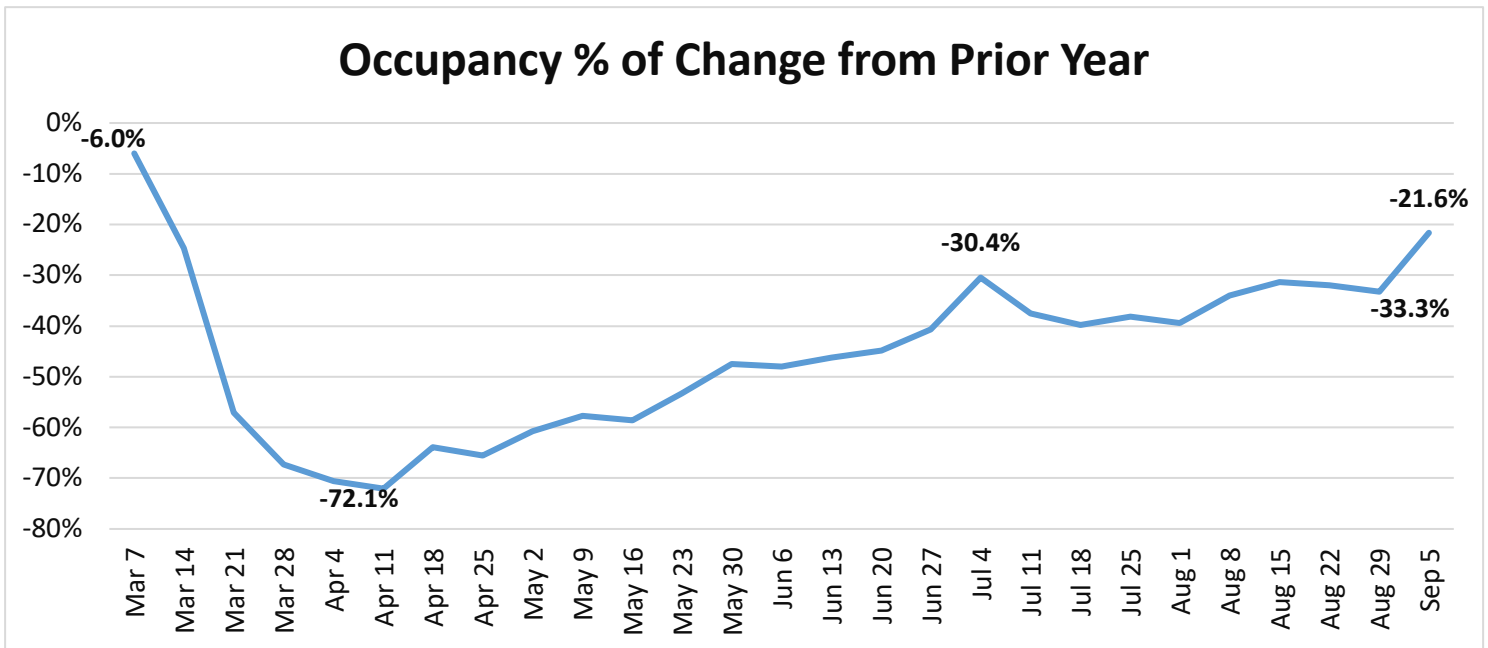
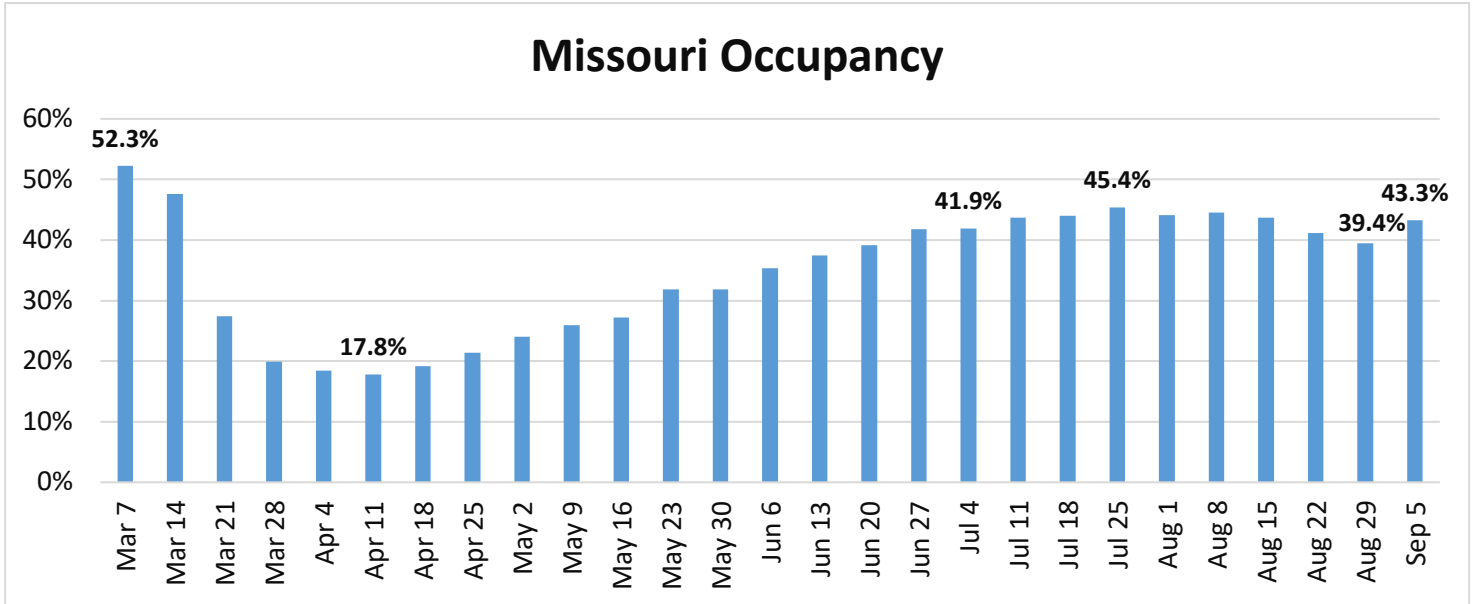


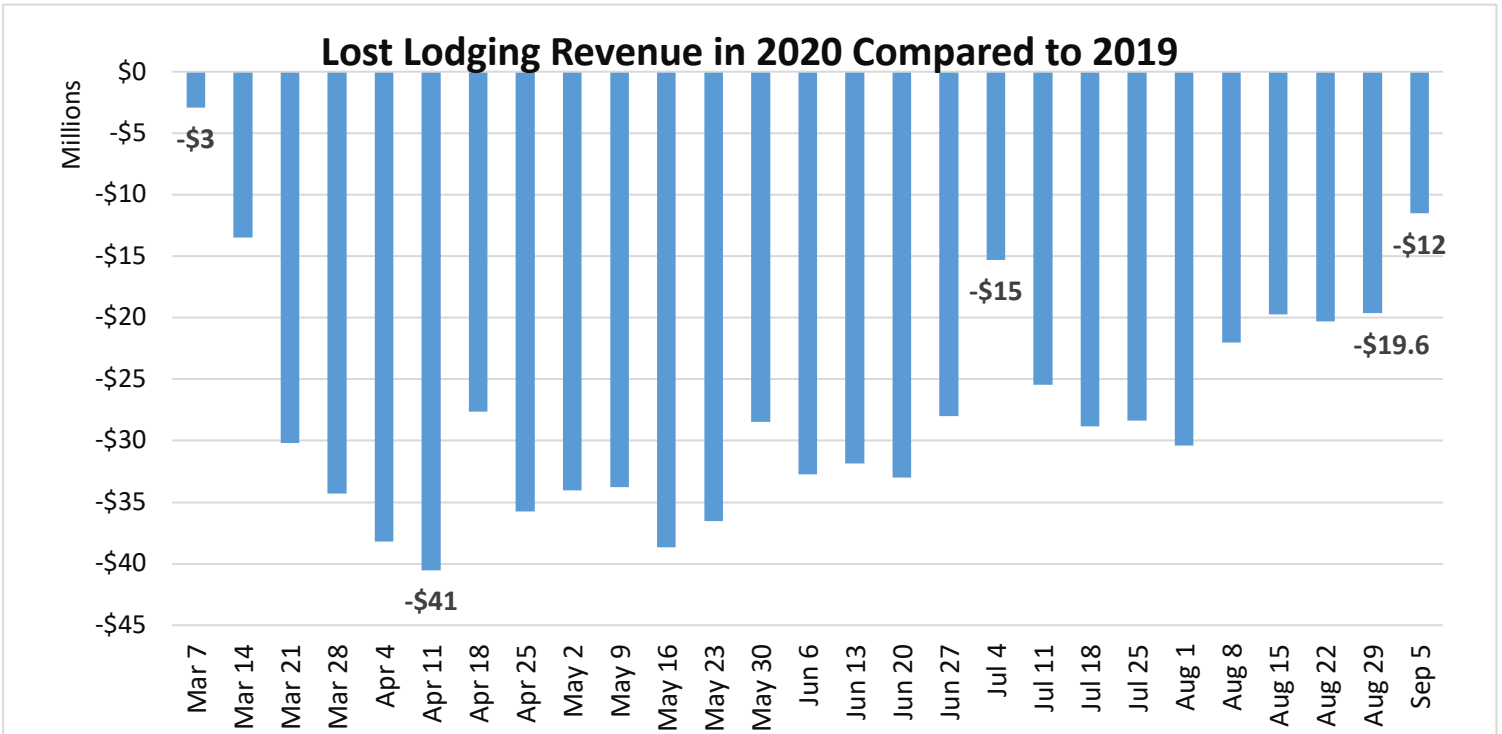
# WEEKLY RESEARCH HIGHLIGHTS REPORT

September 11, 2020

## STR Lodging Data: (Source: STR Lodging Data) [For trending information, please see slides below](#)

- Occupancy statewide is 43.3% for the week ending September 5 - up from last week's 39.4% occupancy.
- The occupancy change over last year for this same week is -21.6% versus a -33.3% decrease last week.
- It appears that the increase may have been amplified due to the fact that Labor Day last year was on September 2<sup>nd</sup> versus September 7<sup>th</sup> this year, so the travel that happened on the Saturday before the holiday last year was on August 30<sup>th</sup> compared to September 5<sup>th</sup> this year.
- Cumulatively, revenue from the Missouri lodging industry is down -\$713 million for March – Sept. 5 compared to the same period last year.

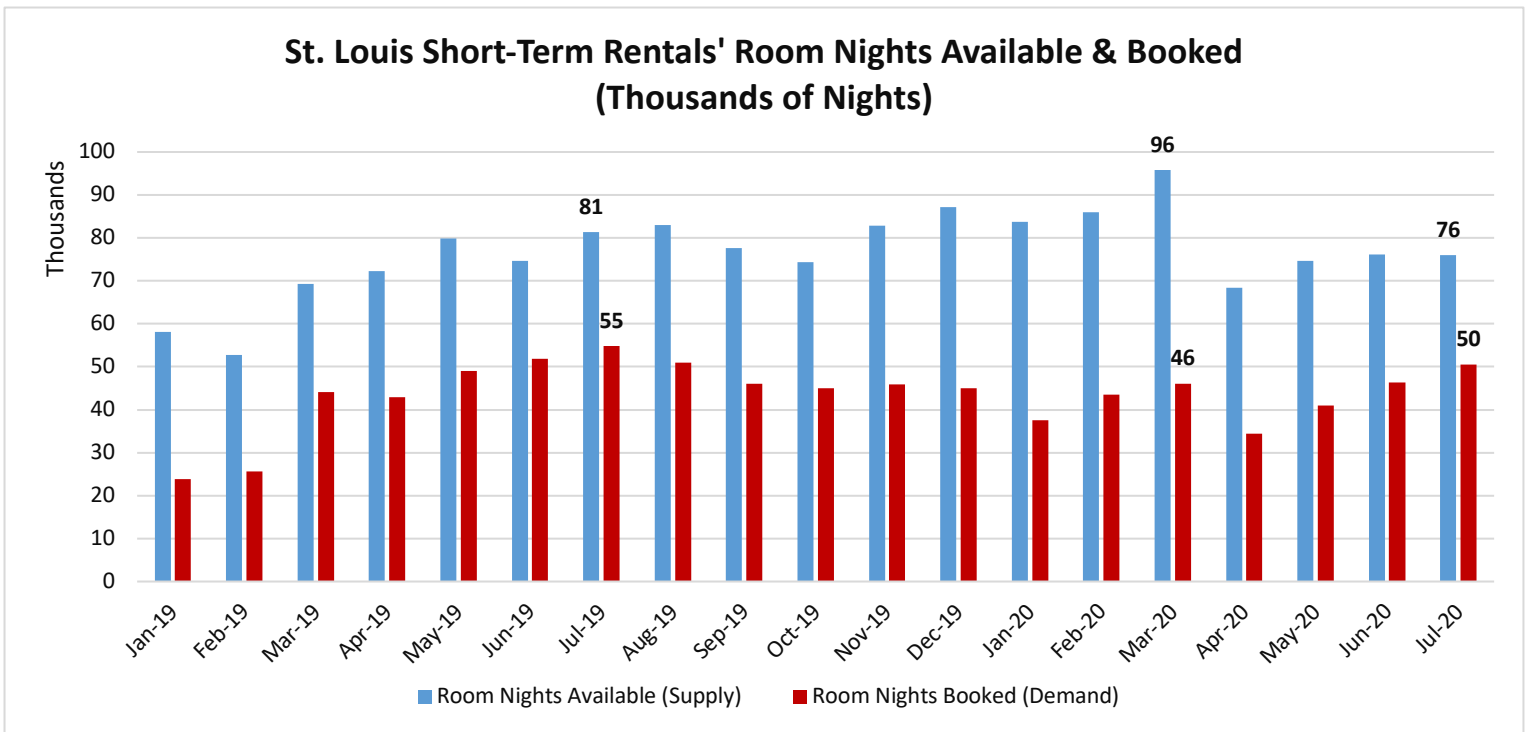




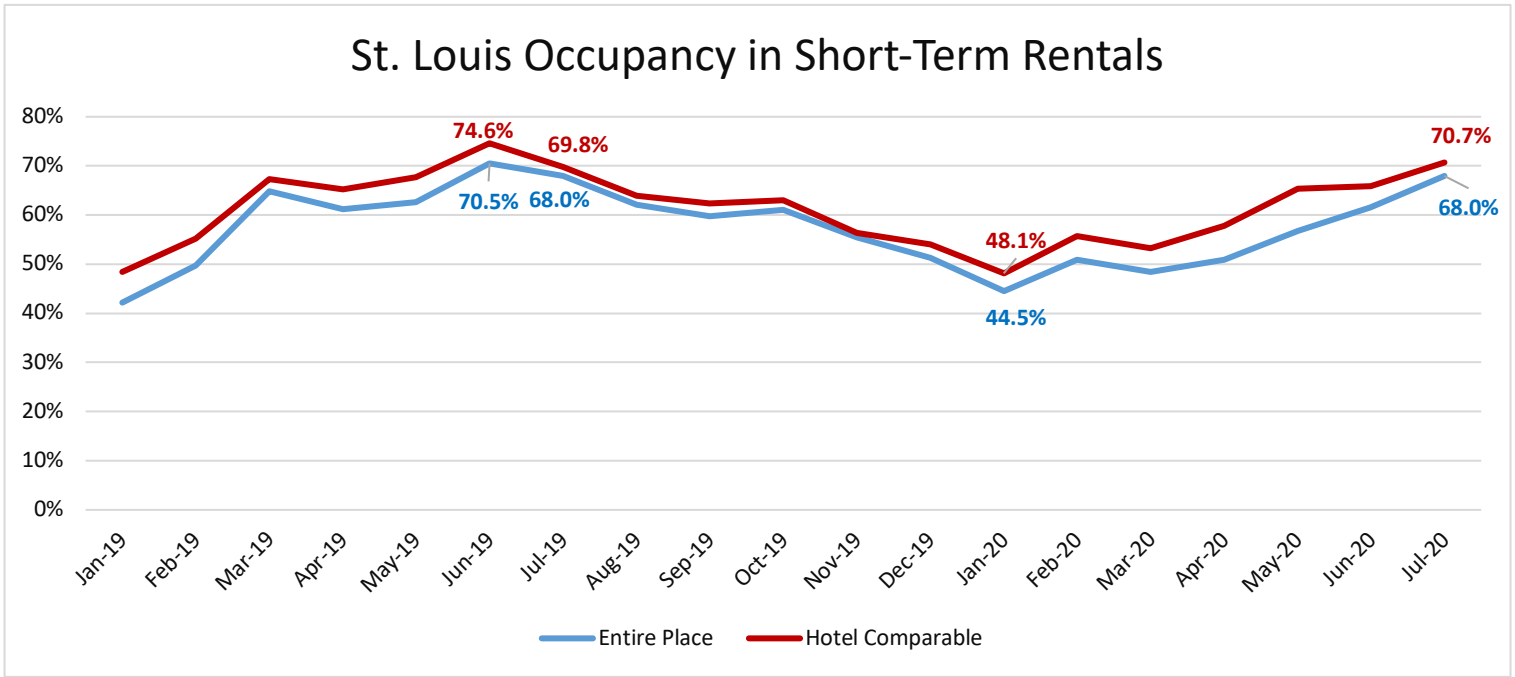
## Shared Lodging (Source: AirDNA) Through July 2020

### Featuring St Louis

- Room Nights Available (Supply) in July were down by 6.6% compared to July 2019.
- Room Nights Booked (Demand) in July were down by 7.8% compared to July 2019.

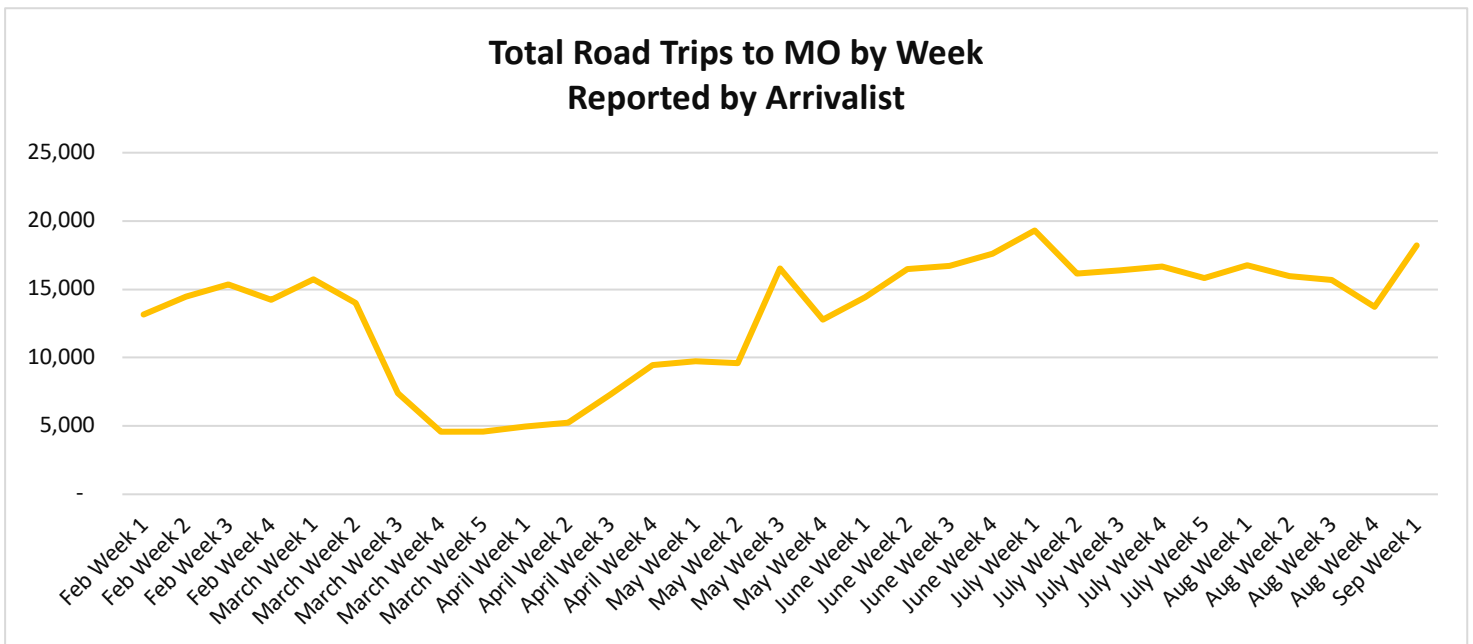


- Occupancy for Entire Place rentals was 68.0% in July, the same rate as July 2019.
- Hotel Room Comparable rentals was 70.7%, a slight increase of 1.3% over July 2019.

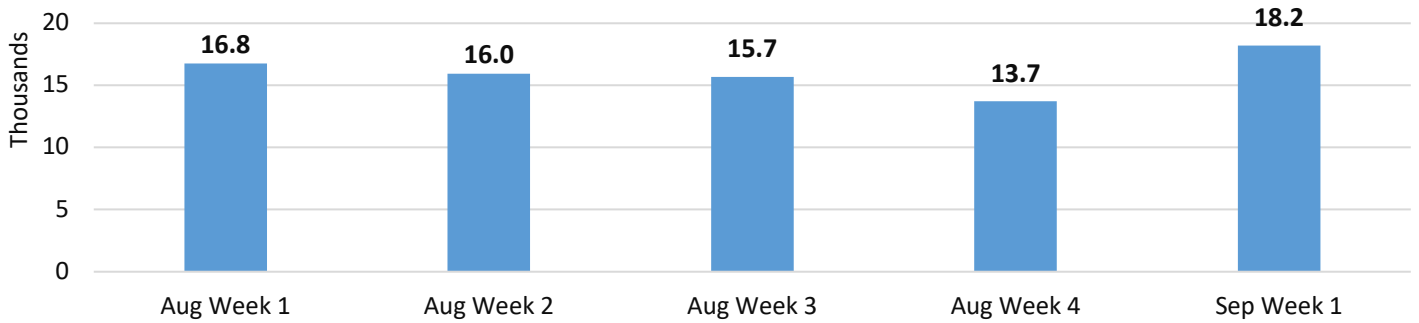


### **Attribution findings for Travelers to Missouri (Source: Arrivalist)**

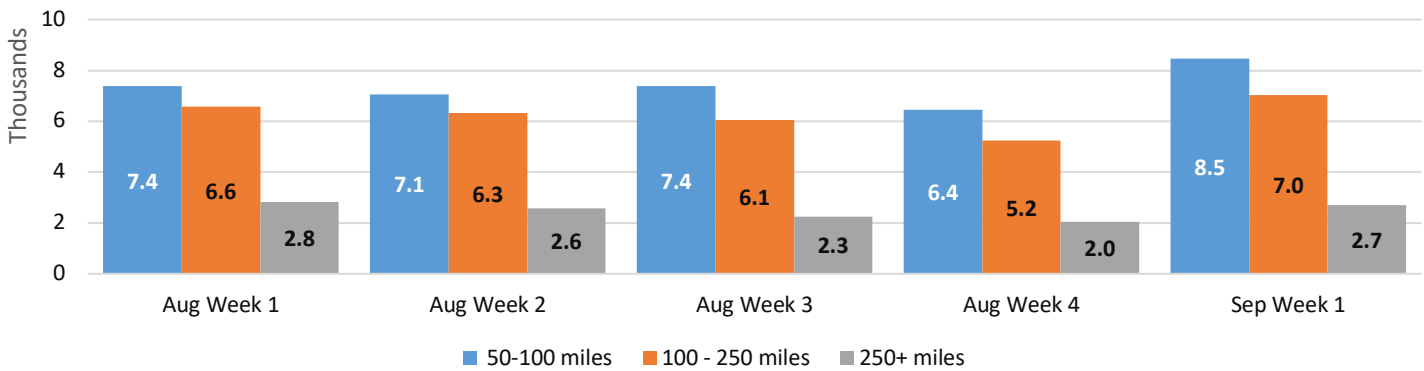
- Auto Trips for the first week of September increased by 33% over the last week of August
- Trips of 50 – 100 miles were up 31%
- Trips of 100 – 250 miles were up 34%
- Trips of 250+ were up 33%.



### Total Road Trips to MO by Week Reported by Arrivalist



### Auto Trips in MO by Week & Distance Driven

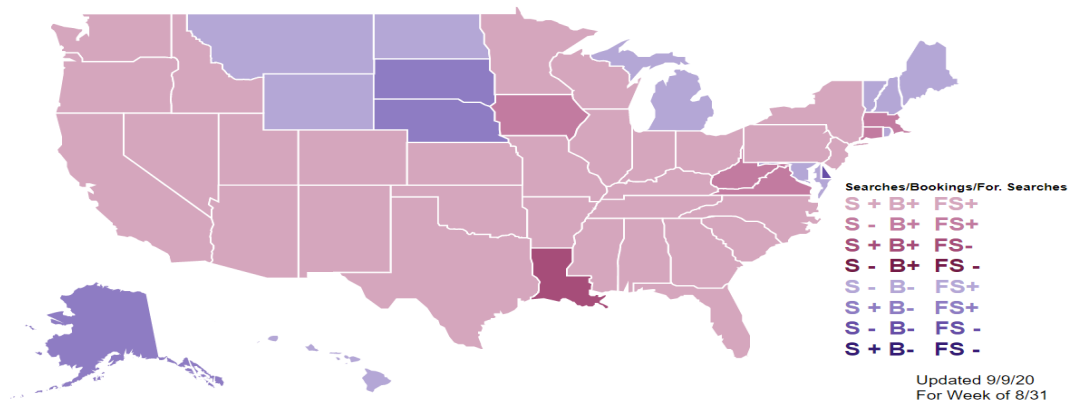


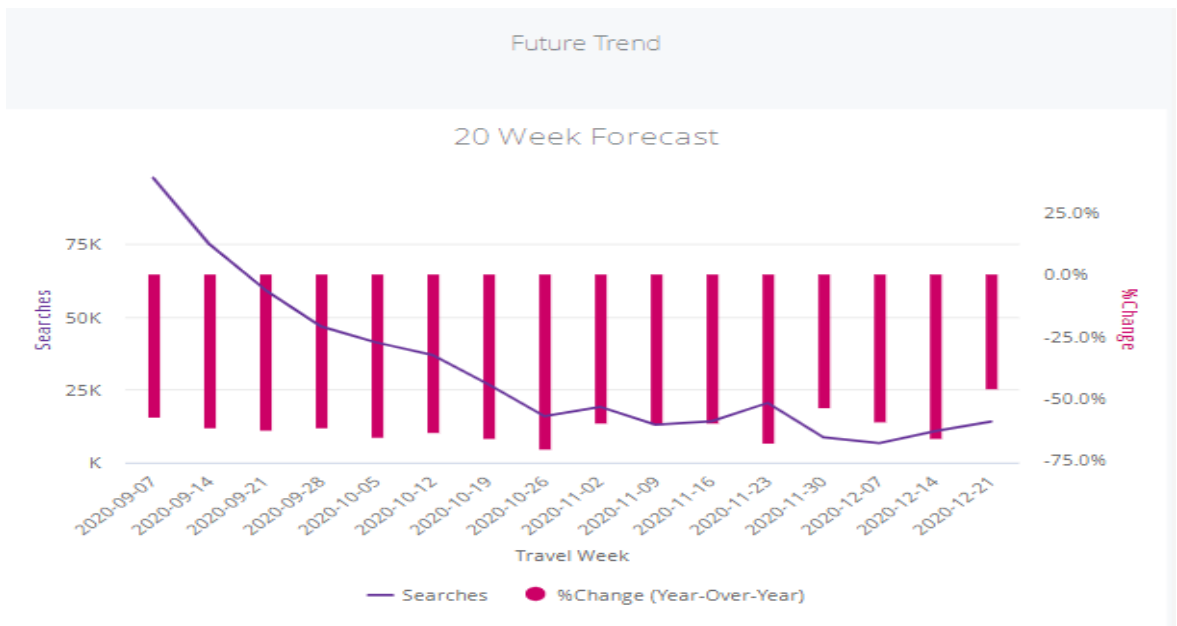
### **ATtribution DATA (Source: ADARA) This is the first week with 50K+ bookings since March 9!**

In the data for the first week of September, we saw encouraging improvements from the previous two weeks with 30 states, including Missouri, up in searches and bookings - that's more than the prior two weeks combined. Ten states were down in both searches and bookings to various degrees and another 10 states were scattered across several categories.

- As for Missouri, searches were up 1,828 to 68,994, which was a 45% decrease from the same week in 2019.
  - For comparison, nationally, searches were down 53% compared to last year.
- Bookings were up 459 to 7,034, which is a 62% decrease from the same week in 2019.
  - Nationally, bookings were down 62% compared to last year.

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

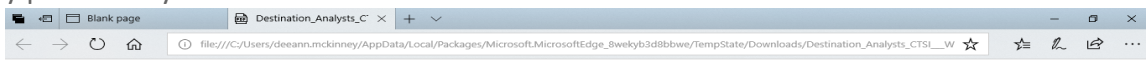




## **SENTIMENT ANALYSIS RESEARCH (Source: Destination Analysis)**

### **Key Findings to Know:**

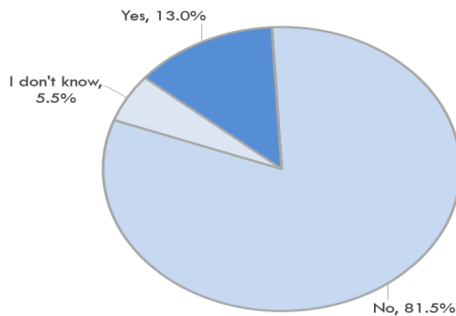
- For Americans pessimism remains in retreat. Strong concerns for COVID-19’s impact on personal health and financial safety are at or near the lowest levels recorded in the past 26 weeks.
- Perceptions of travel activities’ safety are the best they have been since the onset of the pandemic.
- Among the most confident they can travel safely right now are younger travelers and those in the South.
- Over half of American travelers remain in a “ready to travel” versus “need more time” mindset and 75% continue to report that they have at least tentative trip plans.
- 13.0% of American travelers reported taking a trip for Labor Day, slightly lower than July 4<sup>th</sup> (16.5%).
- Over 1/3 of American travelers report they took a leisure trip this past summer-mainly beaches & rural areas.
- Over 80% of these travelers stayed overnight on these leisure trips, largely in friends/relatives homes and hotels; over two-thirds said they researched the coronavirus-related rules and regulations in their trip destination.
- Looking at how more (safe) travel can be inspired, online content, email, search engine marketing and social media are seemingly particularly effective.



### **LABOR DAY WEEKEND TRIPS TAKEN**

**Question:** Are you traveling (or planning to travel) for any reason this weekend (Labor Day weekend)?

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)



**MO Tourism Economic Impact Losses**  
Feb 29 thru Sep 5  
**\$4.8 Billion Loss in Year-Over-Year Travel Spending**

**MO TOURISM INDUSTRY ECONOMIC IMPACT**

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

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	15-Aug	22-Aug	29-Aug	5-Sep
-15	-20	-96	-209	-242	-256	-262	-264	-269	-263	-259	-259	-226	-189	-190	-177	-169	-154	-119	-144	-149	-145	-147	-129	-113	-112	-119	-66

**YEAR-OVER-YEAR WEEKLY LOSSES IN TRAVEL SPENDING**

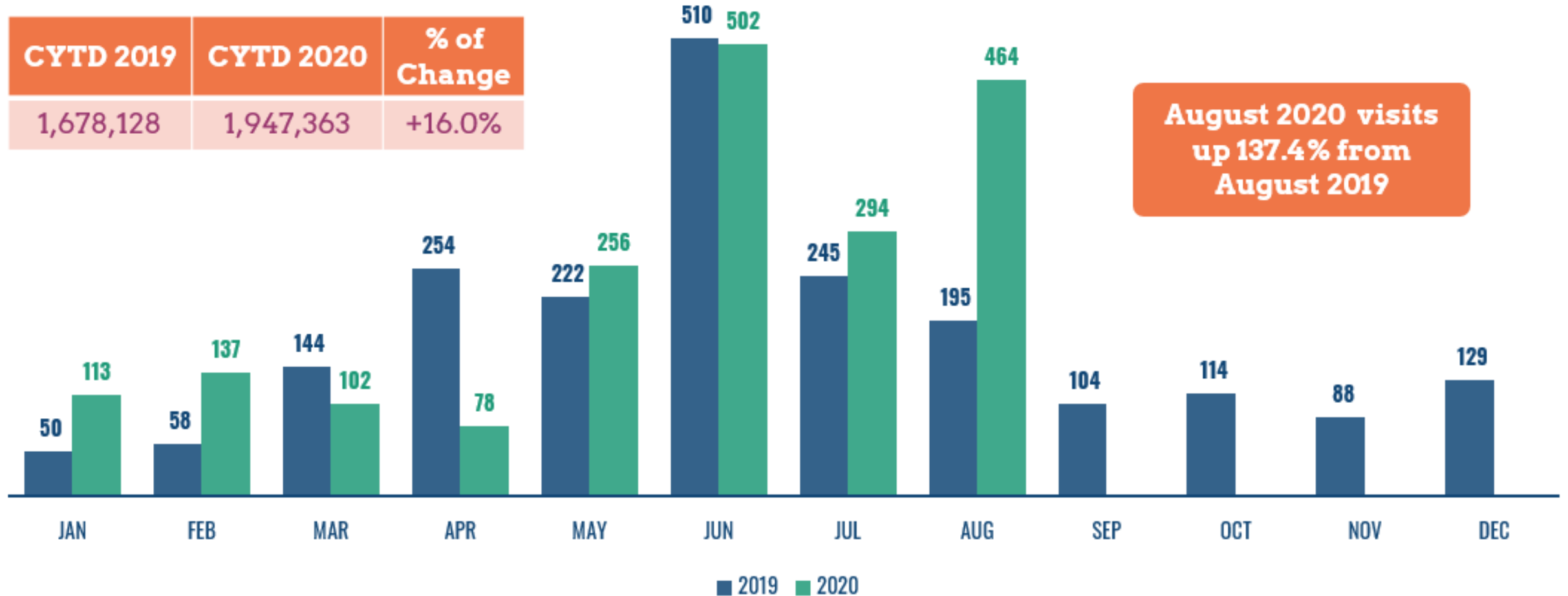
29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	4-Apr	11-Apr	18-Apr	25-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul	11-Jul	18-Jul	25-Jul	1-Aug	8-Aug	15-Aug	22-Aug	29-Aug	5-Sep
-5%	-7%	-31%	-69%	-80%	-84%	-85%	-86%	-88%	-86%	-84%	-84%	-74%	-62%	-59%	-54%	-52%	-47%	-37%	-45%	-46%	-45%	-47%	-41%	-36%	-36%	-38%	-22%

*(Source: Tourism Economics, an Oxford Economics Company)*

# Visits to VisitMO.com by Month

CYTD 2019	CYTD 2020	% of Change
1,678,128	1,947,363	+16.0%

THOUSANDS



**August 2020 visits up 137.4% from August 2019**

May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns.