

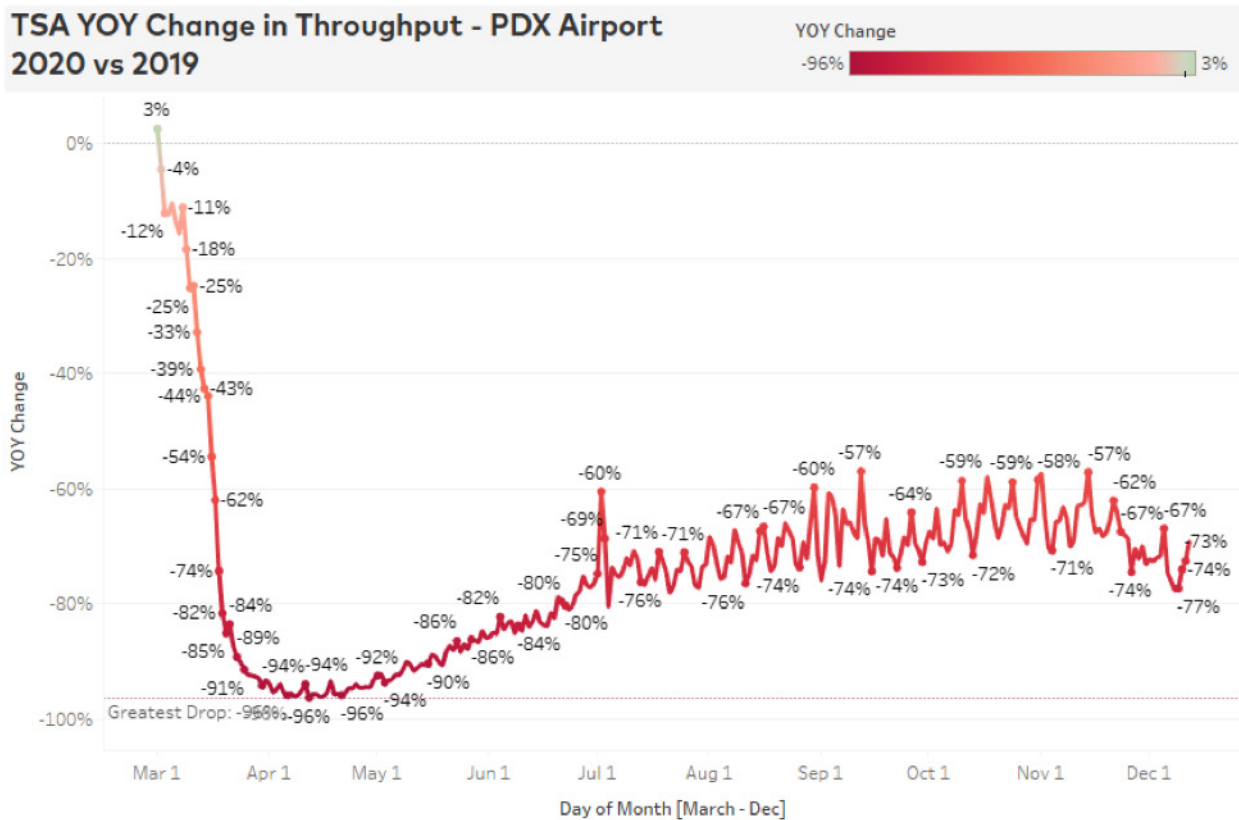
# Impact of COVID-19 on Travel Industry

December 21, 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 6,716 passengers utilized the checkpoints on Saturday, an increase of 401 over the previous Saturday. We've been anticipating a spike in traffic going into the holiday season, but due to the ever-increasing rate of CV19 cases and increased restrictions from the governor we've started to see similar YOY percentages that we were seeing back in June and July.



## STR Monthly Data (Month of November)

In comparison with the same month in 2019, the Oregon hotel performance recorded the following:

- Occupancy: -28.5% to 47.1%
- ADR (Room Rate): -16.7% to US\$102.93
- RevPAR: -40.5% to US\$48.44
- Oregon continues to outperform the US in all three metrics.

## STR Weekly Data (December 6 to December 12)

Oregon weekly occupancy remained relatively flat from the previous week, according to the latest data from STR through 12 December. In comparison with the same week in 2019, the industry recorded the following:

- Occupancy: 38.68% (-27.9%)
- Room Rate: US\$85.75 (-21.7%)
- Revenue Per Available Room (RevPAR): US\$33.20 (-43.8%)
- Southern Oregon's occupancy was 3% lower than the previous week, but Southern Oregon remains the region with highest occupancy (53.33%) through 12 December.
- Willamette Valley showed the second highest occupancy (44.28%).
- Portland is still showing the lowest occupancy (31.96%).



### Weekly STR Stats (% Chg YOY)

(December 6 to December 12)

	Occupancy (%)		Room Rate (\$)		RevPAR (\$)		Room Supply		Room Demand		Room Revenue (\$)	
Oregon	38.68%	-27.9%	\$85.75	-21.7%	\$33.20	-43.8%	467,446	-2.2%	180,823	-29.5%	\$15,519,172	-45.0%
Central	37.37%	-9.2%	\$85.21	-8.8%	\$31.93	-17.3%	40,460	1.9%	15,119	-7.4%	\$1,291,709	-15.7%
Coast	38.79%	-3.6%	\$91.32	-1.4%	\$35.59	-5.0%	77,000	0.5%	29,868	-3.2%	\$2,740,088	-4.6%
Eastern	36.60%	-2.5%	\$74.50	-2.0%	\$27.30	-4.6%	33,250	0.5%	12,169	-2.0%	\$907,860	-4.2%
Hood/Gorge	38.16%	-17.8%	\$84.23	-7.3%	\$32.23	-24.2%	16,135	4.2%	6,157	-14.3%	\$520,106	-21.0%
Portland	31.98%	-54.0%	\$86.44	-31.7%	\$27.66	-68.7%	165,522	-7.3%	52,941	-57.4%	\$4,577,663	-71.0%
Southern	53.33%	19.1%	\$82.99	-0.1%	\$44.29	18.5%	59,115	0.1%	31,527	19.2%	\$2,618,450	18.6%
Willamette Valley	44.28%	-14.4%	\$83.37	-12.2%	\$36.93	-25.1%	75,691	1.5%	33,517	-13.1%	\$2,795,042	-24.0%

## U.S. Travel Association and Tourism Economics COVID Impact Estimates (December 10)

Oregon

Weekly Travel Performance (dollar figures in millions)								
Week ending in...	10/17	10/24	10/31	11/7	11/14	11/21	11/28	12/5
Travel spending	\$ 179.3	\$ 170.3	\$ 182.6	\$ 151.3	\$ 156.5	\$ 158.2	\$ 158.1	\$ 146.9
Change from last year	\$ (79.3)	\$ (88.2)	\$ (75.9)	\$ (97.5)	\$ (92.3)	\$ (90.6)	\$ (90.8)	\$ (96.9)
Percent change (%)	-31%	-34%	-29%	-39%	-37%	-36%	-36%	-40%
Federal taxes lost	\$ (7.3)	\$ (8.1)	\$ (7.0)	\$ (9.0)	\$ (8.5)	\$ (8.4)	\$ (8.4)	\$ (8.9)
State taxes lost	\$ (1.2)	\$ (1.4)	\$ (1.2)	\$ (1.5)	\$ (1.4)	\$ (1.4)	\$ (1.4)	\$ (1.5)
Local taxes lost	\$ (0.9)	\$ (1.0)	\$ (0.9)	\$ (1.2)	\$ (1.1)	\$ (1.1)	\$ (1.1)	\$ (1.1)

## Social Sentiment (December 7 to December 20)

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.

2020 ends with hope as two vaccines have been approved and Oregon received its first doses of the Pfizer vaccine on December 15 and [vaccinations began on December 17](#).



This renewed sense of optimism was reflected across social feeds where conversation volume about the vaccine vastly outpaced conversations about COVID-19 itself. As frontline healthcare began receiving their vaccines this week, many documented and shared this historic event.

Despite this optimism, there was also grim acknowledgement from healthcare experts such as Dr. Choo of OHSU that virus is still with us, as Oregon experienced one of its most deadly weeks of the pandemic with [180 weeks in the past five days alone](#). Nationally, the death toll passed 300,000 with nearly 17 million cases.

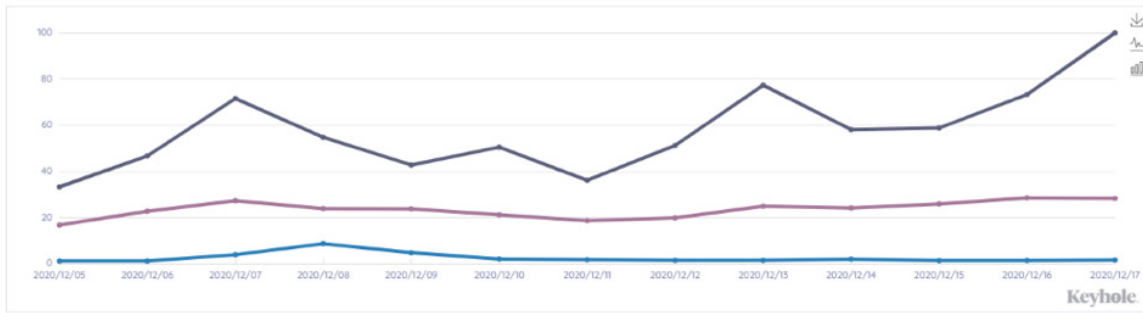
In addition, on social media, the [Washington Post reports](#) that "false theories about the vaccines' dangers and conspiracies about the government's plans for it are multiplying."

This is alarming considering that Oregon is home to ["a high volume of people with anti-vaccination sentiments, and has one of the lowest youth vaccination rates in the country."](#)



Interest Over Time

Indexed to 100 @ Number of Posts



Analytics

Topic	Posts	Users	Potential Impressions
vaccine	13.5M	12.0M	142.8B
#covid-19	5.4M	4.9M	85.1B
portland	545.4K	514.4K	1.9B

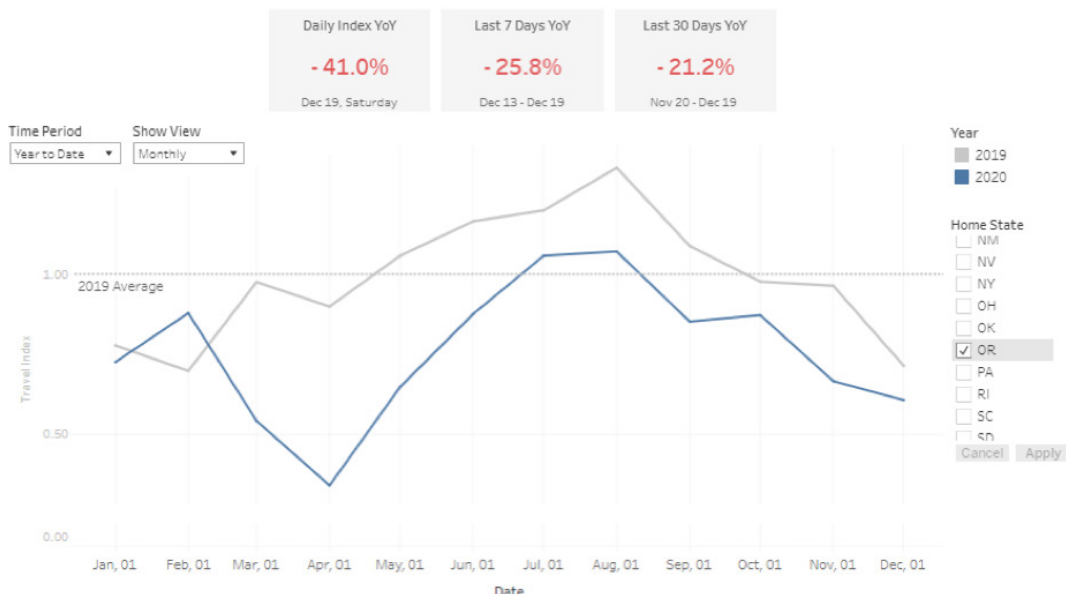
Most shared/talked about topics in or about Oregon include:

- The oncology nurse who boasted about flouting COVID-19 restrictions in a TikTok video ["is no longer employed with Salem Health."](#)
- The occupation of the Portland 'Red House' has captivated social justice activists the past two weeks. This story is complex and has many nuances that aren't easily digestible (which is partly why it hasn't taken off on social). Catch up [here](#) and [here](#).
- How [Umatilla tribe's health clinic is combating the pandemic](#).
- In positive news – the story about [chinook salmon returning to the upper Columbia River](#) was one of the most shared stories for multiple organizations including OregonLive, KGW and OPB.

Arrivalist Daily Travel Index

Over the past month, Arrivalist data indicates that Oregon has seen a 21.2% drop in travels at least 50 miles from home (within and to Oregon). See the following chart for the Oregon data.

Arrivalist US Daily Travel Index



Daily drive market index of US travelers who moved at least 50 miles from home and spent a minimum of 2 hours on their journey. The index is based on the average daily volume of 2019 travelers. Last Updated: Dec 19, 2020

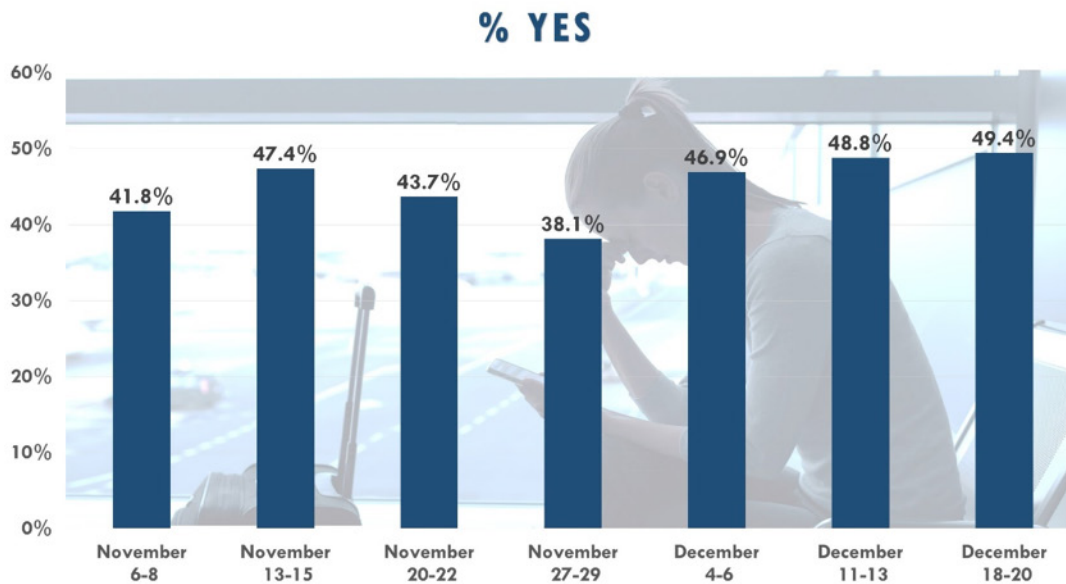
## National Trends

### Destination Analysts

#### Highlights from week of December 21:

- Half of American travelers feel their mindset around travel right now is one of hesitation and delay. Only 41.9% feel confident they can travel safely right now, down from a high of 49.7% just two weeks ago.

## TRIPS CANCELLED OR POSTPONED DUE TO RECENT CORONAVIRUS SURGE AS OF DECEMBER 20<sup>TH</sup>



**QUESTIONS: HAVE YOU CANCELLED OR POSTPONED ANY UPCOMING LEISURE TRIPS BECAUSE OF THE RECENT INCREASE IN COVID-19 CASES SEEN AROUND THE UNITED STATES?**

(Base: Wave 35-41 data. All respondents, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206 and 1,201 completed surveys.)



- As AAA and other sources are also predicting, Christmas travel will be down significantly from 2019, when nearly one-third of American travelers took a Christmas holiday trip. This week, just 17.4% of American travelers say they will take a trip for the holiday, with 6.9% still unsure. Cancellations of a Christmas trip due to the pandemic were reported by 28.5%.

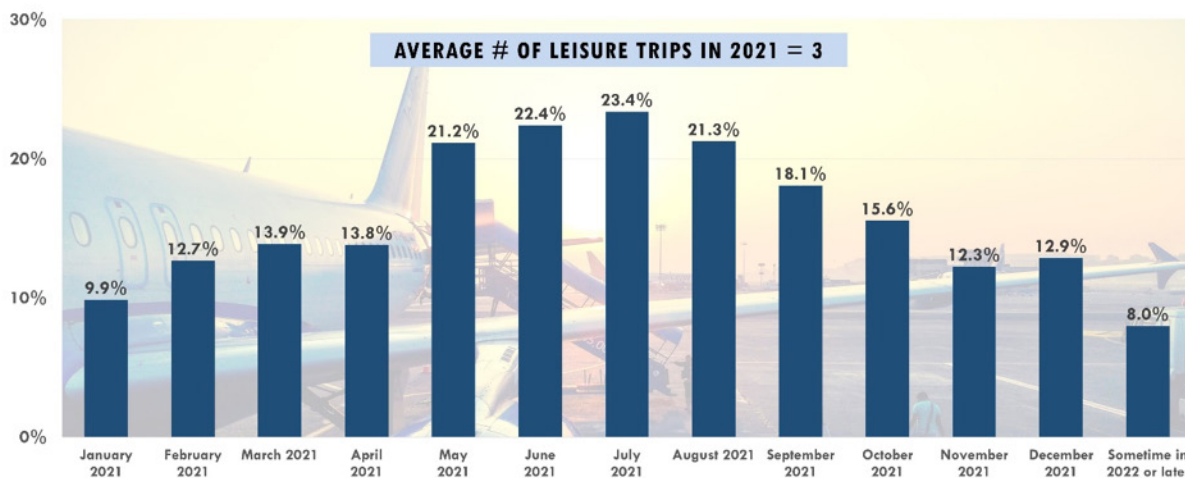


Destination  Analysts  
DO YOUR RESEARCH

- For those who are traveling for Christmas, the average Christmas trip will be 4.6 days to a destination 597 miles away—although 56.7% will be under 500 miles.
- Thankfully, there was further progress on the vaccine front. National anxiety levels about contraction of the coronavirus and its impact on personal finances and the economy all dropped. Most notably, there was a 10-point drop in the percent of Americans who feel the coronavirus situation will get worse in the next month. Instead, nearly a third feel the situation will stay the same.

- The vaccine news appears to continue to have a positive influence on Americans' travel sentiment for the future. The percent reporting an avoidance of international travel and conventions/conferences are both at 42-week lows, and openness to travel inspiration rebounded. American travelers are saying they will take an average of 3 leisure trips in 2021, with the May-August period the most common for travel.

## TIMING OF AMERICANS' UPCOMING TRAVEL PLANS AS OF DECEMBER 20<sup>TH</sup>



**QUESTION: EVEN IF ONLY TENTATIVELY SCHEDULED, IN WHICH MONTHS DO YOU CURRENTLY PLAN TO TAKE ANY LEISURE TRIPS? (SELECT ALL THAT APPLY)**

*(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)*

Destination  Analysts  
DO YOUR RESEARCH

- Americans are showing a growing agreement to take the vaccine.
- With the vaccine distribution timeline increasingly clear, 32.9% of Americans are now in the starting or actively planning a trip stage for 2021.
- However, the pandemic effects may linger for some time as Americans still express some travel hesitation, even with the vaccines. When asked to describe how they are going to approach getting back into travel in the period immediately after vaccines become widely available to the public, three quarters of American travelers say that they will get back carefully or test the waters first.
- There is the strongest support among American travelers for vaccine requirements for boarding flights and cruise ships.

### Tourism Economics Weekly Analysis

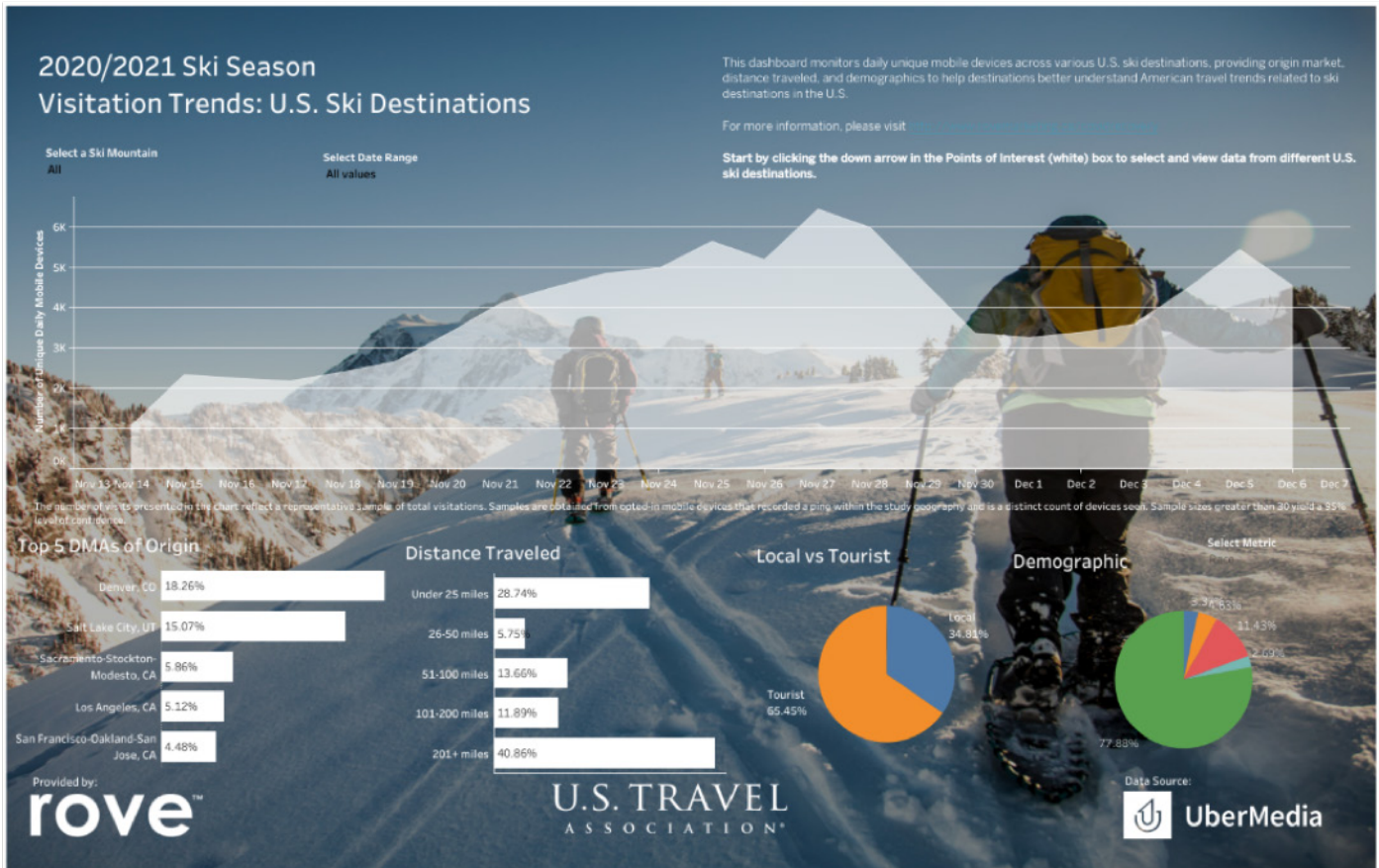
Analysis by Tourism Economics shows a week-by-week outlook on travel spending in the U.S. The analysis also looks at regional and state-by-state breakdowns. Findings from the December 12 report:

- Travel spending continued its slide last week, and shrank by an additional 1%. In the week ending December 12, travel spending tallied just \$10.8 billion—marking a new low since the week ending June 20—and reflected a 48% drop below last year's levels (a \$10.2 billion loss)
- The number of states and territories recording losses greater than 50% year-over-year (y/y) rose from 12 to 14, as travel spending contracted in both California and Connecticut
- California's travel economy deteriorated from -39% y/y at the end of November to -54% y/y last week due to rising COVID-19 cases and the re-implementation of lockdown measures

- Since the beginning of March, the COVID-19 pandemic has resulted in over \$500 billion in cumulative losses for the U.S. travel economy, equating to a daily loss of approximately \$1.75 billion for the past nine-and-a-half months
- The continual depressed level of travel spending has caused a loss of \$64.4 billion in federal, state, and local tax revenue since March 1

## Visitation Trends | U.S. Ski Destinations

In partnership with Rove Marketing and Uber Media, U.S. Travel's [exclusive dashboard](#) monitors daily unique mobile devices across various points of interest at sample ski destinations in the U.S.



The new dashboard covers the [2020/21 ski season](#) for over 20 ski destinations to analyze visitation trends based on the number of unique mobile devices at each ski resort. The dashboard also estimates distance traveled, origin markets, traveler vs local distinctions and includes a new demographic filter. The latest dashboard will help understand evolving winter travel trends and monitor recovery.

- While still early, the 2020 ski season is off to a very positive start
- Tourists made up of nearly two-thirds (65%) of visitation over the Thanksgiving holiday week, and more than two-thirds of visitors traveled more than 200 miles



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## **Research and Analytics Resources**

COVID-19 Impacts on the Outdoor Recreation Economy: <https://recreationroundtable.org/covid-19-impacts-survey/>

<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>

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