

PARTNER RESOURCE GUIDE 2022-2023



CONTENTS

Outreach	4
Rural Tourism & Outreach	5
Destination Development	6
Tourism Grants	8
Education	9
Marketing	10
Marketing Map	12
Interest Segments	13
Communications	14
Travel Trade	15
Initiatives	16
Tourism Initiatives	18
Tourism Website	20
Brand Guidelines	21

Welcome Centers	22
Update	23
Directory	24
Research	26
Economic Impact	28
Visitation	30
Leisure & Hospitality Industry	31
Domestic Visitor Analysis	34
Administration Services	36
	30
Staff Contact List	37
Notes	38





Downtown Ripley, Tennessee

RURAL TOURISM & OUTREACH

The Office of Rural Tourism and Outreach works closely with Tennessee tourism industry partners, including destinations marketing organizations, chambers of commerce, city and county governments, attractions, other state agencies and departments, and stakeholders to identify and connect resources and opportunities.



Melanie Beauchamp Assistant Commissioner Melanie.Beauchamp@tn.gov 615-741-9009



Zach Ledbetter Director of Outreach Zach.Ledbetter@tn.gov 615-532-2963



Dennis Tumlin Chief Customer Officer Dennis.Tumlin@tn.gov 615-532-4132

Outreach & Engagement

Each grand division of Tennessee has a Division Manager which will serve as a great day-to-day contact and connection to TDTD. The team is a direct conduit between partners and offerings such as grants, educational workshops, speaking engagements, asset identification, tourism development, marketing, initiatives and PR assistance.



Ashley DeRossett Division Manager, Middle Ashley.DeRossett@tn.gov 615-454-0196



Dave Jones Division Manager, East Dave.Jones@tn.gov 865-335-9142



Marty Marbry Division Manager, West Marty.Marbry@tn.gov 731-225-0053

Destination Development

Visitation and the economic impact of tourism continued to grow in Tennessee's rural areas in 2021.

As a result, the state legislature supported and passed \$2.1 million in recurring funding to allow TDTD to take a multi-year approach to provide planning and educational, financial, and destination development programs for Tennessee's distressed and at-risk counties.

We are excited about the programs and initiatives that will be launched in 2023. Here are a few current offerings for our rural tourism partners:

Google Destination Optimization Program

This educational training program offers rural partners the opportunity to conduct a Google audit analysis for tourism assets in their community. Hands-on training is provided to enhance Google listings and photography, with the goal of increasing visitation through data accuracy and completeness through Google.

Rural Photography and Video Program

This technical assistance program offers rural partners the opportunity to gain a collection of photography and video assets to be used for tourism marketing efforts.

Tourism Roadmap Work Sessions

This planning initiative is offered to county leaders and tourism partners in rural counties to assist in the creation of planning documents to guide tourism efforts. The work sessions offer a guided discussion focused on tourism marketing and development opportunities, and includes follow-up planning documents and materials, as well as on-going support.

Tiered matched grants for Rural DMOs

TDTD has increased the annual Marketing Grant budget and lowered match requirements for rural tourism partners.



Short-Term Rental Workshops

This training workshop is offered to current and potential short-term rental operators to provide information about vacation rental markets, laws and regulations, customer service, proper cleaning guidelines, as well as how to get started with rentals and enhance current properties.

Technical Assistance & Training Programs

TDTD is partnering with Tennessee Universities across the state to develop hands-on workshops and technical assistance programs related to branding, marketing, visitor readiness, cultural heritage, outdoor recreation and more.

Tennessee Cycling Program

This new road cycling initiative will provide curated and downloadable routes in each tourism region of the state. Routes will showcase the state's most scenic areas on low-traffic roads, bringing attention to the scenic beauty of Tennessee's rural areas. Routes will be free to download and will include detailed descriptions highlighting related restaurants, lodging, and other notable points of interest, giving bicycle tourists numerous opportunities to support the local economy.

Not sure if your county is distressed or at-risk? Visit **tnecd.com/research-and-data/publications**.





Jenni Veal Rural Destination Development Manager Jenni.Veal@tn.gov 615-864-5848

TOURISM GRANTS

Traditional grants last year bounced back to normal and beyond. The Tourism Marketing Grant saw a significant budget increase in addition to a lower match requirement for counties designated as distressed. We are thrilled to continue grant programs for Tourism DMOs, communities and marinas this year .

GRANTS	DESCRIPTION
Tennessee Tourism & Hospitality Recovery Fund (ARPA)	Designed to expedite recovery in the tourism and hospitality industry across the state. The reimbursable grant will offset budget losses and fund tourism marketing and development initiatives for DMOs to generate revenue increasing economic impact through tourism.
Tourism Marketing Grant	This grant provides tourism organizations such as CVBs, chambers of commerce and regional tourism organizations a way to expand their marketing message. This grant is a reimbursable matching grant for marketing projects. The grant opens each July.
Tourism Enhancement Grant	Historically, a joint effort of TNECD and TDTD, it is designed for cities and counties seeking to invest in local tourism infrastructure assets such as stages, signage, enhancement to attractions or venues and other resources that target expanding local tourism.
Waterways Accessibility for Tennessee Recreation (WATR) Grant	Tennessee water recreation has a significant economic impact on both local and state economies. The legislature provided \$500,000 in FY 2022 for grants to marinas to help promote tourism and enhance the visitor experience.

For more information, visit https://industry.tnvacation.com/industryresources/tourism-grants.



Andi Grindley Outreach Projects Coordinator Andi.Grindley@tn.gov 615-741-7994

EDUCATION

Trainings and industry meetings began to return to normal in 2021-22. We increased the number and type of scholarships offered to tourism partners across the state, including for Southeast Tourism Society's Marketing College®. Expanding our education offerings continues to be a priority this year. Whether it is an opportunity to host a presentation, attend workshops through the department or educational conferences, it provides those working in the Tennessee tourism industry a chance to learn from and network with industry leaders and experts.

TOURISM SCHOLARSHIP OPPORTUNITIES	WEBSITE
Hospitality TN Governor's Conference on Tourism and Blizzard Tennessee's hospitality and tourism businesses	hospitalitytn.com
Alabama-Mississippi-Tennessee Rural Tourism Conference An emphasis on tourism in rural areas	almstnruraltourism.com
Southeast Tourism Society Connections and STS Marketing College® Provides a unique education program for the travel and tourism industry	southeasttourism.org

For more information on scholarships, visit **industry.tnvacation.com/scholarships**.

TOURISM EDUCATIONAL OPPORTUNITIES	WEBSITE
ESTO // US Travel Association Educational seminar for tourism organizations	esto.ustravel.org
Destinations International Serving destination marketing and management professionals	destinationsinternational.org
Southeast Tourism Society Connections Travel and tourism experts from Southeast to share industry insights	southeasttourism.org



MARKETING

MARKETING MAP 2022

Growth Markets

Atlanta

Charlotte

Chicago

Cincinnati

Dallas

Detroit

Indianapolis

Louisville

New Orleans

Orlando

Tampa

Washington DC

Mature Markets

Jackson

Little Rock

Greensville

Raleigh-Durham

St. Louis

Statewide Markets

Kentucky

Missouri

Ohio

Alabama





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Patrick Green Marketing Coordinator Patrick.Green@tn.gov 615-741-9027

INTEREST SEGMENTS

OUTDOOR ENTHUSIASTS

- From seeing the beauty to seeking adventure
- Interested in leaf peeping, hiking, water sports, camping, mountain biking
- They spend most of their free time outdoors and capitalize on opportunities to be in nature

EXPERIENCE SEEKERS

- * Love for food, art, fashion, etc.
- They follow trends in food, culture, and fashion
- They are highly active, diverse, and social
- They search for new things to try and do

FAMILIES

- Young families to multigenerational families
- Tend to spend more due to party size
- Plan trips further in advance
- Plan multiple activities
- Looks for affordable options

MUSIC

- Deeply passionate about music
- Concert goers and music history buffs
- Keeps tabs on their favorite musicians

PILLAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
KEY EVENTS	New Year's	Songwriters Week	Spring Market Ad	Break ctivations		Sur	nmer Vacat	ion	Fall B	reak	Holic	lays
FAMILIES	Now Playing Guide				Kid Revi	ewed		-		Hc	iliday Campaig	<u></u> gn
	Now Playing			Spring / Sum	mer Brand				Fall Brand			
MUSIC LOVERS	Guide Songwr	iters Week								Hc	oliday Campaig	gn
						TN Ken E					i	
	Now Playing			Spring/Sum	mer Brand				Fall Brand			
OUTDOOR Enthusiasts	Guide				Fish	iing (Bill Dano	ce + Bassmast	er)		Hc	liday Campaig	<u></u> gn
CULTURE	Now Playing			Spring/Sum	mer Brand					Hc	liday Campaig	<u></u> gn
SEEKERS	Guide					Ci	vil Rights Trail					

ANNUAL CALENDAR

COMMUNICATIONS

Come With Us

- Domestic and international media FAM tours
- Travel South International Showcase (Nov. 27-30, 2022)
- TravMedia's IMM North America (Jan. 25-26, 2023)
- Tennessee Songwriters Week (Feb. 19-25, 2023)
- UK Sales & Media Mission (March 2023)
- Germany Sales & Media Mission (April 2023)
- STS Domestic Showcase (April 17-20, 2023)
- Travel South USA Global Week (April 24-27, 2023)
- IPW Media Marketplace (May 20-24, 2023)
- Australia Sales & Media Mission (June 16-23, 2023)
- Share tourism-related news at press.TNvacation.com
- Submit photos to our Photo Library
- Quarterly "What's New" releases
- Monthly themed press releases

Explore TDTD's editorial calendar for submission ideas and deadlines at **industry.TNvacation.com.**



Amanda Murphy Director of Communications Amanda.Murphy@tn.gov 615-741-9010



Jill Kilgore PR Media Manager Jill.Killgore@tn.gov 615-741-9069



Mary Katelyn Price Communications Specialist MaryKatelyn.Price@tn.gov 615-741-9007

For information about TDTD marketing campaigns, research, industry news and those in the industry making an impact in their communities, please visit:

- Website: industry.TNvacation.com
- Twitter: @TNTravelNews
- Facebook: TDTDIndustry
- LinkedIn: company/TDTDindustry

For industry updates and breaking news, subscribe to our eNewsletter at **industry.TNvacation.com**.

TRAVEL TRADE

The TDTD sales team works with the travel trade industry, including Tennessee partners, travel agencies, tour operators, receptive operators, product managers and wholesalers to increase Tennessee product offerings in the domestic and international markets. Sales efforts include participating in travel trade shows, sales missions, FAMs, special event sponsorships and marketing investments.

Domestic Sales

Domestically the TDTD sales team focuses on lead generation and networking opportunities with operators and agents.

International Sales

The TDTD sales team strives to build an groups and student travel. Trade shows provide international presence by working with receptive and international tour operators to increase Tennessee product availability on a global scale.





Margaret Fuqua Director of Sales Margaret.Fuqua@tn.gov 615-532-0484



Grace McKinney Sales Manager Grace.McKinney@tn.gov 615-598-2884



IMITIATIVES

INITIATIVES



Tennessee's landscapes are filled with vivid greens, fiery reds, warm oranges and bright yellows. But not everyone can fully experience its beauty. So, the first-ever **Colorblind Viewfinder**, outfitted with innovative EnChroma® lenses that alleviate red-green colorblindness, was created. The lenses allow those with colorblindness to see a broader range of clear, vibrant colors.

To scientifically prove how much fun kids have in Tennessee, we developed a first-of-its-kind wearable device called a "Laugh Tracker" that measures laughter and excitement. We put these devices on hundreds of kids at over 30 attractions across Tennessee and created a planning tool for moms on our website, showcasing the data collected and attraction reviews directly from kids. For more information about this program, visit **kidreviewedtn.com**.



DISCOVER TENNESSEE

The **Discover Tennessee Trails & Byways** program is designed to extend visitors' major market stays and explore Tennessee's back roads. Touching all 95 counties, the 16 extensive driving trails integrate portions of the state's five National Scenic Byways, strengthening the promotion of these established treasures. Discover the trails for yourself at **thrailsandbyways.com**.



Fish Tennessee inspires anglers from around the world to experience the many unique fishing experiences that only Tennessee can offer. Visitors can experience angling adventures such as reeling in a trophy trout on the South Holston River or giant catfish from the Tennessee River, legendary smallmouth bass on Dale Hollow Lake or largemouth bass on Lake Chickamauga. Fish Tennessee helps cultivate an angling community in our lakeside towns that encourages generational visitation and drives economic impact. For more information, please contact Dennis.Tumlin@tn.gov or visit fishtn.com.



In association with TWRA, the State of Tennessee will look to improve and enhance Tennessee's lakes through investments both above and below the water at 18 lakes which bear the approval of fishing legend, Bill Dance. Touching 39 counties, **Bill Dance Signature Lakes** will benefit from increased stocking, habitat management, and improved access to fishing and boating. This effort seeks to solidify Tennessee as the heart of fishing in the southeast and drive economic activity across the state. Email Dennis.Tumlin@tn.gov for more information.

The Tennessee portion of the U.S. Civil Rights Trail inspires travel from visitors seeking to learn the stories of brave Americans who fought for racial equality by visiting sites in Memphis, Nashville and Clinton. Applications can be

Retire Tennessee continues to market the state's mild seasons, lower cost of living and slower pace of life to baby boomers. A record number of inquiries are showing that Tennessee is a popular retirement destination. Retirees are visitors first! Not only do they visit but they move and contribute to the economy. For more information, contact Zach.Ledbetter@tn.gov or visit retiretennessee.org.

The Tennessee Civil War Trail program is part of a multi-state effort that identifies, interprets, and creates driving tours of significant and lesser-known Civil War sites. Travelers who visit Civil War sites stay longer and spend more than the average visitor. Learn about the program at **cw.tnvacation.com**.

The Tennessee Music Pathways initiative connects visitors to the people,

places, and genres significant to music history. Tourism partners are encouraged to submit local music history and related assets that meet the criteria to be considered for inclusion. Explore tnmusicpathways.com.

The state statute annually designates the last full week of February as Tennessee Songwriters Week, designed to celebrate the foundation of the craft, recognize past and present songwriters and pave the way for future artists. Statewide events include in the-rounds, songwriter showcases, open-mic nights, educational workshops and more. For more information on how to get involved, please contact Jill.Kilgore@tn.gov or visit tnsongwritersweek.com.









TENNESSEE SPORT

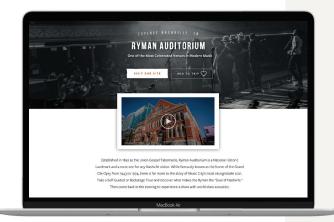




TNVACATION.COM

Every tourism partner is eligible for one or more FREE Partner pages on tnvacation.com. This complimentary web page is the building block of your exposure on Tennessee's official tourism website. Partners are encouraged to include restaurants, adventure outfitters, nature centers, historic landmarks, music venues, unique shops and upcoming events to tnvacation.com.

If you have multiple tourism businesses, such as a restaurant, winery and bed-and-breakfast, you are encouraged to have a Partner page for each. These can be linked together using the Related Partners field. Each Partner page is linked to the landing page for its region, subregion and city. It's also linked in relevant Experience pages, tourism categories and sub-categories.



MARKETING YOUR BUSINESS

To help travelers experience the best of Tennessee, we want tnvaction.com to highlight partners from across the state. Adding your partner page and keeping it up-to-date makes it easier for visitors to discover you and add you to their itinerary.

Where Your Page May Appear

- City Pages
- Division Pages
- Music Pathways
- Related Partner Pages
- Sub-Category Pages
- TDTD Articles
- Trip Planner

Please visit industry.tnvacation.com/industry/resources/partner-pages for complete details.



Rob Sherrill Special Projects Coordinator Rob.Sherrill@tn.gov 615-532-8124



The Soundtrack of America. Made in Tennessee. brand logo

BRAND GUIDELINES

The brand promise of Tennessee—the birthplace of the blues, bluegrass, country, gospel, rockabilly, soul and rock 'n' roll—is to be the global music destination of choice. To deliver an unparalleled experience of beauty, history and family adventure infused with music that creates a vacation that is *The Soundtrack of America. Made in Tennessee*.

Logo Usage

Use of the brand logo must be **pre-approved** by the TDTD marketing team. To ensure proper usage, partners should submit materials via email to their assigned Division Manager.



Jaisie Shahan Creative Services Manager Jaisie.Shahan@tn.gov 615-517-2507

Written Word

To helps us retain the power and integrity of *The Soundtrack of America. Made in Tennessee.* brand essence, please capitalize and italicize whenever it appears in a sentence, both digitally or in print. If italics are not available, quotation marks should be placed around the phrase. This also applies to *Made in Tennessee.*

Brand Fonts

Looking for web-safe fonts? Partners can find free, websafe typography online! Fonts including: Oswald Medium, Roboto Slab, and Roboto are free Google Fonts that we recommend using to ensure fonts display the same for all users. These fonts do not require special licensing and may be downloaded at no cost on **fonts.google.com**.





WELCOME CENTERS

The Tennessee Department of Tourist Development (TDTD) operates 16 Welcome Centers across the state. Welcome Centers are focused on increasing partner engagement and support through the development and promotion of



"community spotlight" itineraries at Welcome Centers which will work to increase visitation and visitor length of stay by encouraging travelers to explore destinations off the interstate around Welcome Centers. Contact Pete.Rosenboro@tn.gov for more information about this new initiative and how you can get involved.



Laura Munn

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Michael Ross Middle Regional Manager // 5, 6, 8, 12 Michael.Ross@tn.gov 931-449-0891



Pete Rosenboro

Assistant Commissioner Pete.Rosenboro@tn.gov 615-741-9035



Tami Giles

Welcome Center Coordinator Tami.Giles@tn.gov 615-741-9012



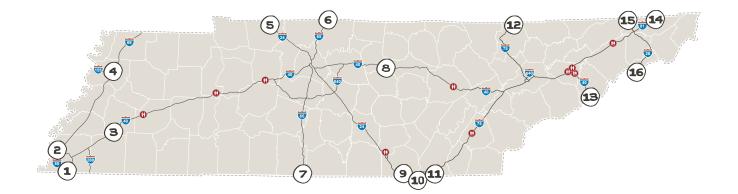
Toni Guffey Manager of Team Development Toni.M.Guffey@tn.gov 615-878-5933



Tammy Love West Regional Manager // 1, 2, 3, 4 Tammy.Love@tn.gov



Jim Elbert Southeast Regional Manager // 7, 9, 10, 11 James.H.Elbert@tn.gov 423-480-4109



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Tammy Love* 731-779-1212 Tammy.Love@tn.gov

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Don Townsend 931-648-5509 Don.Townsend@tn.gov

(6) I-65, ROBERTSON COUNTY

Eric Elizer 615-325-4721 Eric.Elizer@tn.gov

I-65, GILES COUNTY

Paula Clifton 931-468-2654 Paula.Clifton@tn.gov Shipping 3910 Interstate 55 (on the MS line) Mile Marker 3.10 Memphis, TN 38116

Shipping 119 North Riverside Drive Memphis, TN 38103

Shipping I-40 Westbound Mile Marker 44 Stanton, TN 38069

Shipping I-155 East (4 miles West of Dyersburg) Mile Marker 8.7 Dyersburg, TN 38024

Shipping I-24 Northwest of Nashville (on the KY line) Mike Marker 0.40 Clarksville, TN 37040

Shipping 6111 Lake Springs Road Portland, TN 37148

Shipping I-65 South of Nashville (on the AL line) Mile Marker 3 Ardmore, TN 38449 Mailing P.O. Box 16428 Memphis, TN 38186

Mailing 119 North Riverside Drive Memphis, TN 38103

Mailing P.O. Box 177 Stanton, TN 38069

Mailing P.O. Box 84 Dyersburg, TN 38025

Mailing P.O. Box 30187 Clarksville, TN 37040

Mailing 6111 Lake Springs Road Portland, TN 37148

Mailing P.O. Box 1166 Ardmore, TN 38449

8 I-40, SMITH COUNTY

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🧿 I-24, MARION COUNTY

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S) I-26, SULLIVAN COUNTY

Janice Martin 423-246-0214 Janice.Martin@tn.gov

16 I-26, UNICOI COUNTY Jackie Rains

423-743-4146 Jackie.Rains@tn.gov

* Regional Manager temporarily filling in as point of contact.

Shipping I-40 East of Nashville Mile Marker 267 Buffalo Valley, TN 38548

Shipping I-24 West of Chattanooga (on the AL line) Mike Marker 160 Jasper, TN 37347

Shipping 17180 Interstate 24, East Mile Marker 171.8 Chattanooga, TN 37419

Shipping 100 Interstate 75, North Mile Marker 0.7 East Ridge, TN 37412

Shipping I-75 South (on KY line) Mile Marker 161 Jellico, TN 37762

Shipping I-40 SE of Newport (on the NC line) Mile Marker 446 Hartford, TN 37753

Shipping 10749 Interstate 81, SB Mile Marker 75.3 Bristol, TN 37620

Shipping 5 Interstate 26 Mile Marker 5 Kingsport, TN 37664

Shipping 100 Fiddlers Lane Erwin, TN 37650 Mailing P.O. Box 11 Buffalo Valley, TN 38548

Mailing

P.O. Box 518 Jasper, TN 37347

Mailing P.O. Box 2037 Chattanooga, TN 37409

Mailing P.O. Box 9415 East Ridge, TN 37412

Mailing 16320 Interstate 75 Jellico, TN 37762

Mailing P.O. Box 100 Hartford, TN 37753

Mailing P.O. Box 3608 Bristol, TN 37625

Mailing P.O. Box 3083 Kingsport, TN 37664

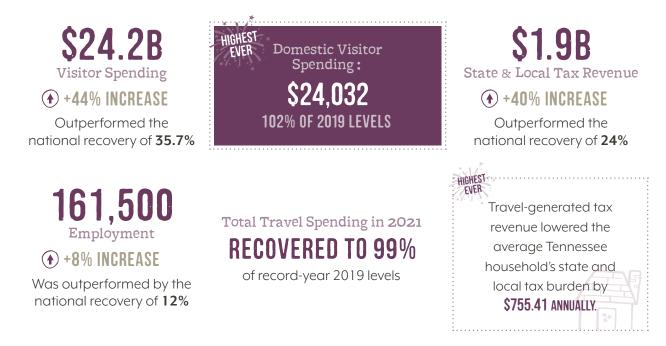
Mailing 100 Fiddlers Lane Erwin, TN 37650

25





2021 ECONOMIC IMPACT of Travel on Tennessee Total direct economic impact includes domestic and international travel | Source: USTA, Tourism Economics



All percent change calculations are over 2019, unless otherwise noted.

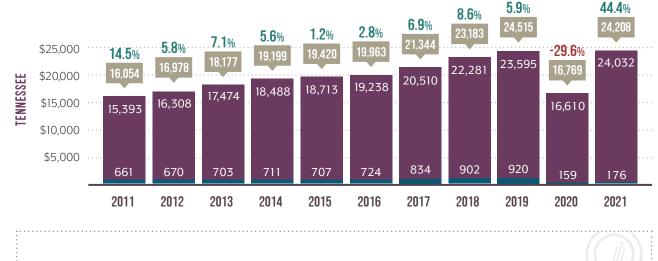
Total

Domestic

International

VISITOR SPENDING IN TENNESSEE

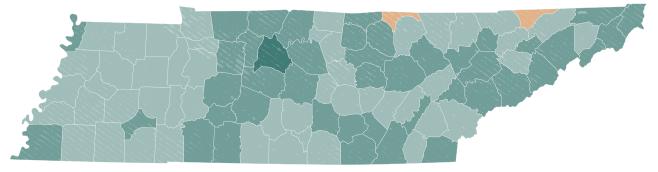
Amount in millions of nominal dollars and growth rate



Travelers in Tennesse spend an estimated \$66 MILLION PER DAY.

GROWTH RATE OVER 2020

0% 16% 32% 48%





VISITOR SPENDING RELATIVE TO 2019

80% 100% 120% 140%

51 COUNTIES were fully **recovered** & **exceeded** their 2019 visitor spending record.



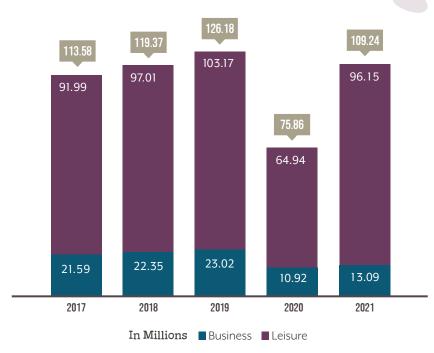
Details on the updated methodology/glossary of terms can be found on the final page of this document. All this data and more is now accessible through an interactive data visualization on **OUR INDUSTRY WEBSITE**.



Source: MMGY Global, D.K. Shifflet & Associates, Arrivalist

109.24M DOMESTIC PERSON-STAYS* Up 44% compared to 2020.

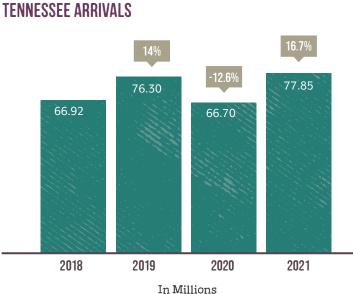
TENNESSEE PERSON-STAYS* VOLUME



While leisure travel increased by 48% over and business travel increased by 19.8% over 2020.

88% of person-stays* were leisure travelers.

Person-Stays: Total number of people or visitors that traveled to your destination, which includes Day-Trips of over 50 miles one-way or overnight trips.



77.85M Arrivals in 2021 Compared to 2020

Arrivals Criteria

- They traveled at least 50 miles from their home (home can be both TN residents as well as out-of-state residents)
- They spent a minimum of 5 hours within the state of TN
- They spent majority of trip time in TN

LEISURE & HOSPITALITY INDUSTRY Source: TN Department of Revenue and Department of Labor & Workforce Development



317K		\$1.52B		-	1.77B
Jobs	Sal	es & Use Tax Col		-	axable Sales
+8% INCREASE			\SE	(+38	% INCREASE
0VER 2020 91% of 2019 levels		0VER 2020 110% of 2019 le	vels	110% o	OVER 2020 f 2019 levels
		IRE & HOSPITALITY	an a ana		
		2019	2020	an a	2021
EMPLOYMENT (THOUSANDS)		347	293		317
SALES & USE TAX COLLECTIONS	S (\$ MILLIONS)	\$1,389	\$1,102	•	\$1,524
GROSS TAXABLE SALES (\$ BILLI	IONS)	\$19.85	\$15.74		\$21.77
ccommodations rts, Entertainment, & Recrea	ation		Revenues he LEVELS & d	ave recover outpaced in	
ccommodations rts, Entertainment, & Recrea	ation		LEVELS & d	outpaced in	nflation. 18ª
ccommodations rts, Entertainment, & Recrea bod Services & Drinking Plac	ation			outpaced in	nflation.
ccommodations rts, Entertainment, & Recrea bod Services & Drinking Plac \$100	ation		LEVELS & d	outpaced in	nflation. 18ª
\$50	ation		LEVELS & d	outpaced in	nflation. 18ª
sto state st	ation	-15%		outpaced in	nflation. 18ª
ccommodations rts, Entertainment, & Recrea bod Services & Drinking Plac \$100 \$50 \$50 -\$50	ation res	-15%		outpaced in	nflation. 18ª

L&H EMPLOYMENT VS TOTAL NONFARM EMPLOYMENT IN TENNESSEE

Percent of 2019 Employment, Monthly, Not Seasonally Adjusted



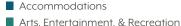


Since February 2022, Leisure & Hospitality Employment has returned to pre-pandemic levels but still struggles to keep up with travel demand.

After falling to roughly 60% of pre-pandemic levels in April 2020, L&H employment recovered its losses by February 2022. While jobs in the overall economy are up 4% over pre-pandemic levels, as of June 2022, L&H is up by 2%, an equivalent 7 thousand more jobs than 2019.

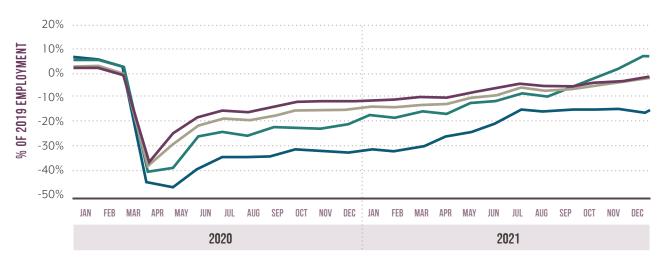
L&H EMPLOYMENT IN TENNESSEE BY INDUSTRY

Percent of 2019 Employment, Monthly, Not Seasonally Adjusted



Food Services & Drinking PlacesLeisure & Hospitality

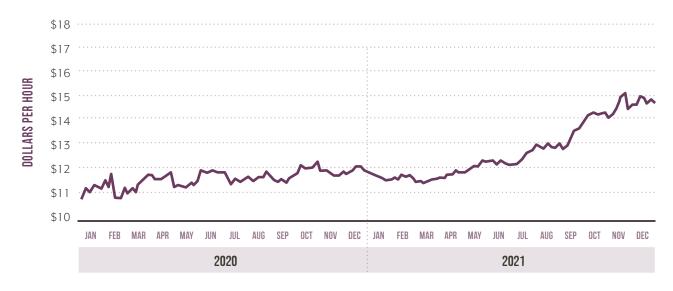
While Food & Beverage employment—which is also supported by local spending— was 2.2% above pre-pandemic levels in June, Arts, Entertainment & Recreation was up 12% and Accommodation was down -7%.



Source: Department of Labor & Workforce Development

L&H WAGES IN TENNESSEE

Average Hourly Earnings, Monthly, Not Seasonally Adjusted L&H wages have grown significantly since the summer of 2020, from \$14.14 in June 2020 to \$17.71 in June 2022. L&H wages were 20% above 2019 levels in June 2022 (+10% YOY) while overall private sector wages were 15% above 2019 levels (+7% YOY).



LEISURE & HOSPITALITY

- Arts & Entertainment by residents
- Recreation by residents
- Food services by residents
- Lodging by residents (such as people needing a hotel in home town due to home damage)
- Arts & Entertainment by visitors
- Recreation by visitors
- Food services by visitors
- Lodging by visitors

TRAVEL INDUSTRY

- Transportation by visitors (public, private used by visitors)
- Retail shopping by visitors
- Other services used by visitors (such as travel planning services as well as auto maintenance, parking fees, etc.)

This section focuses on the Leisure & Hospitality (L&H) industry as defined by the Bureau of Labor Statistics. We use it as a proxy for the travel industry as they have historically followed similar trends. Since the onset of the pandemic, the travel industry has suffered even greater losses than L&H.

Source: Department of Labor & Workforce Development

2021 DOMESTIC VISITOR ANALYSIS

Domestic travelers who have visited Tennessee or Kentucky in 2021

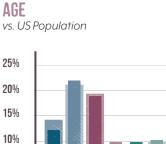
5%

0%

DEMOGRAPHICS

GENDER

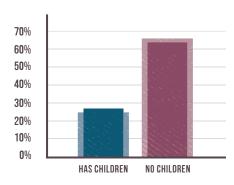




RELATIONSHIP STATUS

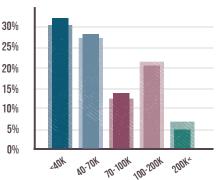


PRESENCE OF CHILDREN vs. US Population



HOUSEHOLD INCOME

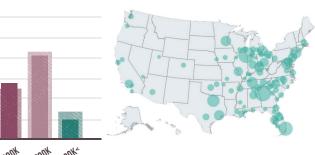
vs. US Population



18-24 25-34 35-44 45-49 50-54 55-59 60-64 65-69

METRO ORIGIN

within the United States



PSYCHOGRAPHICS

LIFESTYLE	
FOOD LOVERS	1.16X
SPORTS ENTHUSIASTS	1.12X
MONEY SAVERS	1.13X
OUTDOOR ENTHUSIASTS	1.08X

OPINIONS

I TEND TO PRIORITIZE SAVING MONEY ON TRAVEL THAN OTHER PURCHASES	1.24X
I OFTEN SEEK ADVICE FROM OTHERS WHEN MAKING PURCHASE DECISIONS	1.16X
I FREQUENTLY WISH I HAD MORE TIME TO SPEND WITH FAMILY	1.10X

Source: Helixa/Simmons, Research Sample: 9,409,556, Traveled domestically to Tennessee or Kentucky in 2021

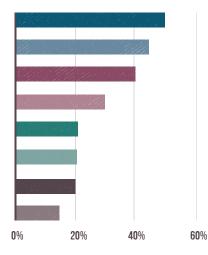
TOP STATES VISITED OTHER THAN TN

FLORIDA	23.99 %
ALABAMA/GEORGIA	21.12%
OHIO/INDIANA/ILLINOIS	20.53 %
NORTH CAROLINA/SOUTH CAROLINA	19.37 %
TEXAS	12.46 %
MISSISSIPPI/LOUSIANA	12.11%
MICHIGAN/WISCONSIN	11.03 %
VIRGINIA/WEST VIRGINIA	10.18 %

TOP VACATION ACTIVITES

GENERAL SIGHTSEEING	45.97 %
SHOPPING	36.21%
VISIT NATIONAL PARKS	24.66 %
VISIT CULTURE/HISTORIC SITE	23.13%
BACKPACKING/HIKING	20.51 %
ATTEND SPECIFIC EVENT	19.30 %
OUTDOOR SPORTS/RECREATION	17.78%
FINE DINING	18.92 %

TRAVEL ATTITUDES: AGREE COMPLETELY



50.43 %	I'D RATHER BOOK A TRIP ON THE INTERNET
44.96 %	I LIKE TO TRY LOCAL CUISINE WHEN I TRAVEL
41.81 %	I LOVE DOING RESEARCH ON A LOCATION BEFORE I GO
33.78 %	ON MY VACATIONS, I PREFER TRAVELING TO PLACES I'VE NEVER BEEN
22.74 %	I FREQUENTLY CHOOSE ACTIVE VACATIONS WITH LOTS TO DO
21.52 %	I'M OK VACATIONING ALONE
20.90 %	TRAVEL & HOTEL DISCOUNTS HAVE A LARGE INFLUENCE IN WHERE I DECIDE TO GO
16.65 %	I SEEK ADVENTURE AND THRILLS ON MY VACATIONS

TRAVELED PARTY - ANY TRIP

SPOUSE	65.10%
CHILDREN UNDER 18	33.79%
YOURSELF (ALONE)	31.82%
FRIENDS	18.36%
OTHER	19.86%

HOW LONG BEFORE TRAVELING DO YOU BOOK?

3-6 MONTHS	33.71 %
1 WEEK - 3 MONTHS	25.35%
MORE THAN 6 MONTHS	11.45%
1 WEEK	02.62 %





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ADMINISTRATION SERVICES

Administrative Services is committed to providing best in class customer service and professional business support to our stakeholders while being good stewards of tax dollars. The division responds to over 8,000 requests annually. These range from individual travelers wanting maps, guides and various travel related information to bulk requests by partner travel and tourism organizations. Additionally, the team manages the Tourism Information phone line as well as distribution services for the Official Tennessee Vacation Guide, State Highway maps and other printed marketing collateral.



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