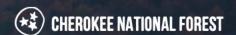
TOURISM: TENNESSEE'S ECONOMIC RECOVERY ENGINE

TENNESSEE



2019 ECONOMIC IMPACT OF TRAVEL







In Travel Expenditures Consecutive Growth Person Stays (Up 5.7% YOY)





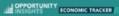
COVID HITS



TOTAL SPENDING

APRIL 12

Source: Opportunity Insights Economic Tracker







BILLO MELINEIA GATES dunderne

Week ending Apr 12, 2020

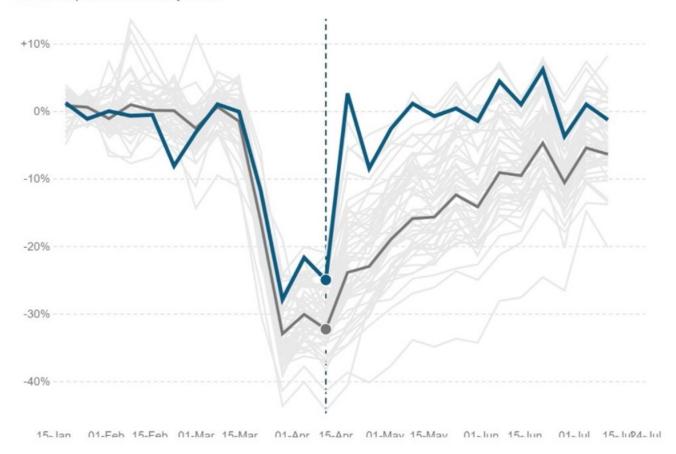
-25% Tennessee

-32.3%

USA

Percent Change in All Consumer Spending*

In **Tennessee**, as of April 12 2020, total spending by all consumers decreased by **25%** compared to January 2020.



^{*}Change in average consumer credit and debit card spending, indexed to January 4-31 2020 and seasonally adjusted. This series is based on data from Affinity Solutions.

last updated: July 23, 2020 next update expected: July 28, 2020

TENNESSEE PLEDGE

- Detailed guidelines for 16 industries
- 20+ industry working groups
- 300+ industry leaders
- Developed in concert with public health experts
- Includes business toolkit and PPE directory

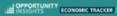


Reopening Tennessee Responsibly

The "Tennessee Pledge" is a plan to help Tennesseans return to work in a safe environment, restore their livelihoods and reboot our state's economy.

TOTAL SPENDING JUNE 10

Source: Opportunity Insights Economic Tracker







GATES AUTOM

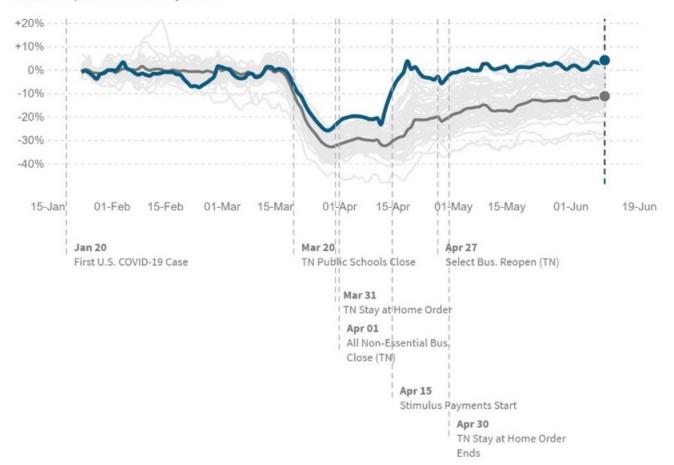
Jun 10, 2020

+4.1% Tennessee -11.3%

USA

Percent Change in All Consumer Spending*

In **Tennessee**, as of June 10 2020, total spending by all consumers increased by **4.1%** compared to January 2020.



^{*}Change in average consumer credit and debit card spending, indexed to January 4-31 2020 and seasonally adjusted. This series is based on data from Affinity Solutions.

last updated: June 17, 2020 next update expected: June 23, 2020

GOAL: 1 MILLION MASKS





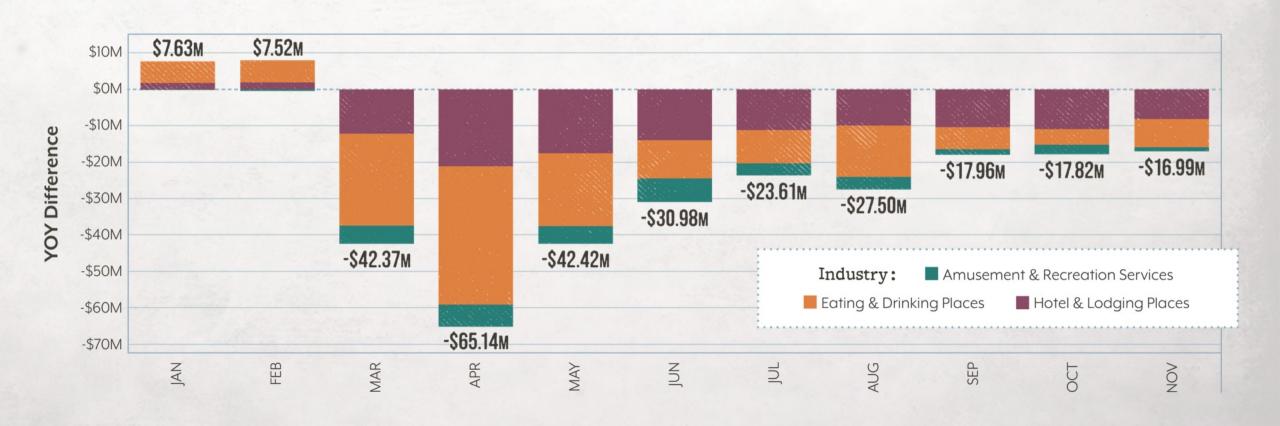
1.1M+ MASKS

EDUCATIONAL INSTITUTIONS,
SPORTS TEAMS, BUSINESSES
AND COMMUNITIES

TENNESSEE STRONG MASK MOVEMENT

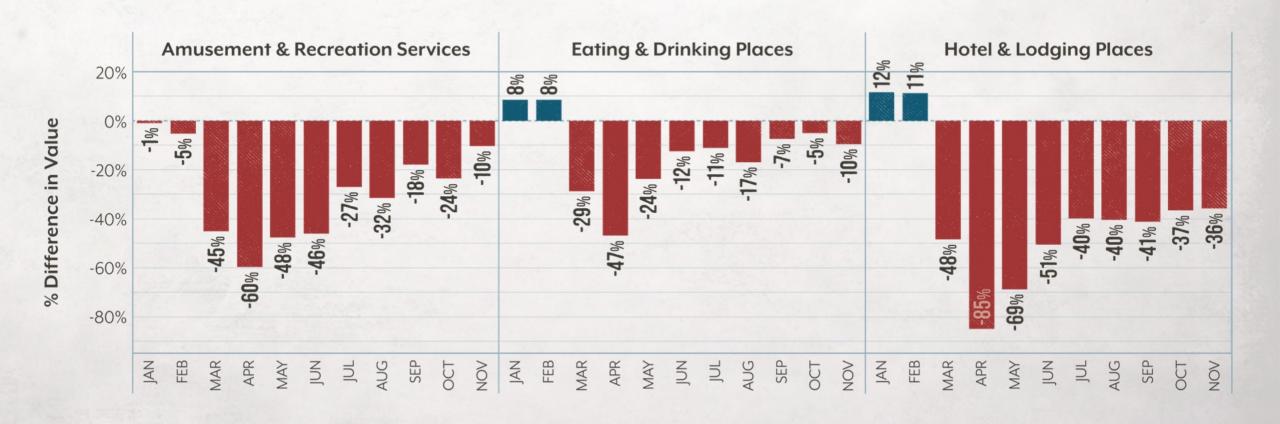
LEISURE & HOSPITALITY SALES & USE TAX COLLECTIONS

Year-Over-Year Loss by Month, 2020



LEISURE & HOSPITALITY SALES & USE TAX COLLECTIONS

YOY % Change by Industry, 2020



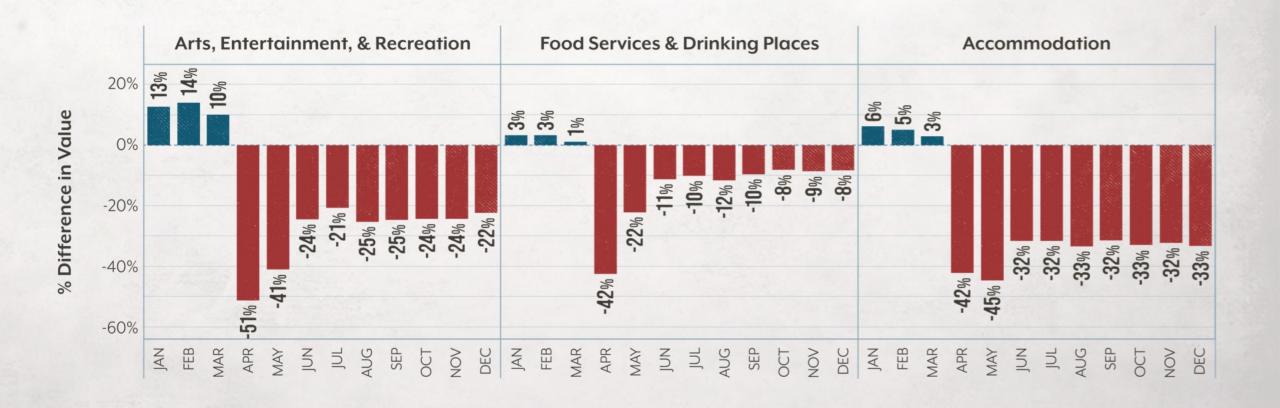
LEISURE & HOSPITALITY SALES & USE TAX COLLECTIONS

YOY % Difference by County, 2020



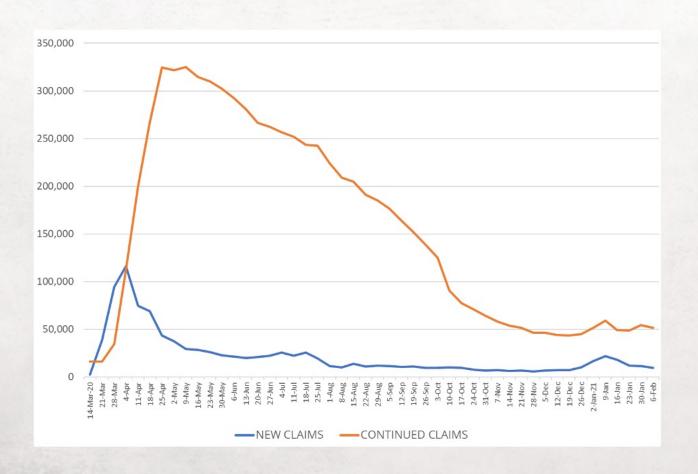
LEISURE & HOSPITALITY LABOR MARKET REPORT

Employment YOY % Change, 2020



UNEMPLOYMENT INSURANCE CLAIMS

Have Declined from Peak of 324K to 51K



WEEK ENDING DATE	NEW CLAIMS	CONTINUED CLAIMS 125,238	
3-Oct	9,839		
10-Oct	10,145	90,507	
17-Oct	9,873	77,740	
24-Oct	7,770	70,982	
31-Oct	6,992	64,188	
7-Nov	7,221	58,298	
14-Nov	6,182	53,976	
21-Nov	6,873	51,624	
28-Nov	5,789	46,665	
5-Dec	6,886	46,404	
12-Dec	7,464	44,215	
19-Dec	7,411	43,482	
26-Dec	10,198	45,226	
2-Jan-21	16,554	51,816	
9-Jan	21,954	58,945	
16-Jan	18,237	49,270	
23-Jan	12,050	48,996	
30-Jan	11,497	54,280	
6-Feb	9,498	51,660	

LEISURE & HOSPITALITY EMPLOYMENT REPRESENTS



Of Jobs Lost In 2020

LEISURE & HOSPITALITY INDUSTRY

Comparative Chart

	2019	2020	CHANGE	% CHANGE
GROSS TAXABLE SALES	\$19.8B	\$15.7B	-\$4.1B	-21%
SALES & USE TAX COLLECTIONS	\$1.4B	\$1.1B	-\$288M	-21%
EMPLOYMENT*	349K	302K (P)	-47K	-13.4%

(P) = PRELIMINARY

RECOVERY

TOTAL SPENDING JANUARY 24

Source: Opportunity Insights Economic Tracker



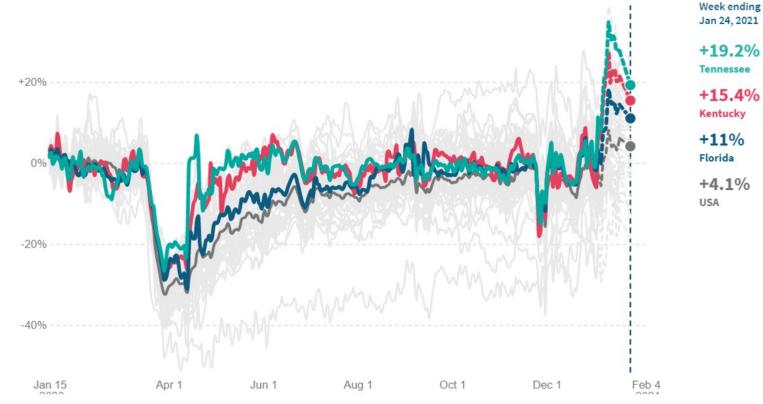




BILL&MELINDA GATES foundation

Percent Change in All Consumer Spending*

In Florida, as of January 24 2021, total spending by all consumers increased by 11% compared to January 2020.



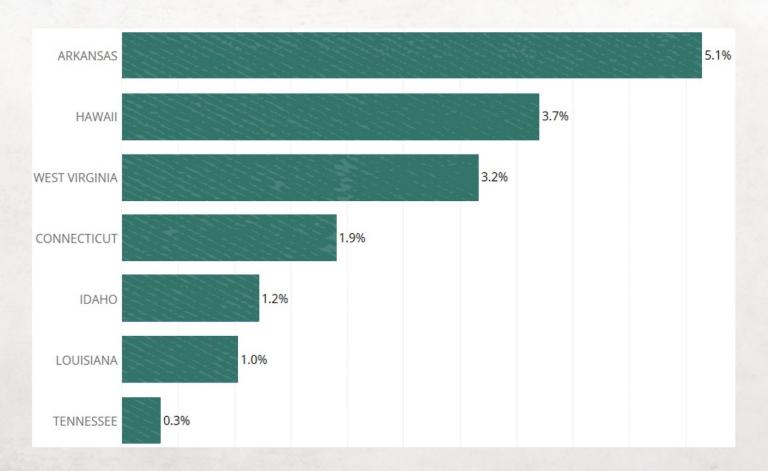
*Change in average consumer credit and debit card spending, indexed to January 4-31, 2020 and seasonally adjusted. The dashed segment of the line is provisional data, which may be subject to non-negligible revisions as newer data is posted. This series is based on data from Affinity Solutions.

last updated: February 04, 2021 next update expected: February 10, 2021

visit tracktherecovery.org to explore

AVERAGE % CHANGE IN CONSUMER SPENDING

April 13 - January 17

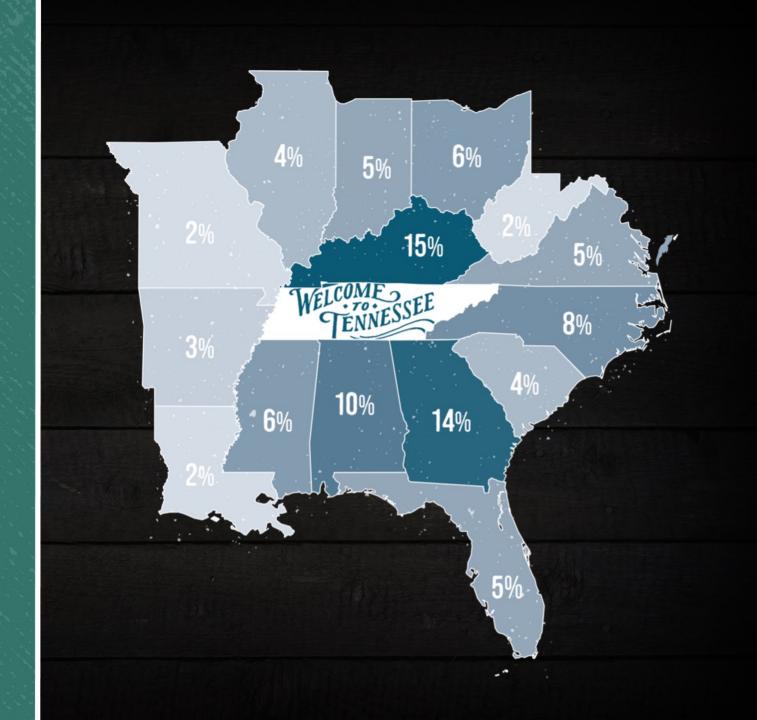




1 of only 7 states to have positive change

Source: Opportunity Insights Economic Tracker

ARRIVALS TO TENNESSEE JUN.-DEC. 2020



ARRIVALIST SUMMER 2020

Top 5 states in America

Tennessee Business Relief Program (Revenue) \$200M+T0 SMALL BUSINESSES

Emergency Broadband Relief (Economic Development)
\$61M TO FUND FIRST-TIME BROADBAND ACCESS

Agriculture and Forestry Relief (Agriculture) \$50M TO ENSURE STABILITY OF FOOD SUPPLY CHAIN

TN Community CARES Program \$150M IN RELIEF FUNDS AVAILABLE FOR TENNESSEE NON-PROFITS

TENNESSEE CARES INITIATIVES

\$900MUI UNEMPLOYMENT INSURANCE REIMBURSEMENT

\$50M SERG SUPPLEMENTAL EMPLOYER RECOVERY GRANT

TN TOURISM CARES MARKETING PROGRAM



\$25M IN CRF FUNDS

TO PROMOTE SAFETY, BUILD CONSUMER DEMAND FOR TOURISM



\$15M for destination marketing organizations

Tourist Development managed campaign

Welcome Center Communication Enhancements

Tennessee State Parks

Regional Tourism Offices

Tennessee Wildlife Resources Agency

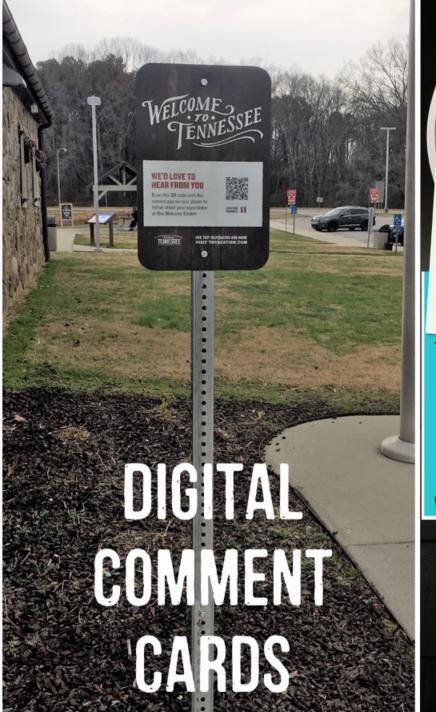
TN TOURISM CARES MARKETING PROGRAM

- 113 DMOS and Regional Tourism Offices
- \$14M+ distributed
- Tracking beyond the program



SENATOR ALEXANDER AT HARTFORD







FIBER INTERNET & VIDEO MONITORS



FREE TRAVEL SAFE KITATENNESSEE
WELCOME CENTERS





7 BILLBOARDS

8
150,000 KITS

FORTHE LOVE OF TENNELSSEE TRAVELSAFE

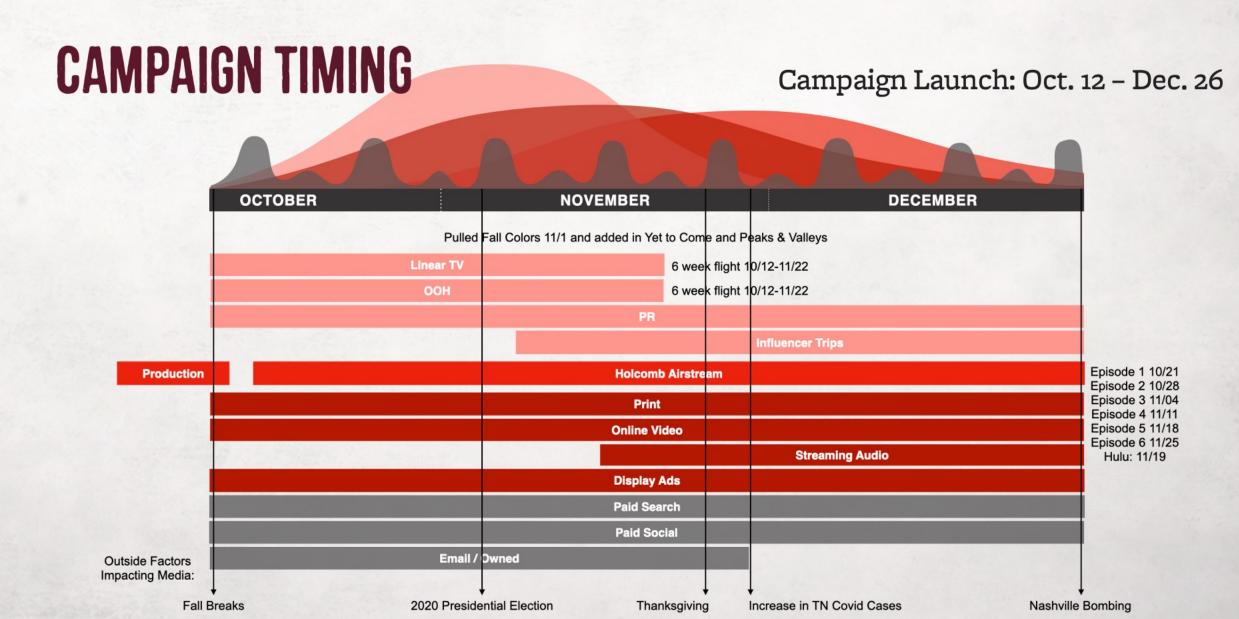
OVERALL BUDGET

Timing: Sept.-Dec. 30, 2020

Total Budget: \$6,890,160

- Media (broadcast, digital, social, paid search, etc.) \$4,640,160
- Production (filming, editing, music, licensing, etc.) \$1,000,000
- Advertising agency (creative, media, reporting etc.) \$1,231,000
- Effectiveness research \$19,000 (wave 1)





























SIX FEET APART? HOW ABOUT

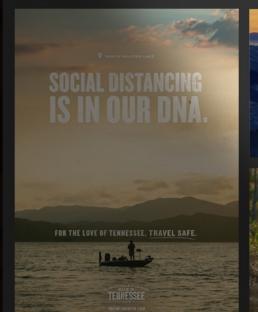
FOR THE LOVE OF TENNESSEE, TRAVEL SAF













CAMPAIGN SUMMARY -

Impressions

Earned Impressions

276MM 61.9MM 567K Completed Video Views (Paid Media)

120MM 85.25K

Organic Video Views

19K

Clicks to Site

Organic Social Engagements



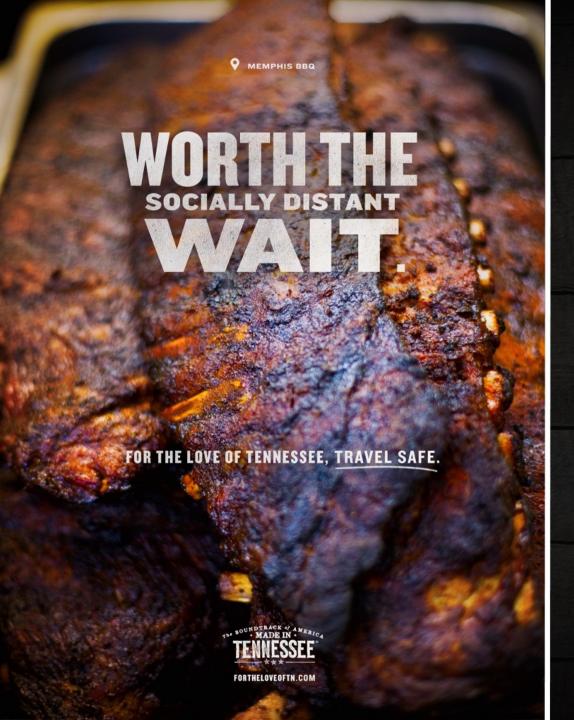
FOR THE LOVE OF RED.



SOCIAL DISTANCE JUST COMES WITH THE TERRITORY.

FOR THE LOVE OF TENNESSEE. TRAVEL SAFE.





Broadcast

Digital

Out of Home - Billboards

Gas Station Pump Toppers

Print

Holcomb Family

8 Influencers

Travel Writers

FOR THE LOVE OF A FAMILY ROAD TRIP

Traveled 1,600 miles in TN

Wrote two songs

Six Long-form Videos

Four:30 sec on Hulu

10,058,526 Video Views

2.32 Decades of View Time

fortheloveofTN.com



EXCLUSIVE

Drew and Ellie Holcomb's Epic Road Trip Across Tennessee Results in the Most Romantic of Realizations

"It just became this magical experience where I remembered our days at the University of Tennessee," Drew warmly tells PEOPLE





Archie Campbell BULLS GAP

Dr. Bobby Jones PARIS

Charlie Cushman CLARKSVILLE

Chattanooga Choo Choo

Chris Young MURFREESBORO

Mandy Barnett CROSSVILLE

Taylor Swift HENDERSONVILLE

The Isaacs HENDERSONVILLE



A FILM BY KEN BURNS

THE PATHWAY

VISIT THE PLACES
THAT INSPIRED THE MUSIC



REVIEWED LOCATIONS

Memphis	Nashville	Chattanooga	Knoxville	Smokies	Other
Peabody Ducks	Adventure Science Center	Tennessee Aguarium	The Muse	Dollywood	Discovery Park of America
Memphis Zoo	Nashville Zoo	Chattanooga Zoo	Navitat	Ripley's Attractions	Safari Park
My Big Backyard	Soundwaves	Highpoint Climbing	Zoo Knoxville	Sevier Air	Casey Jones
Fire Museum	SOAR Adventure	Creative Discovery		Anakeesta	Village
Bass Pro Shop	Frist Art Museum	Museum		Wilderness at the Smokies	Fall Creek Falls
Children's Museum	C	Lookout Mountain			Hands On!
of Memphis	Country Music Hall of Fame and	Attractions/Ruby Falls			

of Fame and Museum



REGGIE AWARDS

CREATIVITY & INNOVATION CAMPAIGNS GOLD WINNER

SUPER REGGIE WINNER

REVIEWED

COLORBLIND VIEWFINDERS

Budget Travel

REDISCOVER AMERICA

Best spots for fall foliage in the South and Mid-Atlantic

10/1/2020 — By Michele Herrman



Colorblind Tourists in Tennessee Can Take in the Fall Foliage With These Viewfinders

TRAVEL+

Devices alleviating red-green color deficiencies can be found at 12 outdoor locations in Tennessee.

BY MICHELE HERRMANN OCTOBER 09, 2020

The Washington Post

Colorblind travelers can take in the true colors of fall thanks to these viewfinders

Tennessee's tourism board has installed viewfinders with special lenses all over the state



Frommer's

High-Tech Lenses Let Color-Blind Travelers See Art and Nature in Full Color



TDTD TEAM UPDATE



Rob Regg
Director of Marketing



Mary Katelyn Price Communications Specialist



THE 2021 TENNESSEE VACATION GUIDE IS HERE

FIRST-EVER CULINARY THEMED GUIDE







Tennessee Restaurants Less jobs since pandemic onset

Decline in gross taxable sales

TN COVID-19 VACCINATION REPORTING









1,131,689 total vaccinations reported

10.66% of people with at least one dose

105,263 people vaccinated; age 61-70 years old

240,826 people vaccinated; age 71-80 years old





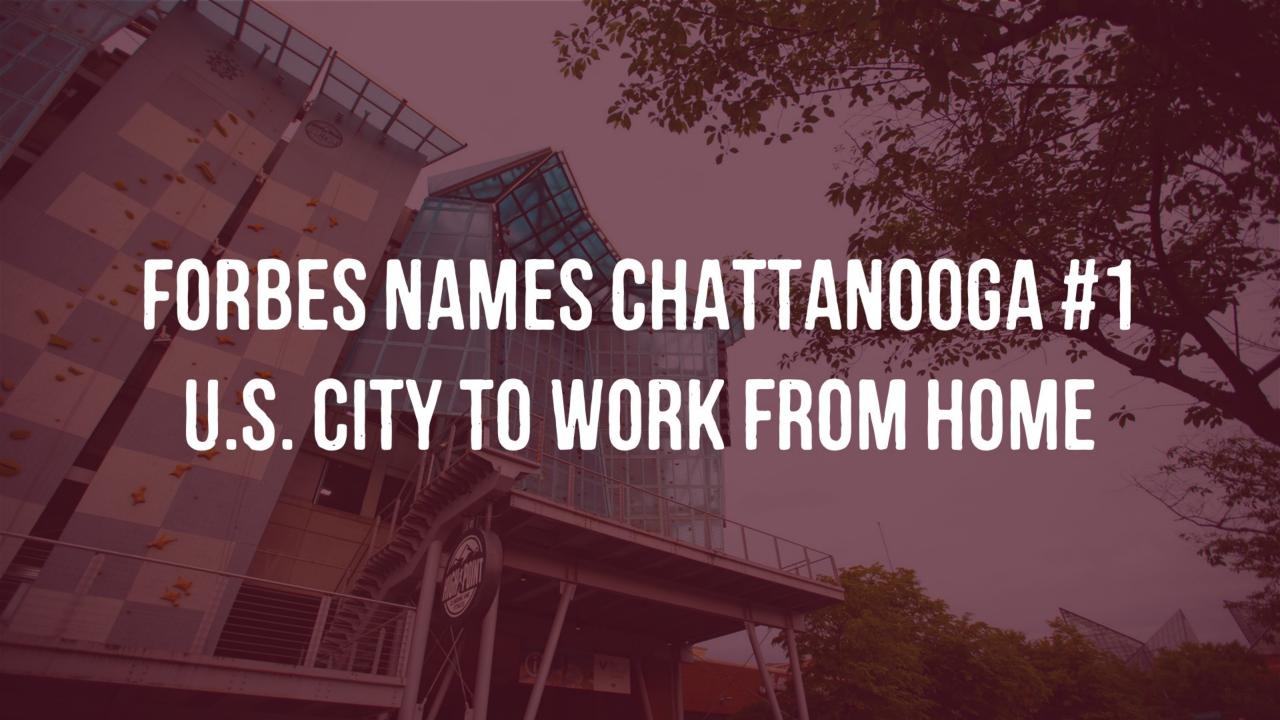




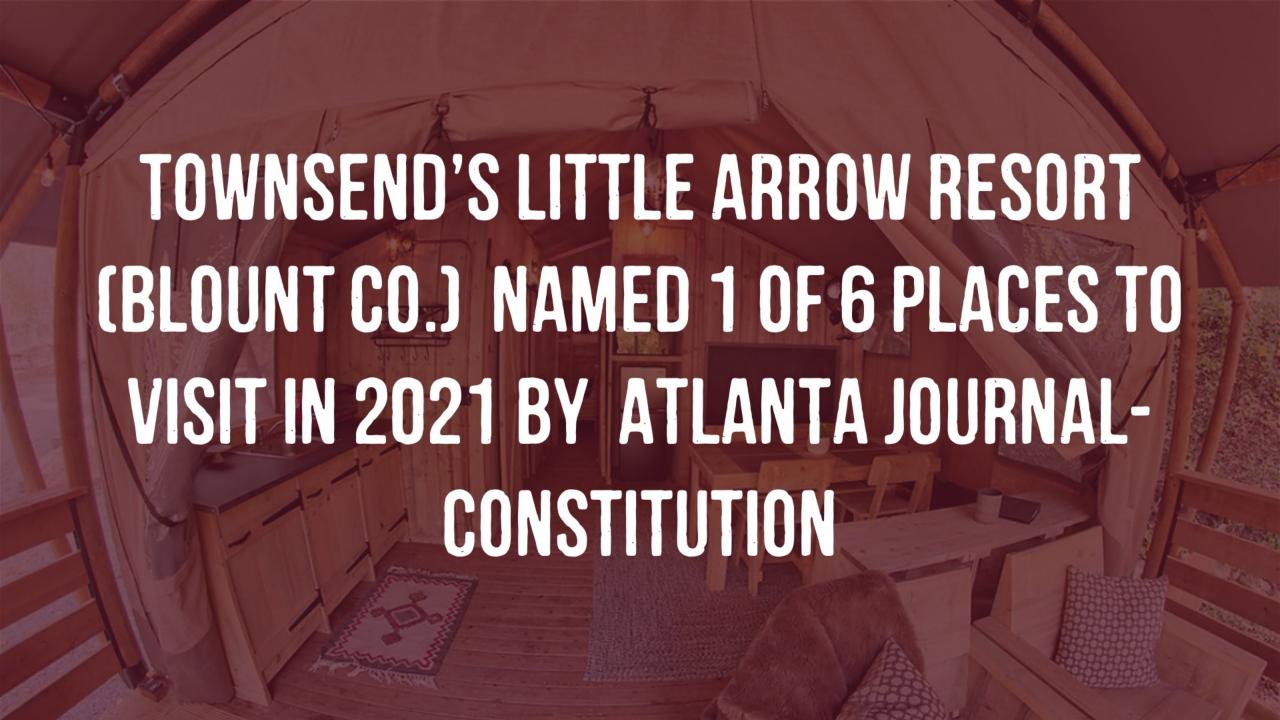




SEVIERVILLE'S WILDERNESS AT THE SMOKIES ONE OF TRAVEL & LEISURE'S TOP 10 BEST INDOOR WATER PARKS



SEVIER COUNTY LAUNCHES NEW SOUTHERN HOSPITALITY INTERNSHIP PROGRAM



MEMPHIS' SHELBY FARMS GREENLINE NAMED BEST BIKE TRAIL IN TENNESSEE BY READER'S DIGEST











CLARKSVILLE'S BEACHAVEN WINERY NAMED "WINERY EVERYONE IS TALKING ABOUT" BY REDBOOK







JEFFERSON COUNTY AND DOUGLAS LAKE HOST PHOENIX BASS FISHING LEAGUE ALL-AMERICAN CHAMPIONSHIP IN 2021





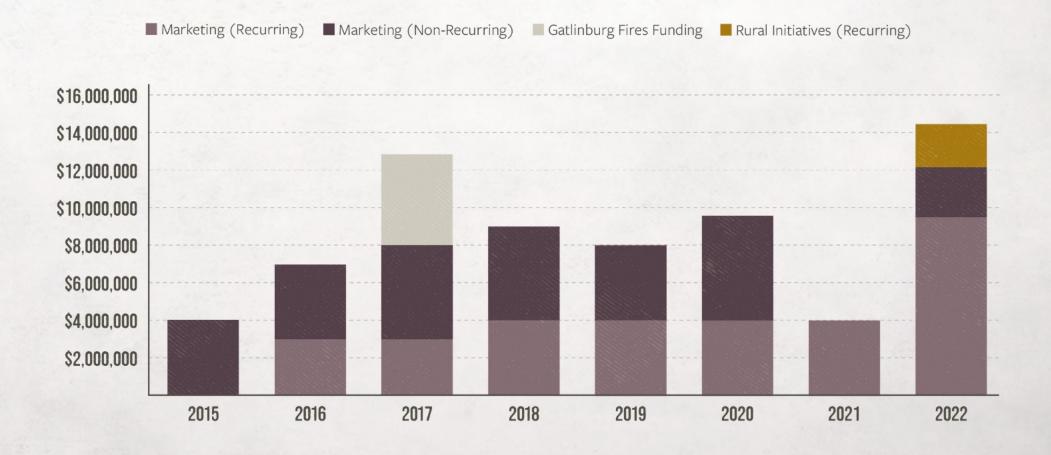
5 NEW SCENIC BYWAYS NEWFOUND GAP GREAT RIVER ROAD SEQUATCHIE VALLEY **CUMBERLAND HISTORIC VALLEY** NORRIS FREEWAY

TDTD MARKETING BUDGET

GOVERNOR LEE'S PROPOSED BUDGET

	2015	2016	2017	2018	2019	2020	2021	2022
Marketing (Recurring)		\$3,000,000	\$3,000,000	\$4,000,000	\$4,000,000	\$4,000,000	\$4,000,000	\$9,500,000
Marketing (Non-Recurring)	\$4,000,000	\$4,000,000	\$5,000,000	\$5,000,000	\$4,000,000	\$5,500,000		\$2,500,000
Gatlinburg Fires Funding			\$4,800,000					
Rural Initiatives (Recurring)								\$2,263,000
CARES Act Campaign*							\$25,000,000	
	\$4,000,000	\$7,000,000	\$12,800,000	\$9,000,000	\$8,000,000	\$9,500,000	\$29,000,000	\$14,263,500

TDTD MARKETING BUDGET



OFFICE OF RURAL TOURISM & OUTREACH: BUILDING ON MOMENTUM

RURALTOURISM



