

# Impact of COVID-19 on Travel Industry

October 21, 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.

## STR Weekly Data (September 4-10)

- In comparison with the same week in 2019, the Oregon hotel performance recorded the following:
  - Occupancy: -18.1% to %
  - ADR: -18.6% to US\$99.00
  - RevPAR: -33.4% to US\$58.76
- Southern Oregon has the highest occupancy for the week (80.4%).



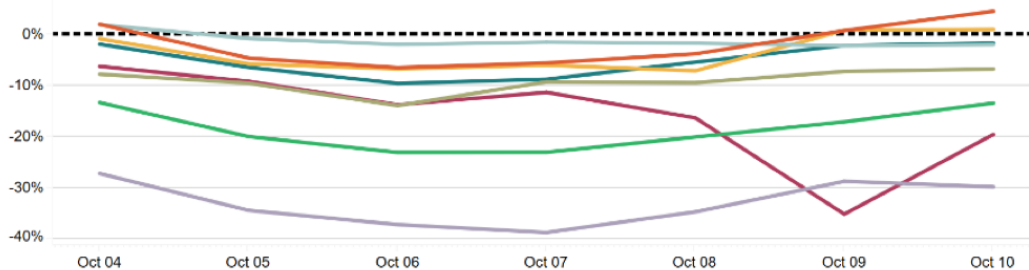
## Weekly STR Report 2020 vs 2019

(October 4 to October 10)

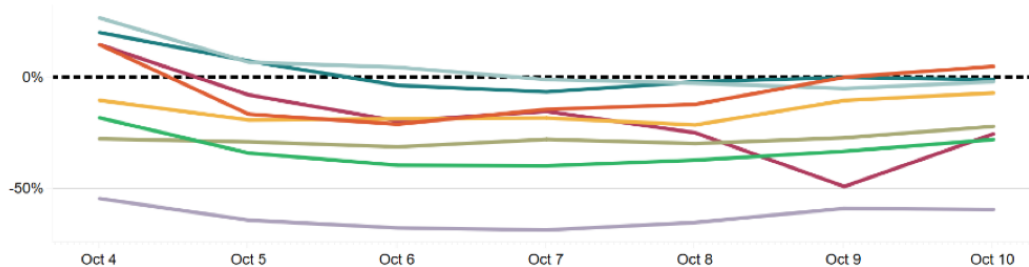
	ADR			RevPAR			Occupancy		
Oregon	\$99.00	\$121.65	-18.6%	\$58.76	\$88.17	-33.4%	59.1%	72.1%	-18.1%
Central	\$114.76	\$116.78	-1.7%	\$77.66	\$83.01	-6.4%	66.9%	70.6%	-5.2%
Coast	\$110.63	\$111.92	-1.2%	\$78.07	\$76.52	2.0%	69.7%	67.2%	3.7%
Eastern	\$81.76	\$84.67	-3.4%	\$47.54	\$55.92	-15.0%	57.9%	65.8%	-12.0%
Hood/Gorge	\$99.58	\$109.40	-9.0%	\$55.93	\$77.01	-27.4%	55.7%	69.9%	-20.4%
Portland	\$92.83	\$139.18	-33.3%	\$39.20	\$106.48	-63.2%	42.2%	76.2%	-44.6%
Southern	\$91.81	\$96.73	-5.1%	\$74.06	\$73.28	1.1%	80.4%	75.4%	6.7%
Willamette Valley	\$95.27	\$115.11	-17.2%	\$62.09	\$81.24	-23.6%	65.0%	69.0%	-5.7%

■ Oregon 
 ■ Central 
 ■ Coast 
 ■ Eastern 
 ■ Hood/Gorge 
 ■ Portland 
 ■ Southern 
 ■ Willamette ..

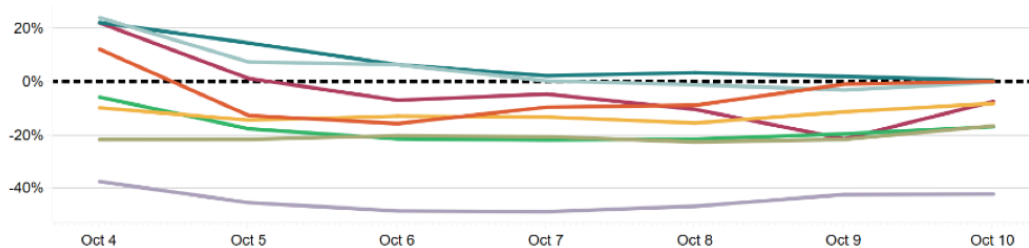
### YOY Change in ADR



### YOY Change in RevPAR



### YOY Change in Occupancy



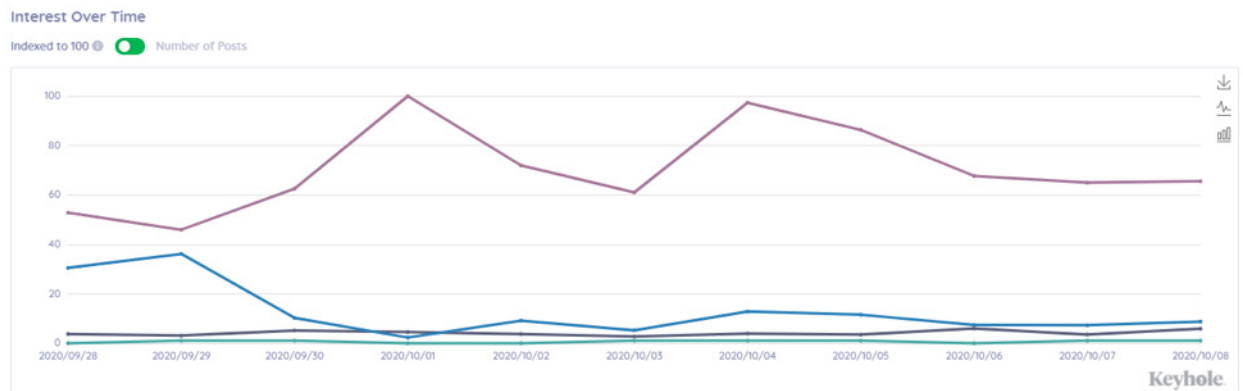
## Social Sentiment + Hot Topics (October 12)

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.

The [fall surge](#) of COVID-19 cases that many epidemiologists feared may be here.

The U.S. is reporting over 50,000 new cases of COVID-19 per day for the [first time since mid-August](#) and in Oregon, we have had [400+ cases per day](#), three of the past four days.

These past two weeks however, the spotlight was brightest on a single COVID-19 case. As expected, President Trump's announcement on Friday, Oct. 2nd that he and the First Lady tested positive for the coronavirus, his subsequent hospitalization at Walter Reed Medical Center and his release dominated all mediums for days.



### Analytics

Topic	Posts	Users	Potential Impressions
#covid-19	7.7M	7.1M	88.3B
portland	1.4M	1.3M	5.8B
#blacklivesmatter	456.7K	434.6K	6.5B
#oregonfires	1.6K	1.6K	1.9M

### Topics driving coverage in/or about Oregon include:

- Oregon reports [a new daily record](#) of COVID-19 cases.
- New [research from OHA](#) shows that 80% of survey respondents in Oregon are wearing masks "nearly all the time."

However, [the study](#) also finds that 50% still attend [social gatherings regularly](#) and that gatherings are more frequent outside the tri-county area. Specifically:

- Two-thirds of respondents (66%) report gathering together outside in a backyard, on a porch or in a park.
- More than half (52%) report getting together with friends inside a house.
- More than half (52%) report traveling more than an hour away.
- More than four in 10 Oregonians (42%) have eaten in a restaurant. Fewer than one in 10 Oregonians have attended a religious service (9%), patronized a bar or club (7%) or participated in a protest (2%).

- While the average Oregonian has gathered with others in a social setting five times over a two-week period, conservatives (7.2) and people living outside the tri-county area (7.2) reported attending more get-togethers, while liberals (4.1) and people living in the Portland metro area reported getting together fewer times (4.6) over two weeks.

On the same day the survey came out, OPB's Emily Cuerton illustrated the report by [sharing a social media post](#) from Oct. 7 of the San Simon bar in Bend where patrons were seen dancing on the bar, with hardly a mask in sight.



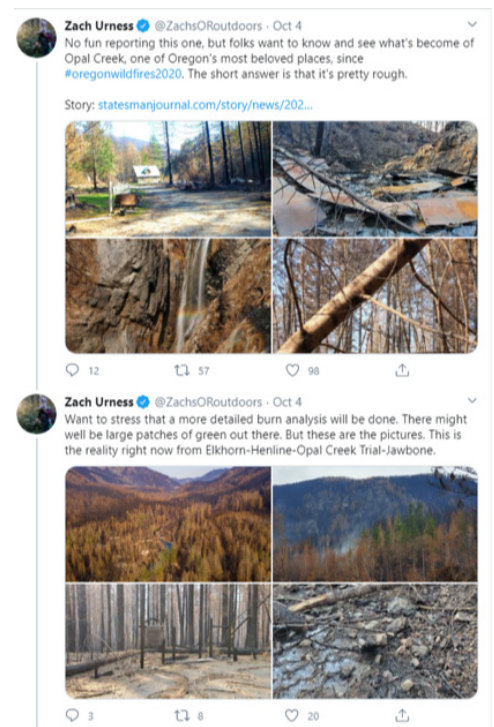
### Other COVID topics:

- Subleases spike as [pandemic takes toll](#) on downtown Portland.
- New [research from Qualtrics](#) examining 200,000 kids in 47 states from the last two weeks of September reveal that schools may not be spreaders of COVID-19. Infection rates were 0.13% and 0.24% among students and staff respectively (an [R value that's less than 1](#) is the best way to keep the spread of COVID-19 down).
- The COVID-19 recession is the most unequal in modern U.S. history, with job losses from the pandemic overwhelmingly affecting low-wage, minority workers the most. according to a [Washington Post](#) analysis.
- Remote U.S. destinations, where social distancing is easier, are [generally faring better than cities](#), which are trying hard to get a bigger share of leisure travel.
- Portland Monthly just published a [deep dive into the rise and fall of Kah-Nee-Ta](#) resort that examines the structural problems facing the Warm Springs tribe that makes a revival of the resort challenging.

### #OregonFires

Social conversation and coverage declined exponentially given the containment level of fires. Most of the current conversations are happening under the #OregonRising and #OregonFires2020 hashtags and consist mostly of agencies sharing recovery and assistance programs and media sharing impacts of the fire. Wide shared content includes:

- [Oregon road repair and safety issues](#) will linger long after the fires are out via OPB.
- Impact of fires to the [Opal Creek Wilderness and Recreation Area](#).
- [Disaster relief help from FEMA](#).



## Social Justice Protests:

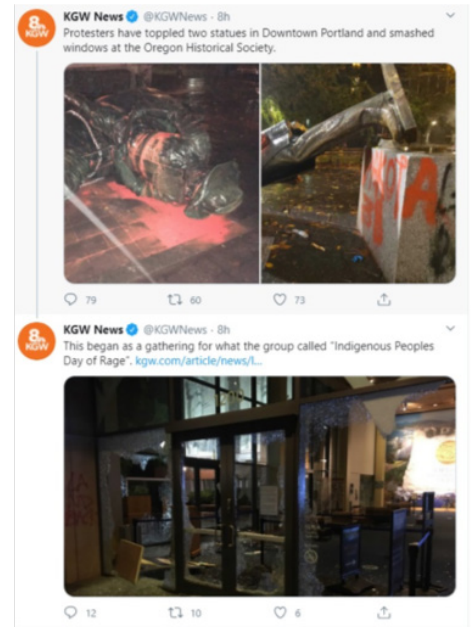
In the last two weeks, the following events generated the most buzz:

- On Sunday, Oct. 4, tensions flared between pro-Trump counter-protesters and social justice protesters at Bend's Pilot Butte Neighborhood Park and [erupted into a brawl and tense standoff](#) with Bend Police.
- On Sunday, Oct. 11, [protesters toppled statues](#) of Teddy Roosevelt, Abe Lincoln, and smashed windows and doors of the Oregon Historical Society. The action drew [swift attention](#) from President Trump.

## Other Trends:

- [Print guidebooks are not dead yet](#). "Maps and atlases sold well, as did guides on parks, campgrounds, hiking, ecotourism and family travel this year."
- [MyCOVIDRisk](#), a new app from Brown University's Center for Digital Health gives users their risk for contracting COVID-19 based on location and type of activity.
- [New reporting from Axios](#) is shedding new light into how the generational divide between Facebook and Instagram users drives content performance and trends on each platform.

Facebook is hardwired for news and link shares while Instagram favors hashtags and images. This difference helps explain why progressive messages such as "Black Lives Matter" and "Climate change" generate more engagement on Instagram.



## National and International Trends

### Destination Analysts

#### Key Findings:

- High concerns among American travelers' about contracting the coronavirus and its impact on personal finances and the national economy rose this week, as numbers of cases soared across the U.S. Pessimism about the course the virus will take in the U.S is now clearly on a renewed growth path.
- While these darkening feelings did not meaningfully impact safety perceptions about travel, they did adversely affect both travel readiness and trip plans.
- It appears that nearly 25% fewer Americans will be traveling to celebrate the holidays this year. The majority of those not traveling have a pandemic related reason for not doing so.
- Those who will travel during the holidays are planning on taking 2.4 trips on average, with 35.4% saying they will travel by air. However, 27.8% plan to decrease their spending on these holiday trips relative to last year. Over one-third (34.8%) plan to test themselves for COVID-19 prior to their trips.
- Nearly 40% of convention travelers say they have plans to attend a convention/group meeting event in the next year. The percent of convention travelers who report they would be happy if asked to attend such a meeting in the next six months has grown to 49.7% from 40.8% in June. Trust in both the conference organizers to institute protocols that look out for attendees' health and fellow attendees to behave appropriately as not to spread COVID-19 has also grown significantly.
- It is important for the travel industry to be realistic about the threat that virtual meetings pose to the volume and economic impact of this type of travel in the future. While 60% of American travelers say they prefer or strongly prefer in-person to virtual conventions/conferences, one-in-five feel neutral—fine to go either way—and another 20% say they prefer virtual.

## **Tourism Economics weekly outlook on travel spending in the U.S.**

This analysis looks at regional and state-by-state breakdowns. Findings from the October 15 report:

- Travel spending growth slowed to 2% last week following its 5% expansion the prior week
  - In the week ending October 10, travel spending rose to \$13.1 billion—the highest level seen from a non-national holiday week since the beginning of the pandemic
    - Travel spending losses are currently on par with September, which would result in approximately \$41 billion in losses for the entire month of October
  - Travel spending measured 41% below last year's levels (a \$9.1 billion loss), a slight improvement from the 42% drop in the prior week
  - Since the beginning of March, the COVID-19 pandemic has resulted in \$415 billion in cumulative losses for the U.S. travel economy
    - Hawaii, D.C., New York, Massachusetts and Illinois continue to experience losses exceeding 50%
    - Most states experienced moderate gains or slight losses. Mountainous states with many outdoor activity options experienced notable gains, including South Dakota, Montana, Idaho, North Dakota, Wyoming, Utah and Colorado
  - The continual depressed level of travel spending has caused a loss of \$53.3 billion in federal, state, and local tax revenue since March 1

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### **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>

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