

EXPLORE
GEORGIA

COVID-19 DASHBOARD

April/May 2020

COVID-19 DASHBOARD

This dashboard is intended to give an overview of the impact of COVID-19 on Georgia's tourism industry. In this dashboard, you will find the latest statistics for the state's tourism industry along with insights into visitor engagement with the Explore Georgia brand.

The Explore Georgia team is actively working to keep Georgia top of mind with visitors and prepare our state for a strong recovery.

EXECUTIVE SUMMARY

April/May 2020

- Nationwide, the month of April registered historic low-points for the economy as a whole, with the tourism industry suffering the greatest losses. Recovery is starting, but it is a slow, steady march, and many restrictions are still in place.
- Impacts on employment, travel spending, and visitation worsened in April, and modest recoveries began in May.
- Consumer confidence is growing, especially in the South & Midwest and in younger generations, but visitors remain hesitant about many aspects of travel.
- 70% of travelers have plans to travel this year, most by car to visit loved ones or seek an outdoor getaway.
- Residents are more supportive of opening their communities to visitors, but still opposed to seeing them advertised.
- Georgia began to see indications that the pent-up demand for travel was benefiting many destinations in the state, particularly around the Easter and Memorial Day holidays.
- Visitor behavior on our owned channels indicates that visitor interest in, and engagement with, our travel products is steadily increasing and recovering faster than other, competitive state DMOs.

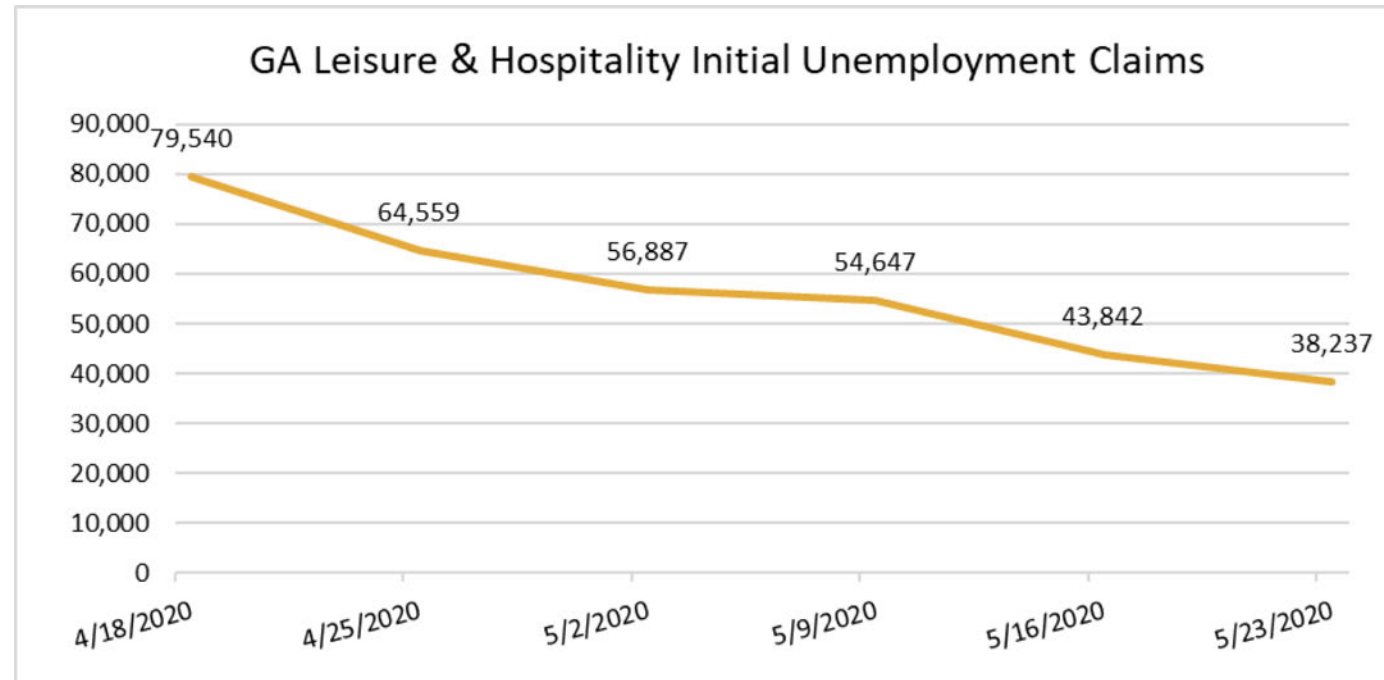
GEORGIA'S TOURISM INDUSTRY: CURRENT STATUS

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GEORGIA UNEMPLOYMENT: APRIL & MAY

The unemployment rate in Georgia jumped from 4.6% in March to 11.9% in April, the highest level since such figures began to be recorded in 1976. In the month of April, total non-farm employment fell by approximately 492,100 jobs, 206,700 (42%) of which were in Leisure & Hospitality (the “Accommodations and Food Services” & “Arts, Entertainment and Recreation” sectors).

However, weekly Leisure & Hospitality Initial Unemployment Claim filings peaked the first week of April, and have been declining ever since.



GEORGIA UNEMPLOYMENT: ECONOMIC IMPACT

According to the Georgia Department of Labor, in March and April, approximately 187,500 jobs were lost in the Accommodations and Food Services sector alone.

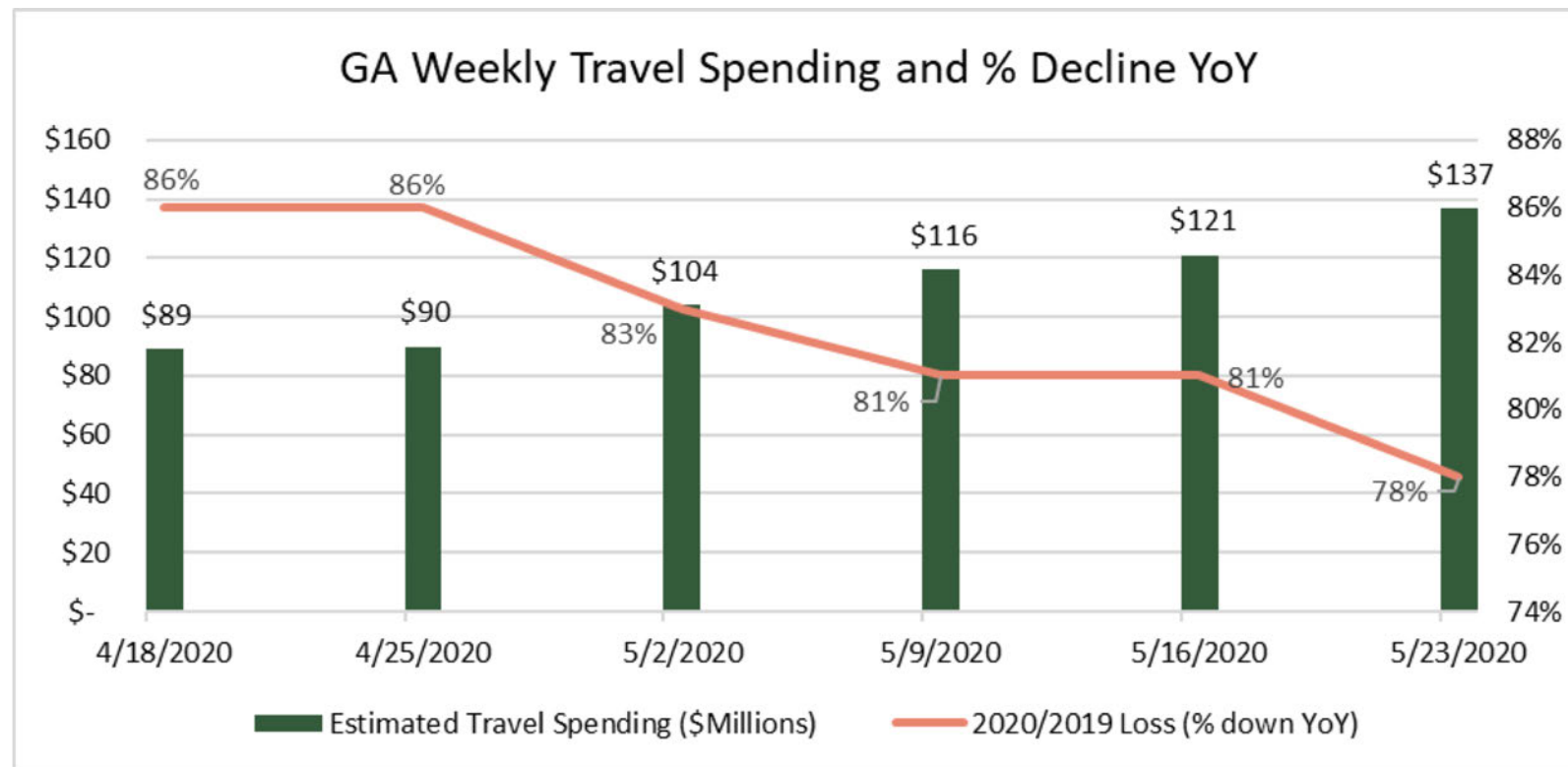
The Hospitality and Food Industry Management program at the University of Georgia used IMPLAN software to estimate the economic impact of these job losses. For the months of March and April, the total economic impact of lost labor income in the Accommodations and Food Services sector was over \$1.4 billion. Accounting for the ripple effects on GDP and other industry sectors caused by these job losses, the total economic impact was over \$4.3 billion in lost output.

Economic Impacts on the State of Georgia Economy of Employment Reductions in the Accommodation and Food Services Sector in March and April, 2020

Impact Type	Economic Impact Indicator		
	Labor Income	Value Added	Output
Direct	-\$770,461,053	-\$1,164,902,413	-\$2,202,848,029
Indirect	-\$362,759,482	-\$589,188,280	-\$1,130,594,561
Induced	-\$308,622,518	-\$575,406,916	-\$989,152,502
TOTAL	-\$1,441,843,053	-\$2,329,497,609	-\$4,322,595,092

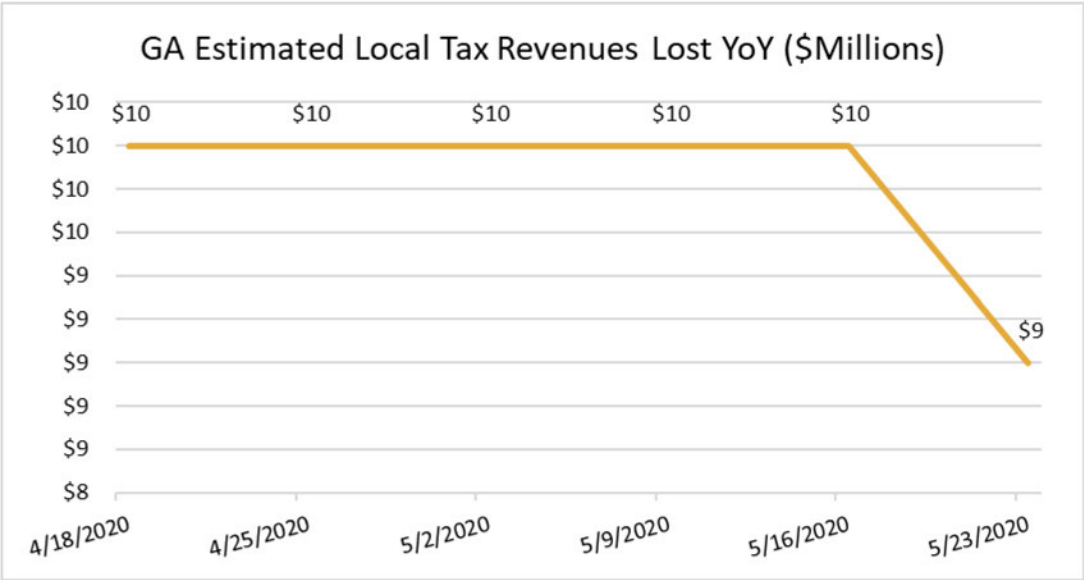
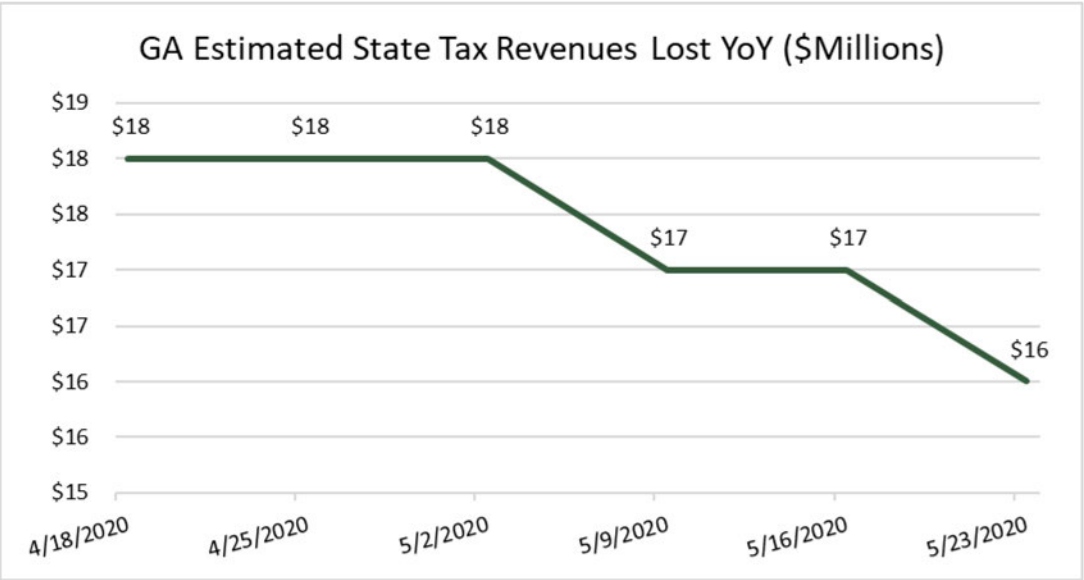
GEORGIA TRAVEL SPENDING: APRIL & MAY

From the week ending April 18 through the week ending May 23, total estimated travel spending in Georgia was down \$3.09 billion in 2020, compared to 2019. Weekly travel spending hit a low point the 2nd week in April, and has been gradually climbing since then. Expenditures the week ending May 23 were down 78%, compared to 2019.



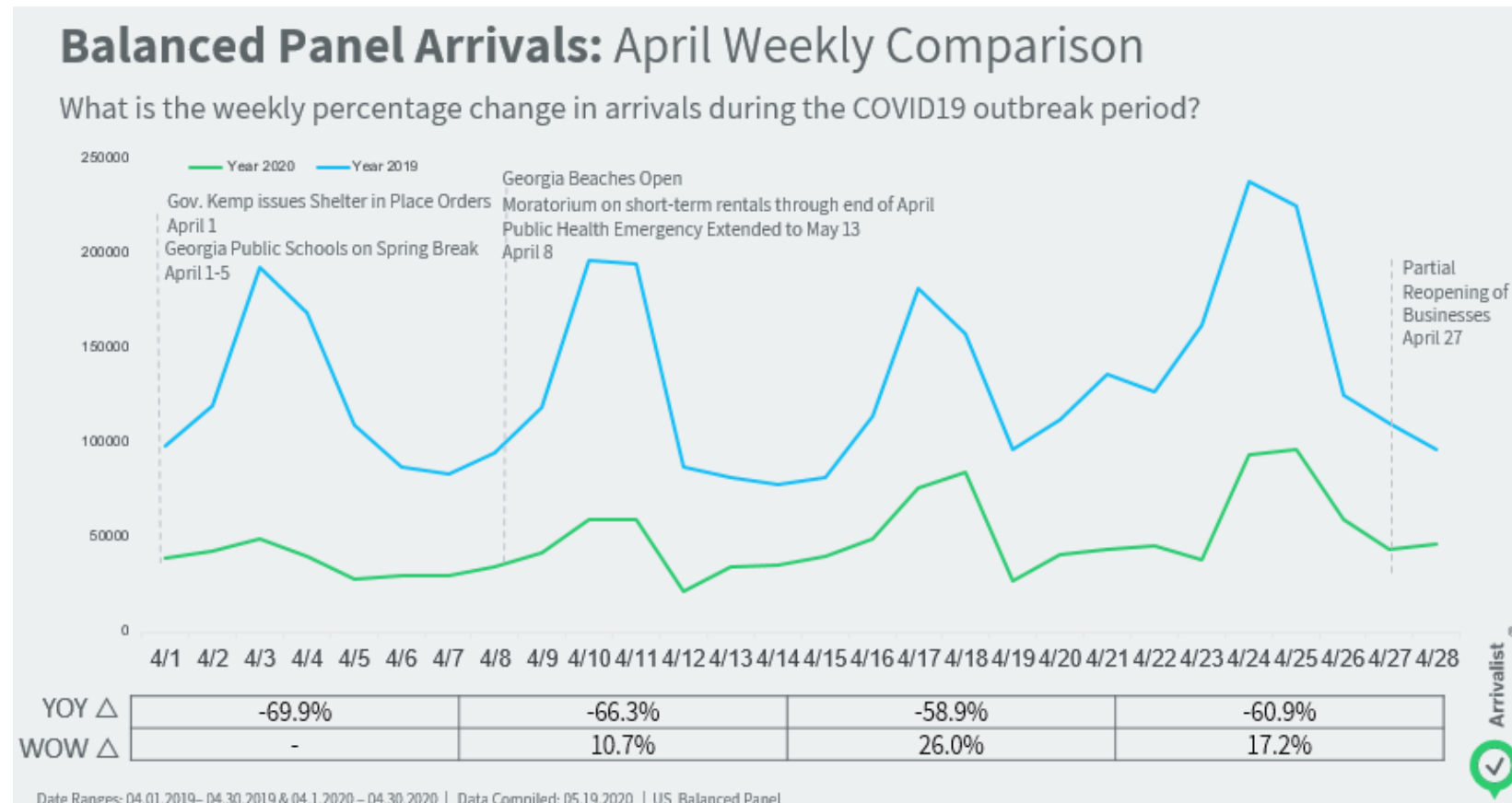
GEORGIA TAX REVENUES: APRIL & MAY

From the week ending April 18 through the week ending May 23, total estimated travel-generated state and local tax revenues in Georgia were down \$163 million in 2020, compared to 2019. As a result of improved travel spending figures, weekly tax revenue losses stabilized toward the end of April and have begun to improve.



GEORGIA DOMESTIC VISITATION: APRIL 2019 & 2020

In 2019, 6.9% of trips* to/within Georgia occurred in April. In 2020, as confirmed COVID-19 cases reached a crescendo and many states (including GA) enacted Shelter-In-Place orders, daily arrivals remained significantly depressed YoY.

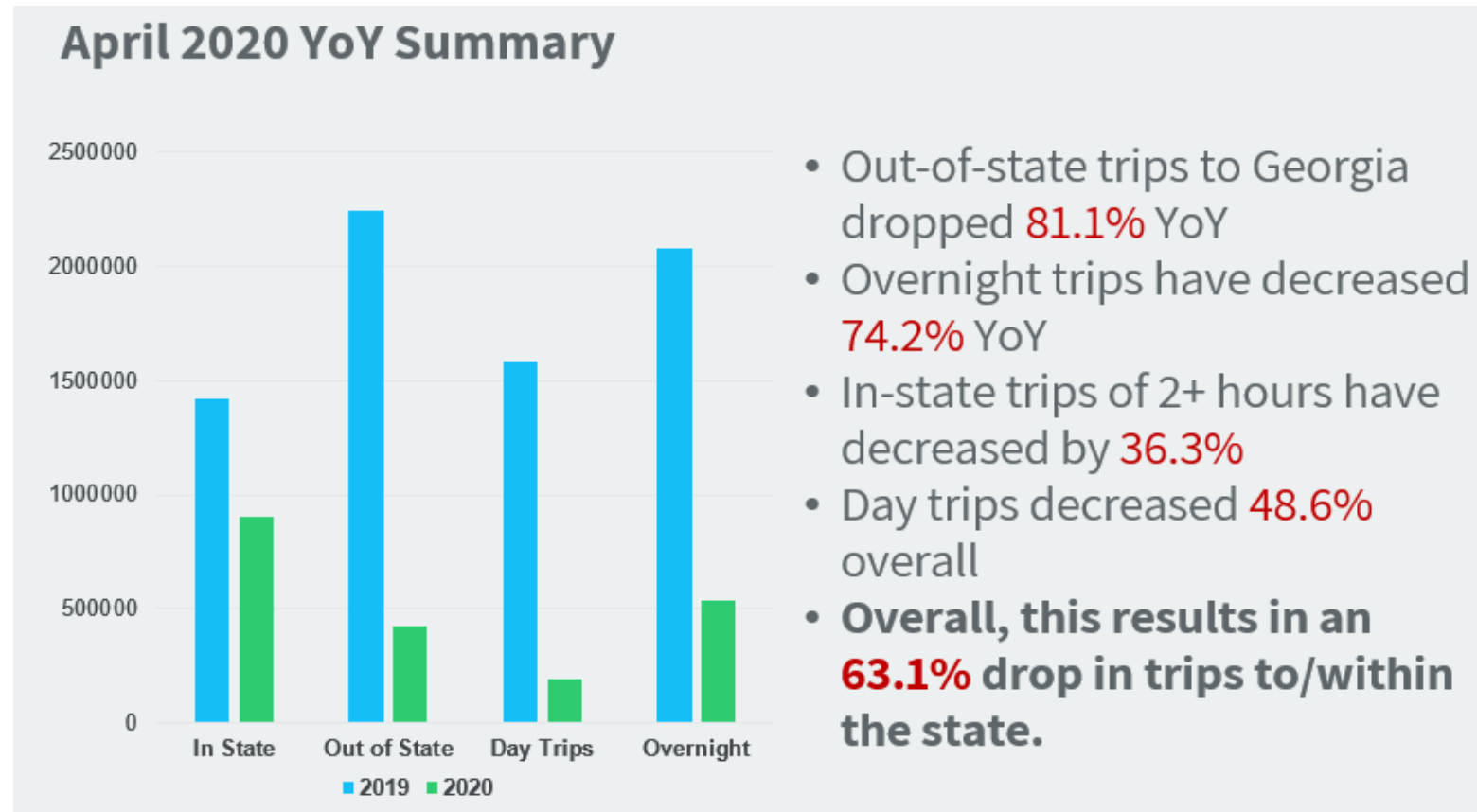


Source: Arrivalist

*Arrivalist tracks a representative panel of American travelers using GPS data from their mobile devices. They define a trip as someone (not a commuter) venturing >50 miles from home, and spending ≥ 2 hours and the majority of their trip in the arrival zone.

GEORGIA DOMESTIC VISITATION: APRIL YOY

Trips* in April fell by 63.1% YoY. While the in-state and day trip segments registered significant declines, the overall decrease was driven by impacts on the out-of-state and overnight trip segments.



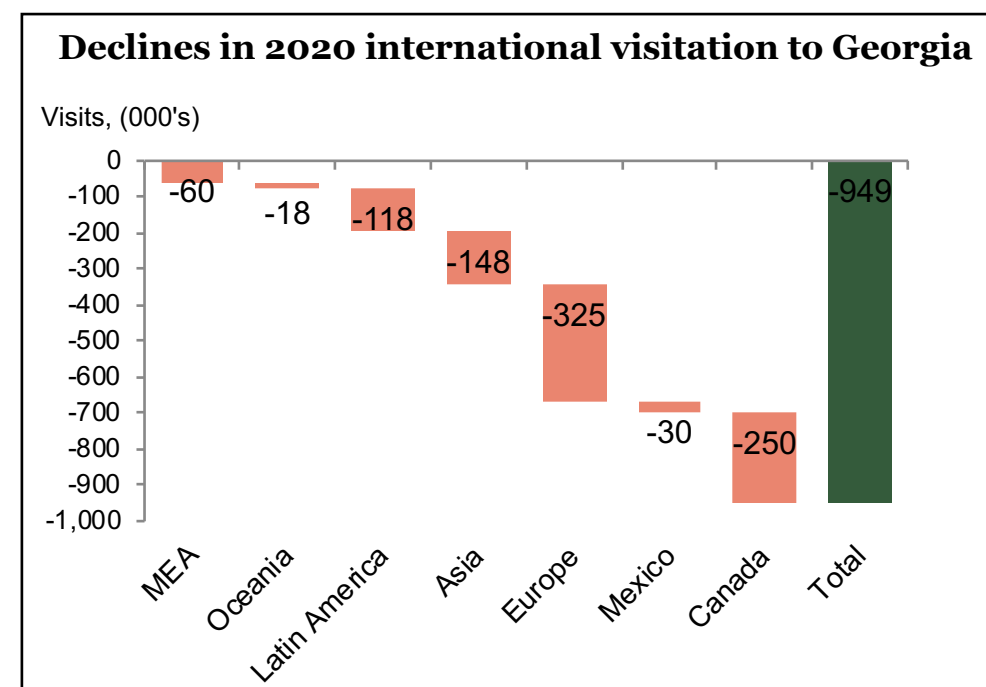
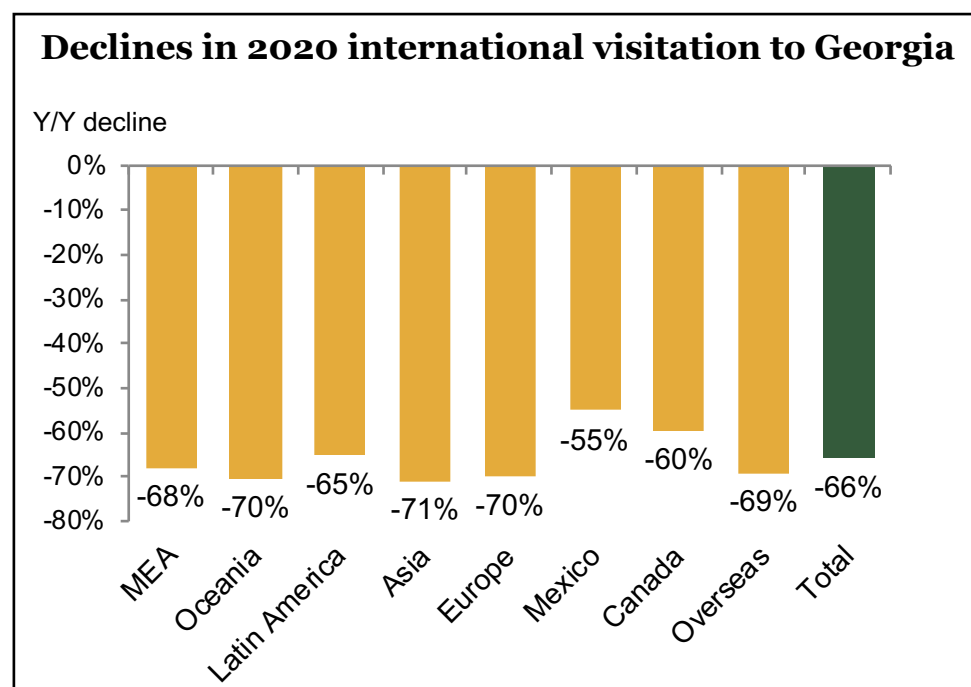
Source: Arrivalist

*Arrivalist tracks a representative panel of American travelers using GPS data from their mobile devices. They define a trip as someone (not a commuter) venturing >50 miles from home, and spending ≥ 2 hours and the majority of their trip in the arrival zone.

GEORGIA INTERNATIONAL VISITATION: 2020 FORECASTS

Georgia is currently forecasted to register a 66% decline (-949,000 arrivals) in total international visitation and a 67% decline (-\$1.38 billion) in total international spending compared to 2019.

A 69% decline (-669,000 arrivals) in Overseas visitation, a 60% decline (-250,000 arrivals) in Canadian visitation, and a 55% decline (-30,000 arrivals) in Mexican visitation are anticipated.



GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

In April, Georgia Hotel Rooms Sold and RevPAR were down 61.6% and 77.6%, respectively, compared to 2019. Since hitting a low point in the 3rd week of April, U.S. Hotel Occupancy and RevPAR – while still significantly depressed compared to 2019 – have been experiencing modest gains week-over-week.

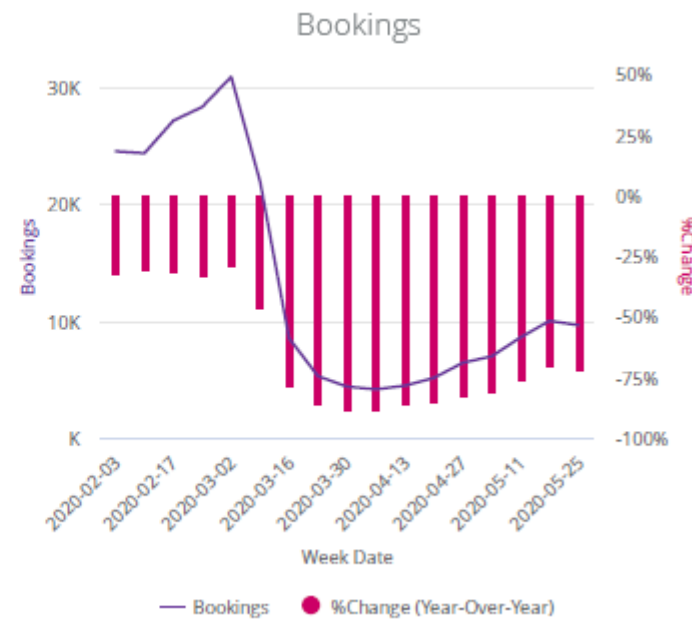
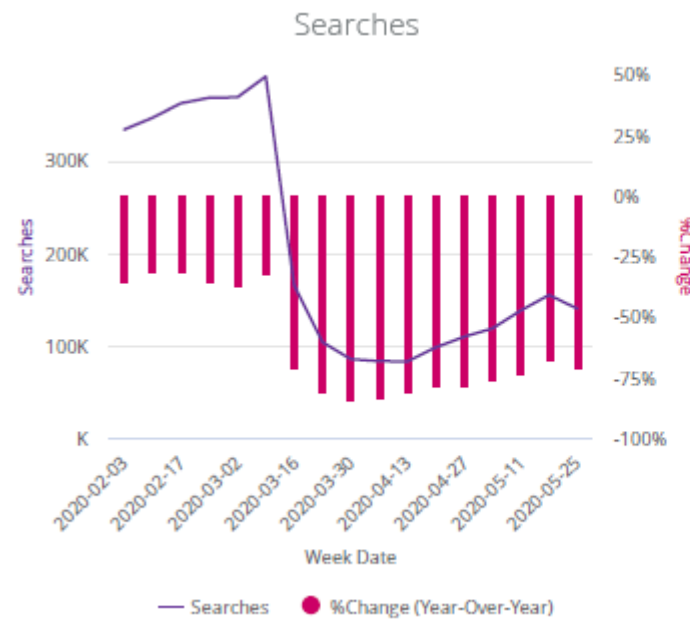
Also in April, passenger traffic was down 95.1% compared to 2019 at Hartsfield-Jackson International Airport.

	April 2020	April YTD (Jan-Apr) 2020
Hotel RevPAR YoY	-77.6%	-38.6%
Hotel Rooms Sold YoY	-61.6%	-26.9%
Domestic Passenger Traffic YoY	-94.7%	-38.0%
International Passenger Traffic YoY	-98.1%	-44.7%
Total Passenger Traffic YoY	-95.1%	-38.8%

GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

Aggregate Search and Booking activity for Georgia flights and hotels from both domestic and international markets bottomed out the week of April 6 (-83% YoY for Searches and -88% YoY for Bookings).

While WoW activity has fluctuated up and down, the overall trend has been a modest climb upwards, with the week of 5/25 landing at -70% YoY for Searches and -72% YoY for Bookings.



GEORGIA'S TOURISM INDUSTRY: EARLY INDICATORS

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CHECKING THE PULSE: TRAVELER SENTIMENT

- Perceptions about the safety of travel have improved since March:
 - The vast majority of Americans feel safest in their cars and at small, open-air gatherings that are close to home
 - Most travelers still do not feel that either hotels or short term rentals are safe right now
 - Air travel, public transportation, and indoor attractions are seen as the least safe
- Support for opening communities to visitors is increasing; however, resident sentiment about seeing their community advertised to tourists is largely negative or neutral
- Confidence in future travel plans is improving: More than half of travelers report no/little chance of cancelling trips due to COVID-19, and reduction or postponement of travel are more likely
- Travelers continue to look to the CDC and to federal and state public health departments to signal when it's safe to travel, but are more likely to look to travel providers and content producers for trip planning

CHECKING THE PULSE: TRAVELER SENTIMENT

- Safety considerations are still paramount, impacting where travelers choose to visit, stay, and spend their money. The most critical practices for travelers are:
 - Availability of hand sanitizer, disinfectant wipes, and masks
 - Well-explained and/or certified cleaning and disinfecting protocols
 - Visible cleaning activity in public/shared spaces
 - Required health screenings for employees and the public
 - Required employee PPE
 - Enforcement of social distancing

CHECKING THE PULSE: TRAVELER BEHAVIOR

- 70% of travelers say they have at least one leisure trip tentatively scheduled in the remainder of 2020
 - October is the top month for travel, followed by September and August
 - More than 50% have some type of travel planned in the next six weeks, with a strong emphasis on road trips
- More than 40% of travelers say their next road trip will take place in the next three months
 - July is the most popular month, followed by June and August
 - Expected distance is trending upward; on average, they'll be likely to drive 300-350 miles from home
 - Travelers are most likely to be visiting friends and relatives (~25%), but some (~15%) will be on a vacation/getaway

CHECKING THE PULSE: TRAVELER BEHAVIOR

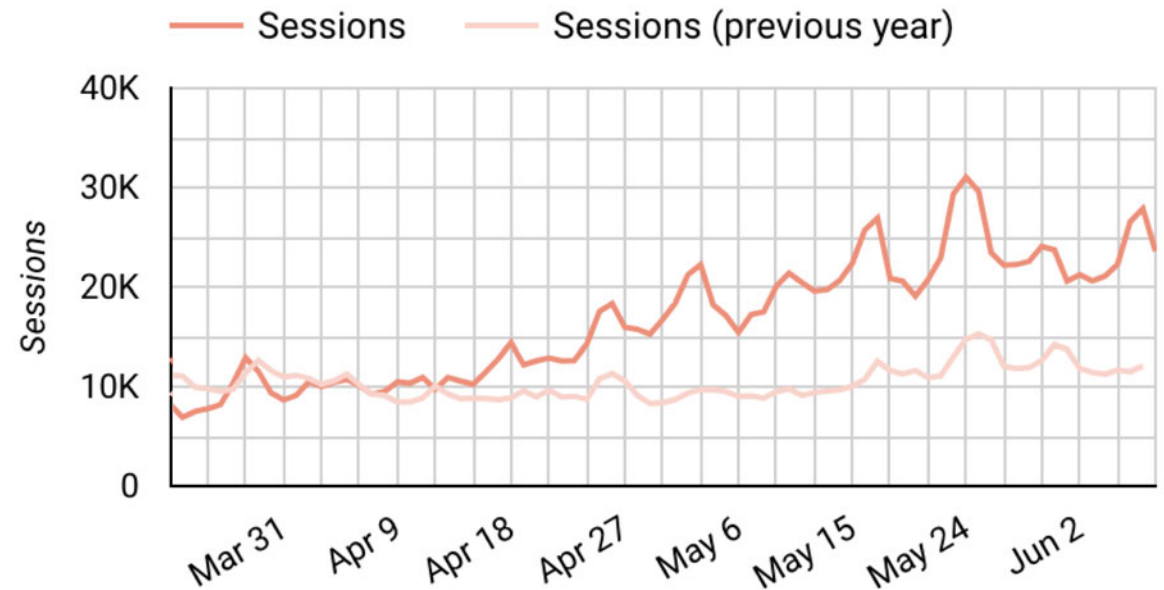
- Other than visiting friends and relatives or “staycationing,” travelers continue to say they are most likely to visit beaches, small towns and other rural destinations, and national/state parks or other outdoor recreation destinations
- Travelers are placing strong trust in DMOs as sources for safety and travel information, ranking official state tourism offices and local visitors’ bureaus second behind friends and family
- Millennial & Gen Z travelers and travelers in the South & Midwest are the most excited to learn about new travel experiences and to take a weekend getaway in the next month
- Younger generations are more likely to use a variety of social media and digital tools in trip-planning, while Gen X & Baby Boomers are more likely to rely on web searches and email
- While business travel will likely take longer to recover than leisure, 25% of regular convention/conference travelers have tentative plans to attend a group meeting in the remainder of 2020

WEBSITE: TRAFFIC

To understand the impact of the pandemic on website traffic, we benchmarked performance of the Explore Georgia website against the websites for 28 DMOs (state and local). For the month of May, organic traffic for DMO websites was down an average of 15%, but the Explore Georgia site was up 106% during that same period. We also saw a record-breaking day for traffic and search results to the site on May 30.

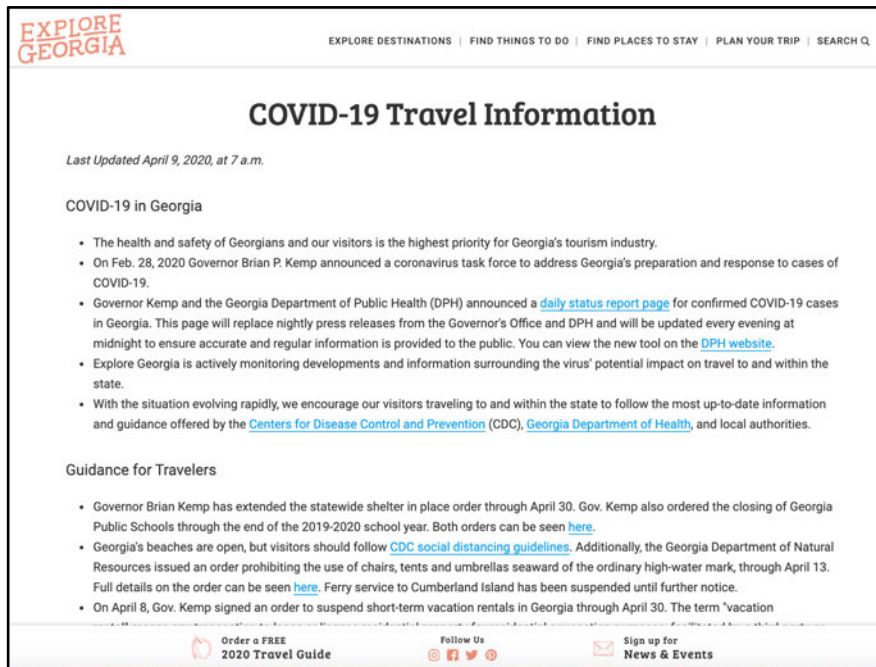
We're seeing significant YoY increases in traffic on our site to the accommodations, food/drink, and travel guide order pages. Partner referrals from business listings have also seen a sharp increase YoY. These are all strong indicators that travel planning is returning.

ExploreGeorgia.org Organic Traffic



WEBSITE: UPDATES

To address the information visitors are seeking now, we've evolved the Travel Alerts page on our website. The page originally included information on COVID-19 in the state (cases, public health guidelines, etc.) and travel information & restrictions related to the pandemic. Travelers are now looking for both practical information and travel and trip planning information, as well as Explore Georgia from Home content. We've updated the page to serve all needs. The Travel Alerts page is linked on every page of the site via a green banner at the top of the page, ExploreGeorgia.org/covid.

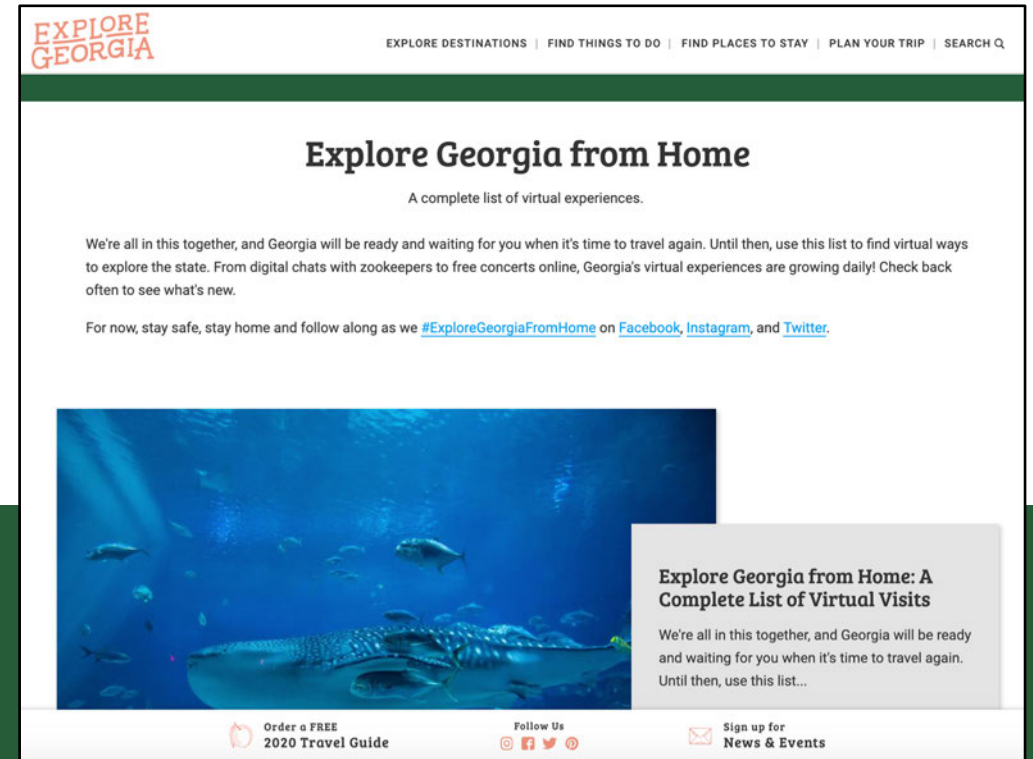


WEBSITE: PRIMARY PAGES



[COVID-19 Travel Alert](#)

Information about COVID-19 in the state, inspiration for travelers, and Explore Georgia from Home content
[ExploreGeorgia.org/covid](#)



[Explore Georgia from Home](#)

A digital oasis where visitors can get lost in the beauty of our state, learn a little, and play safely from their homes
[ExploreGeorgia.org/fromhome](#)

SOCIAL MEDIA

During April and May, all Explore Georgia social media channels continued to share the Explore Georgia from Home campaign, including moments of Zen, good news stories, and new tools and games. We also began to incorporate travel inspiration content to respond to our community's desire to plan travel and dream about the future.

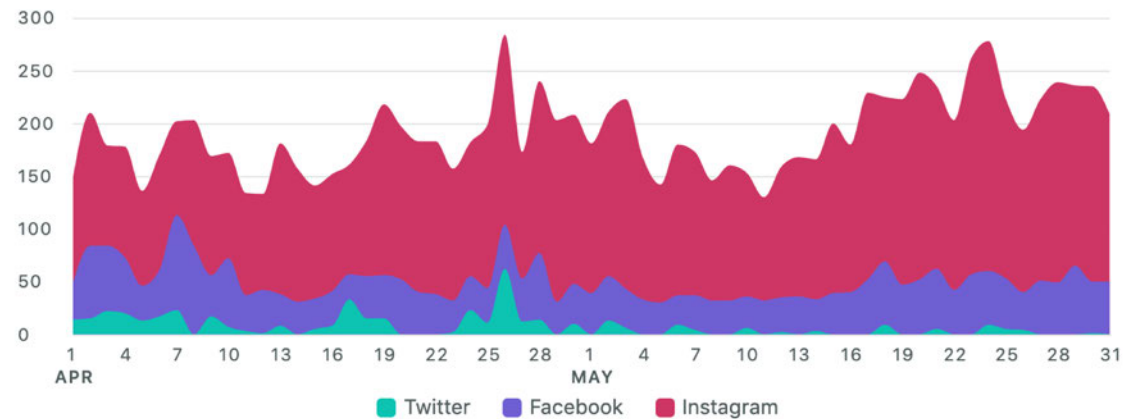
Despite a significant pivot in the type of content being shared, all channels continue to see MoM growth in engagement rates, impression levels, and followers. This approach is clearly filling a need with our visitors and keeping the state top of mind.

Explore Georgia Social Media Audience Growth

Cross-Network Audience Growth

See how your audience grew during the reporting period.

Audience Gained, by Day



Audience Growth Metrics

Total Audience ⓘ

Totals

792,529

% Change

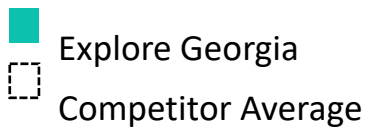
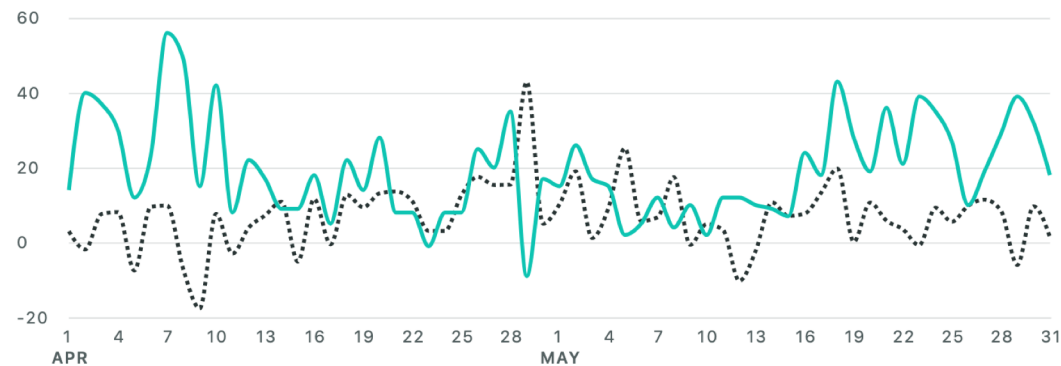
↗ 0.8%

SOCIAL MEDIA

Looking at our competitive set of state DMOs in the Southeast, Explore Georgia is leading the pack in terms of gaining new followers during this crisis. Explore Georgia is the second most followed state DMO in the SE (behind Florida), and number seven in the nation.

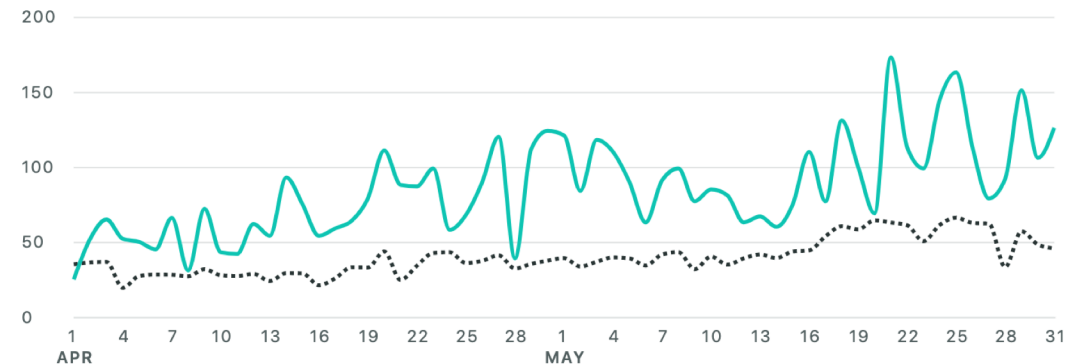
Facebook

Net Fan Growth, By Day

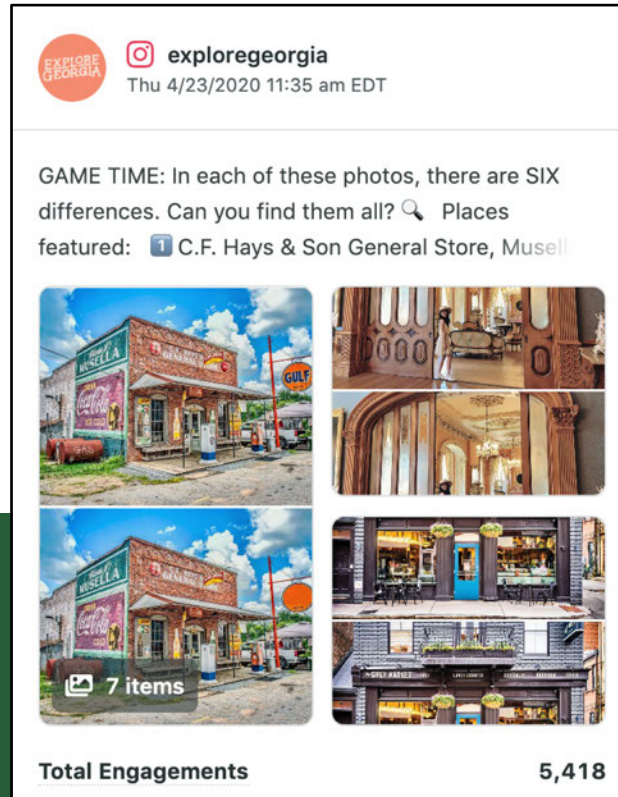


Instagram

Net Follower Growth, By Day

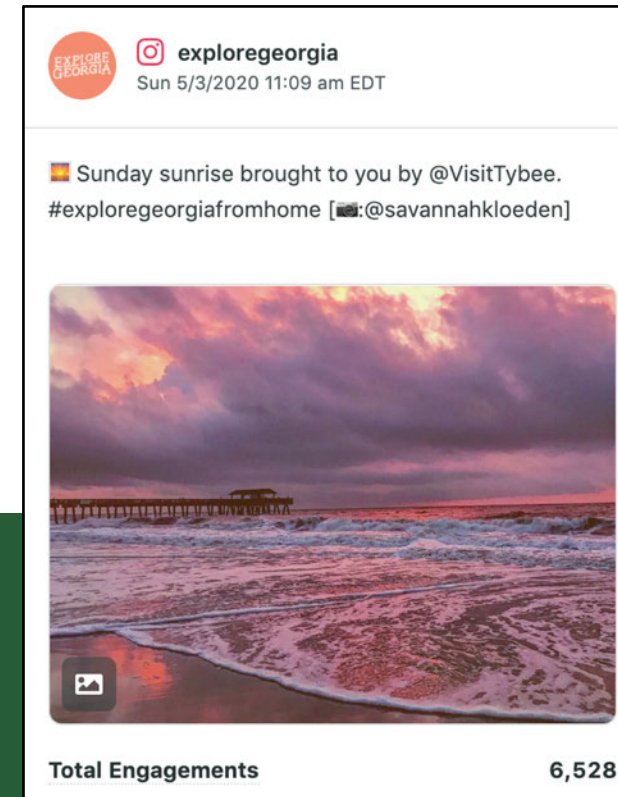


SOCIAL MEDIA: CONTENT EXAMPLES



Explore Georgia from Home

Spot the difference game featuring seven locations throughout the state



Travel Inspiration

Sunrise on Tybee Island

EXPLORE GEORGIA

QUESTIONS?

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