

The SOUNDTRACK of AMERICA  
• MADE IN •

TENNESSEE®



MEMPHIS LODGING INDUSTRY

FEBRUARY 18, 2022

I Love  
Memphis



# Get LOU

**6 PM**  
HANDY PARK  
BEALE ST.

<p><b>PJ MORTON</b> + MARCELLA &amp; HER LOVERS SAT 05 JUNE</p>	<p><b>ST. PAUL</b> &amp; THE BROKEN BONES + THE MO'S THURS 10 JUNE</p>	<p><b>DAVID RYAN HARRIS</b> + MARCUS SCOTT &amp; KEMISTRY THURS 17 JUNE</p>	<p><b>REBIRTH BRASS BAND</b> + CHINESE CONNECTION DUB EMBASSY THURS 24 JUNE</p>
<p><b>THE WOOTEN BROTHERS</b> + DOTTIE THURS 01 JULY</p>	<p><b>PAUL THORN</b> + AMY LAVERE &amp; WILL SEXTON THURS 08 JULY</p>	<p><b>DAVE BARNES</b> + THE NICK BLACK BAND THURS 15 JULY</p>	<p><b>SON LITTLE</b> + THE SENSATIONAL BARNES BROTHERS THURS 22 JULY</p>
<p><b>CELISSE</b> + TALIBAH SAFIYA THURS 29 JULY</p>	<p><b>MAGGIE ROSE</b> + YOUR ACADEMY THURS 05 AUG</p>	<p><b>MARC BROUSSARD</b> + TURNSTYLES THURS 12 AUG</p>	

MEMPHISTRAVEL.COM/GETAWAY



# CIVIL RIGHTS TRAIL



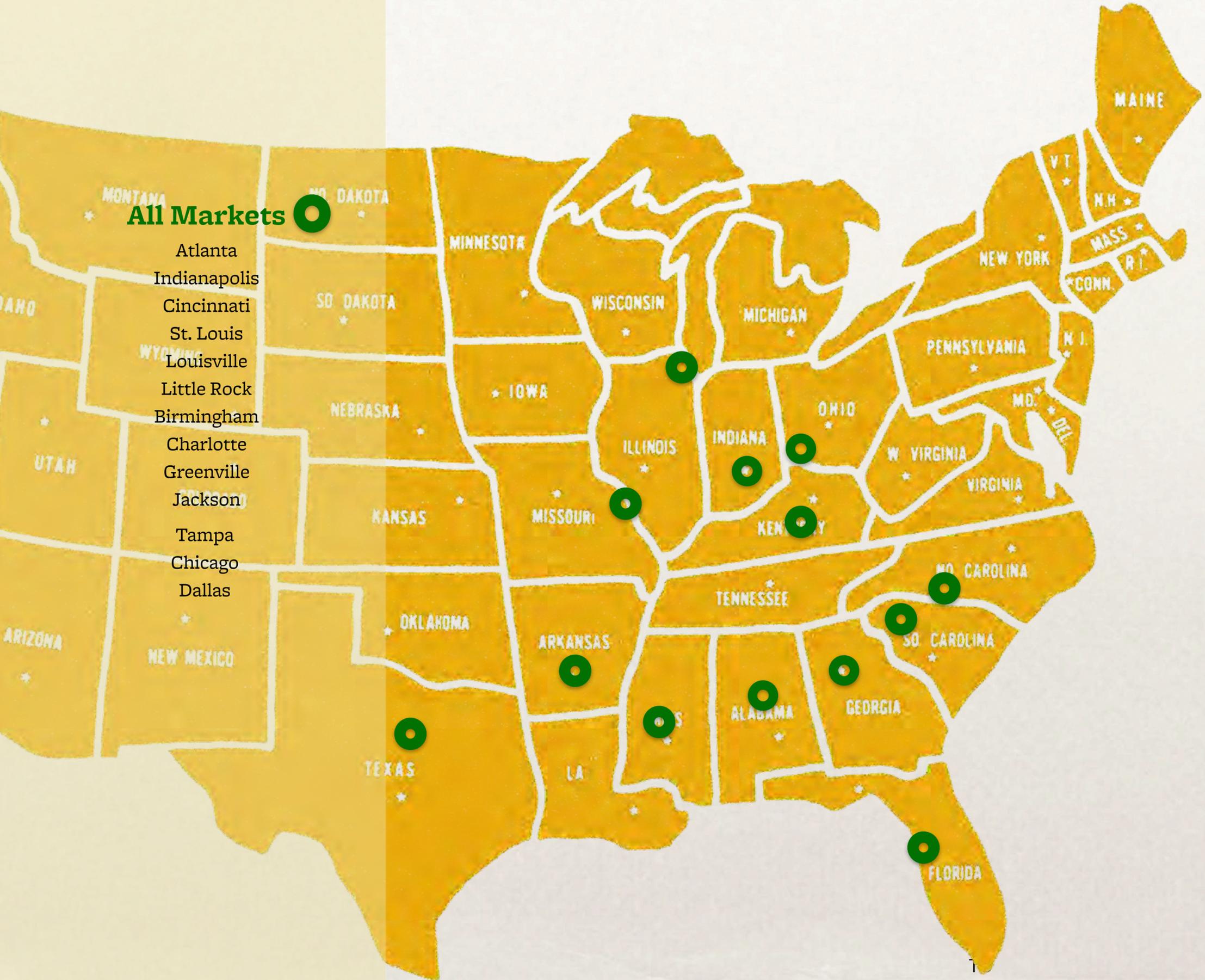
# TENNESSEE SONGWRITERS WEEK

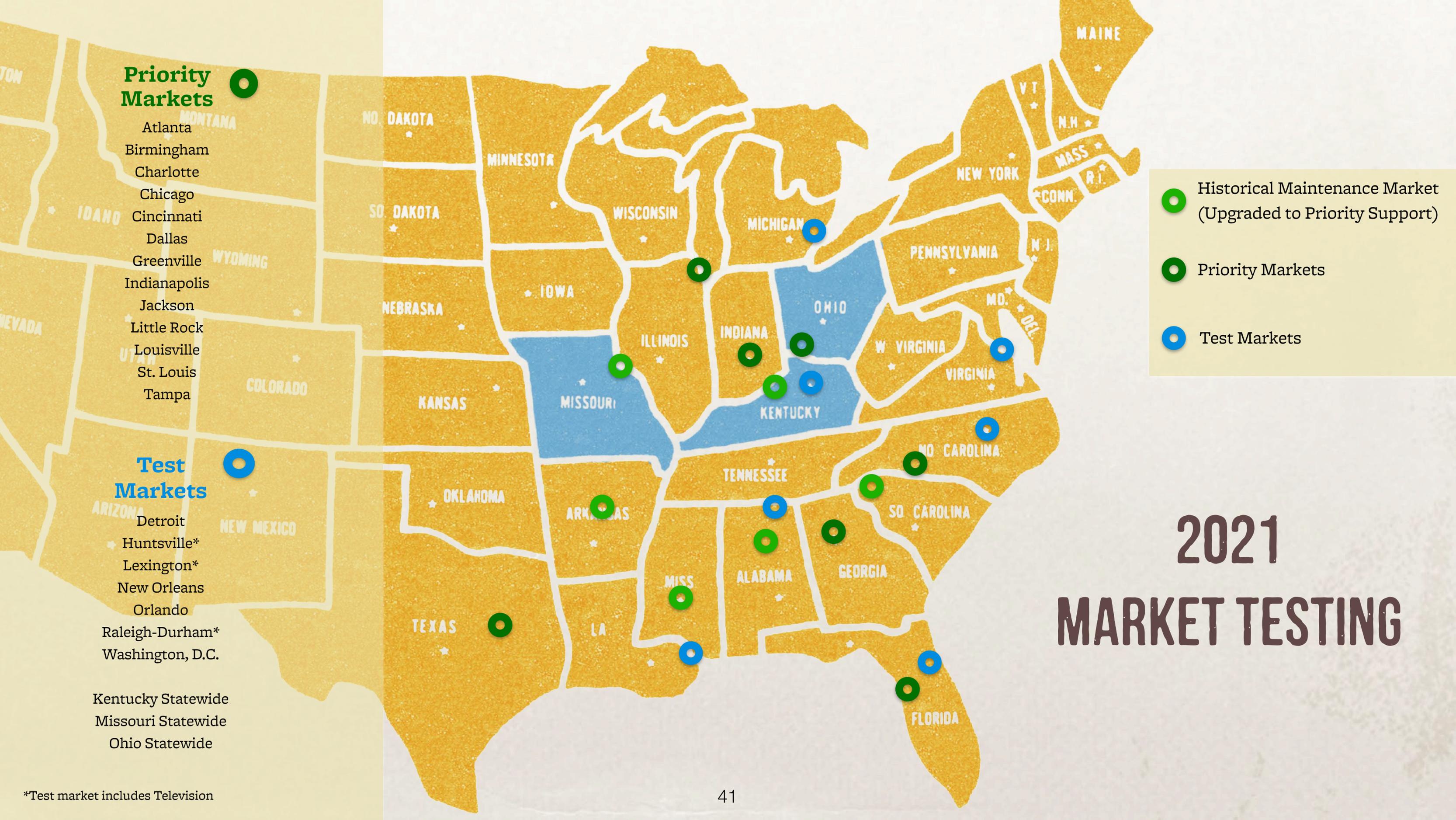


A vibrant, high-angle photograph of a multi-tiered waterfall cascading over dark, mossy rocks in a dense, sun-dappled forest. The water is clear and white with foam as it falls. In the lower right foreground, several people are enjoying the water; some are standing on the rocks, while others are partially submerged. The overall atmosphere is peaceful and inviting, capturing a perfect summer day in nature.

**YOUR SUMMER VACATION  
IS NOW PLAYING  
IN TENNESSEE**

# Historical Markets





**Priority Markets**

- Atlanta
- Birmingham
- Charlotte
- Chicago
- Cincinnati
- Dallas
- Greenville
- Indianapolis
- Jackson
- Little Rock
- Louisville
- St. Louis
- Tampa

**Test Markets**

- Detroit
- Huntsville\*
- Lexington\*
- New Orleans
- Orlando
- Raleigh-Durham\*
- Washington, D.C.

- Kentucky Statewide
- Missouri Statewide
- Ohio Statewide

- Historical Maintenance Market (Upgraded to Priority Support)
- Priority Markets
- Test Markets

**2021 MARKET TESTING**

\*Test market includes Television

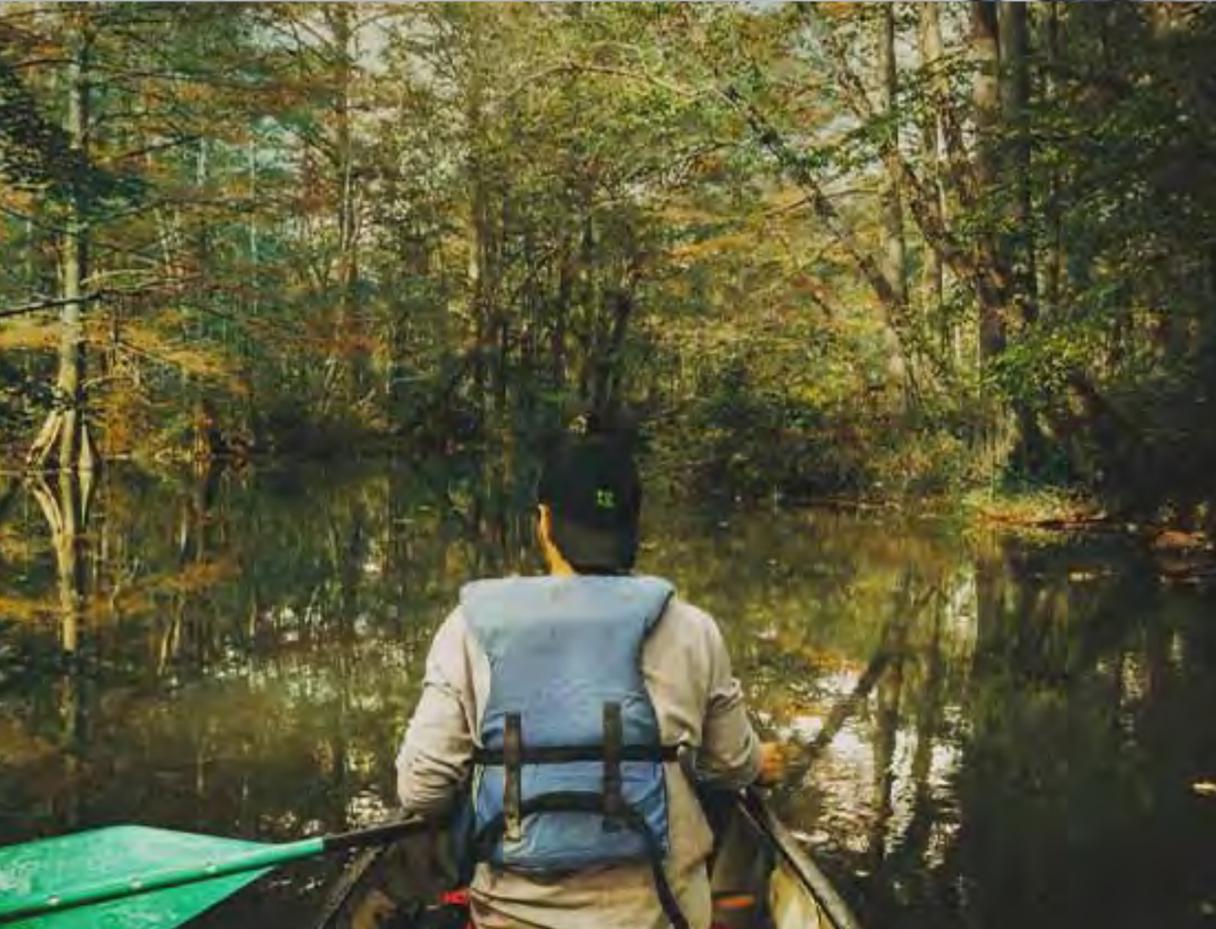
# CAMPAIGN TIMING

Campaign Launch: 5/17 - 8/31



5/17 5/24 5/31 6/7 6/14 6/21 6/28 7/5 7/12 7/19 7/26 8/2 8/9 8/16 8/23 8/30

	5/17	5/24	5/31	6/7	6/14	6/21	6/28	7/5	7/12	7/19	7/26	8/2	8/9	8/16	8/23	8/30	
<b>Priority Market Broadcast</b>	All Priority Markets																
<b>Test Market Broadcast</b>						Raleigh-Durham, Lexington, Huntsville											
<b>Priority Market Digital</b>	Pre-Roll, Display, Social, Audio											Kid Reviewed Only					
<b>Test Market Digital</b>						Pre-Roll, Display, Social											
<b>AON Search</b>									Search								



# NOW PLAYING CAMPAIGNS

5/17 - 8/31

**331MM**

Impressions

**109MM**

Completed Video Views  
(Paid Media)

**461K**

Landing Page Visits

**78%**

Arrival Lift

# SUMMER CAMPAIGN/HISTORICAL SPRING CAMPAIGNS

Year	Spend	Impressions	Clicks	Video View	Video Completions	Site Sessions	Hotel ROAS	Arrival Lift	Notes
<b>2021*</b> <b>(May - Aug)</b>	\$5,373,709	331,639,255	726,942	145,328,559	123,880,789	1,879,745	\$69.86	78.0%	Broadcast impressions included.  New Test Markets
<b>2020</b> <b>(Feb - Mar)</b>	\$1,025,095	32,014,680	72,795	22,428,088	21,388,779	280,416	\$87.03	55.2%	Heavy broadcast during time in market, paused early
<b>2019</b> <b>(Feb - June)</b>	\$2,250,000	178,302,970	610,000	78,102,970	62,502,970	1,637,038	\$139.98	39.44%	Includes Co-op impressions

\*results through 8/31, includes Kid Reviewed & Now Playing

# CAMPAIGN PERFORMANCE

<b>Awareness</b>	<b>Paid Media Engagement</b>	<b>ADARA**</b>	<b>Arrivalist**</b>
<b>331,639,255</b> Impressions	<b>726,942</b> Clicks	<b>389,539</b> Influenced Hotel Bookings	<b>0.45</b> APM
<b>145,328,559</b> Video Views	<b>123,880,798</b> Video Completions	<b>\$137.3M</b> Hotel Revenue	<b>78.0%</b> Arrival Lift
		<b>\$69.86</b> ROAS	

*\*\*All possible media will be tagged and measured with both ADARA and Arrivalist. Attribution window will run through November 2021.*

*\*\* We were able to track \$1,965,745.86 or 31% of our paid media budget with ADARA pixels.*

*ADARA results are based on their enriched data model, but it does not account for 100% of hotels across the state.*

# ADARA COVERAGE

- ADARA's hotel coverage is about 42% in Tennessee and includes (but not limited) to:
  - **Marriott Bonvoy/Starwood properties** - Ritz Carlton, St. Regis, JW Marriott, W Hotels, Sheraton, Marriott Vacation Club, Delta, Le Meridien, Westin, Renaissance, Gaylord, Courtyard, Four Points, Springhill Suites, Protea, Fairfield Inn, AC Hotels, Aloft, Moxy, Residence Inn, Towneplace, Autograph Collection, Design Hotels, Tribute
  - **Choice properties** - Comfort Inn, Cambria, Ascend, Quality Inn, Sleep Inn, Clarion, MainStay Suites, Woodspring Suites, Suburban Extended Stay, Econolodge, Rodeway Inn
  - **Best Western properties** - GLo, ViB, Best Western, Best Western plus, BW Premier Collection, Best Western Premier, Sadie, BW Signature, Executive residency, Aiden
  - **OTA (online travel agency) data** - Kayak, Jack Rabbit and others
  - **Addition of Independent Properties**



# KID REVIEWED

# KID REVIEWED LOCATIONS

## Memphis

Peabody Ducks  
Memphis Zoo  
My Big Backyard  
Fire Museum  
Bass Pro Shop  
Children's Museum of Memphis  
Shelby Farms Park

## Nashville

Adventure Science Center  
Nashville Zoo  
Soundwaves\*  
SOAR Adventure  
Frist Art Museum  
Country Music Hall of Fame and Museum  
Discovery Center at Murfee Spring  
Cheekwood Estate & Gardens  
Nashville Shores\*

## Chattanooga

Tennessee Aquarium  
Chattanooga Zoo  
Highpoint Climbing  
Creative Discovery Museum  
Lookout Mountain Attractions - Rock City/  
Ruby Falls/  
Incline Railway

## Knoxville

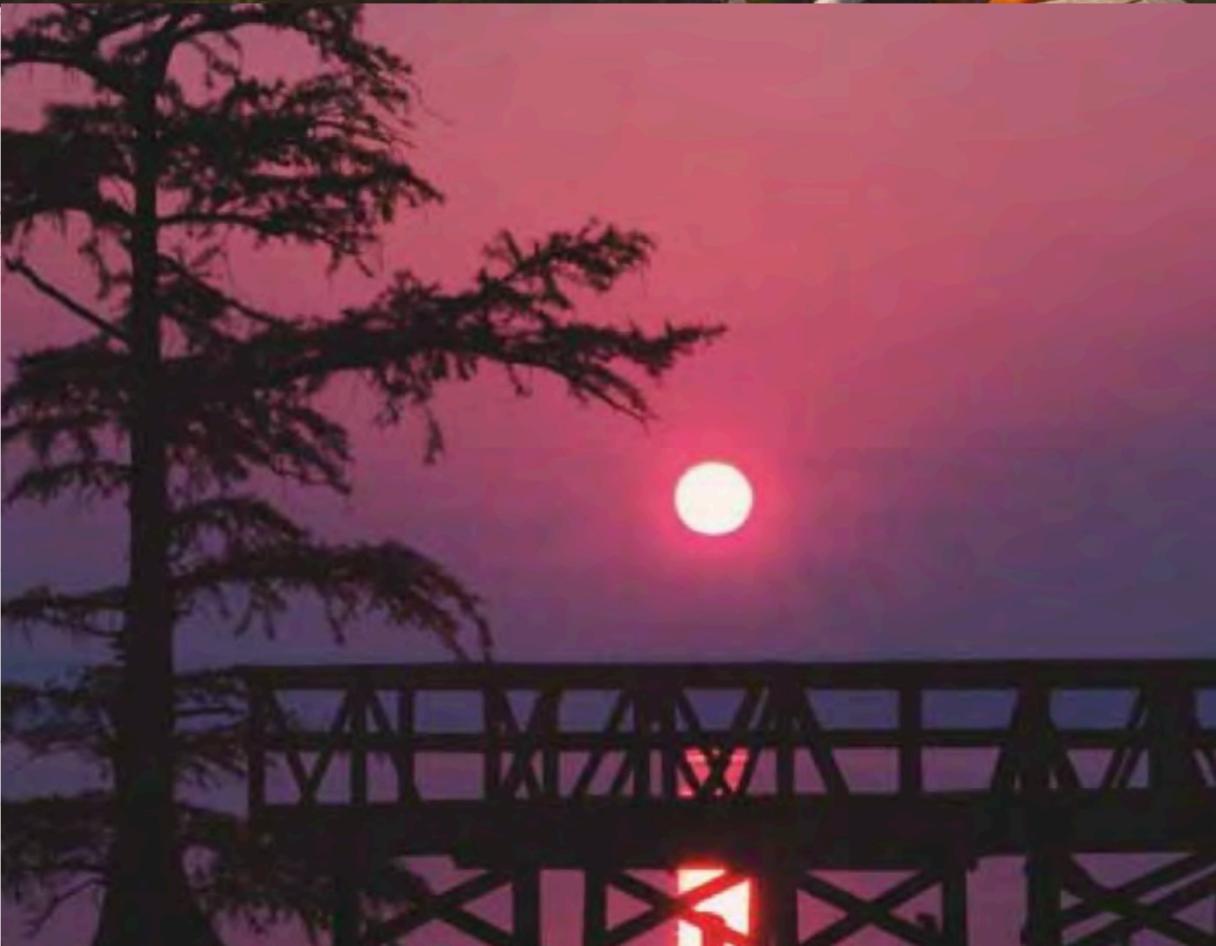
The Muse  
Navitat  
Zoo Knoxville

## Smokies

Dollywood  
Ripley's Believe it or Not  
Sevier Air  
Anakeesta  
Wilderness at the Smokies\*  
Pigeon Forge Snow  
The Island  
Ripley's Aquarium  
Parrot Mountain and Gardens  
Soaky Mountain Water Park\*  
Foxfire Mountain Adventure Park  
Ober Gatlinburg

## Other

Discovery Park of America  
Safari Park  
Casey Jones Village  
Fall Creek Falls  
Hands On!  
Wilderness (Jackson)\*  
Bays Mountain Park & Planetarium



# KID REVIEWED CAMPAIGNS

5/17 - 8/31

**62MM**

Impressions

**23MM**

Completed Video Views  
(Paid Media)

**176K**

Clicks to Site

**75%**

Arrival Lift

# KID REVIEWED CAMPAIGN/HISTORICAL CAMPAIGNS

Year	Spend	Impressions	Clicks	Video View	Video Completions	Site Sessions	Hotel ROAS	Arrival Lift	Notes
<b>2021 (May - Aug)</b>	\$992,675	62,761,579	176,971	28,007,403	22,991,097	118,886	\$297.97	75%	Broadcast impressions included. New Test Markets
<b>2019 (Feb - June)</b>	\$537,329	66,700,000	160,000	19,100,000	8,200,000	82,546	\$142.37	34%	Includes Dollywood Impressions

\*results through 8/31, includes Kid Reviewed & Now Playing

# CAMPAIGN PERFORMANCE

<b>Awareness</b>	<b>Paid Media Engagement</b>	<b>ADARA**</b>	<b>Arrivalist**</b>
<b>62,761,579</b> Impressions	<b>176,971</b> Clicks	<b>141,027</b> Influenced Hotel Bookings	<b>0.4</b> APM
<b>28,007,403</b> Video Views	<b>22,991,097</b> Video Completions	<b>\$49.5M</b> Hotel Revenue	<b>74.70%</b> Arrival Lift
		<b>\$297.97</b> ROAS	

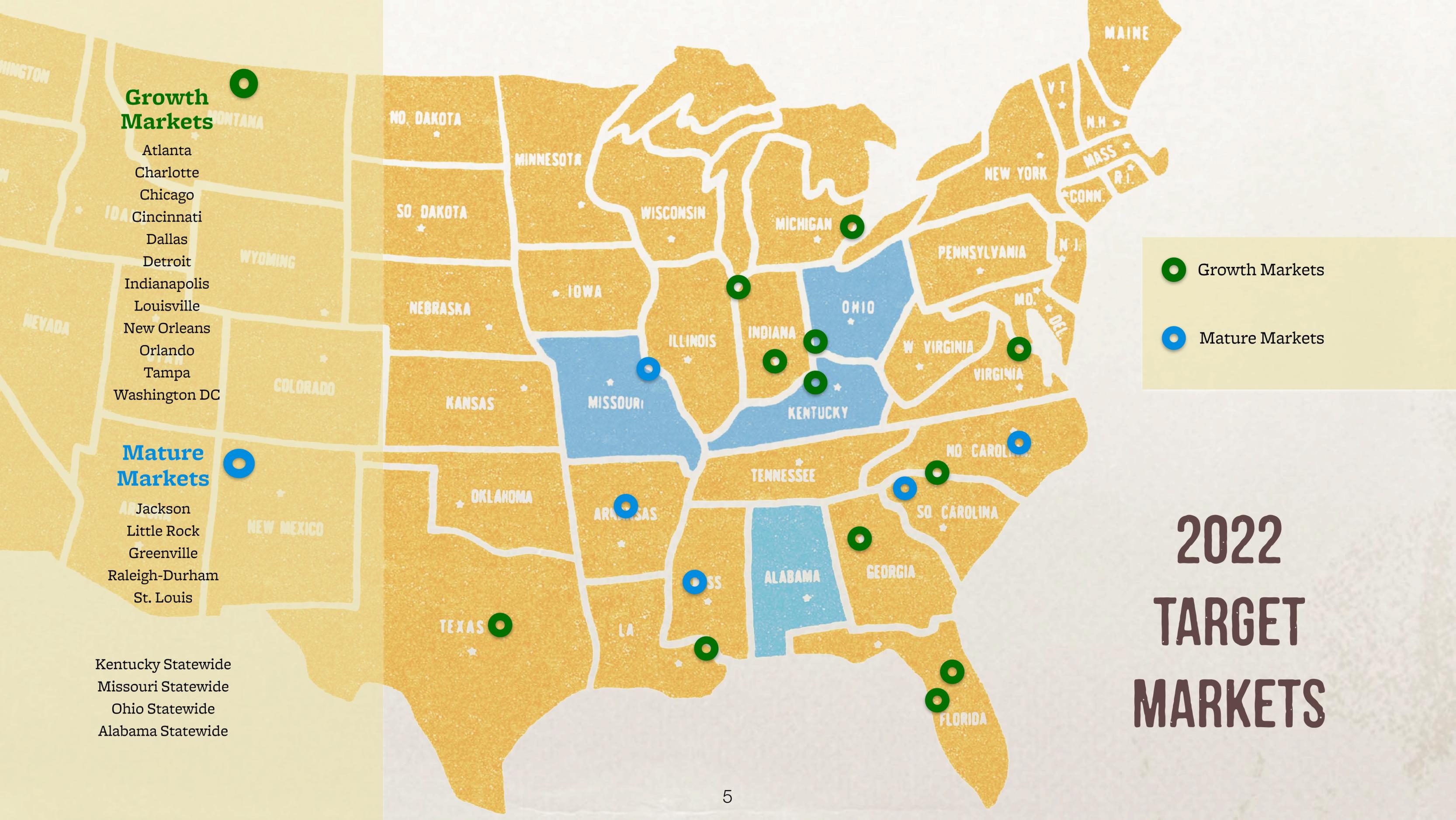
*\*\*All possible media will be tagged and measured with both ADARA and Arrivalist. Attribution window ran through November 2021.*

*\*\* We were able to track \$166,369.99 or 17% of our paid media budget with ADARA pixels.*

*ADARA results are based on their enriched data model, but it does not account for 100% of hotels across the state.*

# SPRING BRAND





**Growth Markets**

- Atlanta
- Charlotte
- Chicago
- Cincinnati
- Dallas
- Detroit
- Indianapolis
- Louisville
- New Orleans
- Orlando
- Tampa
- Washington DC

**Mature Markets**

- Jackson
- Little Rock
- Greenville
- Raleigh-Durham
- St. Louis

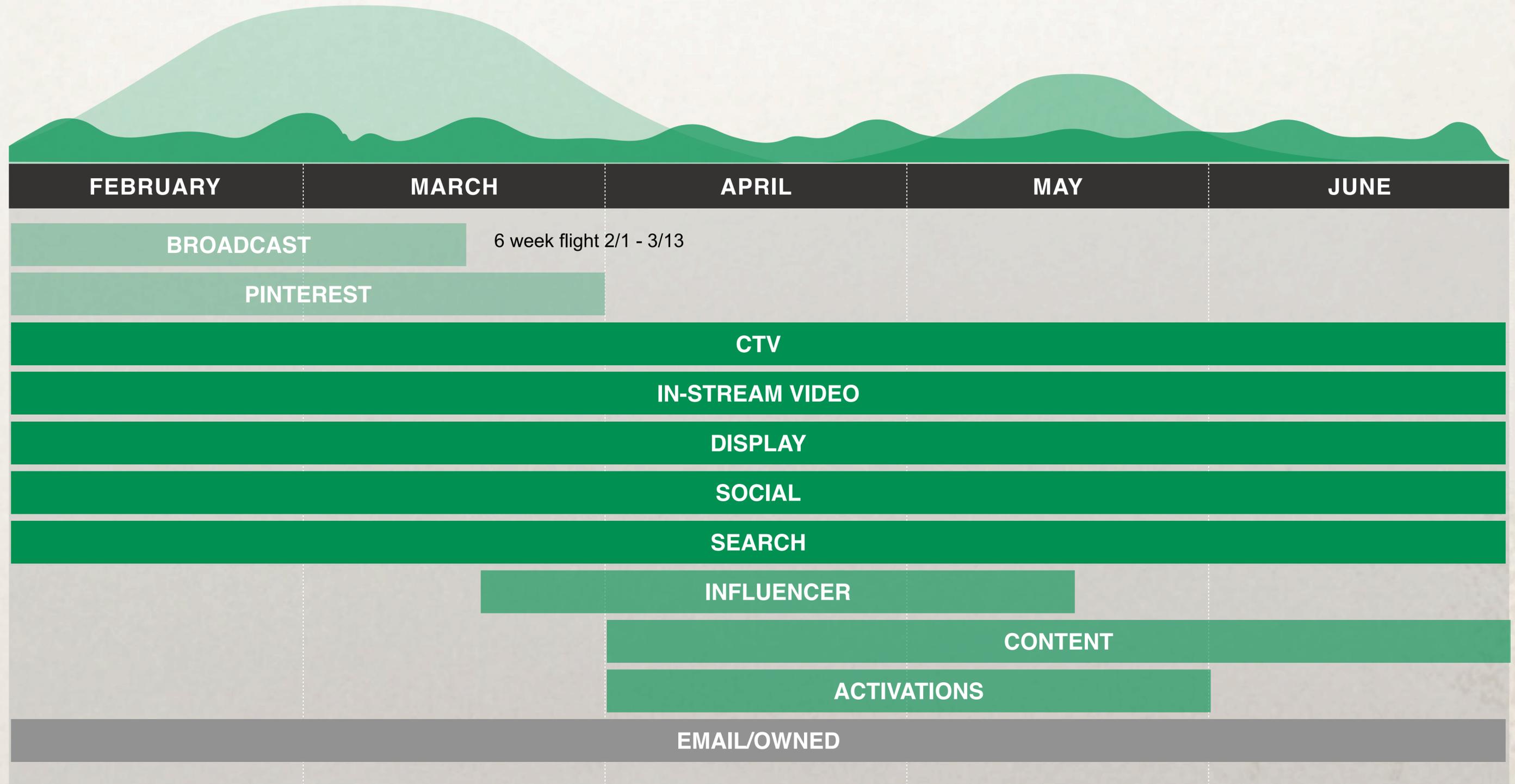
- Kentucky Statewide
- Missouri Statewide
- Ohio Statewide
- Alabama Statewide

- Growth Markets
- Mature Markets

**2022  
TARGET  
MARKETS**

# SPRING 2022 CAMPAIGN TIMING

Campaign Launch: 2/1 - 6/30 (Spring Brand & Kid Reviewed)





# ARRIVALIST DATA

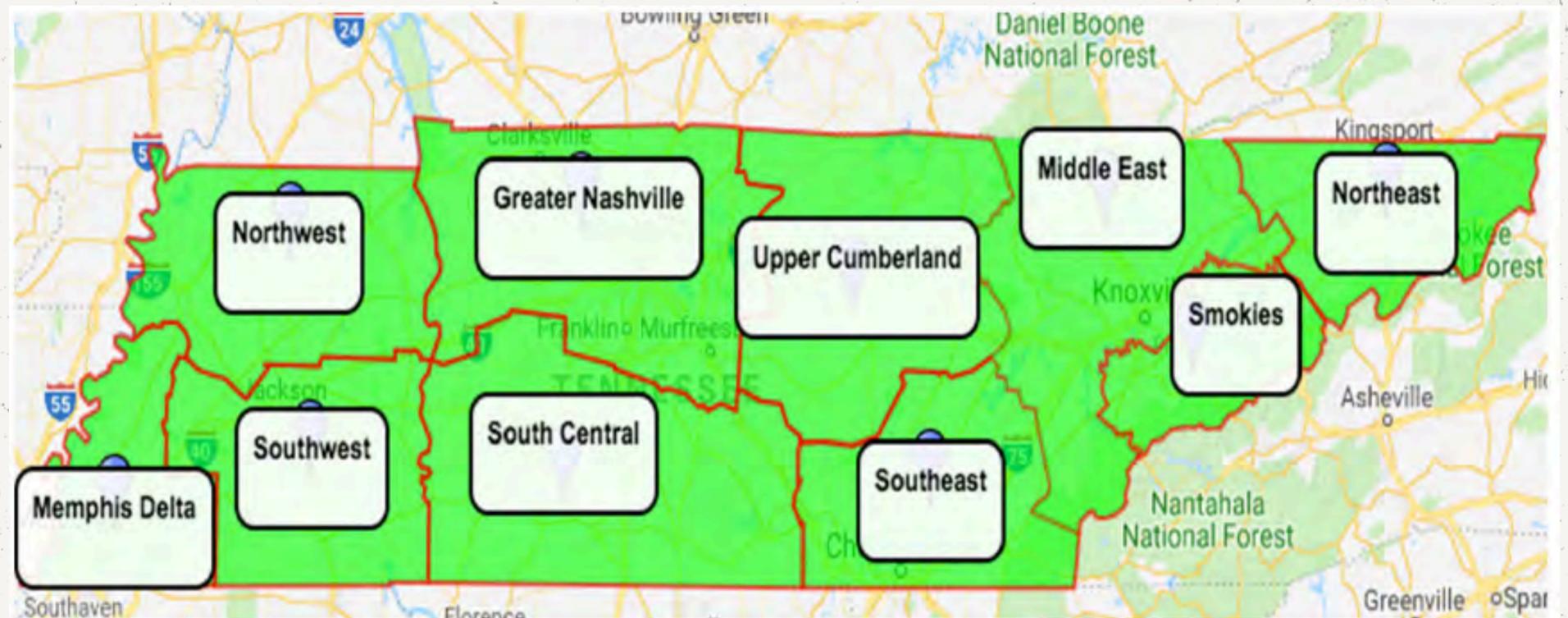
## MEMPHIS REGION

# TENNESSEE ARRIVALIST SETUP CRITERIA

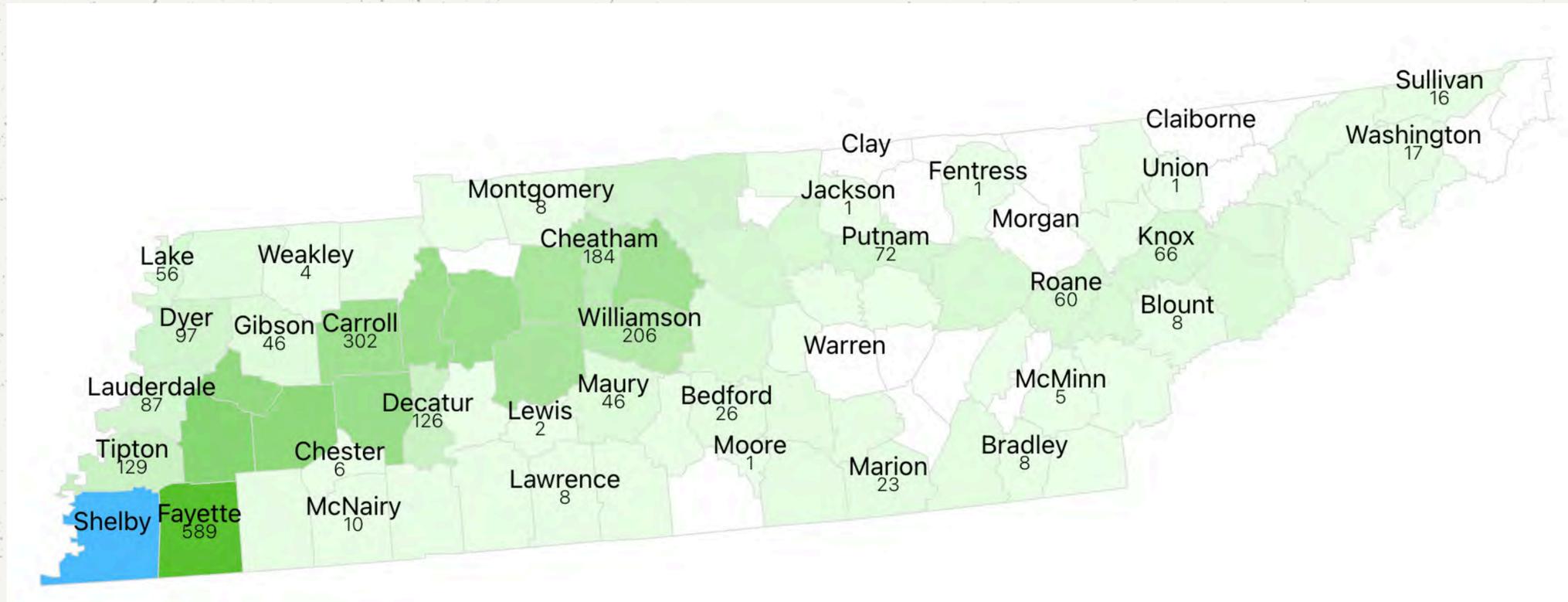
TDTD defined 10 regions as POIs to track arrivals to each region as well as cross-region visitation.

## Arrival Criteria

- They traveled at least 50 miles from their home (home can be both TN residents as well as out-of-state residents)
- They spent a minimum of 5 hours within the state of TN
- They spent majority of trip time in TN



# CROSS COUNTY VISITATION - SHELBY COUNTY



Primary Arrival	Secondary Arrival
Shelby	Fayette
Shelby	Haywood
Shelby	Madison
Shelby	Crockett
Shelby	Henderson
Shelby	Humphreys
Shelby	Benton
Shelby	Carroll
Shelby	Davidson
Shelby	Hickman

Source: Arrivalist May 17, 2021 - November 30, 2021 (post attribution). Arrivals exposed Summer 2021 campaign.

# VISITATION BY DMA - MEMPHIS DELTA REGION

DMA	% of Arrivals
Nashville	8.0%
Dallas/Fort Worth	6.6%
Memphis	5.5%
Little Rock	4.8%
Jackson - TN	3.3%
Houston	3.0%
Columbus/Tupelo	2.7%
Chicago	2.6%
Atlanta	2.4%
Paducah	2.3%

*Source: Arrivalist May 17, 2021 - November 30, 2021 (post attribution). Arrivals exposed Summer 2021 campaign.*

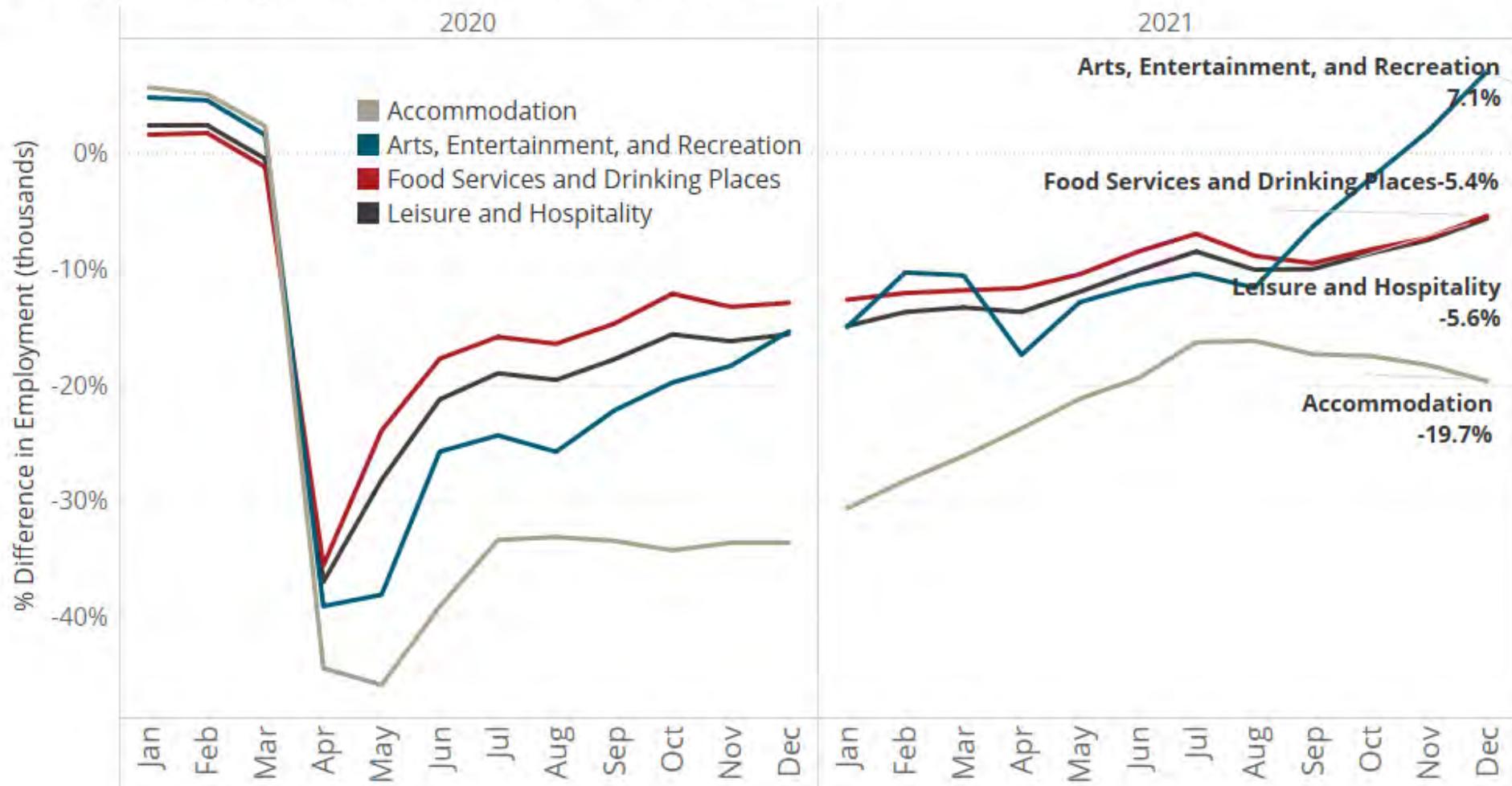
# VISITATION BY DMA - SHELBY COUNTY

DMA	% of Arrivals
Nashville	8.6%
Memphis	7.2%
Jackson - TN	4.7%
Little Rock	4.3%
Chicago	3.9%
Columbus	3.8%
Dallas/Fort Worth	3.7%
Atlanta	3.3%
Paducah	2.9%
Jackson - MS	2.5%

Source: Arrivalist May 17, 2021 - November 30, 2021 (post attribution). Arrivals exposed Summer 2021 campaign.

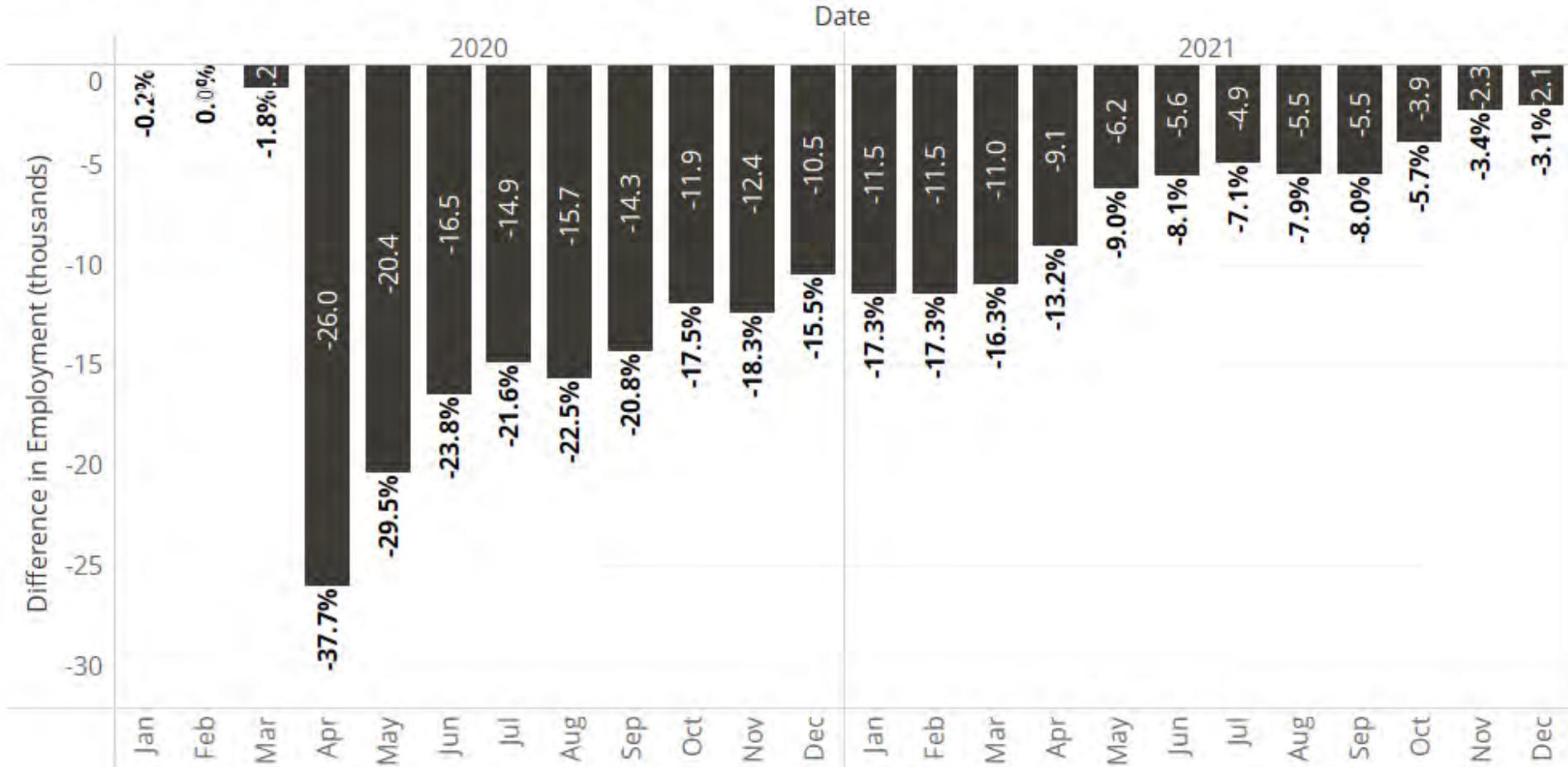
# L&H Employment Statewide – Dec (preliminary)

Statewide Leisure and Hospitality Employment  
 % Change over 2019 by industry. December 2021 values are preliminary.



# L&H Employment Memphis MSA – Dec (preliminary)

Leisure and Hospitality Employment - Memphis, TN-MS-AR  
Change (thousands) and % Change over 2019



# Statewide Employment by Industry – Dec (preliminary)

## Statewide Employment by Industry - December 2021 (preliminary)

Average annual employment (thousands), change over 2019 (thousands), and % change over 2019.

Supersector	Avg. Employment, Thousands			Change over 2019, Thousands			% Change over 2019		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
Professional and Business Services	437	437	455	0	0	18	0.0%	0.0%	4.0%
Trade, Transportation, and Utilities	659	657	677	0	-2	18	0.0%	-0.3%	2.7%
Other Services	123	118	126	0	-5	3	0.0%	-4.1%	2.4%
Financial Activities	175	171	177	0	-4	2	0.0%	-2.3%	0.9%
Manufacturing	357	346	354	0	-11	-2	0.0%	-3.1%	-0.6%
Government	449	438	443	0	-11	-6	0.0%	-2.4%	-1.3%
Mining, Logging, and Construction	136	133	134	0	-3	-2	0.0%	-1.8%	-1.3%
Information	46	43	45	0	-3	-1	0.0%	-5.7%	-1.5%
Education and Health Services	452	431	431	0	-21	-21	0.0%	-4.6%	-4.6%
Leisure and Hospitality	345	291	326	0	-54	-19	0.0%	-15.6%	-5.6%
Total Nonfarm	3,178	3,065	3,167	0	-113	-11	0.0%	-3.6%	-0.3%

# Lodging Update - Smith Travel Research

- Tennessee opened 37 hotels accounting for 4,281 rooms in 2021
- The annual RevPAR level in Tennessee for 2021 was \$71.12, 92.1% of the 2019 comparable
- The highest monthly RevPAR level in Tennessee was in July 2021 (\$99.61), which was the highest level for any month in the state on record

MEMPHIS

RENASANT  
CONFERENCE CENTER

# 2022 TENNESSEE GOVERNOR'S CONFERENCE ON HOSPITALITY & TOURISM

SEPT. 28 – 30



THANK YOU