



DOOR COUNTY TOURISM ZONE COMMISSION
Administrator's Report
November 2020

2020 "NO REPORTS":

- The number of **January-April 2020** "No Reports": One (1) property has failed to report for January-April 2020, but we have received judgments in Circuit Court for Estimated Taxes.
- The number of **May 2020** "No Reports": As of 7/8/2020 there are one hundred forty-two (142) owner-managed properties to report. There were thirty-four (34) agent-managed properties that still require reporting. One hundred seventy-six (176) total for the month of May at first run. The first notice went out on 7/10/2020.
 - As of 9/10/2020 there are fifteen (15) properties that remain to report for May 2020 – with legal counsel.
 - As of 10/8/2020 there are seven (7) properties that remain to report. All are with legal counsel except for one (1).
 - As of 11/12/2020 there are five (5) properties to report for May 2020.
- The number of **June 2020** "No Reports": As of 8-9-2020 there are one hundred twenty-four (124) properties to report for June 2020. The first notice went out on 8-11-2020. The final notice went out on 9-8-2020.
 - As of 9/10/2020 there are forty-five (45) properties that remain to report for June 2020. All properties received the final notice with a deadline.
 - As of 10/8/2020, there are twenty-one (21) to report. The properties were sent on to legal counsel on 9/24/2020 and have all received compliance letters with a final deadline to file.
 - As of 11/12/2020 there are seven (7) properties to report for June 2020.
- The number of **July 2020** "No Reports": As of 9-10-2020 there are one hundred twenty-eight (128) properties to report for July 2020. The first notice went out on 9-11-2020.
 - As of 10/8/2020 thirty-five (35) remain to report for July 2020.
 - As of 11/12/2020 there are twelve (12) properties to report for July 2020.
- The number of **August 2020** "No Reports": As of 10/7/2020 there are ninety-eight (98) properties that remain to report for August 2020, the first notice will go out 10/9/2020.
 - As of 11/12/2020 there are twenty-nine (29) properties to report for August 2020. A final notice went out on 11/11/2020.
- The number of **September 2020** "No Reports": As of 11/8/2020 there are one hundred seventeen (117) owner managed properties plus ten (10) agent-managed properties for a total of one hundred twenty-seven (127) properties to report for September 2020.

PERMITS: As of 11/12/2020 – Fourteen (14) permits were issued – Five (5) were permitted through compliance efforts.

- 10 permits were issued during the same period of 2019
- As of 11/12/2020 there are 1,271 permits
- Property Type Codes: (50) Hotel/Motel, (51) Resort, (52) Inn, (53) Condo, (54) B&B, (56) Cottage/Cabin/Home, (59) Other.

- | | |
|--|--|
| 1. Town of Baileys Harbor (56) – year-round | 10. Town of Gibraltar (53) – year-round- compliance |
| 2. Town of Liberty Grove (56)- seasonal | 11. City of Sturgeon Bay (54) – year-round – property sold and re-permitted |
| 3. Town of Egg Harbor (56)- year-round | 12. Town of Liberty Grove (56)- year-round |
| 4. Town of Union (56) – seasonal | 13. Town of Liberty Grove (56) - year-round – property sold and re-permitted - compliance |
| 5. Town of Union (56) – year-round | 14. Village of Ephraim (56) – year-round - compliance |
| 6. Town of Liberty Grove (56) – year-round – compliance | |
| 7. Town of Gibraltar (56) – year-round | |
| 8. Town of Baileys Harbor (56) – seasonal – compliance | |
| 9. Village of Egg Harbor (53) – year-round – compliance | |

UNPAID TAX/FEES/PENALTIES: The total outstanding due 11/12/2020 is: \$7,927.14 from fifteen (15) permit holders.

	First Notice	Second Notice	Third (Final) Notice	Collections	Attorney	
	\$ 8.04	\$ 115.95		\$ 43.91	\$ 56.99	
	\$ 153.89				\$ 503.01	
	\$ 91.23				\$ 416.17	
	\$ 25.97				\$ 413.54	
	\$ 27.33				\$ 263.57	
	\$2,414.47				\$ 261.50	
	\$ 69.63				\$ 259.56	
	\$ 36.59				\$ 257.49	
	\$ 25.47				\$ 246.40	
	\$ 30.49				\$ 606.80	
	\$ 25.98				\$ 441.26	
	\$ 28.90				\$ 456.61	
	\$ 39.65				\$ 477.55	
					\$ 129.19	
						Total Due
						\$ 7,927.14
TOTALS	\$ 2,977.64	\$ 115.95	\$ -	\$ 43.91	\$ 4,789.64	

UNPERMITTED PROPERTIES:

➤ VRBO as of 10/23/2020: Link to [full audit report](#)

MUNI		# of VRBO Properties 5/4/2020	# of VRBO Properties 6/2/2020	# of VRBO Properties 7/1/2020	# of VRBO Properties 8/4/2020	# of VRBO Properties 10/23/2020
2	Baileys Harbor	69	70	69	68	70
6	Clay Banks	3	3	3	3	3
8	Town of Egg Harbor	64	64	62	59	74
9	Village of Egg Harbor	46	43	41	41	40
11	Ephraim	48	47	48	47	52
12	Gibraltar	83	84	87	85	84
13	Village of Forestville	0	0	0	0	0
14	Town of Forestville	0	0	0	0	0
15	Jacksonport	32	31	30	30	32
27	Nasewaupee	28	29	32	31	30
32	Liberty Grove	63	65	67	69	70
33	Sevastopol	35	34	39	40	40
34	Sister Bay	55	56	56	57	58
35	City of Sturgeon Bay	27	25	26	30	41
36	Town of Sturgeon Bay	22	22	22	22	19
39	Gardner	7	7	8	6	6
42	Union	5	5	5	6	6
46	Washington Island	12	12	13	13	13
Total Actually in Door County		599	597	608	607	638
Not in Door County		16	19	13	16	16
Total		615	616	621	623	654
Vrbo list count		621 5/4/2020	619 6/2/2020	635 7/1/2020	631 8/4/2020	652
over/short		6	3	14	16	2

MUNI	# of VRBO Properties	50 Hotel/Motel	51 Resort	52 Inn	53 Condo	53 Condo @ commercial property	54 B&B	55/56 Cottage Cabin Homes	59 OTHER	No permit req. 30+	Total	Commercial	Non Commercial
2	Baileys Harbor	70	0	0	1	1	0	68	0		70	1	69
4	Brussels	0	0	0	0	0	0	0	0		0	0	0
6	Clay Banks	3	0	0	0	0	0	3	0		3	0	3
8	Town of Egg Harbor	74	0	11	0	0	26	0	37	0	74	37	37
9	Village of Egg Harbor	40	0	0	0	4	0	0	36	0	40	0	40
11	Ephraim	52	0	2	0	0	0	0	50	0	52	2	50
12	Gibraltar	84	0	1	0	16	0	1	64	0	84	2	82
14	Town of Forestville	0	0	0	0	0	0	0	0		0	0	0
15	Town of Jacksonport	32	0	0	0	5	0	0	27	0	32	0	32
27	Nasewaupee	30	0	3	0	0	0	0	27	0	30	3	27
32	Liberty Grove	70	2	1	0	3	0	0	64	0	70	3	67
33	Sevastopol	40	0	0	0	0	0	0	40	0	40	0	40
34	Sister Bay	58	0	1	0	14	0	0	43	0	58	1	57
35	City of Sturgeon Bay	41	4	0	0	5	0	2	30	0	41	6	35
36	Town of Sturgeon Bay	19	0	0	0	0	0	0	19	0	19	0	19
39	Gardner	6	0	0	0	0	0	0	6		6	0	6
42	Union	6	0	0	0	0	0	0	6	0	6	0	6
46	Washington Island	13	0	0	0	0	0	0	13	0	13	0	13
Totals for Door County		6	19	1	48	26	3	533	0	2	638	55	583
		Commercial		Non Commercial									
638		TOTAL IN DC		8.62%		91.38%						638	

The following unpermitted properties are utilizing the VRBO platform:

- 1) VRBO #9446905ha – compliance letter sent 9-8-2020 and 9-28-2020 (currently with attorney)
- 2) VRBO # 2042494 – compliance letter sent 9-16-2020 and 9-28-2020 (currently with attorney)

➤ **Airbnb as of 10/29/2020: Link to [full audit report](#).**

MUNI		5/8/2020	6/8/2020	7/21/2020	Oct-20
2	Baileys Harbor	78	79	79	73
4	Brussels	0	0	0	0
6	Clay Banks	1	1	1	1
8	Town of Egg Harbor	56	59	55	54
9	Village of Egg Harbor	31	29	33	38
11	Ephraim	49	49	54	60
12	Gibraltar	95	91	93	86
14	Town of Forestville	1	1	1	1
15	Town of Jacksonport	14	14	13	15
27	Nasewaupee	23	21	23	23
32	Liberty Grove	68	64	66	68
33	Sevastopol	30	31	30	29
34	Sister Bay	41	38	42	45
35	City of Sturgeon Bay	118	119	115	119
36	Town of Sturgeon Bay	14	16	16	12
39	Gardner	17	16	16	15
42	Union	2	2	2	2
46	Washington Island	27	32	36	33
Subtotal of DoorCounty Only		665	662	675	674

MUNI		# of Airbnb	50	51	52 Inn	53	53 condo	54 R&B	55/56 Cottage	59	30+ day	Total	Commercial	Non Commercial	
2	Baileys Harbor	73	21	0	0	6	0	0	46	0	0	73	27	46	
4	Brussels	0	0	0	0	0	0	0	0	0	0	0	0	0	
6	Clay Banks	1	0	0	0	0	0	0	1	0	0	1	0	1	
8	Town of Egg Harbor	54	0	0	0	1	26	0	27	0	0	54	26	28	
9	Village of Egg Harbor	38	1	0	0	10	6	0	21	0	0	38	7	31	
11	Ephraim	60	11	0	0	0	2	0	47	0	0	60	13	47	
12	Gibraltar	86	11	3	7	6	13	1	43	0	2	86	35	51	
14	Town of Forestville	1	0	0	0	0	0	0	1	0	0	1	0	1	
15	Town of Jacksonport	15	0	0	0	0	0	0	15	0	0	15	0	15	
27	Nasewaupee	23	0	6	0	0	1	0	16	0	0	23	7	16	
32	Liberty Grove	68	0	1	0	1	0	1	65	0	0	68	2	66	
33	Sevastopol	29	0	0	0	0	0	5	24	0	0	29	5	24	
34	Sister Bay	45	2	0	0	6	0	0	37	0	0	45	2	43	
35	City of Sturgeon Bay	119	20	0	19	8	0	11	60	1	0	119	50	69	
36	Town of Sturgeon Bay	12	0	0	0	0	0	0	12	0	0	12	0	12	
39	Gardner	15	7	0	0	2	0	0	6	0	0	15	7	8	
42	Union	2	0	0	0	0	0	0	2	0	0	2	0	2	
46	Washington Island	33	4	0	4	0	0	0	25	0	0	33	8	25	
Totals for Door County		77	10	36	34	48	18	448	1			674			
		674	Total Door County Listings										189	485	
		Commercial	Non Commercial										674		
		28.04%	71.96%												

The following are unpermitted properties utilizing the Airbnb platform:

- 1) Airbnb 23008138 – unable to locate owner - wholesaler
- 2) Airbnb 37886362– unable to locate owner - wholesaler

- 3) Airbnb 23709001 – unable to locate owner – wholesaler – advertised with architectural renderings). As of 10/8/2020 the listing is again live.
- 4) Airbnb 44072623 – compliance email sent 7-21-2020 (current permit holder for other properties- as of 8/13/2020 removed, property is not yet built
- 5) Airbnb 45527394 – compliance letter sent.
- 6) Airbnb 45366668 – unable to locate owner – timeshare.
- 7) Airbnb 4371155 – compliance letter sent.

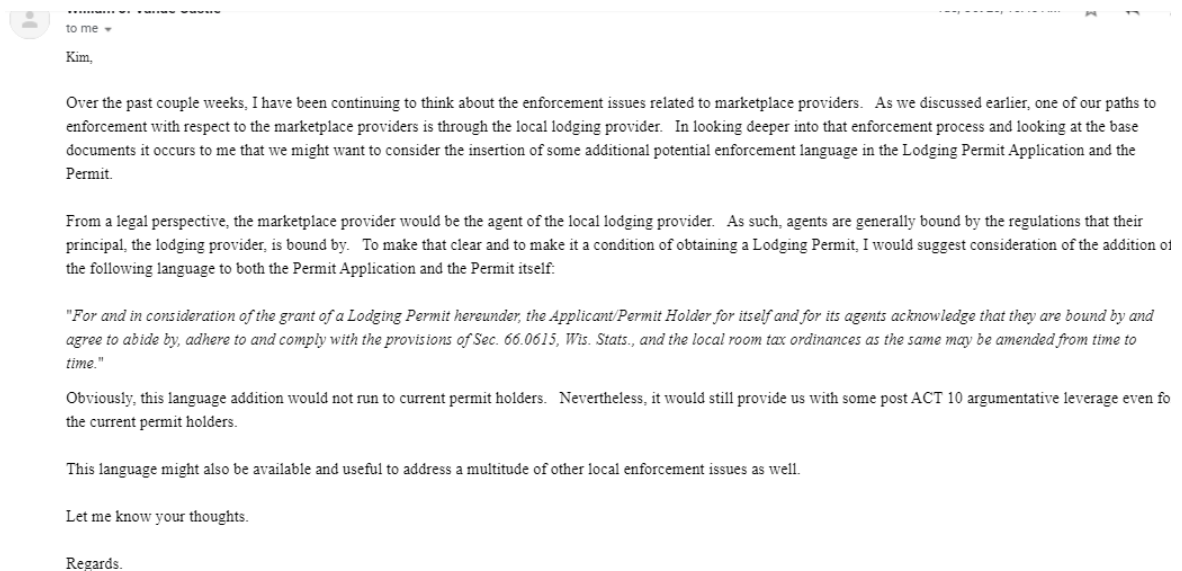
➤ **2021 DRAFT BUDGET:**

For the agenda item, I have included a draft budget for discussion purposes as well as a memo.

➤ **ADMINISTRATIVE ASSISTANT:**

I am pleased to report that an employment offer was made to Jennifer Taylor and she has accepted. She began work on November 8th, 2020. She has experience in the lodging industry in Door County and was also the Director of Accounting for a large ski resort in Colorado prior to moving to the area. She will be working 10-15 hours a week. The first week, she has split her hours over three (3) days.

- **UPDATED PERMIT APPLICATION:** At the recommendation of legal counsel additional language has been added to the permit application. Please see the recommendation below from legal counsel:



While updating the permit, I also added a spot for an emergency contact phone number. Please see the proposed updated permit application at the back of this report for approval. Going forward, to assist the municipalities, when we issue the bi-annual permitted property report, I will include the responsible party contact as well as the emergency number on file.

➤ **2020 MEETING SCHEDULE:**

I believe it will be some time before we can meet in person. Below is the proposed 2021 meeting schedule and information to be distributed.

2021 Meeting Schedule

Due to the COVID-19 virus and current Public Health Emergency, necessary precautions have been put in place to ensure safety of the Commission/Executive Committee members and the public. All meetings until further notice will be held via Zoom, but also accessible by telephone.

The members of the public are encouraged to view and listen to the meeting. To connect electronically, please review the [monthly agendas](#), follow the hyperlink to login into Zoom or dial the telephone number and follow the prompts for Zoom login into the meeting.

When it is time to resume in-person meetings, an updated schedule will be issued with locations.

January 21st, 2021: Executive Committee Meeting via Zoom at 9 AM

February 18th, 2021: Full Commission Meeting via Zoom at 9 AM

March 18th, 2021 Executive Committee Meeting via Zoom at 9 AM

April 15th, 2021 Full Commission Meeting via Zoom at 9 AM

May 20th, 2021 Executive Committee Meeting via Zoom at 9 AM

June 17th, 2021 Full Commission Meeting via Zoom at 9 AM

July 15th, 2021 Executive Committee Meeting via Zoom at 9 AM

August 19th, 2021 Full Commission Meeting via Zoom at 9 AM

September 16th, 2021 Executive Committee Meeting via Zoom at 9 AM

October 21st, 2021 Full Commission Meeting via Zoom at 9 AM

November 18th, 2021: Executive Committee Meeting via Zoom at 9 AM

December 16th, 2021: Full Commission Meeting via Zoom at 9 AM

COVID STUDY -

Dear Tourism Partners –

Attached is the Longwood's Wave 24 Covid-19 Travel Sentiment Study for your review. Highlights are in the press release below. ([The full study is at the back of this report.](#))

David Spiegelberg

Press Release re: Covid Study from Longwoods International

Rising COVID-19 Case Numbers Taking a Toll on Travel Plans

According to the most recent Longwoods International tracking study of American travelers, 58% have travel plans in the next six months, the lowest percentage since the beginning of the pandemic in early March. The percentage of travelers with travel plans in the next six months hovered around 70% for months after dropping from 87% on March 11th at the start of the pandemic in the U.S. "Record new daily coronavirus case levels continue to weaken travel demand," said Amir Eylon, President and CEO of Longwoods International. "Concern about the virus is the driving force in decision making about upcoming trips, including during the holidays."

As we near the holiday season, fewer American travelers plan to take a trip during the holidays. According to the most recent survey, 53% are not planning any travel during the holiday season, up from 48% a month ago. Some 38% are planning to travel by car during the holiday period, while 17% will travel by air.

The survey, supported by Miles Partnership, was fielded November 4, 2020 using a national sample randomly drawn from a consumer panel of 1,000 adults, ages 18 and over. Quotas were used to match Census targets for age, gender, and region to make the survey representative of the U. S. population.

For highlights and week-over-week comparisons, please see the attached document.

More Information – Longwoods International: <https://longwoods-intl.com/news-press-release/covid-19-travel-sentiment-study-wave-24>

More Information – Miles Partnership: covid19.milespartnership.com/

By Property Report – First run to first run YOY

September 2020					
Type	Revenue	Units Available	Units Filled	% Occupancy	ADR
Hotel/Motel (50)	\$2,718,717.40	30,172	18,767	62.20%	\$144.87
Resort (51)	\$4,679,020.62	44,487	25,229	56.71%	\$185.46
Inn (52)	\$670,203.17	6,506	3,969	61.01%	\$168.86
Total Commercial	\$8,067,941.19	81,165	47,965	59.10%	\$168.20
Condo (53)	\$886,205.87	7,121	4,139	58.12%	\$214.11
Bed & Breakfast (54)	\$356,155.27	3,034	1,611	53.10%	\$221.08
Cottage/House/Cabin (55/56)	\$3,858,587.52	25,950	13,791	53.14%	\$279.79
Other (59)	\$47,209.02	1,324	409	30.89%	\$115.43
Total Non-Commercial	\$5,148,157.68	37,429	19,950	53.30%	\$258.05
TOTALS	\$ 13,216,098.87	118,594	67,915	57.27%	\$194.60

September 2019					
Type	Revenue	Units Available	Units Filled	% Occupancy	ADR
Hotel/Motel (50)	\$2,773,259.10	31,108	20,281	65.20%	\$136.74
Resort (51)	\$5,105,504.10	49,292	29,579	60.01%	\$172.61
Inn (52)	\$673,659.77	6,522	4,206	64.49%	\$160.17
Total Commercial	\$8,552,422.97	86,922	54,066	62.20%	\$158.18
Condo (53)	\$805,357.16	7,821	4,469	57.14%	\$180.21
Bed & Breakfast (54)	\$379,656.65	3,168	1,830	57.77%	\$207.46
Cottage/House/Cabin (55/56)	\$2,575,280.29	27,266	10,809	39.64%	\$238.25
Other (59)	\$48,220.67	1,441	369	25.61%	\$130.68
Total Non-Commercial	\$3,808,514.77	39,696	17,477	44.03%	\$217.92
TOTALS	\$ 12,360,937.74	126,618	71,543	56.50%	\$172.78

Analysis * these are at month end reports not year end re-run comparison

Type	Diff YOY \$	DIFF UNITS	DIFF FILLED	DIFF OCCUP	DIFF ADR
Hotel/Motel (50)	(\$54,541.70)	(936)	(1,514)	-3.00%	\$8.13
Resort (51)	(\$426,483.48)	(4,805)	(4,350)	-3.30%	\$12.85
Inn (52)	(\$3,456.60)	(16)	(237)	-3.48%	\$8.69
Total Commercial	(\$484,481.78)	(5,757)	(6,101)	-3.10%	\$10.02
Condo (53)	\$80,848.71	(700)	(330)	0.98%	\$33.90
Bed & Breakfast (54)	(\$23,501.38)	(134)	(219)	-4.67%	\$13.62
Cottage/House/Cabin (55/56)	\$1,283,307.23	(1,316)	2,982	13.50%	\$41.54
Other (59)	(\$1,011.65)	(117)	40	5.28%	(\$15.25)
Total Non-Commercial	\$1,339,642.91	(2,267)	2,473	9.27%	\$40.14
TOTALS	\$ 855,161.13	(8,024)	(3,628)	0.76%	\$21.82

Still to report for September 2020				
Hotel/Motel (50)		4		
Resort (51)		3		
Inn (52)		0		
Condo (53)		16		
B&B (54)		0		
Cottage/Cabin/Home (56)		102		
Other (59)		2		
Total to Report:		127		

Deactivated Permits through 10-7-2020 through 11-12-2020:

Municipality	Permit #	Removed	Lodging Name	Lodging Address	Owner	Reason for Removal
Village of Ephraim	11-53-0359-00	10/21/2020	Ephraim Condo #323	3114 Larson Lane	Barbara Small	Only renting through Lundquist Realty (was a split permit).
Town of Liberty Grove	32-56-0403-00	10/21/2020	Beach at Sky Ledge	772 Wisconsin Bay Road	Dan Schaulis	Property Sold.
Town of Liberty Grove	32-56-1589-00	11/2/2020	Little House in the Woods	1136 Wagon Trail	Carolyn Length	Property sold – new owner via compliance
City of Sturgeon Bay	35-54-0834-00	11/2/2020	Black Walnut Guest House	454 N 7 th Ave	Geri Ballard	Property Sold – new permit #2363
Town of Clay Banks	06-56-1147-00	11/3/2020	O'Neil - 290 Clar Lin Rd	290 Clar Lin Rd	Robert and Mary O'Neil	Property Sold
Town of Sturgeon Bay	36-56-1814-00	11/3/2020	A Spirit of Adventure- Wadkins -	2986 Lake Forest Park Road	Mercedes Wadkins	No longer renting.
Town of Gibraltar	12-53-0212-01	11/3/2020	Northhaven- #31001 - Powhatan - Door Family	3701 Northhaven Dr. #31001	Powhatan Investors	Property Sold.
Town of Washington	46-56-1062-11	11/3/2020	Cove, The -Haupt #107	288 Hemlock	Paul Haupt	Property sold.
Village of Sister Bay	34-56-1834-01	11/3/2020	Sunshine Meadows Farmhouse - Schwark	2649 S Bay Shore Drive	Nicole Schwark	Property sold.
Town of Jacksonport	15-56-2119-00	11/3/2020	Beautiful Farmhouse	3855 Bagnall	Margaret Quinlan	No longer renting.
Village of Sister Bay	34-56-0105-00	11/3/2020	Anderson Cottage	10809 N Bay Shore Dr	Mary Jo Anderson	Property sold.
Village of Egg Harbor	09-59-1360-00	11/4/2020	Meadow Ridge Woudstra (timeshare))	7573 STH 42 Unit J37	Jim D Woudstra	Entire property sold.
Town of Washington	46-56-0731-00	11/5/2020	Coffee Creek Cabins	1928 Gasoline Town Road	Dawn Chier	Property sold.
Town of Liberty Grove	32-56-1977-00	11/9/2020	The Cottage Haas	11318 Beechwood Lane	Douglas Haas	Property sold.
Town of Egg Harbor	08-56-1962-00	11/9/2020	Pebble Beach House	6026 Pebble Beach Lane	Edgar and Nancy Muenzer Trust	Property Sold.
Village of Sister Bay	34-56-0743-00	11/9/2020	Sweetbriar Country Home	10315 Orchard Drive	Deb Homan	Property Sold.



DOOR COUNTY TOURISM ZONE COMMISSION

PO Box 55, Sister Bay, WI. 54234

Phone: 920-854-6200 / Fax: 920-854-9019

Email: info@doorcountytourismzone.com

Website: www.DoorCountyTourismZone.com

Any changes to the information below must be reported within 14 days

Check Applicable Box

New Application

☐

Change Information on File

☐

Owner Information				Lodging/Rental Physical Location							
Name and Business Entity Ownership (both required if applicable):				Property Name (if applicable)							
Mailing Address				Address or Fire Number (No P.O. numbers)							
City	State	ZIP		City	ZIP						
Phone				Municipality							
E-mail address:				Type of Lodging							
WI State Sales Tax ID or FEIN:				<input type="checkbox"/> Hotel/Motel							
REQUIRED: Driver's License Number:				<input type="checkbox"/> Resort							
Individual Responsible for Paying Tax * (e.g., rental agent, CPA, lawyer)				<input type="checkbox"/> Inn							
Owner <input type="checkbox"/> If "Other," fill in below:				<input type="checkbox"/> Condominium Property							
Name				<input type="checkbox"/> B & B							
Mailing Address				<input type="checkbox"/> Cottage / Cabin / House							
Address 2				Number of units: _____							
City				NOTE: One house on one property counts as 1 Unit (not # of bedrooms unless rented to different paying guests, as in a B&B). If there are 2 houses (rented separately) on one property, it counts as 2 Units, etc.							
State											
Zip											
Phone Number				Cell phone:							
E-mail address:				Fax number:							
* If the individual responsible for collecting and remitting the Room Tax changes, such as a change in ownership or a change in the											
Operating Period & Number of Units Available											
Indicate the units offered for rent during each month of the year (e.g., if some non-winterized units are closed in winter but some are kept open) If you are advertising that the property is available certain months, the operating period must match.											
<input type="checkbox"/> Open year-round											
Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Certificate											
I, the undersigned, hereby apply for a Door County Tourism Zone Lodging Permit and certify that all the information herein is true and correct to the best of my knowledge. For and in consideration of the grant of a Lodging Permit hereunder, the Applicant/Permit Holder for itself and for its agents acknowledge that they are bound by and agree to abide by, adhere to and comply with the provisions of Sec. 66.0615, Wis. Stats., and the local room tax ordinances as the same may be amended from time to time.											
Signature				Date				Daytime Phone Number			
Print Name				E-mail Address							
Approvals											
Date Received						Date Issued					
Approved By						Permit Number					



Travel Sentiment Study Wave 24

NOVEMBER 10, 2020

 Longwoods
INTERNATIONAL

|  miles
PARTNERSHIP

COVID-19

TRAVEL SENTIMENT STUDY WAVE 24

Fielded November 4, 2020

U.S. National Sample of 1,000 adults 18+

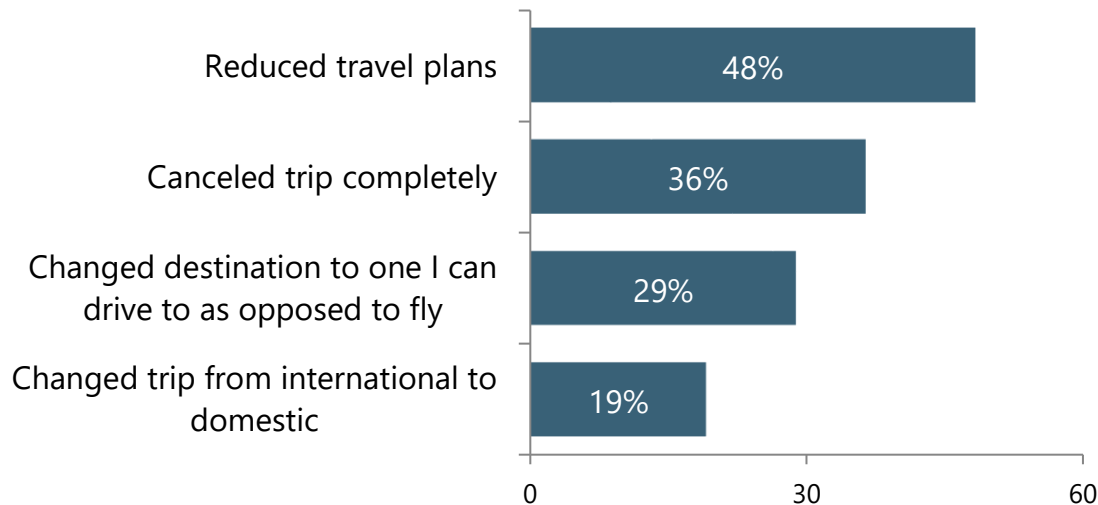
 Longwoods
INTERNATIONAL

| 
PARTNERSHIP

IMPACT ON TRAVEL PLANS



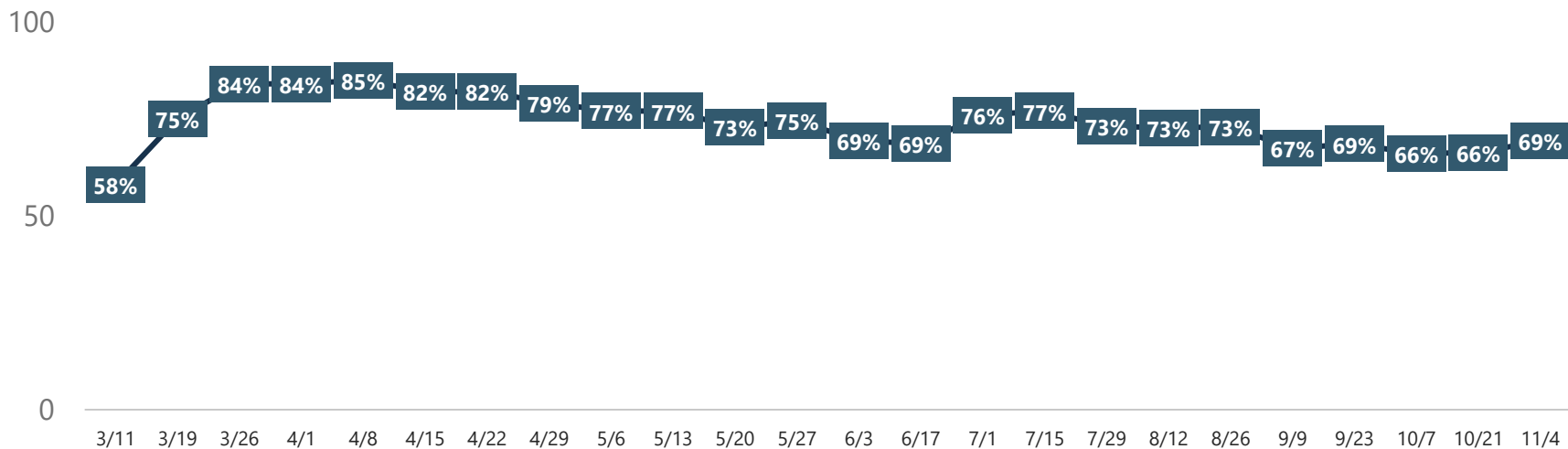
of travelers planning to travel in the next six months will change their travel plans due to coronavirus



Base: Coronavirus Changed Travel Plans

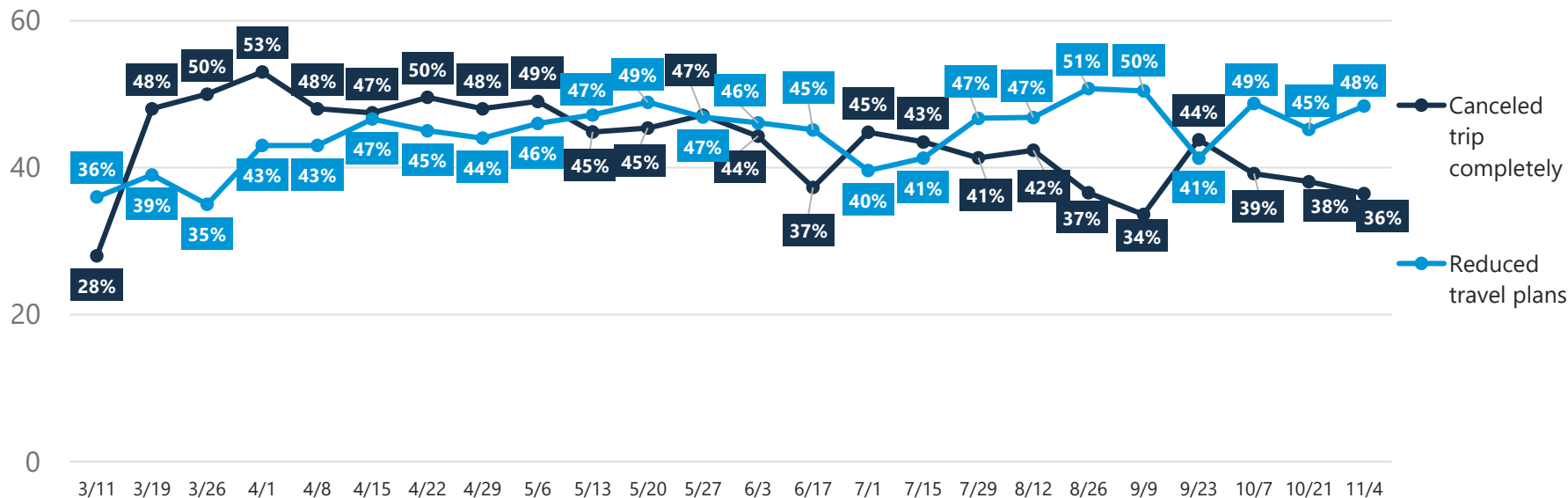
IMPACT ON TRAVEL PLANS

Travelers Planning to Change Upcoming Travel Plans Due to COVID-19 Comparison



IMPACT ON TRAVEL PLANS

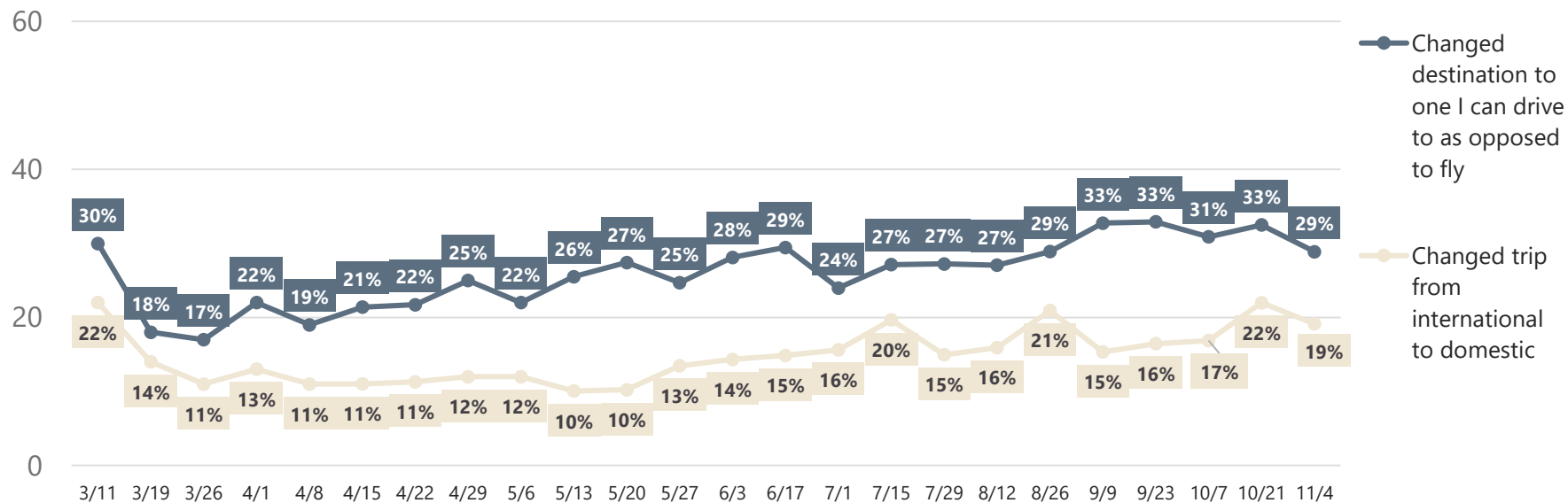
Impact of COVID-19 on Upcoming Travel Plans Comparison



Base: Coronavirus Changed Travel Plans

IMPACT ON TRAVEL PLANS

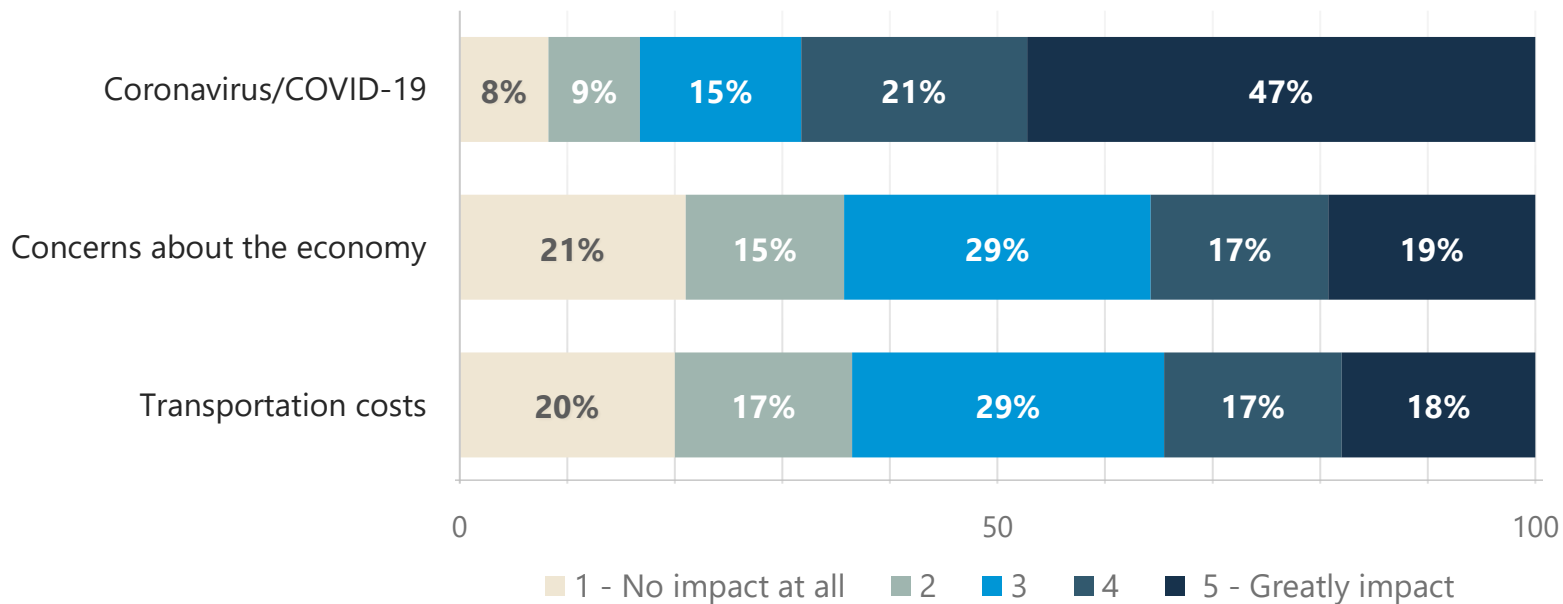
Impact of COVID-19 on Upcoming Travel Plans Comparison



Base: Coronavirus Changed Travel Plans

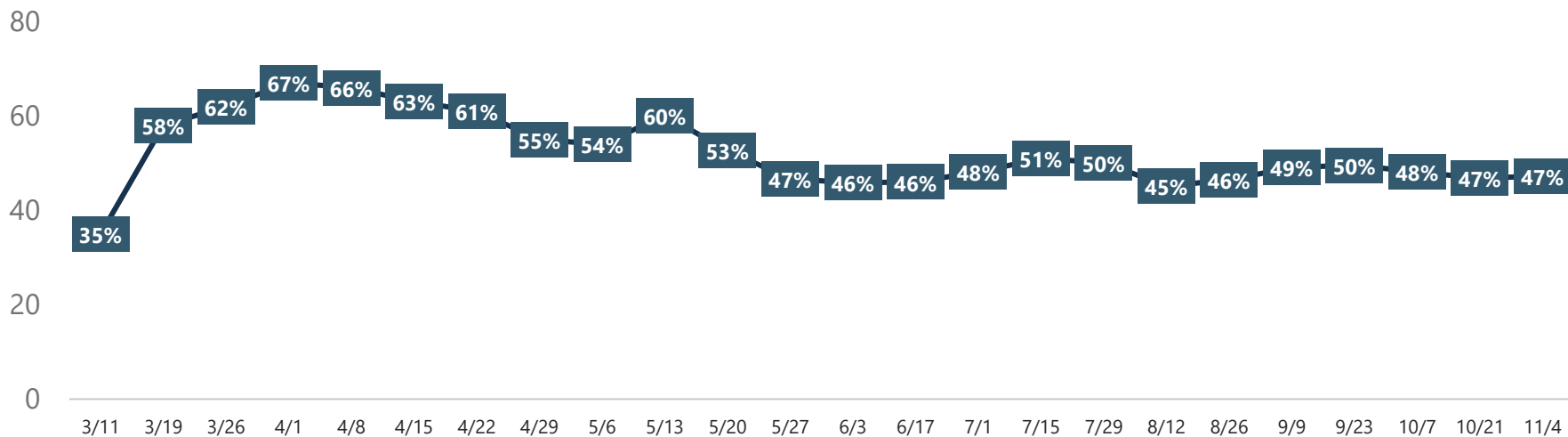
IMPACT ON TRAVEL PLANS

Factors Impacting Decisions to Travel in Next 6 Months



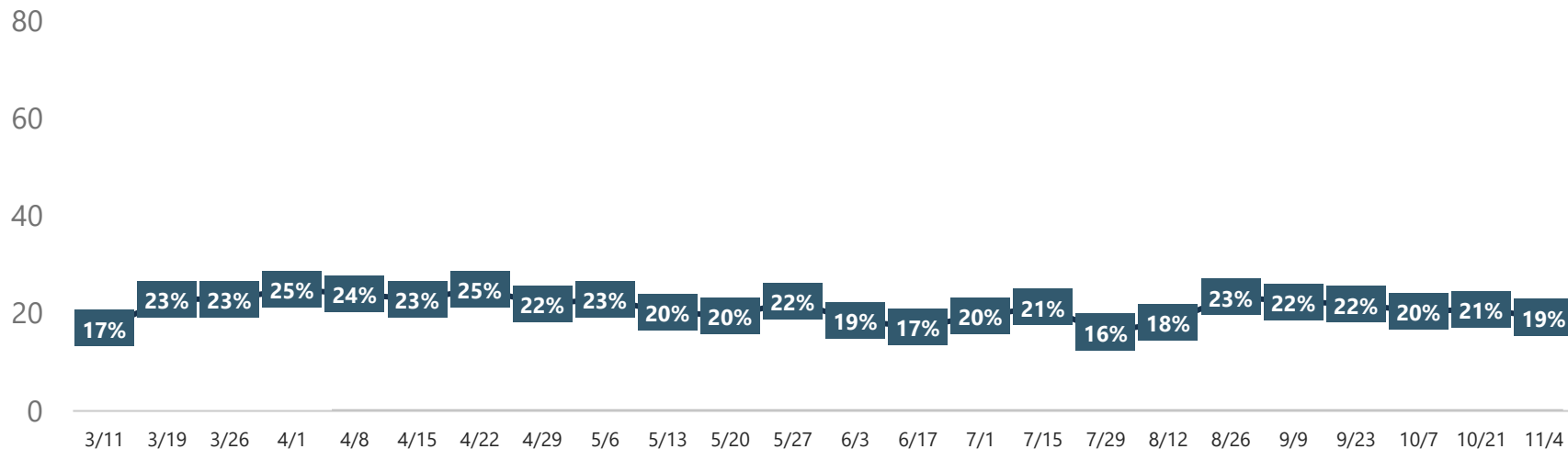
IMPACT ON TRAVEL PLANS

Indicated that Coronavirus Would Greatly Impact their Decision to Travel in the Next Six Months



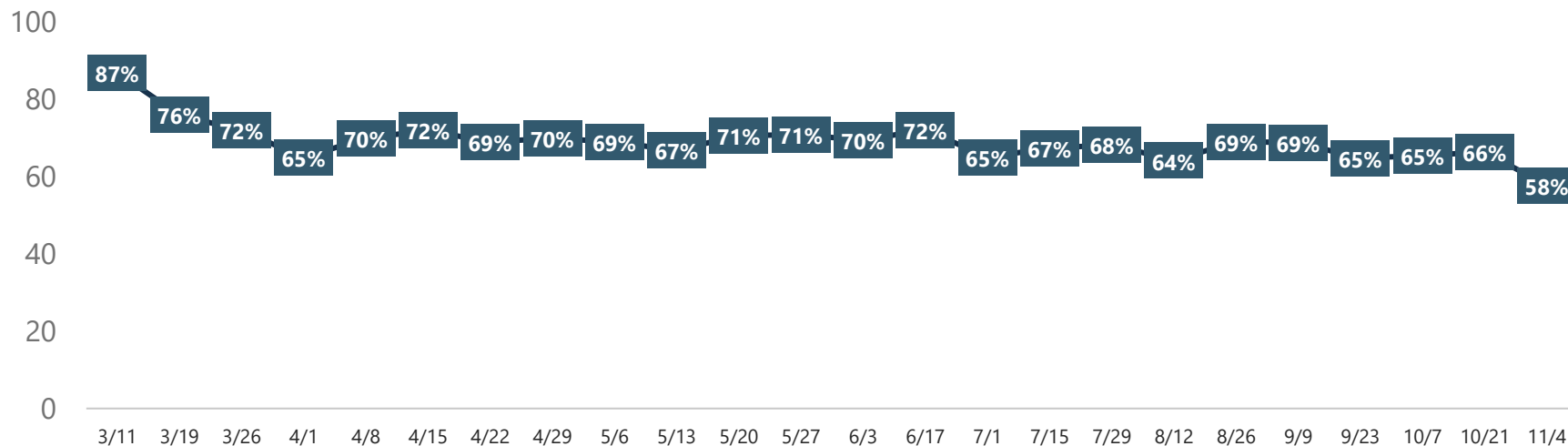
IMPACT ON TRAVEL PLANS

Indicated that the Economy Would Greatly Impact their Decision to Travel in the Next Six Months



IMPACT ON TRAVEL PLANS

Travelers with Travel Plans in the Next Six Months Comparison



UPCOMING HOLIDAY TRAVEL PLANS*



53%

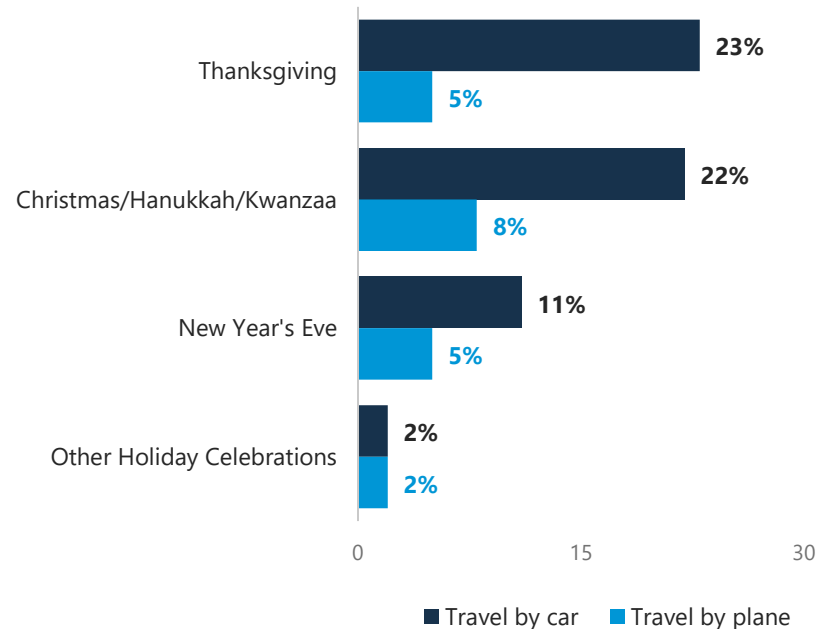
are not planning to take a trip this holiday season



38%
will travel
by car



17%
will travel
by plane



Base: All travelers

**Involving traveling at least 50 miles from home*

Travel Sentiment Study Wave 24

UPCOMING HOLIDAY TRAVEL PLANS*

Comparison to Wave 22 (October 7th)



53%

are not planning to take a trip this holiday season



38%
**will travel
by car**



17%
**will travel
by plane**



**Involving traveling at least 50 miles from home*

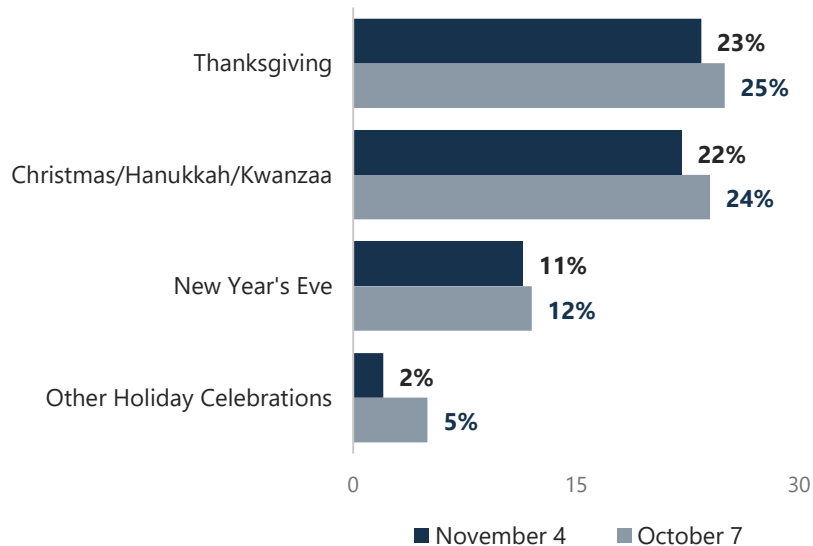
Travel Sentiment Study Wave 24

Base: All travelers

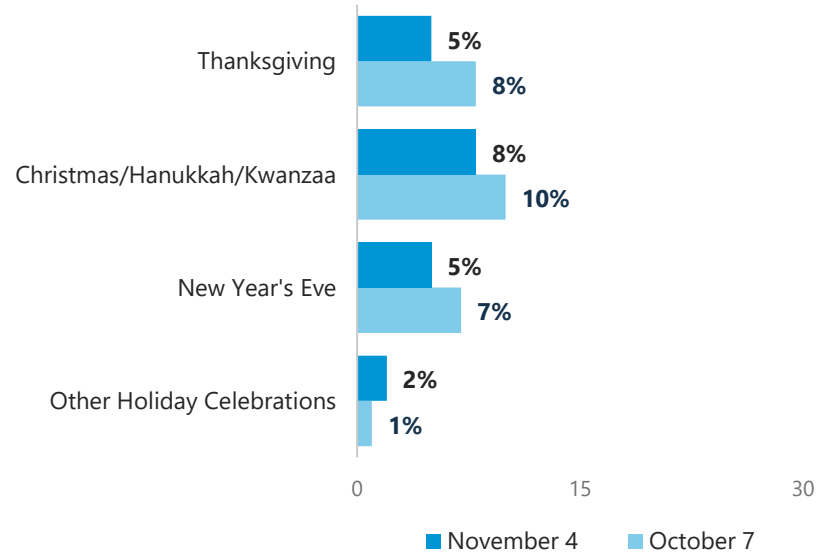
UPCOMING HOLIDAY TRAVEL PLANS*

Comparison to Wave 22 (October 7th)

Travel by



Travel by



*Involving traveling at least 50 miles from home

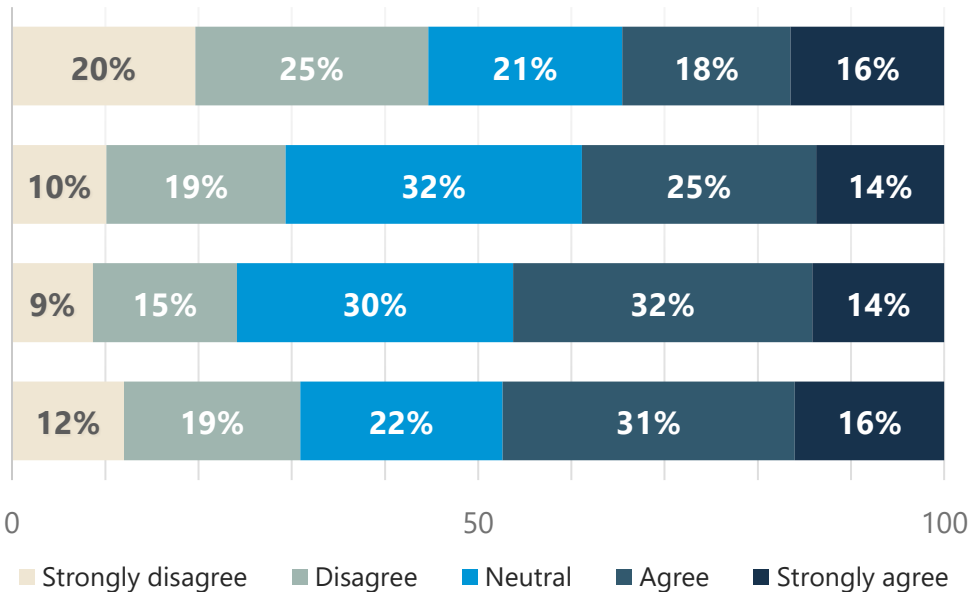
Travel Sentiment Study Wave 24

Base: All travelers

TRAVEL PERCEPTIONS

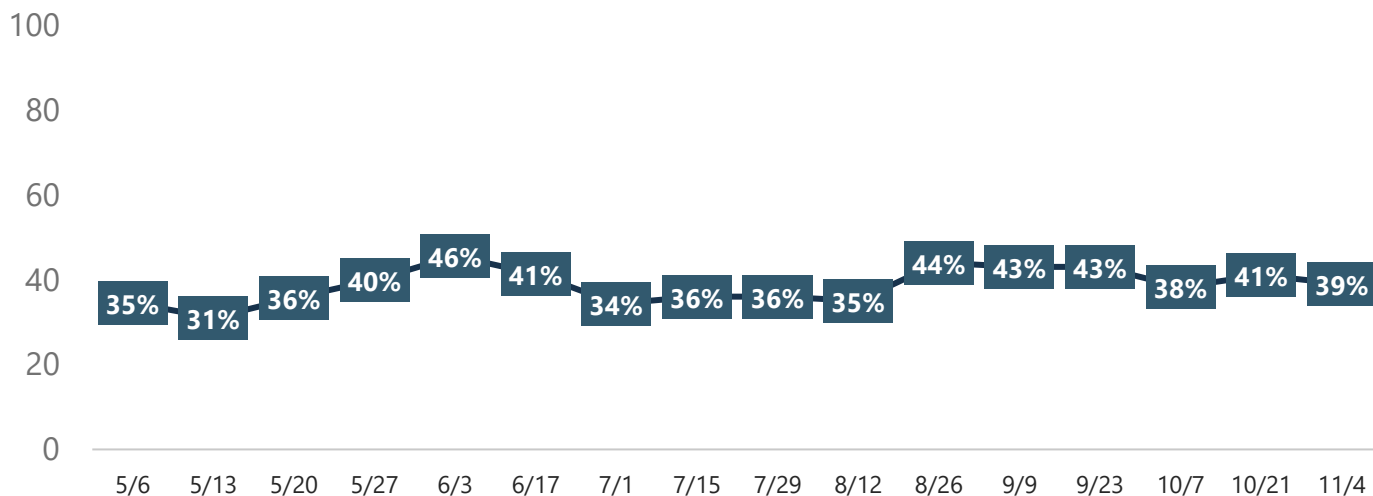
Perceptions of Safety and Travel

I do not plan to travel until there is a COVID-19 vaccine



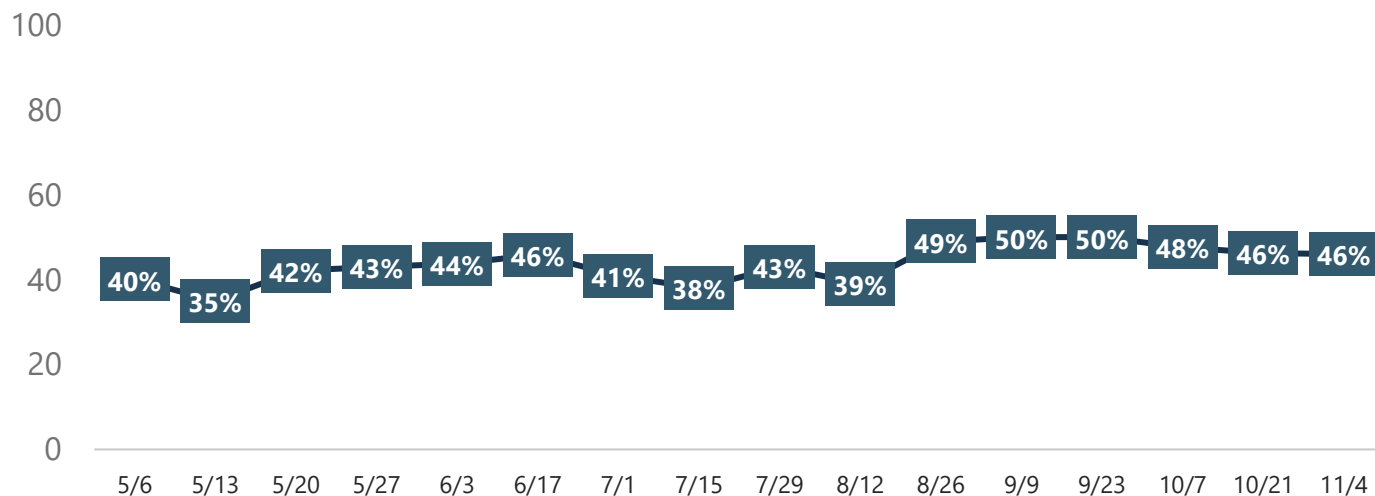
TRAVEL PERCEPTIONS

I Support Opening Up My Community to Visitors Comparison of Travelers Who Strongly Agree or Agree



TRAVEL PERCEPTIONS

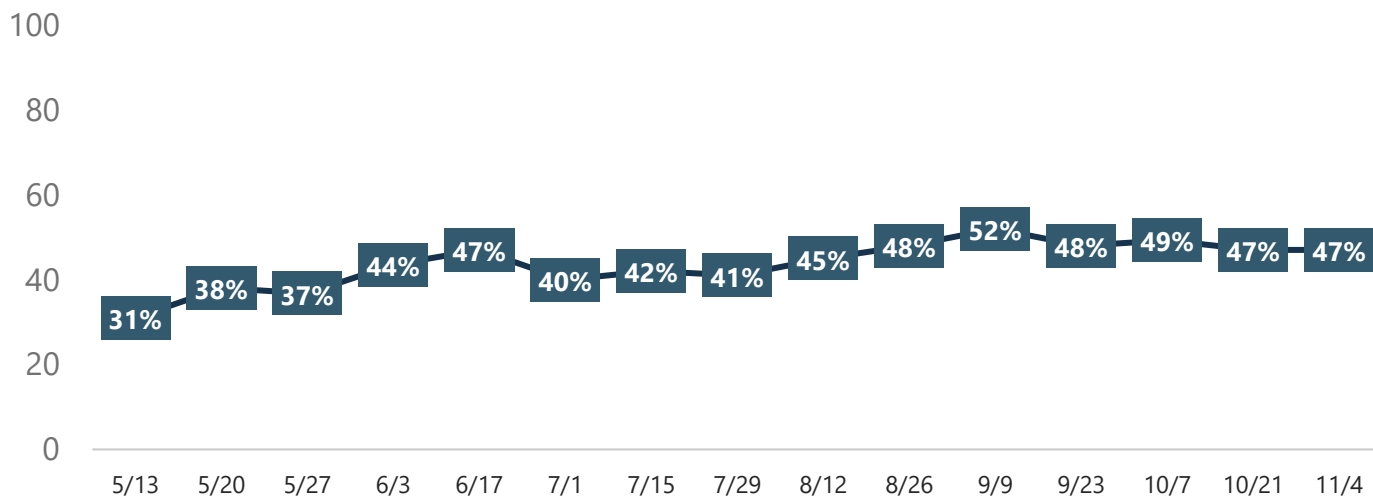
I Feel Safe Traveling Outside My Community Comparison of Travelers Who Strongly Agree or Agree



TRAVEL PERCEPTIONS

I Would Feel Safe Dining in Local Restaurants and Shopping in Retail Stores Within My Community

Comparison of Travelers Who Strongly Agree or Agree



Additional Resources

Longwoods International Research
longwoods-intl.com/covid-19

Miles Partnership COVID-19 Communication Center
covid19.milespartnership.com

Thank You

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INTERNATIONAL

miles
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2020 U.S. hotel forecast slightly upgraded; full recovery still unlikely until 2024

🕒 12 November 2020 📁 Forecast 💬 Comments 0

With leisure demand stronger than anticipated in the fall, [STR](#) and [Tourism Economics](#) slightly upgraded the final 2020 U.S. hotel forecast just released during the virtual [NYU Hospitality Conference](#). Regardless of the short-term upgrade, the forecast for 2021 remains functionally unchanged and full recovery in revenue per available room (RevPAR) is unlikely until 2024.

“Even with the encouraging vaccine news of this week, this pandemic and the subsequent economic impact will continue to limit hotel demand generators through the second half of next year,” said Amanda Hite, president of STR. “Business demand won’t return at a substantial level until caseloads are better contained. In the meantime, recovery is going to be primarily driven by lower-tier hotels in the leisure-driven markets with outdoor offerings.”

“The economy has entered a slower stage of recovery, and COVID-19 will continue to shape travel conditions in coming quarters,” said Adam Sacks, president of Tourism Economics. “Assuming substantial progress is made against the virus in the first half of 2021, we anticipate travel demand will rebound strongly in the second half.”

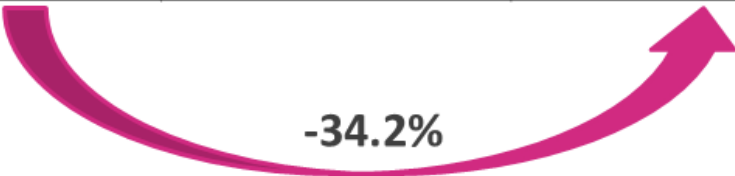
STR and Tourism Economics project the industry will recapture 80% of demand by the end of 2021, although RevPAR will be 34.2% lower than in 2019. Average daily rate (ADR) and revenue will follow a slower recovery timeline, putting the industry on pace for full demand recovery at the end of 2023 and a return to pandemic RevPAR levels by the close of 2024.

U.S. Forecast

Key Performance Indicators
2019 – 2020F – 2021F



Metric	2019 Actual	2020 Forecast	2021 Forecast
Occupancy *	66.0%	42.2%	52.2%
ADR	\$131.22	\$103.65	\$109.21
RevPAR *	\$86.67	\$43.76	\$57.03



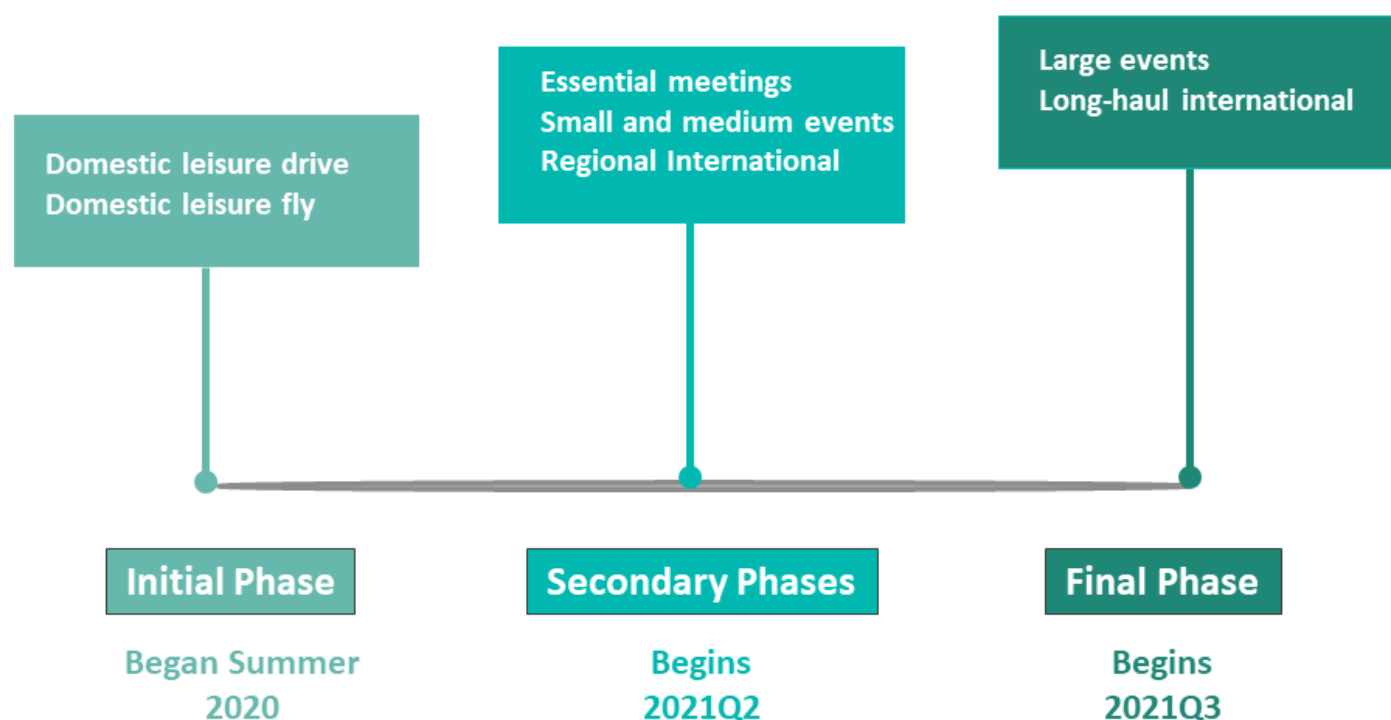
*Reflects Total-Room-Inventory (TRI) methodology, which assumes no temporary hotel closures.

Source: STR
2020 © CoStar Realty Information, Inc.



U.S Anatomy of Travel Recovery

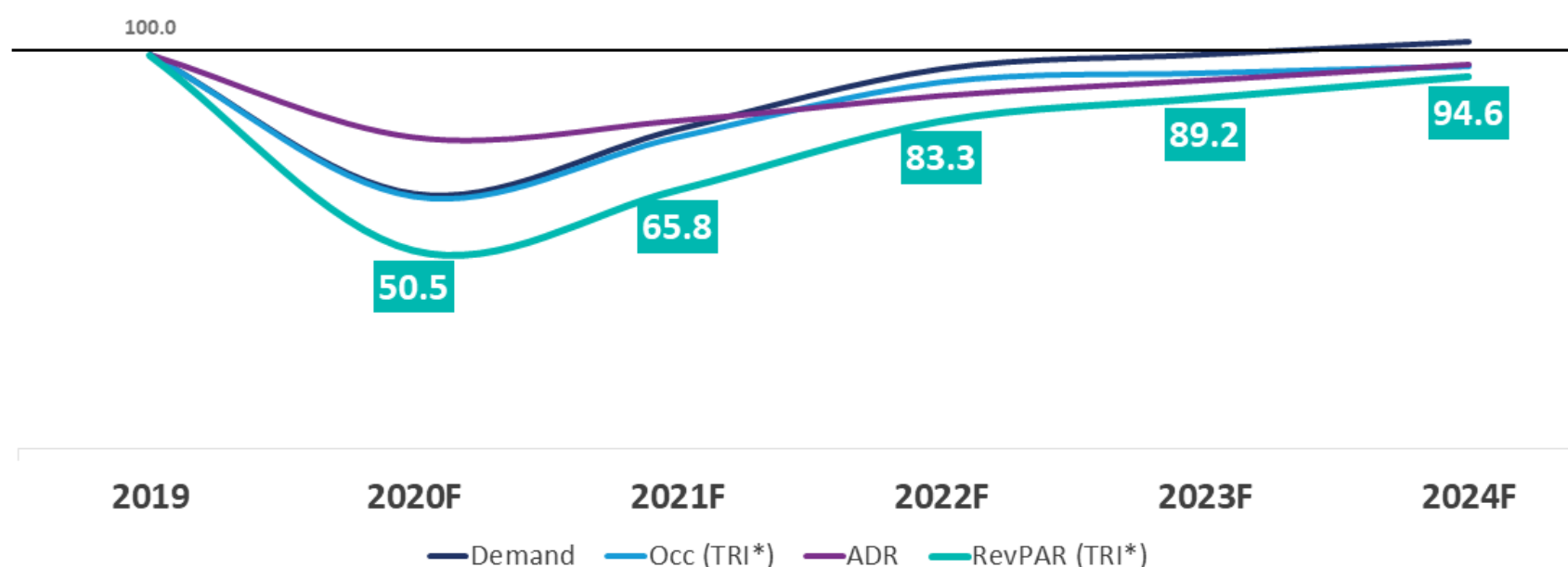
2020 – 2021



Source: STR. 2020 © CoStar Realty Information, Inc.

U.S. Forecast: COVID-19 Recovery Scenario

Indexed to end of 2019
2019 – 2024F



*Reflects Total-Room-Inventory (TRI) methodology, which assumes no temporary hotel closures.

Source: STR. 2020 © CoStar Realty Information, Inc.

A note to editors: All references to STR data and analysis should cite “STR” as the source. Please refrain from citing “STR, Inc.” “Smith Travel Research” or Global” in sourcing as those names no longer fit within the STR brand.

About STR

STR provides premium data benchmarking, analytics and marketplace insights for global hospitality sectors. Founded in 1985, STR maintains a presence in 100+ countries with a corporate North American headquarters in Hendersonville, Tennessee, an international headquarters in London, and an Asia Pacific headquarters in Singapore. STR was acquired in October 2019 by CoStar Group, Inc. (NASDAQ: CSGP), the leading provider of commercial real estate information, analytics and online marketplaces. For more information, please visit str.com and costargroup.com.

About Tourism Economics

Tourism Economics, an Oxford Economics company, focuses on the intersection of the economy and travel sector, providing actionable insights to our clients. <https://str.com/press-release/2020-us-hotel-forecast-slightly-upgraded-full-recovery-still-unlikely-until-2024>



...conomy continues, an entire economic company, focused on the movement of the economy and travel sector, providing economic insight to our clients.

We provide our worldwide client base with direct access to the most comprehensive set of historic and forecast travel data available. And our team of specialized economists develops custom economic impact studies, policy analysis, and forecast models.

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