

TENNESSEE TOURISM:



THE FUTURE IS BRIGHT
2023



TOURISM IS REAL MONEY

Greetings,

We are incredibly grateful to each of you for believing and investing in our vision for tourism in Tennessee, and ultimately for the betterment of our state. I am pleased to share the plan you helped make a reality is working. We saw record numbers last year and the trend continues into 2023.

Many of our partners and, notably, our rural communities are experiencing unparalleled success, which creates more jobs and ultimately, more revenue in Tennessee. Through our work in Rural Tourism and Outreach, cities in at-risk and distressed counties are learning to leverage visitor tax to reduce the burden on residents. We look to outdoor programs like Bill Dance Signature Lakes and Bike Tennessee to further bolster these efforts.

The future is bright as we promote Tennessee's diverse tourism offerings, resulting in more visitor spending and tax revenue to benefit residents of our great state.

Blessings,



Commissioner Mark Ezell

Tennessee Department of
Tourist Development

VISIT OUR INDUSTRY
PAGE FOR MORE.



“As a major attraction and significant economic driver in a rural community, Discovery Park greatly depends on our friends in the Department of Tourist Development. That need for support, guidance and benchmarking increased exponentially as we reopened after the pandemic. We’re happy to report that in most categories, our revenue last year was the best in our museum and heritage park’s history.”

SCOTT WILLIAMS, DISCOVERY PARK OF AMERICA



**TRAVEL &
TOURISM
INDUSTRY**



Domestic Visitor
Spending:

\$24B



State and Local Tax Savings
per Tennessee Household:

\$755.41 ANNUALLY

THANKS TO TRAVEL-GENERATED TAX REVENUE



Source: USTA, Tourism Economics

LEISURE & HOSPITALITY SUPPORTS TOURISM...

THE MORE THEY STAY,
THE MORE THEY SPEND.



11.5% INCREASE

Nights sold across Tennessee (YOY)

Source: Smith Travel Research & AirDNA



Demand for overnight stays
is stronger than ever in TN!

TOP 15 ORIGIN STATES FOR OUT-OF-TOWN VISITORS

GEORGIA
KENTUCKY
FLORIDA
NORTH CAROLINA
OHIO

ALABAMA
ILLINOIS
INDIANA
TEXAS
VIRGINIA

MISSISSIPPI
SOUTH CAROLINA
MICHIGAN
MISSOURI
CALIFORNIA

89.7%

spend at least 1 night in Tennessee.

Source: Arrivalist

GOOD FOR
THE PEOPLE

DELIVERING REAL MONEY FOR TENNESSEE...



\$1.76B*

State sales & use tax collections
from Leisure & Hospitality

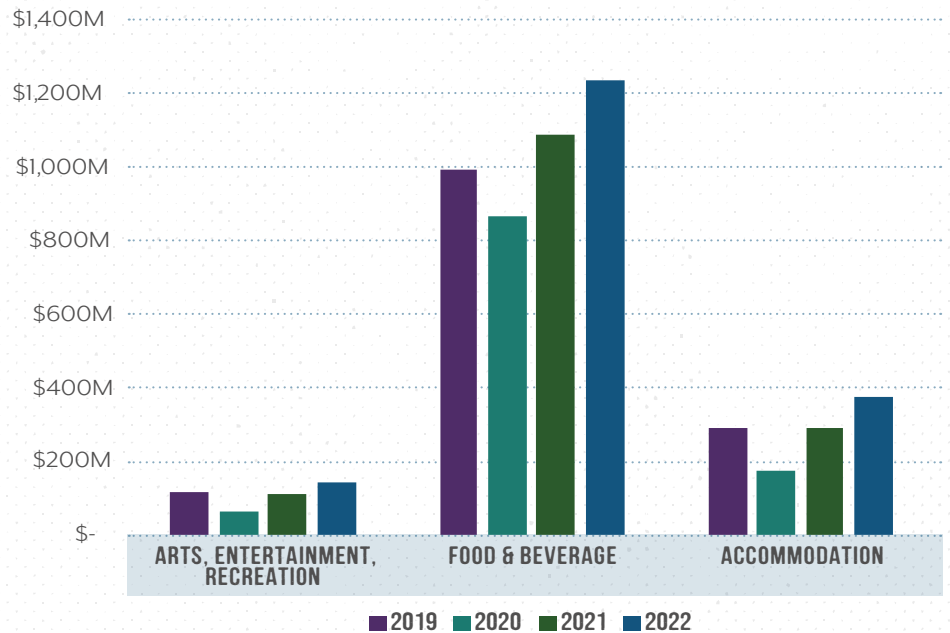
Source: TN Dept of Revenue

*December 2022 values are preliminary.



18% increase in sales
tax collection (YOY)!

STATE SALES & USE TAX



GOOD FOR THE
COMMUNITIES

AND A BRIGHTER FUTURE FOR TENNESSEANS.

\$617M*

Estimated direct local taxes
generated from Leisure & Hospitality

Source: TN Dept of Revenue

*December 2022 values are preliminary.

“Tourism development has helped Grundy County enjoy the benefit of increased jobs and entrepreneurship, but has also added services and lessened the tax burden on our citizens.”

MICHAEL BRADY, GRUNDY COUNTY MAYOR

ADVERTISING MARKET MAP 2023

Existing Markets ★

Atlanta
Charlotte
Chicago
Cincinnati
Dallas
Indianapolis
Jackson
Little Rock
Greenville
Louisville
St. Louis
Tampa

New Markets ★ 2021-2022

Detroit
New Orleans
Orlando
Raleigh-Durham
Washington D.C.

Alabama Statewide
Kentucky Statewide
Missouri Statewide
Ohio Statewide



**9
NEW
MARKETS!**

Test Markets ★

2023

Austin
Baltimore
Boston
Charleston
Denver
Evansville
Jacksonville
Minneapolis

Illinois Statewide

POPULATION OF MARKETS*:

2018: 35M • 2020: 45M • 2022: 75M • 2023: 100M

*Total Population is used directionally in planning and represents the total market population, not the total number of users in market for travel. **Source: Arrivalist, Calibrated Data. Note: This is data through 1/2023

MARKETING CAMPAIGNS:

- Introduced Spring Break-specific creative with “Spring Break on Shuffle”
- Launched Spring / Summer campaigns in early 2022 to match vacation planning trends
- Ran campaigns in Canada for the first time ever
- Supported Tennessee Civil Rights Trail with targeted paid campaigns
- Partnered with Waze to capture drivers near Welcome Centers

INTERNATIONAL:

- Hosted 16 international guests from eight countries in East Tennessee
- Led a Sales & PR mission to London and Dublin with six state partners
- Joined Travel South USA on a Sales & PR mission to Toronto
- Attended four international tradeshow
- Retained new German representation firm to spur growth in the German market



KID REVIEWED



WINTER



SPRING BREAK



HOLIDAY



**TENNESSEE
SONGWriters
WEEK**

**SPECIAL THANKS TO OUR
LEGISLATORS FOR MAKING
THIS A REALITY!**

50+ QUALIFYING ROUNDS

LARGEST
EVER!

7 SHOWCASE EVENTS STATEWIDE

LARGEST
EVER!

1,200+ SONGWRITERS PERFORMING IN 35+ COUNTIES

LARGEST
EVER!

TSW CELEBRATES 5 YEARS IN 2023



13M+

Visitors in 2022

16

Welcome Centers

4.92/5

Guest Satisfaction Rating

“The value of our frontline (Welcome Center) ambassadors in supplying visitors with helpful information is enormous.”

DAVE POOLE, WONDERWORKS TN & ALCATRAZ EAST, PIGEON FORGE

TENNESSEE'S 2023 OFFICIAL VACATION GUIDE

CHOOSE YOUR OWN



VACATION

VACATION GUIDE

The 2023 Tennessee Vacation Guide features attractions and activities from across the state. No matter what you choose, Tennessee offers endless adventure to check off everyone's travel bucket list.



TOURISM EXPANDS RECREATION AND OUTDOOR EFFORTS:



Through partnerships with TDEC and TWRA, Tourist Development will launch one of the biggest outdoor efforts the state has participated in: The Bill Dance Signature Lakes.

- Includes 14 to 18 lakes in 39 counties throughout the state, 22 of which are at-risk or distressed
- Will drive economic activity across the state through fishing
- Encompasses lakes best suited for a diverse offering of experiences for anglers of all skill levels
- Development and improvement of access points, fisheries and facilities to enhance the overall experience

MARY KATELYN PRICE
Legislative Liaison
MaryKatelyn.Price@tn.gov



For staff directory and additional data, visit industry.tnvacation.com



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Hiking in Unicoi County

Because of the recurring budget for rural tourism approved by the legislature in FY22, Tourist Development continues to build a sustainable program with educational, financial and developmental offerings to Tennessee's distressed and at-risk counties.

- **NEW** Tourism Roadmap Work Sessions: Bringing local movers and shakers together for a guided discussion focused on tourism marketing and development
- Photography and Video Assistance Program
- Short-Term Rental Workshops
- More grant dollars at lower match requirements
- **NEW** Bike Tennessee, launching Summer 2023

"The sessions in Jackson, Clay and Warren counties have been invaluable. Local leaders provide grassroots input about their needs and the state provides resources vital to the communities."

MARK DUDNEY, HISTORIC PRESERVATION PLANNER