

# TOURISM RESEARCH UPDATE

CHATTANOOGA TOURISM CO.

August 13, 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.**

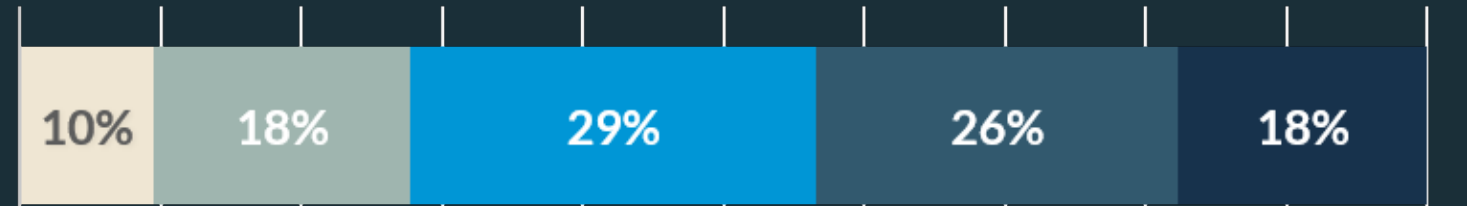
**A new deck will be released EOD each Thursday.**

# Research Summary

- Chattanooga Area Hotel Occupancy leads the region at 50%
- Occupancy reached new high during pandemic at 91%  
Saturday of Labor Day Weekend
- Must instill confidence by communicating restrictions and precautions to travelers
- Road Trips are going to continue to dominate
- VFR, Outdoor and Sporting events are primary motivators for travel

# Perceptions of Safety for Visitors and Travel

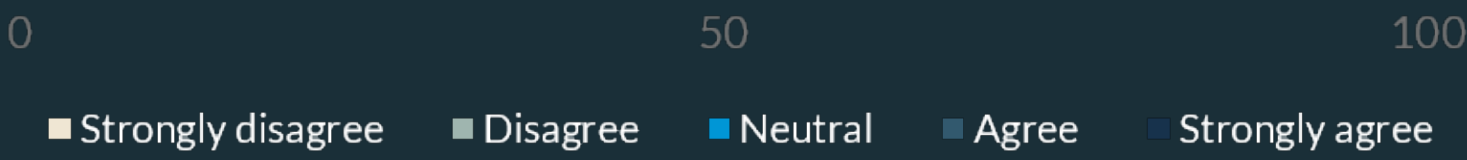
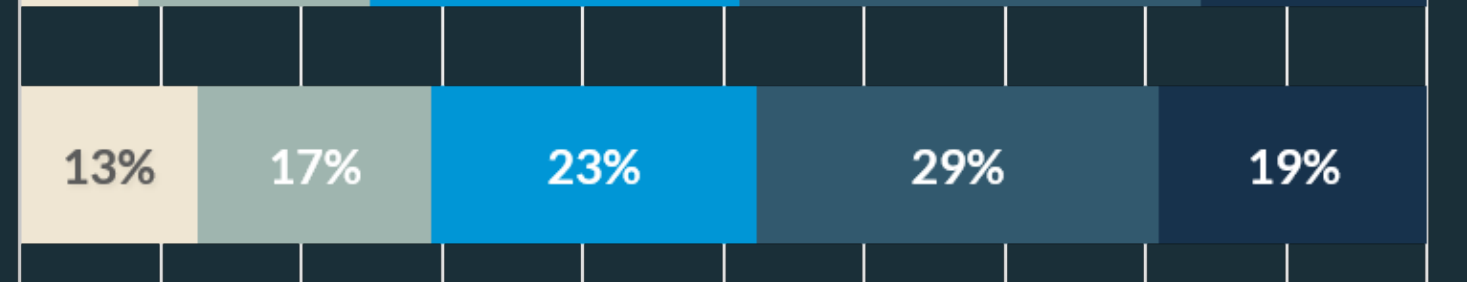
I support opening up my community to visitors



I feel safe traveling outside my community



I would feel safe dining in local restaurants and shopping in retail stores in my community

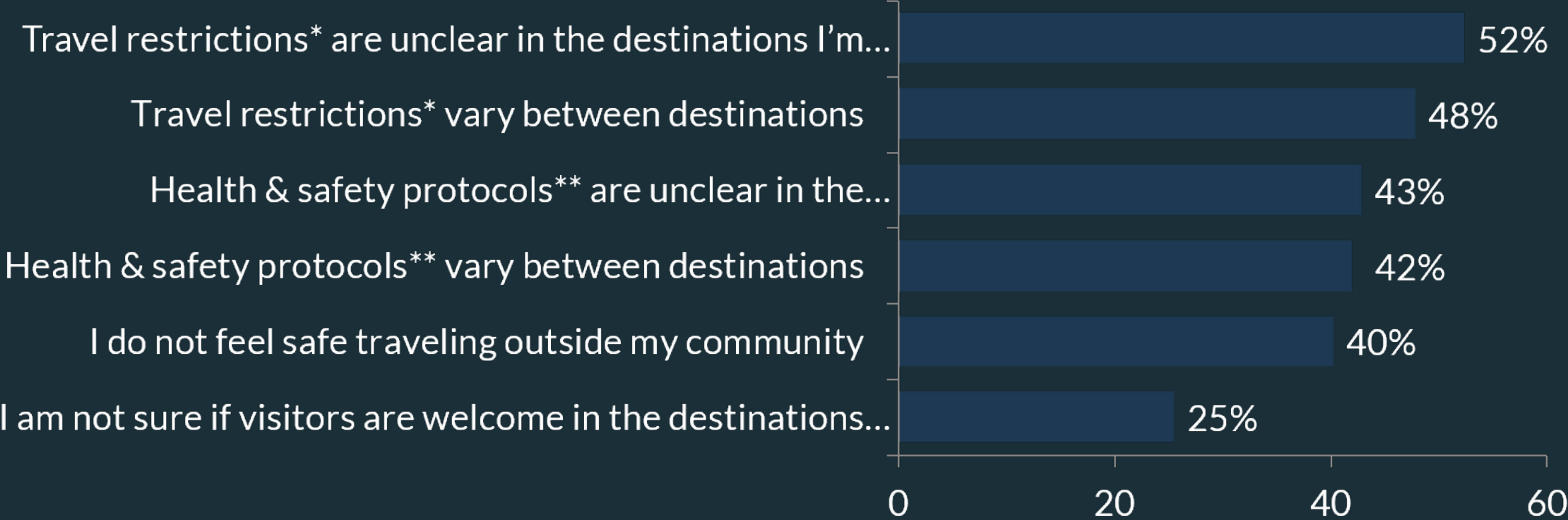




**25%**

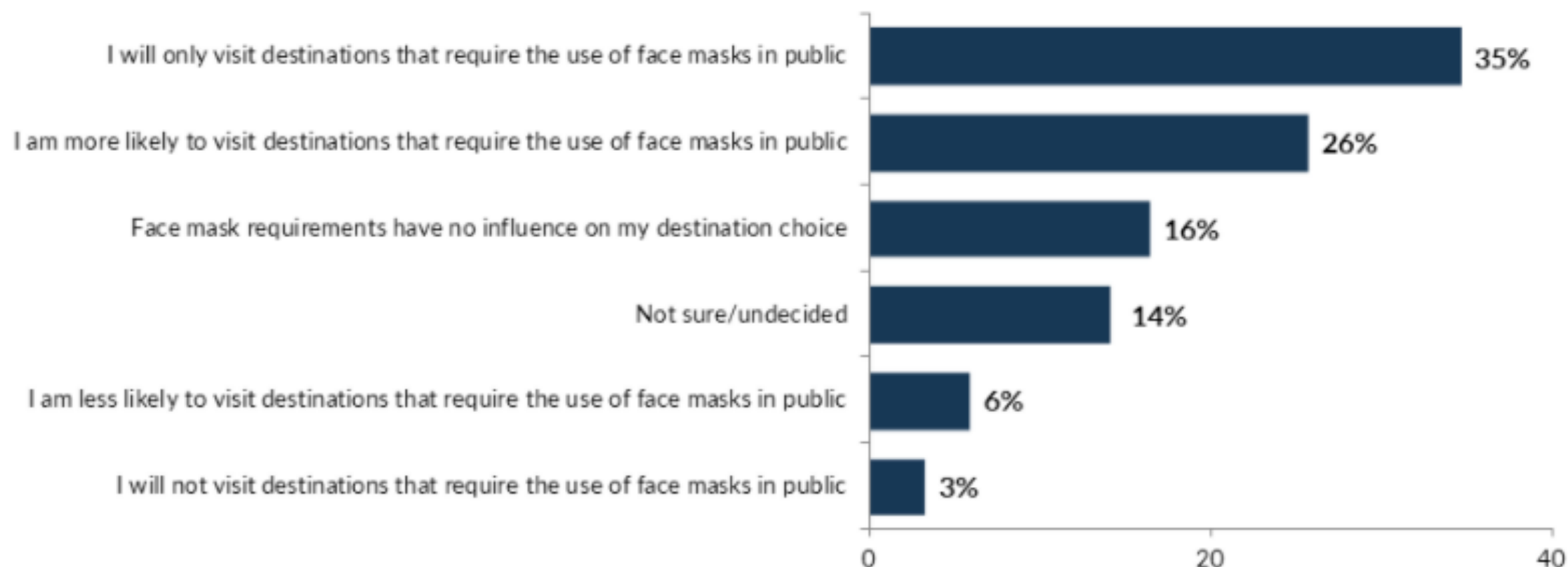
**of American Travelers  
consider themselves  
to be ready to travel  
without hesitation**

### I am hesitant to travel because...



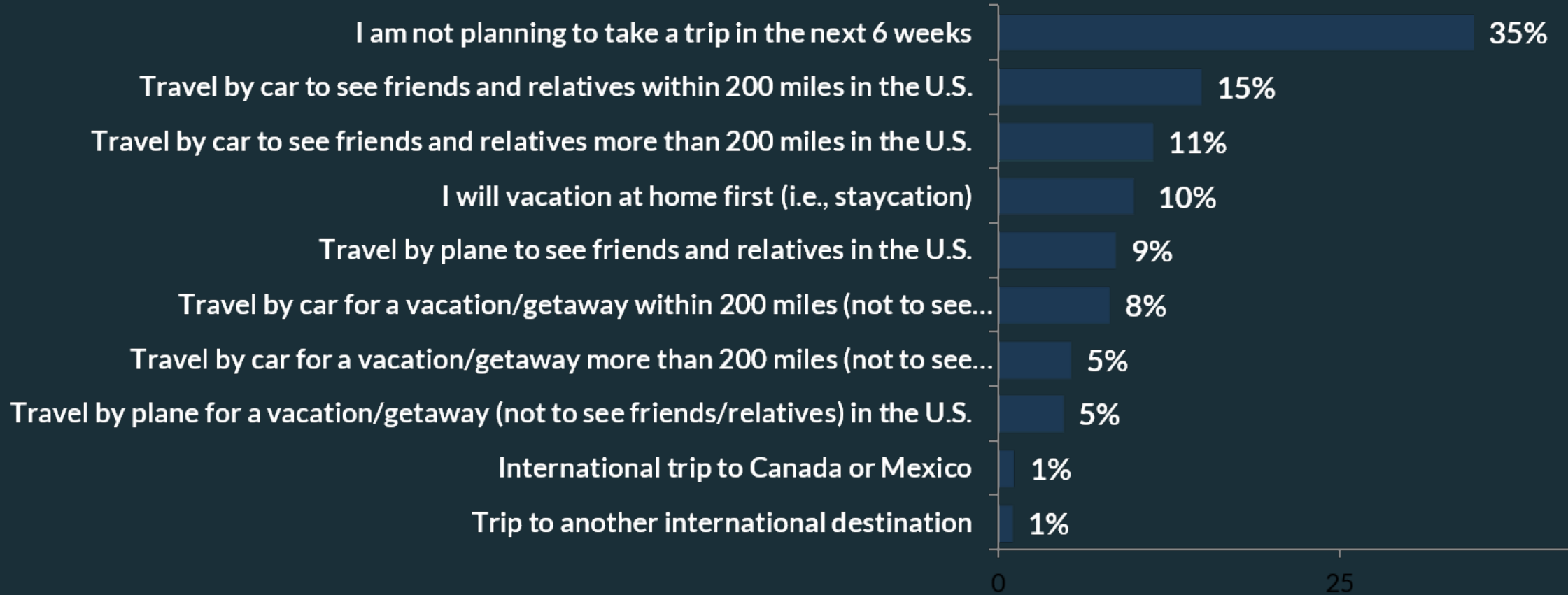
## IMPACT ON TRAVEL PLANS

### Influence of Face Mask Requirements\* on Destination Choices



\* In public where social distancing is not possible

## First Trip Travelers Will Take in the Next Six Weeks





Daily Index YoY

**+ 7.8%**

Sep 02, Wednesday

Last 7 Days YoY

**- 28.5%**

Aug 27 - Sep 02

Last 30 Days YoY

**- 18.4%**

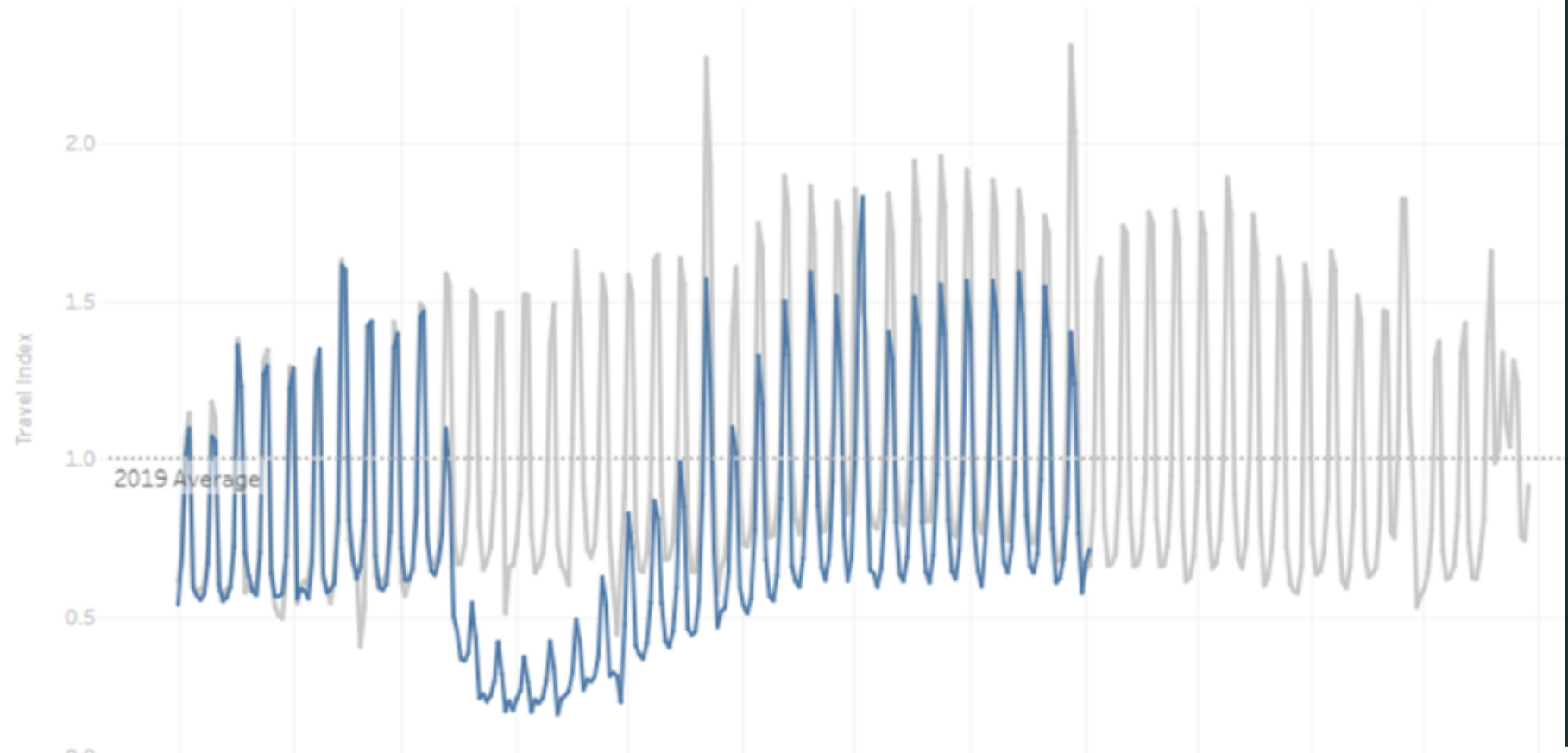
Aug 04 - Sep 02

Show Period:

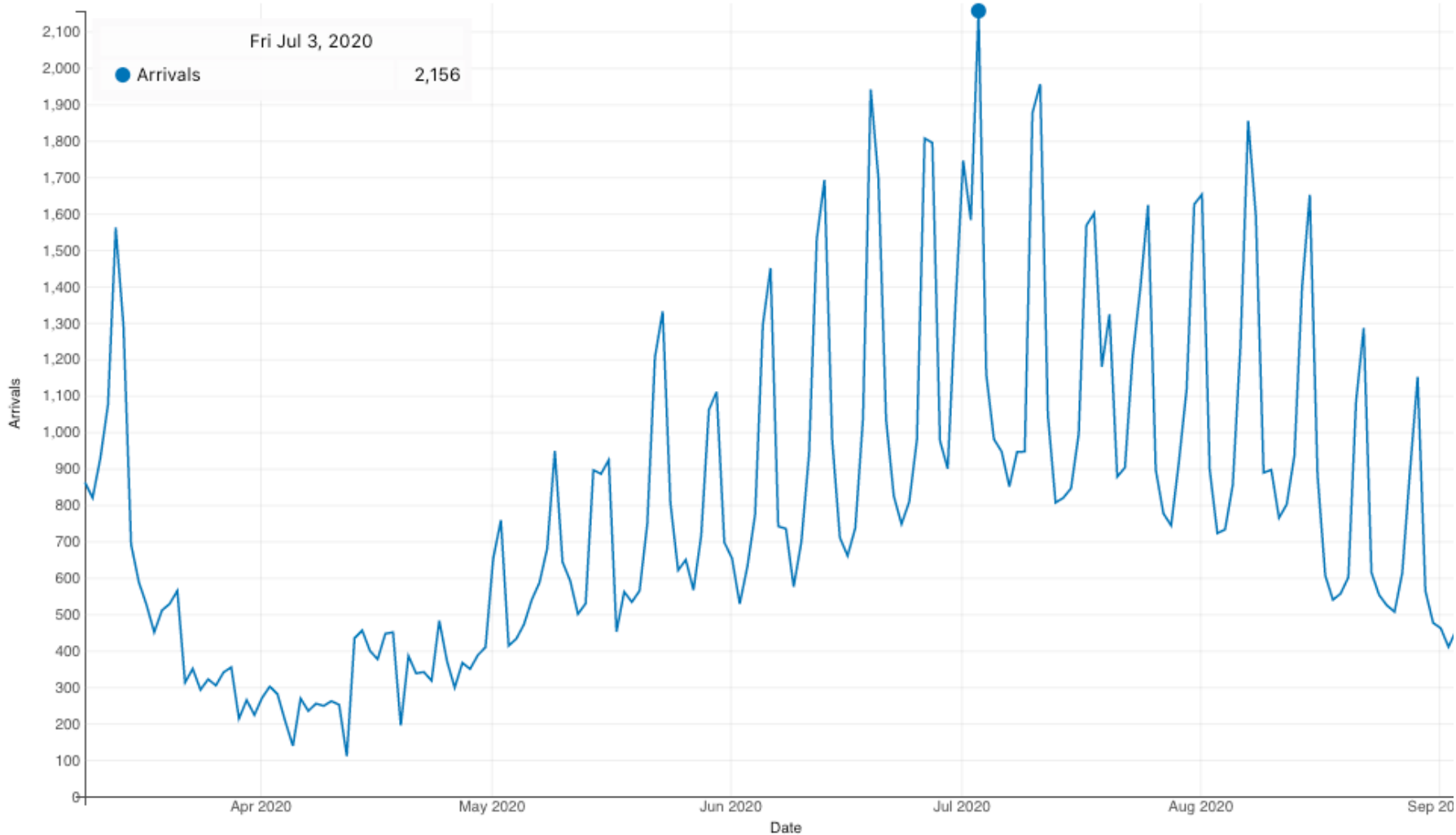
Year to Date

Show View:

Daily



## Daily Arrivals ⓘ

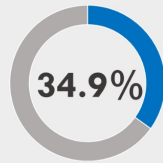


## Top Origins

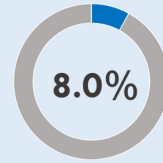
Origin	Visitors
Knoxville, Tn	5,714
Murfreesboro,	3,072
Nashville, Tn	2,208
Atlanta, Ga	2,121
Cartersville, G	1,492
Marietta, Ga	1,466
Birmingham, A	1,402
Canton, Ga	1,348
Maryville, Tn	1,267
Huntsville, Al	1,249

# HOW AMERICANS TRAVELED IN THE SUMMER OF COVID-19

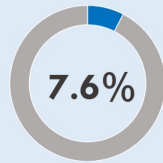
## JUNE 1 – SEPTEMBER 6



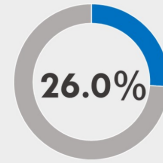
**TOOK A  
LEISURE TRIP**



**TOOK A  
BUSINESS TRIP**



**TRAVELED FOR A  
CONFERENCE EVENT**



**TOOK A  
STAYCATION**

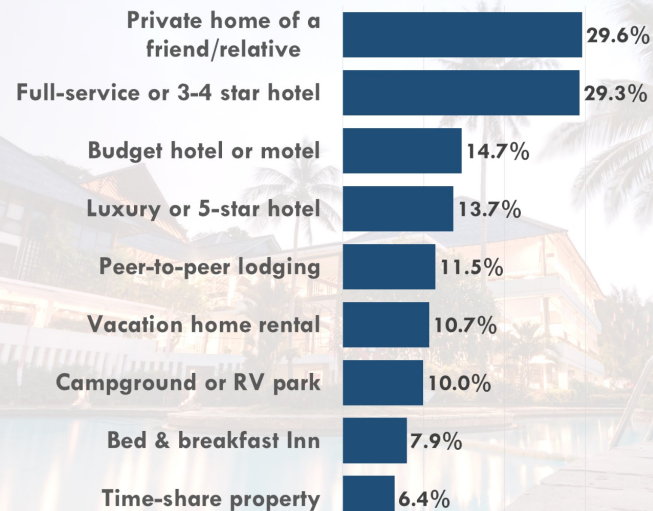


**1.5**

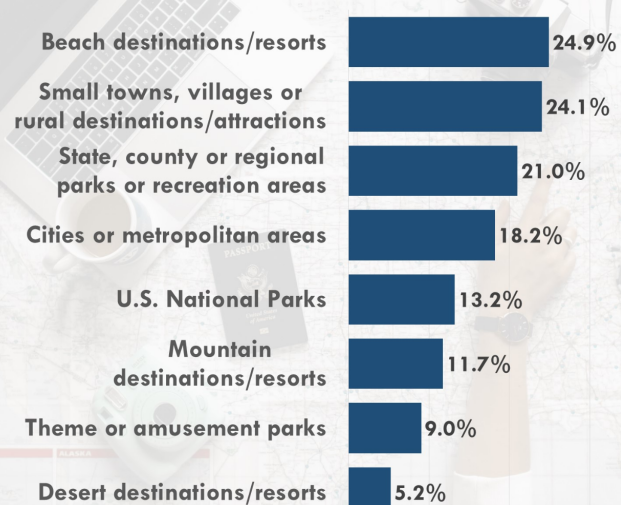
**AVERAGE NUMBER OF OVERNIGHT LEISURE TRIPS**



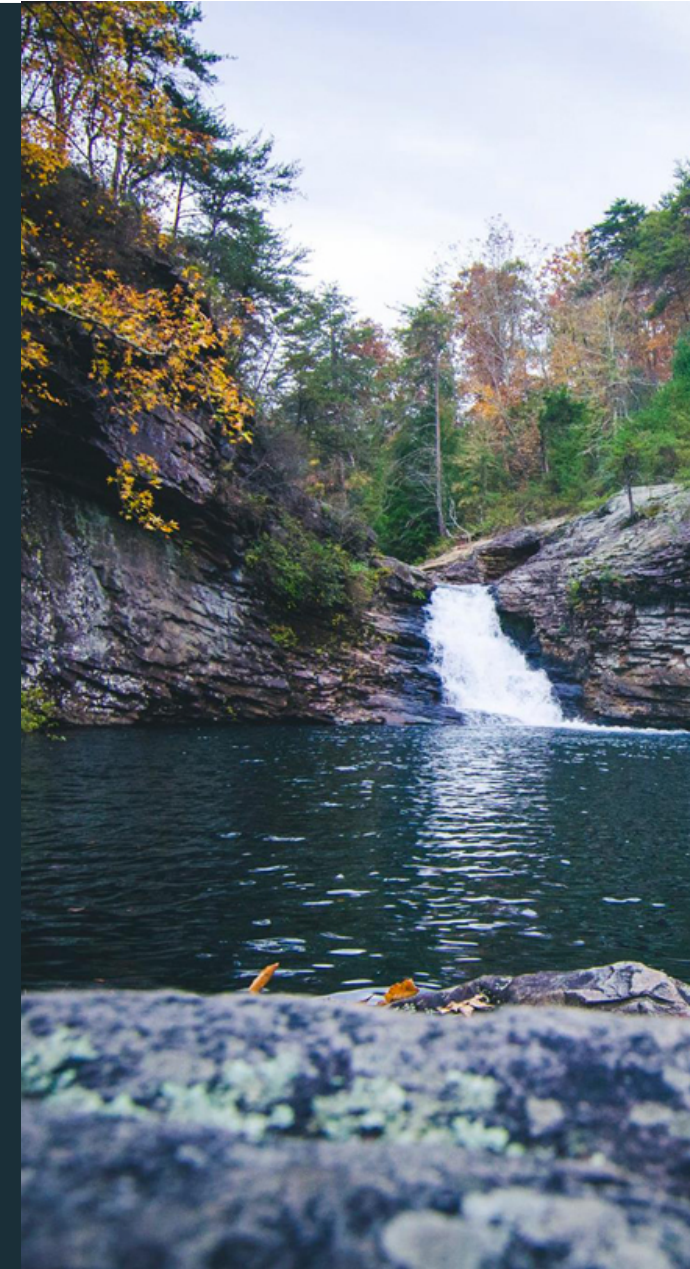
### WHERE THEY STAYED



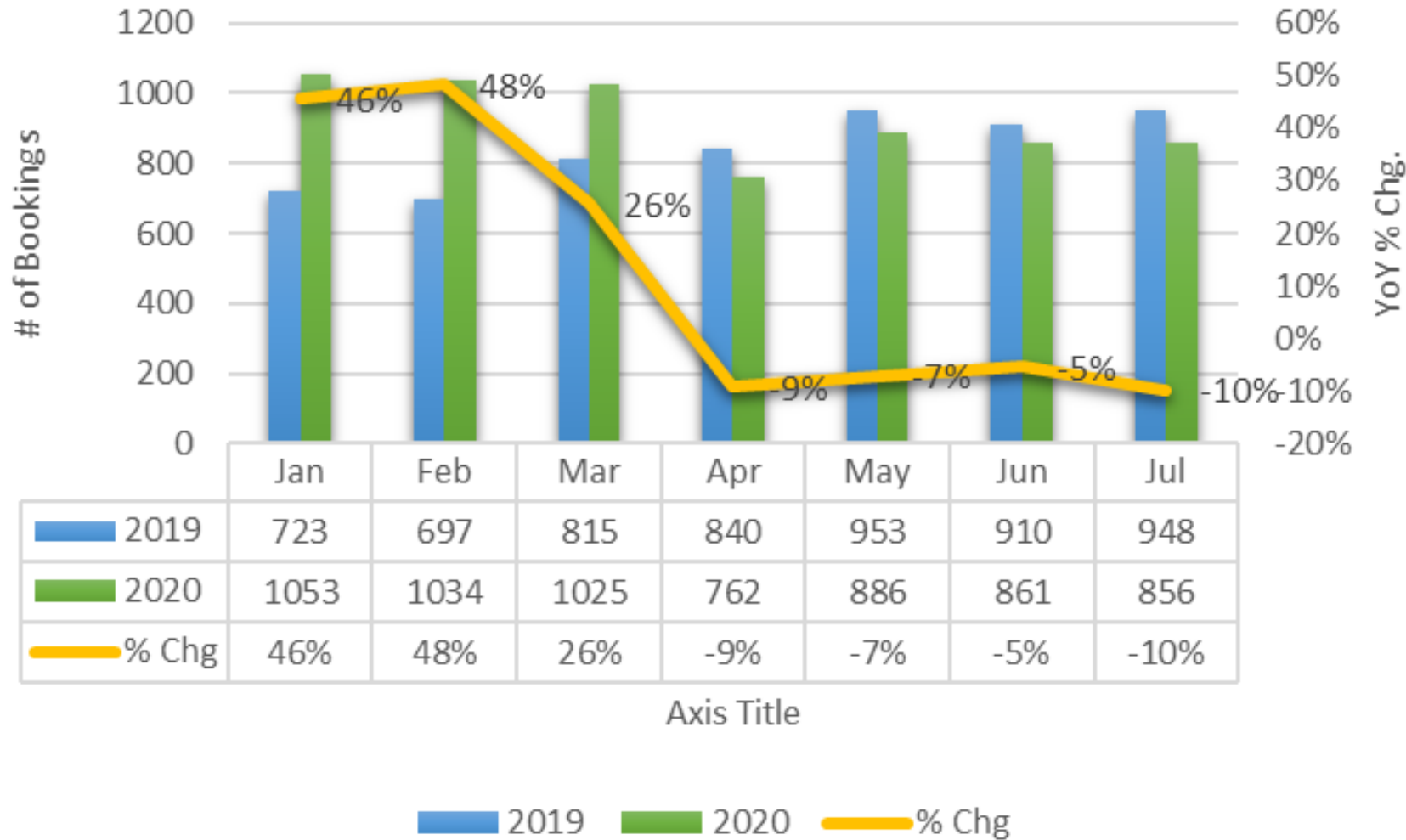
### DESTINATIONS TYPES VISITED



# CHATTANOOGA AREA HOTEL DATA



# Hamilton Co. STVR Bookings

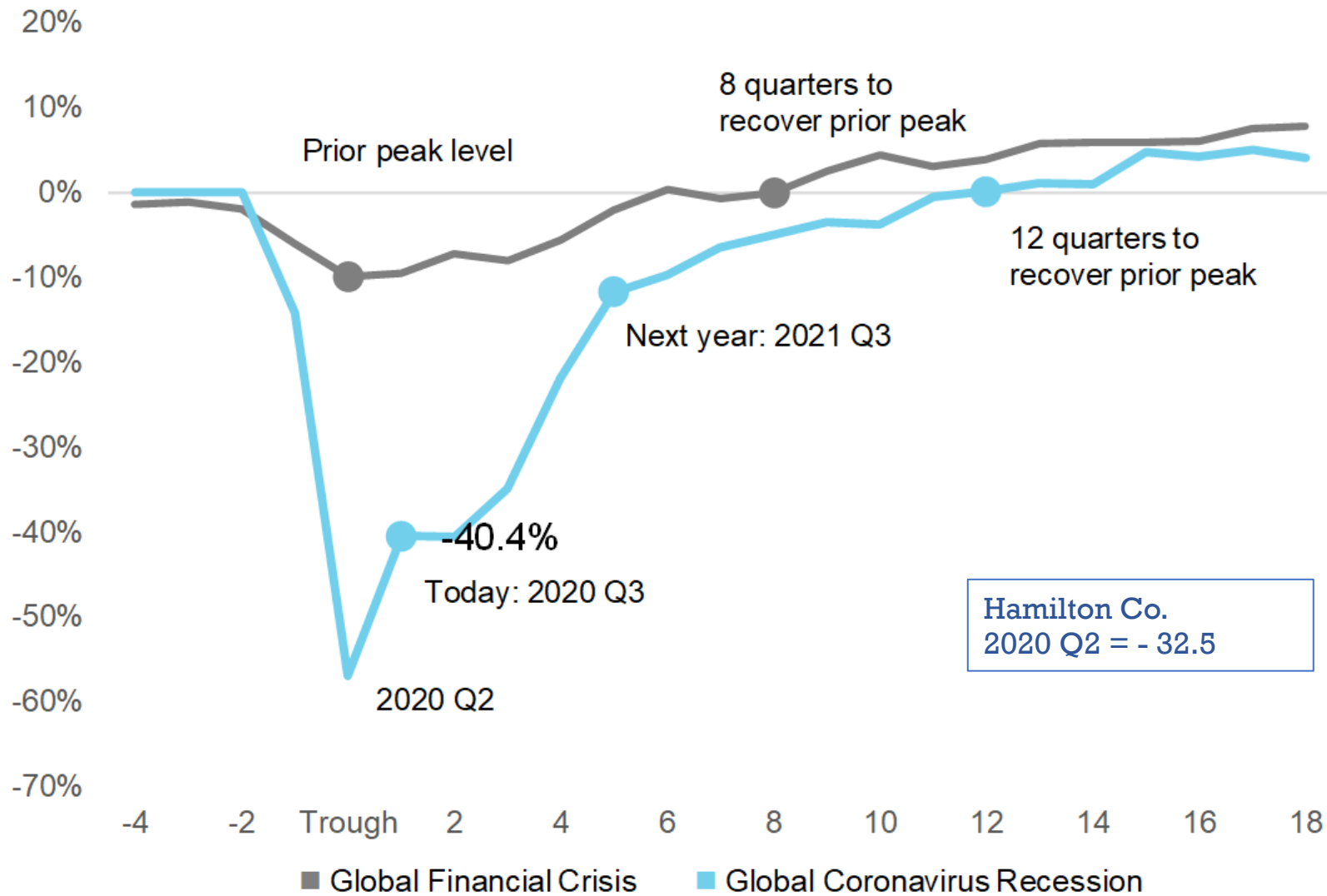


As of July 31<sup>st</sup>

Source: AirDNA

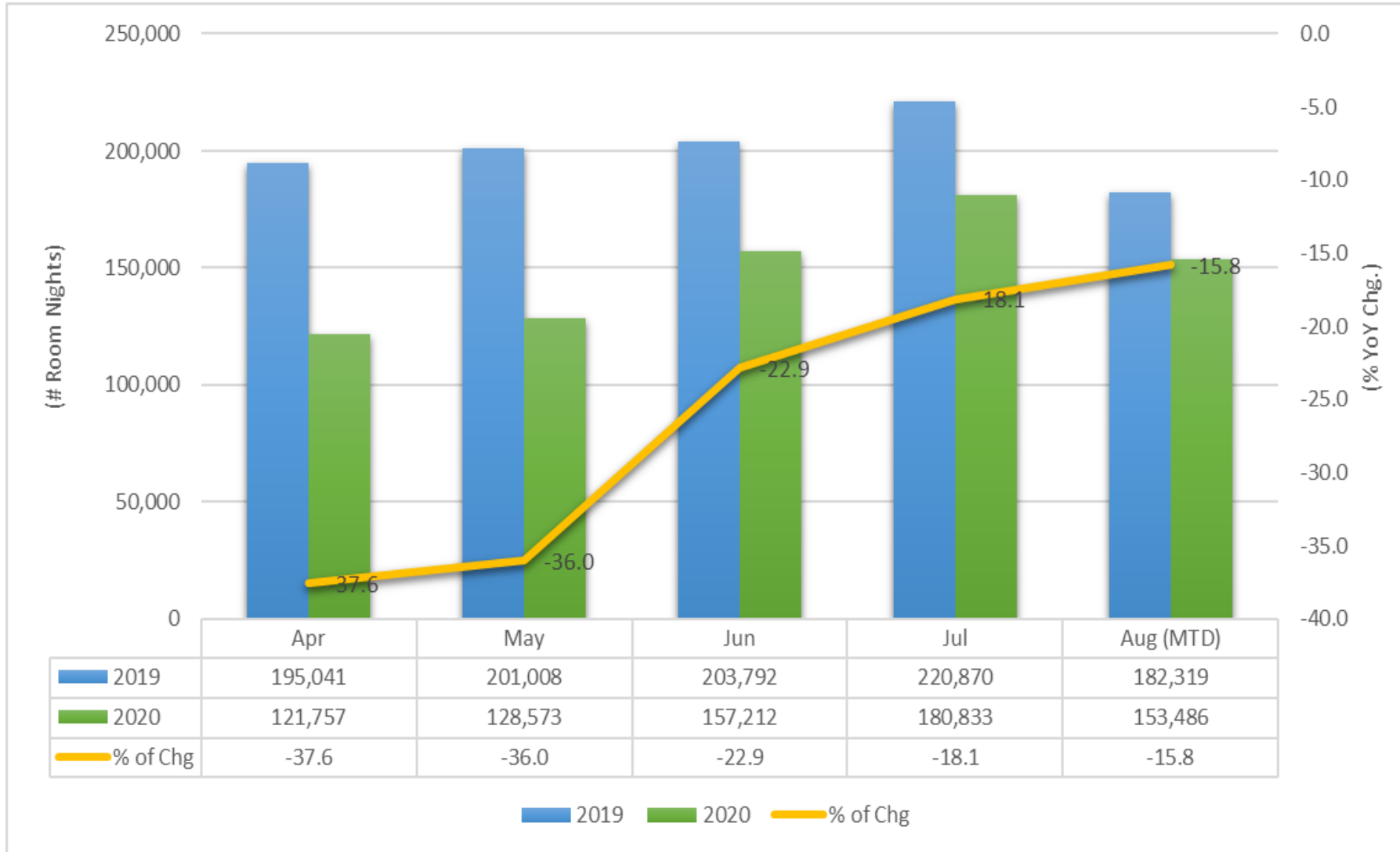
# Room demand: US

Quarters relative to trough, level relative to prior peak



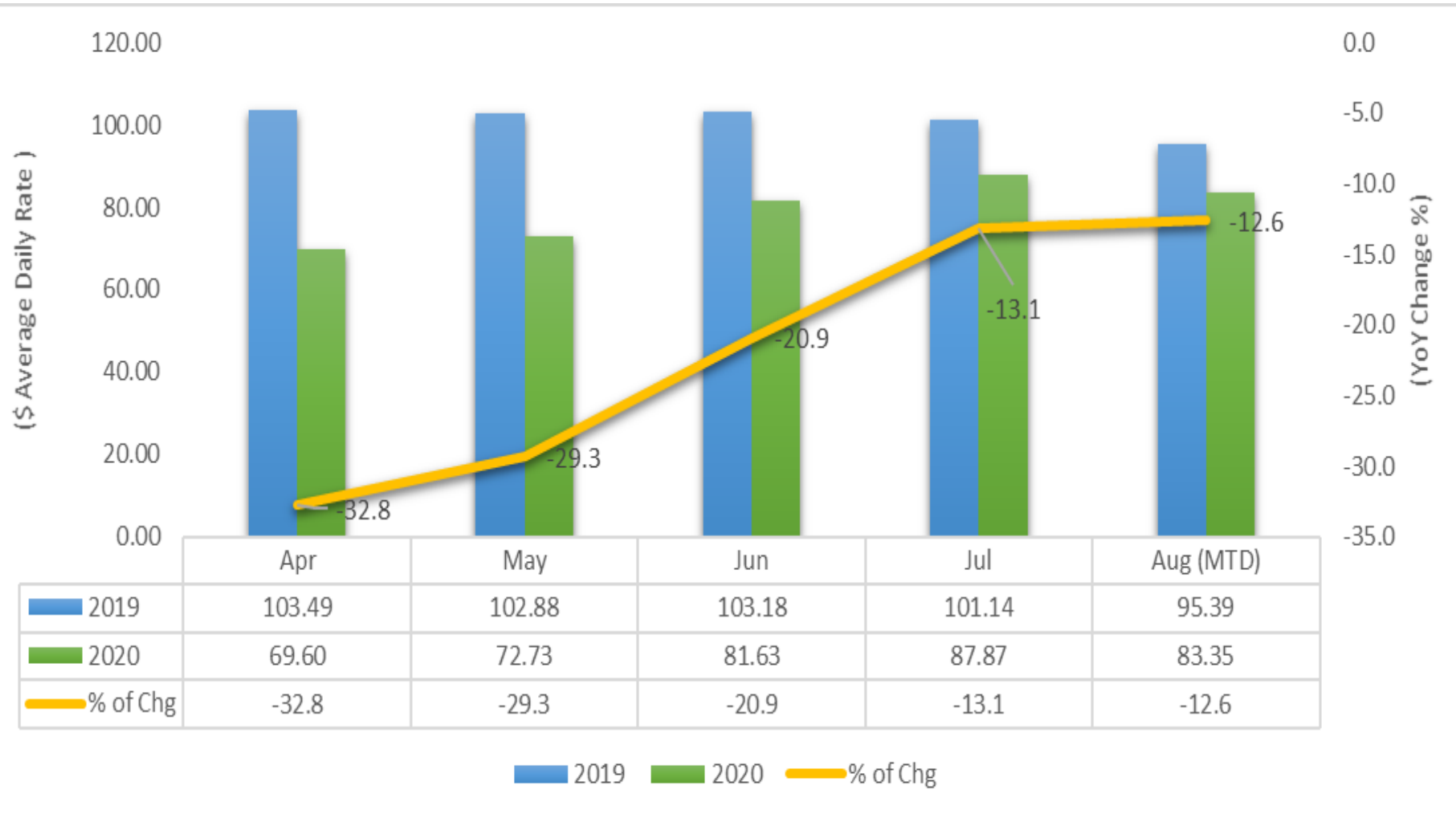
# Hamilton Co. Hotel Room Demand

As of August 29<sup>th</sup>

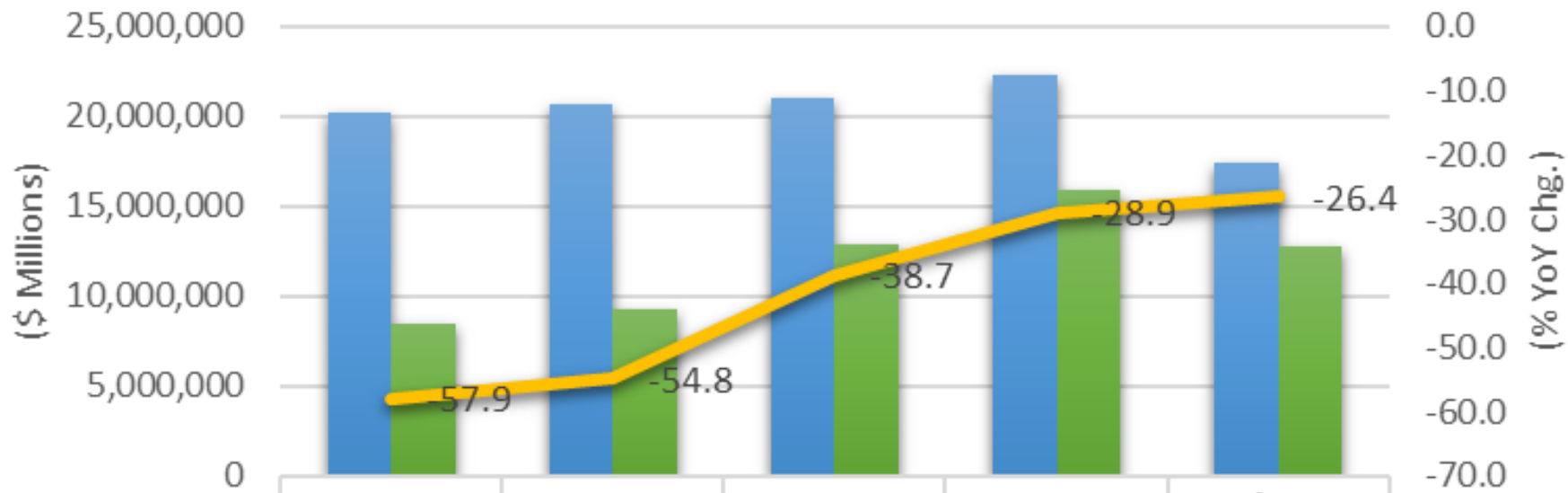


# Hamilton Co. Average Daily Hotel Rate

As of August 29<sup>th</sup>







	Apr	May	Jun	Jul	Aug (MTD)
2019	20,185,255	20,680,425	20,991,276	22,338,156	17,392,048
2020	8,508,073	9,343,196	12,863,243	15,889,069	12,792,414
% of Chg	-57.9	-54.8	-38.7	-28.9	-26.4

■ 2019   
 ■ 2020   
 — % of Chg

# Hamilton Co. Hotel Revenue

As of August 29<sup>th</sup>

# Hamilton Co. vs Others

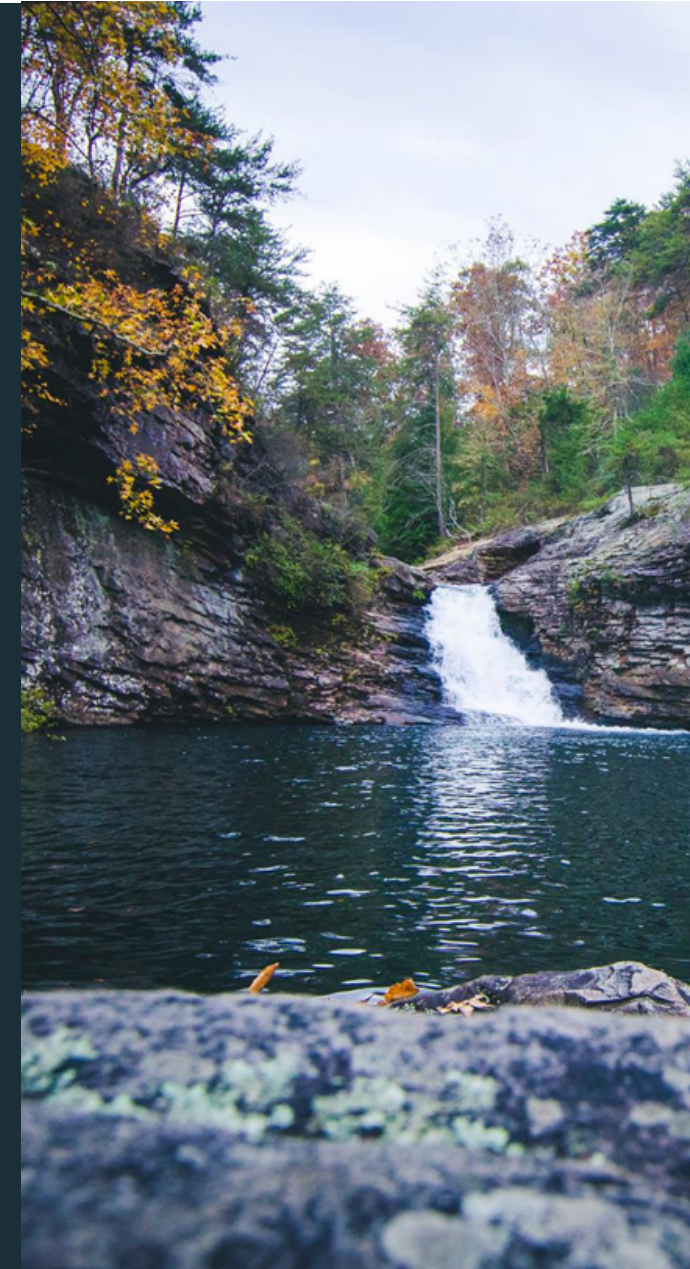
## Hotel Occupancy YTD

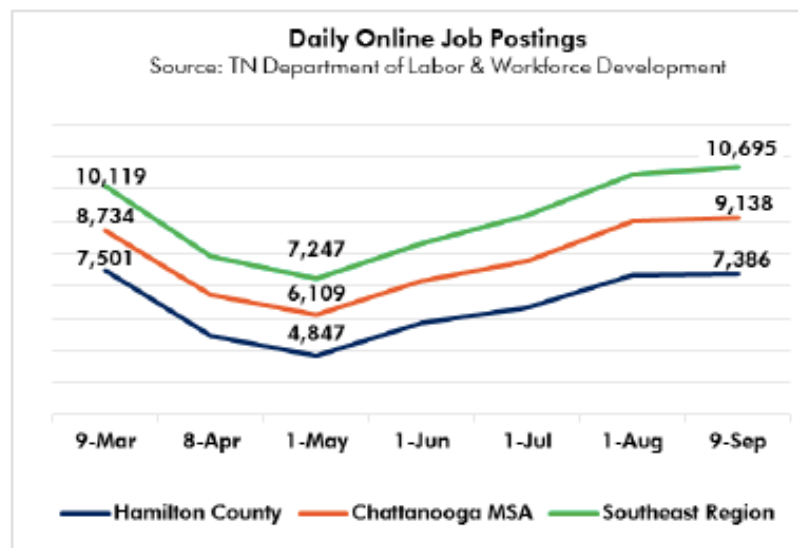
As of July 31<sup>st</sup>

Source: STR Inc.

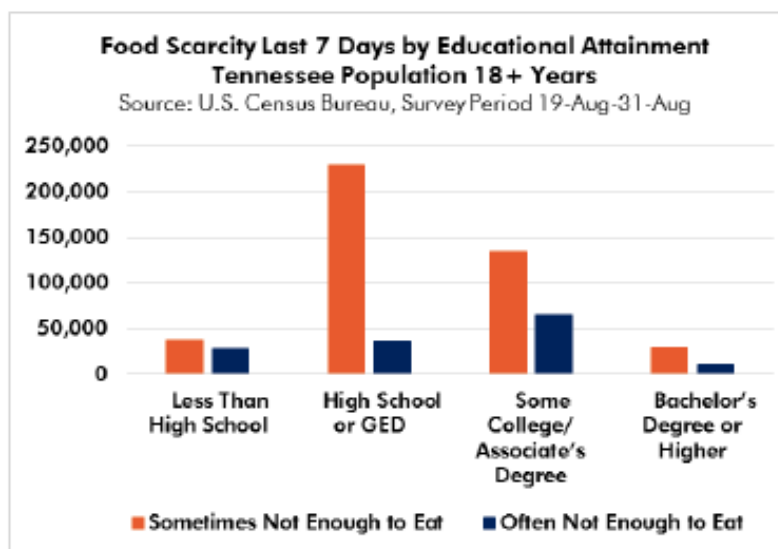
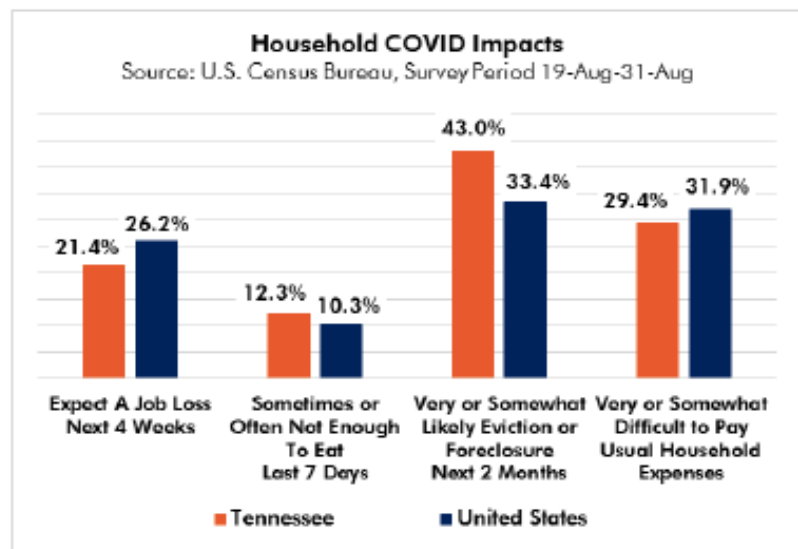
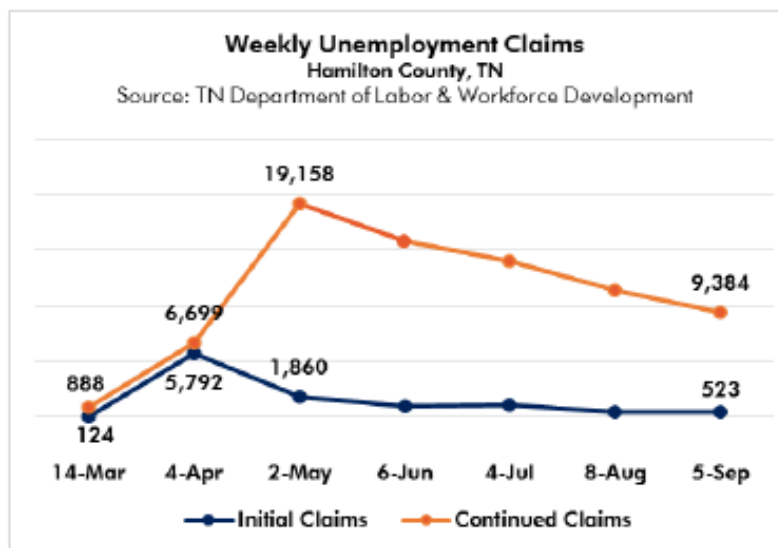
	Occ %	
	2020	2019
United States	43.7	67.0
Hamilton County, TN	50.1	63.1
Asheville, NC	41.0	70.6
Atlanta, GA	47.6	71.6
Birmingham, AL	47.8	69.0
Charleston, SC	47.3	74.9
Knoxville, TN	42.5	62.4
Nashville, TN	42.8	74.2
Orlando, FL	47.4	79.7
Gatlinburg/Pigeon Forge, TN	42.1	61.3
Greenville, SC	45.1	68.1
Savannah, GA	48.6	74.1
Lexington, KY	34.6	61.4

# CHAMBER COLLECTED COVID IMPACT DATA





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



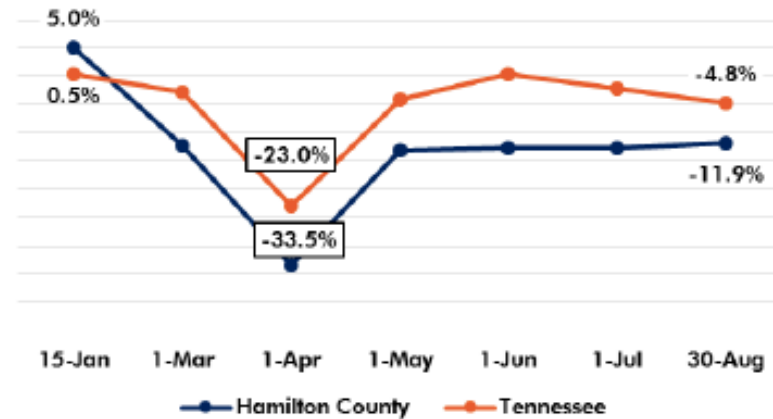
Monthly Jobs by Sector for July - Chattanooga MSA

Source: U.S. Bureau of Labor Statistics

Sector	2019	2020	Change	% Change
Leisure & Hospitality	31,600	29,400	-2,200	-7.0%
Wholesale Trade	8,500	8,000	-500	-5.9%
Mining, Logging & Construction	11,500	11,000	-500	-4.3%
Manufacturing	34,300	33,900	-400	-1.2%
Retail Trade	27,300	27,000	-300	-1.1%
Information	2,300	2,100	-200	-8.7%
Transportation, Warehousing & Utilities	17,600	17,400	-200	-1.1%
Professional & Business Services	27,900	27,700	-200	-0.7%
Other Services	12,500	12,700	200	1.6%
Government	35,300	35,600	300	0.8%
Financial Activities	22,000	23,300	1,300	5.9%
Education & Health Services	34,100	36,100	2,000	5.9%
<b>TOTAL</b>	<b>264,900</b>	<b>264,200</b>	<b>-700</b>	<b>-0.3%</b>

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

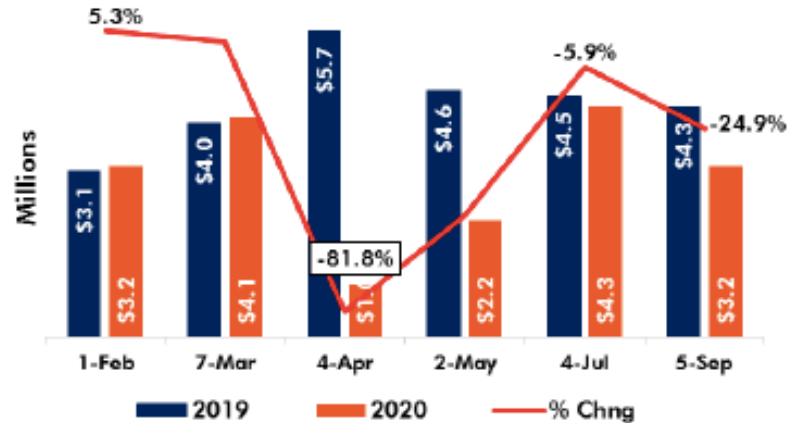
Sources: Affinity Solutions; Harvard et al



Weekly Hotel Revenue and % Change

Hamilton County, TN

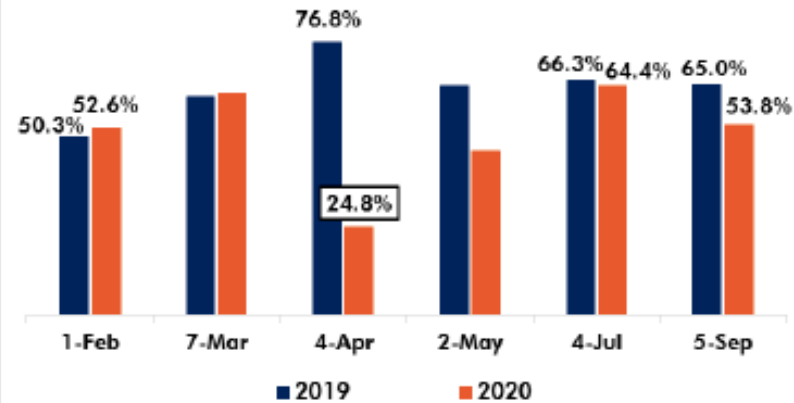
Sources: STR, Inc., STR Global, Ltd.; Chattanooga Tourism Company



Weekly Hotel Occupancy Rate

Hamilton County, TN

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



**Daily Social Distancing Scoreboard**

Hamilton County, TN

Source: Unacast

<b>Composite Score</b>		<b>F</b>
Reduction in Average Mobility (Based on Distance Traveled)	Less than 25%	<b>F</b>
Reduction in Non-Essential Visits	Less than 55%	<b>F</b>
Reduction in Potential Human Encounters (Compared to National Baseline)	Less than 40%	<b>F</b>

Methodology available: unacast.com, data as of 9-Sep

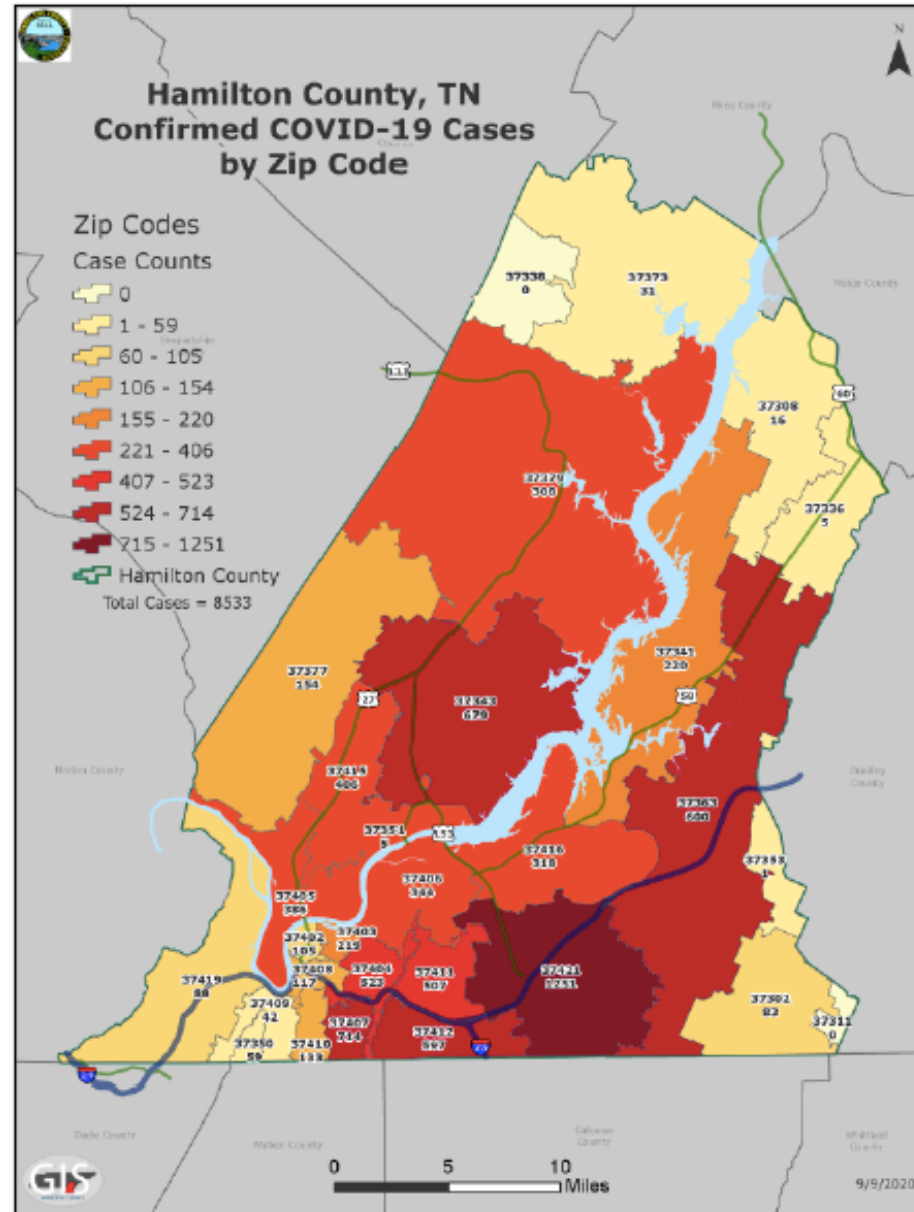
**Daily COVID-19 Testing and Outcomes**

Hamilton County, TN

Source: Hamilton County Department of Health

	As of 8-Apr*	As of 9-Sep	Change 8-Apr-9-Sep
Positive	97	8,533	8,436
Deaths	9	82	73
<b>Positive Cases - Demographics</b>			
Male	55	4,177	4,122
Female	42	4,335	4,293
Unknown	0	21	21
White	74	4,408	4,334
Black	18	1,728	1,710
Asian	3	117	114
Other	1	638	637
Unknown	1	1,642	1,641
Hispanic	4	2,083	2,079
Non-Hispanic	92	6,104	6,012
Unknown	1	346	345
0-10 years old	3	624	621
11-20	2	1,320	1,318
21-30	6	1,957	1,951
31-40	10	1,524	1,514
41-50	19	1,117	1,098
51-60	22	977	955
61-70	18	586	568
71+	17	396	379
Unknown	0	32	32

\*Benchmark: Hispanic ethnicity first published



●13-Mar - first known case of COVID-19 reported

●1-Jul - 8-Oct - mask mandate in effect

# Contact

For additional information please contact:

[Dave@chattanoogaatourism.com](mailto:Dave@chattanoogaatourism.com)

For tourism recovery indicators

[Brian@chattanoogaatourism.com](mailto:Brian@chattanoogaatourism.com)

For accommodations data

[Mhamilton@ChattanoogaChamber.com](mailto:Mhamilton@ChattanoogaChamber.com)

Miriam Hamilton, Chattanooga Chamber

For economic indicators



# CHATTA NOOCCA TOURISM CO.