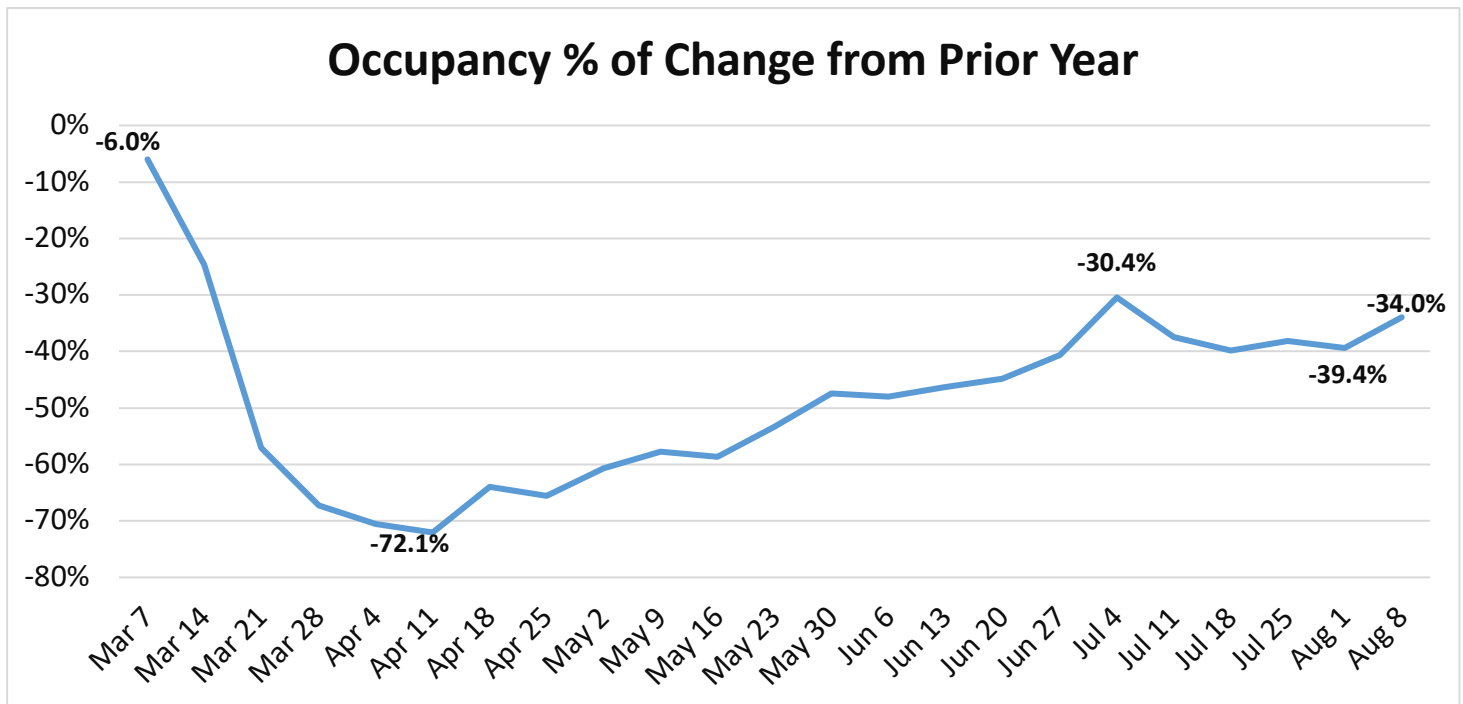
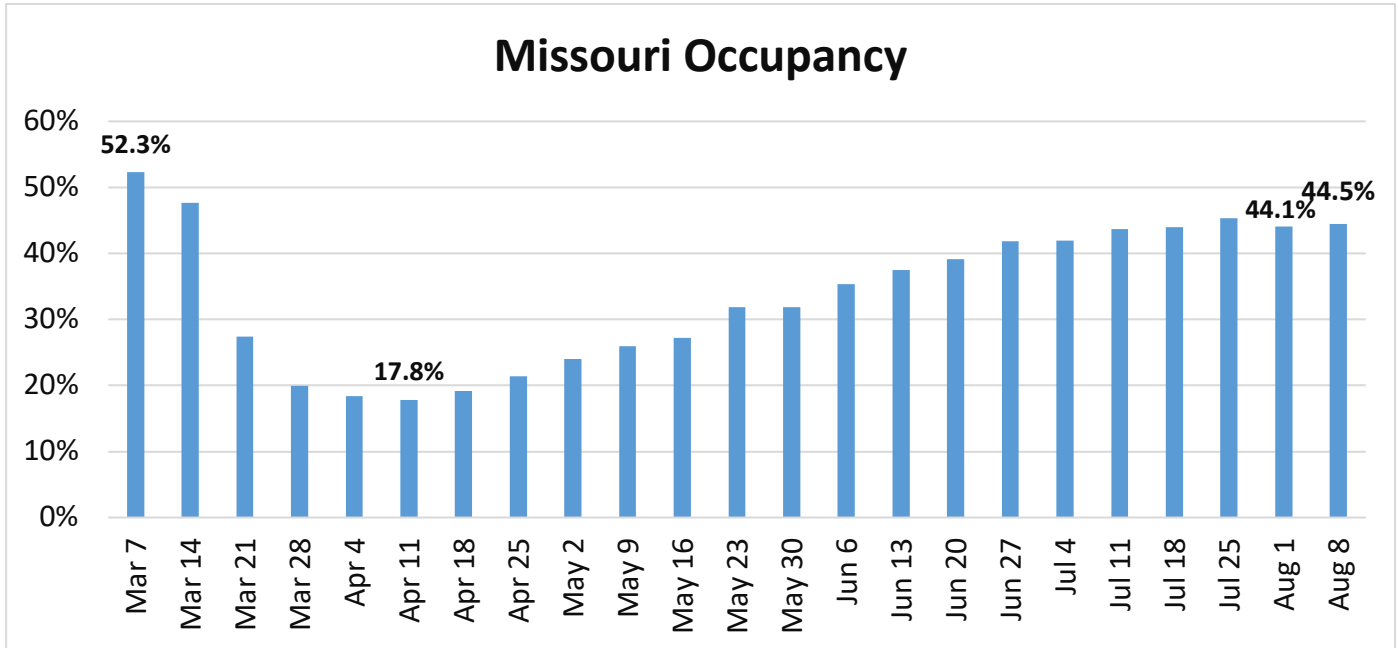


WEEKLY RESEARCH HIGHLIGHTS REPORT

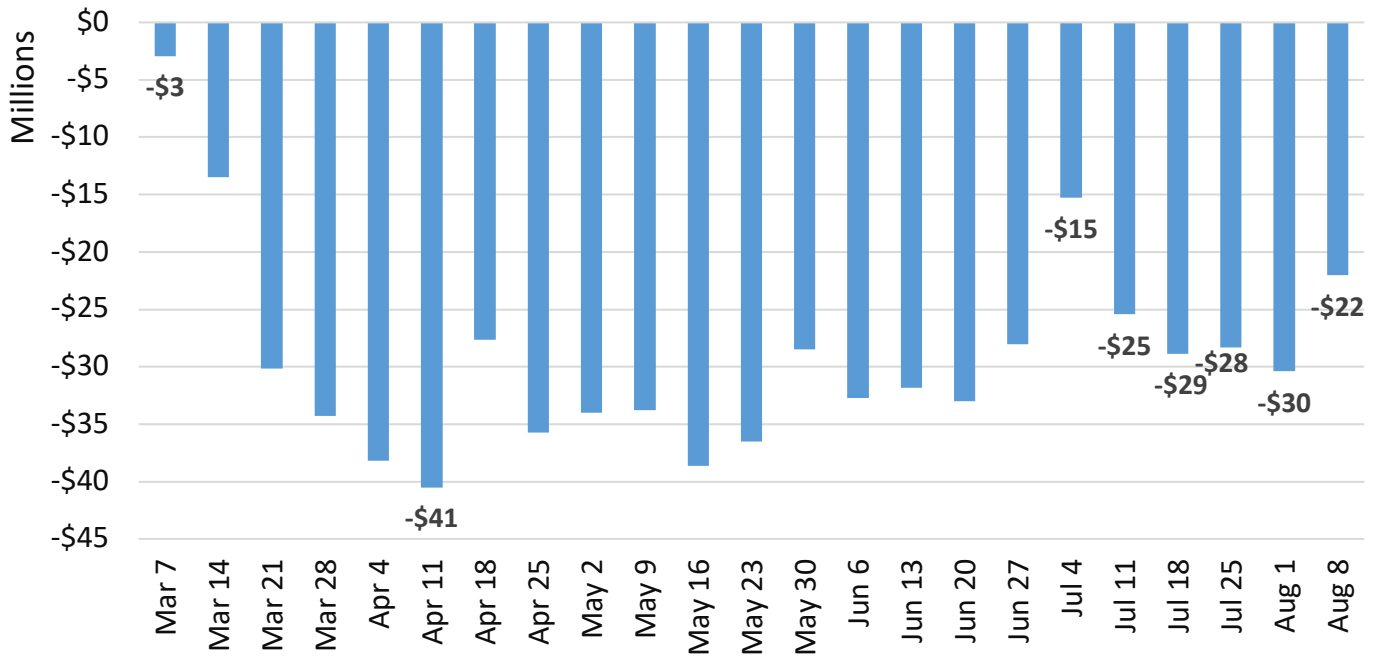
August 14, 2020

STR Lodging Data: *(Source: STR Lodging Data)*

- Occupancy statewide is only 44.5 % for week ending August 8th- up from last week's 44.1% occupancy. The occupancy change over last year for this same week is -34% versus a -39.4% decrease last week.
- Cumulatively, revenue from the Missouri lodging industry is down - \$641.8 million for March – Aug 8 compared to the same period last year. *For more trending information, please see slides below*



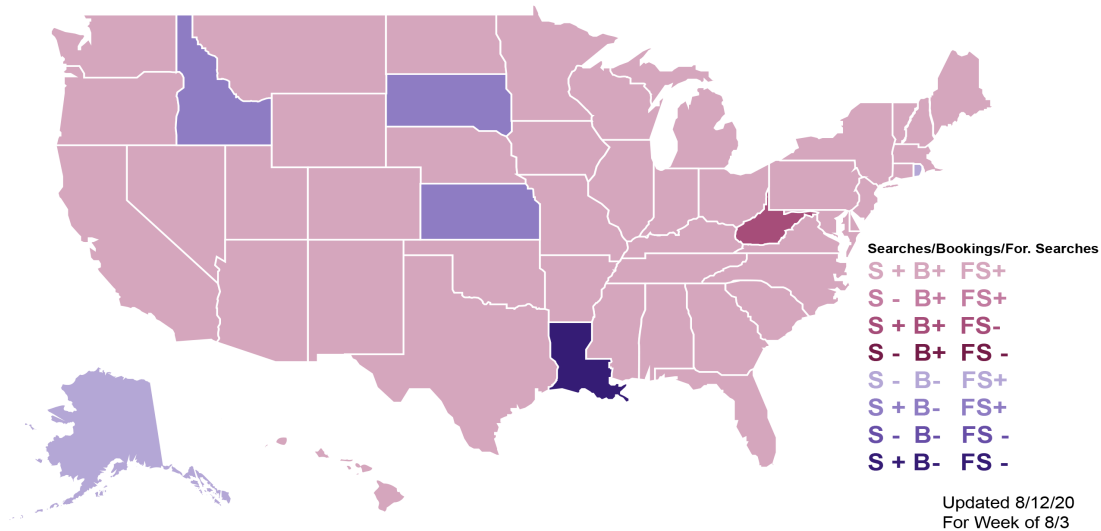
Lost Lodging Revenue in 2020 Compared to 2019



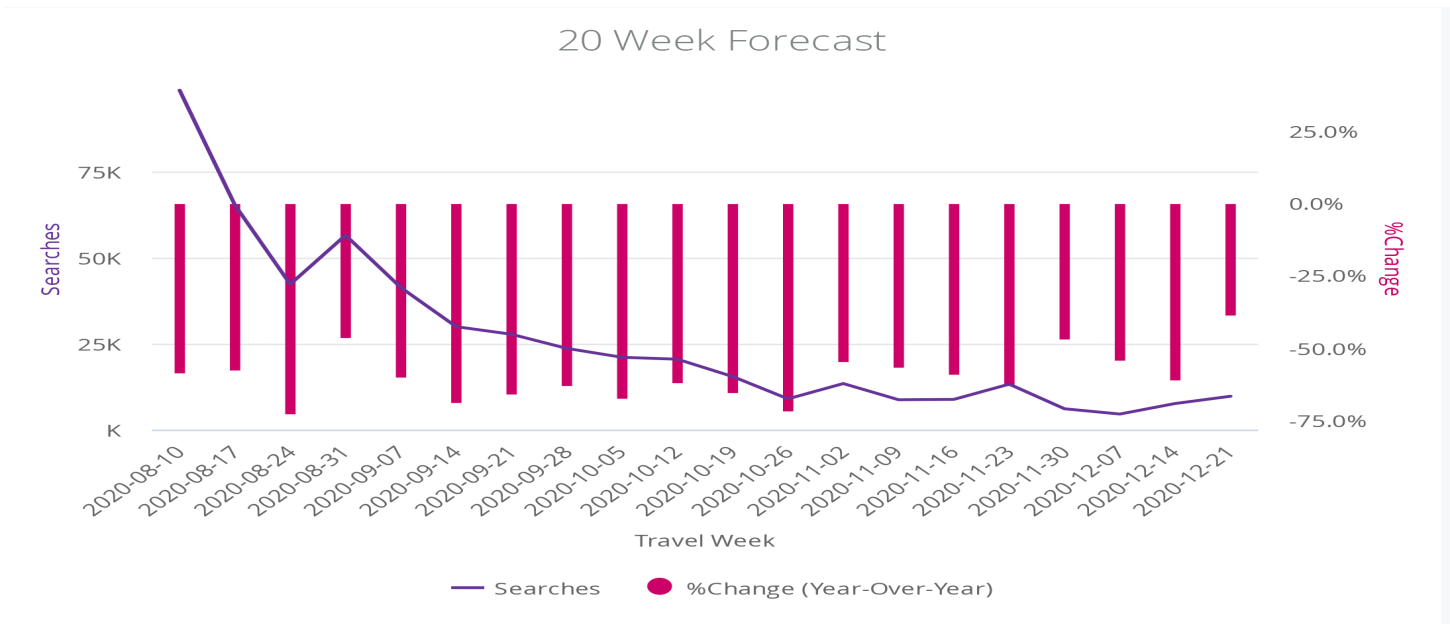
BOOKING DATA (Source: ADARA)

- For the week of 8/3, Missouri is one of 43 states that were up, to varying degrees, across searches, bookings and forecasted searches (which now reach out to the week of Christmas).
- Searches were up 3,400 to 56,820 which is -60% YoY compared to 2019. National searches are down 66%.
- Bookings were up 517 to 6,660 which is -67% YoY compared to 2019. National bookings are down 69% from this week last year. For comparison purposes, WY and MT are both leading the way at just -9% YoY difference.
- Forecasted searches improved 22% from 12/14-12/21.

COVID-19 Data Week Over Week Searches, Bookings & Forecasted Searches Across ADARA Partners



BOOKING DATA - ADARA (Cont.)



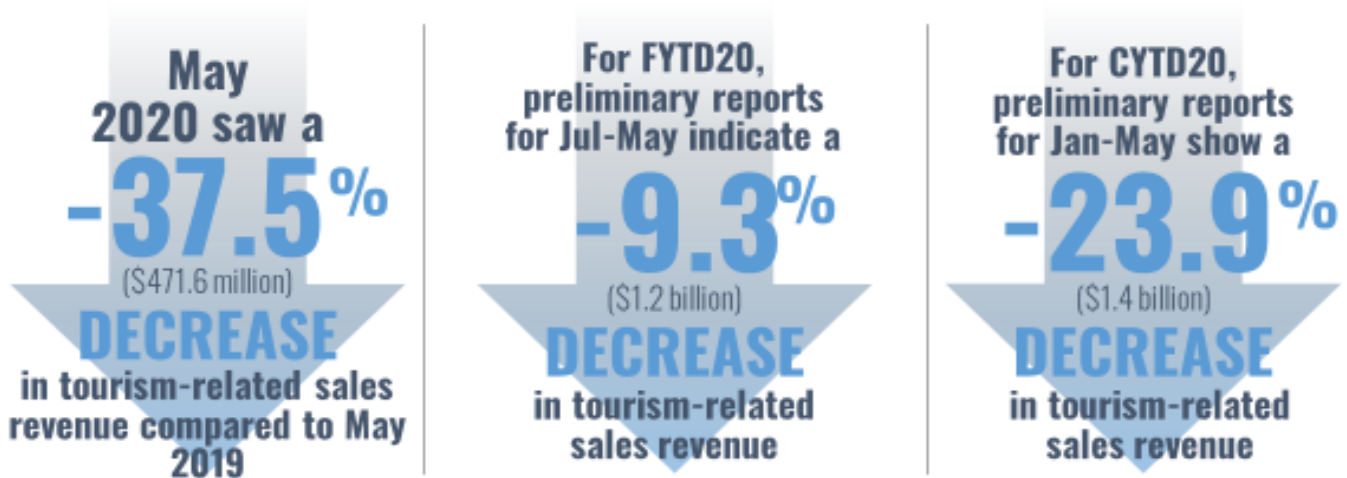
NAICS REPORTING (Source: Missouri Department of Revenue)

45 Tourism North American Industry Codes

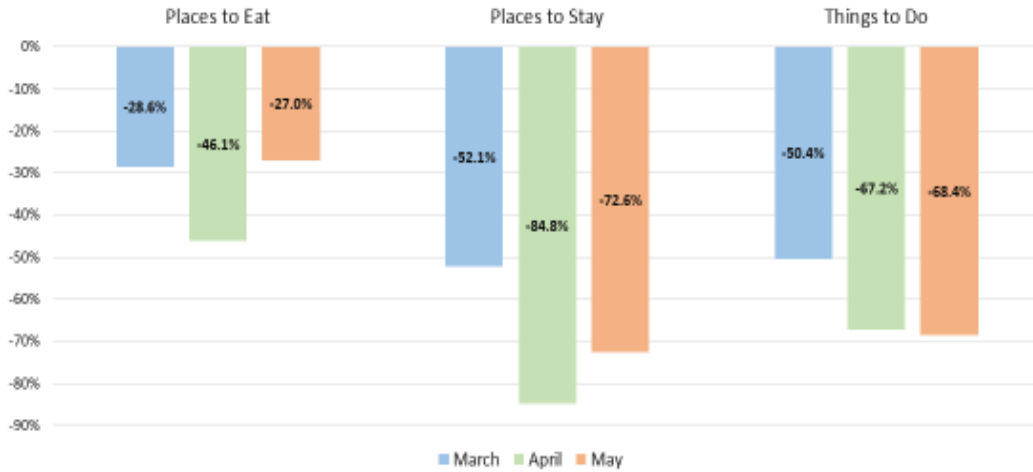


NAICS codes fluctuate by month and by season even in a normal year.

NAICS Tourism Business Sales through May 2020



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

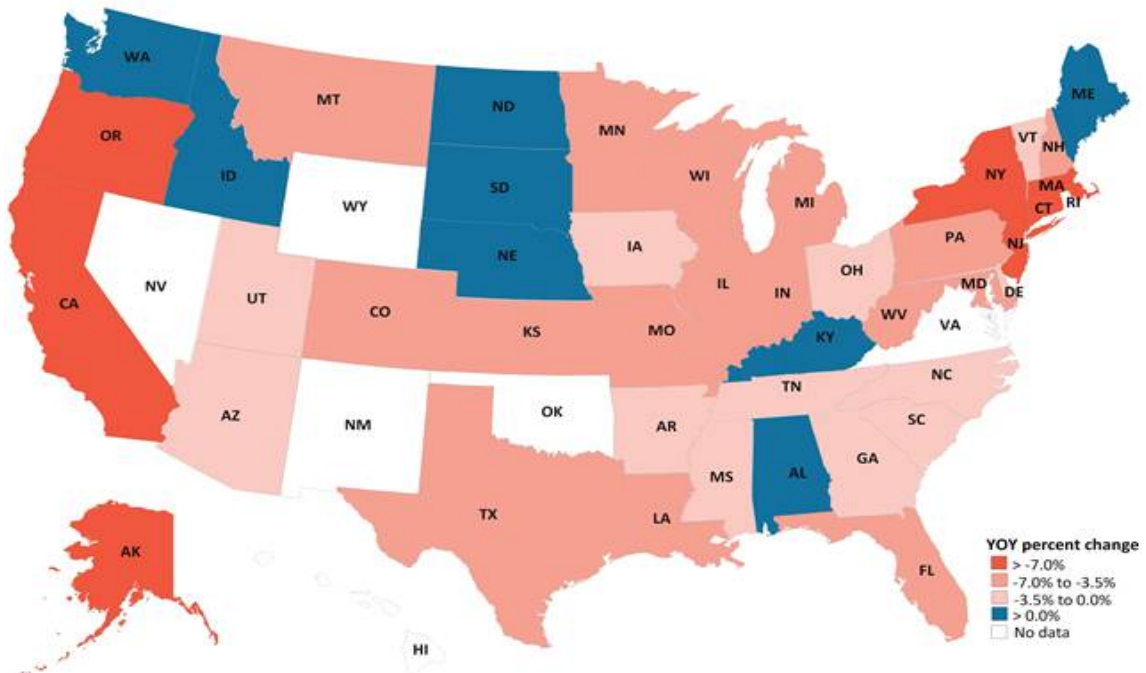


TAX REVENUE COLLECTIONS COMPARED TO OTHER STATES *(Source: Urban Institute and Brookings Institution)*

The **Tax Policy Center** is a joint venture of the **Urban Institute** and **Brookings Institution**. It is made up of nationally recognized experts in **tax**, **budget**, and **social policy** who have served at the highest levels of government. The **Tax Policy Center** is a joint venture of the **Urban Institute** and **Brookings Institution**.

You can gain direct access to monthly, quarterly, and annual 50-state detailed tax revenue databases in [here](#).

Percent Change in State Fiscal Year-to-Date Tax Revenues
July 2019 through June 2020, year-over-year percent change



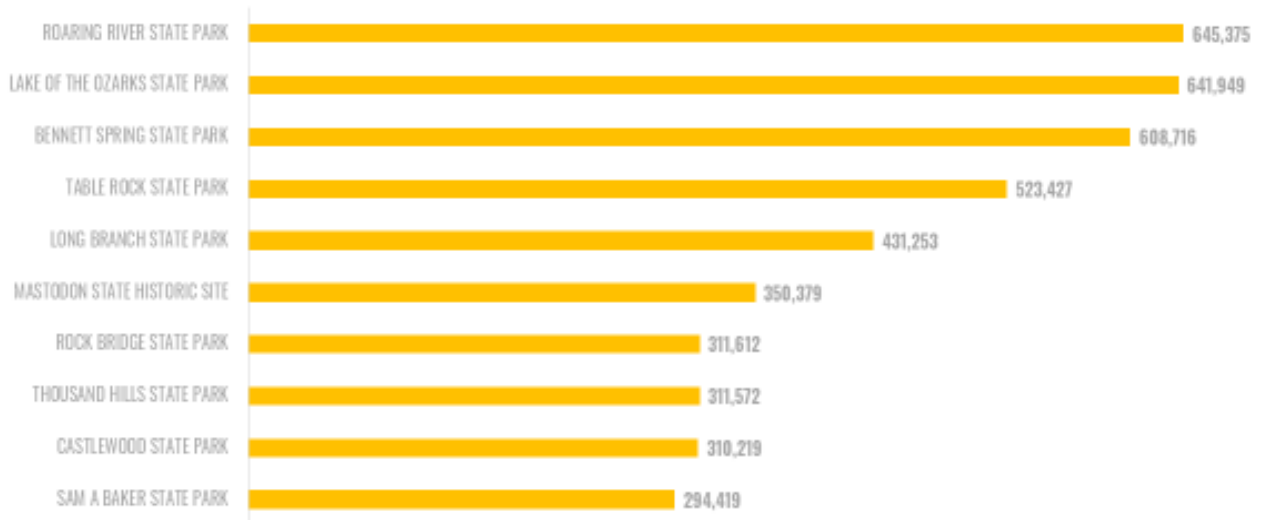
Missouri State Parks Traveler/Attendance (Source: MO State Parks Division)

TOTAL VISITOR numbers for Jan – June CY2020 compared to the same time frame in CY2019: **2019 8,450,186 Visitors vs. 2020 9,334,066 Visitors.** It's important to note that camping and lodging were closed due to COVID-19 from 3/27 to 5/18 and they offered limited Occupancy from 5/18 through the end of June. They are also requiring reservations through 10/31.

State Parks Visitation—Top Ten



Most Visited Missouri State Parks during January - June



MO Tourism Economic Impact Losses
Feb 29 thru Aug 8
\$4.4 Billion Loss in Year-Over-Year Travel Spending

MO TOURISM INDUSTRY ECONOMIC IMPACT

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	11-Jul	18-Jul	25-Jul	1-Aug	8-Aug
Aug 8 #s	-15	-20	-96	-209	-242	-256	-262	-264	-269	-263	-259	-259	-226	-189	-190	-177	-169	-154	-119	-144	-149	-145	-147	-129

YEAR-OVER-YEAR WEEKLY LOSSES IN 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	11-Jul	18-Jul	25-Jul	1-Aug	8-Aug
Aug 8 #s	-5%	-7%	-31%	-69%	-80%	-84%	-85%	-86%	-88%	-86%	-84%	-84%	-74%	-62%	-59%	-54%	-52%	-47%	-37%	-45%	-46%	-45%	-47%	-41%

(Source: Tourism Economics, an Oxford Economics Company)