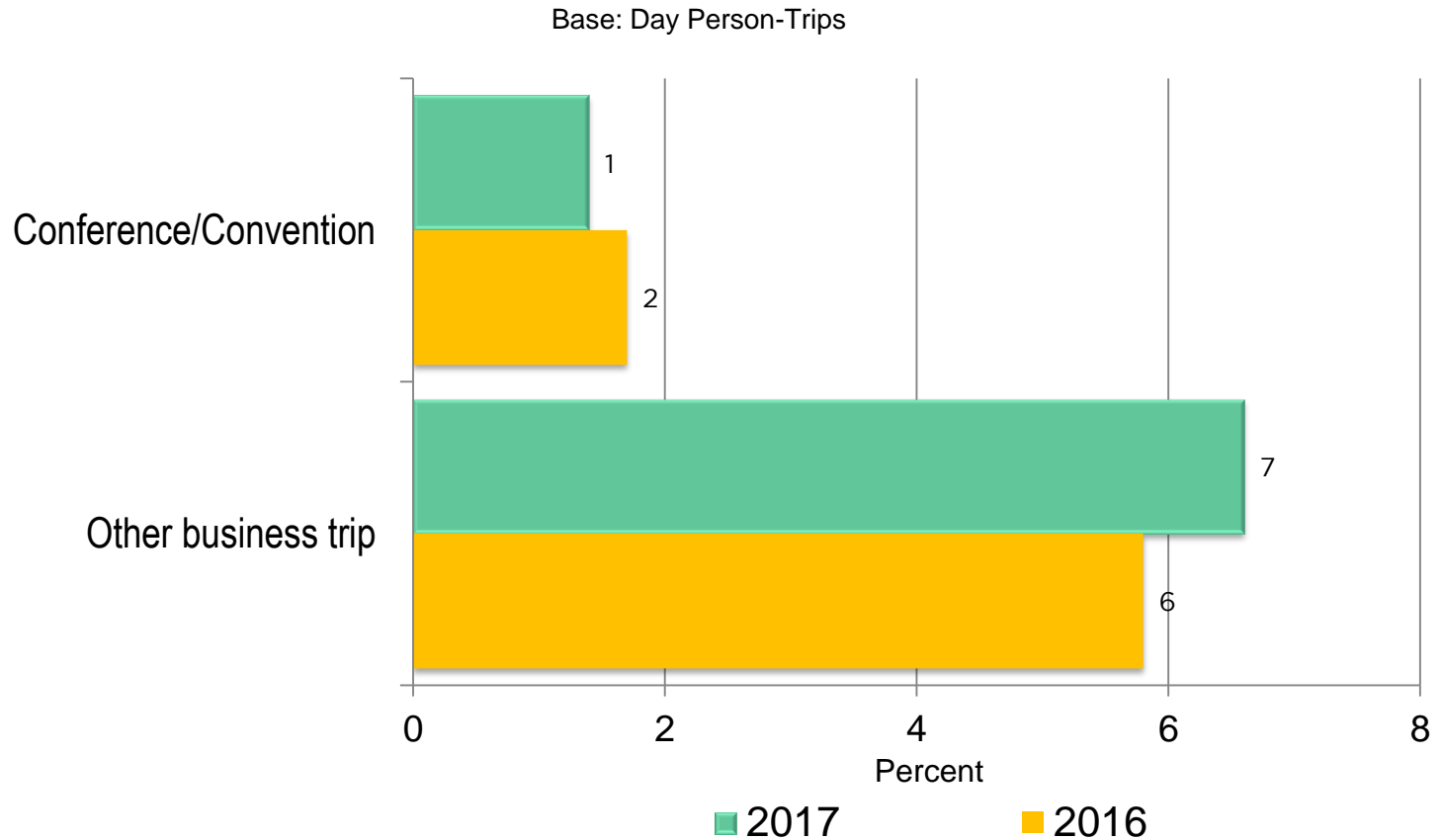
# Main Purpose of Day Leisure Trip — 2017 vs. 2016



# Main Purpose of Day Business Trip



# Main Purpose of Day Business Trip — 2017 vs. 2016

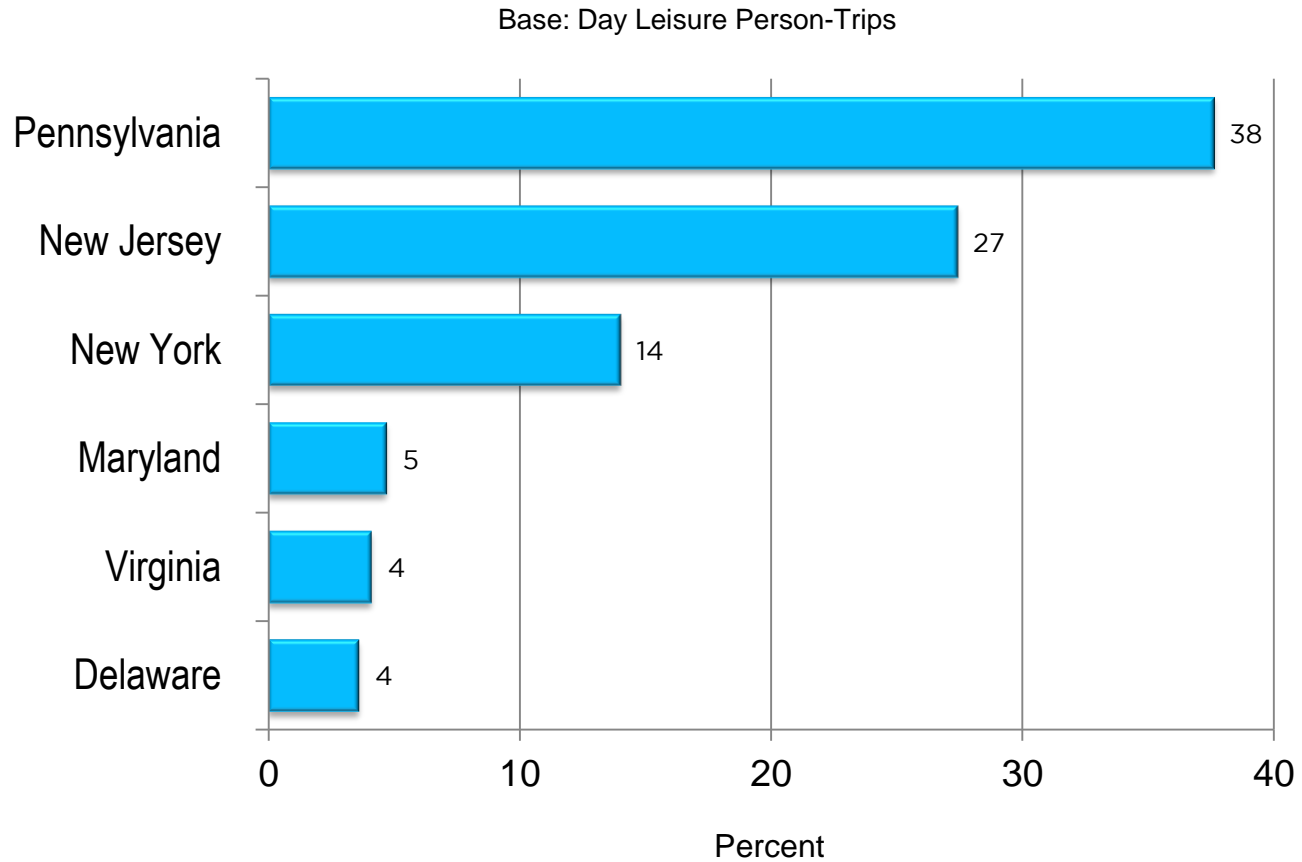


# Sources of Business

Base: Day Leisure Person-Trips

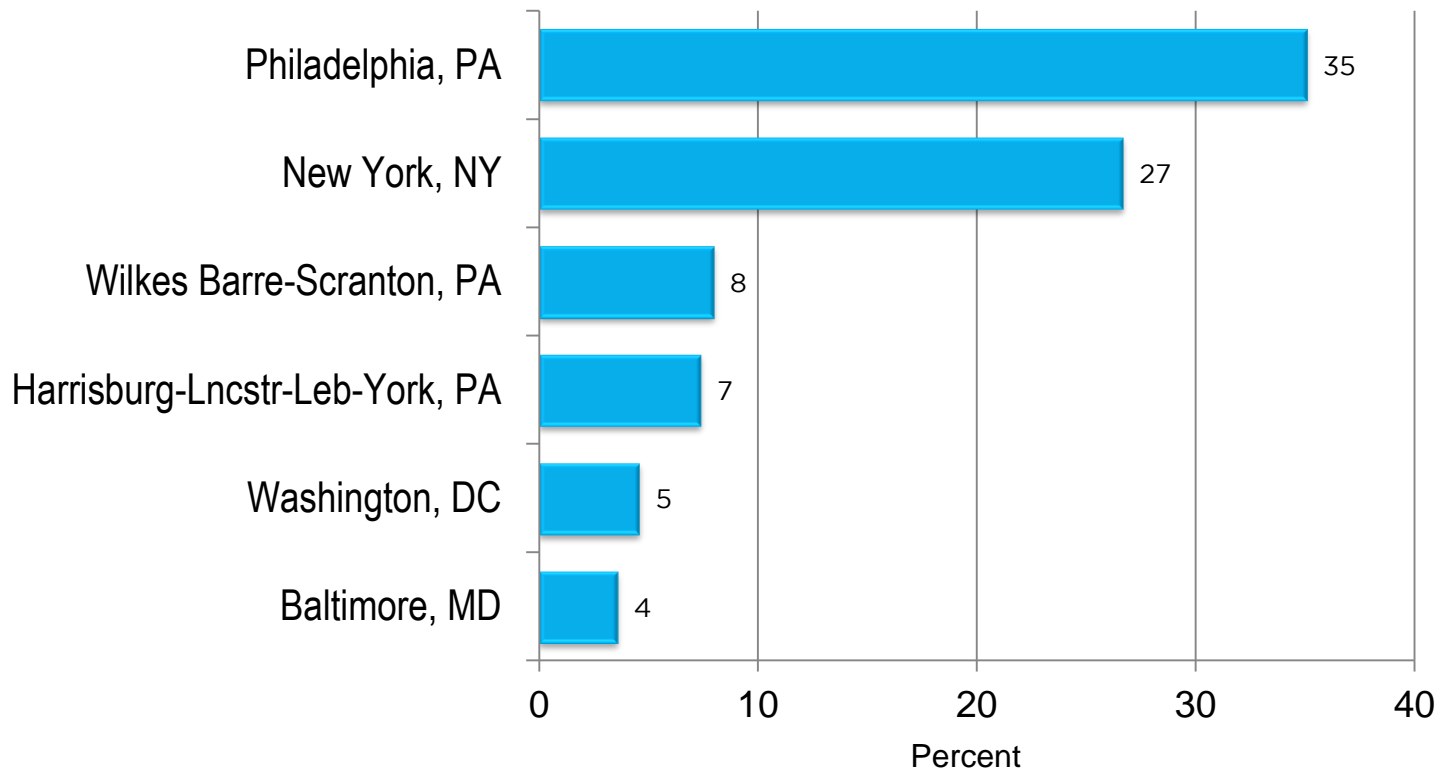


# State Origin Of Trip



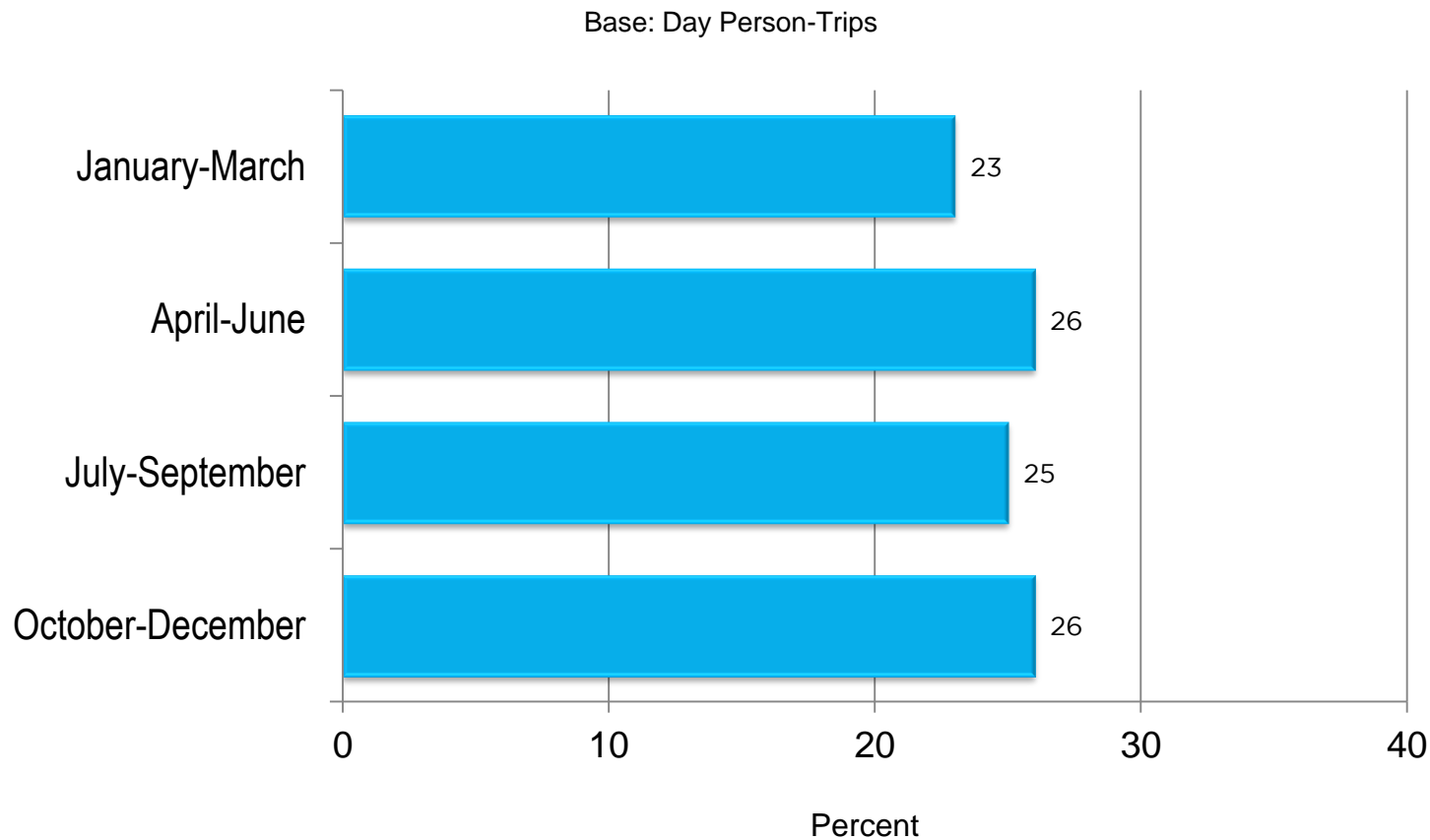
# DMA Origin Of Trip

Base: Day Leisure Person-Trips

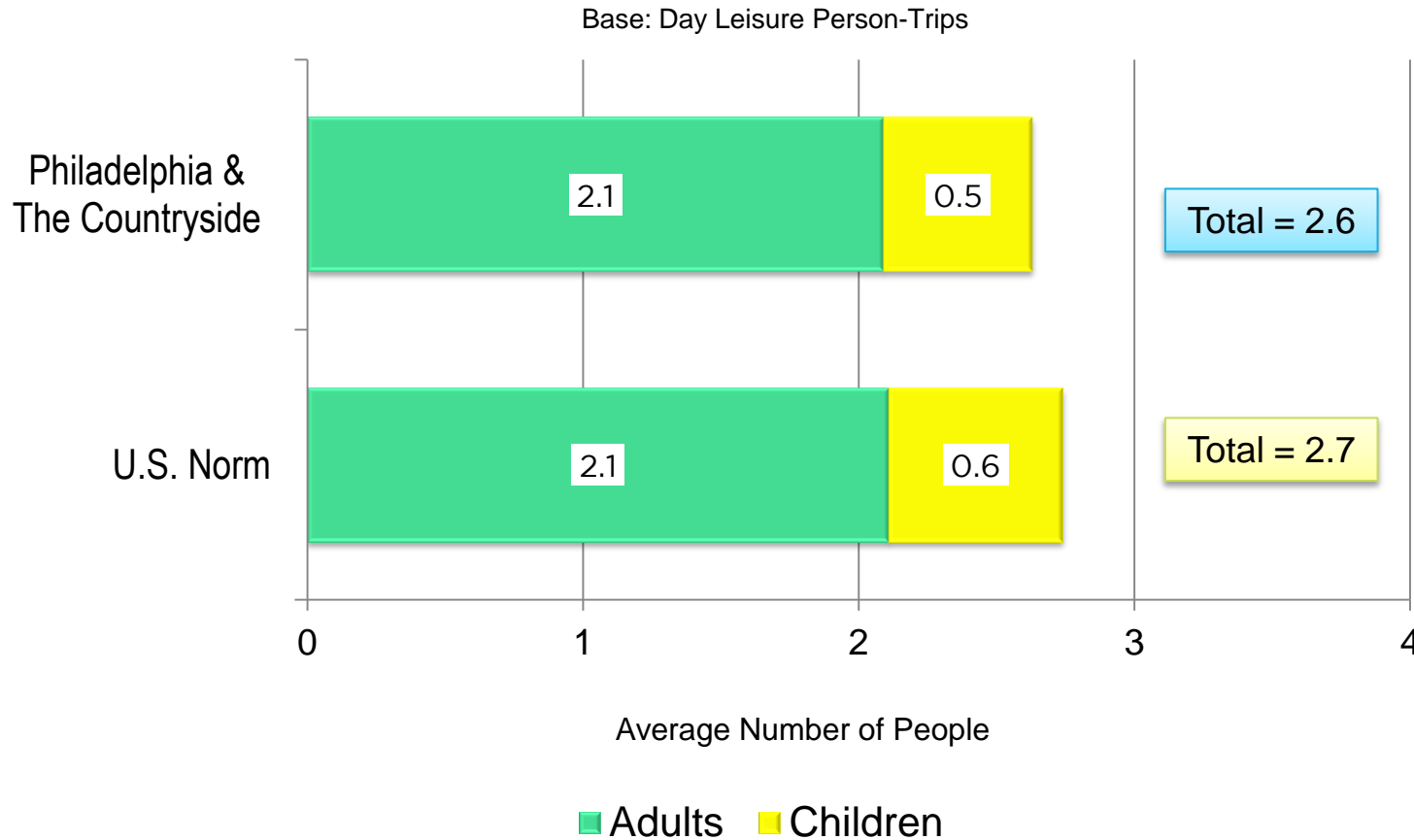




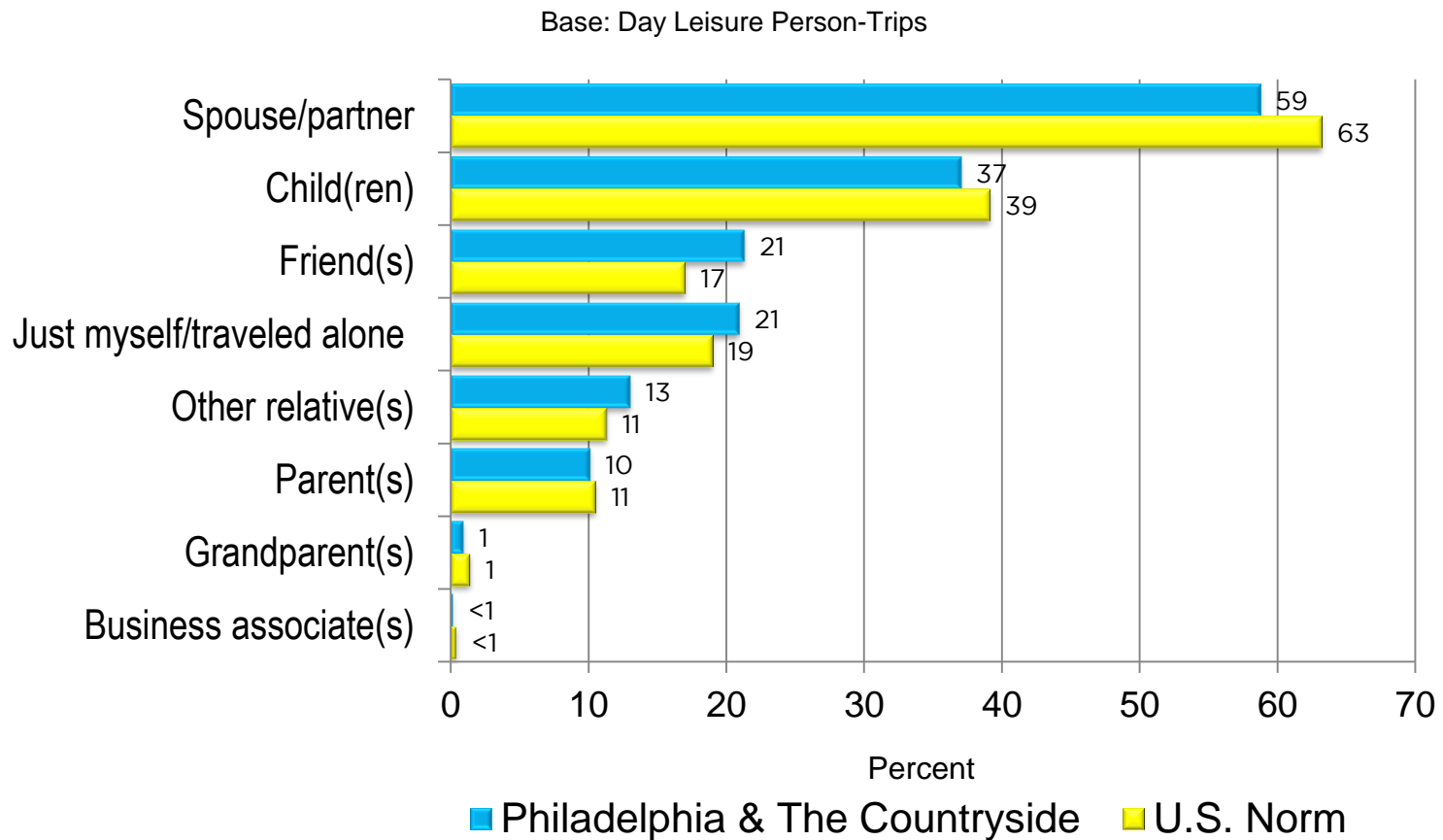
# Season of Trip



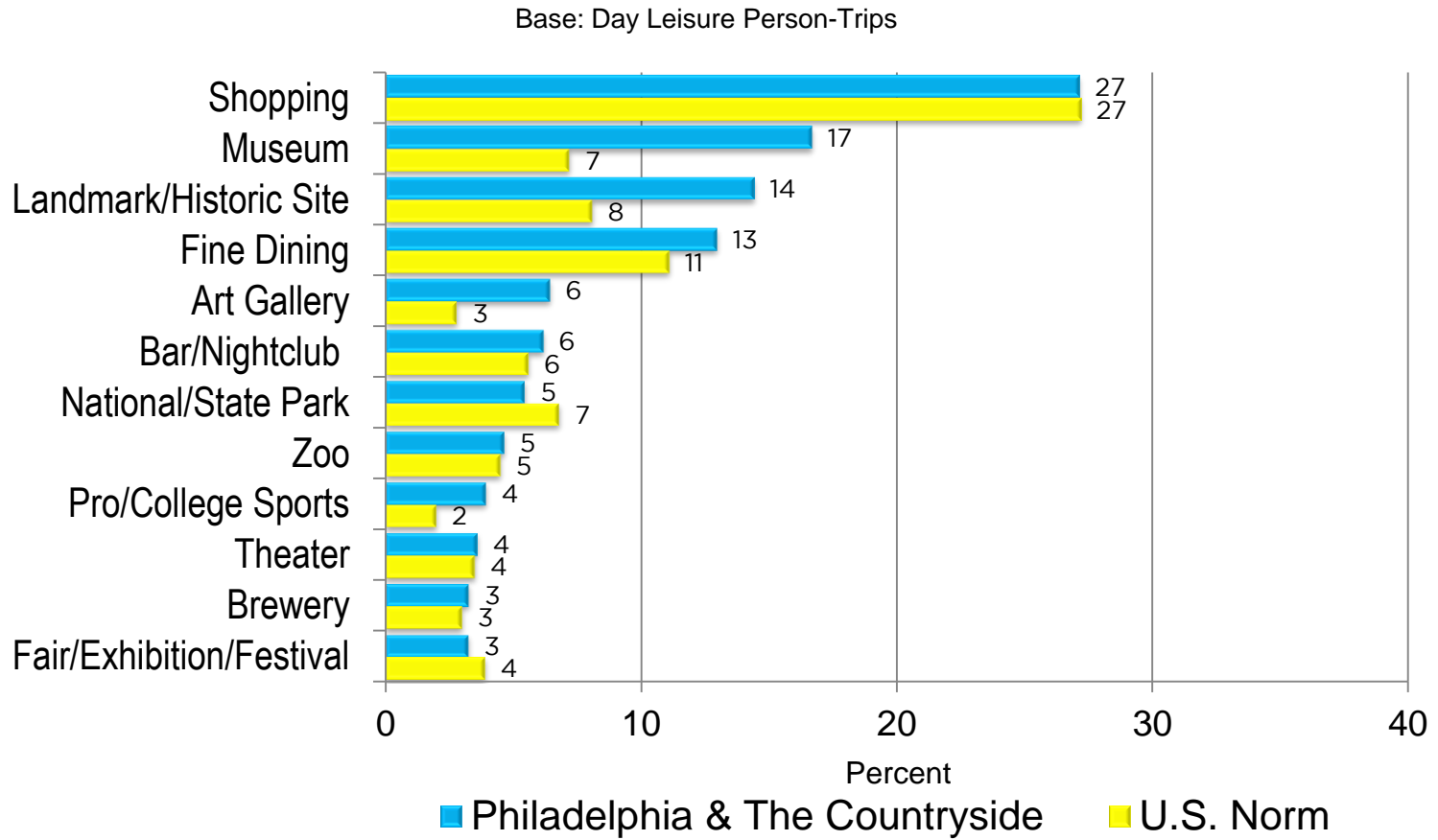
# Size of Travel Party



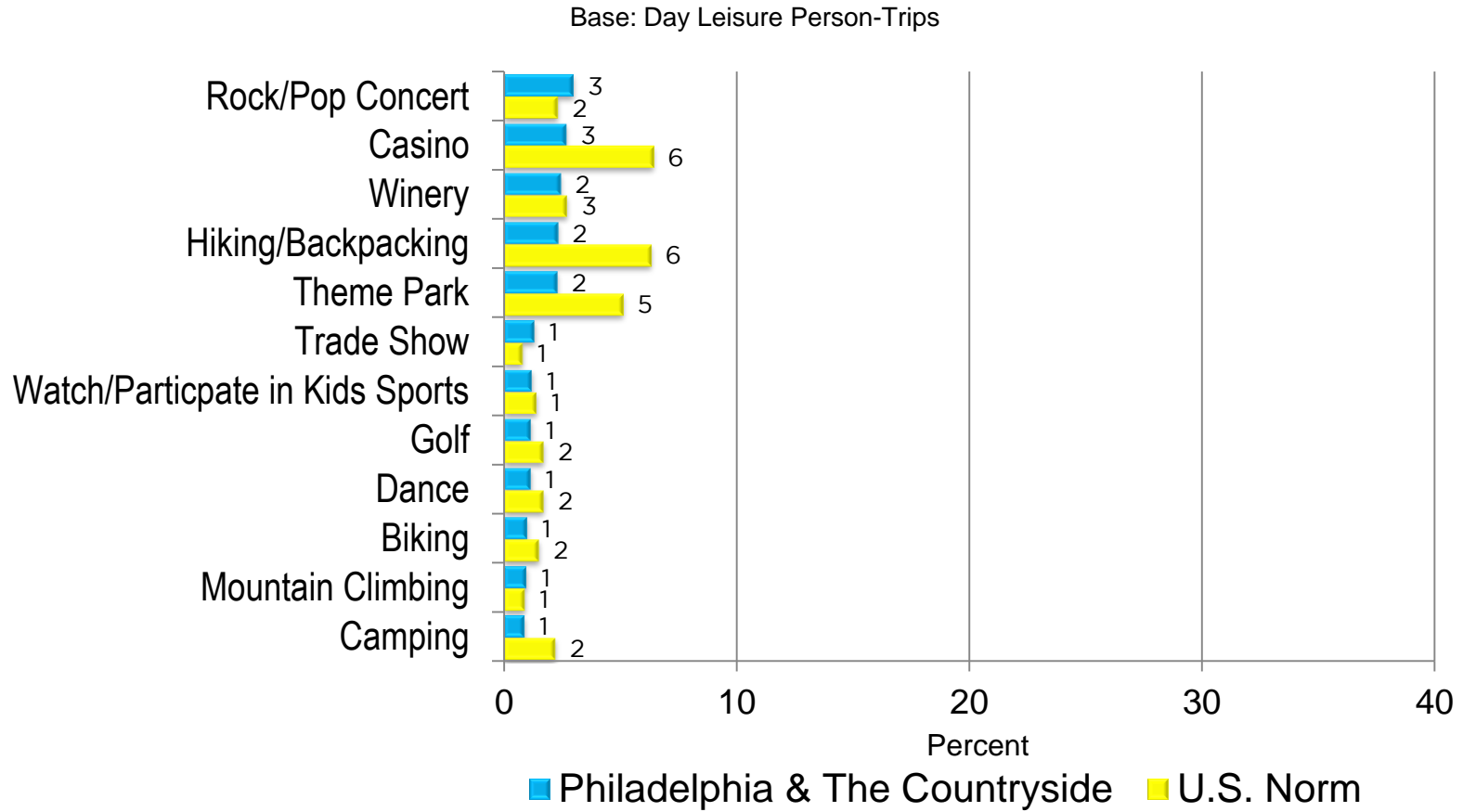
# Composition of Immediate Travel Party



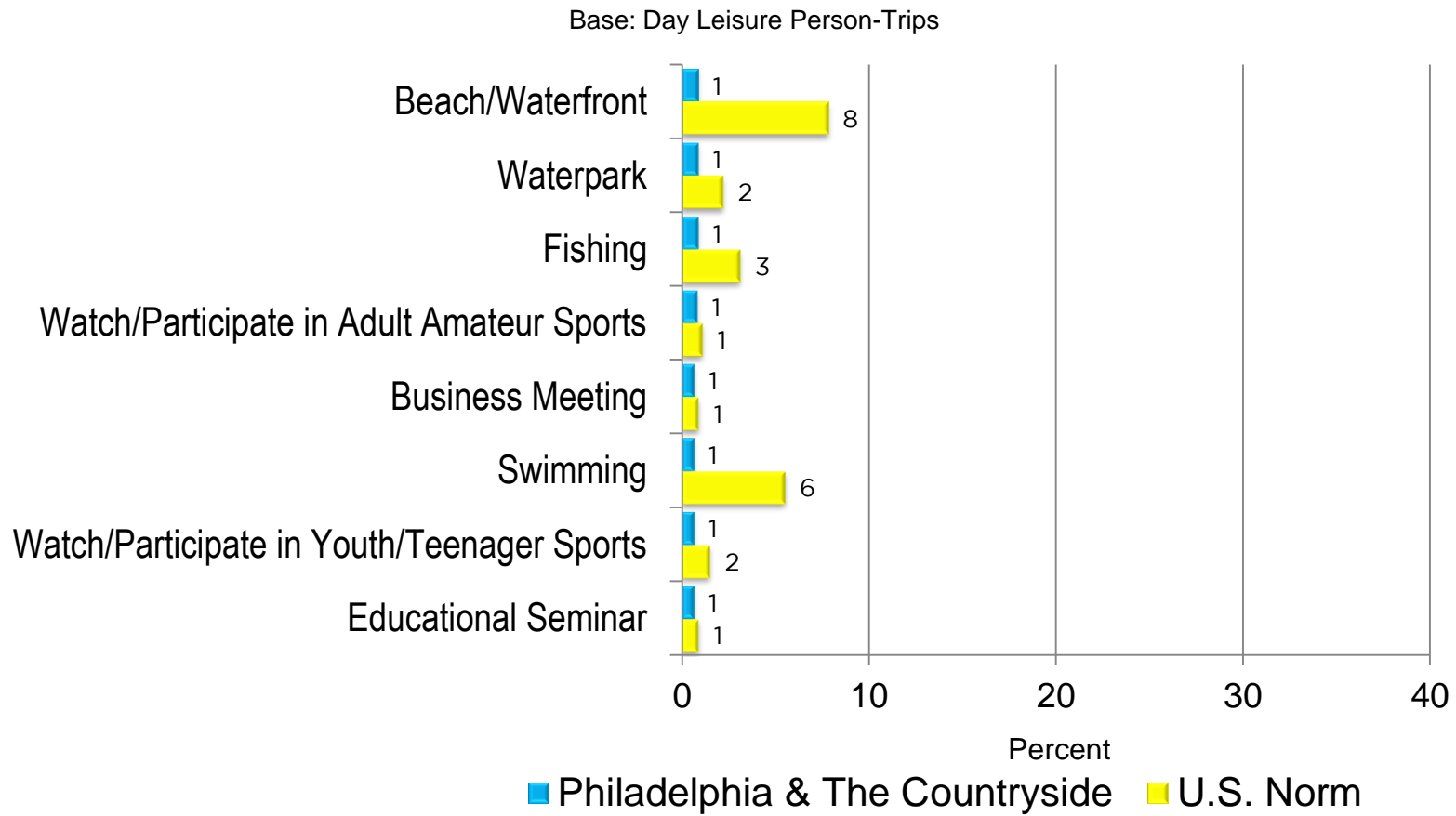
# Activities and Experiences



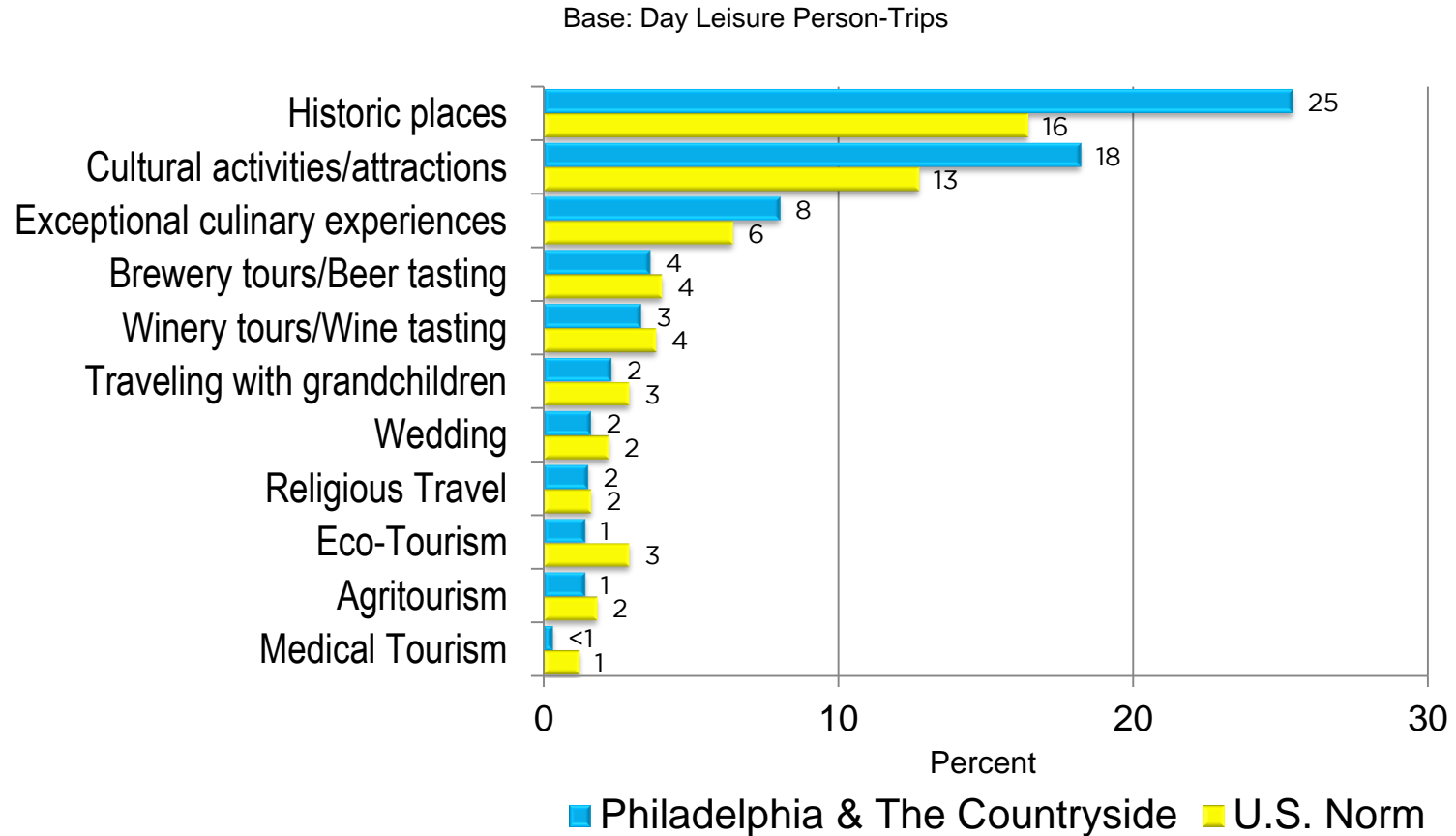
# Activities and Experiences (Cont'd)



# Activities and Experiences (Cont'd)



# Activities of Special Interest



# Online Social Media Use by Travelers

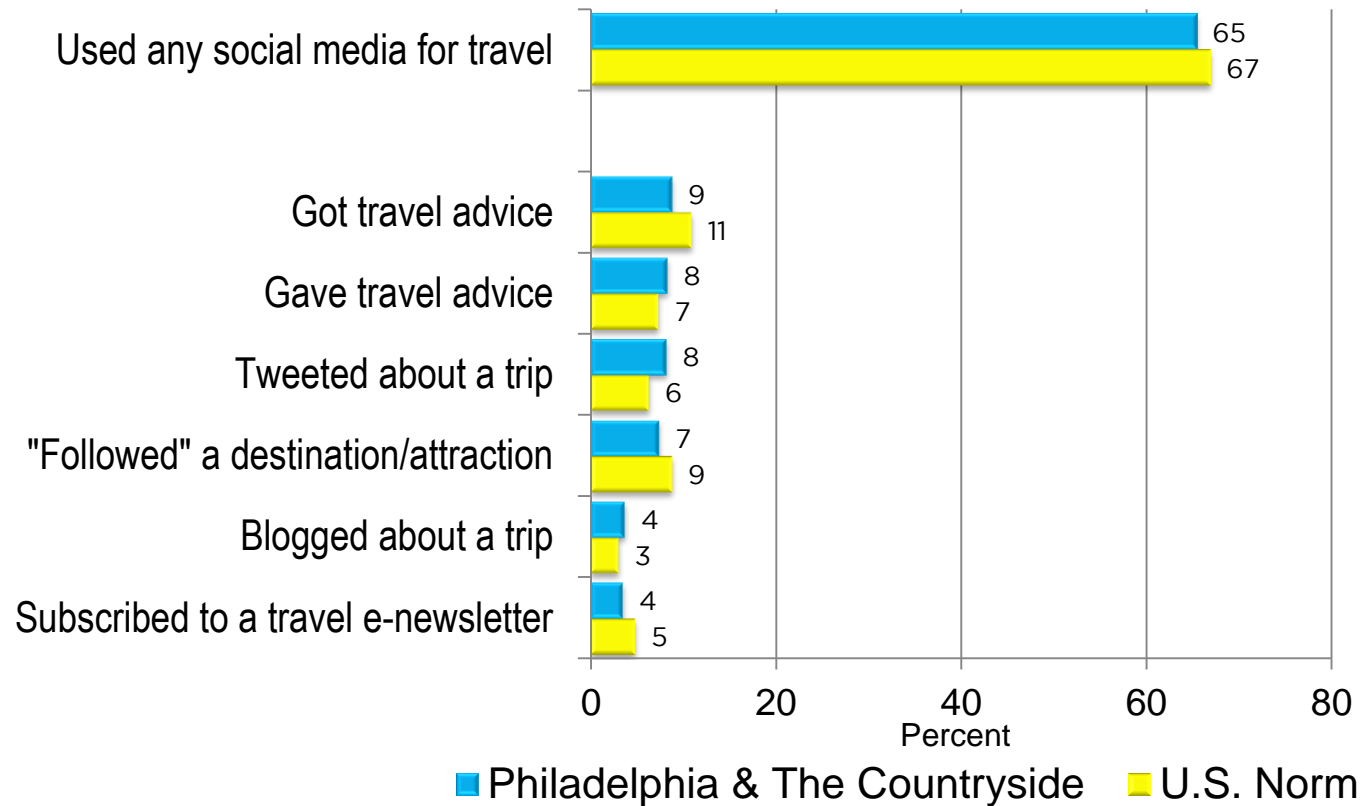
Base: Day Leisure Person-Trips





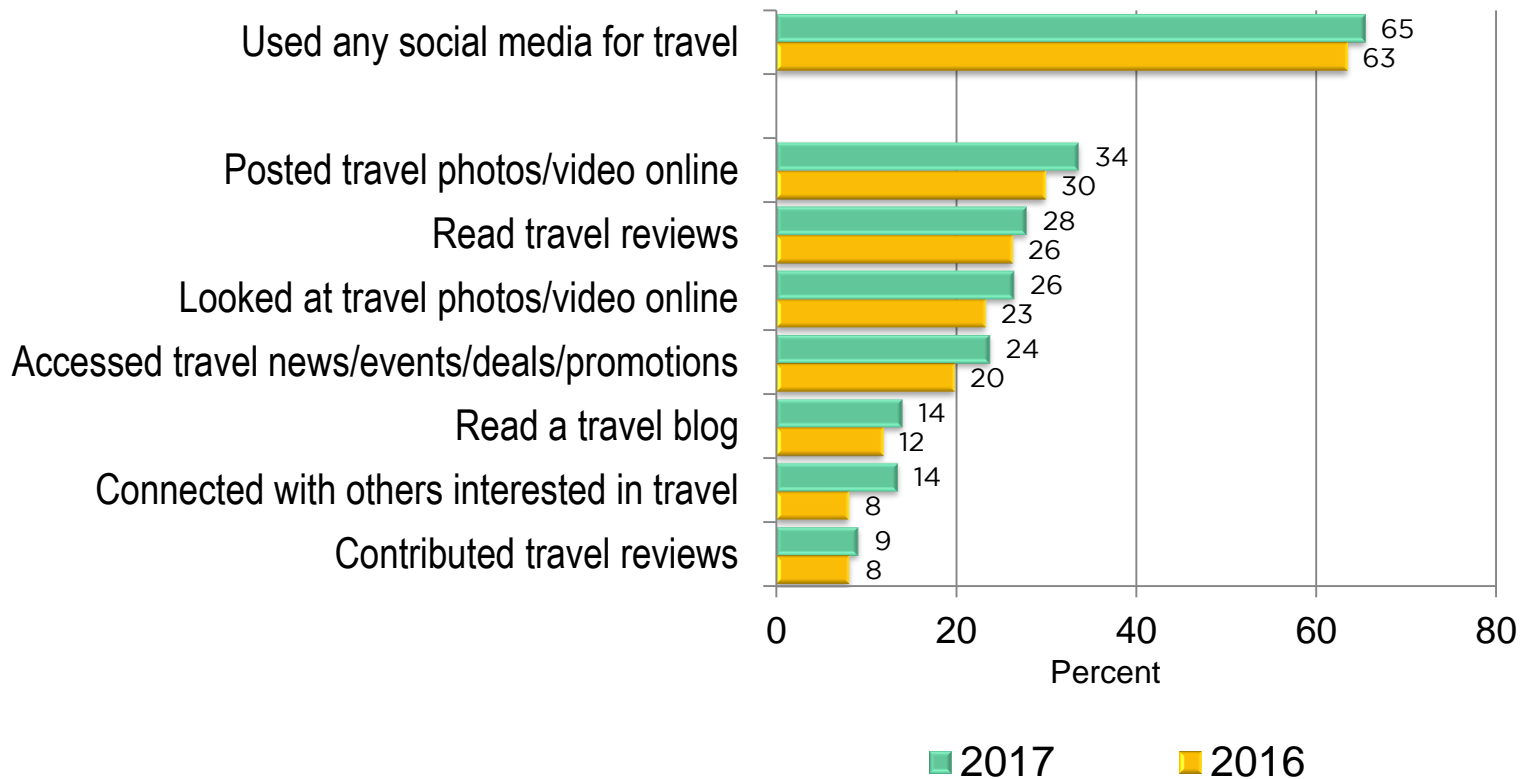
# Online Social Media Use by Travelers (Cont'd)

Base: Day Leisure Person-Trips



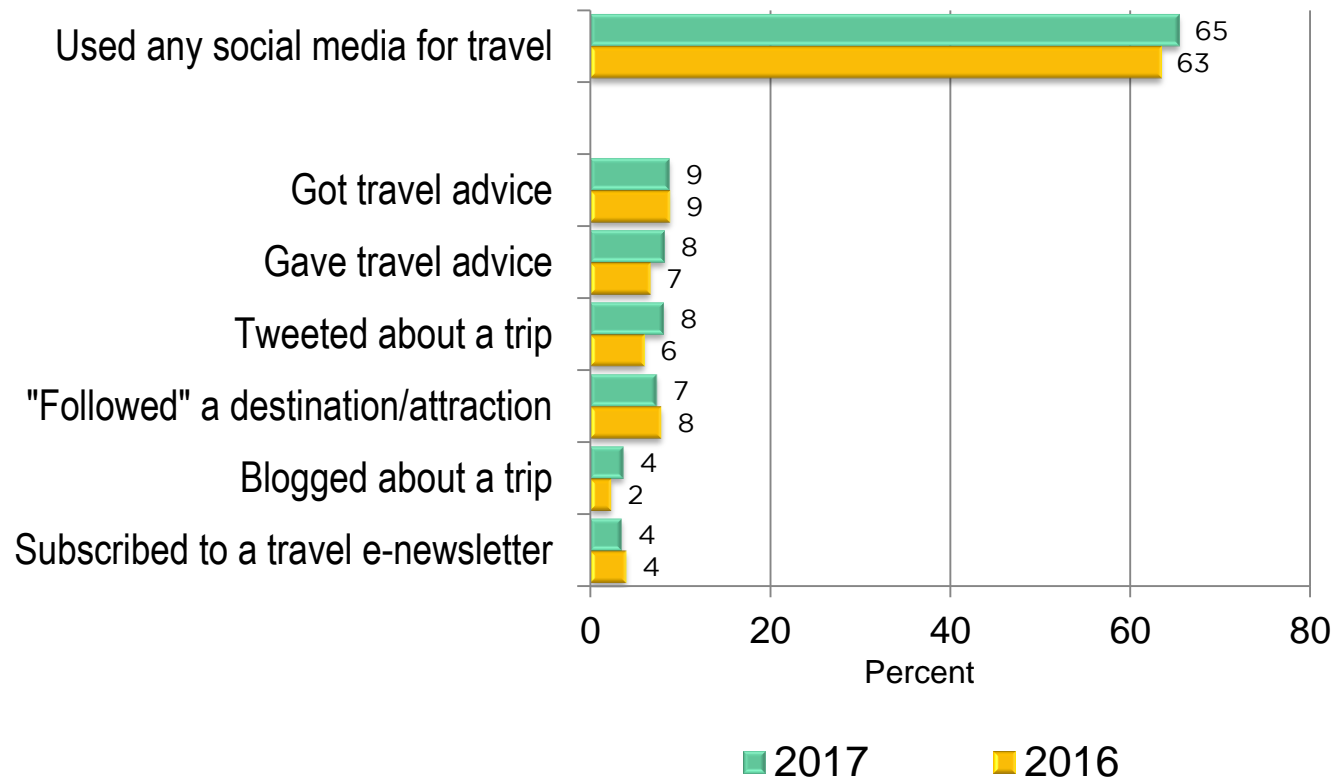
# Online Social Media Use by Travelers – 2017 vs. 2016

Base: Day Leisure Person-Trips

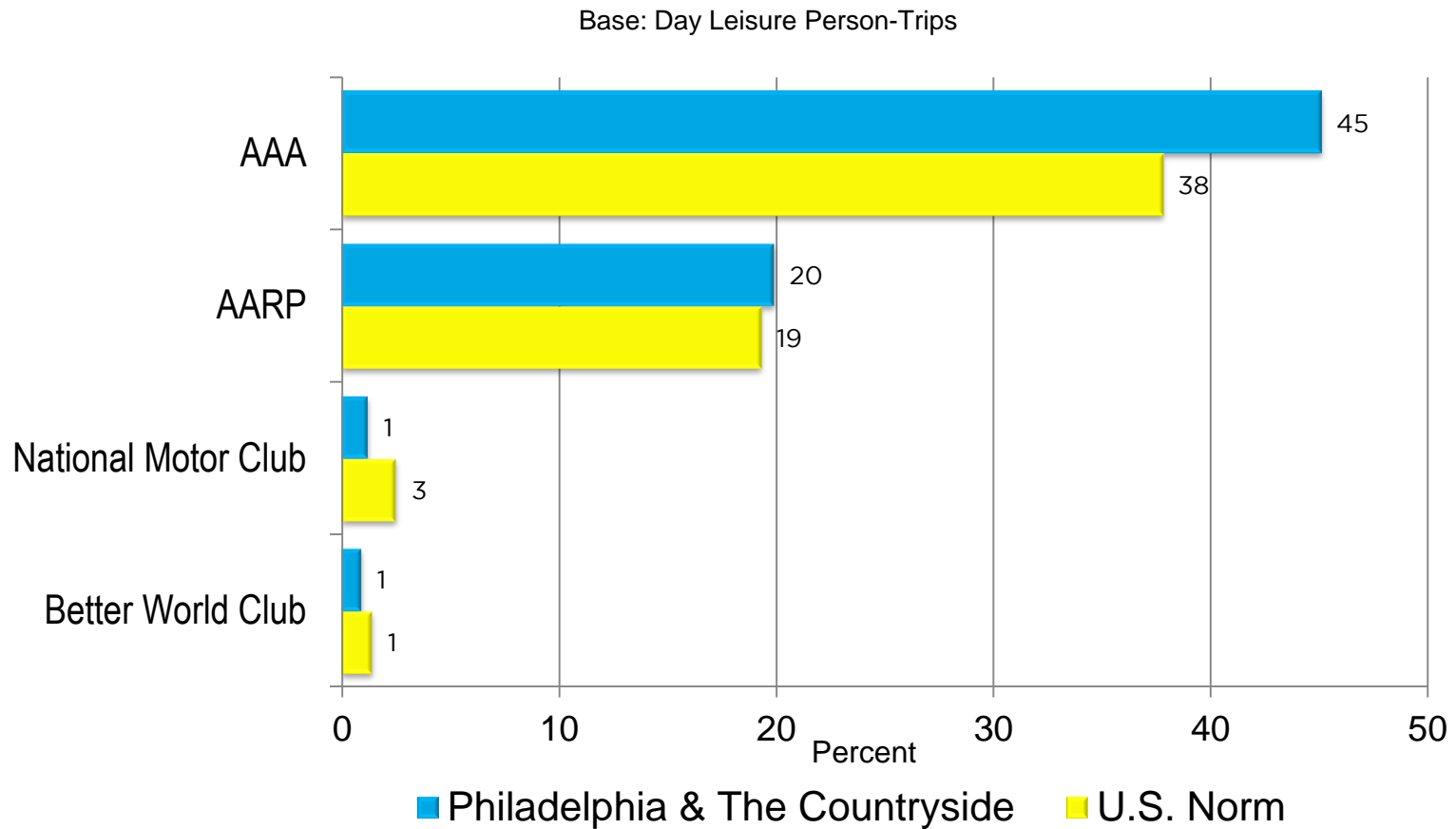


# Online Social Media Use by Travelers – 2017 vs. 2016 (Cont'd)

Base: Day Leisure Person-Trips



# Organization Membership

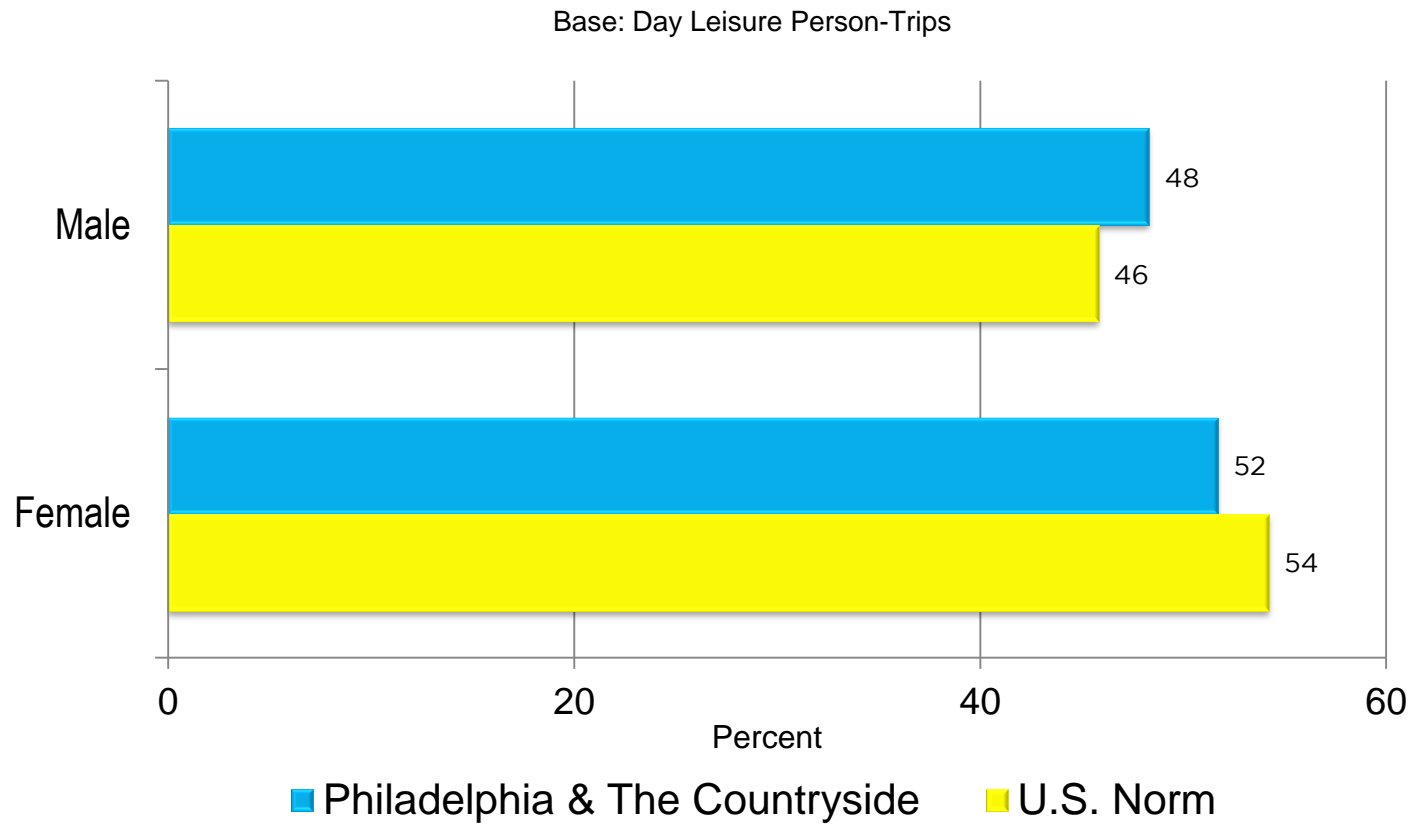




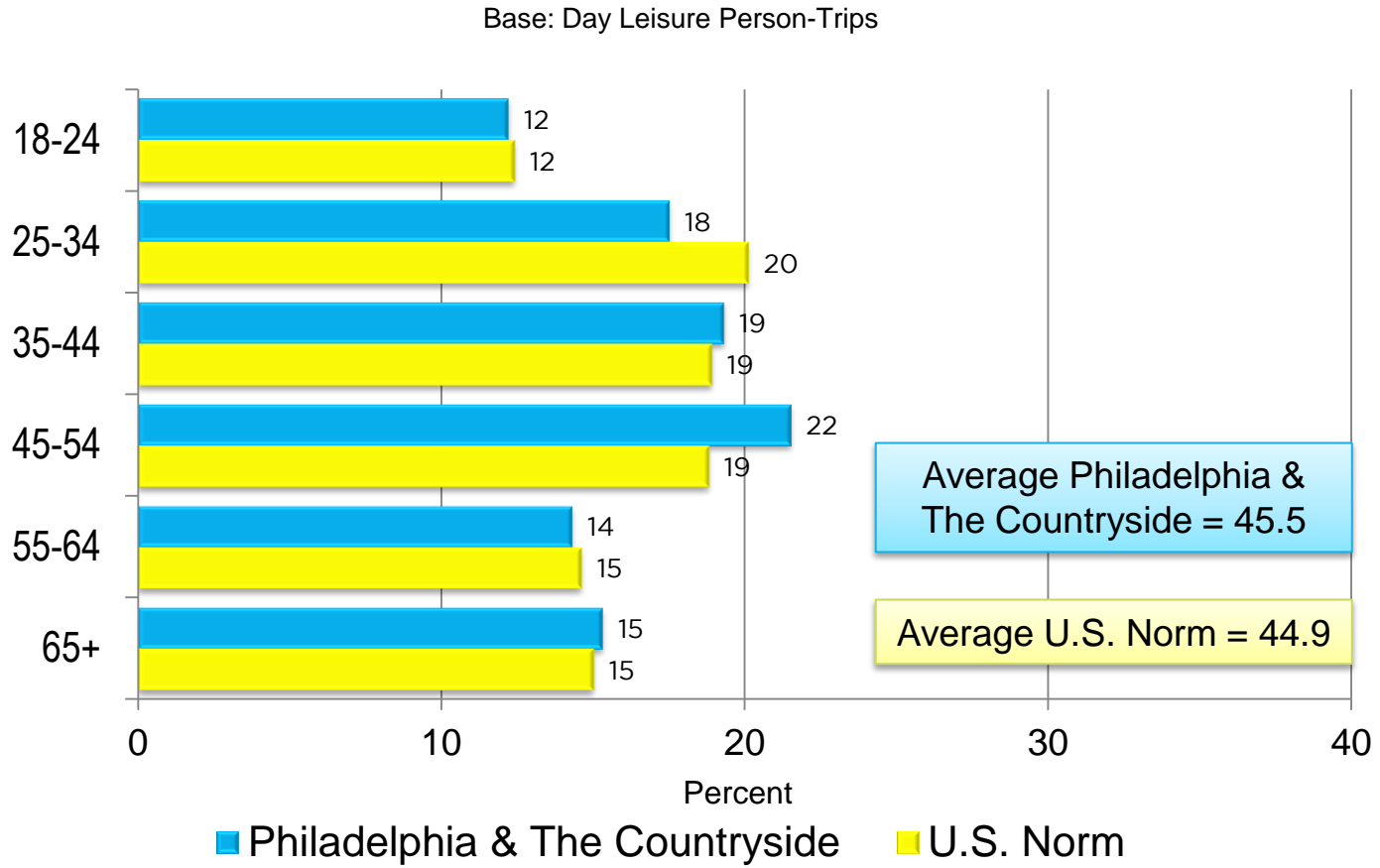
## Demographic Profile of Day Visitors



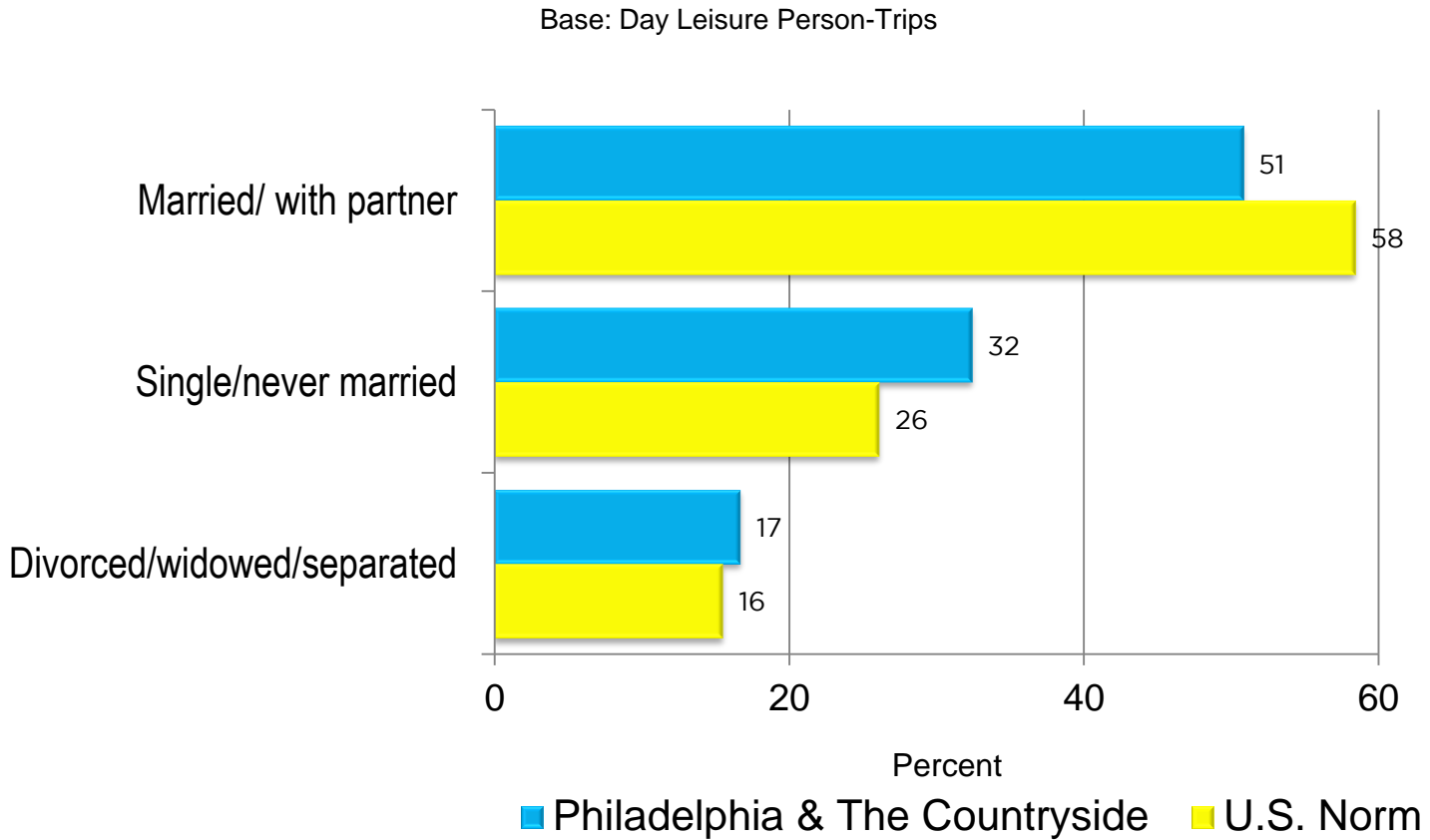
# Gender



# Age

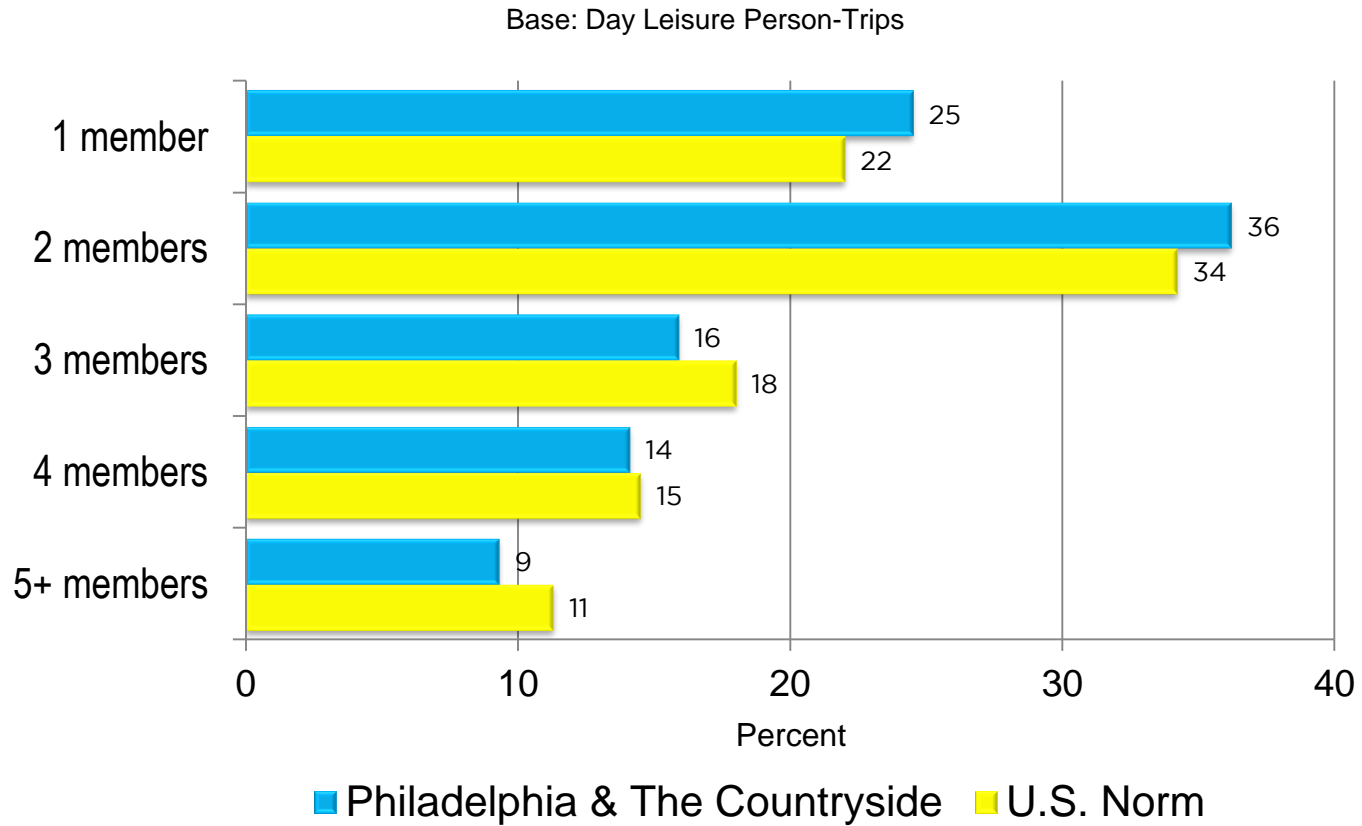


# Marital Status

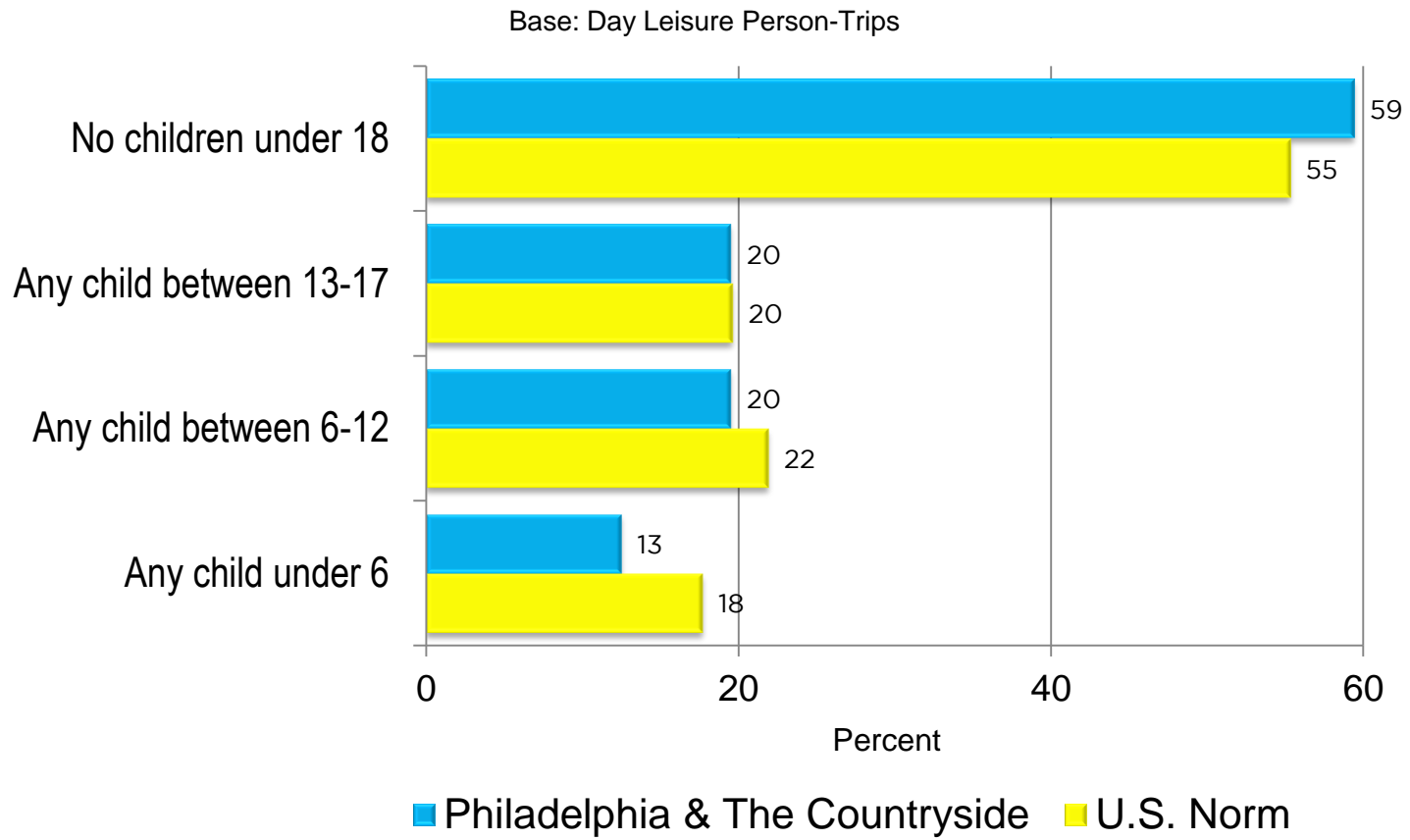




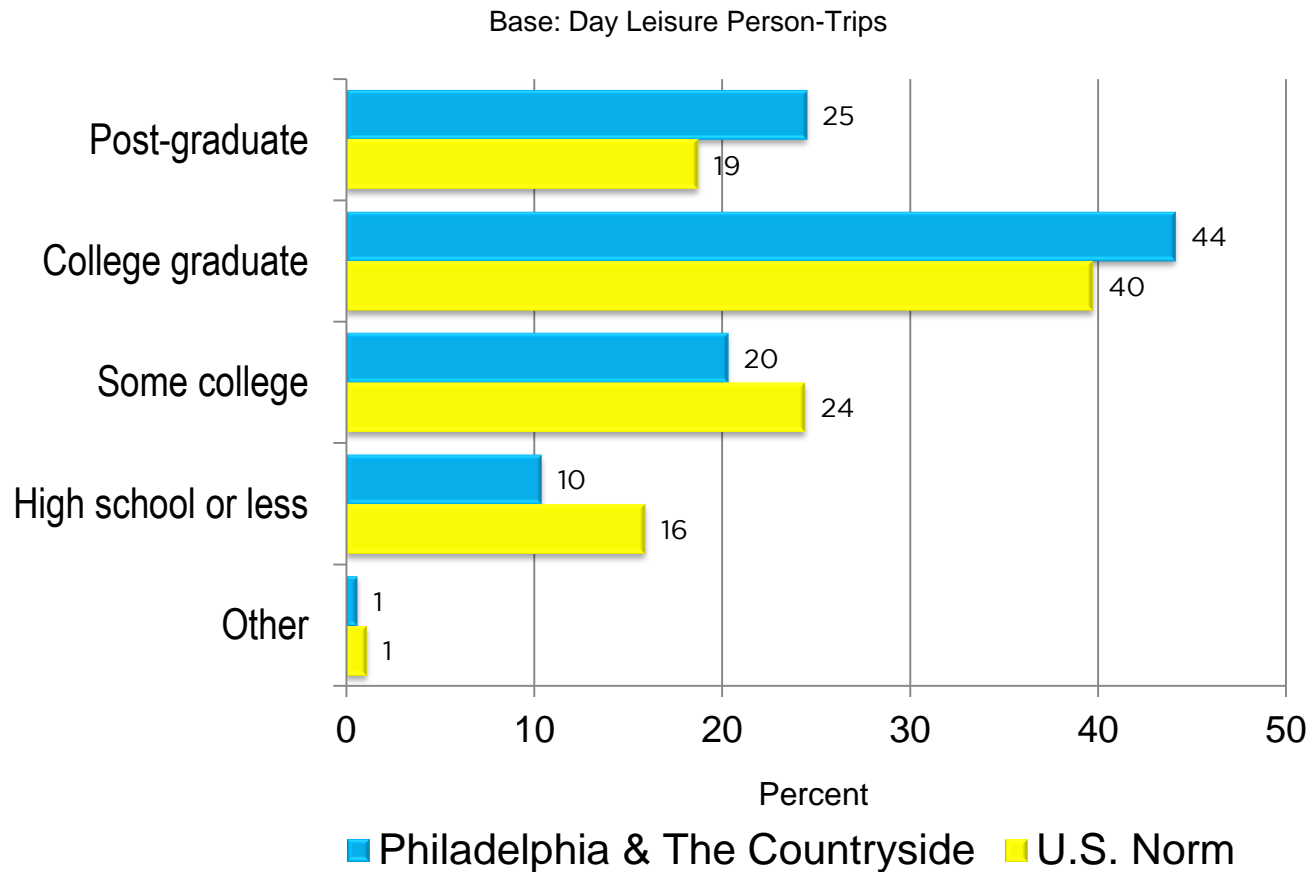
# Household Size



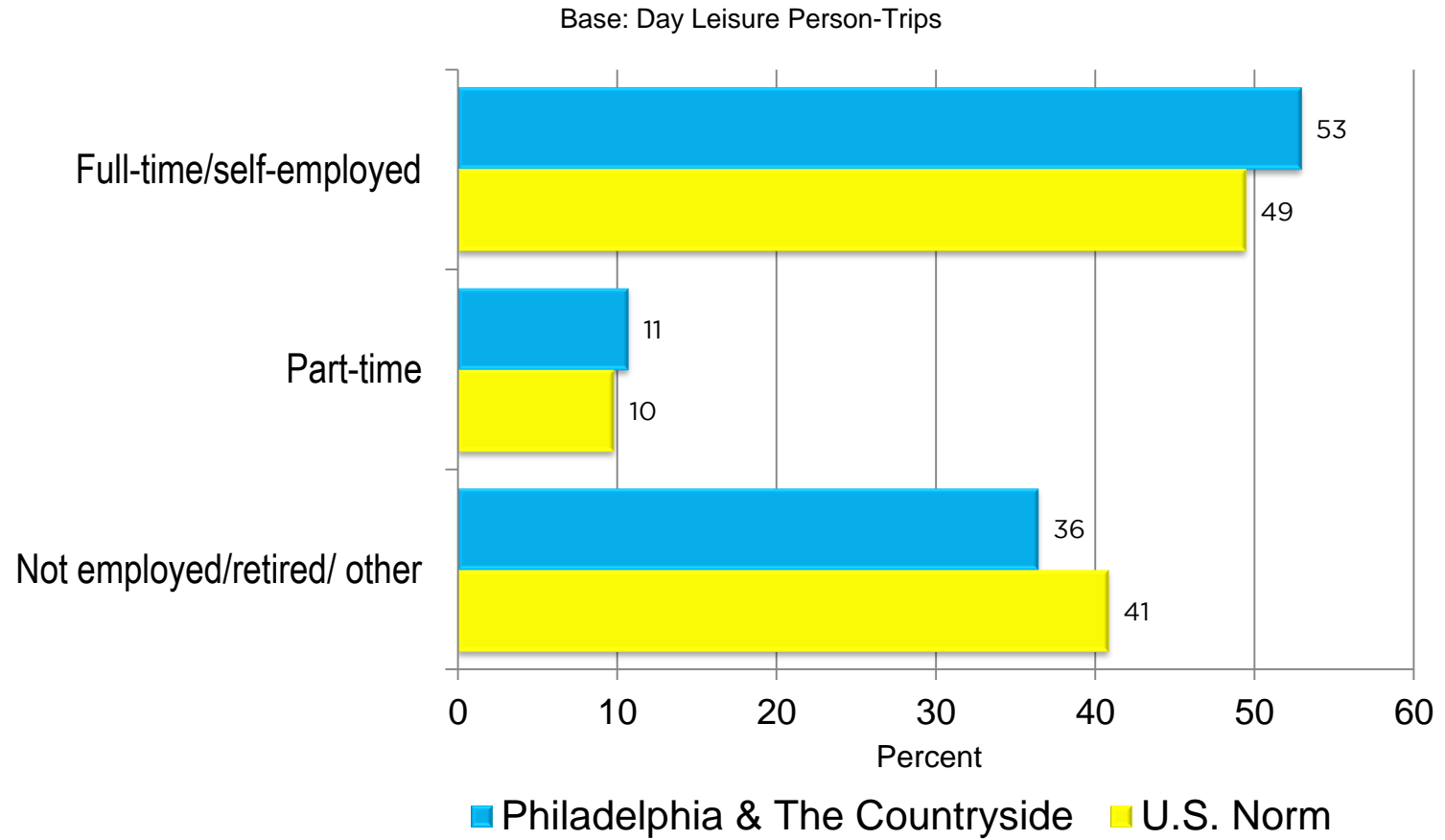
# Children in Household



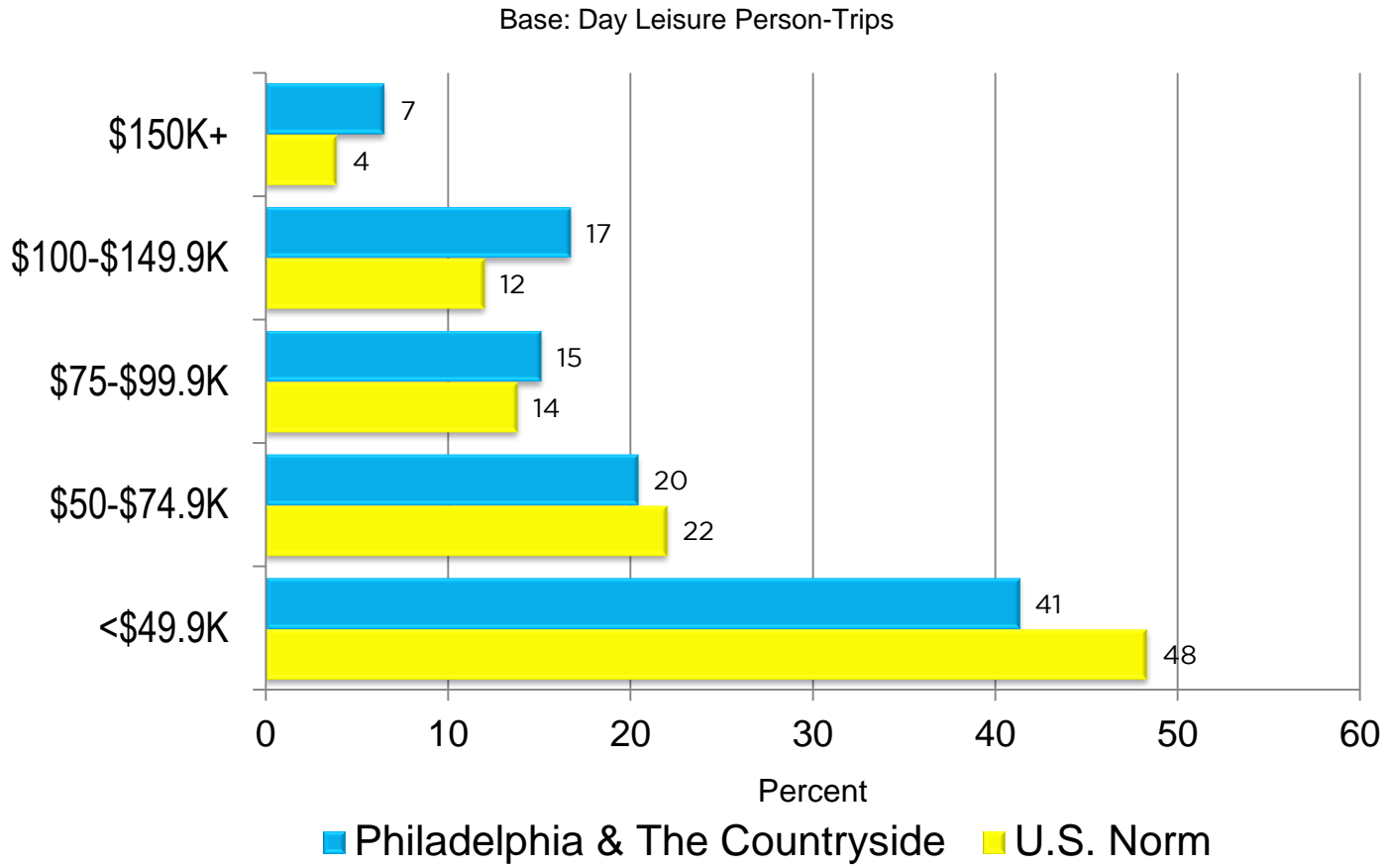
# Education



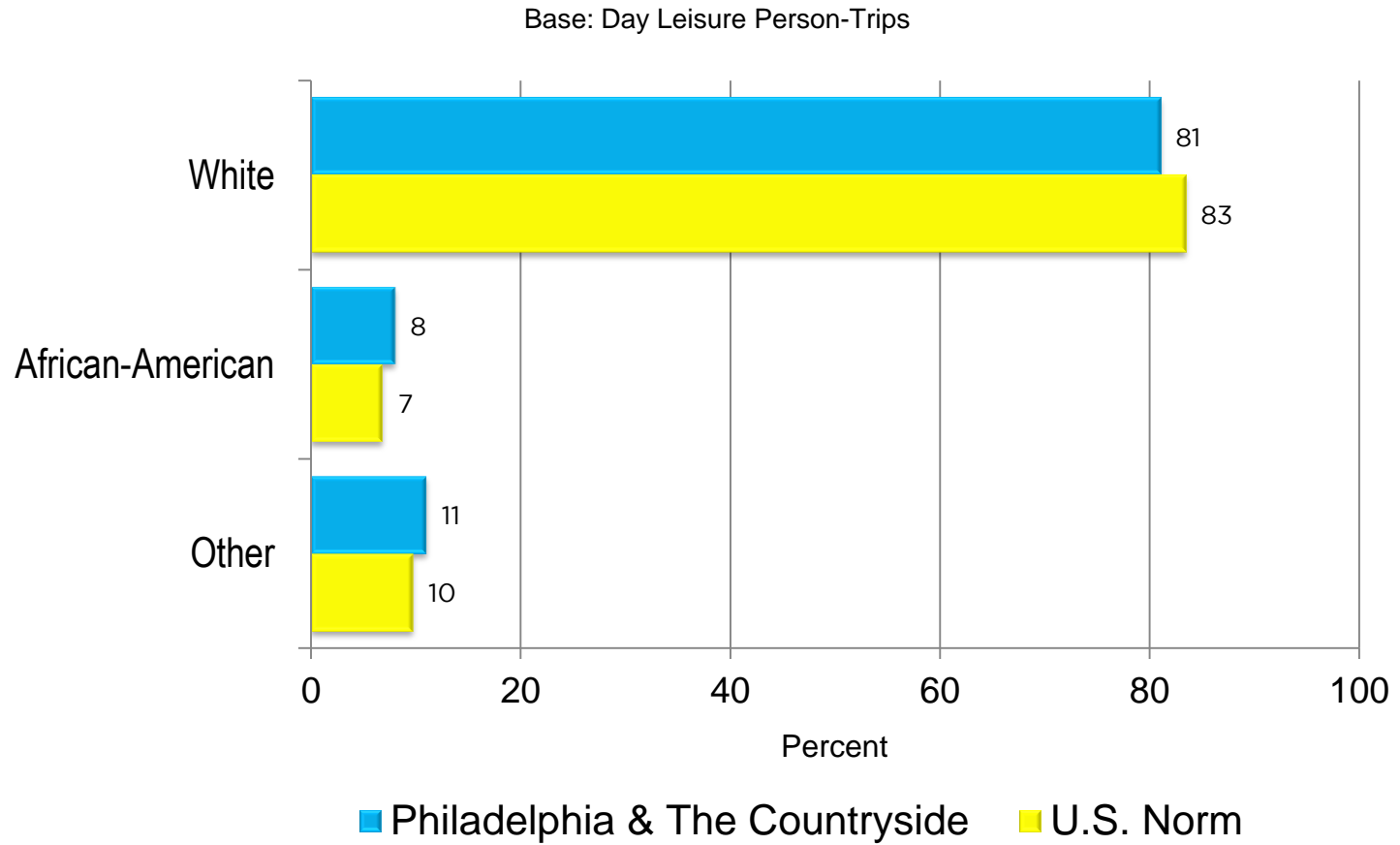
# Employment



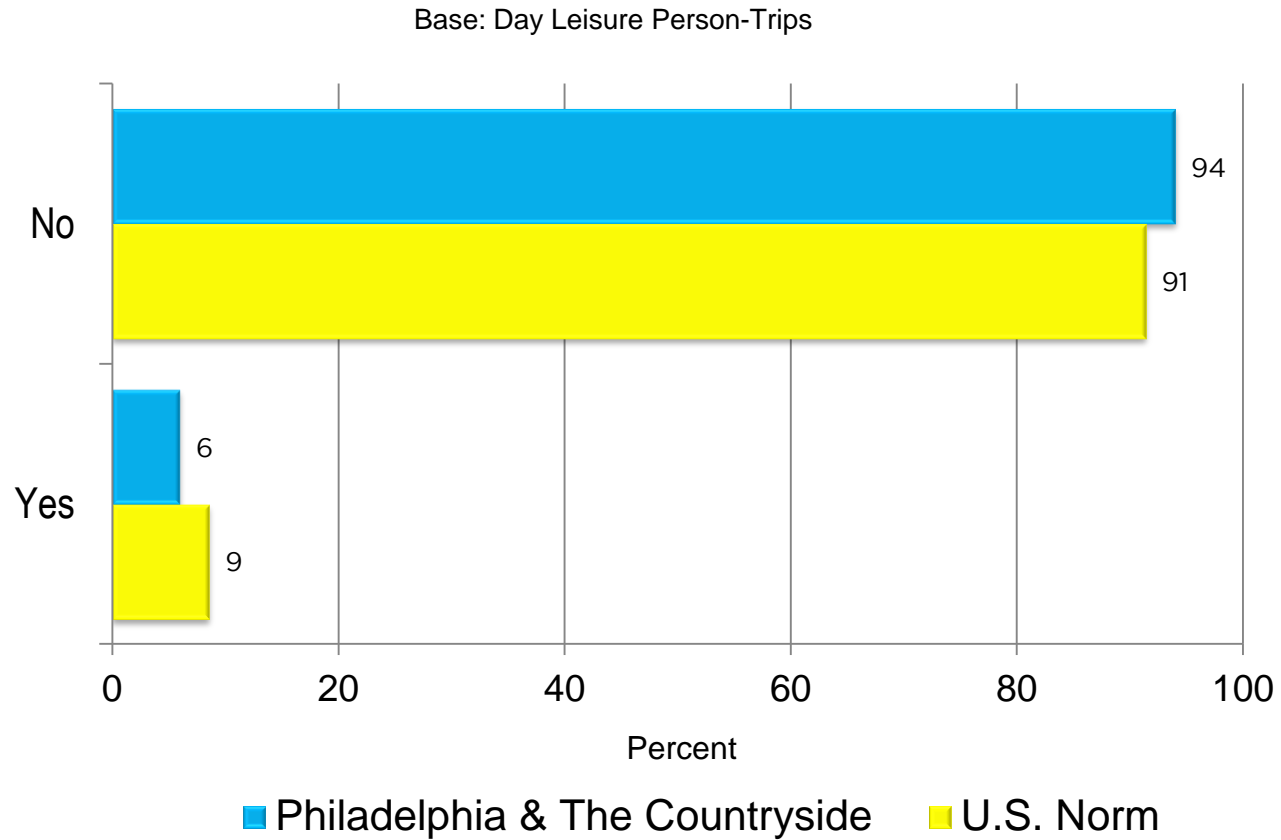
# Household Income



# Race



# Hispanic Background



## Appendix: Key Terms Defined





# Key Terms Defined

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- A **Person-Trip** is one trip taken by one visitor.
  - Person-trips are the key unit of measure for this report.

# Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

## Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
  - Visiting friends/relatives
  - Touring through a region to experience its scenic beauty, history and culture
  - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
  - Special event, such as a fair, festival, or sports event
  - City trip
  - Cruise
  - Casino
  - Theme park
  - Resort (ocean beach, inland or mountain resort)
  - Skiing/snowboarding
  - Golf
- **Business Trips:**
  - Conference/convention
  - Other business trip
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.