

The SOUNDTRACK of AMERICA
MADE IN
TENNESSEE®



TENNESSEE COVID-19 RESEARCH & INSIGHTS

5.18.2020



TRAVEL RESEARCH PARTNERS

IMPACT & FORECASTING



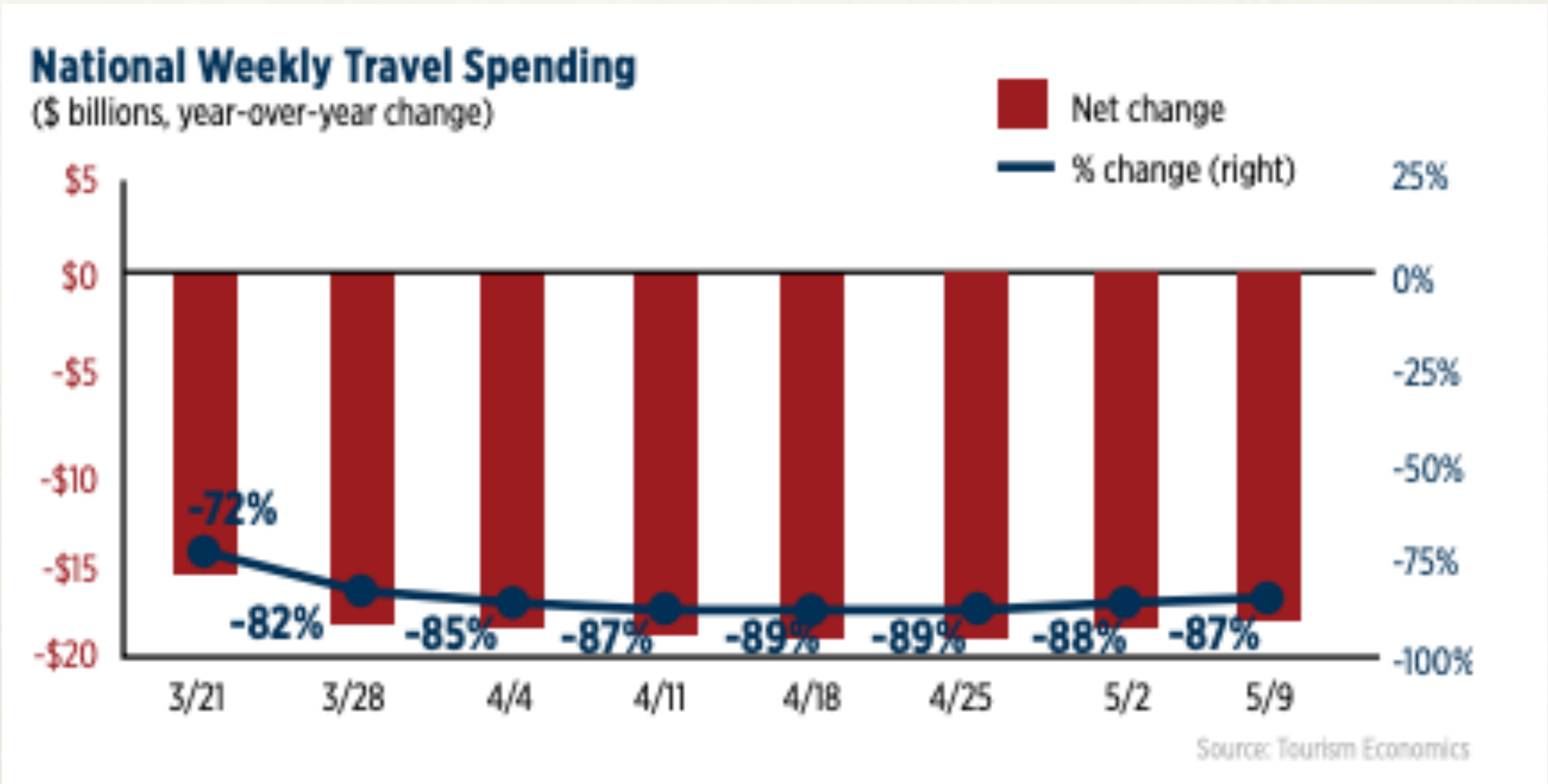
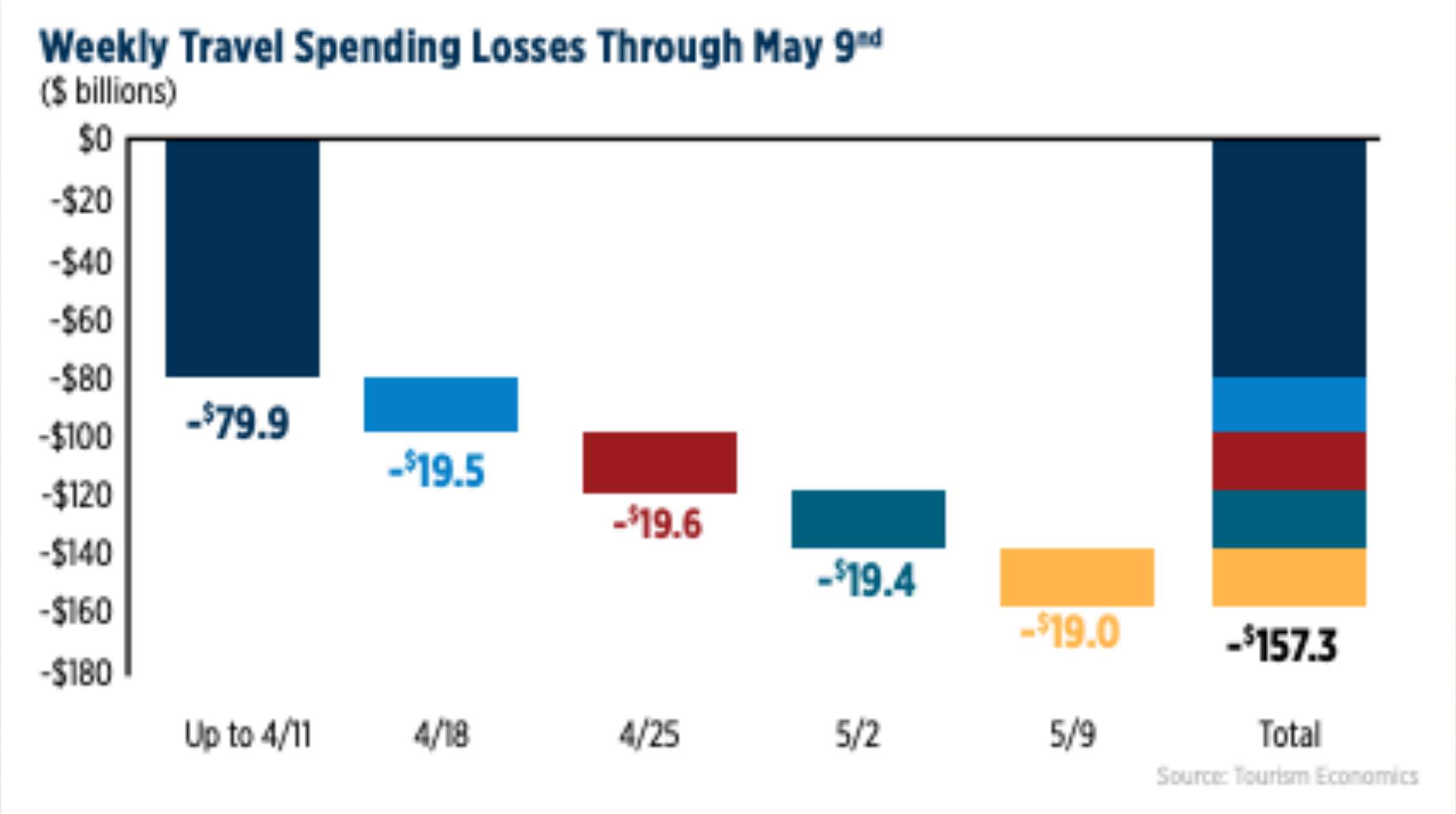
SENTIMENT



CONSUMER BEHAVIOR

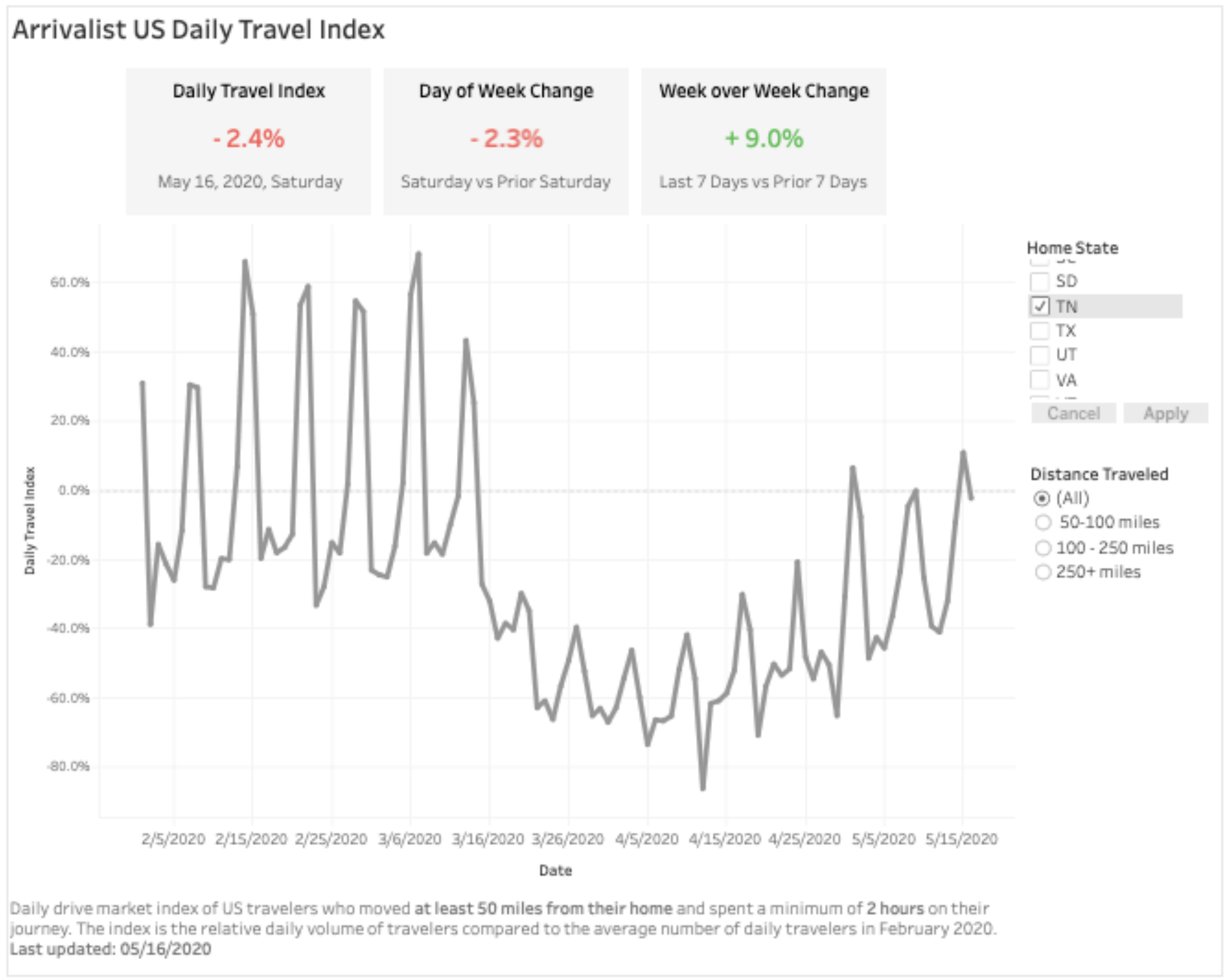


WEEKLY TRAVEL SPENDING - U.S. & TENNESSEE

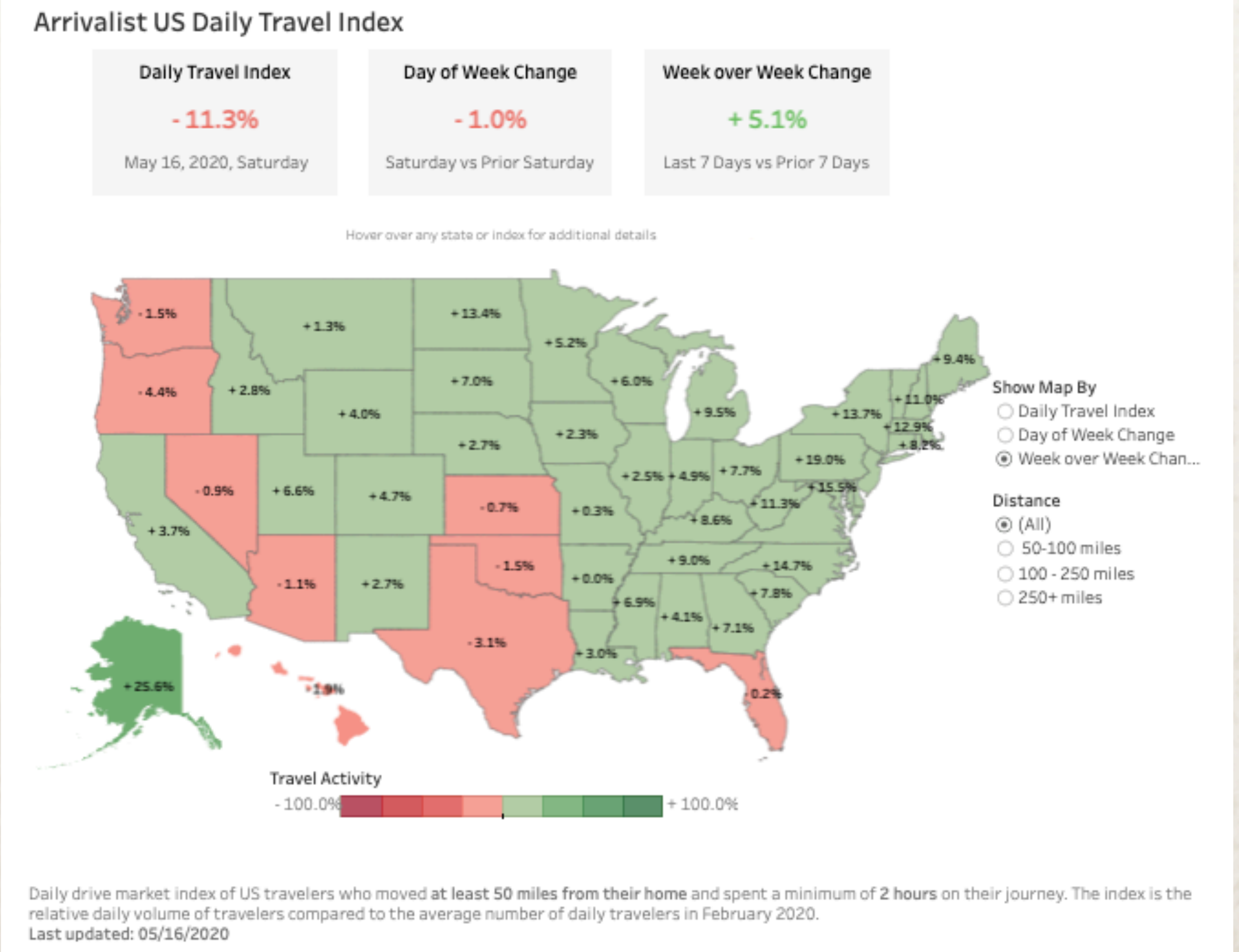


Tennessee														
Week Ending	8-Feb	15-Feb	22-Feb	29-Feb	7-Mar	14-Mar	21-Mar	29-Mar	4-Apr	11-Apr	18-Apr	25-Apr	2-May	9-May
Spending (\$ Millions)	414	425	426	422	433	346	143	76	66	57	56	51	57	68
Pecent Change over 2019	0%	3%	3%	2%	-1%	-21%	-67%	-83%	-85%	-87%	-87%	-89%	-87%	-85%

TENNESSEE ARRIVALS UP WEEK OVER WEEK (5/10-5/16)



Tennessee



U.S.

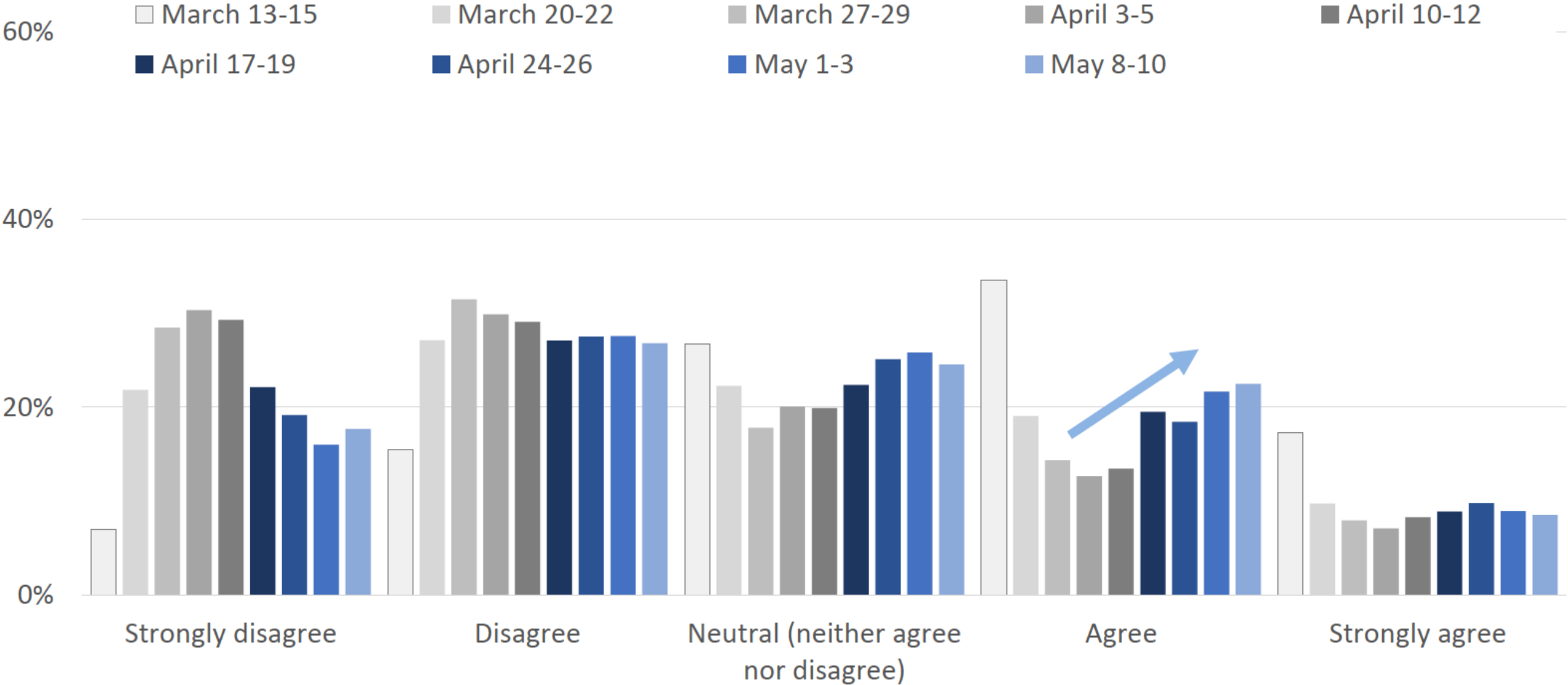
RESIDENTS ARE STARTING TO FEEL MORE COMFORTABLE GOING OUT IN THEIR OWN COMMUNITIES

Comfort Enjoying Home Community

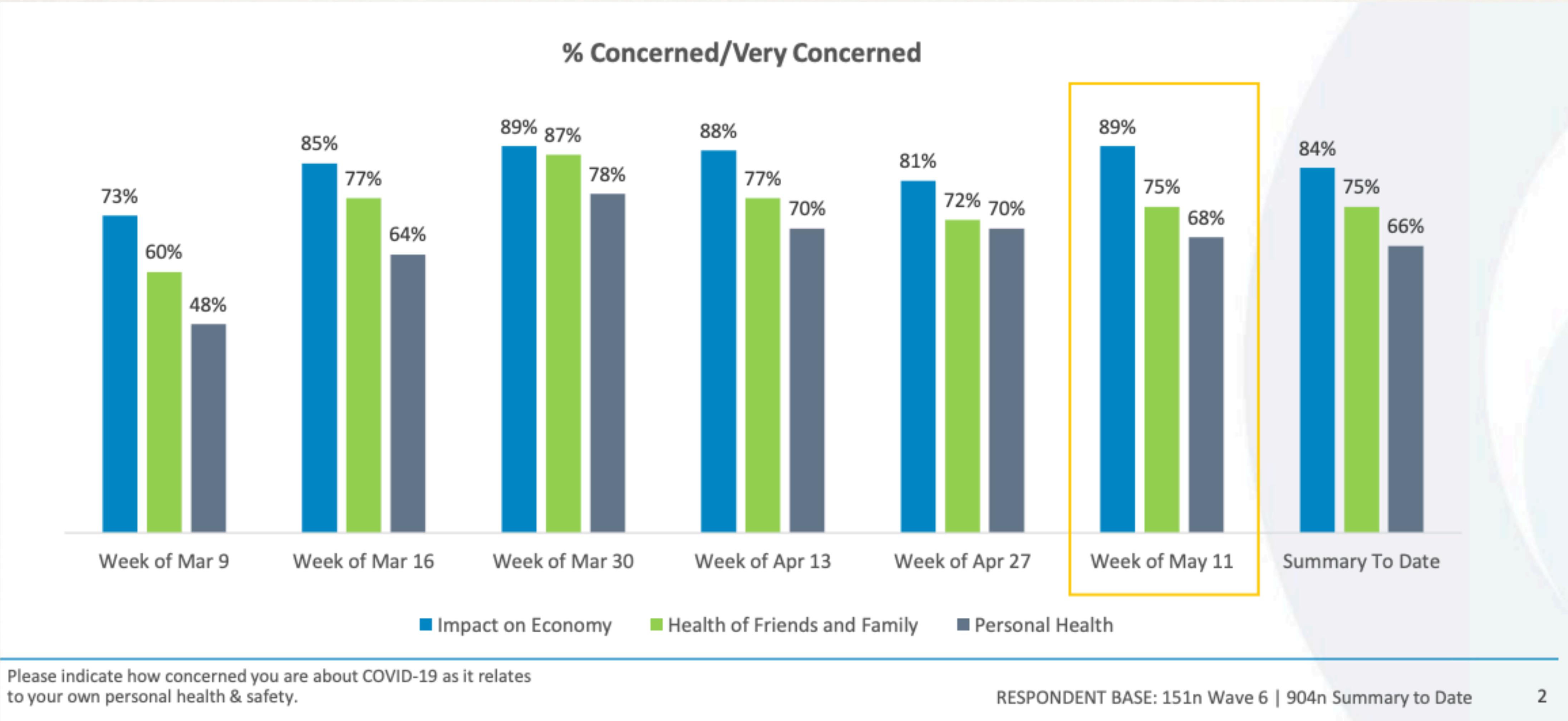
How much do you agree with the following statement?

Statement: I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



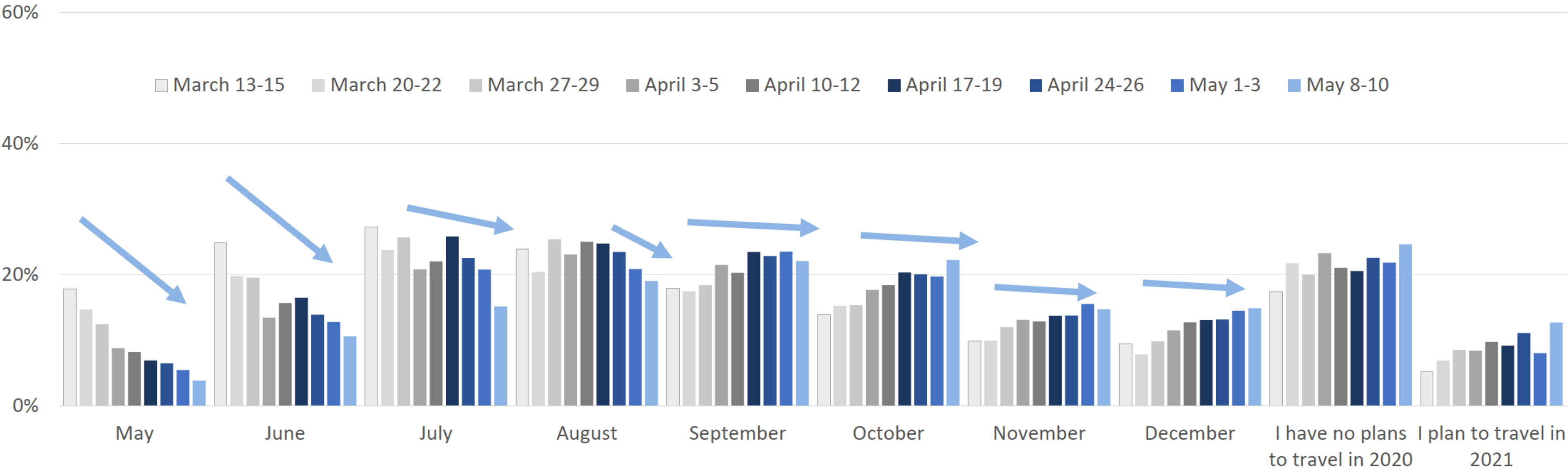
NEARLY NINE OUT OF TEN TRAVELERS ARE CONCERNED ABOUT ECONOMIC CONDITIONS,
MATCHING THE PREVIOUS HIGH RECORDED IN EARLY APRIL



VACATION PLANS CONTINUE TO CHANGE MAKING IT CHALLENGING TO PREDICT TRAVEL VOLUME OVER THE NEXT MONTHS

Months of Upcoming Trips

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3 and 8-10, 2020)

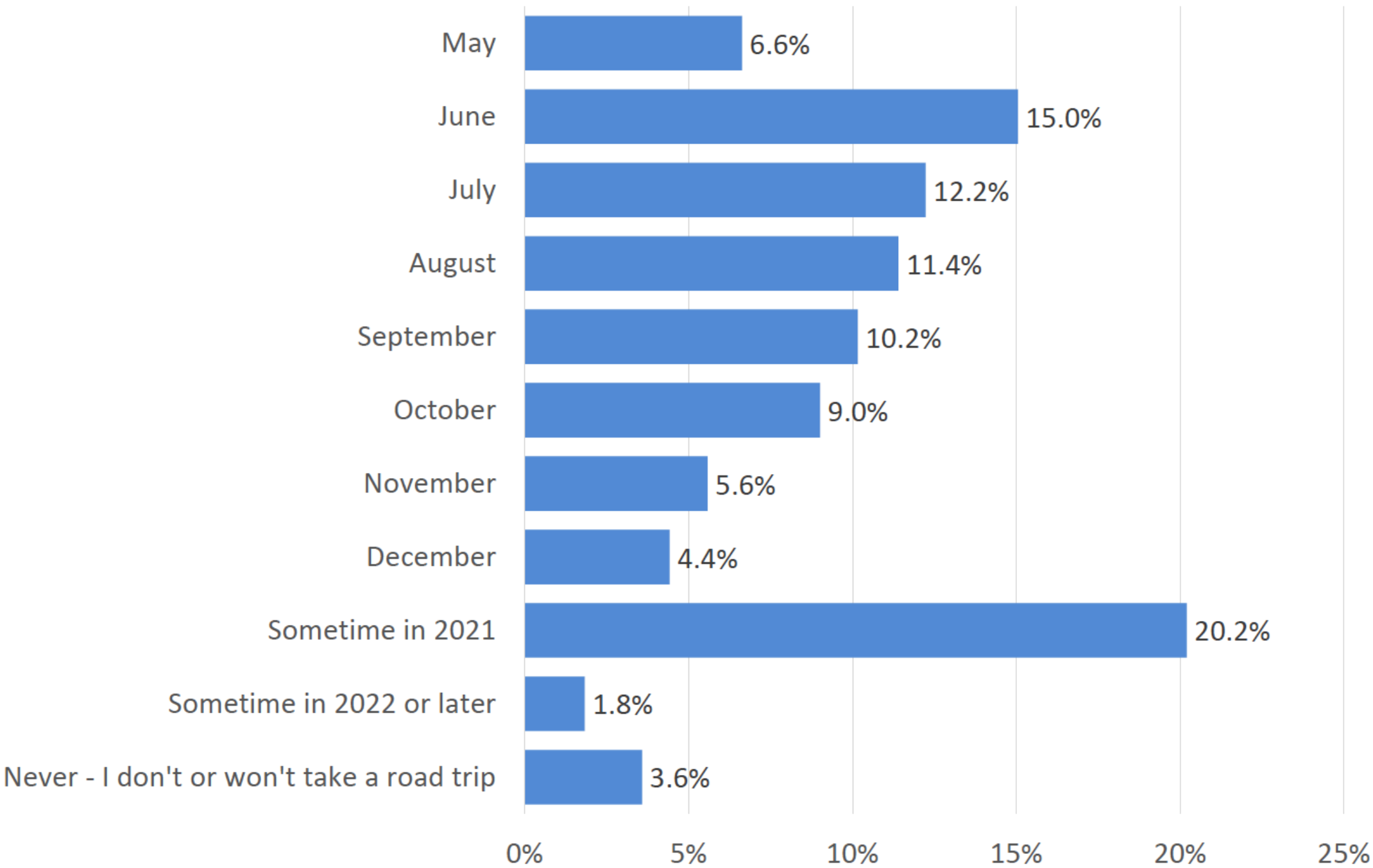
TRAVELERS CONTINUE TO BE MORE COMFORTABLE TAKING ROAD TRIPS AND INDICATE THEIR NEXT/FIRST ROAD TRIP LIKELY TO BE UNDER 500 MILES

Month of Next Road Trip

Question: In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

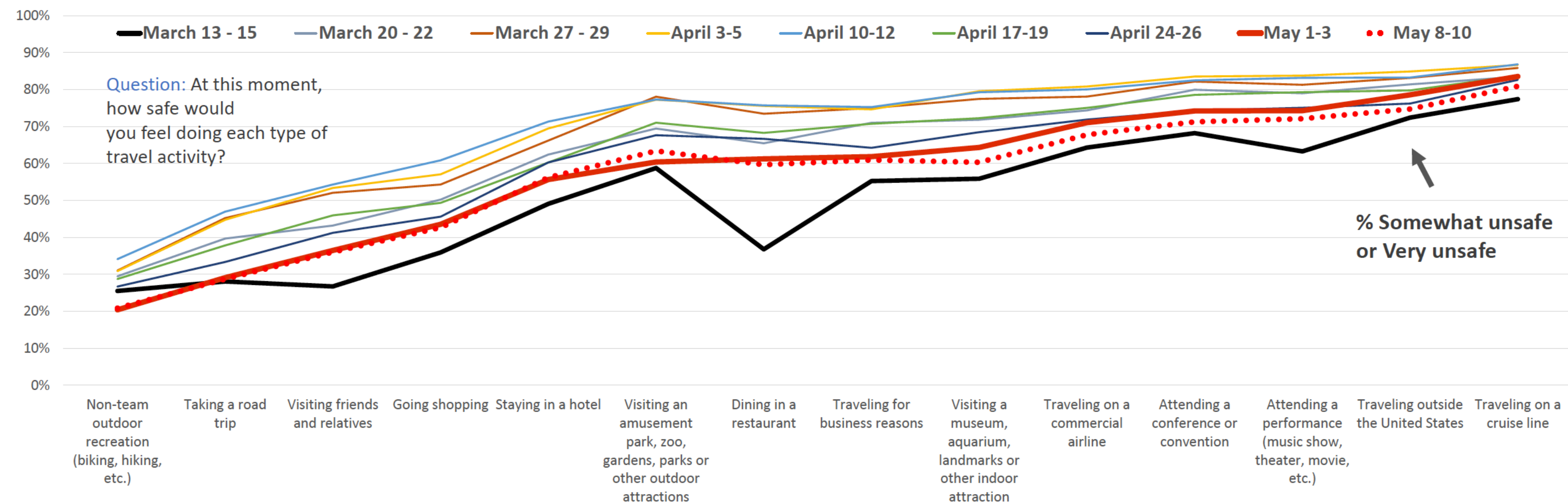
(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



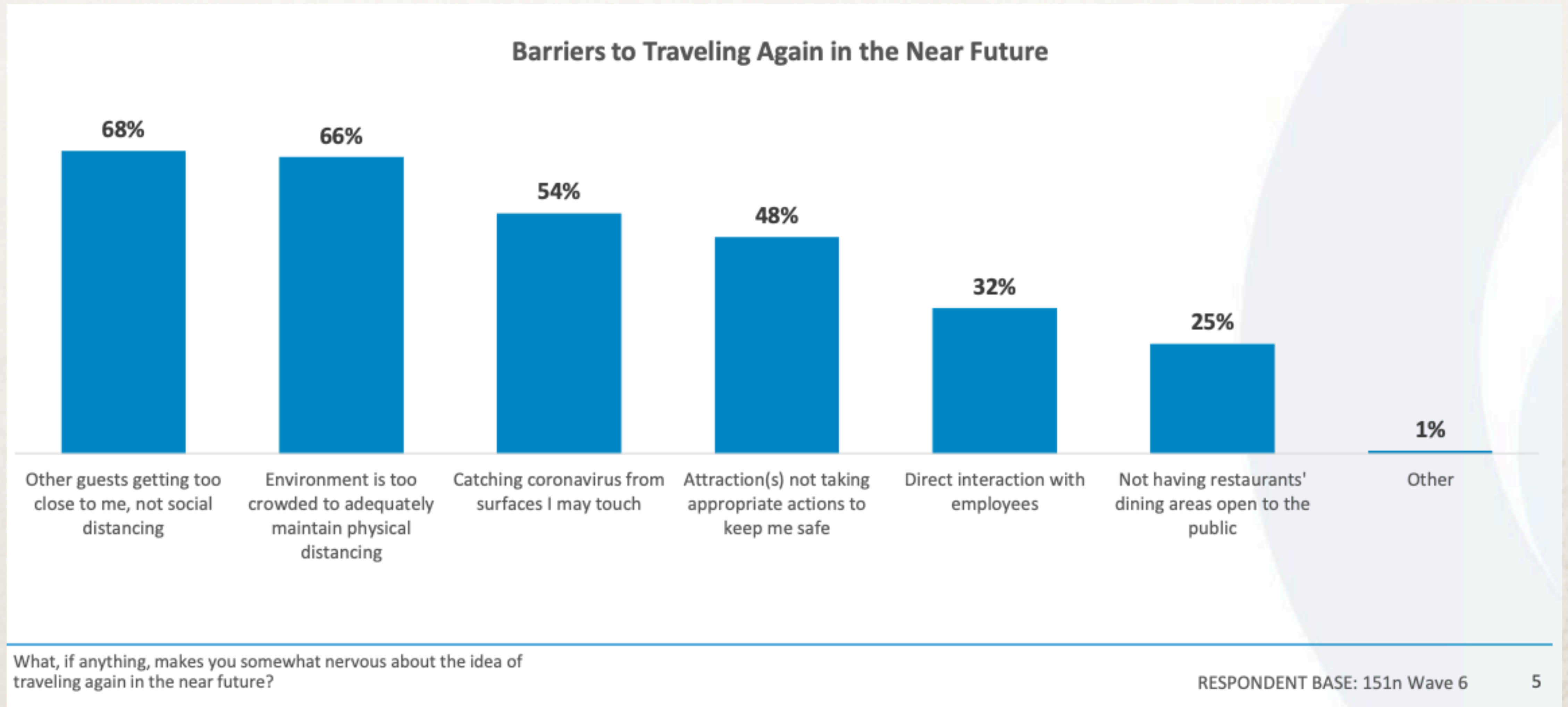
SAFETY CONTINUES TO BE TRAVELERS' PRIMARY CONCERN, BUT SAFETY PERCEPTIONS CONTINUE TO IMPROVE FROM LOWS IN APRIL

Perceived Safety of Travel Activities (Waves 1-9 Comparison)



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 27--29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

THE BIGGEST BARRIERS PREVENTING TRAVELERS FROM VISITING DESTINATIONS AND ATTRACTIONS CONTINUE TO BE LACK OF SOCIAL DISTANCING AND CROWDED PLACES



TRAVELERS WANT TO KNOW WHAT DESTINATIONS AND ATTRACTIONS ARE DOING TO KEEP VISITORS SAFE AND THINK THAT MOST SAFETY MEASURES ARE A GOOD IDEA



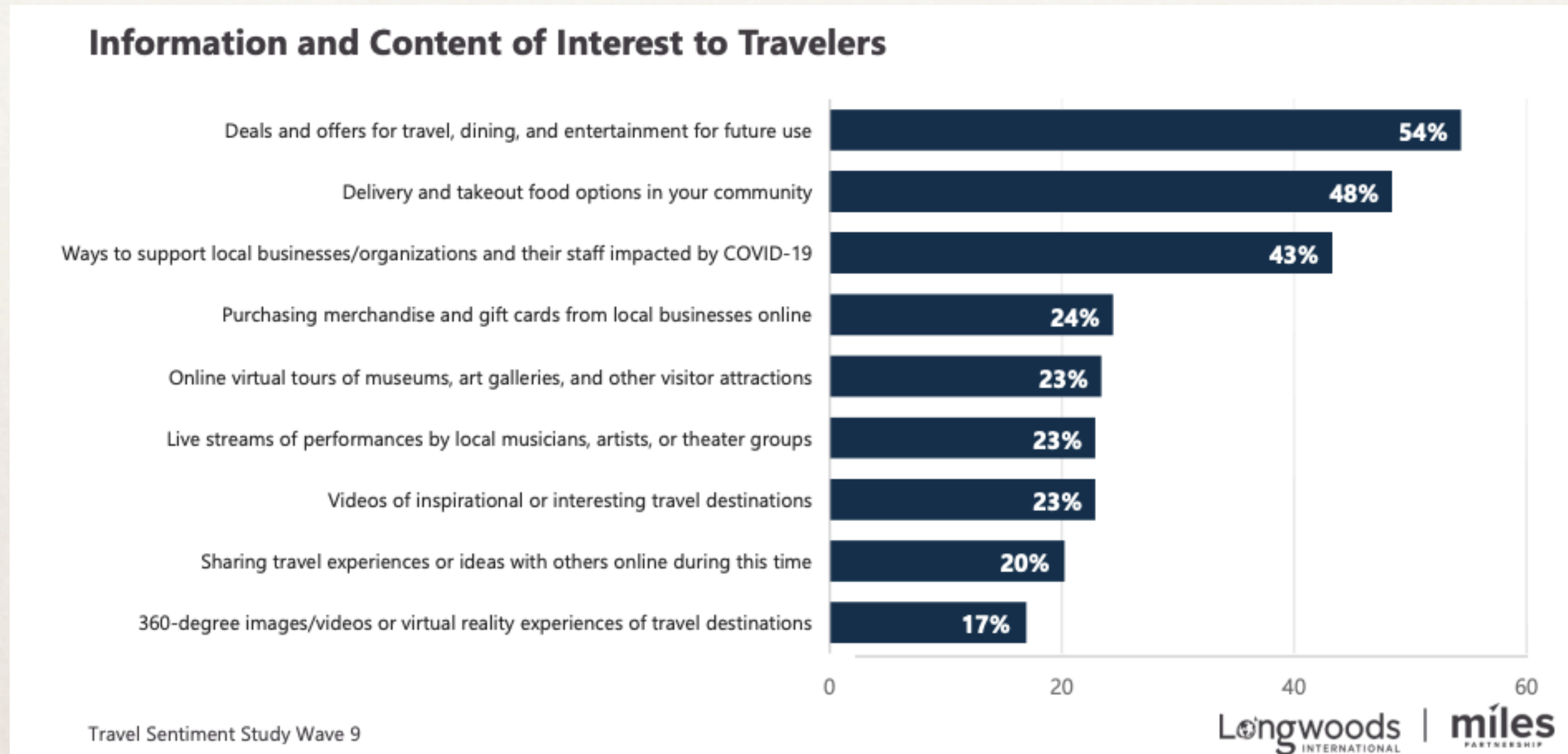
THE MAJORITY ARE RECEPTIVE TO TRAVEL INFORMATION AND WANT TO BE COMMUNICATED TO
IN AN HONEST AND FRIENDLY TONE



A word cloud illustrating the preferences for travel communication. The words are arranged in a central cluster, with 'HONEST' and 'FRIENDLY' being the most prominent. Other words include 'HUMBLE', 'SERIOUS', 'AUTHORITATIVE', 'INTIMATE', 'DIRECT/NO_NONSENSE', 'FUN/ENTERTAINING', and 'INSPIRATIONAL'. The words are in various colors (blue, orange, purple, brown) and sizes, creating a dynamic visual effect.

AUTHORITATIVE
HUMBLE
FRIENDLY
SERIOUS
HONEST
INTIMATE
DIRECT/NO_NONSENSE
FUN/ENTERTAINING
INSPIRATIONAL

TRAVELERS ARE INTERESTED IN DEALS, FUTURE TRAVEL OFFERS, FOOD OPTIONS, AND WAYS TO SUPPORT LOCAL BUSINESSES/ORGANIZATIONS



KEY TAKEAWAYS

1

Drive market trends for the U.S. and Tennessee continue to move upward; however, volume remains low

2

Americans are still cautious about traveling and upcoming travel plans continue to change

3

Travelers want to know what destinations and attractions are doing to keep them safe and mostly agree with proposed safety measures

4

Travelers are receptive to advertising and want to be communicated to in an honest and friendly tone