

The SOUNDTRACK of AMERICA
MADE IN
TENNESSEE®



TENNESSEE COVID-19 RESEARCH & INSIGHTS

11.30.2020



TRAVEL RESEARCH PARTNERS

IMPACT & FORECASTING



SENTIMENT



CONSUMER BEHAVIOR

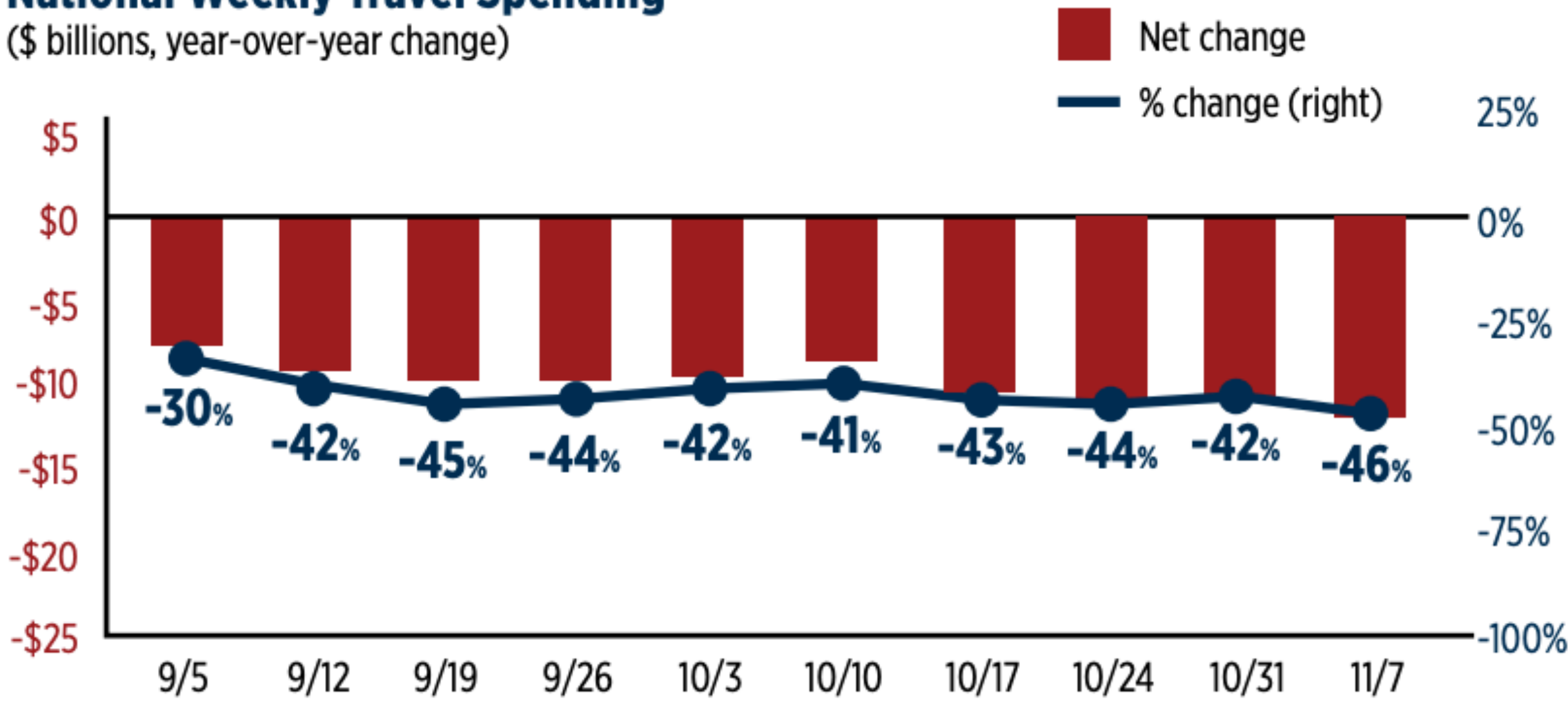


WEEKLY TRAVEL SPENDING - U.S. & TENNESSEE

NOTE: Updated reports have not been posted online since the holiday

National Weekly Travel Spending

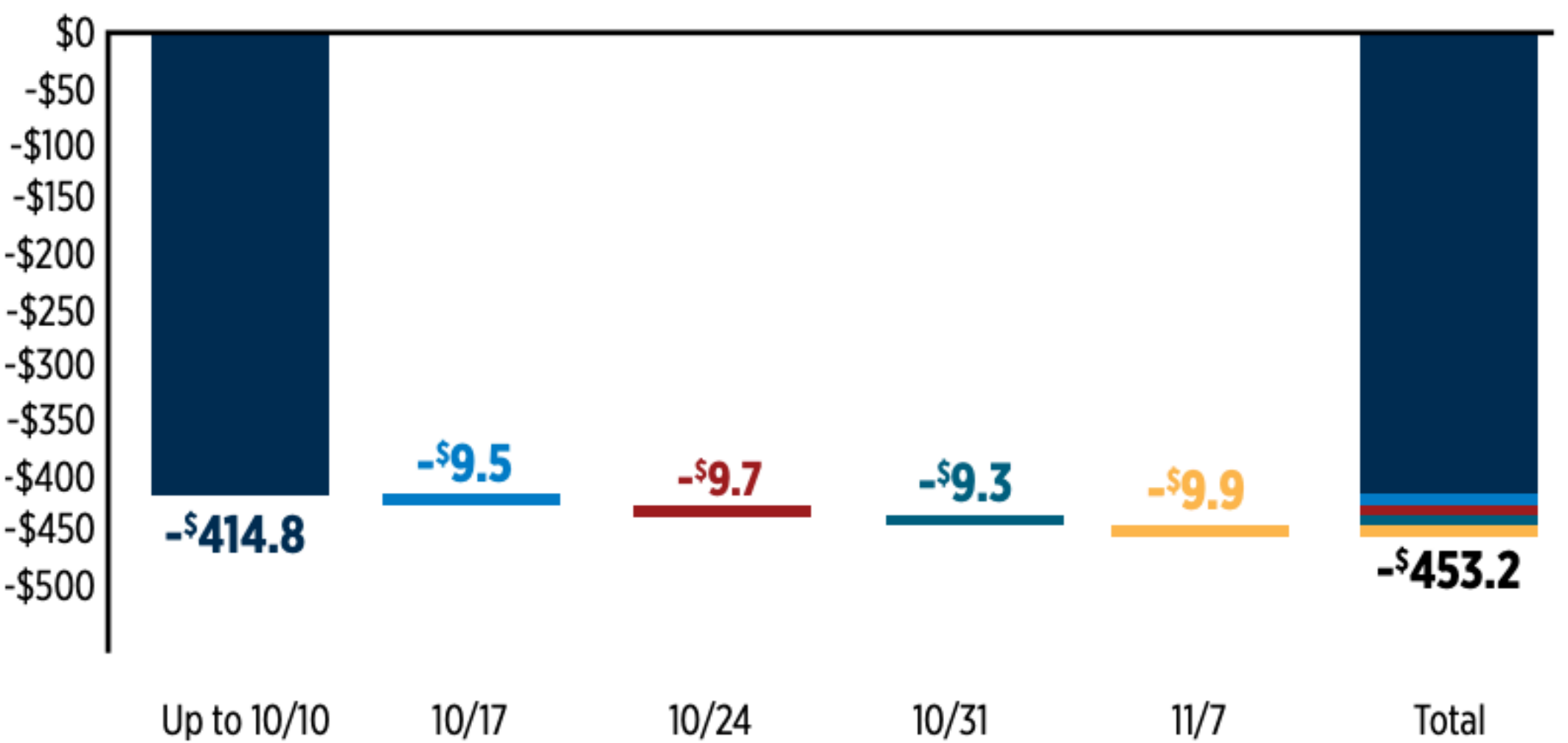
(\$ billions, year-over-year change)



Source: Tourism Economics

Weekly Travel Spending Losses Through November 7th

(\$ billions)



Source: Tourism Economics

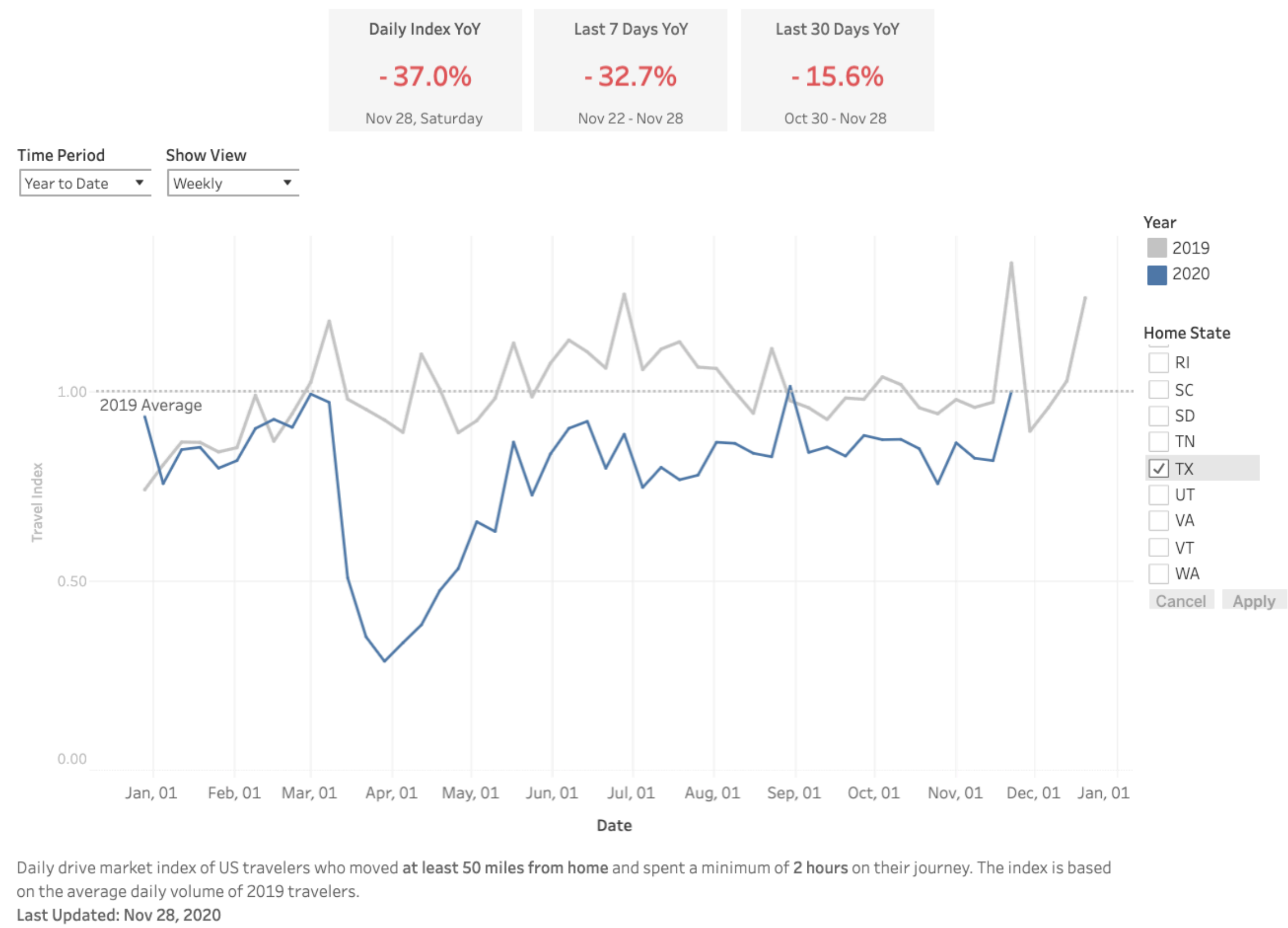
Tennessee Travel Spending

Week Ending	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	14-Nov
Spending (\$ Millions)	303	263	261	263	272	279	279	292	257	309	267	277	266	279	285	304	303	291	269	
Pecent Change over 2019	-35%	-43%	-44%	-43%	-40%	-38%	-38%	-36%	-43%	-29%	-39%	-37%	-39%	-36%	-35%	-31%	-31%	-34%	-36%	

SOURCE: [U.S. Travel](#)

TENNESSEE HOME STATE WEEKLY TRAVEL INDEX DOWN -32.7% OVER THE PREVIOUS YEAR (11/22-11/28)

Arrivalist US Daily Travel Index



Time Period

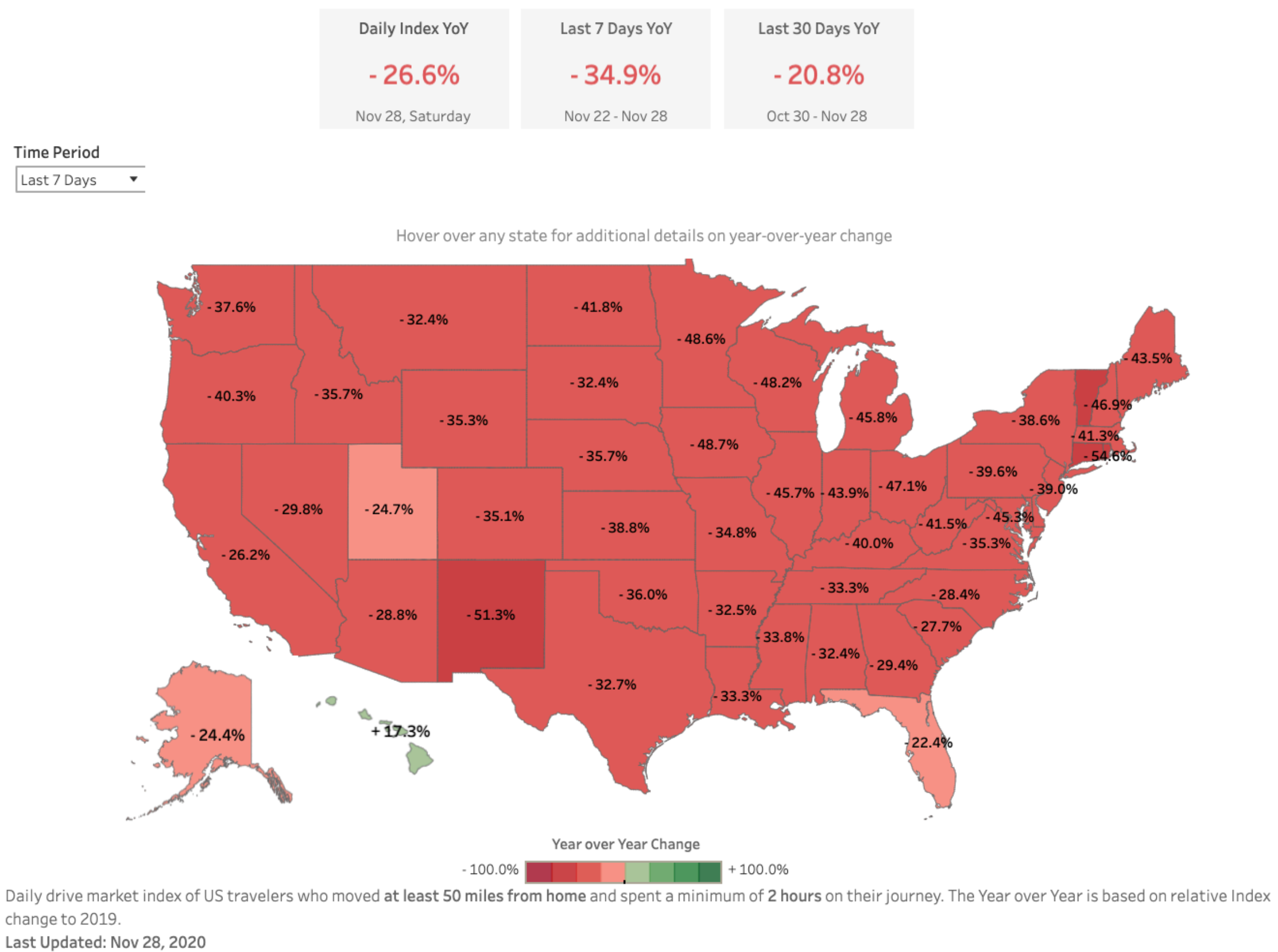
Year to Date

Show View

Weekly

Tennessee

Year over Year Change By State



Time Period

Last 7 Days

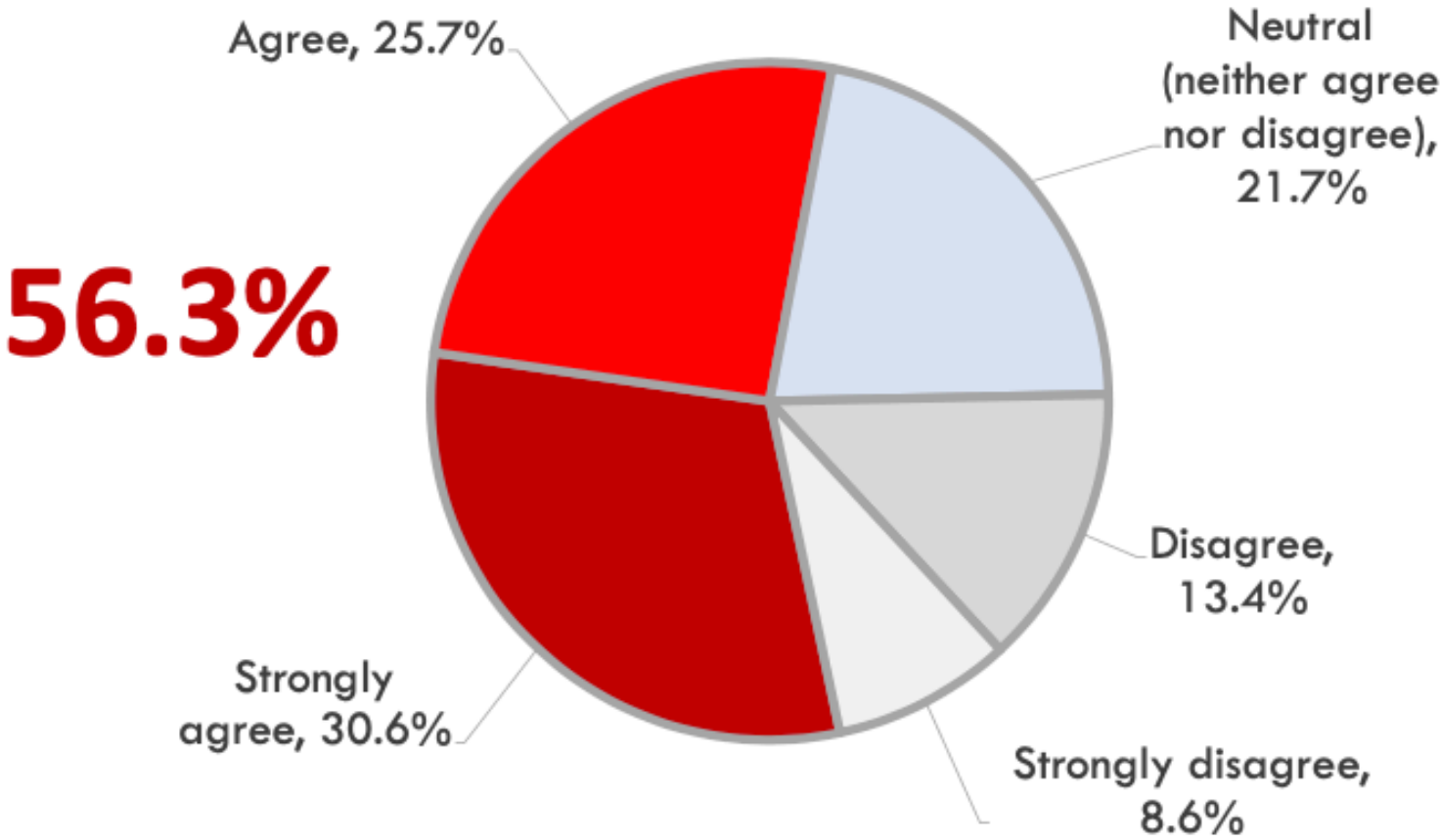
U.S.

MORE THAN HALF SAID THEY ARE PLANNING TO AVOID ALL TRAVEL UNTIL THE CORONAVIRUS SITUATION BLOWS OVER

AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

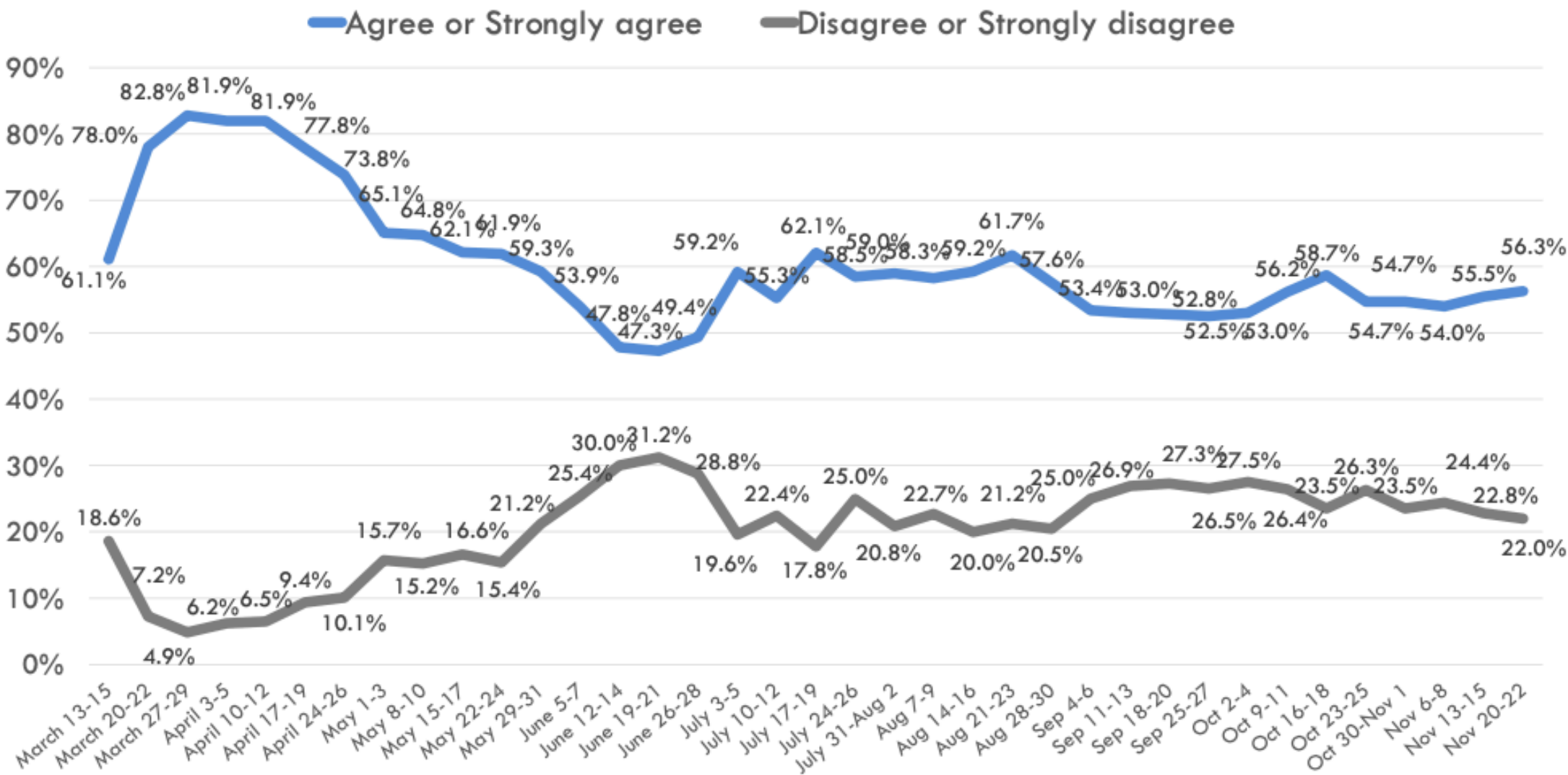
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



(Base: Waves 1-37. 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, 1,205, 1,206 and 1,205 completed surveys.

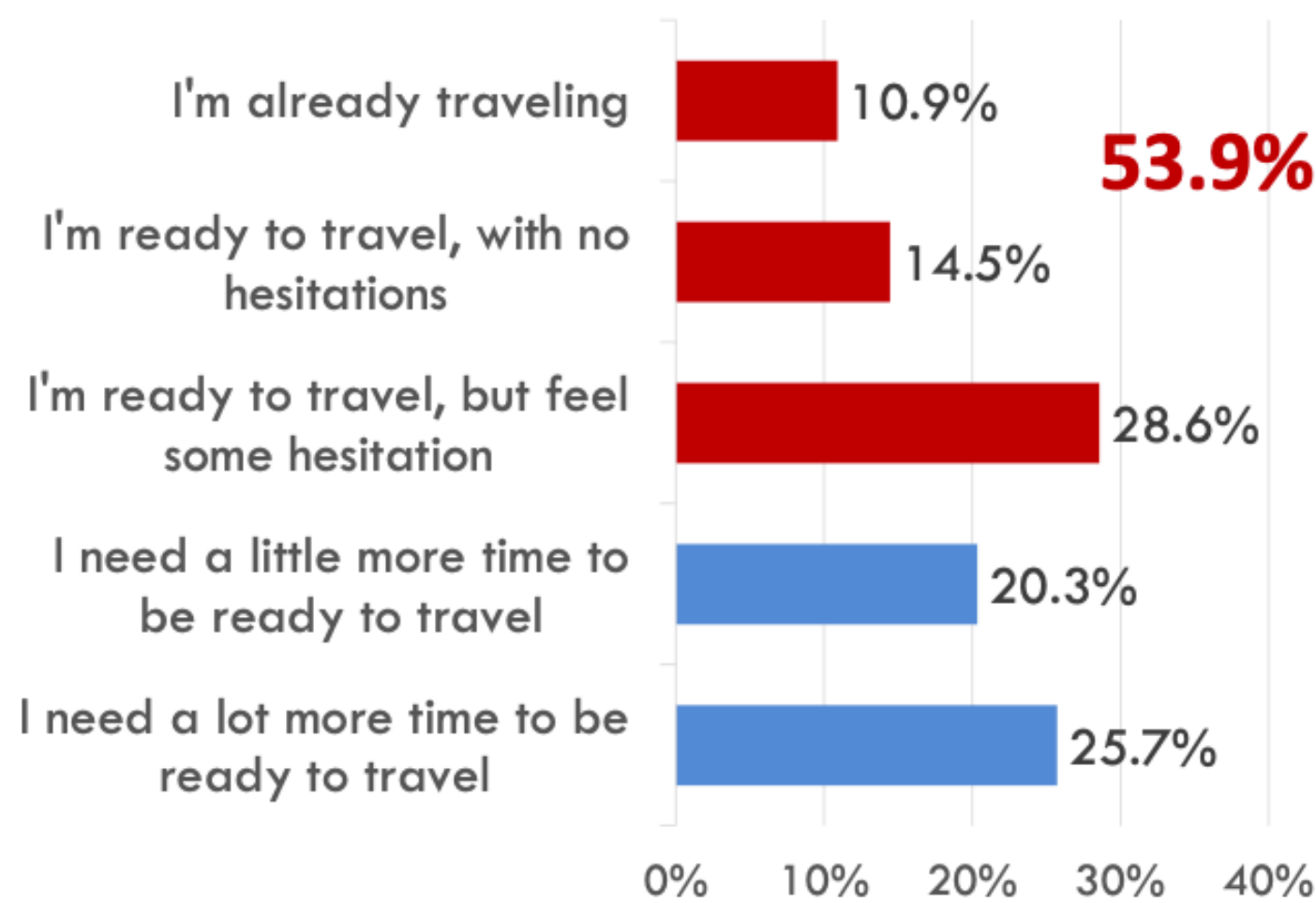
Historical data



AMERICANS' STATE OF MIND AROUND TRAVEL ALSO TOOK A DIP AFTER HOLDING CONSTANT FOR THE LAST TWO WEEKS, WITH THOSE IN A READINESS MINDSET FALLING TO 53.9%

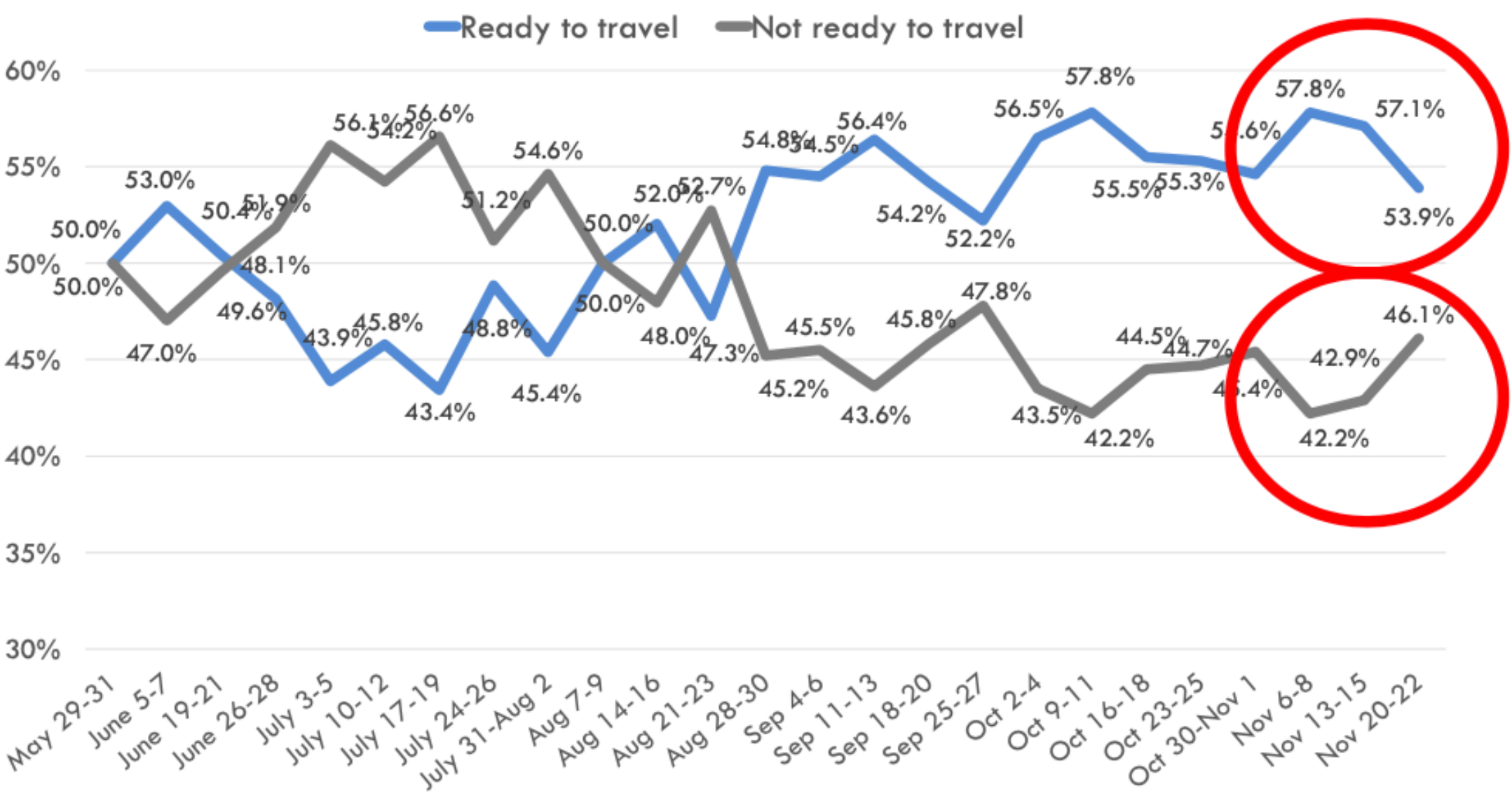
TRAVEL STATE-OF-MIND

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

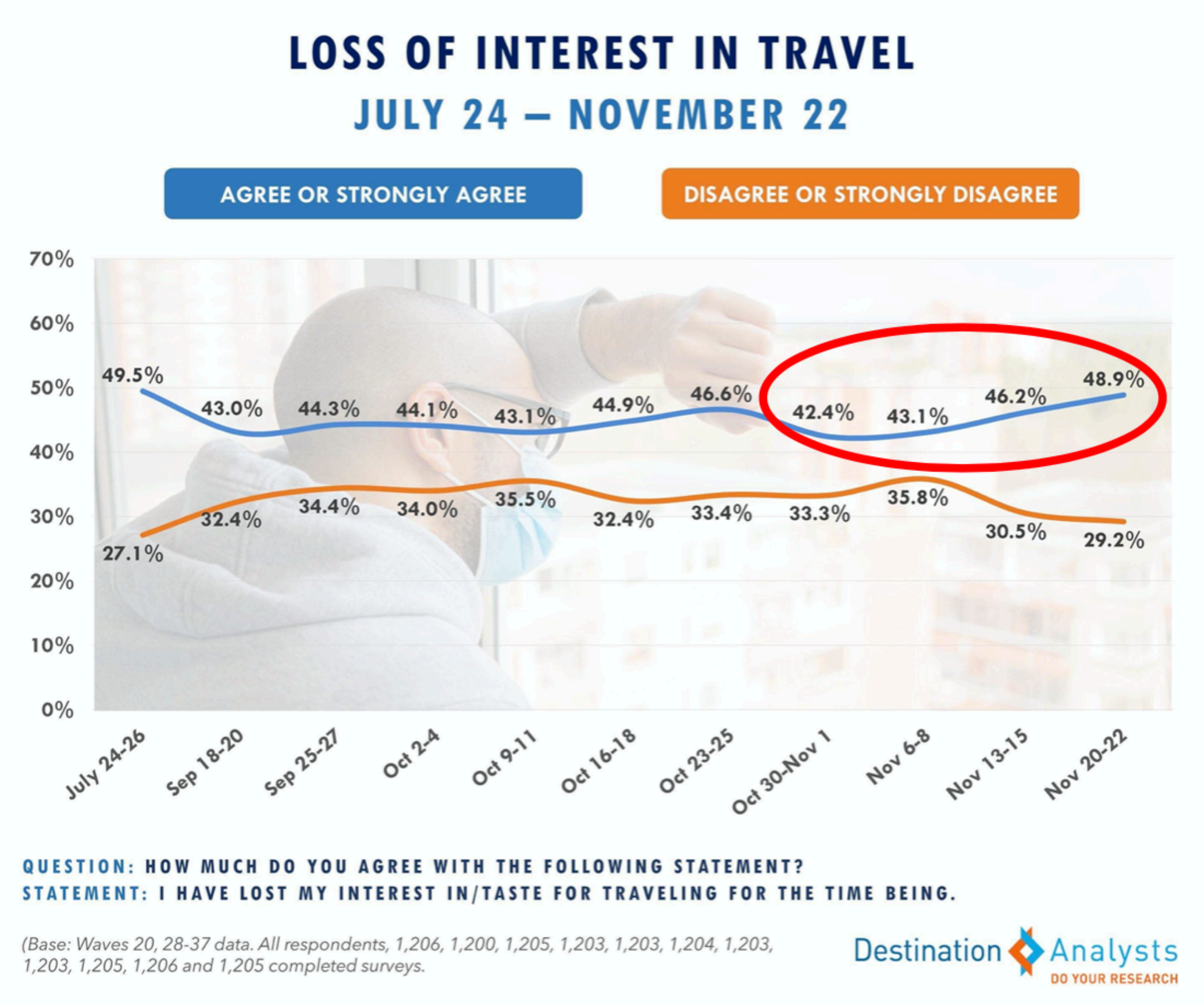


(Base: Waves 12-13 and 15-37. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.

Historical data



THE PERCENT OF AMERICANS WHO AGREE THEY HAVE LOST THEIR INTEREST IN TRAVEL FOR THE TIME BEING IS NOW APPROACHING HALF

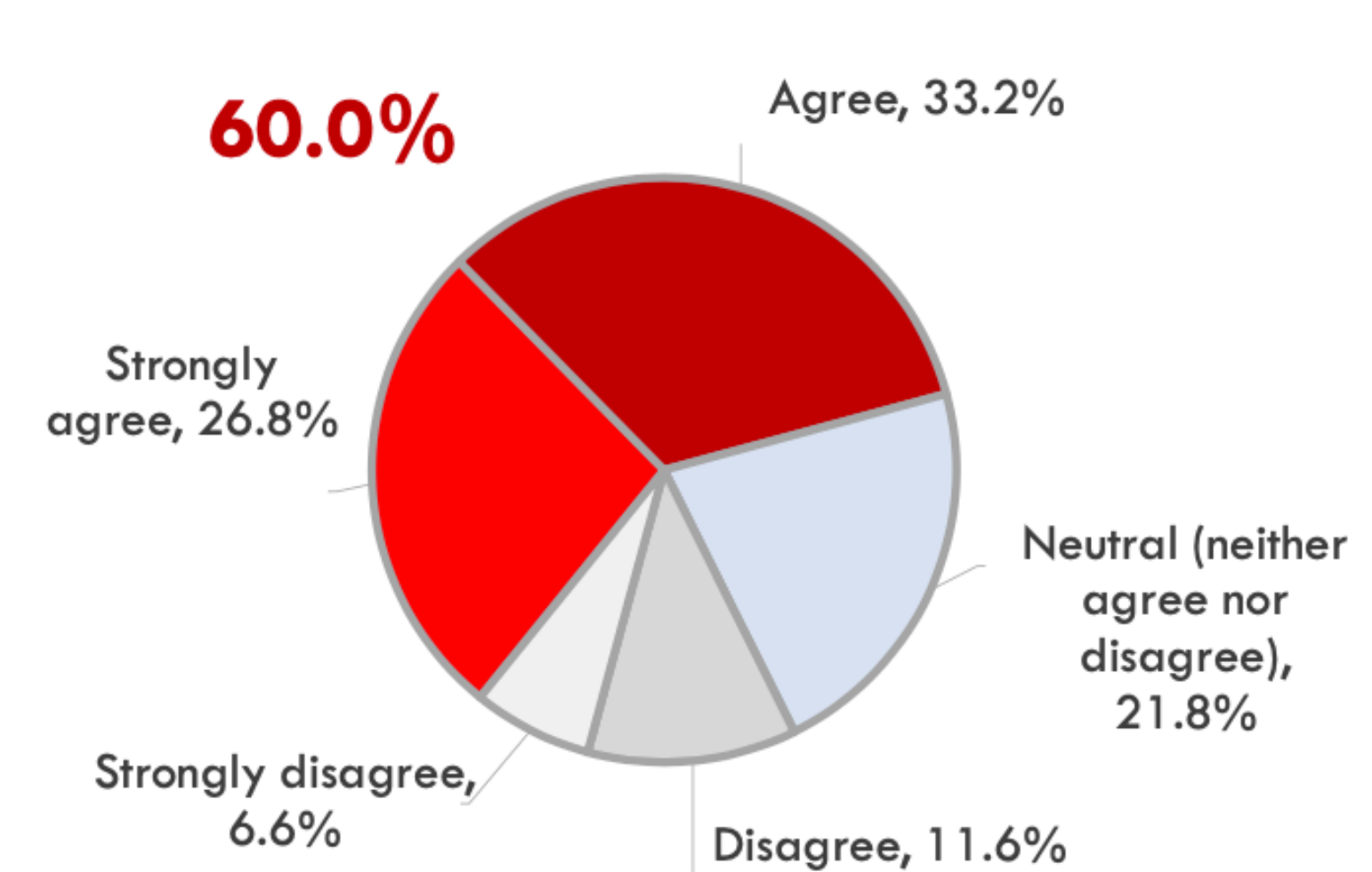


SIX-IN-TEN AMERICAN TRAVELERS CONTINUE TO FEEL THEY WOULD NOT BE ABLE TO FULLY ENJOY TRAVEL RIGHT NOW, AND NEARLY 52% SAY THEY WOULD FEEL GUILTY TRAVELING

INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

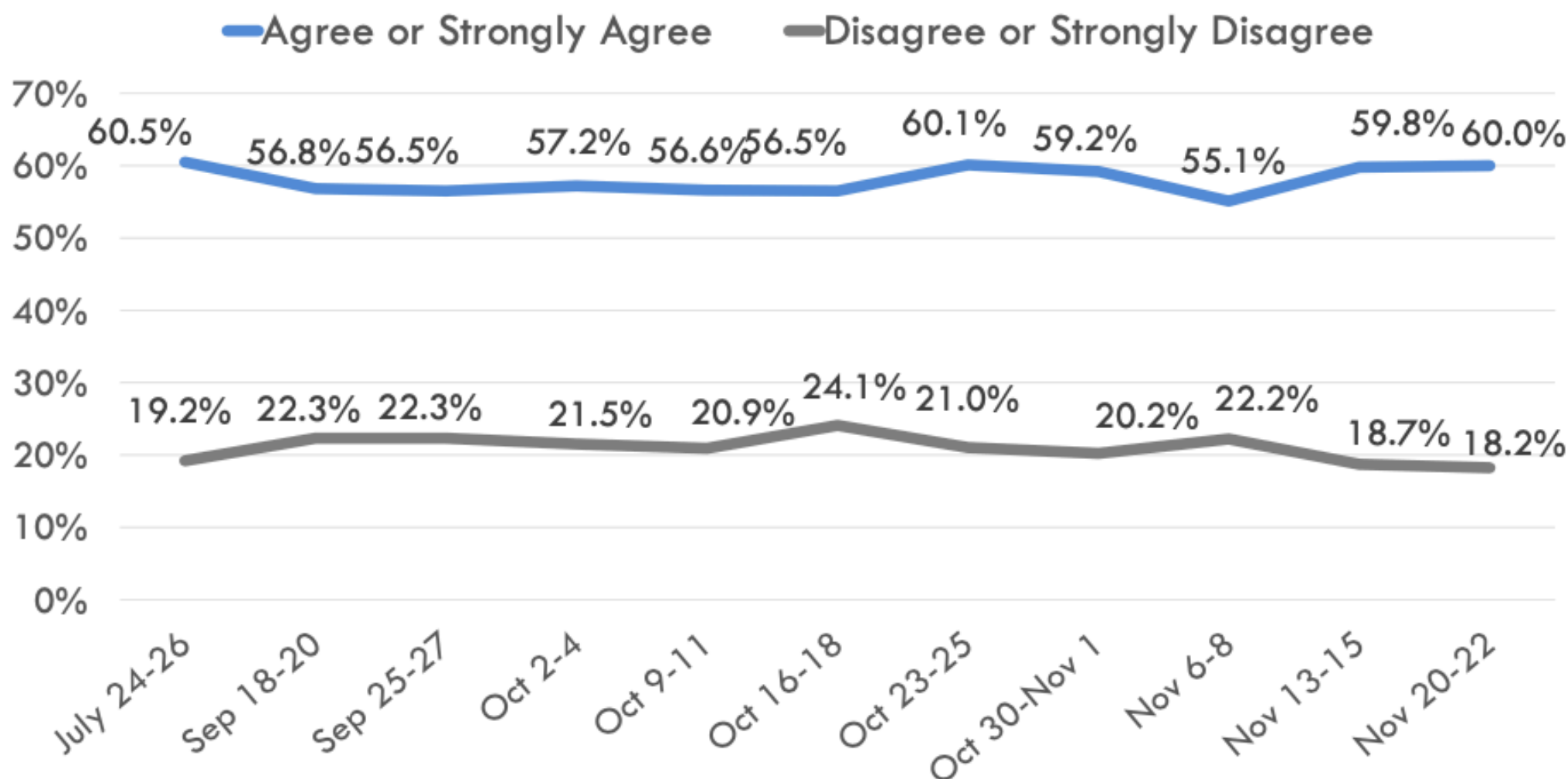
How much do you agree with the following statement?

Statement: If I were to travel now for leisure, I would not be able to fully enjoy it.



(Base: Waves 20, 28-37 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.

Historical data

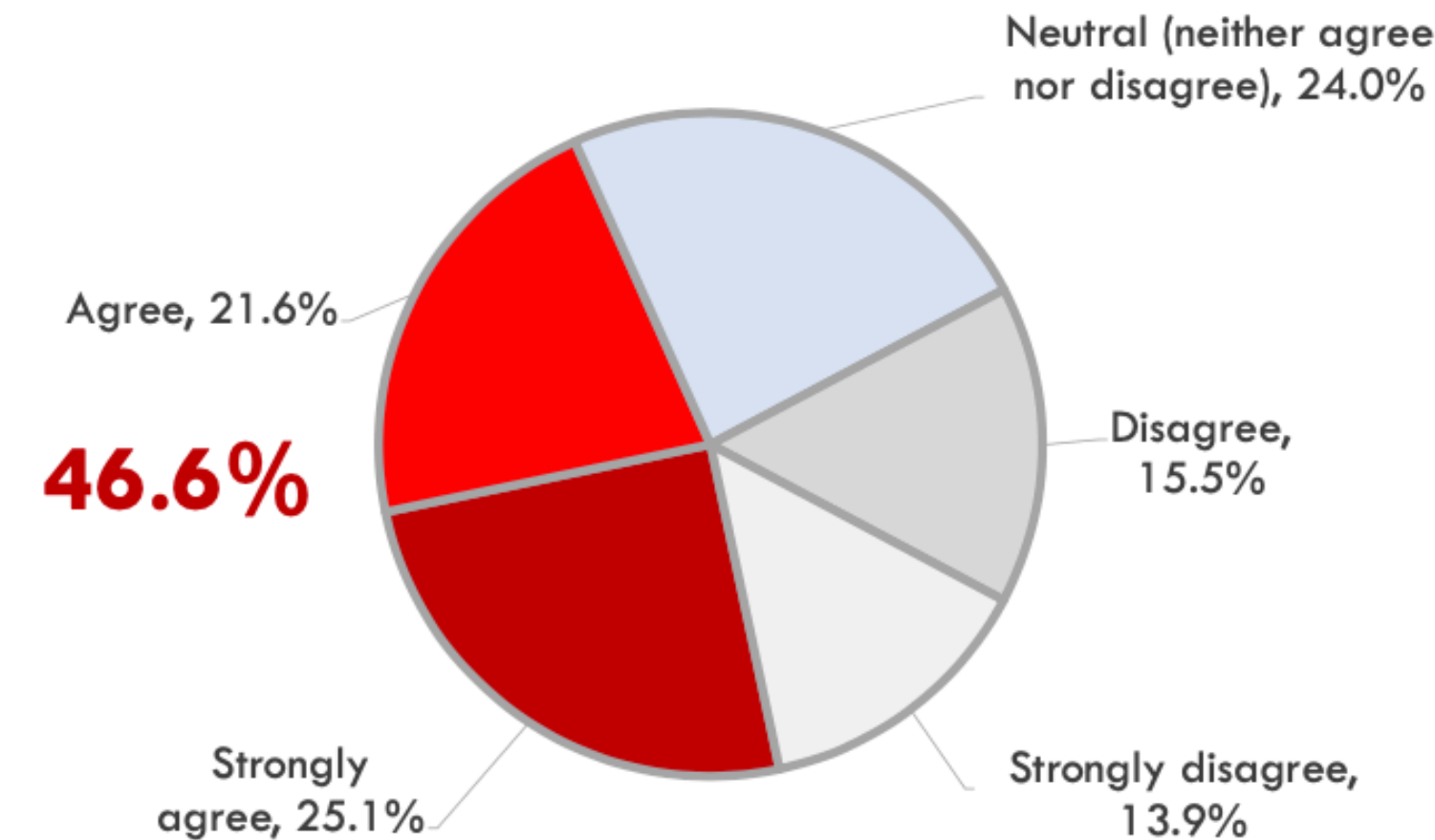


THE PROPORTION OF TRAVELERS SAYING THEY WON'T TRAVEL WITHOUT A VACCINE IS AT A PANDEMIC HIGH

WON'T TRAVEL WITHOUT VACCINE

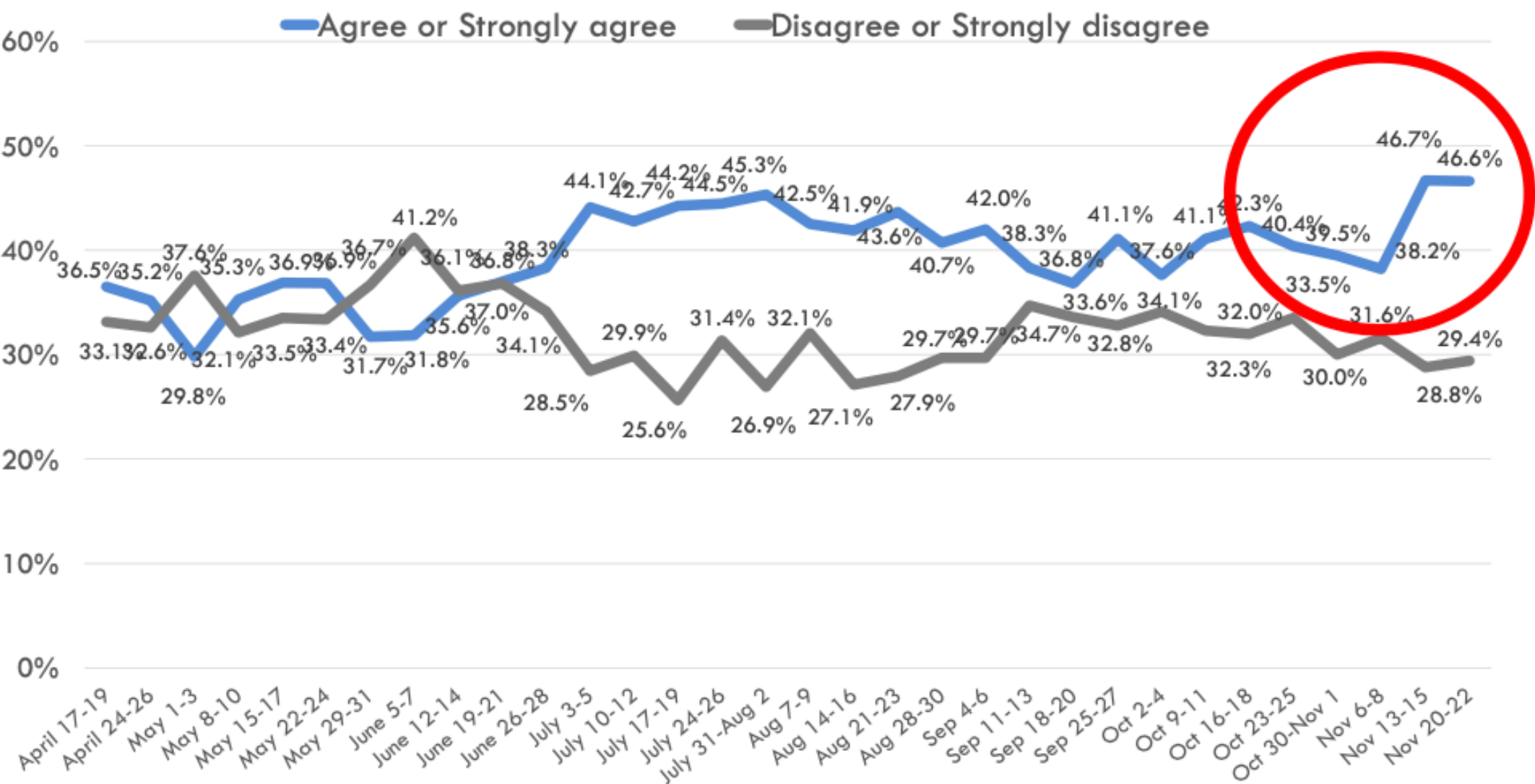
How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.



(Base: Waves 6-37. All respondents, 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, 1,205, 1,206 and 1,205 completed surveys.

Historical data



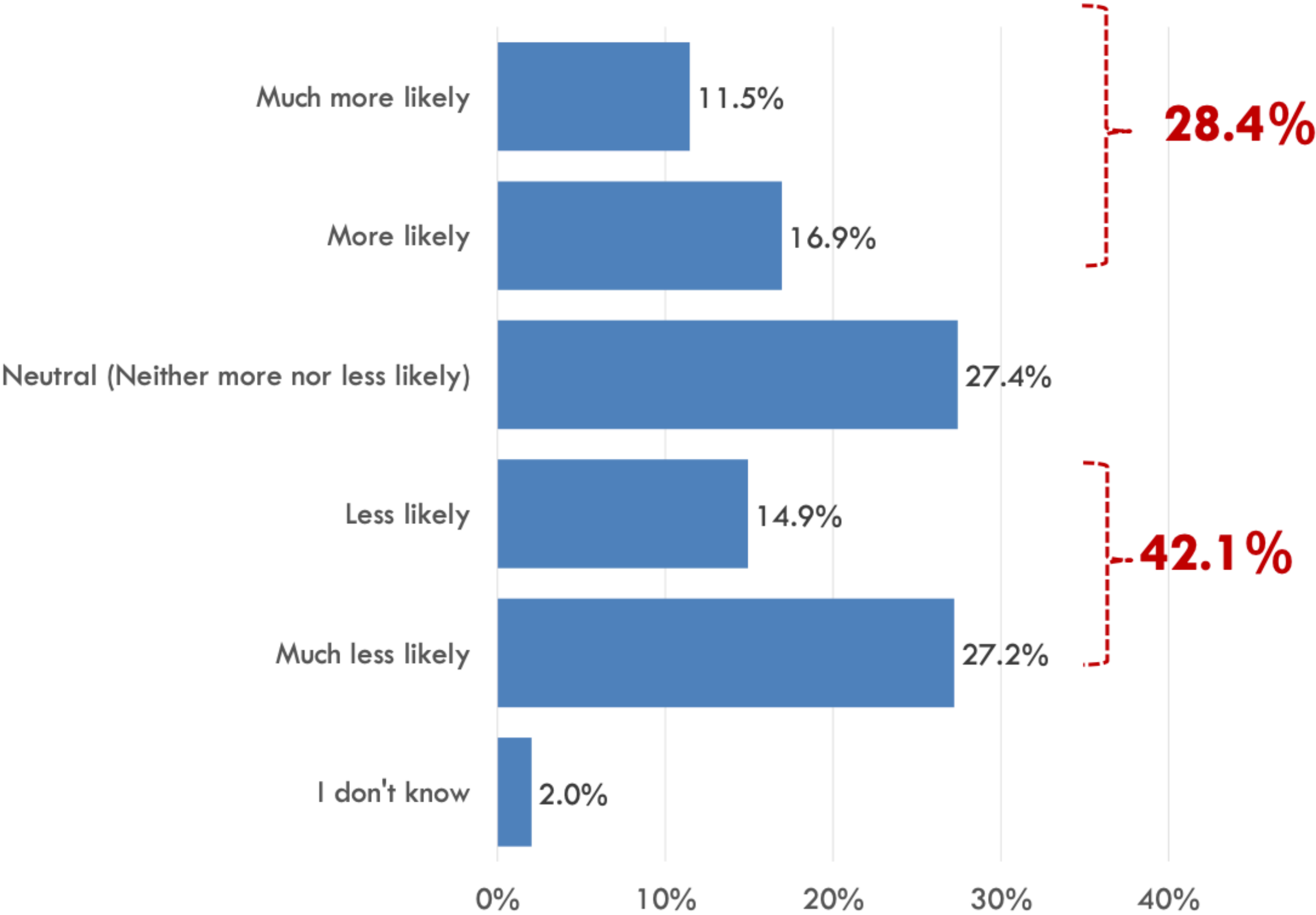
COVID RESTRICTIONS APPEAR TO HAVE OFFSETTING EFFECTS ON TRAVEL SENTIMENT, WITH SOME FEELING IT WILL SPUR TRAVEL, OTHER FEELING IT WILL DIMINISH THE LIKELIHOOD THEY WILL TRAVEL

RESTRICTIONS AND EFFECT ON LIKELIHOOD OF TRAVEL

Question: Do these new restrictions affect the likelihood that you will travel in the next TWO (2) MONTHS? (Select one to fill in the blank)

The new restrictions make me _____ to travel.

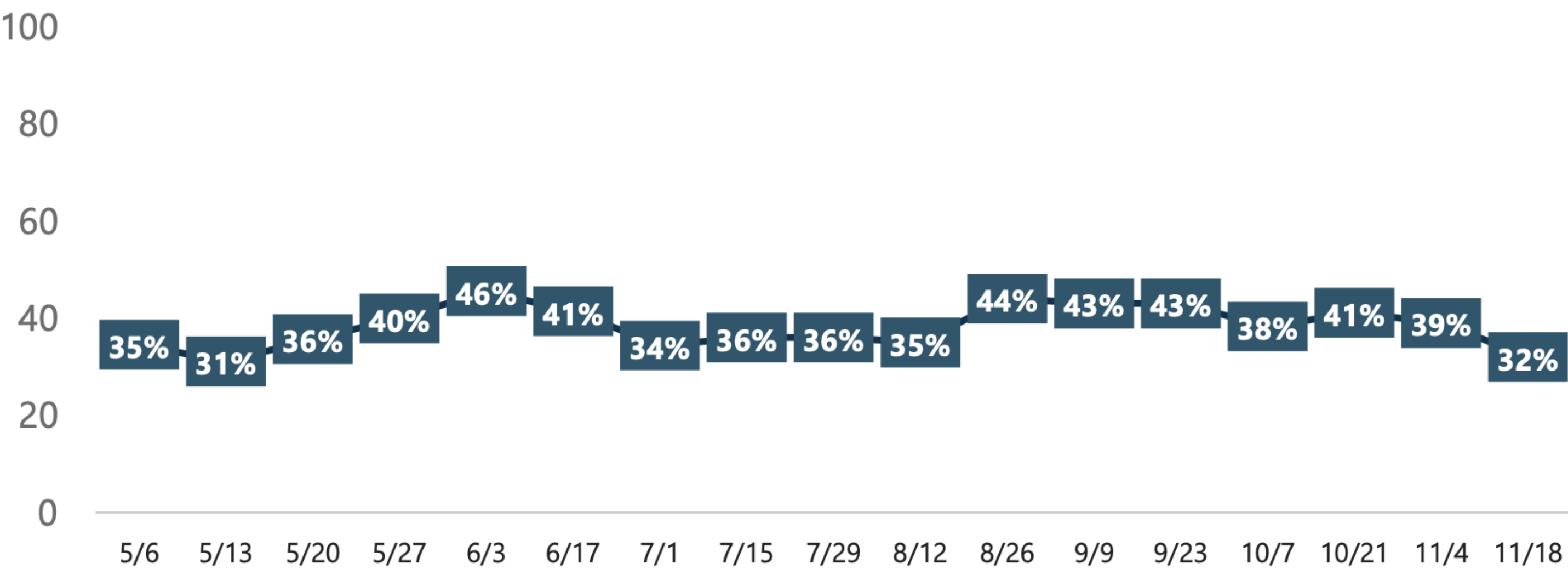
(Base: Wave 37 data. Respondents living in states with new restrictions, 452 completed surveys. Data collected November 20-22, 2020)



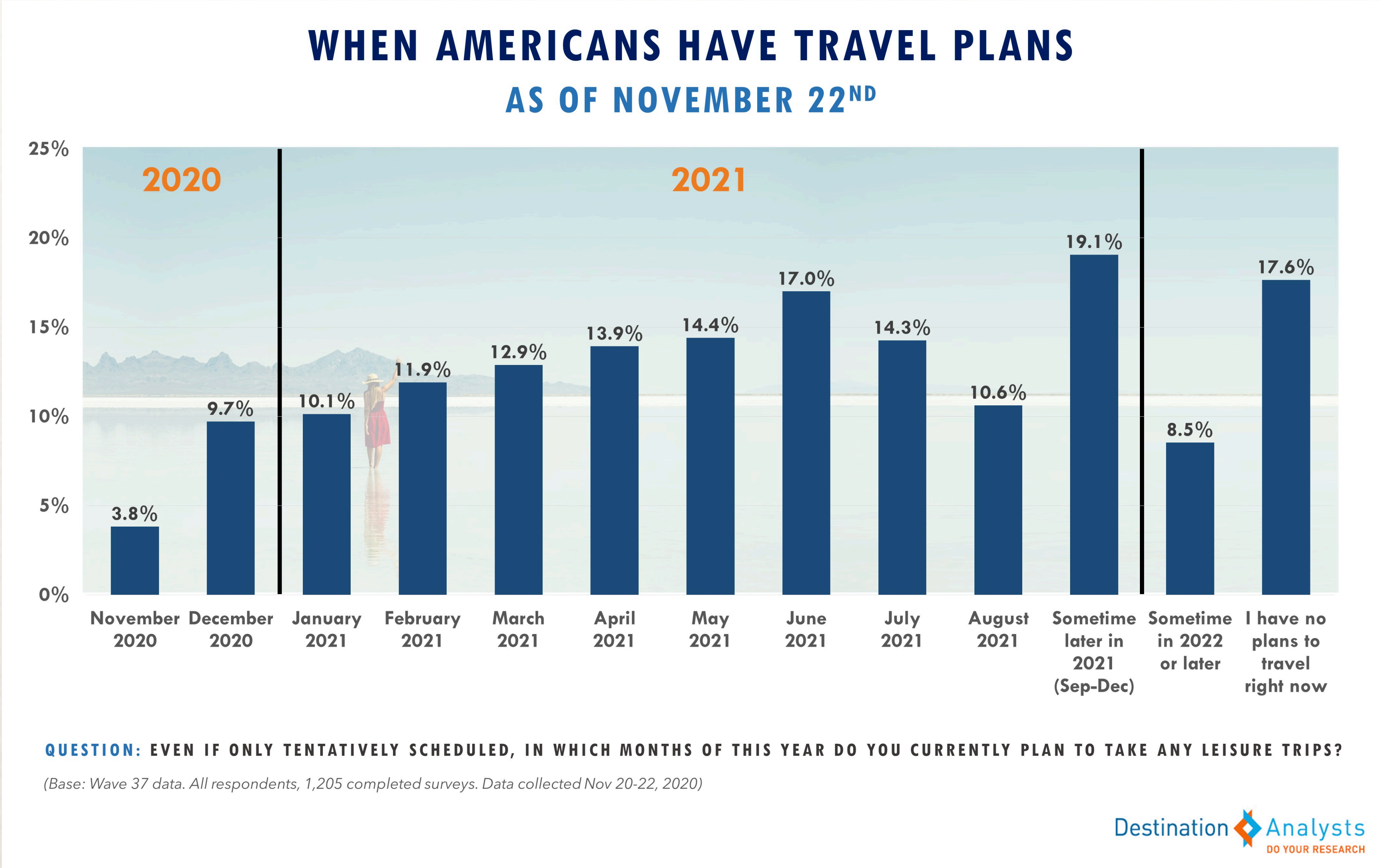
THE PERCENTAGE OF TRAVELERS WHO SUPPORT OPENING THEIR LOCAL COMMUNITIES TO VISITORS
DROPPED FROM 39% TO 32% IN THE PAST TWO WEEKS, THE LOWEST LEVEL IN MONTHS

TRAVEL PERCEPTIONS

I Support Opening Up My Community to Visitors
Comparison of Travelers Who Strongly Agree or Agree



OVER 82% HAVE AT LEAST TENTATIVE PLANS FOR TRAVEL, WITH FULLY 17% SAYING THEY PLAN TO TAKE A TRIP AT THE START OF SUMMER 2021



KEY TAKEAWAYS

1

The Fall wave of infections has clearly impacting traveler sentiment over the last several weeks. This continues to devastate sentiment about near-term travel and the industry's ability to inspire new, incremental trips. 61.9% of American travelers continue to agree that the current surge in cases has made them less likely to travel in the next three months.

2

The proportion of travelers saying they won't travel without a vaccine is at a pandemic high; however, optimism that a vaccine will be ready by year end is quickly growing, as is its perceived safety.

3

Travelers are feeling the weight of new restrictions at the local and state levels, with most expecting more to come. Covid restrictions appear to have offsetting effects on travel sentiment, with some feeling it will spur travel, other feeling it will diminish the likelihood they will travel.

4

Americans continue to report having trips planned over the next year (82%). As they look to where they want to travel to over the next year, Americans are most commonly reporting that relaxing, fun, memorable, affordable and comforting are important attributes in the destinations they consider.