

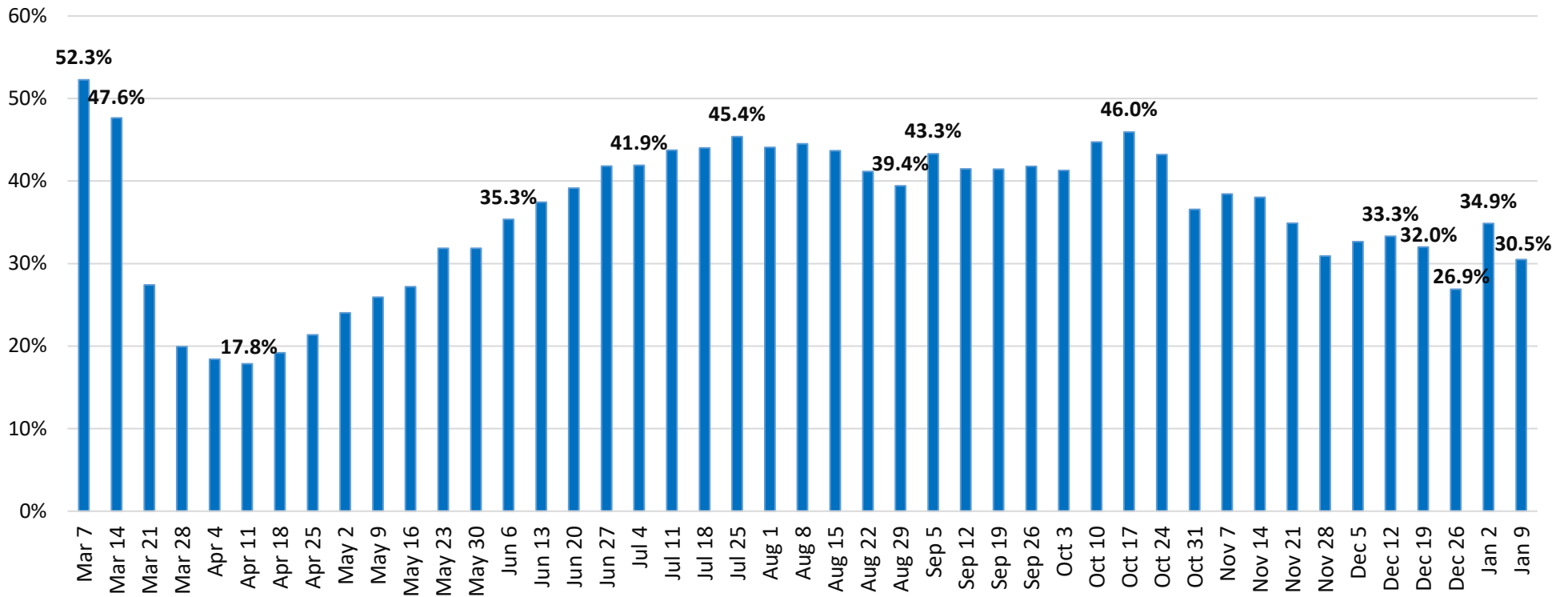
RESEARCH HIGHLIGHTS REPORT

January 15, 2021

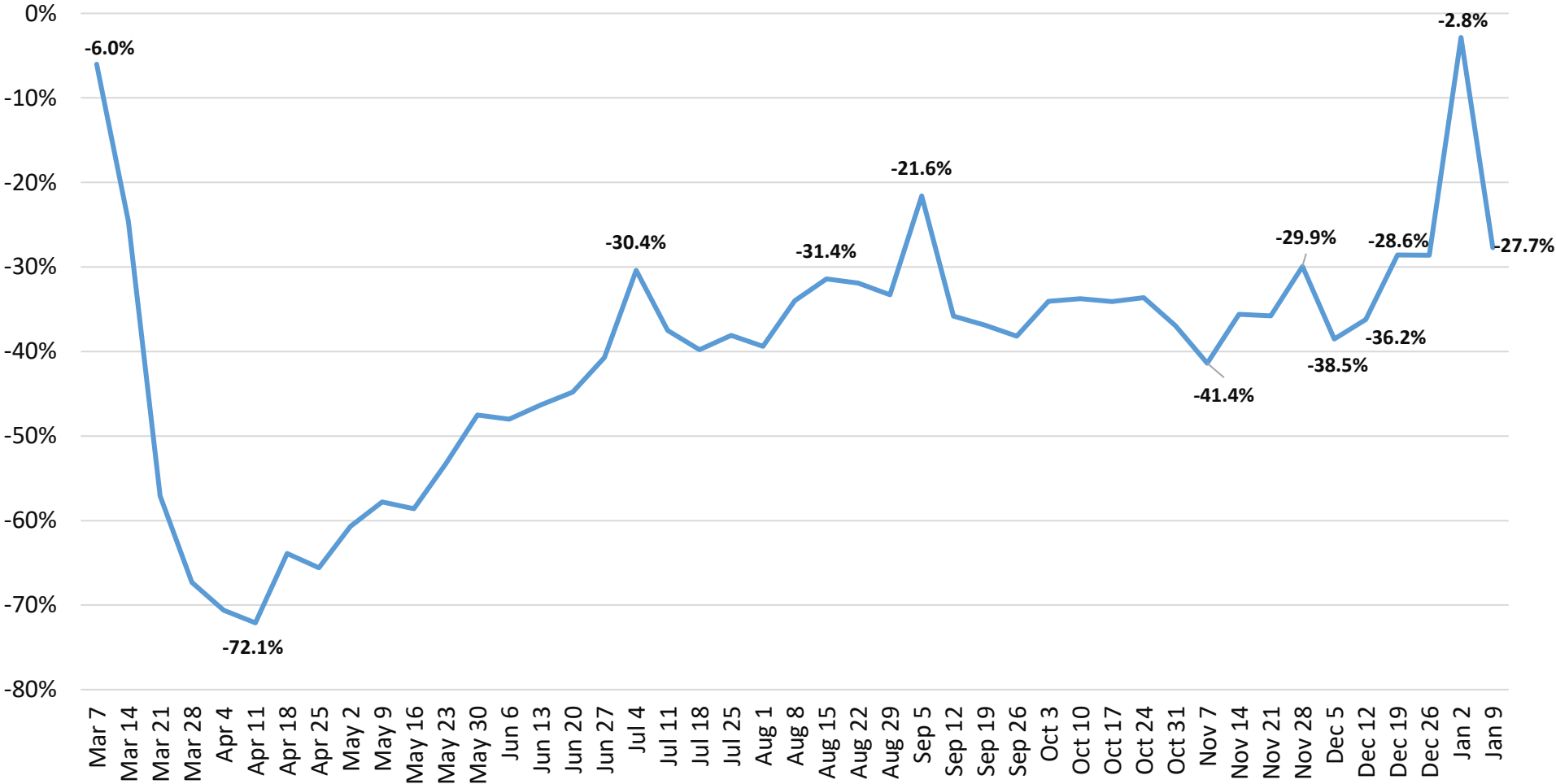
STR Lodging Data: (Source: STR Lodging Data) For trending information, please see slides below

- Occupancy statewide is 30.5% for the week ending January 9 -- down from last week's 34.9% occupancy.
- The Occupancy change compared to last year for this same week is down 27.7% versus a 2.8% decrease last week.
- Cumulatively, revenue from the Missouri lodging industry is down \$1.05 billion since March compared to the same period in the prior year.

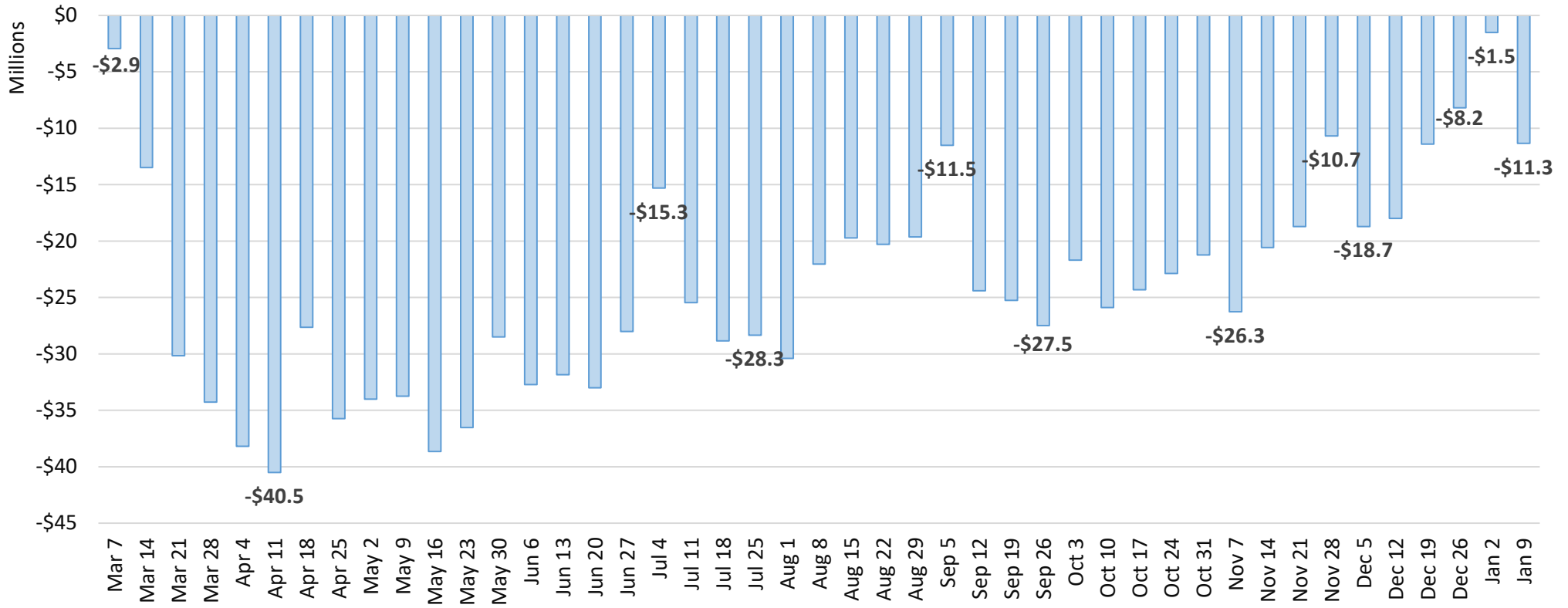
Missouri Occupancy



Occupancy % of Change from Prior Year



Lost Lodging Revenue Compared to Prior Year

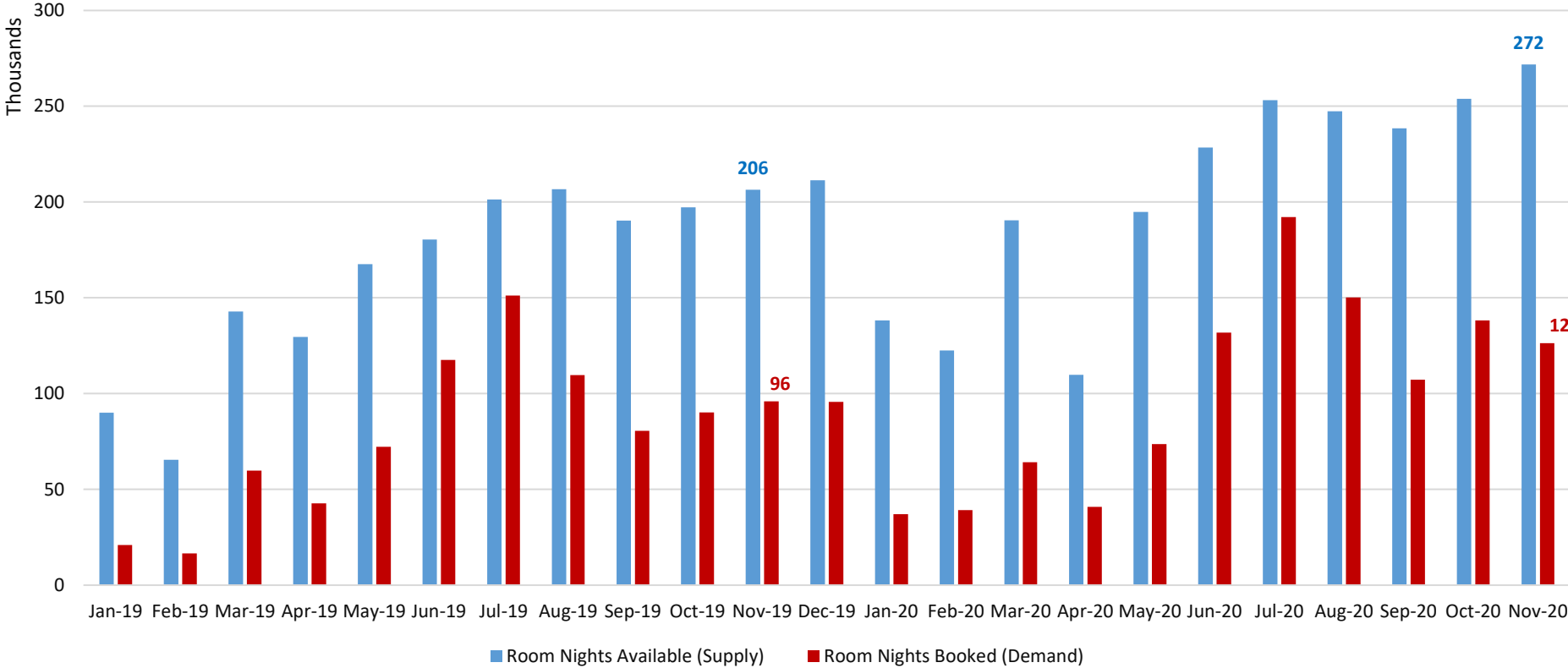


Shared Lodging (Source: AirDNA) Through November 2020

Featuring Branson

- Room Nights Available (Supply) in November increased by 31.7% from November 2019
- Room Nights Booked (Demand) in November increased by 31.6% from November 2019

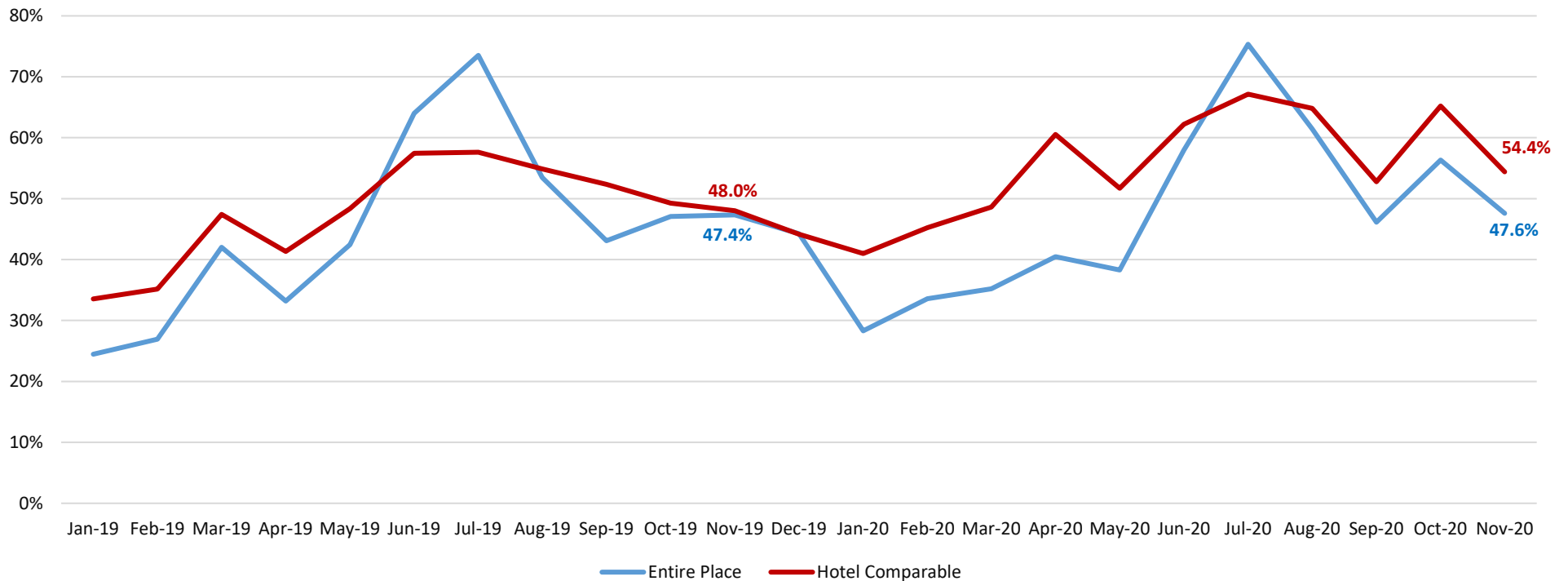
**Branson Short-Term Rentals Room Nights Available & Booked
(Thousands of Nights)**



Shared Lodging (Source: AirDNA) - Continued

- Occupancy for Entire Place rentals was 47.6% in November, an increase of 0.5% from November 2019
- The 2020 average Year-to-Date Occupancy for Entire Place rentals was 47.3%, a 4.6% increase from 2019 YTD
- Occupancy for Hotel Room Comparable rentals was 54.4%, an increase of 13.3% from November 2019
- The 2020 average YTD Occupancy for Hotel Comparable rentals was 55.8%, a 16.8% increase from 2019 YTD

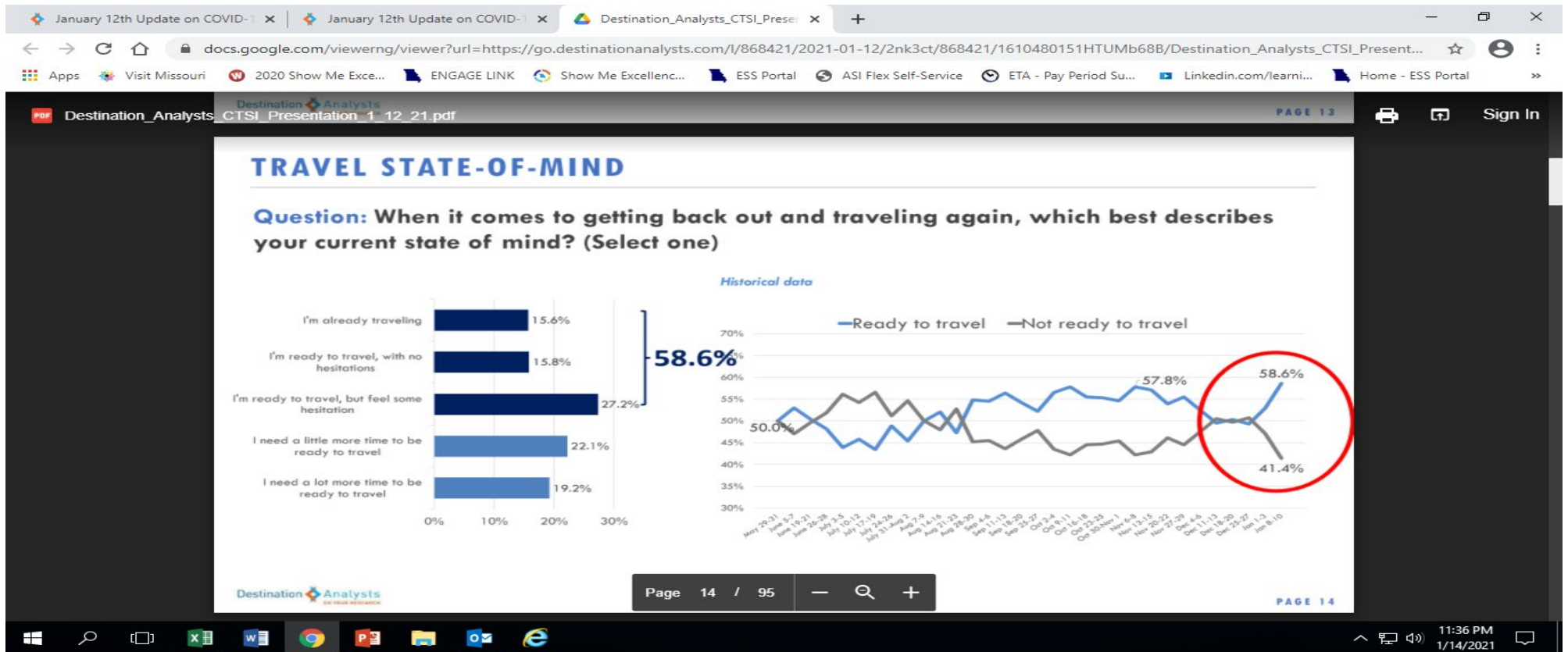
Branson Occupancy in Short-Term Rentals



SENTIMENT ANALYSIS RESEARCH (Source: Destination Analysts)

Key Findings to Know:

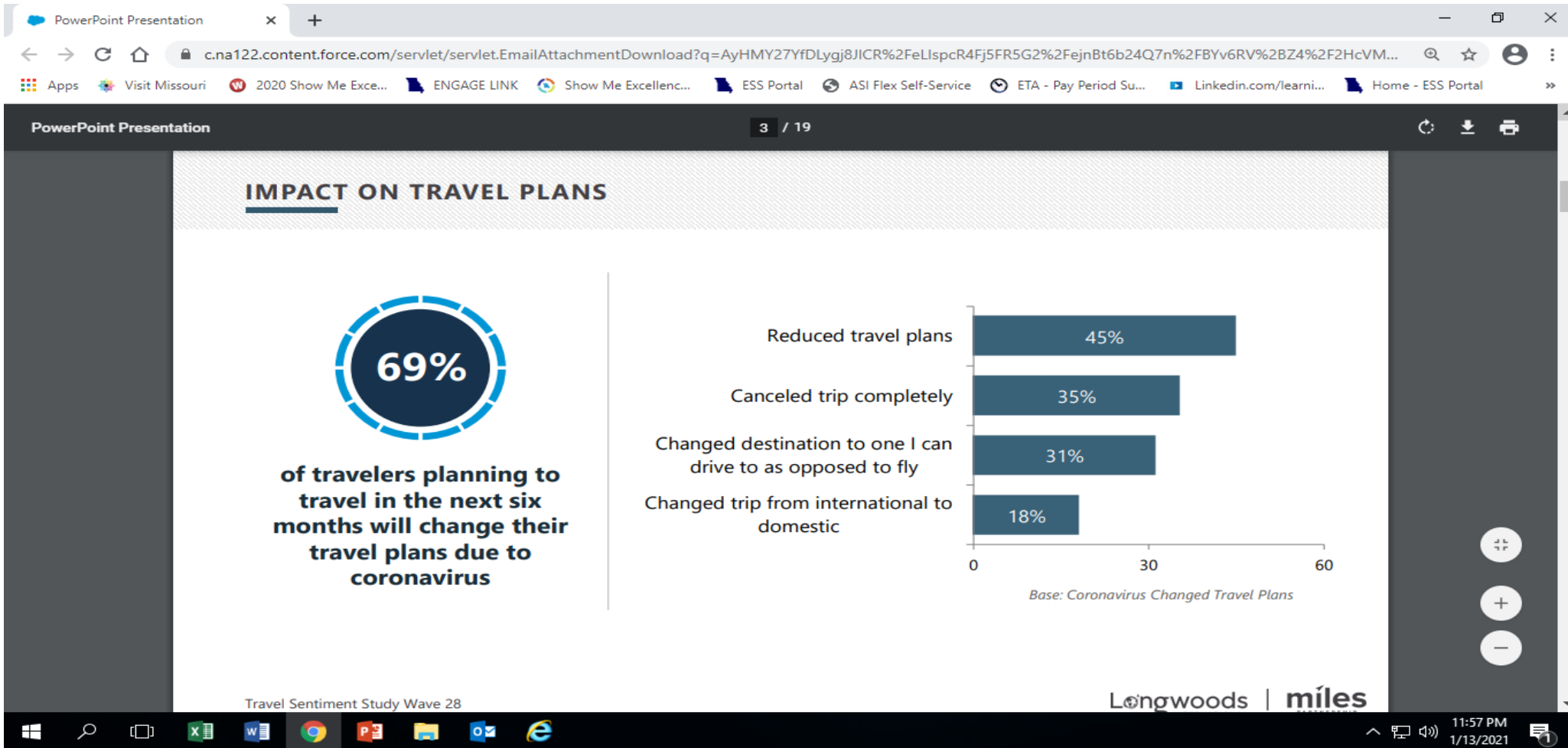
- =Americans' openness to travel inspiration (measuring 6.0 on a scale of 0-10)
- Excitement levels about travel in 2021 (6.1 on a scale of 0-10)
- The percent of American travelers who believe the COVID-19 vaccines are safe (67.8%)
- The percent of American travelers that will be getting vaccinated against COVID-19 (61.4%)
- The proportion of American travelers who are more optimistic about being able to safely travel in the next six months due to vaccine availability (56.4%)
- The percent of American travelers saying they have begun planning and booking trips specifically in anticipation of vaccines being available (33.7%)
- The percent of American travelers who say discounts and price cuts can motivate them to take a trip they had not previously considered (43.0%)
- The percent of American travelers that said they would be happy if they saw an advertisement promoting their community as a place for tourists to come visit when it is safe (40.3%)



SENTIMENT ANALYSIS RESEARCH (Source: Longwoods, Int.)

Key Findings to Know: Lots of Silver Linings to start the New Year!

1. "51% of American Travelers report that their first trip this year will be to visit friends and relatives! (The vast majority of this will be by car.)"
2. Only 9% of American Travelers indicated that they do not currently have travel plans for 2021.
3. 63% of American Travelers have plans to travel in the next six months, up from 57% (+6%) back in mid-December.
4. Only 35% have completely cancelled upcoming travel plans due to the pandemic, down from 41% (-6%) in mid-December.
5. 41% of Americans now support opening up their community to visitors, up from 32% (+9%) in early December."



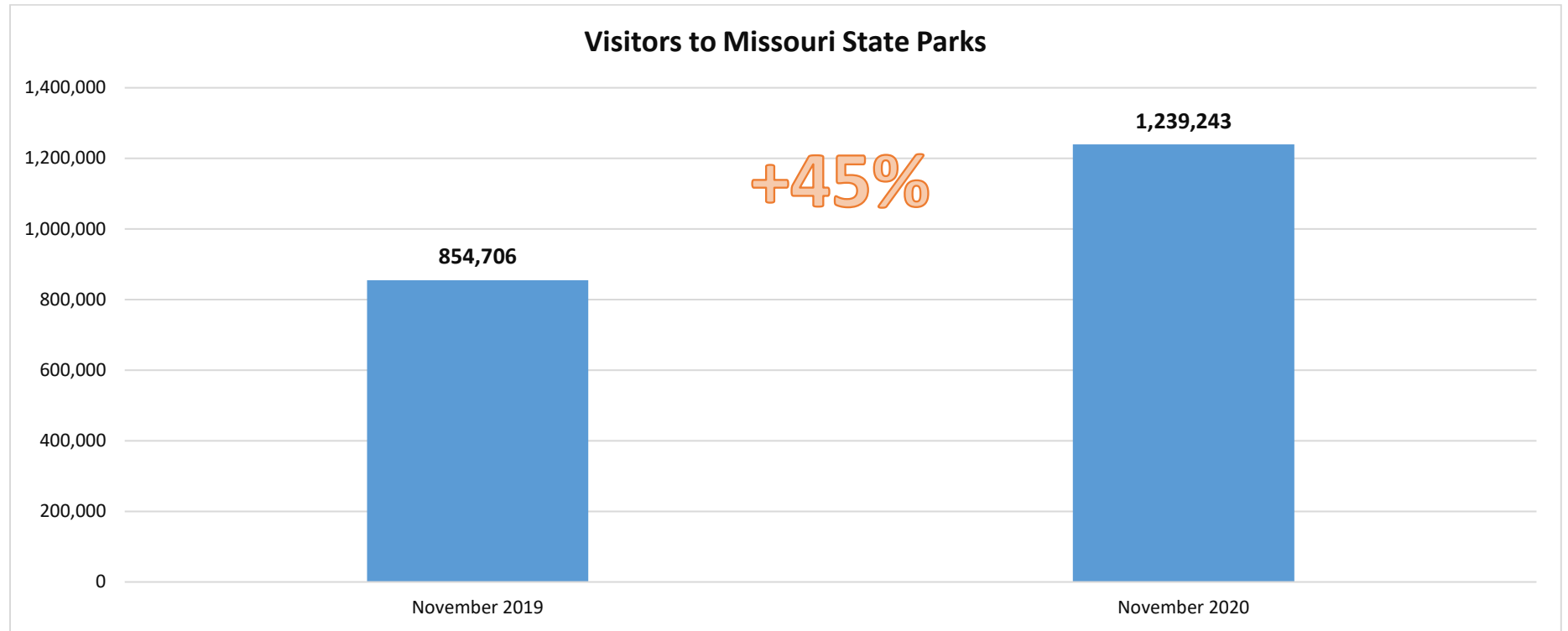
Missouri State Parks – November Visitation

Preliminary Totals for November:

- Total Visitors – 1,239,243 (45% increase from 2019)
- Camping Units sold – 12,563 (86% increase from 2019)
- Lodging Units sold – 1,807 (9% increase from 2019)

Preliminary year-to-date January to November:

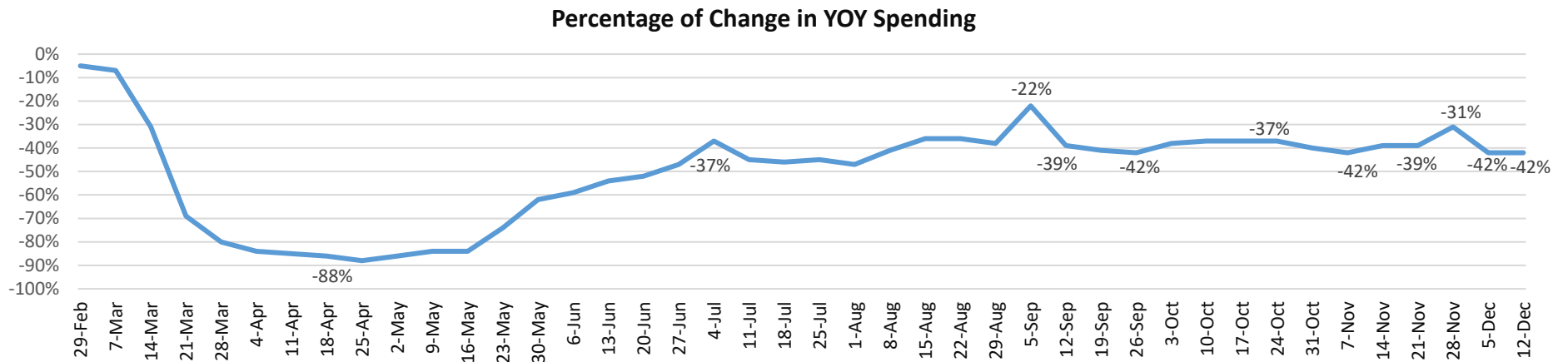
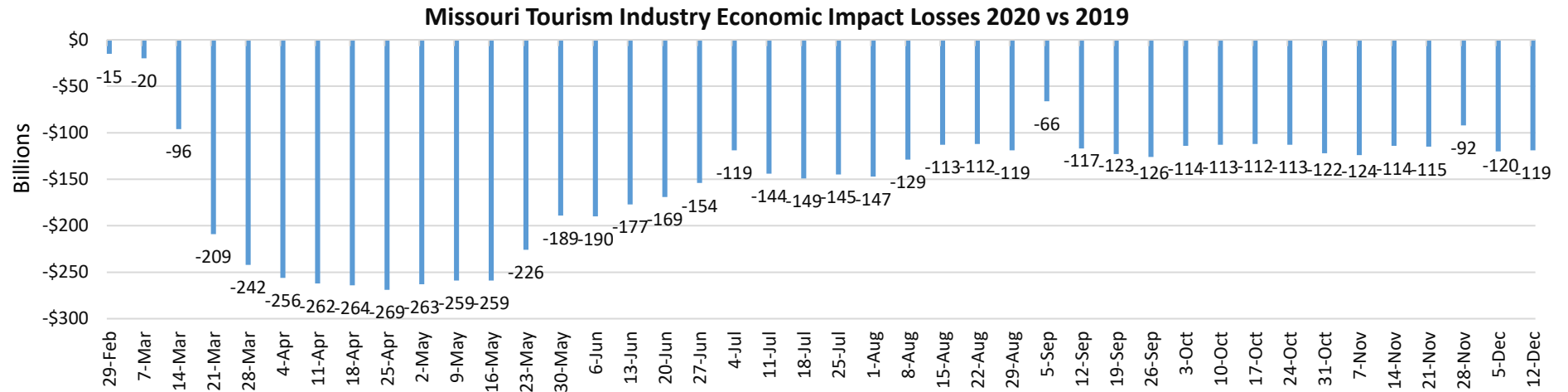
- Total visitors – 20,316,234 (13.9% increase from 2019)
- Camping units – 306,674 (0.4% increase from 2019)
- Lodging units – 45,332 (3.3% decrease from 2019)



MO Tourism Economic Impact Losses

Feb 29 thru Dec 12

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



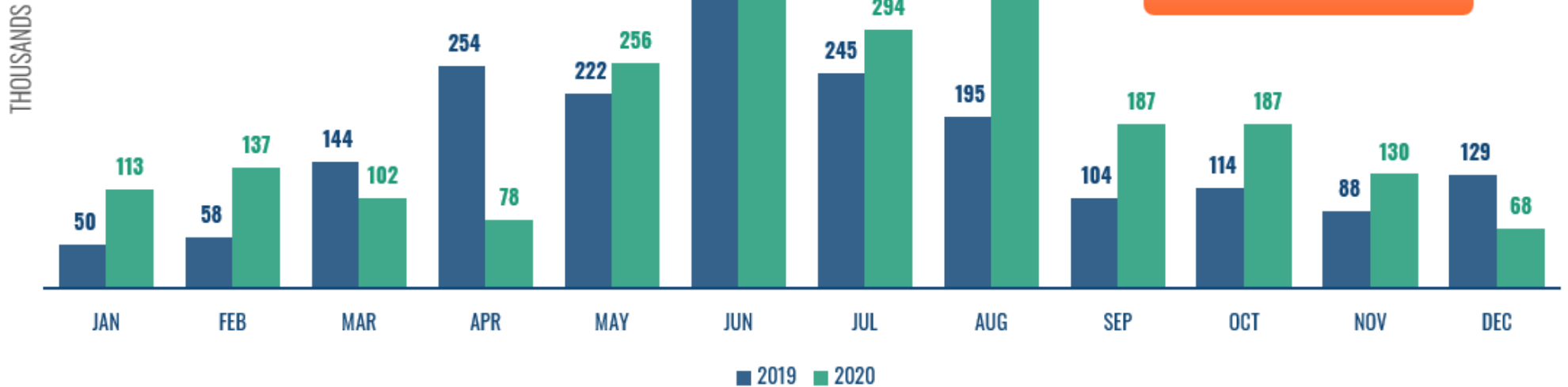
(Source: Tourism Economics, an Oxford Economics Company)



Calendar Year Visits to VisitMO.com by Month

CYTD 2019	CYTD 2020	% of Change
2,113,356	2,518,803	+19.2%

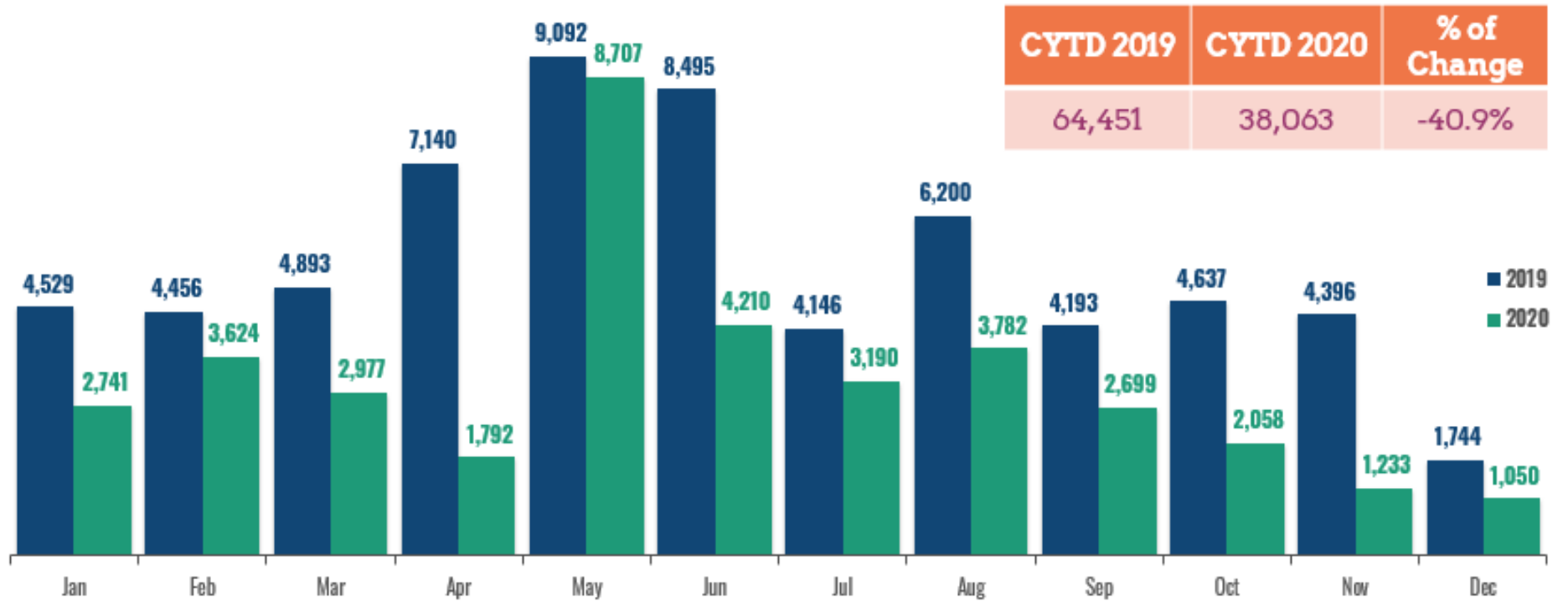
December 2020 visits down 47.2% from December 2019



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.

Fulfillment of Travel Guide Orders from All Sources



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.