

Impact of COVID-19 on Travel Industry

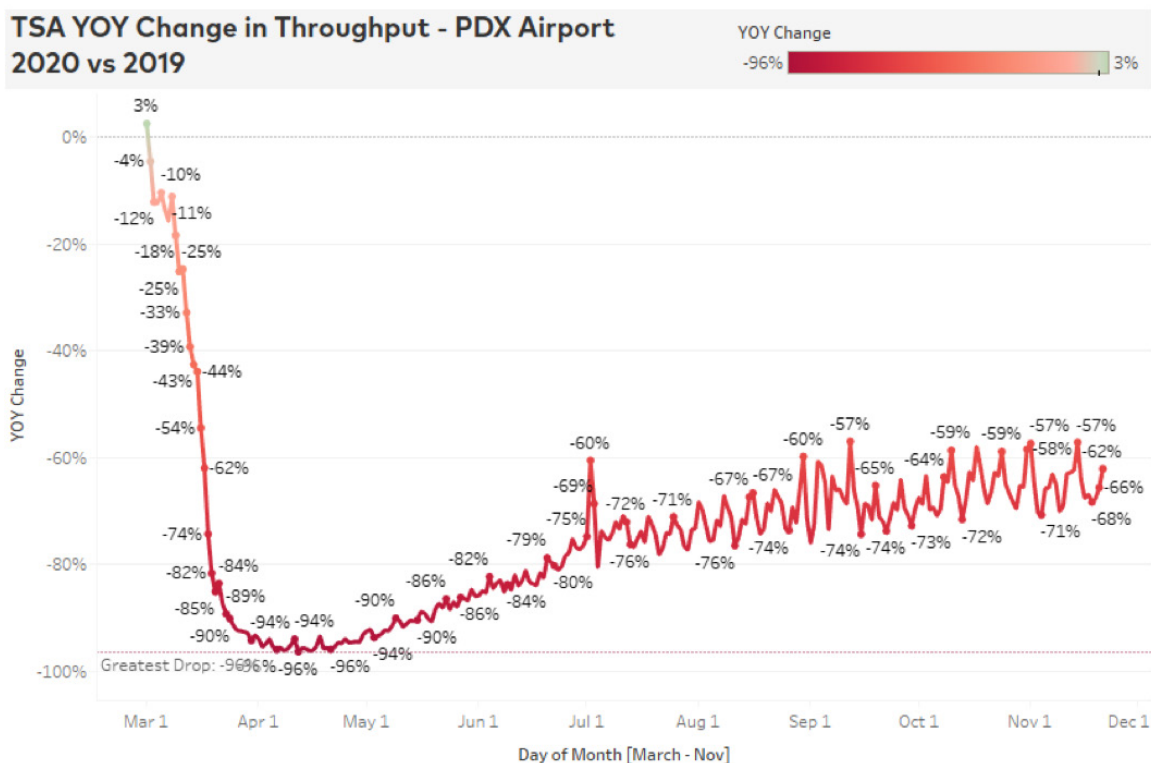
November 24, 2020

To help share information about COVID-19 impacts to the travel industry, Travel Oregon's research team is compiling state and national data on a bi-weekly basis to share with external partners. The data below is this week's summary and is for informational purposes only.

PDX Airport Data

The TSA reported 8,997 passengers utilized the checkpoints on Saturday, an increase of 1,149 over the previous Saturday. Throughput numbers have started a downward trend since the start of October. However, YOY change in throughput continues to climb very steadily.

STR Monthly Data (Month of October)



- In comparison with the same month in 2019, the Oregon hotel performance recorded the following:
 - Occupancy: -18% to 56.1%
 - ADR (Room Rate): -18.9% to US\$98.45
- RevPAR: -33.5% to US\$55.23
- Oregon continues to outperform the US and Pacific NW in all three metrics.

OREGON LODGING STATISTICS October 2020 (Month)												
Region	Occupancy (%)		Room Rate (\$)		RevPAR (\$)		Room Supply		Room Demand		Room Revenue (\$)	
	Month	% Chg	Month	% Chg	Month	% Chg	Month	% Chg	Month	% Chg	Month	% Chg
United States	48.3	(30.1)	97.61	(26.8)	47.13	(48.8)	162,374,962	(2.2)	78,391,405	(31.6)	7,652,131,057	(50.0)
Pacific	50.4	(33.0)	119.70	(29.4)	60.33	(52.7)	22,623,583	(5.7)	11,403,277	(36.8)	1,364,919,502	(55.3)
Statewide	56.1	(18.0)	98.45	(18.9)	55.23	(33.5)	2,076,070	(1.4)	1,164,807	(19.1)	114,669,617	(34.4)
Eastern	55.8	(10.9)	82.84	(1.5)	46.21	(12.3)	145,359	(0.8)	81,079	(11.7)	6,716,844	(13.0)
Central	60.9	(3.5)	111.44	(3.1)	67.82	(6.4)	179,180	2.8	109,049	(0.7)	12,152,785	(3.8)
Southern	77.5	8.7	91.19	(1.1)	70.71	7.6	269,638	1.1	209,070	9.9	19,065,759	8.7
Willamette Valley	60.5	(4.9)	93.59	(18.5)	56.65	(22.5)	335,203	1.5	202,909	(3.5)	18,989,525	(21.4)
Mt Hood/Gorge	55.7	(17.1)	100.38	(6.6)	55.92	(22.6)	71,455	4.2	39,804	(13.6)	3,995,582	(19.3)
Portland Metro	41.0	(45.5)	92.33	(34.3)	37.89	(64.2)	733,026	(5.4)	300,795	(48.5)	27,771,868	(66.1)
Coast	64.7	7.4	113.25	1.0	73.31	8.5	341,000	0.5	220,738	7.9	24,998,100	9.0
Source: STR												

Sources: STR

STR Weekly Data (November 8 to November 14)

- In comparison with the same week in 2019, the Oregon hotel performance recorded the following:
 - Occupancy: -22.5% to 47.88%
 - ADR (Room Rate): -21.2% to US\$91.98
 - RevPAR: -39.1% to US\$44.10
- Southern Oregon is the region with highest occupancy (69.54%) and RevPAR (\$62.67) for the week.
- Portland is still showing the lowest occupancy (38.51%) and RevPAR (\$34.79).

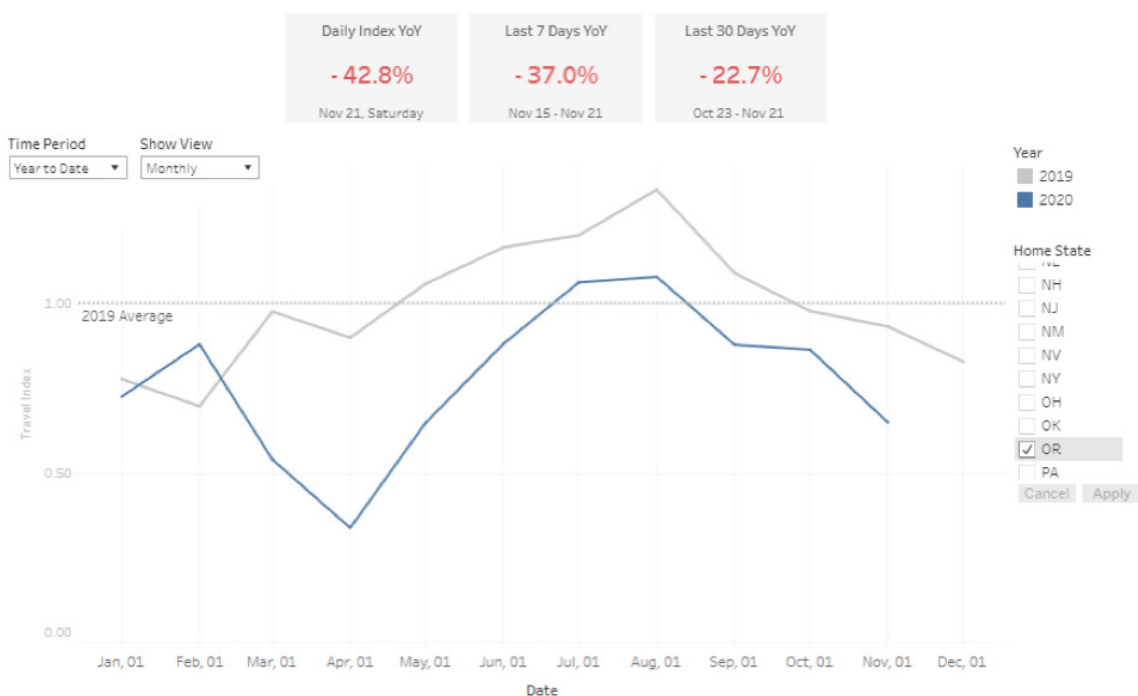


Weekly STR Stats (% Chg YOY) (November 8 to November 14)

	Occupancy (%)	Room Rate (\$)	RevPAR (\$)	Room Supply	Room Demand	Room Revenue (\$)
Oregon	47.88% -22.5%	\$91.98 -21.2%	\$44.10 -39.1%	467,593 -1.3%	223,864 -23.5%	\$20,620,954 -39.8%
Central	43.72% -4.5%	\$95.36 -2.7%	\$41.71 -7.1%	40,460 2.8%	17,688 -1.8%	\$1,687,771 -4.5%
Coast	50.67% -2.0%	\$99.54 -3.2%	\$50.88 -5.3%	77,000 0.5%	39,018 -1.6%	\$3,918,030 -4.8%
Eastern	47.06% -6.2%	\$77.57 -1.5%	\$36.51 -7.8%	32,823 -0.8%	15,448 -7.0%	\$1,198,511 -8.6%
Hood/Gorge	43.56% -15.5%	\$87.02 -5.3%	\$38.01 -19.9%	16,135 4.2%	7,028 -11.9%	\$613,288 -16.5%
Portland	38.51% -47.9%	\$90.29 -32.1%	\$34.79 -64.9%	165,522 -5.1%	63,740 -50.5%	\$5,757,936 -66.7%
Southern	69.54% 20.6%	\$90.05 4.5%	\$62.67 25.9%	59,689 1.1%	41,509 22.0%	\$3,740,982 27.3%
Willamette Valley	52.23% -17.0%	\$89.78 -21.2%	\$46.94 -36.5%	75,691 1.5%	39,531 -15.8%	\$3,552,582 -35.5%

Arrivalist Daily Travel Index

- Over the past month, Arrivalist data indicates that Oregon has seen a 22.7% drop in travels at least 50 miles from home (within and to Oregon). For the month, we're lagging behind the US, which had 14.5% drop. See the following chart for the Oregon data.

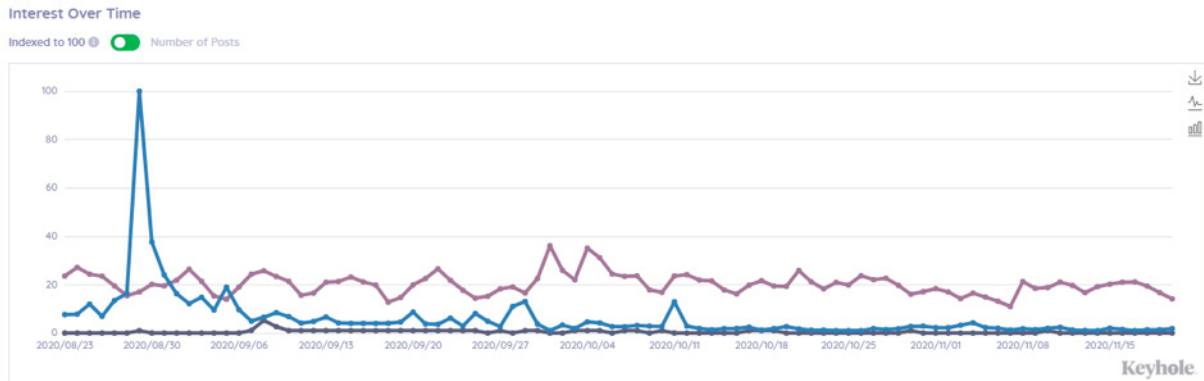


Daily drive market index of US travelers who moved at least 50 miles from home and spent a minimum of 2 hours on their journey. The index is based on the average daily volume of 2019 travelers.
Last Updated: Nov 21, 2020

Social Sentiment + Hot Topics

The information provided below is a summary of national coverage, media trends and what people across the U.S. are sharing online. The statements do not represent Travel Oregon's views or agency position.

Coronavirus cases are soaring in Oregon and across the county; on Sunday, Oregon reported [1,517 cases, a new record for the 4th day in a row](#), with Multnomah County reporting nearly a third of the cases. In the U.S. overall, we have exceeded [12 million cases](#) with nearly 257,000 deaths.



Analytics

Topic	Posts	Users	Potential Impressions
#COVID-19	50.5M	43.1M	694.9B
Portland	15.4M	13.2M	74.8B
#OregonFires	367.8K	358.6K	798.5M

The conversations we're tracking have largely stabilized compared to the peaks experienced in the spring (COVID-19), summer (social justice protests), September (fires). In addition, as case load climbs, it also appears that online interest in the pandemic "has never been lower," based on data analyzed from Axios.

Engagement for pandemic related stories is now the lowest it has been since early March, pre-quarantine.

Sociologists think that this pandemic fatigue is likely driven by months of isolation, combined with confusing (and changing) guidelines, and a deluge of "alarmist" media coverage.

It also comes at the worst possible time given the exponential rise in cases and hospital capacity.

Topics driving coverage in/or about Oregon include:

- The Governor's statewide "Two-Week Freeze" garnered the most attention with nearly 125 million potential impressions on Twitter following wide national and local coverage. Coverage peaked on Friday, Nov. 13 and based on Cision's sentiment analysis, there was twice as much negative sentiment as positive sentiment to the announcement.

Other topics that were within this category included the Governor statement that Oregonians [could call law enforcement](#) on neighbors who knowingly violate the gathering limits and the Give the Gift of Oregon campaign.

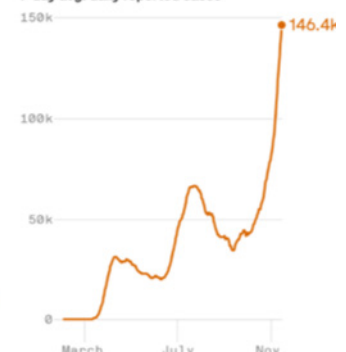
Social media interactions on stories about coronavirus and daily U.S. reported cases

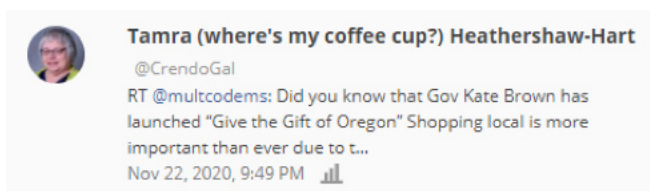
Feb. 3 to Nov. 15, 2020

Weekly social media interactions



7-day avg. daily reported cases





- Those opposed to the freeze were also widely covered on social and traditional media; two of the most socially stories (with nearly-900 shares and 600-shares respectively) were Oregonian posts about the protest against the freeze at the capitol on Saturday and the post about incoming Clackamas County Chair, Tootie Smith who gained national attention with her comments decrying the recommendation on keeping Thanksgiving gathering small.



- The impact on restaurants and small businesses has also been a hot topic and is being well documented across Oregon media showing the impact across the industry including iconic tourism industry businesses such as Willamette Valley Vineyards, Huber's and Hopworks. A sampling includes:
 - [Multiple bars and restaurants choose to shut down during the freeze](#) (KATU)
 - [Marion County restaurants frustrated by freeze](#) (Statesman Journal)
 - [Oregon wine industry frustrated by second lockdown](#) (Capital Press)
 - [Restaurants were hanging on by a thread](#) (Willamette Week)
 - [Portland's oldest restaurants reckons with pandemic pressure](#) (KOIN)
 - [Not all freezes are created equal](#) (OPB)
 - [Oregon restaurants worry about lack of economic backstop](#) (KGW)
 - [COVID-19 restrictions sideline new wine pods](#) (Portland Business Journal)
 - [Business opposition to freeze grows](#) (Mail Tribune)
- Finally coverage rounded out with more than [50 state and local leaders from rural Oregon](#) sent Gov. Brown a letter asking for flexibility in how counties can manage their COVID-19 response and ORLA and Restaurant Law Center's [lawsuit challenging the inequity of the freeze](#).

Other trending topics you may have missed:

- [25 local leaders are condemning the actions of former Don't Shoot Portland president Maria Garcia](#) — who is suing the COVID fund for Black Oregonians.
- [In America's whitest city, Black activists struggle to separate themselves from anarchists.](#)
- [Portland activists and journalists targeted in an anonymous 'hit list'.](#)
- Airport travel is expected to be the busiest since the onset of the pandemic.

Dan Diamond @ddiamond · 15h
On Thursday, the CDC called on Americans not to travel for Thanksgiving.

On Friday and Saturday, the TSA did more than 2 million screenings at airports, the highest two-day total since mid-March.

TSA checkpoint travel numbers

This page will be updated by 9 a.m. daily. ([Back to Coronavirus \(C](#)

Date	Total Traveler Throughput
11/21/2020	984,369
11/20/2020	1,019,836

565 2.8K 4.9K

Dan Diamond @ddiamond · 2h
TSA did more than 3 million screenings between Friday and Sunday, the highest three-day total since mid-March.

While travel remains significantly down from last year, it's crept back up ahead of Thanksgiving.

Full data: tsa.gov/coronavirus/pa...

Stephanie Stahl @StahlCBS3 · 45m
Airports are seeing large **crowds** throughout the country, despite warnings from CDC about Holiday travel. Do your Holiday plans involve traveling? [#COVID19](#) [#Traveling](#) [#StaySafe](#) [#Holidays](#) [#Thanksgiving](#) [#MaskUp](#) @CBSPhilly



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National Trends

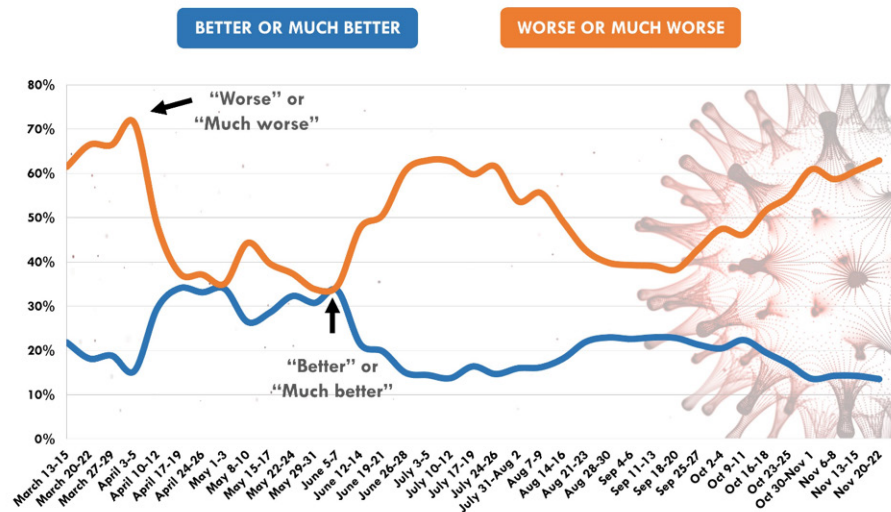
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Highlights:

- Anxiety about contracting the virus continues to rise. 62.9% feel things are going to get worse in the next month and only 13.5% feel it will get better.

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

MARCH 15 – NOVEMBER 22



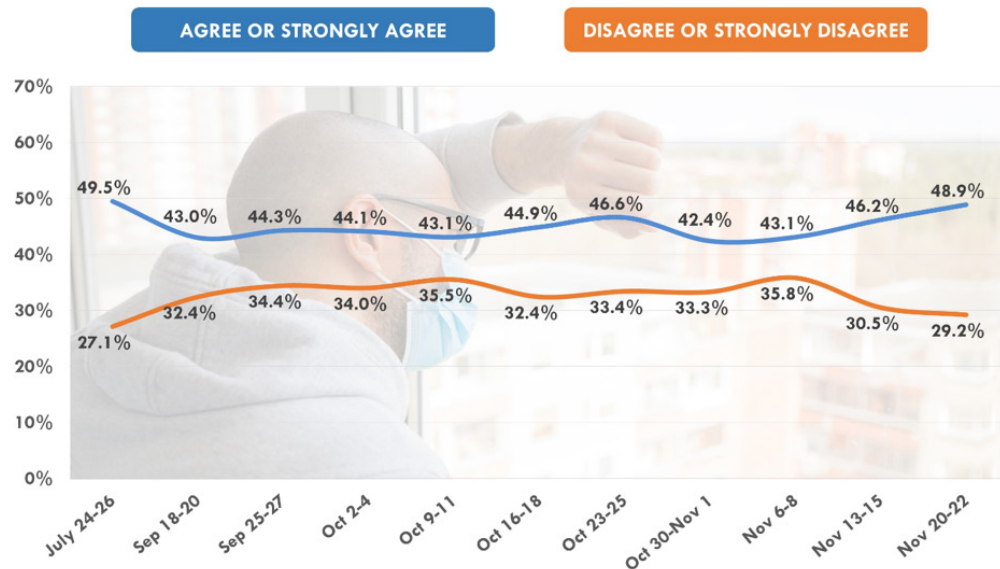
QUESTION: IN THE NEXT MONTH, HOW (IF AT ALL) DO YOU EXPECT THE SEVERITY OF THE CORONAVIRUS SITUATION IN THE UNITED STATES TO CHANGE?

IN THE NEXT MONTH THE CORONAVIRUS SITUATION WILL _____

(Base: Waves 1-37. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.)

- This continues to devastate sentiment about near-term travel and the industry's ability to inspire new, incremental trips. 61.9% of American travelers continue to agree that the current surge in cases has made them less likely to travel in the next three months. The percent of Americans who agree they have lost their interest in travel for the time being is now approaching half.

LOSS OF INTEREST IN TRAVEL JULY 24 – NOVEMBER 22



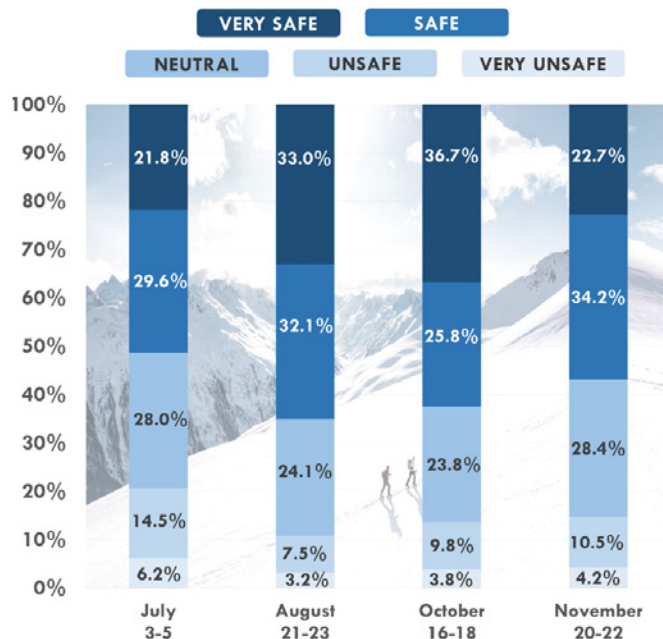
QUESTION: HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENT?
STATEMENT: I HAVE LOST MY INTEREST IN/TASTE FOR TRAVELING FOR THE TIME BEING.

(Base: Waves 20, 28-37 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.)

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- The poor course of the pandemic also appears to be affecting sentiment towards ski/snowboard travel this season. Fewer ski/snowboard travelers feel that a ski/snowboard trip is safe this 2020/2021 season than did in October. However, over two-thirds of these travelers say that the institution of pandemic protocols would make them more interested in taking a ski/snowboard trip this season.

PERCEIVED SAFETY OF A SKI/SNOWBOARD VACATION THIS SEASON AS OF NOVEMBER 22ND

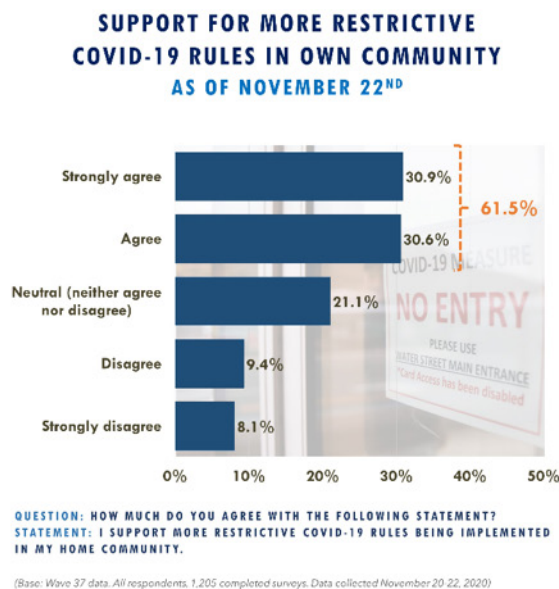
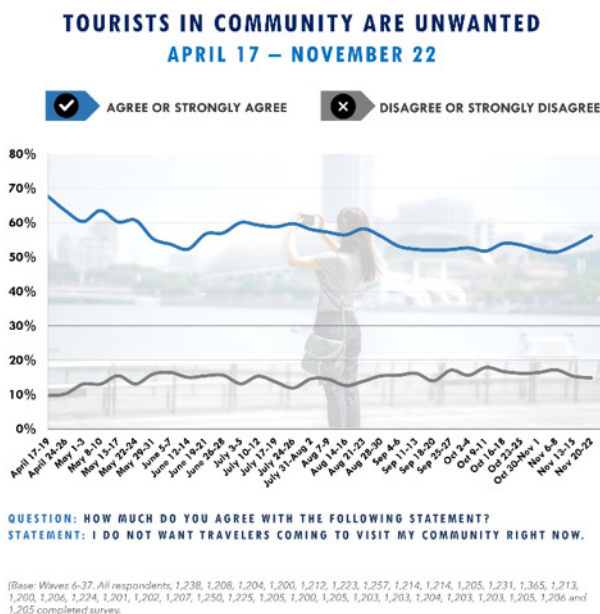


QUESTION: AT THIS MOMENT, HOW SAFE WOULD YOU FEEL TAKING A SKI/SNOWBOARD VACATION NEXT SEASON (WINTER 2020/2021)?

(Base: Waves 17, 24, 32 and 37. Respondents who are likely to take a ski/snowboard vacation this year, 206, 188, 203 and 210 completed surveys.)

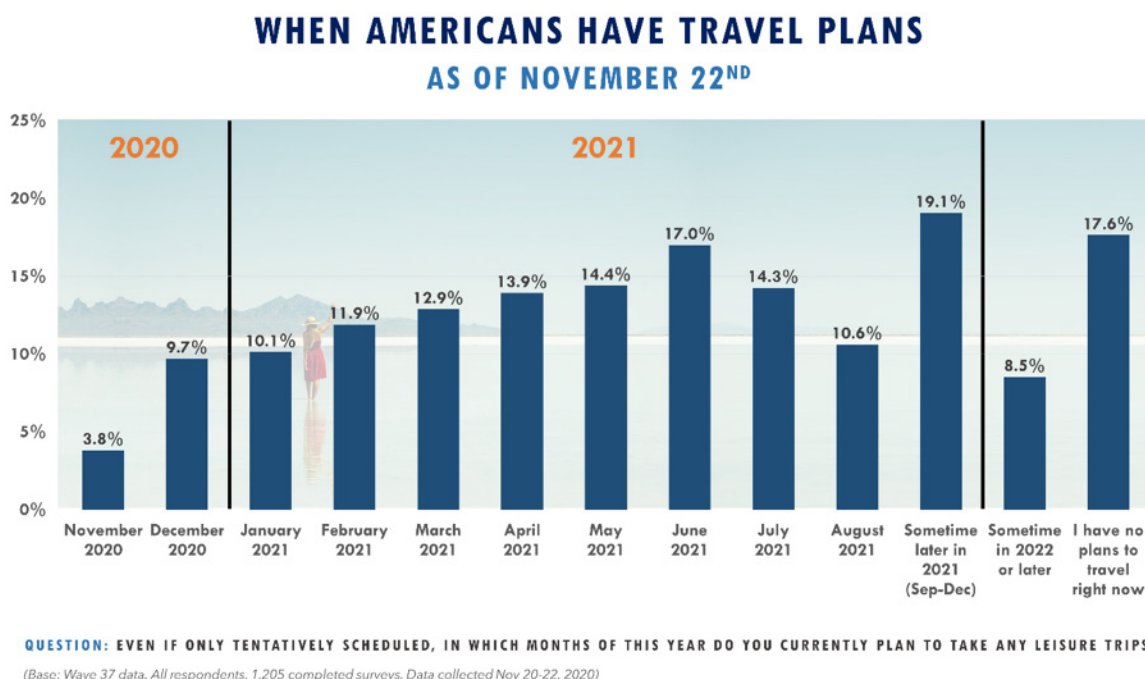
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- Nevertheless, there are indicators that the impacts of this current virus surge on travel may not be as deep or long-lasting as previous surges. The perception of travel activities as unsafe, engagement in travel avoidance overall, avoidance of international travel specifically and avoidance of conventions are still not near peaks hit in July and April.
- Looking locally, over 40% of Americans feel comfortable going out for leisure activities in their own communities. While 56.1% do not want tourists coming to their community right now, this sentiment is also not at July and April levels. Perhaps in a nod to lessons learned in previous stages of the pandemic, 61.5% agree they support more restrictive COVID-19 rules being implemented in their home community.



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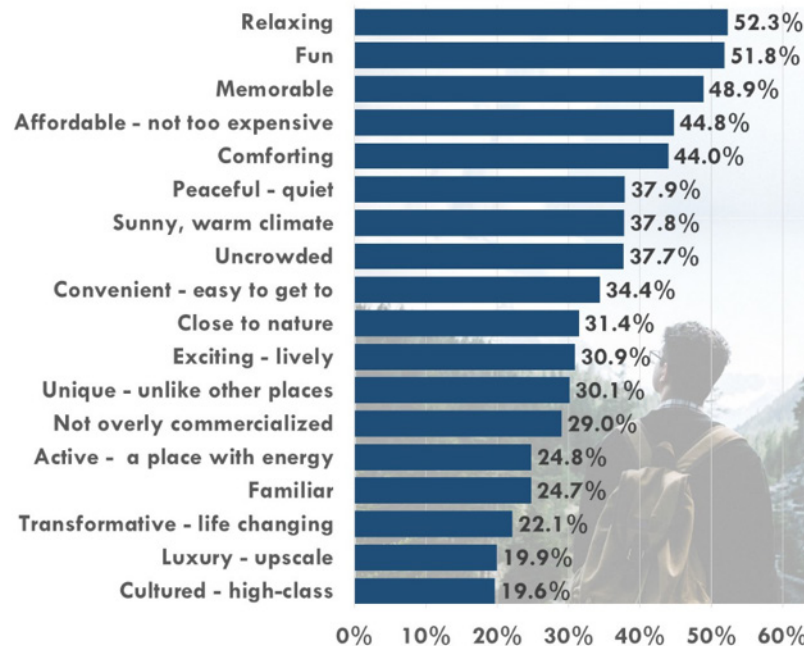
- Americans continue to report having trips planned over the next year (82%).



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- As they look to where they want to travel to over the next year, Americans are most commonly reporting that relaxing, fun, memorable, affordable and comforting are important attributes in the destinations they consider.

DESIRED TRAVEL DESTINATION ATTRIBUTES AS OF NOVEMBER 22ND



QUESTION: THINK ABOUT THE TYPES OF DESTINATIONS YOU WOULD MOST LIKE TO VISIT IN THE NEXT TWELVE (12) MONTHS.

PLEASE TELL US HOW YOU WANT THE PLACES YOU VISIT TO BE. HOW IMPORTANT IS EACH ATTRIBUTE?

(Base: Wave 37 data. All respondents, 1,205 completed surveys.
Data collected November 20-22, 2020)

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- The latest vaccine news has made 58.1% of American travelers more optimistic about life returning to normal (or near normal) in the next six months.

Tourism Economics Weekly Analysis

Analysis by Tourism Economics shows a week-by-week outlook on travel spending in the U.S. The analysis also looks at regional and state-by-state breakdowns. Findings from the November 19 report:

- Travel spending rose 4% last week—recovering about one-third of the prior week's 11% decline
 - In the week ending November 14, travel spending tallied \$11.9 billion, reflecting a 44% drop below last year's levels (a \$9.5 billion loss)
 - The y/y decline in travel spending has remained in the -41% to -46% range for 14 of the last 15 weeks
 - Likely a result of the rapid rise of COVID-19 cases in the region, the Midwest was the only region not to improve from the prior week
 - Seven of the 17 states that experienced worsening conditions in the week ending November 14 were in the Midwest, with Minnesota, Iowa and Indiana experiencing some of the largest declines of the week

- Since the beginning of March, the COVID-19 pandemic has resulted in \$463 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$59.5 billion in federal, state, and local tax revenue since March 1

Research and Analytics Resources

<https://ttra.com/resources/covid-19-travel-and-tourism-research-resources/>

<https://str.com/event/covid-19-webinar-us-canada-hotel-weekly-performance-analysis>

<https://www.mmgyglobal.com/covid-19/>

<https://www.ustravel.org/toolkit/covid-19-travel-industry-research>

<https://keydatadashboard.com/covid-19-impact-report-on-short-term-vacation-rentals-in-oregon/>

<https://covid19.ubermedia.com/>

<http://hotelnewsnow.com/data-dashboard>

If you have any questions, please direct them to: adan@traveloregon.com