

Impact of COVID-19 on Travel Industry

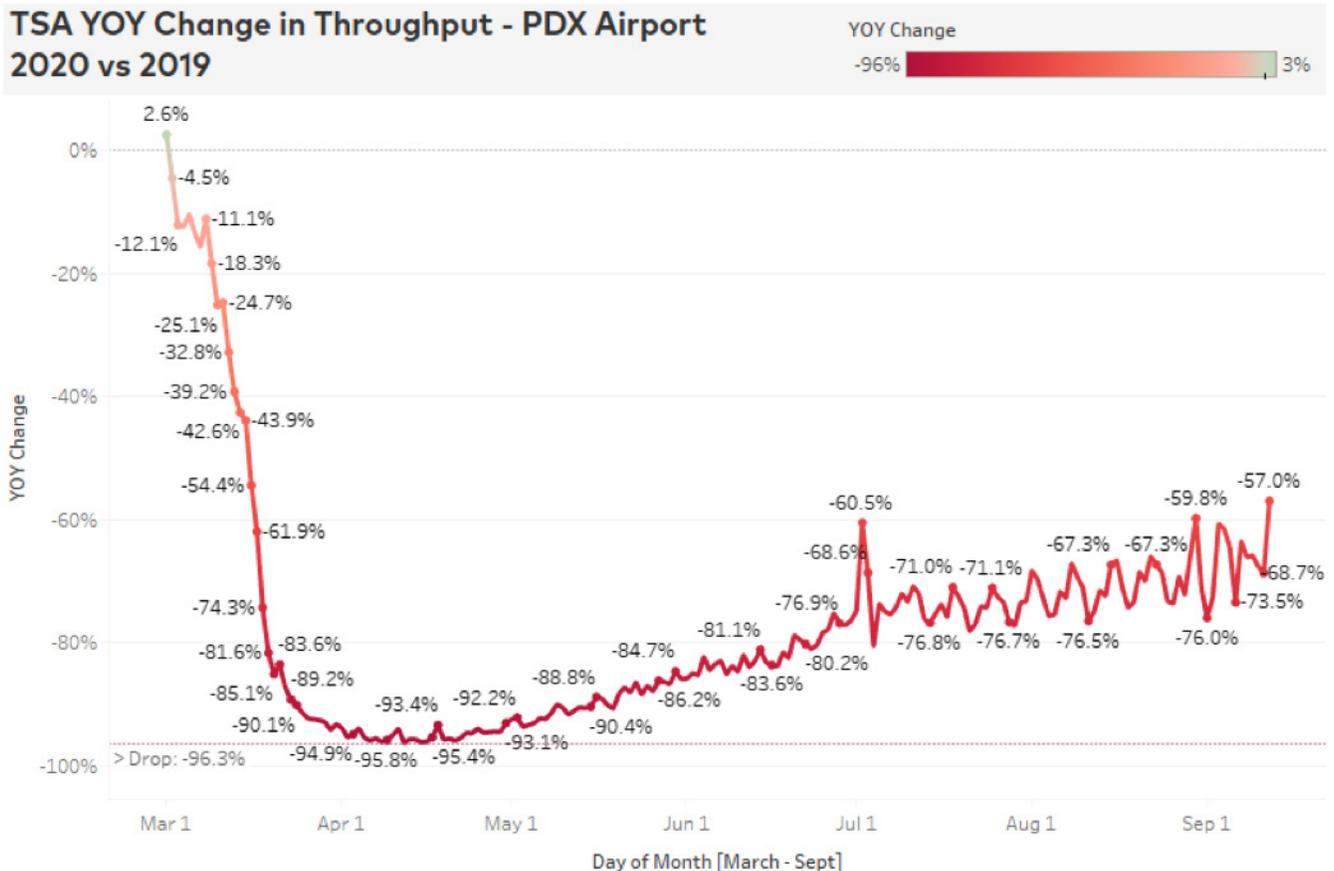
September 15, 2020

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.

PDX Airport Data

The TSA reported 9,692 passengers utilized the checkpoints on Saturday, an increase of 2,018 over the previous Saturday. However, for the 5th time since March, throughput has exceeded the 10K mark (9/7 = 10,648). This is our highest throughput since 3/16. August to date is down 71% YOY (923K vs 270K).

**TSA YOY Change in Throughput - PDX Airport
2020 vs 2019**



Social Sentiment + Hot Topics

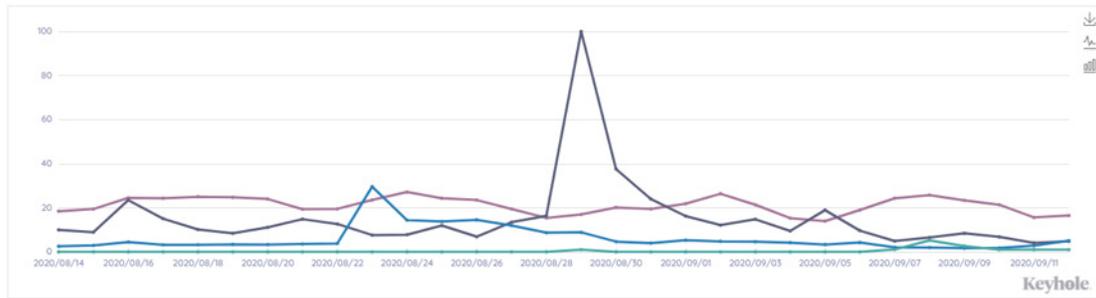
The information provided below is a summary of national coverage, media trends and what people across the U.S. are sharing online. The statements do not represent Travel Oregon's views or agency position.

Extreme winds last weekend, in combination with high temperatures and dry conditions ignited more than 45 large wildfires and burned through more than a million acres (double the annual average) of beautiful Oregon in just a single week.

This as we reached the grim milestone of nearly 30,000 infections and 500 deaths from COVID-19. As *Buzzfeed* put it, the historic wildfire event was a terrible way to end our "[summer of discontent](#)."

Based on the trends and sentiments below, Travel Oregon's channels will continue to amplify public safety information from first responders along with relief efforts and showcase how Oregonians are banding together to help these communities.

Interest Over Time
Indexed to 100 at Peak



Analytics

Topic	Posts	Users	Potential Impressions
#covid-19	17.6M	15.4M	256.1B
portland	12.7M	10.5M	59.1B
#blacklivesmatter	5.1M	4.8M	17.7B
#oregonfires	296.2K	290.5K	490.8M

Interestingly, while national attention on Portland was intense just two weeks ago when protests gripped the city, statewide fires did not result in the same amount of attention.

Within Oregon however, the fire was a major story, with folks sharing information on the spread of the fire and smoke conditions, information about evacuation centers, ways to help fire victims, expressing gratitude towards firefighters and other first responders.

Local journalists—despite having to evacuate themselves—are producing some of the most compelling coverage, with real time updates via Twitter coupled with harrowing stories of survival, loss, and also resiliency. A few examples:

- [A father’s desperate attempt to save his family](#)
- [Cowgirl 911 network helps rescue local animals](#)
- [The story of the McKenzie Valley fire chief who lost her own home as she battle to save her community](#)
- [How the Beachie Creek Fire ravaged the Santiam Canyon](#)
- [Eagle Creek homeowners who stayed back to fight the fires on their own](#)
- [OPB science reporter Erin Ross’ Twitter thread diving into forest management and fire mitigation practice](#)

Additionally, first responders also had to contend with a “wave of misinformation” spreading across neighborhood Facebook groups and on far-right websites that antifa activists were setting the blazes.

Scott Stoddard @scottstoddard
Yesterday was a day and a half. I was in Cave Junction in the morning, Eagle Point in the midday and Phoenix in the afternoon. Look for our coverage in today's edition of the Daily Courier.



12:24 PM · Sep 10, 2020 · Twitter for iPhone

Beth Nakamura @bethnakamura · Sep 11
Amid staggering catastrophe, people are everywhere helping people. At a Holiday Farm fire evacuation site, a few dressed up as characters to comfort & entertain children. I'm writing it up, here's a peek 🙌
#OregonFires



0:29 73.9K views

Beth Nakamura @bethnakamura · Sep 11
"People need to know that there's brighter days ahead." Superman said, "and that we can get through this together if we try hard enough."
#OregonFires2020 #oregonfires



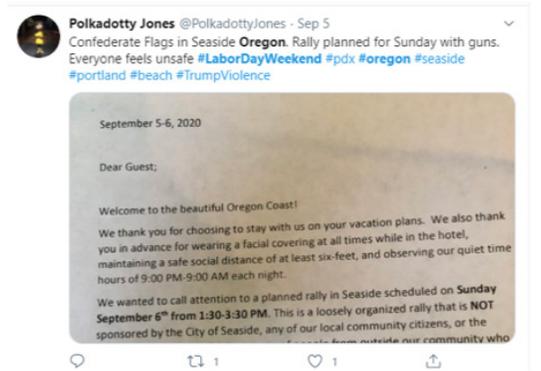
Superheroes emerge at Holiday Farm fire evacuation site, offering hope ...
Superheroes emerge at an evacuation site near the Holiday Farm fire, offer hope to children
@oregonlive.com

The rumors resulted in the [Portland FBI](#) office along with [Jackson County Sherriff's Office](#) and [Medford Police Department](#), having to issue statements discrediting these rumors, on Sept. 10 and 11. Despite this, the rumors persisted and resulted in reports of [armed locals](#) staffing illegal checkpoints to keep looters and would-be arsonists out. Facebook and Twitter didn't start removing the misinformation [until Saturday](#).

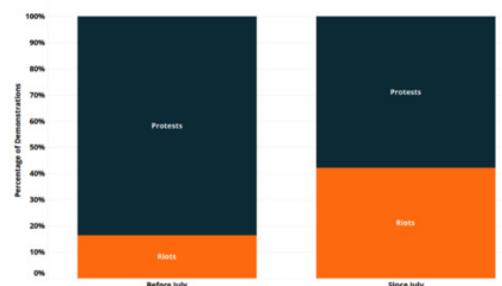


Other noteworthy topics:

- Impacts of social justice protests and perception of safety was a trending topic prior to wildfires:
 - o Governor Brown long with a host of community leaders and elected officials called for the end to violence following the shooting death of a Patriot Prayer member by an antifa activist.
 - o Jason Brandt from ORLA was featured in this KGW story focused on [perceptions of downtown Portland's safety](#), saying that protests were impacting businesses downtown more than COVID-19.
 - o There were [tensions in Seaside](#) over the Labor Day weekend and hotel guests were alerted about a rally by activists who openly carried and displayed Confederate flags along the Prom.
 - o Portlanders also marked the [100th day of protests](#) on Saturday, Sept. 5th with speeches and marches that ended with a riot declaration and 59 arrests following a throwing of a Molotov-cocktail at police after protesters were blocked from marching from Ventura Park to East Precinct headquarters. This was followed by a mostly peaceful day [on Sunday](#).
 - o A [report](#) by the Armed Conflict Location & Event Data Project (ACLED) analyzing Black Lives Matter protests finds that "93% of demonstrations have involved no serious harm to people or property." The report also calls out Portland stating that violence escalated after the federal operation saying: "Prior to the (federal) deployment, over 83% of demonstrations in Oregon were non-violent. Post-deployment, the percentage of violent demonstrations has risen from under 17% to over 42%."



Percentage of Demonstrations Associated with Black Lives Matter (BLM) in Oregon by Demonstration Type (24 May - 22 August 2020)



- COVID-19 topics:

- o Despite efforts to keep travelers local during the Labor Day weekend, trails and roads were busy that weekend.
- o The IHME model at the University of Washington, one of several used by the White House, is now [projecting](#) 410,451 deaths from COVID-19 in the U.S. by [Jan. 1, 2021](#). Additionally, Dr. Fauci predicts that [we won't return to normal until late 2021](#).
- o The US Looks to [lose \\$155 billion](#) without international tourism 2020 according to World Travel & Tourism Council.
- o [Child care crisis pushes US mothers out of the labor force](#) with the federal jobs reports showing that "women in their prime-earning years — 25 to 54 — were dropping out of the work force more than other age groups."



STR Weekly Data (Week of August 30th)

- In comparison with the same week in 2019, the Oregon hotel performance recorded the following:
 - Occupancy: -15.1% to 57.2%
 - ADR: -10.6% to US\$110.17
 - RevPAR: -24.3% to US\$64.09
- Central and Southern Oregon are the regions with highest occupancy for the week. Central and Southern Oregon occupancy came in at 70.5% & 70.7%, 0.5% & 2.0% higher than the comparable week in 2019.
- Central Oregon and Oregon Coast have surpassed US\$98.80 RePAR, about 6% more than the comparable week in 2019.
- Portland is still showing the lowest occupancy (43.6%), ADR (US\$93.84), and RevPAR (US\$41.10).



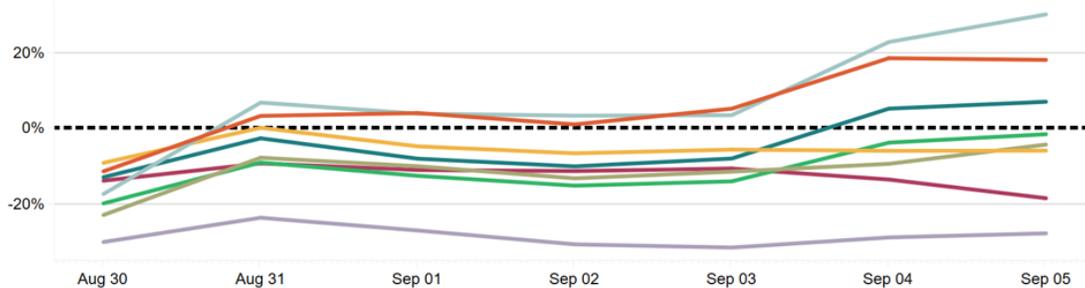
Weekly STR Report 2020 vs 2019 (August 30 to September 5)

Region
All

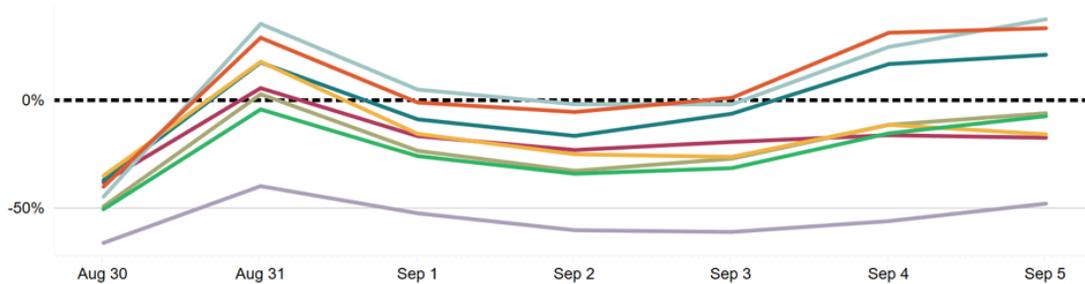
	ADR			RevPAR			Occupancy		
Oregon	\$110.17	\$123.25	-10.6%	\$64.09	\$84.70	-24.3%	57.2%	68.1%	-15.1%
Central	\$138.53	\$131.09	5.7%	\$99.82	\$94.13	6.0%	70.5%	71.1%	0.5%
Coast	\$142.32	\$132.05	7.8%	\$98.83	\$93.32	5.9%	67.2%	69.2%	-0.8%
Eastern	\$85.48	\$90.28	-5.3%	\$47.66	\$57.42	-17.0%	55.6%	63.3%	-11.0%
Hood/Gorge	\$114.60	\$129.15	-11.3%	\$72.06	\$91.89	-21.6%	61.8%	70.4%	-11.2%
Portland	\$93.84	\$131.21	-28.5%	\$41.10	\$91.75	-55.2%	43.6%	69.6%	-36.4%
Southern	\$95.54	\$99.55	-4.0%	\$68.48	\$69.81	-1.9%	70.7%	69.8%	2.0%
Willamette Valley	\$96.88	\$111.01	-12.7%	\$57.50	\$70.44	-18.4%	58.5%	62.5%	-5.6%

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

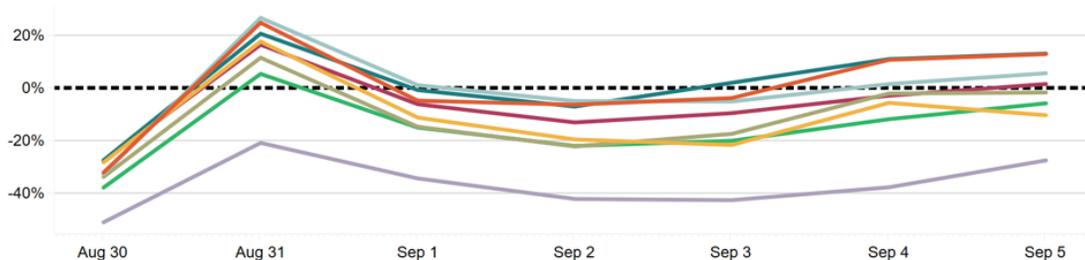
YOY Change in ADR



YOY Change in RevPAR



YOY Change in Occupancy

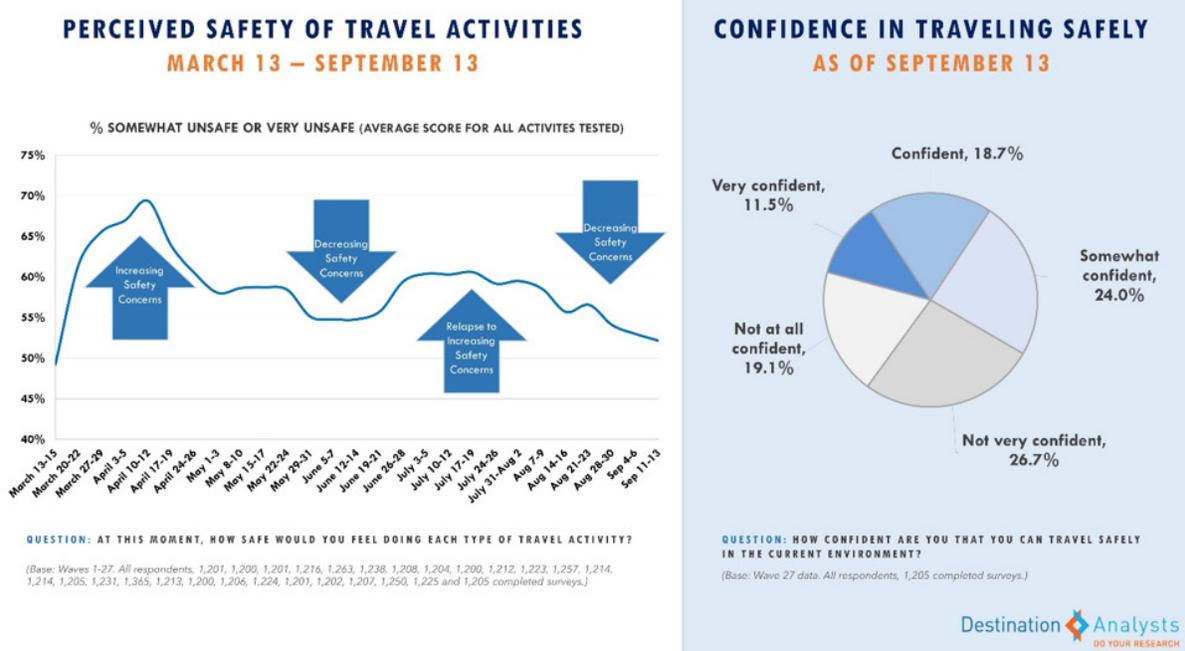


National Trends

Destination Analysts

Key Findings:

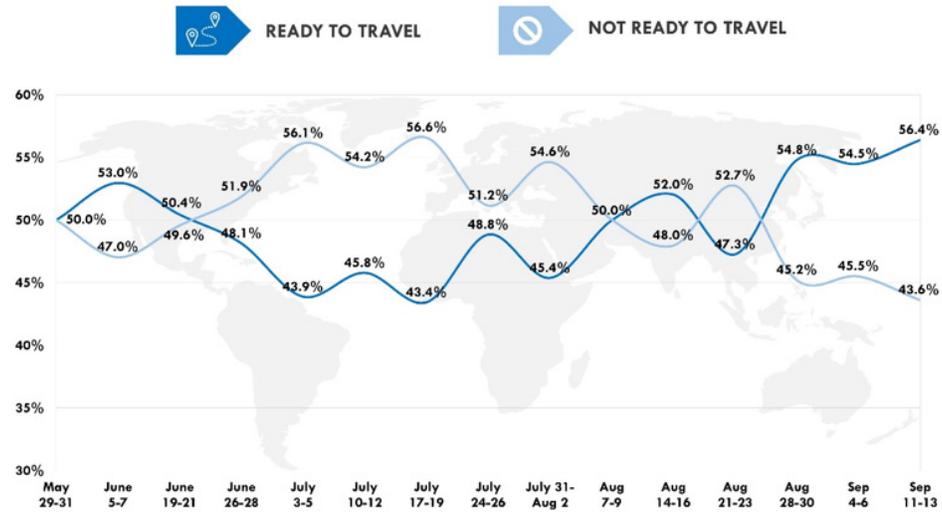
- The average rating of travel activities as "unsafe" continued to fall this week to the lowest levels they have been since March 15. Over 30.0% of American travelers are confident they can travel safely in the current environment, another 24.0% feel at least somewhat confident.



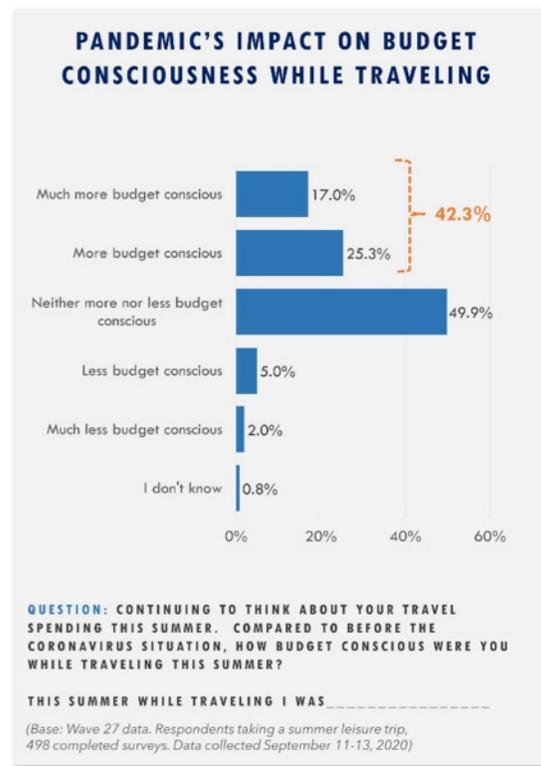
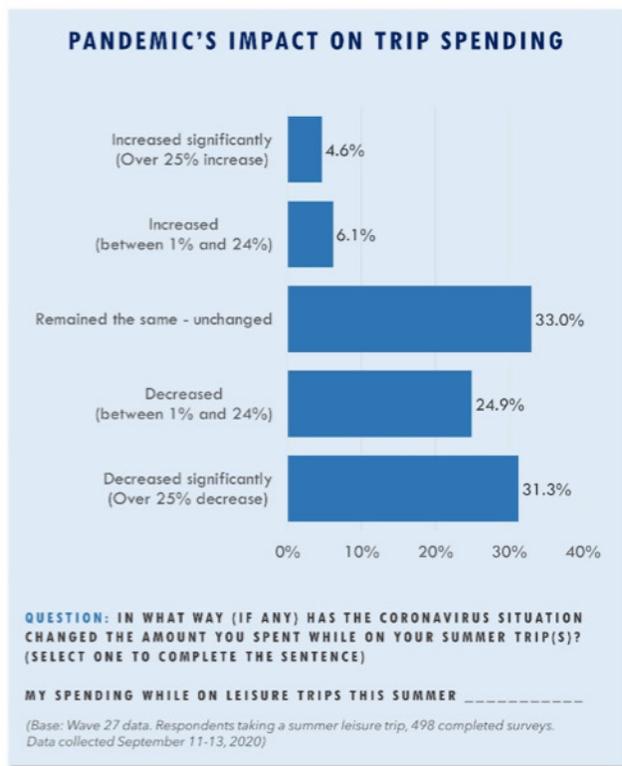
- There thus has been a measured rise in the number of American travelers who are planning travel: this week, 78.3% report they have at least tentative trip plans—up from 75% last week. In fact, 37.0% now agree they will be traveling this Fall season—up 5% from last week and returning to mid-June levels. Excitement to travel in the near-term and openness to inspiration continue to grow. Those in a "ready to travel" mindset is at a pandemic-period high.

AMERICANS' TRAVEL STATE-OF-MIND

MAY 29 – SEPTEMBER 13

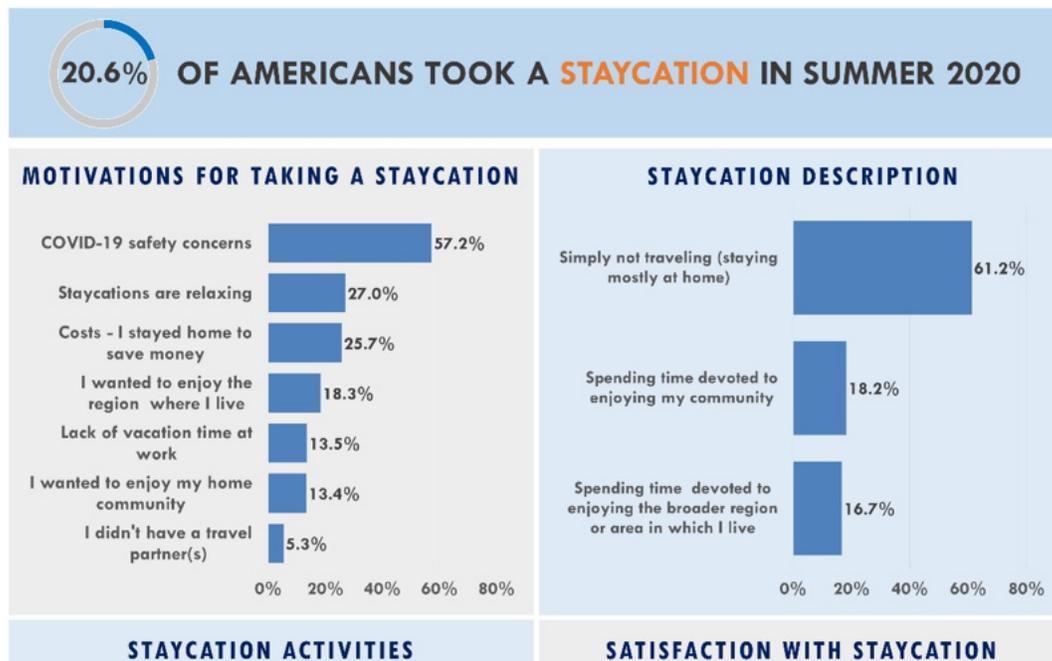


- Among those who traveled by commercial airline this past summer, 52.8% report feeling unsafe against COVID-19 at some point(s) during their flight. Such feelings were not as widespread while at lodging properties, but still 27.7% report feeling unsafe against the virus sometime during their stay. Summer travelers most commonly saw masked and gloved employees, floor markings and other encouragements for social distancing at the lodging properties they stayed at this summer, however there was less observation of some of the top protocols travelers expressed they wanted lodging properties to adopt in the wake of COVID-19, such as providing guests with well-explained cleanliness protocols, masks, wipes and sanitizer.
- While it is a positive sign for the travel industry that well over a third of American travelers took trips this past summer, the pandemic did appear to mute the economic impact potential of this travel. Trip activities seemed more limited or favoring free. Over 56.0% of these travelers said they decreased their spending on these trips to some degree, and 42.3% said they were more budget conscious.



- One-in-five of American travelers report taking a staycation this summer, primarily because of COVID-19 concerns (57.2%) rather than an affinity for them (27.0%) or budget reasons (25.7%). While over 60 percent said the staycation was mainly staying at home, two-thirds report doing at least one activity, such as day trips to area attractions (28.0%) and going to restaurants (26.5%).

HOW AMERICANS STAYCATIONED IN THE PANDEMIC SUMMER



Tourism Economics Weekly Analysis

Analysis by Tourism Economics shows a week-by-week outlook on travel spending in the U.S. The analysis also looks at regional and state-by-state breakdowns. Findings from the September 10 report:

Labor Day Weekend provided a helpful boost, as travel spending grew 18% following two months of modest growth

- In the week ending September 5, travel spending tallied \$15.4 billion—the largest one-week increase since May when lockdown measures began easing. Nevertheless, travel spending was 30% below last year's levels (a \$6.7 billion loss)
- August's final tally of \$44.0 billion in travel spending losses is a 14% improvement over the \$51.2 billion in losses seen in July and the best month since the onset of the pandemic
- Every state enjoyed a double-digit percentage gain in weekly travel spending
 - The number of states posting weekly losses of less than 40% increased from 28 states to 39 states
- Louisiana experienced a 10% year-over-year increase in travel spending and Mississippi only saw a single-digit percentage decline from the prior year, although these gains are tied to increased hotel demand related to displacements and evacuations from recent hurricane
- Despite the positive effects of the holiday Weekend, Puerto Rico, Washington, D.C., New York and Hawaii continued experiencing losses exceeding 50%
- Since the beginning of March, the COVID-19 pandemic has resulted in over \$367 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$47.1 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.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