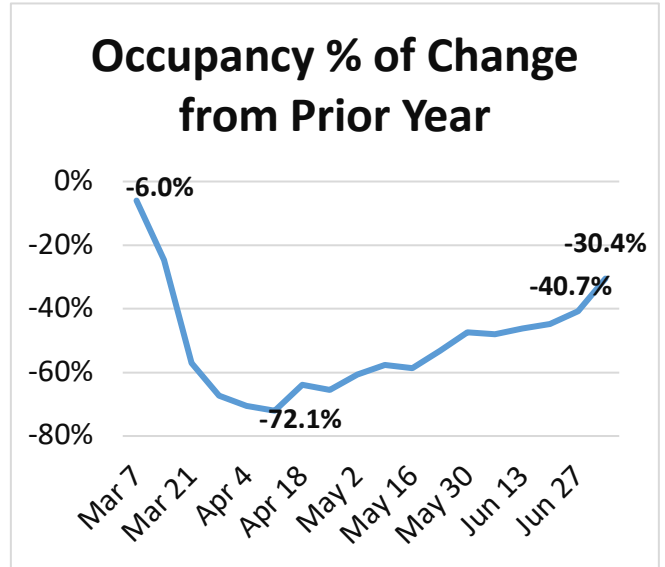
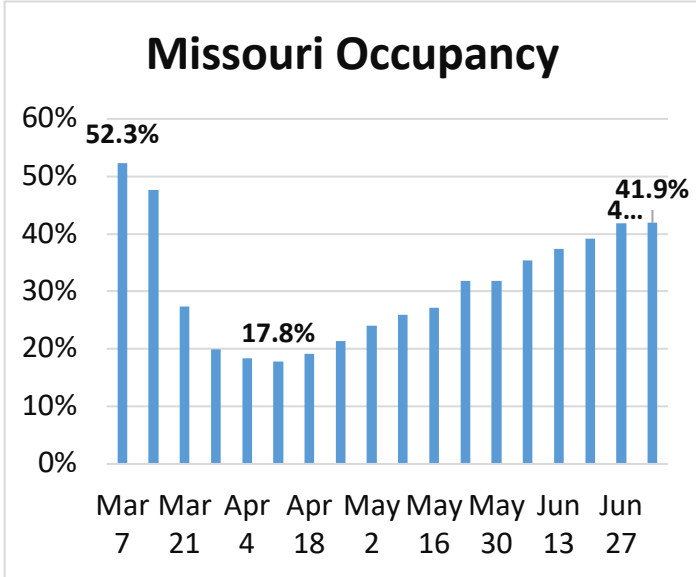


WEEKLY HIGHLIGHTS RESEARCH REPORT

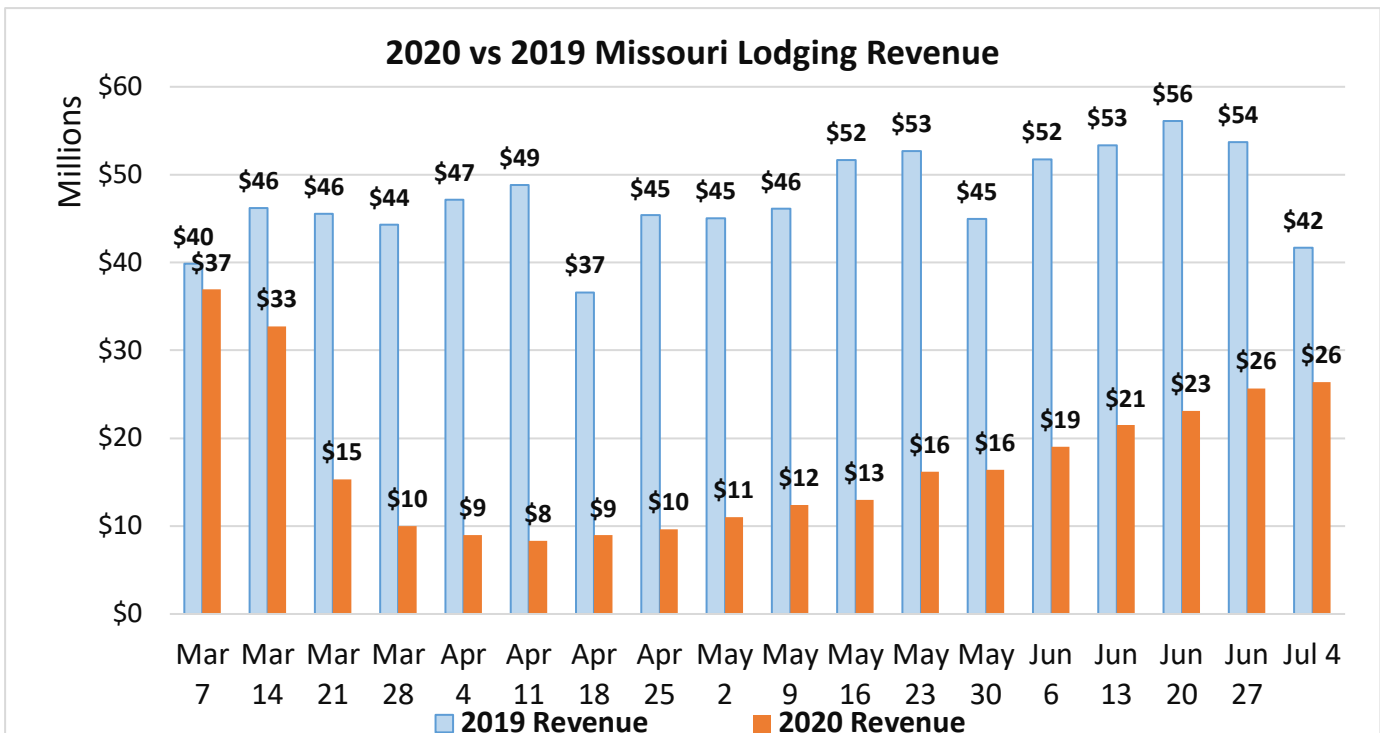
July 10, 2020

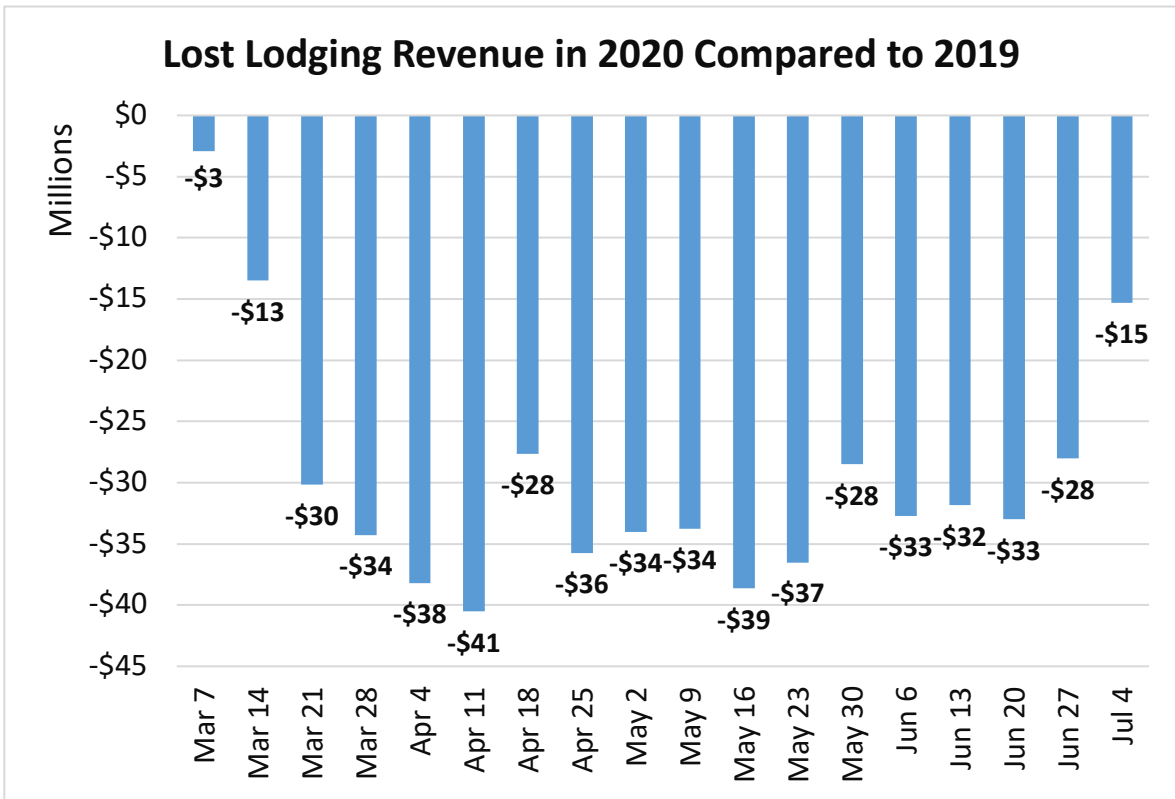
STR Lodging Data: (Source: STR Lodging Data)

- Occupancy statewide is only 41.9 % for week ending June 27th but that is up from last week's 41.8% occupancy. Additionally, the percent of occupancy change over last year looks better this week (-30.4% this week versus a -40.7% decrease last week).
- Cumulatively, revenue from the Missouri lodging industry is down - \$506.8 million for March - June compared to the same period last year. *For more information, please see slides below*



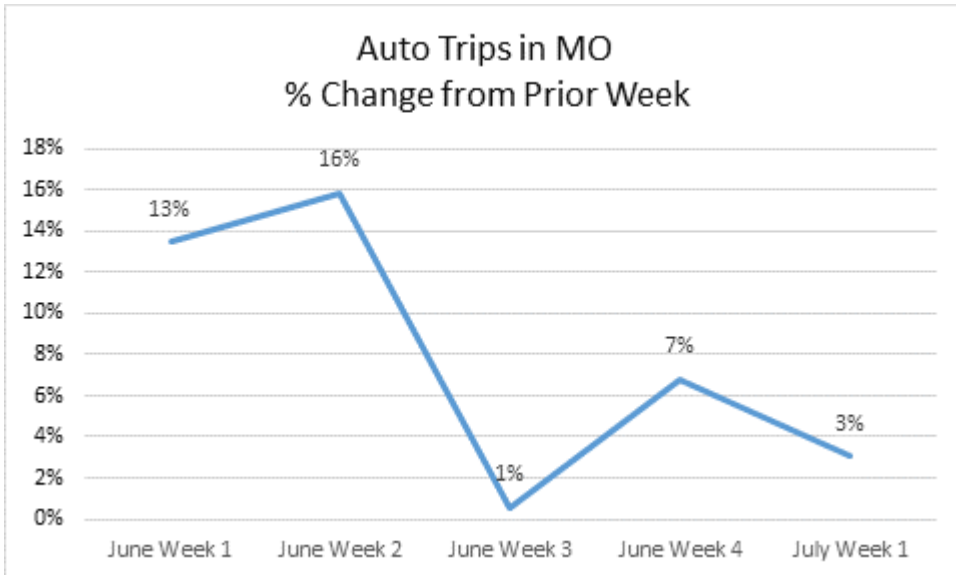
Lost Lodging Revenue in Missouri Totals \$506.8 Million during March - June





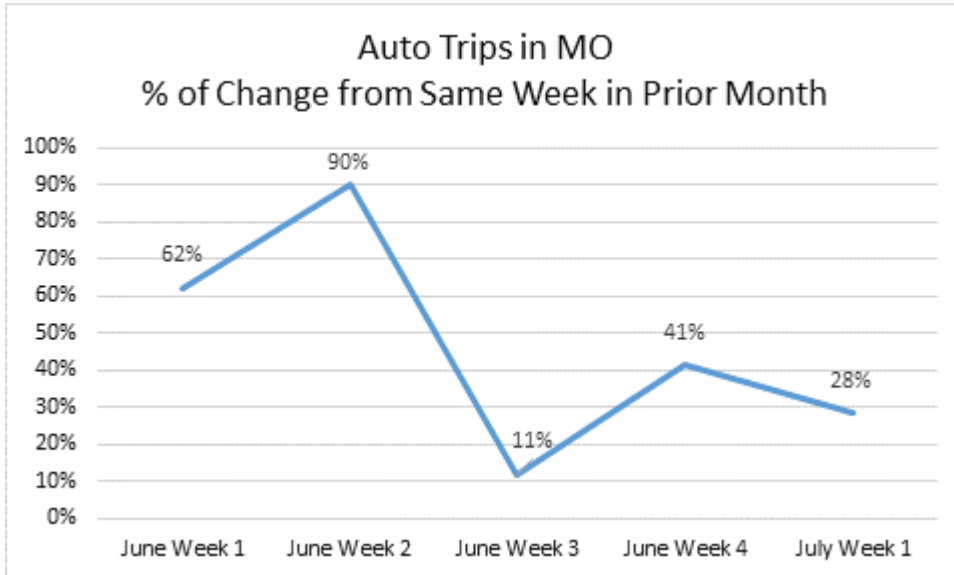
Attribution findings for Travelers to Missouri – Arrivalist

Daily drive trips of US travelers who moved at least 50 miles from home and spent a minimum of 2 hours in Missouri. In the first week of July (thru July 4th) total road trips in Missouri increased by 3% over the fourth week of June.

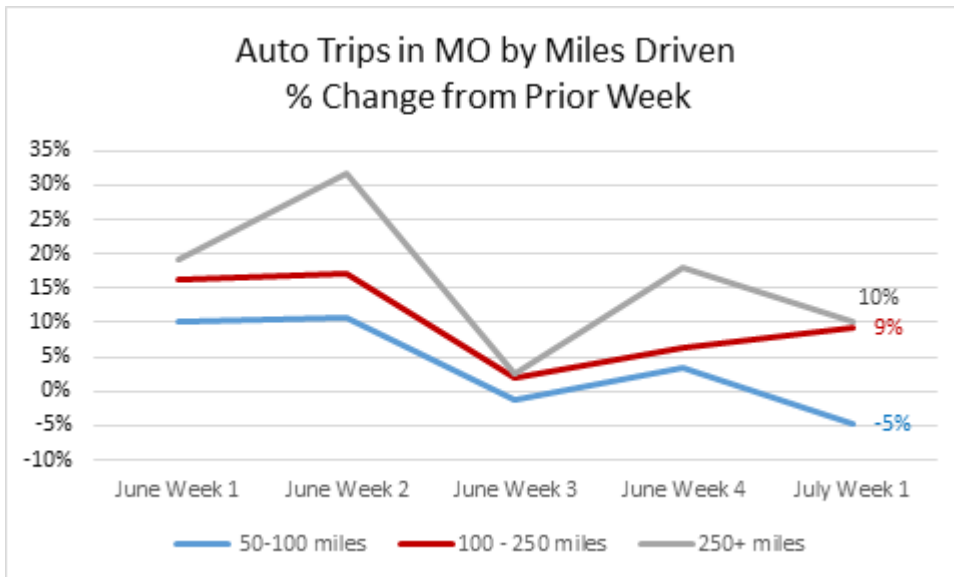


Arrivalist (Cont.)

When compared to the first week of June, total road trips for the first week of July were up 28%.

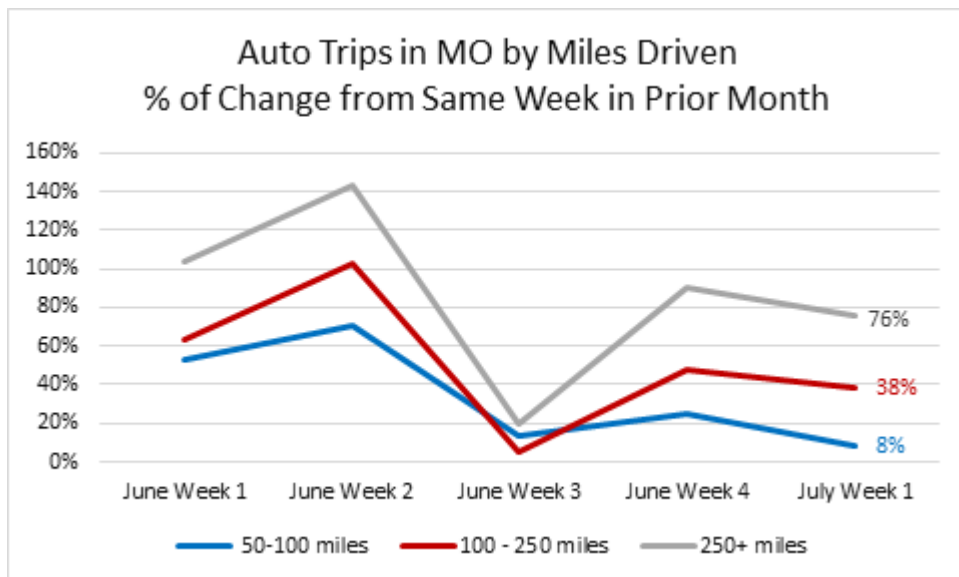


When we look at the road trips broken down by distance driven during the first week of July, longer road trips increased by 9 to 10%, while road trips of 50-100 miles decreased by 5%.



Arrivalist (Cont.)

When comparing the first week of July versus the first week of June for distance driven on road trips, trips of 250+ miles were up considerably with a 76% increase, trips of 100 to 250 miles were up 38%, and trips of 50 to 100 miles were up only 8% in comparison.



DESTINATION ANALYSTS

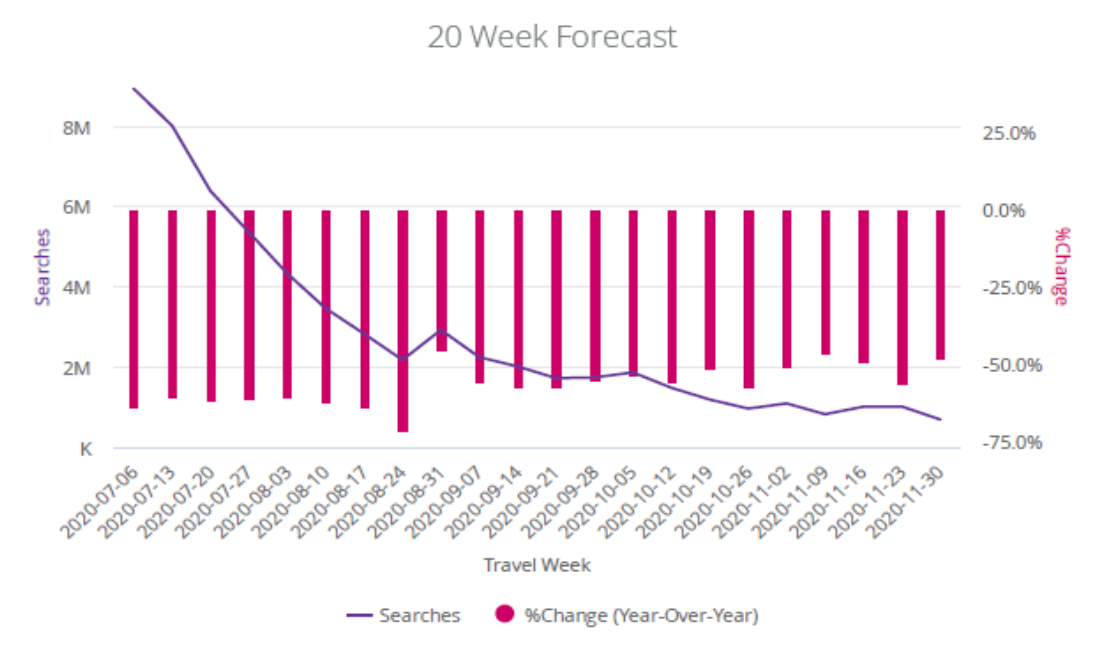
More than twice as many Americans took trips for the Fourth of July compared to Memorial Day, and those who did skewed younger, male, city dwellers with higher household incomes—offering some clues to travel's near-term future.

- 63.0% of American travelers feel the pandemic is going to get worse in the US in the next month—up dramatically from 34.7% at the beginning of June.
- Americans reported ability to be inspired to travel in the next three months—even under attractive conditions—has declined with the worsening of the pandemic.
- The percent of Americans saying there are certain destinations they would normally consider visiting but now will absolutely not jumped to 37.3% from 29.6% in just one week.
- When asked what's driving the avoidance of these destinations, rising coronavirus cases and the perceived unsatisfactory management of the situation, as well as the expected poor behavior of other tourists was most cited.
- 16.5% took a trip for the Fourth of July holiday, more than double Memorial Day.
- Americans who already have a destination(s) in mind for their 2020 leisure travel plans continue to show an affinity for beaches.

The hotel operational practices that would make Americans feel most confident that their health is being looked after is employees wearing masks and gloves, well-explained cleaning procedures, enforced social distancing and being provided with sanitizer and masks. [Full Report Here](#)

ADARA Booking and Searches for Missouri

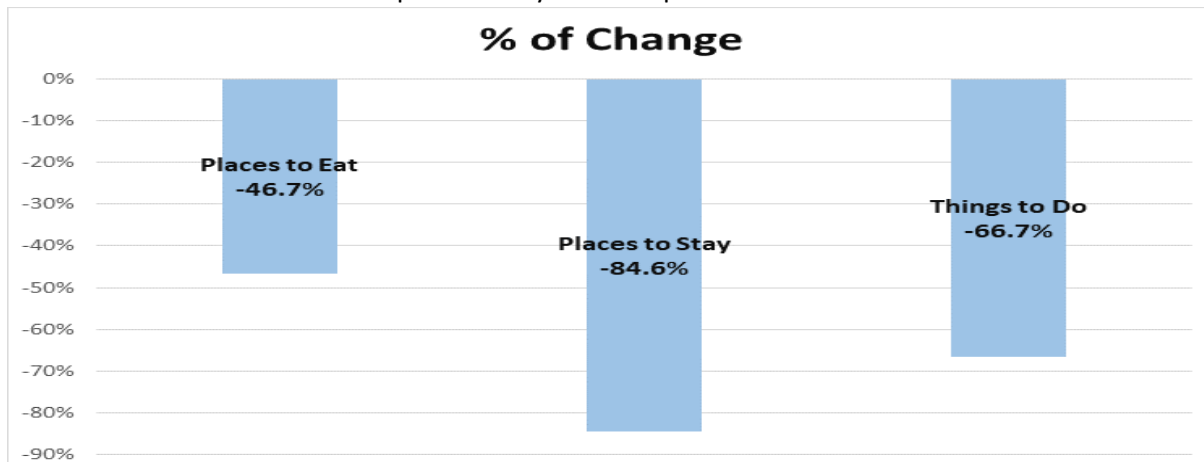
- For the week of 6/22, data continued to show a national decrease in bookings and searches week over week in most states. **THEN WE RECEIVED THE WEEK ENDING JULY 4TH DATA**
- For the first time in more than 8 weeks, there wasn't a single state that was up in bookings or searches week over week across our data co-op partners. 42 states managed to be up in YOY% change for forecasted searches but 8 states were down across all three statistical categories.



APRIL NAICS Sales Revenue (Source: Mo Dept. of Revenue)

The North American Industry Code System (NAICS) is the coding system whereby businesses' sales are tracked by the type of business they are. Missouri began seeing major declines in revenue in March and the April (below) declines further.

- PLACES TO EAT: April Down - 46.7% compared to - 32.3 % in March
- PLACES TO STAY: April Down - 84.6% compared to - 54.6 % in March
- THINGS TO DO: April Down – 66.7% compared to - 51.1% in March
- ATTRACTIONS & RECREATION: April Down by 74% compared to - 45.1% in March



MO Tourism Economic Impact Losses through June 27

Source: *Tourism Economics-an Oxford Economics Company*

Feb 29 thru July 4th: \$3.6 Billion Loss in year-over-year travel spending

MO Tourism Economic Impact

TOTAL WEEKLY TRAVEL SPENDING (\$ MILLIONS)

WEEK ENDING...	29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	4-Apr	11-Apr	18-Apr	25-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul
Missouri Jul 4 #s	272	283	208	95	62	50	45	43	38	43	48	48	81	118	134	148	156	171	203

YEAR-OVER-YEAR NET CHANGE IN WEEKLY TRAVEL SPENDING (\$ MILLIONS)

WEEK ENDING...	29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	4-Apr	11-Apr	18-Apr	25-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul
Missouri Jul 4 #s	-15	-20	-96	-209	-242	-256	-262	-264	-269	-263	-259	-259	-226	-189	-190	-177	-169	-154	-119

\$3.6 Billion Loss

YEAR-OVER-YEAR % CHANGE IN WEEKLY TRAVEL SPENDING

WEEK ENDING...	29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	4-Apr	11-Apr	18-Apr	25-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul
Missouri Jul 4 #s	-5%	-7%	-31%	-69%	-80%	-84%	-85%	-86%	-88%	-86%	-84%	-84%	-74%	-62%	-59%	-54%	-52%	-47%	-37%

Source: *Tourism Economics-an Oxford Economics Company*