

Impact of COVID-19 on Travel Industry

July 27, 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.

STR Weekly Data (Week of July 12)

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.



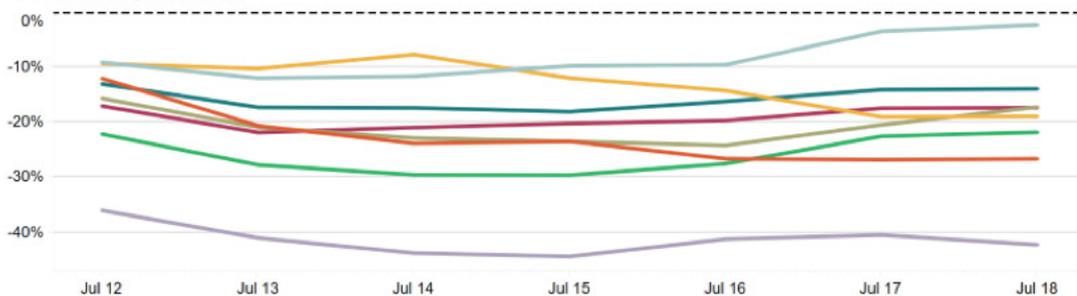
Weekly STR Report 2020 vs 2019 (July 12 to July 18)

Region
All

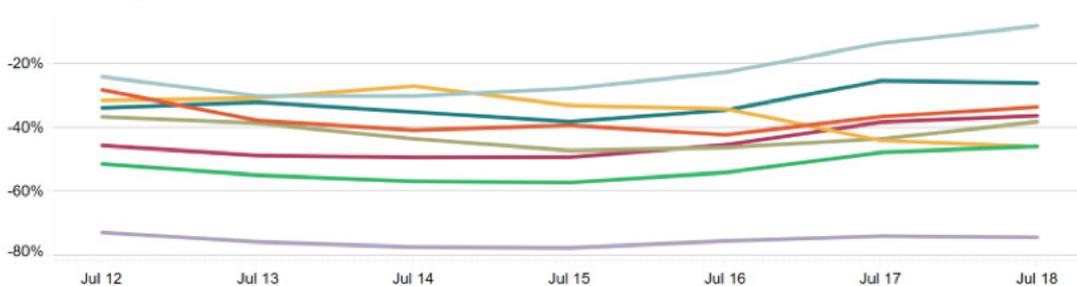
	ADR			RevPAR			Occupancy		
Oregon	\$109.52	\$147.63	-25.8%	\$59.35	\$124.54	-52.3%	53.8%	84.1%	-36.1%
Central	\$141.51	\$184.58	-23.3%	\$101.31	\$160.89	-37.0%	70.8%	86.2%	-18.1%
Coast	\$133.99	\$145.52	-7.9%	\$90.94	\$115.07	-21.0%	66.5%	78.4%	-15.5%
Eastern	\$85.72	\$98.92	-13.3%	\$47.96	\$75.25	-36.3%	55.9%	75.5%	-25.6%
Hood/Gorge	\$113.01	\$142.46	-20.7%	\$70.22	\$121.39	-42.1%	61.8%	84.6%	-26.9%
Portland	\$97.44	\$166.45	-41.5%	\$37.50	\$153.11	-75.5%	38.5%	91.8%	-58.1%
Southern	\$92.24	\$109.42	-15.7%	\$59.24	\$86.98	-31.9%	64.0%	79.3%	-19.5%
Willamette Valley	\$95.23	\$117.85	-19.2%	\$51.71	\$92.98	-44.4%	54.0%	78.7%	-31.6%

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

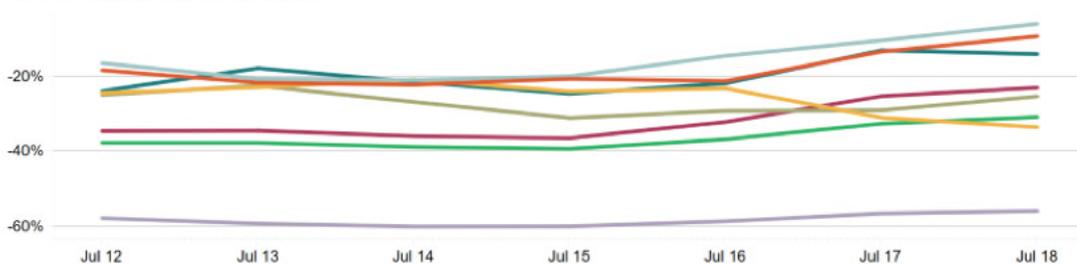
YOY Change in ADR



YOY Change in RevPAR



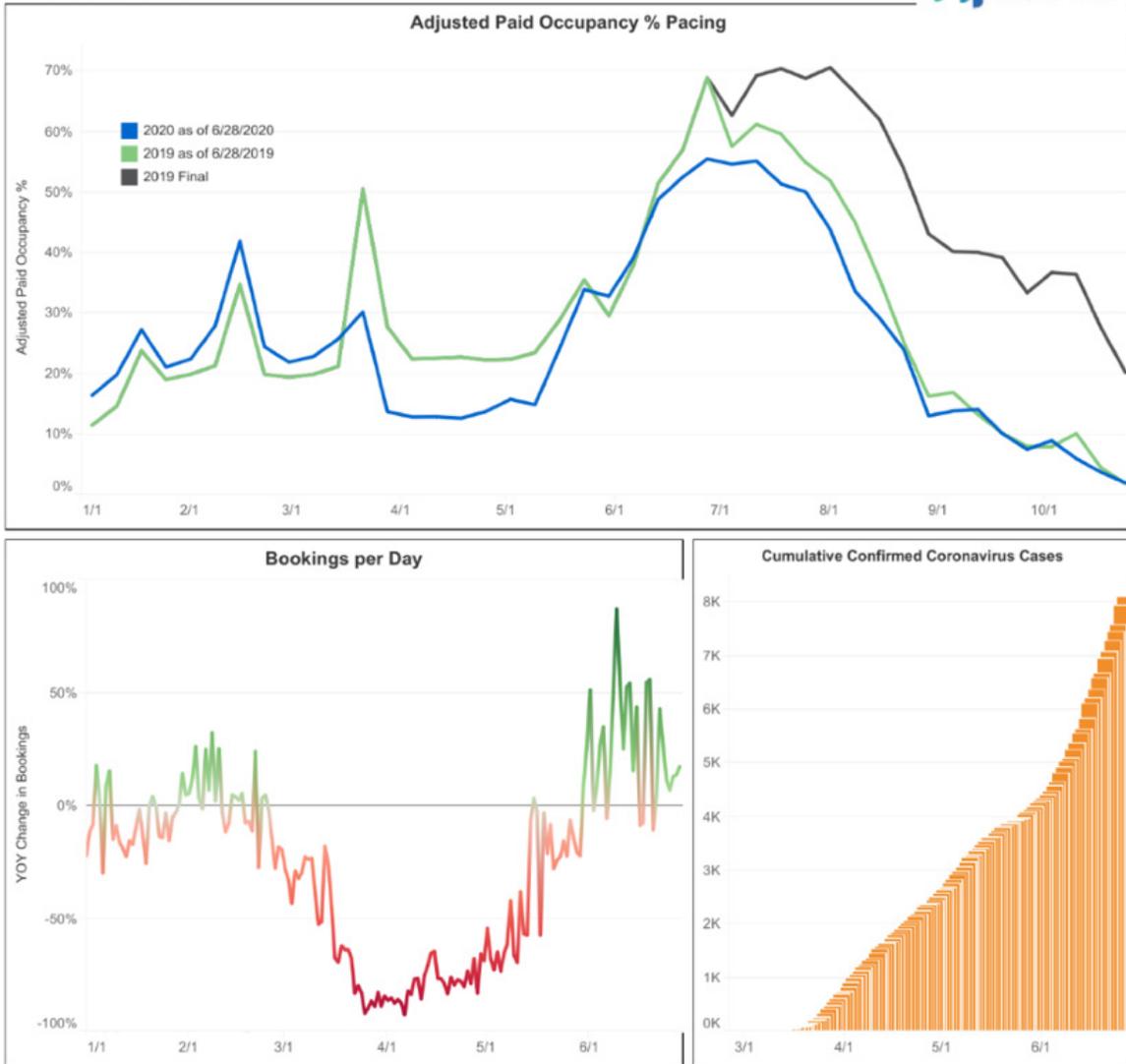
YOY Change in Occupancy



Vacation Rentals

Oregon - Pacing and Booking Activity

updated June 29, 2020



Social Sentiment & Hot Topics

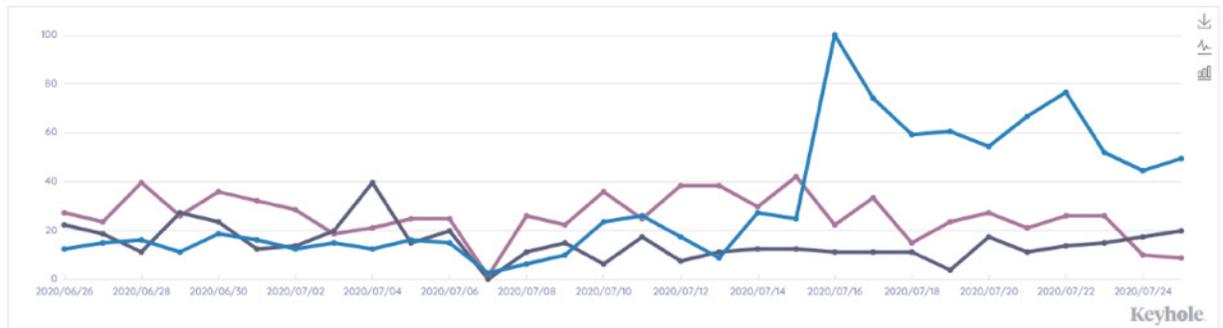
We're approaching 16.5 million cases worldwide with 6.5 million deaths worldwide; in the U.S., we have surpassed 4.2 million cases with 146,700 deaths nationwide according to the latest [Johns Hopkins data](#).

The U.S. now regularly records more than 60,000 coronavirus infections per day and logged its 4 millionth case on Thursday (July 23). The latest forecast from health experts also estimate that the [outbreak is](#) "shifting north and toward the coasts," settling into a new normal of rolling hotspots and infections plateauing at an "unmanageably high rate."

OHA reports that in Oregon, as of Sunday we have had 16,758 cases with deaths approaching 300.

Interest Over Time

Indexed to 100 at Peak



Analytics

Topic	Posts	Users	Reach
Portland	76.3K	52.7K	488.8M
#COVID-19	62.5K	59.6K	356.8M
#blacklivesmatter	36.1K	35.0K	84.8M

As we hit 60 straight days of protests in Portland, nationally, the conversation about Oregon focusses squarely on social justice protests.

Nightly episodes featuring a cast of memorable characters such as the "[Wall of Moms](#)," "[Wall of Veterans](#)," "[Athena](#)" and "[Riot Ribs](#)," and a tried-and-true script of mostly peaceful protesters followed up by violence after 11 p.m., followed by the deployment of tear gas and arrests by federal officials have prompted these protests to eclipse both #COVID-19 and #blacklivesmatter conversations.

Emerging narratives are:

- Portland is a test case (and election year ploy) by the Trump Administration in their efforts to flex their "law and order" mantra across cities run by "liberal Democrats" including Baltimore, Chicago and New York.



Donald J. Trump
@realDonaldTrump

The "protesters" are actually anarchists who hate our Country. The line of innocent "mothers" were a scam that Lamestream refuses to acknowledge, just like they don't report the violence of these demonstrations!

- Black leaders saying that their movement is being [co-opted by a "white movement,"](#) with Portland NAACP President E. D. Mondainé calling the nightly routine a "[white spectacle.](#)" Following these reports, the Wall of Moms announced that all white admins and leaders in the group [relinquished their role and transferred it to Don't Shoot PDX.](#)
- Mayor Wheeler himself [got into the fray](#) on Wednesday night, attending the nightly protest hosting a "listening session" and staying late into the night before being hit by tear gas himself. President Trump and DHS both made statements about the Mayor standing up with "rioters" instead of "peaceful protesters."

- Zooming in on COVID-19 and Oregon the leading conversation was around Governor Brown's press conference last week [announcing new restrictions](#) to curb the spread by reducing indoor capacity to 100 and closure of bars and restaurants by 10 p.m. Key words in stories and social posts about the COVID-19 spread in Oregon are featured below:



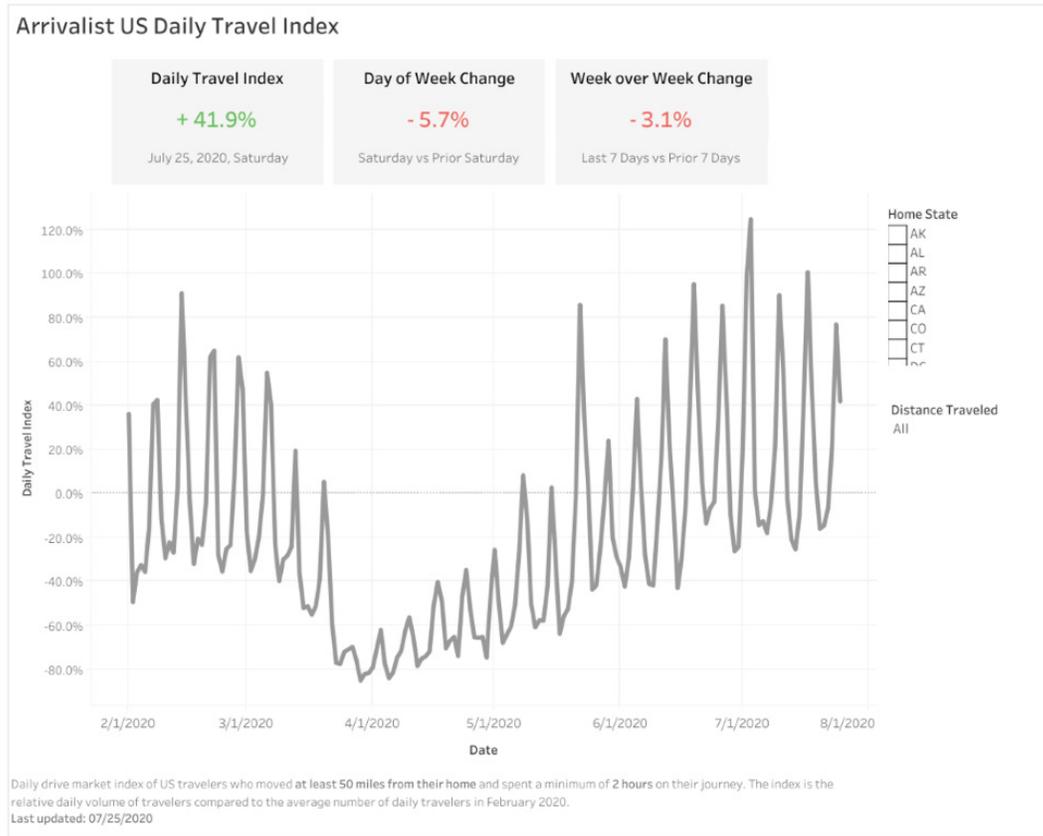
Other Hot Topics:

- First-time jobless claims [rose again to 1.4 million](#) last week and a staggering total of nearly 32 million receiving jobless benefits. That is about 20 percent of the entire U.S. job market.
- Congressional Democrats and Republicans are working on competing stimulus bills to boost individuals and entities during the prolonged economic downturn. [While they are about 3 trillion apart currently](#), both sides are committed to unemployment benefits, back-to-work tax credits, K-12 education cash and liability overhaul.
- Sinclair Broadcast Group (owner of KATU in Portland and KOMO in Seattle) asked [dozens of local affiliates](#) across the U.S. this weekend not to air a controversial interview conducted on its program "America This Week," which touted COVID-19 conspiracy theories that "Dr. Anthony Fauci started the coronavirus."
- As more people go outdoors for socially distant experiences, the need for a coordinated and consistent "responsible recreation" is even more important. Over the weekend, this tweet from @ForestServiceNW documenting bad behavior in the outdoors was widely shared and serves as another reminder of this.



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. In Oregon, trips of 50 miles or more were down 3.1% last week compared to prior week. July daily traffic compared to average daily traffic for month of February was up by 41.9%.



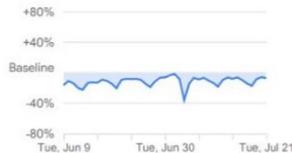
Google Mobility Trends (July 21)

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

Retail & recreation

-7%

compared to baseline

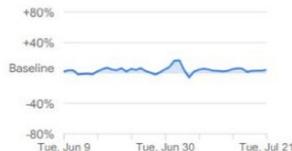


Mobility trends for places like restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters.

Grocery & pharmacy

+4%

compared to baseline



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

Parks

+147%

compared to baseline



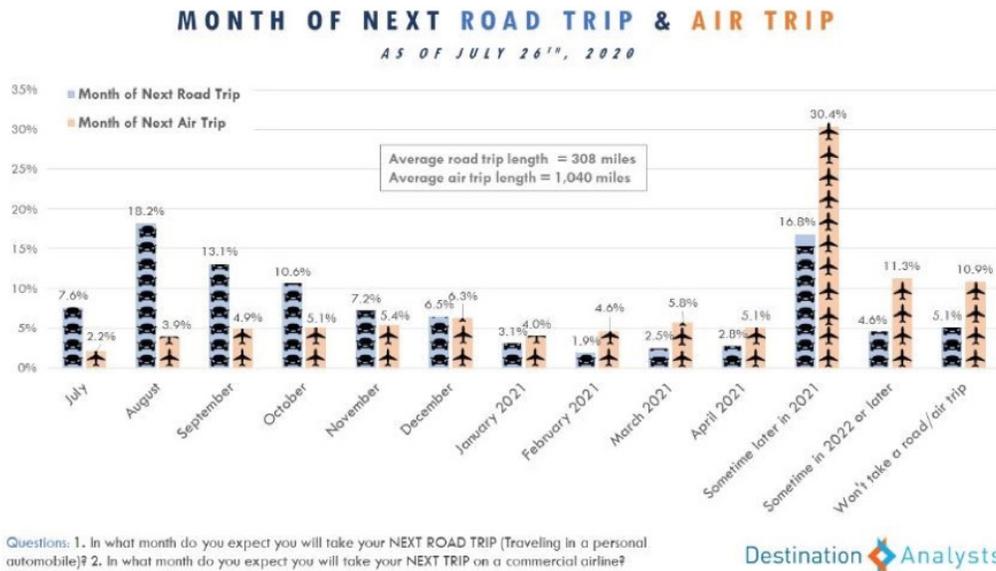
Mobility trends for places like national parks, public beaches, marinas, dog parks, plazas, and public gardens.

*The baseline is the median value, for the corresponding day of the week, during the 5- week period Jan 3–Feb 6, 2020.

National Trends

Destination Analysts (Week of July 27)

- A few important travel metrics positively increased this week: excitement for near-term travel, openness to travel inspiration, and the number who say they will take a trip in 2020.
- 18.2% of American travelers anticipate their next road will be in August.
- The profile of those that recently traveled by air skews younger, urban dwellers that typically traveled for business and conventions in the pre-pandemic period.
- Those that have recently traveled by air largely rate their experience with the health and safety protocols implemented by their airline and the airports as satisfactory.
- More Americans are now agreeing with pandemic etiquette and say they will practice it when traveling, including wearing a face mask.
- Nevertheless, the marked stress Americans are feeling during the pandemic remains a parasite on travel morale.
- Overall, half of American travelers agree they have lost their taste for travel for the time being—a feeling more pronounced in Baby Boomers and those in the West and Northeast.
- Looking at the anticipated timing of their next trips, 18.2% of American travelers expect they may take their next road in August.



Research and Analytics Resources

<https://www.qualityinfo.org/ed-ceest/?at=1&t1=4101000000~0~0~00000000~2020~or>

<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