

# **Impact of COVID-19 on Travel Industry**

## **June 14<sup>th</sup> 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.

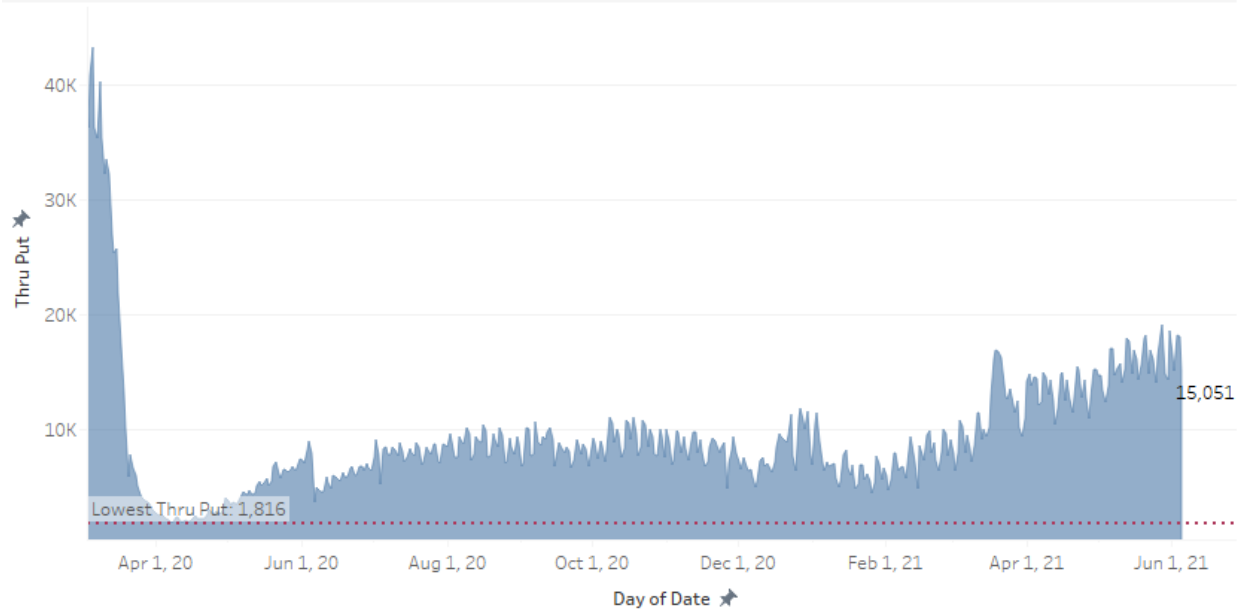
### **PDX Airport Data**

After alerting the Port to some data discrepancies in their reports, I have updated the figures to reflect the recent results. I've also swapped out the historical 2020 vs 2021 YOY results chart for a new chart that shows trended data for 2019-2021 to give us a better representation of the YOY results.

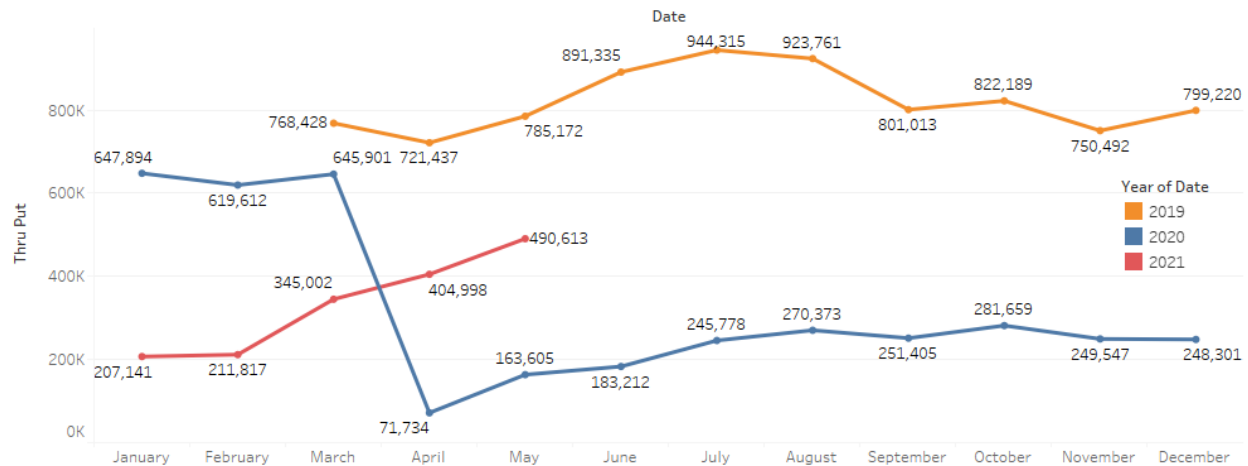
Rather than report out on weekly results, I'm going to focus on monthly results. May 2021 was down -37.5% compared to May 2019. Peak throughput for FY2020-21 was on May 28<sup>th</sup> at 19,089.

## TSA Throughput Data - PDX Airport

3/3/19 to 6/5/21



## Thru Put - Actuals



## STR Weekly Data (May 30)

Note: Year over year (YOY) percentage changes are more favorable as comparisons have shifted to pandemic-affected weeks from 2020. Analysis focuses on 2021 vs. 2019 comparisons.

### Occupancy

- Overall, Oregon occupancy is down 9% from the same time period in 2019
- This drop in occupancy is driven by the Portland region, which is down almost 30% from 2019

- The Hood/Gorge and Willamette Valley Regions are essentially flat year-over-year (YOY)
- With gains of 7.6% (Eastern Oregon) to 12.6% (Southern Oregon) for the rest of the four regions

#### Rev Par

- RevPar for Oregon is down almost 17% from the same time week in 2019
- The drop in RevPar for the state is driven by Portland, which is down nearly 50%
- By contrast, both Southern Oregon and the Coast have really strong gains in RevPar vs. 2019 at +27% and +22% respectively

#### Revenue

- Overall, Oregon is down 15% since the same time period in 2019
- The loss in revenue is driven by the Portland region, which has taken the brunt of the lodging revenue hit for the state (down nearly 50% vs. 2019)
  - For this same week in 2019, the revenue from the Portland Region hotels comprised nearly 48% of the lodging revenue for the state vs. only 29% in 2021
- Hood/Gorge is essentially flat since 2019
- Both Southern Oregon and the Coast are up way up +27% vs. 2019
- And, Central Oregon and Eastern Oregon show strong results vs. 2019 at +15% and +11% respectively

OREGON LODGING STATISTICS Current Week: May 30, 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	63.8%	66.5%	-11.2%	\$120.44	32.5%	-6.5%	\$76.79	120.6%	-16.9%
Central	72.4%	64.5%	3.5%	\$146.51	46.3%	4.9%	\$106.01	140.8%	8.6%
Coast	65.7%	46.9%	4.0%	\$142.56	37.1%	18.1%	\$93.62	101.4%	22.8%
Eastern	69.7%	61.3%	2.4%	\$91.38	16.1%	3.2%	\$63.68	87.4%	5.6%
Hood/Gorge	70.7%	99.0%	-4.7%	\$120.41	27.6%	0.1%	\$85.15	153.9%	-4.6%
Portland	54.8%	97.6%	-31.9%	\$108.53	23.2%	-26.4%	\$59.46	143.5%	-49.9%
Southern	78.2%	61.9%	12.9%	\$115.68	42.1%	13.0%	\$90.49	130.1%	27.7%
Willamette Valley	63.2%	54.7%	-2.7%	\$112.17	31.5%	3.6%	\$70.85	103.3%	0.8%

Region	Room Supply			Room Demand			Room Revenue (\$)		
		% Chg vs 2020	% Chg vs 2019		% Chg vs 2020	% Chg vs 2019		% Chg vs 2020	% Chg vs 2019
Oregon	486,878	7.9%	2.5%	310,421	79.8%	-9.0%	\$37,386,746	138.1%	-14.9%
Central	41,566	5.5%	6.0%	30,076	73.6%	9.7%	\$4,406,540	154.0%	15.2%
Coast	79,438	2.5%	3.6%	52,167	50.5%	7.7%	\$7,437,052	106.4%	27.1%
Eastern	34,657	0.7%	5.1%	24,152	62.4%	7.6%	\$2,206,918	88.6%	11.0%
Hood/Gorge	16,135	0.8%	4.2%	11,410	100.5%	-0.7%	\$1,373,840	155.9%	-0.6%
Portland	179,914	17.8%	2.8%	98,566	132.9%	-29.9%	\$10,697,633	186.9%	-48.5%
Southern	60,065	-1.0%	-0.3%	46,981	60.3%	12.6%	\$5,434,987	127.8%	27.3%
Willamette Valley	77,098	8.2%	3.3%	48,699	67.4%	0.6%	\$5,462,434	120.1%	4.1%

Source: STR

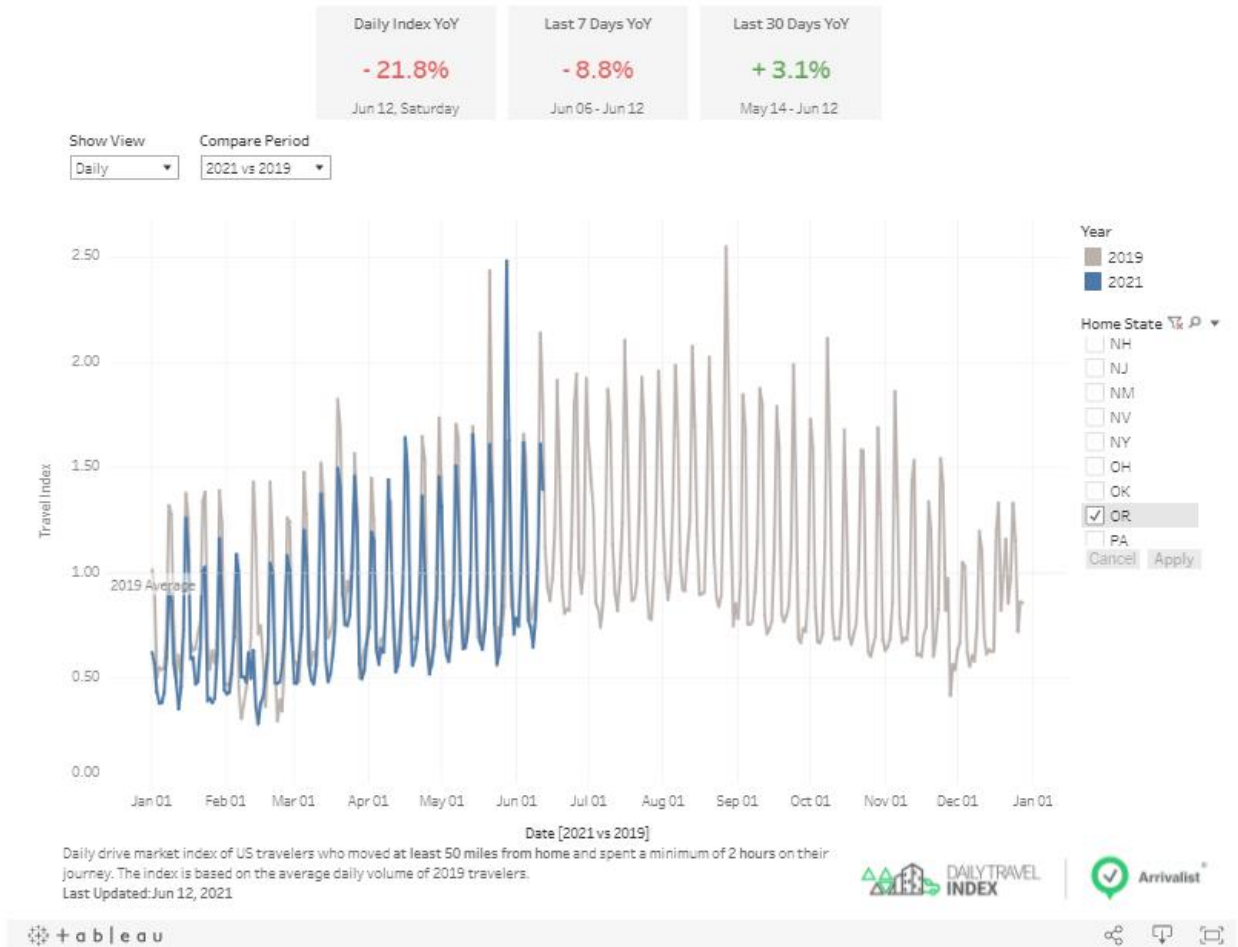
#### ARRIVALIST Daily Travel Index (June 12, 2021)

- Road trips in Oregon increased by +3.1% in over the past month (May14th to June 12th) compared to the average daily volume for the same time period in 2019

- Oregon is behind when compared to the overall US increase of +10.2%
- Travel volume slowed down in last 7 days (-8.8%)

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.*

As we head to summer, the “great reopening” of the country is here. According to CNN, the “post-pandemic life” will include roaring ‘20s parties, canned cocktails and “TikTok mobs.”



In Oregon, the sentiment is much the same with optimism and signs of a slow return to pre-pandemic life abounds as vaccination rates in Oregon inch towards the 70% goal as overall cases and hospitalizations decline. OHA models [currently predict](#) that cases “could drop to about 100 per week” if current transmission rates continue. The state is currently averaging 17,697 vaccine doses per day and more than 2.3 million Oregonians have received at least one dose the vaccine.



**Leana Wen, M.D.**  @DrLeanaWen · May 19

Oregon has it right--honor system can't be trusted. "...businesses that do not want to implement vaccine verification can keep current health & safety measures in place, which includes masks & physical distancing for all individuals." @OregonGovernorBrown



Oregon will require businesses to verify vaccination status if they let cu...  
Business leaders raised concerns that the procedure of verifying  
vaccinations, one of the first of its kind in the country, could be too ...  
 nytimes.com

 994

 354

 817



Most

shared and/or talked about COVID-19 topics in or about Oregon based on CrowdTangle, Keyhole and Cision data include:

- The Governor's [statement](#) announcing the alignment of Oregon's mask guidelines with the CDC and subsequent [asking of businesses to enforce masking for unvaccinated Oregonians](#) elicited widespread confusion, opinions, and frustrations.
- Oregon joined many other states to increase vaccination rates by [announcing a vaccine lottery](#) of a million dollars. Media analysis however shows that the lottery is having [limited impact on rates](#).
- The story [a COVID-19 outbreak](#) at Salem's "People's Church" that sickened 74 worshippers was nationally covered. The church was one of nine that sued the Governor's "Stay Home, Save Lives" order in May 2020.

Other noteworthy articles:

- According to [two new studies](#), immunity to COVID-19 may persist for years to come. Scientists found that immunity elicited by infection and vaccination for the virus could be long-lived.
- With post-pandemic travel bookings rising, there have been many stories tracking this recovery. *TalkWalker* [sentiment predicts](#) that mindful travel, outdoor recreation based trips, road trips and revenge spending will be the rage this summer.

*TravelPerk* blog [predicts](#) that travelers will purchase travel insurance more and that there will be stigma for those who “cough or sneeze” during travel. The return of travel will be “uneven and unpredictable” as restrictions change with changes in seasons and viral variants.

Nevertheless, psychiatrist Andrew Solomon [writes in the NY Times](#) that despite the “dread that accompanies” getting on a plane again, “travel is a liberation” and we will start wandering again.

Finally, the return of travel is probably best captured in this [viral post from Delta Airlines](#) that posted a 435-day old note from a pilot that parked one of its airlines in 2020. The note states:

*“Hey pilots - It’s March 23rd and we just arrived from MSP,” Dennis wrote in the note. “Very chilling to see so much of our fleet here in the desert. If you are here to pick it up then the light must be at the end of the tunnel. Amazing how fast it changed. Have a safe flight bringing it out of storage!”*



Daily Mail US  
@DailyMail

...

## Delta pilot discovers poignant note written by colleague and left inside a grounded aircraft at start of pandemic



Delta pilot finds note written by fellow airman at start of pandemic

A Delta pilot discovered a 435-day old note written by a fellow airman just at the start of the COVID-19 pandemic last year, perfectly capturing the sentiment of ...

[dailymail.co.uk](https://www.dailymail.co.uk)

## National Trends

### Destination Analysts' Travel Sentiment Survey

Highlights from the week of June 14<sup>th</sup>

- **Many Americans are ready to move on from the pandemic:** This week, 43.5% of travelers agree that they personally feel the pandemic is effectively over and they are ready to move on (up from 40.6%). This rising feeling also coincides with an increase in both openness to travel inspiration (69.4% up from 67.4%) and excitement to travel in the near term (73.7% up from 71.9%). Additionally, those who do not feel confident they can travel safely in the current environment is at a record low (15.7%).

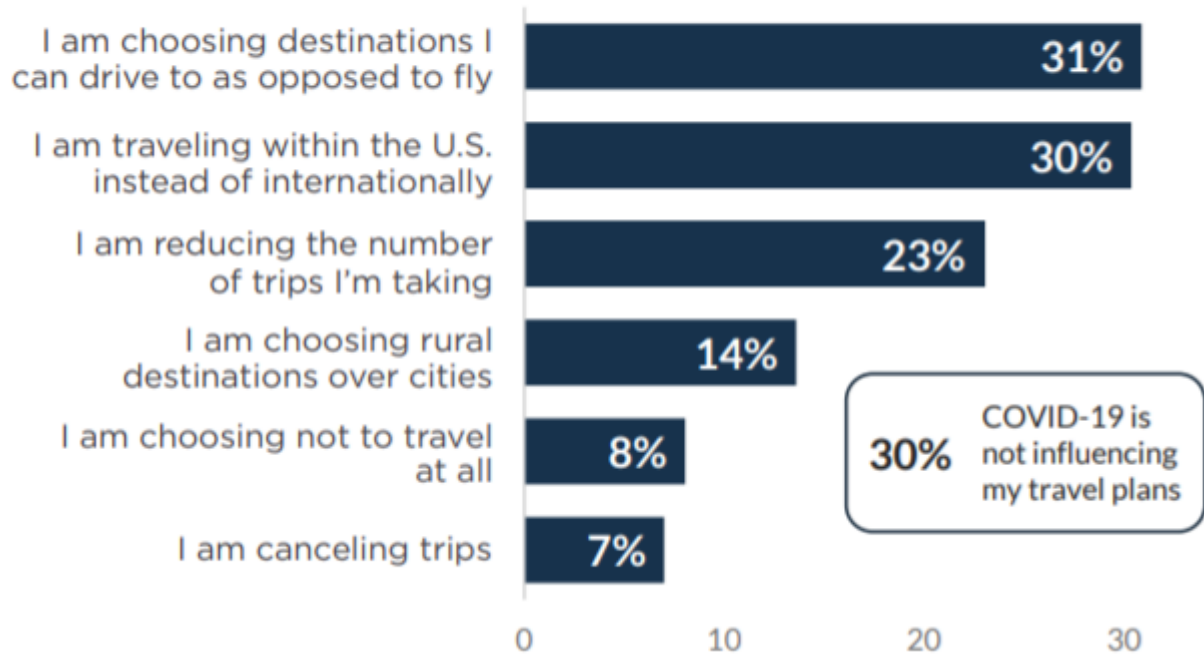
- **American lifestyle changes are coming:** Nearly three-in-ten Americans expect to change their lifestyles post-pandemic. Most commonly, those expecting to make changes feel it is most important for them to find a healthier work/life balance, spend more time with family, be more mindful of their self-care and spend more time with friends. Although less common, some are also looking to get rid of their current romantic partner. In addition, nearly a quarter plan to make changes to the way they travel. Most notably, those anticipating travel habit changes plan to travel more, focus more on outdoor experiences and also be more mindful of travel sustainability.
- **Expectations for vaccinations inch up:** Expectations for adult American travelers to take a vaccine (or have already taken a vaccine) inched closer to the 75% mark. This week 73.9% say they will or have been vaccinated (up from 72.9%). Similarly, parents of school-aged children are increasingly expecting to have their children (or already had their children) take a vaccine—a pandemic-record high of 61.7% up from 59.7% last week.
- **Interest in domestic trips increases:** In fact, 70.9% of travelers who were more internationally oriented (e.g. were more interested in traveling outside the U.S. than traveling domestically pre-pandemic) said the pandemic has opened their minds to traveling more within the U.S.
- **Bookings for lodging accommodations are on the rise:** 18.2% of Americans made travel reservations in the last week. Of these travel bookers, the most common reservation made was for a hotel room (52.7% up from 47.4%). In addition, nearly one-in-five also booked a home-sharing service such as Airbnb or VRBO this week (17.7% up from 13.3%).
- **Relaxation, scenic beauty and new experiences are what Americans most want to get out of their travels in the upcoming year:** Secondarily, Americans will also seek out escapism, food experiences and adventure. Affordability will also be of high importance. In fact, it was among the top three destination attributes they consider very important or essential in regard to the destinations they plan to visit in the next year—after fun and relaxing.

## Longwoods International COVID-19 U.S. Travel Sentiment Survey

Wave 38: June 2, 2021 highlights

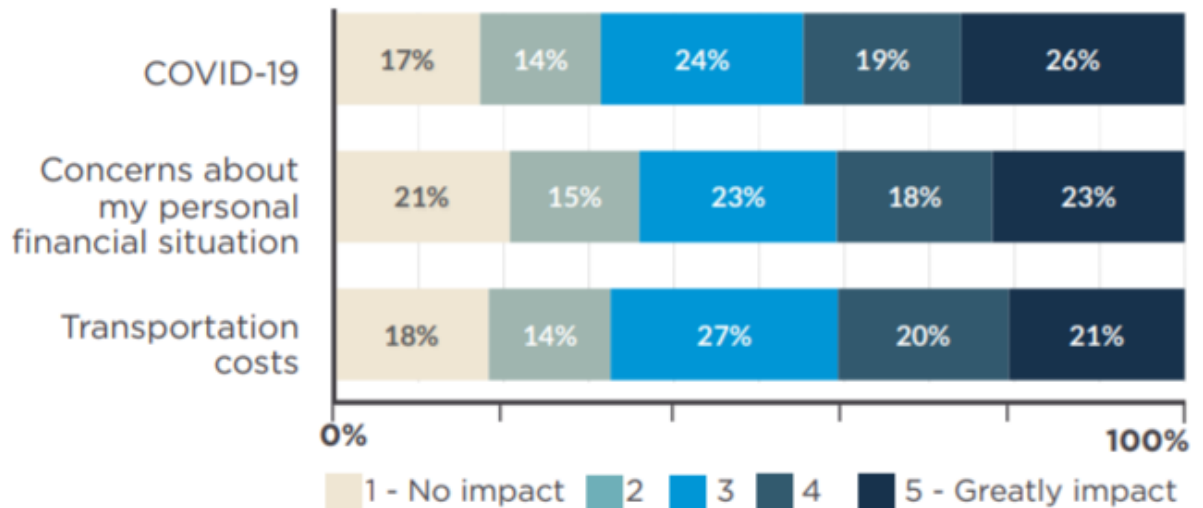
- **TRAVEL PLANS:** As Americans begin traveling for summer vacations (90% have travel plans over the next 6 months), **31%** are choosing a destination they can drive to instead of fly, and a similar proportion (**30%**) are substituting domestic travel instead of international trips. Only 8% are choosing not to travel at all while 30% of travelers say that COVID-19 is not influencing their travel plans at all

## INFLUENCE OF COVID-19 ON TRAVEL PLANS IN THE NEXT SIX MONTHS



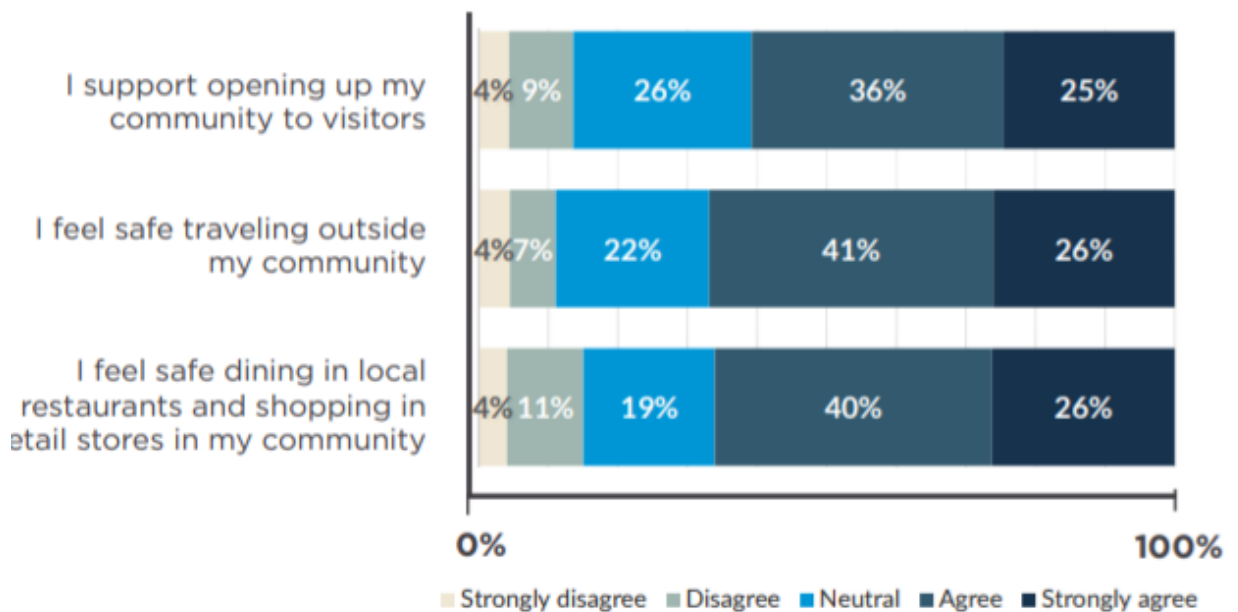
- **FACTORS IMPACTING TRAVEL:** Less than half of U.S. travelers indicated COVID-19 would have some impact on travel decisions in the next six months, and only about one-quarter (26%) indicated that COVID-19 will greatly impact their travel plans. 23% of travelers said concerns about their personal financial position would greatly impact their travel plans while 21% said the same in regards to transportation costs

## FACTORS IMPACTING DECISIONS TO TRAVEL IN THE NEXT SIX MONTHS



- CONFIDENCE IN TRAVEL & TRAVELERS:** The indications of confidence in travel and travelers continues to improve as vaccination rates increase and case numbers decline. 61% of Americans are in support of opening up their communities to visitors. 67% of U.S. travelers also feel safe traveling outside of their communities and 66% feel safe dining or shopping locally, both up from two weeks ago

## PERCEPTIONS OF SAFETY AND TRAVEL



## Research and Analytics Resources

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

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

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

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