

TENNESSEE COVID-19 RESEARCH & INSIGHTS 04.13.2021





TRAVEL RESEARCH PARTNERS

IMPACT & FORECASTING



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SENTIMENT

The Harris Poll Harris Insights & Analytics LLC, A Stagwell Company

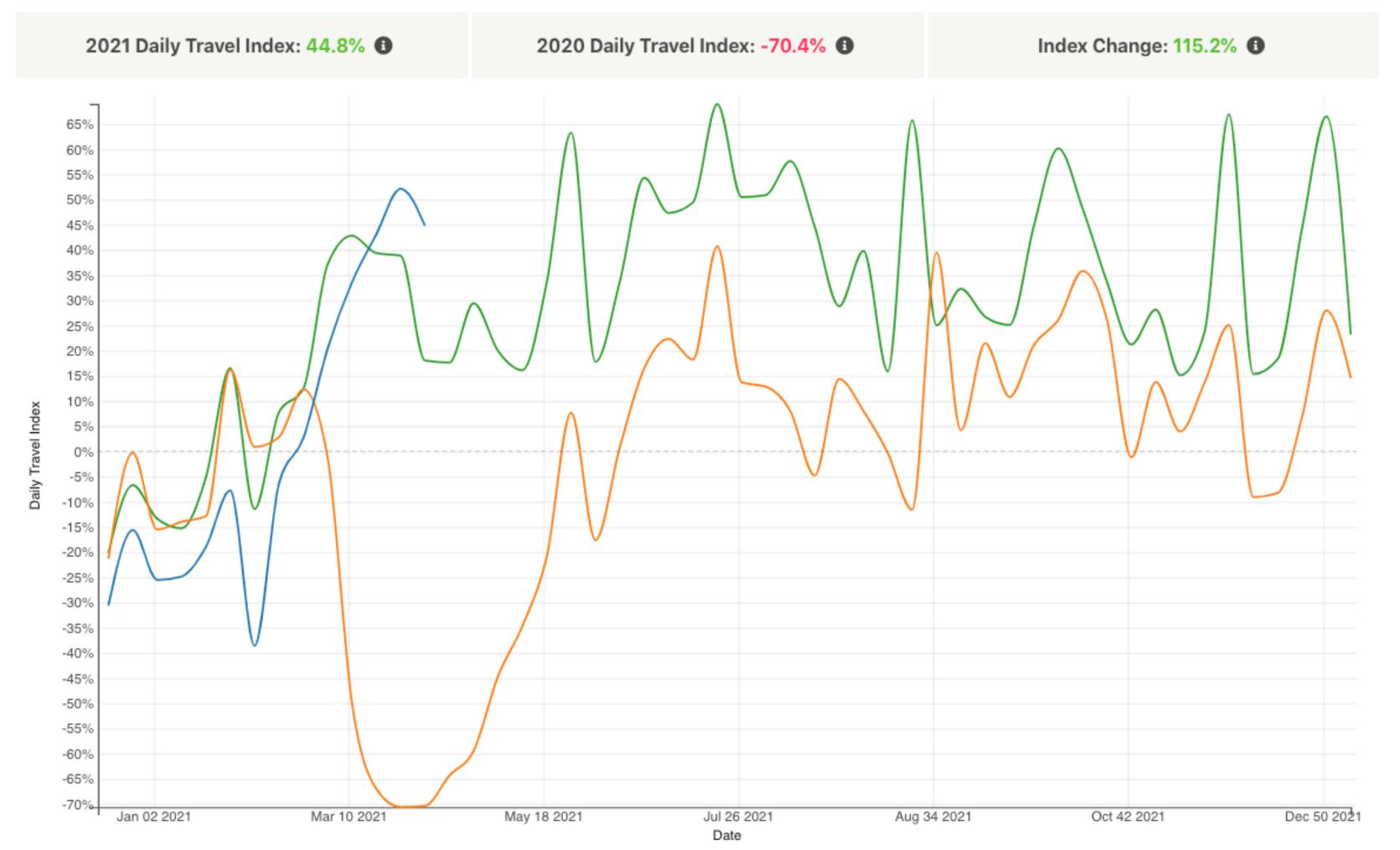
CONSUMER BEHAVIOR





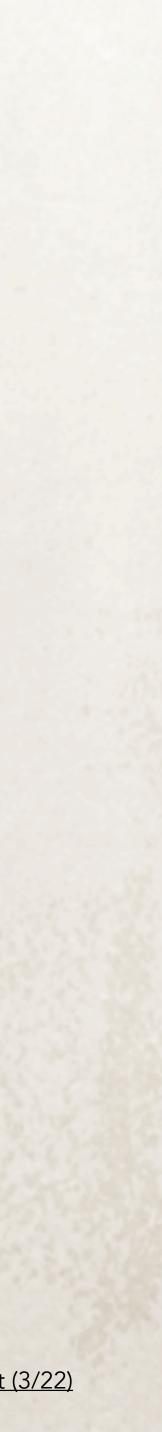


THE 2021 TENNESSEE TRAVEL INDEX SURPASSES 2019 LEVELS AT THE END OF MARCH.



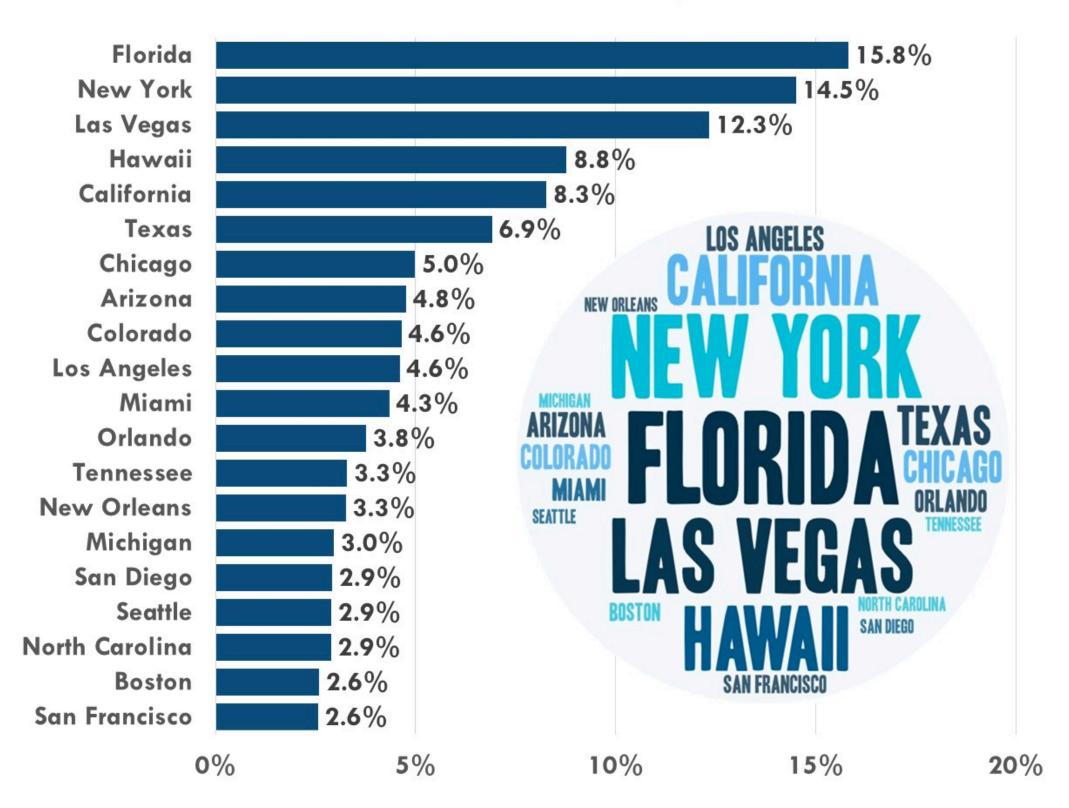
Daily drive market analysis of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours on their journey. The Daily Travel Index is the relative daily volume of travelers compared to the average number of daily travelers Feb 01, 2020 to Feb 28, 2020. The Daily Volume is a projection of trips taken by a weighted panelist cohort.

View	
Year Over Year	
Years to Compare	
All selected	
Date Group By 🚯	
Week	
Origin Region	
All selected	
Origin Distance	
All selected	
Overnight Stays	
0 Nights	30+ Nights
Apply Save	Clear
2021	
2020	



AS AMERICANS LOOK FORWARD TO TRAVELING IN THE MONTHS AHEAD, TENNESSEE REMAINS IN THE TOP MOST DESIRED DOMESTIC DESTINATIONS.

AMERICANS' MOST DESIRED DOMESTIC DESTINATIONS TOP 20 AS OF APRIL 11, 2021



QUESTION: WHICH DOMESTIC DESTINATIONS DO YOU MOST WANT TO VISIT THIS YEAR? (WRITE IN UP TO THREE)

(PLEASE ONLY INCLUDE DESTINATIONS IN THE UNITED STATES)

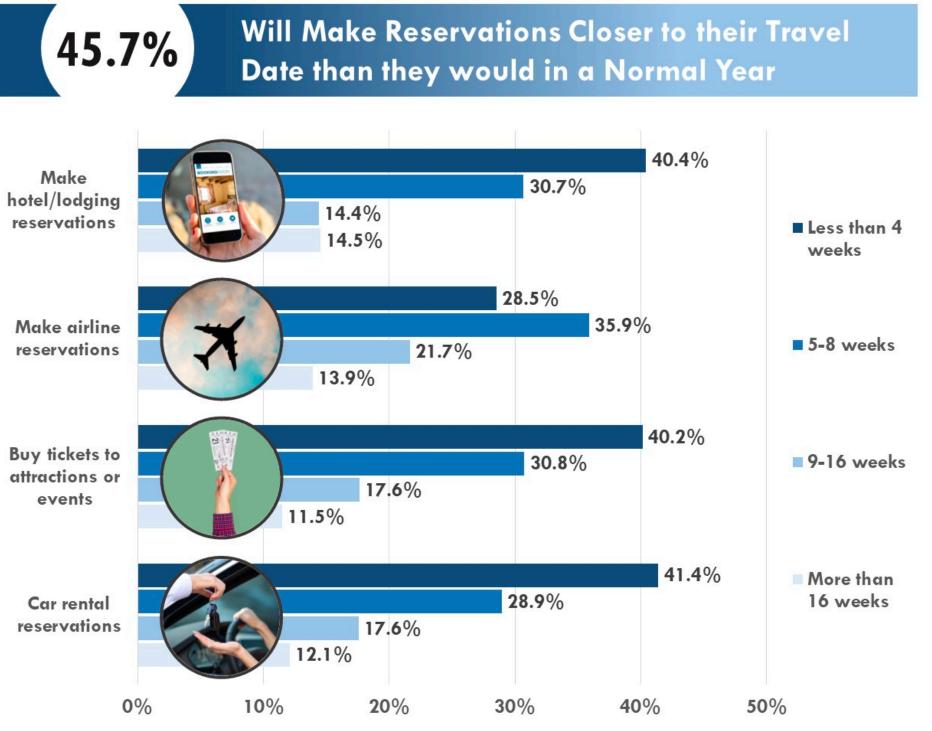
(Base: Wave 57 data. All respondents, 1,202 completed surveys. Data collected April 9-11, 2021)





IN TOTAL, 45.7% SAY THEY WILL MAKE RESERVATIONS CLOSER TO THEIR TRAVEL DATE THAN THEY WOULD IN A NORMAL YEAR.

HOW FAR IN ADVANCE AMERICANS WILL BOOK TRAVEL AS OF APRIL 11, 2021



QUESTION: FOR YOUR NEXT LEISURE TRIP, HOW FAR IN ADVANCE WILL YOU (OR DID YOU ALREADY) BEGIN MAKING RESERVATIONS? FOR EACH OF THE FOLLOWING, PLEASE USE THE SCALE TO STATE HOW FAR IN ADVANCE YOU WILL (OR DID) START MAKING YOUR RESERVATIONS.

(Base: Wave 57 data. Respondents who expect to take 1 or more trip(s) in 2021, 960 completed surveys. Data collected April 9-11, 2021)

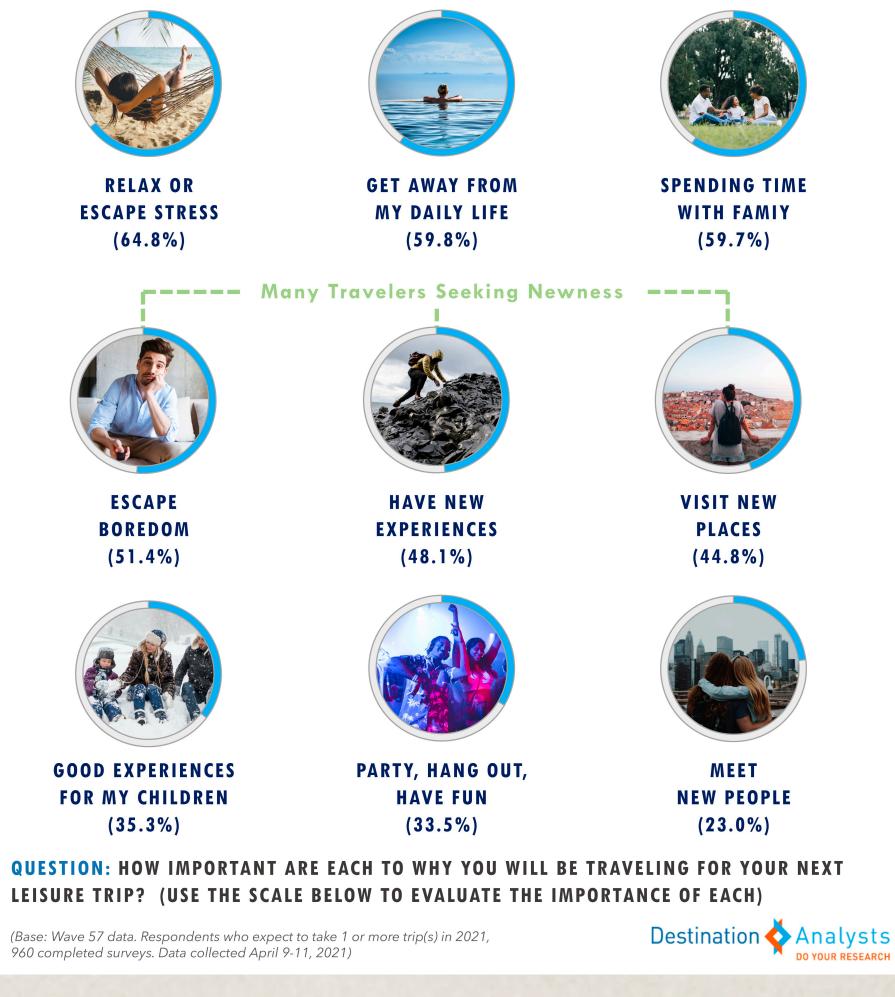




ABOUT HALF ARE HIGHLY SEEKING ESCAPING BOREDOM, HAVING NEW EXPERIENCES AND VISITING NEW PLACES THEY HAVE NEVER BEEN.

MOTIVATIONS BEHIND AMERICANS' NEXT LEISURE TRIP AS OF APRIL 11, 2021

(Percent rating each as "Important" or "Critically important")



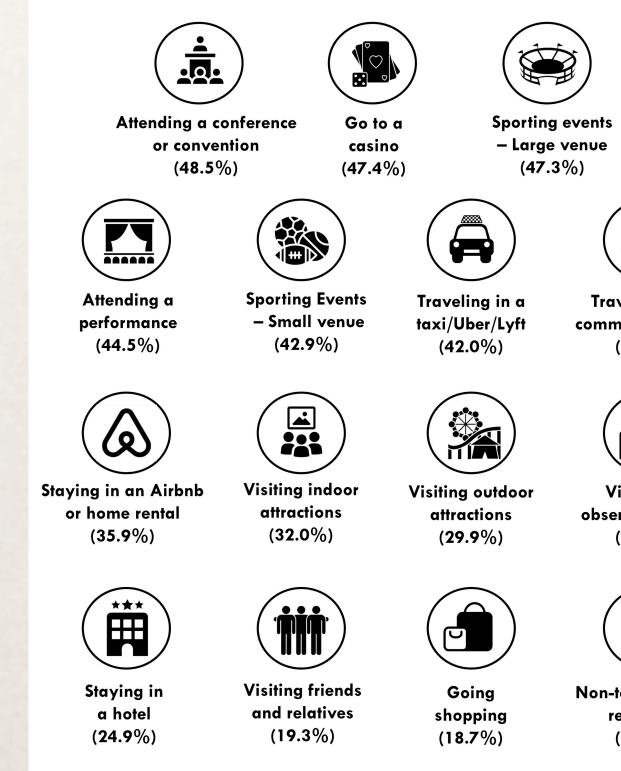
960 completed surveys. Data collected April 9-11, 2021)



THE AVERAGE PERCEPTION OF TRAVEL ACTIVITIES AS UNSAFE IS DOWN 20 PERCENTAGE POINTS FROM JANUARY 1ST—A PANDEMIC RECORD LOW (37.9%).

FEW TRAVEL ACTIVITIES REMAIN LARGELY PERCEIVED AS UNSAFE AS OF APRIL 11, 2021

A MAJORITY NO LONGER FEEL UNSAFE WITH:



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

(Base: Wave 57 data. All respondents, 1,202 completed surveys. Data collected April 9-11, 2021)



Train travel (intercity travel) (45.9%)



Traveling for

business reasons

(38.2%)

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Traveling on a commercial airline (40.9%)



Visiting an observation deck (29.1%)



Non-team outdoor recreation (18.3%)

Dining in a restaurant (28.6%)



Taking a road trip (13.9%)

A MAJORITY STILL FEEL UNSAFE WITH:



Traveling on a cruise line (57.0%)



Intercity bus travel (55.6%)



Traveling outside the **United States** (56.0%)



Traveling by bus or motor coach on a group tour (54.5%)

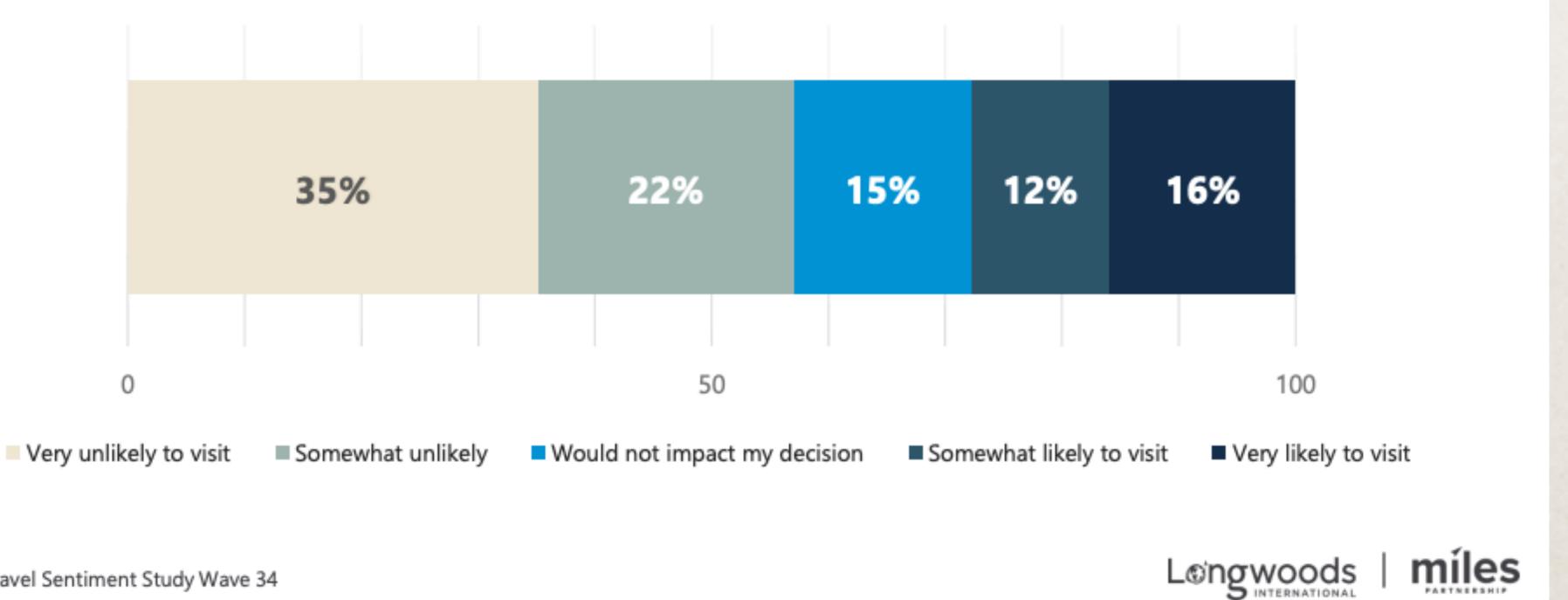




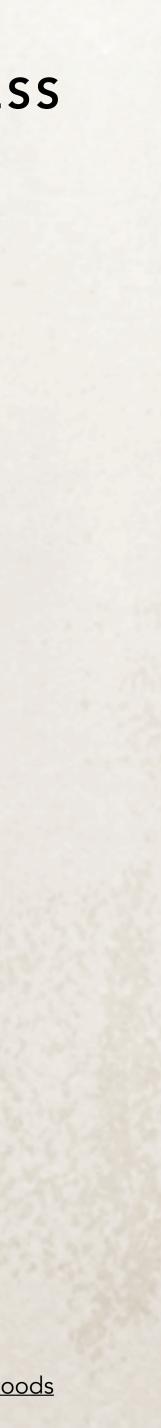
LESS THAN A THIRD OF TRAVELERS ARE LIKELY TO VISIT A TOURISM ATTRACTION OR BUSINESS WHICH DOES NOT HAVE CLEAR COVID SAFETY PROTOCOLS.

TRAVEL PERCEPTIONS

How likely are you to visit a tourism attraction or business that does not have clear protocols or mask and distancing requirements in place?



Travel Sentiment Study Wave 34



ABOUT 52.0% SAID THEY WOULD BE COMFORTABLE OR VERY COMFORTABLE WHEN ASKED HOW COMFORTABLE THEY WOULD BE WITH VACCINE PASSPORTS BEING USED WIDELY IN THE U.S.

AMERICANS COMFORT WITH COVID PASSPORTS **& PROOF OF VACCINATION REQUIREMENTS AS OF APRIL 4, 2021**

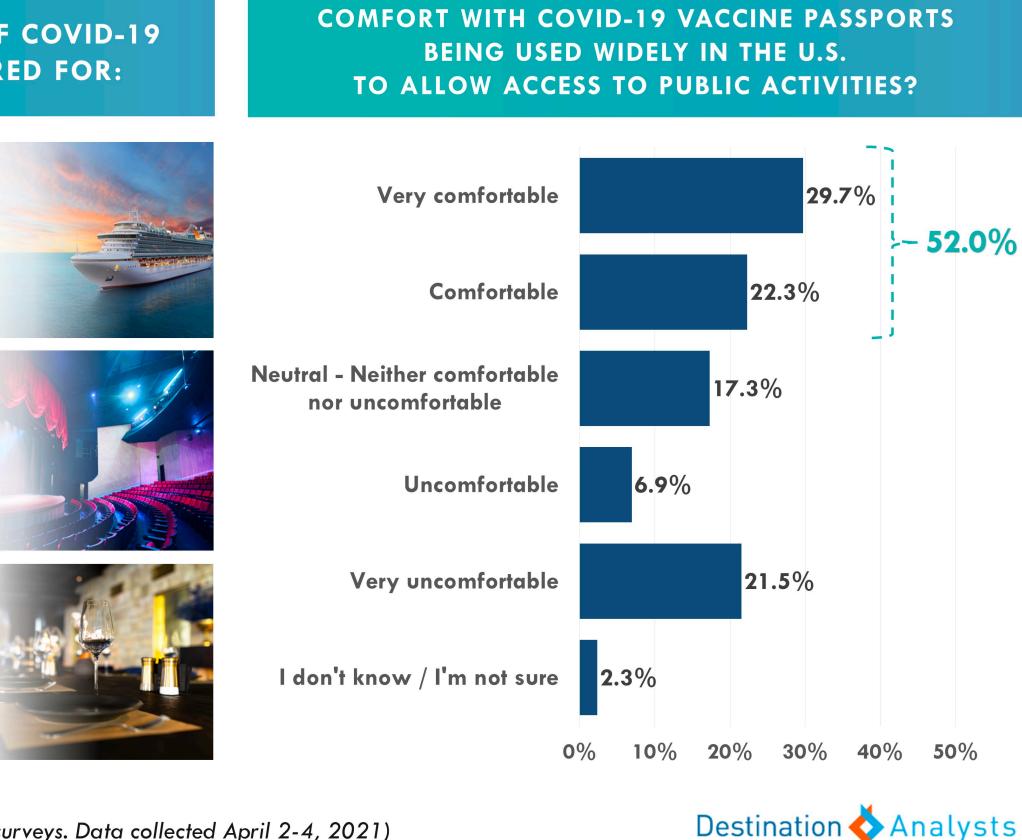
AMERICANS WHO BELIEVE PROOF OF COVID-19 **VACCINATION SHOULD BE REQUIRED FOR:**

72.9%

Entry to the U.S. from another Country



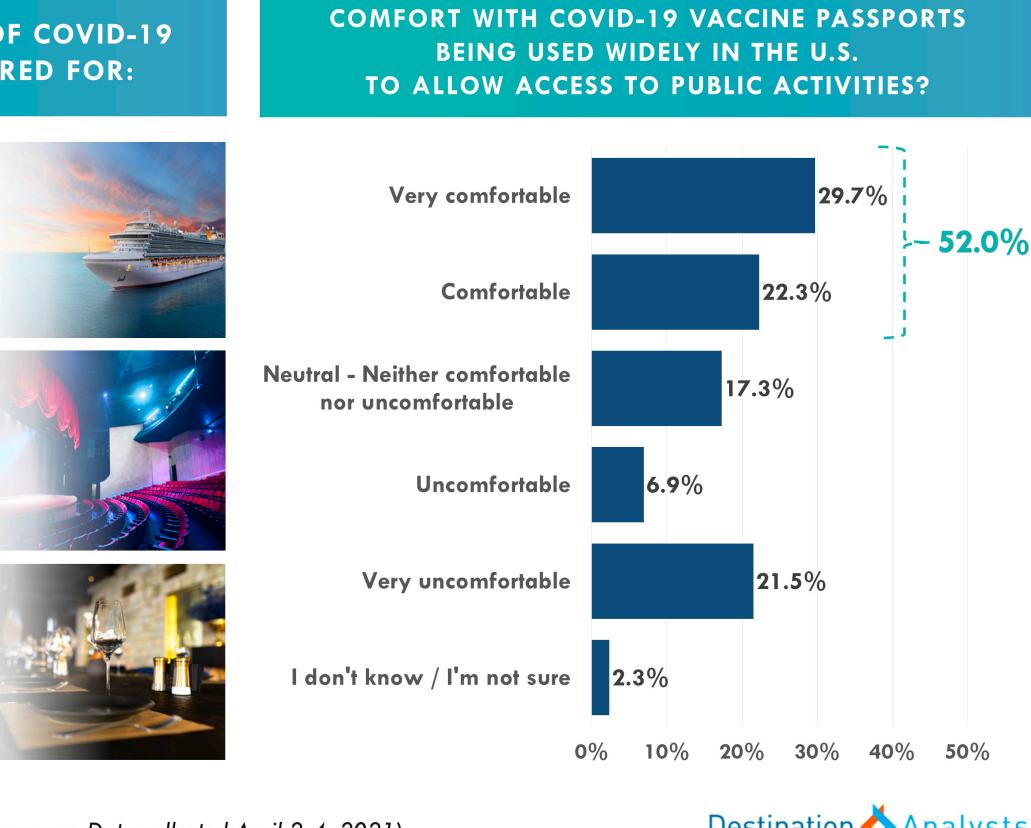
65.3% Boarding a Cruise



59.8% Boarding a Commercial Flight



46.6% Attending Indoor Performances



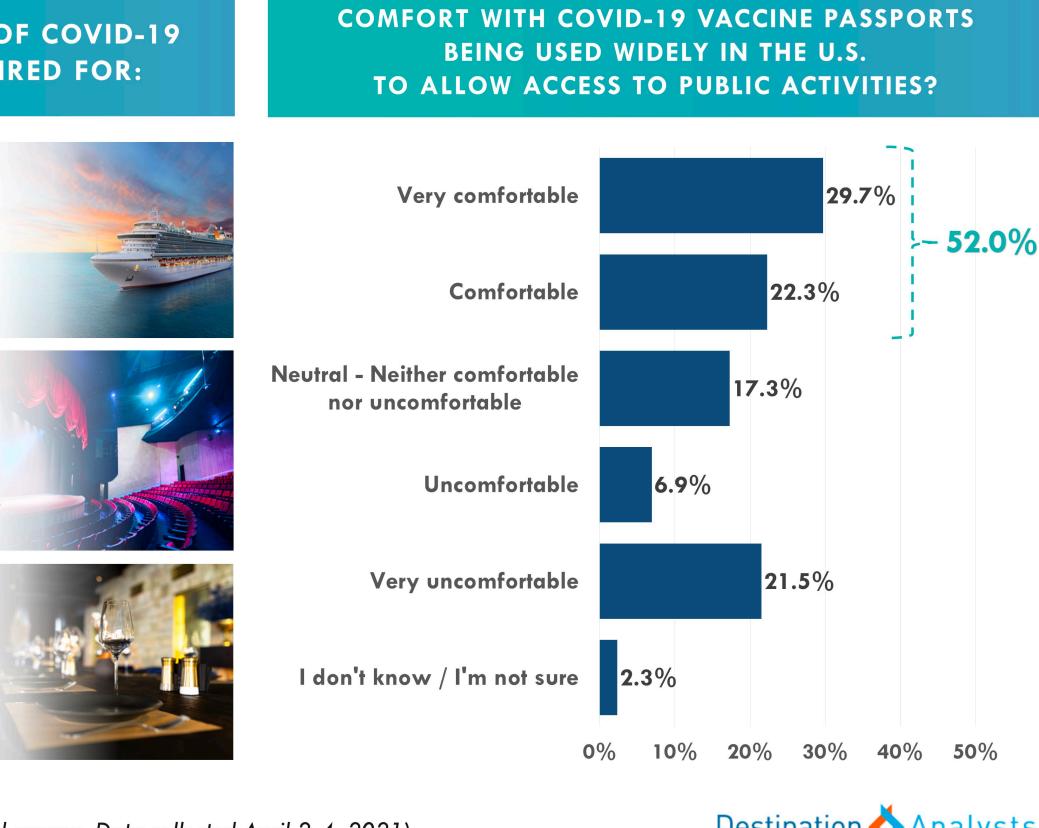
43.3% Attending

Sporting Events

Large-Scale Outdoor,



29.1% Dining Inside a Restaurant



(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)

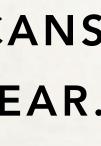


ACCORDING TO THE LATEST LONGWOODS INTERNATIONAL TRACKING STUDY, 88% OF AMERICANS NOW HAVE TRAVEL PLANS IN THE NEXT SIX MONTHS, THE HIGHEST LEVEL IN MORE THAN A YEAR.



Travel Sentiment Study Wave 34

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JULY CONTINUES TO STRENGTHEN AS A PEAK MONTH FOR TRAVEL, AS NOW ONE-THIRD OF AMERICAN TRAVELERS REPORT AT LEAST TENTATIVE TRIP PLANS FOR THAT MONTH.

WHEN AMERICANS EXPECT TO TAKE LEISURE TRIPS AS OF APRIL 4, 2021



QUESTIONS: EVEN IF ONLY TENTATIVELY SCHEDULED, IN WHICH MONTHS DO YOU CURRENTLY PLAN TO TAKE ANY LEISURE TRIPS? (SELECT ALL THAT APPLY)

(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)





NEARLY 54% SAY THEY ARE COMFORTABLE GOING OUT FOR LEISURE ACTIVITIES WHERE THEY LIVE—A PANDEMIC-ERA RECORD-HIGH.

LOCAL RESIDENT SENTIMENT TOWARDS TRAVEL **IS AT A PANDEMIC-PERIOD HIGH AS OF APRIL 4, 2021**



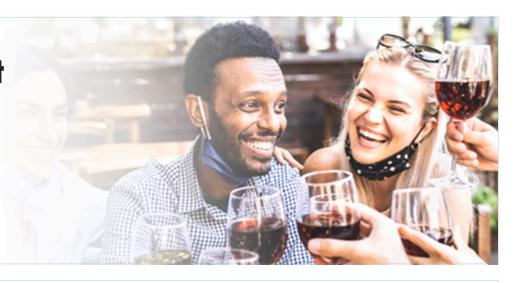
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Are comfortable going out for leisure activities in their own community, up from 22% in April 2020



their community just yet, down from 67% in April 2020

(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)



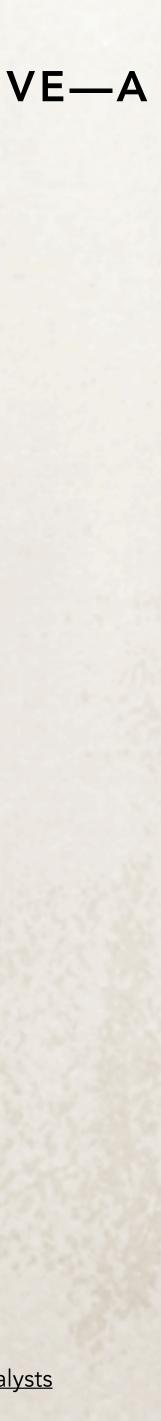
Would be happy to see an ad promoting tourism to their own community, up from 33% in May 2020



Don't want tourists in







TRAVEL NEWS

Fully vaccinated against COVID-19? CDC says it's safe to travel but still recommends staying home

Dawn Gilbertson USA TODAY

Published 11:16 a.m. ET Apr. 2, 2021 Updated 12:27 p.m. ET Apr. 3, 2021

TRAVEL NEWS

Hawaii details plans for COVID-19 vaccine 'passport' for travelers

Associated Press

Published 7:46 a.m. ET Apr. 12, 2021 Updated 3:28 p.m. ET Apr. 12, 2021

American Road Trips Surpass 2019 Levels as Latest Indicator of Travel Recovery

Lebawit Lily Girma, Skift- Apr 07, 2021 5:15 pm

SKIFT TAKE



mericans are hitting the road in big numbers again - another sign that the nation is on the road to domestic tourism recovery. It's a timely boost as international visitors are unlikely to return by the summer.

- Lebawit Lily Girma

TRAVEL NEWS HEADLINES

AIRLINES

Airline, travel stocks slip after U.S. recommends pause in J&J Covid vaccine

PUBLISHED TUE, APR 13 2021-9:23 AM EDT | UPDATED TUE, APR 13 2021-11:08 AM EDT



Leslie Josephs @LESLIEJOSEPHS

Travel's Labor Problem Now as Surge in **Demand Leaves Operators Scrambling**

Cameron Sperance, Skift- Apr 13, 2021 2:30 am



travel labor shortage isn't what anyone was expecting during a pandemic, but traveler confidence heading into the summer heavily outpaces the ability of many business owners to call back furloughed workers or hire more people from overseas.

- Cameron Sperance

in 🖂



KEY TAKEAWAYS

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As of this week, over 27% of the U.S. adult population is vaccinated against COVID-19 and the proportion of Americans highly concerned about their family or friends contracting the virus is now at an all-time low. The fear about travel has also continued to decline.

More than two-thirds have
a "ready-to-travel" state-
of-mind and this readiness
has resulted in a lot of
travel plans. Travelers are
making reservations closer
to their travel dates.Tennessee continues to be
a top domestic destination
that Americans want to visit
that Americans.

3

4

The safety perception of travel activities continues to improve. Travelers are less likely to visit an attraction or business that does not have clear safety protocols like mask wearing and social distancing in place.