

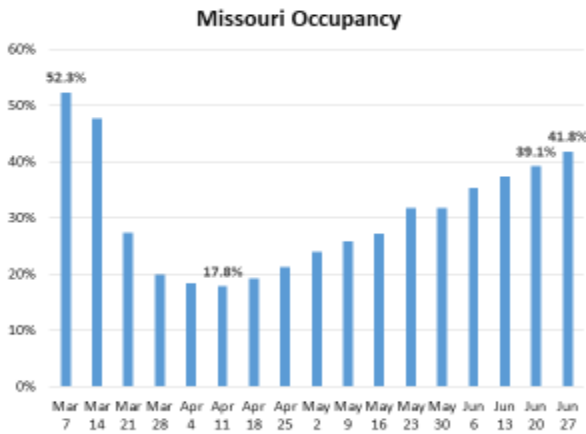
WEEKLY HIGHLIGHTS RESEARCH REPORT

July 2, 2020

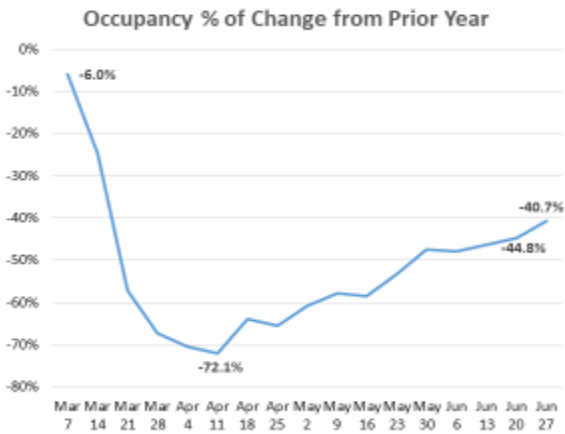
STR Lodging Data: (Source: STR Lodging Data)

- Occupancy statewide is only 41.8 % for week ending June 27th but that is up from last week's 39.1% occupancy. Additionally, the percent of occupancy change over last year looks better this week (-40.7% this week versus a -44.8% decrease last week).
- Cumulatively, revenue from the Missouri lodging industry is down - \$491.5 million March - June compared to the same period last year. *For more information, please see slides below*

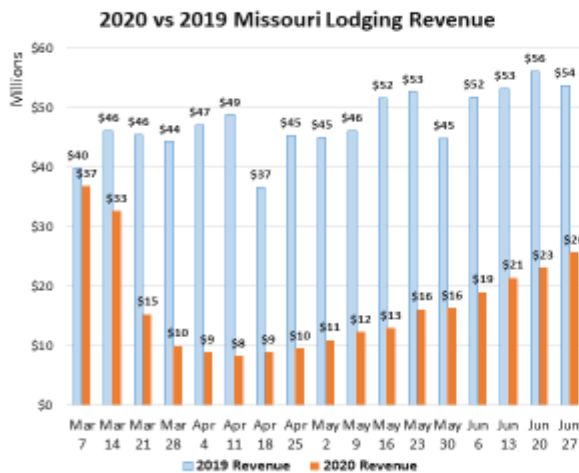
STR Lodging Weekly Data for Missouri Statewide Occupancy



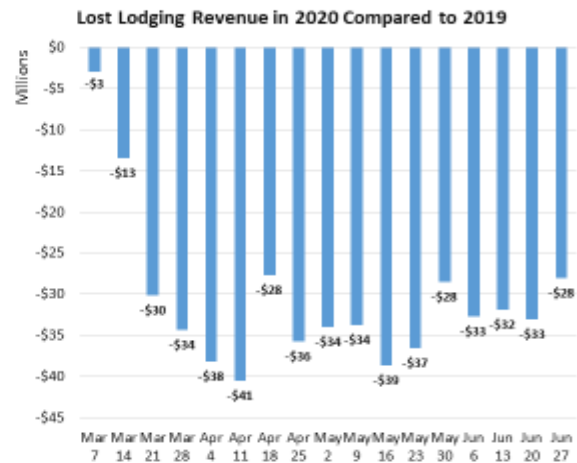
Source: STR Lodging Data



Lost Lodging Revenue in Missouri Totals \$491.5 Million during March - June



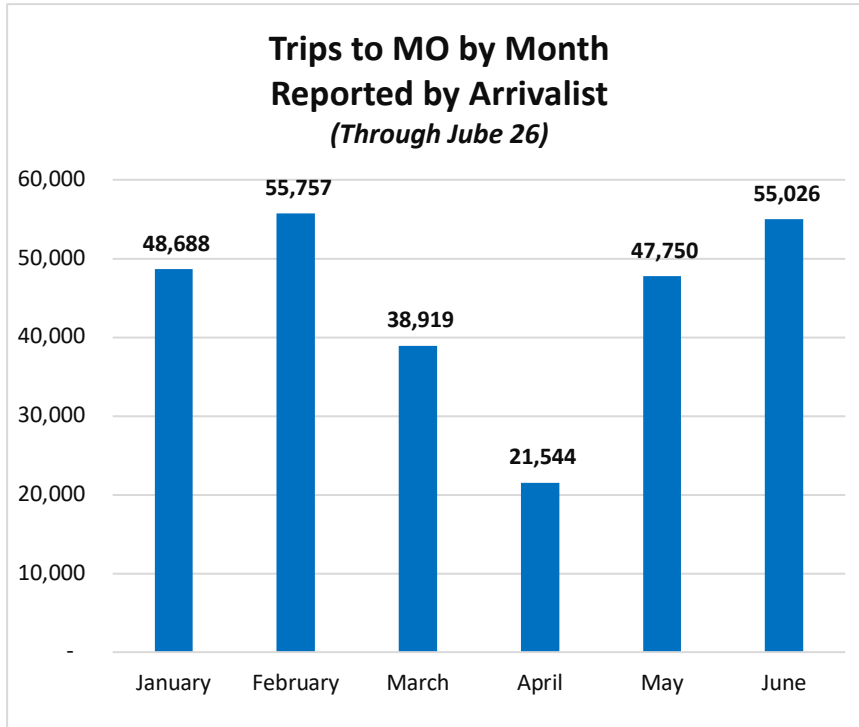
Source: STR Lodging Data



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.

- Number of visitors by state month-over-month (January thru June) indicates a large number of Missourians (136,488) are moving around the state
- At least 218,996 travelers have been visiting Missouri Feb. through June 26. Up from last week's total - 206,784.



Missouri & Contiguous States	Total Trips
Missouri	136,488
Illinois	26,359
Kansas	16,360
Arkansas	9,096
Iowa	7,536
Oklahoma	4,220
Nebraska	3,144
Tennessee	1,598
Kentucky	1,021

States with at Least 30 Visitors—Through June 26						
MO	136,488		KY	1,021	NC	158
IL	26,359		MN	1,006	AZ	152
KS	16,360		OH	776	NY	132
AR	9,096		MS	614	NM	110
IA	7,536		LA	509	VA	96
OK	4,220		CO	446	SC	86
NE	3,144		FL	369	ND	75
TX	2,796		GA	343	MD	47
IN	2,084		AL	278	WY	41
TN	1,598		SD	248	NJ	36
WI	1,100		PA	170	WV	35
MI	1,097		CA	161	UT	34

Tourism Industry Unemployment from Missouri Department of Labor)

We've had a change in the data provided by DOLIR and because of the changes, the numbers have decreased. This adjustment is necessary due to the fact that an individual can have more than one initial claim, so the initial claim count does not directly correlate with people unemployed. The new data reflects DOLIR's work to reduce duplicate counts as well as now excludes pending claims. This is an important distinction as the total numbers appear to have decreased. For reference, during the period 3/15-6/20, the total tourism unemployment claims was previously 119k and is 81k for the same period after the data change.

	Total Claims 3/15-6/27	% of Total Claims	% of Claims with a Known Industry
Tourism Accommodations	12,940	1.5%	3.2%
Tourism Attractions	5,034	0.6%	1.3%
Tourism Entertainment	3,449	0.4%	0.9%
Tourism Food Services	58,263	6.8%	14.6%
Tourism Other NAICS	2,571	0.3%	0.6%
Tourism Total (All 45 NAICS)	82,257	9.5%	20.6%

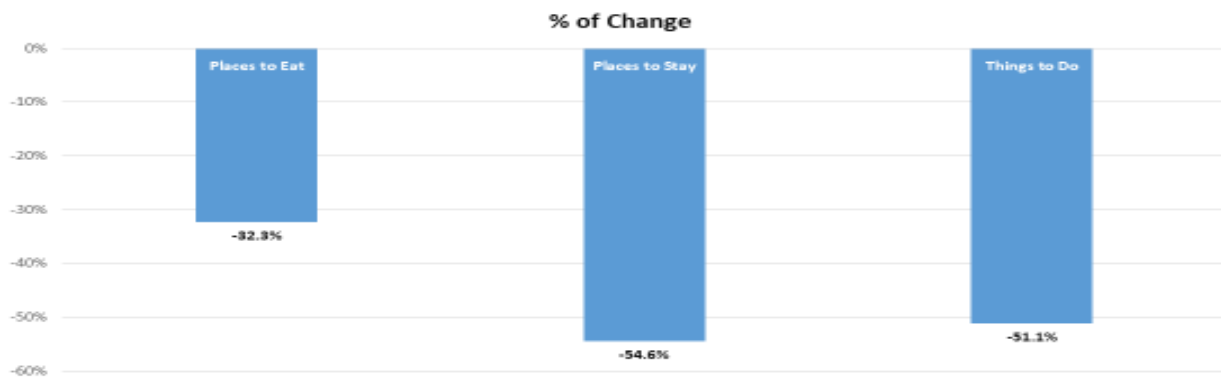
Source: Missouri Department of Labor and Industrial Relations, Initial Unemployment Claims

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

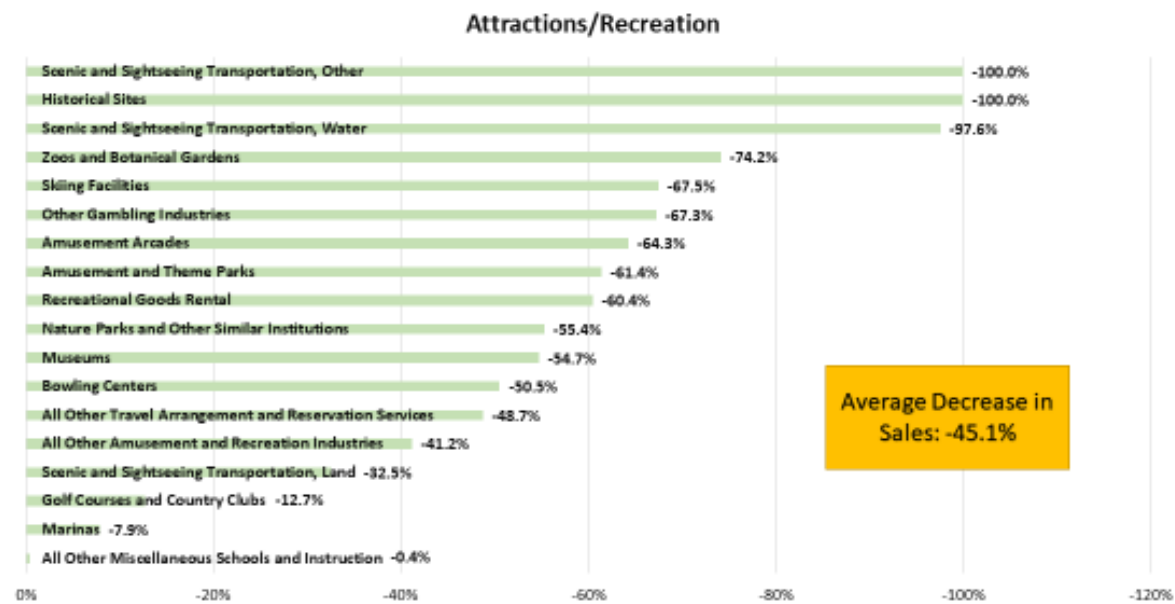
The North American Industry Code System (NAICS) is the coding system whereby businesses' sales are tracked by the type of business they are. March was the first month in 2020 where Missouri began seeing major declines in revenue. April data is not yet available.

- PLACES TO EAT: Down a - 32.3%
- PLACES TO STAY: Down a - 54.6%
- THINGS TO DO: Down a - 51.1%
- ATTRACTIONS & RECREATION: Down by 45.1%

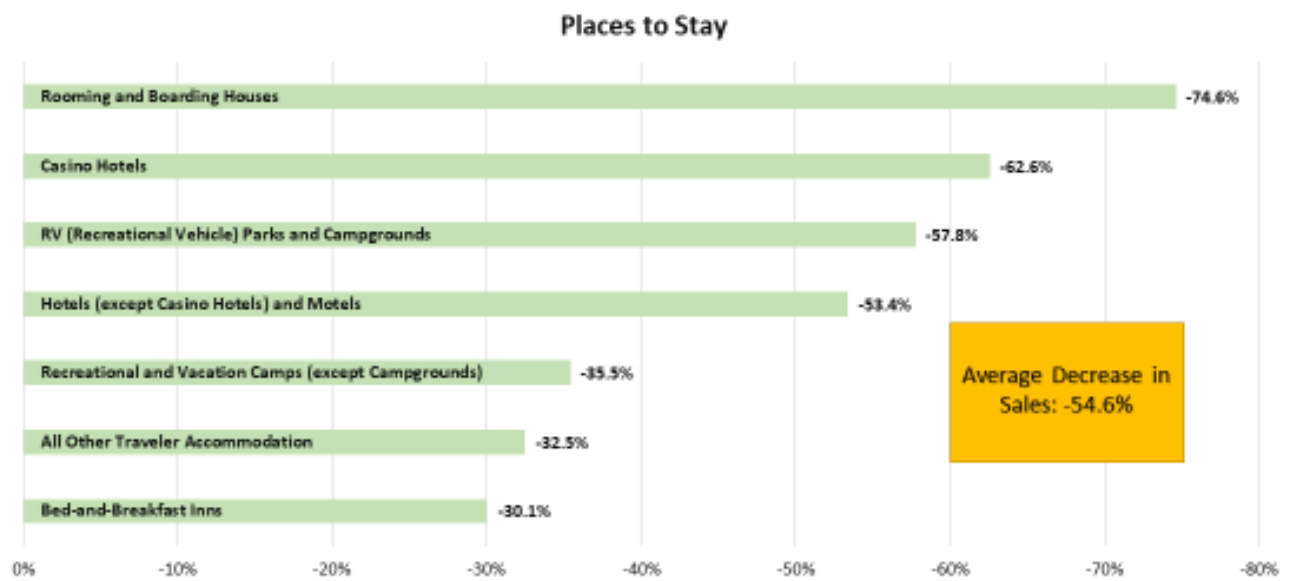
Tourism-Related NAICS Sales Revenue Change in March 2020 Compared to March 2019



Change in Sales Revenue in March 2020 vs March 2019



Change in Sales Revenue in March 2020 vs March 2019



MO Tourism Economic Impact

TOTAL WEEKLY TRAVEL SPENDING (\$ MILLIONS)

WEEK ENDING...	22-Feb	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
Missouri Jun 20 #s	291	272	283	208	95	62	50	45	43	38	43	48	48	81	118	134	148	156

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

WEEK ENDING...	22-Feb	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
Missouri Jun 20 #s	4	-15	-20	-96	-209	-242	-256	-262	-264	-269	-263	-259	-259	-226	-189	-190	-177	-169

-\$3.4 Billion

YEAR-OVER-YEAR % CHANGE IN WEEKLY TRAVEL SPENDING

WEEK ENDING...	22-Feb	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
Missouri Jun 20 #s	2%	-5%	-7%	-31%	-69%	-80%	-84%	-85%	-86%	-88%	-86%	-84%	-84%	-74%	-62%	-59%	-54%	-52%

Source: Tourism Economics-an Oxford Economics Company

COVID-19 travel on attractions update rebuild addition survey results wave to week of June 22

This research from H2r (Jerry Henry) looks at that the “News of COVID-19 cases surging across the U.S. appears to have dampened consumer travel intentions” and their confidence in it being OK to travel.”

Here are some of the findings with the full study attached:

- Consumers are far less likely to feel safe traveling outside of their community compared to early June (-17 points).
- Intent to travel this summer (-9 points), any time in 2020 (-9 points) and any time in 2021 (-11 points) have all declined since Wave 1.
- And among those likely to take a leisure trip, the average distance willing to travel dropped 100 miles, as those likely to travel 300 miles or more fell nine points.
- Average intent to visit attractions also fell (-5 points).
- Only 28% now support the idea of opening up their community to visitors from other parts of the country (-13 points from Wave 1) while only one-quarter still feel safe doing so (-15 points) Down from Wave 1.
- Guests to attractions are far less satisfied with the governance changes and felt much less safe/confident relative to their expectations. And as a result, [H2R's COVID Confidence Index](#) dipped to 38.4 from 51.9.

[**Click here for the full report**](#)