

Impact of COVID-19 on Travel Industry

May 12, 2020

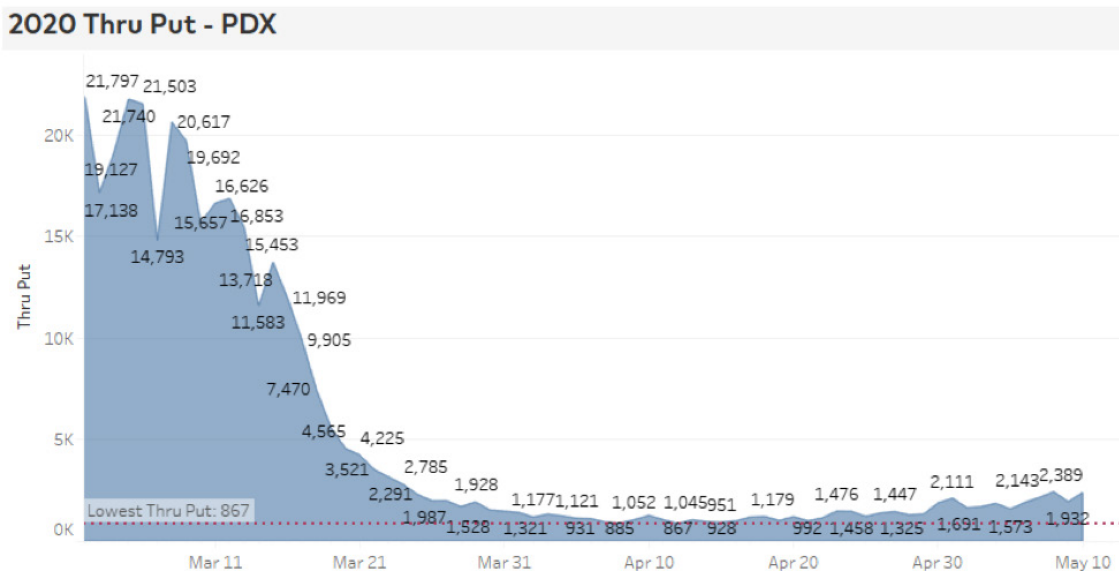
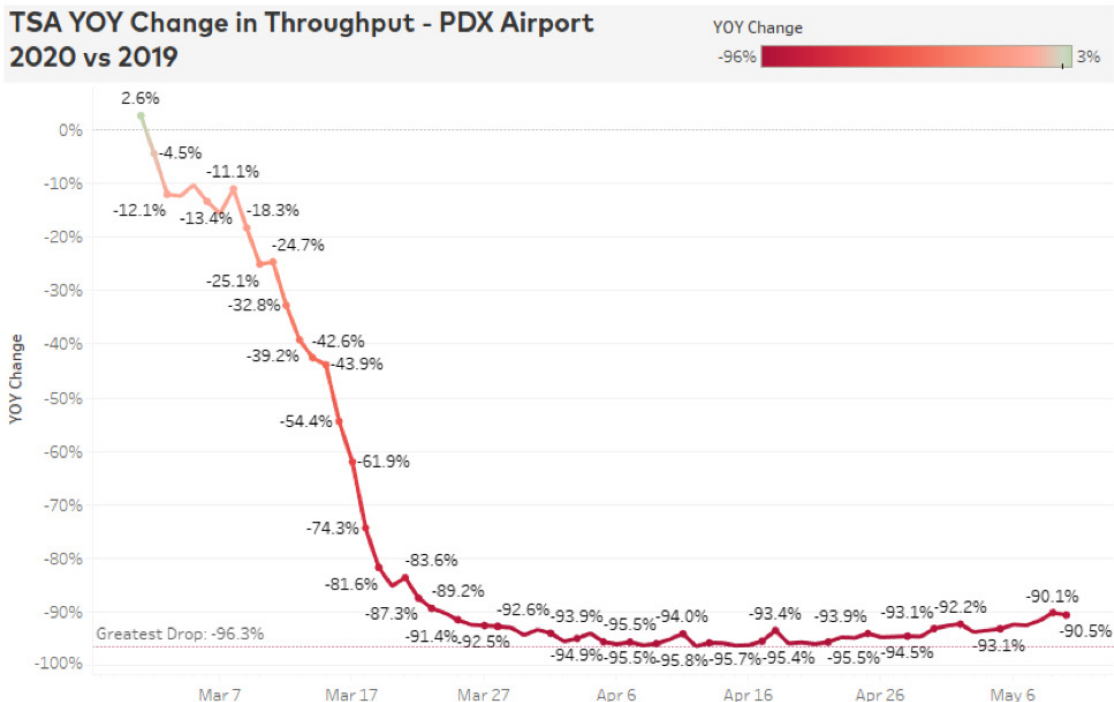
To help share information about COVID-19 impacts to the travel industry, Travel Oregon's research team is compiling state and national data on a weekly basis to share with external partners. The data below is this week's summary and is for informational purposes only.

The Oregon COVID-19 Business Impacts Survey Results:

- View the [Executive Summary](#)
- View [Survey Results](#)

PDX Airport Data

May 10th, the PDX passenger throughput was 22,694 passengers below (90.5%) the same day, last year. Month to date, May 2020, passenger throughput is 232,993 (92.2%) below last year. We're starting to see trips return as the thru-put trend upwards. This data is provided by Port of Portland.



The chart below shows the year over year (YOY) change in Average Daily Rate (ADR), Revenue Per Available Room (RevPAR), and Occupancy statewide and per region in Oregon. This data is provided by STR, Inc.

Region
All

(April 26 to May 2)

| | ADR | | | RevPAR | | | Occupancy | | |
|-------------------|---------|----------|--------|---------|----------|--------|-----------|-------|--------|
| Oregon | \$79.21 | \$120.34 | -34.2% | \$21.98 | \$80.53 | -72.7% | 27.7% | 66.5% | -57.8% |
| Central | \$86.27 | \$112.20 | -23.1% | \$21.03 | \$77.33 | -72.8% | 24.4% | 68.4% | -64.1% |
| Coast | \$77.72 | \$111.37 | -30.2% | \$18.53 | \$66.09 | -72.0% | 23.8% | 57.5% | -56.5% |
| Eastern | \$72.71 | \$81.59 | -10.9% | \$26.73 | \$49.35 | -45.8% | 36.7% | 60.2% | -38.4% |
| Hood/Gorge | \$79.25 | \$103.49 | -23.4% | \$26.03 | \$72.43 | -64.1% | 32.8% | 69.3% | -52.0% |
| Portland | \$85.48 | \$139.26 | -38.6% | \$19.19 | \$104.32 | -81.6% | 22.4% | 74.5% | -69.6% |
| Southern | \$71.18 | \$90.40 | -21.3% | \$26.07 | \$54.95 | -52.6% | 36.5% | 60.5% | -39.0% |
| Willamette Valley | \$76.09 | \$108.48 | -29.9% | \$25.48 | \$69.39 | -63.3% | 33.5% | 62.8% | -45.8% |

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

| Group | Apr 26 | Apr 27 | Apr 28 | Apr 29 | Apr 30 | May 1 | May 2 |
|--------------|--------|--------|--------|--------|--------|-------|-------|
| All | -8% | -8% | -7% | -10% | -14% | -14% | -14% |
| Rep/Lean Rep | -16% | -15% | -20% | -25% | -25% | -28% | -24% |
| Dem/Lean Dem | -20% | -22% | -20% | -22% | -20% | -27% | -23% |
| White | -16% | -15% | -20% | -25% | -25% | -28% | -24% |
| Black | -28% | -38% | -42% | -44% | -41% | -38% | -36% |
| Hispanic | -28% | -32% | -34% | -37% | -35% | -35% | -35% |
| U.S. born | -26% | -25% | -24% | -26% | -26% | -39% | -42% |
| Foreign born | -26% | -25% | -24% | -26% | -26% | -39% | -42% |

The chart displays the percentage of respondents who believe the U.S. is responsible for the crisis in the Middle East. The data is broken down by overall population and various demographic groups. The Y-axis represents the percentage, ranging from -40% to -80% in increments of 20%. The X-axis shows dates from April 26 to May 2, 2017. The lines represent different groups: Overall (orange), Democrats (dark teal), Republicans (maroon), Whites (light blue), Blacks (olive green), Asians (green), and Hispanics (purple). The overall trend shows a decrease in responsibility attributed to the U.S. over the week, with a notable drop for the overall population and Democrats on May 1.

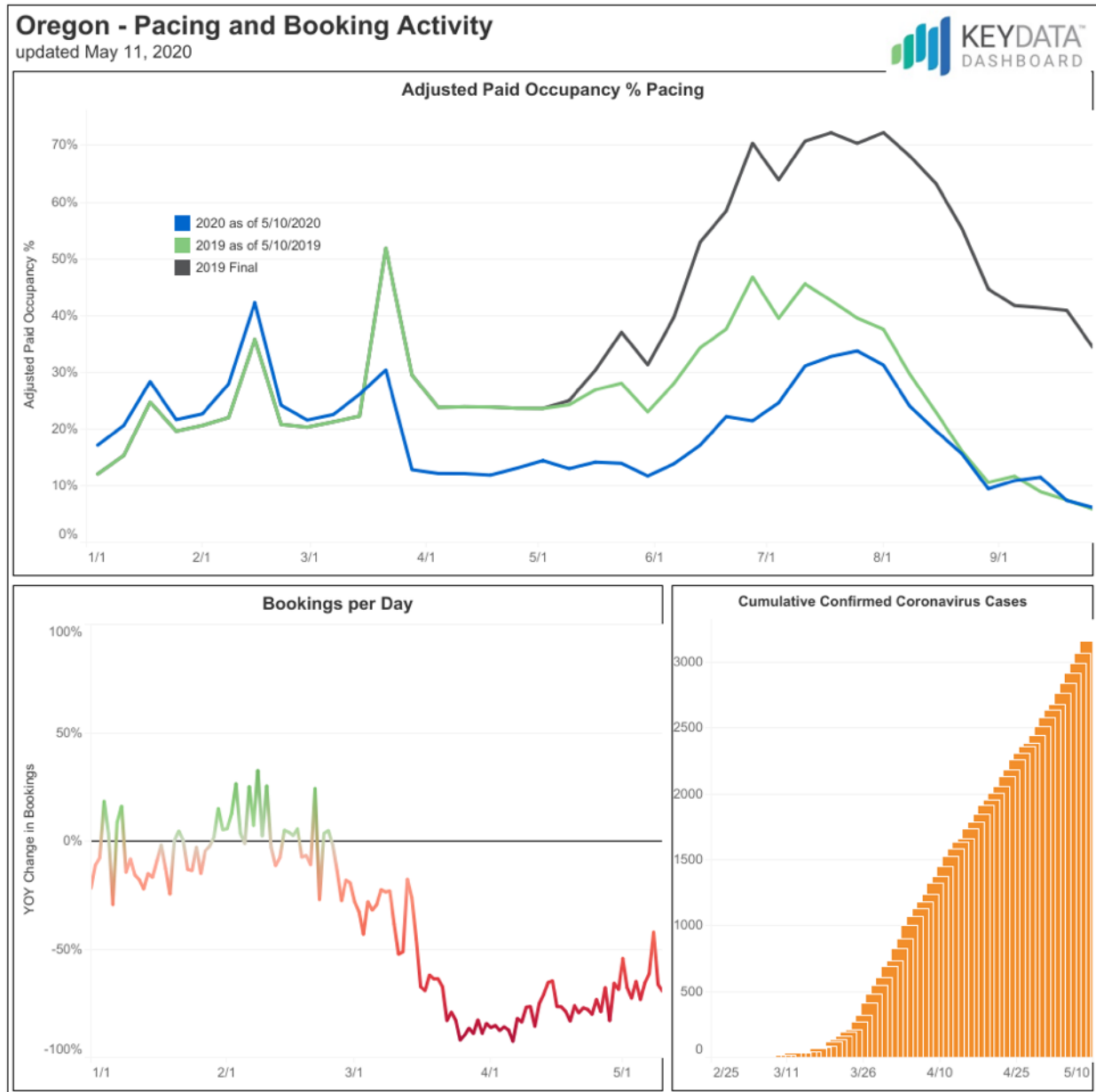
| Date | Overall | Democrats | Republicans | Whites | Blacks | Asians | Hispanics |
|--------|---------|-----------|-------------|--------|--------|--------|-----------|
| Apr 26 | -40% | -50% | -58% | -68% | -72% | -68% | -75% |
| Apr 27 | -41% | -50% | -56% | -62% | -50% | -68% | -80% |
| Apr 28 | -39% | -50% | -54% | -60% | -58% | -70% | -82% |
| Apr 29 | -43% | -50% | -54% | -60% | -65% | -70% | -82% |
| Apr 30 | -45% | -50% | -58% | -65% | -65% | -70% | -81% |
| May 1 | -58% | -60% | -72% | -80% | -70% | -75% | -81% |
| May 2 | -55% | -59% | -74% | -83% | -73% | -76% | -81% |

The chart displays the percentage of respondents who believe the U.S. is responsible for the crisis, broken down by country. The data is presented as a line chart with the following series:

- U.S. (Yellow):** Starts at approximately 35% on Apr 26, peaks at 40% on Apr 28, and ends at 30% on May 2.
- U.K. (Dark Blue):** Starts at approximately 35% on Apr 26, remains relatively stable until Apr 29, then drops to 30% on May 1 and ends at 35% on May 2.
- France (Maroon):** Starts at approximately 45% on Apr 26, peaks at 50% on Apr 29, and ends at 40% on May 2.
- Germany (Green):** Starts at approximately 55% on Apr 26, remains stable until Apr 29, then drops to 50% on May 1 and ends at 55% on May 2.
- Italy (Light Blue):** Starts at approximately 60% on Apr 26, peaks at 65% on Apr 28, and ends at 60% on May 2.
- Spain (Red):** Starts at approximately 60% on Apr 26, remains stable until Apr 29, then drops to 55% on May 1 and ends at 60% on May 2.
- China (Purple):** Starts at approximately 65% on Apr 26, drops to 60% on Apr 28, and ends at 65% on May 2.

The chart shows a general downward trend in blame for the U.S. across all countries, with the U.S. leading in blame throughout the period.

Oregon Vacation Rentals



Social Sentiment

This week we are taking a qualitative look at what is driving social conversations versus running our usual quantitative report.

Key things are:

- **Oregon Openings:** The gradual re-opening of Oregon drove significant media attention over the past week. Coverage was driven by:
 - **Public Lands:** OPRD's re-opening of day-use facilities across the state drove significant attention across Oregon media and influencers this past week. Local outdoor journalists @ [HaleJamesB](#) and @ [ZachsORoutdoors](#) set the tone for the coverage detailing [restrictions](#) and [visitor behavior](#) during the week.

While crowding was a concern from OPRD, a cursory review of Instagram and Twitter posts from key locations (Tryon Creek, Detroit Lake, Lake Billy Chinook and White River Falls)

indicates that while parks were busy, they were manageable with visitors respecting social distancing etiquette.

- **Oregon Coast:** The Oregon Coast (particularly the north) continues to be a flashpoint in the re-opening conversation. Social posts detailing the opening of day-use areas had many individual commenters asking about coastal closures and over the weekend beaches closed (and barricaded) in Seaside and Cannon Beach and more than [700 visitors turned away from the beach](#). In addition, a rampant infection rate has been reported at [two seafood factories](#). Finally, activists that organized protests in Salem last week are now [taking their efforts to Seaside](#).
- **Counties:** The governor's announcement on Thursday on a re-opening plan for Oregon countries is driving interest with reports today detailing that [20 counties have submitted proposals](#) for review for Phase 1 re-opening by May 15.
- **Shanghai Disney Opening:** For a look ahead on how travel emerges from the shadows of COVID-19, this [AP story](#) detailing opening day at Shanghai Disney is telling: Disney is "limiting visitor numbers, requiring masks and checking for the virus's telltale fever and is practicing social distancing." Media analyst Rich Greenfield [tweeted a video](#) of the socially-distant experience in Shanghai and commented that it "does not feel like a vacation" and he "can't see this driving attendance" in the United States.
Despite this, it should be noted that tickets for the opening day were sold out within hours, indicating that there will be pent up demand despite the new normal social distancing and masking requirements.
- **Plandemic:** Over the past week, a professionally produced 26-minute video has been making the rounds across social media and message threads. The video features a disgraced (and fired) former medical researcher who claims to know the "hidden agenda" behind COVID-19. While the video continues to be removed from sharing platforms, it keeps popping up and has been viewed millions of times. [Full story](#).

As more public and countries start to open, DMO messaging needs to reinforce and amplify safety messaging while inspiring audiences about travel messaging.

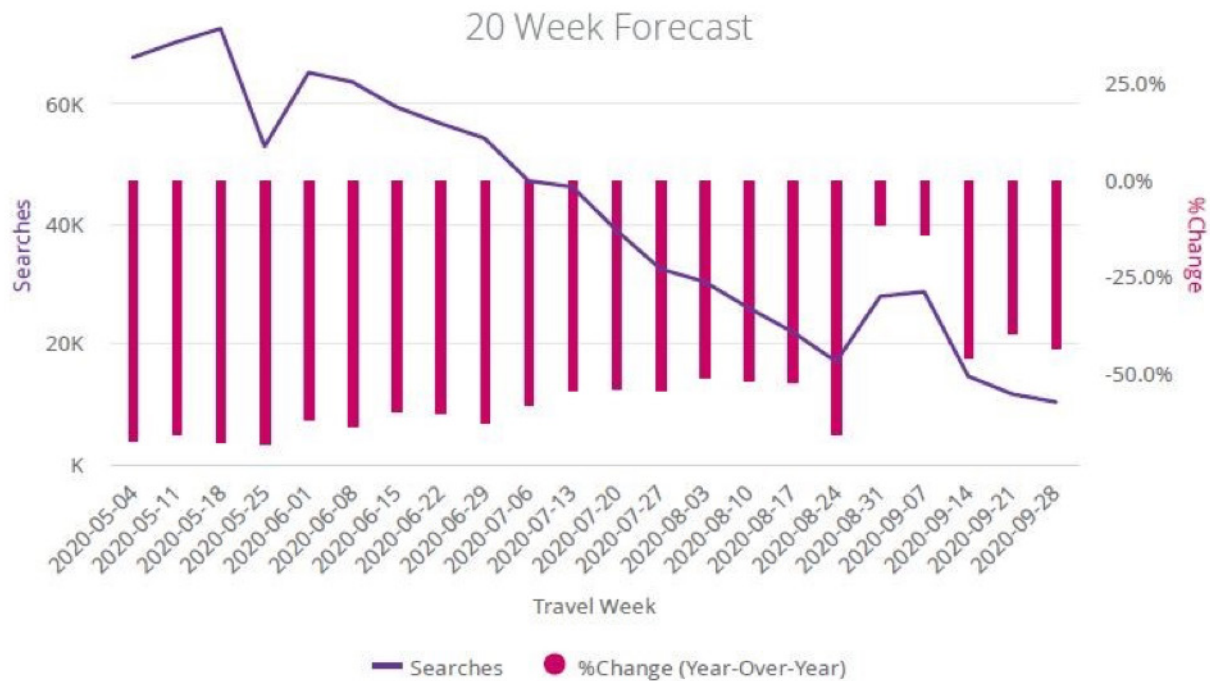
ADARA: Tracking Search and Booking Behavior

ADARA has access to search and booking data for several airlines and hotels. They have provided a forward-looking analysis of searches or travel intent.

Weekly searches and bookings for Oregon (U.S domestic)



Travel intent for the upcoming weeks to Oregon (U.S domestic)

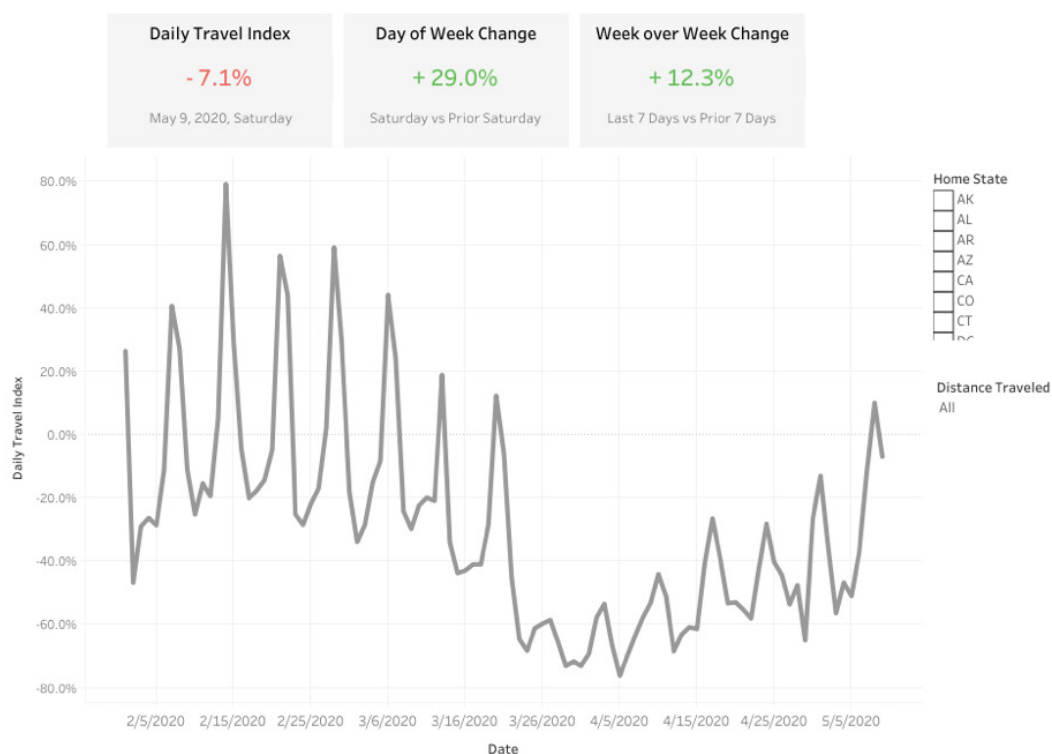


How well are we social distancing?

Arrivalist's Daily Travel Index measures consumer road trips of 50 miles or more in all 50 U.S. states. The data is drawn from a panel of GPS signals representing road trips taken by car.

In Oregon, trips of 50 miles or more were up 12.3% last week compared to prior week. However, May daily traffic compared to average daily traffic for month of February is down by 7.1%.

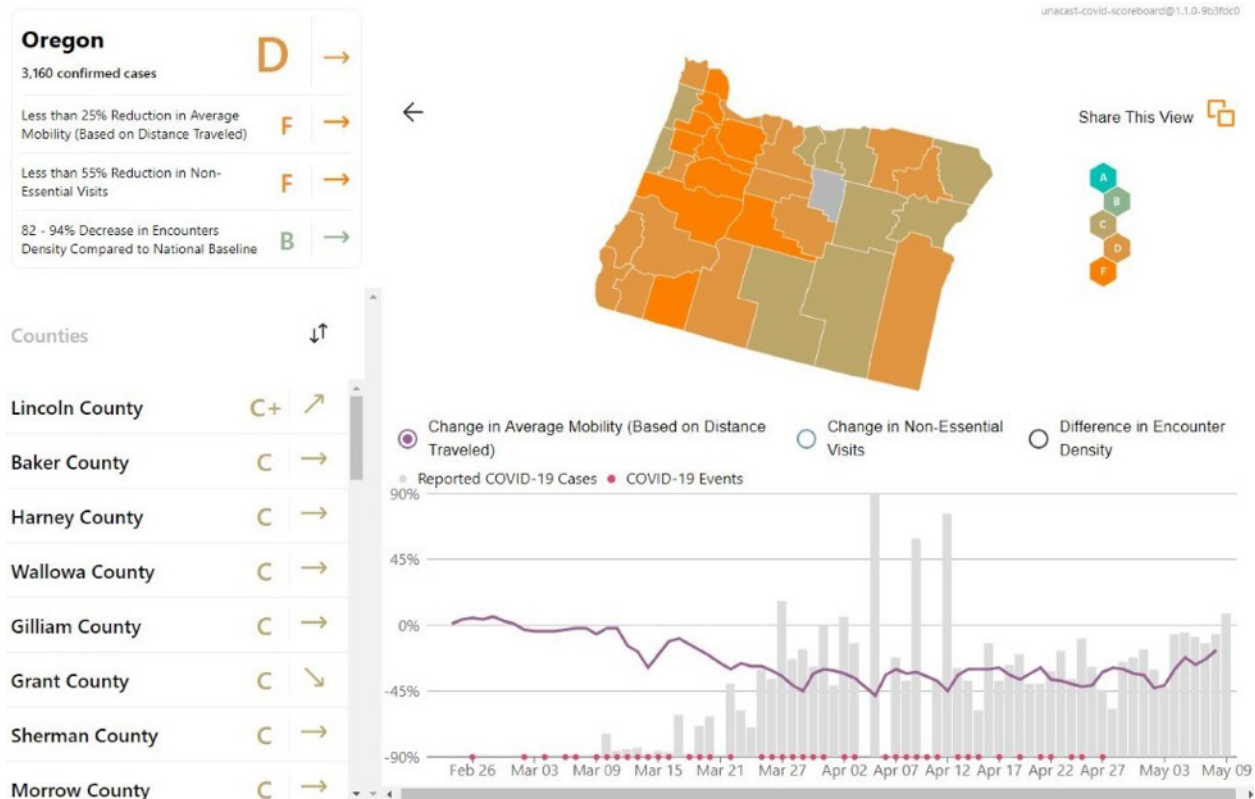
Arrivalist US Daily Travel Index



Daily drive market index of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours on their journey. The index is the relative daily volume of travelers compared to the average number of daily travelers in February 2020.
Last updated: 05/09/2020

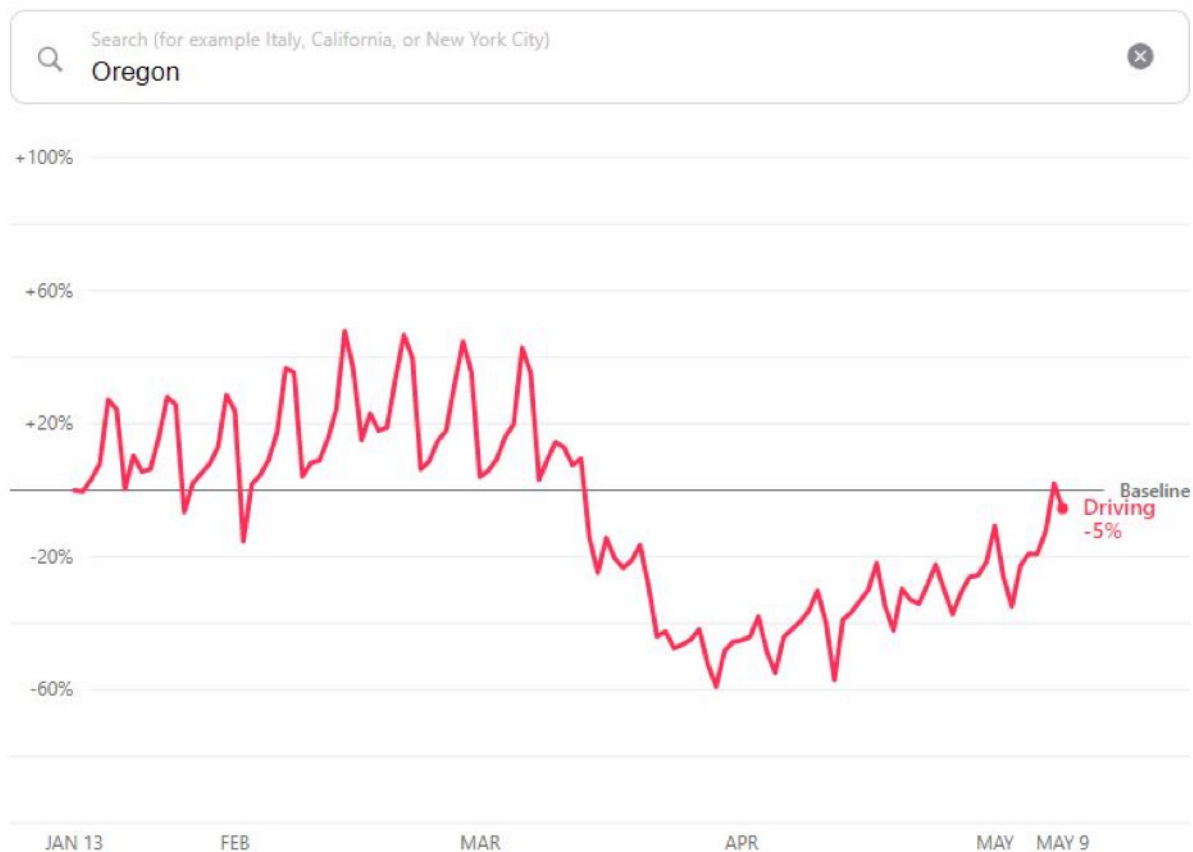
Unacast, a Norwegian company which collects and analyzes location data from various sources, released a study ranking all 50 states and the District of Columbia on a Social Distancing Scoreboard, updated daily, to empower organizations to measure and understand the efficacy of social distancing initiatives at the local level.

Oregon and Washington both received a D (25-40% reduction in average mobility).



Apple Mobility Trends

Change in routing requests since January 13, 2020










National Trends

Destination Analysts: Update on Coronavirus' Impact on American Travel—Week of May 11

- Americans travelers are feeling more comfortable this week, but not necessarily more confident. Many May Be Waiting to Assess the Experience of the Early (Re)Adopters to Travel.
- Women and Boomer travelers continue to exhibit more elevated levels of caution around the virus and travel.
- The percent of American travelers who feel they will avoid travel until coronavirus is resolved continues to slowly decline (64.8%), and the perceived safety of flying on a commercial airline, staying in a hotel, dining in restaurants and visiting attractions continues to improve from lows seen in early April.
- Americans estimate the distance of their next road trip to be 423 miles on average, although 43.2% report it will be under 200 miles.
- Travel advertising can deliver joy, especially in the right setting. This week, 17.8% of American travelers recall seeing a travel destination ad within the past month and 56.3% say the most recent travel ad they saw made them feel happy. This feeling was particularly pronounced among Millennials.
- Over 85 percent of Millennial and GenZ travelers –and 7 in 10 GenX and Boomer travelers– cite a digital resource as where they will be most receptive to a travel messaging reaching them, with social media powerhouses like Instagram and Facebook as well as search engine marketing appearing the likeliest means for meeting travelers where they are. Email also looks to be one of the best ways to reach all ages of travelers.

Where Are You Most Receptive to Learning about Travel Destinations Right Now?

| | | Millennial/GenZ | GenX | Baby Boomers |
|---|----------------------------------|-----------------|-------|--------------|
|  | Instagram | 32.7% | 12.9% | 5.8% |
|  | Facebook | 25.5% | 20.7% | 15.2% |
|  | Websites found via Search Engine | 20.4% | 33.5% | 40.1% |
|  | Online Articles/Blogs | 18.6% | 19.6% | 20.7% |
|  | TikTok | 16.6% | 2.0% | 0.8% |
|  | Ads around the Internet | 16.6% | 16.5% | 19.0% |
|  | Email | 16.1% | 25.8% | 30.6% |
|  | Twitter | 15.9% | 6.3% | 3.3% |
|  | Pinterest | 15.4% | 5.5% | 4.5% |
|  | Text Messages | 13.7% | 7.3% | 3.2% |
|  | Digital Influencers | 8.4% | 4.2% | 1.0% |
|  | Apps | 7.6% | 4.3% | 2.7% |
| | None of these | 14.1% | 29.8% | 25.8% |

Destination  Analysts
DO YOUR RESEARCH

How Much Do You Miss the Following? (% Saying "Miss Terribly" or "Miss A Lot")



Vacations
(68.4%)



Dining in Restaurants
(59.9%)



Planning Travel
(56.1%)



Weekend
Getaways
(52.8%)



Live Concert/Musical
Performance
(35.1%)



Going to
Museums
(33.4%)



Going to Bars
(32.9%)



Attend Professional
Sporting Event (30.5%)



Business Trip
(19.3%)



Going to Conventions
(16.9%)

Destination  Analysts

The Harris Poll COVID-19 Tracker

The following are some of the highlights that are related specifically to travel within the [Harris Poll: "American Resolve: Attitudes, Values and Lives in the Pandemic"](#)

- In response to "major purchases planned once things return to normal," travel ranked #1 (selected by 52% of respondents), higher than buying new clothes (43%), buying household goods (33%) or attending a concert or sporting event (28%)
- Despite the urge to travel, most respondents said it will take them at least six months before they will take their next vacation
- Men, Gen Z/Millennials and higher income households are most eager to book a vacation

Tourism Economics

Tourism Economics shows a week by week outlook on travel spending in the U.S. including a look at regional and state-by-state breakdown. [Findings from the May 6 report:](#)

- National weekly travel spending rose slightly to \$2.5 billion last week as select states began easing their lockdown measures
- In the week ending May 2, the travel economy witnessed its first expansion in nine weeks but still registered 88% below last year's levels (a \$19.4 billion loss)
- Since the beginning of March, the COVID-19 pandemic has resulted in over \$138 billion in cumulative losses for the U.S. travel economy
- Four states witnessed losses of over 90%, and Hawaii and Washington, D.C. endured yet another week of declines exceeding 95%
- Declines in travel spending have caused a loss of \$17.9 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.mmggyglobal.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/>

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