COVID 19
CURRENT IMPACT

Year-over-Year Change in Hotel Demand

- Florida
- United States

This data is provided by STR, Inc.
YoY Change in New Vacation Rental Bookings

Select a Region by Clicking This Dropdown Menu

Statewide
CURRENT IMPACT

![Graph showing user comparison between Jan 1, 2020 - Apr 9, 2020 and Jan 1, 2019 - Apr 9, 2019]
Time Between Pandemic End and Doing Activities

Select a Survey Wave by Clicking This Dropdown Menu

Wave 6: Apr 3-5, 2020

- Go out to dinner
  - Immediately: 12%
  - 1-30 Days: 29%
  - 2-3 Months: 23%
  - 4-6 Months: 16%
  - 7-11 Months: 6%
  - 1 Year or More: 8%
  - Never Again: 0%

- Stay in a hotel
  - Immediately: 5%
  - 1-30 Days: 10%
  - 2-3 Months: 18%
  - 4-6 Months: 19%
  - 7-11 Months: 11%
  - 1 Year or More: 16%
  - Never Again: 0%

- Fly on a plane
  - Immediately: 5%
  - 1-30 Days: 9%
  - 2-3 Months: 14%
  - 4-6 Months: 14%
  - 7-11 Months: 9%
  - 1 Year or More: 19%
  - Never Again: 6%

- Take a cruise
  - Immediately: 4%
  - 1-30 Days: 4%
  - 2-3 Months: 6%
  - 4-6 Months: 8%
  - 7%: 21%
  - 1-3 Months: 15%
  - Never Again: 0%
Longwoods International has been fielding a weekly tracking study of the effects of COVID-19 on travel for domestic travelers. The fourth wave of the study, fielded April 1, 2020, found continued decreases in the percentage of respondents who plan to travel during the next six months. More for detailed results, you can visit their website by clicking here.
Americans’ First Trip Destination Post-Pandemic

- Beach destinations/resorts: 38.2%
- Small towns, villages or rural destinations/attractions: 30.0%
- Cities or metropolitan areas: 26.6%
- U.S. National Parks: 20.4%
- Mountain destinations/resorts (including ski resorts): 19.7%
- State, county or regional parks or recreation areas: 16.1%
- Theme or amusement parks: 13.6%
- Desert destinations/resorts: 9.9%
- Campground or cabin site: 9.3%
- Cruise trip: 5.7%
- RV or motorhome trip: 4.8%

The Future
<table>
<thead>
<tr>
<th>2020 vs. 2019</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Room Nights</td>
<td>April</td>
<td>(50-55%)</td>
<td></td>
</tr>
<tr>
<td>Online Room Nights</td>
<td>May</td>
<td>(40-45%)</td>
<td></td>
</tr>
<tr>
<td>Online Room Nights</td>
<td>June</td>
<td>(15-20%)</td>
<td></td>
</tr>
<tr>
<td>Online Room Nights</td>
<td>July</td>
<td>(20-25%)</td>
<td></td>
</tr>
<tr>
<td>Online Room Nights</td>
<td>August</td>
<td>8-10%</td>
<td></td>
</tr>
<tr>
<td>Online Room Nights</td>
<td>Sept</td>
<td>Flat</td>
<td></td>
</tr>
</tbody>
</table>
Florida - Pacing and Booking Activity
updated April 6, 2020

Adjusted Paid Occupancy % Pacing

- 2020 as of 4/6/2020
- 2019 as of 4/6/2019
- 2019 Final
THE FUTURE

Trip Purpose: Leisure – Family

[Graph showing trip purpose trends over time for different booking dates and durations]
## THE FUTURE

<table>
<thead>
<tr>
<th>Month</th>
<th>Budgeted Amount</th>
<th>Reduced Amount</th>
<th>Cum Act Rev to Jan 20</th>
<th>Rev Red % - Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan-20</td>
<td>$1,635,593</td>
<td>$1,736,629</td>
<td>$5,044,389</td>
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<tr>
<td>Feb-20</td>
<td>$2,168,681</td>
<td>$542,170</td>
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<td>6%</td>
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<tr>
<td>Mar-20</td>
<td>$1,519,857</td>
<td>$151,986</td>
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<td>75%</td>
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<tr>
<td>Apr-20</td>
<td>$1,362,397</td>
<td>$136,240</td>
<td></td>
<td>90%</td>
</tr>
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<td>$1,362,397</td>
<td>$136,240</td>
<td></td>
<td>90%</td>
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<tr>
<td>Jun-20</td>
<td>$1,551,802</td>
<td>$465,541</td>
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<td>70%</td>
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<td>Jul-20</td>
<td>$1,674,639</td>
<td>$669,856</td>
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<td>60%</td>
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<tr>
<td>Aug-20</td>
<td>$1,244,766</td>
<td>$622,383</td>
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<td>50%</td>
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<tr>
<td>Sep-20</td>
<td>$951,990</td>
<td>$666,393</td>
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<td>30%</td>
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<tr>
<td>Est Actuals</td>
<td>$17,154,114</td>
<td>$10,035,586</td>
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<td>40%</td>
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</tbody>
</table>
The Future

- People will be slow to get back to travel
- Leisure will come back first versus Business
- They will most likely want to drive versus fly
- They may be looking for destinations that are closer to home
- Beach destinations and small towns top consumer’s list for first trips
- Would prefer not to be in crowds/cruises
- Space Coast will be testing the waters with consumers
- Timing for recovery campaign unsure (June?)
THE FUTURE – IS BRIGHT

• The travel industry has bounced back (and thrived) from every major setback in the last 20 years – 9/11, Gulf Wars, Great Recession, hurricanes, end of Shuttle Program

![Graph showing budget increases from FY2015-16 to FY2019-20.](image)
THANK YOU!!!

Q & A