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# TENNESSEE®



TENNESSEE COVID-19 RESEARCH & INSIGHTS

9.28.2020



# TRAVEL RESEARCH PARTNERS

## IMPACT & FORECASTING

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## SENTIMENT

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## CONSUMER BEHAVIOR

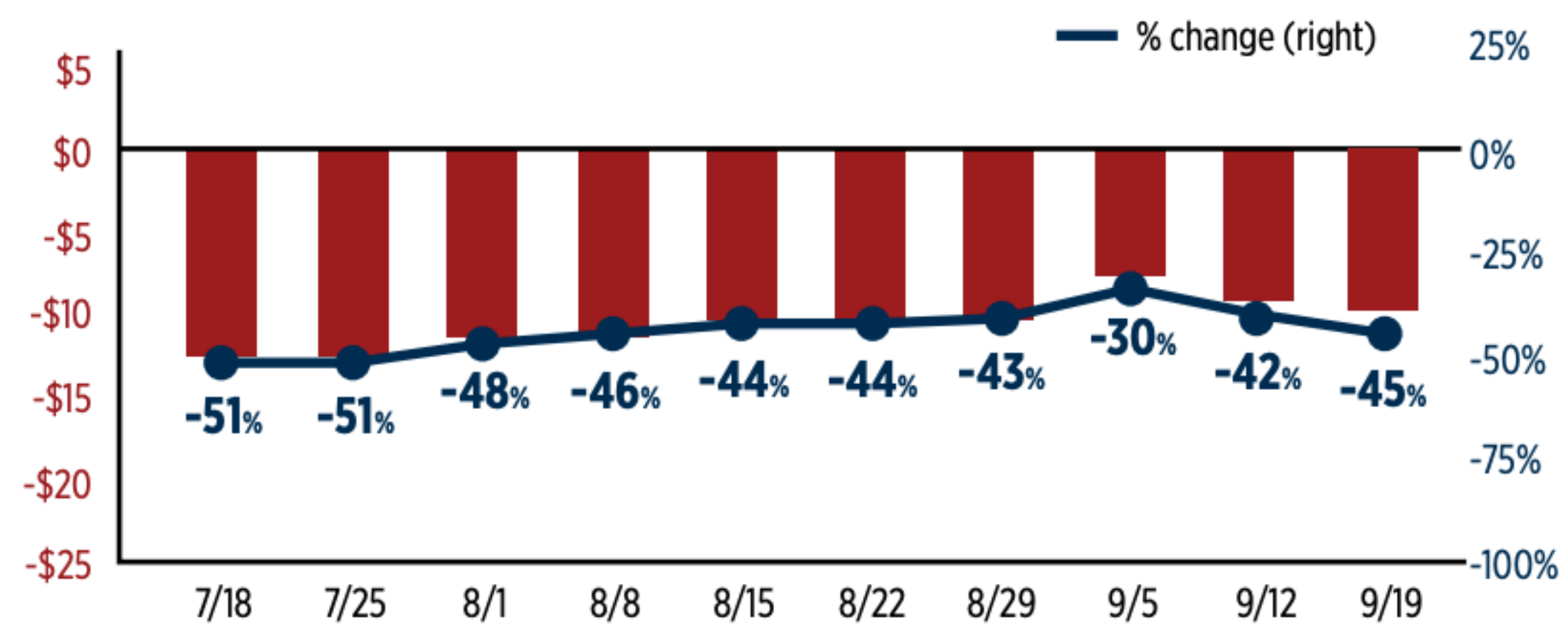
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# WEEKLY TRAVEL SPENDING - U.S. & TENNESSEE

## National Weekly Travel Spending

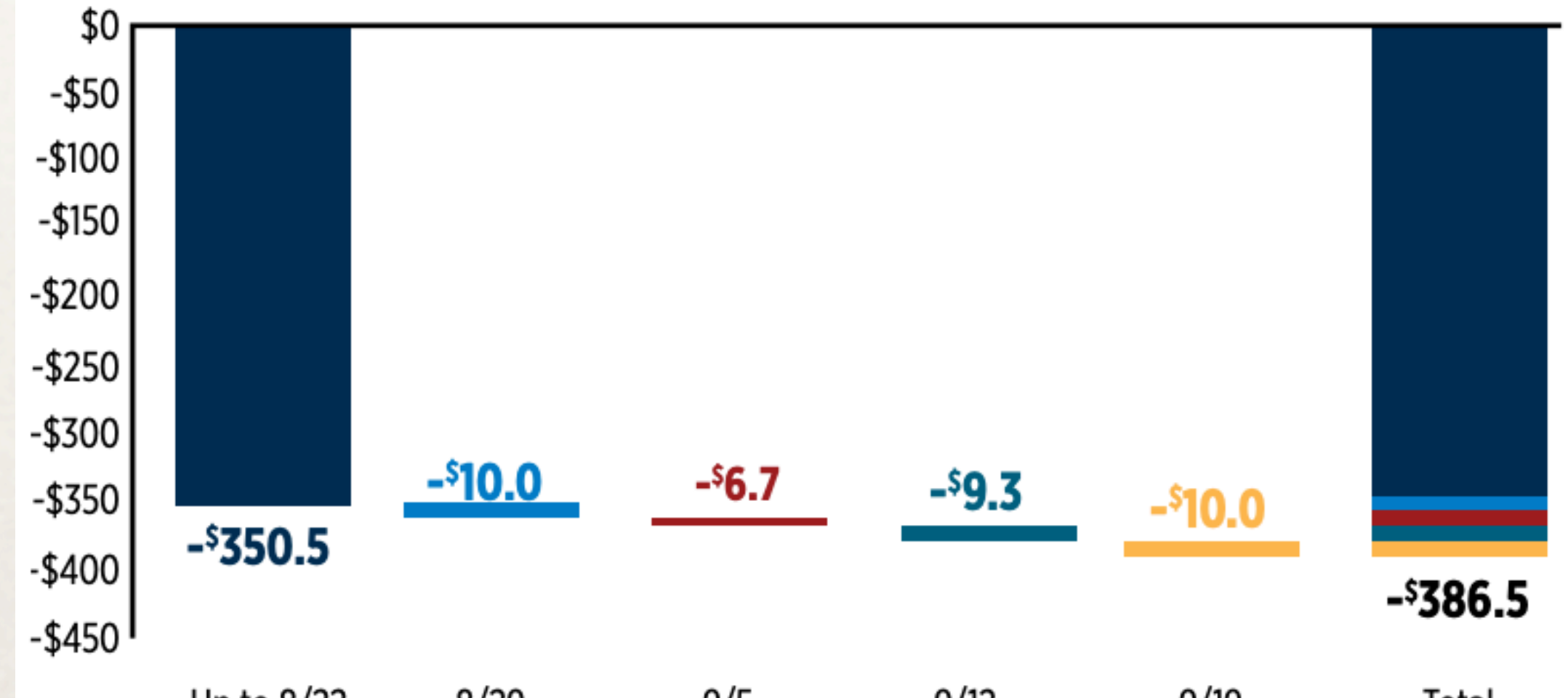
(\$ billions, year-over-year change)



Source: Tourism Economics

## Weekly Travel Spending Losses Through September 19<sup>th</sup>

(\$ billions)



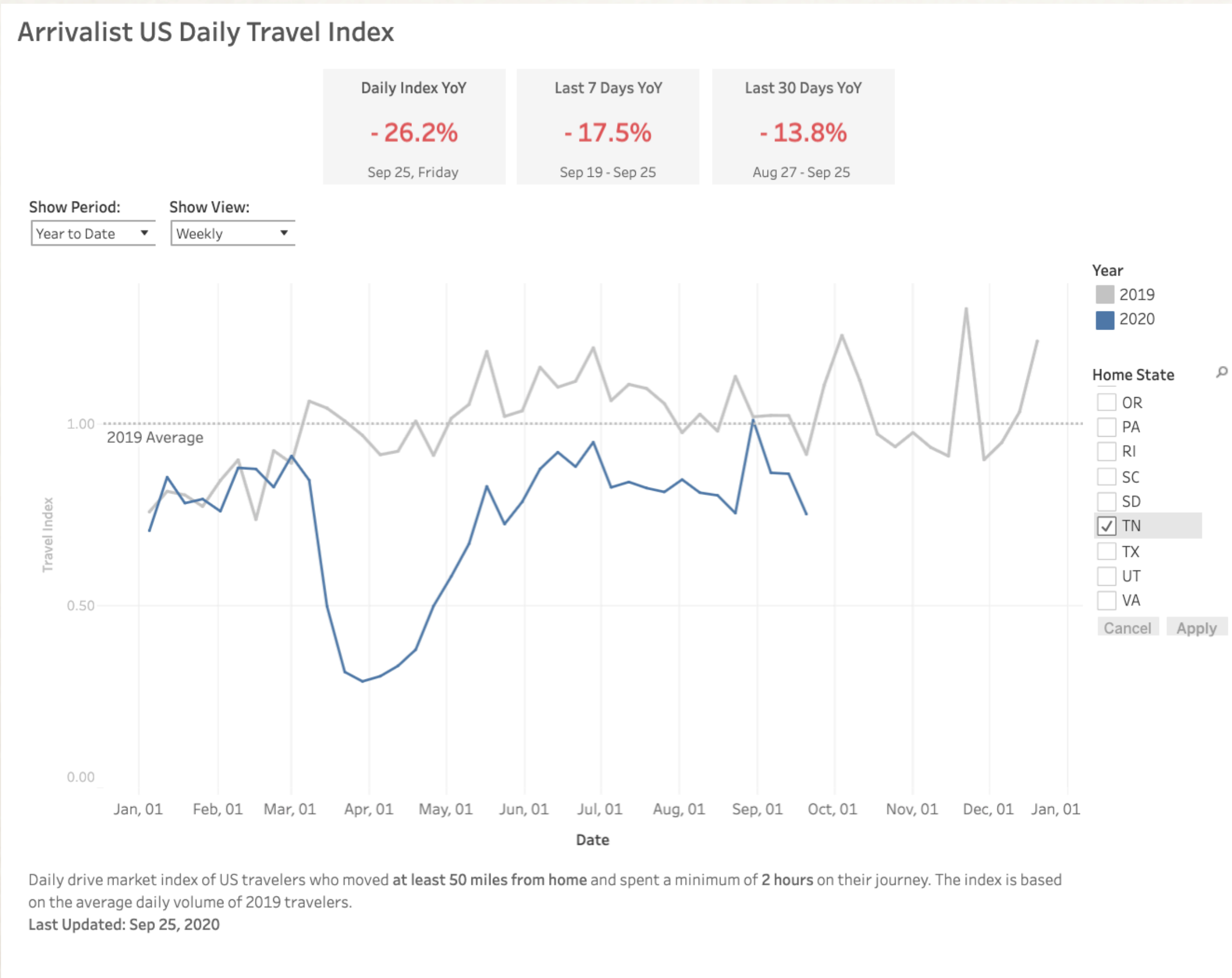
Source: Tourism Economics

## Tennessee Travel Spending

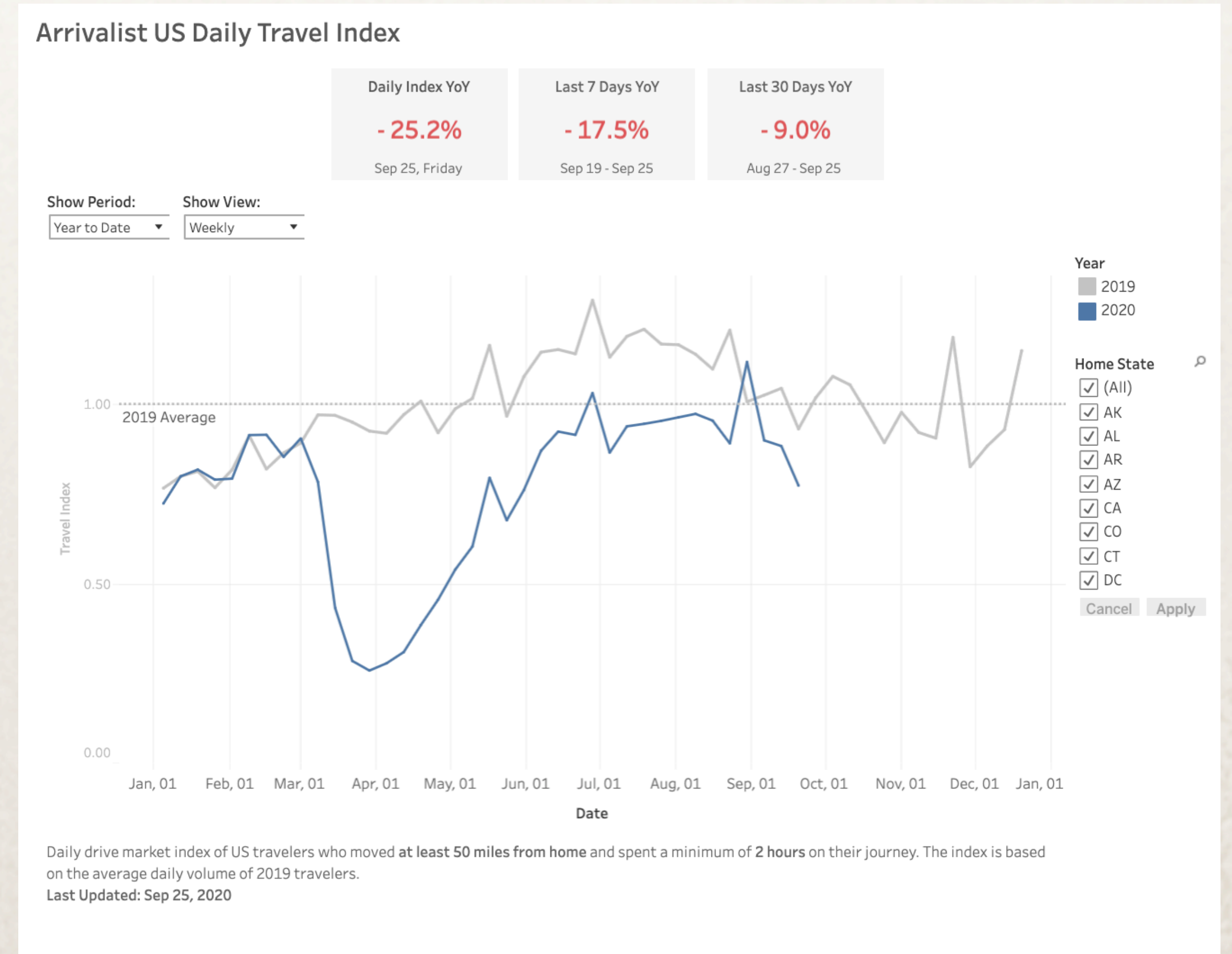
Week Ending	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul	11-Jul	18-Jul	25-Jul	1-Aug	8-Aug	15-Aug	22-Aug	29-Aug	5-Sep	12-Sep	19-Sep
Spending (\$ Millions)	68	73	130	185	216	234	247	270	303	263	261	263	272	279	279	292	257	309	267	277
Pecent Change over 2019	-85%	-84%	-71%	-58%	-54%	-50%	-47%	-42%	-35%	-43%	-44%	-43%	-40%	-38%	-38%	-36%	-43%	-29%	-39%	-37%

SOURCE: U.S. Travel

# TENNESSEE HOME STATE WEEKLY TRAVEL INDEX DOWN -17.5% OVER THE PREVIOUS WEEK (9/19-9/25)



Tennessee



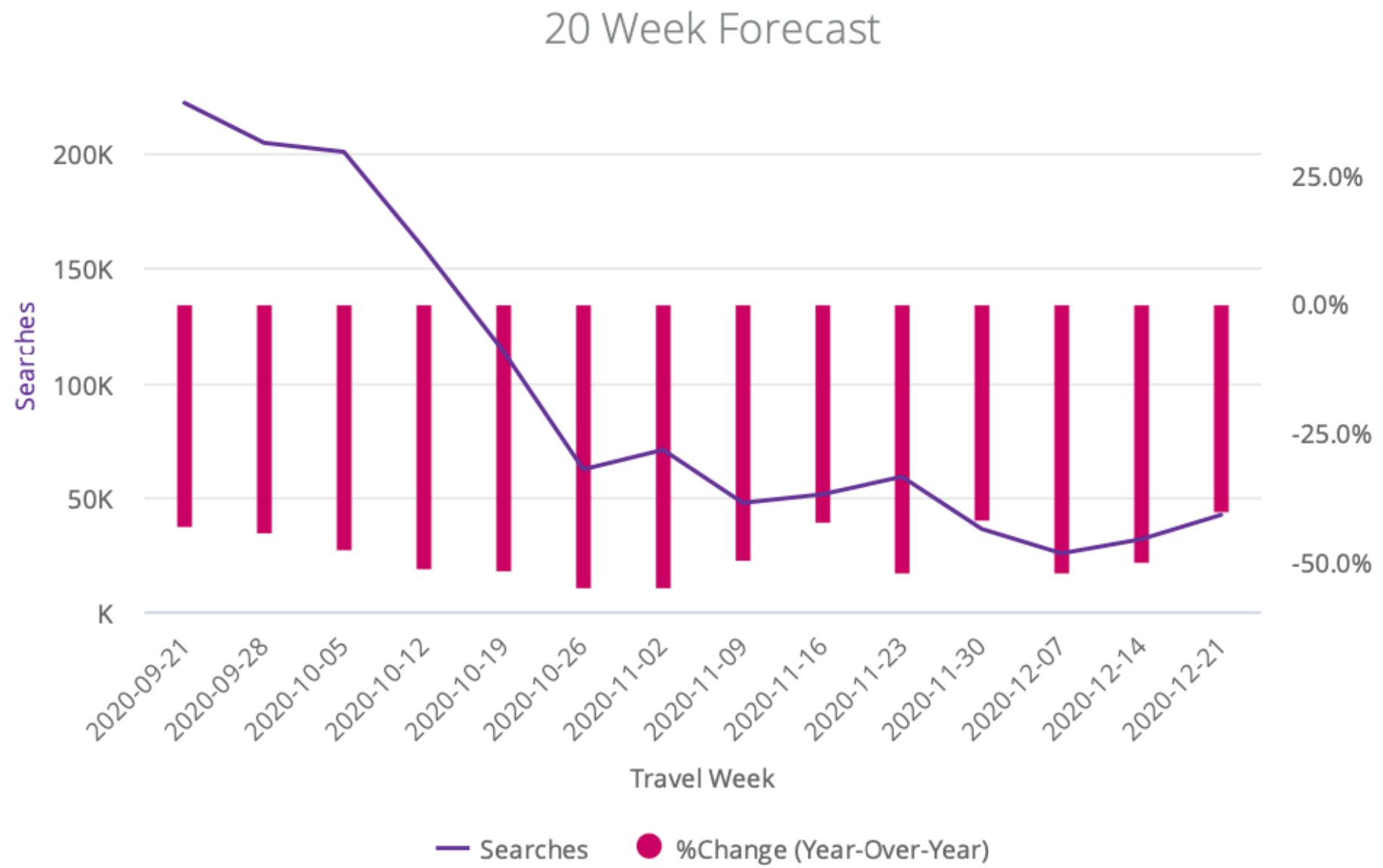
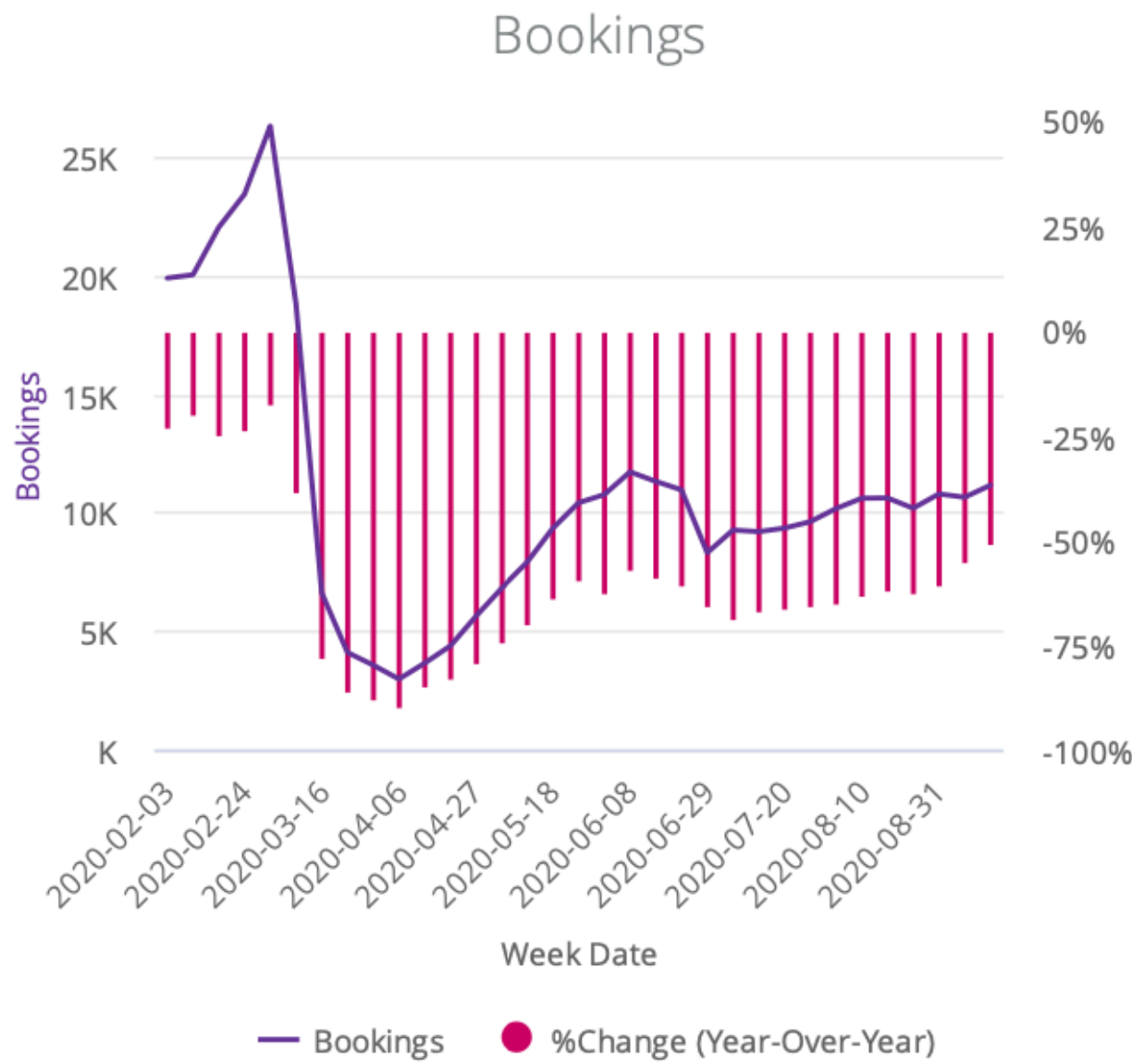
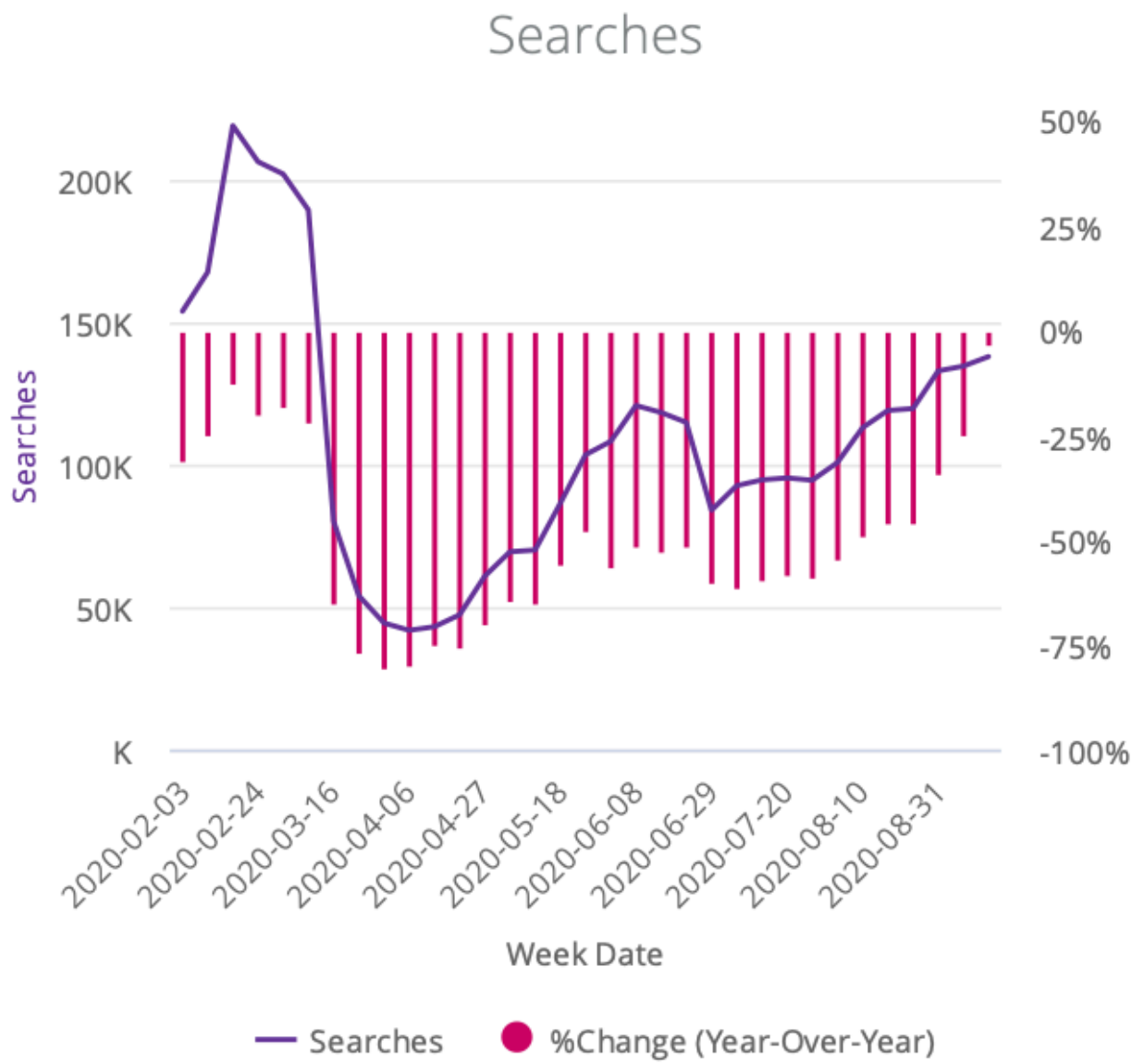
U.S.

**TENNESSEE WAS IN THE GROUP OF 14 STATES UP ACROSS THE BOARD IN ALL THREE CATEGORIES (HOTEL SEARCHES, HOTEL BOOKINGS, FORECASTED HOTEL SEARCHES) WEEK-OVER-WEEK.**

**TENNESSEE ADARA DATA**  
Weekly Tourism Stats (Origin = Worldwide)

Historical Data

Future Trend

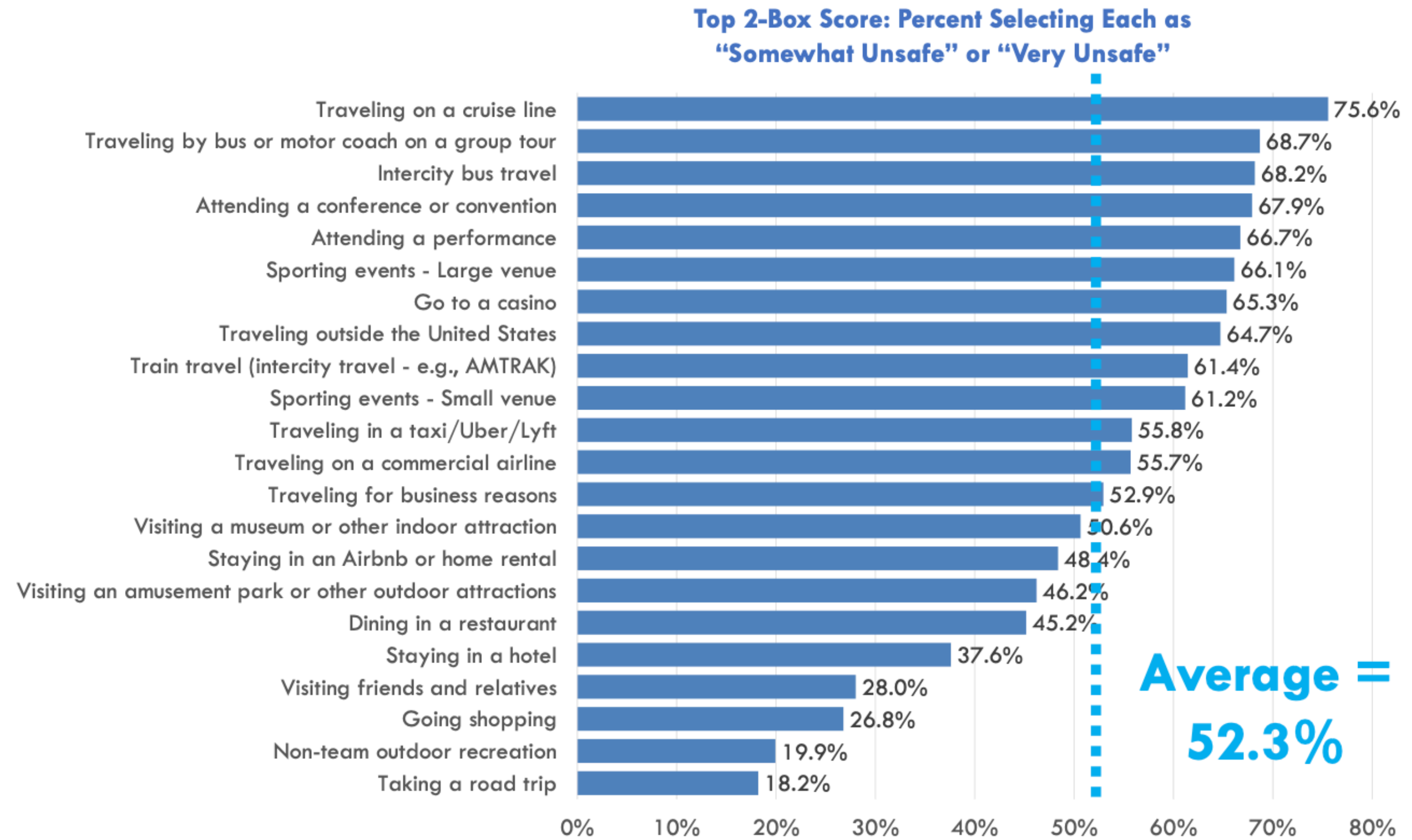


# OVERALL PERCEPTIONS OF TRAVEL'S SAFETY REMAIN AT THE LOWEST LEVELS THEY HAVE BEEN DURING THE PANDEMIC.

## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 28)

**Question: At this moment, how safe would you feel doing each type of travel activity?**

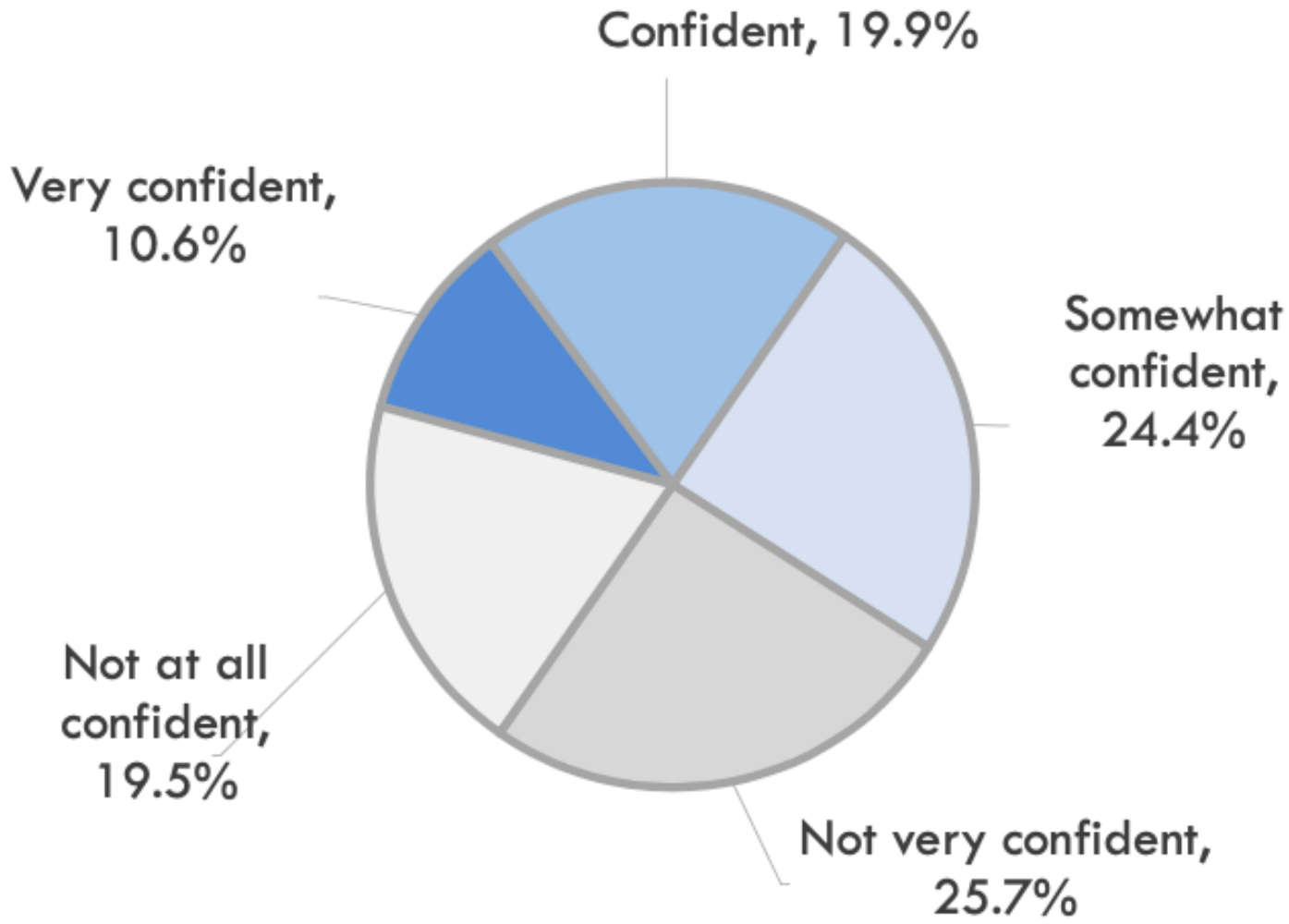
*(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)*



# OVER HALF OF RESPONDENTS CONTINUE TO SAY THEY ARE AT LEAST SOMEWHAT CONFIDENT THEY CAN TRAVEL SAFELY IN THIS ENVIRONMENT.

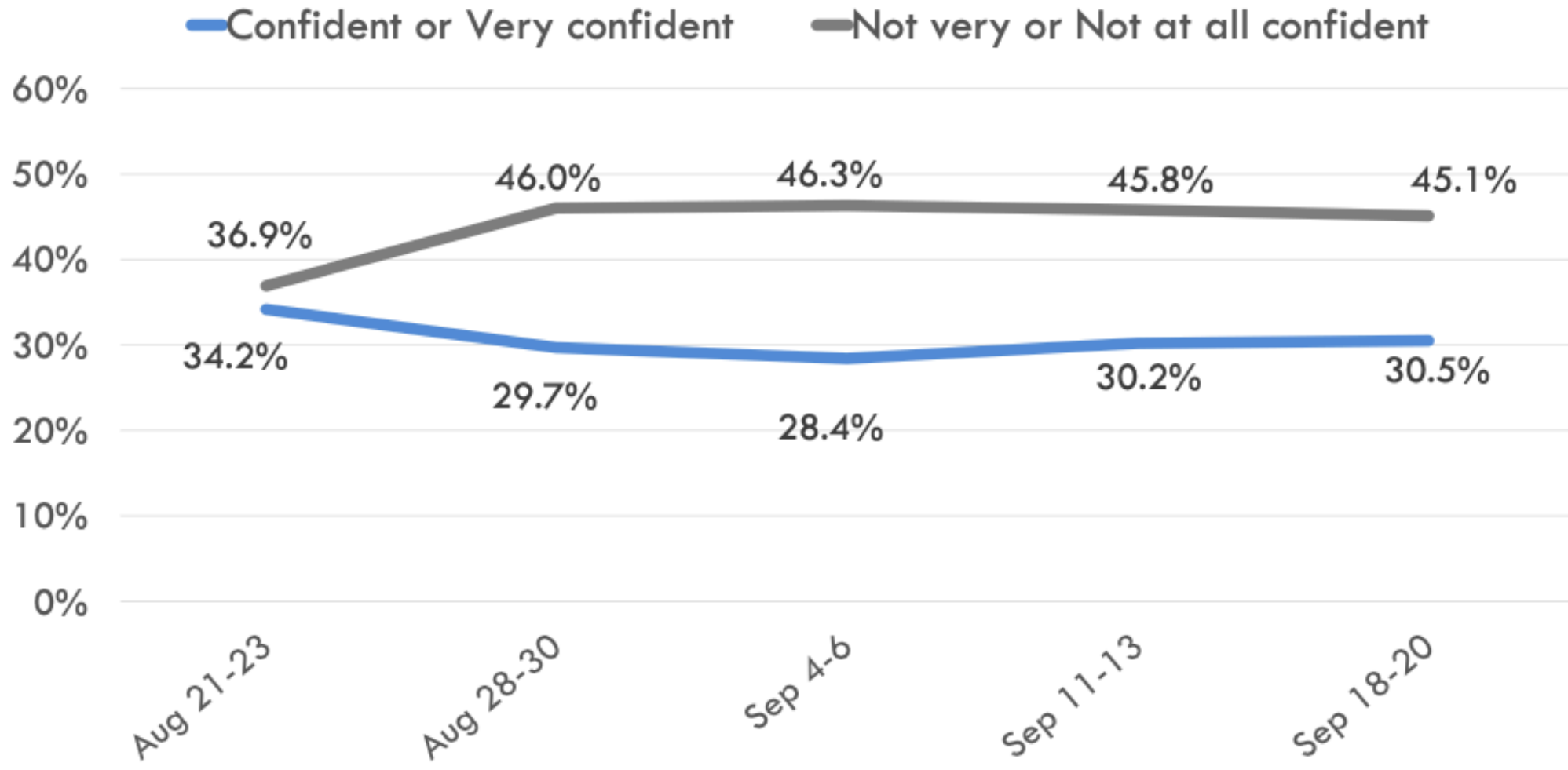
## CONFIDENCE IN TRAVELING SAFELY

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



(Base: Wave 24-28 data. All respondents, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

### Historical data



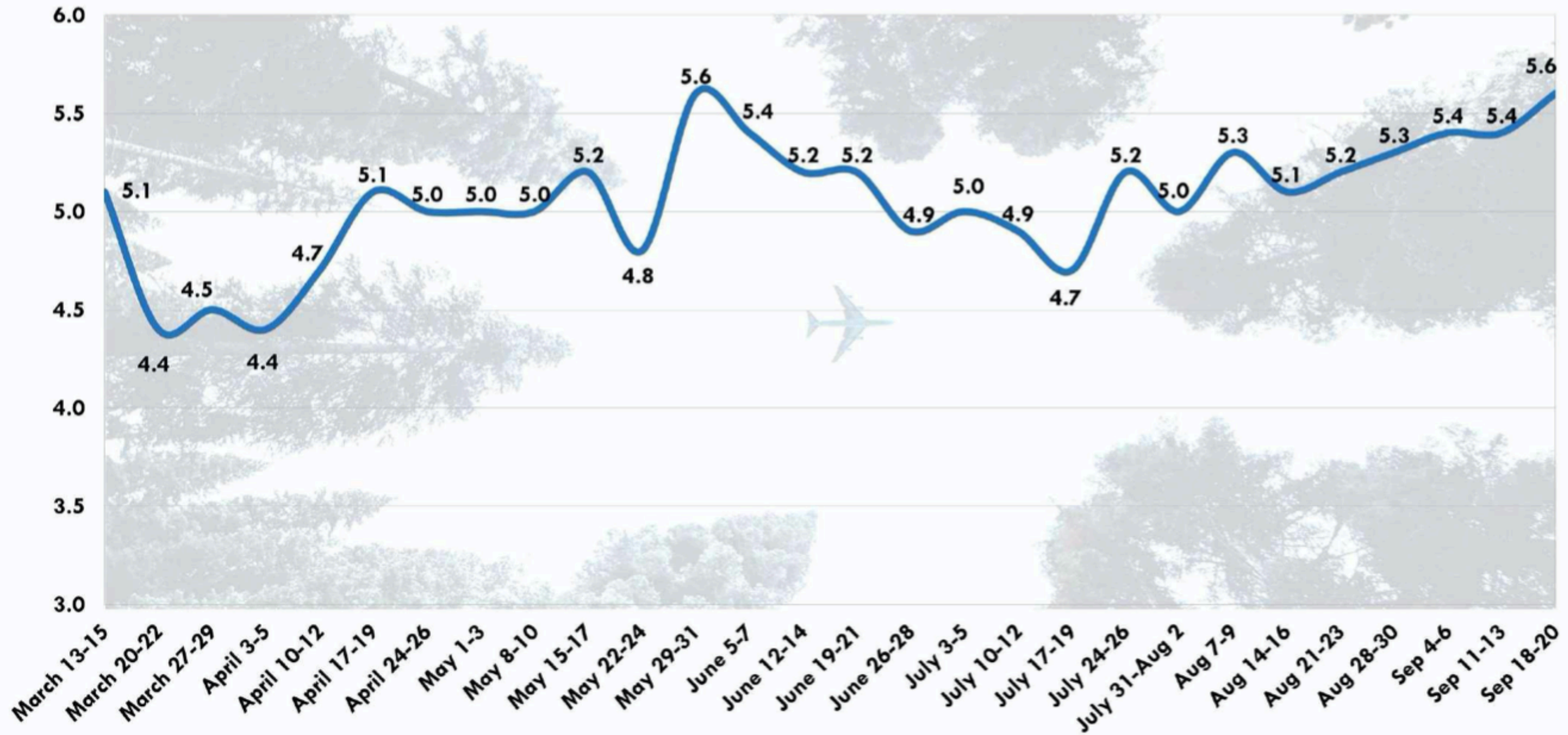
**OPENNESS TO TRAVEL CONTINUES TO BLOOM. THE LEVEL OF EXCITEMENT FOR LEARNING ABOUT NEW TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT IS ONCE AGAIN AT A PANDEMIC-PERIOD HIGH.**

**Question:** At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

*(Base: Waves 1-28. 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 and 1,200 completed surveys.)*

**OPENNESS TO TRAVEL INSPIRATION**  
**MARCH – SEPTEMBER**

 **OPEN TO TRAVEL INSPIRATION** (AVERAGE SCORE ON AN 11-POINT SCALE)





IN APRIL, NEARLY 40% AGREED THEY WOULD CHANGE THE DESTINATIONS THEY TRAVELED TO, NOW LESS THAN 20% AGREE.

**Question:** When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit?

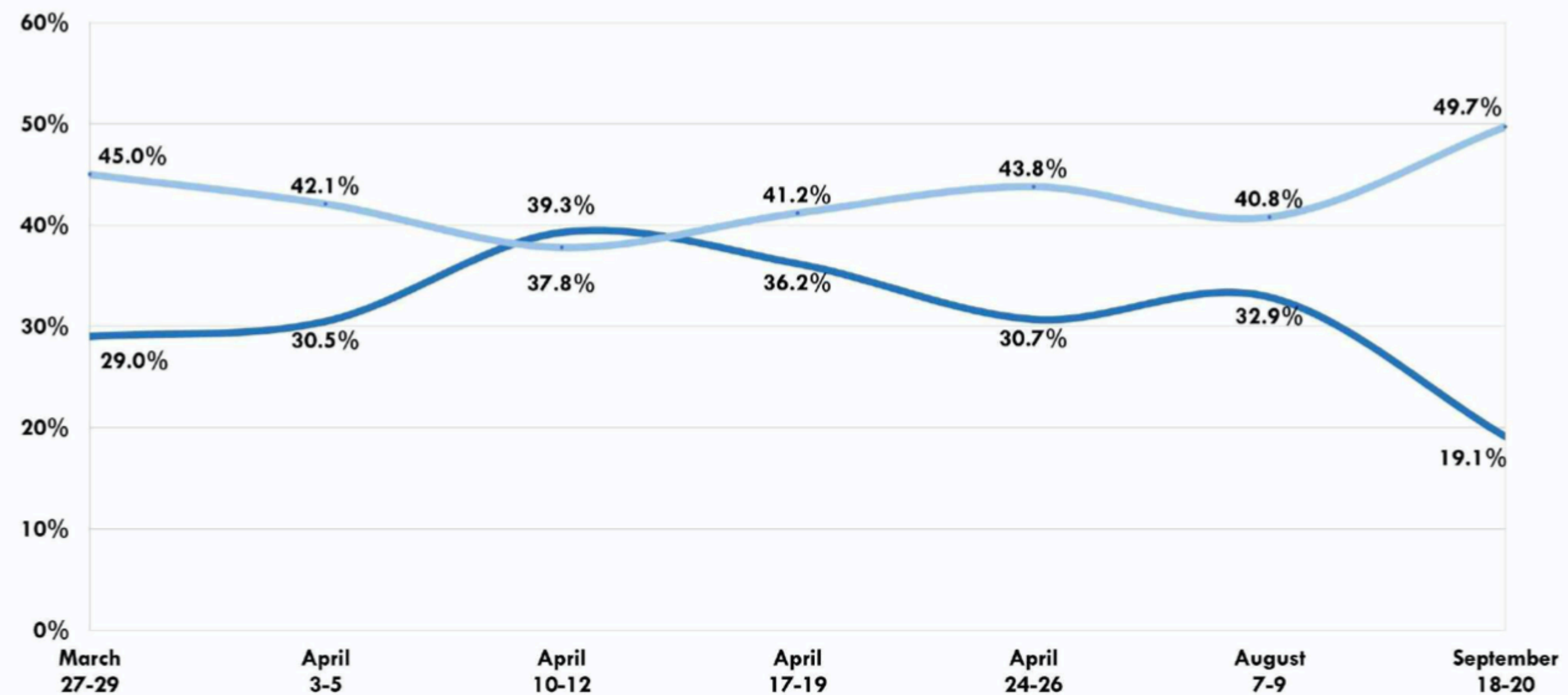
(Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)

(Base: Waves 3-7, 22 and 28 data. All respondents, 1,201, 1,216, 1,263, 1,238, 1,208, 1,201, and 1,200 completed surveys)

## EXPECTATIONS TO CHANGE TRAVEL DESTINATIONS AFTER THE PANDEMIC

YES

NO



THE ROLE OF THE PERSONAL CAR IS MORE THAN TWO TIMES GREATER THAN IT WAS FOR PRE-COVID TRIPS. FOR PLANNED TRIPS THROUGH DECEMBER 2020, 62% OF TRAVELERS WILL GO BY CAR.

## Planned leisure trips



**76%**

Of planned trips are domestic



**62%**

Traveling by car



**2/3**

Traveling under 1000 miles



**53%**

Traveling by plane



**3X Higher**

Likelihood to rent a car for a leisure trip 3X higher than pre-COVID levels

NEARLY HALF OF AMERICAN TRAVELERS FEEL A HIGH DEGREE OF STRESS IN THEIR DAILY LIVES, BUT THE PROPENSITY TO WORRY ABOUT CORONAVIRUS IS DOWN.

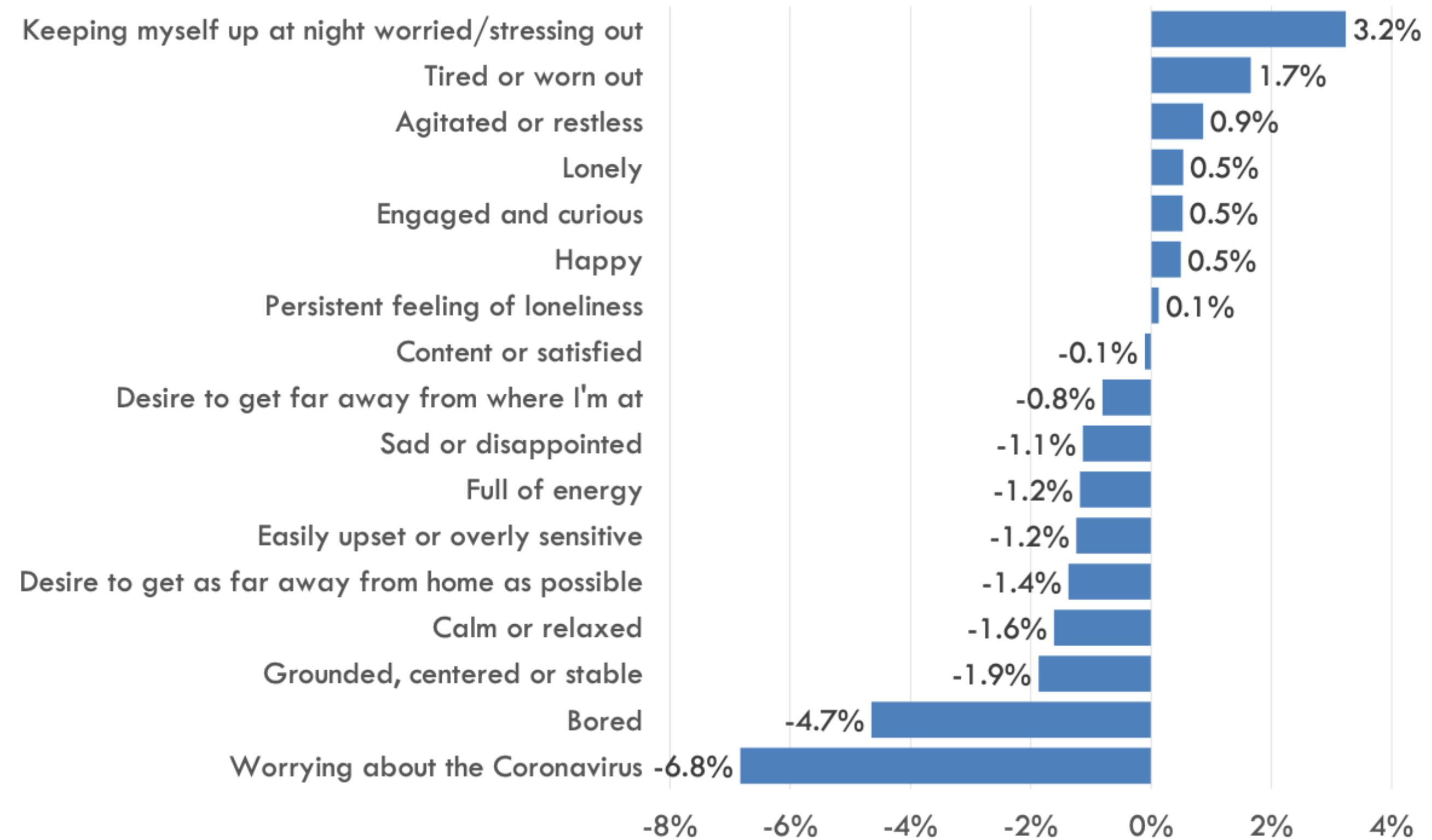
**FEELINGS IN THE PAST MONTH: WHAT'S CHANGING?**

**Question:** Please tell us about how you have been feeling DURING THE LAST MONTH.

Using the scale below, tell us how often you feel each.

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)

**Absolute Change in Past 2 Months**



# KEY TAKEAWAYS

1

Tennessee hotel searches and hotel bookings reported by ADARA continue to rise. Bookings were up week-over-week, but down 51% from the same week last year. The national average for bookings is down 55% from the same week in 2019.

2

Overall perceptions of travel's safety remain at the lowest levels they have been during the pandemic. Over half of American travelers continue to say they are at least somewhat confident they can travel safely in this environment.

3

American travelers' level of excitement for learning about new travel experiences or destinations to visit is at a pandemic-period high—one last (and only other time) obtained at the end of May, at the start of the summer season.

4

Since April, and amidst rising stress, more Americans are reporting stronger prioritization of relaxation, finding joy/happiness, and—especially important for travel—having new experiences.