

Impact of COVID-19 on Travel Industry

May 6, 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.

PDX Airport Data

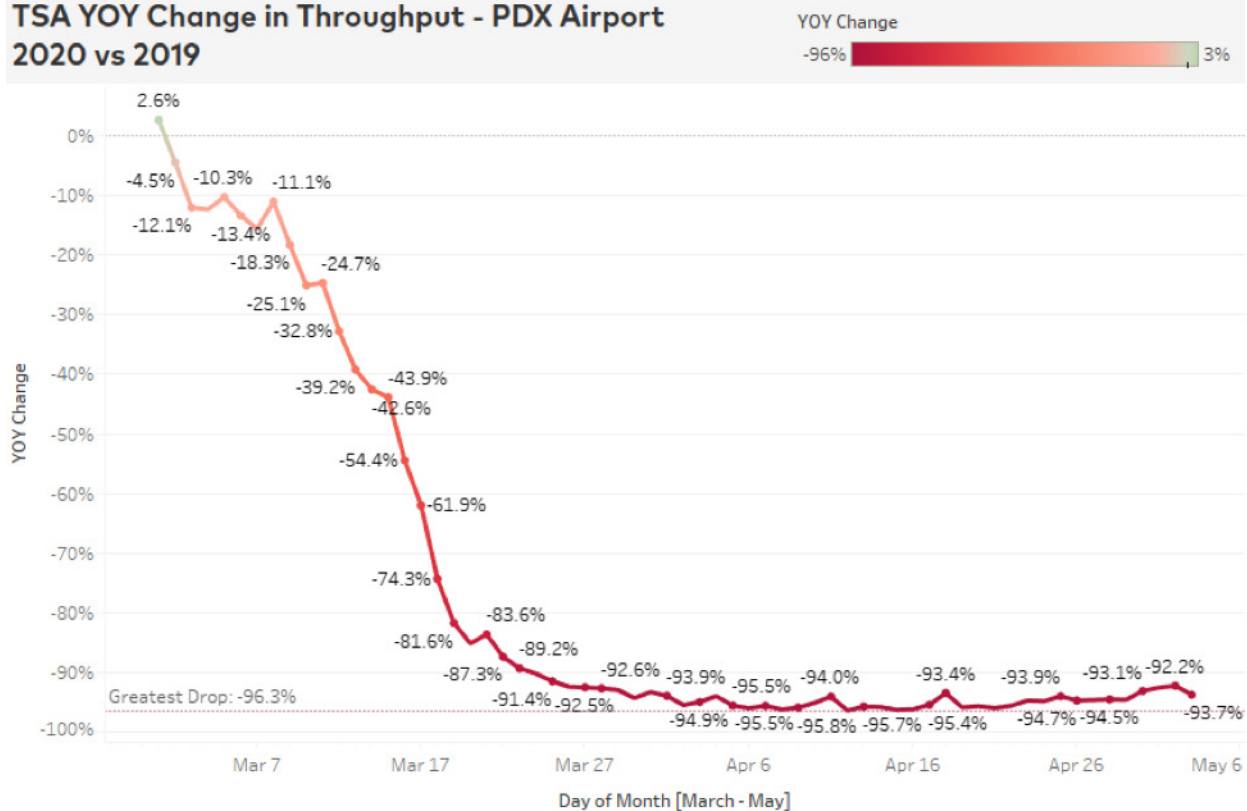
May 3th, the PDX passenger throughput was 25,064 passengers below (93.7%) the same day, last year. Month to date, May 2020, passenger throughput is 70,356 (92.8%) below last year.

The TSA reported 2,111 through the DE checkpoint on Friday, this is the first time we have been above 2,000 since March 25.

- Air Canada, Hawaiian, Volaris & WestJet have suspended service
- Condor & Icelandair start dates are to be determined.

This data is provided by Port of Portland.

TSA YOY Change in Throughput - PDX Airport 2020 vs 2019



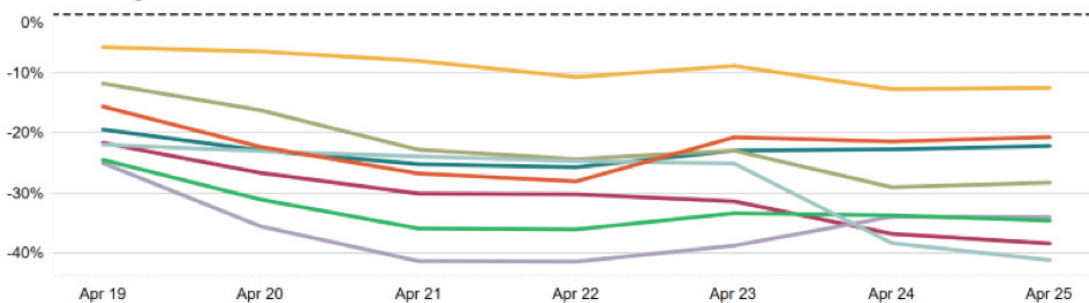
* Throughput is the count of people going through the TSA checkpoint.

STR Weekly Data (Week of April 19)

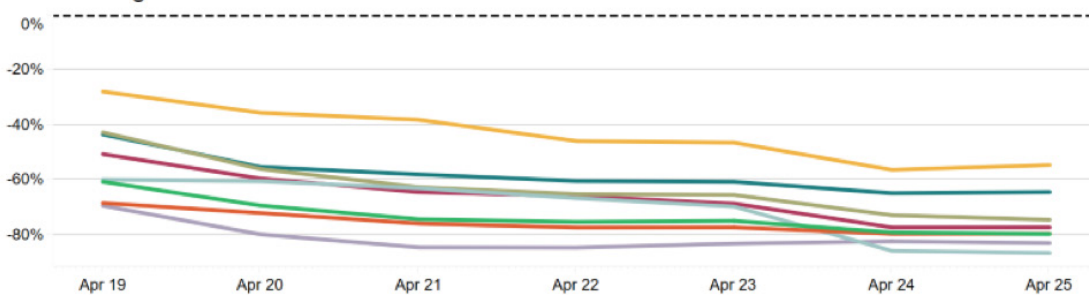
The chart below shows the year over year (YOY) change in Average Daily Rate (ADR), Revenue Per Available Room (RevPAR), and Occupancy statewide and per region in Oregon. This data is provided by STR, Inc.

Weekly STR Report 2020 vs 2019 (April 19 to April 25)									
	ADR			RevPAR			Occupancy		
Oregon	\$78.02	\$116.34	-32.9%	\$19.81	\$78.02	-74.6%	25.4%	66.4%	-60.7%
Central	\$85.74	\$110.33	-22.3%	\$18.17	\$77.43	-76.5%	21.2%	69.5%	-68.9%
Coast	\$76.66	\$108.18	-29.1%	\$16.69	\$65.06	-74.3%	21.8%	58.3%	-59.8%
Eastern	\$72.25	\$79.56	-9.2%	\$25.65	\$46.52	-44.9%	35.4%	58.2%	-38.0%
Hood/Gorge	\$77.40	\$99.84	-22.5%	\$24.55	\$69.88	-64.9%	31.7%	69.3%	-52.8%
Portland	\$84.77	\$132.75	-36.1%	\$17.71	\$98.50	-82.0%	20.9%	73.5%	-70.8%
Southern	\$68.97	\$89.56	-23.0%	\$21.98	\$53.97	-59.3%	31.8%	59.9%	-45.7%
Willamette Valley	\$74.28	\$107.94	-31.2%	\$22.38	\$71.34	-68.6%	30.1%	64.9%	-51.9%

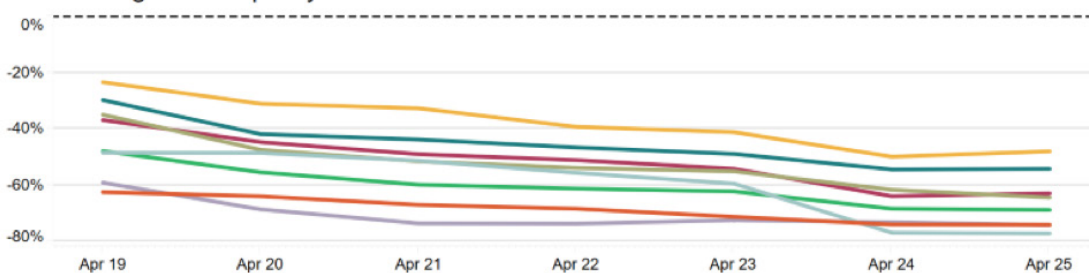
YOY Change in ADR



YOY Change in RevPAR



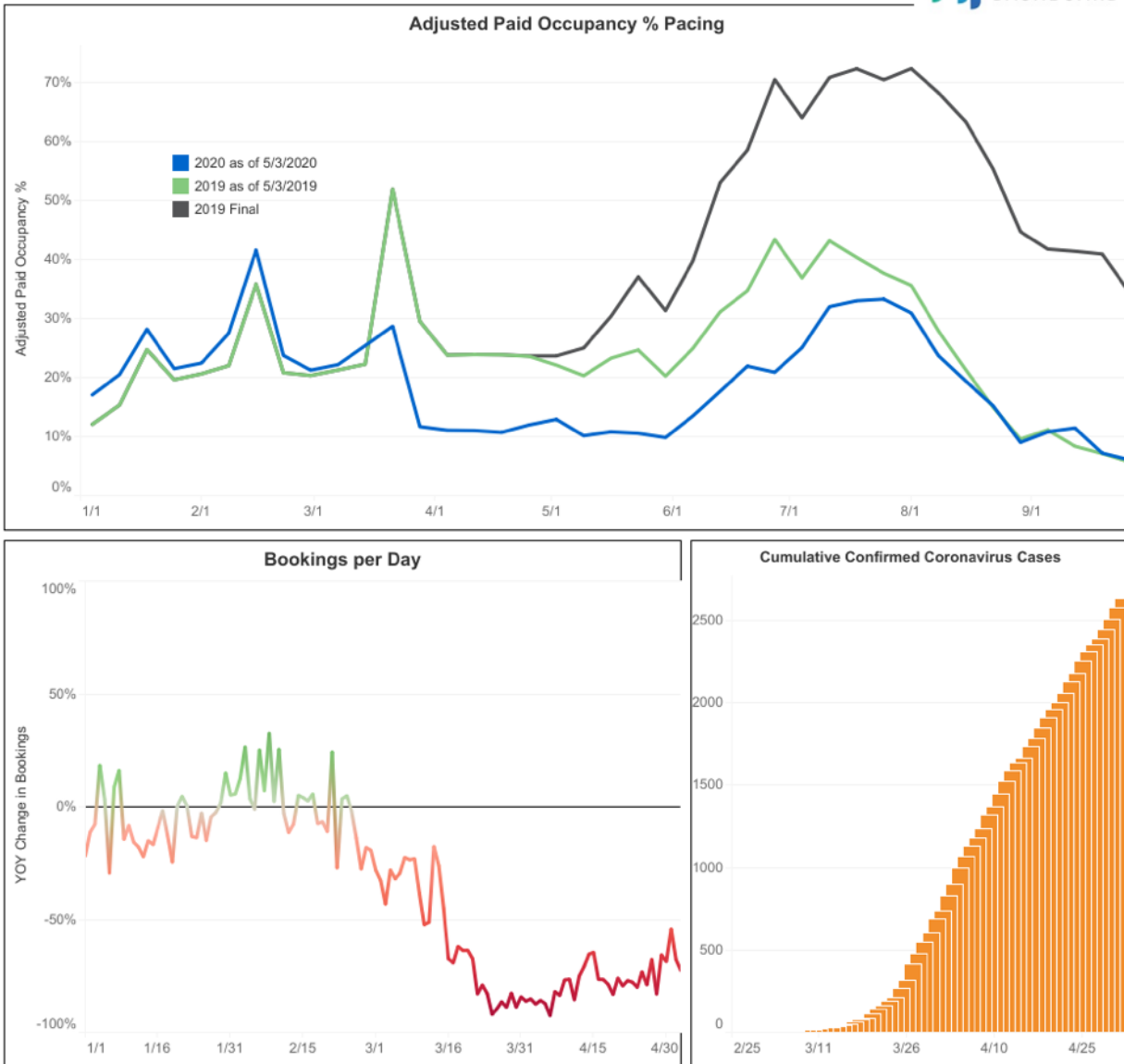
YOY Change in Occupancy



Oregon Vacation Rentals

Oregon - Pacing and Booking Activity

updated May 4, 2020



Social Sentiment

This week we are taking more of a qualitative look at what's happening in social versus running our usual quantitative report. Key things are:

- As some states extend stay-at-home orders past April 30, other flirt with re-opening and the weather becomes warmer, consumers are coming restless and frustrated. We saw this over the past week as people posted pictures of crowds congregated in Washington D.C., Huntington Beach and New York City. Instead of distracting or avoiding these sentiments, marketers must pivot messaging and imagery to be sensitive to the changing world.
- The conversation surrounding coronavirus is increasingly political and will be difficult to ignore. This is manifesting itself around the conversations on face coverings (see below) and lockdowns and re-opening strategy and conflict between [state and federal policy](#). Travel brands will need to prepare comprehensive community management strategies to respond to divisive comments.

- According to MMGY, [online conversations](#) about travel cancellations have decreased 30% in the last week, while mentions of needing or wanting a vacation are up by 130%.
- Usage is still up across all platforms as people cope with prolonged uncertainty, but burnout and boredom are rampant.

Messaging recommendations from last week still hold true: be a resource, demonstrate solidarity, provide tips on coping with quarantine and be a source for sharing good news.

Other Hot Topics in Media and Travel

- **Re-Openings:** While 24 states starting to [partially open or re-opening soon](#), medical professionals are noting that in many parts of the country the curve hasn't flattened and "[infections, hospitalizations, and deaths continue to increase.](#)" Unfortunately, the impact of these re-openings will not be seen in hospital data until June.
- President Trump's own former FDA commissioner Scott Gottlieb says: "Even as more economic activity is restarted, COVID-19 is expanding in many states and we face a persistent plateau of 30,000 daily cases and 2,000 deaths." Gottlieb has a [new op-ed for the WSJ](#), saying "hospitals and public-health systems will have to contend with persistent disease and death."

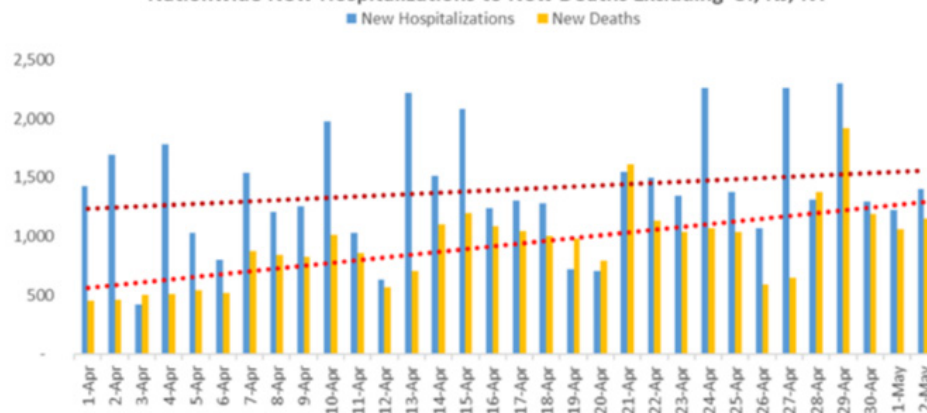
Nationwide New Confirmed Cases Excluding CT, NJ, NY



Source: COVID Tracking Project



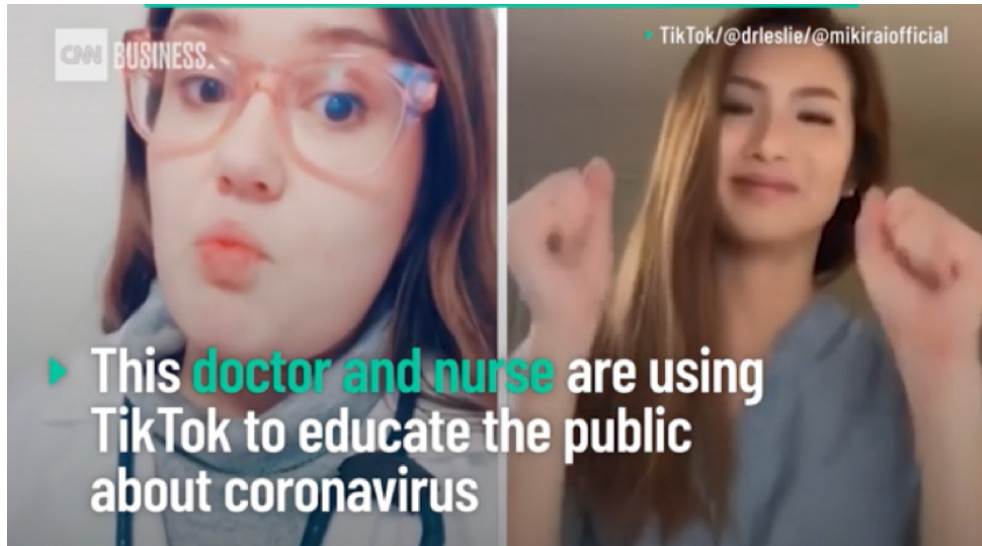
Nationwide New Hospitalizations to New Deaths Excluding CT, NJ, NY



Source: COVID Tracking Project



- **To Mask or Not to Mask:** With the CDC continuing to recommend use of face coverings or masks and many states and businesses either mandating them, the decision to wear (or not to wear) a face mask is becoming a flashpoint in our culture. From dirty looks and intimidation to [shootings](#), masks have come to be symbolizes as "rebellion" or an "act of consideration" in the time of COVID-19. This gained [significant buzz online](#) when Vice President Mike Pence was shamed into admitting that he was wrong for not wearing a mask during a tour of the Mayo Clinic last week. It's also however clear that masks are here to stay (for now) as Delta Air Lines, American Airlines, Southwest and United Airlines mandate that [passengers' use of face masks](#) on board planes.



- **Social Medicine:** With rampant misinformation and pseudo-cures trending, medical professionals are using their medical credentials to fight misinformation and [are becoming social media influencers](#). These updates from ground zero provides a stark, emotional and a well-rounded view into the real impact of COVID-19. It's noteworthy that several Oregon doctors have been prominently featured including OHSU doctors [Esther Choo](#), who has been featured as an expert across many broadcast programs including *Meet the Press* and [Jason Campbell](#) (aka the [TikTok doctor](#)).
- **Travel In The New Normal:** US Travel released a new [15-page report](#) with the aim of restoring traveler confidence and influencing policymakers. There are six main guidelines in the report and includes examples such as use of PPE, enhanced cleaning protocols, use of social distancing and touchless solutions across the travel ecosystem.

- **We are moving:** Data from [Apple](#) and other sources show that [we are getting antsy to get outside](#) and folks are starting to venture out. As many states either start the re-opening process or release plans to do so, the median distance traveled is starting to tick up.

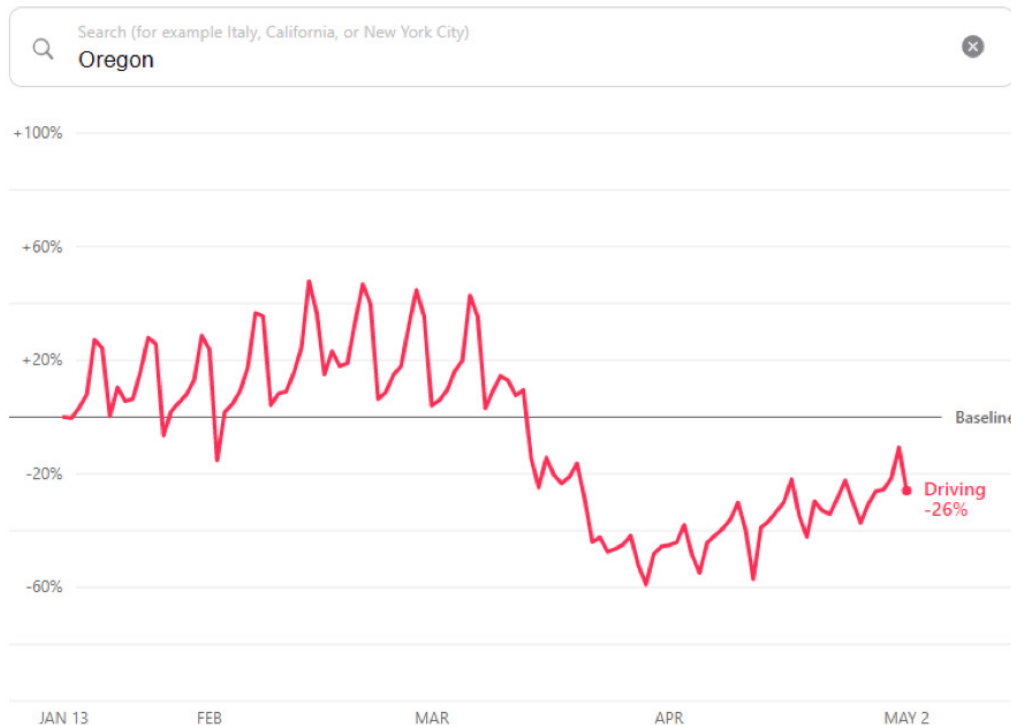
The median distance traveled each day in the US has started to tick up as shelter-in-place orders ease

Distance measured in degrees

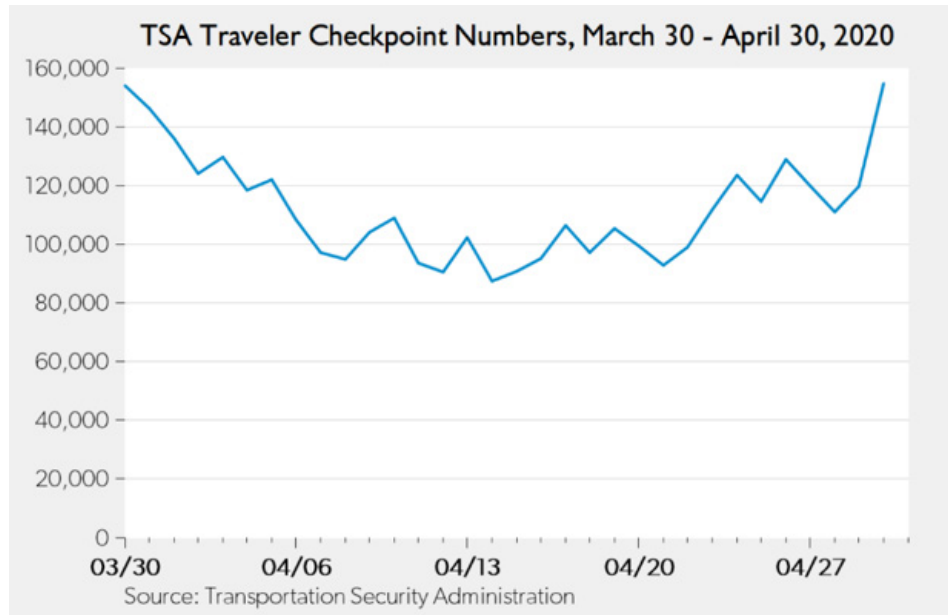


Mobility Trends

Change in routing requests since January 13, 2020



TSA traveler checkpoint data also shows an increase in travel as we head into May.



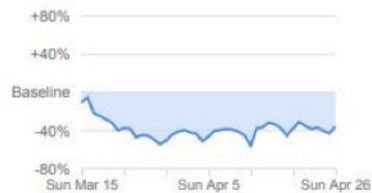
How well are we social distancing?

Google reports changes in mobility to help understand responses to social distancing guidance related to COVID-19 in Oregon.

Retail & recreation

-36%

compared to baseline

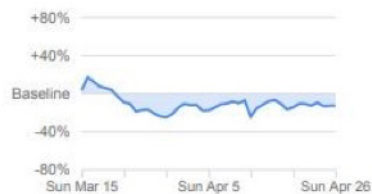


Mobility trends for places like restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters.

Grocery & pharmacy

-13%

compared to baseline



Mobility trends for places like grocery markets, food warehouses, farmers markets, specialty food shops, drug stores, and pharmacies.

Parks

+28%

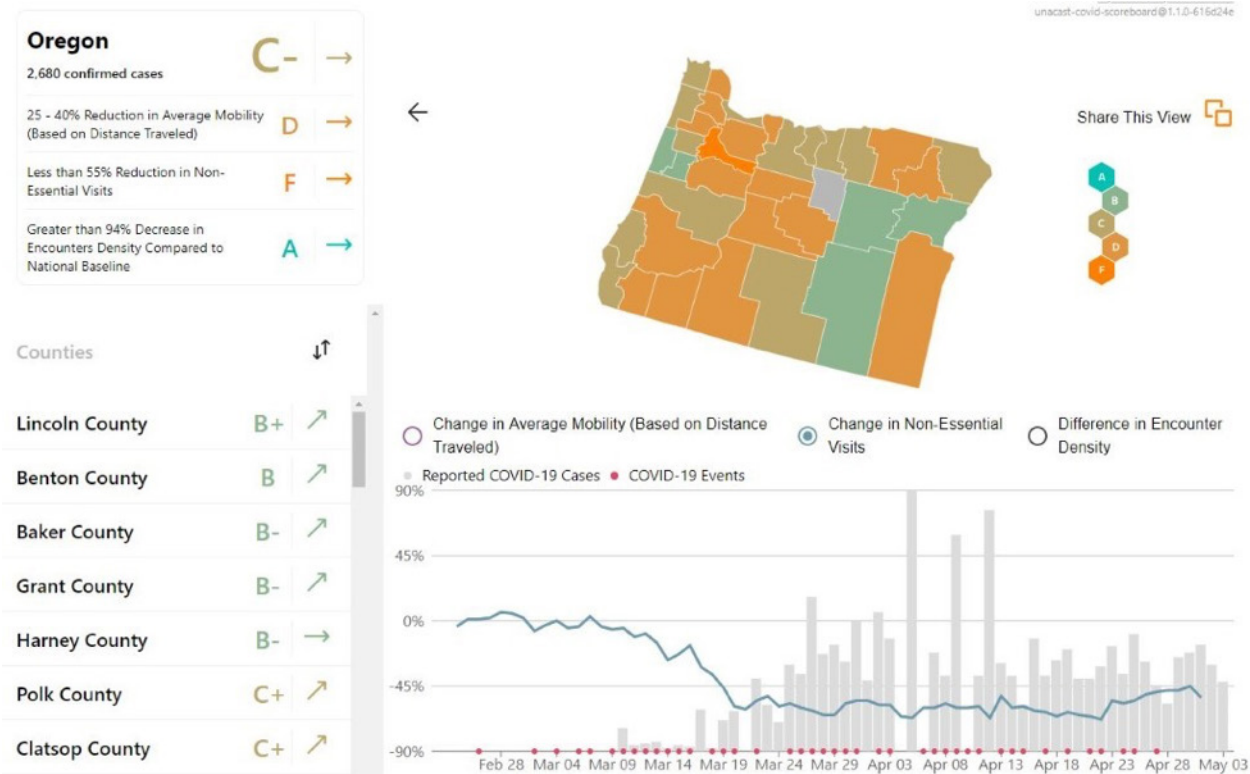
compared to baseline



Mobility trends for places like national parks, public beaches, marinas, dog parks, plazas, and public gardens.

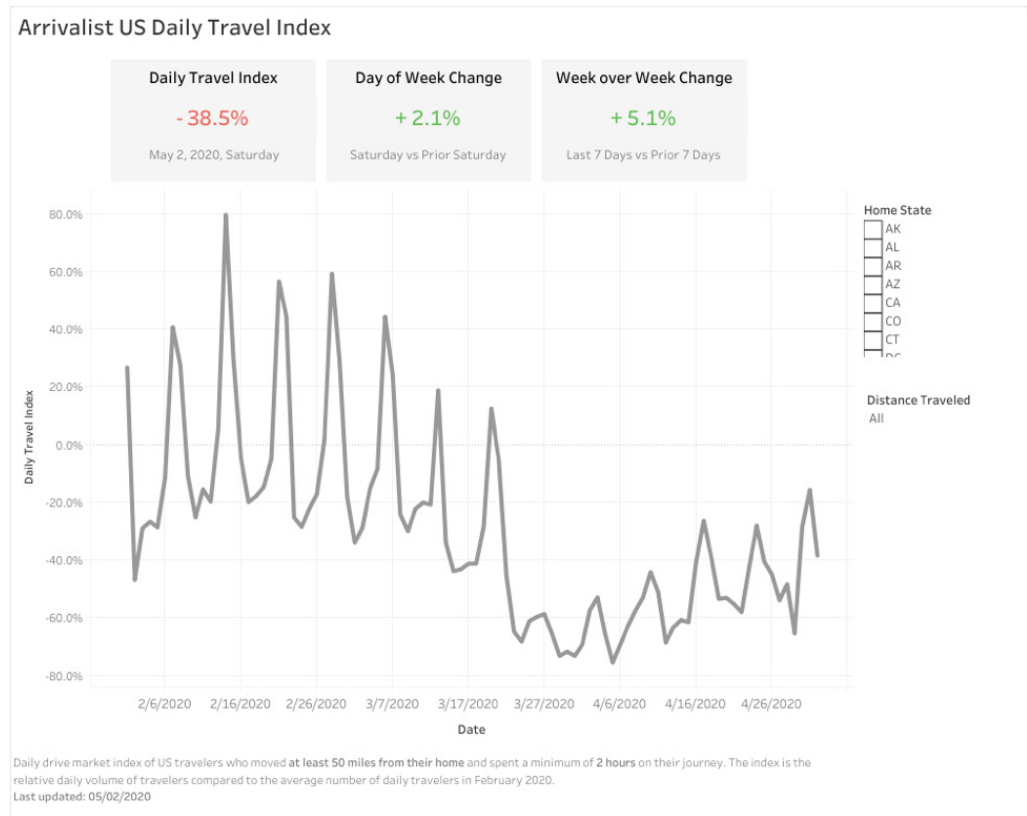
Unacast, a Norwegian company which collects and analyzes location data from various sources, released a study ranking all 50 states and the District of Columbia on a Social Distancing Scoreboard, updated daily, to empower organizations to measure and understand the efficacy of social distancing initiatives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

Oregon and Washington both received a C- (40-55% decline in average mobility).



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, according to week of April 27 updates, trips of 50 miles or more were up 5.1% compared to prior week. However, May daily traffic compared to average daily traffic for month of February is down by 38.5%.



National Trends

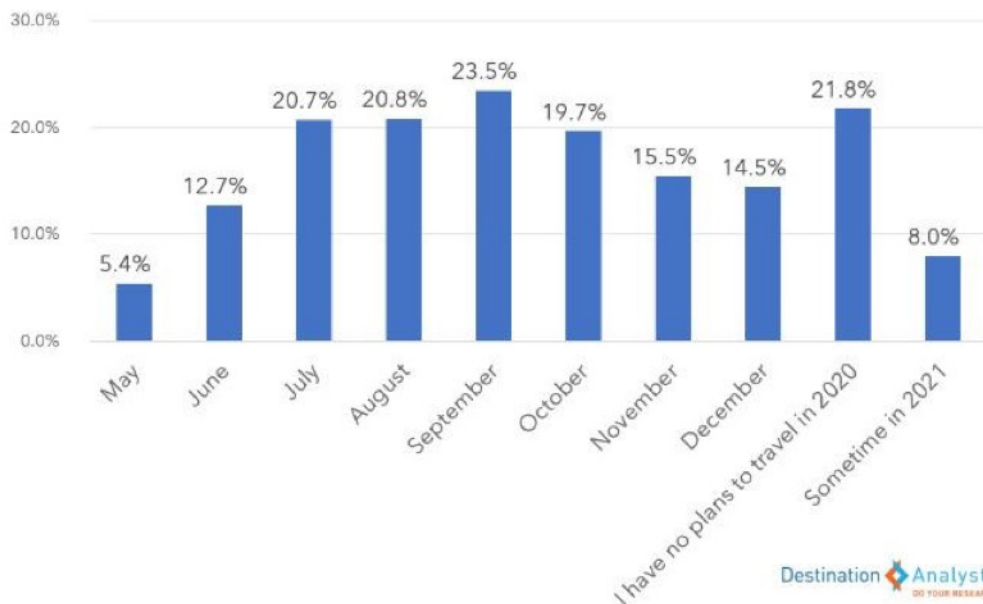
Destination Analysts: Update on Coronavirus' Impact on American Travel—Week of May 4

Americans report their next leisure trip will be to a destination 686 miles away on average, and they expect airlines and hotels to adopt new cleanliness and safety protocols to protect their health.

- **Perceptions of Safety Continue to Gradually Improve:** Concerns about personally (6.6/10) or friends & family (7.2/10) contracting the virus are at the lowest levels they have been since March 15th. Now, 33.9% feel the situation in the US will get better in the next month. Comfort going out in their own communities to undertake local activities is slowly returning--30.6% now feel comfortable from a low of 19.7% April 5th. The percent agreeing they won't travel until there is a vaccine continues to decline (29.8% down from 36.5% April 19th).
- **Looking at Travel Ahead:** The coronavirus' impact on American travel remains at 75.7%, with 69.4% canceling a trip and 54.8% postponing. September now has the highest number of American travelers having at least tentative trip plans (23.5%), with increases reported in November (15.5%) and December (14.5%), as well. The average distance of American travelers' next leisure trip is 686 miles overall, with Baby Boomers and travelers in the West and South reporting trip averages over 700 miles, and affluent travelers reporting nearly 800 miles.

Months Americans Currently Have Plans to Take a Leisure Trip

As of May 3rd, 2020



- **Air Travel Likely an Uneven Return:** Half of American travelers feel it is too risky to travel on an airplane right now with, 42.8% saying their next trip by air will not be until 2021 or later. Millennial and GenZ travelers are somewhat less uncomfortable, with more saying their next trip by air will be this year compared to older generations. Although most have some concerns about the safety of flying on commercial airlines, business travelers are the relatively most comfortable traveling by air right now.
- **The New Protocols Expected of Airlines and Hotels:** Travelers want airlines to adopt several new cleaning and spread prevention protocols, though the practices that will make travelers feel most confident an airline is looking out for their health are high-tech cleaning of planes' interiors between flights (44.4%) and requiring passenger health screenings (44.2%). Similarly, travelers expect new operational practices at hotels. What will make them most confident that a hotel is looking out for their health and safety are guests being provided with hand sanitizer, face masks, disinfectant wipes, etc. (36.8%) and having the property's cleaning/sanitizing procedures well-explained.

LODGING INDUSTRY UNITES OVER CLEANING & SAFETY

In response to the public's number one hesitation about traveling this summer and beyond – concerns over safety and contracting the virus – the American Hotel & Lodging Association today unveiled its new [SafeStay program and guidelines](#). SafeStay is AHLA's initiative focused on enhanced hotel cleaning practices, social interactions, and workplace protocols to meet the new health and safety challenges and expectations presented by COVID-19, and is aimed at creating an industry standard that can be adopted by all lodging properties regardless of size, affiliation, or location.

SafeStay was developed and continues to be defined in conjunction with an advisory council that includes some of the country's top hospitality brands, as well as public health experts, scientists, and medical leaders to develop a series of best practices for the industry, including:

- Enhanced cleaning standards throughout the hotel, including guest rooms, meeting spaces, common areas, and back-of-house spaces.
- Superior cleaning products with a greater concentration of bacteria-killing ingredients, in accordance with CDC guidelines
- Social distancing practices and reducing person-to-person contact
- Increased transparency throughout the guest journey

The complete SafeStay Enhanced Industry-Wide Hotel Cleaning Standards can be viewed and downloaded [HERE](#). Expect other industries, such as the International Air Transport Association and the National Restaurant Association to follow suit and issue their own standards, procedures, and protocols aimed at alleviating traveler concerns over safety.

Leave No Trace Center: The COVID-19 Pandemic is Changing the Way People Recreate Outdoors

In an effort to gather timely and relevant data on national recreation patterns, before, during, and after the pandemic, the Leave No Trace Center for Outdoor Ethics worked quickly with its research partner, Pennsylvania State University, to offer guidance to land managers, recreation providers, and outdoor enthusiasts across the country. In total, 1,012 outdoor recreationists were surveyed through the Leave No Trace community in a 48-hour window beginning on the morning of April 9th.

- Recreationists are going out alone, more often. Respondents significantly* decreased the average size of their outdoor recreation groups from 5.61 persons to 1.85 persons since March 11th.
- Recreationists are staying closer to home. Prior to March 11th, 10.8% of respondents typically traveled within just two miles from home to participate in outdoor recreation. Respondents are now staying significantly* closer to home, with 49.9% remaining within two miles.
- Recreationists are shifting their outdoor recreation activities. Downhill skiing and snowboarding, camping, outdoor rock climbing, and backpacking saw the biggest drops in participation directly due to the COVID-19 pandemic, while respondents reported increases in gardening, running, birdwatching and wildlife viewing, and bicycling and triathlon (may not reflect seasonal changes).
- Urban residents are most impacted. Urban residents are reducing both the amount they hike and the length of their backcountry excursions significantly* more than rural and suburban residents. They also reduced their use of public lands at a significantly* higher rate than rural and suburban residents.
- Recreationists are likely not going to wait for the risk of COVID-19 to completely go away before continuing recreation patterns. 86% of respondents indicated that they are extremely or very likely to return to their preferred recreation behaviors and patterns once their perceived threat of COVID-19 becomes minimal.

- Proactive personal health measures and guidelines are directing current and anticipated future recreation behaviors. The desire to support physical and mental health through outdoor recreation and the guidance of the Center for Disease Control, World Health Organization, and land management agencies are significantly* more important to outdoor recreationists' decision-making than social norms (i.e., what we think others are doing, or think we should be doing).
 - Some of these behaviors are likely here to stay after COVID-19 subsides. 37.7% of respondents perceive that the COVID-19 pandemic will change their outdoor recreation behaviors long into the future. The most salient changes include utilizing local public lands more often, diversifying their recreation activities, and participating in more fitness-based activities.
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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/>

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