Russell Research COVID-19 Survey
Week 7 Results (as of April 27)
Research Objective:
- To evaluate the effects of COVID-19 on Philadelphia’s travel & tourism industry

Methodology:
- The study is conducted using an augmented sample of the Russell Omnibus, an online survey among adults ages 18+ in the following three DMAs:
  - 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.
KEY INSIGHTS

• While almost 7 in 10 travelers are still concerned about travel and COVID-19, they are becoming much more optimistic about the situation, especially those in the NYC DMA.

• Many travelers are still considering waiting 7+ months before feeling comfortable visiting Philadelphia, but the proportion is lower for 18-34 year olds and those from the Philly DMA.
  • 35% of travelers from the Philly DMA and 32% of travelers 18-34 would feel comfortable visiting Philadelphia in the next three months.

• All three DMAs saw an increase in travelers thinking of vacationing closer to home compared to the previous wave, with one in five now stating this as an impact of coronavirus on their travel plans.
  • More travelers from the NYC DMA are thinking of avoiding crowded attractions compared to the previous wave, while less travelers from the Philly and DC DMAs are thinking of postponing travel in general.
  • Travelers from all three DMAs are increasingly thinking of avoiding air travel.
Leisure Travel Implications
Week 7 Results (as of April 27)
Across the Philly, NY and DC DMAs, half of travelers think the coronavirus situation is getting worse as of April 27th, compared to 9 in 10 travelers three weeks ago.

- A higher proportion of DC travelers (58%) think the situation is getting worse, and a lower proportion among the NYC DMA (40%) think so. In NYC, an almost equal amount of travelers think the situation is getting better (36%).

Surprisingly, travelers aged 55+ have the lowest proportion that think the situation is getting worse, with 4 in 10 compared to 5 in 10 of travelers 18-54.

- This age group had the highest proportion three weeks ago, with 93% of travelers thinking the situation was getting worse.
Overall, how worried/concerned are you about the coronavirus?

Philly, NYC and DC DMA residents, as of April 27

- While concern regarding COVID-19 has decreased from three weeks ago, almost 7 in 10 travelers still expressed high concern as of April 27th, especially those from the NYC DMA.
  - Almost all travelers (96%) still indicate some level of concern.

- In NY and DC DMAs, travelers aged 18-34 show slightly lower levels of concern than travelers 35+, while in the Philly DMA, travelers 35-54 show the lowest concern.
  - Compared to April 6th, concern levels among travelers 35+ from all 3 DMAs decreased the most.
Similarly, 72% of respondents are still very concerned about leisure travel regarding the coronavirus, compared to 82% three weeks ago.

- Travelers from the NYC DMA are most concerned, while the DC DMA saw a large decrease in concern compared to the April 6 wave (-21pts).

- In the Philly DMA, travelers aged 35-54 show the lowest concern compared to 18-34 year olds in the DC DMA. In the NY DMA, all age groups show equal concern.
Of those that had planned to take a leisure vacation among these three DMAs, 67% indicated they canceled or postponed their trip, relatively consistent with the last two waves of the survey.

- A larger proportion of travelers in the NY DMA reported cancelling trips (70%) compared to Philly (64%) and DC (62%) DMAs.
- The DC DMA saw the largest decrease in cancellations (62% compared to 77% as of April 6th), especially among travelers 18-54.

Generally speaking, cancellations/postponements are still higher among 18-54 year olds than 55+ travelers.
Due to the coronavirus, which of the following are you thinking of doing with regards to vacation plans?

As of April 27

- Compared to three weeks ago, more people from the NYC DMA are thinking of avoiding crowded attractions, and less people from the Philly and DC DMA are thinking of postponing travel.
  - More travelers from all three DMAs indicated thinking of avoiding air travel compared to the previous wave.

- All three DMAs saw an increase in travelers thinking of vacationing closer to home.

- A quarter of travelers are considering a “staycation” in lieu of vacationing altogether, and another quarter are thinking of avoiding city trips, especially residents in the Philly and NY DMAs.
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 April 27

<table>
<thead>
<tr>
<th>Age Group</th>
<th>7+ months from now</th>
<th>Within the next 4-6 months</th>
<th>Within the next 2-3 months</th>
<th>Within the next month</th>
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</thead>
<tbody>
<tr>
<td>18-34</td>
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<tr>
<td>Week 1</td>
<td>23%</td>
<td>22%</td>
<td>14%</td>
<td>11%</td>
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<tr>
<td>Week 2</td>
<td>21%</td>
<td>23%</td>
<td>16%</td>
<td>14%</td>
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<tr>
<td>Week 3</td>
<td>14%</td>
<td>24%</td>
<td>22%</td>
<td>25%</td>
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<tr>
<td>Week 4</td>
<td>14%</td>
<td>26%</td>
<td>47%</td>
<td>33%</td>
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<td>Week 7</td>
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<td>47%</td>
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<td>35-54</td>
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<td>Week 1</td>
<td>23%</td>
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<td>Week 2</td>
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<td>Week 3</td>
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<td>Week 7</td>
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<td>48%</td>
<td>30%</td>
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<td>55+</td>
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<tr>
<td>Week 1</td>
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<td>21%</td>
<td>10%</td>
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<td>Week 2</td>
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<td>Week 3</td>
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<td>11%</td>
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<tr>
<td>Week 7</td>
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<td>10%</td>
<td>57%</td>
<td>11%</td>
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- Despite a decrease in concern, 46% of residents from nearby DMAs would feel comfortable waiting at least 7 months from now to travel to Philadelphia, only down slightly from 50% three weeks ago.
  - This proportion is lower for travelers aged 18-34, where a third would feel comfortable waiting 7+ months compared to almost half during the last survey wave.
  - Travelers aged 55+ continue to be the most cautious, with 53% wanting to wait 7 months. Only 16% in the age group would feel comfortable in the next 3 months, compared to 24% of travelers 35-54 and 32% of travelers 18-34.

- Consistent with the past 4 waves, Philly DMA travelers still feel comfortable traveling sooner than NYC or DC. 35% said they would feel comfortable traveling here within the next 3 months compared to 19% of the NY DMA and 18% of the DC DMA.
Which of the following would be the most motivating reason to plan a visit to Philadelphia in the near future?  
As of April 27

<table>
<thead>
<tr>
<th></th>
<th>Convenience / accessibility</th>
<th>Visiting friends / relatives</th>
<th>New experience</th>
<th>Variety of events / activities</th>
<th>Good value</th>
<th>Low price</th>
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<tbody>
<tr>
<td><strong>Philadelphia DMA</strong></td>
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<td><strong>New York DMA</strong></td>
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<tr>
<td><strong>DC DMA</strong></td>
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<td><img src="chart18.png" alt="Chart" /></td>
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</tbody>
</table>

- Convenience and accessibility is by far the most motivating factor to visit Philadelphia for travelers from the Philly DMA.
  - A new experience is most motivating for the NYC and DC DMAs.
  - Visiting friends/relatives is also motivating to the Philly and DC DMAs.

- Across all three DMAs, a variety of events/activities saw a decrease compared to three weeks ago, especially in Philly and DC.
  - Low price continues to be a low motivator for all DMAs.

- In general, travelers 18-34 are more motivated by a new experience or visiting family/friends than other age groups.
Business Travel Implications
Week 7 Results (as of April 27)

April 29, 2020
71% of those in our nearby DMAs with plans to travel for business in the next 4 weeks have canceled/postpone due to the coronavirus. This is a decrease from three weeks ago, where 77% of those with business travel plans had canceled/postponed.

This decrease primarily came from the DC DMA (62% compared to 81% three weeks ago), which now has the lowest proportion of business cancellations/postponements.

- Philly is the only DMA that saw an increase in cancellations from the most recent wave.
Due to the coronavirus, which of the following are you thinking of doing with regards to business travel plans?

As of April 27

- A lower proportion of business travelers from the NYC and DC DMAs are thinking of postponing travel compared to 3 weeks ago.
  - Philadelphia saw an increase in those planning to postpone.

- Over a third of business travelers are still considering avoiding air travel, with the highest proportion among NYC (41%).

- Almost a quarter of business travelers in the Philly and DC DMAs are thinking of avoiding city trips, while over one-third in the NYC DMA are thinking this.
Thinking about the state of the coronavirus outbreak today, when would you feel comfortable vacationing or traveling for business to Philadelphia?

As of April 27

- 36% of business travelers from our nearby DMAs would feel comfortable waiting 7 months from now to travel to Philadelphia for business, consistent with three weeks ago.
  - Despite an increase over the previous wave, this proportion is still lower among the Philly DMA (27%). The proportion is higher among the DC DMA (44%).

- More than a quarter of business travelers among the Philly DMA would feel comfortable traveling to Philly for business within the next month, compared to 18% in the NY DMA and 14% in the DC DMA.