

# Impact of COVID-19 on Travel Industry

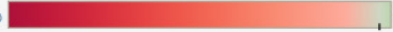
February 1, 2020

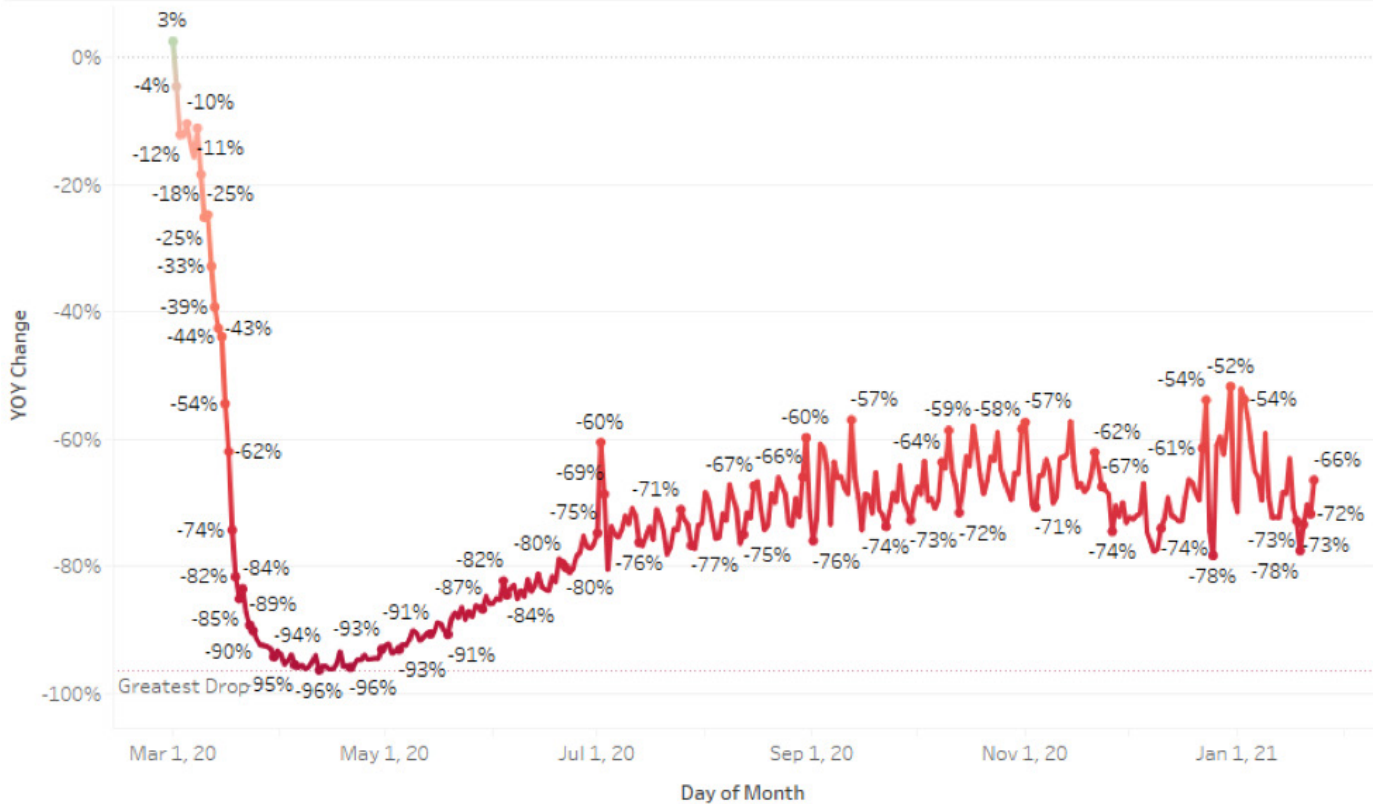
To help share information about COVID-19 impacts to the travel industry, Travel Oregon's research team is compiling state and national data on a bi-weekly basis to share with external partners. The data below is this week's summary and is for informational purposes only.

## PDX Airport Data

On Saturday the 23rd of January, TSA reported 5,509 passengers utilized the checkpoints, a decline of 1,065 over the previous Saturday. Throughput has declined steadily since the spike experienced during the holiday travel period. We saw a few days even hit lower throughput numbers that we hadn't seen since mid-summer. The CDC and state department have been issuing new rules related to mandatory mask requirements and proof of negative CV19 tests for international flights. Uncertainty around air travel will likely remain throughout the summer.

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

YOY Change  
-96%  3%



## STR Weekly Data (January 17 to January 23)

Oregon weekly hotel Occupancy, Room Rate, and RevPAR remained flat from the previous week, according to STR's latest data through 23 January.

In comparison with the same week in 2019, the Oregon lodging industry recorded the following:

- Occupancy: 42.49% (-18.0%)
- Room Rate: US\$87.78 (-17.8%)
- Revenue Per Available Room (RevPAR): US\$37.35 (-32.5%)



### Weekly STR Stats (% Chg YOY) (January 17 to January 23)

	Occupancy (%)		Room Rate (\$)		RevPAR (\$)		Room Supply		Room Demand		Room Revenue (\$)	
Oregon	42.49%	-18.0%	\$87.78	-17.8%	\$37.35	-32.5%	468,741	-2.2%	199,176	-19.8%	\$17,505,687	-34.0%
Central	40.41%	-9.0%	\$94.97	-2.7%	\$38.49	-11.4%	40,537	1.9%	16,380	-7.2%	\$1,560,445	-9.7%
Coast	49.58%	10.6%	\$95.01	-1.3%	\$47.70	9.5%	77,448	0.5%	38,401	11.2%	\$3,694,588	10.1%
Eastern	37.51%	-1.9%	\$74.35	-4.4%	\$27.91	-6.3%	33,250	0.4%	12,472	-1.5%	\$928,021	-5.9%
Hood/Gorge	40.23%	-17.6%	\$92.20	0.3%	\$37.48	-17.0%	16,135	4.2%	6,491	-14.2%	\$604,742	-13.5%
Portland	34.59%	-42.2%	\$86.86	-26.4%	\$30.05	-57.9%	165,697	-7.3%	57,316	-46.5%	\$4,978,980	-61.0%
Southern	54.39%	27.0%	\$82.86	1.4%	\$45.07	28.7%	59,542	0.1%	32,383	27.1%	\$2,683,654	28.7%
Willamette Valley	47.45%	-16.4%	\$82.21	-18.4%	\$39.02	-32.0%	75,817	1.5%	35,973	-15.2%	\$2,958,250	-31.0%

- Coast and Southern Oregon saw YOY growth in Occupancy and RevPAR.
- Portland had the lowest occupancy (34.59%) and Eastern Oregon had the lowest RevPAR (\$27.91).

## Economic Impact Quarterly Forecast (Q4 2020 updates)

We received the Q4 Economic Impacts Forecast from Dean Runyan Associates. Highlights are detailed here,

- For calendar year 2020 the preliminary annual estimate of direct travel spending declined to \$5.4 billion. This is a 58.0% reduction from the \$12.8 billion in 2019 with most of the loss occurring between April and June (75%).
- Direct travel industry employment job loss for October – December is 23% YOY in Q4 which is about 28,000 less jobs than Q4 2019. Local tax revenues are estimated to decline 52% due to the continued weakness in lodging and air travel.

Direct Travel Spending losses in Oregon for CY '20

Q1 down **31%** YOY

Q2 down **75%** YOY

Q3 down **58%** YOY

Q4 down **59%** YOY

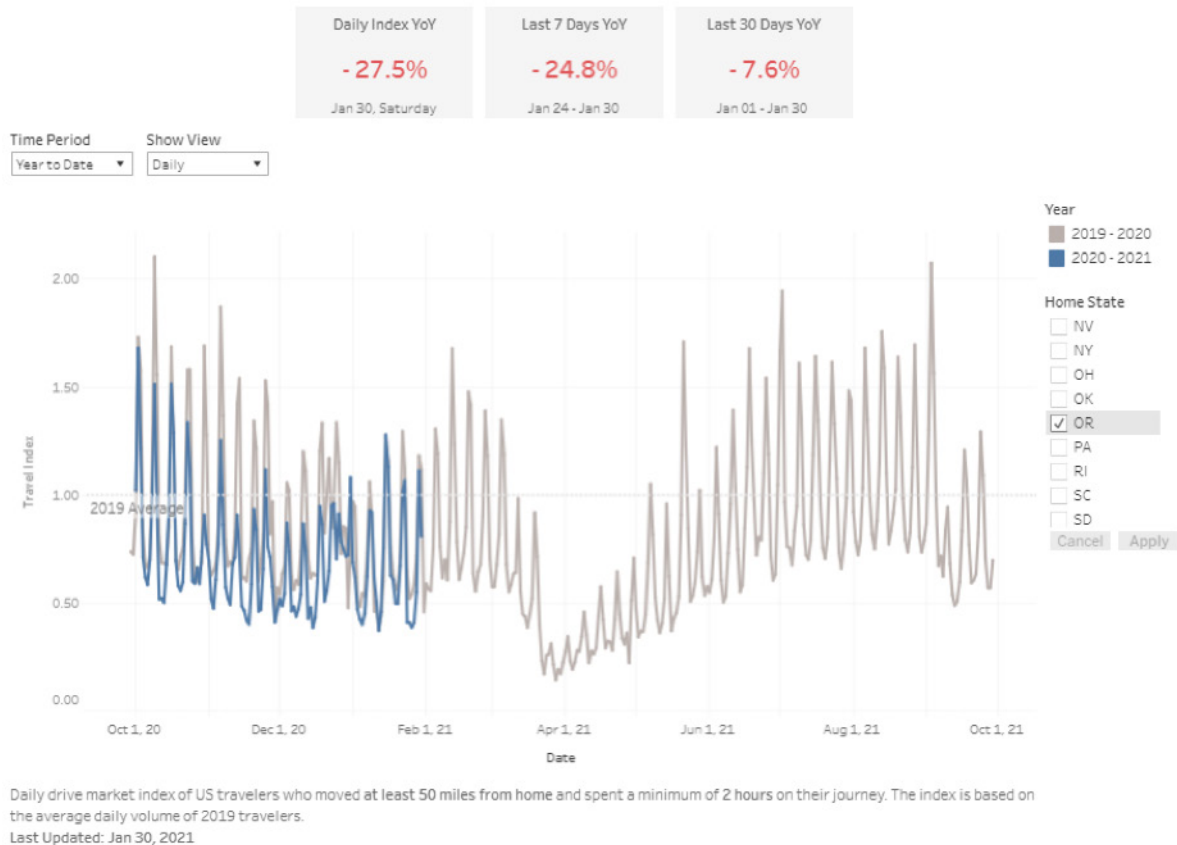
**Total YOY down 58% to \$5.4 billion**

Source: Dean Runyan Associates, January 2021

## Arrivalist Daily Travel Index

Arrivalist data indicates that in January 2021, Oregon saw a 7.6% drop in YOY travels (at least 50 miles from home within and to Oregon where travelers spent a minimum of 2 hours). See the following chart for the Oregon data.

Arrivalist US Daily Travel Index



## 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.*

In January, social media was dominated conversations about insurrection, impeachment, and inauguration (66+ million posts). While COVID-19 received far less attention (17 million posts), January was also unfortunately the [deadliest month in the pandemic](#) with more than 93,000 deaths nationwide (that's more deaths than U.S. casualties in the Vietnam and Korean wars combined). There's light at the end of the tunnel: Oregon's infection rate remains one of the [lowest in the country](#) (14 per 100,000) and Oregon's vaccination rate (56.1%) is currently in the [middle of the pack](#) despite a slow start in December.

As visualized in the word and hashtag clouds below content about Oregon vaccinations topics including clinics, eligibility, [equity](#) and media programs that gave voice to these issues such as the The Story on KGW trended in the past 2 weeks.

#covid19 #covidvaccine #pdx  
#vaccination #smartnews #vaccines  
#breaking #covid #portland  
#wtpblue #orpol  
#koin6news #seniorsfirst #orleg #demvoice1  
#onev1 #heydan #vaccineswork  
#nprconsiderthis #coronavirus

people stranded shots  
stuck care giving  
vaccines hours  
expire doses health impromptu  
car drivers snow  
team workers  
covid snowstorm  
knocking

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

- Vaccine distribution plans, particularly who is eligible for the vaccine, continues to be a focus in Oregon. The Governor's plan to place [teachers ahead of seniors](#) is a significant topic for media coverage, especially because [Oregon's plan doesn't follow CDC guidelines](#).

However, with the Governor's own Commission for Senior Services [asking her to reconsider the decision](#) and teachers indicating a [reluctance to return](#) to school even after receiving vaccinations, this topic is likely to remain a key focus of media attention in the coming weeks.

On Sunday, the *Oregonian* challenged the Governor to publicly call on ["teachers unions to commit to reopening schools this year."](#)

- OHA's decision to not disclose the details of coronavirus related deaths [was rescinded](#) by Governor Brown, 48-hours after the policy was enacted.
- The most viral Oregon COVID-19 story however belonged to [Josephine County health workers](#). The workers were stuck in a snowstorm on Highway 199 following a vaccine clinic in Southern Oregon. Instead of letting the 6 remaining doses of vaccine get wasted, they walked car-to-car to distribute the vaccine to stranded motorists.



The story was easily the most shared post across all local media channels and was picked up by the wire, garnering nearly 50 million potential impressions with coverage on CNN, NBC, ABC and People.



Beyond COVID-19, CrowdTangle Facebook data for the most popular shared content indicates that Oregon audiences were also highly interested in more positive content including the official rose of the Portland Rose Festival, Lillard twins, Nora's return to the Oregon Zoo and infamous fake-Oregonian, Australian pigeon!



The Oregonian

January 29 at 9:34 AM · 🌐

...

"The festival is introducing this colorful, single-stem rose with large pink and yellow striped blooms to add a 'Burst of Hope' to every garden."



OREGONLIVE.COM

**'Burst of Hope' is the official rose of the 2021 Portland Rose Festival**

The rose's optimistic name ties in to the Portland Rose Festival Foundation's 2021 theme of "H..."



KGW-TV

January 22 at 7:00 PM · 🌐

...

Congratulations! ❤️❤️



damianlillard Just call me Daddy Dame from now on... Kali Emma Lee Lillard (Callie...girl) and Kalii Laheem Lillard (kuh-lee .boy) ... Couldn't leave jr out... 1-21-21 🧡👶👶

24m



dwrightuno Congrats family

21m 33 likes Reply



wayno119 Congrats Dame

17m 19 likes Reply



Liked by

and 144,096 others

24 MINUTES AGO



KGW.COM

**'Just call me Daddy Dame': Blazers star Damian Lillard, fiancée welcome twins**

Lillard and his fiancée Kay'la Hanson now have three children. The couple's first child, Damian ...



The Oregonian

January 27 at 9:47 AM · 🌐

...

💙 Nora!! 💙

The young bear, who stole the hearts of visitors to the Oregon Zoo in 2017, will be returning to Portland in March.



OREGONLIVE.COM



OPB

January 14 at 12:04 PM · 🌐

...

A racing pigeon that survived an extraordinary 8,000-mile Pacific Ocean crossing from Oregon to Australia has been deemed a quarantine risk and must be killed.



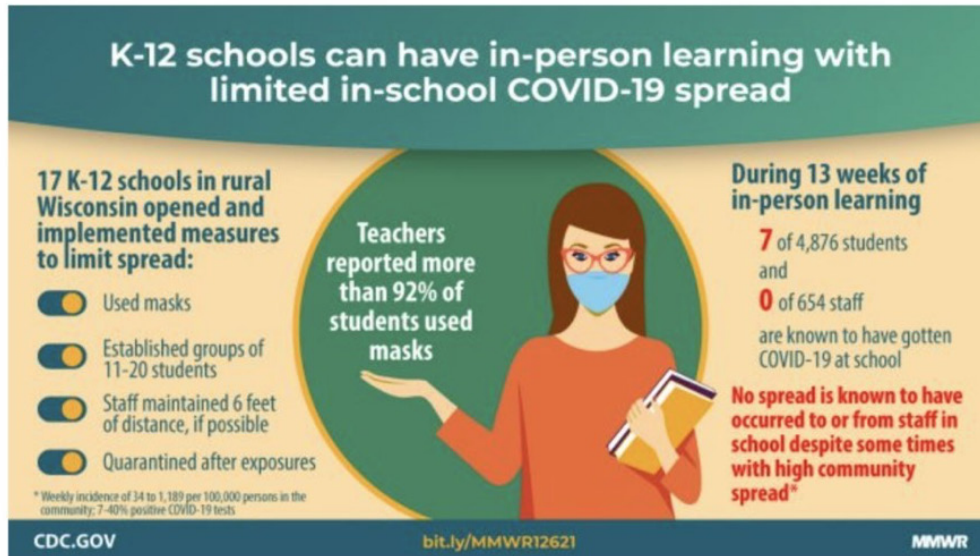
OPB.ORG

**Australia says pigeon that crossed the Pacific from Oregon must be destroyed**

A racing pigeon survived an extraordinary 8,000-mile ocean crossing from Oregon to Australia...

## Other interesting articles:

- A survey of more than 1,300 lenders, investors, developers and other national real estate experts found that Portland has dropped from [third-most desirable real estate market in the nation in 2017 to 66th](#) (out of 80 destinations) in 2021. This comes as Portland continues to be in the national spotlight following unrest and vandalism during inauguration week that was addressed by President Biden's team during a [White House briefing](#).
- In an essay in the [Journal of the American Medical Association](#), the CDC writes that the "preponderance of available evidence" from a fall semester had reassured the agency that with adequate masking, distancing, and ventilation, the benefits of opening schools outweigh the risks of keeping kids at home for months.



- As we eat more meals at home, [seafood sales are surging across the country](#). Consumer sales however are not making up for the loss in revenue for the industry that has been hit by restaurant closures, outbreaks and social distancing and other pandemic-induced precautions.
- Vox examines the [delicate relationship](#) between those who can afford to work in remote destinations (Zoom towns/countries) and the costs and benefits of this to the locals in these destinations.
- The pandemic and the Black Lives Matter movement [has changed how many travelers are thinking and planning travel post-pandemic](#). Volunteer travel, personal growth, Civil Rights trails and other values-driven trips are predicted to be important as travelers hit the road in 2021.

## National Trends

### Destination Analysts' Travel Sentiment Survey

#### Highlights from week of January 25th

The latest research confirms it: Americans need a vacation. More than six in 10 Americans (63%) report that they "desperately" need a vacation.

- Close to 6-in-10 American travelers (59%) miss traveling "very much" and 55% are excited about leisure travel in the next six months.
- Americans' perceptions of the safety of travel and leisure activities continue to be the among the best they have been during the pandemic.

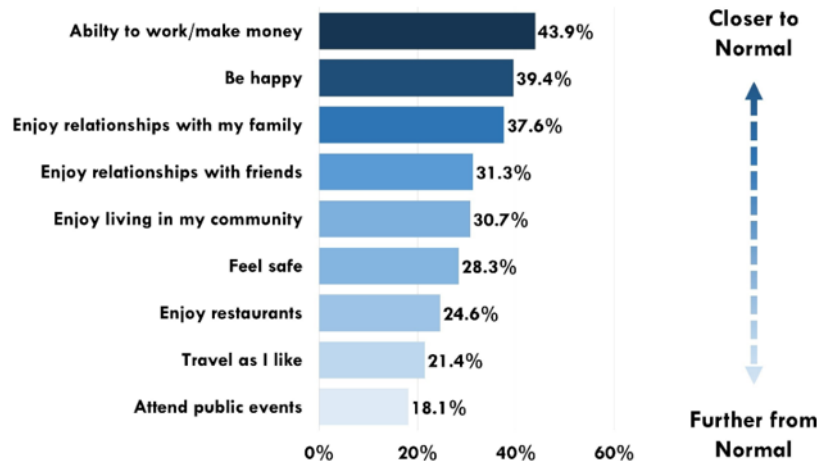


- Less anxious and pessimistic about the pandemic, Americans still feel quite some distance from "normal" —particularly when it comes to travel.

## HOW FAR ARE WE FROM NORMAL?

AS OF JANUARY 31, 2021

% of Americans Rating Normalcy 8-10 on a 10-point scale



QUESTION: NOW LET'S TALK ABOUT HOW CLOSE TO (OR FAR FROM) YOUR LIFE IS TO NORMAL (I.E., BEING TOTALLY UNAFFECTED BY THE COVID-19 SITUATION.) FOR EACH, TELL US ABOUT YOUR LIFE USING THE SCALE WHERE 1 EQUALS "STILL VERY FAR FROM NORMAL" AND 10 EQUALS "ALREADY COMPLETELY NORMAL."

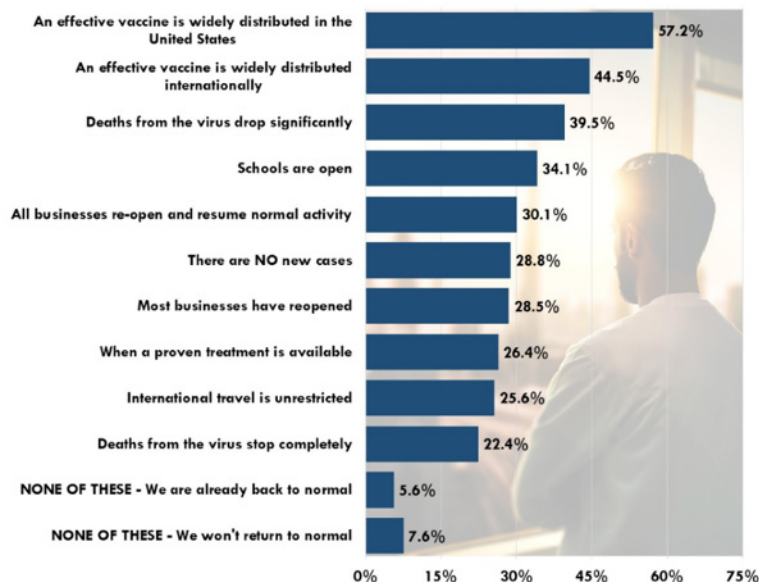
(Base: Wave 47 data. All respondents, 1,209 completed surveys.  
Data collected January 29-31, 2021)

Destination Analysts  
DO YOUR RESEARCH

- Vaccines play a large role in a return to normal. When asked what needed to happen before they feel things have returned to a normalcy, they are comfortable with, there was the most agreement with having an effective vaccine widely distributed in the United States (57.2%), followed by an effective vaccine widely distributed across the globe (44.5%). About two-thirds of American travelers feel the available vaccines are safe and most American travelers who have not yet received the vaccine expect to be vaccinated by June (57.9%).

## REQUIREMENTS FOR A RETURN TO NORMALCY

AS OF JANUARY 31, 2021



QUESTION: PLEASE THINK ABOUT THE END OF THE CORONAVIRUS SITUATION. IN YOUR MIND, WHICH OF THE FOLLOWING WILL NEED TO HAPPEN BEFORE YOU FEEL THINGS HAVE RETURNED BACK TO A NORMALCY YOU ARE COMFORTABLE WITH? (SELECT ALL THAT APPLY)

(Base: Waves 47 data. All respondents, 1,209 completed surveys.  
Data collected January 29-31, 2021)

Destination Analysts  
DO YOUR RESEARCH



- The proportion of Americans planning to travel within the next three months has grown.

## AMERICAN TRAVEL IN THE NEXT 3 MONTHS (FEBRUARY—APRIL 2021) AS OF JANUARY 31, 2021



### OF THOSE TRAVELING IN NEXT 3 MONTHS



- Although 56.1% still don't want travelers in their own community right now, 40.5% said they would be happy to see an ad promoting their community as a place for tourism when it's safe.
- Cities as a trip destination have grown in popularity (40.9%), surpassing small towns and rural destinations (31.6%).

### Trip Accommodations:

**Hotels: 61.4%**

**Home of Friend/Family: 28.6%**

**Vacation Rentals/  
Airbnbs: 14.6%**

### Destinations:

**Cities: 40.9%**

**Small towns/  
rural: 31.6%**

**Beach: 31.4%**

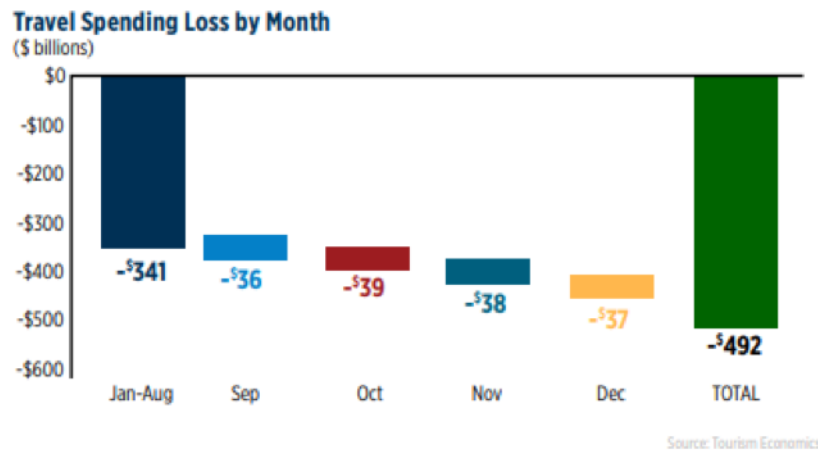
Destination  **Analysts**  
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- Nearly three quarters (72%) of employed Americans indicated they set aside time to plan out vacation days for the coming year.
- More than 9-in-10 (93%) American workers say it is important to use their paid time off to travel.
- Once a vaccine is more widely available, 53% of American workers prefer to use their paid time off to take a vacation away from home.

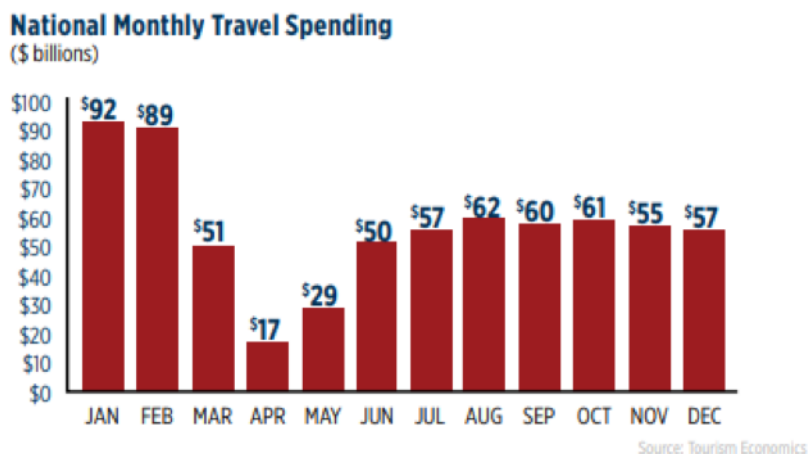
## U.S. TRAVEL'S OUTLOOK ON TRAVEL SPENDING IN THE U.S.

Highlights from January 22nd report

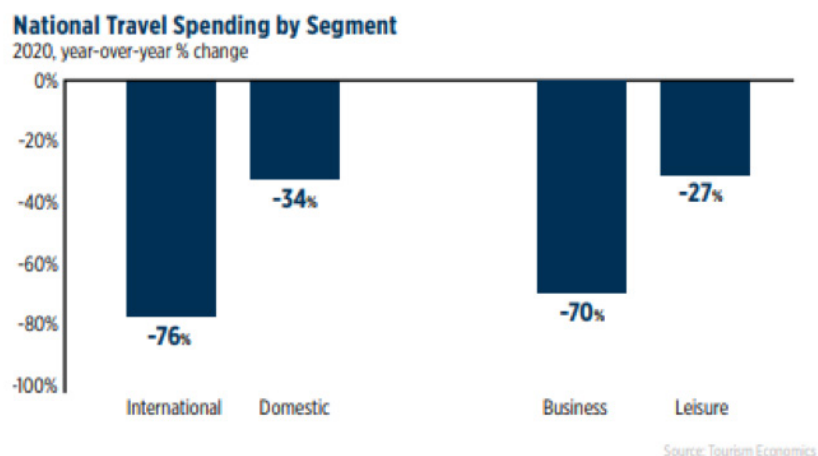
- In 2020, the travel sector lost \$492 billion compared to the prior year – an unprecedented 42% annual decline.



- Travel spending improved modestly during the last three weeks of the year. The week leading into the new year registered \$14.6 billion in travel spending – the second-best week since March 14th, behind only the week of Labor Day Weekend.



- International travel and business travel suffered the sharpest declines. International travel spending fell 76% (compared to 34% for domestic travel) while business travel spending fell 70% (compared to 27% for leisure travel)



- The pandemic heavily impacted the travel economies of every state and territory
    - Hawaii suffered the most of any state (-60% y/y) and Mississippi suffered the least (-26%)
    - In total, 18 states and territories experienced a greater than 40% downturn in travel spending
  - The continual depressed level of travel spending has caused a loss of \$64 billion in federal, state and local tax revenue since March 1
- 

## **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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If you have any questions, please direct them to: [ladan@traveloregon.com](mailto:ladan@traveloregon.com)