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# TENNESSEE®



TENNESSEE COVID-19 RESEARCH & INSIGHTS

01.19.2021





# TRAVEL RESEARCH PARTNERS

## IMPACT & FORECASTING

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## SENTIMENT

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## CONSUMER BEHAVIOR

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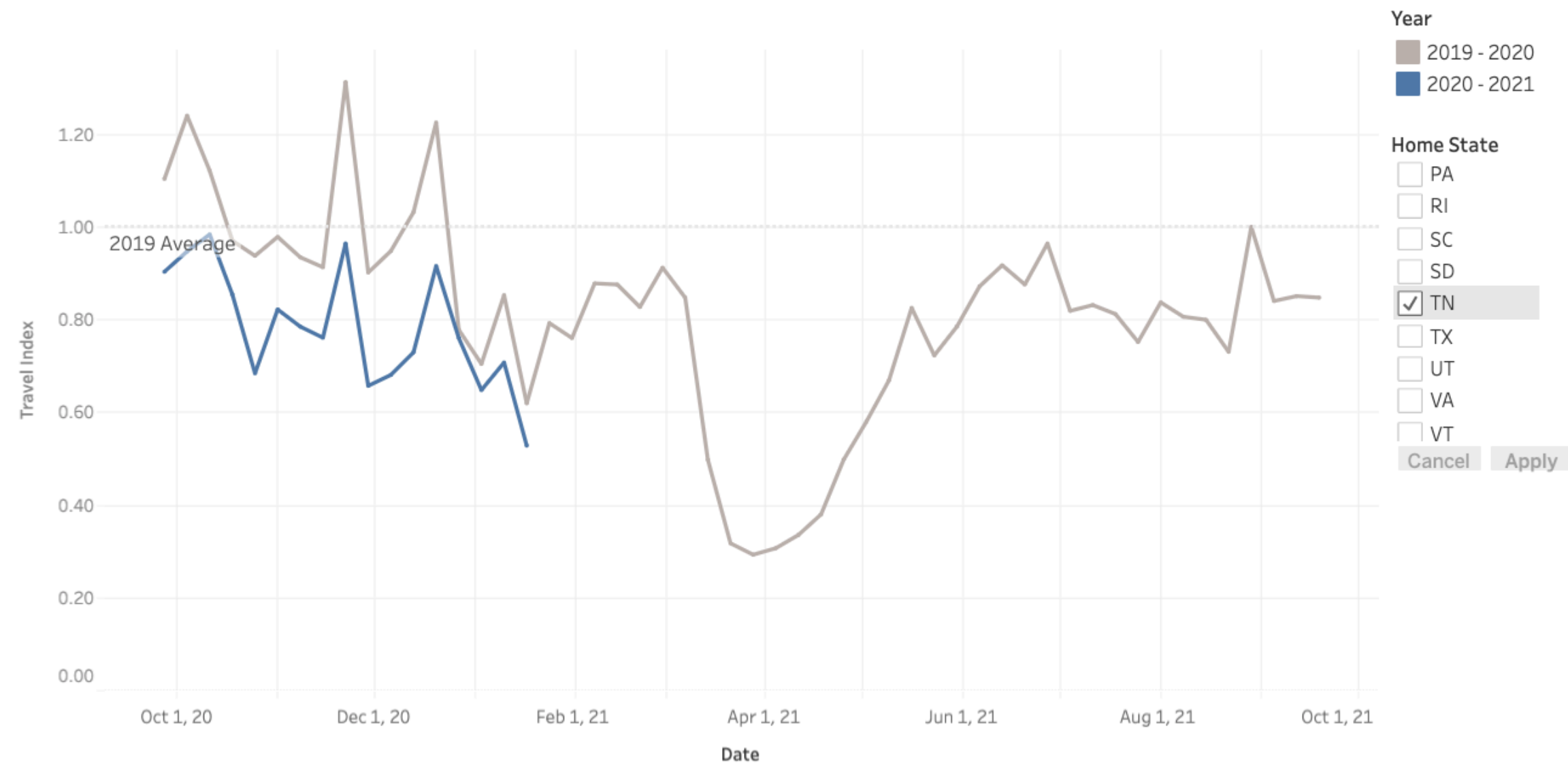


# TENNESSEE HOME STATE WEEKLY TRAVEL INDEX DOWN -9.6% OVER THE PREVIOUS YEAR (1/3-1/9)

## Arrivalist US Daily Travel Index

Daily Index YoY	Last 7 Days YoY	Last 30 Days YoY
<b>-14.7%</b>	<b>-9.6%</b>	<b>-18.2%</b>
Jan 17, Sunday	Jan 11 - Jan 17	Dec 19 - Jan 17

Time Period: Year to Date  
 Show View: Weekly



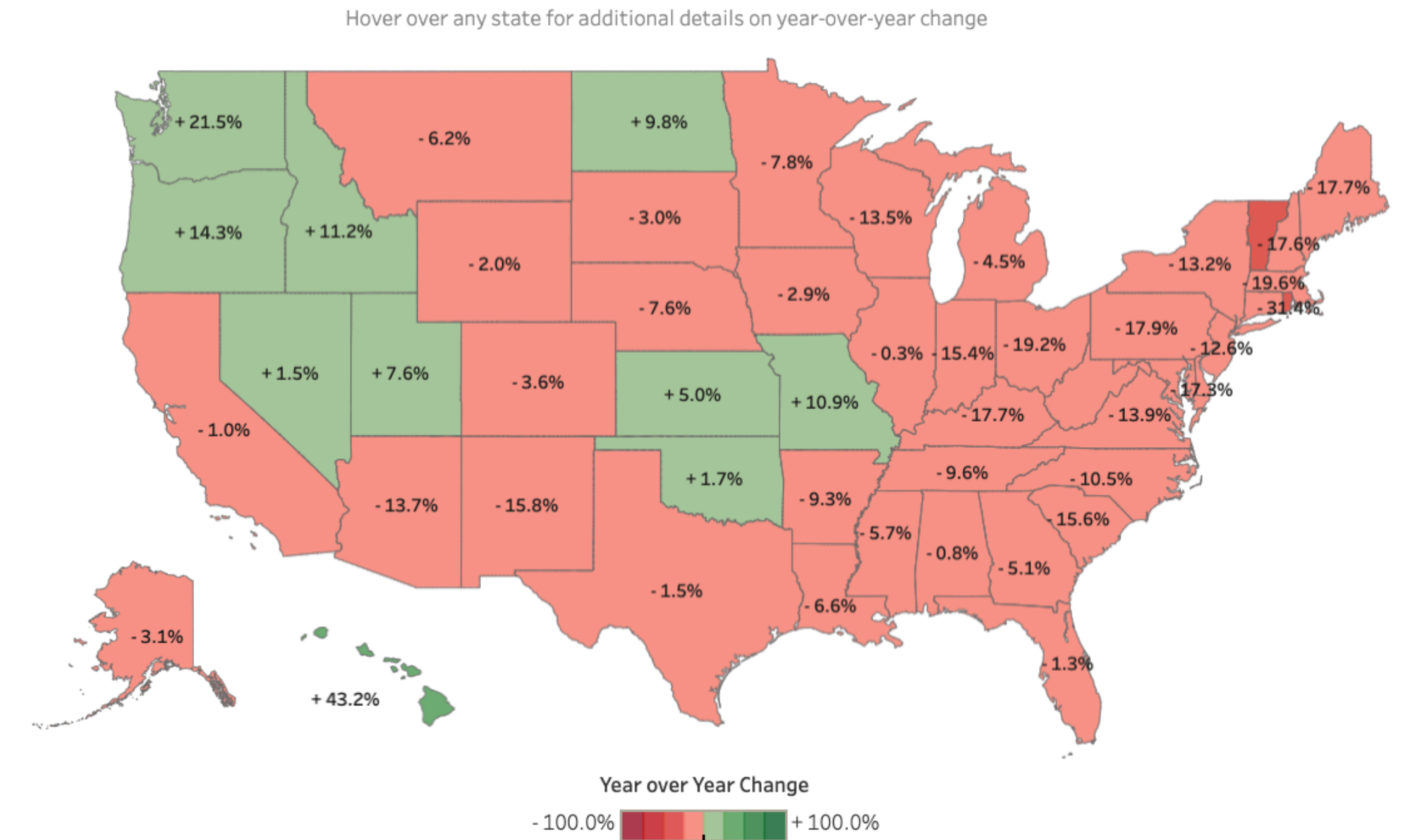
Daily drive market index of US travelers who moved at least 50 miles from home and spent a minimum of 2 hours on their journey. The index is based on the average daily volume of 2019 travelers.  
 Last Updated: Jan 17, 2021

Tennessee

## Arrivalist US Year over Year Change

Daily Index YoY	Last 7 Days YoY	Last 30 Days YoY
<b>-19.2%</b>	<b>-6.2%</b>	<b>-16.8%</b>
Jan 17, Sunday	Jan 11 - Jan 17	Dec 19 - Jan 17

Time Period: Last 7 Days



Daily drive market index of US travelers who moved at least 50 miles from home and spent a minimum of 2 hours on their journey. The Year over Year is based on relative Index change to 2019.  
 Last Updated: Jan 17, 2021

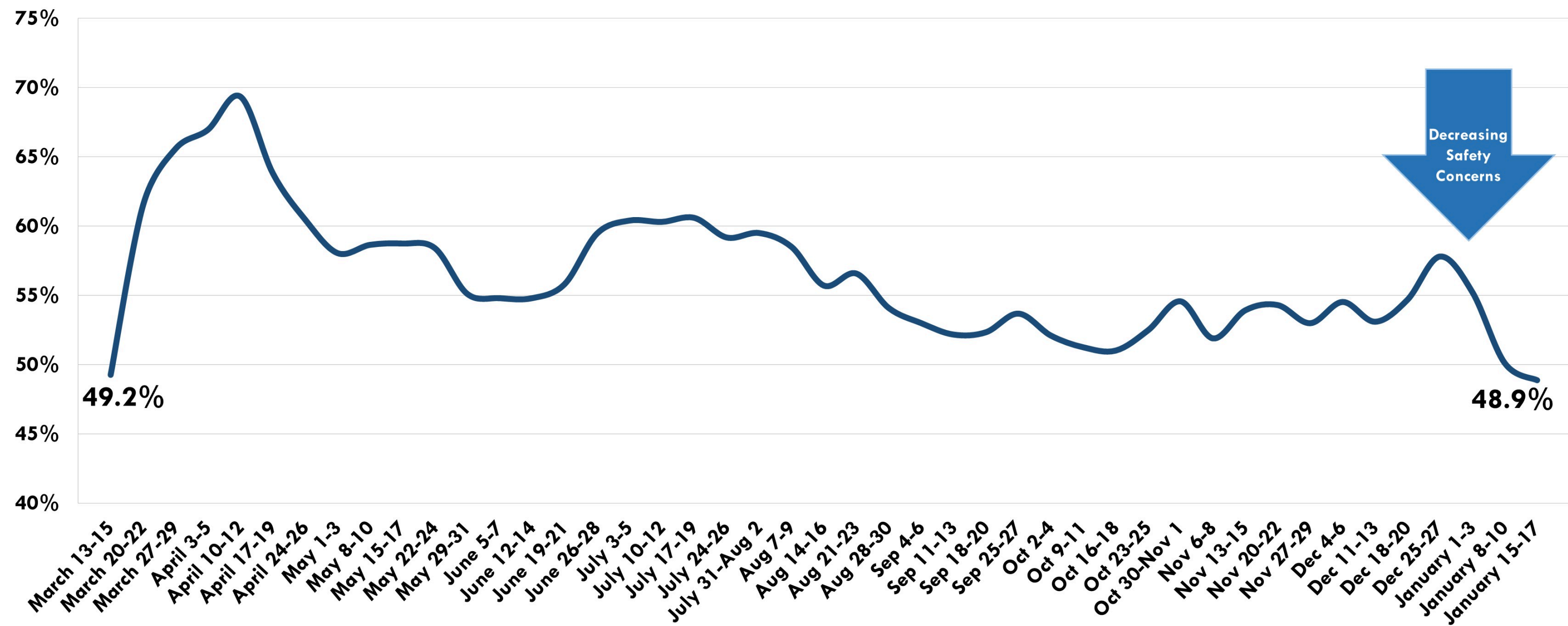
U.S.



# THE PERCEPTIONS OF TRAVEL AND LEISURE ACTIVITIES AS UNSAFE CONTINUES TO DROP AND REACHED A PANDEMIC LOW OF 48.9%.

## PERCEPTION OF TRAVEL & LEISURE ACTIVITIES AS UNSAFE MARCH 15, 2020 – JANUARY 17, 2021

% of American Travelers Rating as “Somewhat Unsafe” or “Very unsafe”—Average Score for All Activities Tested



**QUESTION: AT THIS MOMENT, HOW SAFE WOULD YOU FEEL DOING EACH TYPE OF TRAVEL ACTIVITY?**

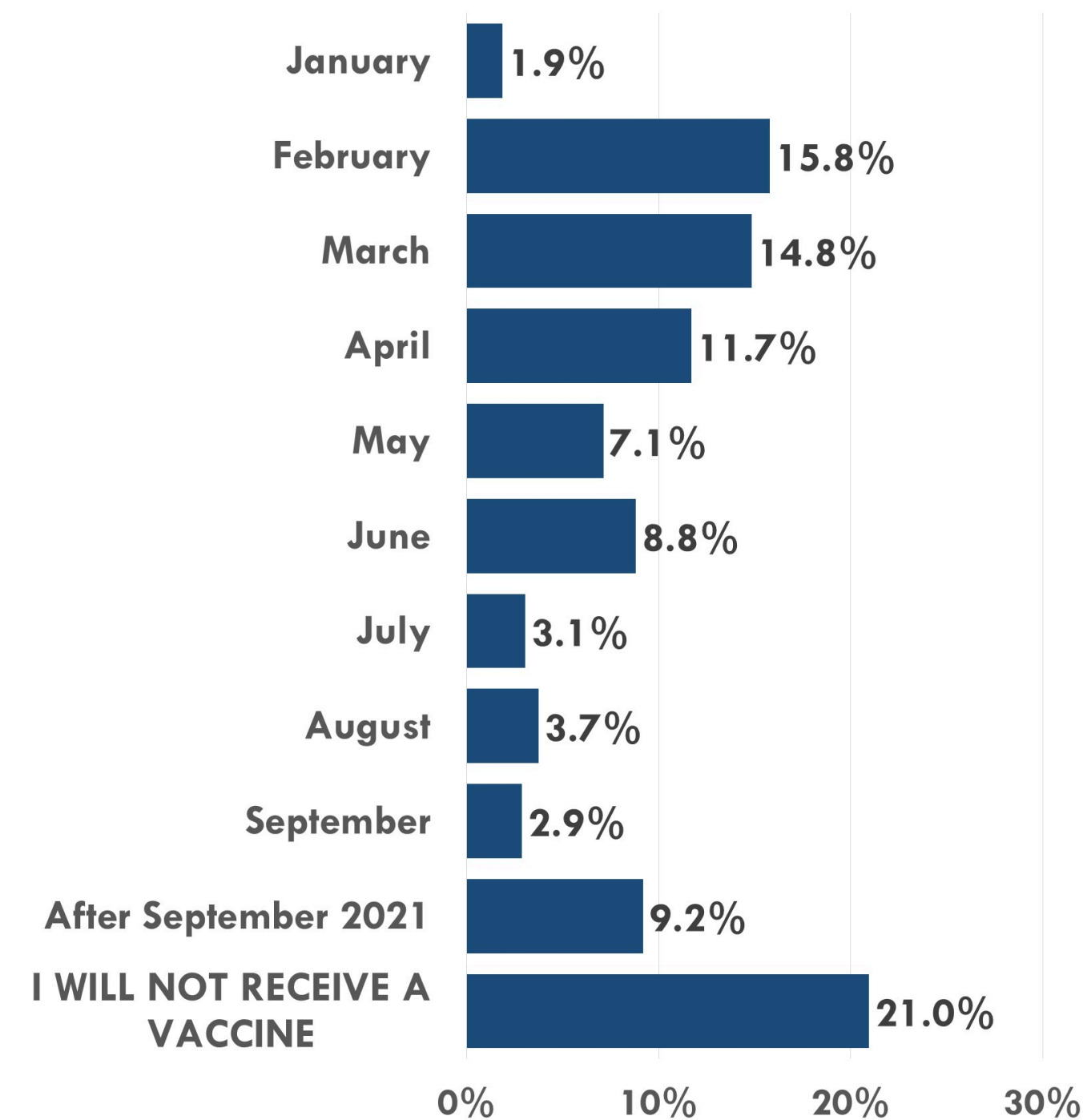
(Base: Waves 1-45. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225 and 1,205 completed surveys.)





INTERESTINGLY, TRAVELERS IN THE SOUTH ARE MORE THAN TWICE AS LIKELY TO SAY THEY WON'T RECEIVE A VACCINE AS THOSE IN OTHER REGIONS OF THE COUNTRY.

**WHEN AMERICAN TRAVELERS EXPECT TO BE VACCINATED  
AS OF JANUARY 17<sup>TH</sup>**



**EXPECTED VACCINATION  
BY JUNE 2021**

**BY GENERATION:**

Millennials/Gen Z: 52.7%  
Gen X: 56.5%  
Boomers: 68.6%

**BY REGION:**

West: 66.9%  
Midwest: 61.3%  
Northeast: 62.8%  
South: 54.3%

**QUESTION: GIVEN WHAT YOU KNOW NOW, IN WHICH MONTH DO YOU EXPECT TO RECEIVE A VACCINE? (SELECT ONE)**

**(IF YOU ARE UNCERTAIN, SELECT THE MONTH YOU THINK IT IS MOST LIKELY YOU WILL GET A VACCINATION)**

*(Base: Waves 45 data. Respondents who have not yet been vaccinated, 1,018 completed surveys.  
Data collected January 15-17, 2021)*

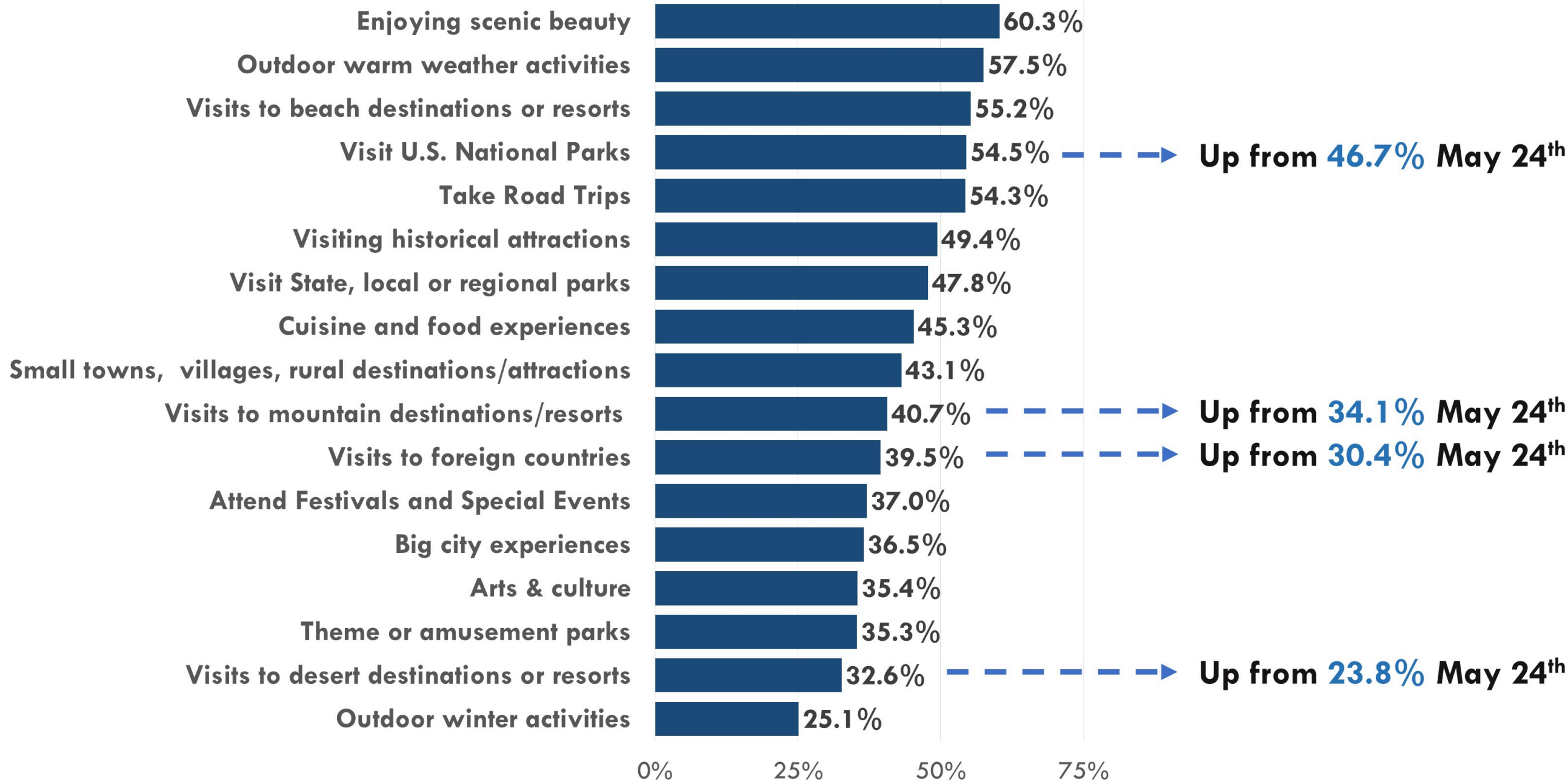




AMERICAN TRAVELERS ARE STILL VERY INTERESTED IN OUTDOOR EXPERIENCES SUCH AS SCENIC BEAUTY, OUTDOOR ACTIVITIES, AND PARKS.

**TRIP CHARACTERISTICS OF INTEREST IN 2021  
AS OF JANUARY 17<sup>TH</sup>**

*% of American Travelers Rating as "Interested" or "Very Interested"*



**QUESTION: IN GENERAL HOW INTERESTED ARE YOU IN TAKING LEISURE TRIPS WHICH WOULD INCLUDE THE FOLLOWING:**

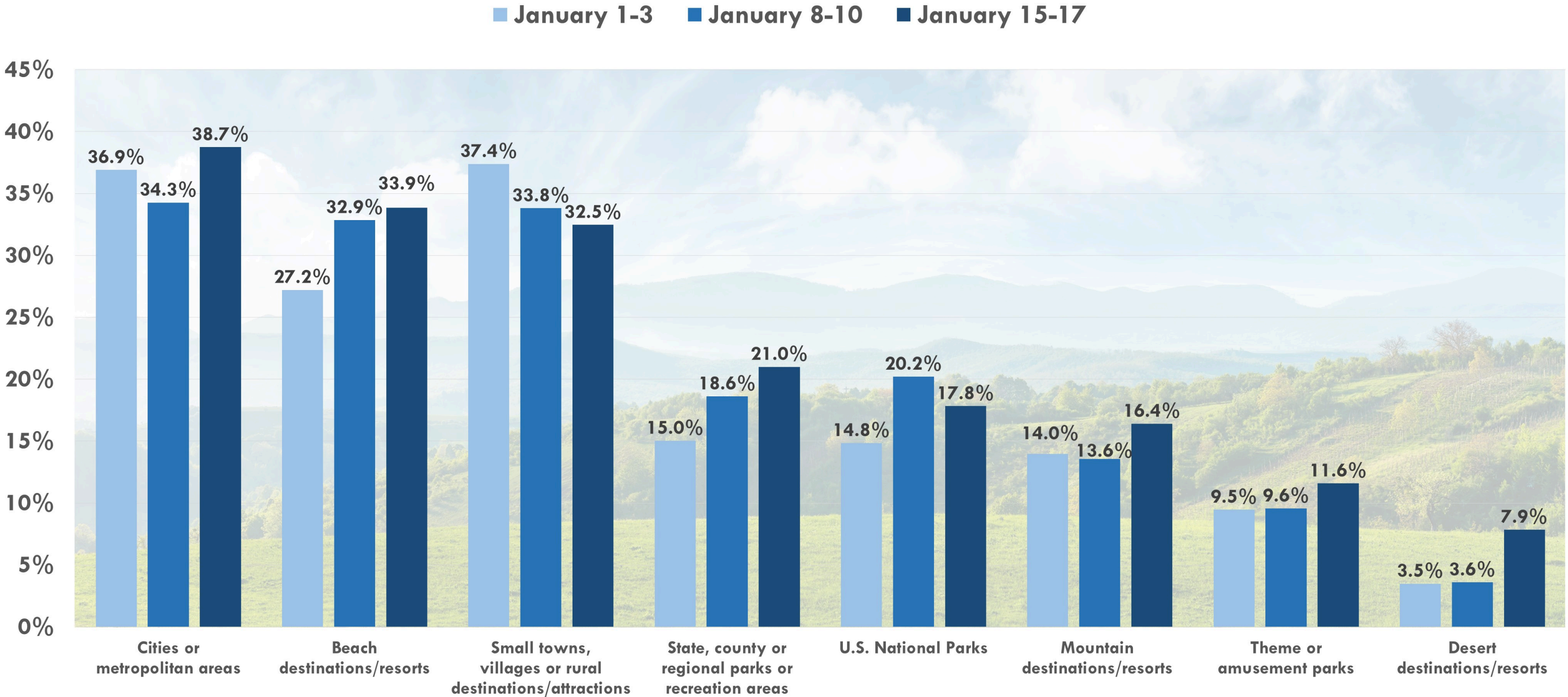
*(Base: Waves 45 data. All respondents, 1,205 completed surveys. Data collected January 15-17, 2021)*





IN TOTAL, 47.6% OF AMERICAN TRAVELERS EXPECT TO TAKE A TRIP IN THE NEXT 12 WEEKS. MOST ARE EXPECTED TO TRAVEL TO CITIES AND BEACHES AS WELL AS SMALL TOWNS.

**DESTINATION TYPES AMERICANS EXPECT TO TRAVEL TO IN THE NEXT THREE MONTHS  
(WEEKS OF JANUARY 1<sup>ST</sup> – JANUARY 17<sup>TH</sup>)**



**QUESTION: ON THESE LEISURE TRIPS, WHICH OF THE FOLLOWING ARE YOU EXPECTING TO VISIT?**

*(Base: Waves 43-45 data. Respondents who expect to take at least one leisure trip during the next three months, 436, 587, 596 completed surveys.)*





# THE FIRST TRIP TRAVELERS PLAN ON TAKING IN 2021 ARE TO VISIT FRIENDS AND RELATIVES AND WITHIN 200 MILES IN THE U.S.

## IMPACT ON TRAVEL PLANS

### First Trip Travelers Will Take in 2021

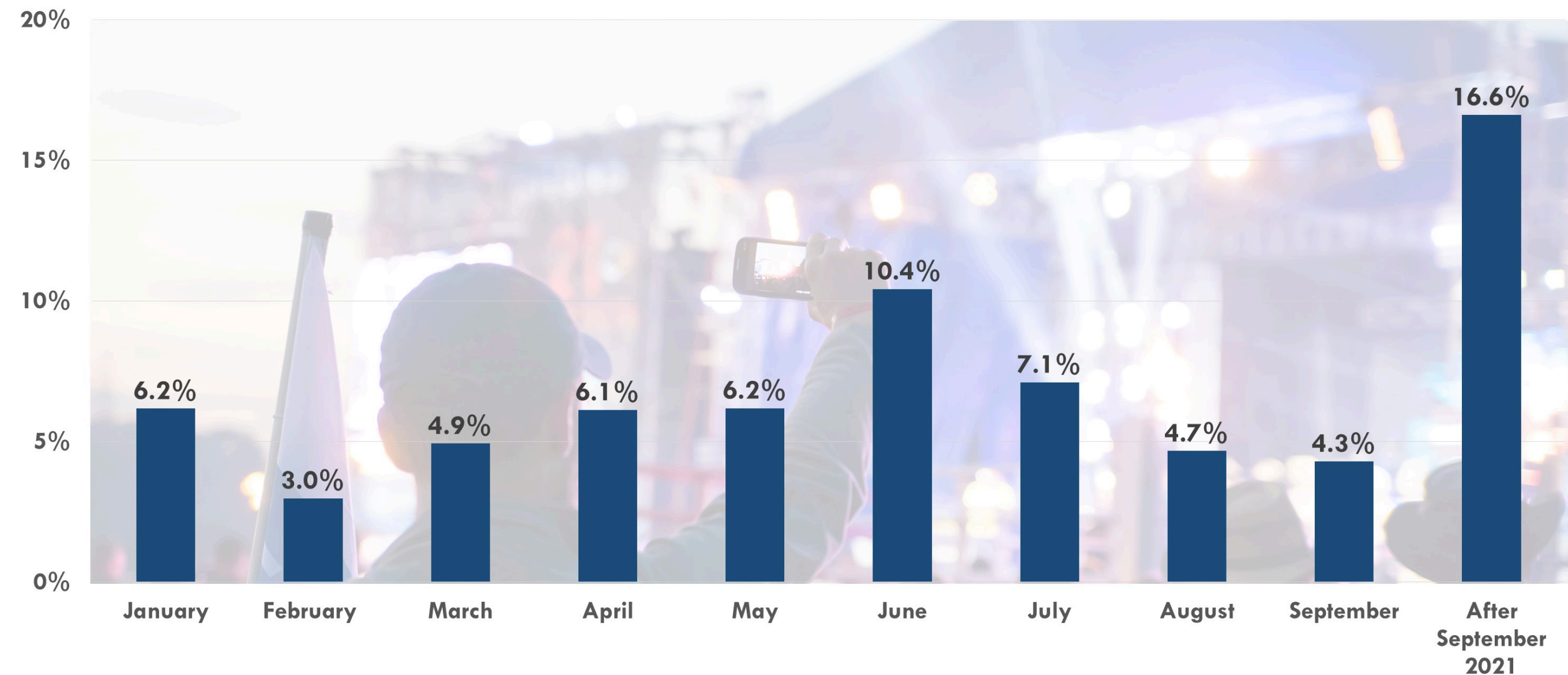




**RIGHT NOW, OVER A THIRD (36.8%) SAY THEY WOULD BE COMFORTABLE TRAVELING TO ATTEND SUCH AN EVENT BY JUNE; THE REST NEED MORE TIME.**

### **WHEN AMERICANS EXPECT THEY WILL BE COMFORTABLE TRAVELING FOR LIVE EVENTS & FESTIVALS AS OF JANUARY 17, 2021**

*Expected Month Among American Travelers Who Attend Live Events/Festivals*



**QUESTIONS: WHEN (AT THE SOONEST) DO YOU EXPECT YOU WILL FEEL COMFORTABLE ATTENDING A LIVE EVENT OR FESTIVAL WHILE TRAVELING? (I.E., AT A PLACE 50-MILES OR MORE AWAY FROM YOUR HOME) (SELECT ONE)**

*(Base: Wave 45 data. Respondents who attend live events, 1,047 completed surveys.)*

*Data collected January 15-17, 2021)*





# KEY TAKEAWAYS

1

Americans continue to show that they believe better days are in sight. The percent of Americans who feel the pandemic situation in the U.S. will get worse in the next month fell another 6.5% this week to 43.2%, the lowest it has been since September 27th.

2

Over two-thirds expect they will be vaccinated by June. Boomer travelers are far likelier than younger travelers to feel that the COVID vaccines are safe. Interestingly, travelers in the South are more than twice as likely to say they will not get the vaccine.

3

In terms of what Americans are looking for in travel experiences in 2021, right now scenic beauty, outdoor activities in warm weather, beach destinations and resorts, National Parks and road trips are predominant in their minds. With the virus still raging, big city and food experiences do not weigh as heavy as they did in pre-pandemic times.

4

Looking at strategies to combat the spread of COVID-19 at events, if all attendees were required to take a COVID-19 test and present a negative result to enter the event, 45.2% of American travelers said this would make them more comfortable. If all attendees were required to show proof of vaccine, 51.0% said this would make them more comfortable attending.