

Impact of COVID-19 on Travel Industry

May 3, 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 monthly basis to share with external partners. The data below is this week's summary and is for informational purposes only.

STR Weekly Data (April 18)

Note: Year over year (YOY) percentage changes are more favorable as comparisons have shifted to pandemic-affected weeks from 2020.

- Oregon recorded 58.2% occupancy, \$101.83 room rate, \$59.25 revenue per available room (RevPAR), and about 480,000 room supply.
- Oregon weekly occupancy, room rate, and RevPAR dropped from the previous week.
- While the lodging supply in Oregon increased by 1.4%, Portland and Southern Oregon region supply slightly fell from the 2019 levels.
- Central, Hood/Gorge, Willamette Valley, and Portland region occupancy, room rate, and RevPAR fell vs. the same week in 2019. Occupancy, room rate, and RevPAR were up in other regions (Coast, Eastern, and Southern).
- Southern Oregon saw the highest growth in all metrics except the room supply.



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| OREGON LODGING STATISTICS Current Week: April 18, 2021 | | | | | | | | | |
|---|---------------|---------------|---------------|----------------|---------------|---------------|---------------|---------------|--------|
| Region | Occupancy (%) | | | Room Rate (\$) | | | RevPAR (\$) | | |
| | | % Chg vs 2020 | % Chg vs 2019 | | % Chg vs 2020 | % Chg vs 2019 | % Chg vs 2020 | % Chg vs 2019 | |
| Oregon | 58.2% | 126.9% | -12.4% | \$101.83 | 31.7% | -13.3% | \$59.25 | 198.8% | -24.1% |
| Central | 59.7% | 177.7% | -14.1% | \$107.37 | 27.6% | -3.6% | \$64.14 | 254.3% | -17.2% |
| Coast | 60.5% | 172.4% | 3.8% | \$118.14 | 56.0% | 5.9% | \$71.50 | 324.9% | 9.9% |
| Eastern | 60.7% | 72.5% | 4.3% | \$84.07 | 17.0% | 5.1% | \$51.01 | 101.8% | 9.7% |
| Hood/Gorge | 59.9% | 91.7% | -13.6% | \$98.79 | 27.6% | -2.0% | \$59.14 | 144.5% | -15.4% |
| Portland | 49.0% | 130.7% | -33.3% | \$96.10 | 14.9% | -28.3% | \$47.12 | 165.2% | -52.1% |
| Southern | 75.2% | 135.4% | 25.5% | \$94.81 | 38.5% | 5.3% | \$71.28 | 226.0% | 32.1% |
| Willamette Valley | 62.7% | 103.7% | -3.4% | \$99.47 | 34.4% | -9.5% | \$62.37 | 173.9% | -12.6% |

| Room Supply | | | | Room Demand | | | Room Revenue (\$) | | |
|-------------------|---------|---------------|---------------|-------------|---------------|---------------|-------------------|---------------|---------------|
| Region | | % Chg vs 2020 | % Chg vs 2019 | | % Chg vs 2020 | % Chg vs 2019 | | % Chg vs 2020 | % Chg vs 2019 |
| Oregon | 479,815 | 10.8% | 1.4% | 279,165 | 151.4% | -11.2% | \$28,427,423 | 231.0% | -23.0% |
| Central | 41,566 | 8.1% | 6.7% | 24,828 | 200.3% | -8.3% | \$2,665,868 | 283.1% | -11.6% |
| Coast | 79,513 | 16.4% | 3.7% | 48,121 | 217.1% | 7.6% | \$5,685,128 | 394.5% | 13.9% |
| Eastern | 34,657 | 3.7% | 5.1% | 21,029 | 78.8% | 9.6% | \$1,767,956 | 109.2% | 15.3% |
| Hood/Gorge | 16,135 | 16.4% | 4.3% | 9,659 | 123.2% | -9.9% | \$954,177 | 184.7% | -11.8% |
| Portland | 173,530 | 11.3% | -0.4% | 85,084 | 156.9% | -33.6% | \$8,176,291 | 195.2% | -52.3% |
| Southern | 58,870 | 3.8% | -0.3% | 44,261 | 144.3% | 25.1% | \$4,196,194 | 238.3% | 31.7% |
| Willamette Valley | 77,098 | 15.3% | 2.7% | 48,346 | 134.9% | -0.8% | \$4,808,774 | 215.9% | -10.2% |

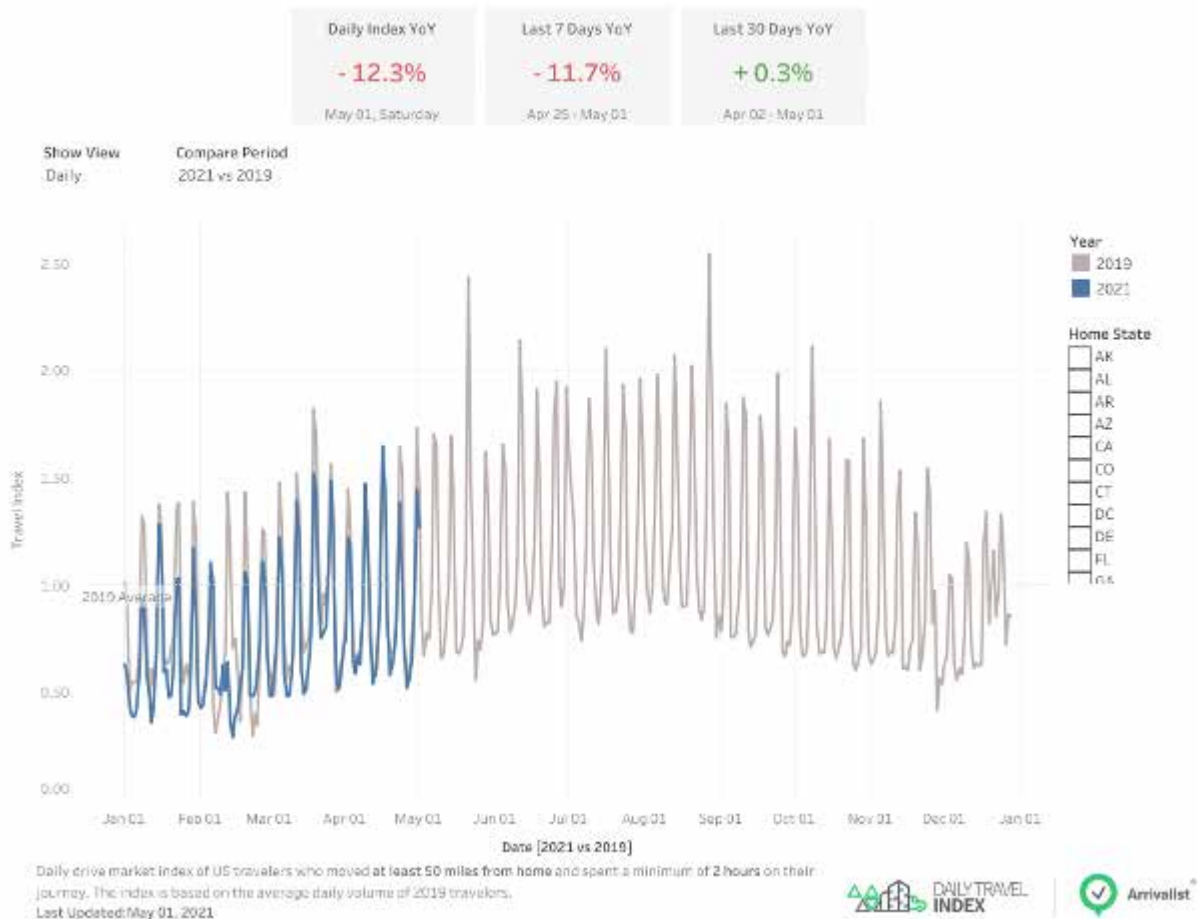
Source: STR

ARRIVALIST Daily Travel Index (May 1st , 2021)

- Road trips in Oregon increased by 0.3% in April compared to the average daily volume in 2019. Travel volume slowed down in last 7 days (-11.7%).

Note: Daily Travel Index measures travel at least 50 miles from home where travelers spent a minimum of 2 hours. See the following chart for the Oregon data.

Arrivalist US Daily Travel Index



Social Sentiment and 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 there are signs of normalcy across much of the country — relaxed outdoor mask standards from CDC, crowded stands at the Kentucky Derby, and the reopening of Disneyland—Oregon has seen some serious backsliding. Despite [nearly 2 million Oregonians being vaccinated](#), the state has experienced five straight weeks of rising cases, crossing the grim milestone of 2,500 COVID deaths and now leading the country in infection rates, with [123 cases per 100,000 people](#).

Despite the increased warnings and counties moving to increase restrictions, it is clear that pandemic fatigue has set in across the state, as demonstrated by this [viral tweet](#) of an off-campus tailgate party involving a huge crowd of mask-less students Eugene this weekend.



Mojo Hill
@mojohill22

COVID-19 should have a fun time with this.

(This is at my next-door neighbors' place.)



Vaccine hesitancy is also a worry. With everyone now eligible open to receiving a vaccine and more than 246 million vaccinations administered, health officials are also worried that we're approaching an inflection point where "[vaccine supply may outstrip demand](#)." Based on [Kaiser Family Foundation research](#), this is anticipated to happen by May 10th.



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

- 15 counties—including the population hubs of Portland, Salem and Eugene—[moving to "extreme risk,"](#) severely impacting the number of people who can gather indoors.
- [OHA's announcement](#) of 2 million vaccines administered along with eligibility opening up for everyone over 16. These two milestones had a reach of more than 15 million impressions.
- Data showing a [discrepancy between income and vaccination](#). Across the state, people in wealthier neighborhoods were one-and-a-half times as likely to have received at least one dose of vaccine as people in the poorest areas.
- The investigation of [an Oregon woman's death](#) following the administration of the Johnson & Johnson virus; she is currently the only known Oregonian to potentially be linked to the blood clot danger in the J&J vaccine.

Other noteworthy articles:

- Both [OPB](#) and [KATU](#) provided an in-depth analysis of why cases in Oregon are rising sharply; the reasons cited include virus variants, spring travel and overall low volume of infections over the past 12-months.
- Outside examines the rise of “Zoom” mountain towns with an [examination of Lake Tahoe](#) and the tensions that have come up—locals being priced out, housing shortage and COVID concerns—with the influx of wealth tech workers who have bought homes in the area.
- Protests and violence in Portland again took center stage these past few weeks after several nights of violence across the city that included more damage to the [Oregon Historical Society](#), protest at ICE headquarters and destruction at [Trailblazers Boys & Girls club](#). This included a [homepage story in New York Times](#).

National Trends

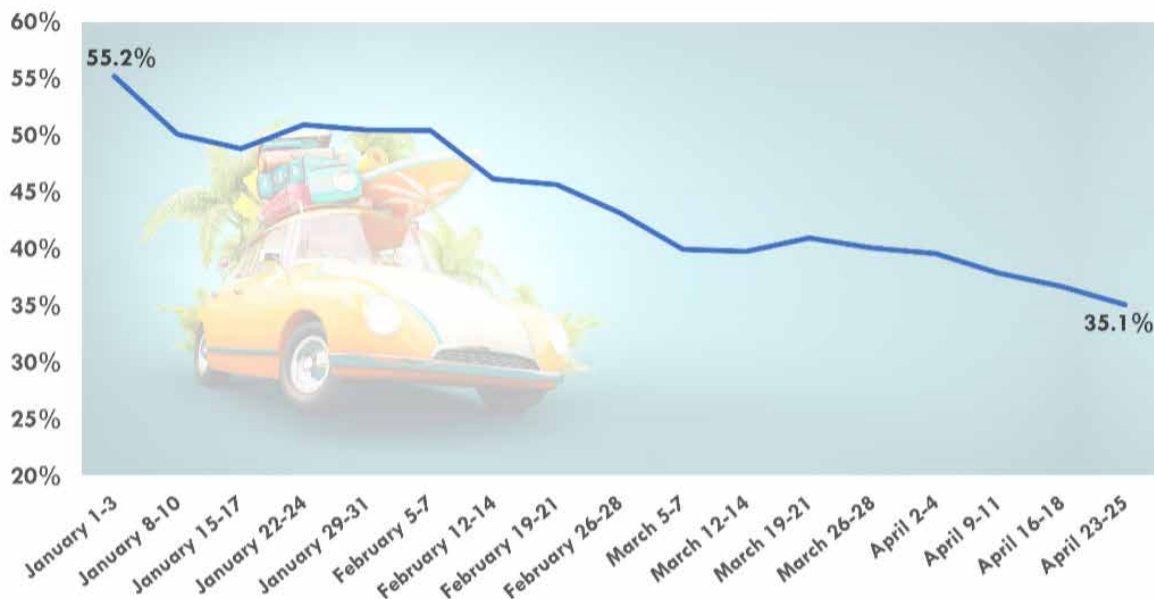
Destination Analysts' Travel Sentiment Survey

Highlights from week of April 26th

- Americans' anxiety about contracting the virus and the pandemic's financial impact are the lowest they have been.
- Americans' perceptions of travel activities as unsafe dropped again this week to another coronavirus-era low—now at just 35.1%, down from 57.8% in January and 69.4% one year ago. Over 43% say they would not feel guilty traveling right now—another pandemic record.

PERCEPTIONS OF TRAVEL ACTIVITIES AS UNSAFE REACHES ANOTHER PANDEMIC RECORD LOW JANUARY 1 – APRIL 25, 2021

% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITIES TESTED)



QUESTION: AT THIS MOMENT, HOW SAFE WOULD YOU FEEL DOING EACH TYPE OF TRAVEL ACTIVITY?

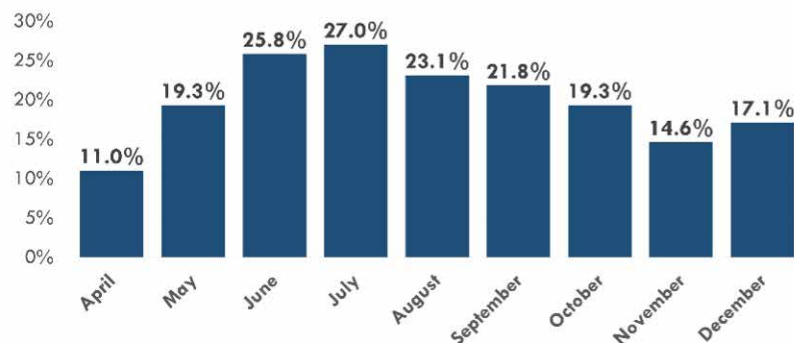
(Base: Waves 43-59. All respondents, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210 and 1,215 completed surveys.)

- Seven-in-ten Americans are in a ready-to-travel state of mind and two-thirds say they are highly open to travel inspiration. In the last week, over 75% have actively dreamt and/or planned travel, including the nearly 18% who made a booking or reservation for an upcoming trip.
- American travel is indeed definitively on the rise. As of this week, nearly 88% have at least tentative leisure trip plans right now and over 71% will be taking at least one trip within the next 3 months.

AMERICAN TRAVEL ON THE RISE AS OF APRIL 25, 2021



MONTHS AMERICANS HAVE TRIP PLANS IN 2021 (% OF AMERICAN TRAVELERS WITH PLANS IN EACH MONTH)



(Base: Wave 59 data. All respondents, 1,215 completed surveys.
Data collected April 23-25, 2021)

Destination  Analysts
DO YOUR RESEARCH

- 71.6% of American travelers say they will take a Summer vacation or getaway, up nearly 10 percentage points from last month and up nearly 36 percentage points from 2020. Across all American travelers, the average number of leisure trips being taken this Summer is 1.7, with July the peak month.

- Over 70% of Summer travelers plan to head out of state (and one-in-ten will travel abroad) so, while car is still the predominant transportation method, 34.2% will be getting on an airplane. Beaches remain the top destination and planned activity, although 27.3% say they will be visiting cities. Restaurants and retail stores look to be attracting tourists this Summer, as well.

SUMMER 2021: THE TRAVEL OUTLOOK AS OF APRIL 25, 2021



Will Take a Vacation
or Getaway Between
Memorial Day and Labor Day

THE AVERAGE AMERICAN TRAVELER PLANS
TO TAKE 1.7 SUMMER LEISURE TRIPS
→ COMPARED TO NORMAL



22% Will Travel
for Business



19% Will Travel for
a Convention/
Group Meeting



34% Will Travel
by Airplane



Say this is
MORE

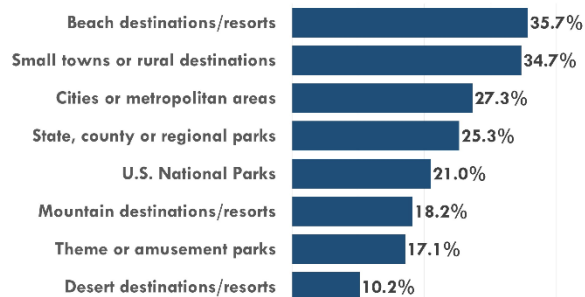
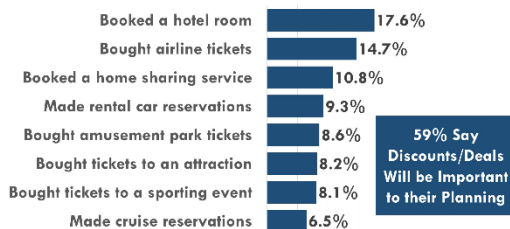


Say this is
the SAME

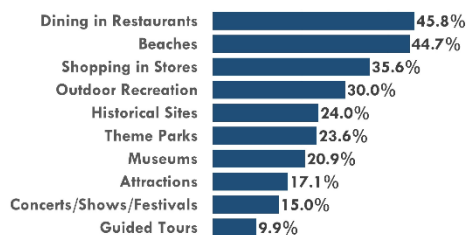


Say this is
LESS

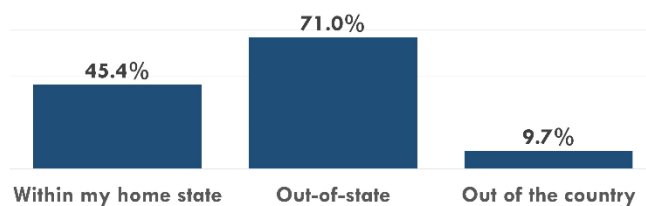
RESERVATIONS ALREADY MADE



ACTIVITIES PLANNED THIS SUMMER



SUMMER DESTINATIONS

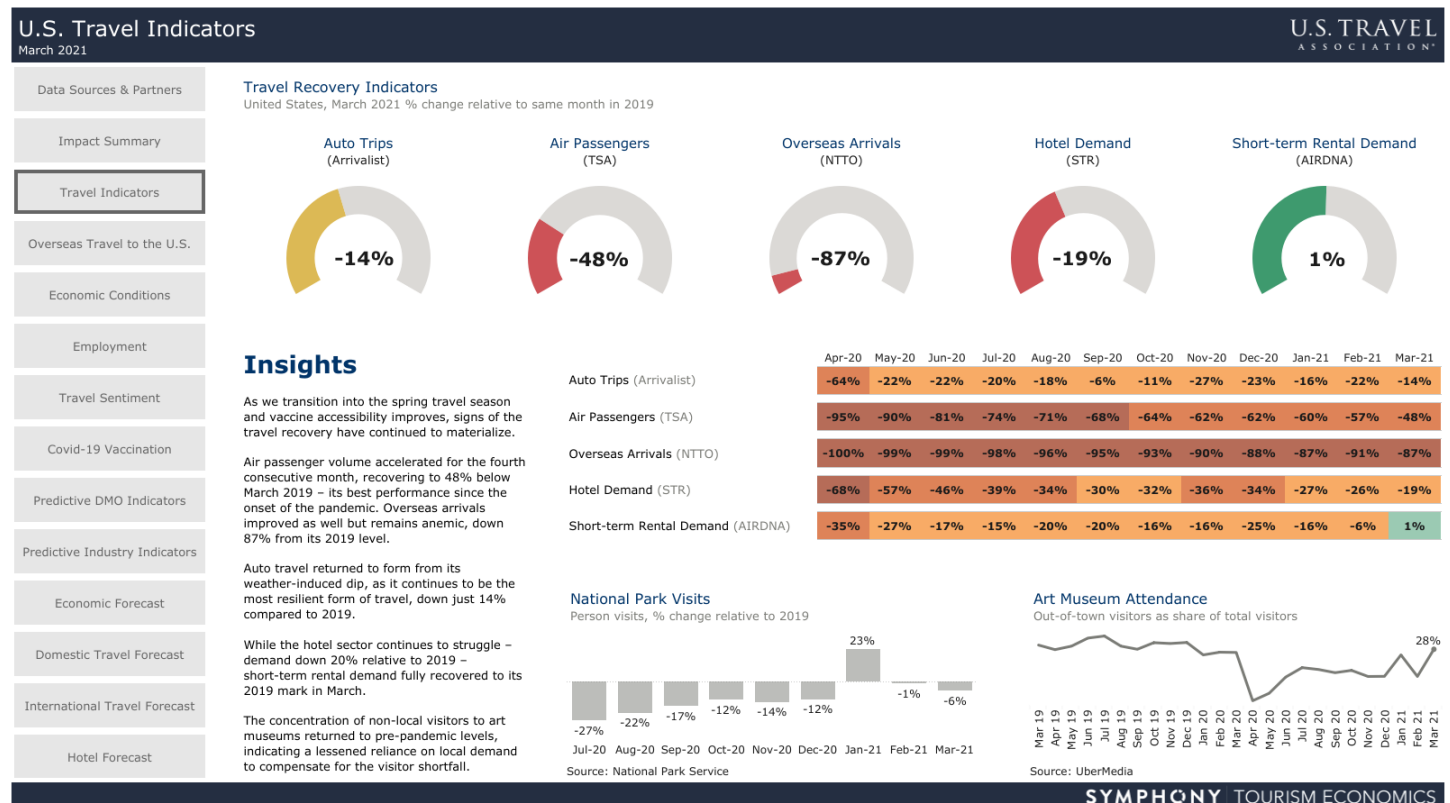


(Base: Wave 59 data. All respondents, 1,215 completed surveys. Data collected April 23-25, 2021)

Destination  Analysts
DO YOUR RESEARCH

- Americans are split in their expectations for travel prices this season. While 36.3% agree prices will be low this Summer, 30.6% disagree. Nevertheless, two-thirds of Summer travelers will actively look for discounts and 58.8% say such deals are important to their travel planning.

U.S. Travel Recovery Insights (March 2021)



Research and Analytics Resources

<https://www.ustravel.org/research/travel-recovery-insights-dashboard>

<https://www.trade.gov/data-visualization/covid-19-travel-industry-monitor>

<https://www.travelstats.com/barometer/oregon>

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