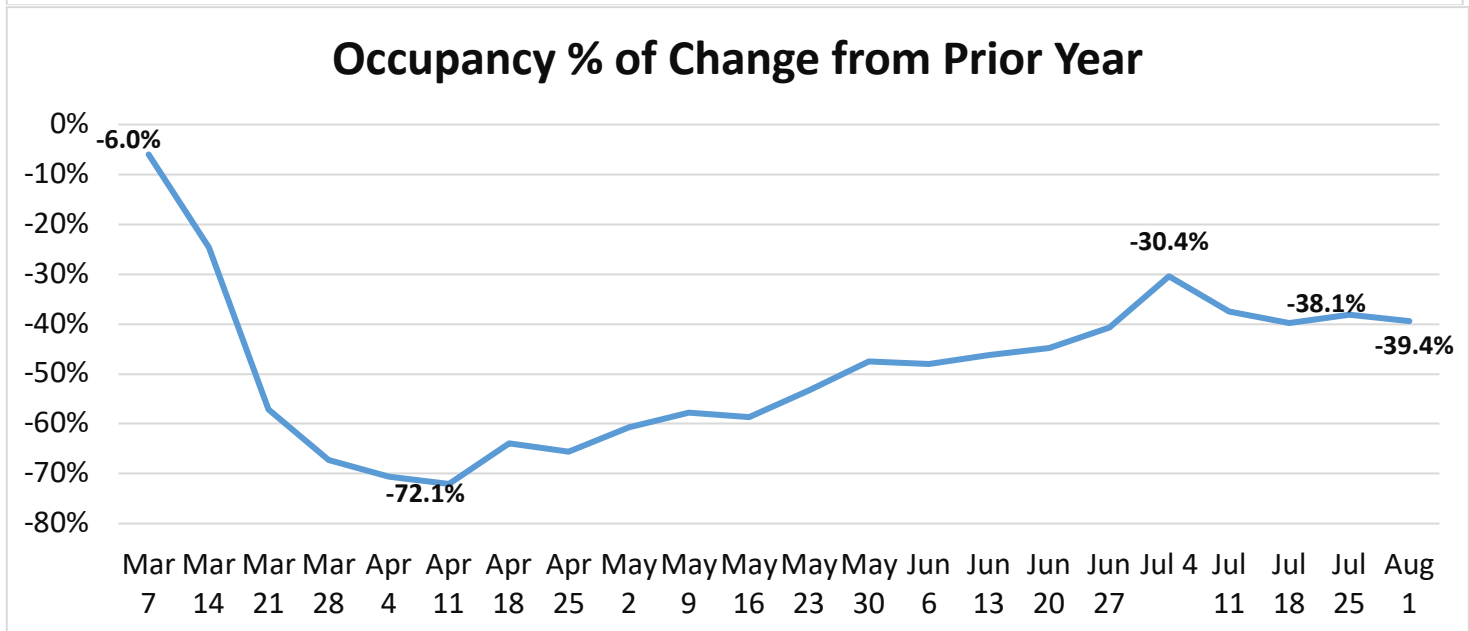
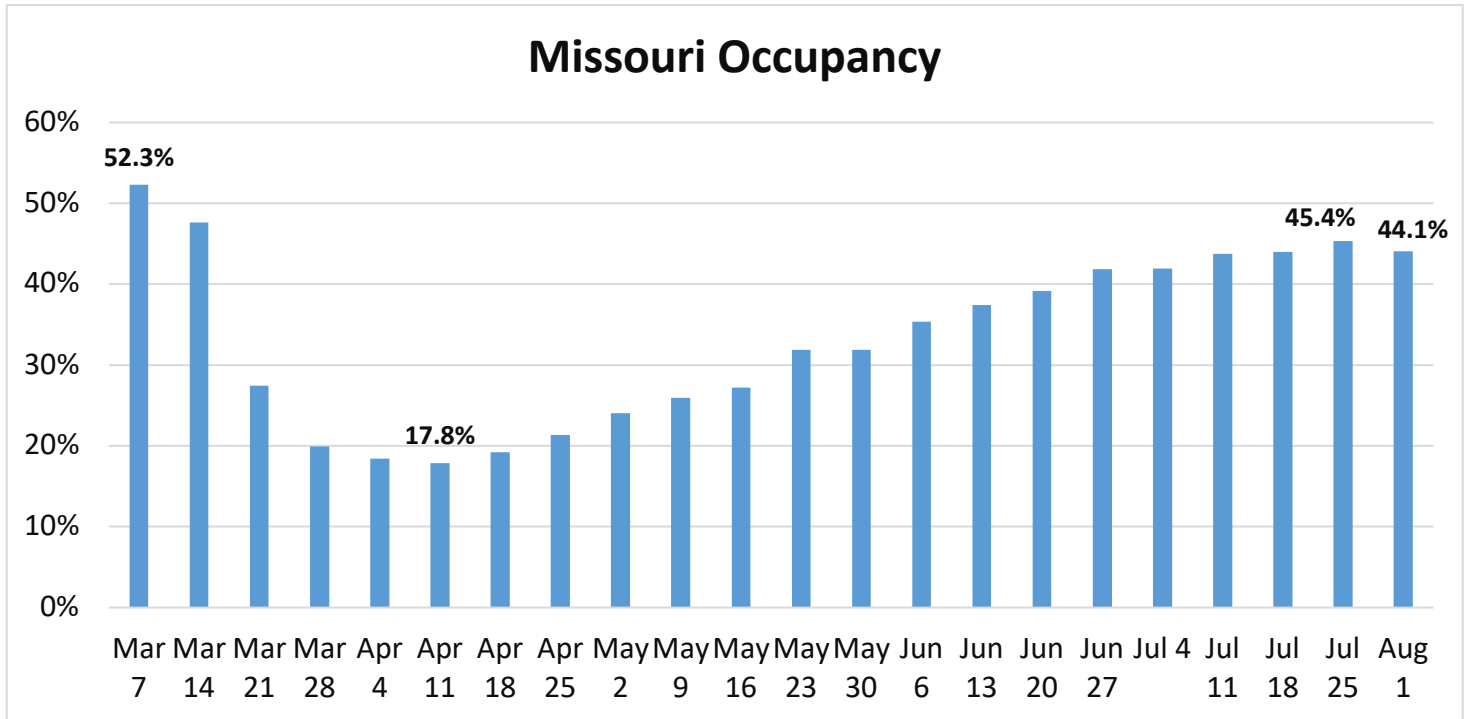


WEEKLY RESEARCH HIGHLIGHTS REPORT

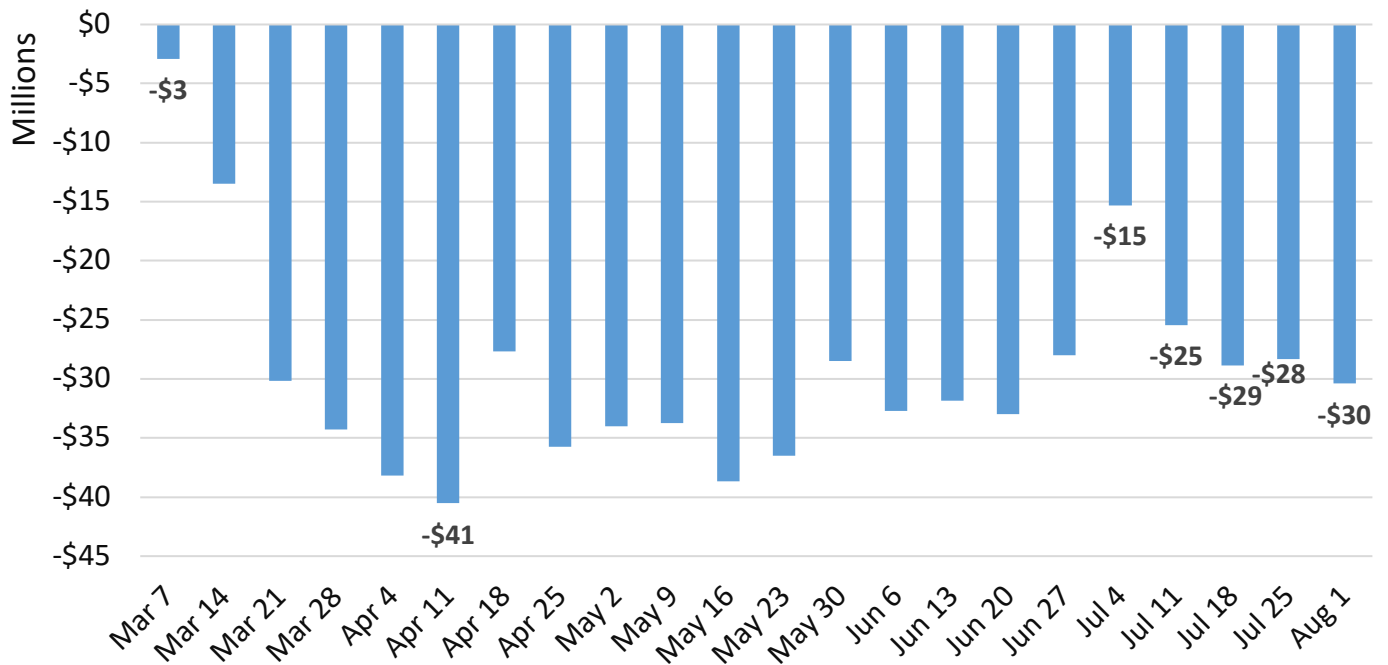
August 7, 2020

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

- Occupancy statewide is only 44.1 % for week ending August 1st - down from last week's 45.4% occupancy. Unfortunately, the percent of occupancy change over last year for this same week is at -39.4% versus a -38.1% decrease last week.
- Cumulatively, revenue from the Missouri lodging industry is down - \$619.8 million for March – Aug 1 compared to the same period last year. *For more trending information, please see slides below*



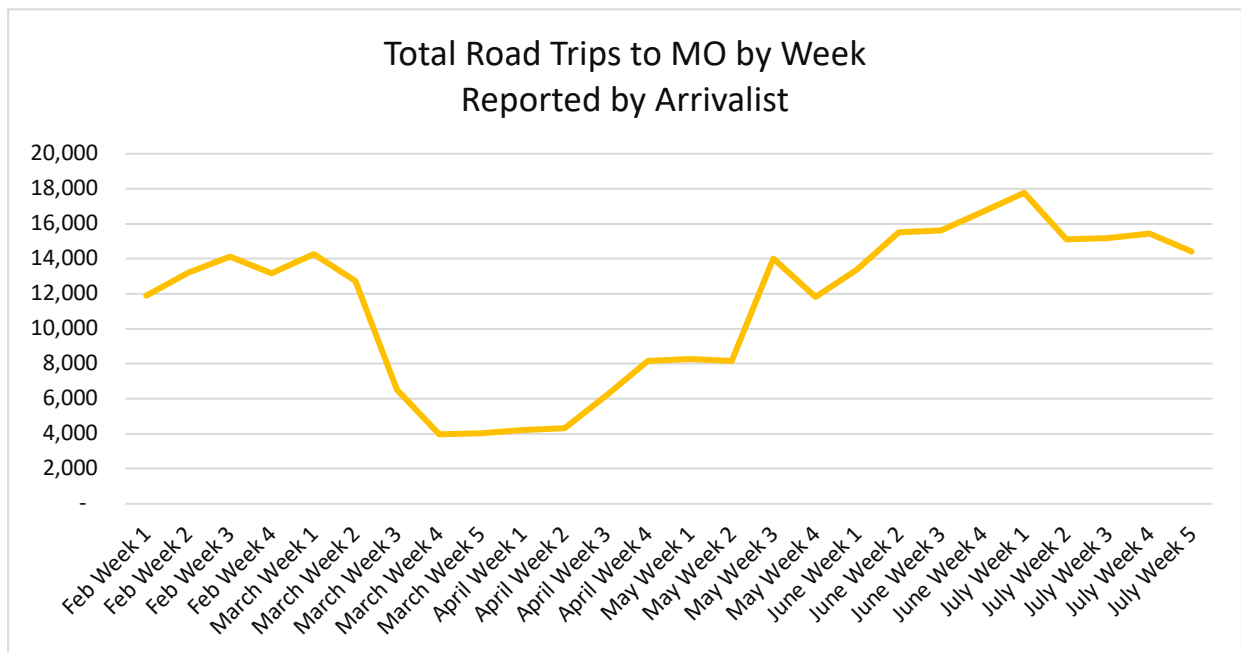
Lost Lodging Revenue in 2020 Compared to 2019



Attribution findings for Travelers to Missouri (Source: Arrivalist)

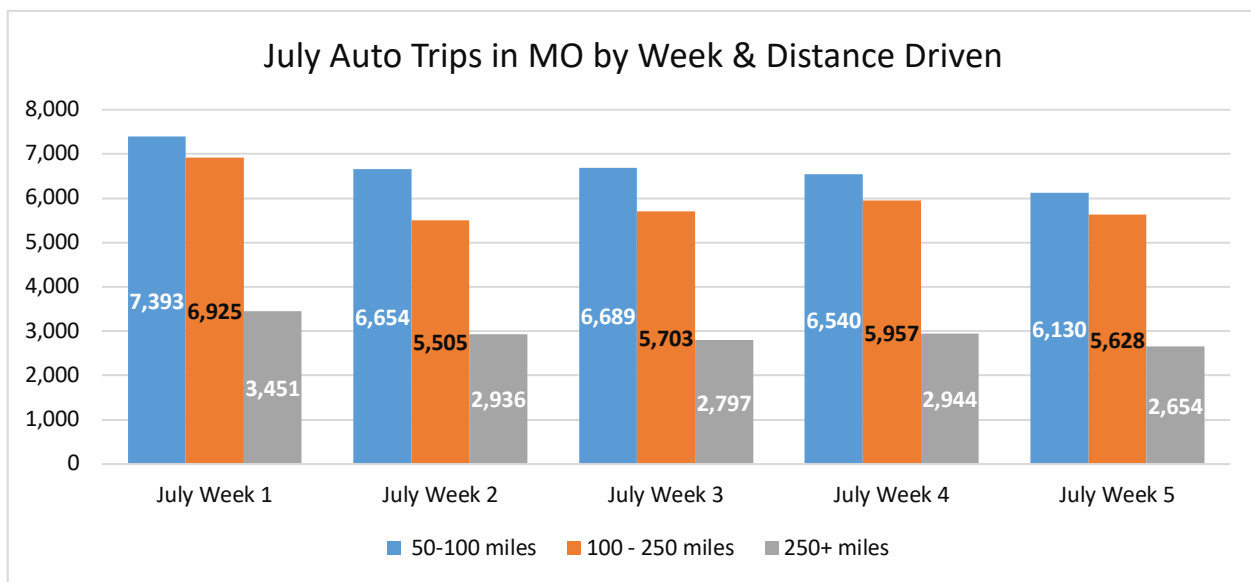
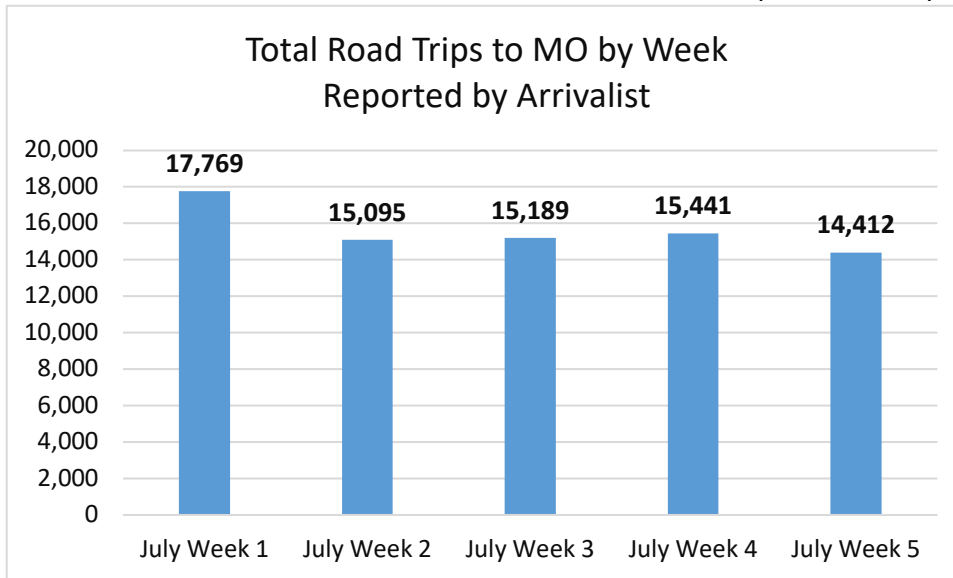
- Travel the 5th week of July was at its lowest level since the 1st week of June in terms of number of road trips.
- All road trips were down 7% compared to the prior week with trips of 250+ miles down the most at 10% lower than the 4th week of July.
- Trips of 50-100 miles and 100-250 miles were both down 6% compared to the prior week.

Total Road Trips to MO by Week Reported by Arrivalist



Arrivalist (Cont.)

- Trips of 50-100 miles and 100-250 miles were both down 6% compared to the prior week.



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

Here are the 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 of up to 50% from 5/18 through the end of June. They are also requiring reservations through 10/31.

TRAVELER SENTIMENTS: (Source: Destination Analysts)

Week of August 3

Key Findings to Know:

- Many Americans shifted from feeling the pandemic would get worse in the next month (53.7% down from 61.5%) to feeling things would be about the same (30.3% from 23.8%).
- Concerns about personally contracting the virus have elevated among millennial travelers in the past month.
- The proportion of American travelers that say they would be happy to see an ad promoting their community for tourism when it is safe has from 35.8% at the end of June receded to 29.1%.
- Nearly one-third of American travelers say they are less likely to visit the American destinations that they most associate with Coronavirus-related issues, even after the pandemic ends.
- American travelers are also more polarized in their travel readiness state of mind. While 48.5% report having leisure trip plans during one or more months in the remainder of the year.
- Those who do not have trip plans this year are, unsurprisingly, more concerned about the virus, but interestingly less likely to be travelers that typically visited National Parks and other types of public lands prior to the pandemic.
- Among those that will be traveling in 2020, plans for their next trip are largely well-formed, with beaches, National Parks and other rural areas most cited as the destinations.

Question: At this

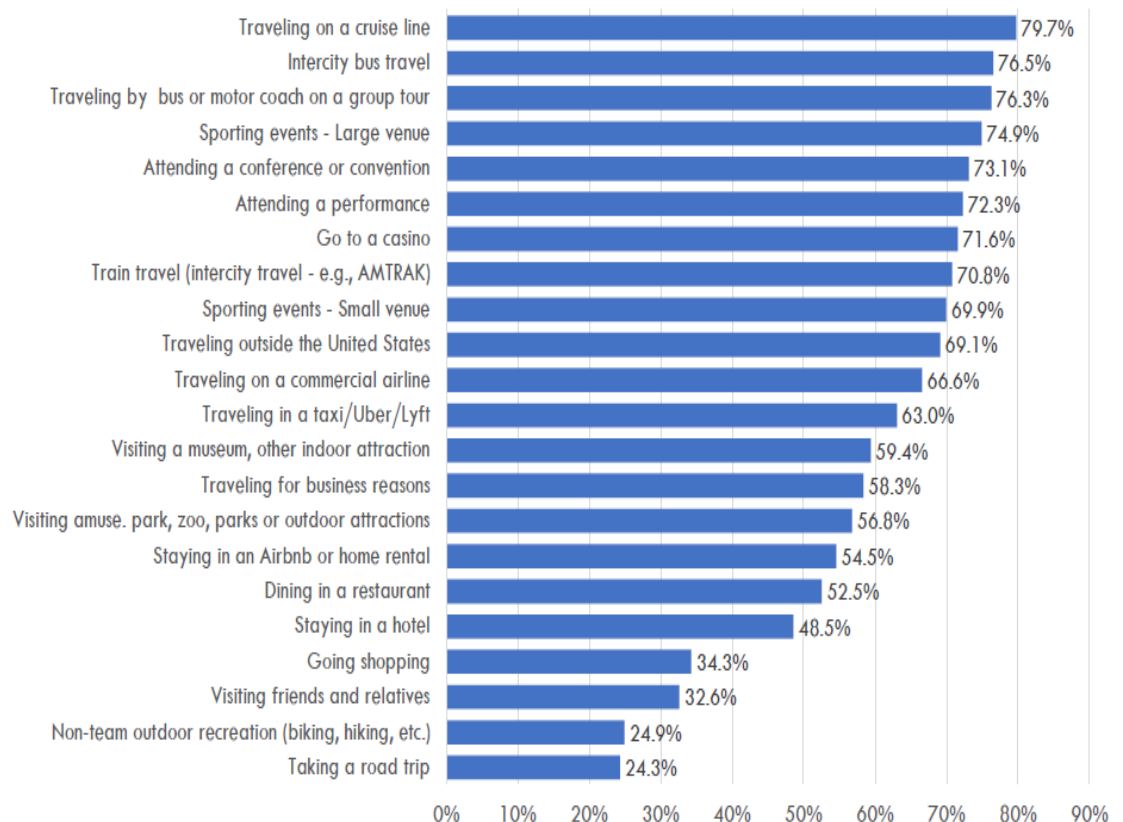
moment, how safe would

you feel doing each type

of travel activity?

(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)

Top 2-Box Score: "Somewhat Unsafe" or "Very Unsafe"



Traveler Sentiment Research (Source Longwoods, Int.) [Full Study Here](#)

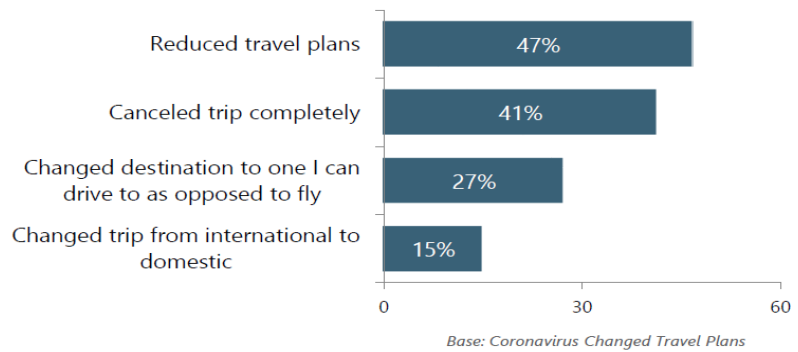
- The ever-shifting threat of the pandemic has taken its toll on consumer confidence in official information sources with the percentage of travelers relying on information on the safety of U.S. travel from the CDC or other federal health agencies dropping from 57% on April 22nd to 45% on July 29th.
- Confidence in information from the White House Coronavirus Task Force also declined, from 24% in April to 17% in July.
- Reliance on information from state health officials has slipped from 36% in April to 28% in July.

Silver Linings:

- All of the key sentiment indicators that had reversed course from mid-June thru early July appear to have stabilized and, in some cases, have begun to point back in the right direction.
- The volume of those reducing trip plans is once again exceeding the volume of those cancelling plans.
- 68% of travelling Americans still say they plan to travel in the next six months.

IMPACT ON TRAVEL PLANS

73%
of travelers planning to travel in the next six months will change their travel plans due to coronavirus

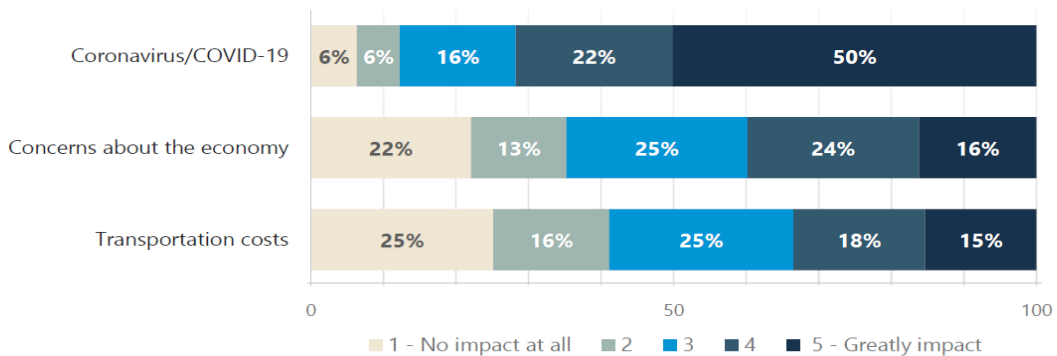


Travel Sentiment Study Wave 17



IMPACT ON TRAVEL PLANS

Factors Impacting Decisions to Travel in Next 6 Months



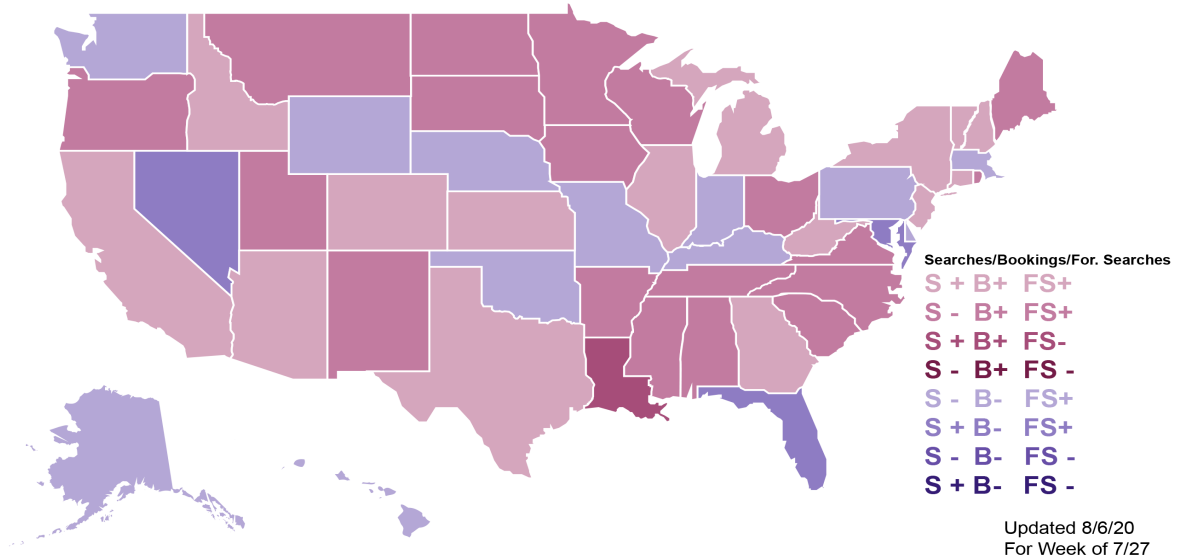
Travel Sentiment Study Wave 17



BOOKING DATA (Source: ADARA)

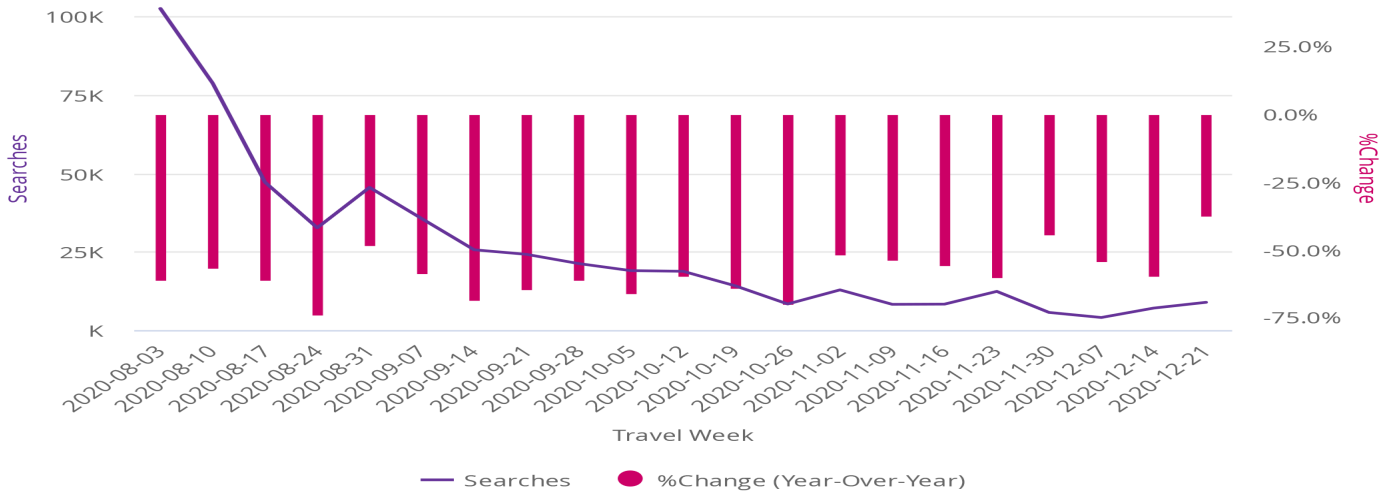
- It was another strong week across the country with 35 states having week over week increases in bookings! 11 States were down in searches & bookings and all states were up in forecasted searches except Louisiana.
- In Missouri, the state saw minimal decreases in bookings and searches but an increase in forecasted searches.
- Bookings decreased by 10 to 6,143 which is 69% behind the same week last year. The US average is -70% Searches decreased about 700 to 53,451 which is 63% behind the same week last year. US average is -69%.
- Forecasted searches increased 22% from 12/14-12/21.

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



Future Trend

20 Week Forecast



MO Tourism Economic Impact Losses

Feb 29 thru Aug 1

\$4.2 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
Aug 1 #s	-15	-20	-96	-209	-242	-256	-262	-264	-269	-263	-259	-259	-226	-189	-190	-177	-169	-154	-119	-144	-149	-145	-147

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
Aug 1 #s	-5%	-7%	-31%	-69%	-80%	-84%	-85%	-86%	-88%	-86%	-84%	-84%	-74%	-62%	-59%	-54%	-52%	-47%	-37%	-45%	-46%	-45%	-47%

(Source: Tourism Economics, an Oxford Economics Company)