

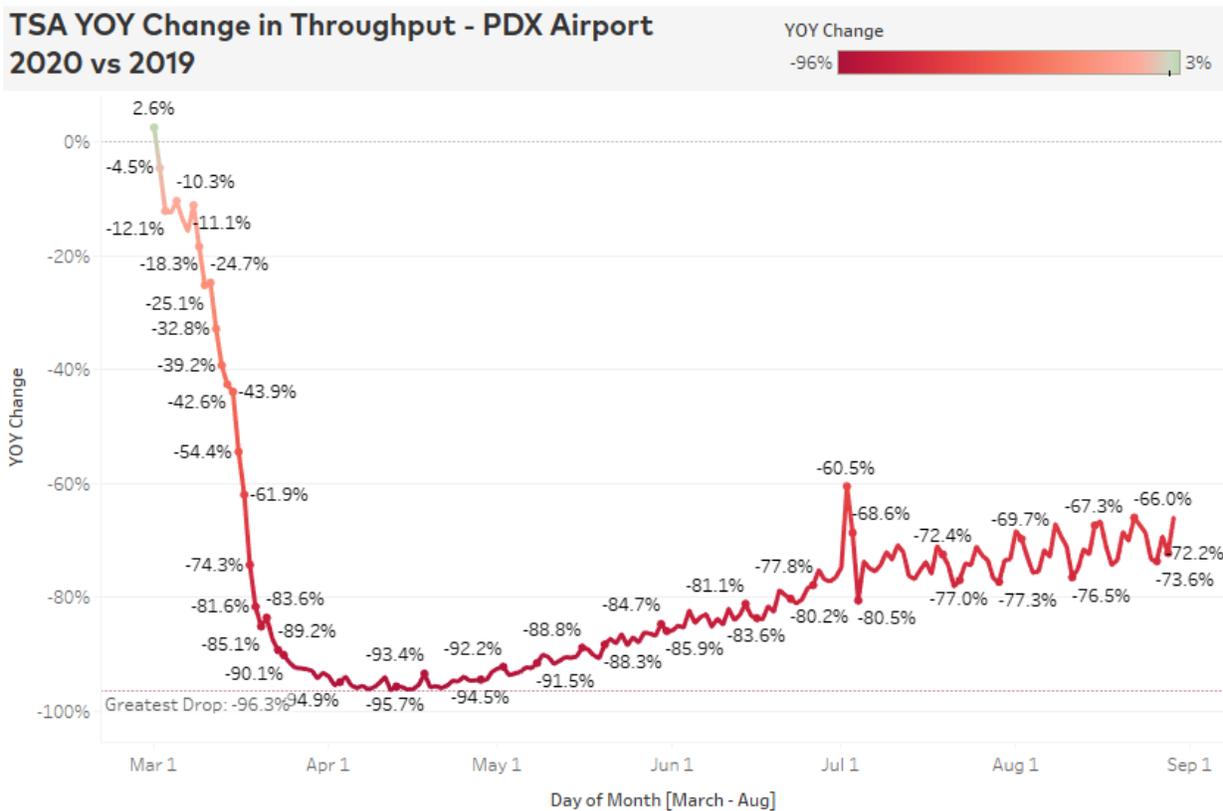
Impact of COVID-19 on Travel Industry

September 1, 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 7,733 passengers utilized the checkpoints on Saturday, a decrease of -710 over the previous Saturday. However, for the 3rd time since March, through put has exceeded the 10K mark (8/23 = 10,112). August to date is down 71% YOY (896K vs 252K). While the YOY percentages continue to rise slowly, the actual through put numbers have plateaued.



STR Weekly Data (Week of August 16)

Oregon hotel performance data for the week ending 22 August showed slightly higher occupancy, ADR, and RevPAR from the previous week. U.S. hotel occupancy decreases 2.7% week over week for the first time since mid-April. Reflective of school openings and less vacation travel. STR projects similar challenges with no corporate demand to replace leisure demand lost to the beginning of the school year.

- In comparison with the same week in 2019, the Oregon hotel performance recorded the following:
 - Occupancy: -26.8% to 58.1%
 - ADR: -18.6% to US\$115.53
 - RevPAR: -40.4% to US\$67.53
- Coast and Central Oregon have surpassed US\$150 ADR
- Portland is still showing the lowest occupancy (41.7%)



Weekly STR Report 2020 vs 2019

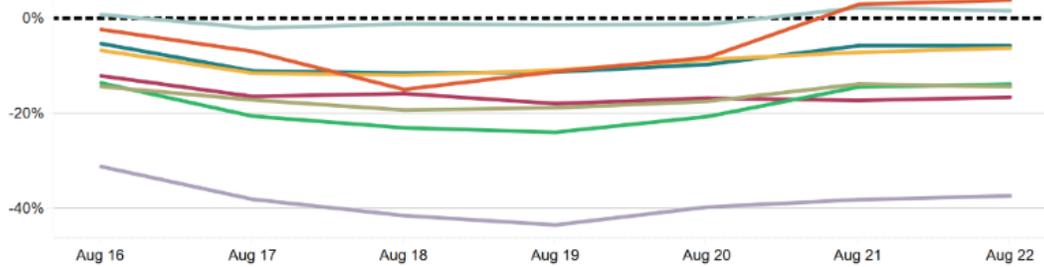
(August 16 to August 22)

Region
All

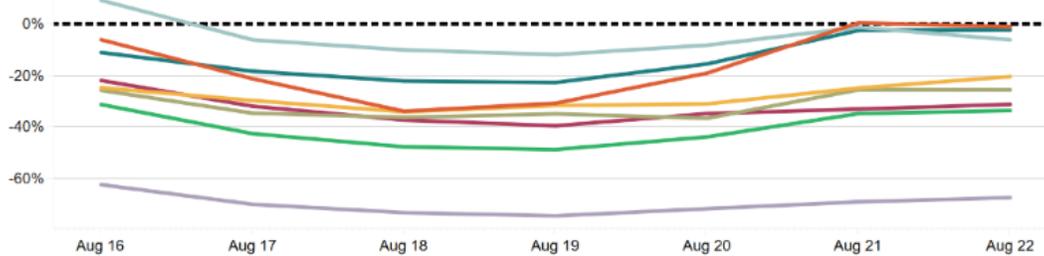
	ADR			RevPAR			Occupancy		
Oregon	\$115.53	\$141.85	-18.6%	\$67.53	\$113.36	-40.4%	58.1%	79.6%	-26.8%
Central	\$151.78	\$160.01	-5.1%	\$111.75	\$132.24	-15.5%	72.8%	82.5%	-11.6%
Coast	\$154.78	\$154.95	-0.1%	\$119.62	\$125.95	-5.0%	76.6%	80.7%	-4.6%
Eastern	\$85.51	\$94.02	-9.1%	\$47.94	\$66.76	-28.2%	56.0%	70.9%	-20.8%
Hood/Gorge	\$116.20	\$138.91	-16.3%	\$76.40	\$110.69	-31.0%	65.3%	79.4%	-17.7%
Portland	\$95.52	\$155.52	-38.6%	\$39.81	\$133.05	-70.1%	41.7%	85.2%	-50.9%
Southern	\$96.68	\$105.83	-8.7%	\$66.52	\$76.69	-13.3%	68.5%	72.3%	-5.3%
Willamette Valley	\$97.80	\$116.67	-16.2%	\$58.12	\$86.87	-33.1%	59.1%	74.0%	-19.8%

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

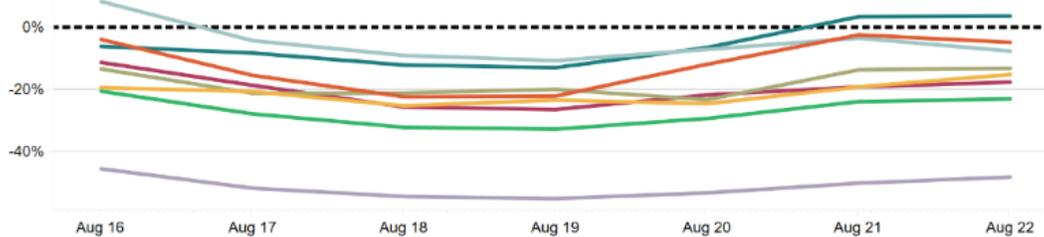
YOY Change in ADR



YOY Change in RevPAR



YOY Change in Occupancy

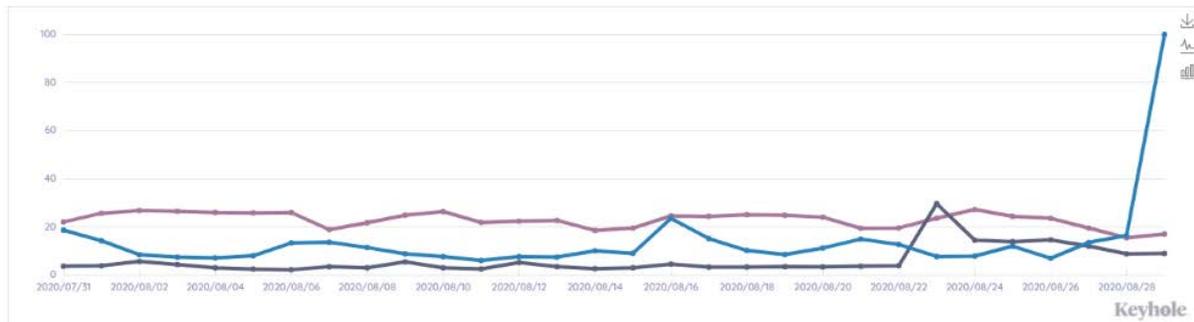


Social Sentiment + Hot Topics

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.

While COVID-19 is still real, with more than 6 million Americans having tested positive and nearly 183,000 that have died, coverage and attention has once again shifted to social justice after the shooting of Jacob Blake in Kenosha, Wisconsin and ongoing protests in Portland.

Interest Over Time
Indexed to 100 at Peak



Analytics

Topic	Posts	Users	Potential Impressions
#covid-19	19.0M	16.0M	267.9B
portland	11.6M	9.0M	53.1B
#blacklivesmatter	5.1M	4.8M	16.9B

As the Oregon summer slowly gives way to fall, Portland finds itself in the unenviable position of being inexorably drawn into a highly polarized, highly visible, national fall election narrative. The [shooting death of Patriot Prayer](#) member during a pro-Trump car caravan through downtown Portland has amplified the tension and social conversations both here and nationally; this comes on the heels of 90+ days of social justice protests, late night violence and three straight weekends of clashes between progressive and conservative groups in downtown Portland.

The conversations were [escalated further](#) after Mayor Wheeler's press conference asking President Trump to "stay the hell away" and the president's swift rebuttal (in real time) via Twitter. This exchange led to Ted Wheeler being a trending topic on Twitter on Sunday, August 30.

Even in the lead up to this weekend, Portland's protests and violence have been trending up in the last two weeks. Consider:

- On Sunday, Aug. 23, Acting DHS Secretary Chad Wolf [criticized Portland's response to protests](#) on CNN, saying that unlike cities such as Atlanta and Chicago, "Portland has fostered an environment that allows violent individuals across the spectrum to come into

downtown Portland, assault law enforcement, assault federal facilities... and they do little to nothing about it.”

- Portland held up several times as a “poster child” by [speakers](#) (and the [President](#)) during last week’s Republican National Convention as an example of the chaos cities controlled by Democrats.

While the violence is not reflective of the entire city and the [Governor](#) and [Mayor](#) both have plans to address the violence, it is clear that Portland (and Oregon) will continue to be in the spotlight unless there is major de-escalation in the violence and confrontation between groups, happening downtown. Downtown business groups and neighborhood activists are also [calling on an urgent fix](#).

Note – While chatter about these issues is minimal on the Travel Oregon channels, the social team is recommending that we stay dark Monday and Tuesday (Aug. 31 and Sept. 1) and maintain a minimal posting cadence for the rest of the week (unless the violence escalates). Travel Portland is also staying quiet and reassessing the situation daily.

A breakdown of conversations is shown below.



Noteworthy trending topics for Portland and social justice issues include:

- The *New York Times* featured a [story on Black Portlanders’ Intisar Abioto and artist Sharita Towne](#) about how Black creators have been able to use the momentum of the protests to make their voices (and art) heard and writes that “the burst of creativity that has swept through town in recent



weeks could provide a road map for other cities confronting racist histories.”

- Social justice protests are also happening in across Oregon.
 - There was a [peaceful march](#) in support of Black Lives Matter in Pendleton over the weekend (Aug. 29-30).
 - In the small town of [Rogue River](#), tensions flared when more than 200 anti-Black Lives Matter protesters faced off against a cookout and family-friendly gathering of the Southern Oregon Coalition for Racial Equity.
 - *Seaside Signal* also [featured a quote](#) from the owner of Seaside Brewing who mentioned that a protest and standoff between gun rights and pro-Trump protesters and counter protesters along Broadway and the Prom led to the immediate loss of “thousands and thousands of dollars” in revenue from families who departed the outdoor seating area intimidated by armed protesters.
- The narrative of Lake Oswego being a place that is not welcoming for people of color was again highlighted in this Yahoo post about [Sundown Towns](#). This follows a viral incident against a family of Indian descent as described in the Aug. 17 report.

COVID-19 Topics:

The combination of social justice protests and wildfires have resulted in COVID-19 taking somewhat of a backseat in the headlines and conversations, both in Oregon and nationally. Nationally, the spread appears to be stabilizing, with approximately 42,000 daily cases verses the summer high of 60,000+ cases daily. In Oregon, OHA reports that more than 26,000 people have been diagnosed with COVID-19 and 400 have died from it.

The trends in Oregon are also looking good.

- According to OHA, the [rate of transmission is slowing](#) and there has been a steady decline since July 4th holiday. In addition, coronavirus diagnoses, hospitalizations and deaths have gradually declined over the past three weeks (albeit not enough to reopen schools).
- Why has Oregon fared relatively well compared to California and Washington? An [Oregonlive analysis](#) says it’s a combination of “geography, demographics, public health orders, the willingness of a substantial number of Oregonians to abide by them and even a bit of luck.”
- The WHO is warning that “[young people are emerging as main spreaders of the coronavirus](#),” a trend that is already creating fears and warnings as [some schools and colleges](#) open across the country. In addition, in Asian nations that are currently experiencing recent surges, the age of those infected skewed younger.

Other Hot Topics (This is based on what influencers and media are sharing):

- Wildfires also continue to be a major conversation point with fires cropping up over the weekend near [Green Peter Lake and Mapleton](#) along with the continuing Opal Creek and White River fires.

Interestingly, COVID-19 maybe a contributing factor here as the Oregon Department of Forestry says that increasing crowds in the forests has resulted in humans causing 90% of fires this year in Oregon. That is a jump from the typical year when 70% of fires are human caused.

Zach Urness @ZachsORoutdoors · 12h

Hard to pick one, but this might be the biggest story of the evening (outdoors wise). A pretty big wildfire is growing near Mapleton in the Oregon Coast Range. Evacuations. It's right next to popular Sweet Creek Falls area.



Multiple Oregon wildfires near Mapleton bring evacuations to Sweet Cr...
Multiple wildfires are burning in the forest outside Mapleton, bringing mandatory evacuation orders.
[statesmanjournal.com](#)

1 4 3

Zach Urness @ZachsORoutdoors · 12h

Here's second story of the night. There's an active wildfire at Green Peter Lake and fire crews have been using boats to attack it. The lake and Quartzville area remains open, but a popular park and boat ramp is closed.



Firefighters use boats to attack wildfire on roadless peninsula at Green ...
Firefighters had to use boats to reach a wildfire that sparked Saturday on a roadless peninsula in Green Peter Lake northeast of Sweet Home.
[statesmanjournal.com](#)

- To keep tourism afloat during the pandemic, some countries such as New Zealand and Australia and Baltic countries [formed travel alliances \(bubbles\)](#) with their neighbors to create safe travel zones. However, these travel bubbles have had mixed results as flare ups and resurgence in COVID-19 led to closures and quarantines.
- CNN and Moody's Economics have teamed together to create a [Recovery Index](#) that tracks the recovery of each state based on a matrix of [37 indicators](#), including traditional government statistics such as unemployment and consumer confidence along with other indicators such as Google workplace mobility and OpenTable data. According to the Index, economic activity nationwide is down by almost one-fourth from its pre-pandemic level and is currently at 77%. Oregon's economic recovery is slightly ahead of the the national average at 79%.
- According to [Politico](#), the recession is now "not just a low-wage recession" and what began as a shutdown that initially impacted the hospitality industry is now "bearing down on white-collar" professions such as real estate, information and professional and technology services. The impact to these industries is already "worse than the hits they took during the Great Recession."
- Instagram's TikTok rival Reels has been in the wild for about a month now. Based on early reviews, it may not be as great as the original with critics saying that TikTok is better for [content consumption](#) and for [creators](#).
- In an article titled "[But I saw it on Facebook](#)", Doctors Seema Yasmin and Craig Spencer detail how social media is making it tough for doctors to do their jobs.

This "infodemic" is also [detailed in a new report](#), *Facebook's Algorithm: A Major Threat to Public Health*, which finds that Facebook pages that push misinformation garner much higher pageviews and "only 16 percent of the content it identified as misinformation was labeled as such by Facebook," showing how difficult it is to root out misinformation about the pandemic.

The primary reason for this is that the FB algorithm is naturally designed to exploit emotive and divisive content. According to Facebook itself, unless this algorithm stops rewarding such content, Facebook would feed users "more and more divisive content in an effort to gain user attention and increase time on the platform."

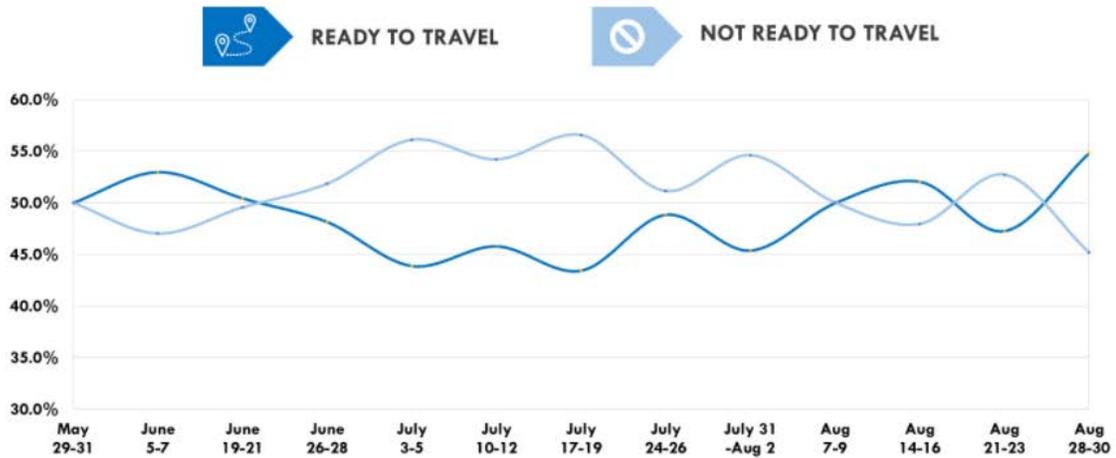
National Trends

Destination Analysts (Week of August 30th)

- American travelers recorded another measured gain in optimism about the pandemic's course in the next month.
- The perception of travel activities as unsafe is the lowest it has been since June 15th.

Americans have also demonstrated improvement in their state of mind around travel readiness and Fall travel expectations improved to 35.9% from a low of 29.8% last week.

HISTORICAL DATA



QUESTION: WHEN IT COMES TO GETTING BACK OUT AND TRAVELING AGAIN, WHICH BEST DESCRIBES YOUR CURRENT STATE OF MIND? (SELECT ONE)

(Base: Waves 12-13 and 15-25. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207 and 1,250 completed surveys. Data collected May 29-31, June 5-7, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9, 14-16, 21-23 and 28-30, 2020)



AMERICANS' TRAVEL STATE-OF-MIND AS OF AUGUST 30TH



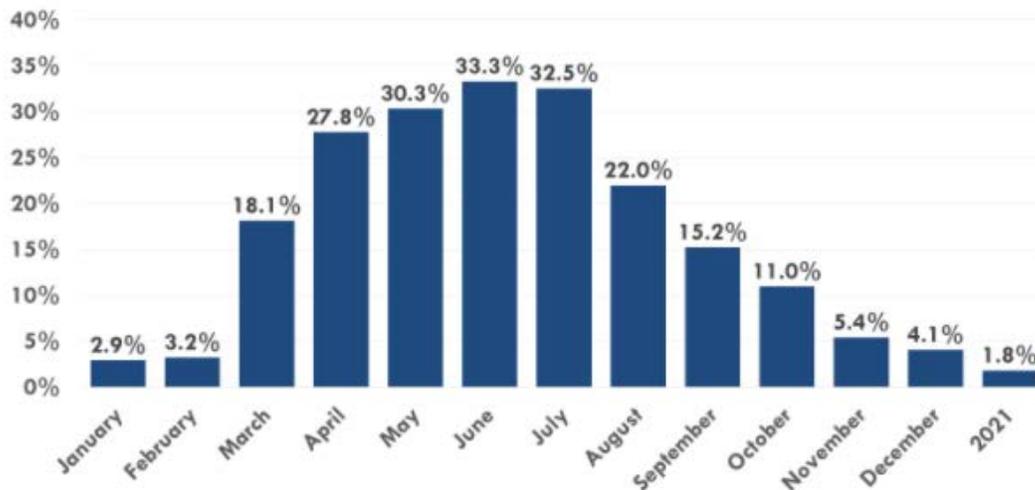
- Americans prioritization of travel in their personal budgets is growing. Now, 43.0% of American travelers say that leisure travel will be at least a somewhat high priority in their personal budget in the next year and a majority of American travelers say the pandemic has not negatively impacted the disposable income they have available for travel. However, they indeed plan on being more budget conscious on their trips than they were prior to the pandemic.

- Although sentiment is turning more positive, the pandemic is nevertheless still impacting travel at a high rate. 49% of American travelers have cancelled a trip due to COVID-19 and trips for the upcoming national Labor Day and Thanksgiving holidays currently look to be off by half relative to 2019.

CORONAVIRUS-CAUSED TRIP CANCELLATIONS AS OF AUGUST 30TH



of American travelers have cancelled a trip due to the COVID-19 Pandemic. These travelers have cancelled **2.1 trips on average.**



**QUESTION: THE TRIP(S) YOU CANCELED WOULD HAVE TAKEN PLACE IN WHICH MONTHS?
(SELECT ALL THAT APPLY)**

(Base: Wave 25 data. Respondents cancelling a trip, 636 completed surveys. Data collected Aug 28-30, 2020)



Employment in Leisure & Hospitality Through July 2020

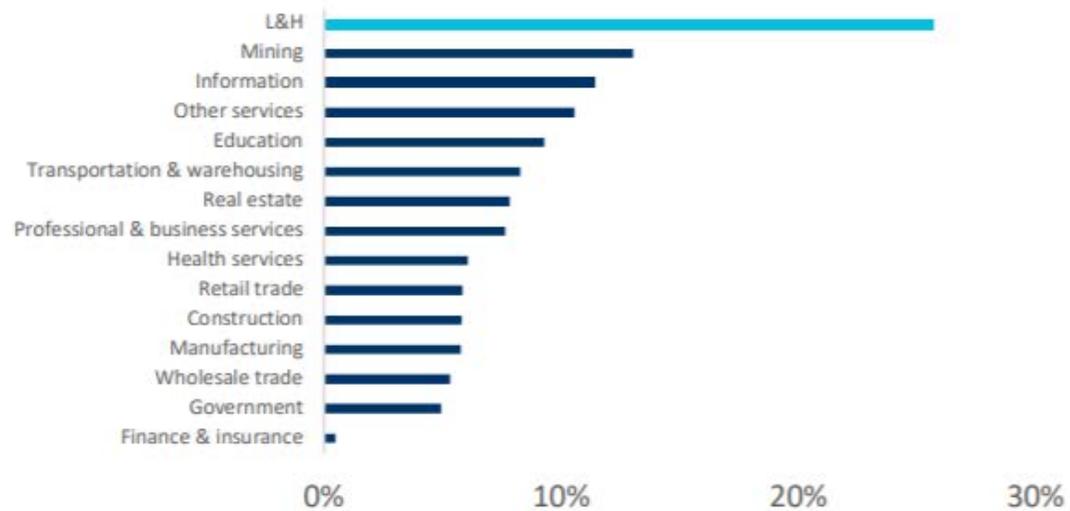
New [report](#) prepared for U.S. Travel Association by Tourism Economics analyzes job loss in the leisure and hospitality industry due to the coronavirus pandemic.

- The Leisure & Hospitality industry, as prescribed by the North American Industry Classification System (NAICS), accounted for 11% of pre-pandemic employment in the United States, yet has suffered over one-third of all job losses.
- 34% of jobs (4.3 million) lost since February in the Leisure & Hospitality.
- Nearly half of the 16.9 million jobs in the Leisure & Hospitality industry were lost in March and April. Since then, almost four million jobs have been created or restored. However, this still results

in over one-quarter of Leisure & Hospitality workers being unemployed – double the next most hard-hit industry.

Employment Level

% of jobs lost, Feb-Jul



Source: BLS

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
