

---

# Russell Research COVID-19 Survey

## Week 4 Results (as of April 6)

April 9, 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

- **While concern about the coronavirus regarding travel seems to be leveling off among the Philly DMA, it continues to increase among the NYC and DC DMAs as well as the general population.**
  - Travelers aged 55 and over continue to be the most concerned across multiple factors.
- **Travelers are still considering waiting around 7+ months from now before feeling comfortable visiting Philly, though the proportion increased compared to last week.**
- **Travel behaviors and motivators are remaining consistent week over week, indicating we may not see a shift in behavior until the situation starts to get better.**
  - Many travelers are still postponing or cancelling their travel plans and avoiding air travel, crowded places and trips to urban areas/cities.
  - DC and NYC DMA residents continue to be motivated to travel by new experiences, while convenience/accessibility continues to be important for the Philly DMA.

---

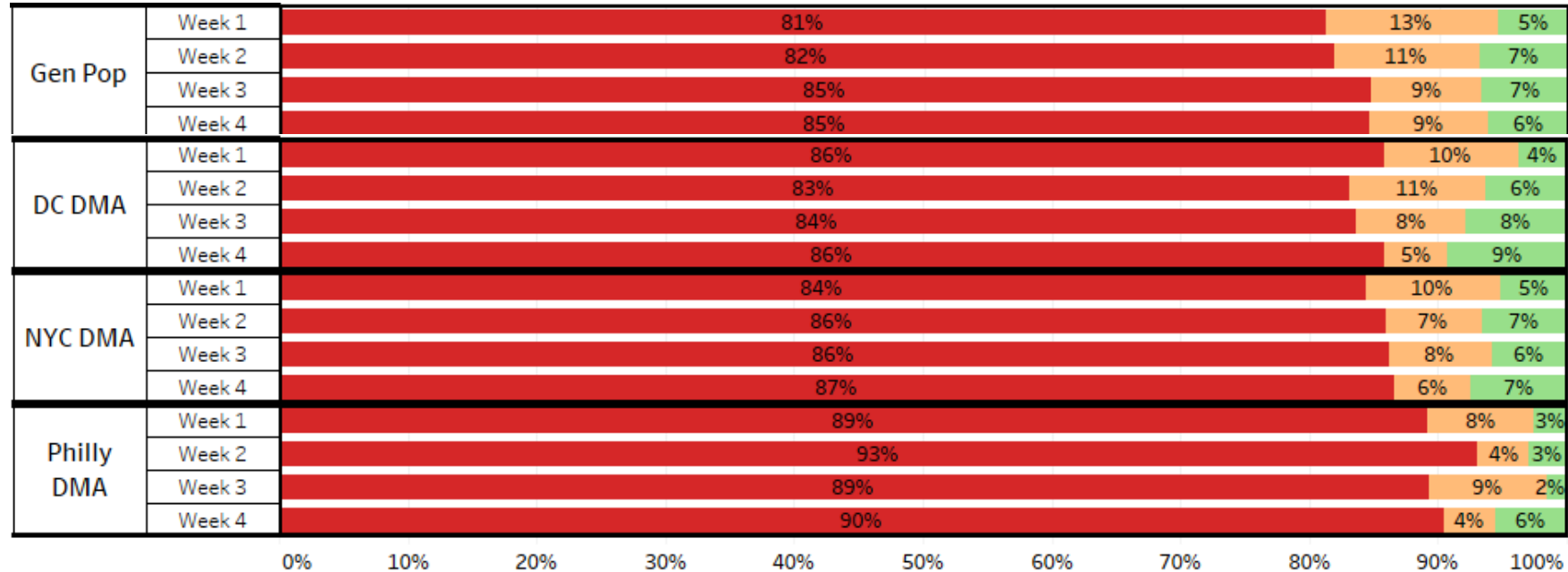
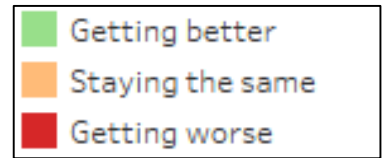
# Leisure Travel Implications

## Week 4 Results (as of April 6)

April 9, 2020

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

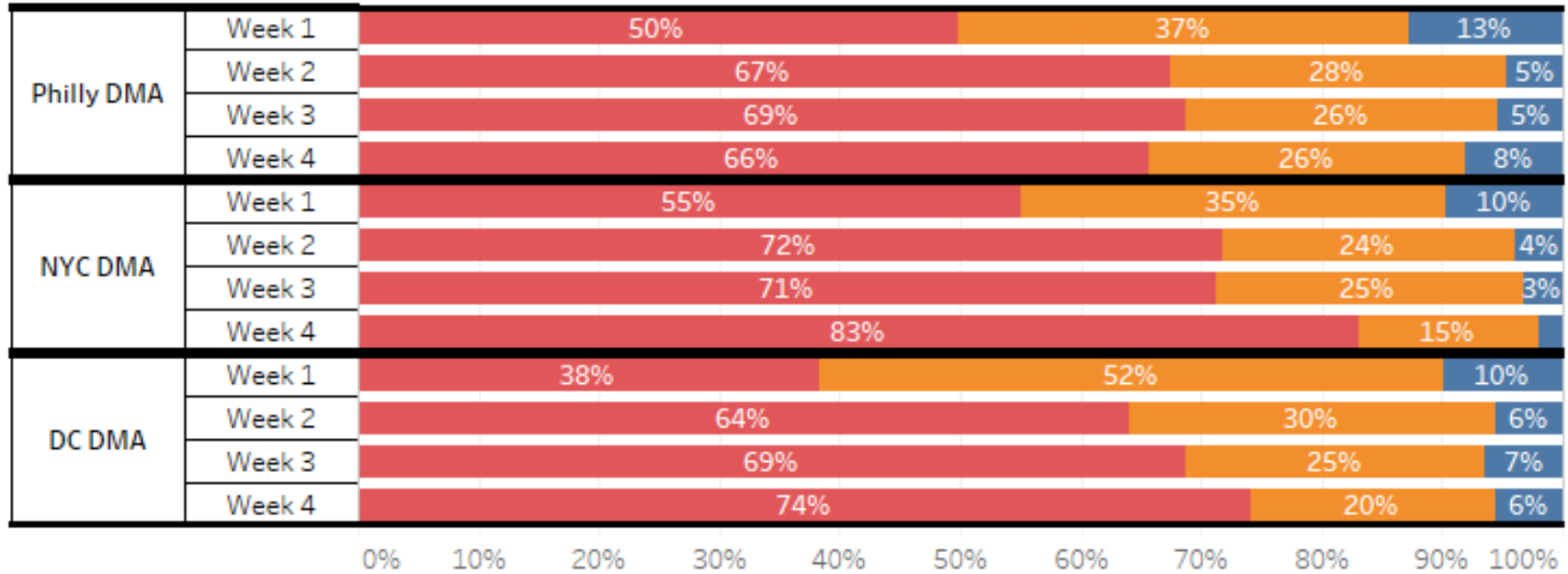
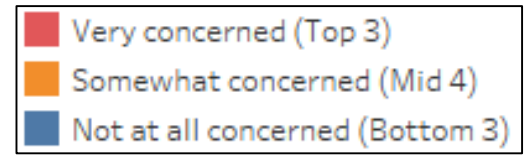
As of April 6



- Almost 9 in 10 travelers among still think the coronavirus situation is getting worse as of April 6<sup>th</sup>, consistent with last week.
  - This is highest among the Philly DMA (90%), with a 13% increase over last week among 18-34 year olds.
- Across the three DMAs, travelers aged 55+ continue to have the highest proportion, with 93% of travelers feeling the situation is getting worse. This is unchanged from last week.

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

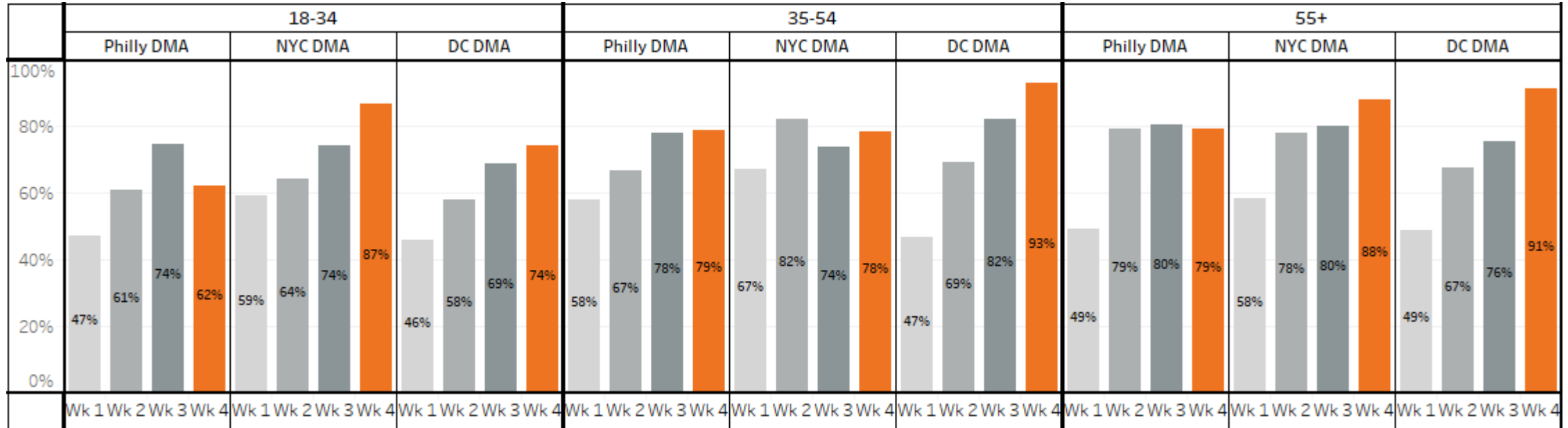
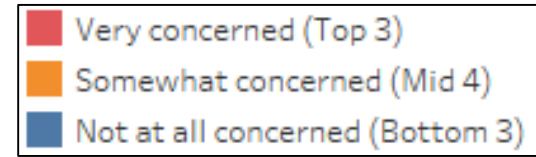
Philly, NYC and DC DMA residents, as of April 6



- Worry and concern for COVID-19 increased among NYC and DC DMA residents. Concern within these two DMAs is higher than concern among the general population (65%).
  - NYC DMA residents show the highest concern (83%), and the largest increase over last week (+17%).
  - In NYC, increases were seen across all age groups, while in DC increases were more prominent among travelers 35+.
- Among the general population, travelers aged 55+ show the least concern (59%), while these travelers show the highest concern among our nearby DMAs (80%).

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

Philly, NYC and DC DMA residents, as of April 6



- 82% of travelers within our nearby DMAs are very concerned about leisure travel regarding the coronavirus, up slightly from 77% last week.
  - This is higher than the general population, where 75% of travelers indicated high concern.
  - Concern is lower among the Philly DMA (75%) than NYC (84%) and DC (86%), with the greatest difference among 18-34 year olds.
- Among the general population, travelers aged 55+ show the least concern (72%), while these travelers show the highest concern among our nearby DMAs (86%).

# 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 April 6

		18-34	35-54	55+
Gen Pop	Week 1	49%	48%	27%
	Week 2	65%	60%	46%
	Week 3	68%	66%	66%
	Week 4	78%	71%	70%

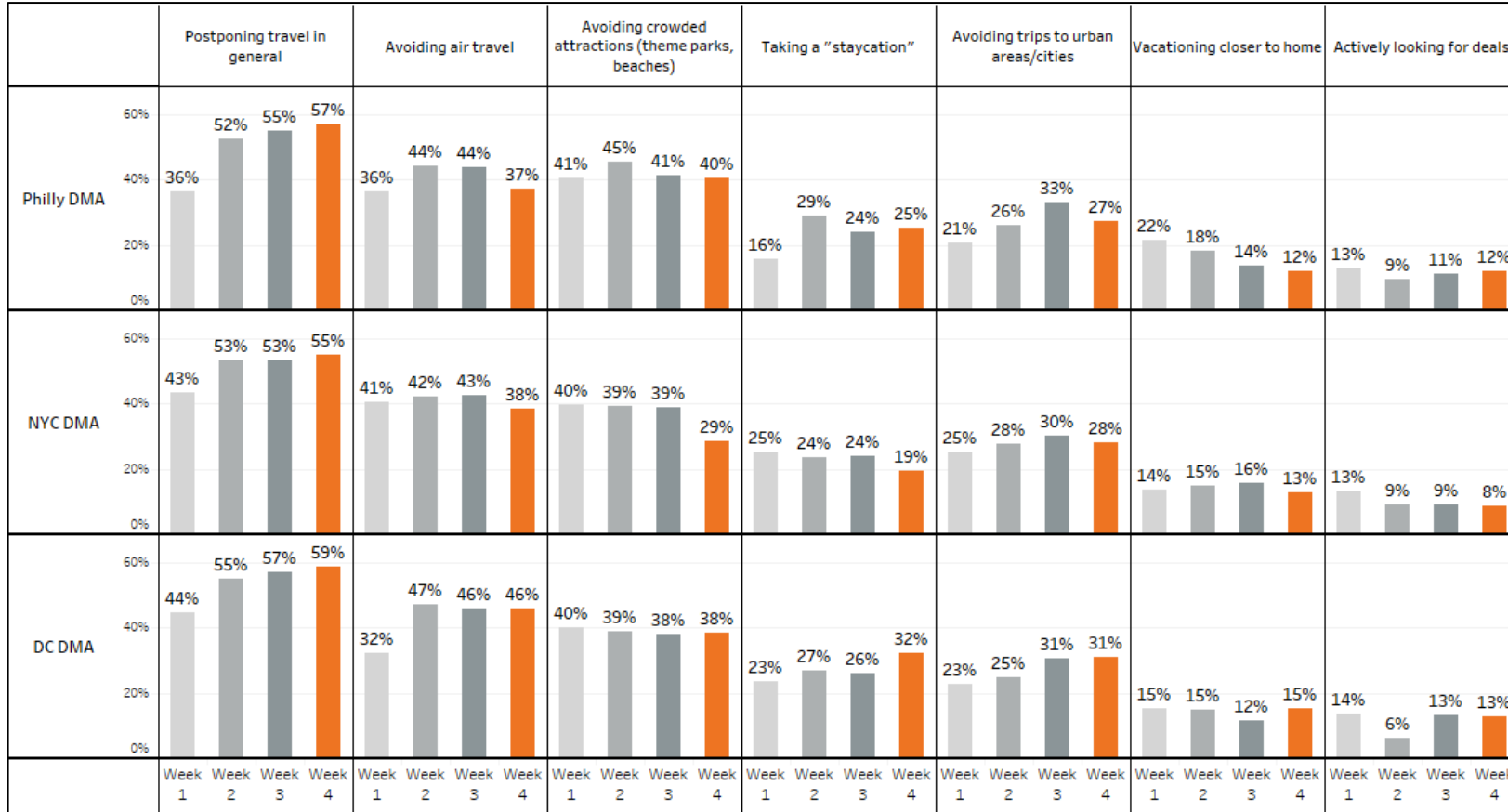
		18-34	35-54	55+
Philly DMA	Week 1	50%	42%	48%
	Week 2	55%	50%	49%
	Week 3	71%	65%	49%
	Week 4	71%	38%	65%
NYC DMA	Week 1	66%	64%	54%
	Week 2	73%	75%	63%
	Week 3	78%	72%	64%
	Week 4	76%	82%	67%
DC DMA	Week 1	57%	44%	42%
	Week 2	74%	61%	65%
	Week 3	85%	70%	60%
	Week 4	88%	82%	63%

- Of those that had planned to take a leisure vacation among the general population, 73% indicated they canceled or postponed their trip, up from 67% last week.
  - A lower proportion of Philly DMA residents (59%) indicated they canceled or postponed their trip, while a higher proportion did from NYC (76%) and DC (77%) DMAs.
- NYC and DC DMAs saw an increase in cancellations/postponements over last week, while the Philly DMA saw a slight decrease driven by travelers aged 35-54.
- Generally speaking, cancellations/postponements are higher among 18-54 year olds than 55+.



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

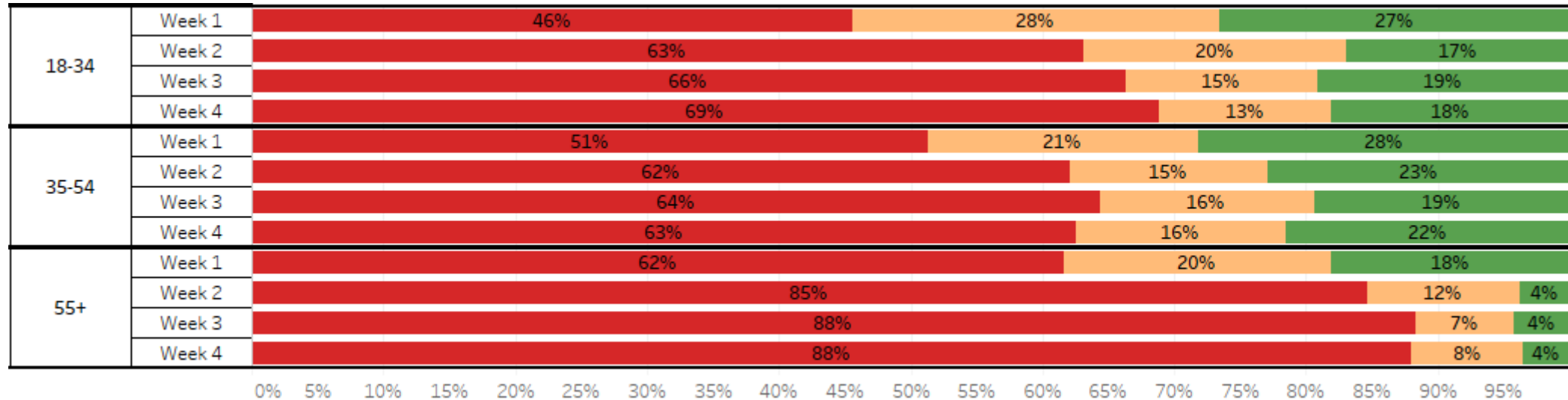
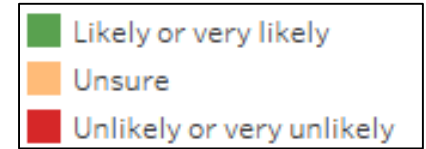
As of April 6



- Postponing travel, avoiding air travel and avoiding crowded attractions continue to be implications for many travelers.
  - Postponing travel continues to increase each week for all DMAs.
  - The NYC DMA saw a 26% decrease in travelers avoiding crowded attractions.
- Vacationing closer to home and actively looking for deals continue to be lower on the list of coronavirus impacts.

# 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?

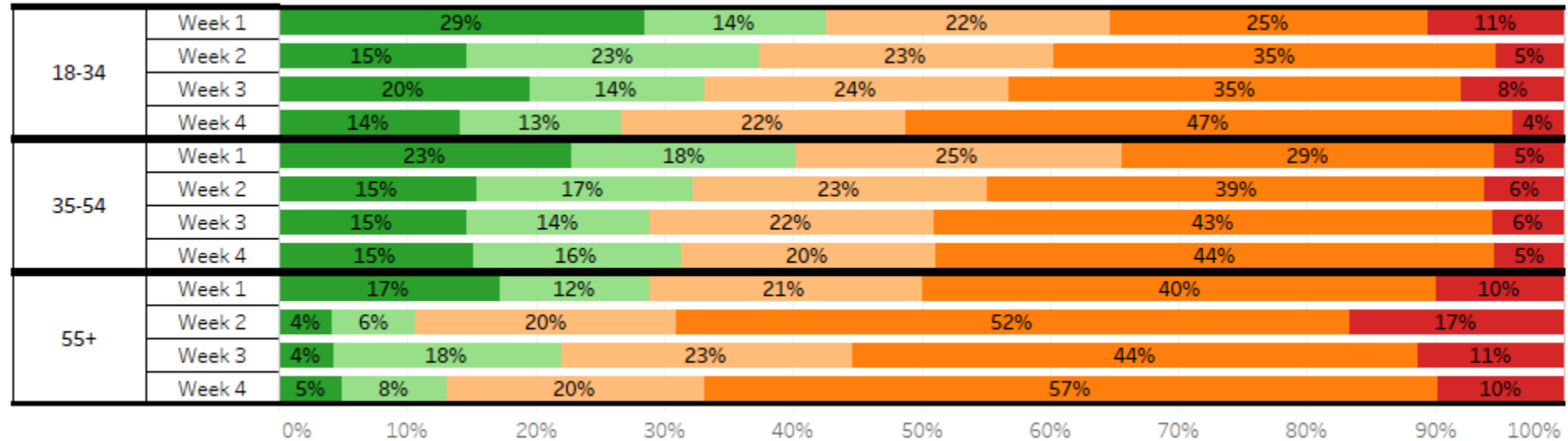
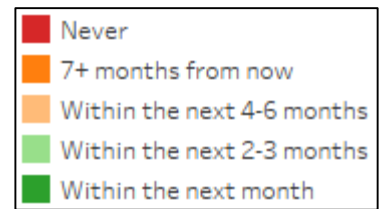
Philly, NYC and DC DMA residents, as of April 6



- 74% of travelers from our nearby DMAs indicated they would be unlikely or very unlikely to still vacation to Philadelphia if they had plans, consistent with last week.
  - This is consistent with the general population, where 76% of travelers say they would be unlikely.
  - Travelers ages 55+ are much less likely to still vacation here.
- The DC DMA is the least likely to still vacation in Philly (77%), while the Philly and NYC DMA show similar likelihood.

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

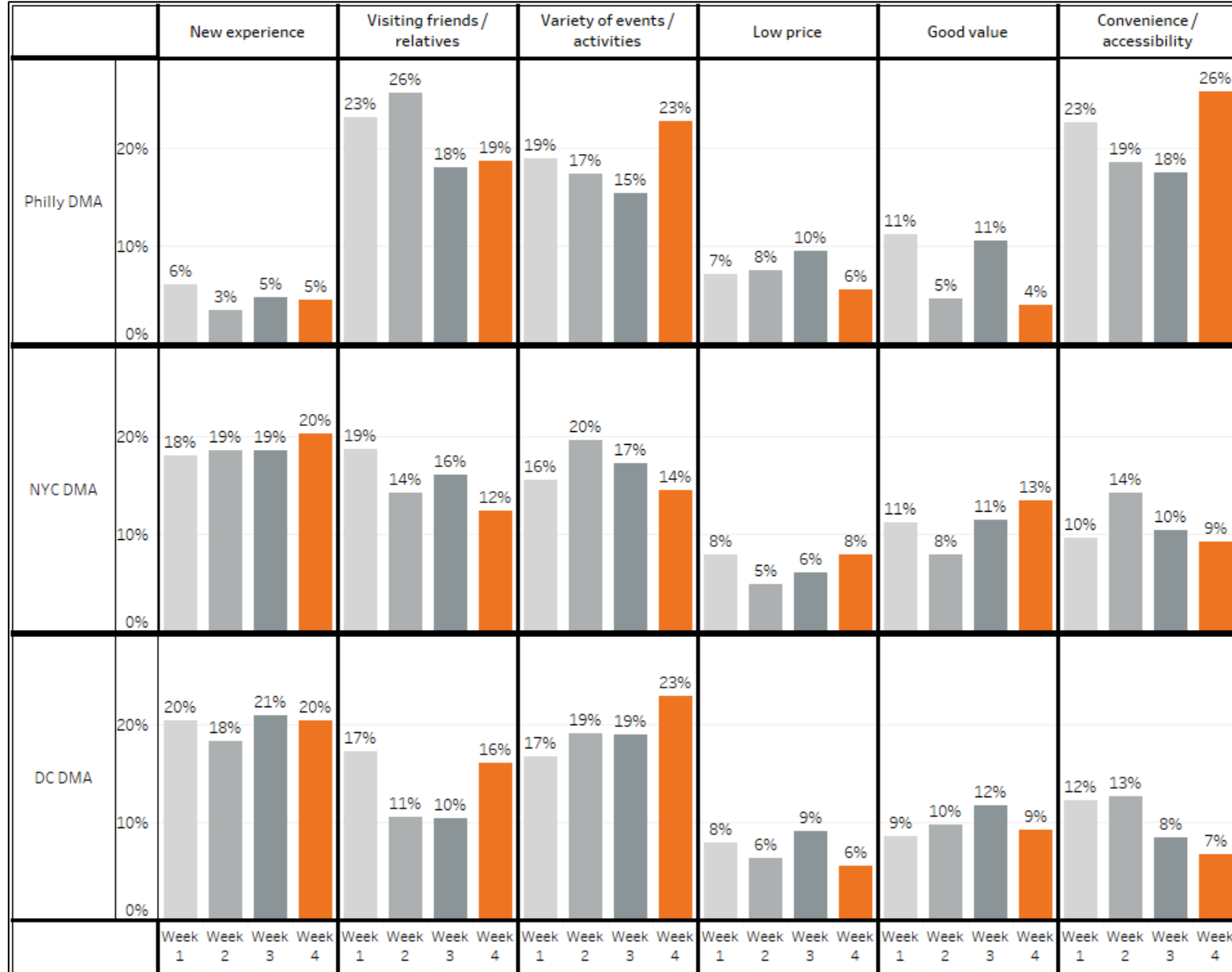
Philly, NYC and DC DMA residents, as of April 6



- 50% of residents from nearby DMAs would feel comfortable waiting 7 months from now to travel to Philadelphia, up from 41% last week.
  - This proportion is still highest for travelers aged 55+ (57%), with a 30% increase over last week where we saw this proportion drop.
  - Slightly more travelers among the general population want to wait this long (53%), especially those 55+ (60%).
- Philly DMA travelers still feel comfortable traveling sooner than NYC or DC. Only 39% said they would wait 7+ months, compared to 53% in NYC and 54% in DC.

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

As of April 6



- A variety of events/activities continue to be high motivator for all DMAs.
  - A new experience is still a high motivator for NYC and DC DMA residents, while convenience is higher for the Philly DMA.
- For the Philly DMA, convenience saw a 44% increase and variety of events saw a 53% increase.
- Low price continues to be a low motivator for all DMAs.

---

# Business Travel Implications

## Week 4 Results (as of April 6)

April 9, 2020

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

As of April 6

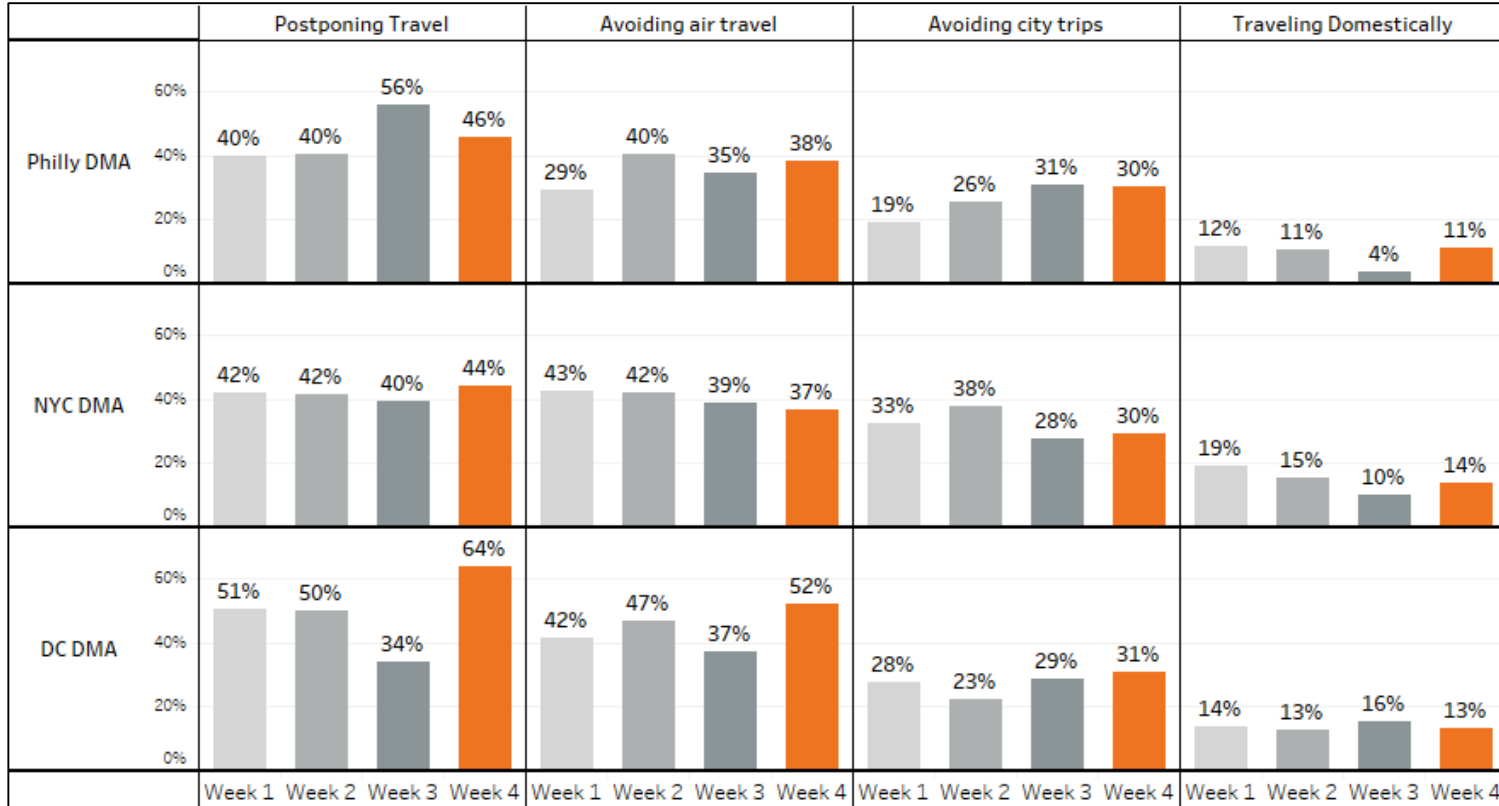
	Gen Pop
Week 1	62%
Week 2	68%
Week 3	65%
Week 4	71%

	Philly DMA	NYC DMA	DC DMA
Week 1	55%	73%	76%
Week 2	69%	86%	72%
Week 3	64%	73%	70%
Week 4	61%	80%	81%

- 71% of those that planned on traveling for business in the next 4 weeks in the general population have canceled or postponed, up from 65% last week.
- This proportion is higher for NYC (80%) and DC (81%) DMA residents, and lower for Philly DMA residents (61%). NYC and DC saw increases in cancellations/postponements compared to last week, and Philly saw a slight decrease.

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

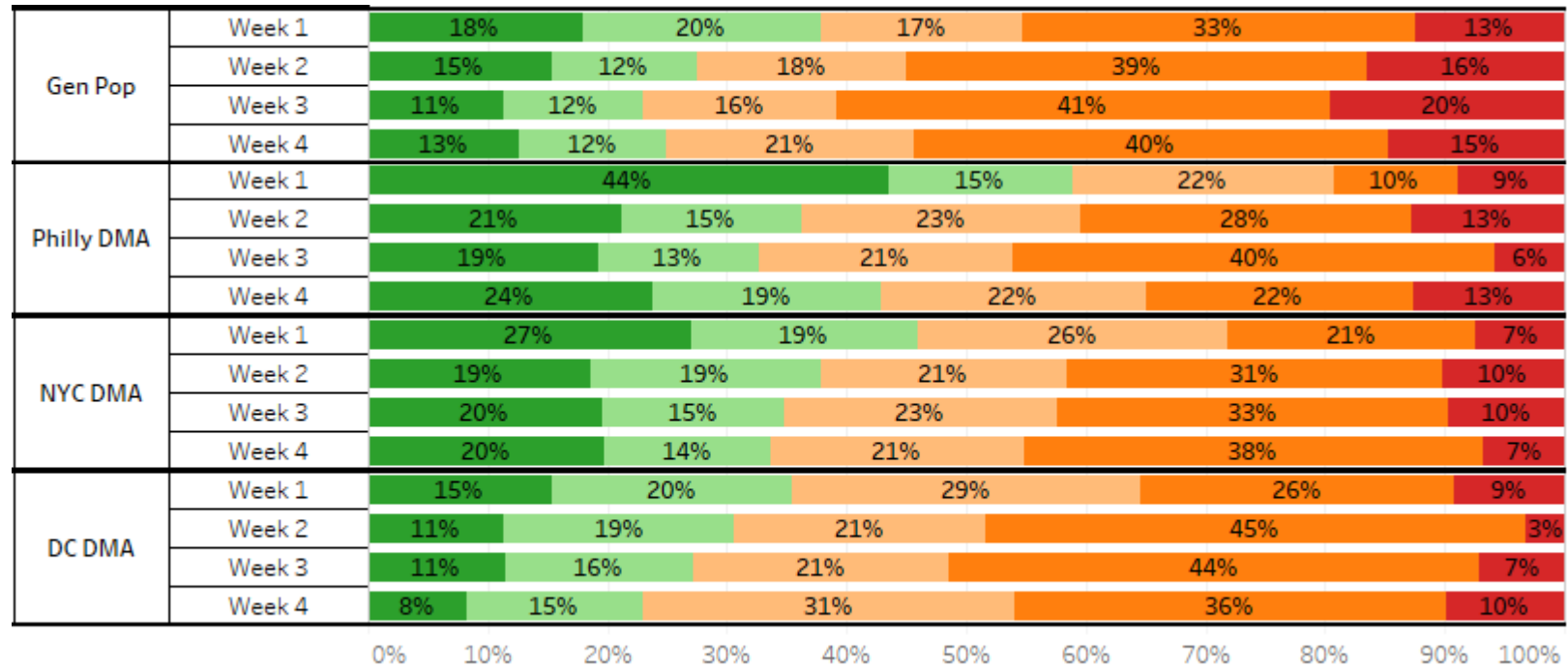
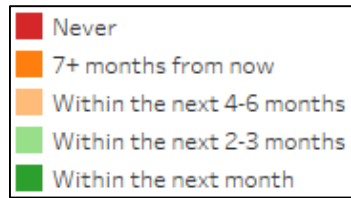
As of April 6



- 48% of business travelers among the nearby DMAs and the general population have indicated they are thinking of postponing travel.
  - Philly DMA saw a decrease over last week, while DC saw a large increase.
- Over a third of business travelers are still considering avoiding air travel, with a large increase from the DC DMA.
- Almost a third of business travelers are thinking of avoiding city trips, both within the nearby DMAs and among the general population.

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

As of April 6



- 40% 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 Philly DMA (22%), which saw a large decrease over last week (-45%).
- A higher proportion of business travelers among the Philly and NYC DMAs would feel comfortable traveling to Philly for business within the next month than the DC DMA.