

# Impact of COVID-19 on Travel Industry

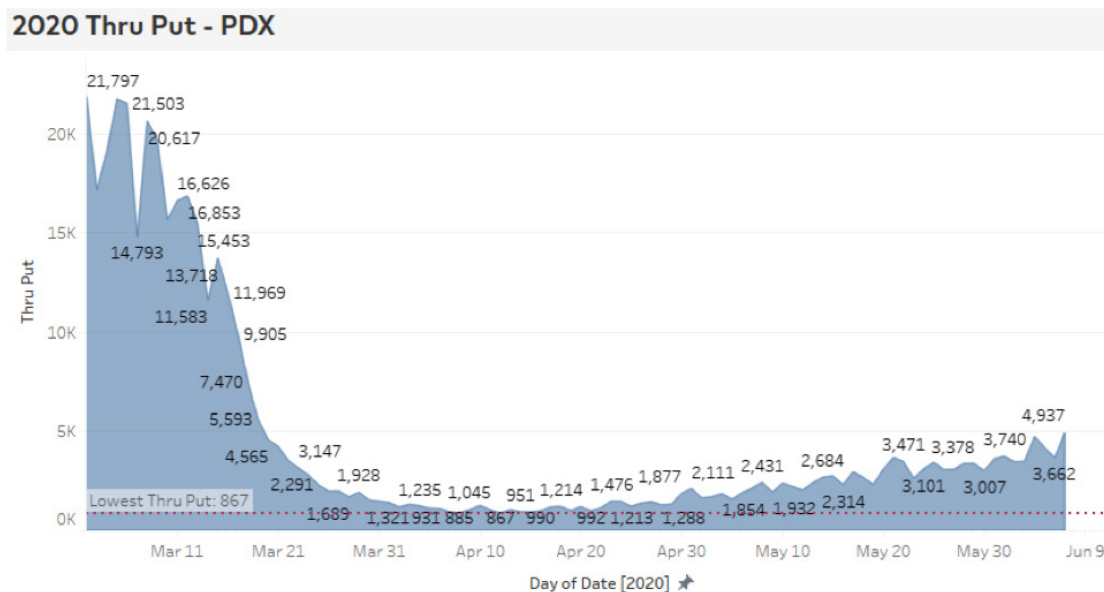
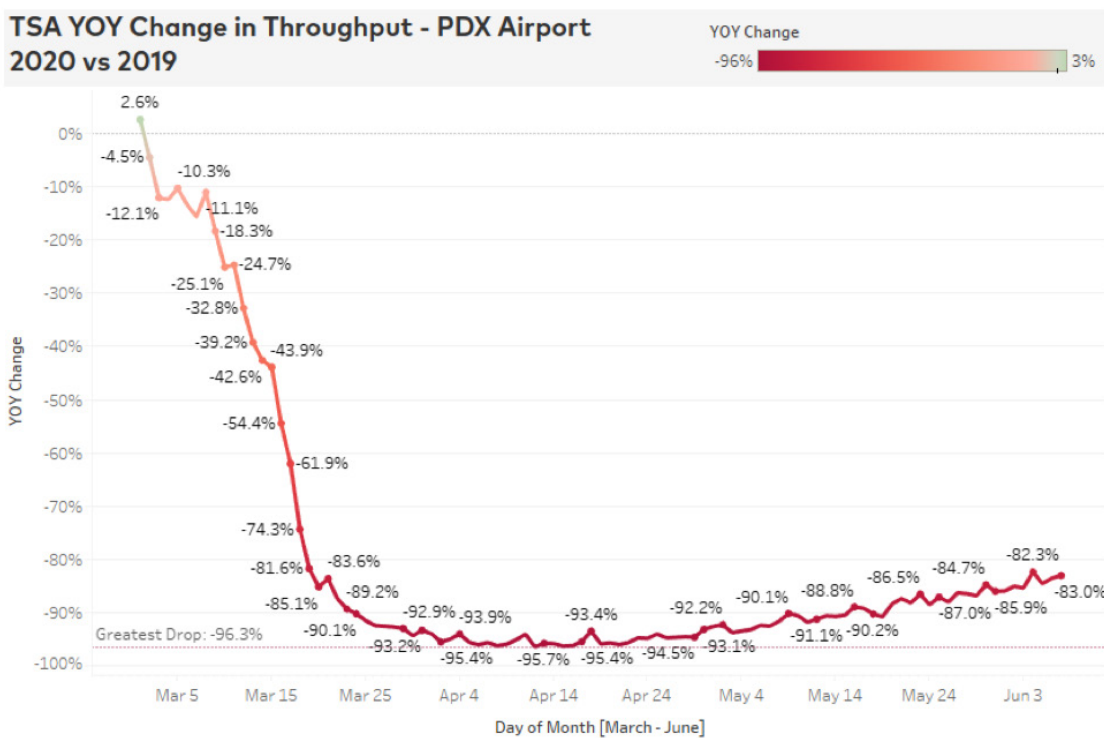
June 9, 2020

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

June 7th, the PDX passenger throughput was 28,955 passengers below (83%) the same day, last year. Month to date, May 2020, passenger throughput is 785,182 (90%) below last year.

We've have now seen our first daily throughput counts surpass 4,000. This was on Thursday and Friday of last week. This past Sunday had throughput just under 5,000.



## STR Weekly Data (Week of May 24-May30)

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.

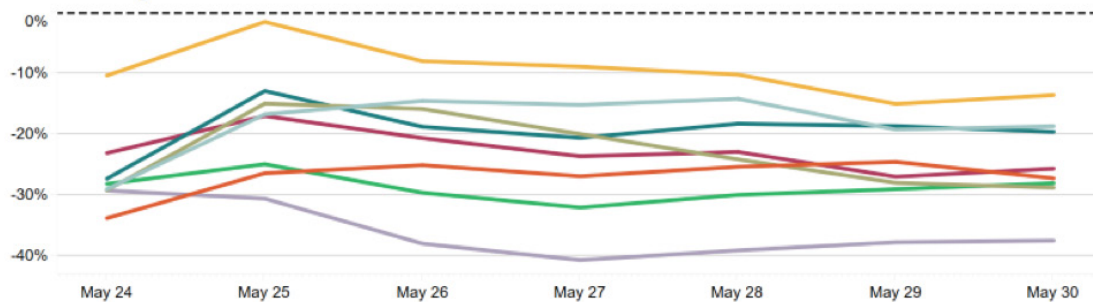


### Weekly STR Report 2020 vs 2019 (May 24 to May 30)

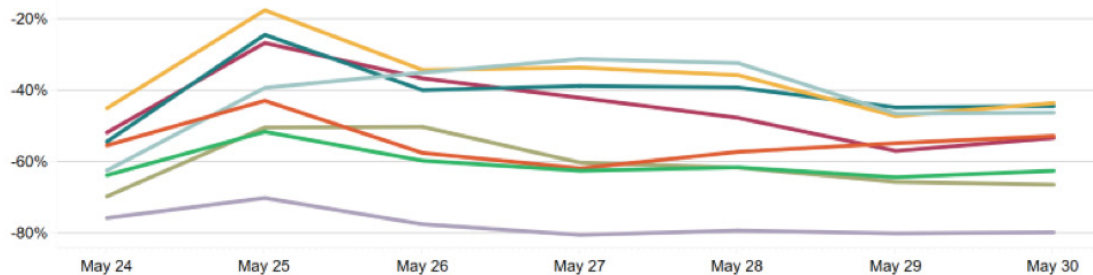
Region  
All

	ADR			RevPAR			Occupancy		
Oregon	\$87.01	\$122.28	-28.8%	\$31.26	\$81.30	-61.5%	35.8%	66.0%	-45.0%
Central	\$92.25	\$126.73	-27.2%	\$37.62	\$84.30	-55.4%	40.4%	65.9%	-37.7%
Coast	\$96.76	\$119.09	-18.8%	\$41.55	\$75.60	-45.0%	42.4%	61.5%	-29.4%
Eastern	\$77.02	\$85.39	-9.8%	\$32.40	\$52.37	-38.1%	42.0%	60.9%	-30.2%
Hood/Gorge	\$86.86	\$113.45	-23.4%	\$29.37	\$77.54	-62.1%	33.7%	67.4%	-49.2%
Portland	\$87.35	\$137.27	-36.4%	\$21.95	\$100.37	-78.1%	25.1%	72.7%	-65.0%
Southern	\$79.47	\$98.87	-19.6%	\$36.44	\$63.25	-42.4%	45.8%	63.5%	-26.8%
Willamette Valley	\$80.57	\$104.64	-23.0%	\$33.10	\$62.85	-47.3%	41.0%	59.3%	-29.1%

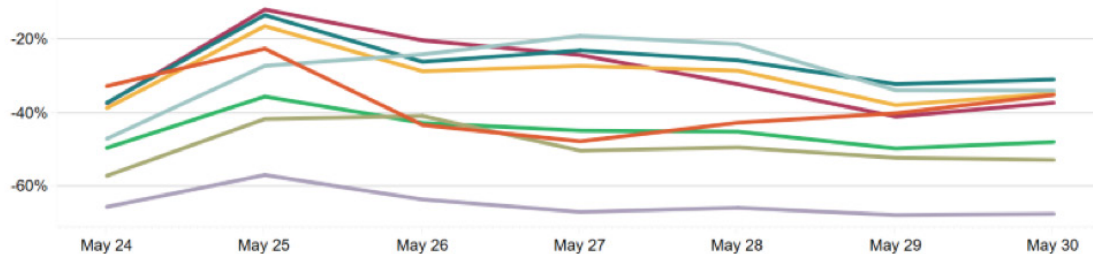
#### YOY Change in ADR



#### YOY Change in RevPAR



#### YOY Change in Occupancy



## Social Sentiment + Hot Topics

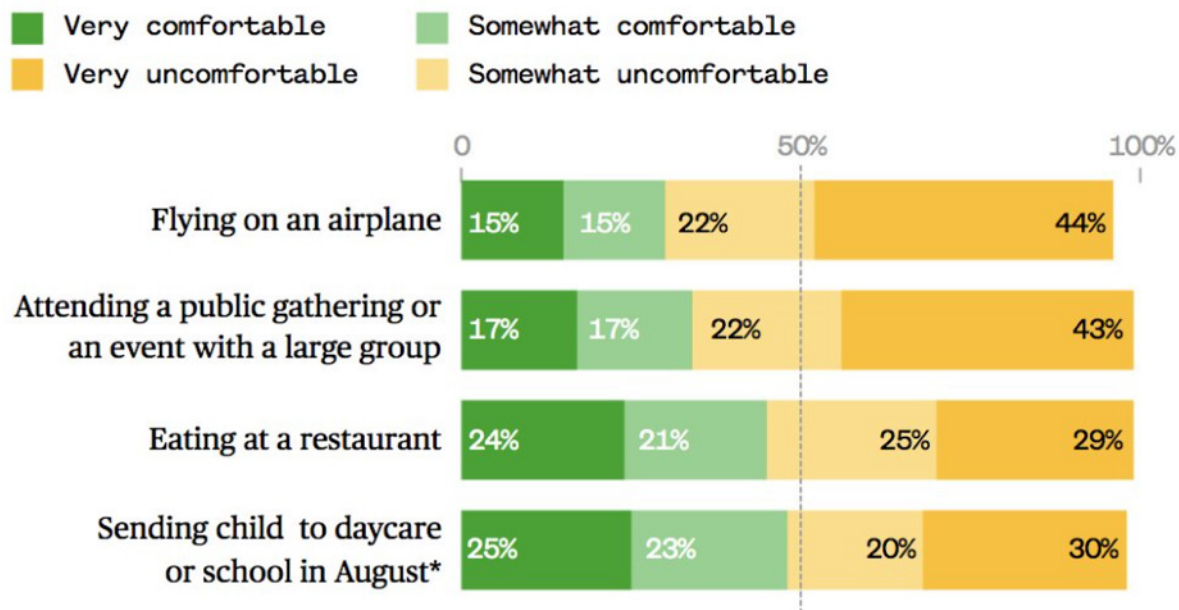
Coverage of 10 days of unrelenting protests across the country in support of social justice and racial equity following the killing of George Floyd continues to dominate the news cycle.

A few highlights specific to travel and COVID-19:

- Two significant stories garnering attention on social and in broadcast has been the reopening of [Las Vegas](#) and Universal Orlando. While the reopening of Universal Orlando was more positive focusing on how the experience has changed, the Vegas reopening had been negative due to the [video](#) and photos emerging about crowded space and people not wearing face coverings.
- A recently released NBC News/WSJ poll shows that Americans are largely uncomfortable with flying and attending large events.

### Americans uneasy about crowds, travel, school due to coronavirus

Two-thirds of voters would be uncomfortable attending a large gathering or flying on a plane.

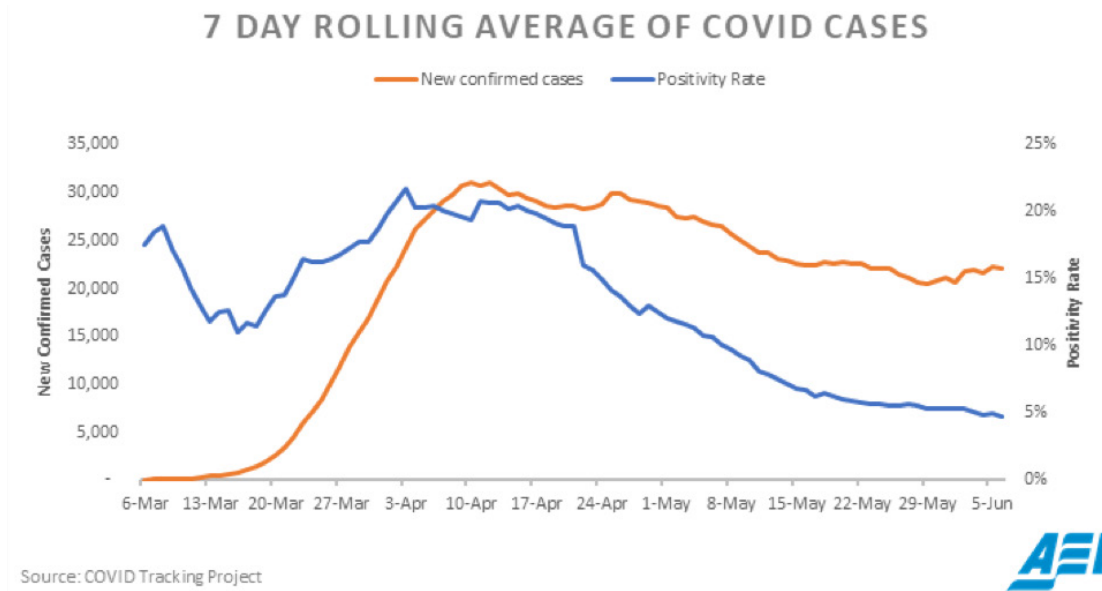


\*Asked only if children under 18 in household.

Source: NBC News / WSJ poll conducted May 28-June 2, 2020 with margin of error +/- 3.1%.

Graphic: Jiachuan Wu / NBC News

Finally, nationally, average daily hospitalizations for COVID-19 increased last week. This graph shows average daily hospitalizations for 34 states that report daily data, with rates increasing in the south and west. Additionally, there's fear that large protests across the country may trigger infections across the country. However, there is consensus that the proximity of states' reopening to the protests will make isolating cause and effect difficult.

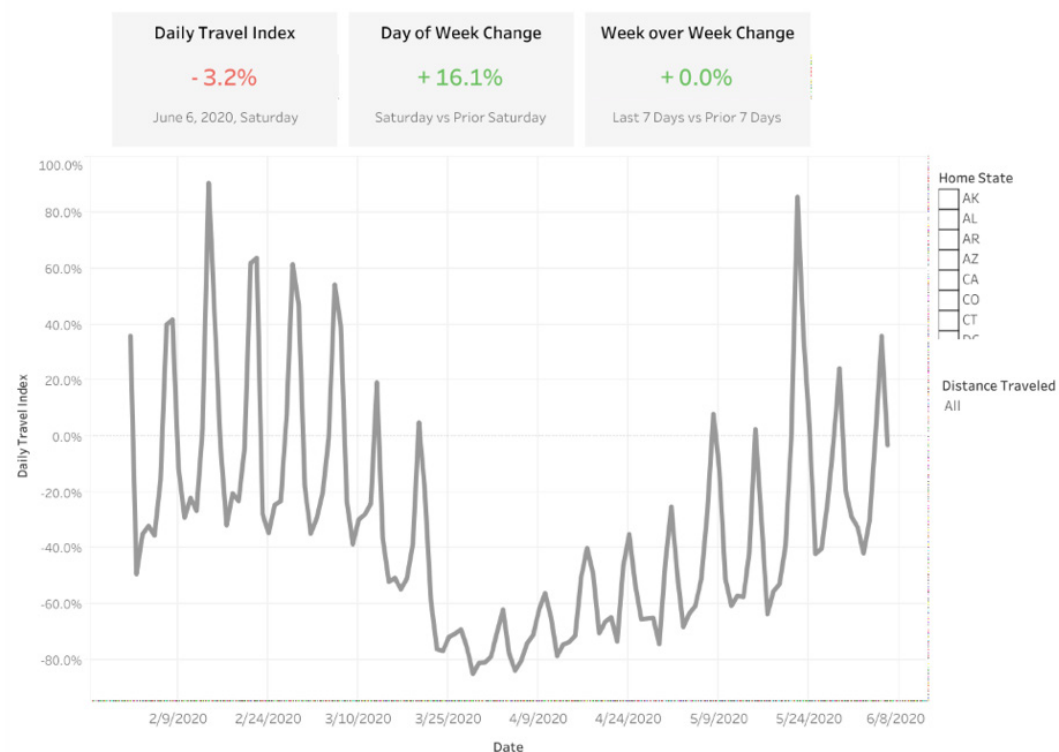


## How well are we physical distancing?

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.

- No changes were observed for average weekly trips of 50 miles or more compared to the prior week.
- May daily traffic compared to average daily traffic for month of February was down by 3.2%.

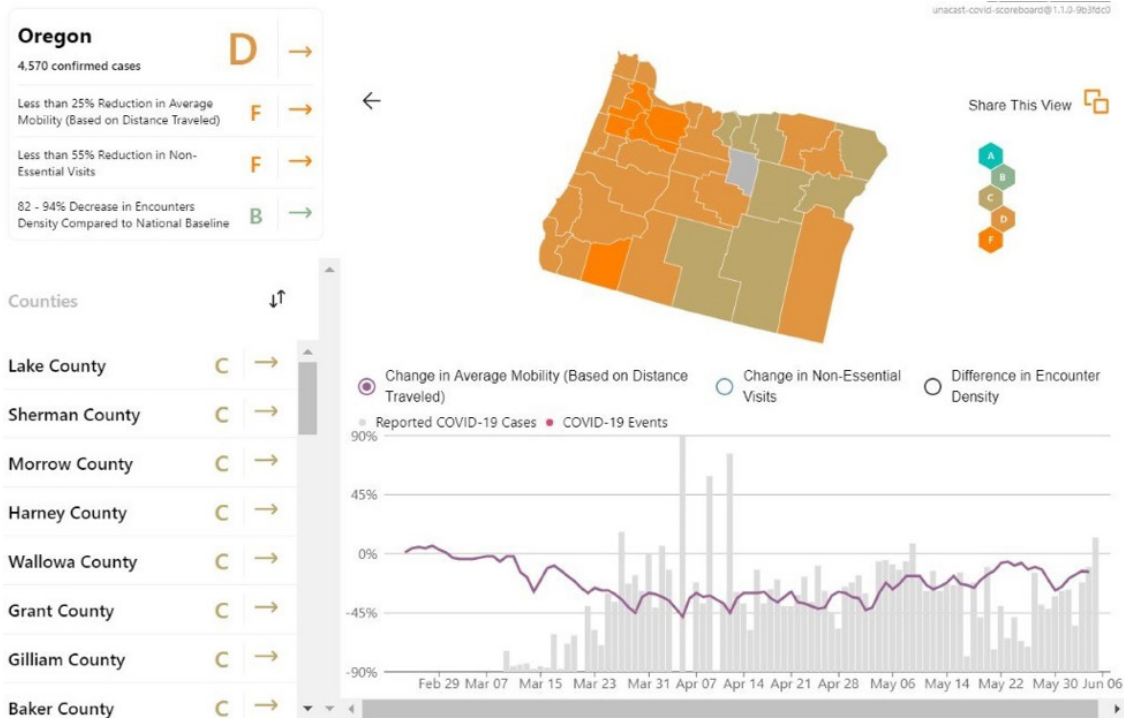
Arrivalist US Daily Travel Index



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: 06/06/2020

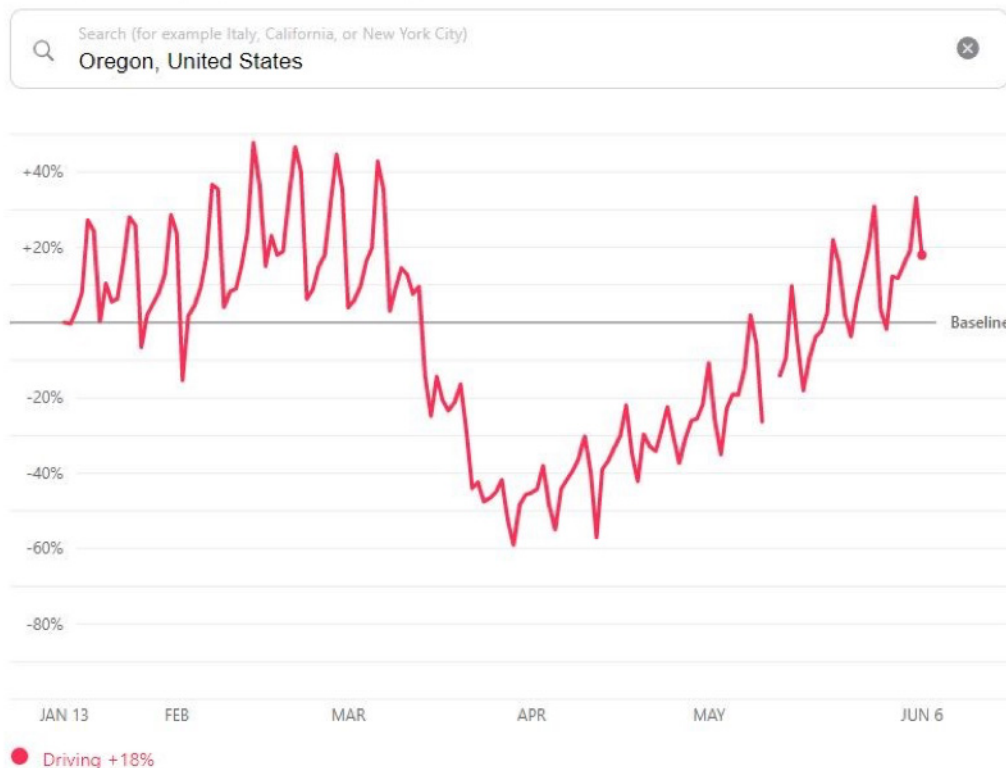
Unacast, a Norwegian company which collects and analyzes location data from various sources, released a study ranking all 50 states and the District of Columbia on a Social Distancing Scoreboard, updated daily, to empower organizations to measure and understand the efficacy of social distancing initiatives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

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



### Apple Mobility Trends

Change in routing requests since January 13, 2020



## National Trends

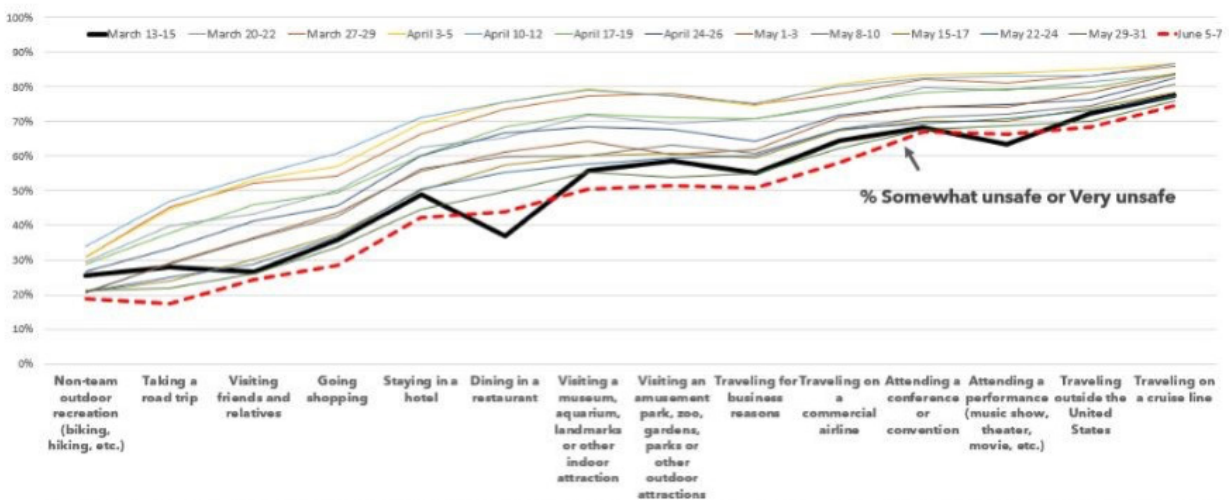
Destination Analysts: Update on Coronavirus' Impact on American Travel—Week of June 8th

### Key Findings to Know:

- American travelers' feelings about their health, financial and travel safety continue to improve.
- More Americans report they are already traveling or ready to travel.
- 70 percent will take at least one leisure trip in the remainder of 2020. Younger travelers —those in the Millennial and GenZ generations—and travelers in the Southern U.S. continue to be most excited to travel in the next month and open to travel inspiration.
- Over three-quarters (76.4%) have a developed sense of where and when their next leisure trip will take place and the majority say there is little chance of cancellation.
- 40 percent say their next road trip will take place this Summer.
- Safety considerations are still important to travelers' decision-making, from the destination they choose to visit to the hotels they select. The majority of American travelers continue to opt for beach, outdoor and rural type experiences for their next leisure trips.
- For their research and planning of this next trip, American travelers are now largely looking directly to travel providers and travel content producers rather than sources like the CDC.
- Younger generations are likelier to use a diverse set of social media and digital tools for their trip research, while Baby Boomers are more likely to concentrate their travel research activity on web searches.
- Four in ten conventions/conference travelers would be happy to attend a convention in the Fall.

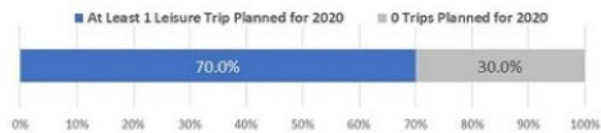
### Perceived Safety of Travel Activities: March 15<sup>th</sup>-June 7<sup>th</sup>

Question: At this moment, how safe would you feel doing each type of travel activity?

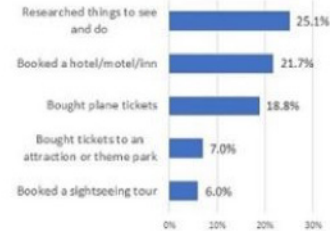


(Base: All respondents; 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

## AMERICAN TRAVELERS' NEXT LEISURE TRIP (AS OF JUNE 8<sup>TH</sup>, 2020)



## TRIP PLANNING ACTIONS COMPLETED



### Tourism Economics (June 4th report)

Tourism Economics shows a week-by-week outlook on travel spending in the U.S.

- National weekly travel spending grew by 15% to \$4.3 billion last week (its highest level since March), but remains severely depressed at about 20% of the average level seen in the weeks leading up to the pandemic
- Since the beginning of March, the COVID-19 pandemic has resulted in over \$215 billion in cumulative losses for the U.S. travel economy
- The number of states with weekly losses of less than 80% has expanded to 32 states with Mississippi and Alabama featuring losses of less than 70%
- The gains for the week ending May 30 were more evenly distributed across the country than in previous weeks, though the Northeast had been lagging as other regions improved; however, all Northeast states experienced moderate gains
- The continual depressed level of travel spending has caused a loss of \$27.5 billion in federal, state, and local tax revenue since March 1
- This includes \$17.0 billion in federal taxes, \$6.3 billion in state taxes, and \$4.1 billion in local tax revenue

### Longwoods International (May 27th)

- For the first time since March 11, less than half of American travelers say that the coronavirus pandemic will greatly impact their travel plans in the next six months:
- 47% indicated this on May 27, compared to a peak of 67% on April 1
- Most American travelers do not yet feel safe traveling outside their communities or opening their communities to visitors, but there has been an increasing share of those who do:
  - o 43% of American travelers feel safe traveling outside their communities, up from 35% two weeks earlier
  - o 40% support opening their communities to visitors, up from 31% two weeks earlier

## **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](mailto:ladan@traveloregon.com)

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