

The SOUNDTRACK of AMERICA
• MADE IN •

TENNESSEE®



TENNESSEE COVID-19 RESEARCH & INSIGHTS

6.1.2020



TRAVEL RESEARCH PARTNERS

IMPACT & FORECASTING



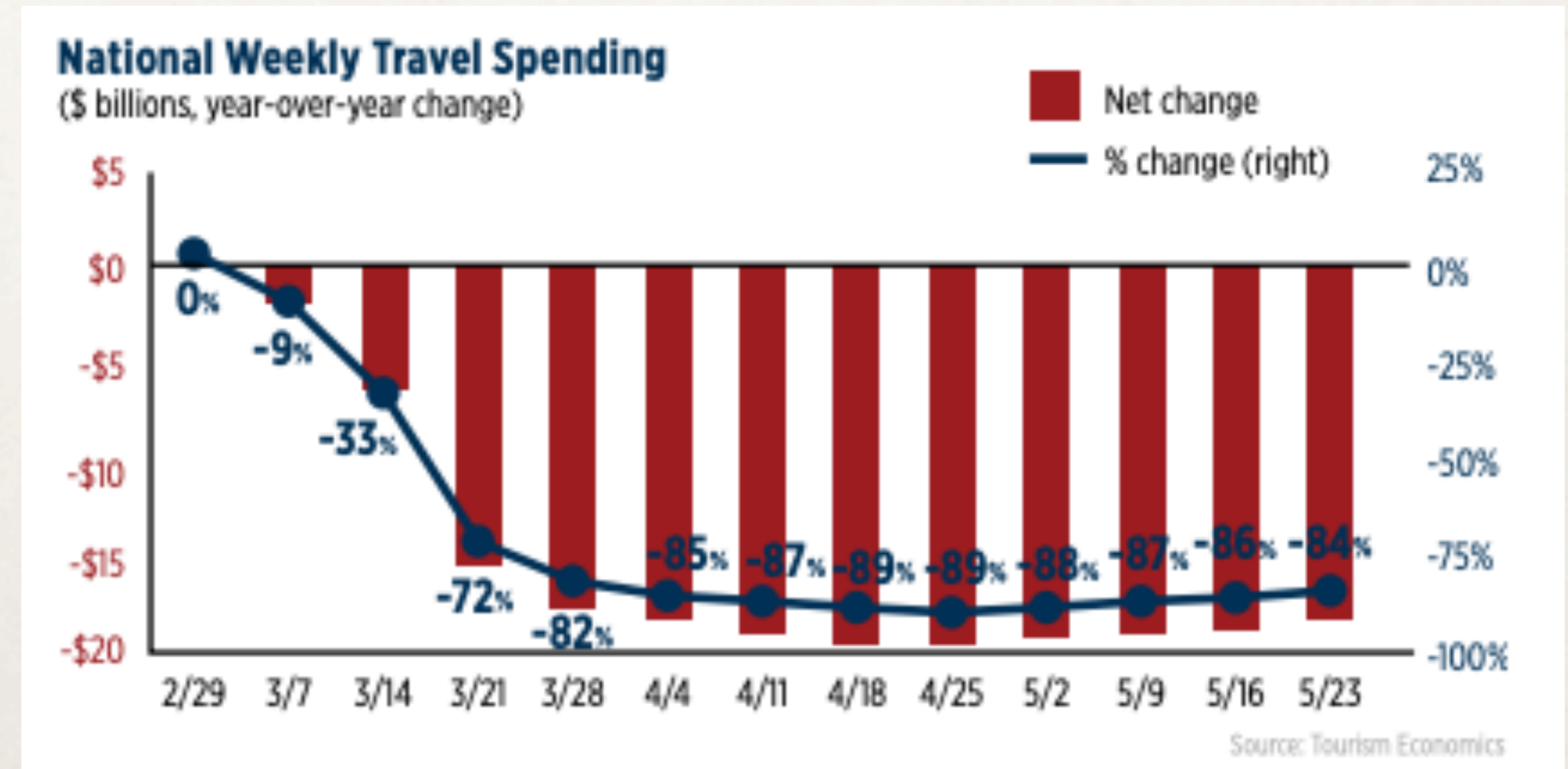
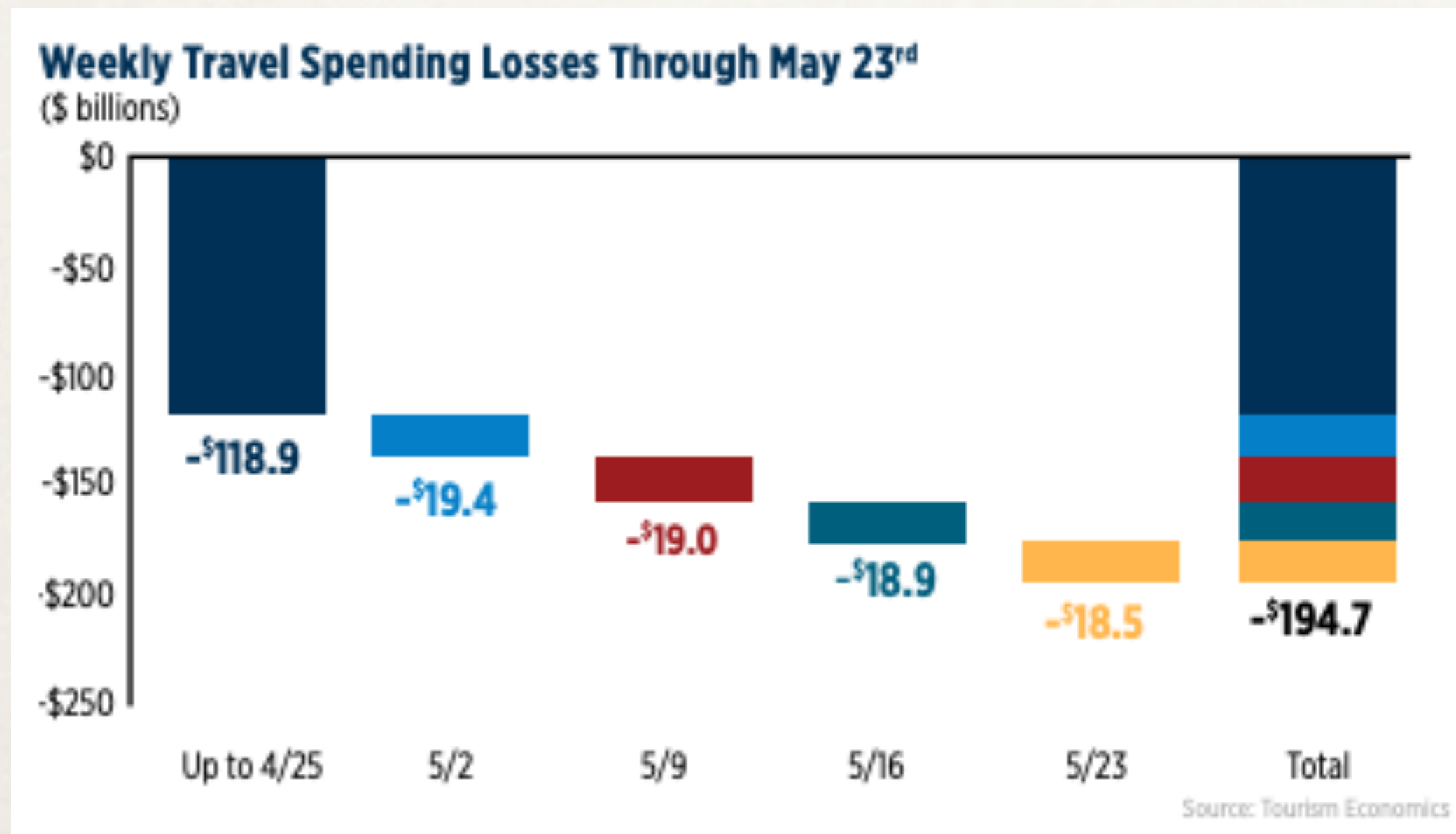
SENTIMENT



CONSUMER BEHAVIOR



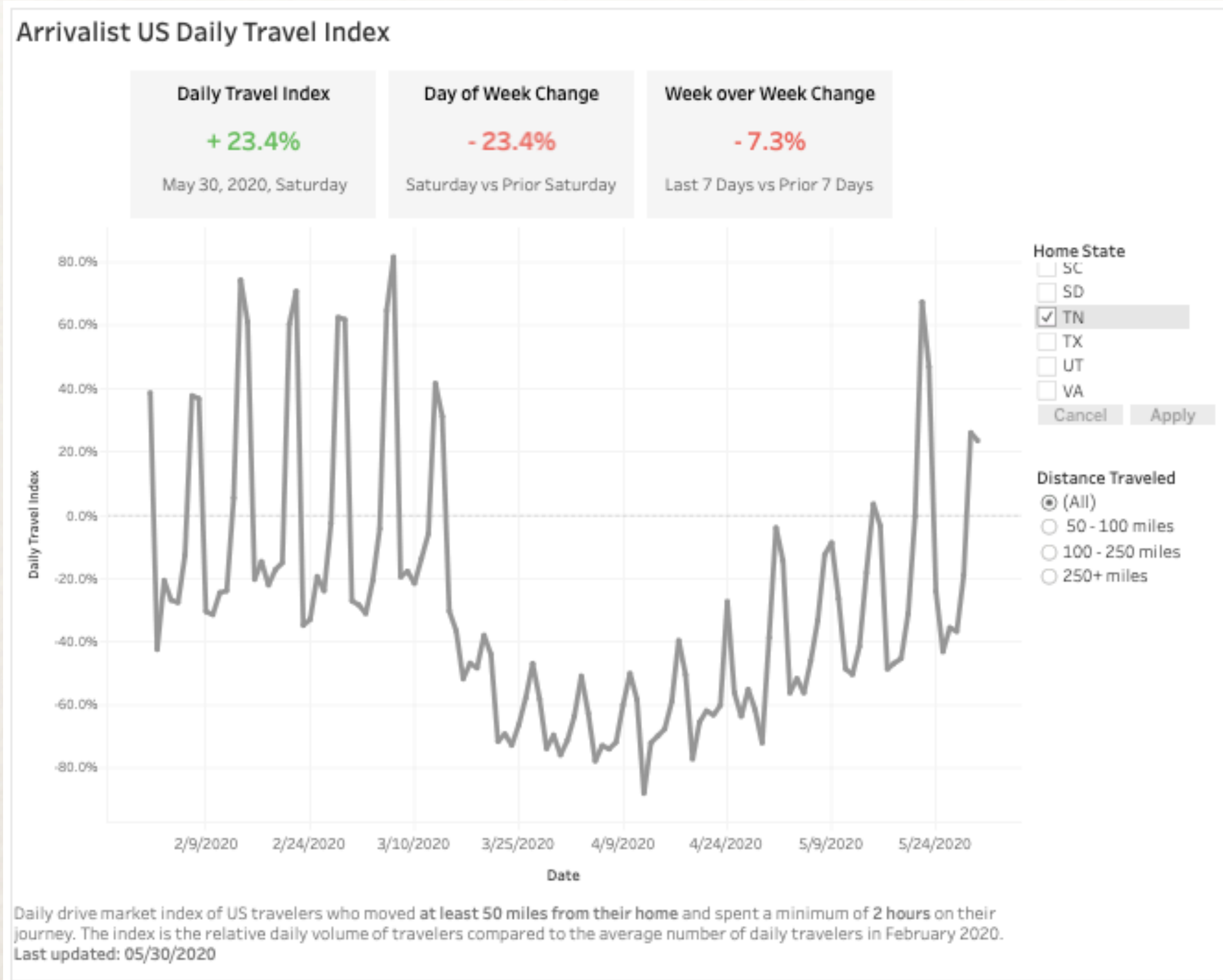
WEEKLY TRAVEL SPENDING - U.S. & TENNESSEE



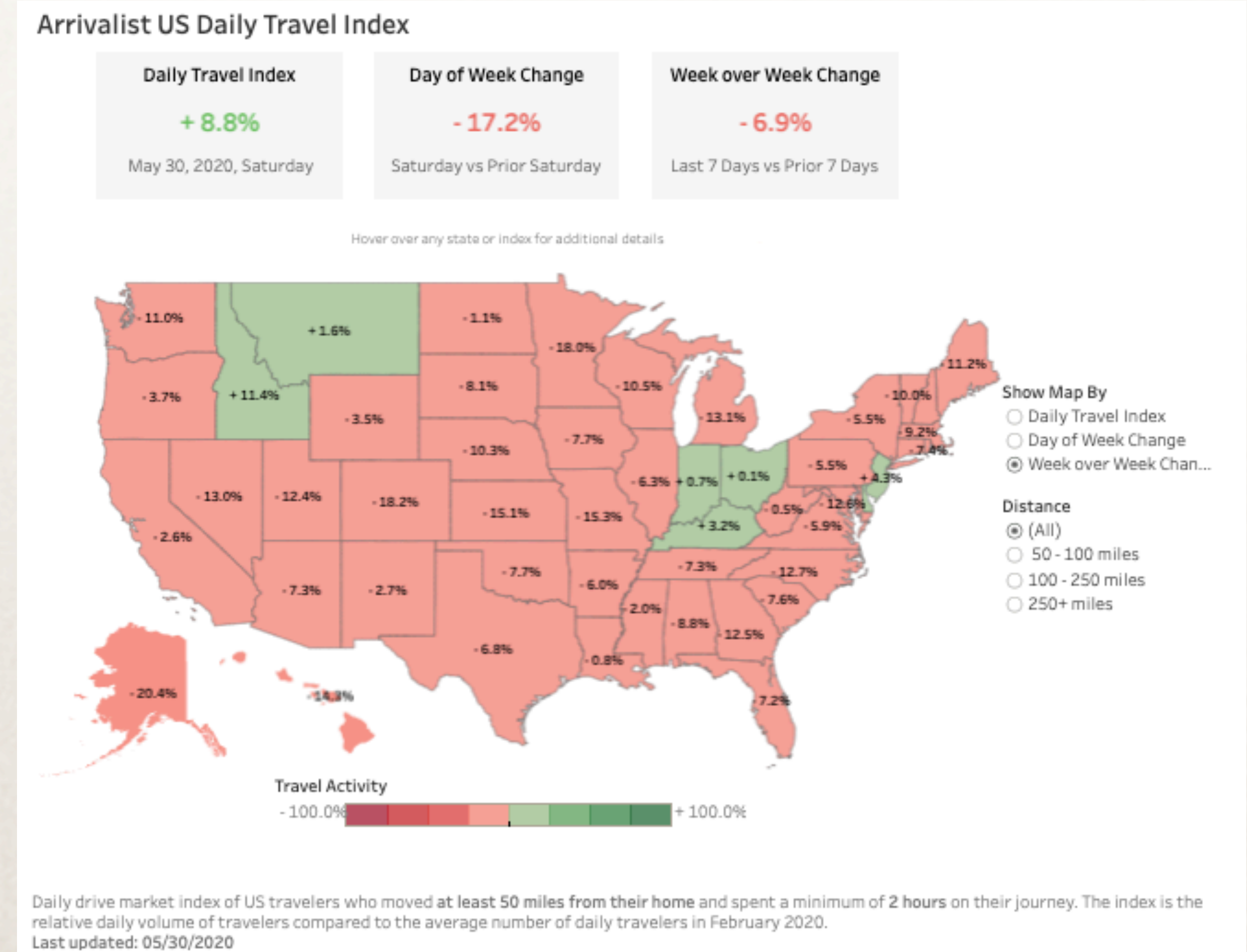
Tennessee

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	16-May	23-May
Spending (\$ Millions)	414	425	426	422	433	346	143	76	66	57	56	51	57	68	73	85
Percent Change over 2019	0%	3%	3%	2%	-1%	-21%	-67%	-83%	-85%	-87%	-87%	-89%	-87%	-85%	-84%	-81%

TENNESSEE ARRIVALS DOWN FROM THE HOLIDAY WEEKEND (5/24-5/30). THE MEMORIAL DAY WEEKEND LED TO THE BIGGEST INCREASE IN TRAVEL WEEKEND-OVER-WEEKEND.



Tennessee

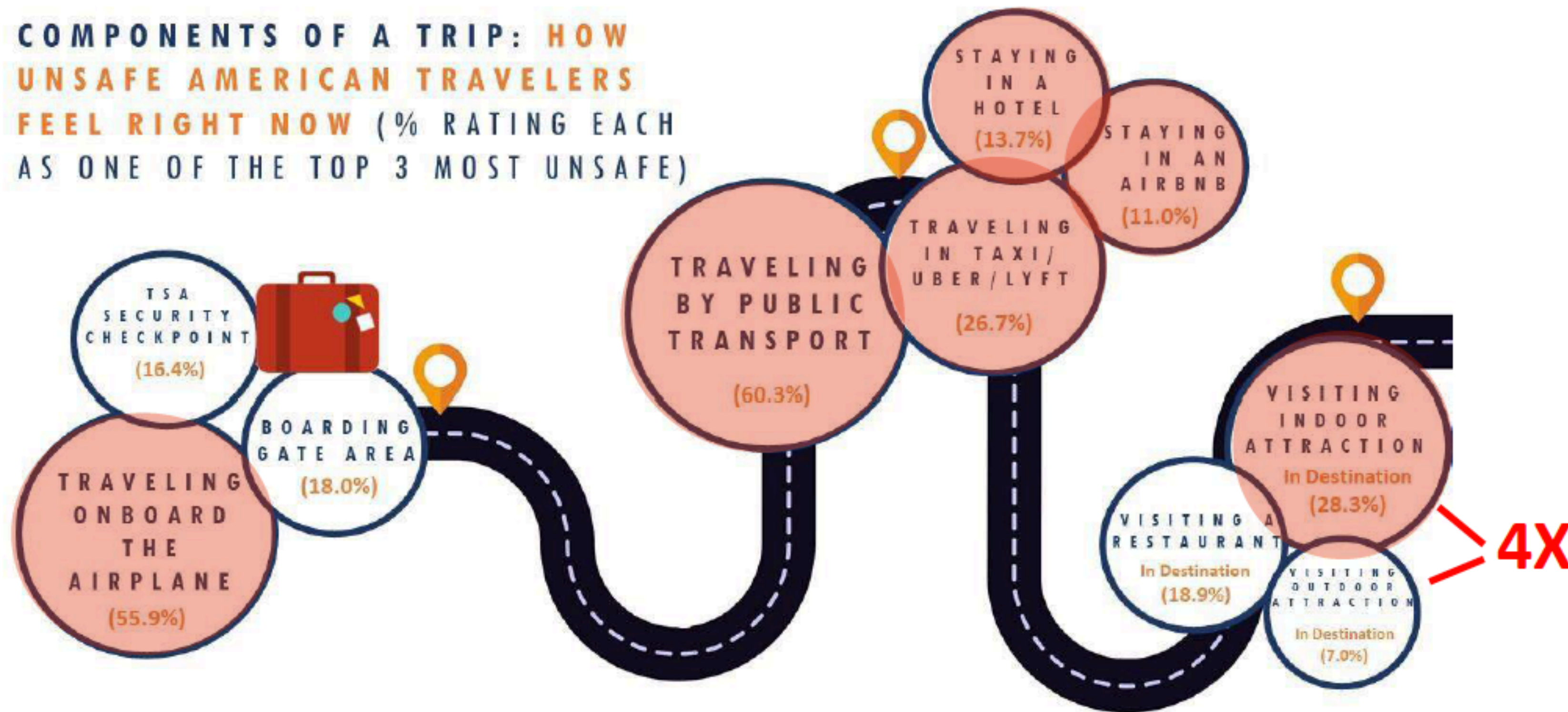


U.S.

TRAVELERS FEEL UNSAFE DURING TRANSPORTATION AND IN ENCLOSED SPACES

Safety Along the Travel Path

COMPONENTS OF A TRIP: HOW UNSAFE AMERICAN TRAVELERS FEEL RIGHT NOW (% RATING EACH AS ONE OF THE TOP 3 MOST UNSAFE)



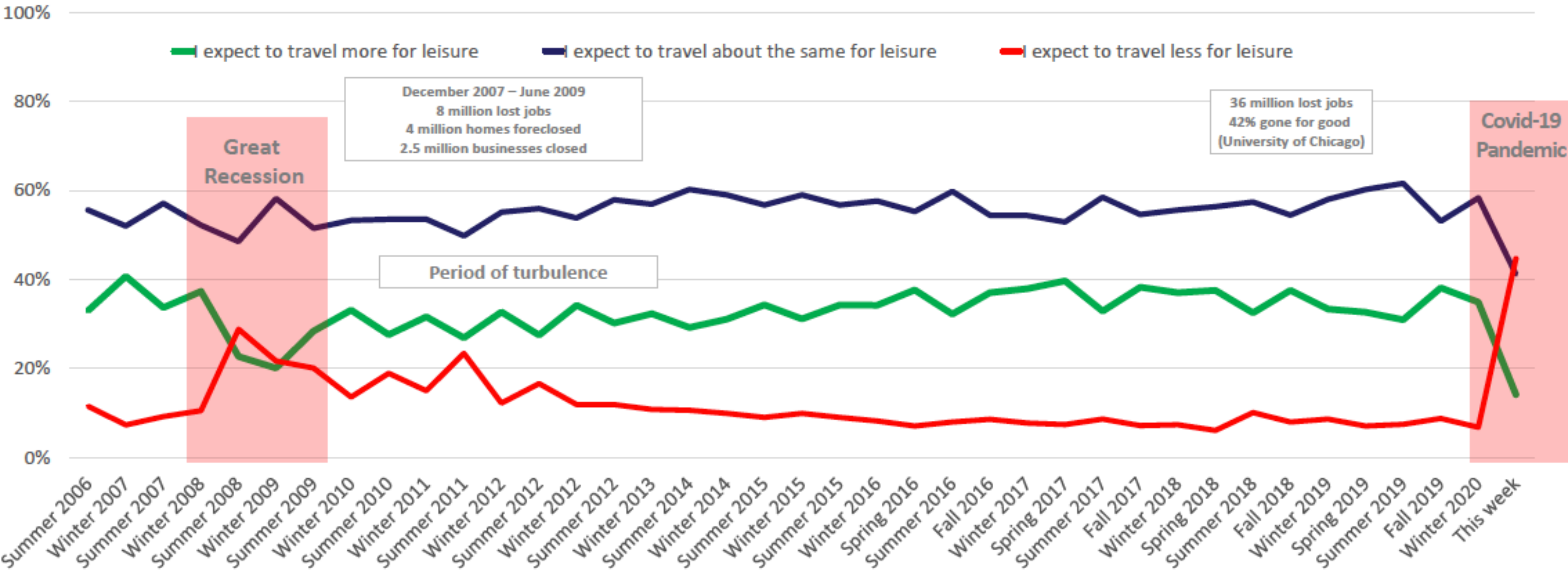
Question: Thinking about the coronavirus situation, which of these would you consider to be the most UNSAFE travel activities? Select up to 3

Destination Analysts

THE CURRENT DECLINE IN TRAVEL SENTIMENT AND EXPECTATIONS IS FAR WORSE THAN AFTER THE GREAT RECESSION

Historical Perspective: Leisure Travel Expectations (Trips Taken)

Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?



(Base: All respondents, 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

AMERICANS ARE EXHIBITING DEPRESSED LEVELS OF EXCITEMENT AND INTEREST DUE TO CORONAVIRUS

Excitement for Each Destination Type (Top 3-Box Score)

Question: On the last page you said you would like to visit <<DESTINATION NAME>> in the next year.

Which of the following are reasons you want to visit <<DESTINATION NAME>> this year?

	January 2020	This Week	% CHNG
Beaches or water sports	19.5%	22.7%	16.4%
Friends or family are there	28.0%	30.4%	8.5%
Connecting with nature	20.4%	18.2%	-10.6%
Shopping	15.8%	13.7%	-12.8%
Music scene	8.8%	7.3%	-16.8%
Theme or amusement park	12.9%	9.7%	-25.1%
Adventure	22.0%	16.0%	-27.2%
It's mysterious or exotic	7.8%	5.5%	-29.2%
Special event, sporting event or festival	12.8%	8.8%	-31.2%
Winter fun (skiing, snowboarding etc.)	4.9%	3.3%	-31.8%
Bucket list destination	14.7%	9.7%	-34.2%
History	19.4%	12.7%	-34.3%
Visited before and want to return	40.1%	25.7%	-35.8%
Food & cuisine	32.3%	20.5%	-36.4%
Arts & culture	17.3%	10.3%	-40.6%
Nightlife	15.5%	9.2%	-41.0%
General atmosphere	36.6%	21.4%	-41.4%
Word of mouth	8.9%	4.9%	-44.9%
Romance	12.2%	6.7%	-45.0%

← Only two reasons increased between January to this week.

(Base: All respondents, 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

TRAVELERS MOST INTERESTED IN OUTDOOR ACTIVITIES, THE BEACH, SCENIC BEAUTY, AND PARKS

General Interest in Travel Experiences (Top 2-Box Score)

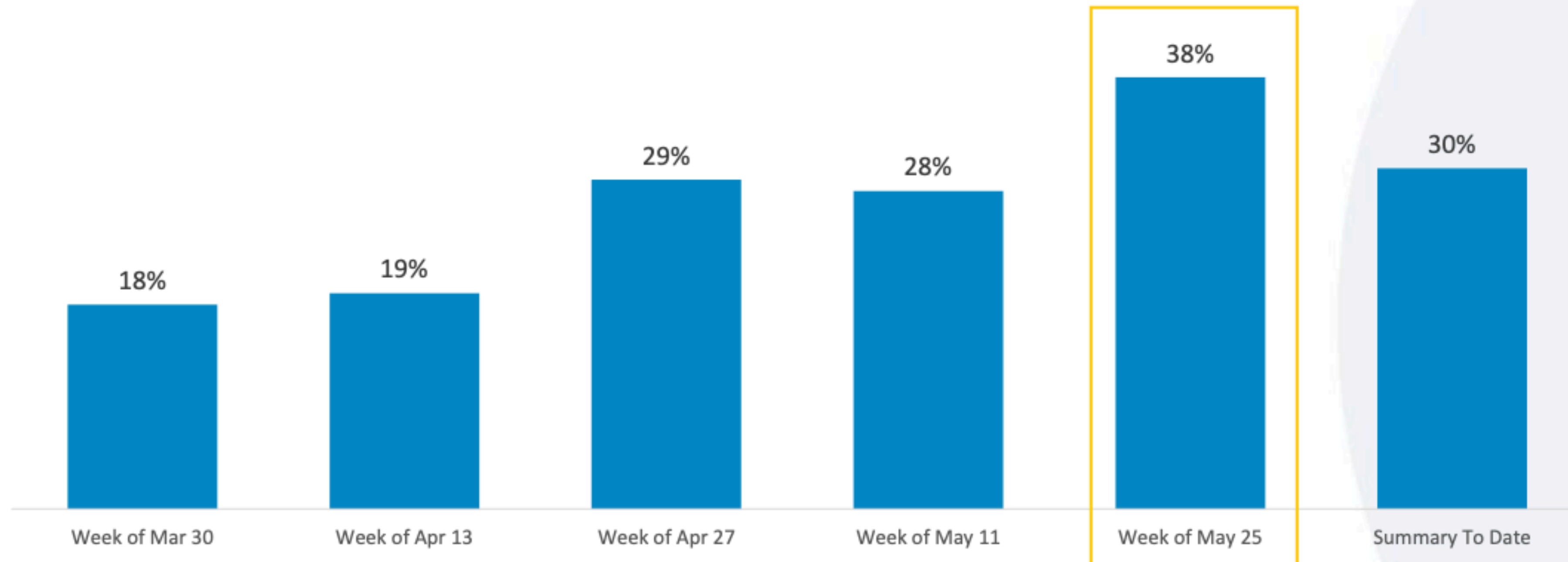
Question: In general how interested are you in taking LEISURE TRIPS which would include the following:

Top 2-Box Score (Interested or Very interested)	January 2020	This Week	% CHNG
Visit State, local or regional parks	48.7%	45.2%	-7.2%
Outdoor activities (winter)	25.1%	23.1%	-8.1%
Take Road Trips	57.4%	50.5%	-12.1%
Small towns, villages or rural destinations/attractions	47.4%	40.6%	-14.4%
Visits to mountain destinations/resorts (including ski resorts)	40.6%	34.1%	-16.0%
Visit U.S. National Parks	57.0%	46.7%	-18.1%
Cuisine and food experiences	58.3%	47.4%	-18.6%
Enjoying scenic beauty	76.1%	61.7%	-19.0%
Theme or amusement parks	38.3%	30.1%	-21.5%
Outdoor activities (warm weather)	68.7%	53.4%	-22.3%
Visits to beach destinations or resorts	66.2%	51.0%	-23.0%
Attend Festivals and Special Events	43.4%	33.2%	-23.5%
Visiting historical attractions	62.2%	46.5%	-25.2%
Arts & culture	47.8%	31.7%	-33.7%
Visits to desert destinations or resorts	36.8%	23.8%	-35.3%
Big city experiences	53.8%	34.3%	-36.3%
Visits to foreign countries	58.0%	30.4%	-47.6%

(Base: All respondents, 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

IMPACTS ON TRAVEL CONTINUE UNABATED, WITH MANY NOW PUTTING OFF TRAVEL FURTHER

When Will You Feel Comfortable Planning a Leisure Trip? - % Selected Next Year (2021 or Thereafter)



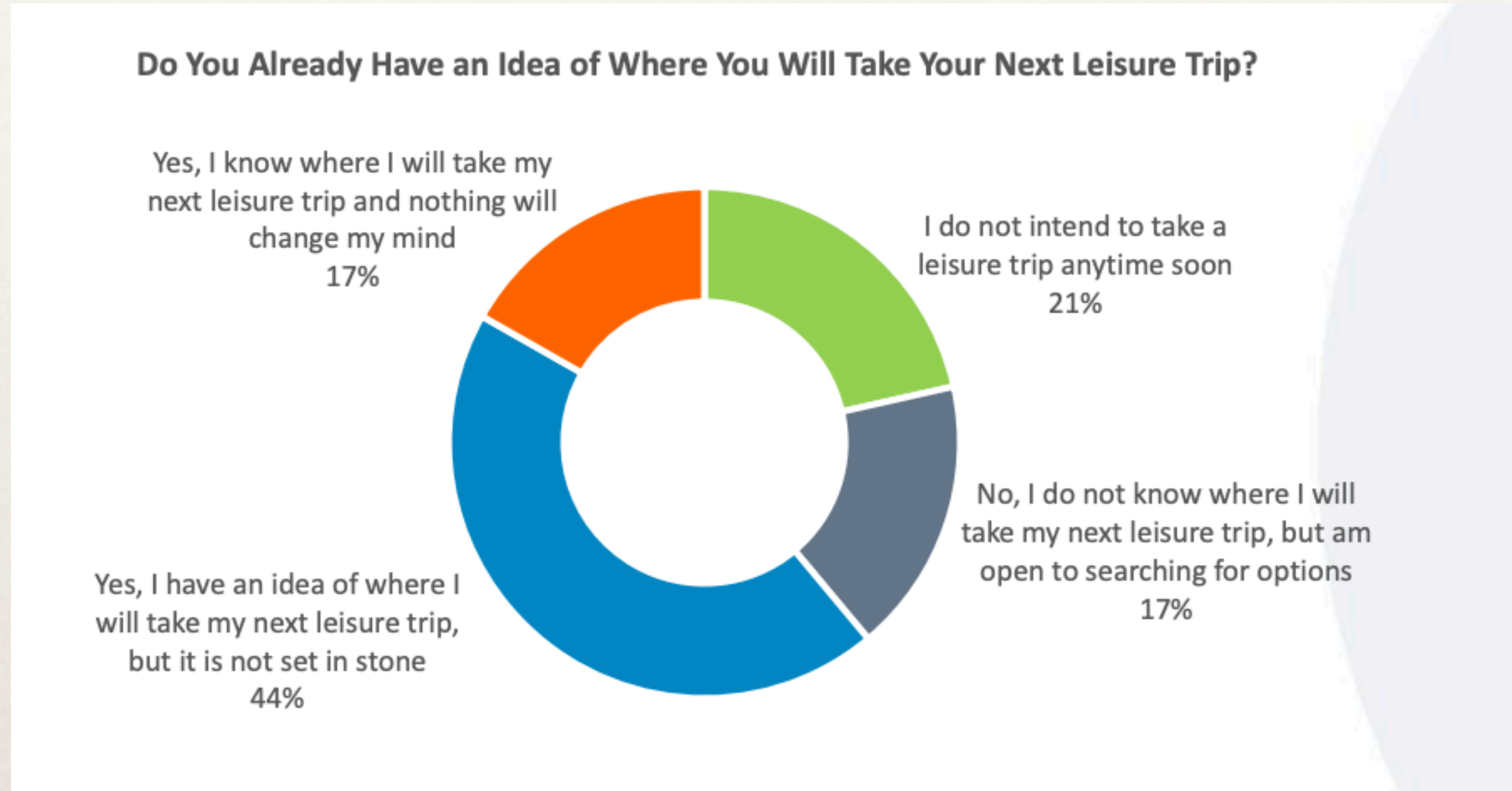
Based upon what you know today about the COVID-19 pandemic, which of the following statements best reflects when you think you would be comfortable planning a leisure trip again?

RESPONDENT BASE: 150n Wave 7 | 1,054n Summary to Date

6

Interested in the full set of results? Visit h2rmarketresearch.com/h2r-covid-update or email info@h2rmarketresearch.com

**THE MAJORITY WHO WILL TRAVEL HAVE ALREADY DECIDED WHERE THEY ARE GOING,
BUT THERE IS STILL OPPORTUNITY TO PERSUADE TRAVELERS' DECISIONS**

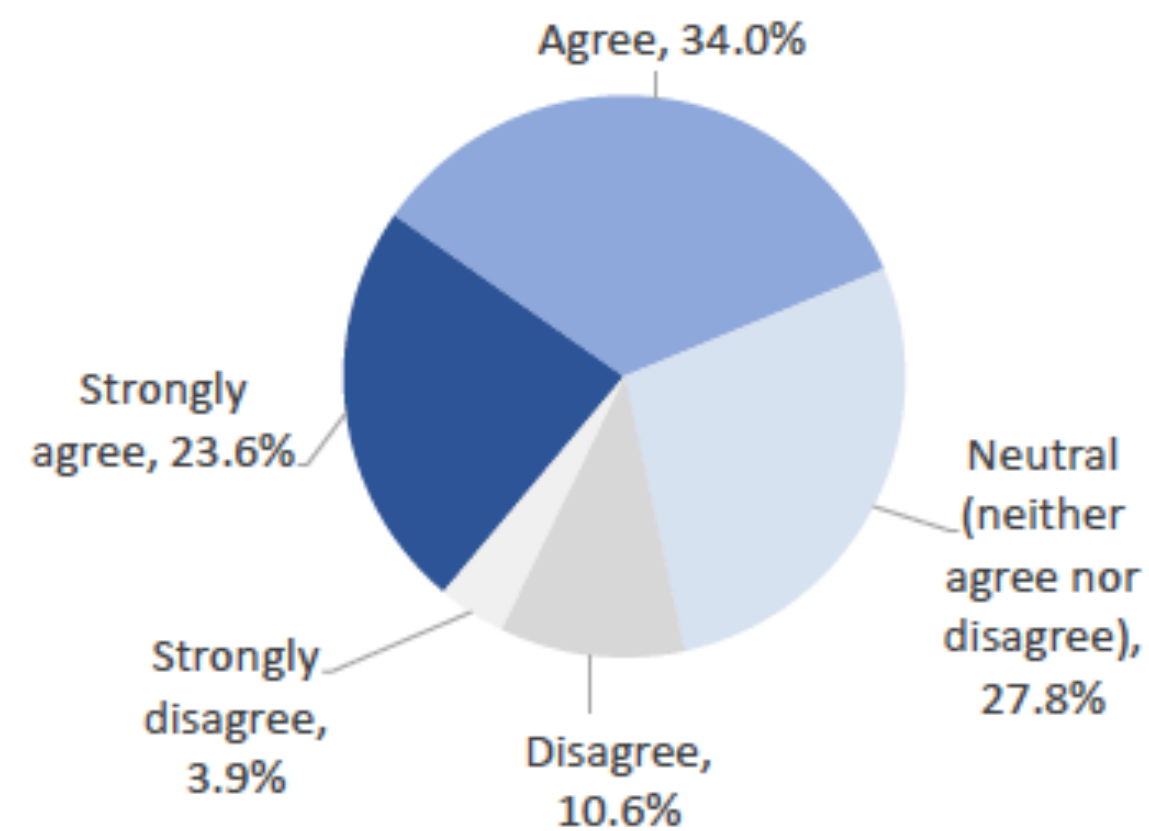


STAYCATIONS ARE BECOMING MORE LIKELY THIS SUMMER

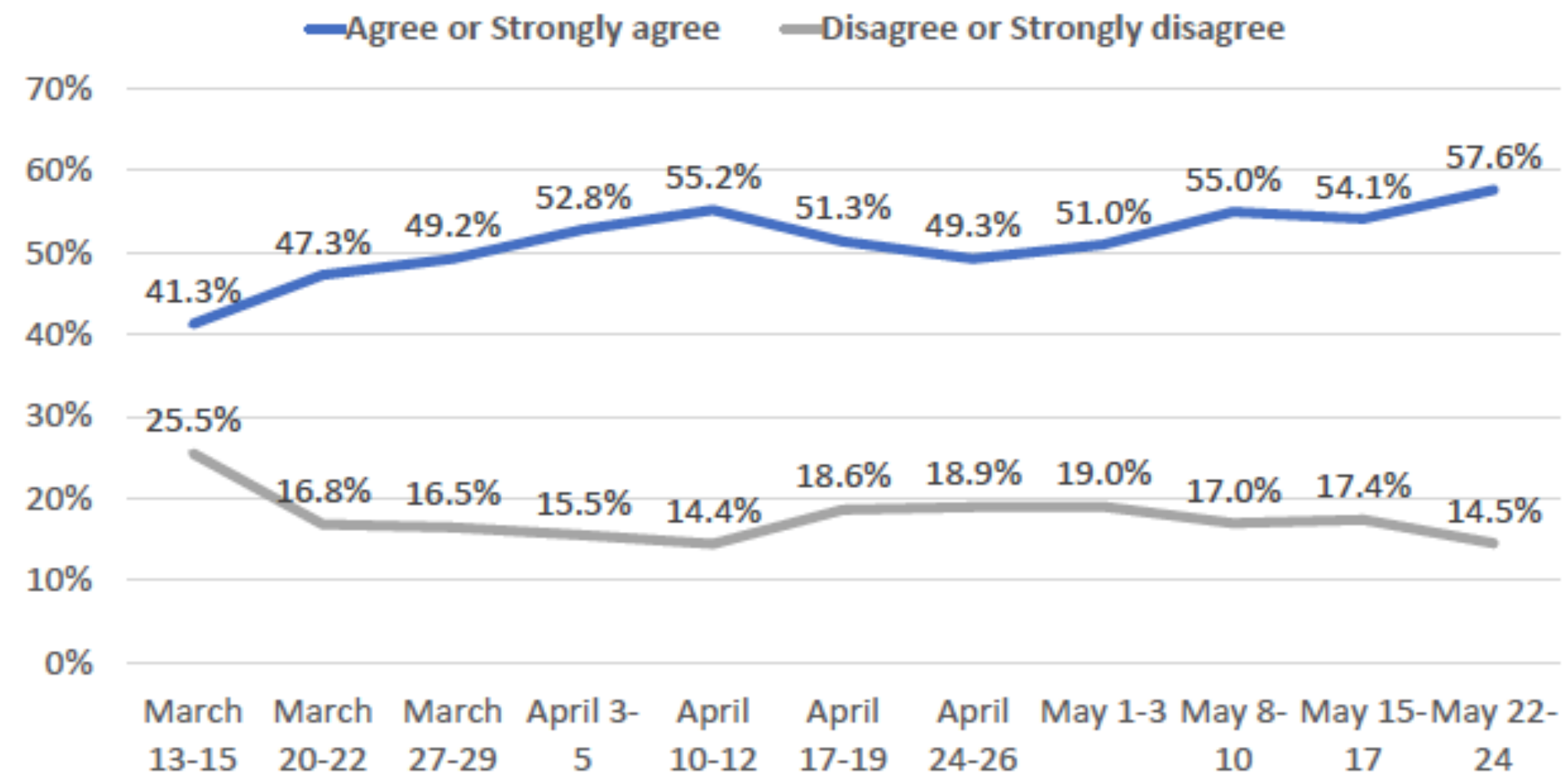
Staycations as a Replacement for Vacations

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17 and 22-24, 2020)

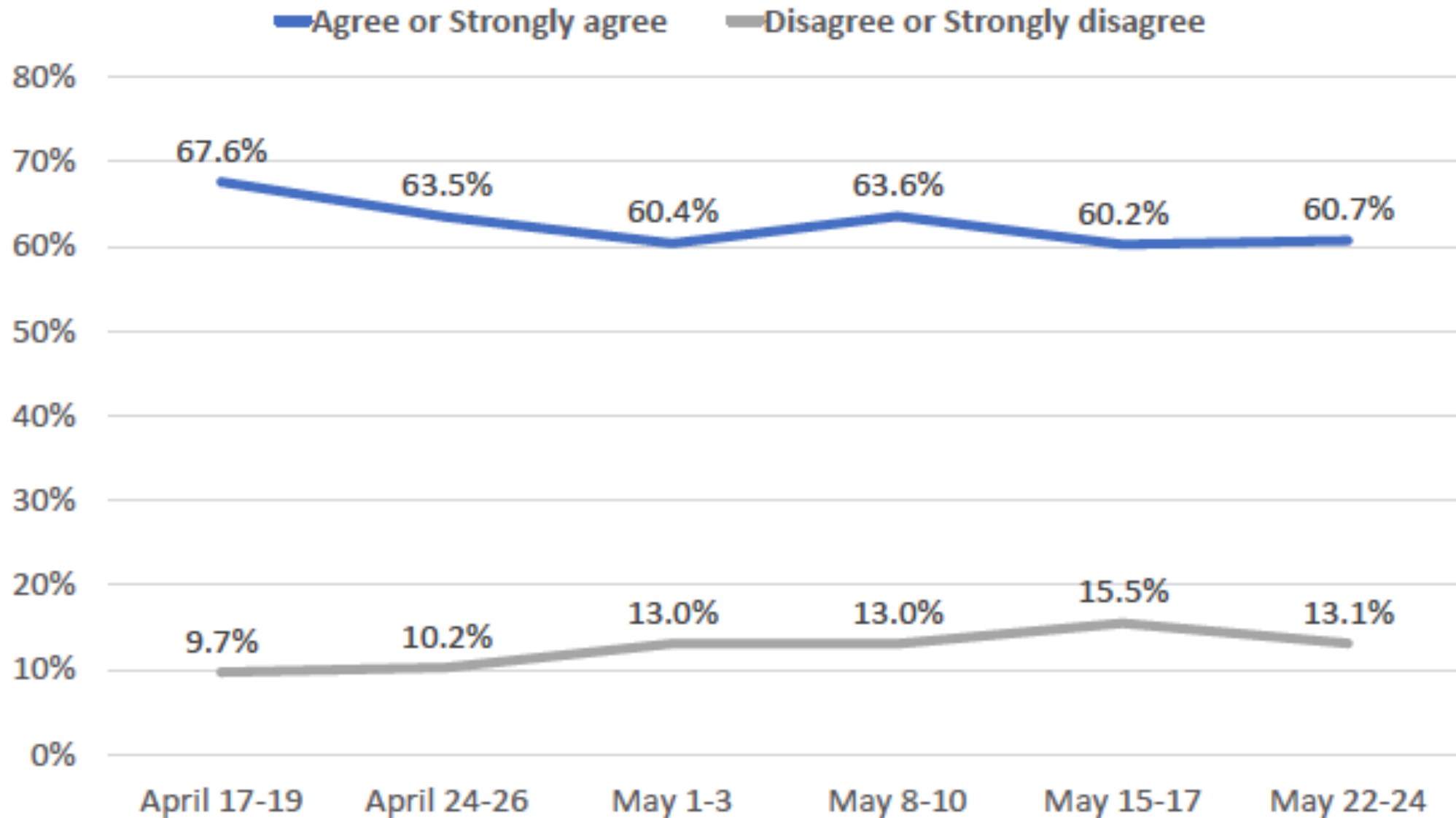
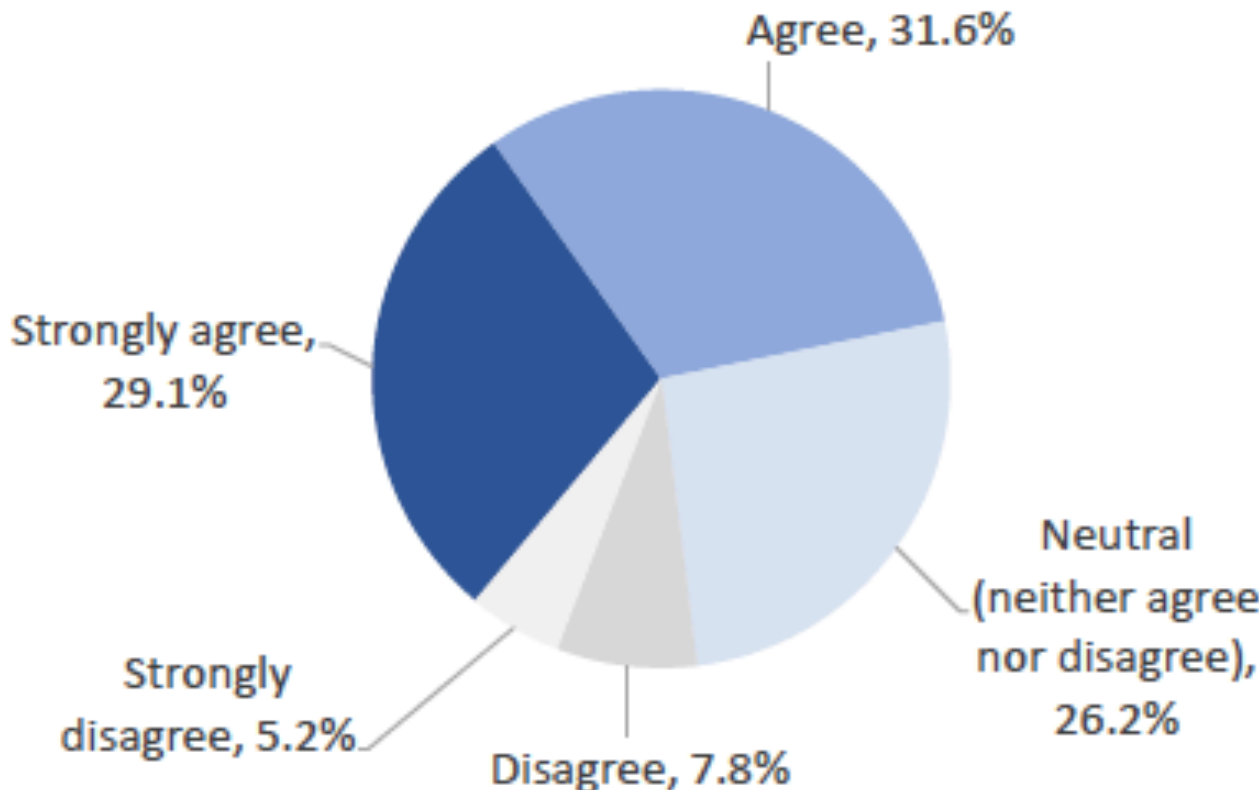


SIX IN TEN STILL DON'T WANT TRAVELERS IN THEIR COMMUNITY RIGHT NOW

Travelers in Community are Unwanted

How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.



(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17 and 22-24, 2020)

KEY TAKEAWAYS

1

Travelers continue to feel safest in their car and outside and show interest in outdoor activities, scenic beauty, and parks

2

Americans continue to put off travel and those who expect to travel in the fall decreased from 41.8% last week to 35.6% this week

3

Road trips and staycations are becoming more likely this summer as travel plans continue to be impacted by COVID

4

The majority of those who plan to travel already have a destination in mind, but there is still opportunity to influence travelers' decisions with the right messaging