

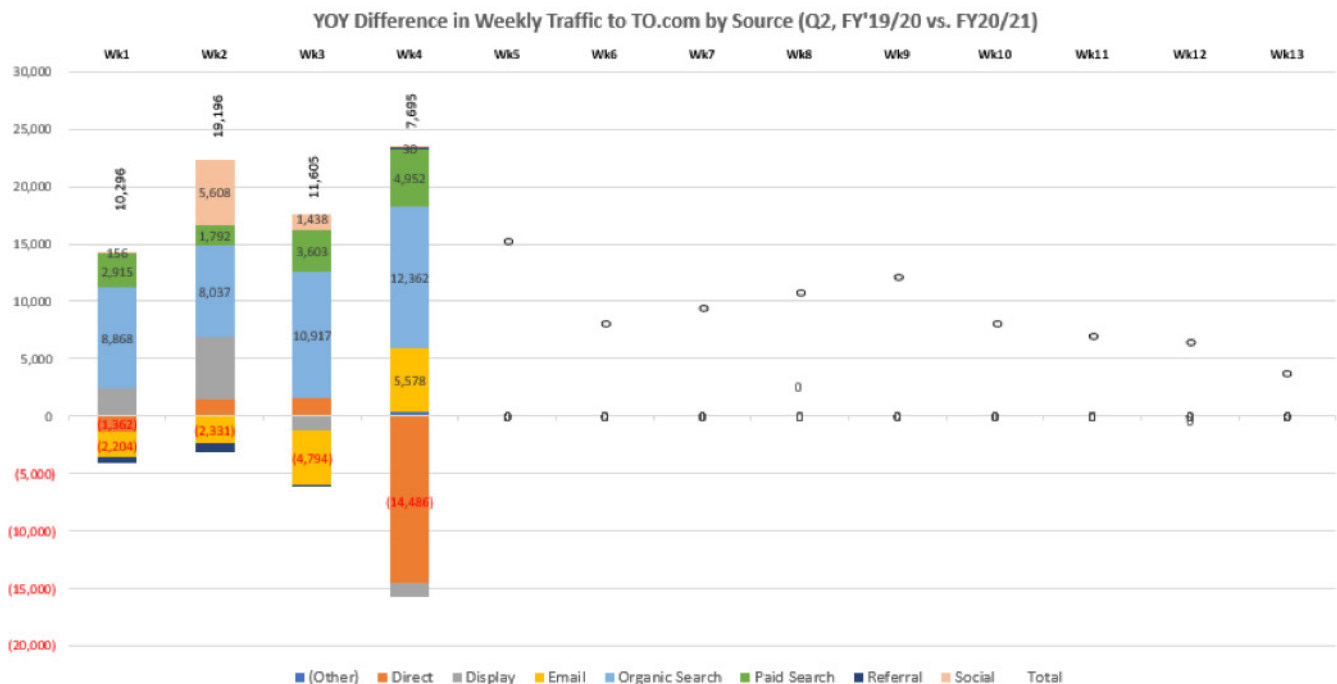
Impact of COVID-19 on Travel Industry

October 28, 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.

Weekly Traffic to TO.com

- Week 4 of Q2 2021 showed an 8% increase in traffic YOY or 7695 visitors. Most of this week's gain came from organic search and email.
 - We are now competing with the launch of last year's Yeti and Squatch campaign which is driving down our YOY numbers due to the popularity of that campaign.
 - Additionally, last year on 10/21, we had a spike in bot traffic. You can see the YOY change represented below in the direct traffic in week 4.
- We haven't yet recovered from the loss in organic search traffic that we experience after the Labor Day fires. We've leveled off to organic search levels that we were seeing back in April and May.
- Outside of Travel Oregon: The Game, the top content for the past 4 weeks continues to be our travel alerts. Although the covid-19 resources page is now in second places boosted by the launch of our Fall 20 campaign. We also got a lot of traction from our guide to fall foliage story that ran last week in our newsletter. We also seen a rise in traffic to our road ready sweepstakes landing page.
- Fall 2020 Safe Travel campaign continues to promote awareness around how to travel safely in Oregon given CV-19.
 - This week the campaign traffic made 13% of total traffic to TO.com
- Week over Week (WOW): Our week 2 WOW results were up 8% after being down -5% last week.

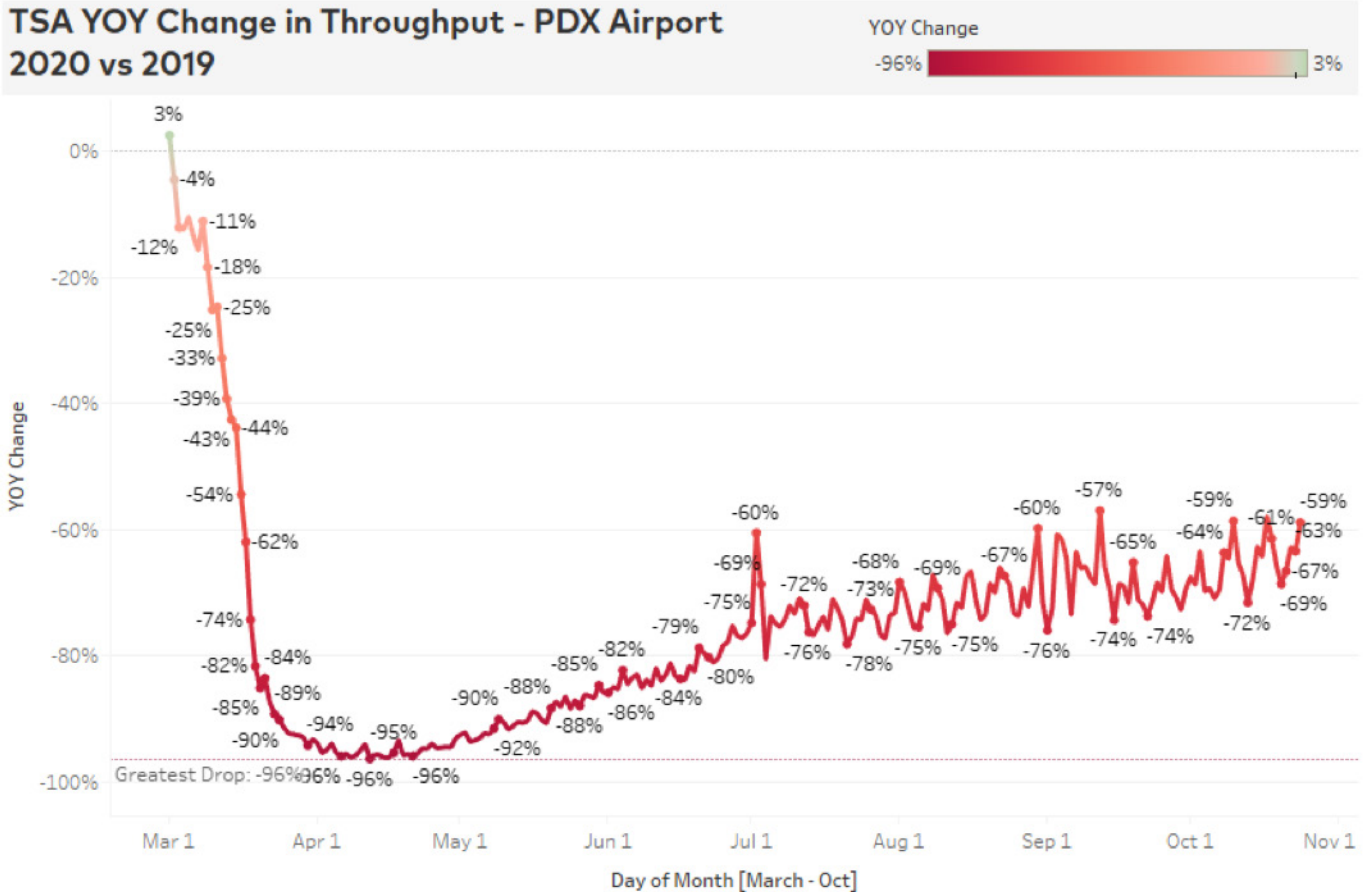


SOURCE: Google Analytics

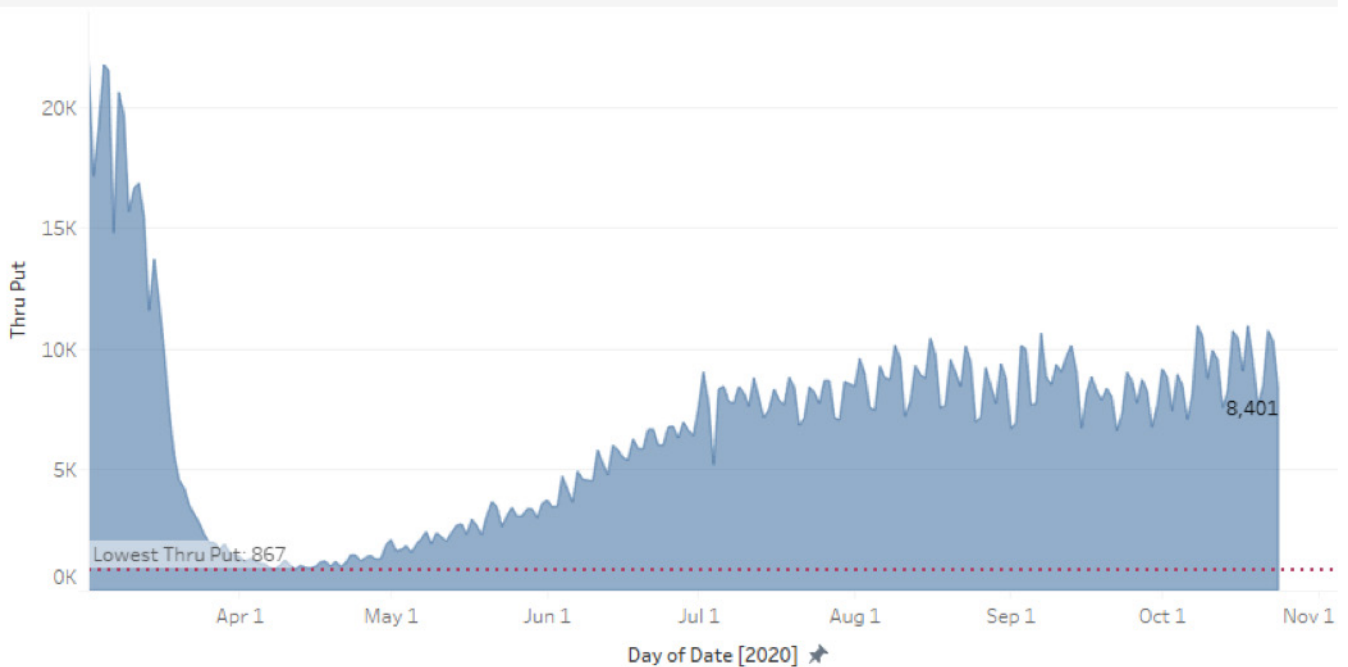
PDX Airport Data

The TSA reported 8,401 passengers utilized the checkpoints on Saturday, a decrease of 667 over the previous Saturday. On October 18th, PDX saw their second highest throughput since the start of the pandemic at 10,965, only 1 passenger short of match the previous record. Throughput continues its level trend since the start of July. However, YOY change in throughput continues to climb very steadily.

TSA YOY Change in Throughput - PDX Airport 2020 vs 2019



2020 Thru Put - PDX



STR Monthly Data (Month of September)

- In comparison with the same month in 2019, the Oregon hotel performance recorded the following:
 - o Occupancy: -16.2% to 62.2%
 - Improvement from August, which was -29.6% to 56.7%
 - o ADR (Room rate): -17.9% to US\$106.76
 - YOY performance was an improvement vs. August (- 19.1%), however September experienced a seasonal 9% decrease in average room rate vs. August (US\$117.23)
 - o RevPAR: -31.2% to US\$66.17 (August was -43.1% to US\$76.48)
- Oregon continues to outperform the US and Pacific NW.

OREGON LODGING STATISTICS												
September 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	(28.2)	99.12	(24.9)	47.87	(46.1)	156,739,380	(2.5)	75,690,778	(30.0)	7,502,352,943	(47.4)
Pacific	53.7	(29.7)	121.52	(28.5)	65.24	(49.7)	21,587,310	(7.2)	11,589,019	(34.7)	1,408,323,478	(53.4)
Statewide	62.0	(16.2)	106.76	(17.9)	66.17	(31.2)	1,979,400	(2.9)	1,226,810	(18.6)	130,978,752	(33.2)
Eastern	56.9	(16.5)	85.33	(14.2)	48.55	(28.4)	141,900	0.0	80,730	(16.5)	6,888,958	(28.4)
Central	63.7	(16.4)	127.69	(2.8)	81.30	(18.8)	173,400	2.8	110,409	(14.1)	14,097,598	(16.5)
Southern	76.1	6.0	94.29	(5.7)	71.73	(0.1)	258,180	0.0	196,391	6.0	18,518,475	(0.1)
Willamette Valley	71.8	1.7	99.66	(14.9)	71.51	(13.5)	320,850	0.3	230,231	2.0	22,945,516	(13.2)
Mt Hood/Gorge	61.2	(18.3)	112.13	(12.6)	68.61	(28.6)	69,150	4.2	42,309	(14.9)	4,744,315	(25.6)
Portland Metro	47.9	(38.3)	95.48	(34.6)	45.76	(59.7)	682,020	(9.1)	326,865	(43.9)	31,209,655	(63.3)
Coast	72.6	0.7	132.21	2.4	95.94	3.2	330,000	0.1	239,468	0.9	31,658,939	3.3

Source: STR

STR Weekly Data (October 11 to October 17)



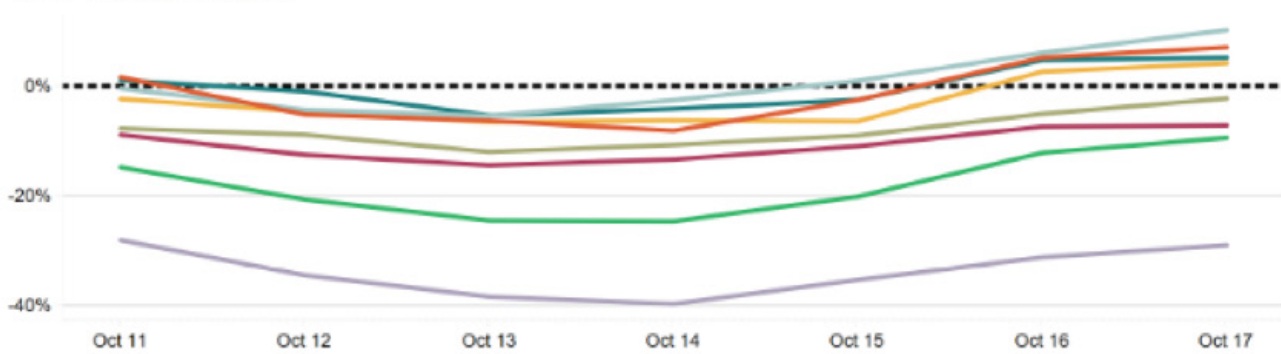
Weekly STR Report 2020 vs 2019

(October 11 to October 17)

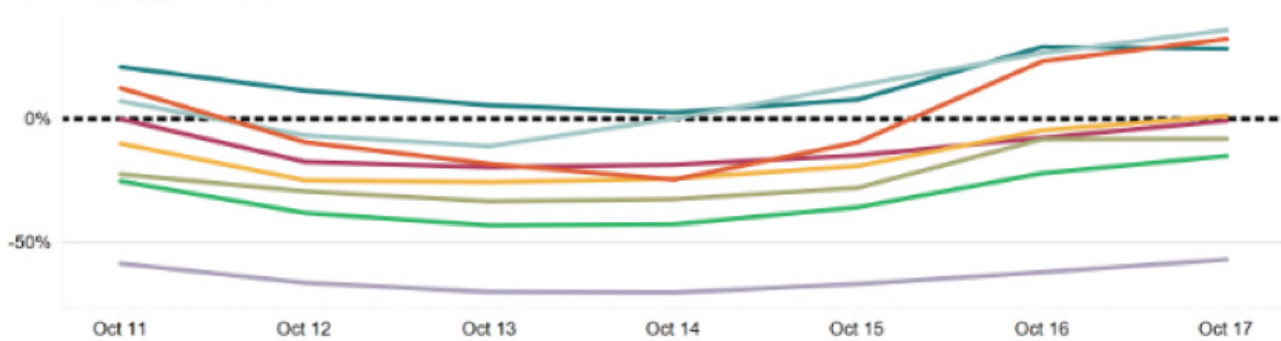
	ADR			RevPAR			Occupancy		
Oregon	\$97.70	\$119.23	-18.1%	\$56.50	\$82.38	-31.4%	57.5%	68.9%	-16.6%
Central	\$112.99	\$114.00	-0.9%	\$73.95	\$73.17	1.1%	64.7%	64.0%	1.1%
Coast	\$107.87	\$106.66	1.1%	\$72.32	\$64.73	11.7%	65.8%	60.4%	9.0%
Eastern	\$81.64	\$83.78	-2.6%	\$46.34	\$54.60	-15.1%	56.5%	65.0%	-13.1%
Hood/Gorge	\$97.69	\$105.70	-7.6%	\$56.48	\$72.13	-21.7%	57.0%	68.0%	-16.1%
Portland	\$92.75	\$140.58	-34.0%	\$38.88	\$108.94	-64.3%	41.9%	77.2%	-45.8%
Southern	\$91.90	\$91.98	-0.1%	\$73.91	\$64.18	15.1%	80.3%	69.7%	15.2%
Willamette Valley	\$92.35	\$103.20	-10.5%	\$57.01	\$63.99	-10.9%	61.5%	61.9%	-0.6%

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

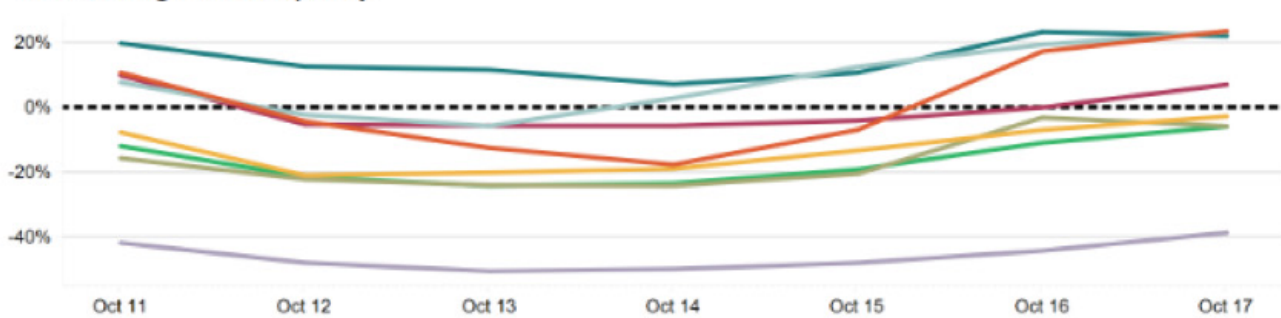
YOY Change in ADR



YOY Change in RevPAR



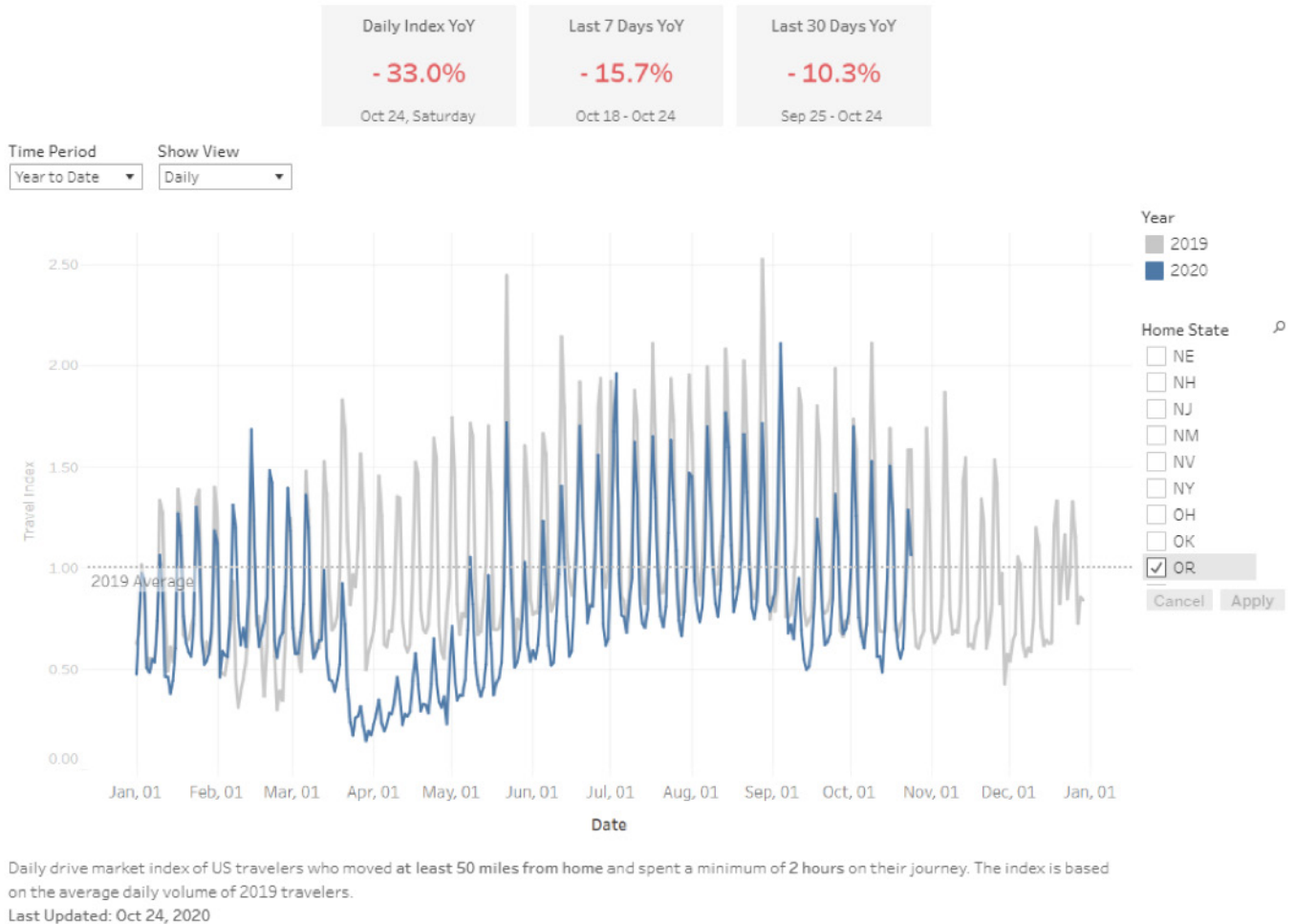
YOY Change in Occupancy



Arrivalist

- Over the past month, Arrivalist data indicates that Oregon has seen a 10.3% drop in travel to Oregon. For the month, we're lagging behind the US, which had 7.4% drop. See the following for the Oregon data.

Arrivalist US Daily Travel Index

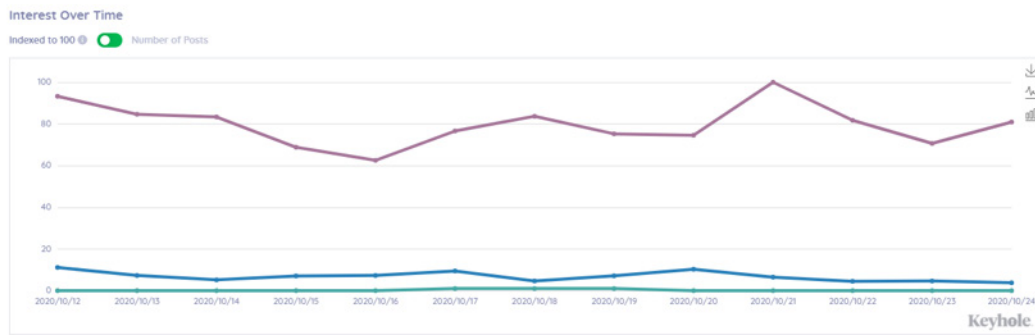


Social Sentiment + Hot Topics

The seven-day average of new cases nationwide hit 68,767 on Sunday (Oct. 25), topping the previous peak of 67,293 reported on July 22.

47 states (including Oregon) are now classified as either "trending poorly" or having "uncontrolled spread" by [public health experts](#). Nationally, the two highest single days of new cases were Friday and Saturday, with more than 83,000 new cases added each day. In Oregon, OHA reported 550 new cases on Friday, the highest daily case count since the beginning of the pandemic.

Not surprisingly, COVID-19 is the leading topic of discussion among the topics we are tracking.



Analytics

Topic	Posts	Users	Potential Impressions
#covid-19	7.4M	6.7M	99.0B
portland	636.1K	598.3K	7.5B
#oregonfires	400	400	538.3K

Topics driving coverage in/or about Oregon include:

- [Record-setting case counts](#) and new projections showing [cases skyrocketing, unless Oregonians "don't change their ways fast."](#)
- Idaho hospitals' potential plan to [send patients to Portland](#) due to capacity limits.
- With the number of facilities with one or more cases at its peak, the coronavirus continues to [hound Oregon's senior living facilities](#).
- Governor Brown [reviews school reopening metrics](#) as pressure from [parent groups](#), [school boards](#) and [pediatricians](#) increase.
- With federal stimulus legislation stalled, [CC Slaughters](#), the iconic LGBTQ club in Portland, became the latest victim of the pandemic. The impact of the pandemic on Oregon's restaurant scene continues to be dire and this [Eater story is tracking all of the closures](#).
- The disproportionate impact of the pandemic on women in the workforce have been widely documented in local media. Both [KGW](#) and [OregonLive](#) brought the September jobs report—that showed that more than 865,000 women dropped out of the labor force—to life using personal stories from the area.

Other COVID + travel topics:

- A new study by Boeing, United Airlines and the Department of Defense shows that the risk of COVID-19 exposure onboard an aircraft is "[virtually non-existent](#)."
- From empty piazzas and bike lanes to uncrowded attractions and quiet parks, [how tourist hotspots such as London, Rome and New York have changed during the pandemic](#).
- Longer, infrequent trips, immersive experiences and more time outdoors - how the pandemic has [forever changed the way we travel](#) (Travel + Leisure).
- Despite being one of the densest cities in the world, how San Francisco became a [COVID-19 success story](#) while other cities stumbled (LA Times).
- Jane Goodall's advice on how to [evolve tourism in a post-pandemic world](#) (hint: "One of the things to avoid is more people - the secret is tourism that is controlled. The number of people that are allowed in, and how long they can stay, and that is tough, but it has to be.")

#OregonFires

Social conversations on the fire have dwindled; most of the tracked conversations were informational links from agencies such as FEMA and OEM pertaining to services for impacted communities such as unemployment, housing, and disaster relief.

Portland and Social Justice Protests:

Social justice protests in Portland have continued for 132 days as of this past weekend. The following events/stories have generated the most buzz in the past two weeks:

- A crisis mapping group named [Oregon as one of five states](#) in greatest risk from increased militia activity around the November 3 elections. This comes as the FBI foiled a plot against Michigan Governor Whitmer and [Portland agencies prepare](#) for post-election violence.
- Clashed have continued between protesters and federal law enforcement outside the [ICE facility](#), a frequent destination for protests in SW Portland. The protests have led to deployment of tear gas, arrests and a widely shared and commented photo by [Nathan Howard](#) that perfectly depicts the reality of life in Portland.
- The photo shows a woman (with a mask on) leaving her condo while a protester is being detained. was widely shared and commented on for its perfect distillation of life in Portland.



nathanhowardphoto • Follow
Portland, Oregon

nathanhowardphoto A woman walks past a standoff between federal officers and a protester during a march on the ICE detention facility in Portland, Oregon on Oct. 17, 2020.

#portlandprotest #pdxprotest
#portland #pdx #onassignment
#documentaryphotography
#photojournalism
#documentaryphotography

Liked by [redacted] and 1,408 others
7 DAYS AGO

Add a comment... Post

- There was a rally supporting groups that [working towards racial justice](#) in Lake Oswego, this past weekend (Oct. 25); despite the presence of counter protesting Proud Boys and a few verbal altercations, the rally was peaceful and lent solidarity to the "Respond to Racism in Lake Oswego" social justice efforts in the Portland suburb.
- Activists also encouraged folks to vote and [celebrated first time voters](#) with drum rolls and dancing!
- Environmental groups including the ACLU, Willamette Riverkeeper and Cascadia Wildlands have [filed a lawsuit against DHS](#) for violating the National Environmental Policy Act by "failing to analyze the potentially severe human health and environmental impacts of tear gas before it was deployed."
- Finally, Portland joined Seattle and New York in a lawsuit against the Trump Administration's designation of the city as an ["anarchist jurisdiction."](#)

2lesslegs
@2lesslegs

How we vote in Portland Oregon ❤️

#BLACKLIVESMATTER 🍌

45.1K views Send Message 0:09 / 0:30

8:54 AM · Oct 24, 2020 · Twitter for iPhone

National Trends

Destination Analysts

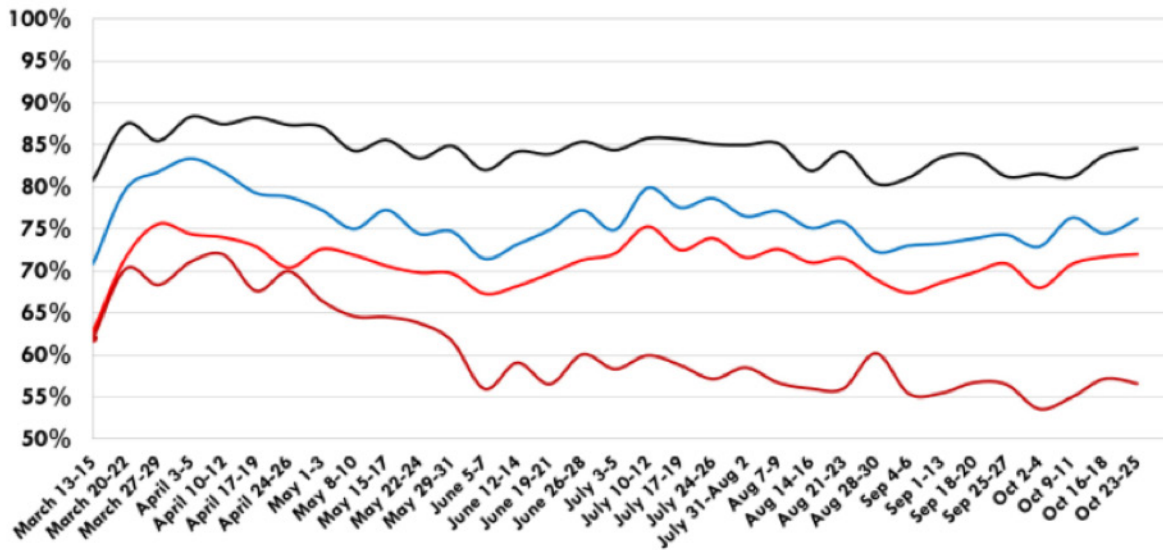
Highlights:

- As new infection records continued to be set in the U.S., Americans' strong concerns about virus contraction and the pandemic's impact on personal finances and the greater economy marched upwards again this week. Pessimism about the virus' course in the U.S. is firmly back in a heightened period.

NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT AS OF OCTOBER 25TH



(% ANSWERING 10-6 ON 11-POINT SCALE)



QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE/YOUR _____ ?

(Base: Waves 1-33. 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 and 1,203 completed surveys.)



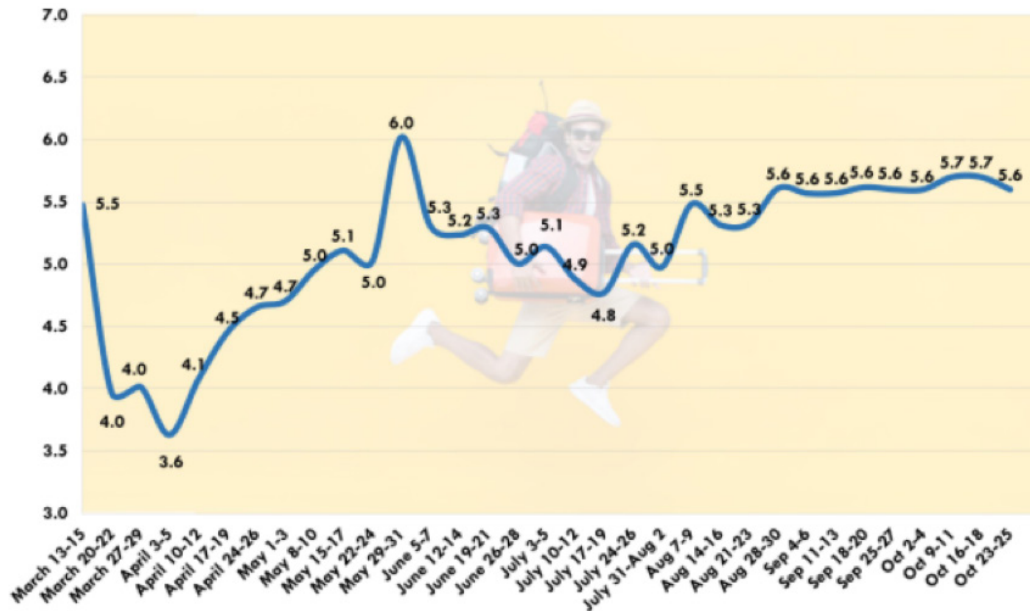
- The increased anxiety about the virus coincides with decreasing excitement levels about taking a getaway in the next month and openness to travel inspiration.

EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13 – OCTOBER 25



EXCITED TO TRAVEL RIGHT NOW
(AVERAGE SCORE ON AN 11-POINT SCALE)



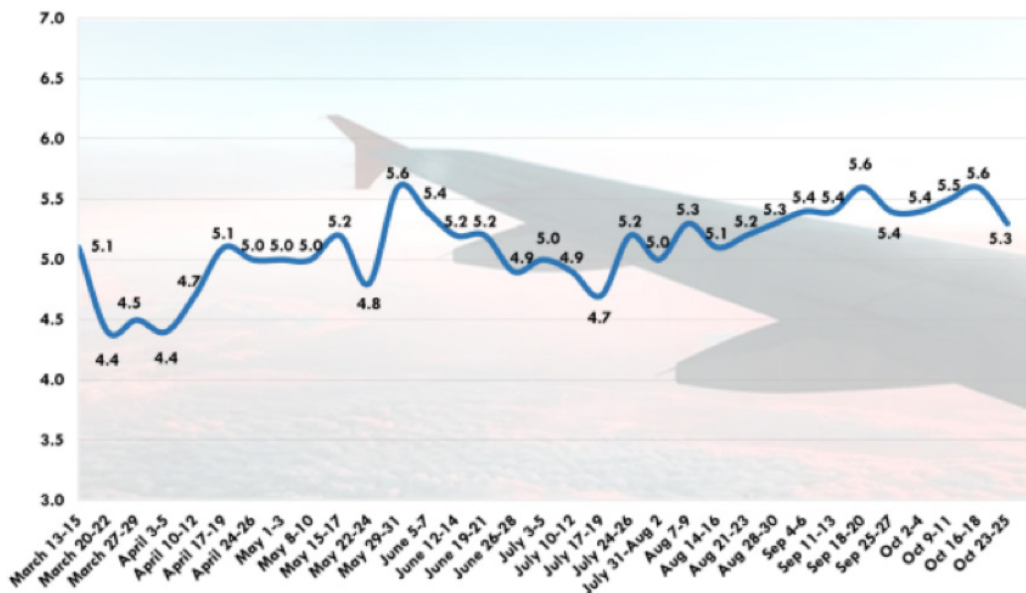
QUESTION: IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – OCTOBER 25



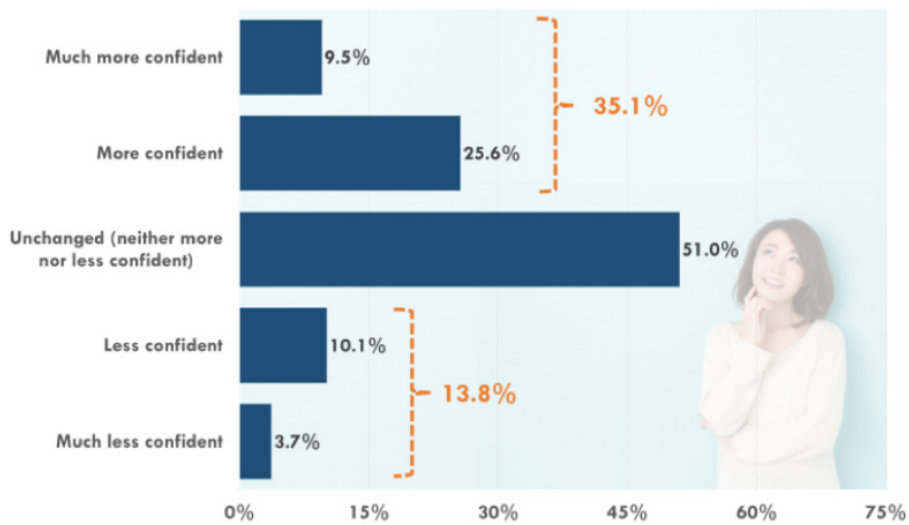
OPEN TO TRAVEL INSPIRATION
(AVERAGE SCORE ON AN 11-POINT SCALE)



QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

- Perceptions of travel activities as unsafe and the percent of Americans who agree they have lost their taste for travel for the time being ticked up this week.

CONFIDENCE IN NAVIGATING THE CORONAVIRUS SITUATION AS OF OCTOBER 25TH



QUESTION: OVER THE PAST THREE (3) MONTHS, HAS YOUR CONFIDENCE THAT YOU CAN NAVIGATE THE CORONAVIRUS SITUATION SAFELY CHANGED? (SELECT ONE TO COMPLETE THE SENTENCE)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



- However, there are signs that travel may not be as significantly impacted as it was in previous surges during the pandemic. 35.1% of American travelers feel they have gained confidence in how to navigate the pandemic in the last three months. Americans are now actually exhibiting less agreement that they will avoid travel until the coronavirus situation is more resolved and their state of mind about travel readiness remained constant from last week.
- Three-quarters still have trips at least tentatively planned, and the joy travel brings remains ingrained. Nearly 60% of Americans agree that having a vacation scheduled in the next six months would make them feel there is something happy to look forward to.

HAPPINESS WITH SCHEDULING A VACATION IN NEXT 6 MONTHS AS OF OCTOBER 25TH

AGREE OR STRONGLY AGREE



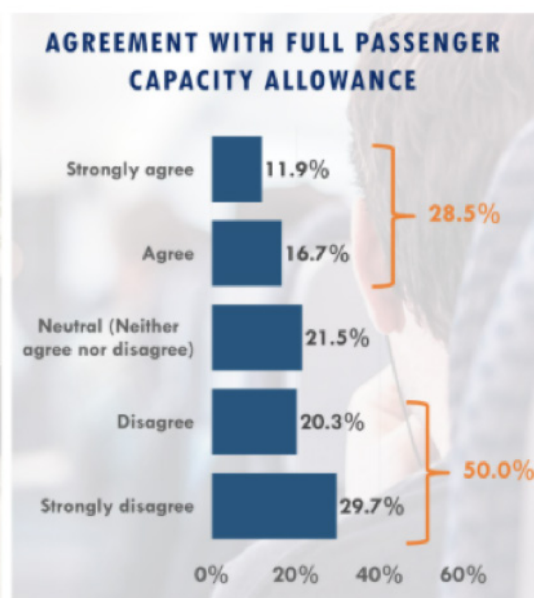
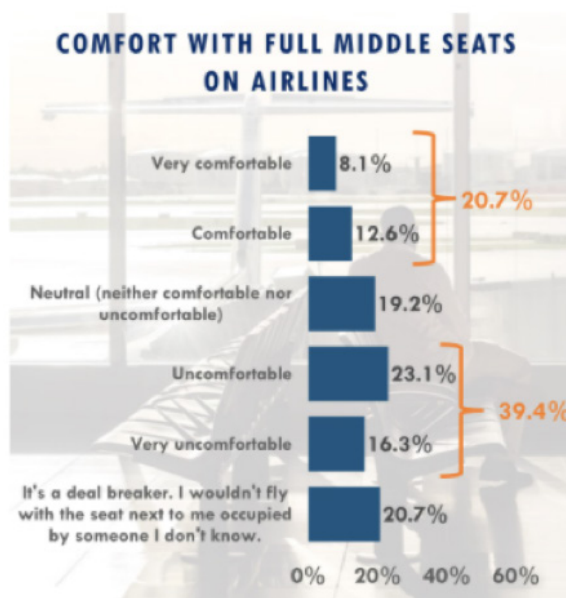
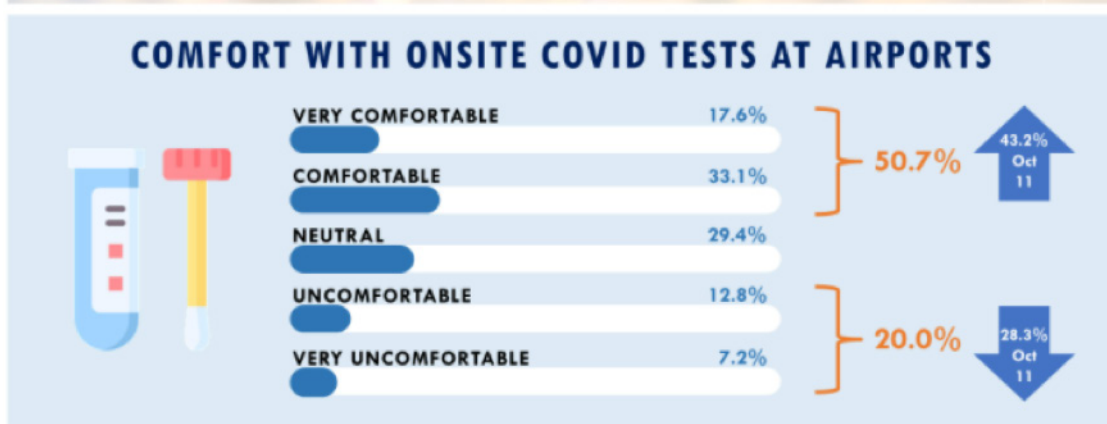
QUESTION: HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENT?
STATEMENT: HAVING A VACATION SCHEDULED IN THE NEXT SIX MONTHS WOULD MAKE ME FEEL THERE IS SOMETHING HAPPY TO LOOK FORWARD TO.

(Base: Waves 22-33. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)



- Air travel also looks to continue a measured recovery. Over 35% plan to travel by air in the next 6 months.
- Examining policies that may bring more Americans back to air travel sooner, comfort with airlines requiring a COVID-19 test prior to boarding increased to 50.7% from 43.2% just two weeks ago. However, social distancing continues to be important to a significant share of Americans when it comes to air travel.

AMERICANS' CURRENT FEELINGS ABOUT AIR TRAVEL



COVID-19 Harris Poll, October 18, 2020

- COVID-19 lockdowns have given consumers a renewed appreciation for the outdoors
 - 69% of Americans say they have an increased appreciation of the experience and awareness of their surroundings when they are outside
- Even with winter approaching, Americans are turning to the outdoors for safety, sanity and entertainment
 - Three in 10 (29%) say they will continue to adjust to outdoor socialization during the winter months
- With high interest in nearly all outdoor activities, consumers are more receptive to outdoor advertising
 - Just under half (45%) say they are noticing outdoor advertising (billboards, outdoor video screens, posters, and signage) more than before the pandemic and 38% say they find these ads useful because they provide them with information on COVID safety and hygiene
- At the same time, indoor advertising is less noticed and two-thirds (68%) of Americans say they have been spending so much time looking at screens that they tune out digital online ads

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: ladan@traveloregon.com