



Russell Research COVID-19 Survey

Week 1 Results (as of March 16)

March 24, 2020

OBJECTIVES & METHODOLOGY

- **Research Objective:**

- To evaluate the effects of COVID-19 on Philadelphia's travel & tourism industry

- **Methodology:**

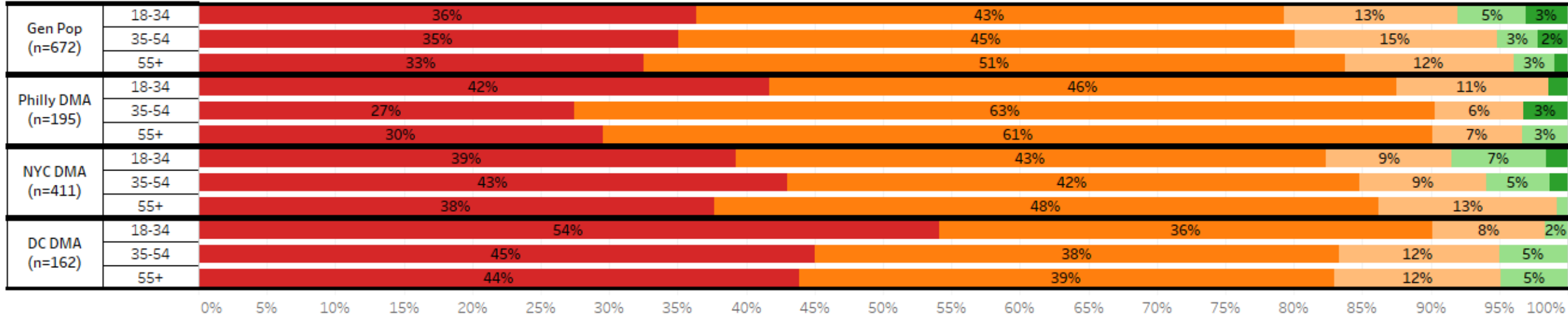
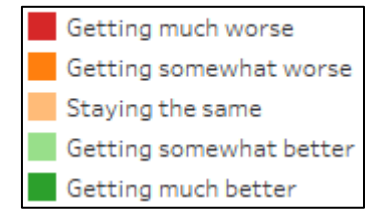
- The study is conducted using the Russell Omnibus, a nationally representative survey of approximately 1,000 interviews among adults ages 18+. The study is conducted using online methodology with all interviews conducted on the Russell Research survey website.
- In addition to the general population, 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

KEY INSIGHTS

- The coronavirus has sparked concerns over leisure travel with a third of the general population having already canceled/postponed their upcoming leisure travel plans. Concern is highest among New York DMA residents.
- Most leisure travelers within the general population are expecting to wait at least 6 months before reconsidering leisure travel.
 - Residents from nearby DMAs would feel comfortable traveling to Philadelphia sooner than the general population, with a higher proportion reconsidering within the next 4-6 months.

Do you think the situation of the coronavirus outbreak is getting better or worse?

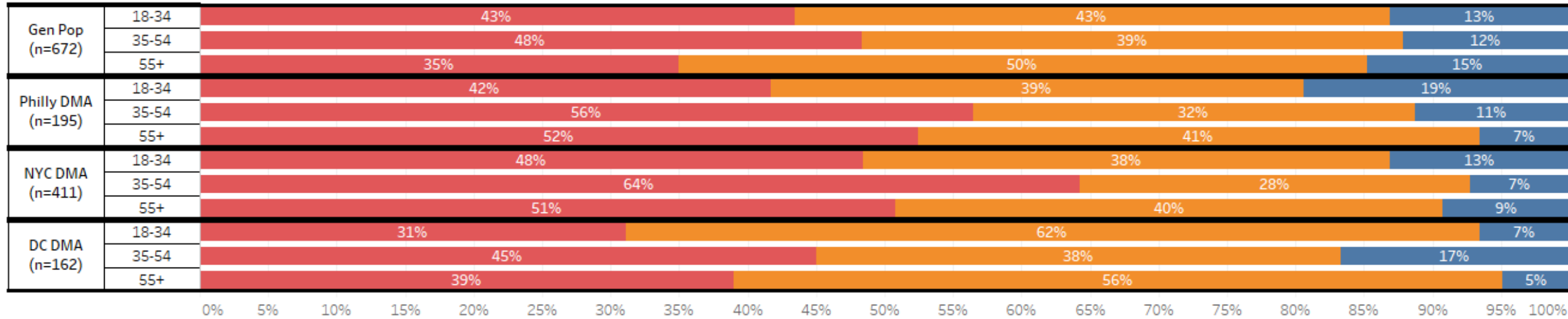
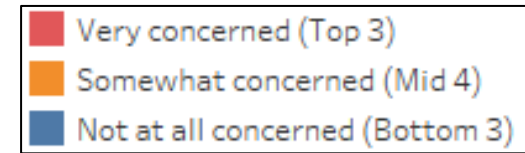
As of March 16



- Overall, more than 8 in 10 people think that the coronavirus situation is getting worse as of March 16.
 - In our nearby markets (Philly, NYC and DC DMAs), this proportion is even higher, with almost 9 in 10 people thinking the situation is getting worse.
- In the Philly and DC DMAs, a greater proportion of respondents 18-34 felt like the situation was getting “much worse”. In the NYC DMA, this age group was slightly more optimistic.

Overall, how worried/concerned are you about the coronavirus?

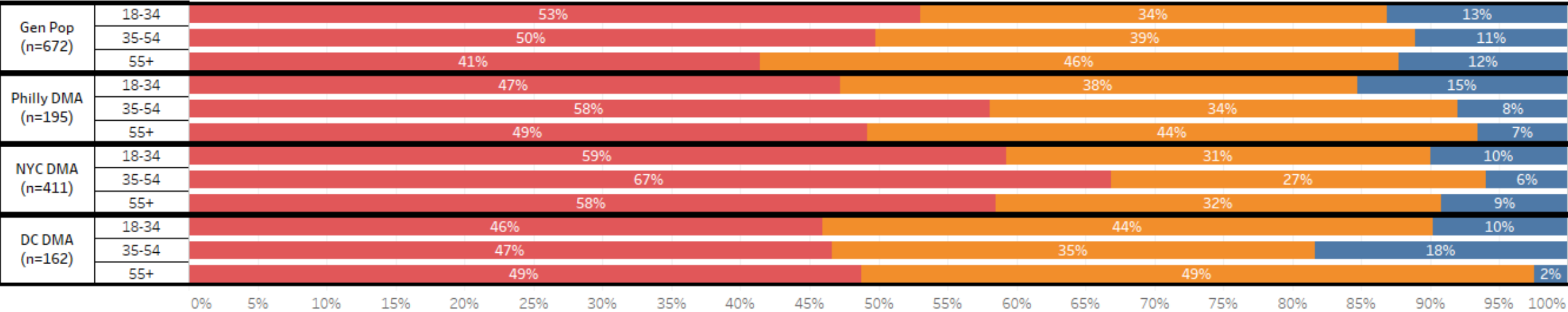
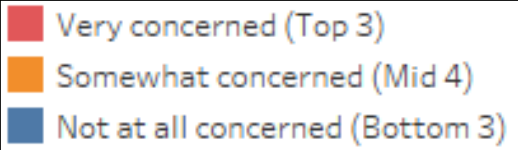
As of March 16



- Roughly two in five of the general population were personally worried/concerned about COVID-19 as of March 16.
 - People 55 and over were less concerned than people aged 18-54.
- Among nearby DMAs, NYC DMA residents are most concerned about the virus, especially those aged 35-54. This age group is the most concerned across all DMAs.

When it comes to traveling for leisure within the United States, how worried/concerned are you about the coronavirus?

As of March 16



- Over half of respondents between the ages of 18 and 54 indicated they were very concerned about the coronavirus when it comes to traveling for leisure within the U.S.
 - A larger proportion of respondents over 55 indicated they were “somewhat” concerned.
- In the Philly and NYC DMA, those aged 35-54 were most concerned about domestic leisure travel. In the DC DMA, this age group had the highest proportion of people not concerned.
 - Across all age groups, the NYC DMA had the highest proportion of “very concerned” residents.

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 16

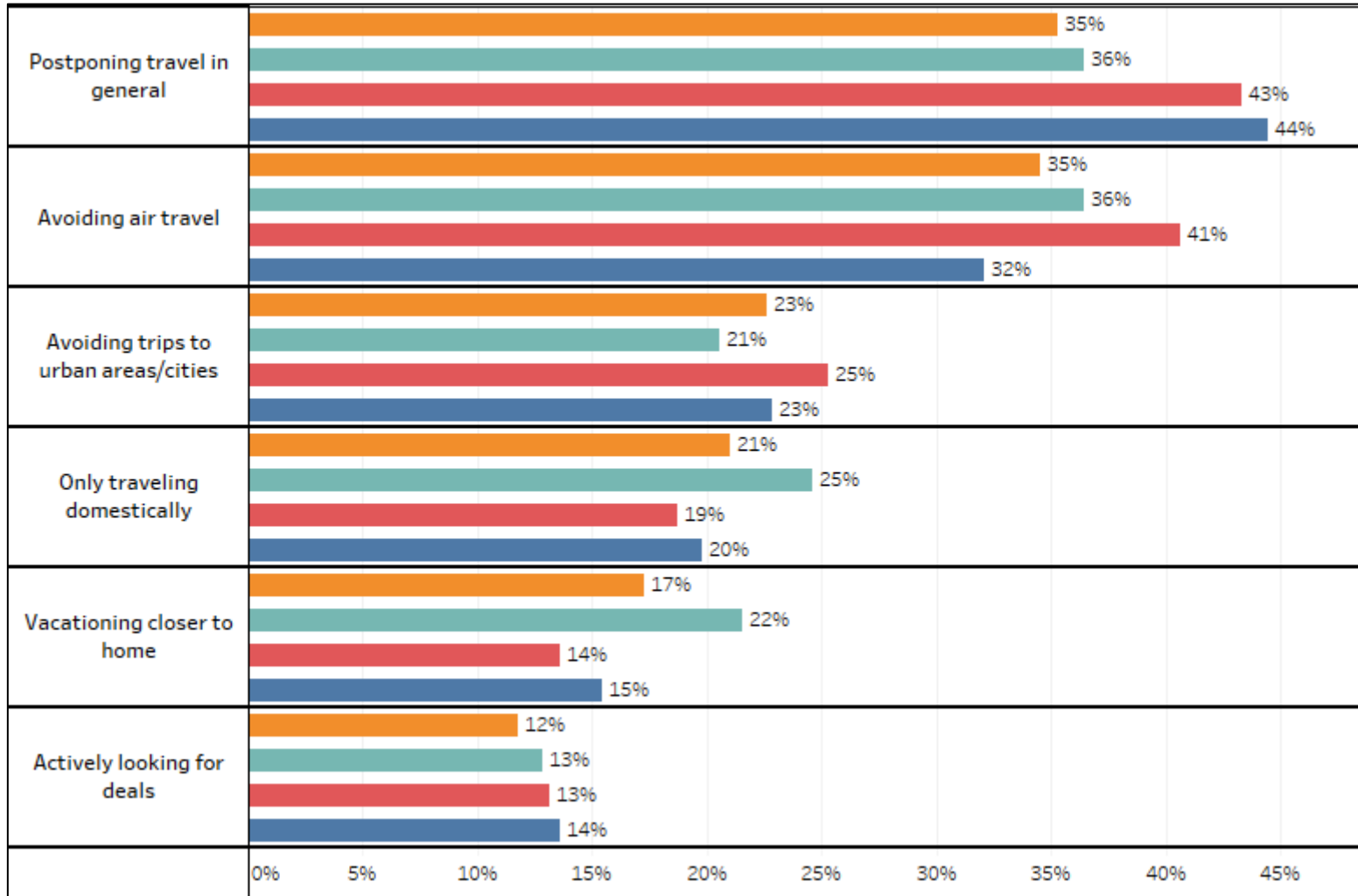
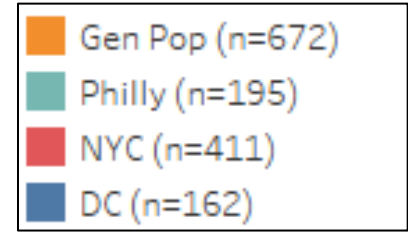
	Yes	No
Gen Pop	41%	59%
Philly DMA	47%	53%
NYC DMA	62%	38%
DC DMA	48%	52%

		Yes	No
Gen Pop	18-34	51%	49%
	35-54	46%	54%
	55+	27%	73%
Philly DMA	18-34	50%	50%
	35-54	42%	58%
	55+	48%	52%
NYC DMA	18-34	66%	34%
	35-54	64%	36%
	55+	54%	46%
DC DMA	18-34	57%	43%
	35-54	44%	56%
	55+	42%	58%

- Of all respondents that had a trip planned in the next four weeks, almost half indicated that they've cancelled or postponed those trips.
 - While 41% of general population respondents canceled or postponed trips, respondents in the NYC (62%), DC (48%) and Philadelphia (47%) DMAs eclipsed that mark.
- Among the general population, a higher proportion of people 55 and over have not cancelled or postponed plans as of March 16.

Due to the coronavirus, which of the following are you thinking of doing with regards to vacation plans?

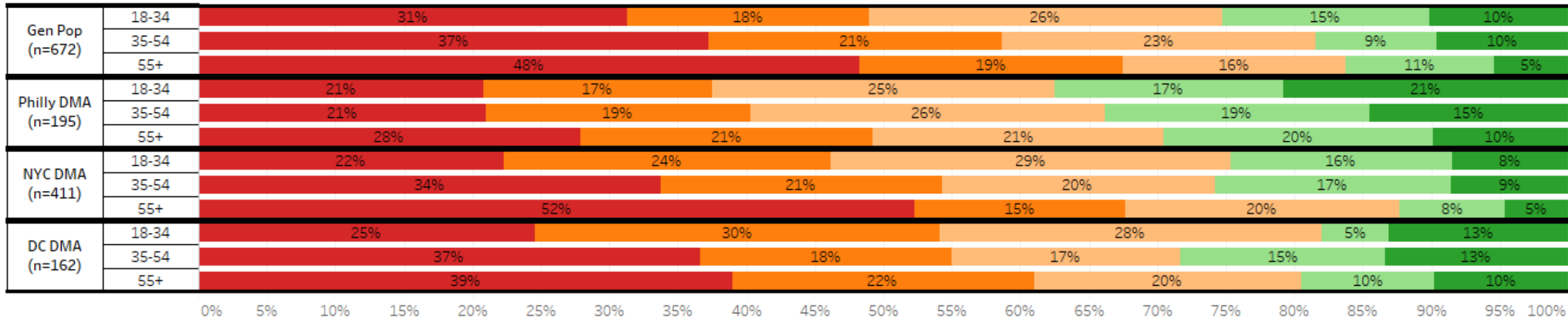
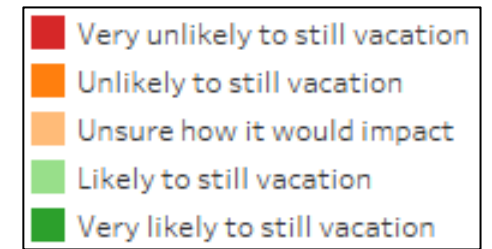
As of March 16



- When asked their plans with regards to vacations, over three in ten said they would postpone travel and avoid air travel.
 - A higher proportion of New York DMA residents would avoid air travel.
- Roughly a quarter said they would avoid trips to cities, and two in ten said they would only travel domestically.
- A higher proportion of Philly DMA residents indicated they would vacation closer to home.

Which of the following best describes the coronavirus' impact on your plans to vacation to Philadelphia in the next 4 weeks?

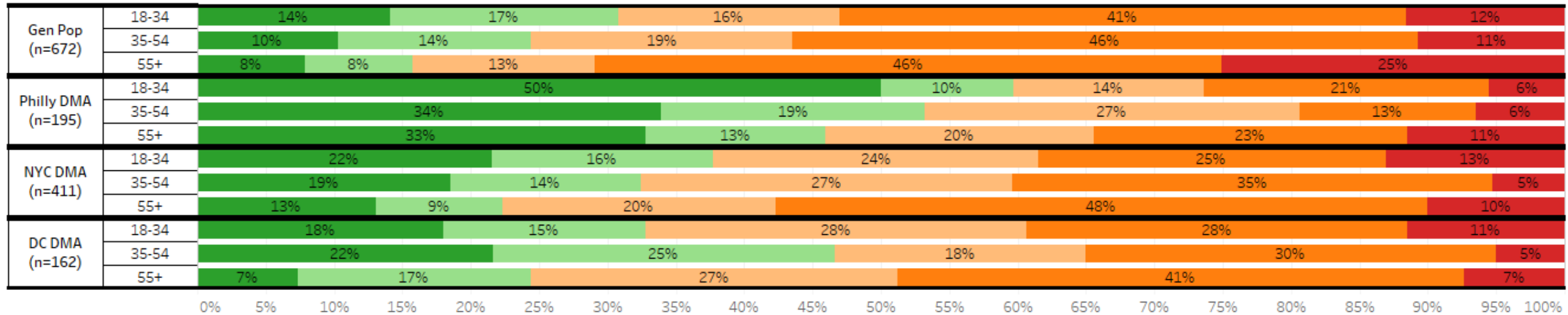
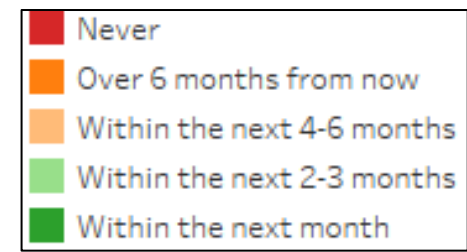
As of March 16



- The majority of the general population is unlikely to still travel for leisure to Philadelphia in the next 4 weeks. This proportion is higher for respondents aged 55 and up.
- Philly DMA residents are the most likely to still consider travel to Philadelphia for leisure, especially among the 18-34 age group.
 - This indicates that our local DMA will likely bounce back quicker than further markets.

Thinking about the state of the coronavirus outbreak today, when would you feel comfortable vacationing or traveling for leisure to Philadelphia?

As of March 16



- Among the general population, two in five would feel comfortable waiting at least 6 months to travel to Philadelphia again.
 - Respondents over 55 indicated they would wait longer or never travel to Philadelphia.
- Residents from nearby DMAs would feel comfortable traveling to Philadelphia sooner than the general population, with a higher proportion reconsidering within the next 4-6 months.
 - A greater proportion of Philly DMA residents are willing to travel within the next month, especially those aged 18 to 34.

Which of the following would be the most motivating reason to plan a visit to Philadelphia in the near future?

As of March 16

		New experience	Visiting friends / relatives	Variety of events / activities	Low price	Good value	Convenience / accessibility
Gen Pop (n=672)	18-34	29%	20%	10%	13%	13%	4%
	35-54	23%	15%	12%	14%	9%	3%
	55+	18%	13%	11%	10%	8%	1%
Philly DMA (n=195)	18-34	7%	26%	15%	7%	14%	21%
	35-54	10%	23%	18%	10%	13%	19%
	55+	2%	20%	25%	5%	7%	28%
NYC DMA (n=411)	18-34	31%	20%	10%	8%	15%	9%
	35-54	16%	18%	16%	11%	13%	11%
	55+	8%	18%	21%	5%	5%	9%
DC DMA (n=162)	18-34	25%	16%	18%	11%	8%	10%
	35-54	23%	15%	17%	5%	12%	13%
	55+	10%	22%	15%	7%	5%	15%

- A new experience is the most motivating reason to visit Philadelphia in the near future, especially among people aged 18-34. This proportion is lower for residents within the Philly DMA.
 - Visiting friends/family and convenience/accessibility is more popular among the Philly DMA.
- Variety of events/activities is more popular among Philly and DC DMA residents aged 55 and over.

Have you cancelled or postponed business travel due to the coronavirus that you would have taken in the next 4 weeks?

As of March 16

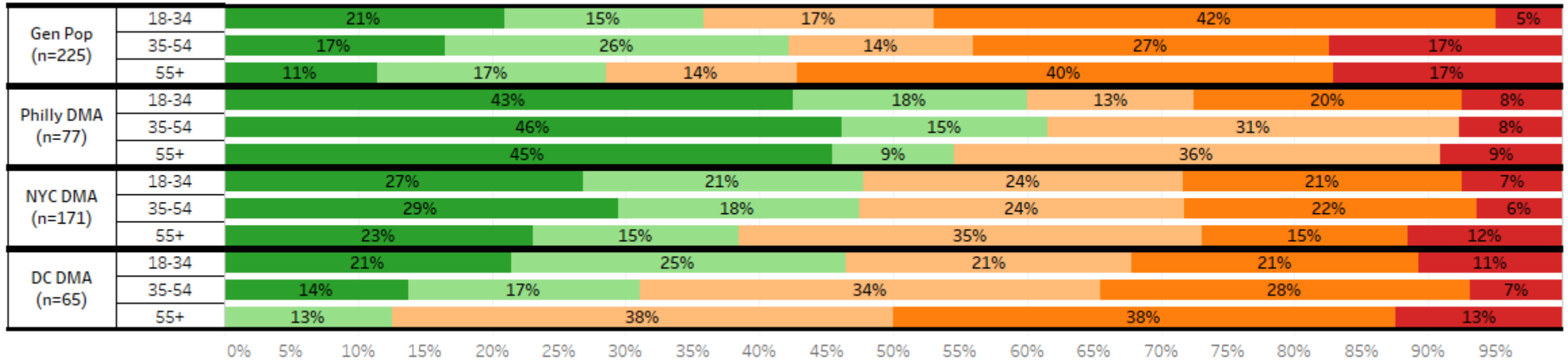
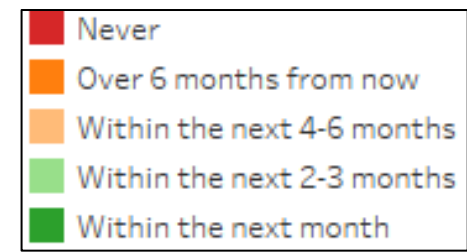
	Yes	No
Gen Pop (n=225)	52%	32%
Philly DMA (n=77)	45%	36%
NYC DMA (n=171)	60%	23%
DC DMA (n=65)	58%	18%

		Yes	No
Gen Pop (n=225)	18-34	68%	23%
	35-54	45%	34%
	55+	37%	43%
Philly DMA (n=77)	18-34	38%	43%
	35-54	62%	23%
	55+	36%	45%
NYC DMA (n=171)	18-34	49%	33%
	35-54	73%	13%
	55+	46%	27%
DC DMA (n=65)	18-34	46%	21%
	35-54	69%	14%
	55+	63%	25%

- Over half of business travelers indicated that they have cancelled or postponed a business trip that they would have taken in the next 4 weeks.
 - The proportion is higher for residents from NYC and DC DMAs, especially for those aged 35-54.
- Among the general population, a higher proportion of people 18-34 have cancelled or postponed plans as of March 16.

Thinking about the state of the coronavirus outbreak today, when would you feel comfortable vacationing or traveling for business to Philadelphia?

As of March 16



- About one-third of business travelers within the general population would feel comfortable waiting at least 6 months to travel to Philadelphia again.
 - A larger proportion of respondents between the ages of 35-54 said they would feel comfortable within the next 2-3 months.
- Business travelers from nearby DMAs would feel comfortable traveling to Philadelphia sooner than the general population, with a higher proportion reconsidering within the next 4-6 months.
 - Philly DMA residents are much more willing to travel for business within the next month.