

Chattanooga Domestic Visitation Highlights & American Traveler Sentiment

ANNA BLOUNT
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WHO WE ARE

Established in 1978 as a market research consultancy

Headquartered in Columbus, OH and Toronto, ON

Focused in tourism since 1985

Working with over 150 Destinations and Brands





AGENDA

- Chattanooga Domestic Visitation Highlights
- Traveler Sentiment & Future Indicators
- Questions



706

2020 Chattanooga
overnight & day trips

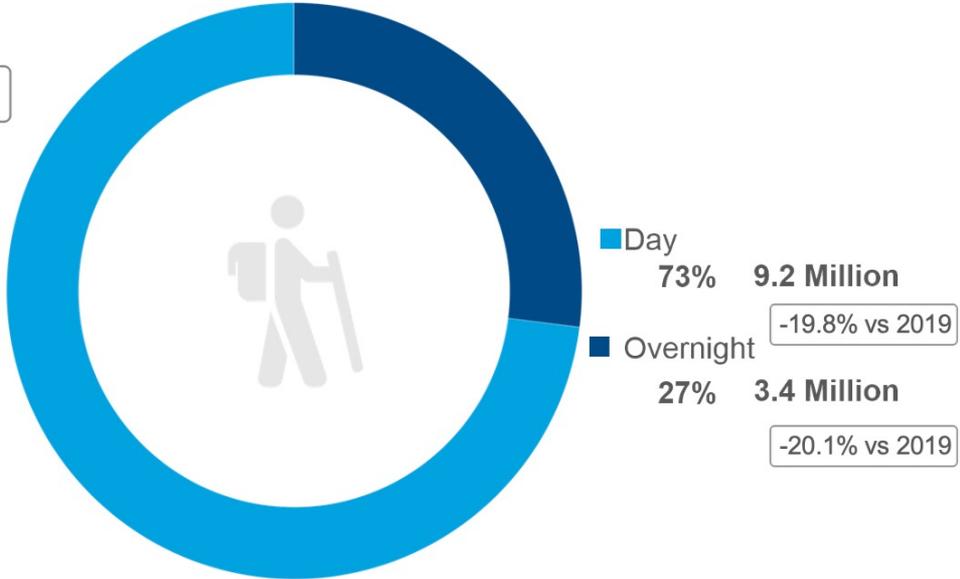
2020 Chattanooga Overnight Trips Size of Domestic Visitation Market



Total Person-Trips

12.6 Million

-19.9% vs. last year



2020 Chattanooga Overnight Trips Main Purpose of Trip



37%
Visiting friends/ relatives



2%
Conference/
Convention



16%
Touring



5%
Other business trip



10%
Outdoors



7%
City trip



7%
Business-Leisure

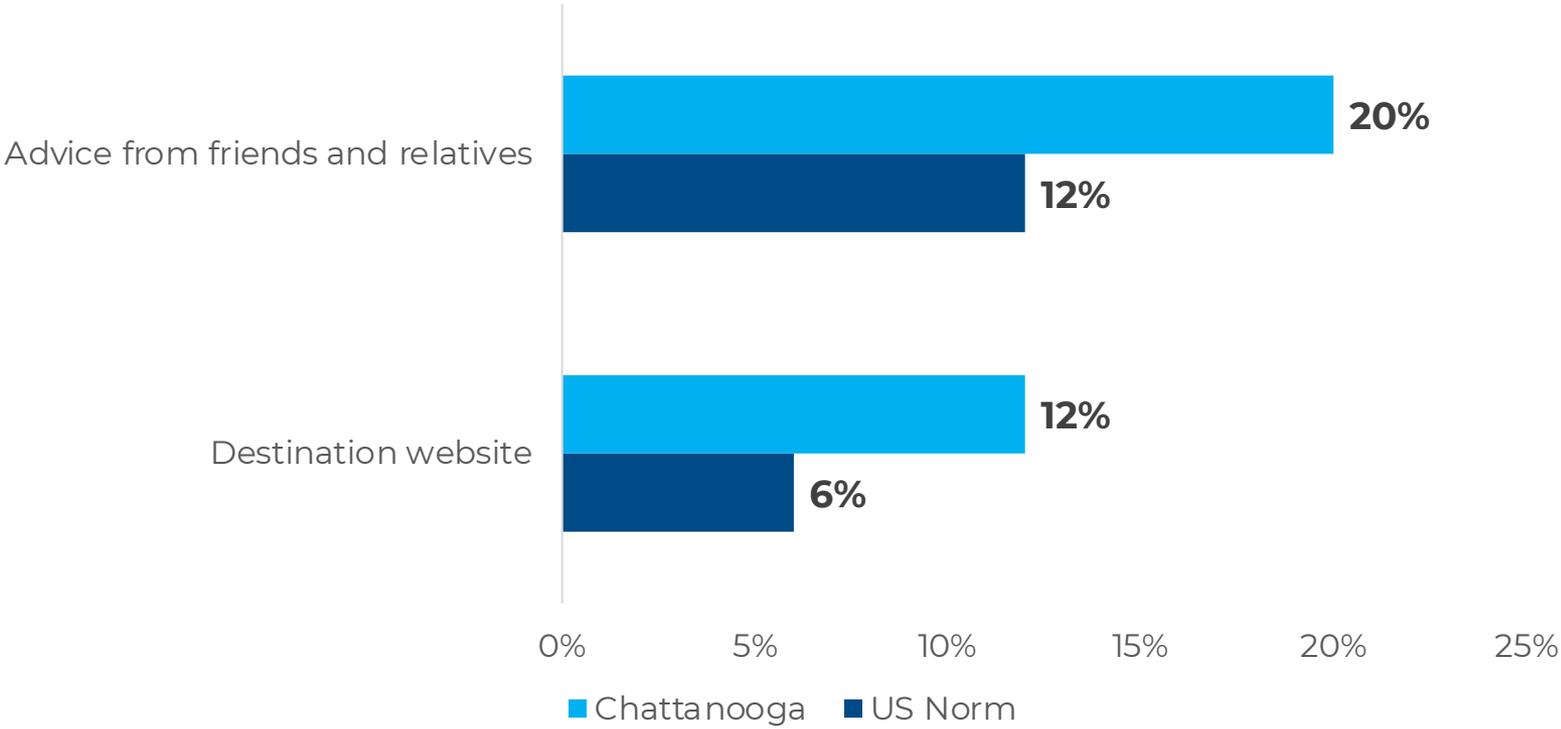
- 5 pts
vs 2019



6%
Special event

+ 4 pts
vs 2019

2020 Chattanooga Overnight Trips Trip Planning Information Sources



2020 Chattanooga Overnight Trips Activity Categories

Outdoor Activities



59%

U.S. Norm: 48%

Cultural Activities



42%

U.S. Norm: 26%

Entertainment Activities



68%

U.S. Norm: 53%

Chattanooga Overnight Trips Activities



Sightseeing

31%



Attending celebration

14%



Shopping

30%



Hiking/backpacking

14%



Landmark/historic site

28%



Museum

14%



National/state park

19%



Aquarium

14%



Local park/playground

16%



Swimming

13%



CHATTANOOGA
TOURISM CO.

2020 Longwoods Travel USA®

2020 Chattanooga Overnight Trips Food Types on Trip

	Chattanooga	U.S. Norm
 Unique/local food	50%	40%
 Fine/upscale dining	26%	20%
 Street food/food trucks	23%	19%

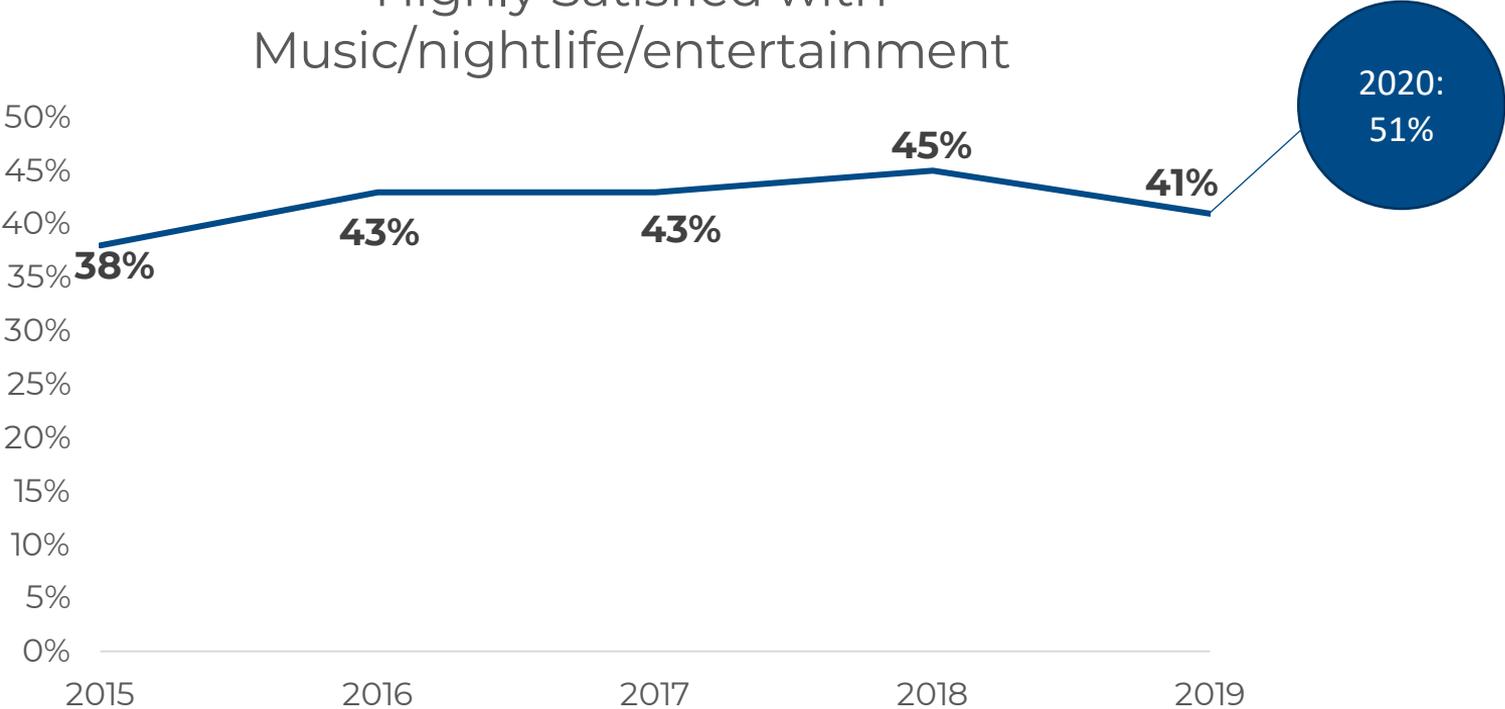
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2020 Chattanooga Overnight Trips Satisfaction by Category



Highly Satisfied with Music/nightlife/entertainment



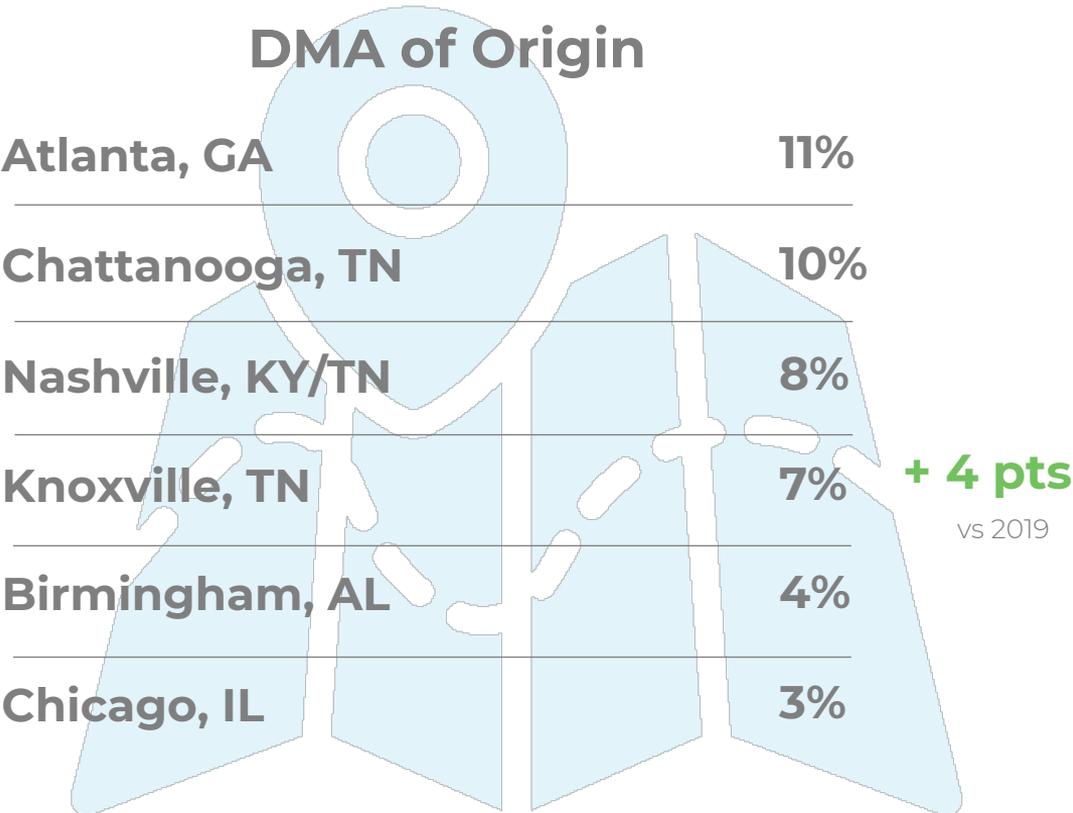
— Music/nightlife/entertainment

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Please note that in 2020 a NA option was added as a response option for this variable.



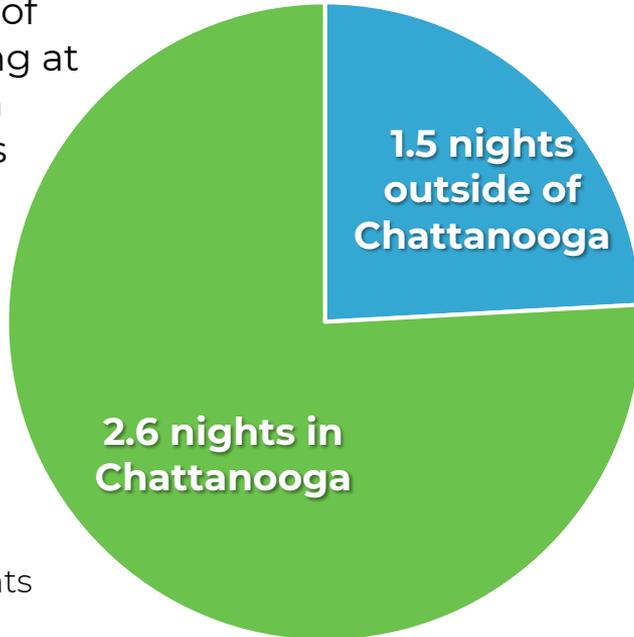
2020 Chattanooga Overnight Trips Origin Markets



2020 Chattanooga Overnight Trips Length of Stay & Hotel/Motel Share

Average Length of Trip: 4.1 Nights

On average, **62%** of each trip including at least one night in Chattanooga was spent there.



+ 0.5 days

from 2017's 2.1 nights

68%

of 2020 overnight visitors to Chattanooga have visited before in the past 12 months

+ 20 pts

vs U.S. norm

2020 Chattanooga Overnight Trips Repeat Visitation & Satisfaction



49%

**of 2020 overnight visitors
to Chattanooga have
visited before in the past
12 months**

57%

2015

46%

H1 2021

71%

**of 2020 overnight visitors to
Chattanooga have
visited before in the past 12
months**

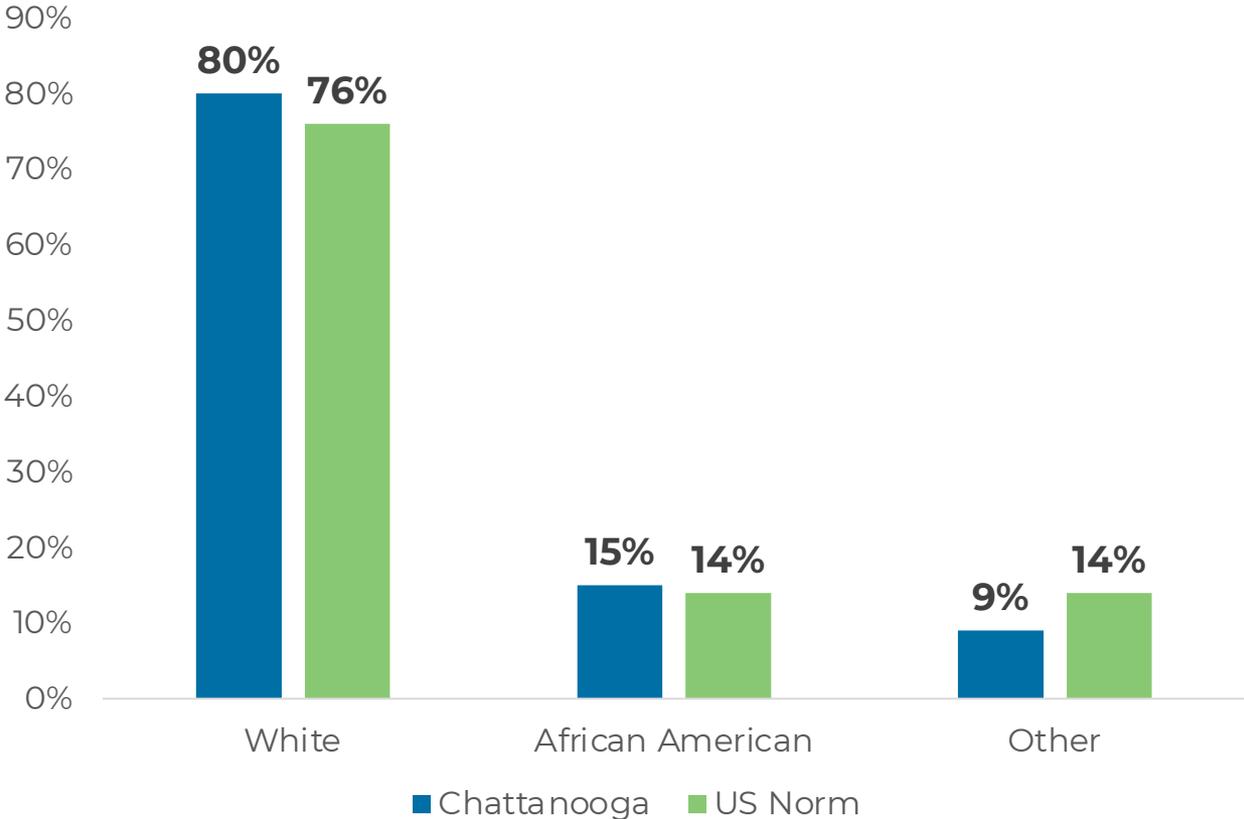
70%

2015

69%

H1 2021

2020 Chattanooga Overnight Trips Race



Key Takeaways

Friends & Relatives

VFR is the main purpose of over 1/3 of Chattanooga's overnight trips, and advice from friends and relatives is Chattanooga's biggest travel influencer – your residents are your brand ambassadors.

Outdoors & Culture

The combination of outdoor and cultural activities Chattanooga offers is registering with travelers, as these activities dominate the top 10.

Longer Trips & Hotels/Motels

The 2.6 days average trip length is a half a day longer than 2017's 2.1 days. Additionally, hotels and motels dominate Chattanooga's accommodation market, outperforming the U.S. norm.

Music & Unique Local Food

Not only are half of visitors trying Chattanooga's unique and local foods, but satisfaction with the city's music and nightlife scene is growing.



EST. MARCH 2020

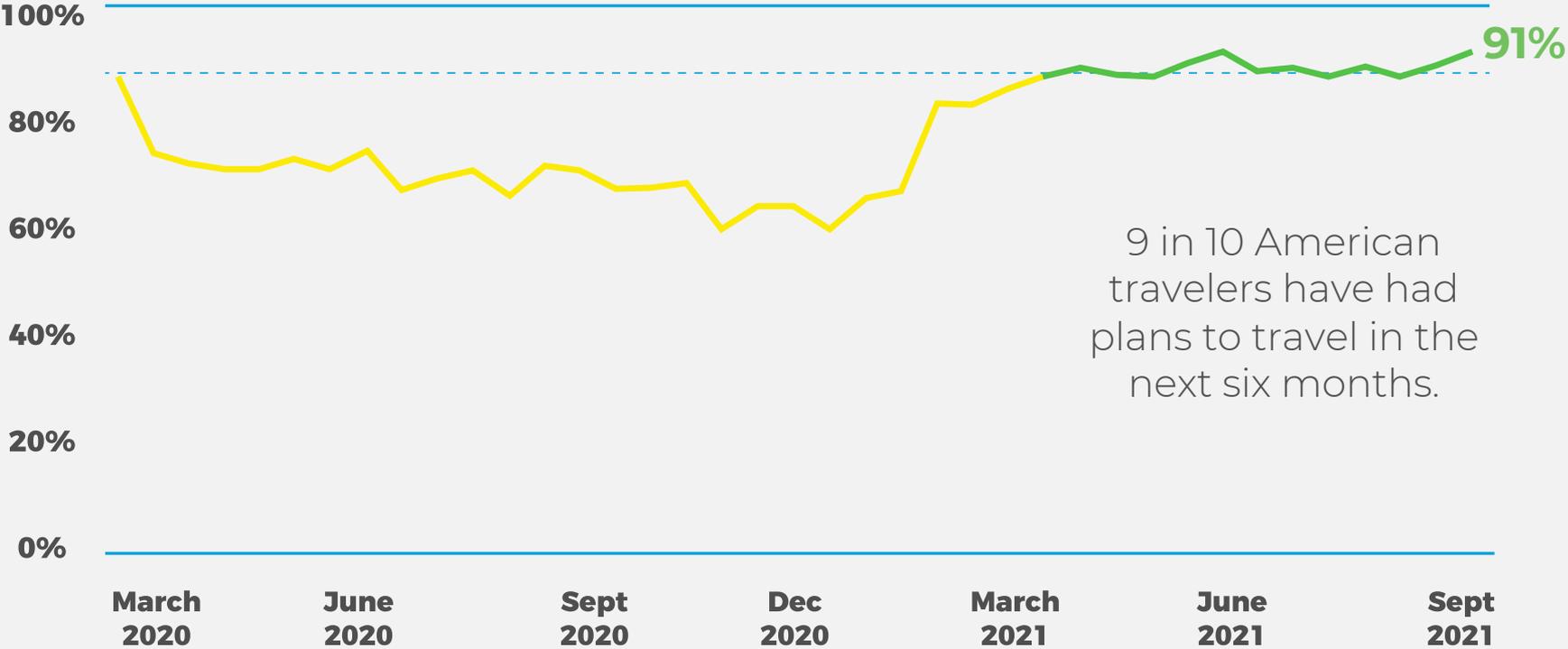
COVID-19 American Travel Sentiment Study Wave 49: October 27th

1. Understand the resident as the traveler for the first time
2. Provide valuable insights to this industry to navigate the pandemic and power the recovery

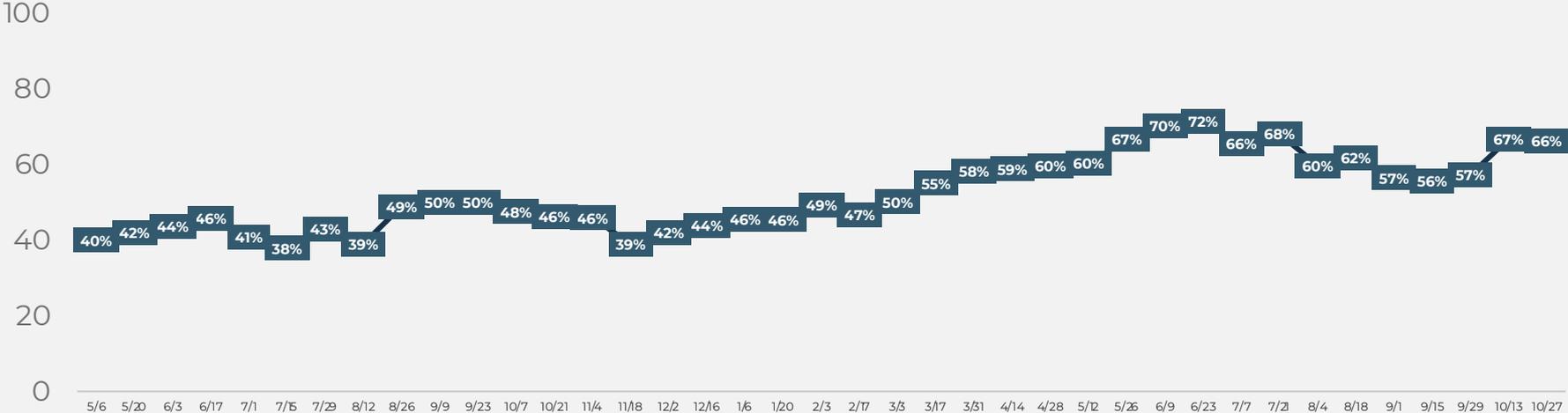
miles
PARTNERSHIP

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INTERNATIONAL

Do Americans intend to travel?



2/3rds of travelers now feel safe traveling outside of their communities



COVID-19 is still influencing travel decisions

28% are choosing drive
rather than fly destinations

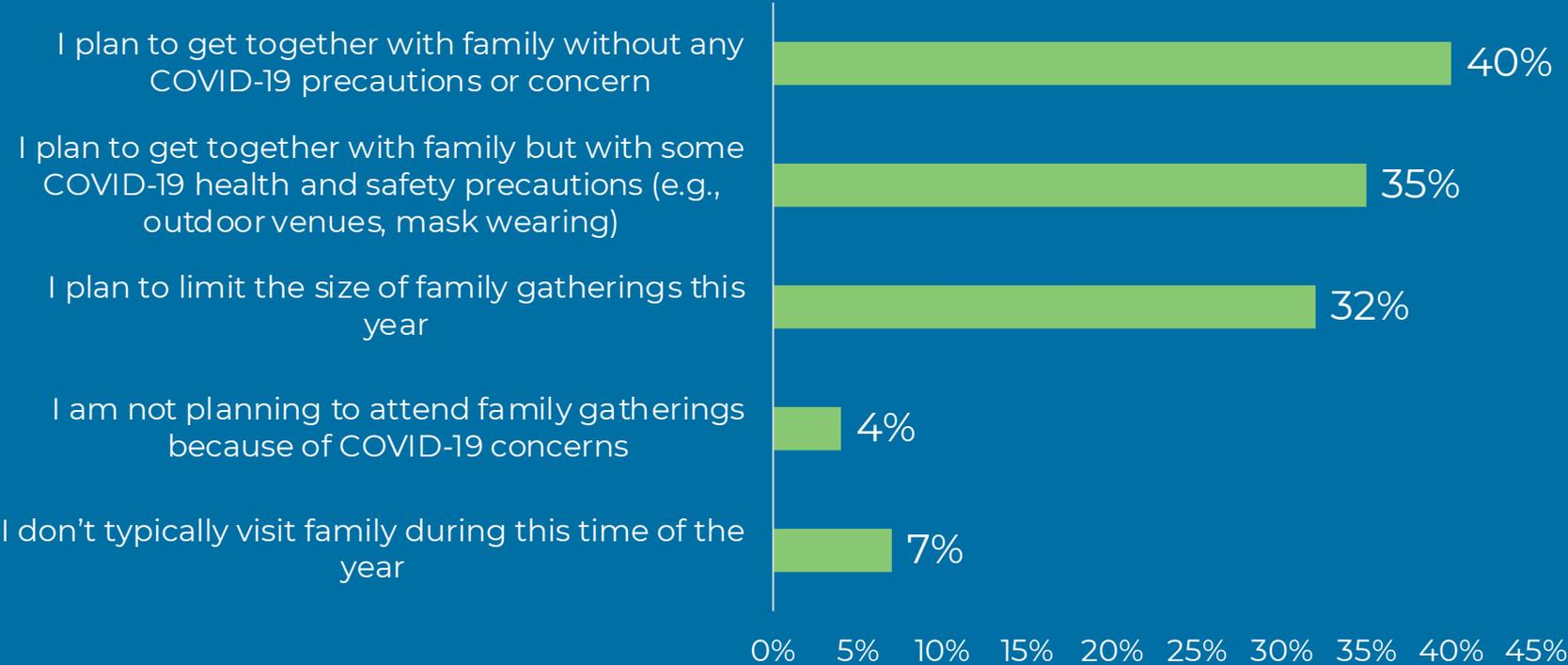
27% are reducing the
numbers of trips they'll take

16% are choosing rural
over city destinations

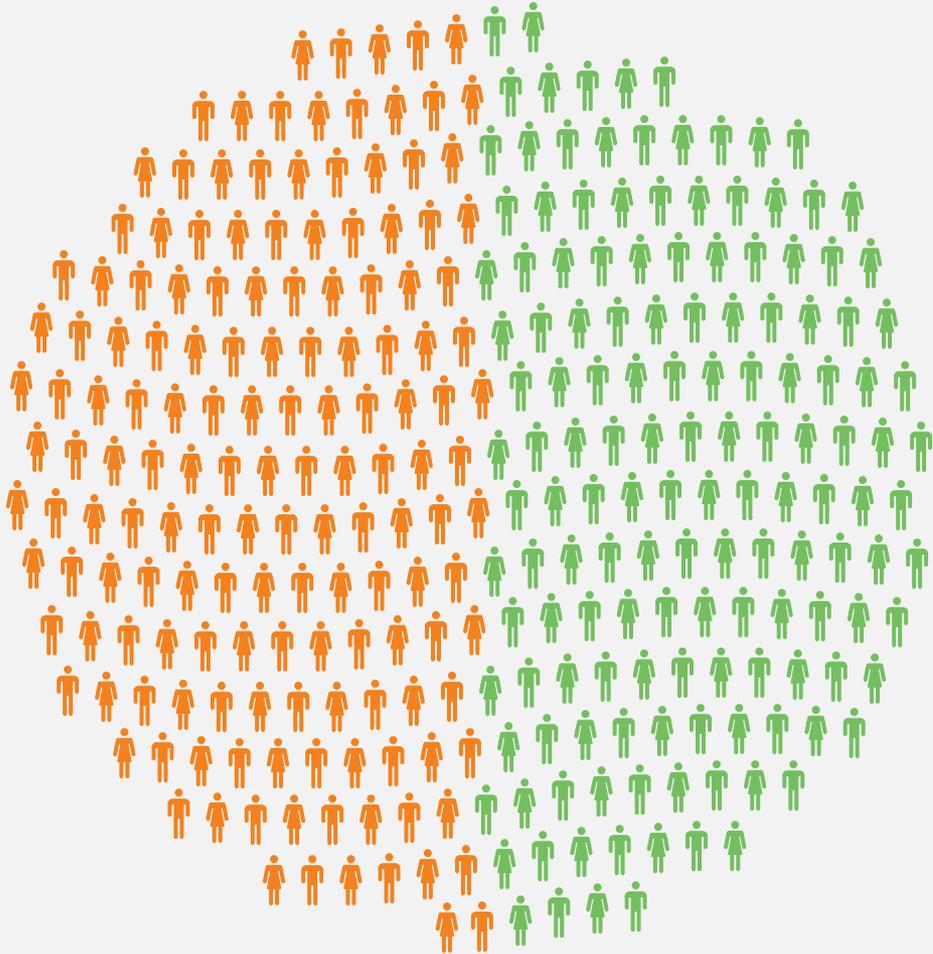
Only **6%** are canceling trips



Travelers are Planning to Gather with Family this Fall/Winter Season



Americans are split on the importance of clear health & safety protocols



44%

NO restrictions
are important

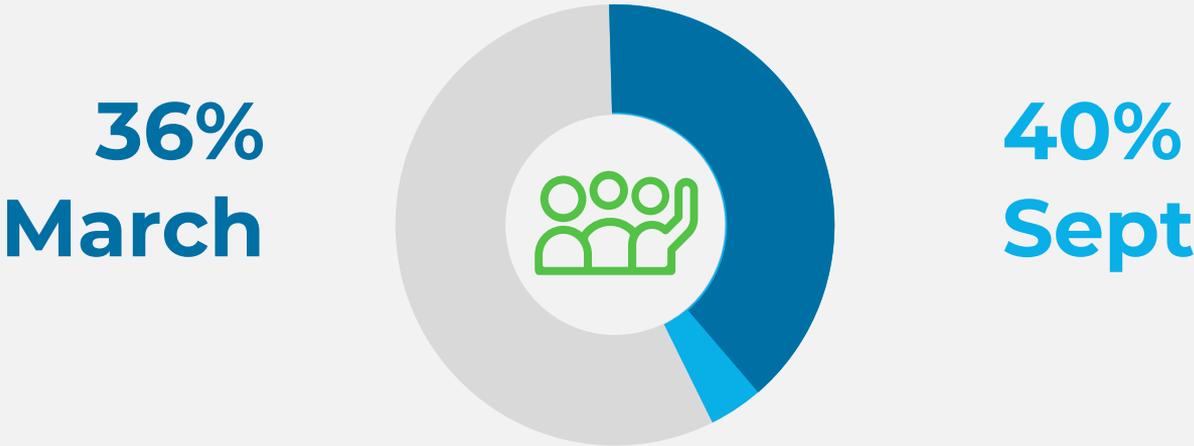
51%

Clear health and
safety protocols
at a destination
are important

43%

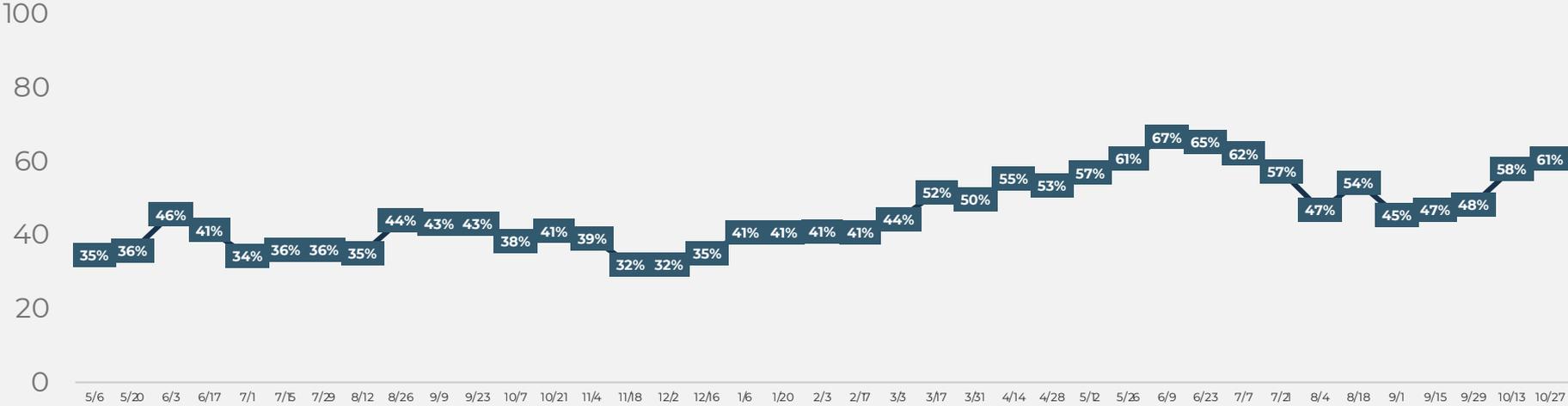
Mask wearing
requirements
are important

Support for opening communities to visitors is key

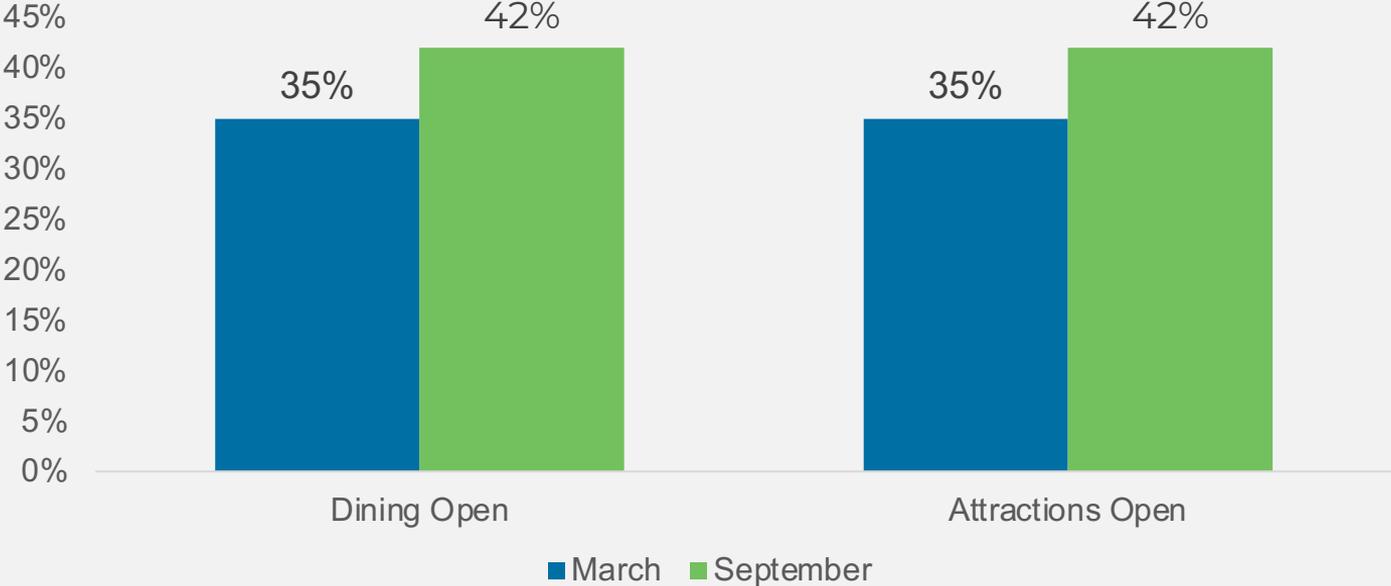


Feeling welcome
in the destination

Welcoming visitors into our communities had been wavering, but now 61% support this



Compared to earlier this year, the availability of attractions and dining are important



Key Takeaways

Traveling Again

Nine in ten Americans intend to travel during the next 6 months, with two-thirds feeling safe to travel outside their communities right now.

Americans Divided

Over four in ten travelers want no COVID-19 restriction or strong mask mandates. Focus on clearly communicating local requirements so travelers are prepared.

COVID-19 Impacts

Some travelers are still taking fewer trips and selecting drive locations over fly. But less than 1 in 10 are actually cancelling trips now because of COVID-19.

Welcome & Open

Travelers want to visit places where they feel welcome and whose restaurants and attractions is open for their business.



Thank You!

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