UberMedia
Tourism and Recovery

This Week

In social distancing..

What is happening in tourist destinations like Portland, Charlotte, and Boston, and how different or similar it is across the country?

1. What policies do cities currently have in place regarding tourism, reopening, and recovery?
2. How has foot traffic trends changed on the national level?
3. What tourism trends are emerging as cities begin to reopen?
4. How can DMOs support recovery strategies in their respective cities?

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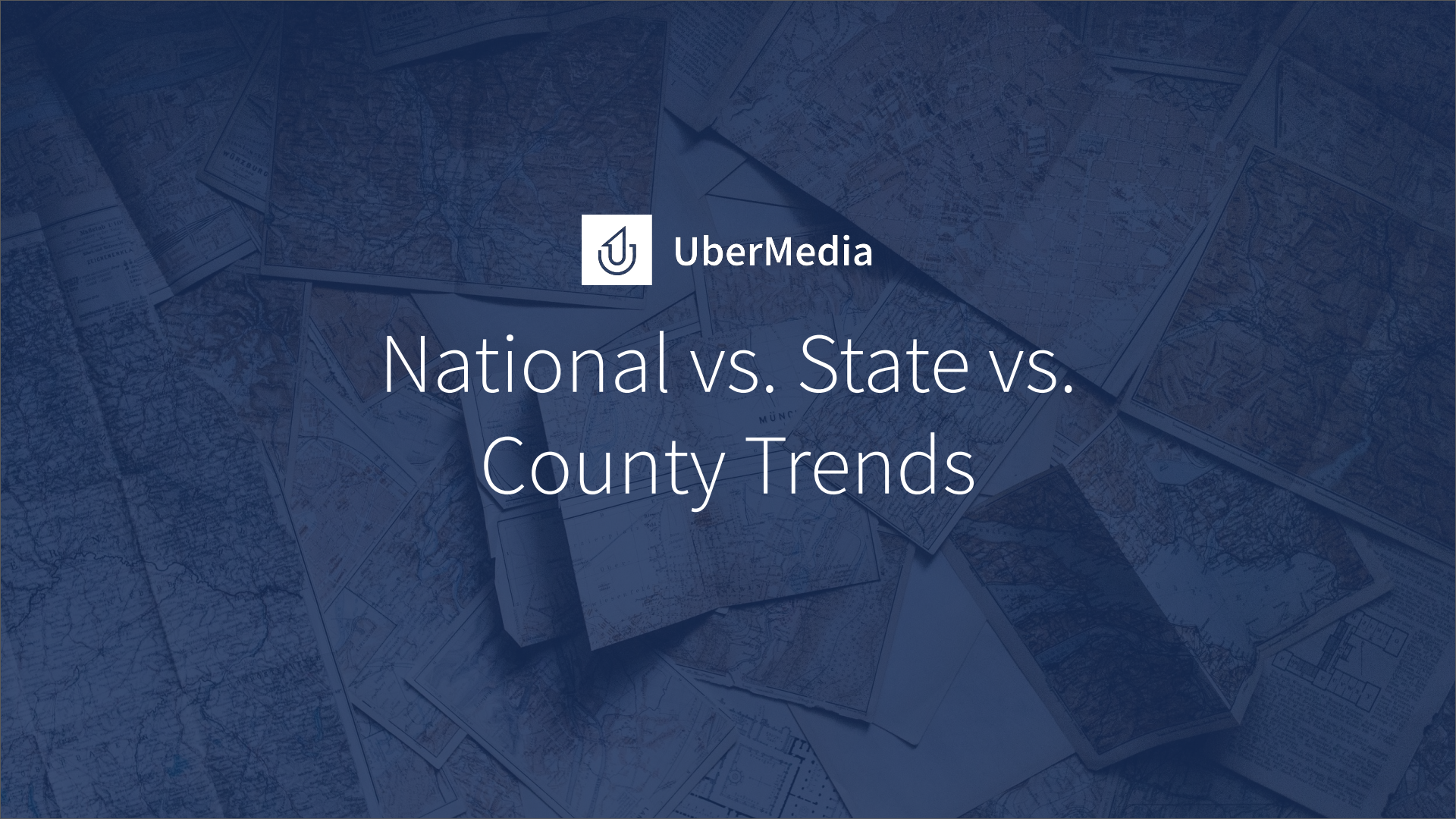
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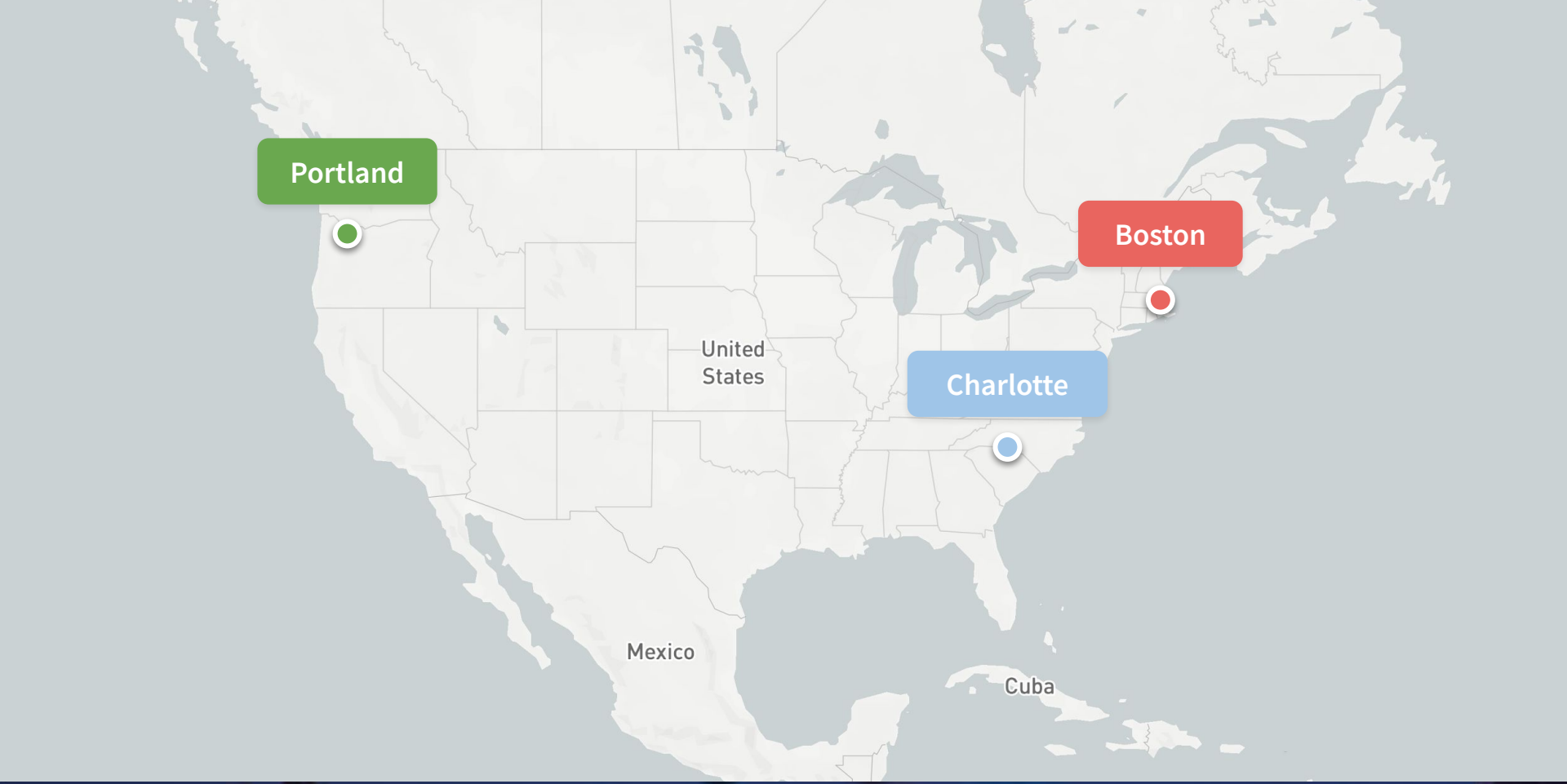
National vs. State vs.
County Trends



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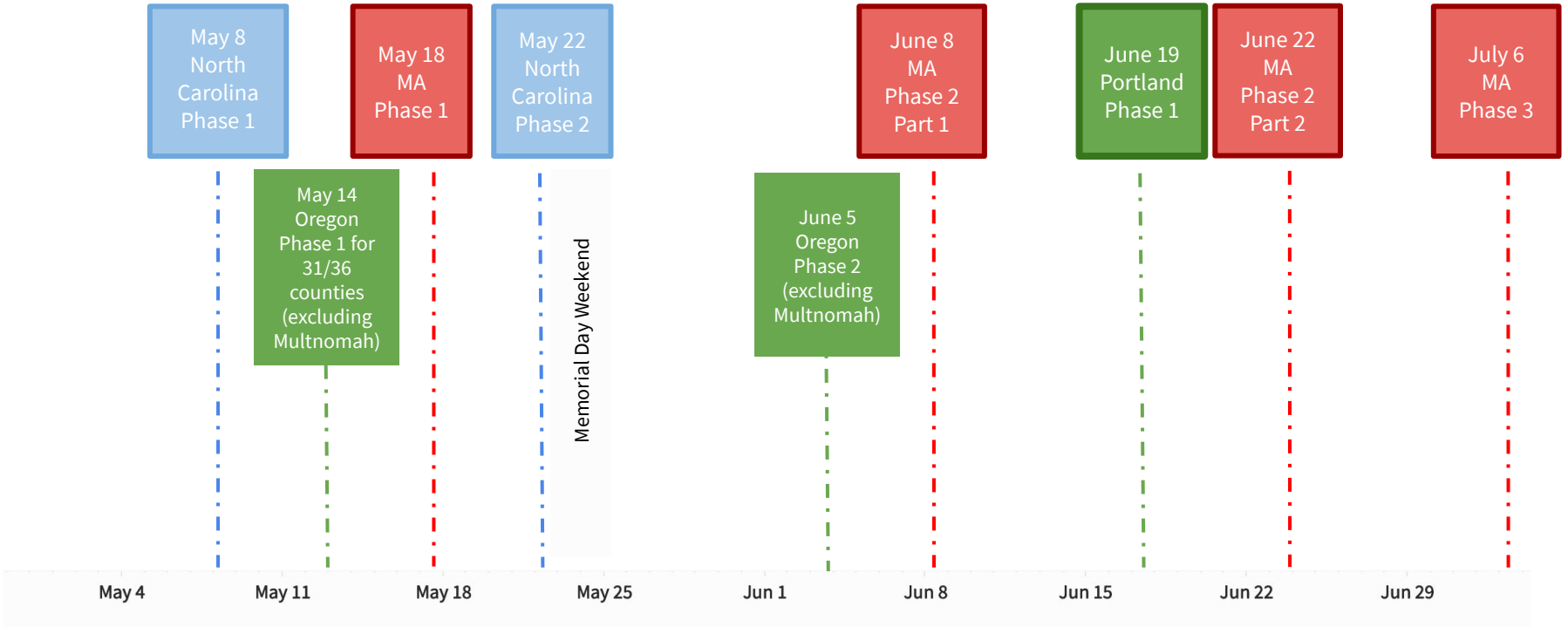
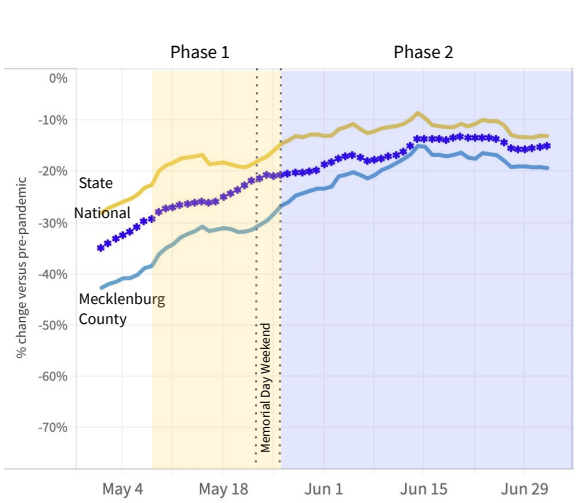
Three Destinations, three different timelines

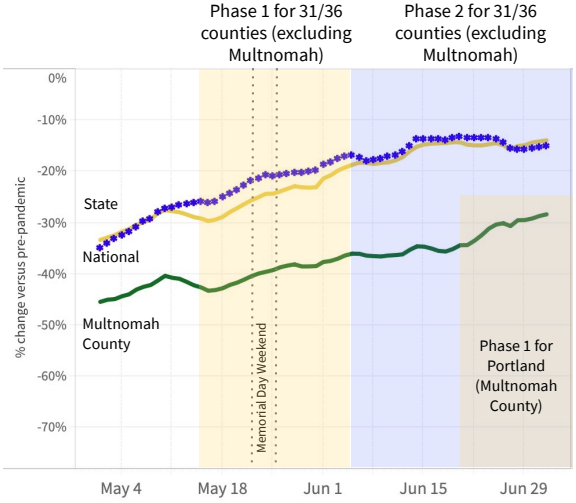


Contrasting consumer re-engagement

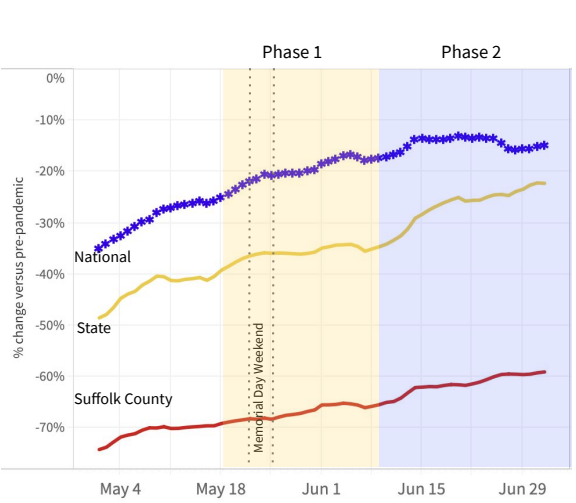
Comparison of National consumer trends to States and their Destinations, index to “pre-pandemic” (Jan. 1 - Feb. 15, 2020)
Devices activity to all the malls, shopping centers, and strip malls in the State



North Carolina / Charlotte



Oregon / Portland



Massachusetts / Boston

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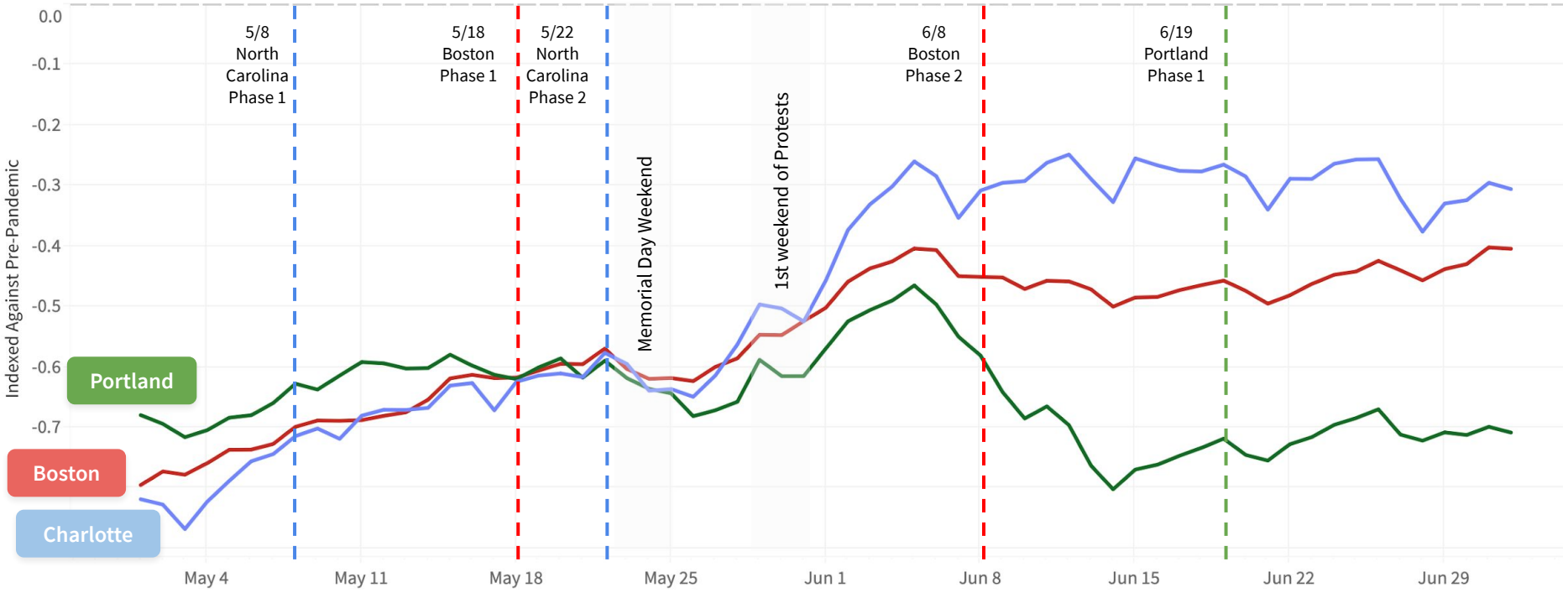
Close Contacts: Charlotte and Boston show consistent weekend trends



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The Evolving Tourism Landscape

Tourism Landscape by the Numbers

Airport Activity in May 2020

- Charlotte (CLT) = -77.4% YoY
- Boston (BOS) = -94.8% YoY
- Portland (PDX) = -90.9% YoY

Hotel Occupancy in May 2020

- Charlotte (Mecklenburg County) = -87.8% YoY
- Boston and Cambridge = -93.7% YoY
- Greater Portland Market = -77.3% YoY

Segmenting Visitors with Mobile Location Data

Visitor Segments are created based on algorithmically derived Common Evening Location (CEL).

Visitor Segment	Definition
Locals	CEL within 50 miles
In-State	CEL is in state, excluding Locals
Out-of-State	CEL is out of state, excluding Workers
International	CEL is out of USA

Out of State Visitor Proportion Decrease

Time period = Phase 1 (per state) to present, Compared to same time period in 2019

Charlotte

-6.6%

2019 *n* = 1,090,513
2020 *n* = 675,370
TF: May 8 to June 24, 19/20

Portland

-5.2%

2019 *n* = 310,938
2020 *n* = 208,145
TF: June 19 to July 5, 19/20

Boston

-19.1%

2019 *n* = 1,538,704
2020 *n* = 640,056
TF: May 18 to June 24, 19/20

Fewer Visitors + Changes in Out-of-State Markets

Charlotte

State	2019 Ranking	2020 Ranking	Diff
SC	1	1	**-2.45%**
FL	2	2	**0.87%**
GA	3	3	**1.38%**
OH	6	4	**2.76%**
VA	4	5	**-0.43%**

Comparing same time period in 2019 and 2020: 5/8 to 6/24

Portland

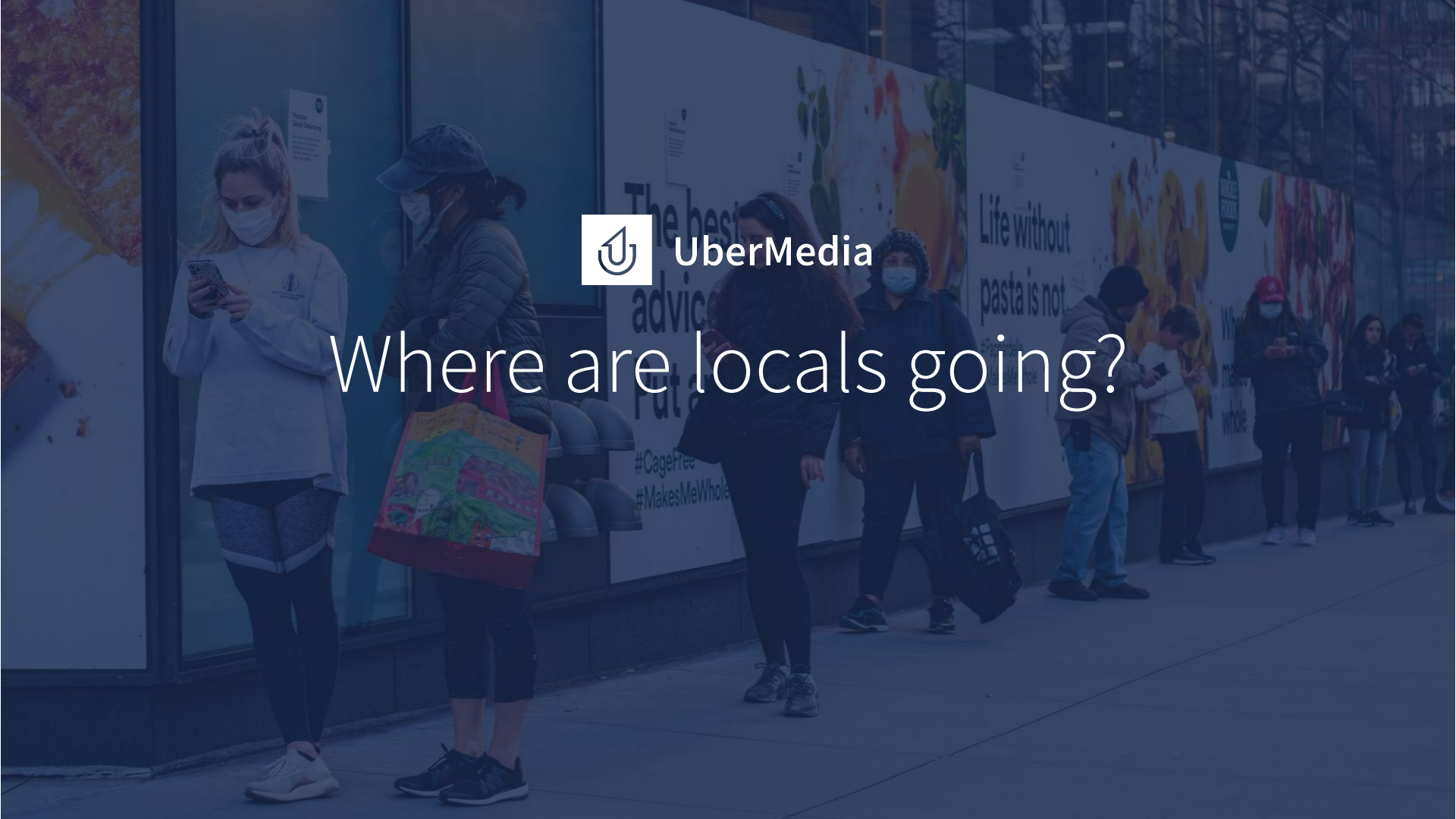
State	2019 Ranking	2020 Ranking	Diff
WA	1	1	**21.33%**
CA	2	2	**-5.6%**
TX	3	3	**-1.6%**
AZ	4	4	**-0.3%**
FL	5	5	**-1.2%**

Comparing same time period in 2019 and 2020: 6/19 to 7/5

Boston

State	2019 Ranking	2020 Ranking	Diff
NH	2	1	**7.53%**
RI	4	2	**8.19%**
CT	3	3	**1.88%**
NY	1	4	**-3.20%**
FL	5	5	**0.36%**

Comparing same time period in 2019 and 2020: 5/18 to 6/24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Where are locals going?

Locals Visitor Proportion Increases

Time period = Phase 1 (per state) to present, Compared to same time period in 2019

Charlotte

+11%

2019 *n* = 1,090,513
2020 *n* = 675,370
TF: May 8 to June 24, 19/20

Portland

+10.9%

2019 *n* = 310,938
2020 *n* = 208,145
TF: June 19 to July 5, 19/20

Boston

+21%

2019 *n* = 1,538,704
2020 *n* = 640,056
TF: May 18 to June 24, 19/20

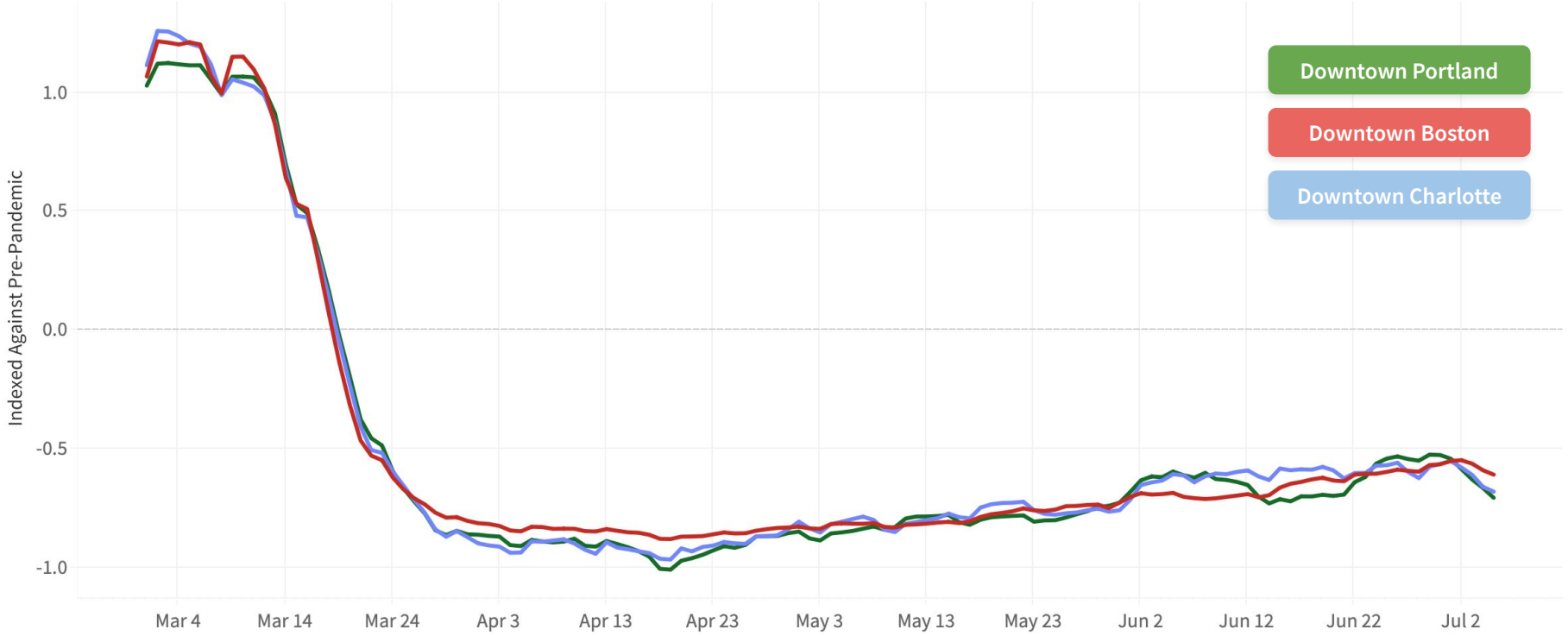
Understanding the Movement of Locals

Methodology

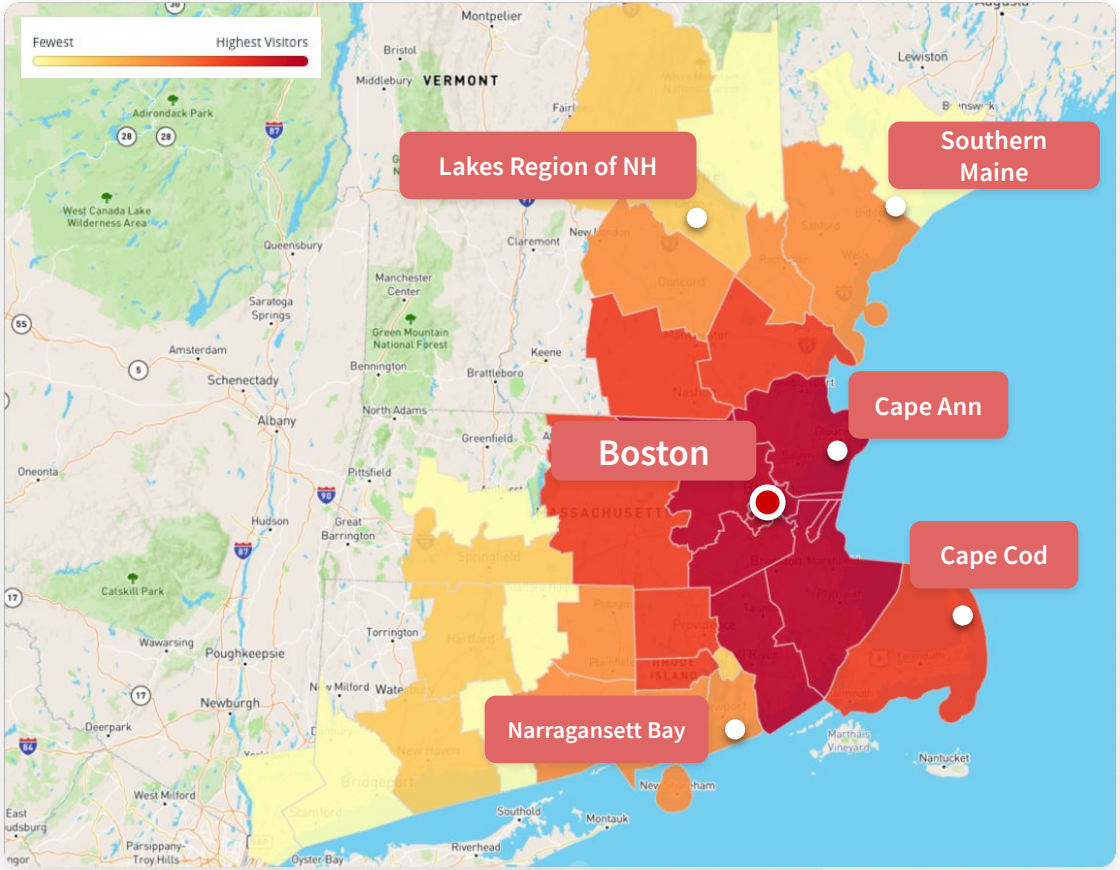
Select locals segment

Analyze if they were seen in any other counties in the surrounding area

Locals: Low Activity in Downtowns

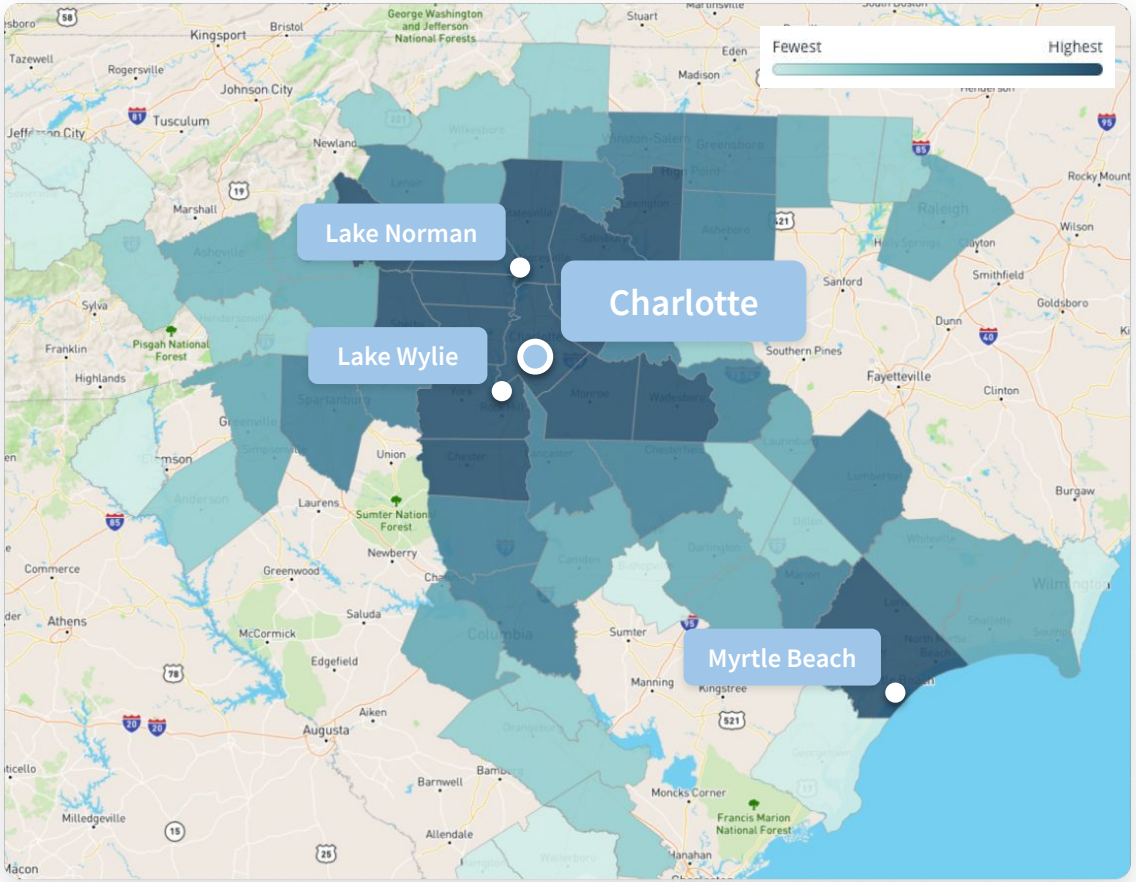


Greater Boston:
Where are the locals going?



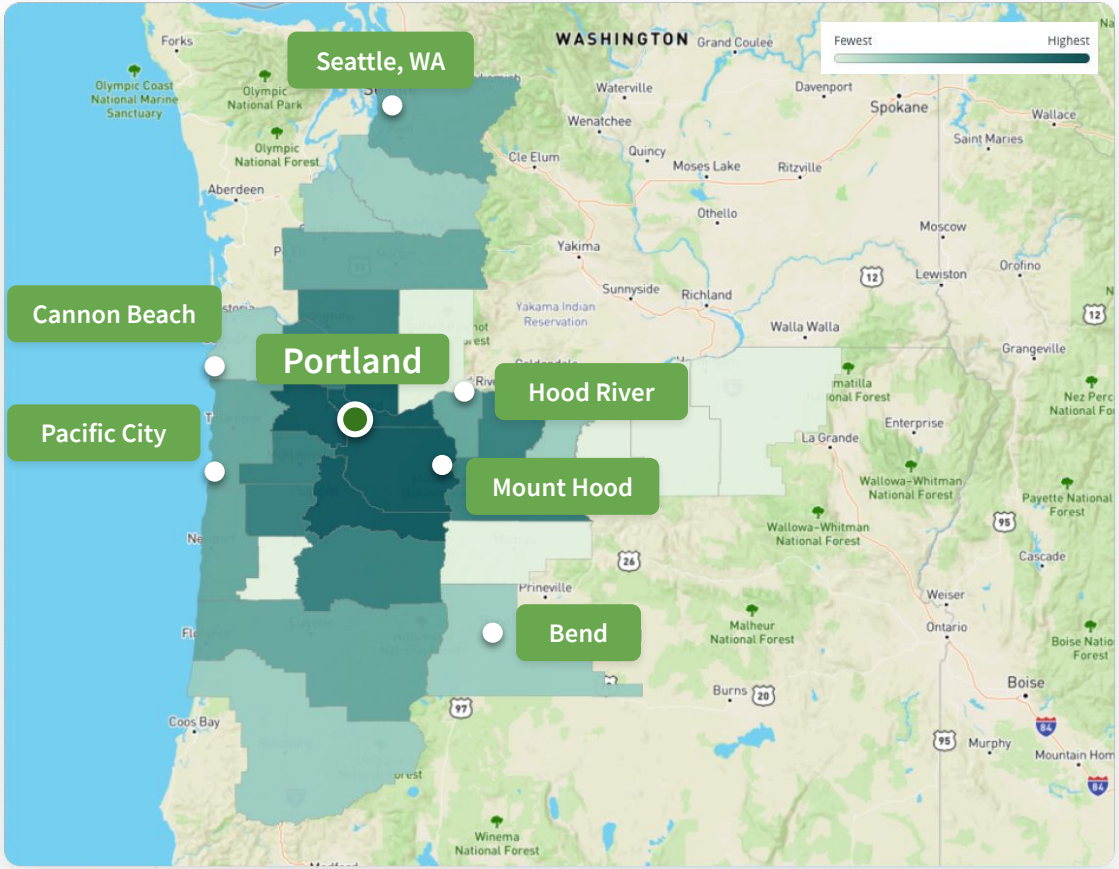
Timeframe: May 18 to June 24, 2020

Charlotte:
Where are the locals going?



Timeframe: May 8 to June 24, 2020

Portland:
Where are the locals going?



Timeframe: May 1 to July 5, 2020

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The State of Tourism Now
&
Questions and Answers

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COVID-19 Recovery Insights

30+ Recovery Insights

Retail
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Multi-Industry
Foot Traffic

Community
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Social
Distancing

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Market-Level Metrics

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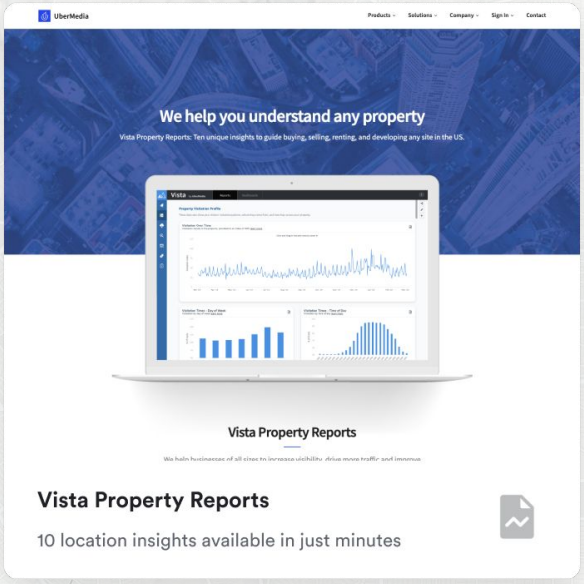

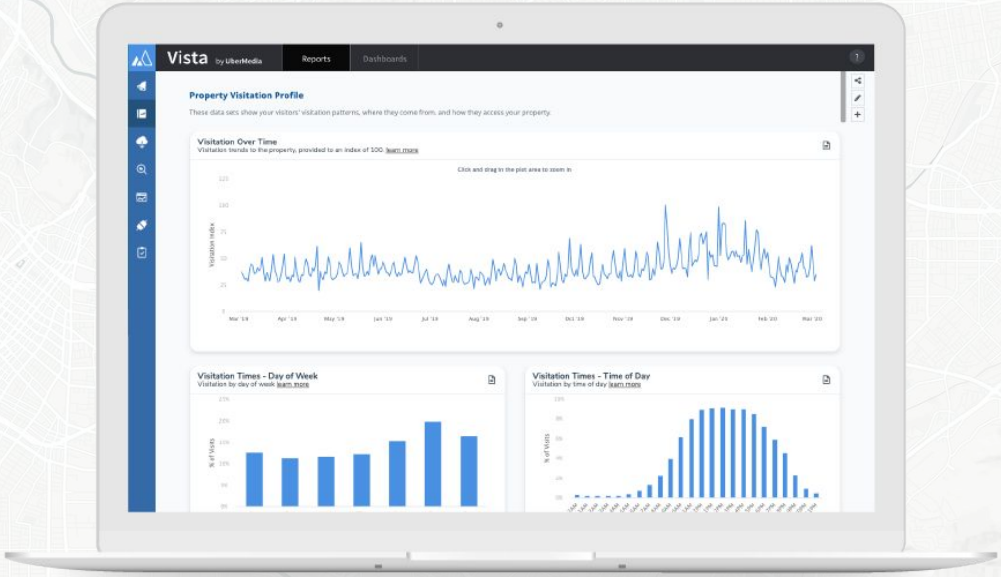

THANK YOU

Questions and Comments?

contact@ubermedia.com

Or contact your UberMedia representative