



COVID-19 Research Dashboard

July 23 Report

About the COVID-19 Research Dashboard

- The COVID-19 Research Dashboard is a summary compilation of weekly and monthly statistics from a variety of Visit California and third-party data sets:

Visit California

STR

AirDNA

TravelClick

ForwardKeys

Destination Analysts

SMARInsights

Tourism Economics

Third-Party

COVID Tracking Project

COVID Act Now

California Dept of Public Health

Department of Labor

Google





Los Angeles Times

New York Times

- The data enclosed is updated weekly and intended to provide insight on the current status of recovery for the travel industry across these key indicators:
 - ✓ Public Health
 - ✓ Consumer Sentiment
 - ✓ Air and Lodging Booking
 - ✓ Economic

Executive Summary

Current Status: Recovery Phase

Public Health Indicators		Lodging/Airline Indicators	
<ul style="list-style-type: none">Both cases and deaths continue to trend up across much of the country.California remains at risk with 30 counties currently being monitored due to elevated metrics, but the week-over-week increases have slowed. The increase for the week ending July 19 was 5%, down from a high of 50% just three weeks ago.		<ul style="list-style-type: none">Statewide room demand is down 46 percent versus the same time a year ago. Demand rose 4% compared to a week ago.Future air bookings continue to lag far below year ago levels for the coming months.	
Consumer Sentiment Indicators		Economic Indicators	
<ul style="list-style-type: none">Most national consumer sentiment measures remain at the low levels they fell to in the past three weeks.		<ul style="list-style-type: none">Weekly travel spending lags our other indicators by one week.For the week ending July 11, both national and California travel spending declined compared to the prior week, ending a streak of week over week gains.New unemployment claims also ticked back up following two weeks of declines.	

Executive Summary (continued)















Current Status: Recovery Phase

California Consumer Sentiment Snapshot

- Although national consumer sentiment was stable week-over-week, we saw some additional erosion in sentiment among California residents.
- 60% now report a risk-averse mindset, reporting they are staying home and venturing out as little as possible.
- We also saw another drop in anticipation of resuming activities such as dining and non-essential retail shopping, even for a three-month time period.



Key Indicator Matrix

Crisis Stage:	Response	Recovery – Hyper-Local	Recovery – In-State	Recovery – Regional	Recovery – National	Recovery – International	Recovery – Post-Containment
Characteristics:	Travel is counter-indicated due to infection rate and local shelter in place restrictions	California shelter in place restrictions have lifted allowing for support of local businesses	Successful containment post-shelter in place allows for greater in-state travel	Continued successful containment across Western region allows for regional travel	Significant proportions of U.S. have successful containment and new screening protocols allow domestic travel	Significant containment is achieved across international markets and new screening protocols allow int'l travel	New normal is achieved after widespread availability of a vaccine or successful treatment protocols
Public Health Indicators <ul style="list-style-type: none">Case countsShelter in place restrictions							
Consumer Sentiment Indicators <ul style="list-style-type: none">Mindset (SMARInsights)Healthy Travel Index (Destination Analysts)							
Lodging & Airline Indicators <ul style="list-style-type: none">Domestic Air Bookings (leading)Hotel Bookings (leading)							
Economic Indicators <ul style="list-style-type: none">Travel SpendingUnemployment							



Public Health Indicators

- U.S. and California COVID-19 Cases and Deaths
- County COVID-19 Cases and Deaths
- U.S. and California Shelter In Place Status

Weekly COVID-19 Case Data

U.S.

	Week Ending <u>7/19</u>	% Chg <u>(WoW)</u>
Net New Cases:	463,999	+13%
Net Deaths:	5,241	+5%
Cumulative Cases:	3,755,968	+14%
Cumulative Deaths:	132,918	+4%
Positive Test Rate:	8.5	-3%

California

	Week Ending <u>7/19</u>	% Chg <u>(WoW)</u>
Net New Cases:	63,888	+5%
Net Deaths:	668	-3%
Cumulative Cases:	384,692	+20%
Cumulative Deaths:	7,685	+10%
Positive Test Rate:	7.3	-3%

Source: The COVID Tracking Project



California Weekly Net New COVID-19 Cases & Deaths

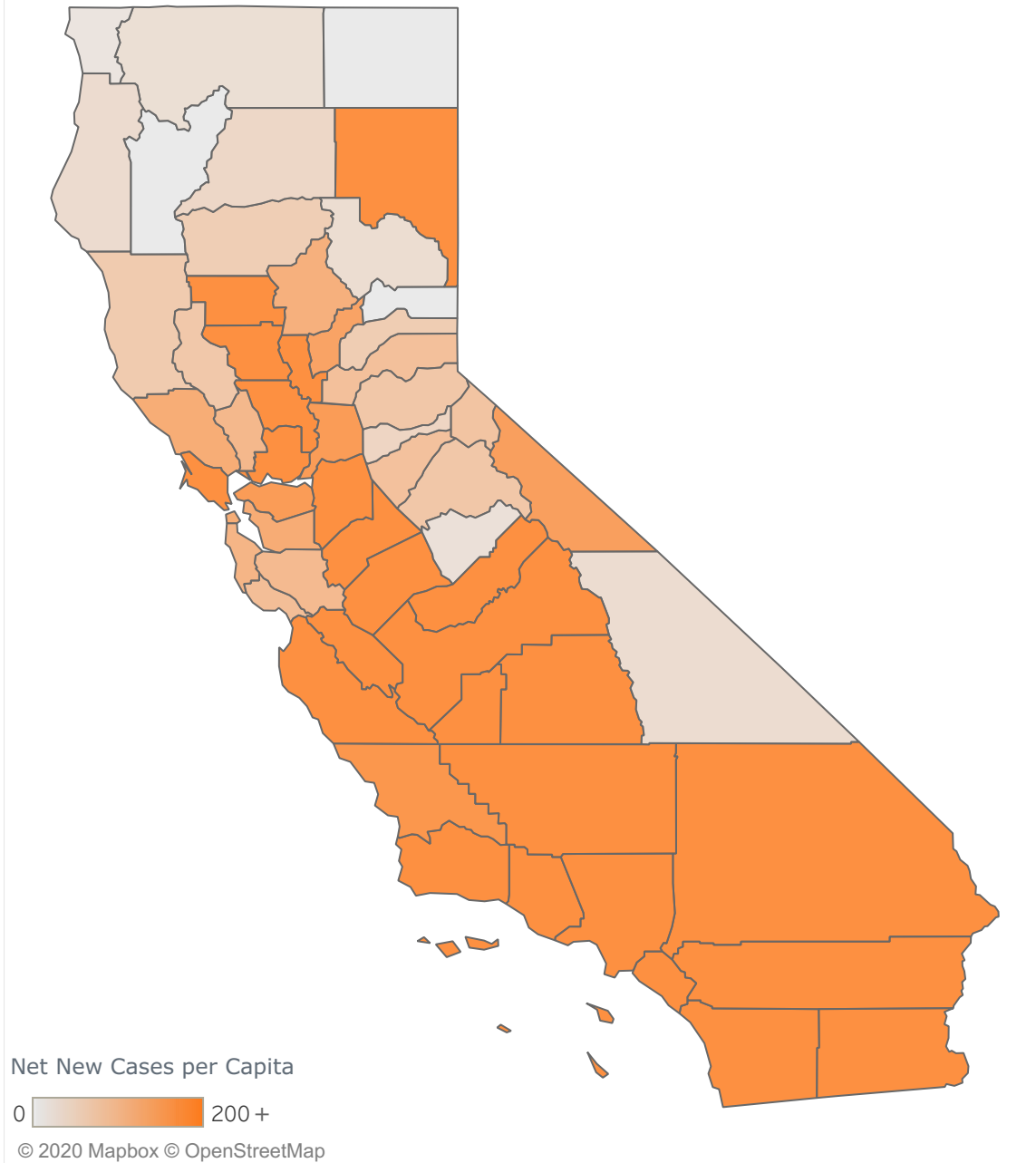
- The first chart shows the weekly net new confirmed cases and deaths in California.
- Week-over-week changes in cases and deaths are shown below to indicate the rate at which California is increasing or decreasing cases/deaths.

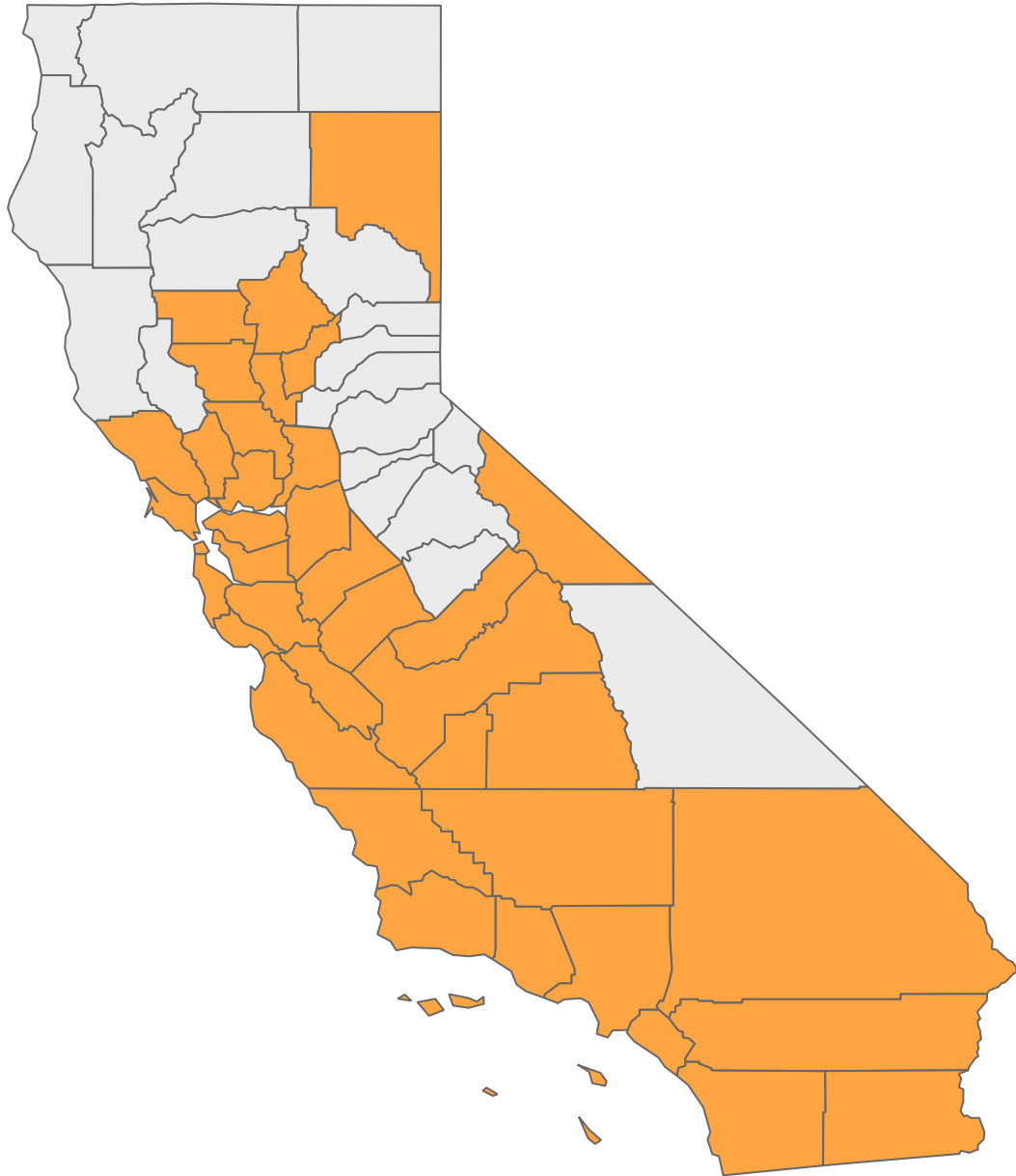
Source: The COVID Tracking Project

California Net New COVID-19 Cases by County in Past 14 Days

- The map shows net new cases per 100,000 people by county. The darker the color the higher number of net new cases per capita in the county.

Source: CDPH





California Counties with 100+ Confirmed Cases per 100,000 People in Past 14 Days

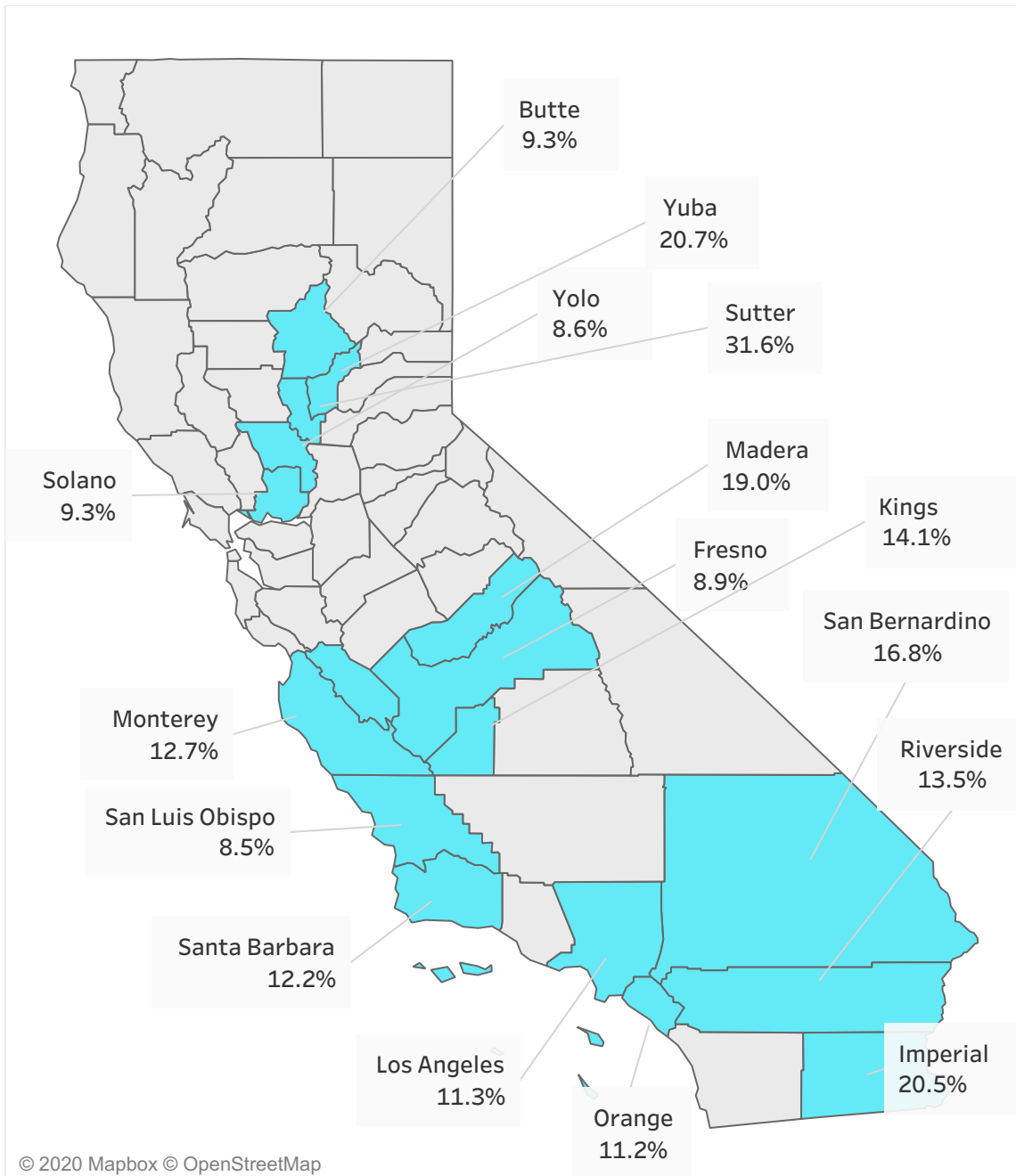
- Counties are monitored for elevated disease transmission if 1) Case rate (per 100,000) >100 OR 2) Case rate (per 100,000) >25 AND testing positivity $>8.0\%$.
- A list of counties who are flagged can be found at:
<https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/COVID19CountyDataTable.aspx>

Source: CDPH

California COVID Positive Test Rate by County (prior week)

- A high positive test rate indicates that there are likely many more undetected positive cases and testing needs to be increased.
- The map shows counties highlighted with a positive test rate equal to or greater than 8%. (Note that the test rate is not available for all counties.)

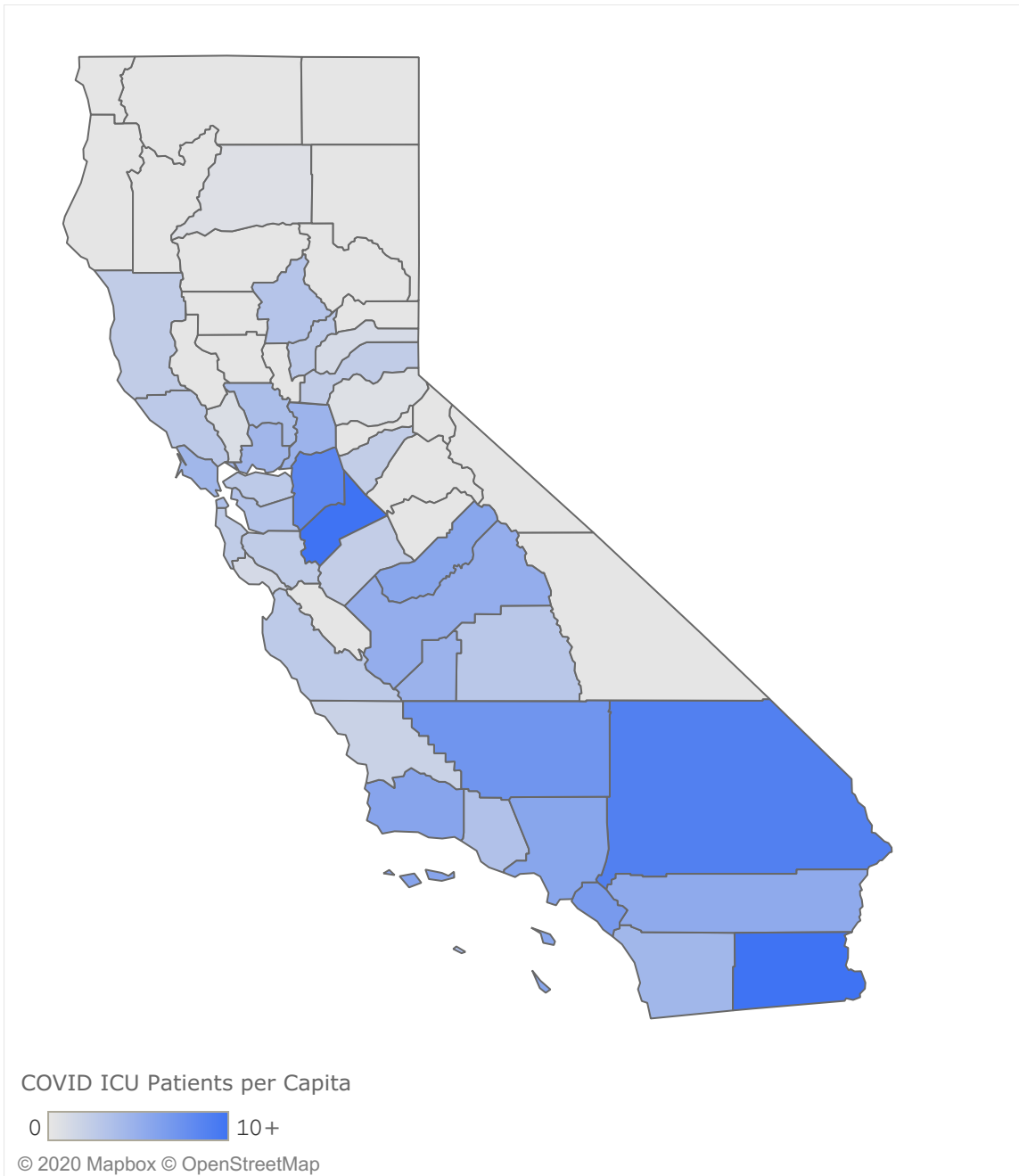
Source: COVID Act Now



California COVID ICU Patients by County

- The map shows COVID ICU hospitalized patients per 100,000 people by county. The darker the color the higher number of patients per capita in the county.

Source: CDPH



California Recovery Stages

As of the current week, many counties in California have moved back into Stage 2, with bars, and indoor dining being paused, as well as indoor portions of other attractions.



Stage 1: Safety and Preparedness
Make workplaces safe for our essential workers.



Stage 2: Lower-Risk Workplaces
Gradually reopen retail (curbside only), manufacturing and logistics. Later, relax retail restrictions, adapt and reopen schools, child care, offices & limited hospitality, personal services.



Stage 3: Higher-Risk Workplaces
Adapt and reopen movie theaters, religious services, and more personal and hospitality services.



Stage 4: End of Stay Home Order
Reopen areas of highest risk: e.g. concerts, conventions, sports arenas.

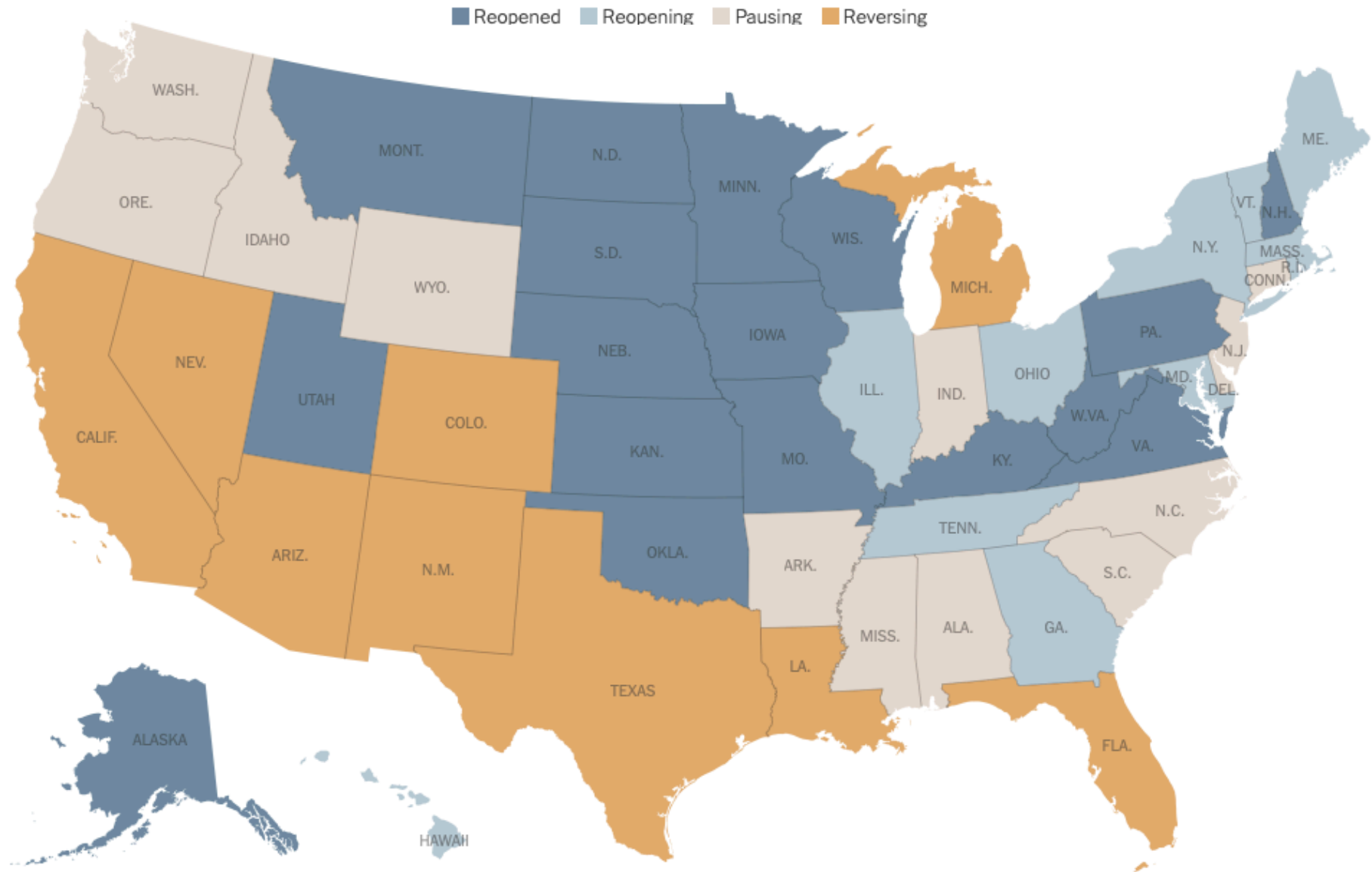
California Shelter in Place/Reopening Status

[Click here to go to county-specific status updates from the Los Angeles Times.](#)

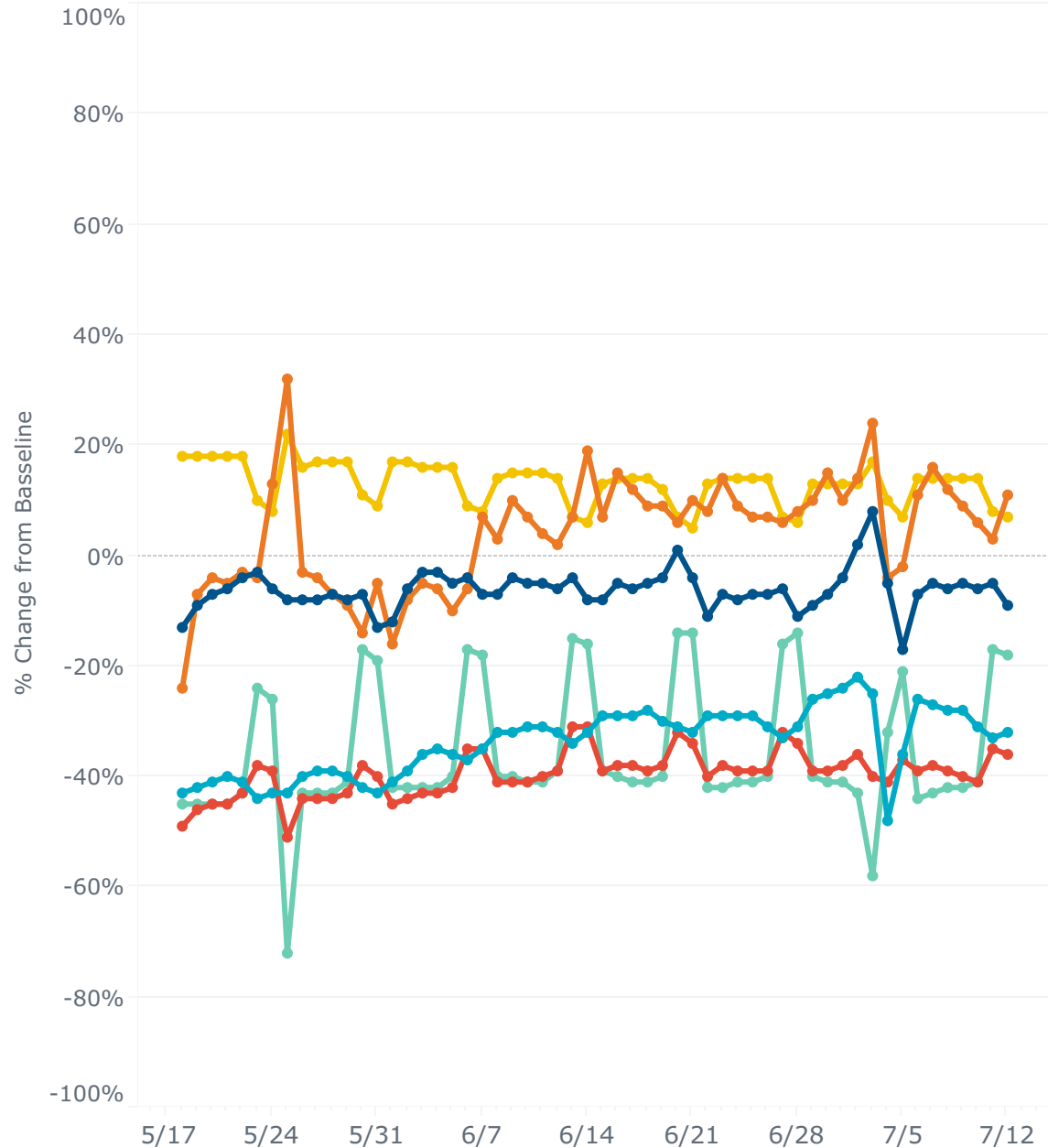


Source: The Los Angeles Times

State Shelter in Place/Reopening Status



■ Grocery & Pharmacy % Chg
 ■ Residential % Chg
 ■ Transit Stations % Chg
■ Parks % Chg
 ■ Retail & Recreation % Chg
 ■ Workplaces % Chg



California Daily Mobility Metrics

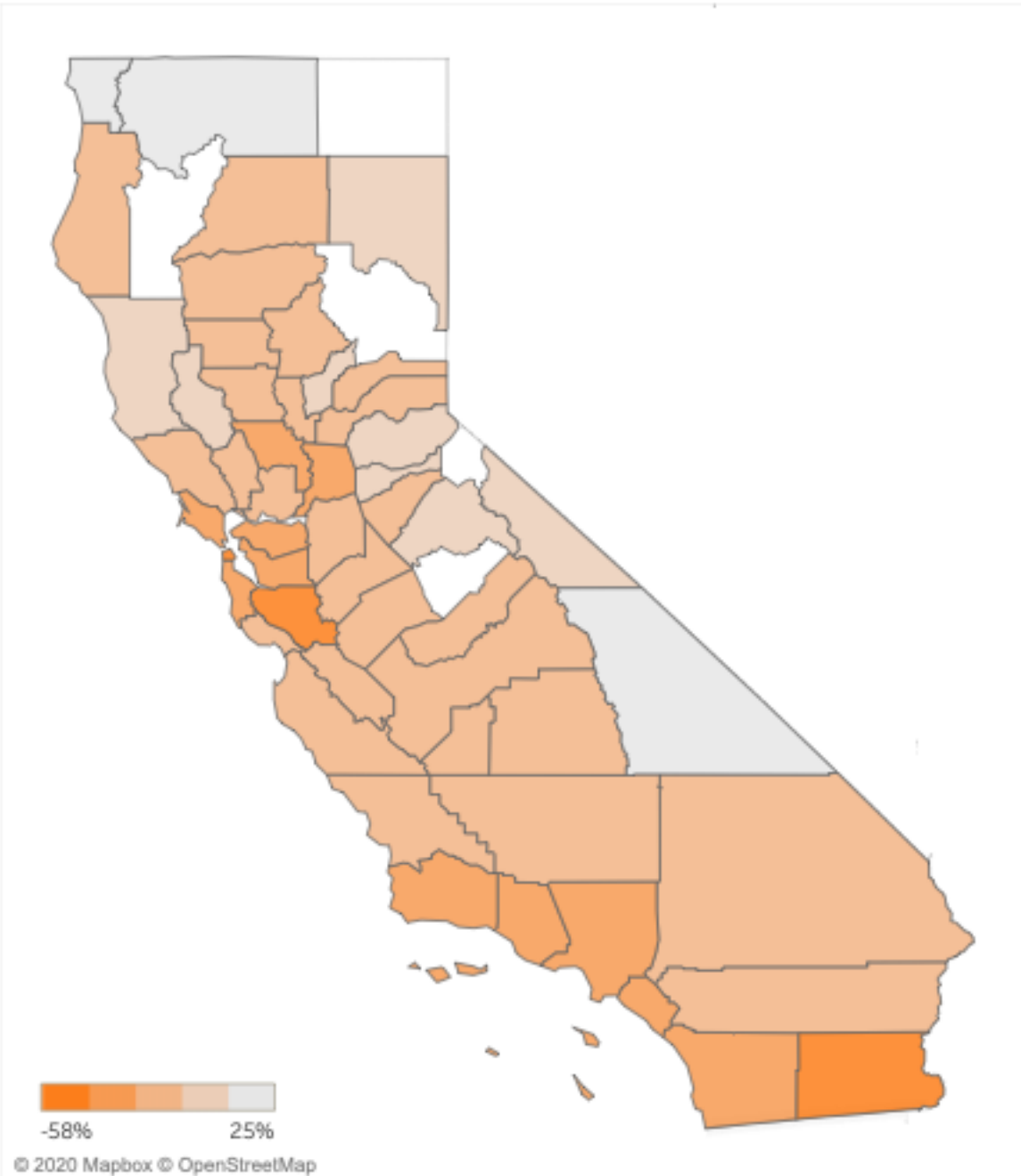
- The chart to the left shows Google Maps daily movement data in California at specific locations, including:
 - Grocery & Pharmacy
 - Parks
 - Residential
 - Retail & Recreation
 - Transit Stations
 - Workplace
- The data can show how movement at these locations is changing over time relative to a baseline and in relation to changes in Shelter-In-Place policies.

Source: Google

California Counties Mobility over Past 7 Days: Retail & Recreation

- The map shows county-level movement compared to the baseline for the Retail & Recreation location segment averaged across the most recent seven days.
- A darker the orange color on the map represents less movement relative to the baseline at the segment locations. Counties shown in white do not have data reported for the week.

Source: Google





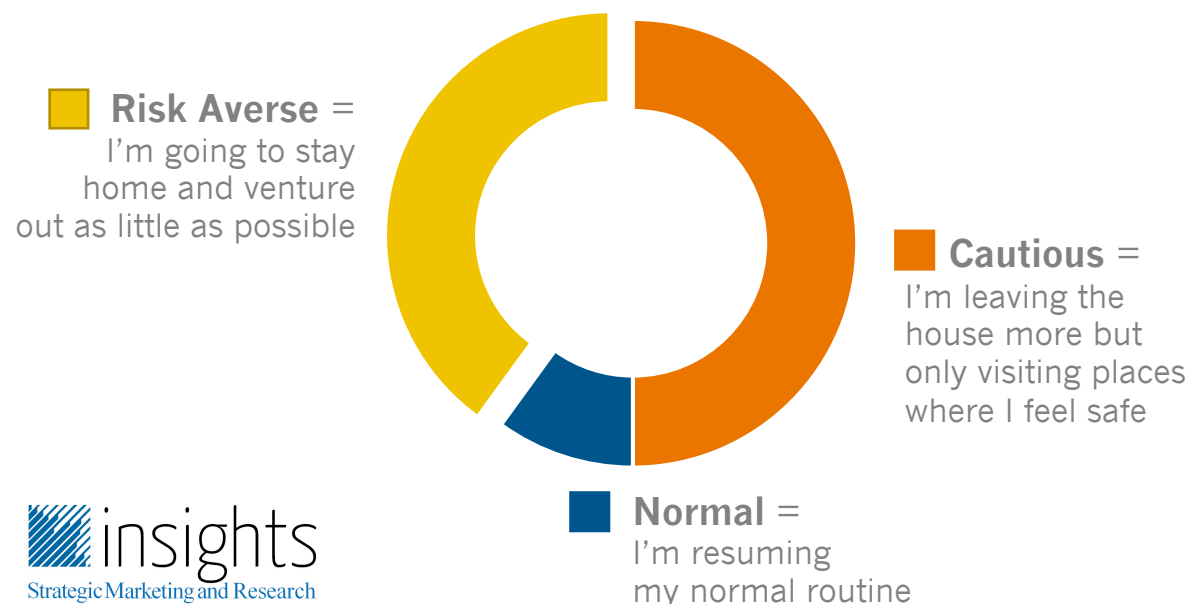
Consumer Sentiment

- U.S. and California Mindset Toward Resuming Activities (SMARInsights)
- U.S. and California Mindset Toward Travel (Destination Analysts)

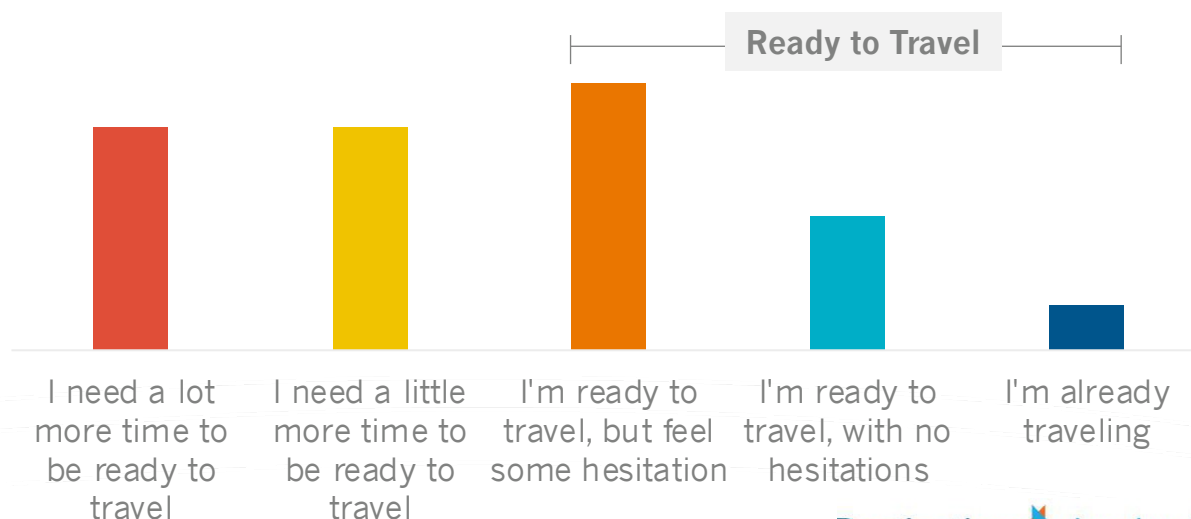
2 Summary Indicators of Consumer Sentiment

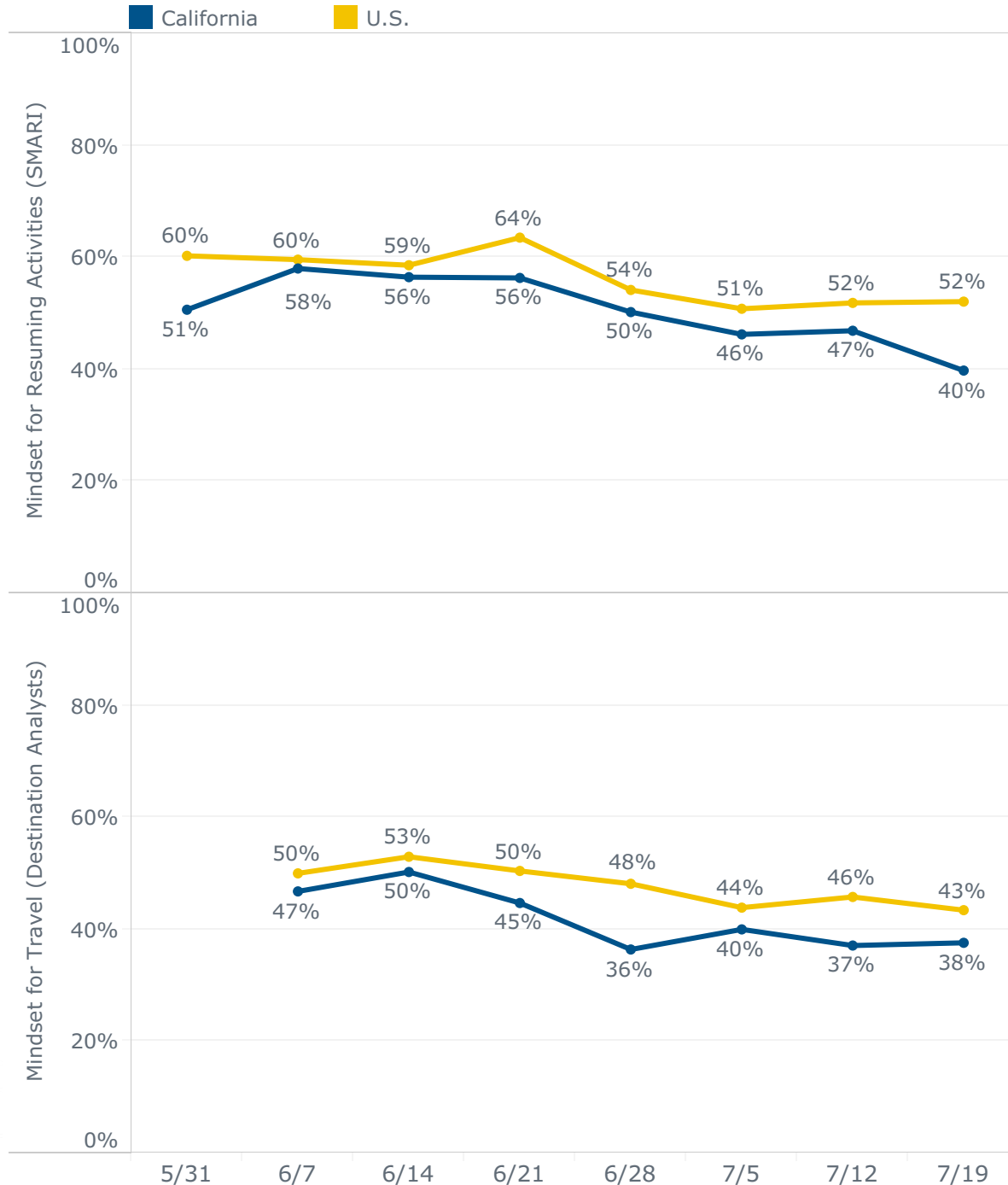
- Mindset Toward Resuming Activities (SMARInsights)
- Mindset Toward Travel (Destination Analysts)

Mindset Toward Resuming Activities (Next Week)



Mindset Toward Travel (Right Now)

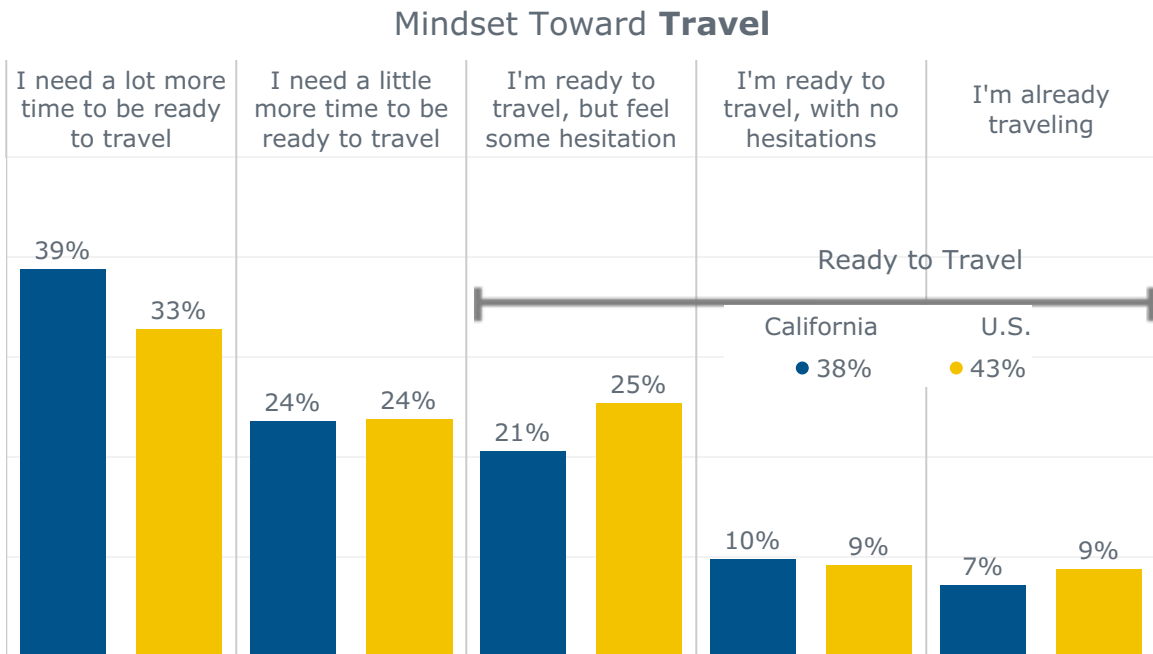
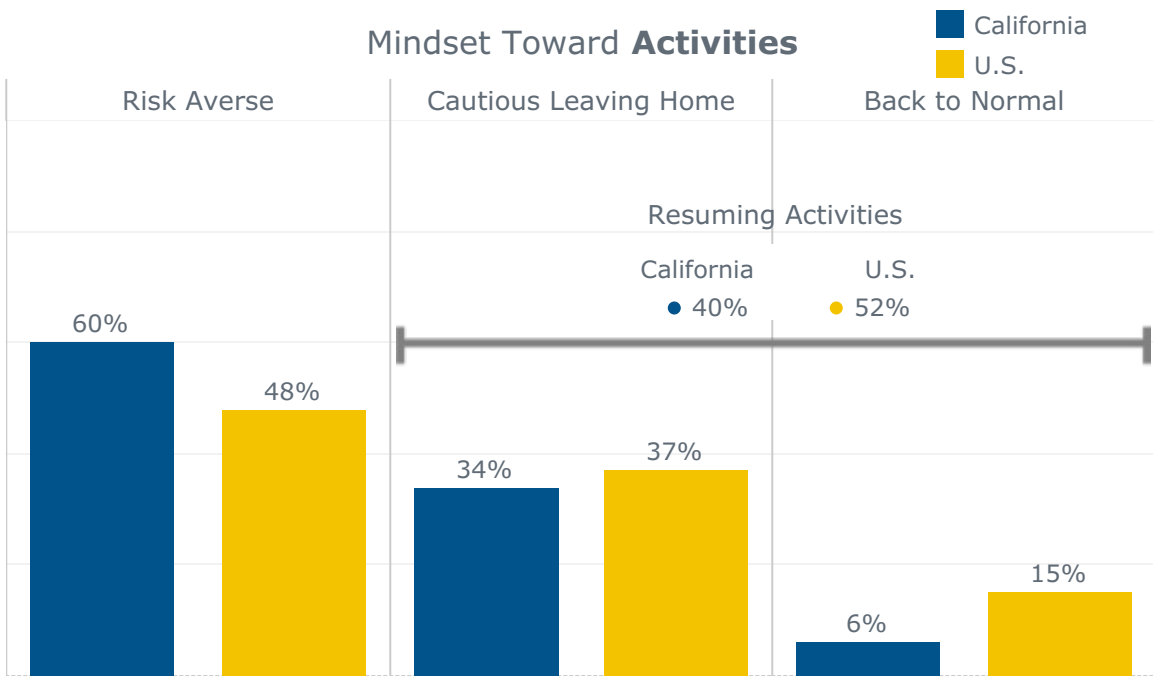




U.S. and California Weekly Consumer Sentiment Indices

- The first chart shows SMARInsights' Mindset Towards Resuming Activities - % Cautious or Resuming Normal Activities. Of the three mindsets, we want to see the Cautious proportion growing as fewer remain Risk Averse.
- The second chart shows Destination Analysts' Mindset Toward Travel - % Who Are Traveling or Are Ready to Travel.

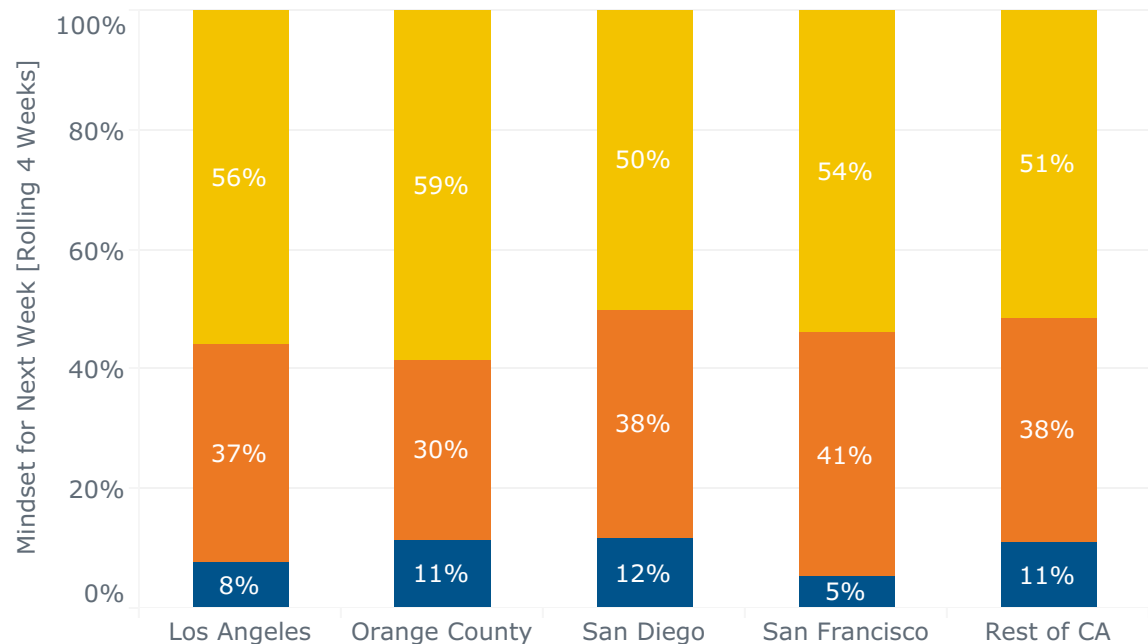
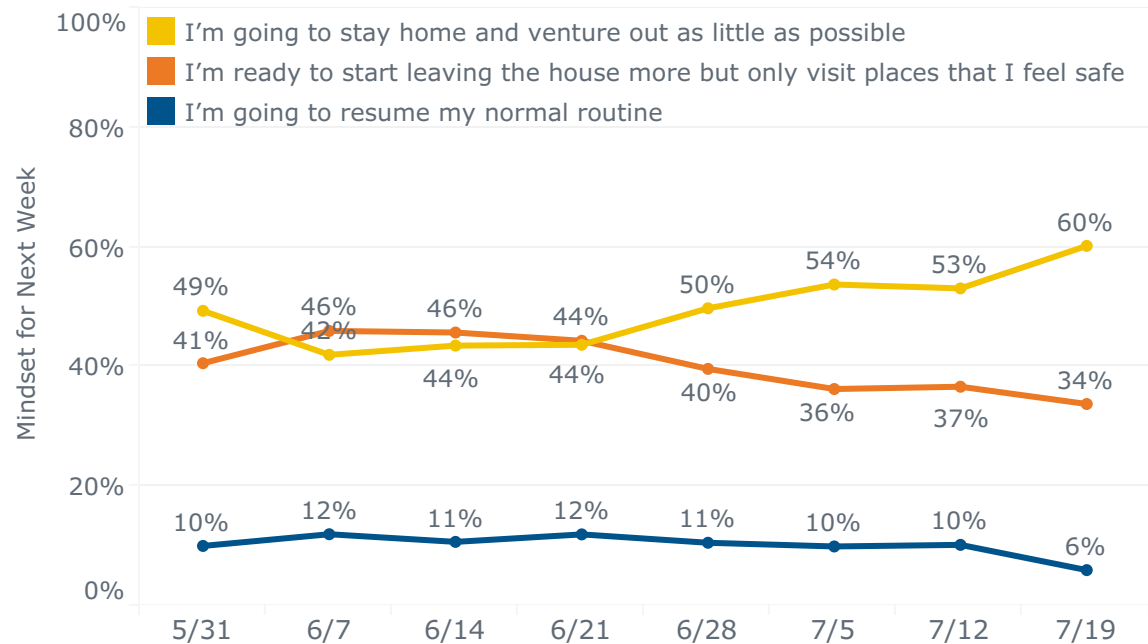
Source: SMARInsights and Destination Analysts



U.S. vs. California Mindsets

- The top chart shows the differences between how Californians are approaching resuming activities outside of the house, vs. the U.S. overall.
- The bottom chart compares how Californians are thinking about travel (not ready, ready, already traveling) compared to the U.S. overall.

Source: SMARInsights and Destination Analysts



Mindset Towards Resuming Activities In Next Week

- Consumers are falling into three distinct categories that describe their current mindset towards resuming activities: the most cautious who are continuing to mostly stay at home; a group who are starting to cautiously venture out; and a small segment who are resuming activities.

Source: SMARInsights Weekly Travel Insights Study



California Snapshot

- Past Week and Future Planned Activities
- Sentiment Towards Tourism/Local Economy

Restaurant / Retail

Dine at a restaurant



Go shopping in a retail store



Outdoors

Take a scenic drive



Visit a park or outdoor recreation area



Visit a beach



Accommodations / Rental Cars

Stay overnight in a hotel / motel



Stay overnight in a hotel / motel



Go camping / glamping / RVing



Rent a car



Past Week and Future Planned Activities (Current Week)

Restaurant/Retail
Outdoors
Accommodations

- As more California communities reopen more parts of the economy, we will see greater participation and growing anticipation of future activities.

Source: SMARInsights Weekly Travel Insights Study

Attractions

Visit a theme or amusement park



Visit a zoo or other outdoor attraction



Visit a museum, gallery, or other indoor attraction



Visit a spa



Visit a casino



Meetings / Events

Attend an in-person conference or meeting



Attend an outdoor venue for a sporting, music, or festival



Attend a sporting, music, or other event at an indoor venue

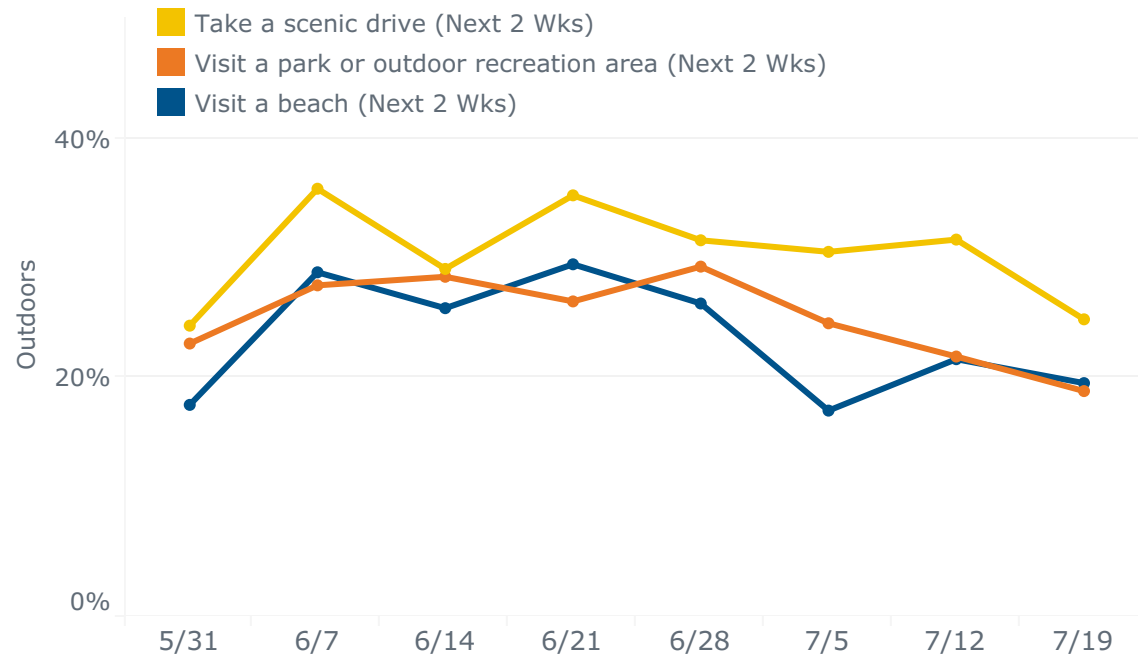
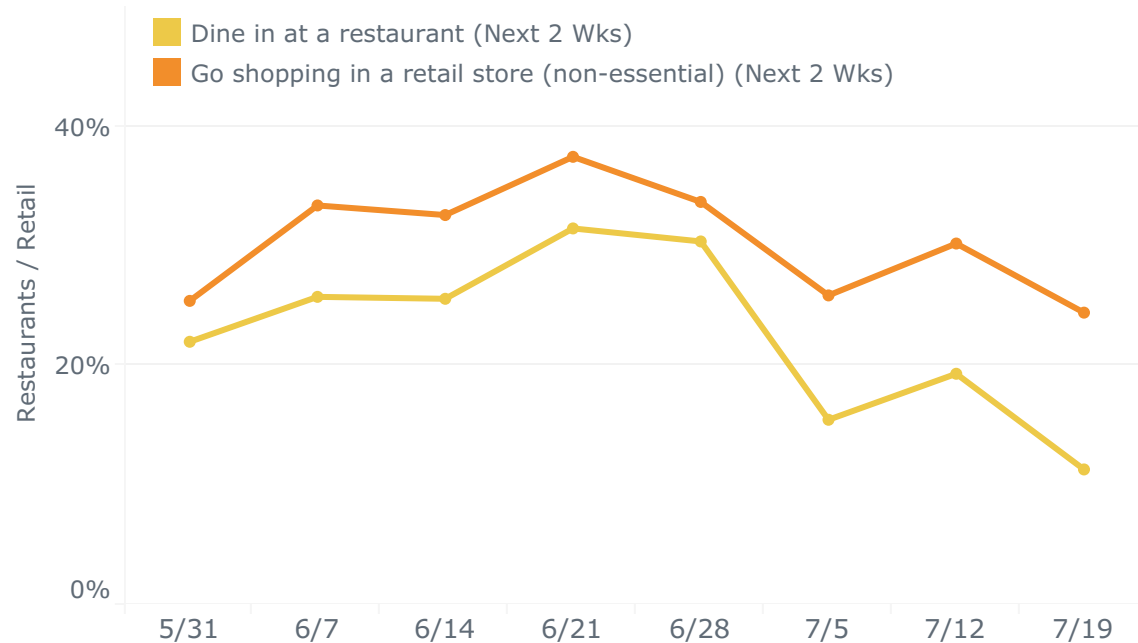


Past Week and Future Planned Activities (Current Week)

Attractions
Meetings/Events

- As more California communities reopen more parts of the economy, we will see greater participation and growing anticipation of future activities.

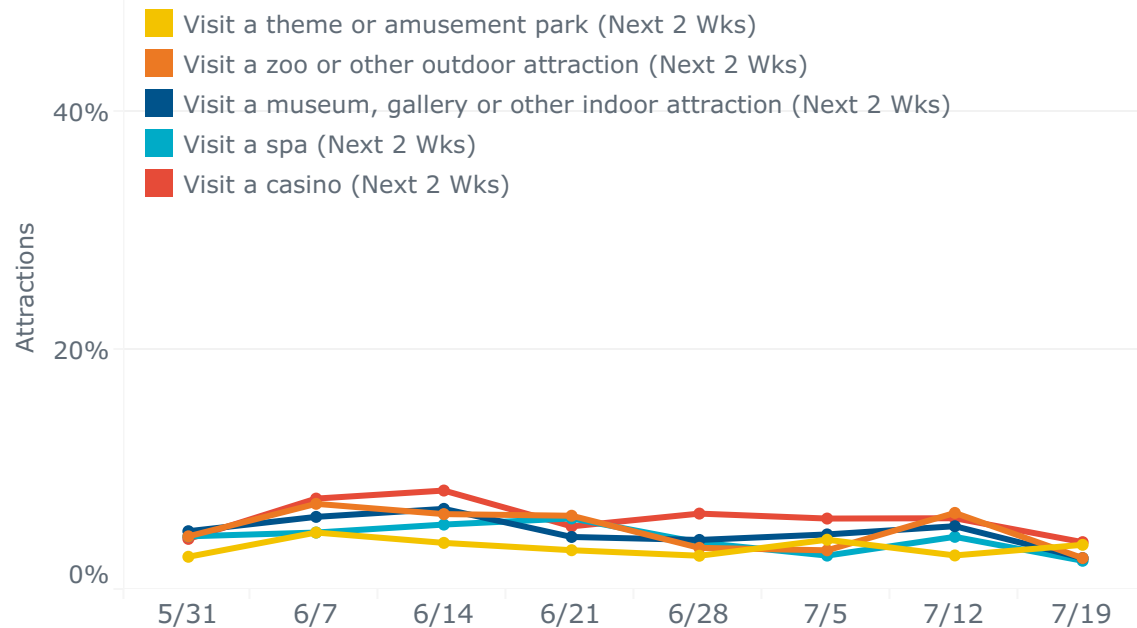
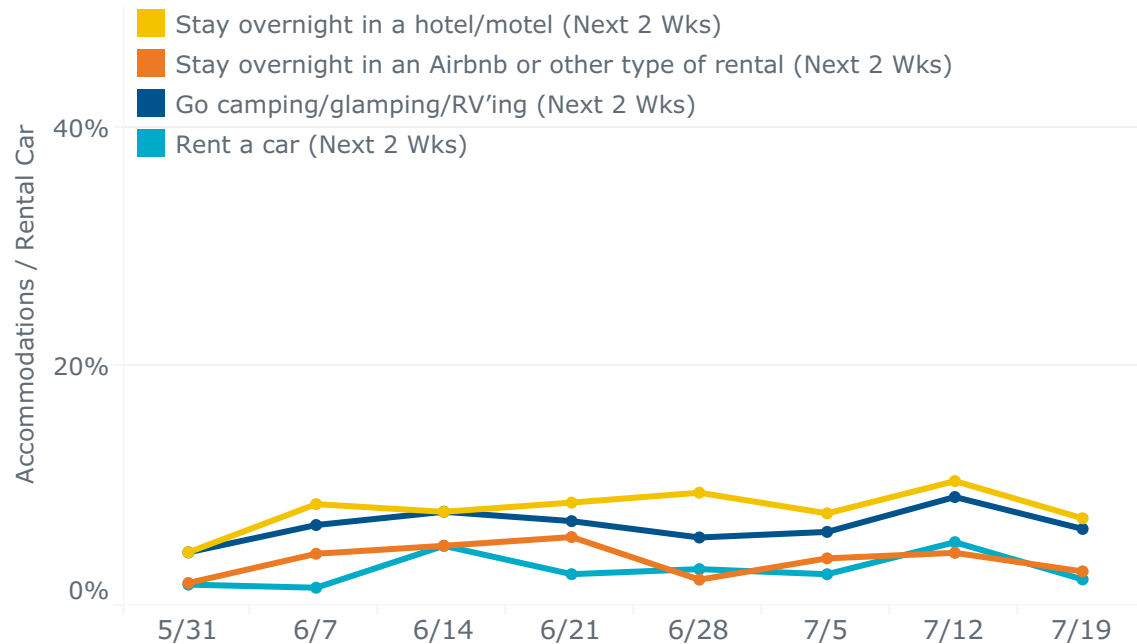
Source: SMARInsights Weekly Travel Insights Study



Activities Planned for Next 2 Weeks (Trend Over Time)

- Restaurant/Retail and Outdoor Activities that Californians plan to do in the next two weeks (trend over time).

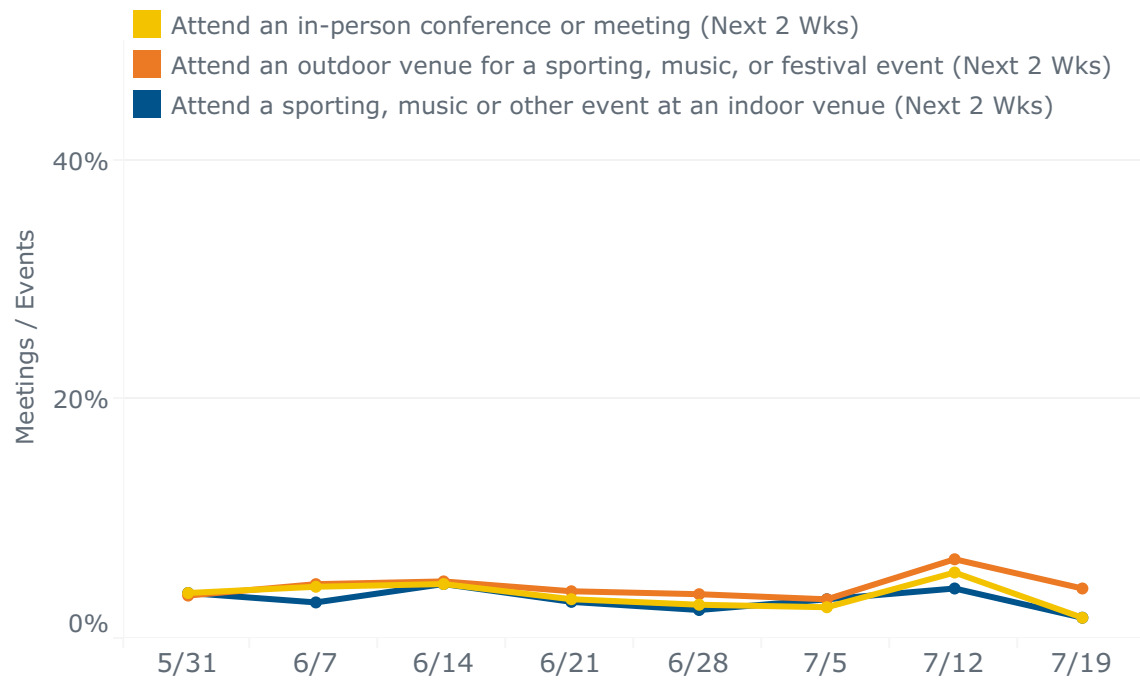
Source: SMARInsights Weekly Travel Insights Study



Activities Planned for Next 2 Weeks (Trend Over Time)

- Accommodations and Attractions Activities that Californians plan to do in the next two weeks (trend over time).

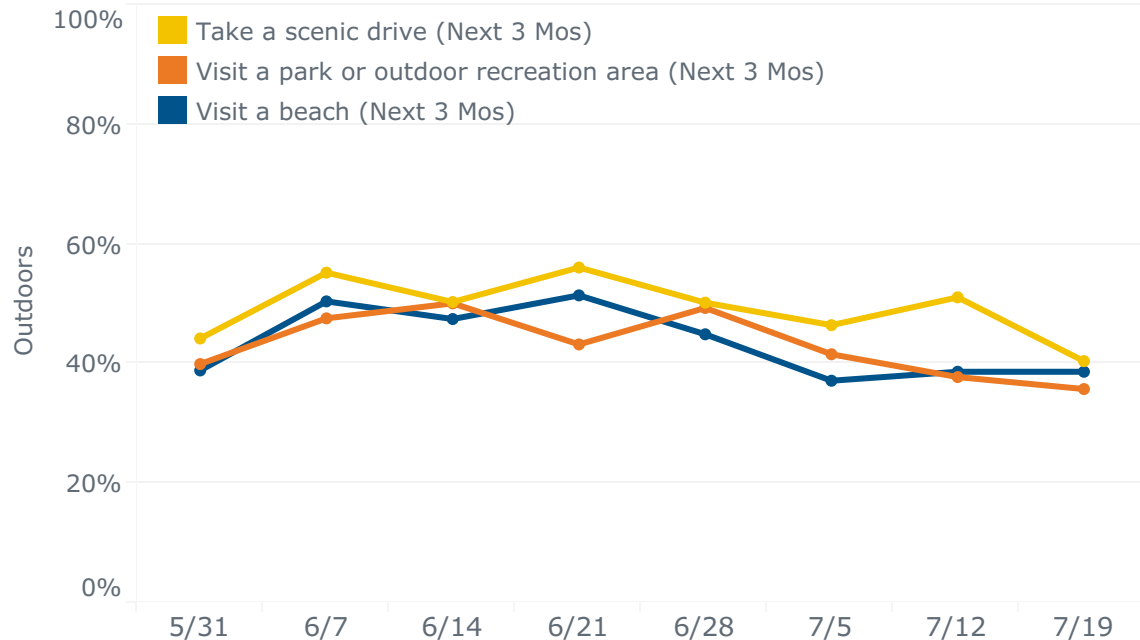
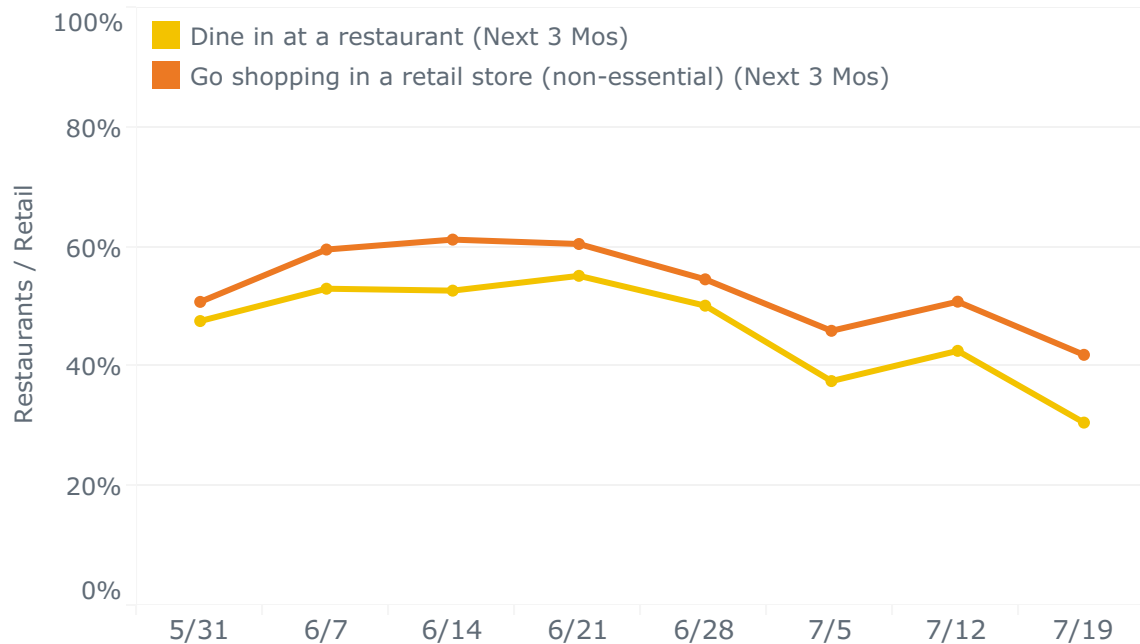
Source: SMARInsights Weekly Travel Insights Study



Activities Planned for Next 2 Weeks (Trend Over Time)

- Meetings and Events Activities that Californians plan to do in the next two weeks (trend over time).

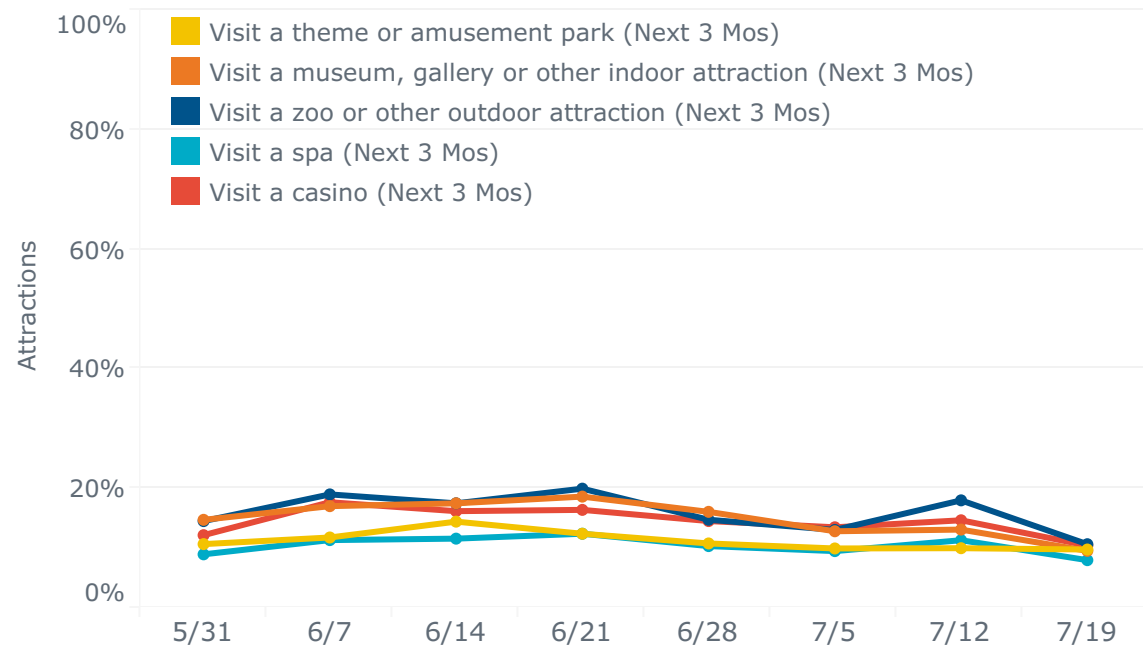
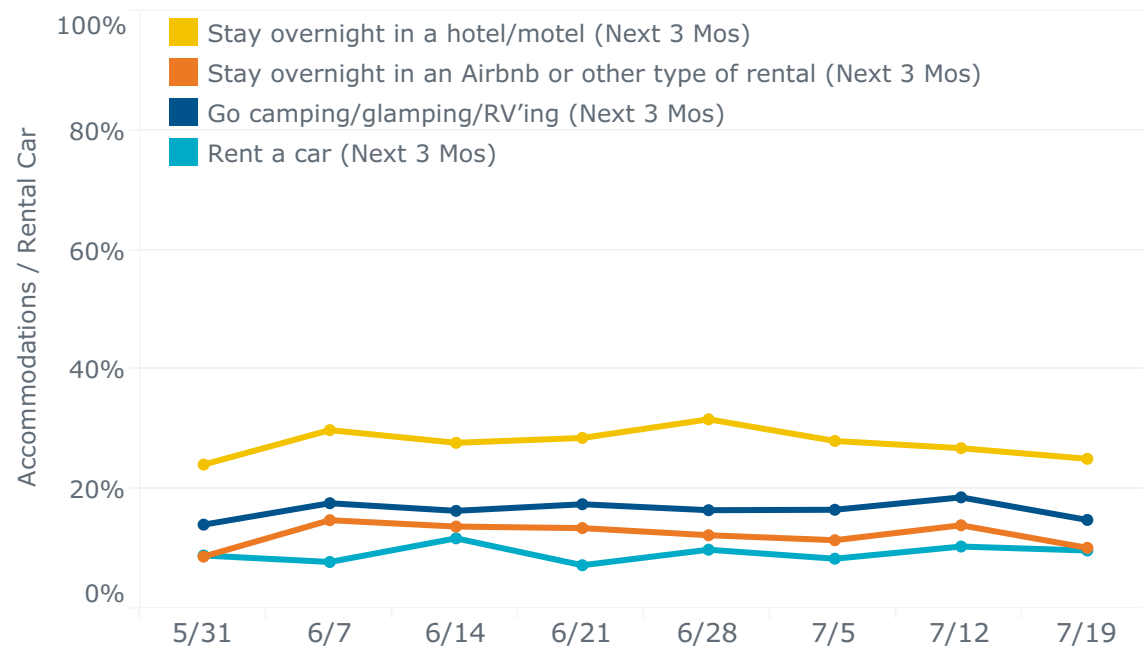
Source: SMARInsights Weekly Travel Insights Study



Activities Planned for Next 3 Months (Trend Over Time)

- Restaurant/Retail and Outdoor Activities that Californians plan to do in the next three months (trend over time).

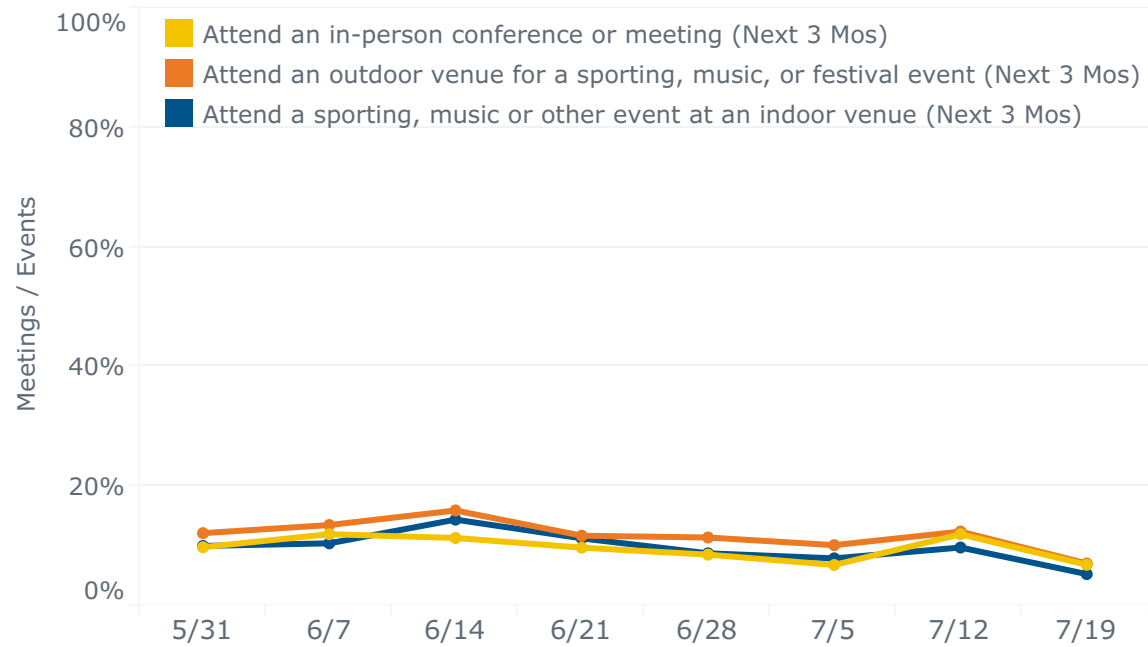
Source: SMARInsights Weekly Travel Insights Study



Activities Planned for Next 3 Months (Trend Over Time)

- Accommodations and Attractions Activities that Californians plan to do in the next three months (trend over time).

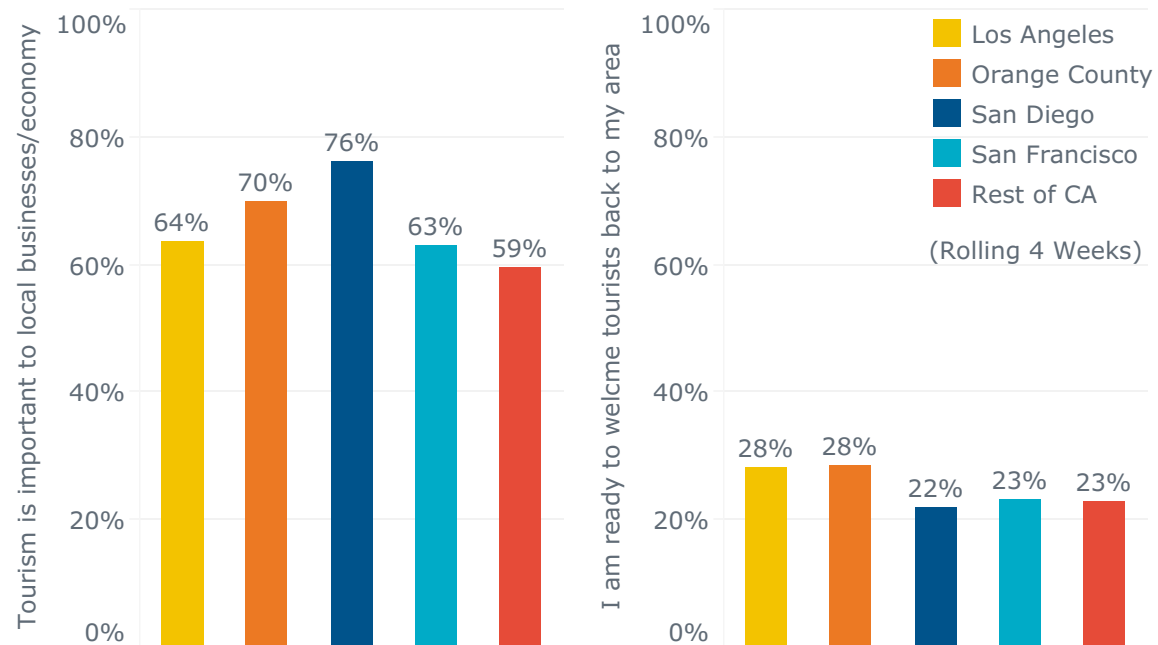
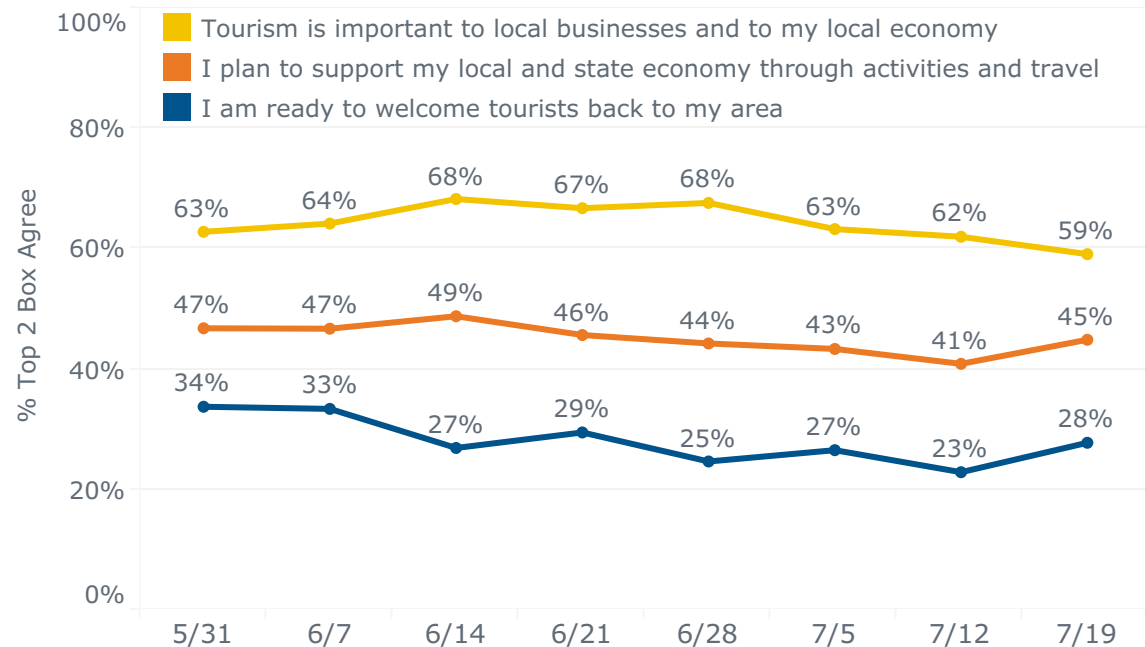
Source: SMARInsights Weekly Travel Insights Study



Activities Planned for Next 3 Months (Trend Over Time)

- Meetings and Events Activities that Californians plan to do in the next three months (trend over time).

Source: SMARInsights Weekly Travel Insights Study



Californian Attitudes Toward Tourism/Local Economy

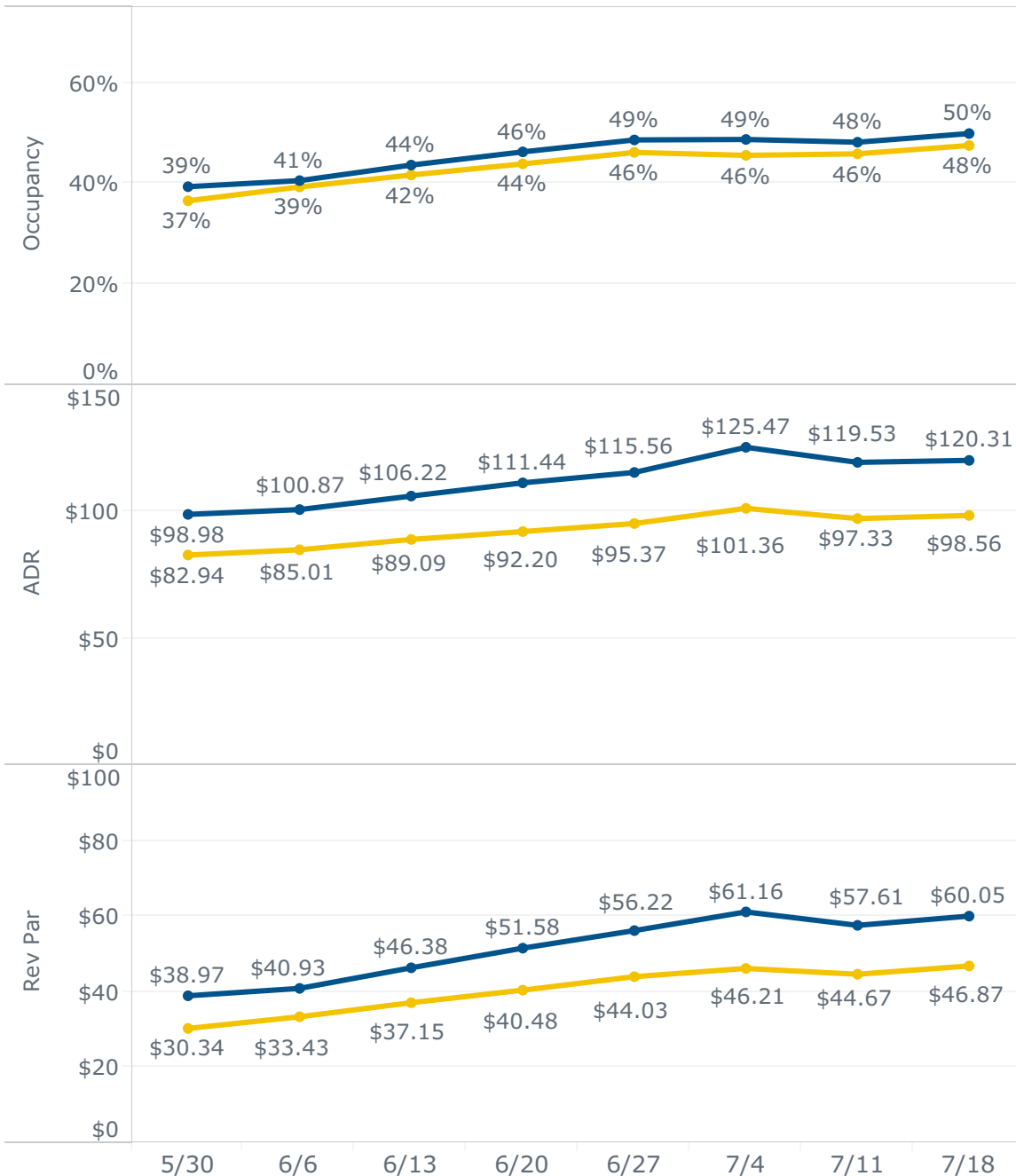
- The percentage of responses in strong agreement with statements related to tourism and the local economy [Top 2 Box Agreement: selecting (5) or (4) out of a five point scale]
- Trend over time and comparison across Gateways and Rest of California

Source: SMARInsights Weekly Travel Insights Study



Air & Lodging Indicators

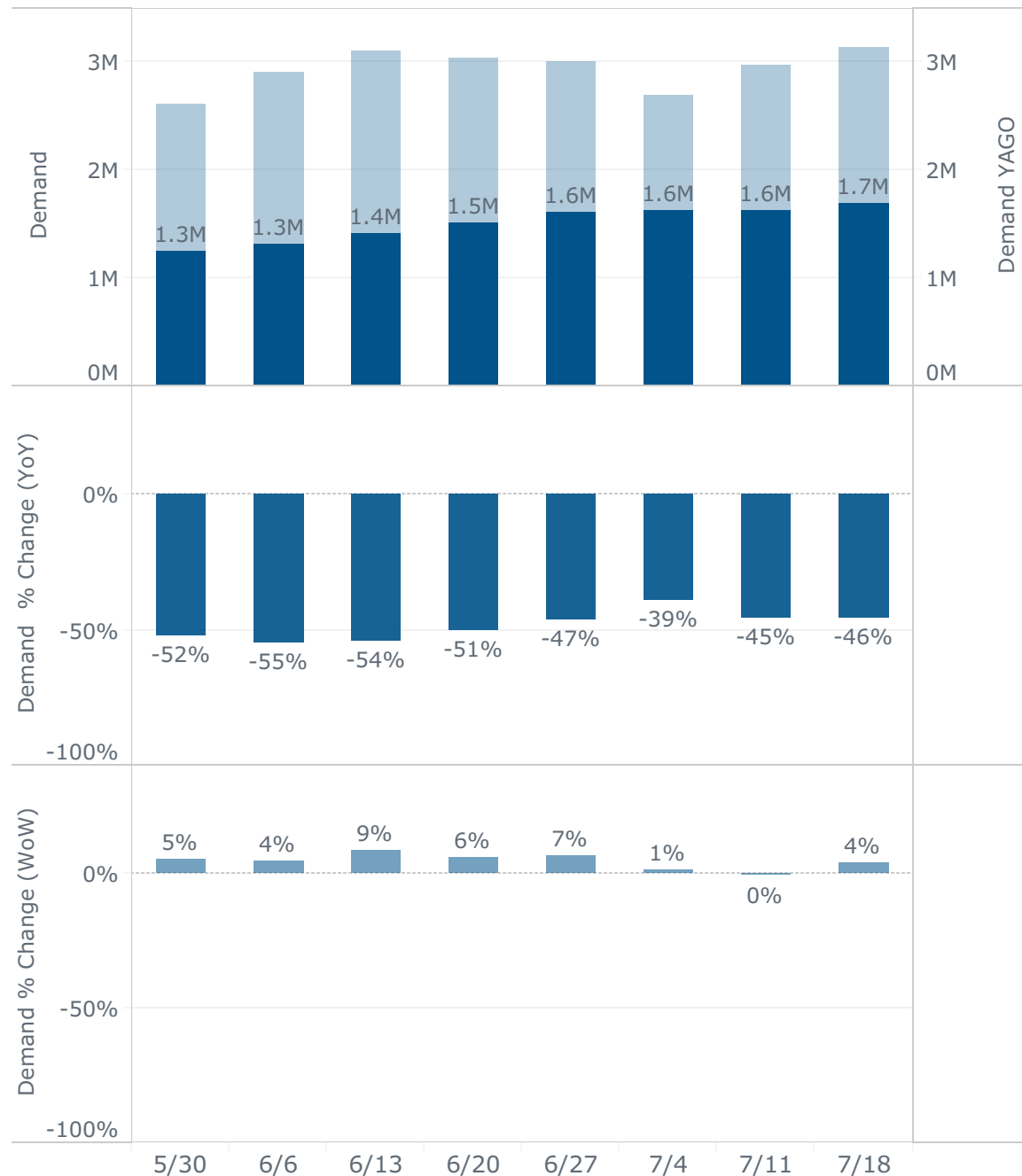
- U.S. and California Occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPar)
- California Lodging Demand
- California Future Lodging and Air Bookings



U.S. and California Weekly Lodging Metrics

- The charts include weekly metrics for:
 - Occupancy
 - ADR
 - RevPar
- Note that hotels closed for at least a calendar month due to the COVID-19 pandemic are marked as “closed” in STR’s census database for that month. Hotels closed for a partial month are still included in supply which impacts the occupancy calculation.

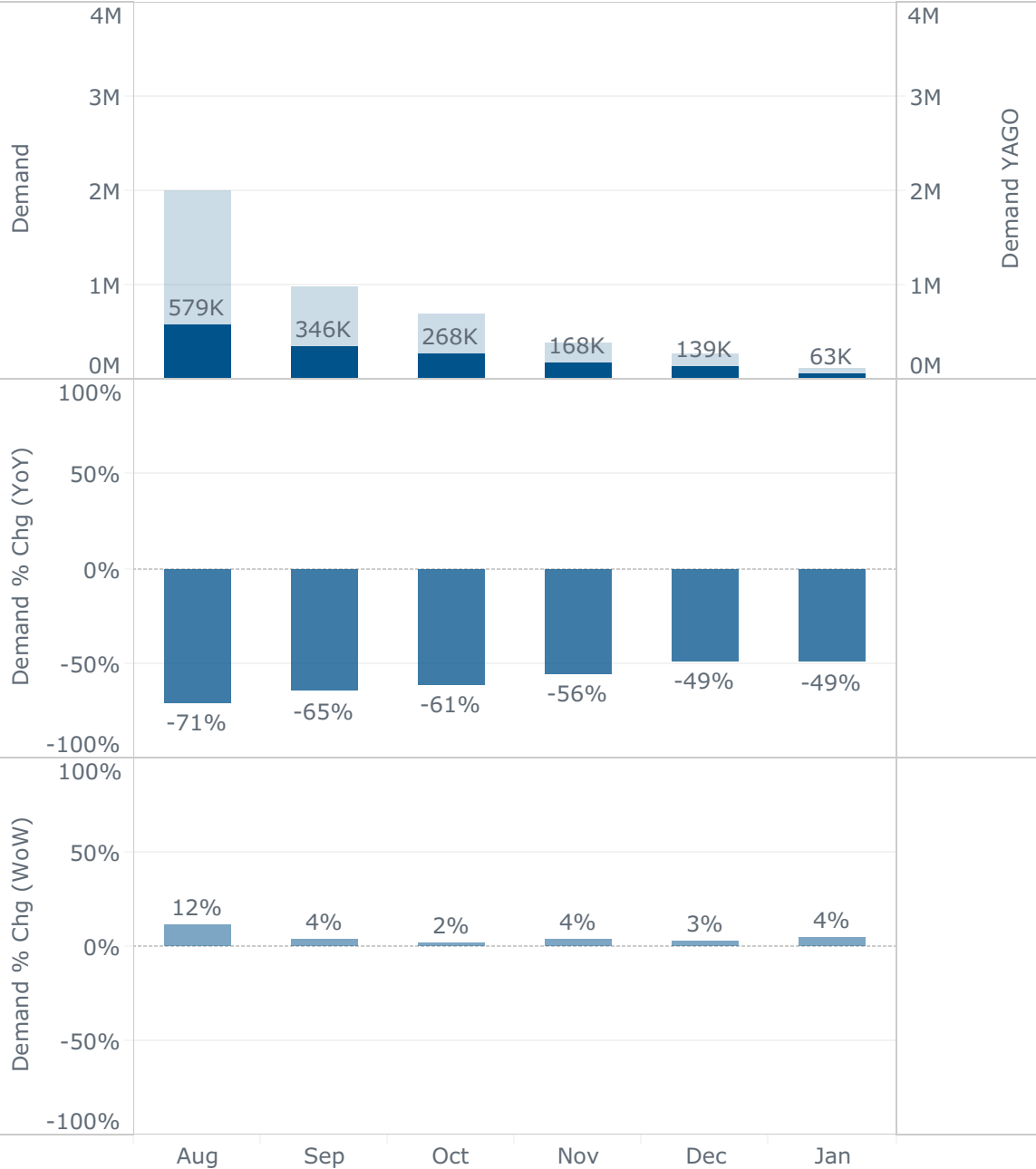
Source: STR



California Weekly Room Demand

- Demand can be used as an alternative metric for occupancy.
- As noted on the previous slide, there are limitations with the occupancy calculation providing comparable data over time as a result of the current COVID-19 pandemic.

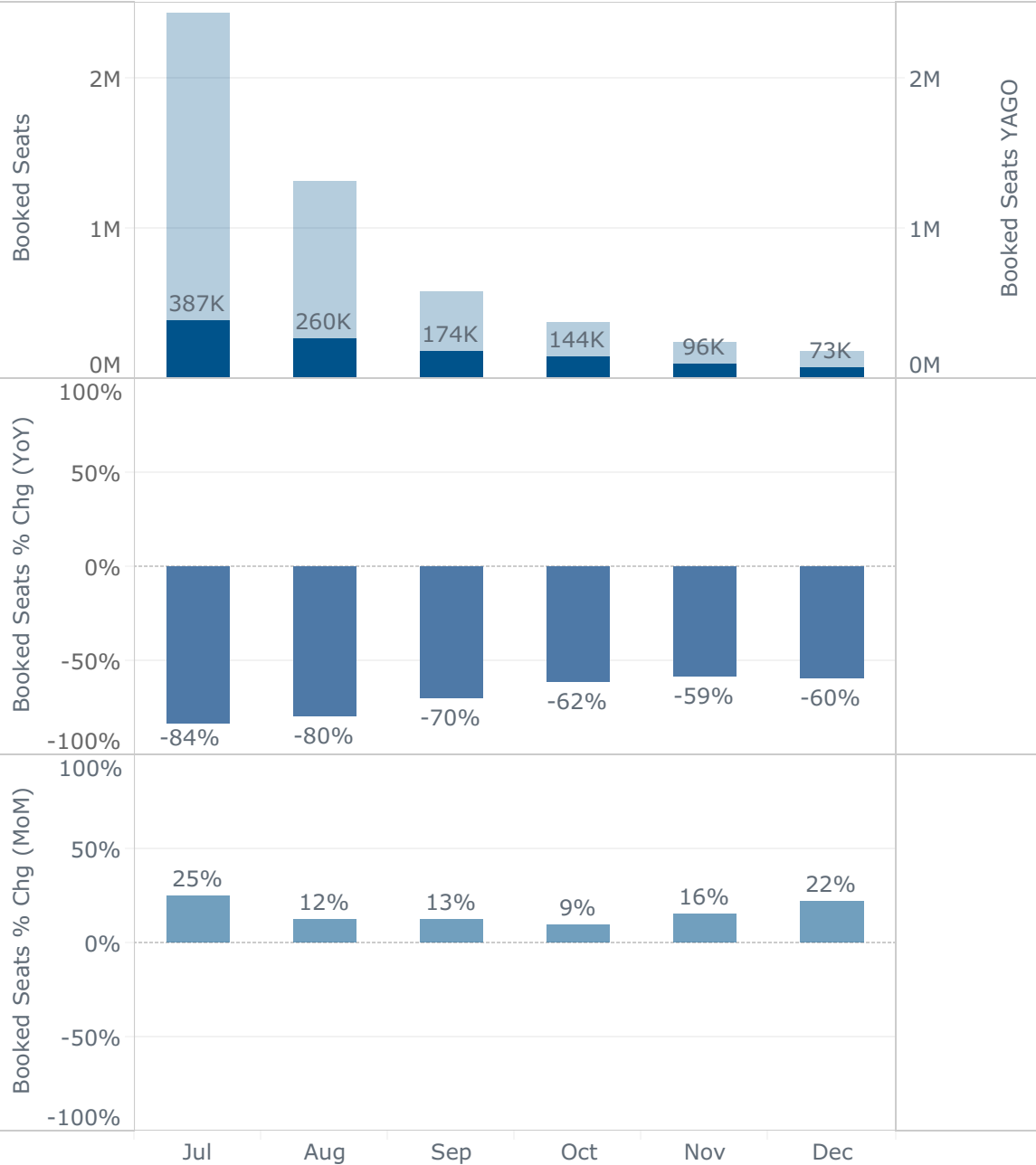
Source: STR



California Future Room Bookings (Weekly Reporting by Month)

- Future room night bookings for the next 6 months are shown on the left with demand from the same week in the previous year; percent change over the previous year is shown in the second chart.
- The third chart shows the week-over-week change in bookings, or **booking pace**.
- While hotel bookings can be changed or cancelled closer to the date of travel, the data provide directional insight into consumer sentiment around the timing of future travel.

Source: TravelClick



California Future Air Bookings (Monthly Reporting)

- Domestic air bookings to California for the next 6 months are shown on the left with demand from the same month in the previous year with percent change in the second chart.
- The third chart shows the month-over-month change in bookings, or booking pace.
- Similar to future hotel bookings, future air travel should be considered directional insight to the timing consumers are planning to travel in near future.

Source: ForwardKeys

Note: ForwardKeys data is reported on a monthly basis. Does not include bookings from Southwest Airlines.



Economic Indicators

- Tourism Spending
- Department of Labor Unemployment Figures

Weekly Travel Spending

U.S.

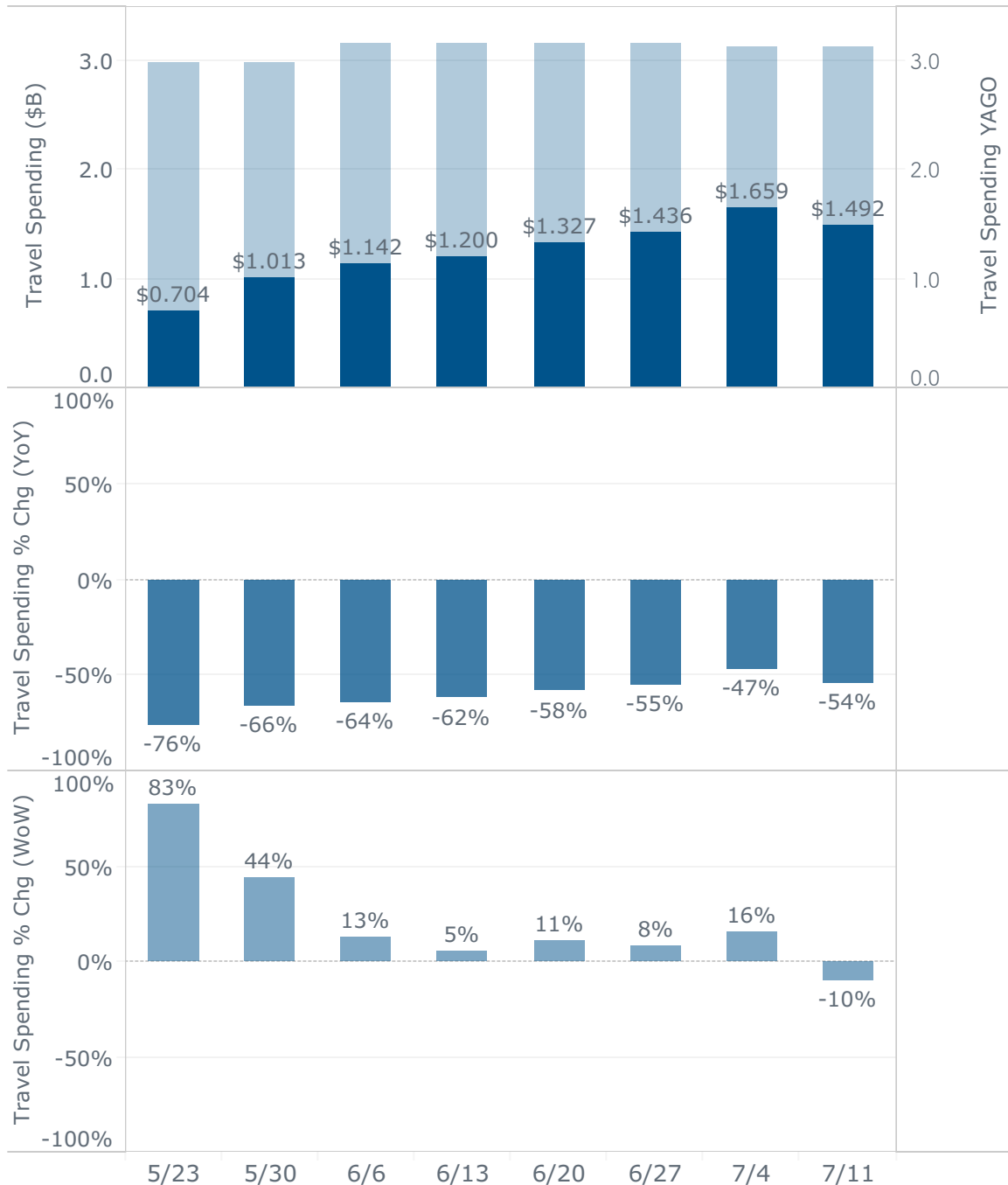
	<u>Week Ending 7/11</u>	<u>Net Chg (YoY)</u>	<u>% Chg (YoY)</u>	<u>% Chg (WoW)</u>
Travel Spending:	\$11.8B	-\$11.6B	-50%	-11%
Tax Revenue Lost:		<u>Net Chg (YoY)</u>		
Federal Tax:		-\$959M		
State Tax:		-\$350M		
Local Tax:		-\$236M		

California

	<u>Week Ending 7/11</u>	<u>Net Chg (YoY)</u>	<u>% Chg (YoY)</u>	<u>% Chg (WoW)</u>
Travel Spending:	\$1.5B	-\$1.6B	-54%	-10%
Tax Revenue Lost:		<u>Net Chg (YoY)</u>		
Federal Tax:		-\$131M		
State Tax:		-\$49M		
Local Tax:		-\$31M		

Source: Tourism Economics

Note: On June 24, Tourism Economics revised weekly spending figures for the past four weeks upward to better reflect increases in drive travel as economy reopened and travel resumed.

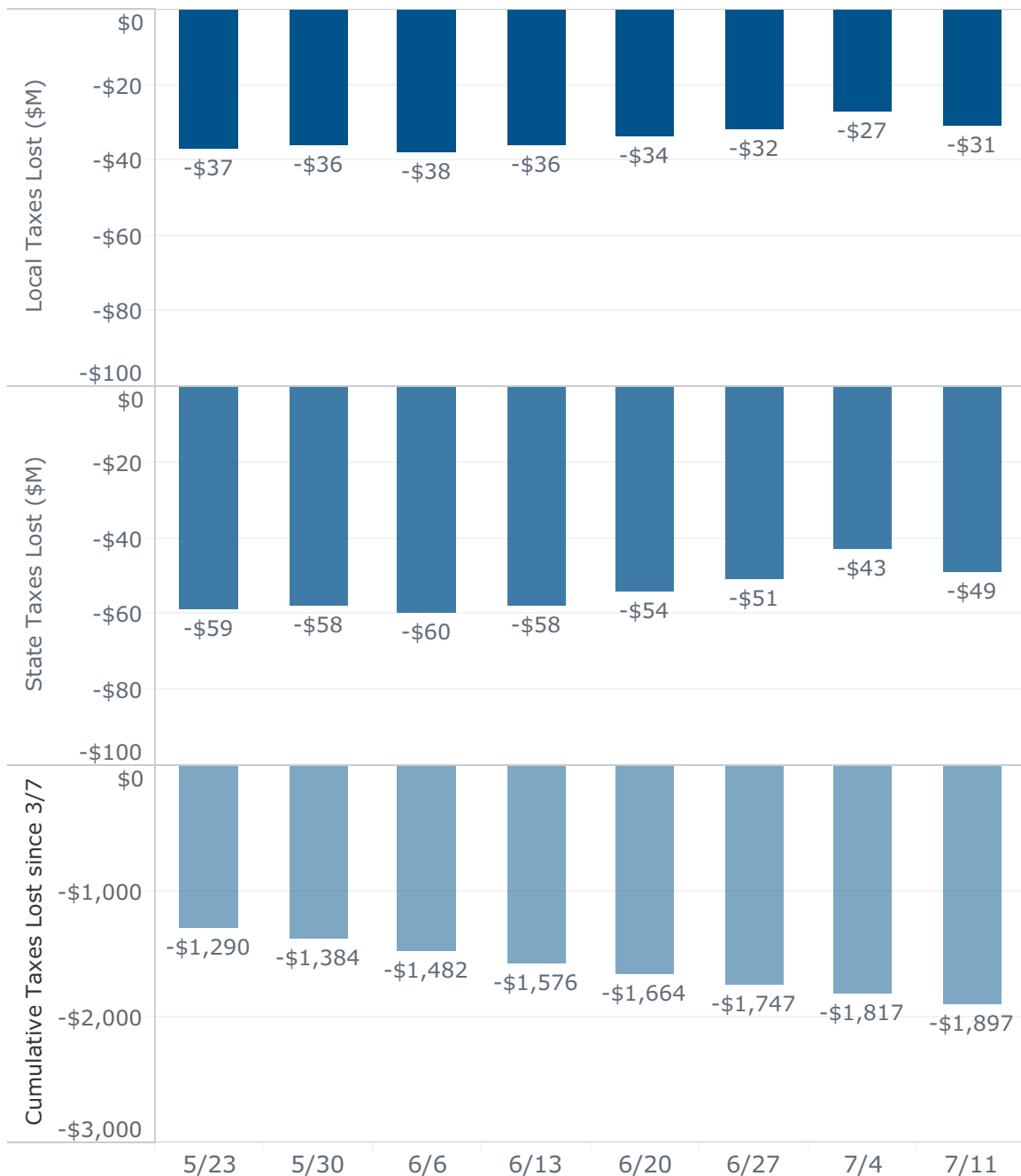


California Weekly Travel Spending

- The first charts shows the impact of coronavirus on weekly travel spending in California compared to travel spending for the same week in the previous year.
- The second and third charts show the year-over-year and week-over-week percent changes for spending.
- Monitor the week-over-week trend for increases as the economy begins to reopen and travel spending slowly resumes.

Source: Tourism Economics

Note: On June 24, Tourism Economics revised weekly spending figures for the past four weeks upward to better reflect increases in drive travel as economy reopened and travel resumed.



California Weekly State and Local Taxes Lost

- The first two charts show the impact of coronavirus on weekly tax revenue at the local and state level.
- The third chart shows the cumulative local and state tax revenue lost
- Monitor the week-over-week trend for increases as the economy begins to reopen and travel spending slowly resumes.

Source: Tourism Economics

Unemployment: Initial Insured Claims

U.S.

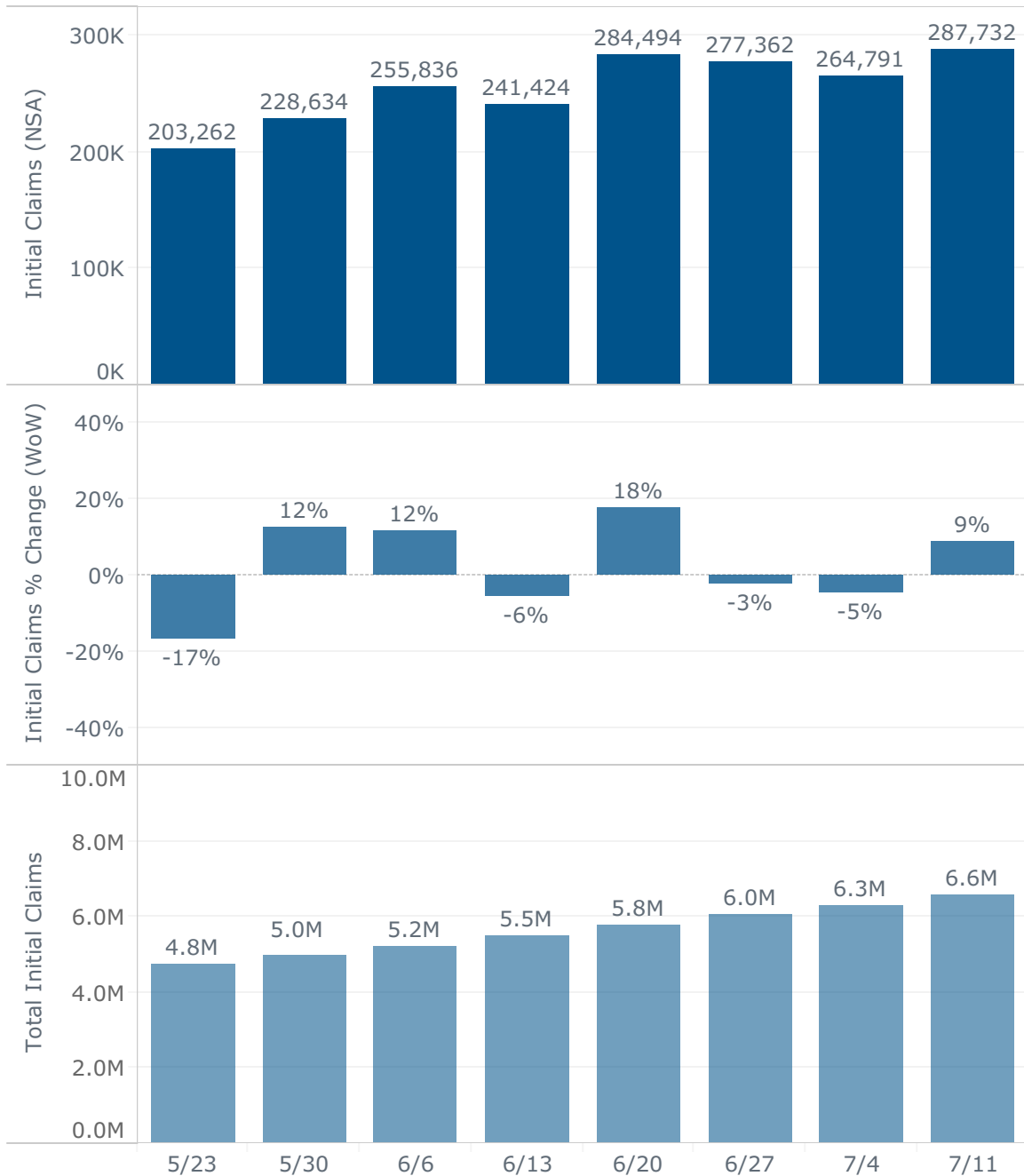
	Week Ending <u>7/11</u>	% Chg <u>(WoW)</u>
Weekly New Claims	1.5M	+8%
Total Unemployment	17M	
Unemployment Rate	12%	

California

	Week Ending <u>7/11</u>	% Chg <u>(WoW)</u>
Weekly New Claims:	288K	+9%
Total Unemployment	2.9M	
Unemployment Rate	17%	

Source: Department of Labor

*Total Unemployment and Unemployment Rate reflect two week average



California Unemployment

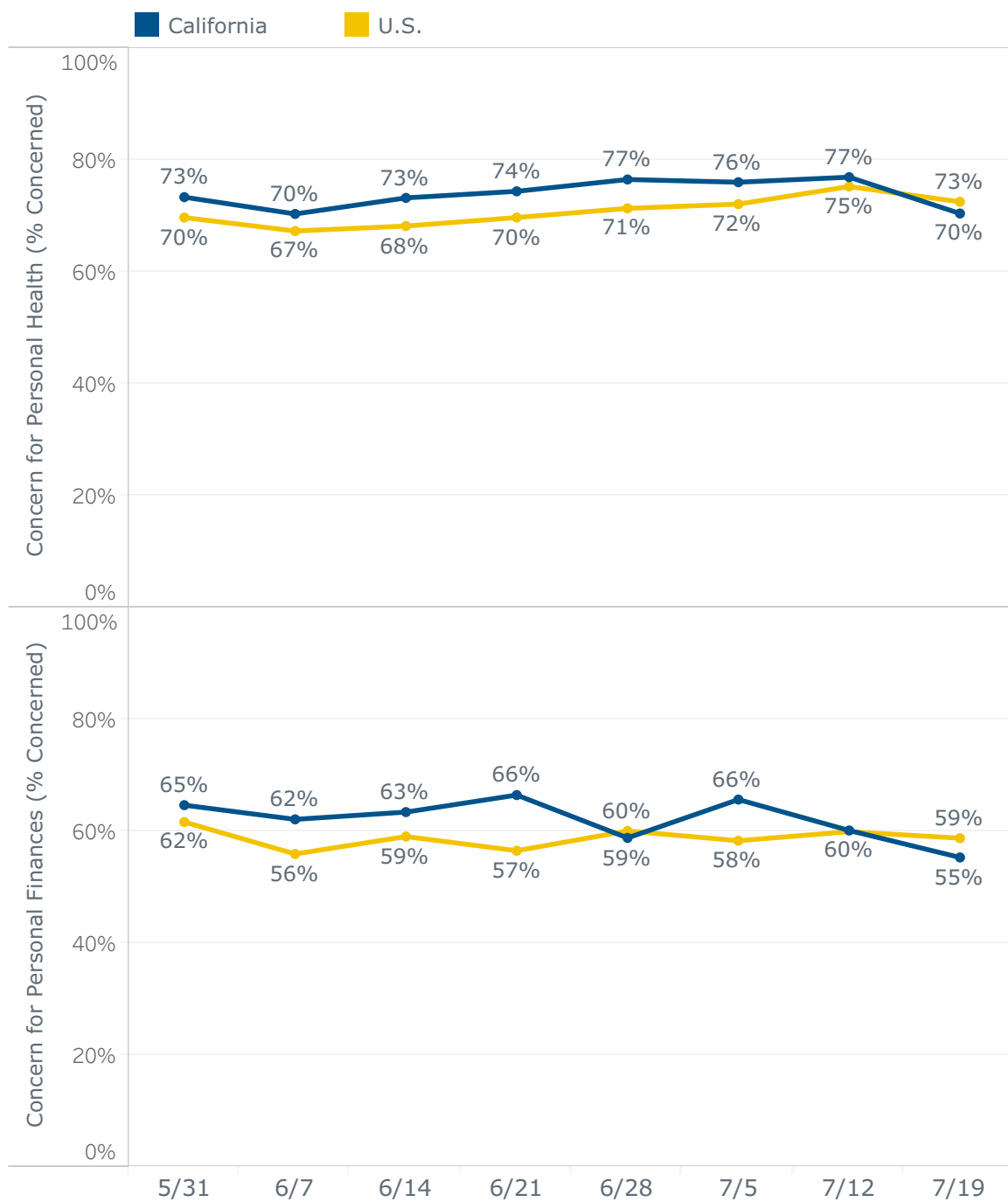
- The first chart shows weekly insured unemployment initial claims and the week-over-week percent change.
- The second chart shows the percent change in claims week-over-week.
- The third chart shows cumulative claims since the beginning of March.

Source: Department of Labor



Consumer Sentiment Appendix

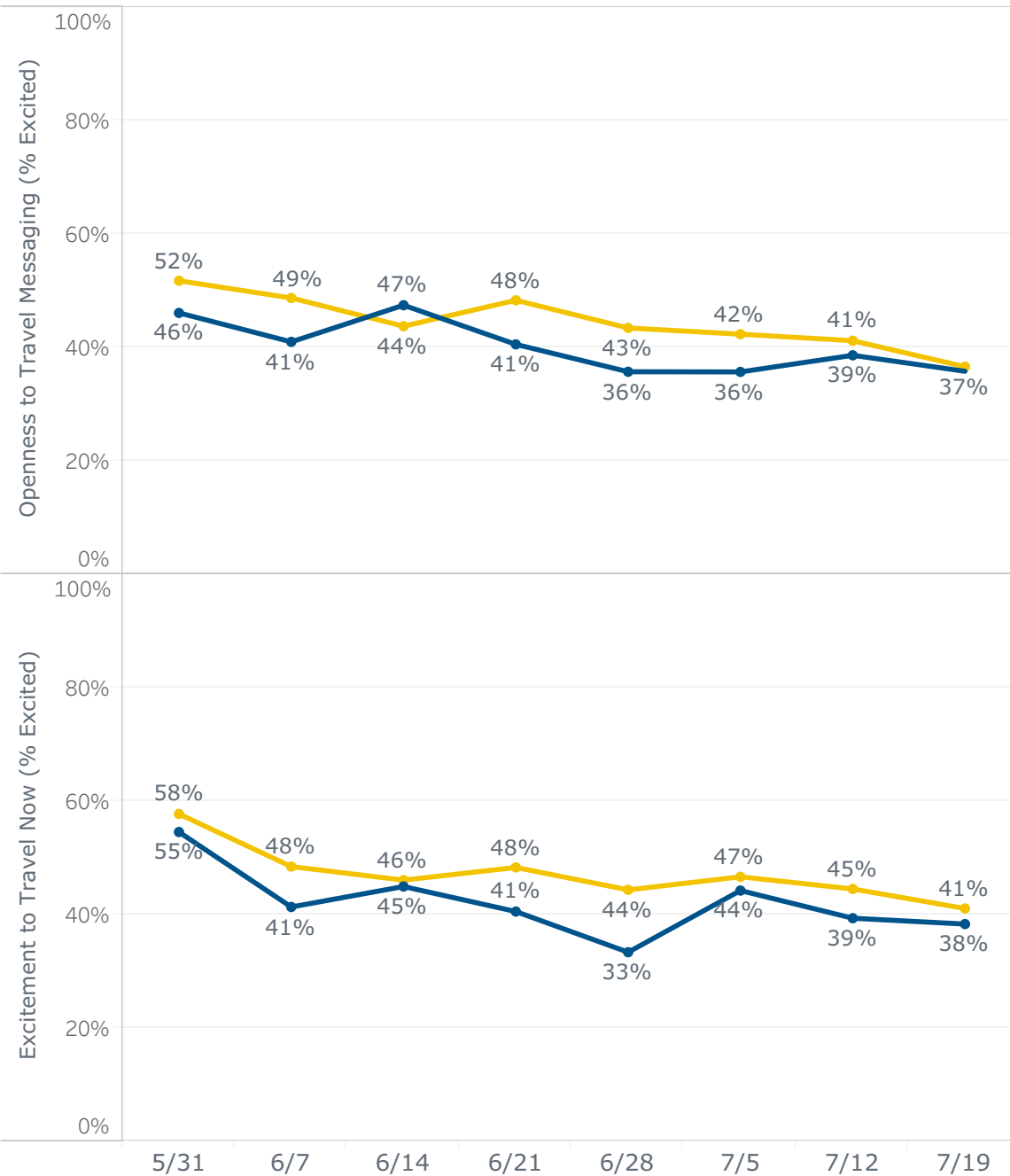
- Destination Analysts Consumer Sentiment



Concern for Personal Health and Finances

Source: Destination Analysts

California U.S.



Openness to Travel & Excitement to Travel Detail

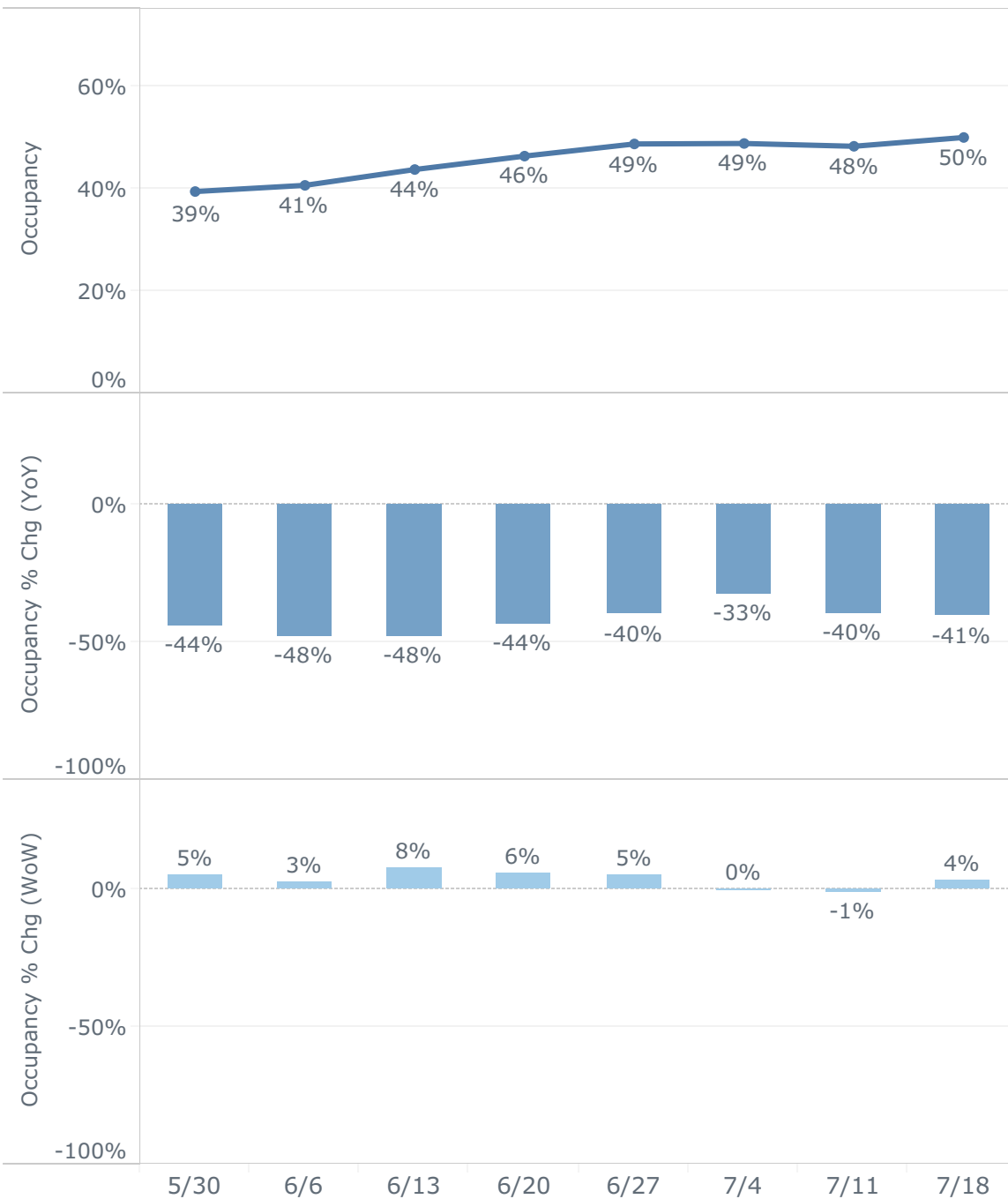
Source: Destination Analysts



Lodging Indicators Appendix

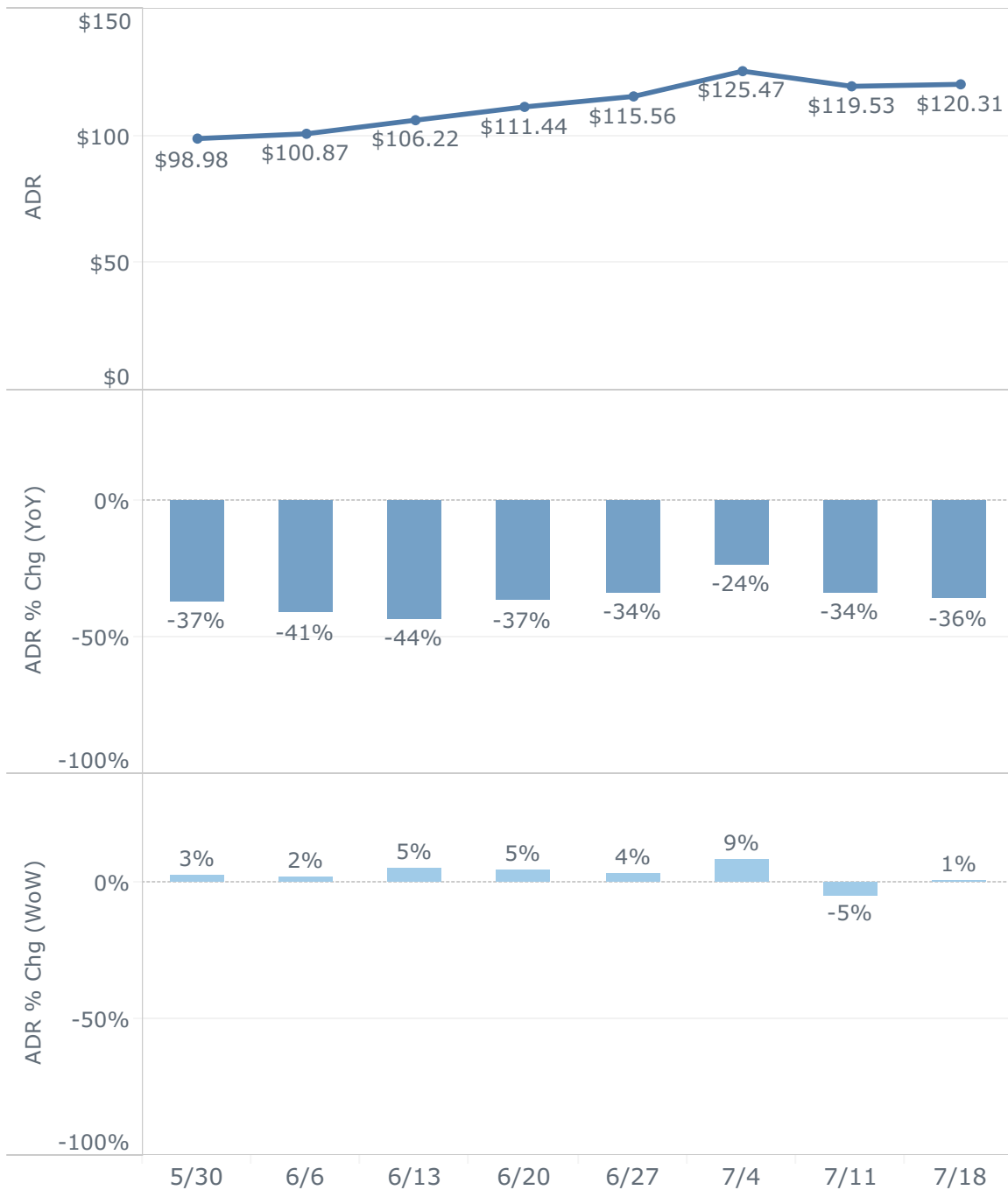
- California Occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPar) Details
- Lodging Metrics by California Regions
- HomeShare Metrics (Monthly)

California Weekly Lodging Metrics: Occupancy



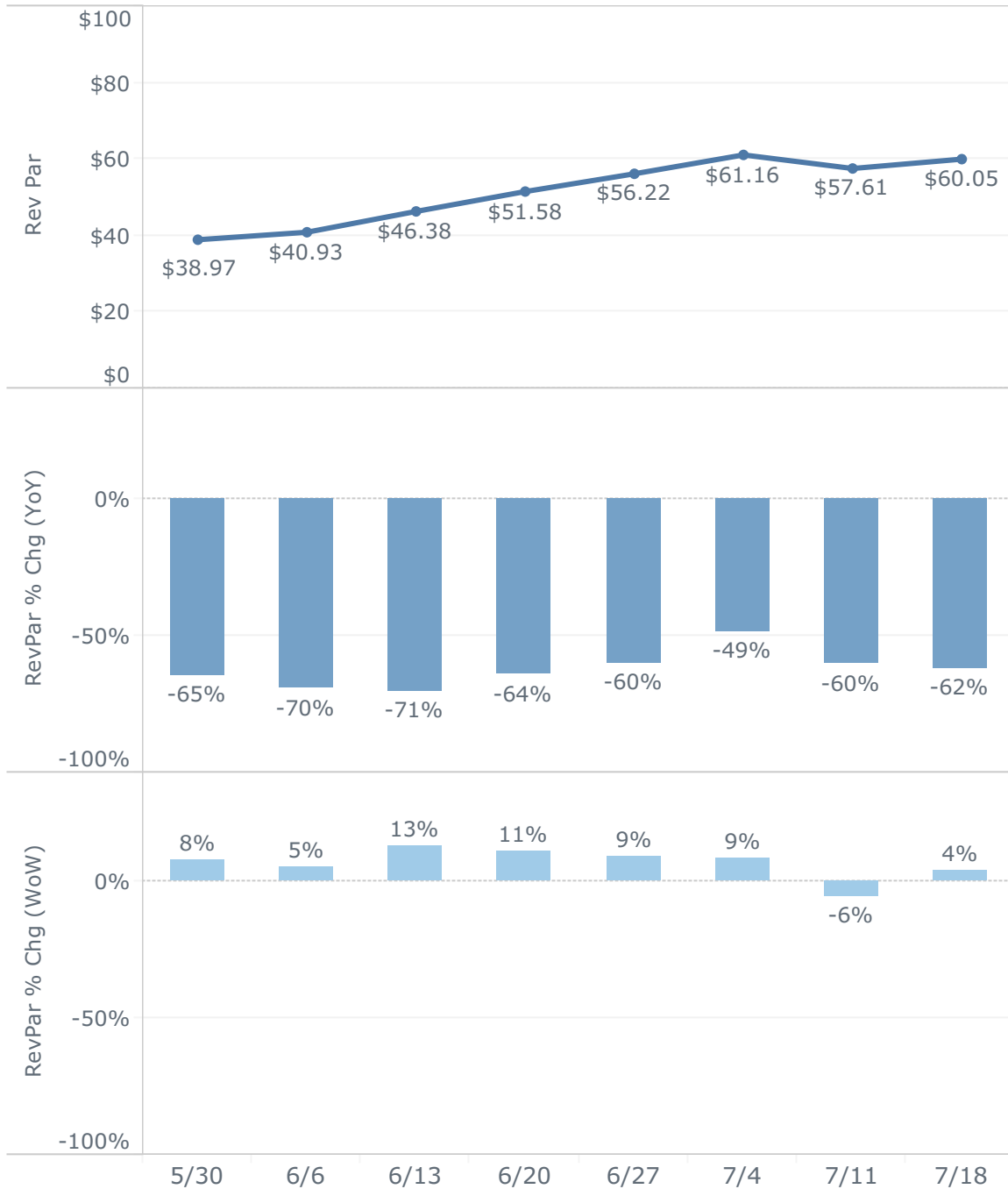
Source: STR

California Weekly Lodging Metrics: ADR



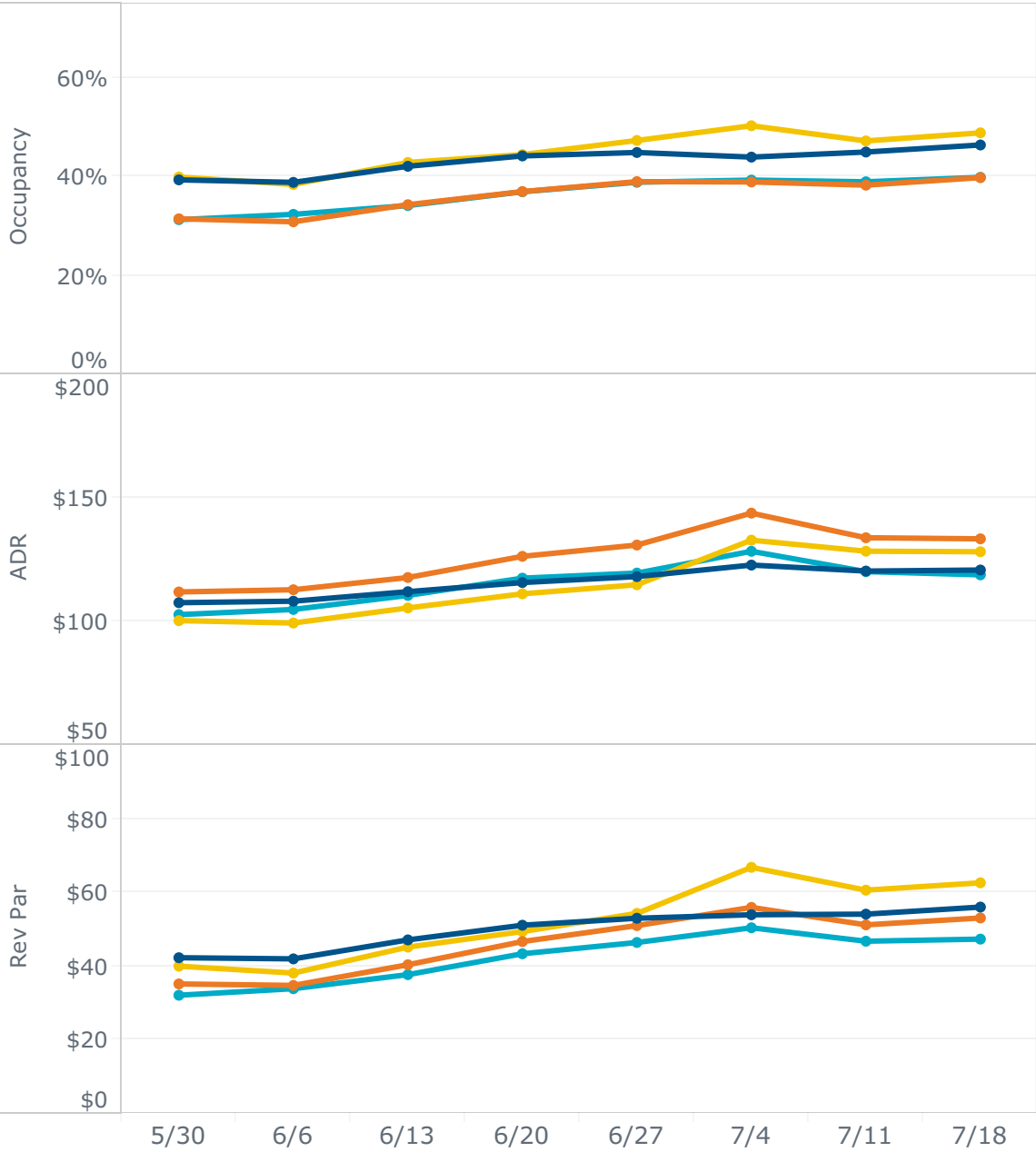
Source: STR

California Weekly Lodging Metrics: RevPar



Source: STR

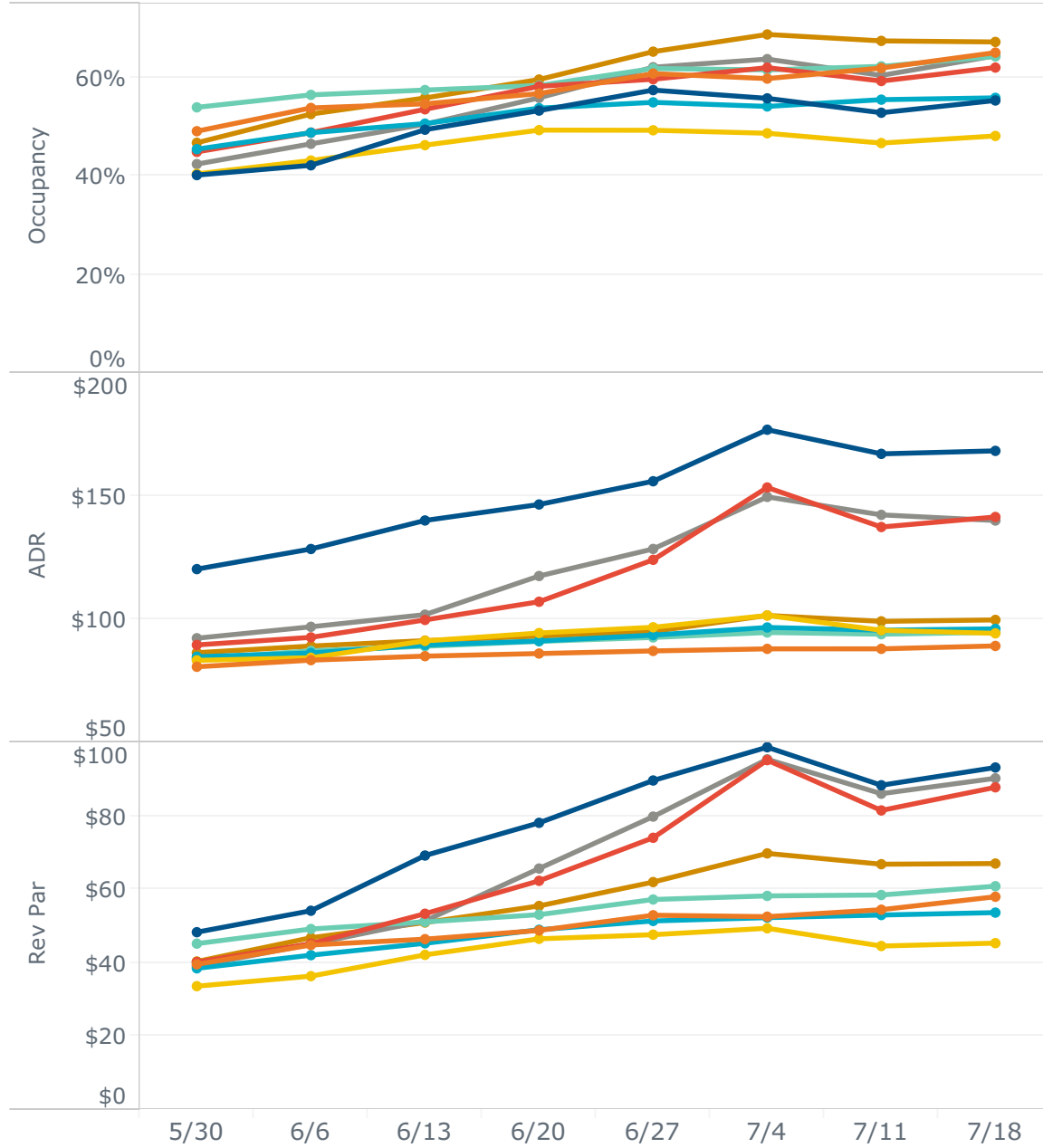
Los Angeles Orange Co. San Diego San Francisco



California Weekly Lodging Metrics: Gateway Regions

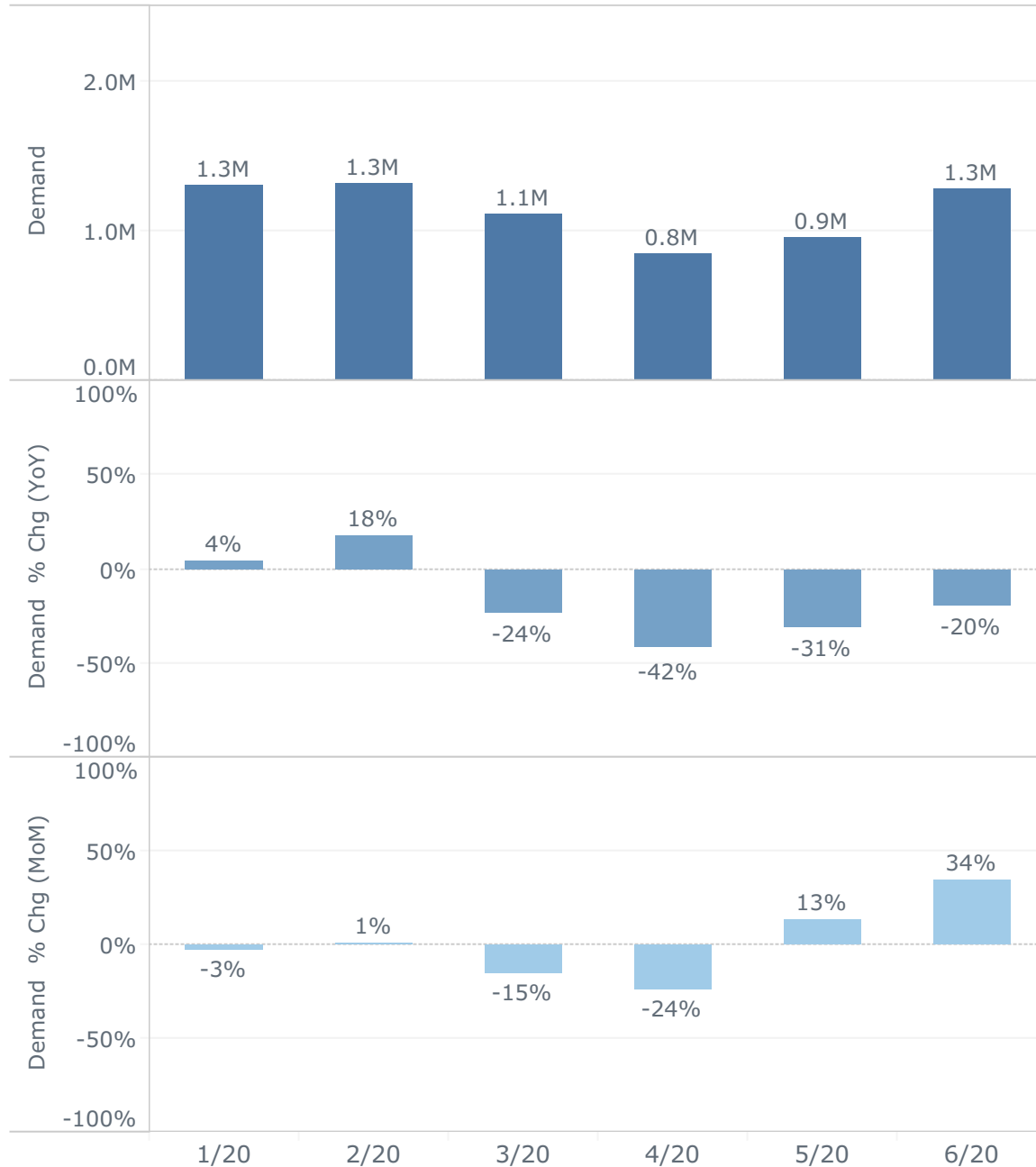
Source: STR

Central Coast Deserts High Sierra North Coast
Central Valley Gold Country Inland Empire Shasta Cascade



California Weekly Lodging Metrics: Rural Regions

Source: STR



California Monthly Lodging Metrics: HomeShare Demand (Total Units)

- Note that AirDNA restated Demand for the past 6 months as of the June 2020 report.

Source: AirDNA