

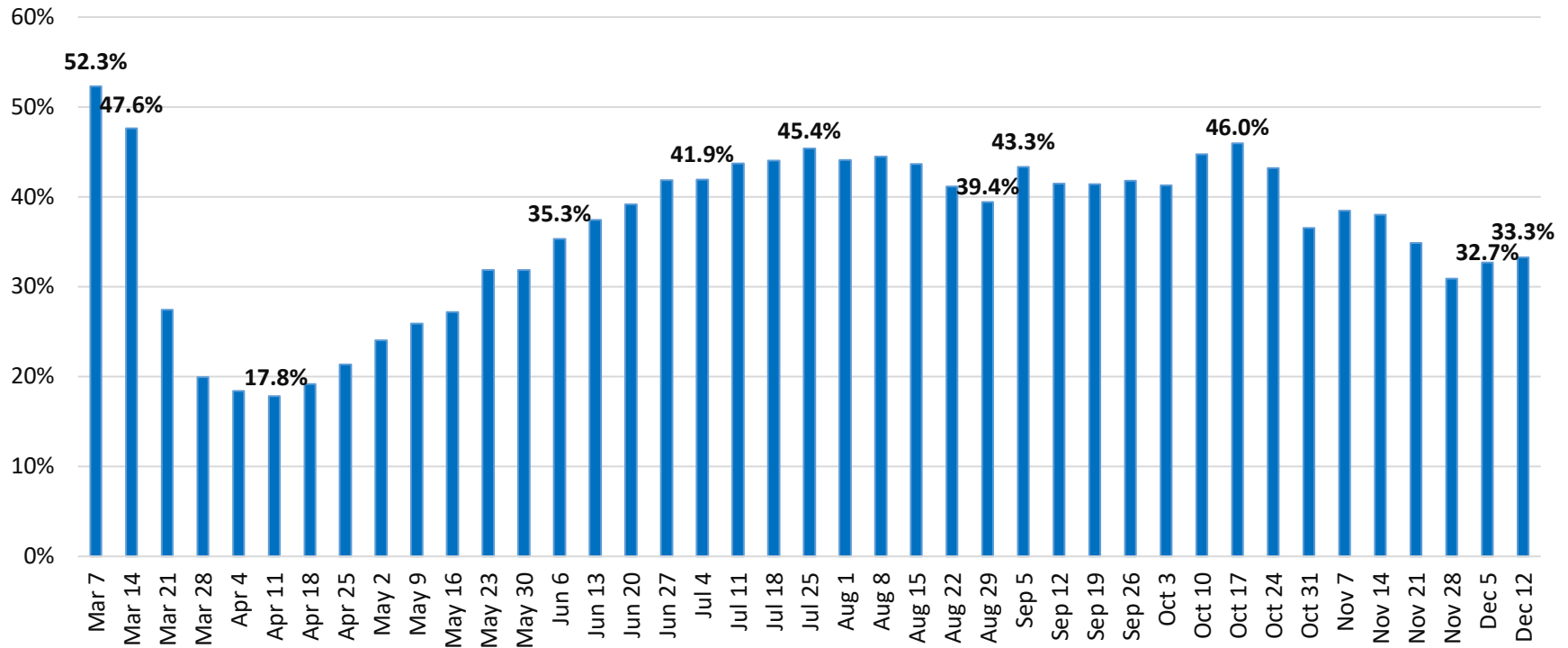
# RESEARCH HIGHLIGHTS REPORT

December 18, 2020

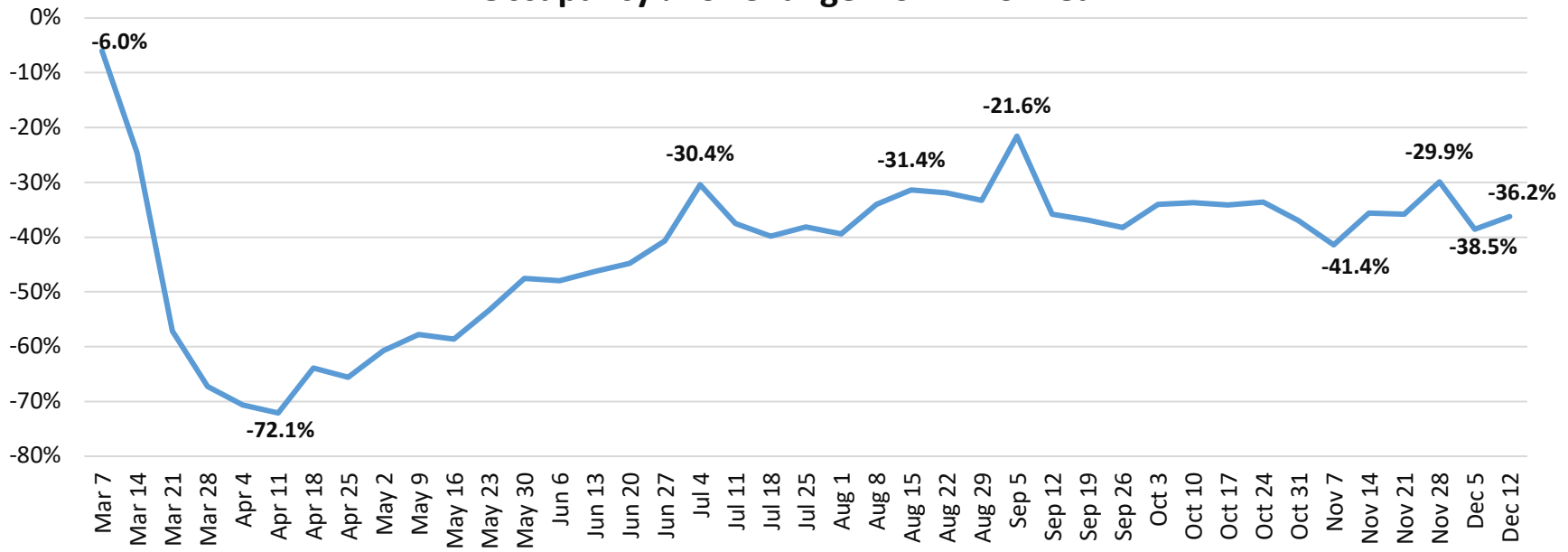
**STR Lodging Data: (Source: STR Lodging Data) For trending information, please see slides below**

- Occupancy statewide is 33.3% for the week ending December 12 -- up from last week's 32.7% occupancy.
- The Occupancy change compared to last year for this same week is -36.2% versus a -38.5% decrease last week.
- Cumulatively, revenue from the Missouri lodging industry is down \$1.02 billion since March compared to the same period last year.

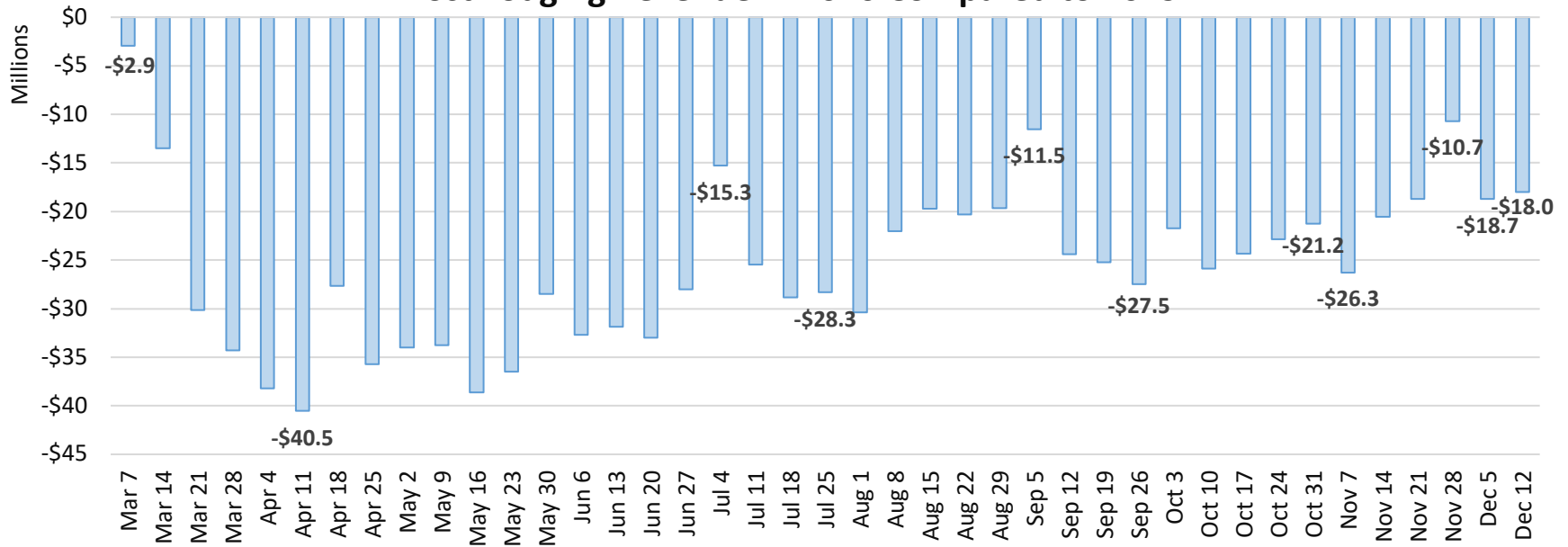
## Missouri Occupancy



## Occupancy % of Change from Prior Year



## Lost Lodging Revenue in 2020 Compared to 2019

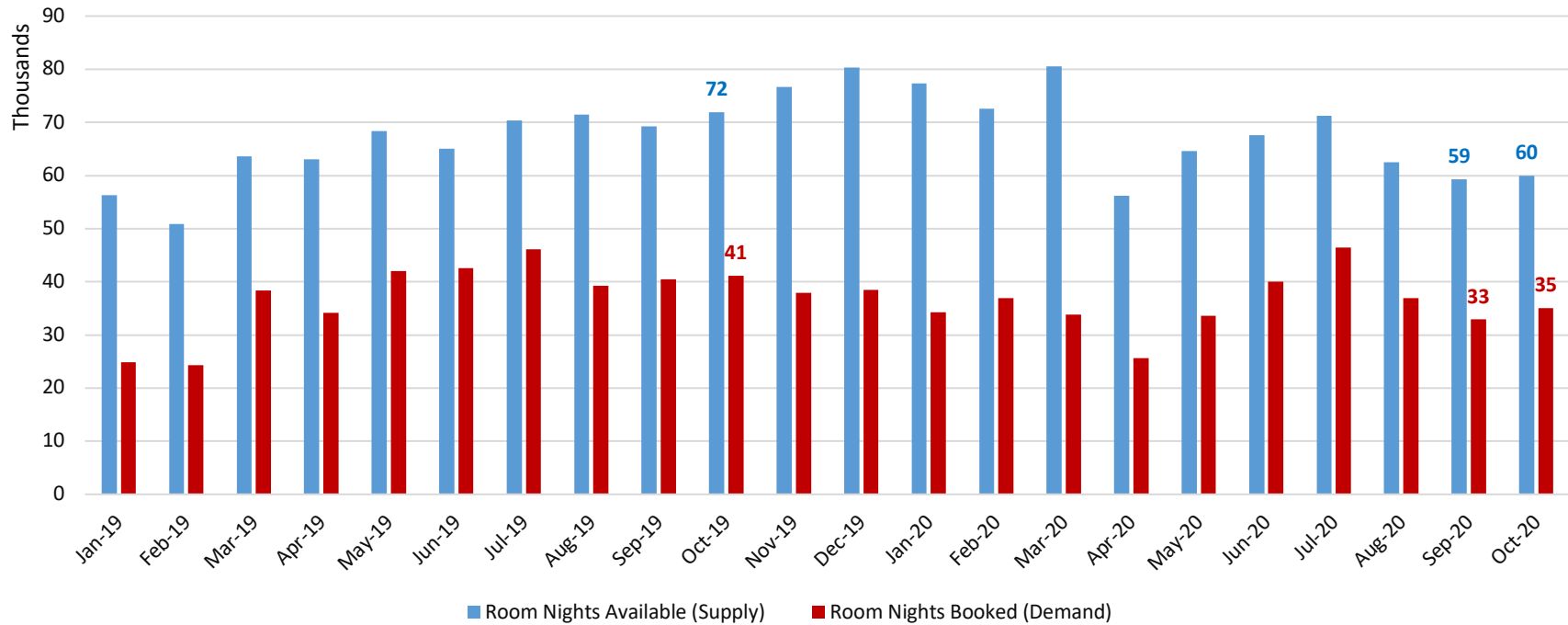


## Shared Lodging (Source: AirDNA) Through October 2020

### Featuring Kansas City

- Room Nights Available (Supply) in October decreased by 16.6% from October 2019
- Room Nights Booked (Demand) in October decreased by 14.8% from October 2019

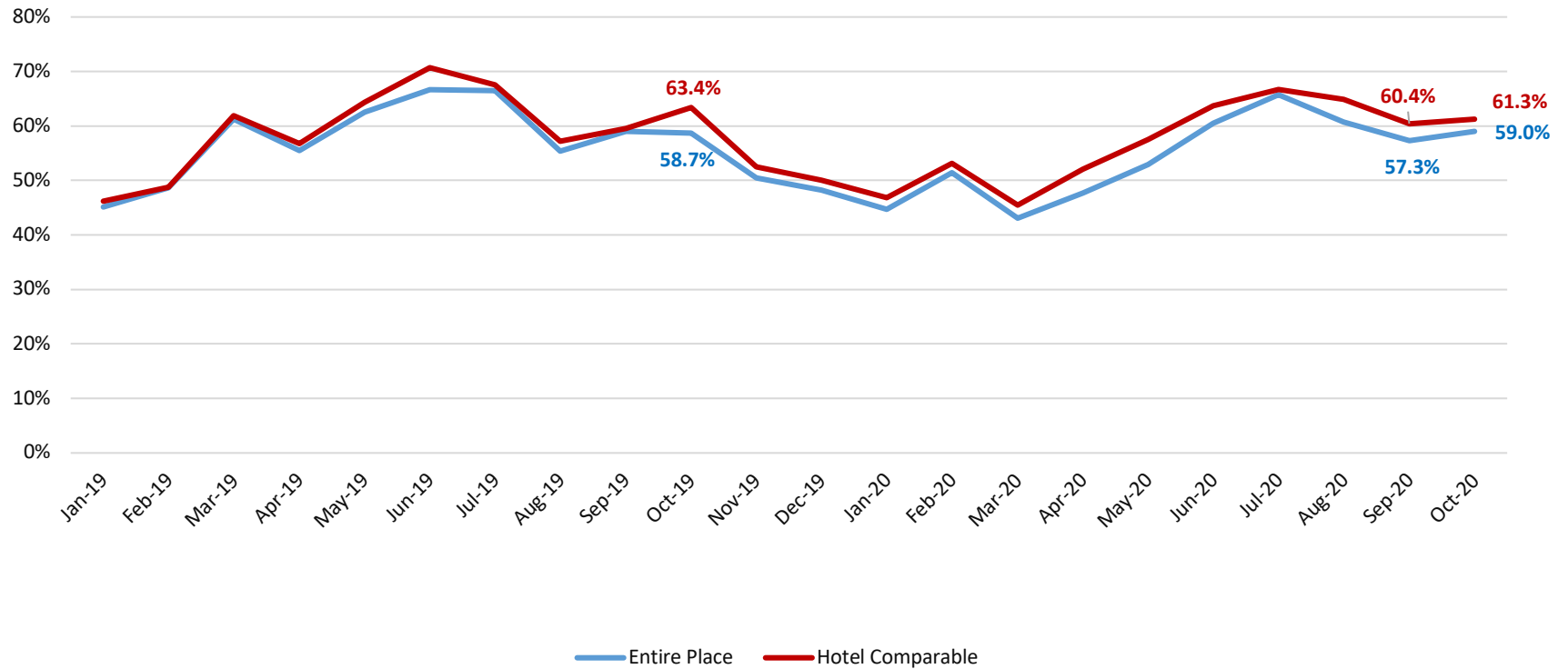
## Kansas City Short-Term Rentals Room Nights Available & Booked (Thousands of Nights)



## Shared Lodging (Source: AirDNA) - Continued

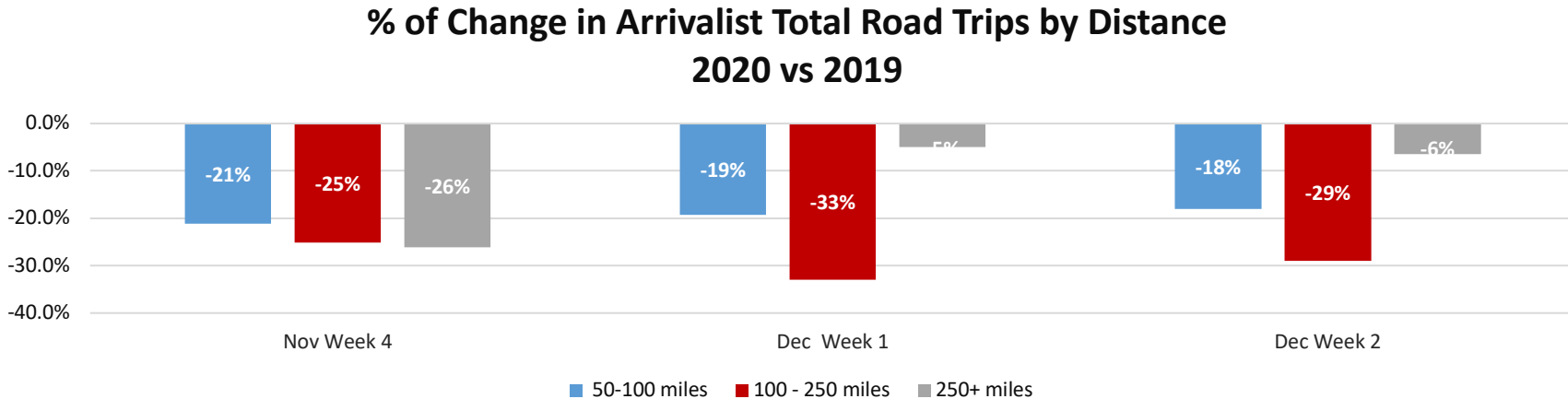
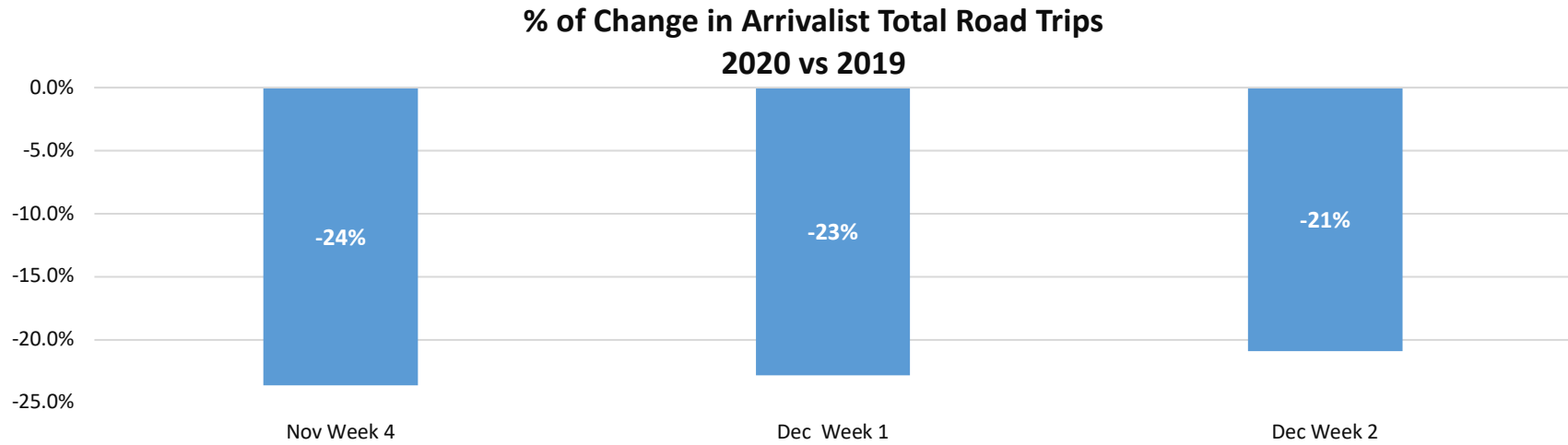
- Occupancy for Entire Place rentals was 59.0% in October, an increase of 0.5% from October 2019
- The 2020 average Year-to-Date Occupancy for Entire Place rentals was 54.3%, a 6.3% decrease from 2019 YTD
- Occupancy for Hotel Room Comparable rentals was 61.3%, a decrease of 3.4% from October 2019
- The 2020 average YTD Occupancy for Hotel Comparable rentals was 57.2%, a 4.1% decrease from 2019 YTD

### Kansas City Occupancy in Short-Term Rentals



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

- Total Arrivalist-reported road trips for the second week of December were down by 21% compared to 2019.
- Shorter road trips of 50-100 miles were down 18% compared to 2019.
- Trips of 100-250 miles were down 29% compared to 2019
- Trips of 250+ miles were down 6% from 2019.



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

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

- “After dipping last week, Americans’ anxiety about the coronavirus came on strong again this week—both from a personal health and financial standpoint.
- These anxieties are hammering sentiment about travel right now. Rather than skewing towards readiness, Americans’ travel mindset is now evenly split between readiness and hesitation. Travel guilt, loss of interest in traveling for the time being, and agreement travel should be limited to essential needs only have all increased, while likelihood to travel over the next three months has decreased. Nearing two-thirds of Americans say the current pandemic situation makes them less likely to travel over the next three months. Such sentiments have led to inevitable behaviors—48.4% report they cancelled or postponed a trip specifically because of this current surge.
- Positive vaccine news is appearing to have a profound effect. 58.9% of Americans are back to feeling that the vaccine developments make them more optimistic about life returning to normal in the next six months, while 51.0% say the vaccines makes them more optimistic they can travel safely by then.
- The pandemic has, unsurprisingly, most weakened Americans’ sense of physical safety, as well as, sadly, their excitement about the future. However, an important percentage of Americans feels the pandemic has strengthened their feeling of being loved by others, and made them feel proud of themselves.
- Americans continue to exhibit receptivity to travel marketing for future trips. 50.1% continued to show higher degrees of excitement about taking a getaway soon, and 45.7% continue to have higher levels of openness to travel inspiration. The percent of Americans who recalls seeing a travel advertisement recently has risen steadily since May.
- Looking at the preferred channels for travel inspiration among those Americans most ready to travel, Facebook and Instagram, search engines and email campaigns is where these travelers will be most receptive.
- The percent of American travelers who have at least tentative plans to attend a convention or conference in the next year has risen to 23.5% from 15.7% two months ago. Comfort attending these events starts to grow in June 2021 and continues throughout the subsequent months.
- In our many recent interviews of meeting planners, it looks like hybrid events will be a norm in 2021. Fortunately, among those who have traveled for conventions in the last two years, 51.7% say they prefer in-person events. Yet, greater than one in five of these travelers (22.0%) say they prefer hybrid meetings. However, the destination in which a meeting is held could still sway a preference for in-person.”

# NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT AS OF DECEMBER 13<sup>TH</sup>

(% ANSWERING 10-6 ON 11-POINT SCALE)



**NATIONAL  
ECONOMY**



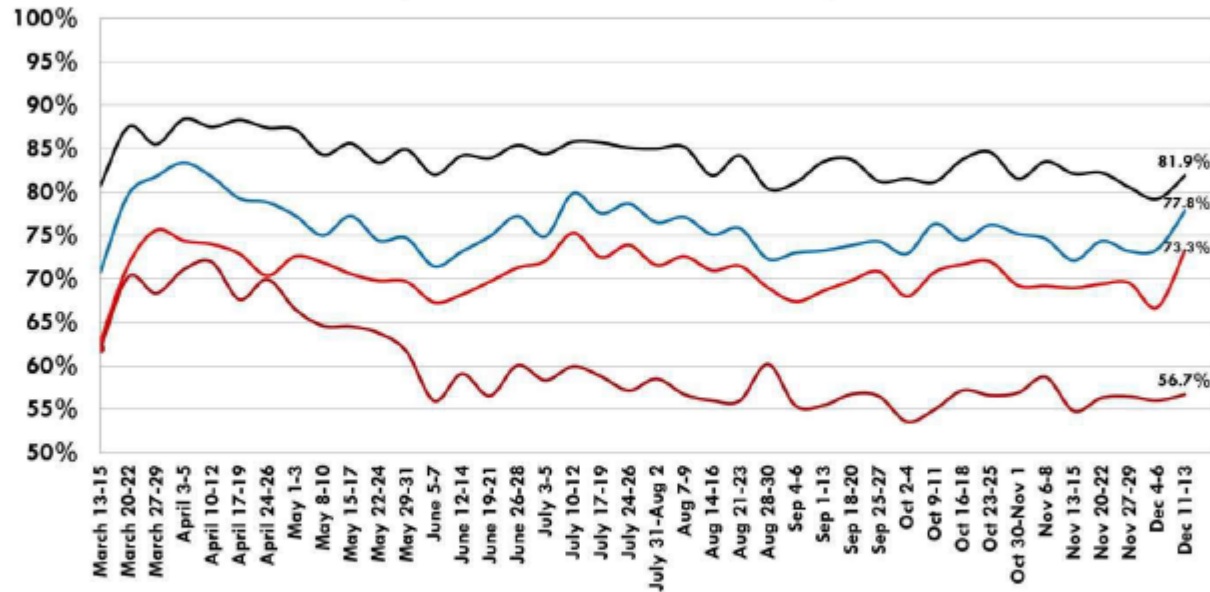
**HEALTH OF  
FRIENDS & FAMILY**



**PERSONAL  
HEALTH**



**PERSONAL  
FINANCES**



More concern



Less concern

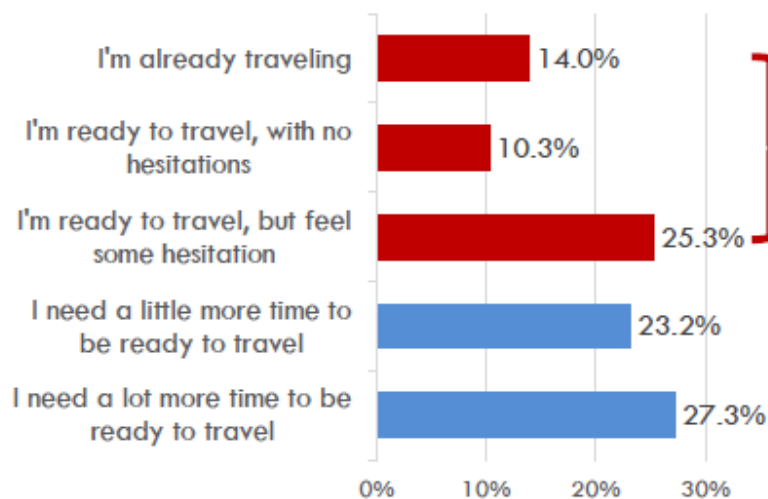
**QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE/YOUR \_\_\_\_\_ ?**

(Base: Waves 1-40. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204 and 1,206 completed surveys.)

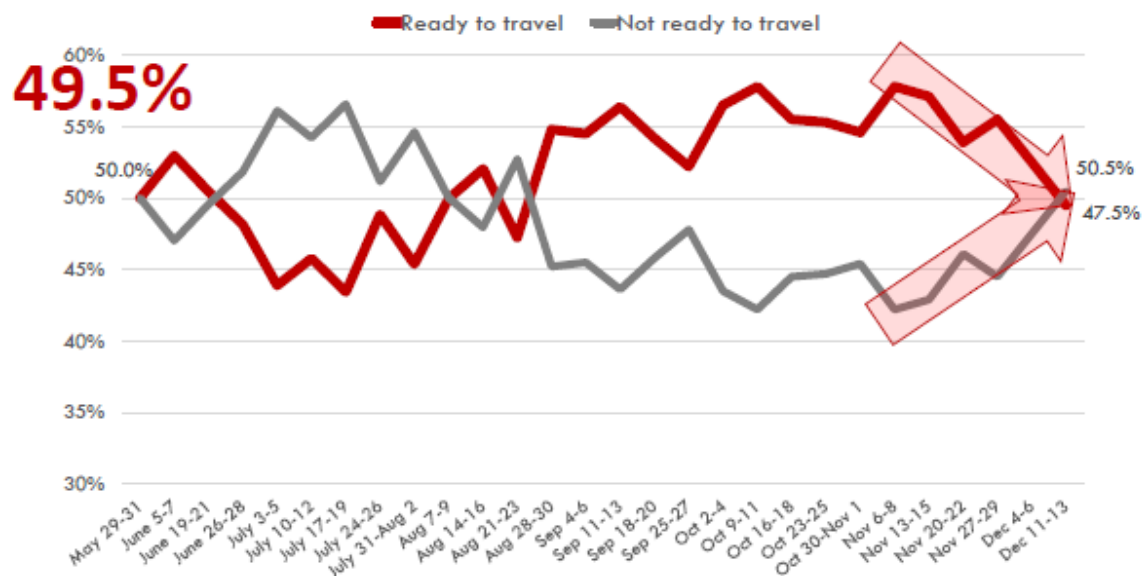
Destination  Analysts  
DO YOUR RESEARCH

# TRAVEL STATE-OF-MIND

**Question:** When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



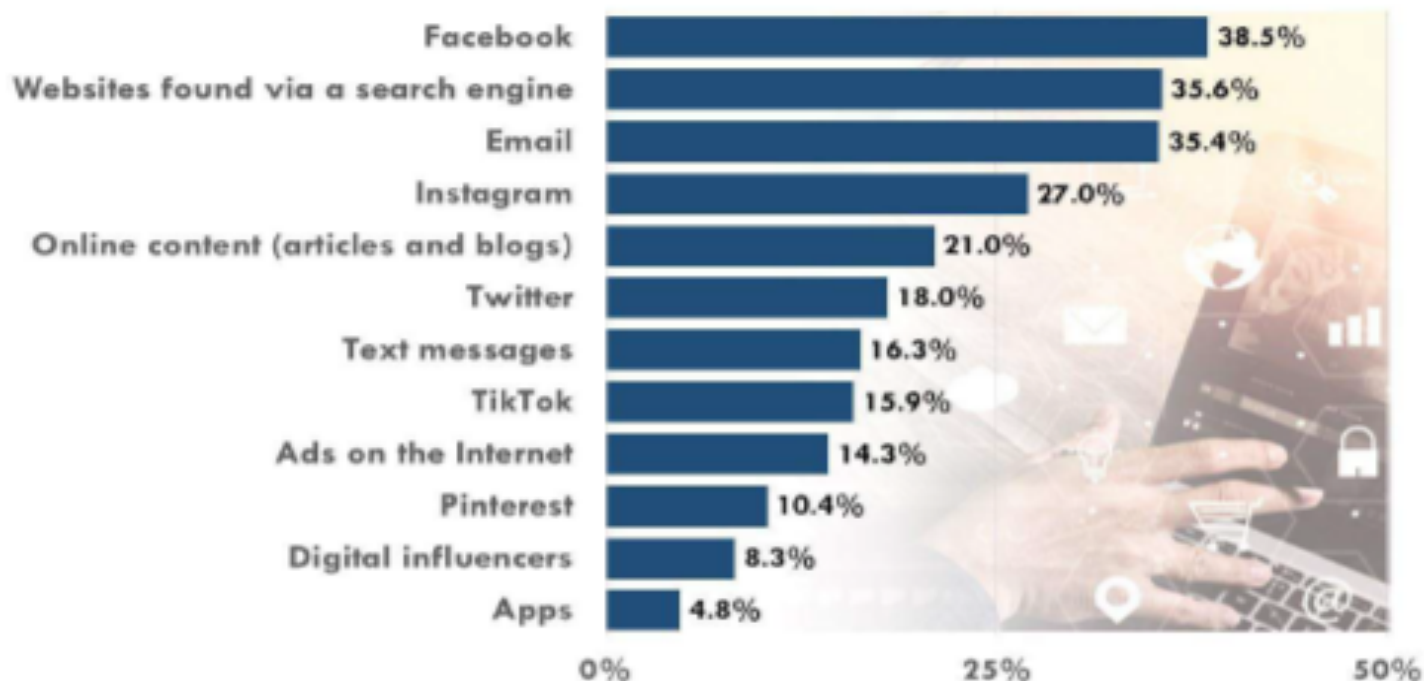
Historical data



(Base: Waves 12-13 and 15-40. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204 and 1,206 completed surveys.)



## TOP CHANNELS FOR TRAVEL INSPIRATION AMONG AMERICANS MOST READY TO TRAVEL AS OF DECEMBER 13<sup>TH</sup>



**Question:** Now let's talk about travel advertising and promotions. Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit? (Please select all that apply)

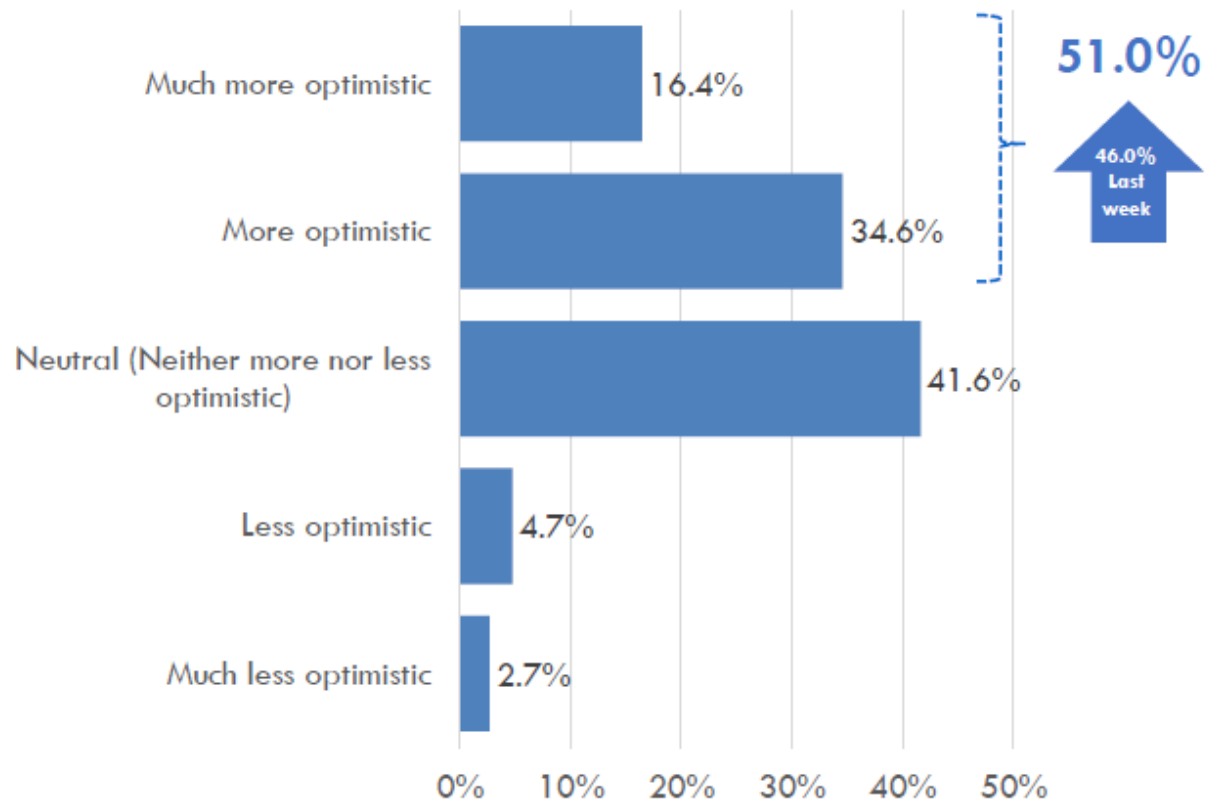
*(Base: Wave 40 data. Respondents who selected "I'm already traveling" or "I'm ready to travel, with no hesitations" to the question: "When it comes to getting back out and traveling again, which best describes your current state-of-mind?", 278 completed surveys. Data collected December 11-13, 2020)*

# OPTIMISM FOR A RETURN TO TRAVEL NORMALCY

**Question:** Does recent news about vaccine developments affect your optimism about being able to travel safely in the next SIX (6) MONTHS?  
(Select one to fill in the blank)

The vaccine news has made me  
**about BEING ABLE TO TRAVEL SAFELY** in the next six months.

*(Base: Wave 40 data. All respondents, 1,206 completed surveys. Data collected December 11-13, 2020)*



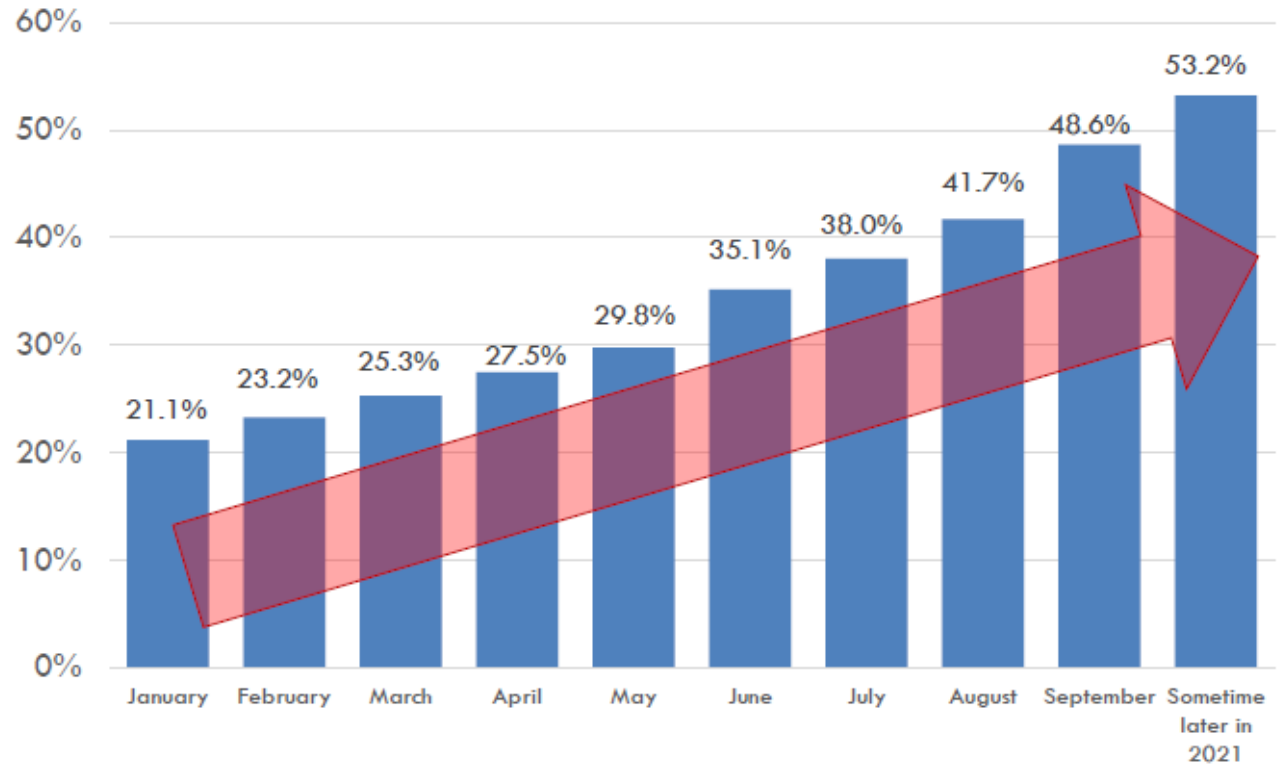
# MONTH WHEN ATTENDEES EXPECT TO FEEL COMFORTABLE

**Question:** Please think about the current path of the COVID-19 situation, and imagine your employer asks you to attend a convention or conference next year. For each month listed, how comfortable do you expect you would be attending the convention or conference? (Select one to fill in the blank for each month)

I would be \_\_\_\_\_ attending a conference or convention in this month.

*(Base: Wave 40 data. All respondents, 1,206 completed surveys. Data collected December 11-13, 2020)*

Top 2-Box Score: Comfortable or Very comfortable



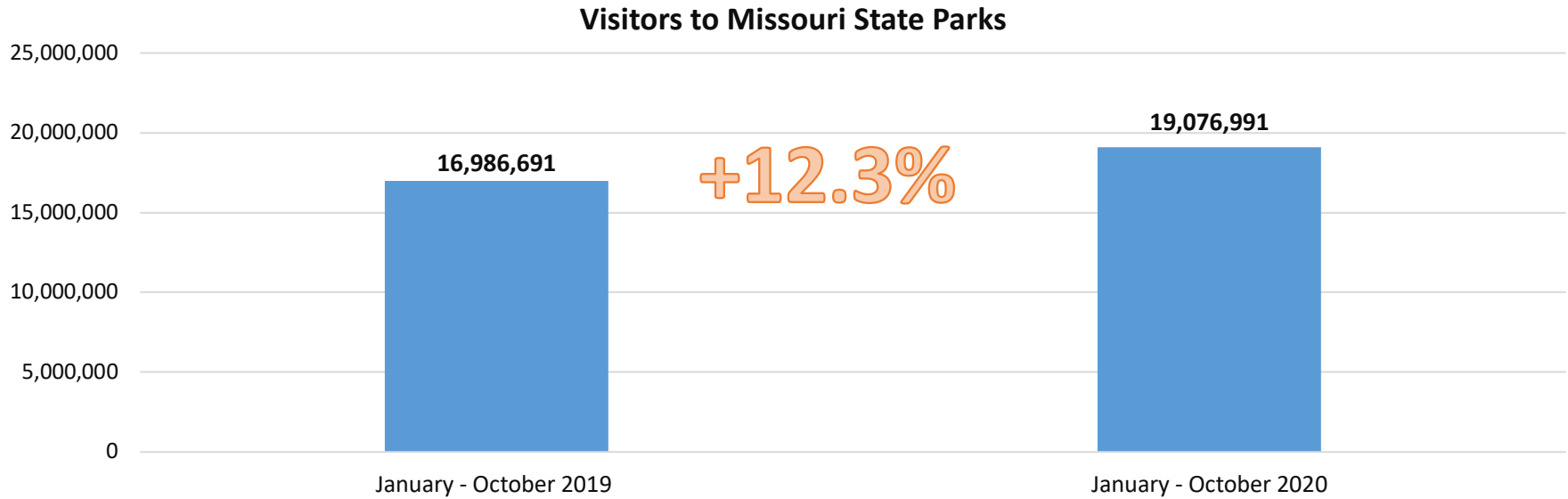
## Missouri State Parks – October Visitation

### ***Preliminary Totals for October:***

- Total Visitors – 2,107,605 (18.7% increase from 2019)
- Camping Units sold – 51,510 (27% increase from 2019)
- Lodging Units sold – 6,446 (14% increase from 2019)

### ***Preliminary year-to-date January to October:***

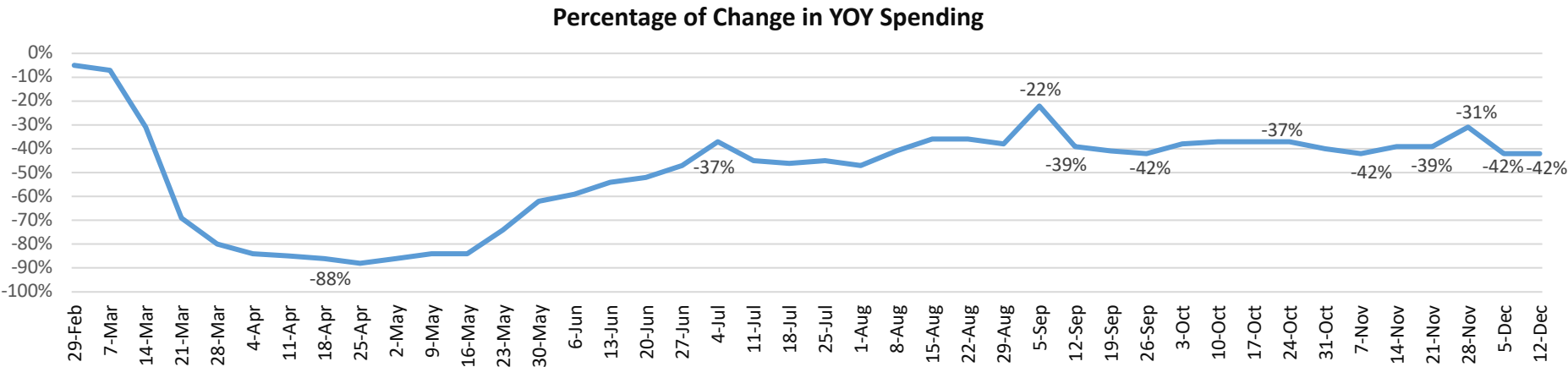
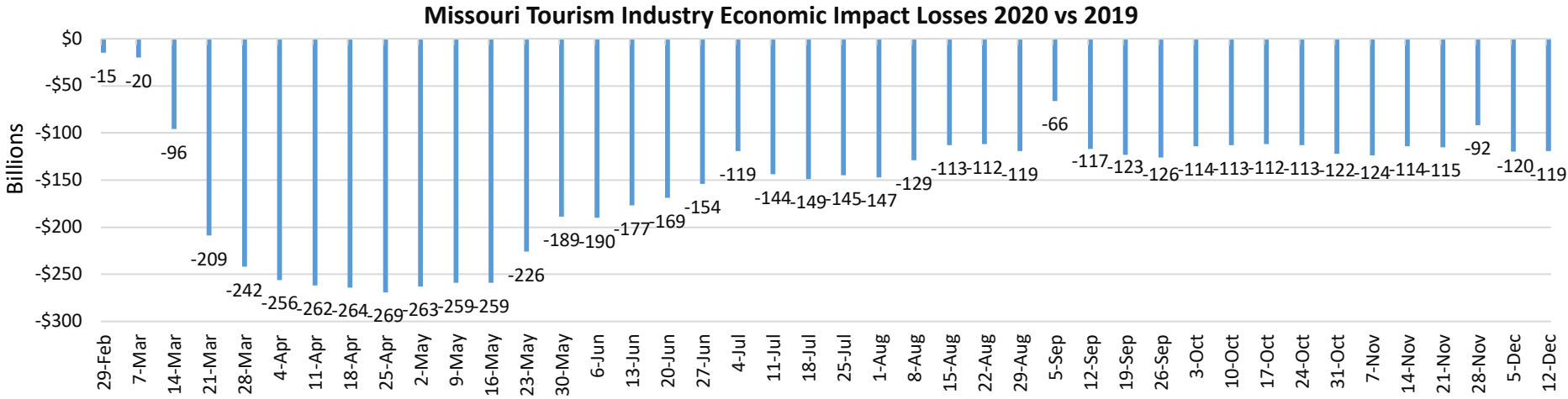
- Total visitors – 19,076,991 (12.3% increase from 2019)
- Camping units – 294,111 (2% decrease from 2019)
- Lodging units – 43,525 (3.8% decrease from 2019)



# MO Tourism Economic Impact Losses

Feb 29 thru Dec 12

## \$6.4 Billion Loss in Year-Over-Year Travel Spending

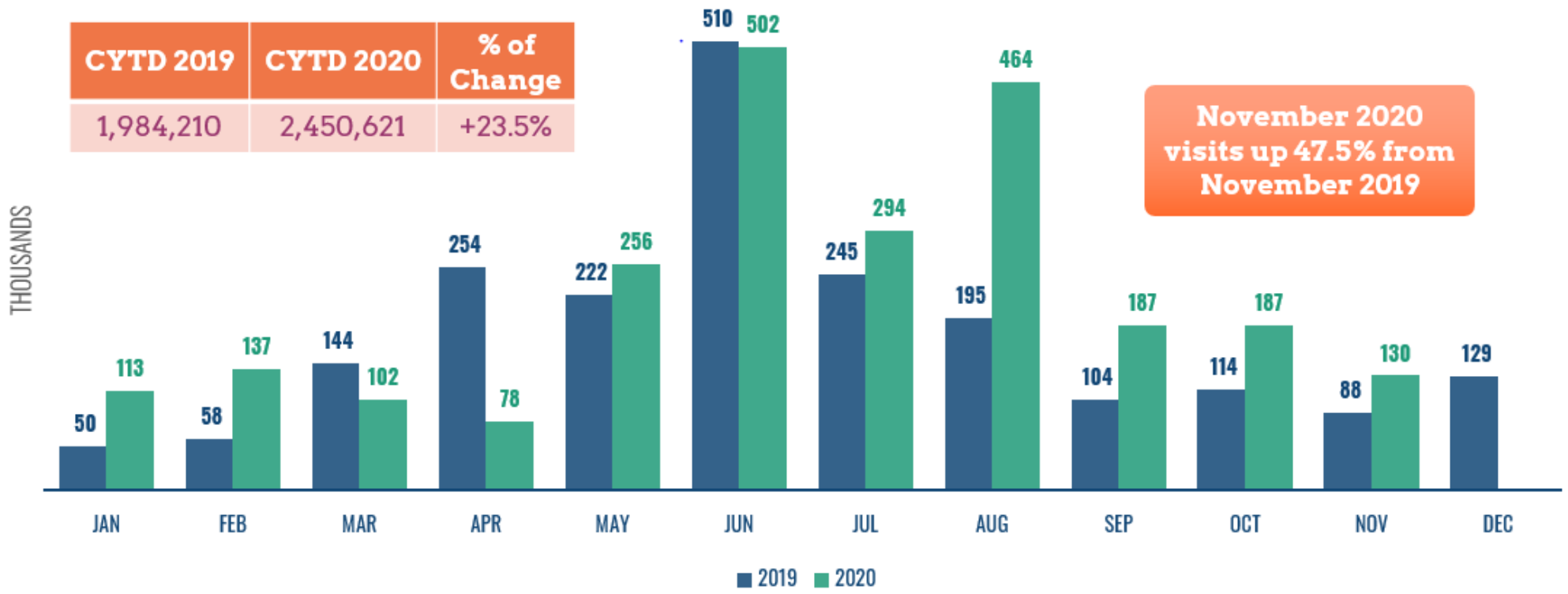


(Source: Tourism Economics, an Oxford Economics Company)



# Calendar Year Visits to VisitMO.com by Month

CYTD 2019	CYTD 2020	% of Change
1,984,210	2,450,621	+23.5%

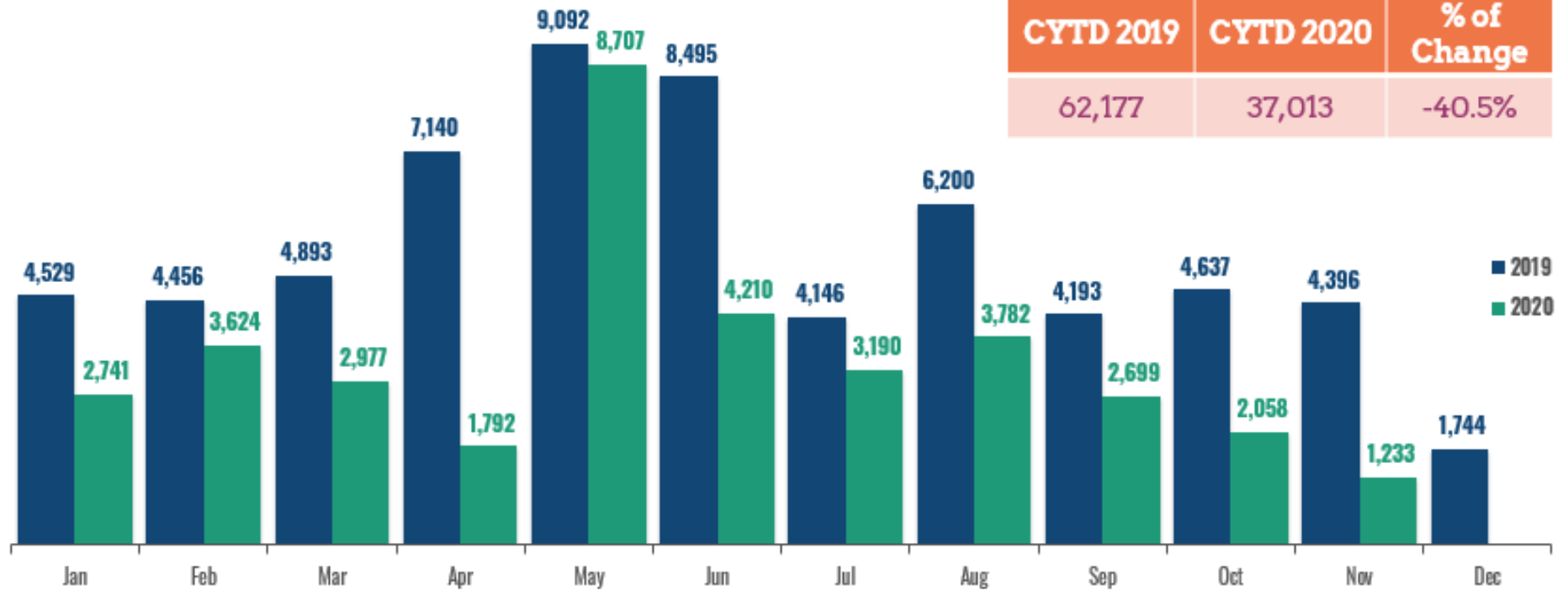


May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

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

# Fulfillment of Travel Guide Orders from All Sources

CYTD 2019	CYTD 2020	% of Change
62,177	37,013	-40.5%



Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.