

Russell RESEARCH

**VISIT
PHILADELPHIA**

Return to Traveling Report

October 2, 2020

Objectives & Methodology

Research Objectives:

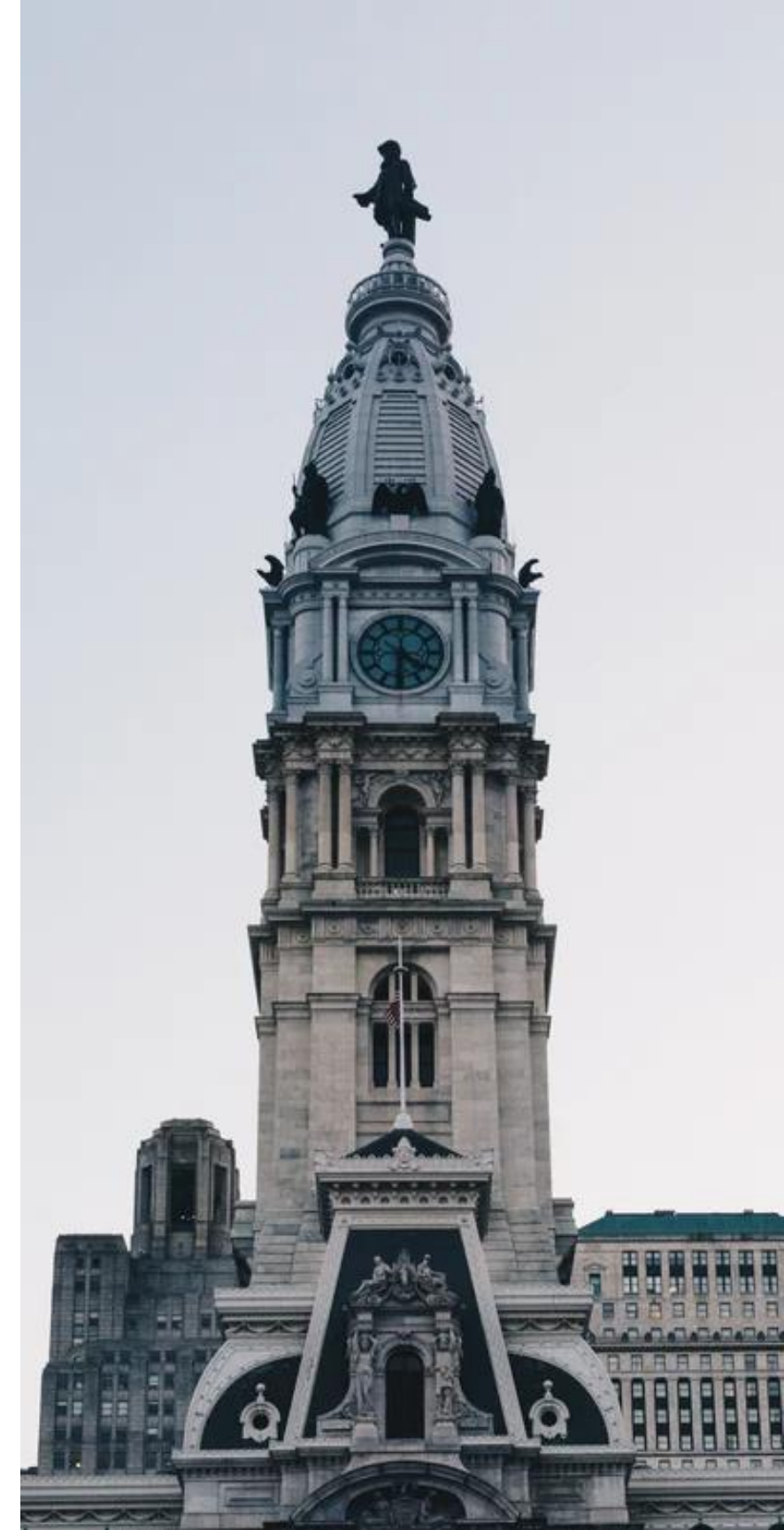
- The purpose of this study is to understand upcoming consumer travel plans in general and specifically to Greater Philadelphia as the COVID-19 pandemic continues.

Methodology:

- Fielded Sept 25-28
- The study is conducted using the Russell Omnibus platform targeting three DMAs – Philadelphia, Washington, D.C., and New York. The study is conducted using online methodology with all interviews conducted on the Russell Research survey website.
- A total of n=955 interviews were conducted, split out as follows:
 - Philadelphia n=252
 - Washington, D.C. n=201
 - New York n=502

Sample:

- Adults age 18+
- Have taken at least 1 leisure trip in the past 12 months



KEY INSIGHTS

1

One-half of travelers have at least some hesitation with traveling, with the Washington, D.C. DMA being most hesitant. This hesitation is impacting destination choice and trip length – **quick trips (1-2 nights) within 200 miles** being the most likely.

2

Travel by car with family or significant others remains the most common next trip type. On average, travelers are planning about three months and booking about two months prior to traveling. Travelers want to see COVID-19 information, cancellation policies, and lists of what's open and closed in areas when planning.

3

More than two-fifths of travelers have no plans to travel for any upcoming holidays; however, travelers who do plan on traveling are more likely to travel over Christmas/Hanukkah and Spring Break than shorter holiday weekends. **December is the highest planned travel month this fall/winter.**

4

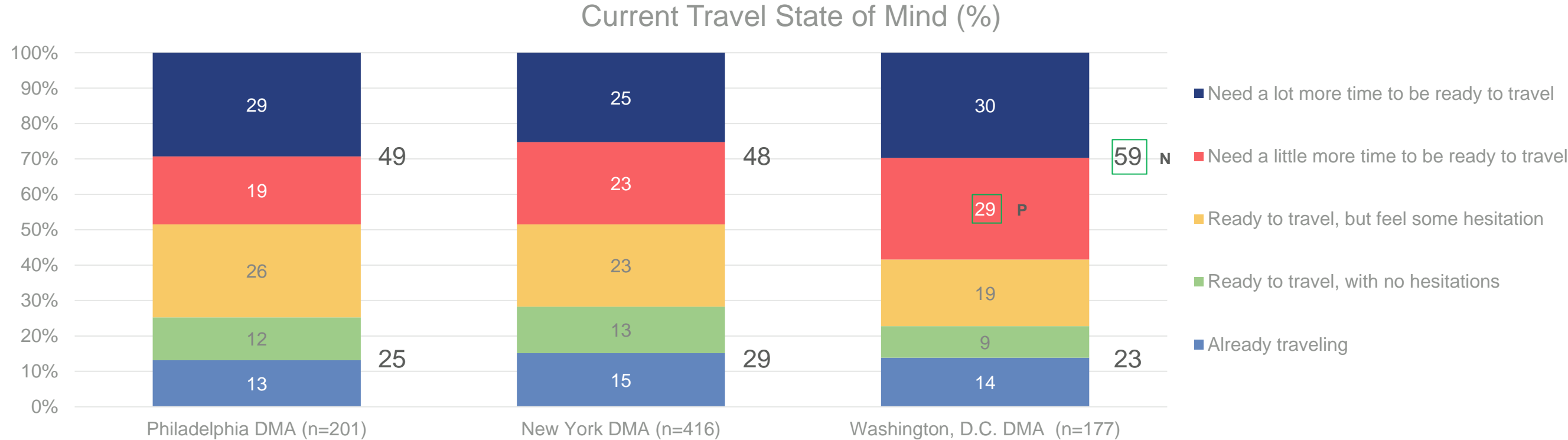
Greater Philadelphia travel plans are likely to involve **day trips for those who live in the Philly DMA** and **2 nights for those who live farther away.** Regional travelers are motivated most by getting away from home, and would be interested in general sightseeing and outdoor, historic attractions when visiting Philadelphia.

GENERAL TRAVEL BEHAVIORS

Current Travel State of Mind

Roughly one-quarter of travelers are already traveling or ready to travel with no hesitation, while another quarter are ready with some hesitation. One-half or more need more time to be ready to travel.

Travelers in the Washington, D.C. DMA have greater hesitation with traveling than the other two DMAs.



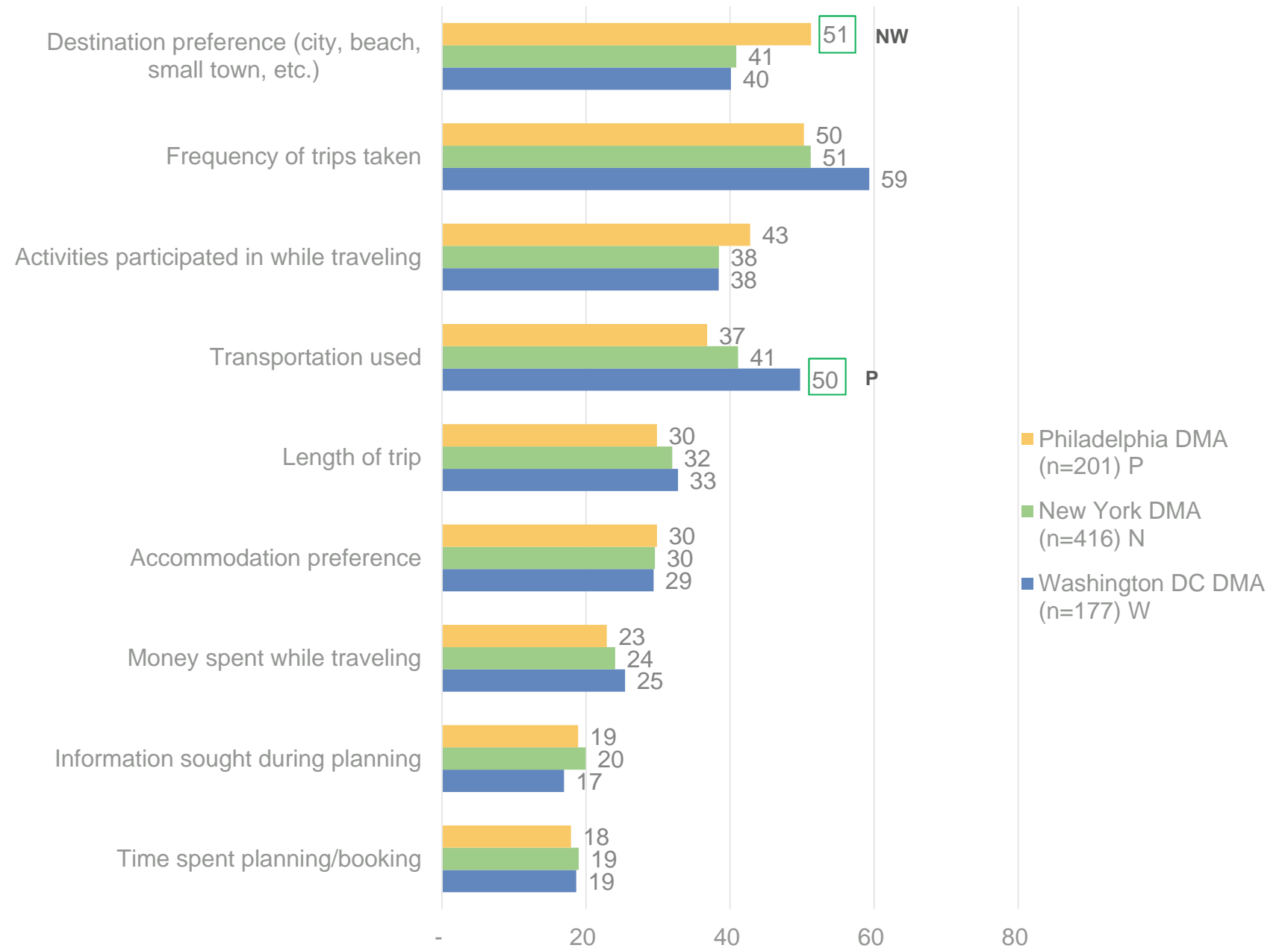
Base: Total Leisure Travelers
 Q.2: When it comes to getting back out and traveling again, which best describes your current state of mind?

Change In Travel Aspects Since COVID-19

COVID-19 has had the greatest impact on destination preference and frequency of trips taken across travelers in all three markets.

Philadelphia DMA travelers are significantly more likely to cite an impact on the destination preference, while Washington, D.C. DMA travelers are more likely to cite transportation used.

% Who Indicate Change In Travel Aspects Since COVID-19



Base: Total Leisure Travelers

Q.3: Which of the following aspects of travel have changed for you since the coronavirus?

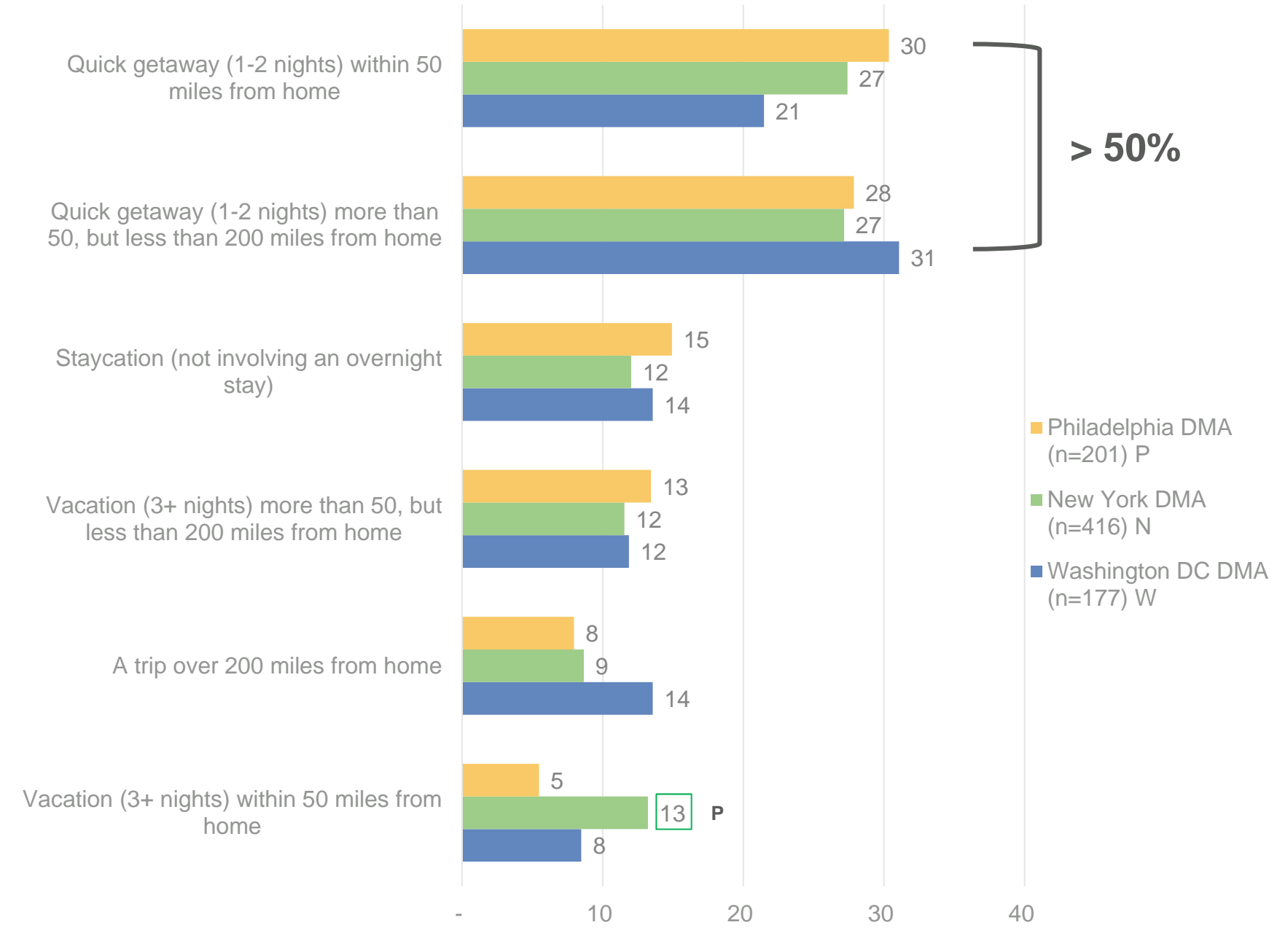
Close to Home Trip Type

Close to home trips are most likely to be “quick getaways,” less than 200 miles from home.

Travelers from Washington, D.C. DMA cite quick getaways that are farther away from home (50-200 miles vs. within 50 miles).

Travelers from the New York DMA are significantly more likely to cite vacations with 3+ nights stay within 50 miles from home than travelers from Philadelphia.

Close to Home Trip Type (%)

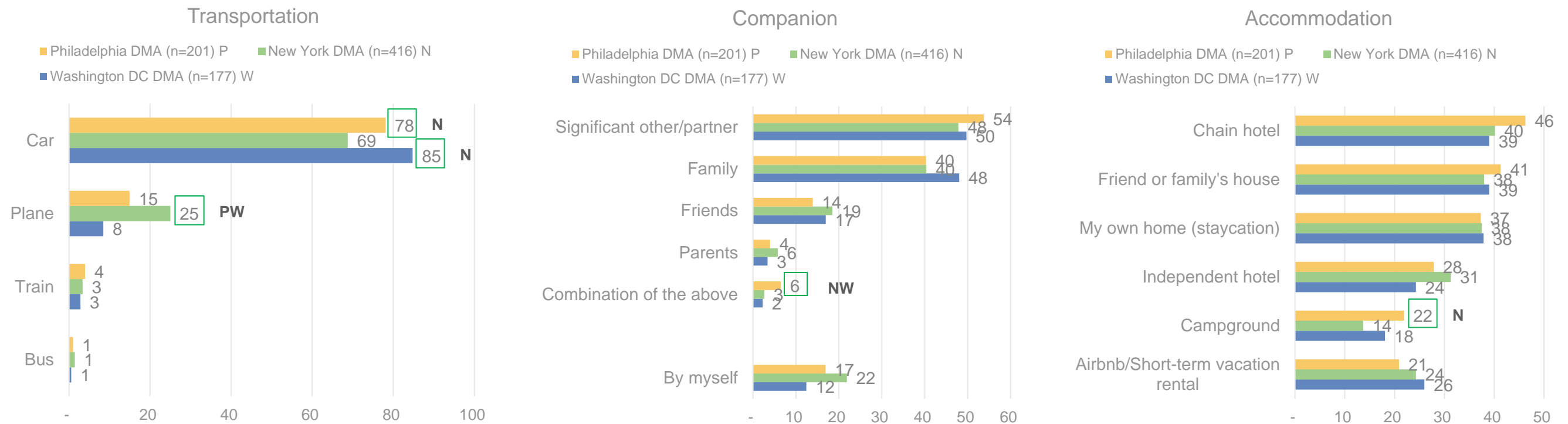


Base: Total Leisure Travelers
 Q.5: When you think about taking a trip close to home, what does it look like?

Type of Next Trip

The next leisure vacation is most likely to be by car with family and involve either a chain hotel, family/friend's home, or their own home.

Travelers from the New York DMA are significantly more likely to travel by plane, while travelers from the Philadelphia DMA are more likely to travel with a combination of people and to a campground when compared to travelers from the other DMAs.



Base: Total Leisure Travelers
 Q.4: What type of transportation would you feel most comfortable using to travel to your next leisure destination?
 Q.6: Who would you be traveling with?
 Q.7: Which of the following accommodation types would you feel comfortable staying in during your next trip?

Trip Planning & Booking Sources

Online review sites, word of mouth from friends/family, and destination websites are the most common planning resources.

When it comes to actually booking travel, one-half of travelers go directly to the hotel/airline, the most common booking source across DMAs. Destination websites are used the least, but travelers in the New York DMA are using them more than those in the Washington, D.C. DMA.

Trip Planning

	Philadelphia DMA	New York DMA	Washington DC DMA
Total Leisure Travelers	(201)	(416)	(177)
	%	%	%
	P	N	W
Online review sites	47	41	45
Word of mouth from friends/family	45	45	44
Destination websites	41	36	37
Online travel agencies or OTAs	38	38	30
Travel guides/magazines	21	19	20
Social media	13	23 P	19

Trip Booking Sources

	Philadelphia DMA	New York DMA	Washington DC DMA
Total Leisure Travelers	(201)	(416)	(177)
	%	%	%
	P	N	W
Hotels/airlines directly	55	51	55
Online travel agencies or OTAs	35	43	40
Loyalty programs	29 W	28	20
Online review sites	26	27	26
Destination websites	18	22 W	15

Q.8: What do you use to plan your travel?
 Q.9: What do you use to book your travel?

Trip Planning/Booking Timeframe

On average, travelers are likely to plan/research their next leisure trip about three months in advance and are booking about two months in advance. This is consistent across DMAs.

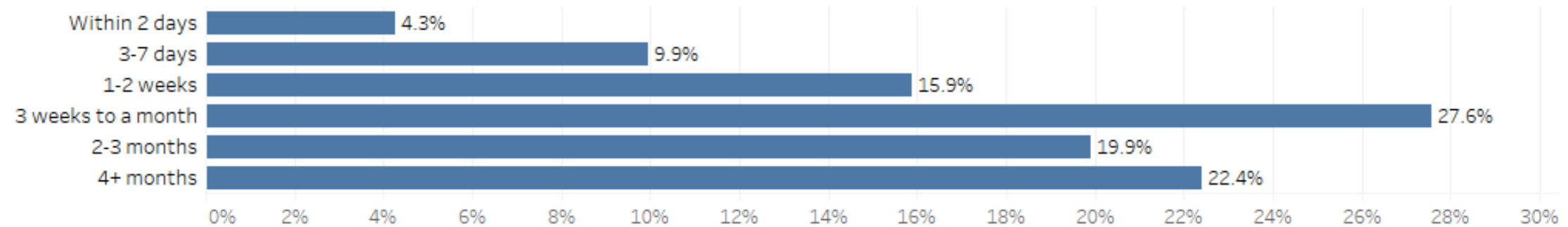
	Philadelphia DMA	New York DMA	Washington DC DMA
Total Leisure Travelers	(201)	(416)	(177)
	%	%	%
	P	N	W
Planning/Researching Leisure Trip (average number of days)	80.5	92.5	92.4
Booking Leisure Trip (average number of days in advance)	66.1	76.9	73.1

Q.10: Thinking about your next leisure trip, how far in advance would you start planning and researching for it?
 Q.11: Thinking about your next leisure trip, how far in advance would you actually book the trip before arriving?

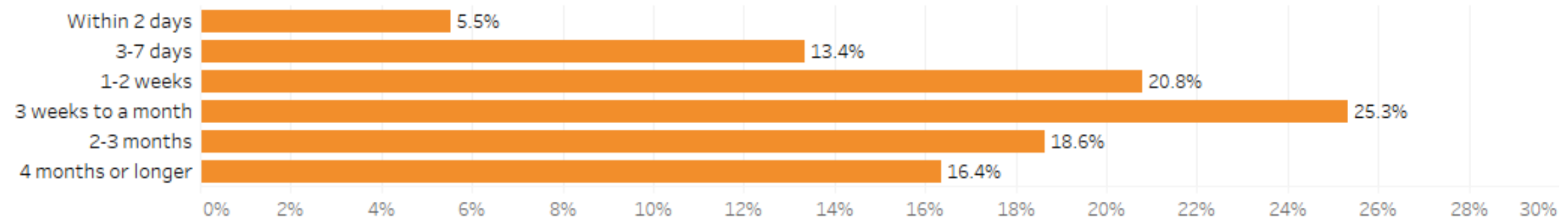
Trip Planning/Booking Timeframe

Looking closer at the distribution of planning and booking windows, we see that most travelers are actually planning and booking 3 weeks to a month in advance. These windows are shorter for those that indicated they were ready to travel or already traveling.

Planning/Researching



Booking



Q.10: Thinking about your next leisure trip, how far in advance would you start planning and researching for it?
 Q.11: Thinking about your next leisure trip, how far in advance would you actually book the trip before arriving?

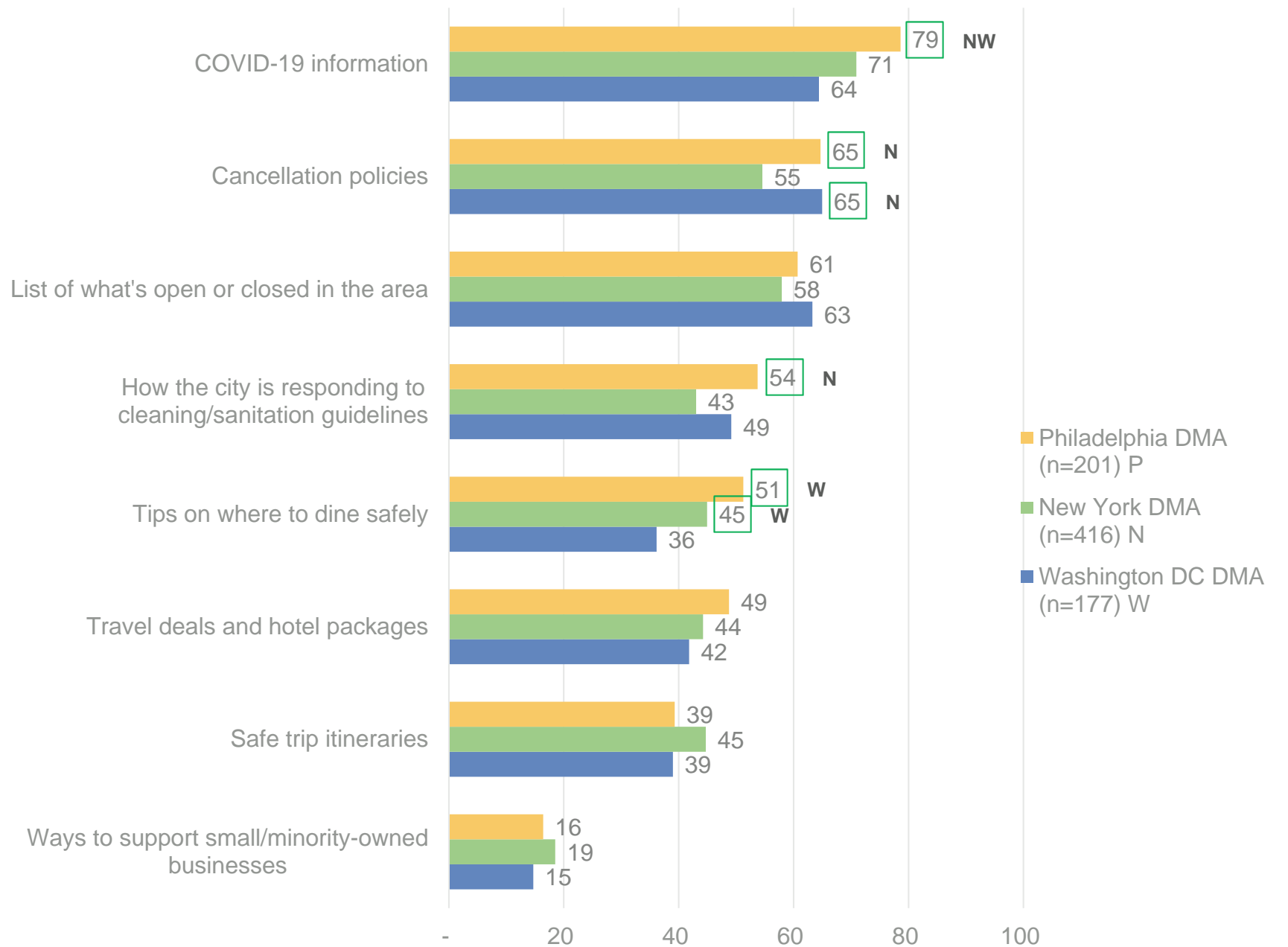
Trip Planning Content

Travelers want to see COVID-19 information, cancellation policies, and a list of what's open and closed in areas.

Travelers from Philadelphia are more concerned with COVID-19 information and a destination's response to cleaning/ sanitation guidelines.

Travelers in the New York DMA are less concerned with cancellation policies and DC DMA travelers are less concerned with safe dining tips.

Helpful Trip Planning Content (%)



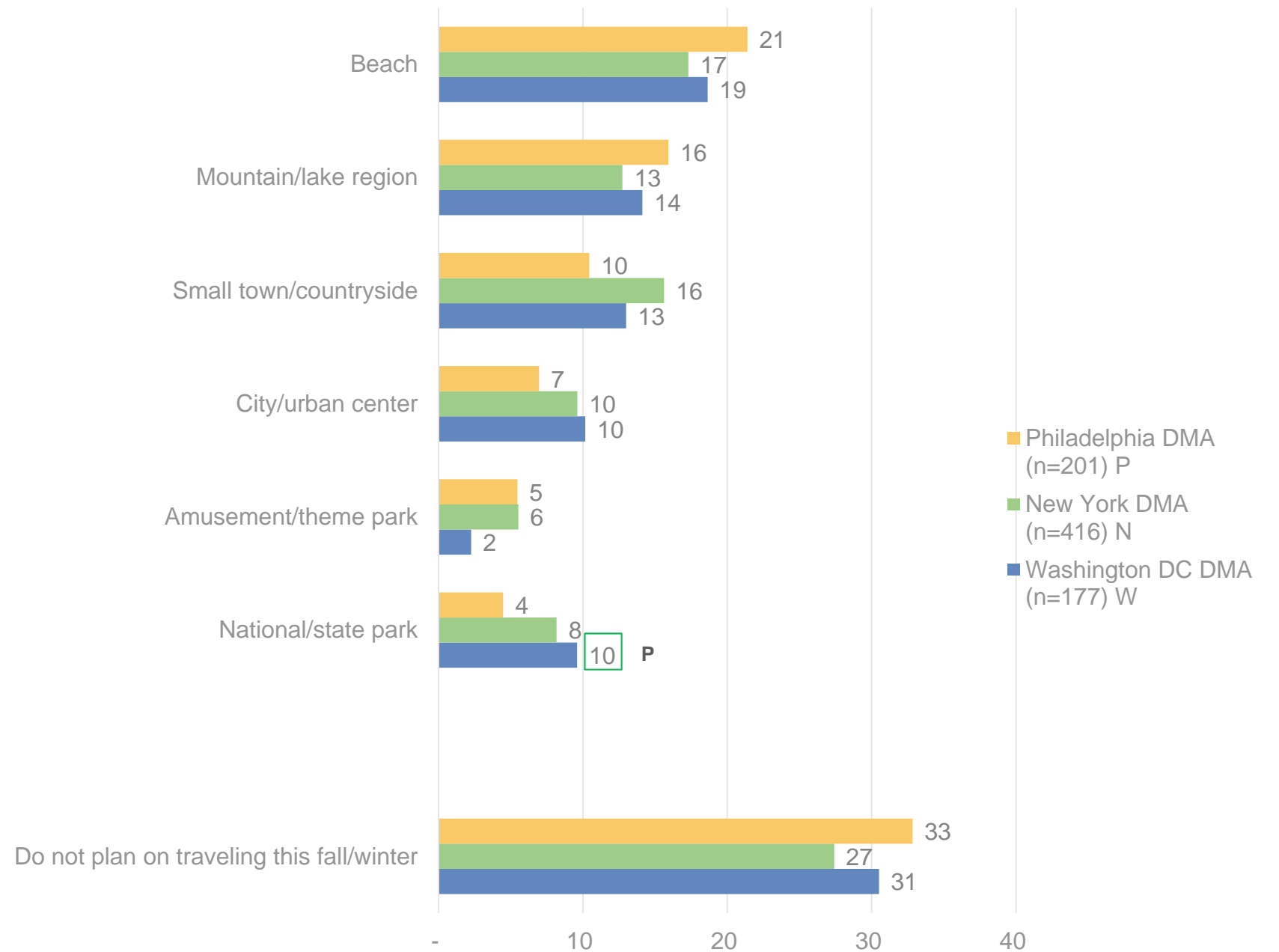
Base: Total Leisure Travelers
 Q.12: What kinds of information do you want to see to help with travel planning?

Destination Type for Fall/Winter Leisure Trips

Roughly three in ten travelers do not plan on traveling this fall or winter.

Among those who do plan on traveling, the beach, mountain/lake region, or small town/countryside are the most common destination type.

Fall/Winter Leisure Trip Destination Type (%)



Base: Total Leisure Travelers

Q.13: What type of destination are you most likely to visit on a leisure trip this fall and/or winter

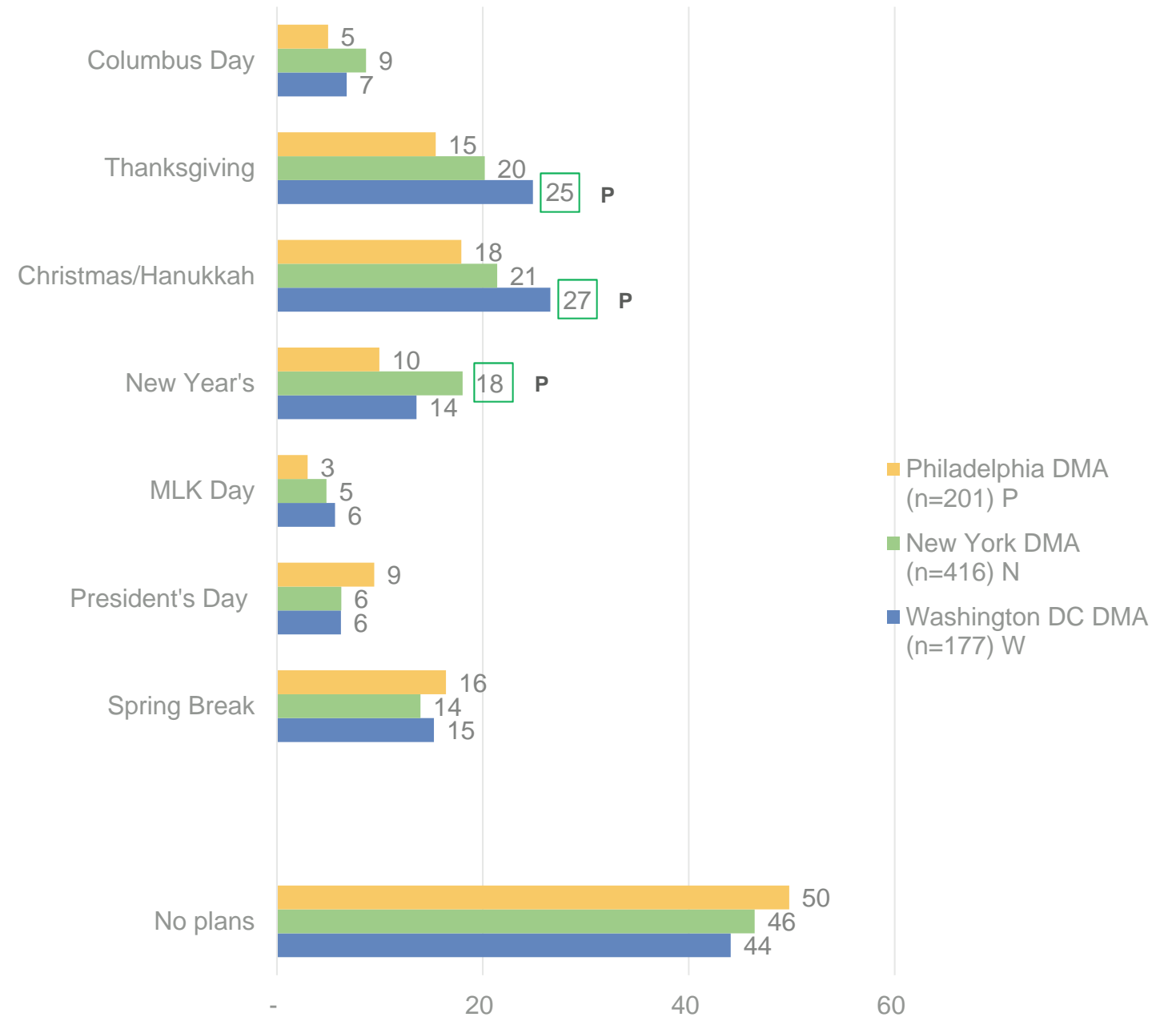
Holiday Leisure Travel Plans

More than two-fifths of travelers have no plans to travel for any upcoming holidays.

Travelers who do plan on traveling are more likely to cite Christmas/Hanukkah, Thanksgiving, and Spring Break.

New Year's Eve is cited significantly more among travelers in the New York DMA, while Christmas/Hanukkah and Thanksgiving are cited significantly more by travelers in Washington, D.C.

% Planning Holiday Leisure Travel



Base: Total Leisure Travelers

Q.15: For which of the following holidays this year and next are you planning on traveling for leisure?

Travel Destination Consideration

(Definitely/Probably Would)

Regardless of destination, travel consideration increases as travel timing pushes out farther. Travelers are most likely to travel within their own area.

Travel consideration to Philadelphia is highest among travelers in the Philadelphia and New York DMAs.

Philadelphia DMA

	Philadelphia, PA	New York City, NY	Washington, D.C.	Baltimore, MA
Total Leisure Travelers	(n=201)	(n=201)	(n=201)	(n=201)
	%	%	%	%
<u>Next 3 Month</u> Consideration	30	22	22	18
<u>Next 6 Month</u> Consideration	37	26	24	26
<u>Next 12 Month</u> Consideration	47	40	38	36

New York DMA

	Philadelphia, PA	New York City, NY	Washington, D.C.	Baltimore, MA
Total Leisure Travelers	(n=416)	(n=416)	(n=416)	(n=416)
	%	%	%	%
<u>Next 3 Month</u> Consideration	30	38	25	21
<u>Next 6 Month</u> Consideration	31	43	28	24
<u>Next 12 Month</u> Consideration	38	50	35	27

Washington, D.C. DMA

	Philadelphia, PA	New York City, NY	Washington, D.C.	Baltimore, MA
Total Leisure Travelers	(n=177)	(n=177)	(n=177)	(n=177)
	%	%	%	%
<u>Next 3 Month</u> Consideration	22	24	46	23
<u>Next 6 Month</u> Consideration	31	30	47	33
<u>Next 12 Month</u> Consideration	34	37	55	37

Base: Total Leisure Travelers

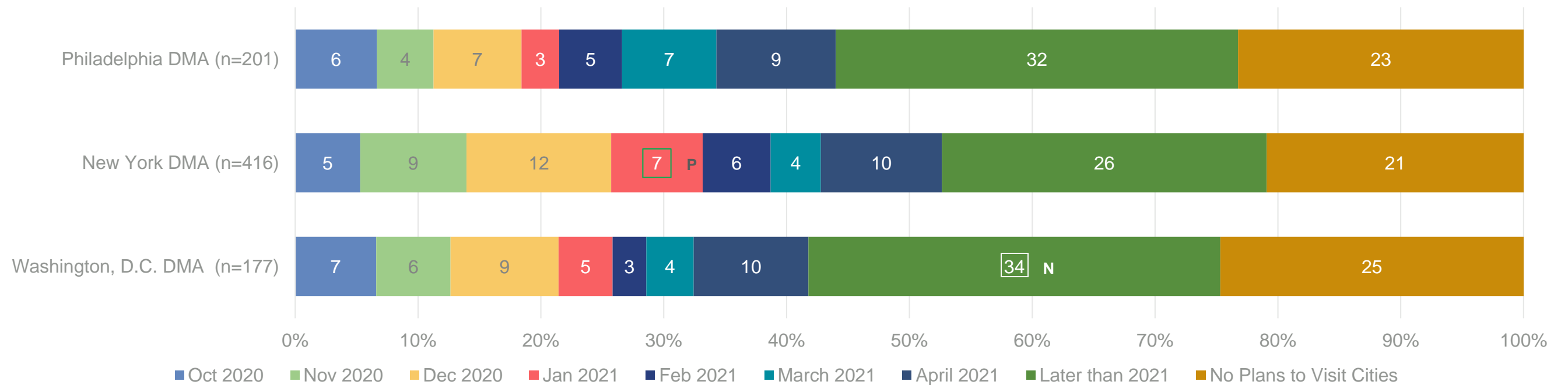
Q.16/17/18: How likely are you to consider visiting each of the following cities for a weekend leisure trip in the next 3 months/next 6 months/next 12 months?

Most Likely Time to Take a Trip

The majority of travelers in each DMA are not planning to travel in the next six months. Travelers in the New York DMA are more likely to travel in the near-term.

December is the most popular month for travel this fall/winter across travelers.

Timeframe Likely to Visit Key Cities



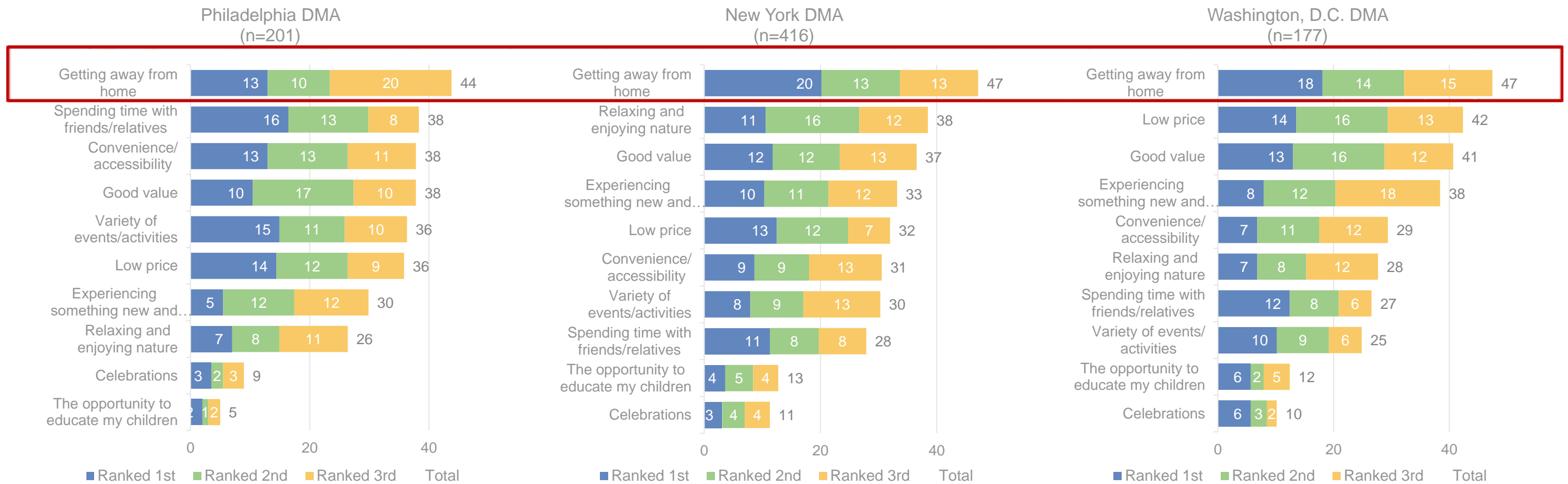
Base: Total Leisure Travelers
 Q.19: If you did visit one of these cities for a vacation/getaway, when are you most likely to take that trip?

GREATER PHILADELPHIA QUESTIONS

“For the next set of questions, we would like you to think about planning a trip to Philadelphia this fall and/or winter. By Philadelphia, we mean not *just* the downtown, but also Greater Philadelphia (including Bucks, Chester, Montgomery and Philadelphia counties).”

Top 3 Motivations to Travel to Philadelphia This Fall/Winter

Getting away from home is the top motivator to visit Philadelphia across travelers in each of the three DMAs. More travelers in the Philadelphia DMA are motivated by spending time with family/friends and convenience, while New York travelers are motivated by relaxing and DC travelers are motivated by low price.

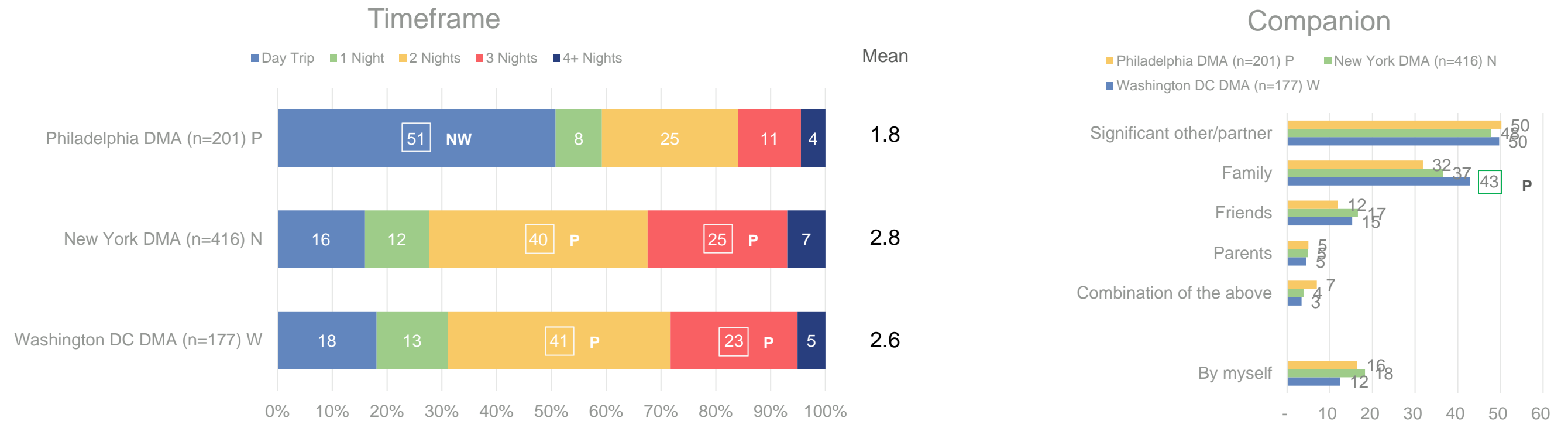


Base: Total Leisure Travelers
 Q.20: Please choose the top three factors that would most motivate you to travel to Philadelphia this fall and/or winter.

Philadelphia Travel Details If Planning Trip This Fall/Winter

Trips to Philadelphia would more likely be day trips among those already in the Philadelphia DMA, while 2-night stays would be more common among travelers from the other DMAs.

Travel to Philadelphia with a significant other and/or family is most likely.

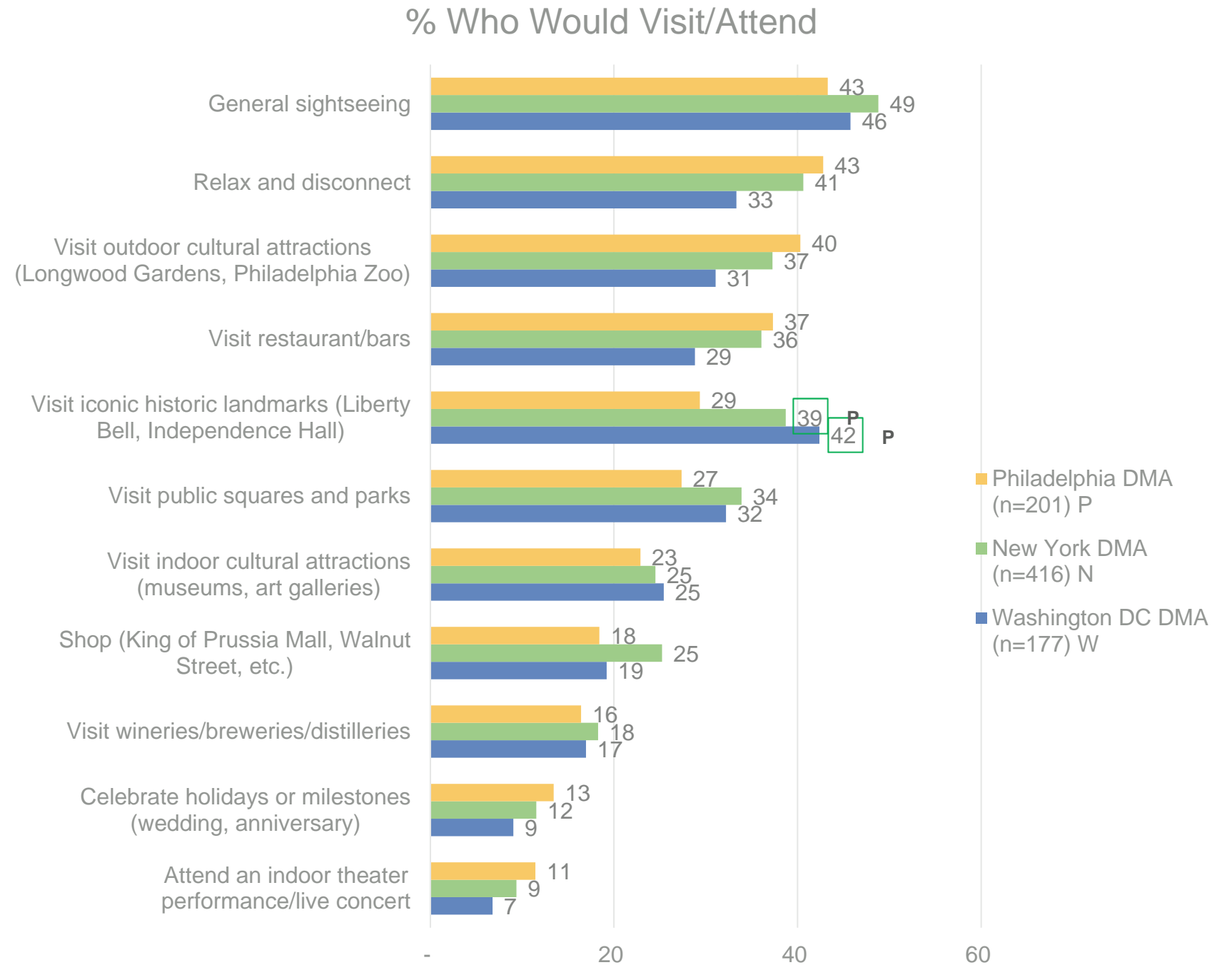


Base: Total Leisure Travelers
 Q.21: How long would you plan to stay in Philadelphia for a trip this fall and/or winter?
 Q.22: Who would you be traveling with during your trip to Philadelphia?

Attractions Would Visit/Attend In Philadelphia this Fall/Winter

General sightseeing is the most cited activity regardless of where the travelers are from. Secondly, travelers cite relaxing and disconnecting, visiting historic landmarks (NY and D.C. DMA only), and visiting outdoor attractions.

Travelers in the Philadelphia DMA are significantly less likely to cite iconic historic landmarks.



Base: Total Leisure Travelers
 Q.23: What would you plan to do during your trip to Philadelphia?

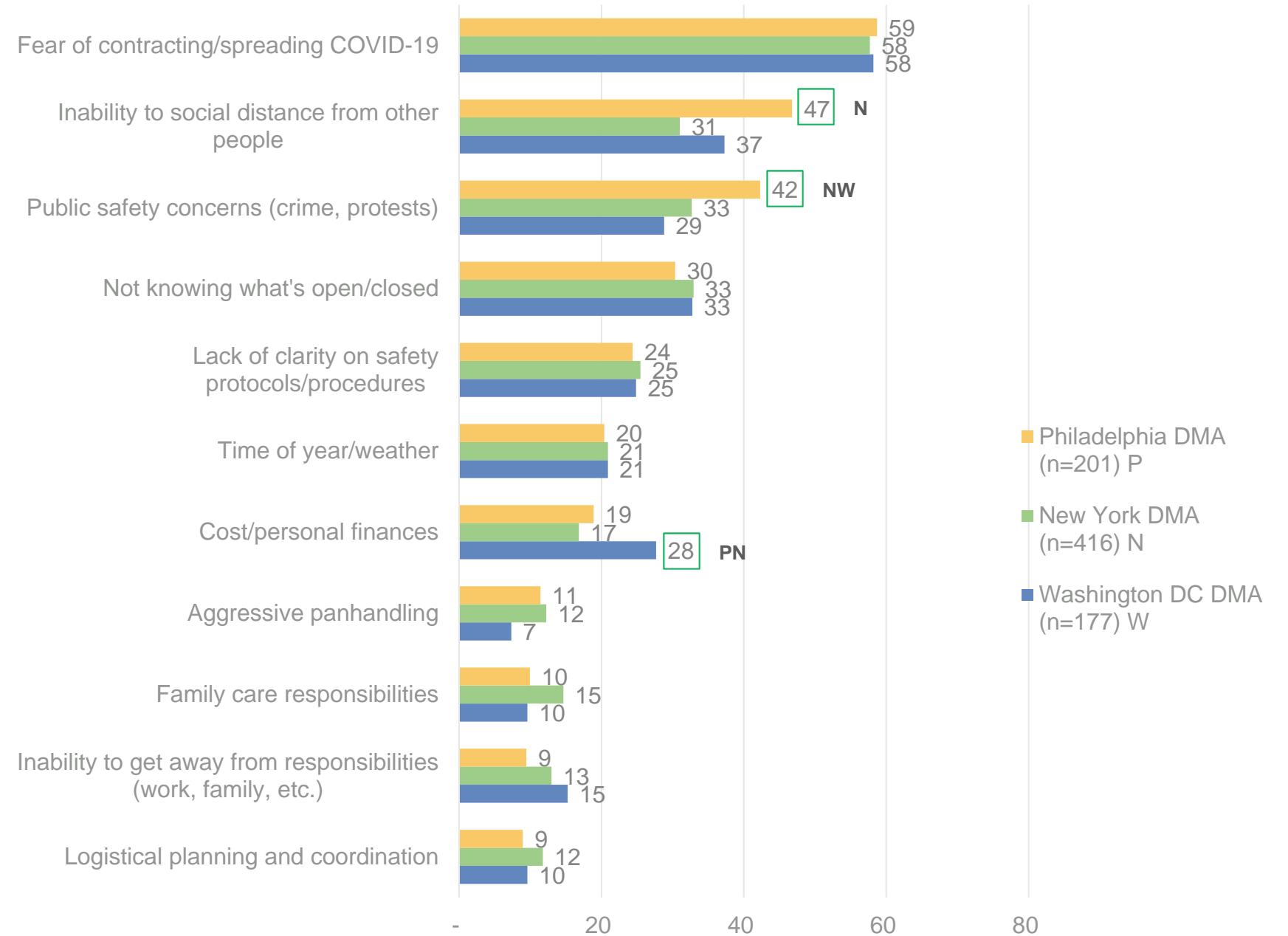
Factors Giving Most Travel Anxiety

Fear of contracting/spreading COVID-19 gives the greatest anxiety across travelers from the three DMAs.

Travelers from the Philadelphia DMA are significantly more likely to have anxiety involving the inability to social distance and concern for public safety.

Travelers from the Washington, D.C. DMA are significantly more likely to cite anxiety relating to cost/personal finance.

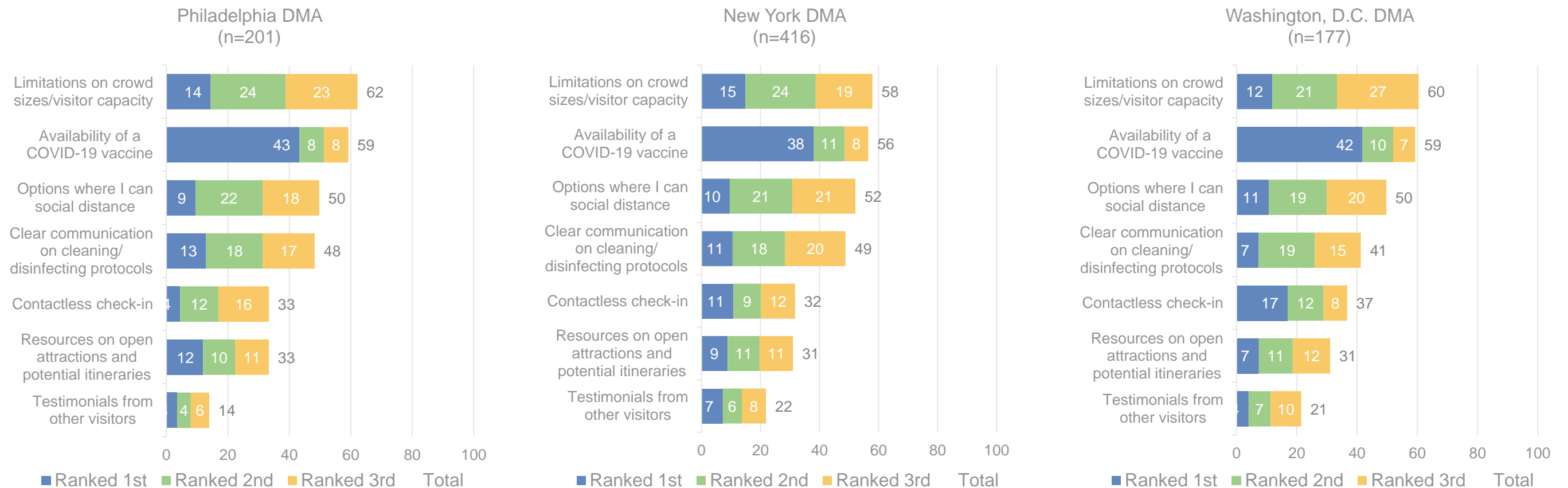
% Who Indicate Factor Gives Anxiety



Base: Total Leisure Travelers
 Q.24: What aspect of traveling to Philadelphia is giving you the most anxiety at the moment?

Top 3 Ranked Factors That Would Help Alleviate Concerns

Limitations on crowd sizes/visitor capacity and availability of a vaccine are the top two factors that would alleviate concerns.



Base: Total Leisure Travelers
 Q.25: What would help alleviate your concerns to travel to Philadelphia where an overnight paid stay was required this fall and/or winter?

VISIT PHILADELPHIA'S APPLICATIONS

REGIONAL VS NATIONAL INSIGHTS



Compared to national findings, travelers in our region are more motivated by “escape”

Dining & shopping are top trip activities nationally, outdoor activities & iconic sites are higher on the list regionally

Travelers in our region are more likely to “stay with friends and family” right now, compared to national travelers (40% vs 25%)

SIZING THE OVERNIGHT OPPORTUNITY

Boost Image

60% of Respondents:
All Travelers in PHL, NYC & DC DMAs open to staying in paid accommodations

Build Intent

49% of Respondents:
Travelers Open to Taking a Leisure Trip to a NE City & staying in paid accommodations

Inspire Planning

22% of Respondents Open to Visiting Philadelphia Within Next Year & Stay in Paid Accommodations

Drive Booking

11% of Respondents Ready to Travel Now & Open to Staying in Paid Accommodations in Philly in Next 3 Months

OVERNIGHT TARGET

- 1** **Skews older** target (35+) with **higher HHI** (\$150k+)
- 2** **Motivations more likely to be getting away from home**, finding good value, and having a new experience (vs. low price and spending time with family and friends)
- 3** **More likely to be travelling as couples or family unit** (vs. alone or with friends)
- 4** Of those open to staying in paid accommodations in Philadelphia within the next year, they're **more likely to come from NYC DMA** (vs. PHL or DC DMAs)