MISSOURI DIVISION OF TOURISM

November Missouri Travel Barometer

(Data available as of 12/14/20)

Missouri Travel Barometer

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The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29

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STR Lodging Trends – Week Ended November 28, 2020

OCCUPANCY
was down
29.9%
as compared to the same week in 2019

STATEWIDE DEMAND
DECREASED
29.4%

ADR
(Average Daily Room Rate)
DECREASED
11.1%

RevPAR
(Revenue per Available Room)
DECREASED
37.7%

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29

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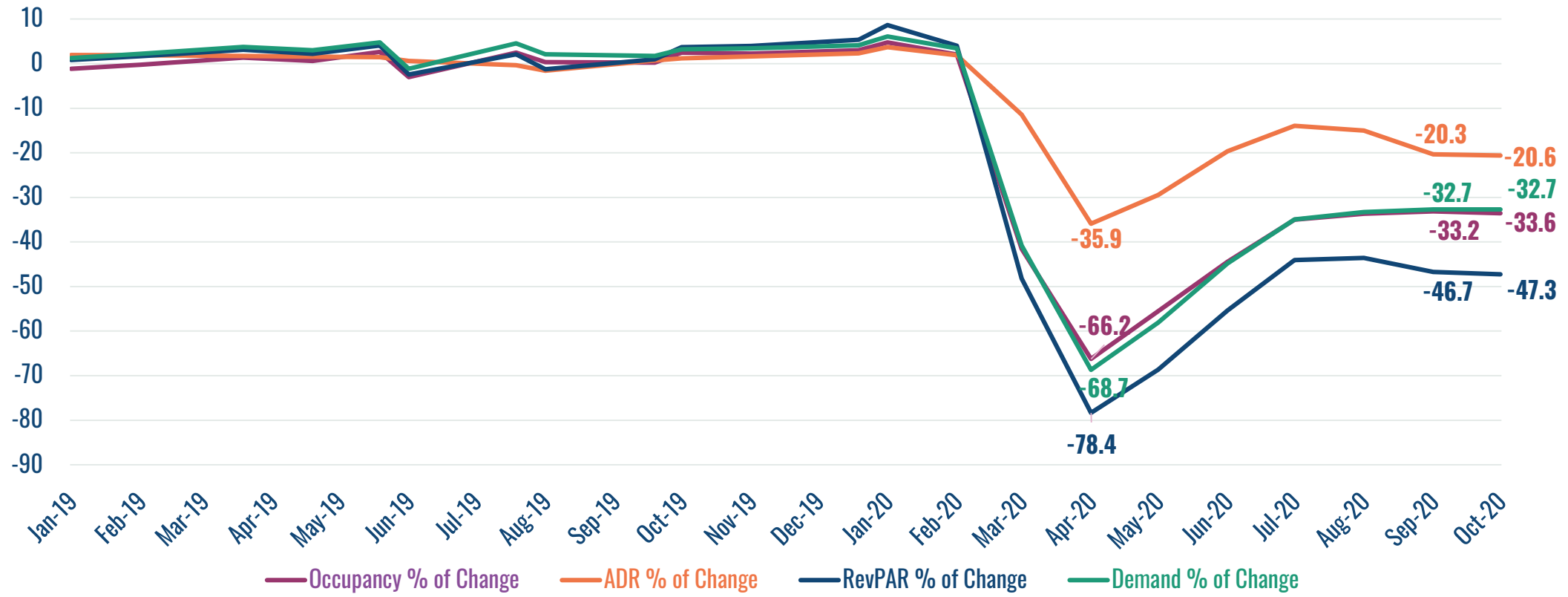
STR Monthly Lodging Trends
Percentage of Change



Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29

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AirDNA Short-Term Rental Trends for Hotel Comparable Rooms

January – October 2020 Compared to 2019

OCCUPANCY
was up
3.1%
as compared to the time period in 2019

STATEWIDE DEMAND
INCREASED
18.7%

ADR
(Average Daily Room Rate)
INCREASED
11.9%

RevPAR
(Revenue per Available Room)
INCREASED
16.4%

AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29

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AirDNA Short-Term Rental Trends for Entire Place Rentals

January – October 2020 Compared to 2019

OCCUPANCY
was up
4.4%
as compared to
the time period in
2019

STATEWIDE DEMAND
INCREASED
21.1%

ADR
(Average Daily Room Rate)
INCREASED
7.2%

RevPAR
(Revenue per Available Room)
INCREASED
13.4%

AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29

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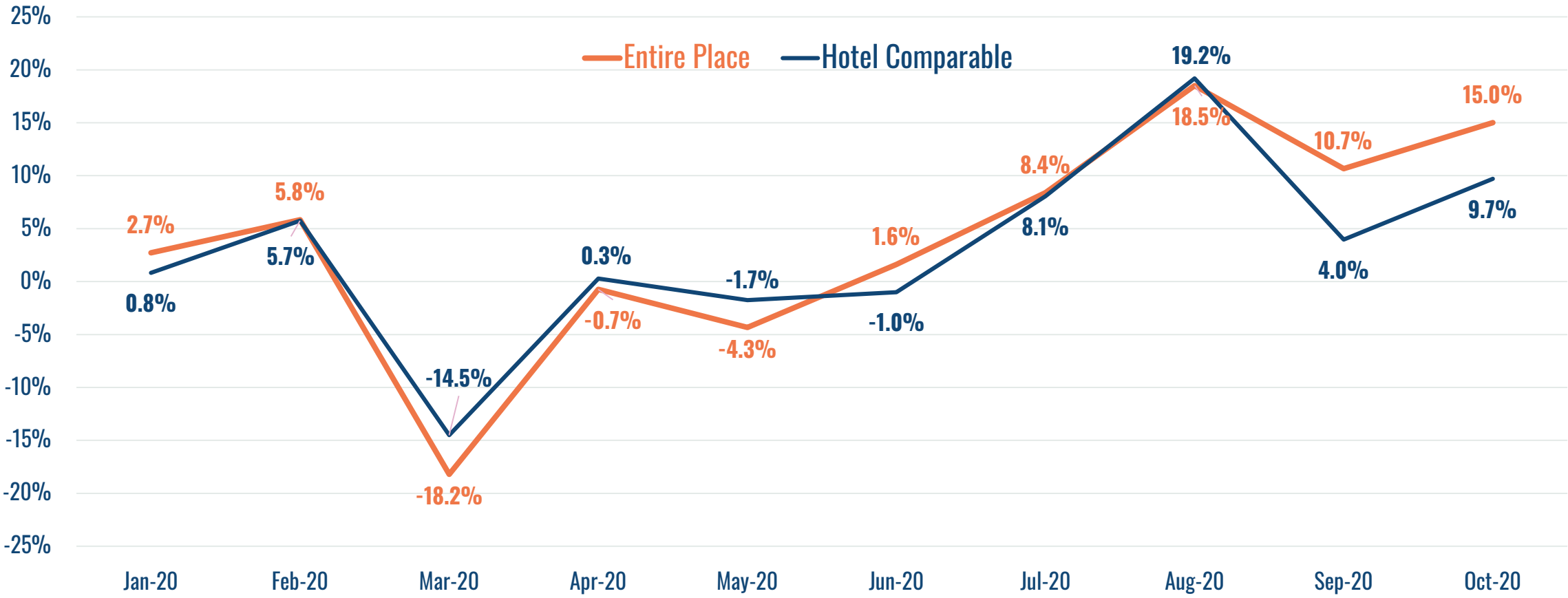
AirDNA Short-Term Rentals Occupancy% of Change from Prior Year



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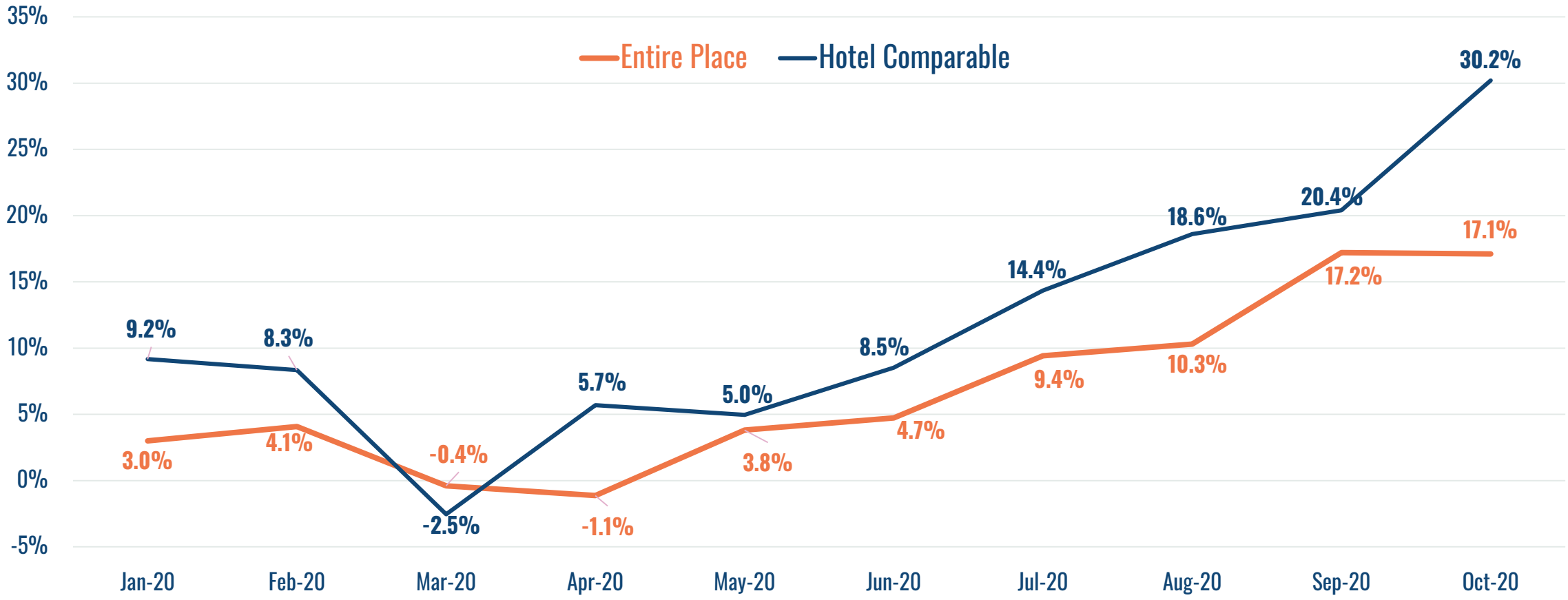
AirDNA Short-Term Rentals ADR % of Change from Prior Year



AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

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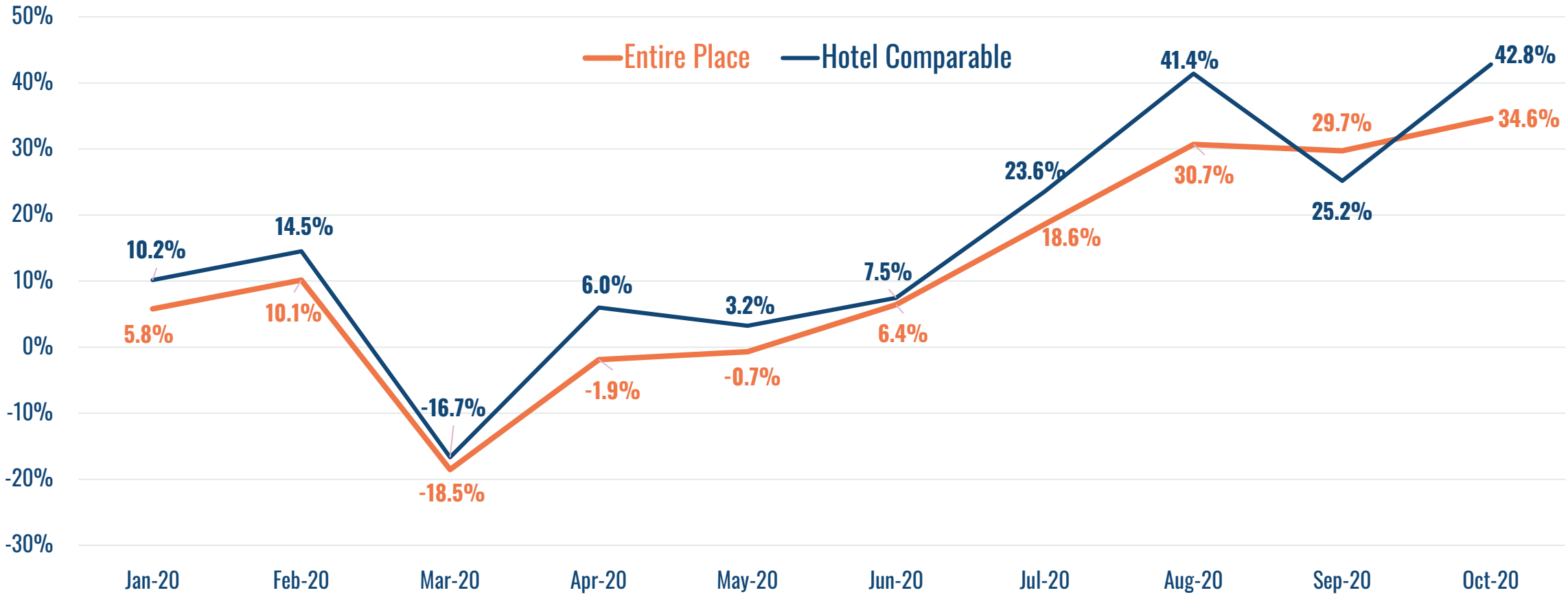
AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

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

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NAICS Tourism Business Sales through September 2020

September 2020 saw a

-18.7%

($234.3 million)

DECREASE

in tourism-related sales revenue compared to September 2019

For FYTD21, preliminary reports for Jul-Sep indicate a

-17.5%

($0.66 billion)

DECREASE

in tourism-related sales revenue

For CYTD20, preliminary reports for Jan-Sep show a

-22.4%

($2.4 billion)

DECREASE

in tourism-related sales revenue

Missouri Travel Barometer

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

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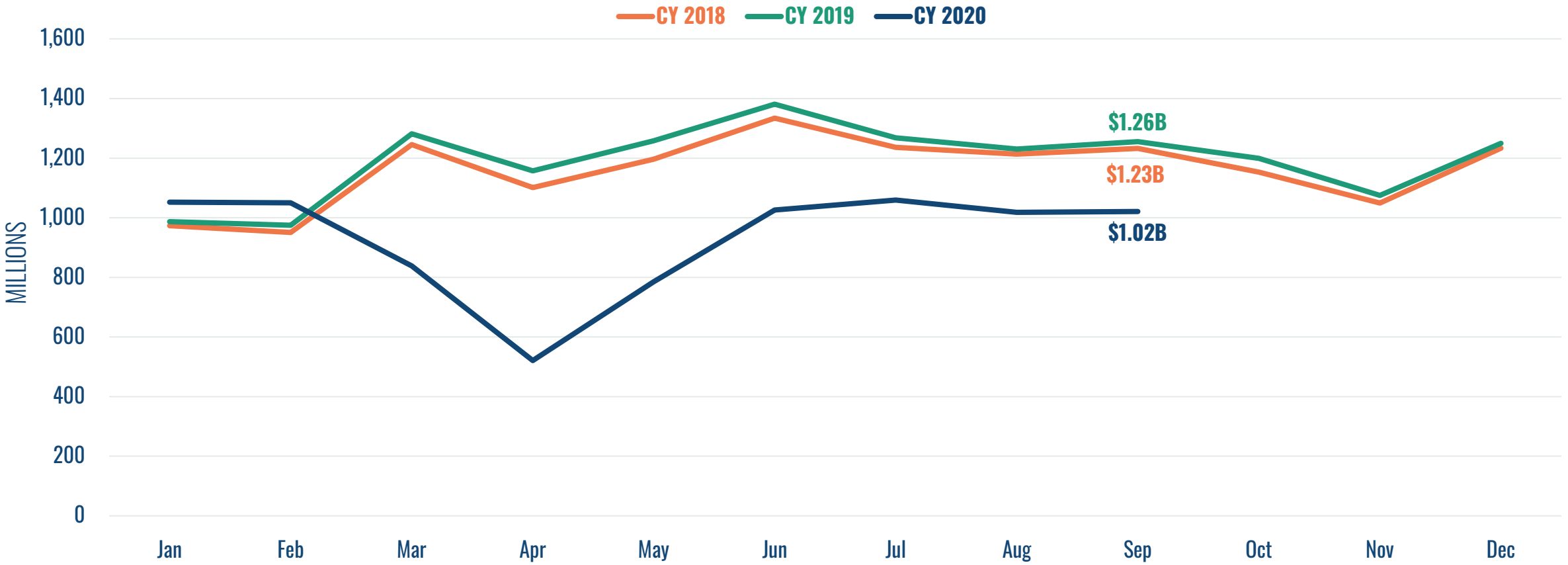
CY Sales Revenue from Tourism-Related NAICS



Missouri Travel Barometer

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

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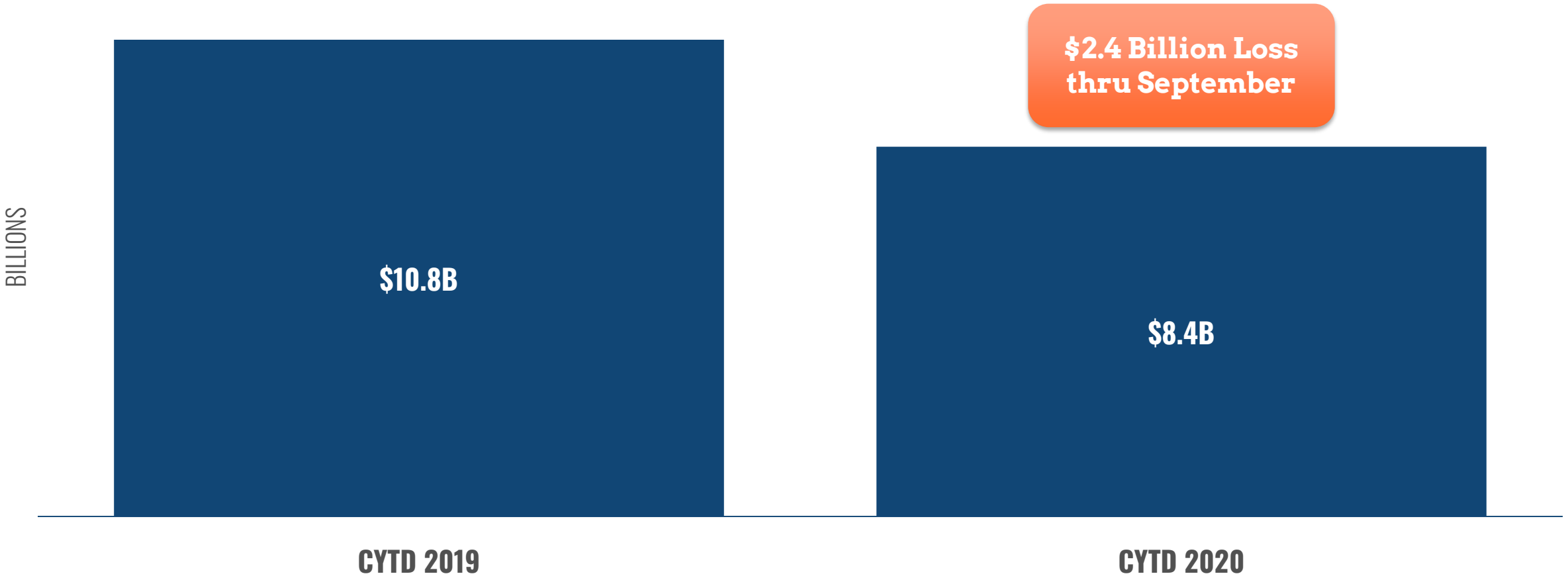
CYTD January - September Sales Revenue from Tourism-Related NAICS



Missouri Travel Barometer

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

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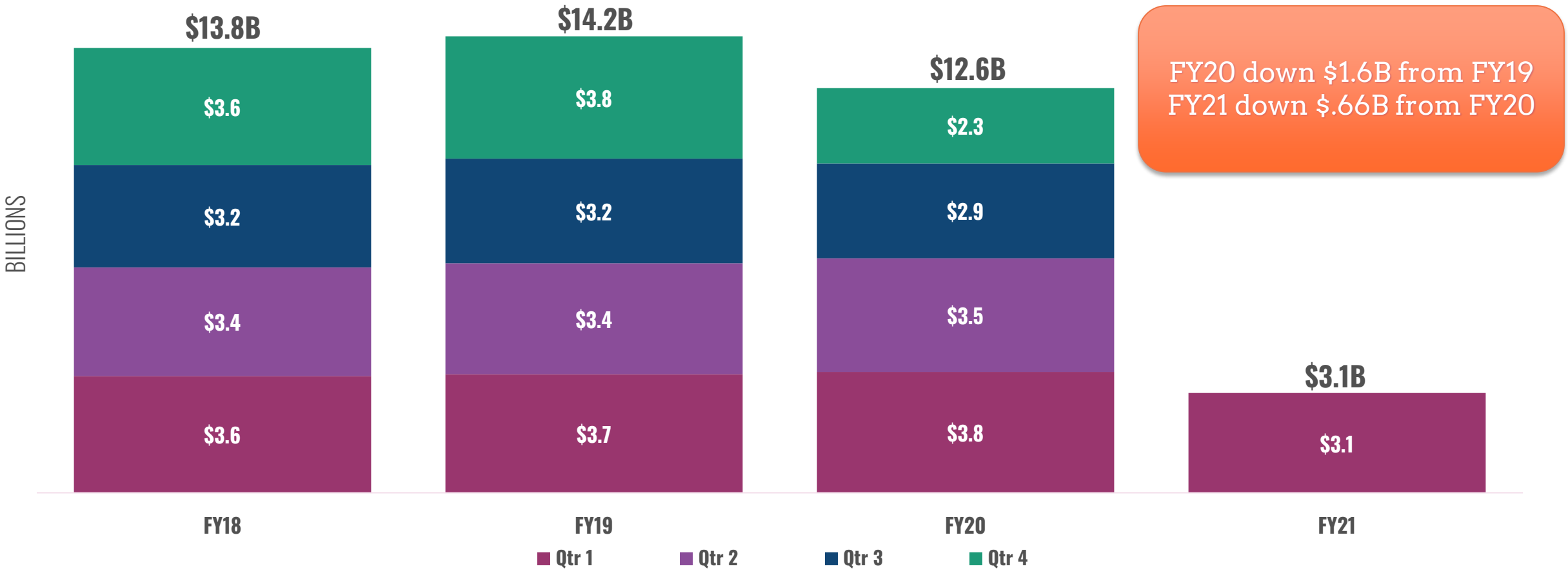
FY Sales Revenue from Tourism-Related NAICS



FY20 down $1.6B from FY19
FY21 down $.66B from FY20

Missouri Travel Barometer

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

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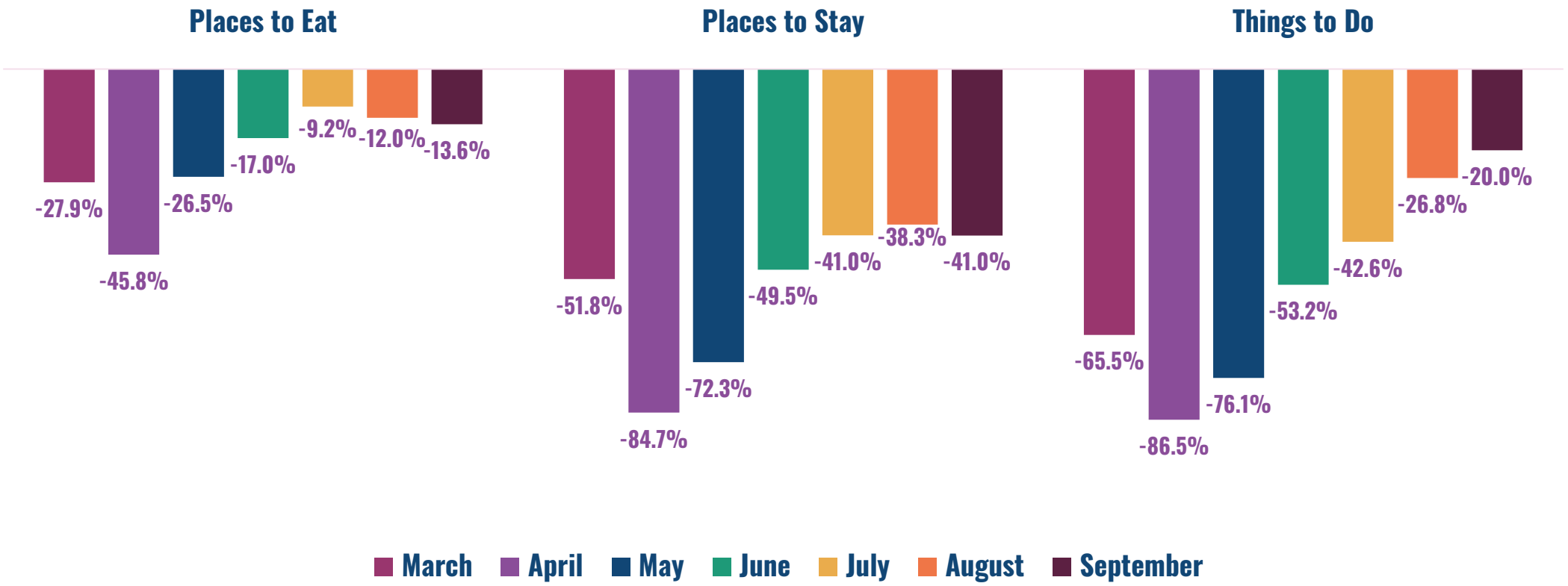
NAICS Tourism Business Sales

Change in March - September 2020 Compared to March - September 2019



Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit responses in the early part of 2020

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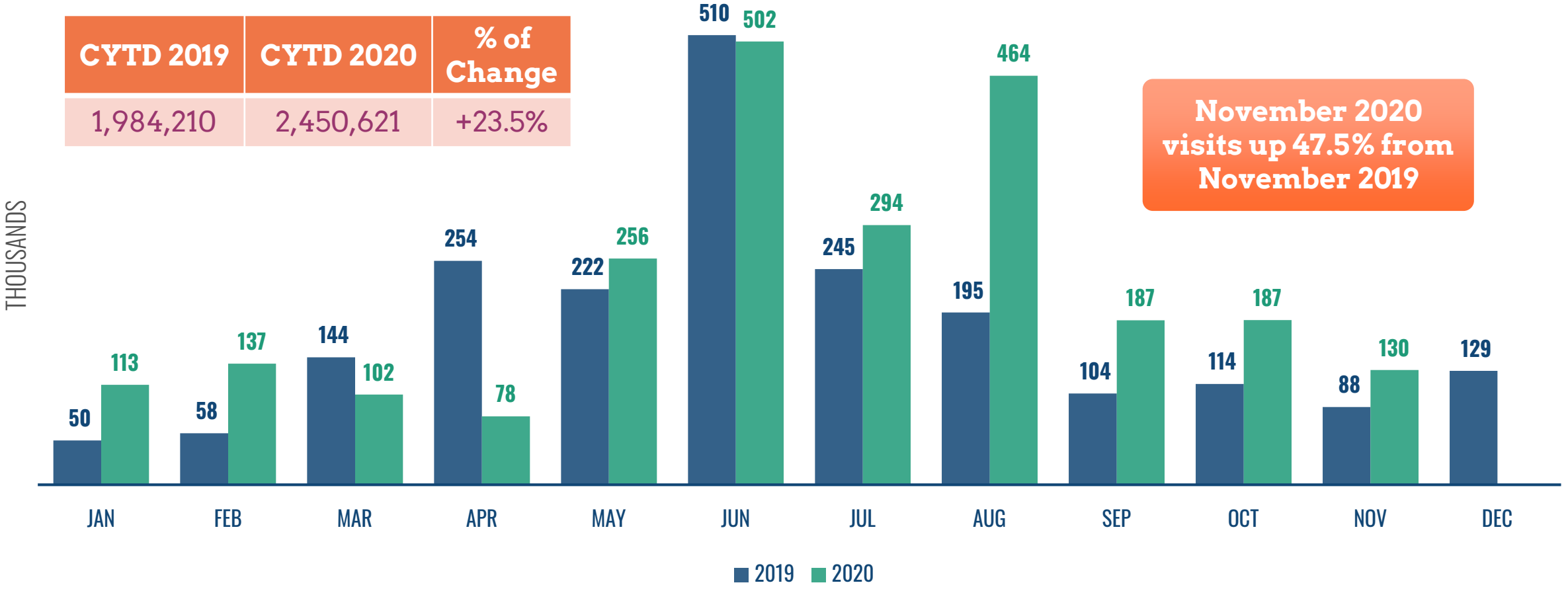
Calendar Year Visits to VisitMO.com by Month

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



November 2020 visits up 47.5% from November 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.

Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit responses in the early part of 2020

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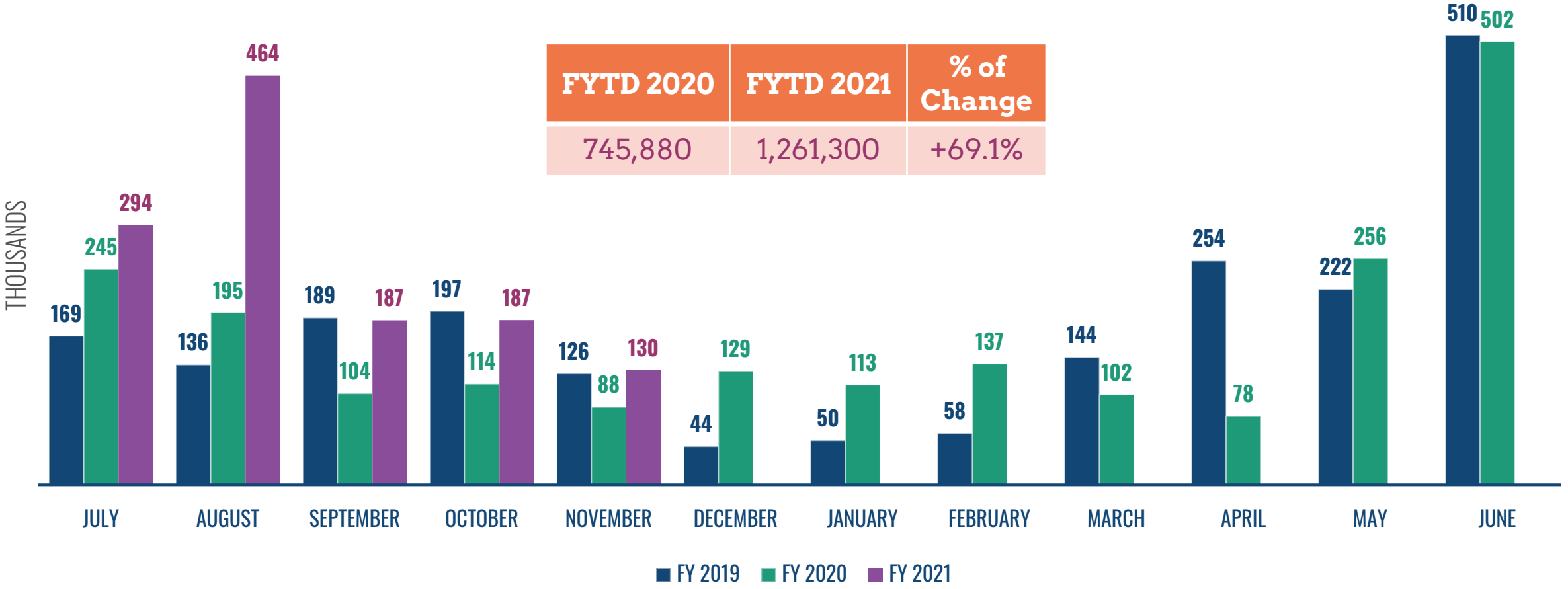
Fiscal Year Visits to VisitMO.com by Month

FYTD 2020	FYTD 2021	% of Change
745,880	1,261,300	+69.1%



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.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29

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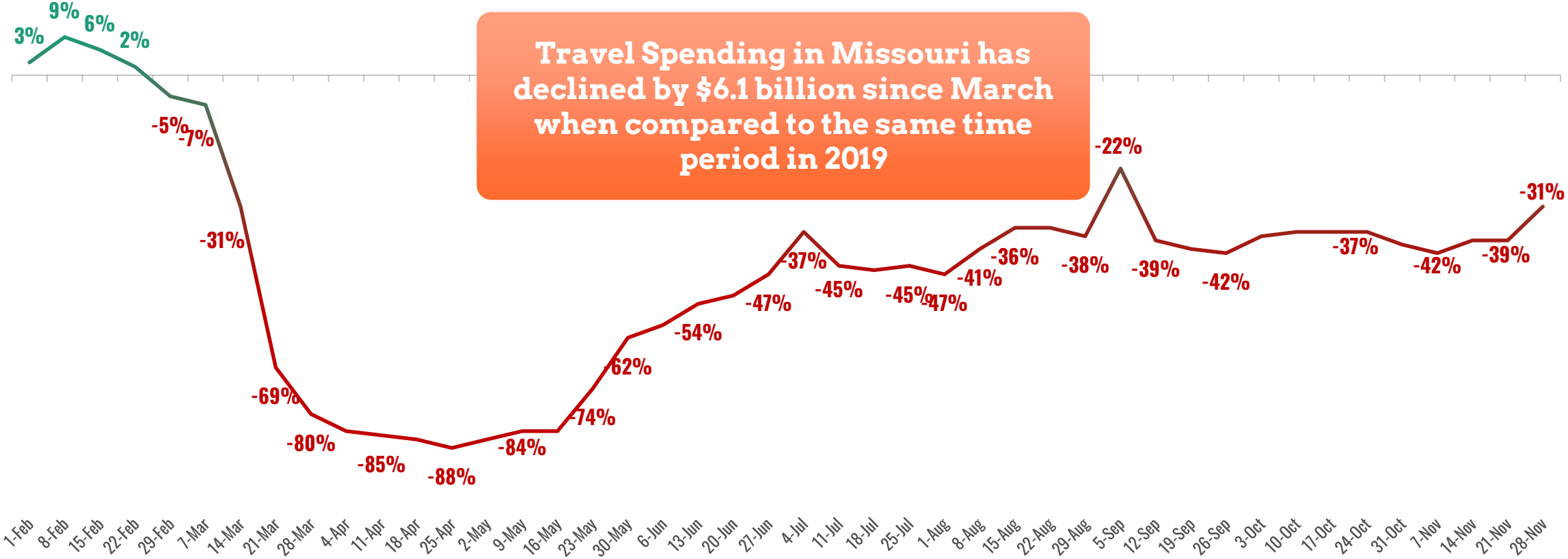
Economic Impact

Year-Over-Year % Change in Weekly Travel Spending in Missouri



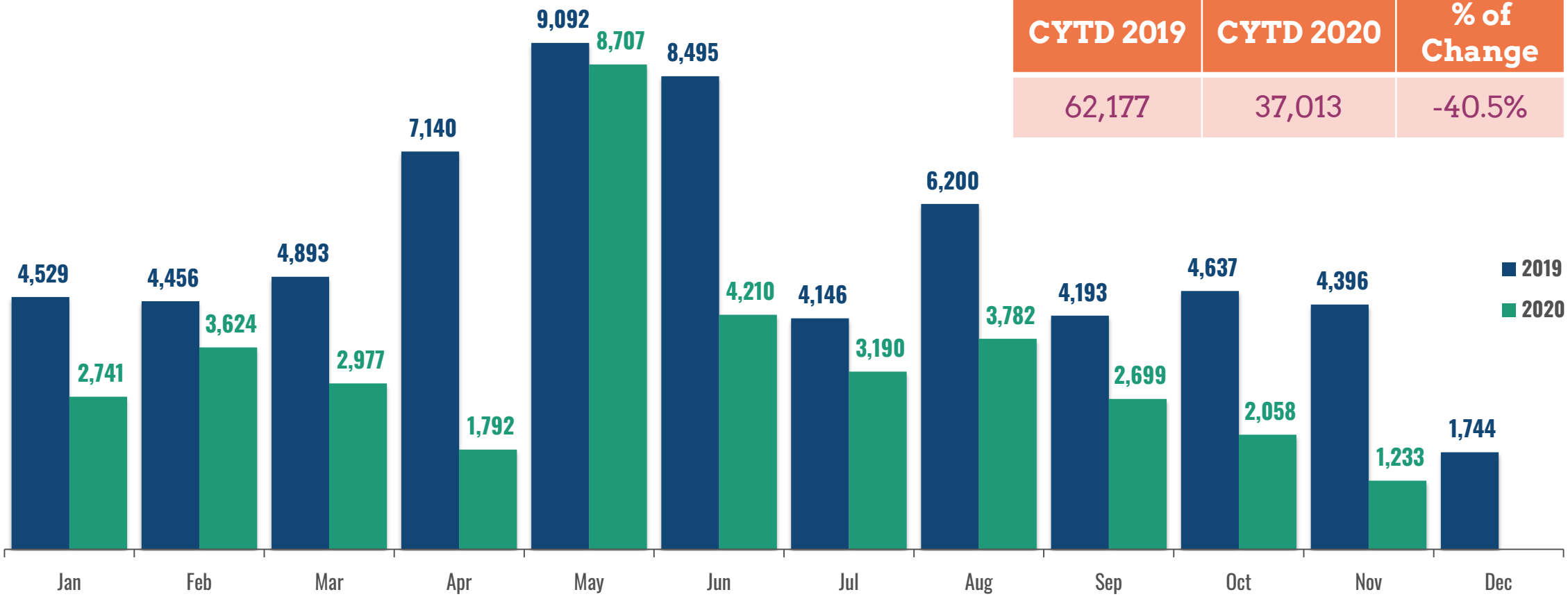
Source: Tourism Economics – an Oxford Economics Company

Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

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.

Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

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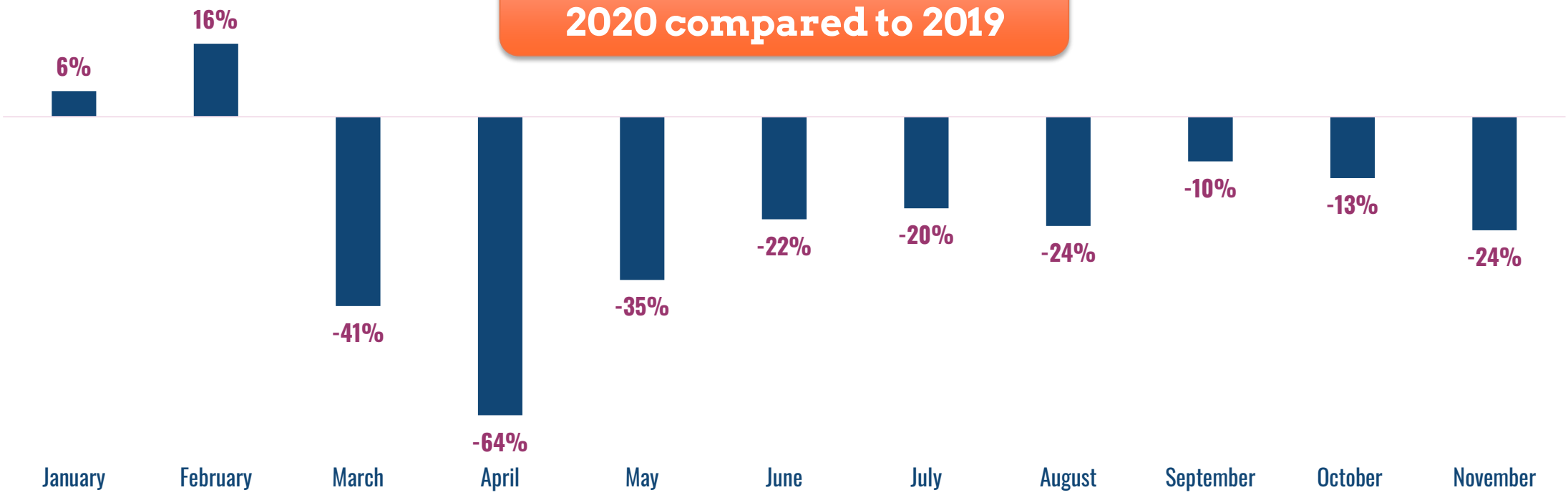
Road Trips to Missouri as Reported by Arrivalist

% of Change in Road Trips to MO by Month
2020 Compared to 2019

-23.5% during Jan-Nov 2020 compared to 2019



Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

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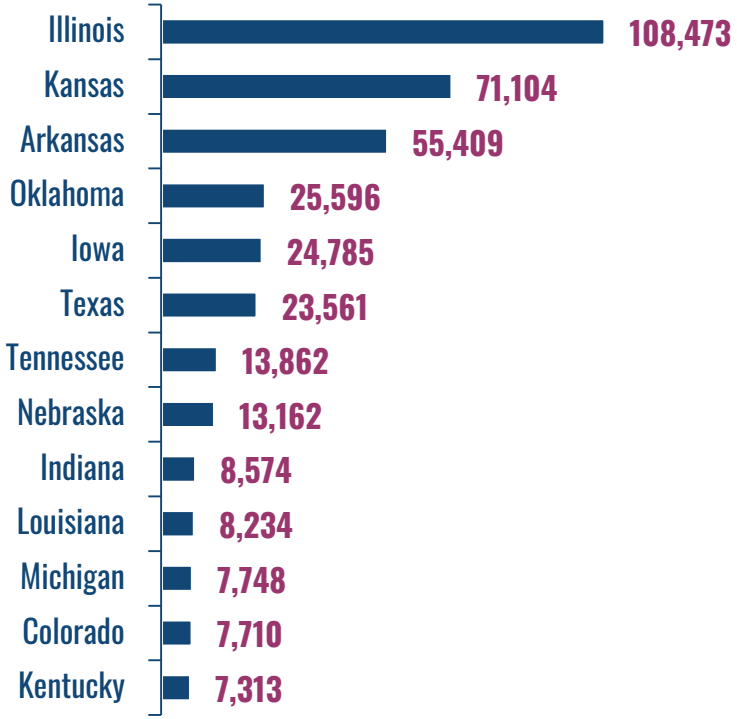
November Road Trips to Missouri as Reported by Arrivalist

Top Nearby States for November Road Trips to MO



Top States that Increased Road Trips to MO Nov 2020 % of Increase over Nov 2019

Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

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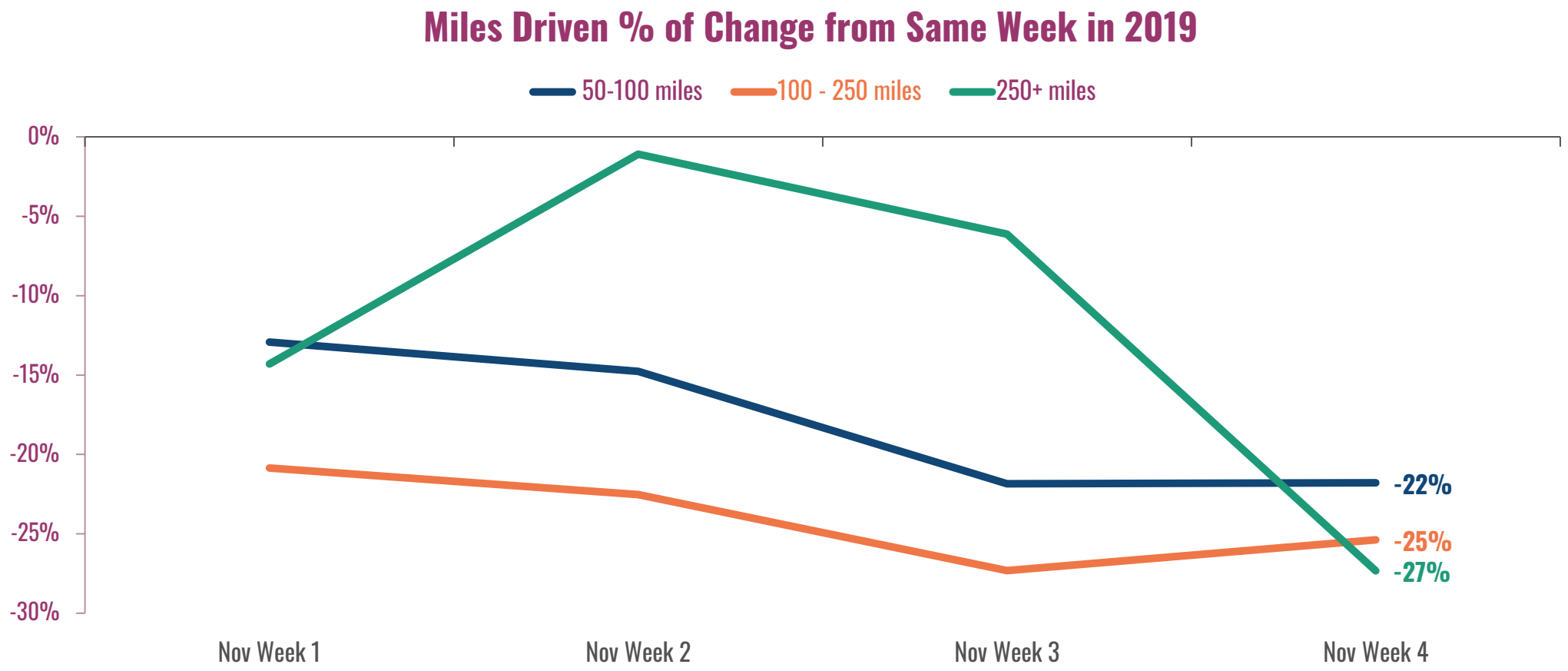
Road Trips to Missouri as Reported by Arrivalist



Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

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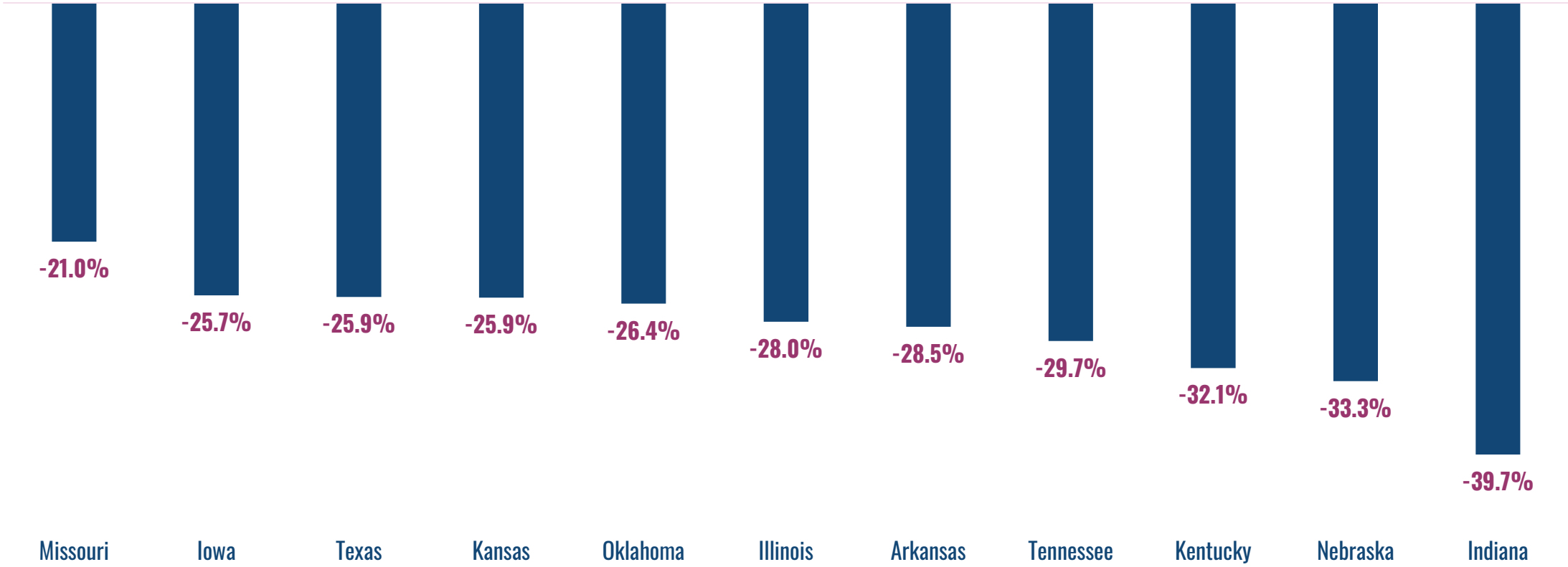
January – November Road Trips to Missouri as Reported by Arrivalist

% of Change in Road Trips to MO by Nearby States
2020 Compared to 2019



Missouri Travel Barometer

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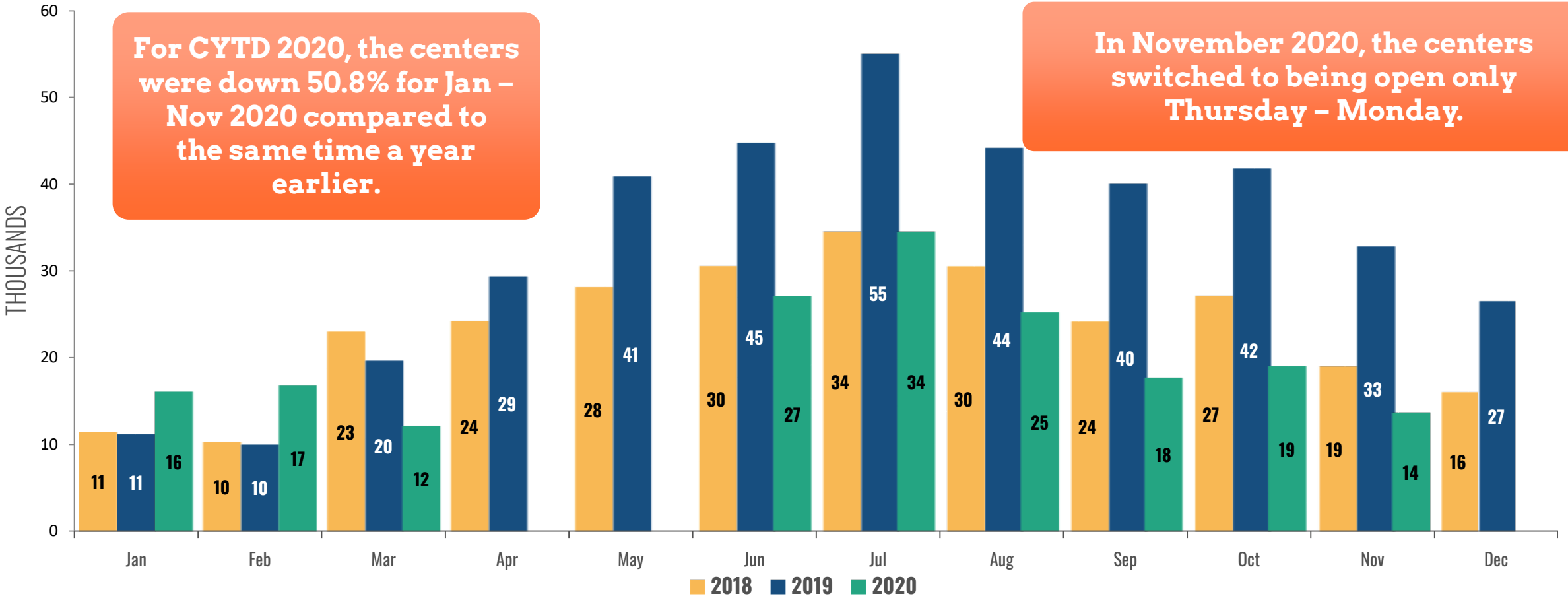
Welcome Center Visits: 2020 Calendar Year to Date through November

For CYTD 2020, the centers were down 50.8% for Jan – Nov 2020 compared to the same time a year earlier.

In November 2020, the centers switched to being open only Thursday – Monday.



Notes: The Welcome Centers were closed March 18th – May 31st due to social distancing orders. The Centers started closing on weekends on 8/16/2020. *(The centers were not open on weekends 2019 from Jan – Mar). The Kansas City Welcome Center closed at the end of September, and the Hannibal and St. Louis Centers closed at the end of October.*

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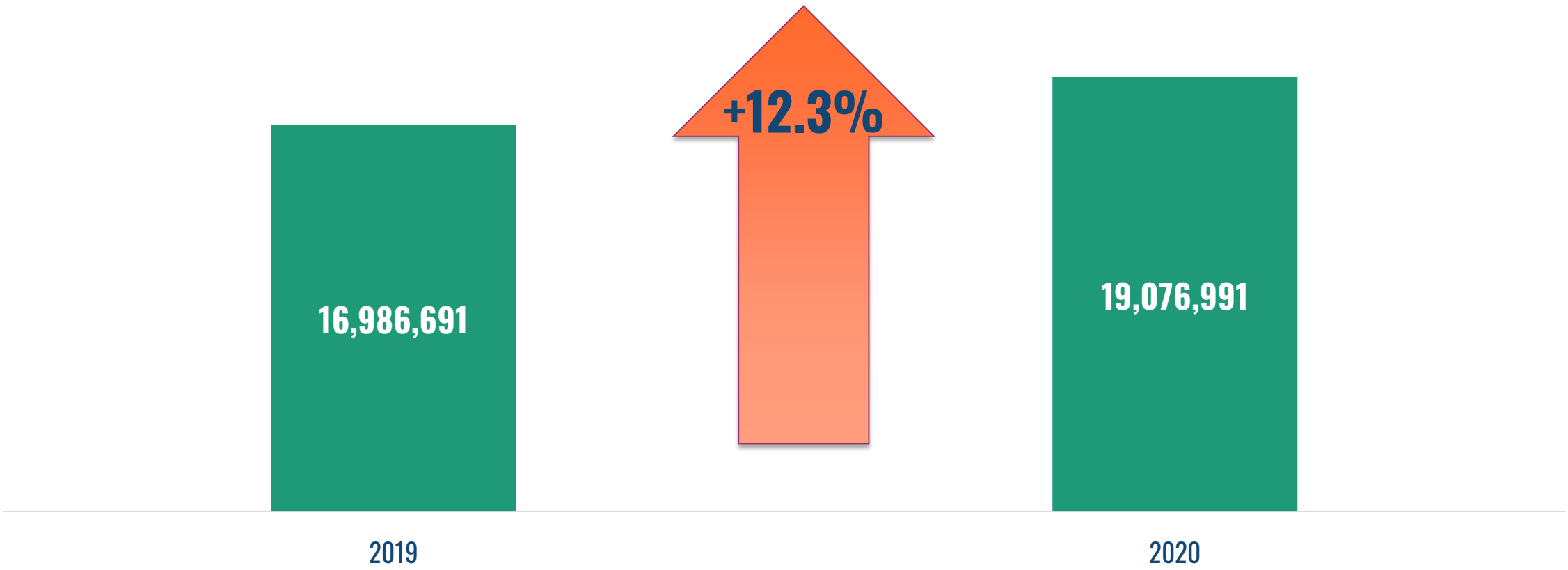
Visitors to Missouri State Parks during January - October



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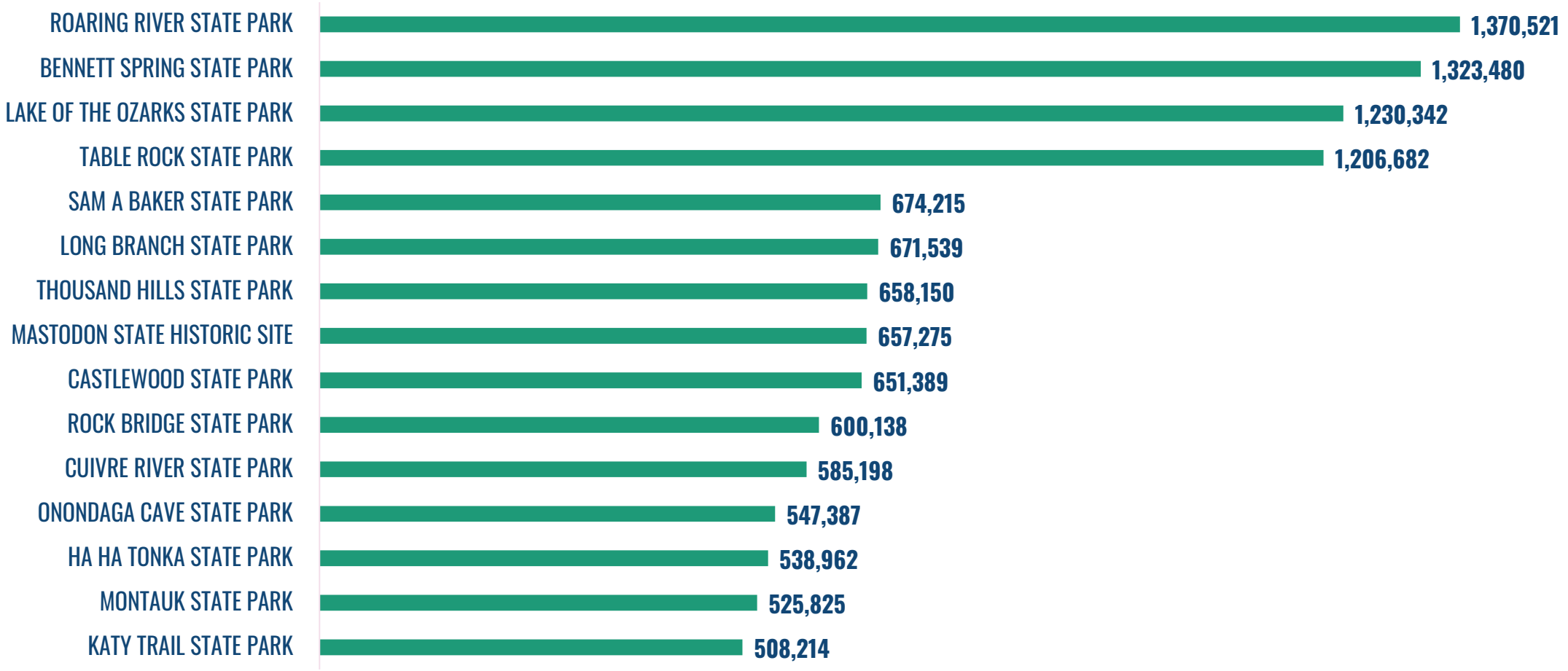
Most Visited Missouri State Parks during January - October



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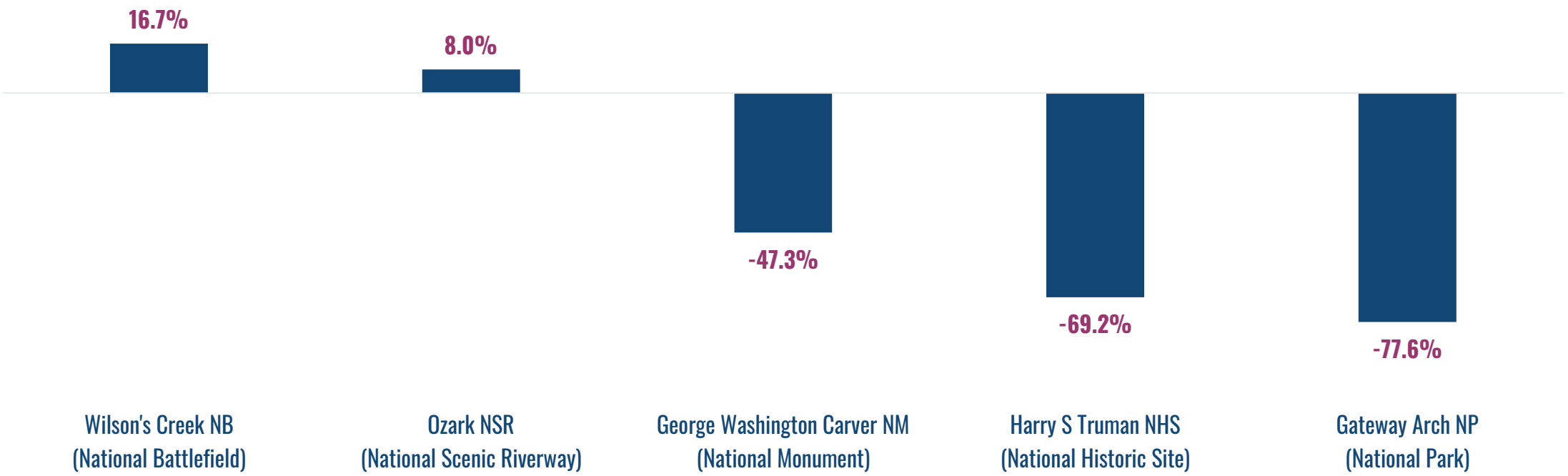
Missouri National Parks Attendance

% of Change in Visits to Missouri National Parks
January – November 2020 Compared to 2019



Notes: The visitor centers at the Wilson's Creek NB, the George Washington Carver NM, and the Harry S Truman NHS have been closed since mid-March due to Covid-19 precautions. Truman's home also remains closed, but the farm grounds are open. At the Gateway Arch NP, the Old Courthouse remains closed, but Tram Rides to the top of the Arch resumed on September 1.

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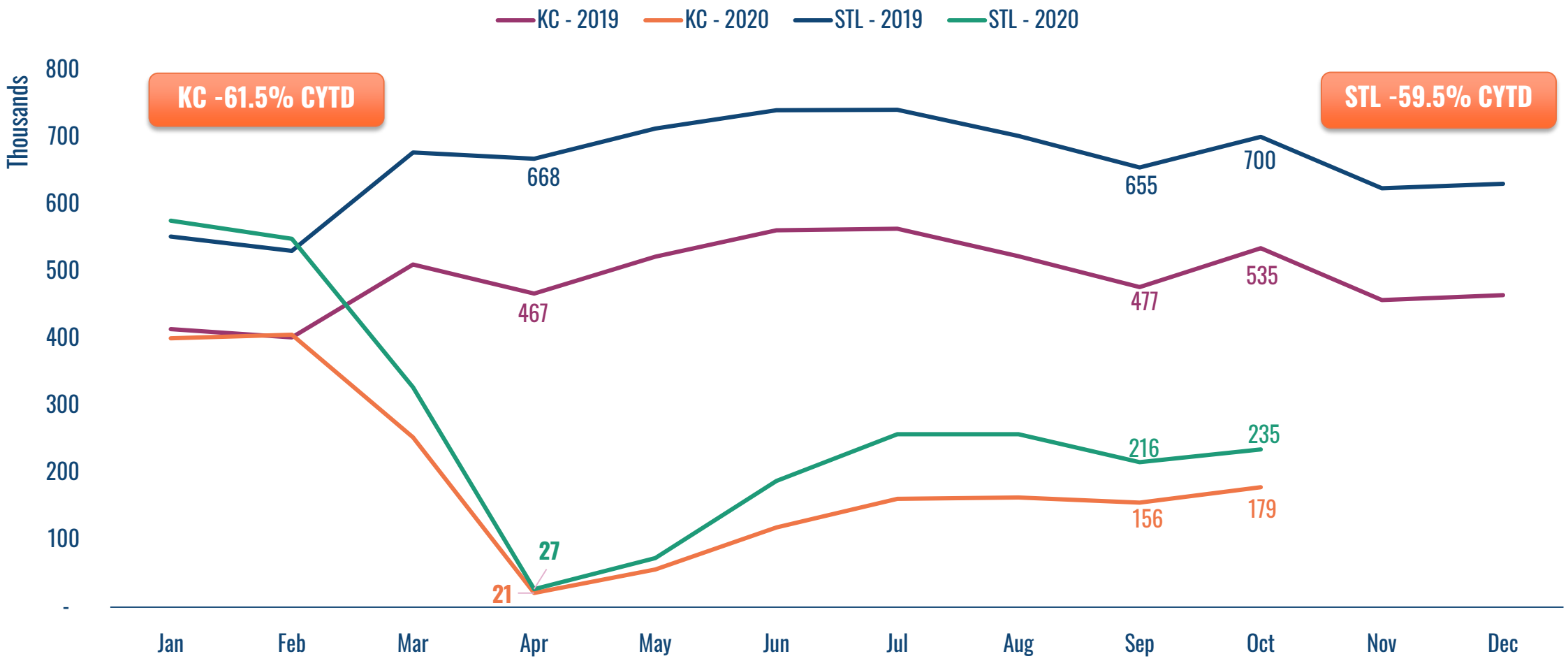
KC & STL Airport Deplanements



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