

The SOUNDTRACK of AMERICA
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TENNESSEE®



TENNESSEE COVID-19 RESEARCH & INSIGHTS

11.16.2020



TRAVEL RESEARCH PARTNERS

IMPACT & FORECASTING



SENTIMENT



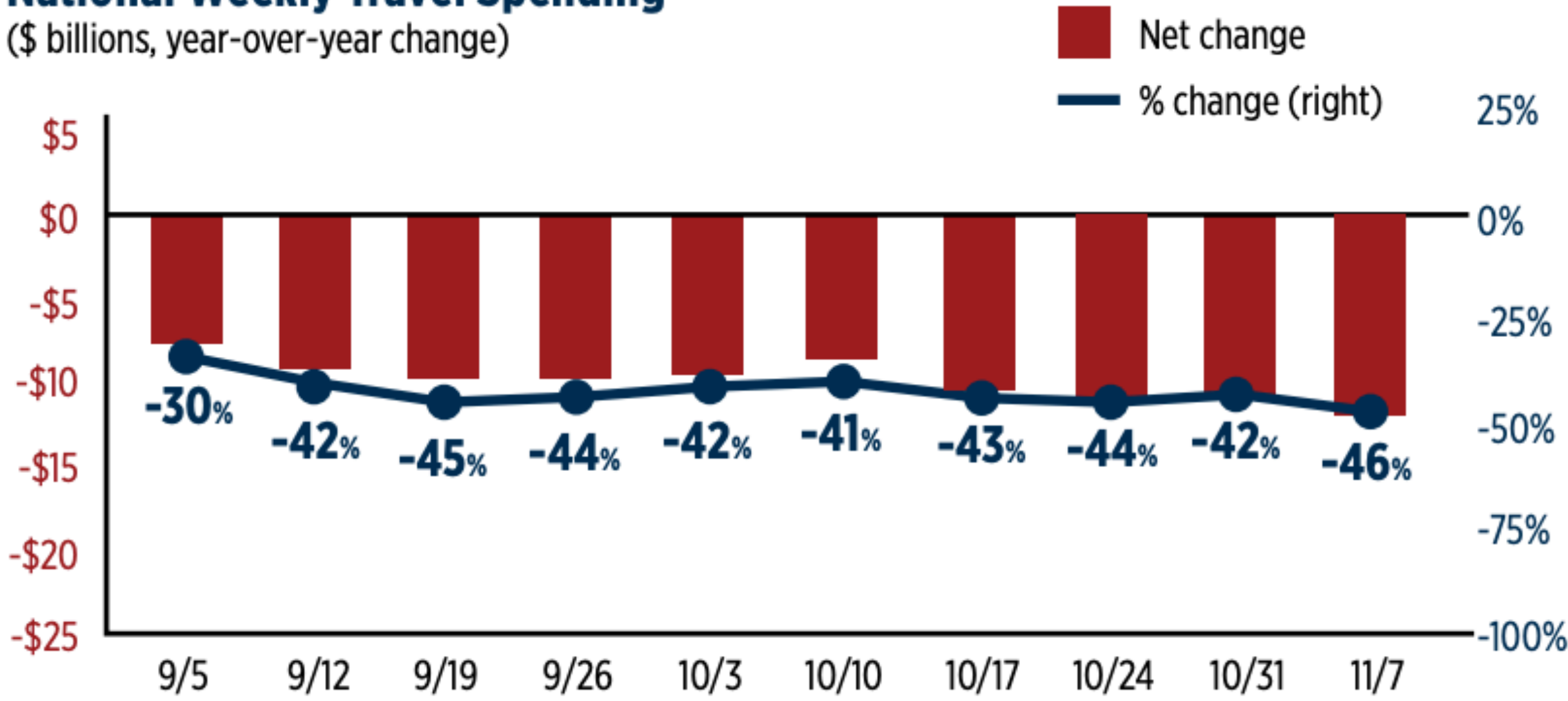
CONSUMER BEHAVIOR



WEEKLY TRAVEL SPENDING - U.S. & TENNESSEE

National Weekly Travel Spending

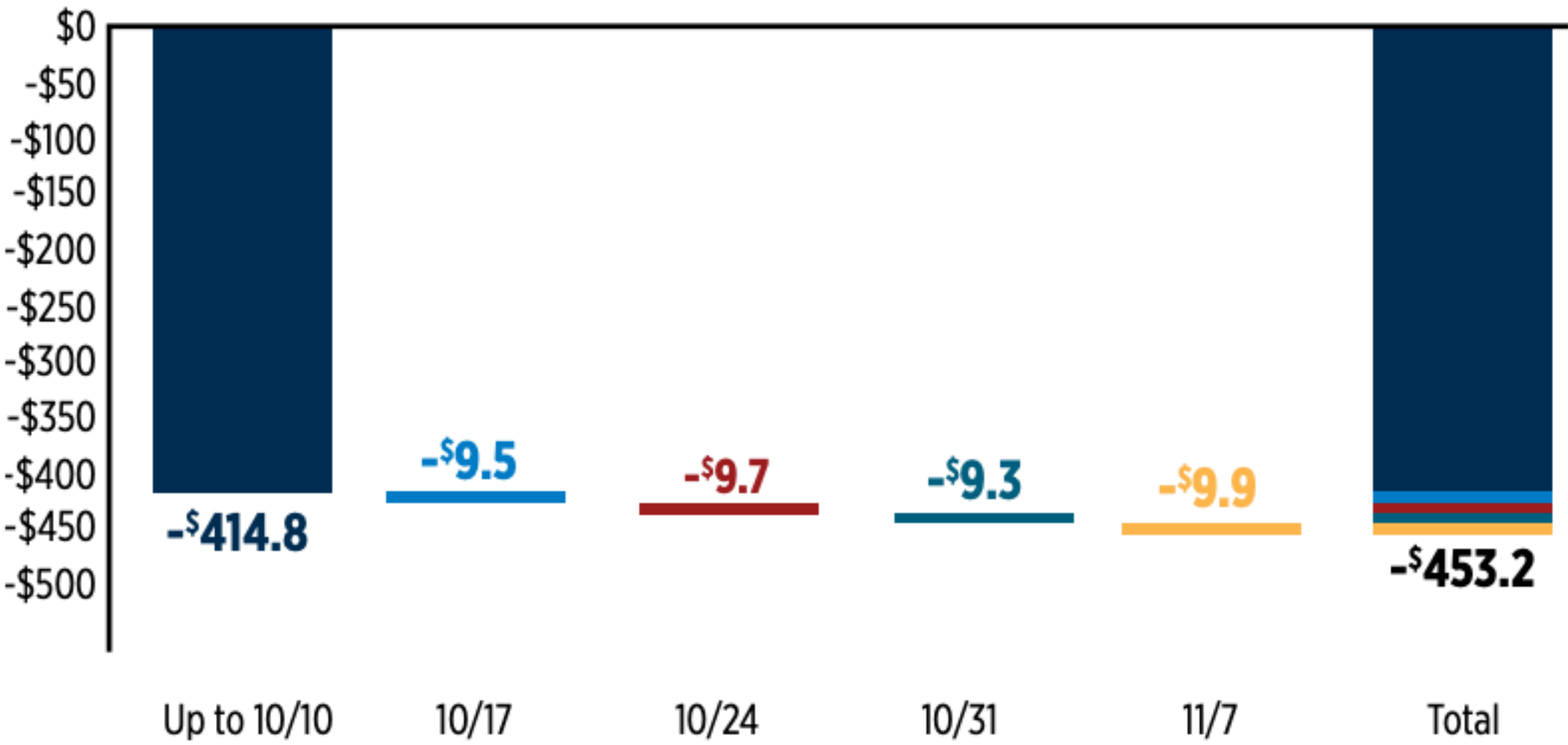
(\$ billions, year-over-year change)



Source: Tourism Economics

Weekly Travel Spending Losses Through November 7th

(\$ billions)

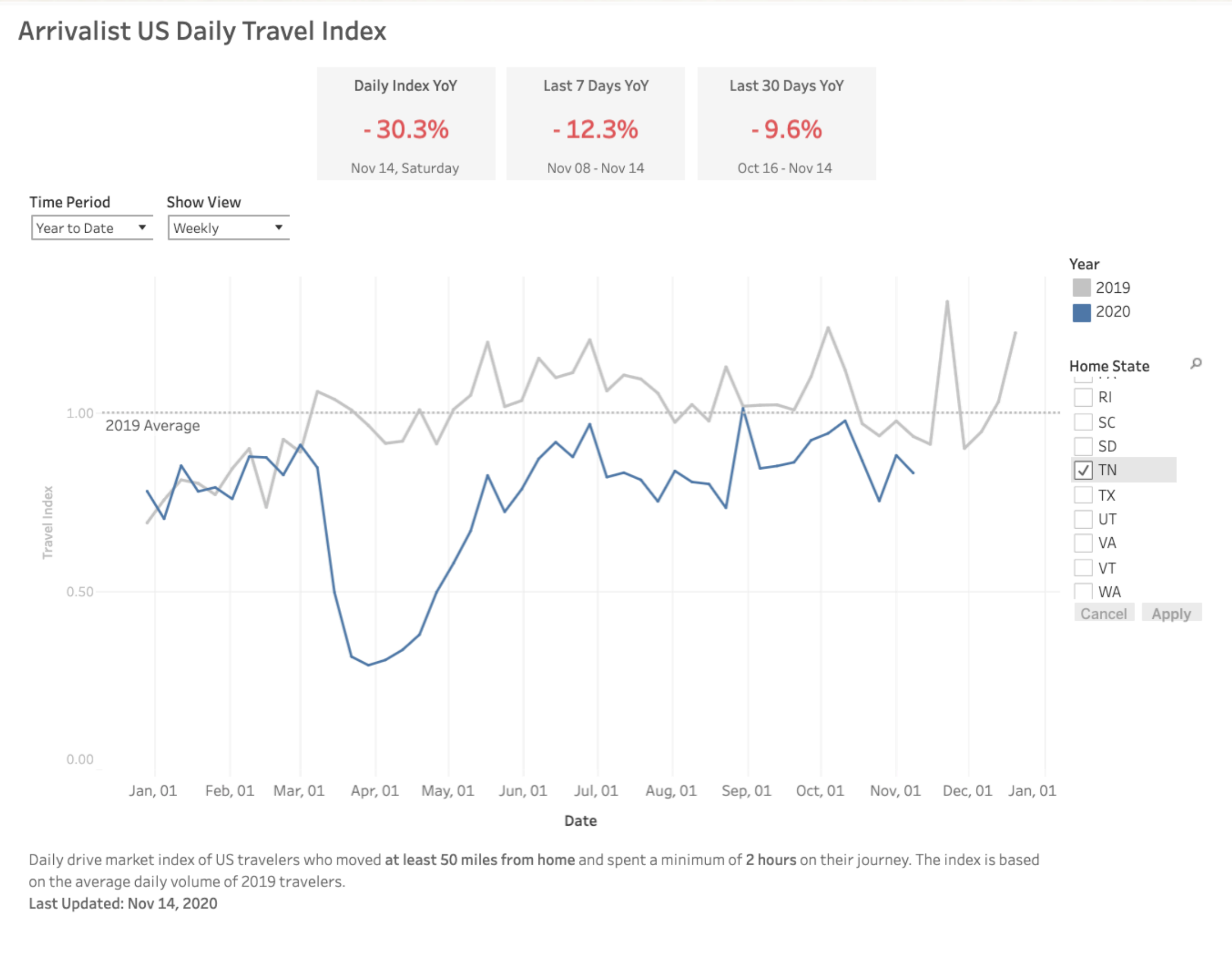


Source: Tourism Economics

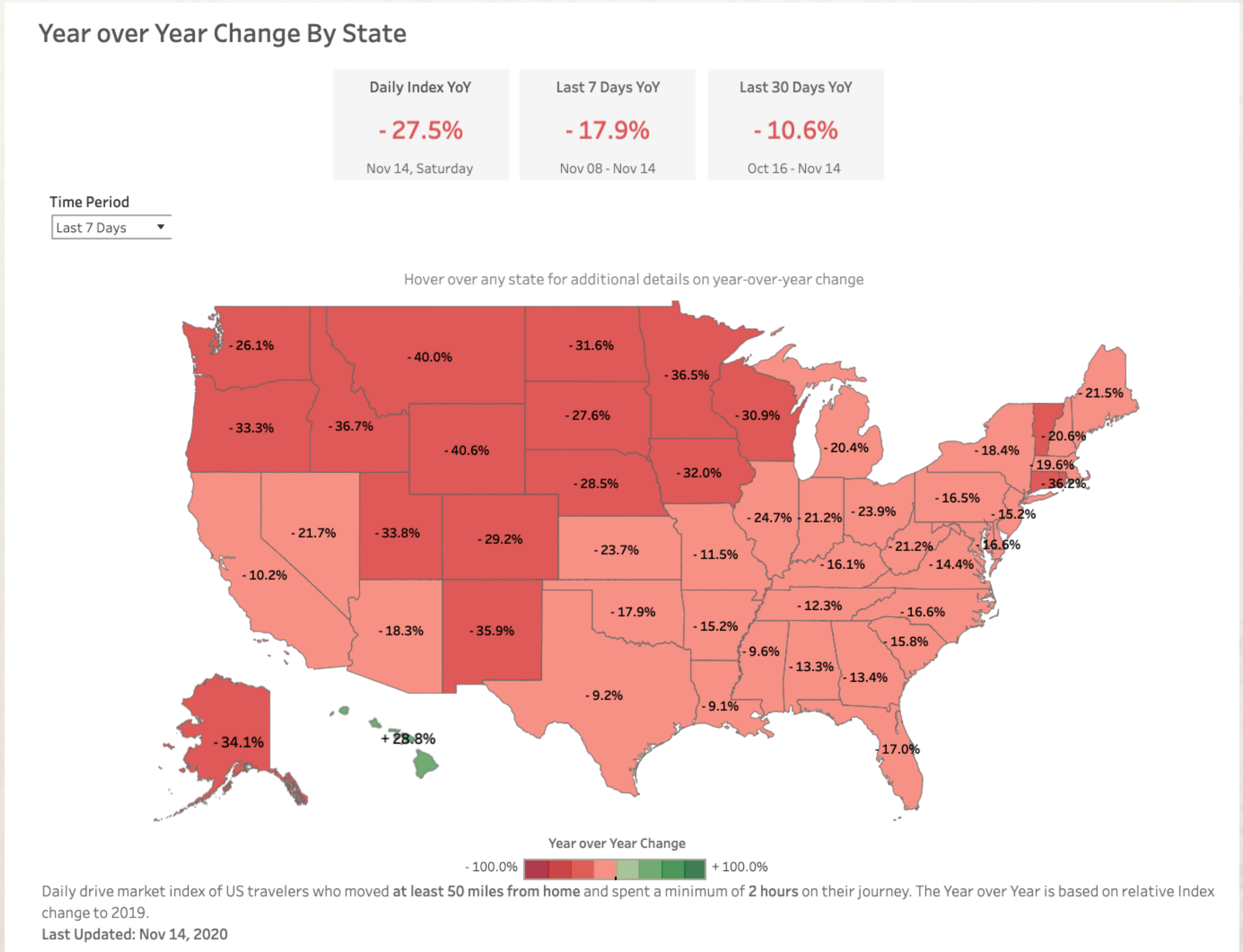
Tennessee Travel Spending

Week Ending	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	26-Sep	3-Oct	10-Oct	17-Oct	24-Oct	31-Oct	7-Nov
Spending (\$ Millions)	270	303	263	261	263	272	279	279	292	257	309	267	277	266	279	285	304	303	291	269
Pecent Change over 2019	-42%	-35%	-43%	-44%	-43%	-40%	-38%	-38%	-36%	-43%	-29%	-39%	-37%	-39%	-36%	-35%	-31%	-31%	-34%	-36%

TENNESSEE HOME STATE WEEKLY TRAVEL INDEX DOWN -12.3% OVER THE PREVIOUS YEAR (11/8-11/14)



Tennessee



U.S.

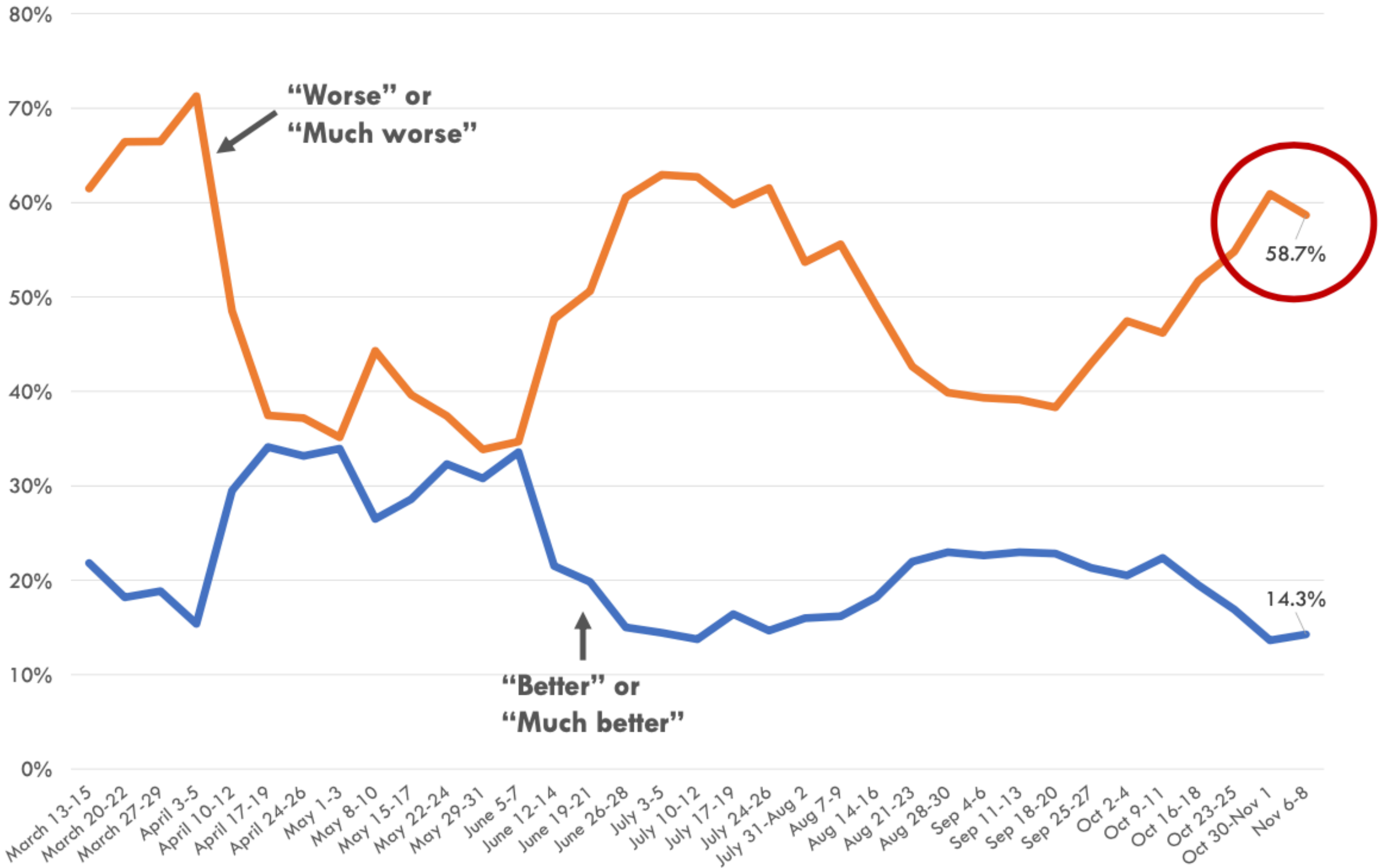
WHILE AMERICANS OVERWHELMINGLY REMAIN IN AN ELEVATED STATE OF ANXIETY, FEWER FEEL THE CORONAVIRUS SITUATION IS GOING TO GET WORSE IN THE NEXT MONTH.

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-35)

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will _____

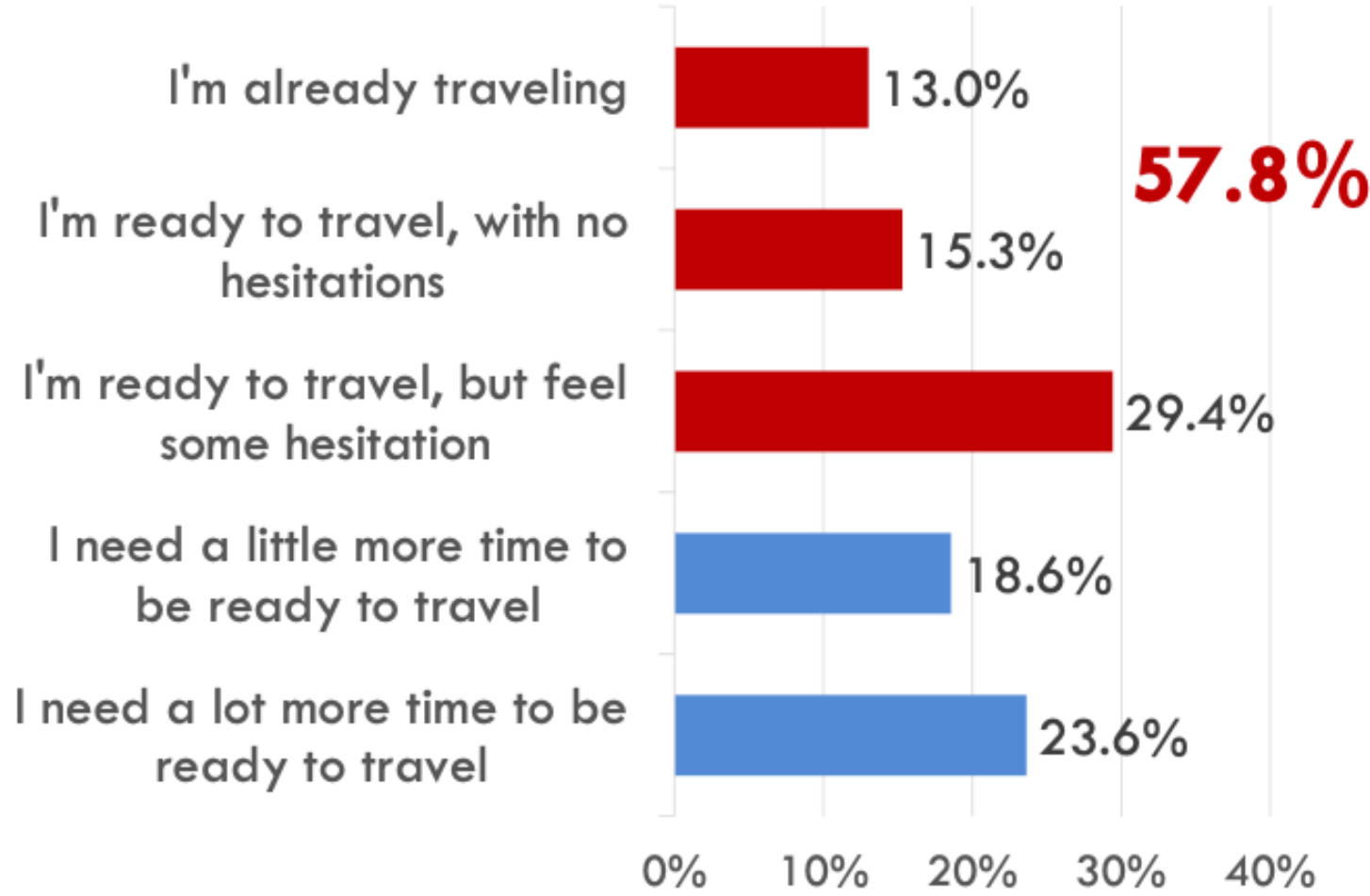
(Base: Waves 1-35. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203 and 1,205 completed surveys.)



NEARLY 6-IN-10 AMERICANS HAVE RETURNED TO A READINESS STATE OF MIND AROUND TRAVEL.

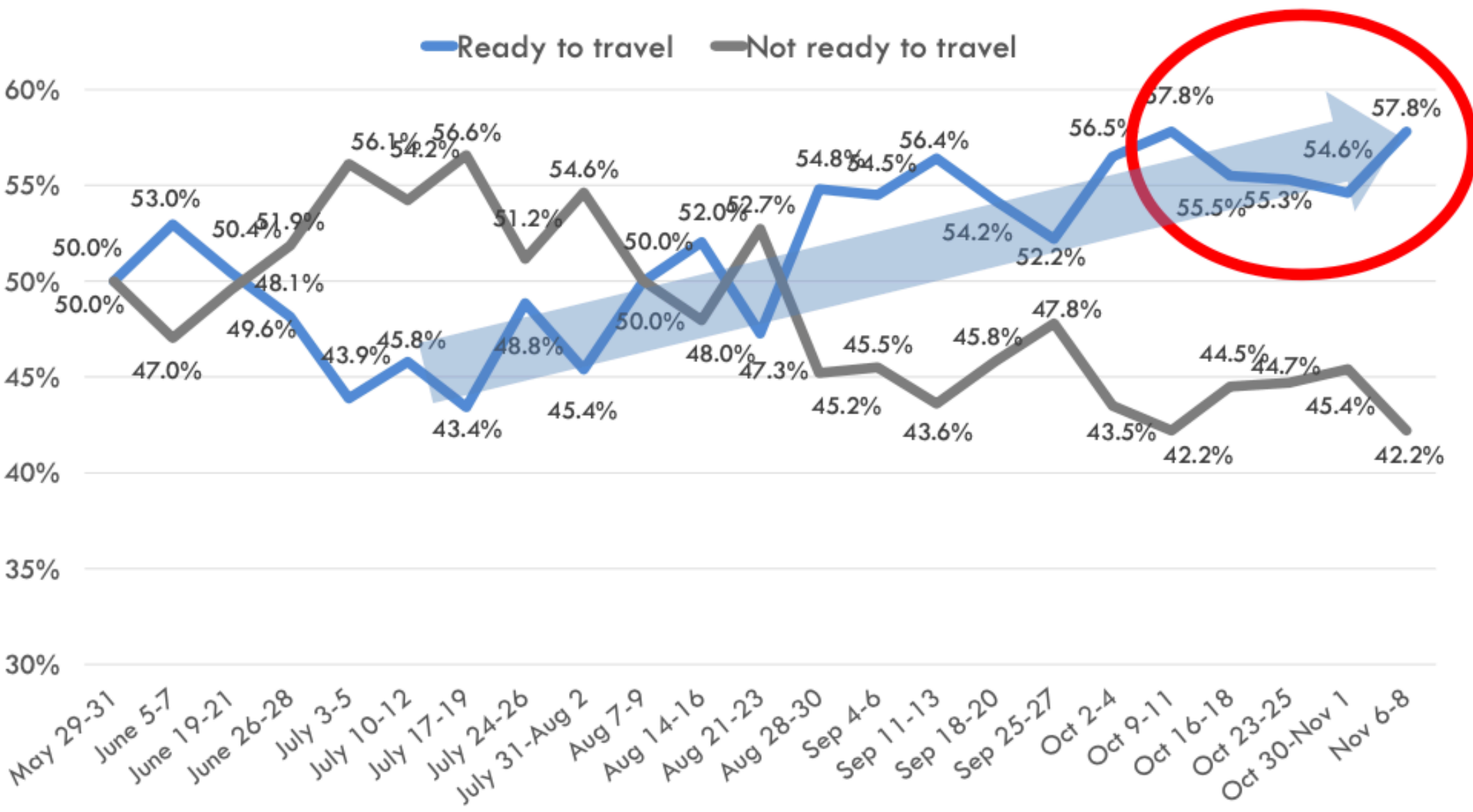
TRAVEL STATE-OF-MIND

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 15-35. 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, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203 and 1,205 completed surveys.)

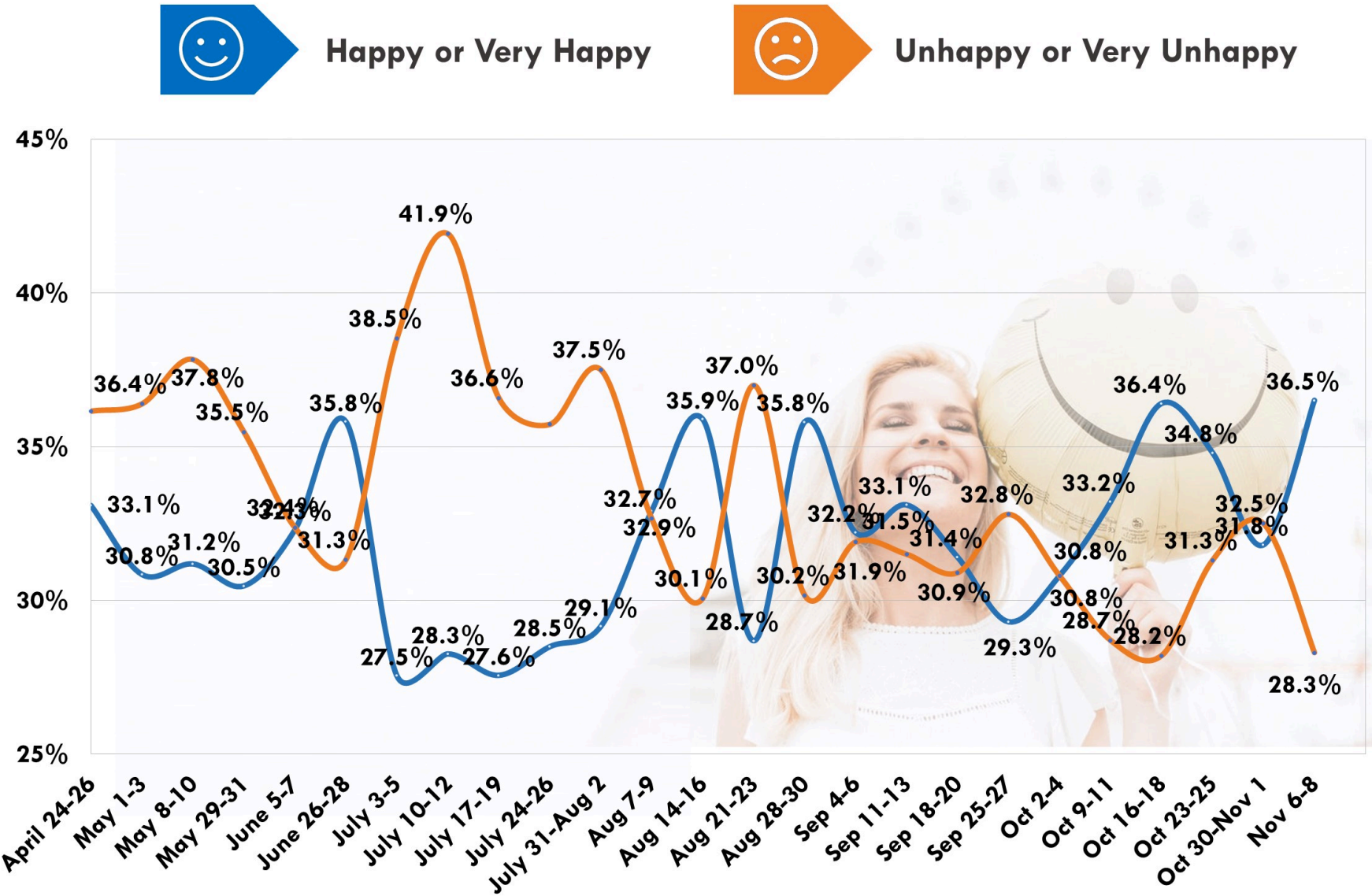
Historical data



OVER A THIRD OF TRAVELERS SAY THEY WOULD BE HAPPY TO SEE AN AD PROMOTING TOURISM TO THEIR COMMUNITY AND ALMOST HALF THINK PEOPLE SHOULD BE WEARING MASKS IN THE ADS.

ADVERTISING TRAVEL IN THE PANDEMIC

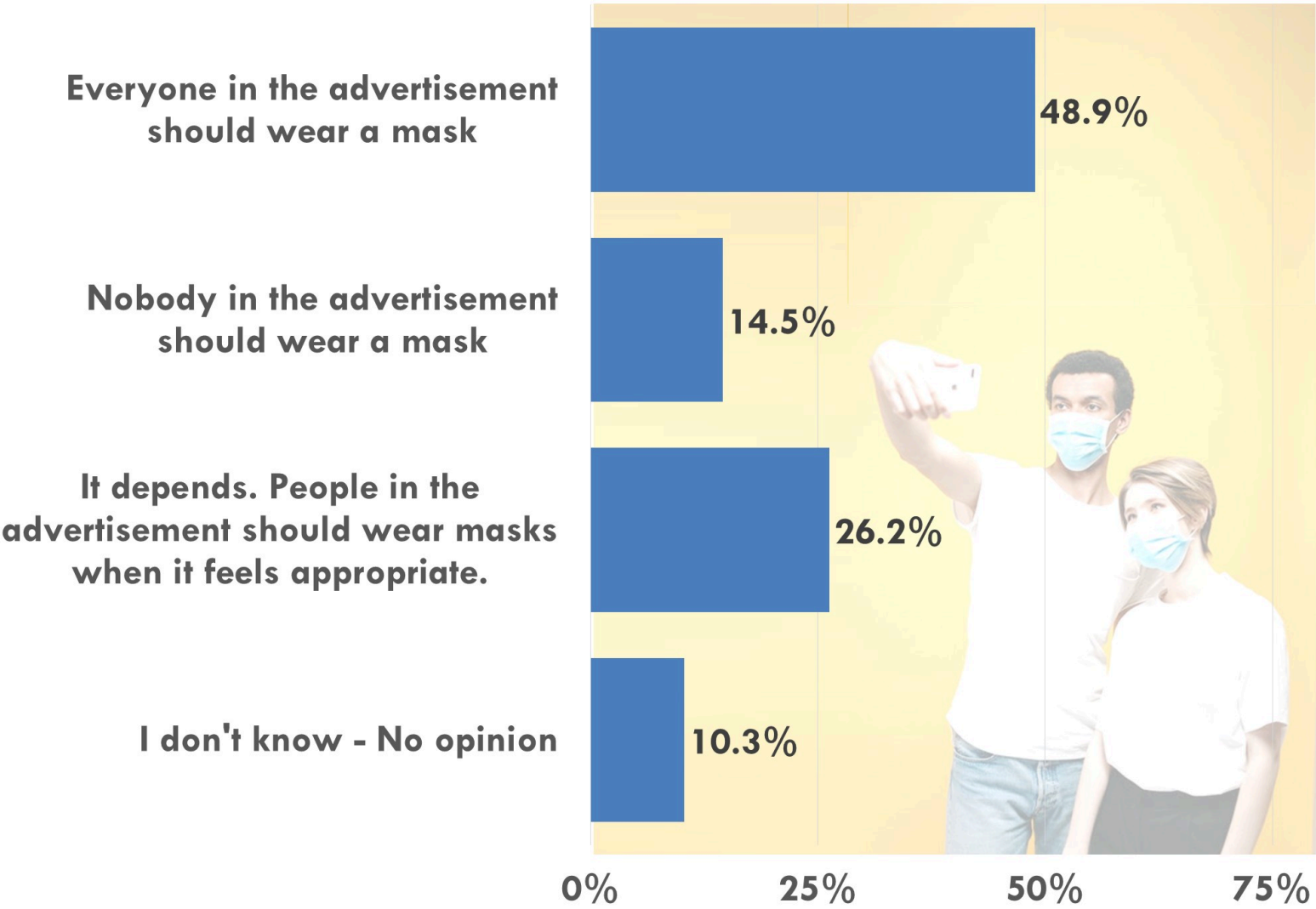
FEELINGS SEEING AN AD PROMOTING TOURISM TO OWN COMMUNITY OF RESIDENCE APRIL – NOVEMBER



QUESTION: HOW WOULD YOU FEEL IF YOU SAW AN ADVERTISEMENT TODAY PROMOTING YOUR COMMUNITY AS A PLACE FOR TOURISTS TO COME VISIT WHEN IT IS SAFE?

(Base: Waves 7-9, 12-13 and 16-35. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203 and 1,205 completed surveys.)

AMERICAN TRAVELERS ADVICE ABOUT MASKS IN ADS AS OF NOVEMBER 8TH



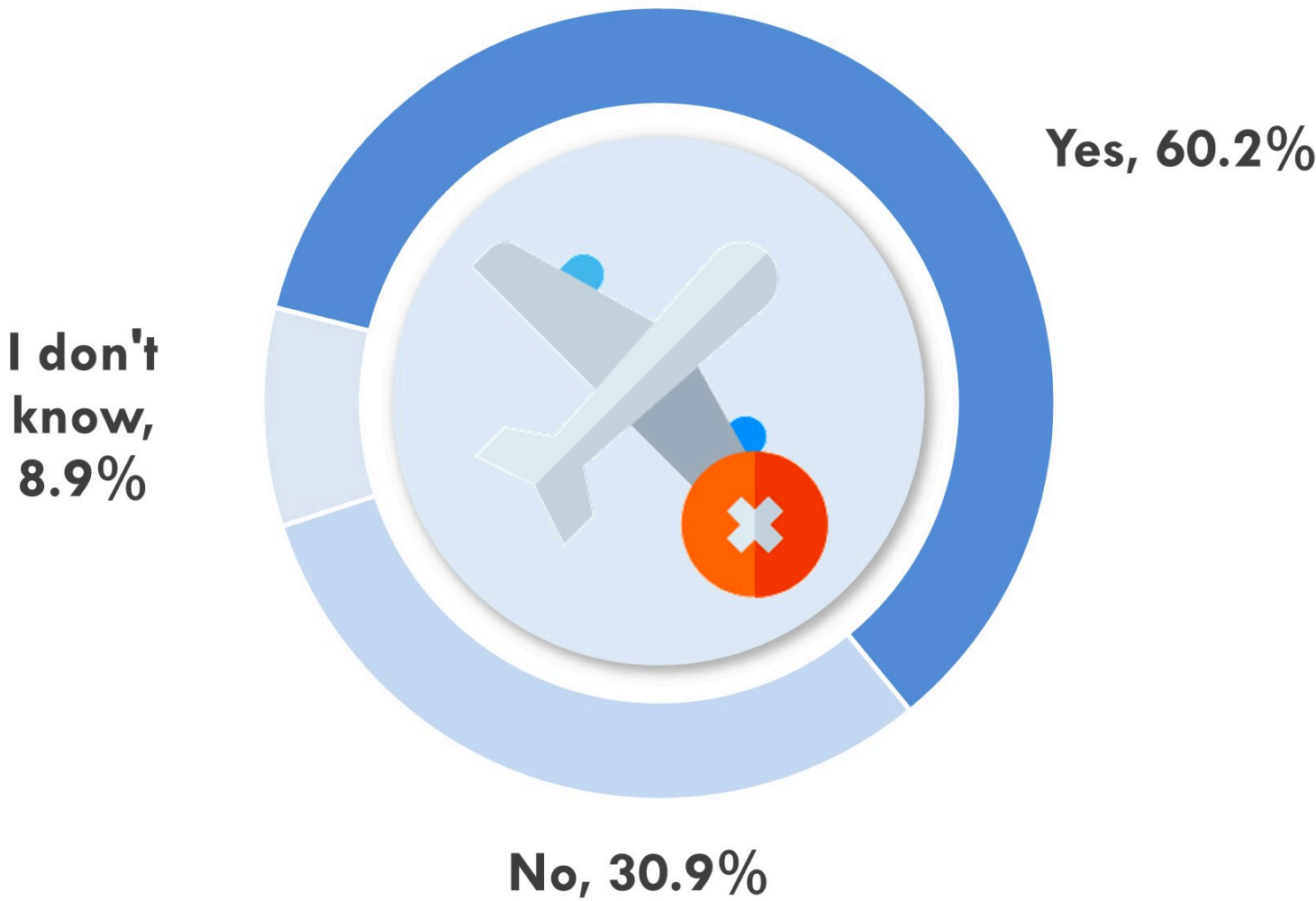
QUESTION: SUPPOSE YOU WERE GIVING ADVICE TO AN ADVERTISING AGENCY REGARDING THE USE OF MASKS IN ONE OF ITS TRAVEL ADVERTISEMENTS. WHICH BEST DESCRIBES THE ADVICE YOU WOULD GIVE? (SELECT ONE)

(Base: Wave 35. All respondents, 1,205 completed surveys.)

NOW 60.2% SAY THAT THE RECENT INCREASES IN COVID-19 CASES AROUND THE COUNTRY HAVE MADE THEM LESS LIKELY TO TRAVEL IN THE NEXT THREE MONTHS.

EFFECTS OF RECENT CORONAVIRUS SURGES
AS OF NOVEMBER 8TH

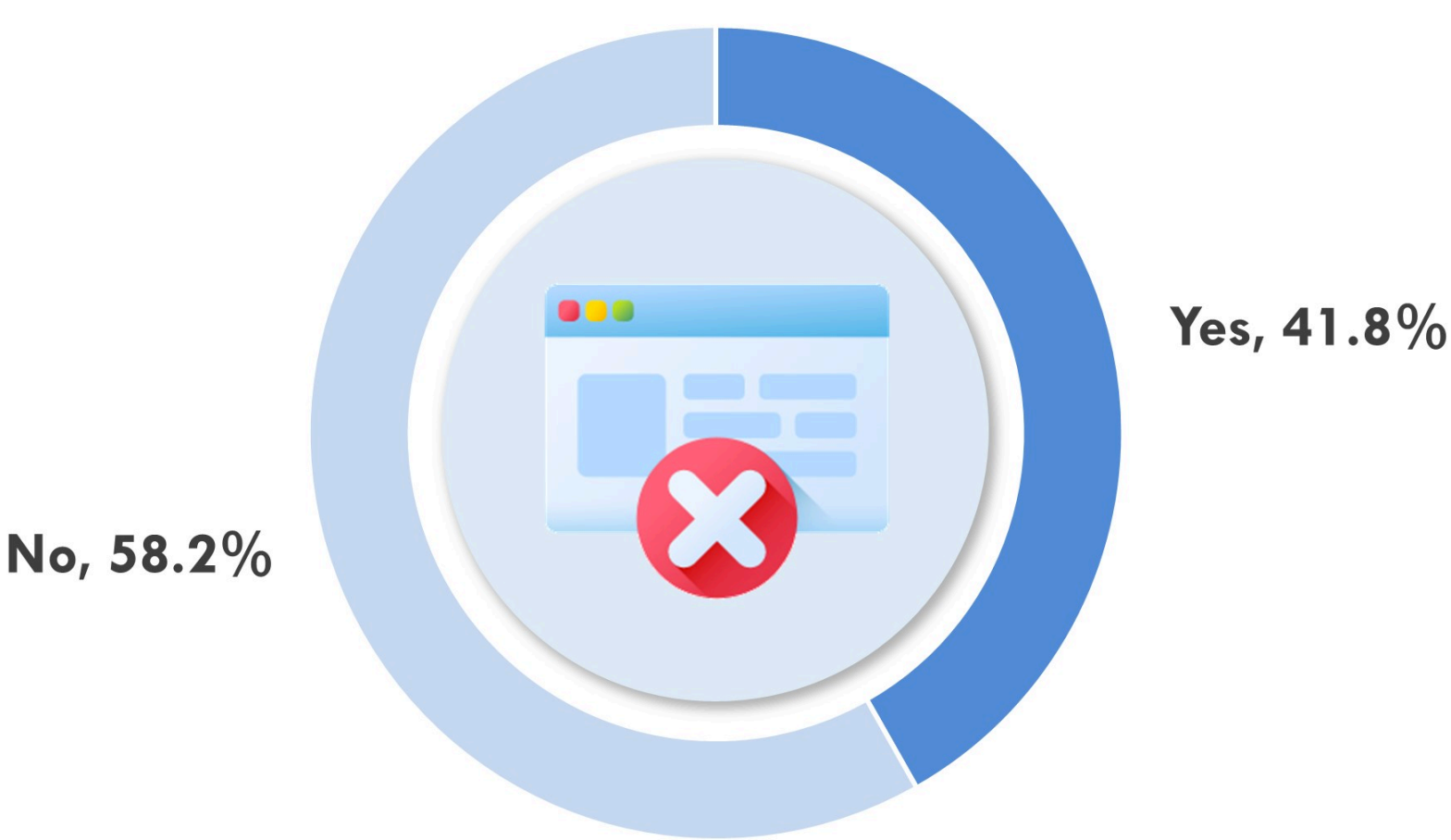
LESS LIKELY TO TRAVEL IN
NEXT THREE MONTHS



QUESTION: HAVE RECENT INCREASES IN COVID-19 CASES AROUND THE COUNTRY MADE YOU LESS LIKELY TO TRAVEL IN THE NEXT THREE (3) MONTHS?

(Base: Wave 35 data. All respondents, 1,200 completed surveys. Data collected Nov 6-8, 2020)

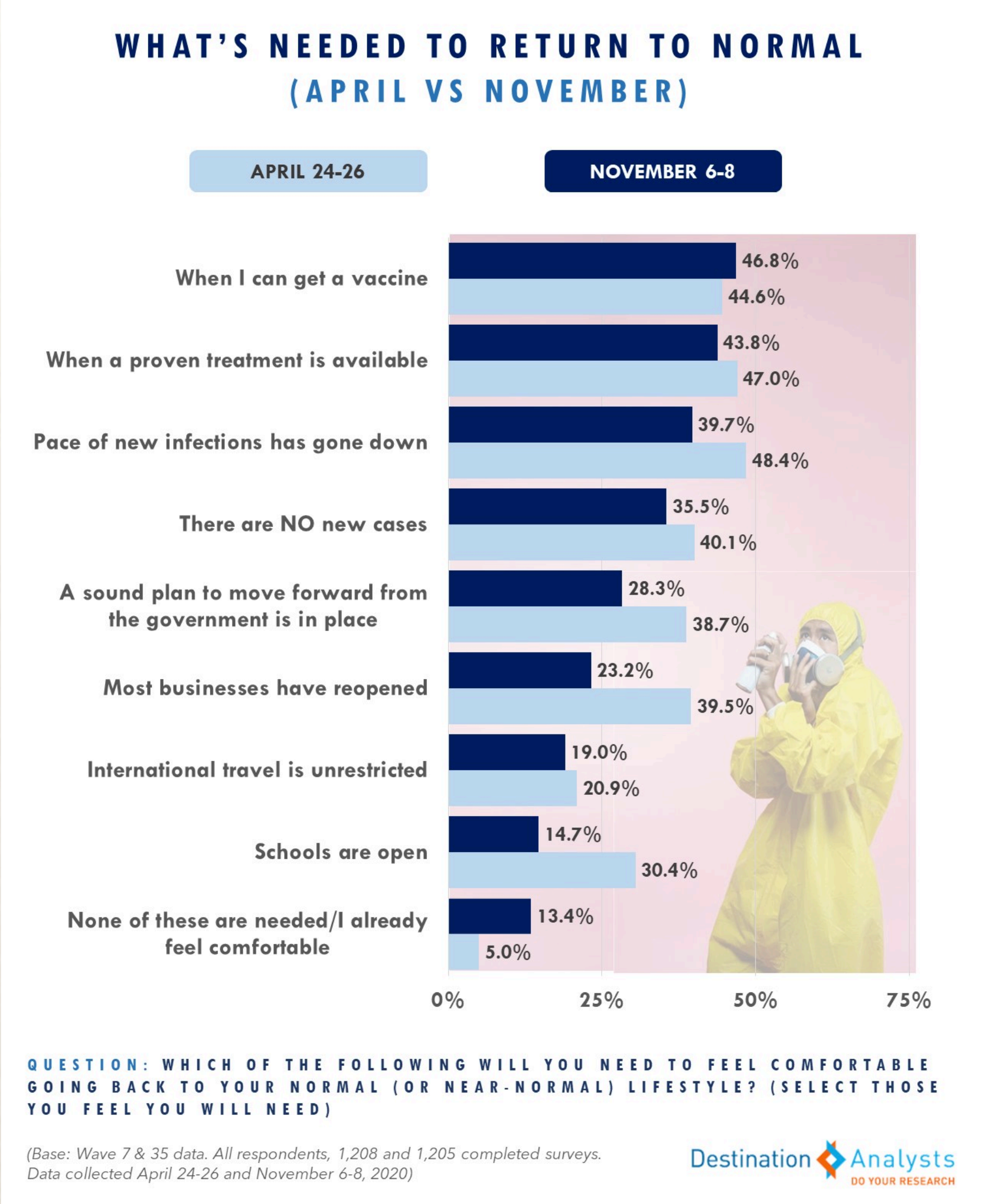
CANCELLED OR POSTPONED TRIPS
BECAUSE OF RECENT SURGE



QUESTION: HAVE YOU CANCELLED OR POSTPONED ANY UPCOMING LEISURE TRIPS BECAUSE OF THE RECENT INCREASES IN COVID-19 CASES SEEN AROUND THE UNITED STATES?

(Base: Wave 35 data. All respondents, 1,205 completed surveys. Data collected Nov 6-8, 2020)

NOTABLY FEWER AMERICANS NEED A NUMBER OF CIRCUMSTANCES TO BE IN PLACE TO RETURN TO NORMAL COMPARED TO THE FIRST PHASE OF THE PANDEMIC IN APRIL.



IN ORDER TO ATTEND A FESTIVAL OR EVENT, AMERICANS WANT MASKS REQUIRED, FREQUENT CLEANING, AND LIMITED NUMBER OF ATTENDEES ALLOWED.



AAA ANTICIPATES THANKSGIVING AIR TRAVEL VOLUME WILL BE DOWN BY NEARLY HALF OF PRIOR YEARS – TO 2.4 MILLION TRAVELERS. THIS WOULD BE THE LARGEST ONE-YEAR DECREASE EVER.

2020 Thanksgiving Holiday Travelers			
	Automobile	Air	Other (Bus, Train, Cruise)
2020	47.8M	2.4M	353,000
2019	49.9M	4.58M	1.5M
Change	-4.3%	-47.5%	-76.2%

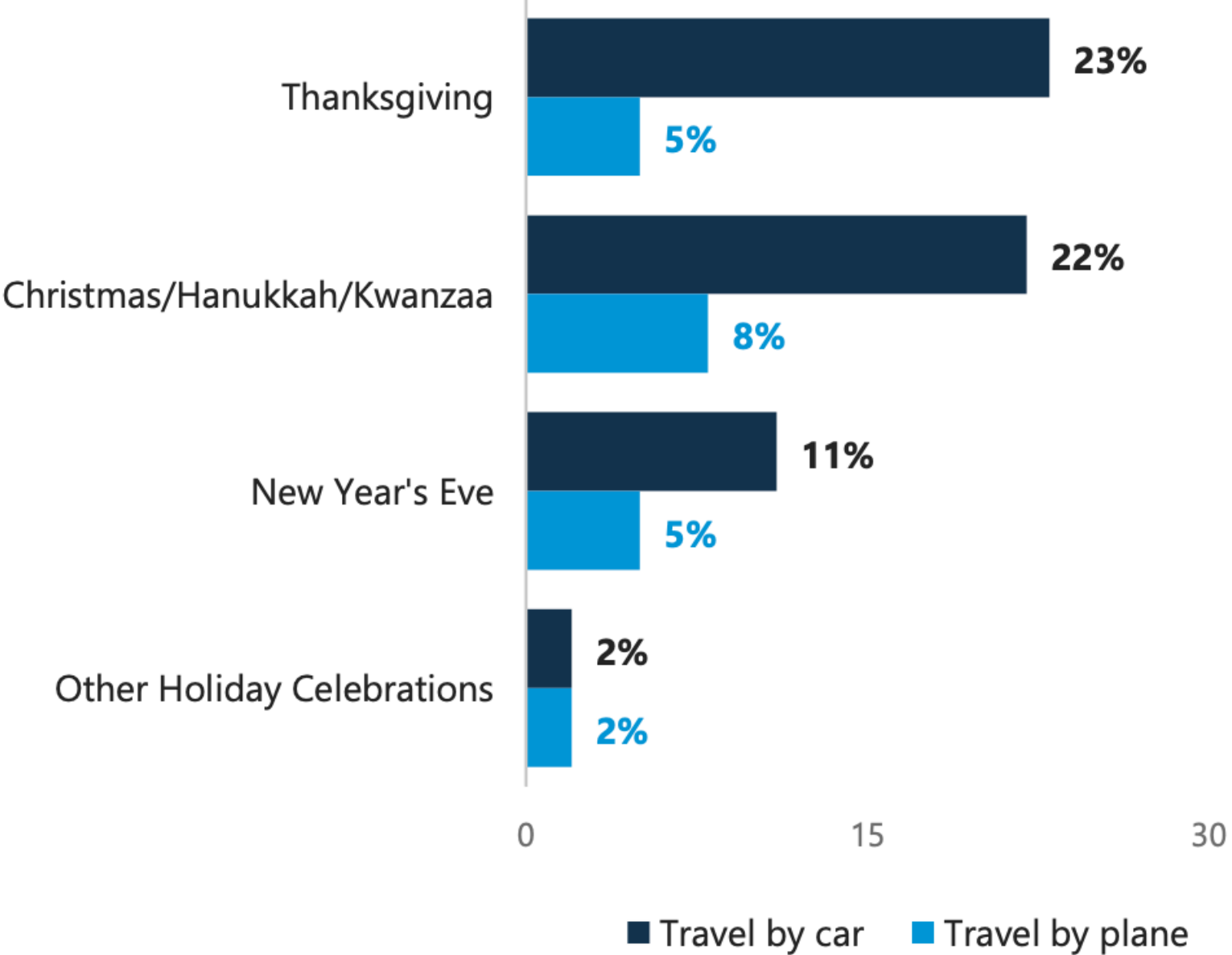
FEWER AMERICAN TRAVELERS PLAN TO TAKE A TRIP DURING THE HOLIDAYS - 53% ARE NOT PLANNING ANY TRAVEL DURING THE HOLIDAY SEASON, UP FROM 48% A MONTH AGO.

UPCOMING HOLIDAY TRAVEL PLANS*


53%
are not planning to take a trip this holiday season


38%
will travel by car


17%
will travel by plane



**Involving traveling at least 50 miles from home*

Travel Sentiment Study Wave 24

Base: All travelers

KEY TAKEAWAYS

1

While Americans overwhelmingly remain in an elevated state of anxiety, they may be feeling slightly more hopeful. This week, somewhat fewer feel the coronavirus situation is going to get worse in the next month (58.7% down from 60.9%).

2

Over half of Americans have returned to a travel readiness state of mind. Excitement for a potential getaway (50%) and openness (46%) to travel inspiration improved, as did the ability of discounts and price cuts to improve interest in travel within the next three months (39%).

3

With their desire for travel inspiration returning, 37% of American travelers now say they would be happy to see an ad promoting tourism to the place where they live. When asked how they would advise advertising agencies about the use of masks in travel advertisements, **nearly half said everyone in the ad should wear a mask.**

4

50 million Americans are expected to travel this Thanksgiving—a 10% drop from 2019 and the largest one-year decrease since the Great Recession in 2008. According to Longwoods, 53% of Americans are not planning to travel this holiday season, up from 48% a month ago.