

Impact of COVID-19 on Travel Industry

March 8, 2021

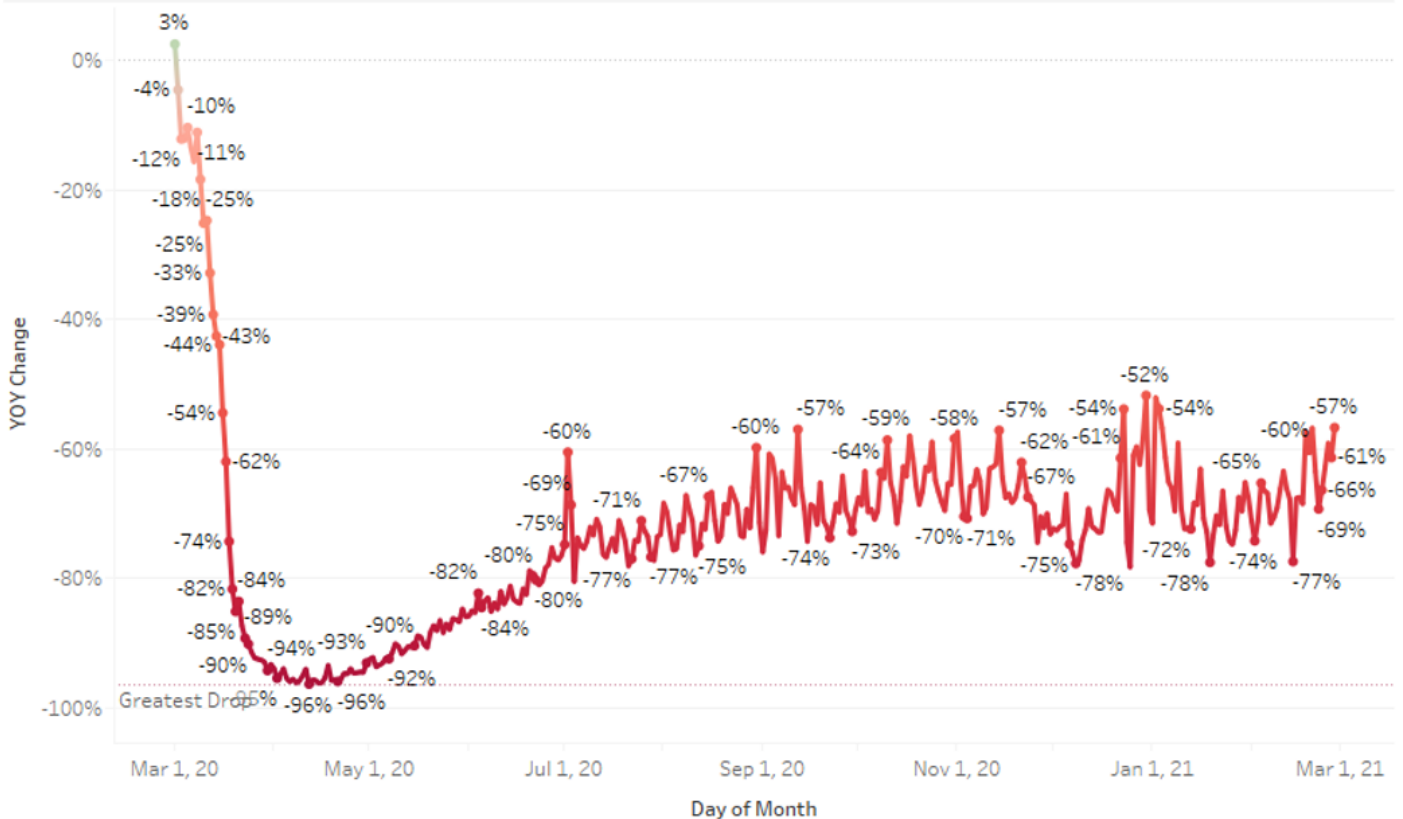
To help share information about COVID-19 impacts to the travel industry, Travel Oregon's research team is compiling state and national data on a bi-weekly basis to share with external partners. The data below is this week's summary and is for informational purposes only.

PDX Airport Data

On Saturday the 27th of February, TSA reported 7,643 passengers utilized the checkpoints, a decline of 293 over the previous Saturday. YOY throughput has declined steadily over the last week despite throughput counts climbing for the last week. Since the peak in air travel over the holiday weekend, throughput took a short dip before bouncing back in late February.

TSA YOY Change in Throughput - PDX Airport
2020 vs 2019

YOY Change
-96%  3%



2020-21 Thru Put - PDX



STR Weekly Data (February 21, 2021 to February 27, 2021)

- The Coast and Southern Oregon saw YOY increases across the board (from Occupancy through Rev Par)
- We did see improvements in YOY Revenue loss (from the January 17 to January 23 time period) in Oregon, Central Oregon, Portland, and the Willamette Valley
 - Eastern Oregon fell vs. that time period



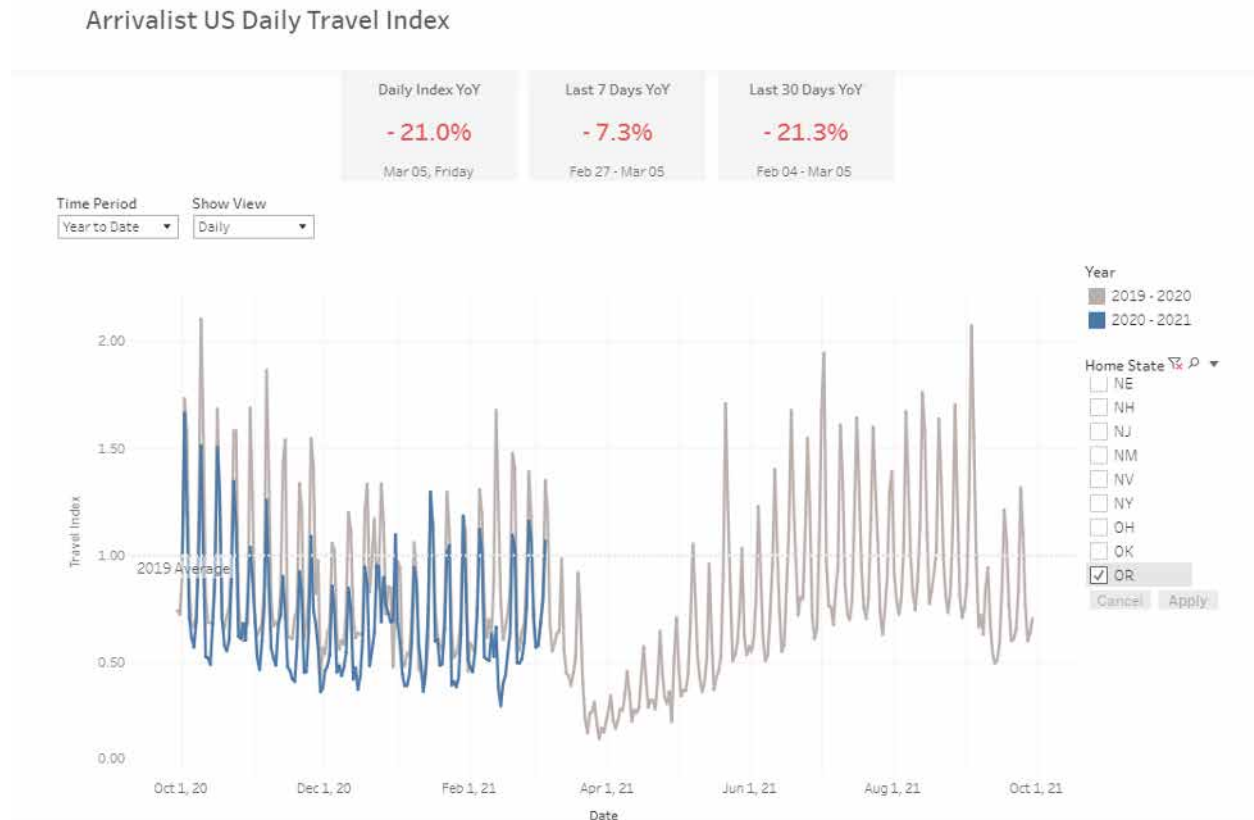
Weekly STR Stats (% Chg YOY)

(February 21, 2021 to February 27, 2021)

	Occupancy (%)		Room Rate (\$)		RevPAR (\$)		Room Supply		Room Demand		Room Revenue (\$)	
Oregon	50.06%	-13.1%	\$91.64	-14.3%	\$46.05	-25.5%	476,819	-2.3%	238,684	-15.1%	\$21,955,540	-27.2%
Central	45.12%	-6.9%	\$92.30	-6.2%	\$42.00	-12.1%	41,566	3.9%	18,756	-3.3%	\$1,745,708	-8.7%
Coast	56.31%	8.6%	\$100.94	0.7%	\$57.93	9.0%	79,646	0.8%	44,847	9.5%	\$4,614,169	9.9%
Eastern	41.17%	-15.5%	\$75.02	-2.0%	\$30.94	-17.1%	34,657	0.4%	14,267	-15.1%	\$1,072,171	-16.7%
Hood/Gorge	47.00%	-12.4%	\$89.78	-2.9%	\$42.66	-15.0%	16,135	4.2%	7,584	-8.7%	\$688,366	-11.4%
Portland	42.51%	-36.0%	\$89.62	-25.2%	\$38.10	-52.3%	165,816	-8.3%	70,494	-41.3%	\$6,318,283	-56.2%
Southern	64.55%	29.1%	\$86.57	5.7%	\$56.12	36.7%	60,025	0.1%	38,749	29.2%	\$3,368,666	36.7%
Willamette Valley	57.42%	-1.8%	\$89.69	-8.0%	\$51.52	-10.2%	77,210	2.2%	44,334	0.3%	\$3,977,789	-8.2%

ARRIVALIST DATA (February 4, 2021 – March 5, 2021)

- Oregon saw a significant YOY US Daily Travel Index drop for February (-21.3%)
 - For comparison, the month of January was only down YOY by -7.6%
 - Part of the drop was due to Valentine's Day, which took a huge dive in 2021 vs. 2020
- The last week of the time period (February 27, 2021 – March 5, 2021) looks much better
 - Only off by -7.3%
- Note: US Daily Travel Index measures travel 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.



Social Sentiment + Trends

With declining cases and a rapid increase in vaccinations and the approval of the new Johnson & Johnson, single-dose vaccine, the prevailing theme of the past five weeks has been one of optimism, both nationally and in Oregon.

Nationally, the 7-day average of cases for March 1-6 is at its lowest level since October, and hospitalizations are down to just over 40,000 (from a high of 130,00 in mid-January according to the [COVID Tracking Project](#)).

In Oregon, more counties improved in risk level, [high school sports started](#), and the Governor ordered school reopened by April. OHA Director Pat Allen also [recently reported](#) that Oregon has the "fourth lowest coronavirus case rate in the nation, the fourth lowest death rate and the fourth lowest COVID-19 death rate among seniors."



On the vaccination front, Oregon recently announced more than [1 million doses administered](#), and ranks [14th of all states](#) in percentage of vaccines administered.

Despite the optimism, there are caution signs ahead:

1. Expect scheduling snafus and [long wait times](#) to increasingly become an issue as more Oregonians become eligible for the vaccine;
2. In addition, the emergence of a [homegrown coronavirus variant](#), first identified by OHSU that is more deadly and more resistant to the vaccine; in fact searches of the terms "Oregon variant," "Oregon COVID variant" or "Oregon virus variant" is up appx. 1600-2500% in the past 7 days.
3. [Anti-mask mandate](#) efforts and [anti-vaccination sentiment](#) on social media.

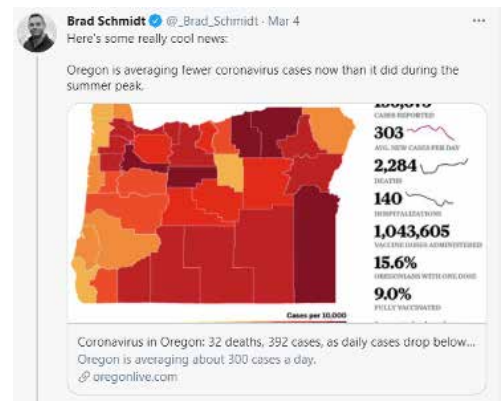
The word cloud below visualizes the trending COVID-19 topics in Oregon, with mostly pertaining to vaccine scheduling struggles and vaccine eligibility.



Additionally, it's noteworthy that overall, COVID-19 conversations were relatively low this month due to the ice storms and related power outages that led to several days of outages across the state. In fact, the top three search terms for the month according to Google Trends were: "pge salem Oregon," "Oregon power outage map" and "PGE outage map Oregon."

Most shared/talked about topics in or about Oregon based on CrowdTangle & Cision data include:

- The optimism we're feeling with rapidly declining hospitalization rate was clearly visible in the sentiment and more than 1,500 shares of KGW's Facebook post of the story about Providence Portland's critical COVID care unit [recently having zero patients](#).
- A federal judge ordered Oregon to ensure that all prison inmates were vaccinated due to its [high infection rates](#). Stories about this issue garnered nearly 50 million potential impressions.
- Finally, the [AP story](#) about four Oregonians contracted COVID-19 after being vaccinated also was widely shared on social media garnering more than 10.1 million potential impressions on Twitter.



Other interesting articles:

- To get a clearer sense of the disproportionate impact of COVID-19 on minorities and seniors over 60, [Vox analyzed mortality rates](#) by age, region, and race from 2020.
- Nearly 80% of the [346,000 workers who vanished](#) from the U.S. labor force in January are women.
- Audio messaging is becoming a bigger part of social media and work amid the pandemic. The growth in [Clubhouse](#), launch of Mark Cuban's new podcast app "[where hosts can talk to fans live and monetize their conversations](#)," and [Twitter's experiments with Spaces](#) has all been supported by the widespread use of AirPods and other hands-free devices.
- A tribute to York, an enslaved Black man who helped Lewis & Clark on their journey to the Pacific [cropped up on Mt. Tabor](#) in late February.



National Trends

Destination Analysts' Travel Sentiment Survey

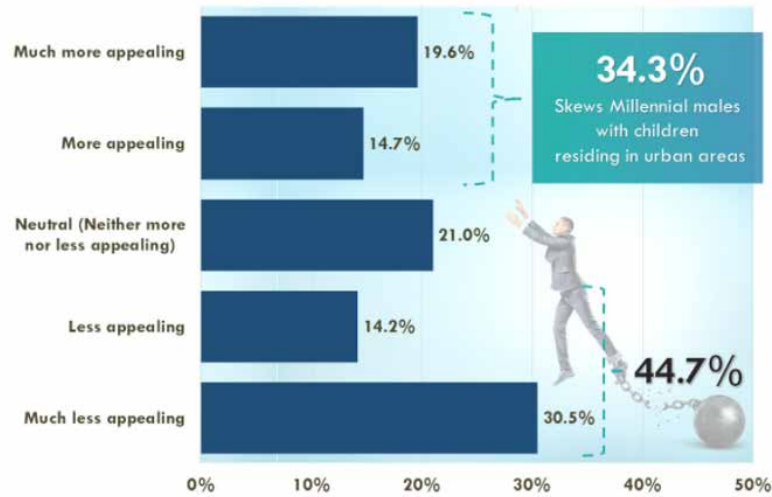
Highlights from week of March 8th

Half of Americans remain optimistic about the coming month. They also continue to feel safer—the average rating of the more than two dozen travel and leisure activities we track as “unsafe” has fallen another 3% this week to 40.0%. This a remarkable decline from a record-high 69.4% recorded the week of April 13th, 2020 and 57.8% at the start of 2021. Firm travel confidence is at a pandemic record 37.0%.

Thinking about Texas and Mississippi announcing the lifting of COVID restrictions in their states this past week: We see the Americans' competing and complicated emotions around safety and travel in their response to the question “All else equal, if a state fully lifted its coronavirus restrictions now, would this make that state a more or less appealing destination to visit?”

- About 45% of Americans say this would makes the state a LESS appealing destination.
- Yet over one-third say this would make the state MORE appealing; these travelers skewing Millennial males with children who reside in urban areas. For those responsible for tourism in their destinations, it's important to note that those who find lifted COVID restrictions unappealing from a tourism standpoint skew towards tourism naysayers right now—largely agreeing they currently don't want visitors in their own communities.

IMPACT OF STATE'S LIFTING OF COVID RESTRICTIONS ON ITS TOURISM APPEAL AS OF MARCH 7, 2021



QUESTION: ALL ELSE EQUAL, IF A STATE FULLY LIFTED ITS CORONAVIRUS RESTRICTIONS NOW, WOULD THIS MAKE THAT STATE A MORE OR LESS APPEALING DESTINATION TO VISIT? (SELECT ONE TO COMPLETE THE SENTENCE)

LIFTING CORONAVIRUS RESTRICTIONS NOW WOULD MAKE A STATE A _____ PLACE TO VISIT

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)

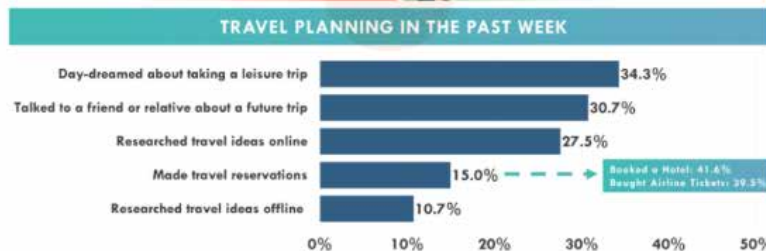
Destination Analysts
DO YOUR RESEARCH

American travelers are aligned on increased travel interest and activity:

- Openness to travel inspiration grew another 5% and reached another pandemic record high — now at 60.6%.
- In the past week, a pandemic-record 71.1% travel dreamt and/or planned.
- 15.0% said they actually made a booking, largely hotels and airline tickets.
- About 84% of American travelers have trips at least tentatively planned, and there is a growing percentage reporting planned trips for May (20.3%).

TRAVEL DREAMING & PLANNING

BETWEEN MARCH 1–7, 2021



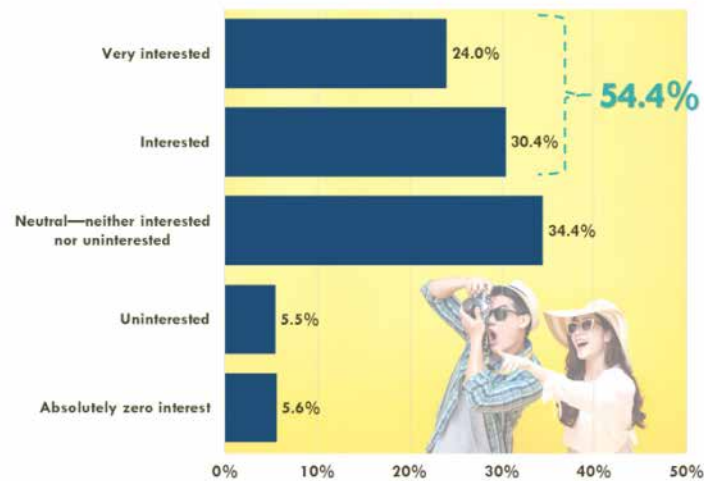
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Destination Analysts
DO YOUR RESEARCH

As more Americans travel through and post this pandemic, will they be open to visiting physical Visitor Information Centers?

- In total, 45.3% of American travelers say they have used a Visitor Information Center on a trip in the last 5 years.
- Well over half—54.4%—say they would be interested in using a Visitor Information Center on their domestic trips this year. In fact, relatively few express being uninterested (11.1%).
- In terms of their expectations for these centers, they largely want the traditional — recommendations from staff and physical brochures—with the pandemic principles of masking and distancing.

INTEREST IN USING VISITOR INFORMATION CENTERS THIS YEAR AS OF MARCH 7, 2021



QUESTION: HOW INTERESTED WOULD YOU BE IN USING A VISITOR INFORMATION CENTER ON ANY OF YOUR DOMESTIC TRIPS IN THIS YEAR?

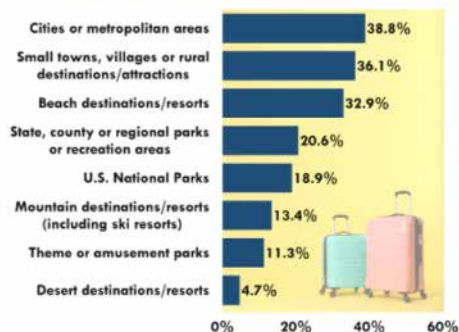
(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)



After suffering from the cancellation of convention and business travel in combination with travelers' pandemic-induced leaning towards outdoor, rural environments, urban destinations continue on their paths of tourism recovery. This week, 38.8% of travelers taking leisure trips in the next 3 months report they will visit an urban destination, outpacing rural and beach. In addition, several iconic U.S. cities are back on the Hot List of the domestic destinations Americans name as one of the destinations they most want to visit in 2021.

TRACKING URBAN TOURISM RECOVERY AS OF MARCH 7, 2021

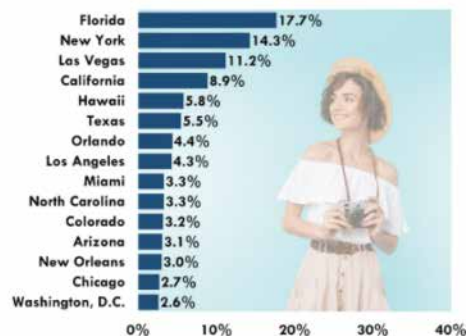
DESTINATION TYPES AMERICANS WILL VISIT IN NEXT THREE MONTHS



QUESTION: ON THESE LEISURE TRIPS, WHICH OF THE FOLLOWING ARE YOU EXPECTING TO VISIT?

(Base: Wave 52 data. Respondents who expect to take a leisure trip during the next three months, 712 completed surveys. Data collected March 5-7, 2021)

MOST DESIRED DOMESTIC DESTINATIONS THIS YEAR



QUESTION: WHICH DOMESTIC DESTINATIONS DO YOU MOST WANT TO VISIT THIS UPCOMING YEAR? (WRITE IN UP TO THREE)

(Base: Wave 52 data. All respondents, 1,206 completed surveys. Data collected March 5-7, 2021)



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>

If you have any questions, please direct them to: ladan@traveloregon.com