Russell Research COVID-19 Survey
Week 3 Results (as of March 30)
Research Objective:
- To evaluate the effects of COVID-19 on Philadelphia’s travel & tourism industry

Methodology:
- The study is conducted using the Russell Omnibus, a nationally representative survey of approximately 1,000 interviews among adults ages 18+. The study is conducted using online methodology with all interviews conducted on the Russell Research survey website.
- In addition to the general population, augments in the following three DMAs are included:
  - Philadelphia n=250
  - Washington, DC n=200
  - New York n=500
- For the purpose of analysis, only those respondents that have indicated taking at least one overnight leisure trip in the past 12 months which included a paid accommodation were analyzed in these results
Concern over the coronavirus and domestic travel still increased compared to last week, but not at the same rate as previous weeks, suggesting we could be approaching the peak of concern.

- 77% of travelers within our nearby DMAs are very concerned about leisure travel regarding the coronavirus.
- Travelers aged 55 and over continue to be the most concerned across multiple factors.

Reconsideration of leisure travel remains around 7+ months from now, with 41% of leisure travelers from nearby DMAs indicating they would wait this long before feeling comfortable traveling to Philly.

Leisure trip cancellations and postponements among the general population continue to increase, but not as much as we saw last week (+38% W1 → +15% W2).

- A higher proportion of travelers from NYC and DC DMAs have canceled or postponed their trips compared to the general population, especially among 18-34 year olds.
Leisure Travel Implications
Week 3 Results (as of March 30)
Over 8 in 10 travelers among still think the coronavirus situation is getting worse as of March 30th.

- This is highest among the Philly DMA (89%), though the percentage decreased over last week.

- Across the three DMAs, travelers aged 55+ continue to have the highest proportion, with 93% of travelers feeling the situation is getting worse.
Overall, how worried/concerned are you about the coronavirus?
Philly, NYC and DC DMA residents, as of March 30

- Worry and concern for COVID-19 remained relatively flat compared to last week across all 3 DMAs.
  - Travelers aged 35+ continue to be more concerned than those 18-34.
  - Within the general population, worry increased slightly, especially for travelers aged 18-34 (+18%).

- Concern within these DMAs is higher than concern among the general population (61%), especially for travelers 35 and over.
77% of travelers within our nearby DMAs are very concerned about leisure travel regarding the coronavirus, up slightly from 73% last week.

- This is higher than the general population, where 70% of travelers indicated high concern.

Worry and concern for travel increased significantly among travelers aged 18-34 (+18%).

While concern in NYC DMA stayed the same, Philly and DC DMAs saw increases over last week, with DC jumping 17%.

- All 3 DMAs have similar concern levels as of March 30th.
Of those that had planned to take a leisure vacation among the general population, 67% indicated they canceled or postponed their trip, up from 58% last week.

This increase came primarily from travelers aged 55+, with cancellations/postponements up 43% over last week.

A lower proportion of Philly DMA residents (60%) indicated they canceled or postponed their trip, while a higher proportion did from NYC (70%) and DC (72%) DMAs.

Within our nearby DMAs, cancellations/postponements still remain higher among 18-34 year olds, especially in the NYC DMA where 85% indicated cancelling or postponing upcoming travel.

Philly DMA residents saw the largest increase in cancellations/postponements compared to last week, especially among travelers 18-54.

### Table: Have you cancelled or postponed any leisure vacation plans due to the coronavirus that you would have taken in the next 4 weeks? As of March 30

<table>
<thead>
<tr>
<th></th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
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<tbody>
<tr>
<td><strong>Gen Pop</strong></td>
<td></td>
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<tr>
<td>Week 1: As of 3/16</td>
<td>49%</td>
<td>48%</td>
<td>27%</td>
</tr>
<tr>
<td>Week 2: As of 3/23</td>
<td>65%</td>
<td>60%</td>
<td>46%</td>
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<tr>
<td>Week 3: As of 3/30</td>
<td>68%</td>
<td>66%</td>
<td>66%</td>
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<tr>
<td><strong>Philly DMA</strong></td>
<td></td>
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<tr>
<td>Week 1: As of 3/16</td>
<td>50%</td>
<td>42%</td>
<td>48%</td>
</tr>
<tr>
<td>Week 2: As of 3/23</td>
<td>55%</td>
<td>50%</td>
<td>49%</td>
</tr>
<tr>
<td>Week 3: As of 3/30</td>
<td>71%</td>
<td>65%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>NYC DMA</strong></td>
<td></td>
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<tr>
<td>Week 1: As of 3/16</td>
<td>66%</td>
<td>64%</td>
<td>54%</td>
</tr>
<tr>
<td>Week 2: As of 3/23</td>
<td>73%</td>
<td>75%</td>
<td>63%</td>
</tr>
<tr>
<td>Week 3: As of 3/30</td>
<td>78%</td>
<td>72%</td>
<td>64%</td>
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<tr>
<td><strong>DC DMA</strong></td>
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<tr>
<td>Week 1: As of 3/16</td>
<td>57%</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>Week 2: As of 3/23</td>
<td>74%</td>
<td>61%</td>
<td>65%</td>
</tr>
<tr>
<td>Week 3: As of 3/30</td>
<td>85%</td>
<td>70%</td>
<td>60%</td>
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</table>
Due to the coronavirus, which of the following are you thinking of doing with regards to vacation plans?

As of March 30

- Postponing travel, avoiding air travel and avoiding crowded attractions continue to be implications for many travelers.

- Compared to last week, more travelers are thinking of avoiding trips to urban areas/cities, especially among the Philly and DC DMAs.
  - This increase was not present among the general population.

- More travelers among the general population and DC DMA are considering looking for deals, though it continue to be lower than other intentions.
Let’s say you had plans to vacation to a well populated city like Philadelphia in the next 4 weeks. What best describes the coronavirus’ impact on your plans to vacation in Philadelphia?

Philly, NYC and DC DMA residents, as of March 30

- About three-quarters of travelers from our nearby DMAs indicated they would be unlikely or very unlikely to still vacation to Philadelphia if they had plans, which is fairly consistent with last week.

- Philly DMA residents are becoming increasingly less likely to still vacation here in the next 4 weeks compared to other DMAs, a trend that we noticed in the first two weeks of surveying.
  - Travelers 55+ from the Philly DMA saw the largest increase in unlikeliness, up 17% over last week.

- 77% of general population travelers would be unlikely to still vacation to Philadelphia in the next 4 weeks.
  - Travelers 55+ continue to be the least likely among the general population, with 90% saying they would be unlikely.
Thinking about the state of the coronavirus outbreak today, when would you feel comfortable vacationing or traveling for leisure to Philadelphia?

Philly, NYC and DC DMA residents, as of March 30

- 41% of residents from nearby DMAs would feel comfortable waiting 7 months from now to travel to Philadelphia, fairly consistent with last week.
  - This proportion is still highest for travelers aged 55+, though they were the only age group to see a decrease over last week.
  - 53% of travelers in the general population want to wait 7 months or more, especially those 55+ (56%).

- Philly DMA travelers still feel comfortable traveling sooner than NYC or DC. 18% say they would within the next month compared to 10% in NYC and 9% in DC.
  - The Philly DMA also saw a 40% increase in the proportion saying they’d feel comfortable visiting in 2-3 months (21% vs 15% last week).
Which of the following would be the most motivating reason to plan a visit to Philadelphia in the near future? As of March 30

- Visiting friends/family is still more popular among the Philly DMA, though this saw a 31% decrease over last week.
  - This saw an increase among the general population

- Convenience and accessibility is becoming less of a motivator, especially among DC and NYC DMA residents.

- Good value saw an increase compared to last week, both among these 3 DMAs and the general population.
Business Travel Implications

Week 3 Results (as of March 30)
65% of those that planned on traveling for business in the next 4 weeks in the general population have canceled or postponed. This has been consistent for the past 3 weeks.

This proportion is higher for NYC (73%) and DC (70%) DMA residents, though all three DMAs saw decreases in cancellations from last week.

As of March 30
Due to the coronavirus, which of the following are you thinking of doing with regards to business travel plans?

As of March 30

- 40% of business travelers among the general population have indicated they are thinking of postponing travel.
  - This proportion is higher in the Philly DMA (56%), which saw a 40% increase over last week.

- Over a third of business travelers are still considering avoiding air travel, though this proportion is lower than last week.

- While a quarter of business travelers in the general population are thinking of avoiding city trips, this skews higher for nearby DMAs, especially Philly.
Thinking about the state of the coronavirus outbreak today, when would you feel comfortable vacationing or traveling for business to Philadelphia?

As of March 30

- 41% of business travelers within the general population would feel comfortable waiting 7 months from now to travel to Philadelphia for business, consistent with last week.
  - This proportion is lower among the NYC DMA (33%), where almost a third of business travelers said they would feel comfortable traveling within the next 3 months.

- Business travelers among the Philly DMA are no longer more likely to feel comfortable traveling to Philly for business sooner than other DMAs.