COVID-19 Research Dashboard
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:

<table>
<thead>
<tr>
<th>Visit California</th>
<th>Third-Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>STR</td>
<td>COVID Tracking Project</td>
</tr>
<tr>
<td>AirDNA</td>
<td>COVID Act Now</td>
</tr>
<tr>
<td>TravelClick</td>
<td>California Dept of Public Health</td>
</tr>
<tr>
<td>ForwardKeys</td>
<td>Department of Labor</td>
</tr>
<tr>
<td>Destination Analysts</td>
<td>Google</td>
</tr>
<tr>
<td>SMARInsights</td>
<td>Los Angeles Times</td>
</tr>
<tr>
<td>Tourism Economics</td>
<td>New York Times</td>
</tr>
</tbody>
</table>

- 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

<table>
<thead>
<tr>
<th>Public Health Indicators</th>
<th>Lodging/Airline Indicators</th>
<th>Economic Indicators</th>
</tr>
</thead>
</table>
| - Nationwide, the rate of new cases appears to have started falling.  
- After flattening rates in California, we anticipate new cases here will also start to fall, but a data error was reported during the past week which means the current rate may be inaccurate.  
- Even as new cases slow, deaths continue to trend up for both the U.S. and California (death counts were not impacted by the data issue) | - Statewide room demand is down 41% versus the same time a year ago. Demand rose 4% compared to a week ago.  
- ADR and Rev Par both had slight gains week over week.  
- Bookings for August ticked up 30% for the week ending July 26.  
- Lodging improvements continue to be driven by drive market activity, as airline travel remains depressed. | - Weekly travel spending lags our other indicators by one week.  
- For the week ending July 25, both national and California travel spending were relatively unchanged to the week before.  
- New unemployment claims slowed for the week ending July 25 but unemployment remains at 11% nationwide, and at 17% for California. |

**Consumer Sentiment Indicators**

- Nationally, mindset towards resuming activities as well as readiness to travel remain low, with a little more than half of respondents stating they are either venturing out or resuming normal activities, and a little less than half saying that they are ready to resume travel or have already started traveling.
Executive Summary (continued)

Current Status: Recovery Phase

California Consumer Sentiment Snapshot

- Californians' outlook continues to trail National sentiment, with 55% continuing to classify themselves as Risk Adverse towards resuming activities, and 58% saying they need more time before they would be ready to travel.
# Crisis Stage:

- **Response**
- **Recovery**
  - Hyper-Local
  - In-State
  - Regional
  - National
  - International
  - Post-Containment

## Characteristics:
- Travel is counter-indicated due to infection rate and 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.

## Key Indicator Matrix

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<tbody>
<tr>
<td><strong>Public Health Indicators</strong></td>
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<td>• Case counts</td>
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<td>• Shelter in place restrictions</td>
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<tr>
<td><strong>Consumer Sentiment Indicators</strong></td>
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<td>• Mindset (SMARInsights)</td>
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<td>• Healthy Travel Index (Destination Analysts)</td>
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<tr>
<td><strong>Lodging &amp; Airline Indicators</strong></td>
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<tr>
<td>• Domestic Air Bookings (leading)</td>
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<tr>
<td>• Hotel Bookings (leading)</td>
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<tr>
<td><strong>Economic Indicators</strong></td>
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</tr>
<tr>
<td>• Travel Spending</td>
<td></td>
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</tr>
<tr>
<td>• Unemployment</td>
<td></td>
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</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>California*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Week Ending 8/2</td>
<td>Week Ending 8/2</td>
</tr>
<tr>
<td>Net New Cases:</td>
<td>424,511</td>
<td>55,503</td>
</tr>
<tr>
<td>% Chg (WoW)</td>
<td>-9%</td>
<td>-20%</td>
</tr>
<tr>
<td>Net Deaths:</td>
<td>7,884</td>
<td>940</td>
</tr>
<tr>
<td>% Chg (WoW)</td>
<td>+25%</td>
<td>+29%</td>
</tr>
<tr>
<td>Cumulative Cases:</td>
<td>4,644,565</td>
<td>509,162</td>
</tr>
<tr>
<td>% Chg (WoW)</td>
<td>+10%</td>
<td>+12%</td>
</tr>
<tr>
<td>Cumulative Deaths:</td>
<td>147,134</td>
<td>9,356</td>
</tr>
<tr>
<td>% Chg (WoW)</td>
<td>+6%</td>
<td>+11%</td>
</tr>
<tr>
<td>Positive Test Rate:</td>
<td>8.0</td>
<td>6.4</td>
</tr>
<tr>
<td>% Chg (WoW)</td>
<td>-2%</td>
<td>-18%</td>
</tr>
</tbody>
</table>

* New Cases and Positive Test rate for the week ending 8/2 may be impacted by a data error that is being investigated. Until resolved, interpret with caution, as both measures may be higher than reported here.

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

* New cases for the week ending Aug. 2 may be impacted by a data error that is being investigated. Until resolved, interpret with caution, as cases may be higher than reported here.
California Net New COVID-19 Cases* by County in Past 14 Days

- The map shows net news 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

* New cases for the week ending Aug. 2 may be impacted by a data error that is being investigated. Until resolved, interpret with caution, as cases may be higher than reported here.
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

* New cases for the week ending Aug. 2 may be impacted by a data error that is being investigated. Until resolved, interpret with caution, as cases may be higher than reported here.
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.)

* New cases for the week ending Aug. 2 may be impacted by a data error that is being investigated. Until resolved, interpret with caution, as cases may be higher than reported here.
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

Source: The New York Times
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)
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 Toward Activities

<table>
<thead>
<tr>
<th>Risk Averse</th>
<th>Cautious Leaving Home</th>
<th>Back to Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>U.S.</td>
<td></td>
</tr>
<tr>
<td>55%</td>
<td>46%</td>
<td>46%</td>
</tr>
</tbody>
</table>

### Mindset Toward Travel

<table>
<thead>
<tr>
<th>I need a lot more time to be ready to travel</th>
<th>I need a little more time to be ready to travel</th>
<th>I'm ready to travel, but feel some hesitation</th>
<th>I'm ready to travel, with no hesitations</th>
<th>I'm already traveling</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>U.S.</td>
<td>California</td>
<td>U.S.</td>
<td>California</td>
</tr>
<tr>
<td>34%</td>
<td>30%</td>
<td>24%</td>
<td>24%</td>
<td>22%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ready to Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
</tr>
<tr>
<td>42%</td>
</tr>
</tbody>
</table>
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
• 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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Past Week</th>
<th>Future Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit a theme or amusement park</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Visit a zoo or other outdoor attraction</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Visit a museum, gallery, or other indoor attraction</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Visit a spa</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Visit a casino</td>
<td>16%</td>
<td></td>
</tr>
</tbody>
</table>

### Meetings / Events

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Past Week</th>
<th>Future Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend an in-person conference or meeting</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Attend an outdoor venue for a sporting, music, or festival</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Attend a sporting, music, or other event at an indoor venue</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

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
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
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.

<table>
<thead>
<tr>
<th>Week Ending 7/25</th>
<th>Net Chg (YoY)</th>
<th>% Chg (YoY)</th>
<th>% Chg (WoW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Spending:</td>
<td>$11.6B</td>
<td>-$12B</td>
<td>-51%</td>
</tr>
<tr>
<td>Tax Revenue Lost:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Tax:</td>
<td>-$946M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Tax:</td>
<td>-$345M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Tax:</td>
<td>-$235M</td>
<td></td>
<td></td>
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</tbody>
</table>

## California

<table>
<thead>
<tr>
<th>Week Ending 7/25</th>
<th>Net Chg (YoY)</th>
<th>% Chg (YoY)</th>
<th>% Chg (WoW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Spending:</td>
<td>$1.5B</td>
<td>-$1.7B</td>
<td>-54%</td>
</tr>
<tr>
<td>Tax Revenue Lost:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Tax:</td>
<td>-$130M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Tax:</td>
<td>-$49M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Tax:</td>
<td>-$31M</td>
<td></td>
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</tr>
</tbody>
</table>

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.
The first chart 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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Week Ending 7/25</th>
<th>% Chg (WoW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly New Claims</td>
<td>1.2M</td>
<td>-12%</td>
</tr>
<tr>
<td>Total Unemployment</td>
<td>17M</td>
<td></td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

## California

<table>
<thead>
<tr>
<th>Category</th>
<th>Week Ending 7/25</th>
<th>% Chg (WoW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly New Claims:</td>
<td>249K</td>
<td>-14%</td>
</tr>
<tr>
<td>Total Unemployment</td>
<td>2.9M</td>
<td></td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

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
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
California Weekly Lodging Metrics: Gateway 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
U.S. and California Monthly HomeShare Metrics (Total Units)

Source: AirDNA
California Monthly HomeShare Metrics: Gateway Regions

Source: AirDNA
California Monthly HomeShare
Metrics: Rural Regions

Source: AirDNA