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TENNESSEE COVID-19 RESEARCH & INSIGHTS

9.14.2020



TRAVEL RESEARCH PARTNERS

IMPACT & FORECASTING



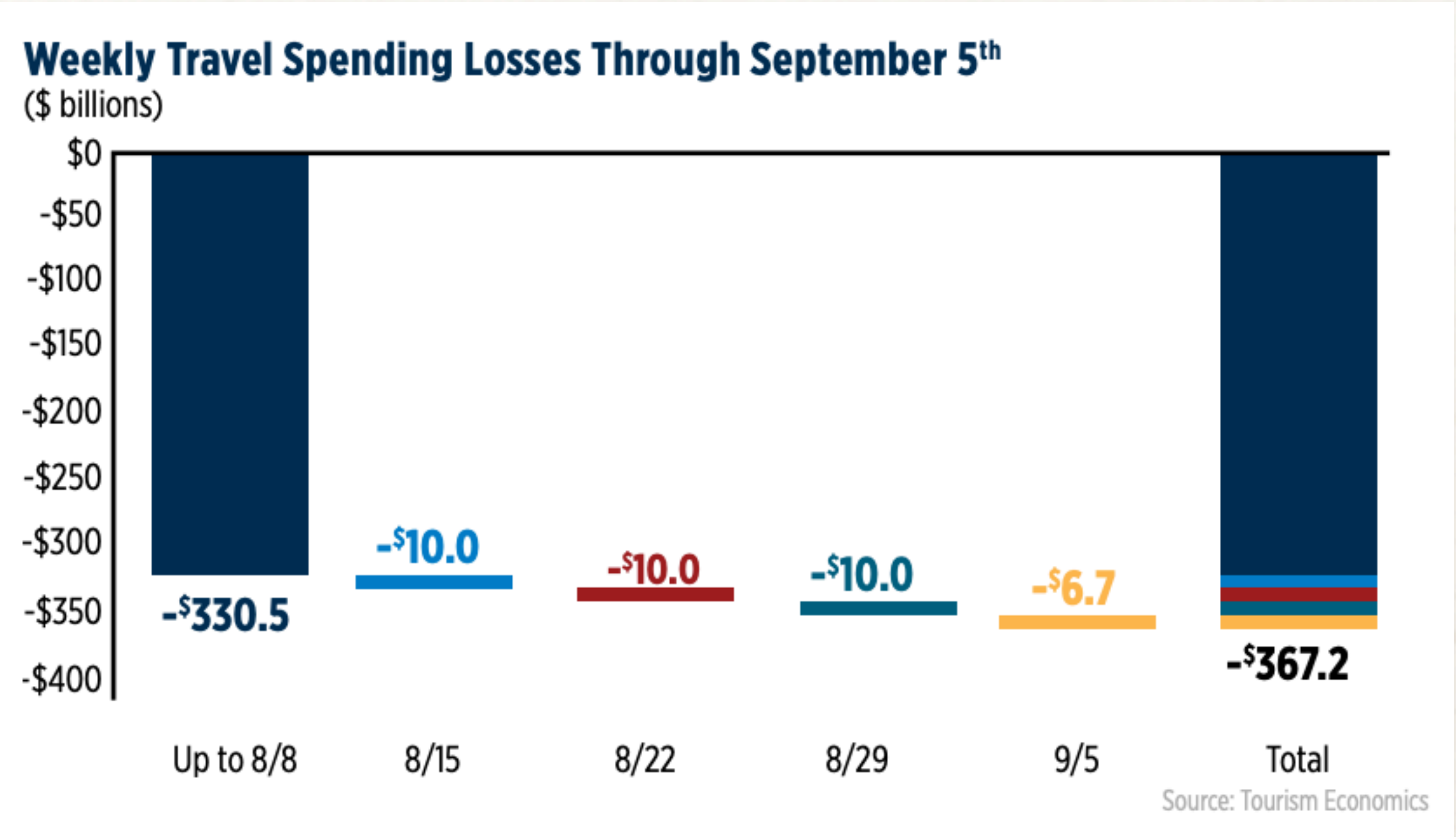
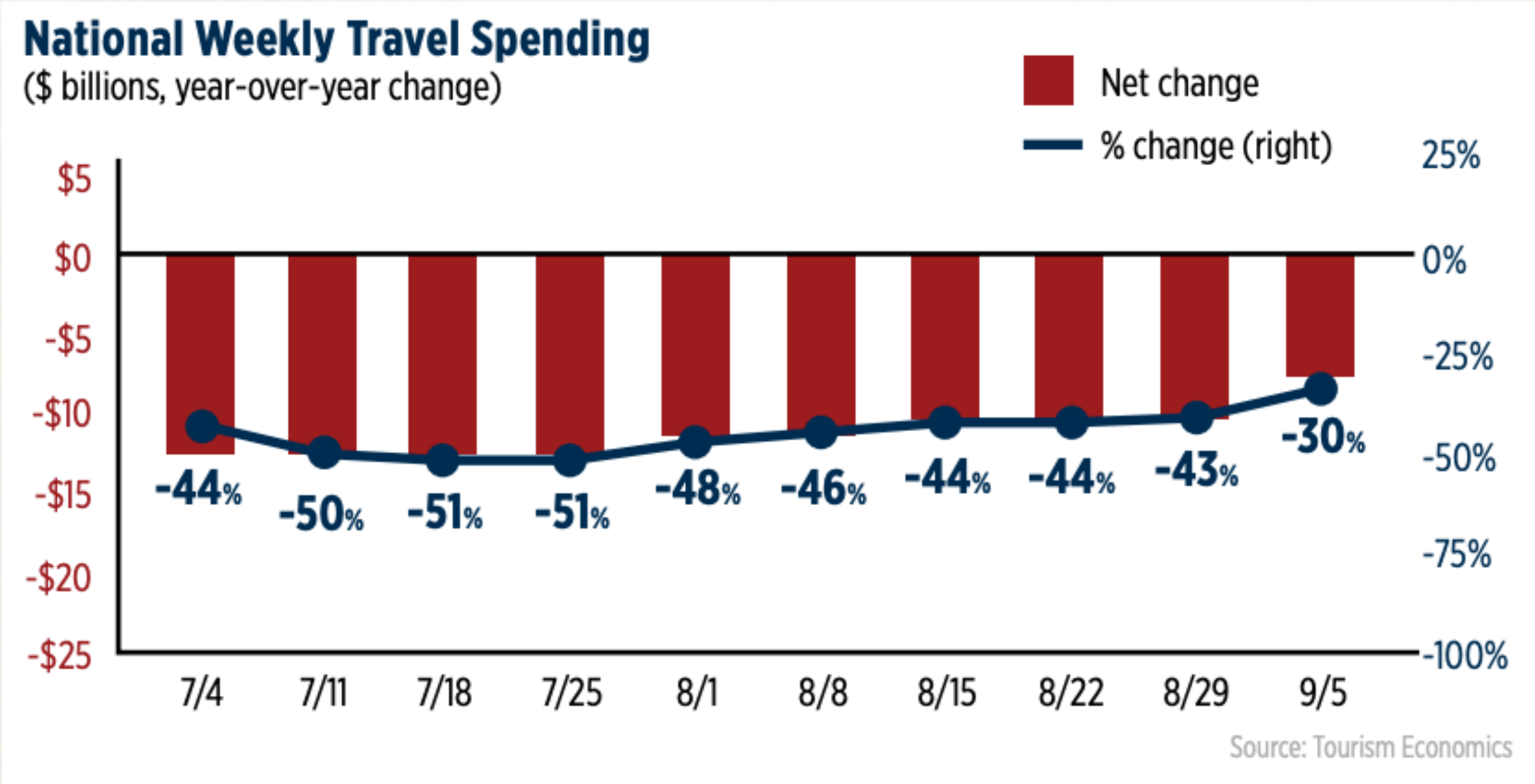
SENTIMENT



CONSUMER BEHAVIOR

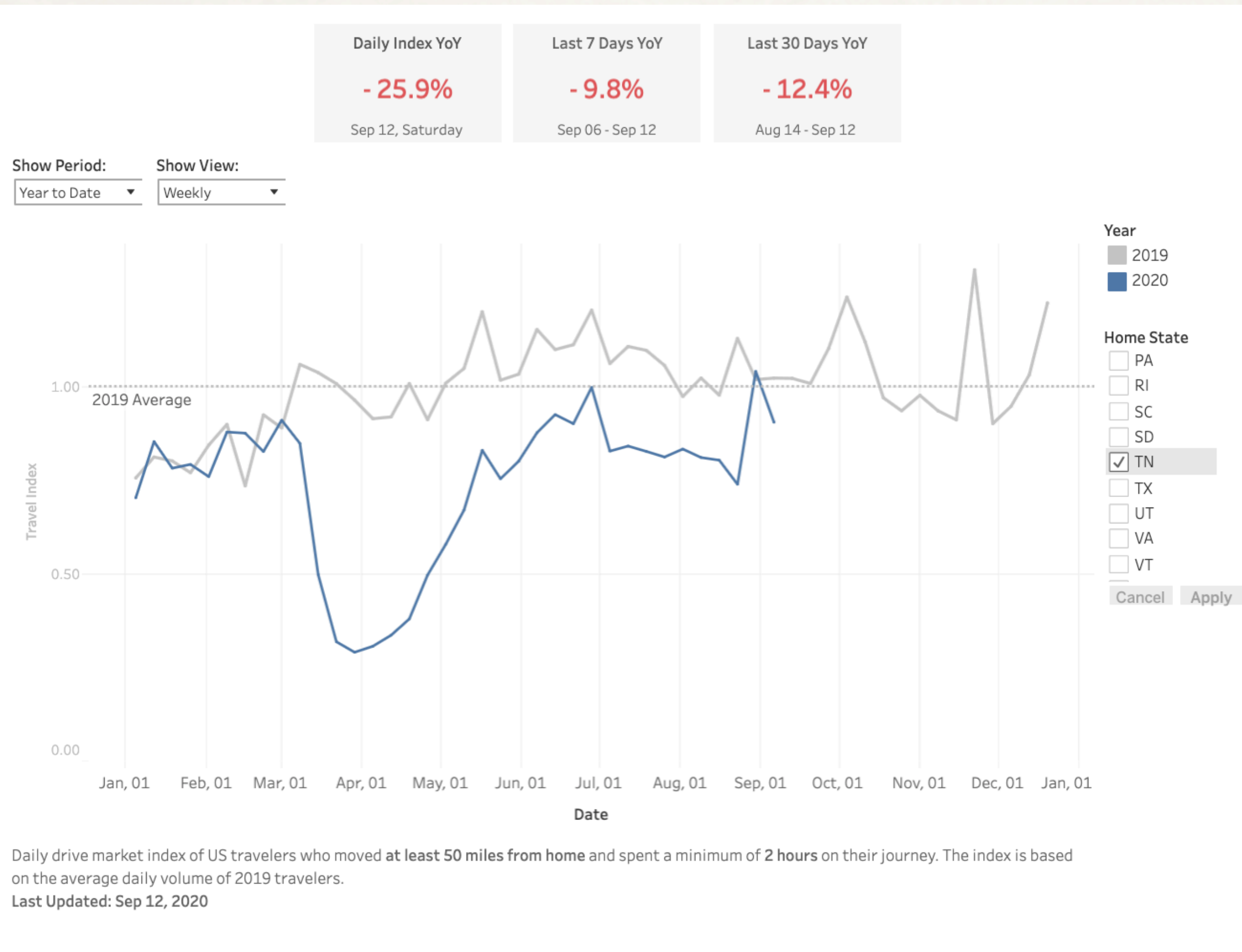


WEEKLY TRAVEL SPENDING - U.S. & TENNESSEE

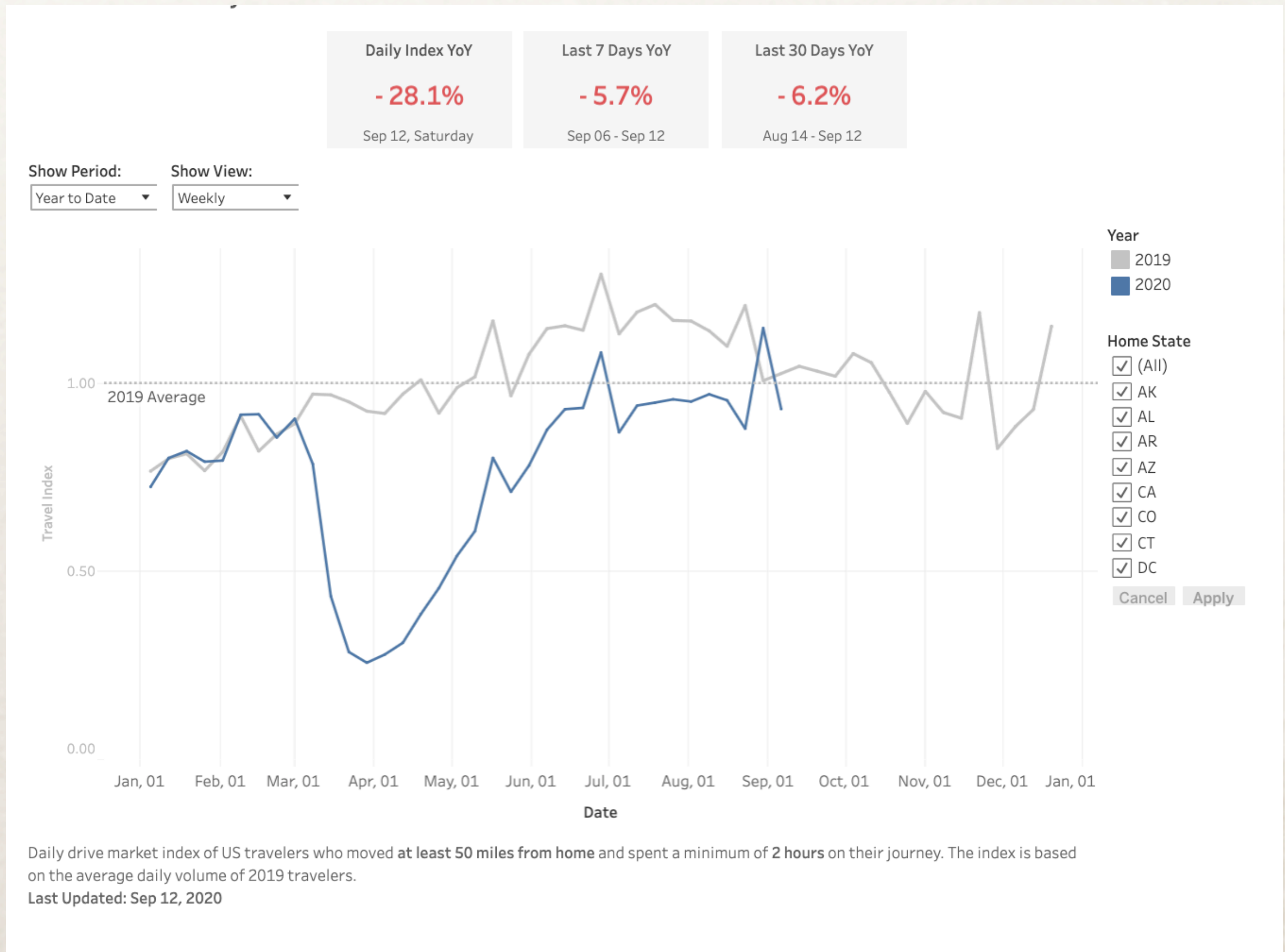


Tennessee Travel Spending																				
Week Ending	25-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul	11-Jul	18-Jul	25-Jul	1-Aug	8-Aug	15-Aug	22-Aug	29-Aug	5-Sep
Spending (\$ Millions)	51	57	68	73	130	185	216	234	247	270	303	263	261	263	272	279	279	292	257	309
Pecent Change over 2019	-89%	-87%	-85%	-84%	-71%	-58%	-54%	-50%	-47%	-42%	-35%	-43%	-44%	-43%	-40%	-38%	-38%	-36%	-43%	-29%

TENNESSEE WEEKLY TRAVEL INDEX DOWN -9.8% OVER THE PREVIOUS WEEK (9/6-9/12)

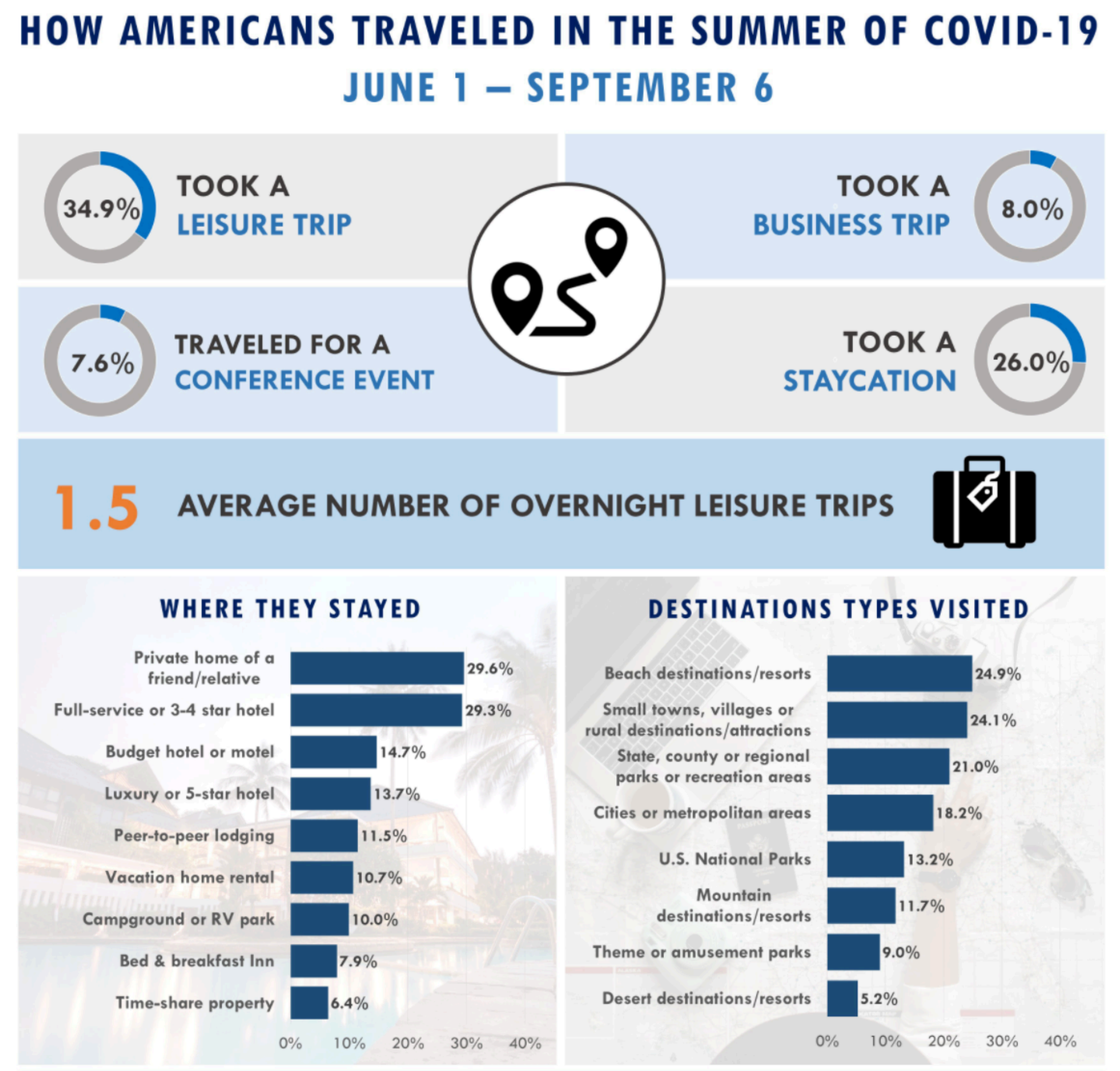


Tennessee



U.S.

OVER ONE-THIRD (35%) OF RESPONDENTS REPORTED TAKING A LEISURE TRIP BETWEEN JUNE 1 AND LABOR DAY.

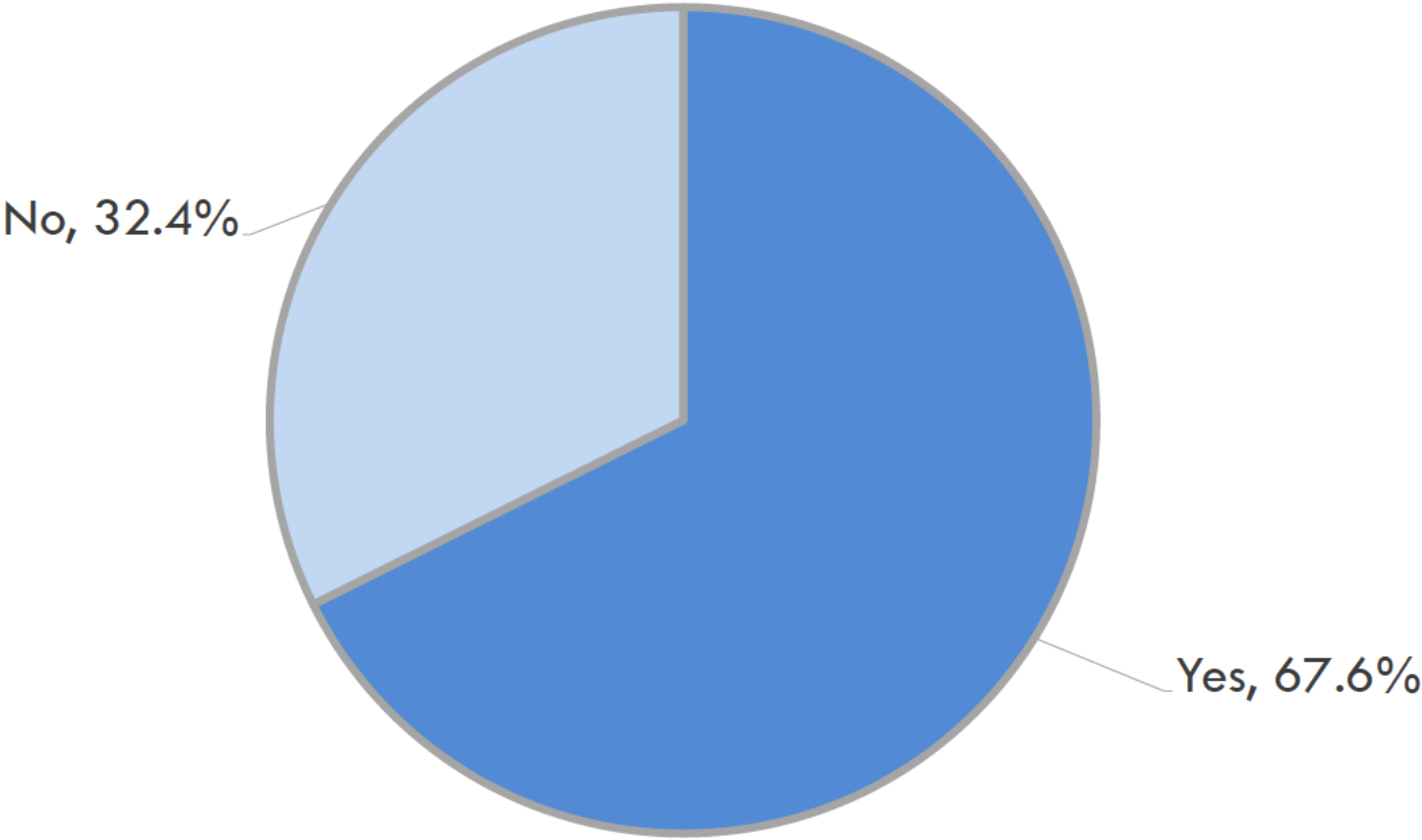


THE MAJORITY OF SUMMER LEISURE TRAVELER RESEARCHED CORONAVIRUS-RELATED RULES AND REGULATIONS FOR THE DESTINATION THEY VISITED.

SUMMER LEISURE TRAVELERS: RESEARCHING DESTINATION SAFETY RULES

Question: Prior to your most recent leisure trip, did you research the Coronavirus-related rules and regulations (masks, restaurant protocols, quarantine laws, etc.) for the destinations you visited?

(Base: Wave 26 data. Respondents taking a summer leisure trip, 413 completed surveys. Data collected September 4-6, 2020)

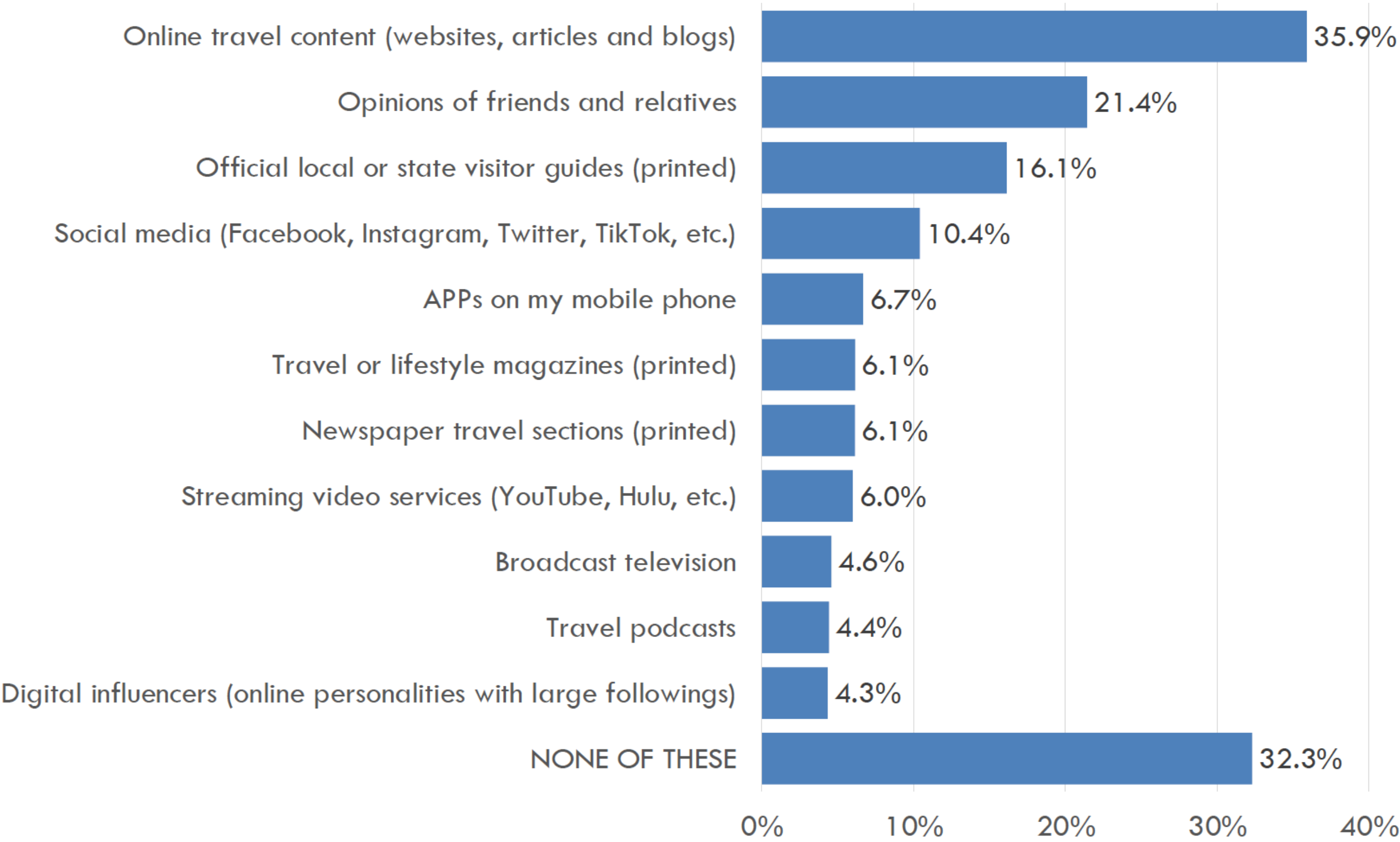


SUMMER TRAVELERS USED ONLINE TRAVEL CONTENT, OPINIONS OF FRIENDS AND FAMILY, VACATION GUIDES, AND SOCIAL MEDIA TO HELP PLAN THEIR LEISURE TRIP.

SUMMER LEISURE TRAVELERS: TRAVEL PLANNING RESOURCES

Question: Which of the following resources did you use to help plan your most recent leisure trip? (Select all that apply)

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys. Data collected September 4-6, 2020)

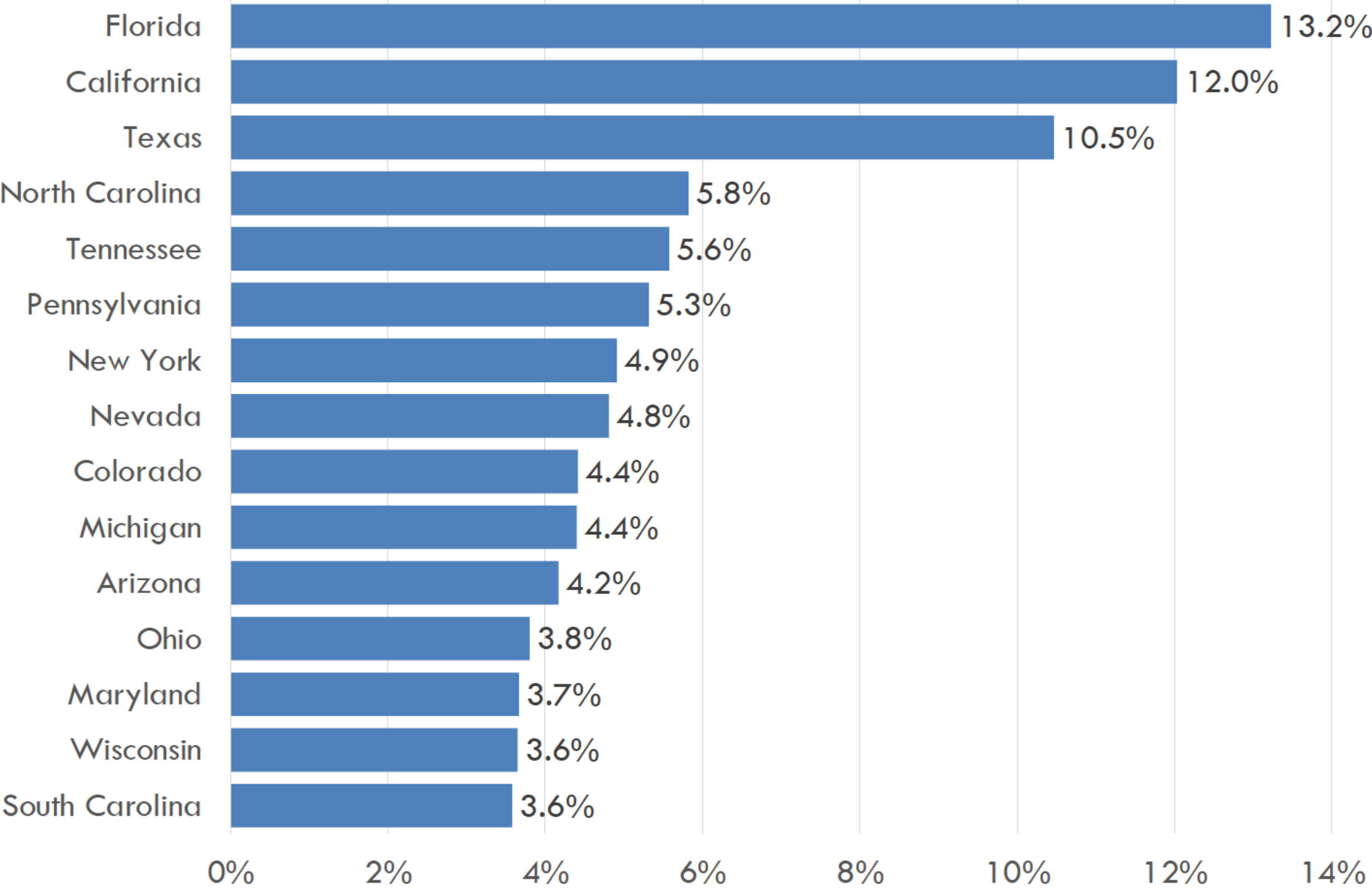


TENNESSEE WAS IN THE TOP FIVE STATES SUMMER LEISURE TRAVELERS VISITED.

SUMMER LEISURE TRAVELERS: STATES VISITED

Question: Which did you visit (or travel withing) on any leisure trip(s) this summer?

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys. Data collected September 4-6, 2020)



THE GREAT SMOKY MOUNTAIN NATIONAL PARK HAD YEAR-OVER-YEAR GROWTH FOR RECREATIONAL VISITS.

Great Smoky Mountain National Park



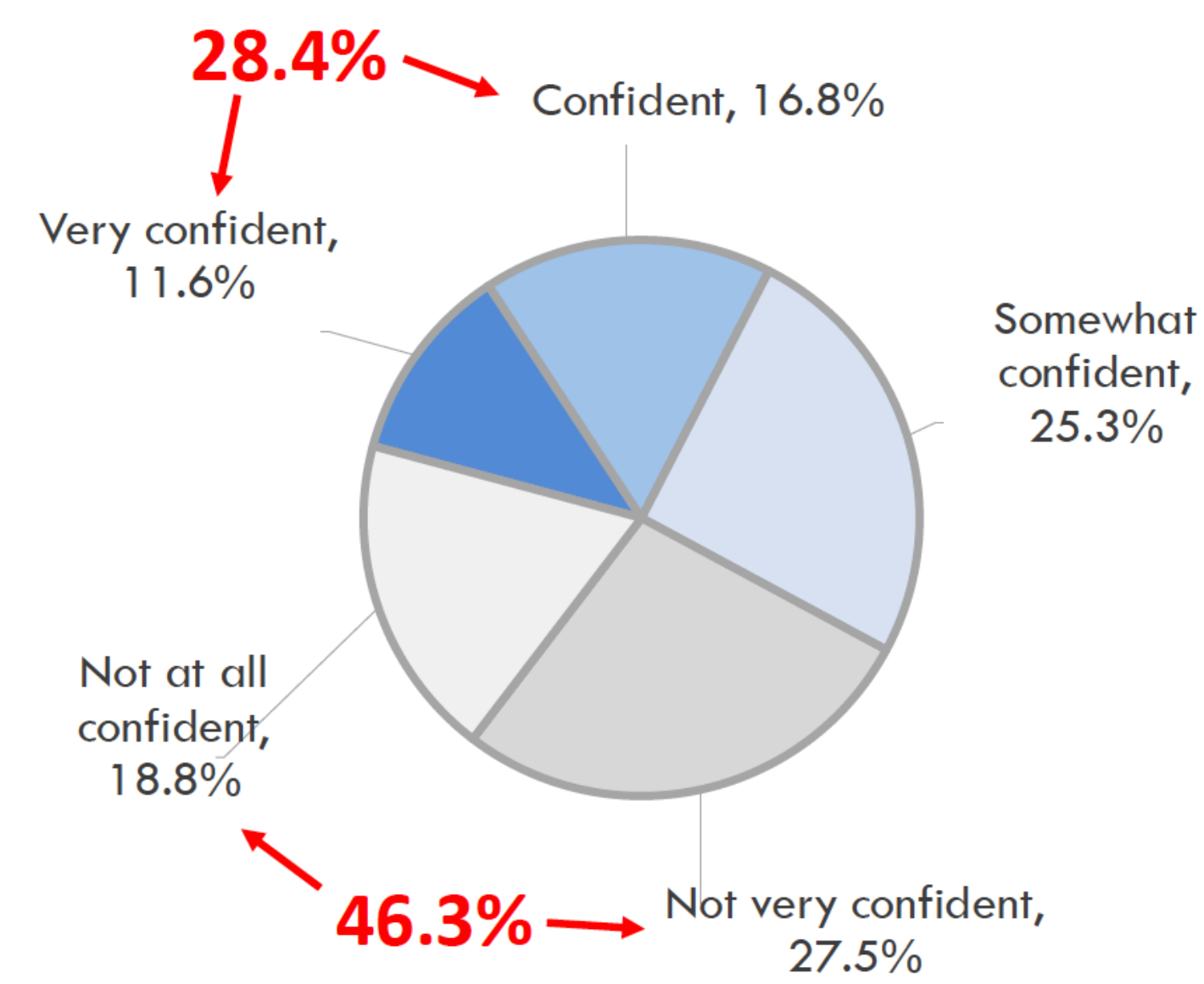
Source: National Park Service



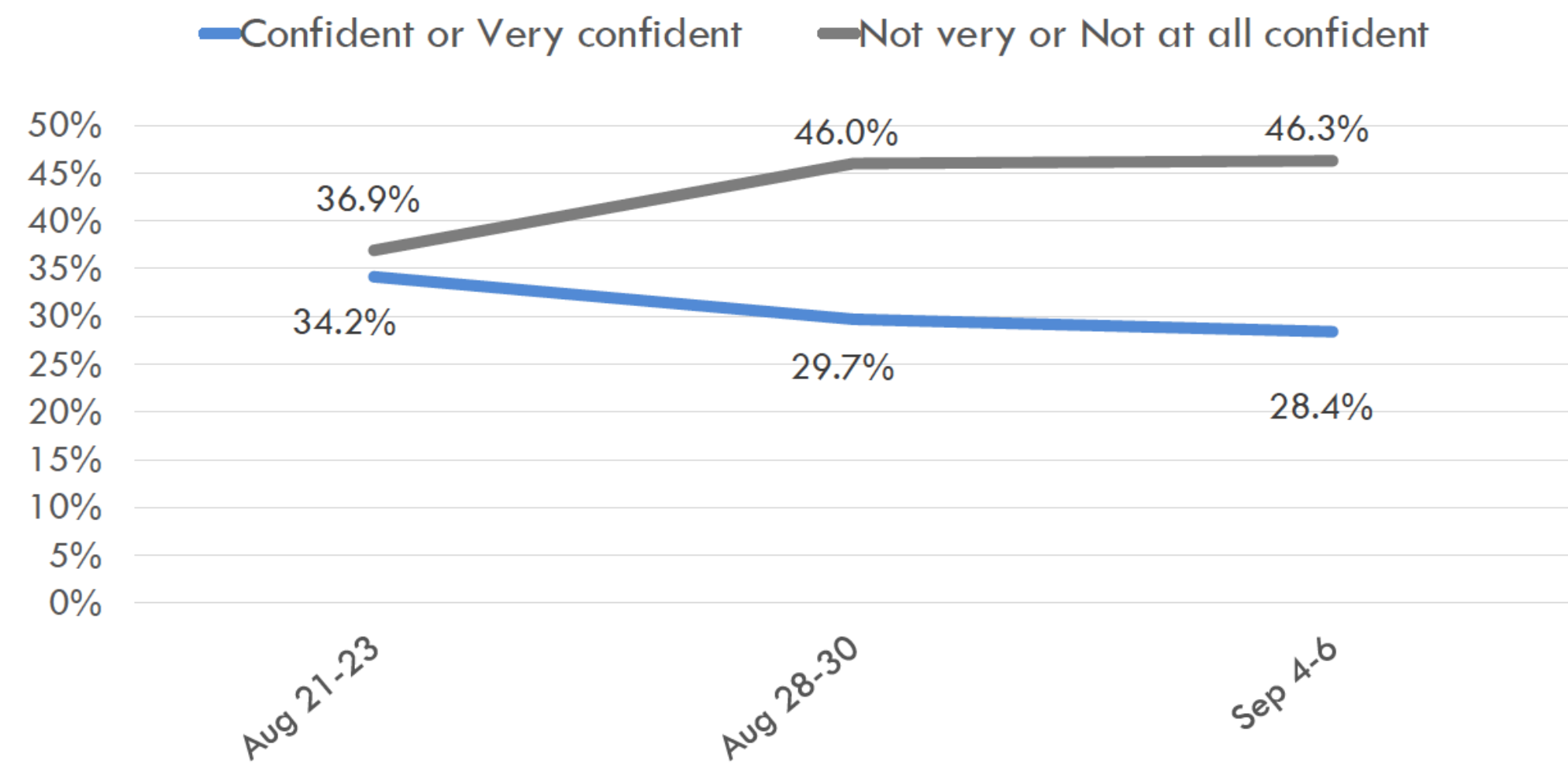
ALMOST HALF OF TRAVELERS DO NOT FEEL CONFIDENT THAT THEY CAN TRAVEL SAFELY RIGHT NOW.

CONFIDENCE IN TRAVELING SAFELY

Question: How confident are you that you can travel safely in the current environment?



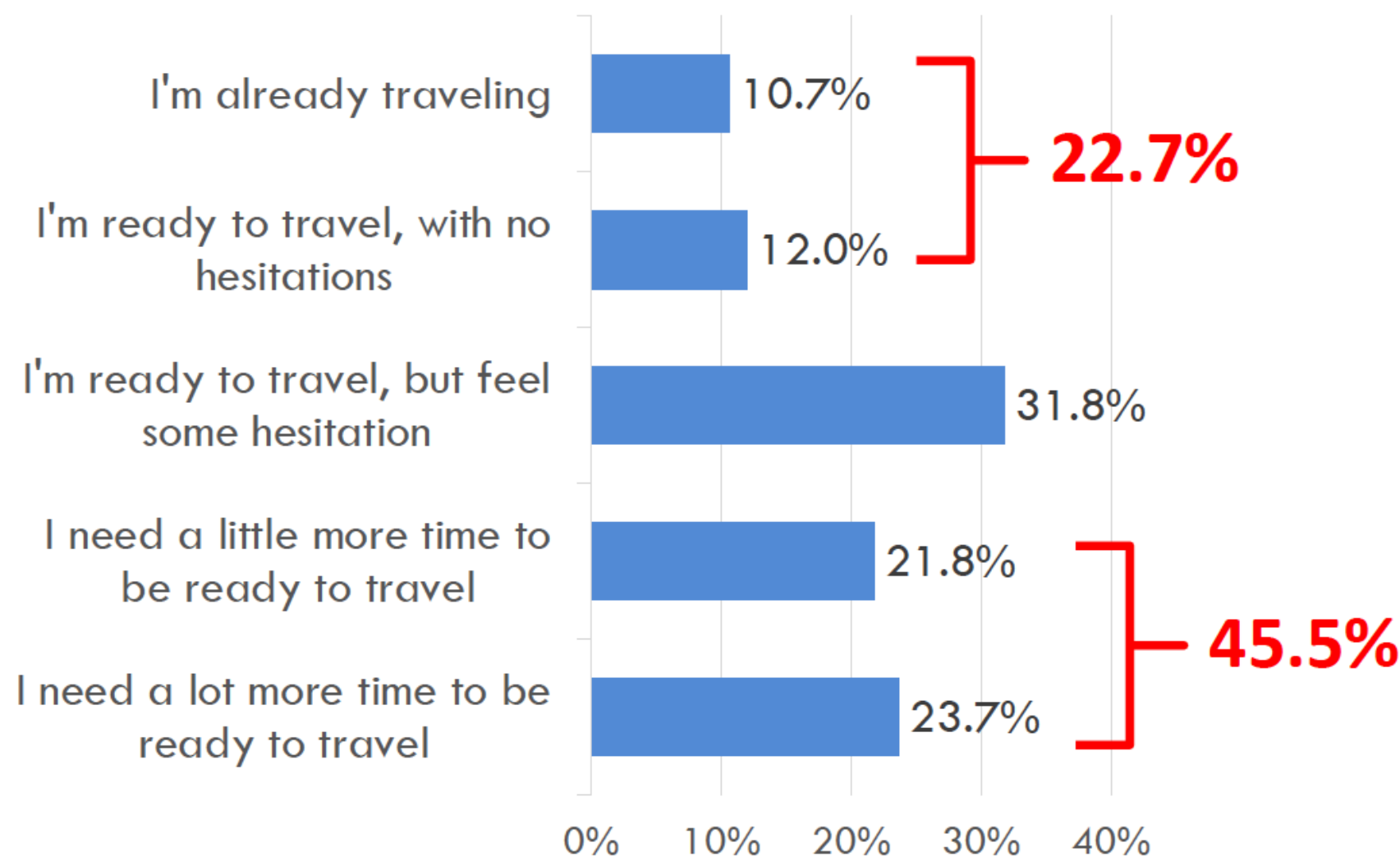
(Base: Wave 24-26 data. All respondents, 1,207, 1,250 and 1,225 completed surveys.)



OVER HALF OF AMERICAN TRAVELERS REMAIN IN A “READY TO TRAVEL” VERSUS “NEED MORE TIME” MINDSET.

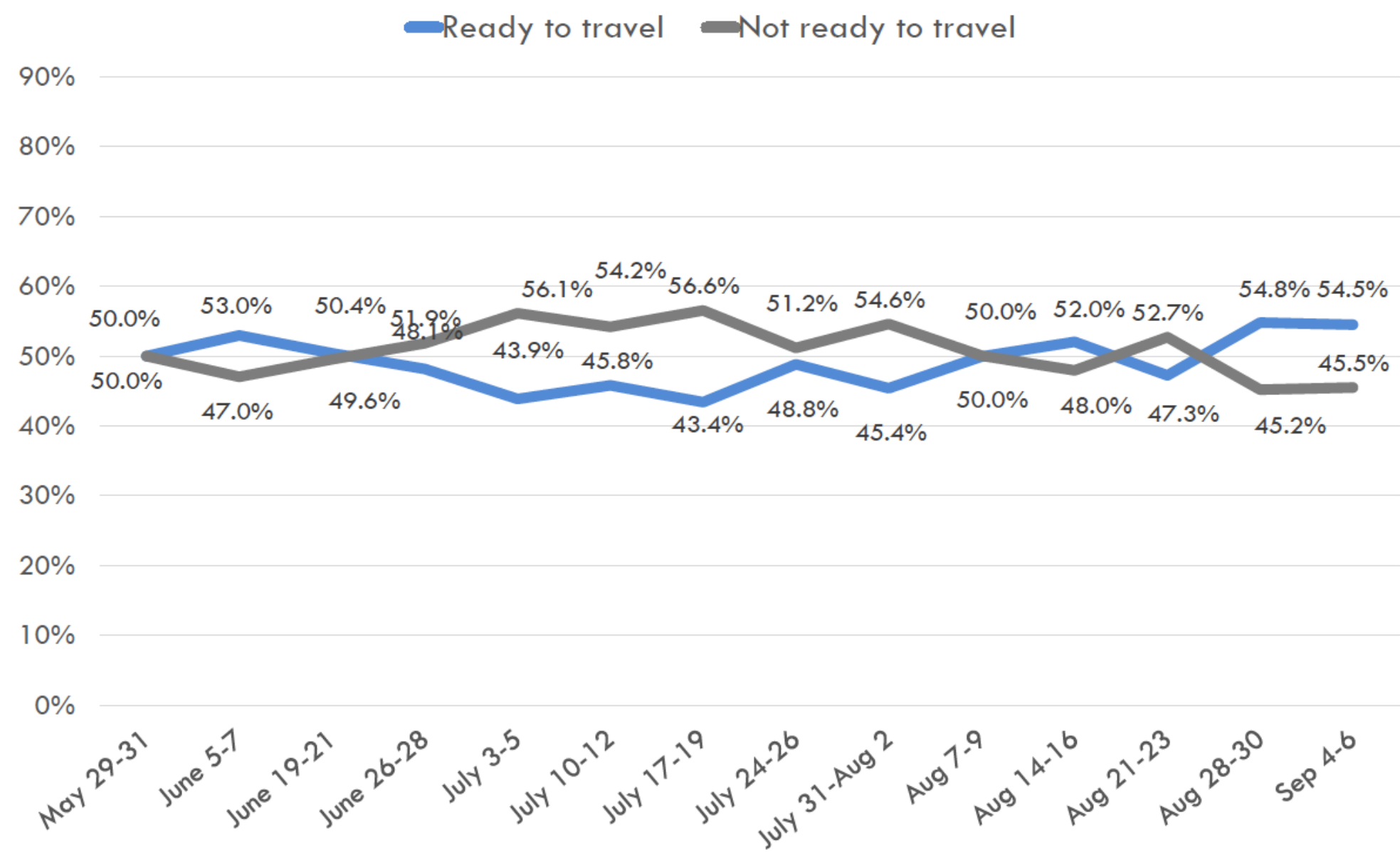
TRAVEL STATE-OF-MIND

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



(Base: Waves 12-13 and 15-26. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

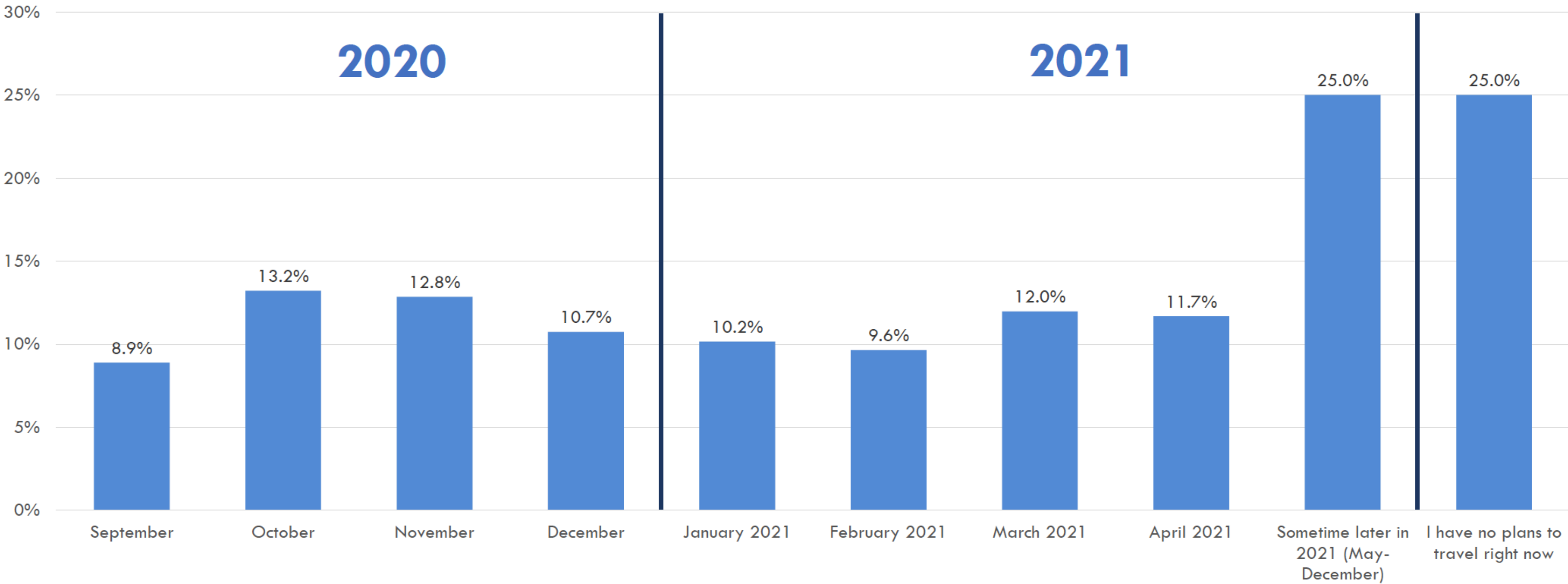
Historical data



75% OF RESPONDENTS CONTINUE TO REPORT THAT THEY HAVE AT LEAST TENTATIVE TRIP PLANS RIGHT NOW AND CLOSE TO ONE-THIRD (32%) EXPECT THEY WILL TRAVEL THIS FALL SEASON.

UPCOMING TRAVEL PLANS

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



(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)

KEY TAKEAWAYS

1

Over one-third of American travelers took a leisure trip in the Summer of COVID-19, with these trips providing a net increase in confidence that travel can be done safely right now.

2

Tennessee was a top five state that leisure travelers visited this summer. The Great Smoky National Park saw year-over-year visitor increases in June and July.

3

Over half of American travelers remain in a “ready to travel” versus “need more time” mindset and 75% continue to report that they have at least tentative trip plans.

4

Those who have traveled researched Coronavirus-related rules and regulations for their destination. Looking at how more (safe) travel can be inspired, online content, email, search engine marketing and social media are seemingly particularly effective.