

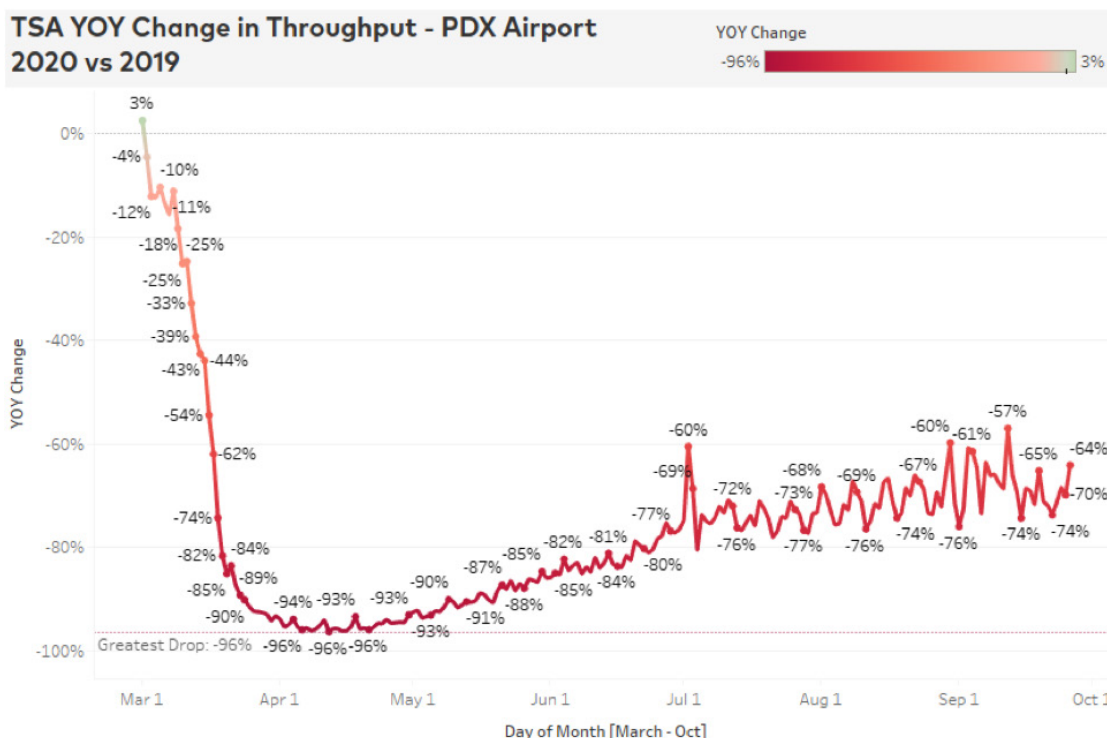
# Impact of COVID-19 on Travel Industry

September 29, 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 7,749 passengers utilized the checkpoints on Saturday, a decrease of 133 over the previous Saturday. Throughput for September is going to be below that of August so our throughput numbers have started their seasonal downward trend. Good news is that this descent is a month later than usual. September to date is down 68% YOY (694K vs 220K).



## STR Monthly Data (Month of August)

- In comparison with the same month in 2019, the Oregon hotel performance recorded the following:
  - Occupancy: -29.6% to 56.7%
  - ADR (Room rate): -19.1% to US\$117.23
  - RevPAR: -43.1% to US\$76.48
- Oregon is outperforming US and Pacific NW.

OREGON LODGING STATISTICS August 2020 (Month)								
Region	Occupancy (%)	Room Rate (\$)	RevPAR (\$)	Room Supply	Room Demand	Room Revenue (\$)		
	Month % Chg	Month % Chg	Month % Chg	Month % Chg	Month % Chg	Month % Chg	Month % Chg	Month % Chg
United States	48.6 (31.7)	102.46 (22.8)	49.83 (47.3)	160,960,277 (3.0)	78,282,873 (33.8)	8,020,493,841 (48.9)		
Pacific	52.6 (34.8)	123.19 (32.7)	64.82 (56.2)	22,037,063 (8.3)	11,596,373 (40.2)	1,428,510,789 (59.8)		
Statewide	56.7 (29.6)	117.23 (19.1)	66.48 (43.1)	2,045,380 (3.2)	1,159,932 (31.9)	135,980,634 (44.9)		
Eastern	55.8 (23.1)	86.29 (9.5)	48.16 (30.4)	146,630 0.0	81,846 (23.1)	7,062,383 (30.4)		
Central	73.4 (10.7)	155.70 (9.8)	114.27 (19.4)	184,419 2.7	135,349 (8.2)	21,073,881 (17.2)		
Southern	68.0 (9.9)	95.75 (10.4)	65.12 (19.3)	266,786 0.0	181,432 (9.9)	17,372,066 (19.3)		
Willamette Valley	56.2 (24.2)	98.39 (16.6)	55.27 (36.8)	324,539 (1.8)	182,300 (25.5)	17,936,284 (37.9)		
Mt Hood/Gorge	63.8 (22.5)	122.26 (13.9)	77.99 (33.3)	71,455 4.2	45,584 (19.2)	5,572,938 (30.5)		
Portland Metro	40.8 (52.3)	95.44 (39.2)	38.98 (71.0)	706,521 (8.9)	288,582 (56.6)	27,542,755 (73.6)		
Coast	71.8 (12.1)	157.27 (2.8)	112.97 (14.6)	341,000 0.1	244,951 (12.0)	38,522,316 (14.5)		

Source: STR

## STR Weekly Data (September 13 to 19)

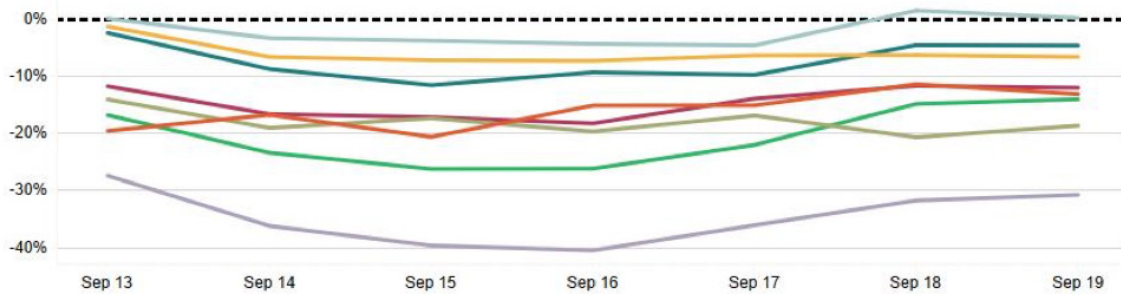
- In comparison with the same week in 2019, the Oregon hotel performance recorded the following:
  - Occupancy: -20.4% to 61.1%
  - ADR: -20.6% to US\$103.44
  - RevPAR: -36.8% to US\$63.28
- Oregon Coast, Southern Oregon and Willamette Valley are the regions with highest occupancy for the week.



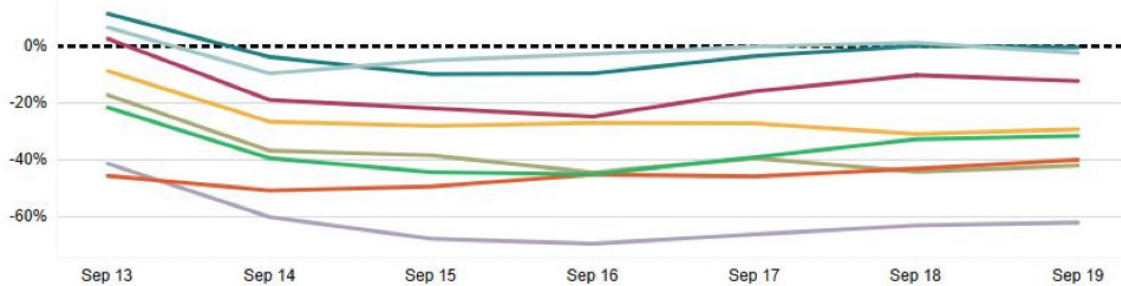
### Weekly STR Report 2020 vs 2019 (September 13 to September 19)

	ADR			RevPAR			Occupancy		
Oregon	\$103.44	\$130.28	-20.6%	\$63.28	\$100.16	-36.8%	61.1%	76.7%	-20.4%
Central	\$111.68	\$132.85	-15.9%	\$58.75	\$107.54	-45.4%	52.3%	80.9%	-35.3%
Coast	\$122.76	\$125.14	-1.9%	\$94.37	\$96.18	-1.9%	76.3%	76.3%	0.0%
Eastern	\$84.27	\$89.64	-6.0%	\$44.74	\$60.56	-26.1%	53.1%	67.4%	-21.2%
Hood/Gorge	\$103.49	\$126.40	-18.1%	\$56.86	\$92.38	-38.5%	54.8%	72.7%	-24.6%
Portland	\$96.97	\$149.11	-35.0%	\$45.18	\$120.22	-62.4%	46.6%	80.2%	-41.9%
Southern	\$93.94	\$101.39	-7.3%	\$71.83	\$73.84	-2.7%	76.4%	72.7%	5.1%
Willamette Valley	\$98.00	\$114.57	-14.5%	\$73.55	\$86.57	-15.0%	74.7%	75.3%	-0.7%

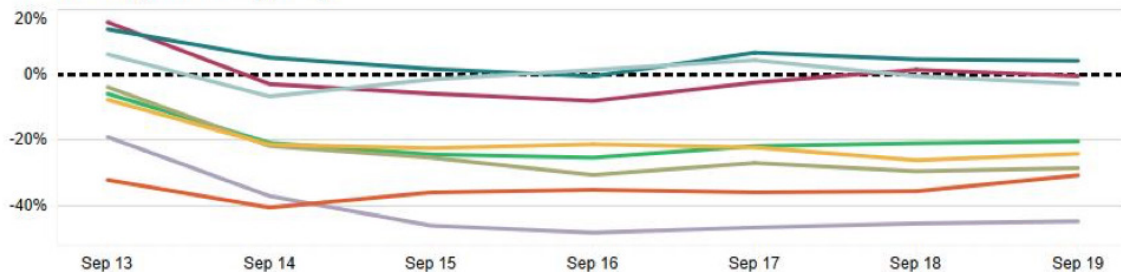
#### YOY Change in ADR



#### YOY Change in RevPAR



#### YOY Change in Occupancy



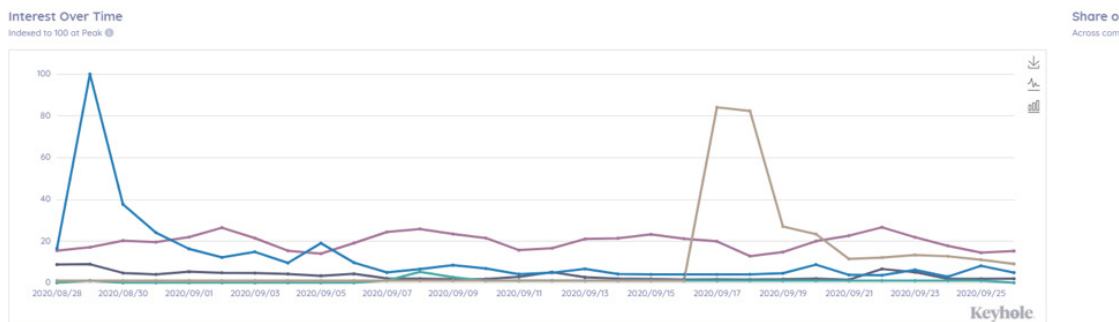
## Social Social Sentiment + Hot Topics

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.

It has been three weeks since the Labor Day weekend and the surge in new cases we feared going into the holiday [nationally](#) and Oregon is unfortunately here.

Nationally, daily case counts are [up 23% from two weeks ago](#) (43,111 cases per day now versus 37,332 cases per day). In Oregon, OHA reported its [highest daily case count](#) (457) since the pandemic began on Sept. 25.

As we hit another grim milestone of 200,000+ deaths nationwide (equivalent to the [population of Eugene](#)), it is not surprising that COVID-19 remains the most talked about subject we are tracking. The only exception was a dramatic rise in conversations between Sept. 18-21 when our collective attention (yellow) focused on death of Supreme Court Justice Ruth Bader Ginsberg.



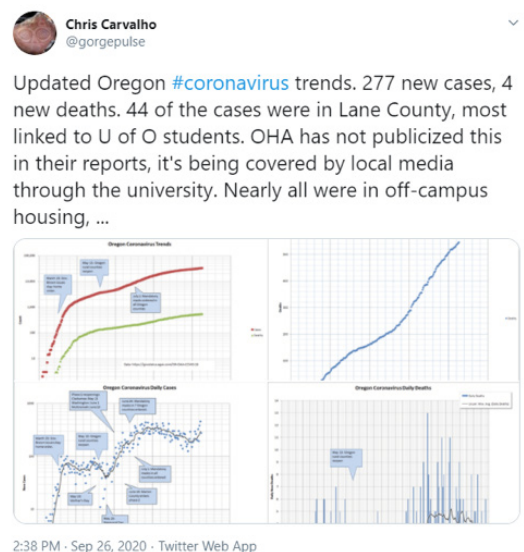
Topic	Posts	Users	Potential Impressions
#covid-19	16.3M	14.1M	234.8B
portland	10.1M	8.6M	44.3B
ginsburg	8.0M	7.2M	64.6B
#blacklivesmatter	2.8M	2.6M	12.4B
#oregonfires	365.4K	356.3K	795.2M

### Topics driving coverage in/or about Oregon include:

- [Off-campus gatherings at UO and OSU](#) were called out for being potential sources for the spread of COVID-19 in Oregon.
- 7 counties (Clackamas, Grant, Harney, Hood River, Lake, Linn and Wheeler) potentially being allowed [to offer in-person classes](#).
- 77 workers at Pacific Seafood Company [testing positive](#).

### Other COVID topics:

- The IHME model from University of Washington now predicts that [death toll from the virus](#) "could almost double by Jan. 1," to approximately 371,000.
- The CDC this week reported that [vast majority of children dying](#) from COVID-19 in the U.S. are Hispanic, Black and/or Native American.





- According to the [Oregon Office of Economic Analysis](#), video lottery sales are almost back to pre-pandemic levels; in addition, dining out and mobility patterns are following national trends after a dip due to wildfires.

## #OregonFires Updates:

As the wildfires that raged across the state went into increasing levels of containment, it remained a top story in Oregon with folks sharing stories of survival, resilience, community, and devastation.

Some of the most shared stories on social include:

- Oregon man survives by [sheltering on a rock in the river](#); fending embers with a plastic chair and drinking a bottle of Rolling Rock he found.
- Silver Falls State Park was [mostly unscathed](#) from the wildfires.
- Lloyd's of London paying up to [\\$25 million in wildfire costs](#) (Nearly 4,000 shared on Facebook!)
- The story of how ODFW [release of 1.2 million chinook, steelhead and trout from hatcheries](#) as the fires raged.
- [Baby Yoda cheers firefighters.](#)
- [Eagle Creek restaurant dishes free meals to first responders and firefighters.](#)
- Drew Barrymore [donates \\$10,000](#) towards Chief Rainbow Plews from McKenzie who lost her own home while fighting the McKenzie fire.



Amid the stories of recovery and hope however, there are lingering questions about the [performance of firefighters](#) in Estacada and [role of power lines](#) in the devastating fires that destroyed towns in the Santiam Canyon.

Senators Wyden and Merkley are promising an investigation into the issue.

## Social Justice Protests:

After a brief hiatus due to wildfires and smoke conditions, social justice protests returned to Portland this past week. During the pause, some protest medics and others directed their attention [towards wildfire relief](#).

Most of the attention this past week was centered around fears of clashes between conservative Proud Boys and counter protesters in North Portland, after a protest with reportedly [10,000 was planned near the historic Vanport area](#).

Governor Brown [declared a state-of-emergency](#) for the weekend and handed response responsibilities to the Oregon State Police and Multnomah County Police.

However, only around 500 conservative protesters showed-up and the events on Saturday, Sept. 26 remained peaceful.

The [Portland Mercury featured an extensive play-by-play](#) using social media accounts to showcase what happened on Saturday.

Saturday night, however, was a different story. More than 30 arrests were made as police tried to disperse a crowd after objects were thrown at them.

Clips posted on social media showed police using force against journalists and protesters and Governor Brown has asked for an investigation.

Fun fact: Jim Belushi was [spotted](#) in crowd downtown!

Some other interesting stories shared:

- Texts reveal that [right-wing activists plotted violence in Portland](#).
- [Roots of the brawls](#) between opposing activists in Portland.
- Portland NAACP leader Dr. Mondaine says protests [may last for years](#).



## National and International Trends

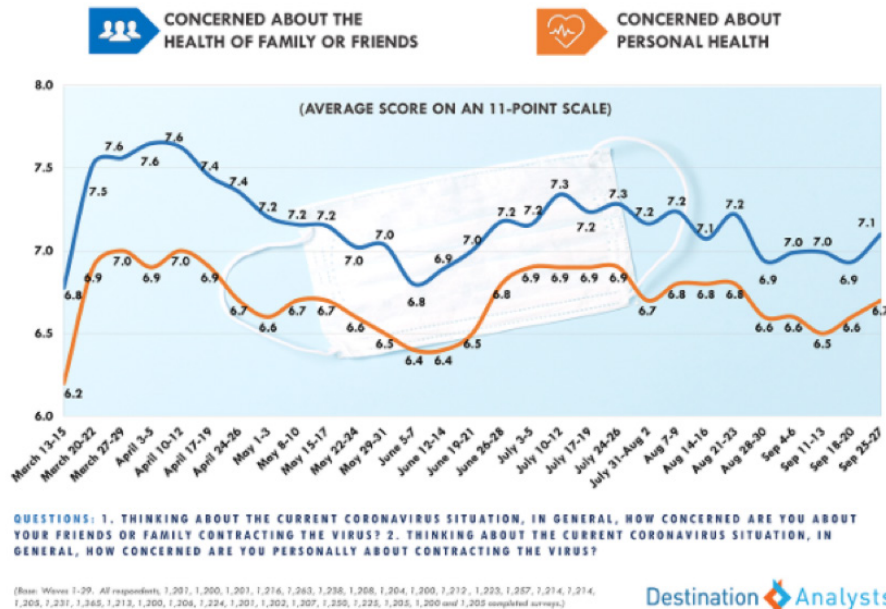
### Destination Analysts

#### Key Findings:

- After a month-long period of relatively lower levels of anxiety, the number of Americans with high degrees of concerns about contracting the coronavirus rose this week. Similarly, after a stable period in expectations for the virus' course, the percent of Americans who feel things will get worse in the U.S. in the next month increased.

### HEALTH CONCERNS: PERSONAL & FAMILY/FRIENDS

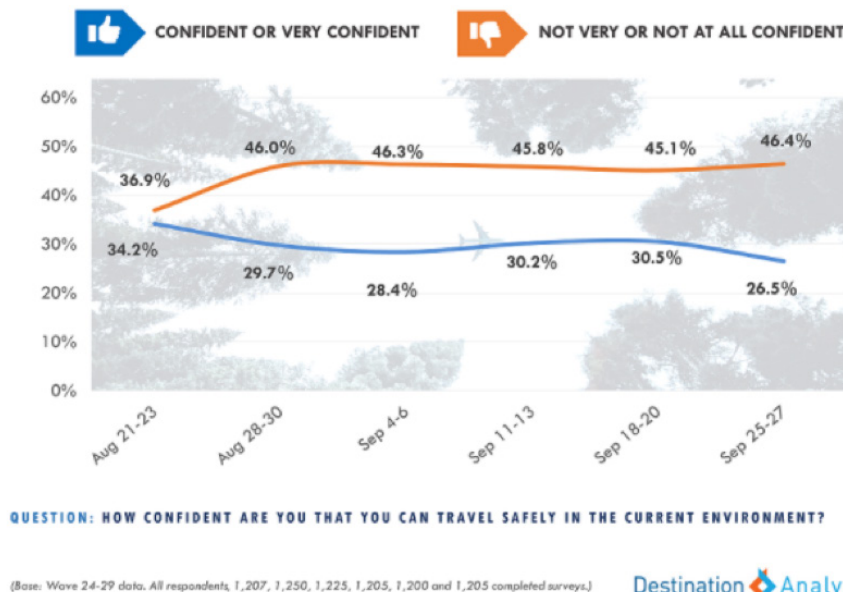
MARCH – SEPTEMBER



- These rising concerns appear to be affecting confidence that travel can be done safely and perceptions of travel. The percent in a "ready to travel" mindset fell to 52.2% after being above 54% for the last month.

### CONFIDENCE IN TRAVELING SAFELY

AUGUST 21 – SEPTEMBER 27

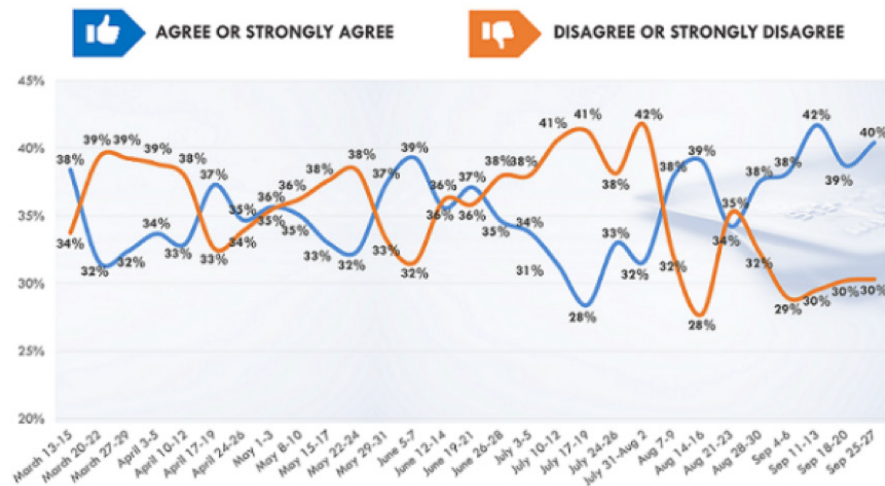




- Nevertheless, three-quarters of American travelers continue to report having at least tentative trip plans—primarily over the next 6 months—as well as exhibit a perception of travel as a means to meet their emotional needs. The percent that agree price cuts and discounts can motivate them to consider a new trip is as high as it has been during the pandemic.

## DISCOUNTS & PRICE CUTS AS A TRAVEL MOTIVATOR

MARCH – SEPTEMBER



**QUESTION: HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENT? "THE CORONAVIRUS HAS LED MANY TRAVEL PROVIDERS TO CUT THEIR PRICES. THESE DISCOUNTS AND PRICE CUTS (AIRLINE, HOTEL, ETC.) MAKE ME MORE INTERESTED IN TRAVELING IN THE NEXT THREE (3) MONTHS."**

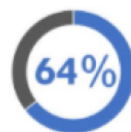
(Base: Waves 1-29. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,237, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,230, 1,225, 1,205, 1,200 and 1,205 completed surveys.)

**Destination Analysts**  
DO YOUR RESEARCH

- Looking at American travelers' specific expectations for Fall, nearly two-thirds expect to travel this season, and these travelers anticipate taking 1.7 overnight trips on average. The top motivations for these Fall trips are relaxation, spending time with family and escapism, although younger travelers are also likely to be seeking connecting with nature and having new experiences.

## FALL TRAVEL EXPECTATIONS

(AS OF SEPTEMBER 28<sup>TH</sup>, 2020)



Of American Travelers Expects to Take a Trip this Fall



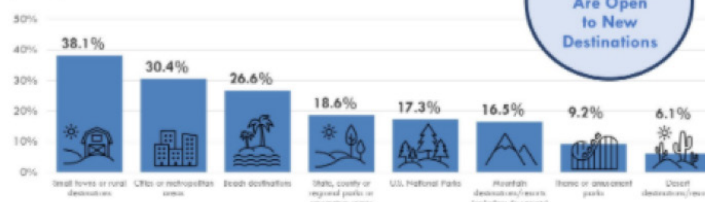
These Travelers Plan to Take 1.7 Overnight Trips this Fall



Will Travel by Airplane



### LIKELY TRIP DESTINATIONS



**50%**  
Are Open to New Destinations

- Nearly 40% of likely Fall travelers say they will visit a small town or rural area on their Fall trips, with beach visitation less likely than in the summer months and urban travel increasing.

- Interest in workcations among those who can work remotely and schoolcations among parents who travel with children is at similar levels—just under half have a more elevated degree of interest. In total, 52.2% of those interested in schoolcations reported some likelihood to take one this Fall, while 46.0% of those interested in workcations said they were likely to actually take one in these coming months.
- American travelers' comfort with enjoying their own communities for leisure activities and having tourists visit their regions are at pandemic period highs.

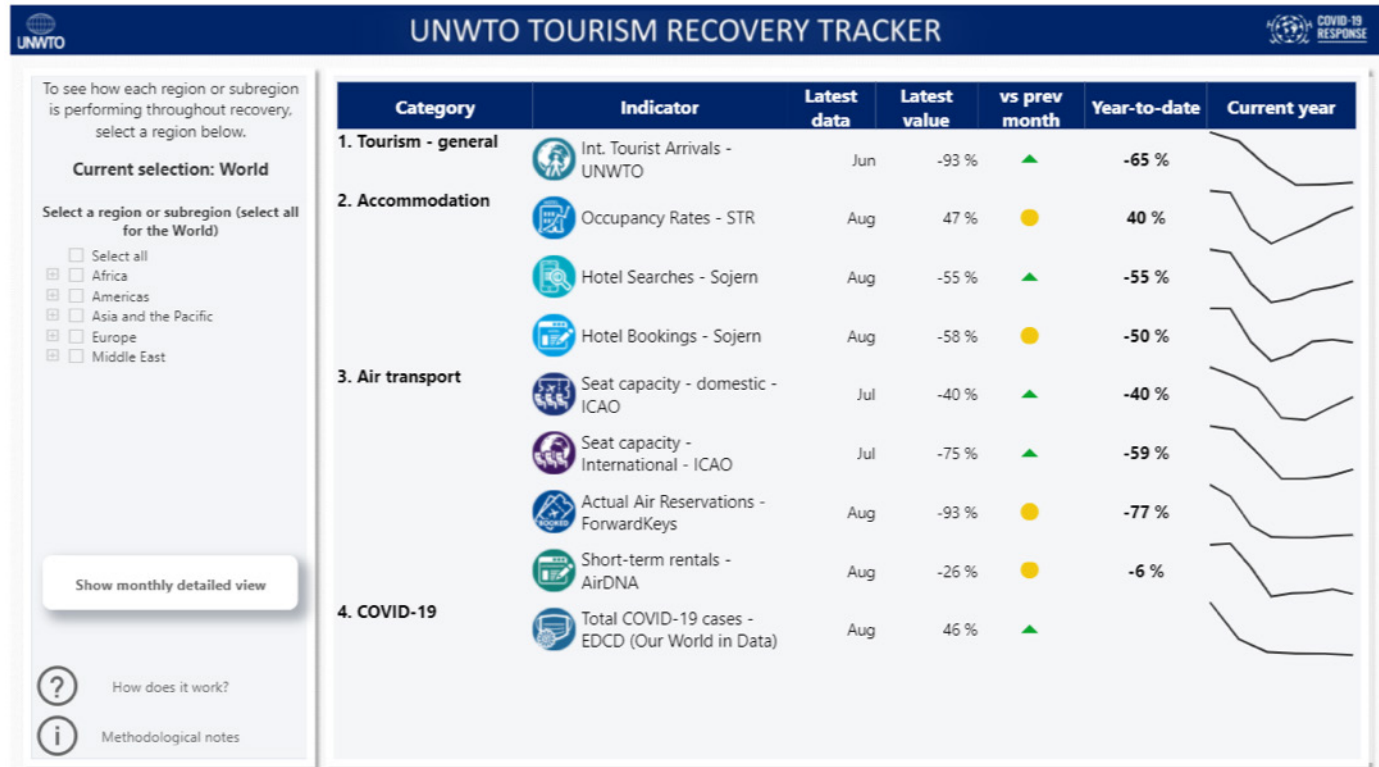
### **Tourism Economics weekly outlook on travel spending in the U.S.**

This analysis looks at regional and state-by-state breakdowns. Findings from the September 24 report:

- Travel spending shrank by 5% last week—continuing the downward trend following Labor Day Weekend—as the shift from the summer travel season has left the travel industry more exposed to the virtual absence of business and group travel
  - In the week ending September 19, travel spending tallied just \$12.1 billion, reflecting a 45% drop below last year's levels (a \$10 billion loss); this is significantly worse than the 30% drop two weeks ago
    - The number of states and territories experiencing losses exceeding 50% increased from six to nine, with Vermont, Connecticut, Washington, and Rhode Island joining, and Puerto Rico improving beyond this threshold
    - The New England subregion contracted significantly with every state experiencing at least a five-percentage point decline. New Hampshire suffered the largest year-over-year (y/y)
    - California, Oregon and Washington felt the effect of twin tragedies from the ongoing pandemic and West coast wildfires, as the Pacific subregion saw travel spending fall 10% from the prior week
  - Since the beginning of March, the COVID-19 pandemic has resulted in over \$386 billion in cumulative losses for the U.S. travel economy
  - The continual depressed level of travel spending has caused a loss of \$49.6 billion in federal, state and local tax revenue since March 1



## UNWTO launches comprehensive tourism recovery tracker



## 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.mmgglobal.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: [adan@traveloregon.com](mailto:adan@traveloregon.com)

