

TOURISM RESEARCH UPDATE

CHATTANOOGA TOURISM CO.

July 2, 2020

CHATTANOOGA
TOURISM CO.

Overview

Chattanooga Tourism Co. and the Chattanooga Chamber are tracking the latest data on the impacts of COVID-19 on the Hamilton County Tourism Community.

This deck includes the latest tourism recovery indicators and accommodations data.

A new deck will be released EOD each Thursday.

Research Summary

Safety measures more important than ever to travelers

Rise in COVID Cases nationwide has caused a stall in the return to travel

Affordability, Relaxing, Uncrowded top the most important destination attributes to travelers

Families are booking hotel rooms in the 0-15 day window have returned to pre-pandemic levels

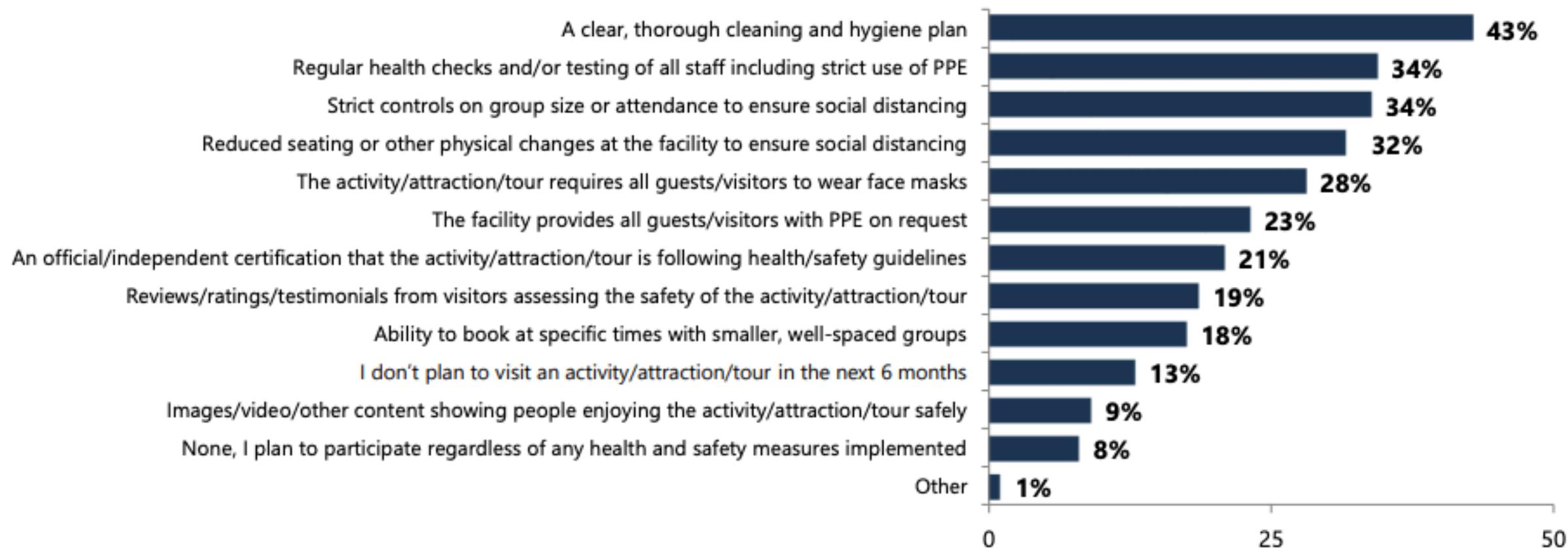
New June 2020 report forecasts US Travel spending down 45% in 2020 and returning to 2019 levels will not happen until 2023.

Occupancy in Hamilton County rose to 56% last week, hitting 76% on Saturday, June 27th. Occupancy this weekend is expected to better 90%.

26,000 people have employment in the hospitality industry in Hamilton County in May. Up from 20,000 in April, but still down from 31,300 in 2019.

IMPACT ON TRAVEL PLANS

Health and Safety Factors Important to Travelers When Considering Activities, Attractions, or Tours



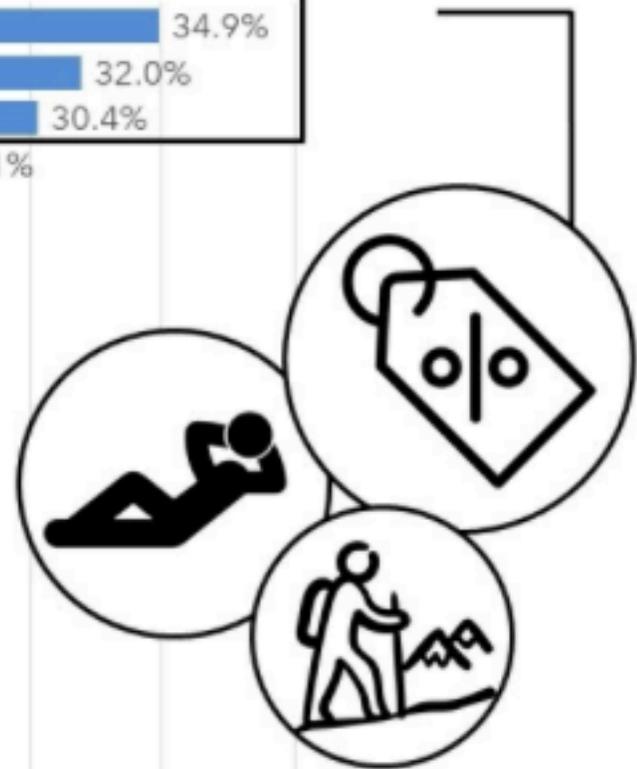
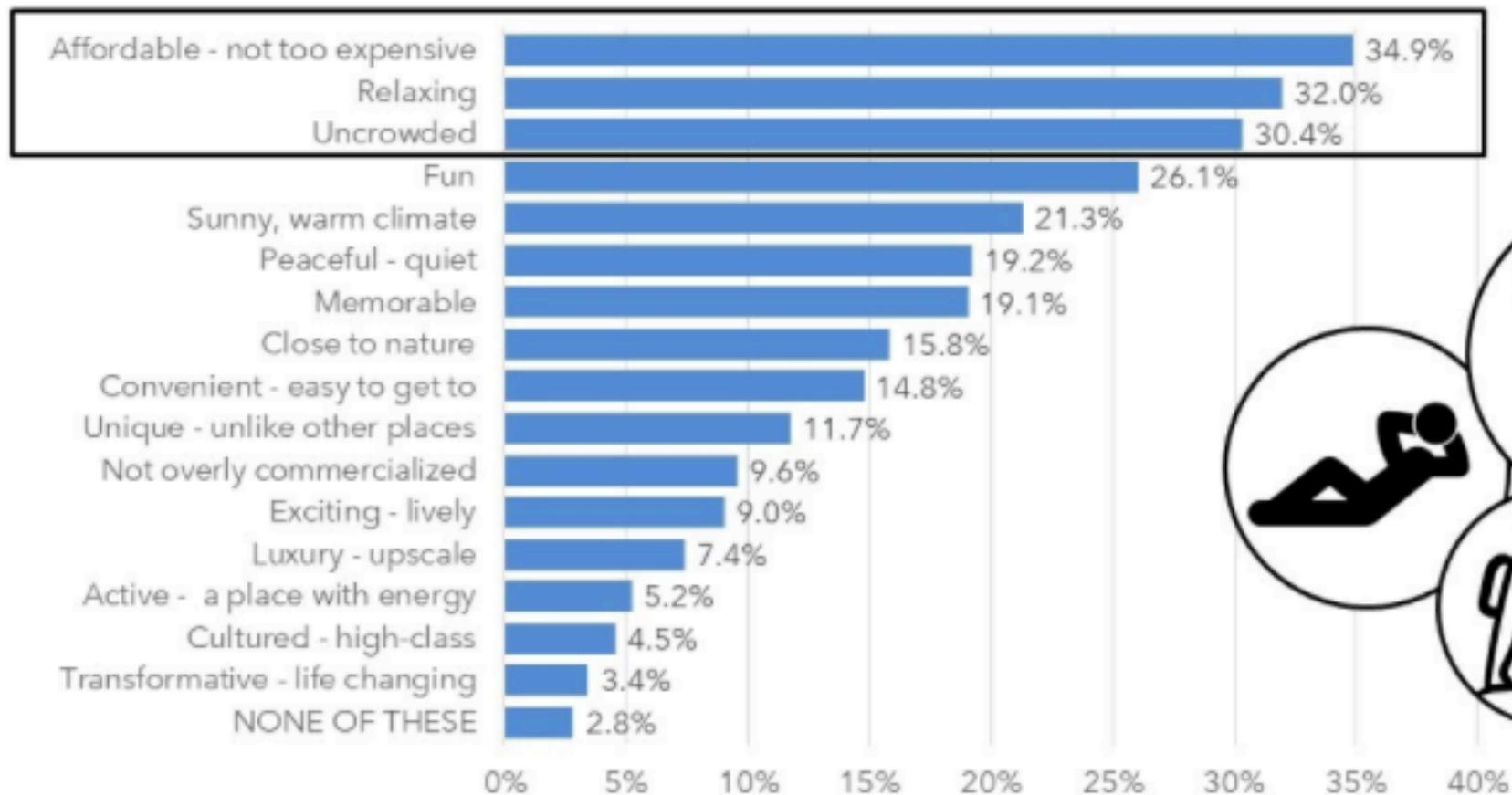
Personal Safety

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

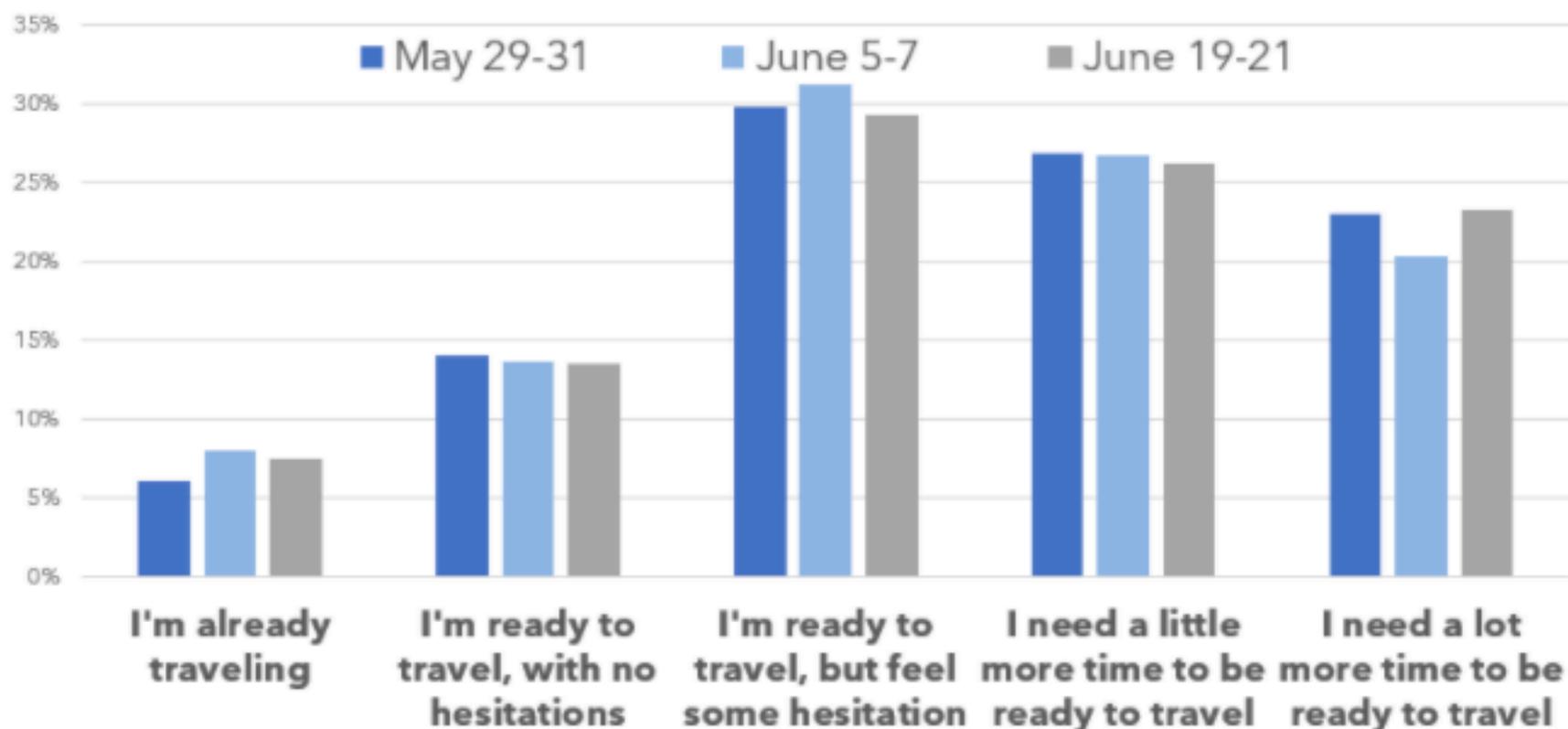
Top Three Most Important Destination Attributes for Trip Destination Selection



Question: Which attributes will be MOST IMPORTANT to you in selecting where you visit in the next TWELVE (12) MONTHS? (Select as many as 3)

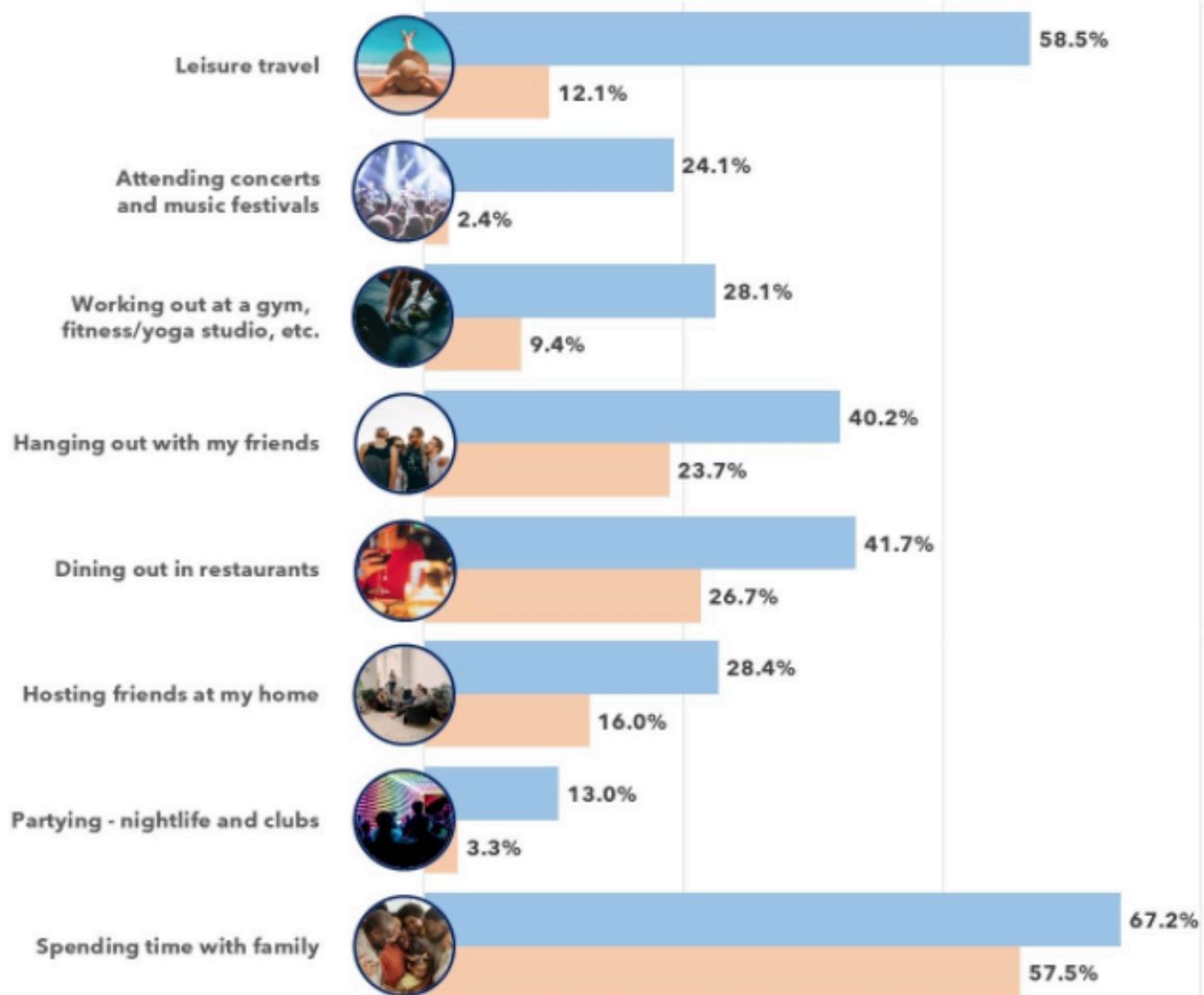
(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)

Travel Readiness State of Mind (as of June 21st)

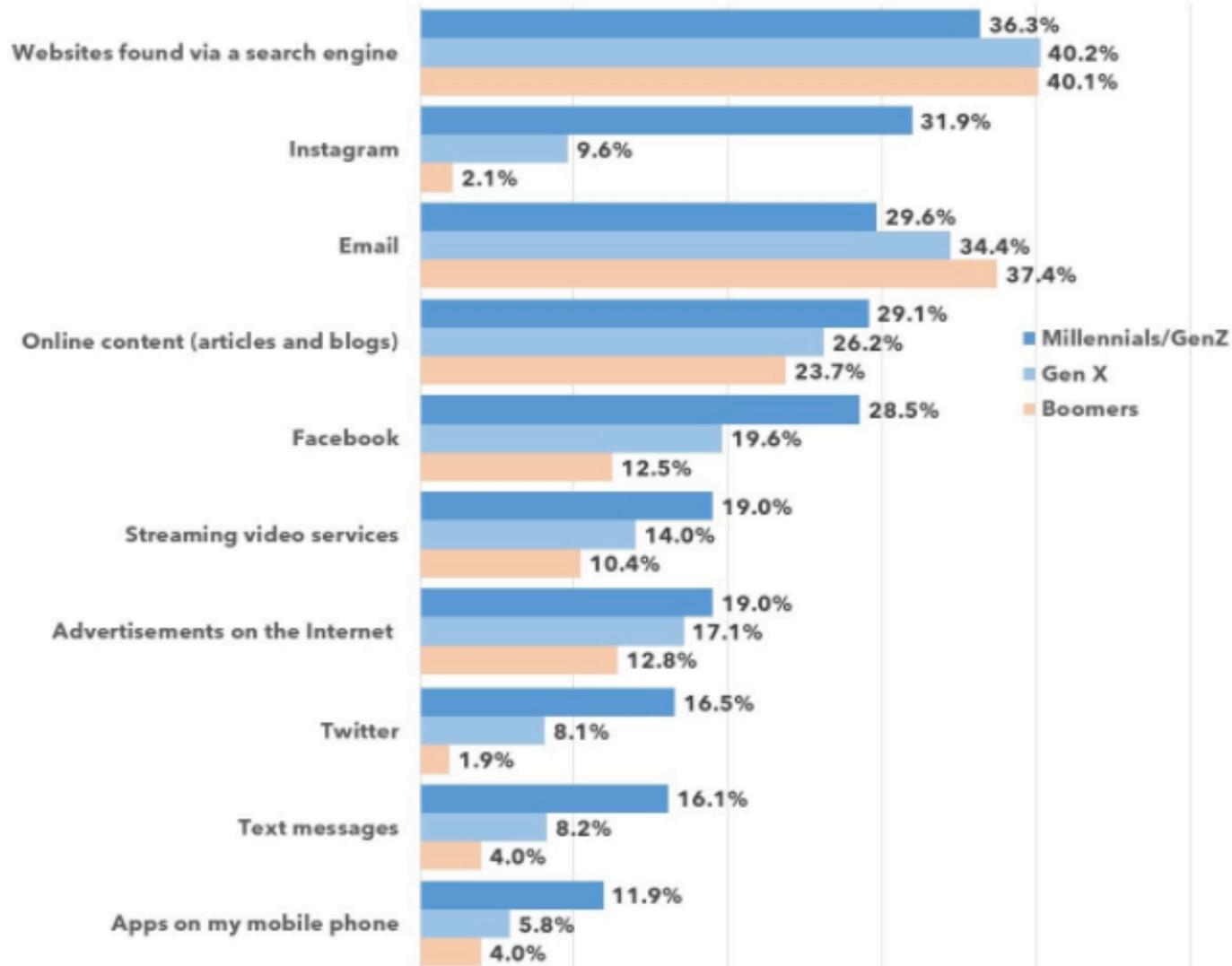


Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one) (Base: All respondents, 1,205 completed surveys. Data collected June 19-21, 2020)

IMPORTANCE TO LIFESTYLE VERSUS RECENT ACTIVITIES DONE



WHERE TRAVELERS ARE MOST RECEPTIVE TO DESTINATION MARKETING

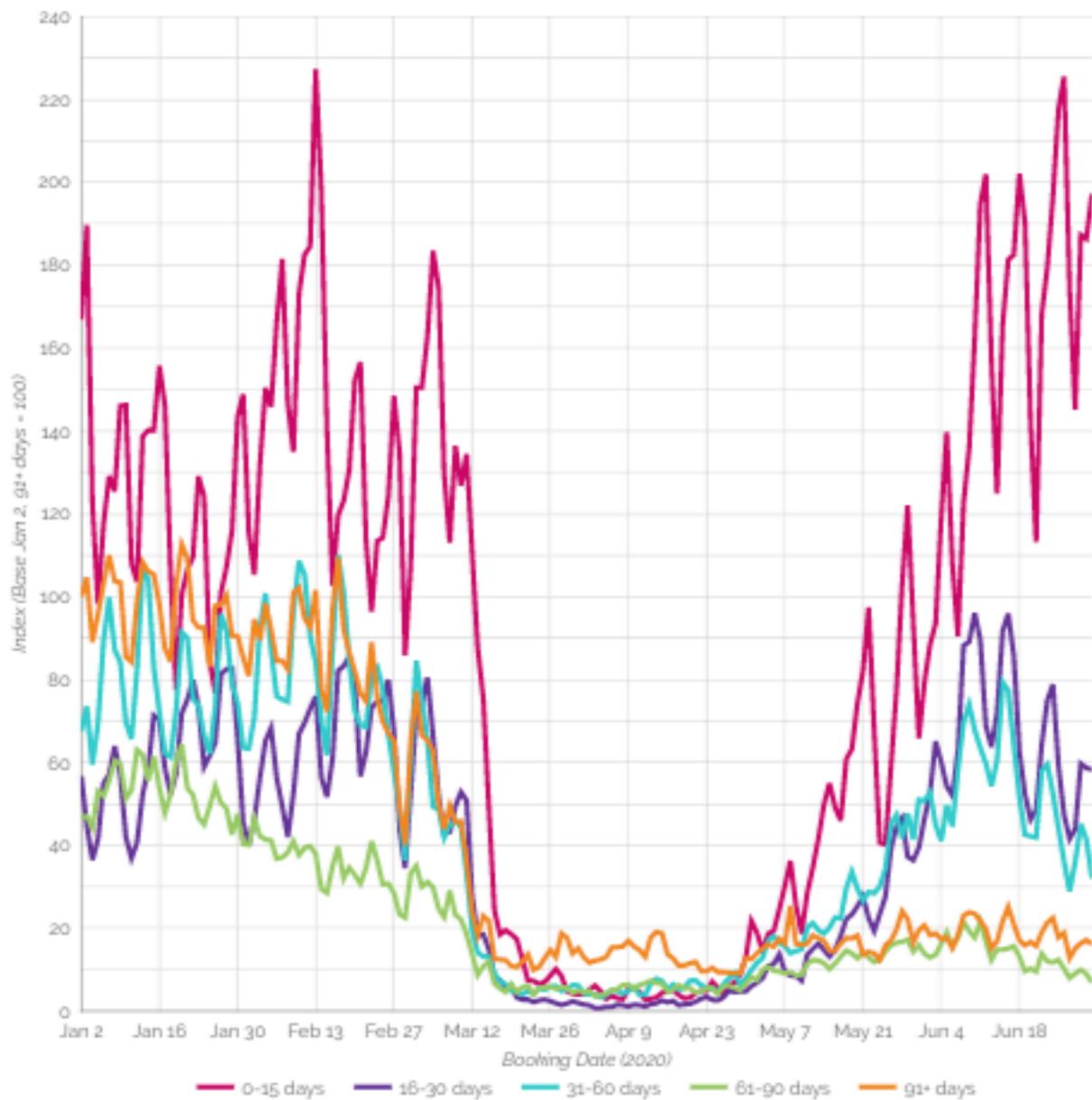


EMOTIONS FELT DURING THE RE-OPENING



Question: Which of these words describe FEELINGS YOU HAVE HAD at any point during re-opening of the economy? (Select only those you have felt related to the Coronavirus situation)

TRIP PURPOSE: LEISURE – FAMILY



U.S. TRAVEL FORECAST

					TRAVEL FORECAST			
	2017	2018	2019	2020	2021	2022	2023	
Total Travel Spending in the U.S. (\$ Billions)	1,038	1,089	1,127	622	855	976	1,049	
U.S. Residents	882	933	972	583	787	874	921	
International Visitors ²	156	156	155	39	67	102	128	

U.S. TRAVEL FORECAST (GROWTH)

					TRAVEL FORECAST			
	2017	2018	2019	2020	2021	2022	2023	
Total Travel Spending in the U.S.	4.4%	4.9%	3.5%	-44.8%	37.5%	14.2%	7.4%	
U.S. Residents	5.2%	5.8%	4.2%	-40.0%	35.0%	11.0%	5.4%	
Average Spending per Trip	3.6%	4.0%	2.3%	-14.7%	6.4%	2.0%	2.1%	
International Visitors ²	0.1%	0.3%	-1.1%	-75.1%	75.0%	52.0%	25.0%	
Average Spending per Trip	-0.9%	-2.9%	-0.5%	-31.8%	7.1%	12.8%	7.9%	



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Cases Growth Rate

7-day avg

2.2%

↓-0.6% over 14 days

Case Doubling Time

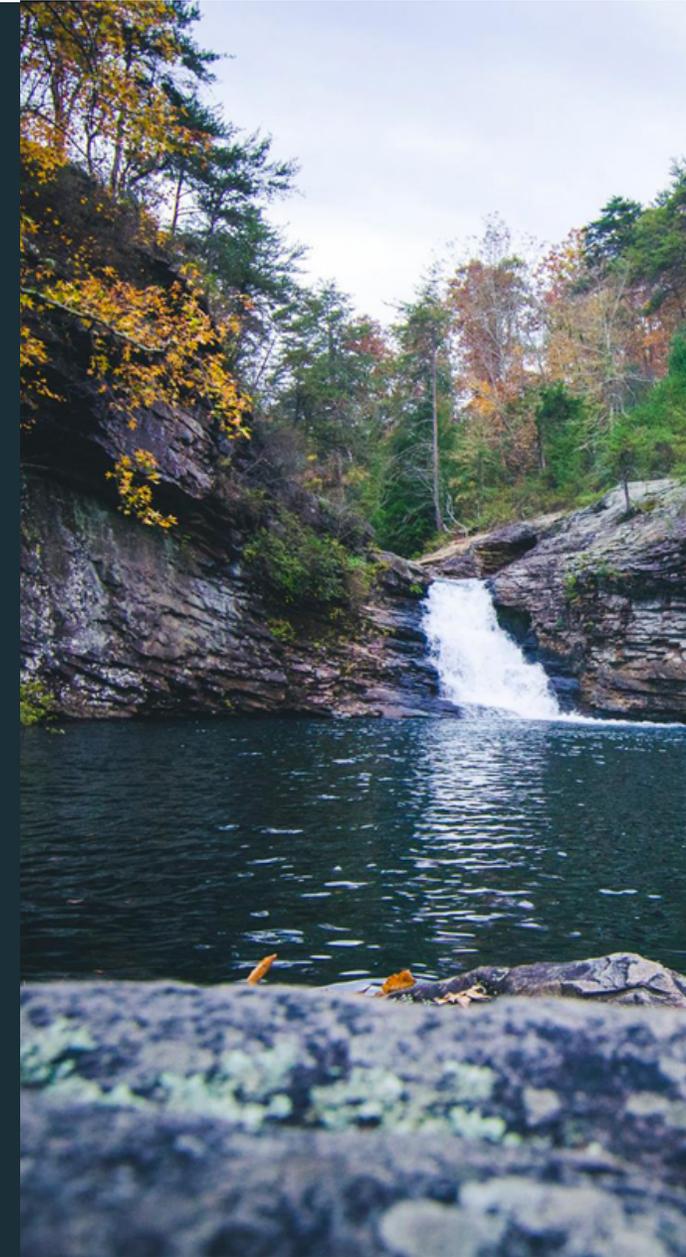
(# days)

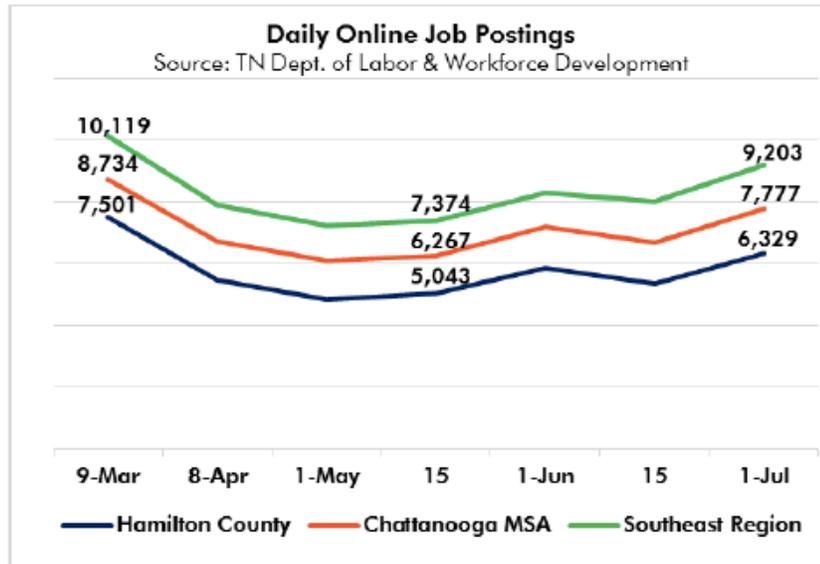
32.6

↑6.9 over 14 days

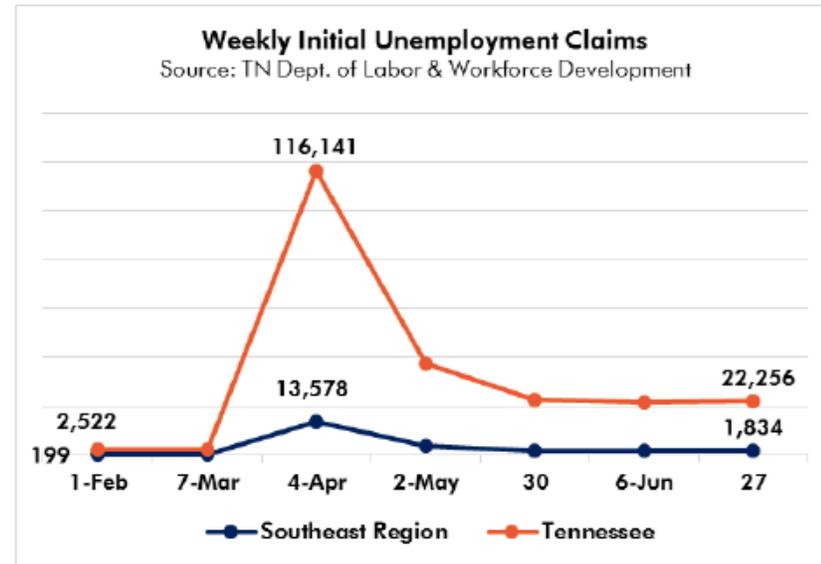
Source: [Hamilton County Health Department](#)

CHAMBER COLLECTED COVID IMPACT DATA

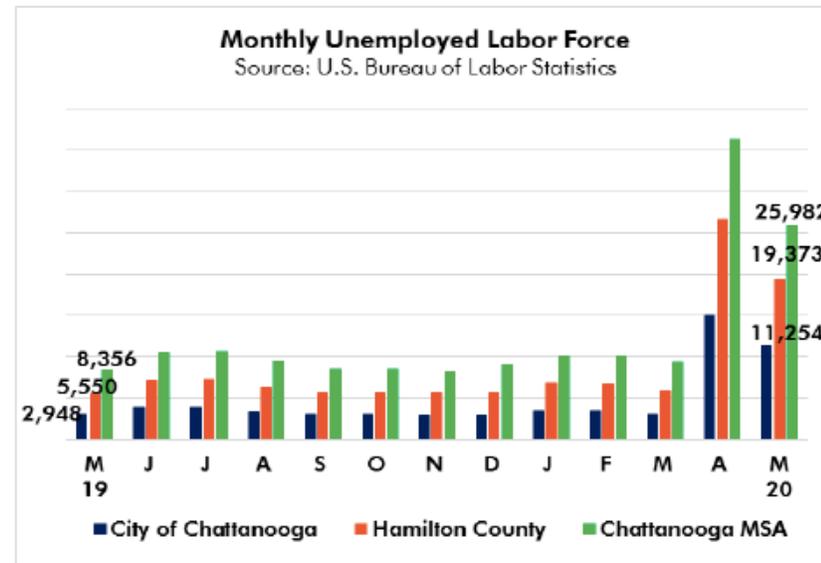
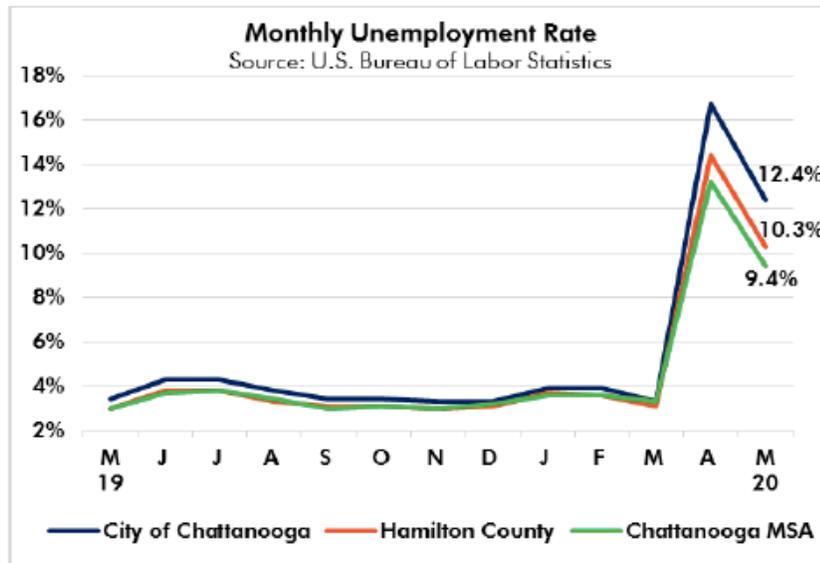




Southeast Region includes the following counties: Bledsoe, Bradley, Grundy, Hamilton, McMinn, Marion, Meigs, Polk, Rhea and Sequatchie



As of June 27, 2020 there are 262,224 continued claims in Tennessee.



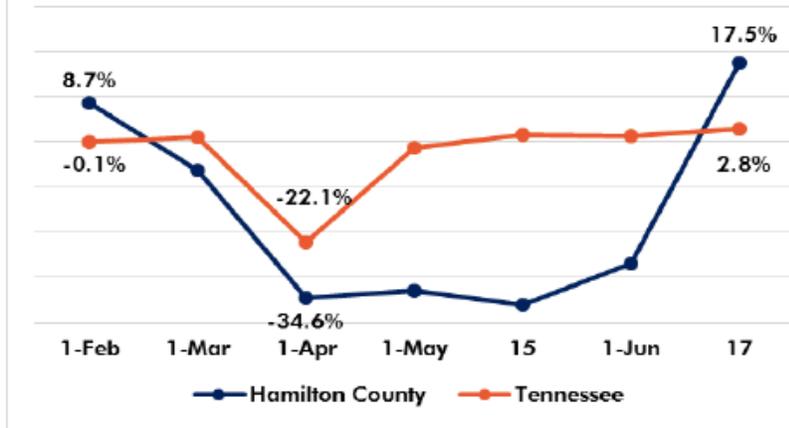
Monthly Jobs by Sector for May - Chattanooga MSA

Source: U.S. Bureau of Labor Statistics

Sector	2019	2020	Change	% Change
Leisure & Hospitality	31,300	26,000	-5,300	-16.9%
Information	2,300	2,100	-200	-8.7%
Government	38,200	35,000	-3,200	-8.4%
Professional & Business Services	27,900	26,100	-1,800	-6.5%
Mining, Logging & Construction	11,300	10,600	-700	-6.2%
Wholesale Trade	8,500	8,000	-500	-5.9%
Retail Trade	27,300	26,300	-1,000	-3.7%
Manufacturing	34,200	33,000	-1,200	-3.5%
Other Services	12,400	12,200	-200	-1.6%
Transportation, Warehousing & Utilities	17,200	17,300	100	0.6%
Education & Health Services	34,500	35,600	1,100	3.2%
Financial Activities	21,700	23,100	1,400	6.5%
TOTAL	266,800	255,300	-11,500	-4.3%

Daily % Change in Avg. Consumer Credit & Debit Card Spending - Indexed to January 2020

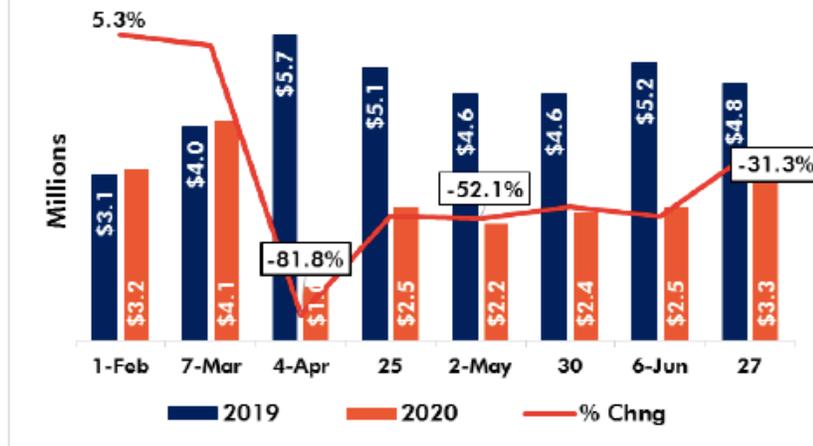
Sources: Affinity Solutions; Harvard et al



Weekly Hotel Revenue and % Change

Hamilton County, TN

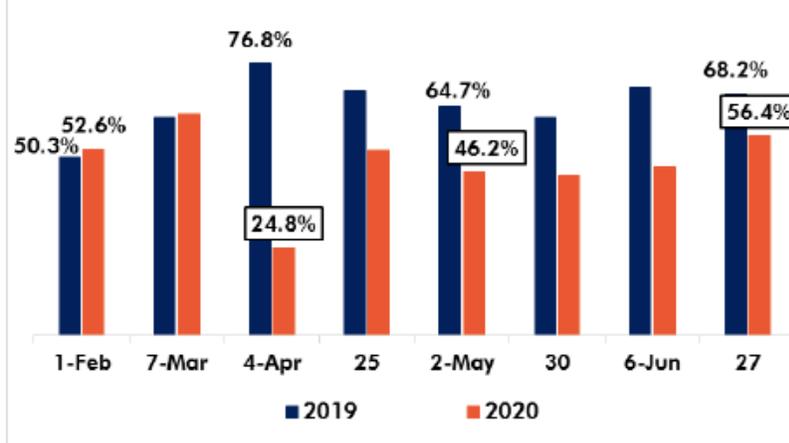
Sources: STR, Inc., STR Global, Ltd.; Chattanooga Tourism Company

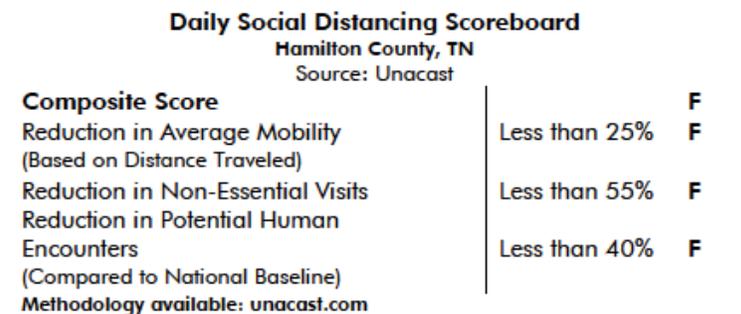
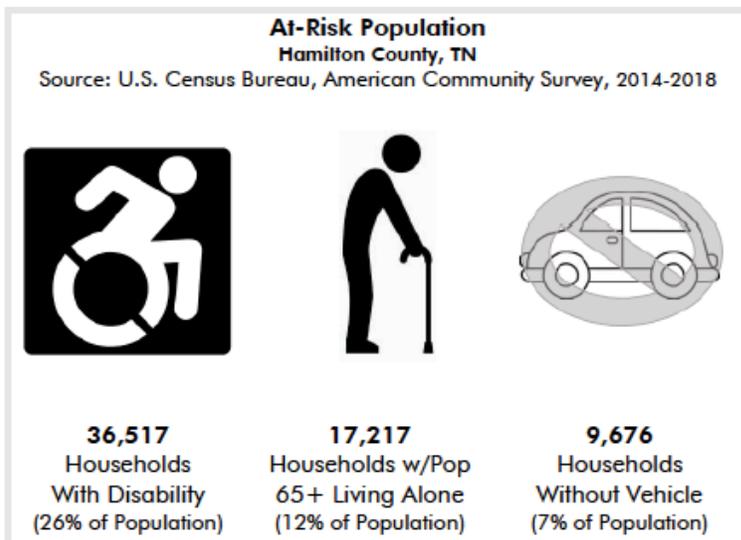


Weekly Hotel Occupancy Rate

Hamilton County, TN

Sources: STR, Inc., STR Global, Ltd.; Chattanooga Tourism Company



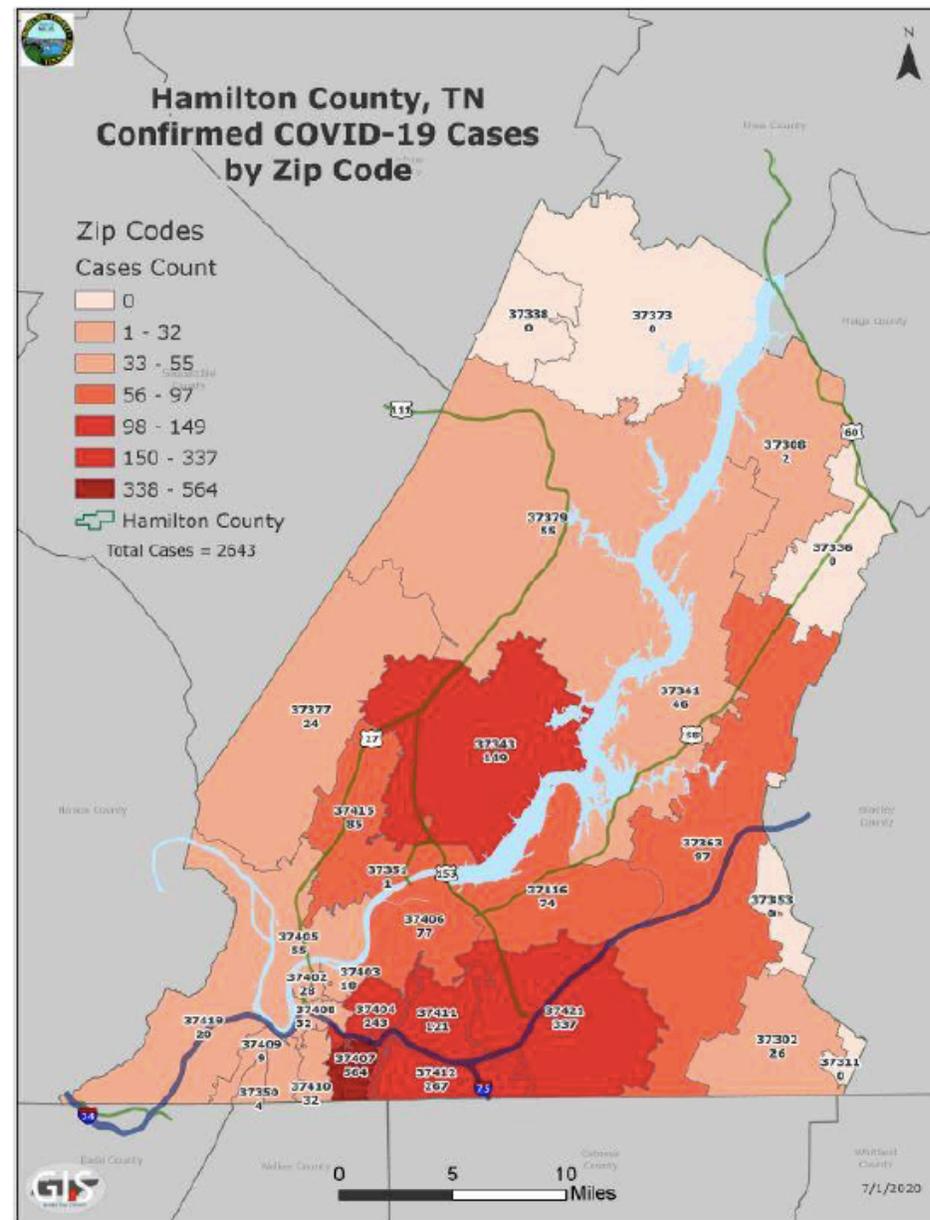


Daily COVID-19 Testing and Outcomes Hamilton County, TN

Sources: Hamilton County and TN Departments of Health

	This Week	Last Week
Positive	2,643	2,277
Negative	26,220	22,680
Deaths	30	29

Social Distancing, Testing and Outcomes Data as of July 1, 2020



The first known case of COVID-19 was reported in Hamilton County on March 13, 2020.

Contact

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For accommodations data

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For economic indicators



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